



# Q4 2018 Report

*Research &  
Business Intelligence*

BERMUDA

# ***During Q4 of 2018, the Research & Business (RBI) Intelligence Division accomplished the following:***

## **1. CRM Management:**

- a) The partner portal called “BTA Connect” was launched in October 2018 at the Annual Tourism Summit. This allows stakeholders to update their profiles on [gotobermuda.com](http://gotobermuda.com), access special reports and news. Vacation Rental owners/agents can also remit tourism authority fees through this portal.
- b) Stakeholder training was held in October and November and a vacation rental payment portal tutorial video was also created.

The screenshot displays the BTA Connect portal interface. On the left, a vertical sidebar menu includes links for HOME, PROFILE, VACATION RENTALS, COLLATERAL, OPPORTUNITIES, REPORTS, ADMINISTRATION, and QUESTIONS?. The main content area features a large image of a beach at night with people dining by candlelight. To the right of the image, a section titled "National Tourism Plan" is shown with a thumbnail image and a link to "View the Plan Here!". Below this, the "Post Board" section lists several items:

- National Museum of Bermuda - Katie Bennett - 12/20/2018 - National Museum of Bermuda Holiday/Winter Hours: The National Museum of Bermuda is now following a winter schedule, which means doors open at 10am and close at 4pm. We are open Boxing Day and New Years Day, just closed on Christmas.
- Dolphin Quest Bermuda - Sundie Faulkner - 12/14/2018 - Daily Dolphin Demonstration and Conservation Chat: Time: 1:45 pm Cost: Free with paid admission to the National Museum of Bermuda. Join the Marine Mammal Specialists at Dolphin Quest for an engaging dockside.

## 2. Continued Personal Information Inventory and PIPA compliance process.

**Benefits**

**Overview**

- Listings
- Offers
- Farm Trips
- Leads/RFPs
- Service Requests
- Press Mentions

**PRINT**

**Account**  
-All-

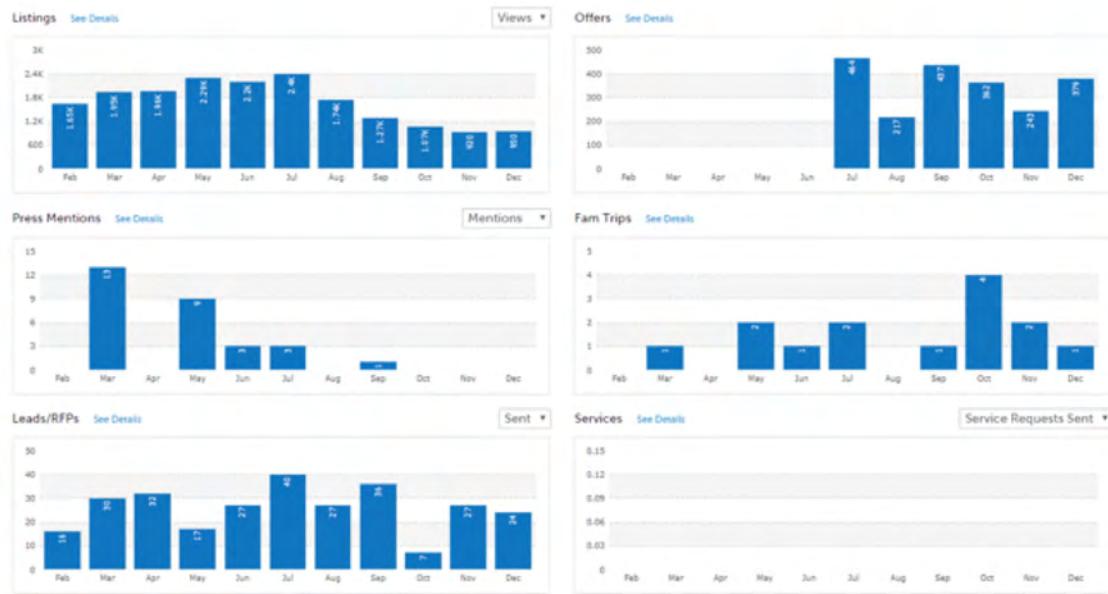
**Month**  
February

**Year**  
2018

**TO**  
**Month**  
December

**Year**  
2018

**UPDATE**



3. Successfully completed soft launch of online visitor arrival form, available to visitors in advance of arrival at [bermudaarrivalcard.com](http://bermudaarrivalcard.com). The information with visitors on events and activities prior to arrival. It also reduces the manual processing of visits allows the BTA to share or arrival forms.



### *Arrivals Just Got Simpler*

Visitor Arrival Cards can now be found online and completed before you arrive. It's quick and easy!

[TAKE A LOOK](#)



### WE'RE GLAD YOU'RE COMING TO VISIT

Thank you for filling out your visitor arrival form in advance. Please print a copy of the PDF attached to this email and show immigration officials in Bermuda along with your passport. That's it! Before you know it you'll be through the airport and living the island life.

# BERMUDA



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#### Visitor Info

Last Name	Middle Initial	
Smith	E	
First Name	Gender	
George	Male	
Citizenship/Nationality	Passport number	Expiration Date
United States	1234567	02/04/2026
Email		
gesmith22@gmail.com		
Date of Birth	Date of Arrival	Flight
06/01/1976	07/30/2018	AA1416

#### Home Address

Number / Street Name / Unit	State/Province/Region
123 Madison Avenue	NEW YORK
City/Parish	NEW YORK
Country	Zip/Postal Code
United States	10016
First trip to Bermuda?	Intended stay # nights
Yes	4

#### Primary Purpose of Visit

Vacation

#### Accommodation

Fairmont Southampton

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**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*

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# ***During Q4 of 2019, the Product & Experiences Division accomplished the following:***

## **1. BTA Experience Investment**

The 2018 Tourism Experiences Investment Process received 52 total applications, of which 25 were approved for support as they demonstrated overall alignment with BTA's objectives and strategy for 2019. 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 spending. The remaining experiences will continue to provide authentic and immersive offerings to enhance Bermuda's arts and culture assets. The list of approved experiences can be accessed here:

<https://www.gotobermuda.com/bta/tourism-experiences-investment>

## 2. BTA Activations and Sponsored Experiences Highlights

**Gombey International Festival Pilot Package (October 6)** – In partnership with the Department of Community & Cultural Affairs, the BTA piloted its first visitor package offering for the Bermuda International Gombey Festival. Certified Tourism Ambassadors and a local Gombey enthusiast hosted visitors for an immersive cultural experience at one of Bermuda's most popular fall offerings. The pilot sold 26 out of 30 packages. Visitor feedback was overwhelmingly positive. Guests enjoyed a pre-event cocktail hour and private photo opportunity with Gomebys, along with special reserved seating to watch performances by Bermuda Gombey troupes, international stilt walkers and other guests.

**Bermuda Street Food Festival (October 28)** – Expanding our culinary experience for visitors during the fall, the Bermuda Food Truck Festival evolved into the Bermuda Street Food Festival. 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 1771 attendees, of which 611 were cruise and air visitors.



## **2. BTA Activations and Sponsored Experiences Highlights cont.**

**Airbnb Experiences Information Session (November 28 & 29)** – 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 information sessions with Airbnb representatives on November 28 and 29. Over 130 people attended the sessions; there was 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.

**Bermuda Pilot Gigs Regatta** – 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.

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

**BLTA Junior ITF Tournament (October 13 – 20)** – Forty-two competitors and their support teams visited Bermuda for the 14th Bermuda ITF Junior Open. The tournament generated positive feedback from participants and extended promotion of Bermuda as a prime destination for competitive play.

## **2. BTA Activations and Sponsored Experiences Highlights cont.**

**Goslings Invitational Golf Tournament** – Taking place November 26 – 30, the Goslings Invitational 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.

**Goodwill Golf Tournament** – The 66th Goodwill Invitational tournament took place December 2 – 5 and was and attracted 30 teams and a total of 110 players, generating a total of 250 room nights.

**Round the Sound** - The 2018 event took place October 6th and attracted 327 international visitors who participated in an open water swim with varying distances.

## **3. Cruise Service Highlights**

**Disney Bermuda Cruises Launched** – 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 with this partnership was achieved, within 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.

### 3. Cruise Service Highlights

**Expanded Cruise Ship Schedule 2019** – by quarter-end it was confirmed that the 2019 cruise ship schedule would bring 192 calls to Bermuda, vs. 180 in 2018, and an estimated 544,000 passengers, a rise of 14% on the previous year. The increase in passengers is expected to generate \$7.9 million in tax revenue and increase visitor spending. BTA has successfully expanded calls in non-summer months and continued to seek additional calls to St. George's and Hamilton.

