



AGENDA

1. Minister's Welcome
2. Tourism Outlook Presentation
3. Panel Discussion
 - i. Moderator Questions
 - ii. Audience Questions

2019 Bermuda Tourism Outlook

OPPORTUNITIES & CHALLENGES

BERMUDAΔ

Executive Summary 2018 vs 2015

PERCENTAGES ARE % CHANGE COMPARING 2015 AND 2018



46% ↑

LEISURE AIR **ARRIVALS**



21% ↑

AIR CAPACITY



67% ↑

LEISURE AIR **SPENDING**



73%

OF GROWTH IN LEISURE
AIR ARRIVALS CAME
FROM VISITORS UNDER
AGE 45



LEISURE AIR **ARRIVALS**

BOSTON

69% ↑

NEW YORK

59% ↑

WASHINGTON DC

44% ↑

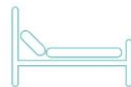
TORONTO

30% ↑



28% ↑

CRUISE ARRIVALS



21% ↑

HOTEL OCCUPANCY

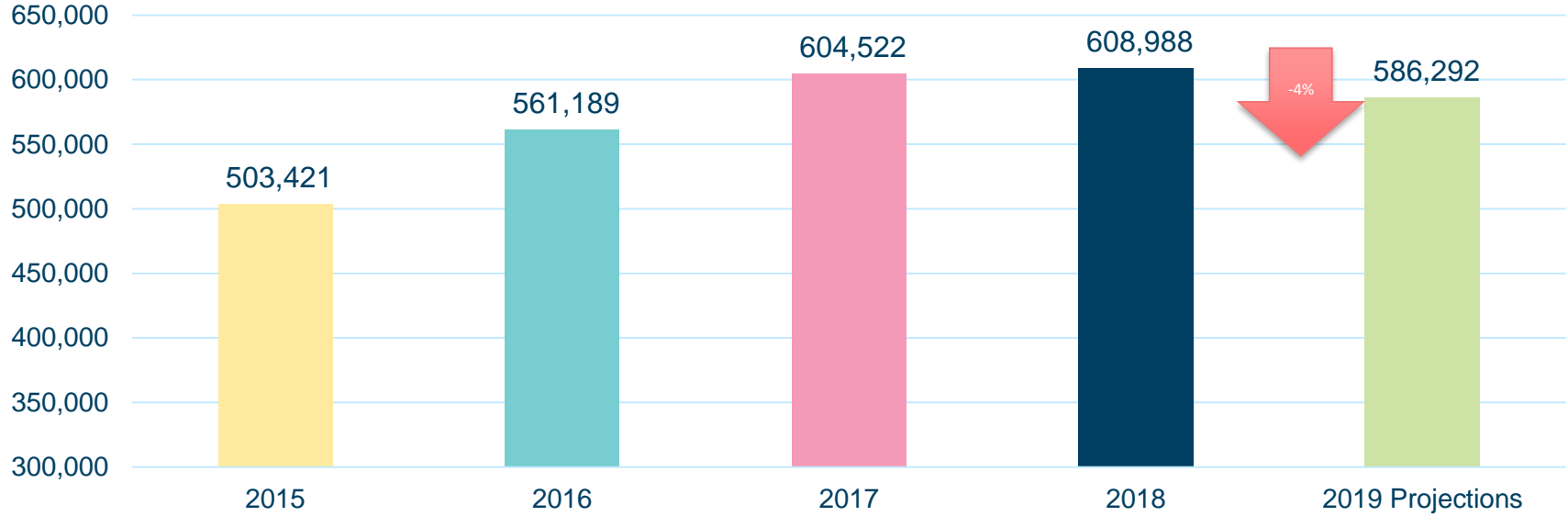
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Airlift & Cruise Calls

FORECASTS FOR THE YEAR

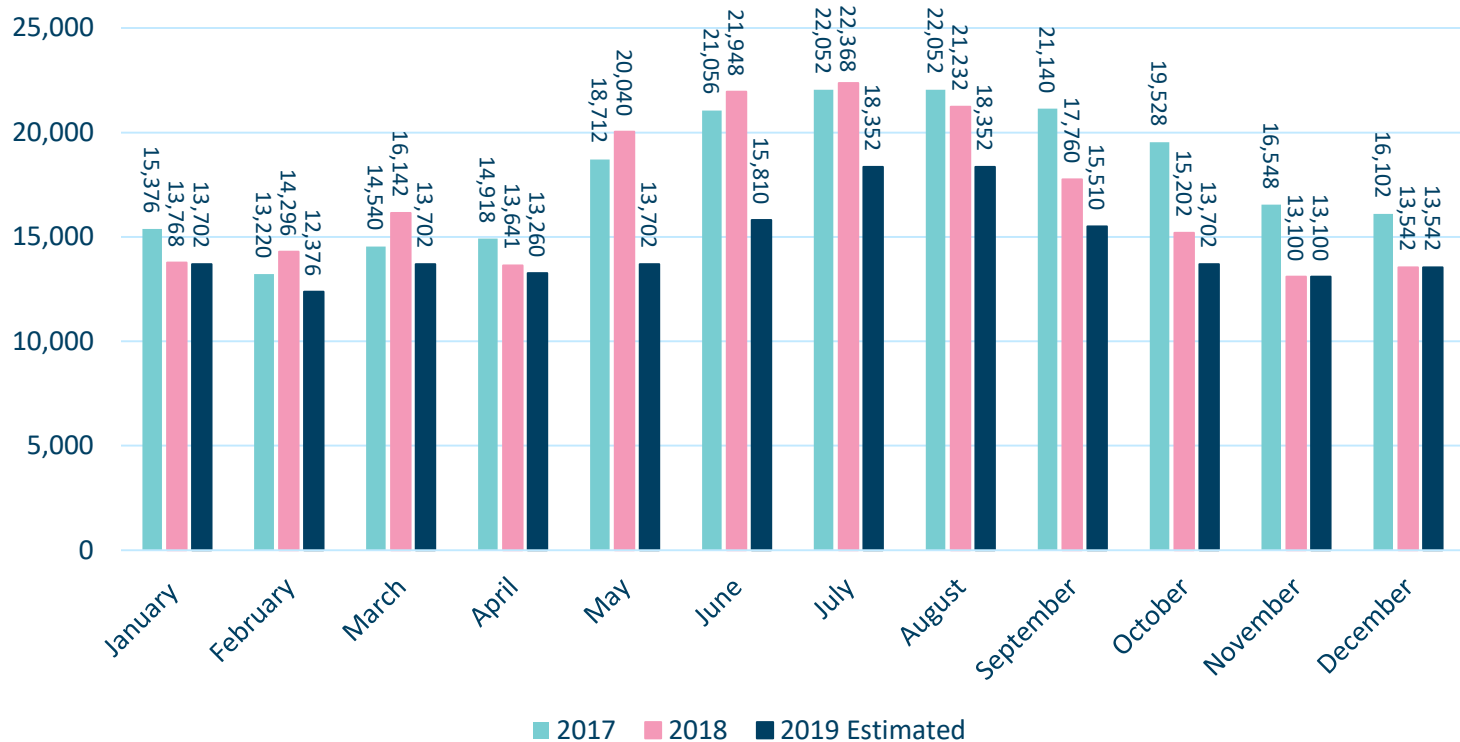
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Air Capacity





