### Tourism Statistical Review

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### October 2021

Bahamas Ministry of Tourism & Aviation



### In October 2021:

- Air & sea arrivals were significantly up over 1000% for the month and down 30.9% 2021 YTD compared to 2020.
- Stopover arrivals were up by 720.6% for the month, and up 67.3% 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 66.5% by October 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.

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### Total Visitor Arrivals

In October 2021, The Bahamas received **260.9K** foreign air and sea arrivals, an increase of over 1000 percent relative to October 2020. Foreign <u>air</u> arrivals to The Bahamas as a whole increased by 933.7% and stood at **56.9K**. 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 October 2021.

Air arrivals to The Bahamas were up significantly between October 2020 and October 2021 as they climbed back up. This increase was seen in all the following islands: Abaco, Andros, Bimini, Cat Island, Eleuthera, Exuma, Grand Bahama, Long Island, Nassau/Paradise Island. Club Med was still closed on San Salvador.

In October 2021, stopover arrivals to the Out Islands were up during the month compared to the same

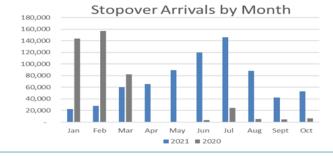
period of 2020 as visitors flocked to these islands. Stopover arrivals were up in Andros, Berry Islands, Bimini, Exuma, Harbour Island, and Long Island

By the end of October 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 October 2021. Hotel Occupancy for these large hotels in October 2021 was 36.7% although one properties had occupancies above 60% during the month.

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



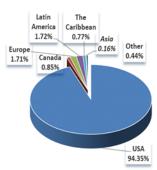
### Stopover Arrivals (October YTD)

From January to October 2021, The Bahamas received **715.5K** stopovers, up 67.3% compared to the same period in 2020.

This reflects increases in stopovers from the United States (up 95.7%), Latin America (up 72.4%), Caribbean (up 61.8%), Africa (up 48.7%), and the Middle East (up 71.1%), and decreases in Canada (down 85.6%), Europe (down 50.0%), Asia (down 39.5%), Australasia (down 34.0%) for January

to October YTD.

For October YTD, 94.3% (675.0K) of stopover visitors originated from the United States, while 1.72% (12.3K) originated from Latin America, 1.71% (12.2K) from Europe, 0.9% (6.1K) from Canada, 0.8% (5.5K) from the Caribbean, and 0.6% (4.3K) from the rest of the world.



Source Regions 2021 YTD

### North American Arrivals

## 70,000 60,000 50,000 40,000 20,000 10,000 0 USA Canada

### **United States**

In October 2021, **47.3k** stopover arrivals were received from the United States, an increase of 745.0% compared to October 2020.

In this regard, arrivals from all sales territories across the US increased, including: Florida (322.1%), the Northeast (over 1000%), the Midwest (over 1000%), and Southeast (919.9%).

In October 2021 YTD the top 10 producing states were Florida (up 154.2%), New York (up 68.0%), Texas (up 171.2%), New Jersey (up 128.0%), Cali-

fornia (up 154.5%), Georgia (up 163.8%), North Carolina (up 116.8%), Pennsylvania (up 53.6%), Massachusetts (up 0.3%), and Virginia (up 79.5%).

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

### Canada

In October 2021, 1.3K stopover

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

In October 2021 YTD, the top five producing provinces for stopovers were: Ontario (down 86.3%), Quebec (down 87.1%), Alberta (down 81.6%), British Columbia (down 83.6%), and Manitoba (down 77.7%).

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

In October, European
arrivals were up
tremendously for the
month but down
50.0% October YTD.

### European Arrivals

In October 2021, 1.8K stopover arrivals were received from European countries and were up by 921.8% compared to October 2020.

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

(over 1000%); Germany, covering Central and Eastern Europe; (553.9%) and France, covering Spain, Belgium, Portugal, Luxembourg, Monaco and Andorra (over 1000%).

