

## FOREIGN AIR AND SEA ARRIVALS

### 1<sup>ST</sup> QTR. 2018 VS 2017

#### FOREIGN AIR AND SEA ARRIVALS TO THE BAHAMAS 1ST PORT OF ENTRY ONLY JANUARY TO MARCH (1ST QTR.)

	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%
<b>Grand Total</b>	<b>1,775,380</b>	<b>1,726,664</b>	<b>2.8%</b>	<b>411,308</b>	<b>348,549</b>	<b>18.0%</b>

Source: Immigration, Customs various ports of entry in the Bahamas, and Port Authorities. Research and Statistics Dept. Ministry of Tourism  
February 2018, air and sea arrivals numbers were revised.

#### FOREIGN AIR AND SEA ARRIVALS TO THE BAHAMAS 1ST PORT OF ENTRY ONLY JANUARY TO MARCH 2018 (1ST QTR.)

	2018	2017	2018/2017	2018	2017	2018/2017
	Air and Sea			Air Only		
			% Chg Air/Sea			% Chg Air
Nassau/Paradise Island	974,816	992,249	-1.8%	303,825	254,274	19.5%
Grand Bahama	201,966	192,184	5.1%	19,937	20,959	-4.9%
Abaco	121,052	146,028	-17.1%	30,945	24,540	26.1%
Andros	2,936	2,590	13.4%	2,874	2,500	15.0%
Berry Islands	151,235	174,882	-13.5%	2,313	1,703	35.8%
Bimini	24,852	20,497	21.2%	8,265	7,435	11.2%
Cat Cay	2,455	2,203	11.4%	1,168	1,010	15.6%
Cat Island	283	311	-9.0%	266	279	-4.7%
Eleuthera	128,312	53,821	138.4%	17,744	13,639	30.1%
Exuma	18,267	17,432	4.8%	17,999	17,093	5.3%
Half Moon Cay	142,576	118,949	19.9%	-	-	0.0%
Inagua	633	349	81.4%	19	28	-32.1%
Long Island	470	408	15.2%	458	383	19.6%
San Salvador	5,527	4,761	16.1%	5,495	4,706	16.8%
<b>Bahamas Overall</b>	<b>1,775,380</b>	<b>1,726,664</b>	<b>2.8%</b>	<b>411,308</b>	<b>348,549</b>	<b>18.0%</b>

All numbers are subject to revision.

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

In the last Qtr. of 2017, foreign air and sea arrivals performed very well, and this positive trend flowed into the 1<sup>st</sup> Qtr. of 2018. In 1<sup>st</sup> Qtr. 2018, foreign air and sea arrivals were up by 2.8% and air arrivals by themselves were up by 18%. The amount of boaters/yachters (sea arrivals are made up of cruise arrivals and boaters/yachters) that sailed to the Bahamas also increased during the quarter but cruise arrivals did stumble and fall a bit. The increase in air and boating arrivals to the Bahamas would have been impacted by the Easter Holiday which fell between March 30, and April 1, 2018. The Easter Holiday is always a big travel period for visitors to come to the destination. Although cruise arrivals stumbled and fell in the 1<sup>st</sup> Qtr. of 2018, the significant increase in both air and boating arrivals, neutralized this decline.

Cruise arrivals started the year off strong in the month of January 2018 but slipped during the months of February and March because of poor weather, that caused rough seas that negatively impacted ocean travel to the destination. On March 5, 2018, there were more than five ship cancellations into the port of Nassau alone because of rough seas. It is estimated that these ships would have brought in well over 10,000 cruise visitors for that day alone. The decline in cruise arrivals to the Bahamas in the qtr. occurred primarily in Nassau/Paradise Island, Castaway Cay, and the Berry Islands.

Many of the Islands of the Bahamas experienced increases during the 1<sup>st</sup> Qtr:

▪ **Foreign arrivals were up in 1<sup>st</sup> Qtr.:** 

- Grand Bahama (up 5.1%)

Foreign arrivals overall were up 5.1%, but air arrivals to Grand Bahama were down for the qtr. Air arrivals to the island continued to be down as a result of the closure of the Memories Resort, although the rate of the decline slowed; in fact, air arrivals to Grand Bahama in March 2018 were actually up by 7.4% during the month. The increase in overall foreign arrivals to Grand Bahama in the 1<sup>st</sup> qtr. 2018, were impacted by a significant increase in cruise arrivals that came into the island in January and February and the increase in air arrivals in the month of March;

