

Q1 | 2011



GOVERNMENT OF BERMUDA
Cabinet Office
Department of Statistics

Quarterly Bulletin of Statistics

Q1 2011 Highlights

Air Arrivals: Bermuda hosted 30,824 tourists

Tourist Accommodations: Hotel Gross Receipts amounted to \$26 million

Hotel Employment: The Hotel Industry employed 2,297 workers

Overseas Spending: Consumers declared overseas purchases of \$13 million

Retail: Gross turnover in the retail sector reached \$228 million

Imports: Payments for imported good totalled \$215 million

Visitors Arrivals and Expenditure:

Air Arrivals

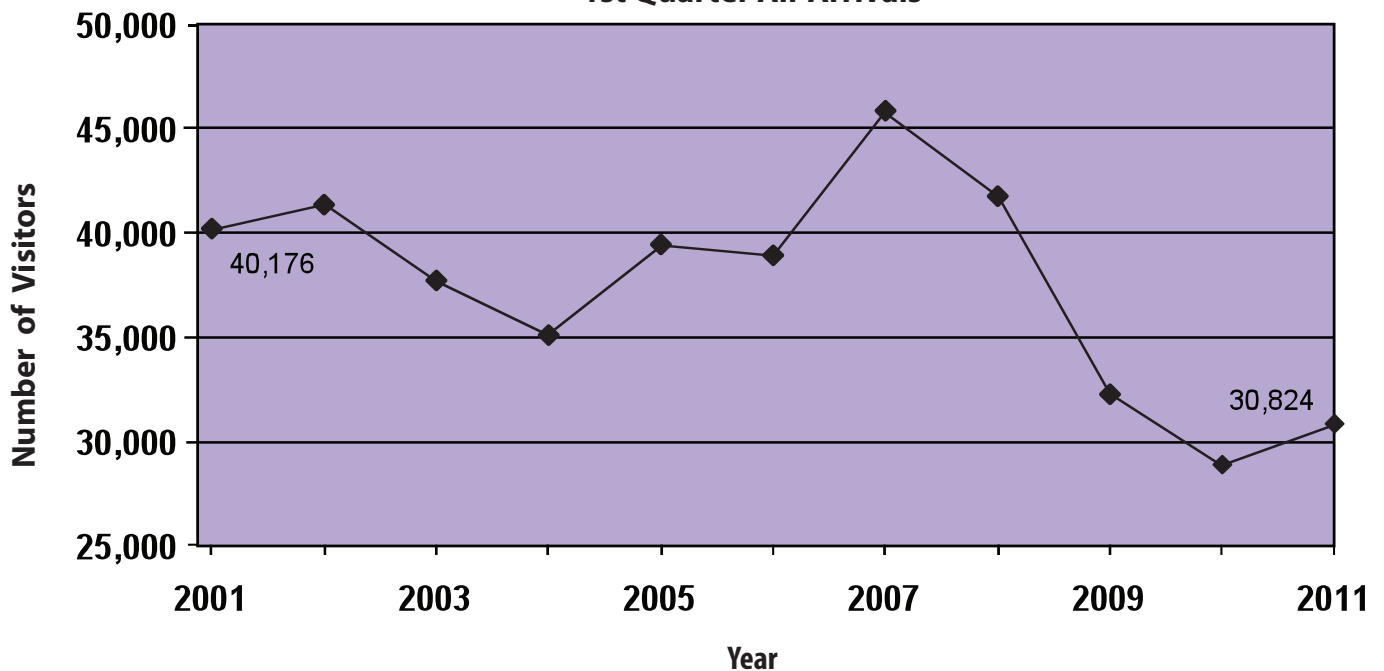
The number of visitors arriving in Bermuda by air rose by 6.8 per cent in the first quarter of 2011. This marked the first increase in first quarter air arrivals since 2007. The growth in air arrivals was attributed mostly to an increase in visitors from Canada.

Arrivals from the United States, Bermuda's largest tourist market, increased 2.7 per cent compared to the first quarter of 2010. A total of 19,705 U.S. visitors travelled to the Island compared with 19,181 visitors in the same period of 2010. Arrivals from Canada continued to grow as a direct result of the introduction of flights by WestJet Airlines in the 2nd quarter of 2010. Air arrivals from Canada jumped by 50 per cent to 6,469 visitors compared to 4,314 visitors in the same period of 2010.

