

BERMUDA

TOURISM AUTHORITY



2018 Year in Review

BERMUDA TOURISM AUTHORITY YEAR IN REVIEW 2018

Three Years of Hard-Fought Wins. More Hard Work Ahead

Destination marketing is an ultra-competitive industry and that's why three consecutive years of tourism growth for Bermuda is an exceptional accomplishment. Since January 2016 until the end of 2018, Bermuda experienced 12 consecutive quarters of year-over-year growth, with leisure air visitors and air visitor spending consistently on the rise. It's a remarkable winning streak!

Given that performance, winning is the theme of the 2018 Bermuda Tourism Year in Review. This type of success is only possible when tourism stakeholders are passionately collaborating. All of Bermuda should celebrate this victory and then, of course, get right back to work.

In addition to the record-breaking arrival numbers, here is a handful of wins covered in depth throughout this annual report.

This report is also available as a live interactive document. To view the videos and presentations contained herein visit:
<http://annualreport.bermudatourism.com/2018/>

World Triathlon Bermuda - Flora Duffy's dominant hometown victory at MS Amlin World Triathlon Bermuda was not only a celebratory sports moment for the country but also an economic win. A PWC study revealed the event generated \$4.4 million, a 152 percent economic return for the island.

Conde Nast Traveler - In October, Bermuda won an influential readers' poll, finishing as the #1 island in the Caribbean and Atlantic Region, while simultaneously being celebrated in a spectacular photo on the cover of Conde Nast Traveler's November issue.

Google Street View - A two-year long effort to increase Bermuda's Google presence was completed. The final feat was hundreds of photos, video and 360 images uploaded to Google Street View, making Bermuda the first island destination to have its entire jurisdiction on the platform.

Cruise Season Extension - Cruise passenger arrivals outside of the summer months surged 34 percent, an important Bermuda Tourism Authority strategy to create a year-round travel industry that keeps tourism workers and entrepreneurs earning money every month of the year.

National Tourism Plan - About 800 members of the public contributed their thoughts and ideas to the formation of the National Tourism Plan which sets forth Bermuda's winning game plan for a balanced and growing tourism industry through 2025.

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Dear Stakeholders,

Victory! That feels like one of the few words that can come anywhere close to describing Bermuda's tourism industry performance in 2018.

Heading into 2018, the Board of Directors and the senior leadership at the Bermuda Tourism Authority wondered aloud how the industry would ever best the record-breaking performance in 2017. In the wake of the America's Cup, it was a daunting task to be sure. However, our team, in tandem with tourism stakeholders, turned out to be more than up for the challenge. Not only did Bermuda match the lofty performance of 2017, she exceeded it by a healthy margin.

That's why the theme of this year's Annual Report is victory. Whether it was *Flora Duffy's* remarkable win before a home crowd during World Triathlon Bermuda, Bermuda's Conde Nast Traveler cover story as Best Island in the region or seeing new hotel projects rising optimistically out of the ground – our destination amassed a long overdue winning streak as 2018 came to a close. And as the streak heads into its fourth consecutive year of economic recovery, it's important to take note that Bermudian entrepreneurs and hospitality workers are reaping the benefits of new opportunity. The employment of Bermudians in the hotel industry, for example, is up sizably between 2016 and 2018, according to the government's most recent quarterly statistics. If you're in search of a winner when the industry performs well, look no further than the tourism worker.

The 203,697 leisure air arrivals to Bermuda in 2018 exceeded the 2017 number by more than 21,000 and is the highest the country has seen since 2002. Sixteen years ago, 218,248 leisure travellers arrived by air. While the volume in 2018 did not best that 2002 level, it did outperform 2007 – the previous benchmark for success because it was the most recent time leisure air arrivals neared the 200,000 threshold.

Leisure Air Visitors by Year

	2002	2016	2017	2018	2017 v 2018 #CHG	2017 v 2018 %CHG
Leisure Air Visitors	218,248	164,321	182,439	203,697	21,258	11.7%

The outcome of 2018 is a very promising sign. It should reassure the country that the tourism comeback we are experiencing is on a sustainable path, driven by strong marketing fundamentals and not overly reliant on a major event like the America's Cup. Those global events help undoubtedly, but 2018 proved they are not a prerequisite for success.

For 2018 when compared to 2017:



“The biggest record-breaking number is in total visitors – that’s cruise, air and yacht figures combined. The previous record was 692,947 achieved in 2017. In 2018, that number grew 11 percent to finish at 770,683 – a new record.”

The biggest record-breaking number is in total visitors – that’s cruise, air and yacht figures combined. The previous record was 692,947 achieved in 2017. In 2018, that number grew 11 percent to finish at 770,683 – a new record.

The growth in cruise arrivals is noteworthy because it includes the results of the Bermuda Tourism Authority’s strategy to expand the cruise season to welcome an increased number of cruise calls outside of the summer months, particularly the spring and fall. This step is part of a National Tourism Plan-inspired strategy of balance, which calls for not only better balance in the calendar but also the need to balance the gap between air and cruise visitors.

On this point, a completed National Tourism Plan was also a major win for the country – a plan built consultatively and collaboratively. The plan was rolled out during our annual tourism summit in October and work began instantly to execute with a series of town hall meetings and working groups. As we head into 2019, we have a roadmap for success to 2025.

On behalf of the Board of Directors, I congratulate all the men and women in hospitality that propelled the country to another growth year in tourism. Three years of rampant growth is not possible if the Bermuda Tourism Authority is working unilaterally – the only way to win is to do it as a team.

Sincerely,



Paul Telford
Chairman of the Board

“
If you’re in search of
a winner when the
industry performs well,
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the tourism worker.”



Dear Stakeholder,

At the end of 2018, Bermuda's tourism industry was up dramatically in the most important categories when compared to the situation three years prior:

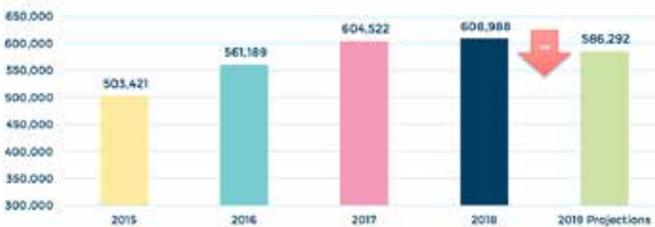
- In 2018, leisure air visitor spending was up 66.9% when compared to 2015
- In 2018, leisure air visitor arrivals were up 45.7% when compared to 2015

After three straight years of robust tourism industry growth, it will be difficult to maintain a similar pace of progress. That realisation is not defeatist, it's an acknowledgment that even modest growth in 2019 is a big win, because Bermuda has come so far so quickly.

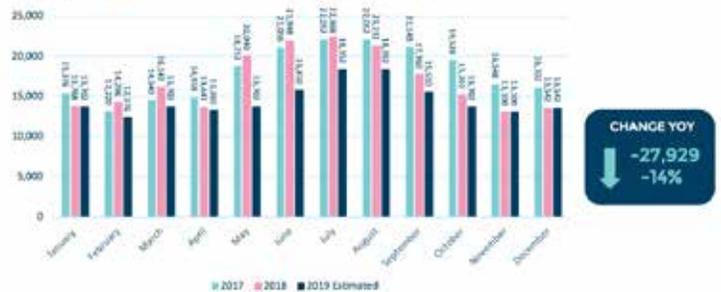
One of the enablers to our recent tourism success has been an increase in airlift capacity – having more commercial airline flights to Bermuda from the right cities at the right time of year. The number of seats available to passengers flying to Bermuda was up 21 percent in 2018 when compared to 2015. However, in 2019, that number is forecast to dip for the first time in a long time as airline partners (1) readjust to increased competition on certain Bermuda routes and (2) explore opportunities to other destinations where it's possible to earn more revenue per flight against lower costs.



Air Capacity



JFK Air Capacity



Particularly troublesome is Bermuda's year-over-year decline in lift capacity from John F. Kennedy International Airport in New York City, which is expected to be down at least 14 percent. Because more of Bermuda's leisure air visitors come from New York City than any place else, the downward forecast is worrying, and it's important to note: the 49 percent capacity increase projected from Newark International in 2019 will not fill the gap.

Newark Air Capacity



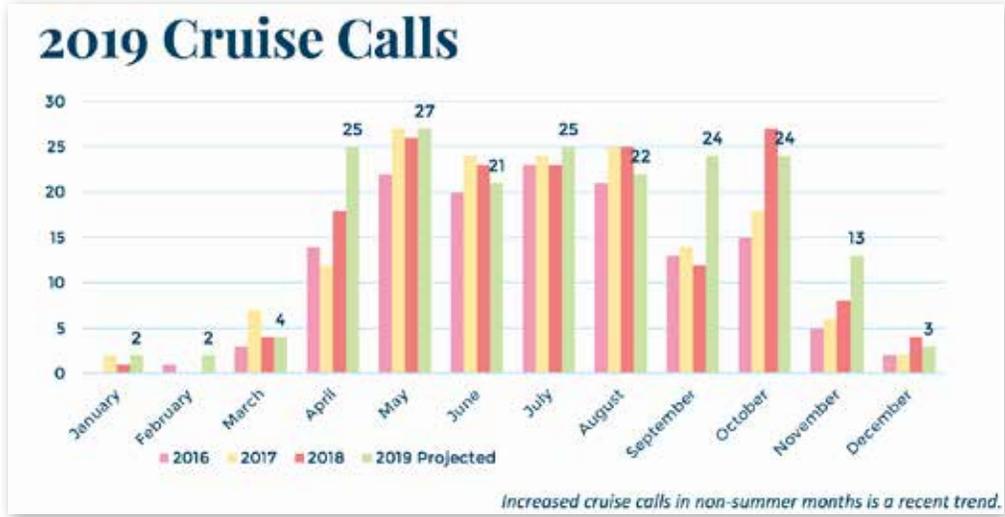
Air Capacity & Visitor Air Arrivals (vs Avg)



Although airlift presents a formidable challenge, the Bermuda Tourism Authority still forecasts leisure air arrival growth in 2019, fuelled by a collective stakeholder focus on executing the strategies of the National Tourism Plan. Primary target cities identified in the plan performed well in 2018 and are expected to perform well again in 2019. Those markets: New York City, Boston, Philadelphia, Washington, D.C. and Toronto, remain Bermuda's main focus and catchment areas, as our destination continues to drive the overwhelming majority of its travellers from these places.

On the cruise side of the business, we know to expect another growth year in the number of passenger arrivals. Importantly though, a growing share of those visitors will arrive in the non-summer months. This is a tactical move toward a shared Government of Bermuda and Bermuda Tourism Authority goal to create a year-round travel industry that keeps tourism workers and entrepreneurs earning money every month of the year.

”
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As we head into 2019, Bermuda is fortunate to have a winning game plan through 2025. In the final quarter of 2018, the island's first National Tourism Plan since 2012 was rolled out. It took the better part of the year to research, write and coordinate with hundreds of stakeholders across the tourism economy. Now the hard work begins – implementation. And since only about 20 percent of the plan is in the direct control of our organisation, we very much look forward to working with all stakeholders to execute the tourism vision articulated in the plan.

Kevin Dallas
CEO, Bermuda Tourism Authority



“We need only look to the data. It shows 2018 was another winning year in terms of visitor arrivals and spending.”

Erin Smith, Director of Research & Business Intelligence

Overview

Innovation and exploration are probably two key words for the work that the Research & Business Intelligence Division has carried out in 2018. As integral as they are to the provision of timely, relevant and critical information to the BTA, which forms the basis for strategic direction, the R&BI team also serves BTA stakeholders with information and resources.

In 2018, the R&BI team worked closely with all of the BTA divisions to evaluate the research, studies and tools that should either be collected, conducted or created that would, in turn, assist them in achieving their goals as part of their strategic plans. It has become increasingly apparent over the years that the R&BI team contribute to the overall success of the BTA, as can be seen by the highlights in this year’s report.

Highlights

Online Air Visitor Arrival Form

In line with the Division’s goal to reduce the manual processing of visitor arrival forms for the benefit of both visitors and the BTA, the R&BI team developed, tested and completed the soft launch of an online air visitor arrival form. Available to visitors in advance of their arrival at bermudaarrivalcard.com, the BTA is also able to use the form to share information on local events and activities. Visitors who go to the gotobermuda.com website will find instructions under Planning Essentials, *Need-to-Know: A Guide to Your First Hour in Bermuda*. Over 250,000 subscribers to the BTA newsletter were notified of the online form, while hotels, airlines and tour operators are in the process of adding the information to booking confirmations.



ARRIVING IN BERMUDA JUST GOT EASIER

Our new online Visitor Arrival Card can be completed before you arrive in Bermuda. It's easy: fill it in, print it out, show a copy to the immigration officials along with your passport and you'll be out the door and living the island life. Can't get online? Don't worry, our pink paper arrival forms are still available on board.

GET YOURS NOW

Love Getting Lost

Once you arrive, getting around the 21 square mile island is a breeze. Whether by foot or ferry, public transport is a great way to get around and explore our warm, welcoming culture. Rent a scooter or an electric bike, rent a car and zip around to hidden gems or hire a taxi - many of our drivers are excellent tour guides, eager to share the stories behind the island's landmarks.

GET MOVING

U.S. Customs Pre-Clearance

Travelers to the United States clear customs before they depart Bermuda.

Global Entry to the Middle of the Atlantic

Travel efficiently and securely with global entry lanes available in Bermuda's L.F. Wade International Airport. Travelers can scan their passport and fingerprints and answer customs declaration questions in under a minute.

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Visitor Info

Last Name	First Name	Gender
Smith	George	Male
Country	Passport Number	Expiration Date
United States	1234567	02/04/2026
Email	Date of Birth	Date of Arrival
gsmith22@gmail.com	06/01/1976	07/05/2018
Flight	Class of Fare	AA1416

Home Address

Number, Street Name and City

123 Madison Avenue

City/State

NEW YORK	NEW YORK
Country	Zip/Postal Code
United States	15016

Need to be notified?

Yes No

Number of Notifications: 4

Primary Purpose of Visit

Vacation

Accommodation

Fairmont Southampton

Signature

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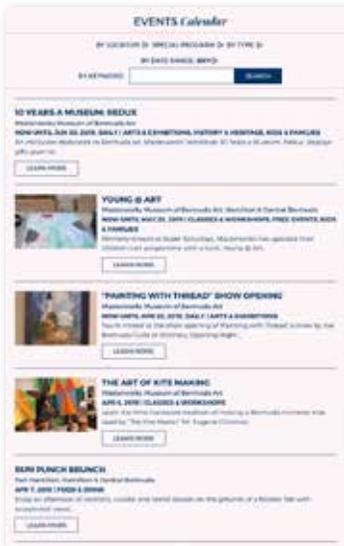
Customer Relationship Management

In April, an experienced Business Analyst and Customer Relationship Management (CRM) Specialist joined the R&BI team. From the outset, an internal super-user group was formed to leverage division-specific CRM capabilities, such as creating an internal and stakeholder training plan and extensive documentation for users, as well as to implement best practices and standard operating procedures. CRM integrations were also optimised with Outlook, the Event Impact Calculator (to estimate ROI on groups and events), email marketing campaigns, amongst other things.

