

H2R Market Research

Reveal Your Customer's Full Experience

**Visit Tampa Bay
2018 In-State Campaign
Marketing & Media Effectiveness Research**

Delivered September 2018

4650 S. National Ave, Suite C1
Springfield, MO 65810

417.877.7808

@H2RMktResearch

Project Overview

PURPOSE

The purpose of this study is to measure the incremental impact Tampa Bay's In-State Marketing Campaign had on visitation and spending as well as to calculate a marketing ROI. The results of this study were compared to previous In-State Campaigns (whole campaigns and direct market comparisons), historical averages and H2R's Proprietary Industry Norms for context.

TARGET AUDIENCE

The Tampa Bay In-State Marketing & Media Effectiveness study was conducted among travelers living in select feeder markets: Orlando, Miami, Fort Myers and Jacksonville. The research was conducted in September 2018 to capture the travel and spending that was generated as a direct result of the In-State Campaign and to provide an accurate measurement of the marketing ROI.

SAMPLE

A total of 1,200 respondents were interviewed for this study. This sample size provides for a maximum margin of error of +/-2.8% at a 95% confidence interval overall, and +/-5.6% per individual market.

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Executive Summary

Market Reach Increases

- Visit Tampa Bay continues to run an effective In-State campaign that drives incremental visitation to the area at an efficient cost that delivers return on investment. The combination of TV, Out of Home (OOH), Digital and Radio advertising were the right mix to drive visitation to Tampa from the in-state target markets. The 2018 In-State campaign reached 46% of the households in the target markets which equated to 1.6M households.
- Overall OOH advertising generated the highest awareness this year (36%)—an 8 point increase over 2017. This included a combination of Gas Station TV, Digital Outdoor Bulletins, Transit and Airport advertising. TV advertising awareness followed closely (35%), while digital (28%) and radio (20%) awareness were also strong individually.
- The 2018 campaign efficiently reached the households in the target markets with a cost of just \$0.21 per aware household. More efficient than 2017 and on par with the historical average for In-State campaigns.



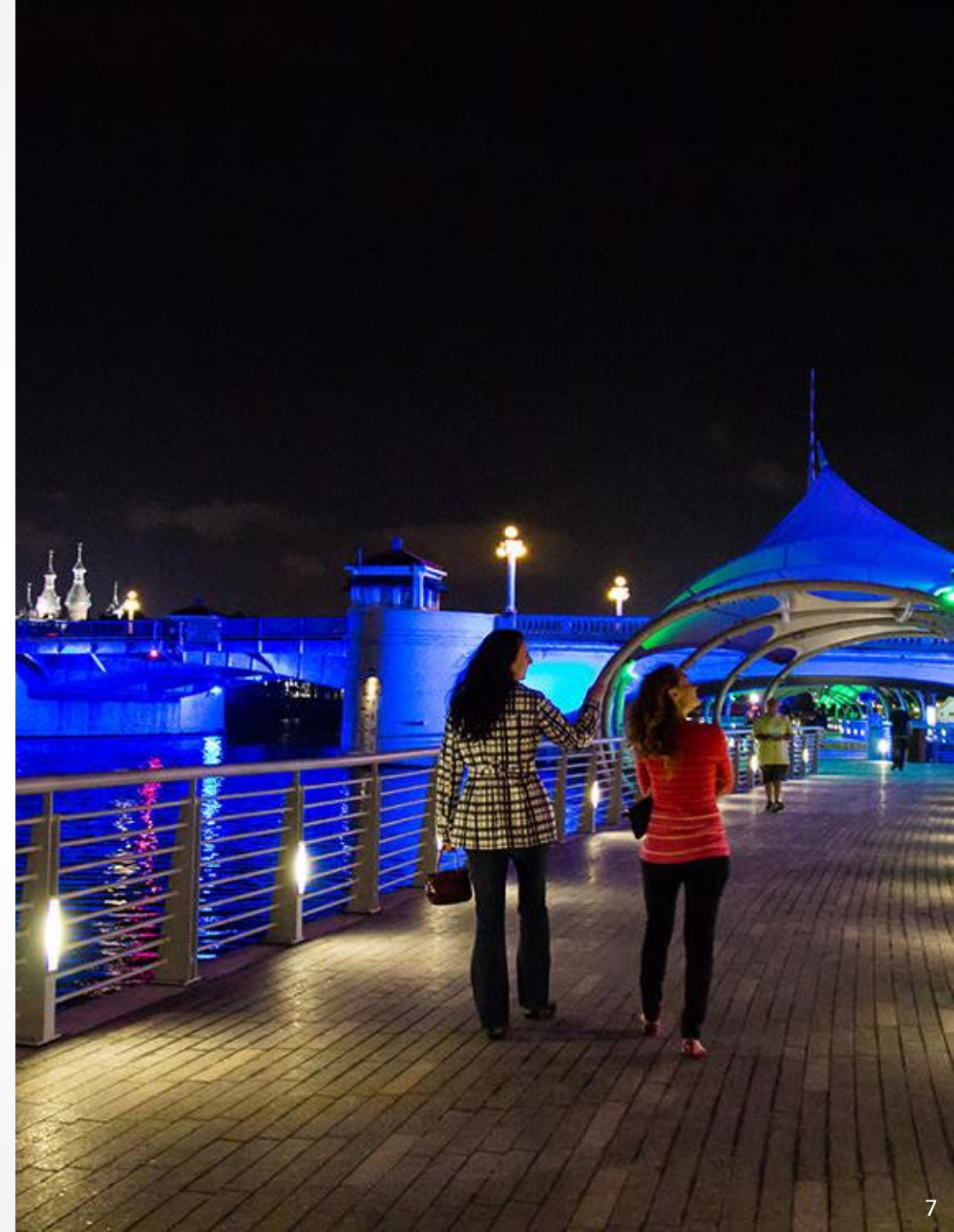
Incremental Metrics Break Records

- While reaching households with advertising is important, driving visitation to Tampa that would not have occurred otherwise is even more important. The 2018 In-State Campaign delivered a 2.9% increment translating to 47k incremental trips to the Tampa Bay area. Both the increment and the resulting household trips were record-breaking for Tampa In-State campaigns.
- Extrapolated across summer travelers' trip spending (\$682), the campaign generated nearly \$32M in incremental travel revenue, topping the 2017 record for the In-State Campaign of \$27 million. Furthermore, the campaign generated a Gross ROI of \$95 (+32%) and a Net ROI of \$98 (+35%).
- The campaign also helped benefit the local economy by generating more than 70k incremental room nights for Hillsborough County alone. More than 142k room nights were impacted in the entire greater Tampa Bay area.



Ads Resonate and Inspire Action

- The 2018 campaign continues to resonate with in-state travelers. The relevance and brand fit scores were identical to 2017, and differentiation from other travel ads increased by 6 points. Nearly half of travelers could identify that the ads are for Tampa, even if there were no logo/branding.
- The ads continue to make Tampa Bay seem like an easy place to visit for a quick getaway (82%) and show in-state travelers new things to do and explore (70%). The ads also continue to inspire action, as more travelers this year are likely to visit the official Tampa website, book trips, request information and visit Tampa social media pages.
- Perhaps most important, the ads are generating lift in intent to visit Tampa Bay in the future. Overall lift reached 8 points, with the largest lift seen from Miami travelers (+12 points).



Tampa Bay In-State Campaign

Key Performance Indicators (KPI) Summary

Tampa Bay's 2018 In-State Marketing Campaign generated nearly \$32M in incremental spending for the Tampa Bay area—a new record for In-State marketing.

Market reach is on the rise again after being disrupted by Hurricane Maria in 2017. The ads continue to effect travel as incremental travel and incremental household visits both increased to record-breaking levels this year. The increase in increment, coupled with a smaller in-state marketing budget drove Net ROI up to \$98—a 35% increase over last year.

Key Performance Indicators	2017 Campaign	2018 Campaign	Tampa In-State Historical Average
Aware Households	1.5M	1.6M	1.1M
Incremental Visitation	+2.5%	+2.9%	+2.1%
Incremental Trips	+38.3k	+46.5k	+24.2k
Incremental Revenue	+\$27.0M	+\$31.7M	+\$15.3M
Gross Media Investment	\$374k	\$334k	\$210k
Gross Cost/Aware Household	\$0.25	\$0.21	\$0.20
Gross Return on Investment	\$72	\$95	\$75
Net Media Investment	\$374k	\$325k	\$192k
Net Cost/Aware Household	\$0.25	\$0.21	\$0.18
Net Return on Investment	\$72	\$98	\$94

Marketing Efficiency

01

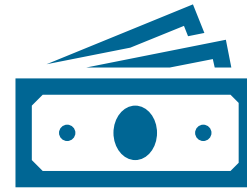
MARKETING EFFICIENCY KPIs*



46% of travelers saw or heard a Tampa Bay In-State advertisement



Tampa Bay's In-State Campaign reached **1.6M** households



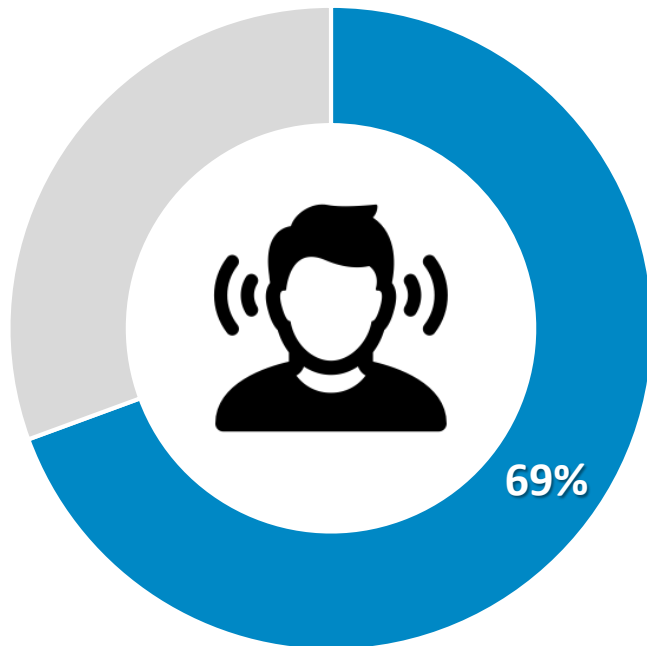
The cost per aware household averaged **\$0.21**



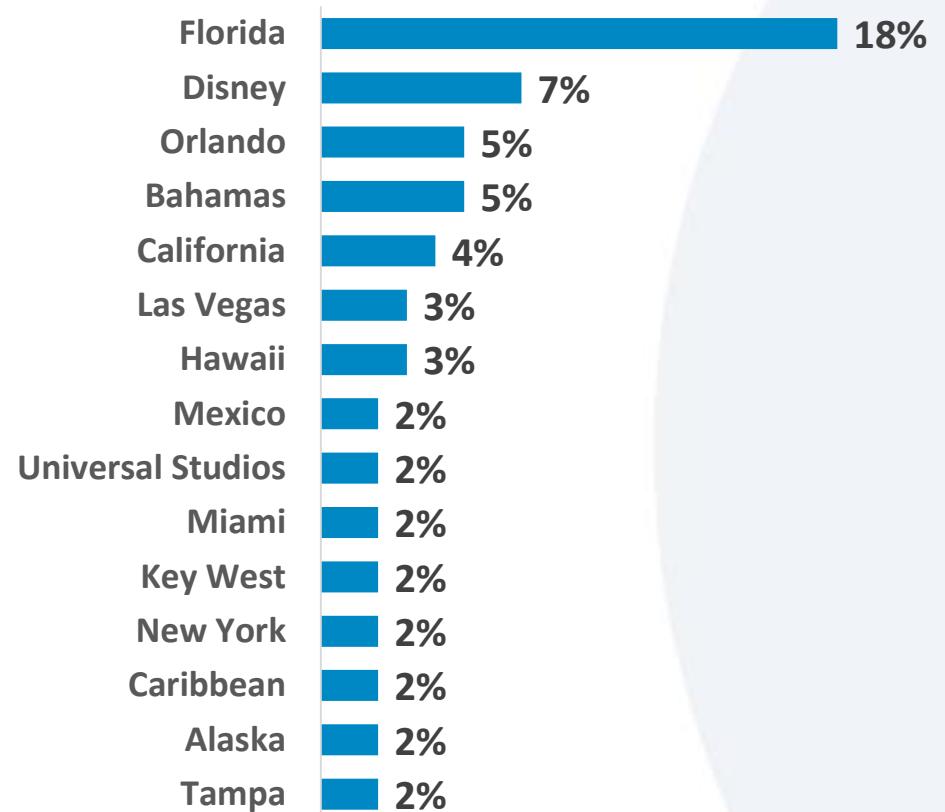
Tampa Bay invested nearly **\$334k** in Gross Advertising for the In-State Campaign

Nearly 7 in 10 travelers recall seeing/hearing any type of travel ads in the past 6 months. Tampa ads were mentioned (unaided) by 2% of travelers.

