TOURISM BELIZE

Investment Overview

Direct Flights as an Investment Driver

Tourism Growth Belize

Direct flights boost tourism by making destinations more accessible, reducing travel time and cost, and attracting more visitors (tourists).

Tourism directly drives occupancy rates, average daily rates (ADR), and property investment demand.

Flights → Tourism → Occupancy and Demand = ROI

More Direct Flights lead to More Tourists, which creates High Demand for Accommodation, ultimately increasing rental income ROI.

Direct Flights Belize Investment

$$\%\Delta ROI \approx \epsilon_{ROI,R} \cdot \epsilon_{R,T} \cdot \epsilon_{T,DF} \cdot \%\Delta DF$$

Increased Flights → Higher Tourism → Occupancy and Demand

Increased Flights = More Tourists

- Increased direct flight capacity (%ΔDF) makes the destination easier to reach, leading to a rise in tourist arrivals (ϵT, DF).

More Tourists = Higher Revenue

- More tourists (ΔT) drive up the demand for vacation rentals, which increases both the occupancy rate and the average daily rate, thus increasing the gross rental revenue (ϵR, T).

Higher Revenue = ROI (Return on Investment)

- Higher rental revenue (ΔR) directly translates into a higher Net Profit and thus a higher Return on Investment (ϵROI, R).

Direct Flights Belize Investment

Increased Flights → Higher Tourism → Occupancy and Demand

1. Direct Flights Reduce Travel Barriers

- Direct flights simplify travel — fewer layovers, shorter travel time, and less hassle.
- This reduction makes destinations more appealing.

Example: A new nonstop route to Belize can instantly open the market to thousands of travelers.

2. Direct Flights Expand Market Reach

- When airlines introduce new routes, they connect a destination to new travelers.
- Each new origin city adds potential tourism demand — from that city, and from the surrounding region.

Effect: Increased accessibility = expanded exposure = higher visitor numbers.

3. Flights Stimulate Economic Growth

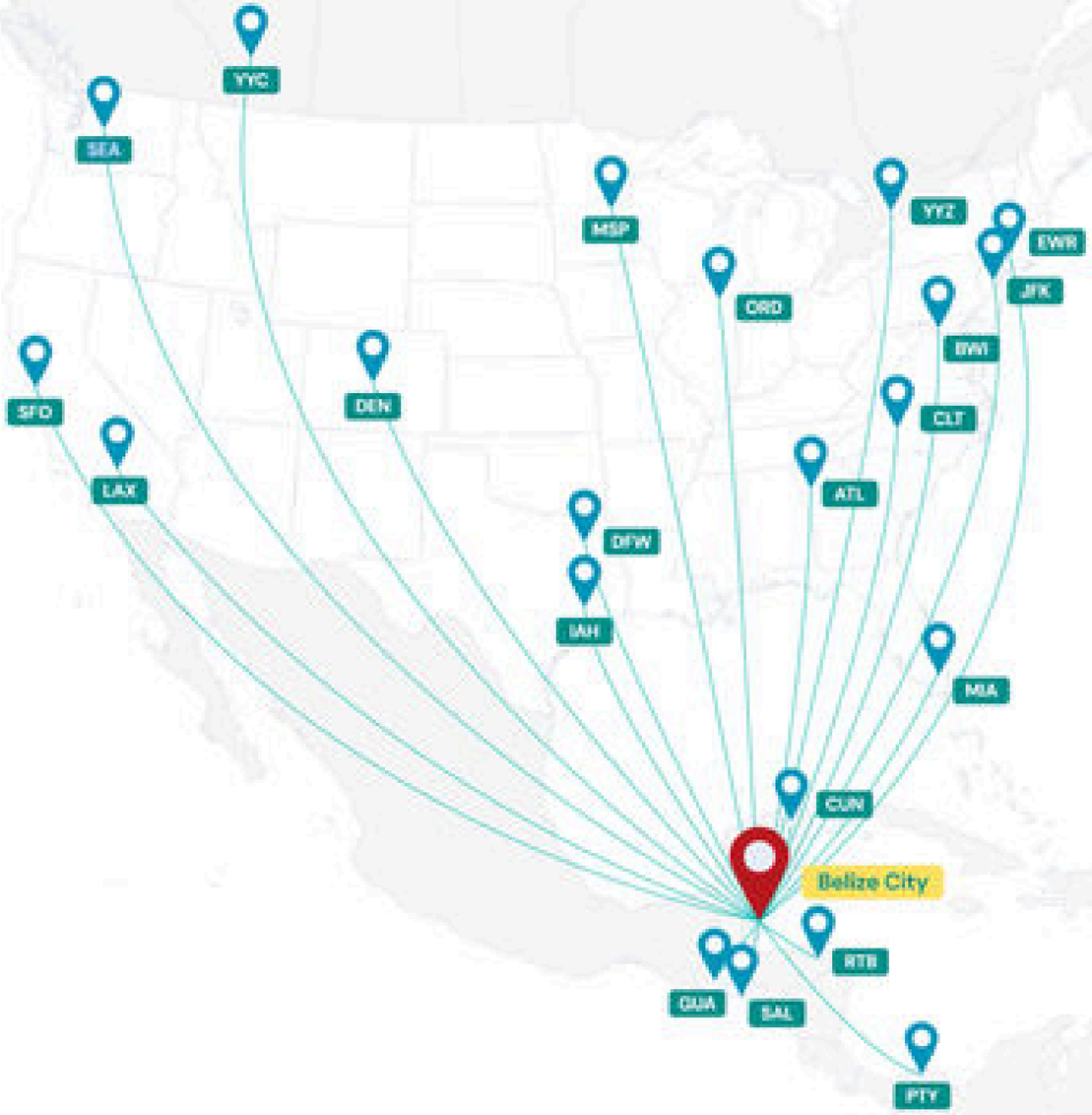
- Tourism growth from new flights ripples through the economy, as more tourists spend.
- For tourism-dependent economies like Belize, this can translate into measurable GDP growth.

Industry studies show that every 10% increase in air connectivity can raise tourism arrivals by 4–8%.

4. Multiplier Effect on Lodging & Real Estate

- The boost in tourism from direct flights directly benefits the vacation rental and real estate market.
- Higher occupancy, better rental yields, and rising investor interest often follow improved air connectivity.

