

JANUARY 2019 VS 2018

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

	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%

Source: Immigration, Customs various ports of entry in the Bahamas, and Port Authorities. Research and Statistics Dept. Ministry of Tourism

- Foreign air and sea arrivals to the Bahamas were up by 19.3% in January 2019 compared to January 2018.
- Foreign air arrivals by themselves were up by 28.8% in January 2019 compared to January 2018.

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

	2019	2018	2019/2018	2019	2018	2019/2018
	Air and Sea			Air Only		
			% Chg Air/Sea			% Chg Air
Nassau/Paradise Island	402,702	309,845	30.0%	101,558	76,418	32.9%
Grand Bahama	48,834	73,282	-33.4%	5,782	5,046	14.6%
Abaco	39,730	29,269	35.7%	7,089	5,938	19.4%
Andros	616	738	-16.5%	603	731	-17.5%
Berry Islands	41,595	32,327	28.7%	612	553	10.7%
Bimini	4,301	4,214	2.1%	965	1,823	-47.1%
Cat Cay	573	283	102.5%	265	169	56.8%
Cat Island	68	60	13.3%	61	60	1.7%
Eleuthera	38,887	33,515	16.0%	4,850	3,548	36.7%
Exuma	6,147	4,877	26.0%	6,075	4,785	27.0%
Half Moon Cay	51,268	43,419	18.1%	-	-	0.0%
Inagua	87	106	-17.9%	33	8	312.5%
Long Island	91	94	-3.2%	85	94	-9.6%
San Salvador	1,982	1,703	16.4%	1,934	1,703	13.6%
Bahamas Overall	636,881	533,732	19.3%	129,912	100,876	28.8%

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 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 significantly during the month. The ferry/cruise ship service into Bimini brought in both cruise visitors and sea landed arrivals (stopovers). In January 2019, more sea landed arrivals came into Bimini than cruise arrivals. Sea Landed arrivals are not listed above but made up the bulk of the arrivals into Bimini during the month.

Foreign air and sea arrivals were up in January 2019 compared to the same period of 2018. Foreign arrivals (1st port of entry) were up in the following islands: Nassau/Paradise Island, Abaco, Berry Islands, Bimini, Cat Cay, Cat Island, Eleuthera, Exuma, Half Moon Cay (cruise port only), and San Salvador during the month.

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

ISLANDS UP

- Foreign Arrivals to Nassau/Paradise Island were up 30% in January 2019, and air arrivals by themselves to the island were up by 32.9%. Air arrivals to Nassau/P.I. were up in every month of 2018 compared to 2017 and this trend continued into January 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;
- Out Islands up 23.1%, foreign arrivals were up for most of the islands:
 - Abaco up 35.7%;
 - Berry Islands up 28.7%;
 - Bimini up 2.1%;
 - Cat Island arrivals up 13.3%;
 - Cat Cay arrivals up 102.5%;
 - Half Moon Cay (cruise port only) up 18.1%;
 - Eleuthera up 16%

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 36.7%. In addition, Carnival Cruises increased their calls on Princess Cay (Eleuthera) in January 2019;
 - Exuma up 26.0%;
 - San Salvador up 16.4%;
 - Exuma up 26.0%;
 - San Salvador up 16.4%.

ISLANDS DOWN

- Foreign arrivals to Grand Bahama were down by 33.4%, but air arrivals by themselves were up significantly by 14.6% by the end of January 2019. Air arrivals to Grand Bahama have been trending up since May 2018 despite the fact that 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.
 - Overall arrivals to the island were dragged down by the decline in calls (1st port of entry) made by major cruise lines that brought in fewer visitors than in the previous period: Carnival Cruises (a decline of 34.1%), Norwegian Cruises (-19.2%) and Royal Caribbean Int'l (-79.2%). The number of cruise calls (1st port of entry) made on Grand Bahama did increase by 15.4% in January 2019, however, these calls were made by much smaller ships operated by Bahamas Paradise Cruise lines, and the Balearia. The increase in calls made by the smaller ships/ferry were not enough to balance off the decline in the calls made by the larger ships;
- Andros down 16.5%;
- Inagua down 17.9%;
- Long Island down 3.2%.

Air Arrivals January 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 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. Visitor arrivals into the Bahamas were significantly impacted by the storm.

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 in full operation yet. 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 properties, the Atlantis properties as a group and the All-Inclusive properties as a group, increased the amount of room nights sold in 2018 and this trend continued into January 2019.

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

In January 2019, air arrivals to Nassau/Paradise Island were up by 32.9% compared to January 2018. The air arrivals to Nassau/Paradise Island were now moving full speed ahead.

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 January 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%

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 2019. The room nights sold for the large hotels as a whole also increased in every month of 2018 and into January 2019;
- In January 2019, room revenue increased by 48% compared to January 2018 and room nights sold increased by 36%.

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

	January		
	2019	2018	% CHG
January	498,913	426,260	17.0%

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. Cruise arrivals were up by 17% in January 2019 compared to January 2018.
- Cruise arrivals (1st port of entry) were up in Nassau/Paradise Island (+29.1%), Abaco (+40.6%), Berry Islands (+28.7%), Eleuthera (+13.7%), and Half Moon Cay (+18.1%).
- Cruise arrivals to Bimini were down by 13.9% but the amount of sea landed visitors/sea stopovers to the island increased significantly by 79.7%. This significant increase in sea landed visitors was significant enough to balance out the decline in air and cruise arrivals to the island of Bimini.

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

	JANUARY 2019 ONLY		
	2019	2018	%CHG 19/18
Nassau/Paradise Island	300,274	232,575	29.1%
Grand Bahama	39,546	64,779	-39.0%
Abaco (Castaway Cay)	32,261	22,951	40.6%
Andros	-	-	0.0%
Berry Islands	40,685	31,613	28.7%
Bimini	883	1,026	-13.9%
Cat Cay	-	-	0.0%
Cat Island	-	-	0.0%
Eleuthera (Princess Cay & Oth)	33,996	29,897	13.7%
Exuma	-	-	0.0%
Half Moon Cay	51,268	43,419	18.1%
Inagua	-	-	0.0%
Long Island	-	-	0.0%
San Salvador	-	-	0.0%
Bahamas Overall	498,913	426,260	17.0%

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.

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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