

## FOREIGN AIR AND SEA ARRIVALS

### YTD JULY 2019 VS YTD JULY 2018

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

	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%
March	749,044	707,493	5.9%	201,578	184,117	9.5%
April	657,617	587,776	11.9%	171,167	144,042	18.8%
May	589,102	499,958	17.8%	158,741	136,092	16.6%
June	641,410	539,756	18.8%	168,392	154,903	8.7%
July	650,353	602,530	7.9%	175,971	163,406	7.7%
<b>Grand Total</b>	<b>4,532,778</b>	<b>4,005,400</b>	<b>13.2%</b>	<b>1,156,897</b>	<b>1,009,751</b>	<b>14.6%</b>

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 13.2% between January to July 2019 YTD compared to the same period of 2018.
- Foreign air arrivals by themselves were up by 14.6% between January to July 2019 YTD compared to the same period of 2018.

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

	2019	2018	2019/2018	2019	2018	2019/2018
	Air and Sea			Air Only		
			% Chg Air/Sea			% Chg Air
Nassau/Paradise Island	2,622,114	2,185,128	20.0%	876,635	739,493	18.5%
Grand Bahama	415,124	461,595	-10.1%	43,715	48,091	-9.1%
Abaco	284,228	308,250	-7.8%	91,130	87,453	4.2%
Andros	6,606	8,077	-18.2%	6,498	7,947	-18.2%
Berry Islands	556,819	389,620	42.9%	7,678	5,602	37.1%
Bimini	73,064	76,478	-4.5%	14,169	18,350	-22.8%
Cat Cay	7,788	7,979	-2.4%	3,098	2,712	14.2%
Cat Island	954	819	16.5%	899	802	12.1%
Eleuthera	253,836	237,883	6.7%	50,684	44,651	13.5%
Exuma	49,421	42,448	16.4%	48,732	41,814	16.5%
Half Moon Cay	248,155	273,092	-9.1%	-	-	0.0%
Inagua	970	1,040	-6.7%	383	43	790.7%
Long Island	1,174	1,095	7.2%	1,023	989	3.4%
San Salvador	12,525	11,896	5.3%	12,253	11,804	3.8%
<b>Bahamas Overall</b>	<b>4,532,778</b>	<b>4,005,400</b>	<b>13.2%</b>	<b>1,156,897</b>	<b>1,009,751</b>	<b>14.6%</b>

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 and sea arrivals were up in January, February, March, April, May, June and July 2019 compared to the same period of 2018. Foreign arrivals (1<sup>st</sup> port of entry) were up in the following islands: Nassau/Paradise Island, Berry Islands, Cat Island, Eleuthera, Exuma, Long Island and San Salvador between January to July 2019 YTD.

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

### ISLANDS UP 2019 YTD

- Foreign Arrivals to Nassau/Paradise Island were up 20.0% between January to July 2019 YTD, and air arrivals by themselves to the island were up by 18.5%. Air arrivals to Nassau/P.I. were up in every month of 2018 compared to 2017, and this trend continued into July 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 great marketing efforts done by the Bahamas Ministry of Tourism, its Industry Partners and the hotels themselves.
- Berry Islands up 42.9%;
- Cat Island arrivals up 16.5%;
- Eleuthera up 6.7%  
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 13.5%;
- Exuma up 16.4%;
- Long Island up 7.2%;
- San Salvador up 5.3%.

### ISLANDS DOWN 2019 YTD

- Abaco was down 7.8% primarily because Disney Cruise Lines reduced the number of calls on the island between January to July 2019 compared to 2018 as a 1<sup>st</sup> port of call. Air arrivals on their own however, were up by 4.2%;
- Andros down 18.2%;
- Bimini down 4.5%;
- Cat Cay down 2.4%;
- Foreign arrivals to Grand Bahama were down 10.1%, and air arrivals by themselves were also down by 9.1% between January to July 2019 YTD. Air arrivals to Grand Bahama had been trending up since May 2018. In March 2019 however, air arrivals to the island did “slow,” and have been up and down since then.
  - Between January to July 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. In the early months of the year, poor weather and routing schedules would have been partially responsible for this decline in cruise arrivals as ships to the island were re-routed or cancelled during the period. The following cruise lines brought in fewer cruise visitors (1<sup>st</sup> port of entry) to GBI than in the previous period: Carnival Cruises (a decline of 16.9%), and Royal Caribbean Int’l (-7.5%). The number of cruise calls made on Grand Bahama between January to July 2019 YTD did increase by 8.2%, however, these calls were made by smaller ships and were not enough to balance off the decline in calls made by the larger ships;
- Half Moon Cay down 9.1%;
- Inagua down 6.7% for July YTD, but air arrivals to the island were up significantly

