

Tourism Statistical Review

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July 2021

Bahamas Ministry of Tourism & Aviation



In July 2021:

- Air & sea arrivals were significantly up 669% for the month and down 65.5% 2021 YTD compared to 2020.
- Stopover arrivals were up 478.9% for the month, and up 27.3% for 2021 YTD compared to the same period of 2020.
- Cruise visitor arrivals to the Bahamas began to return in February 2021. Cruise arrivals were down 65.5% by July 2021 YTD as service had just resumed to the destination during the month of February and most cruise lines had not yet returned in full force.

Total Visitor Arrivals

In July 2021, The Bahamas received **183.3K** foreign air and sea arrivals, a 669.4% increase relative to July 2020. Foreign air arrivals to The Bahamas as a whole increased by 771.4% and stood at **133.8K**. At the end of March 2020, The Bahamas had closed its borders to international traffic. In July 2020, The Bahamas officially re-opened to international traffic that were coming by private planes or private boats and remained open for July 2021 for these visitors and the ones that travelled by commercial flights.

Air arrivals to The Bahamas were up significantly between July 2020 and July 2021 as they climbed back up. This increase was seen in all the following islands: Abaco, Andros, Berry Islands, Bimini, Cat Cay, Cat Island, Eleuthera, Exuma, Grand Bahama, Inagua, Long Island, and Nassau/Paradise Island. San Salvador was the only island down in July 2021 because the major hotel for the island, Club Med

was still closed.

In July 2021, stopover arrivals to the Out islands were up significantly during the month compared to the same period of 2020 as visitors flocked to these islands. Stopover arrivals were up in Abaco, Andros, Berry Islands, Cat Island, Exuma, Eleuthera, Harbour Island, and Long Island.

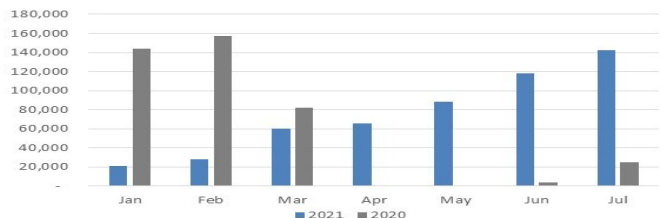
By the end of July YTD 2021, stopovers to San Salvador were down. All of the other islands experienced growth for the period.

At the end of March 2020, most

of the large hotels in Nassau/Paradise Island closed as a result of the border closures that took effect at that time and opened once again during the month of December 2020. These hotels remained open in July 2021. Hotel Occupancy for these large hotels in July 2021 was 69.9% although some properties had occupancies above 80% during the month.

Meanwhile, cruise arrivals which started again in February 2021 were still down by July 2021 YTD. By July 2021, a few of the cruise lines had resumed service to The Bahamas.

Stopover Arrivals by Month



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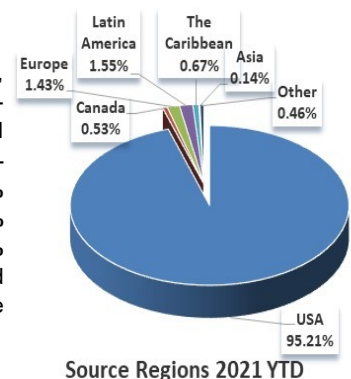
Stopover Arrivals (July YTD)

From January to July 2021, The Bahamas received **498.8K** stopovers (up 27.3% compared to the same period in 2020).

This reflects increases in stopovers from the United States (up 51.1%), Latin America (up 21.4%), Caribbean (up 9.4%), Africa (up 39.4%), and the Middle East (up 2.7%), and decreases in Canada (down 93.4%), Europe (down 69.0%), Asia (down 59.3%), Australasia (down 45.6%) for January

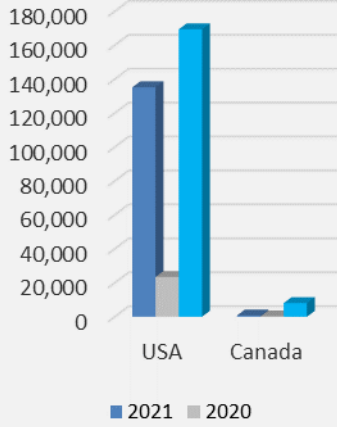
to July YTD.

