



BERMUDA
— AGILITY —

National
Tourism Plan

— 2019-2025 —

BERMUDA

A Message from the Minister of Tourism & Transport



In our 2017 General Election Platform, the PLP gave a commitment to modernise the National Tourism Plan so that it better reflects the realities of today's evolving tourism market.

The new plan was created recognising the increasingly

competitive and complex tourism market in which Bermuda competes. It is essential that Bermuda does not stand still to reflect on recent growth and successes in the tourism sector. Now is the time to act if we are to stay ahead of our competitors.

More than anything else, the National Tourism Plan focusses on the need to modernise and be adaptable to change. Of course, this means that constant change now becomes the norm, and as we all know, there can be significant inertia to change. However, we must overcome any impediments to innovation and embrace a new mind-set of change that will elevate entrepreneurs and increase tourism's attractiveness to our young people when they seek careers. The necessity for agility cannot be stressed enough.

I invite you to join with the Bermuda Tourism Authority and the Government of Bermuda as we embark on this journey towards a more developed and progressive tourism industry.

Sincerely,



The Hon. Zane DeSilva, JP, MP
Minister of Tourism & Transport

A Message From the Bermuda Tourism Authority CEO



As we share the National Tourism Plan (NTP) with you, I'm most proud of the collaborative approach we took to complete the work.

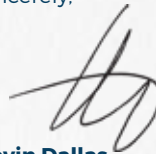
Hundreds of stakeholders

participated in interviews and working groups and nearly 800 members of the public weighed in via survey. This National Tourism Plan is therefore not just the Bermuda Tourism Authority's plan, but Bermuda's plan. And that's the way it should be; in fact, it's the way it must be if the plan is to be successful.

After two-plus years of strong growth in the tourism industry, we recognise that maintaining this trajectory may not be easy. It requires focus, creativity, passion and, of course, agility. I'm convinced we have a plan that harnesses these traits among our residents and partners and guides Bermuda and her people to greater tourism success and prosperity in a balanced, sustainable way.

The team at the BTA looks forward to working with partners in the public and private sectors to take Bermuda's tourism economy to the NEXT LEVEL.

Sincerely,



Kevin Dallas
Chief Executive Officer

National Tourism Plan: *Goals & Objectives*

Objectives

Create a six year tourism plan to 2025

Build a clear view of our aspirational future for tourism and its effect on the island as a whole

Vision

Bermuda will have a growing and balanced tourism sector. This means we will grow tourism, and at the same time ensure:

- ▶ Better balanced seasonality
- ▶ Better balanced price-value perceptions
- ▶ Better balanced visitor volume – air vs. cruise
- ▶ Better balanced benefits for all residents of Bermuda

Mission

The National Tourism Plan (NTP) will enable, or be the catalyst for, changes that boost the tourism sector. To do this, the NTP will:

- ▶ Work with all relevant stakeholders to ensure their voices are heard
 - ▶ Focus on the things that matter
 - ▶ Help bring about change in a sustainable way
- ▶ Help foster cooperation vs. competition island-wide
 - ▶ Be visitor-centric in our approach


U.S. Visitor Targets



Savvy
ITY
WELLER
ESCAPE
Indulgent
Experience
Educated
ENTHUSIAST
DWELLER
CITY
Indulgent
ESCAPE
culturö

WHO ARE THEY?

• 24-44 • HH \$100K+ • COUPLES • 6+ TRIPS/YEAR



TECHIE *EDGY* **AMBITIOUS**
DCY **ADVENTURE** *EDGY*
SEEKER *TECHI*
DIVERSE
URBANITES **FIT** *Stylish*

WHO ARE THEY?

• 18-34 • HH \$100K+ • SINGLES • 4+ TRIPS/YEAR

Must Win

EXPERIENCE ENTHUSIAST & ADVENTURE SEEKER

- We are currently attracting more of these groups; product can meet their needs year-round
- They are in pre-family stage; could represent future Active Family travel
- These segments are main focus for marketing and development purposes
- Mini segments: African Americans, Babymooners

Bermuda is an alluring destination that attracts many people – but we can't appeal to everyone.

