H2R Market Research

Reveal Your Customer's Full Experience

Visit Tampa Bay

2019 Out of State Marketing & Media Effectiveness Study

Delivered July 2019

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

417.877.7808

@H2RMktResearch

Overview

Executive Summary

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

Target Audience. This research was conducted among travelers living in select feeder markets: Boston, Chicago, Dallas, New York, Philadelphia and Toronto. The research was conducted in June of 2019 to capture the travel and spending that was generated as a direct result of the Out-of-State Campaign (January-April) and to provide an accurate measurement of the marketing ROI.

Sample. A total of 1,400 respondents were interviewed for this study. This sample size provides for a maximum margin of error of +/-2.6% at a 95% confidence interval overall, and +/-4.9% to +/-6.9% per individual market, depending on sample size. Due to large margins of error by market, the results by market should be used for directional purposes only.

Visit Tampa Bay Marketing & Media Effectiveness

Executive Summary

Record Levels of Market Reach

- Visit Tampa Bay's 2019 Out-of-State campaign delivered impressive results this year. Overall awareness in the six target markets (Boston, Chicago, Dallas, New York, Philadelphia, Toronto) was 38% overall. Awareness in Chicago (42%), Dallas (43%) and New York (46%) was significantly* higher than the Historical Average for those markets. High awareness coupled with six advertised markets this year (compared to just 4-5 markets in the past), provided for record market reach (5.3M households).

- The combination of video, digital, OOH and newspaper advertising was a good mix with digital advertising providing the primary reach vehicle for Visit Tampa Bay. Digital advertising alone reached 3.9M households at a cost of just $0.04 each. Video advertising was close behind with 3.5M households at $0.04 each. OOH/Transit ads reached 3.9M households, but were a bit more expensive at $0.18 each. Lastly, the newspaper advertising in Toronto reached 132k households at just $0.08 each.

- The campaign was very efficient overall. The 5.3M total households reached with a total budget of $987k provided for an average cost per aware household of just $0.18. This is on par with the historical average, and just a bit higher than last year ($0.16). New York was the most efficient market at $0.12 while Boston was the most expensive at $0.40.

**Throughout this report, the term significant refers to a statistically significant variance.*

Record Incremental Visits & Spending

- The 2019 campaign also generated record incremental household visitation. The positive incremental conversion of 1.5% delivered a 0.2 point increase over last year and is on par with the Historical Average for the Out-of-State campaign. When extrapolated across the pool of aware travel households, incremental visitation reached 78k incremental household visits—topping last year's record of 59k. Visit Tampa Bay has steadily increased incremental visitation from this particular campaign each year since measurements began in 2014.

- The average visitor party spent $887 during their stay in Tampa Bay. The 78k incremental visits to Tampa Bay produced incremental spending of $69M. This is sales revenue that would not have occurred without the advertising efforts of Visit Tampa Bay.

- This $69M in incremental revenue delivered a 31% increase over last year ($53M) thanks in large part to a 44% increase in the advertising budget (which helped drive a record market reach). This fueled a healthy (but slightly lower) ROI of $70 this year (vs $77 in 2018). However, an apples-to-apples comparison of the Core Markets of Chicago, Dallas, New York and Philadelphia reveals that ROI improved from $77 to $82 in those markets.

Advertising Creates Lift in Intent to Visit

- The Out-of-State marketing campaign continues to appeal to the target market, generating a likeability score of 74%—a significant increase over last year (63%) and the historical average (58%). Likewise, 77% of travelers felt the ads made Tampa seem more appealing as well, also significantly higher than last year (69%) and the historical average (65%).

- Travelers in the advertised markets consider the Out-of-State campaign to be relevant (69%) and differentiated (49%), both scores on par with 2018 figures. Travelers also felt the campaign fits the Tampa Bay brand well (80%), which declined compared to last year but is still on par with the historic average (78%). A new "memorability" metric added this year showed that 40% of travelers could identify Tampa in the ads, even if the logos/names were removed.

- Travelers were most likely to take away the message that Tampa is an easy place to visit for a quick getaway (68%, +4pts) and the ads show travelers interesting new things to do (68%, +5pts). After viewing the ads, travelers said they are most likely to search for things to do in the area (54%, +1pt) and visit the Tampa website (46%, +1pt). More importantly, post ad exposure intent to visit revealed a lift of 10 points—much higher than the Out-of-State Historical Average of 6 points and the H2R Norm of 8 points.

Tampa Bay Out-of-State Campaign
Key Performance Indicators (KPI) Summary

Tampa Bay's 2019 Out-of-State Marketing Campaign generated market reach of 5.3M households and incremental visits of nearly 78k—both records for the Out-of-State campaign.

Two new markets were added to the campaign this year (Boston and Toronto). Typically new markets drag down the average awareness. However, the overall average awareness of 38% was on par with last year (37%) and the larger pool of traveler households helped to increase reach and incremental visits to record-breaking levels. Incremental revenue generated was also at record levels of nearly $69M—a 51% increase over the historical average. However, spending on the campaign increased by 44%, outpacing the growth in incremental revenue. Therefore ROI was healthy at $70, but a bit lower than last year and the historical average ($76).