JFK Air Capacity



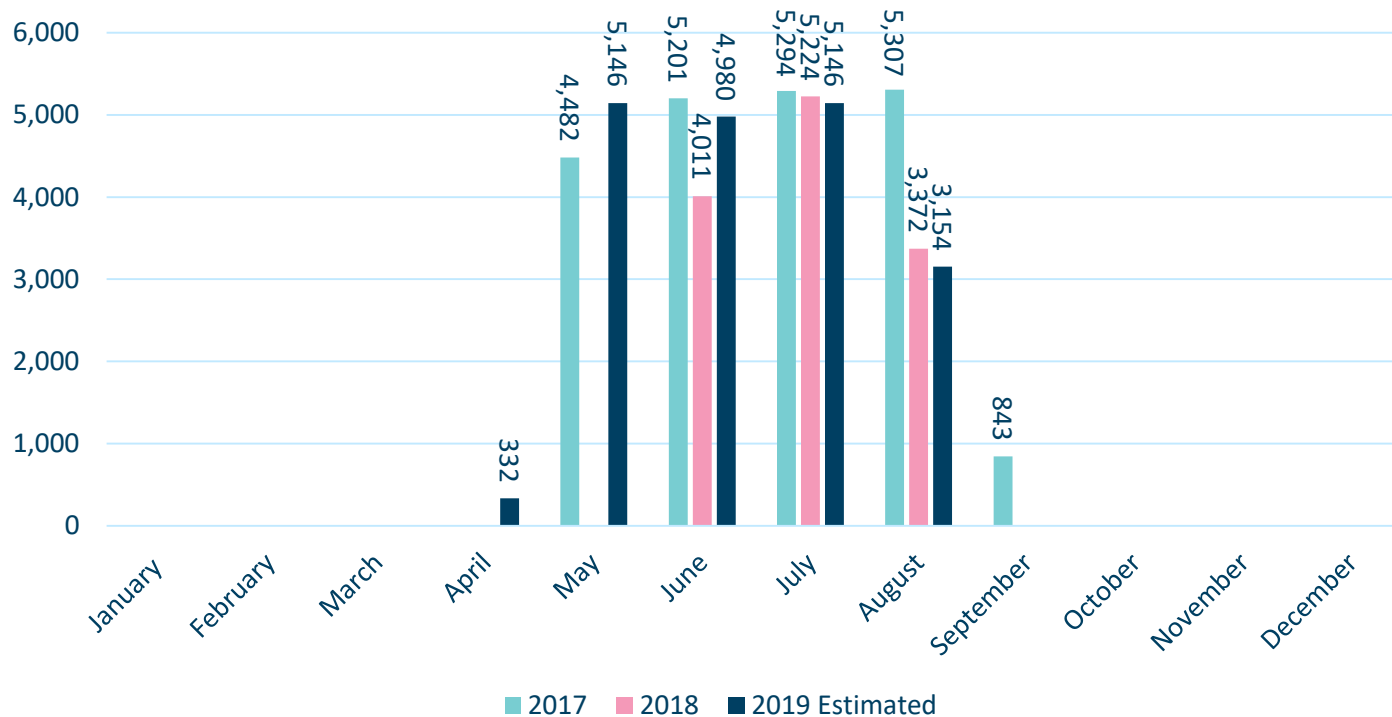
CHANGE YOY



-27,929

-14%

Newark Air Capacity

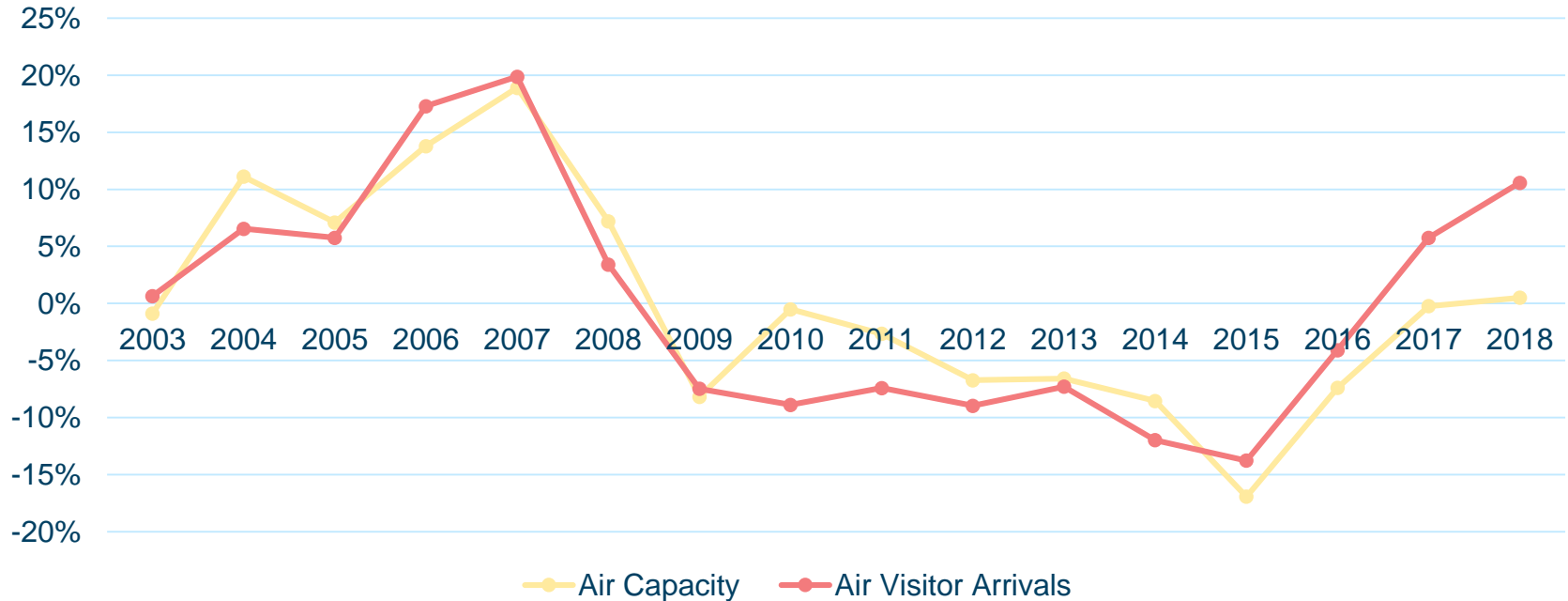


CHANGE YOY



6,151
+49%

Air Capacity & Visitor Air Arrivals (vs Avg)

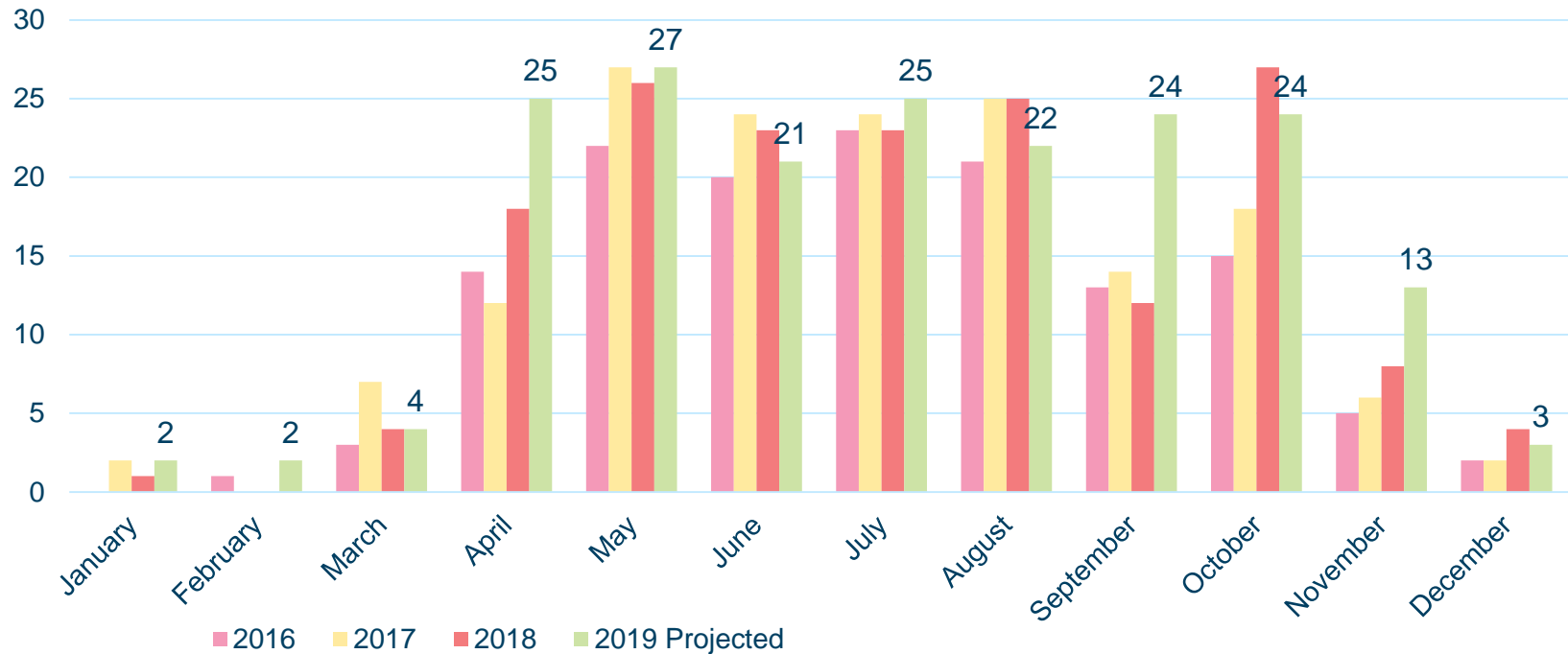


Bermuda Seasonal Flights

			JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	
USA	NEW YORK	JFK													(AA, JetBlue, Delta)
	NEWARK	EWR													(United April 29th-Aug 19th)
	ATLANTA	ATL													(Delta)
	BOSTON	BOS													(Delta, JetBlue)
	CHARLOTTE	CLT													(AA June 8th - Aug 17th)
	MIAMI	MIA													(AA)
	PHILADELPHIA	PHL													(AA)
	WASHINGTON, DC	DCA													(AA June 6th - Aug 19th)
CANADA	TORONTO	YYZ													(Air Canada, WestJet)
UK	LONDON	LGW													(BA)

Direct Daily	
Direct, Not Daily	
Not Direct	

2019 Cruise Calls



Increased cruise calls in non-summer months is a recent trend.