New direct flights from cities like Denver, Seattle, and Toronto → +15 to 20% growth in tourism arrivals → +15 to 20% growth in tourism arrivals → Higher demand for short-term rentals and beachfront investments.



International Direct Flights to Belize

From USA & Canada

Air Canada
Toronto (4h 15m)

Alaska Air
Los Angeles (5h)
Seattle (7h)

American Airlines
Charlotte (3h 24m)
Dallas (2h 50m)
Los Angeles (5h)
Miami (2h)

Delta Airlines
Atlanta (3h 11m)
Minneapolis (4h 45m)

JetBlue
New York (4h 45m)

Southwest
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Denver (5h)
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Sun Country
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From Latin America & Mexico

COPA
Panama City (2h 20m)

TAG
Guatemala City (1h)

Tropic Air
Cancun (1h 45m)
Guatemala Guatemala City (1h)
Roatan (55m)
San Salvador (55m)

belize

Impact of Direct Flights on Tourism

$$T = \alpha + \beta_1 F + \epsilon$$

Where:

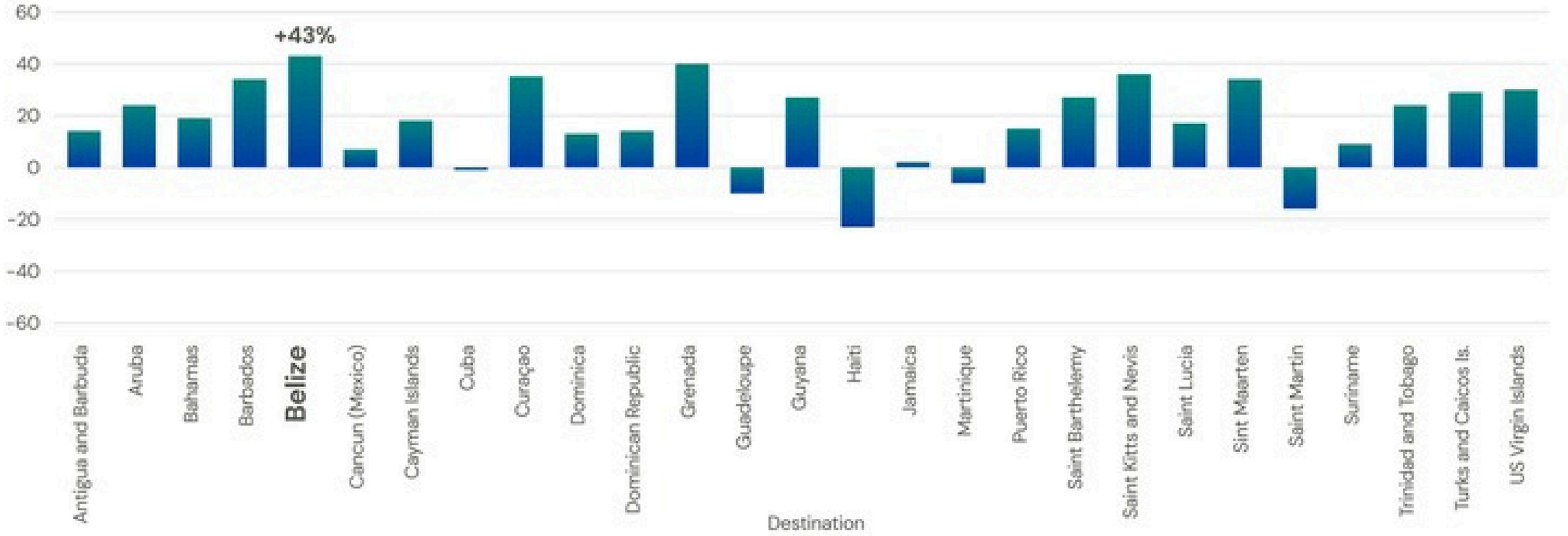
- T = number of tourist arrivals
- F = number of direct flights (or available seats/capacity)
- $\beta_1 > 0$ = marginal effect of an additional flight on tourism (elasticity)
- α = baseline tourism level without new flights
- ϵ = other external factors (marketing, global economy, etc.)

Interpretation: For every 1% increase in direct flights, tourist arrivals increase by approximately B1% — typically in tourism-dependent economies like Belize, elasticity values range from 0.3 to 0.8, meaning a 10% increase in flights might boost arrivals by 3–8%.

Caribbean Seat Capacity

ForwardKeys Seat Capacity includes information on scheduled direct flights and their seat capacity for different destinations.

Airline capacity reflects the planned total seat capacity airlines expect to offer. Change in seat capacity is a reflection of the supply and demand for a destination.



Overseas travel in the Caribbean region:
Tourist arrivals and scheduled seat capacity by destination, H1 2024 vs 2023

International Route Network

2010

7 Cities 3 Countries 6 Airlines

Atlanta
Charlotte
San Salvador
Dallas
Houston (IAH)
Miami
Flores

2025

21 Cities 7 Countries 11 Airlines

Atlanta
Baltimore
Calgary
Cancún
Charlotte
Chicago
Dallas
Denver
Guatemala City
Houston (IAH & HOU)
Los Angeles
Minneapolis
Miami
New York
Newark
Panama City
Roatán
San Francisco
NEW
San Pedro Sula
Seattle

rouge
Alaska
American Airlines
CopaAirlines
DELTA
jetBlue AIRWAYS
Southwest
suncountry airlines
TagAirlines
TROPIC AIR
UNITED
WESTJET
Continental Airlines
TACA

