

FOREIGN ARRIVALS SUMMARY REPORT



Full Year 2018
Bahamas Ministry of Tourism
Research and Statistics Department

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JANUARY TO DECEMBER 2018 VS 2017

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

| | 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% |
| May | 499,958 | 469,044 | 6.6% | 136,092 | 114,422 | 18.9% |
| June | 539,756 | 492,368 | 9.6% | 154,903 | 133,855 | 15.7% |
| July | 602,530 | 544,203 | 10.7% | 163,406 | 144,634 | 13.0% |
| August | 516,029 | 476,983 | 8.2% | 129,568 | 110,072 | 17.7% |
| September | 400,527 | 246,568 | 62.4% | 63,453 | 42,672 | 48.7% |
| October | 452,862 | 431,474 | 5.0% | 84,680 | 68,923 | 22.9% |
| November | 576,789 | 556,641 | 3.6% | 120,103 | 100,811 | 19.1% |
| December | 670,408 | 609,601 | 10.0% | 150,531 | 133,600 | 12.7% |
| Grand Total | 6,622,015 | 6,135,839 | 7.9% | 1,558,086 | 1,335,613 | 16.7% |

Source: Immigration, Customs various ports of entry in the Bahamas, and Port Authorities. Research and Statistics Dept. Ministry of Tourism
The Easter Holiday fell in the month of March 2018 instead of in April. All numbers are subject to revision

- Foreign air and sea arrivals to the Bahamas were up by 7.9% between the months of January to December 2018 compared to the same period of 2017.
- Foreign air arrivals by themselves were up by 16.7% between the months of January to December 2018 compared to the same period of 2017.

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

| | 2018 | 2017 | 2018/2017 | 2018 | 2017 | 2018/2017 |
|------------------------|------------------|------------------|---------------|------------------|------------------|--------------|
| | Air and Sea | | | Air Only | | |
| | | | % Chg Air/Sea | | | % Chg Air |
| Nassau/Paradise Island | 3,777,664 | 3,629,891 | 4.1% | 1,168,342 | 979,843 | 19.2% |
| Grand Bahama | 670,745 | 614,570 | 9.1% | 74,479 | 70,692 | 5.4% |
| Abaco | 437,825 | 426,543 | 2.6% | 119,352 | 103,598 | 15.2% |
| Andros | 11,583 | 11,003 | 5.3% | 11,396 | 10,727 | 6.2% |
| Berry Islands | 672,782 | 571,867 | 17.6% | 8,827 | 7,509 | 17.6% |
| Bimini | 116,827 | 107,258 | 8.9% | 27,305 | 30,403 | -10.2% |
| Cat Cay | 12,606 | 12,743 | -1.1% | 4,637 | 4,795 | -3.3% |
| Cat Island | 1,084 | 1,050 | 3.2% | 1,067 | 998 | 6.9% |
| Eleuthera | 414,029 | 221,892 | 86.6% | 61,786 | 48,746 | 26.8% |
| Exuma | 62,885 | 61,906 | 1.6% | 62,123 | 60,956 | 1.9% |
| Half Moon Cay | 423,762 | 458,677 | -7.6% | - | - | 0.0% |
| Inagua | 1,341 | 1,001 | 34.0% | 247 | 114 | 116.7% |
| Long Island | 1,545 | 1,322 | 16.9% | 1,383 | 1,263 | 9.5% |
| San Salvador | 17,337 | 16,116 | 7.6% | 17,142 | 15,969 | 7.3% |
| Bahamas Overall | 6,622,015 | 6,135,839 | 7.9% | 1,558,086 | 1,335,613 | 16.7% |

All numbers are subject to revision. Carnival Cruise Lines significantly increased the cruise visitors to Princess Cay, Eleuthera during most of 2018. In September 2017 the region was plagued with three hurricanes (Hurricane Irma, Hurricane Maria and Hurricane Jose) that caused major devastation and caused the cancellation and re-routing of many ships away from the Bahamas during the month. Source: Immigration and Customs various ports of entry in the Bahamas, & Research and Statistics Dept. Ministry of Tourism

Foreign air and sea arrivals were up in every month of 2018 except the month of February which was plagued by poor weather. Cruise arrivals to the Bahamas (1st port of entry) which form a part of the sea arrivals were up in every month during the year except February and March 2018 because of poor weather, that caused rough seas that negatively impacted ocean travel to the destination during these two months.

