

# Quarterly Bulletin of Statistics



GOVERNMENT OF BERMUDA  
Cabinet Office  
**Department of Statistics**

**1st Quarter 2007**

## Visitors Arrivals and Expenditure:

### Air Arrivals

Air arrivals during the first quarter of 2007 increased a strong 17.8% compared to the same quarter in 2006. A total of 45,825 tourists visited the Island during the first three months of the year, up from 38,896 in 2006. The increase was contributed mainly to an influx of tourists (+23.2%) from the United States. The visitor count for the United States climbed to 32,946 air passengers compared to 26,732 reported in the same quarter of 2006. Historically, first quarter air arrivals have accounted for less than 15% of total air arrivals in a given year.

The year-over-year number of visitors from Canada remained somewhat static for the quarter dipping slightly by 1.2%. In contrast, the number of air travellers from the United Kingdom and the rest of the world increased 7.3% and 21.4%, respectively.

Air visitors staying at private homes increased 7.5% in the first quarter, a significantly lower growth rate than the 21.1% gain in the total number of air arrivals for all tourist accommodation properties. The number of visitors staying at resort hotels during the first quarter of 2007 jumped 26.0% over the same period in 2006. There were 25,370 tourists who stayed at resort hotels this quarter as opposed to 20,139 visitors in the same quarter of the previous year. Smaller resorts such as small hotels, cottage colonies and clubs experienced an 11.0% increase in visitors, while guest registrations at housekeeping accommodations and guest houses advanced 7.4% and 7.1%, respectively.

### Expenditure by Air Arrivals

Expenditure by tourists arriving by air jumped 21.5% in the first quarter of 2007, reflecting the 17.8% rise in air arrivals. Total outlays were estimated at \$61.5 million, up \$10.9 million from the \$50.6 million reported in the same quarter of 2006.

As a result of the higher number of air visitors to the Island, expenditure on accommodation and food increased a strong 21.8% or by \$8.7 million. Also, spending on shopping, entertainment, transportation, sightseeing and sports activities, rose 20.8% to \$12.8 million.

### Q1 2007 Highlights

**Air** - 45,825 tourists arrived by air and spent \$61.5 million.

**Cruise** - 2,765 cruise ship passengers embarked on Bermuda's ports and spent \$500,000.

**Tourist Accommodations** - Recorded \$42.3 million in sales and employed 2,452 workers of which 63% were Bermudian.

**Resident Trips Abroad** - Bermuda residents took a total of 34,689 overseas trips and declared purchases of \$12.4 million in goods.



## Cruise Arrivals & Expenditure

The number of cruise ship vacationers to the Island during the first quarter of 2007 significantly surpassed the first quarter level reached in 2006. A total of 2,765 cruise ship passengers embarked on Bermuda's ports, compared to the 425 in the same quarter of the previous year. The higher volume of cruise passengers on the Island was attributed directly to the arrival of three cruise ship liners compared to only one arrival in the first quarter of 2006.

Total expenditure by cruise visitors was estimated at \$500,000 compared to the \$100,000 for the same quarter in the previous year.

Despite the additional cruise ship visits, historically, first quarter cruise arrivals have only accounted for less than 1% of total cruise arrivals in a given year.

## Hotel Employment

There were 2,452 employees in the hotel accommodation industry at the end of January 2007. This comprised 1,546 (63%) Bermudian workers and 906 (37%) Non-Bermudian workers. The level of employment in the hotel industry represented an overall decline of 10.2% compared to the same period in 2006. The largest absolute decline in the number of employees was reported for major hotels with 210 fewer workers



Visitor Arrivals							Table 1
	Cruise Passengers	Air Visitors by Country of Origin				Total (1)	Cruise & Air Visitors
		U.S.A.	Canada	U.K.	Other		
<b>2004</b>							
1st Qtr	743	23,692	6,126	3,238	2,016	35,072	35,815
2nd Qtr	76,365	70,009	7,524	6,345	4,796	88,674	165,039
3rd Qtr	101,295	75,303	6,278	6,567	4,074	92,222	193,517
4th Qtr	27,730	40,050	6,564	5,284	3,755	55,653	83,383
<b>Year</b>	<b>206,133</b>	<b>209,054</b>	<b>26,492</b>	<b>21,434</b>	<b>14,641</b>	<b>271,621</b>	<b>477,754</b>
<b>2005</b>							
1st Qtr	497	27,602	5,885	3,763	2,165	39,415	39,912
2nd Qtr	82,773	71,761	8,452	6,832	5,060	92,105	174,878
3rd Qtr	112,027	66,661	6,559	6,431	3,817	83,468	195,495
4th Qtr	51,962	37,973	7,769	5,414	3,424	54,580	106,542
<b>Year</b>	<b>247,259</b>	<b>203,997</b>	<b>28,665</b>	<b>22,440</b>	<b>14,466</b>	<b>269,568</b>	<b>516,827</b>
<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

