

Tourism Statistical Review

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Bahamas Ministry of Tourism & Aviation



In February 2020:

- Air & sea arrivals were up 17.0% for the month and 12.3% 2020 YTD.
- Stopover arrivals were down 8.8% for the month and 9.1% for 2020 YTD.
- Cruise arrivals were up 25.2% for the month of February and up 17.8% for 2020 YTD.
- Forward air bookings for March were trending behind 2019.

Total Visitor Arrivals

In February 2020, The Bahamas received **711.7K** foreign air and sea arrivals, an increase of **17.0%** relative to February 2019, but air arrivals to the Bahamas as a whole declined by **3.1%** and stood at **146.5K**.

Air arrivals during the month were down in Grand Bahama (-48.6% to 3.5K), Abaco (-77.6% to 2.2K), Bimini (down 27.9% to 1.3K), and San Salvador (-31% to 1.2K).

Air arrivals during the month were up in Nassau/Paradise Island (up 5.9% to 122.2K), Andros (up 1.9% to 808), Berry Islands (up 18.6% to 919), Cat Cay (up 27.3% to 354), Cat Island (up 7.6%), Eleuthera (up 4.6% to 6.8K), Exuma (up 1.6% to 6.9K), and Long Island (up 36.0%).

In February 2020, stopover arrivals were **150.2K**, an **8.8%** decrease, compared to February 2019. This reflects decreased stopover arrivals to some major island destinations in

the Bahamas like Abaco and Grand Bahama and decreased arrivals from most source markets except Canada and the Middle East.

By the end of February YTD, stopovers Nassau/Paradise Island (up 0.3%), Andros (up 2.2%), and Mainland Eleuthera (up 1.5%) had experienced growth during the period.

In the monthly summary report dated February 2020 by Forward Keys, forward bookings for air travel in March were

down by 20.7% compared to the same period of 2019.

In February 2020 YTD, average hotel occupancy for large hotels on Nassau/Paradise Island was 72.8%, down 0.8% percentage pts. from 2019, while average daily room rates were down 1.1% to \$266.71 contributing to a 0.7% decline in hotel room revenues.

Meanwhile, cruise arrivals were up 17.8% in February 2020 YTD to 1.1M, reflecting an increase of 72.8% for the Out Islands.

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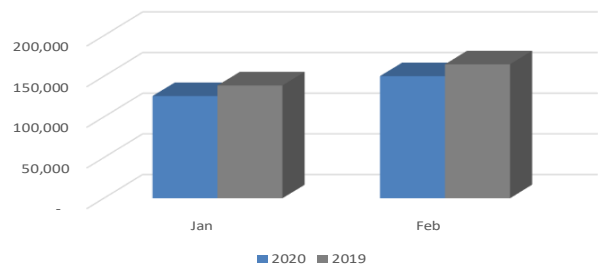
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Stopover Arrivals By Month



Stopover Arrivals (February YTD)

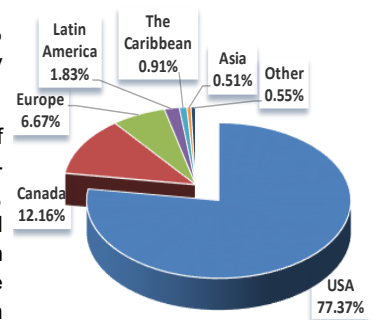
From January to February 2020, The Bahamas received **275.96K** stopovers, (down 9.1% compared to the same period in 2019).

This reflects decreases in stopovers from the United States (down 8.5%), Europe (down 23.9%), Latin America (down 22.5%), Asia (down 51.6%), Africa (down 15.9%), and Australasia (down 27.5%).

Stopover visitors increased by

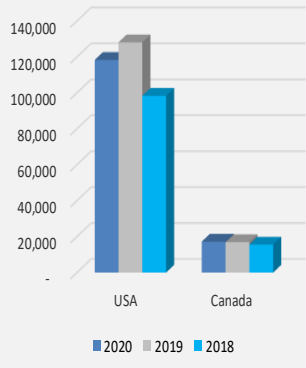
4.5% from Canada, and 4.2% from the Middle East for January to February YTD.