National Tourism Plan

STAYING ON-PLAN IN 2019

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NTP Objective:	Success Indicators. By 2025...					
<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 	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)

NTP Vision:	Cities	FOCUS: New York City, Boston, Washington, DC, Philadelphia, Toronto			
		NURTURE: Baltimore, Hartford, Atlanta, Chicago, Dallas, San Francisco			
• 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	Target Visitors				

Strategic Pillars

AWARENESS & RELEVANCE

Differentiating Bermuda

GREENER

Growing By Being Pink, Blue + Greener

INFRASTRUCTURE

Building Frictionless Experiences

LOCAL INVOLVEMENT

Growing Through People

INNOVATION

Thinking Like a Visitor

TEAMS AND GROUPS

Growing Through Groups

YEAR-ROUND

Embracing Seasonality

OBJECTIVE:

*Progress the strategies of the
National Tourism Plan without
taking our eye off the ball on
2019 industry performance*

FOCUS CITIES

- NEW YORK CITY
- BOSTON
- WASHINGTON, DC
- PHILADELPHIA
- TORONTO

NURTURE CITIES

- HARTFORD
- DALLAS
- ATLANTA
- CHICAGO
- BALTIMORE
- SAN FRANCISCO



BTA 2019 Strategic Priorities

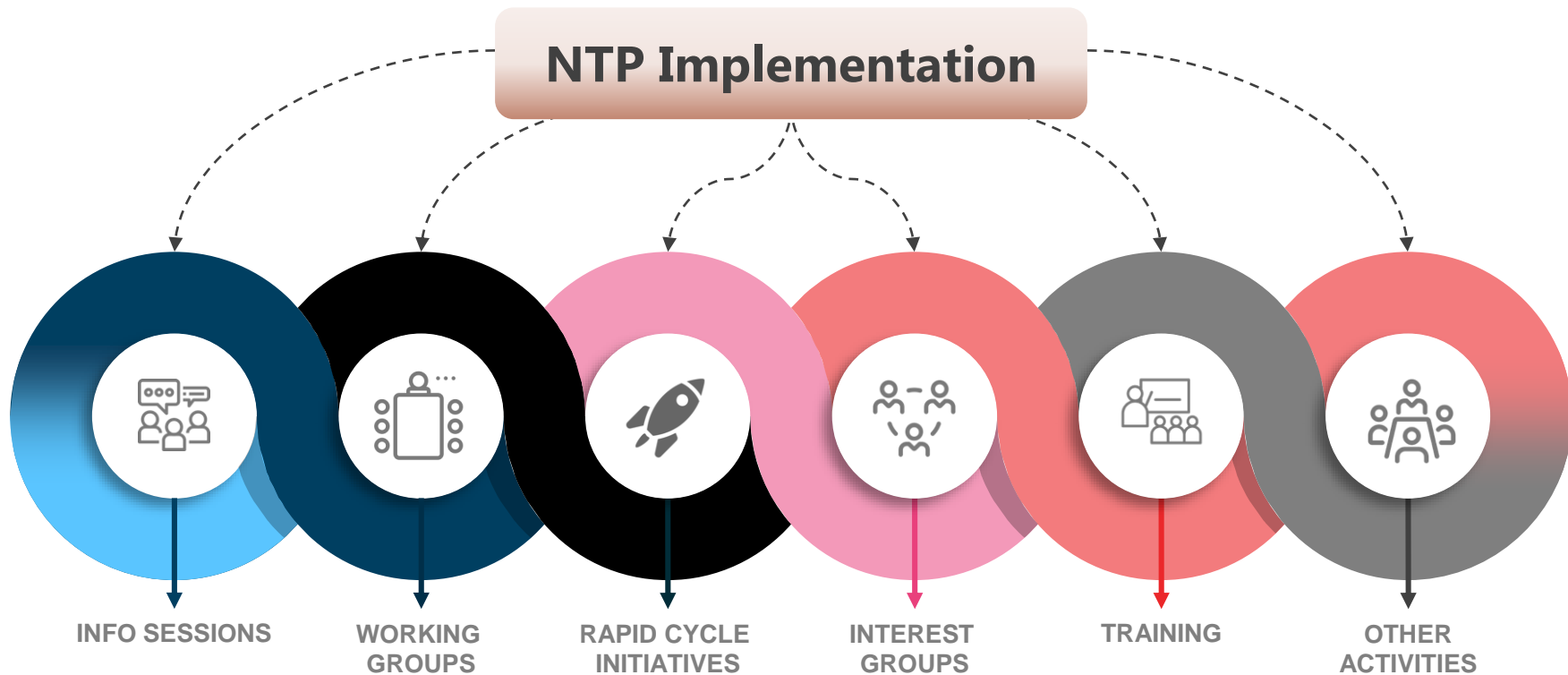


1. Deliver balanced growth, with an **emphasis on the non-summer seasons**
2. Concentrate our efforts on our must win/have **Experience Enthusiast, Adventure Seeker and Jetsetter segments**, and invest for the future in nurturing our Active Family segment
3. Make Bermuda **easier to experience**
4. Empower Bermudians to **participate in the tourism economy**
5. Motivate our **stakeholders to engage and act on the NTP** through engagement, education and role modeling best practice

BERMUDA

— AGILITY —

NTP Implementation



AMBITIOUS

BERMUDA US LEISURE AIR VISITOR TARGETS

ADVENTURE SEEKER

FIT

Stylish

DIVERSE

URBANITES

TECHIE

trendsetter

WHO
ARE THEY?

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

ADVENTURE SEEKERS MORE LIKELY TO



NETFLIX



BERMUDA US LEISURE AIR VISITOR TARGETS

Experience *cultured*
ESCAPE ENTHUSIAST
indulgent SOPHISTICATED

CITY
DWELLER

*Educated
Savvy*

WHO
ARE THEY?

