### Tourism Statistical Review

Volume 2, Issue 1

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### January 2020

Bahamas Ministry of Tourism & Aviation



### In January 2020:

- Air & sea arrivals were up 7.9% for the month.
- Stopover arrivals were down 12.0% for the month.
- Cruise arrivals were up 11.3% for the month of January.
- Forward air bookings for February were trending behind 2019.

### Total Visitor Arrivals

In January 2020, The Bahamas received **687.2K** foreign air and sea arrivals, an increase of **7.9%** relative to January 2019, but air arrivals to the Bahamas as a whole declined by **3.5%** and stood at **125.3K**.

Air arrivals during the month were down in Grand Bahama (-51.4% to 2.8K), Abaco (-72.3% to 1.97K), Exuma (-5.9% to 5.7K) and San Salvador (-17.8% to 1.6K).

Air arrivals during the month were up in Nassau/Paradise Island (up 3.5% to 105.2K), Andros (up 15.1% to 694), Berry Islands (up 25.3% to 767), Bimini (up 17.9% to 1.1K), Cat Cay (up 0.4% to 266), Eleuthera (up 1.2% to 4.9K), Inagua (69.7% to 56) and Long Island (up 57.6%).

In January 2020, stopover arrivals were **122.2K**, a **12.0%** decrease, compared to January 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 Caribbean

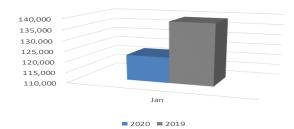
At mid January 2020, according to Forward Keys in the monthly summary report dated January 2020, forward bookings for air travel in February were behind by 1.7% compared to the same period of 2019.

In January 2020, average hotel occupancy for large hotels on Nassau/Paradise Island was 69.3%, down 0.6% percentage

pts. from 2019, while average daily room rates were down 1.7% to \$261.01 contributing to a 2.5% decline in hotel room revenues.

Meanwhile, cruise arrivals were up **11.3% in January 2020** to 555.3K, reflecting an increase of 77.9% for the Out Islands.

### Stopover Arrivals by Month



### Inside this report:

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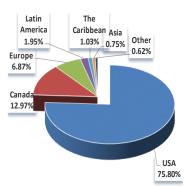
### Stopover Arrivals (January)

In January 2020, The Bahamas received **122.2K** stopovers, (down 12.0% compared to the same period in 2019).

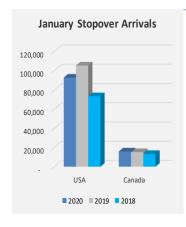
During the month, **75.8%** of stopover visitors (92.6K) originated from the United States, while **13.0%** (**15.9K**) originated from Canada, **6.9%** (**8.4K**) from Europe, **1.0%** (**1.3K**) from the Caribbean, **2.0%** (**2.4K**) from Latin America, and **1.4%** (**1.7K**) from the rest of the world.

This reflects decreases in stopovers from the United States (down 11.9%), Europe (down 28.5%), Latin America (down 31.9%), Asia (down 2.3%), Africa (down 22.5%), Middle East (down 14.1%), and Australasia (down 30.9%).

Stopover visitors increased by 4.2% from Canada, and 11.8% from the Caribbean during the month.



Source Regions 2020



### North American Arrivals

### **United States**

In January 2020, **92.6K** stopover arrivals were received from the United States, a decrease of **11.9%**, compared to January 2019.

In this regard, arrivals from all sales territories across the US declined, including: the Northeast (down 3.2% to 35.1K), the Midwest (down 14.2% to 28.1K), the Southeast (down 14.2% to 9.9K), and Florida (down 21.2% to 13.2K).

In January 2020 the top 10 producing states were New York, Florida, New Jersey, Pennsylvania, California, Massachusetts,

Texas, Illinois, Georgia, and Virginia.

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

### Canada

In January 2020, **15.9K** stopover arrivals were received from Canada, an increase of **4.2%**, compared to January 2019.

The top five producing provinces for stopover visitors in January

2020 were: Ontario, Quebec, Alberta, British Columbia, and Manitoba.

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

### In January, European arrivals were down 28.5% for the month.

### European Arrivals

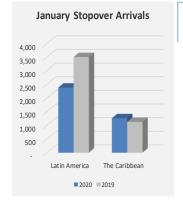
In January 2020, **8,395** stop-over arrivals were received from European countries, a decrease of **28.5%**, compared to January 2019.

In January 2020, arrivals varied from sales territories across Europe, including: the UK, covering Italy, Netherlands, and the Nordic region (down by 20.1%);

France, covering Spain, Belgium, Portugal, Luxembourg, Monaco and Andorra (down 41.7%); and Germany, covering Central and Eastern Europe (down 31.9%).

