



# Bermuda Tourism Summit 2015

Calling all Explorers, Partners & Believers

## Digging Into Data

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## Bermuda Tourism Key Performance Indicators





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## 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

Management  
Metrics

Organizational  
Performance  
Measures

Destination/  
Market  
Performance



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## Measuring Destination/Market Performance

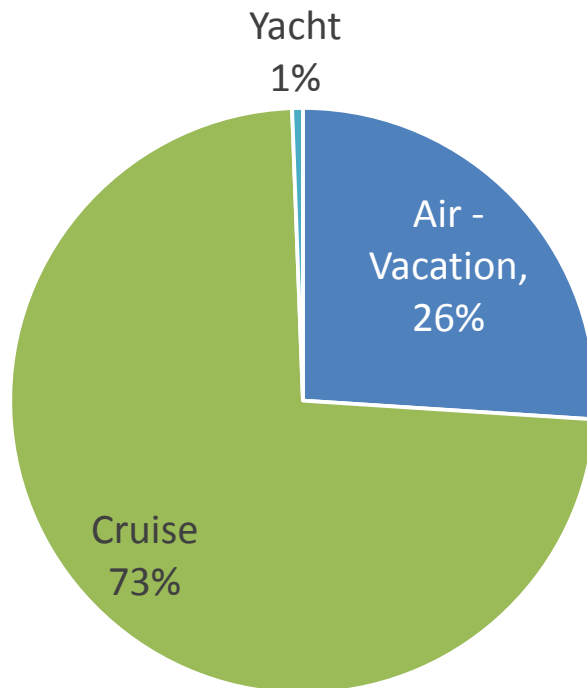
- Visitor arrival data tracks Air visitor arrivals – who, where, when, for how long?
- Air and Cruise Exit surveys track –
  - Visitor expenditure
  - Visitor satisfaction
  - Use and satisfaction with Visitor Information Services
- Hotel data from STR tracks ADR, RevPAR and occupancy
- Hotel data from 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



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## Vacation Visitor Arrivals – Jan-Sept 2015

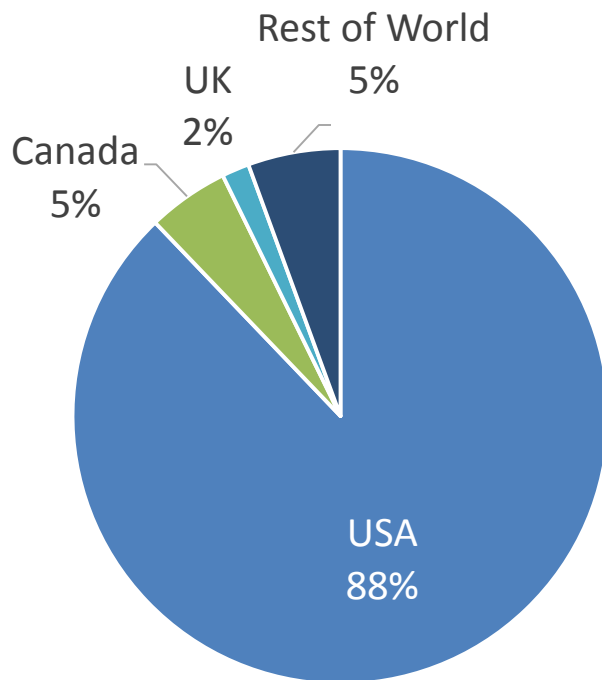


Arrivals	YTD 2015
Air - Vacation	116,700
Cruise	329,100
Yacht	2,656
<b>Total</b>	<b>448,456</b>

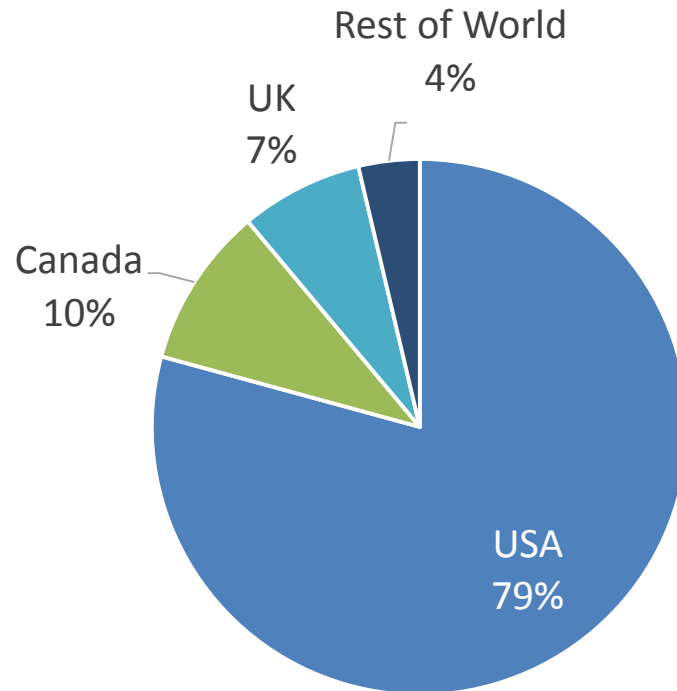


## Visitor Arrivals – Country of Origin (Jan-Sept 2015)

### Cruise Visitors Year To Date



### Air Vacation Visitors Year To Date

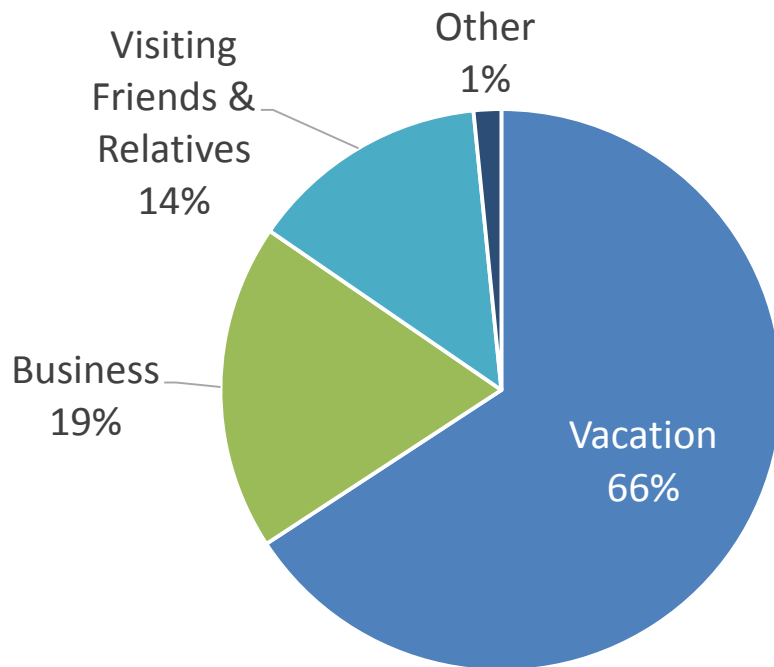




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## Air Visitor Arrival Statistics (Jan-Sept 2015)



