

FEBRUARY 2019 VS 2018

FOREIGN AIR AND SEA ARRIVALS TO THE BAHAMAS 1ST PORT OF ENTRY ONLY JANUARY TO FEBRUARY

	Air and Sea Arrivals			Air Arrivals Only		
	2019	2018	%Chg 19/18	2019	2018	%Chg 19/18
January	636,881	533,732	19.3%	129,912	100,876	28.8%
February	608,371	534,155	13.9%	151,136	126,315	19.7%
Grand Total	1,245,252	1,067,887	16.6%	281,048	227,191	23.7%

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

- Foreign air and sea arrivals to the Bahamas were up by 16.6% between January to February 2019 compared to the same period of 2018.
- Foreign air arrivals by themselves were up by 23.7% between January to February 2019 compared to the same period of 2018.

FOREIGN AIR AND SEA ARRIVALS TO THE BAHAMAS 1ST PORT OF ENTRY ONLY JANUARY TO FEBRUARY 2019

	2019	2018	2019/2018	2019	2018	2019/2018
	Air and Sea			Air Only		
			% Chg Air/Sea			% Chg Air
Nassau/Paradise Island	761,930	581,478	31.0%	216,958	169,783	27.8%
Grand Bahama	96,590	134,726	-28.3%	12,577	11,645	8.0%
Abaco	83,915	68,645	22.2%	17,084	14,749	15.8%
Andros	1,422	1,723	-17.5%	1,396	1,684	-17.1%
Berry Islands	94,407	89,322	5.7%	1,387	1,149	20.7%
Bimini	11,913	11,720	1.6%	2,789	4,465	-37.5%
Cat Cay	1,316	1,167	12.8%	543	588	-7.7%
Cat Island	165	147	12.2%	153	147	4.1%
Eleuthera	90,556	72,894	24.2%	11,318	8,891	27.3%
Exuma	12,967	10,557	22.8%	12,835	10,420	23.2%
Half Moon Cay	85,840	91,321	-6.0%	-	-	0.0%
Inagua	210	514	-59.1%	95	15	533.3%
Long Island	217	259	-16.2%	199	253	-21.3%
San Salvador	3,804	3,414	11.4%	3,714	3,402	9.2%
Bahamas Overall	1,245,252	1,067,887	16.6%	281,048	227,191	23.7%

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

All numbers are subject to revision.

- Foreign air and sea arrivals were up in both January and February 2019 compared to the same period of 2018. Foreign arrivals (1st port of entry) were up in the following islands: Nassau/Paradise Island, Abaco, Berry Islands, Bimini, Cat Cay, Cat Island, Eleuthera, Exuma, and San Salvador between January to February 2019.
- Foreign arrivals to the island of Bimini can easily travel to the destination by air transportation, boat/yacht or by a convenient ferry/cruise ship service. Because of the ferry service going into Bimini, many of the visitors to the island appear to prefer this form of transportation to get to the island over travelling by air. The ferry service brings in stopover visitors, cruise visitors and residents. When the ferry service to the island was not operational for a period, air arrivals to Bimini increased significantly because visitors had fewer options to get to the island but when this sea transportation service is available visitors appear to relish the chance to arrive by sea.

Most Islands of the Bahamas experienced increases in foreign arrivals by the end of February 2019:

ISLANDS UP 2019 YTD

- Foreign Arrivals to Nassau/Paradise Island were up 31% between January to February 2019 YTD, and air arrivals by themselves to the island were up by 27.8%. Air arrivals to Nassau/P.I. were up in every month of 2018 compared to 2017, and this trend continued into February 2019. One of the major reasons for this increase in air arrivals to Nassau/Paradise Island was due in part to the opening of new resorts on the island in 2017 and 2018 which increased room inventory on the island. The increase in air arrivals to the island was also due in part to the “solid” performance made by the other large hotels on the island which attracted business to their properties. Air arrivals to Nassau/P.I. also increased significantly because of the stellar marketing efforts done by the Bahamas Ministry of Tourism, its Industry Partners and the hotels themselves;
- Out Islands up by 10.0%
Air arrivals to the Out Islands were strong in both January and February 2019 and sea arrivals were up for the period because of a strong January. Foreign arrivals were up for most of the islands between Jan. to Feb. 2019:
- Abaco up 22.2%;
- Berry Islands up 5.7%;
- Bimini up 1.6%;
- Cat Cay arrivals up 12.8%;
- Cat Island arrivals up 12.2%;
- Eleuthera up 24.2%
The increase in airlift to North Eleuthera would have been a major factor in the increase in air arrivals to the island as a whole; air arrivals grew by 27.3%. In addition, Carnival Cruises increased their calls on Princess Cay (Eleuthera) during the period;
- Exuma up 22.8%;
- San Salvador up 11.4%.

