



## Quarterly Bulletin of Statistics

### Q3 2009 Highlights

**Air Arrivals** – Bermuda hosted 79,810 tourists.

**Tourist Accommodations** – Gross Hotel Receipts amounted to \$73 million.

**Hotel Employment** – The Hotel Industry employed 41 additional workers.

**Overseas Spending** – Resident's purchases declared from abroad totalled \$19 million.

**Retail** – Retail sales reached \$281 million.

### Visitors Arrivals and Expenditure:

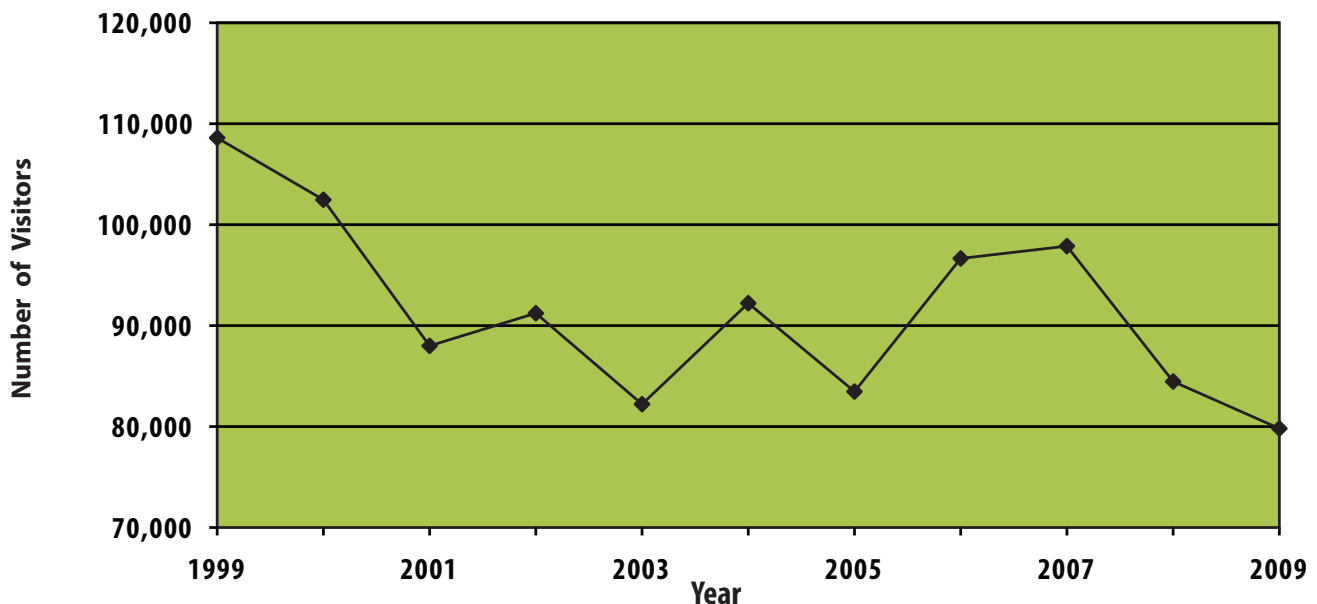
#### Air Arrivals

Air arrivals during the third quarter of 2009 were down 6 per cent compared to the same quarter in 2008. During the peak summer season, 79,810 tourists visited the Island, 4,653 less than a year ago. Air arrivals for the first three quarters of 2009 have been consistently lower year over year, as the economic downturn continues to have a negative impact on tourist travel.

Visitors from the United States comprised the largest proportion (77 per cent) of air arrivals to the Island. However, the total count fell marginally by 1 per cent to 61,113 compared to 61,691 visitors recorded in the same period last year. The number of visitors originating from the U.K. and Canada also fell during the third quarter, with declines of 23 per cent and 5 per cent respectively. However, most notably, the drop in visitors from all other countries reached 25 per cent.

The reduction in air arrivals translated into scaled back bookings at tourist properties. Resort hotels recorded a 4 per cent drop in the number of visiting guests during the quarter. In contrast, small hotels and cottage colonies experienced an increase of 25 per cent in occupancy. There were double-digit declines in staying visitors of 57 per cent and 13 per cent for housekeeping accommodations and guesthouses, respectively.

