

Q1 | 2012



GOVERNMENT OF BERMUDA
Cabinet Office
Department of Statistics

Quarterly Bulletin of Statistics

Q1 2012 Highlights

Air Arrivals:

Bermuda hosted 31,619 tourists

Tourist Accommodations:

Hotel gross receipts amounted to \$26.1 million

Hotel Employment:

The Hotel Industry employed 2,327 workers

Overseas Spending:

Consumers declared overseas purchases of \$11.5 million

Retail:

Gross turnover in the retail sector reached \$231.3 million

Visitors Arrivals and Expenditure:

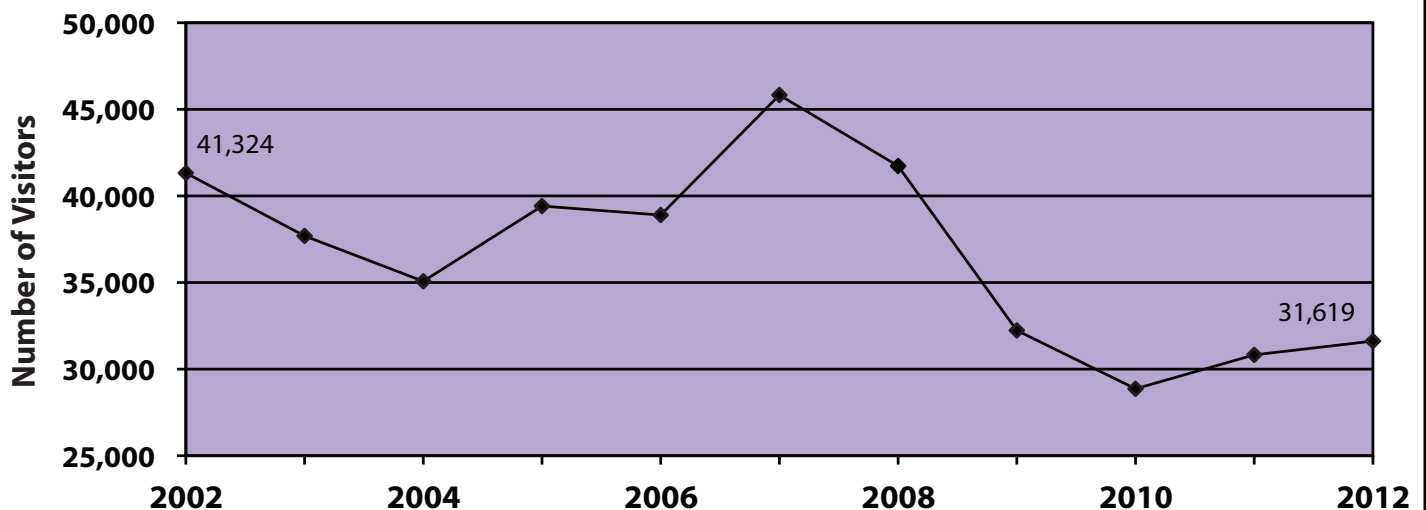
Air Arrivals

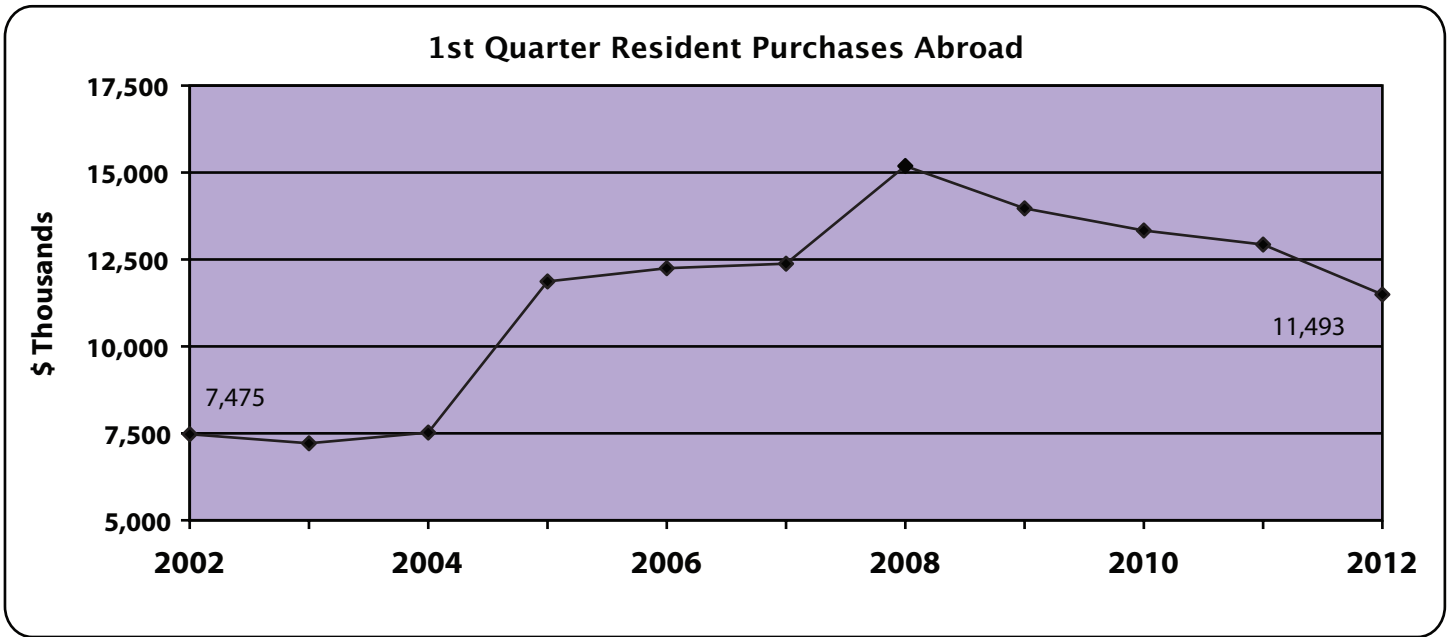
Air arrivals during the first quarter of 2012 increased 2.6 per cent compared to the same quarter in 2011. The Island hosted 31,619 tourists in the first three months of the year, up from 30,824 tourists in 2011. This increase was partly attributed to the spring break activities that took place during the months of February and March, which resulted in a 29 per cent jump in visitors in the 19 years and under age category.

The Canadian market accounted for the largest gain in visitors, increasing 12.7 per cent to 7,292 tourists. Arrivals from the United States, Bermuda's strongest tourist market, increased 0.4 per cent to 19,787 visitors. There were 111 fewer air arrivals from the United Kingdom while visitors from all other countries remained relatively the same.

The growth in first quarter air arrivals translated into increased occupancy levels at the larger tourist accommodation properties. Private homes accommodated 570 more guests compared to a year ago. Small hotels and resort hotels experienced increased occupancy of 420 and 137 guests, respectively. In contrast, the number of visitors staying at housekeeping accommodations and guest houses fell below the levels reached in the previous year.

1st Quarter Air Arrivals





Expenditure by Air Arrivals