Key Performance Indicator	2019	Out-of-State Historical Average**
Awareness	38%	31%
Aware Households	5.3M	3.5M
Incremental Visitation	+1.5%	+1.5%
Incremental Trips	+77.7k	+47.7k
Incremental Revenue	+$68.9M	$45.8M
NET Media Investment*	$982k	$598k
Cost/Aware Household	$0.18	$0.18
NET Return on Investment	***$70***	***$82***
GROSS Media Investment*	$987k	$639k
Cost/Aware Household	$0.18	$0.19
GROSS Return on Investment	***$70***	***$76***

**Net Media investment and returns do not include costs associated with distribution, only consumer facing expenditures. Gross investments and returns include all campaign expenditures.*
***The Out of State Historical Average is derived from all Out of State Campaigns conducted since 2014.*

Tampa Bay Out-of-State Campaign – *Core Markets Only*
Key Performance Indicators (KPI) Summary

For the past 3 years, Visit Tampa Bay has advertised in at least the same four Core Markets of Chicago, Dallas, New York and Philadelphia. The chart to the right outlines the trends in these Core Markets over time.

The 2019 campaign generated the highest levels of awareness and incremental travel in these core markets. This fueled a rise in incremental revenue for the Tampa area of 29% over three years. The campaign has remined very efficient in these markets and the overall return on investment has risen from $70 in 2017 to $82 this year (+17%).

Key Performance Indicator	2017 Core Markets*	2018 Core Markets*	2019 Core Markets*
Awareness	41%	37%	43%
Aware Households	4.8M	4.4M	4.6M
Incremental Visitation	1.0%	1.3%	1.5%
Incremental Trips	45.4k	59.0k	67.4k
Incremental Revenue	$46.0M	$52.8M	$59.3M
NET Media Investment	$651k	$685k	$715k
Cost/Aware Household	$0.14	$0.16	$0.16
NET Return on Investment	***$71***	***$77***	***$83***
GROSS Media Investment	$656k	$688k	$720k
Cost/Aware Household	$0.14	$0.16	$0.16
GROSS Return on Investment	***$70***	***$77***	***$82***

**Core markets are Chicago, Dallas, New York and Philadelphia which were all measured in 2017, 2018 and 2019 for an apples-to-apples comparison.*

Visit Tampa Bay Marketing & Media Effectiveness

Marketing Efficiency

Marketing Efficiency

KEY PERFORMANCE INDICATORS

38%
of travelers have seen/heard a Tampa Bay advertisement

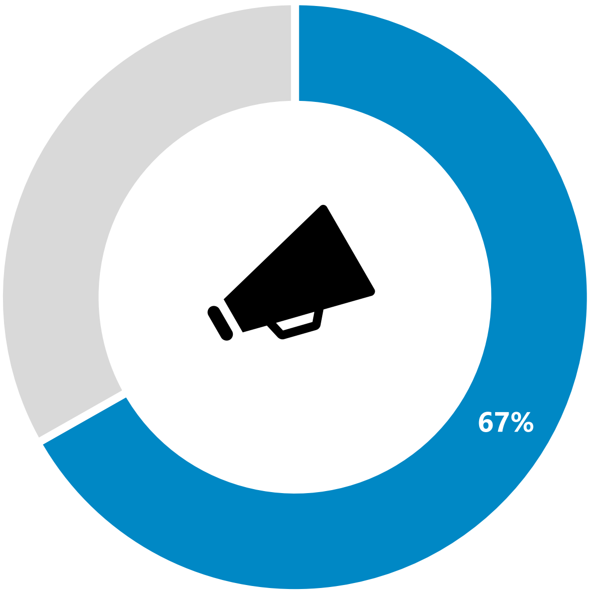
5.3M
households were reached by Tampa Bay's advertising

$987k
was spent on advertising in the target markets

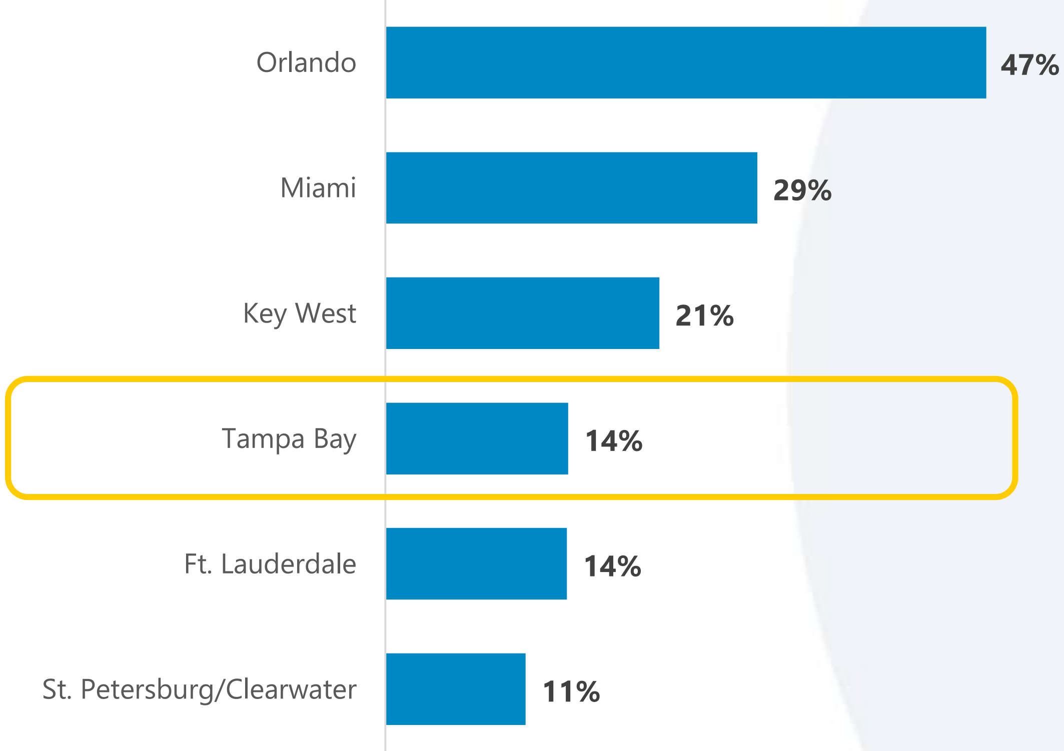
$0.18
was spent to reach each aware household in the target markets

