

BERMUDA
TOURISM AUTHORITY

Q2 2018 Report

*Research &
Business Intelligence*

During Q2 of 2018, the Research & Business (RBI) Intelligence Division accomplished the following:

1. An experienced Customer Relationship Management (CRM) Manager joined the team and has developed a 2018 implementation plan which includes:
 - a. The launch of the partner portal called “BTA Connect” which will allow BTA’s partners and stakeholders to manage their account information, listing descriptions on the website, update photos, add events to our events calendar, receive sales leads and post special offers. It also will provide partners with access to exclusive reports and post boards to interact with each other.
 - b. Forming an internal super user group to leverage division-specific CRM capabilities
 - c. Creating a training plan and extensive documentation for users
 - d. Optimizing CRM integrations with Outlook, the Event Impact Calculator (to estimate ROI on groups/events), email marketing campaigns, etc.
 - e. Implement best practices and standard operating procedures
2. Commissioned and managed an independent Impact Study of the World Triathlon Series Bermuda 2018. Results will be available in Q3 of 2018.

3. Developed and launched a customer feedback survey for patrons of the Visitor Service Centres to measure satisfaction and monitor the customer experience.
4. Continued analysis and development of visitor segments in the UK and Canada.
5. Worked with the National Tourism Plan Steering Committee, providing industry data and visitor and local resident research inputs.
6. Continued implementation of Power BI tool to automate data processes and enhance data visualization for reporting.
7. Continued development of an online visitor arrival form that will be made available pre-arrival in order to streamline the data collection during entry.

In addition, RBI continued the following:

1. Monitor and provide analysis on:

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.

2. Report monthly and quarterly on:

- a. Tourism Key Performance Indicators, including air, cruise, yacht arrivals, air service, visitor expenditure, visitor satisfaction, hotel performance, future projections, etc.

- b. Corporate objective status to staff and Board of Directors.

3. Meet quarterly with hotel partners (in conjunction with Sales & Marketing team) to review data, trends identify opportunities.

Product & Experiences

During Q2 of 2018, the Product & Experiences Division accomplished the following:

BTA Experience Investment

Roll out of BTA-supported experiences continued successfully through the second quarter 2018, covering arts/culture as well as sport:

- 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

These events generated a total of 2,485 visitors and 17,885 room nights for the quarter. In addition, another highly successful Bermuda Heroes Weekend event took place from June 15 – 18, 2018; pending data will be issued in the next reporting period.

Cultural & Leisure Highlights

Annual Peppercorn Ceremony Visitor Package Pilot – To celebrate the 202nd Annual Peppercorn Ceremony, the BTA piloted a 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 visitor packages being sold, providing a model for enhancing similar existing cultural experiences.

Bermuda Day Visitor Viewing – In conjunction with Community & Cultural Affairs, the BTA hosted a Bermuda Day Visitors viewing area to provide an enhanced viewing experience at this year's parade. Over 100 visitors stopped by to watch the colorful floats, dancers, music, Combeys 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) – Internationally-known for its water raft-up event, this year's BHW saw an increase in fetes and activities for carnival revellers travelling to the island. Final visitor numbers are pending; however, 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.

Wi-Fi Initiative – Wi-Fi has been installed at four hotspots around the island: Hamilton Ferry Terminal, Hamilton Bus Terminal, Dockyard Visitor Service Centre and Penno's Wharf. Two additional locations; Clearwater Beach and Shelly Bay are scheduled to come online in the next few months. This initiative is helping to address visitor expectations for key services, which include mobile access to real time information and local events/experiences. Additionally, we've been able to capture visitor details to market and engage with target audiences. In Q2, 26% of the 40,000 individuals who logged on to the Wi-Fi platform requested marketing information on Bermuda, on-island activities and special offers.

Sports Tourism Strategy

World Triathlon Series Bermuda – Bermuda successfully hosted the ITU World Triathlon Series (WTS) during the Bermuda Triathlon Festival Weekend, with an array of free public activities, from April 26th to 29th 2018.

The Elite and Age Group WTS Bermuda race event took place on Saturday 28th April, the second event in the 2018 WTS global circuit. Reigning ITU World Champion and Bermudian Flora Duffy successfully defended her title on home soil for the first time.

A total of 85 Elite Athletes participated, among 304 overseas athletes. 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.

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%. Visitors also enjoyed related activities around the racing, e.g. opening ceremony, kid's duathlon, diverse restaurants and unique island wide sights.

Other key data from the results of an event impact study conducted by PricewaterhouseCoopers Advisory Ltd. commissioned by the BTA:

- \$3.4 million investment in WTS Bermuda, \$2.9 million from the Bermuda Government
- \$4.4 million total economic impact, a 129% return on the investment
- Nearly 220 youth athletes participated in the kid's duathlon.
- 1.1 million people watched TV coverage of the WTS Bermuda elite races, broadcast in 21 different countries on 29 different channels
- \$17.8 million in Advertising Equivalent Value for Bermuda
- A total of 2,375 posts on social media, including Twitter, Instagram, YouTube and Facebook, which reached nearly 6.5 million fans across 53 different countries.

Sports Tourism Strategy (cont.)

The following sports events drove more first-time visitors and younger visitor demographics for the quarter:

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

Bermuda Volleyball Open - This group comprised a total of 50 athletes and support staff, from April 15-19. 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 volleyball.

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

Sailing

Our extended 2018 sailing season, which began in March and will run through to July, continued with the following regattas during the quarter:

Newport to Bermuda – In conjunction with the Royal Bermuda Club, this bi-annual event attracted over 160 visiting yachts from June 19-26. This level of participation resulted in over 1500 visitors from the event for Bermuda.

Annapolis to Bermuda Race – 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.

Antigua to Bermuda Race – RBYC also, in association with Antigua Sailing Week, coordinated the second annual Antigua Bermuda Race from May 9-17, 2018. The event generated 20 yachts and over 280 visitors, an impressive result for a second-time regatta. There was also extensive coverage throughout key sailing media.

Argo Gold Cup – The return of the Gold Cup after a three-year hiatus was a welcome addition to the 2018 sailing calendar. The regatta comprised 20 yachts and over 200 visitors from May 6 -13.

