



BELIZE TOURISM BOARD

Belize Travel Et Tourism Statistics Digest 2015



FOREWORD

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 gives a more detailed snapshot of the profile of the overnight visitor.

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 selected 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 and global tourism indicators.

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The Belize Travel & Tourism Statistic Digest

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)
- United Nations World Tourism Organization (UNWTO)

INTRODUCTION	7
IMPORTANT DEFINITIONS IN TOURISM	7
Figure 0.1 Categories of Arrivals into Belize	8
SECTION I: REPORTS ON BELIZE'S OVERNIGHT TOURISM SECTOR	9
Table I.1 Total Overnight Tourist Arrivals by Month	10
Table I.2 Total Overnight Tourist Arrivals by Quarter	10
Table I.3 Total Overnight Tourist Arrivals by Season	11
Figure I.1 Total Overnight Tourist Arrivals by Month	11
Table I.4 Total Overnight Tourist Arrivals by Purpose	11
Table I.5 Total Overnight Tourist Arrivals by Port of Entry	12
Figure I.2 Total Overnight Tourist Arrivals by Entry Port	12
Table I.6 Overnight Tourist Visitors to Belize by Country/Region of Origin	13
Figure I.3 Total Overnight Tourist Arrivals by Country/ Region of Origin	13
Table I.7 Overnight Tourist Visitors to Belize by Country/Region of Origin – Market Share	14
Table I.8 American Overnight Tourist Visitors to Belize by Month	14
Figure I.4 American Overnight Tourist Visitors to Belize by Month	15
Table I.9 European Overnight Tourist Visitors to Belize by Country of Origin	16
Figure I.5 European Overnight Tourist Arrivals by Percent Share	16
Table I.10 European Overnight Tourist Visitors to Belize by Month	17
Figure I.6 European Overnight Tourist Arrivals by Month	17
Table I.11 Canadian Overnight Tourist Visitors to Belize by Month	18
Figure I.7 Canadian Overnight Arrivals by Month	18
Table I.12 Latin American Overnight Visitors by Month	19
Figure I.8 Latin American Overnight Arrivals by Month	19
Table I.13 Total Overnight Tourist Arrivals at Philip Goldson International Airport (PGIA) by Month	20
Figure I.9 Airport Tourist Arrivals by Month	21
Table I.14 Total Overnight Tourist Arrivals at Philip Goldson International Airport (PGIA) by Quarter	21
Table I.15 Total Overnight Tourist Arrivals at Philip Goldson International Airport (PGIA) by Season	21
SECTION II: REPORTS FROM THE CTO'S MANAGEMENT INFORMATION SYSTEM FOR TOURISM	22
Figure 2.1 MIST Network Infrastructure Diagram	23
Figure 2.2 Belize Immigration & Nationality Department's E/D Arrival Form	24
Figure 2.3 Management Information System for Tourism (MIST) Data Entry User Interface	25
Table 2.1 Tourist Air Arrivals by U.S. Origin State	26
Table 2.2 Tourist Air Arrivals by Canadian Origin Province	27
Table 2.3 Tourist Air Arrivals by European Origin Country	27
Table 2.4 Tourist Air Arrivals by Purpose by Airline Carrier 2013	27
Table 2.5 Tourist Air Arrivals by Purpose by Airline Carrier 2014	28
Table 2.6 Tourist Air Arrivals by Purpose by Airline Carrier 2015	28
Table 2.7 Tourist Air Arrivals by Sex by Occupation 2013	29
Table 2.8 Tourist Air Arrivals by Sex by Occupation 2014	29
Table 2.9 Tourist Air Arrivals by Sex by Occupation 2015	30
Table 2.10 Tourist Air Arrivals by Sex by Age 2013	30
Table 2.11 Tourist Air Arrivals by Sex by Age 2014	30
Table 2.12 Tourist Air Arrivals by Sex by Age 2015	31
Table 2.13 Tourist Air Arrivals by Origin Region/Country	31
Table 2.14 Tourist Air Arrivals by Purpose of Visit by Accommodation Type 2013	31
Table 2.15 Tourist Air Arrivals by Purpose of Visit by Accommodation Type 2014	32

Table 2.16	Tourist Air Arrivals by Purpose of Visit by Accommodation Type 2015	33
Table 2.17	Tourist Air Arrivals by Visitor Type by Airline Carrier 2013	34
Table 2.18	Tourist Air Arrivals by Visitor Type by Airline Carrier 2014	35
Table 2.19	Tourist Air Arrivals by Visitor Type by Airline Carrier 2015	36



SECTION III: VISITOR EXPENDITURE, MOTIVATION & SATISFACTION (VEMS) SURVEY STATISTICS 37

Table 3.1	Surveys Completed by Border Station	38
Table 3.2	Mode of Arrival on this Trip	38
Table 3.3	Surveys Collected by Port of Entry by Month	39
Table 3.4	Overnight Visitors by Country/Region of Origin	39
Table 3.5	Overnight Visitors by U.S. State	40
Table 3.6	Overnight Visitors by European Country	41
Table 3.7	Overnight Visitors by Canadian Province	41
Table 3.8	Overnight Visitors by Purpose of Visit, by Country/Region of Origin	42
Table 3.9	Average Length of Stay (Nights) by Country of Residence and Season	42
Table 3.10	Average Length of Stay (Nights) by Purpose of Visit and Season	42
Table 3.11	Sex by Age Group of Respondents	43
Table 3.12	Overnight Visitors by Travel Companion(s) by Country/Region of Origin	43
Table 3.13	% Overnight Visitors by Country/Region of Origin by Type of Accommodation	44
Table 3.14	Overnight Visitors by Country/Region of Origin by Area Stayed in Country	44
Table 3.15	Rating of Sources of Information about Belize	45
Table 3.16	% Overnight Visitors by First Time Visiting	45
Table 3.17	Mode of Arrival for Repeat Visitors	46
Table 3.18	Multiple Destinations Visited by Country/Region of Origin	46
Table 3.19	Participation in Activities by Country/Region of Origin (%)	46
Table 3.20	Participation in Activities by Top 10 U.S. States (%)	47
Table 3.21	Places of Interest Visited by Country/Region of Origin (%)	47
Table 3.22	Prepaid vs. Non-prepaid Package by Country Region of Origin (US\$)	48
Table 3.23	Prepaid Package Cost by Components (%)	48
Table 3.24	Prepaid Package Cost by Country/Region of Origin and Seasons (US\$)	48
Table 3.25	Prepaid Package Costs – Visited Multiple Destinations (US\$)	49
Table 3.26	Average Daily Expenditure (US\$) by Country	49
Table 3.27	Average Daily Expenditure (US\$) by Purpose of Visit	49
Table 3.28	Average Daily Expenditure (US\$) by Country/Region of Origin and Purpose of Visit	49
Table 3.29	Average Daily Expenditure (US\$) by Purpose of Visit by Places Stayed	50
Table 3.30	Average Daily Expenditure (US\$) by Country/Region of Origin by Places Stayed	50
Table 3.31	Satisfaction Ratings of Different Aspects of Trip	51
Table 3.32	Visitor Satisfaction Rating – Return /Recommend	51



SECTION IV: REPORTS ON BELIZE'S CRUISE SECTOR 52

Table 4.1	Cruise Visitor Arrivals by Month	53
Figure 4.1	Cruise Passenger Arrivals by Month	54
Table 4.2	Cruise Visitor Arrivals by Quarter	54
Table 4.3	Cruise Visitor Arrivals by Season	54
Table 4.4	Cruise Passengers to Belize by Major Cruise Lines	55
Figure 4.2	Cruise Passengers to Belize by Major Cruise Lines	55
Table 4.5	Cruise Ship Calls to Belize by Major Cruise Lines	56
Figure 4.3	Cruise Ship Calls to Belize by Major Cruise Lines	56
Figure 4.4	% Cruise Passengers Tours in Belize 2014	57

Figure 4.5	% Cruise Passengers Tours in Belize 2015	58
Figure 4.6	Origin Regions of Visitors on Marine Vessels 2014	58
Figure 4.7	Origin Regions of Visitors on Marine Vessels 2015	59



SECTION V: REPORTS ON VISITS TO BELIZE'S PROTECTED AREAS & ARCHAEOLOGICAL SITES 60

Table 5.1	Annual Visitors to the Museum of Belize	61
Figure 5.1	Annual Visitors to the Museum of Belize	61
Figure 5.2	Types of Visitors to Archaeological Sites	62
Figure 5.3	Percentage of Visitors to Archaeological Sites 2015	62
Table 5.2	Monthly Visitors to the Major Archaeological Sites	63
Figure 5.4	Monthly Visitors to the Major Archaeological Sites	64
Table 5.3	Annual Visitors to the Major Archaeological Sites	64
Figure 5.5	Annual Visitors to the Major Archaeological Sites	65
Figure 5.6	Hol Chan & Shark Ray Alley	65
Table 5.4	Annual Visitors to the Hol Chan Marine Reserve	66
Figure 5.7	Monthly Visitors to the Hol Chan Marine Reserve	67
Table 5.5	Divers and Snorkelers to the Hol Chan Marine Reserve	67
Figure 5.8	Divers and Snorkelers to the Hol Chan Marine Reserve	68
Table 5.6	Foreigners and Belizeans to the Hol Chan Marine Reserve	68
Figure 5.9	Foreigners and Belizeans to the Hol Chan Marine Reserve	69
Protected Areas Managed by the Belize Audubon Society		69
Table 5.7	Annual Visitors to the BAS Protected Area Sites	69
Figure 5.10	Annual Visitors to the BAS Protected Area Sites	70
Figure 5.11	Caves Branch Kayaking	70
Table 5.8	Arrivals to Cave Branch by Visitor Type 2014	71
Table 5.9	Arrivals to Cave Branch by Visitor type 2015	71



SECTION VI: REPORTS ON BELIZE'S ACCOMMODATION SECTOR 72

Table 6.1	Number of Hotels by Area	73
Figure 6.1	Number of Hotels by Area	74
Table 6.2	Number of Rooms by Area	74
Figure 6.2	Number of Rooms by Area	75
Table 6.3	Number of Beds by Area	75
Figure 6.3	Number of Beds by Area	76
Table 6.4	Number of Hotels by Room Size by Area	76
Table 6.5	Hotel Occupancy by Area 2011	77
Table 6.6	Hotel Occupancy by Area 2012	77
Table 6.7	Hotel Occupancy by Area 2013	78
Table 6.8	Hotel Occupancy by Area 2014	78
Table 6.9	Hotel Occupancy by Area 2015	79
Figure 6.4	Hotel Occupancy by Area/Region 2015	79
Table 6.10	Hotel Occupancy by Month: 2006 - 2015	80
Figure 6.5	Hotel Occupancy by Month: 2006 - 2015	80
Table 6.11	Average Daily Room Rate by Area (\$BZ)	81
Figure 6.6	Average Daily Room Rate by Area (\$BZ)	81
Table 6.12	Average Daily Room Rate by Month (\$BZ)	82
Figure 6.7	Average Daily Room Rate by Month (\$BZ)	82
Table 6.13	Revenue per Available Room -RevPAR (\$BZ) by Area 2014	83
Table 6.14	Revenue per Available Room -RevPAR (\$BZ) by Area 2015	83

Table 6.15	Annual Revenue Generated by Area (Percent Share) %	84
Figure 6.8	Annual Revenue Generated by Area (Percent Share) %	84
Table 6.16	Revenue Generated by Month (Percent Share) %	85
Figure 6.9	Revenue Generated by Month (Percent Share) %	85
Table 6.17	Revenue Generated by Quarter (percent share) %	86
Table 6.18	Persons Employed in the Accommodation Sector by Gender	86
Figure 6.11	Persons Employed in the Accommodation Sector by Gender	87



SECTION VII: TOURISM, ECONOMIC, REGIONAL & GLOBAL REPORTS 88

Table 7.1	Number of Tour Guides by Area	89
Figure 7.1	Tour Guides by Area (%)	89
Table 7.2	Number of Tour Operators by Area	90
Figure 7.2	Tour Operators by Area (%)	90
Table 7.3	Active Insured Persons by Sex, District, and Selected Industry 2014	91
Table 7.4	Active Insured Persons by Sex, District, and Selected Industry 2015	92
	Tourism's Economic Impact	92
	Annual Tourism Expenditure	93
Figure 7.3	Tourism Expenditure: Overnight & Cruise (% Share)	93
Figure 7.4	Total Estimated Tourism Expenditure: Overnight & Cruise (millions \$BZ)	93
	Caribbean Tourism Organization Reports	94
Table 7.5	Stay-Over Arrivals Caribbean 2015	95
Table 7.6	Stay Over Arrivals Caribbean by Main Origin Market Country	96
Table 7.7	Cruise Passenger Arrivals Caribbean	97
	United Nations World Tourism Organization Reports	98
Figure 7.5	World Annual Inbound Tourism International Arrivals	98
Figure 7.6	World Inbound Tourism International Arrivals	99
Figure 7.8	World Inbound Tourism International Arrivals	99
Figure 7.9	World Inbound Tourism International Arrivals	100
Table 7.8	Outlook for (Global) International Tourist Arrivals - UNWTO	100

INTRODUCTION

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:

IMPORTANT DEFINITIONS IN TOURISM

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.

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.

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 flows of travelers and visitors and for the credibility of tourism statistics.

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

IRTS 2008 (para 2.21-2.28):

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).

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

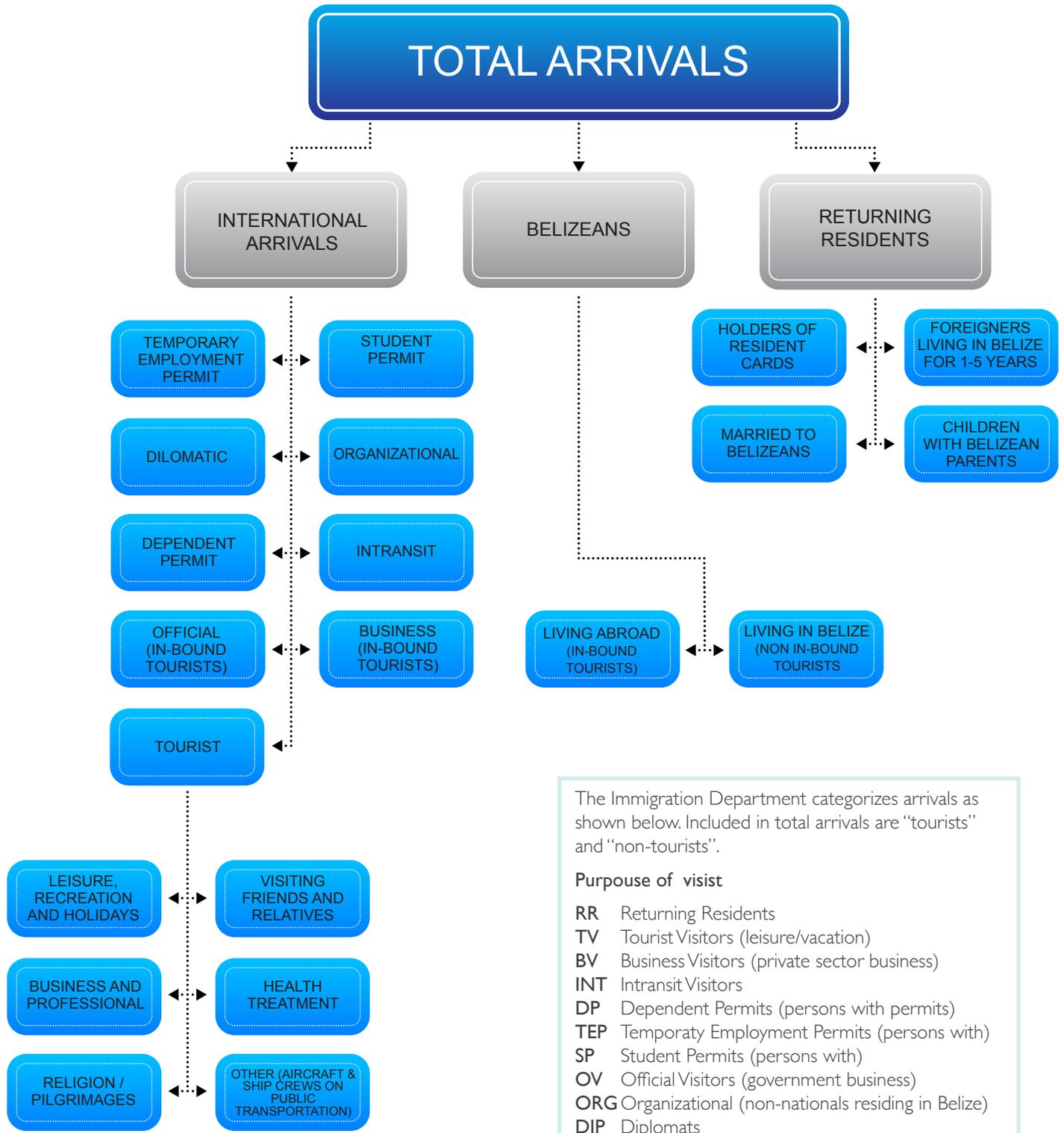
Tourist (or overnight visitor): A visitor (domestic, inbound or outbound) is classified as a tourist (or overnight visitor), if his/her trip includes an overnight stay.

Business visitor: A business visitor is a visitor whose main purpose for a tourism trip corresponds to the business and professional category

VFRs: Visits to friends and relatives (VFR) are so-called social visits. They are usually undertaken for relaxation, and they are often seen as a sub-category of leisure, recreation and holidays.

The UNWTO's definition refers to the motive of the visit, and not to the mode of accommodation. In the classification by purpose they constitute a sub-category of leisure trips.

FIGURE 0.1 CATEGORIES OF ARRIVALS INTO BELIZE



The Immigration Department categorizes arrivals as shown below. Included in total arrivals are “tourists” and “non-tourists”.

Purpose of visit

- RR Returning Residents
- TV Tourist Visitors (leisure/vacation)
- BV Business Visitors (private sector business)
- INT Intransit Visitors
- DP Dependent Permits (persons with permits)
- TEP Temporaty Employment Permits (persons with)
- SP Student Permits (persons with)
- OV Official Visitors (government business)
- ORG Organizational (non-nationals residing in Belize)
- DIP Diplomats



*Reports on Belize's
Overnight Tourism
Sector*



SECTION I

REPORTS ON BELIZE'S
OVERNIGHT TOURISM SECTOR

The success of Belize's tourism industry over the course of a year continues to be primarily as a result of the continued growth of the overnight sector. In the first half of 2015, monthly overnight tourism arrivals had decreased during four of the six months. Naturally, these decreases were a cause for concern within the industry which



had enjoyed a steady growth in arrivals during the previous three years. However, in the second half of 2015, there was a turnaround which indicated that the growth in overnight arrivals was back on track. Consequently, the year culminated with a particularly strong overnight tourist arrivals performance.

TABLE I.1 TOTAL OVERNIGHT TOURIST ARRIVALS BY MONTH

MONTH	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	%Change '14 vs '15
January	22,264	21,534	23,130	22,580	22,401	23,592	24,263	28,431	31,164	30,858	-0.98
February	24,278	25,618	25,803	22,600	23,768	23,854	25,778	28,765	32,105	31,753	-1.1
March	29,415	31,267	30,799	26,499	29,709	28,643	32,240	35,795	38,712	39,136	1.09
April	23,888	23,595	21,361	22,210	19,683	23,585	23,699	23,555	28,969	27,569	-4.83
May	19,898	19,938	20,209	17,855	19,473	19,289	22,106	22,941	26,319	24,707	-6.12
June	21,572	22,409	22,261	20,118	21,328	21,755	24,615	26,817	28,727	29,187	1.6
July	22,024	22,710	22,146	21,291	23,442	24,042	25,778	27,833	29,983	30,967	3.28
August	18,498	18,112	18,655	17,461	18,431	17,735	19,528	20,863	22,672	23,874	5.3
September	11,626	11,079	8,957	9,994	9,251	9,823	11,743	10,654	11,943	14,242	19.25
October	10,883	12,292	11,129	11,547	11,931	12,093	14,498	14,543	15,511	18,945	22.14
November	18,079	18,911	17,170	15,927	17,451	18,908	21,542	22,868	22,488	29,909	33
December	24,883	23,958	23,388	24,165	25,051	26,945	31,346	31,111	32,624	39,977	22.54
TOTAL	247,309	251,422	245,007	232,249	241,919	250,263	277,135	294,177	321,220	341,125	6.2

TABLE I.2 TOTAL OVERNIGHT TOURIST ARRIVALS BY QUARTER

Quarter	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	%Change '14 VS '15
1st Quarter	75,957	78,420	79,732	71,680	75,878	76,089	82,282	92,992	101,982	101,746	-0.23
2nd Quarter	65,359	65,942	63,830	60,183	60,484	64,628	70,419	73,313	84,016	81,464	-3.04
3rd Quarter	52,149	51,900	49,758	48,747	51,124	51,600	57,049	59,350	64,598	69,083	6.94
4th Quarter	53,845	55,161	51,687	51,639	54,433	57,946	67,385	68,522	70,624	88,831	25.78
Total	247,309	251,422	245,007	232,249	241,919	250,263	277,135	294,177	321,220	341,125	6.2

REPORTS ON BELIZE'S OVERNIGHT TOURISM SECTOR

In Belize, “season” refers to the time period between respective months and is not completely related to climate. The ‘winter’ season occurs from January to April, and the remainder of the year is the summer season. The ‘winter’ season corresponds heavily with the tourism high season, which is from around mid-November to March of the following year.

TABLE I.3 TOTAL OVERNIGHT TOURIST ARRIVALS BY SEASON

Season	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	%Change '14 vs '15
Winter	99,845	102,014	101,092	93,890	95,562	99,673	105,981	116,547	130,952	129,316	-1.2
Summer	147,463	149,407	143,915	138,358	146,358	150,590	171,154	177,630	190,268	211,809	113
Total	247,309	251,422	245,007	232,249	241,919	250,263	277,135	294,177	321,220	341,125	6.2

FIGURE I.1 TOTAL OVERNIGHT TOURIST ARRIVALS BY MONTH

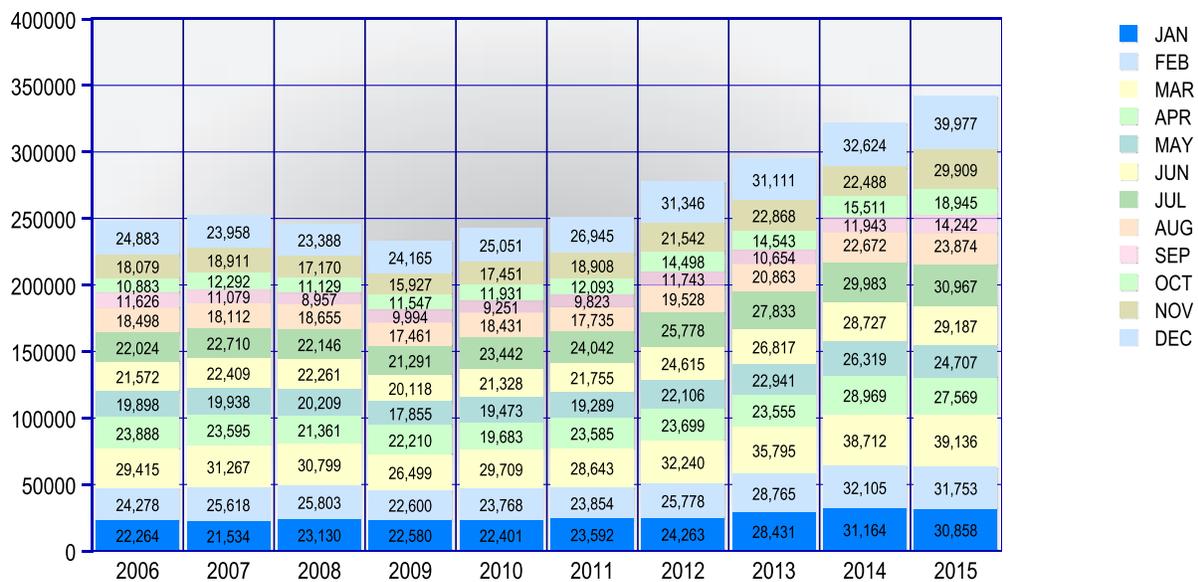


TABLE I.4 TOTAL OVERNIGHT TOURIST ARRIVALS BY PURPOSE

Season	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	%Change '14 vs '15
Regular	190,095	193,285	191,395	179,612	186,498	195,603	216,979	230,118	248,957	267,104	7.3
VFR	44,531	44,607	43,515	42,178	44,074	42,082	47,548	50,664	54,781	58,988	7.7
Business	11,281	10,891	8,822	8,810	9,323	11,031	11,118	11,281	15,035	14,203	-5.5
Official	1,403	2,639	1,275	1,649	2,025	1,547	1,490	2,114	2,447	829	-66.1
Total	247,309	251,422	245,007	232,249	241,919	250,263	277,135	294,177	321,220	341,125	6.2

REPORTS ON BELIZE'S OVERNIGHT TOURISM SECTOR

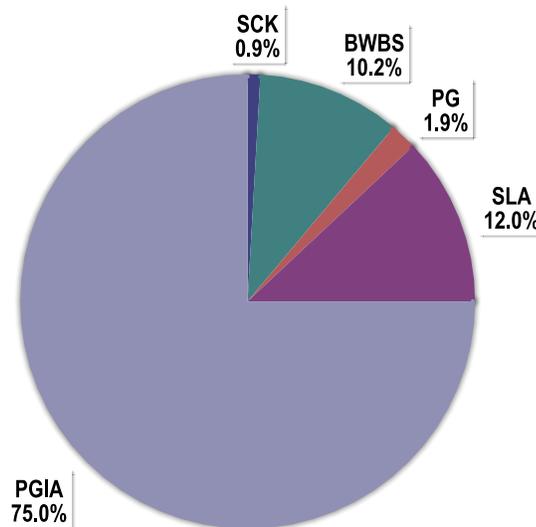
Overnight tourist visitors can be classified into major categories according to their main purpose of visit in the country. The regular tourist visitor category can be further broken down into numerous other classifications including health, religion, volunteer, and vacation among others.

The Philip Goldson International Airport (PGIA) remains the largest port of entry in the country. This port is the main entry point for American visitors, who account for 63% of Belize's overnight guests annually. The second largest port of entry in terms of tourist visitor traffic is the Belize Northern border station. Many tourists from Europe come through this port while visiting Guatemala and Belize. They would use it as an exit or an entry point depending on which of the countries they choose to visit first. This port is also frequently visited by Belizeans who choose to visit Mexico for leisure or business. The Western border is the third largest port of entry for tourist visitor inflows to Belize.

TABLE I.5 TOTAL OVERNIGHT TOURIST ARRIVALS BY PORT OF ENTRY

Entry Port	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	%Change '14 vs '15
PGIA	178,552	182,904	178,360	168,047	172,402	181,996	211,781	223,510	239,255	255,923	7
SLA	21,540	22,555	23,783	21,107	24,632	28,710	29,886	31,369	38,675	40,875	5.7
BWBS	38,667	36,261	33,323	33,060	34,953	27,797	24,972	28,753	32,763	34,714	6
SCK	816	740	1,017	1,297	2,217	4,127	3,241	2,997	3,197	3,167	-0.9
PGA	7,734	8,962	8,524	8,738	7,715	7,633	7,255	7,548	7,330	6,446	-12.1
Total	247,309	251,422	245,007	232,249	241,919	250,263	277,135	294,177	321,220	341,125	6.2

FIGURE I.2 TOTAL OVERNIGHT TOURIST ARRIVALS BY ENTRY PORT

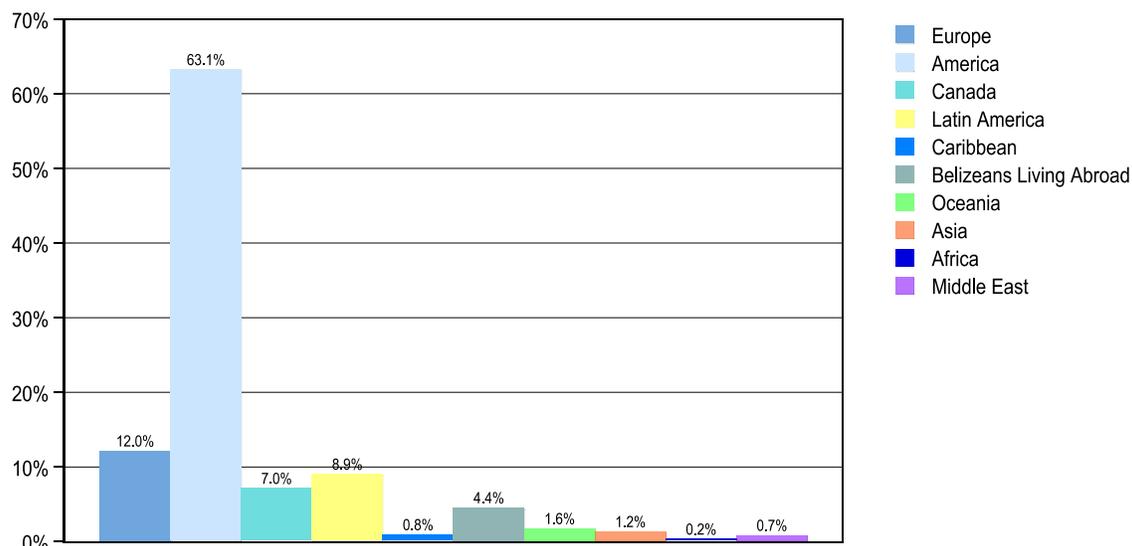


REPORTS ON BELIZE'S OVERNIGHT TOURISM SECTOR

TABLE I.6 OVERNIGHT TOURIST VISITORS TO BELIZE BY COUNTRY/ REGION OF ORIGIN

Market	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	%Change '14 vs '15
Europe	34,373	34,175	34,269	29,603	30,025	30,142	29,362	32,191	38,905	40,945	5.2
America	151,510	152,569	148,624	139,561	145,872	156,293	176,642	183,513	199,320	215,183	8
Canada	15,553	16,655	17,695	17,211	18,246	20,093	24,223	26,713	26,397	24,026	-1.2
Latin America	29,932	29,860	27,000	29,080	28,944	24,692	23,809	27,941	29,461	30,502	5.2
Caribbean	2,319	2,595	2,307	2,388	2,505	2,049	2,288	2,179	2,269	2,641	16.4
Belizeans living abroad	8,365	9,160	8,779	8,365	8,817	10,157	12,102	11,489	13,858	15,170	9.5
Oceania	2,149	2,202	2,460	2,514	3,133	2,741	3,490	4,431	5,150	5,609	8.9
Asia	2,367	3,280	2,774	2,459	2,937	2,995	3,443	3,430	2,911	4,091	40.5
Africa	359	491	512	668	577	472	453	403	454	602	32.6
Middle East	381	435	588	400	863	628	1324	1,885	2,495	2,357	-5.5
TOTAL	247,309	251,422	245,007	232,249	241,919	250,263	277,135	294,177	321,220	341,125	6.2

FIGURE I.3 TOTAL OVERNIGHT TOURIST ARRIVALS BY COUNTRY/ REGION OF ORIGIN



The United States remained Belize's largest market in 2015, accounting for over 63% of annual tourist visitors to Belize. Visitors from Europe accounted for 12.0% of annual visitors, followed by visitors from Canada at 7.0% of the total.

REPORTS ON BELIZE'S OVERNIGHT TOURISM SECTOR

TABLE I.7 OVERNIGHT TOURIST VISITORS TO BELIZE BY COUNTRY/ REGION OF MARKET SHARE

Market (% Share)	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Europe	13.9	13.6	14	12.7	12.4	12	10.6	11	12.1	12
America	61.3	60.7	60.7	60.1	60.3	62.5	63.7	62.4	62.1	63
Canada	6.3	6.6	7.2	7.4	7.5	8	8.7	9.1	8.2	7
Latin America	12.1	11.9	11	12.5	12	9.9	8.6	9.5	9.2	8.9
Caribbean	0.9	1	0.9	1	1	0.8	0.8	0.7	0.7	0.8
Belizeans Living Abroad	3.4	3.6	3.6	3.6	3.6	4.1	4.4	3.9	4.3	4.4
Oceania	0.9	0.9	1	1.1	1.3	1.1	1.3	1.5	1.6	1.6
Asia	1	1.3	1.1	1.1	1.2	1.2	1.2	1.2	0.9	1.2
Africa	0.1	0.2	0.2	0.3	0.2	0.2	0.2	0.1	0.1	0.2
Middle East	0.2	0.2	0.2	0.2	0.4	0.2	0.5	0.6	0.8	0.7
TOTAL	100	100	100	100	100	100	100	100	100	100

Over the years, the arrival pattern of American visitors has remained relatively the same. The month of March is known to be the peak of the tourism high season, which normally coincides with spring travel in the United States. The month of September is known to be the weakest month in terms of arrivals for American visitors. Also, the period from August through late October coincides with the period of inclement weather in the Caribbean. This could interrupt travel plans and be a major factor for decreases seen in U.S. arrivals to Belize around this time. Since visitors from the United States account for the majority of overnight tourist visitors, the pattern of visitors from the U.S. strongly influences the growth of total overnight visitors to Belize annually.

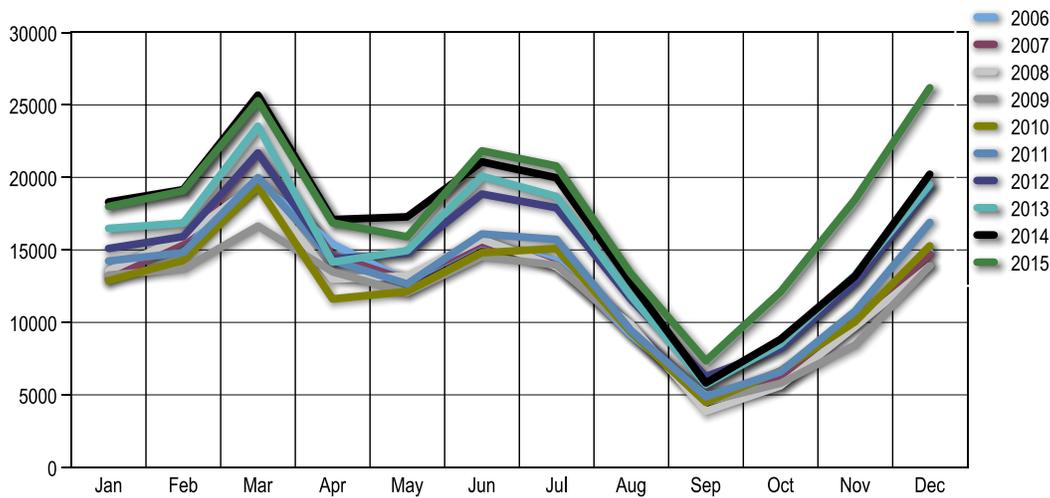
TABLE I.8 AMERICAN OVERNIGHT TOURIST VISITORS TO BELIZE BY MONTH

Month	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	% Change '14 vs'15
Jan	13,583	12,960	13,553	13,268	12,872	14,229	15,094	16,476	18,297	17,991	-1.7
Feb	15,661	15,568	15,901	13,683	14,278	14,808	15,909	16,848	19,151	19,075	-0.4
Mar	19,690	21,673	19,586	16,637	19,365	19,984	21,677	23,538	25,679	25,282	-1.5
Apr	15,405	14,614	12,969	13,484	11,607	14,273	14,375	14,162	17,089	16,864	-1.3
May	12,829	12,905	13,205	12,043	12,126	12,650	14,754	14,948	17,271	15,903	-7.9
Jun	15,473	15,525	15,726	14,527	14,794	16,092	18,847	20,078	21,073	21,835	3.6
Jul	14,231	13,985	13,833	13,951	15,093	15,719	17,903	18,682	19,976	20,783	4
Aug	9,128	9,527	9,856	9,357	9,306	9,435	11,562	11,802	12,740	13,347	4.8
Sep	4,945	4,783	3,859	4,510	4,472	4,860	6,262	5,704	5,817	7,341	26.2
Oct	5,669	6,324	5,611	5,786	6,648	6,582	8,190	8,507	8,821	12,097	37.1
Nov	10,047	10,001	9,691	8,433	10,035	10,770	12,730	13,257	13,188	18,481	40.1
Dec	14,848	14,702	13,865	13,881	15,275	16,890	19,337	19,510	20,219	26,183	29.5
TOTAL	151,509	152,567	147,655	139,561	145,872	156,293	176,642	183,513	199,320	215,183	8

REPORTS ON BELIZE'S OVERNIGHT TOURISM SECTOR

In 2015 there were decreases in arrivals for the American market in each of the first five months of the year. Even though these decreases were not large in size, there was reason to be concerned about the performance of this particular sector for the remainder of the year. Thereafter, overnight arrivals from the U.S. market took a positive turn and in the last four months of 2015, American overnight arrivals to Belize showed a significant increase. It is worthwhile to note that Southwest Airlines commenced flights to Belize around the middle of October 2015. This additional flight, through the Houston hub, offered air travelers another carrier option, adding to the competitive air travel market. As a result, Belize benefited from this in the form of increased overnight tourist visitor arrivals from the U.S. in the last quarter of 2015.