The CRM platform furthermore allows for more customised email marketing programmes through appended visitor segments, and itinerary templates have also been built to generate automatically for fam trips and groups. Other uses will continue to emerge as needs arise.

Stakeholder Portal (BTAConnect)

As part of the R&BI's remit to provide a central online portal for stakeholders, in October, BTAConnect was launched. The BTAConnect platform provides a consistent connection with tourism industry stakeholders so that key developments, events and opportunities around the tourism industry, as well as the latest research and performance data, can be shared regularly throughout the year.

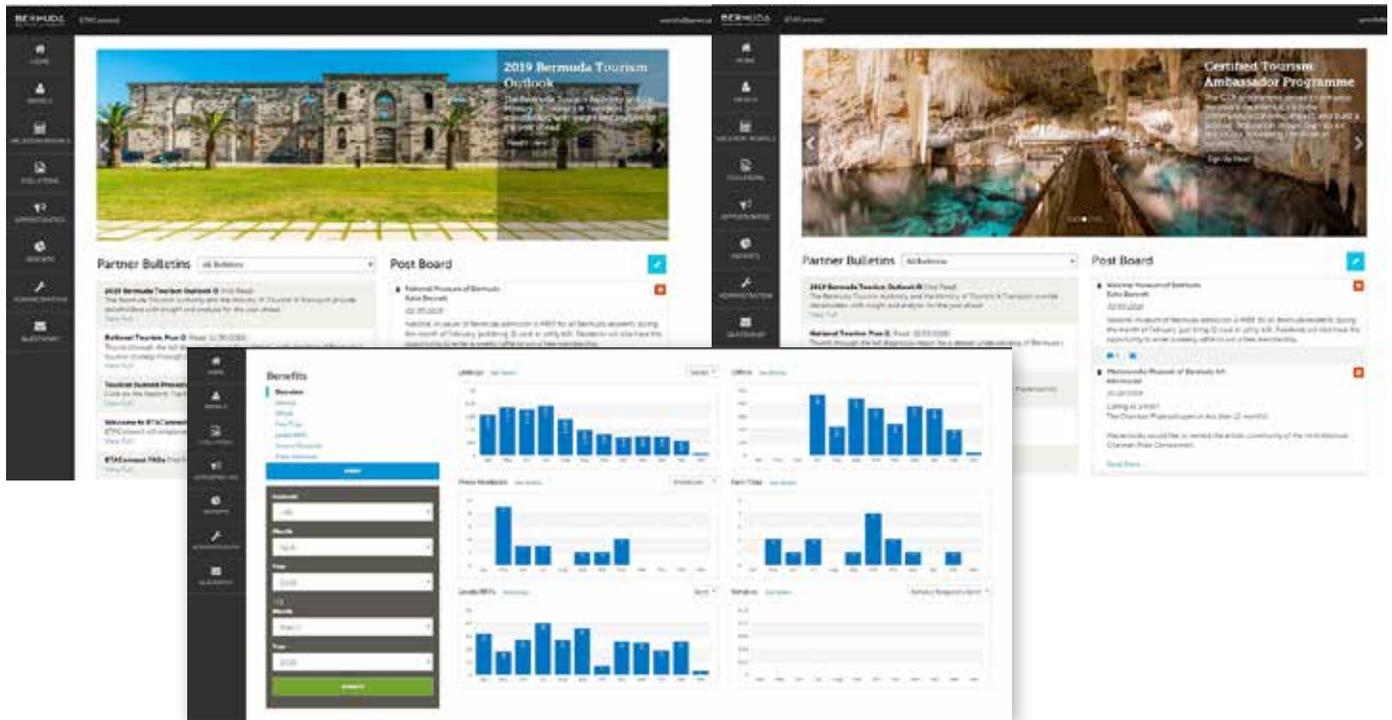


Only stakeholders with a login are able to access the portal, which allows some control over proprietary or competitively sensitive information. Stakeholder training was held in October and November to show that, among the many capabilities, stakeholders can:

- Manage their account information, listing descriptions on the website, update photos, add events to our events calendar, receive sales leads and post special offers
- Access industry and custom reports
- Upload tourism-related event information that, once vetted, is published for visitors to see on GoToBermuda.com/Events
- Communicate with each other, and can review Bermuda Tourism Authority press releases and press clippings about the destination

In addition, an online payment platform was built for vacation rental property owners or agents to remit the Tourism Authority fees collected from visitors staying in their units. A tutorial on how to use the payment portal was also created.

The CRM platform furthermore allows for more customised email marketing programmes through appended visitor segments, and itinerary templates have also been built to generate automatically for family trips and groups. Other uses will continue to emerge as needs arise.



Research & Analysis

Impact Study Of World Triathlon Series Bermuda 2018

Upon completion of the highly successful World Triathlon Series in Bermuda 2018, the R&BI team commissioned, managed and released an independent **Impact Study** of the Series and completed media exposure reports for each sponsor. The results showed that:

- The event generated an overall economic impact of \$4.4 million, representing a 152 percent return on the \$2.9 million investment by the Government of Bermuda
- Media coverage of World Triathlon Bermuda netted an estimated 1.1 million viewers, generating \$17.8 million in estimated advertising equivalent
- In all 890 individuals travelled to the island for World Triathlon Bermuda, 304 of them to participate.



Flora Duffy's dominant hometown victory at MS Amlin World Triathlon Bermuda was not only a celebratory sports moment for the country but also an economic win.

Data Visualisation

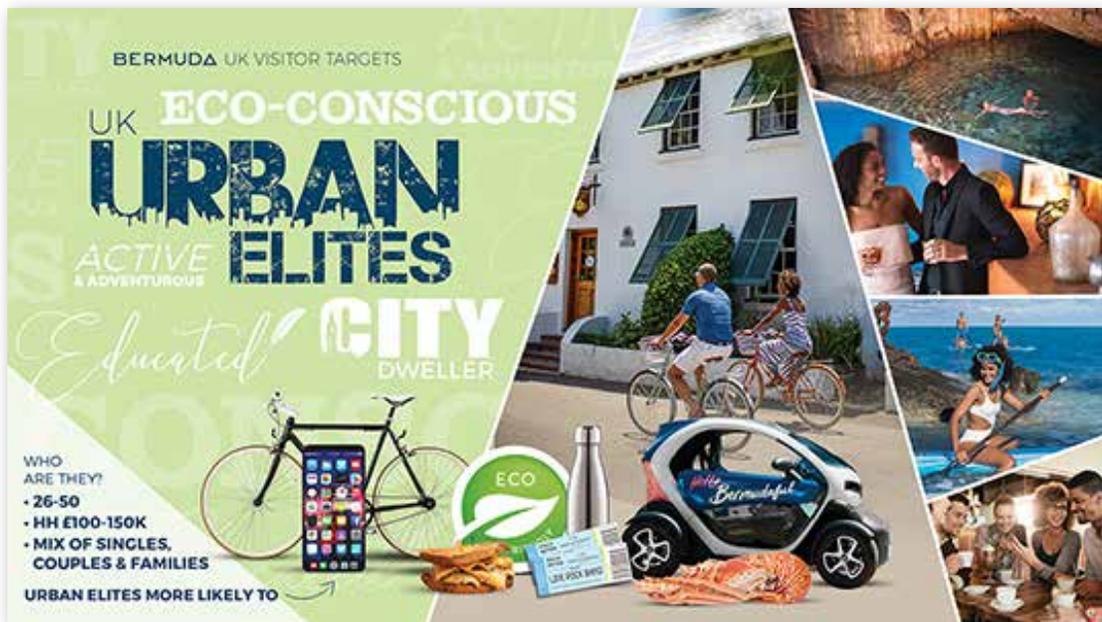
In order to improve data visualisation, the R&BI team implemented Power BI, a business analytics tool that transforms data into visuals that can be shared on multiple devices. Power BI is currently used for air arrival data and additional data sets.

Visitor Service(s) Centres – Feedback Survey

In the first half of the year, the R&BI Division developed and launched a customer feedback survey for patrons of the Visitor Services Centres to measure satisfaction and monitor the customer experience. In addition, we developed a KPI dashboard for the Visitor Service Centres to monitor performance on a quarterly basis.

Leisure Visitor Segments UK & Canada Market

Similar to the US segments developed in 2017, this full analysis of current visitor profiles and potential in these target markets allows the BTA to target these prioritised segments through marketing, and to develop products on-island to suit their needs.



African-American Traveller Study

The BTA teamed up with a number of other overseas travel organisations to sponsor the 2018 African-American Traveller Study with Mandala Research, a leading travel and tourism research company. The study documents the impact and trends of African-American travellers in the United States, which has grown exponentially over the past eight years. As part of the study, 1,747 African-American leisure travellers in the United States were interviewed through online partner panels.

The data collected was customised to include BTA segments and has given the BTA some insight into how to better reach African-American travellers in its existing target areas.

The study was jointly funded by the BTA, NYC & Company, Visit Baltimore, Virginia Tourism Corporation and the Greater Miami Convention and Visitors Bureau, The Shop America Alliance, Black Meetings and Tourism Magazine, The Vonne Grop, the Manumission Tour Company.

General

During the course of the year, much of the work carried out by the R&BI Division entails regular research and analysis. Those tasks are highlighted here.

Privacy Policies and PIPA Compliance

During the third quarter, the R&BI team completed a full review of privacy policies and started a Personal Information Inventory as part of the Personal Information Protection Act (PIPA) compliance process.

Annual Analysis

Throughout the year, the R&BI Division monitors and provides analysis to the BTA on a monthly and quarterly basis for the following:

- a. Air service to Bermuda:
 - i. Monthly reports on capacity, load factors and route performance
 - ii. Existing and potential new routes
 - iii. Future schedules for projections and use by staff, partners & stakeholders
- b. Future demand projections
- c. Local perception of the BTA and the Tourism Industry to assist with stakeholder and public outreach strategies.
- d. Tourism Key Performance Indicators, including air, cruise, yacht arrivals, air service, visitor expenditure, visitor satisfaction, hotel performance, future projections, etc.
- e. Corporate objective status to staff and Board of Directors.

In addition, the Research & Business Intelligence team meet quarterly with hotel partners, in conjunction with the Sales & Marketing team, to review data and trends, and to identify opportunities.

Performance Metrics



“Destinations that have recognised the value of the African-American travel market will reap rewards not only in terms of increased visitation but in enhanced brand image from the positive word of mouth that will spread among the African-American community.”

Laura Mandala
CEO of Mandala Research



“While winning the ITU World Triathlon Series was an awesome achievement, winning the Grand Final has been our ambition from the beginning. This is an amazing milestone in Bermuda’s journey to become a premier sports tourism destination. I have full confidence that Bermuda will seize this incredible multiyear opportunity to show the world how we skilfully execute high-profile events out here.”

Kevin Dallas, CEO, BTA

Overview

The P&E Division continually seeks to explore and expand Bermuda’s offerings to its visitors in order to attract new and repeat clientele to our shores. This year has been no different in our efforts to do so, but we are definitely seeing a clear increase in both, as highlighted in this report. In particular, the resounding success of the ITU World Triathlon Series gives credence to the BTA’s strategy to focus on sports tourism, bringing all types of athletes and supporting visitors to Bermuda throughout the year.

BTA Experience Investment

The BTA Experience Investment initiative identifies, financially supports and empowers entrepreneurs who create new or enhanced tourism experiences. The experiences demonstrate alignment with the National Tourism Plan objectives and aim to authentically connect visitors to a unique and memorable piece of Bermuda’s island life.

The 2018 Experience Investment Process opened with three educational workshops at the end of August. The goal of the workshops was to educate would-be applicants about tourism trends, gaps in the market place, Bermuda target visitors and the process itself.



In all, 52 applications were received of which 25 were approved for support. Of the 25 successful applicants, four will receive support for the first time. Just over half of the supported experiences focusing on sports and adventure will look to build on BTA’s brand positioning as a year-round sports destination, while increasing air

arrivals and on-island visitor spend-ing. The remaining experiences will continue to provide immersive offerings to enhance Bermuda's arts and culture assets. The list of approved experiences can be accessed here.

Completed Events & Experiences

The roll out of BTA-supported experiences continued successfully through the year, covering arts and culture as well as sporting events. The concert, festival and carnival events generated a total of 561 visitors, while sports events and training generated a total of 3,459 visitors. The overall number of room nights were 944,832 for the year.

- Bermuda Marathon Weekend
- Restaurant Weeks
- Bermuda Festival of the Performing Arts
- Bermuda Triple Challenge
- Ariel Re Bermuda Rugby 7s
- Bermuda Regional Bridge Tournament
- Bermuda Triple Challenge
- Moth World Championships
- Legends of Squash
- Bermuda Ladies Pro-Am Golf Classic
- Bermuda Triangle Beach Experience
- Peppercorn Ceremony Experience Pilot
- King of the Rock Lacrosse Tournament
- USTA National Tennis Championships
- Bermuda Fly Fish International Tournament
- Bermuda Volleyball Open
- Bermuda Triangle Cup

Wi-Fi Initiative

Wi-Fi has been installed at five hotspots around the island: Hamilton Ferry Terminal, Hamilton Bus Terminal, Dockyard Visitor Service Centre, Penno's Wharf and the Customs Department at Ordnance Island. This initiative is helping to address visitor expectations for key services, which include mobile access to real-time information as well as potentially extending economic benefit for entrepreneurs who host events/experiences. Additionally, we've been able to capture visitor details to market and engage with target audiences. In 2018, we recorded a total of 119,970 logins on the Wi-Fi platform, of which 34,223 individuals requested marketing information on Bermuda, on-island activities and special offers, which is normally a good indication of a visitor versus local resident. This translates to approximately 29% of the total of those who logged on.



Destination Services Highlights

To boost on-island client service, further differentiate Bermuda and extend ROI from group business, in April we established the Destination Services Unit within the Product and Experiences division.

Destination Services' responsibilities include designing BTA's on-island activations for experiences/events that we either support or produce in-house; account management and liaison for confirmed groups generated by the Sales and Marketing division; relationship management and coordination of governmental policies or processes that impact visitor experiences.

Hosting, logistics, on-island account liaison and support was successfully provided for a variety of clients and groups during 2018, including the BTA Tourism Summit. The following highlights are taken from the year:

St. Albert Impact Women's Soccer Team Training Camp, July 29-August 6

The women's soccer team of Alberta, Canada trained in Bermuda at the National Sports Centre. The soccer team, coaches and their parents/escorts made up 72 room nights at Willowbank Resort. The team and their parents were also guests in the BTA's Cup Match Visitor's Booth.

