

Bermuda Traveler Portrait & Trends

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#BDAPartnershipSummit

BERMUDA PARTNERSHIP SUMMIT 2025

Presentation:

Traveler Portrait & Trends

What is Business Intelligence?

This team ensures the Bermuda Tourism Authority is well informed and responsive to its market. They provide consumer demand and behavior research and intelligence to enable the BTA's Experience and Sales & Marketing teams to better develop strategically targeted plans. Its responsibilities include the following:

- Compilation of tourism statistics including (ie air/cruise/yacht arrivals/ accommodation) into reporting for stakeholders (including the public)
- Management of the visitor arrival cards
- Undertake market and product research
- Manage the Exit Survey Process
- Manage the BTA's internal performance scorecard

How do we know what types of travelers come to Bermuda?

Visitor Arrival Cards

- Provides Demographic Data
- This data is aggregated to show useful attributes of visitors
- Also available online at bermudaarrivalcard.com

Exit Surveys

- Provides Visitor Profile information and Feedback
- Allows us to understand decision making and visitor preferences/satisfaction

BERMUDA

Thank you for your recent visit to Bermuda. Please take a moment to share your feedback with the Bermuda Tourism Authority.

The survey will take approximately 15 minutes. Please click "Next" to begin the survey.

This study is administered by Narrative Research Bermuda, an independent marketing research firm. Your answers to the survey will remain confidential and will be aggregated with other responses received. For more information on Narrative Research Bermuda's privacy policy, please click here: [Privacy Policy](#)

If you are on a mobile device (smartphone or tablet), we recommend rotating your device.



BERMUDA

Go to bermuda.com

GOVERNMENT OF BERMUDA

Department of Immigration

Passenger Arrival Form

Fill your card out online at

Or scan QR Code:

bermudaarrivalcard.com

Please complete the following in clear block letters: (in blue/black ink)

LAST NAME

Middle Initial

FIRST NAME

M

F

Country of Citizenship/Nationality

Passport Number

Passport Expiration Date

M

M

D

D

Y

Y

Y

Y

Email

☒ YES, Please add me!

☐ NO

I consent to Bermuda Tourism contacting me about special offers, promotions and information about Bermuda Tourism and its selected partners. All data will be held and processed in accordance with our privacy policy

Date of Birth

Date of Arrival

Flight #

M

M

D

D

Y

Y

Y

Y

M

M

D

D

Y

Y

Y

Y

Home Address

Number/Street Name/Unit

City/Parish

State/Province/County

Country

Zip/Postal Code

First Trip to Bermuda

☒ Y

☐ N

Intended Stay # Nights

Primary Purpose of Visit

(pick one)

Vacation

Destination Wedding

Sports Events/Training

Concert/Festival/Carnival

Incentive

Other

Business

Conference/Meeting

Visiting Family & Friends Vacation

Visiting Family & Friends Personal

Study

Accommodation

(pick one)

Hotel Property Name or Residential Address

Hotel or Similar

Friend/Family

Rental House/Apartment

Bed & Breakfast/Guesthouse

Owned Fractional Unit/Condo/Home

Other

Signature

*Please refer to the back of your card for more information

What does the arrival form tell us?

The visitor Card provides an overview of the following on our visitors:

- Country of Origin
- Home Address (i.e., location)
- Intended Address – hotel, vacation rental, private home
- Purpose of Visit – leisure, business, visiting friends and relatives
- Length of Stay
- Mode of Arrival (generally airline)
- Age

Statistics shown are YTD January through August for total travelers unless stated otherwise.

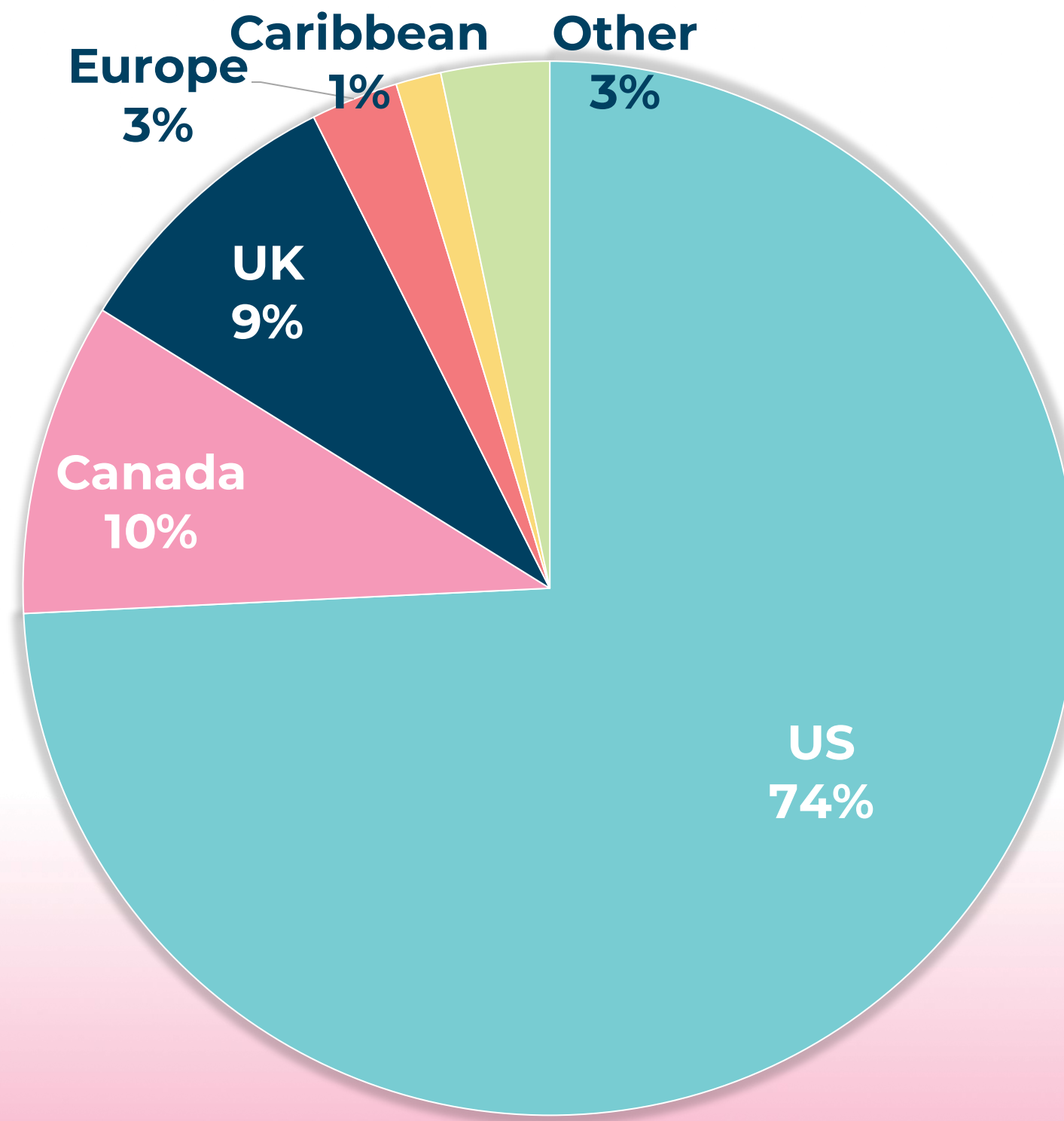
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Where do our Visitors come from?

The visitor card data allows us to see what city and even postal code visitors are coming from.

- As it relates to consolidated results arrivals from our core markets can be broken down by City/Town, including postal codes.
- For US travelers they can be attributed to a Designated Market Area (DMA).
- The DMA is crucial for our marketing team and partners to understand where arrivals are concentrated, shifts in demand and how to push out advertising more effectively.

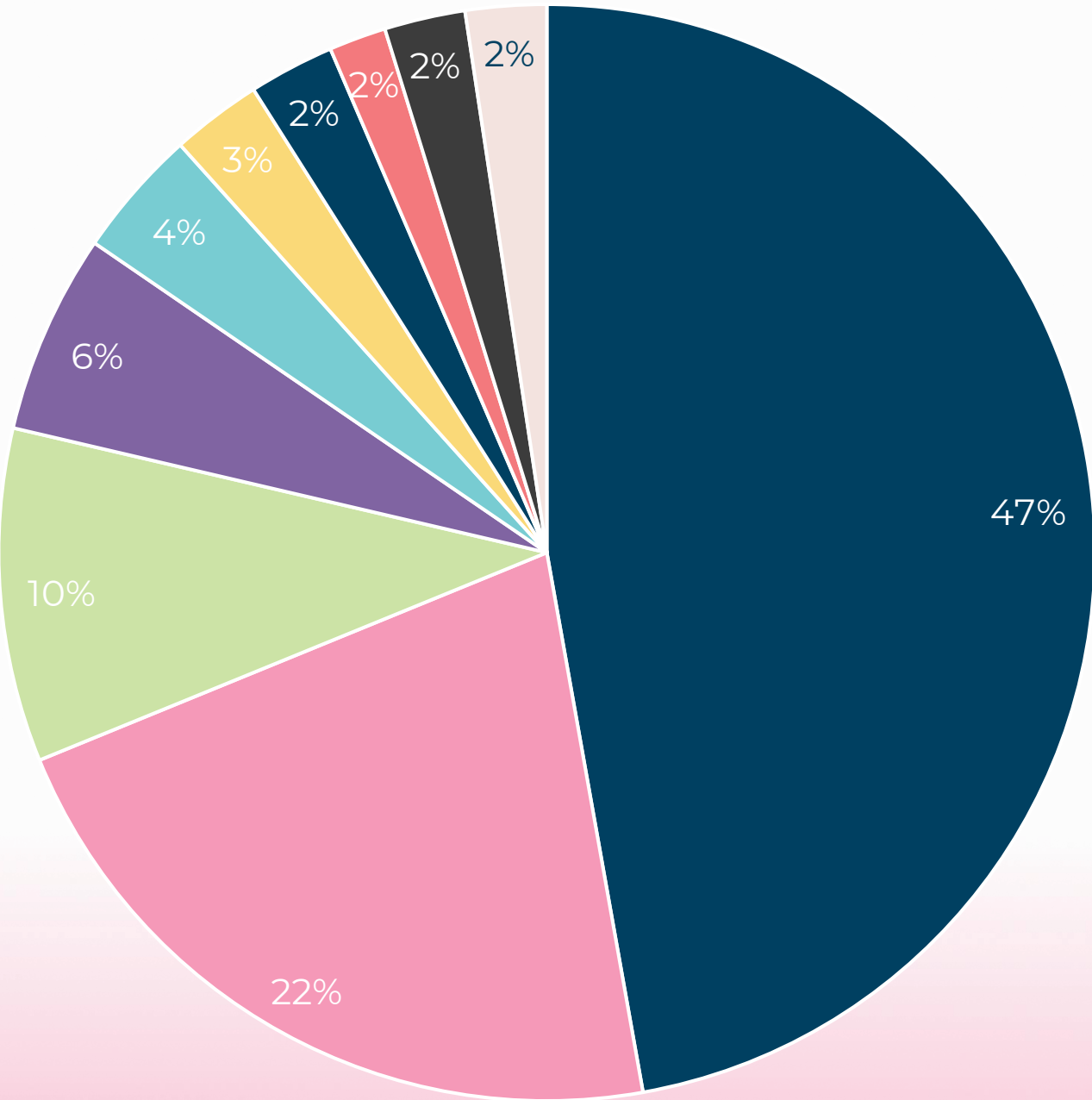
Where do our Visitors come from?