ISLANDS DOWN 2019 YTD

- Foreign arrivals to Grand Bahama were down by 28.3%, but air arrivals by themselves were up significantly by 8% between January to February 2019 YTD. Air arrivals to Grand Bahama have been trending up since May 2018 even though the island operated with a much lower hotel inventory than it had before Hurricane Matthew in 2016 impacted the resorts on the island. The closure of the Memories Resort in 2016 reduced the number of room nights available for sale & the number of rooms in inventory significantly.
 - Between January to February 2019 YTD overall arrivals to the island were dragged down compared to the same period of 2018 by the decline in cruise arrivals brought in by major cruise lines. Poor weather would have been partially responsible for this decline in cruise arrivals as ships to the island were re-routed or cancelled. The following cruise lines brought in fewer cruise visitors (1st port of entry) than in the previous period: Carnival Cruises (a decline of 31.6%), Bahamas Paradise Cruises (-17.7%), and Royal Caribbean Int’l (-83.0%). The number of cruise calls made on Grand Bahama between January to February 2019 did increase by 15.5%, however, these calls were made by smaller ships and were not enough to balance off the decline in calls made by the larger ships;
- Andros down 17.5%;
- Inagua was down 59.1%. In February 2018, the island received a cruise ship the M/S Hamburg which increased arrivals to the island significantly, this did not happen in the 1st two months of 2019;
- Long Island down 16.2%.
- Half Moon Cay down 6.0%.

FOREIGN AIR AND SEA ARRIVALS

FEBRUARY 2019 VS 2018

FOREIGN AIR AND SEA ARRIVALS TO THE BAHAMAS 1ST PORT OF ENTRY ONLY FEBRUARY 2019

	2019	2018	2019/2018	2019	2018	2019/2018
	Air and Sea		% Chg Air/Sea	Air Only		% Chg Air
Nassau/Paradise Island	359,228	271,633	32.2%	115,400	93,365	23.6%
Grand Bahama	47,756	61,444	-22.3%	6,795	6,599	3.0%
Abaco	44,185	39,376	12.2%	9,995	8,811	13.4%
Andros	806	985	-18.2%	793	953	-16.8%
Berry Islands	52,812	56,995	-7.3%	775	596	30.0%
Bimini	7,612	7,506	1.4%	1,824	2,642	-31.0%
Cat Cay	743	884	-16.0%	278	419	-33.7%
Cat Island	97	87	11.5%	92	87	5.7%
Eleuthera	51,669	39,379	31.2%	6,468	5,343	21.1%
Exuma	6,820	5,680	20.1%	6,760	5,635	20.0%
Half Moon Cay	34,572	47,902	-27.8%	-	-	0.0%
Inagua	123	408	-69.9%	62	7	785.7%
Long Island	126	165	-23.6%	114	159	-28.3%
San Salvador	1,822	1,711	6.5%	1,780	1,699	4.8%
Bahamas Overall	608,371	534,155	13.9%	151,136	126,315	19.7%

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 Arrivals to Bimini preferred to travel to the island by ferry/cruise ship when they could do so instead of by air, and for this reason air arrivals to the island were down significantly while sea arrivals to the island were up during the month. The ferry/cruise ship service into Bimini brought in both cruise visitors and sea landed arrivals (sbpovers). Sea Landed arrivals are not listed above.

- Foreign arrivals for the Bahamas Overall were up by 13.9% during the month of February 2019 compared to February 2018 and air arrivals by themselves were up by 19.7%.

