



Quarterly Bulletin of Statistics

Q3 2013 Highlights

Air Arrivals:

Bermuda hosted 82,819 tourists.

Tourist Accommodations:

Gross Hotel Receipts amounted to \$81.2 million.

Hotel industry Employment:

The Hotel Industry employed 2,543 workers

Overseas Declarations:

Residents declared overseas purchases totalling \$15.9 million.

Retail:

Retail sales reached \$259.9 million.

Visitors Arrivals and Expenditure:

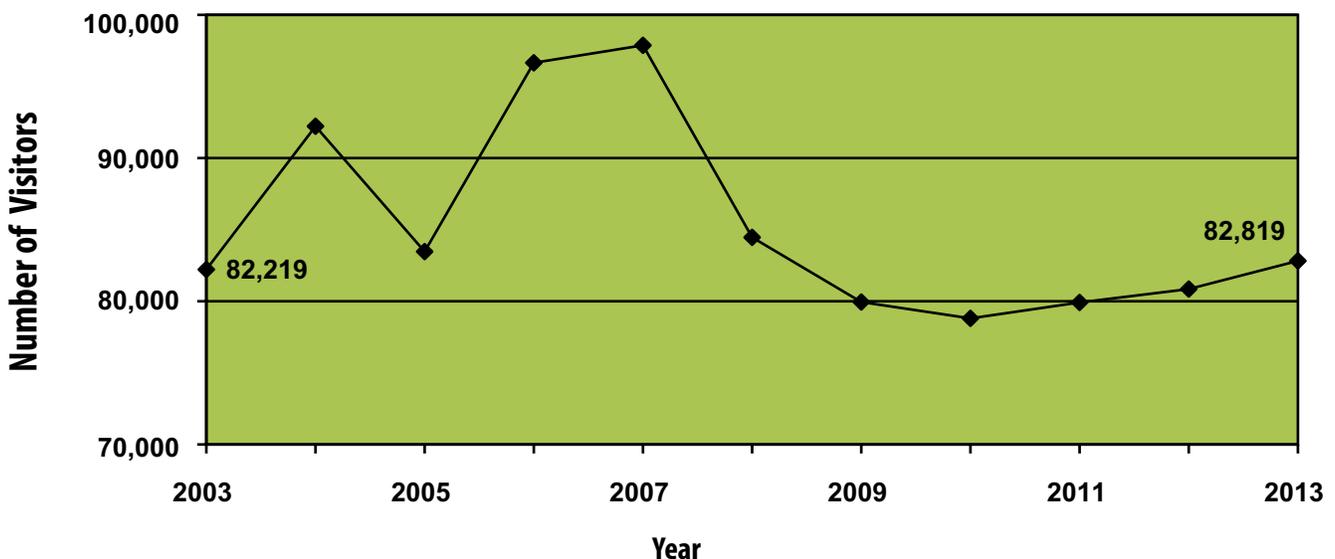
Air Arrivals

During the third quarter of 2013, air arrivals increased 2.4 per cent compared to the same quarter of 2012. A total of 82,819 visitors arrived by air to the Island, up from 80,852 a year ago. The increase in total air visitors was partly attributed to the 20.4 per cent rise or 1,461 more passengers from the United Kingdom. Visitors from all other countries rose 25.6 per cent while arrivals from the United States, Bermuda's largest tourist market, fractionally increased 0.6 per cent compared to the third quarter of 2012.

In contrast, air arrivals from Canada dropped by 12.2 per cent or close to 1,000 fewer visitors. This reflected the reduction in airline flights from the Canadian market.

An analysis of visitors by intended type of accommodation revealed that housekeeping accommodations saw the largest relative increase of 13.6 per cent. The number of guests staying at private homes rose by 11.8 per cent. In absolute terms, this accounted for an increase of over 2,000 visitors lodging at private homes. Visitors staying at the smaller hotels increased 1.4 per cent, while the occupancy level at guest houses fractionally increased 0.4 per cent. In contrast, resort hotels registered a 1.8 per cent dip in reservation bookings.