Most of the Islands of the Bahamas experienced increases in foreign arrivals by the end of December 2018:

ISLANDS UP

- Foreign Arrivals to Nassau/Paradise Island were up 4.1% by the end of December 2018, and air arrivals by themselves to the island were up by 19.2%. Air arrivals to Nassau/P.I. were up in every month of 2018 compared to 2017. 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;
- Foreign arrivals to Grand Bahama were up by 9.1%, & air arrivals by themselves were up by 5.4% by the end of December 2018. Air arrivals to the island were up in the months of March (the month of the Easter Holiday), May, June, July, August, September, October, November and December 2018. After Hurricane Matthew in October 2016, air arrivals to Grand Bahama were significantly impacted by the closure of the Memories Resort because the number of room nights available for sale & the number of rooms in inventory had significantly declined;

ISLANDS UP CONT'D

- Out Islands up 14.9%, foreign arrivals were up for most of these islands:
 - Abaco up 2.6%;
 - Andros up 5.3%;
 - Berry Islands up 17.6%;
 - Bimini up 8.9%;
 - Cat Island arrivals up 3.2%;
 - Eleuthera up 86.6%

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. In addition, Carnival Cruises and Princess Cruises significantly increased their calls on Princess Cay (Eleuthera) in 2018;
- Exuma up 1.6%;
- Inagua up 34.0%

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 impacted the increase in arrivals during the 1st months of the year;

- Long Island up 16.9%;
- San Salvador up 7.6%.

ISLANDS DOWN

- Cat Cay arrivals down 1.1%;
- Half Moon Cay (cruise port only) down 7.6%;

FOREIGN AIR AND SEA ARRIVALS

DECEMBER 2018 VS 2017

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

| | 2018 | 2017 | 2018/2017 | 2018 | 2017 | 2018/2017 |
|------------------------|----------------|----------------|---------------|----------------|----------------|--------------|
| | Air and Sea | | | Air Only | | |
| | | | % Chg Air/Sea | | | % Chg Air |
| Nassau/Paradise Island | 421,099 | 323,451 | 30.2% | 113,699 | 98,375 | 15.6% |
| Grand Bahama | 52,044 | 43,073 | 20.8% | 8,235 | 6,504 | 26.6% |
| Abaco | 39,025 | 56,239 | -30.6% | 10,061 | 10,629 | -5.3% |
| Andros | 917 | 1,104 | -16.9% | 904 | 1,083 | -16.5% |
| Berry Islands | 38,336 | 68,759 | -44.2% | 866 | 816 | 6.1% |
| Bimini | 7,222 | 8,266 | -12.6% | 1,757 | 2,537 | -30.7% |
| Cat Cay | 969 | 1,047 | -7.4% | 593 | 621 | -4.5% |
| Cat Island | 118 | 106 | 11.3% | 118 | 106 | 11.3% |
| Eleuthera | 61,088 | 42,464 | 43.9% | 6,591 | 5,778 | 14.1% |
| Exuma | 6,022 | 5,352 | 12.5% | 5,918 | 5,304 | 11.6% |
| Half Moon Cay | 41,674 | 57,848 | -28.0% | - | - | 0.0% |
| Inagua | 89 | 63 | 41.3% | 33 | 18 | 83.3% |
| Long Island | 200 | 161 | 24.2% | 180 | 161 | 11.8% |
| San Salvador | 1,605 | 1,668 | -3.8% | 1,576 | 1,668 | -5.5% |
| Bahamas Overall | 670,408 | 609,601 | 10.0% | 150,531 | 133,600 | 12.7% |

All numbers are subject to revision.

Cruise arrivals to a few of the Out Islands slipped in the month of December 2018 as many of the cruise lines sent their ships to the port of Nassau instead during the month.

Carnival Cruise Lines significantly increased the cruise visitors to Princess Cay, Eleuthera during the 1st 10 months of 2018.

In September 2017 the region was plagued with three hurricanes (Hurricane Irma, Hurricane Maria and Hurricane Jose)

that caused major devastation and caused the cancellation and re-routing of many ships away from the Bahamas 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 10.0% during the month of December 2018 compared to December 2017 and air arrivals by themselves were up by 12.7%.
- In September 2017, hurricanes Irma, Maria, and Jose passed through the Caribbean and the Southern Bahamas and were responsible for dragging down the arrivals during that month and in that year. There were no hurricanes in the Bahamas in 2018.

