

# *Q1 2017 Report*

BERMUDA  
TOURISM AUTHORITY

*Research & Business  
Intelligence Division*

# *During Q1 of 2017, the Research & Business Intelligence Division accomplished the following:*

1. Launched Yacht Economic Impact and Legacy Study
2. Created feedback mechanism for National Service Standards Programme to gather data from consumers and employees online.
3. Began implementation of an attribution program to track consumers from ad exposure or interaction with social/website/search engine searches/email marketing through to arrival on island and integrate with data from landing cards. This intelligence will help determine which channels/creative are most effective and with which geographic markets and customer types.
4. Executed several online surveys on topics including:
  - a. Group site visit feedback survey
  - b. Visitor brochure request follow-up survey
  - c. Restaurant Weeks People's Choice Award
5. Launched Estimated Economic Impact Calculator project to develop an online tool which will integrate with CRM to estimate the value of events and groups to the local economy.

**In addition, the division continued to -**

1. Assist the America's Cup Economic, Environmental and Social Impact study by providing data and measurements on tourism-related areas.
2. 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.
3. 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.

# *Product & Experiences Division*

# *During Q1 of 2017, the Product & Experiences Division accomplished the following:*

## *Experience Investment*

Roll out of BTA-supported experiences continued successfully through the fourth quarter 2016, covering arts/culture as well as sport:

- Bermuda Marathon Weekend
- Restaurant Weeks
- Bermuda Performing Arts Festival
- Bermuda Triple Challenge
- Rail Trail Event
- Ariel Re Bermuda Rugby 7s
- Bermuda Regional Bridge Tournament
- Bermuda Triangle Cup
- Grey Goose World Par 3
- Bermuda Ladies Pro-Am Golf Tournament

# *Sports Tourism Strategy*

## National Sports Centre

Additional momentum and results were achieved from BTA's partnership with the National Sports Centre (NSC). For the first time, we welcomed a professional team (soccer) to train at the facility. The New York Cosmos visited for their spring training camp and an exhibition match against a Bermuda National Select team. Enquiries regarding pre-season training camps have increased and we have attracted new tournaments under the overall strategy, with high- quality first-time visitors.

Results from the BTA/National Sport Centre (NSC) partnership during the quarter included:

- a. **Ariel Re Bermuda Rugby 7s.** This group comprised a total of 220 athletes and support staff, from March 17-18, 2017. The tournament once again exceeded target visitors and was very successful, both in terms of feedback from participants and extending promotion of Bermuda as a destination for collegiate-level rugby training and competition.
- b. **New York Cosmos Soccer Team.** A total of 35 athletes and support staff, from March 16-20, 2017. In addition, BTA is leveraging the visit and relationship via an agreement with the Cosmos organization that will see Bermuda branding and signage featured at the team's home ground for the 2017 season.
- c. **Bermuda Triangle Cup.** For the second time around, this group comprised of 60 athletes and family, from April 13-16, 2017
- d. **Fairleigh Dickinson University (Lacrosse)** - A total of 22 athletes and support staff, from February 16-20, 2017

## World Triathlon Series (WTS):

Planning and work assignments for the WTS 2018 event began in earnest during the quarter. In addition to working with the Bermuda Triathlon Association and other local stakeholders on planning and execution of the event, we confirmed Upsolut Sports as the international technical race management partner. Upsolut specializes in the development, hosting and organisation of elite and mass participation endurance sport events. Upsolut is also a partner of the ITU (International Triathlon Union) and manages the ITU World Triathlon Series.

## America's Cup:

**Local Business Engagement/Celebration Zones** - we provided input and BTA representation to the ACBDA's Local Business Opportunity Committee throughout the quarter. The Committee was established to develop and promote opportunities around AC to local entrepreneurs and businesses. As part of this commitment, the BTA will host three Celebration Zone events in Hamilton (8th and 22nd June) and St. George's (14th June) - street festivals celebrating local culture with Bermuda-inspired merchandise, food and live entertainment. Each event will provide participating local vendors with sales opportunities when the AC Village is closed.

**Superyachts** - work to design curated experiences specifically for the super yacht visitors anticipated during AC also took place. Discussions with BWA (the super yacht concierge company for AC) to refine the experiences, which primarily promote authentic Bermuda-inspired offerings, provided key input to finalize content.

## Golf:

The Grey Goose World Par 3 Golf Tournament and the 20th Bermuda Ladies Pro-Am Golf Tournament were both successful events. The Grey Goose World Par 3 brought a total of 100 visitors, including 76 competitors, from Canada, USA, Great Britain, Ireland, Wales, Spain, Germany and Sweden, making it a truly global event. The Ladies Pro-Am Golf Tournament marked its 20th anniversary, bringing approximately 50 players and first-time visitors, including LPGA golf professionals and lady amateurs. Both events introduced format changes in an effort to enhance the overall experience from the standpoint of tournament play, and social elements reflecting local culture and entertainment.

## Sailing:

**Tabor Sailing Training Camp** – In conjunction with the Royal Hamilton Amateur Dinghy Club, Bermuda piloted its first sailing training camp under BTA's sports tourism strategy. It was a successful event, with a total of 17 athletes and coaches. The Dingy Club is looking to expand the programme and attract schools from across the US East Coast region.

## Golf

The 64th Goodwill Golf Tournament and Gosling's Invitational tournament were both successful events in December. The Goodwill Tournament attracted 20 teams, a total of 80 players. The Goslings Invitational welcomed 45 participants. Both events introduced format changes in an effort to enhance the overall experience from the standpoint of tournament play and social elements reflecting local culture and entertainment.

### **Nike PGA of Canada**

For the second year running, the Nike PGA of Canada was a successful event in October. In 2016, there was an 8% increase in room nights compared to 2015. A total of 412 room nights in 2016 and 320 room nights in 2015. Additionally, there was a 29% increase (\$990k vs \$770K) in visitor spending and a 23% increase (270 vs 220) in number of visitors.

### **PGA Club Professional Championship of Canada**

For the first time, Bermuda was host to the PGA Club Professional Championship of Canada in November. This was a successful event, which brought in more than 100 golf professionals and over 500 room nights.

## *Cultural & Leisure Highlights*

**Restaurant Weeks 2017** – This year’s event featured 50 participating restaurants offering special prix fixe menus, the largest number since inception. The introduction of new lunch menu offerings helped attract new participants and broadened the range of restaurants featured. Focused on elevating and promoting Bermuda’s food culture, we also saw additional restaurants featuring Bermuda-inspired dishes on their menus. Overall, nearly half of the participating restaurants surveyed reported increased traffic and sales; almost all participants indicated they would keep a Bermuda-inspired dish on their menu.

**Rail Trail Event** – On March 5, the BTA hosted its first “Rediscover the Rail Trail” event which focused on reimagining the trail as a tourism asset for entrepreneurs and adventure seekers. With a range of health and wellness activities taking place at Shelly Bay and on the trails, visitors - including a group of invited adventure travel planners from overseas - and locals participated in this ultimate trail experience. The event generated over 200 registered participants, and demonstrated how re-purposing an underutilized asset can create new business opportunities and offerings that people can experience year-round.

**Bermuda Festival of the Performing Arts** – The Festival attracted 250 visitors to see world-class performances during the period. The event supports BTA’s strategic objective to position Bermuda as an arts and culture destination from November – April. .

## *Cruise Strategy*

**Cruise Line Engagement** – Senior leadership from the BTA attended the annual SeaTrade Cruise Global Conference to conduct meetings with key cruise line executives. Building on Royal Caribbean and Norwegian Cruise Line regular calls and renewed commitment to Bermuda, we sought to strengthen our partnerships to discuss future improvements and additional calls to Hamilton and St. George's. We also met with representatives from other brands, including Celebrity Cruises and Silversea, as well as various port authority personnel.

## *Hub 1 Developments*

**Transforming public spaces through place making** – On March 20, the P&E team attended a place making workshop at City Hall discussing how to transform public spaces into high traffic sites locals and visitors can enjoy. We followed this with a separate BTA session to determine possible applications to Bermuda's tourism hubs, with a particular focus on Hub 1 (St. George's/St. David's). We subsequently completed a place evaluation exercise in St. George's with the Corporation of St. George's and key East End stakeholders. Work on actionable recommendations is in progress to help transforming key Hub 1 locations such as Water Street, King's Square and Ordnance Island.

