



Quarterly Bulletin of Statistics

Q4 2013 Highlights

Air Arrivals:

Bermuda hosted 47,211 tourists.

Tourist Accommodations:

Hotel Gross Receipts amounted to \$51.2 million.

Hotel Employment:

The Hotel Industry employed 2,397 workers.

Overseas Spending:

Residents declared overseas purchases totalling \$17.7 million.

Retail:

Gross turnover in the retail sales sector reached \$269.2 million.

Visitors Arrivals and Expenditure:

Air Arrivals

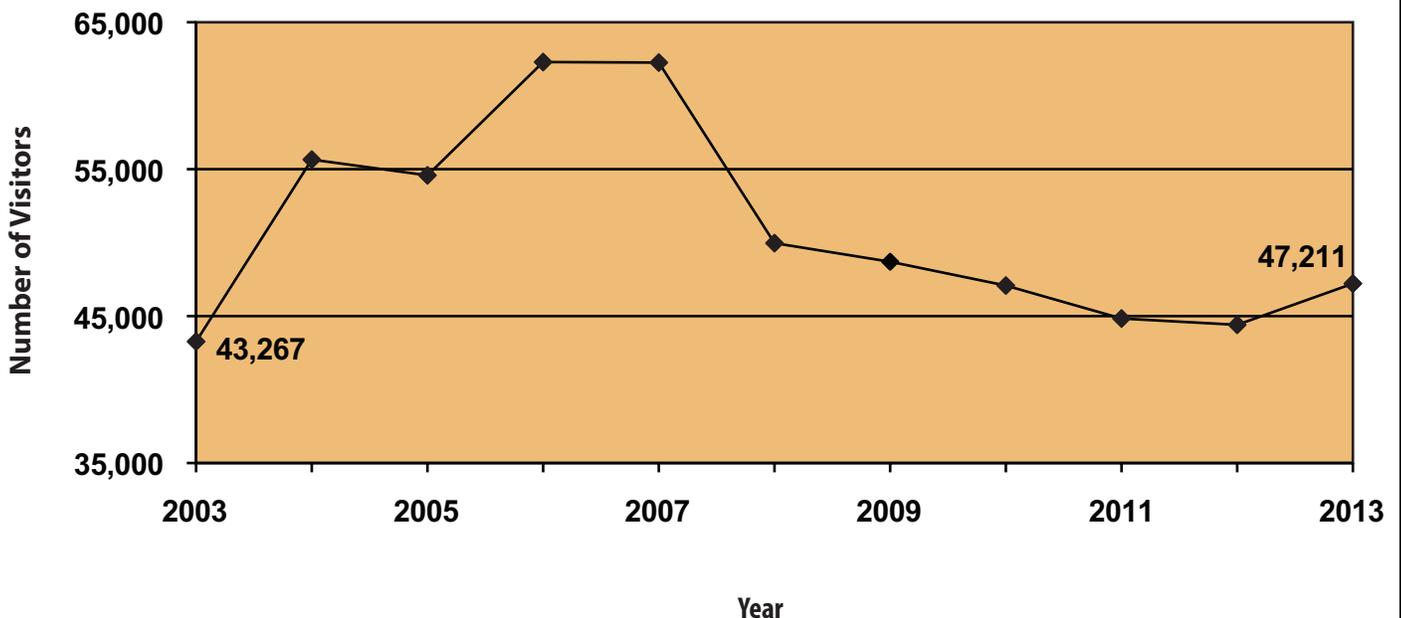
Air arrivals during the fourth quarter of 2013 increased 6.3 per cent when compared to the same quarter of 2012. A total of 47,211 tourists visited the Island, up from 44,406 in 2012. The increase in air visitors was due primarily to heavier air lift from the United States to Bermuda.

Visitors from the United States, Bermuda's largest tourist market, represented more than two-thirds of all visitors. Arrivals from the United States rose 7 per cent to 32,197 visitors year-over-year. Total air travellers grouped in the category for 'Other' countries jumped 24.9 per cent to 3,094 passengers. Arrivals from the United Kingdom increased 5 per cent to 5,310 visitors. In contrast, tourists from Canada declined 2.5 per cent to 6,610 passengers.

The increase in air arrivals for the fourth quarter resulted in a rise in bookings for all tourist accommodation properties. Small hotels, and cottage colonies and clubs recorded the largest increase in bookings, registering 1,274 more guests. Visitors staying in private homes increased by 1,071 guests while occupancy levels at resort hotels rose by 260 persons. In addition, bookings at housekeeping accommodations and guest houses increased by 121 and 38 guests, respectively.

During 2013, air arrivals for the entire year increased by 1.8 per cent to 236,343 passengers. All tourist properties experienced year-on-year increases in visitors with the exception of resort hotels where total occupancy edged down 0.4 per cent from 2012.