Two-thirds of travelers recall seeing some type of travel advertising in the past 6 months. When given a choice of several destinations, most recalled seeing ads for Orlando or Miami.

General Travel Ad Awareness



Assisted Ad Awareness of Destinations in the Competitive Set

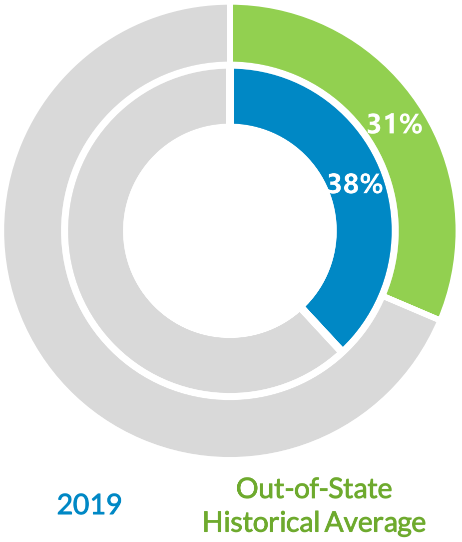


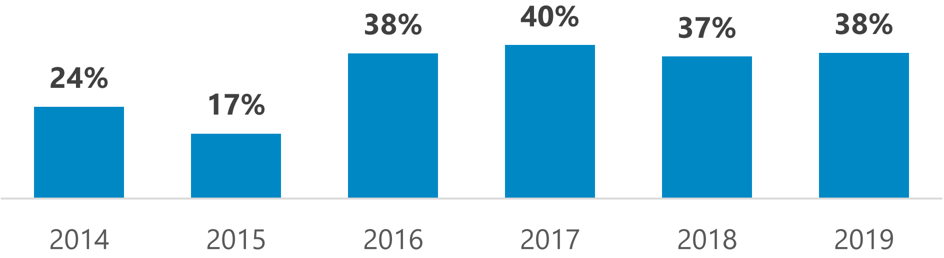
Q9: Have you seen or heard any destination travel advertisements anywhere in the past 6 months?
Q11: Have you seen or heard travel advertisements in the past 6 months for any of the following destinations? Please select all that apply.
*Assisted advertising awareness lists destinations, but no creative images/videos were shown

RESPONDENT BASE: ALL RESPONDENTS | N=1,400

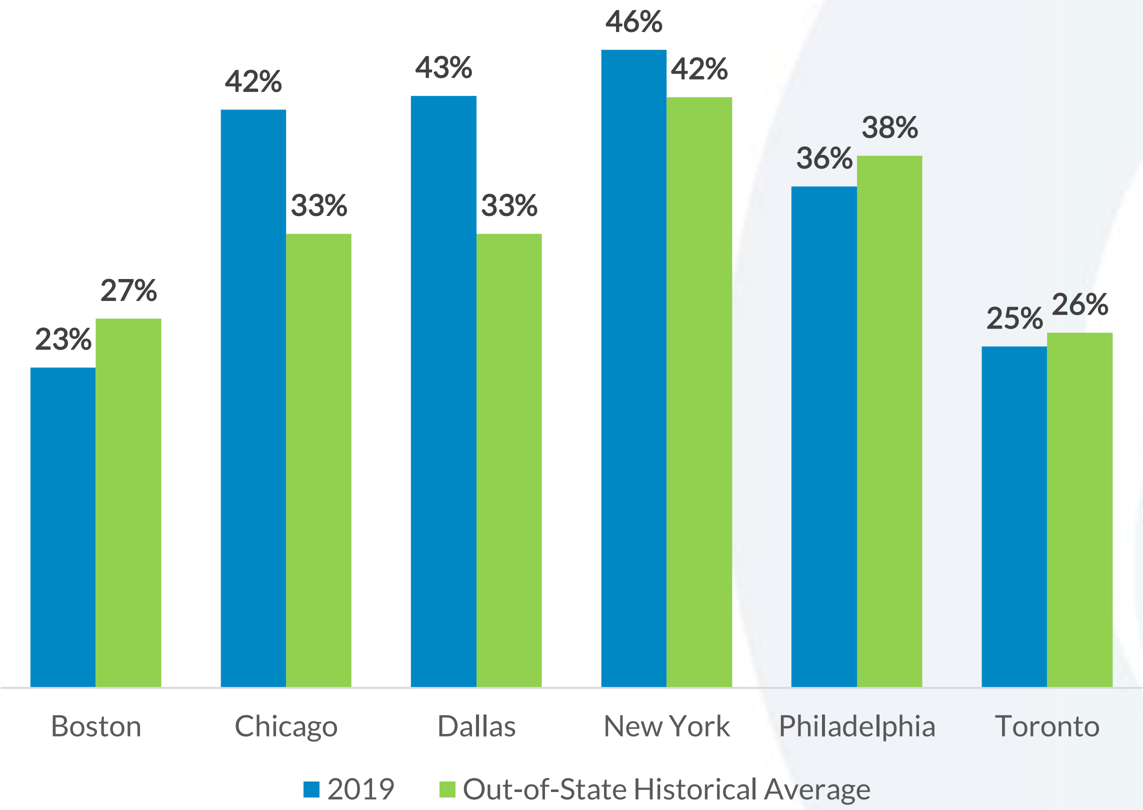
Tampa Bay's ad awareness of 38% this year is on par with the past several years and well above the historical average for Out-of-State campaigns. New York, Dallas and Chicago continue to drive the highest levels of awareness.

