
Royal Flycatcher
Dan Lipp

Bird Tourism Market for Belize

Economic and Market Snapshot of the Bird-Based Tourism Sector

Economics of Bird Tourism in Belize

Tourism is the largest source of foreign exchange in Belize and accounts for more than one-third of the country's jobs.[1] The tourism product is largely reliant on the country's natural environment, and Belize has been proactive in protecting approximately 36% of its terrestrial and 20% of its marine environments.[2] **Ecotourism is a significant economic opportunity and could provide incentives to conserve natural habitats and species.**

Since tour operators first 'discovered' Belize in the early 1990s,[3] the number of birding tour groups coming to Belize has grown. Bird-based tourism, as a form of ecotourism, has potential to continue growing in Belize, especially within the U.S. market. A 2012 Visitor Expenditure, Motivation & Satisfaction Survey (VEMS) of the overnight market, conducted for the Belize Tourism Board and the Central Bank of Belize, found that 73% of visitors surveyed came from the United States.[4] The National Survey on Recreation and Environment found that bird viewing and photography is "the most steadily growing [recreational] activity in the United States," growing over 400%, from 21 million to 85 million between 1982 and 2009.[5]

In 2012, Belize hosted 274,382 overnight visitors,[10] of which 10.2% or nearly 28,000 reported participation in birding.[11] Within this picture, the U.S. market is strongest, representing nearly 75% of all international visitors and the largest segment of bird watchers. Since only about 10% of U.S. visitors currently engage in bird watching, **the U.S. bird market has capacity for considerable growth.**

Though no studies have been done specifically on the bird watching tourism market in Belize,[13] the economic impact can be inferred. According to a 2012 survey conducted with tour operators by Cloudbirders, the average trip duration by birders in Belize was 12 days.[14] That year, the average per capita expenditure per day of visitors was US$145.[15] **Thus, each birder spent on average $1,740 per trip, and the total expenditure of birders per year can be estimated at nearly US$47 million.**

The Destination

Belize boasts 574 species of birds, of which 264 are migratory, 109 are water birds, and 29 are sea birds.[6] Only one, the Yellow-headed Parrot (*Amazona oratrix belizensis*), is endemic.[7] On a single trip, birders see an average of 231 birds, with a maximum sighting of 302 birds.[8] The country contains six Important Bird Areas identified by BirdLife International, which cover over 3,000,000 hectares, giving Belize the highest proportion of Important Bird and Biodiversity Areas (IBAs) in the Americas.[9]



Total contribution of Travel & Tourism to GDP in 2014.

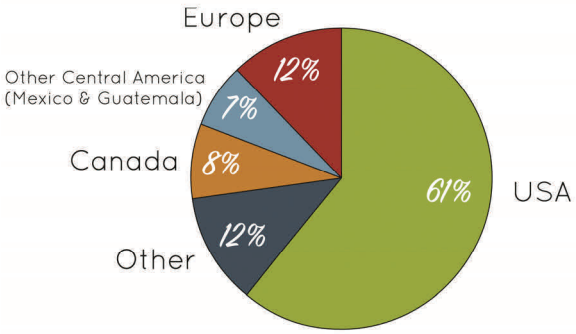


Total contribution of Travel & Tourism to employment in 2014.