St. Joseph's College of Maine's Training Camp, August 9-16

The group of 30 athletes and coaches trained at the National Sports Centre and stayed for 280 nights at Warwick Camp, catering, attractions and transport while on-island. In addition, we facilitated a variety of experiences for the group to extend economic impact, including a catamaran cruise, a Crystal Caves visit and more.

Cup Match Visitor Booth, August 2-3

We hosted a Cup Match Visitor Viewing experience for visitors over the two days of Cup Match from August 2-3 at the Somerset Cricket Club. A total of 638 visitors participated. Along with 14 of Bermuda's Certified Tourism Ambassadors volunteering to host visitors, four former cricketers and their families shared insights about the game of cricket and Cup Match's cultural significance. Four partner sponsors, including Barritt's, Burrows Lightbourn and their beverage brands, added to the overall experience.



International Street and Ball Hockey Federation World Masters Champions 2018, September 25-30

The BTA sponsored a performance by Places Gombey's at the event's welcome reception on Tuesday, September 25. Approximately 600 players, crew and accompanying visitors stayed in a variety of accommodations including Hamilton Princess & Beach Club, Rosedon, the St. George's Club and vacation rentals from September 25-30. This was the first time the tournament was held in Bermuda.

Family Travel Association Summit, October 7-11

The BTA sponsored a welcome reception on Sunday, October 7, for 150 people at the Commissioner's House in Dockyard to kick off the group's two-day Summit from October 8-9. A post-summit site visit was conducted from October 10-11, for the travel trade and media attendees, who surveyed attractions, walked, cycled and boated with local tour guides, sampled local restaurants, and utilised transport and caterers at the east and west ends of the island.

Athlete's Summit (USATF), October 18-21

Athletes from the USA Track and Field's Athletes Advisory Committee (USATF) chose Bermuda for its annual Elite Athlete Summit. The group planned to set its strategic goals during the summit, and boost the development of local athletes. The summit hosted 45 athletes and their security team at the Hamilton Princess & Beach Club.

Encompass Insurance site visit, October 13-16

The BTA hosted meeting planners for their Bermuda programme, which is confirmed to take place in June 2019. Approximately 150 guests will arrive aboard the Royal Caribbean *Anthem of the Seas* cruise ship. Meeting our goals to extend cruise visitor spend on-island, it was confirmed that the group will be using a range of transport, golf, spa and catamaran excursions during the Bermuda Heroes Day holiday weekend.

CHICOS, November 7-9

The HVS' Caribbean Hotel Investment Conference & Operations Summit (CHICOS) returned to Bermuda for a second consecutive year. The three-day event was held at Fairmont Southampton, hosting 250 persons. Attendees included international investors and operators, governmental representatives, opinion leaders, developers, bankers, investment funds, tourism officials and hotel brand executives. The BTA sponsored a 'Bermuda-themed' welcome reception for 150 attendees, as well as a post-summit cruise for 50 persons to conclude the conference.



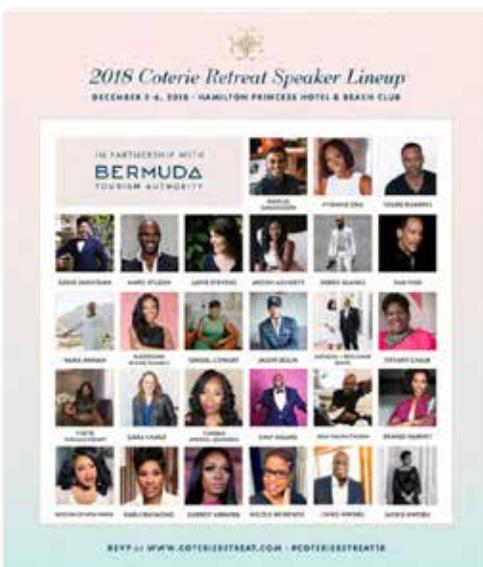
Coterie Retreat, December 4

The Coterie Retreat is a three-day conference for wedding and event professionals that service the multicultural market. Bermuda was chosen as the location for this 5th annual event held at the Hamilton Princess & Beach Club. As a sponsor, the BTA hosted a White Party for 120 guests at the Coral Beach Club complete with Bermuda wedding-themed inspirations. We also connected the organisers with local suppliers that extended the on-island spend of the event.

Cultural & Leisure Highlights

Although we look for new opportunities and initiatives that fulfil our culture and leisure market, at times it is a matter of expanding what we know already works, which led to a range of successful experience enhancements this year. Below are some of the highlights of cultural experiences that we supported.

Restaurant Weeks 2018 ran for three weeks from January 11 to February 4. This year's initiative saw another increase in both lunch and dinner menus within a total of 55 participating restaurants. With four restaurants participating for the first time, and a successful launch event featuring a cross-section of local influencers, Bermuda's food culture was highlighted through special prix fixe menus, many of them offering Bermuda-inspired



dishes. An increase in online engagement helped – achieving over 7,000 views via social media, which elevated this year’s event to support increased traffic and sales to participating restaurants surveyed. The 2018 Peoples’ Choice Award winner was first-time participant *Lost In the Triangle*.

To celebrate frontline workers supporting Bermuda’s tourism industry, the **Faces of Tourism** campaign gave an inside peak into the lives of five on-island experience providers and their passion for the industry. Public engagement with these videos was overwhelmingly positive, with a total of five videos resulting in 92,200 views. The catamaran tour operator *Rising Son* video was the most viewed piece on the BTA corporate Vimeo channel.



Strategic local partnerships and promotions with hotels resulted in 400 visitors attending world-class performances at the 43rd annual **Bermuda Festival of Performing Arts** from January to March. As part of Bermuda’s tourism programming during November-April, the Festival continues to provide offerings to support the BTA’s year-round experiences messaging. This year’s Festival included the unexpected and extremely popular *Red Hot Chilli Pipers* from Scotland, among a huge variety of performing arts that were very well received.

As part of the final phase of the **Cultural Assets Audit & Action Plan**, from March 27–28, Lord Cultural Resources conducted presentations and held discussions with public and private sector stakeholders on-island. The Lord team shared key takeaways, findings and recommendations from the cultural assets inventory audit, stakeholder workshops and individual interviews they conducted, which provided the direction and platform for the resulting action plan. This information served as a key input into the work conducted to update Bermuda’s National Tourism Plan.



To celebrate the 202nd Annual Peppercorn Ceremony, the BTA piloted an **Annual Peppercorn Ceremony Visitor Package** that brought together local dignitaries and centuries-old traditions to provide guests with an enhanced cultural experience. For the first time, ticketed guests had reserved seating at the ceremony, access to the related garden party to mingle with the Governor and local dignitaries, and a private tour of the State House. Infusing new elements to this traditional ceremony led to 28 out of 30 trial visitor packages being sold, providing a model for enhancing similar existing cultural experiences.



Infusing new elements to this traditional ceremony led to 28 out of 30 trial visitor packages being sold, providing a model for enhancing similar existing cultural experiences.

In conjunction with the Department of Community & Cultural Affairs, the BTA hosted a **Bermuda Day Visitor Viewing** area to provide an enhanced viewing experience at this year's Bermuda Day Parade. Over 100 visitors stopped by to watch the colourful floats, dancers, music, Gombeyes and celebration of the theme "*What we Share*", while engaging with locals and being provided with narrative on the cultural relevance of the event.

Bermuda Heroes Weekend (BHW), which is internationally-known for its water raft-up event, saw an increase in events and activities for carnival revellers travelling to the island this year. The weekend saw more participants at the annual J'ouvert and various promoter events, while more spectators lined the streets to view the Parade of Bands. The buzz throughout the island and informal feedback received from overseas guests, media and performers shows that BHW has become a must-experience, staple event on the global carnival circuit among carnival chasers and adventure seekers. Over 800 visitors participated in another highly successful BHW event.

During the summer, the BTA piloted a new entertainment initiative called **Made in Bermuda Nights**, which saw Bermuda's top local band, Wall Street, along with an array of artists perform every week, from July 5 to August 30, on White's Island. The goal of this initiative was to provide guests an after-dinner nightlife offering that transformed a unique Bermuda asset into a popular destination. *Made in Bermuda Nights* attracted a total of 3,395 local and visiting attendees over the eight-week period.

In partnership with the Department of Community & Cultural Affairs, the BTA piloted its first *visitor package* around the **International Gombey Festival** on October 6. Certified Tourism Ambassadors and a local Gombey enthusiast hosted visitors who had purchased the trial package. This immersive cultural experience at one of Bermuda's most popular fall offerings, exposed guests to the cultural significance of Gombeyes along with dynamic live performances. Guests enjoyed a pre-event cocktail hour and private photo opportunity with Gombeyes, along with special reserved seating to watch performances by Bermuda Gombey troupes, international stilt walkers and other guests. Visitor feedback was overwhelmingly positive and the pilot sold 26 out of 30 packages. There is potential to replicate and expand the package for this and other events.

The first of the additional **Destination Dockyard** weekly series launched on Monday July 23, featuring a variety of Bermuda-inspired local vendors and entertainment, and family-friendly activities. BTA partnered with WEDCO on this initiative, which ran every Monday through to September 24.



Expanding our culinary experience for visitors during the fall, the Bermuda Food Truck Festival evolved into the **Bermuda Street Food Festival** on October 28. The event was designed to provide visitors and residents with wider options highlighting Bermuda's diverse food culture. Participants included food trucks, pop-up vendors and local "mom and pop" businesses from across the island.

First-time participants included *Big B's Barbeque*, *Sid's Seafood*, *St. David's Seafood*, *Simple Café*, *Jamaican Grill*, *Confections* and the Dockyard Brewing Company, *Beerpod*. In total, this first-time event registered 1,771 attendees, of which 611 were cruise and air visitors.

The BTA's new partnership with Airbnb will see locally-led Bermuda experiences hosted on the popular online lodging and hospitality site commencing Spring 2019. Airbnb Experiences are activities designed to provide visitors with a unique look at a destination through the lens of a local resident. To prepare the community for the launch of this new initiative, the BTA hosted two **Airbnb Experiences Information Sessions** with Airbnb representatives on November 28-29. Over 130 people attended the sessions, showing a high level of enthusiasm and engagement for this new opportunity for local experience providers. It is anticipated that Airbnb Bermuda Experiences will formally launch by April 2019.

Sports Tourism Strategy

Sports tourism is an evolving area for Bermuda, the highlight for 2018 being the World Triathlon Series, and Bermuda's own winning athlete, World Champion Flora Duffy. There were also many other sports events in 2018 that drove more first-time visitors and younger visitor demographics than ever before. The highlights of our sports events are given below.

World Triathlon Series (WTS) 2018

Bermuda hosted its first ITU World Triathlon Series (WTS) during the Bermuda Triathlon Festival Weekend from April 26-29, earning 450 local workers and volunteers high praise from the ITU Executive Board and participants for their execution of the event. As an added win for Bermuda, reigning ITU World Champion and Bermudian, Flora Duffy, successfully defended her title on home soil for the first time.

The Elite and Age Group WTS Bermuda race event took place on Saturday April 28, the second event in the 2018 WTS global circuit. A total of 85 Elite Athletes participated, among 304 overseas athletes, including Olympic medalists and WTS Championship winners such as Vicky Holland, Katie Zafres, Rachel Klamer, Mario Mola (the reigning male WTS World Champion) and Henri Schoeman. Based on participant surveys, 96% of the overseas participating athletes expressed very high levels of satisfaction with the event. For local participating athletes, the corresponding figure was 100%.

A grand total of almost 900 visitors travelled to Bermuda for the event, comprising visiting athletes, accompanying family and friends, International Triathlon Union (world governing body) officials and international media. In addition to the event itself, visitors also enjoyed related activities built around the racing, including opening ceremony, kid's duathlon, diverse restaurants and unique island-wide experiences.

Some of the key data results of an event impact study conducted by PricewaterhouseCoopers Advisory Ltd., commissioned by the BTA, were:



The resounding success of the ITU World Triathlon Series gives credence to the BTA's strategy to focus on sports tourism.



On September 11, 2018, the Bermuda Tourism Authority, in conjunction with the Bermuda Triathlon Association, presented Bermuda's bid to host the **ITU World Triathlon Grand Final in 2021**. The ITU Executive Board confirmed the bid and awarded the event to Bermuda. The Grand Final will take place after the island hosts three previously-awarded World Triathlon Series events (2018, 2019, 2020).

In the **World Triathlon Series Bermuda 2018 Impact Study**, PricewaterhouseCoopers wrote: *“Based on prior WTS Grand Final events, approximately 3,000 athletes are expected to participate in the age-group race, with 55 men and 55 women in the elite race and 100 para-triathletes. The estimated incremental on-island spend for the WTS Grand Final is \$13.4 million, which results in an anticipated overall impact on GDP of \$16.6 million.”*

The estimate from PwC would represent a ten-fold return on the \$1.6 million public investment, within a total cost of approximately \$3.5 million.

Planning for WTS 2019 is underway in earnest. Preliminary meetings with the Bermuda Triathlon Association and technical race operations partner Upsolut Sports have taken place and the Local Organising Committee has also resumed operations. The Upsolut team conducted a site visit from August 23-26, for onsite operational reviews and meetings with local authorities, government partners and other participating stakeholders. The dates for next year’s event are April 25-28, 2019.

The 43rd **Bermuda Marathon Weekend** was highly successful and took place from January 12-14. The event featured athletes from Russia, Kenya, Canada, USA, Ukraine, Ethiopia and the UK, making it truly global. The Marathon weekend attracted 650 athletes with a total of 1,300 room nights.

Additional momentum and results were achieved from BTA’s partnership with the **National Sports Centre (NSC)** for **Sports Team Training Camps**. For the first time, we welcomed a track and field team to train at the facility. Western Ontario University visited for their spring training camp and competed in an exhibition track meet against local athletes. Enquiries regarding pre-season training camps have increased and we have attracted new tournaments and collegiate teams under the overall strategy, with high-quality first-time visitors.

Results from the 2018 BTA/National Sport Centre (NSC) partnership, and BTA-supported sports events, focused mainly on non-summer months and included:

- The Western Ontario University (Track and Field) group comprised a total of 65 athletes and support staff, from January 2-9, with a total of 182 room nights.
- The George Washington University (Swim & Dive) group comprised a total of 75 athletes and support staff, from January 2-9, with a total of 210 room nights.

The **Ariel Re Bermuda Rugby 7s** tournament comprised a total of 250 athletes and support staff, from March 17-18. The tournament once again exceeded target visitors and was very successful, both in terms of feedback from participants and extending promotion of Bermuda as a destination for collegiate-level rugby training and competition.

The **Bermuda Triple Challenge** comprised over 80 visitors for the 2018 event. In addition to athletes, the group included the principals of Mud Run Guide, the largest media house within the obstacle racing (OCR) space.

