

Tourism Statistical Review

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March 2020 (Revised)

Bahamas Ministry of Tourism & Aviation



In March 2020:

- Air & sea arrivals were down 59.7% for the month and 14.7% 2020 YTD.
- Stopover arrivals were down 69.7% for the month and 34.5% for 2020 YTD.
- Cruise arrivals were down 59.6% for the month of March and down 10.0% for 2020 YTD.

Total Visitor Arrivals

In March 2020, The Bahamas received **302.1K** foreign air and sea arrivals, a decline of **59.7%** relative to March 2019, but air arrivals to the Bahamas as a whole declined by **62.5%** and stood at **75.7K**.

Air arrivals during the month were down in all of the major islands: Nassau/Paradise Island (-60.2% to 60.9K), Grand Bahama (-74.0% to 1.9K), Abaco (-90.1% to 1.5K), Andros (-58.0% to 480), Berry Islands (-46.1% to 724), Bimini (-58.7% to 978), Cat Cay (-51.7% to 226), Cat Island (-46.8%), Eleuthera (down significantly), Exuma (-58.7% to 3.5K), Inagua (-18.6%), Long Island (-30.1%), and San Salvador (-61.7% to 690).

In March 2020, stopover arrivals were **66.8K**, a 69.7% decrease compared to March 2019. This reflects decreased stopover arrivals to all major island destinations in the Bahamas like Abaco (-97.5%), Andros (-77.4%), Berry Islands (-

57.8%), Bimini (-77.1%), Grand Bahama (-89.6%), Mainland Eleuthera (-87.1%), Harbour Island (-85.6%), and San Salvador (-94.8%) and decreased arrivals from most source markets.

By the end of March YTD, stopovers from most of the islands in the Bahamas had been influenced by the month of March and were down for the period.

In March 2020 YTD, average hotel occupancy for large hotels on Nassau/Paradise Island was

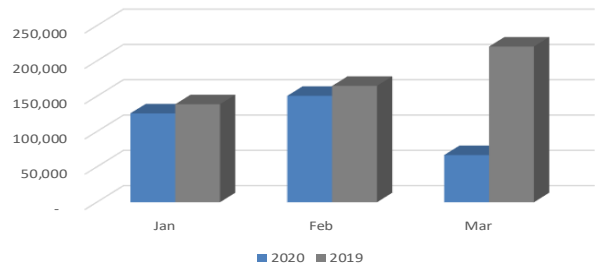
63.2%, down 14.8% percentage pts. from 2019, while average daily room rates were down 9.3% to \$273.57 contributing to a 28.0% decline in hotel room revenues.

Meanwhile, cruise arrivals were down 10% in March 2020 YTD to 1.3M.

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Stopover Arrivals By Month



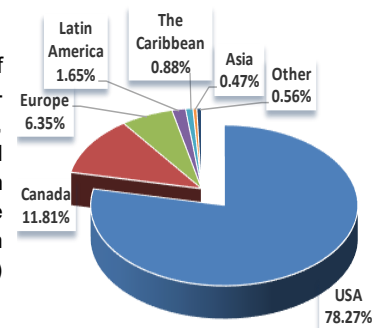
Stopover Arrivals (March YTD)

From January to March 2020, The Bahamas received **343.4K** stopovers, (down 34.5% compared to the same period in 2019).

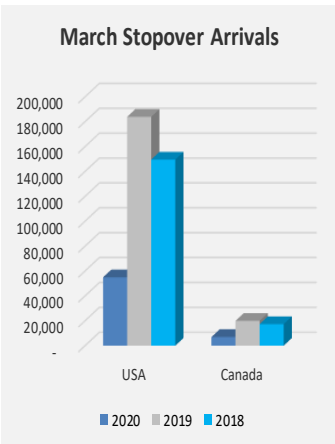
This reflects decreases in stopovers from the United States (down 35.6%), Canada (down 22.2%), Europe (down 37.3%), Latin America (down 35.5%), Caribbean (down 27.4%), Asia (down 59.1%), Africa (down 34.2%), Australasia (down 33.1%) and the Middle East (down 16.0%) for

January to March YTD.