3rd Quarter Air Arrivals



## Expenditure by Air Arrivals

Passengers arriving to the Island by air spent an estimated \$105 million during the third quarter of 2009, approximately \$5 million less than the third quarter of 2008. The moderate rise in spending activity reflects slightly higher outlays by the lower number of visitors.

Expenditure on accommodation and food fell 5 per cent to \$81 million. Visitor spending on shopping, entertainment, transportation and other tourist activities decreased 5 per cent to 24 million.

## Cruise Arrivals & Expenditure

The total number of cruise travellers to the Island increased 24 per cent compared to the same quarter in 2008. A total of 141,828 cruise passengers disembarked in Bermuda as 50 cruise ships visits were made during the peak season. Cruise visitors spent \$29 million on local goods and services including entertainment, souvenirs, sightseeing, sport activities and transportation.

## Hotel Industry

Total revenue for the hotel industry contracted 16 per cent to \$73 million in the third quarter of 2009. Revenue for this industry has declined each quarter since 2008. All types of tourist accommodations recorded double-digit declines in receipt levels. Resort hotels recorded a 12 per cent drop in sales revenue, representing a loss of \$9 million. Room occupancy revenue for resort hotels totalled \$36 million, \$5 million less than earnings in 2008. Room sales accounted for 56 per cent of total revenue.

**TABLE 1 – VISITOR ARRIVALS**

Air Visitors by Country of Origin							
	Cruise Passengers	U.S.A.	Canada	U.K.	Other	Total <sup>(1)</sup>	Cruise & Air Visitors
<b>2006</b>							
1st Qtr	425	26,732	5,855	4,016	2,293	38,896	39,321
2nd Qtr	122,560	79,368	8,450	8,003	5,312	101,133	223,693
3rd Qtr	164,467	76,024	6,966	8,523	5,140	96,653	261,120
4th Qtr	48,847	45,601	6,404	6,466	3,820	62,291	111,138
<b>Year</b>	<b>336,299</b>	<b>227,725</b>	<b>27,675</b>	<b>27,008</b>	<b>16,565</b>	<b>298,973</b>	<b>635,272</b>
<b>2007</b>							
1st Qtr	2,765	32,946	5,785	4,310	2,784	45,825	48,590
2nd Qtr	130,304	77,648	8,059	8,451	5,436	99,594	229,898
3rd Qtr	175,148	75,328	7,014	9,946	5,587	97,875	273,023
4th Qtr	45,807	43,576	6,986	7,679	4,013	62,254	108,061
<b>Year</b>	<b>354,024</b>	<b>229,498</b>	<b>27,844</b>	<b>30,386</b>	<b>17,820</b>	<b>305,548</b>	<b>659,572</b>
<b>2008</b>							
1st Qtr	2,799	28,847	5,869	4,316	2,697	41,729	44,528
2nd Qtr	129,344	65,262	8,193	8,541	5,459	87,455	216,799
3rd Qtr	114,233	61,691	6,763	10,006	6,003	84,463	198,696
4th Qtr	40,032	33,588	6,382	6,392	3,604	49,966	89,998
<b>Year</b>	<b>286,408</b>	<b>189,388</b>	<b>27,207</b>	<b>29,255</b>	<b>17,763</b>	<b>263,613</b>	<b>550,021</b>
<b>2009</b>							
1st Qtr	0	21,549	4,989	3,468	2,229	32,235	32,235
2nd Qtr	124,553	56,763	7,308	6,898	4,010	74,979	199,532
3rd Qtr	141,828	61,113	6,415	7,752	4,530	79,810	221,638