Caribbean Destination

Tourism Arrivals & Seat Capacity % Change 2024 vs 2023

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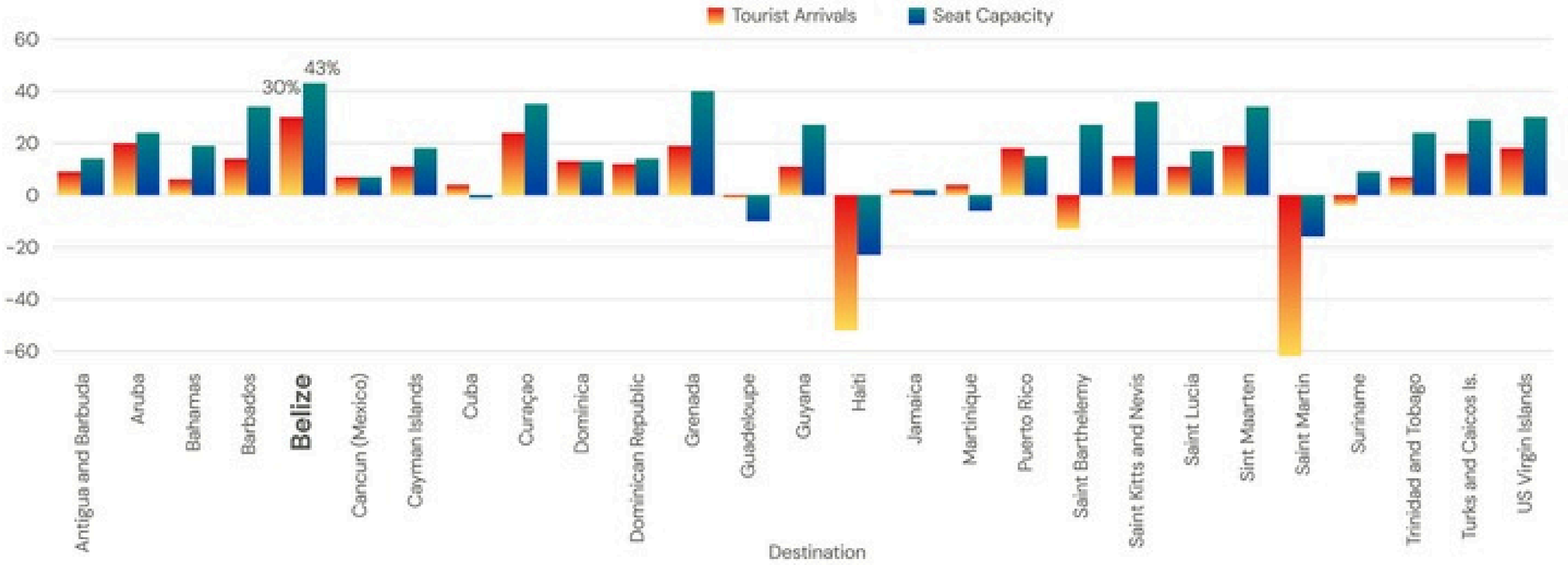

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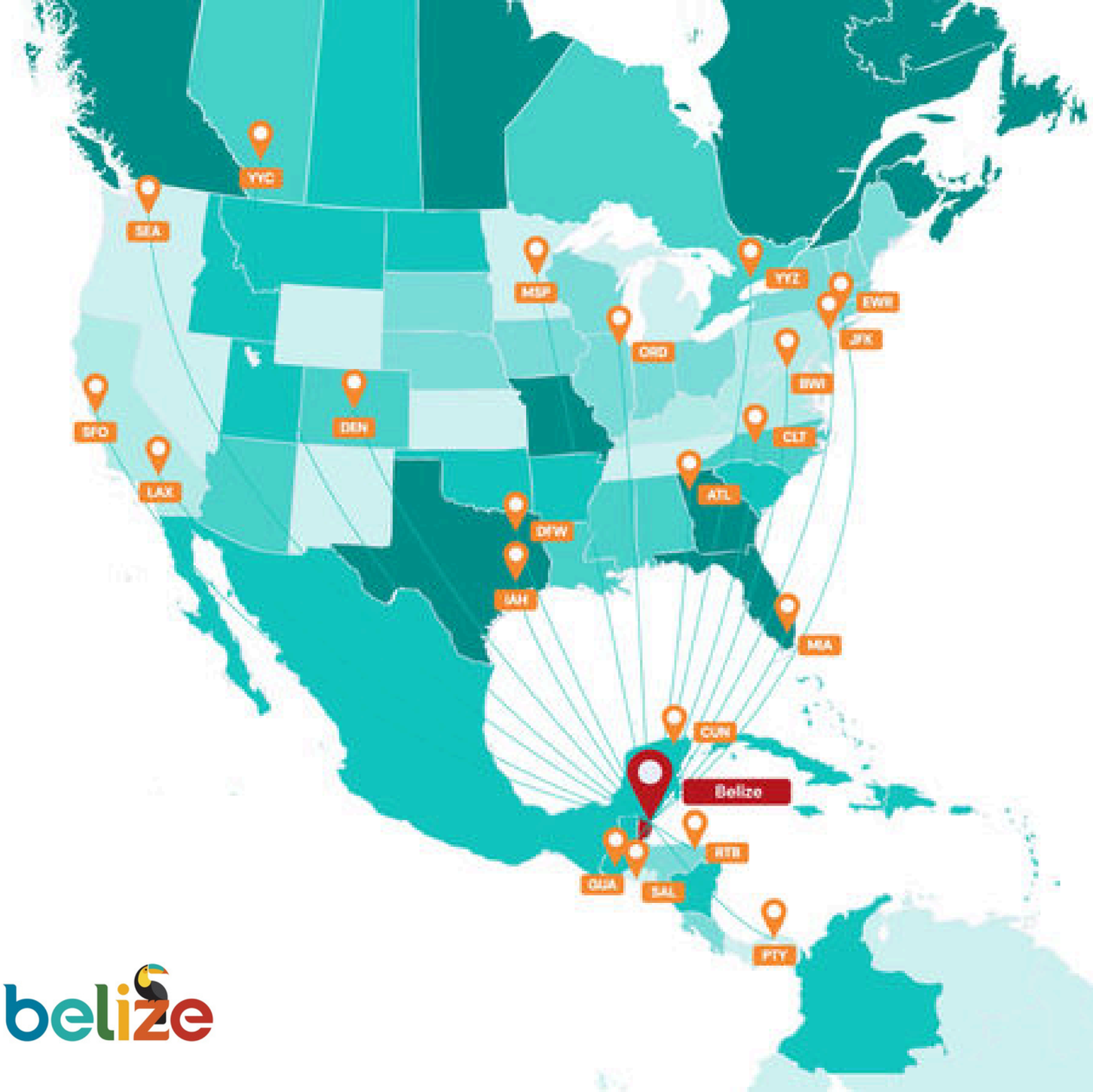

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COMING SOON!

