



Quarterly Bulletin of Statistics

Q4 2010 Highlights

Air Arrivals: Bermuda hosted 47,079 tourists who spent \$62.5 million

Tourist Accommodations: Hotel Gross Receipts amounted to nearly \$41 million

Hotel Employment: The Hotel Industry employed 2,469 workers

Overseas Spending: Residents declared overseas purchases totalling \$21.4 million

Retail: Gross turnover in the retail sales sector reached \$274 million

Visitors Arrivals and Expenditure:

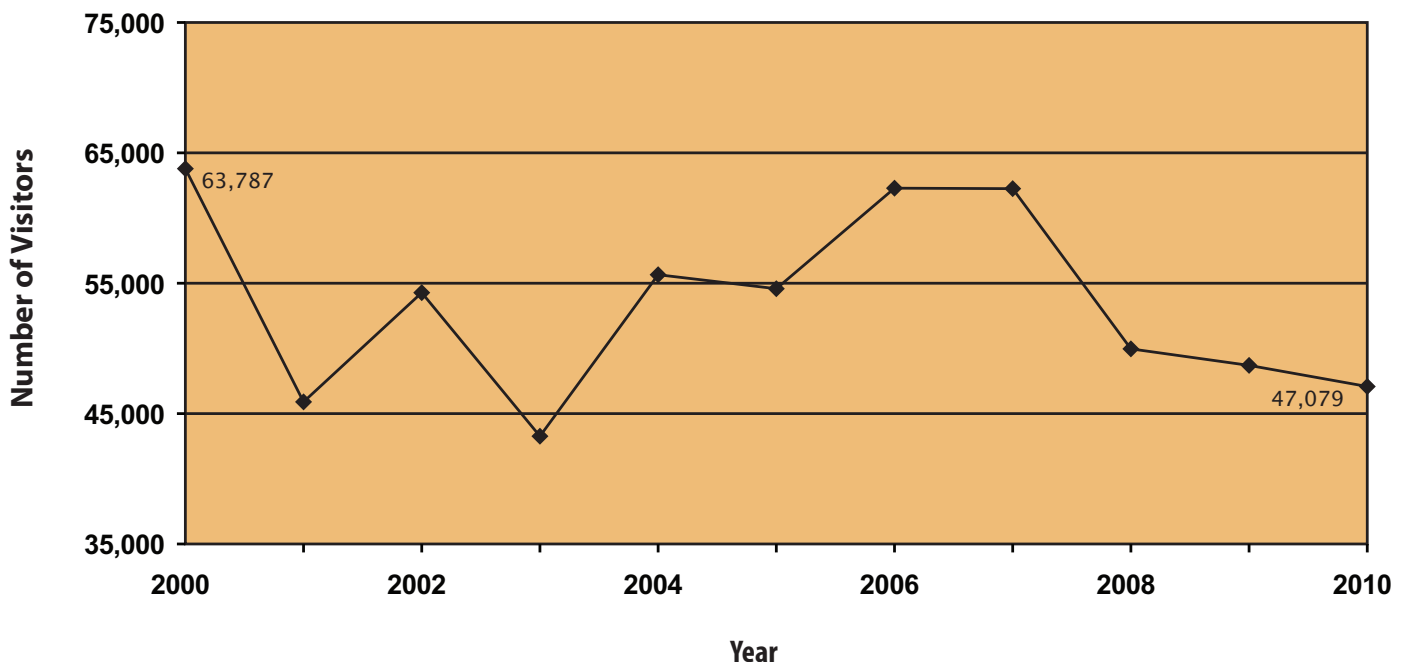
Air Arrivals

Air arrivals during the fourth quarter of 2010 decreased by 3% to 47,079 compared to the same quarter in 2009. Fourth quarter air arrivals have declined every year since 2007. Overall, air arrivals for the entire year fell nearly 2% totalling 232,262. This represented roughly 3,600 less air visitors to the Island than in 2009

Although the number of visitors from the United States remained the largest proportion (65%) of air arrivals to the Island during the quarter, the total count of visitors from this market fell by 7% to 30,809. The addition of daily flights servicing Bermuda from Canada positively affected visitor arrivals from the Canadian region. The number of visitors originating from Canada followed the trend of the second and third quarters, increasing a strong 24% compared to the same period last year. In contrast, air arrivals from the U.K. and all other countries fell by 4% and 14%, respectively.