Sales & Marketing

Travel, Roomnights Group & PR Dashboard

KEY METRICS	YTD 2017	YTD 2018	PLAN GOAL 2018	% OF PLAN GOAL YTD	% Δ YOY (YTD)
Total Visitor Spending Influenced by BTA	\$46,043,433	\$45,070,253	\$87,200,000	52%	-2%
Total Room Nights Influenced by BTA	67,562	63,012	137,500	46%	-7%
Total Leisure Room Nights	52,099	46,397	95,900	48%	-11%
Total Group Room Nights	15,463	16,614	41,600	40%	7%
Sales & Marketing Group Room Nights	9,879	14,242	31,500	45%	44%
Product Group Room Nights	4,525	2,372	10,100	23%	-48%
S&M Group Sales Leads	200	275	610	45%	38%
S&M Group Sales Calls	250	170	527	32%	-32%
Number of Journalists Assisted	823	1,103	2,500		34%
*Earned Media Generated	\$12,306,292	\$3,286,317	\$17,662,754	19%	-73%
*Coverage in Top 100 Outlets	416	47			-89%
*Average Quality Coverage Score	73%	81%			10%
PR Impressions Generated	1,135,042,357	610,949,817			-46%

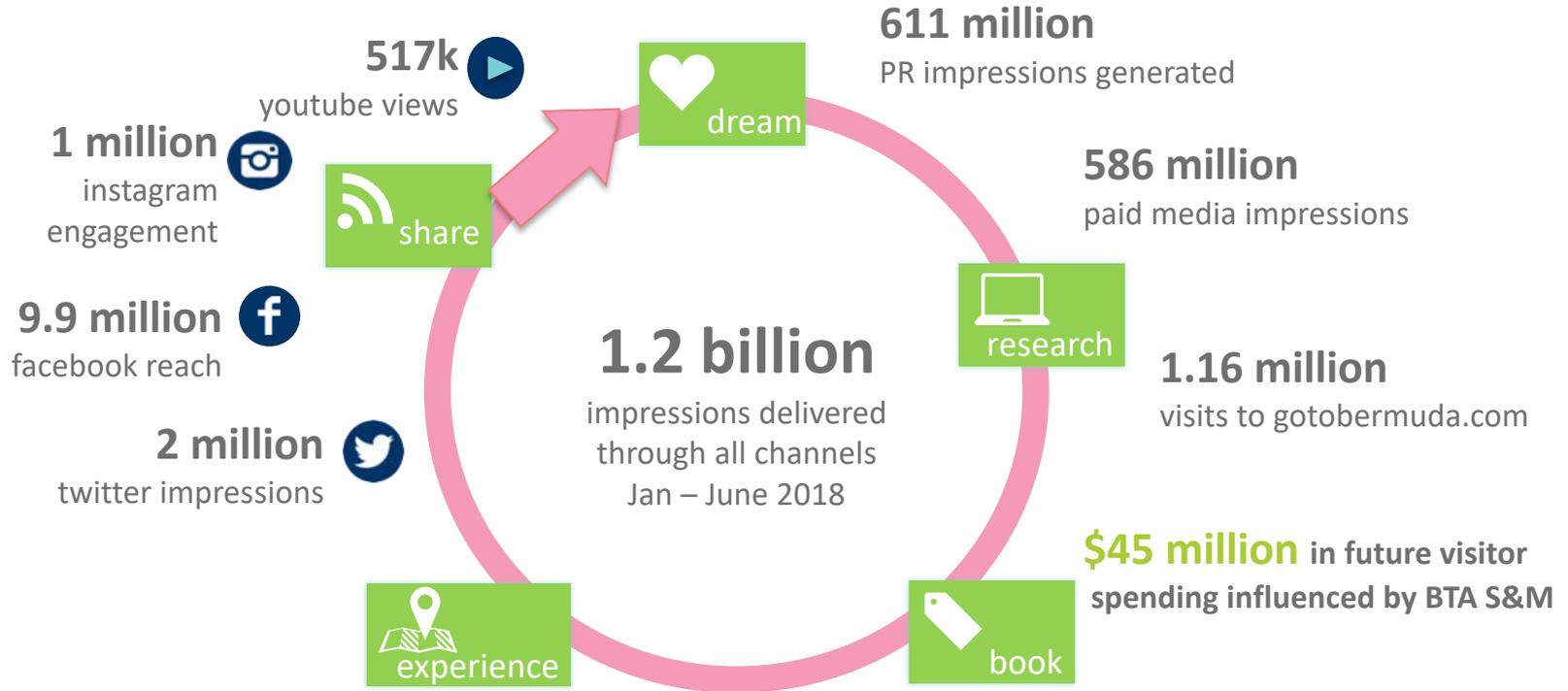
Digital Dashboard

KEY METRICS	YTD 2017	YTD 2018	GOAL 2018	% OF GOAL YTD	% Δ YOY (YTD)
Total Website Visits	1,248,601	1,169,012	2,448,790	48%	-6%
Website Page Views	3,322,804	2,937,904	5,655,727	52%	-12%
Time on Site	2:13	2:14	2:04	108%	0%
Newsletter Subscribers	290,710	259,164	250,982	108%	-11%
Newsletter Open Rate	12%	11%	12%	88%	-10%
Consumer Inquiries	373	279			-25%
Internet/Email	173	33			-81%
Phone	200	246			23%
Brochure Requests	16,290	11,481			-30%
Individual	4,467	7,809			75%
Bulk	11,823	3,672			-69%

Social Dashboard

KEY METRICS	YTD 2017	YTD 2018	GOAL 2018	% OF GOAL YTD	% Δ YOY (YTD)
Facebook Followers (month gained/YTD total)	337,792	351,122	372,062	94%	4%
Facebook Total Reach	5,951,556	9,904,184	21,590,762	46%	66%
Facebook Total Engagement	832,975	1,719,245	2,414,450	71%	106%
Facebook Engagement (likes/comments/shares)	216,889	1,719,245			693%
Facebook Engagements (clicks/video views)	616,086	0			
Twitter Followers (month gained/YTD total)	24,250	26,805	28,857	93%	11%
Twitter Impressions	1,536,272	2,060,623	4,132,521	50%	34%
Twitter Engagement	36,191	83,699	160,635	52%	131%
Instagram Followers (month gained/YTD total)	38,317	50,500	54,809	92%	32%
Instagram Engagement	250,594	1,032,513	933,147	111%	312%
YouTube Subscribers (month gained/YTD total)	1,743	2,089	2,330	90%	20%
YouTube Total Views	202,782	516,675	3,734,899	14%	155%
YouTube Minutes Watched	239,740	689,462	2,572,159	27%	188%
Pinterest Followers (month gained/YTD total)	2,406	2,512	2,635	95%	4%
Pinterest Repins	1,234	532	1,959	27%	-57%

