

# Q1 | 2013



GOVERNMENT OF BERMUDA  
Cabinet Office  
Department of Statistics

## Quarterly Bulletin of Statistics

### Q1 2013 Highlights

#### Air Arrivals:

Bermuda hosted 31,300 tourists

#### Tourist Accommodations:

Hotel gross receipts amounted to \$33.3 million

#### Hotel Employment:

The Hotel Industry employed 2,375 workers

#### Overseas Spending:

Consumers declared overseas purchases of \$11.5 million

#### Retail:

Gross turnover in the retail sector reached \$229.2 million

### Visitors Arrivals and Expenditure:

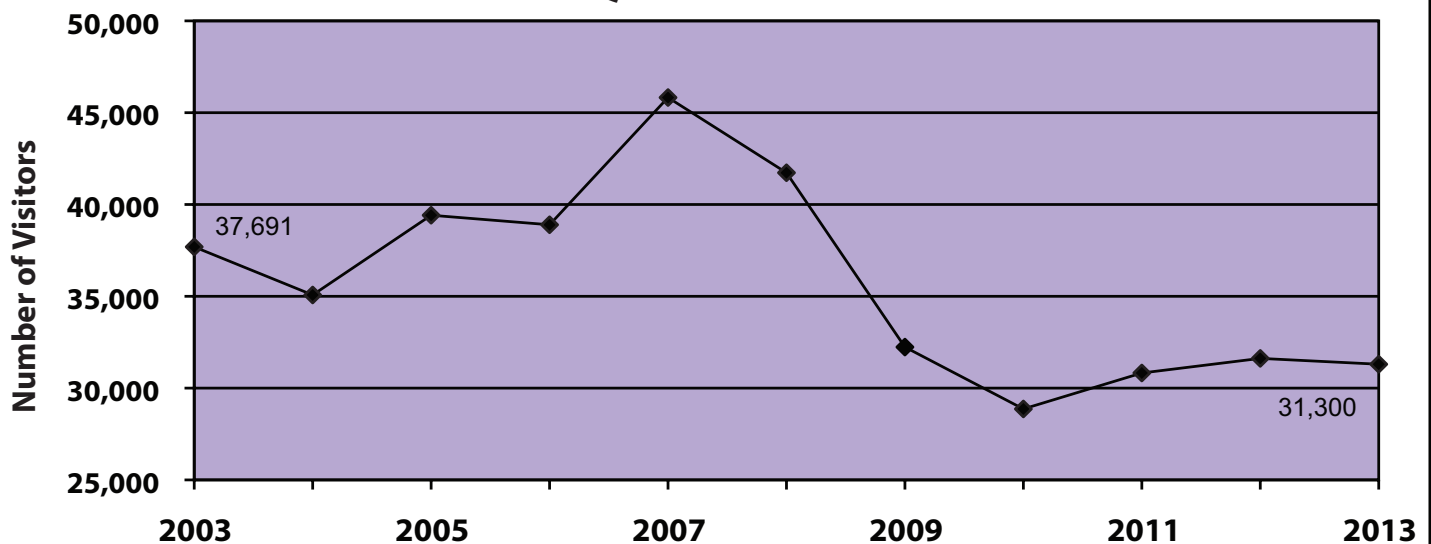
#### Air Arrivals

Air arrivals during the first quarter of 2013 dipped 1.0 per cent when compared to the same quarter of 2012. The Island hosted 31,300 visitors in the first three months of the year, down from 31,619 visitors in 2012. This decline was partly attributed to the reduction in airline flights by WestJet and Air Canada which resulted in a 14.0 per cent drop in visitors from Canada.

Arrivals from the United States, Bermuda's strongest tourist market, increased 1.0 per cent to 19,992 visitors. Air arrivals from the United Kingdom and all other countries increased by 13.5 per cent and 6.4 per cent, respectively.

