

FOREIGN AIR AND SEA ARRIVALS

JANUARY TO JULY 2018 VS 2017

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

	Air and Sea Arrivals			Air Arrivals Only		
	2018	2017	%Chg 18/17	2018	2017	%Chg 18/17
January	533,732	509,343	4.8%	100,876	94,318	7.0%
February	534,155	534,581	-0.1%	126,315	108,208	16.7%
March	707,493	682,740	3.6%	184,117	146,023	26.1%
April	587,776	582,293	0.9%	144,042	138,075	4.3%
May	499,958	469,044	6.6%	136,092	114,422	18.9%
June	539,756	492,368	9.6%	154,903	133,855	15.7%
July	602,530	544,203	10.7%	163,406	144,634	13.0%
Grand Total	4,005,400	3,814,572	5.0%	1,009,751	879,535	14.8%

Source: Immigration, Customs various ports of entry in the Bahamas, and Port Authorities. Research and Statistics Dept. Ministry of Tourism
The Easter Holiday fell in the month of March 2018 instead of in April. All numbers are subject to revision

- Foreign air and sea arrivals to the Bahamas were up by 5.0% between the months of January to July 2018 compared to the same period of 2017.
- Foreign air arrivals by themselves were up by 14.8% between the months of January to July 2018 compared to the same period of 2017.

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

	2018	2017	2018/2017	2018	2017	2018/2017
	Air and Sea			Air Only		
			% Chg Air/Sea			% Chg Air
Nassau/Paradise Island	2,185,128	2,252,836	-3.0%	739,493	633,593	16.7%
Grand Bahama	461,595	421,883	9.4%	48,091	47,793	0.6%
Abaco	308,250	294,758	4.6%	87,453	73,834	18.4%
Andros	8,077	7,242	11.5%	7,947	7,052	12.7%
Berry Islands	389,620	338,345	15.2%	5,602	4,678	19.8%
Bimini	76,478	73,655	3.8%	18,350	20,711	-11.4%
Cat Cay	7,979	8,350	-4.4%	2,712	3,042	-10.8%
Cat Island	819	827	-1.0%	802	775	3.5%
Eleuthera	237,883	85,701	177.6%	44,651	34,392	29.8%
Exuma	42,448	42,667	-0.5%	41,814	41,843	-0.1%
Half Moon Cay	273,092	275,624	-0.9%	-	-	0.0%
Inagua	1,040	727	43.1%	43	64	-32.8%
Long Island	1,095	878	24.7%	989	819	20.8%
San Salvador	11,896	11,079	7.4%	11,804	10,939	7.9%
Bahamas Overall	4,005,400	3,814,572	5.0%	1,009,751	879,535	14.8%

All numbers are subject to revision. Carnival Cruise Lines significantly increased the cruise visitors to Princess Cay, Eleuthera during the 1st seven months of 2018. Source: Immigration and Customs various ports of entry in the Bahamas, & Research and Statistics Dept. Ministry of Tourism

Foreign air and sea arrivals were up in every month of 2018 except the month of February which was plagued by poor weather. Cruise arrivals (1st port of entry) which form a part of the sea Market Update Report July 2018 Research & Statistics Dept. Bahamas Ministry of Tourism

arrivals were up in every month during the 1st seven months except February and March 2018 because of poor weather, that caused rough seas that negatively impacted ocean travel to the destination during these two months.

Many Islands of the Bahamas experienced increases in foreign arrivals by the end of the 1st seven months of 2018:

ISLANDS UP

- Foreign arrivals to Grand Bahama were up by 9.4%, and air arrivals by themselves were up by 0.6% by the end of July 2018. Air arrivals to the island were up in the months of March (the month of the Easter Holiday), May, June, and July 2018. After Hurricane Matthew in October 2016, air arrivals to the island of Grand Bahama were significantly impacted by the closure of the Memories Resort because the number of room nights available for sale & the number of rooms in inventory had significantly declined;
- Out Islands up 24.0%, foreign arrivals were up for most of these islands:
 - Abaco up 4.6%;
 - Andros up 11.5%;
 - Berry Islands up 15.2%;
 - Bimini up 3.8%;
 - Eleuthera up 177.6%
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. In addition, Carnival Cruises and Princess Cruises significantly increased their calls on Princess Cay (Eleuthera) during the 1st seven months of the year;
- Inagua up 43.1%
This increase in arrivals to Inagua was significantly influenced by the M/S Hamburg cruise ship that made a call on the island in February 2018. This ship significantly impacted the increase in arrivals during the 1st seven months of the year;
- Long Island up 24.7%;
- San Salvador up 7.4%.