Seen/Heard Any Travel Ads in Past 6 Months



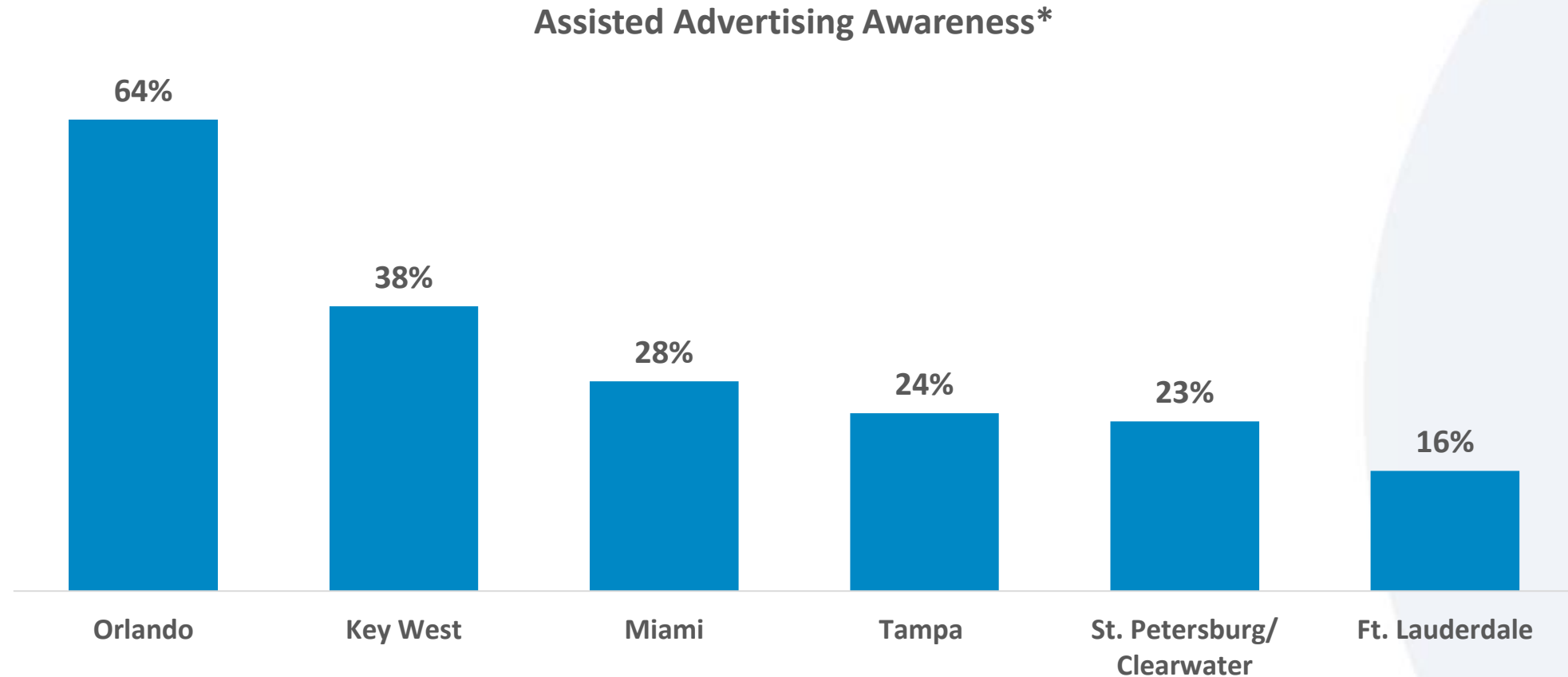
Top of Mind Travel Ads Recalled



Q11: Have you seen or heard any destination travel advertisements anywhere in the past 6 months?

Q12: Which destinations do you recall hearing/seeing travel advertisements for?

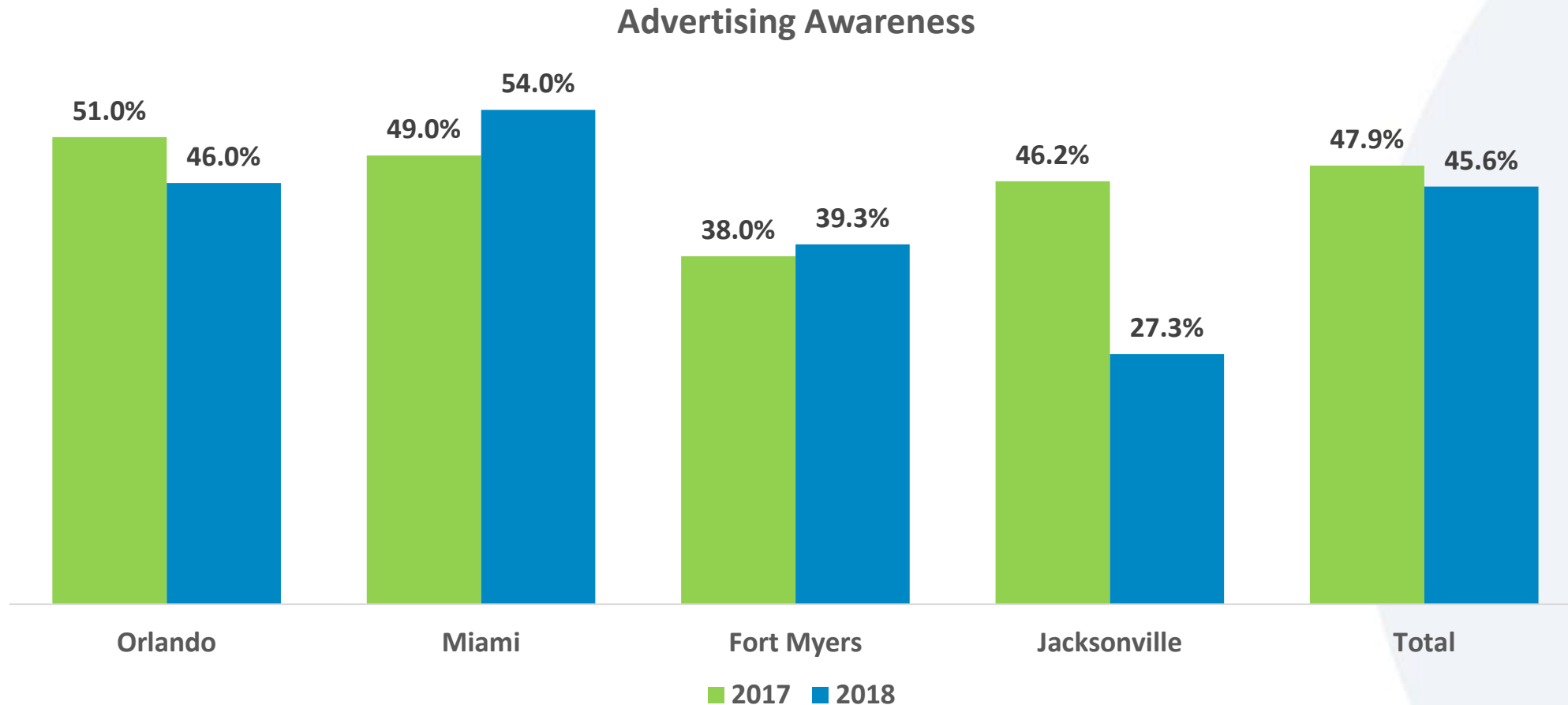
Assisted advertising awareness for Tampa reached nearly a quarter of travelers in the in-state markets—somewhat below the average that is inflated by Orlando, but on par with the average excluding Orlando (26%).



Q13: Have you seen or heard travel advertisements in the past 6 months for any of the following destinations?

*Assisted advertising awareness lists the name of the destinations, but not specific creative pictures, videos, etc.

Overall awareness remained on par with 2017. There were slight shifts in awareness by market, but a significant decline in Jacksonville in which advertising was cut to digital only this year.



Market Reach (Aware Traveler Households)

Tampa Bay's In-State Marketing Campaign generated a market reach of 1.6 million traveler households, 500k higher than the historical average.

Traveler households have begun to increase again this year, providing a larger pool of travelers for Visit Tampa Bay to reach. The In-State campaign saw substantial increases in reach for Miami and Fort Myers, providing for a slight increase in reach overall.

Market Reach	2017 Market Reach	2018 Market Reach	Tampa Historical Average
Orlando	566k	542k	457k
Miami	590k	736k	527k
Fort Myers	152k	161k	139k
Jacksonville	213k	139k	205k
Total Market Reach	1.5M	1.6M	1.1M

Media Expenditures

Total gross marketing expenditures decreased by 11% this year, but are still well above the historical average for In-State Campaigns.

Jacksonville saw the largest decline (-51%) in gross investment this year, as everything but digital was cut from this market. And, unlike last year, some of the budget was pulled out for more non-consumer facing expenditures this year.

Gross Media Expenditures	2017 Investment	2018 Investment	Tampa Historical Average
Orlando	\$146,136	\$142,927	\$87,779
Miami	\$137,732	\$120,503	\$83,499
Fort Myers	\$37,954	\$44,802	\$34,883
Jacksonville	\$51,837	\$25,366	\$46,150
Total Gross Spending	\$373,659	\$333,599	\$210,475

Net Media Expenditures*	2017 Investment	2018 Investment	Tampa Historical Average
Orlando	\$146,136	\$138,506	\$80,242
Miami	\$137,732	\$118,431	\$77,485
Fort Myers	\$37,954	\$43,484	\$31,151
Jacksonville	\$51,837	\$24,149	\$43,457
Total Net Spending	\$373,659	\$324,570	\$191,561

*Only consumer-facing expenditures are included in the Net Investment figures.

Media Efficiency

The 2018 campaign was slightly more efficient than last year as well, staying on par with the historical average.

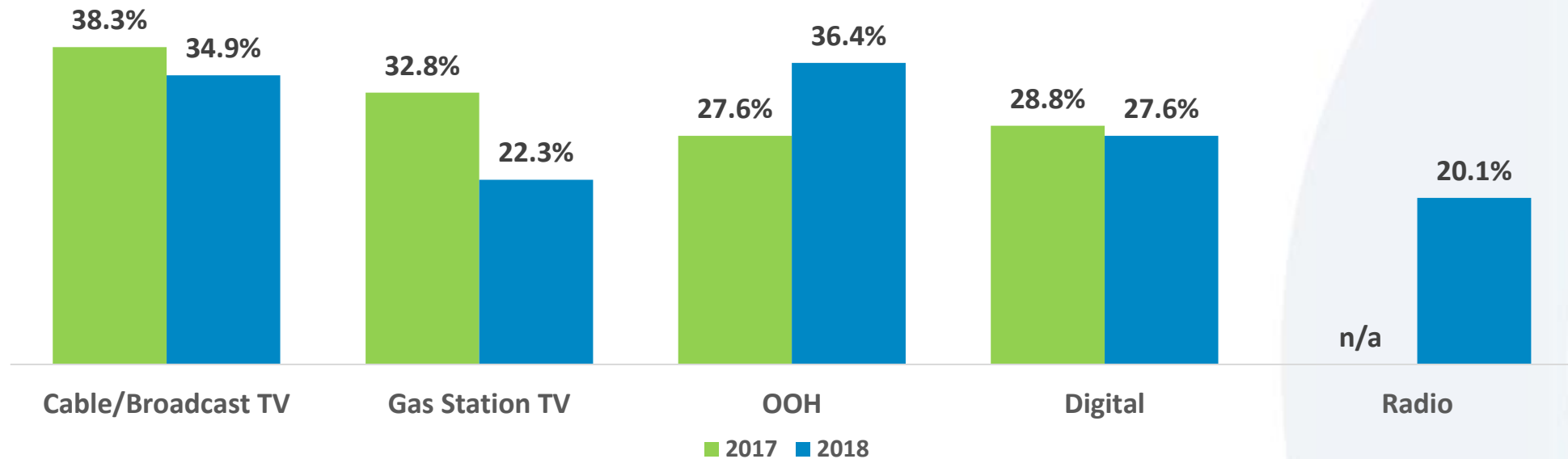
Each market cost \$0.16-\$0.28 per household with Tampa's advertising efforts. This provides for a total cost that is on par with the H2R Norm of \$0.22 per aware household among destinations with similar advertising budgets.

Gross Marketing Efficiency	2017 Efficiency	2018 Efficiency	Tampa Historical Average
Orlando	\$0.26	\$0.26	\$0.19
Miami	\$0.23	\$0.16	\$0.15
Fort Myers	\$0.25	\$0.28	\$0.26
Jacksonville	\$0.24	\$0.18	\$0.22
Total Spending	\$0.25	\$0.21	\$0.20

Net Marketing Efficiency	2017 Efficiency	2018 Efficiency	Tampa Historical Average
Orlando	\$0.26	\$0.26	\$0.18
Miami	\$0.23	\$0.16	\$0.14
Fort Myers	\$0.25	\$0.27	\$0.23
Jacksonville	\$0.24	\$0.17	\$0.21
Total Efficiency	\$0.25	\$0.21	\$0.18

Out-of-Home (OOH) advertising generated the highest levels of awareness for the In-State Campaign, followed closely by television.