*Sales & Marketing Report*  
*Q1 2017*

# *Travel, Roomnights Group & PR Dashboard*

KEY METRICS	YTD 2016	YTD 2017	2017 GOAL	% OF GOAL YTD	% Δ YOY (YTD)
Total Visitor Spending Influenced by BTA	\$ 20,009,114	\$ 27,357,674	\$ 81,120,315	34%	37%
Total Room Nights Influenced by BTA	45,669	56,112	139,656	40%	23%
Total Leisure Room Nights	30,854	39,184	92,123	43%	27%
Total Group Room Nights	14,815	16,928	47,533	36%	14%
S&M Group Sales Leads	102	117	439	27%	15%
S&M Group Sales Calls	119	122	603	20%	3%
Number of Journalists Assisted	406	168	1,700	10%	-59%
*Earned Media Generated	\$3,598,850	\$3,407,710	\$23,000,000	15%	-5%
*Coverage in Top 100 Outlets	49	78	220	35%	59%
*Average Quality Coverage Score	75%	76%	71%	106%	1%
PR Impressions Generated	165,215,031	276,899,565			68%

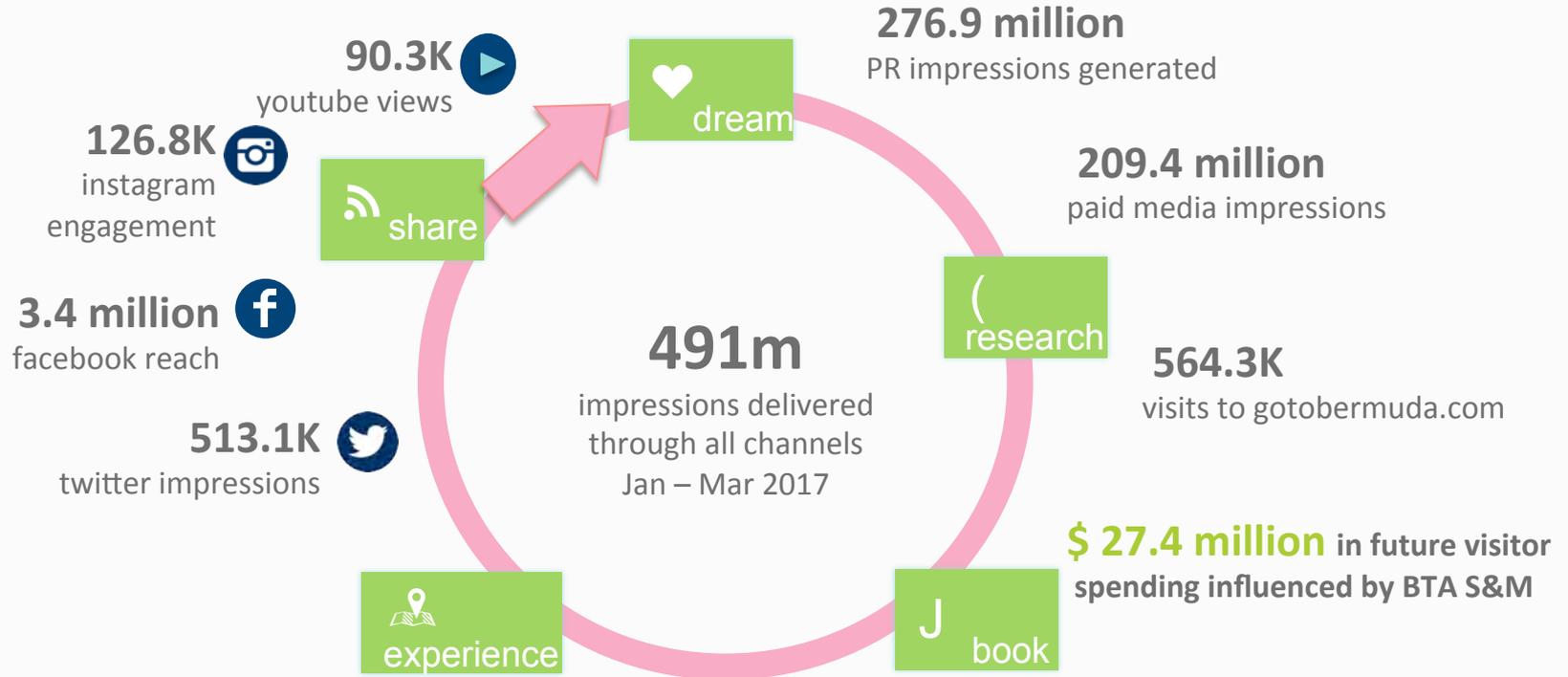
# Digital Dashboard

KEY METRICS	YTD 2016	YTD 2017	2017 GOAL	% OF GOAL YTD	% Δ YOY (YTD)
Total Website Visits	510,380	564,267	2,375,000	24%	11%
Desktop Traffic	280,298	247,798			-12%
Mobile Traffic	117,557	245,929			109%
Tablet Traffic	121,835	70,542			-42%
Website Page Views	1,022,530	1,548,876	5,500,000	28%	51%
Time on Site	2:06	2:15	2:20	97%	7%
Newsletter Subscribers	239,548	257,260	268,000	96%	7%

# Social Dashboard

KEY METRICS	YTD 2016	YTD 2017	2017 GOAL	% OF GOAL YTD	% Δ YOY (YTD)
Facebook Followers (month gained/YTD total)	241,500	334,738	380,000	88%	39%
Facebook Total Reach	2,148,050	3,417,252	15,000,000	23%	59%
Facebook Engagement	178,478	178,772	1,300,000	14%	0%
Twitter Followers (month gained/YTD total)	18,849	23,400	25,000	94%	24%
Twitter Impressions	828,520	513,079	2,300,000	22%	-38%
Twitter Engagement	19,751	17,227	90,000	19%	-13%
Instagram Followers (month gained/YTD total)	19,318	33,900	43,000	79%	75%
Instagram Engagement	44,936	126,771	450,000	28%	182%
YouTube Subscribers (month gained/YTD total)	1,401	1,654	1,700	97%	18%
YouTube Total Views	40,253	90,283	300,000	30%	124%
YouTube Minutes Watched	81,412	102,628	450,000	23%	26%
Pinterest Followers (month gained/YTD total)	1,892	2,358	2,750	86%	25%
Pinterest Repins	853	672	3,500	19%	-21%

# 2016 YTD Marketing Snapshot



# *Sales & Event Engagement*

# *Events & Engagement*

<b>Event Name</b>	<b>Location</b>	<b>Start Date</b>	<b>End Date</b>	<b>Type</b>
Pink Sale	US, CAN, UK	01/05/17	01/24/17	Promotion
PCMA Convening Leaders	Austin TX	01/08/17	01/11/17	Group
National Soccer Coaches Association Conference	Los Angeles, CA	01/11/17	01/15/17	Group
Laurie Werner, Robb Report	Bermuda	01/12/17	01/16/17	Press Trip
AP VR 360 Shoot with Scott Mayerowitz	Bermuda	01/14/17		Press Trip
Incentive Live	Las Vegas, NV	01/18/17	01/21/17	Group
USA Today VR 360 Shoot/Nicolas Osoff	Bermuda	01/23/17	01/28/17	Press Trip
PGA Show	Orlando	01/27/17	01/29/17	Golf
International Franchise Association (ALHI Booth)	Las Vegas NV	01/29/17	02/01/17	Group
WCVB-TV Boston Video Shoot	Bermuda	01/30/17	02/03/17	Press Trip
CHTA	Nassau, Bahamas	01/31/17	02/02/17	Travel Trade
UK Travel Trade Meetings	London	02/05/17	02/11/17	Travel Trade
Land Rover Bar New Boat Launch & Team Base Opening Ceremony	Bermuda	02/06/17		Press Trip
Virtuoso Travel Week Tour	Atlanta, GA	02/09/17	02/10/17	Travel Trade

<b>Event Name</b>	<b>Location</b>	<b>Start Date</b>	<b>End Date</b>	<b>Type</b>
Airbus media - Oracle Boat Launcyh	Bermuda	02/12/17	02/14/17	Press Trip
Educational Travel Conference	St. Louis, MI	02/12/17	02/15/17	Group
Andrea Falcon - Italian Travel-daily Life - Oracle press FAM	Bermuda	02/12/17	02/21/17	Assisted Media
BTA/ALHI Client Event	NYC	02/13/17	02/13/17	Group
Discovery Channel filming (EPI)	Bermuda	02/13/17	02/16/17	Press Trip
Jacinthe Dupuis - Air Canada Enroute - Oracle press FAM	Bermuda	02/15/17	02/16/17	Press
Connect Chicago	Chicago	02/16/17	02/17/17	Group
Jordi Lippe, Freelance	Bermuda	02/17/17	02/20/17	Press Trip
HSMAI Awards Event	New York City	02/21/17		Travel Trade
Bergdorf Goodman Event	NYC	02/22/17	02/22/17	Promotion
Hackers Cup	Bermuda	02/23/17	02/27/17	Golf

