

TOURISM ISSUES IN BELIZE

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ABSTRACT: *The Belizean economy is currently at a crossroads as the global neoliberal imperative pressures domestic policy-makers to open its consumer and investment markets. Like most developing states, Belize must struggle to earn foreign exchange to pay for its rising import bills, but its traditional export commodities - sugar and bananas - face the loss of preferential access to European Union markets as the result of recent rulings by the World Trade Organization. Tourism is one sector of the national economy with the potential to offset the anticipated shortfall from the traditional export earners but the nature of the growth needed for it to do so has generated great controversy within Belize. This paper, based upon research conducted in Belize in 1998, identifies the major issues and problems confronting the tourism industry whose resolution will be essential if the sector is to play a more significant role in the country's future development. It concludes with an assessment of likely outcomes for this increasingly important activity.*

The small Central American nation of Belize, formerly British Honduras, is at a crossroads in its national development. Like most lesser-developed countries (hereafter, LDCs), it is under intense pressure from the neoliberal imperative currently driving the global economy to open its consumer and investment markets to unimpeded imports and capital flows. These processes offer potential financing for development projects but simultaneously boost the need for enhanced foreign exchange earnings to pay for rising bills. Unfortunately for Belize, this occurs at a time when two of its traditional commodity exports - sugar and bananas - face the loss of preferential access to the European Union (EU) market, the country's major export market for such products, as a result of recent rulings the World Trade Organization (WTO). Paradoxically, these unfavourable rulings resulted from challenges initiated by the United States, the source of most of the goods that Belize currently imports.

These changes increase the urgency felt by other sectors of Belize's economy, which must offset anticipated earnings shortfalls from the traditional exports. Tourism, a new industry with growth potential, is one of the targeted sectors. There is controversy raging, however, concerning the

direction(s) that future growth in tourism should take. Belize enjoys a reputation as an environmentally aware, stable, democratic destination. Its tourism features small-scale facilities and the country has shunned "mass" or "resort" tourism that many participants feel is incompatible with the eco-tourism that first put Belize on the global travel map. The empirical evidence accumulated over the past two decades indicates that, as a development path, tourism is fraught with difficulty; indeed, it is often considered a "double-edged sword." Growing awareness of tourism's problems has led many countries to carefully weigh various tourism models as part of their tourism policy decision-making processes. Belize exemplifies those countries that are moving cautiously in this arena.

This paper is based upon research conducted in Belize during the summer of 1998. It analyzes several aspects of Belizean tourism, including the private, public, domestic, expatriate, foreign, small-scale, large-scale, and indigenous players in the industry. It begins with an overview of Belize itself, highlighting both the distinctive qualities that attract visitors from abroad and the social context within which the country's development proceeds. Next, the existing Belizean tourism industry is profiled. This is followed by a discussion of six major issues

confronting the industry as it prepares to assume a larger role in the national economy. The paper concludes with an assessment of likely outcomes as Belize pursues development within global and regional frameworks that move it into growing competition for tourism markets with other LDCs responding to similar economic imperatives.

BELIZE: CENTRAL AMERICA OR CARIBBEAN?

Belize (Figure 1) is a small country with a large identity crisis. Though situated on the Central American isthmus, it faces the Caribbean Sea and shares a colonial past with many insular Caribbean states and Guyana. It is officially English-speaking, unlike its mainland neighbours, the result of two centuries of British rule. Smaller than all Central American states except El Salvador, it is significantly larger than Jamaica, Puerto Rico, and the Lesser Antilles, increasing its physical geographic diversity and tourism potential. In the 1990s, the country participates in the affairs of both regions, as a member of Caribbean Community and observer to the Central American Common Market, suggesting a possible future role as a "bridge" between the two.

The country's small population is a distinctive feature. The 1991 census counted 189,000 inhabitants; estimates for 1998 range up to 240,000, at a density of fewer than 30 people per square mile. One third of the people are concentrated in greater Belize City, leaving vast tracts of sparsely settled land, appealing to ecotourists but rendering the country more vulnerable, particularly to Guatemala, whose claim to Belize dates back to the colonial period. Population size limits the tax base and finances available for the infrastructure development needed to boost the tourism sector. This is reflected in the dearth of paved roadways, especially in the half of Belize lying to the south of the east-west Belize City-Belmopan-San Ignacio axis (Figure 1). As a result, the country must rely upon foreign donors to finance improvements in its transportation system.