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

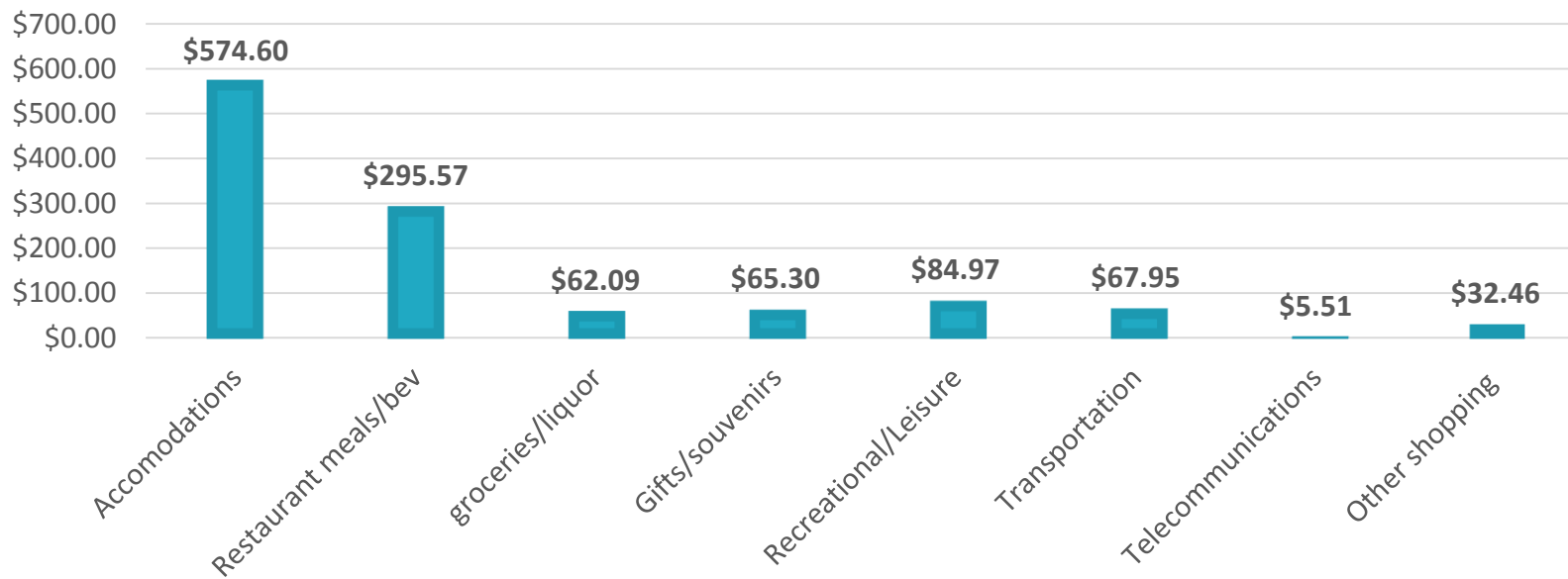


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## Air Visitor Expenditure

Average Spending per person	YTD 2015
Vacation Visitors	\$1,291.36
Business Visitors	\$1,232.87
Total Average	\$1,188







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to hear from

*you!*

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**Bill O.**

London, England

**Trip for 2 to Bermuda**

(includes airfare and 3-night  
stay at Newstead Belmont  
Hills Hotel)

**Bermuda Visitor Panel**

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

[JOIN](#)



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## Recent Topics

- Transportation – taxis, buses, ferries
- Public Beaches
- Nightlife/Entertainment
- National Service Standards
- Rental Cars
- Golf



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## 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



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## 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.



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## 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*



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## 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.*

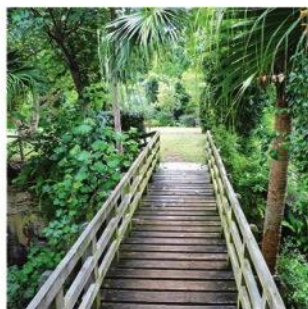


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## Exit Surveys – What are they used for?

- 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.

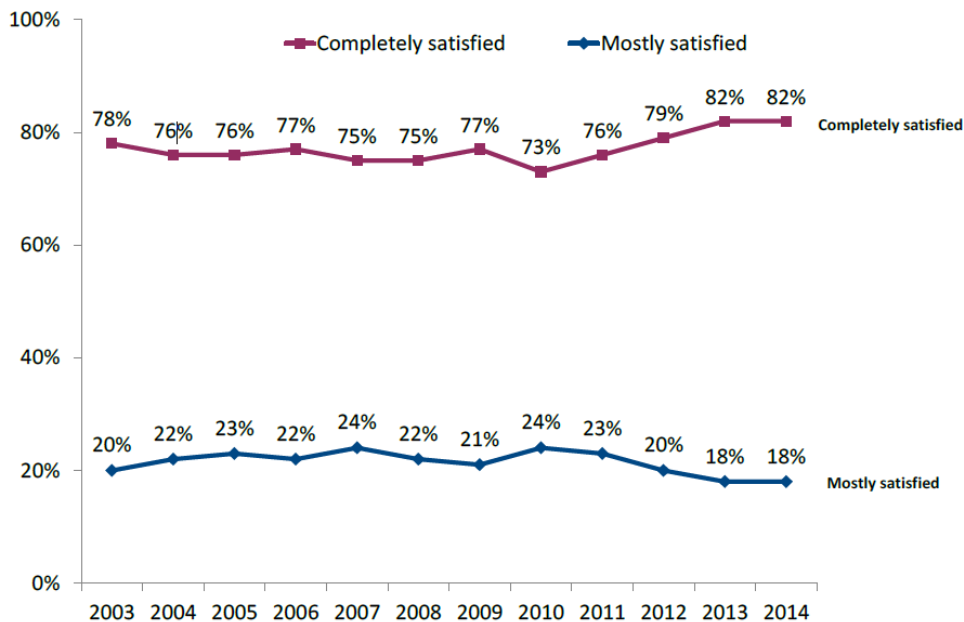




## Exit Survey – Trending

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:

**Level of Satisfaction With 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.



## Exit Surveys – Visitor Expectations vs. Satisfaction

Factor	Gap
Affordability of Bermuda	-12%
Cuisine/Dining Experience	-9%
Water activities	-9%
Personal Safety	-6%
Types of recreation activities	-5%
Quality of recreation	-4%
Hospitality	-3%
Shopping	-2%
Cultural/Historical	-2%
Type & Quality of Sporting activities	-2%

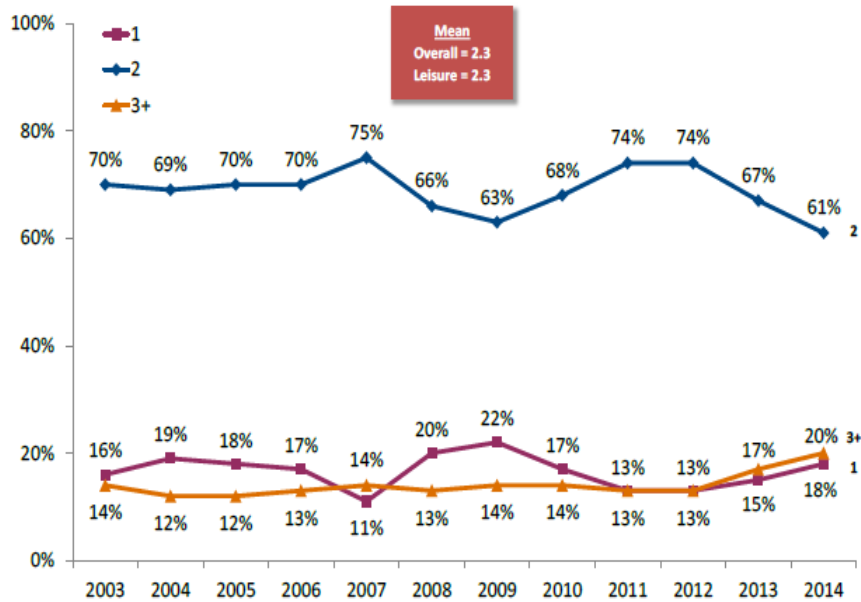
A gap analysis provides an estimate of the proportion of visitors who considers a factor to be critically important, but who are not completely satisfied with the performance of the destination visited with regard to each specific factor evaluated. It is meant to display which factors should be focused on to best increase total satisfaction.