1. Excludes ship and yacht visitors.

Source: Tourism Department

## Visitors by Intended Type of Accommodation

Table 2

	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>2004</b>							
1st Qtr	15,243	8,246	2,445	497	8,588	53	35,072
2nd Qtr	39,414	22,635	5,519	916	19,925	265	88,674
3rd Qtr	43,103	20,920	5,031	883	21,944	341	92,222
4th Qtr	26,172	12,147	2,596	548	14,049	141	55,653
<b>Year</b>	<b>123,932</b>	<b>63,948</b>	<b>15,591</b>	<b>2,844</b>	<b>64,506</b>	<b>800</b>	<b>271,621</b>
<b>2005</b>							
1st Qtr	19,104	8,178	2,211	445	9,395	82	39,415
2nd Qtr	46,780	20,139	4,035	690	20,273	188	92,105
3rd Qtr	40,730	17,972	4,758	651	19,156	201	83,468
4th Qtr	26,638	11,276	2,676	484	13,350	156	54,580
<b>Year</b>	<b>133,252</b>	<b>57,565</b>	<b>13,680</b>	<b>2,270</b>	<b>62,174</b>	<b>627</b>	<b>269,568</b>
<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

1. This category includes persons staying in commercial accommodation units 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

## Estimated Expenditure of Vacation and Business Visitors \$ Million

Table 3

	Air Visitors			Cruise Visitors	Total Expenditure
	Accommodation and Food	Shopping, Entertainment, Transport, etc.	Total		
<b>2004</b>					
1st Qtr	33.8	10.5	44.3	0.2	44.5
2nd Qtr	85.6	26.4	112.0	18.6	130.6
3rd Qtr	89.0	27.5	116.5	24.7	141.2
4th Qtr	53.7	16.6	70.3	6.8	77.1
<b>Year</b>	<b>262.1</b>	<b>81.0</b>	<b>343.1</b>	<b>50.3</b>	<b>393.4</b>
<b>2005</b>					
1st Qtr <sup>R</sup>	38.7	11.0	49.7	0.1	49.8
2nd Qtr <sup>R</sup>	90.5	25.8	116.3	18.0	134.3
3rd Qtr <sup>R</sup>	82.1	23.4	105.5	24.3	129.8
4th Qtr <sup>R</sup>	53.7	15.3	69.0	11.3	80.3
<b>Year<sup>R</sup></b>	<b>265.0</b>	<b>75.5</b>	<b>340.5</b>	<b>53.7</b>	<b>394.2</b>
<b>2006</b>					
1st Qtr <sup>R</sup>	40.0	10.6	50.6	0.1	50.7
2nd Qtr <sup>R</sup>	104.0	27.5	131.5	23.8	155.3
3rd Qtr <sup>R</sup>	99.5	26.3	125.8	31.9	157.7
4th Qtr <sup>R</sup>	64.1	16.9	81.0	9.5	90.5
<b>Year<sup>R</sup></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	48.7	12.8	61.5	0.5	62.0

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

compared to January 2006. The drop in employment level was due mainly to the long-term closure of one of the Island's larger hotel properties in the Fall of 2006. Cottage colonies and housekeeping units, as well as guest houses and micro-units, also hired fewer workers: 64 and 3 employees, respectively. Employment in this subgroup was adversely impacted by the temporary closure of one of its properties for renovations.

However, major hotels remained the largest employer accounting for 79% or 1,938 workers in the accommodation industry. Cottage colonies and housekeeping units engaged 20% or 498 workers, while guest houses and micro-units continued to employ less than 1% of the workers in the hotel industry.

## Hotel Gross Receipts

Aggregate gross receipts for the hotel industry totalled \$42.3 million in the first quarter of 2007, a significant increase of 30.7% or \$9.9 million more than receipts received during the same period in 2006. Resort hotels accounted for the majority of total sales revenue with a 90.9% share. Small hotels represented 5.3%, a slightly greater share than last year, while cottage colonies accounted for 2.9%.