ISLANDS UP DECEMBER

- Foreign arrivals (1st port of entry) to Nassau/Paradise Island were up by 30.2% during the month of December 2018 compared to 2017. Arrivals to Nassau/Paradise Island increased significantly during the month of December because both air and sea arrivals to the island performed well. Air arrivals by themselves were up by 15.6% and sea arrivals were up by 36.6%. The significant increase in the sea arrivals to Nassau/P.I. (1st port of entry) was due to the fact that some of the cruise lines made more calls on this island than they did on their private islands during the month. Both Norwegian Cruise Lines and Royal Caribbean increased their calls on Nassau/P.I. (1st port of entry) while they reduced calls on the Berry Islands during the month.
- Cat Island up 11.3%;
- Exuma up 12.5%;
- Eleuthera arrivals up 43.9% during the month. Air arrivals by themselves however were up 14.1% because there was an increase in airlift into North Eleuthera from the US in 2018;
- Grand Bahama arrivals up 20.8% and air arrivals by themselves were up by 26.6%;
- Inagua up 41.3%;
- Long Island up 24.2%.

ISLANDS DOWN DECEMBER

- Abaco down 30.6%; Arrivals into Abaco declined significantly during the month because Disney Cruise lines reduced the number of calls (1st port of entry) on the island from 14 in December 2017 to 9 in December 2018;
- Andros down 16.9%;
- Berry Islands down 44.2%; arrivals to the Berry Islands declined significantly during the month of December 2018 because both Norwegian Cruises and Royal Caribbean Int'l reduced the number of calls into the islands. Royal Caribbean brought in smaller ships and reduced the number of calls into Coco Cay, Berry Islands by two calls during December 2018 compared to 2017, and Norwegian Cruise Lines reduced the number of calls to Great Stirrup Cay, Berry Islands by seven. Air arrivals by themselves to the Berry Islands however were up 6.1%;
- Bimini foreign arrivals (1st port of entry) were down by 12.6% in December 2018 compared to December 2017.
- Cat Cay down 7.4%;
- Half Moon Cay (cruise port only) down 28.0%;
- San Salvador down 3.8%.

STOPOVER VISITORS (REVISED)

**STOPOVER VISITORS
BY COUNTRY & BY MONTH
ISLANDS OF THE BAHAMAS
PRELIMINARY REVISED
2018**

| Month | USA | | | Canada | | | Europe | | | Caribbean | | | Latin America | | | ROW | | |
|--------------|------------------|------------------|--------------|----------------|----------------|--------------|----------------|----------------|-------------|---------------|---------------|-------------|---------------|---------------|--------------|---------------|---------------|-------------|
| | 2018 | 2017 | % Chg | 2018 | 2017 | % Chg | 2018 | 2017 | % Chg | 2018 | 2017 | % Chg | 2018 | 2017 | % Chg | 2018 | 2017 | % Chg |
| Jan | 73,268 | 67,961 | 7.8% | 13,307 | 12,481 | 6.6% | 10,985 | 9,527 | 15.3% | 1,287 | 1,641 | -21.6% | 4,387 | 3,661 | 19.8% | 2,344 | 1,723 | 36.0% |
| Feb | 98,540 | 86,178 | 14.3% | 15,583 | 14,272 | 9.2% | 12,662 | 9,543 | 32.7% | 1,624 | 1,583 | 2.6% | 4,055 | 2,842 | 42.7% | 3,005 | 1,504 | 99.8% |
| Mar | 149,695 | 125,855 | 18.9% | 17,328 | 16,260 | 6.6% | 12,694 | 10,313 | 23.1% | 2,519 | 1,113 | 126.3% | 3,280 | 1,927 | 70.2% | 2,488 | 1,727 | 44.1% |
| Apr | 116,760 | 118,230 | -1.2% | 12,869 | 11,566 | 11.3% | 13,869 | 14,013 | -1.0% | 1,762 | 1,939 | -9.1% | 2,929 | 3,468 | -15.5% | 2,468 | 2,236 | 10.4% |
| May | 117,276 | 110,134 | 6.5% | 9,289 | 8,174 | 13.6% | 9,564 | 8,418 | 13.6% | 2,081 | 1,826 | 14.0% | 3,015 | 2,568 | 17.4% | 2,490 | 1,964 | 26.8% |
| Jun | 142,135 | 136,757 | 3.9% | 6,020 | 4,057 | 48.4% | 6,573 | 7,268 | -9.6% | 2,280 | 1,834 | 24.3% | 3,066 | 2,731 | 12.3% | 1,836 | 2,127 | -13.7% |
| Jul | 147,309 | 140,176 | 5.1% | 6,774 | 7,301 | -7.2% | 9,677 | 10,936 | -11.5% | 2,040 | 2,350 | -13.2% | 3,857 | 5,433 | -29.0% | 1,838 | 2,927 | -37.2% |
| Aug | 120,790 | 95,942 | 25.9% | 7,622 | 6,789 | 12.3% | 12,306 | 12,986 | -5.2% | 1,688 | 1,622 | 4.1% | 1,779 | 2,134 | -16.6% | 1,600 | 1,981 | -19.2% |
| Sep | 55,818 | 34,891 | 60.0% | 4,685 | 2,413 | 94.2% | 4,327 | 3,909 | 10.7% | 1,506 | 851 | 77.0% | 1,405 | 1,039 | 35.2% | 1,232 | 1,296 | -4.9% |
| Oct | 63,732 | 48,787 | 30.6% | 7,057 | 4,845 | 45.7% | 7,507 | 8,220 | -8.7% | 1,577 | 1,286 | 22.6% | 1,905 | 1,806 | 5.5% | 1,519 | 1,975 | -23.1% |
| Nov | 93,579 | 73,062 | 28.1% | 10,969 | 9,488 | 15.6% | 10,261 | 8,780 | 16.9% | 1,361 | 1,564 | -13.0% | 1,776 | 3,692 | -51.9% | 1,704 | 1,628 | 4.7% |
| Dec | 125,734 | 100,417 | 25.2% | 15,342 | 13,433 | 14.2% | 11,774 | 11,007 | 7.0% | 1,571 | 1,895 | -17.1% | 2,614 | 3,387 | -22.8% | 2,043 | 2,258 | -9.5% |
| Total | 1,304,636 | 1,138,390 | 14.6% | 126,845 | 111,079 | 14.2% | 122,199 | 114,920 | 6.3% | 21,296 | 19,504 | 9.2% | 34,068 | 34,688 | -1.8% | 24,567 | 23,346 | 5.2% |

