



BELIZE TOURISM BOARD

Travel & Tourism Statistics Digest



FOREWORD

The Belize Travel and Tourism Statistics Digest is an annual compilation of statistics on the Tourism Industry of Belize. The Belize Tourism Board (BTB) wishes to thank the following organizations for providing us with the monthly and annual data that makes this publication possible:

Institute of Archaeology (IA)
Belize Audubon Society (BAS)
Department of Immigration & Nationality (DINS)
Hol Chan Marine Reserve (HCMR)
National Institute of Culture & History (NICH)
Statistical Institute of Belize (SIB)
Social Security Board (SSB)

Information has also been sourced from international bodies such as: Caribbean Tourism Organization (CTO)

Section 1 of this publication includes a summary of the overnight visitor arrival data derived from the information provided by the Immigration & Nationality Department. Section 2 provides a more detailed snapshot of the profile of the overnight visitors who come through the Philip S. W. Goldson International airport. Section 3 illustrates the results of the visitor exit survey conducted at the three main ports of entry. The survey was designed to capture travel motivation of overnight visitors, as well as their activities in country, expenditure and satisfaction rating. The performance of the cruise sector can be found in Section 4. Section 5 illustrates the number of visits to protected sites countrywide. Section 6 offers a glimpse of the performance of Belize's accommodation sector. Section 7 provides some information on the tourism service sector and also includes some regional tourism indicators.

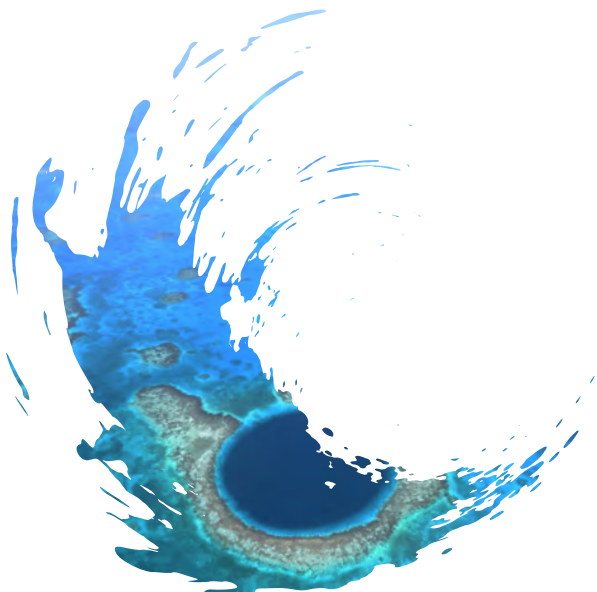
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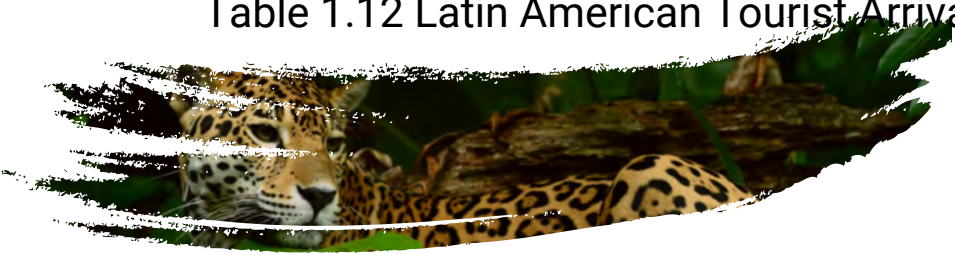
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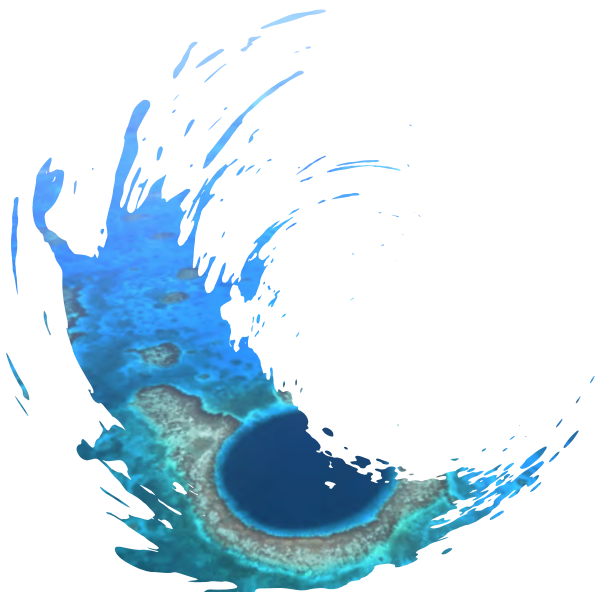
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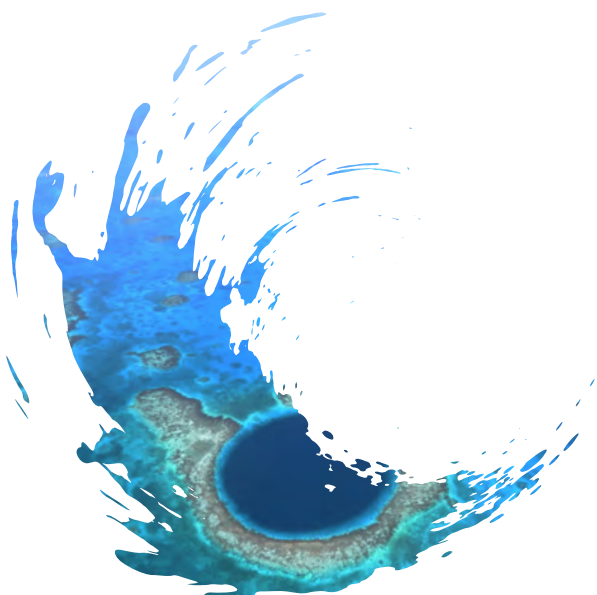
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BELIZE TOURISM BOARD



INTRODUCTION: IMPORTANT DEFINITIONS IN TOURISM

Tourism has developed into one of Belize's main industries and has become the country's number one foreign exchange earner. Tourism statistics allows the tourism board, tourism stakeholders, and other industry partners to analyze the growth of the tourism sector in comparison to previous years. It is important to understand the different terms used in the tourism industry and this digest. Therefore, a few main terms used are defined/explained below:

IRTS 2008, para 2.4: What is travel? Travel refers to the activity of travelers. A traveler is someone who moves between different geographic locations for any purpose and any duration.

RTS 2008 para 2.7: A trip refers to the travel by a person from the time of departure from his usual residence until he/she returns: it thus refers to a round trip. A trip is made up of visits to different places.

IRTS 2008 para 2.8: An inbound trip will correspond to the travel between arriving in a country and leaving. A domestic trip or an outbound trip will correspond to the travel between leaving the place of residence and returning: a domestic trip has a main destination in the country of residence of the traveler, while an outbound trip has a main destination outside this country.

IRTS 2008, para 2.9: Who is a visitor? A visitor is a traveler taking a trip to a main destination outside his/her usual environment for less than a year, for any main purpose (business,leisure, or other personal purpose) other than to be employed by a resident entity in the country or place visited. These trips taken by visitors qualify as tourism trips. Tourism refers to the activity of visitors.

INTRODUCTION: IMPORTANT DEFINITIONS IN TOURISM

IRTS 2008, para 2.12: Tourism is therefore a subset of travel, and visitors are a subset of travelers. These distinctions are crucial for the compilation of data on the flow of travelers and visitors, and for the credibility of tourism statistics.

IRTS 2008 para. 2.13: A visitor (domestic, inbound or outbound) is classified as a tourist or overnight visitor, if his/her trip includes an overnight stay.

IRTS 2008, para 2.21: The usual environment of an individual is a key concept in tourism. It is defined as the geographical area (though not necessarily a contiguous one) within which an individual conducts his/her regular life routines.

Frequency of the trip: Regular is excluded; daily shopping, school

Duration of the trip: One year or longer is excluded. The crossing of administrative or national borders (i.e. municipality)

Distance from the place of usual residence (i.e. outside municipality).

Business Visitor (BV) : A business visitor is a visitor whose main purpose for a trip corresponds to the business, technical and professional category.

Official Visitor (OV) : Foreigners coming to Belize on official visits with Official Passports.

INTRODUCTION: IMPORTANT DEFINITIONS IN TOURISM

Educational Visitor (EDU) : A visitor coming into the country for short-term education-related purposes, with length of stay exceeding one day.

Health Related/ Medical Visitor (MV) : A visitor coming into the country for the sole purpose of receiving short-term medical treatment or improving health or fitness.

Religious Visitors (RT) : A religious visitor is a visitor whose main purpose of visit is specifically tied to their religious ideology or affiliation.

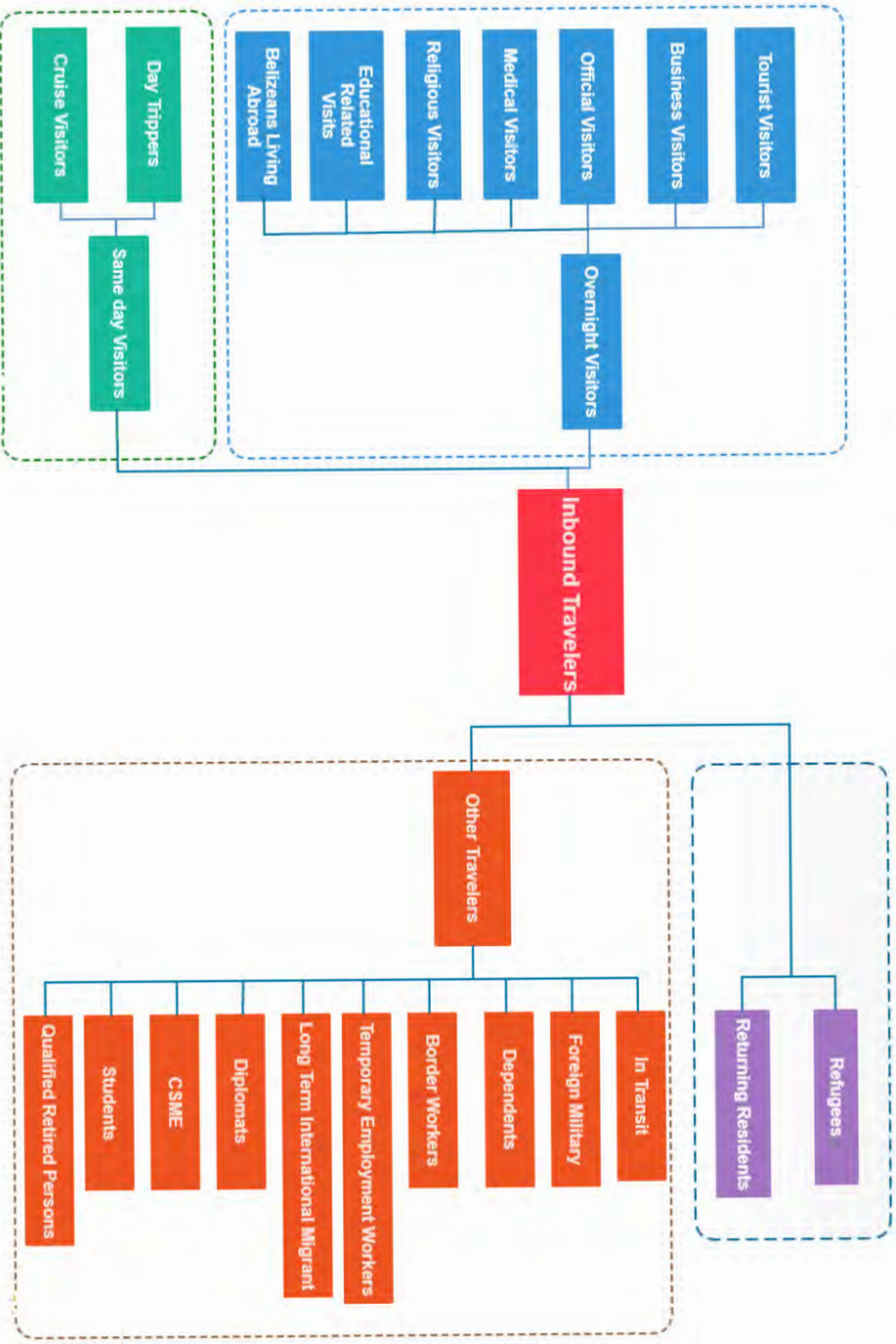
Belizeans Living Abroad (BLA) : This category refers to persons who live abroad and are therefore considered non-resident visitors for tourism purposes, but who have retained the nationality of the reference country.

Same-day visitor/ Excursionist : A visitor (domestic, inbound or outbound) is classified as an excursionist (or same-day visitor) if their trip does not include an overnight stay.

Cruise Visitors (CV): Cruise passengers who come to Belize on a sight-seeing trip and only spend a few hours in the country.

Day Trippers (DT): Visitors who travel to Belize for personal or business purposes such as shoppers, medical patients etc; but who only spend a few hours in the country and leave the same day.

Types of Inbound Travelers Arriving in Belize



OVERNIGHT

Tourist Arrivals

2011-2017



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Section I

'A visitor (domestic, inbound or outbound) is classified as an overnight visitor if his/her trip includes an overnight stay.'



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Overnight Tourist Arrivals to Belize

The overnight sector is the backbone of Belize's tourism industry. The overnight sector has experienced sustained annual growth in arrivals over the past 7 years. Over the past two years there has been only one monthly decrease in tourism arrivals which occurred in November 2016. In 2017, there was an increase in arrivals in all 12 months of the year, a feat that was only duplicated once before in 2012. In 2017 Overnight tourist arrivals also eclipsed 400,000 visitors for the first time in Belize's history. Monthly overnight arrivals exceeded 44,000 visitors in March and surpassed 49,000 in December 2017.

The increase in overnight arrivals can be attributed to a variety of factors. In recent years there has been increased investment in tourism infrastructural development projects by the Government of Belize and private sector entities. There have also been improved marketing efforts spearheaded by the Belize Tourism Board in partnership with the private sector. Historically, these marketing efforts have been concentrated in traditional markets such as the United States, Canada and Europe. However, recently there has been an added focus on marketing Belize in other regions as well - specifically South America and Mexico. This has yielded positive results in relatively short order, as we have seen sharp growth in overnight arrivals from those particular regions of the world in 2017.

Another major contributing factor to the increased overnight arrivals to Belize is additional airlift capacity, with new airlines offering seasonal direct flights from Belize to Canada. The introduction of Westjet from Calgary and Air Canada from Toronto; has boosted overnight arrival numbers from Canada in recent months. Both airlines began service to Belize in late 2016 and late 2017 respectively. There was also the launch of two Southwest Airlines flights in 2017: one from Fort Lauderdale, Florida and another from Denver, Colorado.



Table 1.1

	2011	2012	2013	2014	2015	2016	2017	% Change
JANUARY	23,592	24,263	28,431	31,164	30,858	38,274	38,531	0.7
FEBRUARY	23,854	25,778	28,765	32,105	31,754	37,624	39,221	4.2
MARCH	28,643	32,240	35,795	38,712	39,136	43,063	44,475	3.3
APRIL	23,585	23,699	23,555	28,969	27,569	30,656	38,090	24.2
MAY	19,289	22,106	22,941	26,319	24,707	29,709	32,146	8.2
JUNE	21,755	24,615	26,817	28,727	29,188	34,268	37,690	10.0
JULY	24,042	25,778	27,833	29,983	30,967	36,212	38,628	6.7
AUGUST	17,735	19,528	20,863	22,672	23,874	25,865	30,799	19.1
SEPTEMBER	9,823	11,743	10,654	11,943	14,276	18,115	19,508	7.7
OCTOBER	12,093	14,498	14,543	15,511	18,945	21,726	22,656	4.3
NOVEMBER	18,908	21,542	22,868	22,488	29,909	29,510	36,203	22.7
DECEMBER	26,945	31,346	31,111	32,624	39,977	40,561	49,131	21.1
	250,263	277,135	294,177	321,220	341,161	385,583	427,076	10.8

OVERNIGHT TOURIST ARRIVALS BY MONTH



Table 1.2

	2011	2012	2013	2014	2015	2016	2017	% Change
1 st Quarter	76,089	82,282	92,992	101,982	101,748	118,961	122,227	2.7
2 nd Quarter	64,628	70,419	73,313	84,016	81,465	94,633	107,925	14.0
3 rd Quarter	51,600	57,049	59,350	64,598	69,117	80,192	88,934	10.9
4 th Quarter	57,946	67,385	68,522	70,624	88,831	91,797	107,990	17.6
	250,263	277,135	294,177	321,220	341,161	385,583	427,076	10.8

OVERNIGHT TOURIST ARRIVALS BY QUARTER

Fig 1.1

Overnight Tourist Arrivals By Month

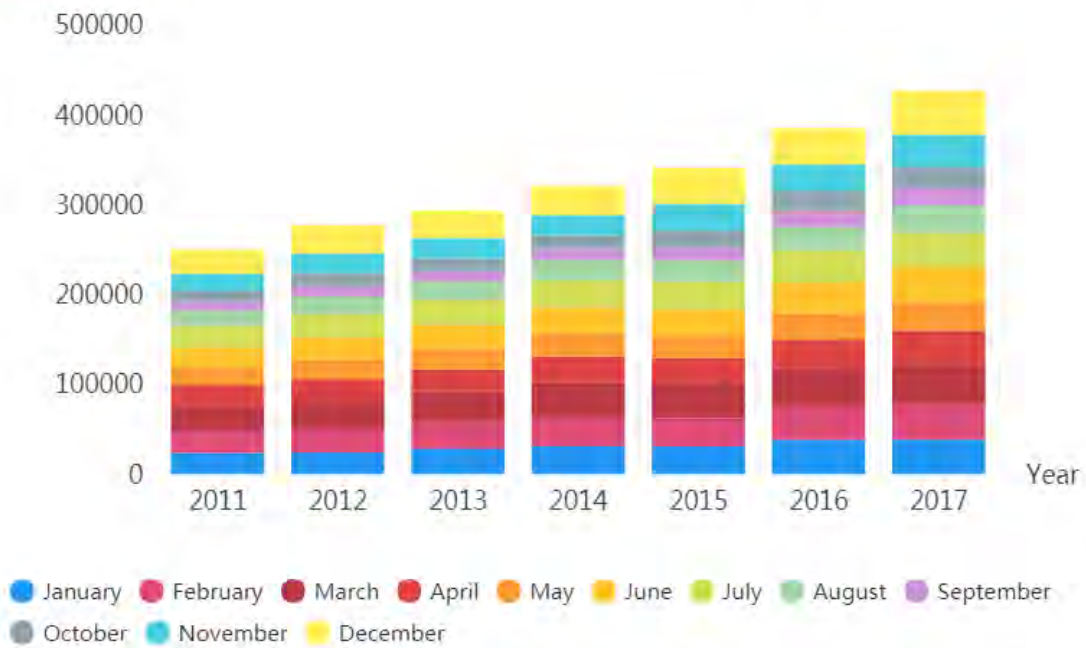


Fig 1.2

Overnight Tourist Arrivals By Quarter

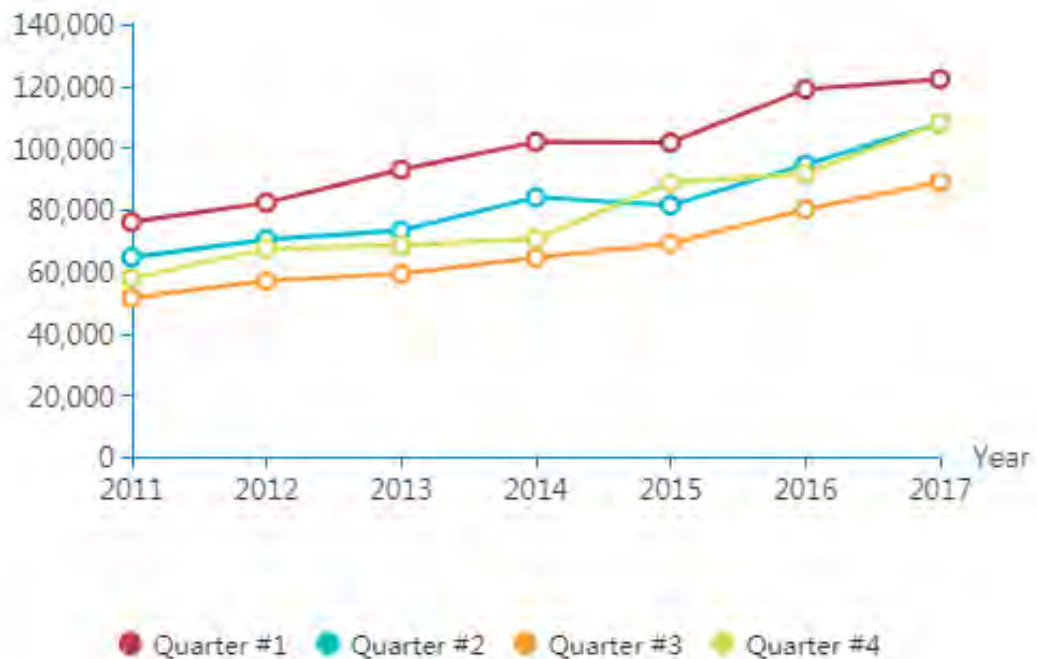




Table 1.3

	2011	2012	2013	2014	2015	2016	2017	% Change
"Winter"	99,673	105,981	116,547	130,952	129,317	149,617	160,316	7.2
Summer	150,590	171,154	177,630	190,268	211,844	235,966	266,760	13.0
	250,263	277,135	294,177	321,220	341,161	385,583	427,076	10.8

OVERNIGHT TOURIST ARRIVALS BY SEASON

In Belize there are only two main seasons in a year: The dry season and the rainy season. The rainy season occurs in the summer months and lasts through October. However, for the purpose of regional comparison of data, the seasons above are split into two specific time frames. The time period labelled as "winter" above, corresponds to the months of January through April. Summer refers to the remaining months of the year.




Table 1.4

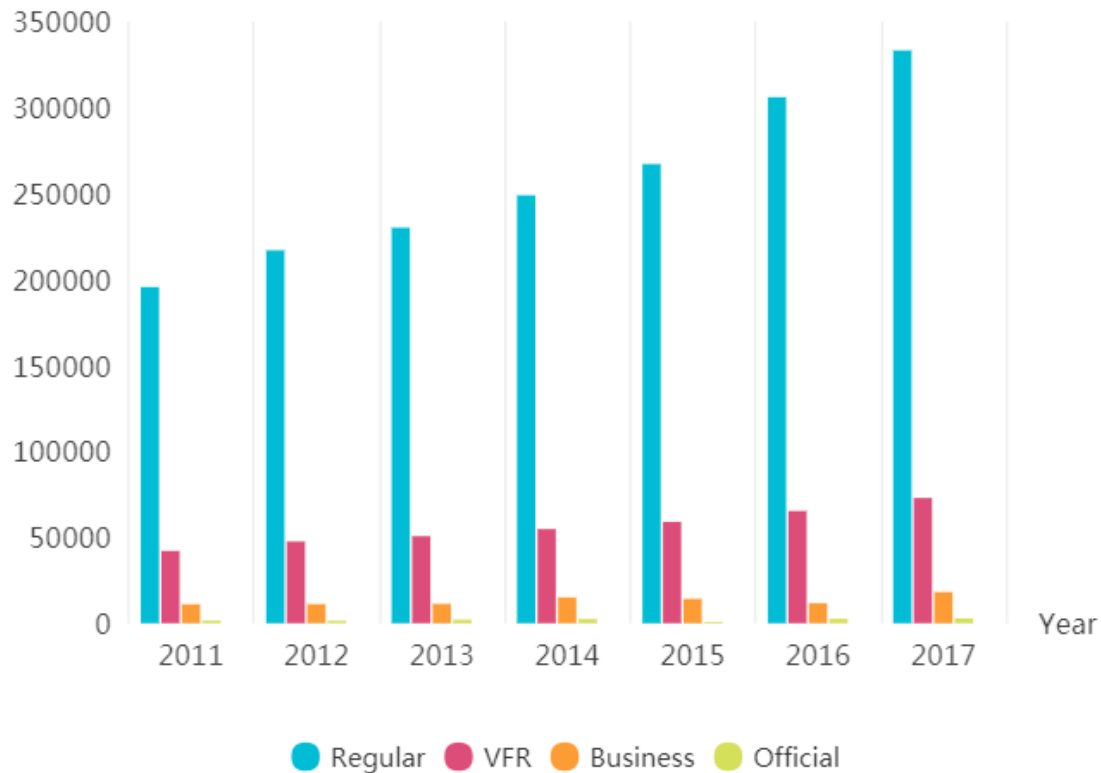
	2011	2012	2013	2014	2015	2016	2017	% Change
Regular	195,603	216,979	230,118	248,957	267,136	306,040	333,223	8.9
VFR	42,082	47,548	50,664	54,781	58,993	65,319	72,902	11.6
Business	11,031	11,118	11,281	15,035	14,203	11,660	18,112	55.3
Official	1,547	1,490	2,114	2,447	829	2,564	2,839	10.7
	250,263	277,135	294,177	321,220	341,161	385,583	427,076	10.8

OVERNIGHT TOURIST ARRIVALS BY PURPOSE OF VISIT

Purpose of visit can be dis-aggregated into different combinations of categories. The categories above are the visitor types in their most basic form. The abbreviation "VFR" refers to those persons whose main purpose of travel is to visit friends and relatives.

Fig 1.3

Overnight Tourist Arrivals by Purpose of Visit



PGIA - Philip Goldson International Airport (only international airport)

SLA - Santa Elena Border Station - Northern Border with Mexico (land)
BWBS - Belize Western Border Station - Western border with Guatemala (land)

SCK - Dangriga Town & Big Creek Seaports in the Stann Creek District - Southern Region (sea)

PGA - Punta Gorda Town Seaport in the Toledo District - Southern Region (sea)

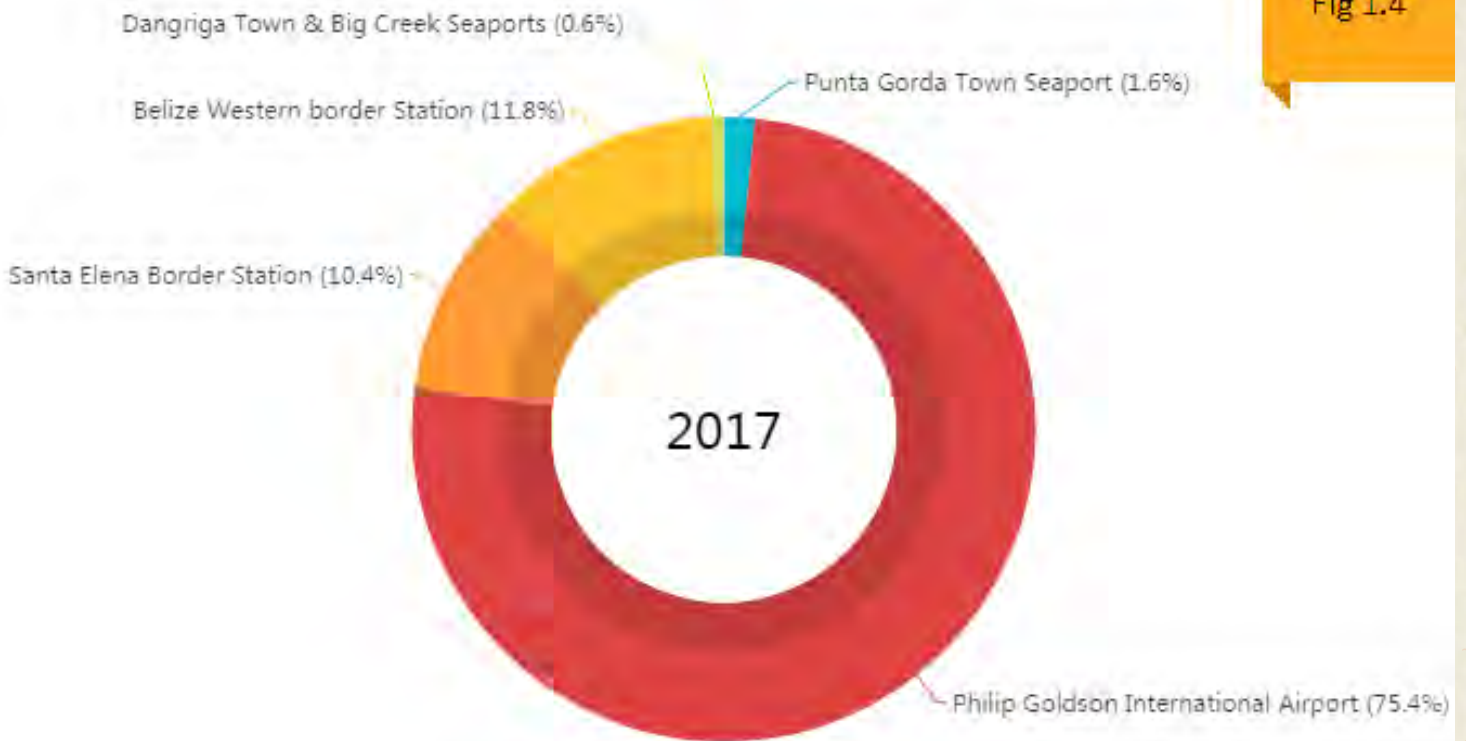




	2011	2012	2013	2014	2015	2016	2017	% Change
PGIA	181,996	211,781	223,510	239,255	255,923	298,157	322,167	8.1
SLA	28,710	29,886	31,369	38,675	40,911	40,336	44,621	10.6
BWBS	27,797	24,972	28,753	32,763	34,714	38,060	50,572	32.9
SCK	4,127	3,241	2,997	3,197	3,167	3,464	2,731	-21.2
PGA	7,633	7,255	7,548	7,330	6,446	5,566	6,985	25.5
	250,263	277,135	294,177	321,220	341,161	385,583	427,076	10.8

OVERNIGHT TOURIST ARRIVALS BY PORTS OF ENTRY

Overnight Tourist Arrivals by Ports of Entry

Fig 1.4



	2011	2012	2013	2014	2015	2016	2017	% Change
America	156,293	176,642	183,513	199,320	215,221	254,544	276,566	8.7
Europe	30,142	29,362	32,191	38,905	40,941	42,635	50,122	17.6
Latin America	24,692	23,809	27,941	29,461	30,507	35,202	44,207	25.6
Canada	20,093	24,223	26,713	26,397	24,026	21,867	26,084	19.3
Belizeans Living Abroad	10,157	12,102	11,489	13,858	15,170	14,861	13,488	-9.2
Oceania	2,741	3,490	4,431	5,150	5,609	6,220	5,789	-6.9
Asia	2,995	3,443	3,430	2,911	4,088	4,670	5,169	10.7
Caribbean	2,049	2,288	2,179	2,269	2,639	2,820	2,992	6.1
Middle East	628	1324	1,885	2,495	2,360	2,160	2,018	-6.6
Africa	472	453	403	454	602	605	674	11.4
	250,263	277,135	294,177	321,220	341,161	385,583	427,076	10.8

OVERNIGHT TOURIST ARRIVALS BY ORIGIN REGION





Table 1.7

	2011	2012	2013	2014	2015	2016	2017
America	62.5	63.7	62.4	62.1	63.1	62.5	64.8
Europe	12.0	10.6	11.0	12.1	12.0	12.0	11.7
Latin America	9.9	8.6	9.5	9.2	8.9	9.9	9.9
Canada	8.0	8.7	9.1	8.2	7.0	8.0	6.1
Belizeans Living Abroad	4.1	4.4	3.9	4.3	4.4	4.1	3.2
Oceania	1.1	1.3	1.5	1.6	1.6	1.1	1.4
Asia	1.2	1.2	1.2	0.9	1.2	1.2	1.2
Caribbean	0.8	0.8	0.7	0.7	0.8	0.8	0.7
Middle East	0.2	0.5	0.6	0.8	0.7	0.2	0.5
Africa	0.2	0.2	0.1	0.1	0.2	0.2	0.2
	100.0	100.0	100.0	100.0	100.0	100.0	100.0

OVERNIGHT TOURIST ARRIVALS BY ORIGIN REGION – MARKET SHARE (%)