For the year to date, **78.3%** of stopover visitors (**268.8K**) originated from the United States, while **11.8%** (**40.6K**) originated from Canada, **6.4%** (**21.8K**) from Europe, **0.9%** (**3.0K**) from the Caribbean, **1.65%** (**5.7K**) from Latin America, and **1.0%** (**3.6K**) from the rest of the world.



Source Regions 2020 YTD



North American Arrivals

United States

In March 2020, **54.9K** stopover arrivals were received from the United States, a decrease of **70.1%**, compared to March 2019.

In this regard, arrivals from all sales territories across the US declined, including: the Northeast (down 63.6% to 21.4K), the Midwest (down 70.9% to 17.2K), the Southeast (down 70.1% to 6.5K), and Florida (down 79.1% to 7.0K).

In March 2020 YTD the top 10 producing states were New York (down 25.6%), Florida (down 48.3%), Massachusetts (down

19.6%), New Jersey (down 26.4%), Texas (down 38.8%), Pennsylvania (down 29.1%), California (down 35.3%) Georgia (down 37.5%), Illinois (down 43.5%), and Virginia (down 28.8%).

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

Canada

In March 2020, **6.99K** stopover arrivals were received from Can-

ada, a decrease of **65.1%**, compared to March 2019.

In March 2020 YTD, the top five producing provinces for stopovers were: Ontario (down 23.4%), Quebec (down 14.4%), Alberta (down 18.7%), British Columbia (down 21.1%), and Manitoba (down 17.7%).

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

In March,

European arrivals were down 69.1% for the month and 37.3% YTD.

European Arrivals

In March 2020, **3.3K** stop-over arrivals were received from European countries, a decrease of **69.1%**, compared to March 2019.

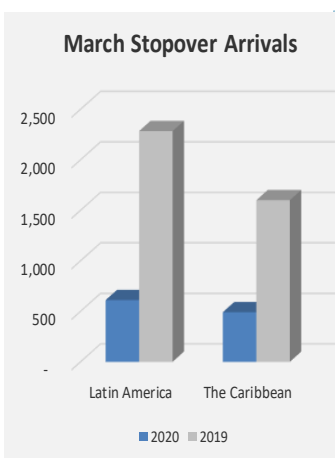
In March 2020, stopover arrivals from all sales territories across Europe were down, including: the UK, covering Italy, Netherlands, and the Nordic region

(down by 66.4%); France, covering Spain, Belgium, Portugal, Luxembourg, Monaco and Andorra (down 78.5%); and Germany, covering Central and Eastern Europe (down 66.6%).

By the end of March 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, Munich, Milan, Hamburg, Stockholm, Vienna and Constanta.



Latin American & Caribbean Arrivals

Latin America

In March 2020, **611** stopover arrivals were received from Latin American countries, a decrease of **73.2%** compared to March 2019.

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

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

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

The Caribbean

In March 2020, **491** stopover arrivals were received from Caribbean countries, a decrease of **69.3%**, compared to March 2019.

By the end of March 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, Cuba, and Haiti.

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

Arrivals from the Rest of the World

Asia

In March 2020, **171** stopover arrivals were received from Asian countries, a decrease of **83.4%** compared to March 2019. **1.6K** Asian visitors were received by March 2020 YTD, a 59.1% decrease from the same period in 2019.

The top ten producing countries for stopover visitors for March 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, Bengaluru and Baku.

Australasia

In March 2020, **172** stopover arrivals were received from

Australasian countries, a decrease of **57.3%** compared to March 2019.

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

Africa

In March 2020, **90** stopover arrivals were received from African countries, a decrease of **76.1%** compared to March 2019.

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

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

Middle East

In March 2020, **46** stopover arrivals were received from Middle Eastern countries, a decrease of **64.6%** compared to March 2019.

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

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

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

Visitor Arrivals By Island

In March 2020, stopover arrivals decreased for all of the destinations in the Bahamas.