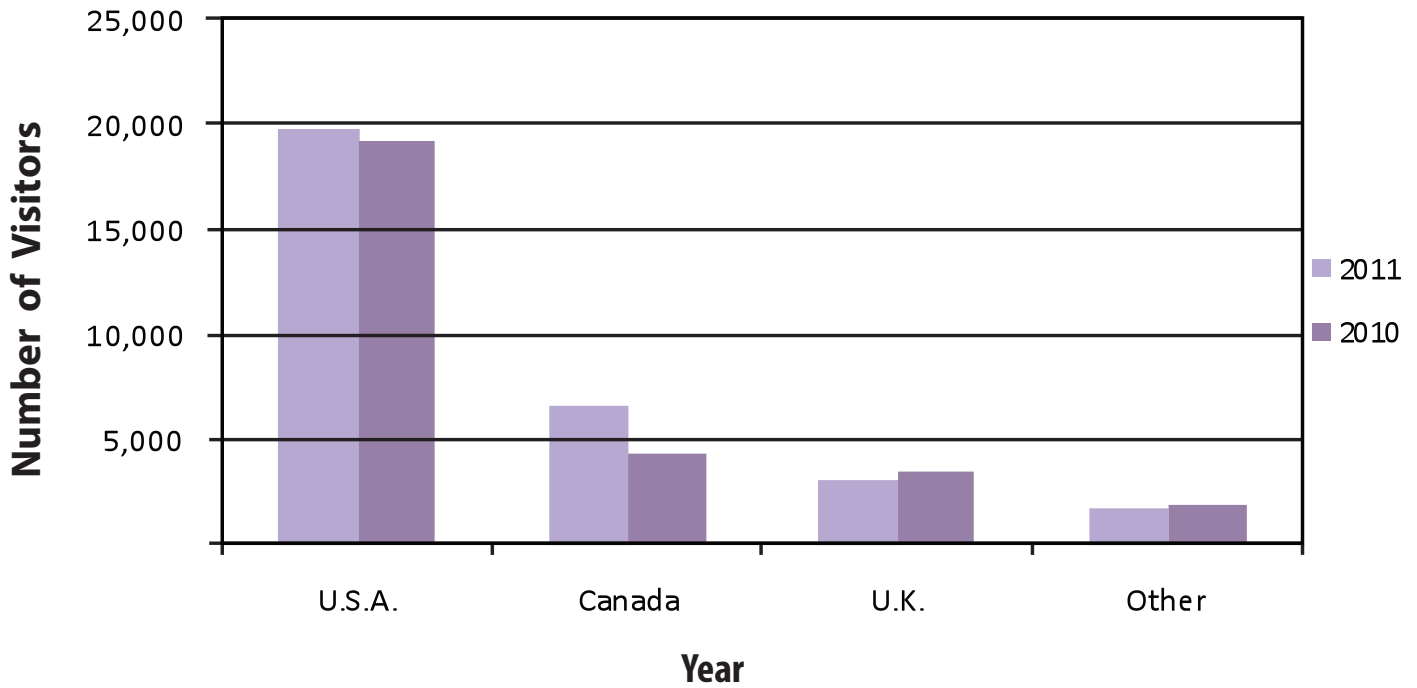
Fewer air arrivals were recorded from the United Kingdom (-13.7 per cent) and from all other countries (-12.9 per cent) during the quarter.

The overall growth in air arrivals translated into additional bookings at hotels, cottage colonies and clubs, and guest houses. Resort hotels recorded the largest increase in occupancy levels as the number of guest rose by 14.2 per cent, from 13,480 to 15,395 persons. The number of visitors residing at small hotels, cottage colonies and clubs grew by 8.7 per cent, while tourists bookings at guest houses increased by 5.1 per cent. In contrast, guests staying at private homes and housekeeping accommodations declined by 6.6 per cent and 6.2 per cent, respectively.