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 <sup>(3)</sup>	Guest Houses <sup>(4)</sup>	Private Homes <sup>(1)</sup>	Not Stated	Total <sup>(2)</sup>
<b>2006</b>							
1st Qtr	20,139	6,857	2,045	437	9,384	34	38,896
2nd Qtr	51,394	20,369	5,820	727	22,669	154	101,133
3rd Qtr	46,895	19,363	5,790	673	23,788	144	96,653
4th Qtr	30,485	11,984	3,396	508	15,750	168	62,291
<b>Year</b>	<b>148,913</b>	<b>58,573</b>	<b>17,051</b>	<b>2,345</b>	<b>71,591</b>	<b>500</b>	<b>298,973</b>
<b>2007</b>							
1st Qtr	25,370	7,608	2,197	468	10,087	95	45,825
2nd Qtr	46,690	21,631	7,079	899	22,948	347	99,594
3rd Qtr	43,869	20,935	6,766	788	25,337	180	97,875
4th Qtr	29,086	12,212	3,382	567	16,779	228	62,254
<b>Year</b>	<b>145,015</b>	<b>62,386</b>	<b>19,424</b>	<b>2,722</b>	<b>75,151</b>	<b>850</b>	<b>305,548</b>
<b>2008</b>							
1st Qtr	22,065	6,567	2,111	410	10,521	55	41,729
2nd Qtr	40,613	17,515	5,800	732	22,312	483	87,455
3rd Qtr	37,132	16,235	5,441	694	24,751	210	84,463
4th Qtr	22,329	8,747	2,581	455	15,751	103	49,966
<b>Year</b>	<b>122,139</b>	<b>49,064</b>	<b>15,933</b>	<b>2,291</b>	<b>73,335</b>	<b>851</b>	<b>263,613</b>
<b>2009</b>							
1st Qtr	15,640	5,041	1,422	297	9,787	48	32,235
2nd Qtr	34,141	15,190	4,079	585	20,709	275	74,979
3rd Qtr	35,545	20,249	2,333	604	20,758	321	79,810

1. This category includes persons staying in commercial accommodations with less than twelve beds, as well as persons visiting with friends and relatives.

2. Excludes cruise visitors.

3. Includes Cottage Suites/Apt. and Inns

4. Includes Bed & Breakfast

Source: Tourism Department

Smaller hotels experienced a \$4 million drop in gross receipts despite the higher occupancy level during the quarter. Room sales accounted for the majority (69 per cent) of revenue for small hotels. Cottage colonies and other accommodation properties reported declines in revenue of 33 per cent and 35 per cent, respectively.

Despite the fall in occupancy levels, the industry employed 41 additional employees at the end of July 2009. Hotels and guest houses hired additional workers during the period, as employment totals at these properties increased by 102 and 3 workers,

respectively. However, cottage colonies employed 64 fewer workers compared to July 2008.

### Overseas Spending by Residents

Residents spent over \$19 million on overseas goods in the third quarter of 2009, a 2 per cent increase over 2008. The rise in overseas spending is partly responsible for the slump in sales by local retailers.

Purchases of clothing and footwear remained the largest component of total spending overseas, rising 5 per cent to \$9 million. In comparison,

local apparel sales dropped 16 per cent. Similar spending trends were seen in other commodity groupings. Expenditure on tools and machinery, and computer supplies increased 19 per cent and 16 per cent, respectively. Overseas spending on household items and jewellery both rose by 9 per cent.

Consumer outlays on tapes, compact discs, electronic equipment and misc items declined. With improved technology and easy accessibility, it is now possible to digitally download music and videos. This represents a cheaper alternative to purchasing tapes and compact disks, and may explain

lower outlays on these items both locally and abroad. Overseas spending on electronics saw a 1 per cent decline, as residents may be purchasing large ticket items, such as flat screen televisions, at locally comparable prices.

## Retail Sales

Retail sales for the third quarter were estimated at \$281 million or \$13 million less than the same period last year. This represented a decrease of 4 per cent compared to the third quarter of 2008. In uncertain economic conditions, residents remain wary of purchasing non-essential items. This is evidenced as all sectors, with the exception of

food, experienced lower sales activity. Monthly analyses show that the retail sector experienced three consecutive months of declining sales from July to September this year of 5 per cent, 3 per cent and 5 per cent, respectively.

Apparel stores registered the largest decline in sales this quarter, with a 16 per cent drop in sales revenue. The third quarter of 2009 represented the fifth consecutive quarterly fall in sales for this sector. Gross receipts for service stations were 13 per cent below the third quarter of 2008. This decline is due largely to the continued reduction in fuel prices year-over-year, along with the reduced working hours introduced by some service stations.



