



## Quarterly Bulletin of Statistics

### Q3 2011 Highlights

**Air Arrivals:** Bermuda hosted 79,917 tourists.

**Tourist Accommodations:** Gross Hotel Receipts amounted to \$83 million.

**Hotel Employment:** The hotel industry employed 2,649 workers

**Overseas Spending:** Residents declared overseas purchases totalling \$18.5 million.

**Retail:** Retail sales reached \$257.3 million.

**Imports:** Payments for imported goods totalled \$236.8 million.

### Visitors Arrivals and Expenditure:

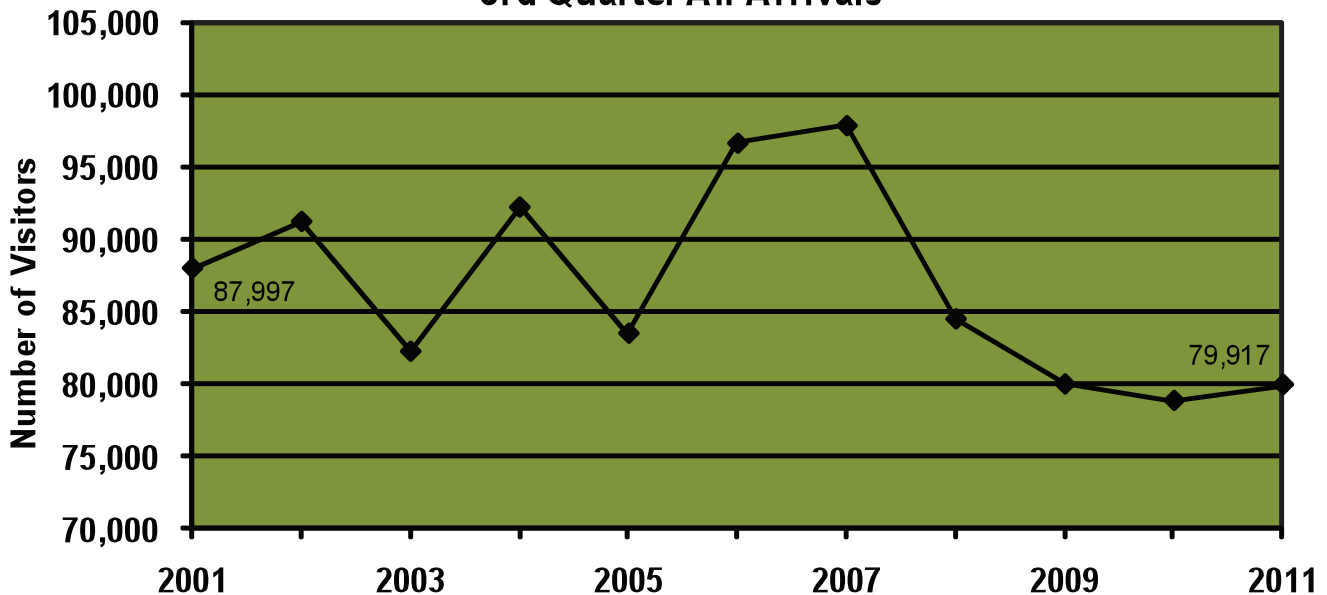
#### Air Arrivals

Air arrivals during the third quarter of 2011 increased by 1.4 per cent when compared to the same quarter of 2010. A total of 79,917 visitors arrived by air to the Island, up from 78,806 a year ago when the passages of hurricanes Irene and Maria negatively impacted air arrivals. Arrivals from the United States, Bermuda's largest tourist market, increased 4.9 per cent compared to the third quarter of 2010. A total of 61,651 U.S. visitors travelled to the Island compared with 58,783 visitors in the same period of 2010. Arrivals from the all other countries category rose by 6.1 per cent

In contrast, visitors from Canada fell by 17.2 per cent. This decrease was attributed to a cut in flight service from this market to the Island by four flights per week. The number of visitors from the United Kingdom declined by 7.5 per cent.

A breakdown of visitors by intended type of accommodation revealed that small hotels and resort hotels registered increases in visitors of 5.9 per cent and 2 per cent, respectively. However, occupancy at housekeeping accommodations dropped by 6.9 per cent while visitors staying at guest houses also declined by 4.2 per cent. The number of guests staying at private homes fell by 2.6 per cent.