The reduction in first quarter air arrivals resulted in a decrease of 5.0 per cent in occupancy levels at resort hotels. Private homes accommodated 248 more guests compared to a year ago while occupancy at housekeeping accommodations increased by 115 guests. The number of visitors staying in guest houses and small hotels, cottage colonies and clubs also rose above the levels reached in the previous year.

1st Quarter Air Arrivals





### Expenditure by Air Arrivals

The decrease in the number of air passengers to the Island translated into a decline in total expenditure by air visitors in the first quarter. Air visitor expenditure was estimated at \$33.8 million, a decrease of \$1.3 million from the same quarter in 2012.

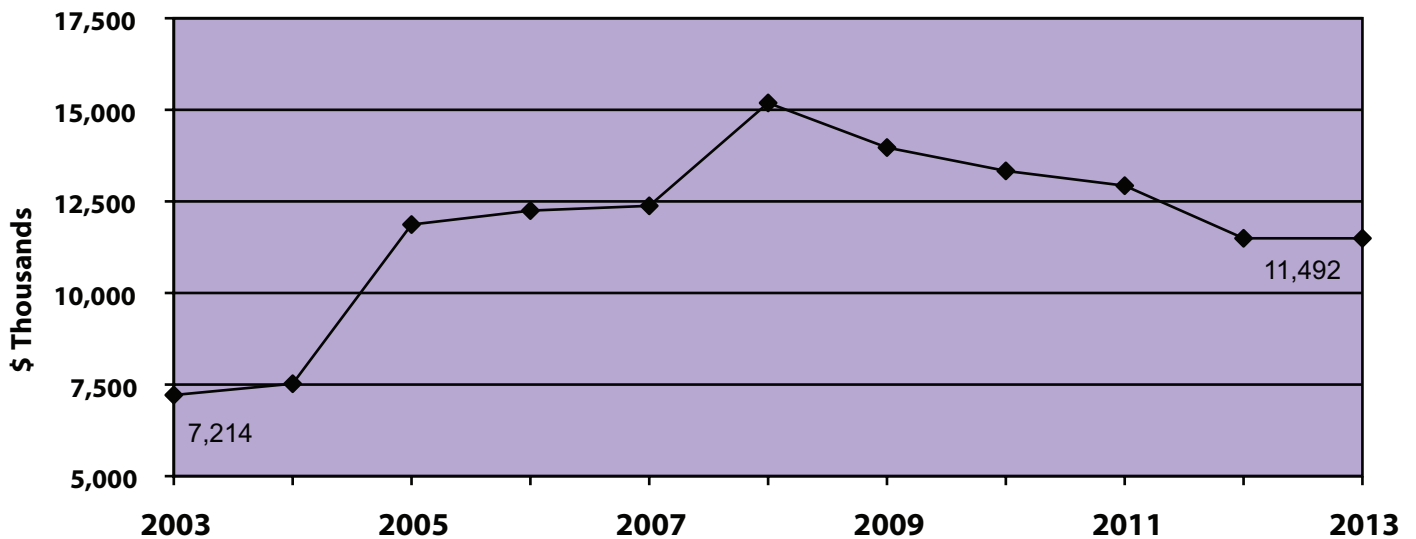
The average expenditure per visitor dipped by 2.7 per cent to \$1,054 from \$1,083 a year ago. Accommodation expenditure, which represented 47.5 per cent of all

monies spent by air arrivals, decreased 3.9 per cent. Spending on meals and beverages in restaurants slipped by 16.1 per cent. In contrast, outlays on recreational and leisure activities by air tourists increased a strong 40 per cent. Purchases of groceries/liquor supplies and transportation expenses were up by 23.1 per cent and 9.5 per cent, respectively. Expenditure on gifts and souvenirs and other shopping purchases remained unchanged during the quarter.

### Cruise Passenger Arrivals & Expenditure

Cruise ship arrivals during the first quarter of 2013 fell 45.4 per cent. A total of 1,484 cruise passengers travelled to Bermuda during the first quarter of 2013 compared to 2,719 passengers in 2012. Although the same number of cruise ship calls was made to Bermuda's ports compared to a year ago, the smaller cruise ship liners contributed to fewer cruise visitors during the quarter. Total expenditure for these passengers was estimated at \$0.3 million.

