

Tourism Statistical Review

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Bahamas Ministry of Tourism & Aviation



In March 2021:

- Air & sea arrivals were down 79.2% for the month and 93.2% 2021 YTD.
- Stopover arrivals were down 31.9% for the month and 73.1% 2021 YTD.
- Cruise visitor arrivals to the Bahamas began to return in February 2021. Cruise arrivals were down by March 2021 YTD as service had just resumed to the destination during the month of February and most cruise lines had not yet returned.

Total Visitor Arrivals

In March 2021, The Bahamas received **62.7K** foreign air and sea arrivals, a decline of **79.2%** relative to March 2020, and foreign air arrivals to the Bahamas as a whole declined by **25.5%** and stood at **56.4K**. At the end of March 2020, the Bahamas had closed its borders to international traffic. In June 2020, the Bahamas officially reopened to international traffic that were coming by private planes or private boats and remained open for March 2021 for these visitors and the ones that travelled by commercial flights.

Air arrivals to the Out Islands were up by 39.7% during the month of March 2021. This increase was driven by the following islands: Abaco (+151.1%), Andros (+64.8%), Berry Islands (+69.3%), Cat Cay (+36.3%), Cat Island (+162.2%), Eleuthera (+46.4%), Exuma (+14.5%), Long Island (+27.3%), and Inagua (+16.7%).

Air arrivals during the month of

March were down in the following islands: Nassau/Paradise Island (-38.6% to 37.4K), Grand Bahama (-44.4%), Bimini (-13.0%), and San Salvador (-97.0%, the major hotel on island was still closed in March 2021).

In March 2021, stopover arrivals to the Out islands were up during the month as visitors flocked to these islands. Stopover arrivals were up in Abaco, Andros, Berry Islands, Cat Island, Exuma, Eleuthera, and Harbour Island.

By the end of March YTD, how-

ever, stopovers to most of the islands in the Bahamas were still down because the increases in March were not enough to balance out the declines of the previous months of 2021.

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 March 2021.

Meanwhile, cruise arrivals were down by March 2021 YTD.

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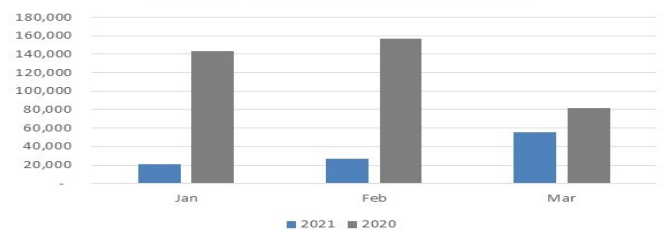
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Stopover Arrivals by Month



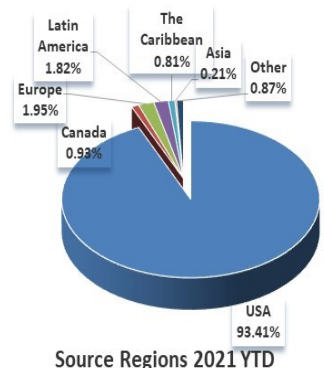
Stopover Arrivals (March YTD)

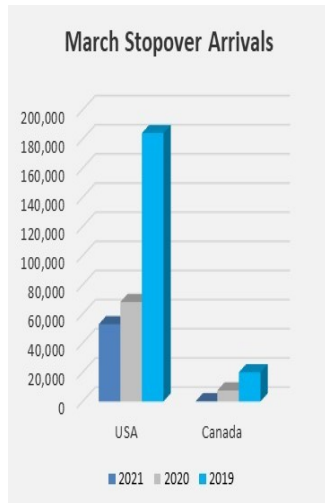
From January to March 2021, The Bahamas received **102.9K** stopovers (down 73.1% compared to the same period in 2020).

This reflects decreases in stopovers from the United States (down 68.3%), Canada (down 97.7%), Europe (down 91.5%), Latin America (down 69.6%), Caribbean (down 73.4%), Asia (down 87.3%), Africa (down 40.8%), Australasia (down 77.7%) and the Middle East (down 82.3%) for

January to March YTD.