1st Quarter Air Arrivals



1st Quarter Air Arrivals by Country of Residence



Expenditure by Air Arrivals

The rise in the number of air passengers to the Island translated into an increase in total expenditure by air visitors in the first quarter. Expenditure by air visitors soared by 31.2 per cent to \$39.8 million. This represented an increase of \$9.5 million over the same period in 2010.

In addition to the greater volume of air visitors on Island, the average expenditure per person rose by 23.6 percent to \$1,268 from \$1,026 a year ago. The largest component of visitor expenditure was accommodation cost which represented nearly 51.7 per cent of all monies spent. In addition, spending on meals and beverages in restaurants accounted for another 24.7 per cent of air visitor outlays.

Cruise Arrivals and Expenditure

Bermuda’s ports hosted one cruise liner carrying 675 passengers, compared to the two smaller cruise liners in the same



period of 2010. This resulted in 310 less cruise visitors during the quarter. Total expenditure for these passengers was estimated at \$118,091.

Hotel Gross Receipts

Total revenue for the hotel industry rose by 11.7 per cent to \$25.9 million. Cottage colonies, resort hotels, and other guest

TABLE 1 – VISITOR ARRIVALS

Air Visitors by Country of Origin							
	Cruise Passengers	U.S.A.	Canada	U.K.	Other	Total ⁽¹⁾	Cruise & Air Visitors
2008							
1st Qtr	2,799	28,847	5,869	4,316	2,697	41,729	44,528
2nd Qtr	129,344	65,262	8,193	8,541	5,459	87,455	216,799
3rd Qtr	114,233	61,691	6,763	10,006	6,003	84,463	198,696
4th Qtr	40,032	33,588	6,382	6,392	3,604	49,966	89,998
Year	286,408	189,388	27,207	29,255	17,763	263,613	550,021
2009							
1st Qtr	0	21,549	4,989	3,468	2,229	32,235	32,235
2nd Qtr ^a	124,553	56,766	7,308	6,899	4,012	74,985	199,538
3rd Qtr	141,828	61,184	6,420	7,760	4,583	79,947	221,775
4th Qtr	52,147	33,152	6,149	5,779	3,619	48,699	100,846
Year	318,528	172,651	24,866	23,906	14,443	235,866	554,394
2010							
1st Qtr	985	19,181	4,314	3,457	1,913	28,865	29,850
2nd Qtr	171,295	57,243	10,368	6,283	3,618	77,512	248,807
3rd Qtr	149,015	58,783	8,122	7,948	3,953	78,806	227,821
4th Qtr	26,636	30,809	7,598	5,552	3,120	47,079	73,715
Year	347,931	166,016	30,402	23,240	12,604	232,262	580,193
2011							
1st Qtr	675	19,705	6,469	2,983	1,667	30,824	31,499

1. Excludes ship and yacht visitors

Source: Tourism Department

accommodations reported sales revenue increases of 20.2 per cent, 13.0 per cent and 11.9 per cent, respectively. In contrast, small hotels experienced a decline of 20.0 per cent in sales revenue. Monies earned from room sales accounted for 56.6 per cent of total gross receipts, while food sales and alcohol sales contributed 22.8 per cent and 6.5 per cent, respectively.

Hotel Employment

Hotel employment during the first quarter of 2011 decreased marginally by 0.3 per cent, or 6 workers versus the same period in 2010. At the end of January 2011, there were 2,297 employees in the hotel industry. Total employment within resort hotels

reported an increase of 29 employees, while cottage colonies and housekeeping, and guest houses and smaller tourist properties reported decreases of 33 and 2 employees, respectively.

Major resort hotels remained the largest employer in the accommodations industry, employing 1,895 workers or 82.5 per cent of the total industry. Cottage colonies and housekeeping units employed 16.8 percent of the hotel industry workforce, representing 385 workers. Guest houses and smaller tourist properties continued to employ less than one per cent of workers in the accommodations industry, with 17 employees.



