



Quarterly Bulletin of Statistics

Q2 2012 Highlights

Air Arrivals:

Bermuda hosted 75,186 tourists.

Tourist Accommodations:

Hotel Gross Receipts amounted to \$68.4 million.

Hotel Employment:

The Hotel Industry employed 2,454 workers.

Overseas Spending:

Consumers declared overseas purchases of \$16.6 million.

Retail:

Gross turnover in the retail sector reached \$256.5 million.

Visitors Arrivals and Expenditure:

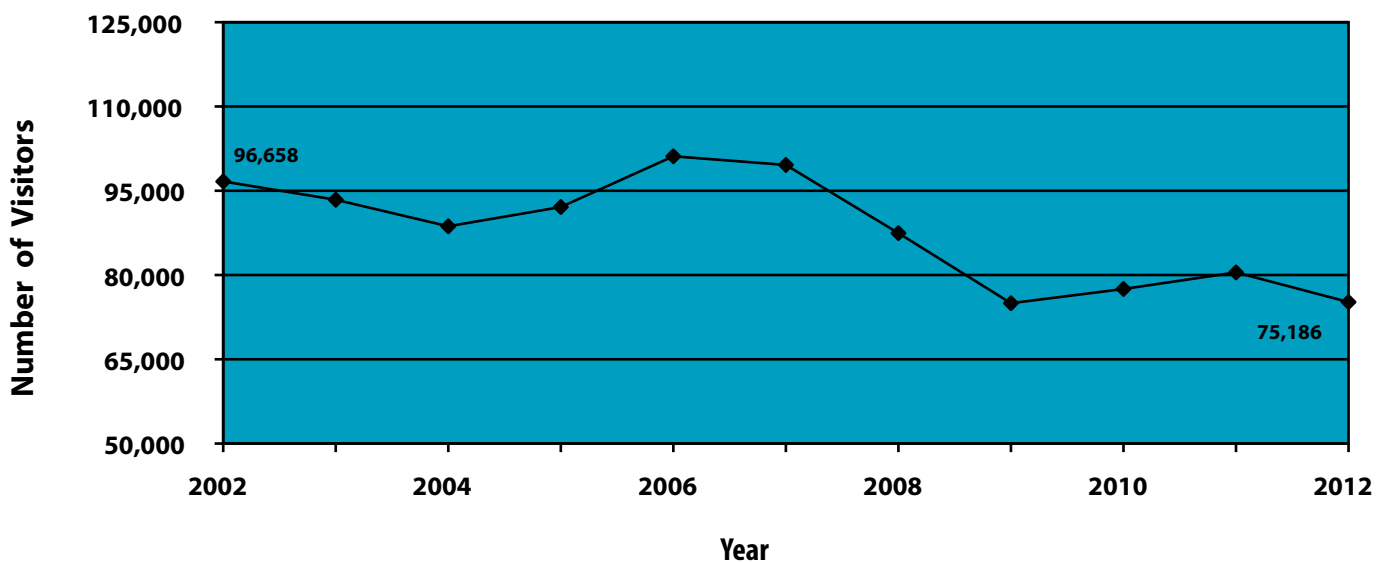
Air Arrivals

Air arrivals during the second quarter of 2012 fell by 6.6 per cent when compared to the same quarter of 2011. A total of 75,186 visitors arrived by air to the Island, down from the 80,462 that visited in 2011. This decrease was attributed to a 12 per cent decline in business travellers and a 13 per cent decline in leisure travellers.

Arrivals from the United States, Bermuda's largest tourist market, decreased 7.8 per cent when compared to the second quarter of 2011. A total of 56,447 U.S. visitors travelled to the Island compared with 61,232 visitors in the same period of 2011. Fewer air arrivals were recorded from the United Kingdom (-7.0 per cent) and from Canada (-1.9 per cent) during the quarter. In contrast, arrivals from all other countries were up by 3.2 per cent.

The decline in air arrivals resulted in a 6.6 per cent drop in bookings at tourist accommodations. Guest houses registered the strongest decrease, falling 32.3 per cent. Occupancy at resort hotels fell by 10.1 per cent while visitors staying at housekeeping accommodations also declined by 9.0 per cent. The number of guests staying at small hotels & cottage colonies and private homes declined by 3.2 per cent and 1.4 per cent, respectively.

2nd Quarter Air Arrivals



Expenditure by Air Arrivals

During the second quarter of 2012, expenditure by air visitors contracted by \$27.6 million to \$99.3 million. The weak expenditure reflected the overall drop in air arrivals during the quarter as experienced by each type of tourist accommodation. Collectively, the spending level for all categories of visitor expenditure for air arrivals fell 21.7 per cent during the quarter.

Cruise Arrivals and Expenditure

Cruise ship arrivals during the second quarter of 2012 increased fractionally by 0.2 per cent. A total of 161,351 cruise passengers travelled to Bermuda during the second quarter of 2012. There were 161,036 cruise visitors in 2011.

