



**BERMUDA**  
— AGILITY —

*National*  
**Tourism Plan**  
— 2019-2026 —

# National Tourism Plan: *Goals & Objectives*

## Objectives

Create a six year tourism plan to **2026**

Build a clear view of our aspirational  
future for tourism and its effect  
on the island as a whole

## Vision

Bermuda will have a growing and balanced tourism sector. This means we will grow tourism, and at the same time ensure:

- ▶ Better balanced seasonality
- ▶ Better balanced price-value perceptions
- ▶ Better balanced visitor volume – air vs. cruise
- ▶ Better balanced benefits for all residents of Bermuda

## Mission

The National Tourism Plan (NTP) will enable, or be the catalyst for, changes that boost the tourism sector. To do this, the NTP will:

- ▶ Work with all relevant stakeholders to ensure their voices are heard
  - ▶ Focus on the things that matter
  - ▶ Help bring about change in a sustainable way
- ▶ Help foster cooperation vs. competition island-wide
  - ▶ Be visitor-centric in our approach



# U.S. Visitor Targets



*Savvy*  
**ITY**  
 WELER  
**ESCAPE** *Indulgent* *Experience* *Educated*  
 ENTHUSIAST **CITY**  
 DWELLER  
*Indulgent* **ESCAPE** *culturöd*

WHO ARE THEY?

• 24-44 • HH \$100K+ • COUPLES • 6+ TRIPS/YEAR



TECHIE *EDGY* **AMBITIOUS**  
*DCY* **ADVENTURE** *EDGY*  
**SEEKER** *TECHI*  
 DIVERSE *Stylish*  
**URBANITES** **FIT**

WHO ARE THEY?

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

## Must Win

### EXPERIENCE ENTHUSIAST & ADVENTURE SEEKER

- We are currently attracting more of these groups; product can meet their needs year-round
- They are in pre-family stage; could represent future Active Family travel
- These segments are main focus for marketing and development purposes
- Mini segments: African Americans, Babymooners

## Bermuda is an alluring destination that attracts many people – but we can't appeal to everyone.

We need to focus our resources on particular targets or segments. These segments\* were chosen based on a number of factors, including segment size, spending and projected growth in the next six years; current visitors to Bermuda; suitability of our offering and other factors. Focusing on these targets means that we should concentrate our resources and efforts – be they marketing, product development, hospitality services or experiences – on these segments. This doesn't mean we forget about other groups; rather, we choose to focus on these four segments as they represent the biggest potential for Bermuda's tourism growth.



badge-worthy experiences prestigious  
 experiences **JETSETTER** *Luxury*  
*Luxury* badge-worthy *Exclusive*  
 experiences prestig

WHO ARE THEY?  
 • 30+ • HH \$250K+ • 6+ TRIPS/YEAR



ORGANIZED SPORTY ORGANIZED  
 Active **ACTIVE** Bonding  
**FAMILIES**  
 URBAN SUBURBANITES SPORTY ORGANIZED

WHO ARE THEY?  
 • 35-54 • HH \$160K+ • CHILDREN UNDER 18 • 6-7 TRIPS/YEAR

## Must Have

### JETSETTER

- Important part of current visitor arrivals – high spenders
- Most resistant to economic downturns
- Product exists but needs to be improved to truly appeal to this audience
- Mini segments: Yachting, Destination Weddings

## Invest in the Future

### ACTIVE FAMILIES

- Most Active Families are millennials so this group is likely to grow in the next five years
- Our product is not where it should be today; we need to consider how to develop products and services to better meet the needs of this segment

\*Segments differ in the U.K. and Canada.

# Visitor Need States

**To succeed in a more competitive and fast-moving world,  
we need to think like a visitor.**

We conducted research among more than 2,000 people across the U.S., Canada and the U.K. to understand why, where and how they travel for leisure. We found that while there are some differences between short (4 nights or less) and long vacations, people tend to take vacations for four major reasons – or “need states.” These need states may vary by segment and/or by the time of year. By understanding these need states in more detail, we can develop more relevant and appealing products, services, packages and marketing messages.