3rd Quarter Air Arrivals



### Expenditure by Air Arrivals

Passengers arriving to the Island by air spent an estimated \$121 million during the third quarter of 2011. This represented a \$7.9 million or 7 per cent increase year-over-year. This growth was linked to visitors spending 7.9 per cent more on accommodations and food. Of the total spending on shopping, entertainment transport and other services, visitors spent 9 per cent more on retail goods including gifts and souvenirs and 6.8 per cent more on transportation while in Bermuda.

### Cruise Arrivals and Expenditure

During the third quarter of 2011, cruise ship passengers travelling to Bermuda increased by 25.8 per cent to 187,487 passengers when compared to the previous year. This increase was attributed to 3 additional ships sailing to the Island in July and August and 10 additional cruise ship calls in September.

Expenditure on local goods and services, including entertainment, souvenirs,

sightseeing, sports activities and transportation increased to \$33.4 million. This was 28.0 per cent or \$7.3 million more year-over-year.

### Hotel Gross Receipts

Total revenue for the hotel industry jumped 19.9 per cent to \$83 million in the third quarter of 2011. Resort hotels experienced an increase of 23.6 per cent in sales revenue, boosted by an increase in occupancy and convention-related sales. In contrast, small hotels, cottage colonies, and other tourist accommodations experienced declines of 6.8 per cent, 3.6 per cent, and 2.9 per cent, respectively.

Receipts from room sales accounted for 56.4 per cent of total gross receipts, or \$46.8 million. Food sales and alcohol sales contributed 25.4 per cent and 8.4 per cent to the total, respectively.

### Hotel Employment

There were 2,649 workers employed in the hotel industry at the end of July 2011. This represented an increase of 84 workers compared to last year. Hotels

employed 2,192 workers which was 165 more than the same period in 2010. In contrast, employment at cottage colonies and housekeeping decreased by 79 to 440 workers, while the number of workers at guest houses and smaller tourist properties decreased by 2 to 17 workers.

### Overseas Spending by Residents

Residents spent \$18.5 million on overseas goods during the third quarter of 2011. The total value of good declared was \$76,000 less than a year ago. This represented a 0.4 per cent decline in overseas expenditure. Spending on clothing and footwear fell by \$348,000 from \$8.8 million in the third quarter of 2011. Clothing and footwear purchases have declined every quarter this year but still accounted for nearly half (47.3 per cent) of total overseas purchases by residents.

Outlays on electronic & photographic equipment, and computer hardware & software recorded increases of 9.3 per cent and 8.3 per cent, respectively. The growth in these categories was likely