For the year to date July YTD, **95% (498.8K)** of stopover visitors originated from the United States, while **1.43% (7.5K)** originated from Europe, **1.55% (8.1K)** from Latin America, **0.5% (2.8K)** from Canada, **0.7% (3.5K)** from the Caribbean, and **0.6% (3.2K)** from the rest of the world.



Source Regions 2021 YTD

July Stopover Arrivals



North American Arrivals

United States

In July 2021, **135.2k** stopover arrivals were received from the United States, an increase of 478.9% compared to July 2020.

In this regard, arrivals from all sales territories across the US increased, including: Florida (up 191.4%), the Northeast (up over 1000%), the Midwest (up 752.3%), and Southeast (up 607.4%).

In July 2021 YTD the top 10 producing states were Florida (up 113.3%), New York (up 17.9%), Texas (up 119.1%), California (up 101.5%), New Jersey (up 55.2%), Georgia (up

109.4%), North Carolina (up 74.2%), Pennsylvania (up 10.2%), Massachusetts (down 22.5%), and Virginia (up 35.0%).

The top ten DMAs during the period July YTD were: New York, Miami-Ft. Lauderdale, West Palm Beach-Ft.Pierce, Atlanta, Boston (Manchester), Washington DC (Hagerstown), Orlando-Daytona Bch-Melbrn, Los Angeles, Dallas-Ft. Worth, Tampa-St. Pete, and Philadelphia.

Canada

In July 2021, a small amount of stopover arrivals were received

from Canada but it was an increase of 389.9% compared to July 2020.

In July 2021 YTD, the top five producing provinces for stopovers were: Ontario (down 94.5%), Quebec (down 92.5%), Alberta (down 91.6%), British Columbia (down 92.1%), and Manitoba (down 87.9%).

The top ten producing cities YTD were: Toronto, Mississauga, Calgary, Winnipeg, Dorval, Westmount, Vaughan, Montreal, and Fort McMurray.

In July, European arrivals were up tremendously for the month but down 69.0% July YTD.

European Arrivals

In July 2021, 2.1K stopover arrivals were received from European countries and were up (584.8%) compared to July 2020.

In July 2021, stopover arrivals from all sales territories across Europe were up, including: the UK, covering Italy, Netherlands, and the Nordic region(+700.0%);

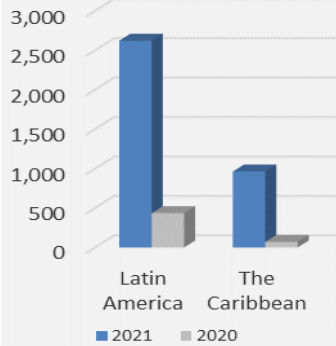
Germany, covering Central and Eastern Europe;(+435.6%) and France, covering Spain, Belgium, Portugal, Luxembourg, Monaco and Andorra(+620.0).

By the end of July 2021 YTD, the top ten producing countries for stopover visitors were: the United Kingdom (down 70.3%), France (down 82.2%), Germany

(down 76.1%), Italy (down 74.1%), Switzerland (down 47.6%), Spain (down 31.0%), Netherlands (down 40.0%), Russia (down 52.2%), Poland (down 78.3%) and Denmark (down 63.1%) .

The top producing cities were: London, Rome, Paris, Salford, Moscow, Delft, Madrid, Istanbul, Munich, and Liw.

July Stopover Arrivals



Latin American & Caribbean Arrivals

Latin America

In July 2021, 2.6K stopover arrivals were received from Latin American countries and increased substantially (502.5%) compared to July 2020.

By the end of July YTD the top ten producing countries for stopover visitors during the period were: Mexico (+122.3%), Brazil (+5.6%), Columbia (+40.8%), Argentina (-52.3%), Peru (+51.0%), Panama (+37.5%), Venezuela (+20.7%), Chile (-39.0%), Guatemala (+51.1%), and Ecuador (+3.1%).

The top ten producing cities were: Mexico City, Sao Paulo, Bogota, Lima, Panama City, Merida, Cancun, Buenos Aires, Rio de Janeiro, and Guatemala City.

The Caribbean

In July 2021, stopover arrivals received from Caribbean countries increased substantially (over 1000%) compared to June 2020.