#### Experience Development Site Visit - *Norwegian Cruise Line*

– Successful meetings were held with the Norwegian Cruise Line Holdings (NCLH) leadership to discuss the 2018 cruise ship season, future development plans, onshore experience development in addition to 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 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.



### **3. Destination Services Highlights**

Hosting, logistics and on-island account liaison/support was successfully provided for a variety of clients and groups during the quarter, including BTA's own Tourism Summit on October 24 and:

**Family Travel Association Summit (October 7-11th, 2018)** - The BTA sponsored a 150-person welcome reception on Sunday, October 7th at the Commissioner's House in Dockyard to kick off the group's two-day Summit October 8th-9th. A post-summit site visit was held October 10-11th for the trade travel and media attendees who visited attractions, walked, cycled and boated with local tour guides, dined at local restaurants and utilized transport and caterers on the east and west end of the island.

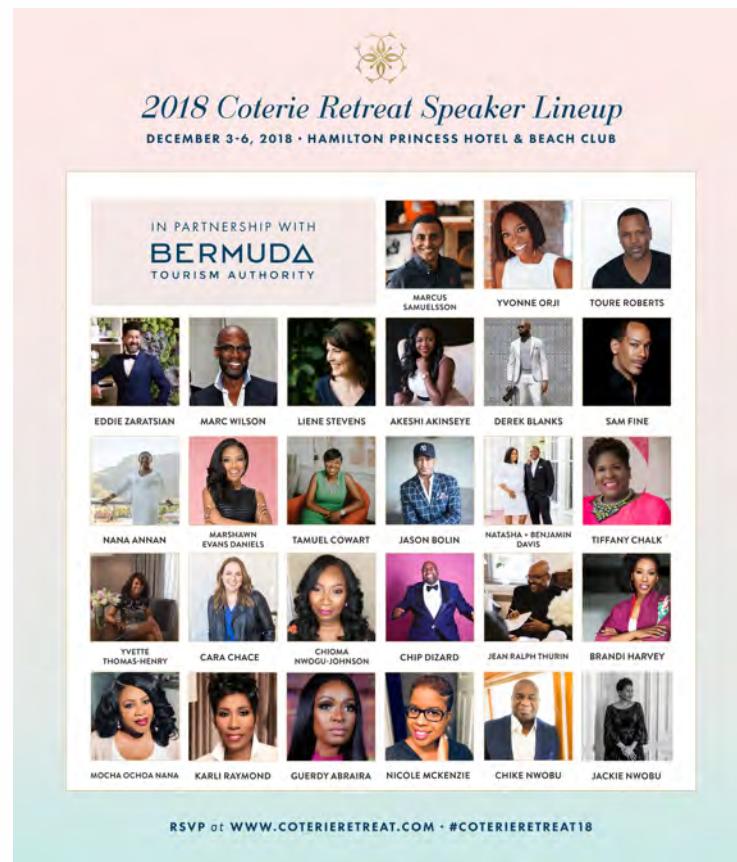
**Athlete's Summit – USTAF ( Thursday October 18th to Sunday, October 21st, 2018)** - Athletes from the USA Track and Field's Athletes Advisory Committee (USATF) chose Bermuda for its annual Elite Athlete Summit. The group planned to set its strategic goals and to boost the development of local athletes. The summit hosted 45 athletes and their security team at the Hamilton Princess and Beach Club.

**Encompass Insurance site visit (October 13-16, 2018)** - The soccer team from Alberta, Canada trained in Bermuda from 29th July - August 6th at the National Sports Centre. The group Willow Bank Hotel and participated in a variety of island activities. The team and their parents were also guests in the BTA's Cup Match Visitor's Viewing experience.

### 3. Destination Services Highlights cont.

**CHICOS (November 7-9<sup>th</sup>)**- 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 made up of international investors and operators, governmental representatives, opinion leaders, developers, bankers/lenders/investment funds, tourism officials, hotel brand executives, and many more. the BTA sponsored a 'Bermuda-themed' 150-person welcome reception, as well as a post-summit cruise for 50 persons to conclude the conference.

**Coterie Retreat (December 3-6<sup>th</sup>)** - 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. As sponsor, the BTA hosted a 120-person White Party at the Coral Beach Club complete with Bermuda wedding-themed inspirations. We also connected the organizers with local suppliers that extended on-island spend of the event



The graphic features a grid of 28 headshots of speakers, arranged in four rows of seven. The top row is labeled "IN PARTNERSHIP WITH BERMUDA TOURISM AUTHORITY". The names of the speakers are listed below their respective photos. The names include: MARCUS SAMUELSSON, YVONNE ORJI, TOURE ROBERTS, EDDIE ZARATSIAN, MARC WILSON, LIENE STEVENS, AKESHI AKINSEYE, DEREK BLANKS, SAM FINE, NANA ANNAN, MARSHAWN EVANS DANIELS, TAMUEL COWART, JASON BOLIN, NATASHA BENJAMIN DAVIS, TIFFANY CHALK, YVETTE THOMAS-HENRY, CARA CHACE, CHIOMA NWOGU-JOHNSON, CHIP DIZARD, JEAN RALPH THURIN, BRANDI HARVEY, MOCHA OCHOA NANA, KARLI RAYMOND, GUERDY ABRAIRA, NICOLE MCKENZIE, CHIKE NWOBU, and JACKIE NWOBU. The graphic includes the text "2018 Coterie Retreat Speaker Lineup" and "DECEMBER 3-6, 2018 • HAMILTON PRINCESS HOTEL & BEACH CLUB". At the bottom, it says "RSVP at [WWW.COTERIERETREAT.COM](http://WWW.COTERIERETREAT.COM) • #COTERIERETREAT18".

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# *Sales & Marketing*

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# Travel, Roomnights Group & PR Dashboard

KEY METRICS	YTD 2017	YTD 2018	2017 YEAR END ACTUAL	PLAN GOAL 2018	% OF PLAN GOAL YTD	% Δ YOY (YTD)
Total Visitor Spending Influenced by BTA	\$92,188,937	\$91,678,556	\$92,188,937	\$87,200,000	105%	-1%
Visitor Spending Leisure	\$52,591,006	\$57,423,972	\$52,591,006	\$56,700,000	101%	9%
Visitor Spending Group	\$39,597,931	\$34,254,583	\$39,597,931	\$30,500,000	112%	-13%
Sales Group Spending	\$30,424,841	\$25,970,204	\$30,424,841	\$24,400,000	106%	-15%
Product Group Spending	\$9,173,090	\$8,284,379	\$9,173,090	\$6,100,000	136%	-10%
Total Room Nights Influenced by BTA	131,029	139,566	145,541	137,500	102%	7%
Total Leisure Room Nights	82,969	108,087	87,560	95,900	113%	30%
Total Group Room Nights	48,060	31,480	57,981	41,600	76%	-34%
Sales Group Room Nights	31,392	24,662	31,392	31,500	78%	-21%
Product Group Room Nights	15,609	6,818	15,609	10,100	68%	-56%
S&M Group Sales Leads	505	471	505	610	77%	-7%
S&M Group Sales Calls	454	502	454	527	95%	11%
Number of Journalists Assisted	2,446	6,760	2,446	2,500	270%	176%
*Earned Media Generated	\$17,662,754	\$7,446,061	\$17,662,754	\$8,000,000	93%	-58%
*Coverage in Top 100 US Outlets	69	92	61	61	151%	33%
*Average Quality Coverage Score	71%	81%	71%	71%	114%	13%
PR Impressions Generated	1,831,831,204	1,194,601,236	1,831,831,204			-35%