The general decline in air arrivals translated into fewer bookings at visitor accommodations. All categories of tourist properties and private homes reported lower levels in the number of stay-over visitors that ranged between 2% and 4% year-over-year.

4th Quarter Air Arrivals



Expenditure by Air Arrivals

A total of \$62.5 million was spent on goods and services during the fourth quarter of 2010. This represented a 14% rise in spending as a result of higher per person expenditure. Each stay-over visitor spent an average of \$1,181 in the fourth quarter of 2010 compared to \$1,038 in 2009.

Among the expenditure categories, outlays on accommodation and food increased 13% to \$49 million. Visitor spending on shopping, entertainment, transportation, and other tourist-related activities increased by 16% to \$13.8 million.

Air visitor expenditure in 2010 totalled roughly \$323 million, a rise of 21 percent over 2009.

Cruise Arrivals & Expenditure

Cruise passenger arrivals to the Island plummeted 49% compared to the same quarter in 2009 as a result of 9 fewer cruise ship calls. A total of 26,636 cruise passengers disembarked in Bermuda as 16 cruise ships anchored the ports during the quarter. These visitors spent a weak \$4.7 million on local goods and services including entertainment, souvenirs, sightseeing, sport activities and transportation. This total was \$6 million

less than the amount spent during the same period in 2009.

For the entire year, cruise ship passengers spent \$61 million, roughly \$4 million less than the \$64.9 million spent in 2009. Although there were more cruise ship calls and a higher volume of passengers that visited the Island in 2010 compared to 2009, total expenditure by these visitors declined.

Hotel Gross Receipts & Employment

Gross receipts for the hotel industry decreased by 7% to \$41 million in the

TABLE 1 – VISITOR ARRIVALS

Air Visitors by Country of Origin							
	Cruise Passengers	U.S.A.	Canada	U.K.	Other	Total ⁽¹⁾	Cruise & Air Visitors
2007							
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
Year	354,024	229,498	27,844	30,386	17,820	305,548	659,572
2008							
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
Year	286,408	189,388	27,207	29,255	17,763	263,613	550,021
2009							
1st Qtr	0	21,549	4,989	3,468	2,229	32,235	32,235
2nd Qtr ^R	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

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⁾
2007							
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
Year	145,015	62,386	19,424	2,722	75,151	850	305,548
2008							
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
Year	122,139	49,064	15,933	2,291	73,335	851	263,613
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

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

fourth quarter of 2010. Lower receipts in the hotel industry were also reported in the fourth quarters of 2008 and 2009. The decline in sales revenue for this industry was consistent with the 3% decline in air arrivals for the same period, and the 5% decline in hotel employment at the end of October 2010.

Resort hotels and small hotels experienced declines in sales revenue while cottage colonies and other tourist accommodation properties reported gains. Resort hotels recorded a 6.6% drop in sales revenue,

representing a loss of \$2.6 million. Small hotels experienced a \$0.5 million drop in gross receipts, a decline of 16.4%. In contrast, cottage colonies and other tourist properties reported positive gains during the fourth quarter of 1.6% and 6.4%, respectively. At the end of 2010, total hotel gross receipts stood at \$205 million, an estimated \$6 million below total receipts earned in 2009.

The fall in occupancy levels triggered lower employment levels in the industry. There were 126 fewer employees at the

end of October 2010 compared to the prior year. Employment at the major hotel resorts grossed 1,972 workers, 48 fewer than the same period in 2009. Cottage colonies also reduced their staff levels, employing 81 fewer workers. In contrast, total employees at guest houses and smaller tourist properties increased by 3 workers to 17 in total.

Retail Sales

Consumers spent 4.7% less on retail goods during the fourth quarter of 2010 compared with the same quarter of 2009.

Retail sales revenue was estimated at \$274 million or \$15 million less than the same period last year. All sectors experienced lower sales activity with the exception of service stations whose sales increased fractionally by less than 1 %.