By the end of July YTD, the top producing countries for stopover visitors from the Caribbean were:

Jamaica (29.8%), Puerto Rico (+136.8%), Turks and Caicos (+51.4%), Dominican Republic (+34.9%), Cuba (+79.4%), Bermuda (-9.4%), Cayman Islands (-56.5%), Trinidad and Tobago (-83.0%), Barbados (-64.2%), Guyana (+6.3%), and St. Kitts and Nevis (+76.0%).

The top ten producing cities were: Lucea, Kingston, Montego Bay, Guaynabo, Dorado, Spanish Town, Havana, Portmore, George Town and Caguas.

Arrivals from the Rest of the World

Asia

In July 2021, stopover arrivals received from Asian countries, increased compared to July 2020 (+295.8%). A miniscule amount of Asian visitors were received by July 2021 YTD, a -59.3% decrease from the same period in 2020.

The top producing countries for stopover visitors for July 2021 YTD were: Philippines (down 4.1%), India (down 46.8%), China (down 91.8%) Japan (down 79.8%), Hong Kong (down 54.3%), Singapore (down 58.1%), and Indonesia (down 70.0%).

The top producing cities were: Caba, Mumbai, Chas, Cebu City, Pune, Bengaluru, and Yerevan.

Australasia

In July 2021, a small amount of

stopover arrivals were received from Australasian countries, but it saw a 72.5% increase compared to July 2020.

The top producing countries for stopover visitors in July 2021 YTD declined compared to the same period of 2020, Australia (-54.0%) and New Zealand (-10.4%).

Africa

In July 2021, stopover arrivals received from African countries saw no change compared to July 2020.

The top producing countries for stopover visitors for July YTD 2021 were: South Africa (up 53.7%), Burkina Faso, Namibia, Zimbabwe, and Congo.

The top producing cities were: Cape Town (+74.5%), Durban (+53.2), Johannesburg (-11.8%), Pretoria (+66.7%), Port

Elizabeth (+163.6%), George (+257.1%), and Knysna (+69.2%).

Middle East

In July 2021, there was increase in stopover arrivals received from Middle Eastern countries (up over 1000%) compared to July 2020.

The top producing countries for stopover visitors for July 2021 YTD were: Israel (up 6.5%), United Arab Emirates (up 19.6%), and Qatar (up 66.7%).

The top producing cities were: Dubai (+44.7%), Doha (+53.8%), Jaffa (+200.%), Abu Dhabi (-41.7%), and Jerusalem (-7.7%).

In July, stopover arrivals from Asia, Australasia, and the Middle East were up for the month but still down for Asia and Australasia by 2021 YTD.

Visitor Arrivals By Island

In July 2021, stopovers to The Bahamas overall were up substantially (+478.9%) compared to July 2020. This was due in part by the desire for visitors to travel again and the relaxation of travel restrictions as more and more people got vaccinated.

During the month, stopover visitor arrivals were up substantially for Nassau/Paradise Island (+919.3%), Exuma (+261.4%), Bimini (+107.6%), Abaco (+243.5%), Grand Bahama (225.2%), Mainland (+177.1%), and Harbour Island Eleuthera (+117.4%) the Berry Islands (+85.4%) and Andros (+9.2%).

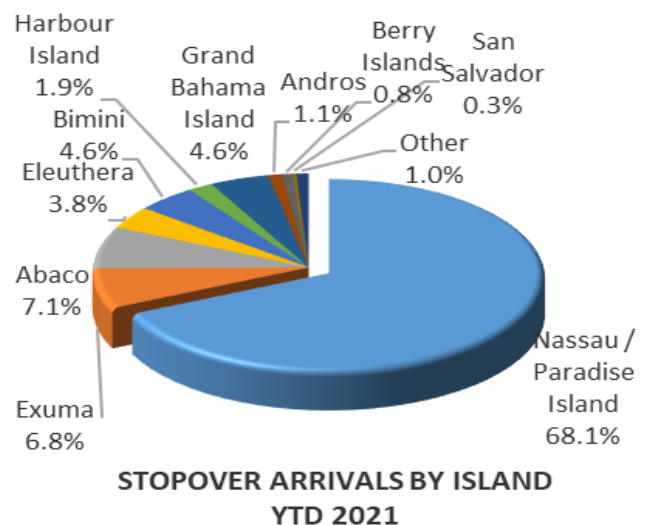
From January to July 2021 the following islands experienced increases in stopover visitors: Nassau/Paradise Island received **356.8K** stopover visitors, an in-

crease of 14.4%. Grand Bahama (19.1% to 23.9K), Abaco (+176.9% to 37.2K), Andros (+60.1% to 5.7K), Berry Islands (+209.5% to 4.1K), Bimini (+126.1% to 24.1K), Mainland Eleuthera (+41.8% to 20.0K), Harbour Island Eleuthera (+74.7% to 10.2K), and Exuma (+51.0% to 35.4K stopovers).