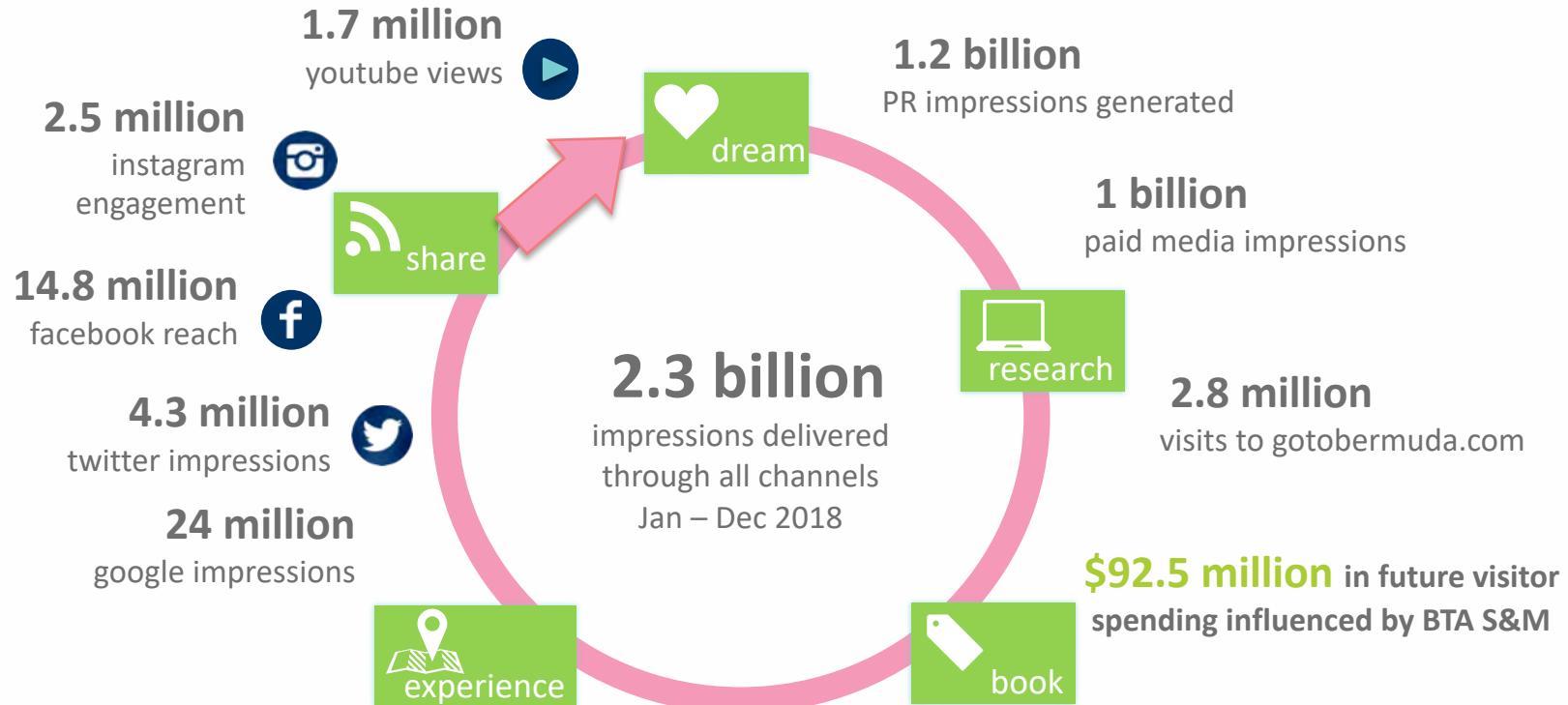
# Digital Dashboard

Key Metrics	YTD 2017	YTD 2018	Goal 2018	% of Goal YTD	% Δ YOY (YTD)
Total Website Visits	2,377,466	2,802,796	2,448,790	114%	18%
Desktop Traffic	992,312	966,168			-3%
Mobile Traffic	1,023,630	1,105,616			8%
Tablet Traffic	267,062	259,050			-3%
Website Page Views	5,655,727	6,832,918	5,655,727	121%	21%
Time on Site	2:04	2:11	2:04	106%	6%
Newsletter Subscribers	243,672	259,609	250,982	103%	7%
Newsletter Open Rate	11%	15%	12%	121%	38%
Consumer Inquiries	594	804			35%
Internet/Email	257	378			47%
Phone	337	426			26%
Brochure Requests	36,371	85,817			136%
Individual	6,752	12,552			86%
Bulk	22,986	9,454			-59%
Brochure Downloads	6,633	84,096			1168%

# Social Dashboard

Key Metrics	YTD 2017	YTD 2018	Goal 2018	% of Goal YTD	% Δ YOY (YTD)
Facebook Followers (month gained/YTD total)	347,222	357,414	372,062	96%	3%
Facebook Total Reach	14,890,181	14,789,653	21,590,762	68%	-1%
Facebook Total Engagement	1,665,138	3,075,538	2,414,450	127%	85%
Facebook Engagement (likes/comments/shares)	515,173	3,075,538		497%	
Facebook Engagements (clicks/video views)	1,149,965	0			
Twitter Followers (month gained/YTD total)	25,713	27,859	28,857	97%	8%
Twitter Impressions	3,396,832	4,317,628	4,132,521	104%	27%
Twitter Engagement	123,565	209,795	160,635	131%	70%
Instagram Followers (month gained/YTD total)	42,796	58,074	54,809	106%	36%
Instagram Engagement	848,316	2,459,093	933,147	264%	190%
Instagram Story Engagement		0			
Instagram Story Impression		0			
YouTube Subscribers (month gained/YTD total)	1,942	2,234	2,330	96%	15%
YouTube Total Views	1,659,955	1,701,788	3,734,899	46%	3%
YouTube Minutes Watched	1,428,977	1,400,055	2,572,159	54%	-2%
Pinterest Followers (month gained/YTD total)	2,440	2,507	2,635	95%	3%
Pinterest Repins	1,884	997	1,959	51%	-47%

# 2018 YTD Marketing Snapshot



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# *Sales & Event Engagement*

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# *Sales*

Event	Location	Start	End
Virtuoso Webinar	NYC	10/02/18	10/02/18
Travel Agent FAM	Bermuda	10/07/18	10/10/18
IMEX America	Las Vegas, NV	10/16/18	10/18/18
American Express Platinum & Centurion Call Center	Sunshine, FL	11/01/18	11/01/18
Luxury JetSetter Group Press Trip	Bermuda	11/03/18	11/06/18
Financial & Insurance Conference Planners (FICP)	Orlando, FL	11/04/18	11/07/18
Virtuoso FAM Trip	Bermuda	11/05/18	11/09/18
AAU/Harvard Sports/ Fam Trip	Bermuda	11/05/18	11/08/18
Client Familiarization Trip	Bermuda	11/09/18	11/11/18
ALHI Luxury Showcase	NYC	11/13/18	11/13/18
Attend MPI Philly Chapter Event sponsored by Fairmont Southampton	Philadelphia	11/14/18	11/14/18
David Tutera site visit	Bermuda	11/17/18	11/19/18
Munaluchi Coterie Retreat	Bermuda	12/03/18	12/05/18
Virtuoso Fam Trip	Bermuda	12/03/18	12/07/18

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# *Sales Engagement Highlights – Destination Training*

Virtuoso Webinar - October 2

Trained 25 agents

Family Travel Association - October 7 - 10

Trained 120 agents

American Express Platinum & Centurion – November 1

Trained 75 agents

# *Sales Engagement Events – Meetings Market*

IMEX America  
Las Vegas, NV  
October 15 - 18

Participated in 50 one-on-one meetings  
6,352 attendees

ALHI Luxury Showcase  
New York, NY  
October 30

Participated in table top reception.  
130 attendees

FICP  
Orlando, FL  
November 4 - 7

Networking Events with 1,200 attendees

MPI  
Philadelphia  
November 14

Participated in reception with 50 attendees  
20 certified meeting planners

Co-Hosted Event (Chili Party) Vineyard Events  
November 9 – 12

40 New York clients, 6 co-hosts



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# *Sales Engagement Events – Sports Market*

WTS Store Activation

New York, NY

Bryn Mawr, PA

Millburn, NJ

December 11 - 13

300 attendees, 8 on-site registrations



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# *Sales Engagement Events – Site Visits & Educational Trips*

Family Travel Association Fam Trip

October 10 - 12

9 travel professionals



Virtuoso Fam Trip

November 5 - 9

5 clients

Meeting Planners Fam Trip

November 9 - 12

4 clients

Virtuoso Fam Trip

December 3 - 7

7 agents



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# *Paid Media & Partner Marketing*

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# *Overview*

- Over 170.6MM gross impressions (inclusive of offline + online media)
- 801,659 digital media web visits
- 5.8MM non-web engagements (i.e. video views, rich media engagements and custom content engagement)
- Cost-per-Engagement averages \$0.18 in Q4 (well below our goal of \$2.00)
- Q4 Arrivalist Data:
  - 5,896 arrivals reported by Arrivalist in Q4 (inclusive of both 2017 + 2018 media)
  - 92.7MM exposures
  - \$208 Cost-Per-Arrival (slightly higher than our goal of \$200 or less)

# ***BRAND RESULTS***

*High level overview of performance for all paid media under the Brand and Integrated Packages campaigns*

- **119.3MM Impressions**
- **5,296,643 Engagements**
- **\$0.12 Cost-Per-Engagement**
- **1,665 Signals of Intent; Click-to-Book**
- **2,050 Arrivals recorded by Arrivalist**
- **Top performers for driving web traffic in Q4: TripAdvisor, Diligent, Sojern, Adara, and Facebook/Instagram**
- **TripAdvisor Sponsored Content Page Views are approx. 30% higher than at the end of Q4 2017**