The top ten producing countries for stopover visitors in January 2020 were: the United Kingdom, France, Italy, Germany, Switzerland, Russia, Poland, Romania, Netherlands, and Spain.

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



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### Latin American & Caribbean Arrivals

### Latin America

In January 2020, **2,385** stop-over arrivals were received from Latin American countries, a decrease of **31.9%** compared to January 2019.

The top ten producing countries for stopover visitors during the period were: Brazil, Argentina, Mexico, Columbia, Peru, Chile, Panama, Venezuela, Guatemala and Paraguay.

The top ten producing cities were: Sao Paulo, Buenos Aires, Rio de Janeiro, Panama City,

Bogota, Guatemala City, Asuncion, Lima, Santiago, and Montevideo.

### The Caribbean

In January 2020, **1,261** stop-over arrivals were received from Caribbean countries, an increase of **11.8%**, compared to January 2019.

The top ten producing countries for stopover visitors January 2020 were: Jamaica, Turks and Caicos, Cayman Islands, Trinidad and Tobago, Barbados, Puerto Rico, Dominican Republic, Bermuda, St. Lucia, and Antigua and Barbuda.

The top ten producing cities were: Kingston, Lucea, Montego Bay, George Town, West Bay, Guaynabo, St. Catharines, St. John's, Spanish Town and Willemstad.

### Arrivals from the Rest of the World

### Asia

In January 2020, **920** stop-over arrivals were received from Asian countries, a decrease of **2.3%** compared to January 2019.

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

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

### Australasia

In January 2020, **398** stopover arrivals were received from Australasian countries, a decrease of **23.7%** compared to January 2019.

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

### Africa

In January 2020, **189** stopover arrivals were received from African countries, a decrease of **22.5%** compared to January 2019.

The top five producing countries for stopover visitors in January 2020 were: South Africa, Mauritius, Nigeria, Kenya, and Ghana.

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

### Middle East

In January 2020, **146** stopover arrivals were received from Middle Eastern countries, a

decrease of **14.1%** compared to January 2019.

The top five producing countries for stopover visitors during the month of January 2020 were: Israel, United Arab Emirates, Jordan, Qatar, and Kuwait.

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

In January, arrivals from Asia,
Australasia, Africa and the Middle East were down for the month.

### Visitor Arrivals By Island

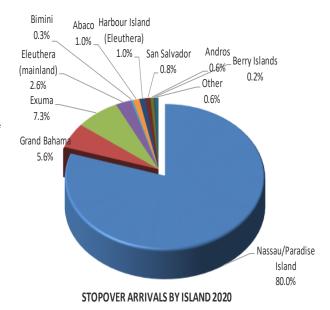
In January 2020, stopover arrivals decreased for most of the destinations in the Bahamas.

Stopover visitor arrivals were down for Nassau/Paradise Island (-1.2% to 97.7K visitors), Grand Bahama (-39.6% to 6.8K), Abaco (-82.0% to 1.3K), Berry Islands (-29.2% to 189 visitors), Bimini (-82.2% to 415 visitors), Mainland Eleuthera (-0.7% to 3.1K), Harbour Island in Eleuthera (-11.8% to 1.2K visitors), Exuma (-17.6% to 8.96K), and San Salvador (-51.4% to 970 visitors).

Stopovers were up for Andros (18.3% to 712 visitors) during the month

In January 2020, Nassau was the top island destination for visitors from all source markets, receiving **80.0**% of stopover arrivals followed by Exuma which had 7.3% and Grand Bahama with 5.6%.

Eleuthera as a whole including Harbour Island had 3.6% of the stopovers; Eleuthera mainland had 2.6% and Harbour Island had 1.0%. Abaco rounded out the top islands for stopovers, with **1.0%** of arrivals.



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### Travel Trends

In January 2020, the average length of stay of stopover visitors to The Bahamas was 6.3 nights with 58.4% staying 4 to 7 nights, 24.8% staying 2 to 3 nights, and 8.7% staying 8 to 14 nights.

Among the main source markets not including Africa (13.8 nts.) visitors from Latin America (8.5 nights), Europe (8.5 nights), and Australasia (8.1 nights) stayed the longest on average, compared to an average stay of 5.8 nights for US visitors.