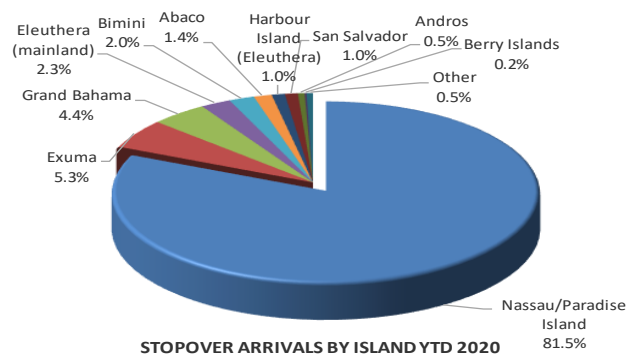
During the month, stopover visitor arrivals were down for the following islands: Nassau/Paradise Island (-63.2% to 58.7K), Grand Bahama (-89.6% to 1.5K), Abaco (-97.5%), Berry Islands (-57.8% to 152 visitors), Bimini (-77.1% to 1.4K), Mainland Eleuthera (-87.1%), Harbour Island in Eleuthera (-85.6%), Exuma (-74.3% to 2.8K), and San Salvador (-94.8%).

From January to March 2020, compared to the same period in 2019, Nassau received **279.9K** stopover visitors, a decrease of 26.7%. During the period stopover declines were also noted on other Islands like Abaco (down 85.4% to 4.8K), Bimini (down

48.5% to 6.7K), Cat Cay (down 47.6% to 162 visitors), Cat Island (down 51.1% to 414 visitors), Crooked Island (down 52.3% to 53), Exuma (down 31% to 18.1K), Harbour Island Eleuthera (down 44.3% to 3.5K) and San Salvador (down 42.7% to 3.4K).

In March YTD 2020, Nassau was the top island destination for visitors from all source markets, receiving **81.5%** of stopover arrivals, followed by Exuma which had 5.3% and Grand Bahama with 4.4%.

Eleuthera as a whole including Harbour Island had **3.3%** of the market share of stopovers: i.e., Eleuthera mainland with **2.3%** and Harbour Island with **1.0%**. The next biggest destination for stopovers to the Bahamas was Bimini with **2.0%** of the visitors. Abaco



rounded out the top islands for stopovers, with **1.4%** of arrivals.

Travel Trends

From January to March 2020, the average length of stay of stopover visitors to The Bahamas was 6.3 nights with 60.7% staying 4 to 7 nights, 22.3% staying 2 to 3 nights, and 9.0% staying 8 to 14 nights.

Among the main source markets not including Africa (21.3 nts.) visitors from Latin America (8.5 nights), Europe (8.9 nights), and Australasia (12.3 nights) stayed the longest on average, compared to an average stay of 5.8 nights for US visitors.

During this period, 139.7K visi-

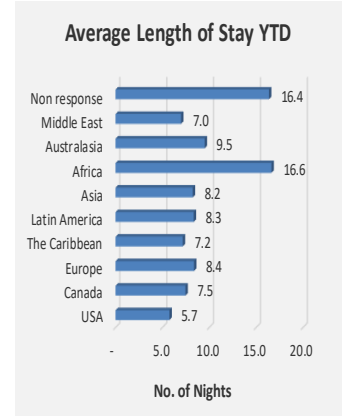
tors, or 40.7% of visitors from all regions, were repeat visitors, with the largest proportion of repeat visitors from the main source markets coming from the Caribbean (i.e., 52.9% were repeat visitors), Africa (i.e. 49.4%), the US (i.e., 41.8%) and the lowest from Asia (22.2%).

During the period, 69.1% of all stopover visitors came to The Bahamas primarily for a vacation, with 9.9% coming for weddings and honeymoons, and 7.1% for business.

Roughly nine in ten (87%) of

these visitors stayed in hotels, 2.4% in vacation rentals/apartments or villas, 2.9% 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 41.3 years, with 49.5% of all visitors being between the ages of 25 and 54 years. As such, Generation X and Millennials accounted for 26.4% and 25.7% of visitors, respectively, followed by Baby Boomers (19.9%) and Post-Millennials (17.7%).



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

Mode of Arrival

From January to March 2020, 80.8% of stopover visitors to The Bahamas arrived by commercial airline, 14.7% by private plane, 1.7% by private boat/yacht, and 0.8% 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 (94.8%), private planes (3.5%) and cruise ships (0.7%); Europe were commercial airlines (86.9%), private planes (5.8%) and cruise ships (4.2%); Latin America were commercial airlines (85.2%), private planes (7.5%) and cruise ships (4.3%). The Caribbean were commercial airlines (90.0%), private planes (6.2%) and cruise ships (1.4%). Africa were commercial airlines (67.4%), private yacht/boat (18.0%), and cruise ships (4.3%). Australasia were com-

mercial airlines (82.1%), private yacht/boat (6.7%), and private plane (4.5%). Asia were commercial airlines (89.0%), private planes (4.4%) and cruise ships (3.9%).

