

# A Social Viability Assessment of Cruise Tourism in Southern Belize



Submitted to:  
The Belize Tourism Board and Ministry  
of Civil Aviation and Culture



Submitted by:



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## **LIST OF ACRONYMS, ABBREVIATIONS AND PHOTO CREDITS**

### Acronyms and abbreviations:

Action Plan – Belize Tourism Board Action Plan 2010-2012  
APAMO – Association of Protected Areas Management Organizations  
BHA – Belize Hotel Association  
BNTGA – Belize National Tourist Guide Association  
BNTOA – Belize National Tour Operator Association  
BTB – Belize Tourism Board  
BTIA – Belize Tourism Industry Association  
DOE – Belize Department of the Environment  
FGTZ – Fort George Tourism Zone  
GOB – The Government of Belize  
Ministry of Tourism – Ministry of Tourism, Civil Aviation and Culture  
NGO – Non-Governmental Organization  
PTGA – Placencia Tour Guide Association  
RCCL – Royal Caribbean Cruises Ltd.  
STP – Belize Sustainable Tourism Program  
Tourism Master Plan – Belize National Sustainable Tourism Master Plan

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## I. EXECUTIVE SUMMARY

Seatone Consulting presents the following social viability analysis and options for future collaboration based on a proposal for a cruise operation in Placencia put forward to the Government of Belize (GOB) by Shabir Walji—a developer who is the owner of several resorts in Northern Ambergris Caye—in collaboration with Royal Caribbean Cruises Ltd (RCCL).<sup>1</sup> The results of an open and extensive public consultation process shape the content of this report and inform its findings and recommendations. The narrative below speaks to the hopes, concerns and interests of the citizens and residents of southern Belize.

### ***Background and methodology***

In late 2009 a private development group submitted a proposal directly to the Prime Minister of Belize and the Ministry of Tourism, Civil Aviation and Culture (Ministry of Tourism) that called for the establishment of a new cruise port of call (port designation) in the southern village of Placencia. The proposal—described by the developer as small scale or “niche” cruise tourism, in contrast to “mass tourism”—has catalyzed much discussion and debate on the benefits and drawbacks of this sector in Belize. Many industry stakeholders and observers believe that GOB did not adequately prepare for cruise tourism in the past. For example, until the recent leadership demonstrated by the Belize Tourism Board (BTB) and Ministry of Tourism in establishing the Fort George Tourism Zone (FGTZ), which aims to enhance the cruise visitor experience as well as local benefits derived from cruise tourism, the sector has seen minimal oversight and management in Belize City.

In response to these circumstances—and in order to inform the Cabinet of Ministers on the potential economic, social, and environmental impacts of the submitted proposal—the BTB and the Ministry of Tourism commissioned an independent consultancy to assess, from a broad social perspective, the viability of a second cruise ship port located in Placencia. The BTB contracted Seatone Consulting as an impartial facilitator to conduct a situation assessment and convene a series of public consultation meetings to assess stakeholder viewpoints on the issue and identify social considerations that GOB needs to factor into decision-making. In turn, the outcomes of the public consultation will help to better inform the BTB and Ministry of Tourism’s collaborative efforts with southern tourism destinations by bringing public concerns and priorities to the forefront as local communities seek sustainable economic development opportunities that benefit the largest number of Belizeans possible. The openness demonstrated by GOB to facilitate this consultation process represents a significant departure from past administrations’ traditional approach of closed-door decision-making.

The social viability assessment was comprised of two components: 1) an on-the-ground situation assessment consisting of a survey of public attitudes, perceptions,

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<sup>1</sup> The presentation provided by RCCL and the private developer at the public consultations can be found on the BTB website at: <http://www.belize tourism.org/content/view/266/348/>.

and viewpoints regarding potential expansion of cruise tourism to southern Belize; and 2) facilitation of structured public meetings that enabled stakeholders in the south an opportunity to express their sentiments to the project developer as well as the BTB and the Ministry of Tourism. It is important to note that the assessment occurred in tandem with a more technical analysis of the cruise sector conducted by Travel and Leisure Europraxis—the consulting firm contracted by the BTB and the Ministry of Tourism’s Sustainable Tourism Program (STP) to develop the Belize National Sustainable Tourism Master Plan (Tourism Master Plan). It is expected that the collective results of this social viability assessment and the technical analysis will help determine how the proposed Placencia project may or may not align with the preliminary medium and long-term national tourism development goals for the cruise sector being crafted as part of the Tourism Master Plan development process.

### ***Key findings of the situation assessment***

In October and November 2010, Seatone Consulting conducted confidential situation assessment interviews with a balanced set of 28 stakeholders in southern Belize. Participants included hoteliers, restaurateurs, tour operators, village council chairmen and representatives, industry association presidents, tour guide association presidents and guides, protected area managers, non-governmental organizations, and representatives of indigenous culture among others. The comprehensive analysis of all interview responses is found in section IV of the report. Key findings of the situation assessment include the following:

- The natural and cultural resources of southern Belize are considered the most valuable tourism assets of the region.
- There is widespread skepticism and resistance to development of a mass tourism cruise model in southern Belize.
- Stakeholders believe key officials have not been transparent and forthcoming regarding government interest in southern Belize as a potential cruise tourism destination.
- Stakeholders on all sides of the issue feel they do not have enough information from the private developer to properly evaluate the benefits and drawbacks of expanding cruise tourism to southern Belize.
- Among stakeholders who express an interest to learn more and possibly cultivate small scale cruise tourism in the south, there are many conditions required to meet that interest.
- There is widespread interest among stakeholders throughout the south to engage in collaborative planning with the BTB, Ministry of Tourism and other government agencies that aims to solve the most pressing tourism development challenges of the region.

### ***Results of the public consultation meetings***

Seatone Consulting collaborated with the BTB and Ministry of Tourism to facilitate a total of three public consultation meetings on cruise tourism subsequent to the situation assessment. Meetings were convened in key communities that may be impacted directly or indirectly by the proposed cruise project in Placencia. The communities included Placencia (October 22<sup>nd</sup>), Punta Gorda (November 29<sup>th</sup>) and Dangriga (November 30<sup>th</sup>). The meetings represented the second and final public component of the consultation process.

The collective results of the meetings confirmed key findings of the situation assessment and revealed significant concerns on a host of issues related to the potential introduction of cruise tourism in the south. In Placencia—the center of the proposed development scheme—the meeting dynamic was dominated by negative perceptions of the cruise industry and mistrust of government actions leading up to the public consultation. Meetings in Punta Gorda and Dangriga realized similar sentiments about the cruise industry, but also experienced more in depth discussion between the public, government officials and private developer that focused on the need to promote economic growth that ensures direct benefits for local Belizeans. Of note, many individuals and groups throughout the region demonstrated outright opposition to cruise ships in the south, and articulated numerous reasons to support their skepticism and resistance.

Across the board, citizens and residents throughout the south repudiated the concept of a “tourist village within a tourist village” as this, in the view of many, typifies the exclusive and consolidated nature of the cruise industry—what many consider a problematic element of mass tourism models of development. Some showed interest in cultivating a market for small ships (e.g. <500 passengers) but emphasized the need to spread economic benefits, ensure local operational control and improve management of the sector in Belize City prior to considering geographic expansion or new port designations in the south. Finally, several meeting attendees expressed frustration at the limited amount of information provided by the private developer, and thus felt ill prepared to offer an informed evaluation or recommendations on the issue to government officials.

### ***Recommendations for future collaboration***

The inherently complex set of circumstances surrounding the issue of cruise tourism in Belize—specifically the proposed Placencia project—necessitates a set of distinct yet interrelated alternatives for consideration by the BTB and the Ministry of Tourism.

Based on the exchange of ideas, concerns and viewpoints during the public consultation, the central recommendation of this report is that **the government of Belize should not approve a new port of call (port designation), contract or agreement with cruise lines, developers or their affiliates for operations in the Placencia Peninsula.** Not only is there widespread resistance to the establishment of cruise tourism in Placencia, as demonstrated by public sentiment, there is also abundant and compelling evidence that communities in the surrounding area are ill

prepared for cruise ship arrivals. Moreover, given the fact that the FGTZ was just recently launched, the Belize City model, for many, still represents a poor precedent for effective management and control of the cruise sector.

Expansion of cruise tourism to fragile areas such as the Placencia Peninsula is therefore highly problematic, risky and may result in irreversible negative impacts to the existing tourism sector, the ridge to reef resources of the south, and the safety and security of local communities. And yet tourism—including the cruise industry—remains a robust and growing sector of the Belize economy. For example, the Belize City cruise port now employs more than 2,000 Belizeans. However, evidence from other destinations suggests that negative impacts may outweigh benefits when cruise tourism overlaps in the same geographic region as an established overnight sector. The alternatives outlined below acknowledge the potential future growth of cruise tourism in Belize, yet are derived from results and analysis of the social viability assessment. Each presents collaborative processes that involve a broad cross section of stakeholders working to achieve their economic self-interests through shared responsibility, trust and mutual gain. Specific steps, additional structure and responsibilities would be defined once a process is convened.

In the context of the central recommendation above, alternative 1 presents an approach that is appropriate and ongoing from a policy perspective. Alternatives 2 and 3 describe options that Seatone Consulting believes are more appropriate, inclusive and beneficial for southern Belize but exceed the legal responsibilities of the BTB, Ministry of Tourism and other relevant government bodies.

**Alternative 1: Implement recommendations outlined in the BTB Action Plan 2010-2012 and the National Sustainable Tourism Master Plan.**

The BTB has mapped out ambitious goals, new strategies and significant restructuring for the 2010-2012 period. Simultaneously the STP is nearing publication of the Tourism Master Plan, which will provide national-level vision, goals and direction for future tourism development in Belize. Furthermore, completion of infrastructure projects with funds from the Inter-American Development Bank will improve the capacity of several destinations (including in the south) to embrace well-planned growth and development in the tourism sector. However, reducing the widespread mistrust, frustration and cynicism surrounding the Placencia cruise proposal is a critical prerequisite to building trust and strengthening the BTB's established relationships—from local to national level chapters—with the Belize Tourism Industry Association (BTIA), Belize National Tour Operators Association (BNTOA), Belize National Tourist Guide Association (BNTGA), Belize Hotel Association (BHA), Association of Protected Areas Management Organizations (APAMO) and the southern village councils.

In pivoting off the focus on cruise tourism in the south, the BTB and Ministry of Tourism may foster previously unseen public/private sector collaboration aimed at implementing new marketing strategies; enhancing destination planning, standards

and quality assurance; and improving organizational performance and efficient revenue collection. In addition, lessons learned in the newly created FGTZ will increase understanding—in both government circles and the private sector—of the challenges and necessary response to ensure effective management and control of cruise tourism in Belize, and will help guide any future expansion (geographic or not) of the sector.

**Alternative 2: Conduct a “Limits of Acceptable Change” social study in the southern Belize region.**

This alternative exceeds policy requirements of the BTB and seeks to maximize public participation in tourism planning and development by determining, from a broad social perspective, the “Limits of Acceptable Change” (LAC) for the most valuable tourism assets of southern Belize—namely the rich diversity of terrestrial and marine ecosystems and cultural sites that form the bedrock of the industry. Effective planning and visitor management in this case requires a “horse before the cart” scenario that builds on the knowledge, expertise and economic needs of local citizens and residents, integrated within the legal authority of government resource management agencies and non-governmental organizations (NGOs). The LAC is a well-tested model for dealing with issues of recreational carrying capacity at sensitive natural sites and tourist attractions. Conducting a comprehensive LAC study in southern Belize will shed light on both the type and scale of tourism that is most appropriate for the region. Moreover, the results of such a collaborative study will further inform the renewed effort for effective coastal zone management planning in Belize.

The LAC planning process consists of 9 interrelated steps that result in the development of standards for acceptable resource conditions; an assessment of current resource conditions—including inventory and ongoing monitoring of sites—in relation to mutually agreed upon standards; and the design and implementation of management prescriptions that bring resource conditions into compliance with said standards. In this context, the LAC assumes that recreational use of natural and cultural sites has to be allowed, yet must be consistent with a high degree of resource protection (Cole and Stankey, 1997). Furthermore, it is important to note that the compromise of defining allowable limits of recreational use while ensuring effective resource protection should be achieved through a collaborative process involving multiple stakeholder groups. In this sense, the outcomes of an effective LAC study will balance what oftentimes appear to be conflicting goals of economic development and resource protection—the current dilemma facing the residents of southern Belize.

**Alternative 3: Facilitate alignment of development and resource conservation priorities across ministries, departments and groups; review and refine the Belize Tour Guide Training Program; and conduct peer exchange programs on effective management of cruise visitors.**

This alternative contains three separate yet related components and requires significant cooperation and coordination among different government ministries,



departments and protected area authorities. Similar to alternative 2, it exceeds policy requirements of the BTB. It also implies extensive collaboration between the BTB, private sector associations and those interested to learn and apply lessons on effective visitor management from existing cruise ports in Belize and elsewhere.

#### *1. Align development and resource conservation priorities*

Belize has invested substantially in articulating national development, disaster response, and biodiversity conservation policies, strategies and plans. However, these documents commonly emanate from different ministries, departments or NGO groups, which creates a tendency for economic development to be viewed as separate and distinct from resource conservation, and an emerging propensity for policy incoherence and fragmented implementation. The recent publication of the Action Plan and upcoming Tourism Master Plan creates a unique catalyst and foundational step to align goals and strategies across ministries, and with resource management agencies and NGOs. Subsequent to this process, all relevant parties may work collaboratively to implement a governance structure that integrates development and resource conservation priorities for the benefit of tourism-dependent communities, and therefore improves public administration and management of natural and cultural assets in Belize.

#### *2. Review and refine the Tour Guide Training Program*

The BTB has a long established Tour Guide Training Program that provides professional development on multiple subjects ranging from natural and cultural history, visitor interaction and sustainable practices among others. According to the BTB website, individual tour guides are required to be “licensed by the Belize Tour Guide Licensing Committee...instituted in 1994.” The program has functioned effectively for several years and trained hundreds of tour guides from all over the country. However, gaps and weaknesses have been identified since publication of the first training manual and launch of the program. This provides the rationale and justification to re-visit, refine and ultimately improve the Tour Guide Training Program.

Specifically, there is an opportunity for the BTB to work closely with local, regional and national tour guide associations to strengthen course content, improve delivery methods and enhance opportunities for localized training and accreditation. While the BTB would still manage and maintain oversight of the program, a progressive “bottom-to-top and top-to-bottom” approach could maximize local expertise and ease the financial burden and time commitment for aspiring tour guides seeking certification. Moreover, the BTB can incorporate standards into training modules and develop mechanisms for ongoing quality assurance monitoring. The BTB should also consider designing new modules aimed at strengthening tour guide entrepreneurial skills, such as business planning, marketing and financial management. Finally, all training may be supported and reinforced through government tax incentives for small business and micro-financing opportunities for guides seeking to develop independent tour operations.

### *3. Develop and implement peer exchange programs*

In recognition of the significant interest to cultivate small scale, sustainable and locally controlled cruise tourism in southern Belize, the BTB can sponsor a peer exchange program for operators and guides seeking lessons on effective management of cruise visitors. Similar to the aforementioned alternatives, design of a peer exchange program should be a collaborative public/private sector initiative based on shared responsibility and commitment to sustainability of the sector. A well designed and effectively managed program will allow experienced professionals in cruise tourism to demonstrate, explain and model management strategies while peers from visiting destinations observe, question, explore and eventually apply new skills and techniques aimed at improving the visitor experience and minimizing impacts to natural and cultural sites. The program may initially focus on Belize City—learning from both the private sector experience and newly established government regulations—but could expand to include neighboring cruise ports such as Cozumel, Mexico or Roatan, Honduras and eventually other Caribbean cruise destinations facing similar challenges as Belize. Specifically, such a program may benefit from exchange of effective management strategies in the Eastern Caribbean, where small-scale cruise tourism is well established and integrated into local economies. Finally, a comparative analysis of lessons learned in the management of the Belize cruise sector to the standards defined by a LAC process may provide additional insight as to whether cruise tourism on any scale represents appropriate development for the south.

