

Tourism Statistical Review

Volume 3, Issue 11

24.11.21

November 2021

Bahamas Ministry of Tourism & Aviation



In November 2021:

- Air & sea arrivals were significantly up over 1000% for the month and down 9.7% 2021 YTD compared to 2020.
- Stopover arrivals were up by 932.4% for the month, and up 84.6% 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 44.8% by November 2021 YTD as service had just resumed to the destination during the month of February and many cruise lines had not resumed their full operations yet.

Total Visitor Arrivals

In November 2021, The Bahamas received **383.7K** foreign air and sea arrivals, an increase of over 1000 percent relative to November 2020. Foreign air arrivals to The Bahamas as a whole increased by 700.5% and stood at **90.2K**. 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 November 2021.

Air arrivals to The Bahamas were up significantly between November 2020 and November 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, Long Island, Nassau/Paradise Island. Club Med was still closed on San Salvador.

In November 2021, stopover arrivals to the Out Islands were up

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, Harbour Island, Mainland Eleuthera, and Long Island.

By the end of November YTD 2021, stopovers to San Salvador were down due to the closure of Club Med. Most of the other islands experienced growth for the period.

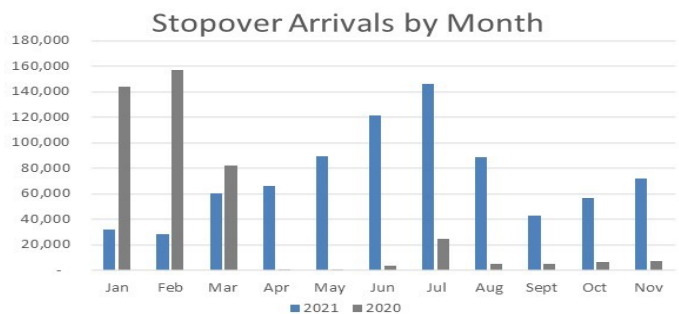
At the end of March 2020, most of the large hotels in Nassau/

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 November 2021. Hotel Occupancy for these large hotels in November 2021 was 50.8% although two properties had occupancies above 60% and one over 70% during the month.

Meanwhile, cruise arrivals which started again in February 2021 were still down by November 2021 YTD but were beginning to grow again, as cruise lines resumed service to The Bahamas.

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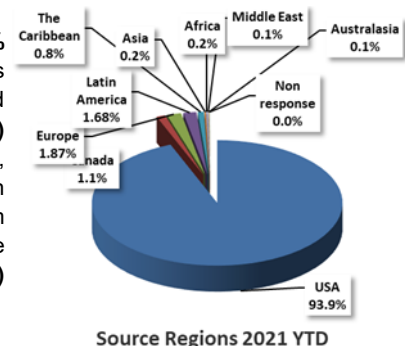
Stopover Arrivals (November YTD)

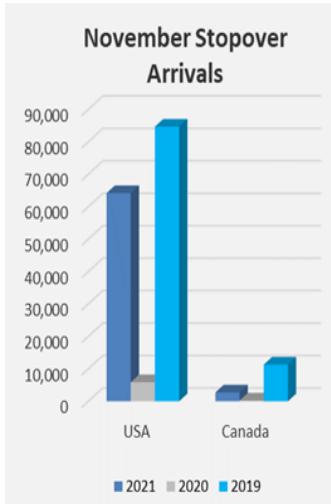
From January to November 2021, The Bahamas received **802.4K** stopovers, up 84.6% compared to the same period in 2020.

This reflects increases in stopovers from the United States (up 114.9%), Latin America (up 83.7%), Caribbean (up 77.7%), Africa (up 53.5%), and the Middle East (up 90.6%), and decreases in Canada (down 78.8%), Europe (down 39.3%), Asia (down 26.3%), Australasia (down 26.0%) for Jan-

uary to November YTD.

For November YTD, **93.9%** (**753.7K**) of stopover visitors originated from the United States, while **1.87%** (**15.0K**) originated from Europe, **1.68%** (**13.5K**) from Latin America, **1.1%** (**9.0K**) from Canada, **0.8%** (**6.2K**) from the Caribbean, and **0.6%** (**5.0K**) from the rest of the world.