Despite its small population, Belize is ethnically and racially diverse, adding to its tourism appeal. Creole-speaking Afro-Belizeans are politically

dominant, though representing just 30% of the 1991 population. They are descendants of the labour force imported by the British to work in timber extraction and on the first plantations. They are concentrated in Belize district, especially in Belize City, where they constitute 70% of the population (Barry and Vernon, 1995; p. 69). Spanish-speaking *mestizos* represented 40% of the 1991 population and dominate the northern Orange Walk and Corozal districts and the western Cayo district. Many are descended from refugees who fled Mexico's War of the Castes in the mid-1800s. Other significant groups include the *Garifuna*, also known as Black Caribs, three distinct Mayan societies, German Mennonites, and smaller numbers of Chinese, Indians, Europeans, Lebanese, and North Americans. As English is the language of Belize's education system, all longer-term residents are fluent in the language regardless of what they speak at home, an asset to the country's tourism aspirations. Such multi-ethnicity yields a rich cultural mix; it also engenders the possibility of social tensions, especially where the ethnic balance is shifting. Belize received several thousand refugees during the 1980s from war-torn Guatemala and El Salvador, and subsequent labour migrations came from those countries and Honduras. Animosity between Creoles and *mestizos* rose as the latter increased numerically, diminishing the country's Caribbean identity. Such tensions have not resulted in widespread violence but they are of great concern to the government and to the tourism sector, whose well-being depends upon the country's traditional stability. So long as tranquility reigns, however, Belize's mixed identity can be marketed in positive ways to attract visitors who seek a Latin American experience in an English-speaking setting.

BELIZE'S TOURISM INDUSTRY

A profile of a country's tourism industry customarily includes data on the numbers and sources of visitors, their arrival points and destinations within the country, their spending characteristics, length of stay, and the activities in which they are engaged during their trips. It also focuses on employment, tourism infrastructure, particularly in the