For the year to date March YTD, **93.4%** of stopover visitors (**96.1K**) originated from the United States, while **1.95% (2.0K)** originated from Europe, **1.8% (1.9K)** from Latin America, **0.9% (957)** from Canada, **0.8% (832)** from the Caribbean, and **1.1% (892)** from the rest of the world.





North American Arrivals

United States

In March 2021, **53.0K** stopover arrivals were received from the United States, a decrease of **22.3%**, compared to March 2020.

In this regard, arrivals from all sales territories across the US declined, including: the Northeast (down 34.0%), the Midwest (down 22.9%), the Southeast (down 21.5%), and Florida (up 5.4%).

In March 2021 YTD the top 10 producing states were Florida (down 49.3%), New York (down 74.1%), Texas (down 60.9%), New Jersey (down 74.1%), Cali-

fornia (down 66.3%), Georgia (down 64.7%), Massachusetts (down 83.4%), North Carolina (66.9%), Ohio (65.9%), and Pennsylvania (down 79.1%).

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

Canada

In March 2021, a miniscule amount of stopover arrivals were received from Canada, a de-

crease of **96.5%**, compared to March 2020.

In March 2021 YTD, the top five producing provinces for stopovers were: Ontario (down 98.1%), Quebec (down 97.5%), Alberta (down 97.1%), British Columbia (down 97.2%), and Manitoba (down 97.5%).

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

In March,

European arrivals were down 78.2% for the month and 91.5% March YTD.

European Arrivals

In March 2021, a miniscule amount of stopover arrivals were received from European countries, a decrease of **78.2%**, compared to March 2020.

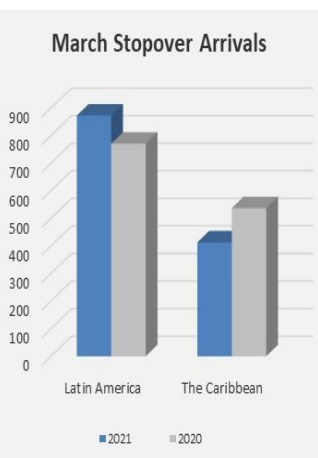
In March 2021, stopover arrivals from all sales territories across Europe were down, including: the UK, covering Italy, Netherlands, and the Nordic region

(down by 78.4%); France, covering Spain, Belgium, Portugal, Luxembourg, Monaco and Andorra (down 76.7%); and Germany, covering Central and Eastern Europe (down 78.8%).

By the end of March YTD, the top ten producing countries for stopover visitors 2021 were: the United Kingdom, France, Ger-

many, Switzerland, Netherlands, Spain, Italy, Russia, Turkey, and Denmark.

The top producing cities were: London, Aston, Gammelsdorf, Moscow, Delft, Paris, Istanbul, Salford, Luga, Sliema, and Rome.



Latin American & Caribbean Arrivals

Latin America

In March 2021, stopover arrivals received from Latin American countries increased by **13.2%** compared to March 2020.

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

The top ten producing cities were: Mexico City, Santiago, Buenos Aires, Lima, Guatemala

City, Bogota, Cancun, Sao Paulo, Panama City, and Toluca.

The Caribbean

In March 2021, a miniscule amount of stopover arrivals were received from Caribbean countries, a decrease of **23.1%**, compared to March 2020.

By the end of March YTD, the top producing countries for stopover visitors from the Caribbean were: Jamaica, Turks and Caicos, Puerto Rico, Dominican Republic, St. Kitts and Nevis, Cuba, Bermuda, Cayman Is-

lands, Guyana, Haiti, and Barbados,

The top ten producing cities were: Kingston, Lucea, Montego Bay, St. Catharines, Basseterre, Spanish Town, Guaynabo, West Bay, Havana, and Dorado.

Arrivals from the Rest of the World

Asia

In March 2021, a miniscule amount of stopover arrivals were received from Asian countries, a decrease of **65.8%** compared to March 2020. A miniscule amount of Asian visitors were received by March 2021 YTD, a 87.3% decrease from the same period in 2020.