4th Quarter Air Arrivals





Expenditure by Air Arrivals

The 6.3 per cent increase in fourth quarter air passengers translated into a 6 per cent rise in visitor spending. Expenditure by visitors was estimated at \$61.9 million representing a \$3.5 million increase. Visitor spending on shopping, entertainment, transportation and other services such as recreational and leisure activities, reached \$19.2 million, close to \$5 million more than in 2012. In contrast, spending on accommodations and food fell 3 per cent to \$42.7 million. Air visitor expenditure for the year 2013 totalled \$318.2 million, reflecting a \$6.2 million rise above the level of expenditure reported in 2012.

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
3rd Qtr	157,373	62,216	6,708	8,635	5,260	82,819	240,192
4th Qtr	47,497	32,197	6,610	5,310	3,094	47,211	94,708
Year	340,030	171,215	27,613	23,610	13,905	236,343	576,373

1. Excludes ship and yacht visitors

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
3rd Qtr	37,069	20,721	2,022	516	22,178	313	82,819
4th Qtr	19,989	13,019	1,201	392	12,330	280	47,211
Year	106,863	60,675	6,259	1,683	59,423	1,440	236,343

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



Cruise Arrivals & Expenditure

Cruise ship arrivals during the fourth quarter jumped 35.4 per cent to 47,497 passengers compared to the same period in 2012. Cruise visitors spent \$10.1 million on local goods and services, including entertainment, souvenirs, sightseeing, sport activities and transportation. This represented a \$2.7 million increase over the \$7.4 million recorded in the same quarter of 2012.

There were 340,030 cruise ship passengers in 2013 reflecting a decline of 10.1 per

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
3rd Qtr	88.8	31.4	120.2	33.7	153.9
4th Qtr	42.7	19.2	61.9	10.1	72.0
Year	234.1	84.1	318.2	72.8	391.0

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

Source: Department of Statistics



cent year-over-year. Cruise visitors spent a total of \$72.8 million on local goods and services, a decrease of \$7.3 million compared to 2012.

Hotel Gross Receipts

Gross receipts for the hotel industry increased 3.4 per cent to \$51.2 million during the fourth quarter of 2013. The increase in sales revenue for this industry primarily reflected the higher level of air arrivals during the quarter.

Resort hotels recorded a 2.6 per cent growth in sales revenue, representing an increase of \$1.2 million during the quarter. Sales at cottage colonies rose 3.6 per cent while sales revenue at other tourist properties increased 3.2 per cent. In contrast, small hotels experienced a 2.4 per cent decrease in sales.

Total hotel gross receipts in 2013 stood at \$268.3 million, an increase of \$8.9 million when compared to gross receipts in 2012.

Hotel Employment

At the end of October 2013, there were 2,397 workers employed within the hotel industry. Employment levels for all types of establishments in the hotel industry contracted year-over-year. Hotel resorts, which employed 83.4 per cent of the total industry, lowered their staff levels by 37 workers. Cottage colonies and housekeeping units employed 41 fewer workers.

Retail Sales

Retail sales for the fourth quarter of 2013 were estimated at \$269.2 million. This represented a \$1.6 million increase year-over-year. Retailers of motor vehicles

recorded the largest growth in quarterly sales with gross receipts increasing 7.9 per cent during the fourth quarter of 2013. This reflected a higher volume of motor vehicles sold throughout the period. Retail sales for the all other store types sector increased 1.8 per cent while sales of food stores were up 1.1 per cent.

In contrast, service stations and suppliers of building materials both experienced decreases in sales of 4.5 per cent. Liquor store sales slipped 3.3 per cent while apparel store sales experienced a marginal decline of 0.2 per cent.

The annual gross turnover in retail sales during 2013 was measured at \$1.02 billion. This reflected a marginal decline of 0.2 per cent or \$1.6 million in sales receipts when compared to 2012.

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
3rd Qtr	July	2,040	486	17	2,543
4th Qtr	October	1,999	387	11	2,397

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

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	96.3	127.1	114.9	45.4	116.9	63.7	90.5	94.9
3rd Qtr	97.7	133.0	146.1	48.4	120.7	57.7	81.9	91.7
4th Qtr ^R	99.7	133.1	131.8	44.4	114.3	46.2	110.2	95.8
Year	94.8	127.6	123.7	45.3	115.0	57.2	85.0	90.6
2013								
1st Qtr	85.3	124.3	103.4	41.4	107.2	49.2	57.0	77.1
2nd Qtr	96.0	132.3	111.5	44.6	117.6	52.0	91.5	92.3
3rd Qtr	96.8	135.3	144.3	49.2	116.8	49.0	80.5	90.4
4th Qtr	100.3	134.5	127.4	47.9	109.1	44.1	110.0	97.5
Year	94.6	131.6	121.7	45.8	112.7	48.6	84.8	89.3

1. Quarterly averages derived from monthly series

Source: Department of Statistics

The annual decline in retail sales was impacted primarily by the 15 per cent drop in sales revenue reported by suppliers of building materials.

