



## Quarterly Bulletin of Statistics

### Q2 2009 Highlights

**Air Arrivals** – Bermuda hosted 74,979 tourists.

**Tourist Accommodations** – Gross Hotel Receipts amounted to \$69 million.

**Hotel Employment** – The Hotel Industry employed 42 fewer workers.

**Overseas Spending** – Resident's Purchases declared from abroad totaled \$19 million.

**Retail** – Retail sales reached \$277 million.

### Visitors Arrivals and Expenditure:

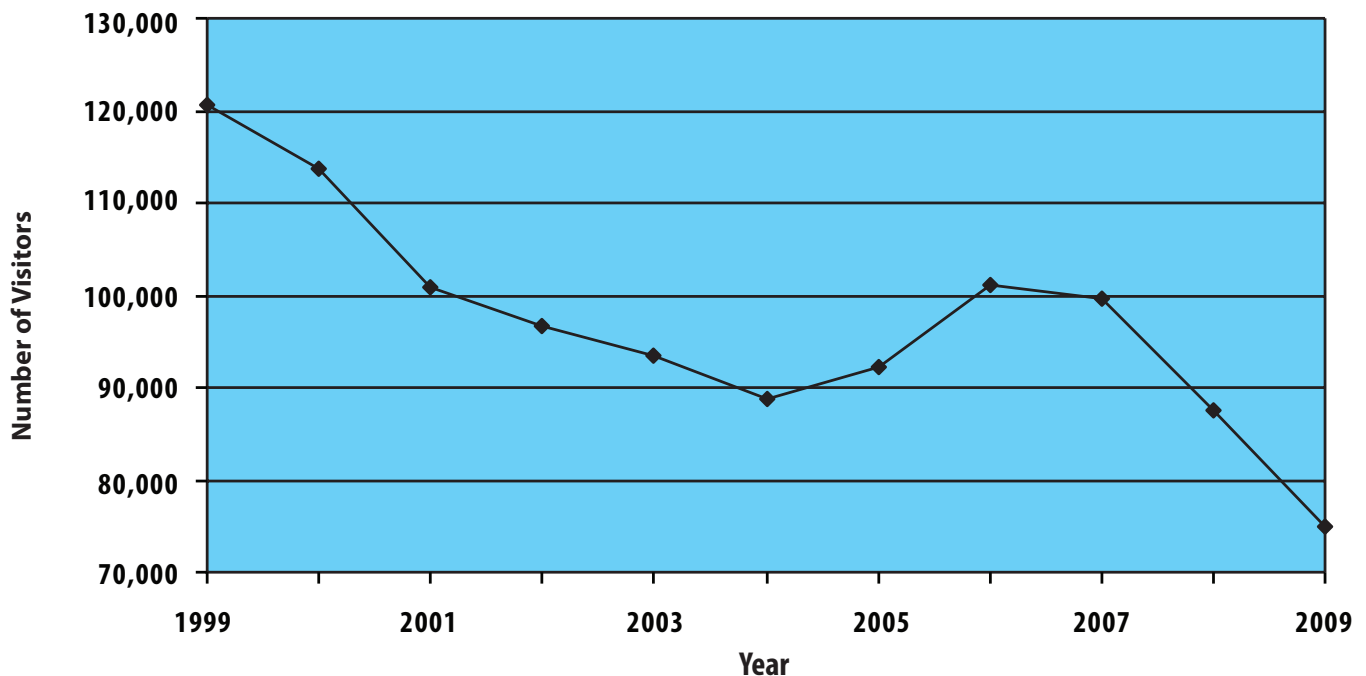
#### Air Arrivals

The global recession continued to affect air arrivals to Bermuda during the second quarter of 2009. A total of 74,979 tourists visited the Island during the quarter, 14 per cent below the level of 87,455 reached in 2008. The double-digit decline in visitors is systemic of the struggling tourist industry worldwide, where other tourism-dependent destinations are also feeling the squeeze despite lower air fares and deeply discounted hotel packages to attract visitors.

Visitors from all major tourist markets declined during the second quarter of 2009. Tourists originating from the United States fell 13 per cent to 56,763 compared to 65,262 visitors in the previous year. Canadian tourist arrivals dipped 11 per cent to 7,308 visitors from 8,193 in 2008. Visitors from the United Kingdom and all other countries declined by 19 per cent and 27 per cent, respectively.