<b>Event Name</b>	<b>Location</b>	<b>Start Date</b>	<b>End Date</b>	<b>Type</b>
DMAI Foundation Celebration & Media Luncheon	Washington, DC	02/27/17	03/03/17	Travel Trade & Press
ALHI Luxury Showcases	Houston/Dallas	02/28/17	03/02/17	Group
National Golf Expo	Boston	03/03/17	03/05/17	Golf
Virtuoso Travel Week Tour	Dallas, TX	03/09/17	03/10/17	Travel Trade
Michigan Golf Expo	Novi, MI	03/10/17	03/12/17	Golf
UK Adventure FAM - Land Rover BAR	Bermuda	03/10/17	03/14/17	Press Trip
Pharma Forum (ALHI Booth)	National Harbor MD	03/12/17	03/15/17	Group
ALHI WDC Tradeshow & Reception	Washington DC	03/14/17	03/14/17	Group
Bermuda Cultural & Scenic Incentive Fam	Bermuda	03/14/17	03/18/17	Group
Grey Goose	Bermuda	03/17/17	03/19/17	Golf
Virtuoso, National Geographic	Bermuda	03/17/17	03/21/17	Press Trip
Travel Channel USA - Top Secret Beaches Series	Bermuda	03/18/17	03/26/17	Press Trip
DMAI CEO Summit	Nashville, TN	03/20/17	03/22/17	Group
Bill Springer - Ocean Home Magazine	Bermuda	03/21/17	03/24/17	Press Trip

<b>Event Name</b>	<b>Location</b>	<b>Start Date</b>	<b>End Date</b>	<b>Type</b>
IMN Solutions Client Site Visit	Bermuda	03/23/17	03/26/17	Group
Best Version Media Site Visit	Bermuda	03/23/17	03/27/17	Group
Connecticut Golf Show	CT	03/24/17	03/26/17	Golf
Legal Marketing Association (LMA) Annual Meeting	Las Vegas	03/26/17	03/30/17	Group
Louise Roe influencer stay with Rosewood Tucker's Point	Bermuda	03/26/17	03/31/17	Press Trip
Connect Diversity	Las Vegas, NV	03/27/17	03/29/17	Group
National Assc of Sports Commission Conference	Sacramento, CA	03/27/17	03/30/17	Group
UK Hotel Partner Event	London	03/30/17	03/30/17	Travel Trade

# *Sales Engagement Event*

Professional Convention Management Association  
Austin TX  
January 8 - 11

- Convening Leaders Designing Collaboration held in Austin TX; Suppliers and Planners over three days to network and attend educational sessions - approximately 3,000 attendees
- Attended the Chapter reception on Opening Night for New York & Philadelphia
- ALHI Member/Client Dinner



# *Sales Engagement Highlight*

National Soccer Coaches Association of America

Los Angeles, CA

January 10 - 15

- Secured New York Cosmos - March 2017
- 5 leads for 2018
- Developed relationships at the World's Largest Annual Gathering of Soccer Coaches and Administrators



# *Sales Engagement Event*

Incentive Live  
Las Vegas, NV  
January 18 - 21

- Boutique style, one-on-one appointment based exclusive travel event focusing solely on incentive market.
- Met with 25 hand-selected and fully- vetted incentive buyers with significant global purchasing power.



# *Sales Engagement Event*

International Franchise Association  
Las Vegas NV  
January 29 - 31

- Partnered with ALHI in booth at Annual Franchise and Franchisee Trade Show and Educational Sessions
- 3 Prospects
- Winner of Prize - Fairmont Southampton & Air Credit (\$500 per person) was awarded to Troy Stuhr - Field Consultant with KUMON



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# *Sales Engagement Highlight*

Virtuoso Travel Week Tour  
Atlanta, GA  
February 9 - 10

- Participated in 80 one-on-one, four minute appointments with travel agents over a 2 day period at the Intercontinental Buckhead



# *Sales Engagement Highlight*

Educational Travel Consortium

St. Louis, MO

February 12-16

- 40 one-on-one appointments
- Joint partnership with Fairmont Southampton
- 5 leads generated
- Pre-promoted Bermuda as the host of the ETC Conference in February 2018



# *Sales Engagement Event*

Connect Meetings  
Chicago IL  
February 15 - 17

- 2 days of one-on-one meetings and networking events with attendees handling Corporate/ Incentive, Association Markets and SMERF Markets
- 15 one-on-one meetings generated 4 strong prospects



# *Sales Engagement Highlight*

The Eastern Interscholastic Swimming & Diving Championships - Private High School & Charter School Swimming Finals

Lancaster, PA  
February 23-25

- Opportunity to network with Eastern and Tri-State coaches
- Secured two swimming groups for December 2017



# *Sales Engagement Highlight*

Beyond the Beach Adventure Travelers Site Visit

Bermuda

March 4-7

- 5 adventure travel counselors
- Itinerary included host hotel Newstead Belmont Hills, Hidden Gems Tour, Bikabout Trail (Eastern end of the island) with Premier of Bermuda, Crystal Caves, extensive guided tour of St. Georges, Dolphin Quest, and Pub Crawl with Town Crier
- Generated one lead for 2017



# *Sales Engagement Highlight*

Virtuoso Travel Week Tour

Dallas, TX

March 9 - 10

- Participated in 80 one-on-one four minute appointments over a 2 day period at the Fairmont Dallas



# *Sales Engagement Event*

Pharma Forum  
National Harbor, MD  
March 12 - 15

- Partnered with ALHI in during 13<sup>th</sup> Annual Forum, generating 2 prospects
- ALHI Member/Client Dinner



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# *Sales Engagement Event*

**Bermuda Cultural & Scenic Incentive Trip  
Bermuda  
March 13-18**

- Itinerary included host hotel Hamilton Princess and various other properties as well as experiences including Dockyard, St. George's and the Caves
- Contract signed for Conductor Incentive immediately following this trip



# *Sales Engagement Highlight*

IMN Solutions Client Site Visit

March 23 - 26

Bermuda

- Partnered with Fairmont Southampton to host 6 clients, resulting in 2 leads
- Hamilton Princess, Elbow Beach and Rosewood Tuckers Point hosted sites, lunch or dinner



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# *Sales Engagement Event*

Best Version Media Site Visit  
Bermuda  
March 23-27

- Attended by the third party planner and end-user client
- Co-hosted with Hamilton Princess and Select Sites
- Itinerary included historic and scenic sites, venues, restaurants, and activities



# *Sales Engagement Event*

Legal Marketing Association  
Las Vegas, NV  
March 26-29

- Met with 15 decision makers in the legal community at ALHI networking reception; 3 leads generated.
- Throughout the 3-day event networked with an additional 20 decision makers from the marketing and events areas of the legal community; they demonstrated interest in Bermuda for retreats and small board meetings.

# *Sales Engagement Event*

UK Sales Mission  
England  
February 6-10

- Meeting with UK team for market overview and recap of 2016 activity and trends
- Meetings with UK Government office, Expedia, 1851 Trust, British Airways, Media Agency Group, Carrier, Lusso, ITC Luxury Travel, Travel Places and Gentleman's Journal.
- Partner Lunch at Bob Bob Ricard with 10 key UK Travel partners



# *Sales Engagement Event*

Taste of Bermuda Event  
England  
March 30

- Produced event for tourism & hotel partners with 65 guests including UK Travel Trade, UK Media and UK-based Bermudian influencers
- Supported by hotel partners from Cambridge Beaches, Elbow Beach, Grotto Bay and Hamilton Princess & Beach club
- Create an immersive Bermudian experience, through food, drink, sound and vision
- Bermudian Junior MasterChef contestant cooking canapes
- Dark n' Stormy and Rum Swizzle for all guests on arrival and through the nights
- Interactive “paint by numbers” image of Flatts Village invited guests to colour in Bermuda



*Paid Media &  
Partner Marketing*

# *Q1 Overview & Topline Results*

- Q1 integrated media programs attained over 196.6 million gross impressions
- Garnered a total of 713,720 digital media web visits and 3,482,682 non-web engagements for the quarter
- Pacing at 28% for media engagements through Q1 (benchmark is 25%)
- CTR at .39% for Q1, which compares favorably to the industry standard of .05 - .15%
- Cost per engagement averages \$0.19 for the quarter, which is comparable to where we ended the year in 2016
- 3,216 flights from Adara Impact in Q1

