

Tourism Statistical Review

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May 2021

Bahamas Ministry of Tourism & Aviation



In May 2021:

- Air & sea arrivals were significantly up over 1000% for the month and down 83.6% 2021 YTD.
- Stopover arrivals were up significantly over 1000% for the month, however it was still down by 36.2% 2021 YTD.
- Cruise visitor arrivals to the Bahamas began to return in February 2021. Cruise arrivals were down 99.9% by May 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 May 2021, The Bahamas received **93.9K** foreign air and sea arrivals, a significant increase (over **1000%**) relative to May 2020. Foreign air arrivals to The Bahamas as a whole increased by over **1000%** and stood at **81.2K**. At the end of March 2020, The Bahamas had closed its borders to international traffic. In June 2020, The Bahamas officially re-opened to international traffic that were coming by private planes or private boats and remained open for May 2021 for these visitors and the ones that travelled by commercial flights.

Air arrivals to The Bahamas and especially the Out Islands were up significantly between May 2020 and 2021 as they climbed back up from zero. 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, Nassau/Paradise Island and San Salvador.

In May 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, Bimini, Cat Island, Exuma, Eleuthera, Harbour Island, Long Island, Inagua and San Salvador.

By the end of May YTD, however, stopovers to a few of the islands in The Bahamas were still down because the increases in May 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 May 2021. Hotel Occupancy for these large hotels in May 2021 was 38.8% although some properties had occupancies above 60% during the month.

Meanwhile, cruise arrivals which started again in February were still down by May 2021 YTD.

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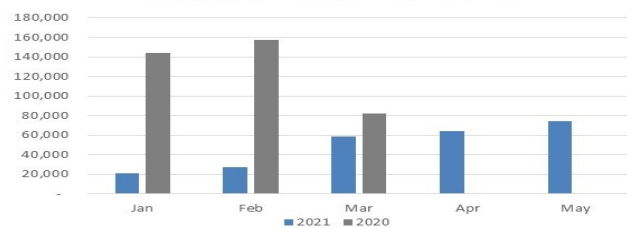
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Stopover Arrivals by Month



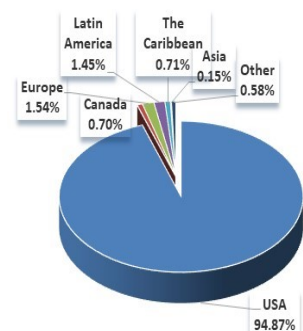
Stopover Arrivals (May YTD)

From January to May 2021, The Bahamas received **244.4K** stopovers (down 36.2% compared to the same period in 2020).

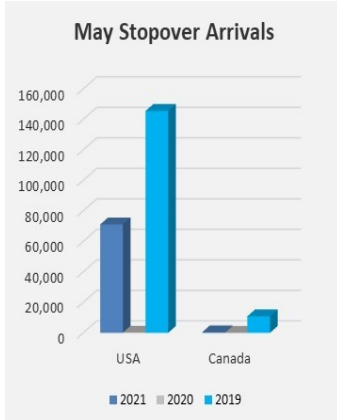
This reflects decreases in stopovers from the United States (down 23.5%), Canada (down 95.9%), Europe (down 84.1%), Latin America (down 42.6%), Caribbean (down 44.6%), Asia (down 79.7%), Africa (down 0.3%), Australasia (down 64.2%) and the Middle East (down 58.0%) for

January to May YTD.

For the year to date May YTD, **94.9%** of stopover visitors (**231.9K**) originated from the United States, while **1.54%** (**3.8K**) originated from Europe, **1.45%** (**3.6K**) from Latin America, **0.7%** (**1.71K**) from Canada, **0.7%** (**1.74K**) from the Caribbean, and **0.7%** (**1.4K**) from the rest of the world.



Source Regions 2021 YTD



North American Arrivals

United States

In May 2021, **71.1K** stopover arrivals were received from the United States, a tremendous increase (over 1000%) compared to May 2020.

In this regard, arrivals from all sales territories across the US increased, including: the Northeast, the Midwest, Florida, and Southeast.

In May 2021 YTD the top 10 producing states were Florida (up 17.7%), New York (down 39.4%), Texas (down 7.1%), New Jersey (down 27.5%), Georgia (up 4.7%), California (down 7.0%), North Carolina

(down 10.5%), Massachusetts (down 55.6%), Pennsylvania (down 49.3%) and Connecticut (down 26.7%).

