

FOREIGN AIR AND SEA ARRIVALS

MAY 2019 VS 2018

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

	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%
Grand Total	3,241,015	2,863,114	13.2%	812,534	691,442	17.5%

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 May 2019 YTD compared to the same period of 2018.
- Foreign air arrivals by themselves were up by 17.5% between January to May 2019 YTD compared to the same period of 2018.

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

	2019	2018	2019/2018	2019	2018	2019/2018
	Air and Sea		% Chg Air/Sea	Air Only		% Chg Air
Nassau/Paradise Island	1,959,075	1,588,168	23.4%	616,575	508,337	21.3%
Grand Bahama	268,314	321,441	-16.5%	31,743	32,519	-2.4%
Abaco	185,689	201,559	-7.9%	60,487	56,016	8.0%
Andros	4,615	5,231	-11.8%	4,560	5,131	-11.1%
Berry Islands	341,490	263,597	29.6%	5,291	3,970	33.3%
Bimini	44,492	43,464	2.4%	10,302	13,307	-22.6%
Cat Cay	4,964	4,316	15.0%	2,277	1,922	18.5%
Cat Island	724	566	27.9%	675	549	23.0%
Eleuthera	200,994	183,253	9.7%	35,912	30,499	17.7%
Exuma	35,220	30,137	16.9%	34,629	29,616	16.9%
Half Moon Cay	184,594	210,783	-12.4%	-	-	0.0%
Inagua	704	910	-22.6%	284	34	735.3%
Long Island	887	788	12.6%	761	702	8.4%
San Salvador	9,253	8,901	4.0%	9,038	8,840	2.2%
Bahamas Overall	3,241,015	2,863,114	13.2%	812,534	691,442	17.5%

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

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

ISLANDS UP 2019 YTD

- Foreign Arrivals to Nassau/Paradise Island were up 23.4% between January to May 2019 YTD, and air arrivals by themselves to the island were up by 21.3%. Air arrivals to Nassau/P.I. were up in every month of 2018 compared to 2017, and this trend continued into May 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.
- Berry Islands up 29.6%;
- Bimini up 2.4%;
- Cat Cay up 15.0%;
- Cat Island arrivals up 27.9%;
- Eleuthera up 9.7%
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 17.7%;
- Exuma up 16.9%;
- Long Island up 12.6%;
- San Salvador up 4.0%.

ISLANDS DOWN 2019 YTD

- Abaco was down 7.9% primarily because Disney Cruise Lines reduced the number of calls on the island between January to May 2019 compared to 2018. Air arrivals on their own however, were up by 8.0%;
- Andros down 11.8%;
- Foreign arrivals to Grand Bahama were down by 16.5%, and air arrivals by themselves were also down by 2.4% between January to May 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” before they crawled back up slightly in April only to fall again in May 2019.
 - Between January to May 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 during the period. 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 23.7%), and Royal Caribbean Int’l (-7.5%). The number of cruise calls made on Grand Bahama between January to May 2019 did increase by 13.1%, 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 12.4%;
- Inagua down 22.6% for May YTD, but air arrivals to the island were up significantly for this period. Arrivals for the month of May only however were up significantly.

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

	2019	2018	2019/2018	2019	2018	2019/2018
	Air and Sea		% Chg Air/Sea	Air Only		% Chg Air
Nassau/Paradise Island	329,357	294,597	11.8%	118,323	98,419	20.2%
Grand Bahama	57,232	53,405	7.2%	5,586	6,535	-14.5%
Abaco	32,260	31,059	3.9%	14,132	12,635	11.8%
Andros	945	1,053	-10.3%	941	1,034	-9.0%
Berry Islands	98,060	52,886	85.4%	1,177	786	49.7%
Bimini	10,832	9,441	14.7%	2,710	2,520	7.5%
Cat Cay	1,417	812	74.5%	677	340	99.1%
Cat Island	172	144	19.4%	165	144	14.6%
Eleuthera	26,923	20,165	33.5%	7,113	6,064	17.3%
Exuma	6,163	5,901	4.4%	6,027	5,795	4.0%
Half Moon Cay	23,658	28,527	-17.1%	-	-	0.0%
Inagua	226	104	117.3%	79	6	1216.7%
Long Island	139	143	-2.8%	125	111	12.6%
San Salvador	1,718	1,721	-0.2%	1,686	1,703	-1.0%
Bahamas Overall	589,102	499,958	17.8%	158,741	136,092	16.6%

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 17.8% during the month of May 2019 compared to May 2018 and air arrivals by themselves were up by 16.6%.
- Foreign arrivals to Nassau/Paradise Island were up significantly in May 2019.