We need to focus our resources on particular targets or segments. These segments* were chosen based on a number of factors, including segment size, spending and projected growth in the next six years; current visitors to Bermuda; suitability of our offering and other factors. Focusing on these targets means that we should concentrate our resources and efforts – be they marketing, product development, hospitality services or experiences – on these segments. This doesn't mean we forget about other groups; rather, we choose to focus on these four segments as they represent the biggest potential for Bermuda's tourism growth.



badge-worthy experiences prestigious
 experiences **JETSETTER** Luxury
 usive Luxury badge-worthy Exclusive
 experiences prestig

WHO ARE THEY?
 • 30+ • HH \$250K+ • 6+ TRIPS/YEAR



GANIZED SPORTY ORGANIZED
 Active **ACTIVE** Bonding
 URBAN FAMILIES
 SUBURBANITES SPORTY ORGANIZED

WHO ARE THEY?
 • 35-54 • HH \$160K+ • CHILDREN UNDER 18 • 6-7 TRIPS/YEAR

Must Have

JETSETTER

- Important part of current visitor arrivals – high spenders
- Most resistant to economic downturns
- Product exists but needs to be improved to truly appeal to this audience
- Mini segments: Yachting, Destination Weddings

Invest in the Future

ACTIVE FAMILIES

- Most Active Families are millennials so this group is likely to grow in the next five years
- Our product is not where it should be today; we need to consider how to develop products and services to better meet the needs of this segment

*Segments differ in the U.K. and Canada.

Visitor Need States

**To succeed in a more competitive and fast-moving world,
we need to think like a visitor.**

We conducted research among more than 2,000 people across the U.S., Canada and the U.K. to understand why, where and how they travel for leisure. We found that while there are some differences between short (4 nights or less) and long vacations, people tend to take vacations for four major reasons – or “need states.” These need states may vary by segment and/or by the time of year. By understanding these need states in more detail, we can develop more relevant and appealing products, services, packages and marketing messages.

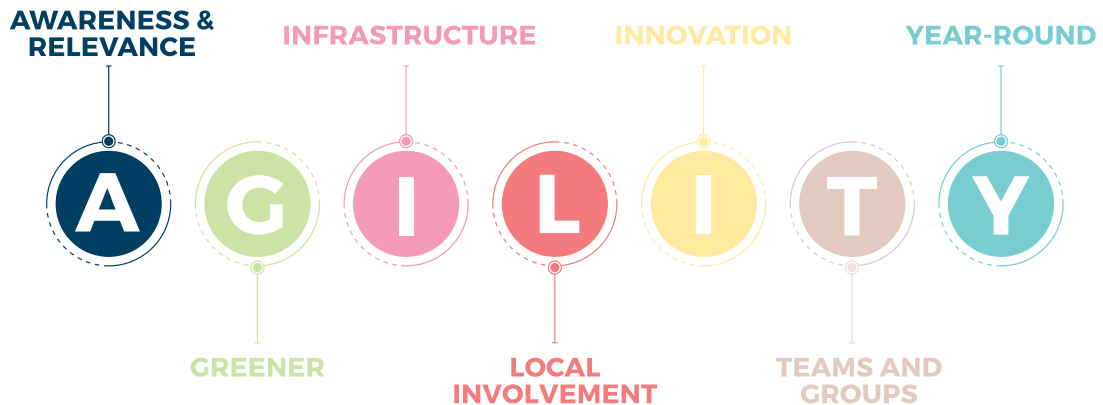
	<i>Getaway</i>	<i>Family Fun & Bonding</i>	<i>Adult/Couples Retreat</i>	<i>Seeking Experiences</i>
Most important needs	<ul style="list-style-type: none"> Re-energise Relieve stress Break up the routine Get away from it all 	<ul style="list-style-type: none"> Travel with family Visit friends/family Create memories Outdoor experiences 	<ul style="list-style-type: none"> Better weather Romantic getaway Revisit a destination Travel deals 	<ul style="list-style-type: none"> New places/adventures Broaden horizons Different cultures Historic locations
How Bermuda delivers on those needs	<ul style="list-style-type: none"> Experience a different world without going far. Relax and unwind any way you want. 	<ul style="list-style-type: none"> Unique activities for all ages, on land and water. A safe, family-friendly place to make memories. 	<ul style="list-style-type: none"> An intimate escape where anything can happen. A place made for unforgettable moments. 	<ul style="list-style-type: none"> A trip full of culture and adventure. A rich and diverse history offers unique, memorable experiences.
Segments most appealed to	<ul style="list-style-type: none"> Jetsetters Experience Enthusiasts 	<ul style="list-style-type: none"> Active Families Jetsetters 	<ul style="list-style-type: none"> Experience Enthusiasts Jetsetters Active Families (weekend without kids) 	<ul style="list-style-type: none"> Experience Enthusiasts Adventure Seekers Jetsetters Active Families

Roadmap *for Success*

The history of Bermuda is one of constant innovation and change.