All numbers are subject to revision as Immigration cards come in. Stopover Visitors in this table are based on place of stay and not port of entry.

All numbers in yellow are preliminary and subject to change.

- Stopover visitors (visitors that stay 24 hours or more in the destination and can come by air or sea) from the United States were up by 14.6% between January to December 2018 compared to the same period of 2017.
- Stopover visitors from Canada were up by 14.2% in 2018 compared to 2017.
- Stopover visitors from Europe were up by 6.3% in 2018 compared to 2017.
- Stopover visitors from the Caribbean were up by 9.2% in 2018 compared to 2017.
- Stopover visitors from Latin America were down by 1.8% in 2018 compared to 2017.
- Stopover visitors from the Rest of the World were up by 5.2% in 2018 compared to 2017.

STOPOVER VISITORS (REVISED)
STOPOVER VISITORS
TOP 10 US STATES AND CANADIAN PROVINCES
THE ISLANDS OF THE BAHAMAS
2018 VS 2017

| US STATES | Full Year | | | CANADA PROVINCES | Full Year | | |
|---------------|------------------|------------------|--------------|---------------------------|----------------|----------------|--------------|
| | 2018 | 2017 | % Chg | | 2018 | 2017 | % Chg |
| Florida | 286,340 | 276,196 | 3.7% | Ontario | 80,643 | 67,902 | 18.8% |
| New York | 133,748 | 114,689 | 16.6% | Quebec | 18,353 | 17,897 | 2.5% |
| Texas | 80,708 | 62,023 | 30.1% | Alberta | 7,545 | 6,492 | 16.2% |
| California | 63,892 | 56,420 | 13.2% | British Columbia | 7,445 | 6,302 | 18.1% |
| New Jersey | 62,113 | 54,314 | 14.4% | Nova Scotia | 1,777 | 1,704 | 4.3% |
| Pennsylvania | 49,081 | 41,837 | 17.3% | Manitoba | 1,490 | 2,320 | -35.8% |
| Georgia | 47,483 | 39,703 | 19.6% | Saskatchewan | 1,174 | 1,116 | 5.2% |
| Massachusetts | 41,940 | 36,081 | 16.2% | New Brunswick | 900 | 919 | -2.1% |
| Virginia | 36,721 | 31,878 | 15.2% | Newfoundland and Labrador | 501 | 498 | 0.6% |
| Illinois | 34,885 | 29,637 | 17.7% | Prince Edward Island | 217 | 172 | 26.2% |
| Other | 467,725 | 395,612 | 18.2% | Other | 6,800 | 5,757 | 18.1% |
| TOTAL | 1,304,636 | 1,138,390 | 14.6% | TOTAL | 126,845 | 111,079 | 14.2% |