Advertising Awareness by Medium



	2017	2018	2017	2018	2017	2018
Orlando	29.3%	20.8%	35.0%	21.8%	20.1%	
Miami	41.3%	26.5%	45.3%	33.4%	n/a	
Ft. Myers	31.3%	13.7%	13.3%	26.3%	n/a	
Jacksonville	n/a	n/a	n/a	27.5%	n/a	

Incremental Impact

02

MARKETING RETURN KPIs



Tampa Bay's In-State Marketing Campaign resulted in **46.5k** incremental trips



A record setting **\$31.7 million** was generated in incremental travel spending



Incremental room nights totaled **70k**



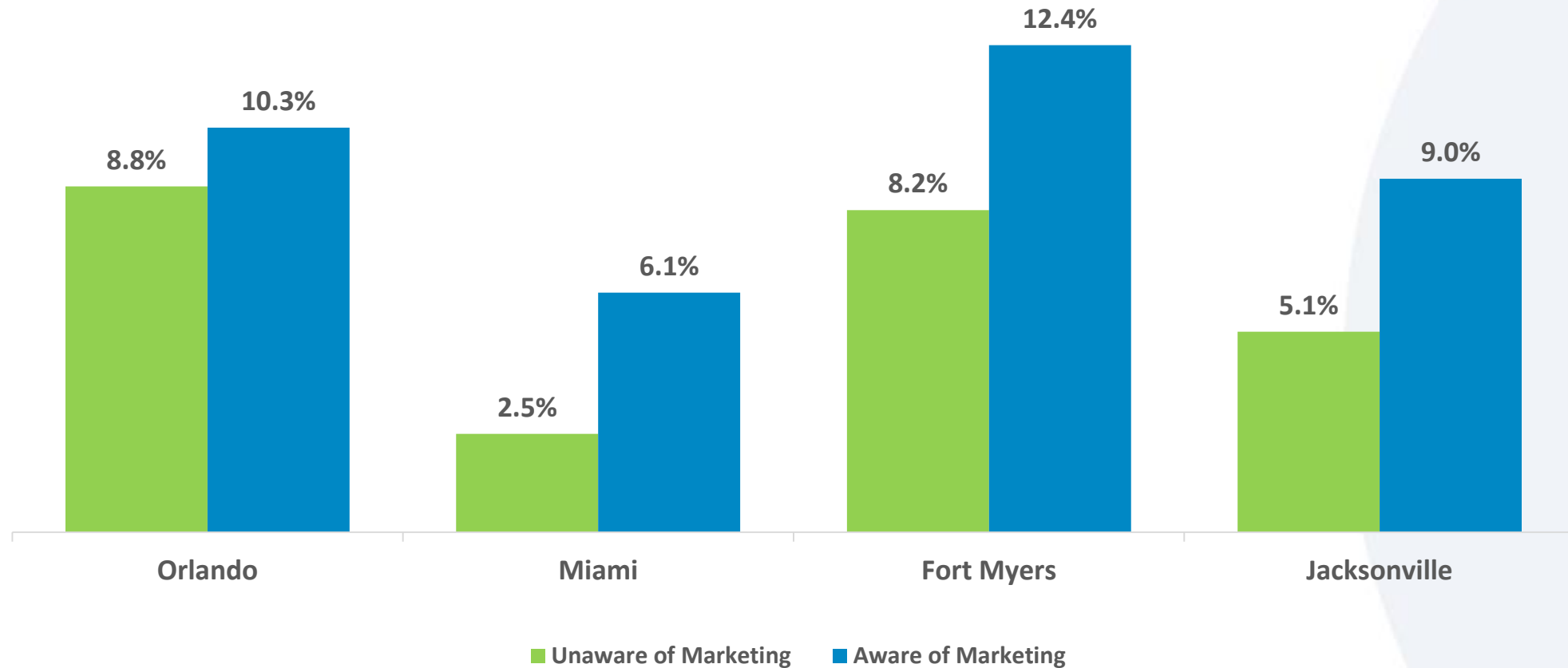
Tampa Bay invested nearly **\$334k** in marketing expenditures



ROI was \$95

The In-State Campaign generated incremental visitation from every advertised market in 2018, providing an overall increment of +2.9%.

Visitation – Aware vs. Unaware Households



Incremental Travel

Incremental Travel increased once again in 2018 to a total of 2.9%. This marks a record high in incremental travel, topping the 2015 In-State increment of 2.8%.

The increase in incremental travel extrapolates to more than 46,000 impacted trips that would not have occurred without Visit Tampa Bay's advertising efforts. This also marks a record for Visit Tampa Bay's In-State advertising campaigns.

% Increment	2017 Increment	2018 Increment	Tampa Historical Average
Orlando	2.1%	1.5%	2.2%
Miami	3.1%	3.6%	2.0%
Fort Myers	3.3%	4.2%	3.0%
Jacksonville	1.5%	3.9%	2.7%
Total Increment	2.5%	2.9%	2.1%

Incremental Visitation	2017 Increment	2018 Increment	Tampa Historical Average
Orlando	12.1k	7.9k	10.4k
Miami	18.0k	26.4k	10.3k
Fort Myers	5.0k	6.8k	4.3k
Jacksonville	3.2k	5.4k	5.3k
Inc. Visitation	38.3k	46.5k	24.2k

Tampa Bay's In-State Marketing Campaign generated an Gross ROI of \$95 for every dollar invested.



Party Trip Spending

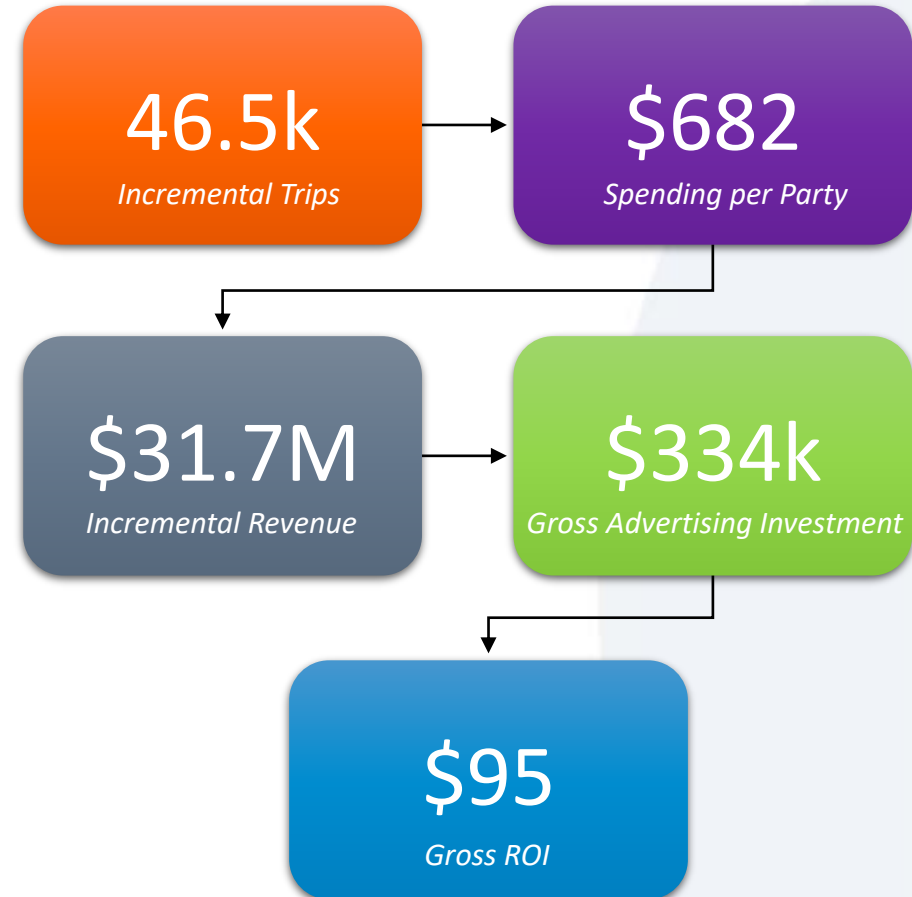
\$682

In-State 2017: \$705

In-State 2016: \$628

In-State 2015: \$608

In-State 2014: \$658



\$325k Net Investment | \$98 Net Return on Investment

Incremental Spending

Incremental spending increased to nearly \$32M in 2018—yet again breaking the record for incremental spending generated by an In-State campaign.

Tampa Bay’s visitors spent \$682 per party this past summer, on par with past visitor spending. As a result of the In-State Campaign, incremental spending in Tampa reached its highest levels—thanks mostly to those visiting from the Miami market.

Incremental Spending	2017 Incremental Spending	2018 Incremental Spending	Tampa Historical Average
Orlando	\$6.4M	\$4.6M	\$5.5M
Miami	\$15.3M	\$19.9M	\$7.9M
Fort Myers	\$2.9M	\$3.5M	\$2.2M
Jacksonville	\$2.5M	\$3.8M	\$3.9M
Total Inc Spending	\$27.0M	\$31.7M	\$15.3M

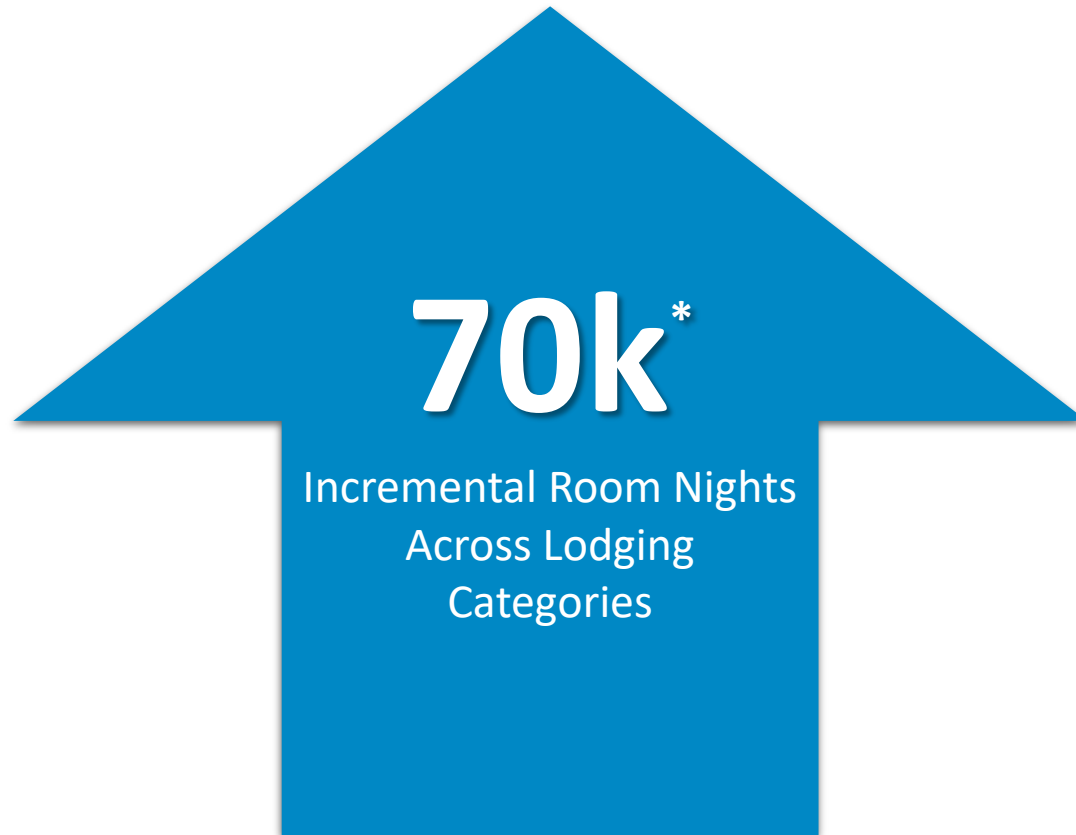
Return on Investment

Gross Return on investment for the 2018 In-State Campaign was \$95, significantly higher than 2017 levels and the historical average for In-State campaigns.

Miami was the strongest market, returning \$165 for every dollar spent, and \$168 for every consumer-facing dollar spent. And, although spending was cut significantly for Jacksonville, the ROI was still significantly higher this year. This shows that targeting the right people with the right message will win out over high spending every time.

Gross Return on Investment	2017 Return on Investment	2018 Return on Investment	Tampa Historical Average
Orlando	\$44	\$32	\$91
Miami	\$111	\$165	\$102
Fort Myers	\$75	\$78	\$76
Jacksonville	\$48	\$149	\$95
Gross ROI	\$72	\$95	\$75
Net Return on Investment	2017 Return on Investment	2018 Return on Investment	Tampa Historical Average
Orlando	\$44	\$33	\$110
Miami	\$111	\$168	\$114
Fort Myers	\$75	\$80	\$89
Jacksonville	\$48	\$156	\$101
Net ROI	\$72	\$98	\$94

Incremental Room Nights



The In-State Marketing Campaign generated more than 70k incremental *room nights* (that would not have occurred otherwise) from those staying overnight in Hillsborough County at a Hotel/Motel, Bed & Breakfast, Condo, Cabin, Cottage or Resort.

Extrapolated across the number of rooms purchased and length of stay it is estimated that the In-State Marketing Campaign generated approximately 17% of the total room nights utilized by travelers in Hillsborough County during this timeframe.