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

	Air Visitors			Cruise Visitors	Total Expenditure <sup>(2)</sup>
	Accommodation and Food	Shopping, Entertainment, Transport, Etc.	Total <sup>(1)</sup>		
<b>2006</b>					
1st Qtr	40.0	10.6	50.6	0.1	50.7
2nd Qtr	104.0	27.5	131.5	23.8	155.3
3rd Qtr	99.5	26.3	125.8	31.9	157.7
4th Qtr	64.1	16.9	81.0	9.5	90.5
<b>Year</b>	<b>307.6</b>	<b>81.3</b>	<b>388.9</b>	<b>65.3</b>	<b>454.2</b>
<b>2007</b>					
1st Qtr	52.1	14.3	66.4	0.5	66.9
2nd Qtr	113.2	31.1	144.3	26.0	170.3
3rd Qtr	111.3	30.5	141.8	34.9	176.7
4th Qtr	70.8	19.4	90.2	9.1	99.3
<b>Year</b>	<b>347.4</b>	<b>95.3</b>	<b>442.7</b>	<b>70.5</b>	<b>513.2</b>
<b>2008</b>					
1st Qtr	42.1	12.4	54.5	0.4	54.9
2nd Qtr	88.2	26.0	114.2	26.1	140.3
3rd Qtr	85.1	25.1	110.2	23.1	133.3
4th Qtr	50.4	14.8	65.2	8.1	73.3
<b>Year</b>	<b>265.8</b>	<b>78.3</b>	<b>344.1</b>	<b>57.7</b>	<b>401.8</b>
<b>2009</b>					
1st Qtr	22.5	7.2	29.7	0.0	29.7
2nd Qtr	66.2	20.5	86.7	25.5	112.2
3rd Qtr	81.3	23.9	105.2	28.9	134.1

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

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

**TABLE 4 – EMPLOYMENT IN HOTEL INDUSTRY BY TYPE OF ESTABLISHMENT <sup>(1)</sup>**

		Hotels	Cottage Colonies and Housekeeping	Guest Houses and Micro-Units <sup>(2)</sup>	All Establishments
<b>2006</b>					
1st Qtr	January	2,148	562	19	2,729
2nd Qtr	April	2,241	652	17	2,910
3rd Qtr	July	2,340	735	15	3,090
4th Qtr	October	<b>2,255</b>	<b>664</b>	<b>17</b>	<b>2,936</b>
<b>2007</b>					
1st Qtr	January	1,938	498	16	2,452
2nd Qtr	April	2,081	674	17	2,772
3rd Qtr	July	2,183	653	11	2,847
4th Qtr	October	<b>2,065</b>	<b>663</b>	<b>13</b>	<b>2,741</b>
<b>2008</b>					
1st Qtr	January	1,930	509	17	2,456
2nd Qtr	April	1,944	630	16	2,590
3rd Qtr	July	2,023	633	12	2,668
4th Qtr	October	<b>2,070</b>	<b>589</b>	<b>20</b>	<b>2,679</b>
<b>2009</b>					
1st Qtr	January	1,968	512	23	2,503
2nd Qtr	April	1,986	544	18	2,548
3rd Qtr	July	2,125	569	15	2,709

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 <sup>(1)</sup> Average Monthly Sales 2006 = 100.0**

	Total	Food Stores	Liquor Stores	Motor Vehicle Dealers	Service Stations	Building Materials	Apparel Stores	All Other Store Types
<b>2006</b>								
1st Qtr	86.1	90.0	77.2	95.9	88.4	98.3	62.2	82.6
2nd Qtr	103.9	102.2	103.4	105.2	103.8	110.2	106.1	102.3
3rd Qtr	102.1	104.4	110.0	100.1	108.7	101.2	96.5	100.6
4th Qtr	108.0	103.4	109.5	98.8	99.2	90.3	135.1	114.3
<b>Year</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>
<b>2007</b>								
1st Qtr	93.6	99.5	83.0	101.5	93.3	99.3	76.1	89.0
2nd Qtr	105.4	106.9	108.3	95.1	112.2	98.9	112.2	106.0
3rd Qtr	106.5	108.9	117.6	95.4	112.9	96.2	106.9	110.1
4th Qtr	111.7	110.8	108.9	88.2	105.8	91.3	141.7	119.5
<b>Year</b>	<b>104.3</b>	<b>106.5</b>	<b>104.5</b>	<b>95.1</b>	<b>106.1</b>	<b>96.4</b>	<b>109.2</b>	<b>106.2</b>
<b>2008</b>								
1st Qtr	95.1	104.2	85.8	90.5	103.0	90.9	79.2	93.9
2nd Qtr	108.0	114.3	107.5	92.2	124.3	102.5	115.9	107.0
3rd Qtr <sup>R</sup>	109.2	119.4	120.0	94.9	131.0	93.1	99.2	108.4
4th Qtr	110.8	119.3	107.7	85.1	103.2	86.2	124.3	119.6
<b>Year</b>	<b>105.8</b>	<b>114.3</b>	<b>105.3</b>	<b>90.7</b>	<b>115.4</b>	<b>93.2</b>	<b>104.7</b>	<b>107.2</b>
<b>2009</b>								
1st Qtr	93.2	112.8	82.3	83.4	87.9	85.9	64.2	91.6
2nd Qtr	103.3	120.9	107.6	85.1	102.7	95.2	95.3	101.0
3rd Qtr	104.5	125.3	119.9	84.8	113.9	91.8	83.5	99.5