*\*\*Encompasses 2018 Integrated Packages*

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# *Broadcast*

## NEW YORK

### **ABC October Weather Sponsorship**

- Flight Dates: October 1 – October 31
- Good Morning America & ABC7 Eyewitness News
- Customized :10s billboard including BTA footage leading in or out of weather segment
- :30s spot following billboard
- 5x per week

## BOSTON

### **ABC October Weather Sponsorship**

- Flight Dates: October 1 – October 31
- Good Morning America
- Customized :10s billboard including BTA footage leading in or out of weather segment
- :30s spot following billboard
- 3x per week

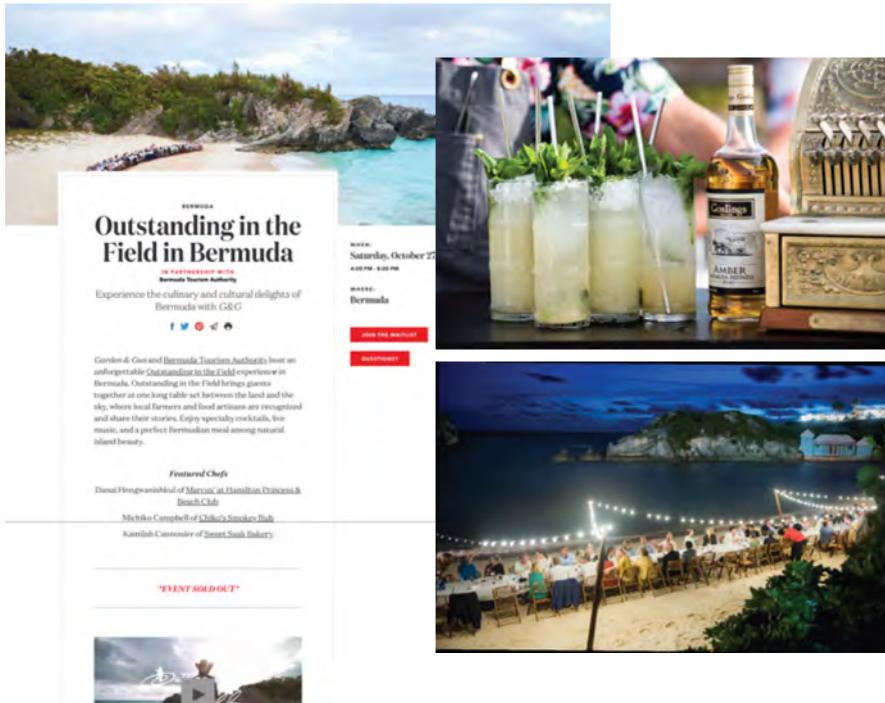
# Garden & Gun: Outstanding in the Field Event

## Garden & Gun Event Partnership - October 27

- A showcase of Bermudian culinary and musical artists
- 154 qualified consumers in attendance

## Event Promotion included

- Full-page promotion in June/July 2018 issue
- Email to 19,132 opt-in subscribers
- Outstanding in the Field newsletter to 70k subscribers
- Social promotion via Facebook, Instagram, and Twitter





# ITU OVERVIEW

## CAMPAIGN DETAILS

- **Objective:** Reach marathon runners/triathletes to bring Bermuda's April ITU event to their attention and encourage registration sign ups
- **Flight Dates:** 11/8/18 - 3/27/2019
- **Geo-Targeting:**
  - New York Tri State, Boston, DC Metro, Chicago, Philadelphia, Toronto, Hartford, San Fran
- **Channels:**
  - Digital Display
  - Dedicated Email
  - Paid Social - Facebook + Instagram

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# Triathlon Digital Creative

Quick! Visit These Hidden Travel Destinations Before the Word Gets Out

GEN ARMED WITH CONFIDENCE. LEARN MORE

alz.org/brain alzheimer's association

START SLIDE SHOW

Earn Double Points on every stay through August 31

BERMUDA ENTER NOW

Amplify your communication skills with hands-on

Hilton Join for free

## 22 Most Traveled Place, According To Travel Agents

Top travel agents have been keeping their eyes on the scene and noticing some major travel trends this year.

BY LAUREL WALSH

we are fully shook. If there was ever a time to check on your year's #TravelGoals and personal bucket list, this is it.

Millions of people have visited their dream destinations in the past few months, and millions more will travel even further before 2018 is done. From bungee jumping off

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# *OTA Program Highlights*

## ACTIVITY

- OTA encompasses Expedia (includes Travelocity, Hotels.com, Orbitz, etc.) and TripAdvisor
- Total OTA Q4 Impressions: 8.54MM
  - Expedia generated 4.99MM of total impressions, driving traffic both on-site and off-site
  - TripAdvisor generated the remaining 3.55MM impressions in Q4
- TripAdvisor remains the top driver of Arrivals reported by Arrivals
  - TripAdvisor: 741 Arrivals from 2018 + 2017 media combined (Q4 Arrivals Only)
  - Expedia: 121 Arrivals from 2018 + 2017 media combined (Q4 Arrivals Only)
- TripAdvisor Sponsorship Page generated over 244.8K page views in Q4
  - Approx. 30% increase from this same time period in 2017
- Expedia reports a gross decrease of -2% in hotel bookings YoY in Q4 alone
  - All previous quarters saw steady increases, Nov and Dec are the only two months in 2018 that saw a decrease in Hotel Gross Bookings

# *Web Metrics*

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# *Total Site Traffic & Goals*

- 101% more YOY site sessions (visits) Q4 2018
- 121% more YOY page views Q4 2018
- 30% of all sessions completed a conversion goal in Q4 2018
- Conversion Goal Completion
  - Time on Site Over 3:00 – 158,100 – **211% increase vs Q4 2017**
  - Hotel Inquiry – 10,821 – **41% increase vs Q4 2017**
  - Booking Widget Clicks (New in 2017) – 7,745 – **30% increase vs Q4 2017**
  - Brochure Downloads – 8,660 – **82% increase vs Q4 2017**
  - Brochure Orders – 1,963 – **166% increase vs Q4 2017**
  - eNews Registration – 3,356 – **257% increase vs Q4 2017**

## *Total Site Referrals Traffic*

- Total Partner Referrals – 50,904
  - Profile referrals – 33,016
  - Deal referrals – 14,263
  - Event referrals – 3,625
- Total Partner Pageviews – 287,390
  - Profiles – 129,577
  - Deals – 136,736
  - Events – 21,077
- 18% Click through rate to Partners

## *SEM Performance*

Month	Impressions	Clicks	CTR	CPC	Spend	Conversions
October	953,405	36,790	3.86%	\$ 1.12	\$ 41,353.78	13,133
November	837,038	28,612	3.42%	\$ 1.30	\$ 37,256.79	9,298
December	768,152	27,728	3.61%	\$ 1.49	\$ 41,233.86	8,762
Total	2,558,595	93,130	3.64%	\$ 1.29	\$119,844.43	31,193

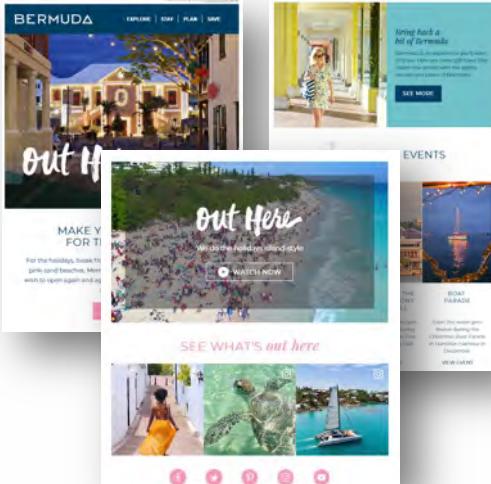
- In Q4'18, SEM campaigns saw a decrease on cost per conversions; dropping from \$4.17 (Q4-'17) to \$3.84, allowing us to see 12.6k+ more conversions than the same period last year.
- Our CTR fluctuated, but remained competitive with an average of 3.64% for the quarter. (Up 0.16% quarterly, Up 1.11% YoY)
- Total spend for the quarter was \$119,844.43, with 31,193 total conversions (up 68% YoY).

