

FOREIGN AIR AND SEA ARRIVALS

JANUARY TO APRIL 2018 VS 2017

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

	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%
Grand Total	2,363,156	2,308,957	2.3%	555,350	486,624	14.1%

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 1ST PORT OF ENTRY ONLY JANUARY TO APRIL 2018

	2018	2017	2018/2017	2018	2017	2018/2017
	Air and Sea			Air Only		
			% Chg Air/Sea			% Chg Air
Nassau/Paradise Island	1,293,571	1,349,831	-4.2%	409,918	351,907	16.5%
Grand Bahama	268,036	262,367	2.2%	25,984	28,360	-8.4%
Abaco	170,500	180,786	-5.7%	43,381	36,379	19.2%
Andros	4,178	3,913	6.8%	4,097	3,783	8.3%
Berry Islands	210,711	221,161	-4.7%	3,184	2,506	27.1%
Bimini	34,023	30,417	11.9%	10,787	10,978	-1.7%
Cat Cay	3,504	3,672	-4.6%	1,582	1,861	-15.0%
Cat Island	422	523	-19.3%	405	486	-16.7%
Eleuthera	163,088	59,507	174.1%	24,435	19,217	27.2%
Exuma	24,236	24,926	-2.8%	23,821	24,338	-2.1%
Half Moon Cay	182,256	164,522	10.8%	-	-	0.0%
Inagua	806	458	76.0%	28	39	-28.2%
Long Island	645	505	27.7%	591	480	23.1%
San Salvador	7,180	6,369	12.7%	7,137	6,290	13.5%
Bahamas Overall	2,363,156	2,308,957	2.3%	555,350	486,624	14.1%

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


In the 1st four months of 2018, foreign air and sea arrivals were up by 2.3% and air arrivals by themselves, were up by 14.1%. The amount of boaters/yachters and sea landed visitors (sea arrivals are made up of cruise, sea landed arrivals and boaters/yachters) that sailed to the Bahamas increased during the 1st four months of 2018, although this increase did not occur in all of the months. The increase in air and sea landed arrivals to the Bahamas in the 1st qtr. of the year would have been impacted by the Easter Holiday which occurred between March 30, and April 1, 2018. The Easter Holiday is always a big travel period for visitors to come to the destination. The fact that the Easter holiday fell primarily in March 2018 instead of April as it had in 2017, did significantly impact the number of foreign arrivals into the destination during the month of April 2018. Many of the travelers that wanted to take advantage of the holiday would have come into


the destination during the month of March instead of April. Air stopovers and sea stopovers like boaters/yachters took advantage of that holiday and primarily traveled to the Bahamas in March instead of in April 2018.

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. Cruise arrivals did increase ever so slightly during the month of April 2018 because the cruise lines made more calls on the Out Islands than in the same period of 2017; this increase was not replicated in Nassau/Paradise Island and Grand Bahama. This increase in cruise arrivals to the Out Island in April neutralized the fall off in cruise arrivals to Nassau/Paradise Island and Grand Bahama during the month.

In the month of April 2018, there was strong growth in the cruise arrivals by 1st port of entry to the Out Islands (up 43.2%) but Nassau/Paradise Island and Grand Bahama did not experience this same growth. Because of the strong growth in cruise arrivals to the Out Islands during the month of April, cruise arrivals to the Bahamas as a whole were up slightly by 0.2%.

Many Islands of the Bahamas experienced increases by the end of the 1st four months of 2018:

- **Foreign arrivals were up at the end of the 1st four months of 2018 in:** 
 - The Bahamas overall were up by 2.3% and air arrivals only were up by 14.1%;
 - Grand Bahama arrivals were up 2.2%
Foreign arrivals overall to the island were up 2.2%, but air arrivals to Grand Bahama were down by -8.4% for the 1st four months of 2018. 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. Air arrivals to the island were only up in the month of March which happened to be the month of the Easter Holiday;
 - The Out Islands were up by 15.0% for the period of January to April 2018
Foreign Arrivals were up in most of the major Out Islands during the 1st four months of the year;
 - Andros (up 6.8%);
 - Bimini (up 11.9%);
 - Eleuthera (up 174.1%)
Foreign arrivals to Eleuthera were up 174.1% in part because Carnival Cruises and Princess Cruises both significantly increased the number of calls and cruise arrivals to Princess Cay, Eleuthera in the 1st four months of 2018 (as a 1st port of call) compared to the same period of 2017. In addition, air arrivals to Eleuthera significantly increased by 27.2% in the 1st four months of 2018 compared to the same period of 2017. 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;
 - Half Moon Cay (up 10.8%) is a cruise port only;
 - Inagua (up 76%);
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 four months of the year;
 - Long Island (up by 27.7%);
 - San Salvador (up 12.7%).

- **Foreign arrivals were down at the end of the 1st four months of 2018 in:** 
 - Nassau/Paradise Island (down 4.2%),
Arrivals were down by -4.2% to Nassau/Paradise Island overall but air arrivals by themselves to the island were up by 16.5%. The decline in foreign arrivals to Nassau/Paradise Island, was influenced by the reduction in cruise calls by several cruise lines during the months of February, March, and April 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 February, March, and April 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 1st four months of 2018;
 - Abaco arrivals were down -5.7% in part because Disney Cruises reduced the amount of cruise visitors that they brought into the island during the 1st four months of 2018 (as a 1st port of call). Air arrivals however, for the first four months were up by 19.2%;
 - Berry Islands arrivals were down by -4.7% primarily because Royal Caribbean Int'l reduced the amount of cruise visitors that they brought into Coco Cay, Berry Islands during every month of the 1st four months of the year including April 2018 compared to the same period of 2017 by 1st port of call (number of cruise arrivals brought into the island by RCL reduced by 48% between January to April 2018);
 - Cat Cay (down by -4.6%);
 - Cat Island (down by -19.3%);
 - Exuma (down by -2.8%).

FOREIGN AIR AND SEA ARRIVALS

APRIL 2018 VS 2017

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

	2018	2017	2018/2017	2018	2017	2018/2017
	Air and Sea			Air Only		% Chg Air
Nassau/Paradise Island	318,755	357,582	-10.9%	106,093	97,633	8.7%
Grand Bahama	66,070	70,183	-5.9%	6,047	7,401	-18.3%
Abaco	49,448	34,758	42.3%	12,436	11,839	5.0%
Andros	1,242	1,323	-6.1%	1,223	1,283	-4.7%
Berry Islands	59,476	46,279	28.5%	871	803	8.5%
Bimini	9,171	9,920	-7.6%	2,522	3,543	-28.8%
Cat Cay	1,049	1,469	-28.6%	414	851	-51.4%
Cat Island	139	212	-34.4%	139	207	-32.9%
Eleuthera	34,776	5,686	511.6%	6,691	5,578	20.0%
Exuma	5,969	7,494	-20.3%	5,822	7,245	-19.6%
Half Moon Cay	39,680	45,573	-12.9%	-	-	0.0%
Inagua	173	109	58.7%	9	11	-18.2%
Long Island	175	97	80.4%	133	97	37.1%
San Salvador	1,653	1,608	2.8%	1,642	1,584	3.7%
Bahamas Overall	587,776	582,293	0.9%	144,042	138,075	4.3%

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 0.9% during the month of April 2018 compared to April 2017, air arrivals were also up by 4.3%.