Visitor spending declined by \$4.7 million to \$35.1 million in the first quarter of 2012. This represented a 11.8 per cent decrease as a result of lower per capita expenditure by visitors. The average expenditure per air visitor fell from \$1,268 to \$1,083 year-over-year as did the average length of stay from 6.2 nights to 5.9 nights. This resulted in lower spending on tourist activities in Bermuda during the first quarter period. Among the broad expenditure categories, outlays on accommodation and food fell by \$3.3 million. Visitor spending on other activities such as shopping and recreation fell by \$1.4 million. Of these purchases, visitors spent roughly one third less on recreational and leisure activities and 12.6 per cent less on retail goods such as gifts and souvenirs.

Cruise Passenger Arrivals & Expenditure

Three cruise ship liners visited the Island carrying 2,719 passengers in the first quarter of 2012. This surpassed the level reached in 2011 when only one ship visited with 675 passengers. Total expenditure by cruise visitors was estimated at \$0.6 million compared to \$0.1 million for the same quarter of the previous year.



Overseas Spending by Residents

In the first quarter of 2012, overseas spending by residents fell by 11.1 per cent to \$11.5 million. Declines in overseas spending were recorded in all broad commodity groupings during the first quarter representing an aggregate drop in expenditure outlays of \$1.4 million compared to the first quarter in 2011.

Returning residents declared \$5.3 million on clothing and footwear, a decrease of 9.0 per cent year-over-year. Clothing and footwear purchases represented 46.1 per cent of total overseas purchases by residents. Outlays on computer software and hardware, and household furniture and appliances declined by \$229,000 and \$115,000, respectively.