ISLANDS UP FEBRUARY

- Foreign arrivals (1st port of entry) to Nassau/Paradise Island were up by 32.2% during the month of February 2019 compared to 2018. Arrivals to Nassau/Paradise Island increased significantly during the month of February because both air and sea arrivals to the island performed well. Air arrivals by themselves were up by 23.6% and sea arrivals were up by 36.8%. The significant increase in the sea arrivals to Nassau/P.I. was due to the fact that some of the cruise lines made more calls on this island as a 1st port of entry than they did on their private islands or Grand Bahama during the month. Carnival Cruises, Celebrity Cruises, Costa Cruises, Disney Cruises, Holland American Cruises, Norwegian Cruises and Royal Caribbean all significantly increased the number of calls that they made on Nassau/Paradise Island as a 1st port of entry in February 2019 compared to February 2018.
- Out Islands up by 0.2%,
Air arrivals to the Out Islands were strong in February 2019 (up by 9.8%), but the cruise arrivals as a 1st port of entry were weaker in the month of February because many of the cruise lines sent their ships to Nassau/Paradise Island 1st before traveling to the Out Islands. In some instances, poor weather caused them to switch their itinerary, and in other instances the cruise lines just had their original routes set up so that they would go the Out Islands after Nassau/Paradise Island.
- Abaco up 12.2%;
- Bimini up 1.4%;
- Cat Island up 11.5%;
- Eleuthera arrivals up 31.2% during the month. Air arrivals by themselves were up 21.1% because there was an increase in airlift into North Eleuthera from the US in 2018;
- Exuma up 20.1%;
- San Salvador up 6.5%.

ISLANDS DOWN FEBRUARY

- Grand Bahama arrivals down 22.3%, but air arrivals by themselves were up by 3%. The decline in foreign arrivals to Grand Bahama was due to a decline in cruise arrivals. Carnival Cruises, Bahamas Paradise Cruises, and Balearia Caribbean Cruise lines all reduced the number of cruise visitors that they brought into the destination in February 2019 compared to February 2018. Poor weather was partially responsible for the decline in cruise arrivals to the island during the month;
- Andros down 18.2%;
- Berry Islands down 7.3% but air arrivals to the island were up by 30%. Norwegian cruise lines significantly increased the number of calls to Nassau/Paradise Island as a 1st port of entry while they significantly decreased the number of calls to their private island Great Stirrup Cay, Berry Islands in February 2019 as a 1st port of call;
- Cat Cay down 16.0%;
- Half Moon Cay (cruise port only) down 27.8%;
- Inagua down 69.9%
In February 2018, the island received a cruise ship the M/S Hamburg which increased arrivals to the island significantly, this did not happen in February 2019;
- Long Island down 23.6%.

Air Arrivals February 2019

The first three quarters of 2017 were challenging because The Bahamas had been hit by a “monster” hurricane Matthew in October 2016. The effects of this hurricane of 2016 spilled into the first few quarters of 2017 as hotels all over the Bahamas including Nassau/Paradise Island scrambled to do repairs to their properties and recover from that devastating hit.

In the 3rd Qtr. of 2017, the Caribbean was plagued by Hurricanes Irma, Maria and Jose which left major devastation in every island that they had slammed into as they had traversed through the region. The Southern Bahamas was hit by Hurricane Irma, but Nassau/Paradise Island was spared a hit from all these powerful storms, so by the 4th Qtr. of 2017 the Bahamas was still open for business while many of its Caribbean neighbours were still recovering from devastating losses in hotel inventory and tourism related infrastructure. Many of these Caribbean neighbours temporarily lost room inventory for months as they recovered from the effects of these storms and logically their arrivals were temporarily disrupted.

Despite the passage of Hurricane Matthew in 2016, the Grand Hyatt, Baha Mar opened its doors to visitors in 2nd Qtr. 2017, although the hotel was not yet in full operation. In December 2017, the Grand Hyatt added the rest of its rooms into circulation, and in the 4th Qtr. of 2017, The SLS, Baha Mar opened its doors to the public. In the 3rd Qtr. of 2018 the Rosewood, Baha Mar came on stream and chugged along full speed ahead. The Baha Mar properties together added 2,173 rooms to the collective inventory for Nassau/Paradise Island by 2018. In addition to the Baha Mar properties, several other hotels came on stream in late 2016 and were in operation by 2017, 2018 and 2019: The Courtyard Marriot (183 rooms), The Holiday Inn Express (58 rooms) and the Warwick Resort (250 rooms). In addition to all these new hotels, the Atlantis collection of properties, and the All-Inclusive properties as a group, increased the amount of room nights sold in 2018, a trend that continued into February 2019.

