

# *Visitor Performance Report*

*May 2018*

## **Summary**

### *Total Arrivals*

Total visitor arrivals for the month of May grew 19% from the same period last year. Whilst the largest sector (in volume of arrivals) was the stay-over visitor, the greatest percentage increase was noted in the yachting sector. The numbers almost doubled over the one-year period, the bulk of which (74.5%) originated from the IGY Rodney Bay Marina. The 41% increase in cruise arrivals however, stemmed from the re-opening of the births at Pointe Seraphine and the ability of the facility to now accommodate mega cruises. See Table 1.

*Table 1: Total Visitor Arrivals (May 2017/2018)*

<b>Type of Visitor</b>	<b>2017</b>	<b>2018</b>	<b>% Increase</b>
Stay-Over	31,436	32,277	3%
Cruise	16,223	22,802	41%
Yacht	2,680	4,901	83%
<b>Total</b>	<b>50,339</b>	<b>59,980</b>	<b>19%</b>

### *Stay-Over Arrivals*

In May this year, the island recorded 32,277 stay-over arrivals – the largest number on record for the month of May. It also marked a 3% increase over last year’s figure. Considerable increases were noted from key source markets, namely the US (4%), Caribbean (9%) and France (28%). The largest decrease in arrivals however, was recorded from the Canadian market, which dropped 22% from last year. This decrease could have stemmed from the 28% reduction in seats, following the earlier termination of the Sunwing flight from Toronto this month. The UK market also experienced a 1% drop in arrivals 23% although the cessation of the Thomson Airways flight from London, resulted in a 23% decline in seats. See Table 2.

*Table 2: Arrivals and Airlift, by Market*

Market	Stay-Over Arrivals	% Difference	Airlift	% Difference
US	15,023	4%	18,120	2%
UK	7,008	-1%	10,174	-23%
Caribbean	6,674	9%	13,108	0%
Canada	1,758	-22%	1,815	-28%
Rest of Europe	593	-2%	-	-
Germany	121	-2%	-	-
France	598	28%	-	-
Rest of World	502	3%	-	-
<b>Total</b>	<b>32,277</b>	<b>3%</b>	<b>43,217</b>	<b>-7%</b>

### *YTD May*

Visitor arrivals for the year thus far are on the increase in all sectors. Cruise arrivals, which make up roughly two-thirds (67%) of total visitor arrivals have grown 11%; stay-over arrivals, the second largest sector (27% market share), by 5%; and yachting, though the smallest sector (6%) has recorded the largest percentage increase – 32%.

*Table 3: Total Visitor Arrivals (YTD April 2017/2018)*

Type of Visitor	2017	2018	% Increase
Stay-Over	166,236	174,864	5.2%
Cruise	392,283	433,847	10.6%
Yacht	27,640	36,469	31.9%
<b>Total</b>	<b>586,159</b>	<b>645,180</b>	<b>10.1%</b>

### *Future Analysis*

The summer months of June, July, August and September are still pacing behind the same period last year, according to reports from hoteliers, tour operators and airlines. It is believed that many visitors, particularly from the US are opting for late bookings to avoid being caught in unexpected hurricanes. The winter period however (October 2018 – April 2019), is set to perform better than previous years.

## May Airlift by Market

### US

Total airlift from the US Market increased 2% in 2018. The more significant increases were noted from American Airlines' service out of Charlotte, which ran three more flights this month than last May, whilst Delta increased the size of the aircraft from a 160 to a 180-seater, as well as increased frequency from four times a week to a daily service in 2018. The main loss in airlift this month came from Delta's weekly service out of Atlanta, which stopped in March this year, as opposed to August last year.

*Table 4: Airlift from US (May 2017/2018)*

Airline	2017	2018	% Difference
AA 823 (Charlotte)	1,200	1,584	32%
AA 2297 (Miami)	5,642	5,642	0%
Delta 339 (ATL)	4,960	5,580	13%
Delta 329 (ATL)	640	0	-100%
Jet Blue 881 (JFK)	4,650	4,650	0%
United Airlines 1642 (NJ)	668	664	-1%
<b>TOTAL US Seats</b>	<b>17,760</b>	<b>18,120</b>	<b>2%</b>

### UK

Airlift from the UK was down 23% in May, mainly from the absence of the Thomson Airways' weekly service this month. Virgin Atlantic also reduced frequency from four to three flights/week this May.

*Table 5: Airlift from UK (May 2017/2018)*

Airline	2017	2018	% Difference
British Airways	7,006	7,006	0%
Virgin Atlantic	4,788	3,168	-34%
Thomson Airways	1,380	0	-100%
<b>TOTAL UK Seats</b>	<b>13,189</b>	<b>10,174</b>	<b>-23%</b>

## Canada

All three of the airlines from Canada experienced reduced airlift this May, resulting in an overall drop in seats of 28%. Both WestJet and Air Canada utilized their smaller aircrafts more times this month, than last May, whilst Sunwing Airlines only operated one flight this month, compared to four flights last year.

*Table 6: Airlift from Canada (May 2017/2018)*

Airline	2017	2018	% Difference
WestJet	672	570	-15%
Air Canada (968) YYZ	1,088	1,056	-3%
Sunwing (756) YYZ	756	189	-75%
<b>TOTAL Canada Seats</b>	<b>2,516</b>	<b>1,815</b>	<b>-28%</b>

## Caribbean

The total number of seats available from the Caribbean remained relatively unchanged month on month, although there were some changes experienced by the individual airlines. The introduction of InterCaribbean Airways earlier this year added over 300 seats this month. These additional seats were however negated by the reduction in frequency of service from Air Caribbes and Air Antilles this month, which resulted in a 33% and 14% drop in seats, respectively.

*Table 7: Airlift from Canada (May 2017/2018)*

Airline	2017	2018	% Difference
LIAT	9,200	9,250	1%
Air Caribbes	1,050	700	-33%
Air Antilles	800	690	-14%
Caribbean Airlines	2,108	2,108	0%
InterCaribbean Airways	0	360	100%
<b>TOTAL Caribbean Seats</b>	<b>13,158</b>	<b>13,108</b>	<b>0%</b>