The overall decline in air arrivals was reflected by fewer bookings at tourist properties. Resort hotels recorded lower occupancy totals as the number of guests fell 16 per cent to 34,141. All smaller commercial guest properties also experienced double-digit declines in occupancy levels for the same period.

2nd Quarter Air Arrivals



## Cruise Arrivals and Expenditure

There were 124,553 cruise passengers to Bermuda during the second quarter of 2009. This represented a 4 per cent decrease year-over-year. The lower volume of cruise passengers was directly attributed to fewer cruise ship arrivals during the quarter. The month of April alone had half as many visiting cruise ships compared to April 2008, resulting in approximately 19,000 fewer passenger arrivals. Increased passenger arrivals in May and June were not enough to offset the sharp decline in April's cruise visitor total.



Cruise ship passengers spent an estimated \$25.5 million while visiting the Island this quarter, or about half a million dollars less than in the previous year.

### Expenditure by Air Arrivals

In the second quarter of 2009, expenditure by tourists arriving by air declined 24 per cent, reflective of the downturn in air arrivals during the period. Air visitors spent an estimated \$87 million during the quarter, nearly \$28 million less than in 2008.

Spending on accommodation and food was also lower as air visitors spent \$22 million less during the quarter. Similarly, visitor outlays on shopping, entertainment, transportation, and

**TABLE 1 – VISITOR ARRIVALS**

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

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

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

other activities also fell 21 per cent to \$21 million.

## Overseas Spending by Residents

Residents purchased close to \$19 million in overseas goods during the second quarter of 2009. This was \$678,000 more than the value of purchases declared last year. The growth in overseas spending also marked a positive turnaround from the lower levels of purchases in the two previous quarters.

Outlays on clothing and footwear rose 8 per cent to \$10 million, and accounted for more than half of total overseas purchases. Residents clearly favoured overseas bargains on apparel, as domestic clothing retailers registered a

18 per cent decline in sales during the same period.

Amongst other commodity groupings, residents spent more on computer goods, toys and sports goods. In contrast, declines in overseas spending were recorded for tapes, compact discs, household items and electronic equipment. Local retail sales of these items were also lower during this period.

## Hotel Industry Statistics

Revenue for the hotel industry fell 29 per cent to \$69 million in the second quarter of 2009. All types of accommodation properties experienced sharp reductions in gross receipts. Room occupancy sales for resort hotels totaled \$33 million in the second quarter. This

was approximately \$14 million below earnings from hotel room sales in the same quarter last year. The decline in revenue from room sales was attributed partly to the 14 per cent fall in air arrivals during the second quarter. Aggressive marketing campaigns by some hotels produced increased bookings. However, the deeply discounted room prices countered any growth in total income that would have normally resulted from more hotel guests during the promotion period. Revenue from room sales accounted for more than half of the total receipts by resort hotels during the period.

Gross receipts reported by smaller hotel properties declined 30 per cent to \$7

million compared to the same period in 2008. This reflected a \$3 million decrease in revenue. Sales from room occupancy alone totaled \$5 million, which accounted for roughly 70 percent of total revenue earned by small hotels in the second quarter of 2009.

The decline in occupancy levels and hotel revenue also negatively affected employment at some commercial guest properties around the Island. At the end of April 2009, the hotel industry employed 42 fewer employees in an effort to reduce operational costs.

Cottage colonies and housekeeping units reported a decrease of 86 employees. In contrast, hotels

experienced increased employment with 42 additional workers at the end of April 2009. Resort hotels employed three out of every four workers in the hotel industry.

### Retail Sales

Retail sales fell 4 per cent during the second quarter of 2009. A total of \$277 million in retail goods was sold during the period compared to \$290 million in 2008. All retail sectors experienced lower sales activity during this period, with the exception of food stores.

