



— 2026 TOURISM STRATEGY REPORT

The world is changing how it travels. Is Roatán ready?

A three-part brief: the global forces reshaping travel in 2026 and why they matter — how Roatán can build its future on them — and the strategic moves for the island's trade, businesses and operators.

● ROATÁN TOURISM BUREAU · POWERED BY THE PRÓSPERA ECOSYSTEM

STRATEGY REPORT · JUNE 2026 · PREPARED FOR THE ISLAND'S TRADE, INVESTORS & PARTNERS

Part One

The Global Trends

What's reshaping travel — and the numbers behind it

Part Two

Roatán's Future

Turning each trend into the island's advantage

Part Three

The Playbook

Strategic advice for the trade & operators

— ◆ FOREWORD

Why being underrated is the opportunity.

When people describe Roatán, the word that comes up most is 'underrated.' I have come to see that not as a problem, but as the opportunity of a generation.

The island has spent years watching the biggest shifts in global travel — wellness and longevity, the rise of the location-independent worker, the move from cheap volume to real value — pass it by. Read one way, that is a story of missing out. Read correctly, it is the rarest thing a destination can own: a clean slate. Roatán carries none of the legacy that traps the mature Caribbean. It can skip the model everyone else is now trying to escape and build, deliberately, for where travel is actually going.

That is the wager this plan makes. **Not to catch up, but to leapfrog** — to turn a sleepy dive island into the place that sets the trend others follow. Two frontiers matter most to me, because they are where Roatán can lead rather than follow: **longevity**, paired with one of the planet's great reefs, and the **diving remote worker** who comes for a week and finds reasons to stay for a season.

None of this happens by accident — and none of it happens through fees or friction. It happens by making the right thing — protecting the reef, building experiences worth the journey, removing every

obstacle to spending and staying — the most profitable thing to do on this island. That is the bureau's job, and it is the work that follows.

The window is open. Let's step through it.

— [Name]

[Title] · Roatán Tourism Bureau

— 00 EXECUTIVE SUMMARY

An inflection point — and an unusually aligned one.

Roatán enters 2026 with something most destinations never get: a moment when the forces reshaping global travel align almost perfectly with the assets the island already owns.

Wellness and longevity, regenerative and experiential travel, the shift from volume to value, distributed work, AI-mediated discovery — read together, these forces do not threaten Roatán. They describe what it could become. The only real question is whether the island claims that position deliberately, or watches a better-prepared competitor claim it first.

Today Roatán runs on two economies with opposite economics. **Cruise tourism** delivers the headlines — sixty-three percent of all Honduran arrivals — but each passenger spends only a few hours ashore and roughly a hundred dollars, and the cruise lines are working to keep even that onboard, pouring billions into private islands engineered as self-contained destinations. **Stay-over tourism** is quieter and far more valuable: a guest who sleeps on the island spends five to ten times what a day-tripper does, drawn by the diving and a reef few rivals can match, and returns year after year. Yet that high-value visitor meets an experience hampered by self-inflicted friction: a cash-dependent economy with punitive card fees, patchy connectivity, and a port experience that undercuts the brand. The whole of it rests on a reef whose continued decline would erase the island's central asset.

The response is not a marketing refresh. It is a deliberate repositioning: stop competing on volume and price, and compete instead on a reef worth protecting, an experience worth paying for, and an island that simply works.

Concretely, Roatán should commit to becoming **the Caribbean's regenerative dive-and-wellness island** — a place a visitor helps protect, that helps them restore, and that is effortless to reach, pay for and stay in — through three commitments that reinforce one another. **Protect the asset:** make reef restoration a thriving part of the island's economy — funded by the experiences visitors choose, not a fee they are charged — because a healthy reef is the product everything else sells. **Premiumize the experience:** turn a dive trip into a longer, higher-value reason to stay and return, built on the fastest-growing demand in travel — wellness, longevity, milestone and celebration travel, and the women, multigenerational families and silver divers now driving the market. **Remove the friction:** make the island as seamless to transact in and inhabit as the modern traveler assumes, and as discoverable to the AI assistants increasingly deciding where people go.

Executed with discipline, this lifts yield, lengthens stays and deepens loyalty **without adding a single arrival** — and it does so by leaning into trends that are, for now, tailwinds. That timing is the heart of the argument. The reef does not pause; the cruise lines do not stop building; and the position of the Caribbean's regenerative dive-and-wellness island will be occupied by someone within this decade. What follows is the evidence behind each force, the strategy that turns it into Roatán's advantage, and the specific moves for every part of the island's trade.

About this report. A synthesis of more than forty industry sources published in 2025–2026 — among them UN Tourism, the WTTC, CLIA, the Global Wellness Institute, Skift, Booking.com, American Express and Virtuoso — read against current Honduran tourism statistics, Roatán's operating context and traveler voice-of-customer analysis (see Sources & notes). Figures are directional, intended to inform strategy rather than forecast outcomes.

— ◆ THE CENTRAL ARGUMENT

The latecomer's advantage.

There is a version of this report that reads as a list of trends Roatán has missed. That reading is wrong — and getting it right is the most important thing in these pages. Roatán is not behind. It is unencumbered.

The island has no sprawling legacy of mass-market resorts to unwind, no entrenched high-volume model defending itself, no decades of brand debt pulling it toward the mean. Many of the Caribbean destinations that look 'ahead' are, in truth, trapped — locked into cruise dependency and price competition they can no longer escape. Roatán carries none of that weight.