# Q1 Media Highlights

## MESSAGING BY MONTH

*January: Pink Sale, NYC & Brand, February: Brand, Oscars & Philadelphia-Specific Efforts, March: Brand, Philadelphia & Group*

## INTEGRATED PARTNERSHIPS

*Launched annual campaigns with AFAR, Conde Nast Traveler, Garden & Gun, New York Magazine, New York Times, New Yorker and Travel + Leisure*

## PROGRAMMATIC SOLUTIONS

*Continued partnerships with proven traffic drivers, such as Adara, Sojern, Kayak, Trip Advisor, Expedia, Digilant and more*

## NOTEWORTHY NEW PARTNERS

*Samba TV (addressable television audiences at scale), HULU broadcast extension, LinkNYC (charging/wi-fi kiosks in NYC)*

# *Pink Sale Overview*

**ON-SALE DATES: 1/5-1/31**



## **GEO-TARGETING**

New York Tri-State, Boston, DC Metro, Chicago, Philadelphia, Toronto, Atlanta, Charlotte

## **CHANNELS**

Digital included paid emails, social media, travel endemic sites, and news (USA Today)

Out-of-Home in NYC only, on LinkNYC (charging/wi-fi kiosks) and the Captivate Network (digital elevator signage)

## **SUPPORTING MEDIA**

Several print insertions and television schedules in NYC, Boston and DC ran during this time period, but were Brand-focused (no specific Pink Sale call-out)

## **SITE TRAFFIC YOY**

Garnered about 2.5X the amount of site traffic during Pink Sale time period, as compared to 2016 results

– 2016: 136,496

– 2017: 339,153

# *Pink Sale Media Strategy*

- Majority digital retail
- Heavy email marketing
- 29.8 million impressions
- Dynamic weather triggers
- Consensus on extending sale window with hotels
- Digital out of home campaign with vehicle recognition technology at Holland Park roundabout's iconic digital display, First travel business to use this technology in the UK

**30°**  
MANHATTAN

**68°**  
BERMUDA

*Warm up for less.*

**Pink Sale**  
UP TO  
**50% OFF**

*Just a 90 minute flight from NYC.*

[GoToBermuda.com/pinksale](http://GoToBermuda.com/pinksale)

CAPTIVATE ELEVATOR TAKEOVER WITH WEATHER

**30°**  
Manhattan

**68°**  
Bermuda

**Pink Sale**  
UP TO  
**50% OFF**

*Warm up for less.*  
*Just a 90 minute flight from NYC.*

*Sale ends January 24*

[GoToBermuda.com/pinksale](http://GoToBermuda.com/pinksale)  
\*All participating hotels, dates and restrictions apply.

NYC LINK WEATHER

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## *Pink Sale Performance*

KEY METRICS	2017 YTD	2016 ACTUAL	% Δ Growth From 2016	2015 ACTUAL	% Δ Growth From 2015
Website Sessions	234,427	171,857	36%	199,739	-14%
Pink Sale Page Sessions	180,345	146,824	23%	132,172	11%
Exit Link Clicks (to hotel partners)	N/A	N/A	N/A	11,552	90%
Total Reservations	6,594	4,428	49%	1,667	166%
Room Nights	30,608	19,900	54%	6,895	189%
Direct Visitor Spending	\$14.6 million	\$8.8 million	60%	\$4.2 million	115%
<b>ROI</b>	<b>24-1</b>	<b>14-1</b>		<b>16-1</b>	

# OTA Program Overview & Highlights



Trip Advisor test ad mock-up

- OTA performance metrics snapshot:
  - 15MM impressions across Expedia Inc, driving both on and offsite traffic
  - 5.5MM impressions on Trip Advisor
- Trip Advisor has selected Bermuda as “creative test partner” which is rolling out in Q2, and includes the following data:
  - Broad weather trends
  - Upcoming events
  - Different trip types
  - Itinerary ideas
- Trip Advisor sponsorship page generated over 300K page views from Jan-Mar
- Expedia reports a gross increase of 23% in hotel bookings, and 9% in air bookings YoY (reporting period is month of Feb only)

# Bergdorf Integrated Partnership

## BG MAGAZINE PHOTO SHOOT

- Organized two on-location fashion shoots for both the men's and women's Spring 2017 catalogues
- 10-page fashion shoot in BG Magazine reaching 200,000 print and digital
- 18-page fashion shoot in the Goodman Guide reaching

goodman's guide



MEN'S STORE  
BERGDORF GOODMAN



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# Bergdorf In-Store Event & Window Display

FEBRUARY 2017 | NEW YORK

- Organised an in-store event in BG restaurant featuring the cuisine of Chef DeShields from Cambridge Beaches Resort & Spa for 100 influencers on February 22
- Collaborated with Bergdorf Goodman window designers for a two-week Bermuda-inspired window display located at 58<sup>th</sup> Street and Fifth Avenue in New York City from February 23 - March 10



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# *Website, SEM, SEO & Analytics*

# Web Metrics

## Q1

### TRAFFIC

Traffic was up 11.11% in Q1, due to a combined effort from digital media, organic search, and paid search.

Comparing campaigns, Pink Sale accounted for 100,413 sessions last year and 117,663 sessions this year. All engagement metrics improved as well.

Organic traffic continues its strong performance, up 11.85% over last year Q1. Engagement metrics have all improved here as well

### POPULAR LANDING PAGES

*/pinksale – 25.29% of traffic*

*Homepage – 25.29% of traffic*

*/deals – 5.88% of traffic*

*/list/discover-the-seven-wonders-bermuda – 4.47% of traffic*

*/island-experiences – 2.69% of traffic*

# *Total Site Traffic & Goals – Q1*

- 11% YOY growth in site sessions Q1 2017
  - 52,000 additional visits – 523,100 sessions in Q1
  - 509,000 additional page views – 1,460,800 page views in Q1
- 34.7% of all sessions completed a conversion goal in Q1
- New site has shown significant increase in goal completion
  - Time on Site Over 3:30 – 104,200 – **61% increase over Q1 2016**
  - Hotel Inquiry – 14,200 – **18% increase over Q1 2016**
  - Brochure Downloads – 10,150 – **52% increase over Q1 2016**
  - Brochure Orders – 2,200 – **45% increase over Q1 2016**
  - eNews Registration – 1,900 – **192% increase over Q1 2016**

# *Total Site Traffic & Goals – Q1*

- Total Partner Referrals – 77,000
  - Partner referrals – 48,700
  - Deal referrals – 21,200
  - Event referrals – 7,100
- Total Partner Pageviews – 261,000
  - Profiles – 132,000
  - Deals – 116,000
  - Events – 13,000
- 30% Click through rate to Partners

# SEM Performance - Q1'17

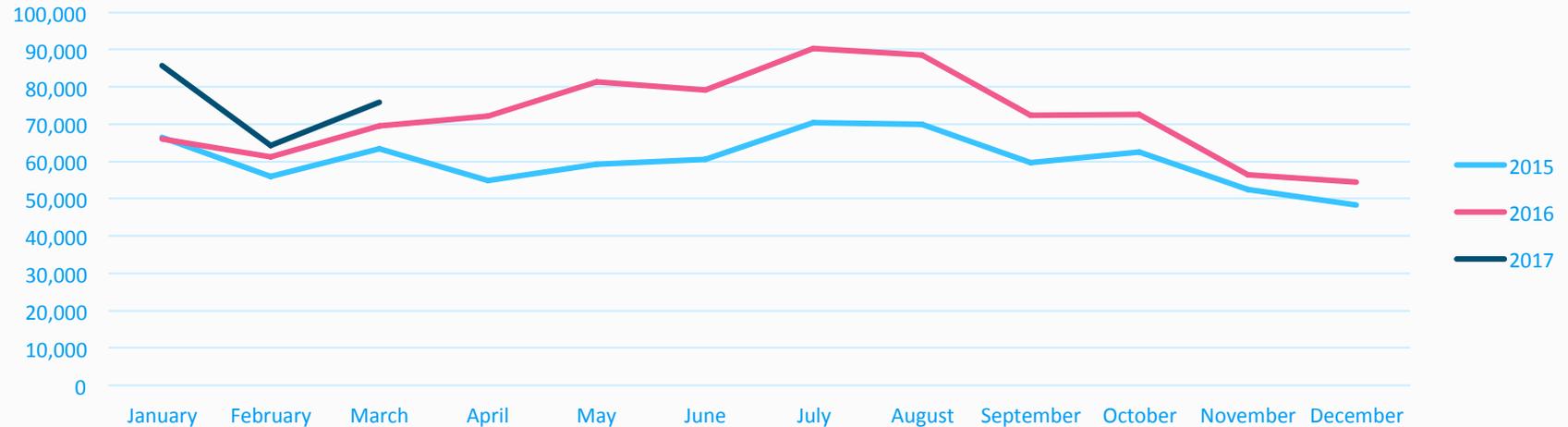
In Q1, SEM campaigns delivered a total of 132,824 clicks, with an average CPC of \$0.79 & a CTR of 3.46%. Total spend for the quarter was \$104,790.72, with 31,381 total conversions.