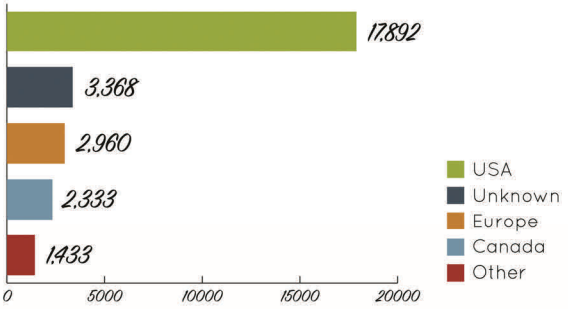


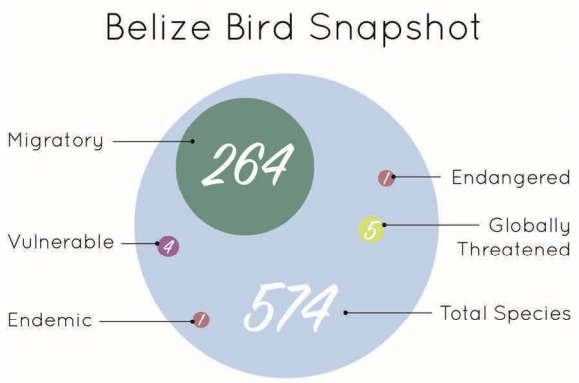
Overnight visitors who reported participation in birding

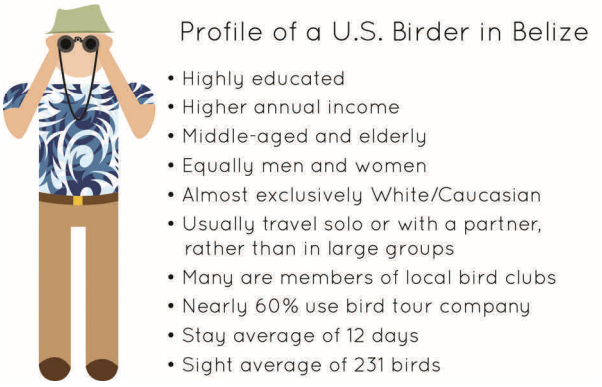
Belize Tourist Arrivals, 2012



Number of Birders by Nationality, 2012





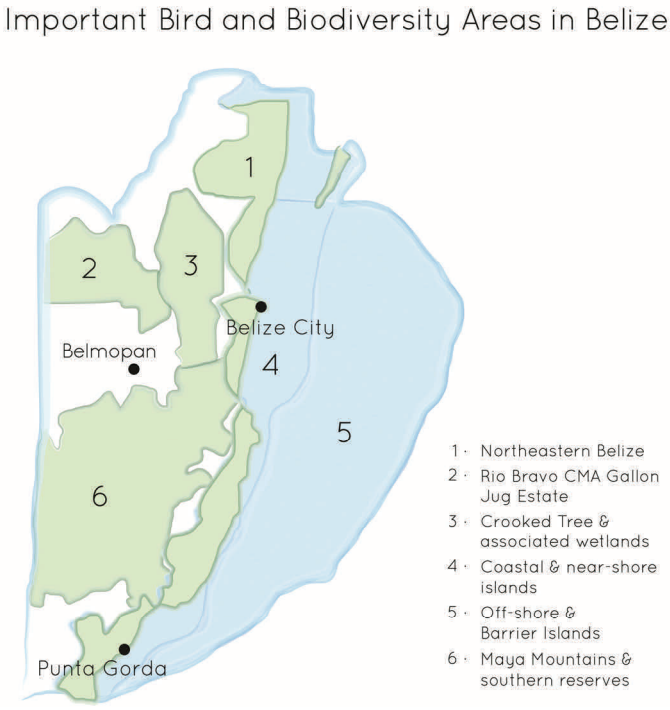


Competition

As a birding destination, Belize competes primarily with Costa Rica. Other competitors include: Mexico, the recently established Caribbean Birding Trail, and, potentially, Cuba when it is fully opened to the U.S. tourism market.[16] Because of the growing popularity of bird-based tourism, in 2000, the journal *North American Birds* expanded its coverage beyond the U.S. and Canada to include Mexico and Central America. It now provides up-to-date documentation of bird populations in Belize, one of a number of excellent print resources for active and potential birders. In addition, tour operators interviewed say birders rely on websites, social media, word of mouth, and even bird festivals when planning their trips.