For the year to date, **77.4%** of stopover visitors (**213.5K**) originated from the United States, while **12.2%** (**33.6K**) originated from Canada, **6.7%** (**18.4K**) from Europe, **0.9%** (**2.5K**) from the Caribbean, **1.8%** (**5.0K**) from Latin America, and **1.1%** (**2.9K**) from the rest of the world.



Source Regions 2020 YTD

February Stopover Arrivals



North American Arrivals

United States

In February 2020, **118.4K** stopover arrivals were received from the United States, a decrease of **7.6%**, compared to February 2019.

In this regard, arrivals from all sales territories across the US declined, including: the Northeast (down 1.4% to 49.2K), the Midwest (down 7.0% to 34.0K), the Southeast (down 6.0% to 11.97K), and Florida (down 22.6% to 15.5K).

In February 2020 YTD the top 10 producing states were New York (up 0.1%), Florida (down 20.6%), Massachusetts (up 11.1%), New

Jersey (down 2.5%), Pennsylvania (down 7.1%), California (down 5.3%), Texas (down 19.4%), Illinois (down 16.2%), Georgia (down 5.5%), and Michigan (down 4.1%).

The top ten DMAs during the period were: New York, Boston (Manchester), Miami-Ft. Lauderdale, Washington DC (Hagerstown), Philadelphia, Chicago, Atlanta, West Palm Beach-Ft. Pierce, Los Angeles, and Detroit.

Canada

In February 2020, **17.2K** stopover arrivals were received from Canada, an increase of **1.9%**,

compared to February 2019.

In February 2020 YTD, the top five producing provinces for stopovers were: Ontario (up 2.7%), Quebec (up 16.7%), Alberta (up 7.6%), British Columbia (up 1.8%), and Manitoba (up 12.5%).

The top ten producing cities YTD were: Toronto, Montreal, Mississauga, Ottawa, Calgary, Oakville, Brampton, London, Hamilton and Burlington.

In February, European arrivals were down 23.0% for the month and 23.9% YTD.

European Arrivals

In February 2020, **9.6K** stopover arrivals were received from European countries, a decrease of **23.0%**, compared to February 2019.

In February 2020, stopover arrivals from all sales territories across Europe were down, including: the UK, covering Italy, Netherlands, and the Nordic

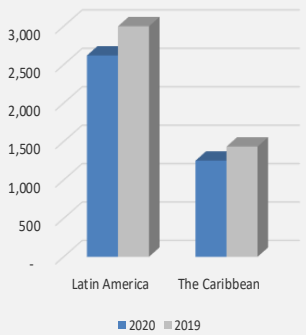
region (down by 15.1%); France, covering Spain, Belgium, Portugal, Luxembourg, Monaco and Andorra (down 20.6%); and Germany, covering Central and Eastern Europe (down 36.7%).

By the end of February YTD, the top ten producing countries for stopover visitors 2020 were: the United Kingdom, France, Ger-

many, Italy, Switzerland, Poland, Spain, Netherlands, Russia, and Romania.

The top ten producing cities were: London, Paris, Rome, Moscow, Portland, Milan, Munich, Stockholm, Vienna and Constanta.

February Stopover Arrivals



Latin American & Caribbean Arrivals

Latin America

In February 2020, **2.6K** stopover arrivals were received from Latin American countries, a decrease of **12.7%** compared to February 2019.

By the end of February YTD the top ten producing countries for stopover visitors during the period were: Brazil, Argentina, Mexico, Columbia, Chile, Panama, Peru, Venezuela, Uruguay and Ecuador.

The top ten producing cities were: Sao Paulo, Buenos Aires,

Rio de Janeiro, Santiago, Bogota, Panama City, Mexico City, Lima, Guatemala City, and Montevideo.

The Caribbean

In February 2020, **1,261** stopover arrivals were received from Caribbean countries, an increase of **11.8%**, compared to February 2019.

By the end of February YTD, the top ten producing countries for stopover visitors were: Jamaica, Trinidad and Tobago, Turks and Caicos, Cayman Islands, Puerto

Rico, Dominican Republic, Barbados, Bermuda, Haiti, and St. Lucia.

The top ten producing cities were: Kingston, Lucea, George Town, Montego Bay, West Bay, St. Catharines, Spanish Town, Port of Spain, Guaynabo, and Chaguanas Borough.