From farming to shipbuilding to military bases to tourism to financial services, Bermuda has shown an uncanny ability to adapt with the times. Change is inherent in the DNA of our country. The concept of AGILITY can harness this energy and guide us to collectively focus our efforts.

The Seven Pillars of the National Tourism Plan



In a world where change is happening faster than ever, and where standing still effectively means moving backwards, we need to draw on this ability to change in order to grow as an appealing destination. It is this agility that will enable us to differentiate ourselves from other destinations, offer relevant products and services and create new, distinctly Bermudian experiences.

Our National Tourism Plan depends on our agility and highlights the need to change in

almost every aspect of how we attract, service and delight our visitors. We've therefore based our seven core pillars around the notion of AGILITY. Each pillar deals with a specific aspect of tourism that needs to evolve. In some cases, the change is small; in others it requires a dramatic shift. Some stakeholders may find themselves focusing on one pillar; many will need to address some aspect of all seven. Whatever your focus, it is critical to examine the strategies and tactics to understand your role in effecting the change we need to succeed.

THE ABILITY TO *transform ourselves* SPEAKS TO OUR CREATIVITY, PASSION AND, PERHAPS MOST IMPORTANTLY, *our agility*.

A

Awareness & Relevance

Inspiring people with the allure of Bermuda

While many people have heard of Bermuda, relatively few know what makes us original so they choose to go elsewhere. We must focus our resources to make the right audiences more familiar with Bermuda and break through the 'noise' of other destinations.



The Opportunity:

By 2025, Bermuda will be seen by our target visitors as an alluring destination set apart not only by our geographic location but also our way of life.

How will we measure our success?

- ▶ Increase familiarity among our target visitors
- ▶ Improved perceptions; prospective visitors should see Bermuda as:
 - A year-round destination tied to its attitude rather than merely its assets
 - An island set apart by its location and way of life
 - A destination that is full of adventure and mystique

How will we effect change?

What we will do:

- ▶ **Further integrate our communications efforts as much as possible**
- ▶ **Focus on reaching the right traveller (from our target cities) at the right time with the right messages** – and so establish an emotional connection between our target visitors and Bermuda

- ▶ **Use communications as a tool to balance seasonality** by developing programs/offers for the right target + need state + season to boost year-round travel
- ▶ **Look to new technologies** that leverage data and insights to enhance our marketing efforts and visitor experiences
- ▶ **Enable industry partners** with enhanced digital tools and training to create a larger digital footprint for Bermuda

What we won't do:

- ▶ Spend resources on consumers and in cities not within our target scope
- ▶ Spend resources on messages that are off-brand

Questions to answer

- ▶ Am I focusing on the right target audiences and their key need states?
- ▶ How can I spread the word about Bermuda through social (or other) media?
- ▶ What do my messages convey about Bermuda?



Greener

Growing by being Pink, Blue and Greener

Paying attention to our environment is not only good for Bermuda in general, it is good for business. Eco-tourism is a fast-growing trend and our clean ocean and beaches and healthy reef provide important draws for visitors. However, we can do better – and become greener.



The Opportunity:

By 2025, Bermuda will be on the road to becoming one of the 'greenest' tourist destinations, and will attract visitors who value this through more eco-friendly practices and better use of its natural resources.

How will we measure our success?

- ▶ Bermuda should be perceived by its target segments as being:
 - An eco-friendly destination to visit
 - Clean and pollution/litter-free
- ▶ Visitor-related transportation (e.g. taxis, rental cars, buses, etc.) will gradually switch to greener alternatives

How will we effect change?