By the end of October 2021 YTD, the top ten producing countries for stopover visitors were: the United Kingdom (down 44.6%), France (down 72.1%), Germany (down 60.6%), Switzerland (down 20.7%), Italy (down 64.0%), Spain (down 3.9%), Netherlands (down 4.6%), Russia (down 34.3%), Romania (down 54.0%) and Poland (down 72.3%).

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

### Latin American & Caribbean Arrivals

## 1,600 1,400 1,200 1,000 800 600 400 200 0 Latin America The Caribbean

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### Latin America

In October 2021, 1.5K stopover arrivals were received from Latin American countries an increase of 595.0% compared to October 2020.

By the end of October YTD the top ten producing countries for stopover visitors during the period were: Mexico (+147.6%), Brazil (+59.9%),Columbia (+115.6%), Argentina (-25.6%), Peru (+120.8%), Panama (+106.0%), Chile (+36.5%), Ven-(+83.7%), Ecuador ezuela (+68.5%),and Guatemala (+89.3%).

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

### The Caribbean

In October 2021, stopover arrivals received from Caribbean countries increased by 701.2% compared to October 2020.

By the end of October YTD, the top producing countries for stopover visitors from the Caribbean were: Jamaica (+91.8%), Puerto Rico (+175.8%), Turks and Caicos (+115.7%), Dominican Republic (+149.2%), Cuba (+135.6%), Bermuda (+19.4%), Cayman Islands (-41.4%), Trinidad and Tobago (-60.1%), Guyana (+78.0%), and Barbados (-45.0%).

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

### Arrivals from the Rest of the World

### Asia

In October 2021, stopover arrivals received from Asian countries saw an increase of 396.3% compared to October 2020. A small amount of Asian visitors were received by October 2021 YTD, a -39.5% decrease from the same period in 2020.

The top producing countries for stopover visitors for October 2021 YTD were: Philippines (up 32.4%), India (down 21.1%), China (down 87.4%) Hong Kong (down 14.1%), Japan (down 71.0%), Indonesia (down 39.2%) and South Korea (down 76.6%).

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

### Australasia

In October 2021, a small

amount of stopover arrivals were received from Australasian countries, but it saw a +30.3% increase compared to October 2020.

The top producing countries for stopover visitors in October 2021 YTD declined by 34.0% compared to the same period of 2020. The two top countries from the region were down Australia (-41.3%) and New Zealand (-8.3%).

### Africa

In October 2021, stopover arrivals received from African countries saw an increase of 1.4% compared to October 2020.

The top producing countries for stopover visitors for October YTD 2021 were: South Africa (+53.5%), Nigeria(+207.1%), Kenya(0%), Ghana(+144.4%), and Burkina Faso (+260%).

The top producing cities were: Cape Town (+80.8%), Durban (+38.2%), Johannesburg (-1.0%), Pretoria (+61.1%), Port Elizabeth (+121.4%), George (+244.4%), and Knysna (+35.0%).

### Middle East

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

The top producing countries for stopover visitors for October 2021 YTD were: Israel (up 114.1%), United Arab Emirates (up 47.5%), and Qatar (up 200%).

The top producing cities were: Dubai (+79.2%), Doha (+184.6%), Jaffa (+450%), Tel-Aviv-Yafo, Jerusalem (69.2%) and Haifa (+200.0%).

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

### Visitor Arrivals By Island

In October 2021, stopovers to The Bahamas overall were up (+720.6%) compared to October 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 (+396.0%), Grand Bahama (+416.0%), and Harbour Island Eleuthera (+650.0%), Andros (+65.9%) and the Berry Islands (+55.3%).

During the <u>month</u>, stopover visitor arrivals were down for San Salvador (-13.9%).