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

Canada

In May 2021, stopover arrivals received from Canada increased substantially (over 1000%) compared to May 2020.

In May 2021 YTD, the top five producing provinces for stopovers were: Ontario (down 96.5%), Quebec (down 95.8%), Alberta (down 95.3%), British Columbia (down 94.8%), and Manitoba (down 92.9%).

The top ten producing cities YTD were: Toronto, Mississauga, Calgary, Winnipeg, Montreal, Vaughan, Oakville, Ottawa, Markham, and Vancouver.

In May, European arrivals were up tremendously for the month and down 84.1% May YTD.

European Arrivals

In May 2021, stopover arrivals received from European countries increased substantially (over 1000%) compared to May 2020.

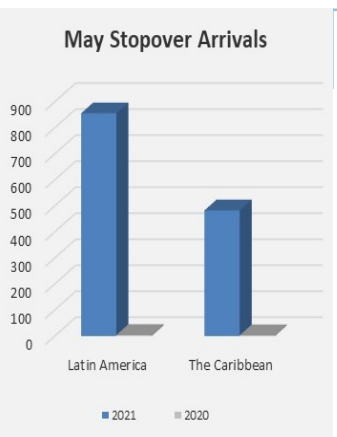
In May 2021, stopover arrivals from all sales territories across Europe were up, including: the UK, covering Italy, Netherlands, and the Nordic region; Germany,

covering Central and Eastern Europe; and France, covering Spain, Belgium, Portugal, Luxembourg, Monaco and Andorra.

By the end of May 2021 YTD, the top ten producing countries for stopover visitors were: the United Kingdom (down 86.0%), France (down 90.5%), Germany (down 87.6%), Switzerland

(down 72.3%), Italy (down 88.0%), Netherlands (down 63.2%), Spain (down 65.1%), Russia (down 70.3%), Ireland (down 71.1%) and Turkey (down 62.7%).

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



Latin American & Caribbean Arrivals

Latin America

In May 2021, stopover arrivals received from Latin American countries increased substantially (over 1000%) compared to May 2020.

By the end of May YTD the top ten producing countries for stopover visitors during the period were: Mexico (+70.7%), Brazil (-70.7%), Colombia (-43.9%), Argentina (-76.1%), Peru (-35.3%), Chile (-49.6%), Panama (-42.3%), Venezuela (-44.1%), Guatemala (-13.1%), Ecuador (-

51.6%), and Costa Rica (-43.8%).

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

The Caribbean

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

By the end of May YTD, the top

producing countries for stopover visitors from the Caribbean were: Jamaica (-30.9%), Turks and Caicos (-23.9%), Puerto Rico (-6.2%), Dominican Republic (-19.9%), Cuba (+4.4%), Cayman Islands (-78.6%), Bermuda (-66.9%), St. Kitts and Nevis (+60.0%), Guyana (-52.2%), Barbados (-77.6%), and Haiti (-62.1%).

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

Arrivals from the Rest of the World

Asia

In May 2021, stopover arrivals received from Asian countries, increased compared to May 2020. A miniscule amount of Asian visitors were received by May 2021 YTD, a -79.7% decrease from the same period in 2020.

The top producing countries for stopover visitors for May 2021 YTD were: Philippines (down 46.7%), India (down 70.7%), Japan (down 92.7%), Hong Kong (down 80.0%), China (down 97.8%) Singapore (down 72.1%), and Pakistan (up 60%).

The top producing cities were: Caba, Cebu City, Bengaluru, Mumbai, Pop, New Delhi and Seoul.

Australasia

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

from Australasian countries, but it was a tremendous increase compared to May 2020.

The top producing countries for stopover visitors in May 2021 YTD declined compared to the same period of 2020, Australia (-69.6%) and New Zealand (-35.5%).

Africa

In May 2021, stopover arrivals received from African countries saw a substantial increase (over 1000%) compared to May 2020.

The top producing countries for stopover visitors for May YTD 2021 were: South Africa (up 16.8%), Namibia, Nigeria, Zimbabwe and Congo.

