

FOREIGN AIR AND SEA ARRIVALS

APRIL 2019 VS 2018

1ST PORT OF ENTRY ONLY JANUARY TO APRIL

	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%
Grand Total	2,651,913	2,363,156	12.2%	653,793	555,350	17.7%

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 12.2% between January to April 2019 YTD compared to the same period of 2018.
- Foreign air arrivals by themselves were up by 17.7% between January to April 2019 YTD compared to the same period of 2018.

FOREIGN AIR AND SEA ARRIVALS TO THE BAHAMAS

1ST PORT OF ENTRY ONLY JANUARY TO APRIL 2019

	2019	2018	2019/2018	2019	2018	2019/2018
	Air and Sea			Air Only		
			% Chg Air/Sea			% Chg Air
Nassau/Paradise Island	1,629,718	1,293,571	26.0%	498,252	409,918	21.5%
Grand Bahama	211,082	268,036	-21.2%	26,157	25,984	0.7%
Abaco	153,429	170,500	-10.0%	46,355	43,381	6.9%
Andros	3,670	4,178	-12.2%	3,619	4,097	-11.7%
Berry Islands	243,430	210,711	15.5%	4,114	3,184	29.2%
Bimini	33,660	34,023	-1.1%	7,592	10,787	-29.6%
Cat Cay	3,547	3,504	1.2%	1,600	1,582	1.1%
Cat Island	552	422	30.8%	510	405	25.9%
Eleuthera	174,071	163,088	6.7%	28,799	24,435	17.9%
Exuma	29,057	24,236	19.9%	28,602	23,821	20.1%
Half Moon Cay	160,936	182,256	-11.7%	-	-	0.0%
Inagua	478	806	-40.7%	205	28	632.1%
Long Island	748	645	16.0%	636	591	7.6%
San Salvador	7,535	7,180	4.9%	7,352	7,137	3.0%
Bahamas Overall	2,651,913	2,363,156	12.2%	653,793	555,350	17.7%

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

In April 2019, some hotels in the Bahamas received less spring breakers than in April 2018 and for this reason the significant growth in arrivals was somewhat tempered for the period. The Easter Holiday fell late in the month of April 2019, and although some Universities have spring break in April, most of the American Universities appear to celebrate this monumental occasion in the month of March and into the 2nd week of April. The Easter Holiday fell in the 3rd week of April 2019 and so some spring breakers would have already taken their break.

- Foreign air and sea arrivals were up in January, February, March, and April 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, Cat Cay, Cat Island, Eleuthera, Exuma, Long Island and San Salvador between January to April 2019 YTD.
- The Easter Holiday fell between two months in 2018; it began on April 30th (Good Friday) and went into April 2018. In 2019, the Easter Holiday fell completely in late April.

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

ISLANDS UP 2019 YTD

- Foreign Arrivals to Nassau/Paradise Island were up 26% between January to April 2019 YTD, and air arrivals by themselves to the island were up by 21.5%. Air arrivals to Nassau/P.I. were up in every month of 2018 compared to 2017, and this trend continued into April 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 increased the number of calls or visitors on Nassau/Paradise Island as a 1st port of call in 2019 YTD compared to 2018 YTD: Carnival Cruises, Celebrity Cruises, Costa Cruises, Holland America Cruises, MSC Cruises, and Royal Caribbean all did this;
- Berry Islands up 15.5%;
- Cat Cay up 1.2%;
- Cat Island arrivals up 30.8%;
- 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 17.9%. In addition, Carnival and Princess Cruises increased their calls on Princess Cay (Eleuthera) during the period;
- Exuma up 19.9%;
- Long Island up 16.0%;
- San Salvador up 4.9%.