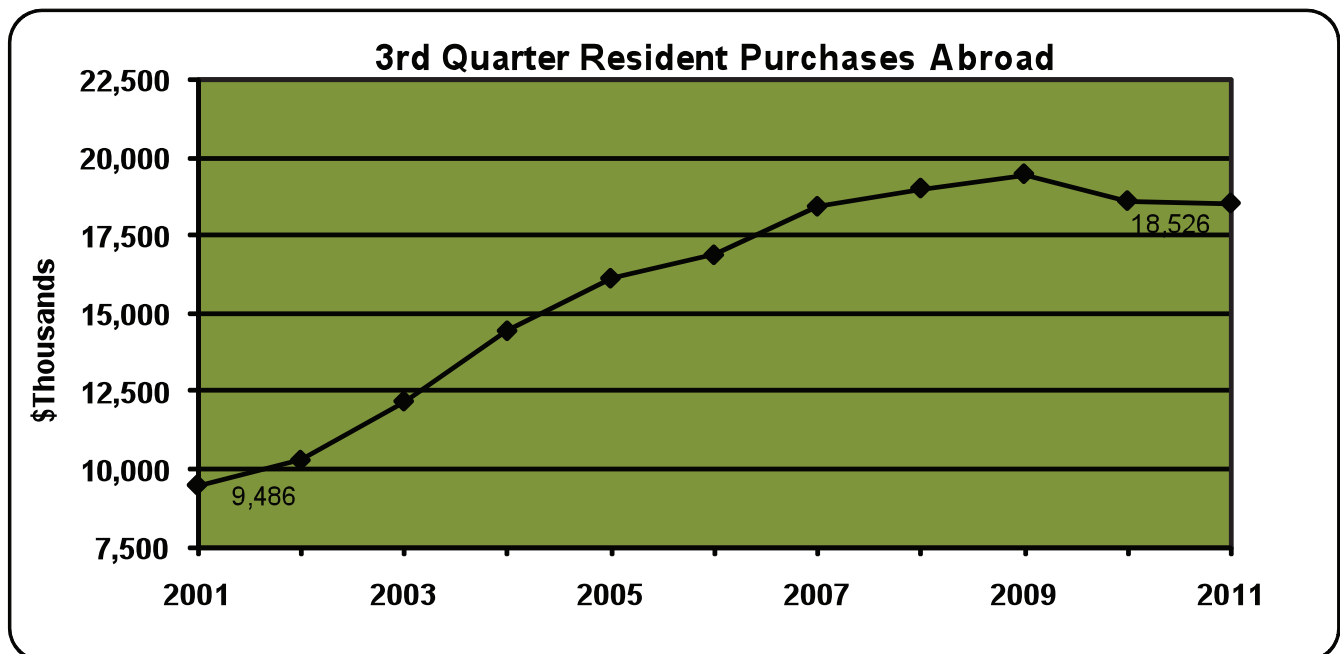
**TABLE 1 – VISITOR ARRIVALS**

**Air Visitors by Country of Origin**

	Cruise Passengers	U.S.A.	Canada	U.K.	Other	Total <sup>(1)</sup>	Cruise & Air Visitors
<b>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
Year	286,408	189,388	27,207	29,255	17,763	263,613	550,021
<b>2009</b>							
1st Qtr	0	21,549	4,989	3,468	2,229	32,235	32,235
2nd Qtr	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
<b>2010</b>							
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
<b>2011</b>							
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	187,487	61,651	6,722	7,348	4,196	79,917	267,404

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>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
Year	122,139	49,064	15,933	2,291	73,335	851	263,613
<b>2009</b>							
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
<b>2010</b>							
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
<b>2011</b>							
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

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



related to the growing demand for tablet computers, ebook readers and smart phones. Among the other commodity groupings, sales contracted for tapes & compact discs (-21.6 per cent), jewellery and watches (-8.6 per cent), tools, machinery and parts (-7.4 per cent) and household items, furniture and appliances (-7.2 per cent).

**Retail Sales**

Retail sales for the third quarter of 2011 were estimated at \$257.3 million. This represented a \$4.9 million decrease when compared to the third quarter of 2010. Of the seven retail sectors, service stations, apparel stores, and building materials recorded increases in sales. The 6.9 per cent

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

	Accommodation and Food	Shopping, Entertainment, Transport, Etc.	Total <sup>(1)</sup>	Cruise Visitors	Total Expenditure <sup>(2)</sup>
<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
Year	265.8	78.3	344.1	57.7	401.8
<b>2009</b>					
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
<b>2010</b>					
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
<b>2011</b>					
1st Qtr	29.8	10.0	39.8	0.1	39.9
2nd Qtr	107.8	25.7	133.5	28.2	161.7
3rd Qtr	97.3	23.7	121.0	33.4	154.4

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

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

Source: Department of Statistics

growth in sales at apparel stores was due to increased tourist spending and a rise in sales of discounted items. Sales at service stations rose 7.4 per cent due to higher fuel prices during the period. Retailers of building materials recorded a marginal 0.9 per cent rise in sales associated with increased construction activity compared to last year.

Weaker consumer demand for motor vehicles led to a 22.3 per cent drop in sales receipts for motor vehicle dealers. Sales within the all other store types sector, liquor stores and food stores recorded declines of 2.6 per cent, 2.2 per cent, and 1.6 per cent, respectively.

## Imports

Goods valued at \$237 million were imported to the Island during the third quarter of 2011. Total imports fell by 3.6 per cent from \$246 million in the previous. All import commodity groups registered decreases with the exception of miscellaneous items (+2.9 million), transport equipment (+1.5 million) and machinery (+\$298,000).