That is the latecomer's advantage. A destination building from close to a blank page can adopt what the mature market is now struggling to retrofit: **cashless, AI-native payments; conservation designed in rather than bolted on; and a deliberate bet on the two segments most rivals only discuss — longevity and the location-independent worker.** Coming late is not a handicap to apologize for; it is optionality the incumbents have already spent.

So the work is not recovery. It is to build, on purpose, the destination Roatán could be a decade from now — while its rivals are still repairing the one they already are. The inputs are here: the reef, the divers, the loyalty, and an infrastructure platform that arrived at the right moment. What is missing is only the decision to use them.

The forces reshaping global travel in 2026.

2026 is less a year of new trends than the hardening of a single one: the traveler's shift from accumulation to meaning. Across every major industry report — UN Tourism, the WTTC, CLIA, Skift, Booking.com, American Express, Virtuoso, the Global Wellness Institute — the same signal recurs in different vocabularies. The eleven forces below are facets of that shift; read together, they describe the visitor Roatán must win.

1.52^B

INTL. ARRIVALS 2025 · +4%
\$12T TRAVEL ECONOMY

TREND 01 · THE MACRO PICTURE

Value over volume

Travel has fully recovered, and the 2026 traveler spends more per trip than ever — in most destinations receipts now grow **faster than arrivals**. The winning play is no longer chasing headcount; it's capturing higher-value visitors who stay longer and spend deeper.

● IN PRACTICE

Travelers take fewer but richer trips — splurging on one standout experience, extending the stay, choosing quality over quantity.

● WHO'S THRIVING

High-value, lower-volume models: **Bhutan's** high-value model, **Saudi Arabia's** Vision 2030 (AIUla, the Red Sea), and a record-breaking, weak-yen **Japan**.

ROATÁN'S READ

Roatán has optimized the wrong number for years — counting cruise heads while the value pooled offshore. The shift to yield isn't a threat to manage; it's permission to stop apologizing for being small and start charging for being rare.

UN Tourism · WTTC · 2026

TREND 02 · WELLNESS & LONGEVITY

Rest is now the reason to travel

Wellness, recovery, sleep and longevity have moved from holiday perk to the **whole point of the trip**. Travelers now book to optimize their health — biological-age tests, sleep science, hormone and metabolic programs — with North America the largest wellness market. Sleep tourism alone is a \$70–96B niche.

● IN PRACTICE

Guests book 'sleepcations' and multi-day longevity programs — biomarker testing, NAD+ and recovery therapy — or simpler nature-and-restoration resets.

● WHO'S THRIVING

SHA Wellness (Spain & new Mexico), **Six Senses** (Rosebar, Ibiza), **Kamalaya** (Thailand), **Canyon Ranch**, and Blue-Zone **Costa Rica** (Nicoya).

ROATÁN'S READ

This is the headline bet. Almost any destination can offer a spa; almost none can pair warm-water reef diving with a credible, science-backed longevity offer. With the island's emerging biotech-and-longevity framework, Roatán can build what the Caribbean simply doesn't have — diagnostics, recovery and health-span programming beside one of the planet's great reefs. Longevity isn't a side category here; it's a position no rival can easily copy.

55%

PRIORITIZE AUTHENTIC
OVER SIGHTSEEING

TREND 03 · EXPERIENTIAL & TRANSFORMATIONAL

People buy transformation, not tours

Travelers increasingly buy **immersion, skills, culture and story** over checklists. Food is central, and 'set-jetting' — traveling to film and TV locations — has become an ~\$8B force. 76% say the skills they gain outlast any souvenir.

● IN PRACTICE

People plan whole trips around a dish, a cooking class or a festival — and around a series: 81% of Gen Z/Millennials travel for places they've seen on screen.

● WHO'S THRIVING

Set-jetting hotspots — **Sicily** and **Thailand** (Four Seasons Koh Samui) via The White Lotus, the French Riviera next — and culinary capitals like **Oaxaca** and **San Sebastián**.

ROATÁN'S READ

Roatán already sells the most transformational product in travel and undercharges for it: a visitor arrives unable to breathe underwater and leaves a certified diver. The move is to frame that for what it is — a life skill, not an excursion — and finally wrap it in the culture and cuisine the island has never properly marketed.

Skift · American Express · Expedia · 2026

85%

SAY SUSTAINABILITY
MATTERS TO THEIR TRIP

TREND 04 · SUSTAINABLE & REGENERATIVE

Values shape the choice — at a small premium

'Regenerative' — leaving a place **better** than you found it — is the new framing beyond sustainability, and travelers want their money reaching local communities. But the willingness-to-pay premium is modest (~5–10%), so how conservation is funded matters as much as whether travelers care.

● IN PRACTICE

Travelers choose certified stays, join conservation and give-back activities, and favor operators that visibly protect the place.

● WHO'S THRIVING

Palau (its visitor Pledge), carbon-negative **Bhutan**, **Costa Rica's** eco model, and **Slovenia's** national Green Scheme.

ROATÁN'S READ

For Roatán this isn't a values exercise; it's asset management. The reef is the balance sheet, and 'regenerative' is just the language the market now uses for protecting it. But the answer isn't another fee — fees are easy to levy, quick to resent, and they rarely reach the water. The better path is a market: make restoration a product visitors choose to buy into, and let the bureau help operators build it.

Booking.com · Skift · 2026

5–12%

ANNUAL DIVE-TOURISM
GROWTH · NOCTOURISM +25%

TREND 05 · ADVENTURE, NATURE & MARINE

Active, wild and conservation-minded

Nature-based and marine travel is booming, with a strong tilt toward **conservation-minded operators** — and a fast-rising after-dark category, 'noctourism' (night dives, bioluminescence, stargazing). The 2024–26 solar maximum is fueling an aurora rush.

