

FOREIGN AIR AND SEA ARRIVALS

MARCH 2019 VS 2018

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

	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%
Grand Total	1,994,296	1,775,380	12.3%	482,626	411,308	17.3%

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 12.3% between January to March 2019 compared to the same period of 2018.
- Foreign air arrivals by themselves were up by 17.3% between January to March 2019 compared to the same period of 2018.

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

	2019	2018	2019/2018	2019	2018	2019/2018
	Air and Sea			Air Only		
			% Chg Air/Sea			% Chg Air
Nassau/Paradise Island	1,237,560	974,816	27.0%	369,926	303,825	21.8%
Grand Bahama	162,663	201,966	-19.5%	20,065	19,937	0.6%
Abaco	117,875	121,052	-2.6%	32,408	30,945	4.7%
Andros	2,570	2,936	-12.5%	2,538	2,874	-11.7%
Berry Islands	148,083	151,235	-2.1%	2,731	2,313	18.1%
Bimini	23,279	24,852	-6.3%	5,156	8,265	-37.6%
Cat Cay	2,354	2,455	-4.1%	1,011	1,168	-13.4%
Cat Island	304	283	7.4%	292	266	9.8%
Eleuthera	144,550	128,312	12.7%	20,950	17,744	18.1%
Exuma	21,691	18,267	18.7%	21,434	17,999	19.1%
Half Moon Cay	126,924	142,576	-11.0%	-	-	0.0%
Inagua	321	633	-49.3%	154	19	710.5%
Long Island	484	470	3.0%	445	458	-2.8%
San Salvador	5,638	5,527	2.0%	5,516	5,495	0.4%
Bahamas Overall	1,994,296	1,775,380	12.3%	482,626	411,308	17.3%

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

The Easter holiday weekend is normally a huge time for travel to the Bahamas. Arrivals to the island would have been heavily impacted in March 2019 by the fact that the Easter Holiday weekend fell completely in April 2019 and not in March. For many Universities in the USA, Spring Break normally falls in March 2019 or April and for this reason in part, arrivals to some of the islands in the Bahamas did very well.

All numbers are subject to revision.

- Foreign air and sea arrivals were up in January, February and March 2019 compared to the same period of 2018. Foreign arrivals (1st port of entry) were up in the following islands: Nassau/Paradise Island, Cat Island, Eleuthera, Exuma, Long Island and San Salvador between January to March 2019.
- The Easter Holiday fell between two months in 2018; it began on March 30th (Good Friday) and went into April 2018. In 2019, the Easter Holiday fell completely in April.

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

ISLANDS UP 2019 YTD

- Foreign Arrivals to Nassau/Paradise Island were up 27% between January to March 2019 YTD, and air arrivals by themselves to the island were up by 21.8%. Air arrivals to Nassau/P.I. were up in every month of 2018 compared to 2017, and this trend continued into March 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. Moreover, some of the major cruise lines decided to sail to Nassau/Paradise Island as a 1st port of call before they traveled to other Islands in the Bahamas: Carnival Cruises, Celebrity Cruises, Costa Cruises, Holland America Cruises, and Royal Caribbean all did this;
- Cat Island arrivals up 7.4%;
- Eleuthera up 12.7%
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 18.1%. In addition, Carnival Cruises increased their calls on Princess Cay (Eleuthera) during the period;
- Exuma up 18.7%;
- Long Island up 3.0%;
- San Salvador up 2.0%.

ISLANDS DOWN 2019 YTD

- Abaco down 2.6%;
- Andros down 12.5%;
- Berry Islands down 2.1%;

ISLANDS DOWN 2019 YTD CONT'D

- Bimini down 6.3%;
- Cat Cay down 4.1%;
- Foreign arrivals to Grand Bahama were down by 19.5%, but air arrivals by themselves were up by 0.6% between January to March 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 March 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 and routing schedules would have been partially responsible for this decline in cruise arrivals as ships to the island were re-routed or cancelled as in the month of February. The following cruise lines brought in fewer cruise visitors (1st port of entry) to GBI than in the previous period: Carnival Cruises (a decline of 32.6%), and Royal Caribbean Int'l (-34.3%). The number of cruise calls made on Grand Bahama between January to March 2019 did increase by 29.3%, 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 11.0%;
- Inagua was down 49.3%. 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 three months of 2019.