Total Aided Awareness





Tampa Bay Aided Advertising Awareness



Q33-36: Have you seen this advertisement?

RESPONDENT BASE: ALL RESPONDENTS | N=1,400

Market Reach (Aware Traveler Households)

Tampa Bay's 2019 Out-of-State Marketing Campaign generated a market reach of 5.3 million traveler households—a record for the Out-of-State campaign and any Tampa campaign.

Chicago, Dallas and Philadelphia drove higher awareness than last year, and New York stayed on par with 2018. This, along with the addition of the Boston and Toronto market reach drove record-breaking awareness of the campaign.

Market Reach	2018 Market Reach	2019 Market Reach	Out-of-State Historical Average
Boston	n/a	473k	520k
Chicago	854k	945k	854k
Dallas	633k	702k	625k
New York	2,307k	2,211k	2,168k
Philadelphia	619k	710k	797k
Toronto	n/a	303k	268k
Total Reach	**4.4M**	**5.3M**	**3.5M**
Core Markets (Gross) Only	*4.4M*	*4.6M*	

Media Expenditures

Visit Tampa Bay invested more than $987k in the Out-of-State campaign this year, a 44% increase over 2018 expenditures.

Not only did Visit Tampa Bay spend more on advertising the Out-of-State campaign this year in all markets, but significantly more of the budget was spent on consumer-facing ads, rather than costs associated with distribution, fueling the record-breaking market reach.

Media Expenditures	2018 Spending	2019 Spending	Out-of-State Historical Average
Boston	n/a	$189,450	$110,743
Chicago	$149,863	$165,037	$148,209
Dallas	$88,352	$118,628	$108,962
New York	$305,703	$262,847	$262,496
Philadelphia	$140,633	$168,757	$152,687
Toronto	n/a	$76,840	$57,593
NET Media Spending	**$684,551**	**$981,559**	**$598,144**
Costs Associated w/ Distribution	$3,074	$5,645	$40,911
GROSS Media Spending	**$687,625**	**$987,204**	**$639,055**
Core Markets (Gross) Only	*$687,625*	*$719,719*	

Media Efficiency

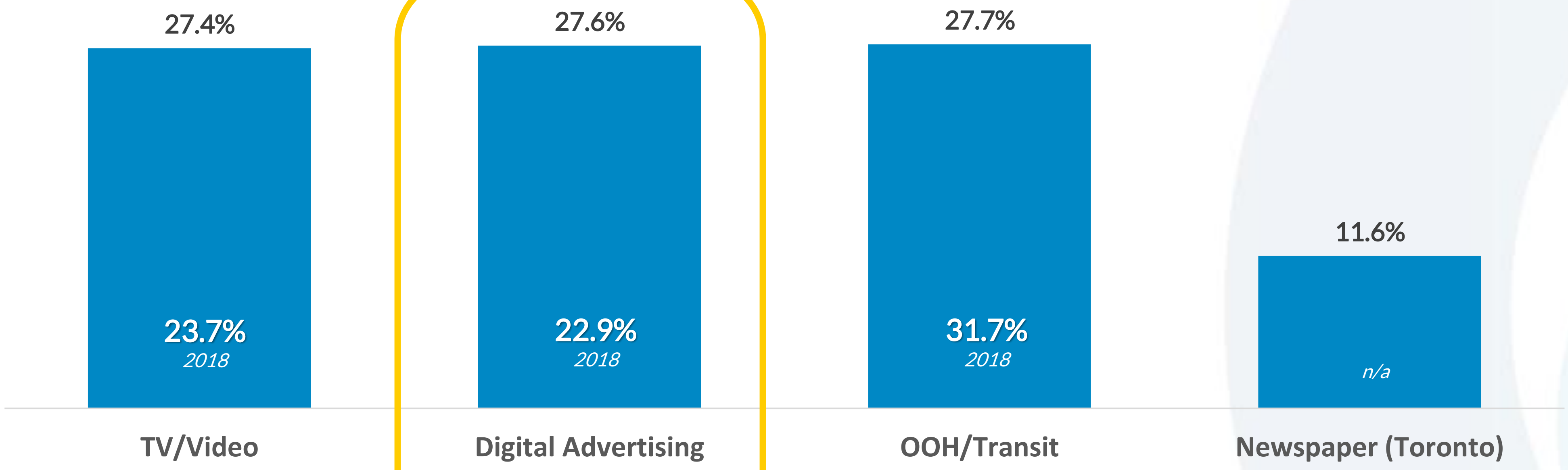
Visit Tampa Bay's cost per aware household was $0.18 this year. A bit higher than last year ($0.16), but still on par with the historical average for Out-of-State campaigns.