North American Arrivals

United States

In November 2021, **64.1k** stopover arrivals were received from the United States, an increase of 993.0% compared to November 2020.

In this regard, arrivals from all sales territories across the US increased, including: Florida (389.1%), the Northeast (over 1000%), the Midwest (over 1000%), and Southeast (over 1000%).

In November 2021 YTD the top 10 producing states were Florida (up 167.1%), New York (up 85.5%), Texas (up 193.2%), New Jersey (up 155.0%), Cali-

fornia (up 177.6%), Georgia (up 186.1%), North Carolina (up 139.6%), Pennsylvania (up 74.0%), Massachusetts (up 13.1%), and Virginia (up 103.4%).

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

Canada

In November 2021, 2.7K stopo-

ver arrivals were received from Canada, a substantial increase (over 1000%) compared to November 2020.

In November 2021 YTD, the top five producing provinces for stopovers were: Ontario (down 79.1%), Quebec (down 82.8%), Alberta (down 73.2%), British Columbia (down 76.4%), and Manitoba (down 68.4%).

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

In November, European arrivals were up tremendously for the month but down 39.0% November YTD.

European Arrivals

In November 2021, 2.5K stopover arrivals were received from European countries and were up by 678.8% compared to November 2020.

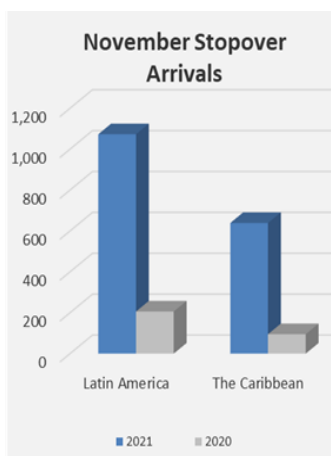
In November 2021, stopover arrivals from all sales territories across Europe were up, including: the UK, covering Italy, Netherlands, and the Nordic region

(up 805.5%); Germany, covering Central and Eastern Europe; (580.5%) and France, covering Spain, Belgium, Portugal, Luxembourg, Monaco and Andorra (up 559.6%).

By the end of November 2021 YTD, the top ten producing countries for stopover visitors were: the United Kingdom (down

32.9%), France (down 66.2%), Germany (down 45.8%), Switzerland (down 6.5%), Italy (down 57.7%), Netherlands (up 13.5%), Spain (up 5.0%), Russia (down 29.5%), Romania (down 48.1%) and Poland (down 60.4%).

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



Latin American & Caribbean Arrivals

Latin America

In November 2021, 1.1K stopover arrivals were received from Latin American countries an increase of 420.9% compared to November 2020.

By the end of November YTD the top ten producing countries for stopover visitors during the period were: Mexico (+145.1%), Brazil (+72.6%), Columbia (+129.0%), Argentina (-15.7%), Panama (+133.1%), Peru (+142.2%), Chile (+46.5%), Venezuela (+92.1%), Ecuador (+96.5%), and Guatemala

(+94.7%).

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

The Caribbean

In November 2021, stopover arrivals received from Caribbean countries increased by 572.6% compared to November 2020.

By the end of November YTD, the top producing countries for stopover visitors from the Carib-

bean were: Jamaica (+106.9%), Turks and Caicos (+139.0%), Puerto Rico (+190.7%), Dominican Republic (+170.8%), Cuba (+151.3%), Trinidad and Tobago (-46.8%), Cayman Islands (-27.0%), Bermuda (+27.1%), Barbados (-32.0%), and Guyana (+84.9%).

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

Arrivals from the Rest of the World

Asia

In November 2021, stopover arrivals received from Asian countries saw an increase of 656.3% compared to November 2020. A small amount of Asian visitors were received by November 2021 YTD, a -26.0% decrease from the same period in 2020.

The top producing countries for stopover visitors for November 2021 YTD were: Philippines (up 49.2%), India (up 5.4%), Hong Kong (up 19.7%), China (down 85.9%) Japan (down 65.8%), Singapore (down 13.0%) and South Korea (down 68.5%).