During the same period, 2021 YTD, other islands suffered declines in stopovers compared to the same period in 2020. During the period, stopover declines were noted on San Salvador (-66.9% to 1.5K).

In July YTD 2021, Nassau was the top island destination for visitors from all source markets, receiving **68.1%** of stopover arrivals, followed by Abaco (7.1%), Exuma (6.8%), Total Eleuthera

5.7% (i.e. mainland Eleuthera 3.8% and Harbour Island 1.9% of the market share of stopovers), Bimini



Travel Trends

From January to July 2021, the average length of stay of stopover visitors to The Bahamas was 7.1 nights with 58.3% staying 4 to 7 nights, 18.2% staying 2 to 3 nights, 12.5% staying 8 to 14 nights and 3.2% staying 22-90 nights.

Among the main source markets not including Africa (29.7 nts.) visitors from Australasia (27.8 nts.), Asia (18.7 nts.), Europe (16.0 nts.), the Caribbean (10.2 nts.), and Latin America (9.3 nts.), stayed the longest on average, compared to an average stay of 6.8 nights for US visitors.

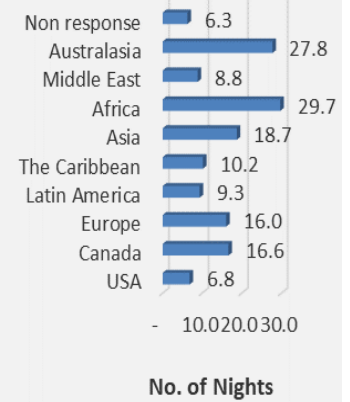
During this period, 48.0% of visitors from all regions, were repeat visitors, with the largest proportion of repeat visitors from the main source markets coming from Africa (80.2%), Australasia (64.1%), Canada (63.8%), USA (48.0%), Europe (46.4%) and the Caribbean (46.1%). The region with the lowest repeat visitor rate in the period was The Middle East (27.4%).

During the period, 70.1% of all stopover visitors came to The Bahamas primarily for a vacation, with 12.6% coming for weddings and honeymoons, and 2.4% for business.

Roughly nine in ten (86.3%) visitors stayed in hotels, 4.3% in vacation rentals/apartments or villas, 3.4% in timeshare properties, 2.3% with friends and relatives, and 1.5% on private boats.

The average age of stopover visitors during this period was 40.3 years, with 42.3% of all visitors being between the ages of 25 and 54 years. As such, Millennials and Generation X accounted for 21.5% and 22.9% of visitors, respectively, followed by Post-Millennials (19.7%) and Baby Boomers (14.0%).

Average Length of Stay YTD



As of July YTD

2021, 12.6% of stopover visitors came to The Bahamas primarily for weddings and honeymoons.

Mode of Arrival

From January to July 2021 YTD, 68.5% of stopover visitors to The Bahamas arrived by commercial airline, 21.3% by private plane, 6.0% by private boat/yacht, and 1.1% by cruise ship. This generally reflects the travel patterns of US visitors.

For other source regions, the proportions of stopover visitors arriving by commercial airline, private plane, private boat and cruise ship varied by degree for each market.

For instance, the top transportation modes used by visitors to come to The Bahamas from:

Canada were commercial airlines (60.5%), private planes (27.6%) and private yachts (7.7%); Europe were commercial airlines (61.4%), private planes (23.6%) and private yachts (9.6%); Latin America were commercial airlines (57.9%), private planes (31.3%) and yachts/boats (5.2%); The Caribbean were commercial airlines (64.8%), private planes (24.9%) and private yacht/boat (3.3%); Africa were commercial airlines (38.9%), private yacht/boat (39.8%), and private planes

(8.4%); Australasia were commercial airlines (45.9%), private yacht/boat (29.1%), and private plane (13.2%); Asia were commercial airlines (58.1%), private planes (23.1%) and yachts/boats (10.3%).