The slowdown in the construction industry continued to affect sales of building materials. Building material suppliers registered a strong decline in sales of 27.1 % year over year.

Motor vehicle dealers experienced a 14.7 % drop in gross receipts. This marked the fifteenth consecutive quarter of negative sales growth. This was due largely to a decrease in the volume of motor vehicles sold throughout the period. Retail sales for all other store types fell 6 %.

During 2010, the annual gross turnover in the retail sector was measured at \$1.1 billion. This reflected \$40 million less in sales receipts compared to 2009. Monthly analyses show that the retail sector as a

whole experienced declining sales for every month during 2010. The main contributors to the annual decline in retail sales were building material stores, and motor vehicle stores which reported sales declines of 25 % and 19 percent, respectively.

Overseas Spending by Residents

Residents declared overseas purchases valued at \$21 million during the fourth quarter of 2010, consistent with the fourth

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⁾		
2007					
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
Year	347.4	95.3	442.7	70.5	513.2
2008					
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
Year	265.8	78.3	344.1	57.7	401.8
2009					
1st Qtr	22.5	7.2	29.7	0.0	29.7
2nd Qtr	66.2	20.5	86.7	25.4	112.1
3rd Qtr	74.8	20.2	95.0	28.9	123.8
4th Qtr	43.1	11.9	55.0	10.6	65.6
Year	206.6	59.8	266.4	64.9	331.3
2010					
1st Qtr	23.8	6.5	30.3	0.2	30.5
2nd Qtr	94.6	22.4	117.0	30.0	147.0
3rd Qtr	90.2	22.9	113.1	26.1	139.2
4th Qtr	48.7	13.8	62.5	4.7	67.2
Year	257.3	65.6	322.9	61.0	383.9

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 ⁽¹⁾

	Hotels	Cottage Colonies and Housekeeping	Guest Houses and Micro-Units ⁽²⁾	All Establishments
2007				
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	2,065	663	13	2,741
2008				
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	2,070	589	20	2,679
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 ^R	1,952	464	19	2,435
3rd Qtr July	2,027	519	19	2,565
4th Qtr October	1,972	480	17	2,469

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
2007								
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
Year	104.3	106.5	104.5	95.1	106.1	96.4	109.2	106.2
2008								
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	109.1	119.2	120.0	94.9	131.0	93.1	99.2	108.4
4th Qtr	111.7	121.7	107.7	85.2	109.4	85.6	123.1	117.9
Year	106.0	114.9	105.3	90.7	116.9	93.0	104.4	106.8
2009								
1st Qtr	92.9	110.6	81.3	80.9	93.8	83.6	62.4	91.9
2nd Qtr ^R	104.7	121.2	103.2	92.5	105.8	98.6	90.9	99.0
3rd Qtr ^R	105.1	125.2	133.8	97.5	113.6	91.8	84.0	99.4
4th Qtr ^R	107.2	122.7	128.3	75.7	107.3	73.8	119.5	109.0
Year	102.5	119.9	111.7	86.7	105.1	87.0	89.2	99.8
2010								
1st Qtr	90.4	113.2	80.7	80.2	104.7	66.7	62.3	84.4
2nd Qtr	99.9	120.4	102.3	73.7	113.5	73.1	89.9	97.7
3rd Qtr	97.6	124.8	131.0	61.4	113.3	66.5	79.7	95.6
4th Qtr	102.2	122.5	124.1	64.6	108.7	53.8	116.7	104.5
Year	97.5	120.2	109.5	70.0	110.1	65.0	87.2	95.6

1. Quarterly averages derived from monthly series

Source: Department of Statistics

quarter purchases during the past 3 years. The 4% growth in declared purchases followed four consecutive quarterly declines in spending levels. In contrast, domestic retail sales were down by 5% this quarter.

Overseas purchases of clothing and footwear remained the largest component of total outlays, representing 47% of all declared purchases. Overseas expenditures on these items increased marginally by 2%, while local spending on the same type of goods fell by an equal

amount. Higher purchases were also recorded for electronics, toys and sports goods, computer hardware and software, jewellery and miscellaneous items.