- The Out Islands (up by 10.4%)

Foreign Arrivals were up in most of the major Out Islands during the qtr.;

- Andros (up 13.4%);

- Bimini (up 21.2%)

Foreign arrivals to Bimini were up 21.2% in part because there were more arrivals that came by boat/yacht in 1<sup>st</sup> Qtr. 2018 than in the same period of 2017. In addition, air arrivals increased by 11.2% during the qtr. and this significantly increased the overall arrivals to the destination;

- Cat Cay (up 11.4%);

- Eleuthera (up 138.4%)

Foreign arrivals to Eleuthera were up 138.4% in part because Carnival Cruises and Princess Cruises both significantly increased the number of calls and cruise arrivals to Princess Cay, Eleuthera in 1<sup>st</sup> qtr. 2018 (as a 1<sup>st</sup> port of call) compared to the same period of 2017. In addition, air arrivals to Eleuthera significantly increased by 30.1% in 1<sup>st</sup> Qtr. 2018 compared to 1<sup>st</sup> Qtr. 2017;

- Exuma (up 4.8%);


- Half Moon Cay (up 19.9%) is a cruise port only;

- Inagua (up 81.4%),

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 Qtr;

- Long Island (up by 15.2%).

- San Salvador (up 16.1%).

- **Foreign arrivals were down in 1<sup>st</sup> Qtr.:** 
  - Nassau/Paradise Island, arrivals were down by -1.8% overall but air arrivals by themselves to the island were up by 19.5%. The decline in foreign arrivals to Nassau/Paradise Island, was influenced by the reduction in cruise calls to the island by several cruise lines during the months of February and March 2018. Royal Caribbean Int'l was one of the cruise lines that reduced the number of cruise visitors that they brought to the island in both February and March 2018. In addition, poor weather caused rough seas that caused a significant amount of cruise ship cancellations by various cruise lines to the island during the month of March in the 1<sup>st</sup> Qtr. 2018;
  - Abaco arrivals were down -17.1% in part because Disney Cruises reduced the amount of cruise visitors that they brought into the island during the qtr. by 1<sup>st</sup> port of call. Air arrivals for the qtr. however were up by 26.1%;
  - Berry Islands (down by -13.5%), Royal Caribbean Int'l reduced the amount of cruise visitors that they brought into Coco Cay, Berry Islands during every month of the 1<sup>st</sup> qtr. 2018 compared to the same period of 2017 by 1<sup>st</sup> port of call;
  - Cat Island (down by -9%).

### FOREIGN AIR AND SEA ARRIVALS

#### MARCH 2018 VS 2017

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

	2018	2017	2018/2017	2018	2017	2018/2017
	Air and Sea		% Chg Air/Sea	Air Only		% Chg Air
Nassau/Paradise Island	393,338	383,216	2.6%	134,042	104,972	27.7%
Grand Bahama	67,240	86,203	-22.0%	8,292	7,723	7.4%
Abaco	52,407	58,382	-10.2%	16,196	11,814	37.1%
Andros	1,213	1,163	4.3%	1,190	1,134	4.9%
Berry Islands	61,913	76,282	-18.8%	1,164	728	59.9%
Bimini	13,132	8,840	48.6%	3,800	3,479	9.2%
Cat Cay	1,288	917	40.5%	580	465	24.7%
Cat Island	136	134	1.5%	119	122	-2.5%
Eleuthera	55,418	17,456	217.5%	8,853	6,526	35.7%
Exuma	7,710	7,289	5.8%	7,579	7,150	6.0%
Half Moon Cay	51,255	40,714	25.9%	-	-	0.0%
Inagua	119	238	-50.0%	4	18	-77.8%
Long Island	211	139	51.8%	205	133	54.1%
San Salvador	2,113	1,767	19.6%	2,093	1,759	19.0%
<b>Bahamas Overall</b>	<b>707,493</b>	<b>682,740</b>	<b>3.6%</b>	<b>184,117</b>	<b>146,023</b>	<b>26.1%</b>

All numbers are subject to revision.