Arrivals from the Rest of the World

Asia

In February 2020, **476** stopover arrivals were received from Asian countries, a decrease of **75.8%** compared to February 2019. **1.4K** Asian visitors were received by February 2020 YTD, a 51.6% decrease from the same period in 2019.

The top ten producing countries for stopover visitors for February 2020 YTD were: China, Philippines, India, Japan, South Korea, Hong Kong, Singapore, Indonesia, Armenia, and Thailand.

The top ten producing cities were: Shanghai, Beijing, Caba, Seoul, Mumbai, Tokyo, Shenzhen, Xi'an, Baku and Osaka.

Australasia

In February 2020, **262** stopover arrivals were received from Australasian countries, a de-

crease of **24.5%** compared to February 2019.

The top three producing countries for stopover visitors in February 2020 YTD were: Australia, New Zealand, and Fiji.

Africa

In February 2020, **210** stopover arrivals were received from African countries, a decrease of **15.7%** compared to February 2019.

The top five producing countries for stopover visitors for February YTD 2020 were: South Africa, Kenya, Morocco, Mauritius, and Nigeria.

The top five producing cities were: Johannesburg, Cape Town, Durban, Pretoria, and Nairobi.

Middle East

In February 2020, **178** stopover

arrivals were received from Middle Eastern countries, an increase of **24.5%** compared to February 2019.

The top five producing countries for stopover visitors for February 2020 YTD were: Israel, United Arab Emirates, Jordan, Saudi Arabia and Qatar.

The top five producing cities were: Dubai, Tel Aviv-Yafo, Ramat Gan, Abu Dhabi and Irbid.

In February, stopover arrivals from Asia, Australasia, and Africa were down for the month and YTD. Stopover arrivals from the Middle East, however, were up in February and 2020 YTD.

Visitor Arrivals By Island

In February 2020, stopover arrivals decreased for most of the destinations in the Bahamas with the exception of Nassau.

During the month stopover visitor arrivals were down for the following islands: Grand Bahama (-47.1% to 6.7K), Abaco (-77.0% to 2.3K), Berry Islands (-29.2% to 189 visitors), Bimini (-16.1% to 3.7K), Mainland Eleuthera (-1.2% to 3.9K), Harbour Island in Eleuthera (-3.2% to 1.9K), Exuma (-13.0% to 10.6K), and San Salvador (-8.5% to 1.7K).

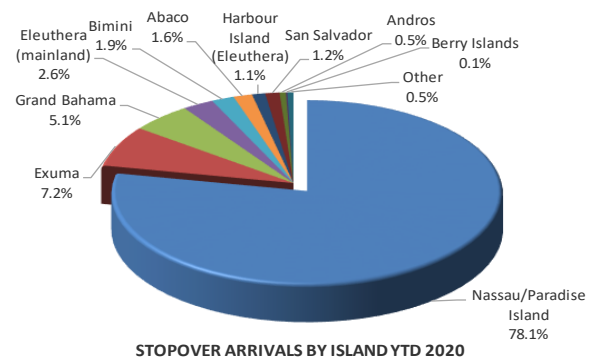
Comparatively, stopovers to Nassau/Paradise Island were up 1.7% to 117.7K visitors during the month.

From January to February 2020, compared to the same period in 2019, Nassau received **215.5K** stopover visitors, an increase of

0.3%. Stopovers were also up during the period for islands like Andros (up 2.2% to 1.4K), Mainland Eleuthera (up 1.5% to 7.3K) and Long Island (up 7.9% to 781 visitors) while arrivals to Grand Bahama Island decreased by 40.6% and stood at **14.2K** YTD.

Decreased stopovers February YTD were also noted on other Islands like Abaco (down 74.7% to 4.4K), Bimini (down 22.1% to 5.3K), Cat Cay (down 20.6% to 158 visitors), Cat Island (down 22.2% to 332 visitors), Crooked Island (down 31.8% to 45), Exuma (down 14.3% to 19.8K), Harbour Island Eleuthera (down 8.1% to 3.0K) and San Salvador (down 14.1% to 3.3K).