Fort Lauderdale	Montreal	San Francisco
SPIRIT AIRLINES NOVEMBER 21, 2025	AIR CANADA DECEMBER 8, 2025	UNITED AIRLINES DECEMBER 20, 2025

Direct Flights Listing:

Air Canada
- Toronto: 4h 15m
- Montreal: 4h 30m

(same-day European connections)

Alaska Airlines
- Los Angeles: 5h
- Seattle: 7h

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JetBlue
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Spirit Airlines
- Fort Lauderdale: 1h 25m

Sun Country:
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Southwest
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Home
Is Just One Flight Away

belize

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Overnight Tourist Arrivals 2019 -2024P

	2019	2020	2021	2022	2023	2024P
January	50,590	48,554	6,908	25,667	42,412	57,628
February	49,868	50,817	7,938	30,241	48,476	59,067
March	57,697	23,962	15,444	41,909	52,431	69,202
April	46,694	689	14,609	39,228	42,833	47,825
May	36,779	543	20,814	33,006	32,871	45,332
June	42,938	212	26,362	34,080	38,819	47,002
July	45,196	621	27,742	37,138	43,059	44,275
August	33,764	705	16,782	31,099	33,358	33,760
September	19,645	772	11,685	17,783	19,768	23,262
October	25,341	3,179	13,574	18,946	19,132	27,616
November	38,981	4,856	22,848	25,620	35,804	43,039
December	55,674	9,213	34,286	37,897	55,760	60,397
	503,166	144,124	218,991	372,614	464,723	562,405

How Tourism Impacts a Vacation Rental Market (like Belize)

Tourism directly drives occupancy rates, average daily rates (ADR), and property investment demand. The relation/equation would be expressed as;

$$VR = \gamma + \delta_1 T + \epsilon$$

Where:

- VR = performance of the vacation rental market (measured by occupancy rate, rental yield, or price per night)
- T = tourism arrivals
- $\delta_1 > 0$ = marginal effect of increased tourists on vacation rental performance
- γ = base rental demand (domestic or long-term stays)

For example, a 10% rise in tourist arrivals could raise average occupancy by 5–7% in high-demand markets like Ambergris Caye or Placencia.

Higher tourism → higher occupancy → higher revenue → higher investor demand.

Investment Vacation Rentals

Tourism Belize

Belize's tourism sector has experienced rapid growth in the post-pandemic era, setting a record for overnight arrivals in 2024 with a staggering 21% year-over-year increase, officially ranking it as one of the fastest-growing destinations in the Caribbean.

The vacation rental sector continues to grow due to Belize’s popularity with North American travelers and increased direct international flights.

Tourism-driven rental markets, especially on Ambergris Caye and Placencia.

Belize Fastest Growing Caribbean Destination

Year-Over-Year Tourism Growth 2023 to 2024

Investment Vacation Rentals

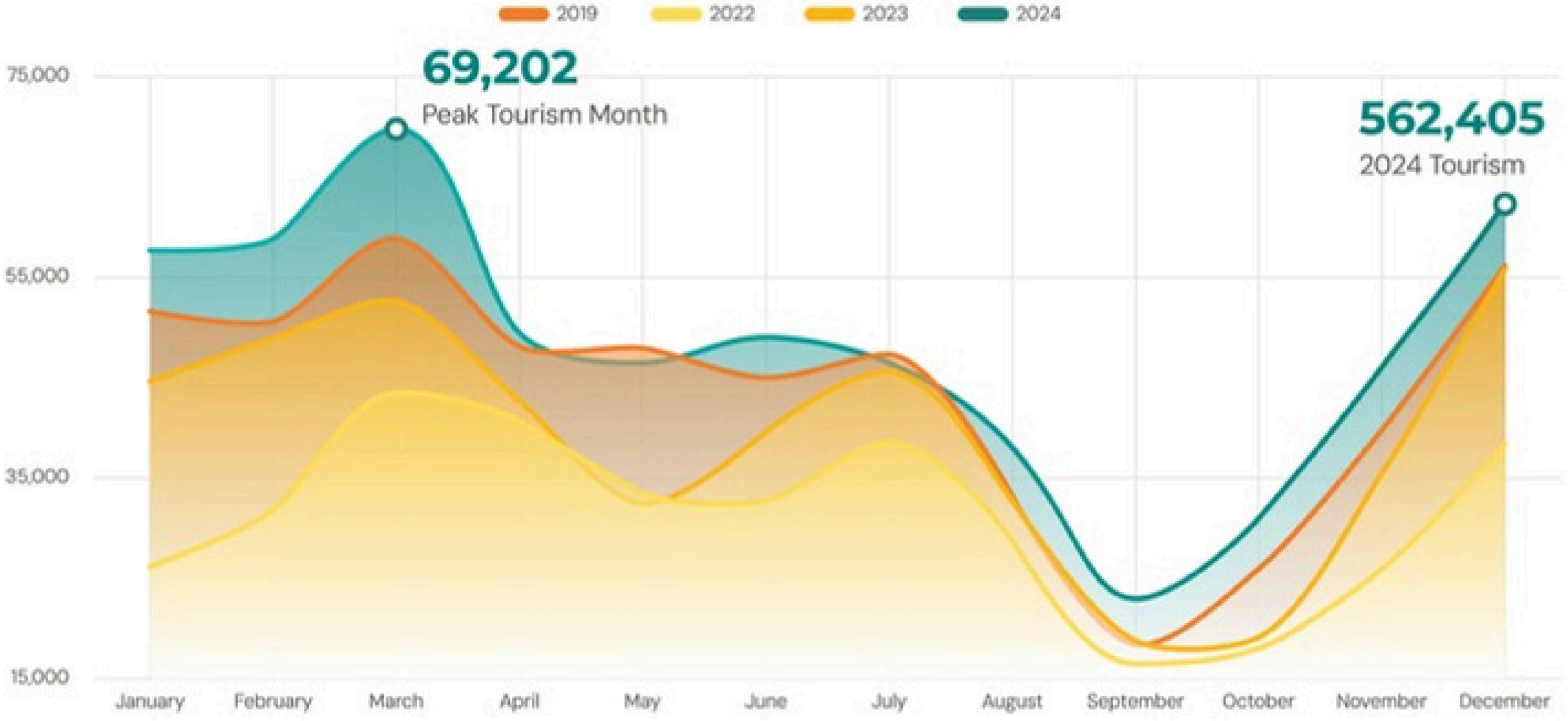
Investment Belize

Belize's sustained, record-breaking growth in tourism directly catalyzes the vacation rental investment market by driving high occupancy rates, creating strong cash flow potential for investors, and rapidly appreciating property values in key coastal and island destinations.