TABLE 2 – VISITORS BY INTENDED TYPE OF ACCOMMODATION

	Resort Hotels	Small Hotels, Cottage Colonies & Clubs	Housekeeping Accommodations ⁽³⁾	Guest Houses ⁽⁴⁾	Private Homes ⁽¹⁾	Not Stated	Total ⁽²⁾
2008							
1st Qtr	22,065	6,567	2,111	410	10,521	55	41,729
2nd Qtr	40,613	17,515	5,800	732	22,312	483	87,455
3rd Qtr	37,132	16,235	5,441	694	24,751	210	84,463
4th Qtr	22,329	8,747	2,581	455	15,751	103	49,966
Year	122,139	49,064	15,933	2,291	73,335	851	263,613
2009							
1st Qtr	15,640	5,041	1,422	297	9,787	48	32,235
2nd Qtr	34,142	15,191	4,079	585	20,712	276	74,985
3rd Qtr	35,560	20,250	2,344	596	20,807	390	79,947
4th Qtr	22,015	11,900	1,424	416	12,551	393	48,699
Year	107,357	52,382	9,269	1,894	63,857	1,107	235,866
2010							
1st Qtr	13,480	6,475	1,072	314	7,368	156	28,865
2nd Qtr	35,182	19,409	2,443	673	18,930	875	77,512
3rd Qtr	34,660	19,979	2,217	674	20,675	601	78,806
4th Qtr	21,201	11,625	1,389	406	12,176	282	47,079
Year	104,523	57,488	7,121	2,067	59,149	1,914	232,262
2011							
1st Qtr	15,395	7,037	1,006	330	6,882	174	30,824

1. This category includes persons staying in commercial accommodations with less than twelve beds, as well as persons visiting with friends and relatives.

2. Excludes cruise visitors.

3. Includes Cottage Suites/Apt. and Inns

4. Includes Bed & Breakfast

Source: Tourism Department

Overseas Spending by Residents

Residents declared overseas purchases valued at \$12.9 million during the quarter. This total represented a drop of 3.0 per cent compared to the same period in 2010. In comparison, domestic retail sales were also down 5.8 per cent during the first quarter of 2011.

Returning residents declared purchases totalling \$5.8 million on clothing and footwear, a decrease of 4.4 per cent compared to the same quarter last year. Clothing and footwear purchases represented 45.1 per cent of total overseas

purchases by residents. Outlays on household items, furniture and appliances were 14.9 per cent lower than the previous year. Declarations on tapes and compact discs recorded a fall of 27.3 per cent, the largest of all sectors. Expenditure on electronic and photographic equipment saw minimal change.

Increases in overseas spending were reported across other sectors and included greater purchases of computer hardware and software (5.2 per cent), toys and sports goods (3.7 per cent), tools, machinery and parts (2.7 per cent), and jewellery and watches (1.9 per cent).

Retail Sales

Consumer spending on retail good decreased during the first quarter of 2011 as the quarterly index of retail sales fell by 5.8 per cent year-over-year. The gross turnover in the retail sector was estimated at \$228.3 million. This reflected a decrease in sales activity of \$14.5 million when compared to the \$242.1 million recorded in 2010. All sectors in the index reported declines, with the exception of service stations which registered a gain of 1.6 per cent.

Motor vehicle dealers continued to experience weak sales, registering a

TABLE 3 – ESTIMATED EXPENDITURE OF VACATION AND BUSINESS VISITORS – \$MILLION

	Air Visitors			Cruise Visitors	Total Expenditure ⁽²⁾
	Accommodation and Food	Shopping, Entertainment, Transport, Etc.	Total ⁽¹⁾		
2008					
1st Qtr	42.1	12.4	54.5	0.4	54.9
2nd Qtr	88.2	26.0	114.2	26.1	140.3
3rd Qtr	85.1	25.1	110.2	23.1	133.3
4th Qtr	50.4	14.8	65.2	8.1	73.3
Year	265.8	78.3	344.1	57.7	401.8
2009					
1st Qtr	22.5	7.2	29.7	0.0	29.7
2nd Qtr	66.2	20.5	86.7	25.4	112.1
3rd Qtr	74.8	20.2	95.0	28.9	123.8
4th Qtr	43.1	11.9	55.0	10.6	65.6
Year	206.6	59.8	266.4	64.9	331.3
2010					
1st Qtr	23.8	6.5	30.3	0.2	30.5
2nd Qtr	94.6	22.4	117.0	30.0	147.0
3rd Qtr	90.2	22.9	113.1	26.1	139.2
4th Qtr	48.7	13.8	62.5	4.7	67.2
Year	257.3	65.6	322.9	61.0	383.9
2011					
1st Qtr	29.8	10.0	39.8	0.1	39.9