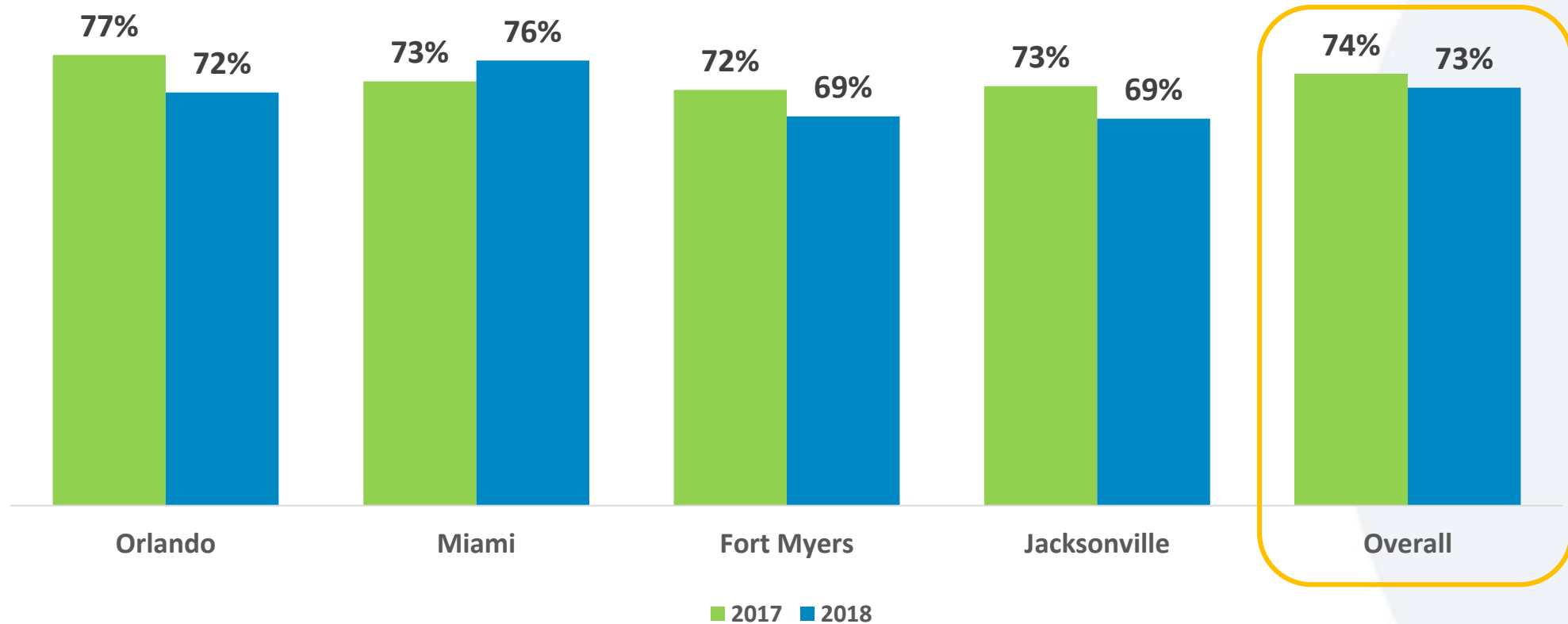
**The In-Marketing Campaign generated more than 142k incremental room nights for the entire Greater Tampa Bay area. Of those, 70k were overnight stays in Hillsborough County.*

Advertising Evaluation

03

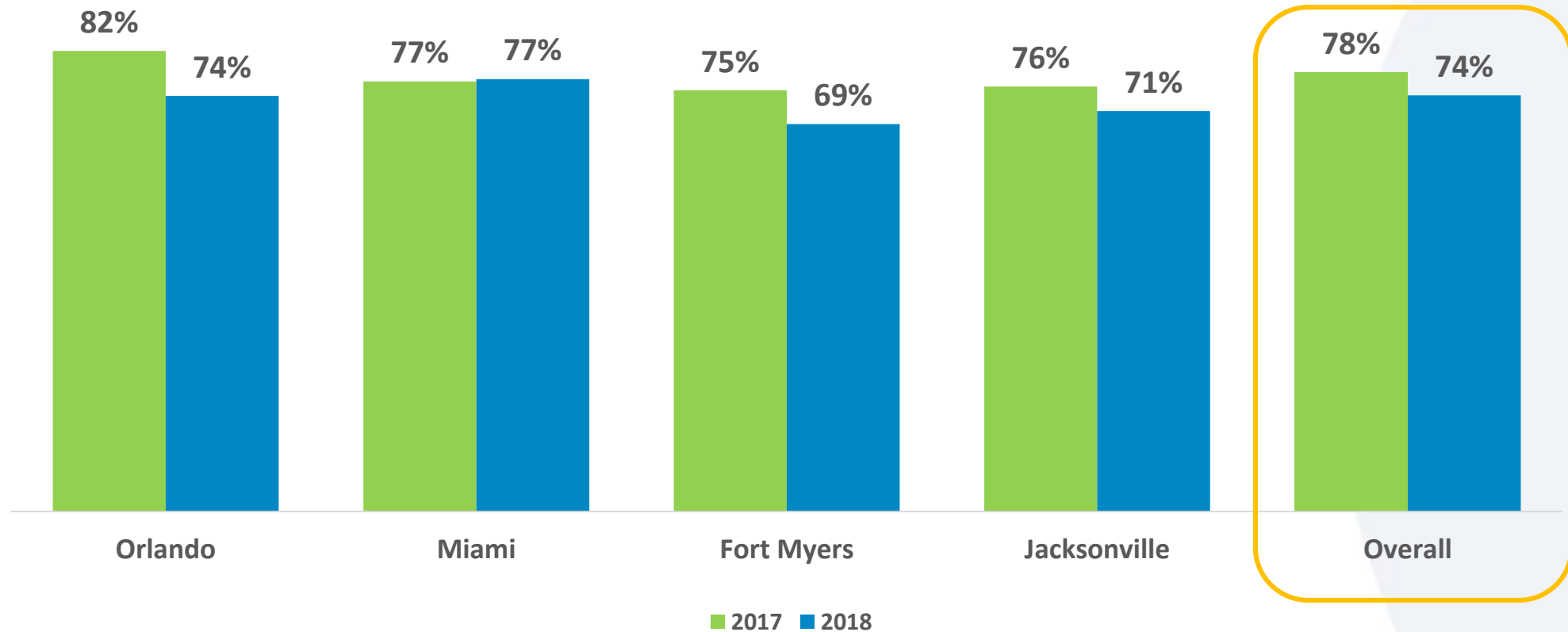
Appeal of the advertising among in-state markets stayed on-par overall, but saw some slight declines in several markets.

Likeability of Advertisements - % Top 2 Box

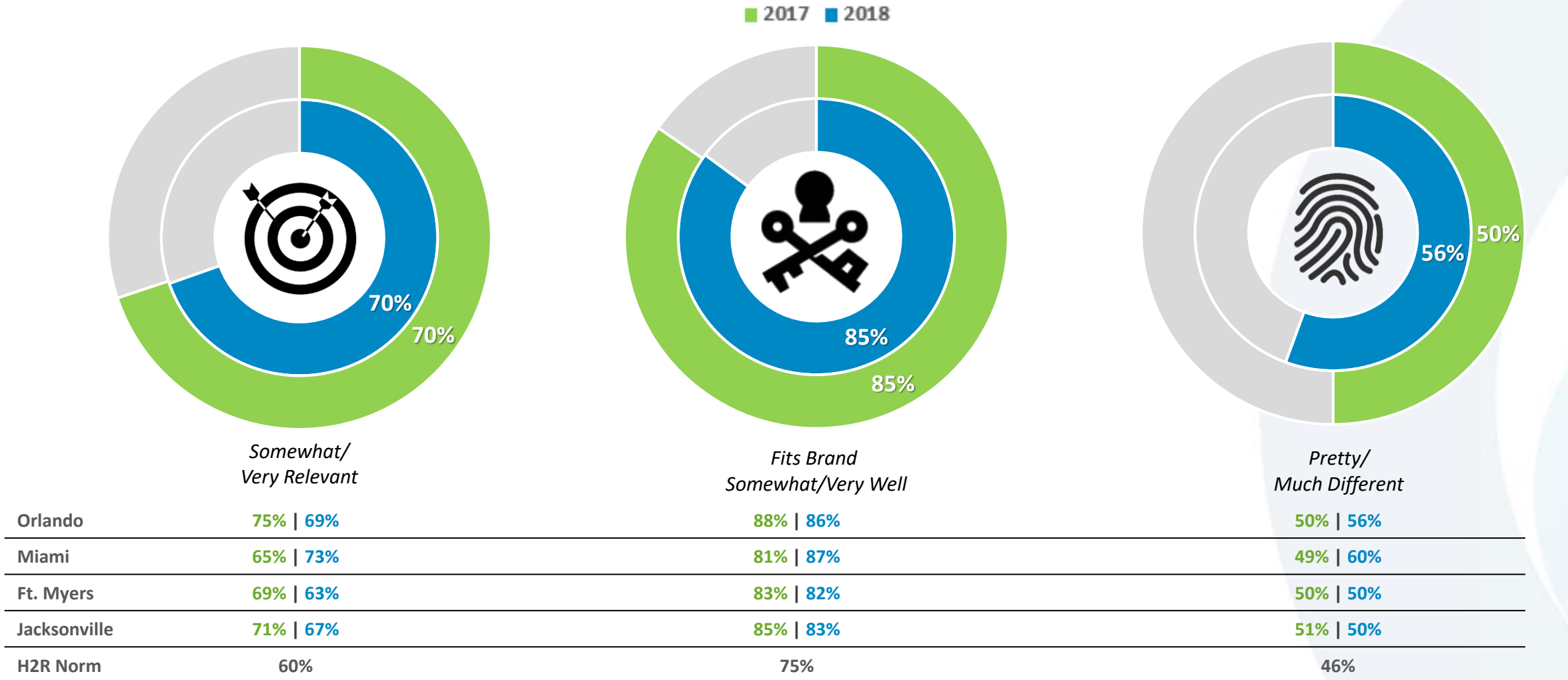


Tampa Bay's ads also had a positive impact on the appeal of Tampa Bay, a metric that reached 74% overall.

% Top 2 Box – Makes Tampa Bay Seem A Little/Much More Appealing



The relevance, brand fit and differentiation of Visit Tampa Bay's ads continue to score well, and top H2R Norms in each category.



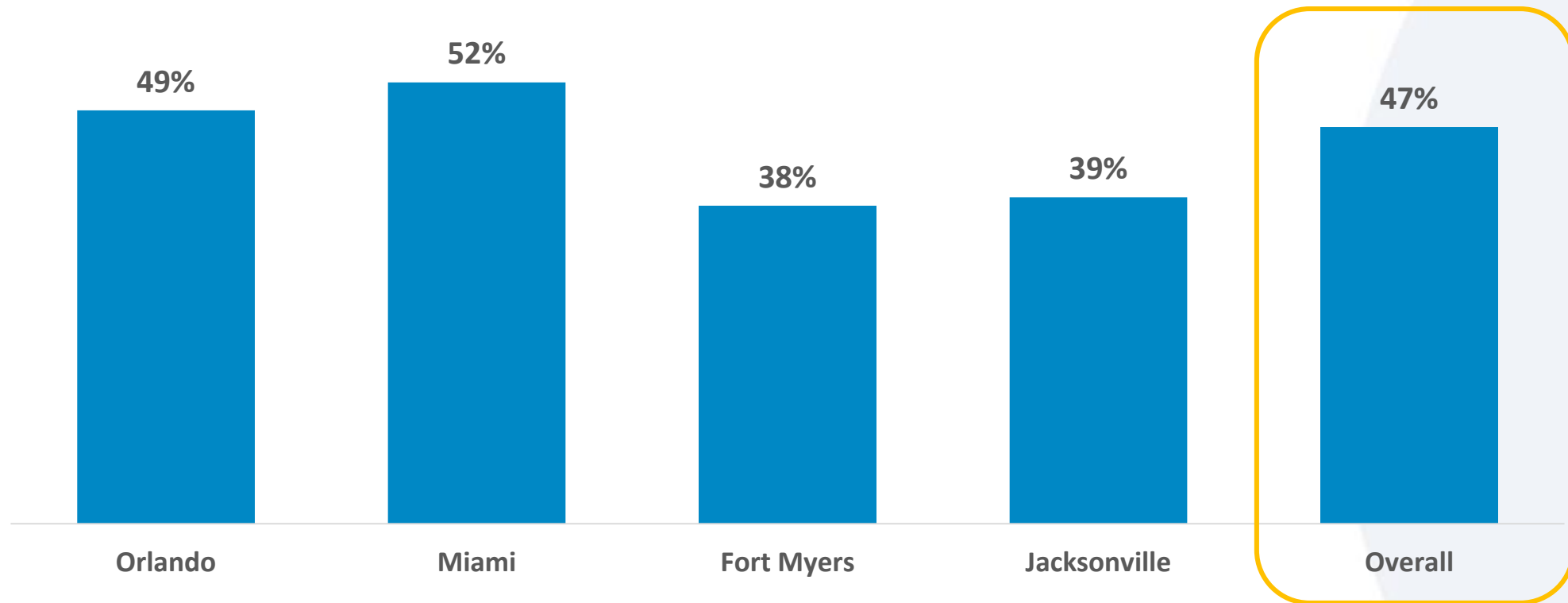
Q42: Using the scale provided, please rate how relevant the points made in these advertisements are to you.

Q43: Using the scale provided, please rate how well this advertisement fit with what you think about Tampa.