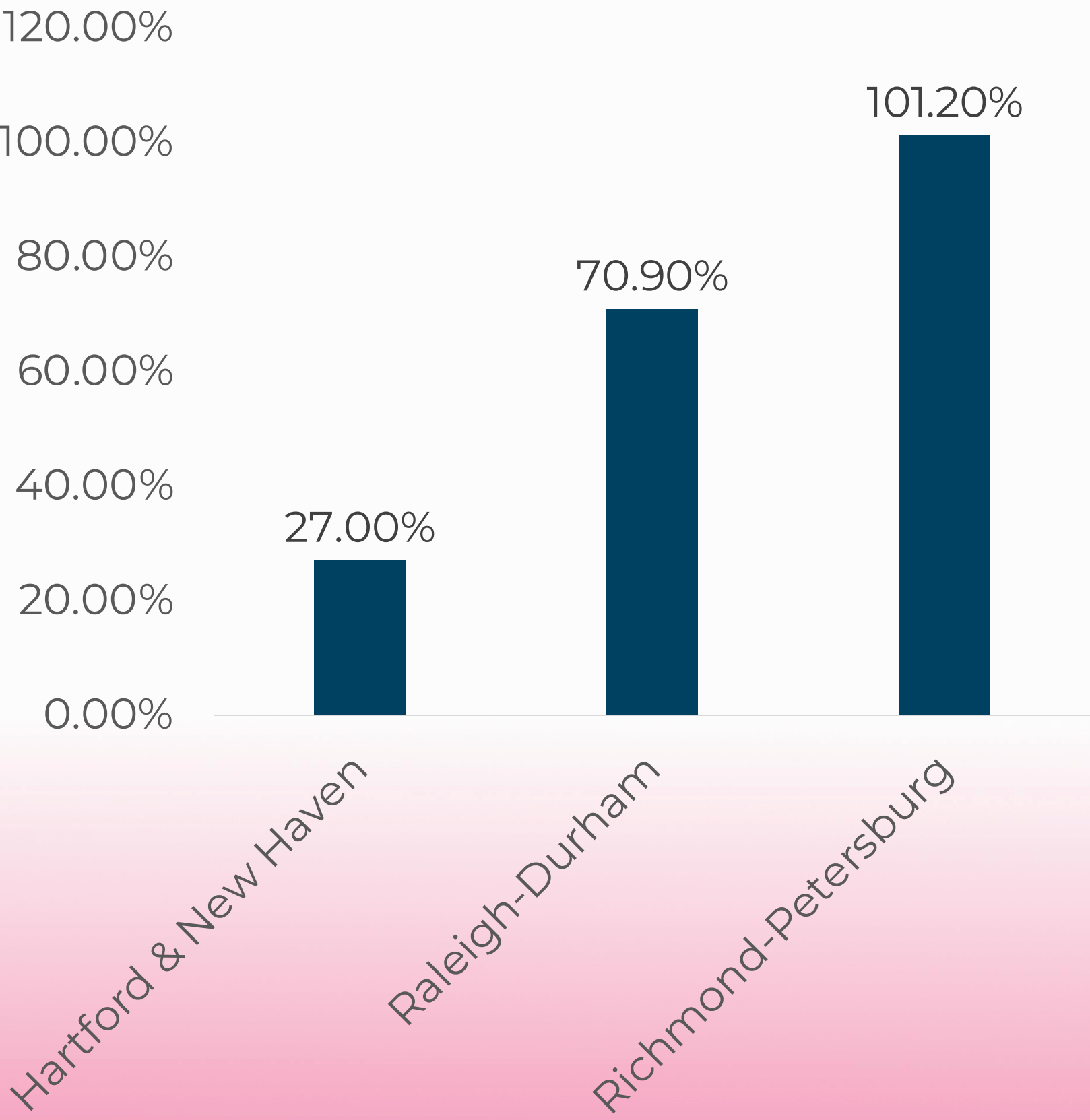
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US Leisure Air Visitors by DMA

- New York
- Boston
- Philadelphia
- Washington, DC
- Hartford & New Haven
- Providence-New Bedford
- Raleigh-Durham
- Richmond-Petersburg
- Baltimore
- Atlanta