FIGURE 1.4 AMERICAN OVERNIGHT TOURIST VISITORS TO BELIZE BY MONTH



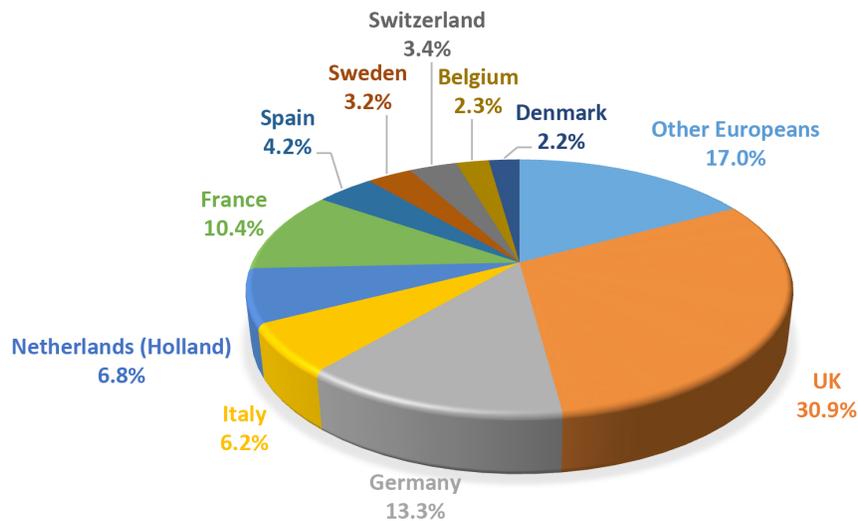
Europe is Belize's second largest tourism market. Most of the European visitors to Belize originate from the United Kingdom, Germany, and France. European visitors to Belize have increased steadily over the past three years. Presently, there are a few connecting flights from Europe to Belize through the United States, Mexico, and El Salvador. Many European visitors who come to Belize enter via the land borders as they visit Mexico and neighboring Central American countries as well, usually during the same trip.

REPORTS ON BELIZE'S OVERNIGHT TOURISM SECTOR

TABLE I.9 EUROPEAN OVERNIGHT TOURIST VISITORS TO BELIZE BY COUNTRY OF REGION

European Country	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	% Change '14 vs '15
Other Europeans	6,413	6,972	6,995	7,124	6,615	5,707	5,636	6,543	6,809	6,968	2.3
UK	9,799	10,180	10,100	8,534	9,301	8,199	7,981	9,070	11,357	12,650	11.4
Germany	4,308	4,054	4,161	3,376	3,438	3,262	3,525	3,961	5,065	5,445	7.5
Italy	3,073	2,702	2,371	1,679	1,877	2,218	1,774	1,694	2,552	2,543	-0.3
Netherlands (Holland)	4,071	3,496	3,915	2,607	2,461	2,869	2,384	2,520	2,582	2,802	8.5
France	3,167	3,126	3,258	3,269	2,916	3,101	3,308	3,070	4,132	4,262	3.1
Spain	1,727	1,806	1,627	1,472	1,535	1,440	1,244	1,391	1,599	1,708	6.8
Sweden	1,053	1,088	1,130	800	841	847	1,018	1,093	1,489	1,324	-11.1
Switzerland	763	750	713	742	1,041	1,021	905	1,041	1,296	1,396	7.7
Belgium						531	858	695	918	954	4
Denmark						947	729	1,114	1,107	899	-18.8
TOTAL	34,374	34,174	34,270	29,603	30,025	30,142	29,362	32,191	38,905	40,952	5.3

FIGURE I.5 EUROPEAN OVERNIGHT TOURIST ARRIVALS BY PERCENT SHARE



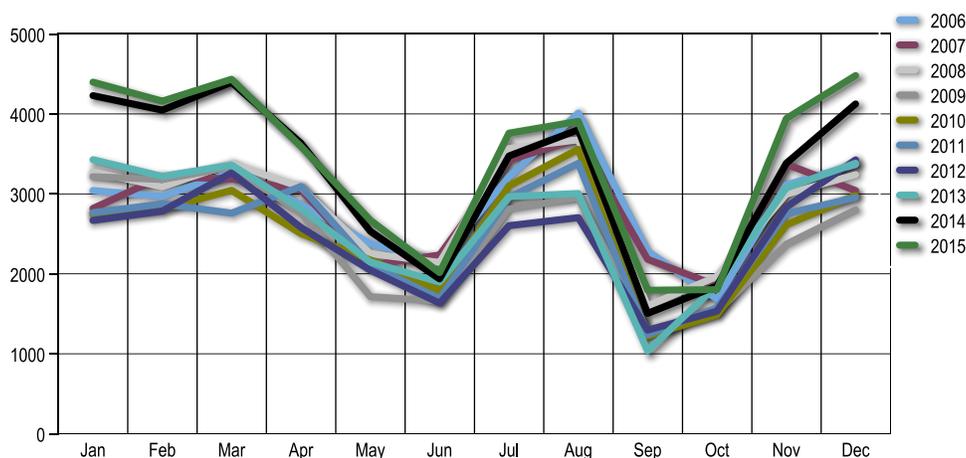
Incremental growth was seen in the European market during 2015. Over 30% of visitors from Europe came to Belize from the United Kingdom, followed by visitors from Germany who accounted for over 13% of the European market share. For the most part, 2015 could be viewed as a year of progress for Belize with regards to making inroads into the European market. There were only two months in 2015 in which arrivals from Europe decreased, and those percentage decreases were quite minimal.

REPORTS ON BELIZE'S OVERNIGHT TOURISM SECTOR

TABLE I.10 EUROPEAN OVERNIGHT TOURIST VISITORS TO BELIZE BY MONTH

Month	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	% Change '14 vs '15
Jan	3,041	2,818	3,276	3,215	2,744	2,765	2,667	3,427	4,229	4,397	4
Feb	2,969	3,215	3,088	3,179	2,812	2,874	2,785	3,218	4,047	4,160	2.8
Mar	3,292	3,188	3,381	3,335	3,044	2,758	3,264	3,362	4,395	4,434	0.9
Apr	2,869	3,052	3,083	2,764	2,503	3,092	2,579	2,814	3,633	3,593	-1.1
May	2,376	2,108	2,251	1,714	2,174	2,114	2,044	2,146	2,532	2,670	5.5
Jun	2,157	2,235	2,142	1,657	1,791	1,686	1,633	1,895	1,935	2,013	4.1
Jul	3,213	3,421	3,568	2,810	3,101	2,954	2,602	2,967	3,473	3,759	8.2
Aug	4,011	3,691	3,677	2,952	3,559	3,383	2,703	3,004	3,802	3,907	2.8
Sep	2,282	2,181	1,599	1,287	1,219	1,237	1,294	1,035	1,503	1,794	19.4
Oct	1,683	1,852	1,967	1,520	1,485	1,573	1,531	1,856	1,847	1,801	-2.5
Nov	3,112	3,372	2,996	2,370	2,613	2,753	2,835	3,074	3,383	3,942	16.5
Dec	3,367	3,041	3,240	2,801	2,981	2,953	3,425	3,394	4,125	4,480	8.6
TOTAL	34,373	34,174	34,269	29,603	30,025	30,142	29,362	32,191	38,905	40,952	5.3

FIGURE I.6 EUROPEAN OVERNIGHT TOURIST ARRIVALS BY MONTH



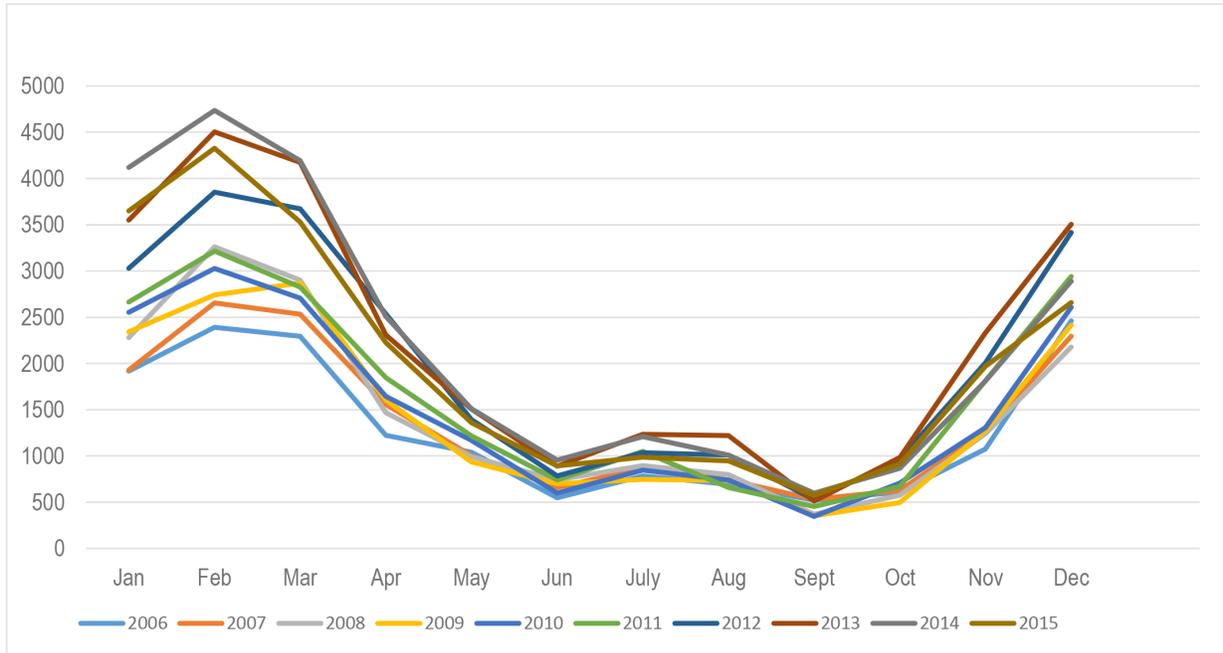
Canada is the third largest market for tourist visitors to Belize. There was a 9.0% decrease in Canadian visitors to Belize in 2015, with decreases in each month, except in October and November. A suspected factor for this market decline, which affected both Belize and the Caribbean, was the level of economic instability (specifically, falling oil prices) which had affected the Canadian economy during late 2014 and into 2015. There have been efforts made by tourism stakeholders in Belize to increase marketing efforts to Canada and to increase airlift capacity. If those efforts prove successful in 2016, there could be a positive shift in the arrival trend of Canadian visitors to Belize in the near future.

REPORTS ON BELIZE'S OVERNIGHT TOURISM SECTOR

TABLE I.11 CANADIAN OVERNIGHT TOURIST VISITORS TO BELIZE BY MONTH

Month	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	% Change '14 vs '15
Jan	1,917	1,929	2,279	2,343	2,552	2,664	3,029	3,549	4,119	3,650	-11.4
Feb	2,390	2,654	3,261	2,742	3,027	3,215	3,852	4,504	4,736	4,327	-8.6
Mar	2,294	2,532	2,899	2,869	2,706	2,827	3,672	4,174	4,194	3,530	-15.8
Apr	1,223	1,557	1,466	1,603	1,645	1,847	2,537	2,308	2,506	2,226	-11.2
May	1,039	1,003	991	936	1,168	1,218	1,393	1,507	1,511	1,358	-10.1
Jun	547	658	740	698	598	742	783	890	955	891	-6.7
July	785	865	896	748	846	1,050	1,034	1,234	1,208	985	-18.4
Aug	692	742	799	731	739	657	1,008	1,220	1,008	946	-6.1
Sept	521	531	369	352	346	453	527	511	597	574	-3.9
Oct	610	627	576	495	706	669	967	983	866	914	5.6
Nov	1,075	1,263	1,239	1,270	1,304	1,812	2,007	2,330	1,808	1,969	8.9
Dec	2,460	2,294	2,178	2,414	2,607	2,939	3,415	3,505	2,889	2,657	-8
TOTAL	15,553	16,655	17,693	17,201	18,246	20,093	24,223	26,713	26,397	24,026	-9

FIGURE I.7 CANADIAN OVERNIGHT ARRIVALS BY MONTH



REPORTS ON BELIZE'S OVERNIGHT TOURISM SECTOR

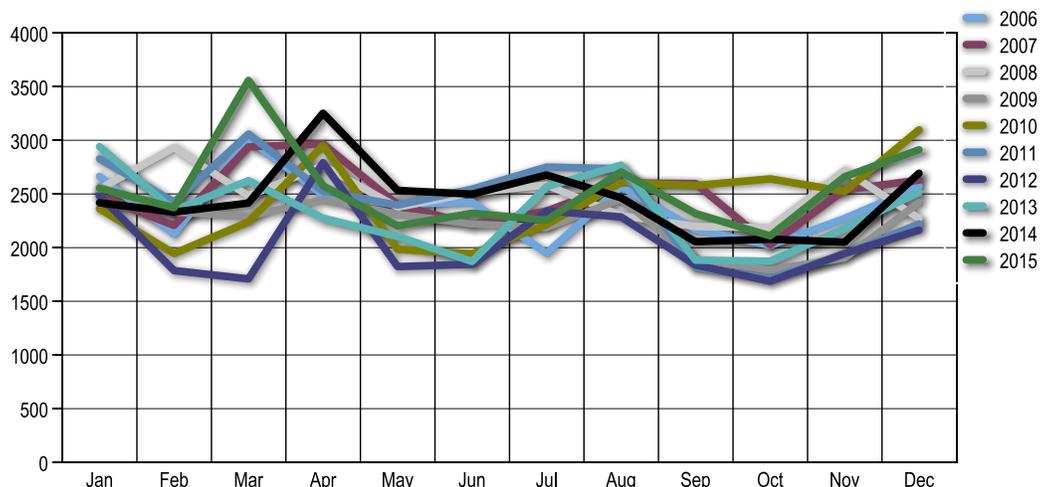
Over the past four years there have been increases in overnight visitors from Latin America to Belize. When combined, the annual number of visitors from Latin America to Belize exceeds the number of visitors from Canada. However, the Latin American market is comprised of countries from different continents; and as such, visitors from Latin America are not considered a separate and distinct market. This classification/combination of arrivals into one market is only done for specific reporting purposes.

In 2015, there was a 3.6% increase in overnight arrivals from the Latin American regions with the first, third, and fourth quarters in particular showing these increases. Latin America is a target market that Belize seeks to tap into in the coming years, beginning with increased marketing efforts in the South American region in 2016.

TABLE I.12 LATIN AMERICAN OVERNIGHT VISITORS BY MONTH

Month	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	%Change '14 vs '15
January	2,663	2,480	2,545	2,562	2,362	2,827	2,483	2,941	2,417	2,551	5.5
February	2,125	2,206	2,931	2,330	1,945	2,423	1,785	2,345	2,331	2,371	1.7
March	3,013	2,938	2,482	2,291	2,238	3,057	1,708	2,624	2,414	3,558	47.4
April	2,489	2,966	2,762	2,446	2,952	2,525	2,791	2,273	3,252	2,575	-20.8
May	2,401	2,399	2,376	2,311	1,984	2,395	1,823	2,103	2,533	2,202	-13.1
June	2,422	2,215	2,511	2,219	1,942	2,544	1,844	1,870	2,498	2,319	-7.2
July	1,948	2,340	2,583	2,186	2,214	2,750	2,341	2,567	2,676	2,255	-15.7
August	2,568	2,602	2,298	2,452	2,604	2,734	2,286	2,767	2,463	2,706	9.9
September	2,169	2,597	2,196	1,890	2,578	1,819	1,837	1,883	2,054	2,318	12.8
October	2,019	2,023	2,185	1,790	2,640	1,713	1,686	1,873	2,079	2,108	1.4
November	2,271	2,539	2,718	1,903	2,523	1,935	1,945	2,178	2,050	2,660	29.7
December	2,570	2,628	2,274	2,419	3,097	2,221	2,163	2,517	2,693	2,911	8.1
TOTAL	29,932	29,860	27,000	29,080	28,944	24,692	23,809	27,941	29,461	30,533	3.6

FIGURE I.8 LATIN AMERICAN OVERNIGHT ARRIVALS BY MONTH





REPORTS ON BELIZE'S OVERNIGHT TOURISM SECTOR

International airline carriers in Belize include US Airways from Charlotte, North Carolina; American Airlines from Dallas, Texas and Miami, Florida; United Airlines from Houston, Texas; and Avianca (Taca) from San Salvador, El Salvador and Houston. In addition to these, Delta Airlines arrives from Atlanta, Georgia, and Aero Caribbean brings in a few visitors monthly from Havana, Cuba. In 2015, there were two new carriers added to the flight schedule. Southwest Airlines, which connects Belize to Houston, Texas, and also Copa Airlines, which flies to Panama, were both added to the flight schedule in October and November of 2015, respectively.

Maya Island Air and Tropic Air are two local air carriers that offer flights from the international airport to various tourism destinations across the country. These local carriers bring visitors from Mexico, Honduras and Guatemala to Belize as well. There are also a few charters and private flights that come into Belize every year.

TABLE I.13 TOTAL OVERNIGHT TOURIST ARRIVALS AT PHILIP GOLDSON INTERNATIONAL AIRPORT (PGIA) BY MONTH

Month	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	%Change '14 vs '15
January	16,144	15,358	16,293	16,082	15,044	16,799	18,558	19,965	22,562	21,974	-2.6
February	18,728	18,708	19,791	16,682	17,433	18,155	20,450	21,676	24,148	24,079	-0.3
March	22,852	25,195	24,664	20,004	22,877	22,988	25,982	28,623	30,754	30,032	-2.3
April	18,262	17,565	15,643	16,127	14,326	16,669	17,969	17,424	21,028	20,397	-3
May	14,933	15,349	15,519	14,059	14,160	14,253	17,214	17,699	19,924	18,965	-4.8
June	16,703	17,141	17,307	16,210	16,077	16,847	20,212	21,820	22,801	23,491	3
July	16,007	15,968	15,658	15,829	16,650	16,935	19,935	21,220	22,490	24,020	6.8
August	11,567	12,249	12,223	11,693	11,401	11,238	13,844	15,296	15,680	16,287	3.9
September	6,069	6,289	5,338	6,027	5,866	6,078	7,914	7,616	7,692	9,222	19.9
October	7,149	8,268	6,954	7,379	8,097	8,000	10,325	10,869	11,066	14,720	33
November	12,203	12,334	12,193	10,791	12,212	13,387	16,098	17,031	16,581	22,252	34.2
December	17,951	18,491	16,777	17,165	18,259	20,648	23,312	24,270	24,528	30,484	24.3
TOTAL	178,568	182,915	178,360	168,047	172,402	181,996	211,811	223,510	239,255	255,923	7

There were slight decreases in overnight arrivals to Belize through the Philip Goldson International Airport (PGIA) in the first two quarters of the year. However, the third and fourth quarters had a tremendous increase in tourist visitor traffic, due to the addition of Southwest and Copa Airlines in the latter part of the year. The annual percentage increase in visitor traffic through the PGIA in 2015 was equal to the annual percentage increase in visitor traffic in 2014.

REPORTS ON BELIZE'S OVERNIGHT TOURISM SECTOR

FIGURE I.9 AIRPORT TOURIST ARRIVALS BY MONTH

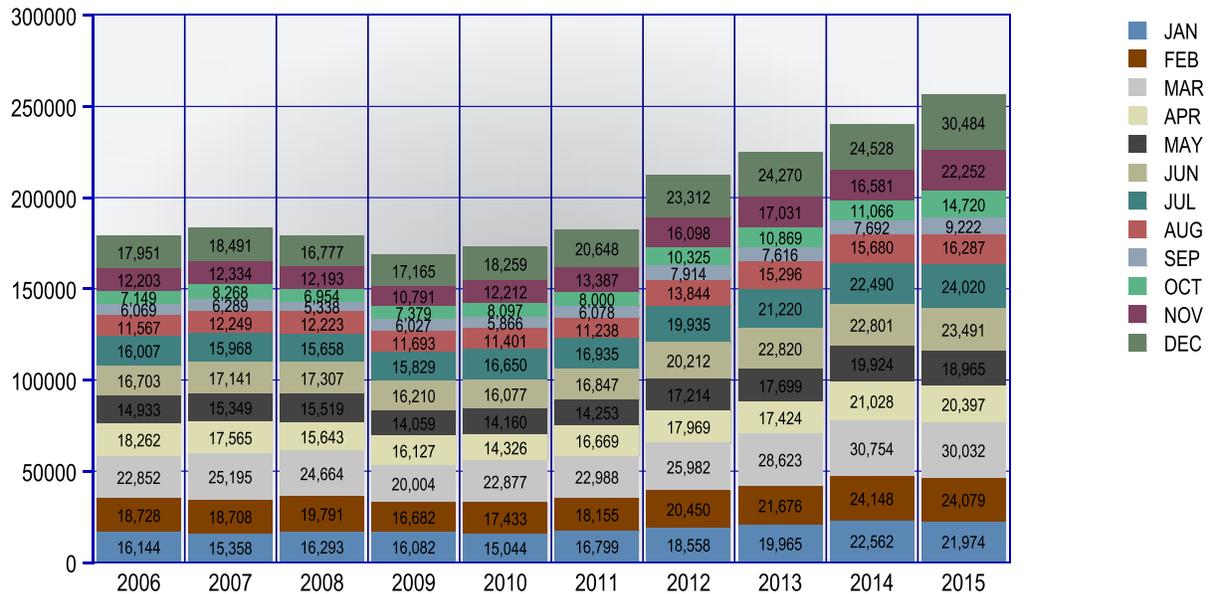


TABLE I.14 TOTAL OVERNIGHT TOURIST ARRIVALS AT PHILIP GOLDSON INTERNATIONAL AIRPORT (PGIA) BY QUARTER

Quarter	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	% Change '14 vs '15
1st Quarter	57,724	59,261	60,748	52,768	55,354	57,942	64,989	70,264	77,464	76,084	-1.8
2nd Quarter	49,898	50,056	48,468	46,396	44,563	47,769	55,395	56,944	63,754	62,853	-1.4
3rd Quarter	33,643	34,506	33,219	33,548	33,917	34,251	41,693	44,133	45,862	49,529	8
4th Quarter	37,304	39,093	35,924	35,335	38,568	42,034	49,735	52,170	52,175	67,456	29.3
Total	178,568	182,915	178,360	168,047	172,402	181,996	211,811	223,510	239,255	255,923	7

TABLE I.15 TOTAL OVERNIGHT TOURIST ARRIVALS AT PHILIP GOLDSON INTERNATIONAL AIRPORT (PGIA) BY SEASON

Season	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	% Change '14 vs '15
'Winter'	75,985	76,826	76,391	68,896	69,680	74,611	82,957	87,687	98,492	96,482	-2
Summer	102,583	106,089	101,969	99,151	102,722	107,385	128,854	135,822	140,763	159,441	13.3
Total	178,568	182,915	178,360	168,047	172,402	181,996	211,811	223,510	239,255	255,923	7



SECTION II



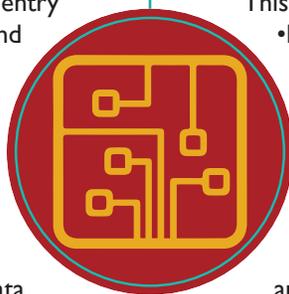
Reports From The CTO's Management Information System For Tourism

SECTION 11

REPORTS FROM THE CTO'S MANAGEMENT INFORMATION SYSTEM FOR TOURISM



The Management Information System for Tourism (MIST) is a desktop application software for the data entry of Embarkation/Disembarkation (E/D) Cards and a reporting application for the production of management reports. The system was developed by the Caribbean Tourism Organization (CTO) around the "CTO Standard E/D card". The MIST however, can accommodate all fields from a CARICOM card.



architecture.

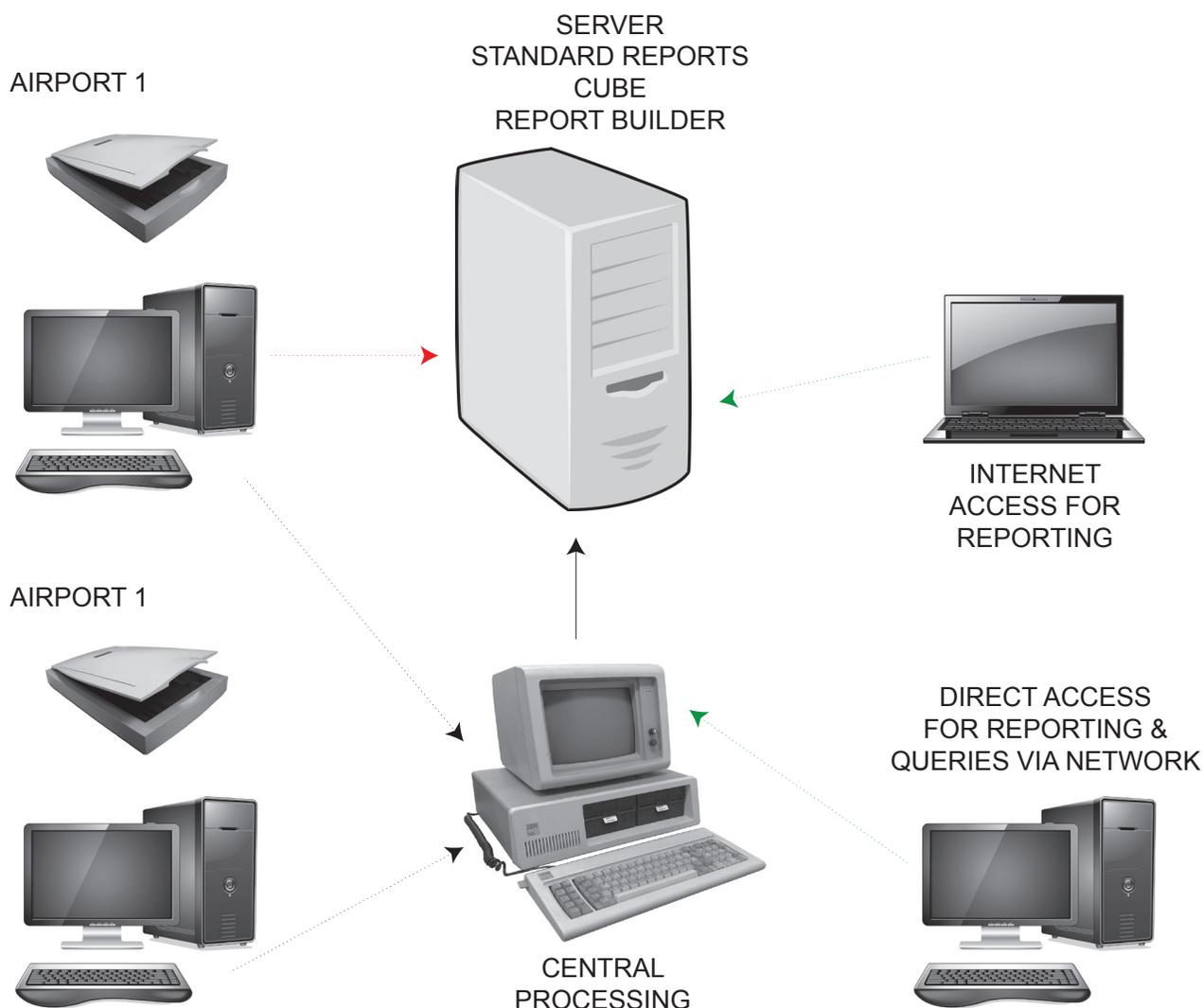
This means the system has been split into three levels:

- Front End/user interface
- Middle Tier/Business Objects and rules developed in Microsoft Visual FoxPro 9.0 SPI
- Back End/ Database developed in Microsoft SQL Server 2005

CTO MIST (Reporting Application): The Reporting Application utilizes SQL Server Reporting Services along with the Report Builder and Analysis Services for providing "Cube Analysis" of the data.

CTO MIST (Data Entry Application): The Data Entry system has been developed using a 3-tiered

FIGURE 2.1 MIST NETWORK INFRASTRUCTURE DIAGRAM



REPORTS FROM THE CTO'S MANAGEMENT INFORMATION SYSTEM FOR TOURISM

FIGURE 2.2 BELIZE IMMIGRATION & NATIONALITY DEPARTMENT'S E/D ARRIVAL FORM



WELCOME TO BELIZE ARRIVAL RECORD

PLEASE PRINT

1. Full Name: _____
Surname Firstname MI

2. Sex: Male: (1) Female: (2) 3. Nationality _____

4. Date of Birth: ____/____/____ 5. Country of Birth: _____
Day Month Year

6. Passport Number: _____
 Date of Issue: ____/____/____
Day Month Year
 Place of Issue: _____
Discrict/State/Province Country

7. Occupation: _____

8. Mode of Transportation Airline/Vehicle/Vessel No. _____

9. Last Port of Embarkation _____
City Country

10. Permanent Address: _____
No. Street
City/Town/Village District/State/Province ZipCode Country

Signature of Passenger

NON RESIDENTS ONLY

11. Intended address in Belize: _____
No. Street
City /Town/Village District

12. Intended lenght of stay in Belize _____ days

13. Purpose of Visit: Business (1) Leisure (2) Official (3)
 Family/Friends (4) Transit (5) Other (9) _____
(specify)

14. Intended Accommodation: Hotel (1) Guest House (2) Boat (3)
 Private (4) Resort (5) Other (9) _____
(specify)

15. Have you visited Belize before? Yes (1) No (2)

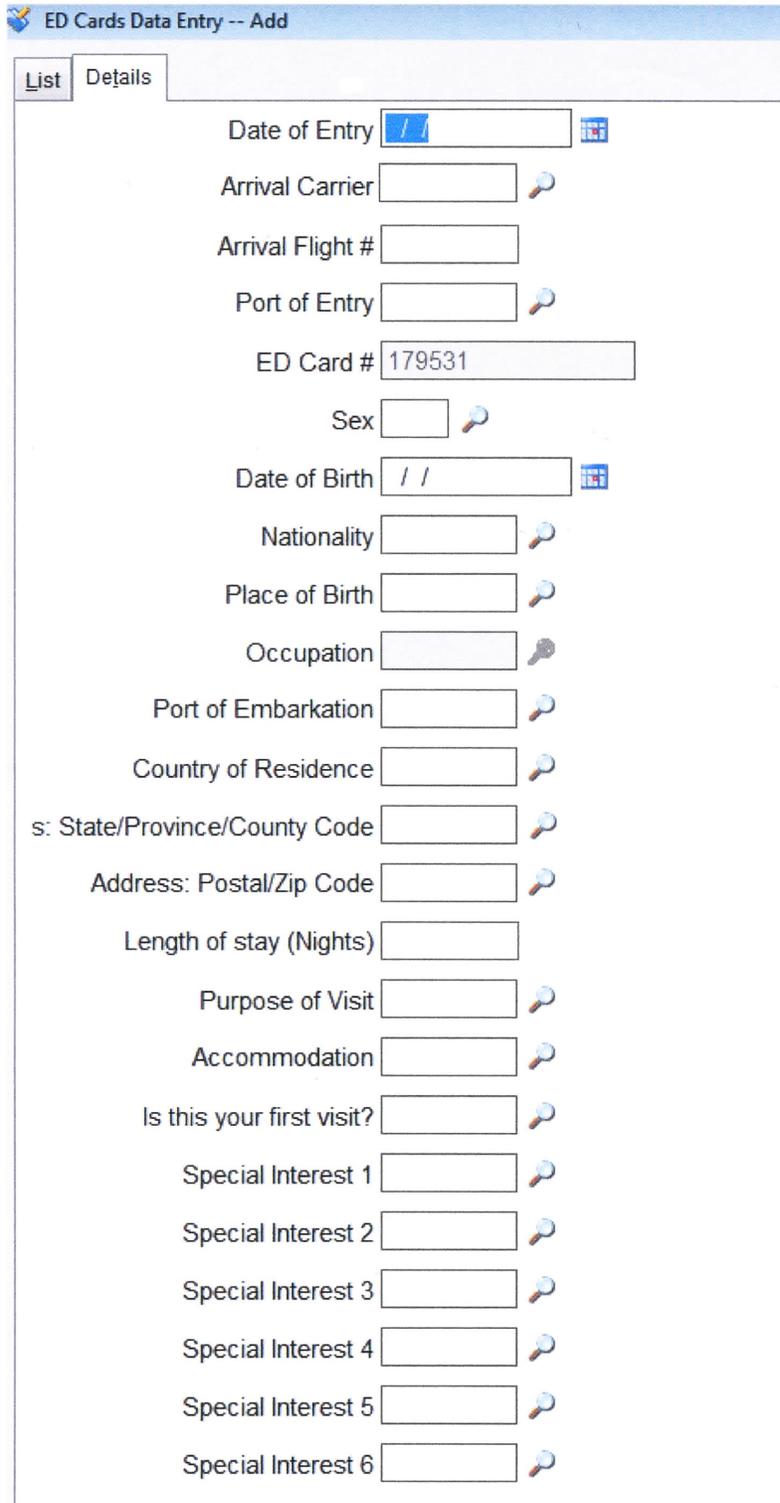
16. Special Interests: Nature (1) Diving/Snorkeling (2) Fishing (3)
 Archaeology (4) Beaches (5) Other (9) _____
(specify)

Official Use

port: _____

Permitted to remain no longer than ____/____/____ type: _____
Day Month Year

FIGURE 2.3 MANAGEMENT INFORMATION SYSTEM FOR TOURISM (MIST) DATA ENTRY USER INTERFACE



The screenshot displays a web-based data entry form titled "ED Cards Data Entry -- Add". The form is organized into a "Details" tab, with a "List" tab also visible. The fields are as follows:

- Date of Entry: (includes a calendar icon)
- Arrival Carrier:
- Arrival Flight #:
- Port of Entry:
- ED Card #:
- Sex:
- Date of Birth: (includes a calendar icon)
- Nationality:
- Place of Birth:
- Occupation:
- Port of Embarkation:
- Country of Residence:
- s: State/Province/County Code:
- Address: Postal/Zip Code:
- Length of stay (Nights):
- Purpose of Visit:
- Accommodation:
- Is this your first visit?:
- Special Interest 1:
- Special Interest 2:
- Special Interest 3:
- Special Interest 4:
- Special Interest 5:
- Special Interest 6:

REPORTS FROM THE CTO'S MANAGEMENT INFORMATION SYSTEM FOR TOURISM

The Embarkation/Disembarkation (ED) cards capture basic information from Belize's visitors as they pass through the numerous ports of entry. At the moment, the Belize Tourism Board's Marketing Intelligence Unit only gathers the E/D cards for visitors who come through the Philip Goldson International Airport. Some of the key visitor information from the Immigration Department's E/D card is then inputted into the MIST (Data Entry Application). The information is then manually transferred to the reporting application of the MIST from which both standard and ad-hoc reports can be generated. A few examples of these ad-hoc reports that can be generated from the MIST (Reporting Application) can be seen below:

TABLE 2.1 TOURIST AIR ARRIVALS BY U.S. ORIGIN STATE

Northwest	2013	2014	2015
Alaska	513	621	590
Idaho	1002	1194	1268
Montana	1783	1242	1399
Oregon	3164	3356	3205
Washington	6310	7133	6318
Wyoming	555	838	757
	13327	14384	13537

North	2013	2014	2015
Illinois	5563	5970	6542
Indiana	1730	2181	2302
Michigan	2443	3432	3224
Ohio	3269	3749	3870
Wisconsin	2476	3157	3103
	15481	18489	19041

North East	2013	2014	2015
New Hampshire	594	608	679
Vermont	427	505	441
Maine	404	418	556
	1425	1531	1676

Midwest	2013	2014	2015
Iowa	1003	1272	1431
Kansas	1309	1389	1633
Minnesota	3324	4046	3775
Missouri	2071	2699	2551
Nebraska	960	869	967
Dakota, North	116	242	201
Dakota, South	356	462	406
	9139	10979	10964

South West	2013	2014	2015
Arkansas	513	621	1273
Louisiana	1562	1868	2218
Oklahoma	1884	2040	2084
Texas	21114	23206	30190
	25073	27735	35765

South East	2013	2014	2015
Alabama	1629	1664	1559
Florida	8238	8631	8118
Georgia	4203	4553	4654
Mississippi	1018	1074	760
	15088	15922	15091

West	2013	2014	2015
Arizona	3343	3596	3773
California	23341	25998	26788
Colorado	6306	7281	8076
Hawaii	174	232	229
Nevada	1383	1655	1536
New Mexico	1049	1266	1260
Utah	1354	1438	1635
	36950	41466	43297

South	2013	2014	2015
District of Columbia	175	143	315
Kentucky	1102	1313	1358
Maryland	2881	3085	3202
Carolina, North	4071	4497	4824
Carolina, South	1680	1898	2045
Tennessee	2621	2746	2841
Virginia	4280	4811	4518
West Virginia	190	198	172
	17000	18691	19275

East	2013	2014	2015
Connecticut	1596	1517	1621
Delaware	263	297	205
Massachusetts	3310	3772	3997
New Jersey	3308	3554	4031
New York	8998	9659	10636
Pennsylvania	4024	4523	4709
Rhode Island	281	345	318
	21780	23667	25517

The majority of American visitors to Belize come from the west coast of the United States, followed by the south western part of the US. Belize saw a boost in the number of US visitors from the Texas area in 2015. This was due in large part to the accessible flight connectivity between the state of Texas and Belize. With the recent addition of Southwest Airlines which flies out of the city of Houston, expect to see continued growth in the number of US visitors to Belize from the Texas area.

