



Quarterly Bulletin of Statistics

Q2 2010 Highlights

Air Arrivals: Bermuda hosted 77,512 tourists

Tourist Accommodations: Gross Hotel Receipts amounted to \$69 million

Hotel Employment: Employment in the Hotel Industry declined by 73 workers

Overseas Spending: Residents declared overseas purchases totalling \$18 million

Retail: Retail sales reached \$268 million

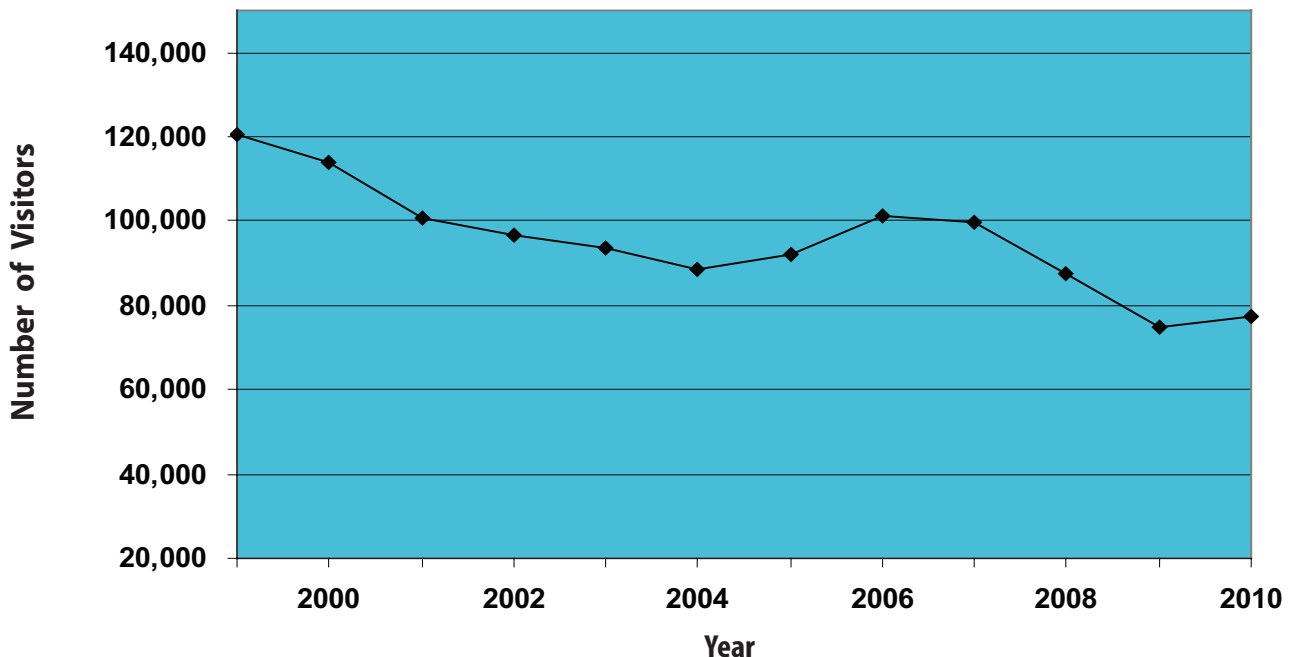
Visitors Arrivals and Expenditure:

Air Arrivals

Air arrivals during the second quarter of 2010 rebounded 3.4 per cent compared to the same quarter in 2009. A total of 77,512 tourists arrived by plane to the Island during the second quarter of the year, up from 74,985 in 2009. The increase was primarily attributed to an influx of tourists (+ 42 %) from Canada, as air arrivals climbed to 10,368 passengers compared to 7,308 reported in the same quarter of 2009. The introduction of a new low cost carrier offering daily flights from Canada was the main reason for the growth in arrivals from that market.

The visitor count from the United States increased to 57,243 air passengers compared to 56,766 reported in the same quarter of 2009. In contrast, the number of air travellers from the United Kingdom and the rest of the world decreased 9 per cent and 10 per cent, respectively.

