

# H2R Market Research

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*Reveal Your Customer's Full Experience*

**Visit Tampa Bay  
2019 In-State Campaign  
Marketing & Media Effectiveness Research**

*Delivered October 2019*

# Overview

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**Purpose.** The purpose of this study is to measure the incremental impact Tampa Bay's In-State Marketing Campaign had upon 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 and Ft. Myers. The research was conducted in September 2019 to capture the travel and spending that was generated as a direct result of this year's 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 +/-4.9% per individual market. Due to the large Margins of Error by market, the results by market should be used for directional purposes only.

An aerial photograph of the Tampa skyline at sunset. The sky is a mix of orange, pink, and blue. Several skyscrapers are visible, including the Sun Life Tower with its distinctive blue-tinted glass facade. In the foreground, there are lush green palm trees and a multi-lane highway with orange traffic cones. A semi-transparent dark grey triangle is overlaid on the left side of the image, containing the text.

Visit Tampa Bay In-State Marketing & Media Effectiveness

# Executive Summary

## OOH Advertising Drives Awareness

- Visit Tampa Bay continues to run an effective In-State Marketing Campaign that drives incremental visitation to the area at an efficient cost delivering a return on investment. The combination of TV, Out of Home (OOH) and Digital advertising was the right mix to drive visitation to Tampa Bay from its in-state target markets. The 2019 In-State Campaign reached 48% of the households in the target markets of Orlando, Miami and Ft. Myers equating to 1.4M households. This reach is on par with last year's 1.6M households reached across *four* markets (instead of just three this year).
- Once again, OOH advertising generated the highest level of awareness (39%)—a 3-point increase over 2018, and up 10 points since OOH began for the In-State Campaign in 2016. This included a combination of Gas Station TV, Digital Outdoor Bulletins and Transit Bus/Carvertise ads. TV advertising awareness followed closely (32%) but is down 3 points compared to last year. Digital awareness was also strong at 31% and was up 3 points compared to last year.
- The 2019 In-State Campaign efficiently reached the households in the target markets with a Gross cost of just \$0.23 per aware travel household (Net: \$0.22). This is slightly higher than 2018 (Gross & Net: \$0.21) but was expected with the slightly smaller gross market reach created by having one less market this year.



## Visitor Spending Increases

- While reaching households with the marketing message is important, driving visitation to Tampa Bay that would not have occurred otherwise is the true objective. The 2019 In-State Campaign delivered a +2.3% increment this year translating to 33k Incremental Trips to the Tampa Bay area. This increment is on par with the In-State Historical Average of 2.2%; and, the number of Incremental Trips outpaced the Historical Average of 26.5k.
- Incremental visitors to the Tampa Bay area spent an average of \$850 per party—up from the \$682 spent last year, and higher than the Historical Average of \$669. Extrapolated across Incremental Trips, it reveals the 2019 In-State Campaign generated more than \$28M in Incremental Travel Revenue. This is the second highest level of incremental spending generated from an In-State Campaign – behind only last year’s \$32M. Furthermore, the 2019 In-State Campaign generated a Gross ROI of \$86 and a Net ROI of \$89.
- This year’s campaign also helped benefit the local economy by generating more than 49k Incremental Room Nights for Hillsborough County alone and more than 105k room nights were generated for the greater Tampa Bay area.



# Ads Resonate and Inspire Action

- The 2019 In-State Campaign continued to resonate with in-state travelers. The ads remain relevant (69%) and continue to fit the Tampa Bay brand (85%)—both topping the In-State Historical Average in their respective categories. Travelers from Orlando and Miami find the ads most relevant (71%), while those from Ft. Myers found the ads slightly less relevant (62%). The score for differentiation dropped slightly from 56% to 50% this year; but, remains above the Historical Average of 47%. Travelers from Miami felt the ads were most differentiated (54%).
- More than four in ten Travelers indicated they could tell the ads were for Tampa Bay, even if the logos/names were removed. This is down 5-points from last year—similar to the decline in the score for differentiation. However, the ads continue to make Tampa Bay seem like an easy place to visit for a quick getaway (80%) and show In-State Travelers new things to do and explore (70%). The ads also continue to inspire action, as they are generating Lift in intent to visit Tampa Bay in the future. Overall Lift reached +9 points, with the largest Lift seen among Orlando travelers (+11pts).
- This year, those who indicated they are bilingual with both English and Spanish languages were given the opportunity to review the Spanish-Language ads. More than three-quarters of these Travelers found the ads appealing (76%), comparable to the English ads (73%). Furthermore, 82% said the ads made Tampa Bay seem more appealing, significantly higher than the 73% who said the same about the English ads. Finally, 81% of Bilingual Travelers found the ads relevant, compared to just 69% of Travelers who indicated the same about the English ads.



# Tampa Bay In-State Campaign

## Key Performance Indicators (KPI) Summary

Tampa Bay's 2019 In-State Marketing Campaign generated more than 33k Incremental Trips to the area since April, and more than \$28M in Incremental Tourism Spending during that same time frame.

Visit Tampa Bay decreased their investment in Jacksonville this year; therefore, it is not included in the measurements for 2019. Even so, there was higher awareness of Visit Tampa Bay ads in the three markets (Orlando, Miami and Ft. Myers) than the 4 markets last year.

Market reach continues to out-pace the In-State Historical Average and Incremental Visitation and Revenue were still strong from these three markets. The In-State Campaign also remained efficient at less than a quarter per household to reach and the ROI remained strong compared to the In-State Historical Average.

Key Performance Indicators	2018 Campaign*	2019 Campaign*	Tampa In-State Historical Average
Aided Awareness	45.6%	48.3%	37.9%
Aware Households	1.6M	1.4M	1.2M
Incremental Visitation	+2.9%	+2.3%	+2.2%
Incremental Trips	+46.5k	+33.3k	+26.5k
Incremental Revenue	+\$31.7M	+\$28.3M	+\$18.4M
Gross Media Investment	\$334k	\$329k	\$229k
Gross Cost/Aware Household	\$0.21	\$0.23	\$0.21
<b>Gross Return on Investment</b>	<b>\$95</b>	<b>\$86</b>	<b>\$80</b>
Net Media Investment	\$325k	\$318k	\$211k
Net Cost/Aware Household	\$0.21	\$0.22	\$0.19
<b>Net Return on Investment</b>	<b>\$98</b>	<b>\$89</b>	<b>\$97</b>

\*Advertised markets differed from 2018 to 2019; therefore, results in 2019 do not include the Jacksonville market throughout this report.

Visit Tampa Bay In-State Marketing & Media Effectiveness

# Marketing Efficiency





# Marketing Efficiency

## KEY PERFORMANCE INDICATORS



**48%**

of travelers have  
seen/heard a Tampa  
Bay advertisement  
(vs. 38% Hist. Avg.)



**1.4M**

households were  
reached by Tampa  
Bay's advertising  
(vs. 1.2M Hist. Avg.)



**\$329k**

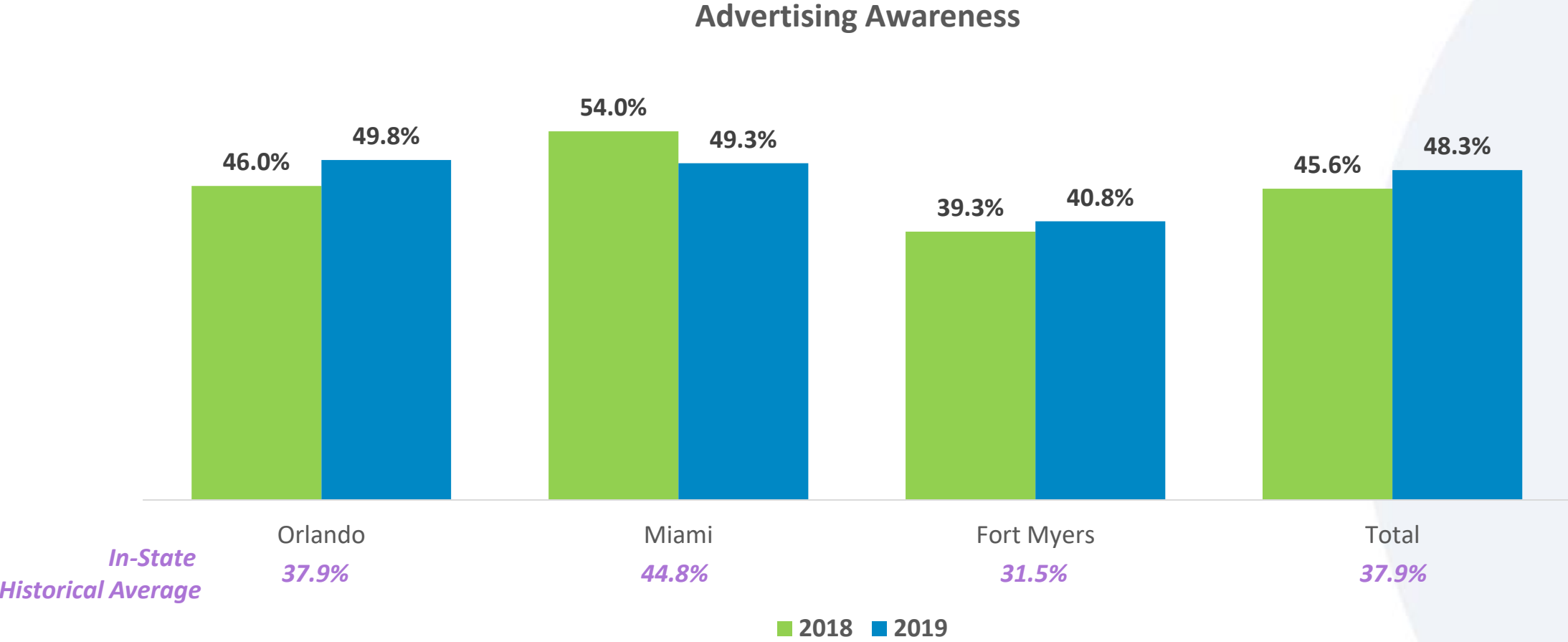
spent on advertising in  
the target markets  
(vs. \$229k Hist. Avg.)



**\$0.23**

spent to reach each  
aware household in the  
target markets  
(vs. \$0.21 Hist. Avg.)

Overall awareness increased by nearly 3 points this year, falling in line with 2016 (49%) and 2017 (48%) levels. While there were notable shifts by market, advertising awareness was above the In-State Historical Average across all markets.



# Market Reach (Aware Traveler Households)

Tampa Bay's In-State Marketing Campaign generated a Market Reach of 1.4 million traveler households, 200k higher than the Historical Average.

Market Reach increased in Orlando and Ft. Myers but declined slightly in Miami. This provided for a Total Market Reach that was slightly lower than last year – but, Jacksonville was not surveyed in 2019.

Market Reach	2018 Market Reach	2019 Market Reach	Tampa In-State Historical Average
Orlando	542k	605k	472k
Miami	736k	650k	542k
Ft. Myers	161k	176k	143k
<b>Total Market Reach</b>	<b>1.6M</b>	<b>1.4M</b>	<b>1.2M</b>

# Media Expenditures

Visit Tampa Bay invested more than \$329k in Gross Marketing Expenditures across Orlando, Miami and Ft. Myers. This is within 1% of the total amount invested in 2018 across four markets.

Jacksonville was deleted to minimize the impact on advertising spend and was not included in the investments tallied for 2019.