Although there was a large increase in investment in the Out-of-State campaign, the increase in market reach kept the efficiency of the campaign high. Nearly every market was on par with their historical average, with the exception of Boston. Tampa had not advertised here since 2016, and therefore the cost of entry was a bit higher than it was in the past.

Media Efficiency	2018 Cost/Aware HH	2019 Cost/Aware HH	Out-of-State Historical Average
Boston	n/a	$0.40	$0.21
Chicago	$0.18	$0.17	$0.18
Dallas	$0.14	$0.17	$0.20
New York	$0.13	$0.12	$0.12
Philadelphia	$0.23	$0.24	$0.20
Toronto	n/a	$0.25	$0.22
NET Cost/Aware HH	**$0.16**	**$0.18**	**$0.18**
GROSS Cost/Aware HH	**$0.16**	**$0.18**	**$0.19**
Core Markets (Gross) Only	*$0.16*	*$0.16*	

Digital advertising and TV/Video drove the campaign this year with the highest levels of reach at the lowest cost. OOH ads had high levels of awareness, but cost more while Newspaper in Toronto cost less, but had low awareness.

Advertising Awareness by Medium

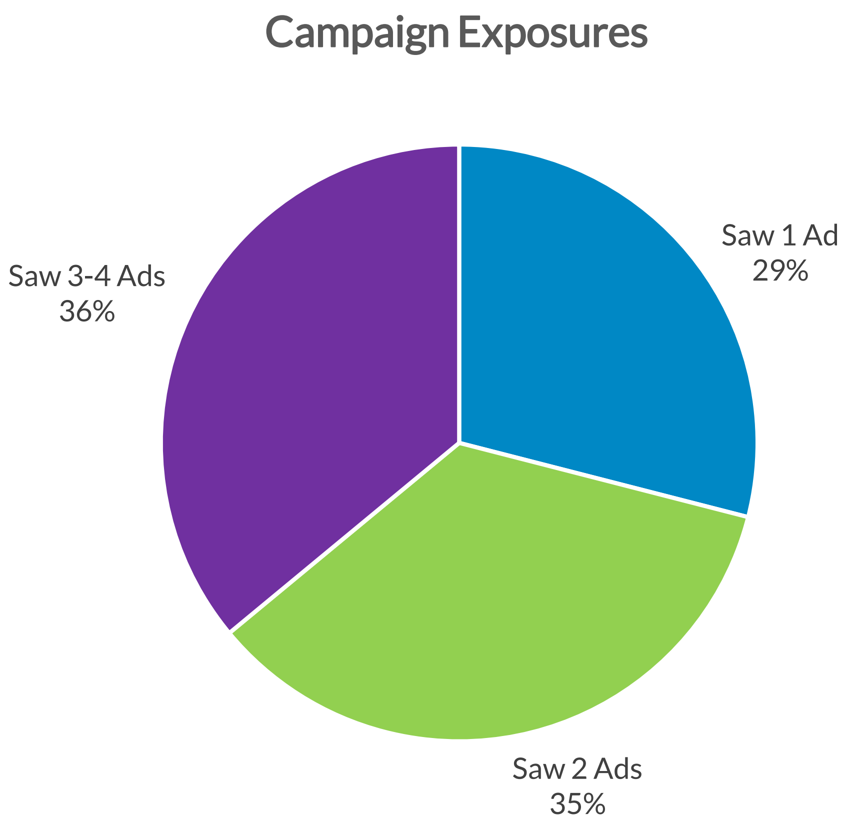


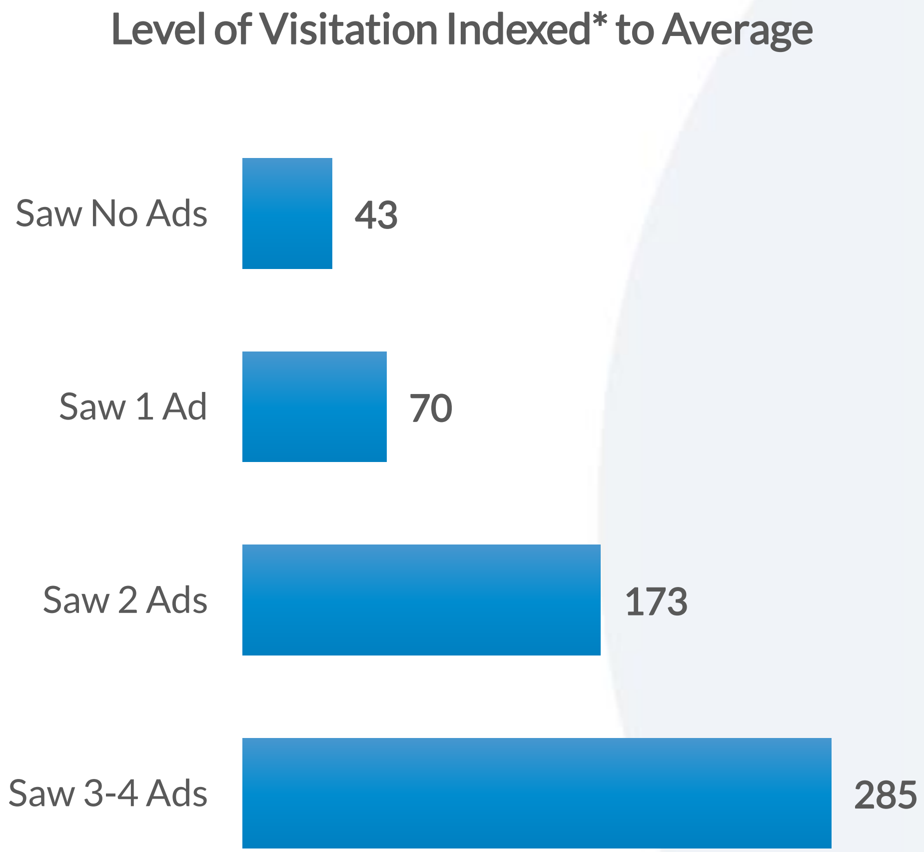
	TV/Video	Digital Advertising	OOH/Transit	Newspaper (Toronto)
Reach (HHs)	3.5M	3.9M	3.9M	132k
Cost/HH	$0.04	$0.04	$0.18	$0.08