Fig 1.5

Overnight Tourist Arrivals By Country/Origin Region - 2017

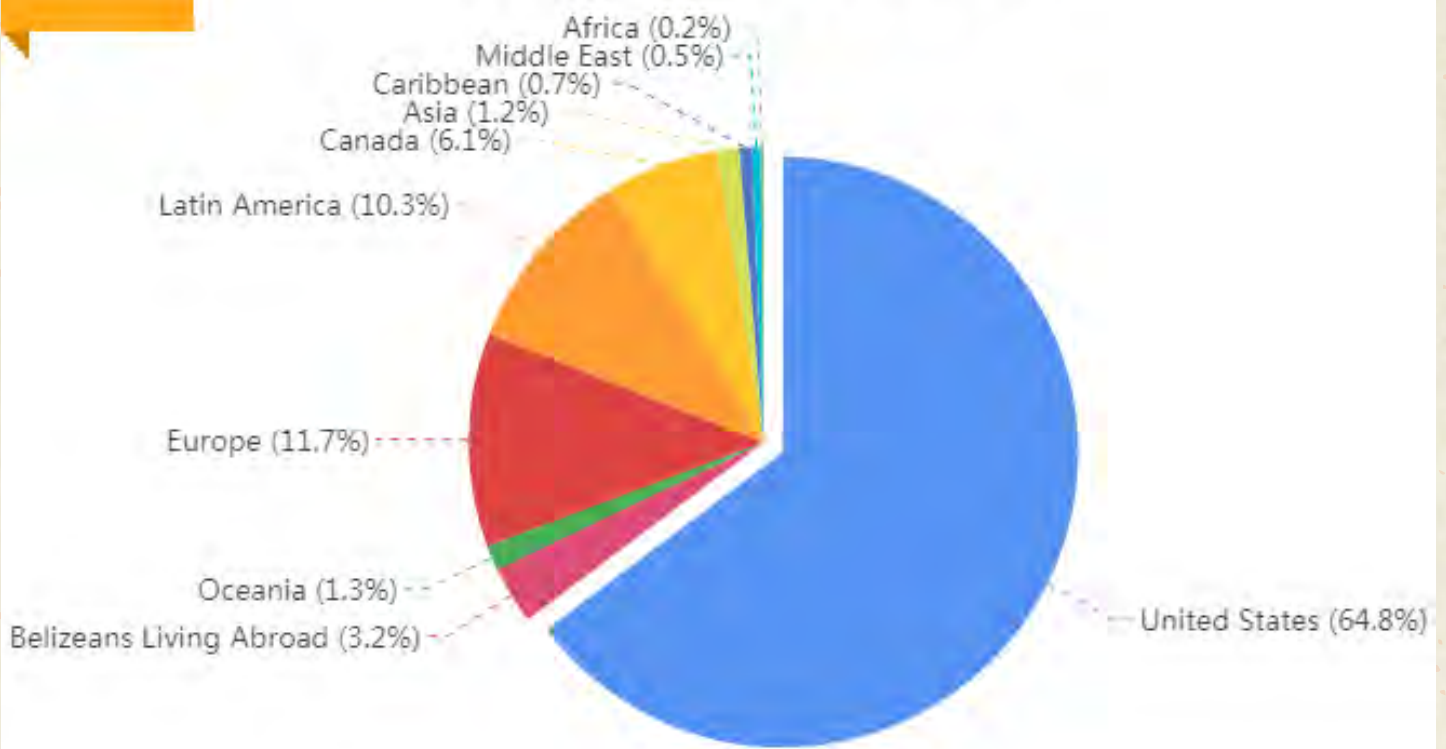




Table 1.8

	2011	2012	2013	2014	2015	2016	2017	% Change
JANUARY	14,229	15,094	16,476	18,297	17,991	24,484	23522	-3.9
FEBRUARY	14,808	15,909	16,848	19,151	19,075	25,281	24821	-1.8
MARCH	19,984	21,677	23,538	25,679	25,282	29,580	30692	3.8
APRIL	14,273	14,375	14,162	17,089	16,864	21,016	24404	16.1
MAY	12,650	14,754	14,948	17,271	15,903	20,495	22476	9.7
JUNE	16,092	18,847	20,078	21,073	21,835	26,391	28781	9.1
JULY	15,719	17,903	18,682	19,976	20,783	25,600	28319	10.6
AUGUST	9,435	11,562	11,802	12,740	13,347	14,856	16815	13.2
SEPTEMBER	4,860	6,262	5,704	5,817	7,375	10,183	10820	6.3
OCTOBER	6,582	8,190	8,507	8,821	12,101	13,020	13817	6.1
NOVEMBER	10,770	12,730	13,257	13,188	18,481	17,445	20636	18.3
DECEMBER	16,890	19,337	19,510	20,219	26,183	26,192	31463	20.1
	156,293	176,642	183,513	199,320	215,221	254,544	276,566	8.7

AMERICAN TOURIST ARRIVALS BY MONTH

Fig 1.6

American Tourist Arrivals By Month

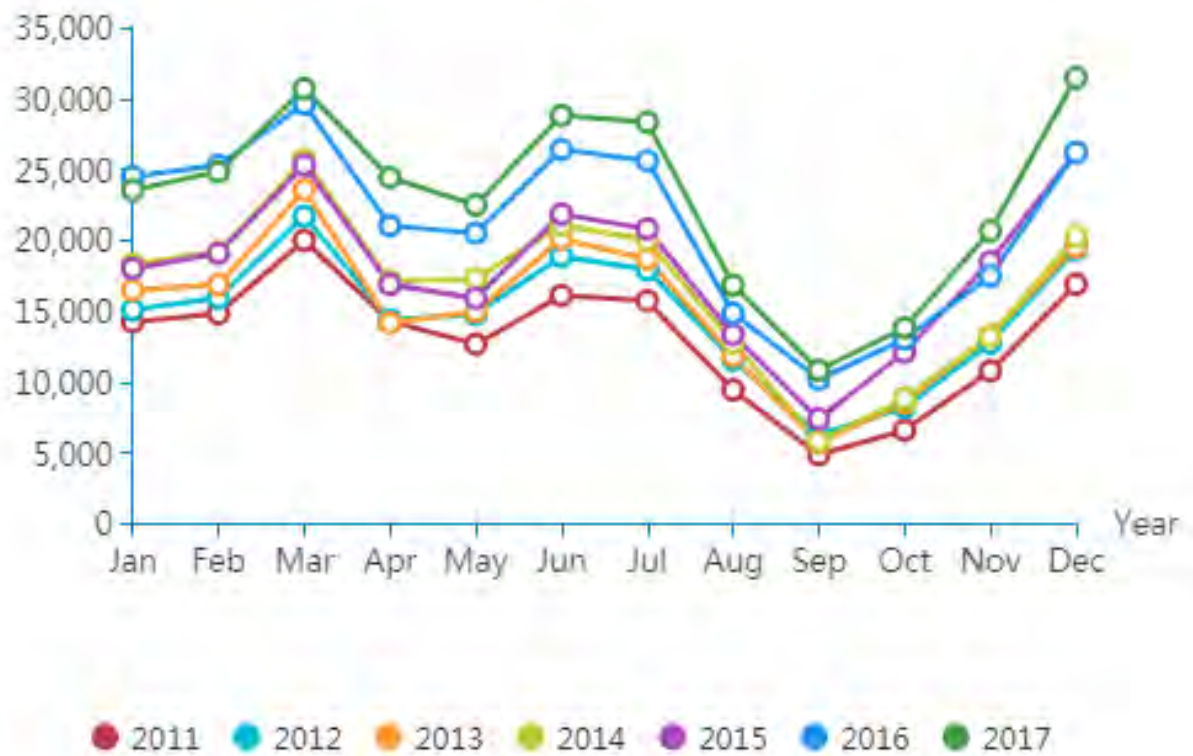




Table 1.9

	2011	2012	2013	2014	2015	2016	2017	% Change
JANUARY	2,765	2,667	3,427	4,229	4,397	4,755	5,045	6.1
FEBRUARY	2,874	2,785	3,218	4,047	4,153	4,454	5,070	13.8
MARCH	2,758	3,264	3,362	4,395	4,434	4,687	4,433	-5.4
APRIL	3,092	2,579	2,814	3,633	3,593	3,363	4,400	30.8
MAY	2,114	2,044	2,146	2,532	2,670	2,752	2,828	2.7
JUNE	1,686	1,633	1,895	1,935	2,014	2,131	2,372	11.3
JULY	2,954	2,602	2,967	3,473	3,759	3,625	3,726	2.8
AUGUST	3,383	2,703	3,004	3,802	3,909	4,194	5,893	40.5
SEPTEMBER	1,237	1,294	1,035	1,503	1,794	2,049	2,201	7.4
OCTOBER	1,573	1,531	1,856	1,847	1,794	2,293	3,129	36.4
NOVEMBER	2,753	2,835	3,074	3,383	3,942	3,992	5,510	38.0
DECEMBER	2,953	3,425	3,394	4,125	4,480	4,338	5,514	27.1
	30,142	29,362	32,191	38,905	40,941	42,635	50,122	17.6

EUROPEAN TOURIST ARRIVALS BY MONTH

Fig 1.7

European Tourist Arrivals By Month

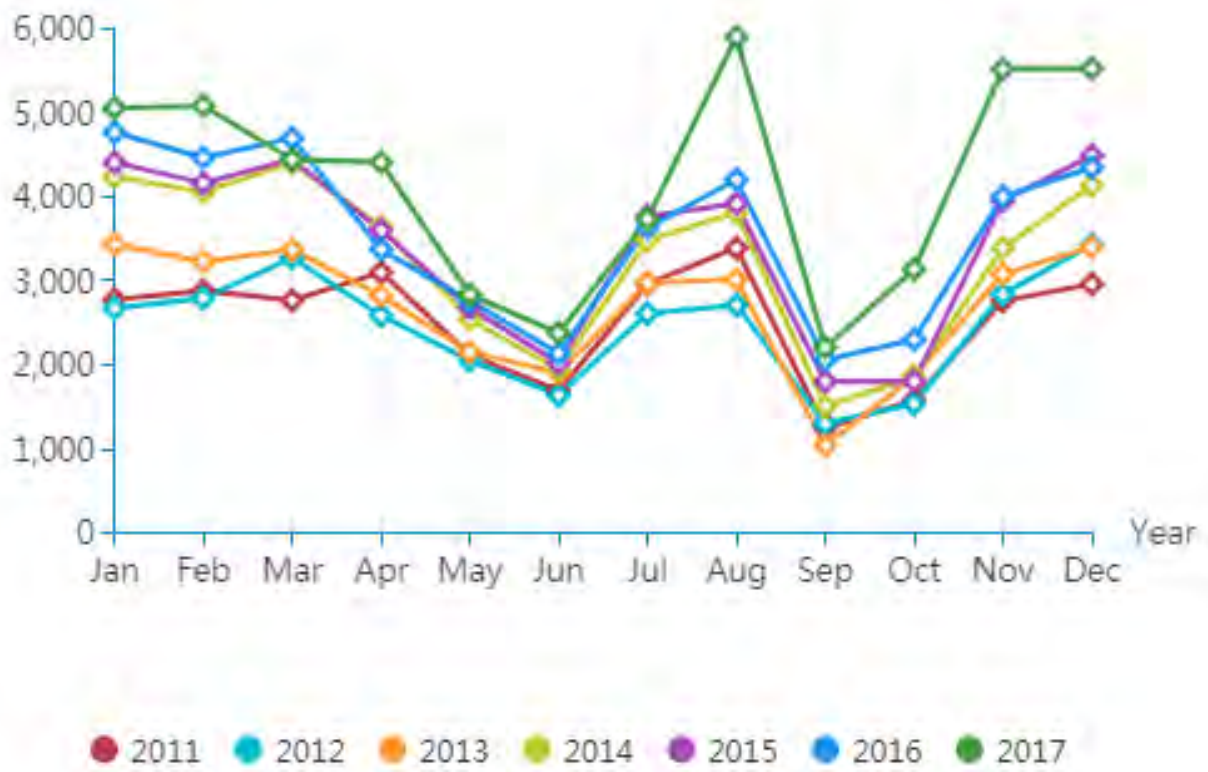




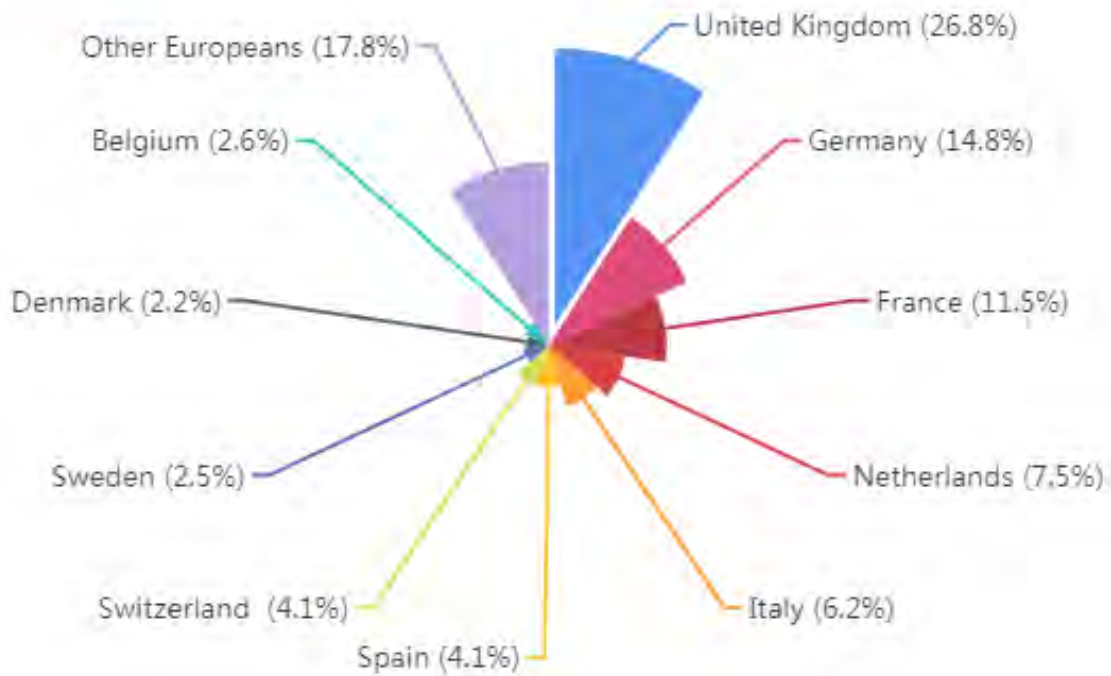
Table 1.10

	2011	2012	2013	2014	2015	2016	2017	% Change
United Kingdom	8,199	7,981	9,070	11,357	12,650	13,342	13,444	0.8
Germany	3,262	3,525	3,961	5,065	5,443	5,988	7,402	23.6
France	3,101	3,308	3,070	4,132	4,283	4,568	5,751	25.9
Netherlands	2,869	2,384	2,520	2,582	2,802	2,849	3,753	31.7
Italy	2,218	1,774	1,694	2,552	2,543	2,775	3,107	12.0
Spain	1,440	1,244	1,391	1,599	1,708	1,997	2,062	3.3
Switzerland	1,021	905	1,041	1,296	1,396	1,501	2,037	35.7
Sweden	847	1,018	1,093	1,489	1,324	1,213	1,242	2.4
Denmark	947	729	1,114	1,107	898	879	1,111	26.4
Belgium	531	858	695	918	906	850	1,288	51.5
Other Europeans	5,707	5,636	6,543	6,809	6,988	6,674	8,927	33.8
	30,142	29,362	32,191	38,905	40,941	42,635	50,123	17.6

EUROPEAN TOURIST ARRIVALS BY ORIGIN REGION

Fig 1.8

Overnight Arrivals by European Country - 2017



The Canadian market experienced significant growth in 2017 after a less than stellar performance in 2016. This growth can be largely attributed to the introduction of two direct flights from Canada to Belize in late 2016 and late 2017 respectively. The 19.3% growth in arrivals in 2017 is the largest percentage growth seen in the Canadian market in the last five years.




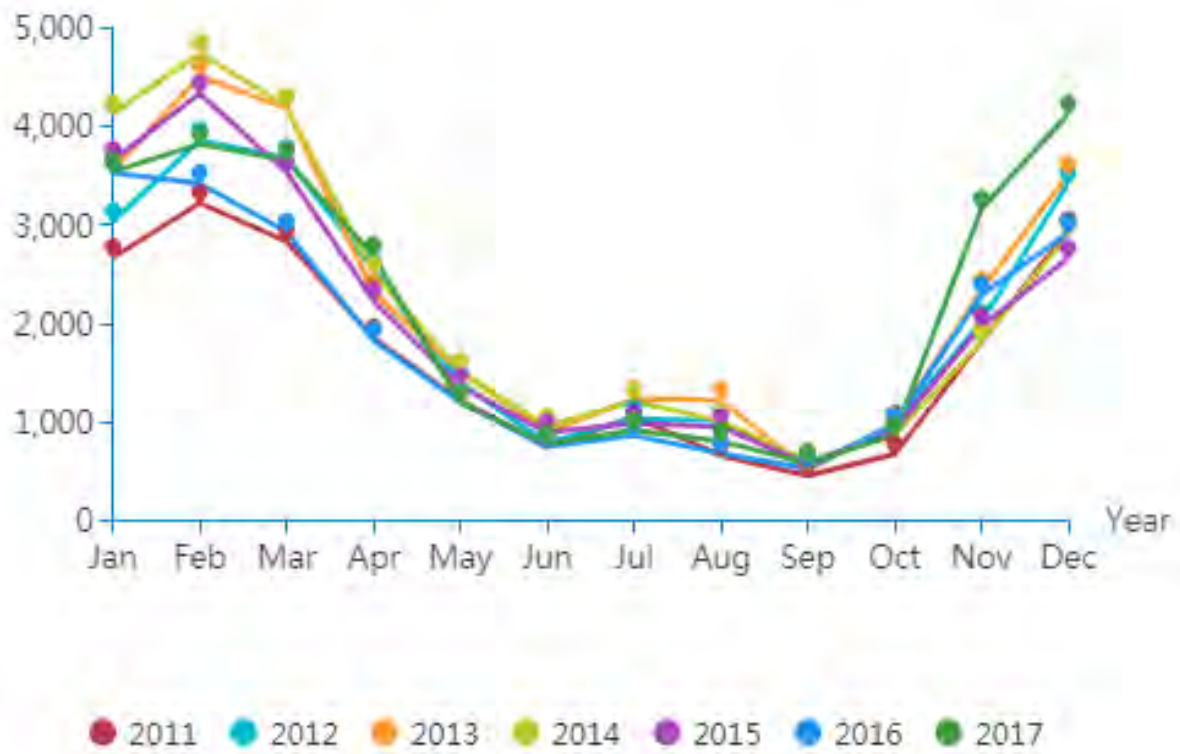
Table 1.11

	2011	2012	2013	2014	2015	2016	2017	% Change
JANUARY	2,664	3,029	3,549	4,119	3,650	3,523	3,535	0.3
FEBRUARY	3,215	3,852	4,504	4,736	4,327	3,414	3,815	11.7
MARCH	2,827	3,672	4,174	4,194	3,530	2,923	3,648	24.8
APRIL	1,847	2,537	2,308	2,506	2,226	1,824	2,686	47.3
MAY	1,218	1,393	1,507	1,511	1,358	1,198	1,192	-0.5
JUNE	742	783	890	955	891	749	779	4.0
JULY	1,050	1,034	1,234	1,208	985	860	911	5.9
AUGUST	657	1,008	1,220	1,008	946	680	802	17.9
SEPTEMBER	453	527	511	597	574	526	581	10.5
OCTOBER	669	967	983	866	914	969	867	-10.5
NOVEMBER	1,812	2,007	2,330	1,808	1,969	2,286	3,154	38.0
DECEMBER	2,939	3,415	3,505	2,889	2,657	2,914	4,116	41.2
	20,093	24,223	26,713	26,397	24,026	21,867	26,084	19.3

CANADIAN TOURIST ARRIVALS BY MONTH

Fig 1.9

Canadian Tourist Arrivals By Month



Latin America consists of countries from different continents which have been placed under this classification for specific reporting purposes. These countries include Mexico and the countries within South and Central America (not including Belize). There was over 50% growth in the Mexican market and over 33% growth in the South American market in 2017. This growth was a major factor in the robust overall growth seen in the Latin American Market in 2017.



Table 1.12

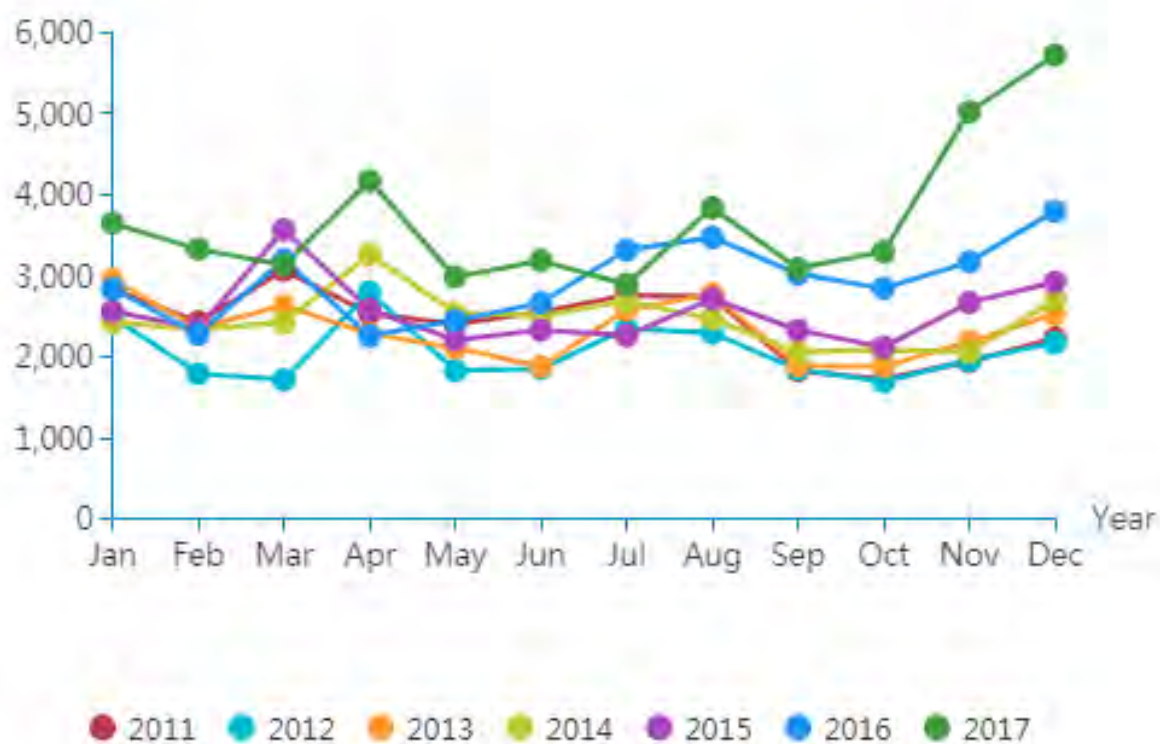
	2011	2012	2013	2014	2015	2016	2017	% Change
JANUARY	2,827	2,483	2,941	2,417	2,551	2,831	3,640	28.6
FEBRUARY	2,423	1,785	2,345	2,331	2,342	2,270	3,320	46.3
MARCH	3,057	1,708	2,624	2,414	3,558	3,188	3,126	-1.9
APRIL	2,525	2,791	2,273	3,252	2,575	2,251	4,159	84.8
MAY	2,395	1,823	2,103	2,533	2,202	2,439	2,975	22.0
JUNE	2,544	1,844	1,870	2,498	2,319	2,657	3,178	19.6
JULY	2,750	2,341	2,567	2,676	2,255	3,307	2,883	-12.8
AUGUST	2,734	2,286	2,767	2,463	2,706	3,464	3,830	10.6
SEPTEMBER	1,819	1,837	1,883	2,054	2,318	3,015	3,082	2.2
OCTOBER	1,713	1,686	1,873	2,079	2,111	2,834	3,289	16.1
NOVEMBER	1,935	1,945	2,178	2,050	2,660	3,161	5,012	58.6
DECEMBER	2,221	2,163	2,517	2,693	2,911	3,786	5,712	50.9
	24,692	23,809	27,941	29,461	30,507	35,202	44,207	25.6

LATIN AMERICAN TOURIST ARRIVALS BY MONTH



Fig 1.10

Latin American Tourist Arrivals By Month



OVERNIGHT

Arrivals via International Airport

2011-2017



INCLUDING
REPORTS FROM
CTO'S

TIMS PLATFORM

Section II



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Airport Tourist Arrivals

The vast majority of overnight visitor arrivals to Belize come through the Philip S.W. Goldson International Airport (the PGIA) . The PGIA is the largest port of entry in the country, welcoming over 75% of international tourist visitors annually. When assessing the weekly trends of visitor arrivals, the undulation of arrivals through the international airport provides a more than sufficient barometer for what the total monthly visitor arrival figure is going to be. Trends for arrivals through the airport mirror the overall visitor arrival trends to a very significant degree. This approximation is most reliable when looking at arrival patterns for specific nationalities, including North American arrivals. The approximation does not work as well for visitors from Europe however, because Europeans tend to make use of the land borders as a viable port of entry more so than visitors from some of the other main markets.

Reports from CTO TIMS Platform

In addition to the monthly summarized reports on visitor arrivals through the airport that the BTB receives from the Immigration Department, the Immigration ED cards are also collected by month. Certain key fields of information from the ED cards that are relevant to tourism and tourism related activity, are entered into a database. This database is connected to a Management Information System platform, from which standardized and ad-hoc reports on tourism indicators can be extracted. A few examples of these reports are included in the latter part of this section of the publication.

Table 2.1

	2011	2012	2013	2014	2015	2016	2017	% Change
JANUARY	16,799	18,558	19,965	22,562	21,974	28,490	28,025	-1.6
FEBRUARY	18,155	20,450	21,676	24,148	24,079	29,666	30,135	1.6
MARCH	22,988	25,982	28,623	30,754	30,032	33,927	35,643	5.1
APRIL	16,669	17,969	17,424	21,028	20,397	24,725	29,686	20.1
MAY	14,253	17,214	17,699	19,924	18,965	23,408	25,542	9.1
JUNE	16,847	20,212	21,820	22,801	23,491	28,753	30,716	6.8
JULY	16,935	19,935	21,220	22,490	24,020	29,605	32,759	10.7
AUGUST	11,238	13,844	15,296	15,680	16,287	18,292	20,717	13.3
SEPTEMBER	6,078	7,914	7,616	7,692	9,222	12,788	12,932	1.1
OCTOBER	8,000	10,325	10,869	11,066	14,720	15,766	15,896	0.8
NOVEMBER	13,387	16,098	17,031	16,581	22,252	21,879	24,394	11.5
DECEMBER	20,648	23,312	24,270	24,528	30,484	30,858	35,721	15.8
	181,996	211,811	223,510	239,255	255,923	298,157	322,167	8.1

AIRPORT TOURIST ARRIVALS BY MONTH

Fig 2.1

Airport Tourist Arrivals By Month





Table 2.2

	2011	2012	2013	2014	2015	2016	2017	% Change
1st Quarter	57,942	64,989	70,264	77,464	76,084	92,083	93,804	1.9
2nd Quarter	47,769	55,395	56,944	63,754	62,853	76,886	85,943	11.8
3rd Quarter	34,251	41,693	44,133	45,862	49,529	60,685	66,409	9.4
4th Quarter	42,034	49,735	52,170	52,175	67,456	68,503	76,011	11.0
	181,996	211,811	223,510	239,255	255,923	298,157	322,167	8.1

AIRPORT TOURIST ARRIVALS BY QUARTER

Fig 2.2

Airport Tourist Arrivals By Quarter

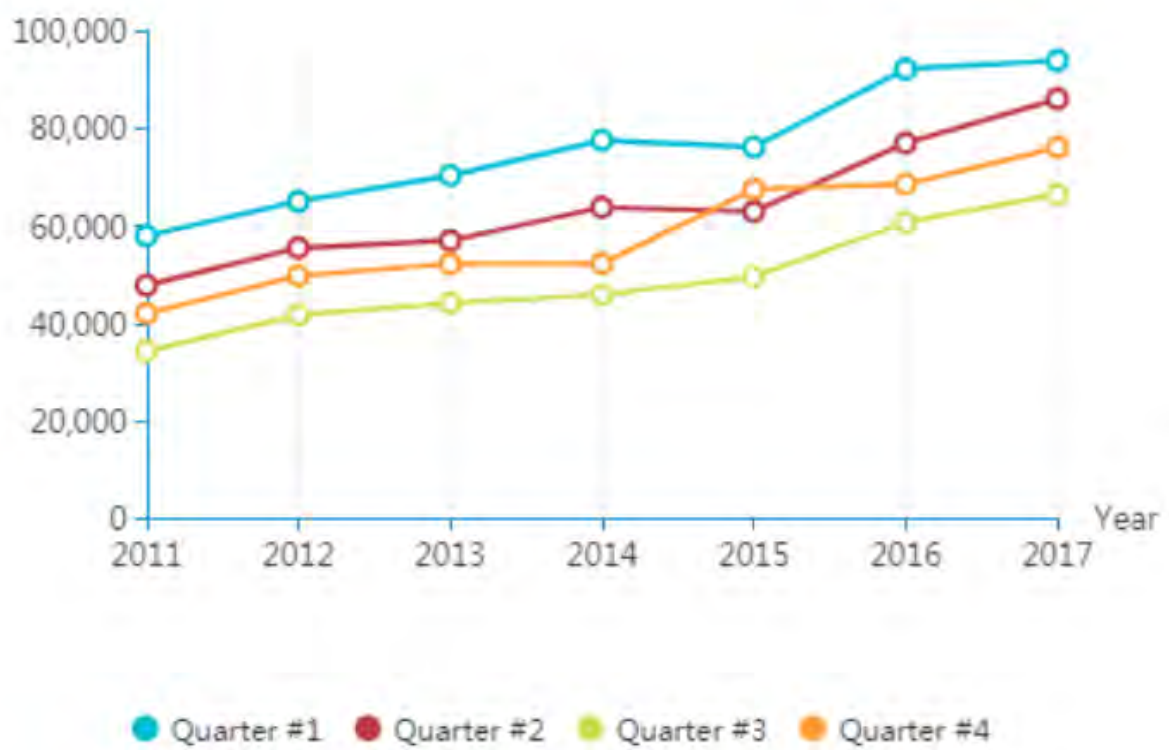




Table 2.3

	2011	2012	2013	2014	2015	2016	2017	% Change
"Winter"	74,611	82,957	87,687	98,492	96,482	116,808	123,490	5.7
Summer	107,385	128,854	135,822	140,763	159,441	181,348	198,677	9.6
	181,996	211,811	223,510	239,255	255,923	298,157	322,167	10.8

AIRPORT TOURIST ARRIVALS BY SEASON



The remaining tables in this section of the publication are a few examples of reports that can be generated from the Caribbean Tourism Organization's (CTO's) Tourism Information Management System platform.

* Note that the 2017 information is based on data collected only during the first five months of the year.