Source: Dept. of Immigration and The Research and Statistics Dept, The Bahamas Ministry of Tourism. All numbers subject to revision

- The **top US states** for stopover business to the Bahamas were: Florida which had 21.9% of the market share of stopover visitors from the United States, New York with 10.3% of the mkt shr., and Texas with 6.2% of the mkt. shr. Other popular states included California, New Jersey, Pennsylvania, Georgia, Massachusetts, Virginia and Illinois.
- In 2018, stopover visitors from Florida increased by 3.7% compared to 2017, and from New York they increased by 16.6%.
- Stopovers increased by 30.1% from Texas, 13.2% from California, 14.4% from New Jersey, 17.3% from Pennsylvania, 19.6% from Georgia, 16.2% from Massachusetts, 15.2% from Virginia, and 17.7% from Illinois.
- The **top Canadian Provinces** for stopover business to the Bahamas were: Ontario which had 63.6% of the market share of stopovers from Canada, Quebec with 14.5% of the mkt shr., Alberta with 6.0% of the mkt. shr., and British Columbia with 5.9% of the mkt. shr. Other popular Canadian provinces included: Nova Scotia, Manitoba, and Saskatchewan.
- Stopovers increased by 18.8% from Ontario, 2.5% from Quebec, 16.2% from Alberta, 18.1% from British Columbia, and 4.3% from Nova Scotia.

STOPOVER VISITORS (REVISED)
TOP 10 EUROPEAN COUNTRIES AND TOP 10 LATIN AMERICAN COUNTRIES

STOPOVER VISITORS
EUROPEAN COUNTRIES AND LATIN AMERICA
THE ISLANDS OF THE BAHAMAS
2018 VS 2017

| EUROPEAN COUNTRIES | Full Year | | | LATIN AMERICA | Full Year | | |
|--------------------|----------------|----------------|-------------|---------------|---------------|---------------|--------------|
| | 2018 | 2017 | % Chg | | 2018 | 2017 | % Chg |
| UK | 36,389 | 33,582 | 8.4% | BRAZIL | 8,270 | 8,701 | -5.0% |
| FRANCE | 17,562 | 16,785 | 4.6% | ARGENTINA | 6,615 | 7,401 | -10.6% |
| ITALY | 13,576 | 13,077 | 3.8% | MEXICO | 5,560 | 5,829 | -4.6% |
| GERMANY | 13,019 | 11,943 | 9.0% | COLOMBIA | 2,551 | 2,233 | 14.2% |
| SWITZERLAND | 6,118 | 6,257 | -2.2% | CHILE | 1,964 | 1,685 | 16.6% |
| SPAIN | 4,286 | 4,332 | -1.1% | PANAMA | 1,746 | 1,506 | 15.9% |
| POLAND | 3,453 | 3,137 | 10.1% | PERU | 1,735 | 1,470 | 18.0% |
| NETHERLANDS | 2,675 | 2,909 | -8.0% | VENEZUELA | 1,273 | 1,298 | -1.9% |
| ROMANIA | 2,417 | 1,643 | 47.1% | ECUADOR | 892 | 859 | 3.8% |
| SWEDEN | 2,237 | 2,203 | 1.5% | URUGUAY | 746 | 832 | -10.3% |
| OTHER | 20,467 | 19,052 | 7.4% | OTHER | 2,716 | 2,874 | -5.5% |
| TOTAL | 122,199 | 114,920 | 6.3% | TOTAL | 34,068 | 34,688 | -1.8% |

Source: Dept. of Immigration and The Research and Statistics Dept, The Bahamas Ministry of Tourism. All numbers subject to revision

- In 2018, stopover visitors from Europe increased by 6.3% compared to 2017.
- The top European Countries for stopover business to the Bahamas in 2018 were: the UK with 29.8% of the market share, France with 14.4% of the market, Italy (11.1%), Germany (10.7%), Switzerland (5%), and Spain (3.5%).
- In 2018, stopover visitors increased by 8.4% from the UK, 4.6% from France, 3.8% from Italy, and 9.0% from Germany compared to 2017.
- In 2018, the top Latin American countries that brought stopovers into the Bahamas were Brazil (24.3% of the mkt, shr.), Argentina (19.4%), Mexico (16.3%), and Colombia (7.5%). Other popular Latin American countries for the Bahamas were Chile, Panama, Peru and Venezuela.
- The top three Latin American countries that brought stopovers to the Bahamas did not grow in 2018 compared to 2017.