FOREIGN AIR AND SEA ARRIVALS**MARCH 2019 VS 2018****FOREIGN AIR AND SEA ARRIVALS TO THE BAHAMAS
1ST PORT OF ENTRY ONLY
MARCH 2019**

	2019	2018	2019/2018	2019	2018	2019/2018
	Air and Sea		% Chg Air/Sea	Air Only		% Chg Air
Nassau/Paradise Island	475,630	393,338	20.9%	152,968	134,042	14.1%
Grand Bahama	66,073	67,240	-1.7%	7,488	8,292	-9.7%
Abaco	33,960	52,407	-35.2%	15,324	16,196	-5.4%
Andros	1,148	1,213	-5.4%	1,142	1,190	-4.0%
Berry Islands	53,676	61,913	-13.3%	1,344	1,164	15.5%
Bimini	11,366	13,132	-13.4%	2,367	3,800	-37.7%
Cat Cay	1,038	1,288	-19.4%	468	580	-19.3%
Cat Island	139	136	2.2%	139	119	16.8%
Eleuthera	53,994	55,418	-2.6%	9,632	8,853	8.8%
Exuma	8,724	7,710	13.2%	8,599	7,579	13.5%
Half Moon Cay	41,084	51,255	-19.8%	-	-	0.0%
Inagua	111	119	-6.7%	59	4	1375.0%
Long Island	267	211	26.5%	246	205	20.0%
San Salvador	1,834	2,113	-13.2%	1,802	2,093	-13.9%
Bahamas Overall	749,044	707,493	5.9%	201,578	184,117	9.5%

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. The ferry/cruise ship service into Bimini brought in both cruise visitors and sea landed arrivals (stopovers).

- Foreign arrivals for the Bahamas Overall were up by 5.9% during the month of March 2019 compared to March 2018 and air arrivals by themselves were up by 9.5%.
- In 2018, the Easter Holiday fell between two months; it began on March 30th (Good Friday) and went into April 2018.
- In 2019, the Easter Holiday fell completely in April. The month that contains the Easter Holiday usually receives a heavy influx of visitors because it is a huge time for travel.

ISLANDS UP MARCH

- Foreign arrivals (1st port of entry) to Nassau/Paradise Island were up by 20.9% during the month of March 2019 compared to 2018. Arrivals to Nassau/Paradise Island increased significantly during the month of March because both air and sea arrivals to the island performed well. Air arrivals by themselves were up by 14.1% and sea arrivals were up by 24.4%. 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, MSC Cruises, and Royal Caribbean increased the number of calls that they made on Nassau/Paradise Island as a 1st port of entry in March 2019 compared to March 2018.
- Cat Island up 2.2%;
- Exuma up 13.2%;
- Long Island up 26.5%.

ISLANDS DOWN MARCH

- Grand Bahama foreign arrivals were down by 1.7% (cruise arrivals were up, but sea landed arrivals were down), and air arrivals by themselves in March 2019 were also down. The increase in cruise arrivals to the island (1st port of entry) were not enough to counteract the decline in the sea landed visitors to the island during the month and for this reason sea arrivals to the island were down. The Easter Holiday fell completely in April 2019 but in 2018, it fell between both March and April. The Easter Holiday which is a huge time to travel for visitors to the Bahamas would have been part of the reason for the decline in arrivals to the island during the month;
- Abaco down 35.2%;
- Andros down 5.4%;
- Berry Islands down 13.3% but air arrivals to the island were up by 15.5%. Norwegian cruise lines significantly decreased the number of calls to their private island Great Stirrup Cay, Berry Islands in March 2019 as a 1st port of call;
- Bimini down 13.4%;
- Cat Cay down 19.4%;
- Eleuthera foreign arrivals were down by 2.6% however, air arrivals by themselves were up 8.8% because there was an increase in airlift into North Eleuthera from the US in 2018;
- Half Moon Cay (cruise port only) down 19.8%;
- Inagua down 6.7%;
- San Salvador down 13.2%.

Air Arrivals March 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 March 2019.

