

Year-End 2016 Visitor Report

AGENDA

- THE NUMBERS
- THE BRAND
- GROUP SALES
- VISITOR EXPERIENCE

December 2016

12th consecutive month of leisure air
arrival growth

↑ 36%

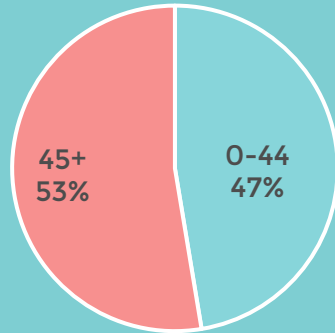
2016

Best performance for leisure air
arrivals since 2007

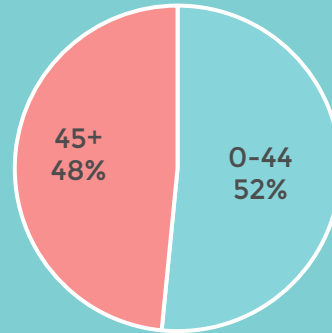
Younger Visitors

More than half of all leisure air arrivals were under 45 years old

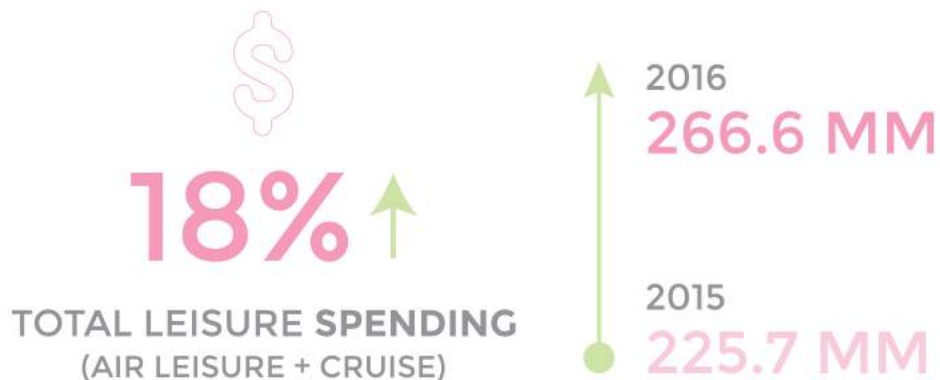
2015 Age



2016 Age



Leisure Visitor Spending (Air & Cruise)



IN MILLIONS	2015	2016	# CHG YOY	% CHG YOY
AIR LEISURE	\$180.2	\$222.1	\$41.8	23.2%
CRUISE	\$45.5	\$44.5	-\$1.0	-2.1%
TOTAL	\$225.7	\$266.6	\$40.9	18%

Air Visitor Arrivals



17%



LEISURE AIR ARRIVALS

	2015	2016	# CHG YOY	% CHG YOY
VACATION & LEISURE	140K	164K	24K	17%
BUSINESS	44K	44K	-480	-1%
VISITING FRIENDS & RELATIVES	32K	32K	600	2%
OTHER	3.6K	3.9K	323	9%
TOTAL AIR VISITORS	219,814	244,491	24,677	11%

Leisure Air Visitor – US Source Market



U.S. LEISURE AIR ARRIVALS

NEW YORK	46% ↑
HARTFORD/NEW HAVEN, CT	27% ↑
WASHINGTON DC	24% ↑
BOSTON	13% ↑
PHILADELPHIA	8% ↑

AIR CAPACITY CHANGES	% CHG YOY
NEW YORK (JFK)	43%

Air Statistics



	2015	2016	# CHG YOY	% CHG YOY
AIR CAPACITY (TOTAL SEATS)	503K	561K	58K	11.5%
ARRIVING PASSENGERS (SEATS SOLD)	372K	406K	33K	8.9%
AIR LOAD FACTOR (% FILLED)	73.9%	72.3%	-1.6%	-2.2%

Leisure Air Visitor - Age



76% 

OF GROWTH IN
LEISURE AIR ARRIVALS
WERE UNDER AGE 45

AGE	2015	2016	# CHG YOY	% CHG YOY
0 - 17	17K	19K	2K	15%
18 - 24	8K	11K	2K	25%
25 - 34	20K	29K	9K	44%
35 - 44	21K	26K	5K	24%
45 - 54	28K	30K	2K	8%
55 - 64	26K	28K	2K	8%
OVER 65	19K	21K	2K	9%
TOTAL	140,087	164,321	24,234	17%

Hotel Performance



	YTD-15	YTD-16	# CHG YOY	% CHG YOY
HOTEL OCCUPANCY	52.6%	57.7%	5.1%	9.7%
HOTEL AVERAGE DAILY RATE (ADR)	-	-	-\$3.85	-1.1%
HOTEL REVENUE PER AVAILABLE ROOM (REVPAR)	-	-	\$15.36	8.4%