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 between the months of January to December 2018 and would have attracted visitors to their properties. The Rosewood Baha Mar softly opened at the end of May 2018 and their numbers are included below.

NASSAU AND PARADISE ISLAND SELECT LARGE HOTELS PERFORMANCE PRELIMINARY STATISTICS 2018-2017 REVISED

| | 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 | 53.0% | 61.7% | \$ 242.54 | \$ 208.77 | \$ 128.64 | \$ 128.81 | 36% | 8% | 17% |
| Feb | 63.0% | 67.2% | \$ 246.75 | \$ 232.63 | \$ 155.45 | \$ 156.38 | 34% | 19% | 27% |
| Mar | 75.2% | 76.5% | \$ 317.64 | \$ 287.73 | \$ 239.00 | \$ 220.17 | 45% | 28% | 32% |
| Apr | 72.6% | 75.6% | \$ 265.35 | \$ 282.84 | \$ 192.77 | \$ 213.71 | 21% | 9% | 29% |
| May | 63.5% | 58.7% | \$ 223.26 | \$ 212.53 | \$ 141.79 | \$ 124.69 | 36% | 22% | 30% |
| Jun | 68.1% | 65.3% | \$ 233.22 | \$ 237.76 | \$ 158.76 | \$ 155.16 | 22% | 16% | 24% |
| Jul | 73.0% | 73.5% | \$ 251.48 | \$ 251.59 | \$ 183.66 | \$ 185.01 | 22% | 14% | 22% |
| Aug | 65.3% | 65.2% | \$ 217.27 | \$ 223.54 | \$ 141.90 | \$ 145.72 | 25% | 21% | 28% |
| Sep | 37.5% | 31.8% | \$ 166.37 | \$ 156.09 | \$ 62.35 | \$ 49.63 | 61% | 54% | 51% |
| Oct | 45.2% | 45.0% | \$ 179.81 | \$ 174.05 | \$ 81.29 | \$ 78.38 | 34% | 27% | 30% |
| Nov | 62.2% | 57.1% | \$ 226.04 | \$ 216.29 | \$ 140.52 | \$ 123.50 | 40% | 22% | 34% |
| Dec | 62.1% | 54.4% | \$ 366.92 | \$ 303.14 | \$ 227.88 | \$ 165.05 | 46% | 16% | 21% |
| YTD | 61.7% | 60.7% | \$ 250.57 | \$ 239.26 | \$ 154.60 | \$ 145.34 | 34% | 19% | 28% |

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. 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. The Ocean Club 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. The Grand Hyatt was not in full operation in May 2017 but it was in full operation in May and June 2018. 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 of 2018 compared to the same period of 2017. The room nights sold for the large hotels as a whole also increased in every month of 2018;
- In January 2018, room revenue increased by 36% 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 27%;

- 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 21% compared to April 2017 and room nights sold increased by 29%;
- In May 2018, room revenue increased by 36% compared to May 2017 and room nights sold increased by 30%;
- In June 2018, room revenue increased by 22% compared to June 2017 and room nights sold increased by 24%;
- In July 2018, room revenue increased by 22% compared to July 2017 and room nights sold increased by 22%;
- In August 2018, room revenue increased by 25% compared to August 2017 and room nights sold increased by 28%;
- In September 2018, room revenue increased by 61% compared to September 2017 and room nights sold increased by 51%;
- In October 2018, room revenue increased by 34% compared to December 2017 and room nights sold increased by 30%;
- In November 2018, room revenue increased by 40% compared to December 2017 and room nights sold increased by 34%;
- In December 2018, room revenue increased by 46% compared to December 2017 and room nights sold increased by 21%;
- In January to December 2018 YTD, room revenue increased by 34% compared to the same period of 2017 and room nights sold increased by 28%.