The higher the percentage, the larger the gap in meeting the visitors' needs.

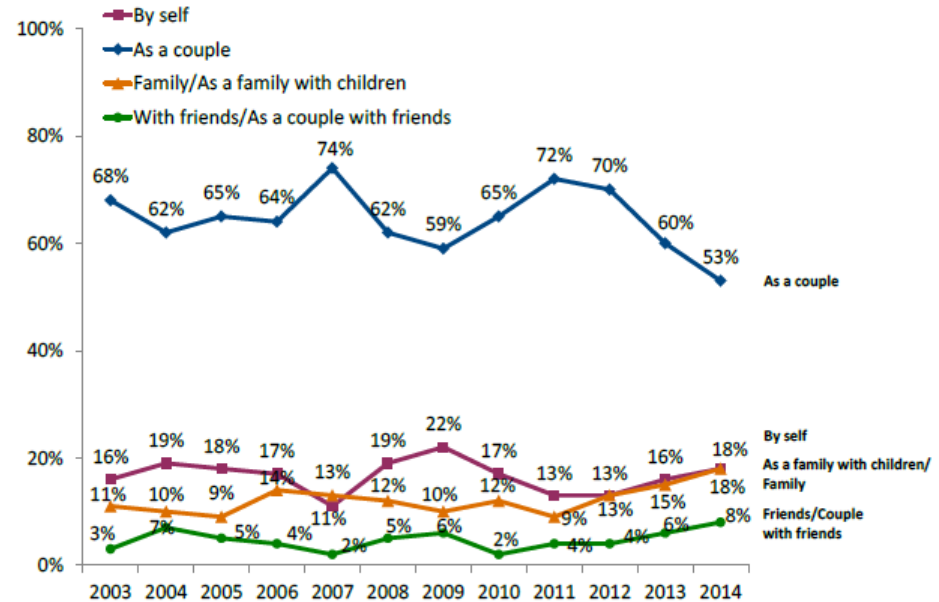


## Air Exit Surveys 2014 – Party Composition

### Leisure Travel Party Size

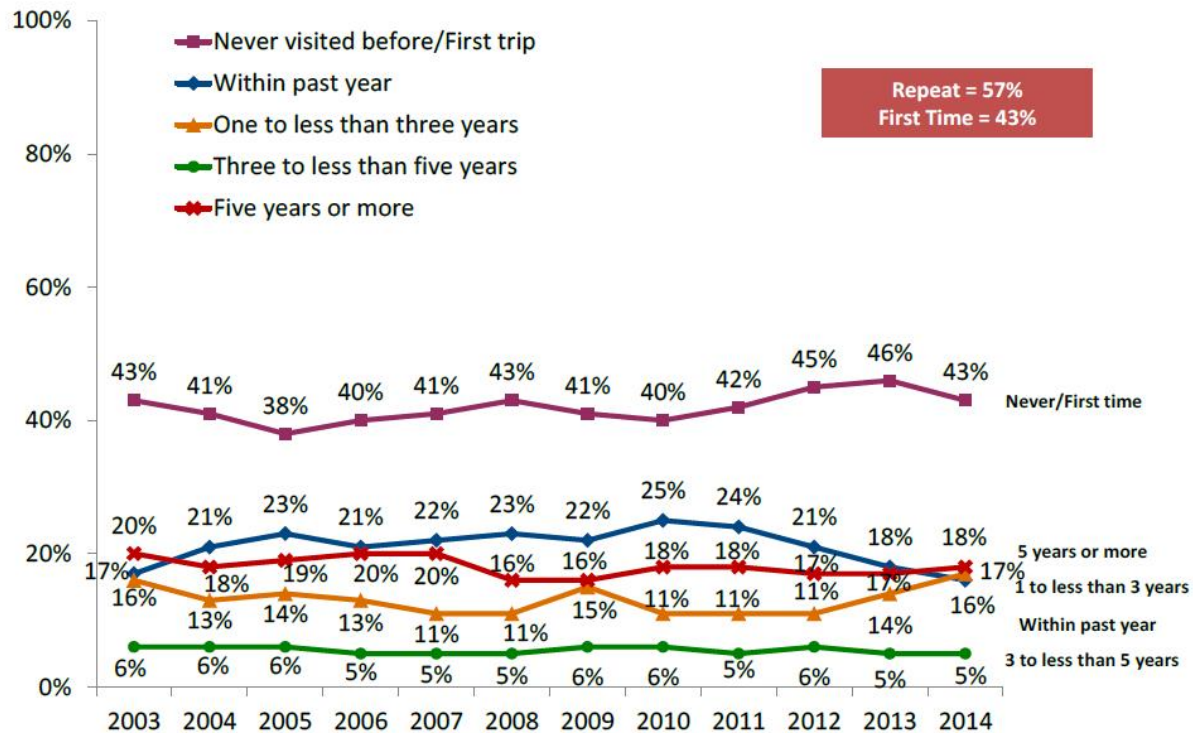


### Composition of Leisure Travel Party



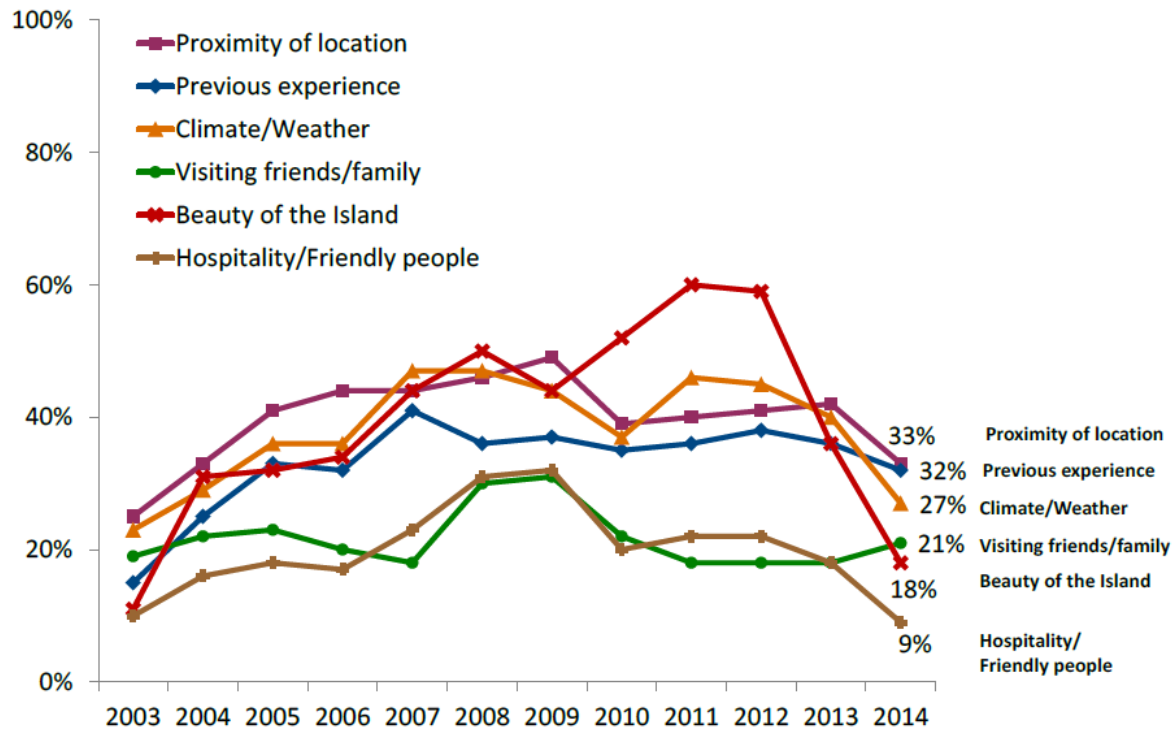


## Air Exit Surveys 2014 – Previous Visitation





## Air Exit Surveys 2014 – Key Factors in Choosing Bermuda

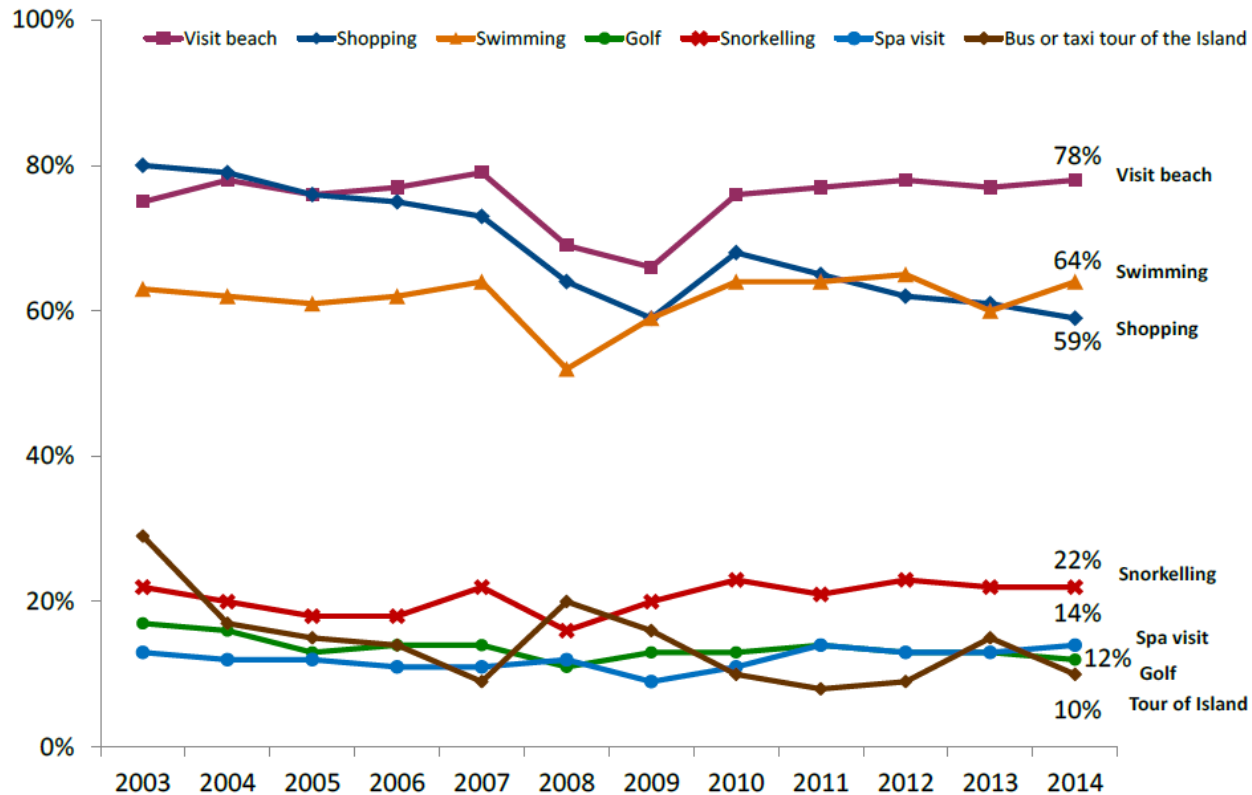




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## Air Exit Surveys 2014 – Participation in Leisure Activities