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

#### Foreign Arrivals for March 2018 Up:

- Foreign arrivals for the Bahamas Overall were up by 3.6% during the month of March 2018 compared to March 2017, air arrivals were also up by 26.1%;
- Nassau/Paradise Island (up 2.6%), air arrivals were also up by 27.7%;

- Foreign arrivals to the Out Islands continued to perform well in March 2018 and were up by 15.7% during the month. Air arrivals to the Out Islands during the month were up by 25.4%;
- Andros (up 4.3%), air arrivals also up by 4.9%;
- Bimini (up 48.6%), air arrivals also up by 9.2%;
- Cat Cay (up 40.5%), air arrivals also up by 24.7%;
- Cat Island (up 1.5%);
- Eleuthera (up 217.5%), air arrivals also up by 35.7%;
- Exuma (up 5.8%), air arrivals also up by 6%;
- Half Moon Cay (up 25.9%);
- Long Island (up 51.8%), air arrivals also up by 54.1%;
- San Salvador (up 19.6%), air arrivals also up by 19.0%.

**Foreign Arrivals for March 2018 Down:** 

- Grand Bahama down by -22.0%, but air arrivals up by 7.4% during the month;
- Abaco down by -10.2% because Disney Cruise lines brought in less cruise visitors to the island as a 1<sup>st</sup> port of call than in March 2017, but air arrivals up by 37.1% during the month;
- Berry Islands down by -18.8% because Royal Caribbean Int'l brought in fewer cruise visitors into Coco Cay, Berry Islands as a 1<sup>st</sup> port of call than they had in March 2017, but air arrivals to the Berry Islands were up by 59.9%;
- Inagua (down -50%)

## 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 in 1<sup>st</sup> Qtr. 2018 and would have attracted visitors to their properties.

### 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%
<b>YTD</b>	<b>63.7%</b>	<b>68.6%</b>	<b>\$273.59</b>	<b>\$ 246.63</b>	<b>\$ 174.37</b>	<b>\$ 169.10</b>	<b>39%</b>	<b>20%</b>	<b>26%</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 that extended into 2017. One of the large Paradise Island hotels 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. 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 1<sup>st</sup> Qtr. 2018 compared to the same period of 2017. The room nights sold also increased in every month during the 1<sup>st</sup> Qtr. 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 the 1<sup>st</sup> Qtr. 2018, room revenue increased by 39% 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 1ST QTR. 2018 and 2017

	January to March 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%
<b>Total YTD</b>	<b>1,326,394</b>	<b>1,343,940</b>	<b>-1.3%</b>

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 for the 1<sup>st</sup> Qtr. 2018.

### CRUISE ARRIVALS TO THE BAHAMAS 1ST PORT OF ENTRY ONLY 1ST QTR. 2018

	1ST QTR. 2018		
	2018	2017	%CHG 18/17
Nassau/Paradise Island	667,021	733,606	-9.1%
Grand Bahama	164,757	154,229	6.8%
Abaco (Castaway Cay)	88,682	119,699	-25.9%
Andros	-	-	0.0%
Berry Islands	147,888	172,877	-14.5%
Bimini	4,848	4,617	5.0%
Cat Cay	-	-	0.0%
Cat Island	-	-	0.0%
Eleuthera (Princess Cay & Oth)	110,293	39,963	176.0%
Exuma	-	-	0.0%
Half Moon Cay	142,576	118,949	19.9%
Inagua	329	-	100.0%
Long Island	-	-	0.0%
San Salvador	-	-	0.0%
<b>Bahamas Overall</b>	<b>1,326,394</b>	<b>1,343,940</b>	<b>-1.3%</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.

**CRUISE ARRIVALS TO THE BAHAMAS  
1ST PORT OF ENTRY ONLY  
MARCH 2018**

	MARCH 2018 ONLY		
	2018	2017	%CHG 18/17
Nassau/Paradise Island	257,428	276,062	-6.7%
Grand Bahama	50,819	70,483	-27.9%
Abaco (Castaway Cay)	35,657	45,769	-22.1%
Andros	-	-	0.0%
Berry Islands	60,248	75,444	-20.1%
Bimini	2,377	1,103	115.5%
Cat Cay	-	-	0.0%
Cat Island	-	-	0.0%
Eleuthera (Princess Cay & Oth)	46,424	10,773	330.9%
Exuma	-	-	0.0%
Half Moon Cay	51,255	40,714	25.9%
Inagua	-	-	0.0%
Long Island	-	-	0.0%
San Salvador	-	-	0.0%
<b>Bahamas Overall</b>	<b>504,208</b>	<b>520,348</b>	<b>-3.1%</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.

*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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