Airlift

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

For the US YTD, American Airlines delivered the most stopover visitors from the Midwest (25.3K), followed by Delta (19.7K) and United (9.7K). Delta delivered the most visitors from the Northeast (25.7K), followed by American (25.0K) and Jetblue (22.1K). Delta delivered the most visitors from the Southeast (11.8K), followed by American (8.7K) and Southwest Airlines (1.4K). JetBlue delivered the most visitors from Florida (7.7K), followed by American (6.6K) and Bahamasair (4.8K).

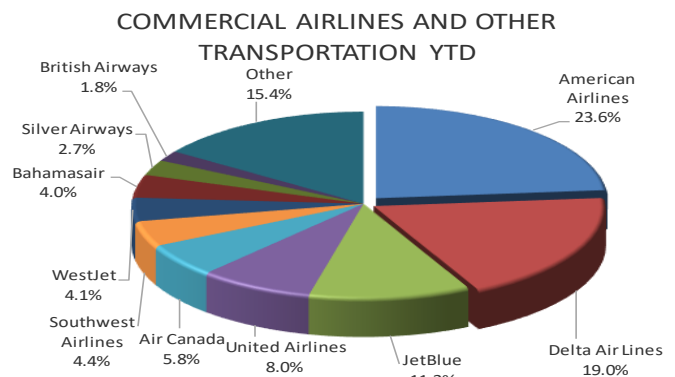
For Canada YTD, Air Canada delivered the most stopover visitors (16.7K) followed by

WestJet (12.4K), and Sunwing (4.9K).

For Europe YTD, American Airlines delivered the most stopover visitors (5.8K), followed by British Airways (5.1K) and Bahamasair (2.4K).

For Latin America YTD, American Airlines delivered the most stopover visitors (2.2K), followed by Copa Airlines (768 visitors) and Bahamasair (560 visitors).

For the Caribbean YTD, American Airlines delivered the most stopover visitors (940 visitors), followed by Caribbean Airlines (733 visitors) and Bahamasair (258 visitors).



Cruise Arrivals

In March 2020, cruise arrivals were down 59.6% for the month, and 10.0% YTD.

In March 2020, The Bahamas received 214.0K cruise arrivals by first port of entry, a decrease of 59.6% relative to March 2019.

During the month of March 2020, Bimini which includes Ocean Cay (up significantly to 10.3K) was the only island that experienced an increase in cruise arrivals.

Comparatively at 99.95K cruise visitors, Nassau / Paradise Island was down by 68.9%. Cruise arrivals to all of the fol-

lowing islands were also down during the month of March: Grand Bahama (down 66.6% to 17.4K), Castaway Cay Abaco (down 33.5% to 11.8K), Berry Islands (down 3.9% to 49.3K), Princess Cay Eleuthera (down 69.6% to 13.4K) and Half Moon Cay (down 71.2% to 11.8K) (first port of entry).

Meanwhile, cruise arrivals (first port of entry) March YTD 2020 decreased at a slower pace by 10.0% and stood at 1.3M. Most of the cruise ports experienced

declines except the Berry Islands and Bimini for the quarter. Cruise arrivals to the Berry Islands (Great and Little Stirrup Cays) increased significantly by 124.8% to 322.7K during the period. Cruise arrivals to Bimini (namely the cruise port of Ocean Cay) also increased significantly during the period to 63.1K; this port was not open in 1st qtr. 2019.



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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 - March [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	168,239	475,630	-64.6%	60,904	152,968	-60.2%
Grand Bahama	21,903	66,073	-66.9%	1,945	7,488	-74.0%
Abaco	13,413	33,960	-60.5%	1,514	15,324	-90.1%
Andros	493	1,148	-57.1%	480	1,142	-58.0%
Berry Islands	50,462	53,676	-6.0%	724	1,344	-46.1%
Bimini	12,662	11,366	11.4%	978	2,367	-58.7%
Cat Cay	501	1,038	-51.7%	226	468	-51.7%
Cat Island	94	139	-32.4%	74	139	-46.8%
Eleuthera	17,903	53,994	-66.8%	4,353	9,632	-54.8%
Exuma	3,598	8,724	-58.8%	3,548	8,599	-58.7%
Half Moon Cay	11,829	41,084	-71.2%	-	-	0.0%
Inagua	138	111	24.3%	48	59	-18.6%
Long Island	174	267	-34.8%	172	246	-30.1%
San Salvador	709	1,834	-61.3%	690	1,802	-61.7%
Bahamas Overall	302,118	749,044	-59.7%	75,656	201,578	-62.5%