3rd Quarter Air Arrivals



Expenditure by Air Arrivals

Passengers arriving to the Island by air spent an estimated \$120.2 million during the third quarter of 2013, representing an increase of \$1 million or 0.8 per cent. Visitors reported spending 26.1 per cent more on shopping, entertainment and other services such as recreational and leisure services. This translated to an injection of \$6.5 million. However, expenditure on accommodations and food declined 5.8 per cent.

Cruise Arrivals & Expenditure

During the third quarter of 2013, the number of cruise ship passengers travelling to Bermuda decreased 12.1 per cent to 157,373 passengers. This decline was directly attributed to 20 fewer cruise ship calls at Bermuda's ports compared to the same quarter in 2012.

Expenditure by cruise visitors on local goods and services, including entertainment, souvenirs, sightseeing, sports activities and transportation declined to \$33.7 million. This reflected

an 11.1 per cent fall in spending level or \$4.2 million less year-over-year.

Hotel Gross Receipts

Hotel gross receipts were up \$1.2 million reaching a level of \$81.2 million. Sales revenue earned by resort hotels increased 1.4 per cent to \$72 million, primarily due to a modest increase in room sales. Cottage colonies experienced the largest relative growth in sales revenue of 4.1 per cent. Other guest accommodations registered a 2.8 per cent rise in sales receipts while sales revenue earned by small hotels increased 2.4 per cent.

TABLE 1 – VISITOR ARRIVALS

Air Visitors by Country of Origin							
	Cruise Passengers	U.S.A.	Canada	U.K.	Other	Total ⁽¹⁾	Cruise & Air Visitors
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

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⁾
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

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

Total room occupancy sales for all tourist properties increased \$1.3 million or 2.8 per cent. Alcohol sales rose \$0.6 million or 8.7 per cent. In contrast, other sales revenue earned from news-stands, gift shops, pro-shops, green fees, marinas, and banquet hall rentals contracted 8.5 per cent or by \$0.6 million. Food purchased at all tourist properties slipped 0.2 per cent during the quarter.

Hotel Industry Employment

There were 2,543 workers employed in the hotel industry at the end of July 2013. This represented 36 fewer workers compared

to last year. Major hotel resorts employed 2,040 workers which accounted for 83 fewer employees than the same period in 2012. Employment at guest houses and smaller tourist properties slipped by 2 workers. In contrast, the number of persons employed at cottage colonies and housekeeping units increased by 49 workers.

Overseas Declarations by Residents

Residents declared a total of \$15.9 million for overseas purchases of goods during the third quarter of 2013. The total value

of goods declared was \$1.7 million less than a year ago. Spending on clothing and footwear fell by \$0.7 million to \$8.1 million in the third quarter of 2013. Although the value of purchases for clothing and footwear declined by 7.9 per cent, resident outlays for this spending category accounted for just over half (50.9 per cent) of total overseas purchases.

Outlays on tapes & compact discs dropped 36.3 per cent while expenditure on toys & sports goods and electronic & photographic equipment declined 16.9 per cent and 10.7 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⁾		
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

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

Source: Department of Statistics

Among the other commodity groupings, the value of declarations contracted 6 per cent for computer hardware & software and 2.5 per cent for tools, machinery & parts. In contrast, expenditure on household items, furniture & appliances increased 3.1 per cent and spending on jewellery & watches edged up 0.8 per cent year-over-year.

Retail Sales

Retail sales for the third quarter of 2013 were estimated at \$259.9 million. This represented a decline of \$2.4 million when compared to the third quarter of 2012. All retail sectors recorded lower sales activity with the exception of motor vehicle retailers and food stores. Higher

consumer demand for motor vehicles led to a 1.7 per cent rise in sales receipts for auto dealers. Gross receipts for food stores also increased 1.7 per cent during the quarter.

In contrast, retailers of building materials reported a drop in sales of 15.1 per cent due to the decrease in construction activity compared to last year. Among the remaining retail sectors, sales receipts at service stations declined 3.2 per cent, while sales within apparel stores and all other store types recorded similar declines of 1.7 per cent and 1.5 per cent, respectively. Sales revenue of liquor stores contracted 1.2 per cent.