● IN PRACTICE

Travelers chase the northern lights, dive walls and wrecks, snorkel bioluminescent bays, and book dark-sky stargazing experiences.

● WHO'S THRIVING

Iceland and **Finnish Lapland** (aurora), Chile's **Atacama** (stargazing), and dive icons **Bonaire**, **Raja Ampat** and the **Galápagos**.

ROATÁN'S READ

This is home turf — the one trend Roatán isn't late to. The opening is to extend ownership of the daytime reef into the after-dark hours the rest of the market is only beginning to chase, and to claim night diving and bioluminescence before the category has a Caribbean capital.

Fortune Business Insights · Wayfairer · 2026

37.2M

RECORD CRUISE PAX 2025
42M PROJECTED BY 2028

TREND 06 · CRUISE AT RECORD SCALE

More passengers — and more captured spend

Cruising hit an all-time high with ~90% repeat intent — but the lines are capturing more of each guest's spend **onboard and on billion-dollar private islands**, where the ship itself is the destination. Onboard spend is now 30–35% of cruise-line revenue.

● IN PRACTICE

Guests increasingly sail mega-ships for the vessel and the private beach club — spending more inside the cruise ecosystem and less ashore.

● WHO'S THRIVING

Royal Caribbean (Icon of the Seas, Perfect Day at CocoCay) and **Carnival** (the new \$600M Celebration Key).

ROATÁN'S READ

Cruise is the trend to handle most carefully, because its growth can be a tailwind or a trap. As the lines pull spending onto private islands, volume without a conversion strategy becomes a treadmill. The read: treat every port day as a paid trailer for a stay-over return — and never let cruise set the island's ceiling.

CLIA · 2026

TREND 07 · WORK & TRAVEL

Distributed work is permanent mobility

Remote work has created a durable class of **long-stay travelers** who pick destinations on connectivity, community and cost of living — not just scenery. Some 53–69 countries now court them with nomad visas.

● IN PRACTICE

Nomads settle for months in co-living villas and co-working hubs, blending work with surf, wellness or diving — 'work-and-dive,' 'surf-and-work.'

● WHO'S THRIVING

Madeira's Digital Nomad Village (the original), **Lisbon**, **Bali** (Canggu/Ubud), **Chiang Mai**, and **Mexico** (Mexico City, Playa del Carmen).

ROATÁN'S READ

This is the second headline bet — and where being late helps most. Unburdened by legacy systems, Roatán can build a nomad base that is cashless, connected and frictionless from day one: work-and-dive, not merely work-from-anywhere. With strong connectivity and the region's best coworking already here, the island can be to the diving nomad what Madeira became to the remote worker — and arrive on purpose, not by accident.

82%

OF TRAVEL DECISIONS
MADE BY WOMEN

TREND 08 · DEMOGRAPHIC SHIFTS

Who travels — and how — is changing

Women drive most travel decisions, and three cohorts are reshaping demand: **solo female** travelers (search up ~5×), **multigenerational** and 'skip-gen' families, and a **Gen Z** that out-travels every other generation. Each wants different products.

● IN PRACTICE

Women-only group trips, grandparent-grandchild 'skip-gen' holidays, and Gen Z planning sober, wellness-forward trips off TikTok.

● WHO'S THRIVING

Solo-female favorites **Japan**, **Iceland** and **Portugal**; operators like **Intrepid's Women's Expeditions**, **WHOA Travel** and friend-group specialist **Flash Pack**.

ROATÁN'S READ

Roatán's biggest marketing liability — the 'Honduras' safety label — sits squarely on its biggest growth segment, the solo female traveler. That's not a reason to retreat; it's the highest-leverage story the island can tell, because correcting a false perception with truth converts faster than any ad. The Bay Islands' real safety record is the campaign.

Skift · Virtuoso · 2026

67%

OF LUXURY ADVISORS
EXPECT HIGHER DEMAND

TREND 09 · LUXURY & PREMIUMIZATION

Value-conscious luxury, experiences first

Luxury demand is resilient but discerning — 'no longer luxury for its own sake.' Experiences beat goods, and seamless, everything-included 'ultraluxe' and expedition travel are rising. 55% of advisors expect higher per-trip spend.

● IN PRACTICE

Affluent travelers buy rare experiences over things — private expeditions, ultraluxe all-inclusive, and once-in-a-lifetime, off-peak journeys.

● WHO'S THRIVING

Aman and Four Seasons, expedition lines (Explora, Antarctica & Galápagos voyages), and Saudi Arabia's Red Sea ultraluxe.

ROATÁN'S READ

Roatán has no luxury ceiling because it has barely built a luxury floor — which, again, is the latecomer's gift. It can introduce one genuinely top-tier product without cannibalizing anything, and let it pull the whole island's perception upward. Not bigger — better.

11 → 18%

GEN-AI TRIP-PLANNING
ADOPTION, YOY

TREND 10 · TECHNOLOGY & AI

AI is the new discovery layer

Travelers increasingly plan with AI, and being **recommendable by AI** — 'GEO,' generative engine optimization — is becoming a discovery prerequisite, while cashless and mobile-first are baseline expectations. 41% now trust an AI recommendation over friends or social.

● IN PRACTICE

Travelers ask an AI assistant to plan and compare whole itineraries, then book on mobile — discovery increasingly starts in a chatbot or on TikTok, not a search bar.

● WHO'S THRIVING

Expedia (its Romie assistant), **Booking.com** and **Kayak** — early ChatGPT-app partners — and destinations with structured, AI-readable content.