In February YTD 2020, Nassau was the top island destination for visitors from all source markets,



receiving **78.1%** of stopover arrivals, followed by Exuma which had 7.2% and Grand Bahama with 5.1%.

Eleuthera as a whole including Harbour Island had **3.7%** of the market share of stopovers: i.e., Eleuthera mainland with **2.6%** and Harbour Island with **1.1%**. The next biggest destination for stopovers to the Bahamas was Bimini with **1.9%** of the visitors. Abaco rounded out the top islands for stopovers, with **1.6%** of arrivals.

Travel Trends

From January to February 2020, the average length of stay of stopover visitors to The Bahamas was 6.2 nights with 59.5% staying 4 to 7 nights, 23.5% staying 2 to 3 nights, and 8.9% staying 8 to 14 nights.

Among the main source markets not including Africa (16.6 nts.) visitors from Latin America (8.3 nights), Europe (8.4 nights), and Australasia (9.5 nights) stayed the longest on average, compared to an average stay of 5.7 nights for US visitors.

During this period, 84.2K visitors,

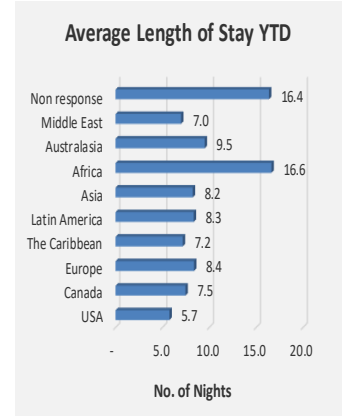
or 30.5% of visitors from all regions, were repeat visitors, with the largest proportion of repeat visitors from the main source markets coming from the Caribbean (i.e., 40.0% were repeat visitors), Africa (i.e. 32.6%), the US (i.e., 31.6%) and the lowest from Asia (13.2%).

During the period, 68.3% of all stopover visitors came to The Bahamas primarily for a vacation, with 9.9% coming for weddings and honeymoons, and 7.6% for business.

Approximately nine in ten (89%)

of these visitors stayed in hotels, 2.7% in vacation rentals/ apartments or villas, 3.0% in timeshare properties, 0.8% on private boats and 1.8% with friends and relatives.

The average age of stopover visitors during this period was 42.1 years, with 50.8% of all visitors being between the ages of 25 and 54 years. As such, Generation X and Millennials accounted for 27.0% and 26.5% of visitors, respectively, followed by Baby Boomers (20.9%) and Post-Millennials (15.2%).



Mode of Arrival

From January to February 2020, 89.6% of stopover visitors to The Bahamas arrived by commercial airline, 6.3% by private plane, 1.0% by private boat/yacht, and 2.1% by cruise ship. This generally reflects the travel patterns of US visitors.

For most other source regions, the proportions of stopover visitors arriving by commercial airline and/or cruise ship varied from this trend, while arrivals by other means dropped lower. For instance, for the Middle East, Canada and the Caribbean, arrivals by commercial airline were 87.4%, 95.0% and 91.2%, respectively.

In addition, 87.6% of Europeans arrived by commercial airline, while 4.8% arrived by cruise ship; 4.7% of Latin Americans and 4.3% of arrivals from Asia arrived by cruise ship.

Seventy-five percent (75.1%) of Africans arrived by commercial airline, with 10.8% arriving by yacht and 6.2% by cruise ship. Meanwhile, 2.6% of Australasian visitors arrived by yacht.

Airlift

In February YTD, the top ten commercial airlines were: American Airlines, Delta Air Lines, JetBlue, United Airlines, Air Canada, Southwest Airlines, Bahamasair, WestJet, Silver Airways and British Airways.

For the US YTD, American Airlines delivered the most stopover visitors from the Midwest (19.8K), followed by Delta (16.1K) and United (7.0K). Delta delivered the most visitors from the Northeast (20.96K), followed by American (20.0K) and Jetblue (16.9K). Delta delivered the most visitors from the Southeast (8.95K), followed by American (6.8K) and Southwest Airlines (1.1K). JetBlue delivered the most visitors from Florida (6.1K), followed by American (5.4K) and Bahamasair (3.8K).

For Canada YTD, Air Canada delivered the most stopover visitors (13.98K) followed by WestJet (9.96K), and Sunwing (4.4K).