Month	Impressions	Clicks	CTR	CPC	Spend	Avg Pos.	Conversions
January	1,380,243	48,320	3.50%	\$ 0.82	\$ 39,685.08	1.6	11,530
February	1,176,983	40,482	3.44%	\$ 0.75	\$ 30,168.54	2.0	9,747
March	1,281,510	44,022	3.44%	\$ 0.79	\$ 34,937.10	1.9	10,104
<b>Total</b>	<b>3,838,736</b>	<b>132,824</b>	<b>3.46%</b>	<b>\$ 0.79</b>	<b>\$ 104,790.72</b>	<b>1.8</b>	<b>31,381</b>

- Quarterly Comparison
  - Clicks up 2% from Q4
  - CPC improved by -\$0.04 from last quarter
  - Spend is down by -3% (Q4 had incremental pushes for video & Gmail)
- Bounce Rate for Q1 was 49%
- Benchmark Comparison
  - CTR is above the 3% benchmark
  - CPC is very competitive under the \$1 mark

# Total Search Traffic

- Total Search Traffic consists of Organic Search, Paid Search, Referrals from Google.com and 50% of Direct traffic based on Industry Research
- 15% YOY growth in Q1 2017 – 29,100 additional visits



# Google Rank Improvements

The number of keywords the site ranks on Page 1 of Google for is consistent with last year at just over 1,300 keywords and +3% YoY

	March 2017	March 2016	YoY Change
Ranked on Page 1	1,319	1,281	+3%
Ranked on Page 2	838	589	+42%
Ranked on Page 3	333	394	-15%
Ranked on Pages 4-10	1,324	2,455	-46%

# Google Ads & Banners - Q1'17

*Out Here*  
IT'S ALWAYS BEEN FUN  
TO BE A LITTLE OFF COURSE.



**BERMUDA** FIND YOUR JOURNEY

Beautiful Bermuda Island  
Plan Your Island Vacation  
[gotobermuda.com/Island/Experiences](http://gotobermuda.com/Island/Experiences)  
Make The Best Of Paradise. Visit Official Site For  
Deals & Specials!

Bermuda Island Weather  
Plan Your Vacation Today  
[gotobermuda.co.uk/Bermudas/Weather](http://gotobermuda.co.uk/Bermudas/Weather)  
Best Prices On Air & Accommodation. Find Info &  
Deals on Official Site!

*Out Here*  
IF YOU'RE UNSURE WHERE THE TRAIL LEADS,  
YOU'RE ON THE RIGHT PATH.



**BERMUDA**  
START EXPLORING.

*Out Here*  
WHEREVER LIFE LEADS,  
MYSTERY IS SURE TO FOLLOW.



**BERMUDA**  
FIND YOUR MYSTERY

**BERMUDA**

# *eNewsletters & Performance*

# Q1 2017 eNewsletters

## JANUARY NEWSLETTER

### Themes:

Pink Sale  
Travel Tips  
Sightseeing/Tours  
Outdoor Adventures  
Restaurant Weeks

### Subject Line:

Book Now and Save with Bermuda's  
Annual Pink Sale  
Book Now and Save Up to 50% Off  
Hotels in Bermuda

## FEBRUARY NEWSLETTER

### Themes:

Secluded Spots  
Island Insiders  
Desserts  
Spas  
America's Cup  
Bermuda Triple Challenge

### Subject Lines:

Let Bermuda Take Your Breath Away  
Bermuda, So Much to Love in 2017

## MARCH NEWSLETTER

### Themes:

America's Cup  
Golfing  
Moongates  
Cycle & Sea  
Win a Trip for Two  
Whale Watching  
Golf Courses

**Subject Line:** Cycle, Stroll, or Sail Away in  
Bermuda  
Start Planning Your 2017 America's Cup  
Adventure



# *Promotions & PR*

# *North American Coverage Highlights*

## YTD COVERAGE SNAPSHOT

- Number of Articles: 52
- Impressions: 250,774,889
- Media Value: \$3,094,462.79
- Average Score: 76

## Islands



Best Places to Travel in 2017

Warwick Long Bay Beach on Bermuda

### Bermuda

Hey, sailors: In May, the 35th annual *America's Cup* heads to the pink-sand beaches of the Great Sound, a prime time for racing enthusiasts. The event's official hotel partner, The Hamilton Princess & Beach Club, transformed its "pink palace" with new guests suites, exhale spa, a state-of-the-art marina and three new restaurants including celebrity chef Marcus Samuelsson's new venue, Marcus. The upcoming Ritz-Carlton Reserve hotel and branded residences plan to open a mega-yacht marina in time for the race, but keep this island on your long-term radar: Michael Douglas and Catherine Zeta Jones break ground on the redevelopment of the famed Ariel Sands resort in 2017.

*Islands.com* – January 3, 2017  
Destination Feature

# North American Coverage Highlights



**DALLAS NEWS**  
Powered by The Dallas Morning News

## DEPARTURES

**DUJOUR**

2017's Most Romantic  
Destinations



**These travel hotspots will give you something to look forward to in 2017**

### Bermuda

BERMUDA IS AN ISLAND PARADISE, A PERFECT BLEND OF BEACHES, HISTORIC SITES, AND OUTSTANDING SCENERY. THE ISLANDS ARE A GREAT PLACE TO VISIT IN 2017, OFFERING A PERFECT BLEND OF BEACHES, HISTORIC SITES, AND OUTSTANDING SCENERY. THE ISLANDS ARE A GREAT PLACE TO VISIT IN 2017, OFFERING A PERFECT BLEND OF BEACHES, HISTORIC SITES, AND OUTSTANDING SCENERY.



*Departures – January 9, 2017  
Destination Feature*



*DuJour.com – February 7, 2017  
Destination Feature*

*Dallas Morning News – January 1, 2017  
Destination Feature*

BERMUDA

# North American Coverage Highlights

**USA TODAY**



Find a taste of place in Bermuda's oldest town

*USAToday.com – January 5, 2017  
Bermuda Cuisine*



**Robb Report**

*Robb Report – March 21, 2017  
Destination Feature*

**Bloomberg Pursuits**



**The Best New Resorts  
in the Caribbean**

*Bloomberg.com – March 16, 2017  
Hamilton Princess & Beach Club*

BERMUDA

# North American Coverage Highlights

AD

Design Lovers  
Will Be Visiting  
These 5 Places  
This May



*ArchitecturalDigest.com – March 20, 2017  
Top 5 Places for Design Lovers in May*

GARDEN@GUN



BELOW THE LINE

A Year of Southern Travel

*GardenandGun.com – January 18, 2017  
Where to Go in 2017*

United Hub



The must-see  
travel hotspots of  
2017

*United Hub – January 4, 2017  
Destination Feature*

BERMUDA

# *North American Press Trips*

## Q1 MEDIA VISITS

- Laurie Werner, Robb Report – January 12-16
- Theodore Reinstein, Chronicle on ABC Boston – January 23-27
- Jordi Lippe, Condé Nast Traveler – February 17-20
- Annie Fitzsimmons, National Geographic Traveler
- Bill Springer, Ocean Homes – March 21-24

# *North American Press Trips*

TASTE OF BERMUDA LUNCH  
WASHINGTON, DC |  
FEBRUARY 28

## Attendees:

- Jayne Clark, Freelance
- Laura Powell, Freelance
- Sery Kim, Freelance
- Erin Shields, U.S. News & World Report
- Hannah Cheney, U.S. News & World Report
- Amy Alipio, National Geographic Traveler
- Jen Richer, The Tommy Show
- Elizabeth Thorp, Poshbrood
- Virginia Coyne, Washington Life Magazine
- Jess Moss, Freelance