The **Bermuda Triangle Cup** attracted 70 overseas athletes accompanied by their parents for a youth football tournament and training camp from April 15-23. In addition this year, a semi-professional team, the Oakville Blue Devils from Canada, participated for the first time, playing various games against the Bermuda Men’s National Team.

The **Bermuda Volleyball Open** comprised a total of 50 athletes and support staff, from April 15-19. The tournament exceeded target visitors once again, succeeding in extending promotion of Bermuda as a destination for collegiate-level volleyball and in participant feedback.

The **King of the Rock Lacrosse Tournament** is the only international lacrosse tournament held in Bermuda, and this year attracted a total of 85 overseas athletes and family members.

Bermuda hosted the annual **CUT-Caribbean Union of Teachers Games (International Youth Track and Field)** event for the first time, from July 13-14. A total of 225 visitors attended, which included athletes, coaches and parents from across the Caribbean, most staying at Willowbank Resort.

For the 11th consecutive year, the **Bermuda Squash Challenge** took place with 16 teams and 4 international players competing over three-day period, from November 8-10. This event attracted 40 overseas visitors and generated 52 room nights.

The 14th **BLTA Junior ITF Tournament** attracted 42 competitors and their support teams to Bermuda for the event from October 13-20. The tournament generated positive feedback from participants and extended promotion of Bermuda as a prime destination for competitive play.



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Enquiries regarding pre-season sports team training camps have increased and we have attracted new tournaments and collegiate teams under the overall strategy.

The annual **Round the Sound** event took place on October 7, and attracted 327 international visitors who participated in an open-water competitive swim with varying distances.

Golf

The **Grey Goose World Par 3 Golf Tournament** and the annual **Bermuda Ladies Pro-Am Golf Tournament** were both successful events. The Grey Goose World Par 3 brought a total of 129 visitors, including 75 competitors, from Canada, USA, Great Britain, Ireland, Wales, Spain, Germany and Sweden. The Ladies Pro-Am Golf Tournament marked its 21st anniversary, bringing approximately 65 players and first-time visitors, including LPGA golf professionals and lady amateurs.

The **Goslings Invitational** Golf Tournament, which took place from November 26-30, welcomed 80 participants with a total of 210 room nights. This year the tournament introduced new format changes to enhance the overall experience from the standpoint of tournament play and social elements.

The 66th **Goodwill Golf Invitational** tournament took place from December 2-5, attracting 30 teams and a total of 110 players, generating a total of 250 room nights.

Sailing

Our extended 2018 sailing season began in March and ran through to July, comprising six high-profile regattas.

Kicking off the sailing calendar for 2018, the **Moth World Championship** saw 100 sailors participate, many of them competing for the first time in Bermuda waters. It was also the first time the World Championships event took place in Bermuda.

In conjunction with the Royal Bermuda Yacht Club (RBYC), the bi-annual **Newport to Bermuda** event attracted over 160 visiting yachts from June 19-26. This level of participation resulted in more than 1,500 visitors.

Under the auspices of the Royal Hamilton Amateur Dinghy Club, the **Annapolis to Bermuda Race** took place from June 8-15. The event was very successful, attracting 27 participating yachts and over 300 visitors.

The RBYC also, in association with Antigua Sailing Week, coordinated the second annual **Antigua to Bermuda Race** from May 9-17. The event comprised of 20 competing yachts and over 280 visitors, an impressive result for a second-time regatta. There was also extensive coverage throughout key sailing media.

The return of the **Argo Gold Cup** after a three-year hiatus was a welcome addition to the 2018 sailing calendar, taking place from May 6-13. The regatta comprised of 20 yachts and over 200 visitors, attracting world-class match-racing talent and featured one-design IOD keelboats, building on the legacy of Bermuda's sailing heritage.

BTA's partnership with Hamburg's prestigious NRV Yacht Club for the **Atlantic Anniversary Regatta (AAR)** was a great success. Feedback from the NRV team and HNW "Experience Seeker" participants was very positive for their first Bermuda regatta. Sailors included several multiple-time America's Cup winners. The Bermuda-Hamburg leg of the race started from St. David's Lighthouse on July 8, with a final count of more than 160 sailors from 14 different countries.

The 2nd **Bermuda Pilot Gigs Regatta** was another successful event on Bermuda's sailing calendar and took place from October 21-27. The Regatta attracted visitors mainly from the UK and Europe. The event hosted 60 international visitors with a total of 312 room nights.



Cruise Strategy

Because cruise planning has a long lead time, 2018 was the first full year where the Bermuda Tourism Authority's strategy for a more balanced cruise season became more apparent. For example, we welcomed totally new Disney Cruise Line calls and additional Viking Ocean Cruises calls. All were scheduled outside the summer months to provide greater seasonal balance and an extended cruise visitor season, as we also continue seeking additional calls to St. George's and Hamilton. These occasional calls with upscale cruise lines presented added economic opportunities for tourism industry stakeholders and other local vendors in October and November particularly. By year end, we had welcomed a total of 180 cruise ships to Bermuda, up 16% over 2017 and contributing to a 28% increase in total leisure visitor spending.

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The schedule will bring 192 calls to Bermuda, and an estimated 544,000 passengers, a rise of 14 percent on the previous year.

To stay engaged with cruise partners, senior leadership from the BTA attended the annual SeaTrade Global Conference to conduct meetings with key cruise line executives. Ongoing meetings also took place on an individual basis throughout the year.

As a result of such dialogue, the 2019 cruise ship schedule is set to expand, with continuous focus on non-summer months. The schedule will bring 192 calls to Bermuda, and an estimated 544,000 passengers, a rise of 14 percent on the previous year. The increase in passengers is expected to generate \$7.9 million in tax revenue and increase visitor spending.

Disney Cruise Line began its inaugural regular Bermuda call schedule beginning October 2018. The *Disney Magic* began a five-call schedule from New York, between October 6-31. *Disney Magic* carries up to 2,700 passengers and 945 crew and berthed at Dockyard.

The P&E Division's work with local entrepreneurs and Disney Port Adventures officials resulted in over 40 new or enhanced Bermuda experiences and excursions being offered to Disney's guests. The goal to provide new opportunities for tourism industry entrepreneurs into the Fall is part of the overall strategy to expand Bermuda cruise ship season. Feedback from local experience operators, as well as Disney guests and management subsequent to the cruises was very positive.

Successful meetings were held with the **Norwegian Cruise Line Holdings (NCLH)** leadership to discuss the 2019 cruise ship season, future development plans, onshore experience development and opportunities related to the ITU Grand Final event. Subsequently, a follow-up site visit by NCLH's head of Destination Services & Shore Excursions took place from December 12-13. A comprehensive schedule of meetings with local experience operators, along with visiting on-island venues and facilities, yielded product development assessments of mutual benefit. Feedback from NCLH was extremely positive as they look to grow and enhance on-island offerings for their guests.

Superyachts

BTA's Superyacht Working group continued to move forward with Bermuda's superyacht strategy. Research and development recommendations to enhance Bermuda's competitiveness as a superyacht destination was completed. A report including the recommendations was provided to the Bermuda Government. As part of local stakeholder outreach activities, an information session was held at Caroline Bay in the first half of the year which saw 35 stakeholders attend to learn about proposed policy and legislative updates. Drafting of the Superyacht Handbook designed to be a resource for captains and owners was also completed. Bermuda remains poised to fully leverage this potentially beneficial segment of the sailing market.



“Smart and powerful collaborations with like-minded brands, media outlets, trade partners and influencers have made a massive difference in bringing Bermuda back into the cultural conversation of our visitor targets in our key feeder markets. This has been a cornerstone of our comeback story.

But it’s only the beginning for Bermuda.”

Victoria Isley, Chief Sales & Marketing Officer, BTA

Overview

This has been yet another successful year, which has seen winning results across the Division in a number of ways. The Sales & Marketing team work extremely well together as a whole to achieve the goals set for the year, whether on-island or in our overseas offices. In the past four years, we have secured strong relations with a variety of media markets and partners to showcase Bermuda’s capability of attracting visitors from a number of travel markets, whether it be weddings, conferences, sports or pretty much anything under the sun.

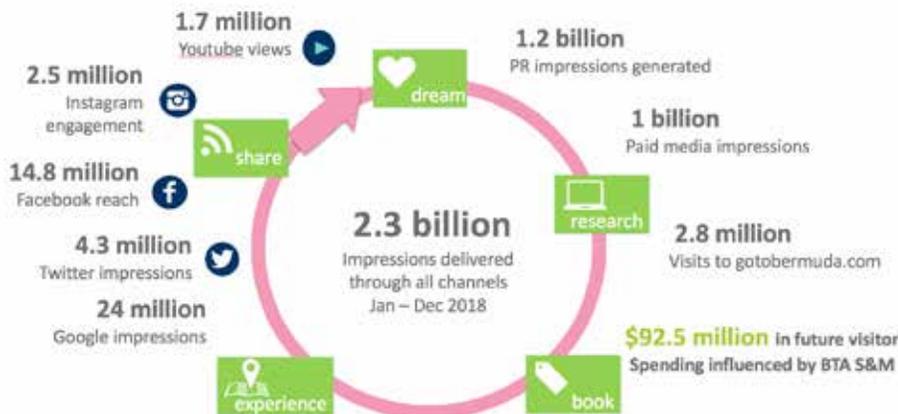
However, 2018 is not only about what the Sales & Marketing Division has achieved for Bermuda’s target markets. It’s also about what we have achieved for ourselves. As strategies evolve and the work load increases, the Division recognised that a higher focus is needed on specific areas for growth so, this year, we hired two exceptional sales leaders, both of whom have a wealth of experience and knowledge in their fields. Simon Boden, having previously worked for Fairmont hotels in Bermuda and abroad, is the new Director of Sales & Business Development in our New York office, while Hazel Clark, a three-time Olympian, has been taken on as our first-ever Director of Sports & Business Development.

What follows is a highlight of some of the efforts that came to fruition in 2018.

Highlights

Over the course of the year, the Sales & Marketing team worked hard to reach Bermuda’s target markets across a wide range of media platforms, with some winning results.

2018 YTD Marketing Snapshot



“The Travel + Leisure cover story is an excellent example of how our public relations team works tirelessly - almost invisibly - to keep Bermuda top of mind for travel writers. As a result of those efforts, Bermuda is on the cover of a magazine that is in the homes of the well-travelled and on just about every newsstand in North America.”

Kevin Dallas, CEO Bermuda Tourism Authority

HSMAI – Award Winning Recognition for the Bermuda Brand

For the second year in a row, the Bermuda Tourism Authority’s work promoting the island to travellers was recognised by the Hotel Sales & Marketing Association International’s (HSMAI) Adrian Awards. The latest accolades include recognition for the efforts to get the TODAY Show to the island in May 2017 for two one-hour broadcasts as a precursor to the 35th America’s Cup.

The HSMAI Adrian Awards competition is comprised of multiple categories in three entry divisions: advertising, public relations, and digital marketing. The Bermuda Tourism Authority won:

- Public Relations: The TODAY Show on-location broadcast from Bermuda received a Gold Adrian Award
- Digital Marketing: The “Out Here” web video series received a Gold Adrian Award
- Digital Marketing: GoToBermuda.com received a Silver Adrian Award

Sales & Business Development



Over the course of 2018, the Sales and Business Development teams were responsible for seeking out, pitching to and bringing a number of influential industry events to Bermuda. These events attracted decisions makers for segments that the BTA are interested in targeting for growth in Bermuda, including family travel, hotel investment, destination weddings and sports tourism.

The **Family Travel Association (FTA) 4th Annual Summit**, a trade-only, conference-style event for 150 leading players and key influencers in family travel was held in Bermuda from October 7-10. Growth in the active family visitor segment is a component of the National Tourism Plan, as tourism industry numbers show growth across all age categories, but particularly children under 17 years-old. Couples with young children are a constant in visitor stats, media and social media, and the BTA want to align Bermuda’s stakeholders to ensure the growth of the family travel market segment by serving it with well-suited on-island experiences.

The **HVS Caribbean Hotel Investment Conference & Operations Summit (CHICOS)** was held for a second year at the Fairmont Southampton, from November 7-9. The 250 attendees at the three-day event represented a wide cross-section of industries involved in hotel investment in the Caribbean, in a number of capacities. The BTA sponsored a ‘Bermuda-themed’ welcome reception for 150 attendees, as well as a post-summit cruise for 50 persons to conclude the conference.

The *MunaLuchi Magazine’s* **Coterie Retreat**, a three-day conference for wedding and event professionals servicing the multicultural market, took place from December 3-5, at the Hamilton Princess & Beach Club. Bermuda was chosen as the location for the 5th annual event, which provided the opportunity to showcase Bermuda to 120 wedding and event professionals. As a sponsor, the BTA hosted a White Party at the Coral Beach Club complete with Bermuda wedding-themed inspirations. We also connected the organisers with local suppliers that extended the on-island spend of the event.



“From cycling the railway trail to snorkelling the reefs, we are excited to showcase the island’s activities and experiences to travel companies, experts and media that cater to active families.”

Victoria Isley,
Chief Sales & Marketing Officer

Looking ahead to 2019, the team successfully secured the **David Tutera Wedding & Event Planning Experience** to take place from April 1-3, 2019, at Rosewood Bermuda. David Tutera is a world-renowned wedding and events planner to the stars, who sees Bermuda as a perfect fit for aligning the island's style and location to the experience. The three days will be transformative, as each day begins with yoga on the island's pink sand beaches followed by hands-on experiences and inspiring speakers, and ending each night with events produced by local event planners at some of our most stunning venues.

The USA Track & Field's Athletes Advisory Committee of 45 high performance athletes and thought leaders gathered for their **2018 Elite Athlete Summit**, which took place from October 18-21, at the Hamilton Princess & Beach Club. The attendees participated in a series of meetings to help set the organisation's strategic goals for the year ahead and provided development training sessions for athletes. Hazel Clark, BTA Director of Sports & Business Development, is a member of USATF and a three-time Olympian. She worked with her colleagues in the sport to attract its annual retreat to Bermuda.

Integrated Partnerships & Promotions

Google Street View is a remarkable tool for travelers, whether they're in the dreaming or planning phase, or on vacation. Google opened the Street View platform to other contributors, allowing destination marketing organisations to contribute content for the first time. Thanks to the work of the Bermuda Tourism Authority and Miles Partnership, Bermuda was the first island destination to have its entire jurisdiction on Google Street View. Since Street View footage of Bermuda had not been captured since 2015, we wanted to proactively capture new footage of the island in addition to covering roads that had never been shot – thereby inviting the world to step into Bermuda, look around and discover the island's unique beauty and character. To accomplish this, we mounted an Insta360 Pro camera to a car and took off to capture the country.