During this period, 36.6K visitors, or 30.0% of visitors from all

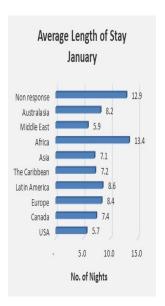
regions, were repeat visitors, with the largest proportion of repeat visitors from the main source markets coming from the Caribbean (i.e., 40.9% were repeat visitors), the US (i.e., 31.2%) and the lowest from Asia (9.1%).

During the period, 67% of all stopover visitors came to The Bahamas primarily for a vacation, with 10.0% coming for weddings and honeymoons, and 7.8% for business.

Approximately nine in ten (89%) of these visitors stayed in hotels,

2.6% in vacation rentals/ apartments or villas, 2.8% 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 42.2 years, with 52.0% of all visitors being between the ages of 25 and 54 years. As such, Millennials and Generation X accounted for 28.0% and 26.8% of visitors, respectively, followed by Baby Boomers (20.9%) and Post-Millennials (14.5%).



### Mode of Arrival

In January 2020, 91.3% of stopover visitors to The Bahamas arrived by commercial airline, 4.8% by private plane, 0.8% 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 upward 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 91.7%, 95.8% and 94.2%, respectively.

In addition, 87.5% of Europeans arrived by commercial airline, while 6.4% arrived by cruise ship; 6.4% of Latin Americans and 2.9% of arrivals from Asia arrived by cruise ship.

Eighty-four percent (84.1%) of Africans arrived by commercial airline, with 8.4% arriving by yacht and 2.6% by cruise ship. Meanwhile, 1.2% of Australasian visitors arrived by yacht.

### Airlift

In January 2020, the top ten commercial airlines were: American Airlines, Delta Air Lines, JetBlue, United Airlines, Air Canada, Southwest Airlines, Bahamasair, WestJet, Silver Airways and Sunwing Airlines.

For the US during the month, American Airlines delivered the most stopover visitors from the Midwest (8.5K), followed by Delta (7.7K) and United (3.4K). Delta delivered the most visitors from the Northeast (9.4K), followed by American (8.0K) and United Airlines (5.8K). Delta delivered the most visitors from the Southeast (4.1K), followed by American (3.0K) and Southwest Airlines (513 visitors). Jet-Blue delivered the most visitors from Florida (3.0K), followed by American (2.6K) and Bahamasair (1.7K).

For Canada during the month, Air Canada delivered the most stopover visitors (6.6K) followed by WestJet (4.5K), and Sunwing (2.4K).

For Europe during the month, American Airlines delivered the most stopover visitors (2.3K), followed by British Airways (1.8K) and Bahamasair (937 visitors).

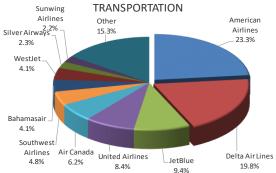
For Latin America during the month, American Airlines delivered the most stopover visitors (882 visitors), followed by Copa Airlines (306 visitors) and Bahamasair (219 visitors).

For the Caribbean during the month, American Airlines delivered the most stopover visitors (504 visitors), followed by Caribbean Airlines (243 visitors) and Jetblue (87 visitors).

For the Rest of the World during the month, American Airlines delivered the most stopover visitors (441 visitors), followed by Bahamasair (277 visitors) and Delta (234 visitors).

As of January, 10.0% of stopover visitors in January 2020, came to The Bahamas primarily for weddings and honeymoons.





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### Cruise Arrivals

In January 2020, cruise arrivals were up 11.3% for the month.

In January 2020, The Bahamas received 555.3K cruise arrivals by first port of entry, an increase of 11.3% relative to January 2019. This reflects increased cruise arrivals over 2019 to cruise destinations like Castaway Cay Abaco (up 10.9% to 35.8K), the Berry Islands i.e., Great and Little Stirrup Cays aka Coco Cay (up 215.1% to 128.2K), Bimini including Ocean Cay (up significantly to 25.3K), Princess Cay Eleuthera (up 15.1% to 39.1K), and Half Moon

Cay aka Little San Salvador (up 6.5% to 54.6K).

Comparatively, at 238.9K cruise visitors, Nassau / Paradise Island was down by 20.4%, and Grand Bahama Island by 15.6% to 33.4K visitors.

If one looked at Nassau/ Paradise Island in isolation by 1st, 2nd and 3rd port of entry, cruise arrivals to the island would be down by 4.9%.



