

## FOREIGN AIR AND SEA ARRIVALS 2017 VS 2016

The natural disasters that hit the Bahamas in 2016 and 2017 did impact foreign air and sea arrivals into the destination. Foreign air and sea arrivals to the Bahamas were down for 1<sup>st</sup> Qtr. (-2.2%), 2<sup>nd</sup> Qtr. (-1.7%) and 3<sup>rd</sup> Qtr. 2017 (-12.9%, Hurricane Irma passed through in Sept.), but began to look up for 4<sup>th</sup> Qtr. 2017. In 4<sup>th</sup> qtr. 2017, the foreign arrivals were up by 8.4% but this increase was not enough to counteract the decline in arrivals that had already occurred in the 1<sup>st</sup> three quarters of the year and arrivals to the destination declined by -2.1%.

### FOREIGN AIR AND SEA ARRIVALS TO THE BAHAMAS 1ST PORT OF ENTRY ONLY JANUARY TO DECEMBER 2017

	Air and Sea Arrivals				Air Arrivals Only			
	2017	2016	2015	%Chg 17/16	2017	2016	2015	%Chg 17/16
January	509,343	534,343	570,466	-4.7%	94,318	95,879	101,703	-1.6%
February	534,581	571,217	550,192	-6.4%	108,208	120,461	116,700	-10.2%
March	682,740	659,350	651,544	3.5%	146,023	168,164	157,559	-13.2%
April	582,293	595,578	559,479	-2.2%	138,075	133,390	135,307	3.5%
May	469,044	487,615	469,375	-3.8%	114,422	121,547	117,571	-5.9%
June	492,688	488,038	477,591	1.0%	134,175	142,509	132,138	-5.8%
July	544,203	576,337	512,215	-5.6%	144,634	158,575	147,190	-8.8%
August	476,983	500,799	452,642	-4.8%	110,072	116,002	115,570	-5.1%
September	246,568	378,496	369,743	-34.9%	42,672	70,070	67,962	-39.1%
October	431,474	330,522	370,526	30.5%	68,923	55,812	80,249	23.5%
November	556,641	536,336	542,198	3.8%	100,811	88,071	95,649	14.5%
December	609,601	606,388	586,122	0.5%	133,600	121,333	123,313	10.1%
<b>Grand Total</b>	<b>6,136,159</b>	<b>6,265,019</b>	<b>6,112,093</b>	<b>-2.1%</b>	<b>1,335,933</b>	<b>1,391,813</b>	<b>1,390,911</b>	<b>-4.0%</b>

Hurricane Matthew passed through the Islands of the Bahamas between Oct. 5-8, 2016. Easter fell in April 2015, March 2016 and April 2017

In 2017, the Easter holiday fell in April. In 2016, the Easter Holiday Weekend fell in March instead of April. In 2015, the Easter holiday fell in April.

Hurricane Joaquin passed through the islands of the Bahamas in October 2015. Hurricane Matthew passed through New Providence, Grand Bahama, and some of the other islands of the Bahamas between October 5-8, 2016 and caused hotel closures in Nassau/P.I., Grand Bahama Isl., Exuma and other islands.

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

The Bahamas experienced a slow start in January 2017 with foreign arrivals into the destination. This slow start continued into the month of September (with the exceptions of March and June). One of the major reasons for the slow start came in the form of Hurricane Matthew which slammed into the Islands of the Bahamas between October 5-8, 2016 and left major devastation in its wake in some of the islands. The effects of Hurricane Matthew carried over into November and December 2016, but that was not the end of its reach. The devastation left by Hurricane Matthew caused a negative ripple effect into the foreign air and sea arrivals of 2017. Hurricane Matthew caused hotel closures in Nassau/P.I., Grand Bahama Isl., Exuma, and other islands in 2016 and into 2017. The One and Only Ocean Club on Paradise Island closed for repairs as a result of Hurricane Matthew and did not reopen until February 2017.