Table 2.4

	Less than 4 days	4 – 7 Days	8 – 10 Days	More than 10 days	Not Stated	TOTAL VISITORS
2015	Percent	Percent	Percent	Percent	Percent	#
Australia	12.4%	46.9%	23.7%	16.0%	1.0%	1,050
Canada	3.2%	23.1%	47.8%	23.7%	2.3%	19,274
Europe	9.7%	24.7%	34.5%	28.0%	3.1%	15,454
Latin America	31.7%	34.6%	10.8%	21.7%	1.3%	10,041
United States of America	5.2%	51.4%	31.3%	11.3%	0.7%	211,259
Other	18.4%	32.4%	17.0%	31.4%	0.9%	4,097

Airport Arrivals - Days Stayed by Origin Region




Table 2.5

	Less than 4 days	4 – 7 Days	8 – 10 Days	More than 10 days	Not Stated	TOTAL VISITORS
2016	Percent	Percent	Percent	Percent	Percent	#
Australia	15.9%	46.8%	23.4%	12.8%	1.0%	1,162
Canada	4.5%	26.7%	43.7%	22.9%	2.1%	17,206
Europe	11.1%	25.7%	31.7%	28.6%	3.0%	17,436
Latin America	31.3%	37.7%	10.7%	19.0%	1.3%	12,920
United States of America	6.8%	53.0%	28.6%	10.9%	0.7%	245,224
Other	22.8%	32.5%	14.9%	29.0%	0.7%	4,941

Airport Arrivals - Days Stayed by Origin Region


Table 2.6



	Less than 4 days	4 – 7 Days	8 – 10 Days	More than 10 days	Not Stated	TOTAL VISITORS
	Percent	Percent	Percent	Percent	Percent	#
2017*						
Australia	17.4%	46.8%	21.5%	13.6%	0.7%	553
Canada	4.0%	28.2%	44.8%	21.1%	1.9%	12,095
Europe	10.8%	22.7%	35.0%	28.5%	3.0%	8,832
Latin America	27.3%	35.6%	13.6%	21.3%	2.2%	6,063
United States of America	6.1%	52.8%	27.8%	12.5%	0.8%	132,550
Other	19.5%	33.5%	15.1%	30.6%	1.3%	2,416

Airport Arrivals - Days Stayed by Origin Region


Table 2.7



	Less than 4 days	4 – 7 Days	8 – 10 Days	More than 10 days	Not Stated	TOTAL VISITORS
	Percent	Percent	Percent	Percent	Percent	#
2015						
Business - Official	25.0%	34.2%	16.7%	23.1%	1.0%	2,405
Business - Professional	39.0%	36.6%	12.0%	11.7%	0.6%	9,833
Leisure	4.2%	50.6%	34.4%	9.8%	1.0%	196,386
Visiting Family/Friends	4.5%	42.6%	30.8%	20.7%	1.4%	23,392
Not Stated (Visitor Only)	3.2%	14.7%	9.0%	73.0%	0.1%	3,495

Airport Arrivals - Days Stayed by Purpose of Visit


Table 2.8



	Less than 4 days	4 – 7 Days	8 – 10 Days	More than 10 days	Not Stated	TOTAL VISITORS
	Percent	Percent	Percent	Percent	Percent	#
2016						
Business - Official	28.3%	28.9%	11.5%	30.7%	0.7%	2,906
Business - Professional	39.1%	36.0%	10.7%	13.6%	0.7%	11,332
Leisure	4.9%	53.3%	30.9%	10.0%	1.0%	226,512
Visiting Family/Friends	6.5%	44.6%	29.7%	17.9%	1.3%	33,021
Not Stated (Visitor Only)	35.2%	6.0%	2.9%	55.7%	0.1%	7,024

Airport Arrivals - Days Stayed by Purpose of Visit

Table 2.9



	Less than 4 days	4 – 7 Days	8 – 10 Days	More than 10 days	Not Stated	TOTAL VISITORS
	Percent	Percent	Percent	Percent	Percent	#
2017*						
Business - Official	25.4%	25.8%	20.1%	24.7%	4.0%	3,478
Business - Professional	34.0%	33.3%	14.6%	16.3%	1.8%	5,253
Leisure	5.1%	53.3%	31.3%	9.4%	0.9%	115,381
Visiting Family/Friends	6.3%	47.9%	26.7%	17.7%	1.3%	16,037
Not Stated (Visitor Only)	10.1%	17.2%	9.6%	62.7%	0.4%	5,526

Airport Arrivals - Days Stayed by Purpose of Visit

There seems to be a substantial number of Official Business visitors who engage in prolonged visits. One would expect this trend to be more pronounced in the VFR category, however this does not appear to be the case.

Visitor Expenditure, Motivation & Satisfaction Survey

(VEMS) 2017

SURVEY RESULTS

"This survey of the overnight market is conducted for one week in each month of the year, on a continuous basis"

Section III



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Results of the VEMS Survey 2017

This survey of the overnight market is conducted for one week in each month of the year. The objectives are to:

1. Better understand visitors' spending patterns.
2. Ascertain the average length of stay for tourists.
3. Get a better understanding of the reasons why people visit Belize.
4. Obtain a profile of our visitors.

The 2017 VEMS was contracted to the Statistical Institute of Belize on behalf of the Belize Tourism Board (BTB) and the Central Bank of Belize. Interviewers were stationed at the three main ports of entry: the Philip S. W. Goldson International Airport, the Santa Elena Border Station (with Mexico) and the Belize Western (Benque) Border Station (with Guatemala). Visitors through these three main ports accounted for over 97% of all overnight tourist visitor arrivals to Belize in 2017. Unless assistance was requested, the questionnaire was self-administered and returned to interviewers. Administering the survey has proved challenging, particularly at the border stations with Guatemala and Mexico. This is due to the limited time tourists have at the borders before they actually leave the country.

At the airport however, the survey was executed in the comfort of the departure lounge, where respondents generally had at least 30 minutes before their flight departed to fill out the survey. Consequently, there has been much greater success in collecting survey responses at this port. There are two different versions of the VEMS questionnaire. The first version contains more questions related to visits to attractions as well as a section on visitor satisfaction rating. The other shorter version of the VEMS questionnaire addresses issues related to expenditure and multiple entry visits. Some of the key findings from the VEMS such as the average daily expenditure and the average visitor length of stay, are used in the calculation of the total annual overnight tourist expenditure figure.

2017

Border

Frequency

Percent

Table 3.1

Philip Goldson International Airport (PGIA)	3,419	79.3
Benque Viejo Western Border (BVWB)	551	12.8
Santa Elena Northern Border (SEB)	342	7.9
Total	4,312	100.0



Surveys Completed by Border Station



Table 3.2

2017

	Philip Goldson Int'l Airport (PGIA)	Santa Elena Northern Border (SEB)	Benque Viejo Western Border (BVWB)	Total	Percent
January	294	26	66	386	9.0
February	331	32	54	417	9.7
March	352	36	34	422	9.8
April	299	33	36	368	8.5
May	320	26	30	376	8.7
June	262	17	31	310	7.2
July	256	35	41	332	7.7
August	331	34	53	418	9.7
September	218	23	39	280	6.5
October	220	18	47	285	6.6
November	283	32	60	375	8.7
December	253	30	60	343	8.0
TOTAL:	3,419	342	551	4,312	100.0

Survey Forms Completed by Month

2017

Country/Region

Frequency

Percent

Table 3.3

Country/Region	Frequency	Percent
USA	7,762	67.2
Europe	1,931	16.7
Canada	788	6.8
Central America	117	1.0
Caribbean	76	0.7
Other	872	7.6
DK/NS	0	0.0
Total	11,546	100.0

Arrivals By Country/Region of Origin



2017

US States

Frequency

Percent

TEXAS

1,200

15.46

CALIFORNIA

937

12.07

NEW YORK

413

5.32

FLORIDA

395

5.09

COLORADO

391

5.04

ILLINOIS

255

3.29

WASHINGTON

254

3.27

GEORGIA

208

2.68

MINNESOTA

187

2.41

NORTH CAROLINA

186

2.40

PENNSYLVANIA

186

2.40

OREGON

163

2.10

OHIO

157

2.02

MASSACHUSETTS

156

2.01

TENNESSEE

154

1.98

ARIZONA

153

1.97

MISSOURI

151

1.95

VIRGINIA

151

1.95

Table 3.4

Arrivals By US State of Origin

2017	US States	Frequency	Percent
	WISCONSIN	141	1.82
	MICHIGAN	130	1.67
	NEW JERSEY	126	1.62
	MARYLAND	115	1.48
	LOUISIANA	113	1.46
	INDIANA	111	1.43
	OKLAHOMA	93	1.20
	ALABAMA	88	1.13
	SOUTH CAROLINA	78	1.00
	NEBRASKA	74	0.95
	IDAHO	72	0.93
	KANSAS	70	0.90
	MISSISSIPPI	70	0.90
	CONNECTICUT	68	0.88
	UTAH	68	0.88
	NEVADA	66	0.85
	KENTUCKY	64	0.82
	ARKANSAS	60	0.77

Table 3.4

2017

US States

Frequency

Percent

MONTANA

59

0.76

IOWA

57

0.73

NEW MEXICO

44

0.57

ALASKA

39

0.50

NEW HAMPSHIRE

33

0.43

WYOMING

32

0.41

MAINE

30

0.39

DISTRICT OF
COLOMBIA

29

0.37

NORTH DAKOTA

23

0.30

RHODE ISLAND

23

0.30

VERMONT

22

0.28

DELAWARE

12

0.15

SOUTH DAKOTA

12

0.15

WEST VIRGINIA

10

0.13

HAWAII

7

0.09

NOT STATED

26

0.33

Total**7,762****100.00**

Table 3.4

2017

Country

Frequency

Percent

Table 3.5

UNITED KINGDOM	624	32.3
GERMANY	295	15.3
FRANCE	179	9.3
HOLLAND	172	8.9
SWITZERLAND	90	4.7
IRELAND	80	4.1
SPAIN	71	3.7
ITALY	65	3.4
NORWAY	20	1.0
OTHER	330	17.1
Not Stated	5	0.3
Total	1,931	100.0

2017	Province	Frequency	Percent
Table 3.6	ONTARIO	262	33.2
	ALBERTA	189	24.0
	BRITISH COLUMBIA	175	22.2
	QUEBEC	72	9.1
	MANITOBA	33	4.2
	NOVA SCOTIA	19	2.4
	SASKATCHEWAN	19	2.4
	NEWBRUNSWICK	5	0.6
	YUKON	5	0.6
	NEWFOUNDLAND and LABRADOR	4	0.5
	NORTHWEST TERRITORIES	2	0.3
	NUNAVUT	0	0.0
	PRINCE EDWARD ISLAND	0	0.0
	Not Stated	3	0.4
Total	788	100.0	



Arrivals By Canadian Province of Origin

Peak values or points that the reader should focus on will be highlighted in certain tables. It is important to recognize that the overwhelming majority of Europeans who visit Belize are leisure travelers as seen in Table 3.8, for example. In addition, most visitors from the Caribbean travel to Belize on business.

2017

Arrival Mode

Frequency

Percent

Table 3.7

Arrival Mode	Frequency	Percent
Air	3,307	77.1
Land	825	19.2
Sea	72	1.7
Other	83	1.9
Not Stated	2	0.0
Total	4,289	100.0



Mode of Arrival on Current Trip

Table 3.8

2017

	Leisure	Percent	Business	Percent	Friends	Percent	Religion	Percent	Other	Percent	Total
USA	6,564	84.6%	242	3.1%	487	6.3%	379	4.9%	88	1.1%	7,762
Canada	697	88.5%	15	1.9%	42	5.3%	22	2.8%	12	1.5%	788
Europe	1,835	95.0%	37	1.9%	36	1.9%	12	0.6%	11	0.6%	1,931
Caribbean	27	35.5%	39	51.3%	2	2.6%	6	7.9%	2	2.6%	76
Central America	77	65.8%	16	13.7%	14	12.0%	5	4.3%	5	4.3%	117
Other	775	88.9%	45	5.2%	30	3.4%	10	1.1%	12	1.4%	872

Purpose of Visit by Country/Region of Origin



2017

Summer

Winter

Average

Table 3.9

	Summer	Winter	Average
USA	6.11	6.29	6.19
Canada	6.76	6.64	6.69
Europe	4.81	4.90	4.85
Caribbean	4.83	4.62	4.77
Central America	4.12	4.09	4.11
Other	4.22	4.08	4.15
Average	5.70	5.85	5.77



Length of Stay (nights) by Country/Region of Origin

2017

Summer

Winter

Average

Table 3.10

	Summer	Winter	Average
Holiday, leisure	5.60	5.75	5.67
Business	3.99	3.84	3.94
Visit Friends	7.79	8.09	7.91
Religion	6.80	6.97	6.87
Other	4.98	5.04	5.00
DK/NS	6.00	6.00	6.00
Average	5.70	5.85	5.77



Length of Stay (nights) by Purpose of Visit

Table 3.11

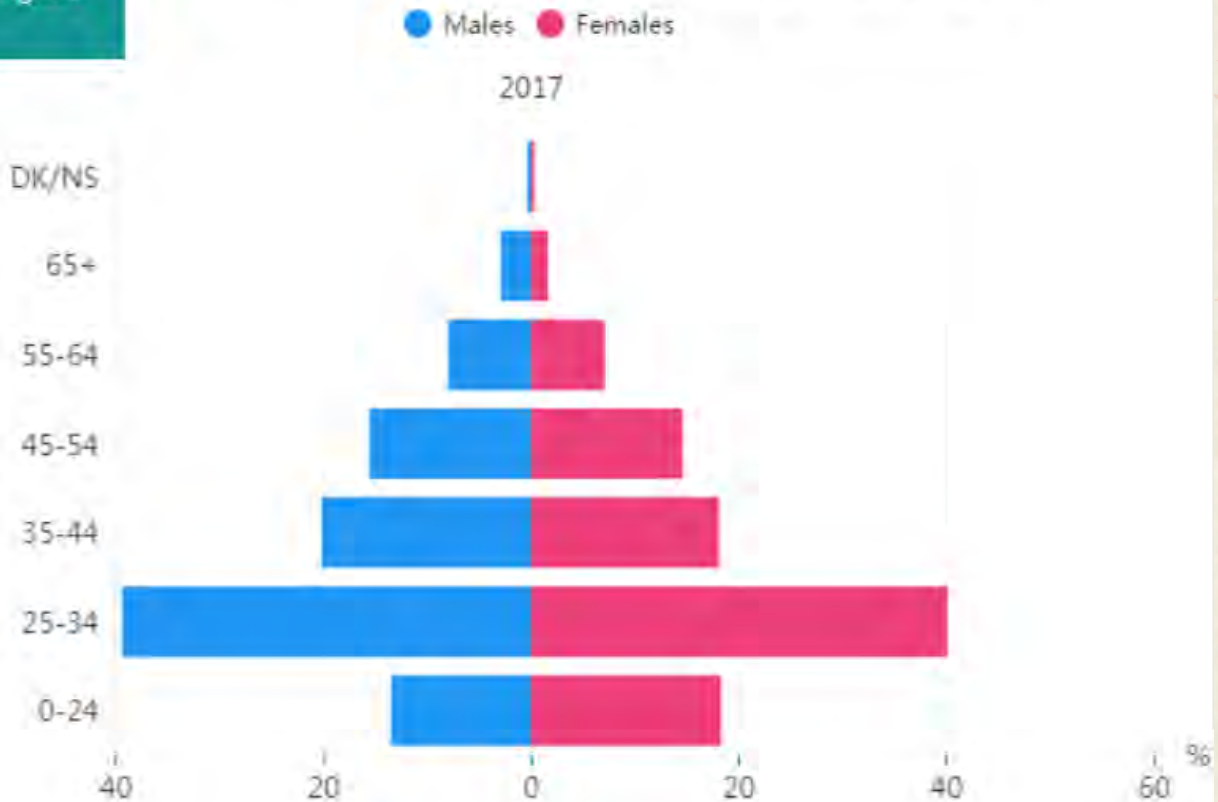
	2017					Percent Total	
	Male	Percent	Female	Percent	DK/NS	Total	Total
LESS THAN 25	210	13.5%	497	18.3%	2	709	16.5%
25-34	614	39.4%	1090	40.1%	4	1708	39.8%
35-44	315	20.2%	492	18.1%	3	810	18.9%
45-54	243	15.6%	396	14.6%	3	642	15.0%
55-64	124	8.0%	192	7.1%	0	316	7.4%
65 AND OVER	45	2.9%	43	1.6%	2	90	2.1%
DK/NS	7	0.4%	7	0.3%	0	14	0.3%



Arrivals by Sex & Age Group

Visitor Arrivals by Sex & Age Group

Fig 3.1



2017

	Nobody	Spouse	Family	Group/ Friends	Other	Percent Total
USA	9.8%	38.3%	22.7%	27.8%	1.3%	100.0%
Canada	18.7%	35.5%	15.4%	29.8%	0.7%	100.0%
Europe	19.6%	32.0%	10.5%	36.9%	1.0%	100.0%
Caribbean	36.4%	9.1%	0.0%	54.5%	0.0%	100.0%
Central America	21.9%	12.5%	21.9%	43.8%	0.0%	100.0%
Other	23.2%	32.2%	8.9%	33.4%	2.2%	100.0%
Percent Average	13.2%	36.3%	19.1%	30.1%	1.3%	100.0%

Travel Companions by Country/Region of Origin



Table 3.13

2017

	USA	CANADA	EUROPE	CARIBBEAN	CENTRAL AMERICA	OTHER	TOTAL
Hotel/Resort	75.5%	65.2%	57.4%	90.9%	59.4%	63.7%	70.8%
Guest-House	14.2%	33.8%	37.4%	18.2%	9.4%	27.7%	20.4%
Own Vacation house	1.5%	2.7%	0.3%	0.0%	0.0%	0.3%	1.3%
Rented house/apart	13.3%	10.4%	5.8%	0.0%	9.4%	2.2%	10.9%
Friend/Relative	4.8%	8.4%	2.4%	0.0%	28.1%	5.1%	4.8%
Fishing Lodge	1.2%	1.0%	0.4%	9.1%	0.0%	0.6%	1.0%
Boat	1.8%	1.0%	1.8%	0.0%	0.0%	0.3%	1.6%
Camping	1.3%	3.3%	4.2%	0.0%	0.0%	3.2%	2.0%
Time-share unit	0.3%	0.3%	0.1%	0.0%	0.0%	0.0%	0.2%
Other	3.4%	10.0%	13.3%	9.1%	3.1%	10.2%	6.0%
DK/NS	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%

Accommodation Type by Country/Region of Origin

2017

	USA	CANADA	EUROPE	CARIBBEAN	CENTRAL AMERICA	OTHER	TOTAL
Belmopan	3.9%	6.0%	6.7%	0.0%	15.6%	4.1%	4.6%
Belize District	15.3%	22.1%	20.5%	54.5%	12.5%	20.7%	17.1%
Corozal	3.0%	6.0%	4.8%	0.0%	9.4%	5.7%	3.8%
Orange Walk	3.9%	6.7%	8.3%	0.0%	9.4%	3.8%	4.8%
San Ignacio/Cayo	22.7%	34.4%	41.1%	0.0%	31.3%	29.3%	27.1%
Dangriga/Stann Creek	14.5%	18.4%	12.3%	0.0%	0.0%	7.0%	13.7%
Punta Gorda/Toledo	2.4%	2.3%	4.2%	0.0%	3.1%	1.6%	2.6%
Ambergris Caye	49.6%	35.5%	21.9%	27.3%	31.3%	19.1%	41.6%
Caye Caulker	22.2%	46.5%	70.4%	0.0%	31.3%	61.5%	34.8%
Other Islands	6.9%	7.7%	4.9%	0.0%	0.0%	4.1%	6.4%
Placencia	14.1%	19.1%	10.4%	18.2%	6.3%	8.6%	13.4%
Other	0.4%	0.7%	0.3%	0.0%	0.0%	0.0%	0.4%
DK/NS	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%

Destination/Area Stayed by Country/Region of Origin

The vast majority of Europeans prefer to visit Caye Caulker as opposed to any other destination. The same applies to Australians who make up most of the respondents who fall under the "Other" category.

Table 3.15

2017	Travel Agent Magazine		Travel Guide book	Television	Friends Internet	DK/NS	Other	Total	
	USA	6.7%	0.8%	2.1%	1.1%	43.3%	36.9%	0.2%	8.9%
Canada	5.7%	1.0%	5.7%	1.0%	44.1%	34.8%	0.0%	7.7%	100.0%
Europe	11.6%	1.3%	13.3%	1.3%	34.6%	32.8%	0.1%	4.9%	100.0%
Caribbean	9.1%	0.0%	0.0%	0.0%	27.3%	18.2%	0.0%	45.5%	100.0%
Central America	15.6%	0.0%	3.1%	0.0%	46.9%	31.3%	0.0%	3.1%	100.0%
Other	11.1%	1.6%	6.7%	0.3%	42.7%	30.6%	0.0%	7.0%	100.0%
Percent Average	7.8%	0.9%	4.5%	1.0%	41.9%	35.5%	0.2%	8.1%	2.6%



Sources of Information about Belize

The information in Table 3.8 illustrates that over 50% of visitors from the Caribbean region, travel to Belize on business. It is likely that most Caribbean visitors find out about Belize through their employer, co-worker or place of work. Most Europeans and Australians (Other) were visiting Belize for the first time. This makes sense considering the vast distances these particular visitors have to travel to get to the country in the first place.



Table 3.16

2017	USA	CANADA	EUROPE	CARIBBEAN	CENTRAL AMERICA	OTHER	Percent Total
	FIRST VISIT?						
YES	77.8%	76.9%	94.0%	72.7%	43.8%	88.5%	80.9%
NO	22.2%	23.1%	6.0%	27.3%	56.3%	11.5%	19.1%

First Visit to Belize by Country/Region of Origin

2017

	Air	Land	Cruise ship	DK/NS	Other	Total
USA	93.7%	5.5%	0.5%	0.0%	0.3%	100.0%
Canada	79.7%	20.3%	0.0%	0.0%	0.0%	100.0%
Europe	62.8%	27.9%	4.7%	0.0%	4.7%	100.0%
Caribbean	100.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Central America	22.2%	77.8%	0.0%	0.0%	0.0%	100.0%
Other	19.4%	75.0%	2.8%	0.0%	2.8%	100.0%
Percent Average	86.1%	12.6%	0.7%	0.0%	0.6%	100.0%

Mode of Arrival for Repeat Visitors



2017



NO

YES

TOTAL

Table 3.18

	NO	YES	TOTAL
USA	91.1%	8.9%	100.0%
Canada	85.9%	14.1%	100.0%
Europe	76.5%	23.5%	100.0%
Caribbean	89.5%	10.5%	100.0%
Central America	88.0%	12.0%	100.0%
Other	81.5%	18.5%	100.0%
Total	87.5%	12.5%	100.0%

Multiple Destinations Visited by Country/Region of Origin

A significant proportion of Europeans and Australians (Other) who come to Belize, visit other destinations while they are here. These types of travelers are usually referred to as "backpackers". They tend to be more nomadic than travelers from other regions, and are more likely to stay in modest accommodations while visiting the country.

2017	USA	CANADA	EUROPE	CARIBBEAN	CENTRAL AMERICA	OTHER	TOTAL
Diving	17.6%	25.1%	18.4%	18.2%	6.3%	23.6%	18.6%
Snorkeling	72.1%	65.6%	76.0%	27.3%	37.5%	61.1%	71.1%
Island Tour	25.8%	29.8%	25.9%	63.6%	34.4%	25.2%	26.2%
Caving	33.0%	34.8%	25.7%	27.3%	12.5%	15.6%	30.5%
Birding	8.3%	8.7%	9.1%	18.2%	3.1%	3.2%	8.1%
Gaming	1.2%	0.7%	0.4%	0.0%	3.1%	1.0%	1.0%
Other	11.4%	10.7%	6.3%	27.3%	15.6%	6.4%	10.2%
Fishing	23.1%	14.4%	8.1%	9.1%	6.3%	8.0%	18.7%
Sailing	12.3%	10.0%	10.2%	18.2%	0.0%	9.6%	11.5%
Canoe/Kayaking	26.1%	22.7%	19.5%	27.3%	9.4%	11.5%	23.6%
Jungle trekking	31.5%	32.1%	24.4%	27.3%	9.4%	14.3%	29.0%
Cultural Event	15.0%	16.4%	13.7%	27.3%	15.6%	7.0%	14.4%
None	7.1%	9.7%	6.9%	9.1%	18.8%	18.5%	8.2%
DK/NS	0.2%	1.7%	2.1%	0.0%	6.3%	1.9%	0.8%

Participation in Activities by Country/Region of Origin



Table 3.20

2017

	USA	CANADA	EUROPE	CARIBBEAN	CENTRAL AMERICA	OTHER	TOTAL
Offshore Islands	44.7%	49.2%	29.9%	54.5%	21.9%	35.4%	41.7%
Barrier Reef	57.8%	53.5%	62.4%	18.2%	21.9%	45.9%	57.0%
Blue Hole	8.1%	12.4%	12.5%	0.0%	9.4%	14.0%	9.5%
Archaeological sites	40.4%	42.1%	37.7%	36.4%	21.9%	23.2%	38.7%
Other	3.5%	3.7%	2.9%	9.1%	6.3%	1.9%	3.3%
Marine protected Areas	46.4%	46.8%	47.3%	36.4%	31.3%	38.5%	45.9%
National Park/Reserve	44.5%	44.5%	30.4%	36.4%	15.6%	22.3%	40.3%
Museum/Historical site	20.5%	20.4%	15.8%	18.2%	6.3%	9.6%	18.8%
None	10.5%	13.0%	9.3%	9.1%	28.1%	21.7%	11.4%
DK/NS	0.4%	1.3%	3.2%	0.0%	6.3%	2.9%	1.1%

Places of Interest Visited by Country/Region of Origin

Table 3.21

2017

	NONPREPAID		PREPAID		TOTAL	
	Number	Percent	Number	Percent	Number	Percent
USA	6353	81.8%	1409	18.2%	7762	100.0%
Canada	676	85.8%	112	14.2%	788	100.0%
Europe	1637	84.8%	294	15.2%	1931	100.0%
Caribbean	71	93.4%	5	6.6%	76	100.0%
Central America	101	86.3%	16	13.7%	117	100.0%
Other	765	87.7%	107	12.3%	872	100.0%

Pre-paid packages by Country/Region of Origin

2017

TOTAL PACKAGE COST

Transportation

Insurance

Other

Table 3.22

100%

41.4%

1.8%

56.8%



Pre-paid Package Costs by Components (%)

2017



Summer

Winter

Average

Table 3.23

USA

2,710.23

2,942.42

2,805.51

CANADA

2,730.80

3,506.04

3,302.03

EUROPE

3,512.10

2,844.47

3,259.27

CARIBBEAN

1,914.33

1,914.33

CENTRAL AMERICA

979.00

974.13

975.75

DK/NS

3,558.06

2,816.31

3,150.62

AVERAGE

2,829.04

2,961.27

2,886.54

Pre-paid Package costs by Country/Region of Origin (\$US)

2017



Summer

Winter

Average

Table 3.24

Visit
Neighboring
Country

Didn't Visit
Neighboring
Country

3,216.34

3,193.72

3,204.47

2,780.56

2,917.12

2,838.07

AVERAGE

2,829.04

2,961.27

2,886.54

Visiting Neighboring Country – Pre-paid package costs (\$US)

2017



Summer

Winter

Average

Table 3.25

USA

169.46

170.50

169.92

CANADA

123.72

133.50

129.46

EUROPE

94.05

91.62

93.05

CARIBBEAN

201.51

132.45

182.81

CENTRAL
AMERICA

121.25

114.42

117.98

OTHER

99.15

109.60

104.11

AVERAGE

147.41

148.73

148.00

Average Daily Expenditure by Country/Region of Origin (\$US)

2017



Summer

Winter

Average

Table 3.26

	Summer	Winter	Average
Holiday, leisure	148.52	151.73	149.99
Business	204.41	200.33	203.08
Visit Friends	89.48	94.69	91.59
Religion	151.55	123.67	140.21
Other	125.00	166.67	145.83
DK/NS	166.65	80.31	137.87
AVERAGE	147.41	148.73	148.00

Average Daily Expenditure by Purpose of Visit (\$US)



Table 3.27

2017

	Holiday /Leisure	Business	Visit Friends	Religion	DK/NS	Other	Total
USA	175.26	211.85	100.35	143.74	145.83	161.66	169.92
CANADA	133.47	144.08	63.95	140.95	-	139.15	129.46
EUROPE	92.69	172.92	66.82	96.43	-	84.64	93.05
CARIBBEAN	245.15	175.32	208.33	126.48	-	76.67	182.81
CENTRAL AMERICA	121.48	194.34	27.39	38.68	-	52.22	117.98
Other	101.29	223.94	45.58	69.17	-	87.64	104.11
TOTAL	149.99	203.08	91.59	140.21	145.83	137.87	148.00

Daily Expenditure by Country/Region of Origin & Purpose of Visit (\$US)

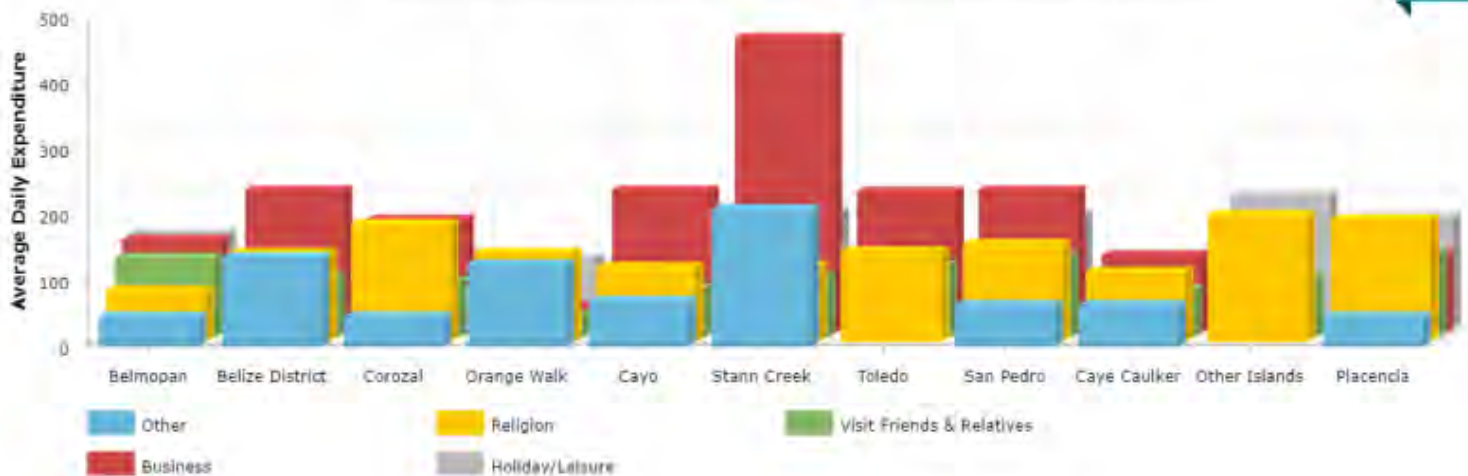
2017

	Holiday/ Leisure		Business		Visit Friends		Religion		DK/NS		Other		Average	
	\$	# of Cases	\$	# of Cases	\$	# of Cases	\$	# of Cases	\$	# of Cases	\$	# of Cases	\$	# of Cases
Belmopan	145.06	99	141.07	4	122.34	7	78.11	11		0	44.44	1	136.77	122
Belize District	138.46	364	217.78	15	93.86	24	134.51	18		0	134.70	4	138.54	425
Corozal	116.00	68	171.67	4	83.33	5	179.79	9		0	44.44	1	122.46	87
Orange Walk	108.03	53	40.00	1	33.67	7	134.49	10		0	125	1	103.76	72
San Ignacio/Cayo	125.54	565	217.26	4	75.44	24	112.31	21		0	68.84	2	123.55	616
Dangriga/SC	178.52	266	450.00	2	93.50	12	114.61	8		0	208.42	1	175.21	289
Toledo/PG	125.83	25	215.24	3	110.29	11	136.98	11		0		0	130.23	50
Ambergris Caye	175.11	1114	216.85	6	120.73	22	149.19	10	166.67	1	61.06	2	173.86	1155
Caye Caulker	112.84	973	116.67	2	72.24	20	106.86	21		0	61.25	2	111.82	1018
Other Islands	203.90	131		0	93.86	4	191.48	3		0		0	200.44	138
Placencia	170.26	273	120.18	4	125.40	12	184.77	16		0	44.44	1	168.19	306

Daily Expenditure (\$US) by Purpose of Visit by Places Stayed

Daily Expenditure (\$US) by Purpose of Visit by Places Stayed

Fig 3.2

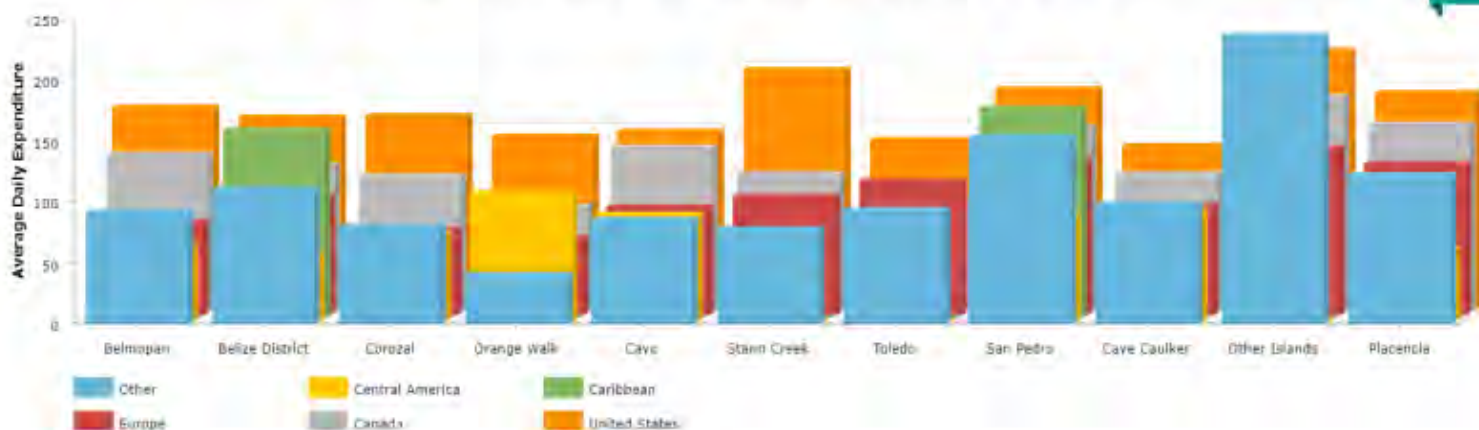


2017

	USA		Canada		Europe		Caribbean		Central America		Other		Average	
	\$	# of Cases	\$	# of Cases	\$	# of Cases	\$	# of Cases	\$	# of Cases	\$	# of Cases	\$	# of Cases
Belmopan	165.60	77	129.15	8	76.50	22	-	0	60.14	5	91.74	10	136.77	122
Belize District	157.41	271	119.89	25	97.51	85	154.01	6	53.70	3	109.95	35	138.54	425
Corozal	158.97	45	111.40	11	69.59	17	-	0	72.22	2	78.95	12	122.46	87
Orange Walk	141.81	35	86.48	8	63.08	20	-	0	105.35	3	39.72	6	103.76	72
San Ignacio/Cayo	145.92	348	134.68	41	87.98	159	-	0	87.19	8	85.32	60	123.55	616
Dangriga/SC	196.49	225	113.46	19	97.57	39	-	0	-	0	77.16	6	175.21	289
Toledo/PG	139.39	36	90.91	1	110.62	11	-	0	-	0	92.86	2	130.23	50
Ambergris Caye	180.34	972	151.34	57	128.04	81	171.43	2	85.23	6	153.00	37	173.86	1155
Caye Caulker	134.13	442	112.66	71	89.38	347	-	0	90.60	7	98.70	151	111.82	1018
Other Islands	212.57	107	176.57	7	136.82	20	-	0	-	0	235.83	4	200.44	138
Placencia	177.63	241	154.17	25	123.74	26	-	0	59.72	2	122.25	12	168.19	306

Daily Expenditure (\$US) by Origin Country/Region by Places Stayed

Daily Expenditure (\$US) by Country/Region of Origin by Places Stayed



2017

	Good	Average	Poor
INTL. AIRLINE CONNECTION	77.43%	20.19%	2.38%
IMMIGRATION SERVICES	76.00%	21.14%	2.86%
CUSTOMS SERVICES	76.41%	21.39%	2.20%
PERSONAL SAFETY	76.18%	22.33%	1.49%
ACCOMODATION	78.69%	19.71%	1.60%
RESTAURANTS	74.65%	23.18%	2.16%
ENTERTAINMENT	69.79%	26.99%	3.21%
TOURS	88.09%	11.27%	0.65%
DOMESTIC TRANSPORTATION	63.61%	30.47%	5.92%
VALUE FOR MONEY	63.57%	31.06%	5.37%
NATIONAL PARKS	91.79%	7.89%	0.32%
MARINE ATTRACTIONS	94.51%	5.34%	0.15%
ARCHAEOLOGICAL SITES	93.29%	6.35%	0.36%

Satisfaction Rating of Aspects of Trip

Domestic Transportation and "Value for money" are two aspects of Belize's tourism product offering that require improvement, according to visitors.