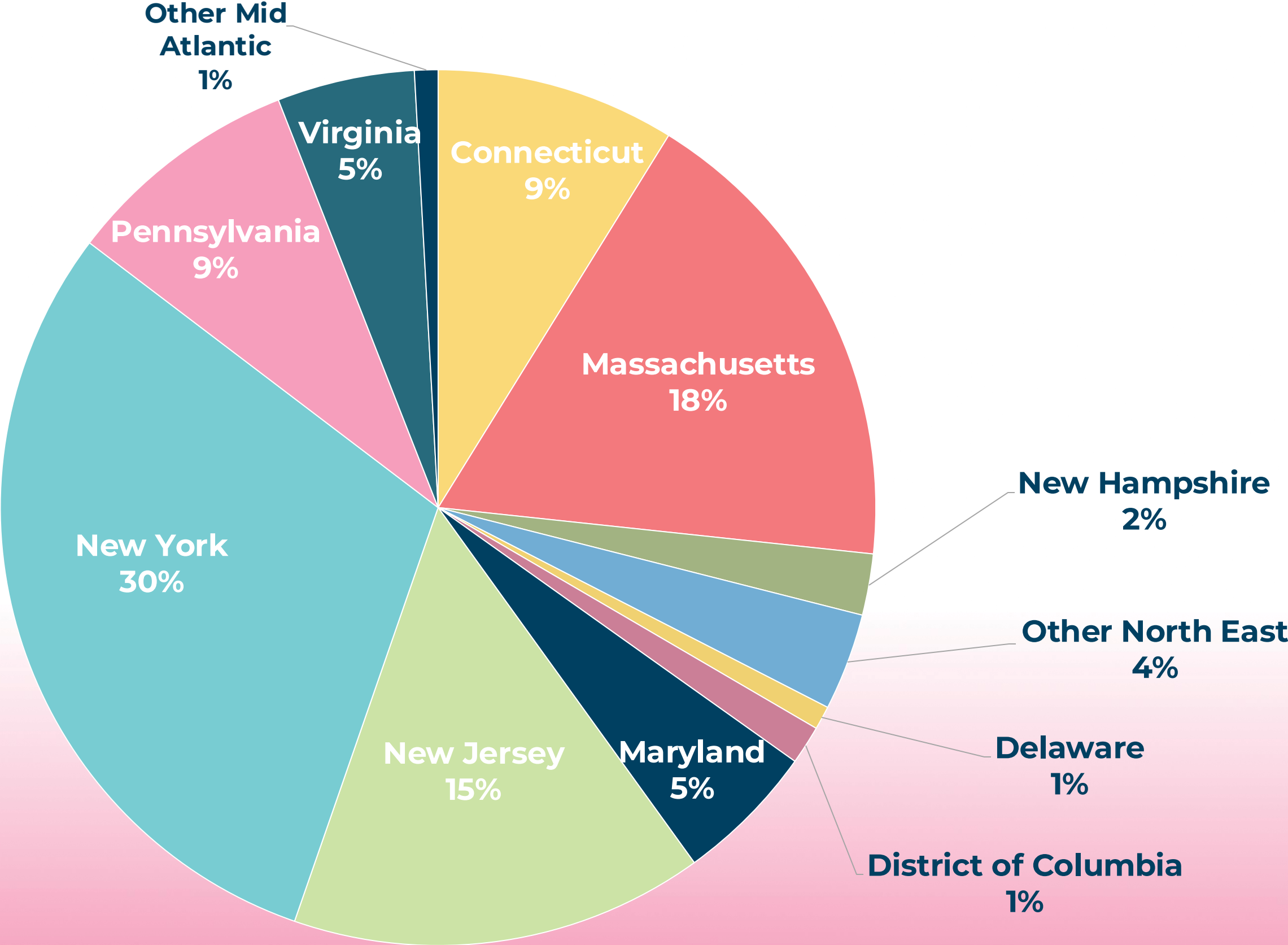


Large Increases Year-Over-Year

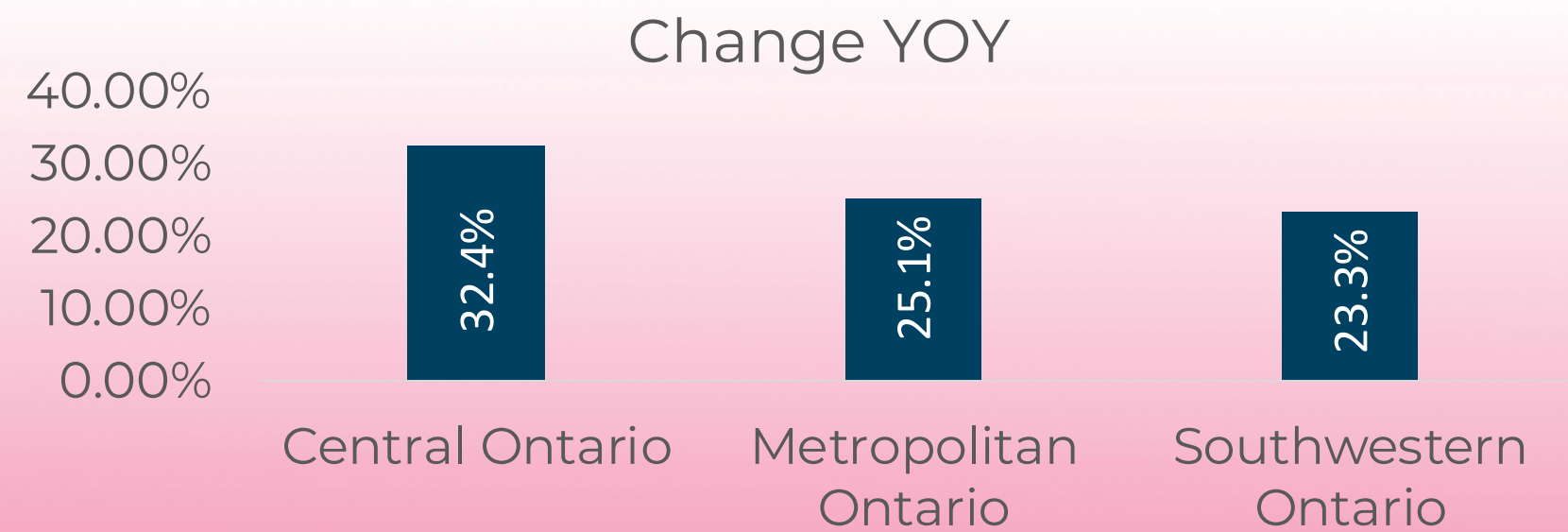
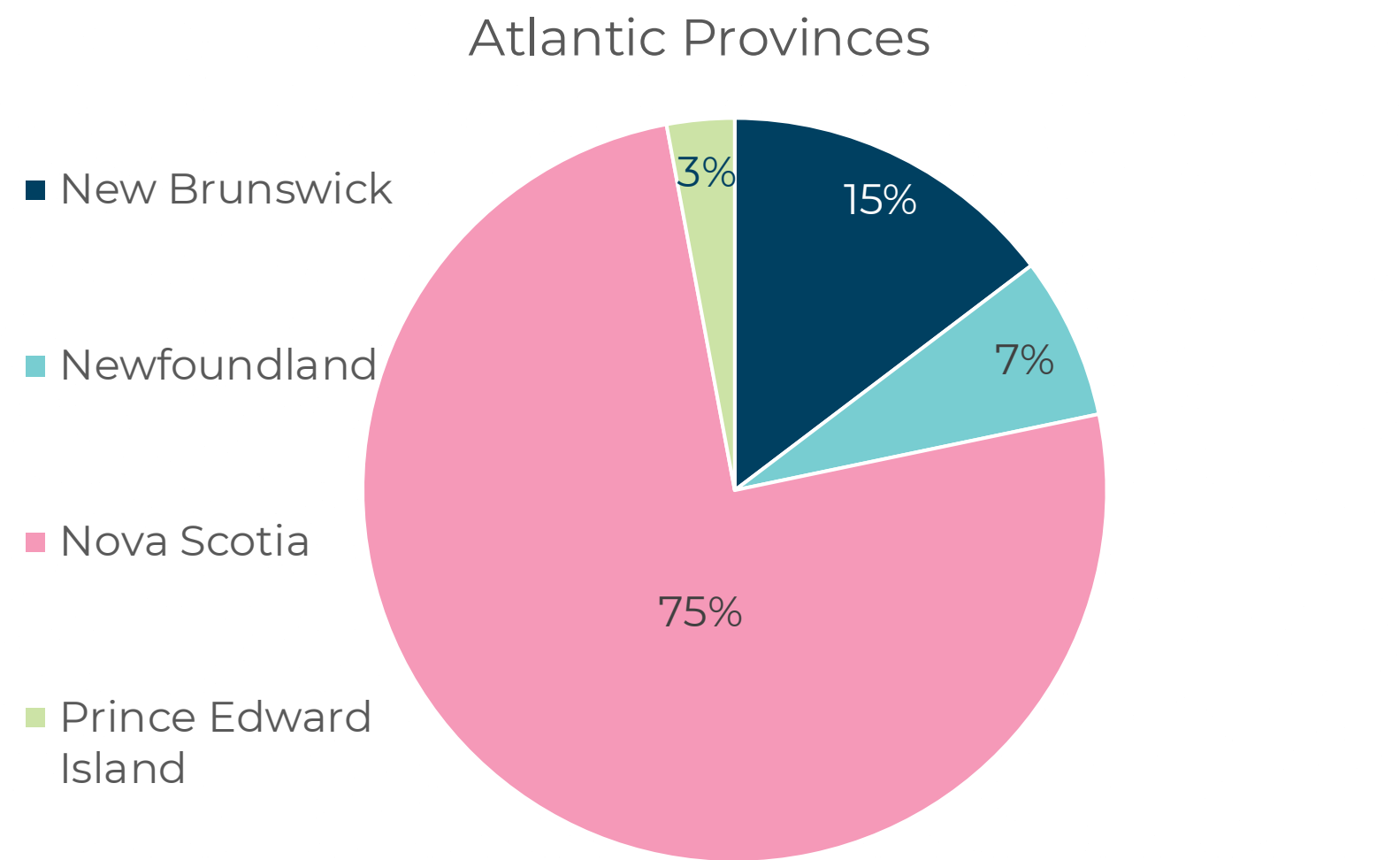
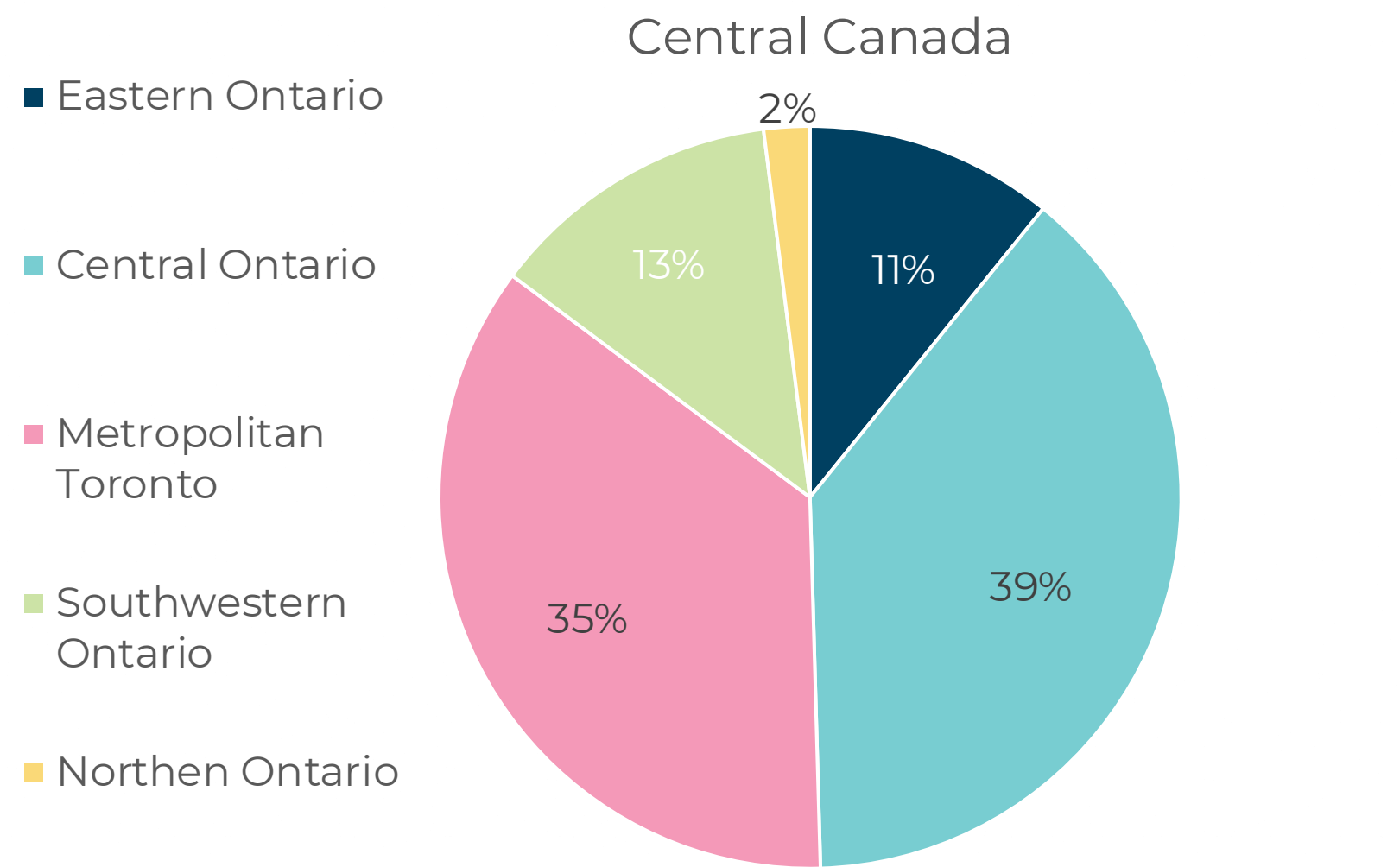