Q33-36: Have you seen this advertisement?

RESPONDENT BASE: ALL RESPONDENTS | N=1,400

The more ads/channels travelers were exposed to, the more likely they were to have visited Tampa Bay.





Q28-34: Have you seen this advertisement?
* **An index of 100 indicates the level of visitation is equal to average. An index lower than 100 indicates visitation is lower than average while a higher index indicates higher visitation.*

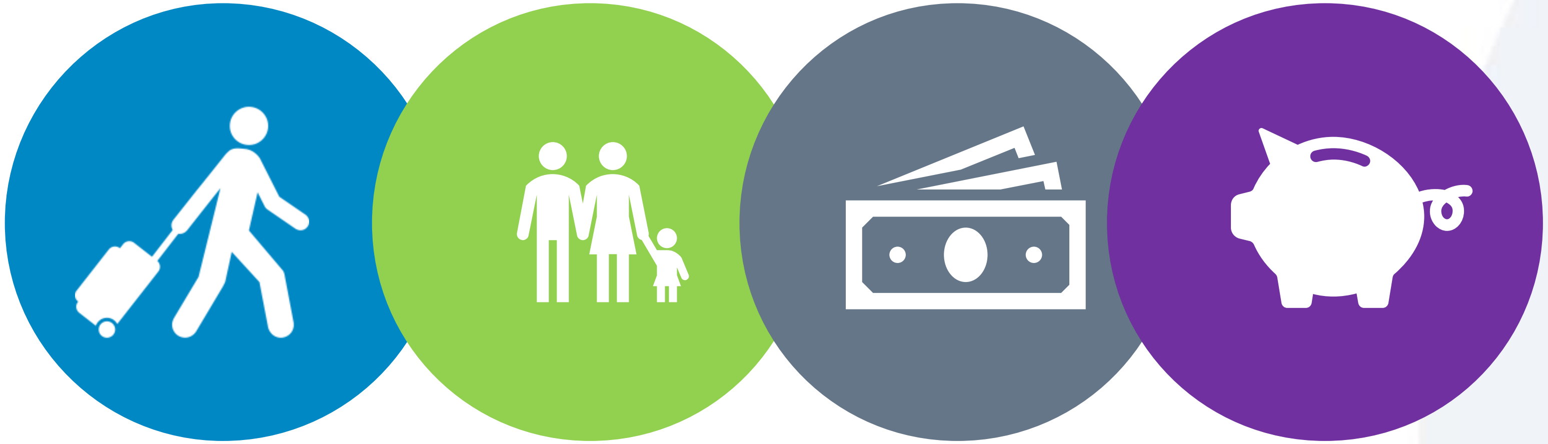
RESPONDENT BASE: ALL RESPONDENTS | N=1,400

Visit Tampa Bay Marketing & Media Effectiveness

Incremental Impact

Incremental Impact

KEY PERFORMANCE INDICATORS



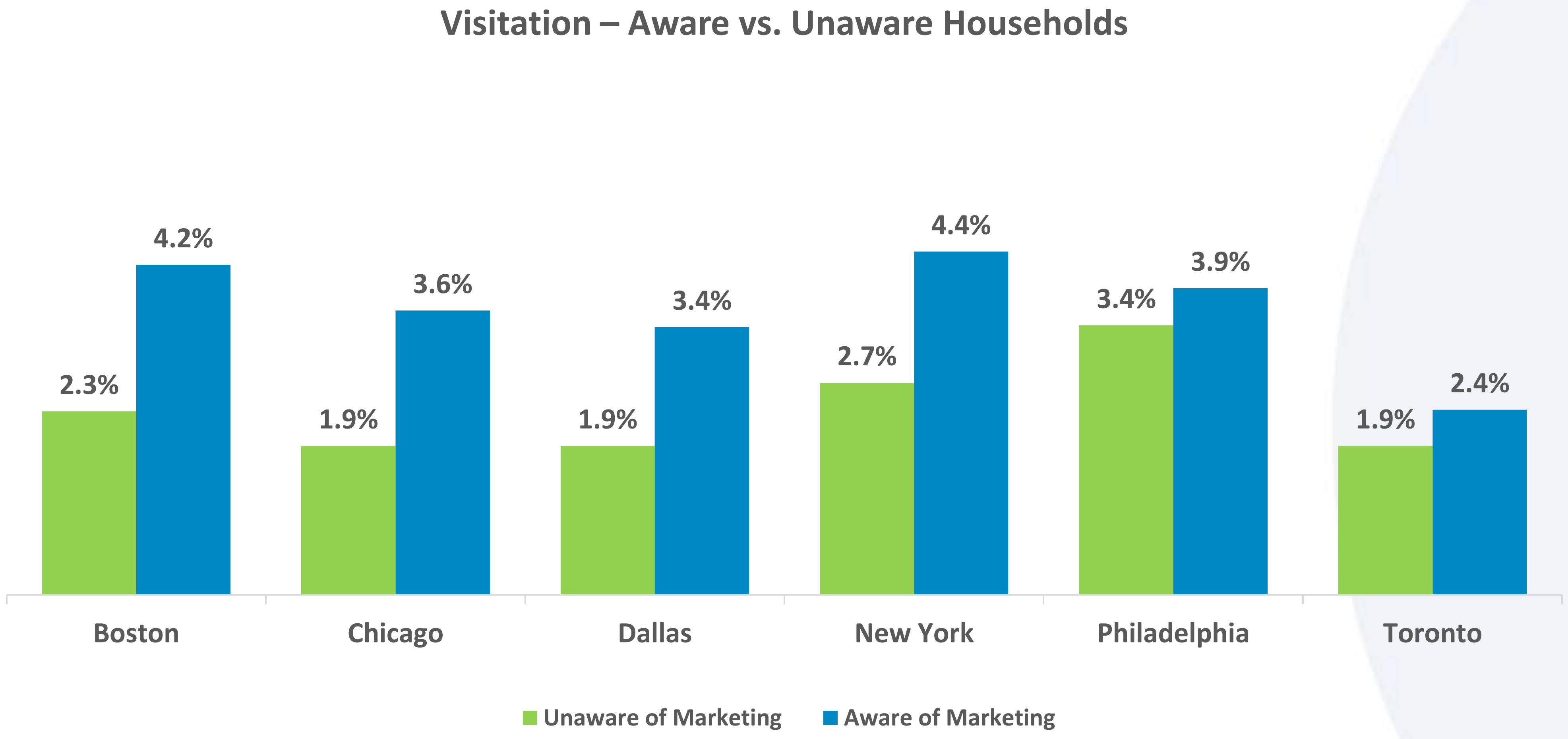
77.7k
incremental trips were generated by the Out-of-State campaign

$887
was spent by each incremental travel party in the area

$68.9M
in incremental revenue was generated by the Out-of-State campaign

$70
was returned to the local economy for each dollar invested in the campaign

Every advertised market generated incremental visitation in the Out-of-Market Campaign.



Q14: Have you visited Tampa (the shaded area on the map above) since January of this year (2019)?

RESPONDENT BASE: TAMPA BAY VISITORS IN PAST 3 YEARS | N=232

Incremental Visitation

Tampa Bay's 2019 Out-of-State campaign delivered a larger amount of incremental visitation to the Tampa area than in the past 2 years and an increment commensurate with its historic average.

New York and Boston both generated incremental visitation that was higher than the historic average for those markets. The remaining markets were somewhat lower than what they've been in the past, but in all, the total campaign was on par with the historic average.

% Increment	2018 Increment	2019 Increment	Out-of-State Historical Average
Boston	n/a	1.9%	1.2%
Chicago	1.6%	1.7%	2.1%
Dallas	1.4%	1.5%	1.9%
New York	1.3%	1.7%	1.2%
Philadelphia	1.1%	0.5%	0.6%
Toronto	n/a	0.5%	0.7%