In contrast, outlays on household items, tape and compact discs, and tools and machinery declined by 6%, 14% and 9%, respectively.

During the year 2010, residents spent a total of \$72 million on overseas purchases. Spending on clothing and footwear accounted for close to half of this expenditure at \$35 million.


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
2007										
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
Year	33,604	5,936	3,067	2,874	2,837	3,025	2,200	1,057	14,934	69,535
2008										
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
Year	35,062	6,369	2,869	3,104	2,659	3,239	2,311	1,050	16,810	73,472
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

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.

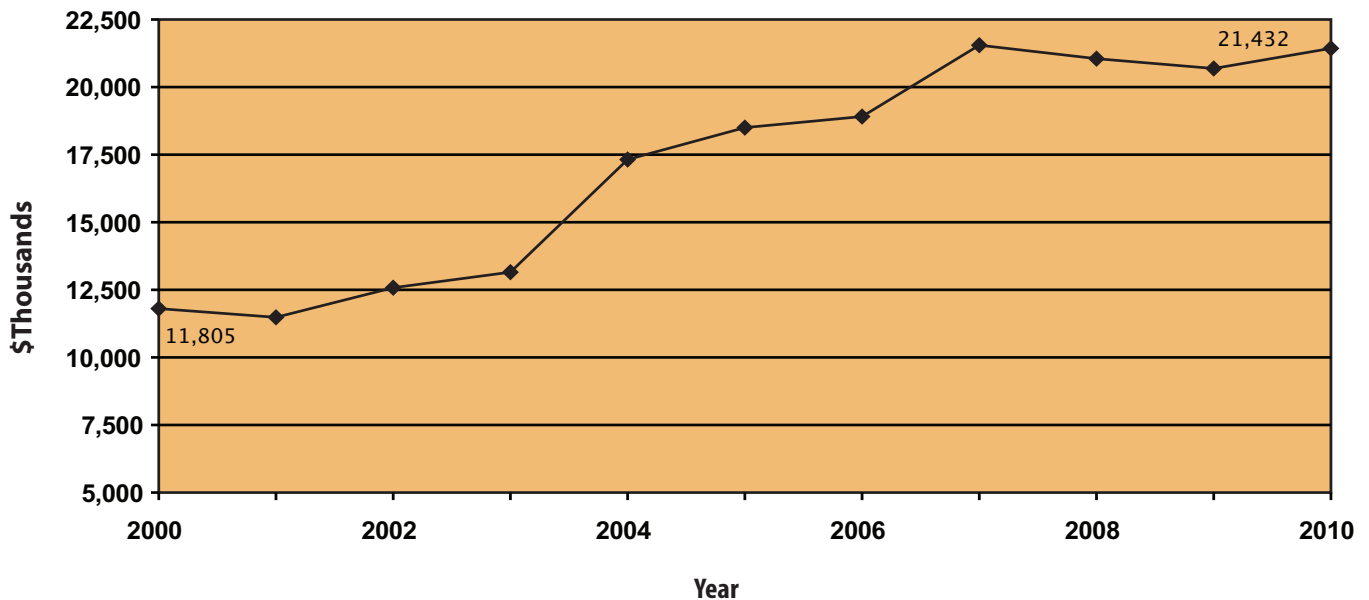
Source: H.M. Customs

TABLE 7 – HOTEL GROSS RECEIPTS \$000

	Resort Hotels	Small Hotels	Cottage Colonies	Other	Total
2007					
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
Year	254,584	35,828	7,262	2,578	300,252
2008					
1st Qtr	33,367	667	1,362	598	35,994
2nd Qtr	84,948	10,182	2,103	560	97,793
3rd Qtr	72,530	11,246	2,009	813	86,598
4th Qtr	47,010	4,198	1,358	596	53,162
Year	237,855	26,293	6,832	2,567	273,547
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	61,222	6,531	1,589	413	69,755
3rd Qtr ^a	62,562	6,257	1,566	563	70,948
4th Qtr	36,981	2,296	1,054	515	40,846
Year	181,650	16,147	4,988	1,919	204,704

Source: Tourism Department

4th 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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