

Beach Economy Vision

IMPROVING BERMUDA'S BEACH EXPERIENCE

BERMUDAΔ

Building The Vision



Formed internal working group



Canvassed beach concessionaires



Conducted travel consumer research



Consulted with partners



Formed beach target list



Assisted with local beach-goer research



Engage public (happening now)



BERMUDA

Government Consultation



Cabinet EDC



Sustainable Development



Department of Land & Buildings



Environmental Protection &
Conservation Services



Ministry of Economic Development



Department of Communication &
Information



Department of Parks



Ministry of Public Works



Department of Planning



Parks Commission

NGO CONSULTATION



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Beaches Target List



Horseshoe Bay

Shelly Bay

Clearwater Beach

Tobacco Bay

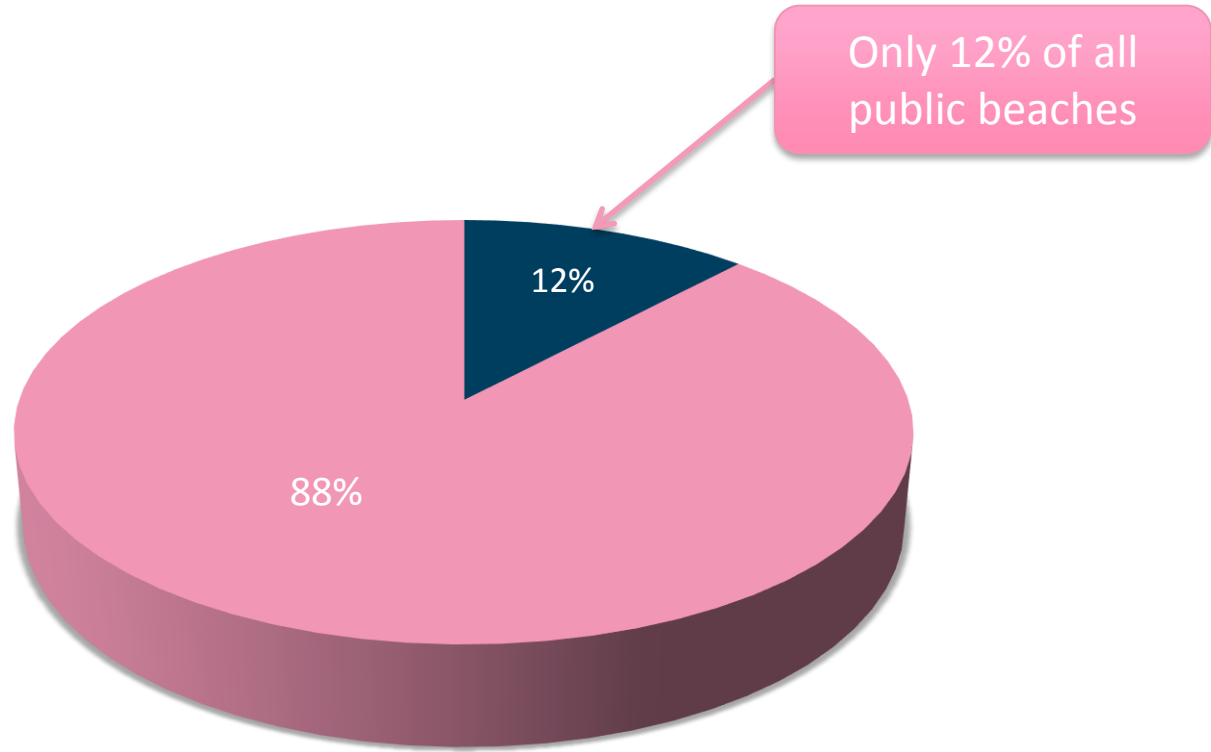
John Smith's Bay

RESTRAINED & RESPONSIBLE

- Focus on improved amenities instead of new development
- Improve existing facilities at beaches already approved for commercial activity
- Only 5 of 40 public beaches on target list



Minimal Commercialisation



Beach Economy Research Plan

Phase 1: Completed ✓

- Quantitative online survey of potential visitors and previous visitors.
- Divided into groups by demographics, psychographics and geographic areas.
- 2,901 respondents completed the survey.
- Previous visitors were from BTA's online panel/database.