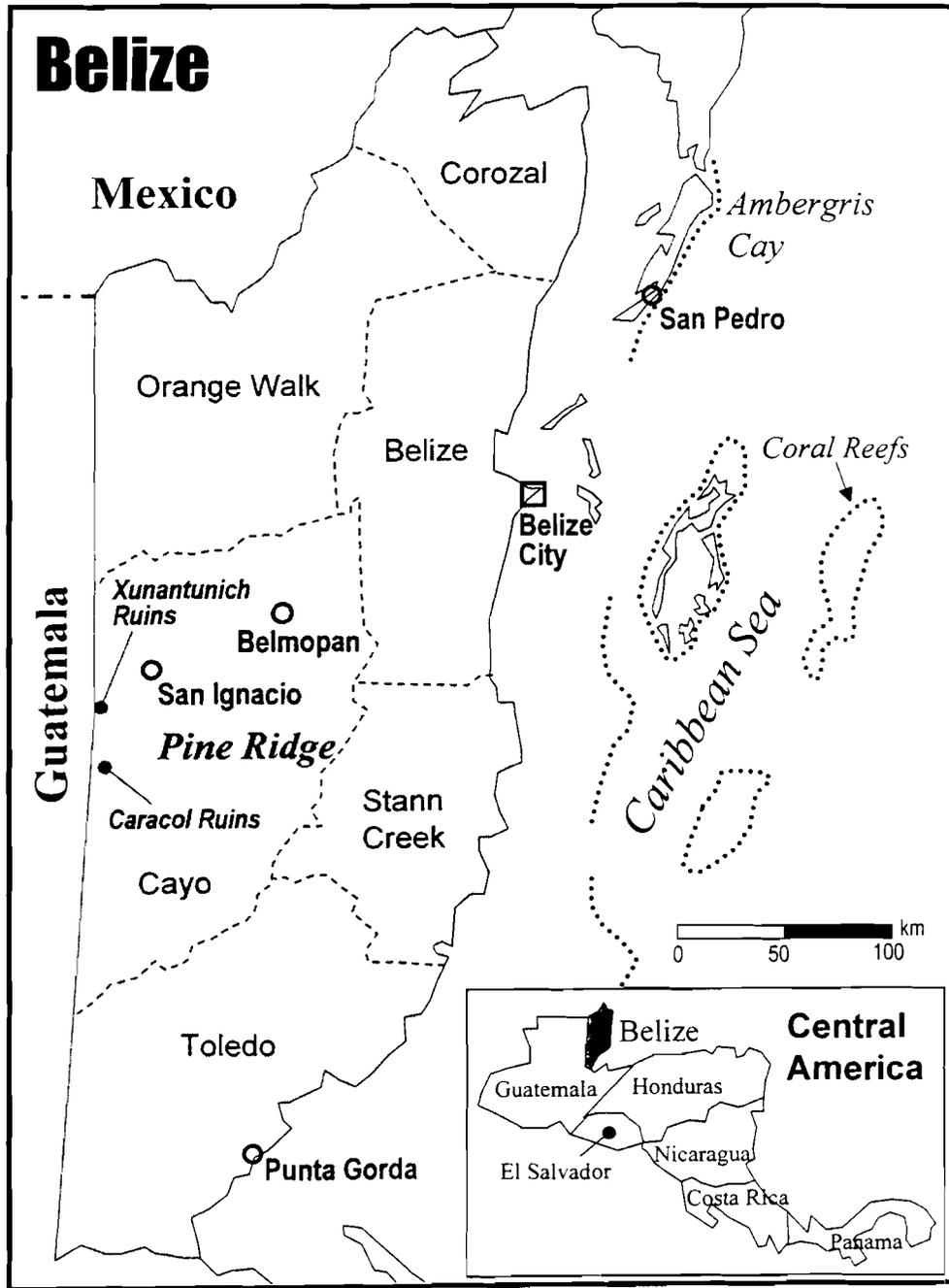


Figure 1: Belize (courtesy of Dr. J-P. Rodrigue)

hospitality sector, where occupancy rates and seasonality are of great concern. Space limitations preclude development of an exhaustive profile here; what follows offers a brief overview of Belize's tourism industry and insights to the discussions of specific issues that follow.

Data collected on tourist visitations is problematic in many countries and Belize is no exception. Prior to 1991, border commuters - people working in Belize but living in adjacent regions of Guatemala and Mexico - were tabulated as tourist arrivals, making analysis of tourism's size and growth more difficult. Beginning in 1991, a change in classification methods made it possible to distinguish tourist and cruiseship visitors from other arrivals. Visitations increased from 77,970 in 1991 to 136,967 in 1997. Growth has been inconsistent, however, with declines registered in 1995 and 1996 (BTB, 1998). Unfortunately, Belize does not separate tourists from other arrivals when tabulating source areas of its visitors, making it difficult to ascertain its major tourism markets. One must rely upon the regular surveys of tourists conducted by the Belize Tourism Board (BTB); these provide a clear indication that the country is heavily dependent upon the US market, source of 63% of all respondents, followed by Europe and Canada, with 23% and 7%, respectively (BTB, 1998; Section 4, p. 3). Given this concentration, diversifying source areas should become a high priority for the country's tourism planning. The potential payoff of such a strategy seems obvious given that current visitors remain in the country an average of 7.1 days while spending an average of US\$100 per day (BTB, 1998, Section 4, pp 3-5). Canadian visitors stay the longest, an average of 8.5 days.

The great majority (64%) of foreign visitors in 1997 entered the country through Belize City's international airport; fewer than 2% arrived on cruiseships. Most of the others (27%) entered Belize by land, from Mexico's Yucatan Peninsula in the north or Guatemala's Peten region in the west. Another 4.7% entered the southern port of Punta Gorda by ferry from Guatemala or Honduras (BTB, 1998, Table A). This indicates that many tourists now include Belize on multi-nation itineraries, a trend its tourism policy makers would like to expand. There is a pronounced seasonality to tourism in Belize. Visitation is highest during the winter months and December through March

are the only months with hotel occupancy rates above 30%. February and March are busiest, but even then, occupancy seldom tops 40% (BTB 1998, Table 2.6). May through October are the slowest months, with occupancy rates below 25%. In general, hotel occupancy has remained low. Despite this, construction of new facilities has continued. Both the number of hotels and the number of beds have doubled since 1988, possibly offsetting rises in the rate of occupancy during that period.