- 25-44
- HH \$100K+
- COUPLES
- 6+ TRIPS/YEAR



Spotify



EXPERIENCE ENTHUSIASTS MORE LIKELY TO

BERMUDA US LEISURE AIR VISITOR TARGETS

ACTIVE Bonding FAMILIES ORGANIZED SPORTY

URBAN
SUBURBANITES

WHO
ARE THEY?

- 35-54
- HH \$160K+
- CHILDREN UNDER 18
- 6-7 TRIPS/YEAR

ACTIVE FAMILIES MORE LIKELY TO



BERMUDA US LEISURE AIR VISITOR TARGETS

JETSETTER

Exclusive
prestigious
Luxury badge-worthy
experiences

WHO
ARE THEY?

- 30+
- HH \$250K+
- 6+ TRIPS/YEAR




Foodie

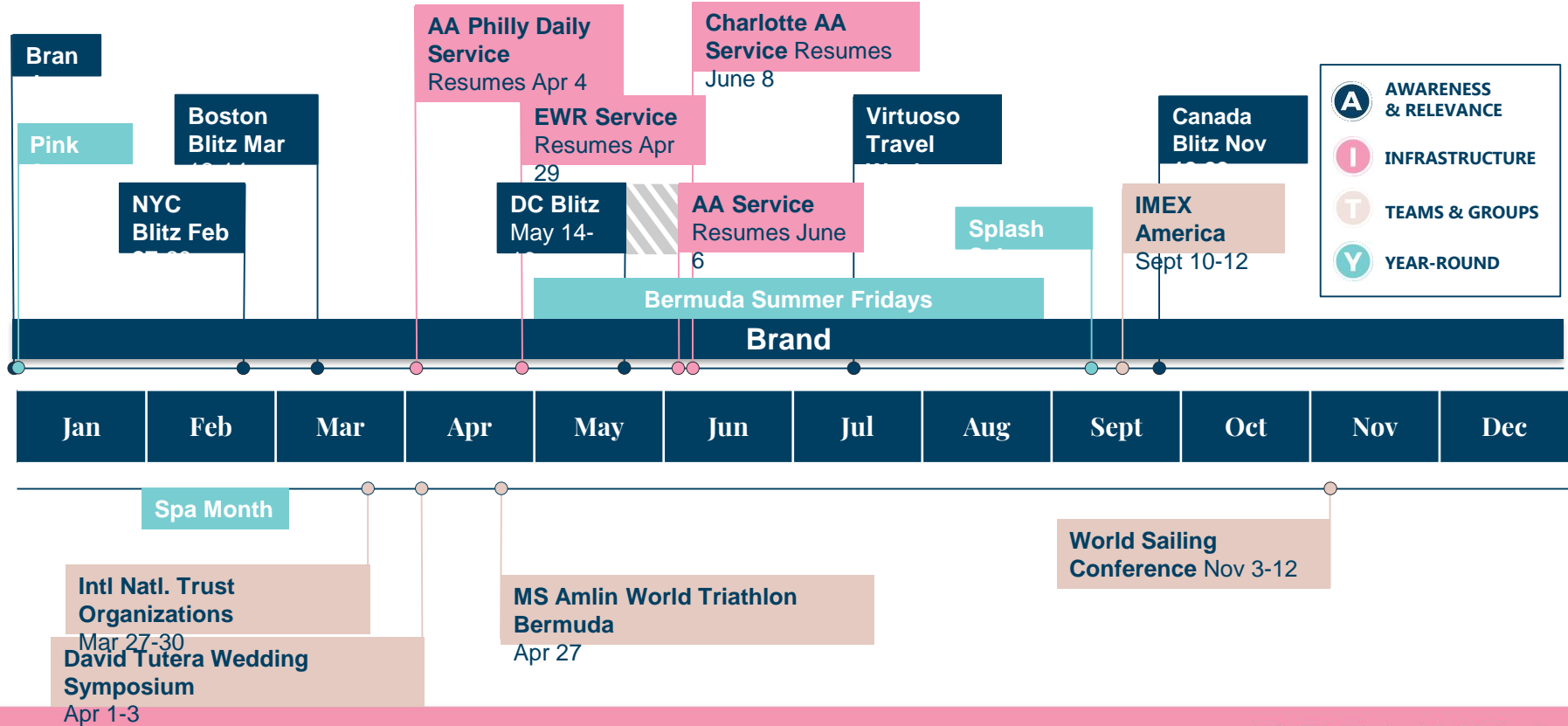
ELITE JETSETTERS MORE LIKELY TO



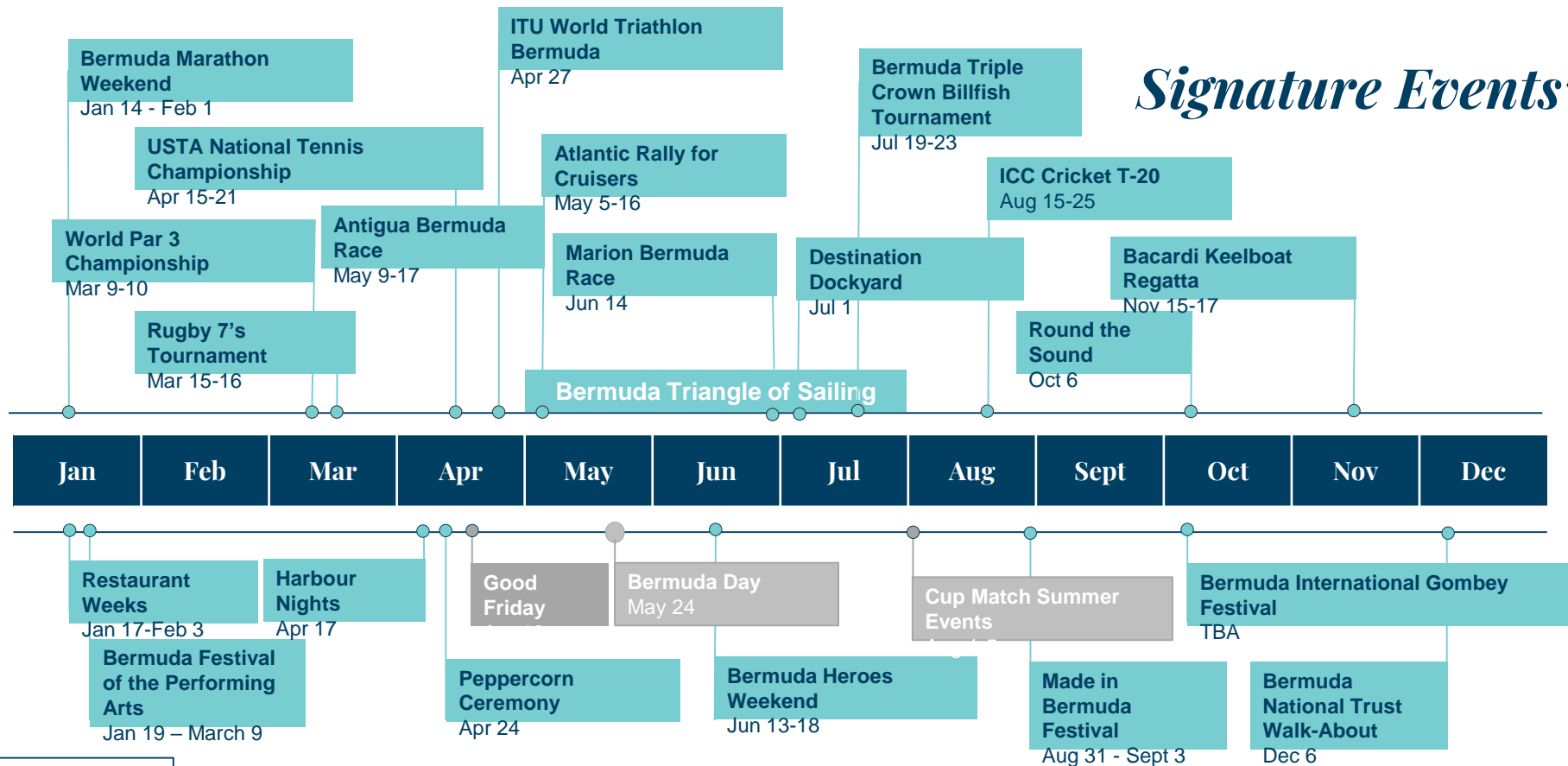
2019 Visitor Micro-Segments

MUST WIN	 A green word cloud with 'ADVENTURE SEEKER' in large, bold, dark blue letters. Other words include 'EDGY', 'AMBITIOUS', 'FIT', 'SE', and 'ADVENTURE'.	 A blue word cloud with 'Experience' in large, elegant, white script and 'ENTHUSIAST' in bold, dark blue capital letters. Other words include 'Indulgent' and 'Educ'.
MICRO	AFRICAN AMERICANS	BABYMOONERS
MUST HAVE	 A red word cloud with 'JETSETTER' in large, bold, dark blue letters. Other words include 'worthy', 'experiences', 'prestigious', 'luxury', and 'badge-worthy'.	
MICRO	SUPERYACHTS	DESTINATION WEDDINGS

Generating Demand



Signature Events*



Y YEAR-ROUND

*Dates Subject to Change

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NTP Strategic Pillars

**AWARENESS &
RELEVANCE**

INFRASTRUCTURE

INNOVATION

YEAR-ROUND



GREENER

LOCAL INVOLVEMENT

TEAMS & GROUPS



Teams & Groups

Growing through Groups
(MICE, Sports, Etc)

BERMUDA
— AGILITY —

Teams & Groups: The Opportunity

BY 2025...

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

2019 Teams & Groups

49
Groups

7,000
Attendees

18,000
Room Nights

Meetings & Events Brand Video





Sports Tourism Strategy



New strategy shared with stakeholders in March

An action item tactic of the National Tourism Plan

2019 NTP Working Groups

			
Awareness & Relevance	Infrastructure	Local Involvement	Innovation
Babymoons <i>Rapid Cycle</i>	Accessibility <i>Working Group</i>	CTA Syllabus Reboot <i>Working Group</i>	African Diaspora Heritage Tr. <i>Working Group</i>
			Vacation Rentals <i>Working Group</i>