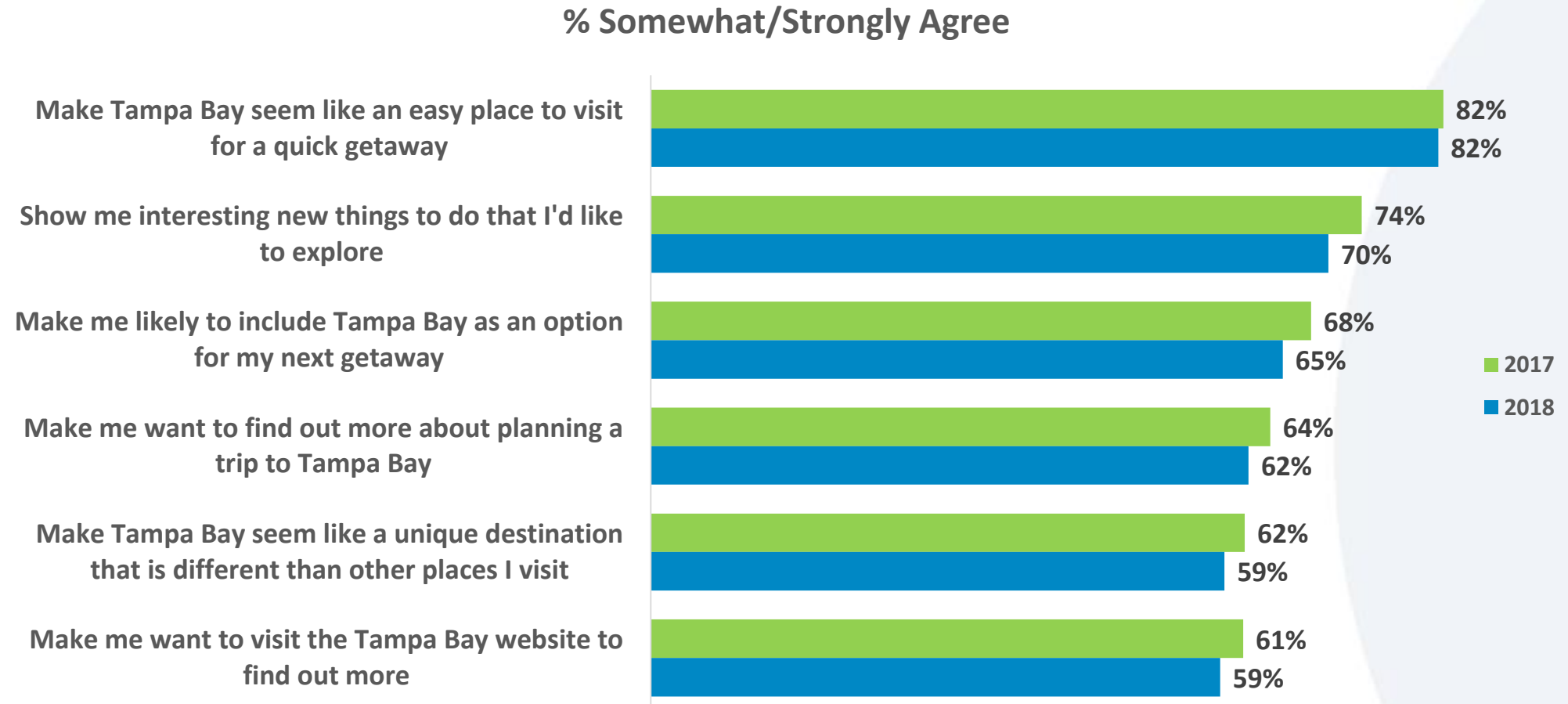
Q44: Using the scale provided, please indicate how different this advertisement is from other advertising you've seen for destinations.

Nearly half of travelers in the in-state markets indicated they would be able to recognize the ads as being for Tampa Bay if the logos were removed.

% Top 2 Box – Pretty/Very Easy to Know It's Tampa Without Logos



Traveler message takeaways also resonated strongly in this year's campaign.



Q46: Based upon the message you took away from the advertisements you just reviewed, please indicate the degree to which you agree that these ads.

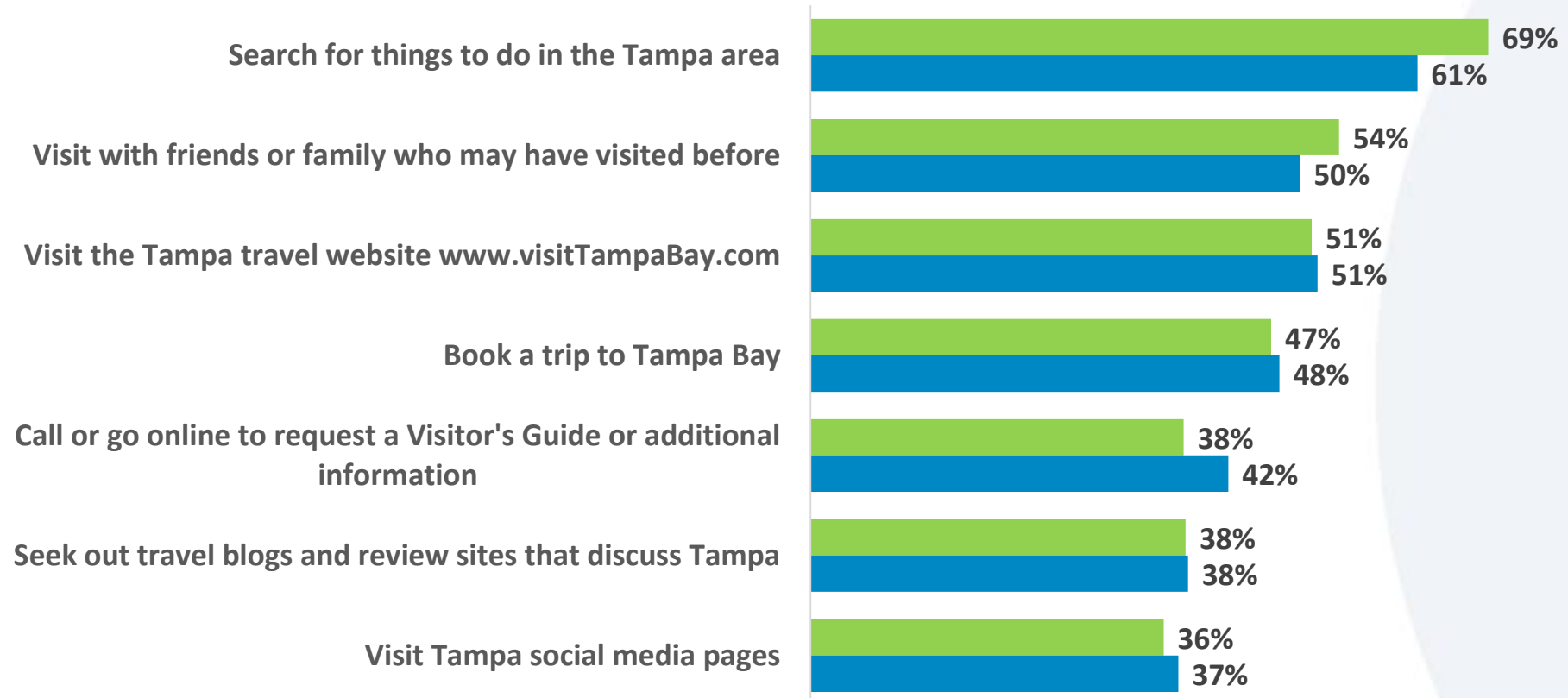
Miami consistently rates the Tampa ads highest across many of the advertising message takeaways, while Ft. Myers is consistently rating takeaways lower.

	Overall	Orlando	Miami	Ft. Myers	Jacksonville
Make Tampa Bay seem like an easy place to visit for a quick getaway	82%	81%	83%	81%	80%
Show me interesting new things to do that I'd like to explore	70%	68%	74%	67%	69%
Make me likely to include Tampa Bay as an option for my next getaway	65%	67%	68%	59%	62%
Make me want to find out more about planning a trip to Tampa Bay	62%	62%	65%	56%	60%
Make Tampa Bay seem like a unique destination that is different than other places I visit	59%	58%	62%	52%	61%
Make me want to visit the Tampa Bay website to find out more	59%	59%	61%	53%	59%

Q46: Based upon the message you took away from the advertisements you just reviewed, please indicate the degree to which you agree that these ads.

The advertisements are pushing more people to the official travel website, to book a trip, to request additional information and to visit Tampa social media pages

% Probably/Definitely Would

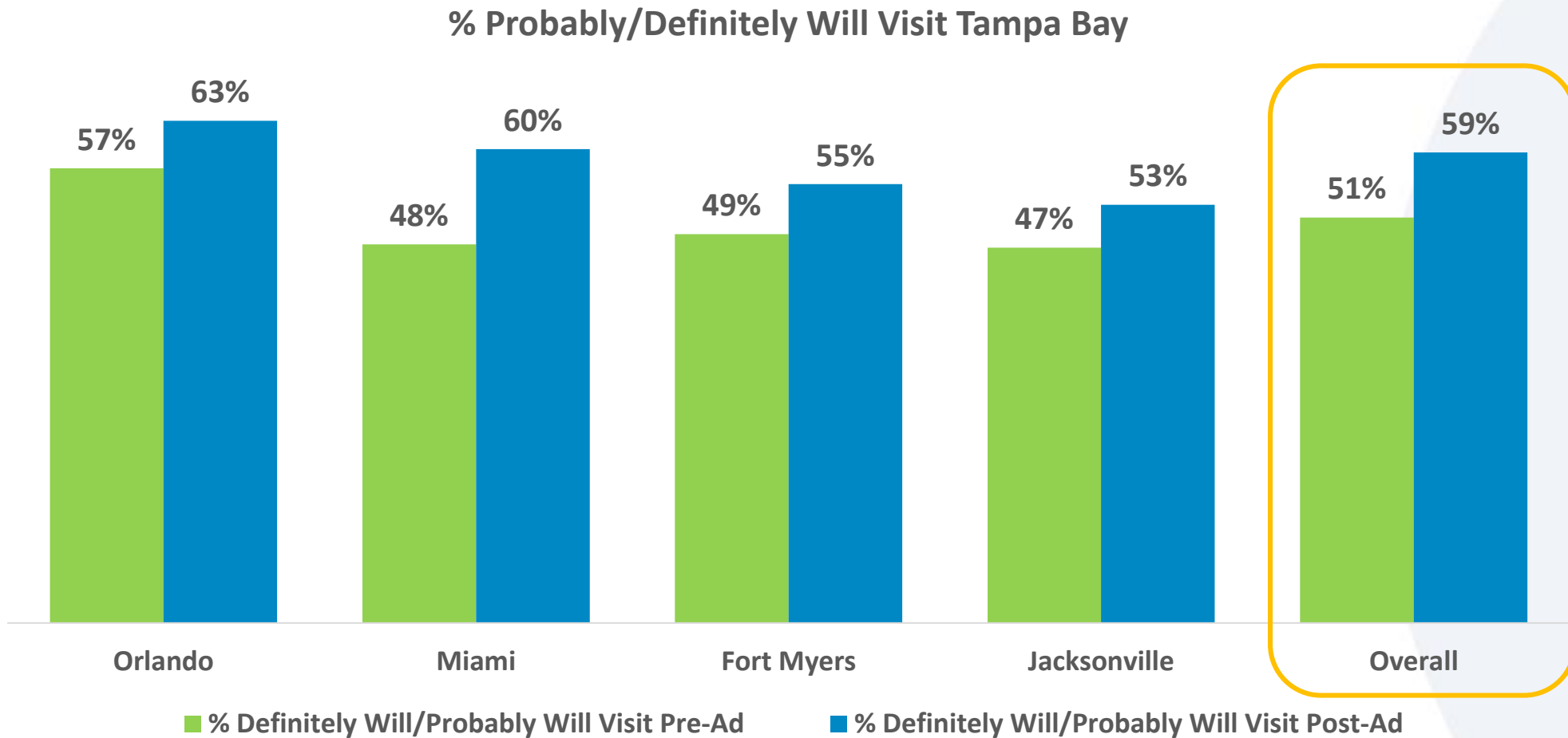


Q47: After reviewing these ads, how likely would you be to take each of the following actions?

Additionally, travelers from Miami are most likely to take action after seeing the advertisements.

	Overall	Orlando	Miami	Ft. Myers	Jacksonville
Search for things to do in the Tampa area	61%	61%	64%	56%	61%
Visit with friends or family who may have visited before	51%	50%	56%	41%	50%
Visit the Tampa travel website www.visitTampaBay.com	50%	50%	55%	37%	46%
Book a trip to Tampa Bay	48%	46%	53%	39%	45%
Call or go online to request a Visitor's Guide or additional information	42%	38%	50%	34%	40%
Seek out travel blogs and review sites that discuss Tampa	38%	32%	49%	29%	32%
Visit Tampa social media pages (i.e., Facebook, Twitter, Instagram, etc.)	37%	31%	48%	27%	32%

Post-exposure intent generated positive lift in all four advertised markets, and averaged +8 points overall.