Monies earned from room sales in resort hotels were the largest contributor accounting for 51.9% of total revenue. The balance of total revenue comprised of restaurant sales (26.6%), alcohol sales in bars and night clubs (9.9%) and other



Employment in Hotel Industry by Type of Establishment<sup>1</sup>

Table 4

		Hotels	Cottage Colonies & Housekeeping	Guest Houses & Micro-Units <sup>2</sup>	All Establishments
<b>2004</b>					
1st Qtr	January	1,328	530	14	1,872
2nd Qtr	April	2,323	600	19	2,942
3rd Qtr	July	2,456	626	19	3,101
4th Qtr	October	2,320	569	16	2,905
<b>2005</b>					
1st Qtr	January	2,253	458	15	2,726
2nd Qtr	April	2,383	677	10	3,070
3rd Qtr	July	2,491	733	16	3,240
4th Qtr	October	2,453	647	14	3,114
<b>2006</b>					
1st Qtr	January <sup>a</sup>	2,148	562	19	2,729
2nd Qtr	April	2,241	652	17	2,910
3rd Qtr	July <sup>a</sup>	2,348	743	16	3,107
4th Qtr	October	2,255	664	17	2,936
<b>2007</b>					
1st Qtr	January	1,938	498	16	2,452

1. As at the end of each reference month.

2. Micro units are establishments having a capacity of 6-11 beds.

Resident Purchases Abroad <sup>1</sup> \$'000										Table 5
	Clothing & Footwear	Electronic & Photographic Equipment	Hhld Items Furniture & Appliances	Toys & Sports Goods	Tapes Records & Compact Discs	Computer Hardware & Software	Jewellery & Watches	Tools Machinery & Parts	Misc.	Total
<b>2004</b>										
1st Qtr	2,881	894	830	361	458	348	196	315	1,240	7,523
2nd Qtr	7,279	952	1,109	637	701	627	403	283	1,931	13,922
3rd Qtr	6,411	1,303	955	613	893	745	426	565	2,520	14,431
4th Qtr	7,922	1,607	662	848	1,173	728	448	640	3,292	17,320
<b>Year</b>	<b>24,493</b>	<b>4,756</b>	<b>3,556</b>	<b>2,459</b>	<b>3,225</b>	<b>2,448</b>	<b>1,473</b>	<b>1,803</b>	<b>8,983</b>	<b>53,196</b>
<b>2005</b>										
1st Qtr	4,728	1,235	593	522	853	594	372	308	2,663	11,868
2nd Qtr	6,941	1,055	654	576	632	515	387	281	3,139	14,180
3rd Qtr	7,171	1,266	787	652	803	663	465	333	3,974	16,114
4th Qtr	8,811	1,667	786	915	963	776	576	304	3,703	18,501
<b>Year</b>	<b>27,651</b>	<b>5,223</b>	<b>2,820</b>	<b>2,665</b>	<b>3,251</b>	<b>2,548</b>	<b>1,800</b>	<b>1,226</b>	<b>13,479</b>	<b>60,663</b>
<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

1. Value of goods as declared to Customs on entry or re-entry to Bermuda. Does not include purchases through mail-order or telemarketing

Source: H.M. Customs

operating revenue (11.6%) such as meeting and banquet room rental sales, equipment rentals, etc. Revenue from hotel rooms at major resorts totalled close to \$20.0 million during the quarter. This was an 18.1% or \$3.1 million increase in comparison to 2006. The higher level of room sales revenue was attributed to the 26.0% increase in the number of visitors staying in major resorts during the quarter.

## Overseas Spending by Residents

Overseas spending levels in the first quarter of 2007 remained fairly stable, as residents declared a total value of \$12.4 million on goods purchased abroad. First quarter spending was 1.1% or \$0.1 million above the level of spending reached in the first quarter of 2006. In comparison, local retail sales in Bermuda rose 5.4% during the same period. The rise in overseas

spending directly reflected an 8.3% increase in the number of resident trips taken abroad. Average spending per resident trip was estimated at \$356.86 in the first quarter of 2007.

There was increased spending for all broad commodity groups in the first quarter with the exception of purchases for electronic and photographic equipment, tapes and compact discs and tools, machinery and parts. Resident outlays on clothing and footwear represented just under half of total overseas purchases in

the first quarter of 2007. The \$5.5 million spent on apparel was 2.1% above the level of spending recorded in the same quarter of 2006. In comparison, Bermuda's clothing retailers registered a 20.0% rise in sales during the same period. Spending on household items, furniture and appliances increased 12.0% to \$634,000. Outlays on computer hardware and software products were up 4.6% or by \$27,000. Spending on jewellery and watches, and miscellaneous goods edged up 0.7% and 2.5%, respectively.

In contrast, there were notable decreases in overseas spending for purchases of tapes and compact discs (-\$56,000), tools, machinery and parts (-\$19,000) and electronic and photographic equipment (-\$82,000).