1st Quarter Resident Purchases Abroad



**TABLE 1 – VISITOR ARRIVALS**

	Air Visitors by Country of Origin						Cruise & Air Visitors
	Cruise Passengers	U.S.A.	Canada	U.K.	Other	Total <sup>(1)</sup>	
<b>2010</b>							
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
<b>Year</b>	<b>347,931</b>	<b>166,016</b>	<b>30,402</b>	<b>23,240</b>	<b>12,604</b>	<b>232,262</b>	<b>580,193</b>
<b>2011</b>							
1st Qtr	675	19,705	6,469	2,983	1,667	30,824	31,499
2nd Qtr	161,036	61,232	9,027	6,371	3,832	80,462	241,498
3rd Qtr	187,240	61,651	6,722	7,348	4,196	79,917	267,157
4th Qtr	66,760	30,302	6,999	4,822	2,712	44,835	111,595
<b>Year</b>	<b>415,711</b>	<b>172,890</b>	<b>29,217</b>	<b>21,524</b>	<b>12,407</b>	<b>236,038</b>	<b>651,749</b>
<b>2012</b>							
1st Qtr	2,719	19,787	7,292	2,872	1,668	31,619	34,338
2nd Qtr	161,351	56,447	8,859	5,924	3,956	75,186	236,537
3rd Qtr	179,124	61,853	7,636	7,174	4,189	80,852	259,976
4th Qtr	35,068	30,091	6,778	5,059	2,478	44,406	79,474
<b>Year</b>	<b>378,262</b>	<b>168,178</b>	<b>30,565</b>	<b>21,029</b>	<b>12,291</b>	<b>232,063</b>	<b>610,325</b>
<b>2013</b>							
1st Qtr	1,484	19,992	6,273	3,260	1,775	31,300	32,784

1. Excludes ship and yacht visitors

Source: Tourism Department

## Overseas Spending by Residents

Overseas spending by residents remained static at \$11.5 million during the first quarter of 2013. Clothing and footwear purchases, representing 46.8 per cent of total overseas purchases, increased 1.4 per cent to \$5.4 million. Spending on electronic and photographic equipment reflected the largest absolute increase of \$179,000 year-over-year. Outlays on jewellery and watches and computer, hardware and software increased by \$112,000 and \$96,000, respectively. Spending levels for tools, machinery and parts rose \$13,000 when compared to the first quarter of 2012.

In the remaining commodity groups, residents declared fewer purchases of: miscellaneous items (-\$303,000); tapes and compact discs (-\$78,000); toys and sports goods (-\$64,000); and, household, furniture and appliances (-\$32,000).

## Retail Sales

Retail sales for the first quarter of 2013 recorded a fractional rise of 0.1 per cent over the same quarter in 2012. Sales for the month of January 2013 increased 3.1 per cent year-over-year. However, this higher level of sales was offset by declines in retail sales turnover during the months of February and March of 1.8 per cent and 1.0 per cent, respectively.

Among the seven retail sectors, building material stores experienced the largest decrease in sales activity of 19.5 per cent. This was due to weaker demand for building supplies reflecting fewer construction projects. All other store types, including pharmacies, tourist related stores and furniture stores experienced a decrease of 3.6 per cent in combined sales. Motor vehicle dealers registered a dip in sales of 3.5 per cent, reflecting fewer vehicles sold. Consumer demand for apparel declined fractionally by 0.5 per cent, while service stations recorded no sales growth year-over-year. Food stores and liquor stores registered higher sales during the quarter of 6.1 per cent and 1.6 per cent, respectively.