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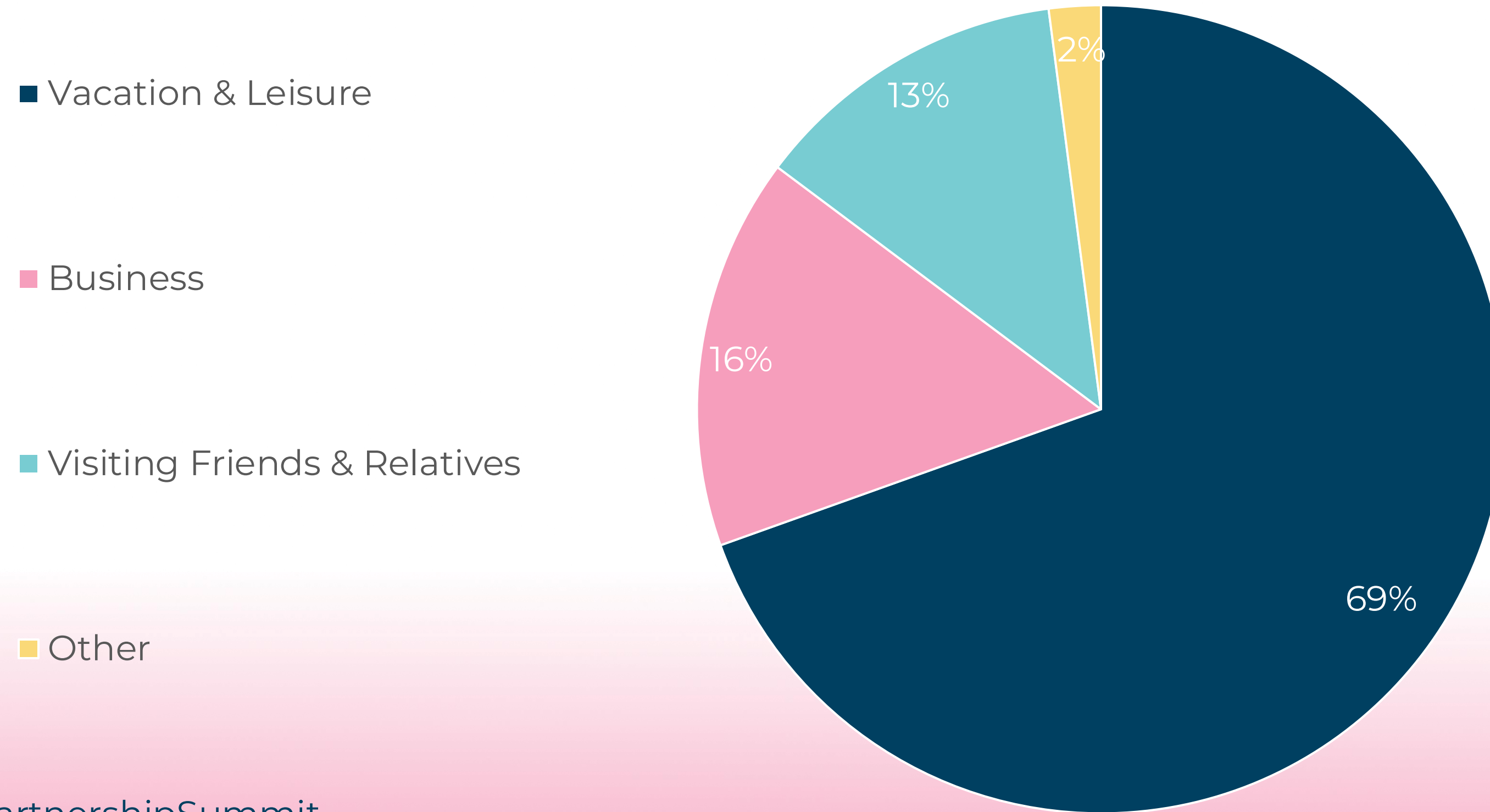
US East Coast Visitors by State



Canadian Air Visitors

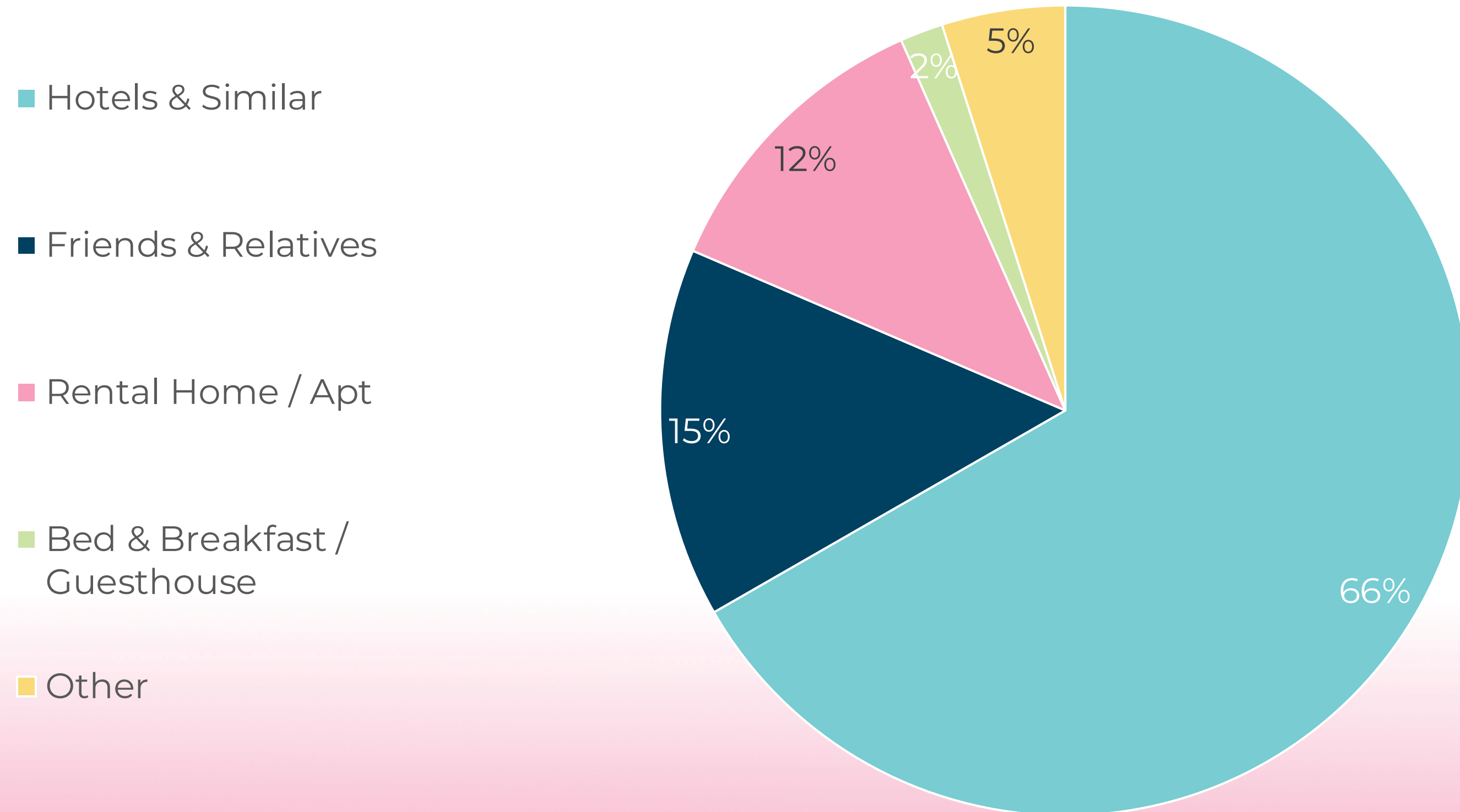


Why are our visitors coming to Bermuda?



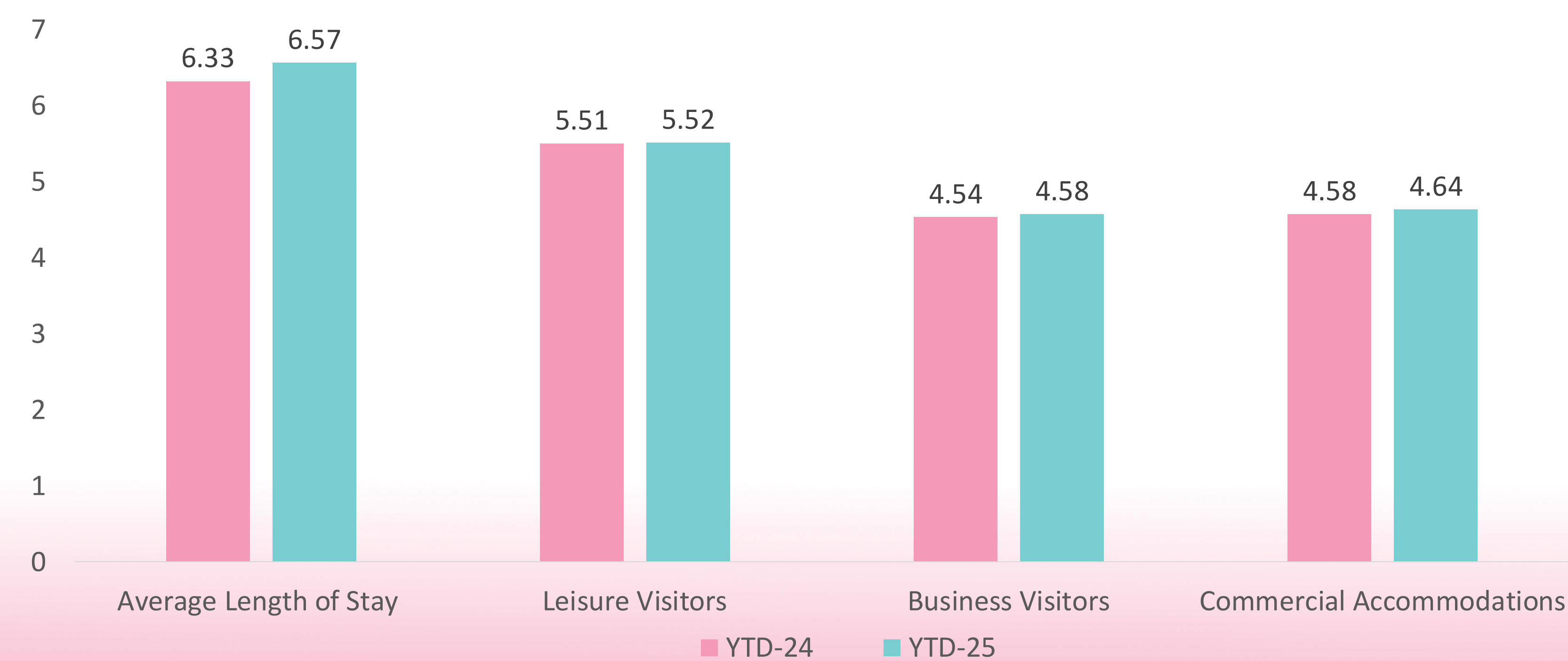
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Where do our visitors Stay?