2017



Yes

No

Maybe

Table 3.31

	Yes	No	Maybe
Return	83.60%	3.29%	13.11%
Recommend	92.42%	1.04%	6.55%

Satisfaction Rating – Return / Recommend Belize

Table 3.32

2017

	CALIFORNIA	COLORADO	FLORIDA	GEORGIA	ILLINOIS	MINNESOTA	NEW YORK	PENNSYLVANIA	TEXAS	WASHINGTON	TOTAL
Diving	21.7%	23.3%	15.5%	9.5%	20.7%	13.3%	16.8%	13.8%	16.5%	15.0%	17.7%
Snorkeling	71.9%	77.4%	60.3%	64.9%	68.5%	68.9%	70.6%	73.8%	70.7%	74.0%	72.0%
Island Tour	23.8%	23.9%	25.0%	32.4%	25.0%	20.0%	28.0%	18.5%	26.6%	28.0%	25.7%
Caving	39.4%	27.0%	33.6%	21.6%	27.2%	27.8%	42.0%	35.4%	27.6%	40.0%	32.9%
Birding	9.0%	10.1%	3.4%	2.7%	8.7%	7.8%	17.5%	6.2%	5.3%	10.0%	8.3%
Gaming	1.4%	0.0%	1.7%	4.1%	1.1%	1.1%	0.0%	1.5%	2.8%	0.0%	1.2%
Other	13.0%	8.8%	17.2%	6.8%	10.9%	7.8%	14.7%	18.5%	11.3%	9.0%	11.3%
Fishing	18.3%	23.3%	25.9%	21.6%	12.0%	31.1%	12.6%	21.5%	29.3%	25.0%	23.2%
Sailing	12.2%	11.9%	11.2%	18.9%	10.9%	11.1%	13.3%	13.8%	12.3%	12.0%	12.2%
Canoe/Kayaking	26.4%	25.8%	22.4%	27.0%	27.2%	16.7%	29.4%	26.2%	26.6%	34.0%	26.2%
Jungle trekking	38.6%	30.2%	30.2%	29.7%	32.6%	31.1%	37.1%	24.6%	23.1%	39.0%	31.4%
Cultural Event	16.8%	15.7%	9.5%	13.5%	15.2%	17.8%	21.7%	7.7%	12.0%	19.0%	15.0%
None	7.8%	3.8%	12.9%	12.2%	6.5%	7.8%	5.6%	6.2%	7.0%	4.0%	7.1%
DK/NS	0.6%	0.0%	0.0%	1.4%	1.1%	0.0%	0.0%	1.5%	0.3%	0.0%	0.2%

Participation in Activities by Top 10 US State

REPORTS ON BELIZE'S

★ CRUISE ★

SECTOR

2011-2017

Section IV



BELIZE TOURISM BOARD

Cruise Passenger Arrivals to Belize

Belize is a popular destination for many cruise passengers, particularly those on the Florida-Caribbean excursion itinerary. Belize offers a variety of adventure-type activities for cruise passengers to engage in for a few hours, before they return to the vessel. The cave tubing adventure tours and the Maya temple site visits are especially popular among cruise travelers.

The main hub for cruise passengers visiting Belize is the Fort Street Tourism Village in downtown Belize City. This is a centralized area where the cruise passengers disembark from the cruise tenders and catch a bus or taxi to go on a pre-booked tour. Some guests choose to venture out on foot and catch a tour on their own, or they may choose to simply explore the city. Within the Fort George Tourism Zone, there are shopping centers, restaurants and sometimes live entertainment.

In October 2016, another facility opened up to welcome cruise passengers to Belize. This area is located at Harvest Caye, a small island in the southern region of offshore Belize. This cruise port terminal is owned by Norwegian Cruise Line and welcomed over 267,000 cruise passengers to Belize in 2017. In each of the past two years, cruise passenger arrivals to Belize has exceeded one million visitors. The number of passengers arriving in both Belize City and Harvest Caye combined, make up this total.

The background of the page features a stylized map of Belize with various regions labeled: NORTHERN, NORTH ISLANDS, REEF, CENTRAL COAST, WESTERN, SOUTHEAST COAST, and SOUTHERN. The word "belize" is written in a colorful, lowercase font at the bottom. The map also includes illustrations of a lighthouse, a bird, and a fish.

belize



Table 4.1

	2011	2012	2013	2014	2015	2016	2017	% Change
JANUARY	63,835	86,128	102,871	109,251	127,376	102,337	127,061	24.2
FEBRUARY	56,864	70,711	78,766	97,740	95,067	98,623	120,996	22.7
MARCH	101,728	81,315	82,416	115,227	133,482	135,283	117,578	-13.1
APRIL	69,516	57,158	62,643	104,188	91,325	90,657	97,422	7.5
MAY	46,182	42,215	33,988	46,842	43,847	61,977	61,152	-1.3
JUNE	53,163	30,798	24,432	53,789	50,790	65,399	47,007	-28.1
JULY	32,132	35,224	32,874	67,986	54,471	51,968	44,392	-14.6
AUGUST	42,495	27,894	36,309	52,037	50,656	39,189	52,534	34.1
SEPTEMBER	33,221	23,877	25,056	47,625	45,265	54,569	57,718	5.8
OCTOBER	39,959	33,388	42,181	57,913	40,985	56,697	76,403	34.8
NOVEMBER	92,416	69,674	63,583	74,247	81,113	106,144	100,797	-5.0
DECEMBER	96,367	82,352	92,231	141,286	143,598	142,551	111,171	-21.0
	727,878	640,734	677,350	968,131	957,975	1,005,394	1,014,231	0.9

CRUISE VISITOR ARRIVALS BY MONTH



Table 4.2

	2011	2012	2013	2014	2015	2016	2017	% Change
1 st Quarter	222,427	238,154	264,053	322,218	355,925	336,243	365,635	8.7
2 nd Quarter	168,861	130,171	121,063	204,819	185,962	218,033	205,581	-5.7
3 rd Quarter	107,848	86,995	94,239	167,648	150,392	145,726	154,644	6.1
4 th Quarter	228,742	185,414	197,995	273,446	265,696	305,392	288,371	-5.6
	727,878	640,734	677,350	968,131	957,975	1,005,394	1,014,231	0.9

CRUISE VISITOR ARRIVALS BY QUARTER

Fig 4.1

Cruise Arrivals By Month

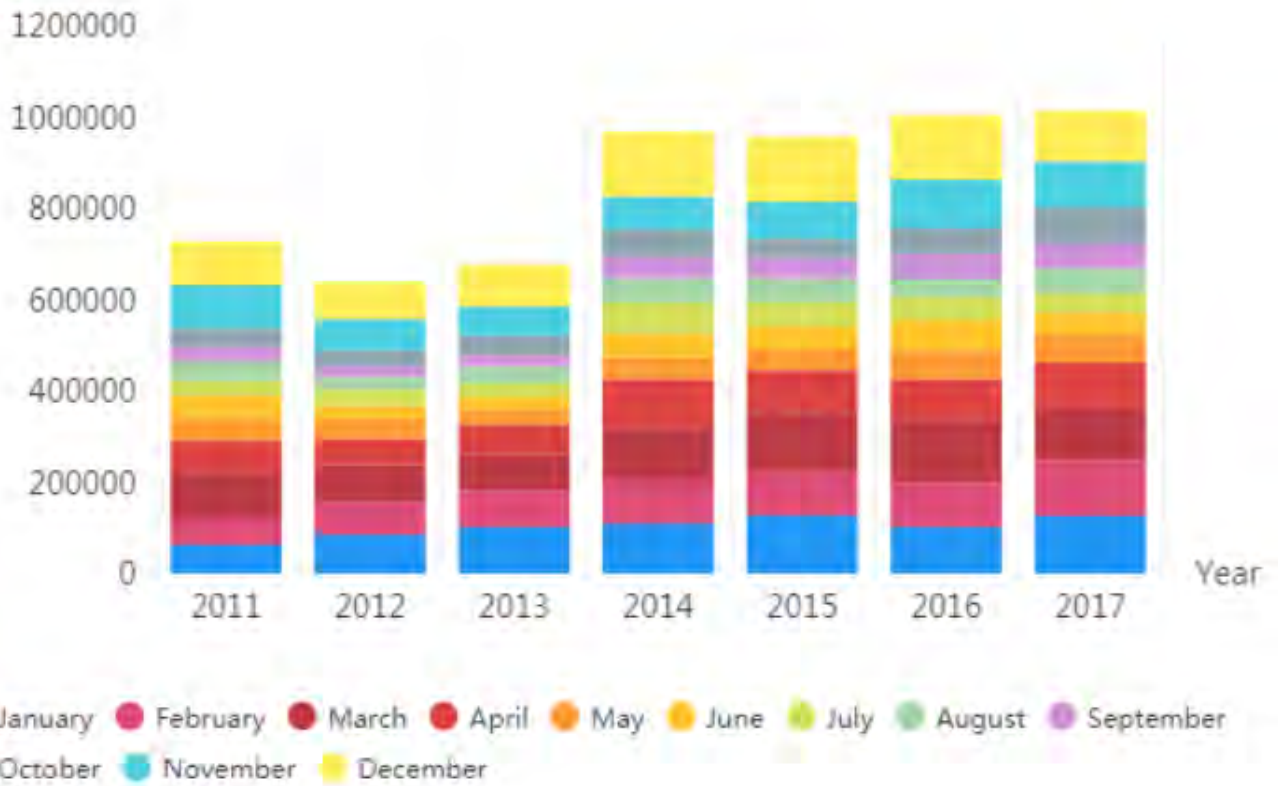


Fig 4.2

Cruise Arrivals By Quarter

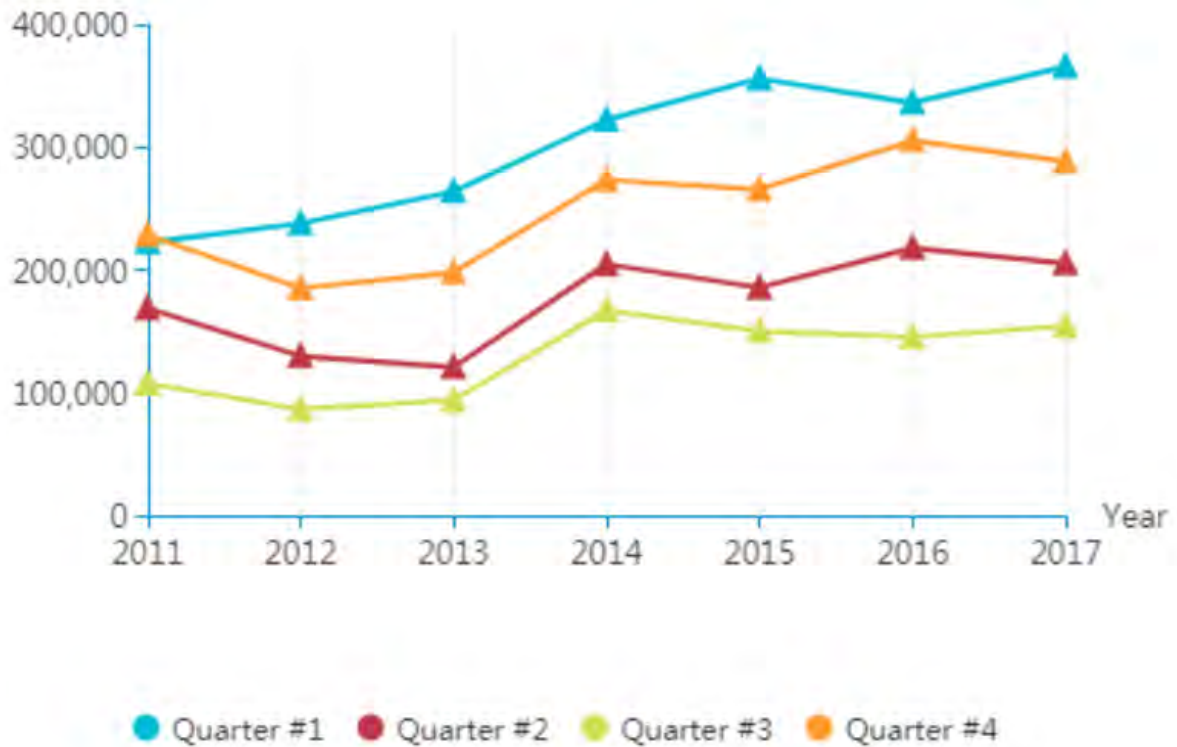


Table 4.3

	2011	2012	2013	2014	2015	2016	2017	% Change
"Winter"	291,943	295,312	326,696	426,406	447,250	426,900	463,057	8.7
Summer	435,935	345,422	350,654	541,725	510,725	578,494	551,174	-4.7
	727,878	640,734	677,350	968,131	957,975	1,005,394	1,014,231	0.9

CRUISE VISITOR ARRIVALS BY SEASON

The high season for cruise corresponds heavily with the high season for the overnight sector. The cruise high season usually lasts through the first four months of the year, then begins again in early November.

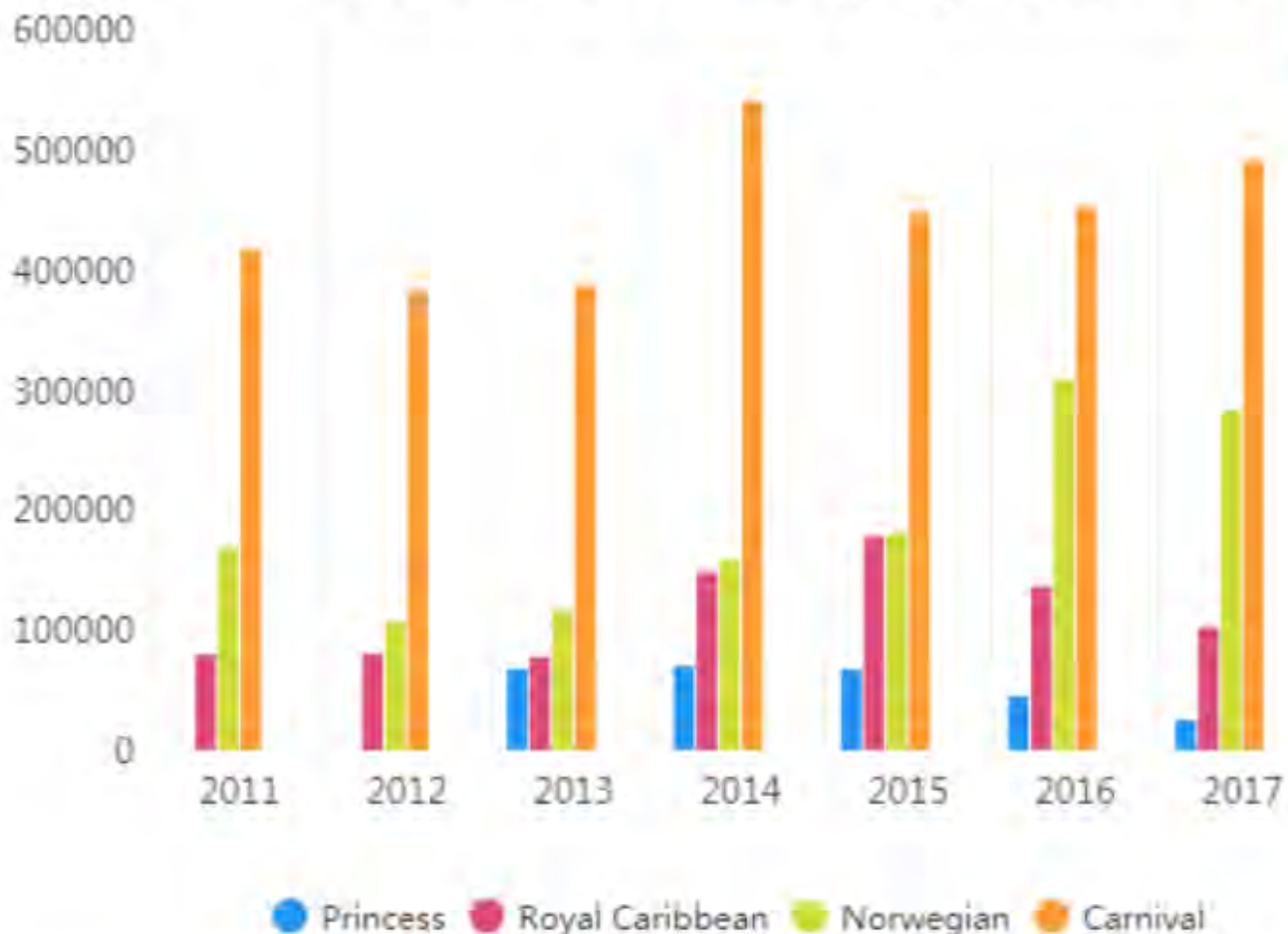


	2011	2012	2013	2014	2015	2016	2017	% Change
Carnival	416,788	382,218	386,385	539,960	448,046	452,214	490,521	8.5
Norwegian	168,099	106,467	116,131	158,175	180,594	308,409	282,626	-8.4
Royal Caribbean	79,551	79,860	77,527	148,281	177,409	135,794	102,039	-24.9
Princess			67,284	70,048	66,825	44,877	24,664	-45.0
	664,438	568,545	647,327	916,464	872,874	941,294	899,850	-4.4

CRUISE VISITOR ARRIVALS BY MAJOR CRUISE LINE

Cruise Visitor Arrivals By Major Cruise Line

Fig 4.3



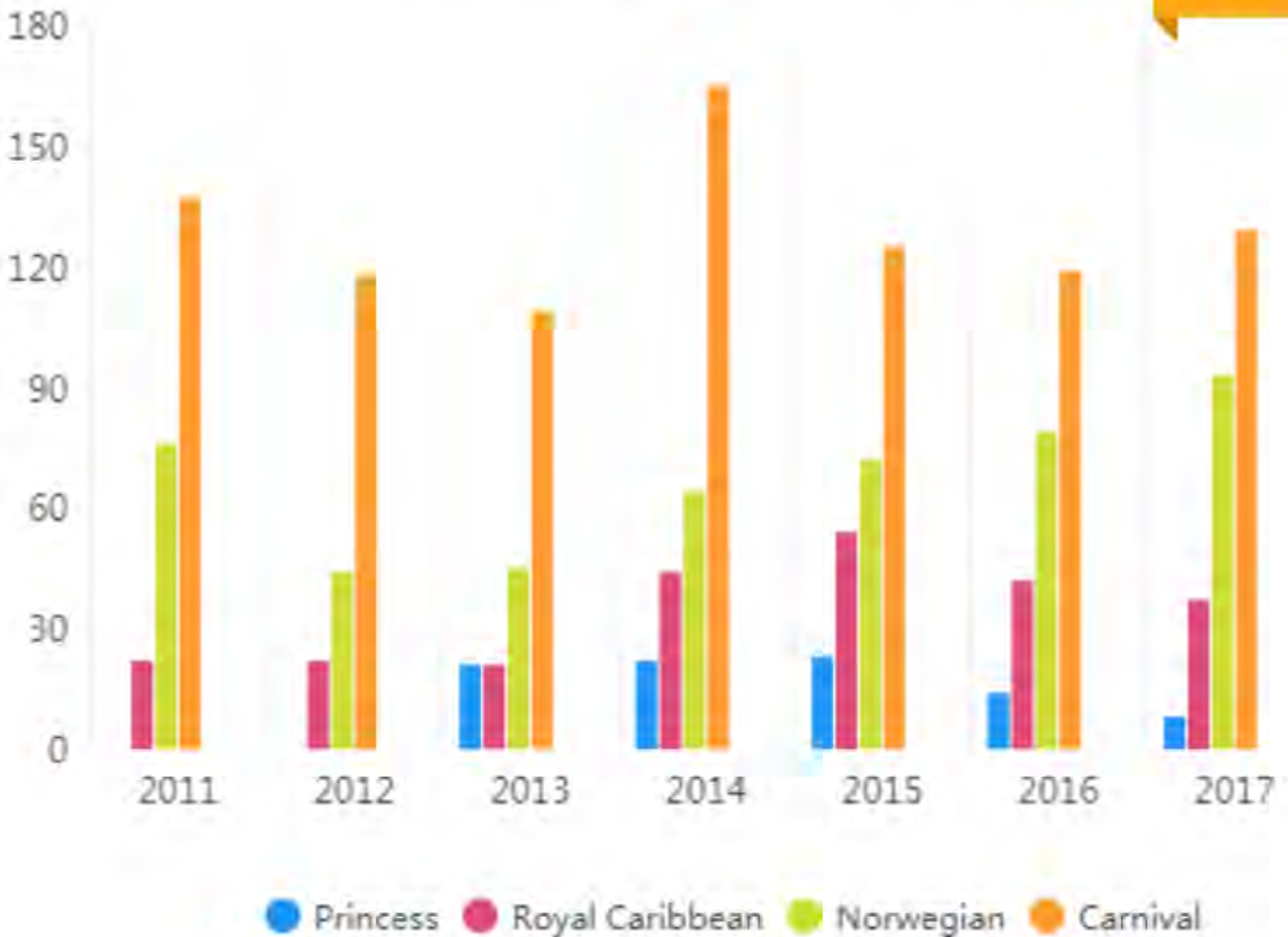


	2011	2012	2013	2014	2015	2016	2017	Change
Carnival	137	118	109	165	125	119	129	10
Norwegian	76	44	45	64	72	79	93	14
Royal Caribbean	22	22	21	44	54	42	37	-5
Princess			21	22	23	14	8	-6
	235	184	196	295	274	254	267	13

CRUISE CALLS BY MAJOR CRUISE LINE

Cruise Calls By Major Cruise Line

Fig 4.4



The numbers seen in the table below refer only to cruise passengers arriving in Belize City. It does not include cruise passengers visiting Harvest Caye. The number of persons counted as being "On Tour", were those counted as having booked a tour within the Fort George Tourism Zone. The numbers do not include those persons who may have booked a tour independently outside of the Fort George Tourism Zone.



Table 4.6

	Arrived	On Shore	On Tour
JANUARY	91,868	53,957	52,004
FEBRUARY	94,936	79,216	52,719
MARCH	80,888	68,983	51,548
APRIL	63,892	54,203	37,248
MAY	51,121	43,003	29,852
JUNE	36,696	34,546	24,177
JULY	34,051	28,972	21,412
AUGUST	47,361	40,926	30,058
SEPTEMBER	43,538	35,784	19,363
OCTOBER	49,846	40,863	23,727
NOVEMBER	72,095	59,588	39,721
DECEMBER	80,865	68,131	50,959
	747,157	608,172	432,788

CRUISE VISITORS ARRIVED, ON SHORE & ON TOUR 2017

Fig 4.5

Cruise Visitors Arrived, On Shore, On Tour 2017

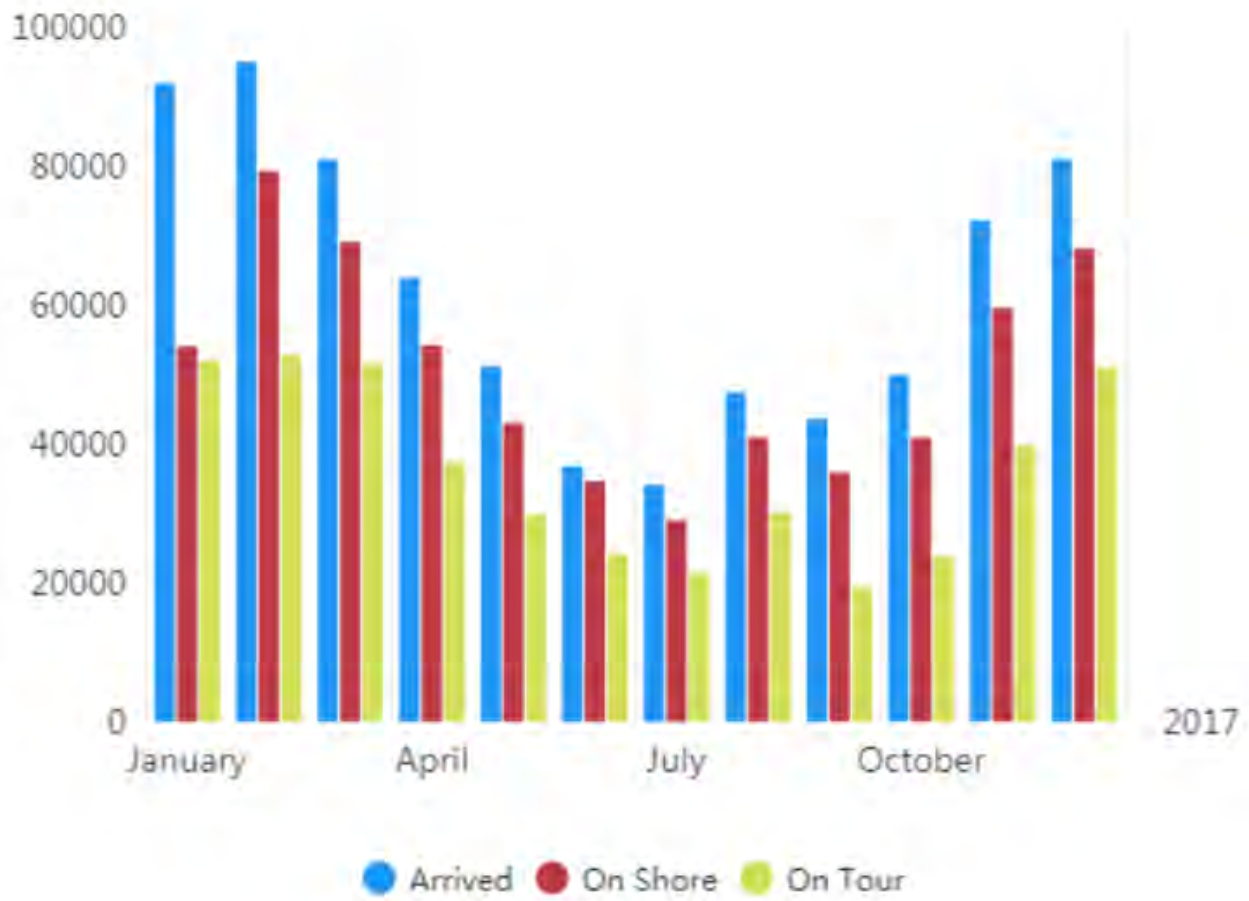




Table 4.7

2017

Jaguar Paw	100,005
Belize City	70,765
Lamanai	39,793
Altun Ha	33,591
Starfish Island	25,546
Old Belize	18,515
Goff's Caye	16,664
Belize Old River	15,830
Xunantunich	15,679
Shark Ray Alley	12,290
	348,678

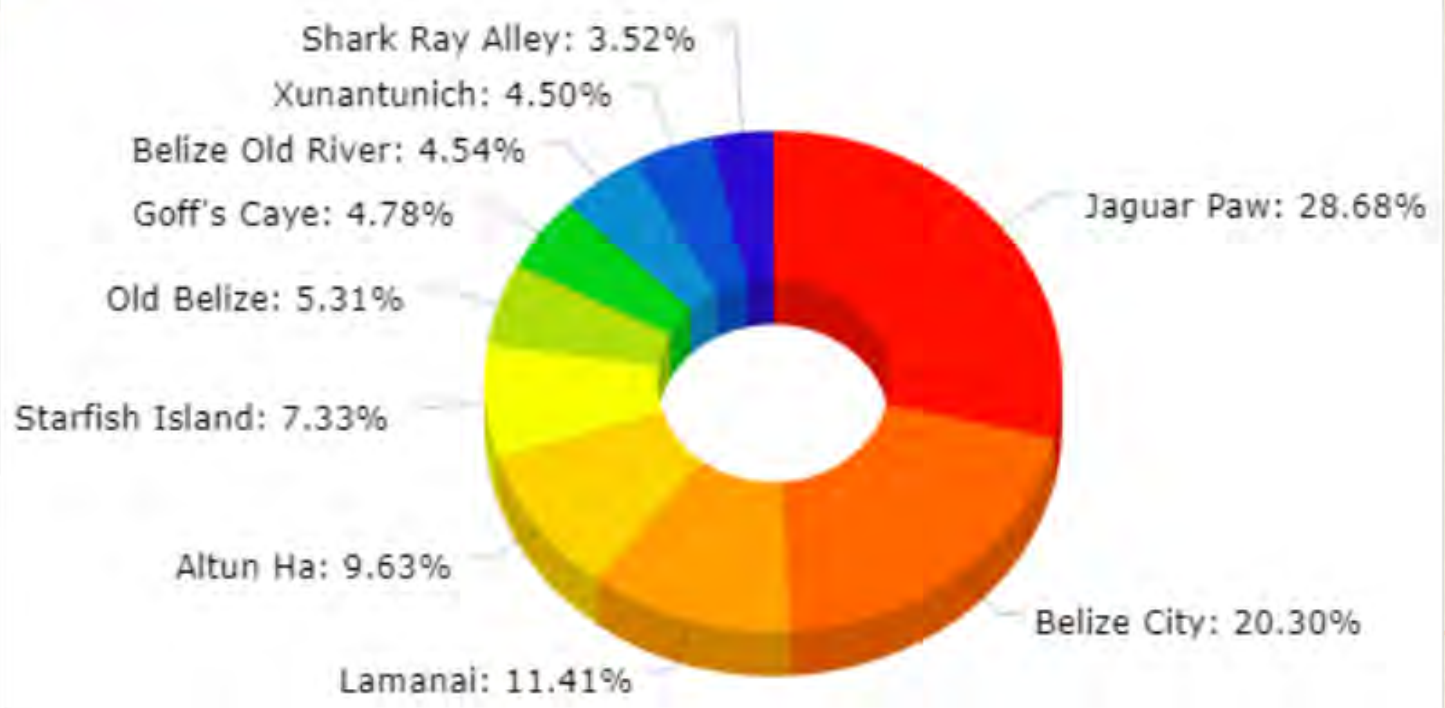
TOP 10 SITES VISITED BY CRUISE VISITORS

These site visit numbers reflect only those persons traveling exclusively to one particular site. There are multiple tours in which persons visit more than one site on a single trip. However, that information has not been included here.