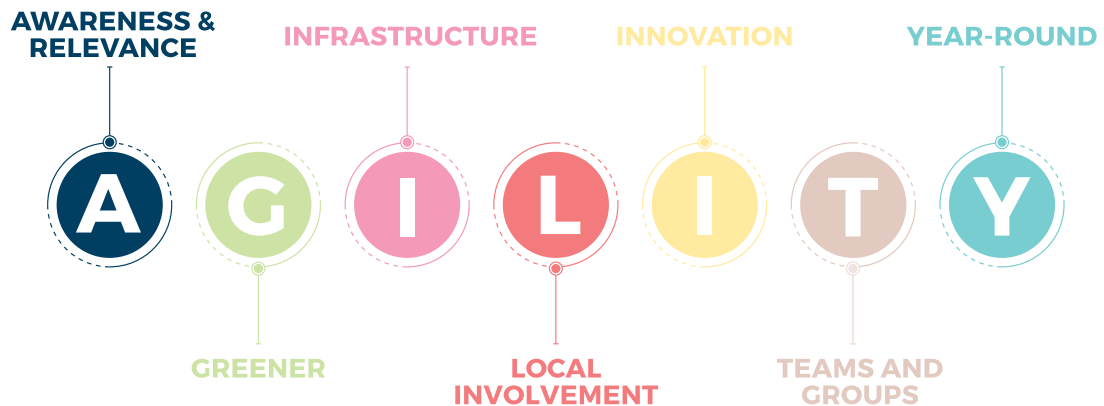
	<i>Getaway</i>	<i>Family Fun &amp; Bonding</i>	<i>Adult/Couples Retreat</i>	<i>Seeking Experiences</i>
<b>Most important needs</b>	<ul style="list-style-type: none"> <li>Re-energise</li> <li>Relieve stress</li> <li>Break up the routine</li> <li>Get away from it all</li> </ul>	<ul style="list-style-type: none"> <li>Travel with family</li> <li>Visit friends/family</li> <li>Create memories</li> <li>Outdoor experiences</li> </ul>	<ul style="list-style-type: none"> <li>Better weather</li> <li>Romantic getaway</li> <li>Revisit a destination</li> <li>Travel deals</li> </ul>	<ul style="list-style-type: none"> <li>New places/adventures</li> <li>Broaden horizons</li> <li>Different cultures</li> <li>Historic locations</li> </ul>
<b>How Bermuda delivers on those needs</b>	<ul style="list-style-type: none"> <li>Experience a different world without going far.</li> <li>Relax and unwind any way you want.</li> </ul>	<ul style="list-style-type: none"> <li>Unique activities for all ages, on land and water.</li> <li>A safe, family-friendly place to make memories.</li> </ul>	<ul style="list-style-type: none"> <li>An intimate escape where anything can happen. A place made for unforgettable moments.</li> </ul>	<ul style="list-style-type: none"> <li>A trip full of culture and adventure. A rich and diverse history offers unique, memorable experiences.</li> </ul>
<b>Segments most appealed to</b>	<ul style="list-style-type: none"> <li>Jetsetters</li> <li>Experience Enthusiasts</li> </ul>	<ul style="list-style-type: none"> <li>Active Families</li> <li>Jetsetters</li> </ul>	<ul style="list-style-type: none"> <li>Experience Enthusiasts</li> <li>Jetsetters</li> <li>Active Families (weekend without kids)</li> </ul>	<ul style="list-style-type: none"> <li>Experience Enthusiasts</li> <li>Adventure Seekers</li> <li>Jetsetters</li> <li>Active Families</li> </ul>

# Roadmap *for Success*

**The history of Bermuda is one of constant innovation and change.**

From farming to shipbuilding to military bases to tourism to financial services, Bermuda has shown an uncanny ability to adapt with the times. Change is inherent in the DNA of our country. The concept of AGILITY can harness this energy and guide us to collectively focus our efforts.

## The Seven Pillars of the National Tourism Plan



In a world where change is happening faster than ever, and where standing still effectively means moving backwards, we need to draw on this ability to change in order to grow as an appealing destination. It is this agility that will enable us to differentiate ourselves from other destinations, offer relevant products and services and create new, distinctly Bermudian experiences.