# North American Press Trips

COVERAGE GENERATED FROM PRESS TRIPS

**Forbes**



A Sleek,  
Distinctive Hotel  
Opens in Bermuda

*Forbes.com* – February 27, 2017  
*Travel Feature*

**COOL  
HUNTING**



Sailing in  
Bermuda with  
America's Cup  
2017

*CoolHunting.com* – February 9, 2017  
*America's Cup*

**TRAVEL+  
LEISURE**



50 Best Places to Travel in 2017

Bermuda

After being hit hard by the financial crisis, Bermuda is shaking itself out of stagnation and attracting a new generation of travelers. In 2014, the island won a bid to host the 35th America's Cup, the high-profile international sailing race, which takes place this June. The promise of a flood of wealthy visitors—and a loosening of restrictions

*Travel + Leisure* – January 4, 2017  
*Where to Go in 2017*

BERMUDA

# North American Press Trips

## COVERAGE GENERATED FROM PRESS TRIPS

redbook



**Find It:** Hamilton, Bermuda

A quick two-hour flight from the east coast lands you in Bermuda, the country that gives you all the benefits you expect from vacations in the Caribbean, without the risk of actually being in the Caribbean (though, that's only, cough). And while you may not experience any risk of disease, treatments at this specific spa (through The Four-Handed Massage) is quite risky, it's really the environment that you're coming to experience. All of the treatments are located in a 500,000-year old cave that rests seven miles sea level and houses an underground lake amongst thousands of stalactites and stalagmites. Each massage is given inside a cubicle that floats right over the lake, so you can stare into crystal clear turquoise water while your relaxation therapy steams every sensory away.

**Book It:** [redbook.com](http://redbook.com)

Redbook.com – January 13, 2017  
Spa Feature

WESTJET  
MAGAZINE



GRAND CAYMAN  
GRAND CAYMAN

Grand Cayman is the Caribbean island that offers a variety of world-class water sports, from water skiing, jet skiing, and parasailing to scuba diving and fishing. The island is also home to a variety of other activities, including golf, tennis, and horseback riding. The island is a great place to visit for anyone who enjoys water sports and outdoor activities.

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WestJet Magazine – January 19, 2017  
Destination Feature

about.com



### 5. Take a Historic Bike Tour

The island chain is rich in history, especially when it comes to pirate lore. One of the best ways to get the lay of the land (and sea) is actually by bike tour. Book a tour with [Island Tour Centre](http://Island Tour Centre) and cruise along the Bermuda Railway Trail—a defunct national rail project that's been repurposed as one of the world's most beautiful recreational trails—before hiking up to Fort Scurry, where you'll see incredible views of the bay.

### 7. Catch the America's Cup

Next June, Bermuda's Great Sound will play host to the [2017 America's Cup](http://2017 America's Cup)—the oldest international sailing race in the world. Pay a visit to the Royal Naval Dock Yard to see the best sailors of our time racing the fastest boats in the sea for the prestigious award. Even if sailing isn't your thing, the islands will come alive to host the international event—the America's Cup Village will boast tons of concerts, culturally inspired entertainment and a host of Bermuda's famous seafood.

About.com – January 19, 2017  
Destination Feature

BERMUDA

# UK Coverage Highlights

## YTD COVERAGE SNAPSHOT

- Number of Articles: 101
- Media Value: \$313,247
- Impressions: 48,670,728
- Publications inc: BBC TV, Independent, Times, Evening Standard, Square Mile, Telegraph, ULTRA & Grazia
- Influencers inc: Liberty London Girl & Ross Edgley
- Content partnerships with Vanity Fair & Gentleman's Journal

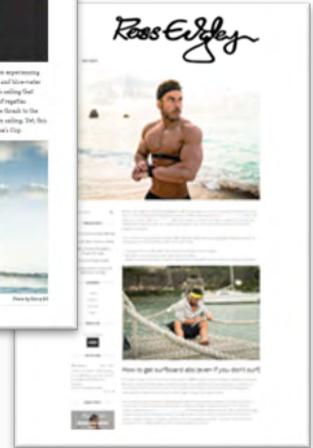


# UK Press Trips

## COVERAGE GENERATED

### FROM PRESS TRIPS

- Land Rover BAR team base opening: BBCTV South, Evening Standard, Gentleman's Journal & Mayfair magazine
- Group fitness trip: Metro, FitnessOnToast, Ross Edgley & Jack Guinness (for GJ)



BERMUDA

*Social*

BERMUDAΔ

# Q1 Top-Performing Posts



Reached Users: 133k  
Reactions: 5K  
Post Clicks: 2.8K



Impressions: 7,168  
Engagements: 1,114  
Retweets: 44  
Likes: 92



Likes: 2033  
Comments: 38  
Engagement: 2096

This quarter, the top-performing posts focused on relevant articles and sunny scenery. For Facebook, the top-performing was about Conde Nast Traveller naming Horseshoe Bay beach one of the most beautiful beaches in the world. This post was purely organic and the link format also caused to do better in the algorithm than it would have as an image with a link next to it. For Twitter, the top-performing post showed an overview of Tobacco Bay. The top performing Instagram post also involved the beach, and was a very simple, minimalistic photo that sums up the scenery of Bermuda well. The caption about picking pink or blue also sparked a lot of comments. 2,096 people either commented, liked, saved, or shared this photos.

# *Paid Social*

## Q1 CAMPAIGN SNAPSHOT

Campaign	Spend	Objective	Results	Unique Users	Total Impressions	Cost per objective
Crystal Caves	\$11,249.79	Website Clicks	16,562	1,254,418	2,746,877	\$0.68
Q1 Accolades Carousel – Afar	\$6,079.56	Website Clicks	10,941	707,200	1,552,528	\$0.56
Q1 Accolades Carousel – Travel + Leisure	\$6,082.45	Website Clicks	9,868	562,782	1,186,646	\$0.62
Q1 Accolades Carousel – Lonely Planet	\$6,081.00	Website Clicks	19,480	626,294	1,029,801	\$0.31
Philadelphia 2017	\$4,497.61	Website Clicks	6,497	230,841	486,050	\$0.69
Fashion Week 2017 – Event Targeting (Completed)	\$2,498.25	Local Awareness	154,828	108,241	154,828	\$3.06
Royal Naval Dockyard Carousel	\$5,142.32	Website Clicks	5,225	353,736	696,748	\$0.98
Food Culture Carousel	\$5,199.87	Website Clicks	8,702	361,037	736,216	\$0.60
Land Adventures Carousel	\$5,152.69	Website Clicks	4,745	265,761	508,021	\$1.09
Pink Sale (Completed)	\$10,000.00	Website Clicks	14,613	476,265	1,234,987	\$0.68

# Sample Accolades Creative

**Bermuda Tourism (Default)**  
Written by MMGY Global [?] · February 13 at 1:59pm

See why Afar named Bermuda "Where To Go in 2017."



Views unlike any other.



Home to the 35th America's Cup

**Bermuda Tourism (Default)**  
Written by MMGY Global [?] · February 13 at 1:59pm

See why Afar named Bermuda "Where To Go in 2017."



Home to the 35th America's Cup.



Unforgettable



**Bermuda Tourism (Default)**  
Written by MMGY Global [?] · February 13 at 1:59pm

See why Afar named Bermuda "Where To Go in 2017."



Unforgettable colours and culture.



Find your way

Q1 Accolades Carousel – AFAR

BERMUDA

# *Investment Division*

# *During Q1 of 2017, the Investment Division focused on the following:*

The investment division continued its mandate of developing an investment environment for domestic and international investors and operators in Bermuda. The division remains focused on working with the Bermuda Government to introduce revised legislation to attract foreign direct investment and review and modernize legislation that currently retards investment in tourism related industries. The outreach to both local and international investors and operators as well as infrastructure service providers remains a core activity and focus.

1. The draft Tourism Investment Act 2017 was laid in the Senate in March for 6-week consultation.
2. Introduced and accompanied local hotel investor to a meeting with a major hotel brand.
3. Accompanied the Bermuda Gaming Commission to a major gaming conference and met with potential casino operators and owners.
4. Continued quarterly meeting with local hotels owners and operators to assess local operating conditions.
5. Working with ACBDA to construct a portfolio of opportunities to made available to potential investors during America's Cup.
6. Continued attendance at investment and development conferences to raise awareness of impending changes to Bermuda's investment environment.

# *Operations Division*

# *During Q1 of 2017, the Operations Division accomplished the following:*

The rollout of the national service standards, opening the process to certification to the wider tourism and hospitality industry.