For Europe YTD, American Airlines delivered the most stopover visitors (5.0K), followed by British Airways (4.0K) and Baha-

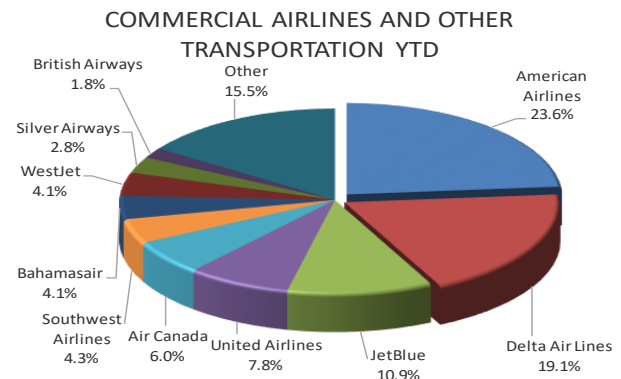
masair (2.1K).

For Latin America YTD, American Airlines delivered the most stopover visitors (2.0K), followed by Copa Airlines (640 visitors) and Bahamasair (494 visitors).

For the Caribbean YTD, American Airlines delivered the most stopover visitors (841 visitors), followed by Caribbean Airlines (566 visitors) and Bahamasair (199 visitors).

For the Rest of the World YTD, American Airlines delivered the most stopover visitors (731 visitors), followed by Bahamasair (393 visitors) and Delta (376 visitors).

As of February, 9.9% of stopover visitors in February 2020, came to The Bahamas primarily for weddings and honeymoons.



Cruise Arrivals

In February 2020, cruise arrivals were up 25.2% for the month, and up 17.8% YTD.

In February 2020, The Bahamas received 557.8K cruise arrivals by first port of entry, an increase of 25.2% relative to February 2019. This reflects increased cruise arrivals over 2019 to cruise destinations like Grand Bahama (up 10.4%), the Berry Islands i.e., Great and Little Stirrup Cays aka Coco Cay (up 181.7% to 145.2K), Bimini including Ocean Cay (up significantly to 27.5K), and Half Moon Cay aka Little San Salvador (up 56.2% to 54.0K).

Comparatively, at 237.5K cruise visitors, Nassau / Paradise Island was down by 2.0%, Castaway Cay Abaco down 36.3% to 21.3K), and Princess Cay Eleuthera down 29.6% to 31.7K (first port of entry).

If one looked at Nassau/Paradise Island in isolation by 1st, 2nd and 3rd port of entry for the month, cruise arrivals to the island would be up by 7.7%.

Meanwhile, cruise arrivals February YTD increased by 17.8%

to 1.1M. In this regard, cruise arrivals to the Out Islands increased significantly by 72.8 (first port of entry).

The YTD increase in Out Island cruise arrivals reflects the significant increase in arrivals to the Berry Islands (Great and Little Stirrup Cays), which were up by 196.5% YTD to 273.4K, Bimini up significantly to 52.8K and Half Moon Cay up 26.5% to 108.6K.



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The Ministry of Tourism is a national destination management agency for the Islands of The Bahamas—mandated to advertise and promote the destination, as well as to strategically facilitate the growth of the commercial tourism industry.

For further information or details regarding our statistics, please contact our Research and Statistics Unit at (242) 302-2094 or gdelancy@bahamas.com.

Tables and Charts

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Foreign Air & Sea Arrivals - February [first port of entry only]