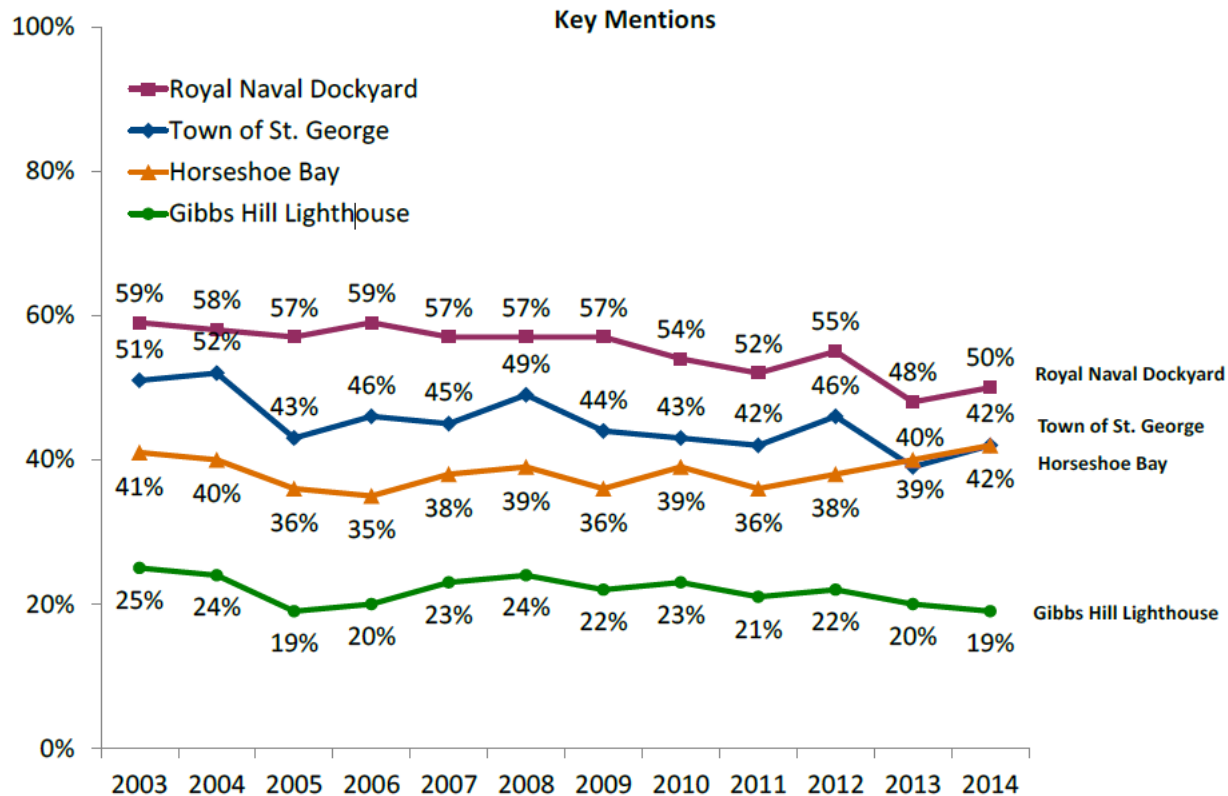




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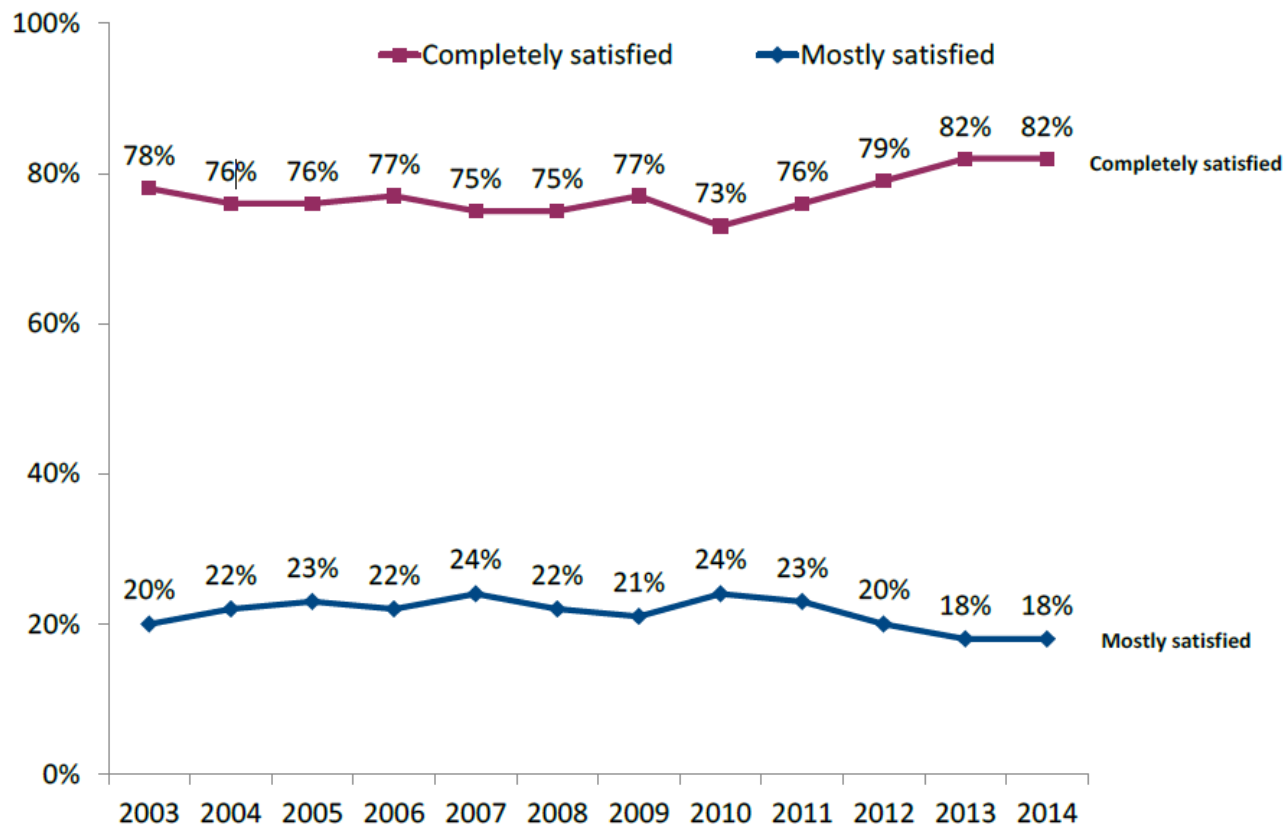
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## Air Exit Surveys 2014 – Key Attractions Visited





## Air Exit Surveys 2014 - Satisfaction







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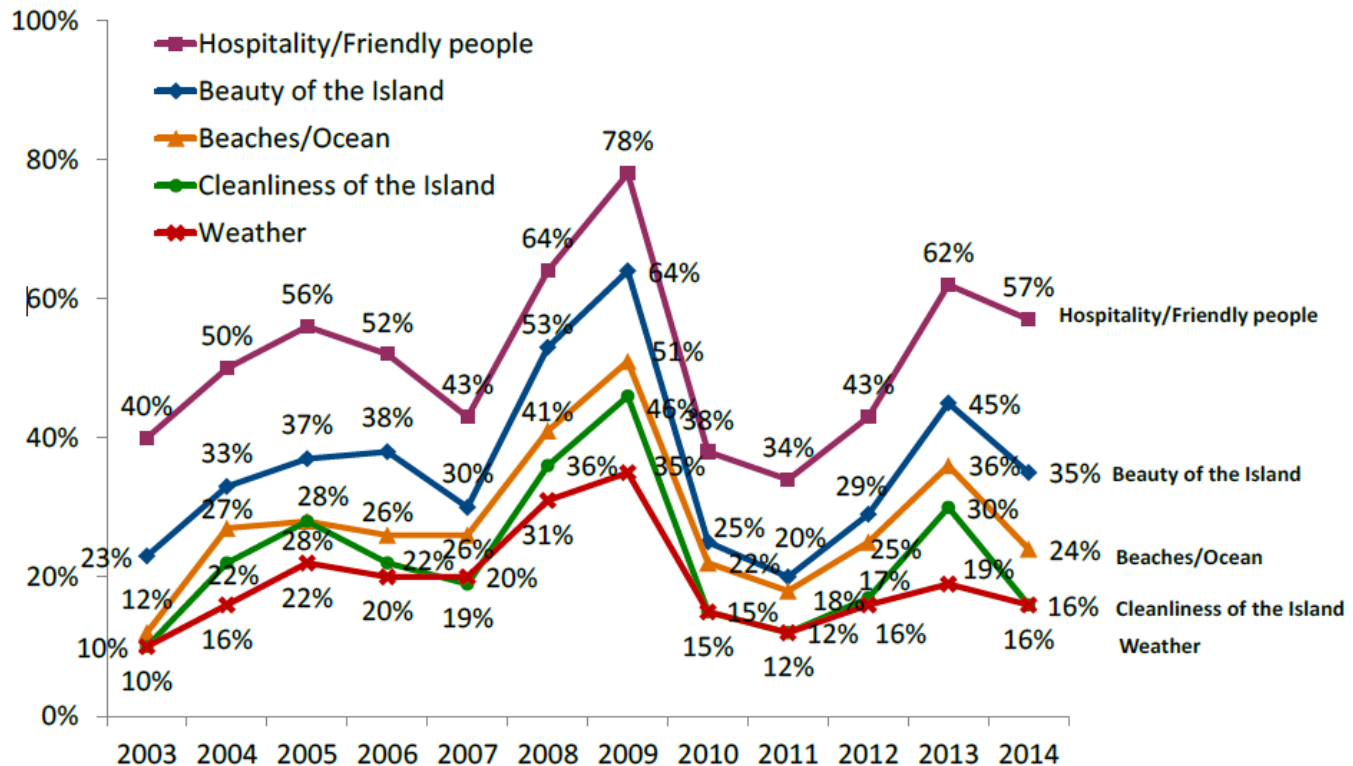
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## Air Exit Surveys 2014 – Satisfaction with Key Attributes