### ***Recommended alternative***

Collaboration can come in many forms and contexts. At this time Seatone Consulting believes that Alternative 2 is the optimal approach to leverage the collaborative process and outcomes of this consultancy. Alternative 2 acknowledges, integrates and builds upon the ongoing work of the Action Plan and Tourism Master Plan (alternative 1). However, it goes beyond the minimally required policy approach and offers significant opportunities for regional stakeholders to proactively design and shape conditions that guide future tourism development in southern Belize. The urgent need to balance economic development with resource conservation necessitates an inclusive process involving all affected parties in government, civil society, the NGO community and the wider public. In addition, there is little historic precedent for some of the core elements outlined in alternative 3. That said, alternative 2 tests new methods of collaboration that may build a strong foundation to address activities in alternative 3 in the near future.

### ***Rationale for recommendations***

The basis for the central recommendation above and proposed alternatives is an attempt to balance resistance to cruise ships in southern Belize with the desire to create a durable and sustainable tourism sector that brings maximum benefits to the largest number of Belizeans possible. The recommendations are informed by the analysis of 28 stakeholder interviews and results of three separate public consultation meetings that, collectively, realized participation of more than 600 residents from the area. Key aspects of the rationale include (see section VI below):

- Lack of public support: There is widespread opposition to the introduction of cruise tourism in the south among nearly all materially invested groups in the tourism sector. Stakeholders have articulated numerous reasons to resist what many consider the eventual establishment of a mass tourism model of cruise development. These include potential threats to the established overnight sector; damage to natural and cultural resources from oversized and inadequately managed tour groups; exclusivity and consolidation of the industry; lack of infrastructure; the precedent of a poorly managed cruise sector in Belize City; and the inability to evaluate cruise tourism in the south within the context of a national level vision, goals and strategies for sustainable tourism development.
- Need to monitor, evaluate, and learn from Belize City: Efforts are underway to improve the management and control of cruise tourism in Belize City. In fact, the newly created FGTZ may in time provide a model for how to effectively manage cruise tourism and associated terrestrial and marine tour activities.<sup>2</sup> However, unless both GOB and the private sector can demonstrate improved management effectiveness, it remains highly problematic and risky to expand cruise tourism to the south. As an example, until there are functioning policies, regulations and enforcement protocols in place that control cruise ship size and numbers of passengers arriving in Belize City, the fear of “small ships” opening the door to mass tourism in the south are well founded.
- Vague development plans: Stakeholders in southern Belize have been unable to evaluate the potential impacts (positive and negative) of the Placencia proposal due to limited available information on the development schemes, port designation request, expected economic benefits and analysis of market projections. Some in the public—particularly local Belizean tour operators and guides—have begun to articulate preferred conditions that must be in place prior to considering cruise tourism and any associated development, thus laying the groundwork for continued dialogue with the private development group that purchased land at Placencia Point.
- Benefits of a LAC study: The results of the cruise viability assessment provide the rationale and justification for a collaborative multi-stakeholder process to determine the type and scale of tourism development most appropriate for the south. It is anticipated that an effective LAC study will strengthen public/private sector partnerships and contribute to a mutually agreed upon planning and visitor use management framework, thus building capacity—by grassroots design—for enhanced protected area management and long-term sustainability of tourism activities in the region.

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<sup>2</sup> Information on the FGTZ can be found at: <http://www.belize tourism.org/fortgeorgetourismzone>.

## ***Challenges***

There is no priority or logical sequence to these challenges. Each should be given equal consideration. A detailed description is included in section VI below.

- The circumstances surrounding the potential introduction of cruise tourism in southern Belize pose significant challenges to enabling an environment of collaboration versus confrontation, particularly in Placencia. In this setting, effective collaboration may require a level of transparency and information sharing not previously seen from high-level government officials. Conversely, the ability of government to foster rationale dialogue and garner feedback on its policies, plans and attempts to create sustainable economic development opportunities—to “make rain” for Belizeans—may benefit from toned down rhetoric and accusations that emanate from the public.
- It is problematic that foreign investors—notably developers working in concert with the cruise line industry—can submit proposals directly to the highest level of government for review and approval, particularly when associated development projects may result in large scale impacts and changes to Belizean communities and resources. Although such “top down” planning in this case contributed to a reactive versus proactive response from the public, the consultations convened by the BTB nonetheless generated tremendous feedback on the issue and will inform government’s evaluation of the proposal and its views toward future tourism development.
- Improvements in the management and control of cruise tourism in Belize City represent a work in progress. It may take a significant amount of time and effort by all parties to demonstrate desired changes and lessons learned that, in turn, inform any future expansion of the sector in Belize.
- It is unclear what level of transparency and collaboration the cruise lines will have with the public as they seek to expand operations in Belize, and what partnership role, if any, they will play to foster sustainable development and effective visitor management at the natural and cultural sites that fuel profits for the industry.
- The natural resource base upon which the Belize tourism sector depends is in some cases severely threatened, and may be irreparably harmed by poorly planned and unsustainable tourism activities and coastal development projects. Furthermore, the reef—viewed by nearly all interviewed stakeholders as the most valuable tourism asset in southern Belize—is in jeopardy of losing its World Heritage Status, which could have significant public relations consequences for tourism.
- Effective implementation of national tourism development plans requires seamless transition across political administrations to ensure the durability

and longevity of goals, strategies and outcomes. A number of interviewed stakeholders noted that Belize is much better at developing than actually implementing its plans. As an example, there is precedent of past plans related to the cruise sector being shelved, or their main recommendations ignored, when new political parties come into power or lucrative development projects are proposed.

### ***Conclusion***

The cruise viability assessment has revealed an earnest desire by multiple stakeholder groups to work closely with government on tourism planning and development issues. In pivoting off the cruise issue in the south, the BTB has the opportunity to build trust and facilitate cooperation on a host of issues outlined in the Action Plan and upcoming Tourism Master Plan, and at a scale and level of civic engagement not previously seen in the region. On the other hand, private sector interests and the wider public may bring a proactive approach to collaboration based on rational dialogue, openness, mutual respect and shared responsibility. The past development and implementation of whale shark guidelines and marine recreation standards demonstrates strong precedent for precisely this type of effective collaboration, which in turn leads to economically beneficial outcomes while maintaining the health and resiliency of the region's fragile resources. It is in this context that the recommendations born of this consultancy may provide a pathway to sustainable economic prosperity that grows from the expertise and interests of all public and private sector players throughout southern Belize.

## **II. INTRODUCTION**

Internationally recognized as "Mother Nature's Best Kept Secret," Belize has long been promoted as an ecotourism destination renowned for its lush rainforests, ancient Mayan ruins, beautiful mangroves and beaches, and the largest coral reef system in the western hemisphere. Tourism has since become the dominant sector of the Belizean economy, particularly in an era of increasingly available means for global communication and travel. According to the recently published BTB Action Plan, "tourism expenditures now represent 22% of GDP and one in every seven jobs is related to or driven by tourism."

In recent years cruise tourism has emerged as a significant and growing component of the industry. Since 1998 cruise lines have regularly included Belize as part of their western Caribbean itinerary. In 2009 Belize received the third highest annual number of cruise visitors to its shores at 705,000, and the global trend of growth in the cruise sector may lead to as much as a 5% increase in visitor arrivals for 2010. Statistics kept by the BTB indicate that approximately 85% of cruise passengers disembark while in Belize. Of this number, some 45% to 50% participate in organized tours, while remaining passengers commonly explore the streets of Belize City, currently the only cruise port of call in Belize. Those who embark on day tours typically visit popular terrestrial and marine attractions such as Nohoch Che'en (Caves Branch), the Mayan

ruins at Altun Ha and Xunantunich, the Belize Zoo, and several nearby cayes, coral reefs and marine protected areas.

In late 2009 a private development group submitted a proposal directly to the Prime Minister of Belize and the Ministry of Tourism that called for the establishment of a new cruise port of call (port designation) in the southern village of Placencia. The proposal—described by the developers as small scale or “niche” cruise tourism, in contrast to “mass tourism”—has catalyzed much discussion and debate on the benefits and drawbacks of this sector in Belize. For example, many industry stakeholders and observers believe that GOB did not adequately prepare for cruise tourism in the past. Although an official cruise policy provides guidelines for the management and development of cruise visitation in Belize City, to date there has been limited capacity or political will to enforce some of its core provisions. Therefore the industry has been driven and managed almost entirely by private sector interests. In this setting, the Fort Street Tourism Village has seen minimal government planning and oversight—until recent stepped-up efforts by the BTB—to ensure orderly development and mitigate social, infrastructural, and environmental impacts brought by large numbers of cruise visitors.

As a critical step to consider the merits of this proposal—and its potential economic, social, and environmental impacts to communities and resources in southern Belize—the BTB and the Ministry of Tourism commissioned an independent consultancy to assess, from a broad social perspective, the viability of a second cruise ship port located in Placencia. In this context the consultancy focused on the citizens and residents dwelling in southern Belize and aimed to:

- Assess hopes, concerns and viewpoints on the Placencia Point development proposal and the introduction of cruise tourism in southern Belize, and
- Identify considerations that government needs to factor into decision-making as it evaluates the proposed development scenario

Importantly, the assessment occurred in tandem with a more technical analysis of the cruise sector conducted by Travel and Leisure Europraxis—the consulting firm contracted by the BTB and the Ministry of Tourism’s STP to develop the Tourism Master Plan. It is expected that the collective results of this social viability assessment and the technical analysis will help determine how the proposed project for Placencia may or may not align with the preliminary medium and long-term national level tourism development goals for the cruise sector being crafted as part of the Tourism Master Plan development process. Furthermore, as a key step to meeting the ambitious goals and expected outcomes of the BTB Action Plan, the results of this consultation process may create a replicable model for future public/private sector collaboration on tourism development issues in Belize.

### III. METHODOLOGY OF THE CONSULTANCY

In September 2010 the BTB contacted Seatone Consulting to secure an independent and impartial consultant for A Social Viability Assessment of Cruise Tourism in Southern Belize. Seatone Consulting was informed that the consultancy would be comprised of two components: 1) an on-the-ground survey of public attitudes, perceptions and viewpoints regarding potential expansion of cruise tourism to southern Belize; and 2) facilitation of structured public consultation meetings that enable citizens and residents in the south an opportunity to express their sentiments and concerns on the issue to the private developer as well as the BTB and Ministry of Tourism.

In planning meetings with the BTB, Seatone Consulting proposed that the initial survey consist of a situation assessment involving confidential interviews with a balanced set of stakeholder interests in the tourism sector. Given the potential regional impact of the project, it was jointly decided that public consultation meetings be held not only in Placencia—the site of the proposed new cruise terminal and tourist village—but also the nearby communities of Punta Gorda and Dangriga. In addition, villages surrounding these areas were invited and encouraged to participate in the public consultation process, and thus the BTB cast a wide net for securing stakeholder feedback on a critical tourism development issue.

#### *Purpose and scope of the situation assessment*

The primary benefit of the situation assessment is that it offered a comfortable venue in which affected stakeholders could initially express their perspectives on cruise tourism in a confidential format. Seatone Consulting felt this approach was critical to encourage candid responses from interviewees, gain insight and understanding on key issues from a range of viewpoints, and solicit considerations that government needs to factor into the decision-making process as it evaluates the Placencia Point proposal as well as cruise tourism in the south more generally.

In October and November 2010, Seatone Consulting conducted interviews with materially invested stakeholders in the tourism sector throughout southern Belize. Participants included hoteliers, restaurateurs, tour operators, village council chairmen and representatives, industry association presidents, tour guide association presidents and guides, protected area managers, non-governmental organizations, and representatives of indigenous culture among others. The questionnaire used for the interviews is included in this report as Appendix 2. In addition, informal group meetings were held with tour operators and guides in Monkey River and with the owners of the Big Creek port, although the questionnaire was not used for these meetings.

#### *Facilitation of public consultation meetings*

Subsequent to the situation assessment, Seatone Consulting—in collaboration with the BTB and Ministry of Tourism—facilitated a total of three public consultation meetings on cruise tourism. Informed by the results and early analysis of the situation

assessment interviews, the meetings were designed to achieve the following objectives:

- Identify community-based considerations that government needs to factor into decision-making
- Increase community understanding of potential cruise tourism development
- Identify information needs that inform community-based evaluation of potential cruise tourism development
- Jointly define next steps

The results of this consultation process—the outputs of three public meetings and a detailed analysis of the situation assessment interviews—shape the content of this report and inform its findings and recommendations. The narrative below speaks to the hopes, concerns and interests of the citizens and residents of southern Belize.

#### IV. KEY FINDINGS OF THE SITUATION ASSESSMENT

The assessment findings are based on confidential interviews with a balanced set of 28 stakeholders in southern Belize. Each interview lasted between 60 and 90 minutes. It was explained at the outset that viewpoints expressed would not be attributed to anyone by name or commit individuals to a specific course of action. The key findings and narrative below is based on an analysis of interview responses.

**Key finding:** *The natural and cultural resources of southern Belize are considered the most valuable tourism assets of the region.*



South Silk Caye

It may come as no surprise to many that interviewed stakeholders unanimously cited the diversity of natural and cultural resources—from ridge to reef—as the greatest tourism assets in southern Belize. Specifically, the most commonly named sites were the Belize Barrier Reef Reserve System, terrestrial rainforests and ancient Mayan ruins. Other noted attractions included lagoons, mangroves, beaches and whale sharks. Many pointed out that the

friendliness and authenticity of local culture drives the success of the tourism industry. Some also linked the small-scale nature of development and sparse population to the region's unique culture. In recognizing the value of pristine natural systems that surround these small communities, several respondents made



supportive statements about the terrestrial and marine protected areas found throughout the region.

**Key finding:** *There is widespread skepticism and resistance to development of a mass tourism cruise model in southern Belize.*

A strong majority of respondents expressed the view that a model of economic development based on mass tourism is incompatible with the existing overnight sector and future development potential of southern Belize. Many cited Belize City as an example of poor planning that has resulted in numerous problems and challenges they now associate with the cruise sector. Perceived negative impacts include damage to natural and cultural resources by large and inadequately managed groups; an increase in crime, drugs and sexual exploitation in disembarkation zones; and a lack of planning and effective controls needed to manage the influx of visitor arrivals in an orderly manner for the benefit of the largest number of Belizeans possible.

Respondents commonly described the cruise sector as highly consolidated and exclusive, rather than equating the concept of mass tourism with specific ship sizes or numbers of arriving passengers. From this perspective, most economic benefits are concentrated within the major cruise lines and their close affiliates, often no more than one or two major tour operators in a port of call. Sometimes cruise lines import tour operators or tenders from other countries. It is not uncommon to see the development of a “cruise village” where all the necessary amenities for cruise visitors—tours, shops and restaurants—are consolidated in such a way that the cruise lines reap maximum profits to the exclusion of most local people living near the area of development. Numerous respondents feel the cruise village in Belize City exemplifies such exclusion. Some commented that they have seen similar models in other countries.

A number of respondents believe that, in order to be competitive in such a landscape, tour operators must prioritize acquisition of large volumes of tourists over tour quality and services offered by guides. Many think this results in poorly managed tours, a diminished experience for visitors, and unnecessary impacts to natural and cultural attractions. Numerous respondents, for example, expressed frustration that big tour operators in Belize City regularly disregard regulations that specify how many tour guides must be present to manage a particular number of tourists, and that government does little to enforce existing rules. Many believe this undermines the positive role that guides play in providing quality tours and minimizing visitor impacts at a site.