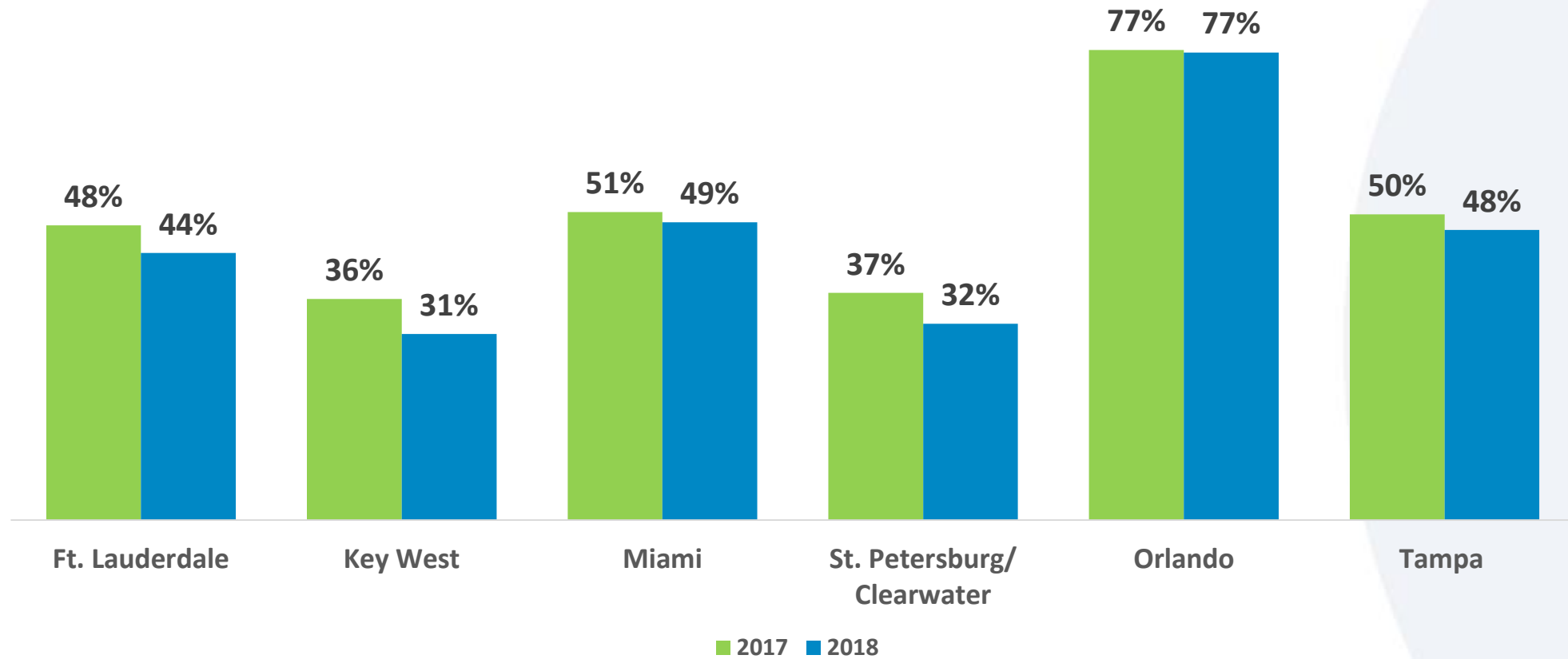
Q15: Using the scale provided, please indicate how likely you are to visit each of the following destinations in the next 12 months.
Q48: Using the scale provided, please indicate how likely you are to visit the Tampa area in the next 12 months?

Tampa Bay Traveler Profile

04

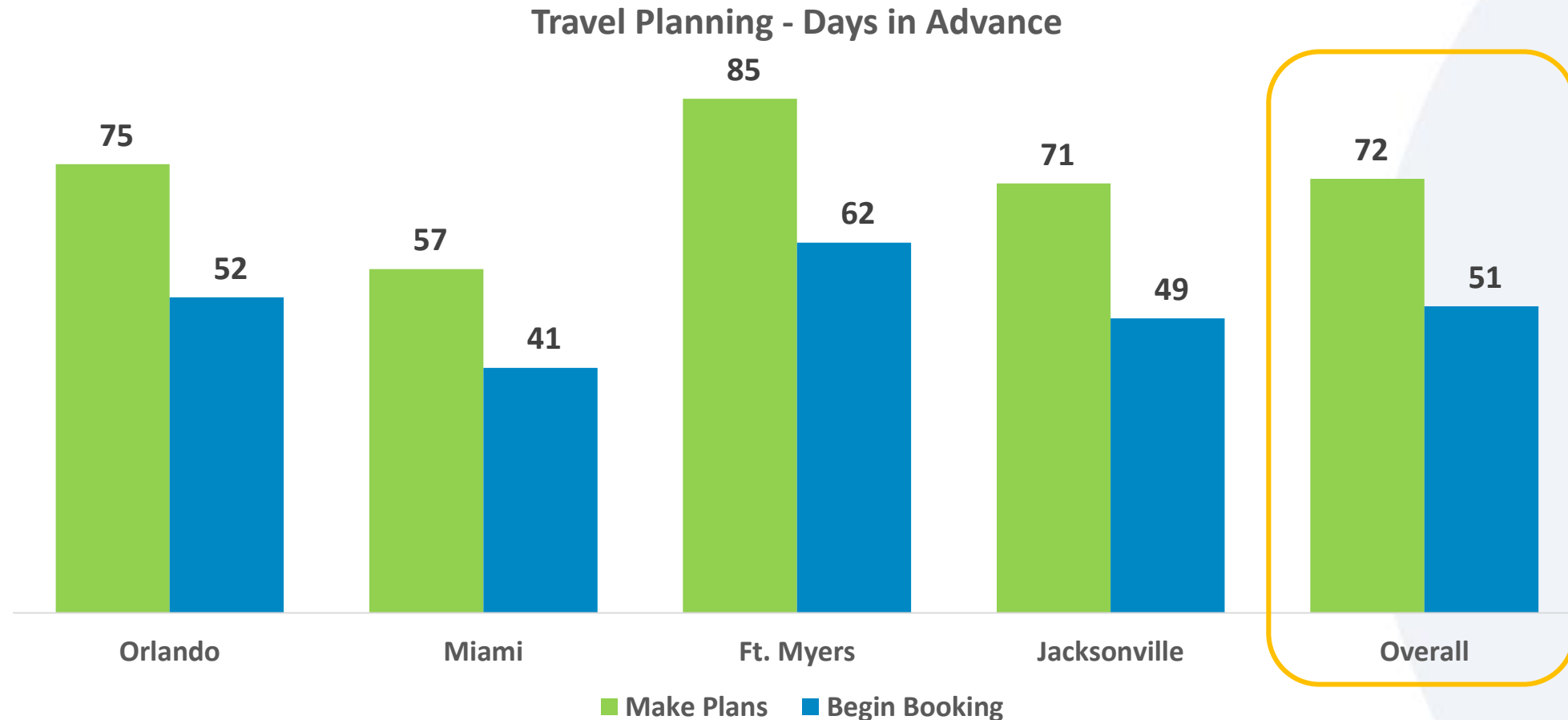
In-State travelers visited destinations in the area in smaller numbers this year, with the exception of Orlando which maintained it's visitation levels.

Destinations Visited in the Past 3 Years



Q14: Please indicate which of these destinations, if any, you have visited in the past 3 years.

Similar to previous years, travelers begin thinking about where they would like to travel 72 days prior to their trip and begin booking accommodations 51 days in advance.



Q9: How many days in advance do you normally begin to consider making a decision on where you will travel on a leisure trip? Q10: How many days in advance do you normally begin booking your travel accommodations once you've made a decision on where to visit?

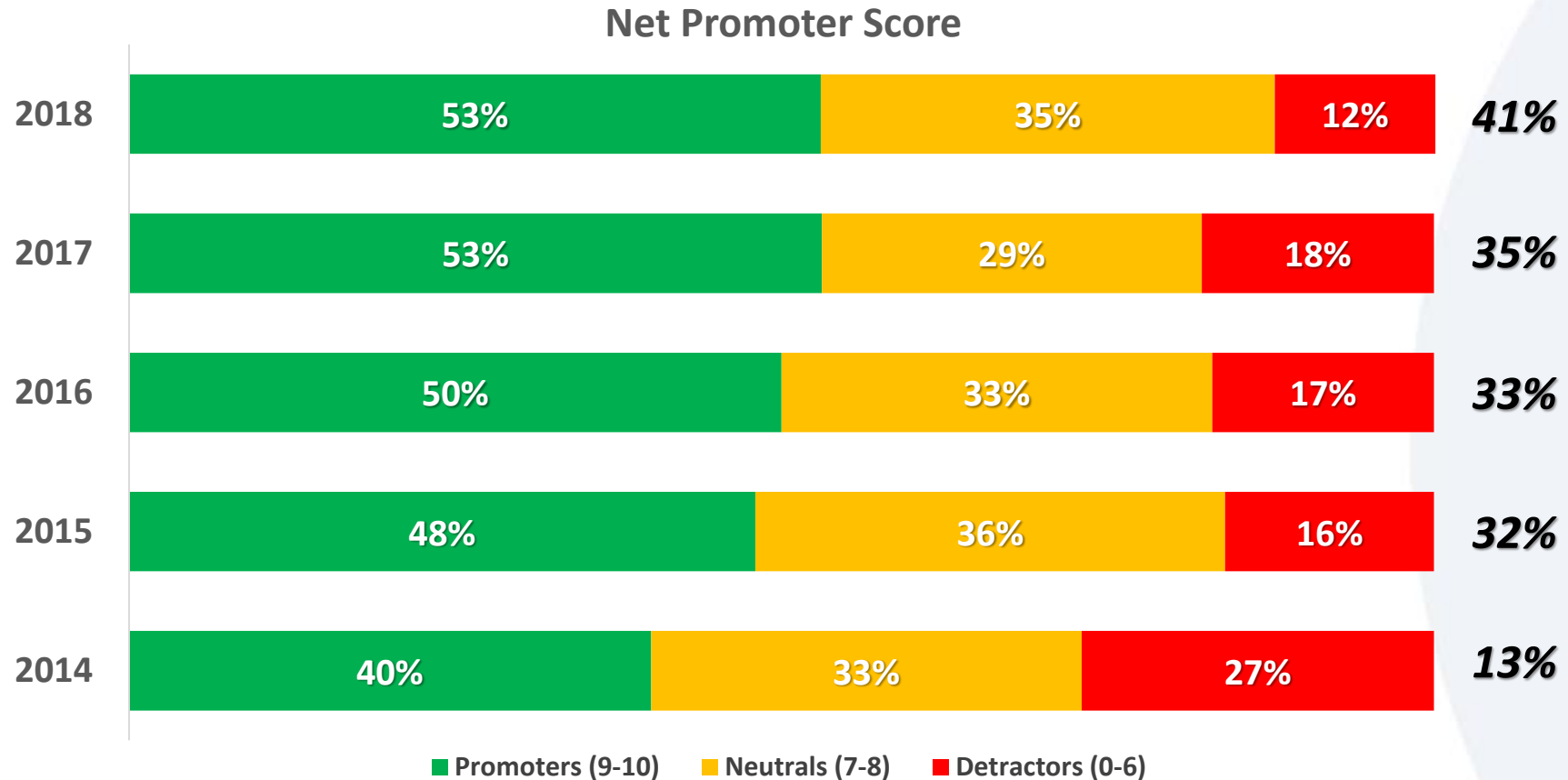
Tampa remains in the top 10 destinations that in-state travelers first think of as places they enjoy visiting.



Rank	Destination	Awareness
1	Beaches	9.3%
2	Disney	6.6%
3	Orlando	6.6%
4	Key West	4.5%
5	St. Augustine	2.9%
6	Miami	2.8%
7	New York	2.6%
8	Florida	2.5%
9	Tampa	2.5%
10	Universal	2.3%
11	Hawaii	1.9%
12	California	1.8%
13	Daytona	1.7%
14	Savannah	1.7%
15	Las Vegas	1.6%
16	SeaWorld	1.5%
17	Atlanta	1.2%
18	New Orleans	1.1%
19	Caribbean	0.9%
20	Naples	0.8%

Q8: When you think of places you have visited, or would enjoy visiting, for leisure that are located in your region, which destinations first come to mind?