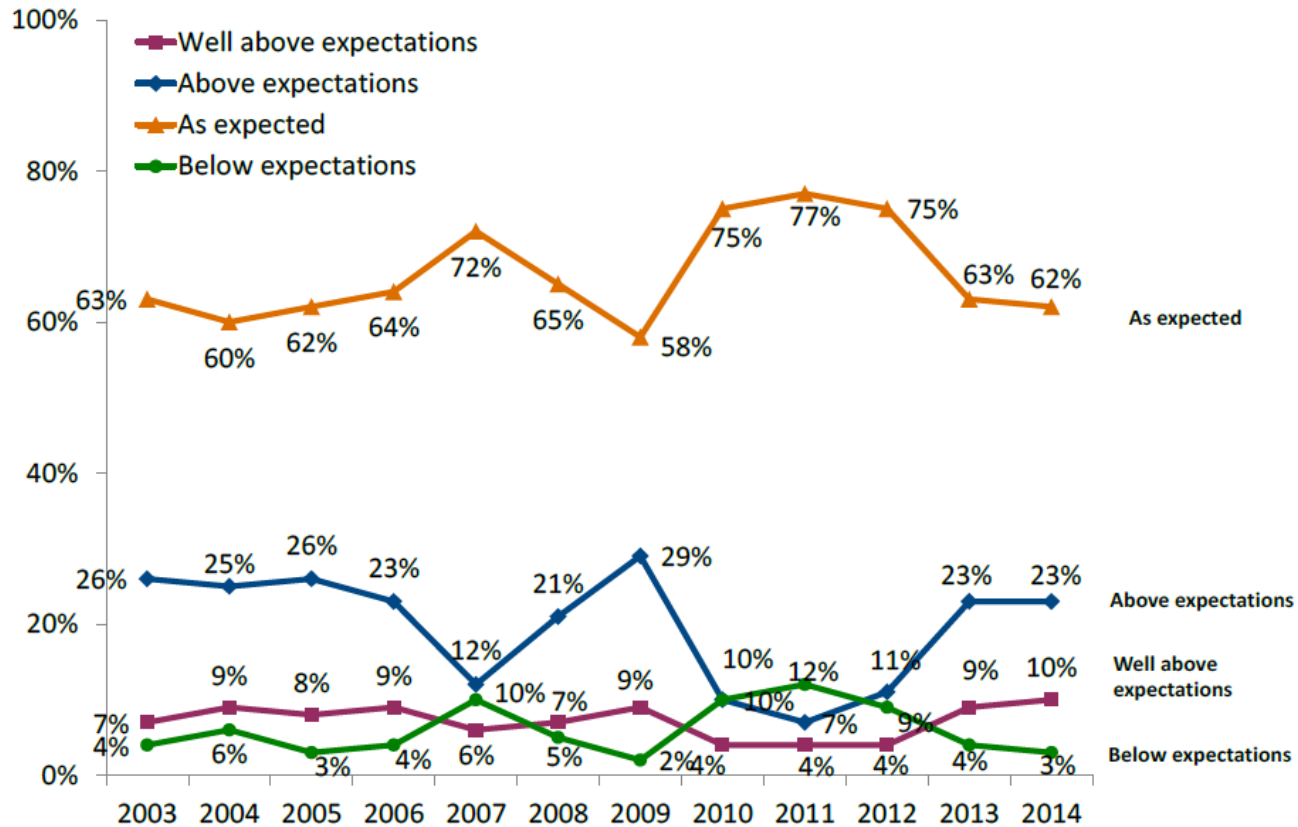


## Air Exit Surveys 2014 – Exceeding Expectations





## Air Exit Surveys 2014 – Value

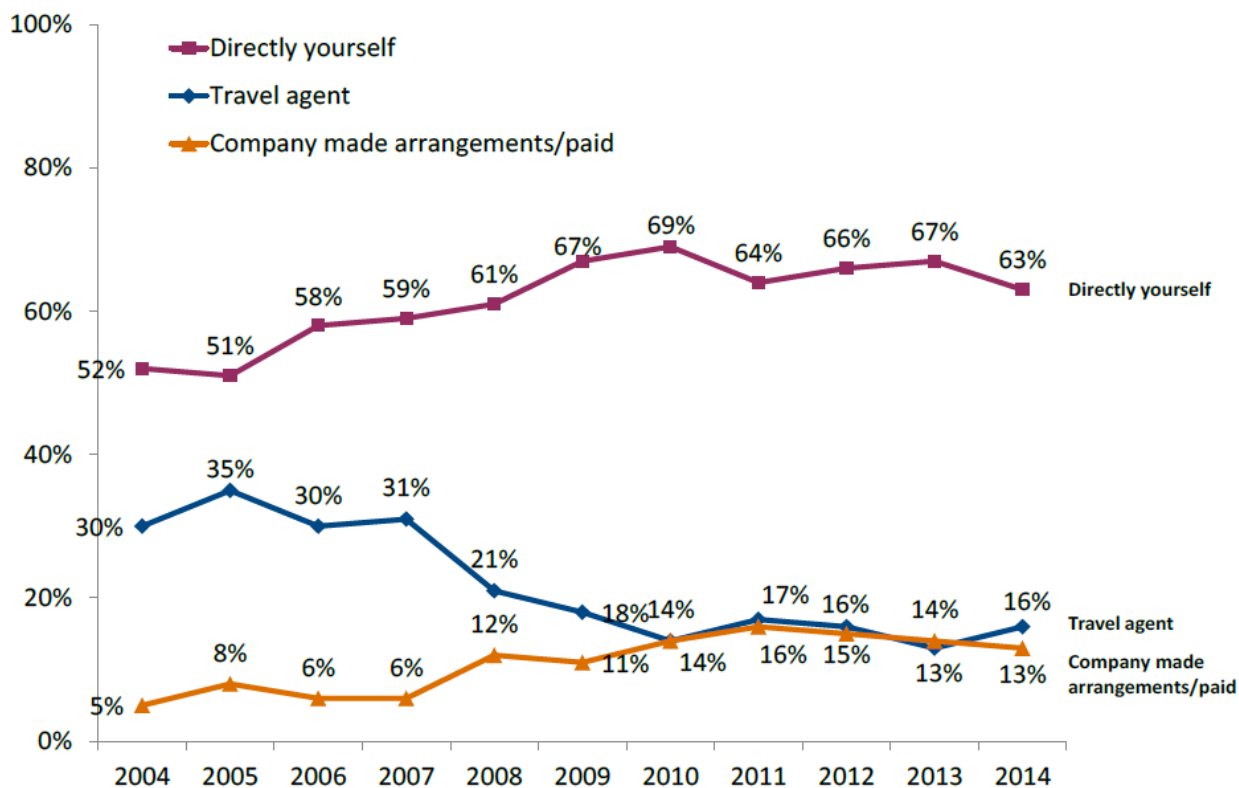




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## Air Exit Surveys 2014 – Booking Trends