Foreign Arrivals for April 2018 Up:

- Foreign arrivals to the Out Islands increased in April 2018 and were up by 31.3% primarily because of the increase in cruise arrivals during the month. Air arrivals to the Out Islands in April however slipped for the 1st time in the 1st four months of 2018 by -3.4% and this decline in air arrivals would have largely been influenced by the fact that the Easter Holiday fell primarily in March instead of April. In 2017, the Easter Holiday fell in April;
- Abaco arrivals were up by 42.3% in April 2018 because Disney Cruise lines brought in more cruise visitors to the island as a 1st port of call than in April 2017, and air arrivals were also up by 5% during the month;
- In April 2018, foreign arrivals to the Berry Islands were up by 28.5% and air arrivals to the Berry Islands were up by 8.5% compared to the same period of 2017;
- Eleuthera arrivals were up 511.6% because Carnival Cruises and Princess Cruises made significantly more calls on the island than they had in 2017; air arrivals were also up by 20.0% because of an increase in airlift into North Eleuthera from the US;
- Inagua (up 58.7%);
- Long Island (up 80.4%), air arrivals also up by 37.1%;
- San Salvador (up 2.8%), air arrivals also up by 3.7%.

Foreign Arrivals for April 2018 Down:

- Nassau/Paradise Island foreign arrivals down by -10.9%, air arrivals however were up by 8.7%;
- Grand Bahama arrivals down by -5.9%;
- Andros arrivals down by -6.1%, air arrivals also down by -4.7%;
- Bimini arrivals down by -7.6%, air arrivals were down for the month by -28.8%;
- Cat Cay arrivals down by -28.6%, air arrivals also down by -51.4%;
- Cat Island arrivals down by -34.4%, air arrivals also down by -32.9%;
- Exuma arrivals down by -20.3%, air arrivals also down by -19.6%. In April 2017, the ill-fated Fyre Festival attracted many visitors to the island of Exuma; there was no such festival in April 2018. In addition, the Easter Holiday fell in March 2018 but in 2017 it had fallen in April;
- Half Moon Cay arrivals down by -12.9%, this is a cruise only port;

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 April 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%
Apr	72.4%	75.6%	\$265.17	\$ 282.84	\$192.04	\$213.71	20%	9%	28%
YTD	65.9%	70.3%	\$271.28	\$ 256.42	\$178.78	\$180.32	34%	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. 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 January to April 2018 compared to the same period of 2017. The room nights sold also increased in every month during the first four 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 January to April 2018 YTD, room revenue increased by 34% 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 APRIL 2018 AND 2017

	January to April 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%
Total YTD	1,754,667	1,771,409	-0.9%

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 four months of the year. Cruise arrivals for the month of April 2018 were up compared to the same period of 2017, but it was not enough to neutralize the decline in cruise arrivals during the months of February and March 2018.

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

	JANUARY TO APRIL 2018		
	2018	2017	%CHG 18/17
Nassau/Paradise Island	878,218	992,233	-11.5%
Grand Bahama	217,603	208,418	4.4%
Abaco (Castaway Cay)	124,586	141,525	-12.0%
Andros	-	-	0.0%
Berry Islands	206,307	218,144	-5.4%
Bimini	7,101	6,604	7.5%
Cat Cay	-	-	0.0%
Cat Island	-	-	0.0%
Eleuthera (Princess Cay & Oth)	138,267	39,963	246.0%
Exuma	-	-	0.0%
Half Moon Cay	182,256	164,522	10.8%
Inagua	329	-	100.0%
Long Island	-	-	0.0%
San Salvador	-	-	0.0%
Bahamas Overall	1,754,667	1,771,409	-0.9%

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
APRIL 2018

	APRIL 2018 ONLY		
	2018	2017	%CHG 18/17
Nassau/Paradise Island	211,197	258,627	-18.3%
Grand Bahama	52,846	54,189	-2.5%
Abaco (Castaway Cay)	35,904	21,826	64.5%
Andros	-	-	0.0%
Berry Islands	58,419	45,267	29.1%
Bimini	2,253	1,987	13.4%
Cat Cay	-	-	0.0%
Cat Island	-	-	0.0%
Eleuthera (Princess Cay & Oth)	27,974	-	100.0%
Exuma	-	-	0.0%
Half Moon Cay	39,680	45,573	-12.9%
Inagua	-	-	0.0%
Long Island	-	-	0.0%
San Salvador	-	-	0.0%
Bahamas Overall	428,273	427,469	0.2%

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.

Princess Cay did not receive any cruise visitors to the island by 1st port of entry in April 2017.

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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