

STATE OF THE INDUSTRY

TOURISM

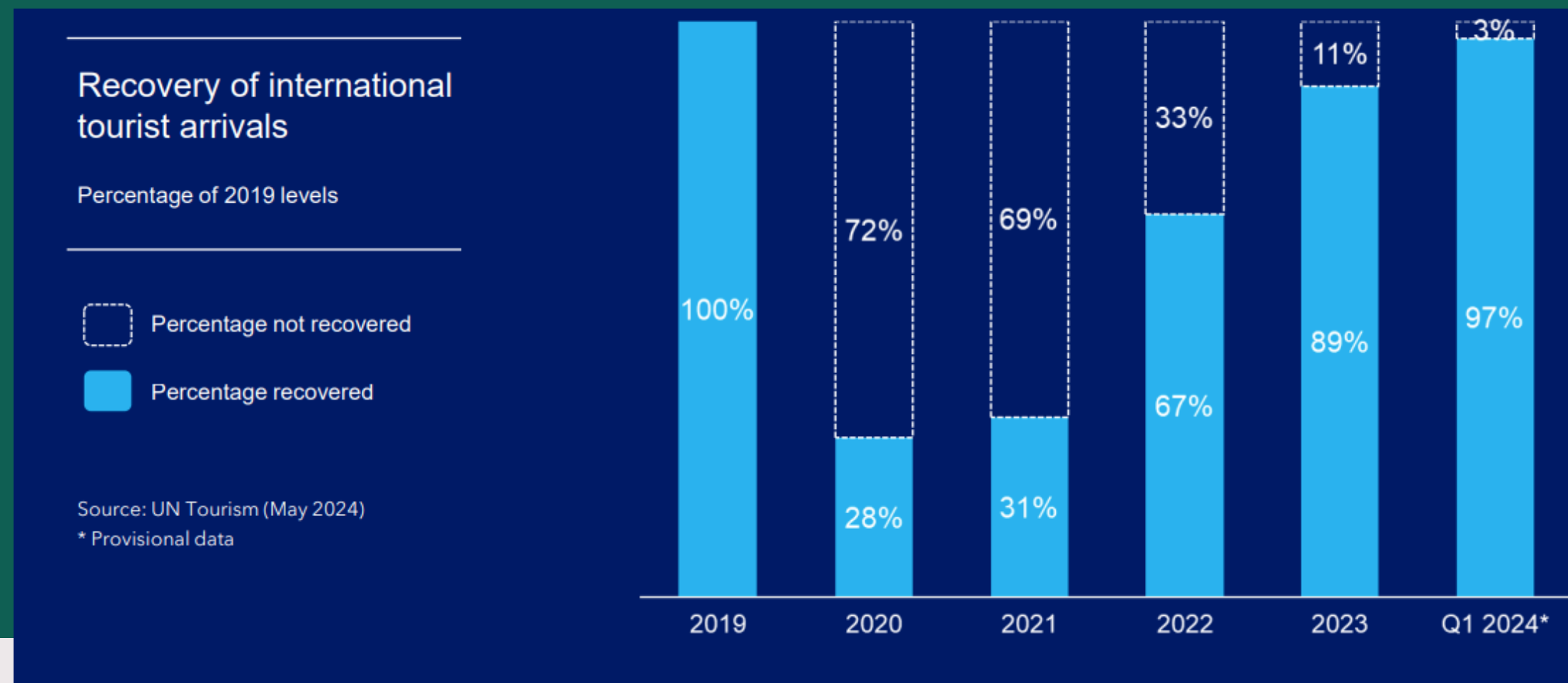
September 2024



OUTLOOK 2024-GLOBAL

Global tourism expected to fully recover and grow by 2% over 2019 figures in 2024

- Central America and Caribbean among the leaders in growth. (99% Recovery in QTR 1 of 2024)
- Strong demand, increased air connectivity, and visa facilitation are fueling this growth
- Cruise tourism has grown 7% above 2019 passenger figures in the first half of 2024, with the Caribbean being the most visited region