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 - March 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	874,745	1,237,560	-29.3%	288,284	369,926	-22.1%
Grand Bahama	106,734	162,663	-34.4%	8,247	20,065	-58.9%
Abaco	75,075	117,875	-36.3%	5,721	32,408	-82.3%
Andros	2,025	2,570	-21.2%	1,982	2,538	-21.9%
Berry Islands	326,367	148,083	120.4%	2,410	2,731	-11.8%
Bimini	72,332	23,279	210.7%	3,431	5,156	-33.5%
Cat Cay	1,672	2,354	-29.0%	846	1,011	-16.3%
Cat Island	294	304	-3.3%	271	292	-7.2%
Eleuthera	100,640	144,550	-30.4%	16,028	20,950	-23.5%
Exuma	16,358	21,691	-24.6%	16,137	21,434	-24.7%
Half Moon Cay	120,417	126,924	-5.1%	-	-	0.0%
Inagua	287	321	-10.6%	125	154	-18.8%
Long Island	501	484	3.5%	461	445	3.6%
San Salvador	3,570	5,638	-36.7%	3,507	5,516	-36.4%
Bahamas Overall	1,701,017	1,994,296	-14.7%	347,450	482,626	-28.0%

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

The COVID-19 Global Pandemic began in December 2019 and by March 2020 had caused the closure of international borders around the world and had heavily impacted global travel.

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%
March	302,118	749,044	-59.7%	75,656	201,578	-62.5%
Grand Total	1,701,017	1,994,296	-14.7%	347,450	482,626	-28.0%

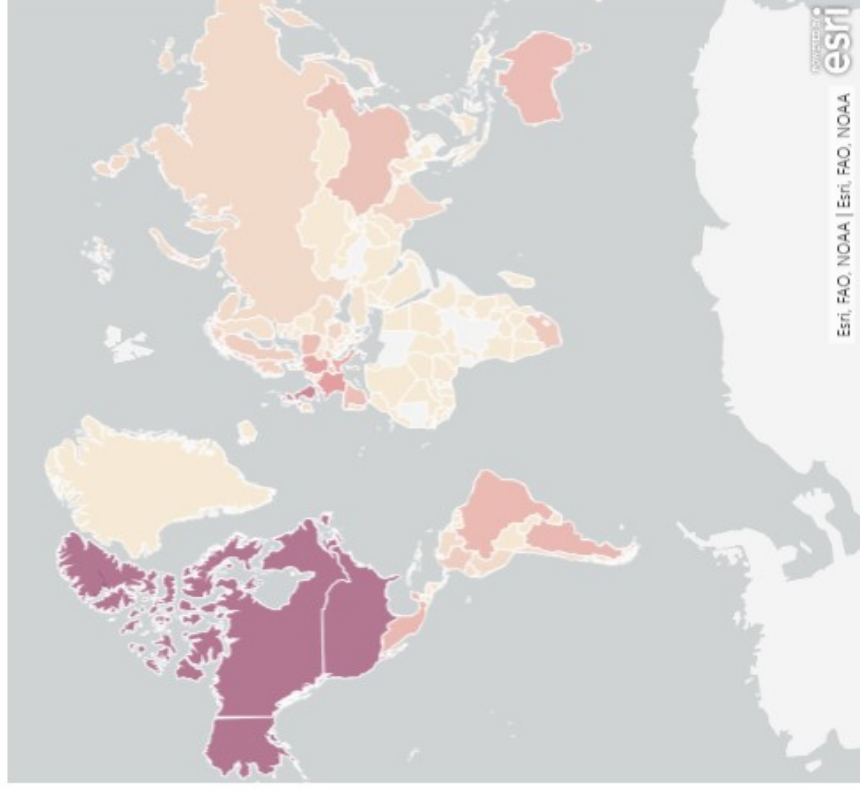
Source: Immigration, Customs various ports of entry in the Bahamas, and Port Authorities. Research and Statistics Dept. Ministry of Tourism