REPORTS FROM THE CTO'S MANAGEMENT INFORMATION SYSTEM FOR TOURISM

TABLE 2.2 TOURIST AIR ARRIVALS BY CANADIAN ORIGIN PROVINCE

Canadian Provinces	2013	2014	2015
Alberta	11911	11271	8164
British Columbia	2398	2576	2551
Manitoba	479	628	551
New Brunswick	74	80	111
Newfoundland	12	24	46
No Stated CAN. Prov.	4	21	155
Nova Scotia	202	288	352
Ontario	3706	3935	4288
Prince Edward Island	2	1	11
Quebec	794	890	877
Saskatchewan	442	581	560
Grand Total	20024	20295	17666

TABLE 2.3 TOURIST AIR ARRIVALS BY EUROPEAN ORIGIN COUNTRY

European Country	2013	2014	2015
Belgium	243	320	223
Denmark	145	168	260
France	1002	1429	1499
Germany	1174	1424	1363
Ireland	244	289	301
Italy	477	801	790
Netherlands	544	728	977
Norway	227	254	229
Spain	395	547	502
Sweden	268	384	332
Switzerland	341	467	508
United Kingdom	4364	5448	5902
Other	893	927	978
Total	10317	13186	13864

TABLE 2.4 TOURIST AIR ARRIVALS BY PURPOSE BY AIRLINE CARRIER 2013

2013	Business - Official	Business - Professional	Leisure	Visiting Family/Friends
AeroCaribbean	73	7	97	32
American Airlines	874	4289	61484	7782
United Airlines	416	570	60834	6523
Delta Airlines	151	996	29108	3982
Maya Island Air			2	
Other Air			46	2
Private Air	235	519	1898	39
Taca Air	491	2536	7601	1459
Tropic Air	18	221	2206	81
US Airways	14	81	4863	483
Total	2272	9219	168139	20383

REPORTS FROM THE CTO'S MANAGEMENT INFORMATION SYSTEM FOR TOURISM

TABLE 2.5 TOURIST AIR ARRIVALS BY PURPOSE BY AIRLINE CARRIER 2014

2014	Business - Official	Business - Professional	Leisure	Visiting Family/Friends
AeroCaribbean	28	4	83	16
American Airlines	700	3495	65957	7481
United Airlines	293	381	66962	7409
Delta Airlines	152	1132	37893	4726
Maya Island Air			1	
Other Air			1	
Private Air	250	447	1669	39
Taca Air	735	2642	8036	1158
Tropic Air	29	217	3806	123
US Airways	4	28	4843	421
Total	2191	8346	189251	21373

TABLE 2.6 TOURIST AIR ARRIVALS BY PURPOSE BY AIRLINE CARRIER 2015

2015	Business - Official	Business - Professional	Leisure	Visiting Family/ Friends
AeroCaribbean	25	6	153	41
American Airlines	769	3719	62391	7370
American Trans Air		3	20	1
Atlantic			4	
Continental Airlines	604	941	72693	8473
Copa Airlines	3	23	98	22
Delta Airlines	315	1460	38638	5039
Other Air	2	11	81	8
Private Air	240	743	1538	53
Southwest Airlines	15	75	6605	760
Taca Air	384	2461	7938	1248
Tropic Air	40	343	3821	190
US Airways	8	43	2555	188
Grand Total	2405	9832	196531	23393

REPORTS FROM THE CTO'S MANAGEMENT INFORMATION SYSTEM FOR TOURISM

TABLE 2.7 TOURIST AIR ARRIVALS BY SEX BY OCCUPATION 2013

2013	Female	Male
Agricultural/Forestry/Fishery Workers	154	809
Clerks	1768	918
Craft and Related Workers	233	1207
Defense Force/Military	296	1572
Elementary Occupation	479	671
Homemaker	5338	128
Legislators/Senior Officials/Managers	9488	11821
Not Stated	2519	1437
Other	19881	23508
Plant/Machine Operators and Assemblers	3	17
Professionals	25058	19945
Retired Person	8961	9858
Service /Shop, Market Sales Workers	2792	4572
Student	17324	14213
Technicians/Associate Professionals	3110	8964
Unemployed	784	386
(blank)	677	927
Grand Total	98865	100953

TABLE 2.8 TOURIST AIR ARRIVALS BY SEX BY OCCUPATION 2014

2014	Female	Male
Agricultural/Forestry/Fishery Workers	230	1062
Clerks	2307	922
Craft and Related Workers	130	1833
Defense Force/Military	332	1960
Elementary Occupation	283	504
Homemaker	6626	197
Legislators/Senior Officials/Managers	12061	14359
Not Stated	1201	662
Other	22851	26204
Plant/Machine Operators and Assemblers	8	36
Professionals	26190	21312
Retired Person	10576	11727
Service /Shop, Market Sales Workers	2651	4469
Student	19374	15456
Technicians/Associate Professionals	2609	8956
Unemployed	1148	641
(blank)	1250	1626
Grand Total	109827	111926

REPORTS FROM THE CTO'S MANAGEMENT INFORMATION SYSTEM FOR TOURISM

TABLE 2.9 TOURIST AIR ARRIVALS BY SEX BY OCCUPATION 2015

2015	Female	Male
Agricultural/Forestry/Fishery Workers	206	920
Clerks	1890	858
Craft and Related Workers	107	1084
Defense Force/Military	430	1676
Elementary Occupation	216	415
Homemaker	6311	238
Legislators/Senior Officials/Managers	10904	12120
Not Stated	821	520
Other	20735	23661
Plant/Machine Operators and Assemblers	16	57
Professionals	36202	31390
Retired Person	10025	10766
Service /Shop, Market Sales Workers	2847	4430
Student	19125	15260
Technicians/Associate Professionals	3330	9496
Unemployed	754	488
(blank)	1968	2687
Grand Total	115887	116066

TABLE 2.10 TOURIST AIR ARRIVALS BY SEX BY AGE 2013

	2013		
	age	female	male
under 18	8.50%	8449	8331
18 - 24	8.40%	9691	6919
25 - 34	20.00%	21286	18251
35 - 44	17.10%	16127	17681
45 - 54	19.80%	19308	19955
55 - 64	17.20%	15750	18228
65 and over	9.10%	7435	10505
gender:		49.50%	50.50%

TABLE 2.11 TOURIST AIR ARRIVALS BY SEX BY AGE 2014

	2014		
	Age	Female	Male
under 18	9.50%	13708	13380
18 - 24	8.90%	14758	10618
25 - 34	18.70%	28046	25173
35 - 44	16.70%	22312	25261
45 - 54	19.20%	26405	28252
55 - 64	16.80%	22508	25233
65 and over	10.00%	12371	16038
Gender:		49.30%	50.70%

REPORTS FROM THE CTO'S MANAGEMENT INFORMATION SYSTEM FOR TOURISM

TABLE 2.12 TOURIST AIR ARRIVALS BY SEX BY AGE 2015

	2015		
	age	female	male
under 18	8.80%	10191	9718
18 - 24	8.70%	11680	8133
25 - 34	20.70%	25519	21440
35 - 44	16.30%	17898	19004
45 - 54	19.10%	21239	22023
55 - 64	16.90%	18130	20189
65 and over	9.60%	9061	12610
gender:		50.10%	49.90%

TABLE 2.13 TOURIST AIR ARRIVALS BY ORIGIN REGION/COUNTRY

Region/Country	2013	2014	2015
Africa	206	213	311
Canada	20344	20351	17775
Caribbean	2043	2196	2417
Central America	4874	5974	5999
England	4364	5448	5902
Europe	5953	7738	7962
Other	3866	3496	4007
South America	1501	1483	2022
United States	156862	175021	185766
Grand Total	200013	221920	232161

Historical figures in combination with the 2015 data show the age demographics for Belize's overall visitor with females between the ages of 25 – 34 and males between the ages of 45 – 54.

TABLE 2.14 TOURIST AIR ARRIVALS BY PURPOSE OF VISIT BY ACCOMMODATION TYPE 2013

2013	Business - Official	Business - Professional	Leisure	Visiting Family/Friends
Bed & Breakfast	26	37	464	40
Cabin	3	4	689	25
Campsite		2	609	8
Community Based Tourism Establishment	25	79	1073	124
Guesthouse	58	196	8457	526
Hostel			266	5
Hotel	994	3952	18852	1217
Island Properties	3	13	979	34
Lodge	5	34	1654	81
Motel		1	2	
Private Home			123	16
Resort	35	286	18185	877
Self- Catering Units	17	123	11055	708
Timeshare		2	68	4
Not Stated	1106	4490	105663	16718
Grand Total	2272	9219	168139	20383

REPORTS FROM THE CTO'S MANAGEMENT
INFORMATION SYSTEM FOR TOURISM

**TABLE 2.15 TOURIST AIR ARRIVALS BY PURPOSE OF VISIT
BY ACCOMMODATION TYPE 2014**

2014	Business - Official	Business - Professional	Leisure	Visiting Family/Friends
Bed & Breakfast	3	8	138	13
Cabin		1	265	16
Campsite	1	1	480	13
Community Based Tourism Establishment			137	
Guesthouse	16	54	5412	276
Hostel			69	1
Hotel	852	3387	18593	1155
Island Properties	1	14	683	33
Lodge	2	10	1465	39
Motel		2	1	
Private Home			43	8
Resort	35	168	19821	920
Self-Catering Units	28	76	8862	497
Timeshare			4	
Not Stated	1253	4625	133278	18402
Grand Total	2191	8346	189251	21373

REPORTS FROM THE CTO'S MANAGEMENT INFORMATION SYSTEM FOR TOURISM

**TABLE 2.16 TOURIST AIR ARRIVALS BY PURPOSE OF VISIT
BY ACCOMMODATION TYPE 2015**

2015	Business - Official	Business - Professional	Leisure	Visiting Family/Friends
Bed & Breakfast	10	23	359	28
Cabin		11	355	13
Campsite			6	
Community Based Tourist Establishment	8	23	510	23
Guest house	107	546	12080	654
Hostel	1	6	150	
Hotel	771	4022	20633	1137
Island Properties		13	984	30
Lodge	5	40	2219	94
Motel			6	
Not Applicable	1436	4784	125932	19575
Private Home			84	3
Resort	49	244	22814	1147
Self-Catering Units	15	115	10375	687
Timeshare			2	
(blank)	3	5	22	2
Grand Total	2405	9832	196531	23393

REPORTS FROM THE CTO'S MANAGEMENT INFORMATION SYSTEM FOR TOURISM

TABLE 2.17 TOURIST AIR ARRIVALS BY VISITOR TYPE BY AIRLINE CARRIER 2013

Visitor Type	AeroCaribbean	American Airlines	United Airlines	Delta Airlines	Maya Island Air	Other Air	Private Air	Taca Air	Tropic Air	US Airways	Annual
Jan											
No Stated Visitor Type											
Resident	6	1297	554	169			54	409	98	10	2597
Same Day Visitor		26	8	1			114	17	20		186
Stay Over Visitor	11	7666	7391	3402			555	1165	214	413	20817
Feb											
No Stated Visitor Type											
Resident	4	916	387	109			25	284	128	12	1865
Same Day Visitor	2	34	5	5			47	20	12		125
Stay Over Visitor	15	8795	7466	3420			500	1459	250	699	22604
Mar											
No Stated Visitor Type											
Resident	6	1155	528	159			14	554	131	29	2576
Same Day Visitor		14	10	8		8	76	16	16		148
Stay Over Visitor	7	11568	10665	4051		37	579	1711	254	1381	30253
Apr											
No Stated Visitor Type											
Resident		942	389	137			18	275	193	13	1967
Same Day Visitor		12	7	2			74	12	22		129
Stay Over Visitor		5315	5613	2260		11	267	817	229	254	14766
May											
No Stated Visitor Type											
Resident	2	1394	523	187			16	394	230	21	2767
Same Day Visitor	2	17	16	1			33	19	21		109
Stay Over Visitor	16	7143	6534	2933			157	1079	214	520	18596
Jun											
No Stated Visitor Type											
Resident	6	1368	634	253		1	8	374	197	42	2883
Same Day Visitor		25	26	10			60	27	34	1	183
Stay Over Visitor	8	9014	7357	3306		4	193	922	166	1113	22083
Jul											
No Stated Visitor Type											
Resident	3	1928	844	307			32	453	200	48	3815
Same Day Visitor		18	78	7			64	17	33	6	223
Stay Over Visitor	47	8722	7368	3431			200	1156	307	873	22104
Aug											
No Stated Visitor Type											
Resident	5	2615	1184	494			24	699	256	68	5345
Same Day Visitor	6	23	9	11			12	20	21		102
Stay Over Visitor	52	5312	5366	2850			189	1171	327	370	15637
Sep											
No Stated Visitor Type											
Resident	1	1281	624	465			5	550	168		3094
Same Day Visitor	5	21	9	7			49	24	13		128
Stay Over Visitor	11	2279	2210	2173		4	167	876	182		7902
Oct											
No Stated Visitor Type											
Resident	1	1218	586	318			6	393	168		2690
Same Day Visitor		36	35	18			50	23	19		181
Stay Over Visitor	4	3311	3370	2932			180	902	171		10870
Nov											
No Stated Visitor Type											
Resident	3	1396	586	244	1		19	453	206	28	2936
Same Day Visitor		35	16	9			84	22	48	1	215
Stay Over Visitor	26	6371	5227	3506	2		241	1253	310	422	17358
Dec											
No Stated Visitor Type											
Resident	5	1939	894	340			8	350	238	33	3807
Same Day Visitor		35	116	11			42	24	60		288
Stay Over Visitor	11	9622	8686	4343		4	242	1424	479	455	25266
	285	103746	85967	42205	3	69	4442	19568	5786	6846	268917

REPORTS FROM THE CTO'S MANAGEMENT INFORMATION SYSTEM FOR TOURISM

TABLE 2.18 TOURIST AIR ARRIVALS BY VISITOR TYPE BY AIRLINE CARRIER 2014

Visitor Type	Aero Caribbean	Air Caribe	American Airlines	United Airlines	Delta Airlines	Maya Island Air	Other Air	Private Air	Taca Air	Tropic Air	US Airways	Annual
Jan												
No Stated Visitor Type	2		201	145	76			16	30	57	15	542
Resident	1		1391	595	274			23	363	229	22	2898
Same Day Visitor			55	38	36			104	62	91		386
Stay Over Visitor	2		8358	7834	4411			258	964	516	363	22706
Feb												
No Stated Visitor Type			206	126	45			10	35	61	12	495
Resident			903	385	190			9	292	163	13	1955
Same Day Visitor			67	25	20			108	16	92	2	330
Stay Over Visitor			9089	8303	4346			348	1143	399	687	24315
Mar												
No Stated Visitor Type			139	123	62			12	24	56	4	420
Resident	2		1128	561	209			7	375	227	22	2531
Same Day Visitor			32	32	11			74	17	64	1	231
Stay Over Visitor	26		10538	11901	5080		4	484	1557	511	1335	31436
Apr												
No Stated Visitor Type			176	144	60			10	39	62	11	502
Resident	2		1323	679	316			21	372	223	24	2960
Same Day Visitor			40	23	16			61	15	88		243
Stay Over Visitor	9		8556	6892	3681			300	1252	447	720	21857
May												
No Stated Visitor Type			241	189	91			19	40	75	6	661
Resident			1305	675	297			42	309	283	20	2931
Same Day Visitor			31	22	15			91	11	74	4	248
Stay Over Visitor	2		7736	6625	3516			259	778	328	503	19747
Jun												
No Stated Visitor Type	1		348	229	152			10	52	48	11	851
Resident	2		1464	794	324			7	388	249	56	3284
Same Day Visitor	2		28	27	11			66	27	74	1	236
Stay Over Visitor	6		8357	7772	4523			174	1071	238	774	22915
Jul												
No Stated Visitor Type	22		199	162	89	1	1	10	35	41	16	576
Resident	5		1853	1160	477	2		11	426	302	33	4269
Same Day Visitor			42	21	25		12	43	22	95		260
Stay Over Visitor	4		7697	7748	4418			246	1089	314	715	22231
Aug												
No Stated Visitor Type	22		158	146	104			11	32	41	4	518
Resident	1		2505	1481	768			4	623	285	45	5712
Same Day Visitor			35	13	25			64	23	94	1	255
Stay Over Visitor	1		5230	5031	3172			164	1111	287	270	15266
Sep												
No Stated Visitor Type	14		91	79	67			14	31	40		336
Resident			1320	727	415			5	555	210		3232
Same Day Visitor	2		18	14	16			64	32	66		212
Stay Over Visitor	2		2202	2208	1979			113	905	199		7608
Oct												
No Stated Visitor Type			165	127	116			26	31	67		532
Resident		2	1174	609	338			5	484	247		2859
Same Day Visitor			31	13	17			50	31	47		189
Stay Over Visitor		1	2992	3489	3139			209	805	203		10838
Nov												
No Stated Visitor Type	4		232	166	109			24	33	77	5	650
Resident	5		1321	707	436			26	498	315	24	3332
Same Day Visitor			50	7	24			96	24	107		308
Stay Over Visitor	28		5637	4757	3823			173	1265	386	246	16315
Dec												
No Stated Visitor Type			259	216	114			31	36	78	1	735
Resident			1919	1398	518			17	387	267	6	4512
Same Day Visitor			75	83	44			61	30	81	2	376
Stay Over Visitor			7329	8239	4962			172	1296	575	271	22844
	167	3	104246	92740	52957	3	17	4152	19036	9079	6245	288645

REPORTS FROM THE CTO'S MANAGEMENT INFORMATION SYSTEM FOR TOURISM

TABLE 2.19 TOURIST AIR ARRIVALS BY VISITOR TYPE BY AIRLINE CARRIER 2015

Visitor Type	AeroCaribbean	American Airlines	American Trans Air	Atlantic	Continental Airlines	Copa Airlines	Delta Airlines	Other Air	Private Air	SouthWest Airlines	Taca Air	Tropic Air	US Airways	Annual
January														
No Stated Visitor Type		129			90		75		9		19	38	2	362
Resident	4	1166			781		401	2	13		334	187	31	2919
Same Day Visitor		35			31		21		57		19	59		222
Stay Over Visitor	14	7333		7	7117		5473	2	279		968	671	522	22386
February														
No Stated Visitor Type		217			152		97	6	57		29	80	13	651
Resident	1	871			550		206		24		339	205	13	2209
Same Day Visitor		37			28		19		86		20	83		273
Stay Over Visitor	112	7386			8486		4454	4	273		1285	462	537	22999
March														
No Stated Visitor Type		369			319		149		90		73	76	14	1090
Resident		1256			803		288	1	76		485	286	19	3214
Same Day Visitor	2	76			67		48	9	62		39	122	1	426
Stay Over Visitor	4	8907			12222		5162	38	352		1642	504	675	29506
April														
No Stated Visitor Typ	6	296		1	316		130		92		67	50	3	961
Resident	1	1298		16	971		320		17		485	344	9	3461
Same Day Visitor		24			51		21		36		18	66		216
Stay Over Visitor	18	5984		24	8090		3767		204		1173	415	308	19983
May														
No Stated Visitor Type		274			297		144		62		56	51		884
Resident		1550			957		376		15		405	313	14	3630
Same Day Visitor		29			24		17		31		19	63		183
Stay Over Visitor	5	5964			6976		3861		303		1014	305	56	18484
June														
No Stated Visitor Type		444			386		155	16	64		62	47	5	1179
Resident		1771			1087		377	2	5		433	271	10	3956
Same Day Visitor		48			44		21	2	38		28	60		241
Stay Over Visitor		8797			7786		4061	89	203		1057	300	142	22435
July														
No Stated Visitor Typ	14	595			546		233		58		74	68	5	1593
Resident	8	2176			1211		514		14		443	303	33	4702
Same Day Visitor		48			106		27		40		66	95	3	385
Stay Over Visitor	9	8795			7732		4486		167		911	335	348	22783
August														
No Stated Visitor Type		333			281		195		33		44	52	20	958
Resident	4	2950			2051		847		12		501	270	43	6678
Same Day Visitor		13			31		21		56		54	86	1	262
Stay Over Visitor	19	4390			5378		3810		190		960	333	303	15383
September														
No Stated Visitor Typ	15	252			253		165		22		40	69		816
Resident		1363			1036		573		6		437	224		3639
Same Day Visitor		14			14		9		19		22	65		143
Stay Over Visitor	4	2109			2861		2497		193		700	267		8631
October														
No Stated Visitor Typ	2	330			374		182		40		69	57	89	1143
Resident	1	1347			992		294		7		141	408	260	3450
Same Day Visitor		40			46		27		14		3	34	28	192
Stay Over Visitor	15	3581			4365		3056		194		1733	847	285	14076
November														
No Stated Visitor Typ	14	380			321		137		46		117	56	97	1168
Resident	1	1617			1046		323		1		264	388	279	3919
Same Day Visitor	2	45			56		27		26		7	19	47	229
Stay Over Visitor	11	7096			6768		3418		222		2842	1099	455	21911
December														
No Stated Visitor Type		508			546		25	201	92		187	69	102	1730
Resident	2	2299			1744		107	515	35		454	238	342	5738
Same Day Visitor		81			153		11	40	60		11	32	106	494
Stay Over Visitor	11	8994			11182		136	4592	321		3219	1042	585	30194
Grand Total	299	103617	41	7	106724	279	55832	171	4316	9047	18610	9900	3244	312087



SECTION III

*Visitor Expenditure,
Motivation Et Satisfaction
(vems) Survey Statistics*



SECTION III

VISITOR EXPENDITURE, MOTIVATION & SATISFACTION (VEMS) SURVEY STATISTICS



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; and
- 4. Obtain a profile of our visitors.

The 2015 VEMS was contracted out to the Statistical Institute of Belize on behalf of the Belize Tourism Board and the Central Bank of Belize. Interviewers were stationed at the three main ports of entry: the Philip 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 2015.

Unless assistance was requested, the questionnaire was self-

administered and returned to interviewers. Administering the survey has proven 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 answer the survey questions. Consequently, there has been much greater success in terms of data collection at the International airport compared to the other two land borders.

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 second version of the VEMS questionnaire addresses issues related more to expenditure and multiple entry visits. This is a shorter form. 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 annual overnight tourist expenditure figure.



TABLE 3.1 SURVEYS COMPLETED BY BORDER STATION

	Frequency	Percent
Philip Goldson International Airport (PGIA)	2925	81.5
Santa Elena Northern Border (SEB)	182	5.1
Benque Viejo Western Border (BVWB)	482	13.4
Total	3589	100

TABLE 3.2 MODE OF ARRIVAL ON THIS TRIP

Mode of Arrival	Frequency	Percent
Air	2782	79.4
Land	586	16.7
Sea	50	1.4
Not Stated	3	0.1
Other	82	2.3
Total	3503	100

Steps need to be taken to increase the number of visitor surveys collected at the northern border. 12% of overnight visitors come through the northern port annually, exceeding the number of visitors passing through the Western border. However, this is not reflected in the number of surveys collected at the border. In 2015, only 5.1% of visitor surveys collected were from the northern border.

VISITOR EXPENDITURE, MOTIVATION & SATISFACTION (VEMS) SURVEY STATISTICS

TABLE 3.3 SURVEYS COLLECTED BY PORT OF ENTRY BY MONTH

Month	Philip Goldson Int'l Airport (PGIA)	Santa Elena Northern Border (SEB)	Benque Viejo Western Border (BVWB)	Total	Percent
January	231	17	37	285	7.9
February	296	10	58	364	10.1
March	363	9	45	417	11.6
April	304	14	35	353	9.8
May	250	16	36	302	8.4
June	269	21	41	331	9.2
July	246	16	45	307	8.6
August	194	18	49	261	7.3
September	141	15	21	177	4.9
October	150	13	22	185	5.2
November	224	14	44	282	7.9
December	257	19	49	325	9.1
TOTAL	2925	182	482	3589	100

TABLE 3.4 OVERNIGHT VISITORS BY COUNTRY/REGION OF ORIGIN

Country/Region	Frequency	Percent
USA	6716	68.3
Canada	865	8.8
Europe	1404	14.3
Caribbean	44	0.4
Central America	145	1.5
DK/NS	1	0
Other	659	6.7
Total	9834	100

In previous years, the main state of origin for U.S. visitors to Belize vacillated between Texas and California. This year's survey result shows the visitors from Texas outnumbering visitors from California by a wider margin than in previous years. This may be partly due to an increase in the number of airline gateways connecting Belize to Houston, since Southwest Airlines started flying to Belize from Houston in the third quarter of 2015.

VISITOR EXPENDITURE, MOTIVATION & SATISFACTION (VEMS) SURVEY STATISTICS

TABLE 3.5 OVERNIGHT VISITORS BY U.S. STATE

U.S. State	Frequency	Percent
ALABAMA	49	0.73
ALASKA	27	0.4
ARIZONA	143	2.13
ARKANSAS	60	0.89
CALIFORNIA	897	13.36
COLORADO	330	4.91
CONNECTICUT	55	0.82
DELAWARE	10	0.15
DISTRICT OF COLOMBIA	54	0.8
FLORIDA	258	3.84
GEORGIA	136	2.03
HAWAII	14	0.21
IDAHO	43	0.64
ILLINOIS	230	3.42
INDIANA	82	1.22
IOWA	56	0.83
KANSAS	66	0.98
KENTUCKY	51	0.76
LOUISIANA	98	1.46
MAINE	21	0.31
MARYLAND	75	1.12
MASSACHUSETTS	121	1.8
MICHIGAN	118	1.76
MINNESOTA	101	1.5
MISSISSIPPI	56	0.83
MISSOURI	90	1.34

MONTANA	44	0.66
NEBRASKA	49	0.73
NEVADA	60	0.89
NEW HAMPSHIRE	29	0.43
NEW JERSEY	90	1.34
NEW MEXICO	54	0.8
NEW YORK	307	4.57
NORTH CAROLINA	132	1.97
NORTH DAKOTA	10	0.15
OHIO	133	1.98
OKLAHOMA	92	1.37
OREGON	141	2.1
PENNSYLVANIA	144	2.14
RHODE ISLAND	12	0.18
SOUTH CAROLINA	57	0.85
SOUTH DAKOTA	11	0.16
TENNESSEE	101	1.5
TEXAS	1186	17.66
UTAH	64	0.95
VERMONT	11	0.16
VIRGINIA	124	1.85
WASHINGTON	216	3.22
WEST VIRGINIA	12	0.18
WISCONSIN	102	1.52
WYOMING	38	0.57
Not Stated	256	3.81
TOTAL	6716	100

VISITOR EXPENDITURE, MOTIVATION & SATISFACTION (VEMS) SURVEY STATISTICS

TABLE 3.6 OVERNIGHT VISITORS BY EUROPEAN COUNTRY

European Country	Frequency	Percent
FRANCE	120	8.5
GERMANY	212	15.1
HOLLAND	85	6.1
IRELAND	43	3.1
ITALY	79	5.6
NORWAY	21	1.5
SPAIN	54	3.8
SWITZERLAND	54	3.8
UNITED KINGDOM	507	36.1
OTHER	218	15.5
NOT STATED	11	0.8
Total	1404	100

TABLE 3.7 OVERNIGHT VISITORS BY CANADIAN PROVINCE

Canadian Province	Frequency	Percent
ALBERTA	280	32.4
BRITISH COLUMBIA	217	25.1
MANITOBA	23	2.7
NEWBRUNSWICK	7	0.8
NEWFOUNDLAND and LABRADOR	8	0.9
NORTHWEST TERRITORIES	5	0.6
NOVA SCOTIA	17	2
NUNAVUT	0	0
ONTARIO	155	17.9
PRINCE EDWARD ISLAND	2	0.2
QUEBEC	59	6.8
SASKATCHEWAN	45	5.2
YUKON	3	0.3
Not Stated	44	5.1
Total	865	100

VISITOR EXPENDITURE, MOTIVATION & SATISFACTION (VEMS) SURVEY STATISTICS

**TABLE 3.8 OVERNIGHT VISITORS BY PURPOSE OF VISIT,
BY COUNTRY/REGION OF ORIGIN**

Country/Region	Leisure	Percent	Business	Percent2	Friends	Percent3	Religion	Percent4	Not Stated	Percent5	Other	Percent6	Total
USA	5873	82.10%	302	4.20%	336	4.70%	432	6.00%	4	1.00%	203	2.80%	7150
Canada	858	88.50%	23	2.40%	44	4.50%	25	2.60%	0	0.00%	19	2.00%	969
Europe	1118	95.10%	25	2.10%	18	1.50%	2	0.20%	0	0.00%	12	1.00%	1175
Caribbean	12	15.80%	42	55.30%	5	6.60%	12	15.80%	0	0.00%	5	6.60%	76
Central America	64	64.00%	19	19.00%	7	7.00%	5	5.00%	0	0.00%	5	5.00%	100
DK/ NS	0	0.00%	1	50.00%	1	50.00%	0	0.00%	0	0.00%	0	0.00%	2
Other	440	90.90%	19	3.90%	12	2.50%	4	0.80%	1	2.00%	8	1.70%	484

Tourist visitors from the major market regions mainly come to Belize for the purpose of leisure. The leisure category of visitors makes up the bulk of tourist visitor traffic to Belize. The next popular reason for visitors from the major market countries to travel to Belize is to visit friends or relatives.

**TABLE 3.9 AVERAGE LENGTH OF STAY
(NIGHTS) BY COUNTRY OF RESIDENCE
AND SEASON**

Country/ Region	SUMMER	WINTER	Average
USA	6.73	7.01	6.87
Canada	7.77	8.45	8.21
Europe	5.36	5.98	5.67
Caribbean	4.41	5	4.67
Central America	4.74	4.2	4.52
DK/NS	1	0	1
Other	4.4	5.01	4.63
Average	6.31	6.85	6.58

**TABLE 3.10 AVERAGE LENGTH OF STAY
(NIGHTS) BY PURPOSE OF VISIT
AND SEASON**

Purpose & Season	SUMMER	WINTER	Average
Holiday, Leisure	6.23	6.82	6.53
Business	4.85	4.38	4.66
Visit Friends	8.18	8.59	8.37
Religion	7.33	7.72	7.52
DK/NS	7	6.33	6.6
Other	5.58	6.74	6.08
Average	6.31	6.85	6.58

VISITOR EXPENDITURE, MOTIVATION & SATISFACTION (VEMS) SURVEY STATISTICS

The bulk of visitors who travel to Belize from the Caribbean, come for business purposes. As a result, the average length of stay for visitors from the Caribbean region is rather short, compared to those visitors who come from other regions mainly for leisure purposes. Persons visiting friends and relatives, along with persons visiting for religious purposes averaged among the longest length of stay periods of all categories.

A major component of Belize's tourism product offer is known as "Adventure Tourism". This type of tourism involves aquatic activities, as well as jungle and cave exploration. These are the kind of activities that younger travelers tend to find quite appealing. This is reflected by the numbers in table 3.11, in which the majority of visitors surveyed were between the ages of 25 – 34.

TABLE 3.11 SEX BY AGE GROUP OF RESPONDENTS

Age Group	Male	Percent	Female	Percent2	DK/NS	Total	Percent Total
LESS THAN 25	197	14.5	421	19.7	1	619	17.7
25-34	476	35.1	812	38	2	1290	36.8
35-44	265	19.5	308	14.4	2	575	16.4
45-54	218	16.1	336	15.7	1	555	15.8
55-64	149	11	187	8.8	1	337	9.6
65 AND OVER	52	3.8	73	3.4	2	127	3.6

Tourist visitors who are from Belize's major market regions such as the United States, Canada, and Europe mostly travel to the country as couples. The second most common travel group among persons from the major market countries, consists of those who travel with friends. This coincides with the results that most visitors to Belize come for the purpose of leisure. Those visitors from the Caribbean and Central America usually travel to Belize alone or with a group of friends, and come mostly for business.