In just six days, the team documented 263 miles of road, expanding the island's Street View coverage by four times. The footage was shot, processed and uploaded in May 2018 and more than 366,000 total images were uploaded to Google Street View in June. Since then, these photos, videos have been viewed more than 8.4 million times, showcasing the island to thousands of potential visitors researching the destination. Every image contains the Bermuda logo and gotobermuda.com website address at the base of the image. Because the traveler is engaging with the Bermuda brand outside of our owned channels and within a trusted source like Google, the partnership reinforces the Bermuda brand as a source of quality information.

Our efforts to improve Bermuda's overall footprint in Google began in 2017, with a concentrated process to encourage local businesses to claim their Google My Business Listings. So far more than 100 Bermuda businesses have claimed their listing.

A series of Bermuda posts and stories were on display in the summer to the 11 million followers of **Beautiful Destinations** on Instagram. All content in the series was part of a paid partnership with Beautiful Destinations and was the first time the BTA worked with the media house, which says it's the "largest travel community on social media," reaching more than 13.5 million people in 180 countries on Instagram, Facebook and Snapchat. One of the instastories, which consisted of 19 segments with six different polls asking the audience to choose the next experience – from cliff jumping and horseback riding to local joints or celebrity chefs, was posted on July 21, reached more than 6.5 million users and generated an exceptionally high level of user engagement. Bermudian talent was instrumental in the creation of the video content in front of and behind the camera. The goal of the paid partnership with Beautiful Destinations was to immerse targeted travellers in the distinct local experiences in Bermuda, while the video also highlighted the short 90-minute flight from New York City and promoted the popular Bermuda Summer Fridays offer.

A partnership between the BTA and *Garden & Gun* magazine cast a publicity spotlight on some of the island's creative minds. Six local entrepreneurs and tastemakers featured in the December/January issue and on the **Garden & Gun website**. With a potential reach of more than half-a-million consumers, and social media posts broadening the reach further, the feature, titled "*Made in Bermuda*" covered:

- Chef Michiko Campbell of *Chiko's Smokey Rub*
- Rickeisha Burgess of *DuchPops*
- Cary Butterfield and Patricia Borland of *HAMEC* resort wear
- Nina Froncioni of *Limestone + Cedar Co.*
- Steve Hollis of *Ocean Sails*
- Stratton Hatfield of *YART* concrete sculptures



"My goal is to inspire, engage and encourage all attendees to share ideas and create a pathway for all to dream bigger. We couldn't imagine a better backdrop than Bermuda with its pastel palettes, pink sand beaches and turquoise blue waters."

David Tutera
Wedding & Event
Planning Experience



"The organising committee has been nothing short of amazing to work with and have ensured that our athletes will have a once in a lifetime experience in Bermuda. We are also excited to bring the world's number one team to Bermuda and experience all the country has to offer."

Jeff Porter
Chair of the USA Track
& Field's Athletes
Advisory Committee





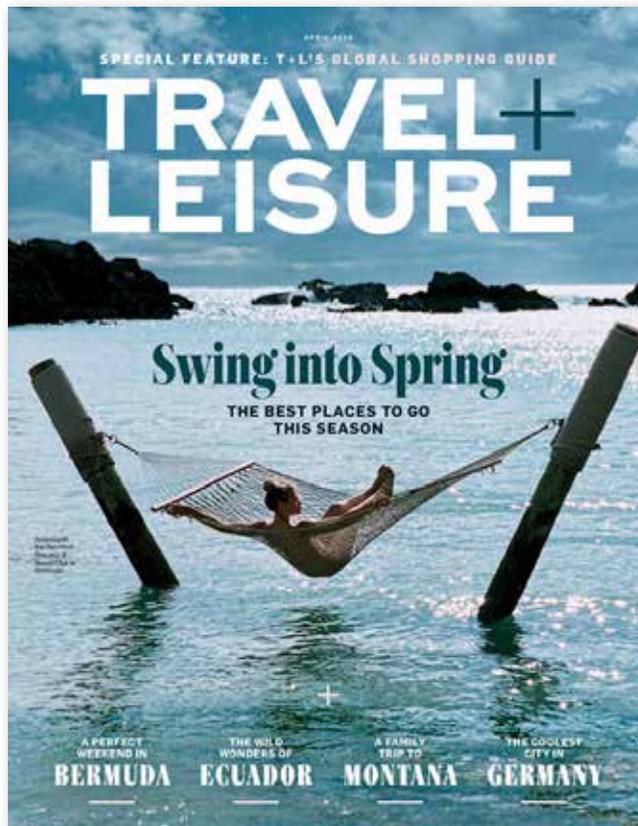
In October, more than 100 *Garden & Gun* readers and **Outstanding in the Field** followers bought vacation packages to Bermuda for a weekend which included a spectacular farm- and sea-to-table dinner at a secluded cove at the Hamilton Princess & Beach Club. The sold-out event also featured dishes prepared by Kamilah Cannonier of Sweet Saak Bakery and Danai Hongwanishkul, the executive chef from Marcus'. Culinary elements showcased Bermyn Fresh, Windy Bank Farm, Wadson's Farm, Pop and Sons Honey, the Blind Pig and Gosling's Rum. Dance and musical performances by Gombey Troupe Evolution and Raven Baksh were also featured.

The BTA's media partnership with the *New York Times Magazine*, which boasts a readership of 3.3 million, resulted in a number of advertorial placements through the year. In May, the advertorial pieces appeared for the summer issue just as Bermuda Summer Fridays kicked off. Bermudian voices in that advertorial included: Philippe Rouja, Bermuda's custodian of shipwrecks; Nicole Golden of Urban Cottage and Malcolm Gosling, Jr. of Gosling's Rum. The pieces covered many Bermuda summertime favourites like Cup Match, Marina Nights, Tobacco Bay bonfires and Big Chill performances. The travel-themed magazine showcased other Bermudians through the year, such as photographers, entrepreneurs and thought leaders to help travellers see the island through their words and images. Meredith Andrews, Nhuri Bashir and Avarie Graham each shared an image they love and dished about what makes living and shooting in Bermuda so special to them. Bermudian fashion model Lily Lightbourn appeared in the women's fashion issue, while Elena Strong, Tom Butterfield and Kristin White were in the culture-themed issue. Damon DeGraff and Shiona Turini, Bermudians living in New York City, also shared their voices as culture influencers.



Media Relations

Bermuda was the cover story in April's edition of *Travel + Leisure*. The magazine's circulation of about 1 million is geared specifically to readers who are well-travelled. While a picture taken at the Hamilton Princess & Beach Club graces the cover, the four-page inside story delves into the island-wide Bermuda experience, particularly how a Bermuda vacation can appeal to couples with young children (the active family target audience). The writer, *Travel + Leisure* Travel Director Jacqueline Gifford, originally experienced the island with the Bermuda Tourism Authority during the 35th America's Cup, and subsequently travelled to Bermuda with her husband and toddler. Many tourism industry stakeholders are mentioned in the article.



Condé Nast Traveler announced the results of its 31st annual Readers' Choice Awards in October, with Bermuda recognised as the #1 Island in the Caribbean and Atlantic Region, while splashing a spectacular photo of Bermuda's shoreline on the cover of the November issue. Nearly half a million *Condé Nast Traveler* readers submitted a record-breaking number of responses rating their travel experiences to provide a full snapshot of where and how we travel today. The Readers' Choice Awards are the longest-running and most prestigious recognition of excellence in the travel industry and are commonly known as "the best of the best of travel." The issue represents two important validations for the BTA as Bermuda's marketers - from consumers who voted Bermuda to the top of the list and from industry experts who deem our destination worthy of a *Condé Nast Traveler* cover.



Triathlete Magazine published a number of excellent articles, written by Kelly O'Mara and Liz Hichens, on Flora Duffy and Bermuda during the course of the year. The stories not only showcased Flora Duffy's long journey to becoming a world champion in the sport, but also covered her life and the pressures she faced on a daily basis, as well as giving a great insight into Bermuda experiences. *Triathlete Magazine* has a readership of 86,686 and is recognised as the world's leading triathlon resource for training and nutrition guidance, product reviews and advice from pros, top coaches and experts.

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"This is one of the biggest PR moments of the year for our tourism community and the Bermuda Tourism Authority is incredibly proud to share these honours with our partners across the island."

Kevin Dallas
CEO, Bermuda Tourism Authority



In June, Bermuda was featured in **CNN Travel's** 'A year of the world's *Best Beaches*' series. In the story "**A Bermuda triangle: Where to eat, stay and play**", by Brekke Fletcher, readers were given an insight into the history of the island as well as what they could expect to see and do once they were here, with a number of recommendations for all types of traveler. While the focal point of the series is to showcase a year's worth (one week at a time) of the most stunning beaches around the world, the stories cover the entire destination as well, making travel to the destination that much more attractive.

Strategic, Limited Retail Sales

In 2018, BTA worked with hotel and airline partners to coordinate two targeted retail sale periods to build incremental demand for Bermuda. The Pink Sale ran from December 26, 2017 to January 23, 2018, targeting the US and Canada. The Splash Sale ran in September and October, and targeted Canada and the US. Both sales were run in the United Kingdom as well. While figures were slightly less than in the previous year, they were still well above the original totals from 2016.

Pink Sale Performance

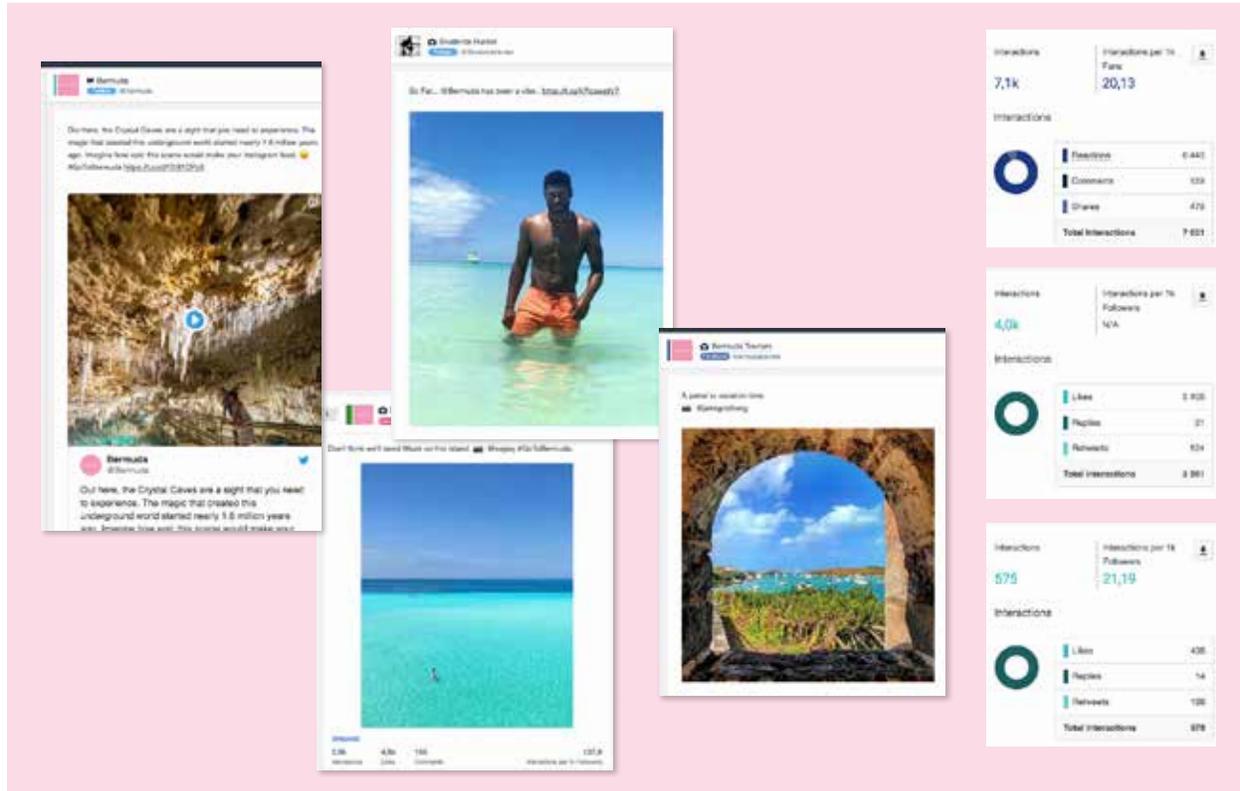
KEY METRICS	2018	2017 ACTUAL	% Δ GROWTH FROM 2017	2016 ACTUAL	% Δ GROWTH FROM 2016
Website Sessions	169,344	234,427	-28%	171,857	36%
Pink Sale Page Sessions	137,396	180,345	-24%	146,824	23%
Exit Link Clicks (to hotel partners)	28,730	N/A		N/A	
Total Reservations	5,777	6,594	-12%	4,428	49%
Room Nights	26,163	30,608	-15%	19,900	54%
Direct Visitor Spending	\$14 million	\$14.6 million	-4%	\$8.8 million	66%
ROI	35-1	24-1		14-1	

Splash Sale Performance

KEY METRICS	2018	2017 ACTUAL	% Δ GROWTH FROM 2017	2016 ACTUAL	% Δ GROWTH FROM 2016
Website Sessions	440,480	244,879	80%	284,235	-14%
Splash Sale Page Views	294,825	141,069	109%	130,265	8%
Exit Link Clicks (to hotel partners)	45,598	59,391	-23%	34,542	72%
Total Reservations	1,585	2,400	-34%	2,339	3%
Room Nights	6,959	10,874	-36%	19,414	4%
Direct Visitor Spending	\$6 million	\$7 million	-14%	\$6 million	15%
ROI	16-1	20-1		19-1	

Social Media

Top Performing Post for the year in each channel:



Increasing Followers & Maximising Engagement

In 2018, the Bermuda Tourism Authority team focused efforts on growing social communities while primarily concentrating on growing engagement through a number of strategies. The pay-off was significant – followers grew from 3 to 36 percent in channels and engagement grew by a whopping 70 to 190 percent.

	2018 PAGE LIKES/FOLLOWERS	GROWTH IN PAGE LIKES/FOLLOWERS YOY	GROWTH IN ENGAGEMENT YOY
Facebook - @BermudaTourism	357,414	3%	85%
Instagram - @Bermuda	58,074	36%	190%
Twitter - @Bermuda	27,859	8%	70%

The road to such massive growth in engagement was paved with deliberate strategies:

- Mini-campaigns (such as Kiteboarding)** - Focusing on people's passions allows for targeted advertising, authentic engagement and leveraging key influencers in the market. This particular campaign achieved incredible saturation in the target market, for a very cost-effective investment in content marketing. With a total target market of 390,000 kiteboarders, the campaign generated 358,000 social media engagements. Social media posts and ads using new content delivered engagement numbers that are mostly unheard of in the travel industry: Instagram ads had a 28% average engagement rate and Facebook ads had a 91% average engagement rate. In other words, during phase three, the number of Facebook engagements (124,125) almost matched the total number of kiteboarders reached on Facebook (136,771), a stunning success. Equally exciting, this project showed an overall engagement rate of 38.7%.