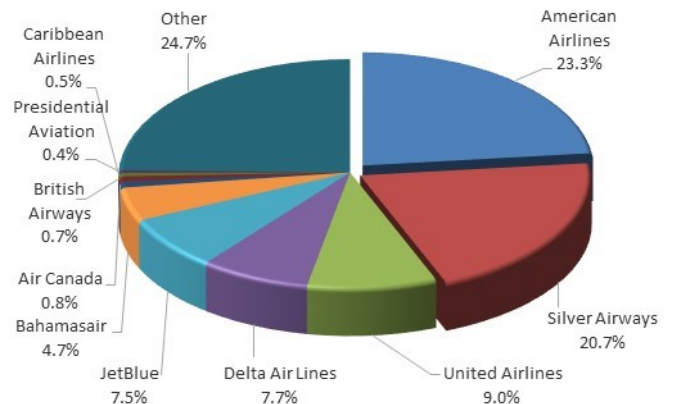
Airlift

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

For the US YTD, American Airlines delivered the most stopover visitors from the Midwest (45.4K), followed by Silver Airways (25.0K), and United Airlines (18.0K). American Airlines delivered the most visitors from the Northeast (30.1K), followed by Silver Airways (29.7K) and United Airlines (24.8K). American Airlines delivered the most visitors from the Southeast (19.4K), followed by Silver Airways (18.0K) and Delta (14.4K). Of the commercial airlines, Silver Airways delivered the most visitors from Florida (26.5K), followed by American Airlines (17.2K) and Bahamasair (15.1k).

For Canada YTD, Air Canada delivered the most stopover visitors, followed by Silver Airways and American Airlines. For Europe YTD, British Airways delivered the most stopover visitors followed by Silver Airways and American Airlines. For Latin America YTD, American Airlines delivered the most stopover visitors, followed by Silver Airlines and COPA Airlines. For the Caribbean YTD, Caribbean Airlines delivered the most stopover visitors, followed by Silver Airways, and American Airlines.

COMMERCIAL AIRLINES AND OTHER TRANSPORTATION YTD



- In February 2021, the Balearia began to bring cruise visitors to The Bahamas again and by July 2021 other cruise lines like RCCL, Crystal Cruises, Carnival Cruises, Celebrity Cruises and others had resumed service to the destination.

Cruise Arrivals

In June 2021, The Bahamas received cruise arrivals on the Balearia Caribbean which had resumed service to Bimini and Grand Bahama in February 2021. In addition, Royal Caribbean Cruise Lines resumed service in The Bahamas on June 12, 2021 (Cruise and Maritime Dept. Bahamas Ministry of Tourism, 2021). Moreover, RCCL began homeporting with a few of their ships in The Bahamas during the month of June 2021.

The Bahamas did not receive

any cruise arrivals in April, May, June, August, September, October, November, December 2020 or January 2021 as the Cruise and Ferry Industry had not yet resumed service to The Bahamas.

Cruise arrivals (first port of entry) by July YTD 2021 were still down significantly by 97.0% but Royal Caribbean Cruise lines, Carnival Cruises, and Celebrity Cruises had once again resumed service to The Bahamas after more than a year of absence due

to the global pandemic, and other cruise lines were also scheduled to resume service too in the upcoming months. The Coco Cay port in The Bahamas was now open again.

In addition, Crystal Cruises began service to The Bahamas and made stops on many islands like Nassau, Grand Bahama, Bimini, Exuma, Long Island, and San Salvador.

Most of the cruise ports in The Bahamas had not yet opened for service in the early months of 2021 but slowly began to do so by July 2021.



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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 - July [first port of entry only]

	2021	2020	2021/2020	2021	2020	2021/2020
	Air and Sea		% Chg Air/Sea	Air Only		% Chg Air
Nassau/Paradise Island	118,797	7,899	1403.9%	101,524	7,199	1310.3%
Grand Bahama	11,638	1,854	527.7%	2,949	518	469.3%
Abaco	7,355	1,599	360.0%	6,507	833	681.2%
Andros	1,354	682	98.5%	1,345	670	100.7%
Berry Islands	7,340	2,039	260.0%	1,119	902	24.1%
Bimini	9,562	4,546	110.3%	1,397	634	120.3%
Cat Cay	912	852	7.0%	480	290	65.5%
Cat Island	133	113	17.7%	133	113	17.7%
Eleuthera	9,052	2,856	216.9%	8,886	2,846	212.2%
Exuma	9,257	1,175	687.8%	9,221	1,162	693.5%
Half Moon Cay	5,395	-	100.0%	-	-	0.0%
Inagua	83	48	72.9%	77	33	133.3%
Long Island	169	108	56.5%	152	106	43.4%
San Salvador	2,223	49	4436.7%	21	49	-57.1%
Bahamas Overall	183,270	23,820	669.4%	133,811	15,355	771.4%