A significant majority of respondents also cited lack of infrastructure as a major impediment to opening the south to cruise tourism. Several specific infrastructure needs were identified for the area such as docks, roads, water and sewage treatment, and facilities at existing and proposed visitor attractions. Common questions on infrastructure that arose during interviews included the following:

- *“How will we manage sewage and garbage of so many people when we as locals already struggle with these things?”*
- *“Who will bear the cost for disposal of material waste that cruise tourists generate on land?”*
- *“How will we manage vehicle and other traffic on the one small road and sidewalk that leads to and from Placencia Point, or in other areas where cruise tourists go?”*
- *“Do the sites where we propose to take cruise tourists even have adequate infrastructure such as bathrooms?”*

For all the identified challenges and problems associated with cruise ships, a palpable fear exists throughout the region—concentrated most especially in the Placencia peninsula—that opening the south to a mass tourism model of development will bring immediate and lasting negative consequences for the overnight sector. Specifically, there is widespread concern that a large influx of cruise visitors will destroy the small scale, friendly atmosphere and pristine nature that much of the south is known and marketed for, particularly if these arrivals occur during the peak of the overnight season. This change in the type and scale of tourism visitation, some fear, will stigmatize Placencia as a “tacky cruise town” and thus erode its more authentic attributes. These same respondents cited studies that demonstrate how overnight tourists spend significantly more money while in Belize compared to cruise day-trippers, thus stressing the greater long-term value of the overnight sector. Others cited research that shows cruise tourism has negatively impacted the overnight sector in other destinations around the world. Several respondents expressed frustration at what they perceive as government prematurely abandoning support for the long-term viability of their existing product (overnight tourism) in favor of short-term economic benefits that may come from a new cruise terminal in Placencia.

Overall, critics of mass tourism focused primarily on the potential negative impacts to the overnight sector; exclusion of economic benefits for local Belizeans; damage to natural and cultural resources; inadequate infrastructure; ineffective management and control of the cruise sector in Belize City; and the lack of a Tourism Master Plan as a reference point for evaluating cruise tourism in the south. Of note, concerns about mass tourism were widespread among all interviewed stakeholders and thus not limited to any particular interest group or geographic area. In fact, when asked to identify opportunities or needs that could be addressed in the management of the cruise sector in Belize, respondents overwhelmingly stressed that improved planning, management and control must be realized in Belize City before government can or should consider expansion to other areas of the country. Finally, it is important to note that some respondents who potentially favor cultivation of small scale cruise tourism in the south remain wary of the Belize City cruise model, and expressed many of the same concerns as those opposed to mass tourism generally.

**Key finding:** Stakeholders believe key officials have not been transparent and forthcoming regarding government interest in southern Belize as a potential cruise tourism destination.

Many Belizean citizens and residents first heard of the potential for cruise tourism in Placencia during a radio talk show in January 2010. Yet in the following months very little information was forthcoming or made available regarding specific development plans for the area. Later it became public knowledge that Century 21 Real Estate had sold a plot of land near Placencia Point to a private development group with apparent links to RCCL. As information on the proposed development for this parcel slowly surfaced, and in limited fashion, citizens and residents began to fear that cruise tourism in Placencia was already a “done deal” in the words of several respondents. Many in the community began to suspect a lack of transparency, honesty and information sharing by key government officials. This sentiment, accurate or not, contributed to a climate of fear, speculation and a chorus of reactions from the public that grew increasingly organized and vocal through the fall of 2010.

In early August, for example, the Placencia Chapter of the BTIA released findings of a survey on tourism development issues conducted with its members. The purpose of the survey was to acquire feedback that enabled the association to take a position on a variety of development topics and issues versus reacting to every individual project proposed on the peninsula. Of the 58% of paid



The beach fronting Placencia

members that responded to the survey, an “overwhelming majority...voted ‘strongly disagree’ when asked if they were in favor of cruise ship visitors.” Shortly following this press release, the local Tour Operators Association followed suit and publicly declared its opposition to the establishment of cruise tourism in Placencia.<sup>3</sup> Both statements suggest that cruise and overnight tourism are incompatible, particularly given the “low density” visitation rates to the region’s many natural and cultural attractions—the basis upon which the overnight tourism sector in the south has been built.

In late August a schematic plan detailing Belize’s Punta Placencia Cruise Tender Arrival Area and Village—including physical development options for Placencia Point—was delivered to the local village council by a Century 21 Real Estate agent, thereby making information available to the public for the first time. Many industry stakeholders viewed this method of information sharing as suspicious and became

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<sup>3</sup> The full text of public statements on cruise tourism made by various industry and protected area management associations is included in appendix 1.

increasingly vocal in their concerns that cruise tourism in Placencia may have already been sanctioned and approved by GOB behind closed doors. Some industry stakeholders suspected the CEO of the Ministry of Tourism (CEO)<sup>4</sup>—as a former executive and current shareholder at Century 21 Real Estate—had a conflict of interest and had been less than fully transparent in his previous public comments on the issue. A few respondents concluded that given his real estate connection, the CEO could not objectively evaluate nor make recommendations on the proposed development and associated request for designation of a new cruise port of call in Placencia.

Another separate incident involving the BTB further exacerbated growing mistrust in government, particularly among the residents of Placencia. Early during the week of the first public consultation meeting on cruise tourism, a draft version of the Action Plan was released to a limited number of tourism industry stakeholders for editorial review. In the section on destination planning, the document described how the BTB would coordinate with the Placencia community to “assess the viability of a second cruise destination”, thus providing the rationale and purpose for the public consultation process. The headline of this section in the forwarded draft document initially read “Placencia’s Citizenry Prepared to Manage a Sustainable Cruise Destination”—language that heightened suspicion among many that cruise tourism was a foregone conclusion.

In the final version of the Action Plan, published just a few days later, the headline instead read “Public Consultation Undertaken to Assess the Viability of a Cruise Port Destination in Placencia.” This late editorial change further undermined trust and confidence that government planned to genuinely consult and respond to people’s concerns in the affected communities. As a result, when the BTB described the cruise public consultation process during its Action Plan press release in Belize City—a day before the first cruise meeting in Placencia—the BTIA National issued a formal statement critical of the process to date and requested that the BTB consider the viewpoints of its members in Placencia before any decision is made to open up the south to cruise tourism.<sup>5</sup>

The combination of events described above builds upon longstanding public mistrust of government in Belize. During the interviews some respondents noted that high level officials have a long history of trying to ameliorate public concerns by stating that controversial development projects won’t happen, and then, against the public will, approving the same projects for which they claimed no knowledge or support. Many in Placencia see the potential expansion of cruise tourism in the south as a strikingly analogous situation. These underlying frustrations led to direct questioning of the transparency and objectivity of government officials on the issue during the first public consultation meeting in Placencia. Although the Stann Creek representative and officials from the BTB addressed the cynicism at the outset of the

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<sup>4</sup> This report references the former CEO of the Ministry of Tourism, who left the position in late 2010.

<sup>5</sup> The full statement from the Placencia Chapter of the BTIA is included in appendix 1.

meeting by stating that “no decision had been made” to bring cruise tourism to Placencia, the level of skepticism and mistrust of those words remains high in the public sphere (see section V below).

**Key finding:** *Stakeholders on all sides of the issue feel they do not have enough information from the private developer to properly evaluate the benefits and drawbacks of expanding cruise tourism to southern Belize.*

Numerous respondents expressed frustration at the lack of specific information on the proposed cruise terminal and tourist village in Placencia and, more generally, the prospect of establishing cruise tourism throughout the south. Much of this concern lay in the fact that many felt an evaluation of the issue is precisely what was being requested through the public consultation process, and they were therefore not prepared to provide an informed response. When asked what information should be made available, the most common responses centered on three issues:

1. The scale of proposed cruise tourism. Respondents consistently inquired as to the size of ships being considered for the area. How many passengers would these ships bring? What would be the frequency of visits to the region? In turn, many requested detailed information on the actual plans that RCCL—partnering with private developers that purchased land near Placencia Point—has for development in the southern Belize region.
2. A case study of lessons learned in Belize City. As noted above, Belize City has become a flashpoint for how many view and judge the value of cruise tourism in Belize. The situation assessment revealed widespread interest yet limited understanding of how GOB and the private sector are collaborating to address problems that have festered for years in Belize City. These same respondents want to know how lessons learned will help prevent similar problems and challenges if cruise tourism expands to the south.
3. Ongoing public consultations. This request is rooted in the desire of a majority of respondents to see the BTB approach collaboration with the private sector in a way that is honest, transparent, forthcoming and substantive. Several respondents requested ongoing consultations on cruise and other tourism development issues with the BTB. Specific questions related to this interest included the following:<sup>6</sup>
  - *“What is the actual plan for expanding cruise tourism in the south?”*
  - *“Will the BTB collaborate with communities to increase understanding of Belize’s cruise policy and how the industry works so people can make informed choices about future development?”*

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<sup>6</sup> Many, though not all, information requests were framed as questions. For consistent presentation and readability, minor editorial revisions have been made to list all requests in question format.

- *"How does cruise tourism align with the goals and direction for the country as articulated in the Tourism Master Plan?"*
- *"Will the cruise lines honor conditions set in place by local communities in order to effectively manage and control cruise tourism? And will government support us in this kind of effort?"*
- *"Which sites in the region will be opened to visitation by cruise passengers and will an analysis be conducted as to what the impacts to these sites will be, whether positive or negative?"*
- *"How will social and environmental impacts be controlled, managed and monitored?"*

The remaining questions and information requests made by respondents during the situation assessment included the following:

- *"Can an analysis of real economic impact be conducted, particularly comparing the financial and employment multiplier effect of cruise versus overnight tourism?"*
- *"Can a detailed analysis of both pros and cons of cruise ship tourism be provided, because it's hard for us in the community to see that any form of cruise tourism is sustainable?"*
- *"Who will provide information on the smaller 'niche' ships so we can understand the clientele and plan tours accordingly?"*
- *"Who are the investors behind this proposed development and what is the CEO's role in promoting the project?"*
- *"What level of involvement does the Stann Creek representative have in this proposed cruise development?"*
- *"Will the cruise lines provide information on what qualifications operators must possess in order to secure contracts?"*
- *"What information is available that provides an analysis on infrastructure needs required to support cruise tourism?"*
- *"What background information can be provided on the development area being considered (habitat, fragility, protected areas etc.)?"*
- *"Can a SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats) be conducted to determine if cruise tourism is either beneficial or detrimental to the south?"*
- *"Will the BTB share information or sponsor peer exchanges so that southern residents can better understand why tour operators and guides in San Pedro united to reject cruise passenger visitation at the Hol Chan Marine Reserve?"*
- *"Can more information be provided which enables southern citizens and residents to determine if this is an 'exclusive industry' or not?"*
- *"What information can GOB provide to ensure that our communities will remain safe and secure if cruise tourism comes?"*
- *"What information can be provided on tourism development options other than cruise?"*

**Key finding:** *Among stakeholders who express an interest to learn more and possibly cultivate small scale cruise tourism in the south, there are many conditions required to meet that interest.*



Marine tours at Laughing Bird Caye National Park

While situation assessment interviews revealed widespread resistance to cruise tourism in the south—specifically a model of mass tourism—there is significant interest among many tour guides and some operators to learn more about the potential for developing a market that caters to small cruise ships. Much of this curiosity is driven by the rapid decline and subsequent unpredictability of tourism arrivals since the 2008 global economic recession. Tour guiding is a well respected and commonly sought after profession in Belize, yet it has, especially during the slow season, become ever more challenging to find consistent year round guiding opportunities in Placencia, Punta Gorda and other nearby villages and communities.

When asked to identify opportunities and needs in the management of cruise tourism in Belize, guides often stressed that the size of ships and amount of visitors must be small, moderated and controlled if the industry moves south. Furthermore, the industry cannot be exclusive wherein the vast majority of profits simply go to cruise lines and developers of a “tourist village” in Placencia. In addition, many guides described a preference for leading intimate tours with small numbers of visitors, and expressed concern that anything but small cruise ships could change the nature of the product they offer and for which they are most skilled. A number of operators and guides noted that various types of small ships, usually carrying around 100 passengers, had in years past visited the waters in and around Dangriga, Placencia and Punta Gorda. Some believe that this type of small scale cruise tourism could be cultivated in a sustainable way, yet a few operators who had experience working with these ships offered mixed reviews on the level of positive economic impact and diffusion of benefits realized from their presence in the area.

Similar to other critics of a mass tourism model, many guides believe problems and challenges associated with cruise tourism in Belize City must be addressed so that lessons learned can inform any future expansion of the industry. Furthermore, tour guides, perhaps more than any interest group, articulated numerous conditions that need to be in place if cruise tourism on any scale is developed in the south. These conditions generally focused on the following five issues:

1. Spread benefits and sustainable economic development opportunities. Many tour guides expressed a desire for government to work closely with

communities in the south to ensure that any potential expansion of cruise tourism benefits the largest number of Belizeans possible. Conversely, one tour guide summarized the resistance to an exclusive industry by stating that, “we are not interested in competing for crumbs. We want to know there will be real opportunities. If there are not, then we are not interested.” A number of guides requested openness on the part of RCCL and other cruise corporations to meet locally designed conditions that benefit the largest number of southern operators and guides as possible, but also ensure minimal impact on the overnight sector and protect the ridge to reef resources that are the foundation of the tourism industry.<sup>7</sup>

2. Create incentives for small business development. Some operators and guides expressed frustration that foreigners regularly receive more government incentives for business development than do local Belizeans. A few expressed a desire to build competitive tour operations and noted that government can and should play a role in providing assistance. Many specific incentives were suggested, including reduced interest rates on bank loans, duty free concessions, discounts on the purchase of boat engines, and lower overall tax rates among others.
3. Strengthen standards and training programs. While a robust Tour Guide Training Program has been in existence for several years in Belize, some respondents—particularly those directly involved in tour operations and guiding—suggested that the program be updated and strengthened. Several cited a need for more effective standards and consistent training of guides to ensure proper management of visitors and thus sustainable tour operations. Without proper training and behavior by guides, some acknowledged, sensitive sites could be negatively impacted by an influx of cruise visitors. A few suggested development of parallel training programs that foster improved entrepreneurial, business development and financial management skills among operators and guides.
4. Identify and develop new tour sites. Some operators and guides based in Placencia and Punta Gorda highlighted opportunities to identify and develop new tour sites such as caves and hot springs. However, these same respondents noted that the private sector needs assistance from government to do this effectively and in a sustainable manner. Many feel that new product development may enrich the experience of visitors in the area and therefore attract more investment, tour operations and guiding opportunities.
5. Conduct carrying capacity studies. Many tour guides, and some other respondents, identified a need to better understand how much and what kind of visitation the natural and cultural attractions of southern Belize can handle before incurring unacceptable levels of degradation. While these types of

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<sup>7</sup> A formal statement by the Placencia Tour Guide Association (PTGA) is included in appendix 1.



studies have been proposed in the past, a number of respondents pointed out that, for the most part, this effort still needs to be undertaken for much of the south.

Although a significant number of guides expressed interest in small scale cruise tourism, most commented that they do not want new employment opportunities to come at the expense of damage to their natural and cultural heritage—what respondents unanimously consider the most valuable tourism assets of the region. However, several guides and other respondents also noted that the long-term success of conservation and resource protection in Belize is intricately linked to creation of employment opportunities that benefit people living in the vicinity of protected areas and popular tourist attractions. Many described guiding as precisely this type of opportunity. Finally, of the tour guides and operators that expressed curiosity about small-scale cruise tourism, it is important to note that they, like many other respondents, see the need for additional planning and consultation between government and the private sector to ensure sustainability and local benefits of any future development. In the words of one guide, “we are not necessarily saying yes, but we are interested to learn more. However, if we can’t get our conditions met, we are willing to say no to cruise tourism.”

**Key finding:** *There is widespread interest among stakeholders throughout the south to engage in collaborative planning with the BTB, Ministry of Tourism and other government agencies that aims to solve the most pressing tourism development challenges of the region.*

Many respondents consider the absence of a functioning Tourism Master Plan to be a root cause of the major threats and challenges facing the industry today. Several noted that this is the context—lacking the benefit of a national vision, set of goals and framework to shape decision-making—in which government officials, the private sector, and civil society have all had to react to the Placencia Point proposal. In light of these circumstances, many suggested that threats posed to the ridge to reef resources that sustain tourism are simply a consequence of ineffective government planning, control and management of development activities, all underscored by a lack of public/private sector collaboration. In the words of one respondent, “the greatest threat is that we are ill prepared for too much development and too many people too fast. Our communities and resources suffer for that.”