TABLE 2 – VISITORS BY INTENDED TYPE OF ACCOMMODATION

	Resort Hotels	Small Hotels, Cottage Colonies & Clubs	Housekeeping Accommodations <sup>(3)</sup>	Guest Houses <sup>(4)</sup>	Private Homes <sup>(1)</sup>	Not Stated	Total <sup>(2)</sup>
<b>2010</b>							
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
<b>Year</b>	<b>104,523</b>	<b>57,488</b>	<b>7,121</b>	<b>2,067</b>	<b>59,149</b>	<b>1,914</b>	<b>232,262</b>
<b>2011</b>							
1st Qtr	15,395	7,037	1,006	330	6,882	174	30,824
2nd Qtr	38,072	20,188	2,572	685	18,184	761	80,462
3rd Qtr	35,363	21,164	2,064	646	20,129	551	79,917
4th Qtr	19,745	11,538	1,220	335	11,744	253	44,835
<b>Year</b>	<b>108,575</b>	<b>59,927</b>	<b>6,862</b>	<b>1,996</b>	<b>56,939</b>	<b>1,739</b>	<b>236,038</b>
<b>2012</b>							
1st Qtr	15,532	7,457	841	216	7,452	121	31,619
2nd Qtr	34,239	19,541	2,341	464	17,936	665	75,186
3rd Qtr	37,750	20,432	1,780	514	19,842	534	80,852
4th Qtr	19,729	11,745	1,080	354	11,259	239	44,406
<b>Year</b>	<b>107,250</b>	<b>59,175</b>	<b>6,042</b>	<b>1,548</b>	<b>56,489</b>	<b>1,559</b>	<b>232,063</b>
<b>2013</b>							
1st Qtr	14,748	7,475	956	248	7,700	173	31,300

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

Source: Tourism Department

2. Excludes cruise visitors. 3. Includes Cottage Suites/Apt. and Inns 4. Includes Bed & Breakfast

## Hotel Gross Receipts

In the first quarter of 2013, hotel gross receipts grew \$1.1 million to \$33.3 million. Resort hotels recorded \$30.0 million in revenue on the strength of increased food sales. Small hotels, cottage colonies and other tourist accommodations also reported higher sales revenue of 29.3 per cent, 6.8 per cent and 1.5 per cent respectively.

Revenue earned from hotel room sales was 1.6 per cent higher compared to the first quarter of 2012 but still accounted for half of total hotel gross receipts. Alcohol sales and food sales increased by 12.4 per cent and 3.5 per cent, respectively.



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

	Air Visitors			Cruise Visitors	Total Expenditure <sup>(2)</sup>
	Accommodation and Food	Shopping, Entertainment, Transport, etc.	Total <sup>(1)</sup>		
<b>2010</b>					
1st Qtr	23.8	6.5	30.3	0.2	30.5
2nd Qtr	94.6	22.4	117.0	30.8	147.8
3rd Qtr	90.2	22.9	113.1	26.8	139.9
4th Qtr	48.7	13.8	62.5	4.8	67.3
<b>Year</b>	<b>257.3</b>	<b>65.6</b>	<b>322.9</b>	<b>62.6</b>	<b>385.5</b>
<b>2011</b>					
1st Qtr	29.8	10.0	39.8	0.1	39.9
2nd Qtr	101.2	25.7	126.9	33.5	160.4
3rd Qtr	97.3	23.7	121.0	38.9	159.9
4th Qtr	45.2	15.6	60.8	13.8	74.6
<b>Year</b>	<b>273.5</b>	<b>75.0</b>	<b>348.5</b>	<b>86.3</b>	<b>434.8</b>
<b>2012</b>					
1st Qtr	26.5	8.6	35.1	0.6	35.7
2nd Qtr	76.8	22.5	99.3	34.2	133.5
3rd Qtr	94.3	24.9	119.2	37.9	157.1
4th Qtr	44.0	14.4	58.4	7.4	65.8
<b>Year</b>	<b>241.6</b>	<b>70.4</b>	<b>312.0</b>	<b>80.1</b>	<b>392.1</b>
<b>2013</b>					
1st Qtr	24.2	9.6	33.8	0.3	34.1

1. Air visitors subtotals are not comparable prior to 2004. 2. Estimates for air and cruise expenditure includes departure tax.