Cruise ship passengers spent an estimated \$34.2 million while visiting the Island, \$0.7 million more than in the same quarter of 2011.

Hotel Gross Receipts

Hotel Gross Receipts totaled \$68.4 million in the second quarter of 2012. Sales revenue for resort hotels dipped \$6.8 million or by nearly 10 per cent. Similarly, sales revenue for cottage colonies and smaller hotels recorded declines in gross receipts of \$121,000 and \$62,000, respectively.

Sales receipts for food purchased on tourist properties declined \$3.4 million or 17.7 per cent. Revenue earned from room occupancy sales fell \$2.8 million or 6.5 per cent. Other hotel department sales declined by \$0.5 million or 3.7 per cent. Alcohol sales were also lower by \$0.6 million or 9.4 per cent compared to the same quarter in 2011.

Hotel Employment

There were 2,454 workers employed within the hotel industry at the end of April 2012, increasing by 8 workers when compared to the previous year. Employment in the major hotels represented 83 per cent

of the hotel industry employment. A total of 2,026 workers were employed, at these establishments, 5 less workers when compared to the same quarter of 2011. Employment at cottage colonies & housekeeping increased by 7 workers to 409 workers, while the number of workers at guest houses and smaller tourist properties increased to 19 workers.

Overseas Spending by Residents

Travelling residents declared \$16.6 million worth of goods during the second quarter of 2012. Total spending was 4.5 per cent lower than the value of overseas purchases declared during the same quarter of 2011. Expenditures on all commodity groupings contracted with the exception of electronic and photographic equipment which increased 1.9 per cent. Outlays on clothing & footwear continued to represent the largest portion of purchases, although residents declared 1.6 per cent or close to \$150,000 less for this grouping.



TABLE 1 – VISITOR ARRIVALS

Air Visitors by Country of Origin							Cruise & Air Visitors
Cruise Passengers	U.S.A.	Canada	U.K.	Other	Total ⁽¹⁾		
2009							
1st Qtr	0	21,549	4,989	3,468	2,229	32,235	32,235
2nd Qtr	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
2nd Qtr	161,036	61,232	9,027	6,371	3,832	80,462	241,498
3rd Qtr	187,487	61,651	6,722	7,348	4,196	79,917	267,404
4th Qtr	66,513	30,302	6,999	4,822	2,712	44,835	111,348
Year	415,711	172,890	29,217	21,524	12,407	236,038	651,749
2012							
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