HOTEL PERFORMANCE GRAND BAHAMA ISLAND
GRAND BAHAMA ISLAND HOTEL PERFORMANCE
PRELIMINARY STATISTICS 2018-2017

| | Occupancy | | ADR | | RevPar | | Room Revenue | Grand Bah. Air Arrivals | Room Nights Sold |
|------------|--------------|--------------|-----------------|-----------------|-----------------|-----------------|--------------|-------------------------|------------------|
| | 2018 | 2017 | 2018 | 2017 | 2018 | 2017 | % Chg 18/17 | % Chg 18/17 | % Chg 18/17 |
| Jan | 52.5% | 48.4% | \$ 65.98 | \$ 67.29 | \$ 34.66 | \$ 32.55 | 4% | -18% | 6% |
| Feb | 60.8% | 61.2% | \$ 69.07 | \$ 70.46 | \$ 42.01 | \$ 43.13 | -2% | -7% | 0% |
| Mar | 65.9% | 62.2% | \$ 74.20 | \$ 76.62 | \$ 48.90 | \$ 47.65 | 3% | 7% | 5% |
| Apr | 66.0% | 65.7% | \$ 83.43 | \$ 73.99 | \$ 55.09 | \$ 48.64 | 14% | -18% | 1% |
| May | 60.9% | 55.6% | \$ 72.76 | \$ 64.99 | \$ 44.30 | \$ 36.14 | 23% | 15% | 10% |
| Jun | 65.9% | 63.3% | \$ 75.05 | \$ 72.81 | \$ 49.50 | \$ 46.09 | 7% | 22% | 4% |
| Jul | 62.0% | 66.5% | \$ 65.71 | \$ 67.87 | \$ 40.73 | \$ 45.17 | -10% | 5% | -7% |
| Aug | 55.0% | 58.6% | \$ 63.44 | \$ 61.72 | \$ 34.90 | \$ 36.17 | -4% | 19% | -7% |
| Sep | 32.4% | 26.6% | \$ 56.52 | \$ 66.53 | \$ 18.29 | \$ 17.69 | -2% | 22% | 15% |
| Oct | 37.5% | 43.2% | \$ 65.90 | \$ 62.61 | \$ 24.68 | \$ 27.05 | -9% | 1% | -13% |
| Nov | 52.6% | 47.9% | \$ 62.34 | \$ 60.72 | \$ 32.80 | \$ 29.06 | 13% | 3% | 10% |
| Dec | 56.4% | 55.4% | \$ 66.28 | \$ 66.00 | \$ 37.39 | \$ 36.58 | 3% | 27% | 3% |
| YTD | 55.8% | 54.6% | \$ 69.50 | \$ 68.09 | \$ 38.76 | \$ 37.15 | 4% | 5% | 2% |

Hurricane Irma passed through the Bahamas in September 2017 but did not hit GBI directly but caused tornadoes that did affect the island.

Hurricane Matthew passed through the Islands of the Bahamas between October 5 to 8, 2016 and did cause hotel closures in Grand Bahama and other islands.

The Memories Resort came on stream in GBI in February 2014 and was open on the island until Hurricane Matthew in 2016. Hurricane Joaquin passed through the Islands of the Bahamas in October, 2015. In 2018, Easter (Good Friday) began in March and ended in the beginning of April but in 2017 the whole holiday fell in April. Source: Hotels Grand Bahama and Research and Statistics Dept. Bahamas Ministry of Tourism

- Room revenue did not increase between the months of July and October 2018 for Grand Bahama, because there was a decline in the combined ADR for these four months compared to the same period of 2017 and in some of these months room nights sold also declined.
- However, room revenue for the hotels in Grand Bahama increased by 4% by the end of December YTD 2018, and room nights sold increased by 2%.

REASONS FOR GROWTH IN STOPOVER VISITORS TO THE BAHAMAS

The significant growth in foreign arrivals especially stopover visitors (visitors that stay 24 hours or more in the destination) to the Bahamas can in part be attributed to:

- The creative marketing efforts of:
 - The Bahamas Ministry of Tourism with the Digital Media Marketing and Social Media programs on Bahamas.com, Tourismtoday.com, Facebook, Instagram, Pinterest, YouTube, Twitter, etc.) and other marketing efforts,
 - Industry Partners: The Nassau Paradise Island Promotion Board, the Bahamas Out Island Promotion Board, the Bahamas Hotel and Tourism Association (BHTA) and the hotels themselves who have extensively marketed their properties through a host of marketing channels, for example: television commercials, etc;
- The addition of new hotel properties in 2017 and 2018 that added new room inventory to Nassau/Paradise Island: The Baha Mar properties: Grand Hyatt, SLS and Rosewood, The Courtyard Marriott, the Holiday Inn Express, etc.;
- The continued steady performance of the Atlantis properties and other Paradise Island EP Hotels in Nassau/P.I.;
- The steady performance of the all-inclusive properties in Nassau/P.I.;
- A strong US economy, the US is the biggest supplier of visitor arrivals to the Bahamas;
- The increased direct airlift to some of our major islands;
- \$300 Fuel Credit promotions to the Boating/yachting visitors;
- \$250 air credit for visitors from the US and Canada offered online to those traveling to the Out Islands;
- Two Fly free from Nassau promotion for US and Canadian residents traveling to the Out Islands;
- Two Fly free from Nassau promotion for European residents traveling on to the Out Islands;
- \$150 fee credit for private pilots that are island hopping, and other like promotions.