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 - July YTD [first port of entry only]

	2021	2020	2021/2020	2021	2020	2021/2020
	Air and Sea		% Chg Air/Sea	Air Only		% Chg Air
Nassau/Paradise Island	367,274	883,739	-58.4%	342,976	295,997	15.9%
Grand Bahama	30,291	109,690	-72.4%	11,210	9,397	19.3%
Abaco	34,283	77,037	-55.5%	30,144	6,849	340.1%
Andros	7,624	2,917	161.4%	7,574	2,856	165.2%
Berry Islands	20,138	328,746	-93.9%	7,112	3,494	103.5%
Bimini	39,531	77,506	-49.0%	6,988	4,095	70.6%
Cat Cay	4,857	2,726	78.2%	2,377	1,179	101.6%
Cat Island	1,214	420	189.0%	1,210	397	204.8%
Eleuthera	44,440	103,750	-57.2%	43,653	19,056	129.1%
Exuma	36,484	17,690	106.2%	35,928	17,422	106.2%
Half Moon Cay	5,395	120,417	-95.5%	-	-	0.0%
Inagua	1,233	413	198.5%	414	158	162.0%
Long Island	1,597	674	136.9%	1,494	617	142.1%
San Salvador	2,562	3,668	-30.2%	275	3,582	-92.3%
Bahamas Overall	596,923	1,729,393	-65.5%	491,355	365,099	34.6%


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		
	2021	2020	%Chg 21/20	2021	2020	%Chg 21/20
January	23,619	687,200	-96.6%	20,792	125,308	-83.4%
February	29,510	712,257	-95.9%	25,719	147,044	-82.5%
March	62,765	302,118	-79.2%	56,371	75,656	-25.5%
April	68,791	43	159879.1%	60,305	11	548127.3%
May	93,876	20	469280.0%	81,168	20	405740.0%
June	135,092	3,935	3333.1%	113,189	1,705	6538.7%
July	183,270	23,820	669.4%	133,811	15,355	771.4%
Grand Total	596,923	1,729,393	-65.5%	491,355	365,099	34.6%

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—July



Regions

Clear filters

Arrival Year

- 2021
- 2020
- 2019
- 2018
- 2017

Arrival Month

- Mar
- Apr
- May
- Jun
- Jul
- Aug

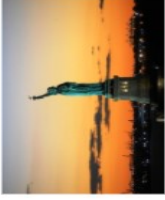
Country (of residence)

- AFGHANISTAN
- ALBANIA
- ALGERIA
- ANDORRA
- ANGOLA
- Island Visited
- ABACO
- ACKLINS
- ANDROS
- BERRY ISLANDS


Visitor Type

- Stop Over


Region




USA




Canada




Europe



Latin America



The Caribbean



Asia

Total Arrivals

0.88M

Return Visits

429K

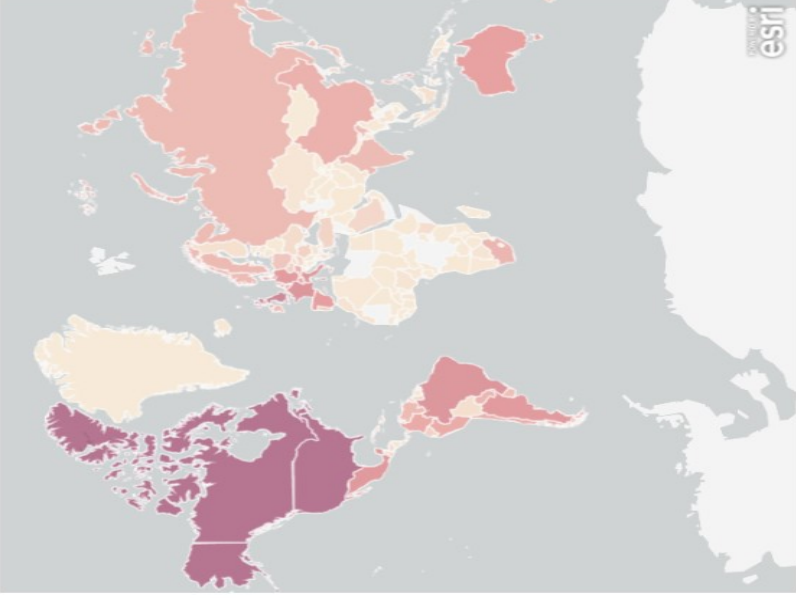
Average Visits

1.1

Average Stay (nights)