2018 YTD Marketing Snapshot



Sales & Event Engagement

Sales

Event	Location	Start	End
ALHI DC Event, Trade Show & Reception	Washington, DC	04/16/18	04/17/18
Incentive Travel Exchange	Las Vegas	04/18/18	04/21/18
All Sport International Site Visit	Bermuda	04/19/18	04/22/18
NASC Symposium	Minneapolis, MN	04/23/18	04/26/18
Soccer Tours - Site Visit	Bermuda	05/11/18	05/13/18
Hendrick's Gin US Launch Site Visit	Bermuda	05/28/18	07/01/18
FDCC Site Visit	Bermuda	05/29/18	05/30/18
PEW Trusts Site Visit	Bermuda	05/31/18	06/01/18
CSCAA Site Visit - Swimming	Bermuda	06/29/18	07/02/18

Sales Engagement Highlights – Destination Training

Destination Webinar - April 20 Trained 5 agents

ITC Group Webinar - April 24 Trained 7 agents

Apple Vacations Destination Training - May 16 Trained 75 agents

Apple Vacations Webinar Training - May 16 Trained 63 agents

Sales Engagement Highlights – Travel Trade Show

Virtuoso Travel Week Tour

Los Angeles, CA

April 5 - 6

Participated in 86 one-on-one 2 days with 150 agents

Virtuoso Travel Week Tour

San Antonio, TX

April 12 - 13

Participated in 86 one-on-one 2 days with 100 agents

GOGO Vacations Road Show, Boston, MA

April 19

Participated in 15 one-on-one 1 day with 80 agents

GOGO Vacations Road Show, Chicago, IL

May 15

Participated in 16 one-on-one 1 day with 77 agents



Sales Engagement Highlights – Travel Trade Show

Virtuoso Travel Week Tour – Ritz Carlton Orlando

Orlando, FL

May 11 - 12

Participated in 64 one-on-one appointments with 83 agents

Sales Calls: Chicago, IL

May 17

Four agency calls connecting with 10 agents

Luxury Travel Advisor's ULTRA Summit

Manalapan Beach, FL

May 30 – June 1

Participated in 26 one-on-one appointments with 67 agents

Departures Luxury Travel Forum

Las Vegas, NV

June 6 – 8

Conducted 35 minute presentations with 34 agents



Sales Engagement Events – Meetings Market

ALHI DC Luxury Showcase & Tradeshow

Washington DC

April 17

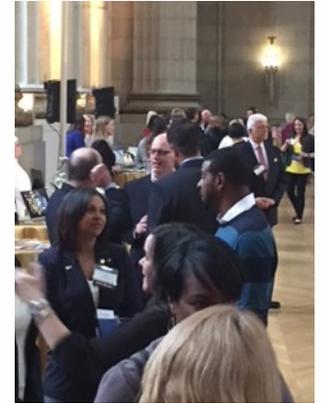
Participated in annual event with 212 attendees

Incentive Travel Exchange

Las Vegas NV

April 18 – 20

Participated in 30 one-on-one appointments with
75 attendees



Sales Engagement Events – Site Visits

Virtuoso & Canadian Fam Trip

April 30 – May 4/ April 29 – May 3

Air Canada & BTA Canadian rep Varuni Sakhalkar

6 Canadian agents & 5 Virtuoso agents

FDCC – The Federation of Defense & Corporate Counsel

May 29 - June 1

Pew Program in the Biomedical Sciences

May 31 – June 1

CSCAA (College of Swimming/Diving Coaches Association
of America)

June 29 – July 2



Paid Media & Partner Marketing

Overview

- Integrated media programs generated over 263.5MM gross impressions
- Garnered a total of 536,581 digital media web visits and 8,102,817 non-web engagements for the quarter
- Impressions: 53% to goal at the end of Q2
- Media Investment: 55% to goal at the end of Q2
- Engagements: 61% to goal at the end of Q2
 - Metrics pacing slightly ahead across the board - should be at 50% by the end of Q2
- Cost-per-Engagement averages \$0.12 for the quarter, which is well below our goal of \$2.00
- 3,760 arrivals reported by Arrivalist in Q2; 104.8MM exposures; \$271 Cost-Per-Arrival (goal of \$200 or less)

BRAND RESULTS

High level overview of performance for all media placements assigned to Brand creative

- 117.5MM Impressions
- 7,647,697 Engagements
- \$0.10 Cost-Per-Engagement
- 21,785 Signals of Intent; Click-to-Book
- 1,439 Leads; Request for More Info
- Top performers for driving web traffic were Trip Advisor, Digilant, Sojern, and Facebook/Instagram
- Trip Advisor Sponsored Content Page Views are approx. 34% higher than at the end of Q2 2017

Broadcast

NEW YORK

- Flight Dates: April 23 – May 27
- Spots: 84
- Impressions: 25,000,000
- Total GRPs: 102

WASHINGTON DC

- Flight Dates: May 14 – June 10
- Spots: 98
- Impressions: 2,500,000
- Total GRPs: 122

Town & Country SPRING GATHERING

Landmarc Tribeca – NYC - April 14

Attendees:

An intimate group of approx. 40 T&C +
Bermuda Tourism VIP Tastemakers and
Travel Enthusiasts

Memorable Moments:

Rum Swizzles, floral moongate, BTA Vespa,
cotton candy, luncheon



AFAR – Evenings Afar

Grand Banks NYC - June 4

Attendees: 115

Event Features

- AFAR Custom Illustrations by Meagan Morrison of @TravelWriteDraw
- Personal floral arrangements by Florabrook
- Gosling's Rum Station + Custom Cocktails
- Jetblue Giveaway – Two Round-Trip Tickets to Bermuda



Summer Fridays Overview

CAMPAIGN DETAILS

Flight Dates: May 15 – August 24

116.3 million impressions

115,939 Engagements

GEO-TARGETING

New York Tri State, Boston, DC Metro, Chicago, Philadelphia, Toronto

CHANNELS

Digital included standard banners, native, GeoFenced events, private market place

Print ad in the New Yorker

OOH included taxi tops in NYC & Boston, and digital board :15s spots in Brookfield Place

Pinknic event sponsorship



BERMUDA

OTA Program Highlights

ACTIVITY

- OTA Performance Metrics:
 - 6.5MM Impressions generated to-date across Expedia Inc (encompasses Travelocity, Hotels.com, Orbitz), driving both on and offsite traffic
 - 4.8MM Impressions generated to-date from TripAdvisor media
- TripAdvisor continues to generate an exceptionally larger amount of Arrivals reported by Arrivals, which is to be expected due to the amount of Expedia media that keeps users on the Expedia site, rather than clicking off to Bermuda's site
 - TripAdvisor: 5,998 Arrivals from 2018 + 2017 media combined (from pixel launch to-date)
 - Expedia: 1,396 Arrivals from 2018 + 2017 media combined (from pixel launch to-date)
- TripAdvisor Sponsorship Page generated over 457K page views from April - June
 - Approx. 34% increase from this same time period in 2017
- Expedia reports a gross increase of 2% in hotel bookings YoY (reporting period is April - June)