The top producing countries for stopover visitors for March 2021 YTD were: Philippines, India, Hong Kong, Singapore, Japan, and Sri Lanka.

The top producing cities were: Caba, Cebu City, Las Pinas New Delhi and Haldwani.

Australasia

In March 2021, a miniscule amount of stopover arrivals were received from Australasian countries, a decrease of **49.3%** compared to March 2020.

The top producing countries for stopover visitors in March 2021 YTD were: Australia, and New Zealand.

Africa

In March 2021, stopover arrivals received from African countries saw an increase of **46.9%** compared to March 2020.

The top producing countries for stopover visitors for March YTD 2021 were: South Africa, Nigeria, Namibia, Zimbabwe, and Congo.

The top producing cities were: Cape Town, Durban, Johannesburg, Port Elizabeth, Pretoria, George and Knysna.

Middle East

In March 2021, a miniscule amount of stopover arrivals were received from Middle East-

ern countries, a decrease of **59.6%** compared to March 2020.

The top producing countries for stopover visitors for March 2021 YTD were: United Arab Emirates, Israel, and Qatar.

The top producing cities were: Dubai, Tel Aviv-Yafo, Abu Dhabi, Doha, and Holon.

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

Visitor Arrivals By Island

In March 2021, stopovers to the Bahamas overall were down 31.9% compared to March 2020 and this was as a result of decreased arrivals from most source markets except Latin America (+13.2%) and Africa (+46.9%) which were up during the month.

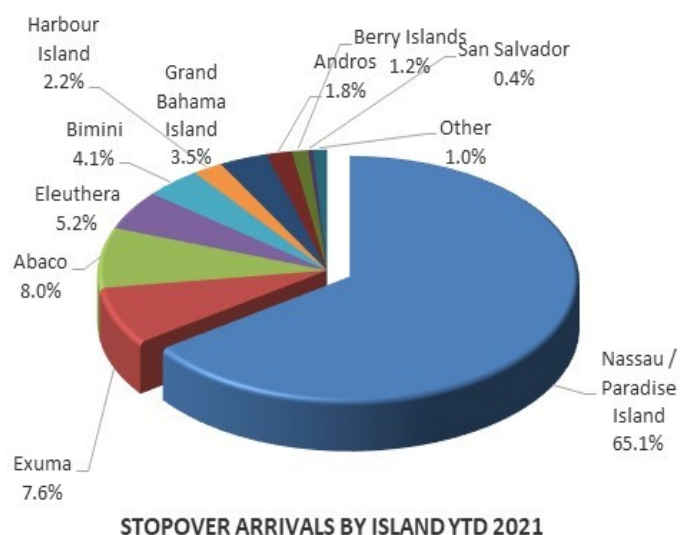
During the month, stopover visitor arrivals were down for the following islands: Nassau/Paradise Island (-38.8%), Grand Bahama (-76.7%), and Bimini (-21.8)

During the month, stopover visitor arrivals were up for the following islands: Abaco (96.0), Mainland Eleuthera (0.7%), Harbour Island in Eleuthera (24.2%), the Berry Islands (119.1), Exuma (14.0).

From January to March 2021,

compared to the same period in 2020, Nassau received **66.98K** stopover visitors, a decrease of 77.7%. During the period stopover declines were also noted on other Islands like Abaco (down 24.2% to 8.2K), Bimini (down 31.1% to 4.2K), Exuma (down 62.2% to 7.9K), Harbour Island Eleuthera (down 53.3%) and San Salvador (down 91.2%).

In March YTD 2021, Nassau was the top island destination for visitors from all source markets, receiving **65.1%** of stopover arrivals, followed by Abaco which had 8.0%, Eleuthera (Eleuthera as a whole including Harbour Island had **7.4%** of the market share of stopovers: i.e., Eleuthera mainland had **5.2%** and Harbour Island had **2.2%**), Exuma (7.6%), Bimini (4.1%), and Grand Bahama with 3.5%.



Travel Trends

From January to March 2021, the average length of stay of stopover visitors to The Bahamas was 9.2 nights with 51.6% staying 4 to 7 nights, 17.6% staying 2 to 3 nights, 14.2% staying 8 to 14 nights and 6.3% staying 22-90 nights.