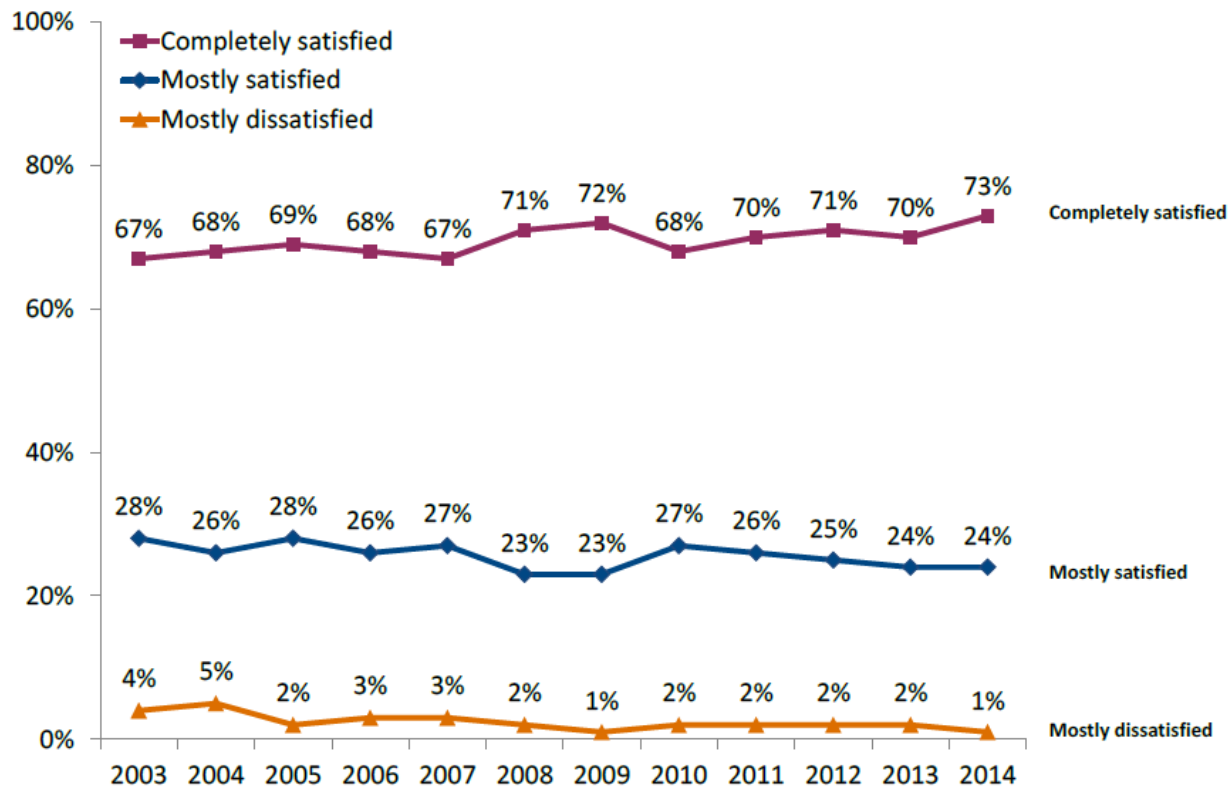




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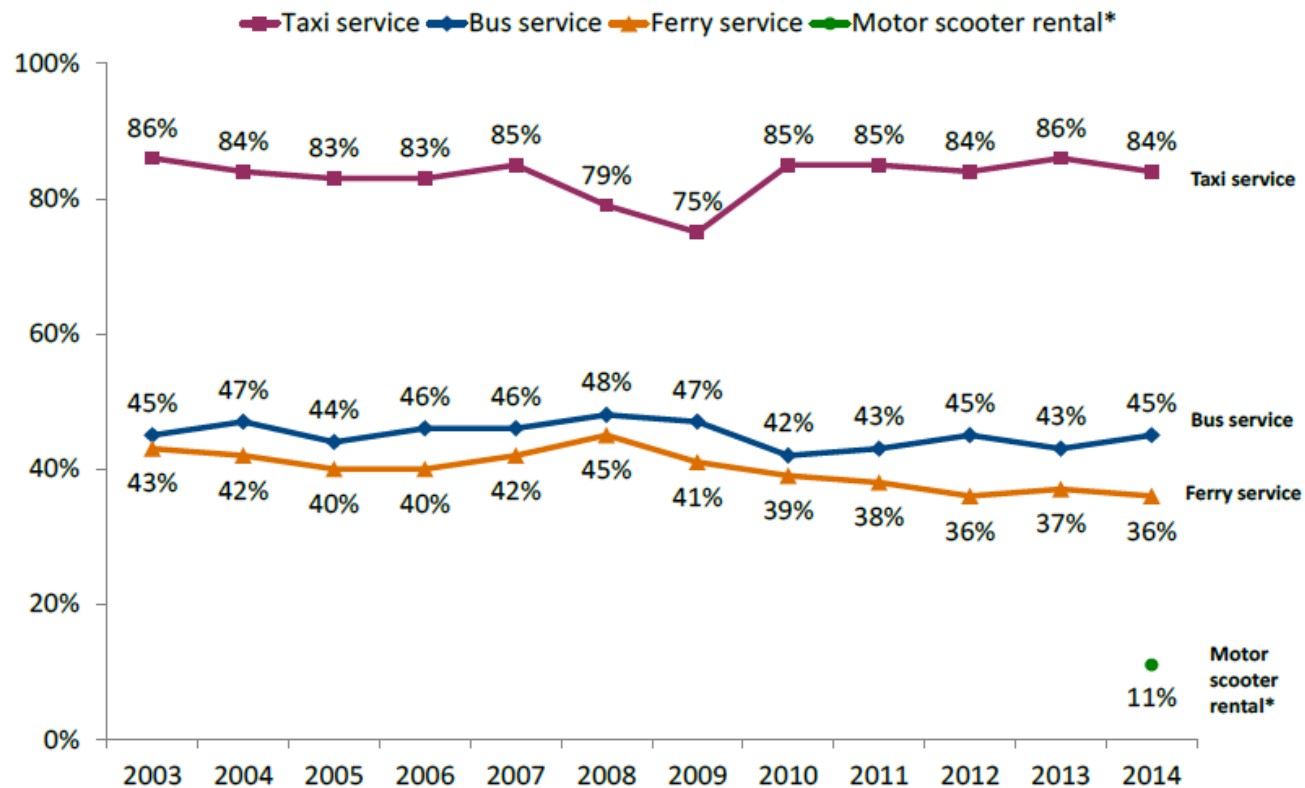
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## Air Exit Surveys 2014 – Accommodation Satisfaction



