



Quarterly Bulletin of Statistics

Q2 2013 Highlights

Air Arrivals:

Bermuda hosted 75,013 tourists.

Tourist Accommodations:

Hotel Gross Receipts amounted to \$87 million.

Hotel Employment:

The Hotel Industry employed 2,373 workers.

Overseas Declarations:

Residents declared overseas purchases of \$15.4 million.

Retail:

Gross turnover in the retail sector reached \$258.1 million.

Visitors Arrivals and Expenditure:

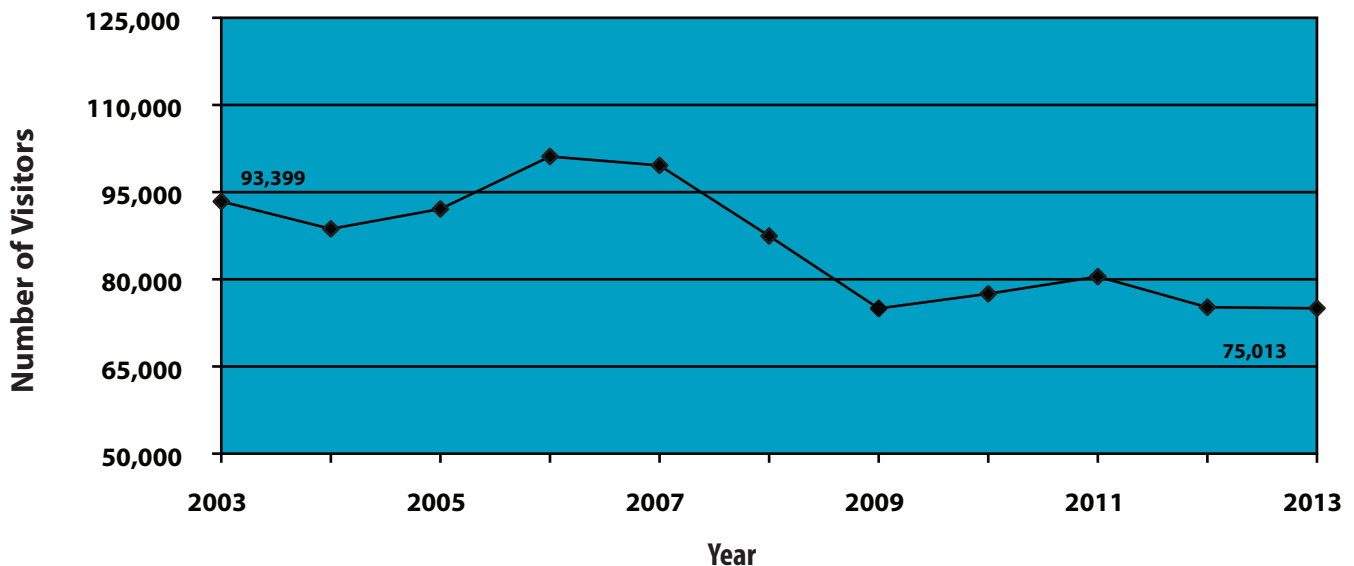
Air Arrivals

Air arrivals during the second quarter of 2013 slipped a fractional 0.2 per cent when compared to the same quarter of 2012. A total of 75,013 visitors arrived by air to the Island, down from the 75,186 air arrivals in 2012.

Visitors from Canada decreased 9.4 per cent due in part to Air Canada reducing its daily service to the Island from Toronto. In contrast, arrivals from the United States, Bermuda's largest tourist market increased 0.6 per cent and visitors from the United Kingdom rose 8.1 per cent when compared to the same period of 2012. Air arrivals from all other countries declined 4.6 per cent.

The decline in second quarter bookings for tourist accommodations directly reflected the fractional dip of 0.2 per cent in air arrivals. This resulted in a decline of 261 guests at housekeeping accommodations while small hotels, cottage colonies and clubs experienced 81 fewer guests year-over-year. In contrast, the number of visitors staying in resort hotels and guest houses rose by 818 guests and 63 guests, respectively.

2nd Quarter Air Arrivals





Expenditure by Air Arrivals

During the second quarter of 2013, air visitor expenditure increased \$3 million to \$102.3 million. Average spending per visitor rose from \$1,295 to \$1,338. This increase was associated with higher spending levels on accommodations and food. In addition, visitor purchases of other tourist-related goods and services such as souvenirs, recreational activities and transportation increased 6.2 per cent during the quarter.

Cruise Arrivals and Expenditure

Cruise ship arrivals fell a strong 17.2 per cent due primarily to 22 fewer cruise ship visits to the Island. A total of 133,676 cruise passengers disembarked in Bermuda during the quarter. This compared to 161,351 in the same quarter last year. Cruise ship passengers spent an estimated \$28.7 million while visiting the Island, or \$5.5 million less than in the previous year.

