

FOREIGN AIR AND SEA ARRIVALS

JANUARY TO SEPTEMBER 2018 VS 2017

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

	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%
Grand Total	4,921,956	4,538,123	8.5%	1,202,772	1,032,279	16.5%

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 8.5% between the months of January to September 2018 compared to the same period of 2017.
- Foreign air arrivals by themselves were up by 16.5% between the months of January to September 2018 compared to the same period of 2017.

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

	2018	2017	2018/2017	2018	2017	2018/2017
	Air and Sea			Air Only		
			% Chg Air/Sea			% Chg Air
Nassau/Paradise Island	2,714,399	2,712,161	0.1%	893,455	751,827	18.8%
Grand Bahama	545,879	501,327	8.9%	57,130	55,289	3.3%
Abaco	342,145	324,078	5.6%	98,115	82,985	18.2%
Andros	9,314	8,529	9.2%	9,161	8,318	10.1%
Berry Islands	522,971	403,328	29.7%	6,834	5,761	18.6%
Bimini	96,934	90,115	7.6%	22,094	24,262	-8.9%
Cat Cay	10,128	10,365	-2.3%	3,344	3,651	-8.4%
Cat Island	854	888	-3.8%	837	836	0.1%
Eleuthera	289,881	97,177	198.3%	49,362	38,221	29.1%
Exuma	49,054	48,997	0.1%	48,400	48,138	0.5%
Half Moon Cay	325,111	327,237	-0.6%	-	-	0.0%
Inagua	1,108	805	37.6%	104	74	40.5%
Long Island	1,195	935	27.8%	1,060	876	21.0%
San Salvador	12,983	12,181	6.6%	12,876	12,041	6.9%
Bahamas Overall	4,921,956	4,538,123	8.5%	1,202,772	1,032,279	16.5%

All numbers are subject to revision. Carnival Cruise Lines significantly increased the cruise visitors to Princess Cay, Eleuthera during the 1st eight 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 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 1st nine months 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.

Many Islands of the Bahamas experienced increases in foreign arrivals by the end of the 1st nine months of 2018:

ISLANDS UP

- Foreign Arrivals to Nassau/Paradise Island were up 0.1% by the end of September 2018, but air arrivals by themselves to the island were up by 18.8%;
 - Foreign arrivals to Grand Bahama were up by 8.9%, & air arrivals by themselves were up by 3.3% by the end of September 2018. Air arrivals to the island were up in the months of March (the month of the Easter Holiday), May, June, July, August, and September 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;
 - Out Islands up 25.4%, foreign arrivals were up for most of these islands:
 - Abaco up 5.6%;
 - Andros up 9.2%;
 - Berry Islands up 29.7%;
 - Bimini up 7.6%;
 - Eleuthera up 198.3%

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) during the 1st nine months of the year;
 - Exuma up 0.1%;
 - Inagua up 37.6%
- This increase in arrivals to Inagua was

ISLANDS UP CONT'D

- 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 27.8%;
 - San Salvador up 6.6%.

ISLANDS DOWN

- Cat Cay arrivals down 2.3%;
- Cat Island arrivals down 3.8%;
- Half Moon Cay down 0.6% (is a cruise port only).

FOREIGN AIR AND SEA ARRIVALS

SEPTEMBER 2018 VS 2017

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

	2018	2017	2018/2017	2018	2017	2018/2017
	Air and Sea			Air Only		
			% Chg Air/Sea			% Chg Air
Nassau/Paradise Island	246,345	173,683	41.8%	52,525	34,158	53.8%
Grand Bahama	29,613	26,143	13.3%	2,702	2,177	24.1%
Abaco	16,777	13,499	24.3%	2,383	2,004	18.9%
Andros	442	278	59.0%	433	278	55.8%
Berry Islands	59,774	14,398	315.2%	413	434	-4.8%
Bimini	5,412	3,856	40.4%	1,382	796	73.6%
Cat Cay	724	764	-5.2%	190	209	-9.1%
Cat Island	12	29	-58.6%	12	29	-58.6%
Eleuthera	21,353	3,210	565.2%	1,052	790	33.2%
Exuma	2,319	1,794	29.3%	2,313	1,778	30.1%
Half Moon Cay	17,681	8,864	99.5%	-	-	0.0%
Inagua	26	36	-27.8%	19	5	280.0%
Long Island	38	12	216.7%	24	12	100.0%
San Salvador	11	2	450.0%	5	2	150.0%
Bahamas Overall	400,527	246,568	62.4%	63,453	42,672	48.7%

All numbers are subject to revision. Carnival Cruise Lines significantly increased the cruise visitors to Princess Cay, Eleuthera during the month. The cruiselines that go to the Berry Islands, i.e. Norwegian Cruises and and Royal Caribbean Int'l both significantly increased the cruise visitors to the the Berry Islands during the month of September 2018 compared to September 2017. Carnival Cruise Lines also significantly increased the cruise visitors to Half Moon Cay in September 2018 compared to September 2017. In September 2017 the region was plagued with three hurricanes (Hurricane Irma, Hurricane Maria and Hurricane Jose) that caused major devasation 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 62.4% during the month of September 2018 compared to September 2017, air arrivals were also up by 48.7%. In 2017, hurricanes Irma, Maria, and Jose passed through the Caribbean and the Southern Bahamas and were heavily responsible for dragging down the arrivals during that month and in that year. September 2018 did not have any hurricanes.