After the slow start in 2017 with foreign air and sea arrivals, business finally picked up in the 4<sup>th</sup> qtr. of the year after Hurricane Irma had already slammed into the Southern Islands of the Bahamas. Hurricane Irma caused major devastation to some of the southern islands of the Bahamas namely Ragged Island, Inagua, Mayaguana, Acklins and Crooked Island (all islands that do not currently receive a heavy influx of visitors) but once again the Out Islands of the Bahamas were able to rebound quickly. The speed of recovery with arrivals from a major hurricane has

always depended largely on the islands that were hit and the infrastructural damage sustained to the tourist accommodations on each of the islands.

The increase in foreign arrivals to the Bahamas in 4<sup>th</sup> qtr. 2017 would have been in part due to the fact that many of the regional competitors of the Bahamas were impacted by Hurricane Irma, Hurricane Maria, or Hurricane Jose. All of these hurricanes caused major devastation to countries in the region. Many islands in the Caribbean were affected by at least one of these hurricanes and the countries least affected by these storms received additional business that may not have come their way if the hurricanes had not plowed through so many islands. The Dominican Republic, the biggest regional competitor of the Bahamas finished off the year with stopovers up by 3.8% because they had started the year off strong and had ended the year strong.<sup>1</sup> The 3<sup>rd</sup> biggest regional competitor of the Bahamas with stopovers, Puerto Rico, was bashed by Hurricane Maria which totally devastated the island; stopovers (based on non-resident hotel registrations only) to this island were down by -11% in 2017. The island of Jamaica (which was not hit by any of the hurricanes), the 4<sup>th</sup> biggest regional stopover competitor of the Bahamas finished off the year with stopovers up by 7.8% because they had started the year off strong and had ended the year strong.<sup>2</sup>

**FOREIGN AIR AND SEA ARRIVALS TO THE BAHAMAS**  
**1ST PORT OF ENTRY ONLY**  
**JANUARY TO DECEMBER 2017**


	2017	2016	2017/2016	2017	2016	2017/2016
	Air and Sea			Air Only		
			% Chg Air/Sea			% Chg Air
Nassau/Paradise Island	3,629,891	3,585,207	1.2%	979,843	1,016,311	-3.6%
Grand Bahama	614,570	836,756	-26.6%	70,692	125,784	-43.8%
Abaco	426,543	403,825	5.6%	103,598	93,838	10.4%
Andros	11,003	8,927	23.3%	10,727	8,705	23.2%
Berry Islands	572,187	561,215	2.0%	7,829	8,827	-11.3%
Bimini	107,258	115,377	-7.0%	30,403	28,458	6.8%
Cat Cay	12,743	14,158	-10.0%	4,795	5,138	-6.7%
Cat Island	1,050	600	75.0%	998	600	66.3%
Eleuthera	221,892	185,593	19.6%	48,746	39,248	24.2%
Exuma	61,906	51,037	21.3%	60,956	50,090	21.7%
Half Moon Cay	458,677	486,506	-5.7%	-	-	0.0%
Inagua	1,001	843	18.7%	114	95	20.0%
Long Island	1,322	1,345	-1.7%	1,263	1,237	2.1%
San Salvador	16,116	13,630	18.2%	15,969	13,482	18.4%
<b>Bahamas Overall</b>	<b>6,136,159</b>	<b>6,265,019</b>	<b>-2.1%</b>	<b>1,335,933</b>	<b>1,391,813</b>	<b>-4.0%</b>

Source: Immigration and Customs various ports of entry in the Bahamas, & Research and Statistics Dept. Ministry of Tourism  
Hurricane Irma which passed through the Bahamas in September 2017, caused tornados in Grand Bahama and Bimini. The tornadoes caused the temporary closure of a major property in Bimini because their marina was severely impacted.  
All numbers are subject to revision.