The top producing cities were: Cape Town (+40.7%), Durban (+27.1%), Johannesburg (-51.9%), Pretoria (-8.0%), Port Elizabeth (+175%), Knysna

(+8.3%) and George (+100%).

Middle East

In May 2021, there was a significant increase in stopover arrivals received from Middle Eastern countries compared to May 2020.

The top producing countries for stopover visitors for May 2021 YTD were: Israel (down 55.7%), United Arab Emirates (down 37.8%), and Qatar (down 53.3%).

The top producing cities were: Dubai (-34.2%), Tel Aviv-Yafo (-38.9%), Abu Dhabi (-43.5%), Doha (-46.2%), and Haifa (-46.2%)

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

Visitor Arrivals By Island

In May 2021, stopovers to The Bahamas overall were up substantially (over 1000%) compared to May 2020 and this was due to the relaxation of travel restrictions as more and more people got vaccinated.

During the month, stopover visitor arrivals were up tremendously for the following islands: Nassau/Paradise Island, Grand Bahama, Bimini, Abaco, Mainland and Harbour Island Eleuthera the Berry Islands, and Exuma.

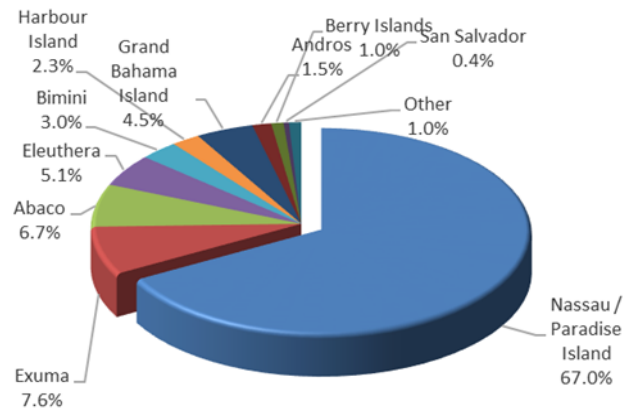
From January to May 2021 the following islands experienced increases in stopover visitors: Abaco (+53.2% to 16.4K), Andros (+33.2% to 3.6K), Berry Islands (+258.1% to 2.3K), Bimini (+13.1% to 7.4K), Mainland Eleuthera (+1.6% to 12.4K), and Harbour Island Eleuthera (+15.4% to

5.5K),

During the same period, 2021 YTD, other islands suffered declines in stopovers compared to the same period in 2020, Nassau/Paradise Island received **163.7K** stopover visitors, a decrease of 45.5%. During the period, stopover declines were also noted on other Islands like Exuma (-11.3% to 18.5K stopovers), Grand Bahama (-37.7% to 11.1K), and San Salvador (-75.4% to 1K).

In May YTD 2021, Nassau was the top island destination for visitors from all source markets, receiving **67.0%** of stopover arrivals, followed by Exuma (7.6%), Total Eleuthera 7.4% (i.e. mainland Eleuthera 5.1% and Harbour Island 2.3% of the market share of stopovers), Abaco (6.7%), Bimini (3.0%), and Grand Baha-

ma (4.5%).



STOPOVER ARRIVALS BY ISLAND YTD 2021

Travel Trends

From January to May 2021, the average length of stay of stopover visitors to The Bahamas was 7.8 nights with 55.6% staying 4 to 7 nights, 18.8% staying 2 to 3 nights, 12.8% staying 8 to 14 nights and 4.3% staying 22-90 nights.

Among the main source markets not including Africa (30.3 nts.) visitors from Latin America (10.0 nts.), Europe (19.5 nts.), Asia (25.0 nts.) and Australasia (31.5 nts.) stayed the longest on average, compared to an average stay of 7.4 nights for US visitors.

During this period, 51.2% of

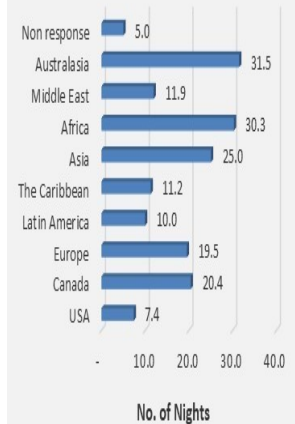
visitors from all regions, were repeat visitors, with the largest proportion of repeat visitors from the main source markets coming from Africa (80.1), Australasia (66.3%), Canada (67.4%), USA (51.2%), and the Caribbean (48.2%). The region with the lowest repeat visitor rate in the period was The Middle East (35.1%).