Gross Media Expenditures	2018 Investment	2019 Investment	Tampa In-State Historical Average
Orlando	\$142,927	\$139,056	\$92,906
Miami	\$120,503	\$144,413	\$91,114
Ft. Myers	\$44,802	\$45,708	\$36,086
<b>Total Gross Spending</b>	<b>\$333,599</b>	<b>\$329,177</b>	<b>\$229,177</b>
Net Media Expenditures*	2018 Investment	2019 Investment	Tampa In-State Historical Average
Orlando	\$138,506	\$132,812	\$85,499
Miami	\$118,431	\$141,486	\$85,485
Ft. Myers	\$43,484	\$43,846	\$32,561
<b>Total Net Spending</b>	<b>\$324,570</b>	<b>\$318,145</b>	<b>\$211,209</b>

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

# Media Efficiency

The 2019 In-State Campaign was very efficient, costing less than one quarter per household.

The cost per aware household increased slightly this year, driven by an increase in Miami. The larger investment this year coupled with less reach caused Miami's Efficiency to decline somewhat. However, Orlando and Ft. Myers were both more efficient than last year and were on par with their In-State Historical Averages, providing for Total Efficiency that was excellent.

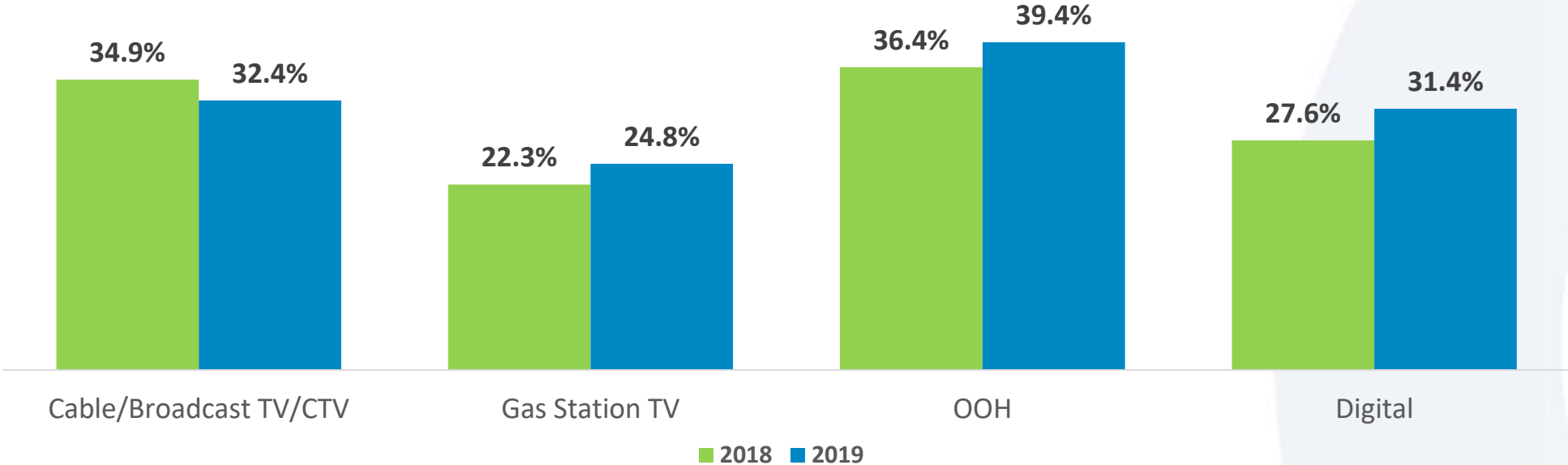
The benchmark for efficiency in the Tourism Industry is less than \$1.00, with anything less than \$0.50 considered excellent.

Gross Marketing Efficiency	2018 Efficiency	2019 Efficiency	Tampa In-State Historical Average
Orlando	\$0.26	\$0.23	\$0.20
Miami	\$0.16	\$0.22	\$0.16
Ft. Myers	\$0.28	\$0.26	\$0.26
<b>Total Spending</b>	<b>\$0.21</b>	<b>\$0.23</b>	<b>\$0.21</b>

Net Marketing Efficiency	2018 Efficiency	2019 Efficiency	Tampa In-State Historical Average
Orlando	\$0.26	\$0.22	\$0.18
Miami	\$0.16	\$0.22	\$0.15
Ft. Myers	\$0.27	\$0.25	\$0.23
<b>Total Efficiency</b>	<b>\$0.21</b>	<b>\$0.22</b>	<b>\$0.19</b>

# Out-of-Home (OOH) advertising once again generated the highest levels of awareness, increasing by 3 points over last year. Gas Station TV and Digital awareness also saw increases this year.

Advertising Awareness by Medium



	Cable/Broadcast TV/CTV	Gas Station TV	OOH	Digital
Orlando	32.9%	24.7%	39.8%	30.3%
Miami	34.2%	29.3%	43.0%	34.8%
Ft. Myers	25.8%	11.3%	27.0%	24.3%



Visit Tampa Bay In-State Marketing & Media Effectiveness

# Incremental Impact

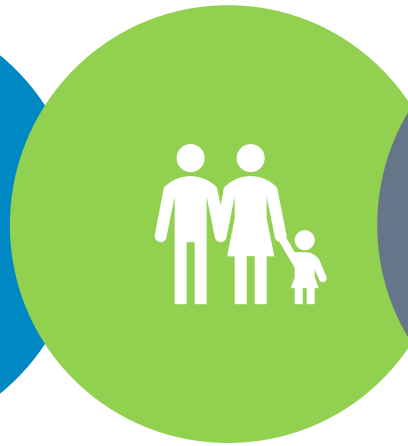
# Incremental Impact

## KEY PERFORMANCE INDICATORS



**33.3k**

incremental trips were generated by the In-State Campaign (vs. 26.5k Hist. Avg.)



**\$850**

spent by each incremental travel party in the area (vs. \$669 Hist. Avg.)



**\$28.3M**

incremental revenue was generated by the In-State Campaign (vs. \$18.4M Hist. Avg.)



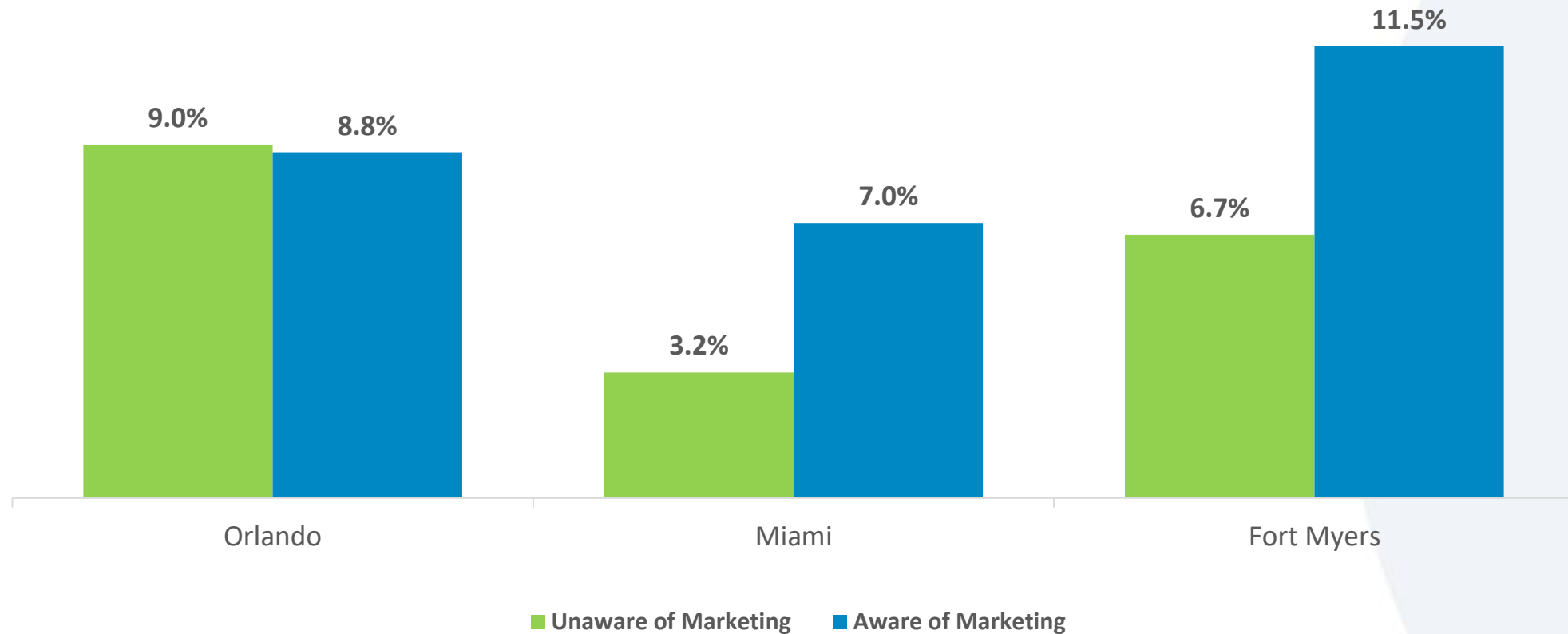
**\$86**

returned to the local economy for each dollar invested in the In-State Campaign (vs. \$80 Hist. Avg.)



# The In-State Campaign generated Incremental Visitation from Miami and Ft. Myers. However, those aware of ads in Orlando were just as likely to visit as those unaware of ads.

Visitation – Aware vs. Unaware Households



# Incremental Travel

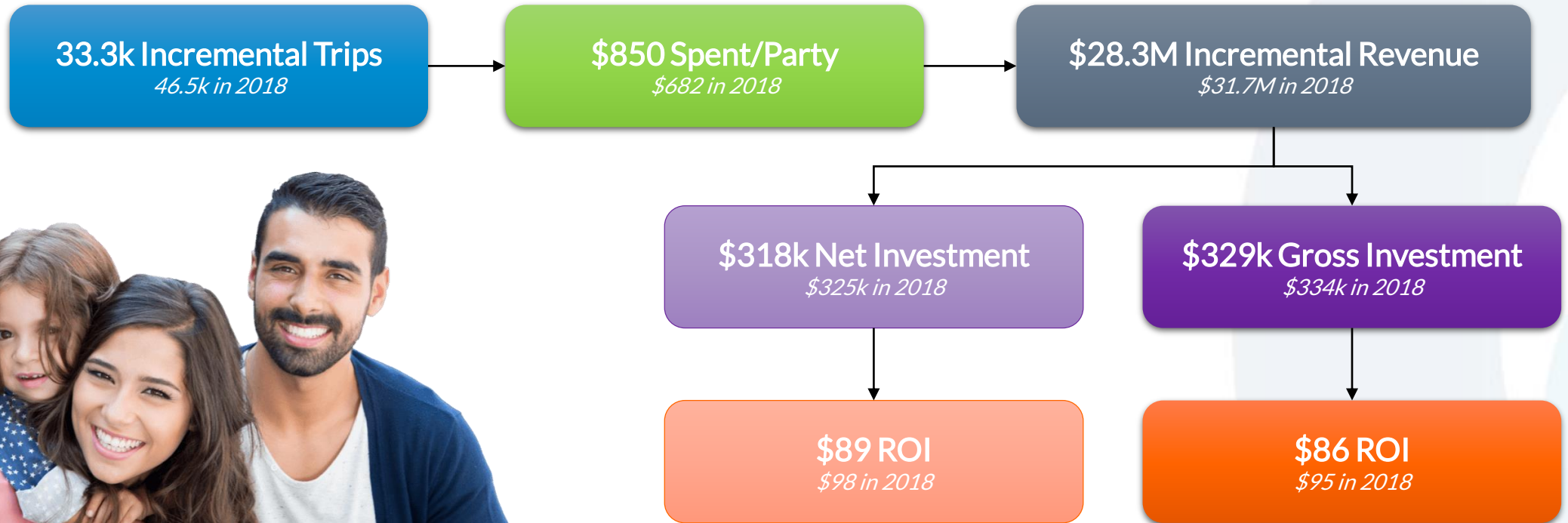
Total Incremental Travel reached 2.3% this year. After a record year in 2018, this year falls more in line with the In-State Historical Average.