| | 2020 | 2019 | 2020/2019 | 2020 | 2019 | %Chg 20/19 |
|------------------------|----------------|----------------|---------------|----------------|----------------|--------------|
| | Air and Sea | | % Chg Air/Sea | Air Only | | % Chg Air |
| Nassau/Paradise Island | 361,188 | 359,228 | 0.5% | 122,219 | 115,400 | 5.9% |
| Grand Bahama | 46,693 | 47,756 | -2.2% | 3,493 | 6,795 | -48.6% |
| Abaco | 23,727 | 44,185 | -46.3% | 2,240 | 9,995 | -77.6% |
| Andros | 822 | 806 | 2.0% | 808 | 793 | 1.9% |
| Berry Islands | 146,536 | 52,812 | 177.5% | 919 | 775 | 18.6% |
| Bimini | 30,959 | 7,612 | 306.7% | 1,315 | 1,824 | -27.9% |
| Cat Cay | 572 | 743 | -23.0% | 354 | 278 | 27.3% |
| Cat Island | 99 | 97 | 2.1% | 99 | 92 | 7.6% |
| Eleuthera | 38,622 | 51,669 | -25.3% | 6,765 | 6,468 | 4.6% |
| Exuma | 6,960 | 6,820 | 2.1% | 6,870 | 6,760 | 1.6% |
| Half Moon Cay | 54,007 | 34,572 | 56.2% | - | - | 0.0% |
| Inagua | 69 | 123 | -43.9% | 21 | 62 | -66.1% |
| Long Island | 193 | 126 | 53.2% | 155 | 114 | 36.0% |
| San Salvador | 1,252 | 1,822 | -31.3% | 1,228 | 1,780 | -31.0% |
| Bahamas Overall | 711,699 | 608,371 | 17.0% | 146,486 | 151,136 | -3.1% |

Source: Immigration and Customs various ports of entry in the Bahamas, & Research and Statistics Dept. Ministry of Tourism. All numbers are subject to revision.

Foreign Air & Sea Arrivals - February YTD [first port of entry only]

| | 2020 | 2019 | 2020/2019 | 2020 | 2019 | %Chg 20/19 |
|------------------------|------------------|------------------|---------------|----------------|----------------|--------------|
| | Air and Sea | | % Chg Air/Sea | Air Only | | % Chg Air |
| Nassau/Paradise Island | 706,506 | 761,930 | -7.3% | 227,380 | 216,958 | 4.8% |
| Grand Bahama | 84,831 | 96,590 | -12.2% | 6,302 | 12,577 | -49.9% |
| Abaco | 61,662 | 83,915 | -26.5% | 4,207 | 17,084 | -75.4% |
| Andros | 1,532 | 1,422 | 7.7% | 1,502 | 1,396 | 7.6% |
| Berry Islands | 275,905 | 94,407 | 192.3% | 1,686 | 1,387 | 21.6% |
| Bimini | 59,670 | 11,913 | 400.9% | 2,453 | 2,789 | -12.0% |
| Cat Cay | 1,171 | 1,316 | -11.0% | 620 | 543 | 14.2% |
| Cat Island | 200 | 165 | 21.2% | 197 | 153 | 28.8% |
| Eleuthera | 82,737 | 90,556 | -8.6% | 11,675 | 11,318 | 3.2% |
| Exuma | 12,760 | 12,967 | -1.6% | 12,589 | 12,835 | -1.9% |
| Half Moon Cay | 108,588 | 85,840 | 26.5% | - | - | 0.0% |
| Inagua | 149 | 210 | -29.0% | 77 | 95 | -18.9% |
| Long Island | 327 | 217 | 50.7% | 289 | 199 | 45.2% |
| San Salvador | 2,861 | 3,804 | -24.8% | 2,817 | 3,714 | -24.2% |
| Bahamas Overall | 1,398,899 | 1,245,252 | 12.3% | 271,794 | 281,048 | -3.3% |

Source: Immigration and Customs various ports of entry in the Bahamas, & Research and Statistics Dept. Ministry of Tourism. All numbers are subject to revision.

Foreign Air & Sea Arrivals - Year to Date [first port of entry only]

| | Air and Sea Arrivals | | | Air Arrivals Only | | |
|--------------------|----------------------|------------------|--------------|-------------------|----------------|--------------|
| | 2020 | 2019 | %Chg 20/19 | 2020 | 2019 | %Chg 20/19 |
| January | 687,200 | 636,881 | 7.9% | 125,308 | 129,912 | -3.5% |
| February | 711,699 | 608,371 | 17.0% | 146,486 | 151,136 | -3.1% |
| Grand Total | 1,398,899 | 1,245,252 | 12.3% | 271,794 | 281,048 | -3.3% |

Source: Immigration , Customs various ports of entry in the Bahamas, and Port Authorities. Research and Statistics Dept. Ministry of Tourism