Once in Belize, tourists have many options available. The country offers a variety of cultural and physical attractions, including several Mayan archaeological sites and the world's second longest barrier reef. Its mountains and rainforests, many set aside in parks and reserves, appeal to eco-tourists, including many birders. Belize's cultural mix, especially the Garifuna and contemporary Mayan groups, attracts other visitors. These sites are geographically dispersed, but the country's size makes it possible to see many of them as day-trips from a centralized base. This has led to the rise of three focal points of "hospitality" infrastructure: San Pedro/Ambergris Caye (on the barrier reef), the San Ignacio area (western Cayo district), and Belize City. Accommodations can be found elsewhere, including on smaller cayes and in coastal towns, but are fewer in number. The spatial concentration of the accommodation sector increases the demand for transportation, leading to employment opportunities for many van/taxi drivers. Most also serve as tour guides, for which they are certified through training programs offered by the BTB (DuPlooy, 1998).

The hospitality sector in Belize differs substantially from that found elsewhere in the Caribbean region. The number of beds - 6425 in 1997 (BTB, 1998, Table 2.3a) - places it among medium-sized destinations such as the US Virgin Islands, but nearly 92% of its 383 hotels are small, with 20 or fewer rooms. Only six have more than 50 rooms, all of them in Belize City and Ambergris Caye (BTB, 1998, Table 2.3b). This profile suggests a limited presence of major international chains; in fact, the ownership pattern includes non-resident foreigners as owners of the few larger properties and some medium-sized hotels; resident expatriate owners of medium-sized properties, especially eco-lodges; and Belizean nationals as small-to-medium-scale property owners.

The latter were prevalent during the initial stage of Belizean tourism in the 1960s but their importance has declined since. Many have sold out to foreigners who benefited from favourable government policies oriented to attracting foreign capital.

With a diverse economy based upon agriculture and services, Belize is less dependent upon tourism for job creation than many of its Caribbean neighbours. Nevertheless, the sector is still important to a labour force of 71,000 (1997), with approximately 4000 working directly in tourism and another 9000 indirectly employed in the industry (Ramnarace, 1998). Unemployment hovers around 12% (1997) for the nation overall, making additional employment opportunities welcome, particularly in view of anticipated job losses in sugar production.

The lack of paved roads in the southern districts of Stann Creek and Toledo retards their tourism development efforts. Though matters have improved during the last decade, the "Southern Highway" remains their only road link to the rest of Belize. It is a dirt road with narrow wooden plank bridges crossing rivers and streams. A paving project is now in progress; until its completion, the south will endure relative isolation that places it off the path of most foreign visitors. Other transportation options include scheduled air and ferry service. Many remote communities are linked to Belize City by small propellor planes that land on narrow, often unpaved airstrips. Coastal and insular settlements are served by private "ferries," in reality, large uncovered speedboats. These options may differ from what many tourists may expect or hope for, though they add to the charm of the Belizean experience. For independent travelers, a market the country seeks to attract, these alternatives are economical and appealing.

ISSUES CONFRONTING BELIZEAN TOURISM

Today, Belize faces major challenges as it attempts to invigorate its tourism industry to overcome the anticipated earnings shortfall from its traditional export commodities. Each challenge, though, presents opportunities to plan the growth of the industry in an effective, sustainable manner to increase its

contribution to future national development. The number of issues involved is greater than can receive treatment here; instead, a selection of six challenges is presented for analysis. First, the direction for the industry is critical, as various kinds of tourism are seen as incompatible with others. Belize must choose whether to pursue "mass tourism" with its large resorts and cruiseship calls or to continue emphasizing eco-tourism and other special-interest tourism. Second, institutionalization of the industry must be reconsidered, a problem frequently encountered in LDCs. The roles of public, private, and parastatal organizations must be defined and linkages among them improved. Third, the issue of tourism's dispersion throughout the country should be reviewed. Most activity is now found in just two of the nation's districts, Belize and Cayo, but tourist attractions exist in all six. Fourth, Belize's geopolitical situation will affect its tourism development as the country hopes to increase the share of tourists including Belize on multi-country *Mundo Maya* itineraries. Fifth, recent activism by Belize's indigenous population, 10% of the national total, is generating native land claims, the success of which will affect tourism, particularly in Toledo district. Finally, effective marketing is essential if Belize is to boost its low occupancy rates, generate foreign exchange, and create employment. It ventures into this realm at a time when many other LDCs face similar imperatives to do so, yielding a very competitive climate that requires Belize to clearly distinguish its offering from those of numerous other tropical destinations.