## FOREIGN AIR AND SEA ARRIVALS

### JULY 2019 VS 2018

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

	2019	2018	2019/2018	2019	2018	2019/2018
	Air and Sea		% Chg Air/Sea	Air Only		% Chg Air
Nassau/Paradise Island	329,520	320,249	2.9%	133,966	120,861	10.8%
Grand Bahama	78,871	76,899	2.6%	5,986	7,762	-22.9%
Abaco	52,569	44,301	18.7%	14,876	15,181	-2.0%
Andros	1,011	1,392	-27.4%	986	1,382	-28.7%
Berry Islands	107,593	71,401	50.7%	1,163	774	50.3%
Bimini	14,761	16,920	-12.8%	2,046	2,354	-13.1%
Cat Cay	1,306	1,665	-21.6%	446	453	-1.5%
Cat Island	103	66	56.1%	99	66	50.0%
Eleuthera	23,957	29,965	-20.1%	7,159	6,979	2.6%
Exuma	7,528	6,088	23.7%	7,507	6,060	23.9%
Half Moon Cay	31,247	31,980	-2.3%	-	-	0.0%
Inagua	155	45	244.4%	53	-	100.0%
Long Island	125	128	-2.3%	100	119	-16.0%
San Salvador	1,607	1,431	12.3%	1,584	1,415	11.9%
<b>Bahamas Overall</b>	<b>650,353</b>	<b>602,530</b>	<b>7.9%</b>	<b>175,971</b>	<b>163,406</b>	<b>7.7%</b>

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 for the Bahamas Overall were up by 7.9% during the month of July 2019 compared to July 2018 and air arrivals by themselves were up by 7.7%.
- Foreign arrivals to Nassau/Paradise Island were up by 2.9% in July 2019.

**ISLANDS UP JULY**

- Foreign arrivals (1<sup>st</sup> port of entry) to Nassau/Paradise Island were up by 2.9% during the month of July 2019 compared to 2018. Arrivals to Nassau/Paradise Island did not grow as much during the month as they had in the earlier months of the year because the cruise arrivals by 1<sup>st</sup> port of entry declined by 1.9% as the cruise lines chose to go to Grand Bahama, Abaco and the Berry Islands for many of their first calls before they travelled to Nassau/Paradise Island as a 2<sup>nd</sup> or 3<sup>rd</sup> port of call. Air arrivals by themselves were up by 10.8%. The percentage growth in air arrivals to the island during the month was slower than in the previous months of 2019. However, there was good news, the growth in air arrivals to Nassau/Paradise Island during the month, was better than it had been in 20 years for any given July.
- Grand Bahama foreign arrivals were up by 2.6%, but air arrivals by themselves in July 2019 were down by 22.9%.
- Abaco arrivals were up 18.7% because of cruise arrivals, however air arrivals were down for the island during the month;
- Berry Islands up 50.7% and air arrivals by themselves up 50.3%;
- Cat Island up 56.1%;
- Exuma up 23.7%;
- Inagua up 244.4%.
- San Salvador up 12.3%.

**ISLANDS DOWN JULY**

- Andros down 27.4%;
- Bimini down 12.8% during the month. Constant power outages on the island of Bimini may have influenced hotel cancellations by visitors as only one hotel on the island is said to have a generator.
- Cat Cay down 21.6%;
- Eleuthera foreign arrivals were down by 20.1% during the month, and air arrivals by themselves were up 2.6% because there was an increase in airlift into North Eleuthera from the US in 2018;
- Half Moon Cay (cruise port only) down 2.3%;
- Long Island down 2.3%;

## **Air Arrivals July 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 2019.

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

In July 2019, air arrivals to Nassau/Paradise Island were up by 10.8% compared to July 2018 and by the end of July 2019 YTD, they were up by 18.5%. The percentage growth in air arrivals to the island during the month was slower than in the previous months of 2019. However, there was good news, the growth during the month in air arrivals to the island was better than it had been in 20 years for any given July.

In July 2019, air arrivals were up significantly not only to Nassau/Paradise Island but to the Bahamas overall. In July 2019, air arrivals to the Bahamas overall were up by 7.7%, and by July 2019 YTD they were up by 14.6%.

The air arrival growth to the Bahamas overall for YTD July 2019 was influenced by the growth in the following islands: Nassau/Paradise Island, Abaco, Berry Islands, Cat Cay, Cat Island, Eleuthera (despite the runway issues in Rock Sound), Exuma, Inagua, Long Island and San Salvador.