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

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	96.3	127.1	114.9	45.4	116.9	63.7	90.5	94.9
3rd Qtr ^R	97.7	133.0	146.1	48.4	120.7	57.7	81.9	91.7
4th Qtr	99.6	132.9	131.8	44.4	114.2	46.1	110.5	96.1
Year^R	94.7	127.6	123.7	45.3	114.9	57.2	85.1	90.7
2013								
1st Qtr	85.3	124.3	103.4	41.4	107.2	49.2	57.0	77.1
2nd Qtr ^R	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

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
3rd Qtr	8,108	1,236	436	561	156	638	488	232	4,077	15,932

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

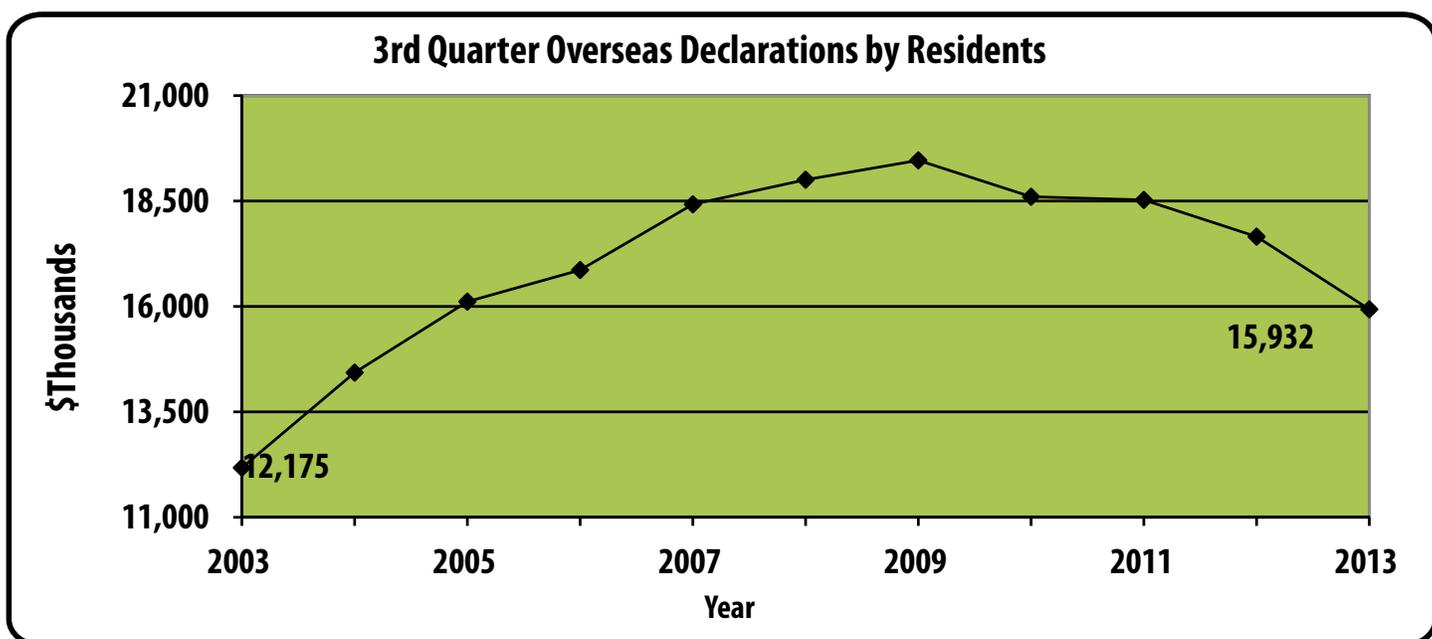


Table 7 – Hotel Gross Receipts – \$000

	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	70,997	5,968	2,414	643	79,992
4th Qtr	37,107	2,601	834	401	40,943
Year	214,316	14,216	7,492	2,024	238,048
2013					
1st Qtr	30,022	1,061	1,839	355	33,277
2nd Qtr ^a	77,972	5,436	2,652	653	86,713
3rd Qtr	71,984	6,079	2,514	661	81,238

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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