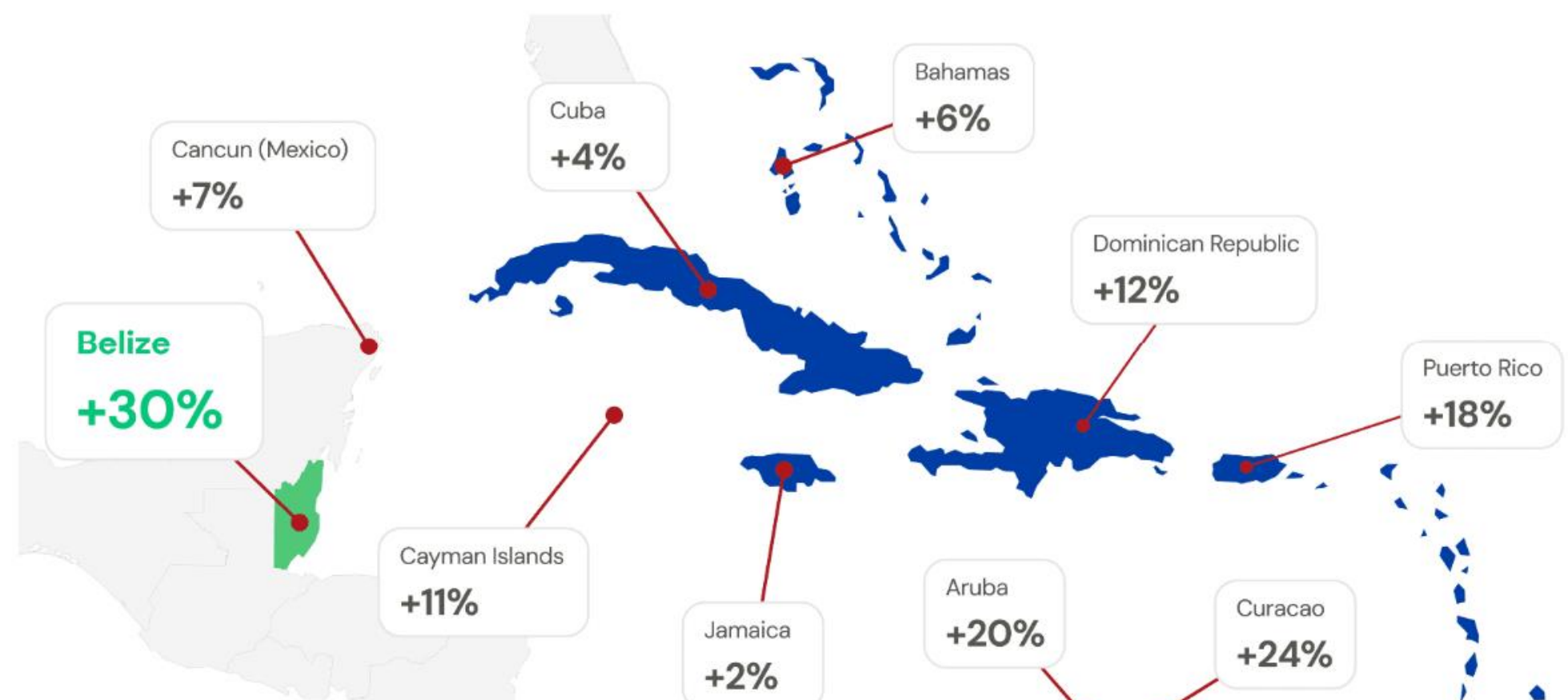
A GLOBAL FORCE FOR GROWTH

OUTLOOK 2024- BELIZE

Belize Fastest Growing Caribbean Destination

- In 2023, Belize received 464,000 tourists (a 93% recovery from 2019)
- All first six months of 2024 have been record breaking months in arrivals
- Largely due to boost in air connectivity, increase in visitor trends favoring Belize, and increases in LAC visitors
- 2024 projected to generate around \$1.4 billion in revenues