PHASE 1 KEY FINDINGS

- Beach experiences are seen as important by the vast majority across all personas.
- The “ideal” beach is clean, with abundant natural beauty and powdery sand.
- When asked to select the most important beach attribute: cleanliness, water quality, toilets and no overcrowding.
- Visitors desire primarily casual dining options near the beach.
- They expect moderate prices for food, beverages and services.





Phase 2 Completed ✓

- Qualitative focus groups were held in NYC and Boston to gain deeper insights into visitor desires.
- Four two-hour focus groups were held with a mix of potential and past visitors to Bermuda.

Phase 2: Key Findings

- General preference for public beaches that are easy to access, with a relaxing energy and many available activities (while still retaining a quiet, peaceful ambiance).
- Interest in basic amenities such as chair rental, towel service and equipment rental. Clean bathrooms were an absolute necessity.
- Would appreciate an array of high-quality but casual food options close to the beach and when possible, have options of local cuisine.



Phase 3: Completed ✓

- Local poll with 400 residents weighted to represent Bermuda's population.
- 79% of residents felt Bermuda's public beach are better than those found in other destinations. Reasons included natural beauty, unique pink sand, spacious/not crowded.
- Of those who felt it was worse, suggestions for improvement included activities, entertainment, rental equipment, food options and restroom facility improvements.



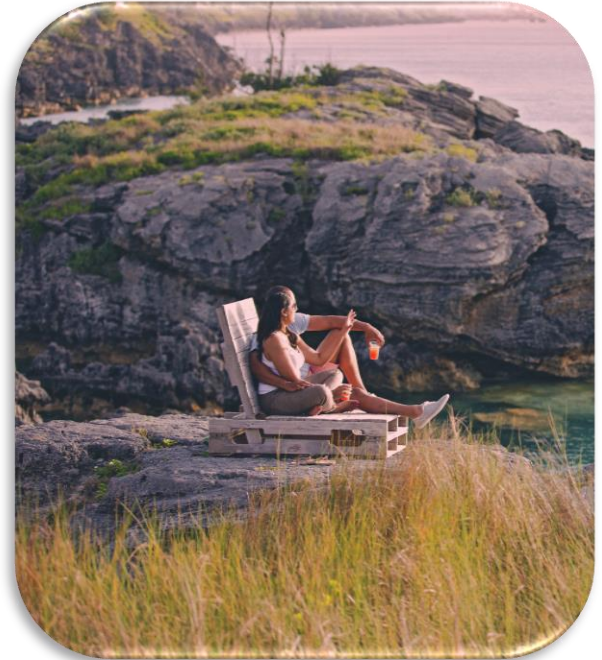


Phase 4 Completed ✓

- Poll of civil servants (543 completed survey).
- Asking same questions that visitors were asked in Phase 1:
 - Ideal experience
 - Most important beach attributes
 - Dining options
 - Prices expect to pay
- Will identify gaps, if any, between visitors' and residents' desired experience.
- Will help solidify and finalize the vision for Bermuda's beaches.

Phase 4: Key Findings

- Findings indicate there is close alignment on desired beach experience for residents and visitors.
- The “ideal” beach is clean, peaceful/calm, and beautiful.
- When asked to select the most important beach attributes: cleanliness, water quality, toilets were top 3 (same as visitors). Rounding out the top 5 were lifeguards on duty and public parking.
- Visitors desire primarily casual dining options near the beach (sit-down and service to beach chairs) while residents were more likely to want food trucks/carts and take-away food.
- Residents were willing to pay slightly less for amenities on the beach vs. visitors (such as food, beverages, chair and towel rental).