Belize has little choice but to confront all of these matters simultaneously. This necessitates a well-coordinated, comprehensive plan. This process has already begun. The Ministry of Tourism and the Environment engaged a consulting firm to study Belize's tourism industry and make recommendations for future strategies with regard to its development. These outside consultants, at the very least, have provided a basis for discussion of many of the important issues to be considered by the various public and private entities involved in the industry.

Special Interest versus Mass Tourism

The direction of Belizean tourism underlies virtually all of the other decisions the country must

make concerning the industry. Since its inception, Belize has relied on SCUBA diving and eco-tourism as the pillars upon which the rest of the industry was constructed. Travelers seeking those forms of tourism generally prefer small-scale settings that enable them to peacefully enjoy the natural attractions they have come to see. They often fall into the category of "independent travelers" who shun package deals and rely upon travel agents for reservations but do their own research on possible destinations. Most of Belize's tourism infrastructure was designed to accommodate such guests, as the hotel data above implies. Even the largest concentration of tourism development in the country - Ambergris Caye - retains its dirt roads and enforces a three-story limit on construction to maintain the sense of intimacy upon which its reputation has been based.

"Mass tourism" is rather different. Large-scale resorts and cruiseships often are owned by foreign corporations, frequently having links to the transport sector to create the easily marketed travel packages that Belize currently lacks. Travelers in this sector are often more concerned about the nature of the facilities than with the specifics of the destination. Indeed, all-inclusive resorts fitting into this category remove any necessity for interacting with the host society by providing all lodging, meals, entertainment, and activities on the resort property. Cruiseships satisfy all basic needs; passengers generally leave the ships only to shop or for day-trip activities. The travel agents relied upon by such travelers are encouraged to participate in "familiarization tours" so that they can more effectively promote the hotel or ship involved.

There is considerable tension between these two forms of tourism in other Caribbean states (see Wiley, 1996). The presence of "mass tourists" in territorially small locations has made it difficult for the region to attract environmentally-oriented travelers, despite considerable eco-tourism potential. The growth of eco-tourism appears as a priority in development plans in many Caribbean countries (Dominica, Grenada, St. Kitts-Nevis, Curacao), even in the Bahamas, well-known for mass-tourism, though officials privately express recognition of the challenges they face in achieving that goal. But Belize already has an established eco-tourism industry. It must decide whether it wishes to further develop that sector, branch out in a new direction, or do both. There is

considerable opposition to choosing the latter two paths, primarily emanating from the sizeable number of small-scale operators in the country's traditional tourism sectors. They argue that the two forms of tourism are incompatible and that Belize risks losing its long-term base clientele if it pursues mass tourism. These tensions are politicized by public sector policies increasingly oriented toward easing the conditions under which investment capital flows into the country, facilitating infrastructural development in the mass tourism sector despite official rhetoric that continues to advocate eco-tourism. Such confusing signals from Belmopan, the national capital, increase the anxiety of proprietors in the eco-tourism sector, stimulating many to become active in the Belize Tourism Industry Association (BTIA), the major private sector organization involved with Belizean tourism, as below.

Tourism Institutionalization in Belize

Researchers who focus upon developing countries frequently encounter issues related to the need to strengthen institutional capabilities. One legacy of colonialism has been its notorious inattentiveness to developing strong institutions capable of serving national needs in the post-independence period. Like many LDCs, Belize exemplifies this situation, and it applies to the country's tourism industry where just three major institutions can be identified. These include the Ministry of Tourism and Environment, the Belize Tourism Board (BTB), and the above-mentioned BTIA.