Brand Bermuda

TELLING BERMUDA'S STORIES & INFLUENCING
TRAVELERS' DESTINATION DECISIONS

BERMUDAΔ

*To the adventure seekers, explorers,
romantics & originals among us:*

BERMUDA IS SET APART BY ITS LOCATION &
WAY OF LIFE; IT'S WHERE PEOPLE, CULTURES & A
CERTAIN MYSTIQUE SWIRL TOGETHER,
CONNECTING YOU TO A PLACE FAR FROM
YOUR EVERYDAY LIFE.

Targeting Data Driven “Next Gen” Market Segments



**EXPERIENCE
SEEKERS**



GO FOR IT FAMILIES



BUCKET LISTERS



**ADVENTURE
SEEKERS**







out Here

YOU MAY NEVER MAKE IT BACK HOME
THE SAME.

GoToBermuda.com

BERMUDA



out Here

SOME THINGS ARE BETTER EXPERIENCED
THAN EXPLAINED.

GoToBermuda.com

BERMUDA

Sales & Marketing | Return on Investment – Longwood Study

\$1.3

*Million in
Advertising*

24,500

Trips

\$17.1

*Million Spending
On Island*

\$15:1 ROI

Awards & Accolades

“Best Island” Outside Magazine in 2015

“Best Trips” by National Geographic Traveler in 2016

“Top 10 Best Islands” by Conde Nast Traveler in 2016

“50 Best Places to Travel” by Travel + Leisure for 2017

“Top 10 Countries” for travel by Lonely Planet for 2017

“Where to Go in 2017” by Afar

“Best Places to Go” in 2017 by Frommer’s

“Top 5 Places to Travel” in 2017 by Ebony

Home of the 35th America’s Cup, presented by Louis Vuitton in 2017

Outside

NATIONAL
GEOGRAPHIC

TRAVELER

CONDÉ NAST

Traveler

**TRAVEL+
LEISURE**

lonely planet

AFAR

Frommer’s

EBONY

BERMUDA

Group Sales

SOLVING FOR THE SHOULDER SEASON

BERMUDAΔ

86

*Groups &
Meetings*

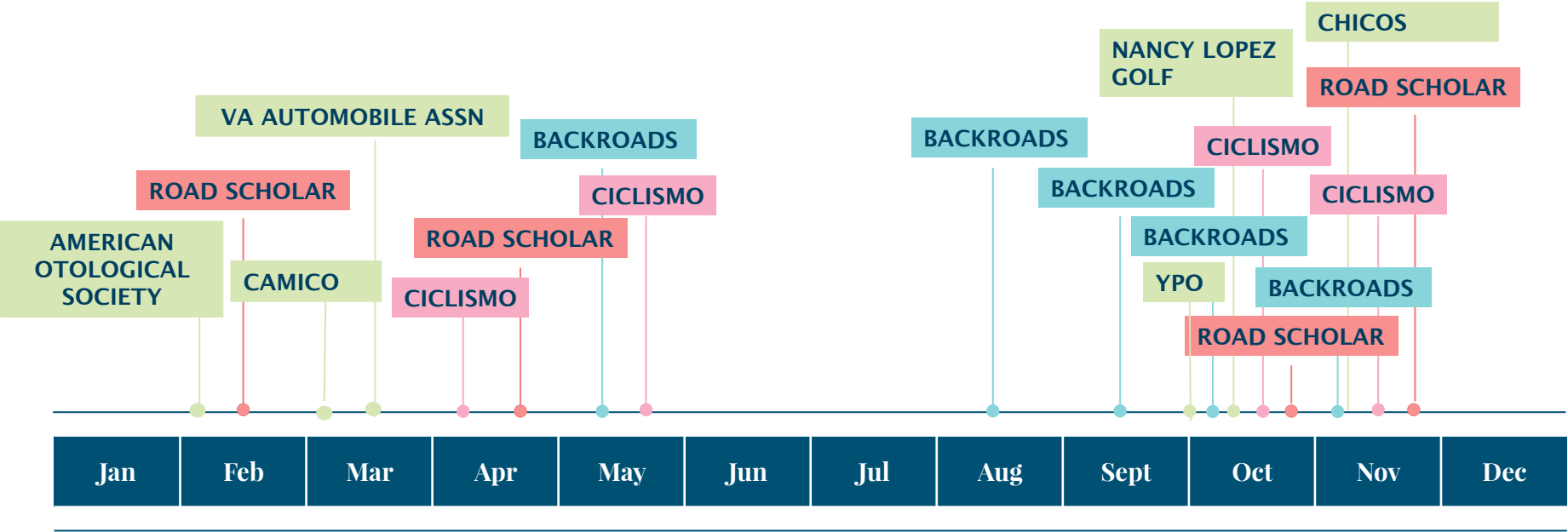
20,500

*Hotel Room
Nights*

\$11.2

*Million Spending
On Island*

Group Business Positively Impacts Shoulder Season



Sports Training Camps



Ariel Re Rugby Sevens



Danish
Swim Team



St. Andrews College

“The New Spring Break”