The top producing cities were: Caba, Mumbai, Cebu City, Chas, New Delhi, Tulac, Pune, Pop, Hermosa, and Bengaluru.

Australasia

In November 2021, a small

amount of stopover arrivals were received from Australasian countries, but it saw a +148.8% increase compared to November 2020.

The top producing countries for stopover visitors in November 2021 YTD declined by 26.0% compared to the same period of 2020. The two top countries from the region were down Australia (-33.5%) and New Zealand (0.0%).

Africa

In November 2021, stopover arrivals received from African countries saw an increase of 101.4% compared to November 2020.

The top producing countries for stopover visitors for November YTD 2021 were: South Africa (+56.4%), Nigeria (+221.4%), Ghana (+150.0%), Kenya (0.0%), and Burkina Faso

(+300.0%).

The top producing cities were: Cape Town (+89.2%), Durban (+30.1%), Johannesburg (+8.4%), Pretoria (+57.5%), George (+191.7%), Port Elizabeth (+106.3%), and Knysna (+52.4%).

Middle East

In November 2021, there was increase (+914.3%) in stopover arrivals received from Middle Eastern countries compared to November 2020.

The top producing countries for stopover visitors for November 2021 YTD were: Israel (up 135.3%), United Arab Emirates (up 67.7%), and Qatar (up 212.5%).

The top producing cities were: Dubai (+98.8%), Doha (+200.0%), Tel-Aviv-Yafo, Jaffa (+450%), Jerusalem (+92.3%) and Abu Dhabi(-18.5%).

In November, stopover arrivals from Asia and Australasia were up for the month but still down for the year 2021 YTD.

Visitor Arrivals By Island

In November 2021, stopovers to The Bahamas overall were up (+932.4%) compared to November 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 for Nassau/Paradise Island (over 1000%, Exuma (+709.0%), Grand Bahama (+167.4%), Abaco (+569.1%), Mainland Eleuthera (over 1000%), Bimini (+162.2%), and Harbour Island Eleuthera (over 1000%), Andros (+341.2%) and the Berry Islands(+158.6%).

During the month, stopover visitor arrivals were down for San Salvador (-60.6%).

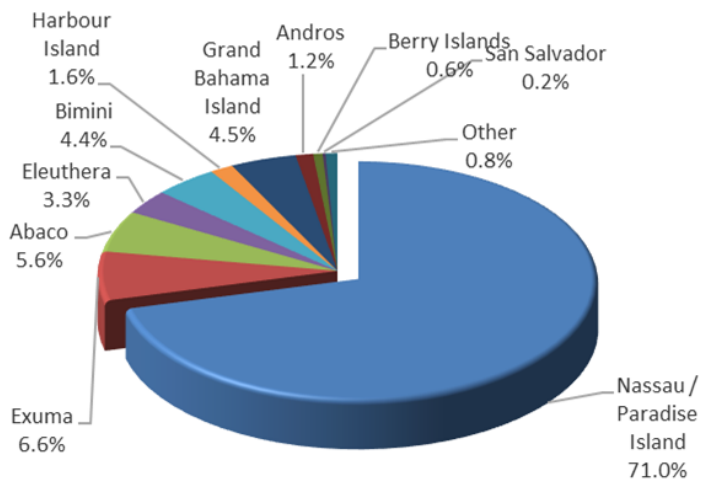
From January to November 2021 the following islands experienced

increases in stopover visitors: Nassau/Paradise Island received **569.7K** stopover visitors, an increase of 76.0%. Grand Bahama (+69.1% to 36.5K), Abaco (+185.9% to 45.0K), Andros (+136.0% to 9.7K), Berry Islands (+177.5% to 5.2K), Bimini (+153.7% to 35.3K), Mainland Eleuthera (+82.2% to 26.7K), Harbour Island Eleuthera (+116.8% to 12.9K), and Exuma (+111.0% to 53.3K stopovers).

During the period, stopover declines were noted on San Salvador (-68.0% to 1.6K).