## 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 2<sup>nd</sup> Qtr. 2017 and the SLS which softly opened in December 2017). All of these hotels would have been in full operation in 2018 & in July 2019 and would have attracted visitors to their properties. The Rosewood, Baha Mar softly opened at the end of 3<sup>rd</sup> Qtr. 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.	Room
	2019	2018	2019	2018	2019	2018	% Chg 19/18	Air Arrivals	Nights Sold
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%
Mar	85.8%	75.2%	\$ 345.64	\$ 317.64	\$ 296.49	\$ 239.00	28%	14%	17%
Apr	78.5%	72.6%	\$ 304.68	\$ 265.35	\$ 239.07	\$ 192.77	28%	21%	11%
May	72.6%	63.5%	\$ 237.93	\$ 223.26	\$ 172.77	\$ 141.79	26%	20%	18%
Jun	75.0%	68.1%	\$ 243.32	\$ 233.22	\$ 182.42	\$ 158.76	18%	14%	13%
Jul	82.9%	73.0%	\$ 258.87	\$ 251.48	\$ 214.57	\$ 183.66	19%	11%	16%
<b>YTD</b>	<b>77.5%</b>	<b>67.0%</b>	<b>\$ 277.40</b>	<b>\$ 256.33</b>	<b>\$ 214.89</b>	<b>\$ 171.66</b>	<b>29%</b>	<b>19%</b>	<b>19%</b>

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 July 2019. The room nights sold for the large hotels as a whole also increased in every month of 2018 and into July 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 March 2019, room revenue increased by 28% compared to March 2018 and room nights sold increased by 17%;
- In April 2019, room revenue increased by 28% compared to April 2018 and room nights sold increased by 11%;
- In May 2019, room revenue increased by 26% compared to May 2018 and room nights sold increased by 18%;
- In June 2019, room revenue increased by 18% compared to June 2018 and room nights sold increased by 13%;

- In July 2019, room revenue increased by 19% compared to July 2018 and room nights sold increased by 16%;
- In January to July 2019 YTD, room revenue increased by 29% compared to the same period of 2018 and room nights sold increased by 19%.

### APPENDIX

#### CRUISE ARRIVALS TO THE BAHAMAS 1ST PORT OF ENTRY ONLY JANUARY TO JULY 2019 AND 2018

	January to July		
	2019	2018	% CHG
January	498,913	426,260	17.0%
February	445,622	395,926	12.6%
March	530,038	504,208	5.1%
April	471,099	428,273	10.0%
May	413,944	348,392	18.8%
June	445,463	353,931	25.9%
July	449,767	408,556	10.1%
<b>Total YTD</b>	<b>3,254,846</b>	<b>2,865,546</b>	<b>13.6%</b>

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. The growth in cruise arrivals continued into July 2019, but not every island experienced it. Cruise arrivals were up by 13.6% between January to July 2019 YTD and up 10.1% in the month of July 2019.

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

	JANUARY TO JULY		
	2019	2018	%CHG 19/18
Nassau/Paradise Island	1,737,224	1,437,405	20.9%
Grand Bahama	322,949	354,018	-8.8%
Abaco (Castaway Cay)	184,200	212,082	-13.1%
Andros	-	-	0.0%
Berry Islands	543,804	380,630	42.9%
Bimini	16,111	15,596	3.3%
Cat Cay	-	-	0.0%
Cat Island	-	-	0.0%
Eleuthera (Princess Cay & Oth)	202,403	192,394	5.2%
Exuma	-	-	0.0%
Half Moon Cay	248,155	273,092	-9.1%
Inagua	-	329	-100.0%
Long Island	-	-	0.0%
San Salvador	-	-	0.0%
<b>Bahamas Overall</b>	<b>3,254,846</b>	<b>2,865,546</b>	<b>13.6%</b>

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.

- By July 2019 YTD, cruise arrivals (1<sup>st</sup> port of entry) were up in Nassau/Paradise Island (+20.9%), Berry Islands (+42.9%), Bimini (3.3%), and Eleuthera (+5.2%).
- Cruise arrivals (1<sup>st</sup> port of entry) between January to July 2019 YTD were down in Grand Bahama, Abaco, 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. The island of Inagua does not normally receive cruise arrivals and did not receive any in 2019 so far.



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

	JULY ONLY		
	2019	2018	%CHG 19/18
Nassau/Paradise Island	194,764	198,510	-1.9%
Grand Bahama	62,400	55,235	13.0%
Abaco (Castaway Cay)	35,995	26,707	34.8%
Andros	-	-	0.0%
Berry Islands	105,405	69,843	50.9%
Bimini	3,226	3,446	-6.4%
Cat Cay	-	-	0.0%
Cat Island	-	-	0.0%
Eleuthera (Princess Cay & Oth)	16,730	22,835	-26.7%
Exuma	-	-	0.0%
Half Moon Cay	31,247	31,980	-2.3%
Inagua	-	-	0.0%
Long Island	-	-	0.0%
San Salvador	-	-	0.0%
<b>Bahamas Overall</b>	<b>449,767</b>	<b>408,556</b>	<b>10.1%</b>

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

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

All numbers are subject to revision.

- Cruise arrivals (1<sup>st</sup> port of entry) to the Bahamas overall were up by 10.1% in the month of July 2019. The following islands suffered declines in cruise arrivals (1<sup>st</sup> port of entry) during the month: Nassau/Paradise Island (-1.9%), Bimini (-6.4%), Eleuthera (-26.7%), and Half Moon Cay (-2.3%).

*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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