The relationship between the growing tourism sector and the vacation rental market is a direct economic cycle driven by demand, scarcity, and profitability.

When tourism thrives, it creates the essential market conditions that attract real estate investors.

Monthly Tourism in Belize



Investment Belize

Growing Tourism = Higher ROI

Higher Demand = Higher Occupancy

- A surge in overnight visitor arrivals—the key metric for tourism growth—creates proportional demand for short-term accommodations (vacation rentals, condos, villas) as tourists seek alternatives to traditional hotels. This translates directly to high occupancy rates for rentals.

Pricing Power = Higher Yields

- High occupancy, especially in prime locations (like Ambergris Caye or Placencia), gives property owners the leverage to charge premium nightly rates (Average Daily Rate or ADR). This increased revenue maximizes the property's rental yield (Return on Investment or ROI), which is the primary driver for cash-flow-focused investors.

Direct Flights Belize Investment

Flights → Tourism → Occupancy and Demand

More Direct Flights lead to More Tourists, which creates High Demand for Accommodation, ultimately resulting in a Booming, Profitable, and Appreciating Vacation Rental Market.

Example:

10 new flights = +15% tourism = +9% vacation rental occupancy

- Belize sees a ~15% increase in visitors for every 10 new direct weekly flights.
- Vacation rental occupancy increases roughly 6% for every 10% increase in visitors.

$$10 \text{ new flights} \rightarrow +15\% \text{ tourism} \rightarrow +9\% \text{ vacation rental occupancy}$$

So, adding new direct connections (e.g., from major U.S. hubs) can significantly lift both short-term rental yields and long-term property values.

Combined Impact of Flights and Tourism

When you combine both relationships, flights to tourism and tourism to investment, you can begin to see the link.

Increasing direct flights (F) indirectly boosts the vacation rental market (VR) through higher tourism arrivals (T).

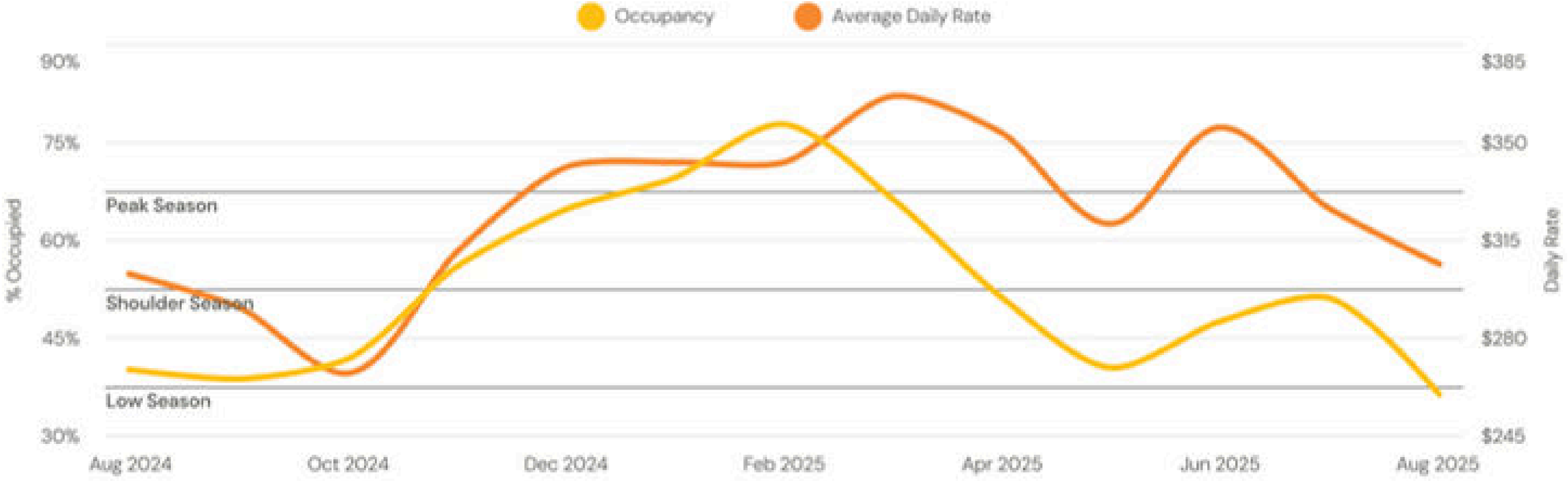
$$VR = \gamma + \delta_1(\alpha + \beta_1 F) + \epsilon$$

Simplified:

$$VR = (\gamma + \delta_1\alpha) + (\delta_1\beta_1)F + \epsilon$$

The influx of tourists driven by improved connectivity creates a high-demand environment that directly fuels the growth and profitability of the vacation rental market, particularly in popular spots like Ambergris Caye or Placencia

Aspect	Impact on Vacation Rental Market	Details in Belize's Context
Increased Demand & Occupancy	A higher volume of overnight tourists directly translates into a greater need for accommodation.	Belize's overnight visitor arrivals have surpassed pre-pandemic levels, leading to high occupancy rates (e.g., over 70% in peak season for top properties in Ambergris Caye).
Higher Rental Income	The strong demand allows property owners to increase their **Average Daily Rates (ADR)**, leading to higher annual revenue.	Reports show significant year-over-year growth in ADR and annual rental revenue in prime Belizean markets.
Shift in Traveler Preference	Tourists increasingly prefer the space, privacy, and amenities of vacation rentals (e.g., private villas, condos) over traditional hotels.	The short-term rental sector, including platforms like Airbnb, is booming, capturing a large share of the tourism growth.
Real Estate Investment Boom	The potential for high rental yields attracts both local and foreign investors to purchase properties specifically for use as short-term rentals.	Foreign investment in Belizean real estate, particularly in coastal areas, is strong, with many buyers targeting properties to capitalize on the lucrative rental market. This drives property value appreciation.
Market Expansion	High success in established areas can push demand and investment into emerging tourist districts.	While Ambergris Caye is the hotspot, investor interest is expanding into areas like the Cayo District or Corozal.
Slightly Increased Competition	As the market grows and more investors enter, competition among vacation rental owners increases, pushing owners to focus on superior amenities, service, and strategic pricing.	The market shows significant variation in revenue between entry-level and top-performing properties, indicating the importance of quality and management.