## *Operations, General*

### Human Resources

As at March 31, 2017 BTA had 40 employees in the Bermuda and New York offices. This includes full time permanent and one full time-fixed term contract. The breakdown of the divisions is as follows:

Investments	2
Operations/CEO	10
Product and Experience	8
Research and Business Intelligence	2
Sales and Marketing	18

## Human Resources (continued)

### **Recruitment**

In Q1, the Product and Experience Division recruited a Supervisor of the Dockyard Visitor Information Centre. The incumbent has worked as a Contractor at the VIC for the past 3 years.

Applications were also sought for two Summer Interns. Each applicant was asked to submit a short essay as part of the application process. These submission are currently being vetted and a final determination will be made by the end of April. There were no terminations.

### **Performance Management**

Keeping in line with the BTA's commitment to retaining and motivating performance of employees, the formal performance appraisal process was conducted in January in New York and Bermuda.

### **Engagement/Measurement and Metrics**

The BTA has solidified its committed to increasing Employee engagement by adding it to the Corporate Goals for 2017. The Gallup Q12 Employee Engagement survey, which has been used by Fortune 500 Companies to measure "what matters" to employees and to help strengthen the workplace environment, was conducted in the Spring and Winter of 2016.

For 2017 the organization will take a monthly "pulse" survey to assist in tracking the success of, and improving the effectiveness of, organizational initiatives, programmes and goals as they impact and align with achieved results, employee perceptions and expectations, and supporting and maintaining BTA's unique culture.

## Human Resources (continued)

### **Wellness Committee**

The Wellness Committee consisting of Kyle James, Keitha Trott and Willa Douglas, have scheduled several events and challenges for 2017. The team has also partnered with Argus Health through their “Thrive” programme to promote a healthy life/work style for the organization. The committee will coordinate health challenges as well as lunch and learn sessions on personal finance and wellness seminars.

### **HR Systems**

HR continues to strive for maximization of the existing Employee Portal. In January, the team used the Performance Management module for the Employee Self-Assessment process.

In 2017 HR, along with Finance, will further explore the viability of the portal to determine how to maximize its capabilities today and in the future.

## Training & Standards

### National Service Standards Introduced

Following the identification of the five service principles and intake of pilot participants in Q4 of 2016, the BTA continued to grow the NSSP program and participant list. In Q1 of 2017, BTA welcomed a new intake of 11 business units within 8 organizations who successfully applied for the opportunity to achieve national service standards certification.

*27th Century Boutique*

*The Reefs Hotel*

*Newstead Belmont Hills*

*La Serena Spa (The Reefs)*

*Bermuda Fun Golf*

*Bermuda Aquarium & Zoo*

*Premier Tickets*

*Tobacco Bay Beach Club*

*The Bermuda Perfumery*

*Tarzan*



These organizations add to the already diverse group representing many sectors in Bermuda's tourism industry.

Training in support of the service standard principles was also introduced for participants in the Pilot program. BTA has introduced a sustainable training model that allows businesses pursuing certification to close service delivery gaps that stand in their way.

A web-based portal was introduced to facilitate all aspects of the National Service Standards Certification process, from initial expression of interest to online training registration, as well as customer feedback and mystery shops. Details can be found at [www.Service.bm](http://www.Service.bm)



### **Certified Tourism Ambassador (CTA) Renewals & Promotion**

At the end of Q1 2017 there were 758 Certified Tourism Ambassadors in Bermuda. 206 of which were newly registered CTAs from Q1 alone. The BTA facilitated two CTA exclusive information sessions at the Bermuda Underwater Exploration Institute on Tuesday March 28th and Tuesday March 7th. Nearly 100 CTA's attended to learn first-hand about the BTA's focus for 2017, to view the latest marketing campaign, and hear the latest on summer activities including America's Cup.

### **Expanded F&B Skills Training Initiative**

The BTA's efforts in spearheading a partnership with educational and training stakeholders to deliver an expanded skills programme for waiter/servers continued in Q1. Several cohorts completed the Waiter/Server programme offered by the Bermuda College, with members of the Chamber of Commerce Restaurant Division participating in the curriculum. The majority of students were supported by the Department of Workforce Development, with many receiving job placements prior to the course end.

## Public & Stakeholder Communication

### **2016 Year-end Report**

A year-end report with exceedingly positive results, the first for the BTA, was presented to stakeholders, including local media, at BUEI. The presentation followed an America's Cup information session, thus ensuring it was shared with an industry audience and providing good value in space usage

We augmented the presentation with media appearances by CEO Kevin Dallas on local radio.

### **America's Cup**

Assistance was provided to the Sales and Marketing team via a hoteliers' meeting held to encourage hotel properties to release some of their held-back America's Cup inventory to OTAs. This appeal was made to ensure Bermuda didn't look sold out to consumers during May and June when inventory was available but hidden. It was a difficult sell. However, following the session, hoteliers' were more aware of how the pace of bookings was at least partially in their control. Ultimately, they decided not to take any action as a group but a few acted independently.

Later in the quarter there was education for suppliers and event planners to prime them for the substantial booking action expected to happen quickly and in a tight time frame as sponsors and other groups finalized their plans closer to the actual event.

### **Adrian Awards**

The BTA team picked up four Adrian Awards in New York City. Locally, this accolade received a lot of kudos, including from the Opposition. A monthly tourism forward clip was created to revisit this accomplishment in Q2.



## Public Opinion

Confidence in BTA: In Jun 2016 the public was asked in a telephone poll whether it was confident that the BTA is improving tourism in Bermuda: **36% said yes, 25% said no.**

When asked the same question in Mar 2017, **49% said yes, 9% said no.**

In the Bermuda context this is a huge shift toward a more positive public opinion of the BTA.

Sports Tourism: In **Jun 2016** the public was asked in a telephone poll whether it believed sports tourism was improving tourism performance in the shoulder season. **36% said yes, 17% said no.**

When asked the same question in Jan 2017, **52% yes, 11% said no.**

Effective storytelling, public relations and stakeholder engagement are thought to play a key roles in changing public opinion in a way that is more favorable of the BTA.

## Sports Tourism

Consistently sports tourism and its impact on the shoulder season is a large part of BTA storytelling each quarter. Q1 focused attention on a weekend in March where four events were bringing 400 visitors to the island – Grey Goose World Par 3 Championship, Bermuda Triple Challenge, NY Cosmos Pre-season Training and Bermuda Rugby 7s. Engagement included a press conference where representatives of all four events were present.

*Sidenote: the weekend exposed the organisation's weakness in the area of event branding. Other sponsors outshined the BTA in this area.*

## **CRM & Website Training**

Important behind-the-scenes progress was made in this area during Q1. After some training from the marketing team, the operations division took over control of simple updates to the corporate side of the gotobermuda.com website through the CMS. This includes adding press releases, updating the corporate homepage, uploading files (including statistical reports), adding events, etc.

Meantime, on the CRM, more efficient usage of this tool is evolving regularly to facilitate better communication with stakeholders and also is paving the way to get more stakeholders loaded into the CRM so their businesses are displayed on the gotobermuda.com website. There was also some prep work conducted to prepare for the Simpleview CRM Summit in Arizona in April.

## **Beach Economy**

There was a lot of activity in this space, albeit with mixed results.

A small BTA team (covering operations, investment, product) began attending weekly progress report meetings with Public Works concerning the transportation hub project at **Horseshoe Bay**. Participation allowed the team to inspire the government/DCI to create a video that explained how beach-goers could use alternate access points to get down to the beach from South Road. Also being in this meetings allowed BTA to get an early indication that April/May cruise calls could be adversely affected by the transportation construction project. This gave the product and experiences team an early start on devising a work-around plan to preserve traveller satisfaction.

### **Beach Economy (continued)**

At **John Smith's Bay** a real victory in that the Department of Land and Buildings consulted with the BTA and its Beach Economy Vision thoroughly before putting out an RFP for new vendors at this beach. BTA are also guaranteed a seat at the table through the vendor interview process. Additionally, working with the ministry's permanent secretary to search for a firm to "prepare the platform" that John Smith's Bay concessionaires will operate from.

Work at **Shelly Bay** hit a snag because the approved concessionaires reported having to invest more than originally planned to make the structure suitable for use. His expectation was that his lease would be extended or rent-free provisions would be extended to off-set his up-front investment. This process of negotiation has slowed progress and makes a fully operational concession at Shelly Bay in the summer of 2017 impossible.