Source: Department of Statistics

Other sales, which includes revenue earned from news-stands, gift shops, pro-shops, green fees, marinas, and banquets hall rentals, rose by 4.7 per cent.

### Hotel Employment

There were 2,375 workers employed in the hotel industry at the end of January 2013. This level of employment represented an increase of 48 employees in the industry compared to the same period in 2012. Total employment within resort hotels experienced the largest growth, increasing by 36 employees. Cottage colonies and

housekeeping units employed 12 more workers. Employment within guesthouses and micro-units remained static with 17 workers.

Major resort hotels remained the largest employer in the accommodations industry, employing 1,979 workers or 83.3 per cent of the industry total. Cottage colonies and housekeeping units employed 16.0 per cent of the hotel industry workforce, representing 379 workers. Guesthouses and micro-units continued to employ less than 1 per cent of workers in the industry.

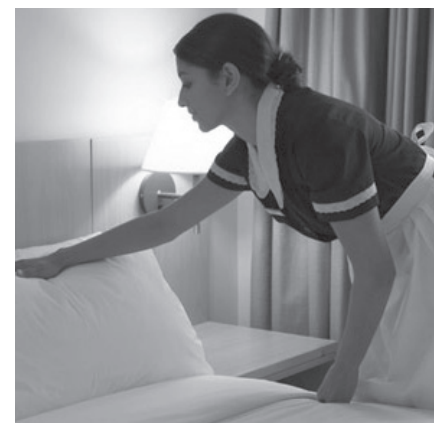


TABLE 4 – EMPLOYMENT IN HOTEL INDUSTRY BY TYPE OF ESTABLISHMENT <sup>(1)</sup>

		Hotels	Cottage Colonies & Housekeeping	Guest Houses & Micro-Units <sup>(2)</sup>	All Establishments
<b>2010</b>					
1st Qtr	January	1,866	418	19	2,303
2nd Qtr	April	1,952	464	19	2,435
3rd Qtr	July	2,027	519	19	2,565
4th Qtr	October	1,972	480	17	2,469
<b>2011</b>					
1st Qtr	January	1,895	385	17	2,297
2nd Qtr	April	2,031	402	13	2,446
3rd Qtr	July	2,192	440	17	2,649
4th Qtr	October	2,168	395	18	2,581
<b>2012</b>					
1st Qtr	January	1,943	367	17	2,327
2nd Qtr	April	2,026	409	19	2,454
3rd Qtr	July	2,123	437	19	2,579
4th Qtr	October	2,036	428	15	2,479
<b>2013</b>					
1st Qtr	January	1,979	379	17	2,375

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 <sup>(1)</sup>**

	Total	Food Stores	Liquor Stores	Motor Vehicle Dealers	Service Stations	Building Materials	Apparel Stores	All Other Store Types
<b>2010</b>								
1st Qtr	90.2	113.7	98.2	80.2	104.7	66.6	58.5	83.5
2nd Qtr	99.1	120.9	108.9	66.2	118.0	70.4	95.6	99.1
3rd Qtr	97.6	124.8	131.0	61.4	114.4	66.5	79.6	95.5
4th Qtr	102.2	122.5	124.1	64.8	109.0	53.8	116.7	104.4
<b>Year</b>	<b>97.3</b>	<b>120.5</b>	<b>115.6</b>	<b>68.2</b>	<b>111.5</b>	<b>64.3</b>	<b>87.6</b>	<b>95.6</b>
<b>2011</b>								
1st Qtr	85.3	111.1	92.8	62.1	106.4	56.5	58.0	80.7
2nd Qtr	96.7	121.0	108.1	55.7	124.4	66.0	95.9	94.7
3rd Qtr	95.8	122.8	128.1	47.5	122.9	67.1	85.1	93.0
4th Qtr	100.1	124.6	125.6	38.9	110.8	64.5	116.7	101.1
<b>Year</b>	<b>94.5</b>	<b>119.9</b>	<b>113.7</b>	<b>51.1</b>	<b>116.1</b>	<b>63.5</b>	<b>88.9</b>	<b>92.4</b>
<b>2012</b>								
1st Qtr <sup>R</sup>	85.3	117.2	101.8	42.9	107.9	61.1	57.3	80.0
2nd Qtr	95.6	123.3	111.9	42.4	119.1	63.6	90.4	93.9
3rd Qtr	97.7	133.0	146.1	48.4	120.4	57.9	82.2	91.5
4th Qtr	99.7	132.9	131.8	44.4	115.0	46.1	110.5	96.1
<b>Year</b>	<b>94.6</b>	<b>126.6</b>	<b>122.9</b>	<b>44.5</b>	<b>115.6</b>	<b>57.2</b>	<b>85.1</b>	<b>90.4</b>
<b>2013</b>								
1st Qtr	85.4	124.3	103.4	41.4	107.9	49.2	57.0	77.1