Low Season

Revenue averages
$3,320 per month USD

Occupancy rates average
37.6%

Daily rates average
$369 per night USD

Peak Season

Revenue averages
$6,596 per month USD

Occupancy rates average
71.8%

Daily rates average
$374 per night USD

Shoulder Season

Revenue averages
$4,900 per month USD

Occupancy rates average
53.3%

Daily rates average
$381 per night USD

Ambergris Caye Average Rental Unit

Annual Revenue

$54.9K

Occupancy Rate

55%

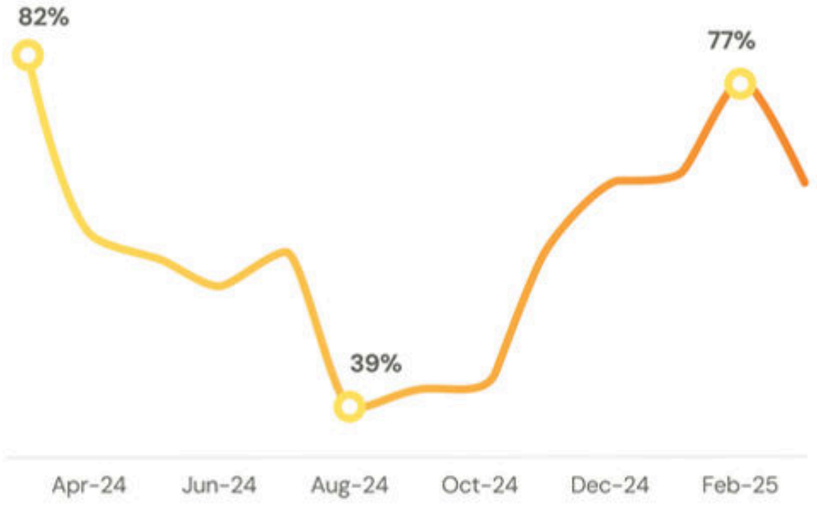
Average Daily Rate

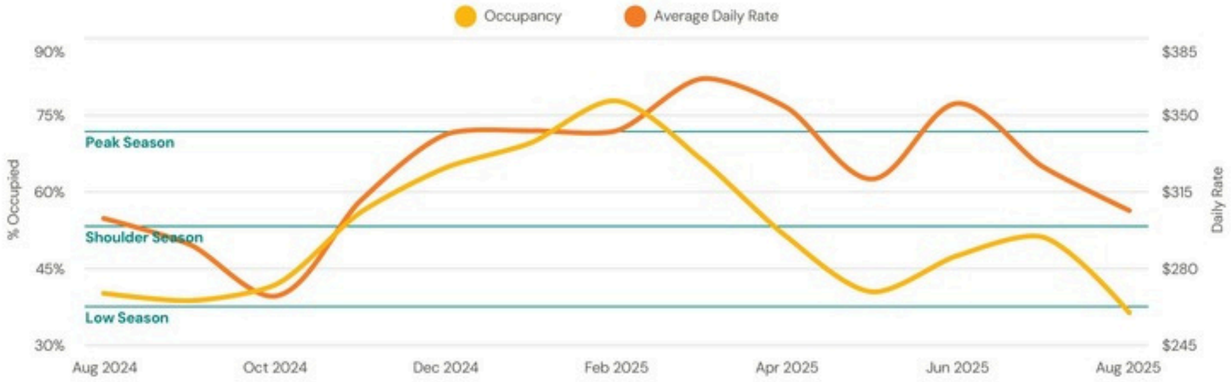
$332.77

RevPAR

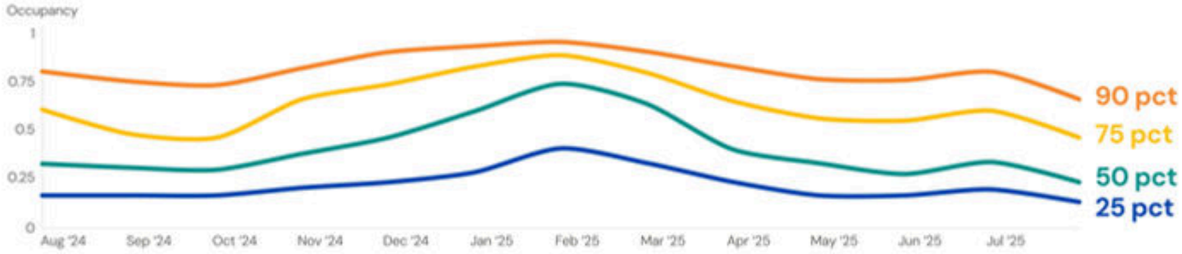
$181.41

Ambergris Caye Average Occupancy





Occupancy Rate in San Pedro (2025)



In San Pedro, there are seasonal factors. The seasonal demand shift significantly influences bookings, occupancy, and the nightly rate a property can charge.

Typically, February and March see the highest demand (peak season occupancy), while August experiences the lowest (low season). Top-performing vacation rental properties have strategies for slow-season stability. This includes adjusting minimum stays or offering promotions, which can boost occupancy during slower periods.

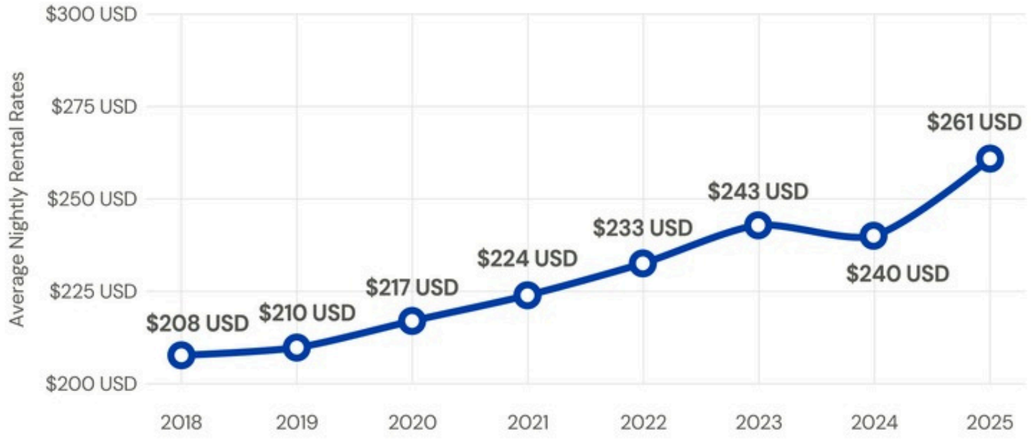
Property tier performance on Occupancy in San Pedro:

- **The Best (Top 10%) Properties** achieve an annual average of over 73%+ occupancy for the year.
- **Strong performing properties (Top 25%)** maintain an average annual occupancy of around 51% or higher occupancy.
- **Typical properties (Median or Average)** have an occupancy rate of around 32%.
- **Entry-level properties (Bottom 25%)** maintain an average 17% occupancy.