The Ministry of Tourism and Environment is the major public sector entity involved. Its responsibilities include policy development and implementation, and research on matters of concern to tourism in Belize. The linkage between tourism and environment is unusual, dating only to 1989 (Pat, 1998) manifesting the high priority afforded to eco-tourism. Ministry officials and documents acknowledge the dependence of a strong eco-tourism industry upon a healthy environment and one emerges from their offices with a sense that the future of eco-tourism in Belize is secure. This is not necessarily the case, as the ministry lacks the power of other divisions of the government, particularly the Ministry of Finance, which is responsible for economic planning. The latter must contend with broader issues of national

development within the current neoliberal global climate and will therefore play an important role in determining tourism policy in Belize.

The second institution of note is the Belize Tourism Board (BTB), a parastatal agency based in Belize City whose primary function is tourism promotion. It also acts as liaison between the public and private sectors and with regional associations like the Caribbean Tourism Organization (CTO). In addition, it conducts research on the industry and serves as an information center for drop-in tourists.

Finally, the BTIA, an umbrella organization for private sector interests, operates at national and district levels, with subgroups in all six of the country's districts. It officially opposes any move toward mass tourism (DuPlooy, 1998). It faces the challenge of keeping its constituent groups, including large-scale and small-scale hoteliers, guest house owners, tour guides, eco-lodge owners, boat operators, restaurateurs, and naturalists, actively involved in the associations activities. These groups do not often see themselves as sharing common goals and interests. There was evidence that this had begun to change by the summer of 1998, due in part to the hiring of a full-time director for its General Secretariat in 1997 provided a degree of professionalism and continuity to an operation that previously functioned through the efforts of volunteers. The change was also precipitated by the emergence of an issue that galvanized concern among BTIA members. The issue involved a proposal to redevelop an historic section of Belize City into a multi-block shopping area and cruiseship pier, similar to those now found on several Caribbean islands. The plan calls for razing several of the city's finest Victorian structures, including the headquarters of the Belize Audubon Society (BAS), which is leading the opposition to the project. The BAS manages six of the country's national parks and spearheads Belize's environmental education program. Consulted regularly by the eco-tourism sector, it is concerned about the impact of increased cruiseship traffic on the country's barrier reef, which offers few access points for large ships. The BTIA passed the "Caracol Declaration" in 1998, calling successfully upon the government to halt plans for the project until it can be reconsidered (Nightingale, 1998).

As Belize is a small country, the people involved in these organizations often know one another

on a personal basis. The potential exists for greater coordination. The imminent need to ascertain the future direction of Belizean tourism clearly provides an opportunity and rationale for achieving higher levels of cooperation.

Geographic Dispersion of the Tourism Industry

Only two of Belize's six districts now benefit significantly from tourism. Belize district, centrally located, includes the country's premier entrepot, several diving destinations, and an array of eco-tourism and cultural sites. It has the best road and boat networks in Belize, rendering its attractions more accessible. The Cayo district, in recent years, has become Belize's major eco-tourism destination. The interior Pine Ridge region is accessed through San Ignacio, the district's major town; many of the lodges that cater to foreign eco-tourists are found there. Cayo also contains or affords access to several important Mayan sites including Xunantunich and Caracol. The district is easily reached by travelling the main east-west road that links Belize City with the Guatemala border.

If Belizean tourism is to fulfill its potential and contribute to national development, planners must pay more attention to the four districts largely bypassed by tourism. Despite the presence of many appealing sites, accommodation and transport infrastructure lag behind in those areas. The two southern districts, Toledo and Stann Creek, are the poorest in Belize and merit special attention in national development plans. Completion of the Southern Highway will certainly help but consideration should be given toward ensuring that the real beneficiaries of that project are the current residents of those districts. A concern voiced at the Toledo district BTIA meeting in June 1998 was that flows of multinational capital, facilitated by the highway, would ultimately displace small, locally-owned establishments that now dominate the region's tourism profile (Nightingale, 1998). According to Kelvin Ramnarace, national BTIA director who was present at the meeting, such worries are not unique to Toledo district. The two northern districts, Orange Walk and Corozal, also remain marginalized within Belizean tourism, though both have strong agricultural sectors and are more prosperous than Toledo and Stann Creek. This relative prosperity, however, is now threatened by the loss of protected sugar markets; thus,

increased interest in developing their tourism industries can be anticipated.