1. Air visitors subtotals are not comparable prior to 2004.

2. Estimates for air and cruise expenditure includes departure tax.

Source: Department of Statistics

strong decline of 22.6 per cent. This was attributed to consumers choosing to purchase motorcycles in favour of cars. The lack of activity in the construction industry drove the sales index of the building materials sector down 14.4 per cent. Liquor stores (-5.6 per cent), food stores (-2.6 per cent) and apparel stores (-1.2 per cent), all experienced moderate declines in sales.

Imports

Goods valued at \$215 million were imported during the first quarter of 2011,

the lowest first quarter imports total since 2003. Imports decreased by 10 per cent from \$239 million in the previous year, as five of the nine commodity groups recorded double-digit declines. Amongst the broad commodity groupings, imports of fuels declined by 35.5 per cent, basic materials and semi-manufactured goods declined by 27.2 per cent and machinery declined by 26.2 per cent. Imports of transport equipment and food, beverages and tobacco declined by 23.3 per cent and 13.3 per cent, respectively. The reduction in the importation of fuels,

materials, machinery and transport equipment was mostly attributed to the lack of construction activity as well as the decrease in sales of motor vehicles.

In contrast, imports of finished equipment, chemicals, and clothing grew by 12.9 per cent, 8.4 per cent and 3.7 per cent, respectively.

TABLE 4 – EMPLOYMENT IN HOTEL INDUSTRY BY TYPE OF ESTABLISHMENT ⁽¹⁾

	Hotels	Cottage Colonies and Housekeeping	Guest Houses and Micro-Units ⁽²⁾	All Establishments
2008				
1st Qtr January	1,930	509	17	2,456
2nd Qtr April	1,944	630	16	2,590
3rd Qtr July	2,023	633	12	2,668
4th Qtr October	2,070	589	20	2,679
2009				
1st Qtr January	1,968	450	23	2,441
2nd Qtr April	1,986	544	18	2,548
3rd Qtr July	2,125	569	15	2,709
4th Qtr October	2,020	561	14	2,595
2010				
1st Qtr January	1,866	418	19	2,303
2nd Qtr April ^R	1,952	464	19	2,435
3rd Qtr July	2,027	519	19	2,565
4th Qtr October	1,972	480	17	2,469
2011				
1st Qtr January	1,895	385	17	2,297

1. As at the end of each reference month. 2. Micro units are establishments having a capacity of 6–11 beds

Source: Department of Statistics

TABLE 5 – RETAIL SALES INDEX ⁽¹⁾ Average Monthly Sales 2006 = 100.0

	Total	Food Stores	Liquor Stores	Motor Vehicle Dealers	Service Stations	Building Materials	Apparel Stores	All Other Store Types
2008								
1st Qtr	95.1	104.2	85.8	90.5	103.0	90.9	79.2	93.9
2nd Qtr	108.0	114.3	107.5	92.2	124.3	102.5	115.9	107.0
3rd Qtr	109.1	119.2	120.0	94.9	131.0	93.1	99.2	108.4
4th Qtr	111.7	121.7	107.7	85.2	109.4	85.6	123.1	117.9
Year	106.0	114.9	105.3	90.7	116.9	93.0	104.4	106.8
2009								
1st Qtr	92.9	110.6	81.3	80.9	93.8	83.6	62.4	91.9
2nd Qtr	104.7	121.2	103.2	92.5	105.8	98.6	90.9	99.0
3rd Qtr ^R	105.1	125.2	133.8	87.5	113.6	91.8	84.0	99.4
4th Qtr	107.2	122.7	128.3	75.7	107.3	73.8	119.5	109.0
Year ^R	102.5	119.9	111.7	84.2	105.1	87.0	89.2	99.8
2010								
1st Qtr ^R	90.2	113.7	98.2	80.2	104.7	66.6	58.5	83.5
2nd Qtr	99.9	120.4	102.3	73.7	113.5	73.1	89.9	97.7
3rd Qtr	97.6	124.8	131.0	61.4	113.3	66.5	79.7	95.6
4th Qtr	102.2	122.5	124.1	64.6	108.7	53.8	116.7	104.5
Year ^R	97.5	120.3	113.9	70.0	110.1	65.0	86.2	95.3
2011								
1st Qtr	85.0	110.7	92.7	62.1	106.4	57.0	57.8	80.1