During the period, 67.9% of all stopover visitors came to The Bahamas primarily for a vacation, with 12% coming for weddings and honeymoons, and 3.0% for business.

Roughly nine in ten (85.3%) visitors stayed in hotels, 4.7% in vacation rentals/apartments or villas, 3.4% in timeshare properties, 2.9% with friends and relatives, and 1.7% on private boats.

The average age of stopover visitors during this period was 41.5 years, with 43% of all visitors being between the ages of 25 and 54 years. As such, Millennials and Generation Xers accounted for 22.6% and 22.5% of visitors, respectively, followed by Post-Millennials (17.0%) and Baby Boomers (15.4%).

Average Length of Stay YTD



As of May YTD

2021, 12.0% of stopover visitors came to The Bahamas primarily for weddings and honeymoons.

Mode of Arrival

From January to May 2021 YTD, 65.1% of stopover visitors to The Bahamas arrived by commercial airline, 26.4% by private plane, 4.7% by private boat/yacht, and 0.7% 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 (54.6%), private planes (33.3%) and private yachts (7.5%); Europe were commercial airlines (50.3%), private planes (30.7%) and private yachts (13.1%); Latin America were commercial airlines (51.0%), private planes (38.4%) and yachts/boats (5.2%); The Caribbean were commercial airlines (62.0%), private planes (29.0%) and private yacht/boat (3.0%); Africa were commercial airlines (41.0%), private yacht/boat (36.0%), and private planes

(9.0%); Australasia were commercial airlines (43.0%), private yacht/boat (31.0%), and private plane (14.0%); Asia were commercial airlines (49%), private planes (29.0%) and yachts/boats (11.0%).

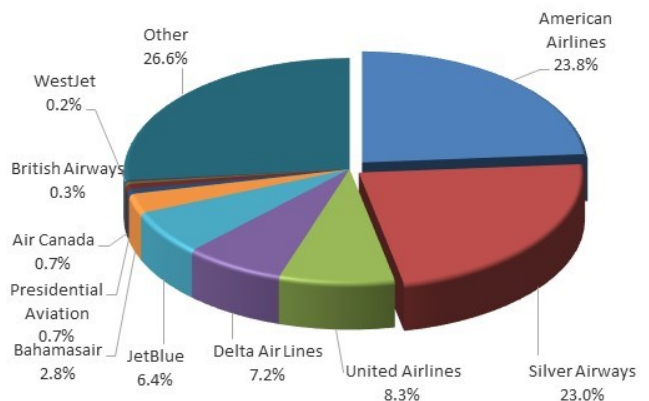
Airlift

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

For the US YTD, American Airlines delivered the most stopover visitors from the Midwest (19.7K), followed by Silver Airways (13.8K), and United Airlines (6.6K). American Airlines delivered the most visitors from the Northeast (16.2K), followed by Silver Airways (15.0K) and United Airlines (11.8K). Silver Airways delivered the most visitors from the Southeast (9.3K), followed by American Airlines (8.6K) and Delta (5.8K). Of the commercial airlines, Silver Airways delivered the most visitors from Florida (12.9K), followed by American Airlines (8.6K) and Jet Blue (4.9K).

For Canada YTD, Silver Airways, delivered the most stopover visitors, followed by American Airlines and Air Canada. For Europe YTD, Silver Airways delivered the most stopover visitors followed by American Airlines, and British Airways. For Latin America YTD, American Airlines delivered the most stopover visitors, followed by Silver Airlines and Bahamasair. 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 visitor arrivals to The Bahamas again and this continued into May 2021.

Cruise Arrivals

In May 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 Baha-

mas.