1. Excludes ship and yacht visitors

Source: Tourism Department

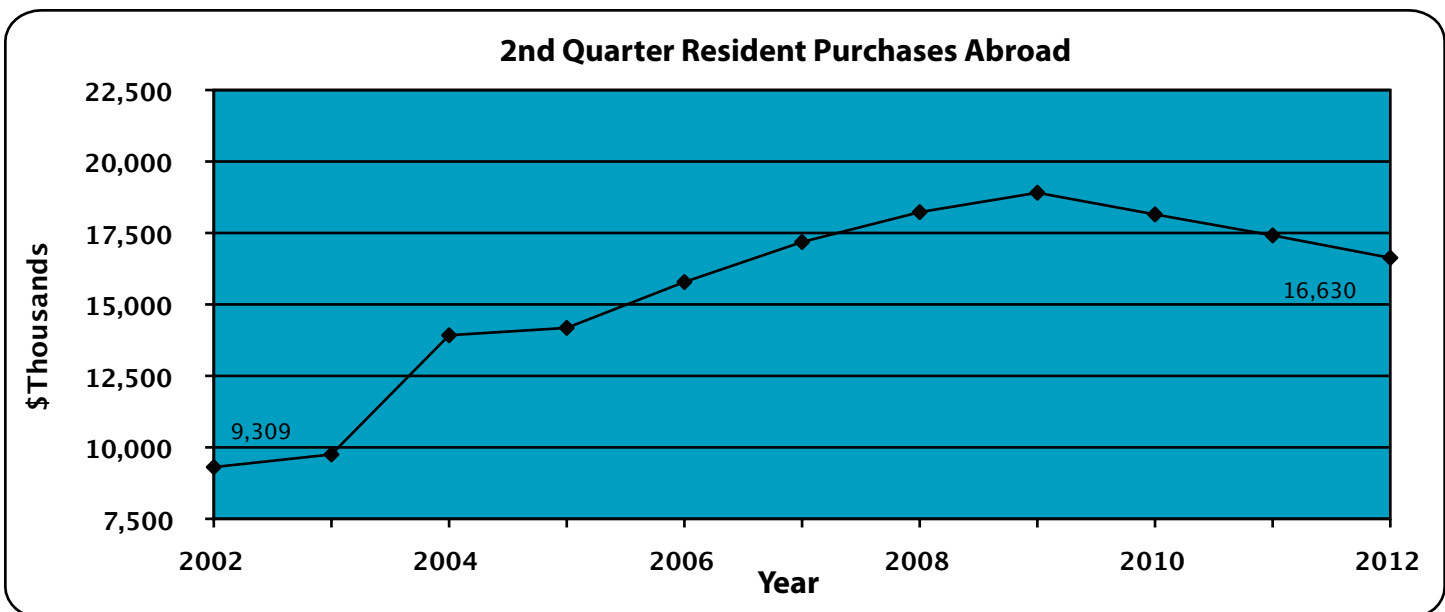


TABLE 2 – VISITORS BY INTENDED TYPE OF ACCOMMODATION

	Resort Hotels	Small Hotels, Cottage Colonies & Clubs	Housekeeping Accommodations ⁽³⁾	Guest Houses ⁽⁴⁾	Private Homes ⁽¹⁾	Not Stated	Total ⁽²⁾
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
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
Year	108,575	59,927	6,862	1,996	56,939	1,739	236,038
2012							
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

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

Among the other commodity groupings, spending levels contracted for purchases of tapes and compact discs (-27.0 per cent), computer hardware & software (-21.7 per cent), household items, furniture and appliances (-21.4 per cent), jewellery and watches (-17.6 per cent), toys and sports goods (-8.2 per cent), miscellaneous items (-3.7 per cent), and tools, machinery and parts (-3.3 per cent).

Retail Sales

Retail sales fell 1.1 per cent during the second quarter of 2012. A total of \$256.5 million in retail goods was sold during the period compared to \$259.6 million in 2011. Motor vehicles sales fell by 23.9 per cent. Although the volume of motor vehicles sold by auto dealers increased, the value of sales fell below the previous years level as consumers opted to purchase

motorcycles instead of private cars. Retail sales receipts for apparel stores decreased 5.7 per cent. Service stations recorded a decline in sales of 4.3 per cent while retailers of building materials experienced a 3.6 per cent dip in gross receipts, during the quarter.

In contrast, sales revenue for liquor stores and food stores increased 9.2 per cent and 1.9 per cent, respectively.

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⁾		
2009					
1st Qtr	22.5	7.2	29.7	0.0	29.7
2nd Qtr	66.2	20.5	86.7	21.4	108.1
3rd Qtr	74.8	20.2	95.0	24.4	119.4
4th Qtr	43.1	11.9	55.0	9.0	64.0
Year	206.6	59.8	266.4	54.8	321.2
2010					
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
Year	257.3	65.6	322.9	62.6	385.5
2011					
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	39.0	160.0
4th Qtr	45.2	15.6	60.8	13.8	74.6
Year	273.5	75.0	348.5	86.4	434.9
2012					
1st Qtr	26.5	8.6	35.1	0.6	35.7
2nd Qtr	76.8	22.5	99.3	34.2	133.5

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

Source: Department of Statistics



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

	Hotels	Cottage Colonies and Housekeeping	Guest Houses and Micro-Units ⁽²⁾	All Establishments
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	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
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
Year				
2012				
1st Qtr January	1,943	367	17	2,327
2nd Qtr April	2,026	409	19	2,454

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
2009								
1st Qtr	92.9	110.6	81.3	80.9	93.8	83.6	62.4	91.9
2nd Qtr	103.4	121.2	107.6	83.9	109.4	95.2	92.9	101.0
3rd Qtr	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	102.2	119.9	112.8	82.0	106.0	86.1	89.7	100.3
2010								
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
Year	97.3	120.3	115.6	68.2	111.5	64.3	87.6	95.6
2011								
1st Qtr	85.3	111.1	92.8	62.1	106.4	56.5	58.0	80.5
2nd Qtr ^R	96.7	121.0	108.1	55.7	124.4	66.0	95.9	94.7
3rd Qtr	95.8	122.8	128.1	47.7	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
Year ^R	94.5	120.3	113.7	51.2	116.1	63.6	88.7	92.3
2012								
1st Qtr	86.3	118.0	102.1	48.0	107.7	61.1	57.1	80.3
2nd Qtr	95.6	123.3	118.0	42.4	119.1	63.6	90.4	93.9

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
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
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
Year	31,980	5,698	2,147	2,785	1,346	3,334	2,047	975	16,297	66,609
2012										
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

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
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	61,389	5,895	1,517	569	69,370
3rd Qtr ^R	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
2011					
1st Qtr ^R	23,621	849	922	510	25,902
2nd Qtr ^R	68,686	4,903	1,387	733	75,709
3rd Qtr	74,865	6,073	1,503	572	83,013
4th Qtr	35,453	1,857	1,055	511	38,876
Year	202,625	13,682	4,867	2,326	223,500
2012					
1st Qtr ^R	22,942	809	698	359	24,808
2nd Qtr	61,858	4,841	1,266	478	68,443

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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