Attracting Younger Visitors

- Implemented aggressive Sports Tourism strategy to grow visitation in the shoulder season (Nov – Mar)
 - Training camps
 - Sporting events
- Over a dozen sports teams have selected Bermuda for spring training under BTA partnership with National Sports Centre
- Over 3,600 visiting athletes & 19,600 room nights generated from sports in 2016

Building Experiences

SUPPORTING YOU TO MEET THE
EXPECTATIONS OF OUR TARGET VISITOR

BERMUDAΔ

Building Bermuda Experiences

- Over \$607,000 allocated to 38 approved tourism experiences in 2016, under BTA Experiences Investment Process
- Financial support provided for new culinary, heritage and water sport activities
- Since 2014, approximately \$3 million has been allocated to local entrepreneurs & businesses under this initiative

Diverse Array of Experiences for Today's Experiential Bermuda Visitor

- Highlights in 2016:
 - Culture & Heritage Experiences
 - Sport & Adventure Experiences
 - Culinary Experiences
 - Nautical Events

Cultural Experiences



Bermuda Heroes' Weekend



Bermuda Performing Arts Festival



BERMUDA

EMERGING SPORTS TOURISM DESTINATION

- RC44 BERMUDA CUP
- M32 BERMUDA SERIES
- DANISH NATIONAL SWIM TEAM
- GREY GOOSE WORLD PAR 3
- ARIEL RE BERMUDA RUGBY 7s
- GOUCHER WOMEN'S SOCCER
- TRIANGLE CUP YOUTH SOCCER
- SWIM-MAC OLYMPIC TRAINING CAMP
- BERMUDA TRIPLE CHALLENGE
- BERMUDA MARATHON WEEKEND

Sport & Adventure Experiences

BERMUDA

Culinary Experiences



BERMUDA
FOOD TRUCK
Festival

October 9, 2016
1 pm - 6 pm
1 Car Park, Front Street Hamilton

Celebrate the island's best entertainers and food served on four wheels at Bermuda's first Food Truck Festival!

.....

Your "Greeze" on Wheels Guide

Greeze (ˈɡriːz) noun
A Bermudian word to describe a big meal or delicious spread.

Enter to **WIN PRIZES** by simply spending \$15 at:

Keith's Kitchen	Scoops n Cones Ice Cream Truck
Ginger Beer Truck	AAA Hot Dog Cart
Stevens Lunch Wagon	Jor-Jay's Lunch Wagon
DeGraffs Lunch Counter	Bermuda Cupcake Company Snowball Shack
Cann-Da-Licious	Smokin Barrel
Ashley's Lemonade Stand	Dandy Donuts
Hotdog Delight	Twisted Spoon
Duch Pops	Bite&M
Entertainment Line up	
Walking Tiki	The Strong Brothers
Kumal Boys	Robert A. Sambo
In Motion Dance	Soca Powder Hour by DJ Dally G

For more information on Bermuda's Food Truck Festival 2016
visit Cotobermuda.com or contact 441-296-9200

BERMUDA
TOURISM AUTHORITY

f t i



2016 Restaurant Weeks

JANUARY 14 - FEBRUARY 5

BERMUDA

Nautical Events




BERMUDA 44
www.bermuda44.com

Photo ©Martinez Studio
RC44 Class

RC 44 Series

BERMUDA

Executive Summary

2016



17% ↑

LEISURE AIR ARRIVALS



11% ↑

AIR CAPACITY



18% ↑

TOTAL LEISURE SPENDING
(AIR LEISURE + CRUISE)



76% ↑

OF GROWTH IN
LEISURE AIR ARRIVALS
WERE UNDER AGE 45



U.S. LEISURE AIR ARRIVALS

NEW YORK	46% ↑
HARTFORD/NEW HAVEN, CT	27% ↑
WASHINGTON DC	24% ↑
BOSTON	13% ↑
PHILADELPHIA	8% ↑



2016
266.6 MM



2015
225.7 MM

PERCENTAGES ARE %
CHANGE COMPARING
2015 AND 2016



10% ↑

HOTEL OCCUPANCY

BERMUDA
TOURISM AUTHORITY