In November YTD 2021, Nassau was the top island destination for visitors from all source markets, receiving 71.0% of stopover arrivals, followed by Exuma (6.6%), Abaco (5.6%), Total Eleuthera 4.9% (i.e. mainland Eleuthera

3.3% and Harbour Island 1.6% of the market share of stopovers), Grand Bahama Island (4.5%), and Bimini (4.4%).



STOPOVER ARRIVALS BY ISLAND YTD 2021

Travel Trends

From January to November 2021, the average length of stay of stopover visitors to The Bahamas was 6.8 nights with 58.5% staying 4 to 7 nights, 19.4% staying 2 to 3 nights, 11.7% staying 8 to 14 nights and 2.7% staying 22-90 nights.

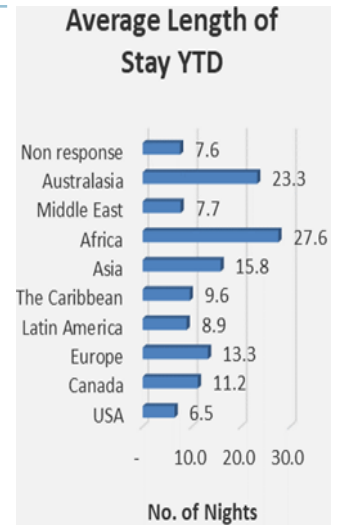
Among the main source markets not including Africa (27.6 nts.) visitors from Australasia (23.3 nts.), Asia (15.8 nts.), Europe (13.3 nts.), the Caribbean (9.6 nts.), and Latin America (8.9 nts.), stayed the longest on average, compared to an average stay of 6.5 nights for US visitors.

During this period, 46.5% of visitors from all regions, were repeat visitors, with the largest proportion of repeat visitors from the main source markets coming from Africa (77.6%), Australasia (60.1%), Canada (55.3%), USA (46.7%), Europe (42.1%) and the Caribbean (44.5%). The region with the lowest repeat visitor rate in the period was The Middle East (24.3%).

During the period, 69.6% of all stopover visitors came to The Bahamas primarily for a vacation, with 13.0% coming for weddings and honeymoons, and 2.7% for business.

Roughly nine in ten (86.7%) visitors stayed in hotels, 4.0% in vacation rentals/apartments or villas, 3.6% in timeshare properties, 2.1% with friends and relatives, and 1.4% on private boats.

The average age of stopover visitors during this period was 40.5 years, with 43.7% of all visitors being between the ages of 25 and 54 years. As such, Millennials and Generation X accounted for 22.6% and 23.2% of visitors, respectively, followed by Post-Millennials (18.7%) and Baby Boomers (14.1%).



Mode of Arrival

From January to November 2021 YTD, 70.6% of stopover visitors to The Bahamas arrived by commercial airline, 19.5% by private plane, 5.3% by private boat/yacht, and 1.4% 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 (76.9%), private planes (17.4%) and private yachts (3.1%); Europe were commercial airlines (70.0%), private planes (18.7%) and private yachts (6.0%); Latin America were commercial airlines (63.1%), private planes (26.0%) and yachts/boats (4.5%); The Caribbean were commercial airlines (66.1%), private planes (24.6%) and private yacht/boat (2.7%); Africa were commercial airlines (43.2%), private yacht/boat (35.2%), and private planes

(9.0%); Australasia were commercial airlines (52.6%), private yacht/boat (23.6%), and private plane (13.4%); Asia were commercial airlines (62.9%), private planes (19.7%) and yachts/boats (7.2%).

Airlift

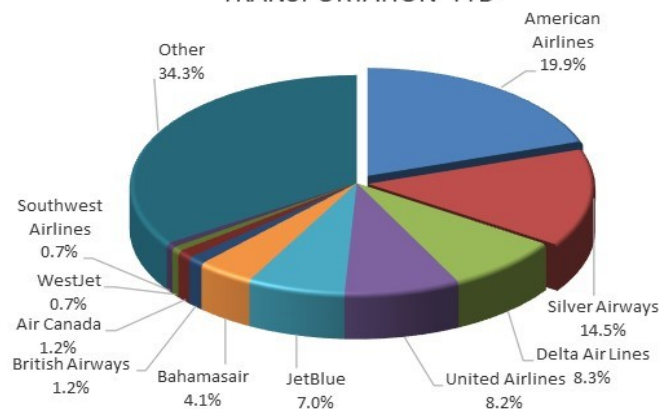
In November YTD, the top ten commercial airlines were: American Airlines, Silver Airways, Delta Air Lines, United Airlines, JetBlue, Bahamasair, British Airways, Air Canada, and WestJet.