APPENDIX

**CRUISE ARRIVALS TO THE BAHAMAS
1ST PORT OF ENTRY ONLY
JANUARY TO DECEMBER 2018 AND 2017**

| | January to December 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% |
| May | 348,392 | 334,674 | 4.1% |
| June | 353,931 | 333,287 | 6.2% |
| July | 408,556 | 370,885 | 10.2% |
| August | 366,629 | 348,785 | 5.1% |
| September | 329,388 | 198,374 | 66.0% |
| October | 361,207 | 358,323 | 0.8% |
| November | 447,145 | 446,672 | 0.1% |
| December | 507,681 | 463,850 | 9.4% |
| Total YTD | 4,877,596 | 4,626,259 | 5.4% |

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 during the first quarter.
- During the months of January to December 2018 cruise arrivals (1st port of entry) to the Bahamas Overall were up in every month of 2018 except February and March.
- By the end of December YTD 2018, cruise arrivals (1st port of entry) to the Bahamas were up in Berry Islands, Bimini, Eleuthera, Grand Bahama, and Inagua (this island does not normally receive cruise arrivals).

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

| | JANUARY TO DECEMBER 2018 | | |
|--------------------------------|--------------------------|------------------|-------------|
| | 2018 | 2017 | %CHG 18/17 |
| Nassau/Paradise Island | 2,596,687 | 2,637,243 | -1.5% |
| Grand Bahama | 514,112 | 467,289 | 10.0% |
| Abaco (Castaway Cay) | 306,860 | 311,718 | -1.6% |
| Andros | - | - | 0.0% |
| Berry Islands | 659,203 | 561,409 | 17.4% |
| Bimini | 25,484 | 18,510 | 37.7% |
| Cat Cay | - | - | 0.0% |
| Cat Island | - | - | 0.0% |
| Eleuthera (Princess Cay & Oth) | 351,159 | 171,406 | 104.9% |
| Exuma | - | - | 0.0% |
| Half Moon Cay | 423,762 | 458,677 | -7.6% |
| Inagua | 329 | - | 100.0% |
| Long Island | - | - | 0.0% |
| San Salvador | - | - | 0.0% |
| Bahamas Overall | 4,877,596 | 4,626,252 | 5.4% |

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 May 2017.
All numbers are subject to revision.

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

| | DECEMBER 2018 ONLY | | |
|--------------------------------|--------------------|----------------|-------------|
| | 2018 | 2017 | %CHG 18/17 |
| Nassau/Paradise Island | 305,459 | 223,233 | 36.8% |
| Grand Bahama | 39,261 | 32,477 | 20.9% |
| Abaco (Castaway Cay) | 28,065 | 44,698 | -37.2% |
| Andros | - | - | 0.0% |
| Berry Islands | 37,050 | 67,495 | -45.1% |
| Bimini | 1,824 | 1,598 | 14.1% |
| Cat Cay | - | - | 0.0% |
| Cat Island | - | - | 0.0% |
| Eleuthera (Princess Cay & Oth) | 54,348 | 36,494 | 48.9% |
| Exuma | - | - | 0.0% |
| Half Moon Cay | 41,674 | 57,848 | -28.0% |
| Inagua | - | - | 0.0% |
| Long Island | - | - | 0.0% |
| San Salvador | - | - | 0.0% |
| Bahamas Overall | 507,681 | 463,843 | 9.5% |

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.

The increase in cruise arrivals to Nassau/Paradise Island in December 2018 was not enough to counteract the previous decline in cruise arrivals to the island for the year by 1st port of entry. For this reason, cruise arrivals to Nassau/Paradise Island declined by 1st port of entry. However, when Nassau/Paradise Island is reviewed on its own without the rest of the Bahamas, and all the ports of entry (1st, 2nd, and 3rd) into the island are taken into consideration, cruise arrivals increased by 0.8%.

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