ROATÁN'S READ

Here, being late is almost an unfair advantage. With no legacy payment estate or booking stack to rip out, Roatán can be cashless and AI-native by default — the frictionless, recommendable destination mature markets are spending fortunes retrofitting toward. The aim should be the most AI-discoverable island in the Caribbean, not the last.

Skift · Booking.com · Kayak · 2026

67%

SAY SPONTANEITY ALONE
JUSTIFIES A TRIP

TREND 11 · INTENTIONAL & MILESTONE TRAVEL

The 'whycation' — travel with purpose

People now travel **with purpose** — to celebrate milestones, mark transitions, reset and reconnect — choosing trips by 'why,' not just 'where.' Weddings, anniversaries and personal milestones are powerful triggers. Also rising: destination 'dupes,' coolcations, and digital-detox 'JOMO' travel.

● IN PRACTICE

Travelers book destination weddings, milestone-birthday trips and 'reset' getaways — and add buffer days to make the moment last.

● WHO'S THRIVING

Wedding-and-celebration specialists like **Sandals**, milestone honeymoon icons (**Maldives, Santorini, Bali**), and detox & retreat resorts.

ROATÁN'S READ

Roatán already converts milestones into loyalty — the certification dive, the anniversary trip, the wedding on the reef — it has simply never named or sold it. Whycation isn't a new market to enter so much as an existing strength to claim, package and sell back to the loyal base that already lives it.

Hilton · Booking.com · Amex · 2026

WHAT THEY AGREE ON

Strip away the vocabulary and one signal remains: the 2026 traveler is trading accumulation for meaning — taking fewer, longer, more intentional trips, paying a premium for experiences that change them, and rewarding the destinations that visibly protect what makes them worth the journey. Every force above is a facet of that single shift. For a destination with a living reef, a genuine dive culture and a loyal repeat base, the implication is unusually direct: the market is moving toward exactly what Roatán already is — if the island chooses to lead with it.

How Roatán builds its future on these trends.

Strategy is the discipline of choosing. Each of the eleven forces could spawn a dozen initiatives; the value of a plan lies in refusing most of them. What follows is a single coherent response — one position, three reinforcing pillars and a sequenced set of moves — built on assets Roatán already owns and precedents other destinations have already proven. It begins with an honest account of where the island stands.

01 THE STARTING POINT

Two economies, one island — and a clear direction.

Every strategy begins with an honest diagnosis. Roatán's tourism runs on two engines with opposite economics — and the entire plan turns on shifting weight from one to the other without dropping either.

3.1M visitors to Honduras in 2025 — a record, +11.6% YoY¹	63% arrive by cruise ship; ~30% stay overnight¹	1.7M cruise passengers to Roatán in 2024 — #1 in Central America²
\$802M overnight tourism receipts, 2024 (+47% vs 2019)⁴	~9x stay-over vs. cruise spend, per visitor⁷	62% of nearby Mesoamerican Reef sites poor or critical⁶

Cruise tourism

63%

of all visitor arrivals to Honduras come by cruise ship

Cruise delivers the volume — 2.9 million passengers reached Honduras in 2025, more than any country in Central America — but each is ashore only a few hours and spends on the order of \$105. Two ports serve them, including Carnival's expanding Isla Tropicale.^{1,2,3}

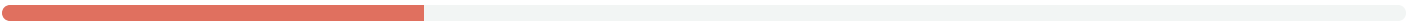


Stay-over tourism

5–10x

more spend per guest than a cruise day-tripper

A visitor who sleeps on the island spends close to **nine times** what a day-tripper does — roughly \$950 against ~\$105 — drawn by the diving, the Mesoamerican Reef and beach resorts, and they return year after year.^{4,7}



THE VALUE INVERSION

Most of the people. A fraction of the value.

Cruise day-trippers Stay-over visitors Same-day

Share of arrivals (2025)



Share of tourism revenue



Cruise brings 63% of arrivals but under a fifth of the value; overnight visitors are roughly 30% of arrivals yet more than four-fifths of tourism revenue. On current figures a stay-over guest spends close to **nine times** a cruise day-tripper — about \$950 against ~\$105. Shifting weight toward the coral bars is the entire strategy.^{1,3,4,7}

THE THESIS Protect and premiumize the reef-and-dive core. Convert cruise volume toward higher-yield stay-over and authentic experiences. Remove the friction — payments, connectivity, port hustle, expectation gaps — that quietly costs Roatán spend and repeat visits.

— 02 THE STRATEGY

One island, one story — three pillars that compound.

The opportunity isn't eleven separate trends to chase; it's one coherent move. Each pillar below bundles several of the trends from Part One, and the three reinforce one another — protect the asset, raise its value, remove the friction.

THE POSITIONING

Roatán — the Caribbean's regenerative dive-and-wellness island.

A reef you help protect · a place that helps you restore · effortless to reach, pay for and stay in. One story that turns eleven global trends into a single, coherent strategy.

PILLAR 01 · PROTECT

The Regenerative Reef

Make reef restoration a thriving part of the island's economy, not a line on a bill. Paid coral-restoration and 'adopt-a-coral' dives, a bureau-certified 'reef-positive operator' standard, resort- and developer-funded restoration, and a voluntary 'Roatán Pledge' — conservation funded by the experiences visitors already choose, never a fee for everyone.

DRAWS ON

Sustainable & regenerative

Adventure & marine

A healthier reef is the product everything else sells — the one asset Roatán can't replace.

The Restore-&-Celebrate Coast

Turn a dive trip into a longer, higher-value reason to stay — and return. 'Dive-and-Restore' wellness retreats, longevity & health-span programs via Próspera, an ultraluxe all-inclusive tier, and destination weddings & milestone dives — marketed to women, multigen and silver divers.