1. Quarterly averages derived from monthly series

Source: Department of Statistics

TABLE 6 – RESIDENT PURCHASES ABROAD ⁽¹⁾ \$'000

	Clothing & Footwear	Electronic & Photographic Equipment	Hhld items Furniture & Appliances	Toys & Sports Goods	Tapes & Compact Discs	Computer Hardware & Software	Jewellery & Watches	Tools Machinery & Parts	Misc.	Total
2008										
1st Qtr	6,601	1,394	690	688	647	863	528	261	3,516	15,188
2nd Qtr	9,480	1,392	705	643	550	684	557	267	3,951	18,229
3rd Qtr	8,999	1,577	683	735	658	788	594	254	4,717	19,005
4th Qtr	9,982	2,006	791	1,038	804	904	632	268	4,626	21,050
Year	35,062	6,369	2,869	3,104	2,659	3,239	2,311	1,050	16,810	73,472
2009										
1st Qtr	6,245	1,322	588	568	548	761	422	253	3,263	13,970
2nd Qtr	10,250	1,379	694	661	542	734	572	272	4,018	19,122
3rd Qtr	9,426	1,556	746	773	568	912	645	301	4,538	19,465
4th Qtr	9,971	1,959	754	1,065	661	877	635	292	4,474	20,688
Year	35,892	6,216	2,782	3,067	2,319	3,284	2,274	1,118	16,293	73,245
2010										
1st Qtr	6,095	1,180	563	544	429	658	414	224	3,226	13,333
2nd Qtr	9,693	1,278	629	586	415	844	490	247	3,967	18,149
3rd Qtr	9,108	1,425	641	701	439	941	607	296	4,444	18,602
4th Qtr	10,169	2,099	708	1,087	566	1,045	708	265	4,785	21,432
Year	35,065	5,982	2,541	2,918	1,849	3,488	2,219	1,032	16,422	71,516
2011										
1st Qtr	5,827	1,181	479	564	312	692	422	230	3,222	12,929

1. Value of goods as declared to H.M. Customs on entry or re-entry to Bermuda. Does not include purchases through mail-order or on the internet.