The pink-hued lifeguard tower, built by Bermudian carpenters for the Revolve event, was stationed on the beach at Rosewood Bermuda, and it was such a hit that the resort purchased it at the end of the event.

The campaign even spread offline to niche publications when *The Kiteboarder Magazine* published a feature using the new images, creating even more authentic stories told by experts, completely focused on the kiteboarding audience.

- **Integrating other marketing efforts into social** - We leveraged other unique marketing opportunities executed on or off the island by incorporating them strategically and thoughtfully into our social content. For example, by balancing the curated content from influencer programmes (*Revolve*), brand partnerships (*Beautiful Destinations*) and various pieces of PR coverage (*CNN*, *Condé Nast*, etc.). Through the *Revolve* partnership in conjunction with Rosewood Bermuda, we secured over 75 of the top fashion and lifestyle influencers to visit the island, resulting in over 300 social media posts garnering 300+ million views.
- **Curating genuine and engaging assets (UGC, video, and still assets) with visitor-target led content strategy** - There is always a need to curate and develop new and authentic assets to help drive engagement of our social content. By collaborating with partners, UGC and developing our own assets, we were able to develop new images and video assets that showcased Bermuda for all seasons. For instance, we now have brand storytelling assets ranging from Gombey Life and holiday traditions to Cup Match Culture and food culture. All content was targeted to the various audience types, such as active families, experience enthusiasts, jet-setters, etc., to ensure the right content reached the right audience. By integrating this content into our social calendar, we were able to spread awareness and engagement to our social audience about these initiatives to further motivate them to visit the island.





“It’s difficult to win without a solid game plan; the National Tourism Plan was created to be Bermuda’s winning strategy. An enormous amount of effort, research and collaboration went into writing the country’s strategic vision so that we successfully build upon the victories of the last three years.”

Glenn Jones, Director of Strategy & Corporate Communications

Overview

In 2018, the Bermuda Tourism Authority placed a greater emphasis on strategic planning as it moved to create the next chapter of Bermuda’s National Tourism Plan. Importantly, strategy was combined with the BTA’s corporate communications work – ensuring that stakeholders were not only kept informed of BTA plans, but provided opportunities for all to get involved and align their own interests to increase the likelihood of industry-wide success. Some of the most important plans, strategies and outreach held during the year have been highlighted here.

National Tourism Plan

Hundreds of Bermuda tourism stakeholders participated in interviews and working groups to shape the country’s National Tourism Plan. Additionally, nearly 800 members of the public weighed in via telephone and online surveys. The collaborative approach undertaken to complete this plan was essential. It was critically important that the National Tourism Plan not merely be the Bermuda Tourism Authority’s plan, but the country’s plan.



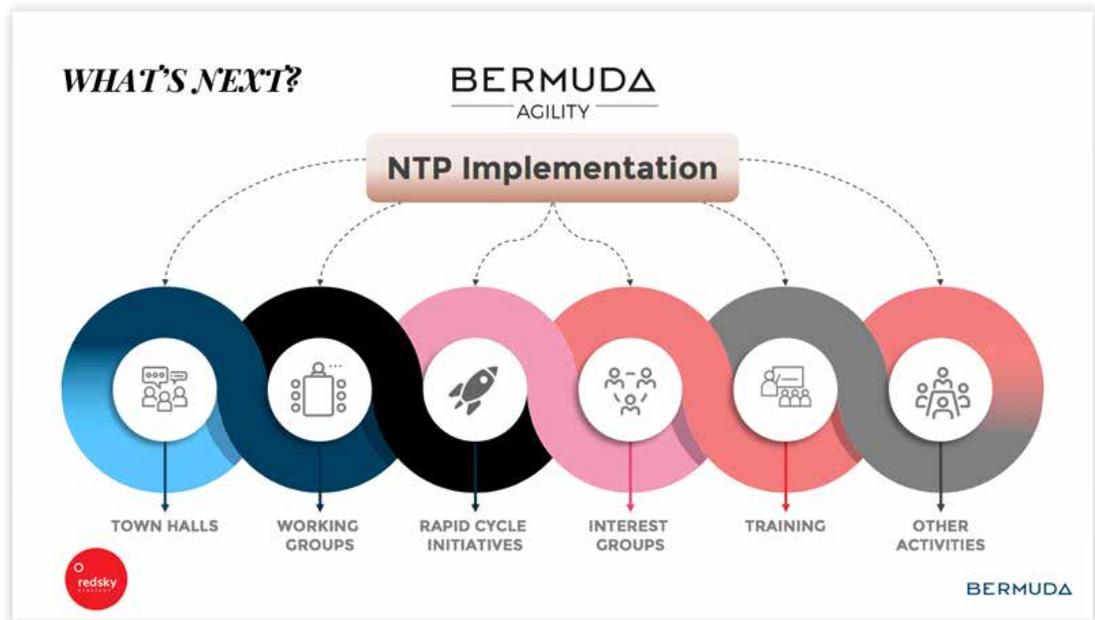
It was critically important that the National Tourism Plan not merely be the Bermuda Tourism Authority’s plan, but the country’s plan.





True to the mission of collaboration, partners from the private and public sector helped the BTA present the plan to the public at the summit.

As 2018 came to a close, it was clear that the same commitment to collaboration used to create the plan will also be required to execute it. Working groups – including members of the BTA team, partners from the public sector and stakeholders from the private sector – are now tasked with working together to champion the action items in the plan. Additionally, public forums will be an important tool for engaging the public in making the plan a reality. By the end of 2018, a comprehensive implementation strategy was underway.



With the help of RedSky Strategy, a consulting firm in New York City which worked under the direction of the BTA, it took about eight months to complete the National Tourism Plan. Qualitative and quantitative research is the backbone of the document. It was made public for the first time at the Bermuda Tourism Summit in October. Summit delegates received a comprehensive overview of the plan as part of the day's agenda and left with an abridged version of the document. True to the mission of collaboration, partners from the private and public sector helped the BTA present the plan to the public at the summit.



Although the final plan is more than 100 pages long, it was important to distill the most salient points onto one page. That page allows all stakeholders to comprehend the general direction of the country’s tourism future and, if they choose, align themselves with it. And just as importantly, the strategy on a page gives the public an opportunity to hold tourism decision makers accountable for executing the plan. The full National Tourism Plan is available to stakeholders online via BTACConnect.

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: <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 	Cities FOCUS: New York City, Boston, Washington, DC, Philadelphia, Toronto NURTURE: Baltimore, Hartford, Atlanta, Chicago, Dallas, San Francisco					
	Target Visitors THE ADVENTURE SEEKER Experience ENTHUSIAST worthy JETSETTER Active FAMILIES					
	Need States Seeking Experiences Adult/ Couples Retreat Family Fun & Bonding Getaway					
	Strategic Pillars A: AWARENESS & RELEVANCE (Differentiating Bermuda) G: GREENER (Growing By Being Pink, Blue + Greener) I: INFRASTRUCTURE (Building Frictionless Experiences) L: LOCAL INVOLVEMENT (Growing Through People) I: INNOVATION (Thinking Like a Visitor) T: TEAMS AND GROUPS (Growing Through Groups) Y: YEAR-ROUND (Embracing Seasonality)					

Beach Economy

To provide some context and background, in May 2016, after 15 months of consultation and research with political parties, environmental groups, civil servants and tourism stakeholders, the Bermuda Tourism Authority presented a final Beach Economy strategy paper to the Government of Bermuda. Just over a year later, in their 2017 Election Platforms, both political parties outlined a desire for a more vibrant beach economy that will provide opportunities to local entrepreneurs and meet the demands of visitors.



Photos of similar containers intended for use at Shelly Bay Beach.

In his budget speech to Parliament in February 2018, the Minister of Economic Development & Tourism ringfenced \$100,000 in the Bermuda Tourism Authority's grant allocation to create economic opportunities for small business owners in a beach economy. It was agreed that these funds would be used only on beach economy initiatives and were earmarked to get experiences at Shelly Bay underway and, potentially, John Smith's Bay as well.

In March, the project vision was shared with the three elected officials with constituencies in or neighbouring Shelly Bay. The meetings included MPs Derrick Burgess, Tinee Furbert and Wayne Furbert. All three Parliamentarians encouraged the Bermuda Tourism Authority to continue its work and an agreement was made to take the vision directly to the people of Hamilton Parish once the ideas were more fully matured.

In May, the Ministry of Public Works, which includes the Department of Parks, signed a Memorandum of Understanding with the Bermuda Tourism Authority to guide the way forward on introducing concessions at Shelly Bay Park and John Smith's Bay Park. The money from the ringfenced Ministry budget was used to purchase new containers to deploy at Shelly Bay.

In June, the Bermuda Tourism Authority and Ministry of Public Works held a public forum in Hamilton Parish to discuss the Shelly Bay beach economy plan in greater detail, which followed through on a commitment to share the vision with the people of Hamilton Parish. The BTA then put out an RFP to recruit entrepreneurs interested in operating beach concessions at Shelly Bay that would appeal to families and submitted a planning application for the placement of non-permanent beach concessions at Shelly Bay within shipping containers. The application included an endorsement letter from the Ministry of Public Works.

In July, a group not present at the public forum, but opposed to concessions at Shelly Bay, organised against the project. In response, the BTA penned an open letter on the Shelly Bay plan in support of entrepreneurs who would like to operate there and published a chart to show the public that its use of Shelly Bay would not be restricted in any way. The Minister of Public Works also delivered a Ministerial Statement that voiced strong support for the plan at Shelly Bay and lauded the collaborative approach deployed to create the plan.



In August, after four finalists were identified in the RFP process, the BTA promoted a demo night so that the public could become familiar with the concessions that might be available at the beach for beachgoers. The finalists included:

- **Ashley's Lemonade**, a Bermuda brand that is the epitome of mom and pop entrepreneurship
- **Simple Café**, a beachside deli-café idea from Hamilton Parish residents
- **Smokin' Barrel**, a chicken and ribs food truck
- **Tarzan Boats**, an adventurous water experience from a Hamilton Parish youth football coach that includes beach equipment rentals

Public Use of Shelly Bay Beach & Park		
ACTIVITY	TODAY	With CONCESSIONS
Picnicking	✓	✓
Bring Your Own Cooler, Food	✓	✓
Free & Unrestricted Access to the Beach	✓	✓
Use of the Playground	✓	✓
Swimming, Sunbathing	✓	✓
Watching Sunsets	✓	✓
Host Children's Parties, Summer Camps	✓	✓
Building Sandcastles	✓	✓
Use of the Railway Trail	✓	✓
Use of the Playing Fields	✓	✓
Holiday Camping Site	✓	✓
Buy Refreshments	✓	✓
Enjoy Scheduled Family Activities	✓	✓



Amid public pressure from a group of people opposed to concessions at Shelly Bay, the Government withdrew its support for the plan outlined in the Memorandum of Understanding and the entrepreneurs were notified accordingly. Nonetheless, the demo went ahead with the qualified mom and pop vendors who submitted proposals to operate in the area and they performed admirably. The BTA has retained good working relationships with them all.

Meantime, the BTA will examine other ways to improve the on-island experience at beaches, particularly for active families – a visitor target that is expected to grow, according to National Tourism Plan findings.

Domestic Partnerships Act

The Domestic Partnership Act was widely covered in the media throughout 2018, with an estimate of more than 3,600 articles mentioning the act, marriage equality and gay rights in the destination.

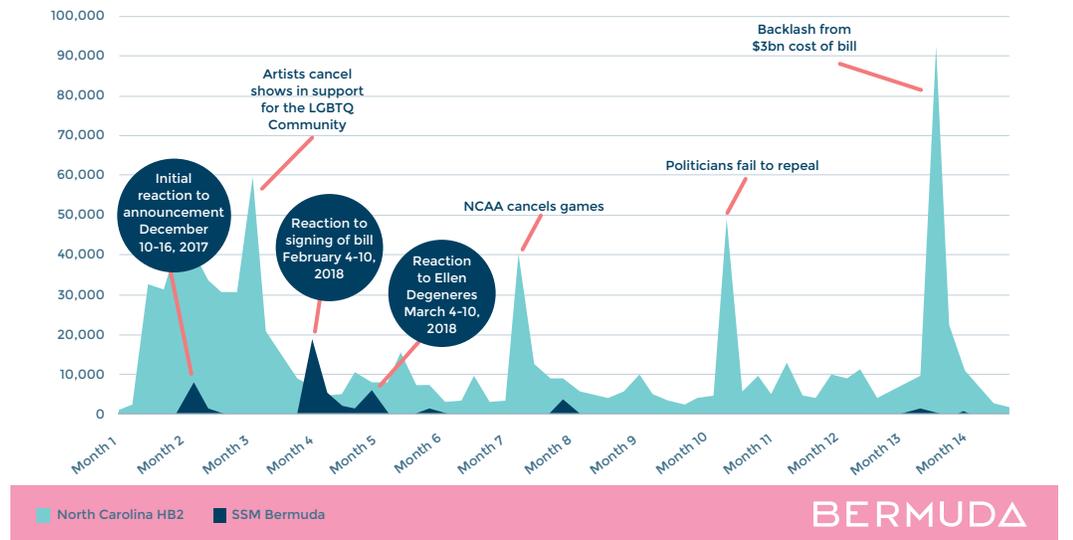
Media coverage on the issue saw distinct spikes after each announcement/development:

- The February announcement that the law was signed into power by the governor saw the highest spike in coverage (more than 1,700 articles);
- In June, the Domestic Partnership Act took effect but was overturned days later, resulting in another spike (more than 560 articles);
- And again with the news that the government was appealing the June decision in the Court of Appeals in November (more than 250 articles.)

Coverage was spread internationally, with the US seeing the highest percentage (61% of coverage), followed by the UK (13%) and Bermuda (8%). The aggregate readership of all coverage exceeded eight billion. While Twitter was the dominant place for the conversation on social media, Facebook was the social platform that drove the most engagement, with an estimate of more than 240,000 shares of articles.

Conversation Timeline

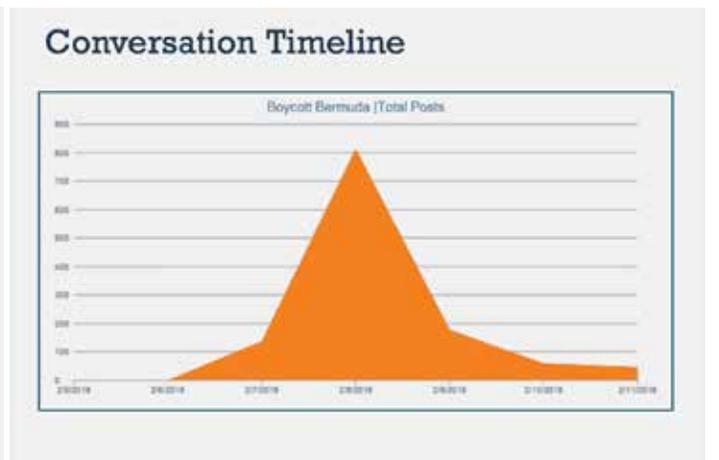
To better understand the size and scale and potential future path for Bermuda, we overlaid the conversation timeline with the online conversation in regards to North Carolina's Bill HB2.