2nd Quarter Air Arrivals



The increase in air arrivals translated into higher bookings at tourist properties. The number of visitors staying at resort hotels during the second quarter of 2010 rose 3 per cent over the same period in 2009. A total of 35,182 tourists stayed at resort hotels this quarter compared to 34,142 visitors in the same quarter of the previous year. Smaller accommodations such as small hotels, cottage colonies and clubs experienced a 28 per cent increase in visitors, while visitors staying at guesthouses advanced 15 per cent. In contrast, visitors staying in private homes and housekeeping accommodations fell 9 per cent and 40 per cent, respectively.

Expenditure by Air Arrivals

Visitor spending totalled \$117 million during the quarter and was boosted by the increase in total air arrivals and average per-person expenditure. This level of spending was 35 per cent or \$30.3 million more than in 2009.

All categories of expenditure were higher, with spending on accommodation and food accounting for the largest portion of the increase with growth of \$28.4 million. Visitor spending on shopping, entertainment and transportation rose by 9 per cent.

Cruise Arrivals & Expenditure

A total of 171,295 cruise passengers travelled to Bermuda during the second quarter of 2010. This represented a 38 per cent increase year-over-year and marked the highest cruise passenger total since the third quarter of 2007.

Cruise ship passengers spent an estimated \$30 million while visiting the Island this quarter, or about five million dollars more than in the previous year.

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

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 ^R	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

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

Overseas Spending by Residents

Travelling residents declared a total value of \$18.1 million on overseas goods during the quarter. Purchases abroad were 1 million less than the same quarter of 2009.

Outlays on clothing & footwear continued to represent the largest portion of resident purchases abroad. Although second quarter purchases of

these items fell by 5 per cent to \$9.7 million, they still accounted for 53 per cent of total overseas purchases.

Amongst other commodity groupings, residents spent less on tapes, compact discs, jewellery and watches, toys and sports goods and household items. In contrast, expenditure on computer hardware and software increased. Local retail sales of these items were also lower during this period.

Retail Sales

Consumers spent 3 per cent less on retail goods during the second quarter of 2010 compared with the same quarter of 2009.

All sectors reported lower sales this quarter with the exception of service stations which reported an increase of 11 per cent. Higher sales were boosted by a rise in the price of fuel during the quarter.

Sales of building materials and motor vehicles declined 23 per cent and 13 per cent, respectively. Increases in liquor and food prices did not translate into higher sales as liquor store sales dipped 5 percent and food sales remained relatively flat this quarter.

Hotel Employment

There were 2,475 employees in the hotel accommodation industry at the end of April 2010. The level of employment in the hotel industry represented an overall decline of 3 per cent compared to the same period in 2009. The largest absolute decline in the number of employees was reported



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

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 ^R	1,866	418	19	2,303
2nd Qtr	April	1,952	504	19	2,475

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 ^R	92.9	110.6	81.3	80.9	93.8	83.6	62.4	91.9
2nd Qtr	103.3	120.9	107.6	85.1	102.7	95.2	95.3	101.0
3rd Qtr	104.5	125.4	119.9	84.8	113.9	91.8	83.5	99.5
4th Qtr	107.4	124.0	106.6	72.4	108.6	74.0	119.5	111.1
Year^R	102.0	120.2	103.9	80.8	104.8	86.2	90.2	100.9
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

1. Quarterly averages derived from monthly series

Source: Department of Statistics

for cottage colonies & housekeeping with 40 fewer workers compared to April 2009. The drop in employment level can be attributed to the closure of some smaller establishments or their transformation to private dwellings. Major hotels also hired fewer workers.

Major hotels remained the largest employer accounting for 79 per cent or 1,952 workers in the accommodation industry. Cottage colonies and housekeeping units employed 20 per cent or 504 workers, while guesthouses and micro-units employed less than 1 per cent of the workers in the hotel industry.