Web Metrics

Total Site Traffic & Goals

- 16% fewer YOY site sessions
 - 110,514 fewer visits – 571,720
 - 340,276 fewer page views (-19%) – 1,415,011 page views
- 30% of all sessions completed a conversion goal
- Conversion Goal Completion
 - Time on Site Over 3:00 – 88,208 – **28% decrease vs Q2 2017**
 - Hotel Inquiry – 12,862 – **19% increase vs Q2 2017**
 - Booking Widget Clicks (New in 2017) – 8,147
 - Brochure Downloads – 15,257 – **1.9% decrease vs Q2 2017**
 - Brochure Orders – 2,114 – **9% decrease vs Q2 2017**
 - eNews Registration – 1,667 – **11% increase vs Q2 2017**

Total Site Traffic & Goals

- Total Partner Referrals – 60,237
 - Profile referrals – 57,282
 - Deal referrals – 1,302
 - Event referrals – 1,642
- Total Partner Pageviews – 187,944
 - Profiles – 169,343
 - Deals – 9,547
 - Events – 9,049
- 32% Click through rate to Partners

SEM Performance

Month	Clicks	Impressions	CTR	Avg. CPC	Cost	Avg. position	Conversions
May 2018	42,145	1,036,134	4.07%	\$ 0.87	36,767.93	1.8	18,655
June 2018	44,483	1,104,774	4.03%	\$ 0.84	37,335.40	2	18,289
April 2018	36,672	896,633	4.09%	\$ 1.00	36,549.06	1.8	15,205
Total	123,300	3,037,541	4.06%	\$ 0.90	110,652.39	1.9	52,149

- In Q2'18, SEM campaigns saw a decrease on cost per conversions dropping from \$2.59 to \$2.12, allowing us to see 14k+ more conversions than the same period last year.
- Our CTR saw a respectable increase from 3.91% to 4.06%
- Total spend for the quarter was \$110,652.39, with 52,149 total conversions.

Campaigns

- Seasonal Campaigns live:
 - Bermuda Railway
 - Bermuda Cup Match



Top Ads & Videos

Places To Stay In Bermuda
Escape to Bermuda

www.gotobermuda.com/Places-To-Stay

Search the Island's Hotel Deals. Book Your Vacation Today and Save!

Tour Beautiful Bermuda
Official Travel Site

gotobermuda.com/Things-To-Do/Tours

Entertainment, Sightseeing & More. Visit The Official Bermuda Site!

Things to Do in Bermuda

Plan Your Island Vacation

www.gotobermuda.com/things-to-do

Official Site: View Our List of 21 Free and Affordable Things to Do!

Beautiful Bermuda Island

Plan Your Island Vacation

gotobermuda.com/Island/Experiences

Soak Up Island Life. Visit Official Site For Deals & Specials!

YouTube preview for St George's, Bermuda



YouTube preview for Cup Match



BERMUDA

eNewsletter Overview

Overview & Highlights

APRIL NEWSLETTER

Save Money, Spend Time
Now is the time to save on your spring getaway to Bermuda. Don't miss these exclusive hotel offers, packages and deals.

UPCOMING EVENTS

BERMUDA Day
Kick off summer in Bermuda style. On May 21, Bermuda is the capital to celebrate Bermuda's heritage for the weekend. Enjoy live music, art, food and more. Don't miss the "Bermuda Day" ceremony in honor of the island of the City of Heroes.

CONNECT WITH US

1 2 3 4 5 6

Management | Contact Us | Unsubscribe

Open Rate: 12%
Click-to-open Rate: 23%
Top Clicked Link: Deals

MAY NEWSLETTER

WHAT'S YOUR SUMMER FRIDAY STYLE
Make the most of your Summer Fridays by getting out here. Whether you consider yourself active and adventurous, relaxed and laid-back or casual and elegant in Bermuda you're sure to find something that inspires your style.

UPCOMING events

WARDOUR NIGHTS
Enjoy a summer night in Bermuda in style. Celebrate the island's rich history, but don't forget to have fun. Enjoy live music, dancing and more.

BERMUDA HEROES WEEKEND
Be inspired by the island's rich history. Celebrate the island's heritage with the Bermuda Heroes Weekend. Enjoy live music, dancing and more.

BEHIND THE BAR
Celebrate the spirit of summer with a drink. Enjoy live music, dancing and more.

1 2 3 4 5 6

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Open Rate: 9%
Click-to-open Rate: 24%
Top Clicked Link: Summer Fridays

JUNE NEWSLETTER

BERMUDA WATER SPORTS
From exciting water sports to relaxing, we have something for everyone.

UPCOMING EVENTS

Ascending to the Peak
Join us for an unforgettable experience in Bermuda. Ascending to the Peak offers a unique view of the island and its natural beauty.

CONNECT WITH US

1 2 3 4 5 6

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Open Rate: 12%
Click-to-open Rate: 24%
Top Clicked Link: Bermuda beach names

Canadian Overview & Highlights

APRIL NEWSLETTER



BERMUDA'S Regions

Bermuda is 2-square miles of natural beauty and colorful island culture. To get a lay of the land, explore the island's three regions – **West End**, **Central Bermuda** and **East End** – and get an overview of the world-renowned beaches dotting its shores.

ST. GEORGES @ the East End – Step back in time as you stroll the centuries-old brick streets of the Town of St. George, Bermuda's former capital and a UNESCO World heritage site. The well-preserved historic town and nearby farms make this region a haven for British colonial architecture, history and culture.

HAMILTON @ Central Bermuda – Central Bermuda is home to the capital City of Hamilton, a harbour town known for its blend of global appreciation, vibrant nightlife and local flavor. Enjoy dining, shopping, dance clubs and the island's most cosmopolitan culture along Front Street downtown, and find great beaches, botanical gardens, jubb jabs and ocean-front golf courses.

ROYAL NAVAL DOCKYARD @ the West End – One of Bermuda's most popular destinations, the historic Royal Naval Dockyard anchors the West End. The Dockyard is home to a major cruise ship port and serves as a hub for sightseeing, shopping, dining, entertainment and an array of island experiences. Climb up Gibbs Hill Lighthouse for panoramic views of the South Shore, and explore the edge of Somerset, home to palm trees, candy-colored cottages and the most photogenic little drawbridge you'll ever see.