Some respondents also noted that different ministries and departments often fail to align goals and strategies, which results in an environment of policy incoherence and fragmented implementation of development planning. For example, many highlighted how infrastructure investment is sorely needed and would bring immediate benefits for tourism. However these same respondents complained about the lack of cooperation—specifically between the Ministry of Works, the Ministry of the Environment and the Ministry of Tourism—to achieve adequate investment and effective planning. As Belize seeks to develop its resources and create economic

opportunities, noted one respondent, “we need a cohesive process that creates seamless coordination between all levels of government and the private sector associations, supports information sharing, and identifies opportunities to work together on critical development issues.” Such collaboration, many believe, will provide a “bottom-to-top and top-to-bottom” approach that catalyzes civic engagement and buy-in to tourism policies, educates the public to make informed decisions, and strengthens partnerships between private sector associations and government.

Finally, the ongoing dialogue on potential cruise tourism development in the south has uncovered stakeholder concerns and interests that go beyond the scope and considerations of the Placencia Point proposal and look more broadly at tourism development as a whole. As previously mentioned, many respondents support core elements of the newly published Action Plan, and eagerly await the guidance and recommendations of the Tourism Master Plan. However, it is



View in the Cockscomb Basin Wildlife Sanctuary

problematic that, in the words of one respondent, “the potential for establishing cruise tourism in Placencia represents a big stain that could undermine the ambitious goals set forth in the new Action Plan.” Viewing economic development issues through a wider lens, another respondent lamented that, “Belize does a lot of good planning, however, we are less successful at actual implementation of our plans. In the meantime, we are losing some of our most valuable tourism assets and causing unnecessary conflict.” These statements underscore how a “top down” approach to introducing cruise tourism in the south has fueled mistrust of government actions and private development interests, yet simultaneously catalyzed previously unseen civic engagement. In order to move forward, noted one respondent, “we need to have less fighting and more cooperation. There is a lot we can do if we just work together, because ultimately tourism development is more about what is good for Belizeans than what is good for the cruise lines.”

## **V. RESULTS OF THE PUBLIC CONSULTATION MEETINGS**

Seatone Consulting collaborated with the BTB and Ministry of Tourism to facilitate a total of three public consultation meetings on cruise tourism subsequent to the situation assessment. Meetings were convened in key communities that may be impacted directly or indirectly by the proposed cruise project in Placencia. The communities included Placencia (October 22<sup>nd</sup>), Punta Gorda (November 29<sup>th</sup>) and Dangriga (November 30<sup>th</sup>). The meetings represented the second and final public component of the consultation process.

Each meeting began with opening statements by the Chairman and Director of the

BTB that explained the purpose and rationale for the public consultation process. The facilitator then conducted a simple values exercise with audience members to frame the discussion. Following this exercise, a presentation on the proposed project was provided by a representative of the private development group—and in the case of Placencia, the Vice President of Commercial Development for RCCL. The remainder of each meeting consisted of back and forth discussion where citizens and residents were able to express their viewpoints on the proposed project and ask questions of the private developer, cruise line representative (in Placencia) and government officials. The narrative below reflects a record of proceedings for the three meetings. In line with the design of the consultation process as a social study, individual names are left out of the narrative.

The collective results of the meetings confirmed key findings of the situation assessment and revealed significant concerns on a host of issues related to the potential introduction of cruise tourism in the south. In Placencia—the center of the proposed development scheme—the meeting dynamic was dominated by negative perceptions of the cruise industry and mistrust of government actions leading up to the public consultation. Meetings in Punta Gorda and Dangriga realized similar sentiments about the cruise industry, but also experienced more in depth discussion between the public, government officials and private developer that focused on the need to promote economic growth that ensures direct benefits for local Belizeans. Of note, many individuals and groups throughout the region demonstrated outright opposition to cruise ships in the south, and articulated numerous reasons to support their skepticism and resistance.

Across the board, citizens and residents throughout the south repudiated the concept of a “tourist village within a tourist village” as this, in the view of many, typifies the exclusive and consolidated nature of the cruise industry—what many consider a problematic element of mass tourism models of development. Some showed interest in cultivating a market for small ships (e.g. <500 passengers) but emphasized the need to spread economic benefits, ensure local operational control and improve management of the sector in Belize City prior to considering geographic expansion or new port designations. Finally, several meeting attendees expressed frustration at the limited amount of information provided by the private developer, and thus felt ill prepared to offer an informed evaluation or recommendations on the issue to government officials.

### *Placencia*

The geographic focus of the proposed development—Belize’s Punta Placencia Cruise Tender Arrival Area and Village—provided the impetus and rationale to conduct the first public meeting in Placencia. At the outset, the meeting facilitator welcomed all attendees, recognized dignitaries, and introduced government officials at the head table, including the Chairman and Director of the BTB, the CEO of the Ministry of Tourism, and the legislative representative of the Stann Creek District. The facilitator subsequently introduced the Vice President of Commercial Development for RCCL as well as a representative of the private development group that purchased land at

Placencia Point. Finally, the Chairman of the Placencia Village Council was recognized and offered brief comments in which he stressed the importance of any decision made during the meeting.

The Stann Creek Representative and the BTB Chairman acknowledged cynicism surrounding the issue during opening statements and assured attendees that government had made no decision to approve cruise tourism in Placencia. The Chairman described the development of whale shark guidelines in the area as a precedent for stakeholder collaboration that resulted in a highly organized marine tourism sector and a well-managed resource. He emphasized the BTB's commitment to the consultations and the right of people in Placencia to make an informed decision on cruise tourism. He acknowledged that the high level of attendance—approximately 400-500 people—demonstrated the importance of the issue to the community. The Chairman concluded by highlighting how the BTB had hired an impartial facilitator to lead the public consultation process and noted that any decision or recommendations made by the community would inform how the BTB hopes to move forward.

The Director followed and initially emphasized that the BTB works for the people of Belize. She pointed out how the Placencia proposal is not a BTB project, but rather had been presented to the Cabinet of Ministers by a consortium of private developers. She announced the recent publication of the Action Plan as the culmination of a collaborative effort that involved input from more than 50 stakeholders across the country. She then described how cruise tourism has been overlooked for many years in Belize and that the BTB has renewed capacity and political will to improve management of this sector. She provided an overview of some of the changes taking place at the newly designated Fort George Tourism Zone (FGTZ), including new regulations designed to create orderly development, improve vendor facilities, reduce traffic congestion and increase security. She stressed BTB's moral responsibility to help communities make informed tourism development choices and explained the consultation as part of the process to assist southern communities in assessing the viability of an additional cruise port in Belize. Finally, she described how the assessment would produce an independent report for the Cabinet of Ministers and also inform the ongoing work of the STP as it seeks to understand and recommend the best tourism growth scenarios for Belize—including the technical analysis of the cruise sector.

Following opening statements, the facilitator conducted a simple visioning exercise with audience members. The primary objective was to frame the conversation within the perspective of what stakeholders consider the major tourism assets and values of the region, and subsequently discuss how cruise tourism may or may not fit into such a value system. During the exercise, several meeting attendees identified what they consider to be unique and authentic attributes of the Placencia Peninsula and surrounding area. Several pointed to the friendly, laid back nature of the people, and emphasized how tourists commonly get to know and make bonds with locals during their visit to the area. Others cited beautiful nature—from ridge to reef—and all the

amazing tours and experiences these resources afford for locals and visitors alike. Many noted the small scale, low-density development and population of the area—what is described by some as “Barefoot Perfect.” Still others highlighted the economic and ecological value of the many protected areas that span the entire southern region.



The Belize Barrier Reef

Subsequent to the visioning exercise, a representative from the private development group that purchased land at Placencia Point presented information about the proposed plans for the area. The presentation was offered as a response to the many information requests recorded during the situation assessment interviews. The developer spoke first about his group’s interest in the area. He was followed by the RCCL representative, who gave a longer power point presentation that highlighted trends in the industry, provided information on RCCL’s fleet of ships, and showcased draft schematics for the proposed development in Placencia.

In his brief comments, the developer described how the project concept came about as an idea to showcase Placencia as a maritime center. His group is interested to create a boutique development that is higher end, small, and tasteful. He emphasized that the developers are open to hearing ideas from the community and thus are supportive of the consultation process. He encouraged attendees to consider the potential benefits that cruise visitors may bring to Placencia and the surrounding communities. Finally, he expressed a desire to clear up any misconceptions about the project, noting that his group is not interested in a mass tourism model of development.

At the outset of the next presentation, the representative from RCCL extended his thanks to the audience and expressed pleasure at being invited to the meeting. He briefly described his worldwide port development work for RCCL and their interest to look for additional opportunities in Belize. He harkened back to opening comments that no decision had been made on the development to date. The proposed high end, boutique development in Placencia represents an idea brought to RCCL based on his understanding of these kinds of development projects. His opening comments were followed by a power point presentation that provided information about RCCL’s ships and itineraries; Caribbean market trends and statistics; seasonality of the industry; and finally—as he was pressed to complete his presentation by a crowd impatient to voice their concerns—the schematics of the proposed Placencia project.

The facilitator described the remainder of the meeting as an open discussion wherein attendees could express their viewpoints and ask questions of the developers or government officials. He reminded everyone that the meeting afforded the public an opportunity to influence the decision-making process. He asked attendees to take the

presentations into consideration and comment on how cruise tourism might develop in the area, and whether or not it fits within their value system and compliments the existing tourism product they offer.

As open discussion began, initial comments—similar to findings of the situation assessment—focused on the fear of mass tourism and government’s role in apparently promoting Placencia as a cruise destination. One attendee stated that the future of Placencia is ecotourism, and questioned why the CEO invited RCCL to potentially develop what many consider a model of mass tourism. The CEO said he interacts with principals of all the cruise lines and had invited RCCL to come look at whatever potential Belize has to cultivate growth in the sector. Acknowledging people’s concerns about Belize City, he emphasized that cruise tourism cannot be turned back, but instead Belize can improve how the sector is managed and controlled. He stressed that southern Belize may afford opportunities to create a boutique cruise sector that spreads tourists over a large area and thus limits impacts to overnight tourism. He concluded by emphasizing that Belize must be prepared for future growth and that includes managing cruise tourism.

Additional early comments and questions from the public focused on the scale of cruise tourism being proposed; the frequency of arriving ships; the numbers of passengers; and potential impacts on the existing overnight sector in Placencia. A number of attendees expressed concern—based on the power point presentation—that cruise arrivals would be highest at the same time as overnight arrivals, namely November through March. Some expressed frustration at government’s inability to pass bi-laws, conduct arbitration, or properly manage the number of ships and passengers in Belize City and the dumping of grey water along the reef as ships depart. Many comments throughout the meeting targeted problems and challenges associated with cruise tourism in Belize City, thus validating a key finding of the situation assessment.

In response to these concerns, the Director described the BTB’s role in relation to management and control of the cruise sector. She reminded the public that the accommodation tax is used to market Belize, and that the recently published Action Plan targets issues and challenges that have gone unaddressed for many years—including proper management of the cruise sector in Belize City. She also emphasized a renewed focus on Belize’s competitiveness in the context of a global market, and how quality assurance improvements and renewed destination planning are central goals of the new Action Plan. Later in the meeting she pointed out that the cruise viability assessment (the source of this report) is looking at the Placencia proposal from a social standpoint, whereas Belize cruise tourism in general is being closely evaluated by technical teams working on the Tourism Master Plan. She reminded the audience that the independent report of the cruise viability assessment would be forwarded to the Cabinet of Ministers and also shared with senior staff of the STP.

At one point both the Director and CEO were challenged about GOB’s apparent role in promoting Placencia as a new cruise port of call for Belize. One attendee complained

that a last minute language change in the Action Plan suggested government officials were being less than fully transparent and honest about the consultation process. The Director pointed out that the Action Plan stated how BTB would consult with communities to assess the viability of cruise tourism in southern Belize. The attendee replied that that was what the final version of the Action Plan said, though not the initial draft circulated for editorial feedback. The Director then re-stated how the consultation process is meant to help the community to identify and share considerations that should be brought into the decision making process. She emphasized that the BTB board and staff include professionals with a strong grounding in conservation and a commitment to the sustainability of destinations in the south.

The attendee went on to question the sequence of the consultations, specifically why a developer would purchase land first, and subsequently collaborate with GOB to hold meetings with the public. He feared that this illustrated how the project may already be a done deal. He went on to question whether or not the CEO—as a former executive and current shareholder at Century 21 Real Estate—had a conflict of interest and thus could not provide objective recommendations on the proposed project. The CEO responded by pointing out that he had invited RCCL to the region, and that no conflict existed because he resigned from Century 21 Real Estate prior to accepting the CEO position. He went on to describe how the Cabinet of Ministers will make the final decision on this proposal and that his job is the movement of information. As a response to receiving the proposal, the Cabinet of Ministers mandated that the BTB conduct public consultations and the Department of Environment (DOE) assess environmental concerns associated with the plan. In addition, he noted that the Cabinet of Ministers requested that the BTB consult with the Port Authority in order to understand the legal ramifications associated with ships arriving in the south.

Following this exchange with government officials, several questions were posed regarding the land sale, and the timing and method in which development schematics were shared with the public. One attendee questioned why a consultation process was planned long after land was purchased and plans drawn up, thus again highlighting the fear—articulated by many during the situation assessment—that cruise tourism in Placencia had already been approved by government and that RCCL and private developers would be the primary beneficiaries. In addition, if RCCL planned only for small ships in the area, then how, it was asked, would citizens and residents of Belize have assurance that ships of a much larger size and class would not eventually come? The representative from RCCL was also asked to comment on the company's environmental record, though no response was offered for either of these questions.

Throughout the open discussion, several attendees expressed concern about the proposed development at Placencia Point—what was perceived and repeatedly described as a “tourist village within a tourist village.” One attendee requested the definition of “boutique” and asked how much money typically stays within such a private development versus trickling out to the wider community. In addition, he

expressed concern about duplication of stores and restaurants that already exist in Placencia and cited Roatan as an example where this has happened. Why, he asked, build a village within a village? The private developer, in turn, described boutique hotels as higher end, with more “bells and whistles” and thus potential to be sold at a higher rate. The specific question about diffusion of profits into the community went unanswered, but the developer insisted that there is no plan to make the area exclusive or inaccessible to the local community. As discussion continued, many attendees—representing different backgrounds and interests—expressed disapproval of the tourist village development concept.

A number of tour guides expressed tentative interest in potential employment opportunities that may come with cruise tourism, but also posed a number of questions. If cruise tourism does come, said one self-described guide, it must be small in scale and reflect an extension of the tourism product that guides already offer. He insisted on widespread benefits and local control of the operation, a theme touched upon by many during both the situation assessment and throughout the meeting. He said many tour guides welcomed small, sustainable design with local control, but had reservations about what was being described by the project developers. And like other stakeholders, several guides expressed disapproval of the tourist village development concept. One wondered aloud what impact an influx of cruise visitors would have on the fly-fishing industry. Tour guides are willing to work collaboratively with the BTB, said another self-proclaimed guide, in order to come up with a sustainable design that incorporates local control. Late in the meeting, however, another guide implored GOB to go back to the drawing board and get the sequence of consultation correct so that community support can be gained for projects like the one being proposed. He emphasized that Belizeans want to be entrepreneurs and not simply day laborers, but that current economic challenges were making it harder for many to achieve that goal. Some guides approached the facilitator after the meeting and expressed similar viewpoints to those described above.