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

TABLE 1 – VISITOR ARRIVALS

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

1. Excludes ship and yacht visitors

Source: Tourism Department

electronic and photographic equipment (-\$149,000); jewellery and watches (-\$93,000); tapes and compact discs (-\$80,000); toys and sporting goods (-\$73,000); and, tools, machinery and parts (-\$46,000).

Retail Sales

Retail sales for the first quarter of 2012 increased 0.9 per cent. This growth reflected a rebound from twelve consecutive quarterly declines in sales experienced since the first quarter 2009. A monthly analysis of sales revealed that the year started with a decline of 2.3 per cent reported in year-over-year sales for January. However, this lower level of sales was offset by a 3.6 per cent rise in sales during the month of February. The quarter

ended on a positive note in March 2012 with sales activity increasing 1.9 per cent.

All retail sectors recorded increased sales revenue with the exception of motor vehicle stores, apparel stores and all other store types. Sales by these sectors declined by 22.7 per cent, 1.6 per cent and 1.1 per cent, respectively.

Sales of building materials and hardware supplies grew 8.1 per cent above the level reached in 2011. This was due to continued demand for construction materials for commercial projects such as the King Edward Memorial Hospital and the Waterloo House development. Retail sales of essential goods such as food and fuel increased by 6.2 per cent and 1.2 per cent, respectively. Sales revenue for liquor

stores jumped 10 per cent compared to the same quarter last year.



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

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 2012, hotel gross receipts edged up \$0.2 million to \$26.1 million. This growth mostly reflected the increase in earnings by resort hotels while the sales by other accommodation types declined. Resort hotels recorded \$24.1 million in revenue on the strength of increased alcohol sales. Other tourist accommodations, cottage colonies and small hotels all reported lower revenue of 28.4 per cent, 14.8 per cent and 4.7 per cent, respectively.

Revenue earned from room sales dipped one per cent compared to the first quarter of 2011 but still accounted for more than

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 ^R	22.5	7.2	29.7	0.0	29.7
2nd Qtr ^R	66.2	20.5	86.7	21.4	108.1
3rd Qtr ^R	74.8	20.2	95.0	24.4	119.4
4th Qtr ^R	43.1	11.9	55.0	9.0	64.0
Year ^R	206.6	59.8	266.4	54.8	321.2
2010					
1st Qtr ^R	23.8	6.5	30.3	0.2	30.5
2nd Qtr ^R	94.6	22.4	117.0	30.8	147.8
3rd Qtr ^R	90.2	22.9	113.1	26.8	139.9
4th Qtr ^R	48.7	13.8	62.5	4.8	67.3
Year ^R	257.3	65.6	322.9	62.6	385.5
2011					
1st Qtr ^R	29.8	10.0	39.8	0.1	39.9
2nd Qtr ^R	101.2	25.7	126.9	33.5	160.4
3rd Qtr ^R	97.3	23.7	121.0	39.0	160.0
4th Qtr ^R	45.2	15.6	60.8	13.8	74.6
Year ^R	273.5	75.0	348.5	86.4	434.9
2012					
1st Qtr	26.5	8.6	35.1	0.6	35.7

1. Air visitors subtotals are not comparable prior to 2004.

2. Estimates for air and cruise expenditure includes departure tax.

Source: Department of Statistics

half of all hotel gross receipts. This decline mostly reflected the 3.8 percent drop in the number of bednights at commercial properties. Alcohol sales and food sales increased by 0.7 per cent and 0.1 per cent respectively, while other sales grew by 0.2 per cent.

Hotel Employment

There were 2,327 workers employed in the hotel industry at the end of January 2012. This level of employment represented an increase of 30 employees in the industry compared to the same period in 2011. Total employment within resort hotels experienced the largest growth, increasing

by 48 employees. Employment within guesthouses and micro-units remained static with 17 workers over the same period. Cottage colonies and housekeeping units employed 18 less workers.

Major resort hotels remained the largest employer in the accommodations industry, employing 1,943 workers or 83.5 per cent of the industry total. Cottage colonies and housekeeping units employed 15.8 per cent of the hotel industry workforce, representing 367 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 ⁽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

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 ^R	85.3	111.1	92.8	62.1	106.4	56.5	58.0	80.5
2nd Qtr	96.5	121.0	108.1	55.9	124.2	66.1	95.1	94.4
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	94.4	120.3	113.7	51.2	116.1	63.6	88.7	92.3
2012								
1st Qtr	86.1	118.0	102.1	48.0	107.7	61.1	57.1	79.6

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

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.