Our National Tourism Plan depends on our agility and highlights the need to change in

almost every aspect of how we attract, service and delight our visitors. We've therefore based our seven core pillars around the notion of AGILITY. Each pillar deals with a specific aspect of tourism that needs to evolve. In some cases, the change is small; in others it requires a dramatic shift. Some stakeholders may find themselves focusing on one pillar; many will need to address some aspect of all seven. Whatever your focus, it is critical to examine the strategies and tactics to understand your role in effecting the change we need to succeed.

THE ABILITY TO *transform ourselves* SPEAKS TO OUR CREATIVITY, PASSION AND, PERHAPS MOST IMPORTANTLY, *our agility*.

# A

# Awareness & Relevance

*Inspiring people with the allure of Bermuda*

While many people have heard of Bermuda, relatively few know what makes us original so they choose to go elsewhere. We must focus our resources to make the right audiences more familiar with Bermuda and break through the 'noise' of other destinations.



## *The Opportunity:*

By 2026, Bermuda will be seen by our target visitors as an alluring destination set apart not only by our geographic location but also our way of life. **How will we measure our success?**

- ▶ Increase familiarity among our target visitors
- ▶ Improved perceptions; prospective visitors should see Bermuda as:
  - A year-round destination tied to its attitude rather than merely its assets
  - An island set apart by its location and way of life
  - A destination that is full of adventure and mystique

## *How will we effect change?*

**What we will do:**

- ▶ **Further integrate our communications efforts as much as possible**
- ▶ **Focus on reaching the right traveller (from our target cities) at the right time with the right messages** – and so establish an emotional connection between our target visitors and Bermuda

- ▶ **Use communications as a tool to balance seasonality** by developing programs/offers for the right target + need state + season to boost year-round travel
- ▶ **Look to new technologies** that leverage data and insights to enhance our marketing efforts and visitor experiences
- ▶ **Enable industry partners** with enhanced digital tools and training to create a larger digital footprint for Bermuda

## **What we won't do:**

- ▶ Spend resources on consumers and in cities not within our target scope
- ▶ Spend resources on messages that are off-brand

## *Questions to answer*

- ▶ Am I focusing on the right target audiences and their key need states?
- ▶ How can I spread the word about Bermuda through social (or other) media?
- ▶ What do my messages convey about Bermuda?



# Greener

## *Growing by being Pink, Blue and Greener*

Paying attention to our environment is not only good for Bermuda in general, it is good for business. Eco-tourism is a fast-growing trend and our clean ocean and beaches and healthy reef provide important draws for visitors. However, we can do better – and become greener.



### ***The Opportunity:***

By 2026, Bermuda will be on the road to becoming one of the 'greenest' tourist destinations, and will attract visitors who value this through more eco-friendly practices and better use of its natural resources.

### ***How will we measure our success?***

- ▶ Bermuda should be perceived by its target segments as being:
  - An eco-friendly destination to visit
  - Clean and pollution/litter-free
- ▶ Visitor-related transportation (e.g. taxis, rental cars, buses, etc.) will gradually switch to greener alternatives

### ***How will we effect change?***

#### **What we will do:**

- ▶ **Electric vehicles** – consider how to promote the use of electric vehicles as visitor transportation
- ▶ **Promote our unique natural assets** – notably, the Railway Trail, our ocean resources and natural parks/beaches
- ▶ **Beach economy** – add sustainability to the goals of the beach economy

- ▶ **Greener hospitality** – the hospitality industry should explore ways to reduce waste and its carbon footprint and, at the same time, reduce costs
- ▶ **Promote sustainable activities** on and in our oceans, such as scuba, fishing, etc.
- ▶ **Work with environmental groups** to enhance environmental practices and new ideas

#### **What we won't do:**

- ▶ Disrupt environmentally sensitive areas on land and offshore or engage in any activity that has negative impact on our reef
- ▶ Initiate activities that lead to overcrowding of beaches
- ▶ Support businesses and regulation that are detrimental to the environment

### ***Questions to answer***

- ▶ How can I make my business or organisation greener?
- ▶ In what ways can we, as a country, better utilise and promote our amazing natural assets to visitors in a sustainable way?
- ▶ What activities should we stop/curtail that are detrimental to our environment?