Geopolitical Impacts on Belizean Tourism

Belize occupies a pivotal location in Central America's regionwide tourism planning but its ability to participate in this process has been compromised by a tenuous geopolitical situation. It agreed to independence from Britain only on the condition that 4000 British troops be stationed there to serve as a deterrent to Guatemalan expansionism. That country never recognized British hegemony over British Honduras; maps there display Belize as a Guatemalan department. Guatemalan instability and tendency toward militarism often makes Belizeans nervous but tensions have been reduced substantially during the 1990s. Belize now enjoys implicit, if not explicit, recognition by a neighbour who has ceased to block its entry into the various international fora that it has recently joined.

With the end of civil wars in El Salvador, Nicaragua, and Guatemala, regional leaders since 1990 have met about economic development rather than political problems. One initiative forthcoming from these meetings was the creation of the *Mundo Maya* Organization to foster tourism among the major Mayan sites of Mexico, Belize, Guatemala, Honduras, and El Salvador. The group promotes easier border crossing procedures, improved road linkages, joint marketing strategies, and a higher standard of living for the residents of the areas it serves (MMO, 1996). Recent excavations indicate that the well-known Guatemalan site of Tikal may, in fact, have been subservient to Caracol in southern Belize. This revelation and ongoing excavation projects at several other sites in Belize have elevated the country's profile in Mayanist circles and enhanced tourist interest. Thus, during the 1990s Belize has become a central player in Mayan archaeology, generating a positive impact on its tourism picture.

Belize's success as part of the Ruta Maya is heavily contingent upon its ability to maintain good relations with Guatemala, over which it has very little control. Its approaches to this issue have been to utilize the international support it enjoys, particularly from Mexico and the EU, as a deterrent to Guatemalan aggression.

Belize's Contemporary Mayan Population

Maya culture is not just a relic; there are three important Mayan groups living in Belize today, each with about 7000 people. The Yucatecan Maya of northern Belize are descendants of people who fled Mexico's War of the Castes during the 1840s, entering British Honduras as refugees. The other groups, the Mopan and Kekchi, live in the south, mostly in Toledo district. Their lineage includes the early inhabitants of the area and more recent arrivals from Guatemala; unlike the Yucatecan Maya, they live apart from other Belizeans in agricultural settlements where they farm land leased from the government.

The Mopan and Kekchi groups are currently engaged in two activities related to tourism. One involves filing a large land claim for a significant but sparsely settled portion of Toledo district. Representatives from Canadian "First Nations" who won their own land claims have been consulting with the Mopan and Kekchi, helping them prepare a claim to be filed in conjunction with a proposal to create a large eco-park in southern Belize. If successful, the claim will be the first of its kind in Belize and will alter the nature of development in Toledo. It exemplifies a grassroots, bottom-up movement aiming to reconcile cultural and environmental preservation with the development needs of people. This effort merits future research for its potential as a model for indigenous groups in Belize and elsewhere.

Also, the Toledo Eco-tourism Association (TEA) was established in the early 1990s by representatives of several indigenous villages in the district to raise the level of Maya participation in tourism. TEA philosophy emphasizes low-impact tourism that is both environmentally and culturally sensitive; it carries the additional aspect of trying to maximize benefits to those communities that serve as hosts to the visitors. The result is an unusual model of tourism. Tourists arrange village visits while in Punta Gorda, the major town in Toledo (or have done so by phone or fax prior to arriving there). They use local buses to go to the selected village where they stay in basic guest lodges built in the Maya style by families participating in the program. The lodges have no electricity or indoor plumbing but are very clean. Meals are taken with the families in their homes,

providing insights about contemporary Maya life. Each meal is taken in a different home, so that more families benefit from the program. Activities are available, including canoeing, nature walks, and cultural events. Payment is made at the end of one's stay and the money is divided among those who worked to host different aspects of the program according to a predetermined fee scale. The system is feasible because everyone in the villages, except the very old and pre-schoolers, speaks English well, enabling the visitors to communicate in tourism's international language.

The TEA program currently operates on a small scale and affects limited numbers of people. Completion of the Southern Highway may assist this effort by increasing the flow of foreign visitors into Toledo; conversely, if larger tourism development interests prevail, it could result in the ultimate failure of this unique initiative.