1. Quarterly averages derived from monthly series

Source: Department of Statistics

Motor vehicle dealers experienced an 11 percent decrease in sales. Consumer purchases of both cars and motorcycles fell substantially, as demand remained weak for vehicle models currently in stock. The 1 per cent dip in sales of building materials is lower than previous quarterly declines, but still marked a continuing drop in sales activity reflective of the slowdown in the construction industry. Retail sales for 'All Other Store Types' fell 8 per cent.

Liquor store sales were effectively flat with a fractional decline of 1 percent during the quarter. In contrast, food stores continued to experience sales gains, reporting a 5 per cent increase in gross revenue flows which was due largely to rising grocery costs.


**TABLE 6 – RESIDENT PURCHASES ABROAD <sup>(1)</sup> \$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
<b>2006</b>										
1st Qtr	5,348	1,144	566	509	649	591	427	253	2,762	12,249
2nd Qtr	8,311	1,119	717	535	597	581	396	267	3,261	15,784
3rd Qtr	8,039	1,290	815	654	760	739	571	278	3,718	16,864
4th Qtr	9,109	1,580	863	938	838	784	628	280	3,890	18,910
<b>Year</b>	<b>30,807</b>	<b>5,133</b>	<b>2,961</b>	<b>2,636</b>	<b>2,844</b>	<b>2,695</b>	<b>2,022</b>	<b>1,078</b>	<b>13,631</b>	<b>63,807</b>
<b>2007</b>										
1st Qtr	5,458	1,062	634	520	593	618	430	234	2,830	12,379
2nd Qtr	9,090	1,217	726	609	633	729	460	264	3,456	17,184
3rd Qtr	8,757	1,564	803	722	717	770	633	272	4,184	18,422
4th Qtr	10,299	2,093	904	1,023	894	908	677	287	4,464	21,550
<b>Year</b>	<b>33,604</b>	<b>5,936</b>	<b>3,067</b>	<b>2,874</b>	<b>2,837</b>	<b>3,025</b>	<b>2,200</b>	<b>1,057</b>	<b>14,934</b>	<b>69,535</b>
<b>2008</b>										
1st Qtr	6,601	1,394	690	688	647	863	528	261	3,516	15,188
2nd Qtr	9,480	1,392	705	643	550	684	557	267	3,951	18,229
3rd Qtr	8,999	1,577	683	735	658	788	594	254	4,717	19,005
4th Qtr	9,982	2,006	791	1,038	804	904	632	268	4,626	21,050
<b>Year</b>	<b>35,062</b>	<b>6,369</b>	<b>2,869</b>	<b>3,104</b>	<b>2,659</b>	<b>3,239</b>	<b>2,311</b>	<b>1,050</b>	<b>16,810</b>	<b>73,472</b>
<b>2009</b>										
1st Qtr	6,245	1,322	588	568	548	761	422	253	3,263	13,970
2nd Qtr	10,250	1,379	694	661	327	734	572	272	4,018	18,907
3rd Qtr	9,426	1,556	746	773	568	912	645	301	4,538	19,465

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.

