

FOREIGN AIR AND SEA ARRIVALS

YTD JUNE 2019 VS YTD JUNE 2018

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

	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%
May	589,102	499,958	17.8%	158,741	136,092	16.6%
June	641,410	539,756	18.8%	168,392	154,903	8.7%
Grand Total	3,882,425	3,402,870	14.1%	980,926	846,345	15.9%

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 14.1% between January to June 2019 YTD compared to the same period of 2018.
- Foreign air arrivals by themselves were up by 15.9% between January to June 2019 YTD compared to the same period of 2018.

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

	2019	2018	2019/2018	2019	2018	2019/2018
	Air and Sea		% Chg Air/Sea	Air Only		% Chg Air
Nassau/Paradise Island	2,292,594	1,864,879	22.9%	742,669	618,632	20.1%
Grand Bahama	336,253	384,696	-12.6%	37,729	40,329	-6.4%
Abaco	231,659	263,949	-12.2%	76,254	72,272	5.5%
Andros	5,595	6,685	-16.3%	5,512	6,565	-16.0%
Berry Islands	449,226	318,219	41.2%	6,515	4,828	34.9%
Bimini	58,303	59,558	-2.1%	12,123	15,996	-24.2%
Cat Cay	6,482	6,314	2.7%	2,652	2,259	17.4%
Cat Island	851	753	13.0%	800	736	8.7%
Eleuthera	229,879	207,918	10.6%	43,525	37,672	15.5%
Exuma	41,893	36,360	15.2%	41,225	35,754	15.3%
Half Moon Cay	216,908	241,112	-10.0%	-	-	0.0%
Inagua	815	995	-18.1%	330	43	667.4%
Long Island	1,049	967	8.5%	923	870	6.1%
San Salvador	10,918	10,465	4.3%	10,669	10,389	2.7%
Bahamas Overall	3,882,425	3,402,870	14.1%	980,926	846,345	15.9%

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 air and sea arrivals were up in January, February, March, April, May and June 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 June 2019 YTD.

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

ISLANDS UP 2019 YTD

- Foreign Arrivals to Nassau/Paradise Island were up 22.9% between January to June 2019 YTD, and air arrivals by themselves to the island were up by 20.1%. Air arrivals to Nassau/P.I. were up in every month of 2018 compared to 2017, and this trend continued into June 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 great marketing efforts done by the Bahamas Ministry of Tourism, its Industry Partners and the hotels themselves.
- Berry Islands up 41.2%;
- Cat Cay up 2.7%;
- Cat Island arrivals up 13.0%;
- Eleuthera up 10.6%
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; air arrivals grew by 15.5%;
- Exuma up 15.2%;
- Long Island up 8.5%;
- San Salvador up 4.3%.

ISLANDS DOWN 2019 YTD

- Abaco was down 12.2% primarily because Disney Cruise Lines reduced the number of calls on the island between January to June 2019 compared to 2018 as a 1st port of call. Air arrivals on their own however, were up by 5.5%;
- Andros down 16.3%;
- Bimini down 2.1%;
- Foreign arrivals to Grand Bahama were down by 12.6%, and air arrivals by themselves were also down by 6.4% between January to June 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,” and have been up and down since then.
 - Between January to June 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 20.7%), and Royal Caribbean Int’l (-7.5%). The number of cruise calls made on Grand Bahama between January to June 2019 did increase by 12.0%, 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 10.0%;
- Inagua down 18.1% for June YTD, but air arrivals to the island were up significantly for this period.

FOREIGN AIR AND SEA ARRIVALS**JUNE 2019 VS 2018****FOREIGN AIR AND SEA ARRIVALS TO THE BAHAMAS
1ST PORT OF ENTRY ONLY
JUNE 2019**

	2019	2018	2019/2018	2019	2018	2019/2018
	Air and Sea		% Chg Air/Sea	Air Only		% Chg Air
Nassau/Paradise Island	333,519	276,711	20.5%	126,094	110,295	14.3%
Grand Bahama	67,939	63,255	7.4%	5,986	7,810	-23.4%
Abaco	45,970	62,390	-26.3%	15,767	16,256	-3.0%
Andros	980	1,454	-32.6%	952	1,434	-33.6%
Berry Islands	107,736	54,622	97.2%	1,224	858	42.7%
Bimini	13,811	16,094	-14.2%	1,821	2,689	-32.3%
Cat Cay	1,518	1,998	-24.0%	375	337	11.3%
Cat Island	127	187	-32.1%	125	187	-33.2%
Eleuthera	28,885	24,665	17.1%	7,613	7,173	6.1%
Exuma	6,673	6,223	7.2%	6,596	6,138	7.5%
Half Moon Cay	32,314	30,329	6.5%	-	-	0.0%
Inagua	111	85	30.6%	46	9	411.1%
Long Island	162	179	-9.5%	162	168	-3.6%
San Salvador	1,665	1,564	6.5%	1,631	1,549	5.3%
Bahamas Overall	641,410	539,756	18.8%	168,392	154,903	8.7%

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

- Foreign arrivals for the Bahamas Overall were up by 18.8% during the month of June 2019 compared to June 2018 and air arrivals by themselves were up by 8.7%.
- Foreign arrivals to Nassau/Paradise Island were up significantly in June 2019.

