Bermuda Tourism Summit 2015
Calling all Explorers, Partners & Believers

Digging Into Data

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Bermuda Tourism Key Performance Indicators

Management Metrics

Organizational Performance Measures

Destination/Market Performance
Bermuda Tourism Key Performance Indicators

- Total visitor air arrivals - vacation and groups
- Hotel Occupancy
- Hotel Average Daily Rate/Revenue Per Available Room
- Airline Capacity & Load Factors
- Average Length of Stay
- Visitor Spending
- Visitor Satisfaction
- Jobs
- Tourism Tax Revenue
- Contribution to GDP
Measuring Destination/Market Performance

- Visitor arrival data tracks Air visitor arrivals – who, where, when, for how long?
- Air and Cruise Exit surveys track –
  - Visitor expenditure
  - Visitor satisfaction
  - Use and satisfaction with Visitor Information Services
- Hotel data from STR tracks ADR, RevPAR and occupancy
- Hotel data from hotel partners tracks pace (estimated future performance)
- Collect data from Airport operations and airline partners on air capacity and load factors
- Department of Statistics Tourism Satellite Account report (annual) – jobs, tax revenue, contribution to GDP
Vacation Visitor Arrivals – Jan-Sept 2015

<table>
<thead>
<tr>
<th>Arrivals</th>
<th>YTD 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air - Vacation</td>
<td>116,700</td>
</tr>
<tr>
<td>Cruise</td>
<td>329,100</td>
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<tr>
<td>Yacht</td>
<td>2,656</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>448,456</strong></td>
</tr>
</tbody>
</table>
Visitor Arrivals – Country of Origin (Jan-Sept 2015)

**Cruise Visitors Year To Date**
- USA: 88%
- Canada: 5%
- UK: 2%
- Rest of World: 5%

**Air Vacation Visitors Year To Date**
- USA: 79%
- Canada: 10%
- UK: 7%
- Rest of World: 4%
Air Visitor Arrival Statistics (Jan-Sept 2015)

### Arrivals by Type

<table>
<thead>
<tr>
<th>Type</th>
<th>YTD 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Vacation</strong></td>
<td>116,700</td>
</tr>
<tr>
<td>Vacation</td>
<td>113,321</td>
</tr>
<tr>
<td>Destination Wedding*</td>
<td>3,131</td>
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<tr>
<td>America's Cup Vacation*</td>
<td>248</td>
</tr>
<tr>
<td><strong>Business</strong></td>
<td>33,361</td>
</tr>
<tr>
<td>Business</td>
<td>26,461</td>
</tr>
<tr>
<td>America's Cup Business*</td>
<td>273</td>
</tr>
<tr>
<td>Incentive Groups*</td>
<td>279</td>
</tr>
<tr>
<td>Conference/Meeting*</td>
<td>6,348</td>
</tr>
<tr>
<td><strong>Visiting Friends &amp; Relatives</strong></td>
<td>24,540</td>
</tr>
<tr>
<td>Vacation*</td>
<td>22,345</td>
</tr>
<tr>
<td>Personal *</td>
<td>2,195</td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td>2,820</td>
</tr>
<tr>
<td>Study</td>
<td>609</td>
</tr>
<tr>
<td>Other</td>
<td>2,211</td>
</tr>
<tr>
<td><strong>Total Air Visitors</strong></td>
<td><strong>177,421</strong></td>
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</table>
Air Visitor Expenditure

<table>
<thead>
<tr>
<th>Service</th>
<th>YTD 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation Visitors</td>
<td>$1,291.36</td>
</tr>
<tr>
<td>Business Visitors</td>
<td>$1,232.87</td>
</tr>
<tr>
<td>Total Average</td>
<td>$1,188</td>
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</tbody>
</table>

### Average Spending per person

<table>
<thead>
<tr>
<th>Category</th>
<th>Spending</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accomodations</td>
<td>$574.60</td>
</tr>
<tr>
<td>Restaurant meals/bev</td>
<td>$295.57</td>
</tr>
<tr>
<td>Groceries/liquor</td>
<td>$62.09</td>
</tr>
<tr>
<td>Gifts/souvenirs</td>
<td>$65.30</td>
</tr>
<tr>
<td>Recreational/Leisure</td>
<td>$84.97</td>
</tr>
<tr>
<td>Transportation</td>
<td>$67.95</td>
</tr>
<tr>
<td>Telecommunications</td>
<td>$5.51</td>
</tr>
<tr>
<td>Other shopping</td>
<td>$32.46</td>
</tr>
</tbody>
</table>
We’d love to hear from you!