As the meeting drew to a close, one attendee asked what would happen if Placencia residents decided they did not want cruise tourism or the proposed dock and tourist village. He inquired as to whether or not cruise tourism would simply move to another location such as Punta Gorda or Dangriga. The Director again emphasized that the cruise viability assessment for the Placencia proposal was distinct though not unrelated to the technical analysis on cruise tourism being conducted in the context of the Tourism Master Plan for Belize. This consultation, she emphasized, will inform the work of the STP, and contribute to an evaluation of and recommendations on potential growth scenarios for cruise tourism in Belize. Shortly thereafter—and again in response to a question about what will happen if people in the south do not want cruise tourism—the Chairman stated that if the people do not want it, then it will not be forced on them.

The meeting concluded with a brief discussion on next steps. In response to a request made by an attendee, government officials stated plans to share the independent report with the public prior to submission to the Cabinet of Ministers. The Chairman



of the Placencia Village Council spoke briefly and requested that the BTB help the destination strengthen its overnight sector before considering cruise tourism for the region. Finally, the Director thanked the audience and encouraged people to continue participating in consultations that inform the development of the Tourism Master Plan, and thus the future of the tourism industry in Belize.

### *Punta Gorda*

Due to the occurrence of Hurricane Richard, meetings in Punta Gorda and Dangriga were delayed until late November. Similar to Placencia, the Punta Gorda meeting was well attended and realized participation from approximately 200 members of the community and surrounding villages. The same meeting format was used, wherein government officials provided opening statements on the purpose and rationale of the meeting, and the facilitator followed with a simple visioning exercise to frame the discussion on cruise tourism within the context of local values and perceived assets of the region. The developer briefly described the proposed project and the remainder of the meeting involved open, back and forth discussion between audience members, government officials and the developer.



The entrance to Punta Gorda

At the outset, government officials reaffirmed the purpose of the consultation process and ensured audience members that there was no “done deal” regarding development of cruise tourism in the south. The Chairmen highlighted public participation as a critical component of a successful decision-making process, and emphasized that the meeting could serve as a platform to look at the needs of Punta Gorda and surrounding communities. The CEO announced that he would be moving to a new position as Executive Chair of the Investment Development Unit. He informed the audience that his position at the Ministry of Tourism was going to be replaced by the current BTB Chairman. He also announced the new Chairwoman of the BTB, Marketing Director and southern representative. The Director concluded opening statements by emphasizing that the project under discussion was submitted to GOB by a consortium of developers. She highlighted BTB’s newly launched program to improve orderly development of cruise tourism in Belize City. She then described the consultation process as an information data point that demonstrates the BTB’s commitment to an open, transparent process wherein stakeholder viewpoints and concerns inform ongoing development of the Tourism Master Plan.

Following opening statements, the facilitator again conducted a simple visioning exercise. When asked to consider the major tourism assets and values of the region, meeting attendees emphasized how the Toledo District has a lot to offer visiting tourists—a ridge to reef setting of natural resources, ancient relics and authentic culture. Similar to Placencia, a number of attendees noted that it is the people of the

region who are the energy and inspiration behind the tourism industry. One attendee pointed out that in some ways the region's resources have yet to be fully inventoried, and that this should be explored to determine what additional visitor attractions can be offered. Others emphasized high species diversity, low human population, and how geographic location makes the area a good "hub" for tourism development and visitation from all directions. Finally, one attendee expressed concern that the visioning exercise was too elementary, and it was imperative that the discussion move toward the cruise issue in order to maximize available meeting time.

At this stage the developer introduced the proposed Placencia project. In an effort to avoid the critical response that came from a long power point presentation at the Placencia meeting, the developer limited his presentation to less than a dozen slides. He spoke of his group's vested interests in Belize and described the fundamental components of the project concept. As in Placencia, he stated that his group has no interest in a mass tourism model of development. He presented some of the slides which had been shared by the RCCL representative, highlighting his group's interest in cultivating a market for ships carrying anywhere from 200–900 passengers. He described the target market as high-end tourism where customers appreciate new places with small-scale tours and typically spend more than the average cruise visitor. He acknowledged that several small cruise ships had visited the area in years past, and expressed an interest to enhance that market.

The facilitator subsequently reminded audience members of the meeting's central purpose—to identify key issues and considerations that government needs to factor into decision-making as it evaluates the Placencia proposal and cruise tourism in the south more generally. As open discussion began, the first line of questions reflected disappointment in the developer's presentation. One attendee stated that the proposal was vague, and thus its main elements and potential impacts were difficult to understand. She expected that the developer would elaborate on specific points, and requested additional information and greater explanation of the project in order to provide an informed response. The developer responded that it could take as long as two or three years of marketing before the first ship came to the area, and that the project is currently in the conceptual stage.

Another attendee didn't understand why a Placencia proposal was being discussed in Punta Gorda. Government officials pointed out that tours generated from Placencia-based cruise traffic could affect nearby communities. As such, the BTB felt it was important to consult all potentially impacted areas. They again stressed that community involvement is needed to identify social considerations, environmental impacts, and opportunities for the southern region as a whole. The developer followed by acknowledging the need to engage and study the region, and embraced the public consultations as a critical component of this process. One attendee who had also been at the Placencia meeting expressed frustration at the developer's comments. The presentation, he said, lacked clarity as to whether the development would be a "tourist village" or a "maritime center" to which the developer again responded that at this stage the concept can be adjusted with public feedback.

Shortly thereafter, a number of questions and concerns were posed directly to government officials. In its attempt to secure “community-based considerations” about the proposed project concept, one attendee asked what “non-community considerations” GOB was looking at. He wondered if the consultation process simply represented “lip service” and an attempt to ameliorate public concerns. He went on to suggest that the size of the audience reflected more concern about threats rather than opportunities that may come with cruise tourism. He specifically asked what criteria will guide the decision making process and how much weight would be given to feedback received from communities in the south. As in Placencia, the Director responded by describing the consultation process as one data point of information, whereas technical teams working with the STP were simultaneously researching appropriate growth strategies for cruise tourism in Belize. She stressed that community feedback is equally valuable in comparison to ongoing technical research. The CEO also responded by pointing out the challenge of improving management and control of cruise tourism in Belize City, where no pre-development consultations with the public took place. This new project, he said, may have potential to create jobs, but could also bring negative impacts to the area. He noted that the current government is therefore conducting the cruise viability assessment to ensure that any development is beneficial to local communities.

At this stage of the discussion one attendee welcomed the public consultation process. He acknowledged widespread resistance to the Placencia project but also pointed out that there are more than 50 members of the local tour guide association that need job opportunities. He expressed concern about big cruise ships, and asked why develop a “tourist village within a tourist village.” Tour guides, he said, would like to see economic growth, but not at the expense of damage to the region’s natural and cultural resources. Similar to findings of the situation assessment and some comments made at the Placencia meeting, he said there is significant concern in his community about exclusive development that benefits only a small number of businesses. He stated that if local operators and tour guides can work directly with any cruise lines that come in, then there may be an openness to discuss the issue.

The facilitator subsequently requested that the developer address public concerns about exclusivity, the tourist village development concept, and the interest expressed by many to see widespread benefits if cruise tourism comes to the area. In response, the developer stated that the Placencia proposal is in no way meant to be exclusive. He also agreed with previous sentiments that there is no need to duplicate already existing businesses in a tourist village. However, he also said that if something new is added to the community, it should be designed as a “win-win” for everyone. He reminded the audience that the purpose of the Placencia project is to cultivate higher levels of visitor traffic so that tourists can enjoy the types of tours offered in the area—the profession for which local people are well skilled.

One attendee, also present at the Placencia meeting, pointed out that 200–900 passenger ships is a large range to be considering. She said many questions remain unanswered, including concerns about the frequency of arrivals; the amount of trash

generated; the use of tender boats that carry up to 400 persons; and the contractual requirements for local operators seeking business with visiting cruise ships. She expressed frustration that the development proposal had not provided any specifics that address these important issues. She then requested that audience members consider these issues, as well as whether or not adequate infrastructure and controls existed to manage the level of visitation being proposed. When the facilitator asked the developer to respond, he pointed out that negative perceptions were getting ahead of the proposed development, and that fear does not help the process. He again reminded the audience that nothing about the proposal is concrete, and that collaborative planning can address traffic flow and other issues.

Along the same chain of conversation, one attendee expressed frustration at the negative perception of cruise tourism that had arisen during the cruise viability assessment. He felt the consultation process had been “hijacked” by those critical of cruise tourism. At the same time, he acknowledged the difficulty of negotiating with the cruise lines, and agreed with others that the developer must address questions raised by the public. Similar to comments made during the Placencia meeting, he implored government officials to create opportunities for Belizeans to be entrepreneurs and not just day laborers. He reinforced a key finding of the situation assessment by pointing out that locals need to be empowered to set conditions for how cruise tourism might occur in the south. He went on to express disappointment in how GOB provides more business incentives to foreigners than to local Belizeans, and concurred with several others that there should be no “tourist village within a tourist village.” Finally, he asked if the proposal would move to another district in the south if rejected by the public in Placencia.

The Director responded by again pointing out that the cruise viability assessment, combined with the ongoing development of the Tourism Master Plan, would inform Belize’s national development strategies by identifying the best future scenarios for sustainable tourism growth. The CEO followed by addressing the issue of exclusivity and local empowerment. He acknowledged that as tour operators and resorts in Belize have grown—both in cruise and overnight tourism—some consolidation of the industry has occurred, and this has hurt independent operators and guides. He reminded audience members of existing laws that are meant to protect Belizean interests, including the prohibition on cruise lines operating gift shops while in port, conducting their own tendering, and facilitating their own tour operations. The Chairman followed by pointing out that GOB is reviewing the Placencia cruise proposal submitted to the Cabinet of Ministers. He acknowledged the need to ensure sustainability of any development, and reaffirmed interest—expressed by some during the situation assessment and public meetings—to conduct an inventory and carrying capacity study of the region’s natural and cultural resources. He suggested that cruise tourism might be one of several options that could fill gaps in visitation, but stressed that marketing the overnight sector would continue to be a priority of the BTB.

The discussion at this stage again turned to frustrations held by many attendees with

both the proposed development and the process of public consultation. One attendee said he could not understand how Punta Gorda would benefit from a development in Placencia, while others said the project concept remained unclear and significantly more information was needed for the public to make informed recommendations to government on the issue. Another expressed tentative hope for the jobs that cruise tourism might bring, yet simultaneously pointed out how he has seen small cruise ships in the area leave garbage, cut down mangroves and operate in a way that is unsustainable and does not benefit local people.

One attendee posed several questions to the developer and government officials. He felt tourism development had missed the extreme northern and southern parts of the country. He was encouraged by the consultation, and noted that critical importance of management and control—things that have been elusive with the cruise industry in Belize. In considering the problems in Belize City, he inquired about what government would do differently in Punta Gorda. And like others, he rejected the tourist village concept. He lamented how the cruise lines brought in their own operators in Belize City because Belizeans did not have adequate standards and quality assurance. In contrast, he applauded the development of whale shark guidelines as an excellent example of collaboration and effective management of tourism activities. Finally, he reminded the developer that many unanswered questions remained about issues of exclusivity, RCCL's true involvement in the project, and how development in the south would learn and apply lessons from mistakes made in Belize City.

The facilitator restated many of the questions and concerns to the developer and requested a response. Regarding RCCL, the developer said only that they would like to be involved in the project. He pointed out, however, that RCCL represented merely an "arm" and that "the body can still function without the arm", thus insinuating that involvement of the cruise lines was not necessarily required to make the project a success. He agreed with many comments that lessons must be learned from Belize City and again stressed that the village concept is meant to be open and not exclusive. Government officials from the BTB and the Ministry of Tourism followed by pointing out the one-sided nature of the original agreements with cruise lines in Belize. This process was flawed, they said, and cannot be repeated.

Government officials continued by emphasizing the renewed effort to bring more orderly development in Belize City, and that no doubt lessons learned can be applied if the industry expands to other locations in Belize. The Director specifically requested that the public stay informed of the BTB's efforts in this regard. She again emphasized how creating a better experience in Belize City may result in cruise visitors coming back to make overnight trips in different destinations across the country. Finally, the CEO stressed that there can never be another exclusive tourist village development concept, and any future expansion of cruise tourism must allow open access and free market competition.



Mayan women of southern Belize

One attendee commented that residents of Punta Gorda Town had previously conducted a feasibility study on cruise tourism which determined—based on small ships visiting the area—that cruise visitors spend very little money once they disembark. She inquired about how these visitors could be kept around longer and convinced to spend more. She went on to question whether the

area was even prepared for cruise ship tourism. What business, she asked, is currently prepared take large numbers of visitors on their tours; where is the infrastructure such as bathrooms, garbage disposal, road improvement and busses; and how will carrying capacity be determined at the area's most valuable sites? She expressed concern that the Toledo district may not realize any benefits if proper infrastructure and capital investment is not in place to support cruise tourism. She said the area could perhaps handle ships carrying 100-200 people, but she remained skeptical about anything bigger than that. In response to these concerns, the CEO pointed out that the revenues from tourism visitation enable the National Institute on Culture and History to enhance infrastructure, management and control of popular cultural attractions. He stressed, however, that it is often difficult to make site improvements without revenue streams generated by regular visitation.

Another attendee encouraged audience members to hold government accountable to its actions and agreements with developers and the public. He, like others, pointed to the lack of consultations and planning prior to allowing cruise tourism in Belize City. To learn from this, he said, citizens and residents must demand transparency from both government officials and any development interests. The Chairman responded by complimenting those who bring a critical perspective to the consultation process, and noted that watchdog groups have done much good work in the past at protecting the interests of Belizeans. He again cited the precedence of collaboration that led to development and implementation of whale shark guidelines. He noted that, "when we put our hearts to it, we can get development right." He also stressed government's responsibility to ensure that any development benefits the wider southern region, and not just the proposed project area in Placencia.

Another tour guide from Placencia sought to clarify misunderstanding of comments he and others made on the issue during a television program. He said that Placencia tour guides are not necessarily saying yes to cruise tourism, but do want to learn more so as to better understand what kind of development scenario the region might be able to support. He said that tour guides who are curious about cruise tourism remain skeptical about the tourist village development concept, as this appears to epitomize exclusivity to the detriment of local citizens and residents. Finally, he stressed the importance of conducting carrying capacity studies. Such studies, he said, would allow communities to determine what type and scale of tourism could be developed

in the region that is sustainable but also beneficial to as many Belizeans as possible.

As the meeting came to a close, one attendee highlighted how several studies demonstrate that overnight tourists typically spend significantly more money than single-day cruise tourists, including in Belize. She complimented the BTB on the robust training programs it has developed and implemented over the years, but pointed to frustration held by many as tourism development has grown very slowly in the Toledo District. Similar to sentiments expressed by some at the meeting conclusion in Placencia, she requested that the BTB not give up on the overnight sector and wondered if any analysis had been conducted to determine the compatibility of cruise and overnight tourism.

The Director reaffirmed that marketing the overnight sector remains a high priority for the BTB, and described an ambitious new program that has been mapped out in the recently published Action Plan. In addition, she again emphasized how renewed efforts to improve management effectiveness and orderly development of cruise tourism in Belize City would generate lessons and new strategies that could be applied elsewhere. The CEO reminded audience members that the public is empowered to set parameters and conditions for how cruise tourism may develop in the south. Finally, the Chairman acknowledged that the consultation process represented the first step to ensure that developers respond to all questions posed by the public. If any expansion of cruise tourism is informed by public concerns and input, he pointed out, it will be better managed and may result in widespread benefits to the communities in the south.

#### *Dangriga*

Unlike in Placencia and Punta Gorda, the meeting in Dangriga realized limited participation with approximately 20 individuals present from the community. The same meeting format was used, wherein government officials provided opening statements on the purpose and rationale of the meeting, and the facilitator followed with a simple visioning exercise to frame the discussion on cruise tourism. The developer briefly described the proposed project and the remainder of the meeting involved open, back and forth discussion between audience members, government officials and the developer. Due to limited attendance, the seating arrangement allowed for close interaction between the panel of government representatives, the developer and audience members.