Hotel Gross Receipts

Hotel Gross Receipts totaled \$87 million in the second quarter of 2013. Resort hotels, representing 90 per cent of total gross receipts, recorded a rise in overall sales of 1.8 per cent. Small hotels experienced the largest growth in sales revenue of 11.9 per cent. Cottage colonies sales receipts increased 4.2 per cent while other guest accommodations registered a rise in sales revenue of 3.7 per cent.



TABLE 1 – VISITOR ARRIVALS

	Air Visitors by Country of Origin						Cruise & Air Visitors
	Cruise Passengers	U.S.A.	Canada	U.K.	Other	Total ⁽¹⁾	
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	187,240	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
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
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
Year	378,262	168,178	30,565	21,029	12,291	232,063	610,325
2013							
1st Qtr	1,484	19,992	6,273	3,260	1,775	31,300	32,784
2nd Qtr	133,676	56,810	8,022	6,405	3,776	75,013	208,689

1. Excludes ship and yacht visitors

Source: Tourism Department

Revenue earned from room sales equated to \$51.1 million or 58.8 per cent of total hotel gross receipts. This represented a 3.5 per cent increase over the same quarter in 2012. Alcohol sales increased 13.1 per cent. Other sales which include revenue earned from news-stands, gift shops, pro-shops, green fees, marinas, and banquets hall rentals, rose 2.4 per cent. In contrast, sales receipts for food purchased on tourist properties contracted 5 per cent, totaling \$17.3 million for the quarter.

Hotel Employment

Hotel employment fell 3.3 per cent as all hotel industry establishments experienced declines in employment levels. At the end of July 2013, a total of 2,373 workers were employed in the hotel industry. This reflected 81 fewer jobs than the level reached in the same period of 2012.

Overseas Declarations by Residents

Returning residents declared \$15.4 million in goods during the second quarter of 2013. Total declarations

were 7.6 per cent lower than the value of overseas purchases declared during the same quarter of 2012. Declared spending of all commodity groups contracted with the exception of computer hardware and software which fractionally increased 0.3 per cent. Outlays on clothing & footwear totalled \$8.5 million, representing 55.2 per cent of all declarations by residents.

Among the remaining commodity groupings, spending levels contracted for purchases of tapes and compact

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⁾
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
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
Year	107,250	59,175	6,042	1,548	56,489	1,559	232,063
2013							
1st Qtr	14,748	7,475	956	248	7,700	173	31,300
2nd Qtr	35,057	19,460	2,080	527	17,215	674	75,013

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

discs (-34.3 per cent), electronic and photographic equipment (-16.7 per cent), and toys and sports goods (-13.5 per cent). Declines were also recorded for purchases of jewellery and watches (-6.4 per cent); household items, furniture and appliances (-4.2 per cent); and tools, machinery and parts (-3.0 per cent).



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⁾		
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	38.9	159.9
4th Qtr	45.2	15.6	60.8	13.8	74.6
Year	273.5	75.0	348.5	86.3	434.8
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
3rd Qtr	94.3	24.9	119.2	37.9	157.1
4th Qtr	44.0	14.4	58.4	7.4	65.8
Year	241.6	70.4	312.0	80.1	392.1
2013					
1st Qtr	24.2	9.6	33.8	0.3	34.1
2nd Qtr	78.4	23.9	102.3	28.7	131.0

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

Source: Department of Statistics

Retail Sales

Retail sales slipped 0.3 per cent during the second quarter of 2013. A total of \$258.1 million in retail goods were sold during the period compared to \$258.9 million in 2012. Retailers of building materials experienced an 18.4 per cent drop in gross receipts due to a slow down in construction activity. All other store types, including pharmacies, tourist related stores

and furniture stores experienced a decrease of 6.8 per cent in combined sales. Sales revenue for liquor stores decreased 3 per cent while sales receipts for apparel stores dipped 2.7 per cent. Additionally, motor vehicle sales marginally declined 1.8 per cent as fewer vehicles were sold during this period. In contrast, sales revenue for food stores and service stations increased 4.1 per cent and 0.3 per cent, respectively.