Hotel Gross Receipts

The 3 per cent growth in stay over visitors translated into a near \$3 million increase in hotel gross receipts this quarter. The hotel industry collected \$69.7 million in the second quarter of 2010 with resort hotels earning 88 per cent of total hotel revenue. Small hotels also benefitted from the increased occupancy which earned them an additional \$1.3 million compared to the same period of 2009.

Lower occupancy at cottage colonies and other tourist accommodations factored into declines in revenue experienced at these properties.



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 ^R	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

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.

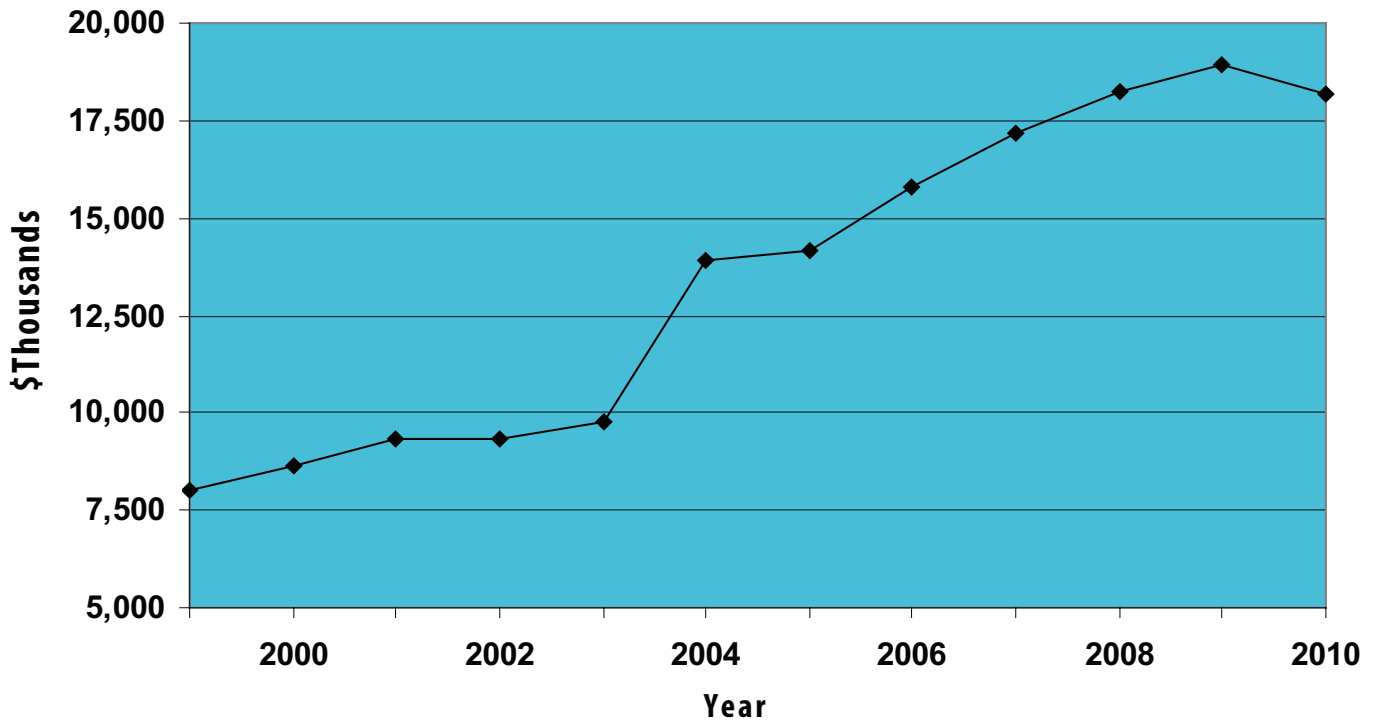
Source: H.M. Customs

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	501	23,228
2nd Qtr	61,222	6,524	1,589	413	69,748

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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