What we will do:

- ▶ **Electric vehicles** – consider how to promote the use of electric vehicles as visitor transportation
- ▶ **Promote our unique natural assets** – notably, the Railway Trail, our ocean resources and natural parks/beaches
- ▶ **Beach economy** – add sustainability to the goals of the beach economy

- ▶ **Greener hospitality** – the hospitality industry should explore ways to reduce waste and its carbon footprint and, at the same time, reduce costs
- ▶ **Promote sustainable activities** on and in our oceans, such as scuba, fishing, etc.
- ▶ **Work with environmental groups** to enhance environmental practices and new ideas

What we won't do:

- ▶ Disrupt environmentally sensitive areas on land and offshore or engage in any activity that has negative impact on our reef
- ▶ Initiate activities that lead to overcrowding of beaches
- ▶ Support businesses and regulation that are detrimental to the environment

Questions to answer

- ▶ How can I make my business or organisation greener?
- ▶ In what ways can we, as a country, better utilise and promote our amazing natural assets to visitors in a sustainable way?
- ▶ What activities should we stop/curtail that are detrimental to our environment?



Infrastructure

Building frictionless experiences from arrival to departure

A healthy tourism industry relies on a solid infrastructure to enable us to deliver our distinct experiences to our visitors. While our infrastructure is generally good, there are important ways it needs to be upgraded, most notably in transportation, the waterfront (Hamilton, St. George), utility costs, technology, shopping/retail and accessibility for disabled visitors and residents. In addition, the myriad laws and regulations governing our industry should be simplified and updated.



The Opportunity:

By 2025, Bermuda will offer frictionless experiences from arrival through departure in a way that not only satisfies visitors but adds to their positive experience of our country.

How will we measure our success?

Visitor satisfaction with elements such as:

- ▶ Quality of transportation
- ▶ Airport experience
- ▶ Accessibility
- ▶ Shopping

How will we effect change?

What we will do:

- ▶ **Arrival/departure experience** – develop a frictionless experience at the new airport
- ▶ **Transportation** – offerings need to be more visitor-friendly and technologically relevant while providing viable alternatives and creating new opportunities for all stakeholders
- ▶ **Accessibility** – ease of use for disabled/mobility-impaired visitors and residents must be improved, especially for cruise passengers

- ▶ **The waterfronts** – Hamilton and St. George are significantly underutilised. A new plan should be developed to revitalise these waterfronts.
- ▶ **Tourism-related regulations** – many are out of date and can be needlessly onerous; these laws should be simplified and modernised
- ▶ **Vacation rentals** – owners should organise to develop self-regulation with regard to minimum standards offered to visitors

What we won't do:

- ▶ Our improvements will not change the distinct atmosphere and nature of the Bermuda experience that draws visitors
- ▶ Increase traffic and inconvenience Bermuda residents
- ▶ Compromise on safety and our reputation as a safe, clean destination

Questions to answer

- ▶ How can I offer visitors a more 'frictionless' experience on island?
- ▶ How can I make my organisation more accessible to disabled travellers?
- ▶ How can we, as an industry, work together with government to enhance our infrastructure?

L

Local Involvement

Growing through Our People

Tourism in Bermuda can only grow through and with the support of its residents. Visitors to the island cite interactions with locals as one of the best parts of their trip. Yet many young Bermudians currently don't see tourism as an appealing career. And many locals do not yet view tourism as vital to our economy. As the largest private sector employer in Bermuda, and a proven growth engine, we need to change these perceptions and engage all residents in the tourism industry.



The Opportunity:

By 2025, Bermuda will effectively tap the vast creative and entrepreneurial potential and hospitality of its local residents so that both visitors and residents benefit from these interactions.

How will we measure our success?

- ▶ Visitors should be satisfied with their interactions with locals
- ▶ Bermuda residents should see tourism as an attractive career and as an important part of the future of Bermuda's growth

How will we effect change?

What we will do:

- ▶ **Demonstrate how tourism** can be a multi-faceted career by, among other things, making it relevant to school-aged children
- ▶ **Align around service standards** – employees in tourism and related industries should feel aligned with the goal of increasing tourism via offering exceptional service

- ▶ **Tapping the hospitality of Bermudians** – seek more ways for locals to interact with visitors; prepare and encourage locals to be tourism ambassadors
- ▶ **Community outreach** – it is imperative that all parts of the community believe in the importance of tourism and its ability to effect positive change for all residents

What we won't do:

- ▶ Portray tourism as limited in terms of career prospects
- ▶ Ignore the voices of our communities when it comes to tourism development

Questions to answer

- ▶ How can I encourage young Bermudians to consider tourism as an appealing career?
- ▶ How can I encourage more interactions between visitors and locals?
- ▶ How do I enhance service standards in my organisation (e.g. via CTA or NSSP designation)?