ISLANDS UP JUNE

- Foreign arrivals (1st port of entry) to Nassau/Paradise Island were up by 20.5% during the month of June 2019 compared to 2018. Arrivals to Nassau/Paradise Island increased significantly during the month of June because both air and sea arrivals to the island performed well. Air arrivals by themselves were up by 14.3% and sea arrivals were up by 24.6%. The percentage growth in air arrivals to the island during the month was slower than in the previous months of 2019. However, there was good news, the percentage growth during the month was better than it had been in 20 years.
- Grand Bahama foreign arrivals were up by 7.4%, but air arrivals by themselves in June 2019 were down by 23.4%.
- Berry Islands up 97.2% and air arrivals by themselves up 42.7%;
- Eleuthera foreign arrivals were up by 17.1%, and air arrivals by themselves were up 6.1% because there was an increase in airlift into North Eleuthera from the US in 2018;
- Exuma up 7.2%;
- Half Moon Cay (cruise port only) up 6.5%;
- Inagua up 30.6%.
- San Salvador up 6.5%.

ISLANDS DOWN JUNE

- Abaco arrivals were down 26.3%;
- Andros down 32.6%;
- Bimini down 14.2% during the month. Constant power outages on the island of Bimini appeared to have influenced hotel cancellations by visitors as only one hotel on the island is said to have a generator.
- Cat Cay down 24.0%;
- Cat Island down 32.1%;
- Long Island down 9.5%;

Air Arrivals June 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 2019.

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

In June 2019, air arrivals to Nassau/Paradise Island were up by 14.3% compared to June 2018 and by the end of June 2019 YTD, they were up by 20.1%. The percentage growth in air arrivals to the island during the month was slower than in the previous months of 2019. However, there was good news, the percentage growth during the month was better than it had been in 20 years.

In June 2019, air arrivals were up significantly not only to Nassau/Paradise Island but to the Bahamas overall. In June 2019, air arrivals to the Bahamas overall were up by 8.7%, and by June 2019 YTD they were up by 15.9%.

The air arrival growth to the Bahamas overall for YTD June 2019 was influenced by the growth in the following islands: Nassau/Paradise Island, Berry Islands, Cat Cay, Eleuthera (despite the runway issues in Rock Sound), Exuma, Inagua and San Salvador.

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 June 2017 and the SLS which softly opened in December 2017). All of these hotels would have been in full operation in 2018 & in June 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%
May	72.6%	63.5%	\$ 237.93	\$ 223.26	\$ 172.77	\$ 141.79	26%	20%	18%
Jun	75.0%	68.1%	\$ 243.32	\$ 233.22	\$ 182.42	\$ 158.76	18%	14%	13%
YTD	76.5%	65.9%	\$ 280.83	\$ 257.26	\$ 214.94	\$ 169.58	31%	20%	20%

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 June 2019. The room nights sold for the large hotels as a whole also increased in every month of 2018 and into June 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 May 2019, room revenue increased by 26% compared to May 2018 and room nights sold increased by 18%;
- In June 2019, room revenue increased by 18% compared to June 2018 and room nights sold increased by 13%;

- In January to June 2019 YTD, room revenue increased by 31% compared to the same period of 2018 and room nights sold increased by 20%.

APPENDIX

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

	January to June		
	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%
May	413,944	348,392	18.8%
June	445,463	353,931	25.9%
Total YTD	2,805,079	2,456,990	14.2%

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 June 2019, but not every island experienced it. Cruise arrivals were up by 14.2% between January to June 2019 YTD and up 25.9% in the month of June 2019.
- By June 2019 YTD, cruise arrivals (1st port of entry) were up in Nassau/Paradise Island (+24.5%), Berry Islands (+41.1%), Bimini (+6.0%), and Eleuthera (+9.5%).

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

	JANUARY TO JUNE		
	2019	2018	%CHG 19/18
Nassau/Paradise Island	1,542,460	1,238,895	24.5%
Grand Bahama	260,549	298,783	-12.8%
Abaco (Castaway Cay)	148,205	185,375	-20.1%
Andros	-	-	0.0%
Berry Islands	438,399	310,787	41.1%
Bimini	12,885	12,150	6.0%
Cat Cay	-	-	0.0%
Cat Island	-	-	0.0%
Eleuthera (Princess Cay & Oth)	185,673	169,559	9.5%
Exuma	-	-	0.0%
Half Moon Cay	216,908	241,112	-10.0%
Inagua	-	329	-100.0%
Long Island	-	-	0.0%
San Salvador	-	-	0.0%
Bahamas Overall	2,805,079	2,456,990	14.2%

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.

All numbers are subject to revision.

- Cruise arrivals (1st port of entry) between January to June 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
JUNE 2019

	JUNE ONLY		
	2019	2018	%CHG 19/18
Nassau/Paradise Island	206,233	165,451	24.6%
Grand Bahama	50,663	41,703	21.5%
Abaco (Castaway Cay)	27,328	43,325	-36.9%
Andros	-	-	0.0%
Berry Islands	105,347	52,849	99.3%
Bimini	2,445	2,931	-16.6%
Cat Cay	-	-	0.0%
Cat Island	-	-	0.0%
Eleuthera (Princess Cay & Oth)	21,133	17,343	21.9%
Exuma	-	-	0.0%
Half Moon Cay	32,314	30,329	6.5%
Inagua	-	-	0.0%
Long Island	-	-	0.0%
San Salvador	-	-	0.0%
Bahamas Overall	445,463	353,931	25.9%

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

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 25.9% in the month of June 2019. More than sixty percent of the islands had increases in cruise arrivals during the month. The following islands suffered declines in cruise arrivals (1st port of entry) during the month: Abaco (-36.9%), and Bimini (-16.6%).

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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