ISLANDS DOWN

- Foreign Arrivals to Nassau/Paradise Island were down 3.0% by the end of July 2018, but air arrivals by themselves to the island were up by 16.7%;
- The decline in foreign arrivals to Nassau/Paradise Island, was influenced by the reduction in cruise calls to the island by several cruise lines (Norwegian Cruises, Carnival Cruises, Royal Caribbean Int'l) during the months of February, March, April, May, and June. In July 2018, both Carnival Cruises and Norwegian Cruises made fewer calls as a 1st port of entry than they had in July 2017. Some cruise lines simply did not make Nassau/Paradise Island their 1st port of call in the 1st seven months of 2018 and instead chose to go to Grand Bahama or the Out Islands before calling on Nassau Paradise Island as a 2nd or 3rd port of call;
- Cat Cay arrivals down 4.4%;
- Cat Island arrivals down 1.0%;
- Exuma arrivals down 0.5%;
- Half Moon Cay (cruise port only) down 0.9%.

FOREIGN AIR AND SEA ARRIVALS

JULY 2018 VS 2017

FOREIGN AIR AND SEA ARRIVALS TO THE BAHAMAS 1ST PORT OF ENTRY ONLY JULY 2018

	2018	2017	2018/2017	2018	2017	2018/2017
	Air and Sea			Air Only		
			% Chg Air/Sea			% Chg Air
Nassau/Paradise Island	320,249	315,698	1.4%	120,861	106,066	13.9%
Grand Bahama	76,899	62,897	22.3%	7,762	7,368	5.3%
Abaco	44,301	36,696	20.7%	15,181	11,715	29.6%
Andros	1,392	1,161	19.9%	1,382	1,135	21.8%
Berry Islands	71,401	44,347	61.0%	774	907	-14.7%
Bimini	16,920	18,146	-6.8%	2,354	3,453	-31.8%
Cat Cay	1,665	1,551	7.4%	453	404	12.1%
Cat Island	66	59	11.9%	66	59	11.9%
Eleuthera	29,965	10,741	179.0%	6,979	5,318	31.2%
Exuma	6,088	6,563	-7.2%	6,060	6,538	-7.3%
Half Moon Cay	31,980	44,583	-28.3%	-	-	0.0%
Inagua	45	85	-47.1%	-	8	-100.0%
Long Island	128	136	-5.9%	119	125	-4.8%
San Salvador	1,431	1,540	-7.1%	1,415	1,538	-8.0%
Bahamas Overall	602,530	544,203	10.7%	163,406	144,634	13.0%

All numbers are subject to revision. Carnival Cruise Lines significantly increased the cruise visitors to Princess Cay, Eleuthera during the month.

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

- Foreign arrivals for the Bahamas Overall were up by 10.7% during the month of July 2018 compared to July 2017, air arrivals were also up by 13.0%.

ISLANDS UP JULY

- Foreign arrivals (1st port of entry) to Nassau/Paradise Island were up by 1.4% during the month of July 2018 compared to 2017 and air arrivals were up by 13.9%;
- Grand Bahama up 22.3%;
- Abaco up 20.7%;
- Andros up 19.9%;
- Berry Islands up 61.0% primarily because Norwegian Cruises and Royal Caribbean Int'l significantly increased their calls on Great Stirrup Cay and Coco Cay during the month of July 2018 compared to July 2017;
- Cat Cay up 7.4%;
- Cat Island up 11.9%;
- Eleuthera up 179.0% primarily because Carnival & Princess Cruises increased calls to Princess Cay. There was also an increase in airlift into North Eleuthera from the US.

ISLANDS DOWN JULY

- Foreign arrivals (1st port of entry) to Bimini were down by 6.8% in July 2018 compared to July 2017;
- Exuma down 7.2%;
- Half Moon Cay (cruise port only) down 28.3%;
- Inagua down 47.1%;
- Long Island down 5.9%;
- San Salvador down 7.1%.

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: the Courtyard Marriott, the Holiday Inn Express, the Warwick Resort (opened in late October 2016), and the Baha Mar properties (the Grand Hyatt which softly opened in April 2017 and the SLS which softly opened in November 2017). All of these hotels would have been in full operation between the months of January to July 2018 and would have attracted visitors to their properties. The Rosewood Baha Mar softly opened at the end of May 2018 and their numbers are included below.