DRAWS ON Wellness & longevity Luxury Whycation Demographics Experiential

Longer, repeat, celebration-driven stays lift yield without needing more arrivals.

The Frictionless, AI-Ready Island

Make Roatán effortless to discover, pay for and stay in. An island-wide cashless economy on Próspera's fintech rails, an AI-discovery ('GEO') push so assistants recommend Roatán, and 'Connectivity-Guaranteed' long-stays for nomads.

DRAWS ON Technology & AI Work & travel Macro / value

Removing friction converts curiosity into spend, and short trips into long ones.

THE GOAL

Together, these three pillars **convert cruise volume into high-value stay-over** — the island's central opportunity — while protecting the reef the whole economy depends on.

03 THE PLAYS

Each trend, turned into a Roatán move.

If the three pillars are the bets, these are the initiatives that deliver them — each global force turned into one concrete Roatán move, with the play to run and a destination that has already proven it works.

QUICK WIN <12MO BUILD 1-3YR BIG BET 3YR+

Reef stewardship → a restoration economy

SUSTAINABLE

The opportunity: The reef is the island's single greatest asset — and its biggest risk. Travelers want to protect the places they visit (69–73% want their money reaching the community) — but the way to fund that isn't a fee everyone resents; it's restoration people choose to buy into.

The move: Help operators build reef-positive products travelers pay a premium for — coral-restoration and 'adopt-a-coral' dives, citizen-science experiences — and back a bureau-certified 'reef-positive operator' standard, with resort- and developer-funded restoration. No blanket fee.

BUILD

QUICK WIN

PROVEN BY **Coral Gardeners, French Polynesia** — an 'adopt-a-coral' movement that funds large-scale reef restoration through products and patronage, not a blanket fee.

PRIORITY

Wellness → 'Dive-and-Restore'

WELLNESS

The opportunity: Wellness is now the reason people travel, and it's a ~\$1T market led by North America — Roatán's #1 source region. The island already has the warm-water diving; pairing it with rest and recovery captures longer, higher-value stays.

The move: Package reef diving with sleep, spa and recovery programs at West Bay and Sandy Bay resorts, and add slow-travel retreats on the quiet east end.

BUILD

PILOT <12MO

PROVEN BY **BodyHoliday, St. Lucia** — a Caribbean resort built entirely on the dive-plus-wellness formula, routinely booked months ahead.

PRIORITY

Tech → the cashless economy

TECHNOLOGY

The opportunity: Cashless, mobile-first payment is now the baseline expectation — and Roatán's cash-only habits and high card fees are visitors' #1 spending complaint. Fixing it directly raises how much each guest spends on the island.

The move: Roll out cashless, mobile-first payments across the trade on modern, low-fee fintech rails — ending the cash-only friction that quietly costs the island spend.

QUICK WIN

BUILD

PROVEN BY **El Salvador's Bitcoin Beach (El Zonte)** — a small Central-American coast that built a working cashless visitor economy from scratch.

Experiential → skill & culture

EXPERIENTIAL

The opportunity: Travelers now buy skills and culture over sightseeing — 76% say a skill outlasts any souvenir. Roatán's diving and Garifuna heritage are exactly the hands-on, authentic experiences this traveler pays for.

The move: Make 'Learn to Dive' certification the hero product, build a Roatán culinary trail, and offer Garifuna cultural and cooking experiences.

QUICK WIN

BUILD

PROVEN BY Koh Tao, Thailand — a tiny island that became one of the world's busiest dive-certification capitals.

Adventure → marine & after-dark

ADVENTURE

The opportunity: Marine adventure is growing 5–12%/yr, and after-dark 'noctourism' is one of the fastest-rising niches. Roatán can extend the dive day into the evening and own a signature night-time experience.

The move: Premiumize the dive product and add night dives plus bioluminescence tours as a signature after-dark draw.

QUICK WIN

BUILD

PROVEN BY Vieques, Puerto Rico — its bioluminescent bay is the brightest on Earth and a bucket-list night excursion.

Demographics → smart targeting

DEMOGRAPHICS

The opportunity: Women make 82% of travel decisions and solo-female travel has multiplied — but the 'Honduras' safety label scares some away. Honest, targeted marketing turns that perception around and opens a fast-growing segment.

The move: Run safety-forward solo-female content (the Bay Islands are far safer than the mainland), plus multigen reef itineraries and silver-diver certification.

QUICK WIN

PROVEN BY Colombia — its 'the only risk is wanting to stay' campaign flipped a far harsher safety reputation into a tourism boom.

Work & travel → long-stay hub

WORK & TRAVEL

The opportunity: Remote workers choose destinations on connectivity, community and cost — and they stay for months, spending steadily. Roatán's diving plus the island's modern infrastructure is a rare combination.

The move: Create 'work-and-dive' long-stays anchored on reliable, high-grade connectivity and dedicated coworking space.

BUILD

PROVEN BY **Madeira's Digital Nomad Village** — a government-backed community that turned a small Atlantic island into a global remote-work hub.

Luxury & longevity → premium tier

LUXURY

The opportunity: Luxury demand is resilient and experience-led, and longevity retreats are a ~\$11B market growing ~13%/yr. Roatán can raise its ceiling with a premium, all-inclusive dive-and-wellness tier and, uniquely, health-span programming.

The move: Develop an ultraluxe, all-inclusive dive-and-wellness flagship — and longevity / health-span retreats built on the island's emerging biotech-and-wellness framework.

BIG BET

PROVEN BY **Sandals & Blue-Zone Costa Rica** — Caribbean luxury all-inclusive and Costa Rica's booming longevity resorts show both halves work.