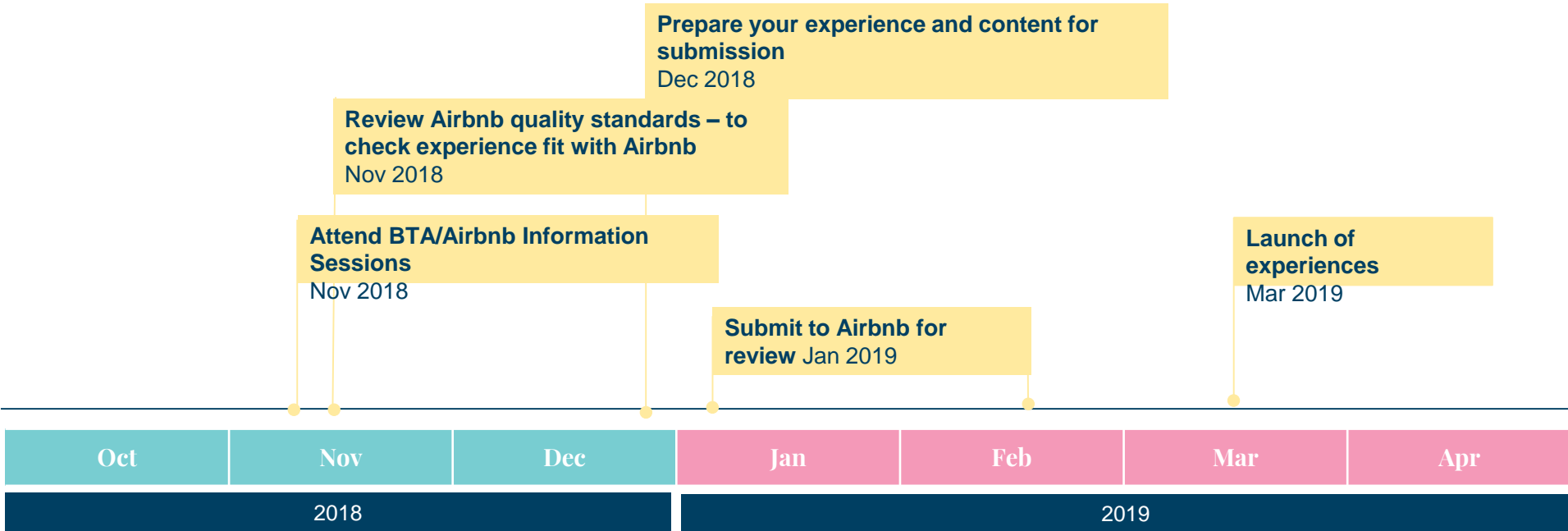
Work Completed

Work Underway

Work Underway

Work Underway

Airbnb Experiences



Contact abbexperiences@bermudatourism.com to receive additional information

Hamilton Visitor Services Centre



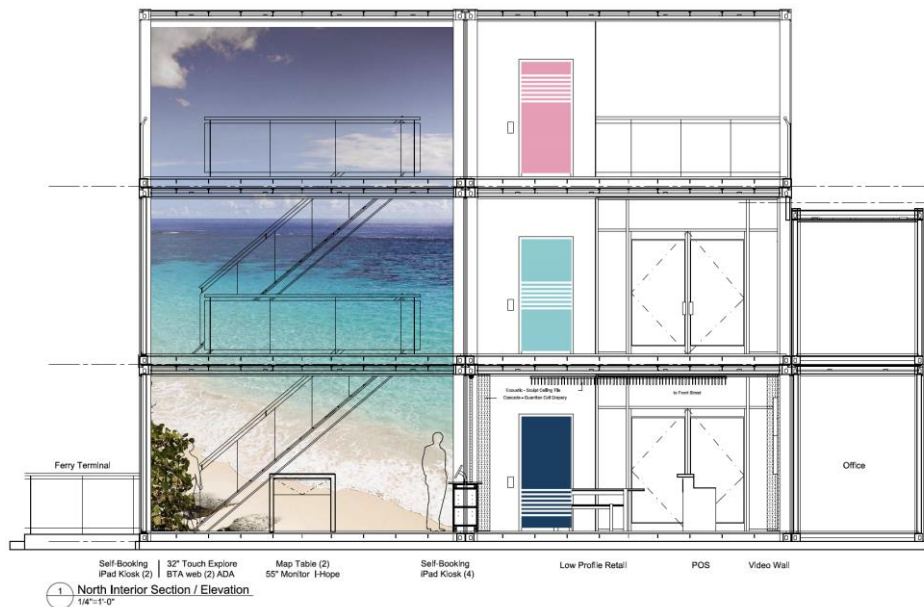
EXTERIOR - UPDATED VESTIBULE DESIGN



Official
Opening
April 2019

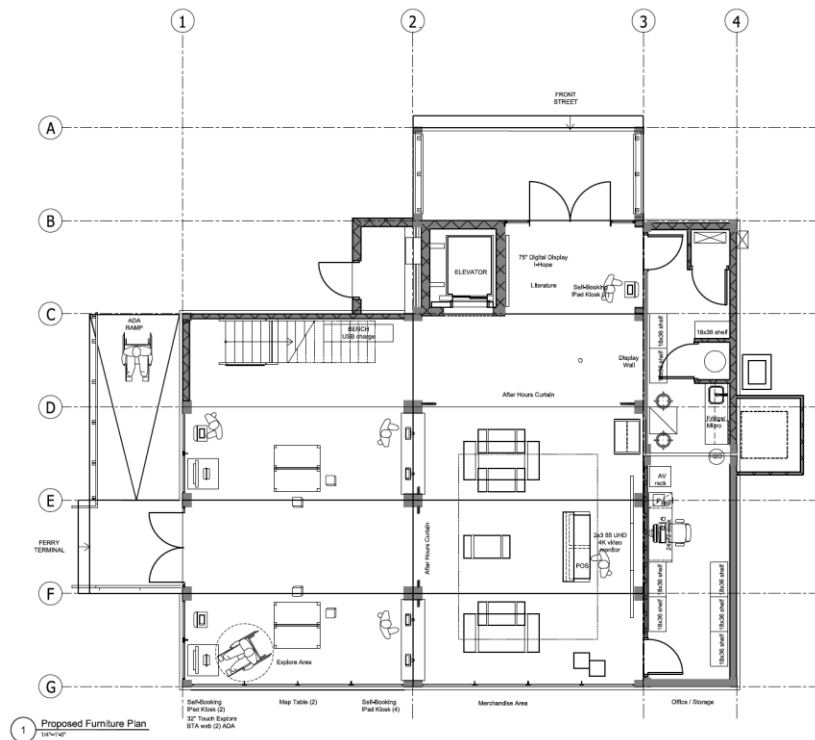
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Reimagining the Waterfront