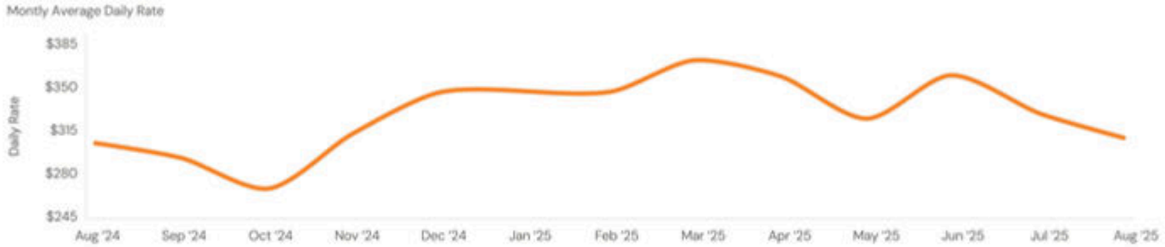
Year-to-Date of 2025 (January to July), the average Short-Term Rental property (Airbnb) in San Pedro has an average of 55% occupancy.

Ambergris Caye Average Rental Rates

Average Rental Rates Year-Over-Year



Average Daily Rate in San Pedro (2025)



An effective short-term rental pricing strategy in San Pedro involves understanding monthly and seasonal ADR fluctuations. The Average Daily Rate (ADR) for Airbnb in San Pedro typically peaks in March and dips lowest during September (this follows the seasonality trends of tourism).

Property tier performance on ADR in San Pedro:

- **The Best (Top 10%) Properties** have nightly rental rates of $792+ per night USD, often due to premium features or locations.
- **Strong performing properties (Top 25%)** achieve nightly rates of $529 per night USD or more.
- **Typical properties (Median or Average),** the median ADR properties charge around $276 per night USD.
- **Entry-level properties (Bottom 25%)** earn around $137 per night USD.

Year-to-Date of 2025 (January to July), the average ADR or nightly rental rate per unit on Ambergris Caye (San Pedro) for 2025 has been roughly $333 per night USD.

Investment Belize

Growing Tourism = Higher ROI

Increased visitor traffic → Higher short-term rental occupancy.

Seasonal and year-round tourism → Consistent cash flow.

Limited new construction → Property value appreciation.

Diversified tourist base → Stable long-term demand.

As Belize attracts more international visitors, the country's short-term rental market strengthens, boosting rental yields and property appreciation simultaneously.

United Airlines: Substantial Seasonal Expansion

United Airlines is dramatically increasing its service during the peak holiday period, with plans for up to six daily flights on the busiest days. The specific seat increase depends on the mix of aircraft used.

- Aircraft and Capacity: United typically services Belize with Boeing 737-800 (approximately 166 seats) and Boeing 737-900 (approximately 179 seats) aircraft.
- Projected Daily Increase: Operating six daily flights with this aircraft mix would result in an estimated 1,000 to 1,075 available seats per day during the peak travel dates at the end of 2025. This represents a substantial increase over their regular, non-peak schedule.

Spirit Airlines: Introducing a New Daily Service

Spirit Airlines is a new entrant to the Belize market, launching a daily non-stop flight from Fort Lauderdale (FLL) starting in November 2025.

- Aircraft and Capacity: Spirit will utilize its Airbus A320 family aircraft. The seat count can vary depending on the specific model used, with the A320neo having 182 seats and the A321neo having 228 seats.
- Projected Daily Increase: This new daily service will add an estimated 182 to 228 seats each day to the Belize market, providing a significant new low-cost option for travelers.

Air Canada: A New Route Adding Over 130 Seats

Air Canada's expansion comes from the introduction of a brand-new, non-stop weekly route from Montreal (YUL).

- Aircraft and Capacity: This route will be serviced by an Airbus A220-300 aircraft.
- Projected Weekly Increase: The Airbus A220-300 is configured with 137 seats (12 in Business Class and 125 in Economy). As this is a new route, this represents a direct weekly increase of 137 seats from the Montreal market.

WestJet: A 45% Increase in Seat Capacity

WestJet has been the most specific about its capacity expansion, officially announcing a 45% increase in seat capacity for its seasonal service from Toronto (YYZ) and Calgary (YYC).

- Baseline (2024/2025 Season): WestJet operated three weekly flights to Belize using their Boeing 737 aircraft (typically configured with 174-189 seats).
- Projected Increase: A 45% increase on this baseline translates to a significant boost in the number of available seats for the 2025/2026 season, solidifying their role in the Canadian market.

U.S. carriers (e.g., **United Airlines**) are reportedly planning to resume or add more direct flights (e.g., from Denver, Chicago, Newark) in the 2025 high season.

The addition of **Spirit's Fort Lauderdale direct route** and **Air Canada's Montreal route** represent 2 new direct city-pairs (or markets).

The Air Canada route through Montreal will open up the European market as well, with a same-day transfer from Europe to Belize. It potentially allows for a same-day connection to Belize without requiring transit visas for the United States.

WestJet's expansion in frequency from Canada is projected to increase seat capacity on existing direct routes. For example, WestJet announced that its expanded schedule will increase capacity "by an impressive 45 % over last season" for its Canada → Belize service.

Because Belize is diversifying its source markets (more from Canada, possibly Latin America) and actively courting new routes, the baseline number of direct nonstop routes is likely to grow by **somewhere between 10 % and 25 %** (in terms of number of city-pairs or service frequencies) in 2025, compared to 2024.

Over the last few months, there have been increases in connectivity from other airline providers: TagAirlines (+25%), Southwest (+15%) , and Delta (+14%).

Leading the expansion is United Airlines, which has announced a substantial increase in its offerings for the 2025 high season.

The carrier is set to resume and enhance its direct flight services from several key U.S. hubs. Beginning in November 2025, travelers can expect renewed direct flights from;

- Denver (DEN),
- Chicago (ORD),
- and Newark (EWR).