# *eNewsletter Overview*

BERMUDA

# Overview & Highlights

## OCTOBER ENEWSLETTER

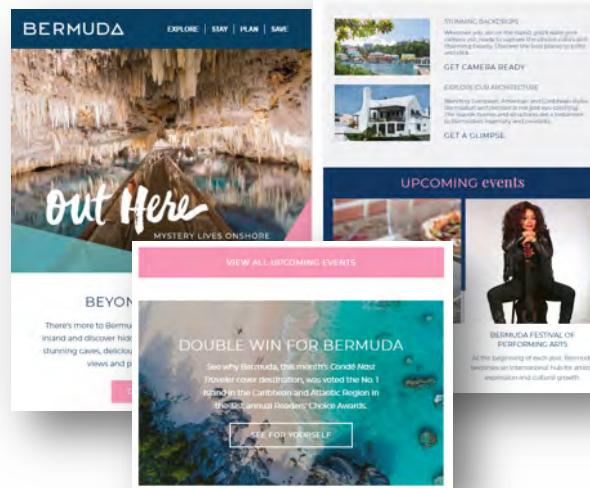


Open Rate: 31%

Click-to-open Rate: 4%

Top Clicked Link: Main CTA

## NOVEMBER ENEWSLETTER

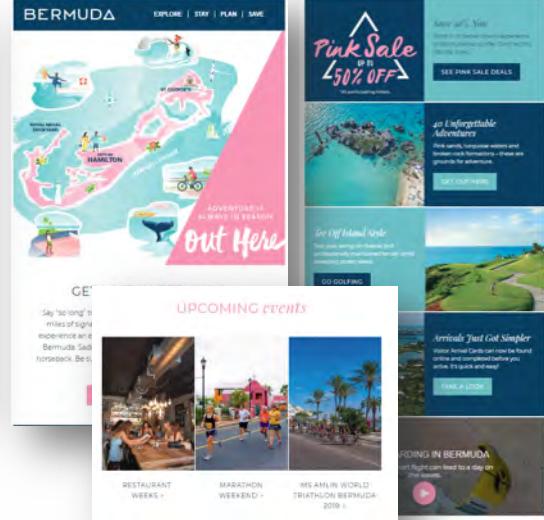


Open Rate: 10%

Click-to-open Rate: 17%

Top Clicked Link: Video

## DECEMBER ENEWSLETTER



Open Rate: 21%

Click-to-open Rate: 16%

Top Clicked Link: Pink Sale

BERMUDA

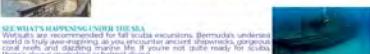
# Canadian Newsletter Overview & Highlights

OCTOBER 2018



## Autumn Adventures in Bermuda!

Bermuda is a year-round playground, with a moderate climate warmed by the Gulf Stream. It's a great place to visit during the summer months, and the island's 21 square miles. But if you're coming to Bermuda during the autumn months, when warm temperatures linger, you'll experience some of our most thrilling outdoor activities, delicious cuisine, and rejuvenating experiences.



TRAVEL TRADE CONTACT: [Charmaine Singh](mailto:Charmaine.Singh@bermudatourism.com) | [www.visitbermuda.com](http://www.visitbermuda.com)

Open Rate: 18%

NOVEMBER 2018



## Explore Bermuda's History & Culture!

Culture is the powerful undercurrent behind events in Bermuda. From street fairs and powwow dances to historical pageants, music, and theatrical performances, Bermudians celebrate their rich history through a variety of community events, making the island a destination for public and private events.

### NATIONAL MUSEUM OF BERMUDA

For four decades the National Museum of Bermuda has been a steward of Bermudian cultural heritage, championing its preservation through collecting practices, exhibition, restoration projects, conservation research, and education. The museum's public programs include lectures and archaeology.



### BERMUDA NATIONAL TRUST MUSEUM IN THE GLOBEOTHEQUE

In the Trust's care are 82 properties, covering some 277 acres, and representing much of the best of Bermuda's heritage – an incredible variety of man-made structures, from ancient ruins to modern mansions, from inland and coastal. The Trust's historic homes display an outstanding collection of rare artifacts, documents, and photographs, along with numerous maps and paintings all contributing to the intriguing story of our island's past. The Trust is also a leading advocate for Bermuda's natural and cultural heritage on a national level.



TRAVEL TRADE CONTACT: [Sally Perry](mailto:Sally.Perry@bermudatourism.com) | [www.visitbermuda.com](http://www.visitbermuda.com)

Open Rate: 17%

DECEMBER 2018



## Bermuda's Indulgent Spa Experiences!

Looking for inner harmony and peace? Bermuda's 50+ spas offer rejuvenating oasis of Bermuda's many full-service spas. Descend into an otherworldly cave surrounded by flickering candles and underground pools or enjoy an oceanside massage where the sound of waves brings you complete serenity.

**HOT STONE MASSAGE AT NATUMA SPA—GROOTHOEK BAY BEACH RESORT**  
Descend into an ancient cave with shimmering pools and candlelight for an intimate massage. The heat of the stones relaxes your muscles while the serene stillness is the ultimate way to find zen.



**SHAMMAZEE RITUAL AT THE SPA AT ELBOW BEACH—ELBOW BEACH RESORT**  
Soak in the intimate atmosphere at this oceanfront retreat and enjoy the ritual of a traditional Shammazee. This ancient ritual originates in India. It is a welcoming foot ritual, body scrub, bath and a full body and scalp massage – and your very own Hammam Soak, of course.

**SENSE OF BERMUDA EXPERIENCE AT SENSE, A BERMUDIAN SPA—BOSWELL'S HOTEL**

Escape from the everyday at this soothing spa, complete with a luxurious relaxation room and serene reflecting pool. The Sense of Bermuda Experience, one of the most unique spa experiences in the Caribbean, starts with a Solar Warming Massage, signature facial, Swizzle Manicure and Pedicure as well as a Sweet Island Lotion.



TRAVEL TRADE CONTACT: [Sally Perry](mailto:Sally.Perry@bermudatourism.com) | [www.visitbermuda.com](http://www.visitbermuda.com)

Open Rate: 17%

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# *Promotions & PR*

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# *North American Coverage Highlights*

## **YTD COVERAGE SNAPSHOT**

- Number of Articles: 204
- Impressions: 1,262,769,446
- Media Cost: \$6,370,075.76
- Average Score: 81
- Distributed 44<sup>th</sup> Annual Bermuda Festival, 12 Days of Holiday Fun, Bermuda and Airbnb partnership, and Splash Sale announcements via PR Newswire.



*NBC: Today Show - October 16  
Bermuda Triangle Feature*

**BERMUDA**

## ***North American Coverage Highlights***

# HEMISPHERES.



**Return Flight**  
Bermuda's national bird, the cahow, is dead as a dodo no more

For the past 15 years, tiny Nonsuch Island in Bermuda's Castle Harbour has served as a farm, a pony-leap government station, and a rookery school for delinquent boys. Now, this scrubby outcrop is the home base of a groundbreaking initiative to bring Bermuda's national bird,

say devil crabs—had been breasted out of existence. "Humans really caused about a million deaths from species alone," says De la Walker, principal author of the *Bermuda Aggression*. Moreover, she adds, "We basically pushed them to the point of extinction in six years." Then, in 1993, reconservationists established a breeding flock of nesting shore larks on a few rocky ledges near St. Georges.

"In the science community, it was like finding a node walking down from heaven," says senior terrestrial

current seedbeds off their bucket list. The economy is extremely fragile—one negative Argentinean essay can easily destroy the whole program—so most visitors are required to stay off cameras and watch the tawdry live and listen to quiet from hosts. (A lucky few can visit the island in full bloom by signing up for a tour with the **Island Ecological Society**.)

Despite all the fun, the authors don't seem to mind they're touring in cold weather. "They're very hard back," Madelaine says as he puts a double, drivers' driving golfball out of his seat. "Very Remington."

the cakewalk (or Bermudian) per-

say devil crabs—had been breasted out of existence. "Humans really caused about a million deaths from species alone," says De la Walker, principal author of the *Bermuda Aggression*. Moreover, she adds, "We basically pushed them to the point of extinction in six years." Then, in 1993, reconservationists established a breeding flock of nesting shore larks on a few rocky ledges near St. Georges.

"In the science community, it was like finding a node walking down from heaven," says senior terrestrial

current seedbeds off their bucket list. The ecosystem is extremely fragile—one negative Argentinean may not destroy the whole program—so most visitors are required to stay off-stumps and watch the tawny owls and Least Squid from boats. (A hucky few can actually head to full-scale spring by signing up for a tour with the [Buenos Aires Ecological Society](#).)

Despite all the fun, the ashatori don't seem to mind they're torturing tree celebrities. "They're very hard back," Madetato says as he puts a shriveled, drooping piffball out of its nest. "Very Resemblous."