# Infrastructure

## *Building frictionless experiences from arrival to departure*

A healthy tourism industry relies on a solid infrastructure to enable us to deliver our distinct experiences to our visitors. While our infrastructure is generally good, there are important ways it needs to be upgraded, most notably in transportation, the waterfront (Hamilton, St. George), utility costs, technology, shopping/retail and accessibility for disabled visitors and residents. In addition, the myriad laws and regulations governing our industry should be simplified and updated.



### ***The Opportunity:***

By 2026, Bermuda will offer frictionless experiences from arrival through departure in a way that not only satisfies visitors but adds to their positive experience of our country.

### ***How will we measure our success?***

Visitor satisfaction with elements such as:

- ▶ Quality of transportation
- ▶ Airport experience
- ▶ Accessibility
- ▶ Shopping

### ***How will we effect change?***

#### **What we will do:**

- ▶ **Arrival/departure experience** – develop a frictionless experience at the new airport
- ▶ **Transportation** – offerings need to be more visitor-friendly and technologically relevant while providing viable alternatives and creating new opportunities for all stakeholders
- ▶ **Accessibility** – ease of use for disabled/mobility-impaired visitors and residents must be improved, especially for cruise passengers

- ▶ **The waterfronts** – Hamilton and St. George are significantly underutilised. A new plan should be developed to revitalise these waterfronts.
- ▶ **Tourism-related regulations** – many are out of date and can be needlessly onerous; these laws should be simplified and modernised
- ▶ **Vacation rentals** – owners should organise to develop self-regulation with regard to minimum standards offered to visitors

#### **What we won't do:**

- ▶ Our improvements will not change the distinct atmosphere and nature of the Bermuda experience that draws visitors
- ▶ Increase traffic and inconvenience Bermuda residents
- ▶ Compromise on safety and our reputation as a safe, clean destination

### ***Questions to answer***

- ▶ How can I offer visitors a more 'frictionless' experience on island?
- ▶ How can I make my organisation more accessible to disabled travellers?
- ▶ How can we, as an industry, work together with government to enhance our infrastructure?

L

# Local Involvement

## *Growing through Our People*

Tourism in Bermuda can only grow through and with the support of its residents. Visitors to the island cite interactions with locals as one of the best parts of their trip. Yet many young Bermudians currently don't see tourism as an appealing career. And many locals do not yet view tourism as vital to our economy. As the largest private sector employer in Bermuda, and a proven growth engine, we need to change these perceptions and engage all residents in the tourism industry.



### *The Opportunity:*

By 2026, Bermuda will effectively tap the vast creative and entrepreneurial potential and hospitality of its local residents so that both visitors and residents benefit from these interactions.

### *How will we measure our success?*

- ▶ Visitors should be satisfied with their interactions with locals
- ▶ Bermuda residents should see tourism as an attractive career and as an important part of the future of Bermuda's growth

### *How will we effect change?*

#### **What we will do:**

- ▶ **Demonstrate how tourism** can be a multi-faceted career by, among other things, making it relevant to school-aged children
- ▶ **Align around service standards** – employees in tourism and related industries should feel aligned with the goal of increasing tourism via offering exceptional service

- ▶ **Tapping the hospitality of Bermudians** – seek more ways for locals to interact with visitors; prepare and encourage locals to be tourism ambassadors
- ▶ **Community outreach** – it is imperative that all parts of the community believe in the importance of tourism and its ability to effect positive change for all residents

#### **What we won't do:**

- ▶ Portray tourism as limited in terms of career prospects
- ▶ Ignore the voices of our communities when it comes to tourism development

### *Questions to answer*

- ▶ How can I encourage young Bermudians to consider tourism as an appealing career?
- ▶ How can I encourage more interactions between visitors and locals?
- ▶ How do I enhance service standards in my organisation (e.g. via CTA or NSSP designation)?



# Innovation

## *Thinking like a visitor*

The world of travel is shifting quickly and it's critical that we keep up with new developments in travel and tourism, and meet the evolving needs of our target visitors. This means that we need to promote an entrepreneurial culture, utilise technology and data in new ways and, perhaps most importantly, 'think like a visitor' as we develop new products, services and experiences.