TABLE 3.12 OVERNIGHT VISITORS BY TRAVEL COMPANION(S) BY COUNTRY/REGION OF ORIGIN

Country/Region	Nobody	Spouse	Family	Group/Friends	DK/NS	Other	Total
USA	263	932	495	698	0	32	2420
CANADA	50	134	41	99	0	1	325
EUROPE	92	156	36	194	0	6	484
CARIBBEAN	5	0	1	0	0	1	7
CENTRAL AMERICA	13	4	7	14	0	3	41
OTHER	43	68	14	98	1	2	226
PERCENT	13.3	36.9	17	31.5	0	1.3	100

VISITOR EXPENDITURE, MOTIVATION & SATISFACTION (VEMS) SURVEY STATISTICS

TABLE 3.13 % OVERNIGHT VISITORS BY COUNTRY/REGION OF ORIGIN BY TYPE OF ACCOMMODATION

Type of Accommodation	USA	CANADA	EUROPE	CARIBBEAN	CENTRAL AMERICA	OTHER	Average
Hotel/Resort	72.90%	64.30%	57.90%	71.40%	82.90%	63.70%	69.50%
Guest-House	15.00%	32.00%	43.20%	14.30%	2.40%	29.60%	21.30%
Own Vacation House	2.20%	2.80%	0.60%	0.00%	0.00%	0.00%	1.90%
Rented House/Apartment	9.90%	13.80%	2.50%	0.00%	7.30%	4.00%	8.80%
Friend/Relative	5.80%	12.60%	4.30%	0.00%	12.20%	4.00%	6.20%
Fishing Lodge	1.20%	0.30%	0.60%	0.00%	4.90%	0.40%	1.00%
Boat	2.50%	1.20%	1.40%	14.30%	2.40%	4.90%	2.40%
Camping	2.40%	2.50%	4.30%	0.00%	2.40%	4.00%	2.80%
Time-share Unit	0.80%	0.90%	0.40%	0.00%	0.00%	0.00%	0.70%
Other	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
DK/NS	0.10%	0.00%	0.20%	0.00%	0.00%	0.40%	0.10%

TABLE 3.14 OVERNIGHT VISITORS BY COUNTRY/REGION OF ORIGIN BY AREA STAYED IN COUNTRY

Area Stayed In	USA	CANADA	EUROPE	CARIBBEAN	CENTRAL AMERICA	OTHER	Average
Belmopan	6.90%	6.50%	5.40%	42.90%	7.30%	2.70%	6.50%
Belize District	15.30%	15.40%	15.90%	42.90%	24.40%	14.20%	15.50%
Corozal	3.00%	4.30%	7.40%	0.00%	9.80%	5.30%	3.90%
Orange Walk	3.80%	4.00%	6.00%	0.00%	4.90%	3.50%	4.10%
San Ignacio/Cayo	21.20%	29.50%	32.40%	0.00%	22.00%	34.50%	24.30%
Dangriga/Stann Creek	12.40%	17.20%	8.30%	0.00%	4.90%	6.20%	11.80%
Punta Gorda/Toledo	3.90%	3.70%	4.30%	0.00%	2.40%	2.20%	3.80%
Ambergris Caye	47.40%	40.90%	18.80%	0.00%	26.80%	21.20%	40.80%
Caye Caulker	18.50%	42.50%	73.80%	14.30%	29.30%	68.60%	31.70%
Other Islands	8.00%	4.90%	7.40%	0.00%	4.90%	4.90%	7.40%
Placencia	12.50%	20.90%	12.40%	28.60%	7.30%	8.80%	13.00%
Other	0.50%	0.30%	0.00%	0.00%	0.00%	0.00%	0.40%
DK/NS	0.20%	0.00%	0.00%	0.00%	0.00%	0.40%	0.10%

VISITOR EXPENDITURE, MOTIVATION & SATISFACTION (VEMS) SURVEY STATISTICS

Close to 74% of European visitors stayed in Caye Caulker. This was by far the highest percentage of any nationality listed in this table. This percentage appears to be even more pronounced when one considers that this is a multiple response question and the second most popular destination of choice for Europeans was Cayo at just 32.4%. Ambergris Caye was a very popular destination among visitors from the United States, accounting for over 47% of all American visitors to that region in 2015. The second most popular destination among U.S. visitors was Cayo, receiving a little over 21% of American overnight guests in 2015.

TABLE 3.15 RATING OF SOURCES OF INFORMATION ABOUT BELIZE

Country /Region	Travel Agent	Magazine	Travel Guide Book	Television	Friends	Internet	DK/NS	Other	Total
USA	155	31	99	17	1051	760	11	296	2420
CANADA	8	6	19	2	156	102	0	32	325
EUROPE	57	15	99	4	147	129	2	31	484
CARIBBEAN	0	0	0	0	0	2	1	4	7
CENTRAL AMERICA	11	1	0	0	15	7	1	6	41
DK/NS	0	0	0	0	0	0	0	0	0
OTHER	38	3	31	3	74	60	3	14	226
PERCENT	7.7	1.6	7.1	0.7	41.2	30.3	0.5	10.9	100

TABLE 3.16 % OVERNIGHT VISITORS BY FIRST TIME VISITING

FIRST VISIT?	USA	CANADA	EUROPE	CARIBBEAN	CENTRAL AMERICA	DK/NS	OTHER	Percent TOTAL
YES	76.60%	79.40%	94.60%	0.00%	36.60%	0.00%	88.90%	79.50%
NO	23.30%	20.60%	5.40%	100.00%	63.40%	0.00%	11.10%	20.40%

Over 79% of overnight tourist visitors interviewed were on their first visit to the country. Notably, the majority of visitors from Belize’s main market countries were also first time visitors to the country. On the other hand, visitors to Belize from Central America and the Caribbean were mainly repeat visitors.

VISITOR EXPENDITURE, MOTIVATION & SATISFACTION (VEMS) SURVEY STATISTICS

TABLE 3.17 MODE OF ARRIVAL FOR REPEAT VISITORS

Country/Region	Air	Land	Cruise ship	DK/NS	Other	Total
USA	541	19	2	1	2	565
Canada	57	10	0	0	0	67
Europe	7	17	0	0	2	26
Caribbean	7	0	0	0	0	7
Central America	12	14	0	0	0	26
Other	6	18	0	0	1	25
Total	630	78	2	1	5	716
Total Percent	88.00%	10.90%	0.30%	0.10%	0.70%	100.00%

Over 70% of survey respondents claimed to have engaged in snorkeling in 2015, thus illustrating the popularity of marine attractions and marine-related activities in Belize. Jungle Trekking and Diving are also very popular activities for tourist visitors in Belize, accounting for 33.3% and 30.6% of all major activities of choice, respectively.

TABLE 3.18 MULTIPLE DESTINATIONS VISITED BY COUNTRY/REGION OF ORIGIN

ORIGIN COUNTRY	NO	YES	TOTAL
USA	6072	644	6716
Canada	755	110	865
Europe	1087	317	1404
Caribbean	42	2	44
Central America	127	18	145
DK/NS	0	1	1
Other	556	103	659
Total	8639	1195	9834
Total Percent	87.80%	12.20%	100.00%

TABLE 3.19 PARTICIPATION IN ACTIVITIES BY COUNTRY/REGION OF ORIGIN (%)

Activity	USA	CANADA	EUROPE	CARIBBEAN	CENTRAL AMERICA	OTHER	Average
Diving	30.70%	27.10%	35.30%	0.00%	17.10%	27.00%	30.60%
Snorkeling	69.70%	73.20%	76.70%	0.00%	43.90%	70.80%	70.60%
Island Tour	26.80%	26.80%	26.70%	28.60%	29.30%	22.60%	26.50%
Caving	31.80%	34.20%	19.80%	14.30%	17.10%	16.80%	29.20%
Birding	8.30%	10.20%	9.10%	0.00%	0.00%	4.00%	8.20%
Gaming	1.50%	0.30%	0.00%	0.00%	7.30%	0.00%	1.10%
Fishing	23.50%	20.00%	9.10%	0.00%	14.60%	11.10%	20.20%
Sailing	14.00%	12.30%	11.60%	0.00%	12.20%	11.10%	13.30%
Canoe/Kayaking	25.60%	27.10%	22.50%	0.00%	17.10%	14.20%	24.40%
Jungle Trekking	36.30%	36.30%	25.80%	14.30%	22.00%	15.90%	33.30%
Cultural Event	10.50%	11.10%	7.40%	0.00%	4.90%	4.00%	9.60%
Other	14.70%	12.00%	5.20%	14.30%	12.20%	4.40%	12.40%
None	6.20%	8.00%	5.40%	57.10%	26.80%	9.30%	6.80%
DK/NS	0.30%	0.60%	1.40%	0.00%	0.00%	3.10%	0.70%

VISITOR EXPENDITURE, MOTIVATION & SATISFACTION (VEMS) SURVEY STATISTICS

TABLE 3.20 PARTICIPATION IN ACTIVITIES BY TOP 10 U.S. STATES (%)

Activity	ARIZONA	CALIFORNIA	COLORADO	FLORIDA	ILLINOIS	NEW YORK	OREGON	TEXAS	WASHINGTON	WISCONSIN	Average
Diving	33.30%	32.70%	42.60%	35.30%	22.40%	29.90%	30.00%	26.90%	31.60%	23.70%	31.00%
Snorkeling	61.90%	73.10%	73.10%	47.10%	76.50%	70.10%	76.00%	68.20%	77.60%	73.70%	69.80%
Island Tour	35.70%	24.60%	19.40%	22.10%	25.90%	22.40%	26.00%	29.40%	32.90%	31.60%	26.90%
Caving	31.00%	41.10%	30.60%	20.60%	29.40%	37.40%	40.00%	23.40%	35.50%	26.30%	31.90%
Birding	4.80%	7.40%	11.10%	4.40%	10.60%	4.70%	20.00%	5.60%	15.80%	10.50%	8.20%
Gaming	2.40%	2.30%	0.00%	1.50%	1.20%	0.90%	2.00%	1.90%	1.30%	0.00%	1.40%
Fishing	28.60%	15.90%	22.20%	20.60%	20.00%	14.00%	30.00%	33.90%	26.30%	31.60%	23.30%
Sailing	9.50%	12.90%	13.00%	10.30%	15.30%	8.40%	14.00%	15.00%	18.40%	15.80%	14.10%
Canoe/Kayaking	19.00%	28.50%	24.10%	25.00%	36.50%	24.30%	40.00%	22.40%	25.00%	23.70%	25.60%
Jungle Trekking	38.10%	43.00%	40.70%	26.50%	42.40%	35.50%	46.00%	28.00%	38.20%	26.30%	36.50%
Cultural Event	4.80%	9.10%	13.00%	5.90%	12.90%	10.30%	26.00%	7.70%	11.80%	13.20%	10.30%
Other	7.10%	17.20%	14.80%	10.30%	10.60%	16.80%	14.00%	15.00%	15.80%	15.80%	14.80%
None	4.80%	5.80%	6.50%	10.30%	4.70%	6.50%	0.00%	6.30%	2.60%	2.60%	6.20%
DK/NS	0.00%	0.00%	0.00%	1.50%	1.20%	1.90%	0.00%	0.00%	0.00%	0.00%	0.30%

TABLE 3.21 PLACES OF INTEREST VISITED BY COUNTRY/REGION OF ORIGIN (%)

Places of Interest	USA	CANADA	EUROPE	CARIBBEAN	CENTRAL AMERICA	OTHER	Average
Offshore Islands	44.80%	42.50%	34.70%	14.30%	31.70%	35.40%	42.40%
Barrier Reef	53.80%	57.20%	57.40%	0.00%	24.40%	47.30%	53.80%
Blue Hole	8.50%	8.00%	14.00%	0.00%	12.20%	15.00%	9.60%
Archaeological sites	41.70%	43.10%	28.50%	28.60%	24.40%	20.80%	38.40%
Marine protected Areas	42.10%	48.00%	40.50%	0.00%	24.40%	43.40%	42.20%
National Park/Reserve	41.20%	47.10%	27.30%	0.00%	26.80%	20.40%	38.20%
Museum/Historical site	20.00%	23.10%	12.80%	0.00%	4.90%	8.40%	18.30%
Other	3.90%	4.60%	1.40%	0.00%	2.40%	1.80%	3.50%
None	9.70%	10.80%	10.30%	57.10%	36.60%	13.70%	10.50%
DK/NS	1.00%	1.20%	1.70%	0.00%	2.40%	3.10%	1.30%

VISITOR EXPENDITURE, MOTIVATION & SATISFACTION (VEMS) SURVEY STATISTICS

TABLE 3.22 PREPAID VS. NON-PREPAID PACKAGE BY COUNTRY REGION OF ORIGIN (US\$)

	NONPREPAID		PREPAID		TOTAL
	Number	Percent	Number	Percent	Number
USA	4359	64.90%	2357	35.10%	6716
Canada	621	71.80%	244	28.20%	865
Europe	1009	71.90%	395	28.10%	1404
Caribbean	36	81.80%	8	18.20%	44
Central America	106	73.10%	39	26.90%	145
DK/NS	1	100.00%	0	0.00%	1
Other	497	75.40%	162	24.60%	659
Total	6629	67.40%	3205	32.60%	9834

TABLE 3.23 PREPAID PACKAGE COST BY COMPONENTS (%)

TRANSPORTATION	INSURANCE	OTHER	TOTAL PACKAGE COST
39.50%	2.20%	58.30%	100%

TABLE 3.24 PREPAID PACKAGE COST BY COUNTRY/REGION OF ORIGIN AND SEASONS (US\$)

Country/ Region	Summer	Winter	Average
USA	2,765.36	3,008.80	2,888.80
CANADA	3,106.29	2,825.62	2,906.64
EUROPE	2,375.21	3,140.81	2,706.28
CARIBBEAN	3,083.33	1,100.00	2,290.00
CENTRAL AMERICA	763.67	927.17	872.67
OTHER	2,235.04	1,872.85	2,114.31
Average	2,719.09	2,941.64	2,833.58

VISITOR EXPENDITURE, MOTIVATION & SATISFACTION (VEMS) SURVEY STATISTICS

TABLE 3.25 PREPAID PACKAGE COSTS – VISITED MULTIPLE DESTINATIONS (US\$)

Visited Multiple Destinations	Summer	Winter	Average
Visit Neighboring Country	2,419.73	3,701.82	3,157.90
Didn't Visit Neighboring Country	2,752.69	2,828.80	2,791.23
Average	2,719.09	2,941.64	2,833.58

TABLE 3.26 AVERAGE DAILY EXPENDITURE (US\$) BY COUNTRY

Country/Region	Summer	Winter	Average
USA	172.15	180.75	176.53
CANADA	142.96	121.2	128.69
EUROPE	95.91	99.57	97.69
CARIBBEAN	218.32	191.61	206.75
CENTRAL AMERICA	119.92	161.58	137.1
Other	103.47	99.09	101.81
Average	151.76	158.43	155.13

TABLE 3.27 AVERAGE DAILY EXPENDITURE (US\$) BY PURPOSE OF VISIT

Purpose of Visit	Summer	Winter	Average
Holiday/leisure	154.41	160.5	157.54
Business	189.15	206.59	196.34
Visit friends	87.06	102.82	94.2
Religion	145.44	140.6	143.08
DK/NS	114.29	104.52	108.43
Other	152.46	152.51	152.48
Average	151.76	158.43	155.13

TABLE 3.28 AVERAGE DAILY EXPENDITURE (US\$) BY COUNTRY/REGION OF ORIGIN AND PURPOSE OF VISIT

Country/ Region	Holiday/Leisure	Business	Visit Friends	Religion	DK/NS	Other	Average
USA	182.51	203.52	100.81	148.08	123.81	178.05	176.53
Canada	132.82	219.58	77.63	71.07	0	48.74	128.69
Europe	97.6	163	37.15	162.22	85.36	96.3	97.69
Caribbean	214.45	208.31	100	0	0	0	206.75
Central America	125.53	186.08	76.43	95.54	0	50	137.1
Other	100.16	153	74.03	0	0	85.21	100
Average	157.55	196.34	94.2	143.08	108.43	152.48	155.13

VISITOR EXPENDITURE, MOTIVATION & SATISFACTION (VEMS) SURVEY STATISTICS

Business visitors from Canada had the highest average daily expenditure out of all categories of visitors. However, business visitors from Canada are very small in number and thus their average expenditure value is not representative of the overall average.

TABLE 3.29 AVERAGE DAILY EXPENDITURE (US\$) BY PURPOSE OF VISIT BY PLACES STAYED

Places Stayed	Holiday/Leisure		Business		Visit Friends		Religion		Other		Average	
	\$	# of Cases	\$	# of Cases	\$	# of Cases	\$	# of Cases	\$	# of Cases	\$	Total # of Cases
Belmopan	156.26	72	80.46	7	20.43	5	143.2	11	145.83	2	142.09	97
Belize District	132.28	171	184.16	13	34.09	24	128.91	19	142.55	3	124.82	230
Corozal	105.58	41	50.93	3	34.01	8	82.38	4	83.33	1	90.64	57
Orange Walk	142.1	43	0	1	31.81	11	114.44	8	-	0	117.08	63
San Ignacio/Cayo	152.78	340	125.52	4	32.57	15	120.18	17	-	0	146.31	377
Dangriga/SC	179.87	190	145.29	5	64.34	6	155.02	5	50	2	173.86	208
Toledo/PG	106.34	37	150	1	54.69	2	112.98	8	166.67	1	107.44	49
Ambergris Caye	182.28	612	143.75	4	101.2	29	79.62	11	120.4	4	176.4	660
Caye Caulker	118.87	467	76.39	2	40.56	11	115.2	14	185	1	116.99	495
Other Islands	184.32	117	-	0	0	1	161.22	6	185	1	181.75	125
Placencia	147.29	184	311.98	4	105.86	8	159.37	7	0	1	148.59	204
DK/NS	166.67	1	-	0	-	0	-	0	-	0	166.67	1

TABLE 3.30 AVERAGE DAILY EXPENDITURE (US\$) BY COUNTRY/REGION OF ORIGIN BY PLACES STAYED

Places Stayed	USA		Canada		Europe		Caribbean		Central America		Other		Total
	\$	# of Cases	\$	# of Cases	\$	# of Cases	\$	# of Cases	\$	# of Cases	\$	# of Cases	\$
Belmopan	159.69	69	135.31	14	44.22	8	91.85	2	0	83.08	4	142.09	
Belize District	139.1	160	86.71	24	79.99	28	219.57	3	235	2	77.23	13	124.82
Corozal	97.84	31	122.45	5	85.17	12	0	0	18.18	1	60.15	8	90.64
Orange Walk	145.77	40	70.33	6	72.51	11	0	0	36.23	2	63.19	4	117.08
San Ignacio/Cayo	170.06	236	93.66	39	117.72	64	0	0	157.95	4	94.26	34	146.31
Dangriga/SC	191.39	161	132.05	28	97.59	13	0	0	0	0	63.84	6	173.86
Toledo/PG	116.01	35	173.2	3	68.43	10	0	0	0	0	0	1	107.44
Ambergris Caye	187.51	540	129.74	63	124.25	34	0	0	77.72	4	129.24	19	176.4
Caye Caulker	141.51	199	106.37	65	94.45	146	250	1	123.59	7	103.01	77	116.99
Other Islands	197.72	94	97.41	9	114.6	16	0	0	191.67	2	259.84	4	181.75
Placencia	166.81	133	97.19	38	117.66	24	133.33	2	366.67	2	121.92	5	148.59
DK/NS	166.67	1	0	0	0	0	0	0	0	0	0	0	166.67

Guests from the United States who visited offshore islands had a very high expenditure, averaging about US \$200.00. There were visitors from other regions with a higher average expenditure per area visited, however those visitor totals were so small in number that they were considered insignificant.

VISITOR EXPENDITURE, MOTIVATION & SATISFACTION (VEMS) SURVEY STATISTICS

TABLE 3.31 SATISFACTION RATINGS OF DIFFERENT ASPECTS OF TRIP

Aspects of Trip	Good	Average	Poor	DK/NS
INTL. AIRLINE CONNECTION	73.40%	21.00%	3.70%	1.90%
IMMIGRATION SERVICES	72.50%	22.50%	4.70%	0.30%
CUSTOMS SERVICES	73.70%	21.90%	3.90%	0.40%
PERSONAL SAFETY	76.70%	21.70%	1.20%	0.40%
ACCOMMODATION	77.90%	20.90%	1.00%	0.30%
RESTAURANTS	74.40%	23.00%	2.30%	0.30%
ENTERTAINMENT	66.90%	27.70%	4.20%	1.20%
TOURS	83.30%	14.80%	1.10%	0.70%
DOMESTIC TRANSPORTATION	62.90%	29.40%	7.20%	0.60%
VALUE FOR MONEY	65.10%	30.30%	4.00%	0.50%
NATIONAL PARKS	86.50%	10.90%	0.40%	2.10%
MARINE ATTRACTIONS	90.60%	7.60%	0.30%	1.40%
ARCHAEOLOGICAL SITES	86.10%	10.90%	0.80%	2.30%

Areas of focus for improvement of Belize’s tourism product include domestic transportation, value for money, and entertainment. Nevertheless, almost 93% of visitors reported that they would recommend Belize to a friend or relative. This is good news, as word of mouth remains the strongest source of information for visitors about Belize.

TABLE 3.32 VISITOR SATISFACTION RATING – RETURN /RECOMMEND

Return/Recommend	Yes	No	Maybe	DK/NS
Return	84.10%	3.50%	12.20%	0.10%
Recommend	92.80%	1.30%	5.70%	0.20%



SECTION IV

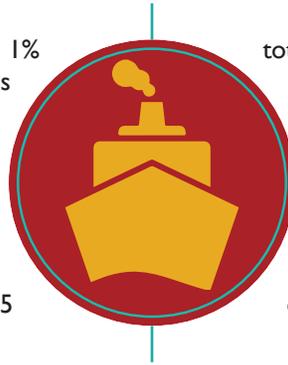
Reports on Belize's Cruise Sector

SECTION IV

REPORTS ON BELIZE'S CRUISE SECTOR



In 2015, there was a slight annual decrease of 1% in the total number of cruise passenger arrivals to Belize as compared to the total number in 2014. However, given that cruise passenger arrivals to Belize in 2014 was at an all-time high and the figure of 2015 was only marginally less, it can be said the cruise sector continued to thrive in 2015 as well. The total number of cruise passenger arrivals to Belize in the year 2015



totalled 957,975 passengers, representing a decrease of just over 10,500 passengers. The largest monthly increase in cruise passenger arrivals occurred in January, with a 16.6% increase over the figure in 2014. In contrast, the largest monthly decrease occurred in October 2015, which saw a 29.2% decrease in cruise arrivals compared to the figure in 2014. Notably, there were 20 fewer cruise ship calls to Belize in 2015 versus 2014.

TABLE 4.1 CRUISE VISITOR ARRIVALS BY MONTH

Month	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	%Change '14 vs '15
January	79,077	95,436	81,649	76,369	94,379	63,835	86,128	102,871	109,251	127,376	16.6
February	77,569	86,010	69,449	68,132	88,492	56,864	70,711	78,766	97,740	95,067	-2.7
March	94,631	95,379	78,847	81,062	104,075	101,728	81,315	82,416	115,227	133,482	15.8
April	62,399	64,079	46,043	64,063	71,087	69,516	57,158	62,643	104,188	91,325	-12.3
May	27,346	29,970	35,215	39,119	39,772	46,182	42,215	33,988	46,842	43,847	-6.4
June	35,335	26,956	26,065	36,812	41,485	53,163	30,798	24,432	53,789	50,790	-5.6
July	29,443	30,478	36,173	43,361	36,630	32,132	35,224	32,874	67,986	54,471	-19.9
August	33,875	17,368	29,785	36,816	38,175	42,495	27,894	36,309	52,037	50,656	-2.7
September	21,431	15,252	29,421	33,092	39,970	33,221	23,877	25,056	47,625	45,265	-5
October	32,551	30,820	32,679	42,663	31,740	39,959	33,388	42,181	57,913	40,985	-29.2
November	74,960	57,551	58,007	64,063	69,934	92,416	69,674	63,583	74,247	81,113	9.2
December	87,314	74,829	74,037	119,667	108,889	96,367	82,352	92,231	141,286	143,598	1.6
TOTAL	655,931	624,128	597,370	705,219	764,628	727,878	640,734	677,350	968,131	957,975	-1

REPORTS ON BELIZE'S CRUISE SECTOR

FIGURE 4.1 CRUISE PASSENGER ARRIVALS BY MONTH

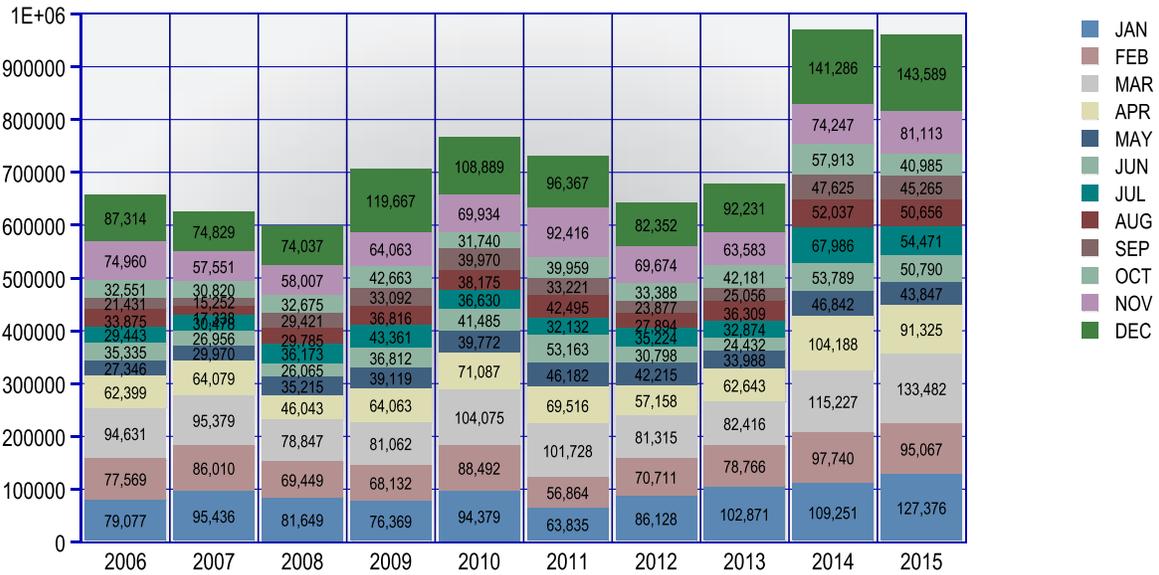


TABLE 4.2 CRUISE VISITOR ARRIVALS BY QUARTER

Quarter	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	%Change '14 vs '15
1st Quarter	251,277	276,825	229,945	225,563	286,946	222,427	238,154	264,053	322,218	355,925	10.5
2nd Quarter	125,080	121,005	107,323	139,994	152,344	168,861	130,171	121,063	204,819	185,962	-9.2
3rd Quarter	84,749	63,098	95,379	113,269	114,775	107,848	86,995	94,239	167,648	150,392	-10.3
4th Quarter	194,825	163,200	164,723	226,393	210,563	228,742	185,414	197,995	273,446	265,696	-2.8
Total	655,931	624,128	597,370	705,219	764,628	727,878	640,734	677,350	968,131	957,975	-1

TABLE 4.3 CRUISE VISITOR ARRIVALS BY SEASON

Season	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	%Change '14 vs '15
Winter	313,676	340,904	275,988	289,626	358,033	291,943	295,312	326,696	426,406	447,250	4.9
Summer	342,255	283,224	321,382	415,593	406,595	435,935	345,422	350,654	541,725	510,725	-5.7
Total	655,931	624,128	597,370	705,219	764,628	727,878	640,734	677,350	968,131	957,975	-1

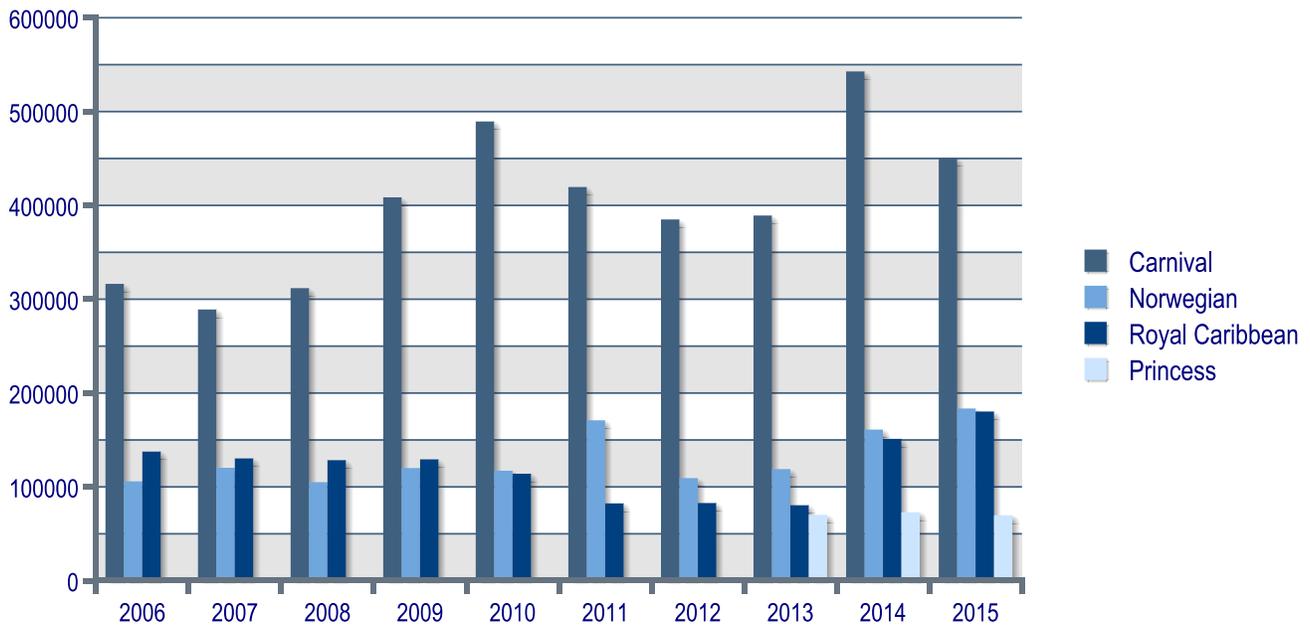
REPORTS ON BELIZE'S CRUISE SECTOR

TABLE 4.4 CRUISE PASSENGERS TO BELIZE BY MAJOR CRUISE LINES

Ships	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	%Change '14 vs '15
Carnival	313,481	286,212	308,993	405,796	486,598	416,788	382,218	386,385	539,960	448,046	-17
Norwegian	102,990	117,439	102,139	117,211	114,376	168,099	106,467	116,131	158,175	180,594	14.2
Royal Caribbean	134,772	127,409	125,598	126,395	111,083	79,551	79,860	77,527	148,281	177,409	19.6
Princess								67,284	70,048	66,825	-4.6

Carnival Cruise Line accounted for over 37% of the total cruise line arrivals in 2015. Norwegian Cruise Line accounted for over 21% of the cruise arrivals in 2014. Royal Caribbean accounted for over 16% of cruise line arrivals to Belize in 2015. The number of cruise ship calls in 2015 for the major cruise lines decreased by 7.1% or 21 calls in 2015 versus 2014.

FIGURE 4.2 CRUISE PASSENGERS TO BELIZE BY MAJOR CRUISE LINES



REPORTS ON BELIZE'S CRUISE SECTOR

TABLE 4.5 CRUISE SHIP CALLS TO BELIZE BY MAJOR CRUISE LINE

Ship calls*	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	%Change '14 vs '15
Carnival	113	103	110	139	155	137	118	118	165	125	-24.2
Norwegian	52	56	47	49	49	76	44	44	64	72	12.5
Royal Caribbean	57	51	49	43	30	22	22	22	44	54	22.7
Princess								21	22	23	4.5
Major Cruise Line Calls	295	278	274	284	278	235	184	184	295	274	-7.1

FIGURE 4.3 CRUISE SHIP CALLS TO BELIZE BY MAJOR CRUISE LINES

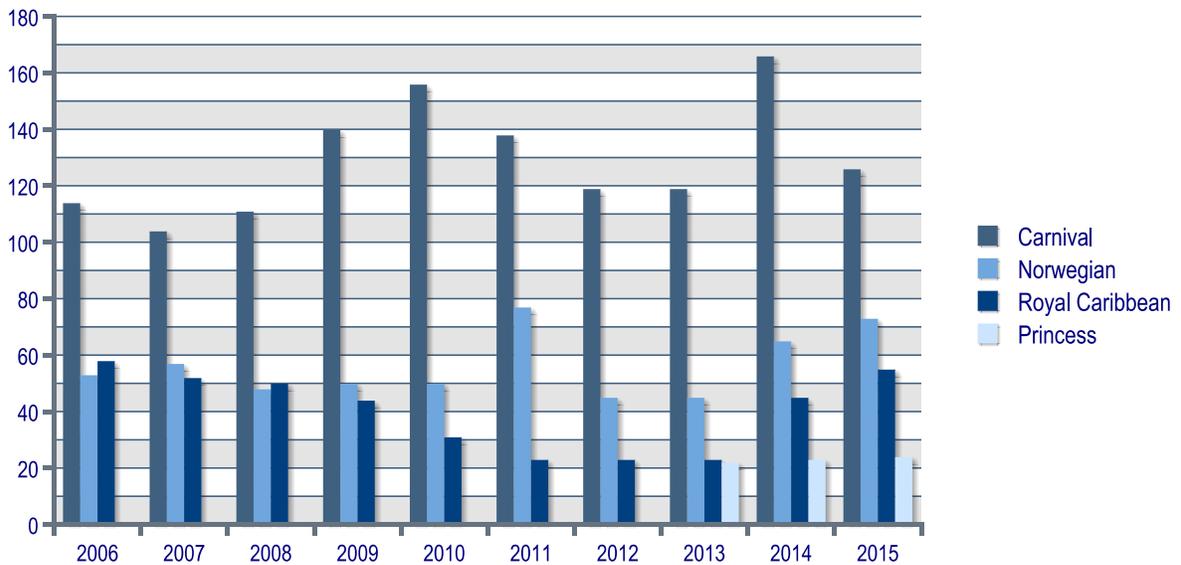
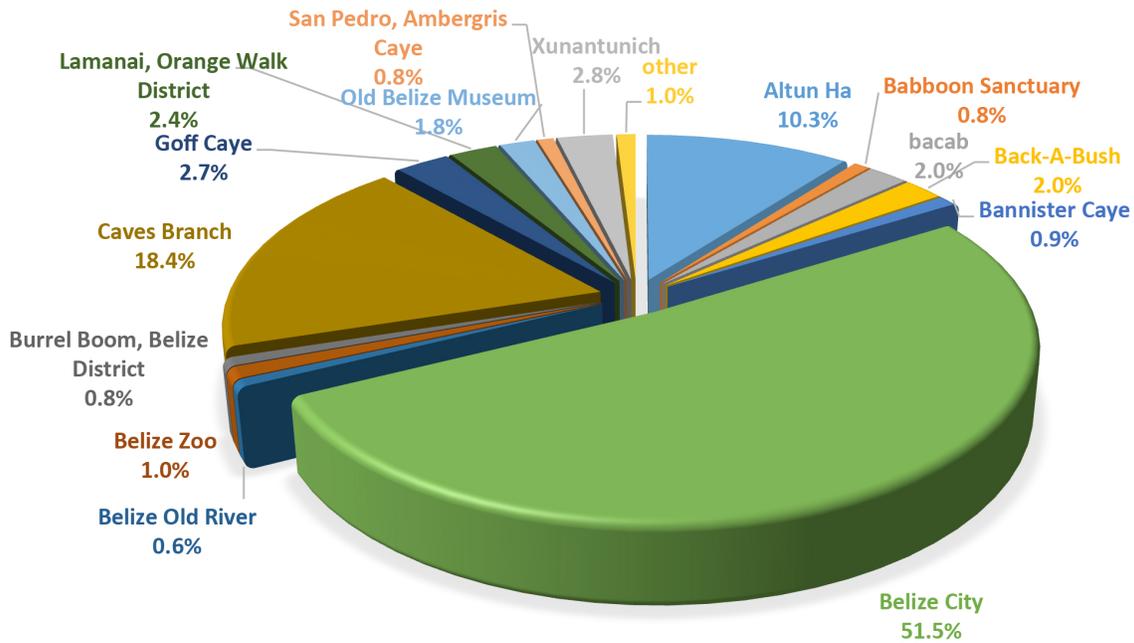


FIGURE 4.4 % CRUISE PASSENGER TOURS IN BELIZE 2014



Belize offers a variety of tour options for cruise visitors to engage in while they are in the country. This is a large part of the reason why the disembarkation rate for Belize is one of the highest in the region for cruise visitors annually. Over the years, the number of cruise passengers who disembark from the vessels and go on tours, has remained relatively high. Most of the attractions visited are relatively close in proximity and includes the Fort Street Tourism Village (FSTV) as well.