In February the “Boycott Bermuda” conversation peaked as an extension of the Domestic Partnership Act. The peak of this conversation was on February 8.

Boycott Bermuda

We've seen a significant rise in conversations around canceling, boycotting and guilting those travelling to Bermuda from the advocate and activist crowd.



In order to mitigate any potential negative impact on the island’s tourism industry, the Bermuda Tourism Authority took a series of important steps:

- Created informative FAQ on GoToBermuda.com
- Collaborated on FAQ page for Ministry of Home Affairs website
- Engaged with international media, including publications serving LGBT audiences
- Responded to 100% of email messages voicing concern to the BTA, either sent directly or via stakeholders
- Collaborated/Consulted with tourism minister on communications response

As evidenced on social media, most consumers were having a visceral reaction to news headlines – voicing displeasure before reading or researching the entire story. Travellers were also making boycott decisions based on those headlines.

Once the volume of initial reactions waned, the Bermuda Tourism Authority worked diligently and strategically to find media opportunities that afforded an opportunity to put the Domestic Partnership law into context. Not all media were willing to engage for fear that their readers would react angrily to any sympathetic coverage of Bermuda, but some media were indeed willing to hear a fresh angle – especially given the Bermuda Tourism Authority’s perceived credibility on the issue, having sounded a warning before the law was passed. The message points were clear:

- Bermuda has anti-discrimination protection for LGBT community, a legal protection not enjoyed by many islands in the Caribbean and some parts of the United States
- For example, in 28 US states and most Caribbean countries a person can be fired for being gay
- Bermuda has Immigration rights for same sex partners and allows adoption for couples – two important legal victories for the island’s LGBT community
- Prop 8 in California banned same sex marriage in 2008 after marriage licenses were issued to gay couples. That ban lasted until 2013. This showed America consumers that the pathway to equality for LGBT communities is sometimes a winding road.

BTA Tourism Summit



An unveiling of the 2018 National Tourism Plan took place at the Bermuda Tourism Summit on October 24. The day-long gathering of industry stakeholders, community leaders and partners from around the globe focused on a theme of elevating the island to the NEXT LEVEL of tourism resurgence.

“How Bermuda’s tourism sector grows from here was the focal point of the summit,” said Chief Executive Kevin Dallas. *“The National Tourism Plan gives us a solid platform upon which to have that conversation, because it contains the research we need for building a smart, collaborative strategy through 2025.”*

In addition to the release of the National Tourism Plan, the Bermuda Tourism Summit Agenda included workshops on the vacation rental market, a panel on international tour operators and the launch of a new online portal for tourism industry stakeholders called BTACConnect. Google Destinations, TripAdvisor and the National Service Standards Programme also provided information and service to delegates at the summit.

”
The volume of negative sentiment arising from the same-sex marriage conversation online surpassed the positive sentiment generated by the America’s Cup in 2017, according to social media experts at Destination Think!.



Reach of Conversation – 1.7 Billion





“Total visitor spending rose past \$500 million in 2018, the third year of consistent growth in the island’s tourism economy. The Bermuda Tourism Authority is positioning the industry for continued economic success with strategic programmes in service standards, visitor information services and an improved Certified Tourism Ambassador Programme.”

Karla Lacey, Chief Operations Officer, BTA

Overview

Apart from being responsible for the inner workings of the BTA, the Operations Division has, in 2018, focused largely on the standards of services to Bermuda’s visitors at the front line. Looking for ways to enhance the programmes already in place for businesses to achieve and maintain a high standard of service, the BTA has also taken ownership of the Bermuda Visitor Service Centres, ensuring that they support the BTA brand.

Public and Stakeholder Relations is another area of the Operations Division that is critical in striking a balance on the island. For not only does the team have to represent matters of importance to Bermuda’s visitors, they also need to generate interest and get the buy-in of Bermuda’s public for plans under the BTA.

With all of the above in mind, we present here some of the highlights from this year’s activities, events and efforts.

Human Resources

As at December 31, 2018, BTA had 43 employees in the Bermuda and New York offices, versus a total of 39 employees by the end of 2017. This includes 41 full-time permanent, one full-time fixed term contract, and one intern.

In January, the BTA began the restructure of the organisation to be in line with best practice of other global Destination Marketing Organisations. During this period, it saw the elimination of some roles which were deemed defunct. This also included revising other roles and responsibilities within the organisation.

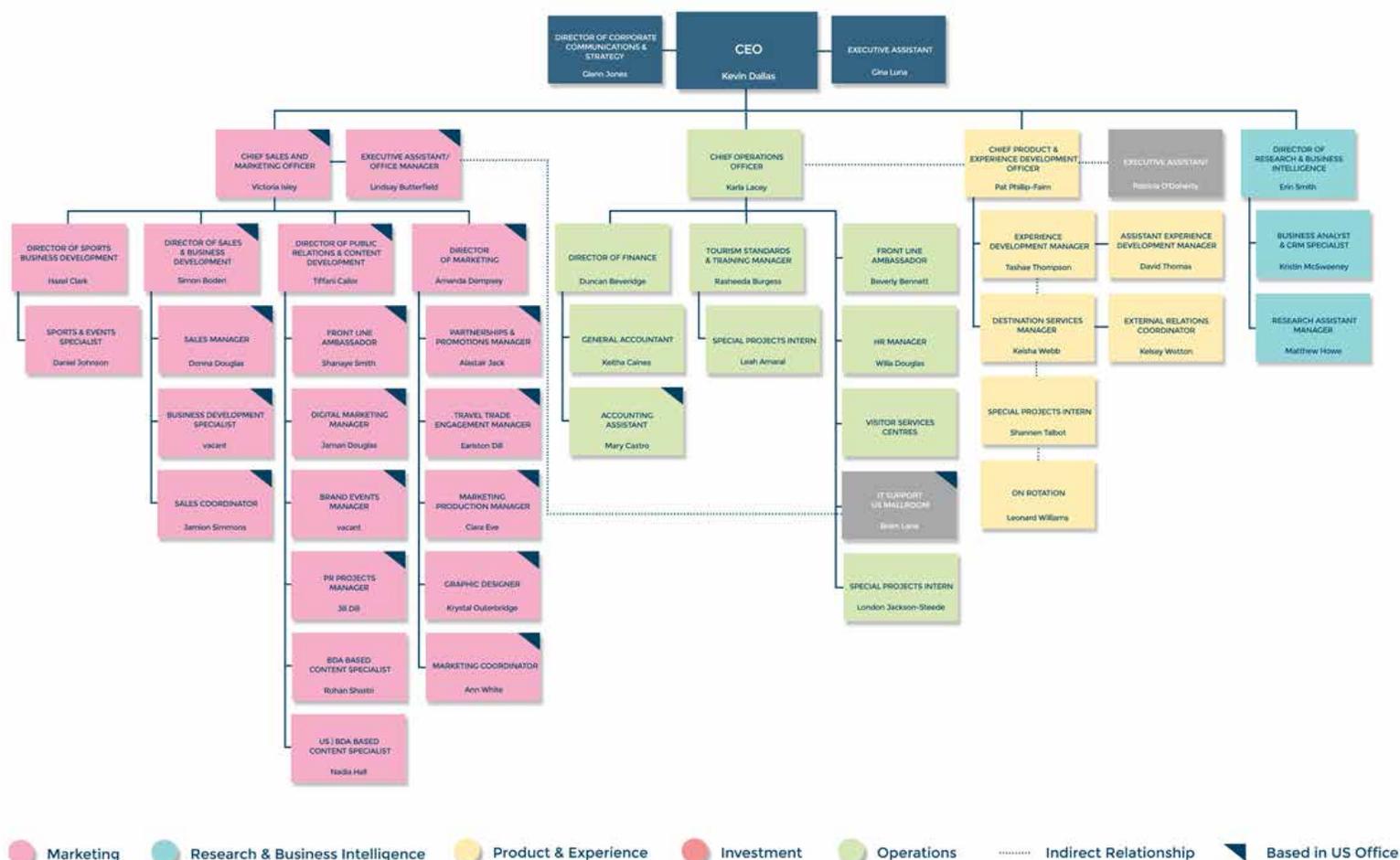
In November, Chief Investment Officer (CIO), Roland “Andy” Burrows, resigned his position with the BTA. Both the CIO and the Assistant Investment Manager position, which was a direct report, transitioned to the Bermuda Development Agency on December 1, 2018.

During the course of the year, a total of eight new positions were filled at the BTA, six young persons interned and job descriptions were updated and/or realigned for six employees. In addition to filling approximately 40 seasonal visitor service ambassador positions by the second quarter, a Manager of Operations was recruited at end of the fourth quarter for the Bermuda Visitor Services Centre Ltd. (BVSC). BVSC is a wholly owned subsidiary of the Bermuda Tourism Authority.



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Bermuda Tourism Authority Organisational Chart



PATI Disclosures

In response to a PATI request for a detailed listing of all 2014 incentives payments to BTA staff, the Information Commissioner (IC) ruled that the information be 'banded in ranges' by position title, salary, incentive percentage and dollar amount. This ruling already aligned with what the BTA had previously released publicly for the same year, with the presentation further refined.

The BTA received one PATI request in 2018, for which the requested information was provided within the process timeline.

Vacation Rental Properties

The Vacation Rentals Act 2018 became law on July 1, 2018. As an amendment to the Hotel Licensing Act, the legislation defines Vacation Rental Properties (VRP) as a property that sleeps less than 10 persons, requires all vacation rental properties to register with the Government, and requires all VRP to collect a 4.5% fee from visitors and remit the fee to the BTA. The latter mirrors legislation requiring the same visitor fee collection and remit process via licensed hotel properties.

Information packages for vacation rental property owners, including frequently asked questions regarding the visitor fee collection and remittance process, brochures and activity guides, were made available to all registered properties. Contained in a handy 'Welcome to Bermuda', the packages were designed for properties to share with their guests. The FAQ's can also be downloaded from BTA's website bermudaVRP.com.

Implementation of the reporting and fee collection process started in November, via the BTA's stakeholder portal 'BTA Connect'. VRP registered with the Bermuda Government received directions on the use of the portal to file the required data on visitor stays for the relevant month (beginning with November 2018), as well as how to calculate and remit the 4.5% fee where required.

Training & Standards

National Service Standards Programme (NSSP)

Through the year, the Standards and Training team focused on the promotion and execution of the National Service Standards Programme, including the application process and creating more value for NSSP-certified businesses. The following additional benefits were rolled out to further promote certified businesses to visitors and locals:

- Acknowledgement of certification in *Destination Magazine* – in partnership with *Destination Magazine*, a two-page spread highlighting how Bermuda businesses are raising the bar for service was featured in their new 2018 publication. This spread was put together as a promotional piece to raise the profile of certified businesses by targeting visitors arriving into the island
- Business promotional videos – in collaboration with Bermuda Media, 16 separate promotional videos were created for the programme, each exclusively featuring one current certified business. These videos, which demonstrate the importance and pride in gaining certification, will be used in promotional efforts during the fall application process
- Relevant NSSP certified businesses were added into the Uncover Bermuda seasonal brochures with a seal of approval included in their business listing. A notation at the beginning of the brochure informs visitors that the seal demonstrates a company's commitment to service excellence
- Special Facebook highlight and congratulations
- Acknowledgment at our annual Tourism Summit
- Promotional videos displayed in local theatres
- Videos placed on business profiles on GoToBermuda.com



NSSP Fall promotion

Among the activities that were undertaken as part of the NSSP Fall promotion was a National Service Standards Luncheon. Held in partnership with Best of Bermuda, the occasion resulted in a list of businesses for the BTA to target for inclusion in the National Service Standards Programme. This initiative helped to expose the NSSP to new businesses as well as congratulate them, over lunch, on their recent earning of the Best of Bermuda award.

In addition, the Standards & Training team promoted the opening of the Fall application process (September 7-12) by appearing on radio interviews on Ocean 89 and Power 95, with two NSSP certified businesses at each, and debuted the promotional videos of additional certified businesses during the week of September 10-14, during ZBM Evening News spots.

The teams continued promotional efforts resulted in 13 new businesses from multiple industry sectors registering for the programme during the fall intake process.

Recertified & Newly Certified Businesses

The total number of certified businesses as of December 2018 stands at 18; all have been awarded the Bermuda national seal of approval for their dedication to service in Bermuda.

- 27 Century Boutique
- Alexandra Mosher Studios
- Beauty Queen Day Spa
- Bermuda Bride
- Bermuda Fun Golf
- Bermuda Transit
- Choxstix Fusion
- Dolphin Quest
- Flanagan's Irish Pub
- Inverurie Executive Suites
- Lili Bermuda – Front Street
- Newstead Belmont Hills Golf Resort and Spa
- PTIX
- The Bermuda Perfumery (St. George's)
- Tobacco Bay
- Tuck INN Rentals
- Rosedon Hotel
- & Partners



Certified Tourism Ambassador (CTA) Programme

The BTA has now taken full ownership of the CTA programme after a transition from the Bermuda Hospitality Institute (BHI), with the Standards & Training team handling all activities and administration for the programme.

At the start of the year, a training schedule for CTAs was publicly released. Eight courses were allotted for the year (four in the Winter/Spring period and four in the Fall/Winter period), with all classes fully booked. The cost for registration was \$49 per person, and all collateral material was updated to reflect the BTA brand.

Certified Tourism Ambassador (CTA) Star Awards

New in 2018 was the CTA Star Awards for those Ambassadors who demonstrated their commitment to Bermuda on the front line. Individuals were nominated by their peers for any of the six tourism sectors, as well as a general sector for non-tourism related professions who are exemplary CTAs.

In partnership with the BHI, the BTA held a networking and appreciation event for CTAs at the end of April to close out Hospitality Month. Fun Golf Bermuda, an NSSP-certified business, hosted the event at their location free of charge. The evening consisted of complimentary rounds of golf and refreshments with a DJ playing great music in the background. The event was also used to recognise the CTA Stars publicly as they received a glass star trophy for their dedication to service.

The winners of the 2018 CTA Star Awards were:

- Dwayne Caines - *Accommodations Sector*
- Phillip Anderson - *Travel Services Sector*
- Alec DeSilva - *Transportation Sector*
- John Dale - *Recreation & Entertainment*
- Dee Simmons - *Local Ambassador*
- Gary Pitt - *Food & Beverage Sector and Overall CTA Star Winner*



Worthy winner: Karla Lacey and Rasheeda Burgess of the Bermuda Tourism Authority with Gary Pitt

Server scoops ambassador award

Owain Johnston-Barnes

A server at the Fairmont Southampton has been named the Tourism Ambassador of the Year by the Bermuda Tourism Authority.

