

Q2|2014



GOVERNMENT OF BERMUDA
Cabinet Office
Department of Statistics

Quarterly Bulletin of Statistics

Q2 2014 Highlights

Air Arrivals:

Bermuda hosted 73,122 tourists..

Tourist Accommodations:

Hotel Gross Receipts amounted to \$86.4 million.

Hotel Employment:

The Hotel Industry employed 2,301 workers.

Overseas Spending:

Residents declared overseas purchases of \$14.3 million.

Retail:

Gross turnover in the retail sector reached \$262.3 million.

Visitors Arrivals and Expenditure:

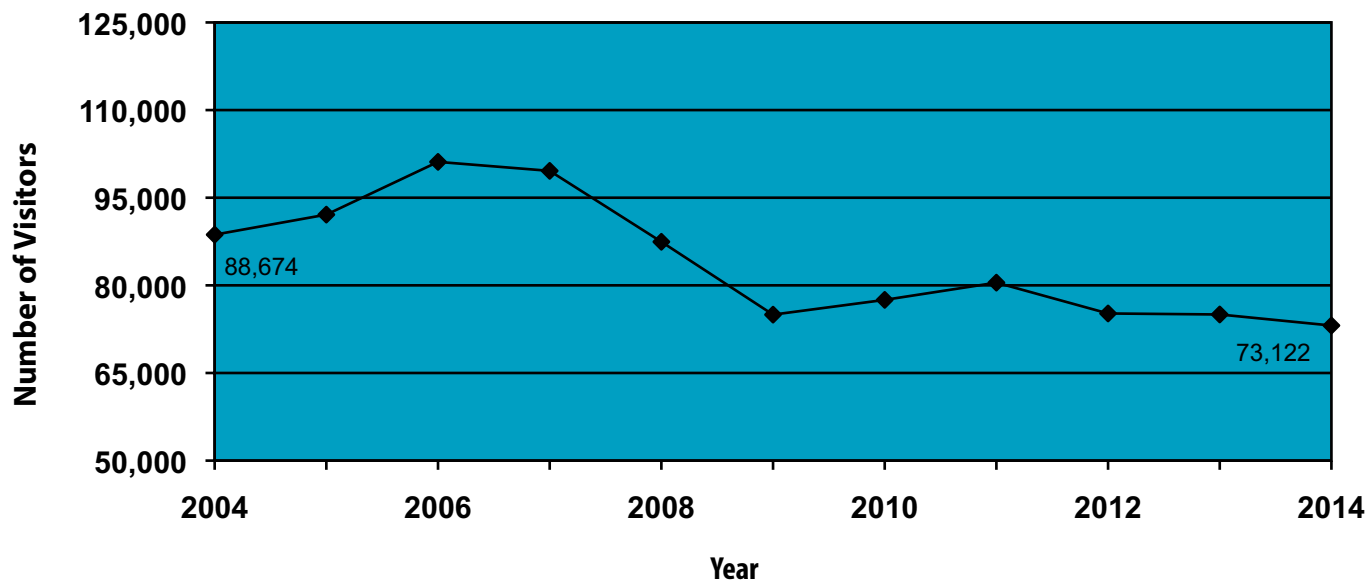
Air Arrivals

Air arrivals for the second quarter of 2014 declined 2.5 per cent when compared to the same quarter of 2013. A total of 73,122 visitors arrived via air to the Island, a decrease of 1,891 visitors year-over year.

Arrivals from the United States, Bermuda's largest tourist market, fell 5.6 per cent. In contrast, visitors from Canada increased 10.6 per cent while arrivals from the United Kingdom were 4.0 per cent higher than the levels reached in 2013. Visitors from all other countries rose 5.6 per cent compared to the same quarter of 2013.

The decline in the second quarter air arrivals translated into a decrease of 4,771 visitors staying in resort hotels. Guests staying at small hotels, cottage colonies and clubs registered 982 fewer guests. In contrast, private homes accommodated 2,522 more visitors. Housekeeping accommodations booked 1,095 more guests while the number of guests staying at guest houses increased by 81 visitors.

2nd Quarter Air Arrivals



Expenditure by Air Arrivals

During the second quarter of 2014, air visitor expenditure decreased \$12.0 million to \$91.0 million. Average spending per visitor decreased from \$1,338 to \$1,210. This decline was reflected in a 12.2 per cent drop in spending on accommodations and food. Additionally, visitors spent 9.7 per cent less on tourist-related goods and services such as souvenirs, recreational activities and transport.