For the US November YTD, American Airlines delivered the most stopover visitors from the Northeast (44.2K) followed by Silver Airways (43.4K) and United Airlines (40.5K). American Airlines delivered the most visitors from the Midwest (62.7K), followed by Silver Airways (34.9K) and United Airlines (25.4K). Silver Airways delivered the most visitors from Florida (37.4K), followed by American Airlines (24.1K) and Bahamasair (23.4K). Of the commercial airlines, American Airlines delivered the most visitors from the Southeast (26.9K), followed by Silver Airways (23.6K) and Delta Airlines (23.2K). For Canada YTD, Air

Canada delivered the most stopover visitors followed by West Jet and Silver Airways. 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 COPA Airlines, and Silver Airways. For the Caribbean YTD, Caribbean Airlines delivered the most stopover visitors followed by Silver Airways and American Airlines.

As of November YTD 2021, 13.0% 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 visitors to The Bahamas again and by November 2021 other cruise lines like RCCL, Crystal Cruises, Carnival Cruises, Celebrity Cruises, and others had resumed service to the destination.

Cruise

In November 2021, The Bahamas received cruise arrivals on many cruise lines that had resumed service to the destination. Royal Caribbean Cruise Lines resumed service in The Bahamas on June 12, 2021 (Cruise and Maritime Dept. Bahamas Ministry of Tourism, 2021). Moreover, RCCL and Crystal Cruises began temporarily homeporting with a couple 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 November YTD 2021 were still down by 44.8% but Royal Caribbean Cruise lines, Carnival, Celebrity, Disney, MSC Cruises, and Norwegian, had once again resumed service to The Bahamas after more than a year of absence due to the glob-

al pandemic. 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 as the year progressed.

The Coco Cay and other Out Island ports in The Bahamas were 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.



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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 - November [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	184,204	5,684	3140.7%	68,826	5,075	1256.2%
Grand Bahama	11,396	900	1166.2%	2,039	635	221.1%
Abaco	20,508	1,454	1310.5%	3,965	1,359	191.8%
Andros	1,255	564	122.5%	1,252	564	122.0%
Berry Islands	102,305	681	14922.8%	690	518	33.2%
Bimini	16,659	992	1579.3%	880	252	249.2%
Cat Cay	954	496	92.3%	577	316	82.6%
Cat Island	150	63	138.1%	150	63	138.1%
Eleuthera	15,251	1,522	902.0%	5,961	1,501	297.1%
Exuma	5,644	817	590.8%	5,539	795	596.7%
Half Moon Cay	24,085	-	up	-	-	0.0%
Inagua	88	72	22.2%	42	58	-27.6%
Long Island	320	136	135.3%	294	136	116.2%
San Salvador	887	-	up	13	-	up
Bahamas Overall	383,706	13,381	2767.5%	90,228	11,272	700.5%

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 - November 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	884,145	894,268	-1.1%	560,039	305,106	83.6%
Grand Bahama	72,965	111,350	-34.5%	17,448	10,446	67.0%
Abaco	70,431	80,913	-13.0%	40,629	10,066	303.6%
Andros	11,010	4,431	148.5%	10,820	4,366	147.8%
Berry Islands	222,136	331,335	-33.0%	9,490	5,450	74.1%
Bimini	109,151	81,302	34.3%	10,230	4,775	114.2%
Cat Cay	7,276	5,433	33.9%	3,692	2,334	58.2%
Cat Island	1,571	584	169.0%	1,567	561	179.3%
Eleuthera	70,743	106,346	-33.5%	57,433	21,570	166.3%
Exuma	54,651	19,202	184.6%	53,853	18,843	185.8%
Half Moon Cay	77,203	120,417	-35.9%	-	-	0.0%
Inagua	1,528	699	118.6%	613	388	58.0%
Long Island	2,472	882	180.3%	2,002	822	143.6%
San Salvador	5,225	3,679	42.0%	293	3,593	-91.8%
Bahamas Overall	1,590,507	1,760,841	-9.7%	768,109	388,320	97.8%