Incremental Visitation generated from Miami and Ft. Myers was even higher than last year, which translated into more than 33k Incremental Visits to the area. Conversely, the In-State Campaign did not generate any Incremental Visits from Orlando this year indicating that those who didn't see ads were just as likely to visit the area as those who did see ads in Orlando this year.

Incremental Travel	2019 Increment	Tampa In-State Historical Average
Orlando	-	2.0%
Miami	3.8%	2.2%
Ft. Myers	4.8%	3.2%
<b>Total Increment</b>	<b>2.3%</b>	<b>2.2%</b>

Incremental Visitation	2019 Increment	Tampa In-State Historical Average
Orlando	-	9.3k
Miami	24.9k	12.1k
Ft. Myers	8.5k	4.8k
<b>Inc. Visitation</b>	<b>33.3k</b>	<b>26.5k</b>

# Visit Tampa Bay's In-State Marketing Campaign delivered positive results, generating Incremental Visitation and Revenue this year.



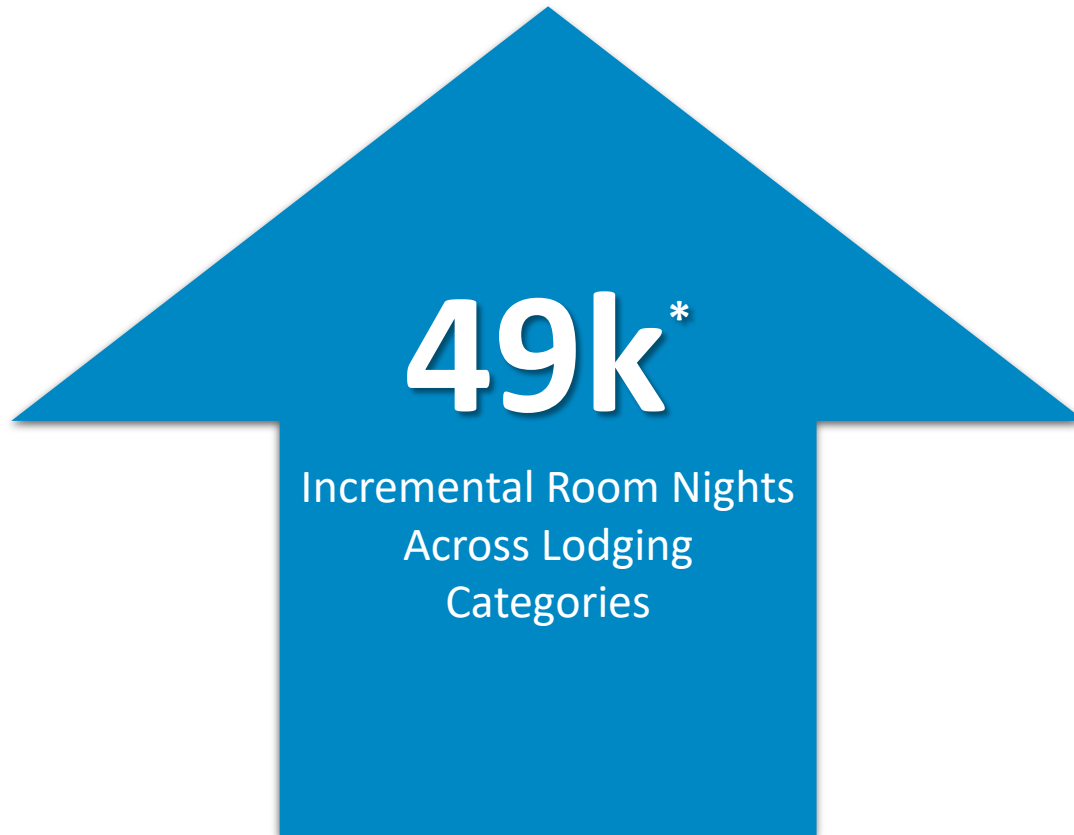
# Incremental Spending

Incremental Spending reached more than \$28M this year, driven by Miami and Ft. Myers' Incremental Visitation.

Tampa Bay's visitors spent \$850 per party this past summer—some of the highest party spending we've seen for In-State Visitors. Spending in the area from both Miami and Ft. Myers visitors increased compared to last year and are both above their respective Historical Averages.

Incremental Spending	2018 Incremental Spending	2019 Incremental Spending	Tampa In-State Historical Average
Orlando	\$4.6M	-	\$5.0M
Miami	\$19.9M	\$23.3M	\$9.8M
Ft. Myers	\$3.5M	\$5.1M	\$2.5M
<b>Total Inc Spending</b>	<b>\$31.7M</b>	<b>\$28.3M</b>	<b>\$18.4M</b>

# Incremental Room Nights



The In-State Marketing Campaign generated more than 49k 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 13% of the total room nights utilized by travelers in Hillsborough County during this timeframe.

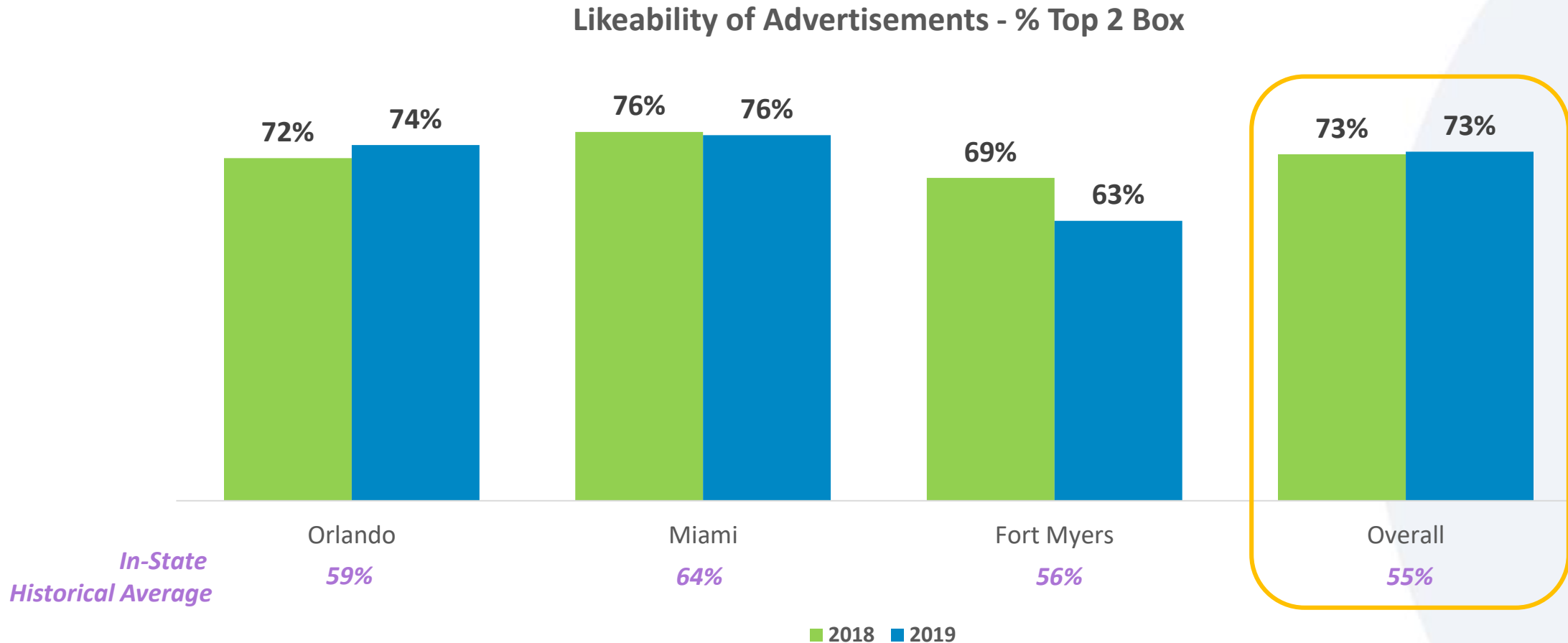
*\*The In-Marketing Campaign generated more than 105k incremental room nights for the entire Greater Tampa Bay area. Of those, 49k were overnight stays in Hillsborough County.*

A large sea turtle is the central focus, swimming towards the left. Its shell is brown and patterned, and its flippers are extended. The background is a clear blue tank with many other fish of various species swimming around. A dark, rocky structure is visible in the bottom right corner. A semi-transparent blue diagonal overlay covers the left side of the image, where the text is placed.

Visit Tampa Bay In-State Marketing & Media Effectiveness

# Advertising Evaluation

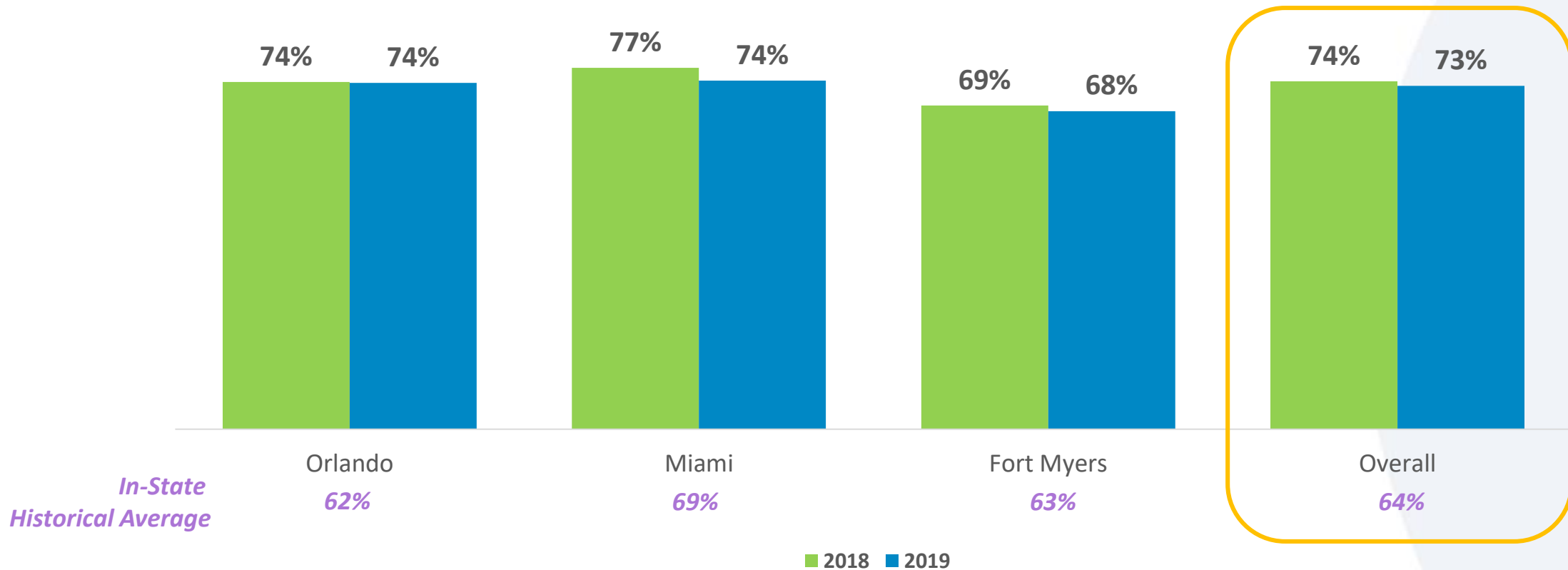
Overall, the ads performed well, and Likeability was rated significantly higher than the In-State Historical Average in all markets.