Gary Pitt, 29, said: "My daily goal I set for myself is to make sure that our guests have a memorable experience while I serve them."

"I love giving them ideas on what to do while on the island, places to eat and history about the island."

Mr Pitt, a graduate of Florida's Full Sail University and a drummer in the Royal Bermuda Regiment Band & Corps of Drums, thought it was his love of showing visitors a truly Ber-

مودian experience that helped him win.

He said: "I'm outgoing, I like to meet people, so it was fitting that I came into this industry."

"I like sharing my experience. The joy is through meeting new people, sharing the love for my island and also working with great people who put their all into making the guest experience great."

Mr Pitt has also worked to pass his love of hospitality on to younger Bermudians.

He volunteered to teach students telephone and table etiquette, lectured at the Bermuda Hospitality Institute's Waiter-Server programme and has served as maître d' at annual charity event Plates of Passion for the past five years.

Mr Pitt was one of six certified tourism ambassadors honoured for their contributions to tourism.

Dwayne Caines took home the prize for accommodation; Phillip Anderson was honoured for travel services; Alec DeSilva won the award for transportation; John Dale won for recreation and entertainment; and Dee Simmons lifted the trophy for local ambassador.

Karla Lacey, BTA chief operating officer, said the CTA programme had helped spotlight the island's "hospitality front line" since it launched in 2014.

Ms Lacey added: "We've now reached the stage where individuals are able to receive international recognition for the work they do, which is a good

thing for the industry and for Bermuda."

Rasheeda Burgess, BTA tourism standards and training manager, said: "We are proud of our CTA stars who have been recognised by their peers for being great examples of those who exceed customer expectations, possess wide knowledge of Bermuda and support their fellow ambassadors and the local tourism industry."

"We are especially proud to recognise Gary Pitt, who not only demonstrates the above characteristics but continues to represent the ideals of Bermudian hospitality to our visitors every day."

Anyone interested in the Certified Tourism Ambassador programme should visit getbermuda.com/bta/tourism-ambassadors

CTA Appreciation Week

Every year the Standards & Training team arranges a week of activities that CTAs can participate in before the end of the summer. These activities are usually new or have been enhanced for the purpose of allowing our CTAs to have experiences they can actively promote to visitors. Activities that took place in September were:

- Frydays Trampoline Park, Dockyard
- Sip & Paint, Victoria Park
- URB-ebike, Clearwater & Coopers Island
- Rising Son Sunset Cruise & Made in Bermuda Nights, Great Sound and Whites Island
- Newstead Happy Hour, Newstead Belmont Hills Hotel

CTA Renewals

The renewal period for the CTA programme takes place from August to December. To encourage CTAs to renew their certification, the Standards & Training team implemented a number of initiatives, including a Phone Banking Event, where CTA volunteers personally called to remind, record points and take payments over the phone for early renewals. A second phone banking event took place in December.

At the close of the renewal period, 362 CTAs had renewed their certification, representing 43% of the 804 CTAs eligible to renew. While this was a small increase over the 42% renewal rate obtained during the same period last year, it exceeded expectations due to the high volume of CTA's comprised of America's Cup volunteers requiring renewal in 2018.



CTA Comparison Chart

YEAR	2015	2016	2017	2018
Newly Certified CTA'S	440	335	612	243
Total CTA's Eligible to Renew	2	439	585	849
Total CTA's with No Renewal	0	207	341	487
Percentage of CTA's Renewed	100%	53%	42%	43%
Total CTA's Renewed	2	232	244	362
Total CTA's -YE	440	567	856	617
Discrepancy	1	-18	7	0

Notes: Chart represents activity occurring in that year

2017 was a steep increase due to Americas Cup volunteers

Total CTA = total amount of CTA's at year-end, after the official renewal period has closed. If a same report was run though-out the year, the amount would be higher.

Discrepancies are due to CTA's choosing to renew outside the official timeframe (and occurring penalty fees), or unresolved duplicates in the database.

Mystery Shopper Programme

Driven by the increase in businesses in the NSSP programme, the application process to accept new mystery shoppers was completed in December. A CTA designation is a prerequisite to acceptance and 17 CTAs, from multiple age brackets and backgrounds, became new mystery shoppers. They joined a team of 11, resulting in 28 mystery shoppers supporting the programme heading into 2019.

#LovemyBermuda

For the third annual year, #LovemyBermuda was the featured sponsor during PHC's annual Good Friday Family Fun Day. This community event draws hundreds of locals who come for a day of entertainment, kite flying and good old-fashioned family fun. Each year, the BTA hosts a booth with a different theme: 2018 promoted the creation of the new National Tourism Plan through game-centric activities and branded prizes for winners of all ages. The event continues to provide an opportunity for grassroots community engagement with the BTA, its mission and team members.



#LovemyBermuda

Bermuda Visitor Services Centre Ltd. (BVSC)

The Bermuda Visitor Service Centres Ltd. (BVSC) was created in December 2017 as a wholly owned subsidiary of the Bermuda Tourism Authority. As the BTA continues to intensify its efforts to connect visitors with products and experiences that result in increased visitor satisfaction and spend throughout the sector, the goal is to establish these centres as the authoritative source for all tourism-related information on-island. To better reflect the substantive visitor support provided and quality of services on offer, the units were redefined as Visitor Service Centres (VSC).

As of January 1, 2018, BVSC held all related vendor and employment contracts, leases and service agreements that pertained to the establishment and management of BTA funded Visitor Service Centres (formerly Visitor Information Centres). A managing consultant was retained at the start of the year to build out the service model for the organisation. The model included: staffing, service delivery, visual merchandising, sales and reporting, and was completed by April.

BTA research indicates that visitors are looking for more personalised, unique and authentic experiences. Each VSC is to be equipped with the resources and tools (i.e. Wi-Fi, planning area, booking mechanisms, etc.) to help visitors fulfil their expectations. Most importantly, the team of BVSC employees undergo extensive and continuous training on the promotion and sale of experiences and merchandise. Each team member must be a Certified Tourism Ambassador (CTA), and is required to have in-depth knowledge of Bermuda's brand attributes.



Bermuda Visitor Services Centre VISION:

To become an internationally recognised industry leader for providing consistent and positive economic stimulation through the provision of high value visitor servicing.

On April 6, the Dockyard VSC opened in a smaller facility closer to the Ferry Dock with increased visibility.



In early May, a BVSC transport ticketing booth was erected on Compass Point, the mid-point between Heritage & King's Wharf, in Dockyard. The booth serves as the central location for cruise passengers to purchase public transport tokens and passes. This move allowed for the clear separation of transportation sales and consultative services within the VSC gazebo, enabling the team to focus on promoting Bermuda and selling experiences within the new building. Traffic continues to be driven to the gazebo to receive all literature, bus and ferry schedules, to book activities and experiences, and for general visitor information and services.

Also in May, a pop-up VSC opened in the Washington Mall in time for Labour Day weekend, replacing the information centre previously run by an independent contractor on behalf of the BTA in the Chamber of Commerce building near the Hamilton Ferry.

There are now **four ways** of promoting partner activities and experiences via the new VSCs:

1

www.GotoBermuda.com current website link

BTA's website is one of the main tools VSC ambassadors use to advise and inform visitors about the Island's offerings. If they are an NSSC provider, they have a priority listing, which the team is trained to promote first.

2

Dedicated digital advertising

All advertising is done via dedicated digital display screens. Advertising sales are handled exclusively via iHope Global, creating a revenue stream for BVSC.

3

BTA brand compliant experiential video

In each location, a large screen is dedicated to the promotion of Bermuda experiences and BTA-sponsored events. It is not used to promote any specific vendor, but features videos showcasing a variety of Bermuda activities, events and experiences. Partners may forward their video content to be reviewed for inclusion.

4

Booking via the kiosk portal (Activities, Events, Experiences)

In addition to the BTA website available at each location, the VSC's feature kiosks focusing on the sale of activities, events and experiences via fee-paying aggregator partners on a BTA webpage. Should someone have a ticketed event, they're encouraged to have it available via PTix and if it's a special experience, it can be offered via Winnow Life, while activities can be listed under Island Tours.

While originally intended for the second quarter of 2019, due to the untimely passing of Philip Anderson, the VIC contractor in St. George's, the BVSC was making arrangements to assume visitor service management for the town by year end. A new VSC is slated to open on the Hamilton waterfront by early 2019, along with a new fully branded location in St. George.

The new Visitor Services Centre going up along the Hamilton waterfront is part of a strategic approach to increase the amount of money travellers spend on-island by more seamlessly connecting them with tourism entrepreneurs. The two levels (plus roof deck) are made of approximately 30 shipping containers, formerly having been used as the Artemis Team Base at Cross Island during the 35th America's Cup. The new facility will have visitor services and

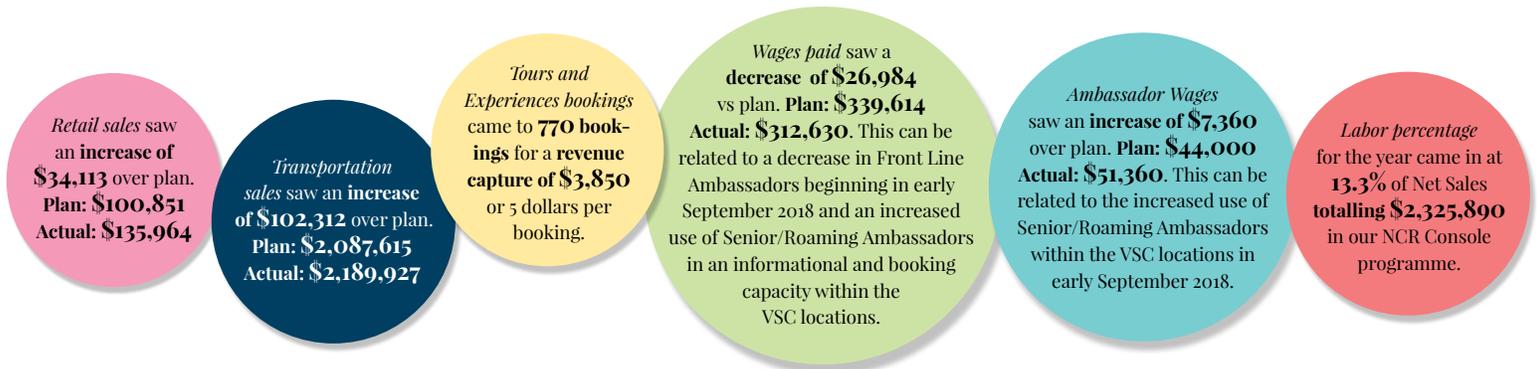


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Bermuda Visitor Services Centre MISSION:
To provide Bermuda's visitors with information that informs and educates; delivered through engaging individuals and services; that result in direct, measurable increases in spending on the Island's products and experiences.

branded merchandise on the first level, event space on the second level and the opportunity for pop-up vendors on the second level and rooftop. All levels of the space will provide lovely views of Hamilton Harbour.

By the end of 2018, based on our **Foot Fall Counter**, The VSC in Dockyard received:



The labour percentage does not include Senior/Roaming Ambassadors or Management Consultant contractual wages; Only Front Line Ambassadors and Night Auditors scheduled in or using the time clock Function in NCR Silver and/or NCR Console programme.

Stakeholder & Public Relations

The Stakeholder & Public Relations team were highly involved in representing the BTA with the National Tourism Plan, Beach Economy (and thereby Shelly Bay project), as well as Domestic Partnerships Act, both internally and externally. Details on those can be found in the Corporate Strategy section in the 2018 Year in Review. What follows here are the highlights of some of the Stakeholder & Public Relations the team dealt with during the year.

Missing Visitor

The disappearance of visiting college rugby player Mark Drombroski, 19, proved to be a major public relations crisis for Bermuda, given some inaccurate US network news reporting and social media posts. The story raised speculation that Drombroski had been murdered. Less than 48 hours later a forensic pathologist was able to rule that the death was unlikely to be the result of foul play and more likely the result of an accidental fall. Having stayed quiet on the speculation until a scientific finding was released, BTA worked quickly to share a statement of condolence to the Drombroski family and by doing so reinforcing to the world that the visitor's unfortunate death was accidental. It was important to protect Bermuda's reputation as a safe destination. The statement was out within minutes of the pathologist's announcement.

Georgetown University

The visit of Georgetown University's swim and dive team from January 2-9, proved to be an excellent communications opportunity. The total 70 coaches and athletes were here at the same time as the track and field team from the University of Western Ontario, so together they participated in a Bermuda Tourism Authority-hosted press conference.

However, more meaningful than the press conference locally was smartphone video from Daniel Johnson of the Georgetown team converging on a grocery store to buy supplies. This clip importantly helped to tell the story of the economic impact of sports teams in the shoulder season. The video was widely consumed on social media and received a lot of engagement.

Meantime, as soon as we learned a snowstorm was heading to DC while the GW team was in Bermuda, BTA marshalled a plan to capture local video and reached out to DC contacts: the BTA in-house camera was used to get the video and an interview with the head coach. The video proved to be compelling because while the team was training outdoors at the aquatic centre in Bermuda, back home the DC area was getting walloped by the snowstorm. The US FOX 5 channel showed clips of the video on several of its news shows.

"On behalf of Bermuda's tourism industry, and our entire island, we offer sincere condolences to the Dombroski family. We can't imagine their heartbreak following such an unexpected and tragic accident. We hope Mark's family, his teammates and all who love him can feel the warm embrace of our community during this difficult time."



Sports Tourism

The end of the fourth quarter always starts a strategically important season for sports. The Stakeholder & Public Relations team created a press event around the 600 visitors on-island for the World Ball Hockey Championships, so it was well covered. We also partnered with Bermemes to produce additional content for audiences difficult to reach.



Hurricane Messaging

The S&PR team worked with the marketing team to land the Boggias in Bermuda to celebrate their 50th wedding anniversary out here after their cruise was diverted to Bahamas. It was a good save because they wanted to have their wedding anniversary in the same place they celebrated their honeymoon in 1968. Plus, they had family flying out here to meet the cruise. With the help of Rosewood Bermuda and Fairmont Southampton, we were able to salvage everything. The couple and their family were super grateful and had a blast, while we have the great content to prove it. The content was turned around and used to score time on the TV news in New York and New Jersey. It proved an effective way to show consumers in our target market that Bermuda was unaffected by Hurricane Florence, even while cruise calls were being cancelled.



Fintech

The Minister responsible for IT Innovation, Wayne Caines, gave a presentation to the BTA team at a regularly scheduled staff meeting to talk about the Government's goals in the space and to discuss the role the tourism industry can and should play.





Board of Directors

2018 YEAR IN REVIEW



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