TRAVEL TRAVEL CONTACT (Bermuda Planning, Events, Training Resources)
Vernel Bahkhal | vernel@travelcontact.com | 416 561 5566 | www.guidebermuda.com

Open Rate: 18%

MAY NEWSLETTER



Bermuda Summer Adventures

Pink sand beaches, overcasted golf or row activities. Just a 3-hour flight from Toronto!

You'll get plenty of sun and sand during the summer in Bermuda. But out here, the season is a little bit different. For one thing, there isn't a perfect blue sea every closer and you'll find a summer island atmosphere in one way or another. So, do enjoy the fun days with locals, catch a thrilling cricket match or savor local, or enjoy Front Street's thriving dining and nightlife scene.

Beer to Endevour's Mission
Dive down to learn why Bermuda has earned a reputation as the shipwreck capital of the Atlantic Ocean, with more than 300 wrecks strewn along an 800-foot, 100-mile treasure-bedecked Bermuda is also home to some of the world's finest snorkeling.

Land the Big One
Bermuda is deep sea angler's dream come true. May and June are the best time to fish for the yellowtail tuna and snappers, while you'll most likely to catch blue marlin in July and August when the water heats up to 25°C (77°F).

So, tell the Village: Beer Cruise
Head to Bermuda's scenic beauty, anchored out on the Great Sound of Bermuda Island. At the end of the island, in the Queen's Parks, there's a weekly beer cruise with signature cocktails, a DJ spinning making beats, a friendly vibe and one of the most spectacular sunsets you'll ever witness.

Experience a Live West End Light Show
Summer is a great time for fireworks. But how about experiencing some cultural fireworks? Close your eyes during the summer months and listen to the live performance of the island's best live music in a unique setting. From a glass-bottom boat, you'll see a stream-like bright green glow in the water. It's an only-in-Bermuda summer light show.

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Open Rate: 17%
Click-to-open Rate: 0.3%

JUNE NEWSLETTER



Summer Fridays with a Splash!

Disappear to discover our island beauty, mystery & adventures. Experience 3 hours from Toronto & 2 hours from most East Coast cities.

Set your out-of-office, then set your sights on Bermuda. Out here, you'll be sipping Rum Swirls and getting lost in island adventures, not getting stuck in traffic. The ultimate Summer Friday awaits.

Why @ Bermuda?

- Not the usual island get-away on the ocean or on a beach, but try to explore centuries-old landmarks.
- Take a day to lose the island and bond on the scenic overwater Bahaia Club.
- Sample island flavors and enjoy colorful adventures along the way with the Old Blue Team.

Unleash @ Island

- Bermuda's happy hours are the perfect way to unwind from work.
- Bermuda's happy hours are the perfect way to unwind from work. Relax to Bermuda's happy hours, sip a refreshing Rum Swirl or take in some island views up the island cliffs.
- Head to Bermuda's Beach for something else, enjoy waters and meeting and mingling with islanders.
- Experience the island's unique culture and its fun and free things to do.
- Take a variety of exciting Bermuda experiences, from Bermuda's Club to the Bermuda Rum Club Company.

People @ Island

- If you're looking for some quality beach time, indulge in a spa treatment.
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Open Rate: 17%
Click-to-open Rate: 0.2%

Promotions & PR

North American Coverage Highlights

YTD COVERAGE SNAPSHOT

- Number of Articles: 111
- Impressions: 607,221,321
- Media Value: \$3,062,607.36
- Average Score: 82
- Submitted Q1 and Q2 What's New via PR Newswire



Travel + Leisure – April 1 Destination Cover Story

BERMUDA

North American Coverage Highlights



Start Planning Your Vacation Now
— These Are the
Most Beautiful Islands in the World

8) Bermuda

One of the world's most beautiful islands is also one of the closest (for East Coasters, that is). Bermuda, famed for its pink-sand beaches like [Horseshoe Bay](#), is just 650 miles off the coast of North Carolina, so you can be sipping Dark and Stormys in no time.

*MSN – June 21
Beautiful Island Round Up*



brilliant BERMUDA
FROM LUXURIOUS RESORTS TO BEACHES AND BAYBOATS, THIS ISLAND HAS EVERYTHING YOU NEED FOR THE PERFECT VACATION. BY KATHY HARRIS

There's something magical about Bermuda. The island is a mix of natural beauty and man-made luxury. From the pink sand beaches to the historic architecture, there's something for everyone. The island is also a great place to enjoy a Dark and Stormy.

Best spots
Horseshoe Bay Beach is one of the most beautiful beaches in the world. It's a long, narrow beach with pink sand and clear blue water. The beach is also a great place to enjoy a Dark and Stormy.

Best spots
The Bermuda National Trust is a great place to see the island's history. It has a museum and a garden. The garden is a mix of Bermuda and European plants. It's a great place to see the island's history.

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*Woodbury Magazine – May 1
Destination Feature*

North American Press Trips

Conservation and Culture

- Erin Lindholm, Freelance
- Jennifer Logue, Philly Metro
- Victoria Desilverio, Freelance

Bermuda Summer Fridays After Dark

- AJ Gibbson, GQ
- Noel Walker, Freelance
- Teryn Payne, Teen Vogue
- Gina Pace, Freelance
- Steve Grasso, Recommend/Prevue

Individual

- David Duran, Freelance
- Nick DeRenzo, Hemispheres
- Kristin Brasswell, Vogue
- Lanee Lee, Forbes
- Jason Frye, Cruise Critic

North American Press Trips

COVERAGE GENERATED FROM PRESS TRIPS

CNN travel

10 Hotels With Museum-Worthy Art Collections



Fairmont Hamilton Princess & Beach Club, Bermuda

The Fairmont Hamilton Princess & Beach Club displays more than 60 museum-worthy pieces throughout the property, making you think you stumbled into a gallery. The hotel introduced the public art program as part of a multimillion-dollar renovation in 2016 and runs guided tours every Saturday at 10 a.m. and by appointment. You don't need a tour to view the collection, however. Banksy ("Girl with Balloon"), Andy Warhol ("Queen Elizabeth II, Reigning Queens"), Jeff Koons ("Monkey Blue") and Damien Hirst ("Cineole"), decorate the lobby, while Ai Weiwei's "Divina Proportione" sculpture is just outside the lobby. There's also a Yayoi Kusama pumpkin sculpture in the courtyard, and Tom Sachs' famous "Miffy" piece outside of Marcus' restaurant. Around every turn you'll also find works by KAWS (pictured), Roy Lichtenstein, Takashi Murakami, Jasper Johns, Mr. Brainwash, Nelson Mandela and many others.