Fig 4.6

Top 10 Sites Visited By Cruise Visitors 2017



2017

Jaguar Paw	100,005
Belize City	70,765
Lamanai	39,793
Altun Ha	33,591
Starfish Island	25,546
Altun Ha, Belize City	19,515
Old Belize	18,515
Altun Ha, Belize Old River	17,257
Goff's Caye	16,664
Belize Old River	15,830
Xunantunich	15,679
Shark Ray Alley	12,290
Bacab Eco Park	11,705
Belize Zoo	66,50
Baboon Sanctuary	5,157
Caye Caulker	4,217
Belize City, Altun Ha	2,199
Shark Ray Alley, San Pedro	1,542
Hol Chan	1,481
Cahal Pech	1,458
Caye Caulker, Shark Ray Alley	1,403
Belize City, Rum Factory	1,351
Belize City, Back-A-Bush	1,275
Belize City, Burrell Boom	1,274
Rum Factory	1,047
	426,209

Top 25 Tours Done by Cruise Visitors



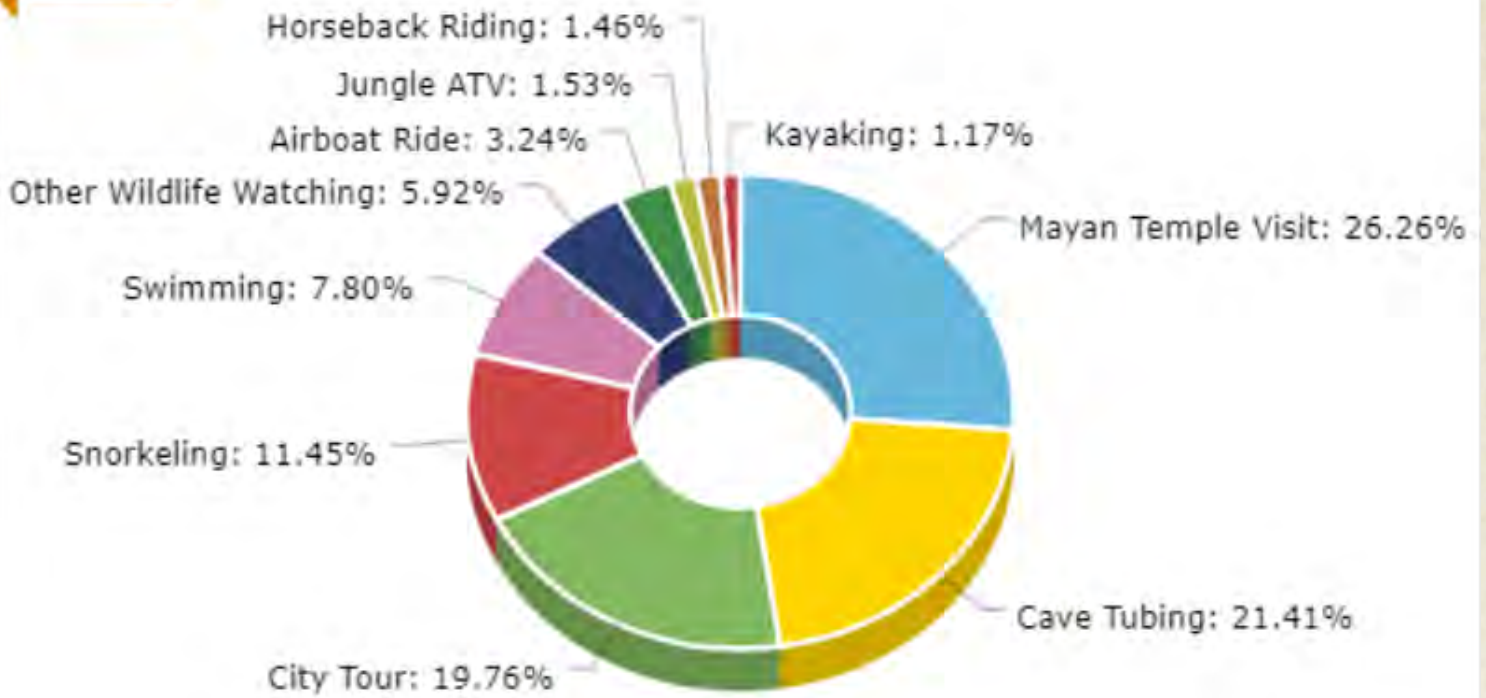
Table 4.9

	2017
Mayan Temple Visit	90,859
Cave Tubing	74,080
City Tour	68,352
Snorkeling	39,624
Swimming	26,992
Other Wildlife Watching	20,483
Airboat Ride	11,214
Jungle ATV	5,291
Horseback Riding	5,039
Kayaking	4,032
	345,966

TOP 10 ACTIVITIES OF CRUISE VISITORS

Fig 4.7

Top 10 Activities of Cruise Visitors 2017





belize

Visits to
Belize's

P R O T E C T E D A R E A S

& ARCHAEOLOGICAL SITES

2011-2017

Section V

Visits to Protected Areas in Belize

The greatest appeal to visitors is Belize's diverse marine and terrestrial attractions and activities. This section of the report provides information on visits to selected sites by international visitors and Belizeans. This includes visits to both the man-made and natural environments (marine, coastal, and inland).

' "national park" means any area established as a national park in accordance with the provisions of section 3 for the protection and preservation of natural and scenic values of national significance for the benefit and enjoyment of the general public' ;

' "nature reserve" means any area reserved as a scientific reserve in accordance with the provisions of section 3 for the protection of nature be it biological communities or species and to maintain natural processes in an undisturbed state in order to have ecologically representative examples of the natural environment available for scientific study, monitoring, education and the maintenance of genetic resources' ;

' "wildlife sanctuary" means any area reserved as a nature conservation reserve in accordance with the provisions of section 3 for the protection of nationally significant species, groups of species, biotic communities or physical features of the environment requiring specific human manipulation for their perpetuation' ;

' "natural monument" means any area reserved for the protection and preservation of nationally significant natural features of special interest or unique characteristics to provide opportunities for interpretation, education, research and public appreciation' ;

http://www.belizeaudubon.org/new_site/wpcontent/uploads/2014/10/NPSA_215.pdf

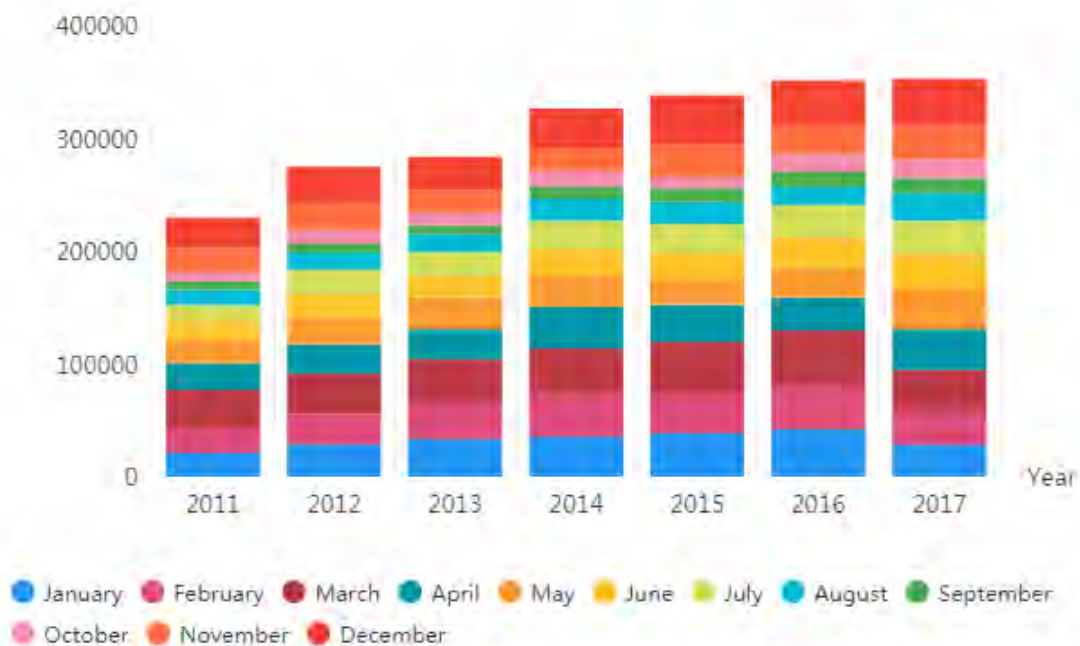


	2011	2012	2013	2014	2015	2016	2017
January	20,933	28,517	33,097	35,793	38,523	42,003	28,111
February	22,148	26,974	31,349	36,500	35,209	39,781	30,905
March	33,595	35,959	39,762	41,151	45,935	47,878	35,718
April	23,797	25,755	26,619	37,463	32,665	28,939	36,043
May	20,212	22,617	28,118	26,793	22,127	26,583	35,438
June	17,567	22,021	19,498	24,445	23,838	27,231	31,470
July	14,161	21,599	20,573	24,640	25,524	28,313	29,173
August	13,344	14,975	15,765	19,739	19,975	16,310	24,918
September	7,063	7,991	8,142	10,630	11,755	13,235	12,943
October	8,467	11,604	11,276	13,560	10,188	15,483	16,522
November	21,371	24,153	19,956	20,611	28,080	26,140	30,354
December	27,110	32,599	29,534	34,936	44,016	39,442	41,031
TOTAL:	229,768	274,764	283,689	326,261	337,835	351,338	352,626

Visitors to the Major Archaeological Sites by Month

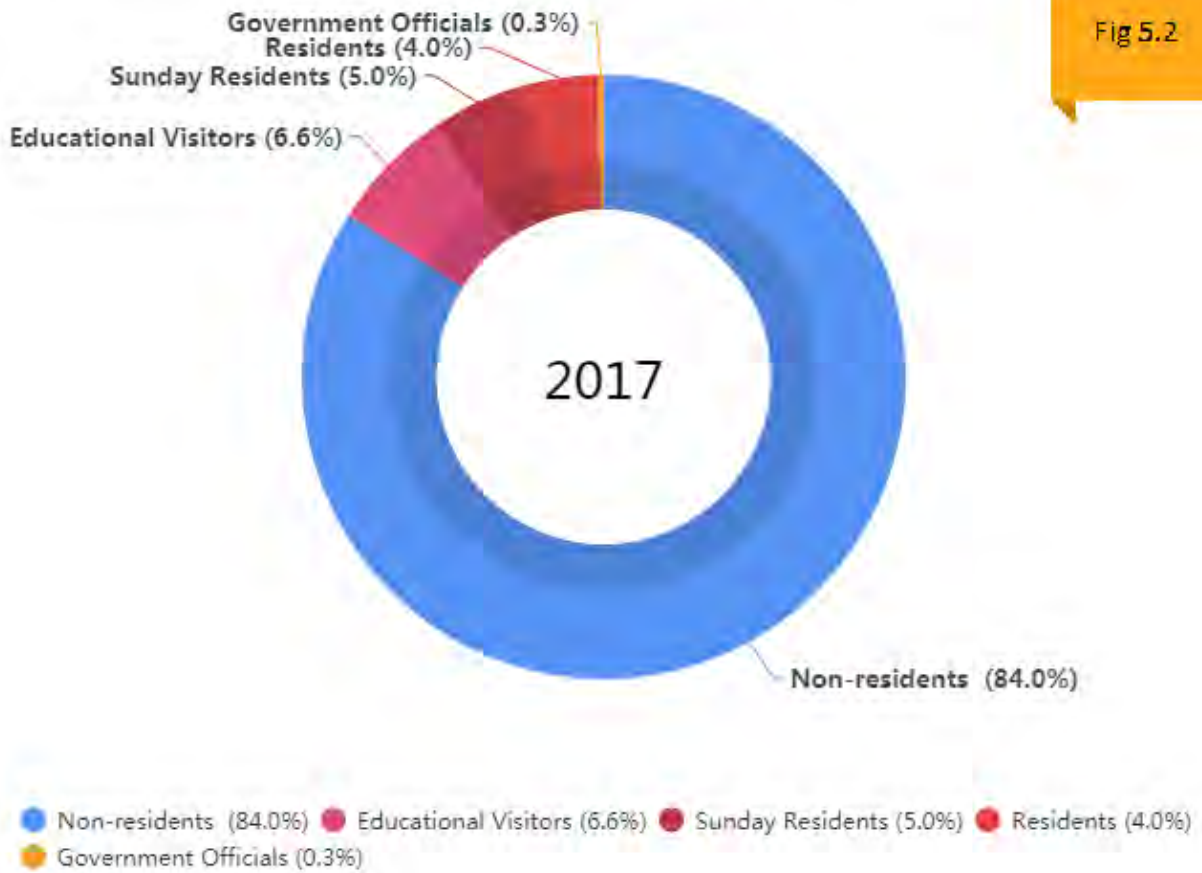
Fig 5.1

Visitors to Major Archaeological Sites



Types of Visitors to Archaeological Sites

Fig 5.2



Protected Sites Managed by the Institute of Archaeology



Table 5.2

	2011	2012	2013	2014	2015	2016	2017
Altun Ha	80,834	83,823	96,336	109,222	100,705	109,077	84,287
Cahal Pech	16,746	23,875	25,125	27,571	36,002	29,219	34,690
Lamanai	39,508	42,483	47,298	55,283	56,084	63,523	72,198
Xunantunich	51,087	73,932	63,944	81,000	85,384	88,651	86,936
Caracol	9,119	10,679	11,174	10,855	9,822	9,029	13,325
Nim Li Punit	5,136	6,462	7,345	6,953	7,396	8,033	15,426
Lubaantun	4,847	5,450	5,358	5,181	4,757	4,666	5,824
Cerros	2,649	2,923	2,842	810	848	1,097	858
El Pilar	608	972	411	268	711	749	833
Barton Creek	4,418	4,778	5,481	5,689	8,016	7,219	7,157
Tunichil Muknal	14,816	19,387	17,654	21,507	26,035	27,646	30,082
Serpon			79	130	274	213	167
Santa Rita			537	955	1,077	1,673	1,240
Marco Gonzales			105	837	724	543	
TOTAL:	229,768	274,764	283,689	326,261	337,835	351,338	353,023

Visitors to the Major Archaeological Sites by Location

Fig 5.3

% VISITORS TO ARCHAEOLOGICAL SITES 2017

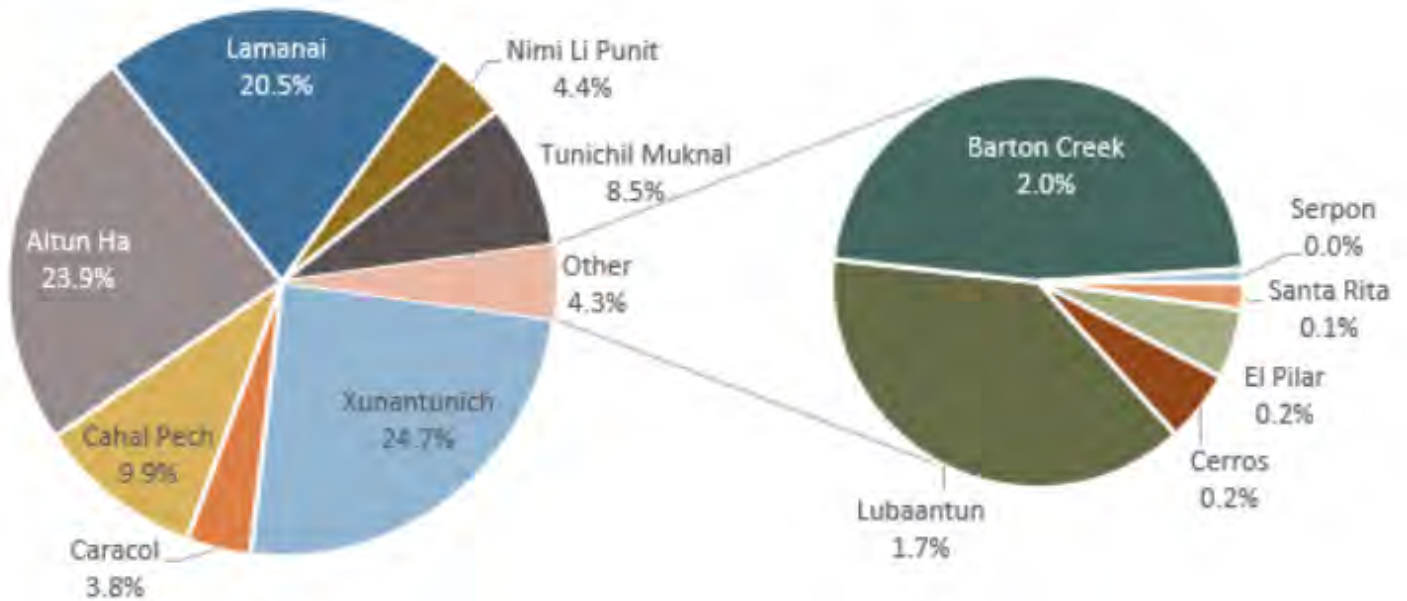
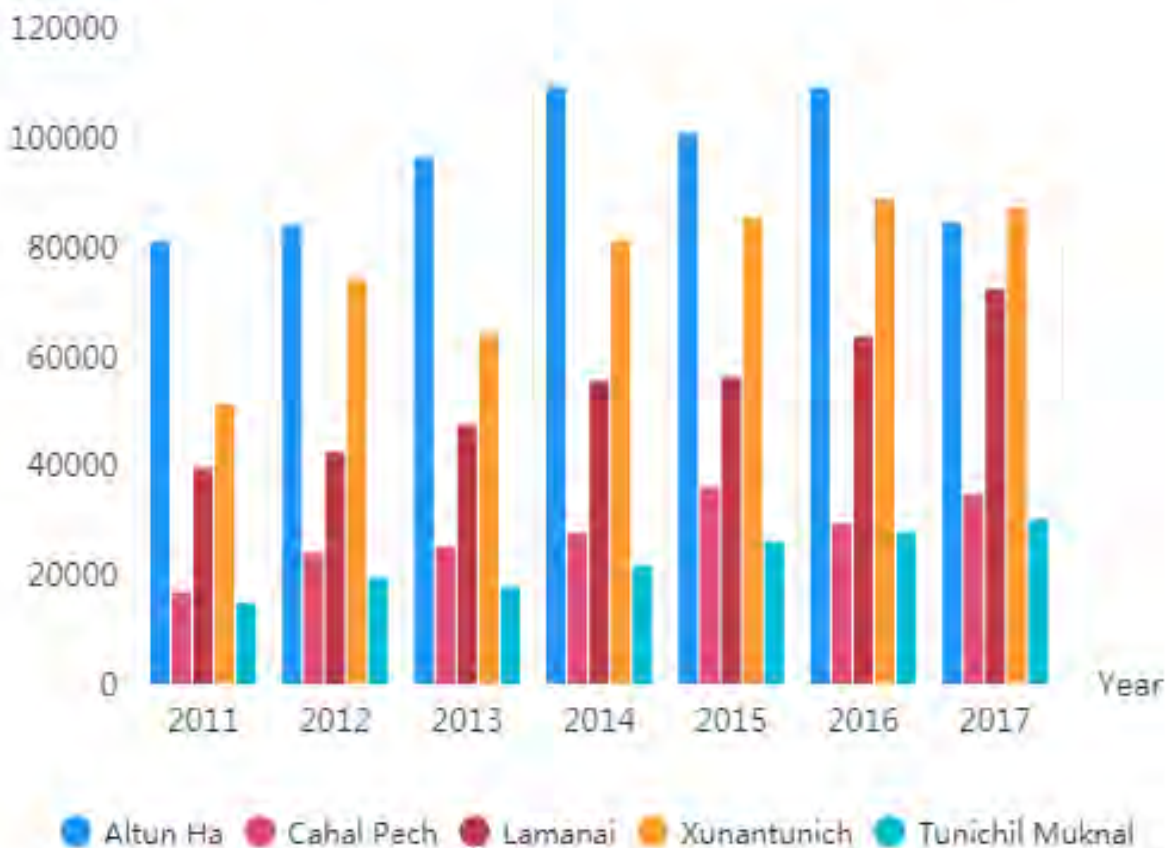


Fig 5.4

Annual Visitors to Archaeological Sites





	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Non-residents	7,291	5,672	10,863	8,874	5,476	7,623	7,267	4,805	2,706	2,829	3,774	5,530
Belizean	0	0	15	0	0	0	2	0	0	0	0	0
Government	0	0	0	0	0	0	0	0	0	0	0	0
School trips	0	0	0	91	275	135	0	0	0	34	0	29
Sunday Belizeans	198	162	132	781	1,607	426	300	207	182	450	47	140
Cruise Ship Visitors	7,364	6,329	12,244	7,428	6,045	7,818	5,648	3,060	3,723	3,477	6,124	7,400
Monthly Total:	14,853	12,163	23,254	17,174	13,403	16,002	13,217	8,072	6,611	6,790	9,945	13,099

Visitors to Caves Branch 2016



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Non-residents	7,289	6,013	12,793	8,018	4,235	4,911	7,833	6,508	3,171	2,742	2,148	10,229
Belizean	4	0	0	0	0	6	0	6	0	53	0	0
Government	0	0	0	6	0	0	0	8	3	4	5	11
School trips	0	0	0	96	105	0	0	0	0	17	7	0
Sunday Belizeans	25	113	0	1,527	394	119	0	1,094	587	430	70	0
Cruise Ship Visitors	9,408	7,526	12,482	8,233	3,835	3,260	8,066	6,137	4,587	112	1,615	10,657
Monthly Total:	16,726	13,652	25,275	17,880	8,569	8,296	15,899	13,753	8,348	3,358	3,845	20,897

Visitors to Caves Branch 2017

Protected Areas Managed by the Belize Audobon Society

The Belize Audobon Society (BAS) is a non-governmental environmental organization that was founded in 1969. The organization is primarily concerned with the sustainable management of Belize's precious natural resources. There are several natural sites in Belize that are managed by the Belize Audobon Society. Once a year the BAS provides the Belize Tourism Board with updated information on visits to these various protected areas. Some of that information is listed below:

Blue Hole Natural Monument - BHNM

Cockscomb Basin Wildlife Sanctuary - CBWS

Crooked Tree Wildlife Sanctuary - CTWS

Guanacaste National Park - GNP

Half Moon Caye Natural Monument - HMCNM

St. Herman's Blue Hole National Park - SHBHNP

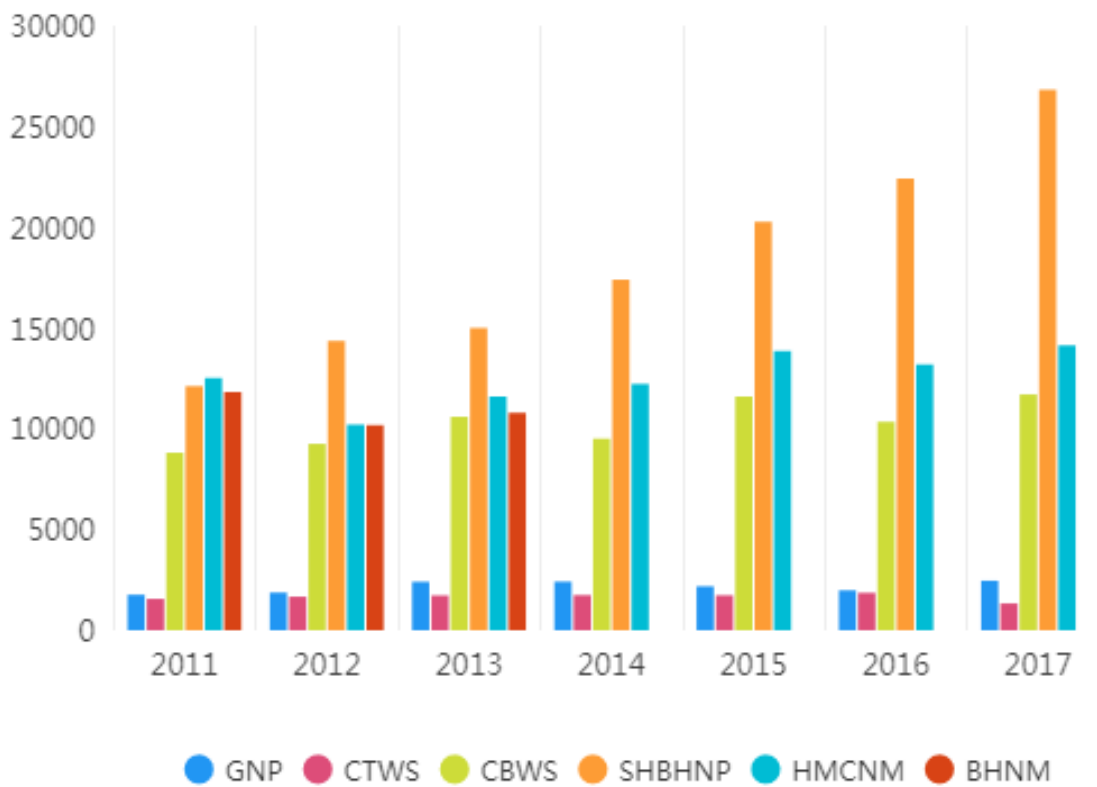
Table 5.5

	2011	2012	2013	2014	2015	2016	2017
Guanacaste National Park	1,761	1,869	2,406	2,412	2,179	1,980	2,458
Crooked Tree Wildlife Sanctuary	1,557	1,665	1,726	1,743	1,734	1,856	1,329
Cockscomb Basin Wildlife Sanctuary	8,810	9,251	10,591	9,504	11,609	10,340	11,701
St Hermans Blue Hole National Park (Inland)	12,114	14,372	15,010	17,411	20,263	22,408	26,832
Half Moon Caye Natural Monument	12,530	10,205	11,604	12,222	13,861	13,185	14,123
Blue Hole National Monument	11,820	10,172	10,787				
TOTAL:	48,592	47,534	52,124	43,292	49,646	49,769	56,443

Visitors to Protected Area Sites

Fig 5.5

Visitors to Protected Area Sites



HOL CHAN MARINE RESERVE

" Off the southern tip of Ambergris Caye is Belize's oldest marine reserve, the Hol Chan Marine Reserve. Hol Chan is Mayan for 'little channel.'" The entire reserve focuses on a cut through the reef (called a quebrada) which is little more than 25 yards (23 m) wide and 30 feet (9 m) deep about 4 miles southeast of San Pedro. The reserve was formed primarily as a community-based initiative due to concern over the high level of uncontrolled, often destructive fishing and diving activities in the area.

Reserve status was also called for by international organizations such as the New York Zoological Society (NYZS) and Peace Corps, due to the unique formation of the channel, the abundant fishery resources (including conch and lobster) and the feasibility of including an interlinked system of coral reef, seagrass and mangrove habitats in this area. The entire reserve covers approximately three square miles (7.8 sq km) and is divided into four zones:

- Zone A - The Reef
- Zone B - The Seagrass Beds
- Zone C - The Mangroves
- Zone D - Shark Ray Alley

All four zones are clearly marked on the surface by buoys. Zone A through C each represents one of the major marine habitat types in Belize. Zone D was recently added as a location where nurse sharks and southern sting rays congregate. "

<http://www.holchanbelize.org/overview.html>

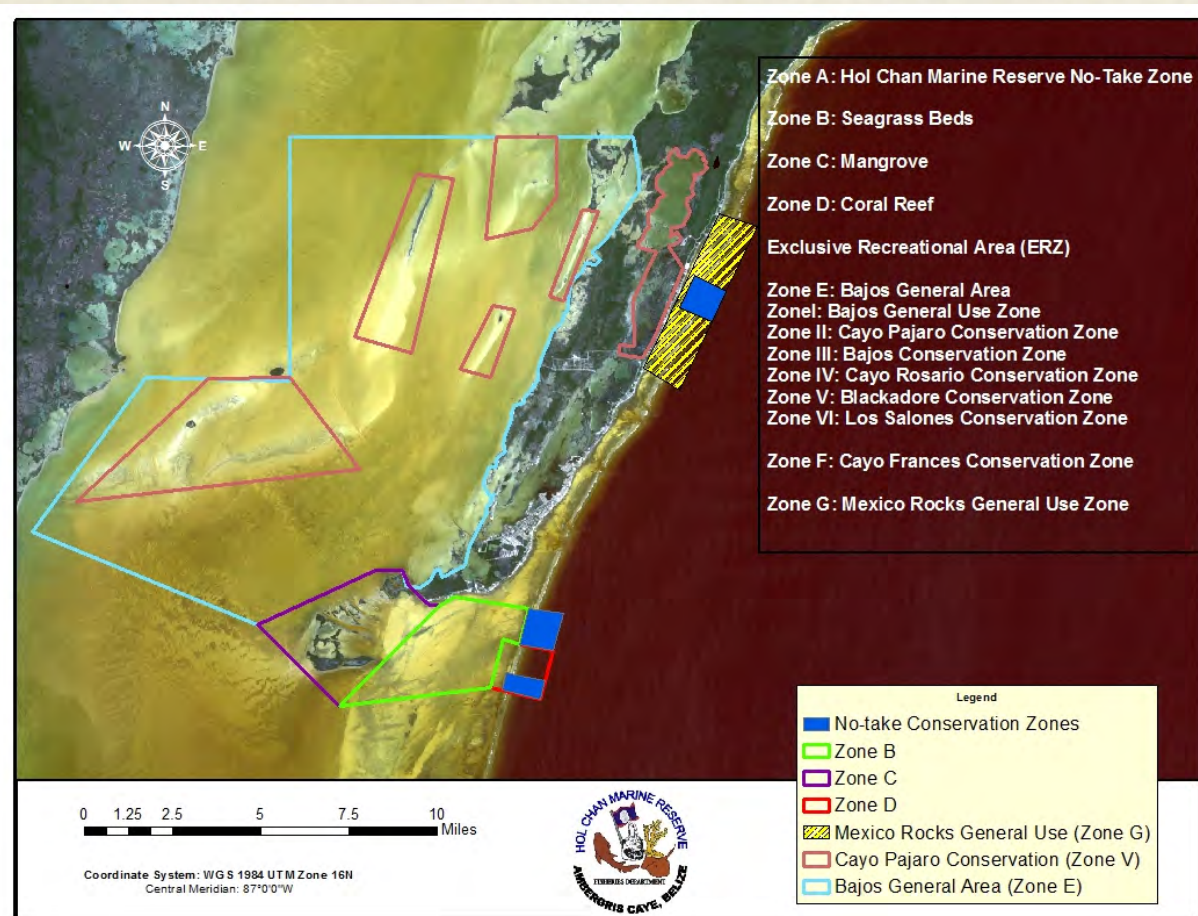




Table 5.6

	2011	2012	2013	2014	2015	2016	2017
January	5,350	4,950	6,357	6,880	7,333	8,557	9,773
February	5,435	5,277	6,660	7,135	6,724	7,200	9,071
March	6,616	8,348	8,593	9,014	9,243	8,465	10,542
April	5,743	7,360	6,114	7,684	7,669	7,272	9,674
May	4,365	5,773	6,131	6,257	5,535	6,542	7,283
June	3,857	5,569	5,975	5,881	6,035	6,455	8,977
July	5,273	5,913	6,508	7,597	7,400	7,937	10,256
August	4,725	4,861	6,153	6,865	6,880	5,432	8,111
September	1,978	2,863	2,268	2,697	3,487	3,516	3,465
October	1,992	2,533	2,650	2,685	3,690	4,105	3,822
November	3,950	4,507	4,234	4,511	6,064	5,151	6,756
December	5,637	7,638	7,066	7,181	9,069	10,746	9,963
TOTAL:	54,921	65,592	68,709	74,387	79,129	81,378	97,693

Visitors to Hol Chan & Shark Ray Alley by Month

Fig 5.7

Visitors to Hol Chan & Shark Ray Alley by Month

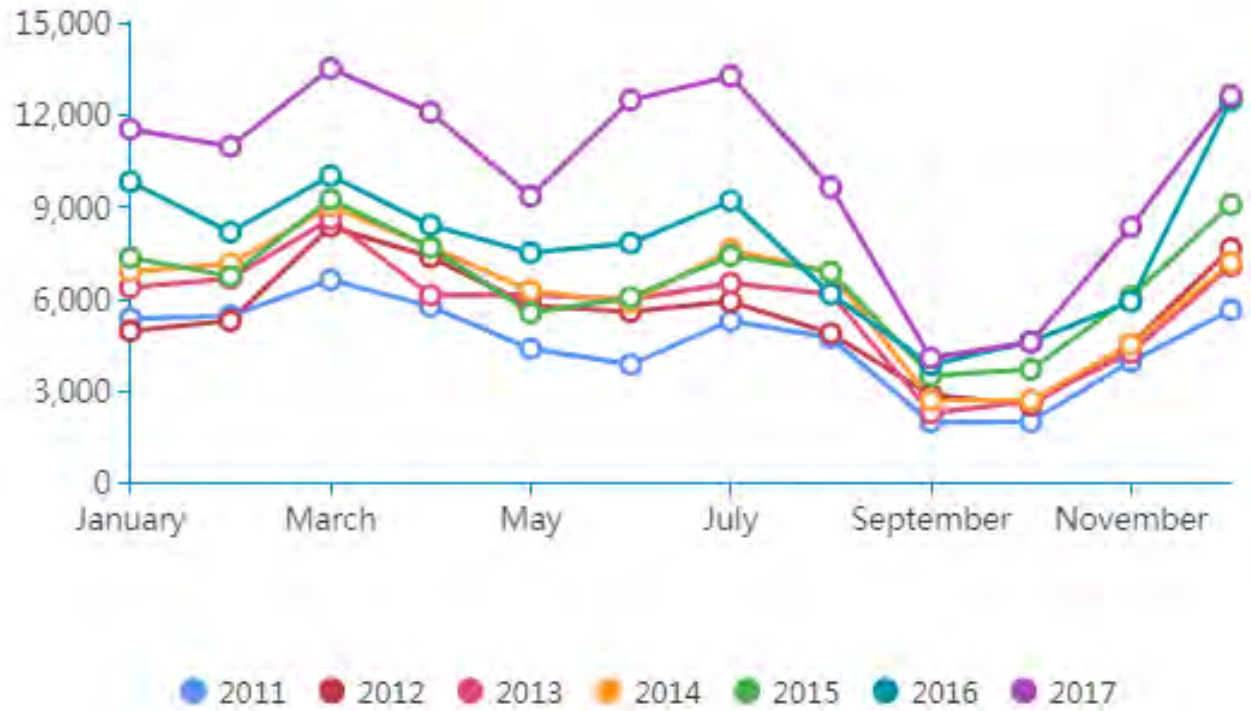




Table 5.7

	2011	2012	2013	2014	2015	2016	2017
Belizeans	3,213	4,543	5,446	6,349	7,980	7,414	4,937
Divers	6,599	5,578	6,452	6,917	5,746	5,932	6,247
Snorkelers	45,109	55,471	56,811	61,121	65,403	68,032	86,509
TOTAL:	54,921	65,592	68,709	74,387	79,129	81,378	97,693

Divers & Snorkelers to Hol Chan & Shark Ray Alley

Divers & Snorkelers to Hol Chan & Shark Ray Alley

Fig 5.8



Table 5.8

2017	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Belizeans	291	278	310	603	399	315	760	587	372	213	407	402
Divers	635	546	690	552	432	746	553	502	160	249	463	719
Snorkelers	8,847	8,247	9,542	8,519	6,452	7,916	8,943	7,022	2,933	3,360	5,886	8,842
Monthly Total:	9,773	9,071	10,542	9,674	7,283	8,977	10,256	8,111	3,465	3,822	6,756	9,963

Divers and Snorkelers to Mexico Rocks 2017

Fig 5.9

Divers & Snorkelers to Mexico Rocks 2017



Mexico Rocks became a part of the Hol Chan Marine Reserve in 2015 following approval by Cabinet.