Tell us about your experience by participating in our online research panel.

Bermuda Visitor Panel
Recent Topics

- Transportation – taxis, buses, ferries
- Public Beaches
- Nightlife/Entertainment
- National Service Standards
- Rental Cars
- Golf
Air Visitors to Bermuda - Did you know?

• The ‘Hospitality of People’ was the most important factor among leisure visitors in 2014

• The Royal Naval Dockyard is the major Key attraction with 50% of guest going to Dockyard

• Visiting the Beach is the major leisure activity with 78% of arrivals partaking in this type of activity

• Only 12% of Air visitors stated they went to a Bar or Nightclub
Exit Surveys

• Exit surveys are conducted amongst both Air and Cruise visitors
• The surveys provide a granular analysis of visitors to the island at specific periods of time throughout the year: Summer, Winter and the full year
• Exit interview questionnaires are customized to air and cruise
• The questionnaires are flexible which allows for the gathering of new information. For example the 2015 questionnaire includes questions specific to Bermuda cuisine and mobile device usage.
Exit Interviews - Objectives

Some of the objectives of these Exit Interviews include:

• *Determine the composition of visitors to the Island during the year;*

• *Assess visitors’ expenditure patterns while on the Island;*

• *Evaluate visitors’ activity patterns while in Bermuda;*

• *Assess visitors’ level of satisfaction with Bermuda as a vacation destination;*  
  *and*

• *Determine the likelihood of repeat visitation and propensity to recommend Bermuda to others as a vacation destination*
Exit Interviews - Methodology

• A sample of air visitors surveyed and weighted according to purpose of visit, country of origin and age. Cruise visitors are also surveyed in proportional numbers by cruise line and ship.

• This ensures the responses are reflective of the actual visitors that come to Bermuda.

• Where possible, results are compared to those from the previous years to identify trends.
Exit Surveys – What are they used for?

• Visitor Spending estimates; total and per person – *Used to track economic impact of tourism*
• Visitor Satisfaction – *Used to measure service and assist in product development strategy*
• Attraction Visitation – *Used to enhance existing products, develop new products and determine transportation needs*
• Transportation analysis – *Used to measure satisfaction and gather data for infrastructure strategies*
• Booking trends – *Assist in refining marketing strategy*
• Advertising recall - *Assist in refining marketing strategy*
• Gotobermuda.com and other website usage
Exit Survey – Deliverables

The Exit survey results are provided in a few different forms:

• Newsletter – High level analysis of major impacts in a visually appealing way. This newsletter is a highly condensed version of the full report.

• Reports – We receive detailed reports with analysis on each question, providing year over year comparisons in addition to recommendations.
Exit Survey – Trending

One of the major benefits of the exit interviews is that it provides trending going back more than 10 years. The graph below is an example of one such trend, satisfaction with the visit:

Being able to track the trending of attributes allows the BTA to gauge its success in certain areas.

Having the trending allows us to have a benchmark and quantify the improvement in the visitor experience.
A gap analysis provides an estimate of the proportion of visitors who considers a factor to be critically important, but who are not completely satisfied with the performance of the destination visited with regard to each specific factor evaluated. It is meant to display which factors should be focused on to best increase total satisfaction.

The higher the percentage, the larger the gap in meeting the visitors’ needs.
Air Exit Surveys 2014 – Party Composition

Leisure Travel Party Size

Composition of Leisure Travel Party

- By self
- As a couple
- Family/As a family with children
- With friends/As a couple with friends
Air Exit Surveys 2014 – Previous Visitation

- Never visited before/First trip
- Within past year
- One to less than three years
- Three to less than five years
- Five years or more

Repeat = 57%
First Time = 43%
Air Exit Surveys 2014 – Key Factors in Choosing Bermuda

Proximity of location: 33%
Previous experience: 32%
Climate/Weather: 27%
Visiting friends/family: 21%
Beauty of the Island: 18%
Hospitality/Friendly people: 9%
Air Exit Surveys 2014 – Participation in Leisure Activities