Among the main source markets not including Africa (30.8 nts.) visitors from Latin America (10.3 nts.), Europe (22.2 nts.), Asia (28.4 nts.) and Australasia (33.2 nts.) stayed the longest on average, compared to an average stay of 8.6 nights for US visitors.

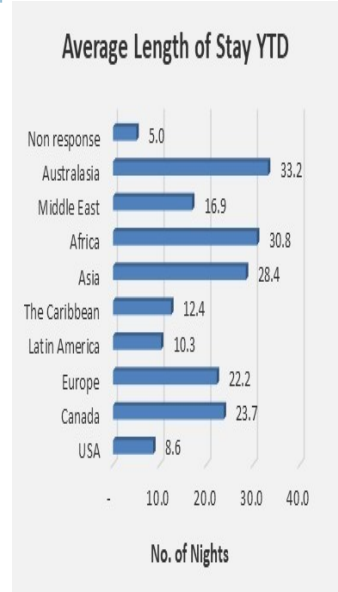
During this period, 55.1% of

visitors from all regions, were repeat visitors, with the largest proportion of repeat visitors from the main source markets coming from Africa (77.9%), Australasia (64.7%), Canada (69.1%), USA (55.2%), and the Caribbean (48.0%). The region with the lowest repeat visitor rate in the period was The Middle East (40.8%).

During the period, 66.2% of all stopover visitors came to The Bahamas primarily for a vacation, with 11.5% coming for weddings and honeymoons, and 3.6% for business.

Roughly nine in ten (85.2%) visitors stayed in hotels, 5.1% in vacation rentals/apartments or villas, 2.7% in timeshare properties, 1.8% on private boats and 3.5% with friends and relatives.

The average age of stopover visitors during this period was 41.0 years, with 42.4% of all visitors being between the ages of 25 and 54 years. As such, Generation X and Millennials accounted for 23.2% and 21.4% of visitors, respectively, followed by Post-Millennials (18.0%) and Baby Boomers (14.4%).



Mode of Arrival

From January to March 2021 YTD, 61.5% of stopover visitors to The Bahamas arrived by commercial airline, 27.9% by private plane, 6.0% 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 (57.7%), private planes (27.9%) and private yachts (9.3%); Europe were commercial airlines (46.5%), private planes (32.6%) and private yachts (14.7%); Latin America were commercial airlines (51.8%), private planes (35.8%) and yachts/boats (6.3%); The Caribbean were commercial airlines (57.7%), private planes (31.0%) and private yacht/boat (4.3%); Africa were commercial airlines (37.5%), private yacht/boat (39.4%), and private planes

(10.3%); Australasia were commercial airlines (40.7%), private yacht/boat (36.2%), and private plane (11.8%); Asia were commercial airlines (47.5%), private planes (25.7%) and yachts/boats (13.6%).

Airlift

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

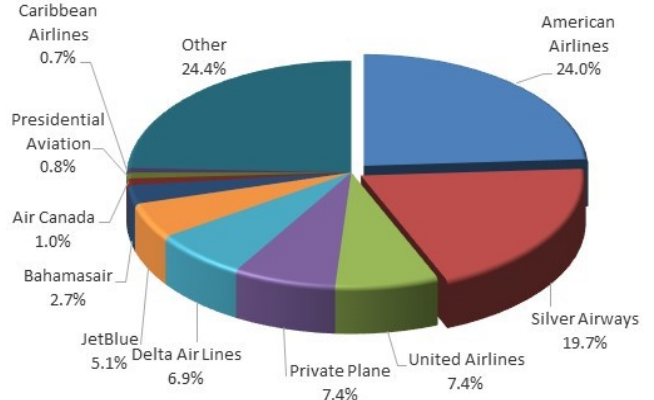
For the US YTD, American Airlines delivered the most stopover visitors from the Midwest (8.0K), followed by Silver Airways (5.2K), and Delta (2.2K). American Airlines delivered the most visitors from the Northeast (7.3K), followed by Silver Airways (5.10K) and United Airlines (4.7K). American Airlines delivered the most visitors from the Southeast (3.0K), followed by Silver Airways(2.8K) and Delta (2.1K). Of the commercial airlines, Silver Airways delivered the most visitors from Florida (4.8K), followed by American Airlines (3.9K) and Jet Blue (1.9k).