ISLANDS UP SEPTEMBER

- Most of the Islands of the Bahamas were up during the month of September 2018.
- Foreign arrivals (1st port of entry) to Nassau/Paradise Island were up by 41.8% during the month of September 2018 compared to 2017, and air arrivals were up by 53.8%;
- Grand Bahama arrivals up 13.3% and air arrivals alone up 24.1%;
- Abaco up 24.3%;
- Andros up 59.0%;
- Berry Islands up 315.2% primarily because Norwegian Cruises and Royal Caribbean Int'l significantly increased their calls on Great Stirrup Cay and Coco Cay respectively during the month of September 2018 compared to September 2017;
- Bimini foreign arrivals (1st port of entry) were up by 40.4% in September 2018 compared to September 2017;
- Eleuthera up 565.2% primarily because Carnival increased calls to Princess Cay. There was also an increase in airlift into North Eleuthera from the US;
- Exuma up 29.3%;
- Half Moon Cay (cruise port only) up 99.5%;
- Long Island up 216.7%.
- San Salvador up 450.0%.

ISLANDS DOWN SEPTEMBER

- Cat Cay down 5.2%;
- Cat Island down 58.6%;
- Inagua down 27.8%

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 between the months of January to September 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

	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%
Mar	75.1%	76.5%	\$317.03	\$ 287.73	\$ 238.24	\$ 220.17	45%	28%	32%
Apr	72.4%	75.6%	\$265.17	\$ 282.84	\$ 192.04	\$ 213.71	20%	9%	28%
May	63.8%	58.7%	\$222.06	\$ 212.53	\$ 141.59	\$ 124.69	36%	22%	30%
Jun	67.9%	65.3%	\$233.12	\$ 237.76	\$ 158.19	\$ 155.16	22%	16%	24%
Jul	72.9%	73.5%	\$251.21	\$ 251.59	\$ 183.10	\$ 185.01	21%	14%	21%
Aug	65.2%	65.2%	\$217.03	\$ 223.54	\$ 141.45	\$ 145.72	24%	21%	28%
Sep	37.4%	31.8%	\$166.15	\$ 156.09	\$ 62.14	\$ 49.63	61%	54%	51%
YTD	63.4%	63.9%	\$245.35	\$ 239.27	\$ 155.62	\$ 152.77	31%	19%	27%

The Lynden Pindling Airport in Nassau in the Bahamas was closed on Sept. 8th and 9th in anticipation of Hurricane Irma. 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 tomados 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. 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 September 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 35% 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 26%;
- 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 20% compared to April 2017 and room nights sold increased by 28%;
- 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 21% compared to July 2017 and room nights sold increased by 21%;
- In August 2018, room revenue increased by 24% 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 January to September 2018 YTD, room revenue increased by 31% compared to the same period of 2017 and room nights sold increased by 27%.

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%	6.5%
Feb	60.8%	61.2%	\$ 69.07	\$ 70.46	\$ 42.01	\$ 43.13	-2%	-7%	0.2%
Mar	65.9%	62.2%	\$ 74.20	\$ 76.62	\$ 48.91	\$ 47.65	3%	7%	6.8%
Apr	66.0%	65.7%	\$ 83.43	\$ 73.99	\$ 55.09	\$ 48.64	14%	-18%	0.8%
May	60.9%	55.6%	\$ 72.76	\$ 64.99	\$ 44.30	\$ 36.14	23%	15%	10.1%
Jun	65.9%	63.3%	\$ 75.05	\$ 72.81	\$ 49.50	\$ 46.09	7%	22%	4.1%
Jul	62.0%	66.5%	\$ 65.71	\$ 67.87	\$ 40.73	\$ 45.17	-10%	5%	-6.6%
Aug	55.0%	58.7%	\$ 63.44	\$ 61.72	\$ 34.90	\$ 36.21	-4%	19%	-6.7%
Sep	32.4%	26.6%	\$ 56.52	\$ 66.53	\$ 18.29	\$ 17.69	-2%	22%	15.1%
YTD	58.2%	56.5%	\$ 70.72	\$ 69.49	\$ 41.14	\$ 39.26	4%	3%	2.4%

Hurricane Irma passed through the Bahamas in September 2017 but did not hit GBI directly but caused tomadoes 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 islds.

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. Compiled by the Research and Statistics Dept. Bahamas Ministry of Tourism

- Room revenue for the hotels in Grand Bahama increased by 4% by the end of the first nine months of 2018, and room nights sold increased by 2.4%.

APPENDIX

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

	January to September 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%
Total YTD	3,561,563	3,357,414	6.1%

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 first nine months of 2018 cruise arrivals to the Bahamas Overall were up in every month of 2018 except February and March.
- By the end of September 2018, cruise arrivals (1st port of entry) to the Bahamas were up in Abaco, Grand Bahama, Berry Islands, Bimini, Eleuthera, and Inagua.

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

	JANUARY TO SEPTEMBER 2018		
	2018	2017	%CHG 18/17
Nassau/Paradise Island	1,812,025	1,951,004	-7.1%
Grand Bahama	417,805	378,364	10.4%
Abaco (Castaway Cay)	234,111	231,658	1.1%
Andros	-	-	0.0%
Berry Islands	512,225	395,365	29.6%
Bimini	20,313	15,466	31.3%
Cat Cay	-	-	0.0%
Cat Island	-	-	0.0%
Eleuthera (Princess Cay & Oth)	239,644	58,320	310.9%
Exuma	-	-	0.0%
Half Moon Cay	325,111	327,237	-0.6%
Inagua	329	-	100.0%
Long Island	-	-	0.0%
San Salvador	-	-	0.0%
Bahamas Overall	3,561,563	3,357,414	6.1%

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