BEACH VISION INGREDIENTS



Traveller Feedback



Local Beachgoer Feedback

BERMUDA

Brand Alignment



Stakeholder Consultation



BERMUDA

Traveller Feedback



Clean



Beauty



Casual



Relaxed



Service



Consumer Desires



Brand Alignment

Authentic

Cultural

Iconic



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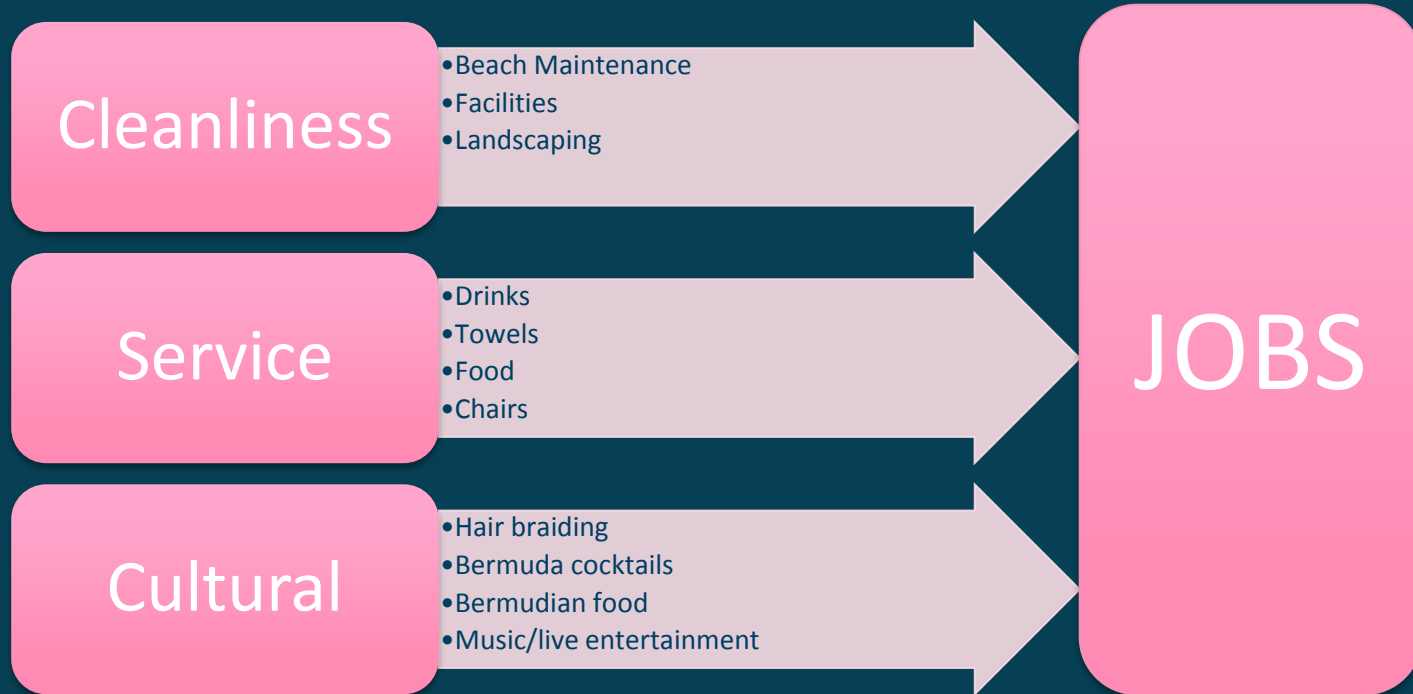
Vision Statement

The Bermuda pink sand beach experience must be iconic, memorable for its natural beauty complemented by cleanliness and casual amenities that are culturally authentic – true to the island's attitude of unpretentious relaxation and warm hospitality.

Consumer Expectations Alignment

*Local beach users and visiting beach users
have aligned expectations for their
Bermuda beach experience.*

Job Creation



Oversight Needs

Coordination

Transport Plan

Jobs Plan

Nightlife Plan

Educate Public





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BEST Response

“...BEST was comfortable with the BTA’s overall vision to improve existing services and amenities on five public beaches, recognising that some of Bermuda’s beaches should remain pristine, and none should be developed near their carrying capacity. BEST was also supportive of the BTA’s commitment to not build on beaches not yet developed.”

- Bermuda Environmental Sustainability Taskforce

HORSESHOE BAY BEACH

- Horseshoe Bay Beach is recognised by TripAdvisor, the world's largest travel site as one of the best beaches in the world.
- Ranked 6th in the Caribbean and 24th in the world.
- Awarded the Trip Advisor Travellers choice award for 2016.

"Perfect beach!"



Reviewed April 2, 2016



via mobile



One of the most beautiful beaches anywhere! The water is a spectacular sight with incredible shades of blue & turquoise. The large, flat pink sand beach is perfect for sunbathing. There are also many coves and trails leading to other beaches along the coastline. Stunning!



BERMUDA

NATIONAL GOALS



**Make
Horseshoe
Bay Beach #1
Beach In The
World**

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