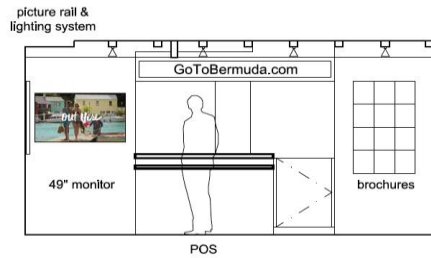


View from Harbour

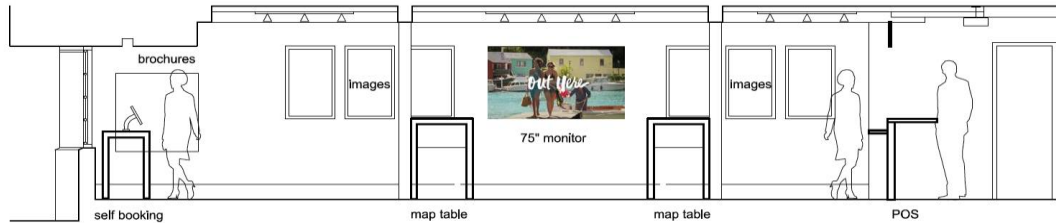
Front Street Entry



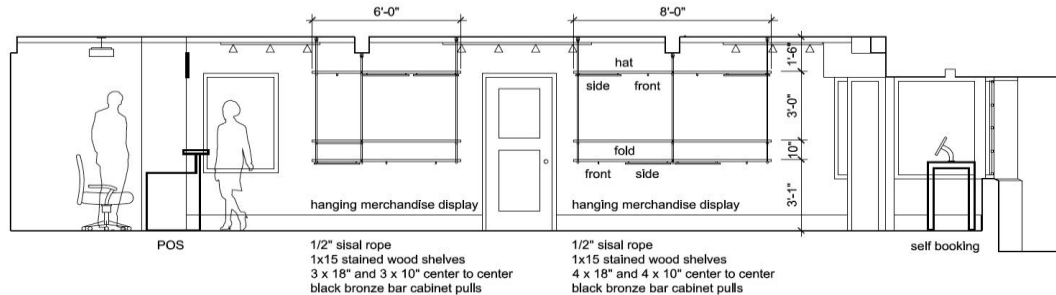
St. George's VSC



1 Proposed North Elevation
1/4"=1'-0"

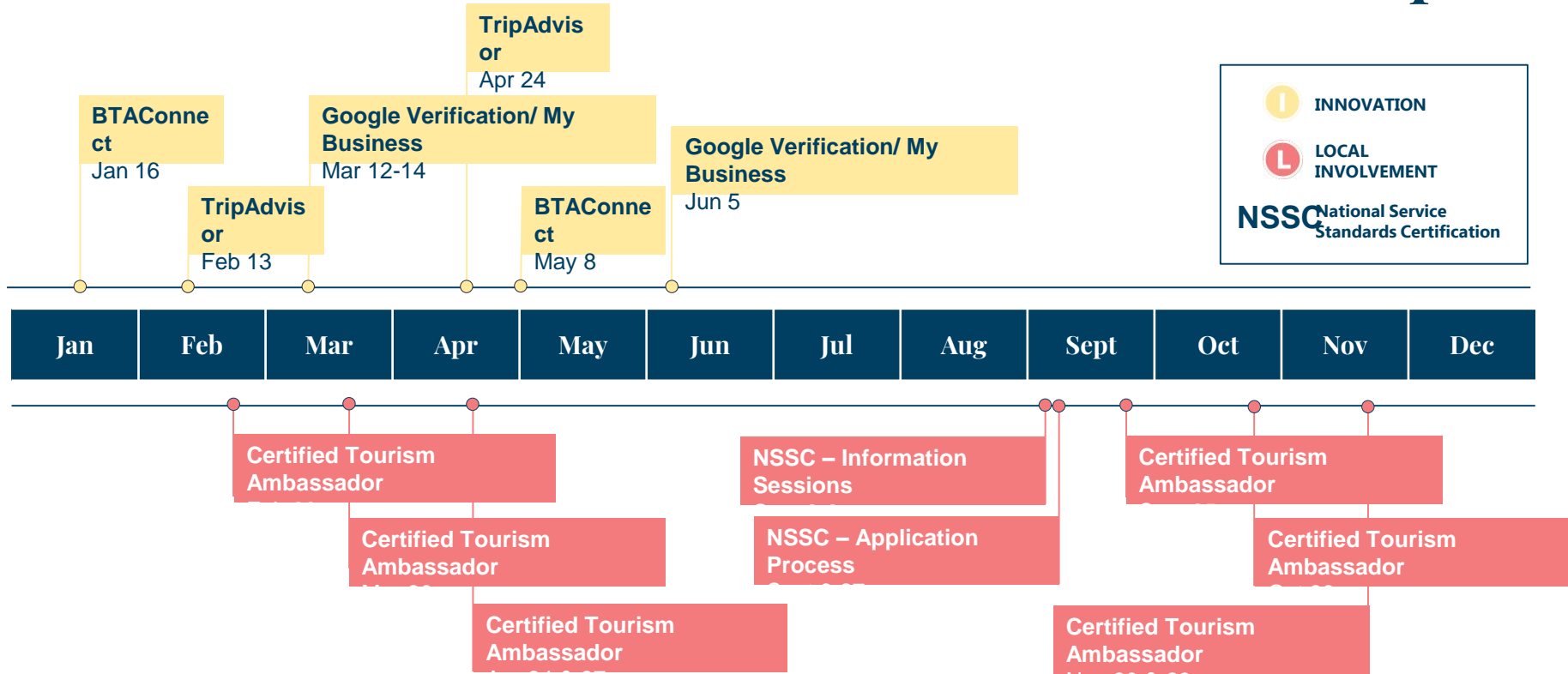


2 Proposed West Elevation
1/4"=1'-0"



- New facility inside Gosling's building on York Street
- Will fit seamlessly with town's charming architectural heritage
- Will connect visitors with experiences in east end & island-wide
- Official opening April 2019

Stakeholder Workshops



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	Need States				
	Seeking Experiences	Adult/Couples Retreat		Family Fun & Bonding	

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GoToBermuda.com/BTA

CLICK PRESENTATIONS

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Panel

Panelists

- Aaron Adderley – Skyport
- Kendaree Burgess – Bermuda Chamber of Commerce
- Kevin Dallas – Bermuda Tourism Authority
- Min. Zane DeSilva – Ministry of Tourism & Transport
- Nathan Kowalski – Anchor Investments
- Tim Morrison – Bermuda Hotel Association