Innovation

Thinking like a visitor

The world of travel is shifting quickly and it's critical that we keep up with new developments in travel and tourism, and meet the evolving needs of our target visitors. This means that we need to promote an entrepreneurial culture, utilise technology and data in new ways and, perhaps most importantly, 'think like a visitor' as we develop new products, services and experiences.



The Opportunity:

The Bermuda Tourism Industry will have a **visitor-centric** approach and will utilise technology and data to enhance visitor experiences.

How will we measure our success?

- ▶ **Visitors should** agree that packages, experiences and products/services are designed around their needs
- ▶ **Non-visitors should** believe that there is "a lot to do for people like me in Bermuda"

How will we effect change?

What we will do:

- ▶ **Think like a visitor** – encourage demand-side thinking via training and dissemination of information around our target audiences, their need states and what they are looking for in Bermuda
- ▶ **Set up an incubator** to help local entrepreneurs establish their businesses
- ▶ **Introduce a central portal** for all activities and events
- ▶ **Make better use of data on our visitors** – ideally we capture visitor data ahead of their

arrival so we can suggest activities or experiences based on their needs

- ▶ **Drive investment in specific areas** that fulfill target + need state + season combinations. Special attention will be paid to investing in experiences (e.g. Cultural Tourism) that meet the need states of our target audiences and that generate a strong return on investment
- ▶ **Development of African Diaspora Heritage Experience (ADHE)** – work should be done to enhance the African Diaspora Heritage Trail into a culturally rich and memorable experience

What we won't do:

- ▶ Focus on supply-side thinking – we must think like a visitor!
- ▶ Consider technology for technology's sake – it should always improve the visitor's experience
- ▶ Invest in speculative technology in areas where proven solutions already have traction

Questions to answer

- ▶ What unique products, services or experiences can I develop based on the need states of our target audiences?
- ▶ How can I participate in a central event portal so that my business is featured?
- ▶ How can I help Bermudian entrepreneurs develop sustainable businesses?

T

Teams & Groups

Designing distinct positioning for groups

MICE (Meeting, Incentive, Conferences and Exhibitions), sports teams and events are an important source of visitors throughout the entire year, not only contributing economic impact to Bermuda but also Bermuda's profile. While we have excellent facilities for certain sports and meetings, we have the opportunity to offer a more seamless experience for organisers, leveraging new trends and technology to meet the expectations of participants and meeting planners.



The Opportunity:

Bermuda will become known as an exclusive, convenient and sought-after destination for specific groups – especially in the non-summer months.

How will we measure our success?

- ▶ We will grow the percentage of group business from ~25% of room nights to >30% of room nights by lifting group business in the slower months (not cannibalising current airlift)

How will we effect change?

What we will do:

- ▶ **Develop a positioning (Unique Selling Proposition)** for groups
- ▶ **Segment and identify the prime prospects for our groups business** and focus on these
- ▶ **Better coordination** – there is scope for better coordination between different organisations in the MICE market
- ▶ **Technology and production** – there is a need for increased expertise and/or competition

among technical and/or production providers to ensure availability of up-to-date inventory

- ▶ **Focus on key sports** – focus on attracting a number of sports teams/events that are ideally suited for Bermuda and work with relevant government and non-government organisations to ensure our facilities meet the needs of these sports and are regarded as world-class

- ▶ **Transport** – there is a need to improve group transport to ensure seamless mobility around the island

What we won't do:

- ▶ Go after groups or sports teams that are not a good fit for Bermuda, logistically or seasonally

Questions to answer

- ▶ How can my business enhance the experience of groups and/or sports teams?
- ▶ How can we, as an industry, work together to offer a better experience for groups that is collaborative and coordinated?



Year-Round

Embracing all seasons

Bermuda's seasonality places significant stress on the island and tourism-related businesses that have to contend with massive ebbs and flows. Cruise ships, while important to Bermuda's tourism industry, contribute to this seasonality. We also often apologise for our non-summer months but generally our weather is enjoyable year-round, especially to visitors from the northeastern U.S. and Canada.



The Opportunity:

By 2025 Bermuda will offer an attractive value proposition for visitors to come any time of year.

How will we measure our success?

More than 56 percent of our arrivals will come from the non-summer months (Sept-May); currently, they make up 52 percent.

How will we effect change?