Q40: Using the scale provided, please rate how much you like this collection of advertisements for Tampa Bay.

# Tampa Bay's ads also had a positive impact on the Appeal of Tampa Bay with nearly three-quarters indicating the ads make the area seem more appealing.

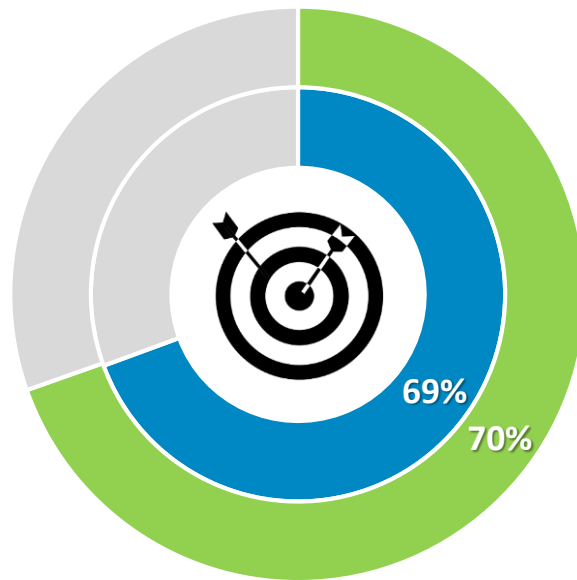
% Top 2 Box – Makes Tampa Bay Seem A Little/Much More Appealing



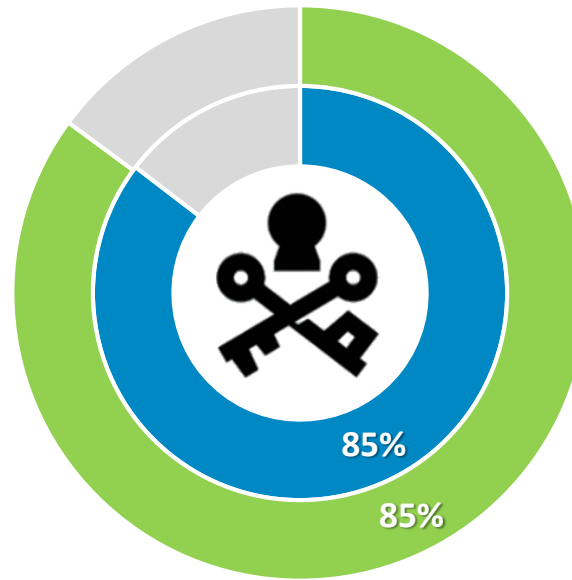
Q41: Using the scale provided, please indicate the degree to which these ads make Tampa Bay seem more appealing to you.



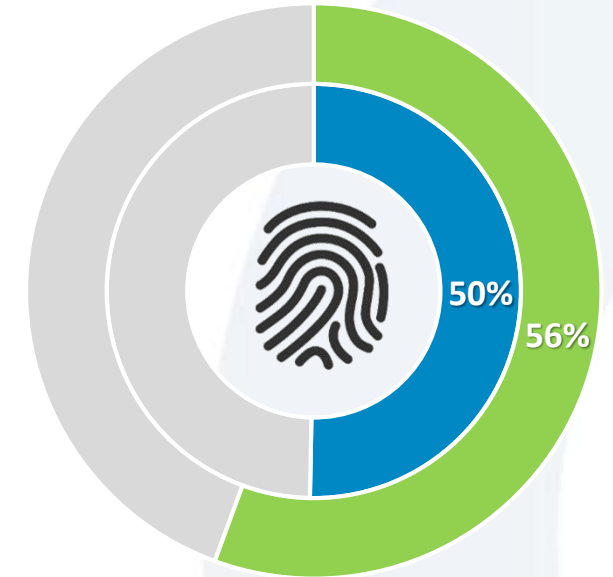
# The Relevance, Brand Fit and Differentiation of Visit Tampa Bay's ads continue to score well and top the Historical Average in each category.



*Somewhat/  
Very Relevant*



*Fits Brand  
Somewhat/Very Well*



*Pretty/  
Much Different*

■ 2018 ■ 2019

Orlando	69%   71%	86%   85%	56%   49%
Miami	73%   71%	87%   86%	60%   54%
Ft. Myers	63%   62%	82%   85%	50%   45%
In-State Hist. Avg.	60%	76%	47%

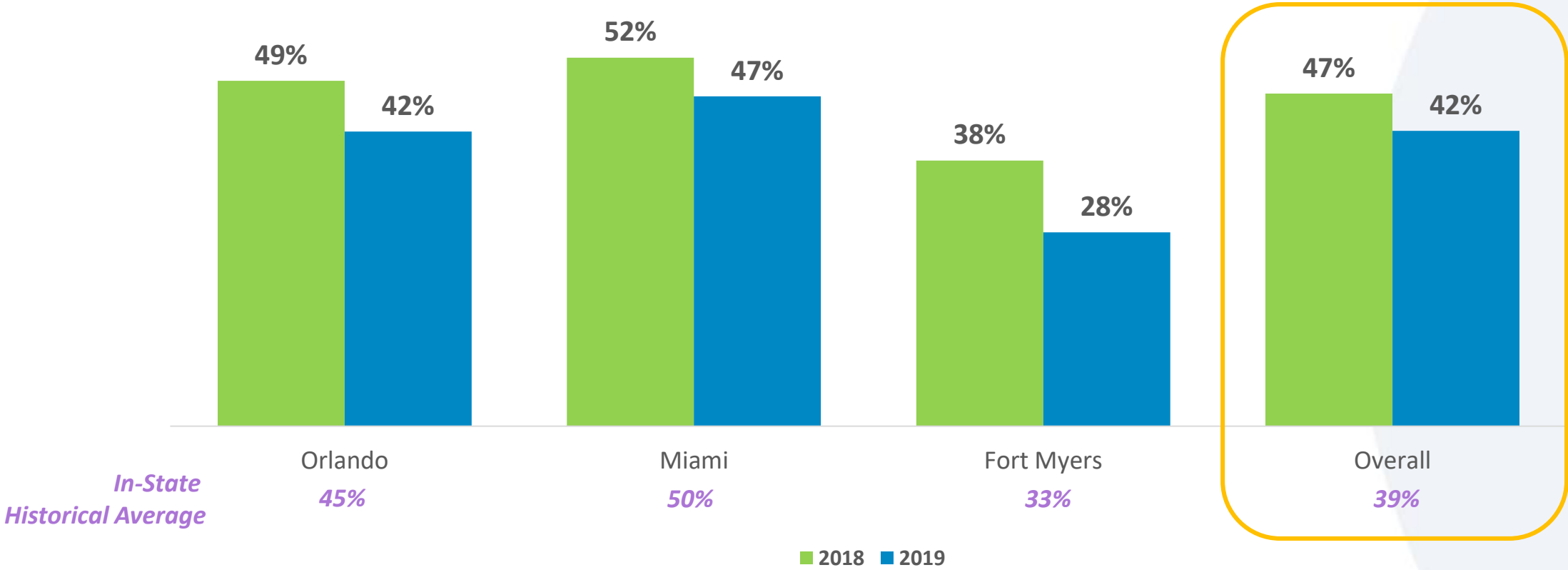
Q42: Using the scale provided, please rate how relevant the points made in these advertisements are to you.

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.

# More than 4 in 10 Travelers would recognize these ads were for Tampa Bay even if the logos were removed. However, like Differentiation, this score declined across each market this year.

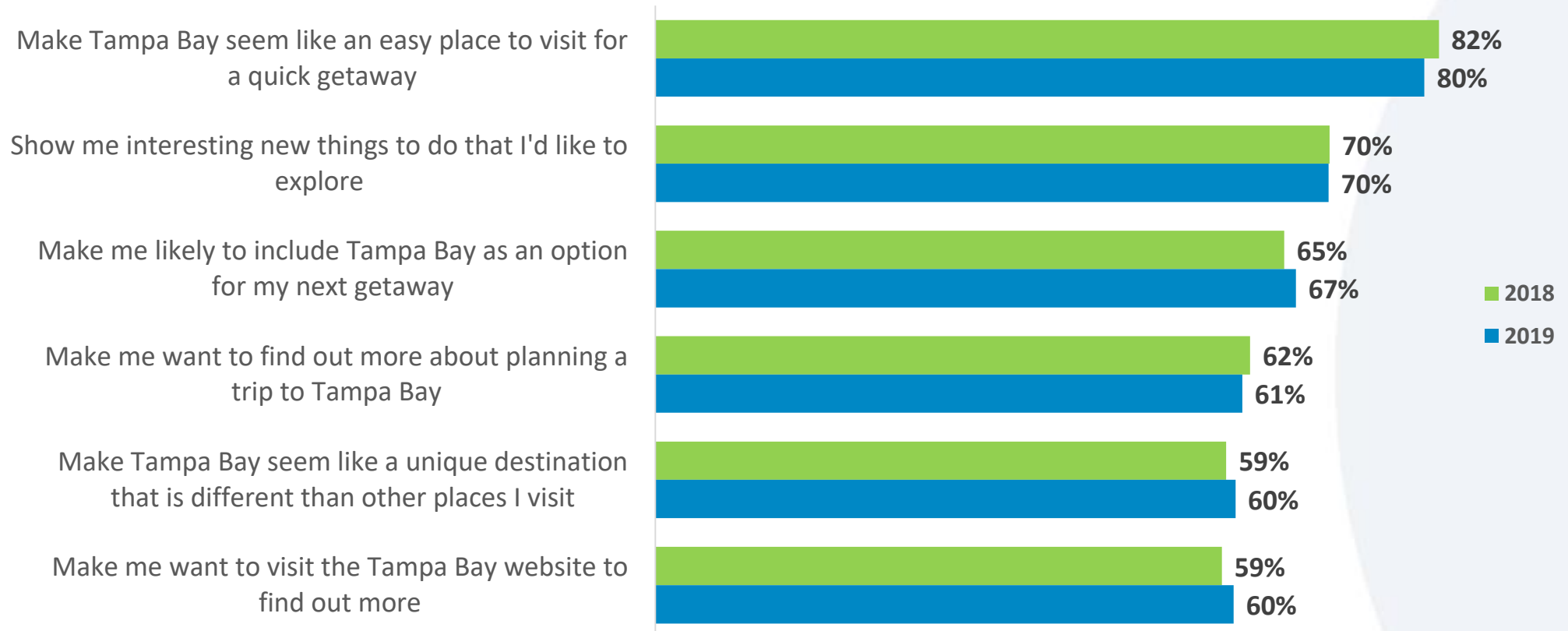
% Top 2 Box – Pretty/Very Easy to Know It's Tampa Without Logos



Q45: If the Visit Tampa Bay logo was removed from this advertisement, how easily could you tell it was for Tampa Bay?