Air arrivals to Nassau/Paradise Island began to soar in the last quarter of 2017, and this trend continued throughout 2018 and into February 2019. By the end of 2018, air arrivals to Nassau/Paradise Island were up by 19.2%.

In February 2019, air arrivals to Nassau/Paradise Island were up by 23.6% compared to February 2018 and by the end of February 2019 YTD, they were up by 27.8%. The air arrivals to Nassau/Paradise Island continued the upward trend that had begun in 2018 as they moved full speed ahead.

HOTEL PERFORMANCE LARGE HOTELS NASSAU/PARADISE ISLAND

In 2017, several "new" hotels were open in Nassau/Paradise Island that were not open or in full operation in every month of 2016: Courtyard Marriott, the Holiday Inn Express, the Warwick Resort (opened in late December 2016), and the Baha Mar properties (the Grand Hyatt which softly opened in April 2017 and the SLS which softly opened in December 2017). All of these hotels would have been in full operation in 2018 & in February 2019 and would have attracted visitors to their properties. The Rosewood, Baha Mar softly opened at the end of May 2018 and their numbers are also included in the aggregated numbers below.

NASSAU AND PARADISE ISLAND SELECT LARGE HOTELS PERFORMANCE PRELIMINARY STATISTICS 2019-2018

	Occupancy		ADR		RevPar		Room Revenue	Nassau/P.I. Air Arrivals	Room Nights Sold
	2019	2018	2019	2018	2019	2018	% Chg 19/18	% Chg 19/18	% Chg 19/18
Jan	69.9%	53.0%	\$ 265.39	\$ 242.54	\$ 185.55	\$ 128.64	48%	33%	36%
Feb	77.6%	63.0%	\$ 274.18	\$ 246.75	\$ 212.71	\$ 155.45	41%	24%	27%
YTD	73.6%	57.8%	\$ 269.79	\$ 244.72	\$ 198.45	\$ 141.36	44%	28%	31%

Source: Large Nassau/Paradise Island Hotels and Research & Statistics Dept. Ministry of Tourism

Hurricane Irma passed through the Southern islands of the Bahamas on September 8th, 2017. The Lynden Pindling Airport in Nassau in the Bahamas was closed on Sept. 8th and 9th in anticipation of the storm. Hurricane Irma passed through the Bahamas between September 8 to 11, 2017, although some airports in the Bahamas closed on the 7th in anticipation of the storm. Some islands like Grand Bahama and Bimini did not sustain direct hits from the hurricane but were severely affected by tornados that spun out as a result of Hurricane Irma as that storm approached Florida. Hurricane Maria passed close to the Southern Islands of the Bahamas and near the Turks and Caicos Islands on September 22, 2017. Hurricane Maria passed close to the Southern Islands of the Bahamas and near the Turks and Caicos Islands on September 22, 2017. Hurricane Jose stayed in the Atlantic Ocean but meandered off the coast of some of the Caribbean islands September 9th to September 17, 2017. There were no hurricanes that impacted The Bahamas in 2018.

Room Revenue

- Room revenue for the large Nassau/Paradise Island hotels increased in every month of 2018 compared to the same period of 2017, and this trend continued into January and February 2019. The room nights sold for the large hotels as a whole also increased in every month of 2018 and into January and February 2019;
- In January 2019, room revenue increased by 48% compared to January 2018 and room nights sold increased by 36%;
- In February 2019, room revenue increased by 41% compared to February 2018 and room nights sold increased by 27%.
- In January to February 2019 YTD, room revenue increased by 44% compared to the same period of 2018 and room nights sold increased by 31%.