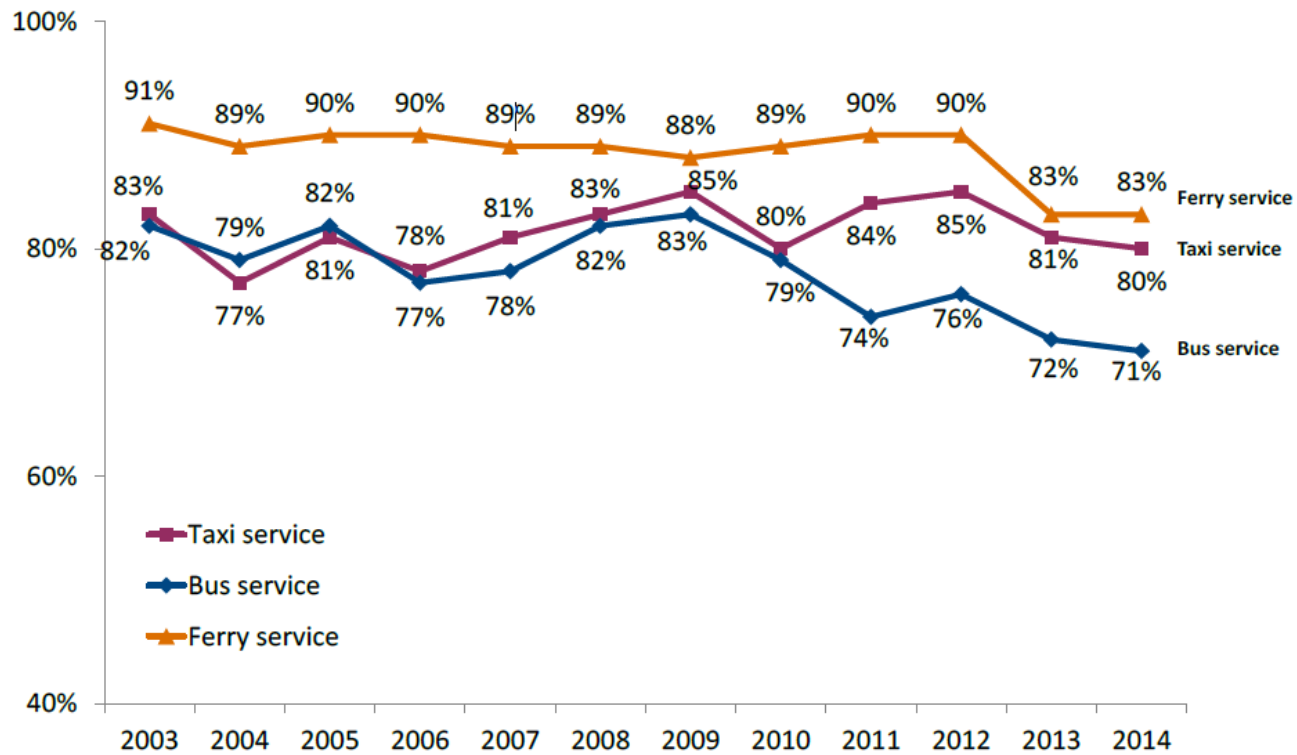


## Air Exit Surveys 2014 – Modes of Transportation





## Air Exit Surveys 2014 – Satisfaction with Transportation

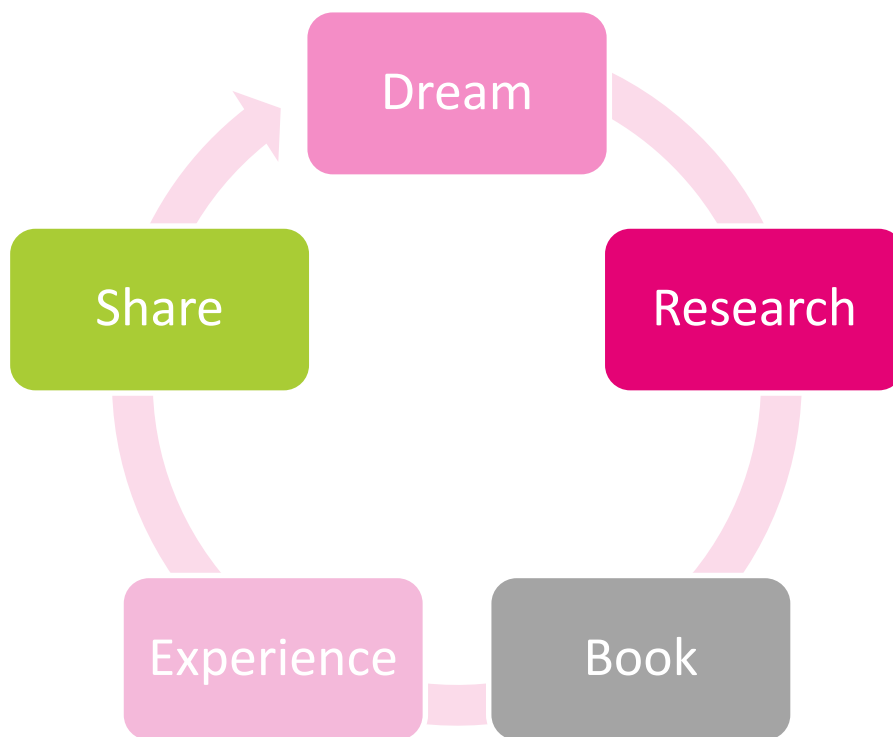




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## Research in the Travel Cycle







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## 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

One in ten  
US adults are  
interested in  
visiting  
within the  
next two  
years

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



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## 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



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## Online Searches & Bookings for Hotels

3<sup>rd</sup> 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?



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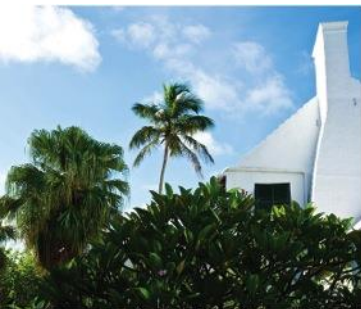
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## Searches for Hotels

Rank by Share	2015 YTD	% of share Chg YOY
#1	New York	+60%
#2	Boston	+124%
#3	Washington DC	+118%
#4	Philadelphia	+129%
#5	Atlanta	+130%
#6	Chicago	+87%
#7	San Jose, CA	+102%
#8	Bridgeport/Stamford, CT	+85%