Cruise arrivals (first port of entry) by May YTD 2021 were down significantly by 99.9% as cruise ships had just resumed service to The Bahamas 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 early 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 - May [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	55,568	20	277740.0%	54,264	20	271220.0%
Grand Bahama	4,290	-	up	1,976	-	up
Abaco	6,931	-	up	5,623	-	up
Andros	1,239	-	up	1,234	-	up
Berry Islands	1,883	-	up	1,071	-	up
Bimini	7,431	-	up	1,554	-	up
Cat Cay	1,122	-	up	432	-	up
Cat Island	234	-	up	234	-	up
Eleuthera	7,711	-	up	7,569	-	up
Exuma	6,917	-	up	6,823	-	up
Half Moon Cay	-	-	0.0%	-	-	0.0%
Inagua	176	-	up	51	-	up
Long Island	283	-	up	265	-	up
San Salvador	91	-	up	72	-	up
Bahamas Overall	93,876	20	469280.0%	81,168	20	405740.0%

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

Foreign Air & Sea Arrivals - May 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	165,163	874,808	-81.1%	159,521	288,315	-44.7%
Grand Bahama	11,418	107,292	-89.4%	5,837	8,805	-33.7%
Abaco	19,746	75,075	-73.7%	17,452	5,721	205.1%
Andros	4,635	2,025	128.9%	4,612	1,982	132.7%
Berry Islands	7,437	326,367	-97.7%	5,039	2,410	109.1%
Bimini	19,086	72,332	-73.6%	4,184	3,431	21.9%
Cat Cay	3,034	1,672	81.5%	1,457	846	72.2%
Cat Island	955	294	224.8%	951	271	250.9%
Eleuthera	26,067	100,640	-74.1%	25,567	16,028	59.5%
Exuma	18,716	16,358	14.4%	18,242	16,137	13.0%
Half Moon Cay	-	120,417	-100.0%	-	-	0.0%
Inagua	958	287	233.8%	292	125	133.6%
Long Island	1,136	501	126.7%	1,063	461	130.6%
San Salvador	210	3,570	-94.1%	138	3,507	-96.1%
Bahamas Overall	278,561	1,701,638	-83.6%	244,355	348,039	-29.8%

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%
Grand Total	278,561	1,701,638	-83.6%	244,355	348,039	-29.8%

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—May

Clear filters

Arrival Year

- 2021
- 2020
- 2019
- 2018
- 2017

Arrival Month

- Jan
- Feb
- Mar
- Apr
- May

Country (of residence)

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

Visitor Type

Stop Over

Region



USA



Canada



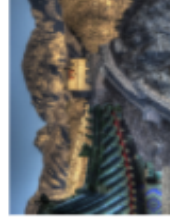
Europe



Latin America

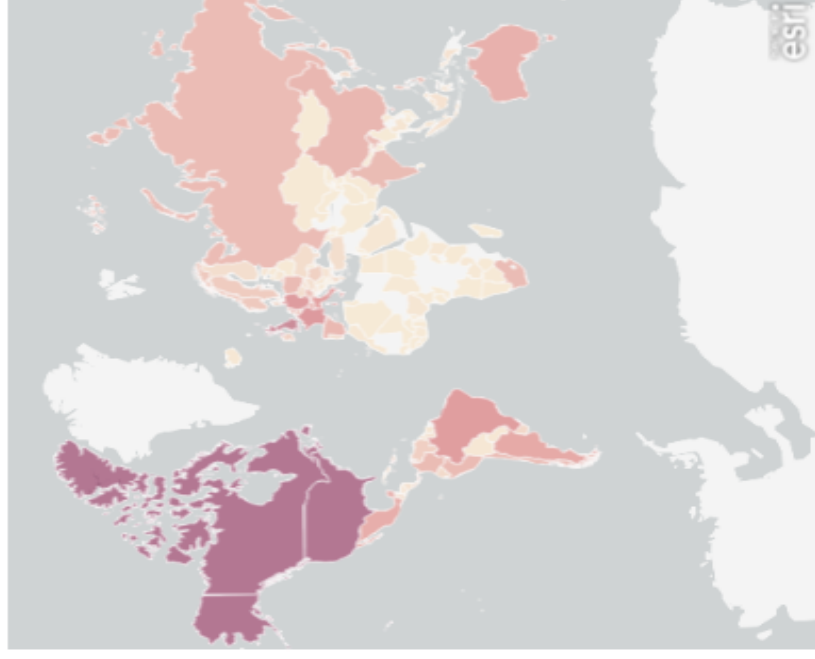


The Caribbean



Asia

Visitor Concentration by Country (of residence)



Total Arrivals by Country (of residence)