For Canada YTD, Air Canada

delivered the most stopover visitors, followed by Silver Airways, and American Airlines. For Europe YTD, Silver Airways delivered the most stopover visitors followed by American Airlines, and Air Canada. 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.

As of March YTD 2021, 11.5% of stopover visitors came to The Bahamas primarily for weddings and honeymoons.

COMMERCIAL AIRLINES AND OTHER TRANSPORTATION YTD



In February 2021, the Balearia began to bring cruise visitor arrivals to The Bahamas again and this continued into March 2021.

Cruise Arrivals

In March 2021, The Bahamas received a small amount of cruise arrivals by first port of entry as the Balearia Caribbean resumed service to Bimini and Grand Bahama. The Balearia brought in more sea stopovers than cruise arrivals during the month.

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 March YTD 2021 were down significantly as cruise ships had just resumed service to the island in the month of February 2021 and only the Balearia Caribbean had come in so far. Most of the cruise ports in the Bahamas had not yet opened for service in the 1st three months of 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 - March [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	39,073	168,239	-76.8%	37,404	60,904	-38.6%
Grand Bahama	1,973	21,903	-91.0%	1,081	1,945	-44.4%
Abaco	4,063	13,413	-69.7%	3,802	1,514	151.1%
Andros	794	493	61.1%	791	480	64.8%
Berry Islands	1,704	50,462	-96.6%	1,226	724	69.3%
Bimini	3,376	12,662	-73.3%	851	978	-13.0%
Cat Cay	511	501	2.0%	308	226	36.3%
Cat Island	194	94	106.4%	194	74	162.2%
Eleuthera	6,373	17,903	-64.4%	6,372	4,353	46.4%
Exuma	4,241	3,598	17.9%	4,062	3,548	14.5%
Half Moon Cay	-	11,829	-100.0%	-	-	0.0%
Inagua	191	138	38.4%	40	48	-16.7%
Long Island	224	174	28.7%	219	172	27.3%
San Salvador	28	709	-96.1%	21	690	-97.0%
Bahamas Overall	62,745	302,118	-79.2%	56,371	75,656	-25.5%

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]

	2021	2020	2021/2020	2021	2020	2021/2020
	Air and Sea		% Chg Air/Sea	Air Only		% Chg Air
Nassau/Paradise Island	68,217	874,745	-92.2%	65,074	288,284	-77.4%
Grand Bahama	4,438	107,292	-95.9%	2,471	8,805	-71.9%
Abaco	8,140	75,075	-89.2%	7,591	5,721	32.7%
Andros	2,133	2,025	5.3%	2,123	1,982	7.1%
Berry Islands	3,621	326,367	-98.9%	2,564	2,410	6.4%
Bimini	6,648	72,332	-90.8%	1,770	3,431	-48.4%
Cat Cay	1,096	1,672	-34.4%	611	846	-27.8%
Cat Island	423	294	43.9%	419	271	54.6%
Eleuthera	12,470	100,640	-87.6%	12,248	16,028	-23.6%
Exuma	7,470	16,358	-54.3%	7,189	16,137	-55.5%
Half Moon Cay	-	120,417	-100.0%	-	-	0.0%
Inagua	514	287	79.1%	193	125	54.4%
Long Island	615	501	22.8%	586	461	27.1%
San Salvador	89	3,570	-97.5%	43	3,507	-98.8%
Bahamas Overall	115,874	1,701,575	-93.2%	102,882	348,008	-70.4%