Whycation → milestones & weddings

INTENTIONAL

The opportunity: People increasingly travel to mark milestones — and Roatán already has loyal repeat visitors who celebrate big moments here. Weddings and milestone trips bring groups, high spend and powerful word-of-mouth.

The move: Build destination weddings and vow renewals, milestone dives ('get certified for your 40th'), and an 'affordable paradise' message for value-seekers.

QUICK WIN

PROVEN BY **Sandals** — the Caribbean's wedding-and-honeymoon machine, with celebrations driving repeat visits for years.

The opportunity: Globally, visitor spend now grows faster than headcount, and Central & South America is the fastest-growing source region. Roatán's biggest gain comes from attracting higher-value stay-over guests, not just more cruise calls.

The move: Run a 'Beyond the Port' stay-over campaign to North America and a Spanish-language push into fast-growing South-American markets.

QUICK WIN

BUILD

PROVEN BY Costa Rica — it built a premium, high-value eco-tourism brand instead of chasing mass volume.

— 04 WHERE ROATÁN STANDS

An honest stocktake.

Before the build comes the diagnosis. Roatán's strengths are real and hard to copy; its weaknesses are largely self-inflicted, and therefore fixable; the opportunities are the eleven forces from Part One; the threats are mostly external, and must be designed around.

STRENGTHS

- World-class diving and a stretch of the Mesoamerican Reef — a genuinely scarce asset.
- Deep, well-earned repeat-visitor loyalty among divers.
- A clear, ownable identity the market already associates with the island.
- A ~40–50% price advantage on dive certification versus rival destinations.
- A modern economic platform (the Próspera ecosystem) most Caribbean rivals simply lack.

WEAKNESSES

- Thin, expensive airlift and a single constrained airport.
- Cash-dependent commerce and punitive card fees — visitors' top spending complaint.
- Uneven power and connectivity that can break a premium promise.
- A fragmented trade with limited island-wide coordination.
- Low brand awareness, and over-reliance on low-yield cruise volume.

OPPORTUNITIES

- Almost every 2026 trend — wellness, longevity, nomads, experiential, regenerative, AI — rewards what Roatán already is.
- A clean slate to leapfrog straight to a high-value, cashless, AI-native model.
- Convert cruise day-trippers into future stay-over guests.
- Own longevity and the diving remote worker before any rival claims them.

THREATS

- Cruise lines capturing visitor spend on purpose-built private islands.
- Reef degradation and bleaching — an existential risk to the core asset.
- The sticky 'Honduras' safety perception.
- Climate exposure and faster-moving competitors (Cozumel, Belize, Cayman).

How Roatán compares.

Roatán doesn't compete in a vacuum. Set against its real peers — the cruise giant next door, the same reef in Belize, the luxury benchmark in the Cayman Islands — one pattern stands out: Roatán leans hardest on low-yield cruise volume, while its neighbours have moved up.

DESTINATION	OVERNIGHT / STAY-OVER, 2024	CRUISE PASSENGERS, 2024	WHAT IT TELLS ROATÁN
Roatán / Honduras Dive value · cheapest certs	~0.84M ⁴	1.7M ²	Cruise-heavy, overnight-light — exactly the imbalance this plan corrects.
Cozumel, Mexico Cruise giant · day-trip	Day-trip dominated	4.6M ⁹	The cautionary tale: maximum cruise volume, minimal overnight yield.
Belize Same Mesoamerican Reef	0.56M ¹⁰ +21%	~0.8M ¹⁰	Same reef — but built a booming overnight business on aggressive airlift.
Cayman Islands Luxury · ~6-night stays	0.44M ¹¹	~0.75M ¹¹ ↓	Chose high-yield overnight over cruise volume — the premium aspiration.

Belize and the Cayman Islands — Roatán's closest peers by reef and region — grew by moving upmarket. Roatán's reef quality and price advantage make the same climb easier; the difference is choosing it deliberately.

— ROATÁN'S ADVANTAGE

The Próspera ecosystem: the platform to leapfrog.

Free economic zones are proven engines of development — and Roatán has one of the few in the hemisphere. **The Próspera ecosystem gives the island modern infrastructure, capital and talent exactly where the 2026 trends pay off** — which is why the moves in this plan are within reach now, not someday.

CONNECTIVITY

World-class internet & the island's best coworking space

Reliable, high-speed connectivity and a true coworking hub.

→ powers digital-nomad & bleisure long-stays — the deciding factor for that market.

FINTECH

Modern payment rails

A fintech-forward framework with seamless digital payments.

→ powers the cashless economy and seamless low-fee payments.

CAPITAL

Investment network

An international investor base and access to development capital.

→ funds premium dive-and-wellness lodging and new ventures.

INNOVATION

Biotech & longevity framework

An innovation-friendly environment for medical, diagnostic and longevity ventures.

→ unlocks longevity & health-span tourism beside the reef.

EVENTS

International conferences

A venue for global tech, biotech and finance gatherings.

→ seeds MICE & retreat demand, smoothing the off-season.

What it means: ease of doing business, modern infrastructure and a forward-looking investment climate let Roatán move on wellness, longevity, nomad and premium tourism faster than almost any rival in the Caribbean — the infrastructure side of the latecomer's advantage.

— 05 THE ROADMAP

What to build, and by when.

Strategy without sequence is a wish-list. Sequenced by depth: start in the shallows with quick wins that build credibility, then build the core, then commit to the big bets.