All numbers are subject to revision

All Stopover Arrivals—February

Region



USA



Canada



Europe



Latin America



The Caribbean

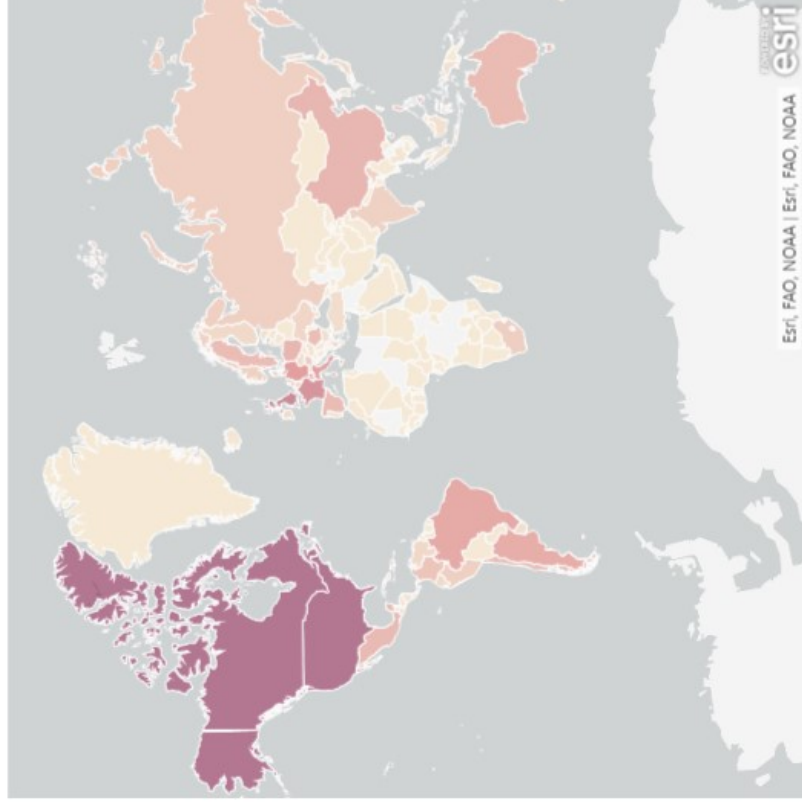


Asia

Total Arrivals by Country (of residence)

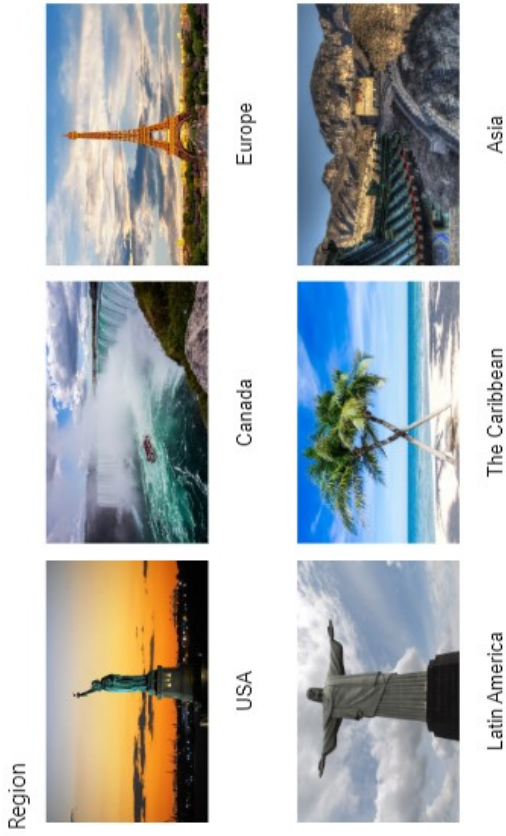
| Region | 2020 | 2019 | 2018 | 2017 | 2016 | Total |
|---------------|----------------|----------------|----------------|----------------|----------------|----------------|
| USA | 118,356 | 128,147 | 98,406 | 85,785 | 92,288 | 522,982 |
| Canada | 17,249 | 16,926 | 15,583 | 14,140 | 16,864 | 80,762 |
| Europe | 9,572 | 12,438 | 12,653 | 9,470 | 8,867 | 53,000 |
| Latin America | 2,620 | 3,000 | 4,053 | 2,831 | 2,553 | 15,057 |
| The Caribbean | 1,251 | 1,434 | 1,623 | 1,578 | 1,575 | 7,461 |
| Asia | 476 | 1,971 | 1,632 | 719 | 646 | 5,444 |
| Australasia | 262 | 347 | 427 | 383 | 381 | 1,800 |
| Africa | 210 | 249 | 276 | 192 | 161 | 1,088 |
| Middle East | 178 | 143 | 386 | 104 | 125 | 936 |
| Non response | 66 | 144 | 283 | 102 | 66 | 661 |
| Total | 150,240 | 164,799 | 135,322 | 115,304 | 123,526 | 689,191 |