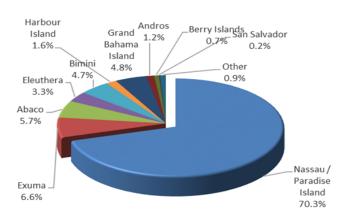
From January to October 2021 the following islands experienced increases in stopover visitors: Nassau/Paradise Island received

503.3K stopover visitors, an increase of 57.8%. Grand Bahama (+63.2% 34.1K). Abaco to to 40.6K), (+161.2% Andros (+118.3% to 8.8K), Berry Islands (+176.7% to 4.9K), Bimini (+151.8% to 33.5K), Mainland Eleuthera (+62.7% to 23.8K), Harbour Island Eleuthera (+93.7% to 11.5K), and Exuma (+89.1% to 47.3K stopovers).

During the period, stopover declines were noted on San Salvador (-68.2% to 1.6K).

In October YTD 2021, Nassau was the top island destination for visitors from all source markets, receiving 70.3% of stopover arrivals, followed by Exuma (6.6%), Abaco (5.7%), Total Eleuthera 4.9% (i.e. mainland Eleuthera 3.3% and Harbour Island 1.6% of the market share of stopovers),

Grand Bahama Island (4.8%), and Bimini (4.7%).



STOPOVER ARRIVALS BY ISLAND YTD 2021

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### Travel Trends

From January to October 2021, the average length of stay of stopover visitors to The Bahamas was 6.8 nights with 58.2% staying 4 to 7 nights, 19.4% staying 2 to 3 nights, 11.8% staying 8 to 14 nights and 2.8% staying 22-90 nights.

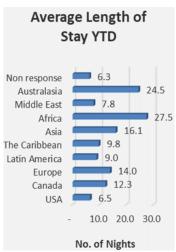
Among the main source markets not including Africa (27.5 nts.) visitors from Australasia (24.5 nts.), Asia (16.1 nts.), Europe (14.0 nts.), the Caribbean (9.8 nts.), and Latin America (9.0 nts.), stayed the longest on average, compared to an average stay of 6.5 nights for US visitors.

During this period, 46.8% 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 (61.1%), Canada (57.7%), USA (46.9%), Europe (43.0%) and the Caribbean (44.8%). The region with the lowest repeat visitor rate in the period was The Middle East (24.5%).

During the period, 69.9% of all stopover visitors came to The Bahamas primarily for a vacation, with 13.0% coming for weddings and honeymoons, and 2.5% for business.

Roughly nine in ten (86.6%) visitors stayed in hotels, 4.0% in vacation rentals/apartments or villas, 3.7% 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 40.4 years, with 43.4% of all visitors being between the ages of 25 and 54 years. As such, Generation X and Millennials accounted for 23.1% and 22.4% of visitors, respectively, followed by Post-Millennials (19.1%) and Baby Boomers (13.9%).



### Mode of Arrival

From January to October 2021 YTD, 70.2% of stopover visitors to The Bahamas arrived by commercial airline, 19.5% by private plane, 5.7% 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 (73.8%), private planes (19.1%) and private yachts (4.2%); Europe were commercial airlines (69%), private planes (19.3%)and private yachts (6.7%);Latin America were commercial airlines (62.4%)private planes (26.9%) and yachts/boats (4.6%); The Caribbean were commercial airlines (65.4%), private planes (25.1%) and private yacht/boat (2.8%); Africa were commercial airlines (42.7%).private vacht/boat (36.2%), and private planes (8.5%); Australasia were commercial airlines (50.2%), private yacht/boat (26.2%), and private plane (12.9%); Asia were commercial airlines (62.2%), private planes (20.7%) and yachts/boats (7.7%).

### Airlift

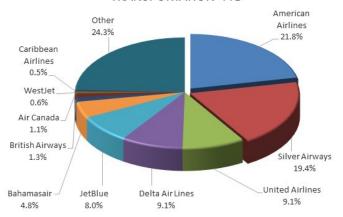
In October YTD, the top ten commercial airlines were: American Airlines, Silver Airways, United Airlines, Delta Air Lines, JetBlue, Bahamasair, British Airways Air Canada, and WestJet.