" the area has been marked, which acts as an indicator to fishermen and tour operators that only recreational activities are allowed within the area, and no extraction of any kind of marine resources (alive or dead) is allowed. With the expansion, the area was sectioned off into two zones. Zone G is the Mexico Rocks General Use Area, while Zone H is the Mexico Rocks No Take Zone. The Mexico Rocks General Use Area is a common snorkeling and dive destination here on Ambergris Caye, and is visited by hundreds every week. "

<https://www.sanpedrosun.com/entertainment/2015/07/27/mexico-rocks-to-slowly-transition-into-a-marine-reserve/>

Accommodation Sector

PERFORMANCE

2011-2017



Section VI

belize

A CURIOUS PLACE



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Accommodation Sector Performance

The accommodation sector in Belize is governed by the Hotels and Tourist Accommodation Act Revised Edition 2003, and is regulated by the Belize Tourism Board (BTB) via the office of the Registrar of Hotels. A hotel is defined as “any building containing not less than 10 bedrooms for the accommodation for reward of guests” or “any building containing a group of units containing not less than 10 units, and such units may consist of buildings, cottages, cabanas, apartments, or otherwise for the accommodation of guests for reward, situated within the same complex or precincts”. For reporting purposes, all accommodation establishments are referred to as ‘hotels’ and each must comply with the legislated minimum standards.

"The Belize Tourism Board (BTB) is legislated by the Laws of Belize to collect and manage tourist accommodation tax. This 9% tourist accommodation tax is used to effectively and efficiently fulfill the BTB's mandated operations for sustaining, marketing and developing Belize's tourism industry. Hotels and Tourist Accommodations are required to collect this 9% tax from each guest, on behalf of the Government of Belize. This tax is then paid to the BTB." <http://www.belize tourismboard.org/industry-sectors/hotel-and-tourist-accommodation-taxes/>

belize



Table 6.1

	2011	2012	2013	2014	2015	2016	2017
Belize District	54	55	58	57	58	62	62
Caye Caulker	86	87	90	105	108	118	125
Cayo	110	114	118	122	125	139	137
Corozal	37	33	34	33	33	29	30
Orange Walk	22	21	20	23	23	21	22
Placencia	113	119	121	135	156	155	153
Ambergris Caye	154	153	163	166	172	170	169
Stann Creek	60	61	69	81	91	92	86
Toledo	39	39	39	40	40	36	38
Other Islands	41	41	45	43	44	39	34
TOTAL	716	723	757	805	850	861	856

Number of Hotels By Area

Fig 6.1

Number of Hotels by Area

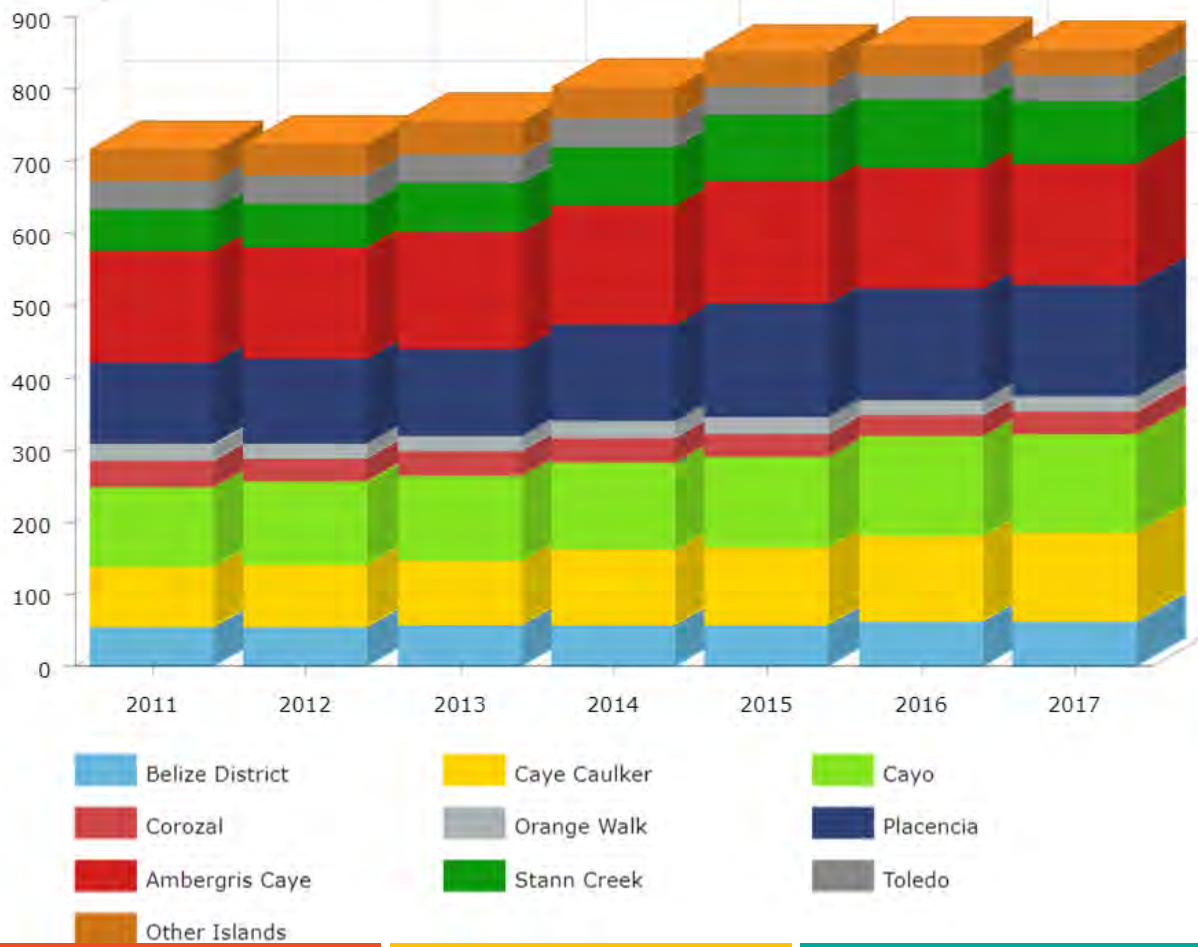




Table 6.2

	2011	2012	2013	2014	2015	2016	2017
Belize District	938	942	1107	931	930	917	933
Caye Caulker	629	610	680	713	726	851	882
Cayo	1,098	1,118	1,107	1,143	1,174	1,256	1,275
Corozal	358	327	334	368	371	346	371
Orange Walk	262	260	258	289	291	264	287
Placencia	721	730	764	764	842	961	993
Ambergris Caye	1,862	1,716	1,841	1,833	1,898	2,231	2,086
Stann Creek	542	544	562	608	649	685	645
Toledo	315	312	324	323	323	291	327
Other Islands	386	373	400	392	415	410	378
TOTAL	7,111	6,932	7,377	7,364	7,619	8,212	8,177

Number of Rooms By Area

Fig 6.2

Number of Rooms by Area

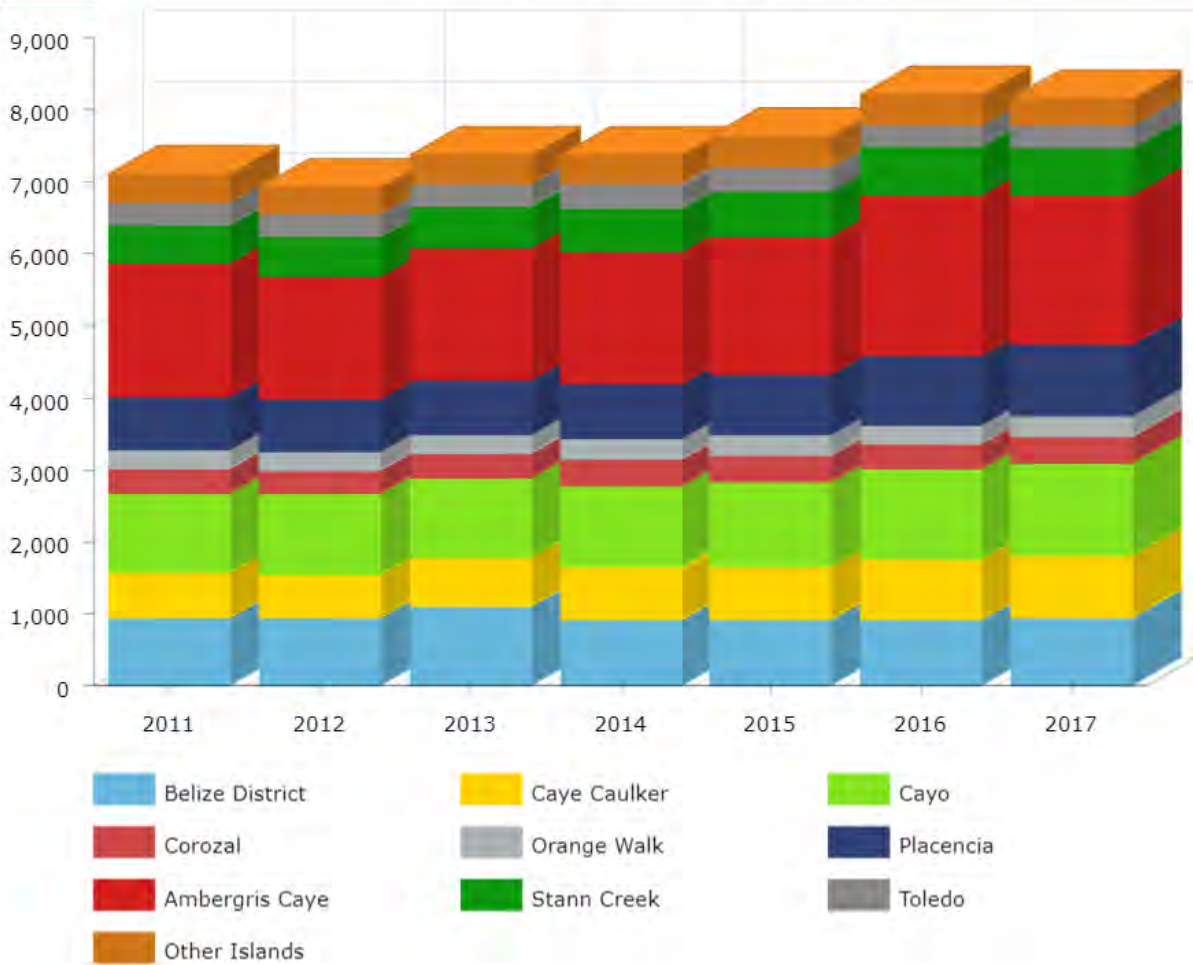




Table 6.3

	2011	2012	2013	2014	2015	2016	2017
Belize District	1,468	1,810	2,082	1,394	1,387	1,393	1,328
Caye Caulker	1,034	997	1,125	1,177	1,197	1,329	1,369
Cayo	1,908	1,908	1,965	2,049	2,097	2,277	2,367
Corozal	529	494	502	565	577	545	571
Orange Walk	469	463	441	471	518	473	513
Placencia	1,131	1,193	1,215	1,291	1,434	1,416	1,589
Ambergris Caye	3,364	3,013	3,318	3,388	3,427	3,195	3,351
Stann Creek	897	915	966	1,082	1,130	1,010	1,037
Toledo	628	603	668	624	637	572	666
Other Islands	685	662	733	763	807	722	655
TOTAL	12,113	12,058	13,015	12,804	13,211	12,932	13,446

Number of Beds by Area

Fig 6.3

Number of Beds by Area

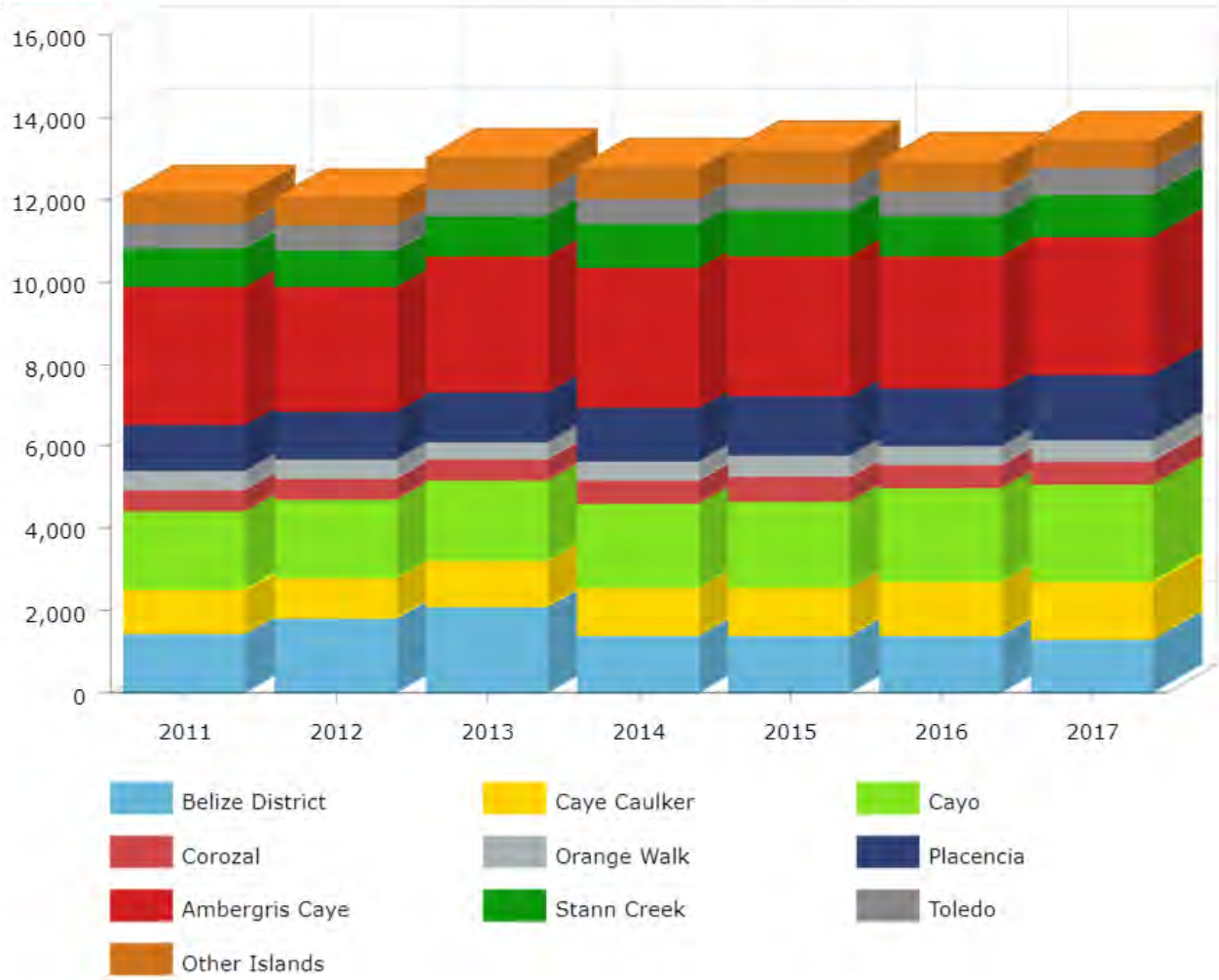




Table 6.4

	1-10	11-20	21-50	> 50	Total
Belize District	40	11	8	3	62
Caye Caulker	99	21	4	1	125
Cayo	96	30	10	1	137
Corozal	21	3	5	1	30
Orange Walk	11	7	4	0	22
Placencia	16	15	3	0	34
Ambergris Caye	133	11	7	2	153
Stann Creek	114	26	23	6	169
Toledo	69	13	3	1	86
Other Islands	28	9	1	0	38
TOTAL	627	146	68	15	856
% of Total	73.25%	17.06%	7.94%	1.75%	100.00%

Hotels by Room Size By Region 2017

Most accommodations in Belize are small boutique-type establishments. The vast majority of properties in the country have less than 20 rooms. This dynamic has certain implications. It means that Belize is not ideally equipped to accommodate large groups of visitors attending a convention, and who might want to all stay in one hotel during their stay in the country. Belize is much better situated to host families, couples and small groups of friends traveling together.



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Belize District	50.0	55.9	50.6	40.8	39.0	44.5	38.4	44.1	38.4	30.7	39.3	31.4	41.8
Caye Caulker	59.9	65.8	58.0	42.1	42.6	31.3	44.6	32.3	25.4	25.0	36.2	42.0	42.0
Cayo	40.3	53.4	46.3	35.9	31.3	33.4	34.4	26.3	18.2	20.9	29.0	32.9	33.4
Corozal	27.4	32.4	23.5	21.7	16.5	26.1	28.4	18.4	15.5	16.7	19.7	19.5	22.1
Orange Walk	34.1	36.7	41.4	25.2	24.4	34.8	28.3	26.1	17.0	19.2	44.2	26.8	29.9
Placencia	47.2	54.0	51.3	29.2	27.0	22.1	22.1	20.7	11.4	16.7	25.6	25.2	29.0
Ambergris Caye	57.4	68.1	65.7	43.4	38.9	38.4	45.4	30.9	17.8	24.7	37.4	42.7	41.9
Stann Creek	38.9	51.6	37.1	38.0	29.8	32.8	24.1	30.0	22.0	27.0	27.2	38.9	33.2
Toledo	28.4	21.0	24.2	28.2	25.2	19.0	14.0	15.7	10.3	9.5	16.0	6.2	18.7
Other Islands	46.0	47.5	47.5	31.5	28.2	29.1	29.7	26.6	21.3	25.4	29.7	37.6	33.4
TOTAL	48.5	56.9	52.2	37.9	34.3	34.9	36.5	30.4	21.4	23.8	33.4	35.5	37.0

Hotel Occupancy By Area 2016



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Belize District	45.1	51.8	54.4	44.5	32.5	44.5	53.5	52.8	36.3	34.7	41.9	39.4	44.3
Caye Caulker	54.1	61.5	55.1	48.2	39.2	45.1	45.4	54.3	23.0	28.4	42.2	49.0	45.2
Cayo	53.0	56.1	50.3	45.5	40.5	35.8	45.2	46.3	25.2	28.7	42.3	49.3	43.1
Corozal	33.7	41.8	42.3	35.8	29.8	34.1	42.4	41.9	16.7	18.8	32.4	39.4	34.1
Orange Walk	25.4	34.3	26.5	23.7	19.5	22.8	29.1	22.5	13.3	17.8	16.8	17.2	22.3
Placencia	32.7	43.4	30.9	29.2	17.7	32.2	31.4	30.0	19.7	20.4	22.7	29.4	28.2
Ambergris Caye	36.8	44.6	40.7	43.5	33.6	36.0	36.2	42.5	19.2	26.9	32.2	35.5	35.6
Stann Creek	40.2	45.1	43.9	34.5	29.6	29.1	29.9	43.5	11.0	14.2	25.1	34.4	31.7
Toledo	20.5	28.2	22.6	13.8	18.9	13.5	14.8	7.8	4.1	10.0	17.8	12.7	15.2
Other Islands	34.8	46.8	47.0	47.6	37.2	31.5	32.7	45.1	25.0	23.4	40.3	34.7	37.1
TOTAL	43.7	51.0	47.7	41.8	33.8	37.9	42.0	46.5	22.1	25.3	36.3	40.8	39.0

Hotel Occupancy By Area 2017



Table 6.7

	2011	2012	2013	2014	2015	2016	2017
Belize District	38.6	43.2	54.8	56.7	46.7	41.8	44.3
Caye Caulker	44.3	43.2	46.0	51.1	50.3	42.0	45.2
Cayo	38.2	40.2	40.0	43.8	44.3	33.4	43.1
Corozal	28.5	30.4	28.9	31.4	19.4	22.1	34.1
Orange Walk	39.9	38.7	44.6	38.1	36.5	29.9	22.3
Placencia	38.5	33.0	39.6	36.9	32.2	29.0	28.2
Ambergris Caye	43.7	47.7	51.1	48.0	47.0	41.9	35.6
Stann Creek	36.1	48.1	58.0	53.7	57.7	33.2	31.7
Toledo	30.9	27.2	30.8	30.0	30.4	18.7	15.2
Other Islands	27.9	34.8	34.2	32.5	28.5	33.4	37.1
TOTAL	39.3	42.1	46.5	45.9	42.8	37.0	39.0

Annual Hotel Occupancy By Region

Hotel Occupancy By Region 2013-17

Fig 6.4



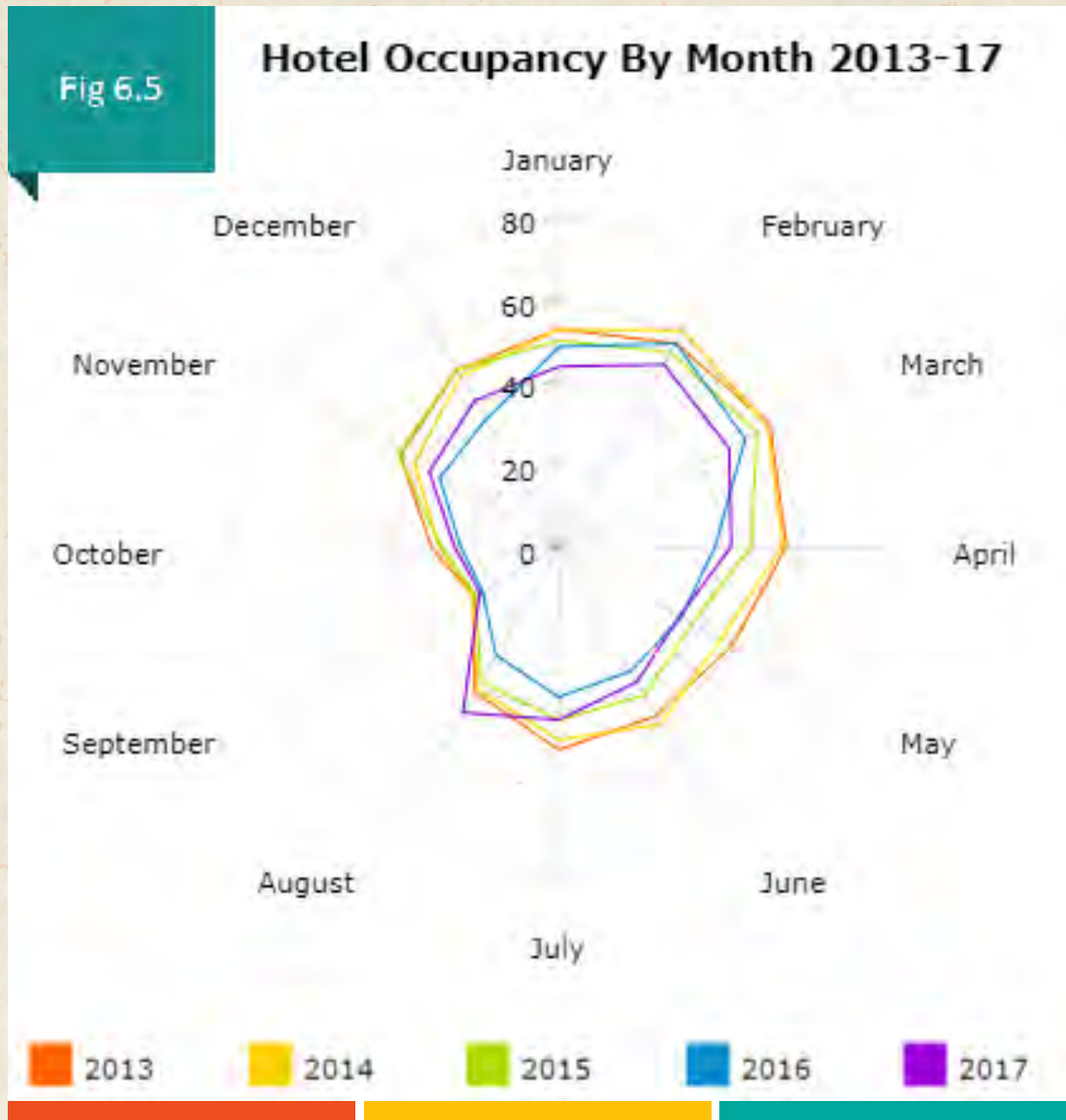


Table 6.8

	2011	2012	2013	2014	2015	2016	2017
January	45.7	42.0	52.8	52.7	50.0	48.5	43.7
February	55.5	54.4	56.9	60.4	54.3	56.9	51.0
March	50.6	53.7	59.1	58.5	55.4	52.2	47.7
April	41.9	49.7	55.2	54.2	46.7	37.9	41.8
May	37.9	42.1	48.4	45.2	37.3	34.3	33.8
June	38.7	40.0	47.4	49.7	41.6	34.9	37.9
July	38.3	43.2	49.3	46.9	42.1	36.5	42.0
August	31.9	39.8	40.7	39.7	37.7	30.4	46.5
September	24.9	25.8	23.9	24.0	23.3	21.4	22.1
October	22.3	26.1	30.9	29.0	28.5	23.8	25.3
November	33.3	43.1	44.3	40.4	45.0	33.4	36.3
December	45.6	48.9	49.4	47.7	49.5	35.5	40.8
TOTAL	39.3	42.1	46.5	45.9	42.8	37.0	39.0

Annual Hotel Occupancy By Month

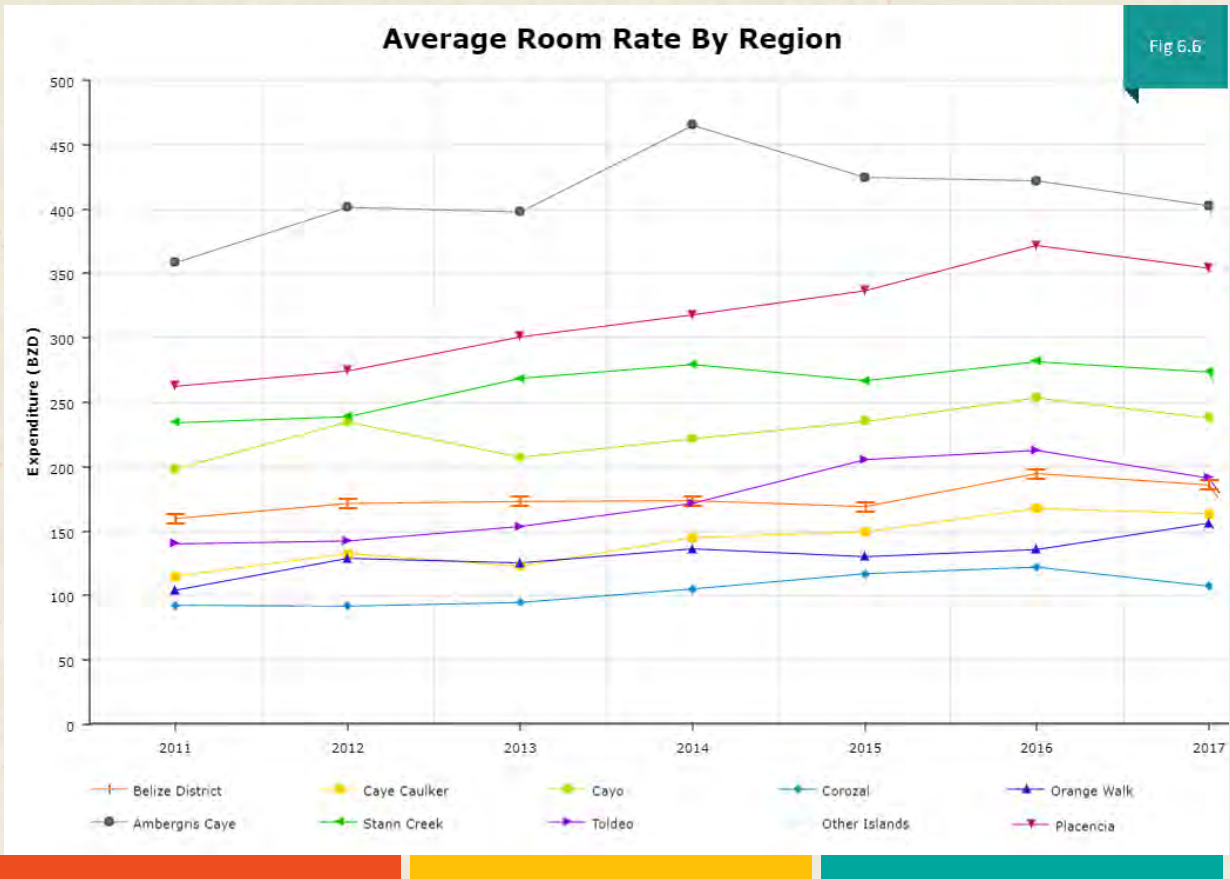
Historically, the strongest month in terms of occupancy performance is February. Oddly enough, this lags behind the strongest month for overnight visitor arrivals, which is March. This suggests that the bulk of visitor arrivals around this time period might occur between the middle of February and the middle of March, as opposed to being skewed towards the tail end of March.