In addition, most of the cruise visitors who come to the country go on tours within the city. They may choose to travel on foot or in some type of vehicle. Some of the tourists who travel on foot may also go on other tours outside of the city after they leave the Tourism Village. However, there are

no mechanisms currently in place to track such persons in order to determine exactly where they go once they have left the Tourism Village on foot.

Over 54% of cruise tour activities in 2015 occurred in Belize City. Most of the visitors engaged in these activities in Belize City are classified as “walkers”. However, as mentioned previously, this does not necessarily mean that the visitors did not go on independent tours outside of the Tourism Village. As in years past, Caves Branch was the most popular individual site among cruise passengers, accounting for 17.1% of overall visits. Altun Ha was the second most popular individual site, accounting for 8.6% of cruise passenger visits in 2015.

REPORTS ON BELIZE'S CRUISE SECTOR

FIGURE 4.5 % CRUISE PASSENGERS TOURS IN BELIZE 2015

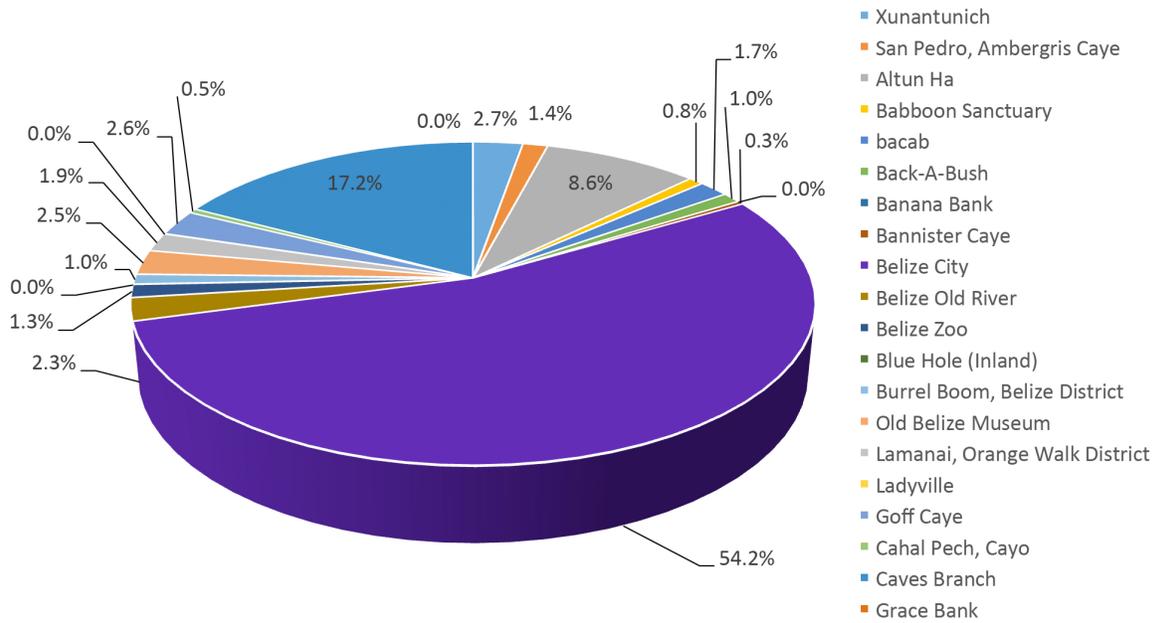
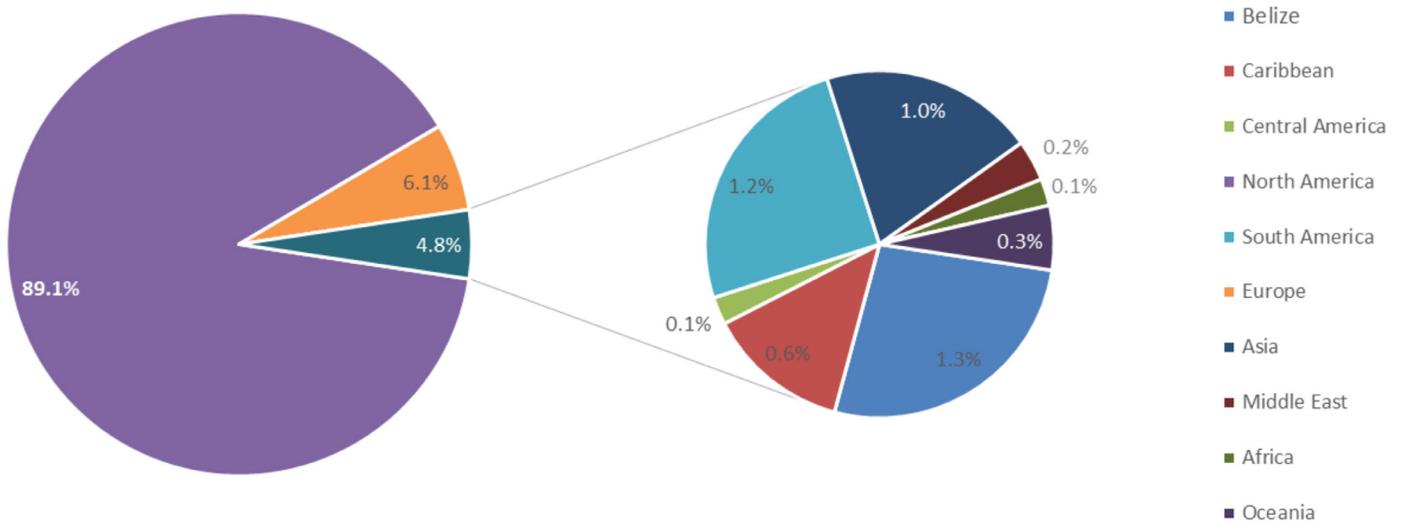


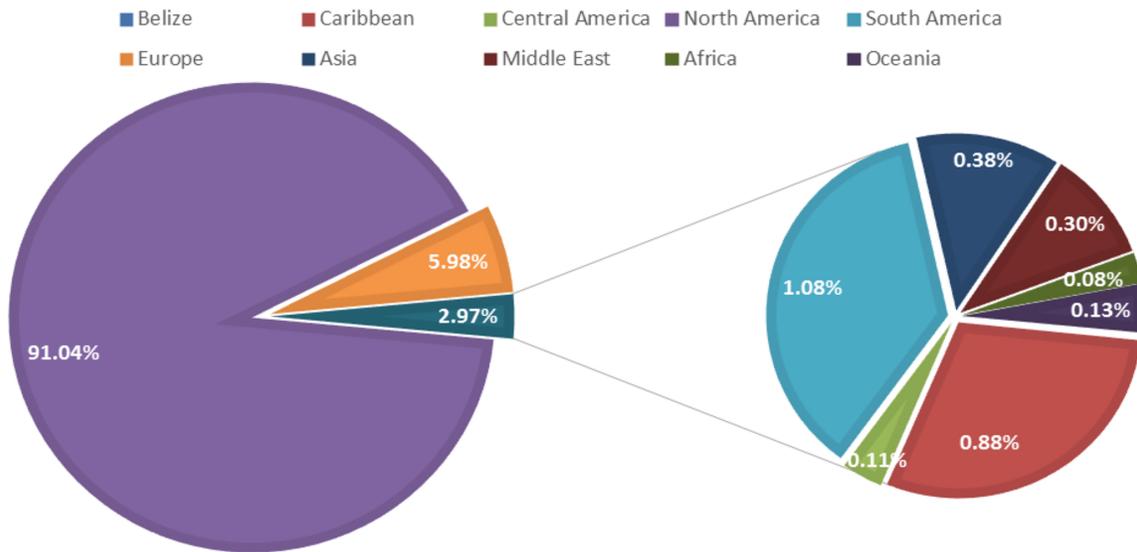
FIGURE 4.6 ORIGIN REGIONS OF VISITORS ON MARINE VESSELS 2014



REPORTS ON BELIZE'S CRUISE SECTOR

Over 91% of cruise passengers and visitors on smaller marine vessels came to Belize from North America, specifically the United States and Canada. This has historically been the case since the development of the cruise tourism sector in Belize. Over 6% of cruise passengers and visitors on smaller marine vessels came to Belize from Europe. Visitors from other regions of the world accounted for close to 5% of the total remaining number of cruise visitors to Belize in 2015.

FIGURE 4.7 ORIGIN REGIONS OF VISITORS ON MARINE VESSELS 2015





SECTION V

Reports on Visists to Belize's Protected Areas Et Archaeological Sites



SECTION V

REPORTS ON VISITS TO BELIZE'S PROTECTED AREAS & ARCHAEOLOGICAL SITES



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

The number of visitors to the Museum of Belize decreased by close to 4,000 persons in 2015. The



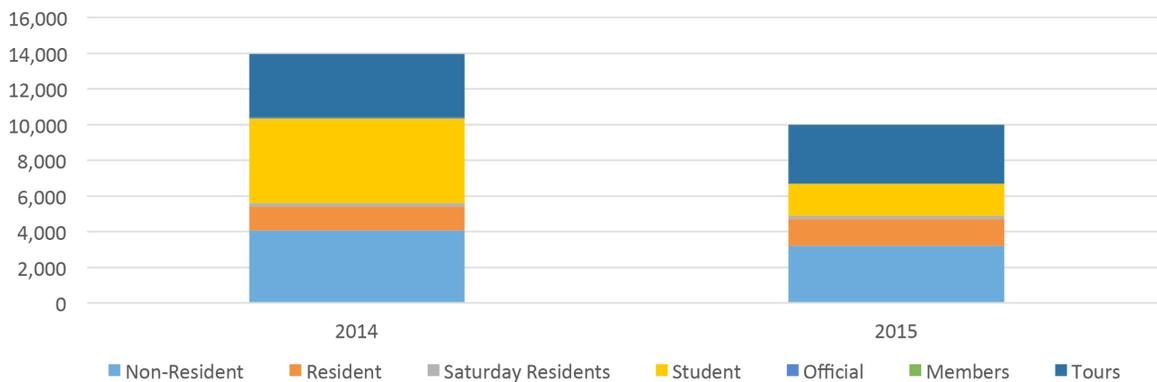
largest decrease occurred among number of students, a figure which decreased by close to 3,000 persons in 2015. The number of non-resident visitors to the museum decreased by 840 in 2015.

In 2015, 32.8% of visitors to the Museum of Belize were persons on a tour, while 32.1% of visitors were non-residents.

TABLE 5.1 ANNUAL VISITORS TO THE MUSEUM OF BELIZE

	Non-Resident	Resident	Saturday Residents	Student	Official	Members	Tours	Total
2014	4,053	1,369	189	4,719	56	3	3,550	13,939
2015	3,213	1,502	181	1,795	6	0	3,282	9,979

FIGURE 5.1 ANNUAL VISITORS TO THE MUSEUM OF BELIZE



The National Institute of Culture & History (NICH) manages the main archaeological sites throughout the country. In 2015, over 55% of the guests to these sites were non-residents. Cruise ship passengers were the second largest type of visitors to archaeological sites at 36.8%. Archaeological sites, particularly the Mayan temple, Altun Ha and Caves branch are the two most popular sites among cruise ship passengers. This is because these sites are in relatively close in proximity to Belize City. Cruise ship passengers can leave Belize City and visit one or two of these sites, and return to the cruise vessel all within a matter of a few hours.

REPORTS ON VISITS TO BELIZE'S PROTECTED AREAS & ARCHAEOLOGICAL SITES

FIGURE 5.2 TYPES OF VISITORS TO ARCHAEOLOGICAL SITES

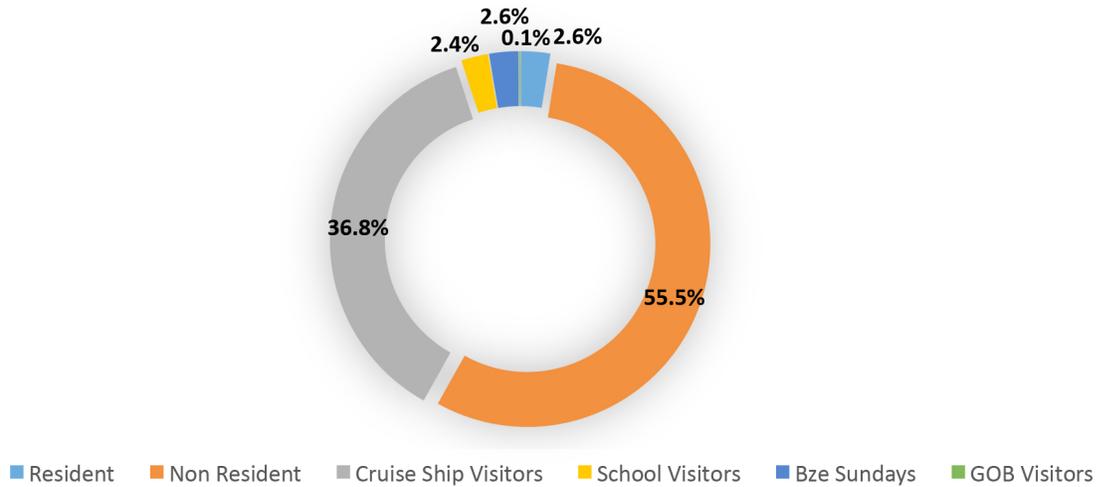
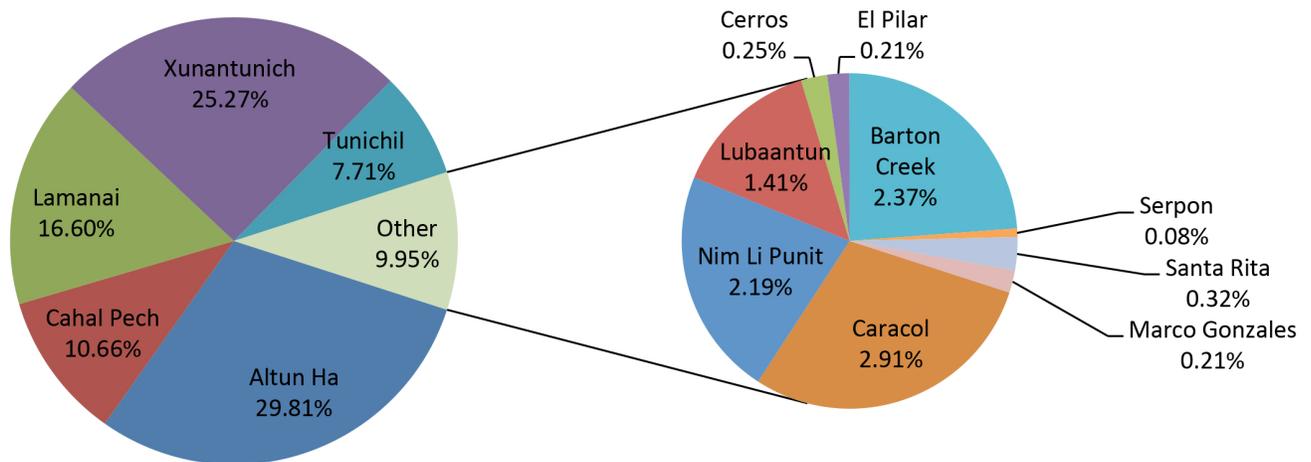


FIGURE 5.3 PERCENTAGE OF VISITORS TO ARCHAEOLOGICAL SITES 2015



REPORTS ON VISITS TO BELIZE'S PROTECTED AREAS & ARCHAEOLOGICAL SITES

The majority of visits to archaeological sites in 2015 took place at the ancient Mayan temples of Altun Ha (29.8%) followed by Xunantunich at 25.3%. In addition, visits to Lamanai accounted for 16.6% of total visits, while Cahal Pech received 10.7% of the total number of visitors. All other archaeological sites individually accounted for less than 10% of the total number of archaeological site visits in 2015.

TABLE 5.2 MONTHLY VISITORS TO THE MAJOR ARCHAEOLOGICAL SITES

Month	2006	2007	2008	2009	2010	2011	2012	2013R	2014R	2015	%Change '15 vs '14
Jan	22,864	25,569	24,826	17,966	19,125	20,933	28,517	33,097	35,793	38,523	7.6
Feb	23,940	24,870	23,941	18,597	19,311	22,148	26,974	31,349	36,500	35,209	-3.5
Mar	29,730	31,703	31,520	24,383	26,892	33,595	35,959	39,762	41,151	45,935	11.6
Apr	23,358	21,321	20,399	16,091	20,365	23,797	25,755	26,619	37,463	32,665	-12.8
May	15,618	16,467	27,735	14,232	20,630	20,212	22,617	28,118	26,793	22,127	-17.4
Jun	16,306	15,374	12,516	13,704	16,271	17,567	22,021	19,498	24,445	23,838	-2.5
Jul	13,634	13,779	14,547	11,247	12,695	14,161	21,599	20,573	24,640	25,524	3.6
Aug	11,772	10,310	11,719	9,018	10,248	13,344	14,975	15,765	19,739	19,975	1.2
Sep	5,346	4,828	6,206	5,974	6,891	7,063	7,991	8,142	10,630	11,755	10.6
Oct	7,255	8,617	6,982	8,736	7,699	8,467	11,604	11,276	13,560	10,188	-24.9
Nov	16,911	17,977	13,870	12,256	14,291	21,371	24,153	19,956	20,611	28,080	36.2
Dec	22,488	23,292	20,814	14,507	26,030	27,110	32,599	29,534	34,936	44,016	26
	209,222	214,107	215,075	166,711	200,448	229,768	274,764	283,689	326,261	337,835	3.5

Historically, the majority of visits to archaeological sites have occurred in the month of March, which is the zenith of the tourism high season in Belize. This was once again the case in 2015, in which there were close to 46,000 visitors to the archaeological sites in March. This figure was a record high for visitor arrivals to archaeological sites in a single month. October had the fewest number of visitors to archaeological sites, with fewer than 10,200 visitors. There was a 3.5% annual increase in visitors to archaeological sites in 2015 compared to the total number of visitors in 2014.

REPORTS ON VISITS TO BELIZE'S PROTECTED AREAS & ARCHAEOLOGICAL SITES

FIGURE 5.4 MONTHLY VISITORS TO THE MAJOR ARCHAEOLOGICAL SITES

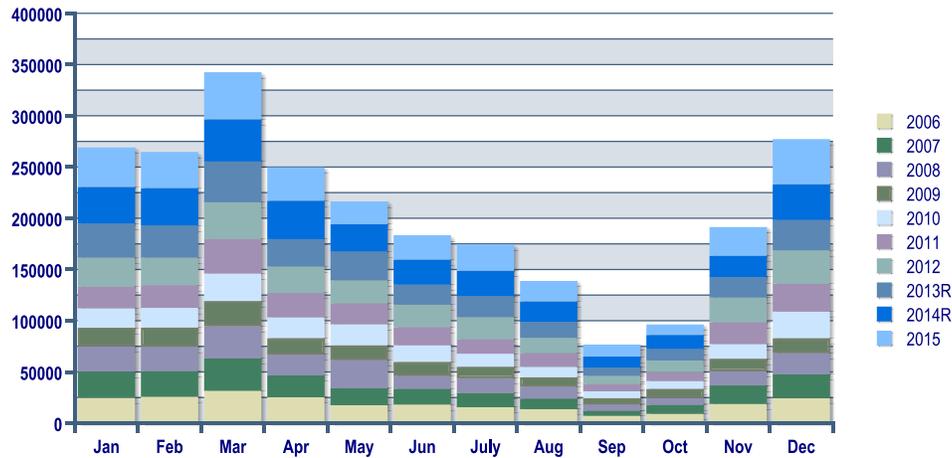


TABLE 5.3 ANNUAL VISITORS TO MAJOR ARCHAEOLOGICAL SITES

	2006	2007	2008	2009	2010	2011	2012	2013R	2014R	2015	%Change '15 vs '14
Altun Ha	74,726	73,375	79,564	74,532	73,691	80,834	83,823	96336	109222	100705	-7.8
Cahal Pech	19,780	15,926	14,103	12,351	15,171	16,746	23,875	25125	27571	36002	30.6
Lamanai	32,157	29,301	31,922	24,057	29,870	39,508	42,483	47298	55283	56084	1.4
Xunantunich	44,198	52,243	48,079	33,018	47,670	51,087	73,932	63944	81000	85384	5.4
Caracol	12,717	14,018	10,795	6,485	8,822	9,119	10,679	11174	10855	9822	-9.5
Nim Li Punit	4,333	4,708	4,586	3,242	4,640	5,136	6,462	7345	6953	7396	6.4
Lubaantun	4,490	4,384	5,301	4,440	4,339	4,847	5,450	5358	5181	4757	-8.2
Cerros	3,380	3,047	2,854	2,640	1,945	2,649	2,923	2842	810	848	4.7
El Pilar	684	708	711	514	533	608	972	411	268	711	165.3
Barton Creek	5,923	5,699	5,154	2,088	4,015	4,418	4,778	5481	5689	8016	40.9
Tunichil Muknal	6,834	10,698	12,006	3,344	9,752	14,816	19,387	17654	21507	26035	21.1
Serpon								79	130	274	110.8
Santa Rita								537	955	1077	12.8
Marco								105	837	724	-13.5
Gonzales											
	209,222	214,107	215,075	166,711	200,448	229,768	274,764	283689	326261	337835	3.5

REPORTS ON VISITS TO BELIZE'S PROTECTED AREAS & ARCHAEOLOGICAL SITES

FIGURE 5.5 ANNUAL VISITORS TO THE MAJOR ARCHAEOLOGICAL SITES

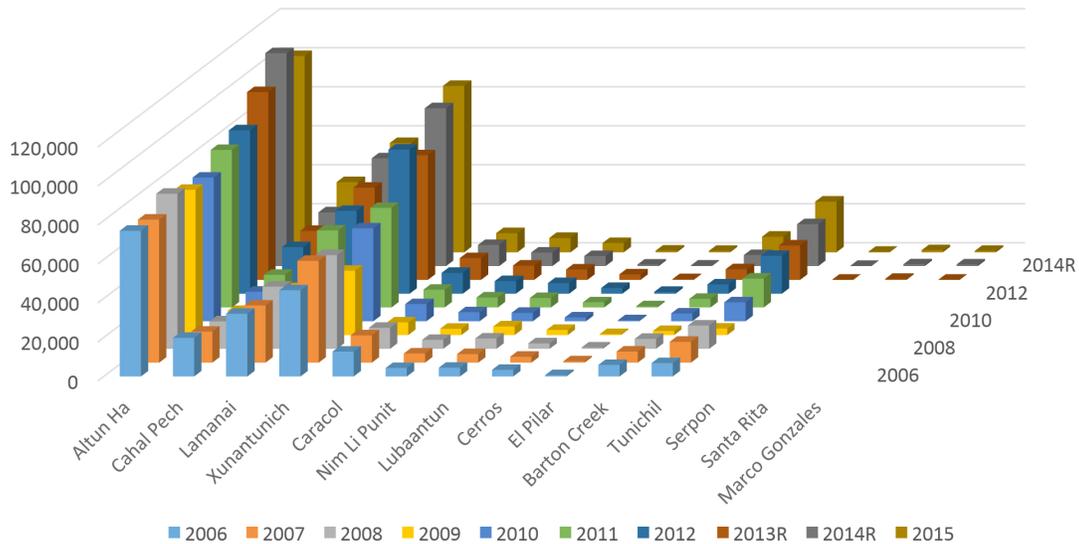
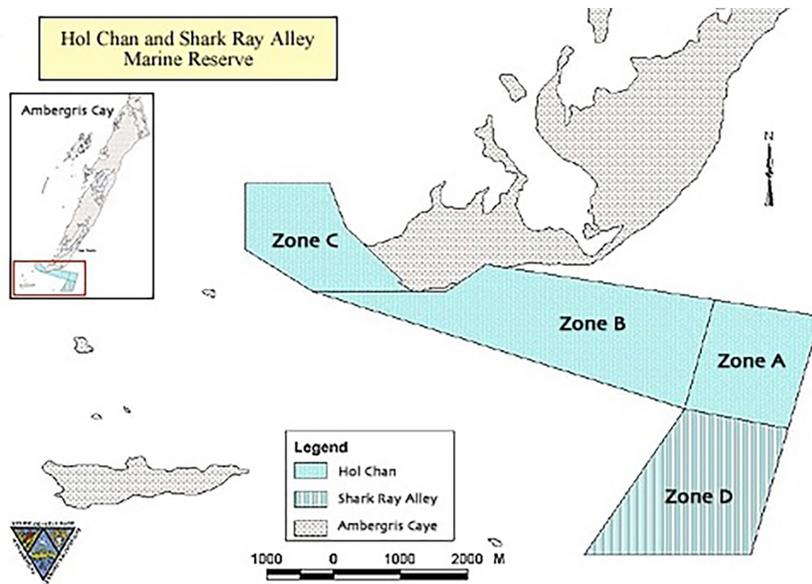


FIGURE 5.6 HOL CHAN & SHARK RAY ALLEY



The Hol Chan Marine Reserve -HCMR (www.holchanbelize.org) is popular with the overnight sector (especially for its proximity to Ambergris Caye and Caye Caulker) as well as the cruise sector.

According to their website, "Over 160 species of fish have been identified in the reserve, along with nearly 40 species of corals, 5 sponges, 8 algae, 2 sea grasses, 3 marine mammals, and 3 species of sea turtle. 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 Sea grass Beds
- Zone C - The Mangroves
- Zone D - Shark Ray Alley

REPORTS ON VISITS TO BELIZE'S PROTECTED AREAS & ARCHAEOLOGICAL SITES

TABLE 5.4 ANNUAL VISITORS TO THE HOL CHAN MARINE RESERVE

Month	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	%Change '15 vs '14
JAN	5,649	4,365	4,916	5,503	5,738	5,350	4,950	6,357	6,880	7333	6.58%
FEB	5,565	4,168	6,940	5,703	7,027	5,435	5,277	6,660	7,135	6724	-5.76%
MAR	7,062	5,930	8,321	6,681	8,362	6,616	8,348	8,593	9,014	9243	2.54%
APR	6,147	5,218	6,140	5,784	7,065	5,743	7,360	6,114	7,684	7669	-0.20%
MAY	4,627	4,406	5,368	4,809	4,972	4,365	5,773	6,131	6,257	5535	-11.54%
JUN	4,748	5,230	6,354	4,687	5,805	3,857	5,569	5,975	5,881	6035	2.62%
JUL	5,290	6,692	7,078	5,755	6,906	5,273	5,913	6,508	7,597	7400	-2.59%
AUG	4,150	5,691	6,958	5,526	5,725	4,725	4,861	6,153	6,865	6880	0.22%
SEP	1,770	1,904	2,263	2,348	2,021	1,978	2,863	2,268	2,697	3487	29.29%
OCT	1,595	2,848	2,215	2,506	2,128	1,992	2,533	2,650	2,685	3690	37.43%
NOV	3,908	4,405	4,256	3,639	4,176	3,950	4,507	4,234	4,511	6064	34.43%
DEC	4,114	5,814	6,099	5,218	4,674	5,637	7,638	7,066	7,181	9069	26.29%
TOTAL	54,625	56,671	66,908	58,159	64,599	54,921	65,592	68,709	74,387	79129	6.37%
%change	-15.50%	-25.80%	3.70%	18.10%	-13.10%	11.10%	-15.00%	19.40%	8.30%	6.37%	

In 2015 there were over 79,000 visitors to the Hol Chan Marine Reserve, which represented an increase of 6.3% over the annual figure in 2014. The month of March was the busiest month for visitor traffic, with over 9,200 visitors in that particular month. The March 2015 arrival figure represented a 2.5% increase over the figure in March 2014. The weakest month for arrivals to the Hol Chan was the month September; in which close to 3,500 visitors made a trip to the site. There were numerous decreases in the monthly visitor numbers to the Reserve through the first half of the year. However, there was positive growth in visitation to the site over the final five months.

REPORTS ON VISITS TO BELIZE'S PROTECTED AREAS & ARCHAEOLOGICAL SITES

FIGURE 5.7 MONTHLY VISITORS TO THE HOL CHAN MARINE RESERVE

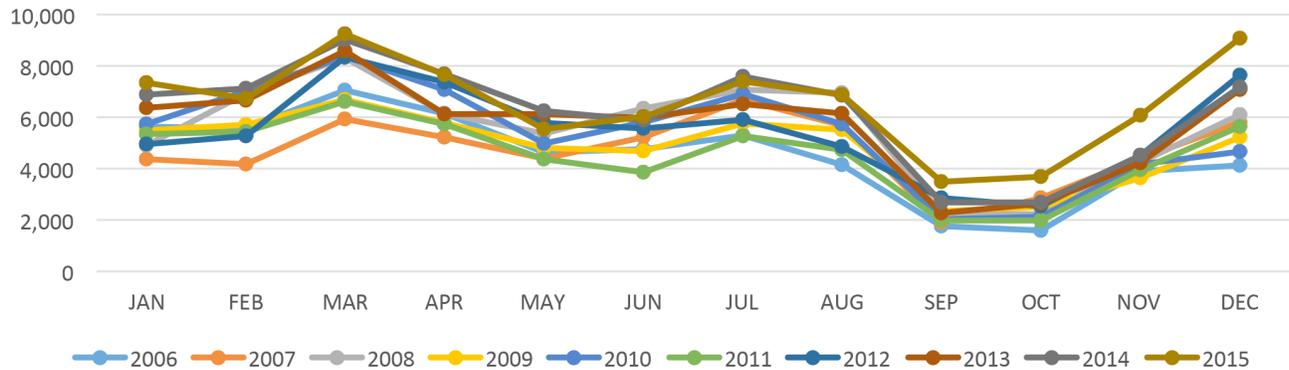


TABLE 5.5 DIVERS AND SNORKELERS TO THE HOL CHAN MARINE RESERVE

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	% Change '15 vs '14
Divers	10434	11195	8991	7660	8694	6599	5578	6452	6917	5847	-15.5%
Snorkelers	39774	41329	54303	46873	52247	45109	55471	56811	61121	66863	9.4%
Total	50208	52524	63294	54533	60941	51708	61049	63263	68038	72710	6.9%

Most visitors to the Hol Chan Marine Reserve were snorkelers. The number of snorkelers to the Reserve increased by 9.4% in 2015, while the number of divers decreased by over 15%. The overall number of visitors who engaged in either of these aquatic activities increased by 6.9% in 2015.

REPORTS ON VISITS TO BELIZE'S PROTECTED AREAS & ARCHAEOLOGICAL SITES

FIGURE 5.8 DIVERS AND SNORKELERS TO THE HOL CHAN MARINE RESERVE

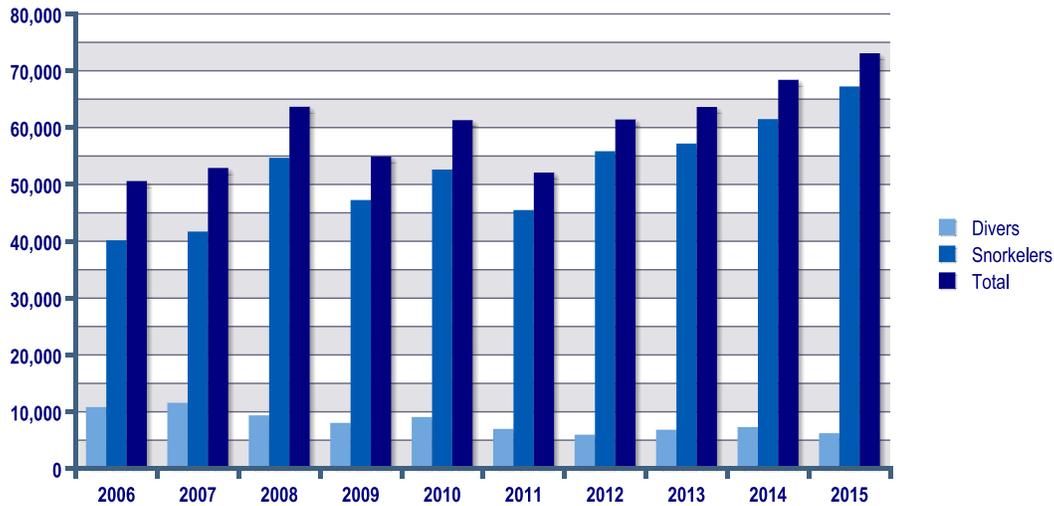


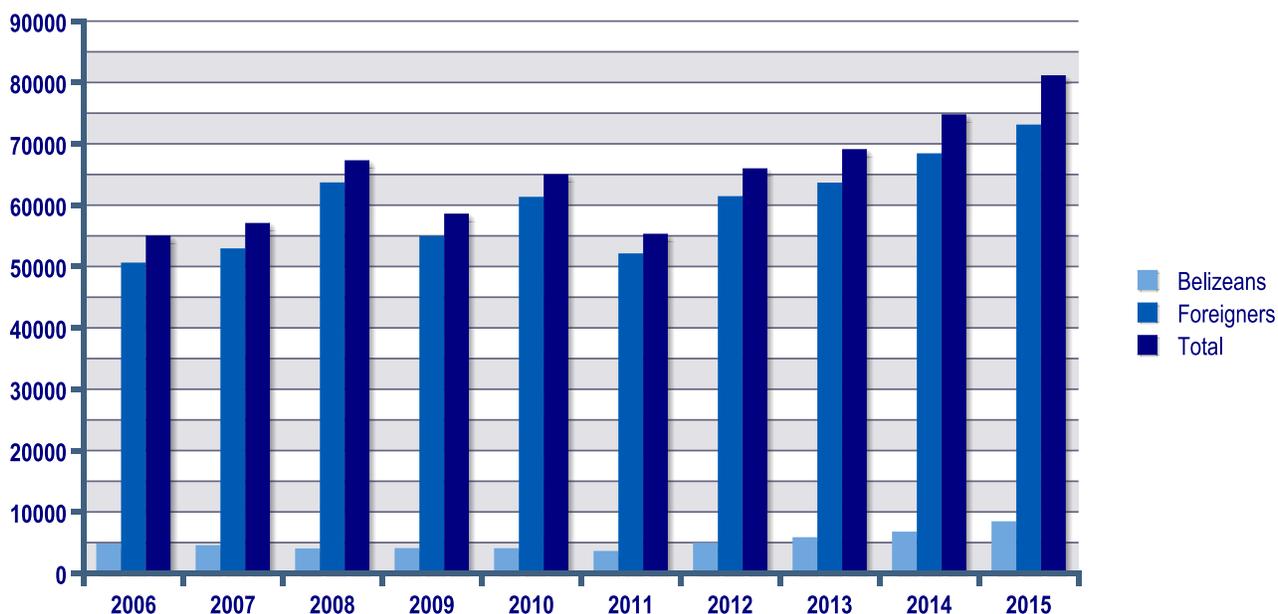
TABLE 5.6 FOREIGNERS AND BELIZEANS TO THE HOL CHAN MARINE RESERVE

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	%Change '15 vs. '14
Belizeans	4,417	4,147	3,614	3,673	3,658	3,213	4,543	5,446	6,349	8,042	26.70%
Foreigners	50,208	52,524	63,294	54,533	60,941	51,708	61,049	63,263	68,038	72,710	6.90%
Total	54,625	56,671	66,908	58,206	64,599	54,921	65,592	68,709	74,387	80,752	8.60%

Foreigners accounted for 90% of visitors to the Hol Chan Marine Reserve in 2015. There was a 6.9% increase in foreigners who visited the Hol Chan Marine Reserve in 2015, and an 8.6% increase in overall visits.

