

FOREIGN AIR AND SEA ARRIVALS: FEBRUARY 2018 VS 2017

In the last Qtr. of 2017, foreign air and sea arrivals performed very well, and this positive trend flowed into January of 2018. In February 2018, foreign air arrivals into the destination continued to soar and managed to outperform the January and February 2018 air arrivals. Air arrivals to the Bahamas in February 2018 were up by 17% compared to February 2017. The sea arrivals namely cruise arrivals however, slipped during the month of February 2018. This slip in cruise arrivals occurred primarily in Nassau/Paradise Island and the Berry Islands. One of the reasons for the slip in cruise arrivals during the month of February 2018 was the weather which caused rough seas in the Bahamas and negatively impacted ocean travel to the destination.

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

	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%
Grand Total	1,067,887	1,043,924	2.3%	227,191	202,526	12.2%

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 were revised

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

	2018	2017	2018/2017	2018	2017	2018/2017
	Air and Sea			Air Only		
			% Chg Air/Sea			% Chg Air
Nassau/Paradise Island	271,633	304,209	-10.7%	93,365	78,511	18.9%
Grand Bahama	61,444	54,187	13.4%	6,599	7,068	-6.6%
Abaco	39,376	38,386	2.6%	8,811	7,376	19.5%
Andros	985	844	16.7%	953	809	17.8%
Berry Islands	56,995	65,655	-13.2%	596	455	31.0%
Bimini	7,506	4,851	54.7%	2,642	2,379	11.1%
Cat Cay	884	761	16.2%	419	320	30.9%
Cat Island	87	122	-28.7%	87	109	-20.2%
Eleuthera	39,379	18,449	113.4%	5,343	4,041	32.2%
Exuma	5,680	5,554	2.3%	5,635	5,434	3.7%
Half Moon Cay	47,902	39,779	20.4%	-	-	0.0%
Inagua	408	46	787.0%	7	5	40.0%
Long Island	165	222	-25.7%	159	208	-23.6%
San Salvador	1,711	1,516	12.9%	1,699	1,493	13.8%
Bahamas Overall	534,155	534,581	-0.1%	126,315	108,208	16.7%

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 February 2018, a small ship the M/S Hamburg went to the island of Inagua. Inagua does not normally receive cruise ships.

In February 2018, Carnival Cruises made 7 calls on Princess Cay, Eleuthera as a 1st port of call and this in part influenced the increase in arrivals to that island because they did not do that in February 2017.

In February 2018, Carnival Cruises brought in 51% more cruise passengers into Grand Bahama as a 1st port of call than in February 2017 and this significantly influenced the increase in arrivals to that island.

In February 2018, Carnival Cruises made 4 more calls on Half Moon Cay as a 1st port of call than they had in February 2017.

In February 2018, the M/V San Gw ann made 9 more calls on Bimini as a 1st port of call compared to February 2017 and this significantly increased the arrivals to that island.

Although overall foreign air and sea arrivals to the Bahamas were down by -0.1% in February 2018 compared to February 2017 because of the decline in cruise arrivals, many of the Islands of the Bahamas experienced increases:

▪ **Foreign arrivals were up in:**



- Grand Bahama (up 13.4%)

Foreign arrivals overall were up 13.4% but air arrivals to Grand Bahama were down. The increase in overall foreign arrivals to Grand Bahama, were impacted by a significant increase in cruise arrivals brought into the island by Carnival Cruises during the month but air arrivals to the island continued to be down as a result of the closure of the Memories Resort, although there was a slowing in the rate of the decline;

- Foreign arrivals to the Out Islands continued to perform well in February 2018 and were up by 12.8% during the month. Foreign Arrivals were up in most of the major Out Islands during the month;
- Abaco (up 2.6%);
- Andros (up 16.7%);
- Bimini (up 54.7%)

Foreign arrivals to Bimini were up 54.7% in part because the San Gwann, a cruise ship made more calls on the island in February 2018 than they had in February 2017. In addition, air arrivals increased by 11.1% during the month and this significantly increased the overall arrivals to the destination;

- Cat Cay (up 16.2%);
- Eleuthera (up 113.4%)

Foreign arrivals to Eleuthera were up 113.4% in part because Carnival Cruises and Princess Cruises both significantly increased the number of calls and cruise arrivals to Princess Cay, Eleuthera in February 2018 (as a 1st port of call). In addition, air arrivals to Eleuthera significantly increased by 32.2% in February 2018 compared to February 2017;

- Exuma (up 2.3%);
- Half Moon Cay (up 20.4%) is a cruise port only;
- Inagua (up 787%)

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;

- San Salvador (up 12.9%).

▪ **Foreign arrivals were down in:**



- Nassau/Paradise Island (arrivals down by -10.7% overall but air arrivals by themselves to the island were up by 18.9%). The decline in foreign arrivals to Nassau/Paradise Island, were influenced by the reduction in cruise calls to the island by several cruise lines during the month of February 2018. The following major cruise lines reduced the number of calls that they made on the island in February 2018 compared to February 2017: Disney Cruises, Royal Caribbean Int'l, Norwegian Cruises, and MSC Cruises. This reduction in cruise calls meant that less cruise visitors were brought into the island on these cruise lines during the month;
- Berry Islands (down by -13.2%);

- Cat Island (down by -28.7%);
- Long Island (down by -25.7%).

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: 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 February 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%
YTD	57.7%	64.3%	\$243.88	\$ 220.64	\$ 140.81	\$ 141.94	35%	14%	22%

Source: Large Hotel properties Nassau/Paradise Island and Bahamas Ministry of Tourism Research & Statistics Dept.,

Two of the Baha Mar properties the Grand Hyatt and the SLS opened in 2018. The data in the table above includes Baha Mar and Atlantis properties.

Room Revenue

- In January 2018, room revenue increased by 35% compared to January 2017 and rooms sold increased by 17%;
- In February 2018, room revenue increased by 34% compared to February 2017 and rooms sold increased by 26%.

APPENDIX

CRUISE ARRIVALS TO THE BAHAMAS 1ST PORT OF ENTRY ONLY 2018 and 2017

	January to February YTD		
	2018	2017	% CHG
January	426,260	407,272	4.7%
February	395,926	416,320	-4.9%
Total YTD	822,186	823,592	-0.2%

Source: Dept. of Immigration, Port Authority, Customs and Bahamas Ministry of Tourism Research & Statistics Dept.,

Poor weather conditions on the sea in February 2018 impacted the cruise arrivals into the destination during that month.

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

	February		
	2018	2017	%CHG 18/17
Nassau/Paradise Island	177,018	224,560	-21.2%
Grand Bahama	49,159	41,794	17.6%
Abaco (Castaway Cay)	30,074	30,524	-1.5%
Andros	-	-	0.0%
Berry Islands	56,027	65,093	-13.9%
Bimini	1,445	208	594.7%
Cat Cay	-	-	0.0%
Cat Island	-	-	0.0%
Eleuthera (Princess Cay & Oth)	33,972	14,362	136.5%
Exuma	-	-	0.0%
Half Moon Cay	47,902	39,779	20.4%
Inagua	329	-	100.0%
Long Island	-	-	0.0%
San Salvador	-	-	0.0%
Bahamas Overall	395,926	416,320	-4.9%

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.

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:

Georgina Delancy
Director
Research & Statistics Dept.



The Bahamas Ministry of Tourism
Reginald Court, George Street
P.O. Box N-3701 Nassau, Bahamas
Phone: 242-302-2094 Fax: 242-328-7991
www.tourismtoday.com www.bahamas.com