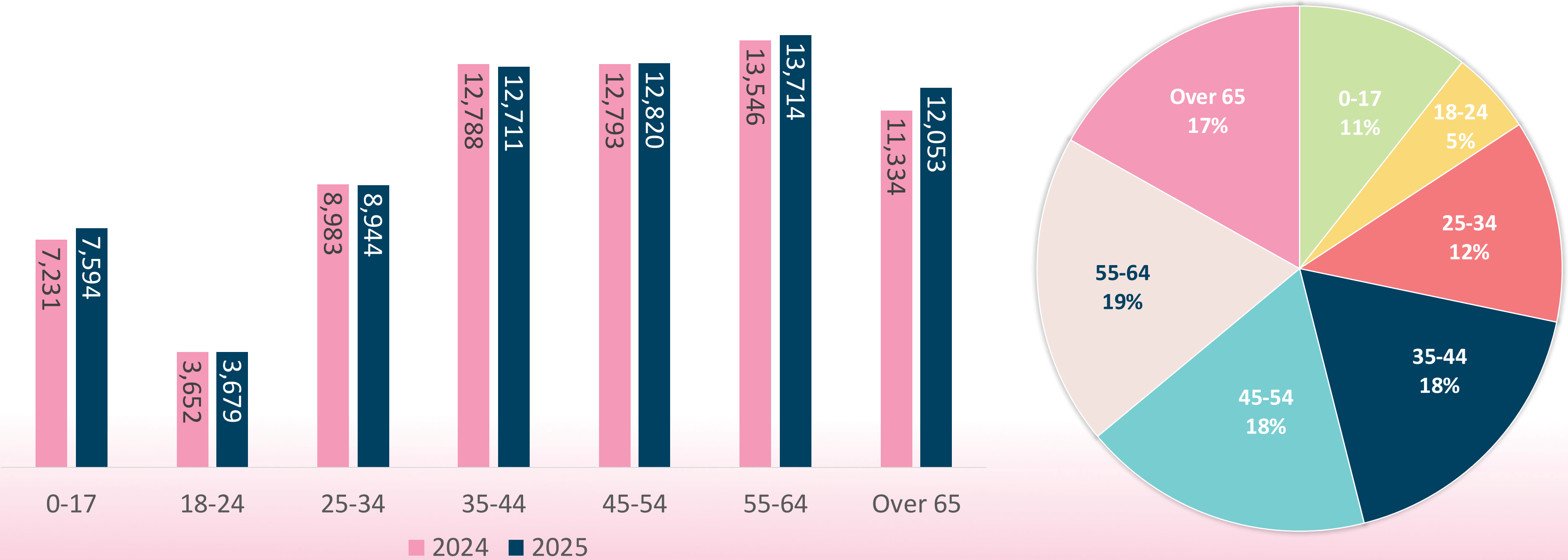
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How long do our air visitors Stay?



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What age are our leisure air visitors?



Exit Survey Objectives

The primary objectives of the Bermuda Air Visitor Exit Survey are to develop a profile of Bermuda visitors and gather key insights about the Bermuda visitor experience. The study sought out to:

- 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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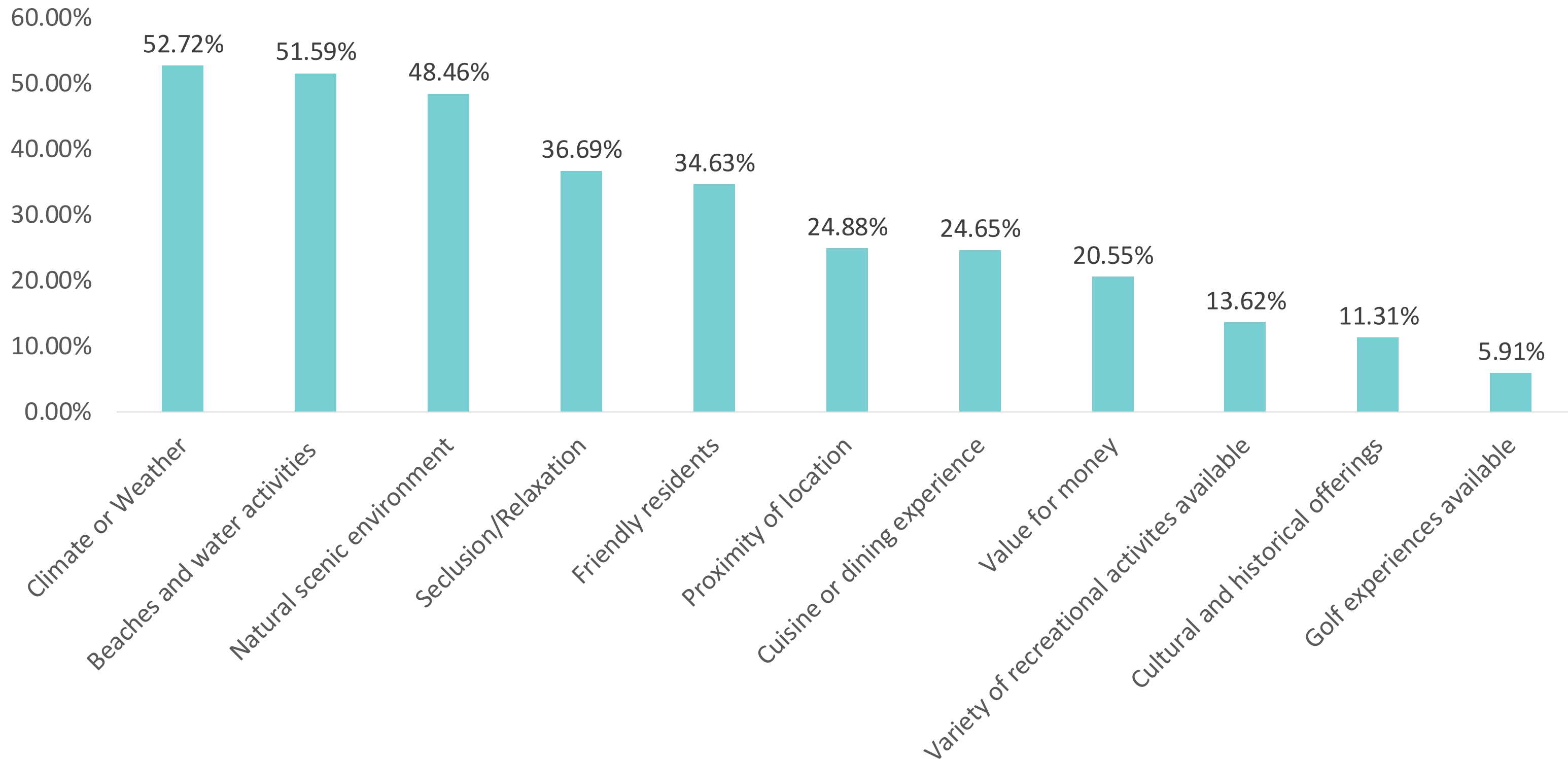
Exit Survey Data Segmentation

Category	
Country of Origin	US Canada Europe UK Rest of World
Visitation	First time visitor Repeat visitors
Purpose of Visit	Business Leisure VFR Leisure/VFR
Accommodation Type	Commercial Non-Commercial (Private Home) Vacation Home Rental

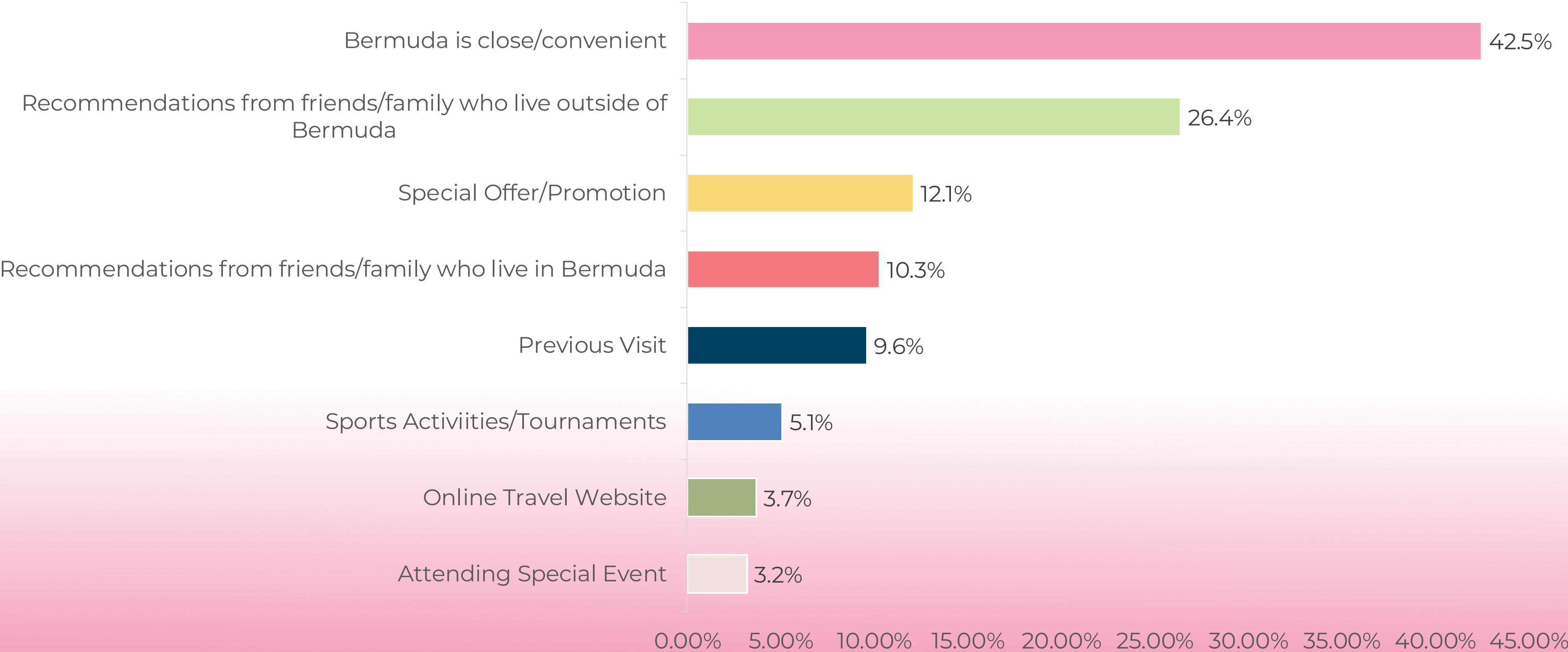
Category	
Travel Party	By Yourself Family Couple + (with friends)
Ethnicity	Caucasian Black Other
Persona's (US, UK, CA)	Adventure Seekers Experience Enthusiasts Active Families Golden Boomers Jet Setters
Income	<\$100k >\$100K