### ***The Opportunity:***

The Bermuda Tourism Industry will have a **visitor-centric** approach and will utilise technology and data to enhance visitor experiences.

### ***How will we measure our success?***

- ▶ **Visitors should** agree that packages, experiences and products/services are designed around their needs
- ▶ **Non-visitors should** believe that there is "a lot to do for people like me in Bermuda"

### ***How will we effect change?***

#### **What we will do:**

- ▶ **Think like a visitor** - encourage demand-side thinking via training and dissemination of information around our target audiences, their need states and what they are looking for in Bermuda
- ▶ **Set up an incubator** to help local entrepreneurs establish their businesses
- ▶ **Introduce a central portal** for all activities and events
- ▶ **Make better use of data on our visitors** - ideally we capture visitor data ahead of their

arrival so we can suggest activities or experiences based on their needs

- ▶ **Drive investment in specific areas** that fulfill target + need state + season combinations. Special attention will be paid to investing in experiences (e.g. Cultural Tourism) that meet the need states of our target audiences and that generate a strong return on investment
- ▶ **Development of African Diaspora Heritage Experience (ADHE)** - work should be done to enhance the African Diaspora Heritage Trail into a culturally rich and memorable experience

#### **What we won't do:**

- ▶ Focus on supply-side thinking - we must think like a visitor!
- ▶ Consider technology for technology's sake - it should always improve the visitor's experience
- ▶ Invest in speculative technology in areas where proven solutions already have traction

### ***Questions to answer***

- ▶ What unique products, services or experiences can I develop based on the need states of our target audiences?
- ▶ How can I participate in a central event portal so that my business is featured?
- ▶ How can I help Bermudian entrepreneurs develop sustainable businesses?

# T

# Teams & Groups

## *Designing distinct positioning for groups*

MICE (Meeting, Incentive, Conferences and Exhibitions), sports teams and events are an important source of visitors throughout the entire year, not only contributing economic impact to Bermuda but also Bermuda's profile. While we have excellent facilities for certain sports and meetings, we have the opportunity to offer a more seamless experience for organisers, leveraging new trends and technology to meet the expectations of participants and meeting planners.



### ***The Opportunity:***

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

### ***How will we measure our success?***

- ▶ We will grow the percentage of group business from ~25% of room nights to >30% of room nights by lifting group business in the slower months (not cannibalising current airlift)

### ***How will we effect change?***

#### **What we will do:**

- ▶ **Develop a positioning (Unique Selling Proposition) for groups**
- ▶ **Segment and identify the prime prospects for our groups business** and focus on these
- ▶ **Better coordination** – there is scope for better coordination between different organisations in the MICE market
- ▶ **Technology and production** – there is a need for increased expertise and/or competition

among technical and/or production providers to ensure availability of up-to-date inventory

- ▶ **Focus on key sports** – focus on attracting a number of sports teams/events that are ideally suited for Bermuda and work with relevant government and non-government organisations to ensure our facilities meet the needs of these sports and are regarded as world-class

- ▶ **Transport** – there is a need to improve group transport to ensure seamless mobility around the island

#### **What we won't do:**

- ▶ Go after groups or sports teams that are not a good fit for Bermuda, logistically or seasonally

### ***Questions to answer***

- ▶ How can my business enhance the experience of groups and/or sports teams?
- ▶ How can we, as an industry, work together to offer a better experience for groups that is collaborative and coordinated?





# Year-Round

## *Embracing all seasons*

Bermuda's seasonality places significant stress on the island and tourism-related businesses that have to contend with massive ebbs and flows. Cruise ships, while important to Bermuda's tourism industry, contribute to this seasonality. We also often apologise for our non-summer months but generally our weather is enjoyable year-round, especially to visitors from the northeastern U.S. and Canada.



### ***The Opportunity:***

By 2026 Bermuda will offer an attractive value proposition for visitors to come any time of year.

### ***How will we measure our success?***

More than 56 percent of our arrivals will come from the non-summer months (Sept-May); currently, they make up 52 percent.