For the US October YTD, Silver Airways delivered the most stopover visitors from the Northeast (39.5K) followed by American Airlines (38.9K), and United Airlines (36.1K). American Airlines delivered the most visitors from the Midwest (56.9K), followed by Silver Airways (31.4K) and United Airlines (23.1K). Silver Airways delivered the most visitors from Florida (34.5K), followed by American Airlines (22.3K) and Bahamasair (20.8K). Of the commercial airlines, American Airlines delivered the most visitors from the Southeast (24.2K), followed by Silver Airways (21.5K), and Delta Airlines (20.9K). For Canada YTD, Air Canada delivered the

most stopover visitors followed by Westjet 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 October
YTD 2021,
13.0% of
stopover visitors
came to The
Bahamas
primarily for
weddings and
honeymoons.

### COMMERCIAL AIRLINES AND OTHER TRANSPORTATION YTD



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

### Cruise Arrivals

In October 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 October YTD 2021 were still down by 66.5% but Royal Caribbean Cruise lines, Carnival, Celebrity, Disney, MSC Cruises, Norwegian, had once again resumed service to The Bahamas after more than a year of ab-

sence due to the global 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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www.bahamas.com www.tourismtoday.com 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 - October [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	140,581	2,359	5859.3%	44,083	1,995	2109.7%
Grand Bahama	13,996	476	2840.3%	1,407	228	517.1%
Abaco	10,858	810	1240.5%	2,331	744	213.3%
Andros	844	412	104.9%	842	412	104.4%
Berry Islands	43,462	622	6887.5%	540	543	-0.6%
Bimini	19,786	780	2436.7%	697	169	312.4%
Cat Cay	398	1,154	-65.5%	211	387	-45.5%
Cat Island	80	46	73.9%	80	46	73.9%
Eleuthera	5,568	524	962.6%	2,390	504	374.2%
Exuma	4,267	365	1069.0%	4,203	361	1064.3%
Half Moon Cay	20,993	-	up	-	-	0.0%
Inagua	54	93	-41.9%	41	88	-53.4%
Long Island	50	22	127.3%	48	22	118.2%
San Salvador	5	3	66.7%	2	3	-33.3%
Bahamas Overall	260,942	7,666	3303.9%	56,875	5,502	933.7%

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 - October YTD [first port of entry only]

	2021	2020	2021/2020	2021	2020	2021/2020
	Air and Sea		% Chg Air/Sea	Air (	% Chg Air	
Nassau/Paradise Island	699,941	888,584	-21.2%	491,213	300,031	63.7%
Grand Bahama	61,569	110,450	-44.3%	15,409	9,811	57.1%
Abaco	49,923	79,459	-37.2%	36,664	8,707	321.1%
Andros	9,755	3,867	152.3%	9,568	3,802	151.7%
Berry Islands	119,831	330,654	-63.8%	8,800	4,932	78.4%
Bimini	92,492	80,310	15.2%	9,350	4,523	106.7%
Cat Cay	6,322	4,937	28.1%	3,115	2,018	54.4%
Cat Island	1,421	521	172.7%	1,417	498	184.5%
Eleuthera	55,492	104,824	-47.1%	51,472	20,069	156.5%
Exuma	49,007	18,385	166.6%	48,314	18,048	167.7%
Half Moon Cay	53,118	120,417	-55.9%	-	-	0.0%
Inagua	1,440	627	129.7%	571	330	73.0%
Long Island	2,152	746	188.5%	1,708	686	149.0%
San Salvador	4,338	3,679	17.9%	280	3,593	-92.2%
Bahamas Overall	1,206,801	1,747,460	-30.9%	677,881	377,048	79.8%

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%	
<b>Grand Total</b>	1,206,801	1,747,460	-30.9%	677,881	377,048	79.8%	

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—October



# All Stopover Arrivals—October YTD