REPORTS ON VISITS TO BELIZE'S PROTECTED AREAS & ARCHAEOLOGICAL SITES

FIGURE 5.9 FOREIGNERS AND BELIZEANS TO THE HOL CHAN MARINE RESERVE



The Belize Audubon Society (BAS) (www.belizeaudubon.org) manages the following protected areas:

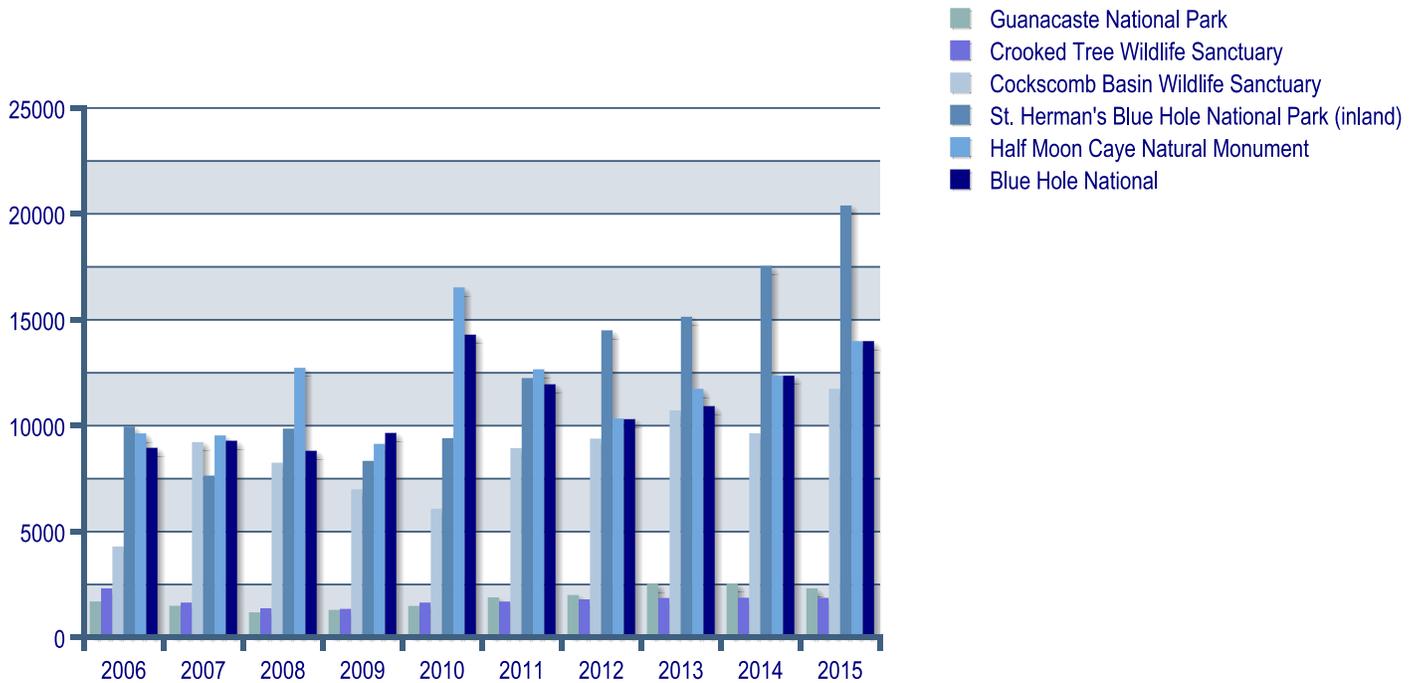
- Blue Hole National Monument
- Cockscomb Basin Wildlife Sanctuary *
- Crooked Tree Wildlife Sanctuary *
- Guanacaste National Park *
- Half Moon Caye Natural Monument
- St. Herman's Blue Hole National Park *
- Tapir Mountain Nature Reserve
- Victoria Peak National Monument

TABLE 5.7 ANNUAL VISITORS TO THE BAS PROTECTED AREA SITES

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	%Change '15 vs '14
Guanacaste National Park	1,564	1,359	1,047	1,166	1,353	1,761	1,869	2,406	2,412	2,179	-9.7
Crooked Tree Wildlife Sanctuary	2,180	1,510	1,245	1,212	1,511	1,557	1,665	1,726	1,743	1,734	-0.5
Cockscomb Basin Wildlife Sanctuary	4,163	9,090	8,115	6,862	5,940	8,810	9,251	10,591	9,504	11,609	22.1
St Hermans Blue Hole National Park (Inland)	9,824	7,507	9,729	8,207	9,278	12,114	14,372	15,010	17,411	20,263	16.4
Half Moon Caye Natural Monument	9,502	9,405	12,600	9,007	16,395	12,530	10,205	11,604	12,222	13,861	13.4
Blue Hole National Monument	8,818	9,156	8,679	9,524	14,167	11,820	10,172	10,787	12,222	13,861	13.4
Total	36,051	38,027	41,415	35,978	48,644	48,592	47,534	52,124	55,514	63,507	14.4

REPORTS ON VISITS TO BELIZE'S PROTECTED AREAS & ARCHAEOLOGICAL SITES

FIGURE 5.10 ANNUAL VISITORS TO THE BAS PROTECTED AREA SITES



St. Herman's Blue Hole National Park had the most site visits of the BAS protected areas, with over 20,200 guests in 2014. The Crooked Tree Wildlife Sanctuary had the fewest visitors in 2015, with a little over 1,700 visitors.

FIGURE 5.11 CAVES BRANCH KAYAKING



Caves Branch is an attraction that caters primarily to cruise visitors, however it is also becoming a site that is frequented by overnight and local visitors as well. At this location, visitors can experience the thrill of an inner tube ride down the river through a series of caves. In 2015, there were 156,498 visitors to Caves Branch, which is a 12.4% decrease compared to the figure of 2014.

REPORTS ON VISITS TO BELIZE'S PROTECTED AREAS & ARCHAEOLOGICAL SITES

TABLE 5.8 ARRIVAL TO CAVES BRANCH BY VISITOR TYPE 2014

2014	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Non-residents	5179	6225	10356	8612	4308	6637	7601	6247	2336	2311	4210	9563	73585
Residents	259	2	0	13	0	7	19	8	0	0	6	5	319
Government	2	6	8	9	2	15	0	10	9	12	3	5	81
School trips	0	50	109	0	0	0	0	0	0	0	9	5	173
Sunday Belizeans	6	68	841	1173	229	345	415	334	175	136	44	16	3782
Cruise Ship visitor	10012	9796	14138	12355	6213	7987	9847	6236	3712	3494	4900	12018	100708
Monthly Total:	15458	16147	25452	22162	10752	14991	17882	12835	6232	5953	9172	21612	178648

TABLE 5.9 ARRIVALS TO CAVE BRANCH BY VISITOR TYPE 2015

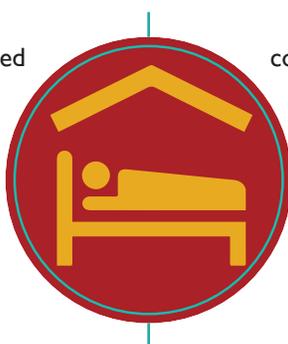
2015	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Non-residents	7289	6013	12793	8018	4235	4911	7833	6508	3171	2742	2148	10229	75890
Residents	4	0	0	0	0	6	0	6	0	53	0	0	69
Government	0	0	0	6	0	0	0	8	3	4	5	11	37
School trips	0	0	0	96	105	0	0	0	0	17	7	0	225
Sunday Belizeans	25	113	0	1527	394	119	0	1094	587	430	70	0	4359
Cruise Ship visitors	9408	7526	12482	8233	3835	3260	8066	6137	4587	112	1615	10657	75918
Monthly Total:	16726	13652	25275	17880	8569	8296	15899	13753	8348	3358	3845	20897	156498

SECTION VI

Reports on Belize's Accommodation Sectors



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 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”. However, for the purpose of this report, all accommodation establishments are referred to as ‘hotels’ and each must comply with the legislated minimum standards.

TABLE 6.1 NUMBER OF HOTELS BY AREA

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Belize District	54	59	61	56	54	54	55	58	57	58
Ambergris Caye	98	99	108	125	141	154	153	163	166	172
Caye Caulker	70	73	71	75	79	86	87	90	105	108
Cayo	89	97	95	101	101	110	114	118	122	125
Corozal	31	29	34	34	36	37	33	34	33	33
Orange Walk	18	20	19	19	19	22	21	20	23	23
Stann Creek	55	56	60	58	56	60	61	69	81	91
Placencia	81	88	99	109	104	113	119	121	135	156
Toledo	29	35	36	37	38	39	39	39	40	40
Other Islands	36	35	37	37	36	41	41	45	43	44
TOTAL	561	591	620	651	664	716	723	757	805	850
% Change	9.2	0.7	5.3	4.9	5	1.9	7.8	0.9	6.34	5.6

The number of accommodations increased by 45 properties in 2015, which translates to an increase of 5.6% over the total for 2014. The largest regional increase occurred in Placencia, where the number of properties grew by 21 or 15.6% over the figure in 2014.

REPORTS ON BELIZE'S ACCOMMODATION SECTOR

FIGURE 6.1 NUMBER OF HOTELS BY AREA

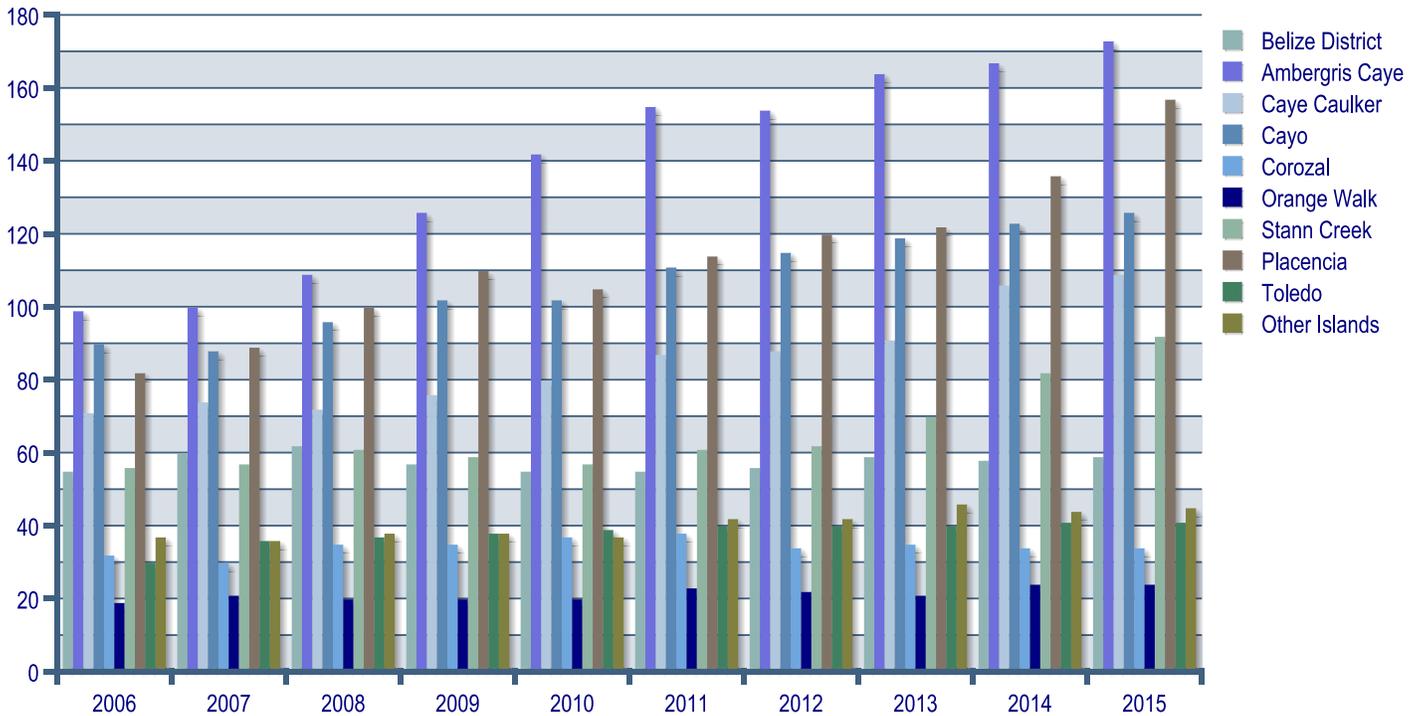


TABLE 6.2 NUMBER OF ROOMS BY AREA

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Belize District	874	966	987	950	929	938	942	1107	931	930
Ambergris Caye	1401	1443	1559	1601	1772	1862	1716	1841	1833	1898
Caye Caulker	555	580	600	650	652	629	610	680	713	726
Cayo	868	942	984	1011	1001	1098	1118	1107	1143	1174
Corozal	280	283	306	310	350	358	327	334	368	371
Orange Walk	225	237	237	239	247	262	260	258	289	291
Stann Creek	450	495	522	542	540	542	544	562	608	649
Placencia	612	689	706	731	707	721	730	764	764	842
Toledo	223	265	274	292	306	315	312	324	323	323
Other Islands	301	300	364	345	318	386	373	400	392	415
TOTAL	5789	6200	6539	6671	6822	7111	6932	7377	7364	7619
% Change	1.8	8.8	3.5	7.1	5.5	2	2.3	4.2	-2.5	3.5

As with the number of properties, the total number of rooms countrywide also increased. The number of rooms increased by 255 over 2014, which translated to an increase of 3.5% over the figure in 2014. The largest increase occurred in the Placencia area, where the number of rooms increased by 78, or 10.2%.

REPORTS ON BELIZE'S ACCOMMODATION SECTOR

FIGURE 6.2 NUMBER OF ROOMS BY AREA

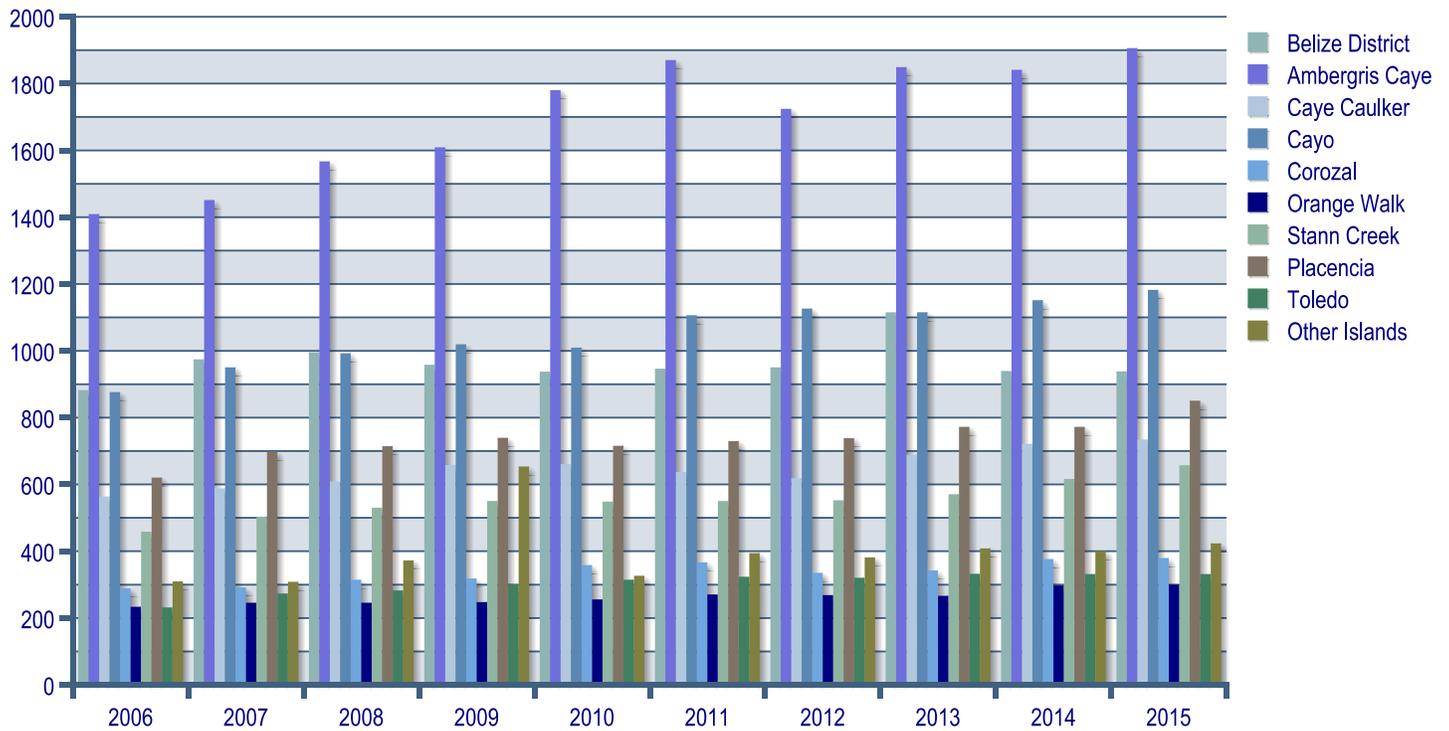


TABLE 6.3 NUMBER OF BEDS BY AREA

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Belize District	1,349	1,469	1,647	1,520	1,514	1,468	1,810	2,082	1,394	1387
Ambergris Caye	2,299	2,410	2,701	2,956	3,217	3,364	3,013	3,318	3,388	3427
Caye Caulker	903	921	750	959	1031	1034	997	1125	1177	1197
Cayo	1,602	1,726	1,766	1,859	1,814	1,908	1,908	1,965	2,049	2097
Corozal	395	394	427	431	493	529	494	502	565	577
Orange Walk	413	432	433	423	448	469	463	441	471	518
Stann Creek	775	952	985	945	887	897	915	966	1082	1130
Placencia	908	1058	1060	1,125	1,070	1,131	1,193	1,215	1,291	1434
Toledo	437	544	576	628	647	628	603	668	624	637
Other Islands	570	596	668	653	573	685	662	733	763	807
TOTAL	9,651	10,502	11,013	11,499	11,694	12,113	12,058	13,015	12,804	13211
% Change	3.5	8.8	4.9	4.4	1.7	3.6	-0.5	-0.5	-1.62	3.2

In 2015, the largest increase in the number of beds occurred in Placencia, which noted an increase of 143 beds, or 11% over 2014. The number of beds increased by 407 countrywide, or 3.2% over the total in 2014.

REPORTS ON BELIZE'S ACCOMMODATION SECTOR

FIGURE 6.3 NUMBER OF BEDS BY AREA

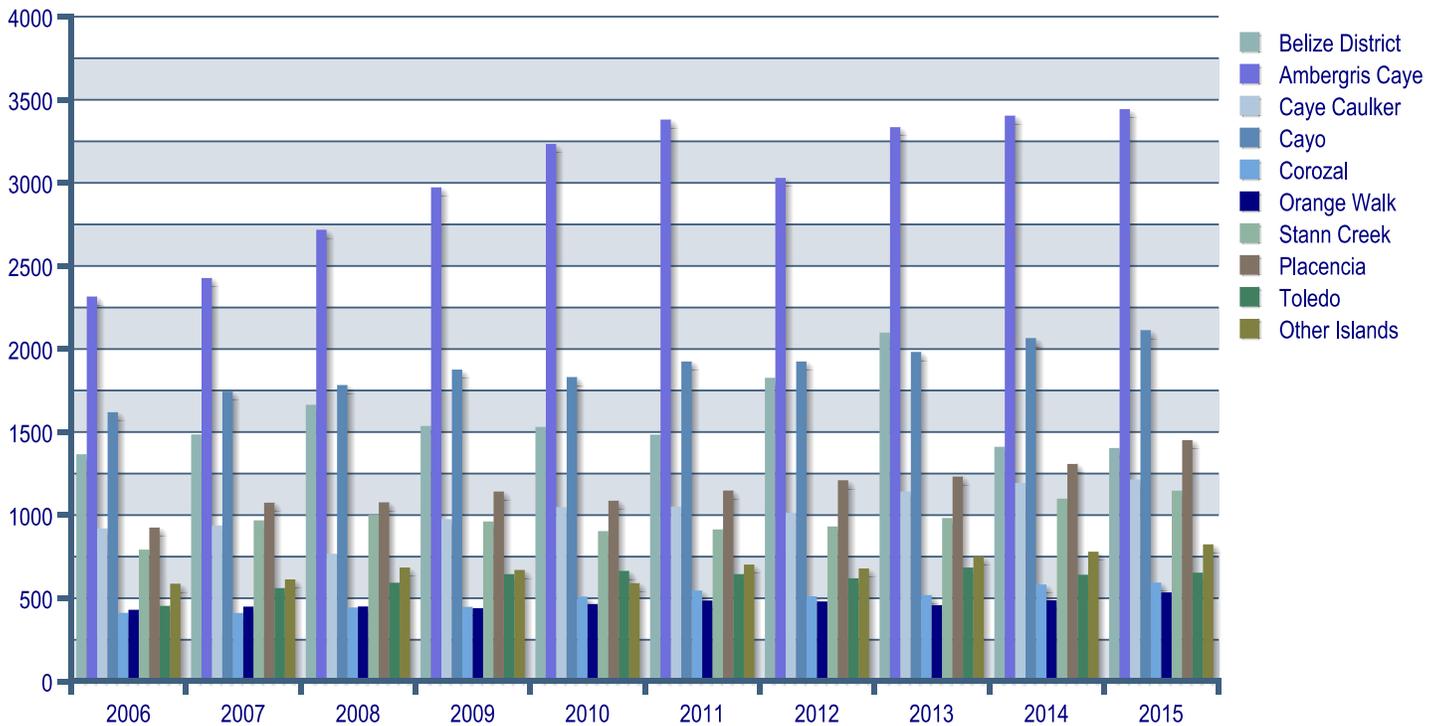


TABLE 6.4 NUMBER OF HOTELS BY ROOM SIZE BY AREA

AREA	1 - 10	11 - 20	21 - 50	> 50	TOTAL
Belize District	36	12	7	3	58
Ambergris Caye	117	27	23	5	172
Caye Caulker	85	20	2	1	108
Cayo	83	30	11	1	125
Corozal	25	4	3	1	33
Orange Walk	12	7	4	0	23
Stann Creek	70	18	3	0	91
Placencia	142	8	4	2	156
Toledo	30	9	1	0	40
Other Islands	26	16	2	0	44
	626	151	60	13	850
	73.60%	17.80%	7.10%	1.50%	

Belize's hotel industry is mainly comprised of small to medium sized properties. Over 73% of the properties in the country contain fewer than 11 rooms. The majority of properties, this size, are located in the Placencia area. Only 1.5% of all properties in Belize have more than 50 rooms. Most of these types of properties are located in Ambergris Caye.

REPORTS ON BELIZE'S ACCOMMODATION SECTOR

TABLE 6.5 HOTEL OCCUPANCY BY AREA 2011

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Regional
Belize District	58.1	34.9	45.9	37.9	34.1	39.7	40.7	29.9	37.9	34.2	30.2	44.2	38.6
Ambergris Caye	43.2	65.5	59.2	46.9	41.8	38	41.2	37.8	24.3	19.3	38.7	55.4	43.7
Caye Caulker	49.7	60.6	57.1	54.8	41.4	45.4	50.5	46	45.8	17	22.8	39.3	44.3
Cayo	45.4	51.1	50.2	42.3	30.3	39.7	35.5	37.8	16.8	19.5	28.9	50.1	38.2
Corozal	34.6	48.8	30.5	39	25.3	28.3	35	15.2	12	22.1	28.5	28	28.5
Orange Walk	50.2	64.6	56.5	28.9	52	43.2	35.8	28	3.7	16.3	30	45.1	39.9
Stann Creek	40	37.8	45.2	27	38.9	36	39.3	30.6	21.2	12.8	45.8	40.4	36.1
Placencia	53.3	59.7	47.5	41.2	42.3	39.6	27.2	25.4	11.7	20.4	34.1	39.3	38.5
Toledo	37.5	39.3	47.8	40.4	31.1	18.9	21.7	26	20.4	14.1	30.9	27.8	30.9
Other Islands	27.8	27.3	30.4	27.1	38.5	39.4	43.2	13.2	4.1	16.7	28.7	25.1	27.9
Monthly	45.7	55.5	50.6	41.9	37.9	38.7	38.3	31.9	24.9	22.3	33.3	45.6	39.3

TABLE 6.6 HOTEL OCCUPANCY BY AREA 2012

AREA	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Regional
Belize District	38	53.6	52	35	46.9	38.4	53.2	47.6	40.8	24.8	49.9	48.6	43.2
Ambergris Caye	50.6	66.9	62.6	56.8	50.1	50.8	47.2	41.6	25.8	30.2	48.1	50.1	47.7
Caye Caulker	51.5	71.4	43.3	58.8	39.3	39.7	48.6	36.9	19.3	18.3	35.9	57.2	43.2
Cayo	42.9	35.1	56.3	52	35.7	35	37.7	46.3	20.1	22.6	44.2	53.2	40.2
Corozal	18.1	24.5	32.3	43.1	11.9	15.8	37.4	20.2	32.2	32.6	33.3	50.9	30.4
Orange Walk	48.2	47.7	55.6	42.9	40.4	43.7	19.1	26.3	26.4	29.6	37.5	45.6	38.7
Stann Creek	36.5	23.8	47.7	53.3	40.4	53.1	52.4	63.2	28.8	45.6	50.8	61.1	48.1
Placencia	34.1	62	49.6	41.5	35.6	29.9	31.3	24.5	16.5	20	32.9	31.8	33
Toledo	36.6	37.3	55.3	55.8	23.9	18	14.9	17.5	13.7	19.5	26.2	28.9	27.2
Other Islands	36.7	30.5	38.9	44.6	39.1	34.2	34.6	31	11.4	23.9	25.6	52.9	34.8
Monthly	42	54.4	53.7	49.7	42.1	40	43.2	39.8	25.8	26.1	43.1	48.9	42.1

REPORTS ON BELIZE'S ACCOMMODATION SECTOR

TABLE 6.7 HOTELS OCCUPANCY BY AREA 2013

2013 AREA	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Regional
Belize District	47.8	58.4	69.9	63.8	59.5	58.5	63.3	44.5	39.8	45.4	56.6	54.5	54.8
Ambergris Caye	60.2	63.9	67.7	58	51	52.6	51.5	46.9	26.4	30.9	47.9	54.3	51.1
Caye Caulker	61.7	66.5	58.2	54.8	47	44.5	43.7	45.7	18.6	20	40.6	52.6	46
Cayo	45.1	52.7	48.5	43.1	41.2	38.6	46	35.6	16.4	23.2	40.2	47.9	40
Corozal	34.8	47.3	33.1	36.8	24.3	21.5	35.2	29.7	11.3	31.5	24.5	33.6	28.9
Orange Walk	58	59.8	63.5	39.9	42.4	66.3	43.9	32.2	22.4	27.2	30.6	56.7	44.6
Stann Creek	67.8	55.1	71	70	57.5	66.1	63.6	62	26.2	38.1	61.3	54.9	58
Placencia	47.7	34.6	55.3	64.3	47.2	33.1	38.8	30.3	23	33	36.6	37.2	39.6
Toledo	33.3	41.8	49.1	53.9	26.3	40.9	25.3	14.4	10.7	13.6	24	33	30.8
Other Islands	45.3	46	34.1	48.2	45.8	29.3	39.4	24.9	10.5	22.1	30.5	34.8	34.2
Monthly	52.8	56.9	59.1	55.2	48.4	47.4	49.3	40.7	23.9	30.9	44.3	49.4	46.5

TABLE 6.8 HOTEL OCCUPANCY BY AREA 2014

2014 AREA	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Regional
Belize District	59.6	66.4	73.7	70.6	61.7	63.3	57.1	48.5	36	37.3	47.5	59.8	56.7
Ambergris Caye	56.3	65.2	60.8	52.6	46.8	50.6	49.4	40.9	23.4	29.7	46.4	52.7	48
Caye Caulker	55.3	69.1	75.1	72	47.8	43.8	55.3	43.5	18.7	25.4	48.9	49.6	51.1
Cayo	50.4	55.3	65.3	48.6	40.6	50.4	45.5	37.6	20.3	30.1	38.8	44.1	43.8
Corozal	32.8	42.1	27.9	33.7	26.5	26.2	38.9	29.9	27.4	46.5	23.6	25.7	31.4
Orange Walk	47.8	59.9	38.8	43.5	42.2	53.9	39	17.8	25.2	20.7	27.6	30.7	38.1
Stann Creek	71.3	85.2	46.9	65	62.9	61.7	64.8	59.1	17.9	22.4	36.2	51.7	53.7
Placencia	43.1	49.5	53.6	47.3	34.4	34.7	34.6	32	18.8	20.3	31.3	37	36.9
Toledo	29.2	43.1	35.3	41.1	37.1	38.2	18.2	27.8	17.2	14.3	29	32.6	30
Other Islands	47.2	39.5	37.6	52.9	25.5	32	23.6	19.2	13.3	20.7	24.7	34.7	32.5
Monthly	52.7	60.4	58.5	54.2	45.2	49.7	46.9	39.7	24	29	40.4	47.7	45.9

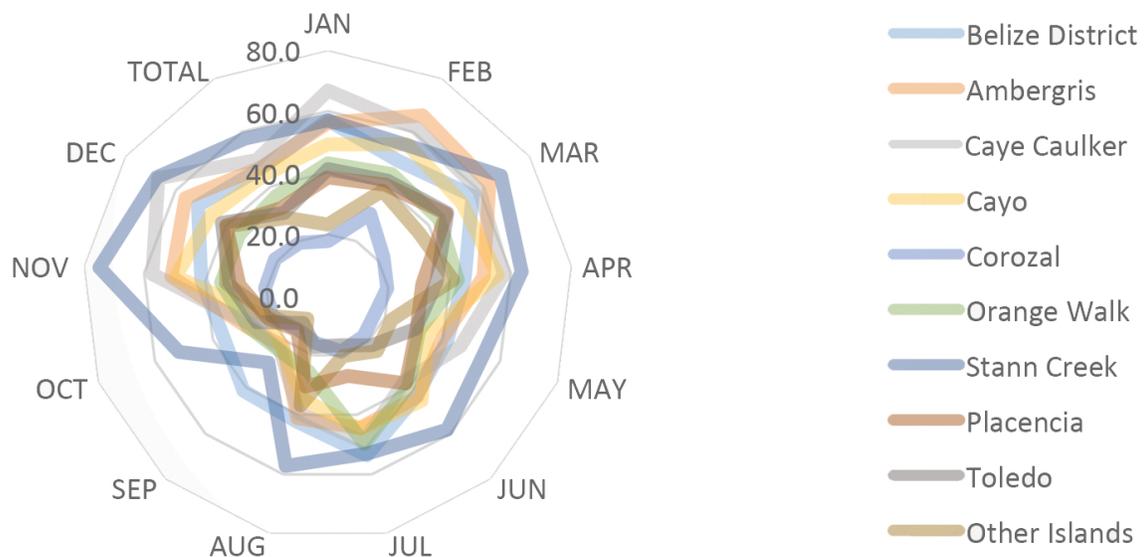
TABLE 6.9 HOTELS OCCUPANCY BY AREA 2015

AREA	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Regional
Belize District	57.1	49.5	57.2	44.7	41.5	43.7	53.5	42.1	41.3	36.5	41.5	51.3	46.7
Ambergris Caye	56.3	66.3	64	51.1	39.7	44	44.4	41.3	21.9	28.4	51.2	56	47
Caye Caulker	66.7	61.5	60	57.7	46.2	37.5	49.1	45.1	23.3	26.8	57.5	67.1	50.3
Cayo	49.1	55.6	53.2	55.8	34.9	45.9	44.7	34.6	22.4	20.3	49.9	46.2	44.3
Corozal	17.7	30	22.2	19.5	16.4	17.6	18.8	16	14.7	19.3	20.4	20.9	19.4
Orange Walk	42.9	44.5	44.1	42.6	31.8	39.5	49.8	25.7	23.7	28	34.8	34.9	36.5
Stann Creek	57.1	55.3	68.5	63.6	54.1	58.5	53.1	57.1	29.1	51.8	74.8	67.5	57.7
Placencia	38.4	40.6	46.8	30.9	30.9	38.2	27.1	30.5	15	20.8	28.9	40.1	32.2
Toledo	41.2	42.1	47.2	35.5	30.5	21.6	16.8	17.2	12	24.6	32.2	41.7	30.4
Other Islands	23	38.5	36	41	22.2	24.1	20.3	36.8	10.2	19.1	33.2	39.6	28.5
Monthly	50	54.3	55.4	46.7	37.3	41.6	42.1	37.7	23.3	28.5	45	49.5	42.8

The hotel occupancy decreased from 45.9% in 2014 to 42.8% in 2015. This may appear to be a peculiar occurrence since the number of overnight visitors to the country increased by over 6% in 2015. It is important to realize however, that the number of rooms actually decreased by 2.5% in 2014 and then increased by 3.5% in 2015. The 255 rooms added to the pool of available rooms in 2015 was a major contributing factor in the decrease of the annual occupancy, since there were many more rooms to be filled in 2015 than there were in 2014.