All numbers are subject to revision

All Stopover Arrivals—March



Visitor Concentration by Country (of residence)



Total Arrivals by Country (of residence)

Region	2020	2019	2018	2017	2016	Total
USA	54,980	183,943	149,583	125,743	147,100	661,349
Canada	6,991	20,041	17,328	16,251	17,525	78,136
Europe	3,276	10,611	12,673	10,287	11,967	48,814
Latin America	611	2,284	3,279	1,927	2,993	11,094
The Caribbean	491	1,600	2,519	1,113	1,579	7,302
Asia	171	1,032	1,301	803	675	3,982
Australasia	172	403	414	411	484	1,884
Africa	90	376	283	241	331	1,321
Middle East	46	130	203	136	97	612
Non response	9	106	287	134	68	604
Total	66,837	220,526	187,870	157,046	182,819	815,098

All Stopover Arrivals—March YTD

Region



USA



Canada



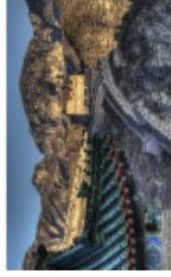
Europe



Latin America

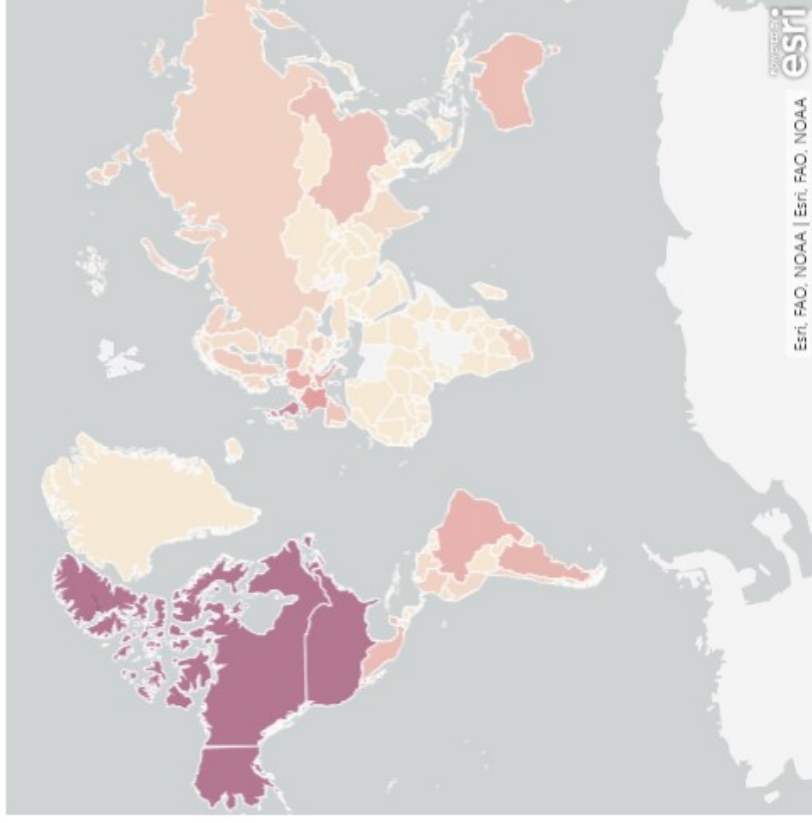


The Caribbean



Asia

Visitor Concentration by Country (of residence)



Total Arrivals by Country (of residence)

Region	2020	2019	2018	2017	2016	Total
USA	268,809	417,245	321,190	279,444	309,263	1,595,951
Canada	40,570	52,171	46,213	42,866	48,759	230,579
Europe	21,821	34,787	36,302	29,280	30,149	152,339
Latin America	5,666	8,788	11,717	8,418	9,223	43,812
The Caribbean	3,021	4,162	5,428	4,332	4,578	21,521
Asia	1,613	3,945	4,082	2,347	1,891	13,878
Australasia	887	1,326	1,315	1,285	1,541	6,354
Africa	571	868	825	573	718	3,555
Middle East	372	443	742	440	353	2,350
Non response	109	391	869	302	176	1,847
Total	343,439	524,126	428,683	369,287	406,651	2,072,166