At the outset, government officials again reaffirmed the purpose of the consultation process and ensured audience members that there was no “done deal” regarding development of cruise tourism in the south. The Director explained the BTB’s role in contracting an independent facilitator to open up dialogue with communities in the south and identify what the implications of the proposed project would have for communities such as Dangriga. She highlighted ongoing development of the Tourism Master Plan and pointed out how the cruise viability assessment—combined with a technical analysis of future cruise growth scenarios—would inform the final plan. Similar to the previous meetings, she noted that the main objective of the assessment

is to bring the most informed set of recommendations from the public to the Cabinet of Ministers. She underscored this statement by emphasizing that the public consultation process represented the first independent study in many years, and reflects the BTB's attempt to ensure that any future cruise development is sustainable and meets the needs of southern communities.

The CEO followed and announced upcoming position changes at the Ministry of Tourism. He highlighted how all the viewpoints, concerns and frustrations voiced by the public have helped broaden government's view not only on cruise issues, but tourism development more generally. He asked members of the audience to bring ideas and suggestions for policies that take tourism to the next level in Belize. The Chairman noted that increased community buy-in ensures sustainable development and benefits the country. As in Placencia and Punta Gorda, he stressed that there is no "done deal" on cruise tourism in the south, and that GOB is willing to engage in more community consultations in order to get tourism planning and development right.

Subsequent to the opening statements, the facilitator again conducted a simple visioning exercise. When asked to consider the major tourism assets and values of the region, meeting attendees cited the slogan for Belize tourism, "Mother Nature's Best Kept Secret", and pointed to how this perfectly described much of the southern part of the country. Dangriga, many emphasized, is a very rich and secret place. One attendee pointed to healthy fishing grounds and a robust agricultural industry that produces some of the best citrus in the world. Others proclaimed that the best dive sites in Belize are found in the south. Still others noted the importance of these and other valuable tourism assets being protected in the region's marine and terrestrial reserves. Several attendees emphasized how the rich cultural heritage of the region is visible in daily life throughout Dangriga.

The developer then provided a presentation on the proposed Placencia project. Similar to Punta Gorda, the presentation was brief and offered a general overview of the concept being considered. He talked about his background in Belize and expressed interest to develop a boutique port design that is small in scale, quaint and enjoyable. As in Placencia and Punta Gorda, he specifically commented that the project design is open to adjustment based on feedback from the public. The size of ships marketed, he stated, could range in size from small to medium and include up to 1,000 passengers. He noted that approximately 40 ships of this size make up the Caribbean market. The development, he emphasized, will not be exclusive and could provide benefits to communities throughout the south by "monetizing" existing and new tourism sites in the area. Conversely, he said that the development group is not interested in what is oftentimes associated with cruise tourist villages—that is diamond shops, liquor stores and a duty-free environment.

As open discussion began, the first series of questions focused on issues of exclusivity, visitor management controls, and the proposed scale of development. One attendee pointed out the perception that Placencia villagers are against the cruise proposal.



The developer responded that his group is still in discussions with the community and there remain many questions that must be answered. Another expressed concerns about managing visitor traffic and inquired as to how this would be addressed by the developer. In response, the developer agreed that too much traffic would take away from the pedestrian friendly atmosphere in a place like Placencia. One option, he noted, could be to offload visitors at the Big Creek port, where stationed buses could then take them on tours of the area.

Another attendee talked about his previous experience with small cruise lines, and wondered if the cruise industry can ever be anything but exclusive in how it conducts business. The problem with the smaller cruise ships, he noted, is that oftentimes they simply come and use Belize's natural resources, yet require very few services from locals and spend little money while in the area. He also pointed out how it is common practice for cruise lines to identify and use only one or two operators for land and sea tours. This, in turn, results in many looking critically at these operators and wondering why benefits are not spread more broadly throughout the community. Finally, he pointed out that as a tour operator he could make better money taking out a small number of divers rather than working with the cruise lines, and that large amounts of cruise visitors often bother overnight visitors seeking a more intimate natural experience with smaller crowds. The developer responded by emphasizing that any development must strive to maximize benefits throughout the community. Furthermore, the CEO described how consolidation is efficient for the larger cruise lines, but suggested the smaller lines may be open to negotiate a different structure. He emphasized it as a lobbying process in which GOB must learn from past mistakes in Belize City. Moreover, he stressed that adequate rules and regulations to control the industry must be in place before any new permits are approved.

One attendee openly speculated that 900-passenger capacity cruise ships would destroy the fragile natural assets and cultural authenticity of the area. She pointed to a lack of infrastructure to support tourism on the scale brought by such ships. In addition, there are limited natural resources, she said, and the area also doesn't have enough people to handle this type of tourism development. Another attendee thanked government officials for conducting the consultations and expressed interest in the upcoming Tourism Master Plan. She showed concern, however, about what is considered a "small" ship, as well as the frequency of proposed arrivals. She recommended a feasibility study to better understand economic growth projections, proposed tour locations, and expected social benefits. This, in turn, she said, would allow communities to provide an informed evaluation and response to the proposed development. She lamented that limited information on the proposed development scheme made it difficult, at this stage, for communities to offer substantive feedback to GOB. Several respondents followed by expressing concern that even small scale cruise tourism could cause significant impacts to the offshore cays and coral reefs, what many consider the most valuable tourism asset of the region.

The CEO pointed out the challenge of accurately predicting cruise growth scenarios from year to year. He emphasized that it is Belize's responsibility—not that of the

developer—to determine appropriate carrying capacities for sensitive sites and popular tourist attractions in the south. The developer reaffirmed the difficulty of predicting future market trends, but suggested that Belize could perhaps set limits on how many cruise tourists could visit particular sites. While in agreement with this statement, one attendee replied that visitor limits are unfortunately not in place at many popular sites, and linked this problem to traffic concerns held by many in Placencia. The CEO suggested that a new model for managing cruise tourism could be created in the south. The Director followed by describing improvements being made in the FGTZ in Belize City under the new Action Plan. She acknowledged that GOB had fallen short on this challenge in the past, yet emphasized how the BTB is working diligently to improve management and control of the area.

One attendee insisted that GOB must consider infrastructure needs prior to expanding cruise tourism on any scale. The southern region, she said, is simply not prepared at this time. Another expressed concern about security, and what changes may come with the establishment of new cruise ports. She acknowledged that the proposal represents a different type of cruise tourism than Belize City, yet wondered if smaller Belizean operators would be adequately prepared to compete for contracts. What happens, she asked, if this venture does not work? Along the same line, another attendee asked what would happen to the overnight market if cruise ships come during the busy season. Some described how cruise ships have the option to just sail to another destination, whereas there are great risks involved for residents of southern Belize. The developer stated that the primary risks are associated with financial investment in the project, a response met with strong disagreement from several attendees in the room. He also pointed to an excess capacity of tour guides in the region, and suggested that cruise visitation may create opportunities for those without work.

Shifting direction in conversation, one attendee lamented that his tour guide association had seemingly become an enemy of the BTB by conducting trainings at the local level. This, he said, had been disallowed and therefore resulted in limited available training opportunities for aspiring guides in the area. He insisted that it is unrealistic for people to travel and stay in Belize City for the extended time period necessary to complete the training course. In response, the Director acknowledged expertise in the community and suggested that the BTB could work with local associations to review the existing ten-year old course. She emphasized that the BTB is tasked to ensure industry standards, and that strengthening partnerships and facilitating a robust training program is essential to this process.

As the meeting moved towards a close, the facilitator requested that attendees recommend next steps for the public consultation process. The immediate response—particularly considering the low turnout—was that the BTB needed to improve outreach efforts and advertising prior to conducting another meeting in the community. One attendee suggested the consultation was more appropriate for Placencia as it is the target area for development. Another wondered why such limited information was provided on the development scheme. She inquired about the stage

of the development process and what sites were being proposed for visitation. In response, the developer named several protected areas and went on to suggest that perhaps new sites need to be identified and developed. Another attendee suggested an independent study to more broadly understand local attitudes and perceptions on the issue before moving forward.

Another set of comments targeted the perceived high-risk nature of the project and limited public understanding on key issues. One attendee recommended the BTB open a sub-office in each major community to enable capacity, information sharing and local education on critical tourism development issues. Another stressed that comprehensive analysis of projected cruise impacts would enhance the consultation process. Some attendees insisted that the developer demonstrate, in clear terms, how the project will avoid creating the same problems that now plague Belize City. Unless you put specific plans and controls in place to ensure past problems are not repeated, one attendee emphasized, you will run into troubles, particularly in an environment where there is little trust in government. Finally, it was noted, Belizeans need to see and digest the recommendations of the Tourism Master Plan prior to making any decision on cruise tourism in the southern part of the country.

The Director replied to several comments by pointing out that the BTB had a unique window of opportunity to influence the Cabinet of Ministers with an independent report. She emphasized that the Tourism Master Plan will look closely at potential growth areas and necessary development requirements. The plan, she emphasized, will serve as a blueprint that identifies growth opportunities but also offers lessons learned from Belize City. In this context, the recently published Action Plan serves as the foundation of the Tourism Master Plan. She reminded the audience how the public consultation was of equal importance with the technical analysis on cruise tourism—both would influence decision-making and future planning. She also noted that GOB had decided to cast a wide net of inclusion with these consultations because the proposed development has the potential to affect communities throughout the south. In the end, she acknowledged that trust is developed over time, and implored residents to collaborate with the BTB to shape the future of tourism development in Belize.

The final set of comments again demonstrated concern about the size and frequency of ships that may come to the area as a result of the proposed development project. One attendee wondered if limited available information simply meant that the consultation process was a charade. The CEO again provided the context for the consultations, pointing out that the DOE requested an environmental compliance plan for the project, a traffic management plan and, finally, an understanding of public attitudes, perceptions and viewpoints on the issue. One attendee asked if RCCL is willing to commit to marketing only smaller lines in the region, and not the big ships. The developer noted that the industry is trending towards bigger and bigger ships, but there remains a market for small ships and unique ports where big ships do not go. Another attendee suggested that ships ranging in size from 400–900 passengers—as suggested by the developer—are too big for the area to handle. Still another

insisted that more information must be provided before residents in the south can provide an informed evaluation and recommendations to government. Finally, the Director pointed out that the longer power point presentation—shared in Placencia but shortened for Punta Gorda and Dangriga—will be posted on the BTB website for all to view. She thanked the audience members for providing the kind of critical feedback that helps create a meaningful consultation process.

## **VI. RECOMMENDATIONS FOR FUTURE COLLABORATION**

The inherently complex set of circumstances surrounding the issue of cruise tourism in Belize—specifically the proposed Placencia project—necessitates a set of distinct yet interrelated alternatives for consideration by the BTB and the Ministry.

Based on the exchange of ideas, concerns and viewpoints during the public consultation, the central recommendation of this report is that **the government of Belize should not approve a new port of call (port designation), contract or agreement with cruise lines, developers or their affiliates for operations in the Placencia Peninsula.** Not only is there widespread resistance to the establishment of cruise tourism in Placencia, as demonstrated by public sentiment, there is also abundant and compelling evidence that communities in the surrounding area are ill prepared for cruise ship arrivals. Moreover, given the fact that the FGTZ was just recently launched, the Belize City model, for many, still represents a poor precedent for effective management and control of the cruise sector.

Expansion of cruise tourism to fragile areas such as the Placencia Peninsula is therefore highly problematic, risky and may result in irreversible negative impacts to the existing tourism sector, the ridge to reef resources of the south, and the safety and security of local communities. And yet tourism—including the cruise industry—remains a robust and growing sector of the Belize economy. For example, the Belize City cruise port now employs more than 2,000 Belizeans. However, evidence from other destinations suggests that negative impacts may outweigh benefits when cruise tourism overlaps in the same geographic region as an established overnight sector. The alternatives outlined below acknowledge the potential future growth of cruise tourism in Belize, yet are derived from results and analysis of the social viability assessment. Each presents collaborative processes that involve a broad cross section of stakeholders working to achieve their economic self-interests through shared responsibility, trust and mutual gain. Specific steps, additional structure and responsibilities would be defined once a process is convened.

In the context of the central recommendation above, alternative 1 presents an approach that is appropriate and ongoing from a policy perspective. Alternatives 2 and 3 describe options that Seatone Consulting believes are more appropriate, inclusive and beneficial for southern Belize but exceed the legal responsibilities of the BTB, Ministry of Tourism and other relevant government bodies.

### **Alternative 1: Implement recommendations outlined in the BTB Action Plan**

## **2010-2012 and the National Sustainable Tourism Master Plan.**

The BTB has mapped out ambitious goals, new strategies and significant restructuring for the 2010-2012 period. Simultaneously the STP is nearing publication of the Tourism Master Plan, which will provide national-level vision, goals and direction for future tourism development in Belize. Moreover, completion of infrastructure projects with funds from the Inter-American Development Bank will improve the capacity of several destinations (including in the south) to embrace well-planned growth and development in the tourism sector. However, reducing the widespread mistrust, frustration and cynicism surrounding the Placencia cruise proposal is a critical prerequisite to building trust and strengthening the BTB's established relationships—from local to national level chapters—with the BTIA, BNTOA, BNTGA, BHA, APAMO and southern village councils.

In pivoting off the focus on cruise tourism in the south, the BTB and Ministry of Tourism may foster previously unseen public/private sector collaboration aimed at implementing new marketing strategies; enhancing destination planning, standards and quality assurance; and improving organizational performance and efficient revenue collection. Lessons learned in the newly created FGTZ will increase understanding—in government and the private sector—of the challenges and necessary response to ensure effective management and control of cruise tourism in Belize, and will help guide any future expansion (geographic or not) of the sector.

### **Alternative 2: Conduct a “Limits of Acceptable Change” social study in the southern Belize region.**

This alternative exceeds policy requirements of the BTB and seeks to maximize public participation in tourism planning and development by determining, from a broad social perspective, the “Limits of Acceptable Change” (LAC) for the most valuable tourism assets of southern Belize—namely the rich diversity of terrestrial and marine ecosystems and cultural sites that form the bedrock of the industry. Effective planning and visitor management in this case requires a “horse before the cart” scenario that builds on the knowledge, expertise and economic needs of local citizens and residents, integrated within the legal authority of government resource management agencies and NGOs. The LAC is a well-tested model for dealing with issues of recreational carrying capacity at sensitive natural sites and tourist attractions. Conducting a comprehensive LAC study in southern Belize will shed light on both the type and scale of tourism that is most appropriate for the region. Moreover, the results of such a collaborative study will further inform the renewed effort for effective coastal zone management planning in Belize.

The LAC planning process consists of 9 interrelated steps that result in the development of standards for acceptable resource conditions; an assessment of current resource conditions—including inventory and ongoing monitoring of sites—in relation to mutually agreed upon standards; and the design and implementation of management prescriptions that bring resource conditions into compliance with said

standards. In this context, the LAC assumes that recreational use of natural and cultural sites has to be allowed, yet must be consistent with a high degree of resource protection (Cole and Stankey, 1997). Furthermore, it is important to note that the compromise of defining allowable limits of recreational use while ensuring effective resource protection should be achieved through a collaborative process involving multiple stakeholder groups. In this sense, the outcomes of an effective LAC study will balance what oftentimes appear to be conflicting goals of economic development and resource protection—the current dilemma facing the residents of southern Belize.

Alternative 3: Facilitate alignment of development and resource conservation priorities across ministries, departments and groups; review and refine the Belize Tour Guide Training Program; and conduct peer exchange programs on effective management of cruise visitors.

This alternative contains three separate yet related components and requires significant cooperation and coordination among different government ministries, departments and protected area authorities. Similar to alternative 2, it exceeds policy requirements of the BTB. It also implies extensive collaboration between the BTB, private sector businesses and their associations, and those interested to learn and apply lessons on effective visitor management from existing cruise ports in Belize and elsewhere.