Quick wins

< 12 MONTHS

- "Learn to Dive in Roatán" certification packages
- Roatán culinary trail + Garifuna experiences
- Solo-female safety-forward content program
- Night dives + bioluminescence after-dark product
- West Bay peak-day crowd dispersal pilot
- "Destination dupe" + shoulder-season campaigns
- Milestone dives, weddings & vow renewals
- GEO / AI-discovery + cashless rollout

Build

1 – 3 YEARS

- Reef-positive operator standard + coral-restoration products
- "Dive-and-Restore" retreat product across resorts
- Island-wide cashless economy
- "Work-and-dive" long-stays + dedicated coworking
- Coral-restoration dive program at scale
- Formal Garifuna community-tourism platform
- South-American source-market marketing

Big bets

3 YEARS +

- Ultraluxe all-inclusive dive-and-wellness flagship
- Longevity / health-span retreats
- Premium lodging anchored by DUNA Tower & Pristine Bay
- Roatán as a credible nomad + retreat hub

What success looks like by 2030.

A strategy is only real when it can be measured. These are the few numbers that tell Roatán whether the plan is working — the dials to move, and the direction to move them.

The north star: by 2030, Roatán earns more from how much each visitor *values* the island than from how many step off a ship — a tourism economy measured in yield, loyalty and reef health, not headcount.

METRIC	TODAY	2030 TARGET
Stay-over share of tourism receipts The whole strategy in one number.	A minority of receipts	The majority
Spend per stay-over visitor Yield over volume.	5–10× a cruise day-tripper	Higher still, via wellness & premium
Average length of stay Longer stays compound spend and loyalty.	A dive week	Longer — retreats & long-stay nomads
Repeat-visitor rate Loyalty is the island's cheapest growth.	High, but informal	Tracked, and rising
Reef-positive certified operators Protecting the core asset, commercially.	None	The island standard
Low-season occupancy Nomads, retreats and MICE fill the calendar.	A deep annual trough	Materially smoother

Baselines and numeric targets to be calibrated against bureau and operator data — the direction of travel is the commitment.

Strategic advice for the island's trade.

The pillars and the plays describe what the island builds; this is **who builds it**. The future is made by the businesses on the ground — so here is exactly what each part of Roatán's tourism trade should do next, in priority order.



Hoteliers & resorts

Your highest-value guest — wellness, milestone, long-stay — wants a **reason to stay longer and return**, not just a bed.

- 1 Pilot a **'Dive-and-Restore'** wellness/sleep retreat with a dive partner.
- 2 Add **sleep-optimized 'Hushpitality' rooms** and a digital-detox option.
- 3 Build **multigen** and **milestone / wedding** packages.
- 4 Court the **long-stay & remote-work** guest with reliable-connectivity bundles.
- 5 Close the **quality / expectations gap** — rooms that match the photos.

PROVEN BY COMO Parrot Cay, Turks & Caicos — a Caribbean resort that made wellness its signature and its premium price.



Dive & tour operators

The reef is your product. **Protecting it and teaching it** is what turns a one-off dive into a lifelong customer.

- 1 Make **'Learn to Dive'** certification the hero stay-over product.
- 2 Launch **coral-restoration dives + night / bioluminescence** tours.
- 3 Build **reef-positive products** — restoration and adopt-a-coral dives — and turn protecting the reef into revenue.
- 4 Court **solo-female, silver and Gen Z** divers with tailored groups.
- 5 Lean on the **price-advantaged 'dupe'** message (~40–50% cheaper certs).

PROVEN BY **Bonaire's dive operators** — an entire economy built on certification, house-reef diving and a deep conservation culture.



Cruise-excursion operators

A few hours in port is a sales pitch: a great excursion turns a day-tripper into **next year's stay-over guest**.

- 1 Build a **premium 'authentic Roatán'** small-group, local-led tier.
- 2 Add **short transformational experiences** for time-limited port guests.
- 3 Partner on **crowd dispersal** away from West Bay on multi-ship days.
- 4 Professionalize the port experience to cut the **vendor-hustle** complaint.

PROVEN BY **Cozumel, Mexico** — a major cruise port whose certified, small-group dive operators built a lasting visitor economy.



Restaurateurs

Food is now a **reason to travel** — and the easiest spend to capture once you remove the payment friction.

- 1 Join a curated **Roatán culinary trail**; promote the local food travelers love.
- 2 Offer **Garifuna / local cooking classes** and fish-to-table experiences.
- 3 Adopt **low-fee cashless payments** to end the 'sticker shock' complaint.

PROVEN BY **Oaxaca, Mexico** — a region that became a global food destination by putting its local cuisine front and center.



Investors & developers

The clearest gap is **premium, reliable dive-and-wellness lodging** — and the island's free-zone framework makes building it faster.

- 1 Back **mid-to-premium dive-and-wellness lodging** — the clearest demand gap.
- 2 Leverage the **free-economic-zone framework** — capital, ease of business, modern infrastructure.
- 3 Build around **DUNA Tower & Pristine Bay** as anchors for the premium & long-stay market.
- 4 Pursue an **ultraluxe flagship** and a **longevity / health-span retreat**.

PROVEN BY **Placencia, Belize** — boutique, eco-led development on the same Mesoamerican Reef that drew premium and second-home demand.



Roatán Tourism Bureau

Your job is to **set the story and convene the island** around it — value over volume, reef first.

- 1 Own the **'value over volume'** positioning and source-market strategy.
- 2 Champion a **reef-positive operator standard** and the **cashless economy** across the trade.
- 3 Lead **GEO / AI-discovery** and the solo-female safety narrative.
- 4 Publish a **stay-over vs. cruise yield dashboard** the trade can act on.

PROVEN BY **ProColombia** — a national tourism body that flipped a harsh safety reputation into record-breaking arrivals.