The largest declines were recorded for imports of chemicals and fuels which contracted by \$4.7 million and \$4.6 million, respectively. Payments for imported basic materials and finished equipment dropped by \$2.2 million

and \$1.8 million, respectively. Imports of clothing and food registered small decreases in value of -\$238,000 and -\$190,000, respectively.

**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>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	2,070	589	20	2,679
<b>2009</b>				
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
<b>2010</b>				
1st Qtr January	1,866	418	19	2,303
2nd Qtr April	1,952	464	19	2,435
3rd Qtr July	2,027	519	19	2,565
4th Qtr October	1,972	480	17	2,469
<b>2011</b>				
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

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>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	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
<b>2009</b>								
1st Qtr	92.9	110.6	81.3	80.9	93.8	83.6	62.4	91.9
2nd Qtr	103.4	121.2	107.6	83.9	109.4	95.2	92.9	101.0
3rd Qtr	105.1	125.2	133.8	87.5	113.6	91.8	84.0	99.4
4th Qtr	107.2	122.7	128.3	75.7	107.3	73.8	119.5	109.0
Year	102.2	119.9	112.8	82.0	106.0	86.1	89.7	100.3
<b>2010</b>								
1st Qtr	90.2	113.7	98.2	80.2	104.7	66.6	58.5	83.5
2nd Qtr	99.1	120.9	108.9	66.2	118.0	70.4	95.6	99.1
3rd Qtr	97.6	124.8	131.0	61.4	114.4	66.5	79.6	95.5
4th Qtr	102.2	122.5	124.1	64.8	109.0	53.8	116.7	104.4
Year <sup>R</sup>	97.3	120.3	115.6	68.2	111.5	64.3	87.6	95.6
<b>2011</b>								
1st Qtr	85.0	110.7	92.7	62.1	106.4	57.0	57.8	80.1
2nd Qtr	96.5	121.0	108.1	55.9	124.2	66.1	95.1	94.4
3rd Qtr	95.8	122.8	128.1	47.7	122.9	67.1	85.1	93.0