Cruise Arrivals & Expenditure

Cruise ship arrivals increased 9.9 per cent due primarily to larger cruise ships visiting the Island. A total of 146,916 cruise passengers disembarked in Bermuda during the second quarter of 2014 compared to 133,676 visitors during the same period in 2013. Cruise ship passengers spent an estimated \$32.0 million or \$3.3 million more while visiting the Island.



TABLE 1 – VISITOR ARRIVALS

	Air Visitors by Country of Origin						Cruise & Air Visitors
	Cruise Passengers	U.S.A.	Canada	U.K.	Other	Total ⁽¹⁾	
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
2014							
1st Qtr	0	19,650	6,268	2,541	2,490	30,949	30,949
2nd Qtr	146,916	53,606	8,869	6,658	3,989	73,122	220,038

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⁾
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
2014							
1st Qtr	13,540	8,301	1,019	327	7,696	66	30,949
2nd Qtr	30,286	18,478	3,175	608	19,737	838	73,122

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

During the second quarter of 2014, hotel gross receipts totalled \$86.4 million. Sales receipts of resort hotels contracted 2.4 per cent to \$77.7 million. Revenue earned by small hotels fell 7.6 per cent due to lower room sales, while cottage colonies sales receipts declined 0.9 per cent. In contrast, other guest accommodations experienced a 28.6 per cent rise in sales revenue.

Revenue from room sales totalled \$48.9 million or 56.6 per cent of total hotel gross receipts. This level represented a 3.7 per cent decline over the same quarter in

2013. Sales receipts for food purchased on tourist properties abated 9.3 per cent. In contrast, alcohol sales increased 6.4 per cent while other sales which include revenue earned from news-stands, gift shops, pro-shops, green fees, marinas and banquet hall rentals rose 10.1 per cent.

Hotel Employment

Hotel employment fell 3.0 per cent as all categories of hotel establishments experienced declines in employment levels. At the end of April 2014, a total of 2,301 workers were employed in the hotel industry. Hotels employed

41 fewer workers. Cottage colonies and housekeeping units employed 24 fewer workers while guest houses and micro-units decreased their number of employees by 7 workers.

Overseas Declarations by Residents

Returning residents declared \$14.3 million in goods during the second quarter of 2014. Total declarations were 6.6 per cent lower than the value of overseas purchases declared during the same quarter of 2013. Declared spending in all commodity groups contracted during the