NASSAU AND PARADISE ISLAND SELECT LARGE HOTELS PERFORMANCE

PRELIMINARY STATISTICS 2018-2017

	Occupancy		ADR		RevPar		Room Revenue	Nassau/P.I. Air Arrivals	Room Nights Sold
	2018	2017	2018	2017	2018	2017	% Chg 18/17	% Chg 18/17	% Chg 18/17
Jan	53.1%	61.7%	\$241.31	\$ 208.77	\$128.12	\$128.81	35%	8%	17%
Feb	62.9%	67.2%	\$246.29	\$ 232.63	\$154.86	\$156.38	34%	19%	26%
Mar	75.1%	76.5%	\$317.03	\$ 287.73	\$238.24	\$220.17	45%	28%	32%
Apr	72.4%	75.6%	\$265.17	\$ 282.84	\$192.04	\$213.71	20%	9%	28%
May	63.8%	58.7%	\$222.06	\$ 212.53	\$141.59	\$124.69	36%	22%	30%
Jun	67.9%	65.3%	\$233.12	\$ 237.76	\$158.19	\$155.16	22%	16%	24%
Jul	72.9%	73.5%	\$251.21	\$ 251.59	\$183.10	\$185.01	21%	14%	21%
YTD	66.9%	68.2%	\$255.77	\$ 247.02	\$171.11	\$168.55	30%	17%	26%

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 that extended into 2017. The Ocean Club was closed in November 2016 for repairs after Hurricane Matthew and remained closed in January 2017 for renovations 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 and in 2018, it fell between March and April (i.e. Good Friday fell on March 30th 2018, Easter Sunday on April 1, 2018 and Easter Monday on April 2, 2018). Easter Monday is not a federal/state holiday in the US but it is in some countries. The Warwick Paradise Island was not open in January thru August 2016 but was open thereafter and into 2017 and 2018 RIU was closed for renovations in August 2017 and did not reopen until the end of October. The Grand Hyatt was not in full operation in May 2017 but it was in full operation in May and June 2018. Hurricane Irma caused the Lynden Pindling Airport to be closed for September 8 and 9th, 2017.

The data in the table above includes Baha Mar and Atlantis properties.

Room Revenue

- Room revenue for the large Nassau/Paradise Island hotels increased in every month during the 1st seven months of 2018 compared to the same period of 2017. The room nights sold also increased in every month during the first seven months of 2018;
- In January 2018, room revenue increased by 35% compared to January 2017 and room nights sold increased by 17%;
- In February 2018, room revenue increased by 34% compared to February 2017 and room nights sold increased by 26%;
- In March 2018, room revenue increased by 45% compared to March 2017 and room nights sold increased by 32%;
- In April 2018, room revenue increased by 20% compared to April 2017 and room nights sold increased by 28%;
- In May 2018, room revenue increased by 36% compared to May 2017 and room nights sold increased by 30%;
- In June 2018, room revenue increased by 22% compared to July 2017 and room nights sold increased by 24%;

- In July 2018, room revenue increased by 21% compared to July 2017 and room nights sold increased by 21%;
- In January to July 2018 YTD, room revenue increased by 30% compared to the same period of 2017 and room nights sold increased by 26%.

APPENDIX

CRUISE ARRIVALS TO THE BAHAMAS 1ST PORT OF ENTRY ONLY JANUARY TO JULY 2018 AND 2017

	January to July YTD		
	2018	2017	% CHG
January	426,260	407,272	4.7%
February	395,926	416,320	-4.9%
March	504,208	520,348	-3.1%
April	428,273	427,469	0.2%
May	348,392	334,674	4.1%
June	353,931	333,287	6.2%
July	408,556	370,885	10.2%
Total YTD	2,865,546	2,810,255	2.0%

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

Poor weather conditions on the sea in February and March 2018 impacted the cruise arrivals into the destination during that month.

- Cruise arrivals started the year off strong in the month of January 2018, but poor weather which caused rough seas in both February and March significantly impacted the overall cruise arrivals into the destination in the first few months of the year. Cruise arrivals for the months of April May, June, and July 2018 were up compared to the same period of 2017, and the increase in these months did neutralize the decline in cruise arrivals during the months of February and March 2018;
- By the end of July 2018, cruise arrivals (1st port of entry) were up by 2.0%. They were up in Grand Bahama, Berry Islands, Bimini, Princess Cay (Eleuthera), and Inagua.

CRUISE ARRIVALS TO THE BAHAMAS
1ST PORT OF ENTRY ONLY
JANUARY TO JULY 2018

	JANUARY TO JULY 2018		
	2018	2017	%CHG 18/17
Nassau/Paradise Island	1,437,405	1,610,531	-10.7%
Grand Bahama	354,018	316,396	11.9%
Abaco (Castaway Cay)	212,082	212,570	-0.2%
Andros	-	-	0.0%
Berry Islands	380,630	331,942	14.7%
Bimini	15,596	12,508	24.7%
Cat Cay	-	-	0.0%
Cat Island	-	-	0.0%
Eleuthera (Princess Cay & Oth)	192,394	50,684	279.6%
Exuma	-	-	0.0%
Half Moon Cay	273,092	275,624	-0.9%
Inagua	329	-	100.0%
Long Island	-	-	0.0%
San Salvador	-	-	0.0%
Bahamas Overall	2,865,546	2,810,255	2.0%

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.

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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