Stann Creek and Caye Caulker were the top two performing regions in terms of hotel occupancy in 2015. They were the only regions to report an annual occupancy greater than 50% in 2015. The Belize district was the top performer in hotel occupancy in 2014, but fell ten percentage points to 46.7% in 2015.

FIGURE 6.4 HOTEL OCCUPANCY BY AREA / REGION 2015

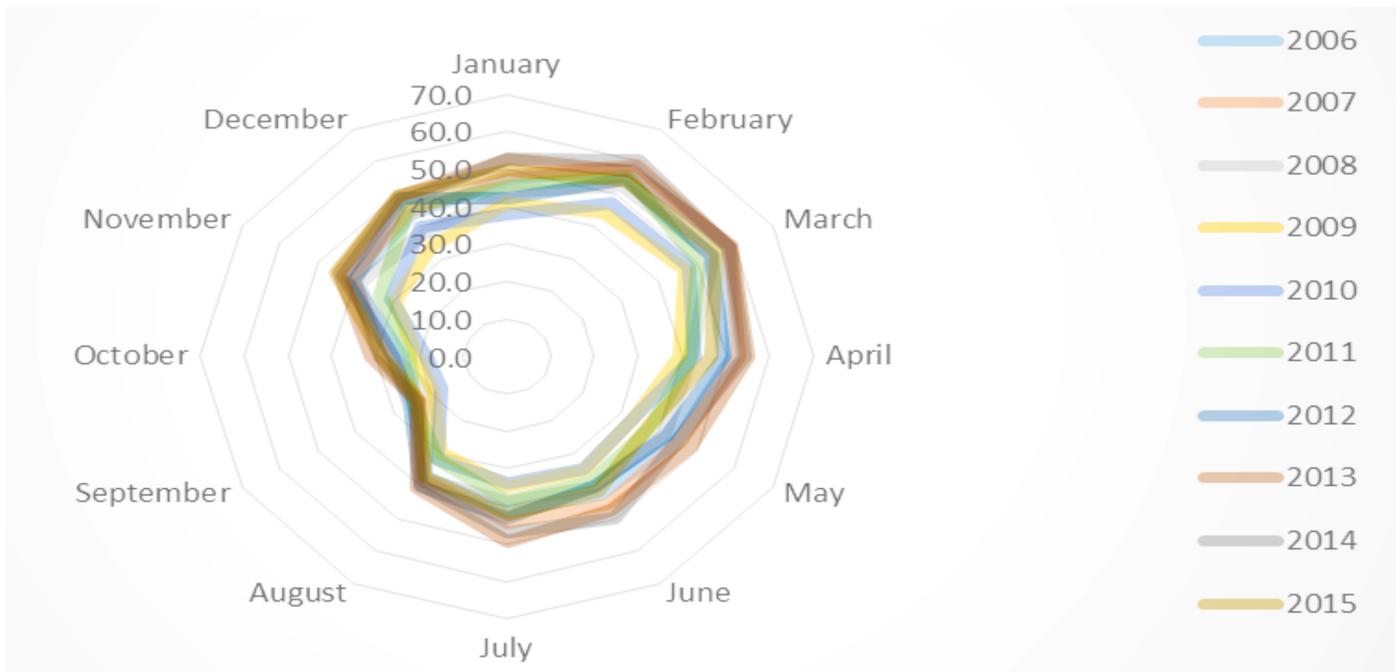


REPORTS ON BELIZE'S ACCOMMODATION SECTOR

TABLE 6.10 HOTEL OCCUPANCY BY MONTH: 2006 - 2015

Month	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
January	47.1	48.1	44	40.9	38	45.7	42	52.8	52.7	50
February	57.8	59.2	52.8	44.5	47.2	55.5	54.4	56.9	60.4	54.3
March	58	58.6	54.1	46.8	48.1	50.6	53.7	59.1	58.5	55.4
April	51.5	53	41.8	39.4	42.9	41.9	49.7	55.2	54.2	46.7
May	45.2	45.4	41.6	33.1	33.2	37.9	42.1	48.4	45.2	37.3
June	42.6	45.6	40.2	35.3	34.8	38.7	40	47.4	49.7	41.6
July	41.4	44.3	39	34.6	33.9	38.3	43.2	49.3	46.9	42.1
August	37.1	38.2	37.5	30	31.6	31.9	39.8	40.7	39.7	37.7
September	24.8	23.3	20.4	19.3	17.3	24.9	25.8	23.9	24	23.3
October	24	27.2	26.1	20.6	18.4	22.3	26.1	30.9	29	28.5
November	40.8	41.9	39.1	29.8	30.7	33.3	43.1	44.3	40.4	45
December	43.7	44.7	37.9	34.3	39.8	45.6	48.9	49.4	47.7	49.5
Annual	42.9	44.3	39.9	34.1	34.9	39.3	42.1	46.5	45.9	42.8

FIGURE 6.5 HOTEL OCCUPANCY BY MONTH: 2006 – 2015



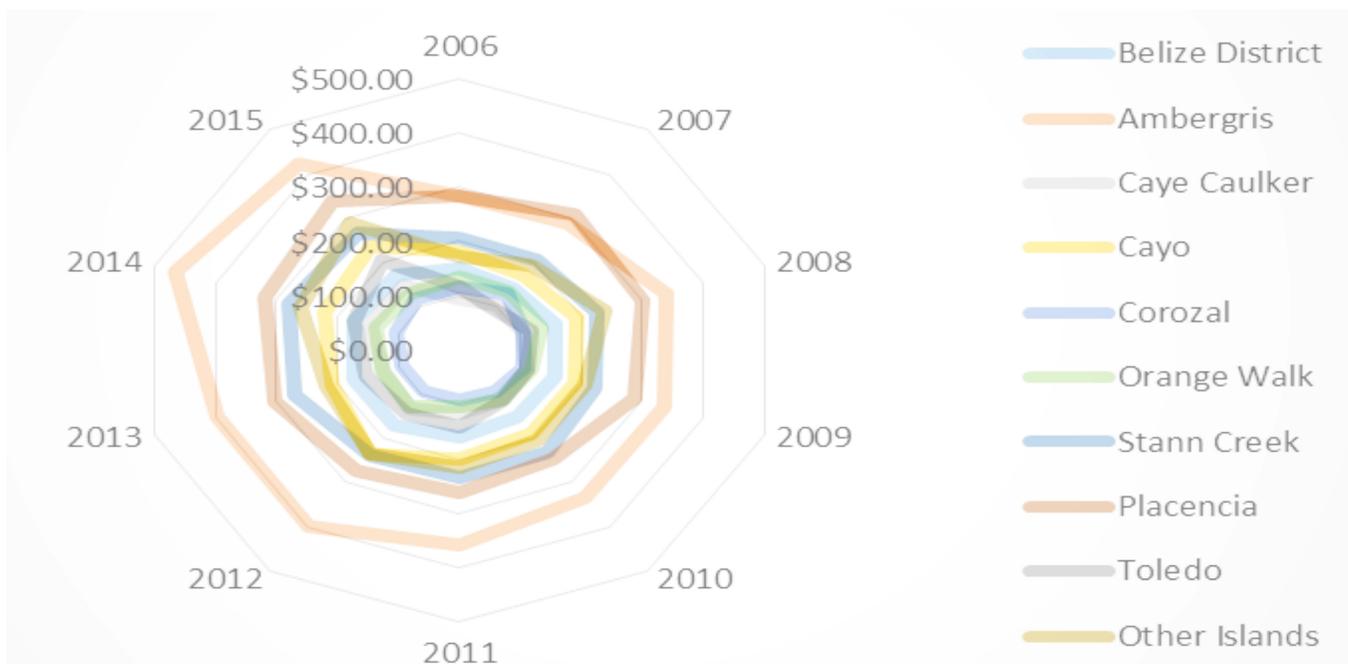
REPORTS ON BELIZE'S ACCOMMODATION SECTOR

TABLE 6.1 | AVERAGE DAILY ROOM RATE BY AREA (\$BZ)

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Belize District	\$148.97	\$140.84	\$156.42	\$158.58	\$151.55	\$159.85	\$171.51	\$173.08	\$173.67	\$169.12
Ambergris Caye	\$283.42	\$287.60	\$338.47	\$335.15	\$335.00	\$358.34	\$401.32	\$397.72	\$464.94	\$424.59
Caye Caulker	\$95.13	\$101.94	\$105.51	\$110.95	\$112.06	\$115.19	\$132.71	\$122.79	\$145.04	\$149.61
Cayo	\$181.26	\$170.97	\$193.31	\$190.15	\$189.73	\$198.25	\$234.77	\$207.34	\$221.75	\$235.08
Corozal	\$115.04	\$128.28	\$104.87	\$103.80	\$94.44	\$92.50	\$91.83	\$94.72	\$105.22	\$117.02
Orange Walk	\$135.43	\$131.56	\$132.77	\$118.14	\$112.87	\$104.18	\$128.94	\$125.41	\$136.31	\$130.23
Stann Creek	\$205.36	\$206.08	\$225.71	\$222.08	\$230.86	\$234.15	\$238.86	\$268.60	\$279.36	\$266.82
Placencia	\$283.11	\$308.63	\$301.05	\$285.76	\$246.25	\$262.47	\$274.31	\$300.78	\$317.93	\$336.62
Toledo	\$115.82	\$93.02	\$118.10	\$111.82	\$114.40	\$140.17	\$142.42	\$153.66	\$171.66	\$205.55
Other Islands	\$173.12	\$192.33	\$239.66	\$206.67	\$205.86	\$213.74	\$236.24	\$216.98	\$258.90	\$291.07
TOTAL	\$204.12	\$206.61	\$226.88	\$221.63	\$217.42	\$225.93	\$257.51	\$253.43	\$285.41	\$278.47

The overall average daily room rate decreased by almost \$7 BZD from \$285.41 BZD in 2014, to \$278.47 BZD in 2015. Ambergris Caye had the highest average room rate in 2015, at over \$424.00 BZD per night. Ambergris has had the highest average room rate in the country for the past eight years. In 2015, Corozal had the lowest average room rate in the country, at a little over \$117.00 BZD. Corozal has had the lowest average room rate in the country for the past eight years.

FIGURE 6.6 AVERAGE DAILY ROOM RATE BY AREA (\$BZ)

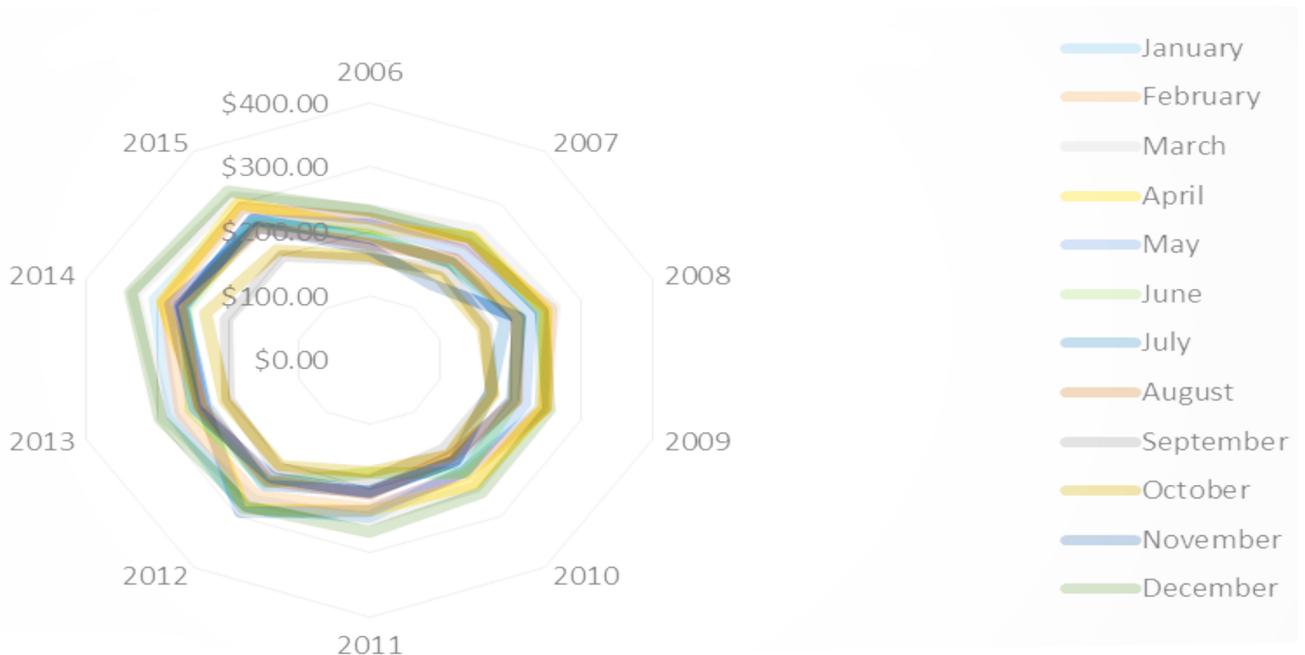


REPORTS ON BELIZE'S ACCOMMODATION SECTOR

TABLE 6.12 AVERAGE DAILY ROOM RATE BY MONTH (\$BZ)

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
January	\$220.65	\$227.55	\$244.54	\$243.87	\$215.57	\$244.61	\$285.86	\$278.18	\$303.46	\$291.86
February	\$220.52	\$223.63	\$254.85	\$247.44	\$220.18	\$230.60	\$261.10	\$266.32	\$288.51	\$291.97
March	\$234.45	\$248.06	\$261.95	\$240.83	\$243.38	\$249.37	\$269.23	\$288.41	\$331.99	\$311.80
April	\$203.58	\$235.66	\$249.10	\$245.84	\$238.74	\$234.99	\$286.77	\$236.34	\$294.81	\$299.28
May	\$209.15	\$209.77	\$226.01	\$219.80	\$216.24	\$235.37	\$294.39	\$233.56	\$267.33	\$268.53
June	\$194.75	\$185.16	\$212.44	\$204.03	\$216.76	\$177.47	\$235.05	\$252.79	\$259.50	\$263.48
July	\$190.28	\$187.61	\$191.90	\$170.16	\$194.01	\$204.73	\$240.61	\$232.54	\$263.31	\$268.27
August	\$179.22	\$193.42	\$208.23	\$206.17	\$186.26	\$209.67	\$232.64	\$240.70	\$269.78	\$252.94
September	\$156.06	\$172.29	\$165.35	\$170.84	\$171.11	\$189.26	\$210.30	\$201.21	\$202.66	\$199.52
October	\$161.17	\$158.36	\$159.46	\$174.50	\$183.50	\$173.92	\$204.38	\$204.53	\$232.17	\$211.41
November	\$173.90	\$144.00	\$210.98	\$200.78	\$195.84	\$206.85	\$225.37	\$245.89	\$280.38	\$254.37
December	\$232.38	\$232.44	\$242.37	\$252.84	\$256.06	\$267.65	\$281.53	\$295.60	\$339.22	\$324.01
Overall	\$204.12	\$206.61	\$226.88	\$221.63	\$217.43	\$225.93	\$257.51	\$253.43	\$285.41	\$278.47

FIGURE 6.7 AVERAGE DAILY ROOM RATE BY MONTH (\$BZ)



REPORTS ON BELIZE'S ACCOMMODATION SECTOR

TABLE 6.13 REVENUE PER AVAILABLE ROOM -REVPAR (\$BZ) BY AREA 2014

AREA	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Regional
Belize District	\$121.50	\$137.19	\$157.67	\$120.42	\$127.55	\$129.65	\$120.65	\$96.99	\$72.75	\$76.46	\$100.06	\$119.40	\$114.92
Ambergris	\$320.42	\$340.32	\$347.72	\$282.78	\$218.56	\$222.02	\$226.26	\$191.47	\$87.71	\$116.40	\$211.24	\$286.79	\$238.68
Caye Caulker	\$118.96	\$134.09	\$175.28	\$151.75	\$100.05	\$105.53	\$122.47	\$117.77	\$52.33	\$43.77	\$104.00	\$120.54	\$114.14
Cayo	\$154.52	\$173.99	\$224.67	\$164.54	\$104.01	\$119.37	\$108.11	\$95.83	\$39.61	\$68.84	\$103.11	\$159.80	\$125.62
Corozal	\$41.26	\$49.05	\$36.17	\$46.47	\$31.45	\$42.71	\$47.85	\$37.28	\$32.19	\$50.12	\$29.71	\$31.80	\$39.15
Orange Walk	\$84.77	\$128.09	\$116.57	\$62.36	\$54.28	\$56.06	\$39.93	\$39.97	\$25.65	\$24.41	\$35.69	\$82.37	\$63.82
Stann Creek	\$330.17	\$338.56	\$289.78	\$307.12	\$182.29	\$244.29	\$227.17	\$226.41	\$54.62	\$69.52	\$218.18	\$342.40	\$239.24
Placencia	\$203.44	\$225.21	\$242.65	\$212.82	\$134.94	\$114.74	\$120.86	\$115.31	\$58.02	\$80.80	\$132.42	\$216.36	\$158.36
Toledo	\$69.92	\$125.45	\$112.59	\$109.15	\$87.32	\$71.93	\$47.40	\$63.35	\$29.90	\$25.70	\$62.67	\$136.21	\$77.88
Other Islands	\$112.46	\$99.64	\$121.46	\$118.25	\$88.32	\$75.47	\$82.78	\$45.01	\$32.24	\$77.96	\$76.90	\$117.99	\$91.68
Monthly	\$209.99	\$227.18	\$245.60	\$202.63	\$153.20	\$158.38	\$152.96	\$134.85	\$65.18	\$86.48	\$143.57	\$204.12	\$166.64

TABLE 6.14 REVENUE PER AVAILABLE ROOM -REVPAR (\$BZ) BY AREA 2015

AREA	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Regional
Belize District	\$135.23	\$116.61	\$122.97	\$98.02	\$84.51	\$91.28	\$117.77	\$84.96	\$81.67	\$75.81	\$80.07	\$112.81	\$100.28
Ambergris	\$285.66	\$303.59	\$315.06	\$248.80	\$168.13	\$181.41	\$206.87	\$163.46	\$77.84	\$102.31	\$201.61	\$302.40	\$212.74
Caye Caulker	\$154.53	\$148.41	\$138.08	\$137.25	\$94.95	\$88.63	\$104.13	\$83.19	\$43.53	\$49.11	\$123.60	\$152.77	\$111.17
Cayo	\$151.71	\$181.10	\$200.73	\$182.73	\$103.19	\$113.87	\$115.52	\$102.27	\$47.64	\$46.57	\$125.72	\$189.99	\$135.71
Corozal	\$21.46	\$39.54	\$31.78	\$26.05	\$19.27	\$30.30	\$32.31	\$18.24	\$19.10	\$27.39	\$27.66	\$28.99	\$26.34
Orange Walk	\$83.66	\$93.94	\$105.54	\$64.97	\$36.99	\$57.81	\$55.91	\$32.36	\$24.60	\$31.38	\$43.99	\$66.74	\$58.27
Stann Creek	\$286.98	\$288.36	\$309.00	\$300.07	\$230.98	\$246.58	\$156.78	\$197.95	\$78.33	\$153.69	\$243.88	\$362.93	\$238.86
Placencia	\$209.96	\$256.55	\$267.57	\$184.30	\$130.23	\$140.12	\$98.86	\$107.89	\$48.59	\$46.60	\$119.85	\$285.00	\$155.71
Toledo	\$142.32	\$168.96	\$151.21	\$114.49	\$95.26	\$58.46	\$47.25	\$45.90	\$19.22	\$35.65	\$104.17	\$186.75	\$99.05
Other Islands	\$97.03	\$106.57	\$135.08	\$127.33	\$65.19	\$72.56	\$71.80	\$122.77	\$55.78	\$64.98	\$122.57	\$159.14	\$99.81
Monthly	\$201.75	\$211.93	\$223.65	\$180.67	\$124.70	\$133.78	\$141.53	\$119.83	\$62.19	\$78.74	\$142.99	\$212.66	\$153.82

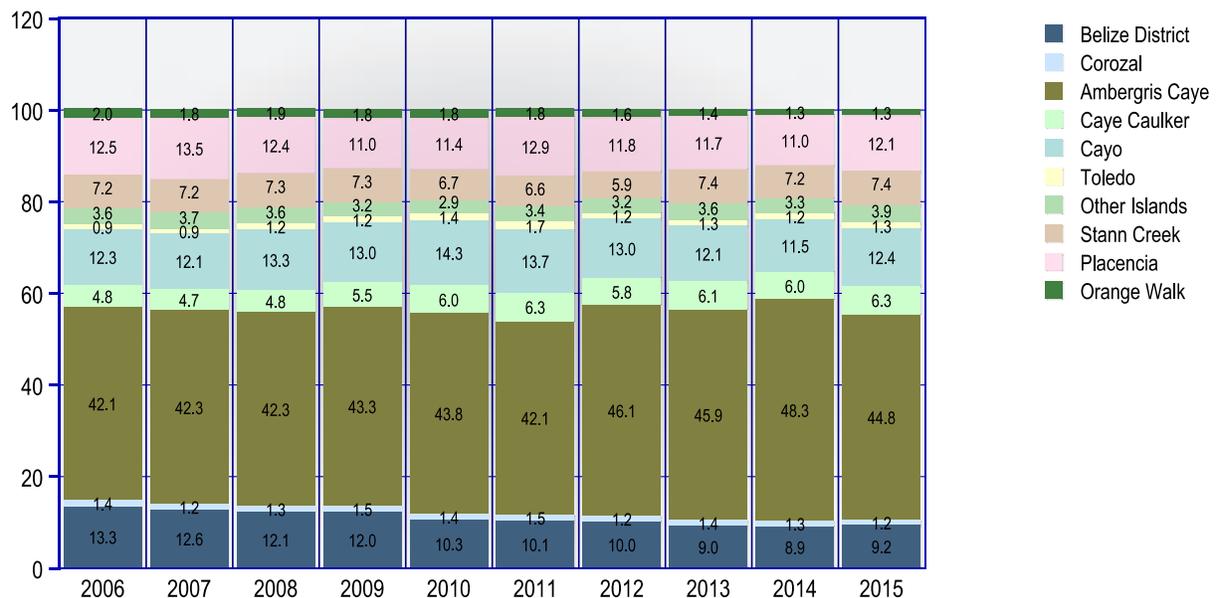
REPORTS ON BELIZE'S ACCOMMODATION SECTOR

TABLE 6.15 ANNUAL REVENUE GENERATED BY AREA (PERCENT SHARE) %

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Belize District	13.3	12.6	12.1	12	10.3	10.1	10	9	8.9	9.2
Corozal	1.4	1.2	1.3	1.5	1.4	1.5	1.2	1.4	1.3	1.2
Ambergris Caye	42.1	42.3	42.3	43.3	43.8	42.1	46.1	45.9	48.3	44.8
Caye Caulker	4.8	4.7	4.8	5.5	6	6.3	5.8	6.1	6	6.3
Cayo	12.3	12.1	13.3	13	14.3	13.7	13	12.1	11.5	12.4
Toledo	0.9	0.9	1.2	1.2	1.4	1.7	1.2	1.3	1.2	1.3
Other Islands	3.6	3.7	3.6	3.2	2.9	3.4	3.2	3.6	3.3	3.9
Stann Creek	7.2	7.2	7.3	7.3	6.7	6.6	5.9	7.4	7.2	7.4
Placencia	12.5	13.5	12.4	11	11.4	12.9	11.8	11.7	11	12.1
Orange Walk	2	1.8	1.9	1.8	1.8	1.8	1.6	1.4	1.3	1.3
Total	100	100	100	100	100	100	100	100	100	100
BZ\$ Million	\$112.70	\$128.20	\$130.30	\$110.00	\$115.00	\$138.00	\$162.00	\$183.00	\$207.00	\$227.24

Ambergris Caye remains the leading source for accommodation revenue generated annually, accounting for close to 45% of total revenue generated in 2015. Cayo was a distant second, generating 12.4% of the accommodation revenue in 2015. Placencia however, has closed the gap on Cayo significantly in this performance category over the past three years, generating just over 12% of the accommodation revenue in 2015.

FIGURE 6.8 ANNUAL REVENUE GENERATED BY AREA (PERCENT SHARE) %



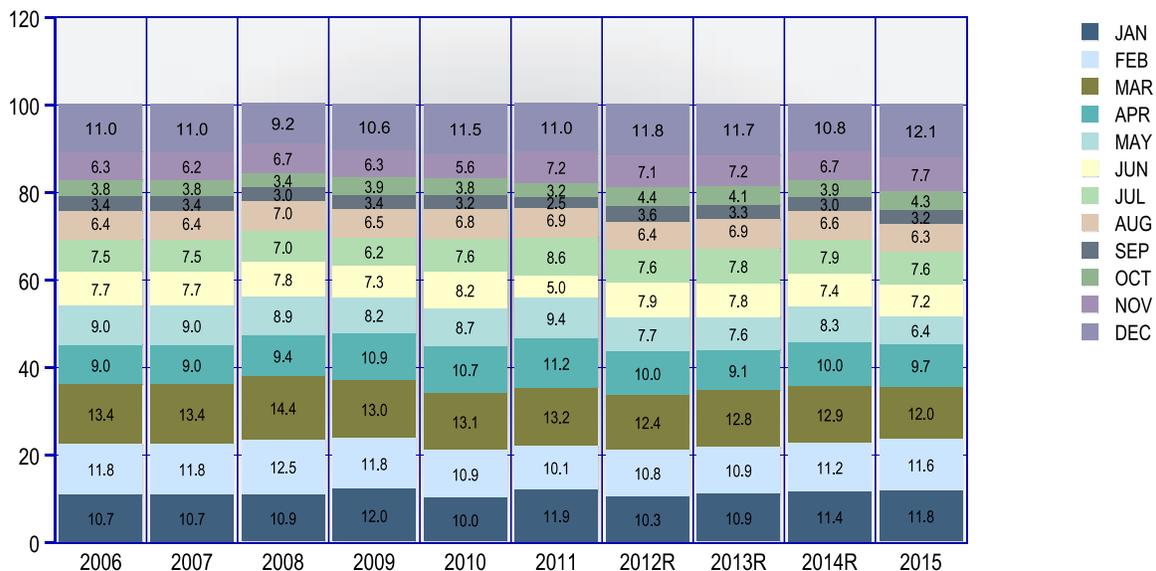
REPORTS ON BELIZE'S ACCOMMODATION SECTOR

TABLE 6.16 REVENUE GENERATED BY MONTH (PERCENT SHARE) %

	2006	2007	2008	2009	2010	2011	2012R	2013R	2014R	2015
January	10.7	10.7	10.9	12	10	11.9	10.3	10.9	11.4	11.8
February	11.8	11.8	12.5	11.8	10.9	10.1	10.8	10.9	11.2	11.6
March	13.4	13.4	14.4	13	13.1	13.2	12.4	12.8	12.9	12
April	9	9	9.4	10.9	10.7	11.2	10	9.1	10	9.7
May	9	9	8.9	8.2	8.7	9.4	7.7	7.6	8.3	6.4
June	7.7	7.7	7.8	7.3	8.2	5	7.9	7.8	7.4	7.2
July	7.5	7.5	7	6.2	7.6	8.6	7.6	7.8	7.9	7.6
August	6.4	6.4	7	6.5	6.8	6.9	6.4	6.9	6.6	6.3
September	3.4	3.4	3	3.4	3.2	2.5	3.6	3.3	3	3.2
October	3.8	3.8	3.4	3.9	3.8	3.2	4.4	4.1	3.9	4.3
November	6.3	6.2	6.7	6.3	5.6	7.2	7.1	7.2	6.7	7.7
December	11	11	9.2	10.6	11.5	11	11.8	11.7	10.8	12.1
Total	100	100	100	100	100	100	100	100	100	100
BZ\$ Million	\$112.70	\$128.20	\$130.30	\$110.00	\$115.00	\$138.00	\$162.00	\$183.00	\$207.00	\$227.24

2015 was the first year in which the majority of the accommodation revenue was generated in December rather than March.

FIGURE 6.9 REVENUE GENERATED BY MONTH (PERCENT SHARE) %



REPORTS ON BELIZE'S ACCOMMODATION SECTOR

TABLE 6.17 REVENUE GENERATED BY QUARTER (PERCENT SHARE) %

Quarter	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
1st Quarter	35.9	35.9	37.8	36.8	34	35.2	32.1	31.7	33.2	35.4
2nd Quarter	25.7	25.7	26	26.4	27.5	25.5	26.5	30.6	31	23.3
3rd Quarter	17.3	17.3	17	16	17.6	18	17.7	22.3	22	17.1
4th Quarter	21.1	21	19.2	20.8	20.9	21.3	23.6	15.4	13.8	24.1
Total	100	100	100	100	100	100	100	100	100	100

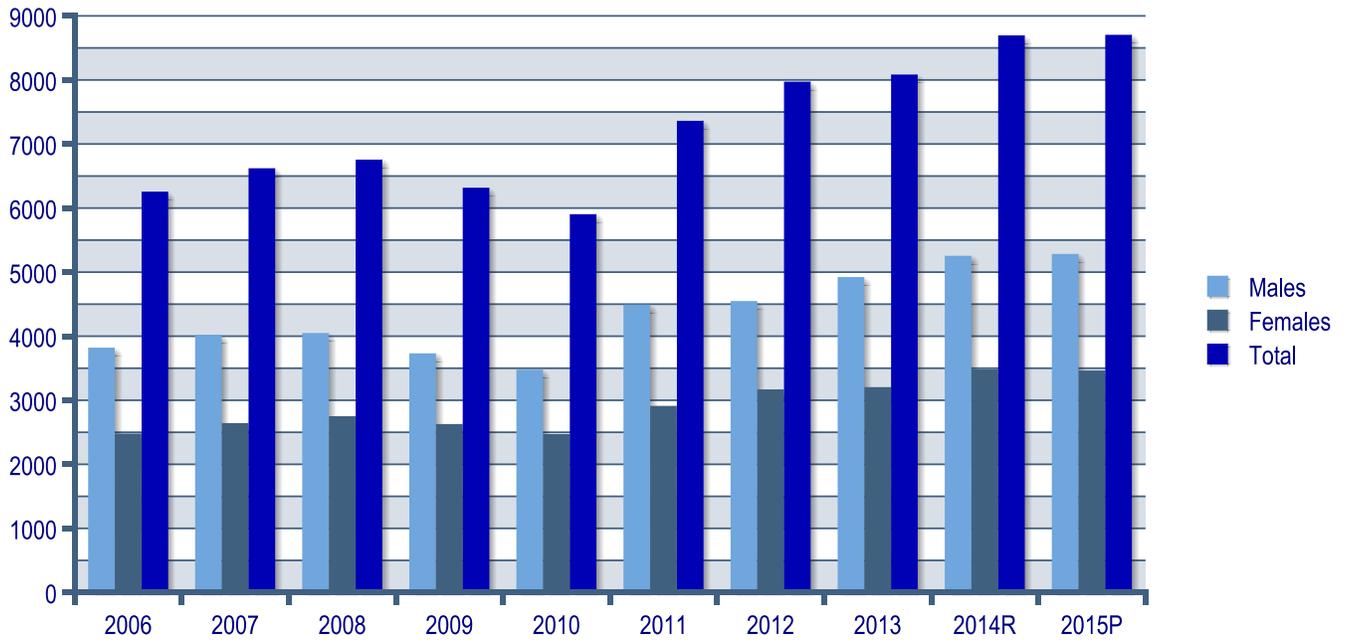
TABLE 6.18 PERSONS EMPLOYED IN THE ACCOMMODATION SECTOR BY GENDER

	2006	2007	2008	2009	2010	2011	2012	2013	2014R	2015P
Males	3778	3980	4006	3690	3434	4451	4806	4880	5213	5241
Females	2436	2600	2708	2586	2429	2869	3126	3162	3440	3422
TOTAL	6214	6580	6714	6276	5863	7320	7932	8042	8653	8663

R= Revised P = Preliminary

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FIGURE 6.11 PERSONS EMPLOYED IN THE ACCOMMODATION SECTOR BY GENDER





BELIZE TOURISM BOARD



SECTION VII

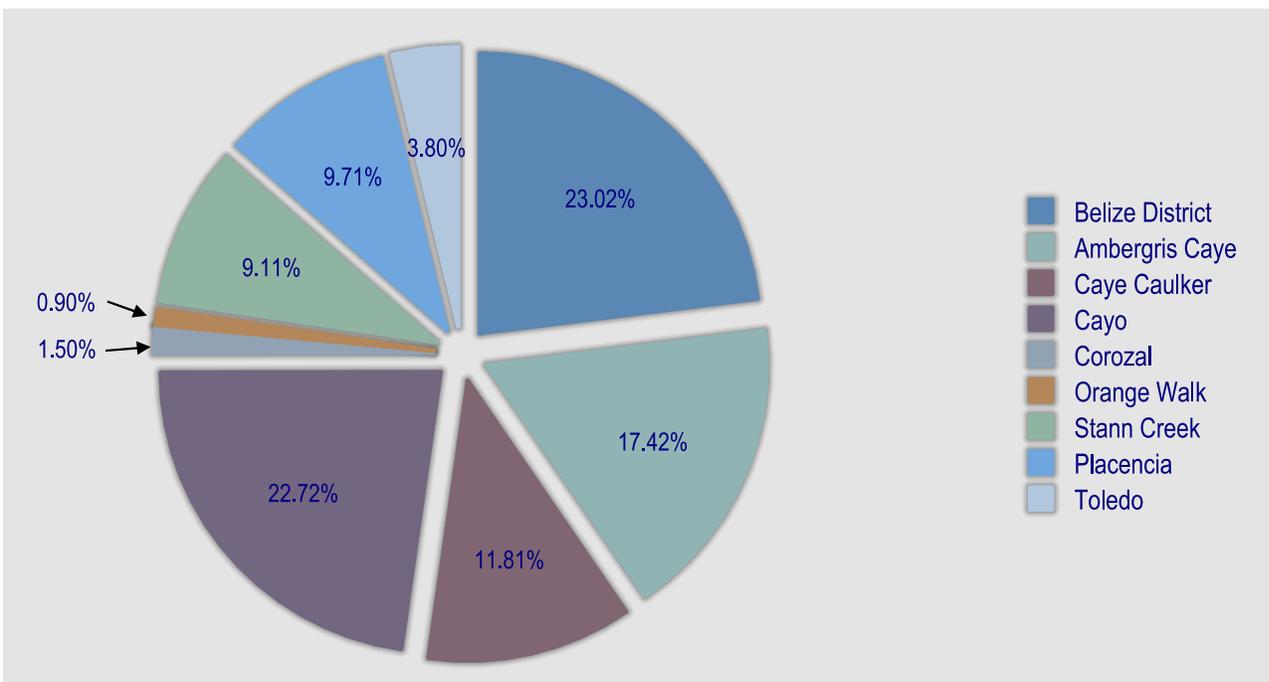
Tourism, Economic, Regional Et Global Reports



TABLE 7.1 NUMBER OF TOUR GUIDES BY AREA

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Belize District	384	391	299	324	330	315	362	409	505	376
Ambergris Caye	178	185	141	129	112	188	252	266	305	260
Caye Caulker	76	78	73	84	81	77	94	106	110	95
Cayo	197	205	197	233	232	215	288	339	396	361
Corozal	31	30	20	24	27	35	44	43	44	55
Orange Walk	50	45	42	37	47	49	60	79	93	91
Stann Creek	102	105	81	68	80	84	79	80	106	85
Placencia	78	85	75	84	80	67	69	98	92	83
Toledo	49	49	48	42	34	57	56	61	83	67
TOTAL	1,145	1,173	976	1025	1023	1087	1304	1481	1734	1473
% change	2.90%	2.40%	-16.80%	5.00%	-0.20%	6.30%	20.00%	13.60%	17.10%	-15.05%