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

		Hotels	Cottage Colonies & Housekeeping	Guest Houses & Micro-Units ⁽²⁾	All Establishments
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
2012					
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
2013					
1st Qtr	January	1,979	379	17	2,375
2nd Qtr	April	1,959	397	17	2,373

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⁾

	Total	Food Stores	Liquor Stores	Motor Vehicle Dealers	Service Stations	Building Materials	Apparel Stores	All Other Store Types
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	120.5	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	80.7
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
Year	94.5	119.9	113.7	51.1	116.1	63.5	88.9	92.4
2012								
1st Qtr	85.3	117.2	101.8	42.9	107.9	61.1	57.3	80.0
2nd Qtr ^R	96.4	127.1	114.9	45.4	119.3	63.7	94.0	99.0
3rd Qtr ^R	97.7	133.0	146.1	48.4	120.1	57.9	82.2	91.5
4th Qtr ^R	99.6	132.9	131.8	44.4	114.2	46.1	110.5	96.1
Year	94.8	127.6	123.7	45.3	115.4	57.2	86.0	91.7
2013								
1st Qtr ^R	85.3	124.3	103.4	41.4	107.2	49.2	57.0	77.1
2nd Qtr	96.1	132.3	111.5	44.6	119.7	52.0	91.5	92.3

1. Quarterly averages derived from monthly series

Source: Department of Statistics



Table 6 – Overseas Declarations by Residents⁽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
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
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
Year	32,151	5,797	1,666	2,681	1,000	2,637	1,826	884	16,310	64,952
2013										
1st Qtr	5,379	1,211	332	427	154	559	441	197	2,792	11,492
2nd Qtr	8,480	1,140	390	506	142	629	382	225	3,470	15,364

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

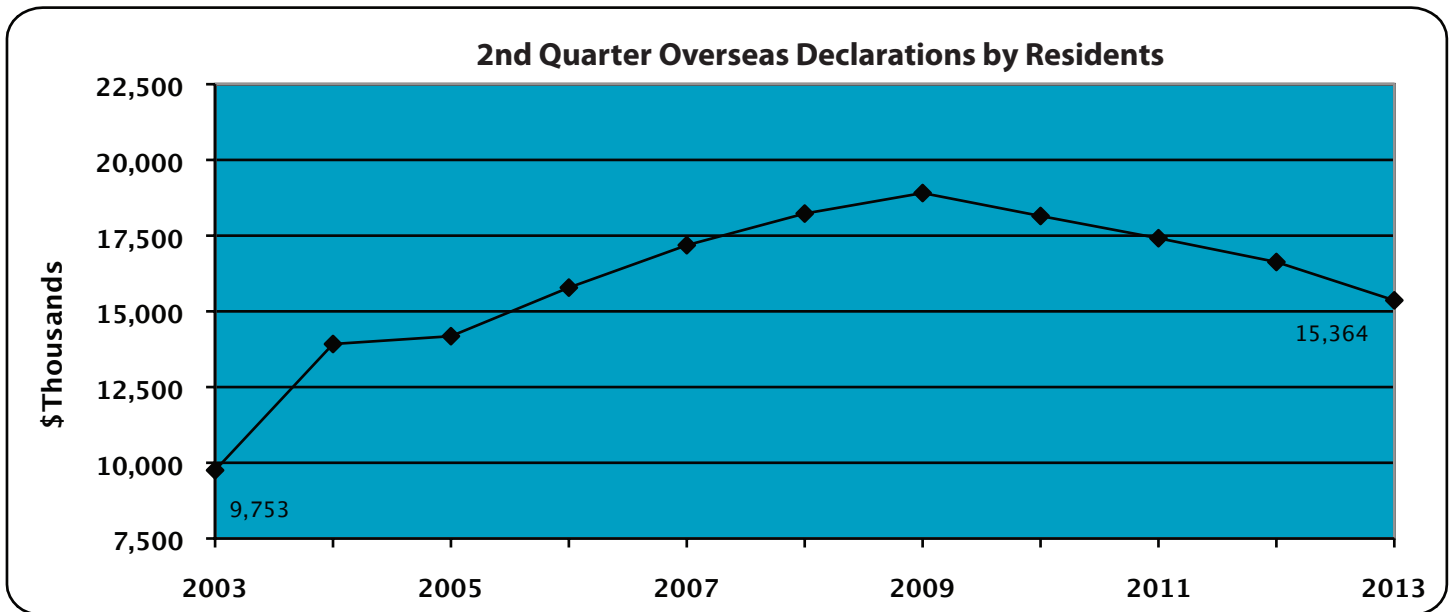


Table 7 – Hotel Gross Receipts – \$000

	Resort Hotels	Small Hotels	Cottage Colonies	Other	Total
2010					
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
2011					
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
2012					
1st Qtr	29,264	820	1,721	350	32,155
2nd Qtr ^R	76,948	4,857	2,523	630	84,958
3rd Qtr	70,886	5,968	1,119	475	78,448
4th Qtr	37,107	2,601	834	401	40,943
Year	214,205	14,246	6,197	1,856	236,504
2013					
1st Qtr	30,022	1,061	1,839	355	33,277
2nd Qtr	78,324	5,436	2,629	653	87,042

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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