ISLANDS DOWN 2019 YTD CONT'D

- Abaco was down 10% primarily because Disney Cruise Lines reduced the number of calls on the island between January to April 2019 compared to 2018. Air arrivals on their own however, were up by 6.9%;
- Andros down 12.2%;
- Bimini down 1.1%;
- Foreign arrivals to Grand Bahama were down by 21.2%, but air arrivals by themselves were up by 0.7% between January to April 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 2019.
 - Between January to April 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 35.3%), and Royal Caribbean Int'l (-34.3%). The number of cruise calls made on Grand Bahama between January to April 2019 did increase by 19.8%, 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 11.7%;
- Inagua was down 40.7% because they did not receive a cruise ship like in 2018 during the period.

FOREIGN AIR AND SEA ARRIVALS

APRIL 2019 VS 2018

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

	2019	2018	2019/2018	2019	2018	2019/2018
	Air and Sea			Air Only		
			% Chg Air/Sea			% Chg Air
Nassau/Paradise Island	392,158	318,755	23.0%	128,326	106,093	21.0%
Grand Bahama	48,419	66,070	-26.7%	6,092	6,047	0.7%
Abaco	35,554	49,448	-28.1%	13,947	12,436	12.2%
Andros	1,100	1,242	-11.4%	1,081	1,223	-11.6%
Berry Islands	95,347	59,476	60.3%	1,383	871	58.8%
Bimini	10,381	9,171	13.2%	2,436	2,522	-3.4%
Cat Cay	1,193	1,049	13.7%	589	414	42.3%
Cat Island	248	139	78.4%	218	139	56.8%
Eleuthera	29,521	34,776	-15.1%	7,849	6,691	17.3%
Exuma	7,366	5,969	23.4%	7,168	5,822	23.1%
Half Moon Cay	34,012	39,680	-14.3%	-	-	0.0%
Inagua	157	173	-9.2%	51	9	466.7%
Long Island	264	175	50.9%	191	133	43.6%
San Salvador	1,897	1,653	14.8%	1,836	1,642	11.8%
Bahamas Overall	657,617	587,776	11.9%	171,167	144,042	18.8%

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 or private boat/yacht when they could do so instead of by air, and for this reason air arrivals to the island were down significantly while sea arrivals to the island were up during the month. The ferry/cruise ship service into Bimini brought in both cruise visitors and sea landed arrivals (sbpovers).

- Foreign arrivals for the Bahamas Overall were up by 11.9% during the month of April 2019 compared to April 2018 and air arrivals by themselves were up by 18.8%.
- In 2018, the Easter Holiday fell between two months; it began on April 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. In April 2019, the Bahamas did receive a significant increase in visitors, but some hotels received less spring breakers during the month than in the same period of 2018 and for this reason the significant growth in arrivals was tempered. The Easter Holiday fell late in the month of April 2019, and although some Universities have spring break in April, most of the American Universities appear to celebrate this monumental occasion in the month of March and into the 2nd week of April. The Easter Holiday fell in the 3rd week of April 2019 and so some spring breakers would have already taken their break.

ISLANDS UP APRIL

- Foreign arrivals (1st port of entry) to Nassau/Paradise Island were up by 23.0% during the month of April 2019 compared to 2018. Arrivals to Nassau/Paradise Island increased significantly during the month of April because both air and sea arrivals to the island performed well. Air arrivals by themselves were up by 21.0% and sea arrivals were up by 24.1%. The increase in air arrivals to the island during the month was impacted in part by the fact that the Easter Holiday did fall during the month however, it is important to note that the island had been experiencing significant growth in the months prior to this holiday.
 - The significant increase in the sea arrivals to Nassau/P.I. during the month was due to the fact that some of the major cruise lines as listed below either increased the number of calls made on the island or simply brought in more visitors than they had in April 2018 even though they operated with the same amount of calls: Carnival Cruises, Celebrity Cruises, Disney Cruises, MSC Cruises, and Royal Caribbean;
- Berry Islands up 60.3% and air arrivals by themselves up 58.8%;
- Bimini up 13.2% 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;
 - This increase in arrivals to the island during the month of April was not enough to counteract the decline that had occurred during the month of March, hence January to April 2019 for the island experienced a decline.
- Cat Cay up 13.7%;
- Cat Island up 78.4%;
- Exuma up 23.4%;
- Long Island up 50.9%;
- San Salvador up 14.8%.