Furthermore, a direct route from San Francisco (SFO) is slated to recommence in December 2025.

During the peak holiday period, United plans to operate up to six daily flights on the busiest travel days, underscoring strong demand.

United Airlines, already one of the largest international carriers serving Belize, is significantly expanding its flights for the 2025/2026 high season. This expansion focuses on increasing capacity during the peak holiday travel period and reinstating key seasonal routes.

As one of Belize's largest international carriers, United's commitment to operating up to six daily flights during the peak holiday period guarantees the necessary seat capacity to meet the expected surge in demand, preventing potential price spikes or lack of availability.

The expansion of United's service reinforces Belize's position in the high-end and traditional U.S. tourism market, focusing on convenience and reliable capacity.

United's network, which serves many business and luxury travelers, ensures easy access from major hubs like Newark and Chicago.

Route	Status	Start Date (2025)	Notes
Houston (IAH)	**Continual Daily Service**	Year-round	This is the long-standing, year-round anchor route.
Denver (DEN)	Seasonal Service Returns	**November 1, 2025**	Connects Belize to the Mountain West.
Chicago (ORD)	Seasonal Service Returns	**November 1, 2025**	Connects Belize to the Midwest.
Newark/NY (EWR)	Seasonal Service Returns	**November 1, 2025**	Connects Belize to the Northeast/New York area.
San Francisco (SFO)	Seasonal Service Returns	**December 20, 2025**	Connects Belize to the West Coast.

Low-cost carrier Spirit Airlines is also entering the Belizean market with a new nonstop service from Fort Lauderdale (FLL), scheduled to begin in November 2025. This addition is expected to provide a more budget-friendly option for travelers from the southeastern United States

The largest contributor to the sustained increase is the new daily non-stop service from Fort Lauderdale (FLL). Utilizing their Airbus A320neo aircraft (182 seats), this route alone adds approximately 1,274 new seats to the Belize market every week.

Detail	Information
Start Date	**November 21, 2025**
Frequency	3 times per week (**Mondays, Fridays, and Saturdays**).
Duration	The flight is a short, approximately 2.5-hour non-stop service.
Introductory Fare	Starting as low as **USD $85 one-way** (excluding baggage/fees).
Route Significance	It is the **only non-stop route** between Fort Lauderdale and Belize.

Canadian travelers will also see a significant boost in flight availability. WestJet is expanding its seasonal service from Toronto (YYZ) and Calgary (YYC) with an impressive 45% increase in seat capacity. This enhancement will provide more frequent and flexible travel options for those heading to Belize from Canada.

The Canadian carrier has announced a 45% increase in seat capacity on its seasonal routes from Toronto (YYZ) and Calgary (YYC). Based on their previous schedule of three weekly flights using Boeing 737 aircraft, this translates to roughly 243 additional seats per week.

Route	Change	2025/2026 Schedule Highlights
Toronto (YYZ) → BZE	**Increased Frequency**	**Peak Season:** Up to **4x weekly** (Mon, Tue, Thu, Sat).
	Increased Length	Service starts earlier (Oct 30, 2025) and runs longer, through **May 10, 2026**.
Calgary (YYC) → BZE	**Increased Frequency**	**Peak Season:** Up to **3x weekly** (Mon, Thu, Sat).
	Increased Length	Service starts earlier (Oct 30, 2025) and runs longer, through **May 10, 2026**.
Overall Capacity	**Major Increase**	Total seat capacity is projected to increase by an impressive **45%** over the previous season.

AIR CANADA

Adding to the Canadian contingent, Air Canada is launching a brand-new direct route from Montreal (YUL) to Belize City, further broadening the accessibility for eastern Canadian tourists.

The new Air Canada non-stop flight from Montreal (YUL) to Belize City (BZE) is a major development for Belize's tourism sector.

It provides a direct, non-stop route from Eastern Canada, supplementing the existing seasonal flights from Toronto and Calgary. This makes travel from major cities in Quebec and the surrounding areas significantly easier.

The primary significance of this route extends beyond the Canadian market to the European connection it provides. For the first time, travelers from over 20 major European cities (including London, Paris, Amsterdam, Frankfurt, Madrid, and Rome) can fly to Belize with just one same-day connection in Montreal.

It functions as a new, streamlined northern gateway to Belize, dramatically improving accessibility.

Operated by Air Canada Rouge (Airbus A319).

Tulum vs Belize

Air Canada chief commercial officer, Mark Galardo, said during a recent earnings call that it's a case of the market finding the right equilibrium:

> ***"I think it's no secret that the industry in general put a lot of incremental capacity into Tulum; now you're seeing some carriers rationalize a bit. We ourselves in Tulum are going to pare back a little bit of our service there and really kinda double down on Cancun, which performs quite well for us."***

Air Canada

"Belize is a spectacular destination renowned for its rich history, culture and natural beauty. Air Canada's new flight to Belize from our Montreal hub is convenient for Canadians and Europeans alike to discover beautiful Belize this winter season. We look forward to welcoming customers onboard our award-winning airline,"

- Alexandre Lefevre, Vice President, Network Planning – North America at Air Canada.

Tulum vs Belize

Looking at data from Cirium that compares the 2024 and 2025 winter schedules of US airlines to Tulum, there is a sharp drop-off in the number of flights. This year will see 450 fewer flights, representing a 26% reduction in availability. In addition, while US airlines flew to Tulum from 10 different airports last year, this year that is reduced to just six.

Tulum International Airport: Flight Reductions Winter 2024 vs Winter 2025

Airline	2024 Movements	2025 Airports	2025 Movements	2025 Airports	Reduction
United Airlines	638	EWR, IAH, ORD	458	EWR, IAH	28%
American Airlines	600	CLT, DFW, MIA	414	DFW, MIA	31%
Delta Air Lines	294	ATL, DTW, MSP	238	ATL	19%
JetBlue	216	JFK	188	JFK	13%
Total	**1,748**	**10**	**1,298**	**6**	**26%**

UNITED

United Airlines Projected % Change

Tulum *-26%*	*+10%.* **Belize**
IAH	IAH (highest)
ORD (stopped)	ORD +
EWR	EWR +

A combination of a cool-off in Tulum tourism and an excess capacity of available seats has led to the US carriers pulling back from the market. Looking at airline winter schedules (high season in Tulum), this year will see a 26% drop in capacity versus last year, with American Airlines and United Airlines making the biggest cuts.