Although overall foreign air and sea arrivals to the Bahamas were down by -2.1% in 2017 compared to 2016 many of the Islands of the Bahamas experienced increases:

<sup>1</sup> Source: Caribbean Tourism Organization Monthly Statistics January 2018 (CTO)

<sup>2</sup> Source: Caribbean Tourism Organization Monthly Statistics January 2018 (CTO)

- **Air and sea arrivals were up in:** 
  - Nassau/Paradise Island (up 1.2%);
  - Abaco (up 5.6%);
  - Andros (up 23.3%);
  - Berry Islands (up 2.0%);
  - Cat Island (up 75%);
  - Eleuthera (up 19.6%);
  - Exuma (up 21.3%);
  - Inagua (up 18.7%);
  - San Salvador (up 18.2%);

After the world suffered the impacts of the financial meltdown of 2008, air arrivals to the Out Islands have grown consistently since 2009. Foreign air and sea arrivals to the Out Islands of the Bahamas were up as a whole by 2.6% in 2017 compared to 2016. Air arrivals to the Out Islands did especially well in 2017 and were up by 14.3% over 2016 despite the fact that the islands had been hit three years in a row by hurricanes. Hurricane Joaquin impacted some of the Out Islands in October 2015, Hurricane Matthew in October 2016, and Hurricane Irma in September 2017.

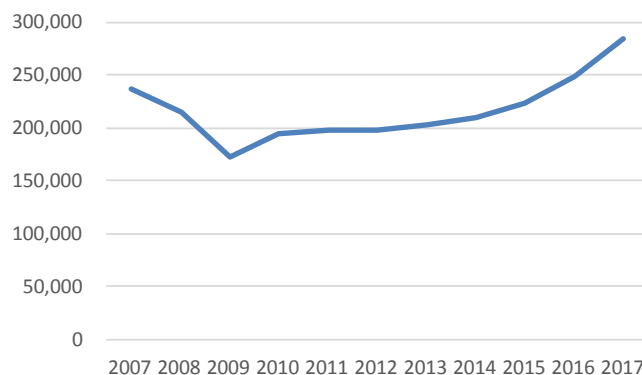
The growth in arrivals was due in part to the very high repeat visitor rate of approximately 66% enjoyed by the Out Islands in any given year. The Out Islands with their very unique product offerings have attracted a consistent barrage of repeat visitors for many years. The high repeat visitor rate to the Out Islands was prompted by second home owners that were very loyal to the destination. The growth in arrivals to the Out Islands were also spawned by a few very successful promotions like the 2 fly free campaigns that have been in place for a few years, and the \$300 Boating Fuel Credit, etc. offered to visitors that booked consecutive night stays in Out Island Promotion Board hotels. Air arrivals to the Out Islands as a whole on their current track are well on their way to climbing to new record highs in 2018.


**AIR ARRIVALS  
OUT ISLANDS OF THE BAHAMAS  
2007 to 2017**

2007	236,421
2008	215,241
2009	172,118
2010	194,895
2011	197,268
2012	198,471
2013	203,677
2014	209,764
2015	223,326
2016	249,718
2017	285,398

Source: Immigration, Research & Statistics Dept.

**Air Arrivals Trends Out Islands**



- **Air and sea arrivals were down in:** 
  - Grand Bahama (down -26.6%) Arrivals into Grand Bahama were greatly impacted by the closure of one of the signature properties on the island, the Memories Resort. The Memories Resort was closed permanently after Hurricane Matthew slammed into the island in October 2016;
  - Bimini (down by -7.0% but air arrivals by themselves were up by 6.8%);

- Cat Cay (down by -10%);
- Half Moon Cay (down by -5.7%) is a cruise port only;
- Long Island (down by -1.7% but air arrivals by themselves were up by 2.1%).