Total Increment	**1.3%**	**1.5%**	**1.5%**
Core Markets (Gross) Only	*1.3%*	*1.5%*	

Record Incremental Visitation

The larger pool of aware households generated by the campaign allowed the 1.5% increment to go even farther this year—generating record-breaking incremental visitation of nearly 78k household visits.

The New York market once again drove the highest number of incremental visits, followed by Chicago and Dallas. Boston and New York also saw higher than average incremental visits this year.

Incremental Visitation	2018 Incremental Visitation	2019 Incremental Visitation	Out-of-State Historical Average
Boston	n/a	8.9k	5.4k
Chicago	13.7k	16.3k	17.5k
Dallas	9.1k	10.7k	11.2k
New York	29.4k	37.1k	25.9k
Philadelphia	6.7k	3.4k	4.5k
Toronto	n/a	1.4k	1.7k
Total Incremental Visitation	**59.0k**	**77.7k**	**47.7k**
Core Markets (Gross) Only	*59.0k*	*67.4k*	

Record Incremental Visitor Spending

A larger number of incremental visits translated into record breaking incremental visitor spending for the area. This year incremental visits generated more than $68M in spending that would not have occurred without the advertising.

The increase in incremental spending was driven in large part by the New York DMA, which enjoyed a $10.1M increase over its historic average return.

Incremental Visitation	2018 Incremental Spending	2019 Incremental Spending	Out-of-State Historical Average
Boston	n/a	$7.7M	$5.2M
Chicago	$12.3M	$12.5M	$17.4M
Dallas	$9.3M	$12.1M	$12.1M
New York	$24.0M	$31.7M	$21.6M
Philadelphia	$7.2M	$2.9M	$4.6M
Toronto	n/a	$1.9M	$2.6M
Total Incremental Visitation	**$52.8M**	**$68.9M**	**$45.8M**
Core Markets (Gross) Only	*$52.8M*	*$59.3M*	

Return on Investment

Visit Tampa Bay spent 44% more on this year's campaign than last year, which outpaced the growth in incremental revenue (+31%). Therefore ROI was healthy at $70, but a bit lower than last year ($77) and the historical average ($76).