6.4


Visitor Concentration by Country (of residence)



Total Arrivals by Country (of residence)

Region	2021	2020	2019	2018	2017	2016	Total
USA	135,161	23,389	169,331	147,463	140,163	144,973	760,480
Europe	2,116	309	10,983	9,677	10,935	10,795	44,815
Canada	725	148	7,974	6,775	7,301	8,686	31,609
Latin America	2,621	435	5,234	3,862	5,433	5,607	23,192
The Caribbean	963	71	3,074	2,042	2,350	2,810	11,310
Asia	190	48	1,125	826	1,077	768	4,034
Australasia	69	40	477	420	824	476	2,306
Africa	108	108	414	231	512	268	1,641
Middle East	173	2	276	265	252	349	1,317
Non response	4	1	83	104	262	127	581
Total	142,130	24,551	198,971	171,665	169,109	174,859	881,285

All Stopover Arrivals—July YTD



Regions

Clear filters

Arrival Year

- 2021
- 2020
- 2019
- 2018
- 2017

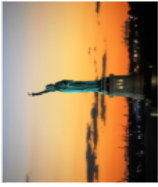
Arrival Month

- Mar
- Apr
- May
- Jun
- Jul


Country (of residence)

- AFGHANISTAN
- ALBANIA
- ALGERIA
- ANDORRA
- ANGOLA
- Island Visited
- ABACO
- ACKLINS
- ANDROS
- BERRY ISLANDS


Region




USA




Canada




Europe



Latin America



The Caribbean

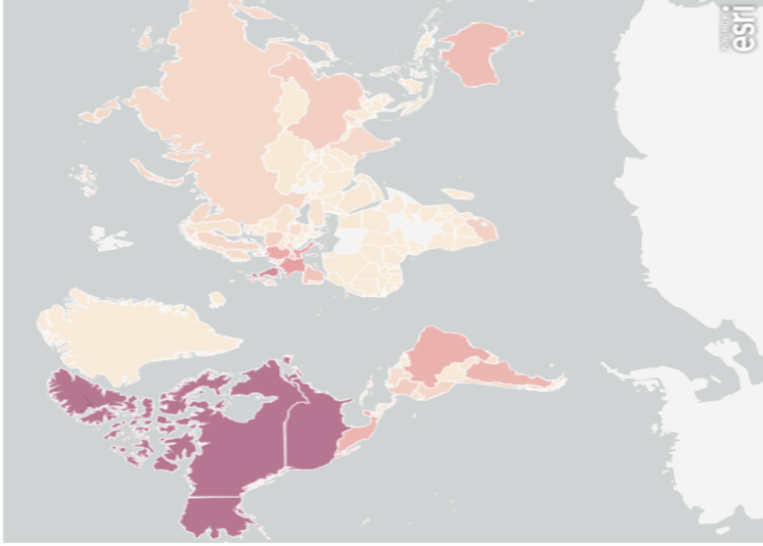


Asia

Total Arrivals by Country (of residence)

Region	2021	2020	2019	2018	2017	2016
USA	498,763	330,190	1,048,405	844,337	784,642	817,889
Canada	2,799	42,182	90,986	80,791	73,958	86,002
Europe	7,468	24,075	76,874	75,793	69,870	67,644
Latin America	8,118	6,685	24,893	24,491	22,613	23,398
The Caribbean	3,532	3,229	13,355	13,442	12,279	13,731
Asia	750	1,843	7,984	8,321	6,165	4,777
Australasia	579	1,065	3,296	3,141	3,846	3,522
Africa	1,225	879	2,176	1,837	1,867	1,689
Middle East	413	402	1,283	1,614	1,211	1,157
Non response	188	800	739	1,512	1,107	520
Total	523,835	411,350	1,269,991	1,055,279	977,558	1,020,329

Visitor Concentration by Country (of residence)



Total Arrivals

5.26M

Return Visits

3M

Average Visits

1.3

Average Stay (nights)

6.8