In 2017, foreign arrivals to Nassau/Paradise Island were able to pull off the year in a positive way primarily because both the sea landed (i.e. boaters/yachters primarily) and cruise arrivals to the island finished the year up over the same period of 2016 and these increases counteracted the decline in air arrivals to the island. In addition, air arrivals to Nassau/Paradise Island were up from October to December 2017 (4<sup>th</sup> Qtr.), in the last few months of the year. In 2017, several "new" hotels were open in Nassau/Paradise Island that were not open or in full operation in every month of 2016: the Courtyard Marriott, the Holiday Inn Express, the Warwick Resort (opened in late October 2016), and the Baha Mar properties (the Grand Hyatt which opened softly in April 2017 and the SLS which softly opened in November 2017). These hotels would have attracted visitors to their properties.

### **FOREIGN AIR AND SEA ARRIVALS JANUARY 2018 VS 2017**

#### **FOREIGN AIR AND SEA ARRIVALS TO THE BAHAMAS 1ST PORT OF ENTRY ONLY JANUARY 2018**

	2018	2017	2018/2017	2018	2017	2018/2017
	Air and Sea			% Chg Air/Sea		
Nassau/Paradise Island	309,845	304,824	1.6%	76,418	70,791	7.9%
Grand Bahama	73,282	51,794	41.5%	5,046	6,168	-18.2%
Abaco	29,269	49,260	-40.6%	5,938	5,350	11.0%
Andros	738	583	26.6%	731	557	31.2%
Berry Islands	32,327	32,945	-1.9%	553	520	6.3%
Bimini	4,214	6,806	-38.1%	1,823	1,577	15.6%
Cat Cay	283	525	-46.1%	169	225	-24.9%
Cat Island	60	55	9.1%	60	48	25.0%
Eleuthera	33,515	17,916	87.1%	3,548	3,072	15.5%
Exuma	4,877	4,589	6.3%	4,785	4,509	6.1%
Half Moon Cay	43,419	38,456	12.9%	-	-	0.0%
Inagua	106	65	63.1%	8	5	60.0%
Long Island	94	47	100.0%	94	42	123.8%
San Salvador	1,703	1,478	15.2%	1,703	1,454	17.1%
<b>Bahamas Overall</b>	<b>533,732</b>	<b>509,343</b>	<b>4.8%</b>	<b>100,876</b>	<b>94,318</b>	<b>7.0%</b>



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

In 2017, the Easter Holiday fell in April instead of in March. In 2016, the Easter Holiday fell in March.

All numbers are subject to revision.

Foreign air and sea arrivals were up by 8.4% in the last qtr. of 2017. Usually when the year ends well like it did in the last quarter of 2017 it is a good barometer of how the upcoming year will perform barring any natural disasters.

In January 2018, foreign air and sea arrivals to the Bahamas were up by 5%. Air arrivals during the month also performed well and were up by 7%. Foreign arrivals were up in many Islands of the Bahamas in January 2018:

- **Foreign air and sea arrivals were up in:** 
  - Nassau/Paradise Island (up 1.6%);
  - Grand Bahama (up 42.0%, Grand Bahama arrivals were up so significantly because of the amount of cruise visitors brought in by Carnival Cruises and Royal Caribbean International. Royal Caribbean began service into Grand Bahama again in 2015 after a long absence from that island. Air arrivals to the island were down though by -18.2%);
  - Andros (up 26.6%);
  - Cat Island (up 9.1%);
  - Eleuthera (up 87.1%);
  - Exuma (up 6.3%);
  - Half Moon Cay (up 12.9%);
  - Inagua (up 63.1%);
  - Long Island (up 100%);
  - San Salvador (up 15.2%).
  