APPENDIX

**CRUISE ARRIVALS TO THE BAHAMAS
1ST PORT OF ENTRY ONLY
JANUARY TO FEBRUARY 2019 AND 2018**

	January to February		
	2019	2018	% CHG
January	498,913	426,260	17.0%
February	445,622	395,926	12.6%
Total YTD	944,535	822,186	14.9%

Source: Dept. of Immigration, Port Authority, Customs and Bahamas Ministry of Tourism Research & Statistics Dept.,

- Cruise arrivals to the Bahamas as a whole, began January 2019 on a strong note which continued into February. Cruise arrivals were up by 14.9% between January to February 2019 YTD and up 12.6% in the month of February 2019.
- By February 2019 YTD, cruise arrivals (1st port of entry) were up in Nassau/Paradise Island (+32.5%), Abaco (+24%), Berry Islands (+5.2%), Bimini (10.7%), and Eleuthera (+23.9%).

**CRUISE ARRIVALS TO THE BAHAMAS
1ST PORT OF ENTRY ONLY
JANUARY TO FEBRUARY 2019**

	JANUARY TO FEBRUARY 2018		
	2019	2018	%CHG 19/18
Nassau/Paradise Island	542,673	409,593	32.5%
Grand Bahama	76,209	113,938	-33.1%
Abaco (Castaway Cay)	65,737	53,025	24.0%
Andros	-	-	0.0%
Berry Islands	92,231	87,640	5.2%
Bimini	2,735	2,471	10.7%
Cat Cay	-	-	0.0%
Cat Island	-	-	0.0%
Eleuthera (Princess Cay & Oth)	79,110	63,869	23.9%
Exuma	-	-	0.0%
Half Moon Cay	85,840	91,321	-6.0%
Inagua	-	329	-100.0%
Long Island	-	-	0.0%
San Salvador	-	-	0.0%
Bahamas Overall	944,535	822,186	14.9%

Source: Dept. of Immigration, Port Authority, Customs and Bahamas Ministry of Tourism Research & Statistics Dept.,

Sea Landed arrivals are not listed above. 2nd and 3rd port of call cruise arrivals are not listed in the above table.

All numbers are subject to revision.

- Cruise arrivals (1st port of entry) between January to February 2019 YTD were down in Grand Bahama, Half Moon Cay and Inagua. In February 2018, Inagua received the M/S Hamburg which increased the arrivals to the island during that month and for the rest of the year, but in February 2019 the island did not receive any such cruise ship. The island of Inagua does not normally receive cruise arrivals, so February 2018 had been a positive anomaly.

CRUISE ARRIVALS TO THE BAHAMAS
1ST PORT OF ENTRY ONLY
FEBRUARY 2019

	FEBRUARY 2019 ONLY		
	2019	2018	%CHG 19/18
Nassau/Paradise Island	242,399	177,018	36.9%
Grand Bahama	36,663	49,159	-25.4%
Abaco (Castaway Cay)	33,476	30,074	11.3%
Andros	-	-	0.0%
Berry Islands	51,546	56,027	-8.0%
Bimini	1,852	1,445	28.2%
Cat Cay	-	-	0.0%
Cat Island	-	-	0.0%
Eleuthera (Princess Cay & Oth)	45,114	33,972	32.8%
Exuma	-	-	0.0%
Half Moon Cay	34,572	47,902	-27.8%
Inagua	-	329	-100.0%
Long Island	-	-	0.0%
San Salvador	-	-	0.0%
Bahamas Overall	445,622	395,926	12.6%

Source: Dept. of Immigration, Port Authority, Customs and Bahamas Ministry of Tourism Research & Statistics Dept.,

Sea Landed arrivals are not listed above but made up the bulk of the arrivals into Bimini during the month.

2nd and 3rd port of call cruise arrivals are not listed in the above table.

All numbers are subject to revision.

- Cruise arrivals (1st port of entry) to the Bahamas overall were up by 12.6% in the month of February 2019. Despite this increase for the Bahamas as a whole, the following islands suffered declines in cruise arrivals (1st port of entry): Grand Bahama (-25.4%), Berry Islands (-8.0%) and Half Moon Cay (-27.8%).

This report is based on information from the Department of Immigration, the Customs Department, Port Authorities, large hotels and Research and Statistics Department, Ministry of Tourism.

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

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