*1. Align development and resource conservation priorities*

Belize has invested substantially in articulating national development, disaster response, and biodiversity conservation policies, strategies and plans. However, these documents commonly emanate from different ministries, departments or NGO groups, which creates a tendency for economic development to be viewed as separate and distinct from resource conservation priorities, and an emerging propensity for policy incoherence and fragmented implementation. The recent publication of the Action Plan and upcoming Tourism Master Plan creates a unique catalyst and foundational step for a broader challenge and opportunity to align goals and strategies across ministries, and with resource management agencies and NGO groups. Subsequent to this process, all relevant parties may work collaboratively to implement a governance structure that integrates development and resource conservation priorities for the benefit of tourism-dependent communities, and therefore improves public administration and management of natural and cultural assets in Belize.

*2. Review and refine the Tour Guide Training Program*

The BTB has a long established Tour Guide Training Program that provides professional development on multiple subjects ranging from natural and cultural history, visitor interaction and sustainable practices among others. According to the BTB website, individual tour guides are required to be “licensed by the Belize Tour Guide Licensing Committee, which was established with the Tour Guide Regulation instituted in 1994.” The program has functioned effectively for several years and trained hundreds of tour guides from all over the country. However, gaps and

weaknesses have been identified since publication of the first training manual and launch of the program. This provides the rationale and justification to re-visit, refine and ultimately improve the program.

Specifically, there is an opportunity for the BTB to work closely with local, regional and national tour guide associations to strengthen course content, improve delivery methods, and enhance opportunities for localized training and accreditation. While the BTB would still manage and maintain oversight of the program, a progressive “bottom-to-top and top-to-bottom” approach could maximize local expertise and ease the financial burden and time commitment for aspiring tour guides seeking certification. Moreover, the BTB can incorporate standards into training modules and develop mechanisms for ongoing quality assurance monitoring. The BTB should also consider designing new modules aimed at strengthening tour guide entrepreneurial skills, such as business planning, marketing and financial management. Finally, all training may be supported and reinforced through government tax incentives for small businesses and micro-financing opportunities for guides seeking to develop independent tour operations.

### *3. Develop and implement peer exchange programs*

In recognition of the significant interest to cultivate small scale, locally controlled and sustainable cruise tourism in southern Belize, the BTB can sponsor a peer exchange program for operators and guides seeking lessons on effective management of cruise visitors. Similar to the aforementioned alternatives, design of a peer exchange program should be a collaborative public/private sector initiative based on shared responsibility and commitment to sustainability of the sector. A well designed and effectively managed program will allow experienced professionals in cruise tourism to demonstrate, explain and model management strategies while peers from visiting destinations observe, question, explore and eventually apply new techniques and skills aimed at improving the visitor experience and minimizing impacts to natural and cultural sites. The program may initially focus on Belize City—learning from both the private sector experience and newly established government regulations—but could expand to include neighboring cruise ports such as Cozumel, Mexico or Roatan, Honduras, and eventually other Caribbean cruise destinations facing similar challenges as Belize. Specifically, such a program may benefit from exchange of effective management strategies in the Eastern Caribbean, where small scale cruise tourism is established and integrated into local economies. Finally, a comparative analysis of lessons learned in the management of the Belize cruise sector to the standards defined by a LAC process may provide additional insight as to whether cruise tourism on any scale represents appropriate development for the south.

### ***Recommended alternative***

Collaboration can come in many forms and contexts. At this time Seatone Consulting believes that Alternative 2 is the optimal approach to leverage the collaborative process and outcomes of this consultancy. Alternative 2 acknowledges, integrates and builds upon the ongoing work of the Action Plan and Tourism Master Plan (alternative 1). However, it goes beyond the minimally required policy approach and

offers significant opportunities for regional stakeholders to proactively design and shape conditions that guide future tourism development in southern Belize. The urgent need to balance economic development with resource conservation necessitates an inclusive process involving all affected parties in government, civil society, the NGO community and the wider public. In addition, there is little historic precedent for some of the core elements of alternative 3. That said, alternative 2 tests new methods of collaboration and cooperation that may build a strong foundation to address activities outlined in alternative 3 in the near future.

### ***Rationale for recommendations***

The basis for the central recommendation above and proposed alternatives is an attempt to balance resistance to cruise ships in southern Belize with the desire to create a durable and sustainable tourism sector that brings maximum benefits to the largest number of Belizeans possible. The recommendations are informed by the analysis of 28 stakeholder interviews and results of three separate public consultation meetings that, collectively, realized participation from more than 600 residents of the area. Key aspects of the rationale include the following:

- Lack of public support: There is widespread opposition to the introduction of cruise tourism in the south among nearly all materially invested groups in the tourism sector. Stakeholders have articulated numerous reasons to resist what many consider the eventual establishment of a mass tourism model of cruise development. These include potential threats to the established overnight sector; damage to natural and cultural resources from oversized and inadequately managed tour groups; exclusivity and consolidation of the industry; lack of infrastructure; the precedent of a poorly managed cruise sector in Belize City; and the inability to evaluate cruise tourism in the south within the context of a national level vision, goals and strategies for sustainable tourism development.
- Need to monitor, evaluate, and learn from Belize City: The efforts of the private sector—supplanted more recently by new BTB regulations—have made strides in recent years in improving the management and control of cruise tourism at the Fort Street Tourism Village. The newly created FGTZ may in time provide a model for how to effectively manage and control cruise tourism and associated terrestrial and marine tour activities. However, these combined efforts in some cases are just underway, and all participating parties will require time to monitor and evaluate the effectiveness of new programs. Unless GOB and the private sector can both demonstrate improved management in Belize City, it remains highly problematic and risky to expand cruise tourism to the south. As an example, until there are functioning policies, regulations and enforcement protocols in place that control cruise ship size and numbers of passengers arriving in Belize City, the fear of “small ships” opening the door to mass tourism in the south are well founded.



- Vague development plans: Stakeholders in southern Belize have been unable to evaluate the potential impacts (positive and negative) of the Placencia proposal due to limited available information on the development schemes, port designation request, expected economic benefits and analysis of market projections. However, some in the public—particularly local Belizean operators and guides—have begun to articulate preferred conditions that must be in place prior to considering cruise tourism on any scale in the area. This lays the groundwork for continued collaboration between all affected parties—the private development group, local communities, and government—to determine the feasibility, projected economic benefits and sustainable design of any future development at Placencia Point. In addition, the developer may consider modes of transportation other than cruise ship arrivals as an option to increase visitor traffic in the area. Finally, the results of the situation assessment and public meetings demonstrate that mass tourism is a relative term. For example, many consider the “small ships” highlighted by the developer to be too large for the region to effectively manage. Furthermore, stakeholders interested in cultivating small ships have proposed a capacity limit significantly lower than the market (ships carrying up to 900 passengers) proposed by the private development group.<sup>8</sup>
- Benefits of a LAC study: The results of this public consultation provide the rationale and justification for a collaborative multi-stakeholder process to determine the type and scale of tourism development that is most appropriate for the south. It is anticipated that an effective LAC study will strengthen public/private sector partnerships and contribute to a mutually agreed upon planning and visitor use management framework, thus building the capacity—by grassroots design—for enhanced protected area management and long-term sustainability of tourism activities in the region. Moreover, the LAC process may help identify, develop and market new sites and attractions. Finally, the outcomes will link acceptable resource condition standards with protected area management strategies, thus creating alignment between tourism development and conservation goals.

### *Challenges*

There is no priority or logical sequence to these challenges. Each should be given equal consideration.

- The circumstances surrounding the potential introduction of cruise tourism in southern Belize pose significant challenges to enabling an environment of collaboration versus confrontation, particularly in Placencia. In this setting, effective collaboration may require a level of transparency and information sharing not previously seen from high-level government officials. Conversely, the ability of government to foster rationale dialogue and garner feedback on its policies, plans and attempts to create sustainable economic development

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<sup>8</sup> See public statement by the PTGA in appendix 1.

opportunities—to “make rain” for Belizeans—may benefit from toned down rhetoric and accusations that emanate from the public.

- It is problematic that foreign investors—notably developers working in concert with the cruise line industry—can submit proposals directly to the highest level of government for review and approval, particularly when associated development projects may result in large scale impacts and changes to Belizean communities and resources. Although such “top down” planning in this case contributed to a reactive versus proactive response from the public, the consultations convened by the BTB nonetheless generated tremendous feedback on the issue and will inform government’s evaluation of the proposal and its views toward future tourism development.
- Improvements in the management and control of the cruise sector in Belize City represent a work in progress. It may take a significant amount of time and effort by all parties to demonstrate desired changes and lessons learned that, in turn, inform any future expansion of cruise tourism in Belize.
- It is unclear what level of transparency and collaboration the cruise lines will have with the public as they seek to expand operations in Belize, and what partnership role, if any, they will play to ensure sustainable development and effective visitor management at the natural and cultural sites that fuel profits for the industry. This may affect the ability of local communities—if backed up by government officials—to negotiate and set conditions that spread positive economic benefits and minimize negative impacts if cruise tourism expands in Belize.
- The natural resource base upon which the Belize tourism sector depends is in some cases severely threatened, and may be irreparably harmed by poorly planned and unsustainable tourism activities and coastal development projects. According to the Healthy Reefs for Healthy People Initiative, “only 1% of the Belize Barrier Reef Reserve System is in ‘very good’ condition (one site); 8% are ‘good’ 21% ‘fair’, 40% ‘poor’, and an alarming 30% of reefs are in ‘critical’ condition.” Furthermore, the reef—viewed by nearly all interviewed stakeholders as the most valuable tourism asset in southern Belize—is in jeopardy of losing its World Heritage Status, which could have significant public relations consequences for tourism.
- Effective implementation of national tourism development plans requires seamless transition across political administrations to ensure durability and longevity of goals, strategies and outcomes. Several interviewed stakeholders noted that Belize is much better at developing than implementing plans. For example, there is precedent of past plans related to the cruise sector being shelved, or their main recommendations ignored, when new political parties come into power or lucrative development projects are proposed.

## **VII. CONCLUSION**

The cruise viability assessment has revealed an earnest desire by multiple stakeholder groups to work closely with government on tourism planning and development issues. In pivoting off the cruise issue in the south, the BTB has the opportunity to build trust and facilitate cooperation on a host of issues outlined in the Action Plan and upcoming Tourism Master Plan, and at a scale and level of civic engagement not previously seen in the region. On the other hand, private sector interests and the wider public may bring a proactive approach to collaboration based on rational dialogue, openness, mutual respect and shared responsibility. The past development and implementation of whale shark guidelines and marine recreation standards demonstrates strong precedent for precisely this type of effective collaboration, which in turn leads to economically beneficial outcomes while maintaining the health and resiliency of the region's fragile resources. It is in this context that the recommendations born of this consultancy may provide a pathway to sustainable economic prosperity that grows from the expertise and interests of all public and private sector players throughout southern Belize.

## **Appendix 1. Public Statements on Cruise Tourism in Southern Belize**

The following public statements were generated between August and December 2010. They are listed here in sequential order from earliest to most recent.

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August 4<sup>th</sup>, 2010

### **Placencia BTIA Development Survey Findings Show Responding Members Not in Favor of Cruise Tourism**

A recent survey - the first part of the Placencia chapter of BTIA proactive effort to work with its members, the local councils, residents, and visitors to the area - was completed by 58% of the paid up members. The purpose of the survey was to be specific and clear about the development direction for the destination.

Ideas addressed included what was wanted for future growth of the greater Placencia area that is currently developing rapidly. Many previous comments from residents regarding Tourism Development in the area have been very specific about what they don't want in the Placencia Area as opposed to what they would prefer and the survey hopes to address that.

The respondents who took part in the survey consisted of a wide representation of the entire peninsula: from large resort developments to small "Mom and Pop" businesses; from tourism industry workers and owners; from general membership including hotels, restaurants & bars; from tour operators to tour guides and gift shops; from the Peninsula-born, the long-term residents and the newcomers; all categories took part in the survey.

The survey tackled important areas such as: The Direction Our Destination Should Follow, Infrastructure and Zoning, Types of Tourism Visitors, Target Age Groups, Types of Development, Preparedness for Major Visitor Increase, Improvements Needed, Day and Nighttime Entertainment, Fish Farming, Recycling, Marketing and more.

While it was apparent that the membership would like to see an increase in the area's overnight guests - international, domestic and regional guests, as well as recreational boating guests (sail, motor or yacht), there was a very strong answer when asked about cruise ship visitors. The overwhelming majority of those surveyed voted "Strongly Disagree" when asked if they were in favor of Cruise Ship visitors.

While it is known that small "niche" cruise ships have been visiting the area for years it is an absolute certainty that the cruise companies looking in this direction do not have boats that are what anyone in this area would consider small, manageable or what is visiting the area already.

The main area of concern regarding the proposal for cruise ships coming to the Placencia Peninsula, and also including the Southern Cayes, is that the attractions that have been developed over the years by our broad based local industry are known for their low density. These sites will experience a dramatic increase in density without the corresponding benefit to the very industry that developed them if cruise tourism is allowed in this area. These attractions - the cayes and surrounding waters, the beaches, the ruins, and the inland adventures are exactly what makes Placencia the perfect “do it all” destination.

In fact, there are so many questions our membership want answered in detail that they are requesting meetings, forums, and feedback, and an Absolute No on the signing of any contracts by BTB on behalf of the GOB, or allowing any such contract with any cruise operators unless a majority vote of our area finds strongly in favor of this type of development.

This is a major subject, possibly the largest type of direct impact that Placencia and its residents are yet to see. In a time when the economy is slumping the desire for instant cash and jobs, together with the initial generalization of all the pros, looks rosy. However BTIA strongly cautions for a full evaluation of the cons as well, and time to make sensible decisions.

The legacy of the Village, and the gift of our beautiful resources to future generations, depends on solid decisions being made now for our development. All of Placencia are in favor of preserving their heritage. We hope our PM, HON Dean Barrow, his Minister of Tourism, BTB and its CEO and new Director, examine carefully our point of view, and do not rush into agreements without imparting full facts of the likely impacts and obtaining majority consent of the area.

This statement has been issued by the Board of Directors of the Placencia Chapter of the BTIA. For further information on this and other Placencia area tourism related issues please contact our headquarters - Placencia Tourism Center, ph: 523-4045 or email: [placencia@btl.net](mailto:placencia@btl.net).

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Placencia Tour Operators Association  
General Delivery, Placencia Belize

On Monday, 23 August 2010, the Placencia Tour Operators Association voted against cruise ship tourism in Placencia. Placencia tour operators object to cruise ship tourism primarily for the following reasons:

- Detrimental effect of cruise ship tourism on Placencia’s traditional overnight tourists, with known economic benefits from overnight tourism outweighing possible economic benefits from cruise tourism;
- Adverse effects of mass tourism on fragile marine and inland environments such as coral reefs and fish and bird habitats;

- Inability of Belize to enforce laws regulating cruise tourism;
- Inability of local tour operators to obtain affordable loans necessary to comply with cruise ship requirements such as size and quality of boats and vehicles and liability insurance;
- Lack of meaningful local control;
- Local sites already at or over carrying capacity without the ability to accommodate mass tourism numbers; and
- Significantly fewer employment opportunities for Belizeans in cruise ship tourism than traditional overnight tourism.
- Lack of necessary infrastructure in southern Belize for mass cruise ship tourism, such as sewage treatment, public restrooms, garbage collection and disposal, roads – even water systems to provide drinking water in some locations. The cost of providing this infrastructure will run into the millions of dollars -- money our governments don't have – either nationally or locally.

Placencia tour operators also expressed their desire for assistance from the Government of Belize in increasing the area's traditional local overnight tourism and in strengthening locally owned Belizean businesses.

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Placencia BTIA's comments on BTB Action Plan 2010–2012  
October 21, 2010

Placencia BTIA made an official statement on August 4, 2010, expressing that our membership did not want cruise tourism in Placencia. Now we have been asked to give feedback on the BTB's Action Plan for 2010–2012. While there are many positive initiatives in this plan our membership has raised their voices in concern for items on pages 57–58 that discusses "Outcome A: Placencia's Citizenry Prepared to Manage a Sustainable Cruise Port Destination." Issues of concern are as follows:

1. A consultation, hosted by the BTB, has been scheduled for Friday October 22, 2010, in Placencia Village for this community and the surrounding areas to discuss CRUISE TOURISM. If a consultation on this subject has not happened how can "Outcome A: Placencia's Citizenry Prepared to Manage a Sustainable Cruise Port Destination" be included in this Action Plan? Its presence in the Action Plan has led many to believe that the decision has already been made and our destination is being used.