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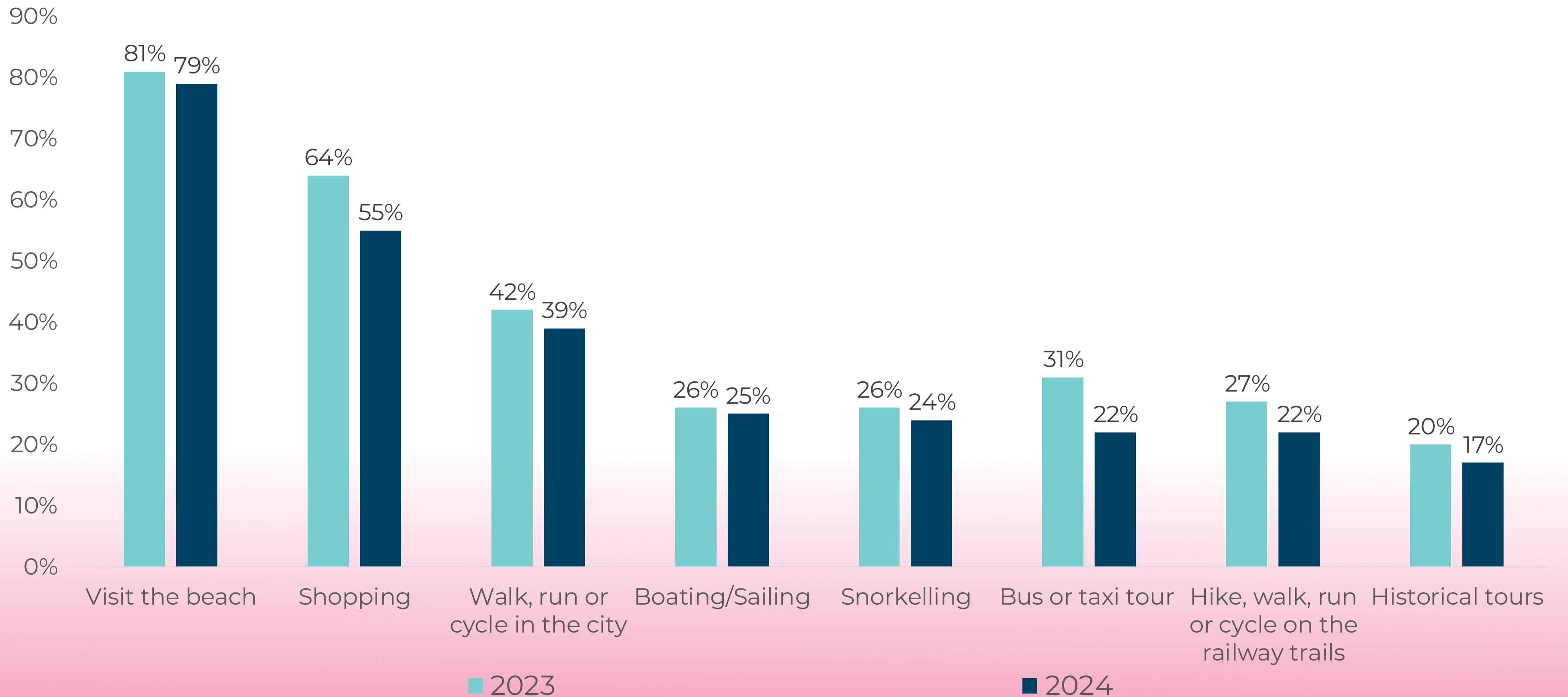
Exit Survey – Attributes Considered when Selecting Bermuda



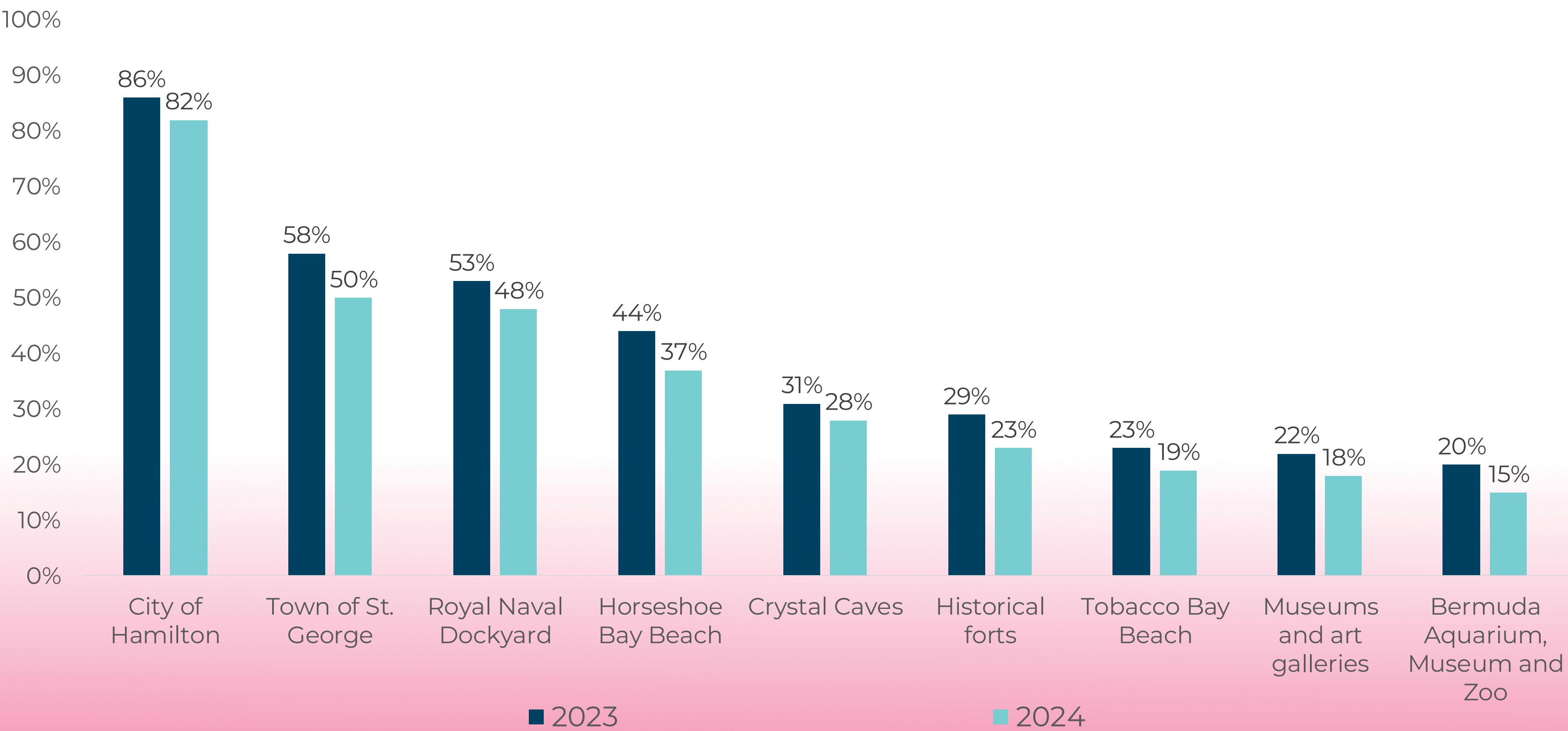
Factors Influencing Bermuda as the chosen Destination