Overseas Declarations

Residents declared \$17.7 million on overseas goods during the fourth quarter of 2013. The total value of goods declared was 7.5 per cent below the level reached in 2012. During the fourth quarter of 2013, declines in overseas spending were recorded in all commodity groupings

with the exception of purchases of tools, machinery and parts which increased marginally. Spending on clothing and footwear, which represented 49 per cent of total overseas purchases, fell by \$0.5 million during the fourth quarter. Outlays for the categories electronic and photographic equipment, and toys and sports goods declined by \$0.2 million and \$0.1 million, respectively.

In the remaining commodity groupings, residents declared fewer purchases of:

tapes and compact discs (-\$97,000); jewellery and watches (-\$90,000); computer hardware and software equipment (-\$27,000) and, household items, furniture & equipment (-\$21,000).

Overall, residents spent a total of \$60.5 million on overseas purchases in 2013. This represented a 6.8 per cent dip in expenditure when compared to the \$64.9 million spent in 2012.

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
3rd Qtr	8,108	1,236	436	561	156	638	488	232	4,077	15,932
4th Qtr	8,712	1,827	451	811	210	841	515	239	4,137	17,743
Year	30,679	5,414	1,609	2,305	662	2,667	1,826	893	14,476	60,531

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

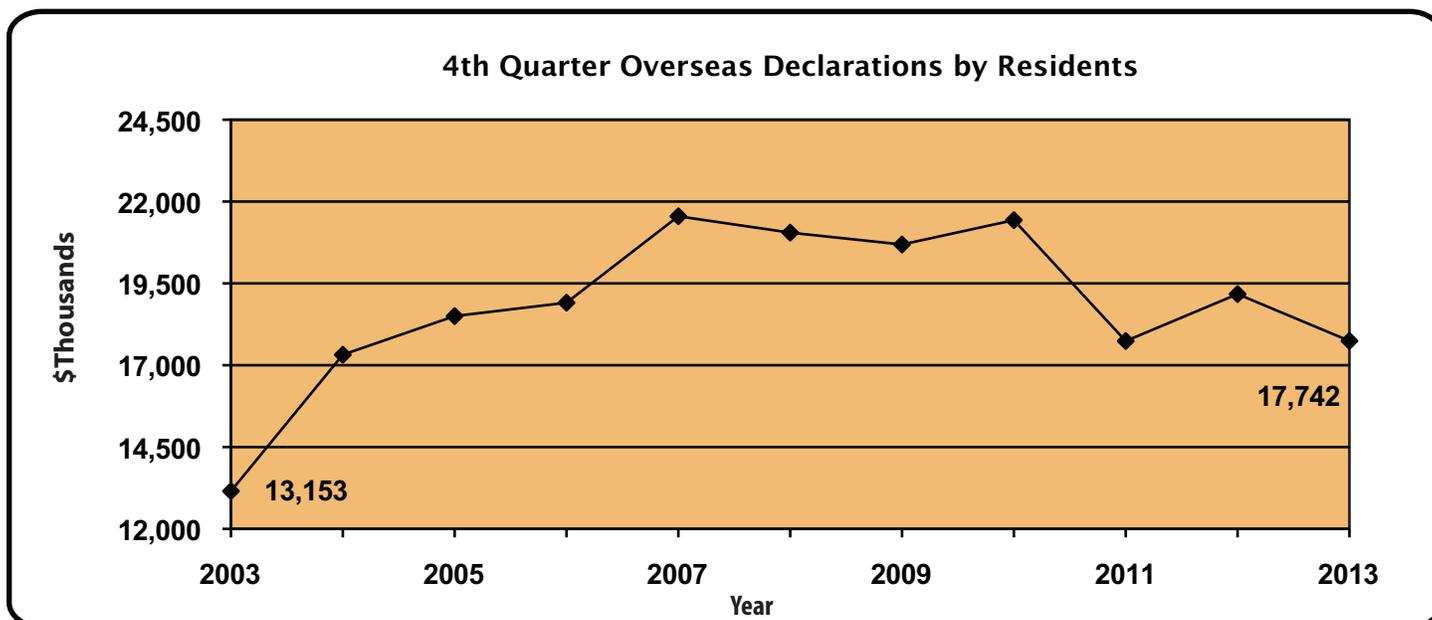


Table 7 – Hotel Gross Receipts – \$000

	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	76,948	4,857	2,523	630	84,958
3rd Qtr ^a	83,313	5,968	2,414	643	92,308
4th Qtr ^a	44,722	2,625	2,038	595	49,980
Year	234,247	14,240	8,696	2,218	259,401
2013					
1st Qtr	30,022	1,061	1,839	355	33,277
2nd Qtr	77,972	5,436	2,652	653	86,713
3rd Qtr ^a	87,892	6,079	2,518	661	97,150
4th Qtr	45,882	2,563	2,112	614	51,171
Year	241,768	15,139	9,121	2,283	268,311

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 2013 Household Expenditure Survey (HES) Report
- Literacy in Bermuda

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