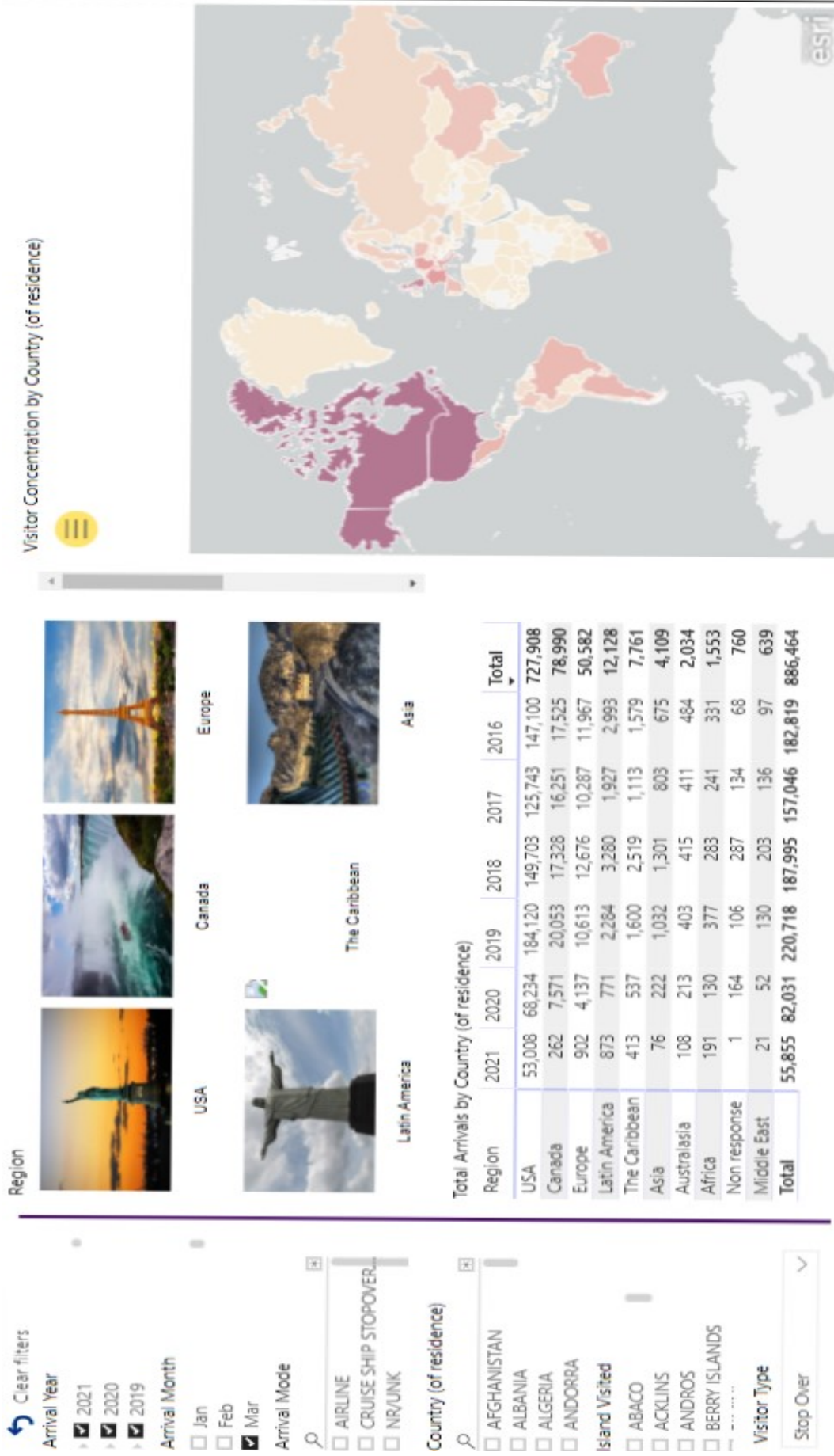
Source: Immigration and Customs various ports of entry in the Bahamas, & Research and Statistics Dept. Ministry of Tourism. All numbers are subject to revision.

Foreign Air & Sea Arrivals - 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	62,745	302,118	-79.2%	56,371	75,656	-25.5%
Grand Total	115,874	1,701,575	-93.2%	102,882	348,008	-70.4%

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

All Stopover Arrivals—March



All Stopover Arrivals—March YTD