![Graph showing participation in leisure activities over years with data points for visit beach, shopping, swimming, snorkeling, spa visit, and bus or taxi tour of the Island.](image-url)
Air Exit Surveys 2014 – Key Attractions Visited
Air Exit Surveys 2014 - Satisfaction

- Completely satisfied
  - 2003: 78%
  - 2004: 76%
  - 2005: 76%
  - 2006: 77%
  - 2007: 75%
  - 2008: 75%
  - 2009: 77%
  - 2010: 73%
  - 2011: 76%
  - 2012: 79%
  - 2013: 82%
  - 2014: 82%

- Mostly satisfied
  - 2003: 20%
  - 2004: 22%
  - 2005: 23%
  - 2006: 22%
  - 2007: 24%
  - 2008: 22%
  - 2009: 21%
  - 2010: 24%
  - 2011: 23%
  - 2012: 20%
  - 2013: 18%
  - 2014: 18%
Air Exit Surveys 2014 – Satisfaction with Key Attributes

- Hospitality of the people: 90%
- Natural scenic environment: 87%
- Personal safety: 86%
- Seclusion/Relaxation factor: 82%

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Air Exit Surveys 2014 – Exceeding Expectations

[Graph showing the percentage of satisfaction for various aspects over the years]
Air Exit Surveys 2014 – Value

- Well above expectations
- Above expectations
- As expected
- Below expectations

Yearly percentages for 2003 to 2014.
Air Exit Surveys 2014 – Booking Trends
Air Exit Surveys 2014 – Accommodation Satisfaction

Air Exit Surveys 2014 – Modes of Transportation

- Taxi service
- Bus service
- Ferry service
- Motor scooter rental*
Air Exit Surveys 2014 – Satisfaction with Transportation
Research in the Travel Cycle

Dream → Share → Research → Experience → Book
Awareness & Perceptions

- More than one in ten US adults have vacationed in Bermuda.
- Among those who have never vacationed in Bermuda, four in ten are at least somewhat familiar.
- Those who have not visited Bermuda are more likely to consider it similar to Jamaica.
- Past visitors consider Bermuda similar to the Bahamas, Virgin Islands, and Cayman.
- One in ten US adults are interested in visiting within the next two years.
Habits

Sources most used to obtain info about travel (amongst those interested in visiting Bda):
• Online travel agency (OTA) websites (44%)
• Referrals from friends/family (27%)
• Online articles (27%)

Those interested in visiting Bermuda are also interested in visiting:
• The Caribbean
• Australia
• Las Vegas
• The Florida Keys
• Honolulu / Hawaii
Online Searches & Bookings for Hotels

3rd party online searches and bookings for hotels are monitored to identify trends such as:

• Which cities/markets are looking at and booking Bermuda?
• What types of consumers (personas)?
• What is the average booking window?
• How are we comparing to competitors – are we getting our fair share?
### Searches for Hotels

<table>
<thead>
<tr>
<th>Rank</th>
<th>City</th>
<th>2015 YTD</th>
<th>% of share</th>
<th>Chg YOY</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1</td>
<td>New York</td>
<td></td>
<td></td>
<td>+60%</td>
</tr>
<tr>
<td>#2</td>
<td>Boston</td>
<td></td>
<td></td>
<td>+124%</td>
</tr>
<tr>
<td>#3</td>
<td>Washington DC</td>
<td></td>
<td></td>
<td>+118%</td>
</tr>
<tr>
<td>#4</td>
<td>Philadelphia</td>
<td></td>
<td></td>
<td>+129%</td>
</tr>
<tr>
<td>#5</td>
<td>Atlanta</td>
<td></td>
<td></td>
<td>+130%</td>
</tr>
<tr>
<td>#6</td>
<td>Chicago</td>
<td></td>
<td></td>
<td>+87%</td>
</tr>
<tr>
<td>#7</td>
<td>San Jose, CA</td>
<td></td>
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<td>+102%</td>
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<tr>
<td>#8</td>
<td>Bridgeport/Stamford, CT</td>
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<td></td>
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<tr>
<td>#9</td>
<td>Los Angeles</td>
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<tr>
<td>#10</td>
<td>Baltimore</td>
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<td>+41%</td>
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<tr>
<td>#11</td>
<td>San Francisco, CA</td>
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<td>+54%</td>
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<td>#12</td>
<td>Hartford, CT</td>
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<td>+92%</td>
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<tr>
<td>#13</td>
<td>Toronto</td>
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<tr>
<td>#14</td>
<td>Pittsburgh</td>
<td></td>
<td></td>
<td>+137%</td>
</tr>
<tr>
<td>#15</td>
<td>Providence, RI</td>
<td></td>
<td></td>
<td>+33%</td>
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</table>