1. Quarterly averages derived from monthly series

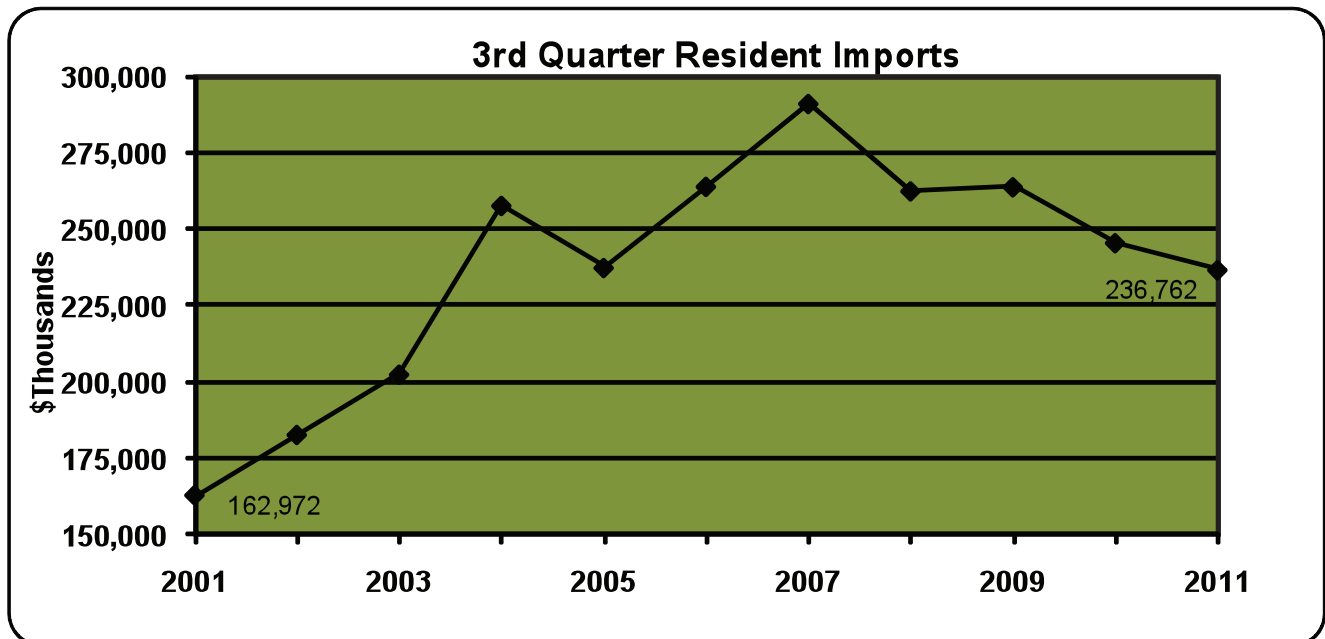
Source: Department of Statistics

**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>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
Year	35,062	6,369	2,869	3,104	2,659	3,239	2,311	1,050	16,810	73,472
<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	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
<b>2010</b>										
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
<b>2011</b>										
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

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>2008</b>					
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
<b>2009</b>					
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
<b>2010</b>					
1st Qtr	20,885	1,063	779	428	23,155
2nd Qtr	61,389	5,895	1,517	569	69,370
3rd Qtr <sup>a</sup>	60,562	6,517	1,559	589	69,227
4th Qtr	36,981	2,296	1,054	515	40,846
Year <sup>a</sup>	179,817	15,771	4,909	2,101	202,598
<b>2011</b>					
1st Qtr	23,602	850	936	479	25,867
2nd Qtr <sup>a</sup>	68,649	4,905	1,416	726	75,696
3rd Qtr	74,865	6,073	1,503	572	83,013

Source: Department of Statistics

**TABLE 8 – IMPORTS BY COMMODITY GROUPS<sup>(1)</sup> \$000 f.o.b.**

	Food Beverages & Tobacco	Clothing	Fuels	Chemicals	Basic Materials & Semi-Mfg	Machinery	Transport Equipment	Finished Equipment	Misc.	Total <sup>2</sup>
<b>2008</b>										
1st Qtr	52,606	7,537	28,097	27,598	27,338	55,585	16,265	92,087	6	307,119
2nd Qtr	49,777	9,318	23,721	25,242	28,005	59,112	17,577	84,550	229	297,531
3rd Qtr	49,788	5,568	29,257	23,884	22,110	53,106	15,072	63,832	1	262,616
4th Qtr	43,853	7,789	21,842	25,894	22,618	52,081	13,032	90,285	366	277,760
Year	196,024	30,212	102,917	102,618	100,071	219,884	61,946	330,754	602	1,145,027
<b>2009</b>										
1st Qtr	42,839	5,719	25,285	23,473	19,787	42,881	11,024	67,418	246	238,672
2nd Qtr	41,296	7,789	26,616	21,381	22,814	52,657	19,912	81,276	11	273,752
3rd Qtr	54,248	6,744	31,129	25,579	20,570	40,834	14,853	69,957	33	263,947
4th Qtr	48,450	6,709	33,119	23,771	19,917	38,380	11,908	92,375	20	274,650
Year	186,833	26,961	116,149	94,204	83,088	174,752	57,697	311,026	310	1,051,021
<b>2010</b>										
1st Qtr	44,118	6,114	25,991	21,829	17,391	46,948	10,393	66,203	–	238,987
2nd Qtr	45,405	6,693	23,515	23,219	18,594	36,381	14,292	80,258	1	248,358
3rd Qtr	44,419	6,767	32,687	26,581	16,267	35,563	7,857	75,484	11	245,636
4th Qtr	39,424	6,514	15,575	25,109	15,499	37,096	9,068	88,015	9	236,309
Year	173,366	26,088	97,768	96,738	67,751	155,988	41,610	309,960	21	969,290
<b>2011</b>										
1st Qtr	38,235	6,338	16,756	23,662	12,652	34,643	7,968	74,717	6	214,977
2nd Qtr	45,234	7,311	18,231	21,572	15,806	34,110	9,040	73,722	486	225,512
3rd Qtr	44,281	6,577	28,112	21,793	14,024	35,861	9,412	73,713	2,989	236,762

1. The above figures have been adjusted to exclude goods not changing ownership

Source: H.M. Customs





### 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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