The Future

Dozens of local and international tour operators offer birding within Belize, often together with other activities such as fishing, hiking, snorkeling, jungle walks, and tours of ruins.[17] Nearly 60% of birders travel in Belize with tour companies, while about 40% travel independently.[18] Belize tour operators and government official both predict bird tourism will "definitely" continue to grow. According to one tour operator, birding will "certainly" continue to expand, especially as "even more lodges start catering to this type of visitor."[19]



Endnotes

[1] World Travel & Tourism Council (WTTC) 2014. "Travel & Tourism Economic Impact 2014 Belize." http://www.wttc.org/-/media/files/reports/economic%20impact%20research/country%20reports/belize2014.pdf

[2] BirdLife International (2009). "Important Bird Areas Americas: Belize." http://www.birdlife.org/datazone/userfiles/file/IBAs/AmCntryPDFs/Belize.pdf

[3] Coastal Zone Management Authority & Institute: Ministry of Forestry, Fisheries & Sustainable Development (2014). "State of the Belize Coastal Zone." http://www.coastalzonebelize.org/wp-content/uploads/2014/10/State-of-the-Belize-Coastal-Zone-Report-2003-20134.pdf

[4] Belize Tourism Board (2013). "Travel & Tourism Statistic Digest 2012." https://btb.travelbelize.org/media/download/1672

[5] Ken Cordell, Project Leader, Athens Research Group Station, USDA Forest Service, Athens GA. (April 2013). "Birding Trends: A Research Brief in the IRIS Series. Internet Research Information Series." http://warnell.forestry.uga.edu/nrrt/nsre/IRISRec/IRISRec30rptfs.pdf

[6] BirdLife International (2015). "Country Profile: Belize." http://www.birdlife.org/datazone/country/belize

[7] Interview with Dominique Lizama, Belize Audubon, April 21, 2015.

[8] Cloudbirders (2013). "Statistics: Belize." http://www.cloudbirders.com/tripreport/statistics/area

[9] BirdLife International (2009). "Important Bird Areas Americas: Belize." http://www.birdlife.org/datazone/userfile/file/IBAs/AmCntryPDFs/01_Preliminaries_web.pdf

[10] Statistical Institute of Belize (2013). "Metadata of Tourism Statistics Belize." http://unstats.un.org/unsd/tradeserv/workshops/Dominica%202013/Presentations/17b%20-%20Belize%20-%20Metadata%20of%20Tourism%20Statistics.pdf

[11] Belize Tourism Board (2013). "Travel & Tourism Statistic Digest 2012." https://btb.travelbelize.org/media/download/1672 (This does not include birding done on day trips by cruise passengers, for which statistics do not exist.)

[12] Calculations based on 2012 statistics in "Belize BTB's Tourism Digest Table" in Metadata Tourism Statistics Belize and "Table 4.19: Participation in Activities by Country/Region of Origin (%), 2012," both from the Statistics Institute of Belize.

[13] Correspondence with Michael Arana, Tourism Data Analyst, Belize Tourism Board, April 14, 2015.

[14] Cloudbirders (2013). "Statistics: Belize." http://www.cloudbirders.com/tripreport/statistics/area

[15] Belize Tourism Board (2013). "Travel & Tourism Digest 2012." https://btb.travelbelize.org/media/download/1672

[16] Coastal Zone Management Authority & Institute: Ministry of Forestry, Fisheries & Sustainable Development (2014). "State of the Belize Coastal Zone." http://www.coastalzonebelize.org/wp-content/uploads/2014/10/State-of-the-Belize-Coastal-Zone-Report-2003-20134.pdf

[17] Belize Tourism Board (2015). www.travelbelize.org. The BTB provided a list of 39 Belize-based tour operators offering bird tours; there are, as well, a number of international companies selling birding tours to Belize.

[18] Cloudbirders (2013). "Statistics: Belize." http://www.cloudbirders.com/tripreport/statistics/area

[19] Interview with Roni Martinez, Black Orchid Lodge, May 2, 2015.

BID

FOMIN
Multilateral Investment Fund
Member of the IDB Group

Audubon

CREST