Executive Summary

PERCENTAGES ARE % CHANGE COMPARING 2017 AND 2018

LEISURE AIR ARRIVALS
- UNITED STATES: 12.9%
- CANADA: 10.6%
- UNITED KINGDOM: 2.9%

AIR CAPACITY
- 0.7%

TOTAL LEISURE SPENDING (AIR & CRUISE)
- 28%

CRUISE ARRIVALS IN NON-SUMMER MONTHS (SEPT-MAY)
- 34%

2018
- LEISURE AIR ARRIVALS: 11.7%
- TOTAL VISITOR ARRIVALS: 770,700
- TOTAL LEISURE SPENDING: $411 MM
- CRUISE ARRIVALS: 28%

2017
- LEISURE AIR ARRIVALS: 11.0%
- TOTAL VISITOR ARRIVALS: 769,800
- TOTAL LEISURE SPENDING: $320 MM
- CRUISE ARRIVALS: 25%
Most Visitor Arrivals Ever

2018 was the second consecutive year of record-breaking total visitor arrivals. Cruise passengers make up the largest share of total arrivals, something the National Tourism Plan sets out to improve by creating better balance between cruise and air passengers over the next five years.

For further historical data, reference pg. 10
Bermuda’s 203,697 leisure air arrivals in 2018 is the island’s best performance since 2002, when 218,248 leisure travellers arrived by air.

While 2018’s volume did not best 2002, it outperformed 2006, previously the most recent highwater mark for a successful tourism year.

For further historical data, reference pg. 10.
Declining Business and VFR Air Visitors

Air Arrivals by Purpose of Visit

- There has been a downward trend in Business and VFR air arrivals over the past 12 years, down 31% in each category.
- The increase in Leisure air arrivals has partially offset this loss.
Cruise Season Expansion

A key objective in Bermuda's cruise travel strategy is to increase the amount of cruise calls to the island in the non-summer months. This targeted effort produced a 34% increase in cruise passengers outside the summer months while holding the summer months of June, July and August flat (+0.7%).

For further information on Cruise Arrivals, reference pg. 12
### Growth in Focus and Nurture Cities

Air leisure visitors from Bermuda's six primary target cities uniformly performed well in 2018 when compared to 2017. Meantime, five out of six future growth cities (identified in the National Tourism Plan as nurture cities) also delivered year-over-year growth. These are positive signs for the island's tourism future – both near and long term.

For further insight on Air Visitor Source Markets, reference pg. 24

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<table>
<thead>
<tr>
<th>Leisure Air Visitors by City</th>
<th>2017</th>
<th>2018</th>
<th># CHG YOY</th>
<th>% CHG YOY</th>
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</thead>
<tbody>
<tr>
<td>New York</td>
<td>57,506</td>
<td>60,190</td>
<td>2,684</td>
<td>4.7%</td>
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<tr>
<td>Boston</td>
<td>23,840</td>
<td>30,541</td>
<td>6,701</td>
<td>28.1%</td>
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<tr>
<td>Philadelphia</td>
<td>9,171</td>
<td>9,948</td>
<td>777</td>
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<tr>
<td>Washington, DC</td>
<td>6,444</td>
<td>7,589</td>
<td>1,145</td>
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<tr>
<td>Toronto</td>
<td>4,126</td>
<td>4,362</td>
<td>236</td>
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<tr>
<td>Hartford</td>
<td>3,380</td>
<td>3,926</td>
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<tr>
<td>Atlanta</td>
<td>2,309</td>
<td>3,152</td>
<td>843</td>
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<tr>
<td>Baltimore</td>
<td>2,257</td>
<td>2,612</td>
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<tr>
<td>Chicago</td>
<td>2,282</td>
<td>2,303</td>
<td>21</td>
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<tr>
<td>San Francisco</td>
<td>1,684</td>
<td>1,652</td>
<td>-32</td>
<td>-1.9%</td>
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<tr>
<td>Dallas</td>
<td>1,065</td>
<td>1,195</td>
<td>130</td>
<td>12.2%</td>
</tr>
</tbody>
</table>

* Focus cities shaded in grey
Leisure Air Visitors
FOCUS & NURTURE CITIES

San Francisco 1,652

Dallas 1195

Chicago 2,303

Toronto 4,362

Baltimore 2,612

Boston 30,541

Hartford 3,926

New York 60,190

Philadelphia 9948

Washington, DC 7,589

Atlanta 3,152