## Resident Trips Abroad

Bermuda residents took a total of 34,689 overseas trips during the first quarter of 2007. This represented an increase of 2,653 trips and was 8.3% higher than the 32,036 trips taken in the first quarter of 2006. Additionally,

the number of trips taken by residents in the quarter surpassed all other first quarter totals since the initial collection of this data in 1987. The overall growth in overseas travel was characterized by an increase in the number of trips to all country destinations.

The United States was the most popular destination, representing nearly seventy percent of all trips taken by residents in the first quarter of 2007. Total trips to the United States were up 9.1%, representing 1,988 more trips taken when compared to the same quarter of 2006. Trips

Resident Trips Abroad by Purpose and Country of Destination

Table 6

	Purpose of Trip				Country of Destination (1)				Total Trips
	Vacation	Local Business	International Business	Other Reasons	United States	Canada	United Kingdom	All Other Countries	
<b>2004</b>									
1st Qtr	21,854	2,367	2,285	1,493	18,526	3,450	2,859	2,390	27,225
2nd Qtr	30,293	2,680	2,191	2,043	26,654	4,874	3,242	2,803	37,573
3rd Qtr	37,478	2,288	1,833	4,632	31,715	6,372	4,631	3,406	46,124
4th Qtr	36,906	2,271	1,956	3,630	32,777	5,400	3,707	2,811	44,695
<b>Year</b>	<b>126,531</b>	<b>9,606</b>	<b>8,265</b>	<b>11,798</b>	<b>109,672</b>	<b>20,096</b>	<b>14,439</b>	<b>11,410</b>	<b>155,617</b>
<b>2005</b>									
1st Qtr	23,784	2,144	2,022	1,504	20,146	3,478	3,006	2,846	29,454
2nd Qtr	30,666	2,384	2,388	1,706	26,120	4,764	3,304	2,956	37,144
3rd Qtr	41,143	1,939	2,135	2,700	32,432	5,521	5,001	4,963	47,917
4th Qtr	40,345	2,054	2,284	1,877	33,814	5,209	3,706	3,831	46,560
<b>Year</b>	<b>135,938</b>	<b>8,521</b>	<b>8,829</b>	<b>7,787</b>	<b>112,512</b>	<b>18,972</b>	<b>15,017</b>	<b>14,596</b>	<b>161,075</b>
<b>2006</b>									
1st Qtr	24,958	2,329	2,298	2,451	21,939	3,469	3,389	3,239	32,036
2nd Qtr	33,918	2,133	1,594	1,817	27,876	4,578	3,709	3,299	39,462
3rd Qtr	42,675	2,298	1,813	3,239	33,431	6,682	5,228	4,684	50,025
4th Qtr	41,972	2,434	2,411	2,099	35,847	5,116	3,964	3,989	48,916
<b>Year</b>	<b>143,523</b>	<b>9,194</b>	<b>8,116</b>	<b>9,606</b>	<b>119,093</b>	<b>19,845</b>	<b>16,290</b>	<b>15,211</b>	<b>170,439</b>
<b>2007</b>									
1st Qtr	26,676	2,605	2,533	2,875	23,927	3,617	3,510	3,635	34,689

1. Generally taken as the country of initial destination in a multi-country tour; the United States and the United Kingdom are 'gateways' in this regard, and as a consequence they tend to mask tours to South America the Caribbean, Europe and Asia.

Source: Tourism Department

to the United Kingdom and Canada recorded gains of 3.6% and 4.3%, respectively. There was increased activity in resident trips to all other countries by 12.2%, up 396 trips over the same period last year.

Of the 34,689 trips taken by residents during the first quarter, over 75% or 26,676 trips were vacation trips or trips to visit friends and family. This was 6.9% above the 24,958 vacation trips recorded during the same quarter in 2006. Overseas trips taken for local business and international business purposes experienced double-digits gains of 11.9% and

10.2%, respectively. Resident trips for other reasons such as medical and educational related travel were recorded at 2,875. This represented a strong increase of 17.3% compared to the 2,451 trips taken in the first quarter of 2006.



**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.)

**About the Quarterly Bulletin**

The Quarterly Bulletin of Statistics highlights some of the main economic indicators developed by the Department of Statistics. The content and presentation of this publication will vary each quarter depending on topicality and coverage of the published statistics.

A brief analysis of the data for the reference quarter is provided for key sectors of the economy. Additionally, to assess and monitor economic trends, the tables show a series of quarterly figures over a four-year period. The source of data varies for each table.

This publication has been re-vamped and does not contain all the tables that were published in previous Bulletins. However, the data is available and users are encouraged to call the Department to request any information not presented in this report.