*CNN Online - April 15
Caribbean Hotels*

CNN TRIATHLON



Flora Duffy reveals her training secrets

*220 Triathlon - April 26
Triathlon Training*

Boston



Boston Traveler: Bermuda

*Boston Magazine - May 8
Destination Feature*

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North American Press Trips

COVERAGE GENERATED FROM PRESS TRIPS

BBC
TRAVEL



The drawbridge you can cross
in two seconds

With an opening just 56cm wide, the world's smallest drawbridge is large enough to accommodate the mast of a sailboat. Yet the bridge, which links the southern tip of Somerset Island to Sandys Parish on the south-western shore of the main island, once saved Bermuda's residents up to three hours in travel time.

*BBC Travel – April 27
Attraction Feature*

CRUISE
& TRAVEL LIFESTYLES



Bermuda...
a Watery Xanadu

First up on the list for my long weekend getaway to Bermuda was a two-tank dive with Dive Bermuda, located at the Fairmont Southampton hotel. In my limited experience, a dive instructor should have a disposition similar to a good doctor or favorite teacher; calm, cool and self-assured. Thank goodness, our dive instructor, Chris Haile, had just that. After giving our group of eight a pre-dive briefing and getting us outfitted, Chris took us to the first dive site. By the time I got in the water, I was totally at ease.

*Cruise & Travel Lifestyles – May 15
Destination Feature*

Men's Health



*Men's Health – June 1
Romantic Getaway*

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North American Press Trips

COVERAGE GENERATED FROM PRESS TRIPS

Forbes ★★
TRAVEL GUIDE



Atop a hill in Bermuda's Tucker's Point – the island's most desirable neighborhood where Michael Bloomberg, Ross Perot and many other well-heeled individuals own vacation homes – Forbes Travel Guide Four-Star **Rosewood Bermuda** recently revealed a stunning makeover to the tune of \$25 million. The hotel's refresh focused on transforming the guest rooms, spa and beach club, while also debuting some new additions, including the Conservatory Bar and Lounge, a gin-themed craft cocktail bar.

*Forbes Travel Guide – June 19
Hotel Feature*



A Bermuda triangle:
Where to eat, stay and play

*CNN Travel – June 7
Destination Feature*

VOGUE

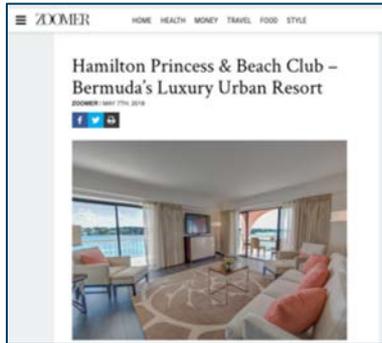


The Caribbean Carnivals You Don't
Want to Miss This Summer

*Vogue – June 24
Carnival Feature*

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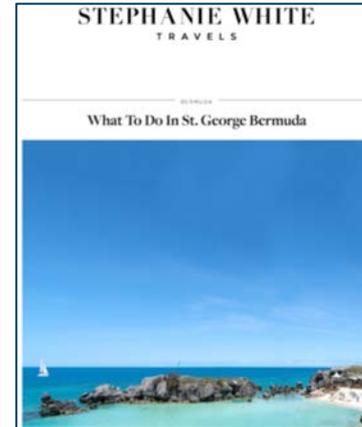
Canadian Media Coverage Highlights



EverythingZoomer.com - May 7



Travel Courier - May 14



StephanieWhiteTravels.com May 2018

Canadian Media Coverage Highlights



Daily Hive – June 6

DESTINATIONS

The **Bermuda** tourism industry is off to a strong start in 2018 with leisure air arrivals and leisure air visitor spending both up sharply in the first quarter, besting last year's first quarter numbers, which turned out to be part of a record-breaking 2017. Leisure air arrivals were up 21% in Q1 2018, while leisure air visitor spending grew 25%. The first three months of 2018 marked the ninth consecutive quarter that



Bermuda's tourism industry has grown in vacation air arrivals and spending. "After a decades-long malaise, this is very encouraging news for our tourism industry's workers, business owners and investors," said **Bermuda** Tourism Authority CEO Kevin Dallas.

Travelweek – June 17



MSN Canada – June 24

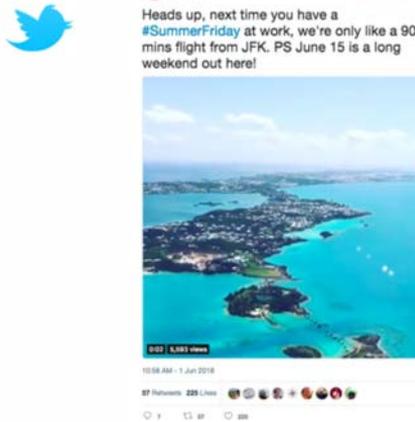
Social

BERMUDAΔ

Top-Performing Posts



Reached Users: 85,200
Reactions: 7,072
Post Clicks: 1,800



Impressions: 24,645
Engagements: 407
Retweets: 57
Likes: 225



Reach: 25,084
Likes: 3,600
Comments: 162

This quarter, the best performing content tended toward aerial images and video. We also saw UGC submissions start to increase again as the summer season began. Bermuda Summer Fridays has guided much of the content created, whether the term “summer Friday” is overtly used or not. This lets certain posts to speak to the Summer Friday key markets, while also enabling it to be used for inspiration for markets that are a little further out of the 90-minute flight zone. UGC photos this summer have a slightly different vibe than past summers, which we are monitoring along with how the rise of temporary stories on the channel will impact the amount of UGC that we curate throughout the season. The next few months of content will continue to speak to Summer Fridays and travel planning education, but will also tie in elements of Uncover Bermuda.

Investment

During Q2 of 2018, the Investment Division focused on the following:

The investment division continued its mandate of developing an investment environment for domestic and international investors and operators in Bermuda. primarily focused on completing and finalizing key legislative framework for submission to the Ministry of Tourism Development and Transport for review and adoption. The outreach to both local and international investors and operators remain a core activity and focus.

Activities and accomplishments during the quarter included:

- Attendance at investment and development conferences to meet with investors and financiers.
- Promotion of the Tourism Investment Act 2017 to stakeholders, both local and international.
- On island meetings with hotel general managers to understand key challenges and opportunities.
- Provide concierge service and advice to existing properties under development and under consideration.

Operations

During Q2 of 2018, the Operations Division focused on the following:

During Q2, the Operations Division successfully concluded a 4th consecutive non-qualified audit by the Auditor General; opened a new Visitor Service Centre in Dockyard and a pop-up in Hamilton; and completed the transition to an internally managed IT environment.