## *Hemispheres – November 1 Destination Feature*

# TRAVELAGE WEST



*TravelAge West* - October 1  
*Destination Feature*

# The Washington Post

#### **WHAT'S THE DEAL?**

**Land**  
**• Save 10 percent on a last-minute gourmet package at Borgo Pignano, an estate in Tuscany.** The deal costs \$717 per person double and includes three nights' accommodations; a bottle of wine; daily organic breakfast; pasta cooking class; tour of the property's farm, honey-making operation and lab, where jams, soaps, sauces and more are made; five-course tasting menu.

[borisignuma.com/en](http://borisignuma.com/en).  
With the **Bermuda Tourism Authority's** Splash Sale, save 30 percent to 50 percent on more than a dozen island properties. For example, rates start at \$255 a night at the Fairmont Southampton (down from \$535-\$334 at the Hamilton Princess Hotel & Beach Club (vs. \$539) and \$1,401 at Rosewood Tucker Point (was \$1,979). Taxes included. Book by Oct. 16 for travel through April 30. Info: [gotobermuda.com](http://gotobermuda.com).

**Bahamas**, an adults-only all-inclusive, is offering a Fall Into the Holiday Spirit sale, with savings of up to 45 percent. For example, a four-night stay over Thanksgiving weekend starts at \$1,406 per couple, including taxes, a savings of \$1,150. Rate includes all meals, snacks and beverages, including a special Thanksgiving dinner; WiFi; daily activities, including a picnic excursion to Cabbage Beach; gratuities; and taxes. Valid through June 30. Info: 888-645-5550, [warwickstelz.com](http://warwickstelz.com)

**Sea**  
• Uniworld Boutique River Cruise Collection is offering 20 percent off India, Egypt,

**Info:** united.com.  
• **Air China has sale fares from Washington Dulles to several cities in China.** For example, round-trip fare to Xiamen starts at \$648, including taxes; other airlines are matching, but fares typically start at about \$930. Restrictions vary by destination. Book by Oct. 31 at [airchina.us](http://airchina.us).

**Package**

- Aer Lingus Vacation Store is offering **\$100 savings** on selected trips to Ireland for vacation or weekend getaways.
- Breakfasts Plus Doublin vacation departing in November starts \$938 per person double and includes round-trip airfare from Washington Dulles to Dublin; two nights' hotel in Dublin; three days of a bed-and-breakfast stay at breakfasts throughout Ireland; car rental, daily breakfast and taxes. Book by Oct. 31; request promo code WAPO100. Info: 800-465-1632, [www.aerlingusvacationstore.com](http://www.aerlingusvacationstore.com).

*Carol Scotti, Aer Lingus*

**WHAT'S THE DEAL?**  
*This week's best travel bargains around the globe.*

**• Save 10 percent on a last-minute gourmet package at Borgo Pignano, a villa in Tuscany.** The deal includes dinner and breakfast for two nights' accommodation; a bottle of wine; daily organic breakfast; pasta cooking class; tour of the villa's famous vineyard; operating costs; local taxes; jams, soaps, and more; made-five-course tasting menu; and a 10 percent discount on all purchases. Call 800-257-2047 or visit [www.wanderlust.com](http://www.wanderlust.com).

**Air**  
• **In honor of California** declaring itself the official state of surfing, United **surfboard fees** for passengers traveling to or from the Golden State will be waived. Surfboards, surfboards, wakeboards and paddleboards flying on United and United Express flights through April 30 are included. Book by Oct. 16 for travel through April 30. Info: [www.united.com](http://www.united.com).

**Warwick Paradise Islands—Bahamas**, an adults-only all-inclusive resort, has added a new \$100-per-person-per-night package that includes round-trip airfare from New York City's JFK Airport to the resort's private island, the ability to check bags at no extra charge and a \$100-per-person-per-night gratuity.

the Hollister Inn, with  
a savings of up to 45 percent. For  
example, a four night stay over  
Thanksgiving weekend starts at  
\$14,06 per couple, including  
taxes, a savings of \$1,350. Rate  
includes all meals, snacks and  
beverages, including a special  
Thanksgiving dinner; WiFi; daily  
excursion to Cabbage Beach;  
gratuities; and taxes. Valid  
through June 30. Info: 888-645-  
5550, [www.wickeshotels.com](http://www.wickeshotels.com).

**Sea**  
• Uniworld Boutique River Cruise Collection is offering 20 percent off India, Egypt.

*The Washington Post* – October 14  
*Splash Sale Feature*

# BERMUDA

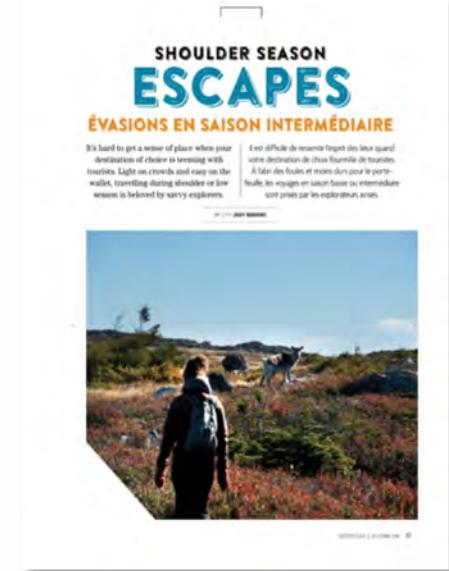
# North American Coverage Highlights

MODERN LUXURY



Modern Luxury Manhattan, Boston Commons, Capitol File, Jezebel, LA Confidential, Michigan Ave, Palm Beach, Philly Style, and Silicon Valley - November 1 Destination Feature

WESTJET MAGAZINE



WestJet Magazine - October 1  
Destination Feature

O  
THEOPRAHMAGAZINE



O, The Oprah Magazine - December 14  
Destination Feature

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# Holiday Native Content Highlights



## The Only Bermuda Guide You'll Ever Need



Photo: FATH\*M



Photo: FATH\*M



Photo: FATH\*M



## The Bermuda Mini Guide

In partnership with our friends at  
**BERMUDA**  
TOURISM AUTHORITY

Mention Bermuda and some people imagine the perfect place for a golfing weekend. Some imagine a tropical destination of pink sand beaches. Some imagine a mysterious triangle that has a history of disappearing any vessel that gets too close. In fact, a big part of the appeal of the island is that it is many things to many people. (One of the only things Bermuda is not is in the Caribbean, as many believe—it's closer to North Carolina than Florida, and a quick two-hour flight from most East Coast cities.) A British territory since 1612, Bermuda has a culture steeped in tradition and history. Candy-colored eighteenth-century buildings punctuate the tiny capital of Hamilton, cricket is easily the most popular sport, and you'll still see men wearing the blazer, tie, Bermuda shorts, and knee socks combo. That's not to suggest Bermuda is stuck in the past. On the contrary, elegant new hotels have added a shot of glamour, while the best you'll find anywhere (and did we mention winter temperatures hover around seve



### Hamilton Princess & Beach Club

The iconic Hamilton Princess reopened in 2016, known locally as the "pink palace" for obvious reasons. In addition to a top-to-bottom refresh of all 410 guest rooms, a big investment was made in the art collection and the creation of a contemporary gallery within the hotel. You'll find pieces from Jeff Koons, Andy Warhol, Damien Hirst, and Robert Rauschenberg. And even if you aren't staying here, you can sign up for a guided tour to learn about it all.

### Rosewood Bermuda

Fresh off a brand-new renovation, Rosewood's pale-pink Bermuda property is small in size (only eighty-eight guest rooms) but has the amenities of a full-scale resort. Spread across 240 acres in Tucker's Point, there are three restaurants, a 12,000-square-foot spa, a private pink sand beach, infinity pools, and a golf and tennis club. We especially love the dive and watersports center, where you can arrange epic shipwreck (the island is famous for them) and reef scuba diving, snorkeling trips, and kayaking along the coastline. Rooms are serene and pristine, outfitted in creams and whites, with views of either the ocean or the harbor.

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# ***North American Press Trips***

## PRESS TRIP UPDATES

### Group press trips

- Family Travel Association Summit – 14 outlets
- Luxury FAM – 4 outlets
- Mountain Biking in Bermuda – 2 outlets
- CHICOS – 3 trade outlets

### Individual press trip

- Holiday Native Content – 1 outlet

# *Canadian Media Coverage Highlights*



Le Journal de Montréal – October

A screenshot of the Coup de Pouce Magazine website. The main image shows a beach scene with palm trees and turquoise water. The article title is "Les Bermudes : les «Hamptons» de l'océan Atlantique". The text discusses the island's beauty and history, mentioning landmarks like the Seven Sisters and the Great Sound. It also highlights the local culture and food.