### Bookings for Hotels

<table>
<thead>
<tr>
<th>Rank</th>
<th>City</th>
<th>2015 YTD</th>
<th>% of share</th>
<th>Chg YOY</th>
</tr>
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<tbody>
<tr>
<td>#1</td>
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<td>+3%</td>
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<td>#2</td>
<td>Boston</td>
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<tr>
<td>#3</td>
<td>Washington DC</td>
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<td>+5%</td>
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<td>#4</td>
<td>Philadelphia</td>
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<td>+7%</td>
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<tr>
<td>#5</td>
<td>Toronto</td>
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<td>#6</td>
<td>Bridgeport/Stamford, CT</td>
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<td>-4%</td>
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<tr>
<td>#7</td>
<td>Chicago</td>
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<td>-3%</td>
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<td>#8</td>
<td>Los Angeles</td>
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<td>-24%</td>
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<td>#9</td>
<td>San Francisco</td>
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<td>#10</td>
<td>Baltimore</td>
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<tr>
<td>#12</td>
<td>Atlanta</td>
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<td></td>
<td>+5%</td>
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<tr>
<td>#13</td>
<td>Hartford, CT</td>
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<td>+15%</td>
</tr>
<tr>
<td>#14</td>
<td>Dallas, TX</td>
<td></td>
<td></td>
<td>-8%</td>
</tr>
<tr>
<td>#15</td>
<td>Miami</td>
<td></td>
<td></td>
<td>+2%</td>
</tr>
</tbody>
</table>
Average Lead Time for US

Average Lead Time

- **Search to Book**: 5.57 days
- **Book to Stay**: 45.13 days

50.70 days vs 57.48 days in October 2014

Up from 47.01 days in September
Bermuda’s Target Personas

**Experience Seekers**
- 36-50 years old
- Double income, no kids
- HHI $200K+, high disposable income
- 6+ trips per year
- Immersive travel experiences
- Looks at reviews and recommendations from experts and friends
- Desired experience: Leisure, Culture, me time

**Go For It Families**
- 36-50 years old
- HHI @ $200k +
- Kids are older and can engage at the parents’ level
- Mom makes decisions
- 7+ trips per year, 2 vacations / 5 getaways
- Lots of travel centered on activities
- Unique experiences, higher end, creating memories matters most
- Desired experience: Leisure, culture, adventure, excitement
Bermuda’s Target Personas

**Dream Tripper**
- 51-65 years old
- HHI @ $150k +
- Couples traveling together, sometimes with friends
- Lots of planning, includes tours/packages
- 8+ trips per year, 2 vacations / 6 getaways including visiting family
- Not highly engaged in social media, loyal to associations
- Desired experience: leisure, culture, storytelling

**Adventure Seekers**
- 25-35 years old
- Moving up in their career
- No family or very young family
- HHI @ 100K+
- Millennials with disposable income
- 6+ trips per year, 2-3 trips around authentic experiences
- Active on social media, spends time and money on interests
- Desired experience: Culture, adventure, motivation
Personas Booked Hotels to Bermuda Nov-April

- **Bucket Listers**: 20% (Change YOY: +33%)
- **Adventure Seekers**: 17% (Change YOY: +28%)
- **Dream Trippers**: 15% (Change YOY: +27%)
- **Experience Seekers**: 13% (Change YOY: +26%)
- **Go For It Families**: 8% (Change YOY: +23%)
- **Frugal Boomers**: 6% (Change YOY: +18%)
- **Self Seekers**: 6% (Change YOY: +15%)
- **Young Free Spirits**: 6% (Change YOY: +13%)
- **Visiting Family**: 5% (Change YOY: +15%)
- **Couponing Families**: 4% (Change YOY: +19%)

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