What we will do:

- ▶ **Redefine our seasons** – everyone in the tourism industry should be working off the same calendar
- ▶ **Relevant packages should be developed** for the right audience-need state combinations depending on the season

- ▶ **Cruises** – will remain an integral part of tourism in Bermuda, but should be managed carefully to encourage quality over quantity, greater use of ports in Hamilton and St. George and an extended cruise season – ideally from April through December
- ▶ **Yachting** – promote Bermuda as a stopover port in the spring and fall for yachts and superyachts; in particular, allowing for superyacht chartering as a stimulus for small businesses
- ▶ **Event Authority** – collaborate with the new Event Authority to develop significant events for Bermuda in the non-summer months

What we won't do:

- ▶ Create new, large events in peak season
- ▶ Give cruise partners preferred access to our docks if they don't commit to using them outside summer months

Questions to answer

- ▶ How can my organisation offer products, services and experiences in the non-summer months? This could also include discounts and specials.

	FAMILY FUN & BONDING	GETAWAY	ADULTS/COUPLES RETREAT	SEEKING EXPERIENCES
WARM WINTER JAN, FEB, MAR	● ¹	●	●	● ²
SPRING APR, MAY	○	●	●	●
SUMMER JUN, JUL, AUG	●	●	○	●
FALL SEP, OCT, NOV, DEC	○	●	●	●

1. Winter/spring break 2. Different experiences per season

● IDEAL ● POSSIBLE ○ UNLIKELY

National Tourism Plan *on a page*

NTP Objective:	<ul style="list-style-type: none"> Build a clear view of our aspirational future for tourism and its effect on the island as a whole
NTP Vision:	<ul style="list-style-type: none"> Bermuda will have a growing and balanced tourism business by 2025 The NTP will enable, or be the catalyst for, change to boost the tourism industry

Success Indicators. By 2025...

Tourism will contribute \$1.2bn to the GDP (Avg. 4.5% leisure visitor growth pa)	30% of visitors in the summer will come from airlift (25% in 2016/17)	>56% of leisure arrivals will be in non-summer (Sep-May) (52% in 2017)	>8% of leisure air arrivals will be African American (4% in 2017/18)	>83% would definitely recommend Bermuda to friends/family (76% in 2018)	>70% of residents will support development of tourism in Bermuda (61% in 2018)
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Cities	FOCUS: New York City, Boston, Washington, DC, Philadelphia, Toronto
	NURTURE: Baltimore, Hartford, Atlanta, Chicago, Dallas, San Francisco

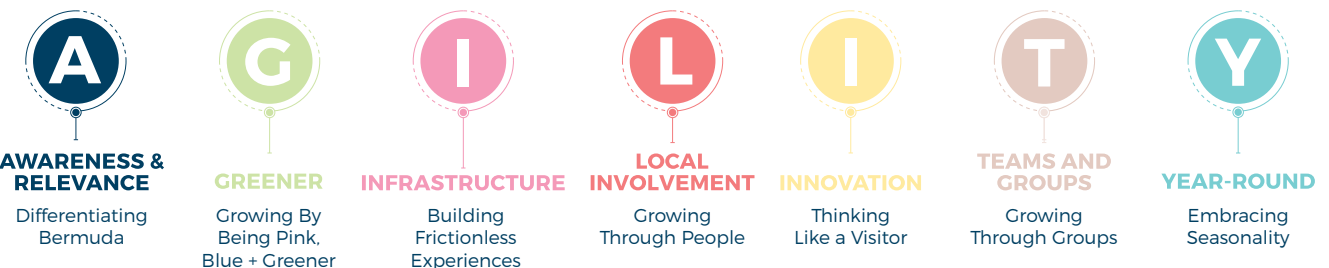
Target Visitors



Need States

<i>Seeking Experiences</i>	<i>Adult/Couples Retreat</i>	<i>Family Fun & Bonding</i>	<i>Getaway</i>
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Strategic Pillars





THE ABILITY TO
transform
ourselves

SPEAKS TO OUR CREATIVITY,
PASSION AND, PERHAPS
MOST IMPORTANTLY,
our agility.

BERMUDA
TOURISM AUTHORITY

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Created under the auspices of the Bermuda Tourism Authority

The BTA acknowledges the contribution and time spent by hundreds of residents, business owners, government officials, non-government organisations and others in helping the creation of this plan