# Traveler message takeaways resonated strongly in this year's In-State Campaign.

## % Somewhat/Strongly Agree



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.

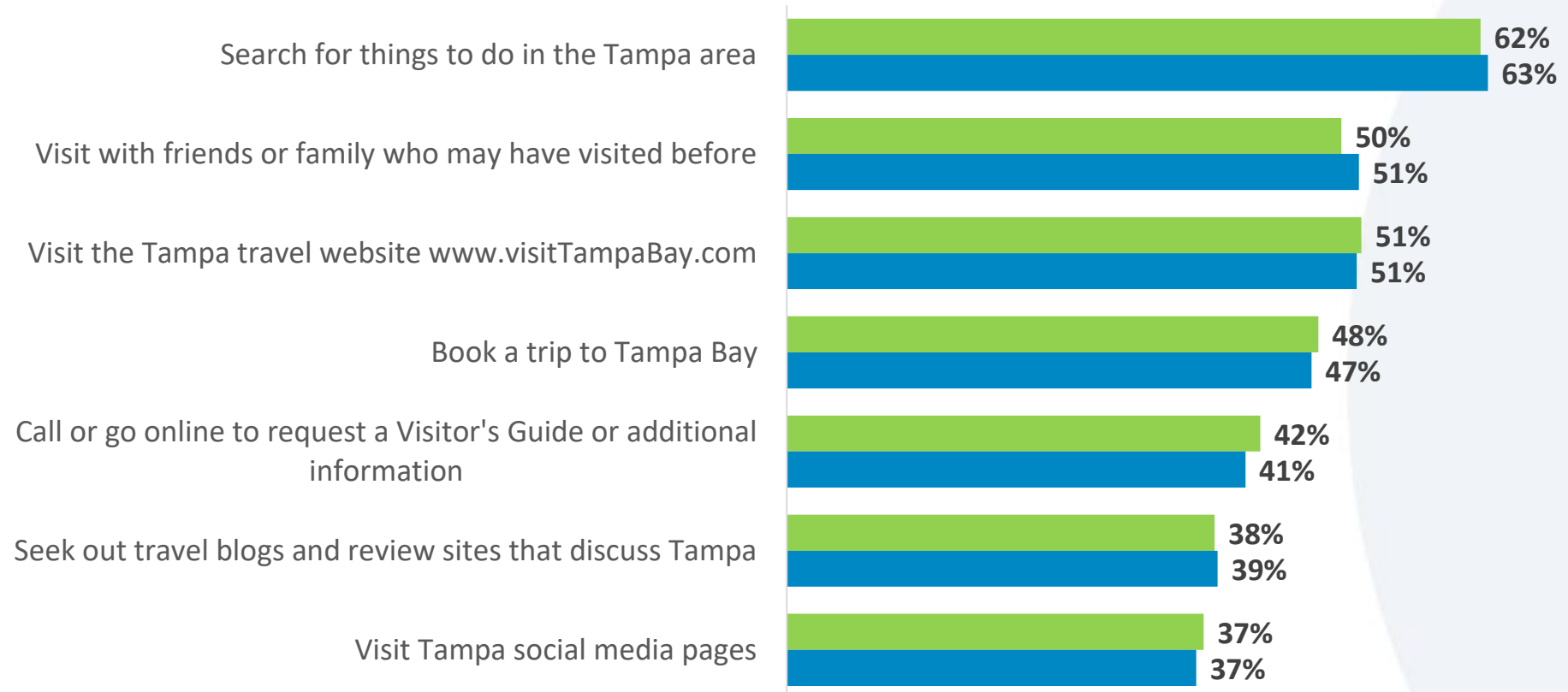
## Orlando and Miami consistently rate the Tampa Bay ads highest across many of the advertising message takeaways.

	Overall	Orlando	Miami	Ft. Myers
Make Tampa Bay seem like an easy place to visit for a quick getaway	80%	82%	79%	78%
Show me interesting new things to do that I'd like to explore	70%	71%	70%	69%
Make me likely to include Tampa Bay as an option for my next getaway	67%	68%	68%	60%
Make me want to find out more about planning a trip to Tampa Bay	61%	61%	63%	56%
Make Tampa Bay seem like a unique destination that is different than other places I visit	60%	61%	62%	55%
Make me want to visit the Tampa Bay website to find out more	60%	62%	61%	53%

Q47: 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 search for things to do in the area as well as visit with friends and family to get more information.

## % Probably/Definitely Would

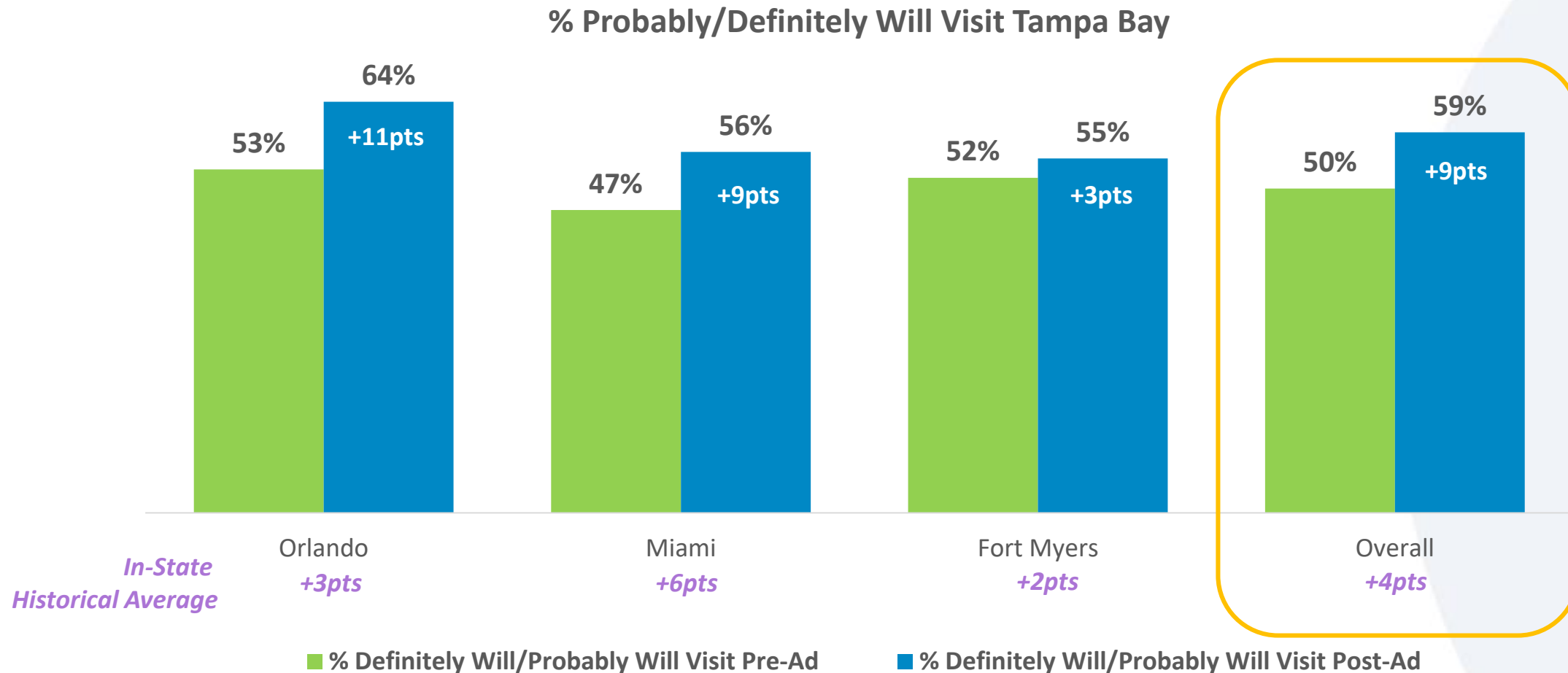


Q48: After reviewing these ads, how likely would you be to take each of the following actions?

## Additionally, Travelers from Orlando and Miami are most likely to take action after seeing the advertisements.

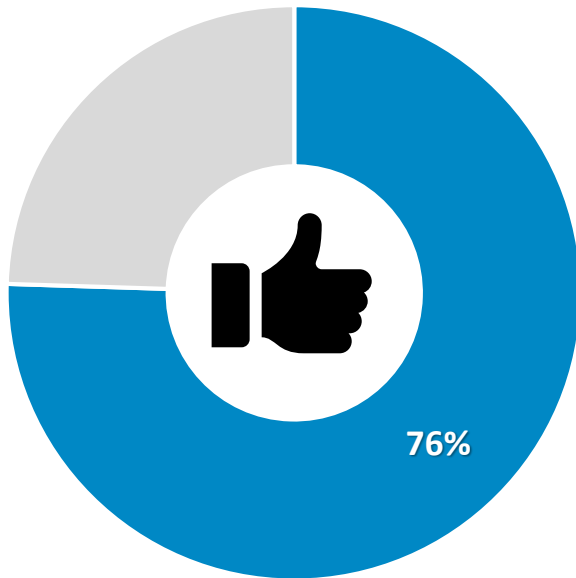
	Overall	Orlando	Miami	Ft. Myers
Search for things to do in the Tampa area	63%	64%	62%	61%
Visit with friends or family who may have visited before	51%	53%	52%	42%
Visit the Tampa travel website <a href="http://www.visitTampaBay.com">www.visitTampaBay.com</a>	51%	49%	56%	42%
Book a trip to Tampa Bay	47%	49%	49%	38%
Call or go online to request a Visitor's Guide or additional information	41%	45%	41%	31%
Seek out travel blogs and review sites that discuss Tampa	39%	38%	43%	27%
Visit Tampa social media pages (i.e., Facebook, Twitter, Instagram, etc.)	37%	36%	41%	23%

# Post-Exposure Intent generated positive Lift in all four advertised markets and averaged +9 points overall—significantly higher than the In-State Historical Average Lift of +4 points.

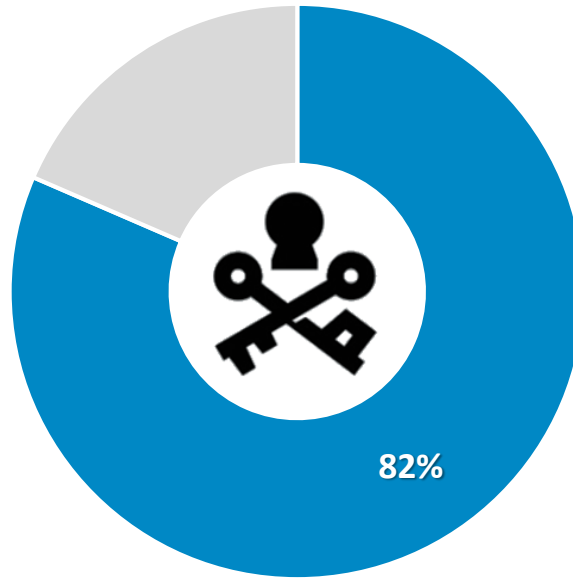


Q15: Using the scale provided, please indicate how likely you are to visit each of the following destinations in the next 12 months.  
Q48: Using the scale provided, please indicate how likely you are to visit the Tampa area in the next 12 months?