### ***How will we effect change?***

#### **What we will do:**

- ▶ **Redefine our seasons** – everyone in the tourism industry should be working off the same calendar
- ▶ **Relevant packages should be developed** for the right audience-need state combinations depending on the season

- ▶ **Cruises** – will remain an integral part of tourism in Bermuda, but should be managed carefully to encourage quality over quantity, greater use of ports in Hamilton and St. George and an extended cruise season – ideally from April through December
- ▶ **Yachting** – promote Bermuda as a stopover port in the spring and fall for yachts and superyachts; in particular, allowing for superyacht chartering as a stimulus for small businesses
- ▶ **Event Authority** – collaborate with the new Event Authority to develop significant events for Bermuda in the non-summer months

#### **What we won't do:**

- ▶ Create new, large events in peak season
- ▶ Give cruise partners preferred access to our docks if they don't commit to using them outside summer months

### ***Questions to answer***

- ▶ How can my organisation offer products, services and experiences in the non-summer months? This could also include discounts and specials.

	FAMILY FUN & BONDING	GETAWAY	ADULTS/COUPLES RETREAT	SEEKING EXPERIENCES
<b>WARM WINTER</b> JAN, FEB, MAR	● <sup>1</sup>	●	●	● <sup>2</sup>
<b>SPRING</b> APR, MAY	○	●	●	●
<b>SUMMER</b> JUN, JUL, AUG	●	●	○	●
<b>FALL</b> SEP, OCT, NOV, DEC	○	●	●	●

1. Winter/spring break 2. Different experiences per season

● IDEAL ● POSSIBLE ○ UNLIKELY

# National Tourism Plan

## *on a page*

<b>NTP Objective:</b>	<ul style="list-style-type: none"> <li>Build a clear view of our aspirational future for tourism and its effect on the island as a whole</li> </ul>
<b>NTP Vision:</b>	<ul style="list-style-type: none"> <li>Bermuda will have a growing and balanced tourism business by 2026</li> <li>The NTP will enable, or be the catalyst for, change to boost the tourism industry</li> </ul>

### Success Indicators. By 2026...

	Who will come, and when		Attitudes toward Bermuda		Spend		Benefit to residents
<b>Bermuda will host 221K leisure air arrivals by 2026</b>	65% of our visitors will come in the non-summer (Sept-May) months. Currently 60%	8% of our leisure air arrivals will be Black visitors; currently 4%	>6% increase in our Brand Equity metrics <i>among non visitors</i> of: Aware: 66% Familiar: 34% Consider: 27%	83% Definitely recommend <i>among visitors</i> : from 76%	\$275 Spend (per person) of Cruise Ship passengers on Island	\$18M Total spend of Yachts in Bermuda from \$12M in 2022	>70% of our residents will support development of tourism in Bermuda, from 61% (composite variable)

<b>Cities</b>	<b>FOCUS:</b> New York City, Boston, Washington, DC, Philadelphia, Toronto
	<b>NURTURE:</b> Baltimore, Hartford, Atlanta, Chicago, Dallas, San Francisco

<b>Target Visitors</b>	
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### Need States

<i>Seeking Experiences</i>	<i>Adult/Couples Retreat</i>	<i>Family Fun &amp; Bonding</i>	<i>Getaway</i>
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### Strategic Pillars



**AWARENESS & RELEVANCE**  
Differentiating Bermuda



**GREENER**  
Growing By Being Pink, Blue + Greener



**INFRASTRUCTURE**  
Building Frictionless Experiences



**LOCAL INVOLVEMENT**  
Growing Through People



**INNOVATION**  
Thinking Like a Visitor



**TEAMS AND GROUPS**  
Growing Through Groups



**YEAR-ROUND**  
Embracing Seasonality





THE ABILITY TO  
*transform*  
*ourselves*

SPEAKS TO OUR CREATIVITY,  
PASSION AND, PERHAPS  
MOST IMPORTANTLY,  
*our agility.*

**BERMUDA**  
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The BTA acknowledges the contribution and time spent by hundreds of residents, business owners, government officials, non-government organisations and others in helping the creation of this plan