**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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# Bermuda's Maritime Connections

May 2007

Department of Statistics

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## Background Information

As an island located 600 hundred miles off the eastern coast of North America, Bermuda has had a varied maritime history ranging from whaling and shipbuilding to sailing, fishing and cruising.

In 1996, the exclusive economic zone around Bermuda was delineated. This gives Bermuda jurisdiction over an area of about 125,000 square nautical miles. This area was declared a marine mammal preserve in 2000. Between 1970 and 2000, Bermuda's protected marine area increased from 39 to 94 square nautical miles.

In support of this year's theme for Heritage Month, "Bermuda's Maritime Connections", the Department of Statistics compiled this fact sheet to highlight our diverse connections to the sea.

## Leading Maritime Occupations

Between 1950 and 2000, fishermen and related workers were one of the leading maritime occupations. In 1980, the number of persons employed in this category peaked at 137 (see Table 1). By 1991, there was a record low of 77 fishermen.

➤ **Fishermen:** A variety of tasks are performed in the catching of fish in inland and coastal waters, such as preparation of tackle and bait and laying fishing lines and nets. In 2005, the median gross annual income for this job was \$53,999.

➤ **Maritime Pilots:** Pilots are responsible for controlling and directing vessels along with supervising the crew. There are three broad types of pilots: tug, ship and ferry/charter. In 2005, the median gross annual income for these occupations ranged from \$41,646 to \$73,713.

In the 2000 census, ferry/charter pilots comprised 77% of the pilot occupational category. At the time of the last census, half of ferry/charter pilots were between the ages of 45 and 64 years and Figure 1 shows these pilots by 10-year age groups.

## Ferry Passengers More than Doubles

The Bermuda ferry service began in the late 1800s as a private company. Between 1960 and 2000, the total number of ferry passengers ranged from 276,000 in 1960 to 609,000 in 1990. Beginning in 1970, the ridership on the Hamilton-Paget-Warwick route declined steadily from 354,000 in 1970 to 164,000 in 1990 (see Figure 2). The reduction in passengers was primarily attributable to the closure of major hotels on Harbour Road. In contrast, the number of passengers on the Hamilton-Somerset route rose from 142,000 in 1970 to 331,000 by 2000.

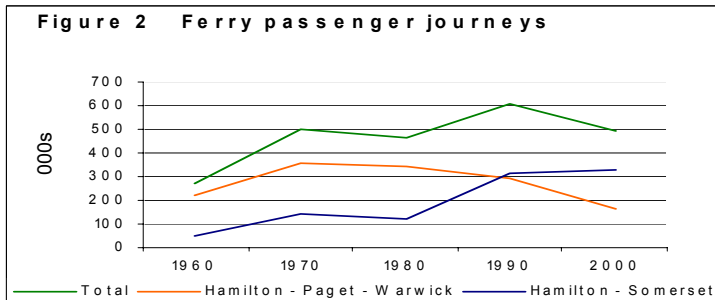


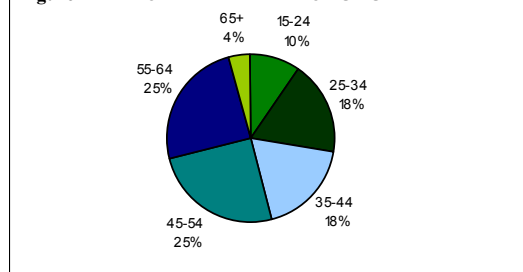
Table 1 Selected maritime occupations

Specific maritime occupation	2000	1991	1980	1970	1960	1950
Total	263	228	241	228	234	397
Fishermen and related workers	85	77	137	100	124	132
Ship's deck mates, officers and pilots	98	81	59	65	54	49
Ship's deck ratings <sup>1</sup>	54	47	33	63	56	103
Ship's engineers	23	21	12	..	..	9
Ship's oilers/greasers	3	2	..	..	..	104

<sup>1</sup>This category includes boatswains, seamen, boatmen and deck hands.  
.. not available

Source: Population Censuses

Figure 1 Ferry/charter pilots by age group



## Tourist Arrivals by Cruise Ship Climb

The steamship, fueled by coal, originated in the 1800s. By the twentieth century, coal was replaced by heavy fuel oil. The increase in fuel costs resulted in the demise of the steamship and the emergence of the cruise ship, which is operated by a turbine diesel engine.

Table 2 Tourist arrivals by sea and type of liner

Year	Steam ship	Cruise ship
1960	11,992	34,900
1970	1,172	86,138
1980	605	117,916
1990	0	112,551
2000	0	209,726
2005	0	247,259

Source: Bermuda Digest of Statistics