The Challenge of Marketing

Belize faces numerous challenges in marketing, an arena it has only recently entered in a serious manner. One challenge involves name recognition, in which it currently fares poorly but which is important in the destination selection process for most travelers. This can be achieved through advertising slogans like "It's Better in the Bahamas" and "Jamaica - No Problem." The BTB has recently begun print media promotional campaigns using "Belize: Friendly and Unspoiled," "Where the Caribbean meet Central America," and "Where the Caribbean meets the *Mundo Maya*" (Woods, 1998). These are too new as yet to gauge impact but are notable for the fact that they promote place as opposed to individual properties.

Another challenge involves reaching the potential visitors most likely to be interested in what the country has to offer. As noted above, independent travelers tend not to base their destination decisions on the advice of travel agents. They are also not a spatially concentrated market but can be reached through special interest publications devoted to activities that attract them, such as birdwatching, diving, environmental conservation, recreational fishing, and hiking. Market research indicates, however, that 70% of the tourists now visiting the country do consult travel agents when

booking their vacations (Woods, 1998). This necessitates improving the above-mentioned name recognition factor and distinguishing Belize from the multitude of other destinations that those people "sell" on a daily basis. This aspect of competition is a third marketing challenge, as so many countries face the same foreign exchange pressures as Belize. In an industry deluged with pamphlets promoting palm-fringed beaches and sunny skies, Belize must communicate the fact that it offers more.

Resources are necessary to overcome these challenges. With a small promotions budget too limited to finance a TV ad campaign, the BTB must make difficult choices to utilize its scarce funds effectively. It participates in trade shows in North America and Europe, employs a public relations firm in New York (Woods, 1998), and is considering opening an office in Germany, as recommended by the new plan (BMOTE, 1998). Unlike many Caribbean destinations where hotels owned by multinational chains are linked to international reservations systems and market their own properties (and host countries along with them), Belize must implement its own promotional programs to raise the country's tourism profile. It has begun to do this more comprehensively.

The newly issued *Tourism Strategy Plan for Belize* provides due emphasis upon the need for improved marketing if the country is to achieve its development goals in tourism. This ten-year plan analyzes ways of gaining a greater share of the current markets from which Belize draws its visitors, identifies new target markets as yet untapped by Belize, and highlights the need to distinguish Belize from other destinations. The plan's adoption was still under consideration during the period in 1998 when this research was conducted.

CONCLUSION

Whither Belizean tourism? The country finds itself at a critical juncture with regard to one of its most important industries. The choices it makes during the next few years will shape the nature of that industry for decades to come. Its challenge lies in finding the most effective means of deriving greater earnings from the industry without jeopardizing the pillars upon which it

has been constructed.

Belize must clearly determine its direction: what kind of destination does it wish to be? It lacks experience with mass tourism and currently does not have the facilities to accommodate the guests of that sub-sector. It enjoys a positive reputation for eco-tourism and already has excess capacity to house a larger number of visitors seeking those kinds of experiences. Given these facts, logic indicates that the country should focus upon what it already does well. It can expand within eco-tourism and closely related special-interest activities without necessitating massive amounts of new hotel construction. This would enable Belize to focus upon improving the transportation infrastructure needed to serve the sector, facilities that can be utilized by all Belizeans and other economic activities as well. It will also allow the country to devote its funds to more effective marketing designed to boost hotel occupancy rates and reduce seasonality fluctuations in the numbers of visitors.

With regard to the marketing issue, the BTB must find more effective ways of distinguishing Belize from its many competitors, particularly from other Caribbean destinations with whom it can not reasonably develop joint itineraries. The country's unique human and physical geography, its use of English, and its Mayan past offer a combination of travel experiences within a small area that is without equal in the region. This message must be communicated more effectively if Belize is to realize its goal of enhancing tourism earnings.

In the final analysis, much will depend upon how Belizean officials define national development. If measured primarily by inflows of capital for large-scale tourism development projects, mass-tourism and trickle-down economics may prevail. Should, however, those responsible for shaping the industry's future look closely at the greater employment impact and reduced leakages offered by continuing the emphasis upon small-scale tourism mostly under local and resident expatriate ownership, they will make appropriate choices that can lead to a sustainable industry oriented toward providing long-term contributions to national development.

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