Coup de Pouce Magazine - October

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# *Canadian Media Coverage Highlights*



CTV Ottawa - November

A travel article from Travel Industry Today. The title is "ENJOY A BERMUDAFUL GOLF GETAWAY". Below the title is the author's name, Anita Draycott, and a "SHARE ON FACEBOOK" button. The main image features a white golf ball on a tee in a lush green field, with a portrait of a woman with blonde hair to the right. The text of the article begins with a quote from Mark Twain: "21 NOV 2018: Mark Twain, the ever articulate, globetrotting American humourist, once remarked, 'You take heaven, I'd rather go to Bermuda.' Indeed, tiny, pristine Bermuda, a fishhook-shaped island 750 miles east of New York City, is blessed with an abundance of charms. It has the turquoise waters, blissful beaches and tropical flavours you'd find in the Caribbean, but with a refined British accent."

Travel Industry Today - November

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# *Canadian Media Coverage Highlights*



BT Toronto - December



En Route (print) - December

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*Social*

BERMUDA

# Top-Performing Posts



Reached Users: 68,860  
Reactions: 3,770  
Post Clicks: 3,637



Impressions: 11,599  
Engagements: 964  
Retweets: 80  
Likes: 161



Reach: 28,518  
Likes: 3,800  
Comments: 84

This quarter, winter arrived and content moved off the beach. The posts across all channels were a balance of scenery, history, holiday information, sale teasers, and general culture that took place across link clicks, photo, and video. This quarter also played into the weather FOMO being felt on the east coast, and worked hard to educate about Bermuda as a year-round destination. December especially was a month with no shortage of great content, with holiday videos, the Pink Sale and its teasers, the travel style quiz plus year-end wrap ups. At the same time, content was being added to and revamped on the website which meant we had countless new content options to choose from. Mid-November through December is usually a very competitive time on social, and while some results reflect that, many still exceeded expectations.

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# *Operations*

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# ***During Q4 of 2018, the Operations Division focused on the following:***

During Q4, Operations remained focused on the Hamilton Waterfront Visitor Services Centre build-out and the rollout of collection process, procedures and communication with the implementation of the newly legislated Vacation Rental Property Act.

## **Operations, General**

**Human Resources** - As at December 31, 2018 BTA had 43 employees in the Bermuda and New York offices. This includes full time, full time/permanent contract, and interns.

**Recruitment** - Recruitment efforts continuing in Q4 included:

***Business Development Specialist*** - Sales & Marketing

***Brand Events Manager*** - Sales & Marketing (Filled December 2018)

***External Relations Coordinator*** - Product & Experience (Filled November 2018)

BVSC Ltd. filled three of five full-time, permanent staff positions in Q4: Manager, Operations (start date of January 7, 2019), and two hourly supervisors (filled by former seasonal contractors).

**Employee Changes** - Chief Investment Officer (CIO), Roland “Andy” Burrows, resigned his position with the BTA on November 30th. Both the CIO and the Assistant Investment Manager position, which was a direct report, transitioned to the Bermuda Development Agency on December 1, 2018.

## Vacation Rental Properties

Implementation of the reporting and fee collection process started in Q4, via the BTA's stakeholder portal 'BTA Connect'. All Vacation Rental Properties (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 calculate and remit the 4.5% fee where required.

## Standards & Training

### National Service Standards Introduced

During Q4 Standards and Training focused on the promotion and execution of the National Service Standards Programme, as well as creating more value for NSSP awardees. The following additional benefits were rolled-out to further highlight certified businesses to visitors and locals:

- Acknowledgement of certification in Destination Magazine
- Business promotional videos
- Special Facebook highlight and congratulations
- Acknowledgment at our annual Tourism Summit
- Acknowledgement in all BTA seasonal brochures
- Promotional videos displayed in theatres
- Videos placed on business profiles on [gotobermuda.com](http://gotobermuda.com)

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



## Standards & Training cont.

### Recertified & Newly Certified Businesses

A number of businesses are currently in the recertification period, where they must again demonstrate their continued ability to meet or exceed the required service principles, and to have maintained their required levels of service throughout the year.

With 2 new businesses receiving certification during this quarter, the total number of certified businesses as of December 2018 stands at 18.

#### Newly Certified Businesses

- Rosedon Hotel
- & Partners

#### Existing Certified Businesses

- 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



## Standards & Training cont.

### Certified Tourism Ambassador Programme (CTA)

At year-end, the team focused on CTA retention via the following initiative:



**BERMUDA**  
TOURISM AMBASSADOR

**Phone Banking Event** -S&T Following on the successful event held at the end of Q3, the team enlisted the help of 8 CTA volunteers to personally call to remind, record points and take payments over the phone to encourage CTA's to renew.

At the close of the renewal period, 362 CTA's renewed their certification which represented 43% of CTA's eligible to renew. While this was a small increase over the 42% renewal rate obtained during the same time last year, it exceeded expectations due to the high volume of CTA's comprised of America's Cup volunteers requiring renewal in 2018. (see comparison chart below)

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.*

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## Standards & Training cont.

### Mystery Shopper Programme

Driven by the increase in businesses in the NSSP programme, the application process to accept new mystery shoppers opened in Q4. A CTA designation is a prerequisite to acceptance and 17 CTA's, from multiple ages brackets and backgrounds, became new mystery shopper. They joined 11 CTA's already on the team, resulting in 28 shoppers in the programme heading into 2019.

## Bermuda Visitor Services Centre LTD. (BVSC)

**Hamilton Waterfront VSC** - 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.

Video advertising, online booking and touchscreen kiosks are hallmarks of the new Visitors Services Centre model.

Currently in place at the Dockyard VSC, these features are the cornerstone of what's planned for the Hamilton location

The two-level (plus roof deck) Hamilton waterfront Visitor Services Centre is on a five-year lease with the City of Hamilton. The new facility will have visitor services and branded merchandise on the first floor, 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.



## Bermuda Visitor Services Centre LTD. (BVSC) cont.

### **BVSC - Dockyard Monthly Breakdown in Q4Retail**

#### **October 2018**

- In the month of October, based on our Foot Fall Counter, The VSC in Dockyard received 25,006 visitors. This number of visitors is directly related to the extended and densely packed cruise ship arrivals in dockyard during this month.
- Retail sales saw an increase of \$5,523.00 over plan. Plan: \$7,086.00 Actual: \$12,609.00
- Transportation sales saw an increase of \$149,427 over plan. Plan: \$142,068.00 Actual: \$291,995.00
- Tours and Experiences bookings came to 31 bookings for a revenue capture of \$155.00 or 5 dollars per booking.
- Wages paid saw a decrease of \$7,943.00 below plan. Plan: \$37,046.00 Actual: \$29,103.00. This can be related to a decrease in frontline staff and increased use of Senior/Roaming Ambassadors in an informational and booking capacity within the VSC locations.
- Ambassador Wages saw an increase of \$5,002.00 over plan. Plan: \$7,500.00 Actual: \$12,502.00. This can be related to the increased use of Senior/Roaming Ambassadors within the VSC locations.
- Labor percentage for the month of October came in at 9.6% of net sales totaling \$304,604.17. This labor percentage does not include Senior/Roaming ambassadors. Only frontline staff scheduled in our NCR Console program.

## Bermuda Visitor Services Centre LTD. (BVSC) cont.

### **BVSC - Dockyard Monthly Breakdown in Q4Retail**

#### **November 2018**

- In the month of November, based on our Foot Fall Counter, The VSC in Dockyard received 14,239 visitors. This number of visitors is directly related to the extended cruise ship arrivals in dockyard during this month.
- Retail sales saw an increase of \$8,307.00 over plan. Plan: \$1,130.00 Actual: \$9,437.00.
- Transportation sales saw an increase of \$102,079.00 over plan. Plan: \$19,631.00 Actual: \$121,710.00.
- Tours and Experiences bookings came to 30 bookings for a revenue capture of \$150.00 or 5 dollars per booking.
- Wages paid saw a decrease of \$4,654.00 below plan. Plan: \$25,419.00 Actual: \$20,765.00. This can be related to a decrease in frontline staff and increased use of Senior/Roaming Ambassadors in an informational and booking capacity within the VSC locations.
- Ambassador Wages saw an increase of \$3,749.00 over plan. Plan: \$2,000.00 Actual: \$5,749.00. This can be related to the increased use of Senior/Roaming Ambassadors within the VSC locations.
- Labor percentage for the month of November came in at 15.7% of net sales totaling \$131,146.25. This labor percentage does not include Senior/Roaming ambassadors. Only frontline staff scheduled in our NCR Console program.