	2011	2012	2013	2014	2015	2016	2017
Belize District	\$159.85	\$171.51	\$173.08	\$173.67	\$169.12	\$194.72	\$185.88
Caye Caulker	\$115.19	\$132.71	\$122.79	\$145.04	\$149.61	\$167.73	\$163.58
Cayo	\$198.25	\$234.77	\$207.34	\$221.75	\$235.08	\$253.42	\$237.75
Corozal	\$92.50	\$91.83	\$94.72	\$105.22	\$117.02	\$122.13	\$107.24
Orange Walk	\$104.18	\$128.94	\$125.41	\$136.31	\$130.23	\$135.74	\$156.34
Placencia	\$262.47	\$274.31	\$300.78	\$317.93	\$336.62	\$371.74	\$354.08
Ambergris Caye	\$358.34	\$401.32	\$397.72	\$464.94	\$424.59	\$421.97	\$402.48
Stann Creek	\$234.15	\$238.86	\$268.60	\$279.36	\$266.82	\$281.51	\$273.42
Toledo	\$140.17	\$142.42	\$153.66	\$171.66	\$205.55	\$212.76	\$191.18
Other Islands	\$213.74	\$236.24	\$216.98	\$258.90	\$291.07	\$317.72	\$294.37
TOTAL	\$225.93	\$257.51	\$253.43	\$285.41	\$278.47	\$294.13	\$283.97

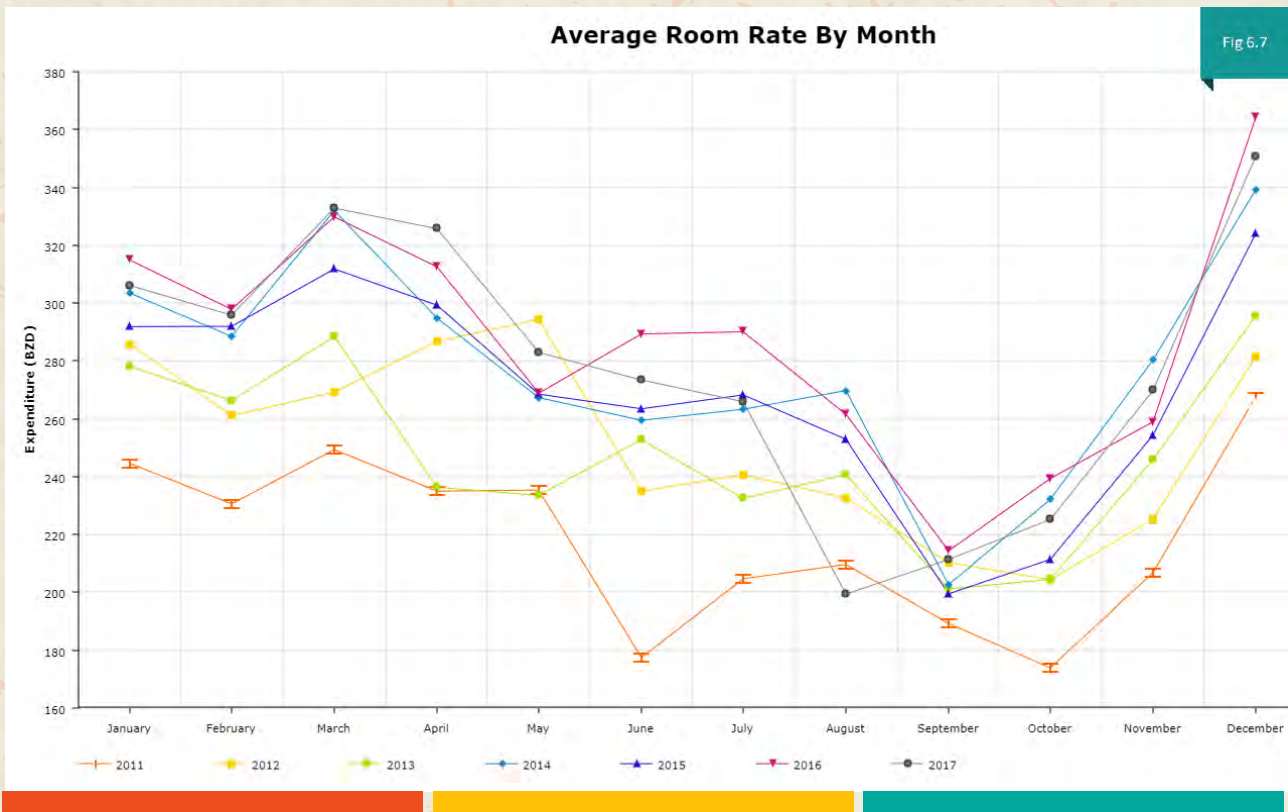
Annual Average Room Rate By Region (BZD)





	2011	2012	2013	2014	2015	2016	2017
January	\$244.61	\$285.86	\$278.18	\$303.46	\$291.86	\$314.88	\$306.07
February	\$230.60	\$261.10	\$266.32	\$288.51	\$291.97	\$297.85	\$295.84
March	\$249.37	\$269.23	\$288.41	\$331.99	\$311.80	\$329.80	\$332.82
April	\$234.99	\$286.77	\$236.34	\$294.81	\$299.28	\$312.55	\$325.71
May	\$235.37	\$294.39	\$233.56	\$267.33	\$268.53	\$268.88	\$282.96
June	\$177.47	\$235.05	\$252.79	\$259.50	\$263.48	\$289.34	\$273.41
July	\$204.73	\$240.61	\$232.54	\$263.31	\$268.27	\$290.09	\$265.95
August	\$209.67	\$232.64	\$240.70	\$269.78	\$252.94	\$261.57	\$199.42
September	\$189.26	\$210.30	\$201.21	\$202.66	\$199.52	\$214.38	\$211.40
October	\$173.92	\$204.38	\$204.53	\$232.17	\$211.41	\$239.37	\$225.20
November	\$206.85	\$225.37	\$245.89	\$280.38	\$254.37	\$258.98	\$269.83
December	\$267.65	\$281.53	\$295.60	\$339.22	\$324.01	\$364.19	\$350.66
TOTAL	\$225.93	\$257.51	\$253.43	\$285.41	\$278.47	\$294.13	\$283.97

Annual Average Room Rate By Month (BZD)





	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Belize District	\$98.60	\$106.57	\$106.70	\$89.95	\$77.43	\$95.02	\$93.05	\$85.10	\$74.61	\$60.09	\$80.08	\$85.41	\$87.60
Caye Caulker	\$128.13	\$129.95	\$119.83	\$86.71	\$79.11	\$70.98	\$85.47	\$61.04	\$40.70	\$39.89	\$62.39	\$92.35	\$83.03
Cayo	\$140.16	\$166.65	\$164.99	\$120.14	\$82.74	\$99.03	\$103.97	\$73.18	\$38.13	\$53.46	\$81.97	\$145.22	\$105.65
Corozal	\$37.01	\$41.63	\$36.24	\$28.36	\$24.08	\$36.77	\$41.01	\$23.77	\$19.12	\$24.43	\$25.44	\$24.50	\$30.17
Orange Walk	\$58.27	\$98.09	\$106.79	\$49.74	\$34.88	\$44.37	\$41.30	\$33.76	\$19.16	\$24.20	\$30.54	\$51.31	\$49.27
Placencia	\$184.92	\$218.60	\$231.56	\$141.65	\$95.69	\$109.84	\$95.42	\$72.15	\$18.45	\$44.41	\$76.73	\$148.32	\$118.14
Ambergris Caye	\$257.43	\$268.05	\$276.93	\$170.71	\$133.97	\$140.00	\$166.11	\$106.95	\$58.17	\$82.25	\$136.19	\$203.58	\$163.94
Stann Creek	\$145.27	\$182.06	\$162.88	\$142.64	\$103.43	\$108.03	\$100.38	\$106.37	\$44.86	\$81.35	\$96.73	\$156.41	\$120.20
Toledo	\$41.30	\$33.07	\$42.43	\$35.92	\$32.47	\$37.89	\$27.91	\$27.87	\$15.38	\$15.84	\$45.89	\$23.42	\$31.80
Other Islands	\$152.86	\$148.60	\$161.39	\$142.88	\$103.71	\$106.89	\$94.18	\$70.95	\$70.95	\$70.37	\$75.39	\$133.26	\$111.09
TOTAL	\$163.31	\$179.02	\$181.55	\$124.86	\$96.20	\$105.08	\$112.36	\$82.99	\$48.90	\$61.54	\$93.13	\$141.39	\$115.28

Revenue Per Available Room by Region 2016



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
Belize District	\$91.95	\$99.01	\$110.01	\$88.65	\$82.70	\$84.65	\$103.03	\$89.11	\$68.69	\$70.75	\$82.42	\$78.49	\$87.47
Caye Caulker	\$110.91	\$114.83	\$101.76	\$99.88	\$73.03	\$65.42	\$81.93	\$76.76	\$37.30	\$41.52	\$74.59	\$109.25	\$81.83
Cayo	\$105.54	\$142.29	\$150.09	\$127.92	\$90.76	\$94.78	\$101.93	\$81.04	\$38.05	\$43.96	\$94.40	\$161.49	\$102.55
Corozal	\$32.96	\$45.57	\$35.49	\$31.06	\$27.22	\$27.93	\$39.05	\$23.78	\$15.32	\$19.90	\$20.28	\$22.01	\$28.23
Orange Walk	\$65.27	\$104.25	\$67.86	\$56.36	\$35.48	\$44.87	\$46.99	\$38.35	\$24.24	\$25.14	\$39.20	\$75.30	\$51.63
Placencia	\$157.29	\$163.76	\$188.83	\$153.01	\$104.70	\$93.03	\$94.65	\$80.87	\$30.79	\$35.55	\$88.89	\$166.37	\$113.01
Ambergris Caye	\$226.66	\$248.24	\$252.10	\$216.08	\$143.23	\$169.86	\$174.91	\$127.86	\$65.23	\$83.01	\$149.69	\$230.00	\$172.19
Stann Creek	\$140.48	\$154.45	\$160.18	\$176.37	\$114.94	\$116.71	\$115.58	\$95.51	\$42.18	\$82.69	\$96.31	\$152.82	\$118.97
Toledo	\$30.70	\$42.97	\$42.67	\$24.56	\$37.60	\$19.69	\$26.12	\$12.68	\$8.33	\$15.90	\$24.21	\$20.15	\$25.22
Other Islands	\$110.11	\$116.72	\$147.23	\$157.85	\$124.98	\$125.42	\$124.91	\$109.16	\$74.38	\$74.47	\$126.99	\$129.12	\$117.34
TOTAL	\$141.78	\$159.90	\$167.13	\$146.63	\$103.82	\$111.24	\$119.84	\$93.41	\$50.54	\$61.49	\$103.88	\$154.81	\$117.37

Revenue Per Available Room by Region 2017



belize

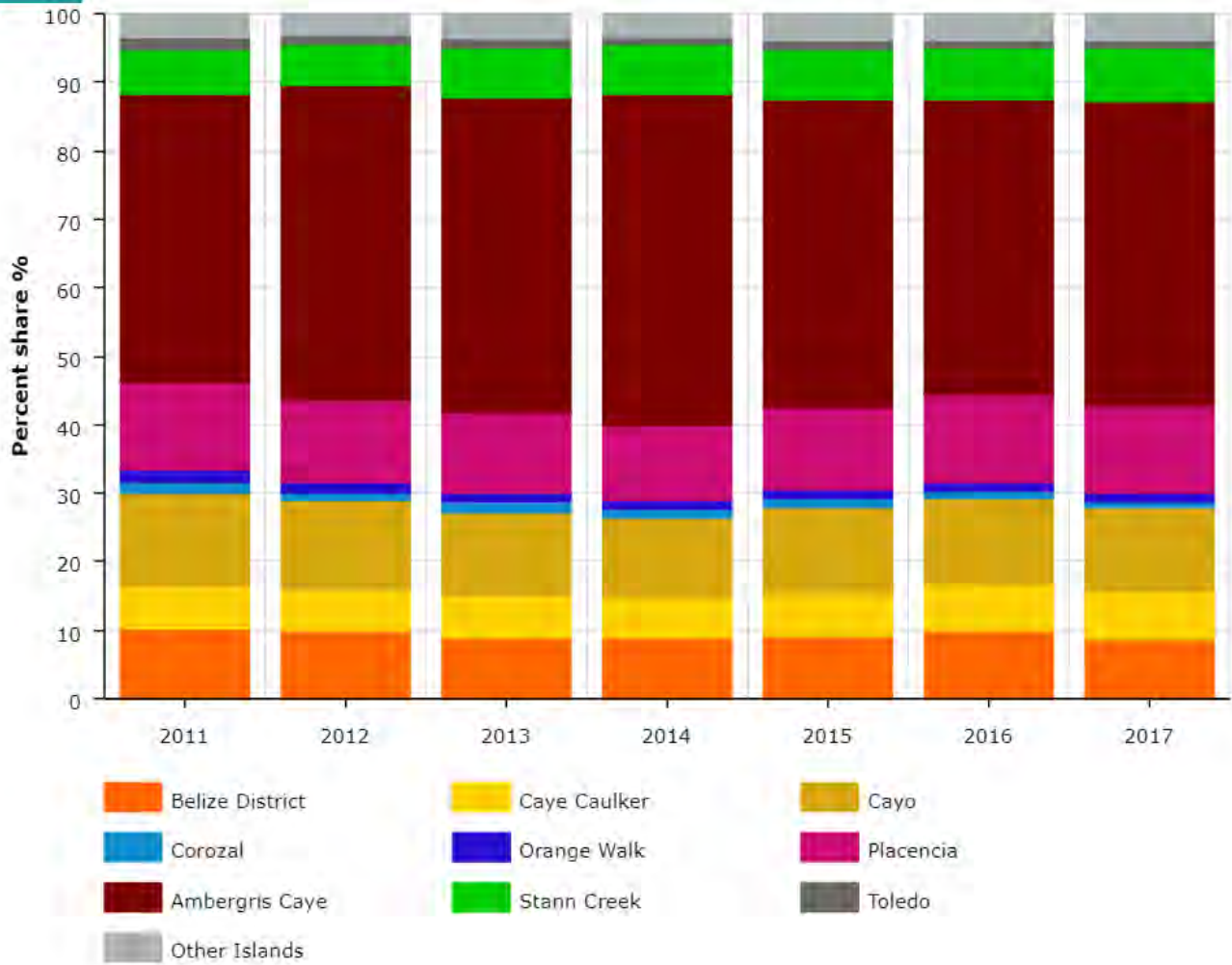
Table 6.13

	2011	2012	2013	2014	2015	2016	2017
Belize District	10.1	10.0	9.0	8.9	9.2	9.9	8.7
Caye Caulker	6.3	5.8	6.1	6	6.3	6.9	7.1
Cayo	13.7	13.0	12.1	11.5	12.4	12.6	12.1
Corozal	1.5	1.2	1.4	1.3	1.2	1.0	1.0
Orange Walk	1.8	1.6	1.4	1.3	1.3	1.2	1.2
Placencia	12.9	11.8	11.7	11	12.1	12.9	12.8
Ambergris Caye	42.1	46.1	45.9	48.3	44.8	42.9	44.5
Stann Creek	6.6	5.9	7.4	7.2	7.4	7.5	7.7
Toledo	1.7	1.2	1.3	1.2	1.3	1.2	1.1
Other Islands	3.4	3.2	3.6	3.3	3.9	3.8	4.0
TOTAL %	100.0	100.0	100.0	100.0	100.0	100.0	100.0
TOTAL \$BZ Million	138.0	162.0	183.0	207.0	227.24	245.3	263.4
%Change		17.4	13.0	13.1	9.8	7.9	7.4

Accommodation Percent Revenue Generated by Region

Fig 6.8

Revenue Percent Generated by Area






Table 6.14

	2011	2012	2013	2014	2015	2016	2017
January	11.9	10.3	10.9	11.4	11.8	11.8	10.4
February	10.1	10.8	10.9	11.2	11.6	12.0	10.6
March	13.2	12.4	12.8	12.9	12.0	13.0	11.9
April	11.2	10.0	9.1	10.0	9.7	9.2	10.3
May	9.4	7.7	7.6	8.3	6.4	7.3	7.4
June	5.0	7.9	7.8	7.4	7.2	7.6	7.7
July	8.6	7.6	7.8	7.9	7.6	8.2	8.6
August	6.9	6.4	6.9	6.6	6.3	5.9	6.6
September	2.5	3.6	3.3	3.0	3.2	3.5	3.5
October	3.2	4.4	4.1	3.9	4.3	4.5	4.3
November	7.2	7.1	7.2	6.7	7.7	6.8	7.3
December	11.0	11.8	11.7	10.8	12.1	10.3	11.5
TOTAL %	100.0	100.0	100.0	100.0	100.0	100.0	100.0
TOTAL \$BZ Million	138.0	162.0	183.0	207.0	227.24	245.3	263.4
%Change		17.4	13.0	13.1	9.8	7.9	7.4

Accommodation Percent Revenue Generated by Month

While the revenue generated in the accommodation sector has increased every year for the past 7 years, the rate of that increase has declined in recent years. There are a multitude of factors at play when it comes to external impacts on accommodation revenue. Such factors include the changing demographic of visitors, as well as increased diversity of accommodation options on offer within popular destinations.

Fig 6.9

Revenue Percent Generated by Month

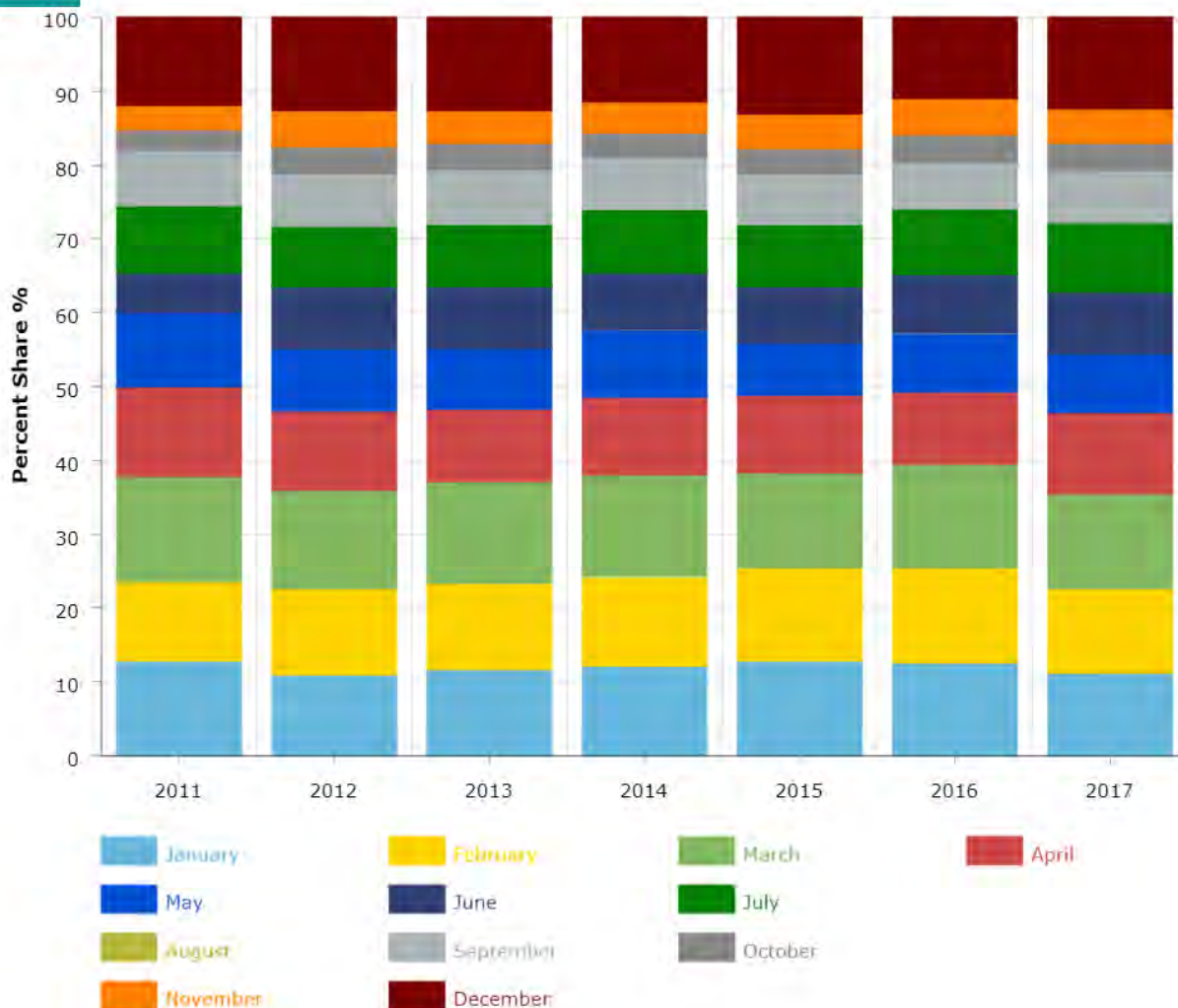


Table 6.15

	2011	2012	2013	2014	2015	2016	2017
1 st Quarter	35.2	32.1	31.7	33.2	35.4	36.8	32.9
2 nd Quarter	25.5	26.5	30.6	31.0	23.3	24.1	25.4
3 rd Quarter	18.0	17.7	22.3	22.0	17.1	17.6	18.6
4 th Quarter	21.3	23.6	15.4	13.8	24.1	21.5	23.1
TOTAL %	100.0	100.0	100.0	100.0	100.0	100.0	100.0
TOTAL \$BZ Million	138.0	162.0	183.0	207.0	227.24	245.3	263.4
%Change	20.0	17.4	13.0	13.1	9.8	7.9	7.4

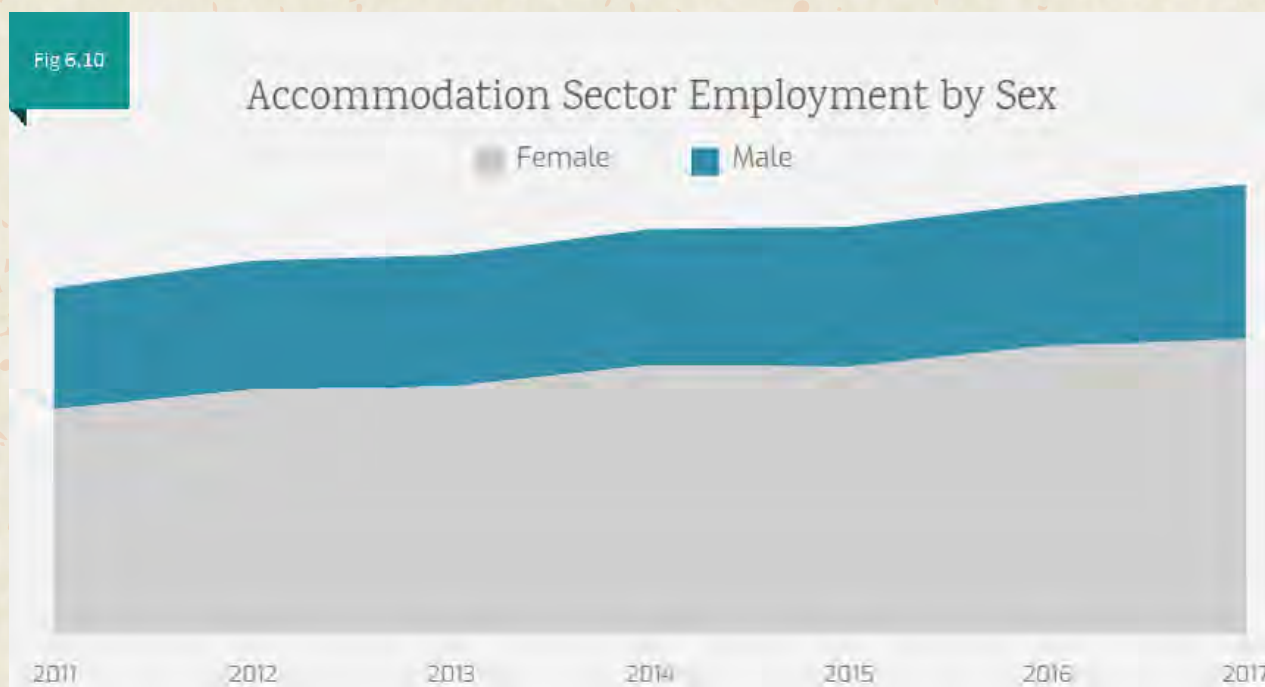
Accommodation Percent Revenue Generated by Quarter



Table 6.16

	2011	2012	2013	2014	2015	2016R	2017
Males	4,451	4,806	4,880	5,213	5,241	5,552	5,795
Females	2,869	3,126	3,162	3,440	3,422	3,691	3,783
Total	7,320	7,932	8,042	8,653	8,663	9,243	9,578
%Change	24.9	8.4	1.4	7.6	0.1	6.7	3.6

Persons Employed in the Accommodation Sector by Sex



Local Economic Indicators & Regional Reports



2011-2017

SECTION VII



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Local Economic Indicators & Regional Tourism Reports

The importance of tourism to Belize's economy cannot be overstated. In addition to being the largest foreign exchange earner in the country, the tourism industry provides jobs to thousands of workers from a broad spectrum of educational and economic backgrounds. The overall employment in the tourism sector serves as a major performance indicator for the tourism industry as a whole, because employment is a key metric in measuring tourism's impact on the nation's economy.

"Visitor Exports" is the spending within a country by international tourists for the purpose of leisure and business travel. This includes spending on transport. This figure is often referred to as the annual tourism expenditure. This information is estimated annually by the Belize Tourism board through the use of certain metrics such as average visitor length of stay, average daily visitor expenditure and monthly visitor arrivals. The Immigration Department of Belize provides the monthly visitor arrival estimates, while the remaining data points are captured through a series of visitor exit surveys conducted at the three main Entry/Exit ports of the country.

Another important method in measuring tourism's performance in Belize is to look at how tourism arrival patterns in the country compares to that of arrival patterns in the other neighboring countries. Belize is a member of the Caribbean Tourism Organization (CTO), the regional agency that coordinates tourism programs and provide tourism services and information for all member countries throughout the region. The CTO collects tourism performance indicators from various member countries and consolidates the information into concise regional reports, so that regional performance indicators can be deduced. The regional reports from the CTO serve as an important gauge for how Belize is performing relative to its next closest competitors in the Caribbean. This is a good way to determine whether tourism performance for the country is following the right trajectory, or whether corrective measures need to be taken to improve the performance of the industry over the short and long term.



	2011	2012	2013	2014	2015	2016	2017
Belize District	315	362	409	505	376	528	472
Ambergris Caye	188	252	266	305	260	322	296
Caye Caulker	77	94	106	110	95	121	129
Cayo	215	288	339	396	361	431	450
Corozal	35	44	43	44	55	72	59
Orange Walk	49	60	79	93	91	129	123
Stann Creek	84	79	80	106	85	125	147
Placencia	67	69	98	92	83	112	137
Toledo	57	56	61	83	67	105	109
TOTAL:	1087	1304	1481	1734	1473	1945	1922
% Change:	6.30%	20.00%	13.60%	17.10%	-15.05%	32.00%	-1.2%

NUMBER OF TOUR GUIDES BY AREA

Number of Tour Guides By Region 2017 (% Share)

Fig 7.1

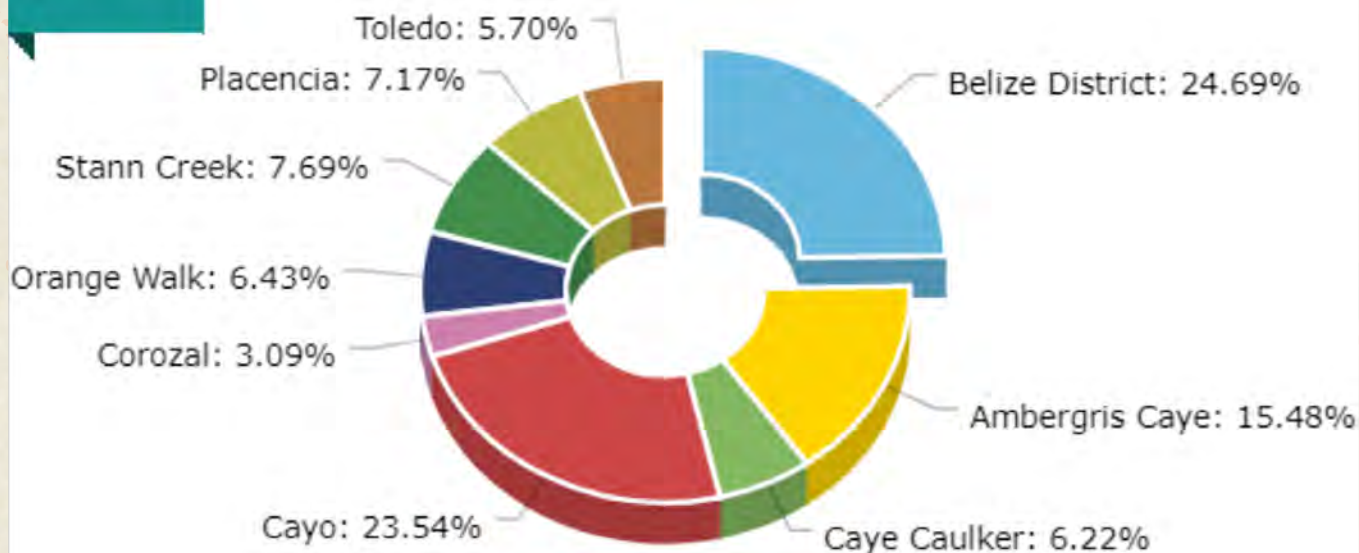
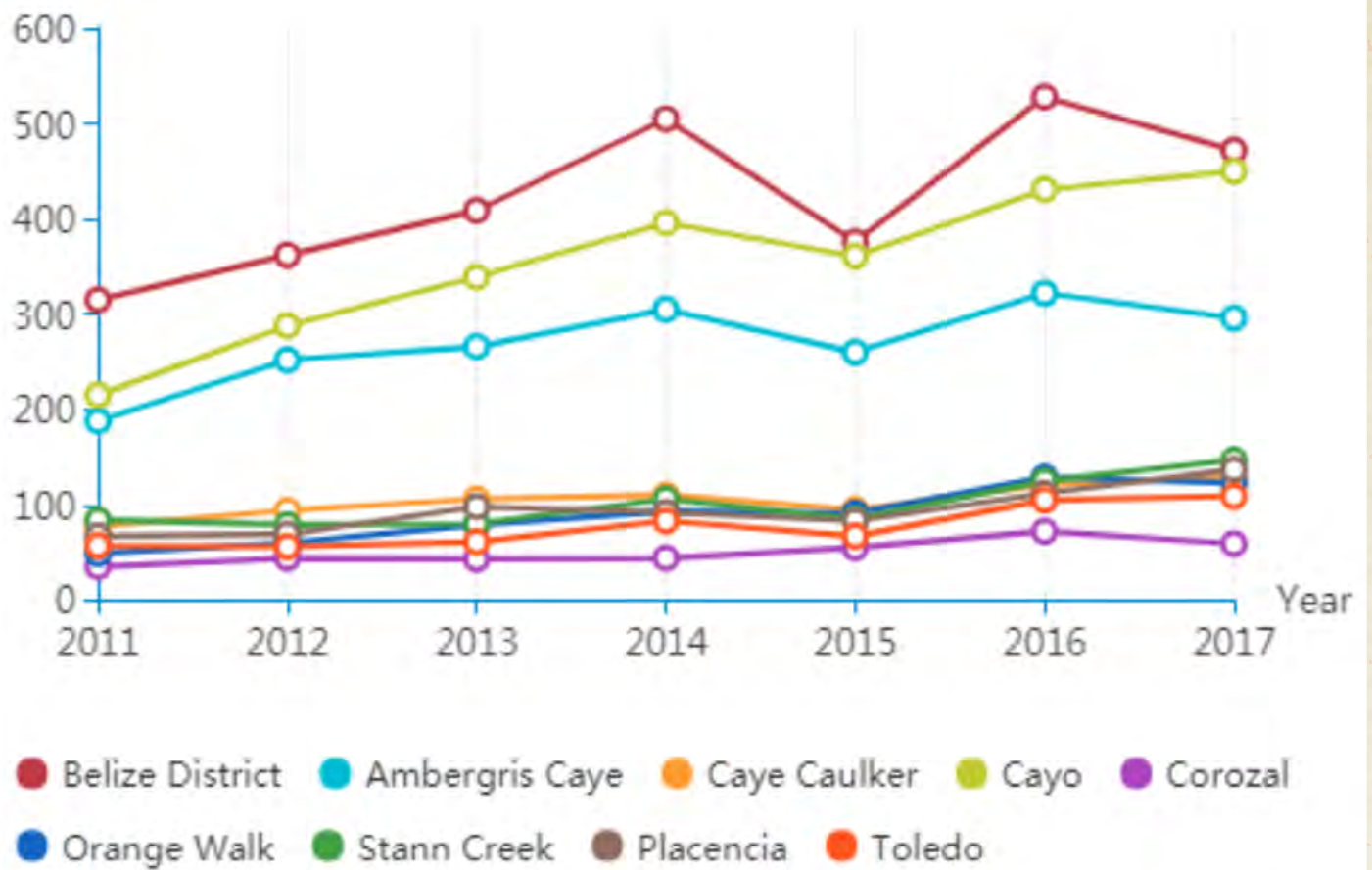