Region	2021	2020	2019	2018	2017	2016	Total
USA	71,112	109	145,492	116,009	110,122	113,908	556,752
Canada	355	2	10,825	9,245	8,174	9,852	38,453
Europe	714	3	9,173	9,481	8,418	9,479	37,268
Latin America	856	4	4,774	3,010	2,568	2,697	13,909
The Caribbean	483	3	2,153	2,066	1,826	2,287	8,818
Asia	67		1,178	1,394	867	803	4,309
Australasia	70		530	516	476	508	2,100
Africa	120	4	352	229	234	228	1,167
Middle East	59		148	181	202	146	736
Non response			85	152	184	84	505
Total	73,836	125	174,710	142,283	133,071	139,992	664,017

All Stopover Arrivals—May YTD

Clear filters

Arrival Year

- 2021
- 2020
- 2019
- 2018
- 2017

Arrival Month

- Jan
- Feb
- Mar
- Apr
- May

Country (of residence)

Country (of residence)

- AFGHANISTAN
- ALBANIA
- ALGERIA
- ANDORRA
- ANGOLA
- ...

Island Visited

- ABACO
- ACKLINS
- ANDROS
- BERRY ISLANDS
- ...

Visitor Type

Stop Over

Region



USA



Canada



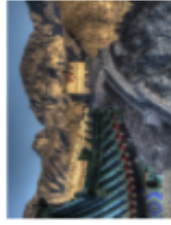
Europe



Latin America

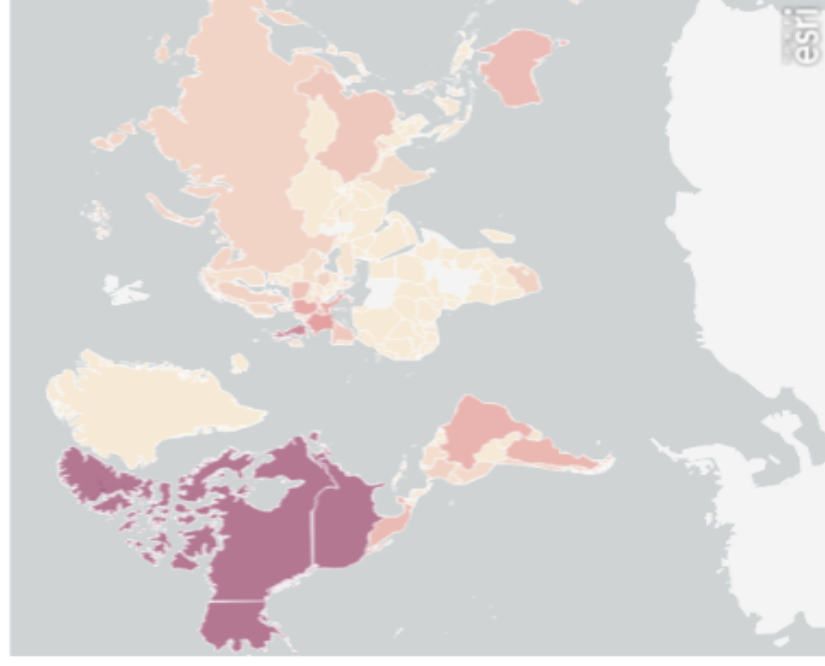


The Caribbean



Asia

Visitor Concentration by Country (of residence)



Total Arrivals by Country (of residence)

Region	2021	2020	2019	2018	2017	2016	Total
USA	231,879	303,295	710,815	553,548	507,737	536,123	2,843,397
Canada	1,714	42,006	77,114	68,307	62,600	71,799	323,540
Europe	3,760	23,634	58,897	59,608	51,669	50,051	247,619
Latin America	3,554	6,191	16,999	17,647	14,449	14,755	73,595
The Caribbean	1,739	3,138	8,189	9,252	8,095	8,721	39,134
Asia	361	1,775	5,981	6,645	4,094	3,440	22,296
Australasia	356	995	2,473	2,393	2,442	2,635	11,294
Africa	707	709	1,522	1,336	1,146	1,206	6,626
Middle East	168	400	830	1,118	814	693	4,023
Non response	184	799	601	1,256	647	325	3,812
Total	244,422	382,942	883,421	721,110	653,693	689,748	3,575,336