Operations, General

The Bermuda Visitor Service Centres Ltd. (VSC) retained a manager to build-out the service model for the organization. The model includes: staffing, service delivery, visual merchandising, sales, and reporting and was completed prior to quarter end. The service model has been introduced in the Dockyard yard location, and will be extended to service delivery in Hamilton, starting in May. Also in Dockyard, the move to a new location closer to the Ferry Dock in Dockyard was nearly complete at end of Q1, and an 'official' opening date was set for April 6th.

Human Resources - As at June 30, 2018 BTA had 40 employees in the Bermuda and New York offices. This includes full time permanent, and two interns.

Investments	2
Operations/CEO	13
Product and Experience	6
Research and Business Intelligence	3
Sales and Marketing	16

Recruitment - The majority of positions being recruited at the end of Q1 were filled. At end of Q2, only two of the seven remained open, with one additional post being actively recruited due to a staff exit.

Director of Sales	- Sales & Marketing
Brand Events Manager	- Sales & Marketing
Market Specialist	- Sales & Marketing

IT- With a mandate for all IT functions to be cloud-based and accessible to the BTA team from any location and device, BTA completed the transition to an internally managed IT environment at the end of Q2.

The move to a fully cloud based environment is expected by end of Q3/early Q4.

Uncover Bermuda Summer Edition highlight - In continuing to recognise businesses who have gained certification, relevant NSSP certified businesses were added into the Uncover Bermuda Brochure with the NSSC seal of approval against their business listing. A notation at the beginning of the brochure informs visitors that the seal demonstrates a company's commitment to service excellence.



Current NSSP certified Businesses are:

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. Georges)
 Tobacco Bay
 Tuck INN Rentals

There were a total of **41** businesses in the process of receiving certification or recertification at the end of Q2.

Certified Tourism Ambassador Programme

During Q2, Standards and Training sub-division focused on several projects related to our Certified Tourism Ambassadors.

Hospitality Appreciation Event - In partnership with the Bermuda Hospitality Institute, the BTA held a networking and appreciation event for CTAs at the end of April to close out Hospitality Month. Fun Golf Bermuda, an NSSC businesses 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. This opportunity was used to recognize CTA Stars publicly as they received a glass star trophy for their dedication to service on the front line.

CTA Star Awards - In partnership

The BTA recognised the following persons as the 2018 CTA stars:

- 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

These persons were nominated by their peers in the industry for demonstrating their commitment to Bermuda on the front line. An RG article featuring their profiles and accomplishments is due to be released in Q3.



Bermuda Visitor Services Centre Ltd. (BVSC)

BVSC was created in December 2017 as a wholly owned subsidiary of the Bermuda Tourism Authority.

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

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.

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 1 January 2018, BVSC held all related vendor and employment contracts, leases and service agreements that pertained to the establishment and management of BTA funded Island's Visitors Service Centres (formerly Visitor Information Centres).

BTA research indicates that visitors are looking for more personalized, unique and authentic experiences. Each VSC will be equipped with the resources and tools (i.e. Wifi, planning area, booking mechanisms, etc.) to help visitors fulfill their expectations. Most importantly, the team of BVSC employees undergo extensive and continuous training on the promotion and sales 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.

On 6 April, the Dockyard VSC opened in a smaller facility closer to the Ferry Dock with increased visibility; a new VSC is slated to open on the Hamilton waterfront before year-end; and the St. George's VSC will revert to BVSC management in 2019.



In early May a BVSC transport ticketing booth was erected on Compass Point, the mid-point between Heritage & King's Wharf. (A tent is up temporarily, until a purpose-built container arrives.) The booth serves as the central location for cruise passengers to purchase public transport tokens and passes.

This move allows 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 Chamber of Commerce building near the Hamilton Ferry.



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So, what does this mean for industry partners?

There are 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 being trained to promote first.

2. Dedicated digital advertising

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

3. BTA brand compliant experiential video

In each location, a large screen is/will be 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. Note: this does not include videos solely dedicated to the sale of a particular place, person or thing.

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 (natalie@premier.bm); if it's a special experience, it can be offered via Winnow Life (alison@winnow.life); and an activity can be listed under Island Tours (admin@islandtourcentre.com).

*Strategy & Corporate
Communications*

During Q2 of 2018, the Strategy & Corporate Communication accomplished the following:

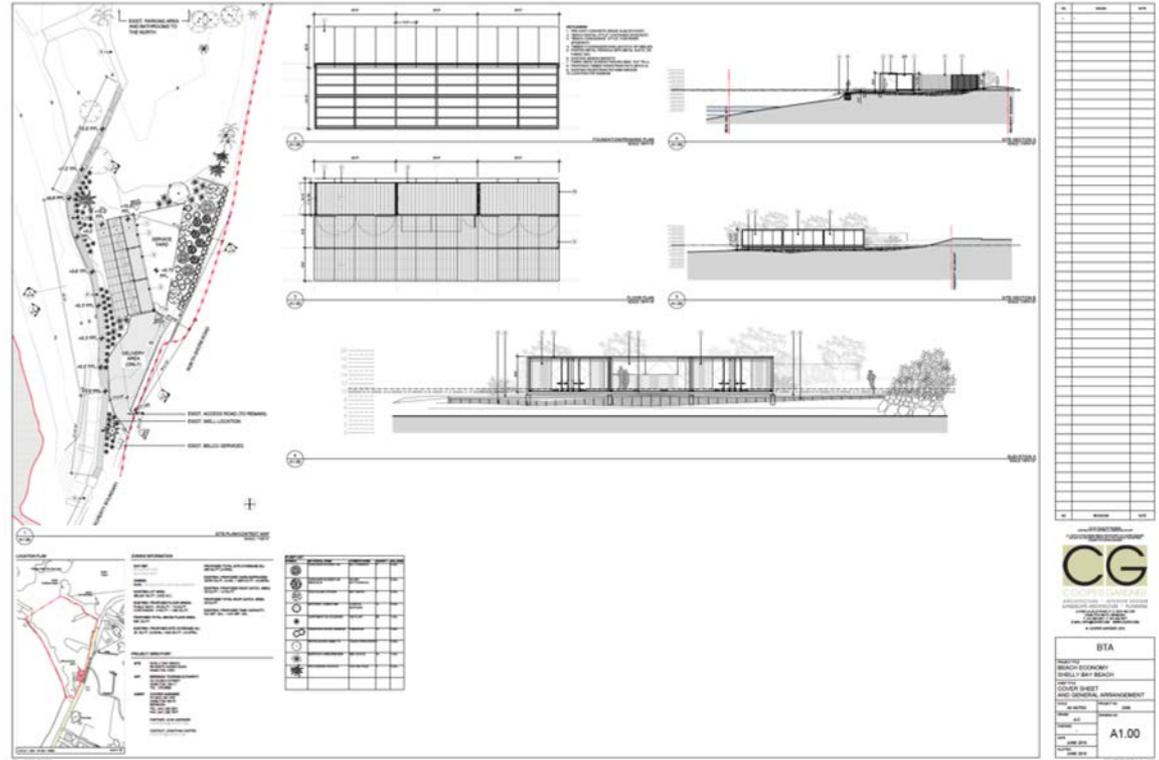
National Tourism Plan

- The working group sessions for the National Tourism Plan were began in the second quarter with RedSky Strategy, about 40 people are participating.
- Key milestone dates ahead
 - Mid-August – Draft Report Due
 - August 21 – Daylong Session with Staff
 - August 23 – Meet with BTA Agency Partners
 - September – Discuss draft report with key figures
 - BTA Board
 - Bermuda First
 - Cabinet EDC
 - October 24 – Present report at BTA Summit