Activities Participated in While Visiting Bermuda

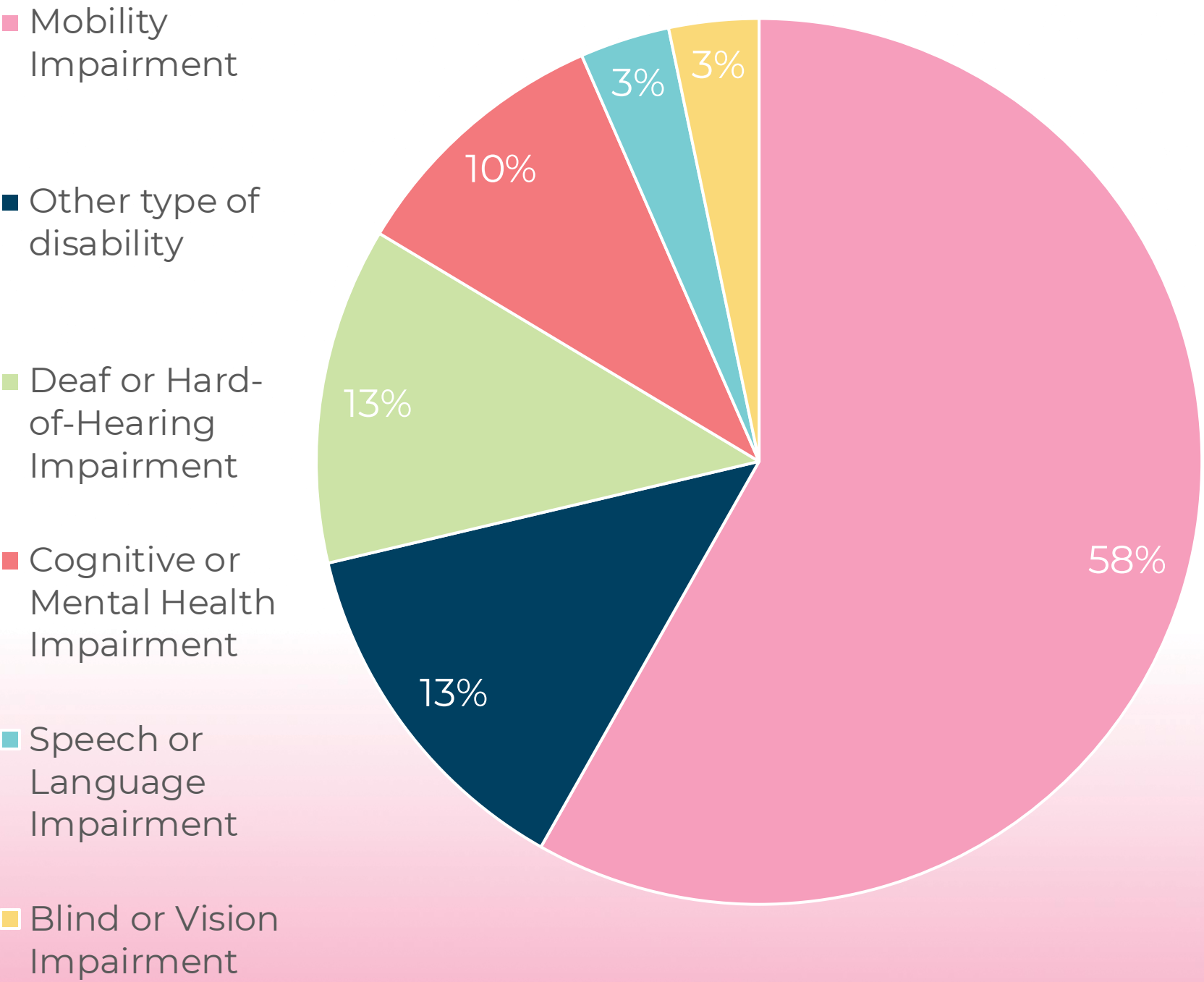


Attractions Visited in Bermuda

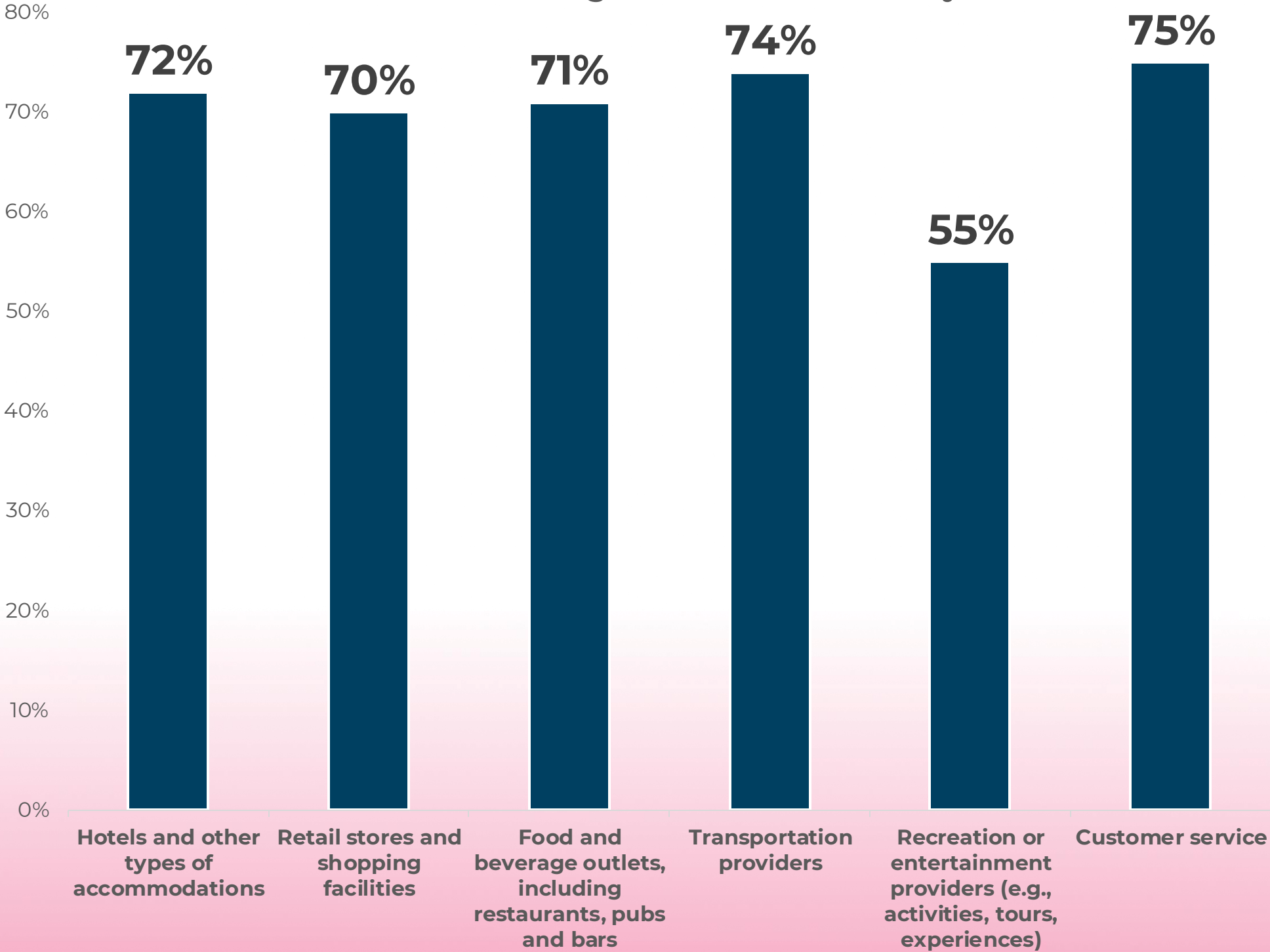


Air Visitors with Disabilities

(For those with disabilities) What type of disabilities?



Please rate the following sectors on disability access.



Average Visitor Spending per Air Visitor (Q2 YTD thru June)

Total



\$1,990

Leisure



\$2,133

Business



\$2,036



\$2,060



\$1,965

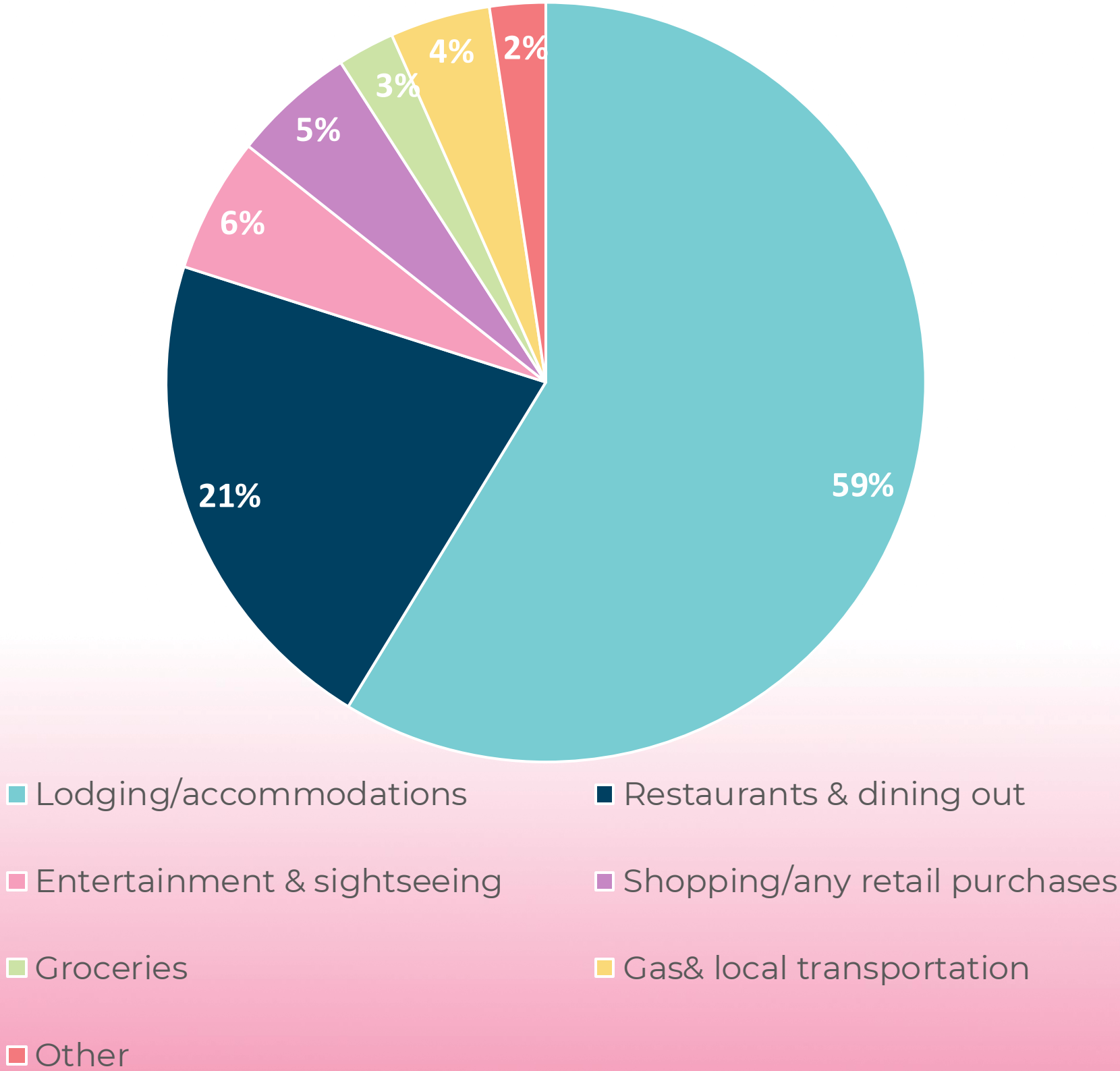


\$1,993

Q2 YTD Average Visitor Spending Per Person

	Q2 YTD 2025
Lodging/accommodations	\$1,168.19
Restaurants & dining out	\$422.01
Entertainment & sightseeing	\$114.56
Shopping/any retail purchases	\$104.36
Groceries	\$48.40
Gas& local transportation	\$84.93
Other	\$47.34
Total	\$1,989.78