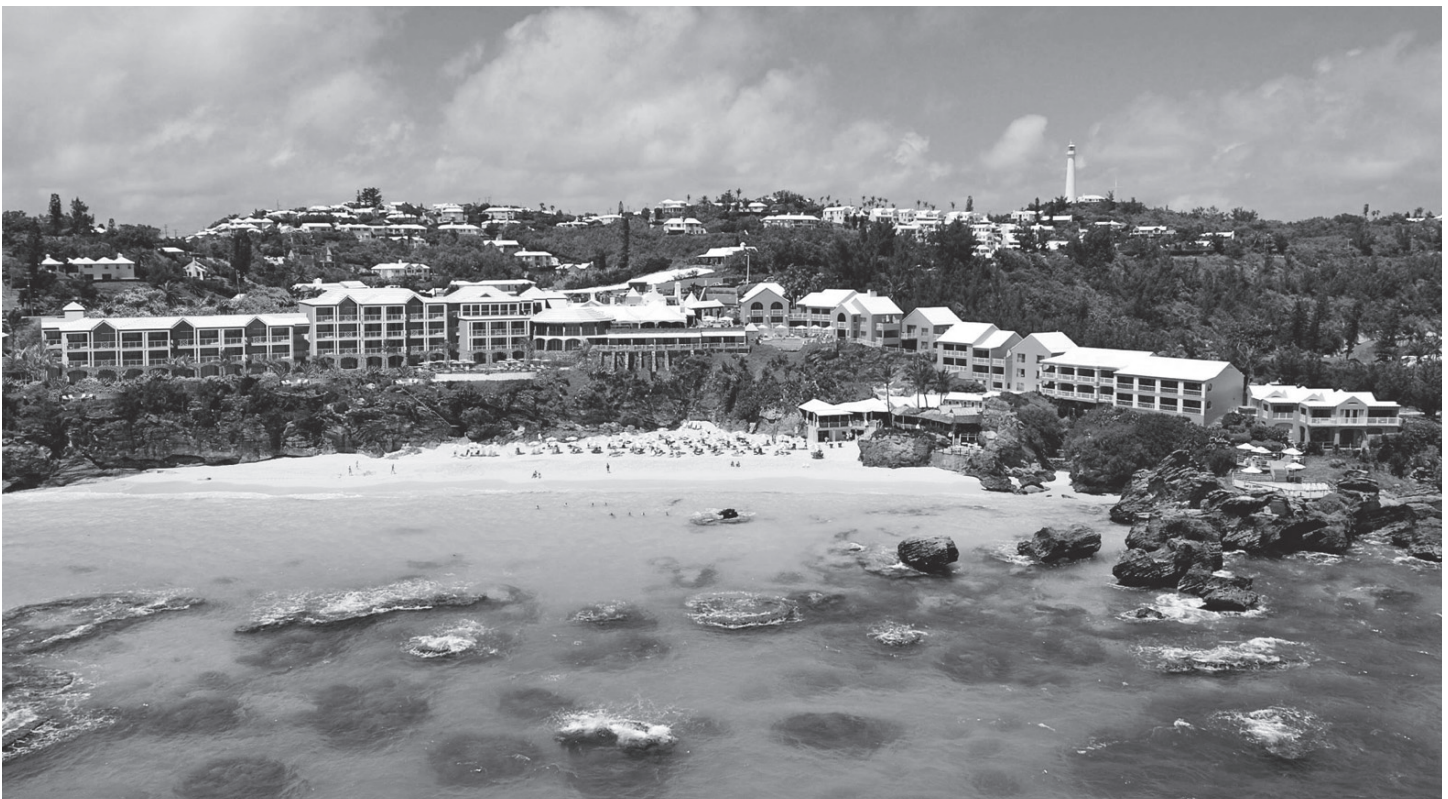
Source: H.M. Customs



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 ^a	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 ^a	23,621	849	900	510	25,880
2nd Qtr	68,649	4,905	1,416	726	75,696
3rd Qtr	74,865	6,073	1,503	572	83,013
4th Qtr	35,453	1,857	1,055	511	38,876
Year	202,588	13,684	4,874	2,319	223,465
2012					
1st Qtr	24,123	809	767	365	26,064

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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