ISLANDS UP MAY

- Foreign arrivals (1st port of entry) to Nassau/Paradise Island were up by 11.8% during the month of May 2019 compared to 2018. Arrivals to Nassau/Paradise Island increased significantly during the month of May because both air and sea arrivals to the island performed well. Air arrivals by themselves were up by 20.2% and sea arrivals were up by 7.6%. The increase in air arrivals to the island during the month was impacted in part by the Bahamas Carnival which took place in the early days of May 2019. In the early days of the month, there was a marked increase in air arrivals as visitors flew into Nassau/Paradise Island to enjoy the Bahamas Carnival which took place between May 3rd and May 5th2019. Between May 1st to May 4th2019, air arrivals to Nassau/Paradise Island soared by 38%.
- Grand Bahama foreign arrivals were up by 7.2%, but air arrivals by themselves in May 2019 were down by 14.5%.
- Abaco arrivals were up 3.9%, and air arrivals on their own were up significantly by 11.8%;
- Berry Islands up 85.4% and air arrivals by themselves up 49.7%;
- Bimini up 14.7% during the month.
 - Sea arrivals continued to outpace the air arrivals to the island as visitors preferred to travel on the ocean instead of by a plane;
- Cat Cay up 74.5%;
- Cat Island up 19.4%;
- Eleuthera foreign arrivals were up by 33.5%, and air arrivals by themselves were up 17.3% because there was an increase in airlift into North Eleuthera from the US in 2018;
- Exuma up 4.4%;
- Inagua up 117.3% because the island received more boaters/yachters than in the past. In addition, the air arrivals by themselves increased significantly because the owners of these yachts flew in by plane.

ISLANDS DOWN MAY

- Andros down 10.3%;
- Half Moon Cay (cruise port only) down 17.1%;
- Long Island down 2.8%;
- San Salvador down 0.2%.

Air Arrivals May 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 May 2019. By the end of 2018, air arrivals to Nassau/Paradise Island were up by 19.2%.

In May 2019, air arrivals to Nassau/Paradise Island were up by 20.2% compared to May 2018 and by the end of May 2019 YTD, they were up by 21.3%. In the early days of the month, there was a marked increase in air arrivals as visitors flew into Nassau/Paradise Island to enjoy the Bahamas Carnival which took place between May 3rd and May 5th 2019. Between May 1st to May 4th 2019, air arrivals to Nassau/Paradise Island soared by 38%.

In May 2019, air arrivals were up significantly not only to Nassau/Paradise Island but to the Bahamas overall. In May 2019, air arrivals to the Bahamas overall were up by 16.6%, and by May 2019 YTD they were up by 17.5%.

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 May 2017 and the SLS which softly opened in December 2017). All of these hotels would have been in full operation in 2018 & in May 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%
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%
YTD	76.8%	65.5%	\$ 288.08	\$ 262.22	\$ 221.39	\$ 171.72	33%	21%	21%

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 May 2019. The room nights sold for the large hotels as a whole also increased in every month of 2018 and into May 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 January to May 2019 YTD, room revenue increased by 33% compared to the same period of 2018 and room nights sold increased by 21%.

APPENDIX

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

	January to May		
	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%
Total YTD	2,359,616	2,103,059	12.2%

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 May 2019, but not every island experienced it. Cruise arrivals were up by 12.2% between January to May 2019 YTD and up 18.8% in the month of May 2019.
- By May 2019 YTD, cruise arrivals (1st port of entry) were up in Nassau/Paradise Island (+24.5%), Berry Islands (+29.1%), Bimini (+13.2%), and Eleuthera (+8.1%).

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

	JANUARY TO MAY 2018		
	2019	2018	%CHG 19/18
Nassau/Paradise Island	1,336,227	1,073,444	24.5%
Grand Bahama	209,886	257,080	-18.4%
Abaco (Castaway Cay)	120,877	142,050	-14.9%
Andros	-	-	0.0%
Berry Islands	333,052	257,938	29.1%
Bimini	10,440	9,219	13.2%
Cat Cay	-	-	0.0%
Cat Island	-	-	0.0%
Eleuthera (Princess Cay & Oth)	164,540	152,216	8.1%
Exuma	-	-	0.0%
Half Moon Cay	184,594	210,783	-12.4%
Inagua	-	329	-100.0%
Long Island	-	-	0.0%
San Salvador	-	-	0.0%
Bahamas Overall	2,359,616	2,103,059	12.2%

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 May 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.

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

	MAY 2019 ONLY		
	2019	2018	%CHG 19/18
Nassau/Paradise Island	209,966	195,226	7.6%
Grand Bahama	45,237	39,477	14.6%
Abaco (Castaway Cay)	16,530	17,464	-5.3%
Andros	-	-	0.0%
Berry Islands	96,246	51,631	86.4%
Bimini	2,606	2,118	23.0%
Cat Cay	-	-	0.0%
Cat Island	-	-	0.0%
Eleuthera (Princess Cay & Oth)	19,701	13,949	41.2%
Exuma	-	-	0.0%
Half Moon Cay	23,658	28,527	-17.1%
Inagua	-	-	0.0%
Long Island	-	-	0.0%
San Salvador	-	-	0.0%
Bahamas Overall	413,944	348,392	18.8%

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 18.8% in the month of May 2019. Most of the islands had increases in cruise arrivals during the month. The following islands suffered declines in cruise arrivals (1st port of entry) during the month: Abaco (-5.3%), and Half Moon Cay (-17.1%).

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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