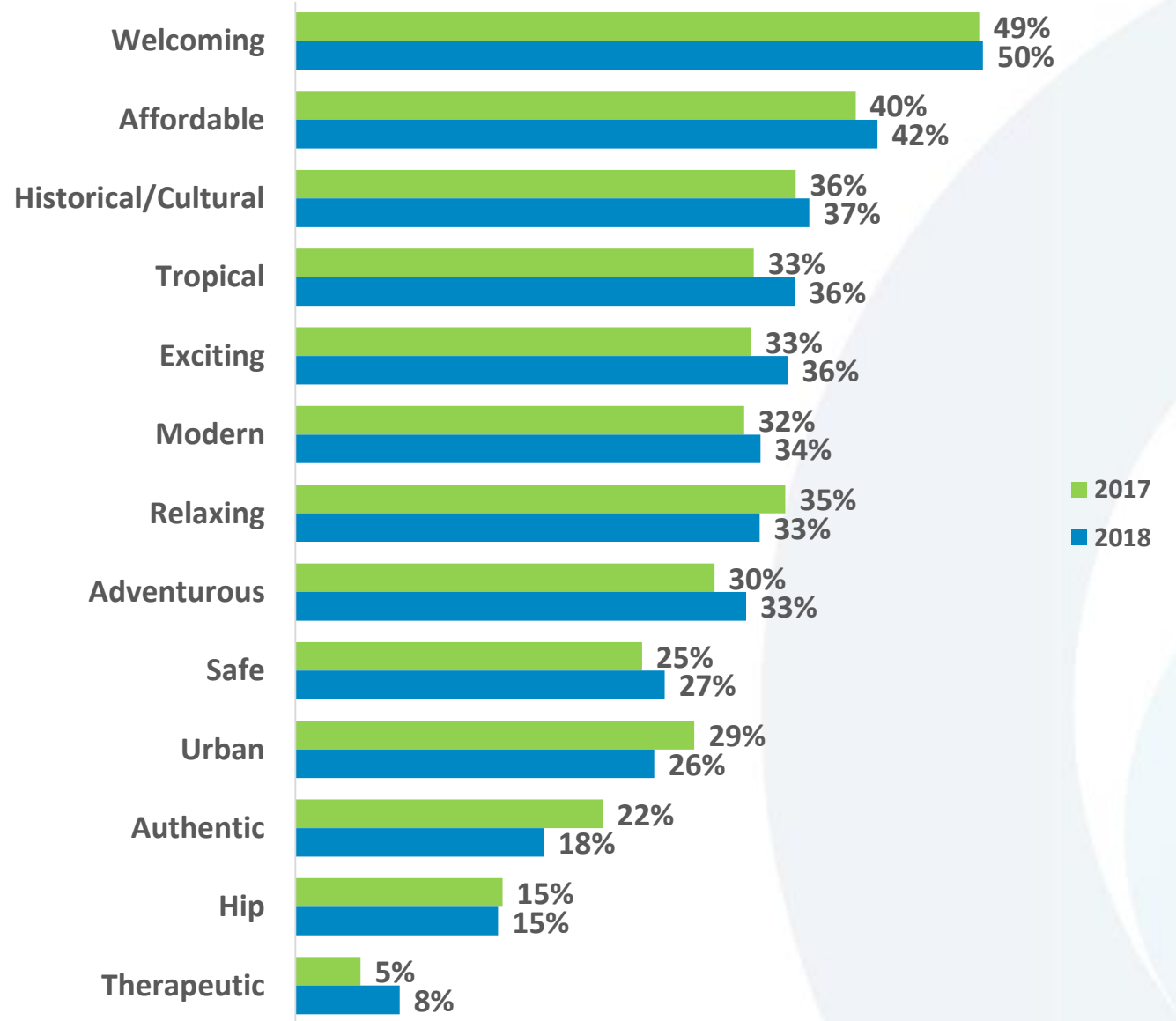
The NPS for Tampa increased by 6 points this year, driven by a 6 point decline in the number of detractors.



Tampa Bay Characteristics

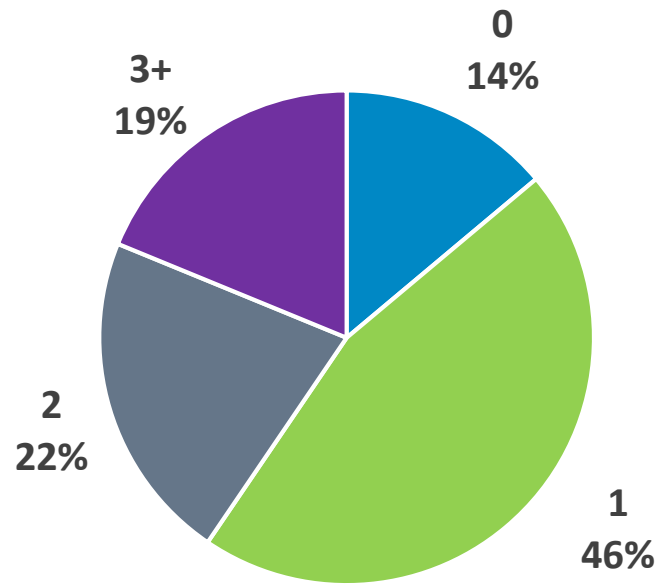
The top characteristics used to describe Tampa continue to be *Welcoming* and *Affordable*.

Nearly all characteristics used to describe Tampa remained statistically on par with 2017 scores. The only exception being a slight decline in those believing that Tampa is Authentic (-4 pts).

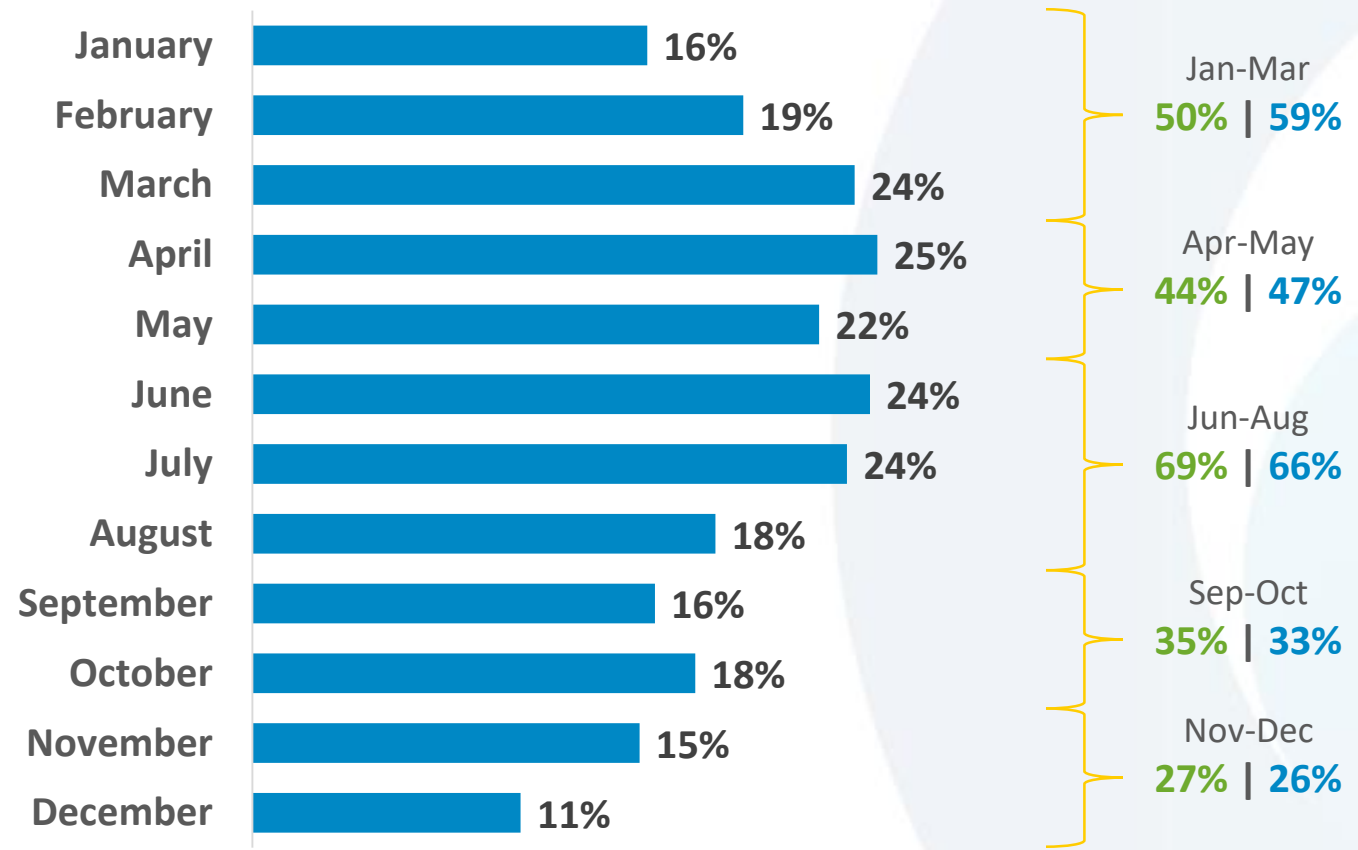


In-State visitors continue to make 2 trips to the area per year. However, over the past three years, the time of year has begun to shift earlier, rather than during the summer/fall months.

Number of Trips in Past 12 Months – 2.0



Months Visited Tampa Bay in the Past 3 Years

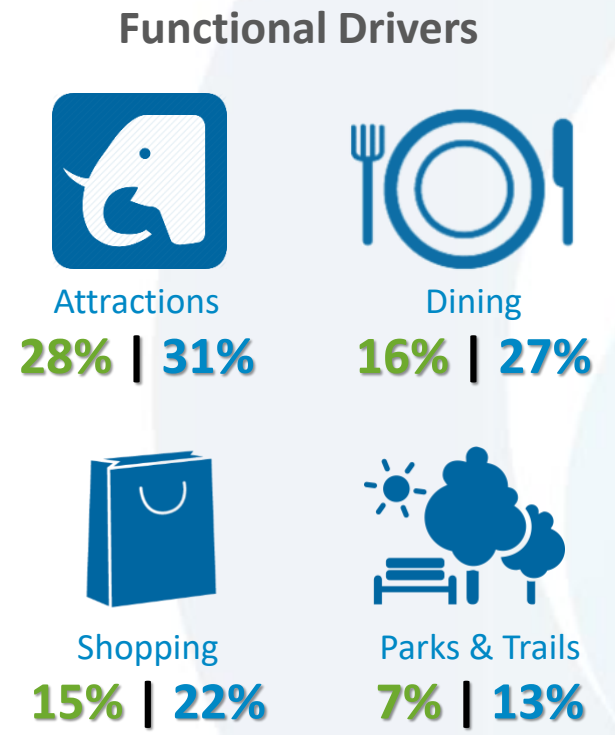
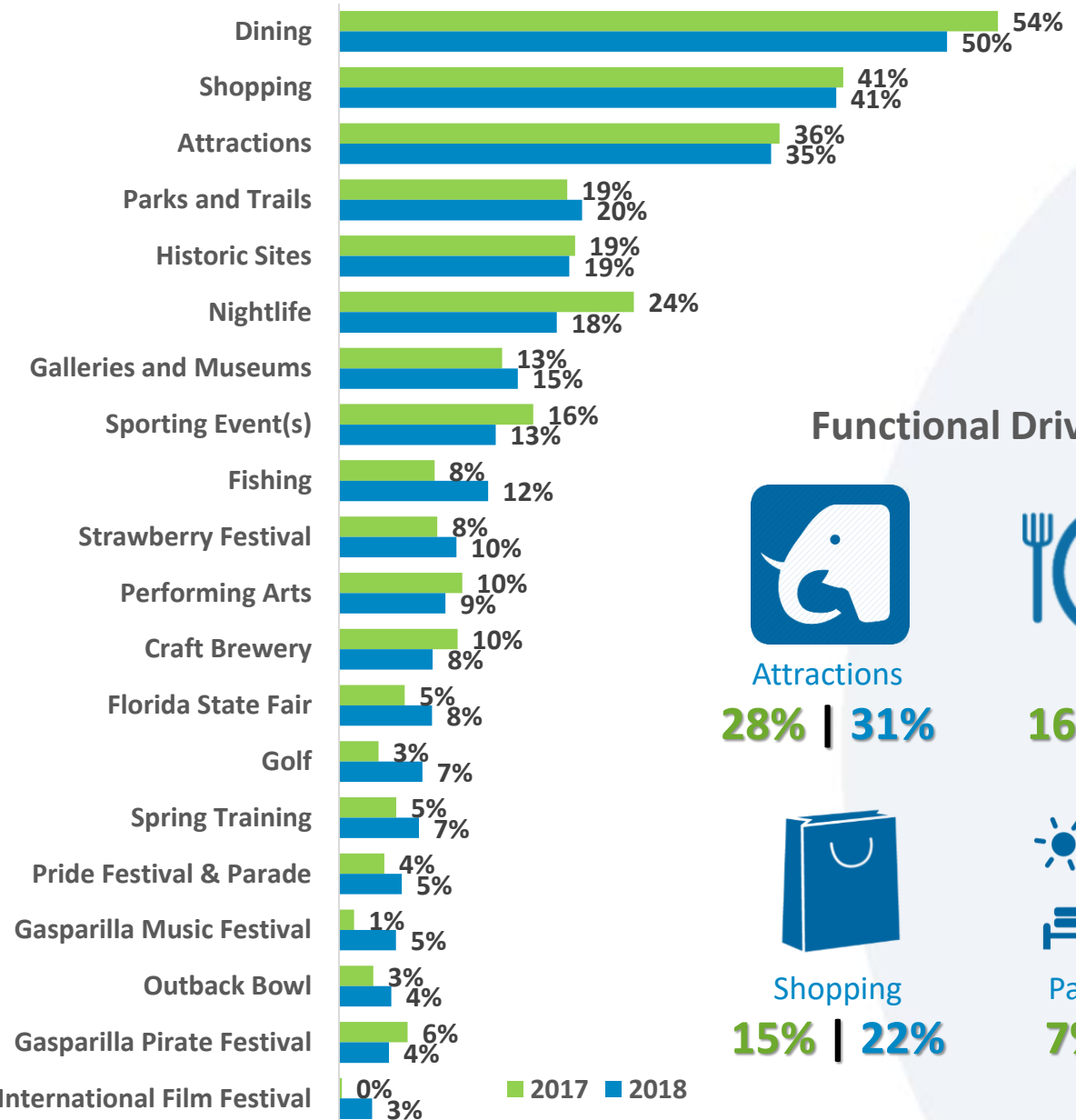


Q18: In the past 3 years, which months have you visited Tampa?
 Q19: How many trips do you make to the Tampa area in the past 12 months?