FIGURE 7.1 TOUR GUIDES BY AREA (%)

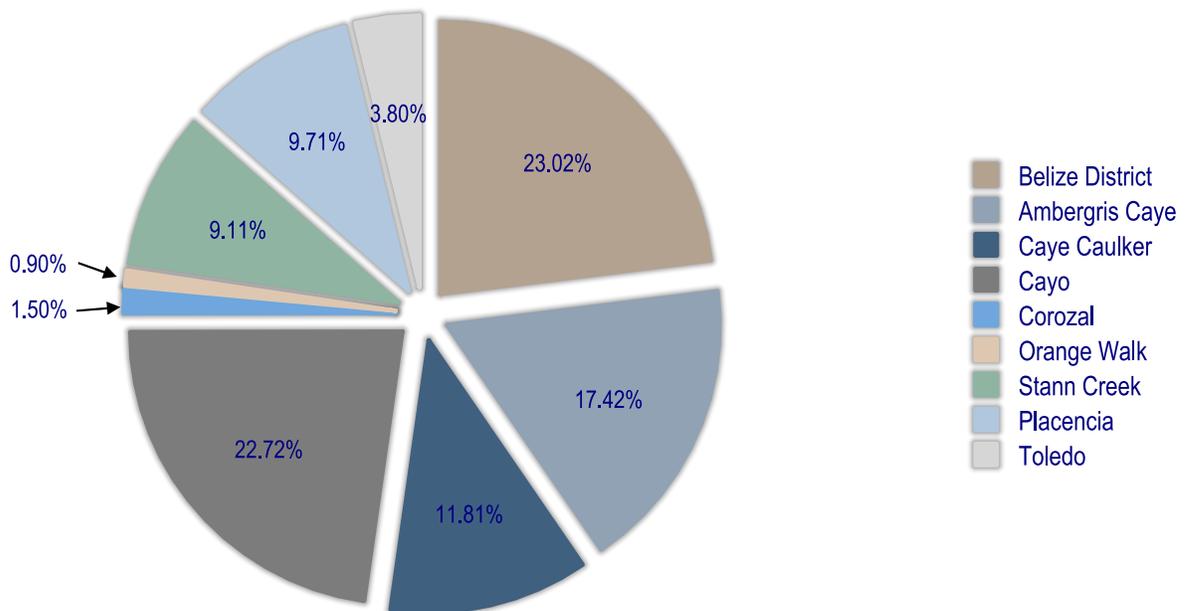


TOURISM, ECONOMIC, REGIONAL & GLOBAL REPORTS

TABLE 7.2 NUMBER OF TOUR OPERATORS BY AREA

AREA	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Belize District	55	58	55	47	49	48	40	50	80	78
Ambergris Caye	31	30	46	45	46	48	40	32	57	59
Caye Caulker	21	20	23	21	19	19	23	24	32	40
Cayo	30	36	42	40	40	53	44	48	70	77
Corozal	2	1	1	1	2	2	3	5	7	5
Orange Walk	1	0	1	2	1	1	2	3	5	3
Stann Creek	20	22	19	19	17	18	26	14	30	31
Placencia	28	28	24	21	19	23	25	20	36	33
Toledo	9	10	11	10	8	12	12	13	15	13
TOTAL	197	205	222	206	201	224	215	209	332	339
% change	-5.70%	4.10%	8.30%	-7.20%	-2.40%	11.00%	-4.00%	-2.80%	58.90%	2.11%

FIGURE 7.2 TOUR OPERATORS BY AREA (%)



TOURISM, ECONOMIC, REGIONAL & GLOBAL REPORTS

TABLE 7.3 ACTIVE INSURED PERSONS BY SEX, DISTRICT, AND SELECTED INDUSTRY 2014

District	Hotel	Air Transport	Sea & Coastal Transport	Inland Water Transport	Taxi, Charters, Excursions, private rentals, etc.	Travel Agencies, Tour Operator, Tourist Assistance Activities	Total
Total	8,653	631	374	91	637	1,496	11,882
Belize	4,305	619	347	79	68	1,034	6,452
Cayo	1,537	7	0	11	146	261	1,962
Corozal	388	0	4	0	90	2	484
Orange Walk	159	4	0	1	131	6	301
Stann Creek	2,007	0	20	0	80	115	2,222
Toledo	257	1	3	0	122	78	461
FEMALE	3,440	162	87	23	54	466	4,232
Belize	1,757	153	82	18	18	336	2,364
Cayo	594	4	0	4	14	79	695
Corozal	144	0	0	0	8	1	153
Orange Walk	77	4	0	1	5	0	87
Stann Creek	772	0	5	0	7	24	808
Toledo	96	1	0	0	2	26	125
MALE	5,213	469	287	68	583	1,030	7,650
Belize	2,548	466	265	61	50	698	4,088
Cayo	943	3	0	7	132	182	1,267
Corozal	244	0	4	0	82	1	331
Orange Walk	82	0	0	0	126	6	214
Stann Creek	1,235	0	15	0	73	91	1,414
Toledo	161	0	3	0	120	52	336

The figures above were received from the Belize Social Security Board. The figures include the number of persons registered to work in specific areas related to tourism, such as air, water and land transport; hotels and travel trade for 2014 and 2015.

Please note the following:

- These employment figures do not include undocumented persons working in the Tourism Industry.
- The figures for Ambergris Caye and Caye Caulker have been included under the region labeled "Belize".
- The 2014 employment data has been revised and reflects the most updated figures available.

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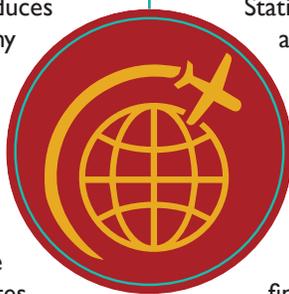
TOURISM, ECONOMIC, REGIONAL & GLOBAL REPORTS

TABLE 7.4 ACTIVE INSURED PERSONS BY SEX, DISTRICT, AND SELECTED INDUSTRY 2015

District	Hotel	Air Transport	Sea & Coastal Transport	Inland Water Transport	Taxi, Charters, Excursions, private rentals, etc.	Travel Agencies, Tour Operator, Tourist Assistance Activities	Total
Total	8,663	666	316	100	697	1,486	11,928
Belize	4,140	655	286	87	67	999	6,234
Cayo	1,559	7	0	11	171	241	1,989
Corozal	458	0	6	0	92	4	560
Orange Wa	208	4	1	2	137	13	365
Stann Cree	1,967	0	21	0	81	127	2,196
Toledo	331	0	2	0	149	102	584
FEMALE	3,422	175	84	24	43	481	4,229
Belize	1,711	168	78	18	13	319	2,307
Cayo	597	4	0	4	13	91	709
Corozal	133	0	1	0	6	2	142
Orange Wa	106	3	0	2	3	6	120
Stann Cree	772	0	5	0	6	27	810
Toledo	103	0	0	0	2	36	141
MALE	5,241	491	232	76	654	1,005	7,699
Belize	2,429	487	208	69	54	680	3,927
Cayo	962	3	0	7	158	150	1,280
Corozal	325	0	5	0	86	2	418
Orange Wa	102	1	1	0	134	7	245
Stann Cree	1,195	0	16	0	75	100	1,386
Toledo	228	0	2	0	147	66	443

TOURISM'S ECONOMIC IMPACT

Tourism's impact extends far beyond airlines (international and local), hotels, tour operators, tour guides, restaurants, nightclubs and souvenir shops. Instead it has a domino effect on the entire economy. In other words, tourism has a direct, indirect, and an induced effect: 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 that 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 and Motivation Survey (VEMS) found in Section III of the Annual Travel and Tourism Statistical Digest. From the VEMS survey results, the average daily expenditure (by type) of overnight tourist visitor, as well as the average visitor length of stay, 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 and the crew members who visited Belize is used in the annual expenditure estimate of the cruise visitors. The expenditure estimate of the overnight and the cruise visitors are taken together as the total tourism expenditure for the year.

ANNUAL TOURISM EXPENDITURE

FIGURE 7.3 TOURISM EXPENDITURE: OVERNIGHT & CRUISE (% SHARE)

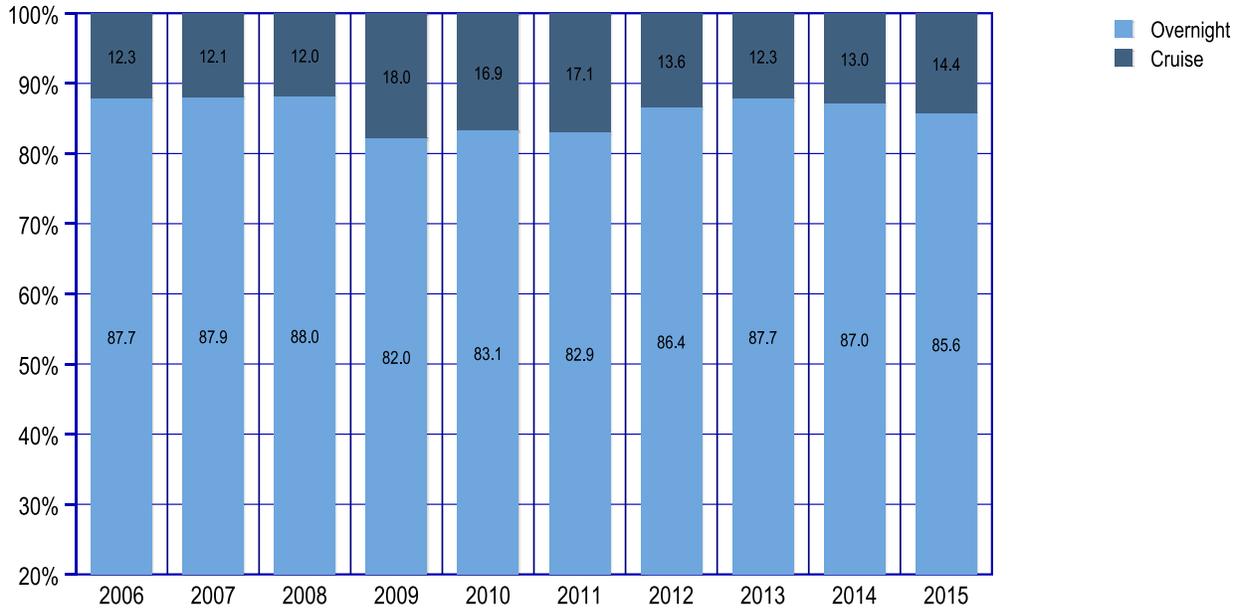
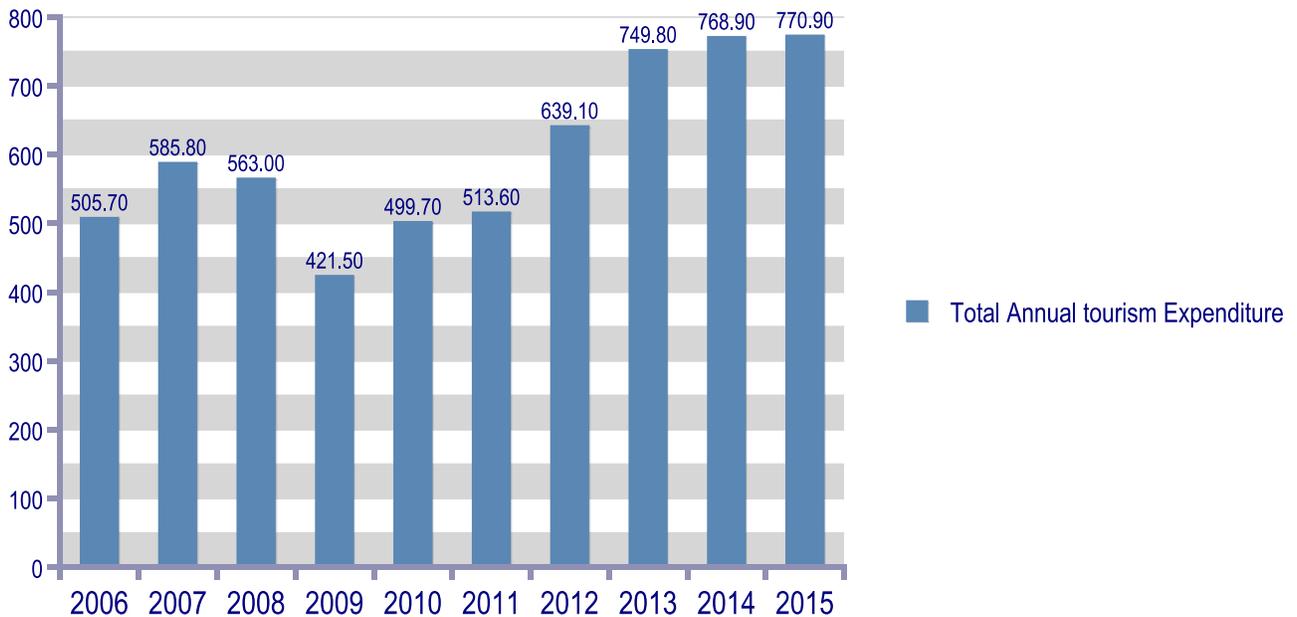


FIGURE 7.4 TOTAL ESTIMATED TOURISM EXPENDITURE: OVERNIGHT & CRUISE (MILLIONS \$BZ)





TOURISM, ECONOMIC, REGIONAL & GLOBAL REPORTS

In 2015, the average length of stay and the average daily expenditure for overnight visitors both contracted compared to the figures in 2014. However, the number of overnight visitors in 2015 increased by over 19,900 compared to the figure in 2014. Hence there was only a small decrease in the 2015 overnight visitor expenditure figure compared to the figure in 2014. The 2015 average daily expenditure for cruise visitors increased slightly compared to the figure in 2014, while the number of cruise passengers decreased by a little over 10,000 passengers. There was a slight increase in the annual cruise expenditure figure in 2015, causing the total annual visitor expenditure in 2015 to increase by 2 million BZD.

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 ...”

Caribbean Tourism Organization

<http://www.onecaribbean.org/about-cto/>

The CTO collects monthly arrival data from the 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:

TOURISM, ECONOMIC, REGIONAL & GLOBAL REPORTS

TABLE 7.5 STAY-OVER ARRIVALS CARIBBEAN 2015

Tourist (Stop-over) Arrivals in 2015						
Destination	Period	Tourist Arrivals	% Change			
			Overall	Winter#	Summer#	
Anguilla	Jan-Dec	73,232	3.3	4.4	2.5	
Antigua & Barbuda *	Jan-Dec	250,450	0.5	-4.9	4.2	
Aruba	Jan-Dec	1,224,935	14.3	19.7	11.8	
Bahamas	Jan-Oct	1,239,673	2.7	6.5	0	
Barbados	Jan-Dec	591,872	13.9	16.2	12.5	
Belize	Jan-Dec	341,124	6.2	-1.2	11.3	
Bermuda *	Jan-Dec	219,809	-2	-5.7	-1	
British Virgin Islands	Jan-Dec	393,018	1.8	1.1	2.3	
Cayman Islands	Jan-Dec	385,379	0.7	4.4	-1.6	
Cuba	Jan-Dec	3,524,779	17.4	14.4	19.6	
Curacao	Jan-Dec	468,442	3.1	9.2	0.2	
Dominica	Jan-Dec	74,474	-8.6	-4.9	-10.6	
Dominican Republic *	Jan-Dec	5,599,859	8.9	6.5	10.3	
Grenada	Jan-Dec	140,735	5.4	4.6	5.8	
Guyana	Jan-Dec	206,819	0.5	7.1	-2.4	
Haiti	Jan-Dec	515,768	10.9	9.8	11.4	
Jamaica	Jan-Dec	2,123,042	2.1	4.9	0.5	
Martinique	Jan-Dec	487,364	-0.4	-3.8	2	
Montserrat	Jan-Dec	8,944	1.6	-8	6.8	
Puerto Rico **	Jan-Nov	1,619,806	5.6	3.8	6.9	
Saint Lucia	Jan-Dec	344,908	2	5.2	0.2	
St. Kitts & Nevis	Jan-Jun	60,927	6.6	10	-0.8	
St. Vincent & the Grenadines	Jan-Dec	75,381	6.6	-0.1	10.5	
Suriname	Jan-Sep	179,748	-4.8	-2.7	-6.3	
Trinidad & Tobago ***	Jan-Dec	439,749	6.6	10.8	4.4	
Turks & Caicos Islands	Jan-Dec	386,052	7.9	9.9	6.6	
US Virgin Islands	Jan-Dec	769,058	5.3	6.3	4.6	

* Non-Residential 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 International Airport in Nevis

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

SOURCE - Data supplied by member countries and available as at May 19, 2016

TOURISM, ECONOMIC, REGIONAL & GLOBAL REPORTS

TABLE 7.6 STAY-OVER ARRIVALS CARIBBEAN BY MAIN ORIGIN MARKET COUNTRY

Tourist Arrivals by Main Market - 2015									
Destination	Period	United States		Canada		Europe		Other	
		Tourists	% ch.	Tourists	% ch.	Tourists	% ch.	Tourists	% ch.
Anguilla	Jan-Dec	47,248	4	3,397	-8.3	7,871	-1.2	14,716	6.6
Antigua & Barbuda *	Jan-Dec	94,617	-0.8	23,270	-16	96,250	5.4	36,313	3.7
Aruba	Jan-Dec	621,386	7.7	44,166	0.9	80,590	0.5	478,793	28.9
Bahamas	Jan-Oct	960,976	1.4	124,419	9	72,371	6.8	81,907	6
Barbados	Jan-Dec	148,067	24.9	74,494	13.2	255,905	10.5	113,406	9.3
Belize	Jan-Dec	215,182	8	24,027	-9	40,943	5.2	60,972	7.7
Bermuda *	Jan-Dec	157,154	-1.4	24,987	-14.3	29,453	6.8	8,215	-0.4
Cayman Islands	Jan-Dec	291,766	1.3	24,299	-2.4	34,182	-6.1	35,132	4.8
Cuba ¹	Jan-Dec	-	-	1,298,863	10.5	893,746	23.1	1,332,170	20.9
Curacao	Jan-Dec	61,593	15.3	18,229	45.5	196,997	5.1	191,623	-4.8
Dominica	Jan-Dec	17,773	-9.3	2,998	-0.1	13,492	-8	40,211	-9.1
Dominican Republic *	Jan-Dec	2,001,909	12.2	745,860	5.6	1,134,370	-4.2	1,717,720	17.1
Grenada	Jan-Dec	40,914	16.4	10,790	-18.4	32,589	4.4	56,442	4.6
Guyana	Jan-Dec	85,118	1.2	24,178	-9.4	11,245	1.2	86,278	2.8
Haiti	Jan-Dec	394,680	-	37,155	-	36,129	-	47,804	-
Jamaica	Jan-Dec	1,344,149	3.7	391,409	-6.8	279,332	7	108,152	5.3
Montserrat	Jan-Dec	2,326	14	540	-20.4	2,611	7.3	3,467	-5.1
Puerto Rico **	Jan-Nov	1,460,735	4.5	19,915	2.8	36,684	12.3	102,472	21.8
Saint Lucia	Jan-Dec	152,738	7	38,677	-6.8	85,486	-8.7	68,007	12.8
St. Kitts & Nevis	Jan-Jun	38,749	5.3	4,021	-20.7	6,039	8.5	12,118	24.9
St. Vincent & the G'dines	Jan-Dec	22,063	11.2	7,515	4.3	21,580	3.8	24,223	5.8
Suriname	Jan-Sep	5,759	-1.1	1,929	54.2	78,882	-5.3	93,178	-5.4
Trinidad & Tobago ***	Jan-Dec	182,111	14.9	53,191	-3.1	68,216	-14.6	136,231	14.2
Turks & Caicos Islands	Jan-Dec	315,247	8.8	36,512	-3.9	11,403	39	22,890	3.3
US Virgin Islands **	Jan-Oct	654,454	6.8	4,594	-12.4	16,961	9.3	29,959	-1.7

* 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 International 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.		SOURCE - Data supplied by member countries and available as at May 19, 2016
N.B: Figures are subject to revision by reporting countries.		

TABLE 7.7 CRUISE PASSENGER ARRIVALS CARIBBEAN

Destination	Period	2015	2014	% ch.
Antigua & Barbuda	Jan-Dec	644,314	522,342	23.4
Aruba	Jan-Dec	607,019	667,095	-9
Bahamas	Jan-Oct	3,627,823	3,867,574	-6.2
Barbados	Jan-Dec	586,615	557,898	5.1
Belize	Jan-Dec	957,975	968,131	-1
Bermuda	Jan-Dec	377,454	356,093	6
Bonaire	Jan-Sep	133,814	76,816	74.2
British Virgin Islands	Jan-Dec	516,436	360,891	43.1
Cayman Islands	Jan-Dec	1,716,812	1,609,555	6.7
Cozumel (Mexico)	Jan-Dec	3,396,072	3,404,858	-0.3
Curacao	Jan-Dec	565,844	629,145	-10.1
Dominica	Jan-Dec	279,474	286,575	-2.5
Dominican Republic	Jan-Dec	528,999	435,494	21.5
Grenada	Jan-Dec	280,518	235,140	19.3
Haiti	Jan-Dec	673,501	662,403	1.7
Jamaica	Jan-Dec	1,568,702	1,423,797	10.2
Martinique	Jan-Dec	241,623	177,786	35.9
Puerto Rico	Jan-Dec	1,457,173	1,356,822	7.4
Saint Lucia	Jan-Dec	677,394	641,452	5.6
St. Maarten	Jan-Dec	1,901,617	2,001,996	-5
St. Vincent & the Grenadines	Jan-Dec	82,079	85,170	-3.6
Trinidad & Tobago	Jan-Jun	44,949	22,033	104
Turks & Caicos Islands	Ja-Dec	929,737	971,838	-4.3
US Virgin Islands	Jan-Dec	1,878,847	2,083,890	-9.8

UNITED NATIONS WORLD TOURISM ORGANIZATION REPORTS

“The World Tourism Organization (UNWTO) is the United Nations agency responsible for the promotion of responsible, sustainable and universally accessible tourism. UNWTO generates market knowledge, promotes competitive and sustainable tourism policies and instruments, fosters tourism education and training, and works to make tourism an effective tool for development through technical assistance projects in over 100 countries around the world. UNWTO’s membership includes 156 countries, 6 Associate Members and over 400 Affiliate Members representing the private sector, educational institutions, tourism associations and local tourism authorities.”

- UNWTO <http://www2.unwto.org/content/who-we-are-0>

The United Nations World Tourism Barometer provides an overview of global international tourism travel. A summarized version of the World Tourism Barometer is made available on the UNWTO’s website, and excerpts from this publication can be seen below: <http://mkt.unwto.org/barometer>

FIGURE 7.5 WORLD ANNUAL INBOUND TOURISM INTERNATIONAL ARRIVALS

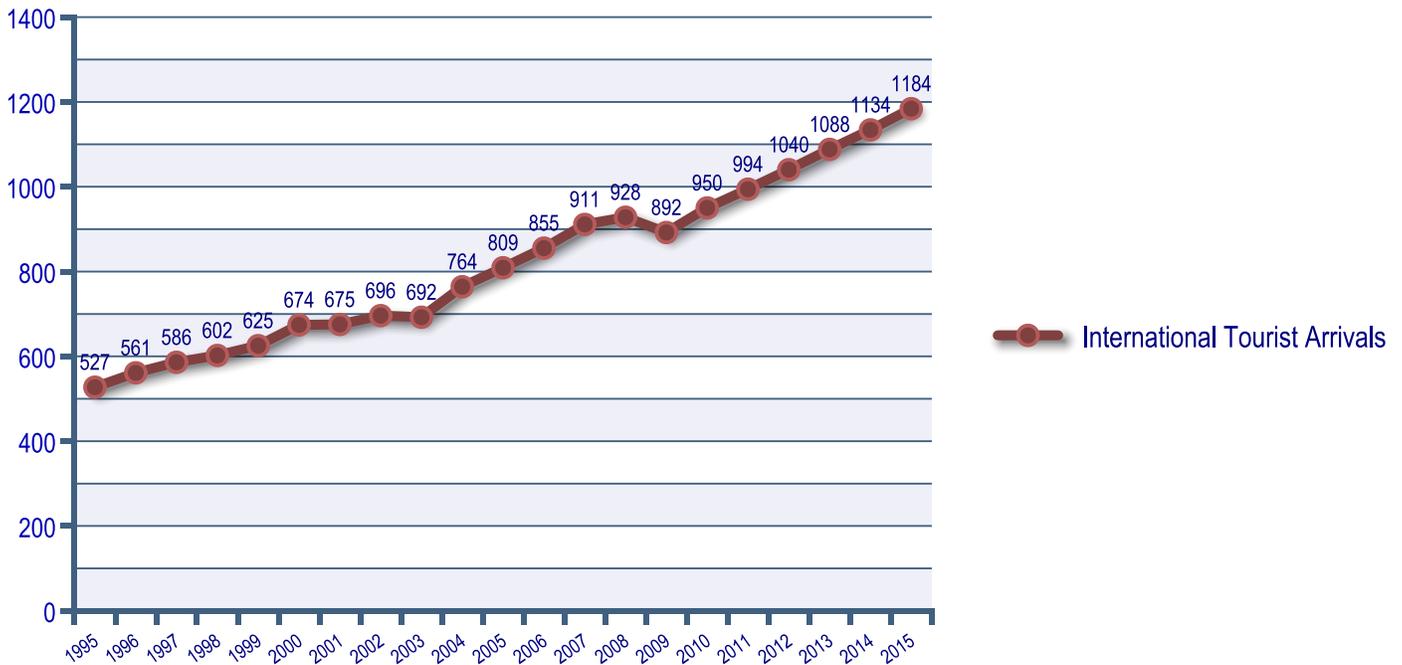
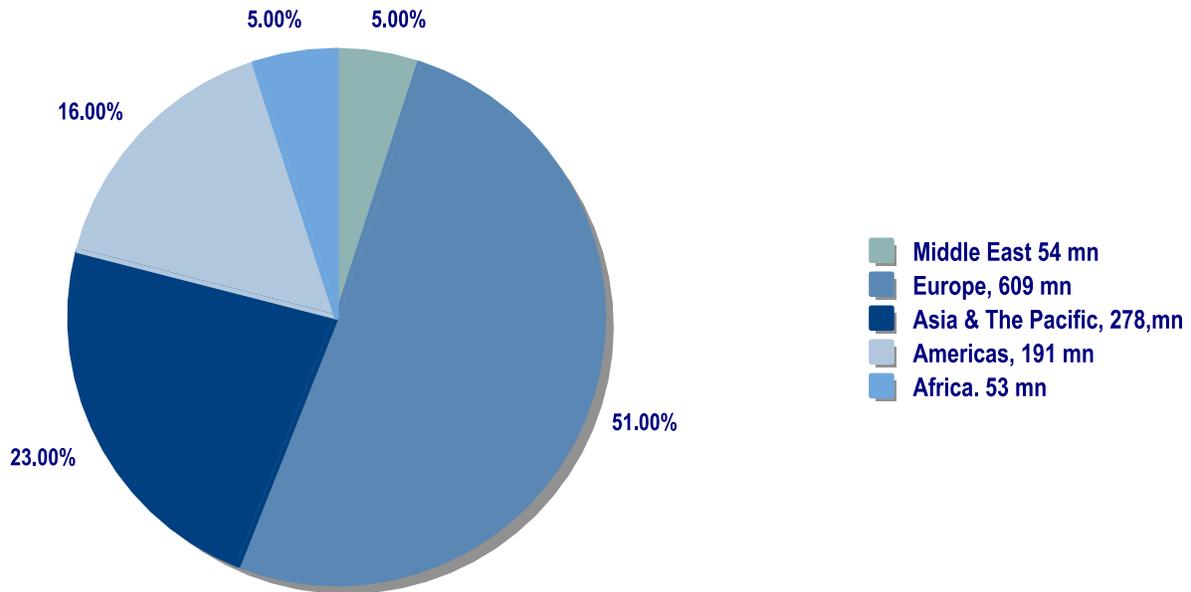
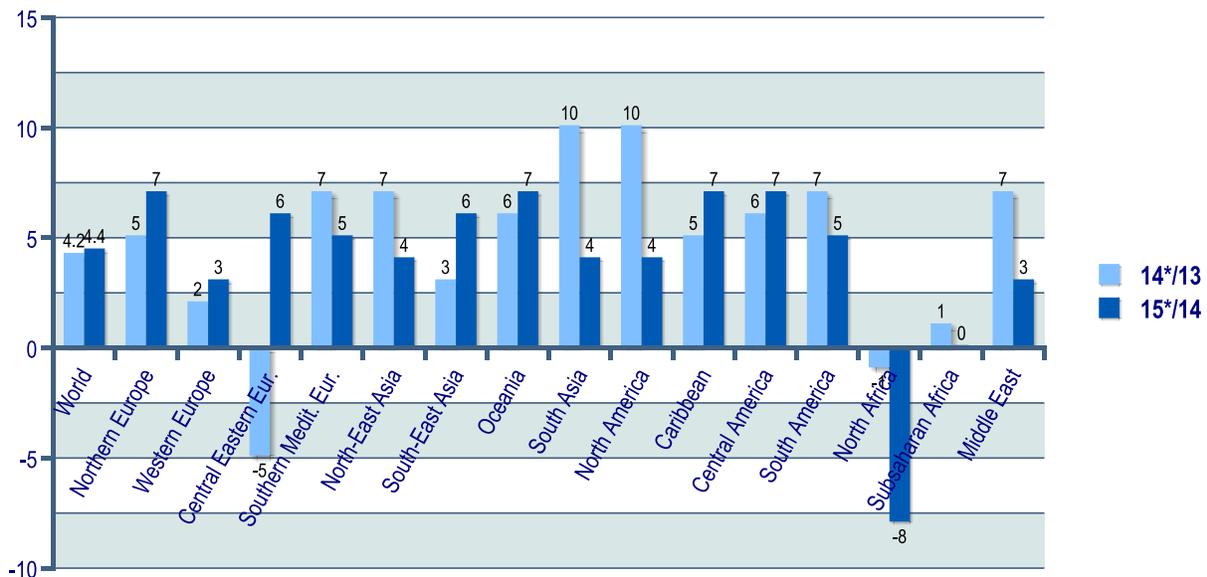


FIGURE 7.6 WORLD INBOUND TOURISM INTERNATIONAL ARRIVALS



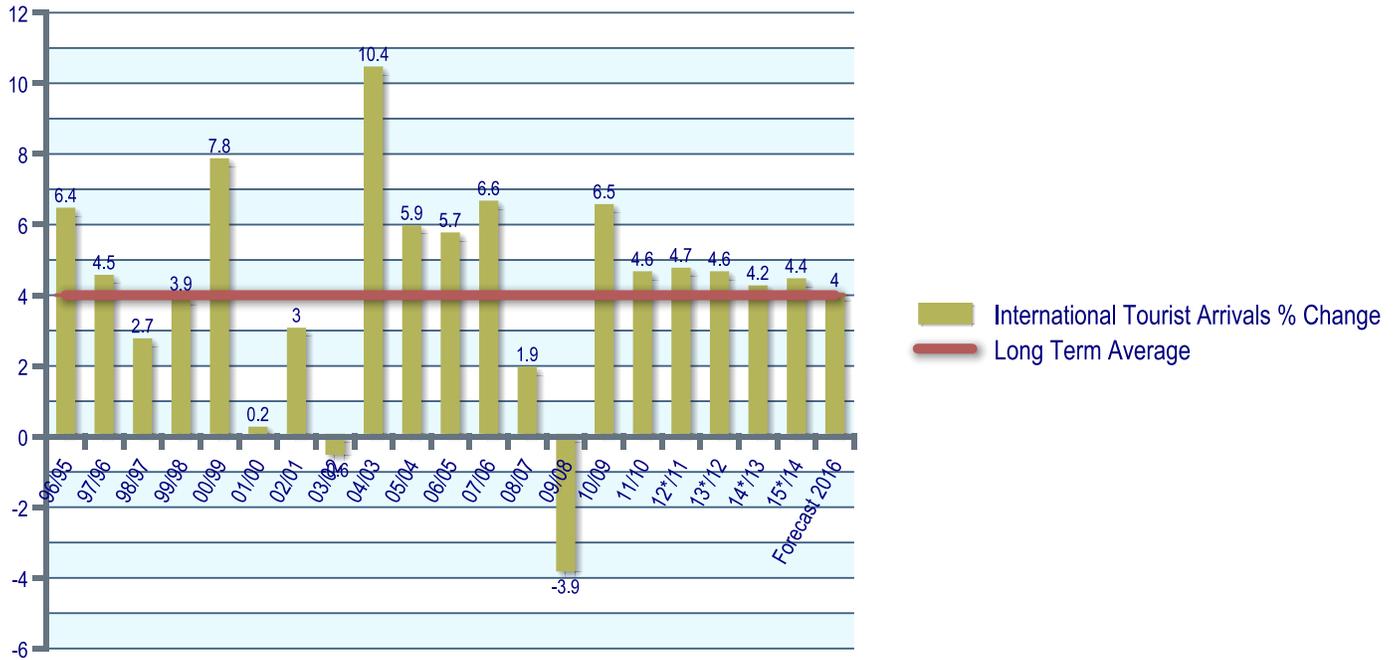
In 2015 Global International tourist arrivals reached 1,184 million which was a 4.4% increase over the figure of last year. The Caribbean, Central America, Oceania and Northern Europe all had increases in international arrivals of more than 7% in 2015. South-East Asia, and Central and Eastern Europe; were all regions with increases in arrivals greater than 6%.

FIGURE 7.8 WORLD INBOUND TOURISM INTERNATIONAL ARRIVALS



TOURISM, ECONOMIC, REGIONAL & GLOBAL REPORTS

FIGURE 7.9 WORLD INBOUND TOURISM INTERNATIONAL ARRIVALS



The UNWTO projects global international tourist arrivals to increase somewhere between 3.5% and 4.5% in 2016.

TABLE 7.8 OUTLOOK FOR (GLOBAL) INTERNATIONAL TOURIST ARRIVALS - UNWTO

	2008	2009	2010	2011	2012	2013	2014	2015	Average a Year 2005-2014	Projection 2016* Between
World	1.9%	-3.9%	6.5%	4.6%	4.7%	4.6%	4.2%	4.4%	3.8%	+3.5% and +4.5%
Europe	0.3%	-5.1%	3.1%	6.4%	3.9%	4.8%	2.4%	4.9%	2.8%	+3.5% and +4.5%
Asia and the Pacific	1.1%	-1.6%	13.2%	6.2%	7.1%	6.9%	5.8%	5.0%	6.2%	+4% and +5%
Americas	27.0%	-4.7%	6.3%	3.6%	4.5%	3.1%	8.4%	4.9%	3.5%	+4% and +5%
Africa	29.0%	4.6%	9.3%	-0.7%	4.6%	4.4%	0.3%	-2.9%	5.2%	+2% and +5%
Middle East	20.0%	-5.4%	13.1%	-9.6%	2.2%	-2.9%	6.7%	28.0%	5.1%	+2% and +5%