Source: H.M. Customs

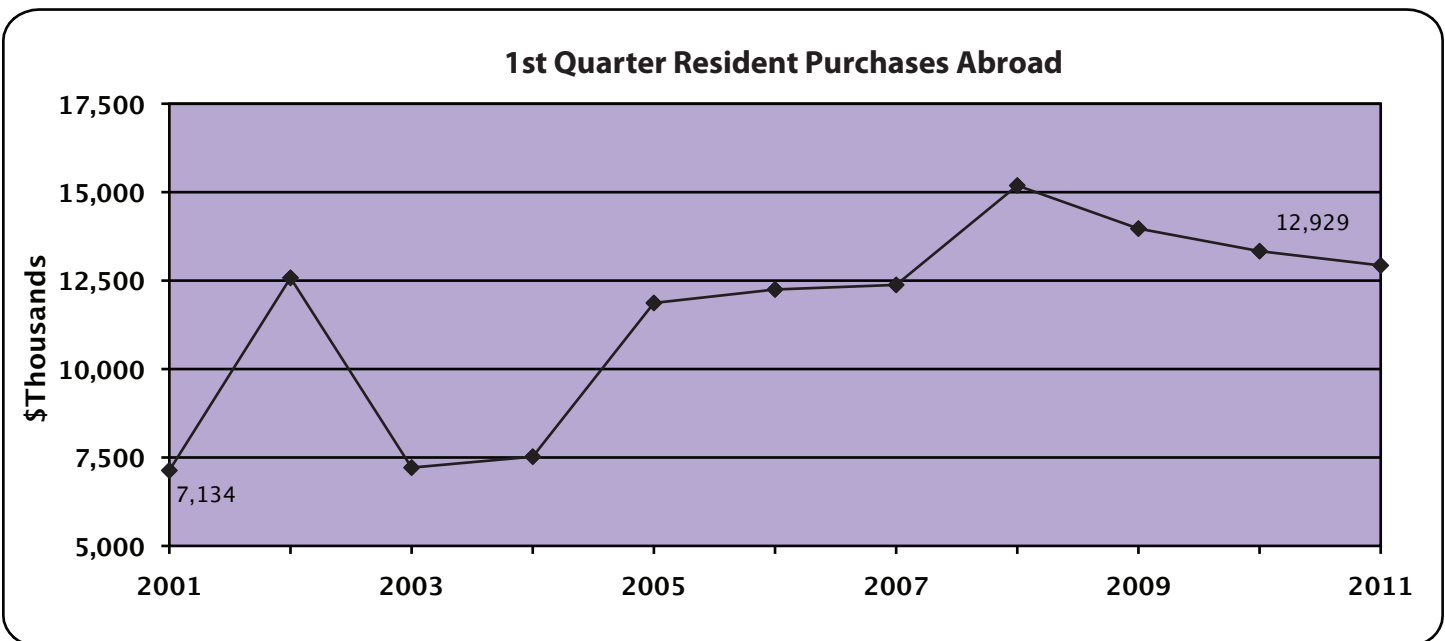


TABLE 7 – HOTEL GROSS RECEIPTS \$000

	Resort Hotels	Small Hotels	Cottage Colonies	Other	Total
2008					
1st Qtr	33,367	667	1,362	598	35,994
2nd Qtr	84,948	10,182	2,103	560	97,793
3rd Qtr	72,530	11,246	2,009	813	86,598
4th Qtr	47,010	4,198	1,358	596	53,162
Year	237,855	26,293	6,832	2,567	273,547
2009					
1st Qtr	24,175	1,601	1,168	460	27,404
2nd Qtr	59,552	5,242	1,613	449	66,856
3rd Qtr	63,569	7,334	1,340	532	72,775
4th Qtr	39,604	2,748	1,037	484	43,873
Year	186,900	16,925	5,158	1,925	210,908
2010					
1st Qtr	20,885	1,063	779	428	23,155
2nd Qtr	61,222	6,531	1,589	413	69,755
3rd Qtr ^a	62,562	6,257	1,566	563	70,948
4th Qtr	36,981	2,296	1,054	515	40,846
Year	181,650	16,147	4,988	1,919	204,704
2010					
1st Qtr	23,604	850	937	451	25,842