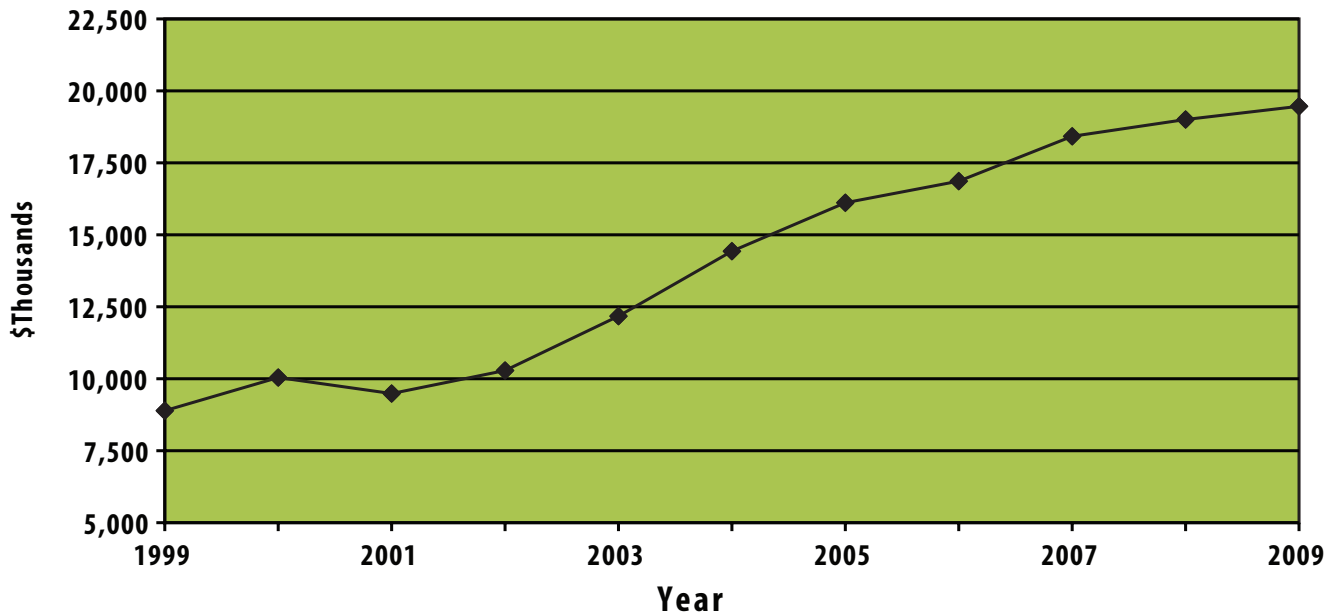
Source: H.M. Customs

**TABLE 7 – HOTEL GROSS RECEIPTS \$'000**

	Resort Hotels	Small Hotels	Cottage Colonies	Other	Total
<b>2006</b>					
1st Qtr	29,253	1,706	1,040	351	32,350
2nd Qtr	81,471	11,576	1,986	573	95,606
3rd Qtr	84,554	11,773	1,815	692	98,834
4th Qtr	47,464	5,157	1,468	453	54,542
<b>Year</b>	<b>242,741</b>	<b>30,213</b>	<b>6,309</b>	<b>2,068</b>	<b>281,331</b>
<b>2007</b>					
1st Qtr	38,450	2,028	1,223	400	42,101
2nd Qtr	84,979	13,246	2,210	608	101,043
3rd Qtr	81,449	14,182	2,248	902	98,781
4th Qtr	49,706	6,372	1,581	668	58,327
<b>Year</b>	<b>254,584</b>	<b>35,828</b>	<b>7,262</b>	<b>2,578</b>	<b>300,252</b>
<b>2008</b>					
1st Qtr <sup>R</sup>	33,367	667	1,362	598	35,994
2nd Qtr <sup>R</sup>	84,948	10,182	2,103	560	97,793
3rd Qtr <sup>R</sup>	72,530	11,246	2,009	813	86,598
4th Qtr <sup>R</sup>	47,010	4,198	1,358	596	53,162
<b>Year</b>	<b>237,855</b>	<b>26,293</b>	<b>6,832</b>	<b>2,567</b>	<b>273,547</b>
<b>2009</b>					
1st Qtr <sup>R</sup>	24,175	1,601	1,168	460	27,404
2nd Qtr <sup>R</sup>	59,552	5,242	1,613	449	66,856
3rd Qtr	63,569	7,334	1,340	532	72,775

Source: Tourism Department

**3rd Quarter Resident Purchases Abroad**





### 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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