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%
June	135,092	3,935	3333.1%	113,189	1,705	6538.7%
July	183,580	23,820	670.7%	133,929	15,355	772.2%
August	189,966	5,385	3427.7%	86,185	3,293	2517.2%
September	158,660	5,016	3063.1%	43,348	3,154	1274.4%
October	260,942	7,666	3303.9%	56,875	5,502	933.7%
November	383,706	13,381	2767.5%	90,228	11,272	700.5%
Grand Total	1,590,507	1,760,841	-9.7%	768,109	388,320	97.8%

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—November



Total Arrivals
0.50M

Return Visits
278K

Average Visits
1.1

Average Stay (nights)
7.0

Clear filters

Arrival Year

- 2021
- 2020
- 2019
- 2018
- 2017

Arrival Month

- Aug
- Sep
- Oct
- Nov
- Dec

Country (of residence)

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

Visitor Type

- Stop Over

Region



USA



Canada



Europe

Visitor Concentration by Country (of residence)




Total Arrivals by Country (of residence)

Region	2021	2020	2019	2018	2017	2016	Total
USA	64,136	5,868	84,615	93,685	73,056	70,341	391,701
Canada	2,708	223	11,298	10,976	9,488	9,245	43,938
Europe	2,492	320	9,121	10,264	8,779	7,447	38,423
Latin America	1,073	206	1,830	1,783	3,692	2,083	10,667
The Caribbean	639	95	1,392	1,364	1,564	1,647	6,701
Asia	242	32	847	940	679	622	3,362
Australasia	102	41	308	366	344	375	1,536
Africa	141	70	272	187	270	168	1,108
Middle East	71	7	125	118	94	124	539
Non response	1	74	24	96	241	73	509
Total	71,605	6,936	109,832	119,779	98,207	92,125	498,484



All Stopover Arrivals—November YTD



Regions

Clear filters

Arrival Year

- 2021
- 2020
- 2019
- 2018
- 2017

Arrival Month

- Aug
- Sep
- Oct
- Nov
- Dec

Country (of residence)

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

Total Arrivals

7.06M

Return Visits

4M


Average Visits

1.3


Average Stay (nights)

6.7


Region




USA




Canada




Europe



Latin America

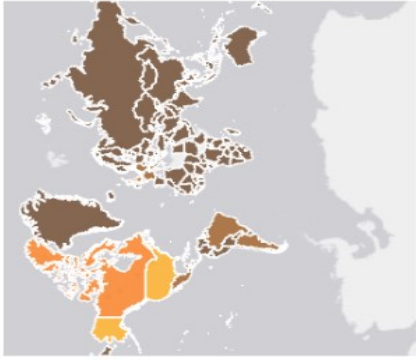


The Caribbean



Asia

Visitor Concentration by Country (of residence)



Total Arrivals by Country (of residence)

Region	2021	2020	2019	2018	2017	2016	Total
USA	753,706	350,771	1,355,124	1,178,567	1,044,673	1,085,499	5,76
Canada	9,009	42,549	120,282	111,136	97,608	113,137	49
Europe	15,026	24,767	109,705	110,209	105,341	99,232	46
Latin America	13,502	7,349	32,210	31,363	31,328	35,980	15
The Caribbean	6,209	3,495	20,320	19,578	19,361	20,257	8
Asia	1,427	1,935	10,716	11,229	9,472	6,949	4
Australasia	863	1,166	4,496	4,512	5,090	4,924	2
Africa	1,708	1,113	3,115	2,574	2,673	2,317	1
Middle East	791	415	2,025	2,367	1,927	1,933	
Non response	189	1,058	821	1,805	1,987	788	
Total	802,430	434,618	1,658,814	1,473,340	1,319,460	1,371,016	7,05