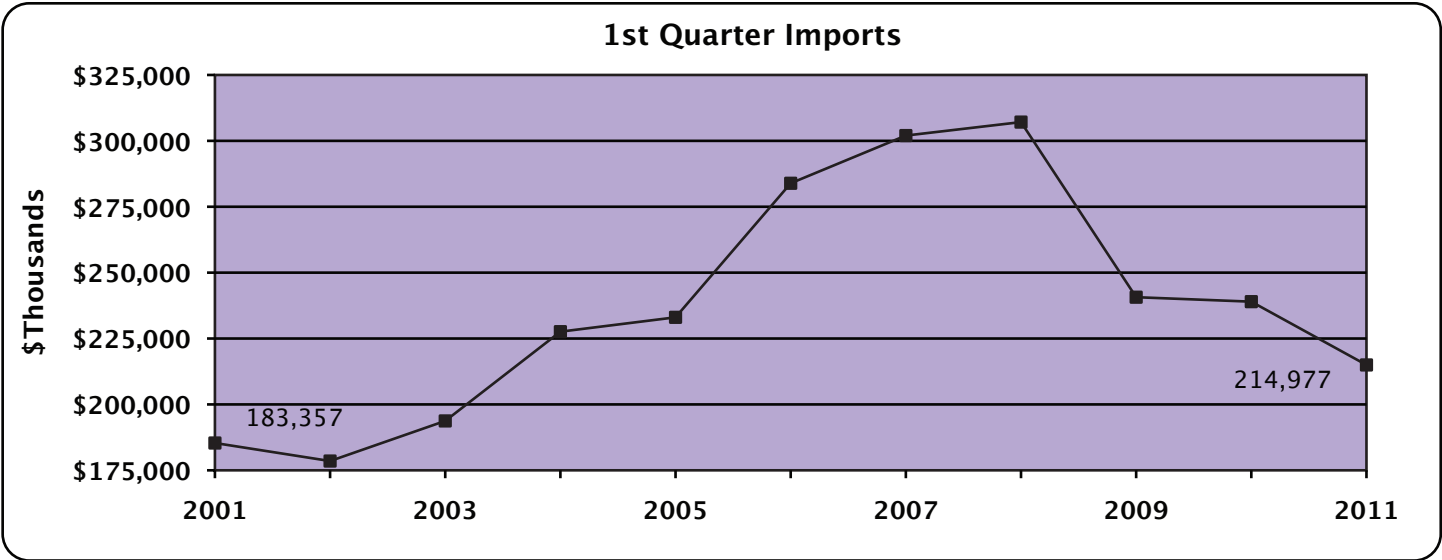
Source: Tourism Department

 TABLE 8 – IMPORTS BY COMMODITY GROUPS⁽¹⁾ \$000 f.o.b.

	Food Beverages & Tobacco	Clothing	Fuels	Chemicals	Basic Materials & Semi-Mfg	Machinery	Transport Equipment	Finished Equipment	Misc.	Total ²
2008										
1st Qtr	52,606	7,537	28,097	27,598	27,338	55,585	16,265	92,087	6	307,119
2nd Qtr	49,777	9,318	23,721	25,242	28,005	59,112	17,577	84,550	229	297,531
3rd Qtr	49,788	5,568	29,257	23,884	22,110	53,106	15,072	63,832	1	262,616
4th Qtr	43,853	7,789	21,842	25,894	22,618	52,081	13,032	90,285	366	277,760
Year ^a	196,024	30,212	102,917	102,618	100,071	219,884	61,946	330,754	602	1,145,027
2009										
1st Qtr	42,839	5,719	25,285	23,473	19,787	42,881	11,024	67,418	246	238,672
2nd Qtr	41,296	7,789	26,616	21,381	22,814	52,657	19,912	81,276	11	273,752
3rd Qtr	54,248	6,744	31,129	25,579	20,570	40,834	14,853	69,957	33	263,947
4th Qtr	48,450	6,709	33,119	23,771	19,917	38,380	11,908	92,375	20	274,650
Year	186,833	26,961	116,149	94,204	83,088	174,752	57,697	311,026	310	1,051,021
2010										
1st Qtr	44,118	6,114	25,991	21,829	17,391	46,948	10,393	66,203	–	238,987
2nd Qtr	45,405	6,693	23,515	23,219	18,594	36,381	14,292	80,258	1	248,358
3rd Qtr ^a	44,419	6,767	32,687	26,581	16,267	35,563	7,857	75,484	11	245,636
4th Qtr	39,424	6,514	15,575	25,109	15,499	37,096	9,068	88,015	9	236,309
Year	173,366	26,088	97,768	96,738	67,751	155,988	41,610	309,960	21	969,290
2010										
1st Qtr	38,235	6,338	16,756	23,662	12,652	34,643	7,968	74,717	6	214,977

 1. The above figures have been adjusted to exclude goods not changing ownership
 2. Figures may not add up to totals due to rounding

Source: Tourism Department



Symbols used in tables:

- (..) not available
- (-) nil or negligible
- (e), (p) estimated or provisional figure revised figure
- (R) revised figure
- Q1 1st quarter (Jan.-Mar.)
- Q2 2nd quarter (Apr.-Jun.)
- Q3 3rd quarter (Jul.-Sep.)
- Q4 4th quarter (Oct.-Dec.)

Other Statistical Publications:

- Monthly Consumer Price Index
- Monthly Retail Sales Index
- Annual Facts and Figures Pamphlet
- Annual Employment Survey Brief
- Report on the 2000 Census of Population & Housing
- Bermuda Labour Force Trends
- Bermuda Social Dynamics
- The Changing Face of Bermuda's Seniors Report
- The 2004 Household Expenditure Survey (HES) Report
- Literacy in Bermuda



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