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www.bahamas.com www.tourismtoday.com 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 - January [first port of entry only]

	2020	2019	2020/2019	2020	2019	2020/2019
	Air an	d Sea	% Chg Air/Sea	Air O	nly	% Chg Air
Nassau/Paradise Island	345,318	402,702	-14.2%	105,161	101,558	3.5%
Grand Bahama	38,138	48,834	-21.9%	2,809	5,782	-51.4%
Abaco	37,935	39,730	-4.5%	1,967	7,089	-72.3%
Andros	710	616	15.3%	694	603	15.1%
Berry Islands	129,369	41,595	211.0%	767	612	25.3%
Bimini	28,711	4,301	567.5%	1,138	965	17.9%
Cat Cay	599	573	4.5%	266	265	0.4%
Cat Island	101	68	48.5%	98	61	60.7%
Eleuthera	44,115	38,887	13.4%	4,910	4,850	1.2%
Exuma	5,800	6,147	-5.6%	5,719	6,075	-5.9%
Half Moon Cay	54,581	51,268	6.5%	-	-	0.0%
Inagua	80	87	-8.0%	56	33	69.7%
Long Island	134	91	47.3%	134	85	57.6%
San Salvador	1,609	1,982	-18.8%	1,589	1,934	-17.8%
Bahamas Overall	687,200	636,881	7.9%	125,308	129,912	-3.5%

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 - January (by Island & Mth.) [first port of entry only]

	Air and Sea Arrivals			Air	Arrivals O	nly
	2020	2019	%Chg 20/19	2020	2019	%Chg 20/19
January	687,200	636,881	7.9%	125,308	129,912	-3.5%
<b>Grand Total</b>	687,200	636,881	7.9%	125,308	129,912	-3.5%

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—January

















Europe

Canada







Visitor Concentration by Country (of residence)







































Latin America

Country (of residence)



Region	2020	2019	2018	2017	2016	2015	Total
USA	92,618			67,924			477,702
Canada	15,850			12,475			88,330
Europe	8,395	11,744	10,985	9,524	9,319	9,176	59,143
Latin America				3,660			21,931
The Caribbean				1,641			8,003
Asia				826			4,969
Australasia	398			491			3,136

AFGHANISTAN
 ALBANIA
 ALGERIA
 ANDORRA
 ANGOLA

Region

4,969 3,136 1,266 30 141 299 66 43 61 **640** 122,192 138,815 105,578 96,947 100,321 102,211 666,064

144

226 131 43

266 153 299

244 170 141

30

Non response

Visitor Type Stop Over

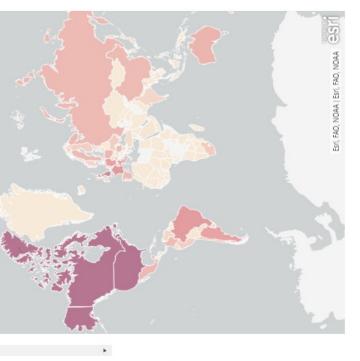
Middle East

Africa

☐ ANDROS
☐ BERRY ISLANDS

☐ ABACO☐ ACKLINS

Island Visited



# United States—Stopover Arrivals for January

Tourism Statistical Review



## Canada—Stopover Arrivals for January



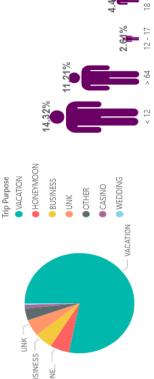




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Average Visits 1.0	
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general de la company de la co	Canada Territory	ory		
🕈 Clear filters	Province	2020	2019	City (Main
Arrival Year	Ontario	9,786	9,065	Toronto
2020	Quebec	2,548	2,545	Unknown
2019	Alberta	1,130	266	Montreal
▶□ 2018	British Columbia	1,037	1,063	Mississaud
2017	Unknown	411	554	Ottawa
Arrival Month	Manitoba	327	294	Calgary
oc.	Saskatchewan	192	262	Oakville
Foh	Nova Scotia	198	208	London
I ren	New Brunswick	101	93	Brampton
□ Apr	Newfoundland and	71	53	Hamilton
	Labrador			Markham
Arrival Quarter	Prince Edward Island	21	36	Winnipeg
Otr 1	Yukon	17	26	Vancouve
	Northwest Territories	2	7	Laval
	Nunavut	9	-	Burlingtor
Province	Total	15,850	15,204	Total
	~	l	^	~
✓ Alberta	Total Arrivals by Trip Purpose and Experience	urpose and	Experien	e e
British Columbia				Trip Purpose
■ Manitoba	UNK			VACATION
Island Visited	BUSINESS			HONEYMC
□ ABACO	HONE			BUSINESS
□ ACKLINS				OUNK
■ ANDROS				OTHER
■ BERRY ISLANDS				CASINO





Visitor Type Stop Over



42.1

17.11%

Total Arrivals by Age Group