Year-Over-Year Tourism Growth 2023 to 2024



RECORD BREAKING YEAR

OUTLOOK 2024- BELIZE

A New Vision for Cruise Tourism
in 2024 and beyond

- In 2023, Belize received over 903,000 cruise visitors from 309 cruise calls, an increase of 47% compared to 2022
- An updated Cruise Tourism Policy has been approved, with a vision towards **2.3 million** cruise passengers by 2033
- Government is working on berthing facilities in the Belize and the Stann Creek districts to support cruise tourism growth in Belize



PATH TO 2.3 MILLION CRUISERS

AIR CONNECTIVITY DRIVING RECORD GROWTH



Belize is directly connected to over 21 cities, with San Francisco being the latest addition

8.8% year-over-year rise in seat capacity, surpassing global average of 6.6%



We saw a 35% increase in airlift in Belize.

- **Jet Blue** from New York started in December 2023
- **Southwest** commenced from Baltimore in March 2024, and increased flights from Houston for the summer
- **American Airlines** increased services from Charlotte, and Miami
- **Alaska Airlines** increased daily service from LA, and seasonal services from Seattle
- **West Jet** increased flights from Calgary and Toronto
- **Delta** increased services from Minneapolis
- **Copa Airlines** added a second flight from Panama
- **United** increased services from Houston, Newark and Chicago. It also recently announced San Francisco

TOURISM INVESTMENT

Over \$600 million in hotel investments

- Four Seasons
- Margaritaville
- Golden Bay
- Best Western Biltmore
- Fort George Hotel
- Island Magic Villas
- Hyatt
- Sheraton
- Caye Caulker Villas





The Work Continues....

- Leader in Sustainability
- Targeted Marketing
- Product Development
- Strategic Priorities

LEADER IN SUSTAINABILITY

Updated National Sustainable Tourism Master Plan

A national recommitment to responsible and sustainable tourism in Belize.

September 2024

Belize will host the first ever World Sustainable Travel and Hospitality Awards.

Major Recognitions

Belize has won various awards in sustainability and hospitality including:

- Travel & Leisure
- Conde Nast Traveller
- Travel Weekly

Tourism development in Protected Areas

BTB and PACT signed a 3-year co-financing partnership valued at 2.5 million dollars to develop tourism products and services at our protected areas.





TARGET MARKETING

Positioning Belize as a premier destination for eco-adventure, and diverse natural and cultural experiences.

Strategic focus on:

- North America
- Latin America*
- Europe
- Regional Integration (CTO, SITCA, CATA, OMM)

**New marketing firm TM Americas making progress in Mexico.*

**Removal of Departure Fees at land borders for 5 Southern Mexican States. (Chiapas, Tabasco, Yucatan, Campeche, Quintana Roo)*