ISLANDS DOWN APRIL

- Grand Bahama foreign arrivals were down by 26.7%, but air arrivals by themselves in April 2019 were up by 0.7%.
- Abaco down 28.1% but air arrivals were up significantly by 12.2%;
- Andros down 11.4%;
- Eleuthera foreign arrivals were down by 15.1% however, air arrivals by themselves were up 17.3% because there was an increase in airlift into North Eleuthera from the US in 2018;
- Half Moon Cay (cruise port only) down 14.3%;
- Inagua down 9.2%.

Air Arrivals April 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 April 2019.

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

In April 2019, air arrivals to Nassau/Paradise Island were up by 21% compared to April 2018 and by the end of April 2019 YTD, they were up by 21.5%. The air arrivals to Nassau/Paradise Island continued the upward trend that had begun in 2018 as they continued to soar.

In April 2019, air arrivals were up significantly not only to Nassau/Paradise Island but to the Bahamas overall; the Easter Holiday fell during this month. In April 2019, air arrivals to the Bahamas overall were up by 18.8%, and by April 2019 YTD they were up by 17.7%.

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 April 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%
YTD	77.9%	66.0%	\$ 300.15	\$ 271.87	\$ 233.95	\$ 179.43	34%	22%	22%

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 January and April 2019. The room nights sold for the large hotels as a whole also increased in every month of 2018 and into January and April 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 January to April 2019 YTD, room revenue increased by 34% compared to the same period of 2018 and room nights sold increased by 22%.

APPENDIX

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

	January to April		
	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%
Total YTD	1,945,672	1,754,667	10.9%

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 April 2019, but not every island experienced it. Cruise arrivals were up by 10.9% between January to April 2019 YTD and up 10.0% in the month of April 2019.
- By April 2019 YTD, cruise arrivals (1st port of entry) were up in Nassau/Paradise Island (+28.2%), Berry Islands (+14.8%), Bimini (+10.3%), and Eleuthera (+4.8%).

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

	JANUARY TO APRIL 2018		
	2019	2018	%CHG 19/18
Nassau/Paradise Island	1,126,261	878,218	28.2%
Grand Bahama	164,649	217,603	-24.3%
Abaco (Castaway Cay)	104,347	124,586	-16.2%
Andros	-	-	0.0%
Berry Islands	236,806	206,307	14.8%
Bimini	7,834	7,101	10.3%
Cat Cay	-	-	0.0%
Cat Island	-	-	0.0%
Eleuthera (Princess Cay & Oth)	144,839	138,267	4.8%
Exuma	-	-	0.0%
Half Moon Cay	160,936	182,256	-11.7%
Inagua	-	329	-100.0%
Long Island	-	-	0.0%
San Salvador	-	-	0.0%
Bahamas Overall	1,945,672	1,754,667	10.9%

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 (1st port of entry) between January to April 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
APRIL 2019

	APRIL 2019 ONLY		
	2019	2018	%CHG 19/18
Nassau/Paradise Island	262,552	211,197	24.3%
Grand Bahama	36,320	52,846	-31.3%
Abaco (Castaway Cay)	20,817	35,904	-42.0%
Andros	-	-	0.0%
Berry Islands	93,241	58,419	59.6%
Bimini	2,606	2,253	15.7%
Cat Cay	-	-	0.0%
Cat Island	-	-	0.0%
Eleuthera (Princess Cay & Oth)	21,551	27,974	-23.0%
Exuma	-	-	0.0%
Half Moon Cay	34,012	39,680	-14.3%
Inagua	-	-	0.0%
Long Island	-	-	0.0%
San Salvador	-	-	0.0%
Bahamas Overall	471,099	428,273	10.0%

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 10.0% in the month of April 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: Grand Bahama (-31.3%), Abaco (-42.0%), Princess Cay, Eleuthera (-23.0%), and Half Moon Cay (-14.3%).

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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