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

In March 2019, air arrivals to Nassau/Paradise Island were up by 14.1% compared to March 2018 and by the end of March 2019 YTD, they were up by 21.8%. The air arrivals to Nassau/Paradise Island continued the upward trend that had begun in 2018 as they moved full speed ahead.

In March 2019, air arrivals to the Bahamas were up, but did not have the really significant growth that it had been having in the early months of 2019 because the Easter Holiday did not fall during the month. Air arrivals to some of the Islands of The Bahamas in March 2019 were impacted by the fact that the Easter Holiday fell completely in April 2019 compared to 2018 when it fell between the months of March and April. In March 2019, air arrivals to the Bahamas were up by 9.5% and by March 2019 YTD it was up by 17.3%.

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 March 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%
Mar	85.8%	75.2%	\$ 345.64	\$ 317.64	\$ 296.49	\$ 239.00	28%	14%	17%
YTD	77.8%	63.8%	\$ 298.62	\$ 274.35	\$ 232.24	\$ 174.99	37%	22%	26%

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 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 March 2019. The room nights sold for the large hotels as a whole also increased in every month of 2018 and into January and March 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 January to March 2019 YTD, room revenue increased by 37% compared to the same period of 2018 and room nights sold increased by 26%.

APPENDIX

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

	January to March		
	2019	2018	% CHG
January	498,913	426,260	17.0%
February	445,622	395,926	12.6%
March	530,038	504,208	5.1%
Total YTD	1,474,573	1,326,394	11.2%

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 March 2019, but not every island experienced it. Cruise arrivals were up by 11.2% between January to March 2019 YTD and up 5.1% in the month of March 2019.
- By March 2019 YTD, cruise arrivals (1st port of entry) were up in Nassau/Paradise Island (+29.5%), Bimini (+7.8%), and Eleuthera (+11.8%).

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

	JANUARY TO MARCH 2018		
	2019	2018	%CHG 19/18
Nassau/Paradise Island	863,709	667,021	29.5%
Grand Bahama	128,329	164,757	-22.1%
Abaco (Castaway Cay)	83,530	88,682	-5.8%
Andros	-	-	0.0%
Berry Islands	143,565	147,888	-2.9%
Bimini	5,228	4,848	7.8%
Cat Cay	-	-	0.0%
Cat Island	-	-	0.0%
Eleuthera (Princess Cay & Oth)	123,288	110,293	11.8%
Exuma	-	-	0.0%
Half Moon Cay	126,924	142,576	-11.0%
Inagua	-	329	-100.0%
Long Island	-	-	0.0%
San Salvador	-	-	0.0%
Bahamas Overall	1,474,573	1,326,394	11.2%

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 March 2019 YTD were down in Grand Bahama, Abaco, Berry Islands, 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, so February 2018 had been a positive anomaly.

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

	MARCH 2019 ONLY		
	2019	2018	%CHG 19/18
Nassau/Paradise Island	321,036	257,428	24.7%
Grand Bahama	52,120	50,819	2.6%
Abaco (Castaway Cay)	17,793	35,657	-50.1%
Andros	-	-	0.0%
Berry Islands	51,334	60,248	-14.8%
Bimini	2,493	2,377	4.9%
Cat Cay	-	-	0.0%
Cat Island	-	-	0.0%
Eleuthera (Princess Cay & Oth)	44,178	46,424	-4.8%
Exuma	-	-	0.0%
Half Moon Cay	41,084	51,255	-19.8%
Inagua	-	-	0.0%
Long Island	-	-	0.0%
San Salvador	-	-	0.0%
Bahamas Overall	530,038	504,208	5.1%

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 5.1% in the month of March 2019. Despite this increase for the Bahamas as a whole, the following islands suffered declines in cruise arrivals (1st port of entry) during the month: Abaco (-50.1%), Berry Islands (-14.8%), Princess Cay, Eleuthera (-4.8%) and Half Moon Cay (-19.8%).
- Although cruise arrivals (1st port of entry) to Grand Bahama were up in March 2019, the increase was not enough to counteract the decline that had already happened in January and February 2019 and for this reason, they were down by the end of March 2019 YTD.

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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