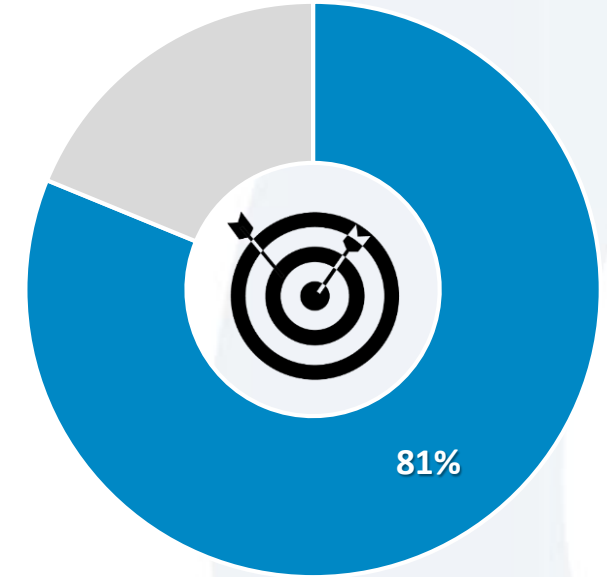
# Bilingual residents of Orlando liked the Spanish-language ads significantly more than Miami residents, but both found the ads significantly more relevant to their interests than the English ads.



*Like/Like a Great Deal*



*Makes Tampa Bay More/  
Much More Appealing*



*Somewhat/  
Very Relevant*

Orlando	78%	89%	89%
Miami	74%	76%	80%

Q50: Using the scale provided, please rate how much you like this collection of advertisements for Tampa Bay.

Q51: Using the scale provided, please indicate the degree to which these ads make Tampa Bay seem more appealing to you.

Q52: Using the scale provided, please rate how relevant the points made in these advertisements are to you.

RESPONDENT BASE: RESPONDENTS WHO ARE BILINGUAL | N=129



Visit Tampa Bay In-State Marketing & Media Effectiveness

# Travel Landscape



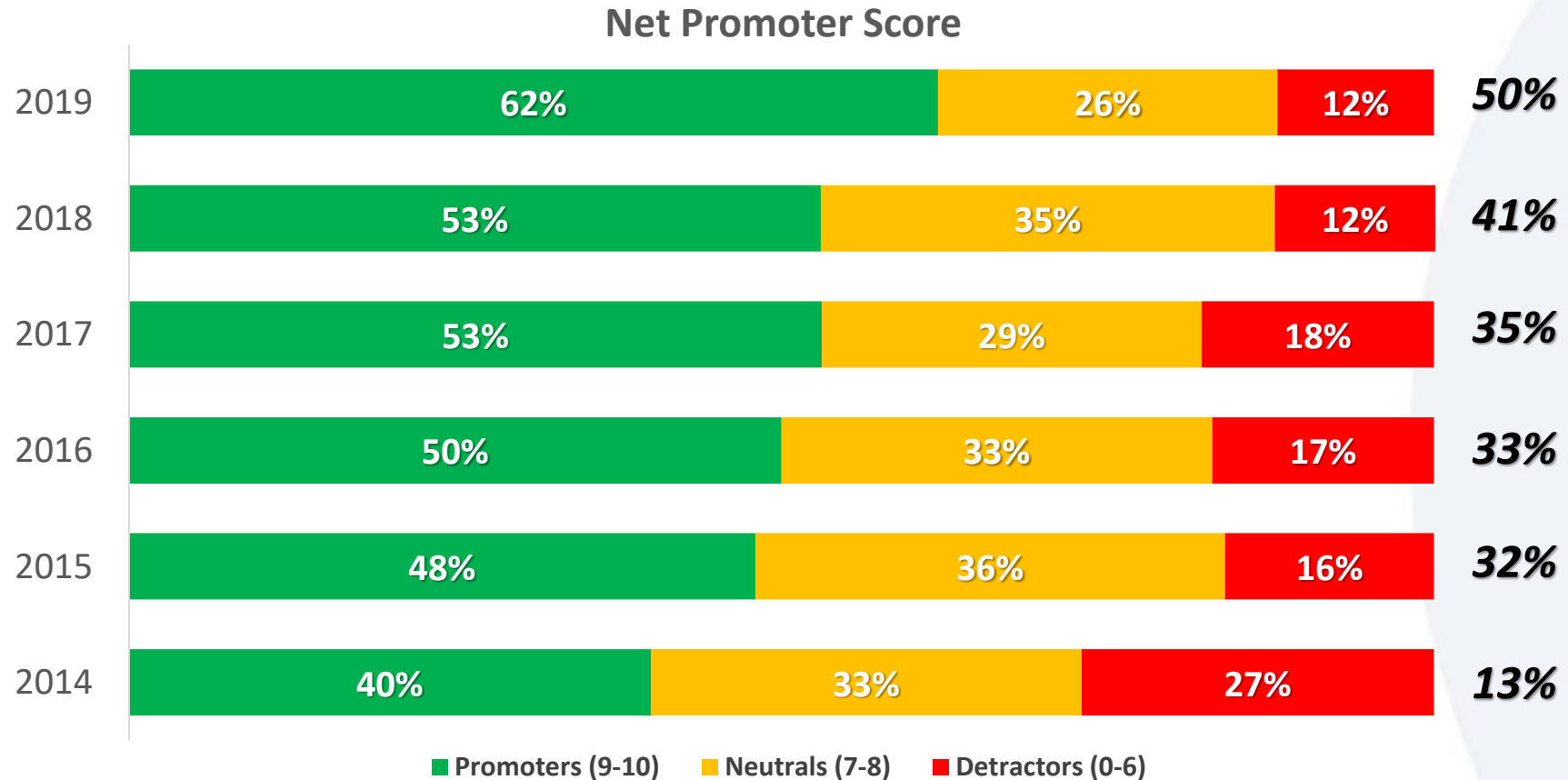
Tampa remains in the top 10 destinations that In-State Travelers first think of as places they enjoy visiting, moving from 9<sup>th</sup> to 6<sup>th</sup> this year.



Rank	Destination	Awareness
1	Disney	7.7%
2	Orlando	6.7%
3	Key West	4.3%
4	Miami	3.5%
5	New York	3.4%
6	Tampa	3.2%
7	Florida	3.0%
8	Europe	2.6%
9	Hawaii	2.4%
10	St. Augustine	2.2%
11	Las Vegas	2.2%
12	Universal	2.0%
13	California	1.6%
14	New Orleans	1.3%
15	Tennessee	1.2%
16	Sanibel	1.2%
17	Beach	1.2%
18	Busch Gardens	1.2%
19	Caribbean	1.0%
20	Daytona	1.0%

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?

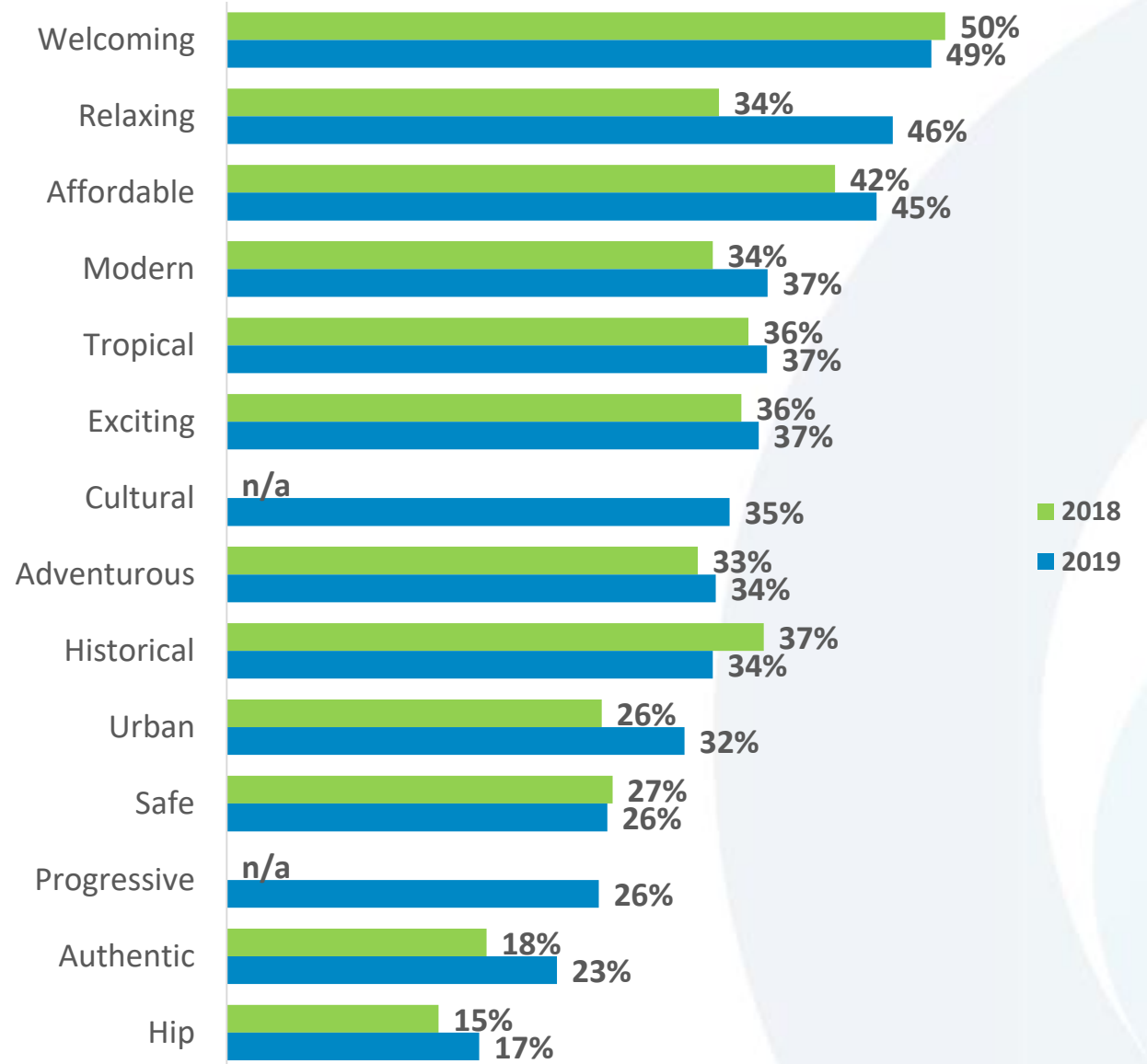
# The Net Promoter Score for Tampa Bay increased by another 9 points this year, driven by a 9-point increase in the number of Promoters.