## Bermuda Visitor Services Centre LTD. (BVSC) cont.

### **BVSC - Dockyard Monthly Breakdown in Q4Retail**

#### **December 2018**

- In the month of December, based on our Foot Fall Counter, The VSC in Dockyard received 3,098 visitors. This amount of visitors is directly related to the extended and densely packed cruise ship arrivals in dockyard during this month.
- Retail sales saw an increase of \$2,171.00 over plan. Plan: \$612.00 Actual: \$2,783.00. Majority of the retail sales came from the Hamilton container site.
- Transportation sales saw an increase of \$5,475.00 over plan. Plan: \$3,530.00 Actual: \$9,005.00
- Tours and Experiences bookings came to 23 bookings for a revenue capture of \$115.00 or 5 dollars per booking.
- Wages paid saw a decrease of \$5,934.00 below plan. Plan: \$21,759.00 Actual: \$15,825.00. This can be related to a decrease in frontline staff and increased use of Senior/Roaming Ambassadors in an informational and booking capacity within the VSC locations.
- Ambassador Wages saw an increase of \$250.00 over plan. Plan: \$1,000.00 Actual: \$1,250.00. This can be related to the increased use of Senior/Roaming Ambassadors within the VSC locations.
- Labor percentage for the month of December came in at 132.7% of net sales totaling \$11,787.77. This can be directly related to the reduced amount visitors to our VSC's, rapid decrease in cruise arrivals and needing to have 2 staff members in each location for security and coverage. This labor percentage does not include Senior/Roaming ambassadors. Only frontline staff scheduled in our NCR Console program

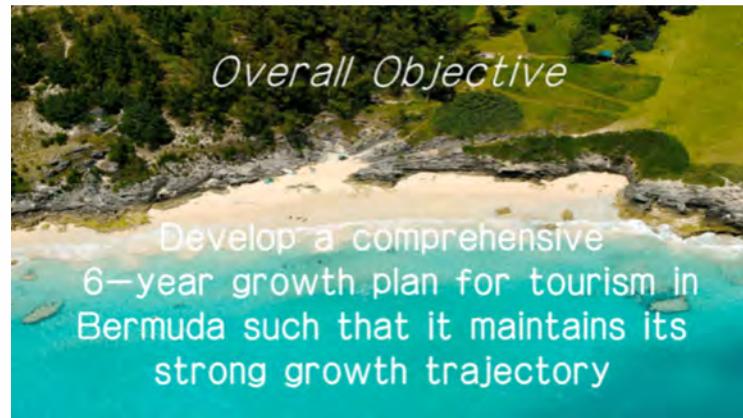
# *Strategy & Corporate Communications*

BERMUDA

# ***During Q4 of 2018, the Strategy & Corporate Communication accomplished the following:***

## **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.



As 2018 came to a close, it was clear that the same commitment to collaboration used to create the plan would also be required to execute it. Working groups – including members of our 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.

<h2>NTP Working &amp; Rapid Cycle Groups</h2>			
A	I	L	I
Awareness & Relevance	Infrastructure	Local Involvement	Innovation
Babymoons Rapid Cycle	Accessibility Working Group	CTA Syllabus Working Group	ADHT/ADHE Working Group
	Vacation Rentals Working Group		

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# *Financials*

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## Income Statement

### Income

**Grant** – this includes \$0.75m of the additional “ring-fenced” \$1m provided for specific activities, namely: \$0.5m for marketing partnerships to create new opportunities; \$0.4m for training initiatives in the tourism sector and; \$0.1m to support the Beach Economy vision. To date, only the Beach economy monies have been expended.

**Tourism Authority Fee** – these are currently \$268k above budget and \$208k ahead of the prior year. This also includes \$2k of revenue from Vacation Rentals (the fee is only due on new bookings made after 1 November 2018).

### Direct costs

Overall direct costs are \$2.7m below budget which includes \$1.0m of budgeted spend on the specific activities noted above (spend to date on these is \$0.1m). Details of each of the division’s activities are elsewhere in the report.

### Structure, General & Administration

These are generally on, or under budget with the exception of:

**Premises** – this includes the cost of moving the new office in New York. There was no budget for this in 2018 as the original lease ran until November 2019, but cost savings were achieved by moving in 2018.

**Professional fees** – includes fees in relation to the migration to a new IT platform.

## Balance Sheet

**Accounts receivable and accrued income** – this represents the hotel fees for December (not payable until 15 January) and any amounts overdue from previous months. Of the \$246k of accounts receivable, \$225k is current debt.

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

## Income Statement

Bermuda Tourism Authority

For The Period Ended December 31, 2018

	Quarter 4			Year To Date		
	Actual	Budget	PY	Actual	Budget	PY
Income	7,909,084	8,148,613	7,741,691	33,922,974	33,904,663	32,390,189
Direct costs	5,133,857	4,504,036	4,903,796	21,082,802	23,792,532	21,584,537
Direct surplus (deficit)	2,775,227	3,644,577	2,837,894	12,840,172	10,112,131	10,805,651
Structure, general & administration costs	2,722,389	2,552,495	2,554,169	9,864,522	10,039,760	9,311,686
Operating surplus (deficit)	52,838	1,092,082	283,726	2,975,650	72,371	1,493,966
Net finance costs	15,452	11,448	18,959	55,327	46,700	66,203
<b>Net surplus (deficit) for the period</b>	<b>37,386</b>	<b>1,080,634</b>	<b>264,767</b>	<b>2,920,323</b>	<b>25,671</b>	<b>1,427,763</b>

## Income Statement

### Bermuda Tourism Authority

For The Period Ended December 31, 2018

	Quarter 4			Year To Date		
	Actual	Budget	PY	Actual	Budget	PY
<b>1. Income</b>						
Grants, subsidy & contribution income	6,500,000	6,749,998	6,250,000	25,750,000	26,000,002	24,425,000
Tourism authority fee	1,409,084	1,398,615	1,491,691	8,172,974	7,904,661	7,965,189
	<b>7,909,084</b>	<b>8,148,613</b>	<b>7,741,691</b>	<b>33,922,974</b>	<b>33,904,663</b>	<b>32,390,189</b>
<b>2. Direct costs:</b>						
Sales & Marketing	4,061,158	3,498,587	3,983,242	17,327,416	19,355,248	18,158,928
Product development & experience	593,481	478,074	466,590	1,606,435	2,046,296	2,061,411
Research & business intelligence	251,002	123,375	269,789	588,740	626,988	611,289
Operations	228,217	404,000	184,175	1,560,212	1,764,000	752,909
	<b>5,133,857</b>	<b>4,504,036</b>	<b>4,903,796</b>	<b>21,082,802</b>	<b>23,792,532</b>	<b>21,584,537</b>
<b>3. Structure, general &amp; administration costs:</b>						
Staff costs	1,660,539	1,714,118	1,834,208	6,645,000	6,842,578	6,637,850
Communications & IT	107,036	126,975	135,764	480,264	550,305	509,479
General expenses	308,815	349,258	226,639	887,400	1,105,866	777,159
Marketing	1,807	1,300	1,305	4,452	10,400	8,448
Premises	353,146	200,394	190,150	949,792	800,811	760,637
Professional fees	113,199	65,950	121,533	524,549	339,800	265,974
Transport	-	-	-	-	-	1,328
Grants / Investments	132,401	80,000	80,000	282,401	320,000	320,000
Equipment	45,446	14,500	(35,430)	90,664	70,000	30,811
	<b>2,722,389</b>	<b>2,552,495</b>	<b>2,554,169</b>	<b>9,864,522</b>	<b>10,039,760</b>	<b>9,311,686</b>

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<b>ASSETS</b>	<b><u>Dec-18</u></b>
<b>Current Assets</b>	
Cash & Bank	5,939,147
Accounts Receivable	264,671
Inventory	88,755
Accrued Income	146,676
Prepaid Expenses	155,979
	<hr/>
Total Current Assets	6,595,228
Non-current Assets	1,863,241
	<hr/>
<b>Total Assets</b>	<b><u>8,458,469</u></b>
 <b>EQUITY &amp; LIABILITIES</b>	
<b>Equity</b>	
Accumulated Surplus (Deficit)	2,794,809
Net Income	2,920,324
	<hr/>
	5,715,134
<b>Liabilities</b>	
<b>Current Liabilities</b>	
Vendor Payables	1,050,607
Accruals	1,542,728
Deferred Income	150,000
	<hr/>
	2,743,335
	<hr/>
<b>Total Equity &amp; Liabilities</b>	<b><u>8,458,469</u></b>

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TOURISM AUTHORITY

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