2nd Quarter Overseas Declarations by Residents

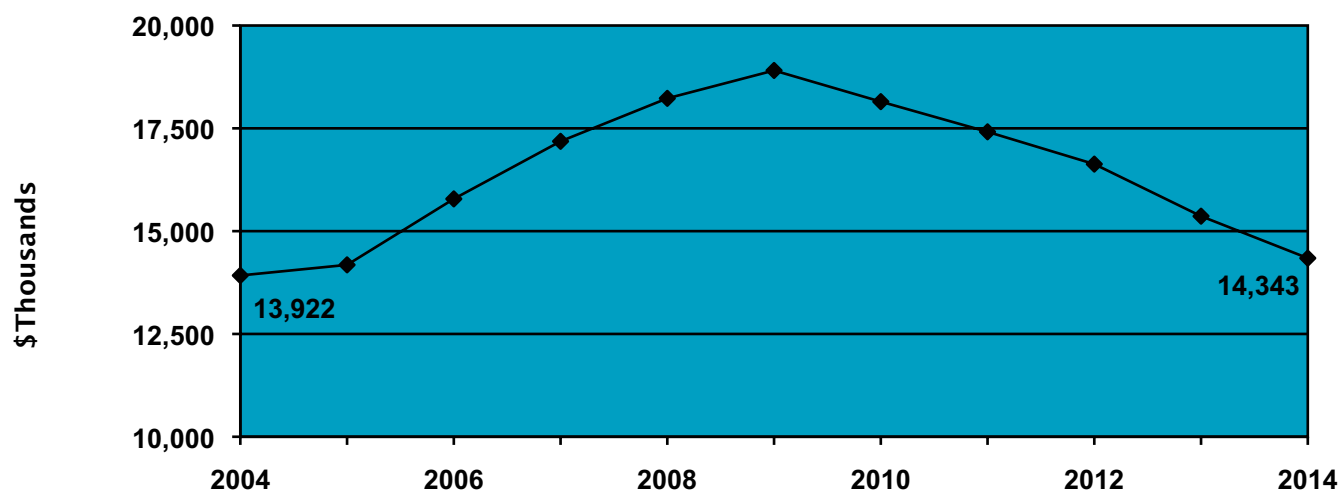


TABLE 3 – ESTIMATED EXPENDITURE OF VACATION AND BUSINESS VISITORS – \$MILLION

	Air Visitors			Cruise Visitors	Total Expenditure ⁽²⁾
	Accommodation and Food	Shopping, Entertainment, Transport, etc.	Total ⁽¹⁾		
2011					
1st Qtr	29.8	10.3	40.1	0.1	40.2
2nd Qtr	101.2	26.6	127.8	33.5	161.3
3rd Qtr	97.3	24.5	121.8	38.9	160.7
4th Qtr	45.2	16.1	61.3	13.9	75.2
Year	273.5	77.5	351.0	86.4	437.4
2012					
1st Qtr	26.5	8.9	35.4	0.6	36.0
2nd Qtr	76.8	23.2	100.0	34.2	134.2
3rd Qtr	94.4	25.7	120.1	37.9	158.0
4th Qtr	44.0	14.8	58.8	7.4	66.2
Year	241.7	72.6	314.3	80.1	394.4
2013					
1st Qtr	24.2	9.9	34.1	0.3	34.4
2nd Qtr	78.4	24.6	103.0	28.7	131.7
3rd Qtr	88.8	32.2	121.0	33.7	154.7
4th Qtr	42.7	20.0	62.7	10.1	72.8
Year	234.1	86.7	320.8	72.8	393.6
2014					
1st Qtr	23.4	7.1	30.5	0.0	30.5
2nd Qtr	68.8	22.2	91.0	32.0	123.0

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

Source: Department of Statistics

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

		Hotels	Cottage Colonies & Housekeeping	Guest Houses & Micro-Units ⁽²⁾	All Establishments
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
2014					
1st Qtr	January	1,820	339	16	2,175
2nd Qtr	April	1,918	373	10	2,301

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
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	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	85.4	123.6	109.4	41.4	107.3	49.2	57.0	77.6
2nd Qtr ^R	96.0	131.7	119.8	44.6	117.2	51.9	91.4	92.4
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	131.3	125.2	45.8	112.6	48.6	84.7	89.5
2014								
1st Qtr	85.3	122.9	115.3	54.3	104.7	44.4	53.9	75.7
2nd Qtr	97.7	133.2	132.4	56.5	117.3	45.7	93.4	91.9

1. Quarterly averages derived from monthly series

Source: Department of Statistics

quarter. Outlays on clothing and footwear totalled \$7.9 million, representing 55.4 per cent of all declarations of residents. Purchases of computer hardware and software, and electronic and photographic equipment both declined by \$0.1 million.

Among the remaining commodity groupings, levels of spending decreased for purchases of jewellery and watches (-\$77,000); household furniture and appliances (-\$51,000); tapes and compact discs (-\$44,000); toys and sporting goods (-\$26,000); and tools, machinery and parts (-\$16,000).

Retail Sales

Retail sales rose 1.8 per cent in the second quarter of 2014. A total of \$262.3 million in retail goods were sold during the period compared to \$257.9 during 2013. Motor vehicle stores recorded the largest increase in sales of 26.7 per cent due to higher volume sales during the period. Sales revenue for liquor stores was 10.5 per cent higher, reflecting the implementation of Sunday liquor sales. Sales receipts for apparel stores rose 2.2 per cent due to increased demand over the Easter holiday period. Revenue

earned by food stores increased 1.1 per cent and retail sales for services stations remained relatively unchanged, recording a fractional increase of 0.1 per cent. In contrast, building material stores recorded a decrease in sales of 11.9 per cent while gross receipts of all other store types were 0.5 per cent lower year-over-year.

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
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
2014										
1st Qtr	4,980	1,093	295	431	107	499	303	190	2,711	10,609
2nd Qtr	7,950	1,036	339	480	98	491	305	209	3,435	14,343

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
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	83,313	5,968	2,414	643	92,308
4th Qtr	44,722	2,625	2,038	595	49,980
Year	234,247	14,240	8,696	2,218	259,401
2013					
1st Qtr	29,349	1,046	1,845	355	32,595
2nd Qtr ^a	79,542	5,703	2,659	668	88,572
3rd Qtr	87,892	6,079	2,518	661	97,150
4th Qtr	45,882	2,563	2,112	614	51,171
Year	242,665	15,391	9,134	2,298	269,488
2014					
1st Qtr	29,725	1,079	1,960	426	33,190
2nd Qtr	77,671	5,268	2,636	859	86,434

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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