Visitor Concentration by Country (of residence)

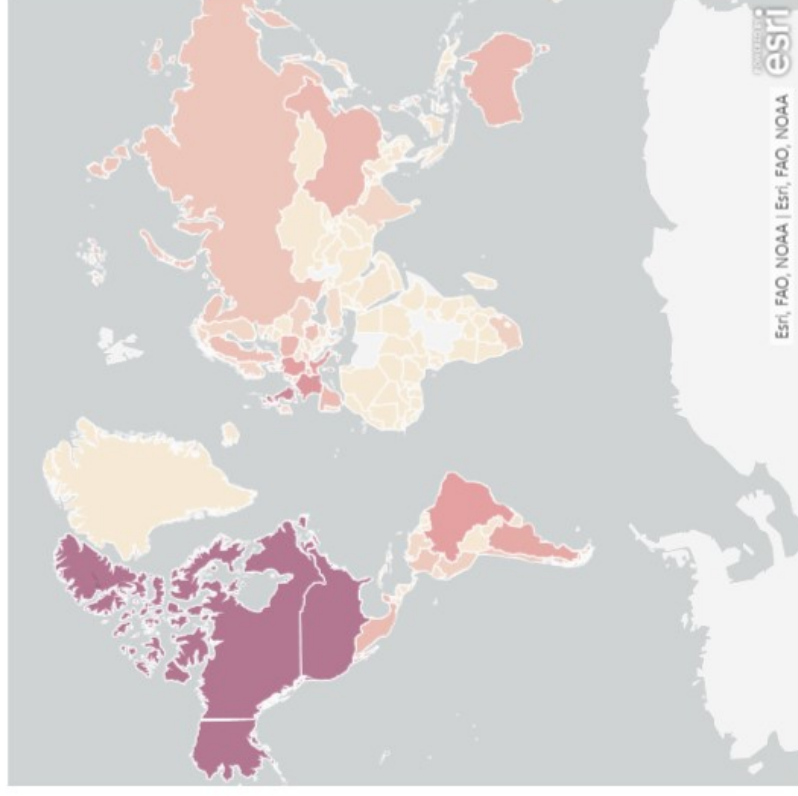


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All Stopover Arrivals—February YTD



Visitor Concentration by Country (of residence)



| Region | 2020 | 2019 | 2018 | 2017 | 2016 | Total |
|---------------|----------------|----------------|----------------|----------------|----------------|------------------|
| USA | 213,517 | 233,302 | 171,607 | 153,701 | 162,163 | 934,290 |
| Canada | 33,565 | 32,130 | 28,885 | 26,615 | 31,234 | 152,429 |
| Europe | 18,396 | 24,176 | 23,629 | 18,993 | 18,182 | 103,376 |
| Latin America | 5,042 | 6,504 | 8,438 | 6,491 | 6,230 | 32,705 |
| The Caribbean | 2,525 | 2,562 | 2,909 | 3,219 | 2,999 | 14,214 |
| Asia | 1,410 | 2,913 | 2,781 | 1,544 | 1,216 | 9,864 |
| Australasia | 669 | 923 | 901 | 874 | 1,057 | 4,424 |
| Africa | 414 | 492 | 542 | 332 | 387 | 2,167 |
| Middle East | 326 | 313 | 539 | 304 | 256 | 1,738 |
| Non response | 99 | 285 | 582 | 168 | 108 | 1,242 |
| Total | 275,963 | 303,600 | 240,813 | 212,241 | 223,832 | 1,256,449 |