Area Activity Participation

The mix of area activities that visitors participate in has not changed much in several years. Dining, Shopping and Attractions continue to be the most popular.

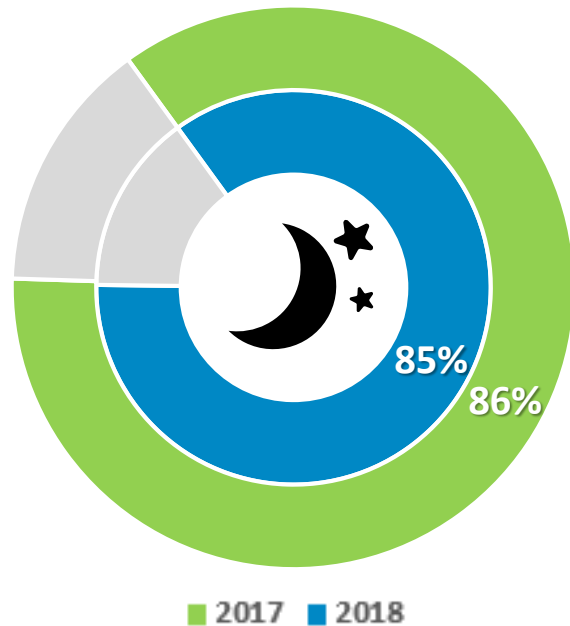
Attractions, Dining and Shopping are also the top three functional drivers that influence in-state travelers to visit the area. However, parks and trails broke into the top 4 drivers this year. Sporting events that used to drive visits dropped to 8th place behind Historic Sites, Galleries and Museums and Nightlife.



Q20: Which of the following activities or experiences, if any, did you participate in on your most recent visit to the Tampa area? Q21: Of these activities, please indicate if there were any that were a major influence in your decision to visit Tampa on this most recent trip.

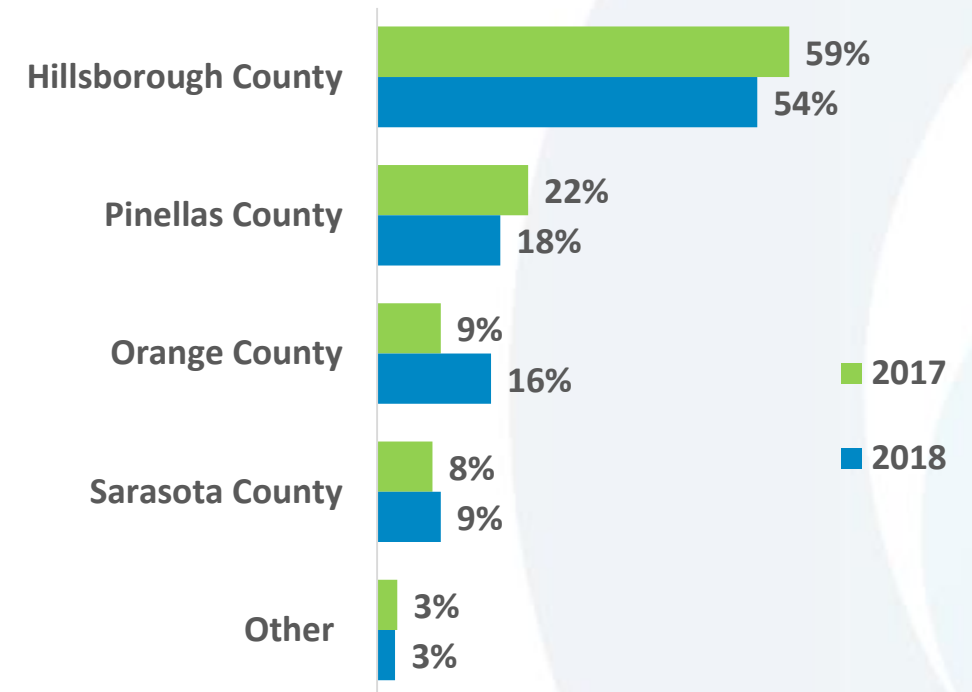
Similar to last year, 85% of visitors stayed overnight on their trip to the area for an average of nearly 3 nights. Hillsborough County remains the most popular area in Tampa Bay to spend the night.

Stay Overnight



2.3 | 2.6
Nights in the Area

City/Area Stayed In



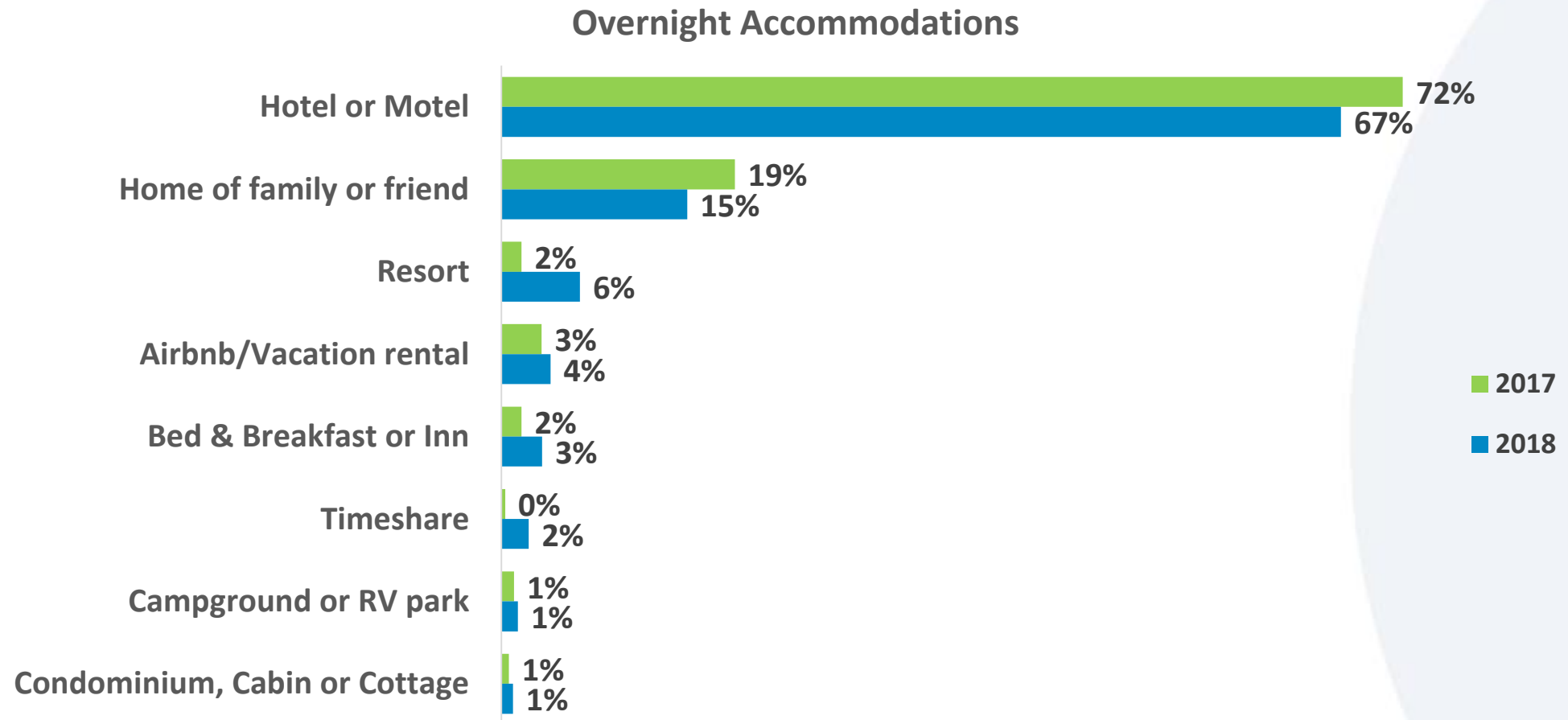
RESPONDENT BASE: TAMPA BAY VISITORS PAST 3 YEARS | N=598

RESPONDENT BASE: ALL OVERNIGHT VISITORS | N=493

Q23: How many nights did you spend in the area on this trip?

Q24: In which of the following cities/areas did you spend the night on your most recent visit to the Tampa area?

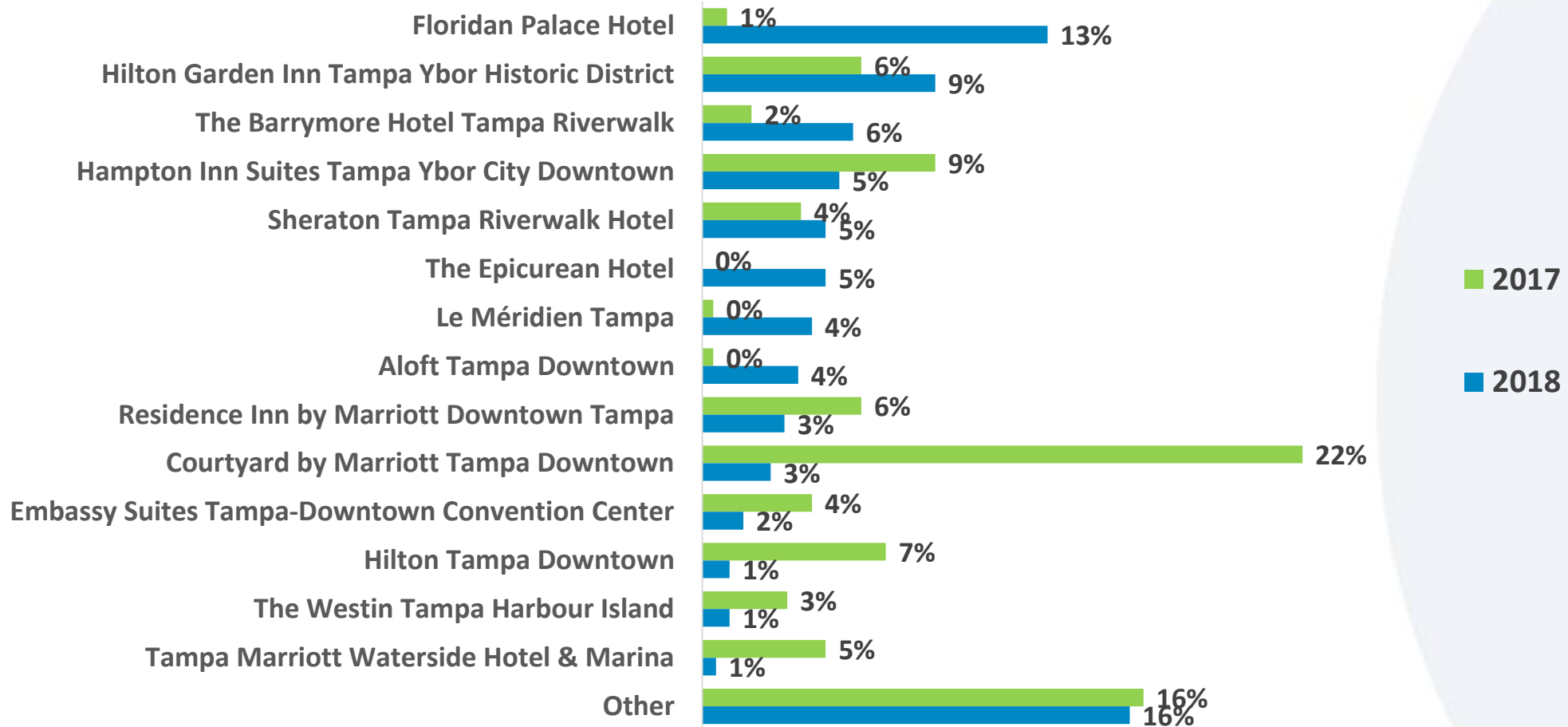
Overnight accommodation choices have remained similar for several years, only seeing small shifts this year. Hotels continue to be the most popular choice.



Q25: Which of the following best describes the type of accommodations you used on your most recent trip?

Downtown hotel usage varies significantly year over year, with Floridan Palace Hotel seeing a significant increase and Courtyard seeing a significant decline in reported bookings.

Downtown Hotels Used



Q26: Which of the following downtown hotels, if any, did you use for your overnight accommodations in Tampa in your most recent visit?

Among in-state visitors, Brand Advocates tend to be slightly older, more likely to have children, earn a little less money, are less educated and slightly less likely to speak Spanish than the average visitor this year.

	Visitors Since April 2018	Prospects*	Brand Advocates**
Respondent Age	46	46	47
Children in the Home	40%	43%	43%
No Children	60%	57%	57%
HH Income	\$73.9k	\$75.3k	\$70.9k
Distance	125 miles	138 miles	127 miles
% College Graduate +	50%	51%	43%
Bilingual (English & Spanish)	11%	12%	10%

*Prospects are non-visitors who intend to visit the area after viewing the ads.

**Brand Advocates are visitors who rated NPS for Tampa Bay 9 or 10 and will probably/definitely return.

Thank You!



Reveal Your Customer's Full Experience

**4650 S. National Ave, Suite C1
Springfield, MO 65810**

417.877.7808

@H2RMktResearch