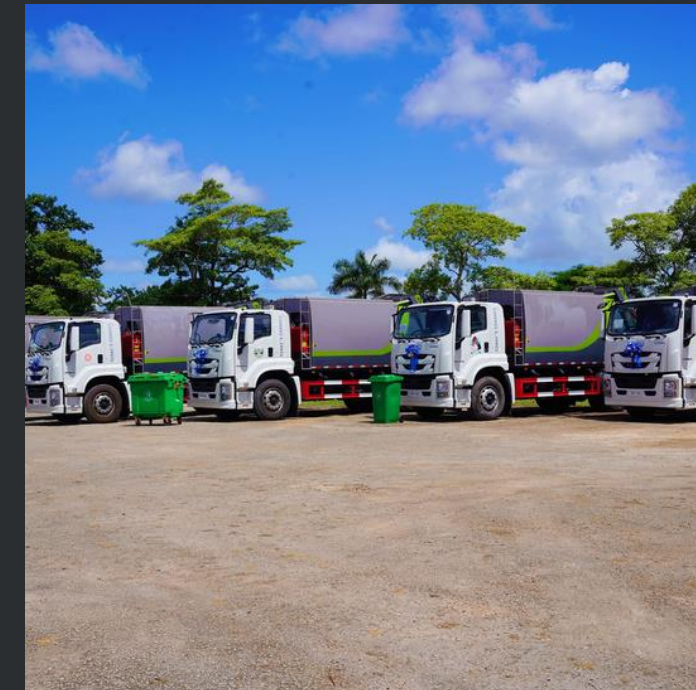
PRODUCT DEVELOPMENT

Transformative Road Upgrades

Coastal Road - Caracol Road - Sarteneja Road - Lubaantun - Secret Beach - Cemetery Road - Hopkins Road

Urban Enhancement and Auxiliary Services in Tourism

- Solid Waste Management Enhancement in Tourist Destinations
- Improvement of Health Care Services (Placencia Polyclinic, KMHM)
- Caye Caulker Tarpon Cove
- San Jose Succotz Multipurpose Center
- Seine Bight Cultural Center
- Belize City Fish Market
- Rehabilitation Center for Manatees in Gales Point
- El Cayo Boardwalk and Santa Elena River Park project
- Corozal Bay upliftment project
- San Pedro Artisan Market
- Punta Gorda Cultural Center
- Mahogany Street Marketplace



PRODUCT DEVELOPMENT

Cultural Tourism Development

Cultural Tourism Trails - Tourism MSME Support (Grants) - Fort George Artisan Alley-Festivals

Nautical Tourism Development

PG Marina Project - Development of a Nautical Tourism Legislation

Music and Entertainment Tourism

Belize Music Project - Belize International Music and Food Festival - Carnival

Sports Tourism

Fishing Tournament - Cycling - Boxing - Football - Volleyball



TRAINING AND CAPACITY DEVELOPMENT



Elevate Training Program

Relevant and Affordable Training for the Industry with over 1200 persons trained in 2023

- Customer Service, Hospitality and Leadership
- Food and Beverage Management
- Bartending
- Tour Package Development
- Safety and Security
- Business Management
- Tour Guiding

Peru- Culinary Exchange and Training

October 2024

Elevate Training Academy

Launching early 2025.



Strategic Priorities

- Implementing the Updated National Sustainable Tourism Masterplan and Cruise Tourism Policy
- Build Diaspora Relations
- Border Improvements