Beach Economy Vision at Shelly Bay

- Signed MOU with Ministry of Public Works granting the BTA authority to manage a concession area at a specified location at Shelly Bay Park
- Met with residents of Hamilton Parish about the proposed Shelly Bay plan in town hall forum hosted by the area Members of Parliament
- Met with entrepreneurs interested at the beach economy to share proposed plan at Shelly Bay with market research
- Submitted planning application for container placement at Shelly Bay Park in the area designated in the MOU
- Published an Expression of Interest followed by a formal RFP to recruit entrepreneurs interested in operating a Shelly Bay concession



Financials

The Financial Statements for the year ended December 31, 2017 have been approved by the Auditor General. This is the 4th consecutive unqualified audit report.

Income Statement

Income

Grant - this includes the first receipt (\$0.25m) of the additional “ring-fenced” \$1m provided for specific activities, namely: \$0.5m for marketing partnerships to open up new opportunities; \$0.4m for training initiatives in the tourism sector and; \$0.1m to support the Beach Economy vision.

Tourism Authority Fee - these are currently slightly ahead of budget.

Direct Cost

Overall direct costs are \$2.15m below budget which includes \$0.5m of budgeted spend on the specific activities noted above. This is mainly due to the timing of promotions and payments. The budgets are expected to be fully utilized during the 2nd half of the year. Details of each of the division’s activities are elsewhere in the report.

Structure, General & Administration

These are generally on, or under budget except for professional fees which includes the cost of rebranding the Visitor Service Centres and fees in relation to the migration to a new IT platform.

Balance Sheet

Bank - The balance at the end of the quarter was \$3.7m.

Accounts receivable and accrued income - this represents the hotel fees for June (not payable until 15 July) and any amounts overdue from previous months.

Vendor payables - of the \$1.3m payable, \$0.6m relates to marketing costs and \$0.3m for transportation passes for resale.

Accruals - this is mainly to payroll related costs and Sales and Marketing costs.

Income Statement

Bermuda Tourism Authority

For The Period Ended June 30, 2018

	Quarter 2, 2018			Year To Date		
	Actual	Budget	PY	Actual	Budget	PY
Income	9,394,772	9,252,590	8,827,160	16,449,100	16,299,029	15,314,192
Direct costs	5,071,412	6,311,085	4,213,684	10,999,099	13,156,410	11,441,443
Direct surplus (deficit)	4,323,360	2,941,505	4,613,476	5,450,001	3,142,619	3,872,749
Structure, general & administration costs	2,406,847	2,528,639	2,224,265	4,748,602	4,965,585	4,395,395
Operating surplus (deficit)	1,916,513	412,866	2,389,212	701,399	(1,822,966)	(522,645)
Net finance costs	4,813	3,916	5,130	25,999	23,805	33,890
Net surplus (deficit) for the period	1,911,700	408,951	2,384,082	675,400	(1,846,771)	(556,535)

Income Statement

Bermuda Tourism Authority For The Period Ended June 30, 2018

	Quarter 2, 2018			Year To Date		
	Actual	Budget	PY	Actual	Budget	PY
1. Income						
Grants, subsidy & contribution income	6,500,000	6,500,000	6,250,000	12,750,000	12,750,000	11,925,000
Tourism authority fee	2,894,772	2,752,590	2,577,160	3,699,100	3,549,029	3,389,192
	<u>9,394,772</u>	<u>9,252,590</u>	<u>8,827,160</u>	<u>16,449,100</u>	<u>16,299,029</u>	<u>15,314,192</u>
2. Direct costs:						
Sales & Marketing	3,872,458	4,976,887	3,136,490	9,126,456	10,825,274	9,685,441
Product development & experience	492,169	545,573	685,901	787,959	1,061,148	1,163,244
Research & business intelligence	85,496	264,625	98,856	185,030	368,988	194,167
Operations	621,289	524,000	292,438	899,654	901,000	398,592
	<u>5,071,412</u>	<u>6,311,085</u>	<u>4,213,684</u>	<u>10,999,099</u>	<u>13,156,410</u>	<u>11,441,443</u>
3. Structure, general & administration costs, split:						
Staff costs	1,658,014	1,740,135	1,587,658	3,242,598	3,401,583	3,174,071
Communications & IT	23,060	127,277	133,601	213,598	296,204	222,713
General expenses	194,911	257,732	155,803	350,646	454,575	354,938
Marketing	699	5,400	941	699	7,300	1,489
Premises	202,127	200,395	191,633	392,758	400,023	377,635
Professional fees	242,452	97,200	47,438	352,954	207,150	68,817
Transport	-	-	442	-	-	885
Grants / Investments	75,000	80,000	80,000	150,000	160,000	160,000
Equipment	10,585	20,500	26,750	45,350	38,750	34,848
	<u>2,406,847</u>	<u>2,528,639</u>	<u>2,224,265</u>	<u>4,748,602</u>	<u>4,965,585</u>	<u>4,395,395</u>

Balance Sheet

Bermuda Tourism Authority

June 30, 2018

ASSETS		Jun-18
Current Assets		
Cash & Bank		3,706,267
Accounts Receivable		681,043
Inventory		310,588
Accrued Income		580,126
Prepaid Expenses		95,753
Total Current Assets		<u>5,373,776</u>
Non-current Assets		<u>1,114,233</u>
Total Assets		<u><u>6,488,010</u></u>
EQUITY & LIABILITIES		
Equity		
Accumulated Surplus (Deficit)		2,794,809
Net Income		675,400
		<u>3,470,210</u>
Liabilities		
Current Liabilities		
Vendor Payables		1,342,257
Accruals		1,525,543
Deferred Income		150,000
		<u>3,017,800</u>
Total Equity & Liabilities		<u><u>6,488,010</u></u>

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TOURISM AUTHORITY

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