# Tampa Bay Characteristics

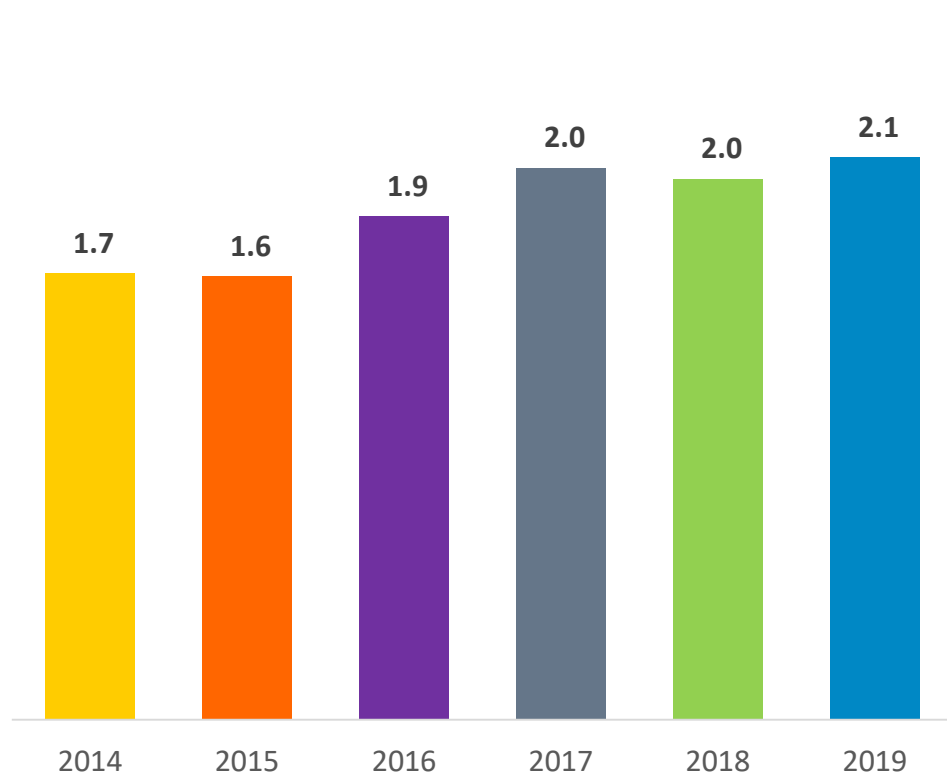
The top characteristic used to describe Tampa Bay continues to be *Welcoming* – *Relaxing* increased significantly this year to top *Affordable*.

Many other characteristics of Tampa Bay also increased this year including *Affordable*, *Modern*, *Tropical*, *Exciting*, *Adventurous*, *Urban*, *Authentic* and *Hip*.

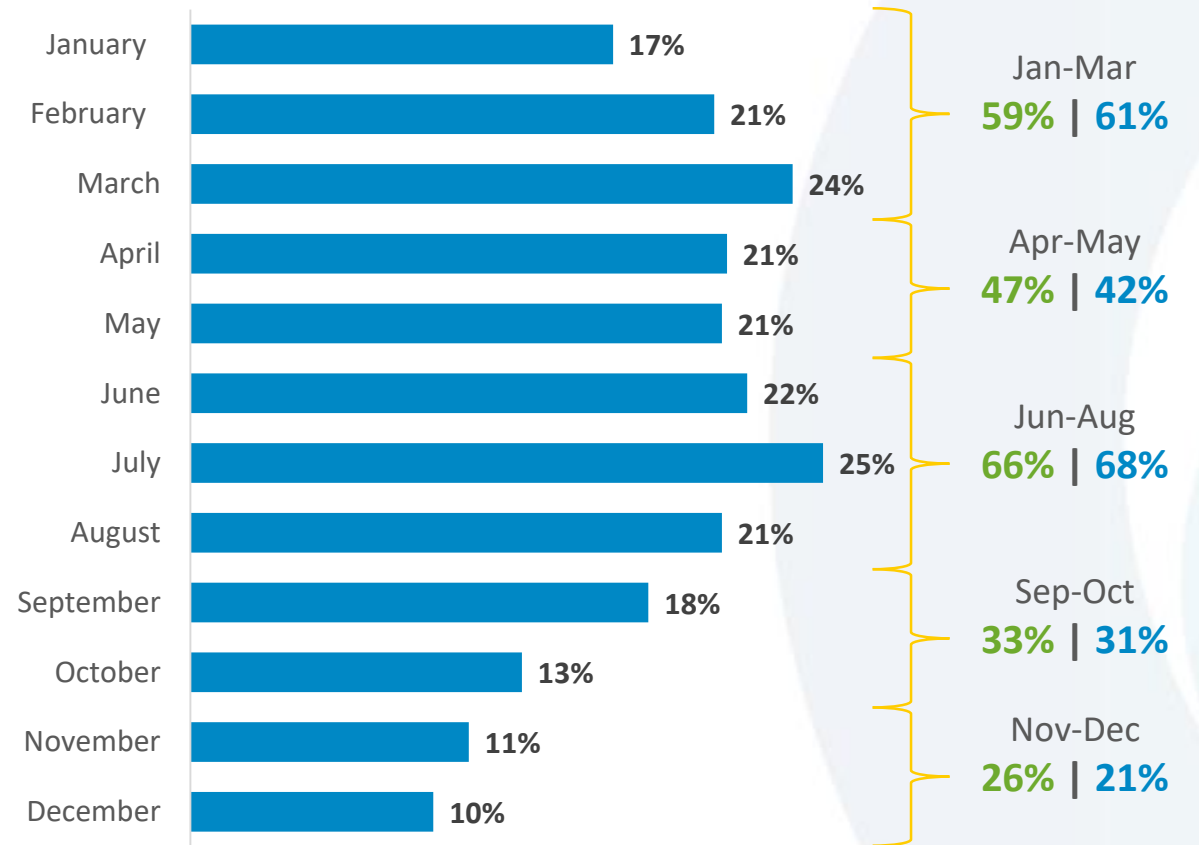


# The number of trips made to the Tampa Bay area among In-State Travelers continues to increase each year. The January-March and June-August time frames also continue to increase in popularity.

Number of Trips in the Past 12 Months



Months Visited Tampa Bay in the Past 3 Years

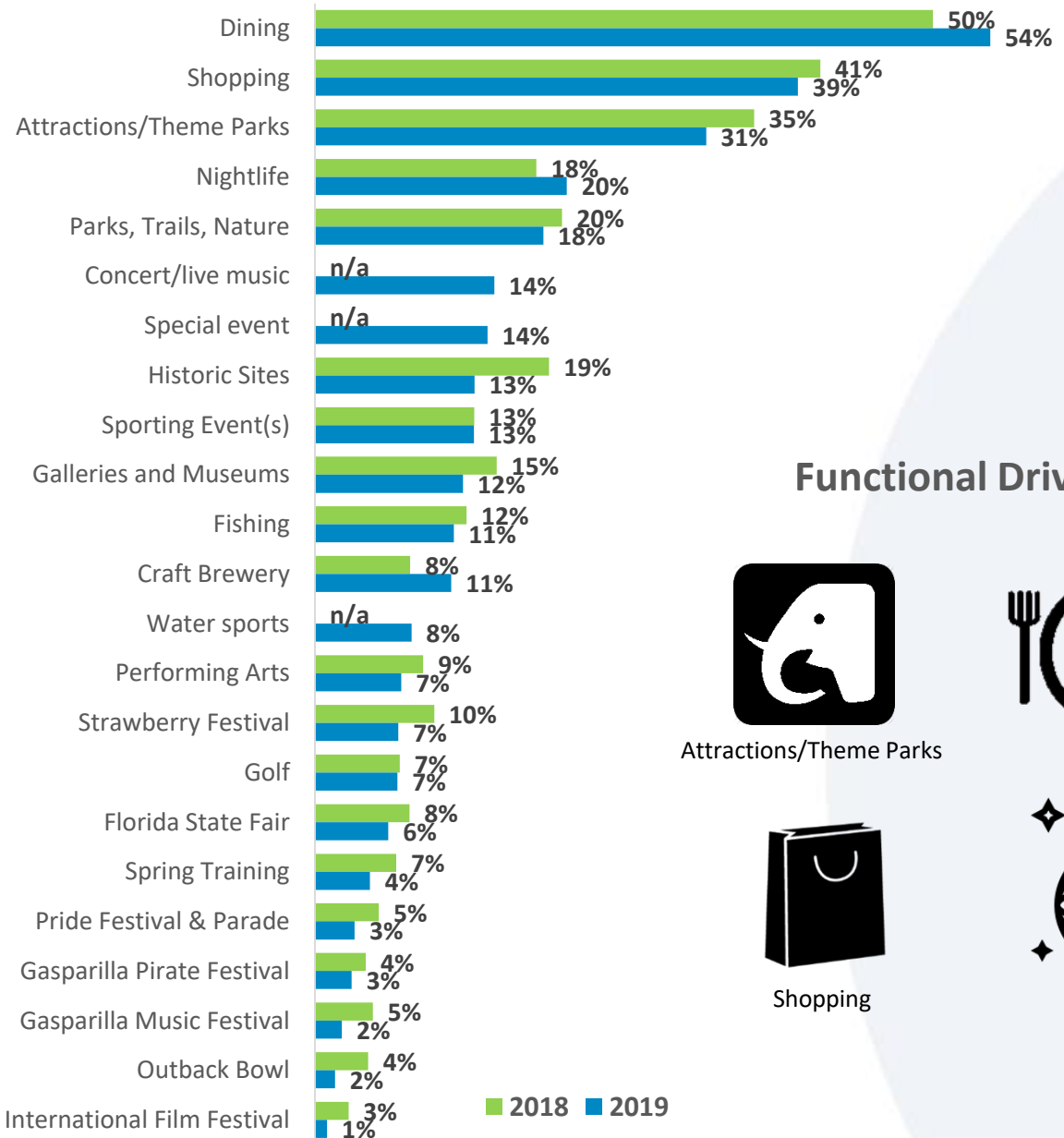


Q18: In the past 3 years, which months have you visited Tampa?  
 Q19: How many trips do you make to the Tampa area in the past 12 months?

# 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, Nightlife broke into the top 4 Drivers this year. Parks/Trails/Nature dropped from 4<sup>th</sup> to 7<sup>th</sup> while Concerts/live music rounded out the top 5.



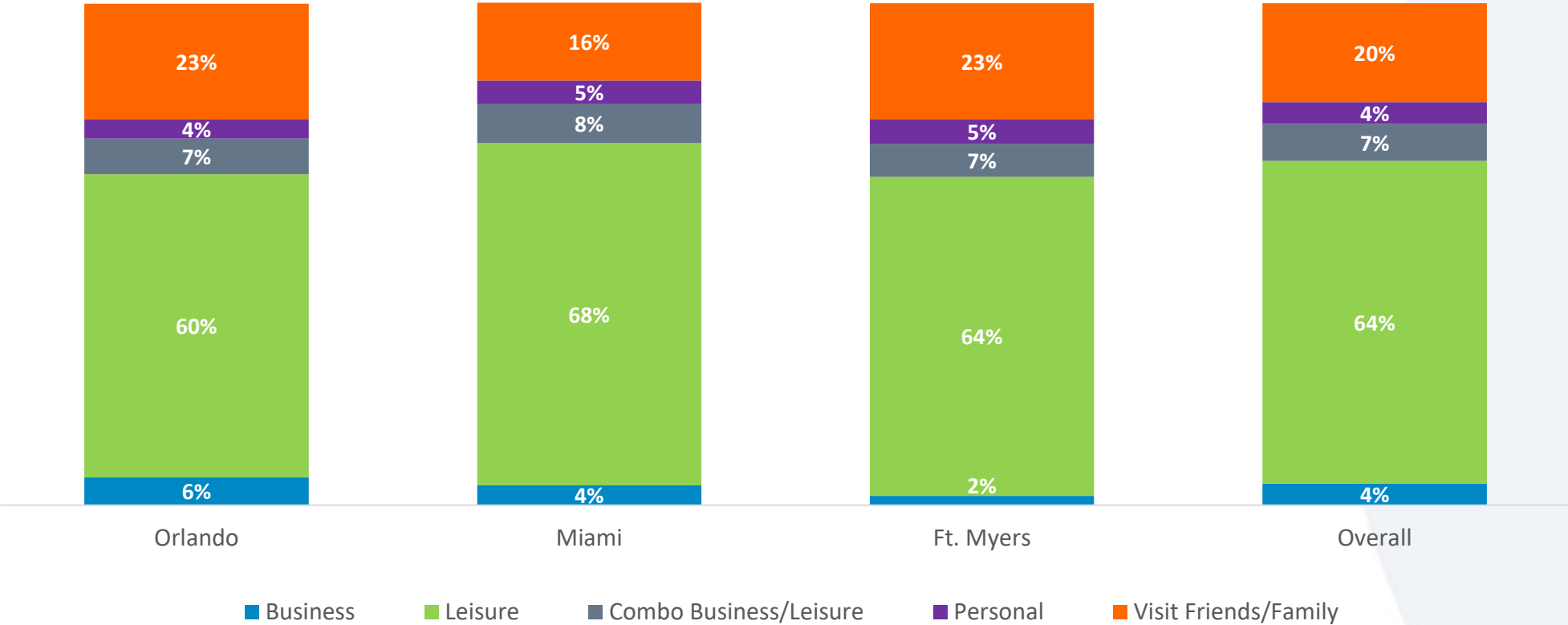
## Functional Drivers



Q21: Which of the following activities or experiences, if any, did you participate in on your most recent visit to the Tampa area? Q22: 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.