Q2 YTD 2025 PP Spending



Gap Scores – Air Visitors

Thinking about your choice of Bermuda as a vacation destination, how important was.....

Critically important

Important, but not critical

Not that important

Not at all important

How satisfied were you with each of the following factors with regards to your visit to Bermuda?

Completely satisfied

Mostly satisfied

Neither satisfied nor dissatisfied

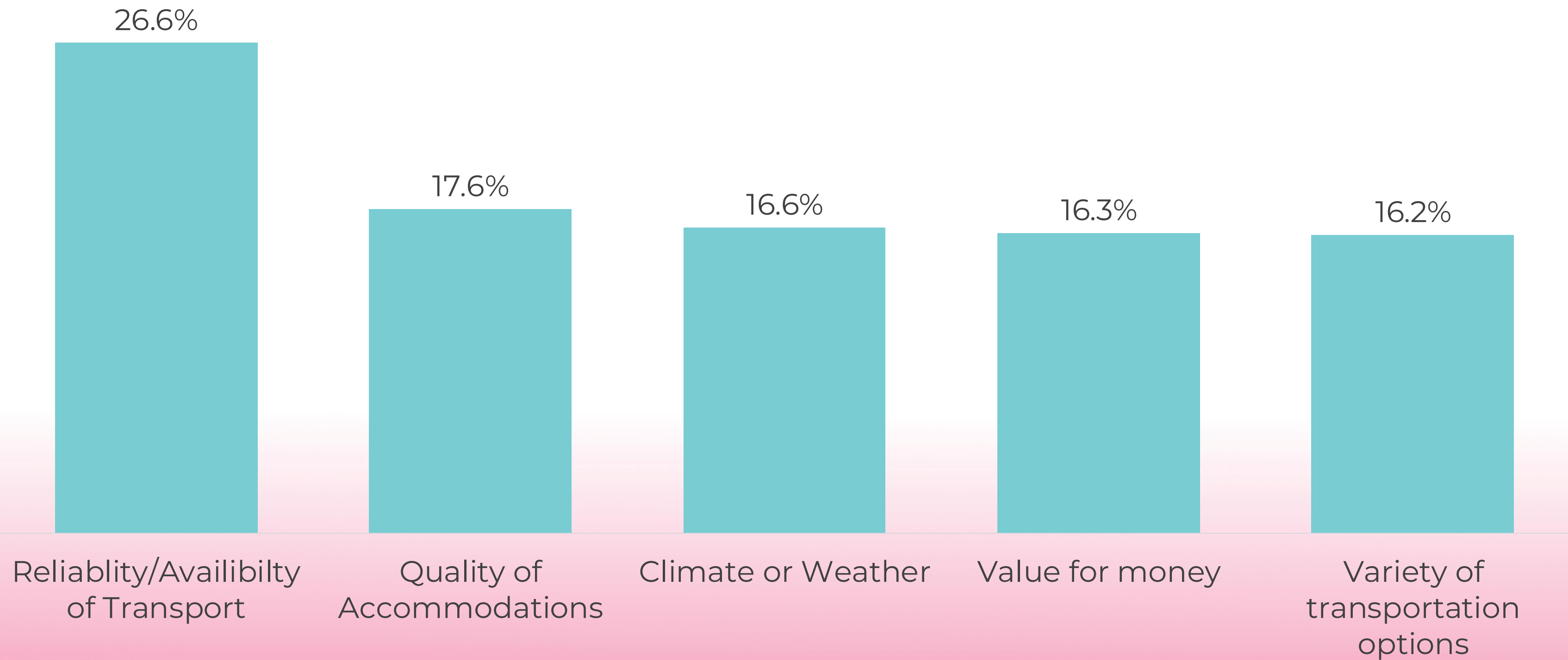
Mostly dissatisfied

Completely dissatisfied

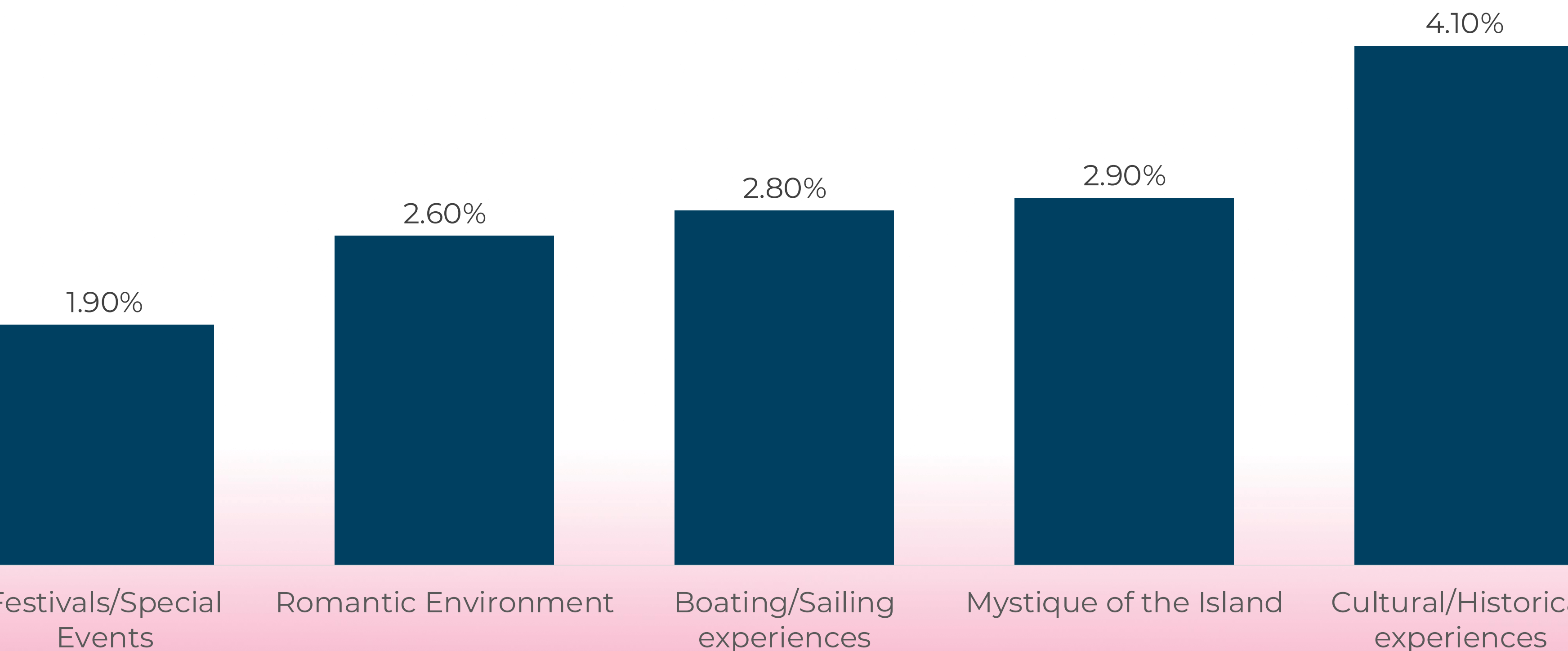
Critically Important score but only mostly satisfied experience = **Positive Gap Score**

The larger the number the worst the expectation aligned with the experience – this means we have work to do to manage visitor expectations

Gap Scores – Air Visitors



Gap Scores – Air Visitors



Visitor Verbatims

Friendliness

- *“Everyone was very welcoming and friendly, just as I remember.”*
- *“The people are the most friendly I've ever met.”*
- *“We were charmed and delighted with our visit.”*

Transportation

- *“Excellent public transportation!”*
- *“The ferry ended at 4:30pm and that was too early.”*
- *“Bus took exact change only (no credit cards).”*

Safety

- *“I feel safe walking around alone.”*
- *“Very safe getaway.”*
- *“I felt completely safe and welcomed.”*

Shopping and Dining

- *“Need more restaurants/food choices.”*
- *“Shops were closed early.”*
- *“Prices for souvenirs are too expensive.”*

Beauty and Cleanliness

- *“Bermuda is sooooo beautiful!”*
- *“Absolutely BEAUTIFUL. We had a wonderful time.”*
- *“Enjoyed your clean beautiful country, and no trash!”*

Cost and Pricing

- *“I found Bermuda to be very expensive.”*
- *“Prices very high for food.”*
- *“Shopping prices are too high.”*

Accessibility

- *“Build sidewalks!”*
- *“Handicapped access was difficult in some areas.”*
- *“We had no difficulty locating accessible bathrooms.”*

Activities and Attractions

- *“Great museum (National Museum of Bermuda).”*
- *“Tours with scenic stops were enjoyable.”*
- *“Crystal Caves tour was amazing!”*