- **Air and sea arrivals were down in:** 
  - Abaco (down by -40.6%), but air arrivals alone were up by 11% on the island. Total arrivals to Abaco were down in January 2018 because Disney Cruise Lines brought in fewer cruise visitors to Castaway Cay as a first port of call than they had in the same period of 2017;
  - Berry Islands (down -1.9%) but air arrivals by themselves were up by 6.3% on the island;
  - Bimini (down by -38.1% but air arrivals by themselves were up by 15.6%);
  - Cat Cay (down by -46.1%);

**NASSAU AND PARADISE ISLAND SELECT LARGE HOTELS PERFORMANCE  
PRELIMINARY STATISTICS 2017-2016**

	Occupancy		ADR		RevPar		Room Revenue	Nassau/P.I. Air Arrivals	Room Nights Sold
	2017	2016	2017	2016	2017	2016	% Chg 17/16	% Chg 17/16	% Chg 17/16
Jan	61.7%	63.1%	\$208.77	\$ 248.40	\$ 128.81	\$ 156.67	-16%	-1%	0%
Feb	67.2%	73.7%	\$232.63	\$ 248.95	\$ 156.38	\$ 183.47	-15%	-11%	-9%
Mar	76.5%	84.4%	\$287.73	\$ 316.85	\$ 220.17	\$ 267.32	-15%	-14%	-6%
Apr	75.6%	81.1%	\$282.84	\$ 258.74	\$ 213.71	\$ 209.92	6%	1%	-3%
May	58.7%	71.8%	\$212.53	\$ 210.69	\$ 124.69	\$ 151.23	-4%	-7%	-5%
Jun	65.3%	75.7%	\$237.76	\$ 231.08	\$ 155.16	\$ 174.82	-4%	-4%	1%
Jul	73.5%	83.8%	\$251.59	\$ 247.72	\$ 185.01	\$ 207.47	3%	-5%	1%
Aug	65.2%	70.0%	\$223.54	\$ 225.82	\$ 145.72	\$ 158.00	2%	-1%	3%
Sep	31.8%	45.8%	\$156.09	\$ 170.05	\$ 49.63	\$ 77.88	-26%	-32%	-20%
Oct	45.0%	41.8%	\$174.05	\$ 172.50	\$ 78.38	\$ 72.15	22%	19%	21%
Nov	57.1%	57.9%	\$216.29	\$ 206.33	\$ 123.50	\$ 119.46	18%	10%	13%
Dec	54.4%	60.3%	\$302.17	\$ 279.17	\$ 164.52	\$ 168.33	28%	8%	18%
<b>YTD</b>	<b>60.7%</b>	<b>67.5%</b>	<b>\$239.17</b>	<b>\$ 241.09</b>	<b>\$ 145.28</b>	<b>\$ 162.84</b>	<b>0%</b>	<b>-4%</b>	<b>1%</b>

Hurricane Matthew passed through the Islands of the Bahamas between October 5 to 8, 2016 and did cause hotel closures in Nassau/P.I. & other Islands.

One of the large Paradise Island hotels was closed in November for repairs after Hurricane Matthew and this greatly affected the room revenue for the overall group. This hotel was still closed in January 2017 for renovations; this closure contributed significantly to the decline in room revenue for the group of hotels. In February 2017, this hotel re-opened but did not operate with a full complement of rooms. In March 2017, this hotel operated with the same amount of available rooms as they had in the same period of 2016. Easter which is normally a big month for travel to the Bahamas occurred in the month of April 2017. The Warwick Paradise Island was not open in January thru August 2016. Sandals was closed from August 15, 2016 until October 24, 2016, but they were open in August to October 2017. RIU was closed for renovations August 2017 and did not reopen until the end of October. Hurricane Irma caused the Lynden Pindling Airport to be closed for September 8 and 9th, 2017. Includes Baha Mar and Atlantis properties.

*This report is based on information from the Department of Immigration, the Customs Department, Port Authorities, CTO, and the Research and Statistics Department (Exit Surveys, Tourism in the Islands of the Bahamas Report), large hotels. In addition, information from other sources are included in this report and stated in the footnotes on each page. Stopover visitor information for 2017 is not included in this report for the Bahamas because it was not available at the time of this report.*

*If you have any questions regarding this report, please contact the writer:*

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