Fig 7.2

Number of Tour Guides By Area





	2011	2012	2013	2014	2015	2016	2017
Belize District	48	40	50	80	78	92	84
Ambergris Caye	48	40	32	57	59	68	57
Caye Caulker	19	23	24	32	40	40	37
Cayo	53	44	48	70	77	94	91
Corozal	2	3	5	7	5	6	5
Orange Walk	1	2	3	5	3	12	13
Stann Creek	18	26	14	30	31	38	37
Placencia	23	25	20	36	33	43	40
Toledo	12	12	13	15	13	16	17
TOTAL:	224	215	209	332	339	409	381
% Change:	11.00%	-4.00%	-2.80%	58.90%	2.11%	20.60%	-6.90%

NUMBER OF TOUR OPERATORS BY AREA

Number of Tour Operators By Region 2017 (% Share)

Fig 7.3

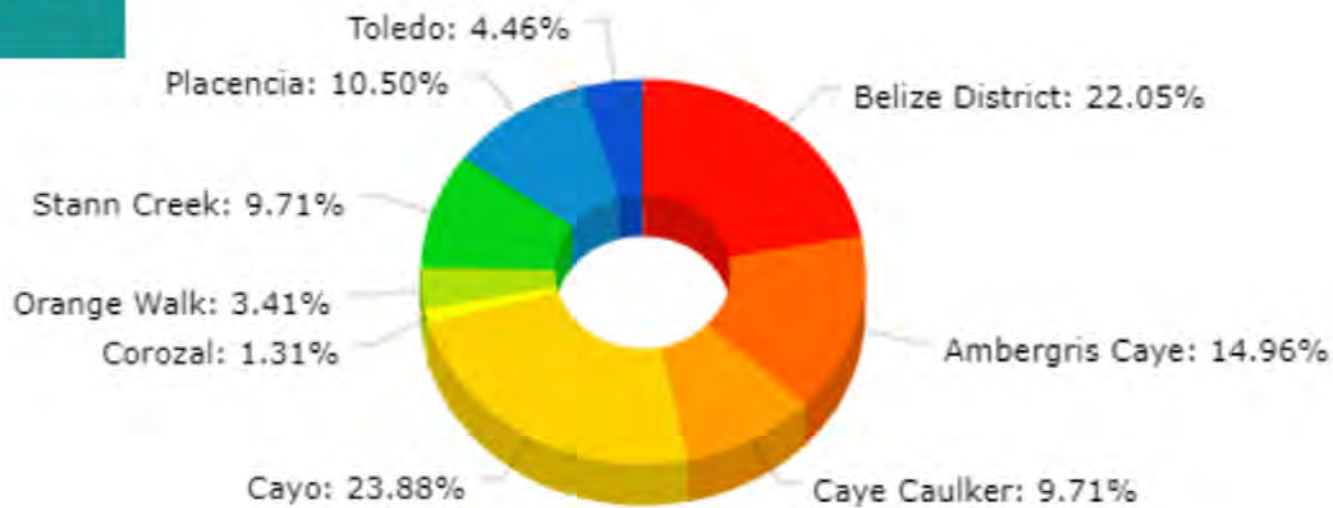
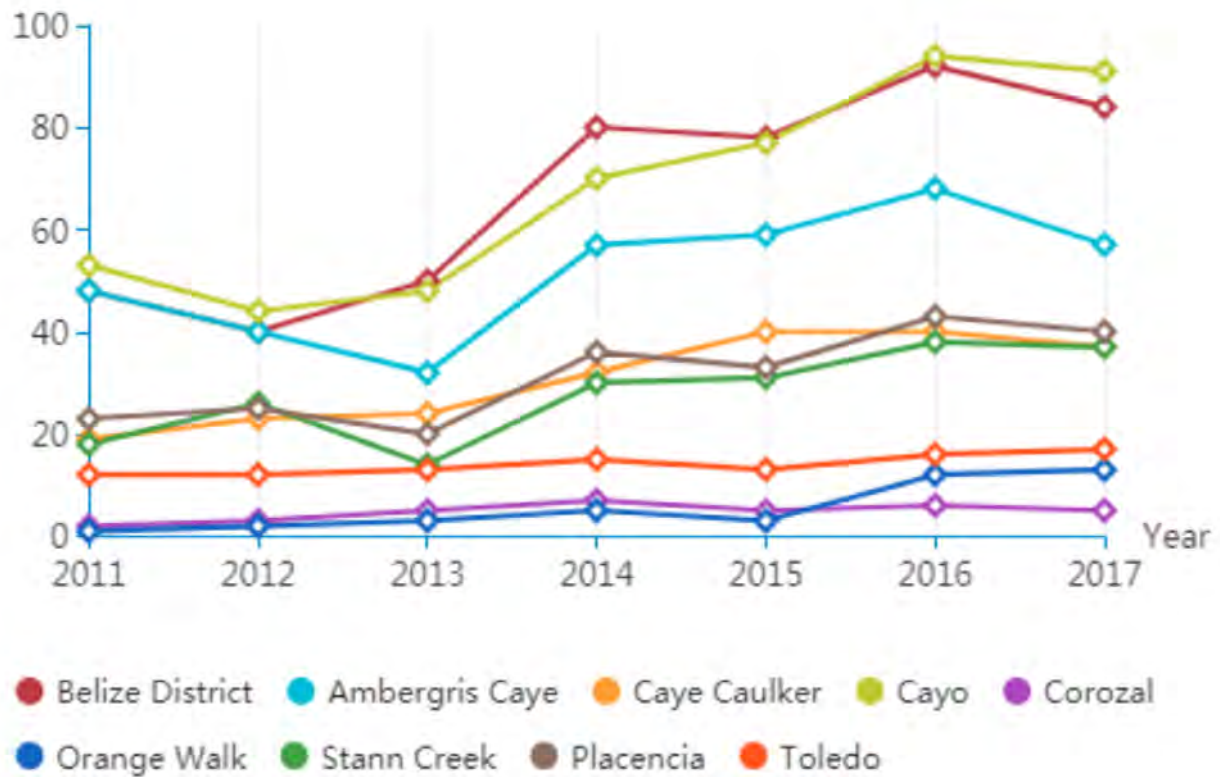


Fig 7.4

Number of Tour Operators By Area



Tourism Employment

The employment figures were received from the Belize Social Security Board. The figures include the number of persons registered by employment area and also those who work in specific areas related to tourism, such as air, water & land transport, hotels, culture and travel trade.

Approximately 20,186 persons were employed in the tourism sector in 2017 based on the results provided by the Social Security Board. The total number of employed persons in 2017 was 149,994. This means that approximately one in every eight persons in Belize is employed in the tourism industry.

The total number of Active Insured Persons shown is not equal to the sum of the Insured Persons in each industry during the respective years due to persons working in different industries throughout the year.



2016

belize

Table 7.3

	Belize	Cayo	Corozal	Orange Walk	Stann Creek	Toledo	Total
Accommodation for visitors	2,439	982	103	82	1,743	203	5,552
Food and beverage serving Activites	1,276	335	96	67	227	8	2,009
Road Passenger Transport	83	141	113	112	96	145	690
Water Passenger Transport	264	0	5	0	14	3	286
Air Passenger Transport	550	3	0	0	0	0	553
Transport Equipment Rental	234	6	3	0	17	0	260
Travel Agencies and Other Reservation Services Activities	889	129	11	8	183	61	1,281
Cultural Activities	114	302	2	0	147	6	571
Sports and Recreational Activities	147	54	165	1	29	0	396
TOTAL:	5,521	1,854	453	268	2,227	420	10,743

Male Insured Persons in Tourism by District



2016

belize

Table 7.4

	Belize	Cayo	Corozal	Orange Walk	Stann Creek	Toledo	Total
Accommodation for visitors	1,863	656	97	86	892	97	3,691
Food and beverage serving Activites	1,839	749	265	271	485	87	3,696
Road Passenger Transport	16	24	9	5	4	3	61
Water Passenger Transport	67	0	1	0	4	0	72
Air Passenger Transport	193	3	0	0	0	0	196
Transport Equipment Rental	73	2	1	1	6	0	83
Travel Agencies and Other Reservation Services Activities	441	65	2	5	91	31	635
Cultural Activities	92	86	3	0	41	0	222
Sports and Recreational Activities	234	79	178	9	18	0	518
TOTAL:	4,473	1,625	543	370	1,420	217	8,648

Female Insured Persons in Tourism by District



	Belize	Cayo	Corozal	Orange Walk	Stann Creek	Toledo	Total
Accommodation for visitors	4,302	1,638	200	168	2,635	300	9,243
Food and beverage serving Activities	3,115	1,084	361	338	712	95	5,705
Road Passenger Transport	99	165	122	117	100	148	751
Water Passenger Transport	331	0	6	0	18	3	358
Air Passenger Transport	743	6	0	0	0	0	749
Transport Equipment Rental	307	8	4	1	23	0	343
Travel Agencies and Other Reservation Services Activities	1,330	194	13	13	274	92	1,916
Cultural Activities	206	388	5	0	188	6	793
Sports and Recreational Activities	381	133	343	10	47	0	914
TOTAL:	9,994	3,479	996	638	3,647	637	19,391

Total Insured Persons in Tourism by District

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Employed Persons in Tourism By District - 2016

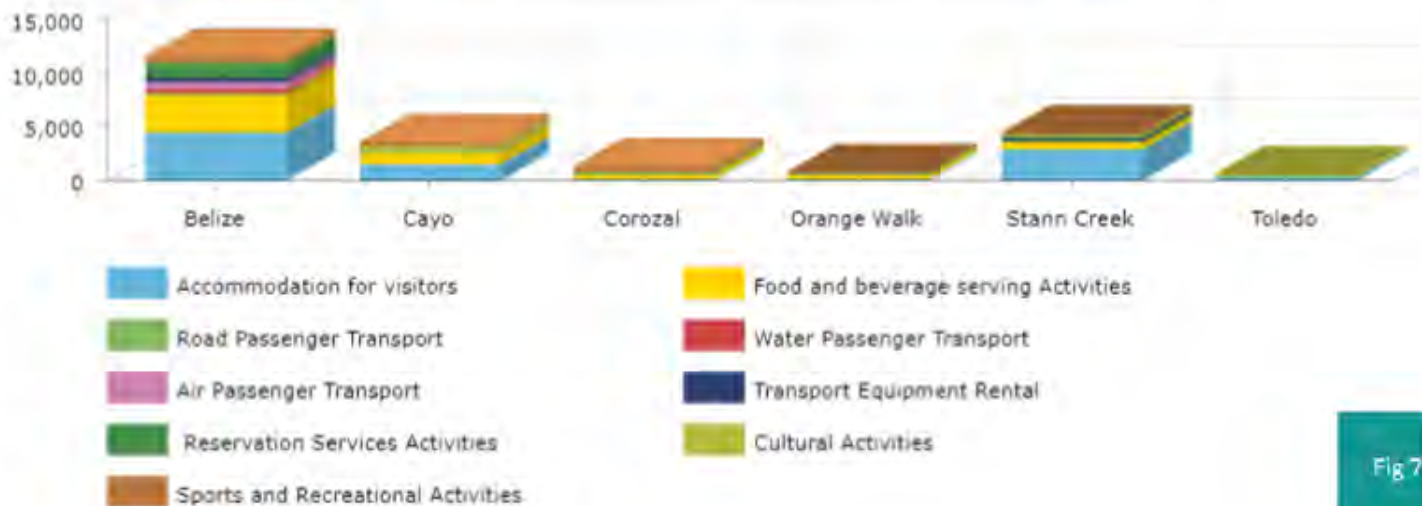


Fig 7.3



2017



Table 7.6

	Belize	Cayo	Corozal	Orange Walk	Stann Creek	Toledo	Total
Accommodation for visitors	2,543	972	99	96	1,902	183	5,795
Food and beverage serving Activites	1,568	329	88	61	227	17	2,290
Road Passenger Transport	97	134	97	119	92	140	679
Water Passenger Transport	263	0	4	0	16	3	286
Air Passenger Transport	565	3	0	0	0	0	568
Transport Equipment Rental	242	7	3	0	23	0	275
Travel Agencies and Other Reservation Services Activities	929	62	17	6	349	47	1,410
Cultural Activities	93	303	37	0	48	6	487
Sports and Recreational Activities	165	61	164	2	19	0	411
TOTAL:	5,955	1,781	472	275	2,480	387	11,350

Male Insured Persons in Tourism by District



2017




Table 7.7

	Belize	Cayo	Corozal	Orange Walk	Stann Creek	Toledo	Total
Accommodation for visitors	1,922	590	89	80	1,003	99	3,783
Food and beverage serving Activites	2,044	710	279	280	484	70	3,867
Road Passenger Transport	20	17	10	8	4	4	63
Water Passenger Transport	65	0	1	0	4	0	70
Air Passenger Transport	185	3	0	0	1	0	189
Transport Equipment Rental	79	1	1	1	2	0	84
Travel Agencies and Other Reservation Services Activities	478	34	8	7	102	26	655
Cultural Activities	79	89	20	0	32	1	221
Sports and Recreational Activities	254	74	163	11	17	0	519
TOTAL:	4,709	1,462	548	379	1,542	196	8,836

Female Insured Persons in Tourism by District

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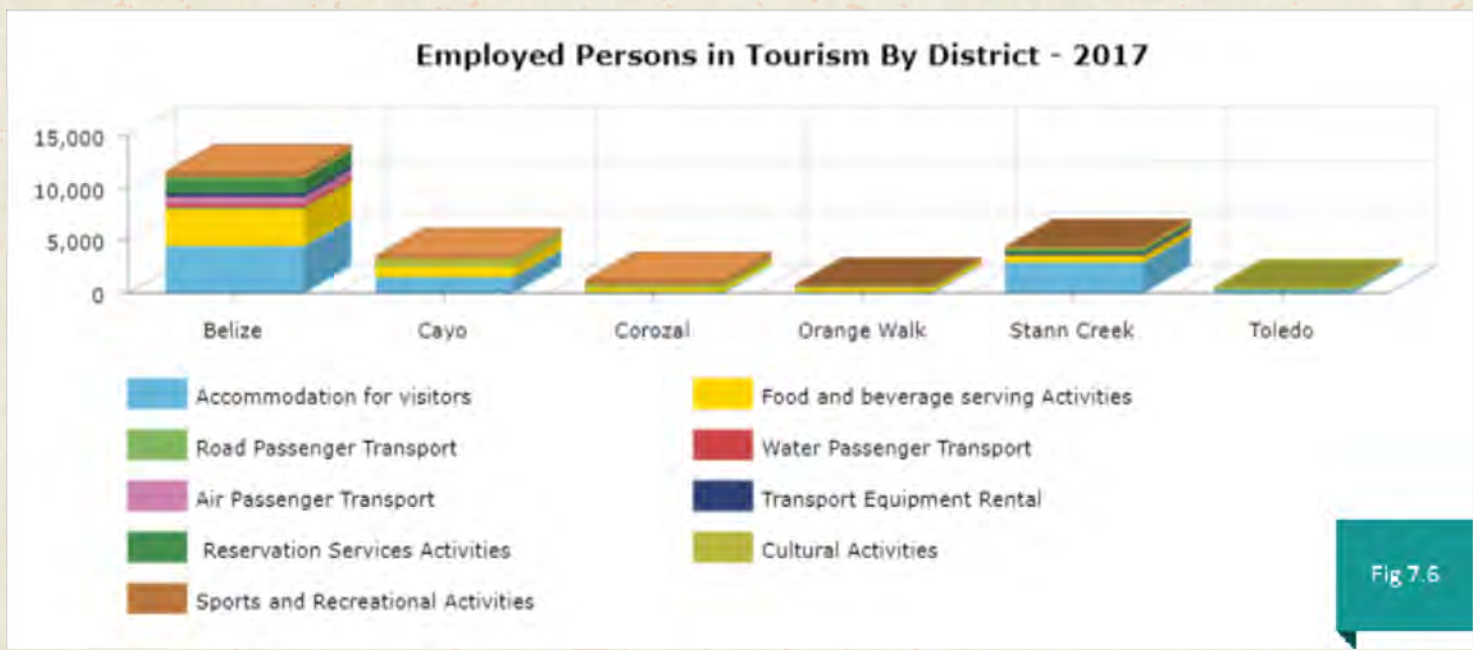


2017

Table 7.8

	Belize	Cayo	Corozal	Orange Walk	Stann Creek	Toledo	Total
Accommodation for visitors	4,465	1,562	188	176	2,905	282	9,578
Food and beverage serving Activities	3,612	1,039	367	341	711	87	6,157
Road Passenger Transport	117	151	107	127	96	144	742
Water Passenger Transport	328	0	5	0	20	3	356
Air Passenger Transport	750	6	0	0	1	0	757
Transport Equipment Rental	321	8	4	1	25	0	359
Travel Agencies and Other Reservation Services Activities	1,407	96	25	13	451	73	2,065
Cultural Activities	172	392	57	0	80	7	708
Sports and Recreational Activities	419	135	327	13	36	0	930
TOTAL:	10,664	3,243	1,020	654	4,022	583	20,186

Total Insured Persons in Tourism by District

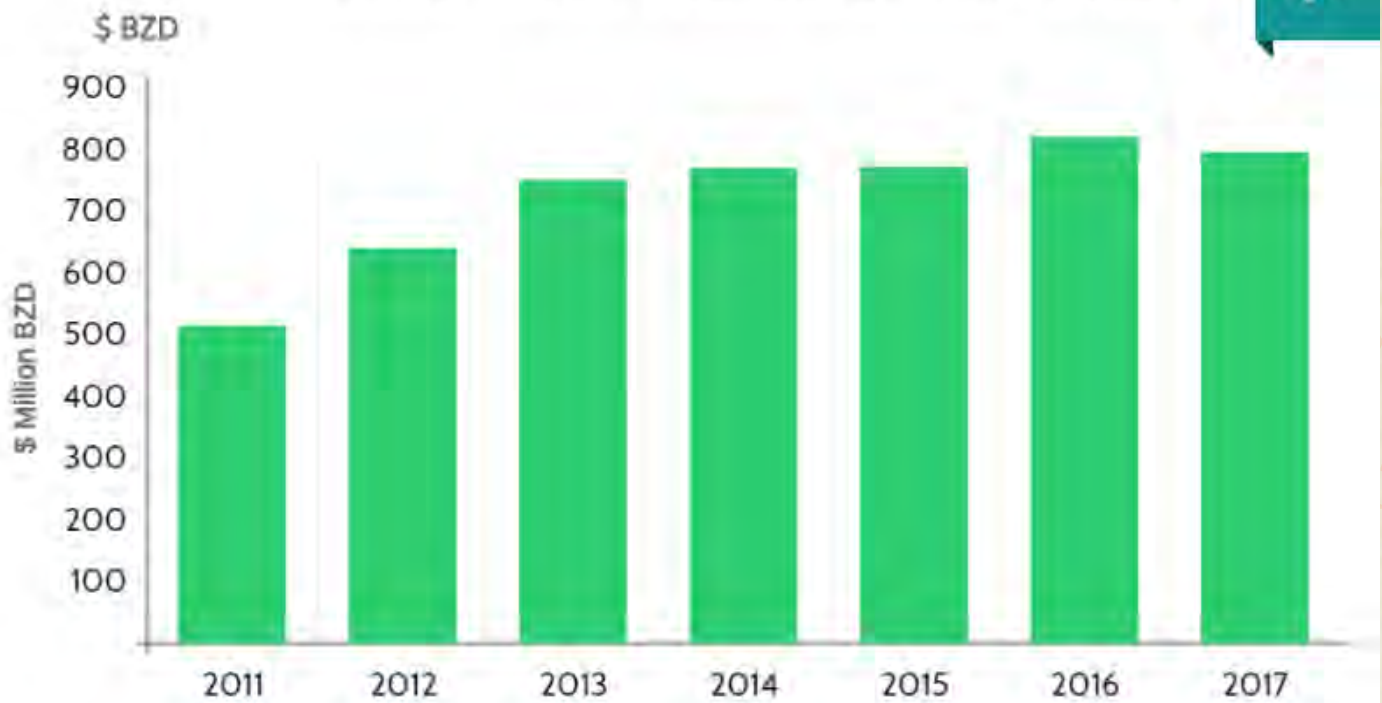


Tourism's Economic Impact

Tourism's impact extends far beyond airlines (international and local), hotels, tour operators, tour guides, restaurants, nightclubs and souvenir shops. In reality, tourism's impact extends to the entire economy. In other words, tourism has a direct, indirect, and an induced effect on the economy. Gross visitor expenditure represents the primary economic stimulus of tourism on the domestic economy. This expenditure produces a 'first round' or direct impact on the economy when it is spent by the visitor to purchase goods and services such as accommodation, meals, transportation and duty-free items. The companies and individuals who provide these goods and services must in turn purchase the necessary inputs in the domestic economy, in order to produce the output required by the visitor. Thus, the visitor expenditure stimulates a further indirect impact on other sectors of the economy through the purchase of inputs such as electricity, freight, transportation, farm produce and manufactured items. Employees of the companies producing these final outputs and inputs would receive wages and salaries and other income that they would spend in the domestic economy that would in turn generate further economic activity. Thus, the visitor expenditure has an induced impact on the economy through the expenditure of the wages and salaries. The tourism expenditure calculation is derived from key findings of the Visitor Expenditure, Motivation and Satisfaction (VEMS) Survey found in Section III of the Annual Travel and Tourism Statistical Digest. The average daily expenditure by type of overnight tourist visitor, as well as the average visitor length of stay, are derived from the results of the visitor survey and are then used in the calculation of the total overnight tourist expenditure figure. The Business Research and Economic Advisors (BREA) group conducts a comprehensive biennial survey of all the Caribbean cruise destinations, including Belize. From BREA's findings, the average daily expenditure of the cruise passengers who visited Belize is used in the estimate of the annual expenditure of the cruise visitors. The expenditure estimate of the overnight and the cruise visitors are taken together as the total estimated tourism expenditure for the year.

Annual Tourism Expenditure - million \$ (BZD)

Fig 7.7



Despite robust growth in overnight tourist arrivals in 2017, there was still a decrease in estimated annual tourism expenditure. This is due to contractions in both the average length of stay and the average daily expenditure in 2017 versus 2016, as measured in the annual visitor survey.

Annual Tourism Expenditure

Fig 7.8

Overnight & Cruise (% share)



Caribbean Tourism Organization Reports

“The Caribbean Tourism Organization (CTO), with headquarters in Barbados and offices in New York and London, is the Caribbean’s tourism development agency comprising membership of over 30 countries and territories including Dutch, English, French, and Spanish, as well as a myriad of private sector allied members. The primary objective of the Caribbean Tourism Organization is to provide to and through its members, the services and information necessary for the development of sustainable tourism for the economic and social benefit of the Caribbean people . . .” (About CTO. (n.d.). Retrieved from <http://www.onecaribbean.org/about-cto/>)

The CTO collects monthly arrival data from its various member countries. This data provides a robust picture of tourism development in the Caribbean region, and helps to highlight fluctuations in travel patterns. Some of the reports from the CTO can be seen below.

The growth of annual tourist arrivals in each CTO member country is difficult to compare because the numbers vary greatly in magnitude depending on the destination country. However percentage increases year over year gives a reasonable indication of the progress being made in any one destination country versus another. Belize had the second highest percentage growth in overnight tourist arrivals out of all the reporting members of the CTO countries in 2017. St. Lucia had an 11% annual increase and Belize had a 10.8% annual increase in overnight arrivals. It should be noted that some of the Caribbean islands were devastated by major hurricanes in 2017, and this could have negatively impacted tourism flows to some of these affected regions.

Table 7.9

Destination	Period	Tourist Arrivals	Percent Change		
			Annual	Winter	Summer
Anguilla	Jan-Dec	68,254	-13.9	5.5	-27.2
Antigua & Barbuda	Jan-Dec	247,320	-6.7	-5.0	-7.9
Aruba	Jan-Dec	1,070,548	-2.9	-11.9	2.5
Barbados ^P	Jan-Dec	661,160	4.7	7.7	2.9
Belize	Jan-Dec	427,111	10.8	7.2	13.1
Bermuda*	Jan-Dec	269,576	10.3	13.2	9.5
British Virgin Islands	Jan-Dec	334,630	-17.9	0.0	-30.9
Cayman Islands	Jan-Dec	418,403	8.5	1.9	12.7
Curaçao	Jan-Dec	397,886	-9.8	-12.6	-8.2
Dominica ^P	Jan-Sep	60,855	7.9	16.3	1.5
Dominican Republic *	Jan-Dec	6,187,542	3.8	6.4	2.4
Grenada	Jan-Dec	146,375	8.1	1.5	11.9
Guyana	Jan-Dec	247,309	5.1	16.0	0.8
Jamaica	Jan-Dec	2,352,915	7.8	2.3	10.9
Martinique	Jan-Dec	535,646	3.1	3.5	2.9
Puerto Rico **	Jan-Dec	1,598,559	-10.7	-1.6	-16.2
Saint Lucia	Jan-Dec	386,127	11.0	5.7	14.0
St. Maarten	Jan-Jul	338,933	-0.3	-2.2	3.3
St. Vincent & the Grenadines	Jan-Dec	75,972	-3.5	-6.2	-2.0
Suriname ***	Jan-Dec	278,035	8.2	13.5	6.1
Trinidad & Tobago ***	Jan-Dec	394,650	-3.5	-3.1	-3.7
Turks & Caicos Islands	Jan-Dec	416,434	-8.2	-0.2	-13.8
U S Virgin Islands	Jan-Nov	612,702	-14.3	4.9	-28.4

* Non-Resident Air Arrivals

** Non-Resident Hotel registrations only

*** Air Arrivals by Nationality

P = Preliminary figures

Winter – Jan to Apr

Summer – May to Dec

^ Excludes data from Vance M. Amory Int'l Airport in Nevis

N.B: Figures are subject to revision by reporting countries

SOURCE - Data supplied by member countries and available as at March 29, 2018

Caribbean Tourist (Stop-over) Arrivals in 2017

Table 7.10

Destination	Period	United States		Canada		Europe		Other	
		Tourists	%ch	Tourists	%ch	Tourists	%ch	Tourists	%ch
Anguilla	Jan-Dec	43,327	-14.2	2,819	-19.5	8,437	-5.0	13,671	-16.4
Antigua & Barbuda *	Jan-Dec	96,347	-11.3	22,932	8.2	90,414	-5.8	37,627	-4.5
Aruba	Jan-Dec	695,718	10.6	47,166	12.1	90,871	4.8	236,793	-31.2
Barbados ^P	Jan-Dec	188,460	11.6	85,047	7.8	257,643	-0.3	130,010	3.8
Belize	Jan-Dec	276,566	8.7	26,086	19.3	50,121	17.6	74,338	11.7
Bermuda *	Jan-Dec	198,259	8.4	27,416	15.5	32,349	11.6	11,552	30.3
Cayman Islands	Jan-Dec	340,955	13.4	24,757	6.4	24,252	-17.0	28,439	-12.2
Curaçao	Jan-Dec	60,939	2.2	19,106	6.2	205,133	-1.1	112,708	-27.8
Dominica ^P	Jan-Sep	14,712	-0.8	2,444	9.7	13,474	25.7	30,225	5.7
Dominican Republic *	Jan-Dec	2,073,963	-0.5	827,721	7.7	1,431,459	13.5	1,854,399	0.6
Grenada	Jan-Dec	67,250	16.1	14,580	5.6	33,219	-3.4	31,326	7.2
Guyana	Jan-Dec	82,613	-8.8	24,070	0.2	11,231	-9.9	129,395	19.5
Jamaica	Jan-Dec	1,509,963	7.4	405,174	8.9	325,804	10.6	111,974	2.9
Puerto Rico **	Jan-Dec	1,410,772	-11.5	15,089	-26.8	28,493	-35.9	144,205	9.5
Saint Lucia	Jan-Dec	168,223	6.8	42,578	12.7	92,611	15.5	82,715	14.3
St. Maarten	Jan-Jul	--	219,115	--	-1.5	89,160	3.4	30,658	-1.4
St. Vincent & the G'dines	Jan-Dec	23,320	2.1	8,690	8.5	16,674	-22.0	27,288	3.0
Suriname	Jan-Dec	6,827	-11.8	2,180	-26.7	162,567	51.9	106,461	-23.5
Trinidad & Tobago ***	Jan-Dec	169,690	-2.6	52,355	4.7	55,416	-8.3	117,189	-5.6
Turks & Caicos Islands	Jan-Jun	208,753	-1.6	25,812	-6.7	6,265	-4.4	14,207	12.7
U S Virgin Islands **	Jan-Jun	384,924	-3.0	3,640	10.9	14,699	13.1	25,407	23.5

* Non-Resident Air Arrivals

** Non-Resident Hotel registrations only

*** Air Arrivals by Nationality

1 USA total included in Other P Preliminary figures ^ Excludes data from Vance M. Amory Int'l Airport in Nevis

N.B: U.S.V.I reported figures in this tables are Hotel Registrations whereas they reported Stay Over totals are Air Arrivals. Figures are subject to revision by reporting countries

SOURCE - Data supplied by member countries and available as at March 29, 2018

Caribbean Tourist Arrivals in 2017 By Main Market

Destination

Cruise Passenger Arrivals - 2017 & 2016

	Period	2017	2016	% change
Antigua & Barbuda	Jan-Dec	792,861	608,503	30.3
Aruba	Jan-Dec	792,403	656,043	20.8
Bahamas	Jan-Dec	4,626,259	4,690,374	-1.4
Barbados	Jan-Dec	681,211	594,096	14.7
Belize	Jan-Dec	1,014,232	1,005,394	0.9
Bermuda	Jan-Dec	418,049	397,904	5.1
British Virgin Islands	Jan-Oct	397,608	521,121	-23.7
Cayman Islands	Jan-Dec	1,728,444	1,711,849	1.0
Cozumel (Mexico)	Jan-Dec	4,103,787	3,637,321	12.8
Curaçao	Jan-Dec	635,006	469,498	35.3
Dominica	Jan-Sep	156,026	169,054	-7.7
Dominican Republic	Jan-Dec	1,107,951	809,286	36.9
Grenada	Jan-Dec	299,449	314,912	-4.9
Jamaica	Jan-Dec	1,923,274	1,655,562	16.2
Martinique	Jan-Dec	405,553	276,056	46.9
Puerto Rico	Jan-Dec	1,226,899	1,401,866	-12.5
Saint Lucia	Jan-Dec	668,006	587,953	13.6
St. Kitts & Nevis	Jan-Aug	701,675	616,302	-2.2
St. Maarten	Jan-Dec	1,237,760	1,668,863	-6.2
St. Vincent & the Grenadines	Jan-Dec	174,236	99,542	13.5
Trinidad & Tobago	Jan-Dec	68,403	83,049	-3.1
Turks & Caicos Islands	Jan-Dec	827,409	846,963	-0.2
U S Virgin Islands	Jan-Dec	1,304,303	1,776,685	4.9

N.B: Figures are subject to revision by reporting countries

P = Preliminary

SOURCE - Data supplied by member countries and available as at March 29, 2018