#9	Los Angeles	+30%
#10	Baltimore	+41%
#11	San Francisco, CA	+54%
#12	Hartford, CT	+92%
#13	Toronto	+1%
#14	Pittsburgh	+137%
#15	Providence, RI	+33%

## Bookings for Hotels

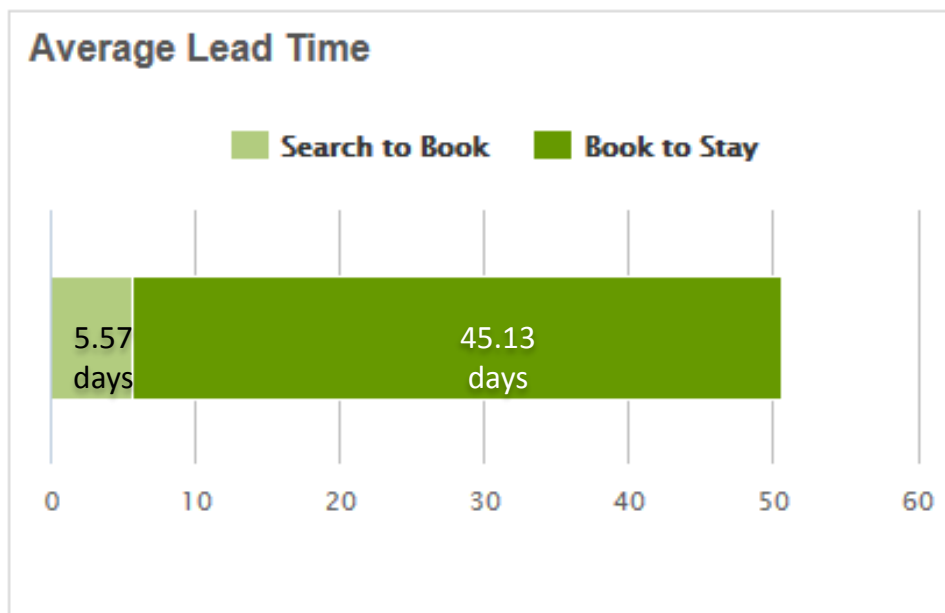
Rank by Share	2015 YTD	% of share Chg YOY
#1	New York	+3%
#2	Boston	+12%
#3	Washington DC	+5%
#4	Philadelphia	+7%
#5	Toronto	-0%
#6	Bridgeport/Stamford, CT	-4%
#7	Chicago	-3%
#8	Los Angeles	-24%
#9	San Francisco	+14%
#10	Baltimore	-2%
#11	Providence, RI	+0%
#12	Atlanta	+5%
#13	Hartford, CT	+15%
#14	Dallas, TX	-8%
#15	Miami	+2%



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## Average Lead Time for US



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



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## 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

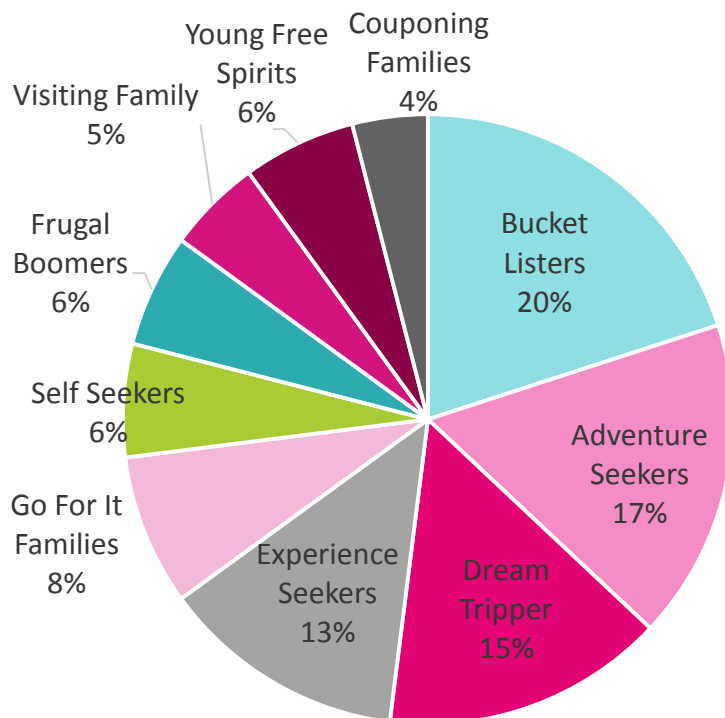


### Adventure Seekers

- 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



Persona	% of share Change YOY
Bucket Listers	+33%
Adventure Seekers	+28%
Dream Trippers	+27%
Experience Seekers	+26%
Go For It Families	+23%
Frugal Boomers	+18%
Self Seekers	+15%
Young Free Spirits	+13%
Visiting Family	+15%
Couponing Families	+19%





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