1. Quarterly averages derived from monthly series

Source: Department of Statistics



Table 6 – Resident Purchases Abroad <sup>(1)</sup> – \$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
<b>2010</b>										
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
<b>Year</b>	<b>35,065</b>	<b>5,982</b>	<b>2,541</b>	<b>2,918</b>	<b>1,849</b>	<b>3,488</b>	<b>2,219</b>	<b>1,032</b>	<b>16,422</b>	<b>71,516</b>
<b>2011</b>										
1st Qtr	5,827	1,181	479	564	312	692	422	230	3,222	12,929
2nd Qtr	9,007	1,344	518	637	296	801	495	240	4,077	17,415
3rd Qtr	8,760	1,557	595	707	344	1,019	555	274	4,715	18,526
4th Qtr	8,386	1,616	555	877	394	822	575	231	4,283	17,739
<b>Year</b>	<b>31,980</b>	<b>5,698</b>	<b>2,147</b>	<b>2,785</b>	<b>1,346</b>	<b>3,334</b>	<b>2,047</b>	<b>975</b>	<b>16,297</b>	<b>66,609</b>
<b>2012</b>										
1st Qtr	5,303	1,032	364	491	232	463	329	184	3,095	11,493
2nd Qtr	8,859	1,369	407	585	216	627	408	232	3,927	16,630
3rd Qtr	8,800	1,384	423	675	245	679	484	238	4,728	17,656
4th Qtr	9,189	2,012	472	930	307	868	605	230	4,560	19,173
<b>Year</b>	<b>32,151</b>	<b>5,797</b>	<b>1,666</b>	<b>2,681</b>	<b>1,000</b>	<b>2,637</b>	<b>1,826</b>	<b>884</b>	<b>16,310</b>	<b>64,952</b>
<b>2013</b>										
1st Qtr	5,379	1,211	332	427	154	559	441	197	2,792	11,492

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
<b>2010</b>					
1st Qtr	20,885	1,063	779	428	23,155
2nd Qtr	61,389	5,895	1,517	569	69,370
3rd Qtr	60,562	6,517	1,559	589	69,227
4th Qtr	37,410	2,232	1,052	515	41,209
Year	180,246	15,707	4,907	2,101	202,961
<b>2011</b>					
1st Qtr	23,621	849	922	510	25,902
2nd Qtr	68,686	4,903	1,387	733	75,709
3rd Qtr	76,325	6,073	1,503	616	84,517
4th Qtr	38,360	1,857	1,004	511	41,732
Year	206,992	13,682	4,816	2,370	227,860
<b>2012</b>					
1st Qtr <sup>R</sup>	29,264	820	1,721	350	32,155
2nd Qtr	61,858	4,841	1,266	478	68,443
3rd Qtr	70,886	5,968	1,119	475	78,448
4th Qtr	37,107	2,601	834	401	40,943
Year	199,115	14,230	4,940	1,704	219,989
<b>2013</b>					
1st Qtr	30,022	1,061	1,839	355	33,277

Source: Department of Statistics

### 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 2010 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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