2. Placencia's existing tourism product – overnight guests that enjoy the uniqueness of Placencia and the surrounding areas – works. The jobs created because of our overnight guests employ many, many people in this area. Where is the focus within the action plan to improve this sector? It seems as if the entire Action Plan puts more of an emphasis on cruise tourism and no mention of overnight tourism at all in Placencia.

3. Feedback from guests that have been to Placencia is that they would be reluctant to return if Placencia became a cruise destination. Loss of overnight tourism will lead to many small businesses losing business and even loss of jobs.

4. The IDB funded STP project has a description as follows: The Program will consist of the following two components: (a) investments in overnight tourism destinations which will finance studies, final designs and investments in civil works and equipment aimed at improving the quality of the tourism natural and cultural products at consolidated destinations in line with Destination Management Plans developed during Program preparation; (b) Institutional strengthening and capacity building for policy, destination planning and management.

5. The consulting group working on the STP component of a 15 million loan from IDB (Tourism & Leisure Europeanism Consulting) came to Placencia on October 6, 2010 for a consultation and to present their draft plan for Placencia peninsula. In discussions, they made strong recommendations that NO cruise ship dock be placed anywhere in Placencia or Big Creek. They were advocating low impact tourism development for the area. They commented that if cruise were a necessary factor it should be located north of Riversdale along the coast near the new airport. This team has spent a serious amount of time and millions of dollars to research the Belizean market & product and make proposals to GOB and they present our area clearly as low-density overnight high-end tourism.

It seems as if the BTB Action Plan 2010-2012 is either trying to make the Placencia peninsula and surrounding areas, eco-friendly, overnight, low density tourism product coexist with mass tourism OR to phase out our existing product completely. Neither of these options are acceptable to the membership of the Placencia BTIA who feel that the two CANNOT coexist. The Placencia BTIA is not against sustainable tourism practices – we do not feel that cruise tourism of this proportion fits into a “sustainable” tourism category. We feel that everything that makes Placencia the outstanding destination it is will be compromised if we are made to move in the direction of cruise tourism.

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Placencia Tour Guide Association  
November 3<sup>rd</sup>, 2010

To Whom It May Concern,

The Placencia Tour Guide Association (PTGA) has met on several occasions, to discuss the issue of cruise tourism in Southern Belize. Because of the lack of information and wanting to find out more, the group decided to seek that information through meeting with key personnel in the Ministry of Tourism and also attending the consultation on the issue before taking a position. Even though there are still some unanswered

questions, the vast majority of the group at a meeting held on the 28th October 2010, decided we can move forward on a position.

Three Positions were discussed and put to a vote at the meeting. These three positions are as follows:

- 1) No to cruise ships in Placencia
- 2) Yes to cruise ship in any form and
- 3) Yes to cruise ships under the following condition:
  - i. No privately owned cruise village;
  - ii. No ships bigger than 500 passengers;
  - iii. One ship per day for not more than three times per week;
  - iv. Use only local tour operators and guides of Southern Belize (no monopolies);
  - v. Designate tour sites for cruise ships (not in protected areas);
  - vi. Properly monitor the impacts on village and tour sites;
  - vii. Have limits on size of boats and buses used to conduct tours (no boats bigger than 48ft and no buses bigger than 20 passengers);
  - viii. Agree on prices for tours;
  - ix. Ensure proper provision for garbage disposal and adhere to regulations regarding overboard discharge.

The results of the vote, with 48 members present, were as follows:

- No votes (0) on position #2;
- Five (5) votes on position #1; and
- The remainder voted (43) on position #3.

The majority of the group still feels that we need to meet with the representative from Royal Caribbean and government officials to get answers to some very important concerns.

Respectfully,  
Warren Garbutt  
Chairman, PTGA

December 13<sup>th</sup> 2010

Addendum to original statement:

Upon further discussion with a few tour guides in the area and members at the meeting who voted on position #1, it is important to note the valid concerns and reasons those members gave for not supporting cruise tourism in Placencia. These members feel that overnight and cruise tourism simply do not go together and they are not willing to take that risk. Those members also feel that the resources in and around Placencia are too fragile and cannot be compromised. Another reason those members gave for not supporting cruise tourism in Placencia is the lack of confidence in authorities responsible for the execution of cruise tourism policies in Belize City.



Members feel that these problems need to be sorted out before cruise tourism can be expanded.

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November 2<sup>nd</sup> 2010

Position of the Association of Protected Areas Management Organizations (APAMO)  
on the proposed cruise tourism in Placencia

The Association of Protected Areas Management Organizations, APAMO, considers that the proposed cruise tourism for Placencia is neither an environmentally or economically viable strategy for Belize.

Our tourism industry continues to be of significant importance to the economy and to the development of the country. Belize has successfully established itself as an “eco-tourism” destination, catering for small-scale, nature and culture stay-over tourism. Internationally recognized as an environmentally friendly destination, Belize has been described as “Mother Nature’s Best Kept Secret”, the “Jewel of the Caribbean”, “Bird-Watcher’s Paradise”, among other similar terms due to its rich natural and cultural heritage. Belize is unique in so many ways, offering a variety of natural and cultural experiences. It is home to the second-longest barrier reef in the world, Mayan temples that span across the country, the world famous Blue Hole, spectacular cave systems and a rich living rainforest, habitat to hundreds of species of flora and fauna. All these attractions make Belize the perfect "do it all" destination.

Expanding cruise tourism, particularly in the southern part of the country, one of the most ecologically rich areas, can have detrimental and irreversible impacts on the ecosystems and biodiversity of the marine protected areas and other sensitive areas in that region. A port large enough to accommodate cruise tourism will disrupt the migratory patterns of many marine aqua fauna such as the prestigious whale sharks which come in annually from March to July to feed and which alone generate millions of tourism revenues every year. This area also supports the largest variety of fish spawning aggregations. It has been recorded that as many as 20 different fish species aggregate to spawn in this general region at the Gladden Split which is located within the Gladden Spit and Silk Cayes Marine Reserve. Sea turtles also migrate long distances to nest on the beaches of nearby islands such as at the Silk Cayes. The area also supports many mangrove islands that are vital to nesting and migratory birds. The seagrass beds are ecologically vital to nursery fish populations that support the fishing industry. The Placencia lagoon supports fish nursery populations and the impacts of a port can have ecological imbalance to the flow of nutrients, water quality and general stability of this estuary region. Our coast is also very sensitive with mangroves and seagrass beds which support our fish, manatee and sea turtle populations. The Belize Barrier Reef Reserve System, including its atolls is invaluable to the tourism and fisheries sector and for the protection of coastal communities. Declared a world heritage site in 1996, it is presently at risk of losing this status due

to the current threats it faces. Cruise tourism will only increase the pressure to this system from the waste and pollution produced by the industry, which experts have classified into 7 types: black water, gray water, garbage and solid waste, hazardous waste, oily bilge, ballast water and diesel exhaust emission.

In addition, APAMO does not consider that cruise tourism will benefit the majority of Belizeans in the long term but rather only a very few in the short term. Cruise tourism will not solve the economic problems of these respective areas. The November 2006 study conducted by the INCAE Business School in Costa Rica with the support of the BTB and PACT, found that on average cruise passengers spend \$44 for the 1 day they dock in Belize while the average stay-over visitor spends \$96 per day and on average stays 6.8 days in Belize representing an average of \$653, almost 15 times more than what a cruise ship passenger spends in Belize. In 2005, prior to the global economic recession, BTB reported 800,331 cruise passenger arrivals compared to 236,573 stay-over arrivals, if we use the average that each spends, the stay-over visitor still spent \$119,267,605 more than the cruise ship passengers who only spent \$35,214,564 while stay over passengers spent \$154,484,169, almost 4.4 times more. We would therefore have to attract 3.5 million cruise visitors a year to obtain the same revenues. Imagine what 3.5 million visitors a year would do to our natural resources. Also, in terms of employment, again this study indicated that cruise tourism contributes to only 1 of every 10 jobs while stay over tourism contributes to 9 of every 10 jobs. Stay-over visitors usually decide on their destination for the "experience". Expanding cruise tourism, may result in these stay-over visitors changing their destination to avoid the massive numbers of cruise passengers both at the marine parks and at the other sites resulting in the successful branding of Belize as "Mother Nature's Best Kept Secret" being tarnished and significant revenues to the local economy lost. The so-called benefits to the local communities are miniscule to what the cruise lines make. Studies show that world cruise lines make over 70% of their profits in the Caribbean, and that they purchase virtually nothing from the region. Belize is no different. While cruise lines can change course on a whim leaving behind only a trail of economic and environmental disaster, stay-over tourism provides for a more long term sustainability of our natural resources and stability of our economy, provided that the very core of what draws them to Belize is not put at risk.

This Government committed to developing the tourism industry in a responsible manner that is environmentally sensitive, supports the protection of the country's cultural and natural resources and provides tangible benefits to the people and local communities of Belize. However, Belize's global reputation as an eco-tourism destination can be seriously jeopardized by the unrestrained growth of Cruise Ship Tourism, an industry that has historically shown little respect for environmental and cultural conservation. The National Protected Areas Policy and System Plan endorsed by Government, aims to safeguard the natural resources found within protected areas. However, the integrity of these natural resources can be degraded by carelessly implemented development projects that do not address sound environmental management.

The eco-tourism industry in Belize is by far too precious. Eco-tourism, unlike Cruise tourism, has been proven that it can co-exist with maintaining the integrity of our Protected Areas which in turn supports the very same eco-tourism industry. Our marine protected areas, reefs and cayes, already ecologically sensitive areas are currently under significant stress. Replacing eco-tourism with mass tourism will further increase the pressure on these areas as it is already difficult to monitor and enforce the carry-capacity limits where they exist placing them at unacceptable risks.

The environmental, social and economic cost of cruise tourism is too high and the benefits too little. Rather than investing in expanding the cruise sector, APAMO, calls on the Government to invest these funds in building the stay-over tourism sector.

The Association of Protected Areas Management Organizations (APAMO) therefore express its solidarity with BTIA Placencia and the Placencia Community and does not support any activity that would compromise the protected areas and the ability of our natural systems to maintain a healthy environment that is critical to sustaining the population and economy of Belize.

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December 2<sup>nd</sup> 2010

Minister Manuel Heredia  
Ministry of Tourism, Culture and Civil Aviation  
Cor. Regent & South Street  
Belize City, Belize

Dear Minister Heredia,

The Belize Tourism Industry Association (BTIA) is the country's national organization which serves as an umbrella association with various chapters throughout the country (Corozal, Orange Walk, Ambergris Caye Caulker, Dangriga, Hopkins, Placencia and Toledo) along with sector representation as well (Belize Hotel Association, Belize Tour Operators Association and the Belize National Tour Guides Association).

After carefully considering the matter of the viability of the proposed cruise project for Placencia that has been presented to the Government of Belize and listening to the concerns and positions of the Placencia BTIA, we through this medium extend our support to Placencia BTIA on its position that it opposes cruise ship tourism for its destination.

The Placencia BTIA has been clear in its opposition for cruise ship tourism development following the BTB public consultation on the Cruise Tourism on October 22<sup>nd</sup> and its position is based on five salient points:

- 1) The negative impact such developments would have on overnight tourism
- 2) The lack of information and communication as was stated at the consultation that the Ministry was approaching the cruise lines to come to Southern Belize
- 3) The income earned from cruise tourism as studies have shown do not support the majority of communities where they are involved
- 4) The IDB Sustainable Tourism Project's tourism master plan consultants (Tourism & Leisure Europraxism Consulting) during its October 6<sup>th</sup> 2010 consultation made strong recommendations that no cruise projects be placed anywhere in Placencia or Big Creek
- 5) Many details of the proposed cruise tourism development are still unanswered including passenger capacities of the ships, frequency of the ship calls, time of year for the ships visitation and projections over a 5 or 10 year period of increase in these numbers.

As an umbrella organization, the BTIA has heeded the concerns of one its chapters and stands in support of its chapter's position and recommends that the Ministry and the Belize Tourism Board carefully considers the concerns expressed by these stakeholders in the industry and respect their position that as these questions remain unanswered, the Placencia BTIA remains strongly opposed to such cruise tourism developments for the area.

Regards,

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Dionne Chamberlain-Miranda  
President

Cc: Hon. Dean Barrow – Prime Minister  
Hon. Melvin Hulse – Area Representative, Placencia  
CEO Michael Singh – Ministry of Tourism  
Seleni Matus – Director of Tourism, BTB  
Wendy Lemus – President, Placencia BTIA

## **Appendix 2. Situation Assessment Survey Instrument**

1. Background in the tourism sector
  - a. What is your current and historical involvement with the tourism sector?
  - b. Have you ever been involved with cruise ship tourism, whether contractually or informally? If yes, please describe.
  - c. Do you own, manage or administer tour operations? If yes, please describe.
2. Status of the tourism sector
  - a. What do you see as the most valuable tourism assets of southern Belize?
  - b. Have there been any changes in the tourism sector in recent years? If so what are they and have they affected you?
  - c. Have there been regulatory changes in the tourism sector in recent years? If so, what are they and have they affected you?
  - d. From your perspective, what agencies, groups, and people are responsible for the management of tourism development and associated activities in Belize?
  - e. What are their roles and responsibilities?
  - f. Are these roles appropriate for the tourism sector?
  - g. What should be the goals of tourism development and associated activities in Belize?
  - h. How effective is the current management of the tourism sector in Belize and how do you define “effective”?
  - i. Can you identify any opportunities or needs that could be addressed in the management of tourism development and associated activities?
  - j. Can you identify any opportunities or needs that could be addressed in the management of cruise ship tourism in Belize?
  - k. What do you see as the most important challenges or threats to the long-term viability of the tourism sector?
  - l. How can these challenges be addressed?
3. A community-based approach to tourism growth and management of impacts

Text read to interviewee:

An expansion of cruise tourism is being proposed in Belize, with a new focus on potential development in the southern region of the country. As a result, there has been much discussion and debate about both the benefits and drawbacks of the cruise sector in Belize. Furthermore, many industry stakeholders and observers believe that Belize did not prepare adequately for cruise tourism in the past and that the destination has been playing “catch up” ever since its inception. The BTB, with the assistance of a third-party facilitator, will be hosting three public consultations on the issue, whereby the communities in the south may share their sentiments on the issue in order to inform any decision-making or potential development of cruise tourism in the area. It is hoped that the results of this consultation process may generate community-supported recommendations and associated action steps for evaluating and/or managing cruise tourism development in southern Belize.

In this context:

- a. What needs to happen for the BTB to meet these objectives?
- b. What will success look like and how do you see yourself contributing to that outcome?
- c. One of the stated objectives of the upcoming public meetings is to “generate community-based recommendations on potential cruise ship tourism development in southern Belize.” Do you feel this can be achieved?
- d. Is it possible to achieve consensus on recommendations generated as a result of these meetings? If yes, why? If no, why not?
- e. How will you balance your intention to influence the outcomes of the public meeting with the interests of other community members?
- f. What areas of self-interest do you share with other members in your community?
- g. Are there issues of disagreement among community members regarding potential of cruise ship development in the area? If yes what are they and how can they be resolved?

4. Information needs and uses

- a. What do you know about any existing studies or anecdotal information on the impacts—whether positive or negative—of cruise ship development?
- b. In consideration of the potential for cruise ship development in southern Belize, what if any, information or data would you like to have made available for community evaluation of the issue?
- c. What role, if any, do you feel the BTB can play to assist communities in southern Belize to evaluate potential cruise ship development?
- d. What other types of information would help inform evaluation, collaboration and decision-making at the community-level?