2024-2025



NATIONAL SUSTAINABLE TOURISM MASTER PLAN

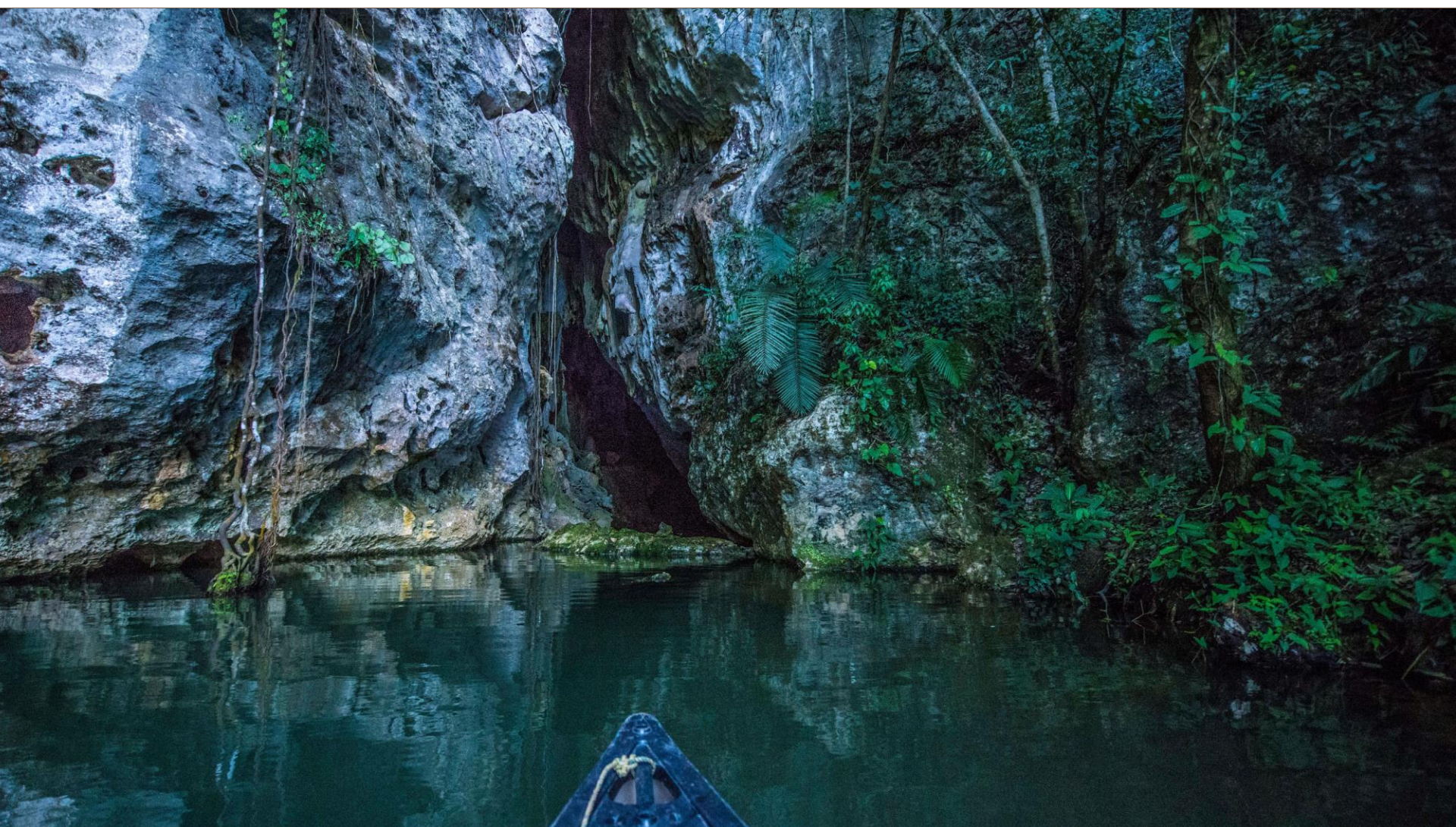
A REDEFINED 2030 VISION

Following thorough review of documentation and stakeholder liaison, the following updated 'succinct' Vision Statement has been tabled:

Grow tourism in Belize in a way that considers all elements, benefits its diverse peoples, respects its rare natural & cultural environment, and contributes to the country's economic development and competitiveness.



UPDATED NATIONAL SUSTAINABLE TOURISM MASTER PLAN



CONTEMPORARY THEMES

National Parks and Protected Areas (Terrestrial Areas)

Cultural Attractions and Archaeological Sites

Trunk Infrastructures and Connectivity -Accessibility

Urban Settlement & Management

Coastal Conditions & Resilience

Marine, Reef and Caye Condition

Regional Linkages and Frontier Interfaces

Tourism Governance Management and Marketing



DIASPORA - BUILDING BELIZE

Impact Driven

- In 2023, over \$220 Million dollars in Remittances
- Almost \$2 Million dollars in Donations

Diaspora Engagement

- Houston
- London
- Los Angeles
- New York
- Chicago
- Las Vegas
- San Antonio, Texas



BORDER IMPROVEMENTS

Impact Driven

- Infrastructural Improvements at our Land and Sea Border Points
 - PG Marina
 - New Services to Chetumal via San Pedro
- Improvement of Visitor Management Systems and Digitalization



THANK YOU



MINISTRY OF TOURISM
& DIASPORA RELATIONS

September 2024