— ◆ HONEST CAVEATS

What could go wrong.

A plan that lists only upside is marketing, not strategy. These are the risks most likely to derail this one — named plainly, because the dangers a destination refuses to name are the ones that sink it.

The reef declines faster than we protect it

Climate-driven bleaching could degrade the core asset faster than any restoration program can offset.

Discipline: fund restoration now, and broaden demand into wellness, longevity and nomad stays so the island isn't betting everything on the reef's health alone.

Infrastructure can't keep the promise

The longevity, nomad and premium bets all assume reliable power and connectivity; marketing 'work-and-dive' and then dropping the signal breaks trust instantly.

Discipline: treat redundancy as a prerequisite, not an upgrade — and never sell a promise the infrastructure can't yet keep.

Coordination stalls the island-wide moves

A reef-positive operator standard and a cashless economy need the whole trade to move together; a fragmented sector can dilute both into half-measures.

Discipline: start with quick wins that prove value, let the bureau convene, and sequence the hard collective moves behind early credibility.

The safety perception proves sticky

The 'Honduras' label is stubborn, and a single incident can undo months of narrative work.

Discipline: pair relentless, truthful storytelling with real safety investment — earn the reputation rather than just claim it.

Success erodes the thing being sold

Premiumization and a nomad influx can crowd West Bay and price out the community and authenticity that make Roatán worth visiting.

Discipline: disperse demand, share revenue with local communities, and treat carrying capacity as a design constraint, not an afterthought.

The easy cruise money becomes the trap

Cruise revenue is immediate and addictive; it can quietly fund the status quo and starve the harder stay-over shift of urgency.

Discipline: hold the line on 'value over volume' — treat cruise as a funnel into stay-over, never as the destination's ceiling.

The window is open. It will not stay open.

Every destination in this report's evidence base made the same choice at some point. Costa Rica, Madeira, Palau, Iceland — each stopped competing on price and committed, visibly and over years, to a single clear identity. None did it by accident, and none did it quickly. Roatán's rare advantage is that the trends, the assets and the proven precedents are aligned at the same moment — a window that seldom stays open long.

The cost of waiting is not neutral. **The reef does not pause.** The cruise lines do not stop building the private islands designed to keep visitors' spending offshore. And the position of the Caribbean's regenerative dive-and-wellness island will be claimed within this decade — by Roatán, or by someone reading the same data.

The work now is unglamorous and entirely within the island's control: choose the position deliberately, fund the few moves that compound, and hold the line on the story long enough for it to take. Do that, and by 2030 Roatán is no longer a cheaper stop on someone else's itinerary. It is a destination travelers plan their year around — and return to for the rest of their lives.

The reef is the asset. The trends are the tailwind. The rest is a decision.

SOURCES & NOTES

- 1 Honduran Institute of Tourism (IHT)**, 2025 arrivals, reported via the Roatán Tourism Bureau / roatan.online (Jan 2026): 3.1 million visitors (+11.6% YoY); cruise 63% of arrivals; ~30% overnight; 2.9 million cruise passengers, ~2 million disembarking.

- 2 **Roatán Tourism Bureau / IHT** (2024–25): the Bay Islands logged 502 cruise calls in 2025; Roatán received ~1.7 million cruise passengers in 2024, when Honduras became the #1 cruise destination in Central America.
- 3 **Roatán Tourism Bureau / BREA** (2024): cruise tourism generated an estimated \$180 million in economic impact in Honduras.
- 4 **UN Tourism — “Doing Business: Investing in Honduras” / IHT** (2024): international tourism receipts of US\$802 million (+47% vs 2019); ~841,000 overnight visitors; tourism ≈ 8.7% of national employment (≈325,000 jobs).
- 5 **IHT** (2025): leading source markets — United States, El Salvador, Guatemala and Nicaragua — together ≈ 83% of arrivals, with the United States the primary market.
- 6 **Healthy Reefs Initiative, 2024 Mesoamerican Reef Report Card** (healthyreefs.org): of 286 monitored sites, 39% poor and 23% critical (62% combined); overall grade “Poor”; 2024 brought the worst bleaching on record (~40% affected); under 10% of the reef is fully protected.
- 7 **Author's calculation** on IHT and UN Tourism data: spend per visitor of ≈ \$950 (overnight) versus ≈ \$105 (cruise) — a ratio near 9×. Figures are directional.
- 8 **Global reference base:** UN Tourism, WTTC, CLIA, the Global Wellness Institute, Skift, Booking.com, American Express and Virtuoso (2025–26), as cited per trend in Part One.
- 9 **APIQROO / Riviera Maya News** (2024): Cozumel received 4.6 million cruise passengers on ~1,281 ships — the world's busiest cruise port of call.
- 10 **Belize Tourism Board** (2024): 562,405 overnight visitors (+21% YoY, a record) and ~0.8 million cruise passengers; tourism revenue ≈ US\$1.4 billion.
- 11 **Cayman Islands Department of Tourism** (2024): 437,842 stay-over visitors (+2%, luxury-led, ~6-night average stay) and ~0.75 million cruise passengers (declining); 884,279 airline seats.



Global trends · Roatán's future · the playbook. Protect the reef, premiumize the dive core, convert volume into yield, and build on the Próspera ecosystem's advantage.

ROATÁN TOURISM BUREAU · PRÓSPERA ECOSYSTEM
2026 STRATEGY REPORT · V2

SOURCES: UN TOURISM · WTTC · IATA · CLIA
GWI · BOOKING.COM · SKIFT · AMEX · VIRTUOSO
CORAL GARDENERS · CTO · RTB · ROATAN.ONLINE

FIGURES ARE DIRECTIONAL