Progress at Clearwater has been strong this off season with a new concessionaire, Beach Boys, having signed a deal to operate here. There are some economy of scale advantages as Beach Boys also operate at **Tobacco Bay**. The hope is that the visitor experience at these beaches improves and new transport options emerge. Gombey's continues to operate at Clearwater and the added threat of competition has forced them to develop their visitor experience as well.

### **Bermuda Business Development Agency**

Research & Business Intelligence and Public & Stakeholder Relations hosted a session for Bermuda Development Agency (BDA) business development managers, walking them through BTA's organisational structure, key objectives and budget. The goal was to would foster a stronger working relationship between the organisations at the middle management level.

## Rail Trail Event

Although the weather on the day of the Rail Trail Event was wholly uncooperative, the buzz created around Rediscover the Rail Trail was sufficient to accomplish the objectives, at least partially:

- Reimagine the Rail Trail as a modern-day tourism asset with cultural relevance
- Rediscover its benefits as a health and wellness experience
- Refine as a year-round adventure for visitors and locals

These objectives are also closely related to some of the organisation's overall goals. The larger plan was always two events - one in the east and one in the west - and that is still the game plan. The second event is planned for Q4.

Note related email marketing:  
3,630 messages delivered,  
1,198 viewed  
- Open rate of 33%.



## **Email Stakeholder Marketing**

During Q1 the Tourism Forward open rates were particularly strong. January's message about the departure of Bill Hanbury was one of the best performing Tourism Forward messages since the campaign started in April 2016.

For this series a short video is distributed to BTA stakeholders via email that focused on one relevant topic of interest within the tourism industry. In addition to e-mail distribution, the content is shared with Bernews who posts it as part of an advertorial agreement. Topics covered during the quarter are as follows (with some performance stats included):

### **January - Thank You, Bill Hanbury**

510 (48% of total)

156 clicks (CTR 31%)

444 views on Vimeo

### **February - Ocean to Table**

359 opens (36% of total)

N/A

186 views on Vimeo

### **March - Rail Trail Fisherman**

See above for Rail Trail email marketing

429 views on Vimeo

Also of note: the CEO's articulated position on a new airport for Bermuda was also a piece with strong email marketing statistics. There were 457 opens of that message representing a 36% open rate.

## Tourism Appreciation

### **#LoveMyBermuda**

In Q1 the BTA continued the grass roots campaign #LoveMyBermuda. This phase of the campaign targeted an older demographic of Bermudians. Seniors were approached and unprompted, and asked to speak on why they love their Bermuda. A compilation of the clips was made into a 60 second video for public viewing in local theatres and television.

In addition to the interviews that took place on the street, the #lovemybermuda Johnny Barnes mascot monthly roundabout appearances continued with three different student groups. On January 2nd PHC's youth football team made an appearance, on February 6th Cedarbridge Academy was in attendance and on March 6th the Boy Scouts & Brownie Girls waved in morning commuters. These events were captured in picture and video before being turned into a 60 second advertisement on rotation in local theatres and news stations.

# *Income Statement*

## *Experience Investment*

**Income** - Tourism Authority Fee - these are currently \$100k ahead of budget, and is in line with growth in hotels RevPar for Q1.

**Direct costs** - Details of each of the division's activities are elsewhere in the report. The expenditure for Sales and Marketing is currently ahead of budget due to a number of full year digital packages being charged in the quarter.

**Structure, General & Administration** - These are generally in line with budget. There is currently a saving in professional fees and the grant to BHI, which has historically been paid as one payment in March/April, is now paid in equal quarterly installments.

## *Balance Sheet*

**Bank** – the balance at the end of the quarter was \$1.58m

**Accounts receivable and accrued income** – This represents the hotel fees for March (not Payable until 15 April) and any amounts overdue for the previous months.

**Inventory** – this relates to items at the Dockyard VIC and consist mainly of Transportation passes.

**Vendor payables** – the majority of the \$3.4m payable relates to media buys and the balance of the sponsorship payment due to ACEA.

**Accruals** – this is mainly to payroll related costs.

# Income Statement

For the Period Ended March 31, 2017

	Quarter 1 2017			Year To Date		
	Actual	Budget	PY	Actual	Budget	PY
Income	6,479,970	6,380,340	5,776,223	6,479,970	6,380,340	5,776,223
Direct costs	7,293,451	6,071,665	4,112,743	7,293,451	6,071,665	4,112,743
Direct surplus (deficit)	(813,481)	308,675	1,663,480	(813,481)	308,675	1,663,480
Structure, general & administration costs	2,264,000	2,660,005	1,918,393	2,264,000	2,660,005	1,918,393
Operating surplus (deficit)	(3,077,482)	(2,351,330)	(254,913)	(3,077,482)	(2,351,330)	(254,913)
Net finance costs	17,653	12,600	36,095	17,653	12,600	36,095
<b>Net surplus (deficit) for the period</b>	<b>(3,095,135)</b>	<b>(2,363,930)</b>	<b>(291,008)</b>	<b>(3,095,135)</b>	<b>(2,363,930)</b>	<b>(291,008)</b>

# Income Statement

For the Period Ended March 31, 2017

	Quarter 1 2017			Year To Date		
	Actual	Budget	PY	Actual	Budget	PY
<b>1. Income</b>						
Grants, subsidy & contribution income	5,675,000	5,674,998	5,425,000	5,675,000	5,674,998	5,425,000
Tourism authority fee	804,970	705,342	351,223	804,970	705,342	351,223
	<u>6,479,970</u>	<u>6,380,340</u>	<u>5,776,223</u>	<u>6,479,970</u>	<u>6,380,340</u>	<u>5,776,223</u>
<b>2. Direct costs:</b>						
Sales & Marketing	6,661,111	5,153,037	3,470,733	6,661,111	5,153,037	3,470,733
Product development & experience	425,350	610,878	561,431	425,350	610,878	561,431
Research & business intelligence	95,311	172,250	21,522	95,311	172,250	21,522
Operations	108,967	120,500	38,157	108,967	120,500	38,157
Investment	2,713	15,000	20,900	2,713	15,000	20,900
	<u>7,293,451</u>	<u>6,071,665</u>	<u>4,112,743</u>	<u>7,293,451</u>	<u>6,071,665</u>	<u>4,112,743</u>
<b>3. Structure, general &amp; administration costs, split:</b>						
Staff costs	1,653,863	1,685,014	1,383,436	1,653,863	1,685,014	1,383,436
Communications & IT	89,239	140,712	127,033	89,239	140,712	127,033
General expenses	204,439	214,294	168,047	204,439	214,294	168,047
Marketing	943	3,150	3,669	943	3,150	3,669
Premises	186,002	186,661	188,615	186,002	186,661	188,615
Professional fees	38,074	102,550	43,489	38,074	102,550	43,489
Transport	443	375	454	443	375	454
Grants / Investments	80,000	320,000	-	80,000	320,000	-
Capital expenditure	10,997	7,250	3,651	10,997	7,250	3,651
	<u>2,264,000</u>	<u>2,660,005</u>	<u>1,918,393</u>	<u>2,264,000</u>	<u>2,660,005</u>	<u>1,918,393</u>
<b>4. Finance costs:</b>						
Interest	(74)	-	(41)	(74)	-	(41)
Bank charges	7,983	6,750	7,726	7,983	6,750	7,726
Credit card charges	585	3,350	814	585	3,350	814
Foreign exchange	9,159	2,500	27,597	9,159	2,500	27,597
	<u>17,653</u>	<u>12,600</u>	<u>36,095</u>	<u>17,653</u>	<u>12,600</u>	<u>36,095</u>

# Balance Sheet

For the Period Ended March 31, 2017

ASSETS	<u>Mar-17</u>
<b>Current Assets</b>	
Cash & Bank	1,585,533
Accounts Receivable	208,578
Inventory	11,856
Accrued Income	295,530
Prepaid Expenses	257,485
Deferred Costs	10,000
Total Current Assets	<u>2,368,982</u>
Non-current Assets	185,690
<b>Total Assets</b>	<u><u>2,554,672</u></u>
<b>EQUITY &amp; LIABILITIES</b>	
<b>Equity</b>	
Accumulated Surplus (Deficit)	1,964,745
Net Income	(3,095,135)
	<u>(1,130,390)</u>
<b>Liabilities</b>	
<b>Current Liabilities</b>	
Vendor Payables	3,367,639
Accruals	317,423
Deferred Income	-
	<u>3,685,062</u>
<b>Total Equity &amp; Liabilities</b>	<u><u>2,554,672</u></u>

*Out There*

HAS ITS OWN MYSTIQUE.

BERMUDAΔ