Competition from overseas prices was partly responsible for the 18 per cent decrease in sales at local apparel stores. The second quarter of 2009 represented



**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

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 <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

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 <sup>A</sup>	108.0	114.3	107.5	92.2	124.3	102.5	115.9	107.0
3rd Qtr	108.7	118.7	121.8	94.6	129.3	92.9	99.6	108.1
4th Qtr	110.8	119.3	107.7	85.1	103.2	86.2	124.3	119.6
<b>Year</b>	<b>105.7</b>	<b>114.1</b>	<b>105.7</b>	<b>90.6</b>	<b>115.0</b>	<b>93.1</b>	<b>104.8</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

1. Quarterly averages derived from monthly series

Source: Department of Statistics



the fourth consecutive quarterly decline in retail sales. The last prolonged decline in local apparel sales dated back to the closure of a major department store in late 2005.

Service stations recorded a 17 per cent fall in sales activity during the second quarter of 2009. A 9 per cent drop in fuel prices during the quarter was the main factor in the double-digit decline in revenue.

Building material stores and motor vehicle dealerships both experienced declining sales of 7 per cent and 8 per cent, respectively. Liquor store sales registered a modest increase of less than 1 per cent during the quarter.


**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

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.

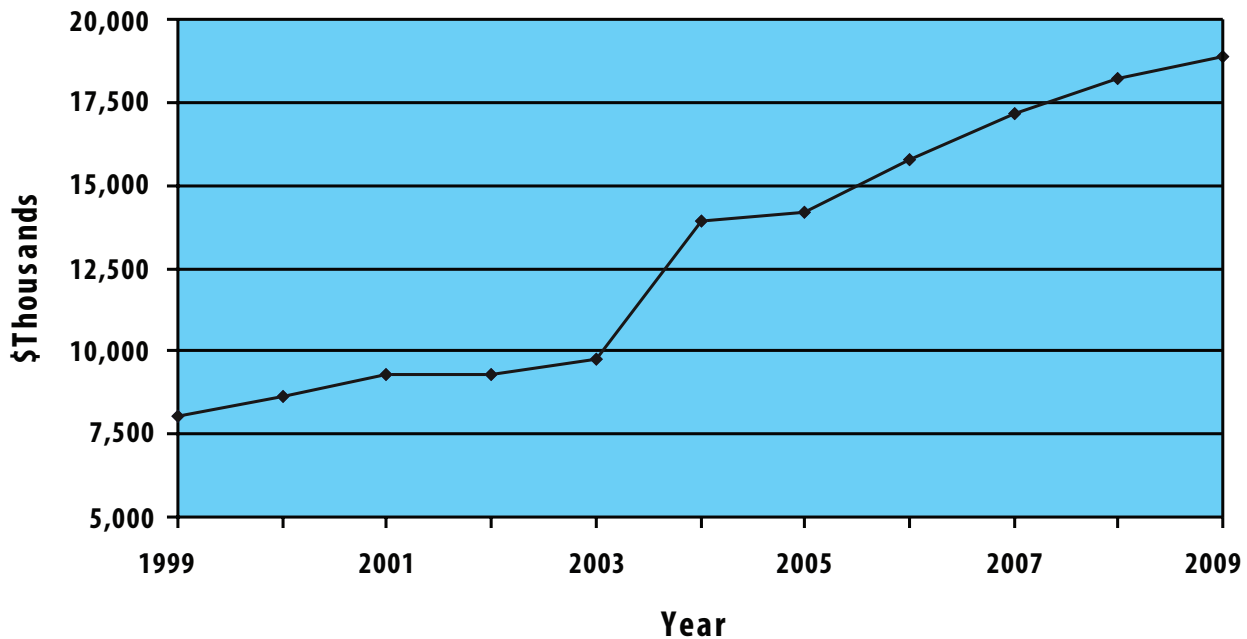
Source: H.M. Customs

**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	33,367	1,959	1,163	463	36,952
2nd Qtr	84,546	10,149	2,091	499	97,285
3rd Qtr	72,530	10,737	2,009	812	86,088
4th Qtr	47,010	4,077	1,358	595	53,040
<b>Year</b>	<b>237,453</b>	<b>26,922</b>	<b>6,621</b>	<b>2,369</b>	<b>273,365</b>
<b>2009</b>					
1st Qtr	24,243	1,580	1,168	460	27,451
2nd Qtr	60,113	7,136	1,613	449	69,311

Source: Tourism Department

**2nd 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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