# The majority of Tampa Bay visitors from each market visited the area on a leisure getaway—with those visiting from Orlando or Ft. Myers most likely making the trip to see friends/family in the area.

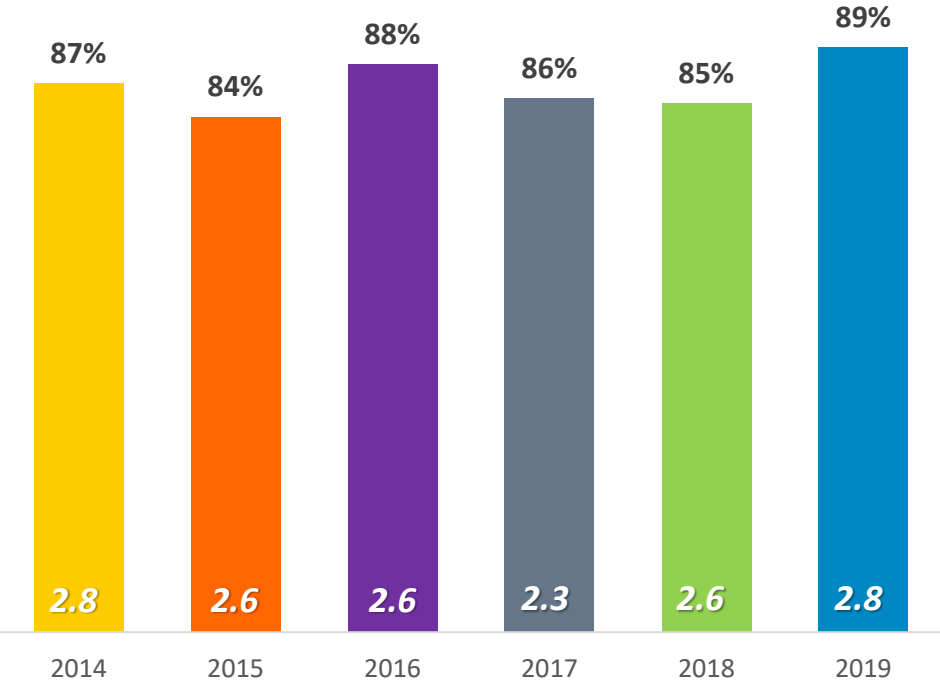
Primary Purpose of Visit to Tampa Bay



Q20: Which of the following was your primary purpose for this visit?

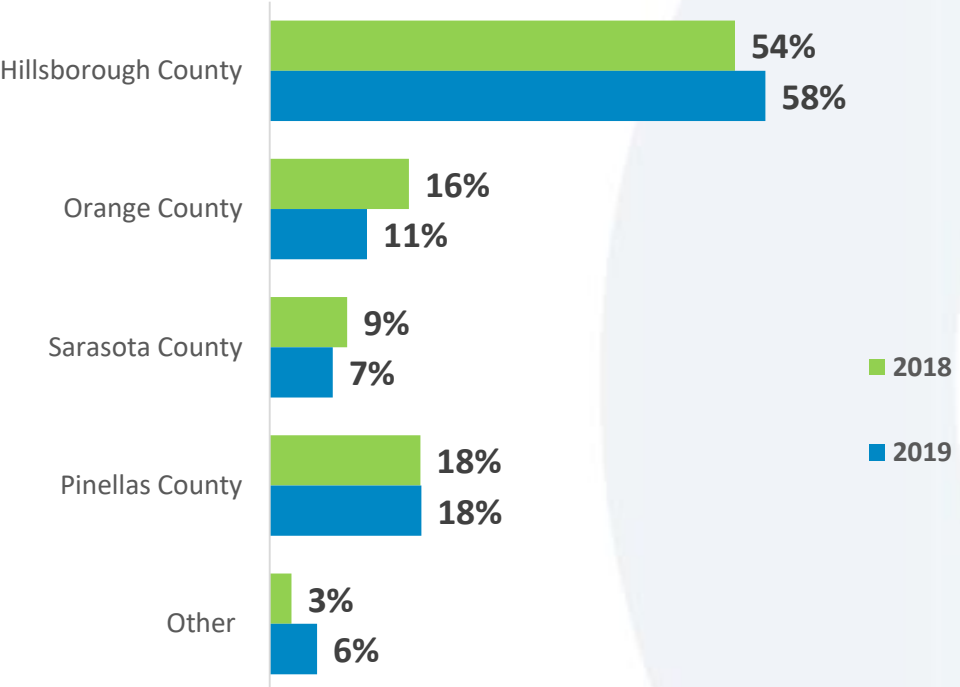
# Overnight Visitation has hovered between 84%-89% for several years and the most popular area to stay in continues to be Hillsborough County — increasing by 4 points this year.

**Overnight Visitation**  
*Number of Nights*



RESPONDENT BASE: VISITED TAMPA IN THE PAST 3 YEARS | N=539

**City/Area Stayed In**

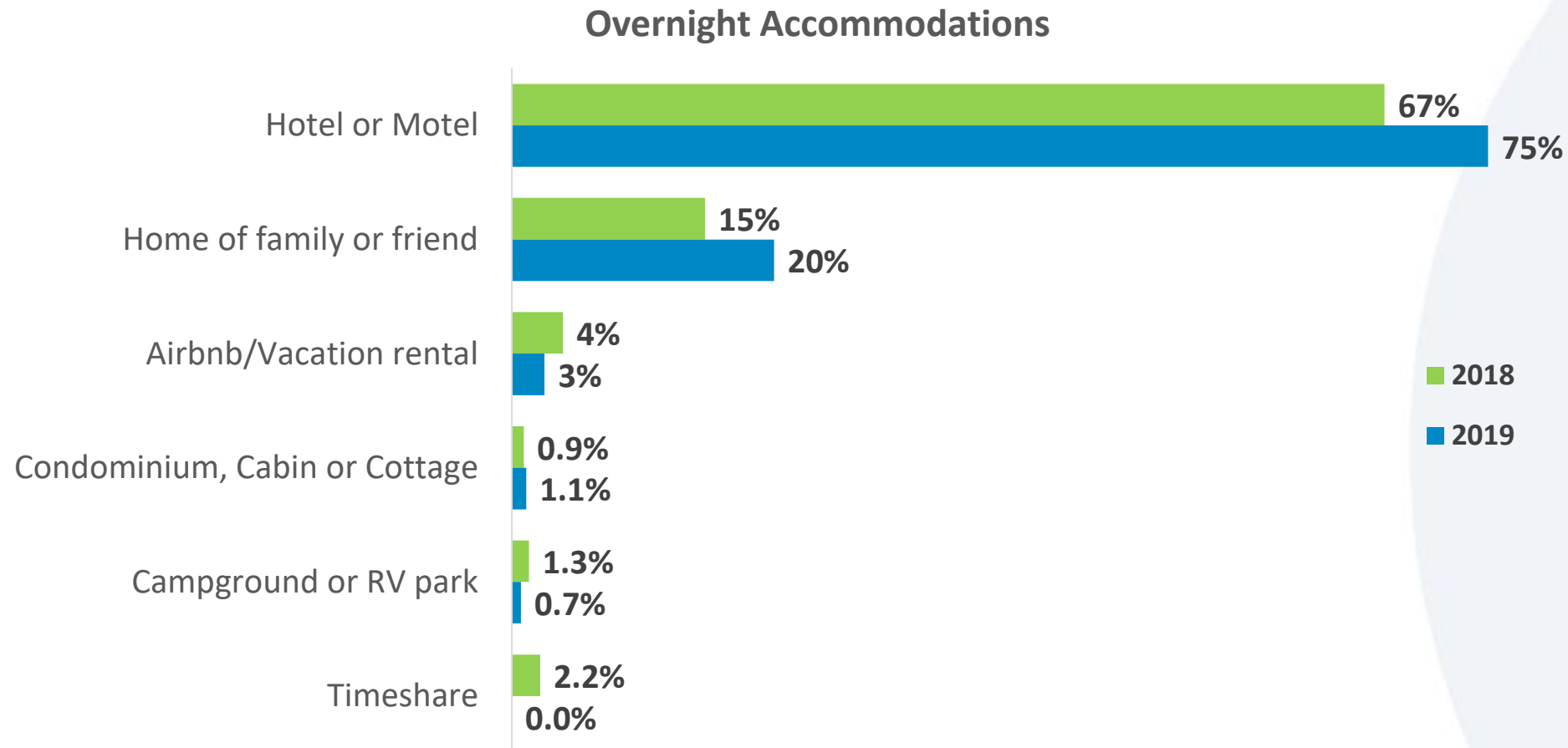


RESPONDENT BASE: ALL OVERNIGHT VISITORS | N=464

Q24: How many nights did you spend in the area on this trip?  
Q25: 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, with Hotel/Motel increasing significantly this year.



Q26: Which of the following best describes the type of accommodations you used on your most recent trip?

**Brand Advocates—those most likely to return and recommend the area—are more likely to have children, earn a higher income, and live closer than those who have not visited the area. Interestingly, the impact of the ads on these two groups is nearly equal.**

	Tampa Bay Recent Visitors	Tampa Bay Non-Visitors	Prospects*	Brand Advocates**
Respondent Age	48	51	48	49
Children in the Home	35%	31%	41%	38%
No Children	65%	69%	60%	62%
Males	44%	39%	43%	45%
Females	56%	61%	57%	55%
HH Income	\$82.8K	\$76.1K	\$80.9K	\$80.9K
Caucasian/White	68%	69%	66%	67%
African American/Black	9%	9%	8%	8%
Hispanic/Latin American	16%	17%	19%	20%
Asian/Pacific Islander	3%	2%	3%	2%
Other Ethnicity	7%	6%	7%	8%
% College Graduate +	59%	59%	59%	58%
Distance from Tampa Bay	117 miles	167 miles	126 miles	121 miles
Advertising Awareness	57%	45%	59%	61%
Post-Ad Intent Lift	2%	12%	26%	12%

\*Prospects are travelers who intend to visit the area after viewing the Digital ads.

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

# Thank You!



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