However, it should be noted that in the Core Markets of Chicago, Dallas, New York and Philadelphia, the ROI actually increased from $77 to $82 this year. The ROI from New York was significantly higher than the historic average (+51%), while other markets were somewhat lower than we've seen in the past.

Return on Investment	2018 ROI	2019 ROI	Out-of-State Historical Average
Boston	n/a	$41	$69
Chicago	$82	$76	$121
Dallas	$105	$102	$120
New York	$79	$121	$80
Philadelphia	$51	$17	$31
Toronto	n/a	$24	$55
Total NET ROI	**$77**	**$70**	**$82**
Total GROSS ROI	**$77**	**$70**	**$76**
Core Markets (Gross) Only	*$77*	*$82*	

Visit Tampa Bay's Out-of-State marketing campaign delivered positive results, generating incremental visitation and spending this year.

77.7k Incremental Trips
67.4k Core Markets
59.0k in 2018

$887 Spent/Party
$880 Core Markets
$894 in 2018

$68.9M Incremental Revenue
$59.3M Core Markets
$52.8M in 2018

$982k Net Investment
$715k Core Markets
$685k in 2018

$70 ROI
$83 Core Markets
$77 in 2018

$987k Gross Investment
$720 Core Markets
$688k in 2018

$70 ROI
$82 Core Markets
$77 in 2018

Incremental Room Nights

141k*

Incremental Room Nights Across Lodging Categories

The Out-of-State Marketing Campaign generated nearly 141k incremental room nights (that would not have occurred otherwise) from those staying overnight in Hillsborough County at a Hotel/Motel, Condo, Cabin or Cottage.

Extrapolated across the number of rooms purchased and length of stay, it is estimated that the Out-of-State Marketing Campaign generated approximately 16% of the total room nights utilized by travelers in Hillsborough County during this timeframe.

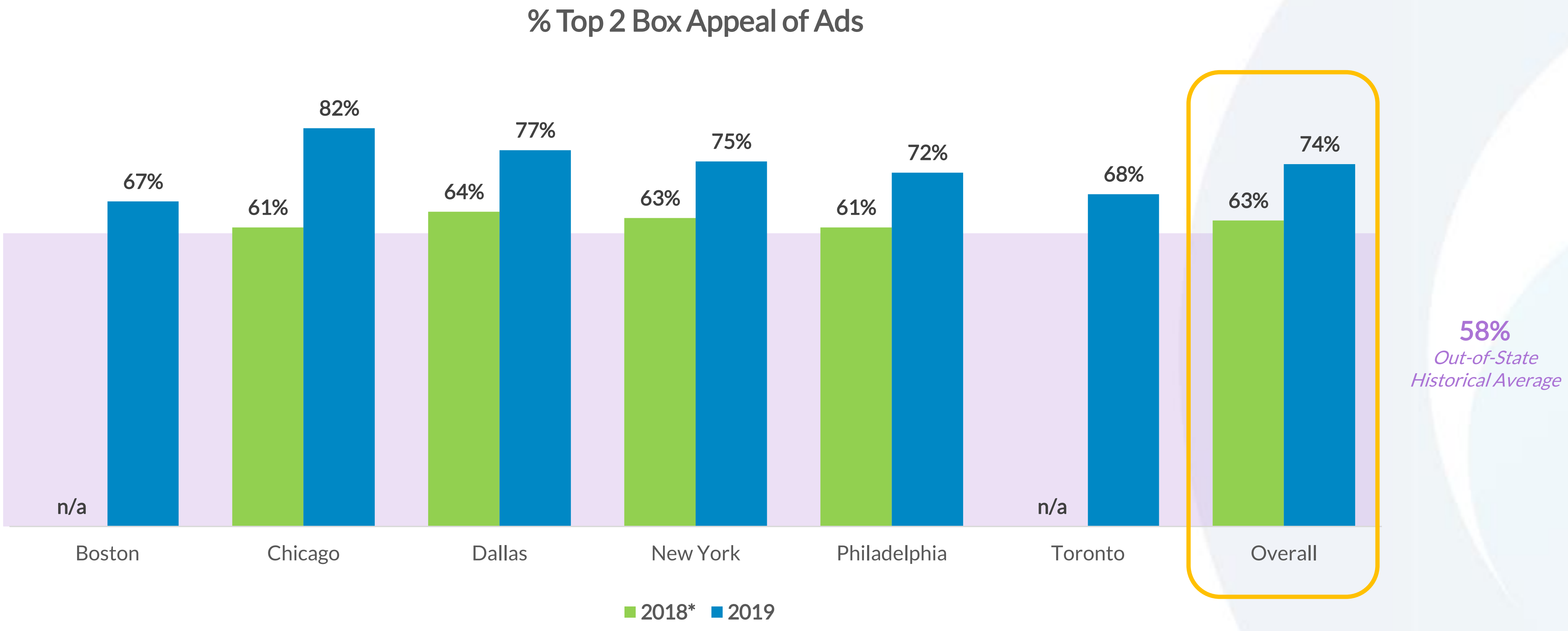
**The Out-of-State Marketing Campaign generated more than 489k incremental room nights for the entire Greater Tampa Bay area. Of those, 141k were overnight stays in Hillsborough County.*

RESPONDENT BASE: OVERNIGHT VISITORS WHO STAYED IN HILLSBOROUGH COUNTY | N=74

Visit Tampa Bay Marketing & Media Effectiveness

Advertising Evaluation

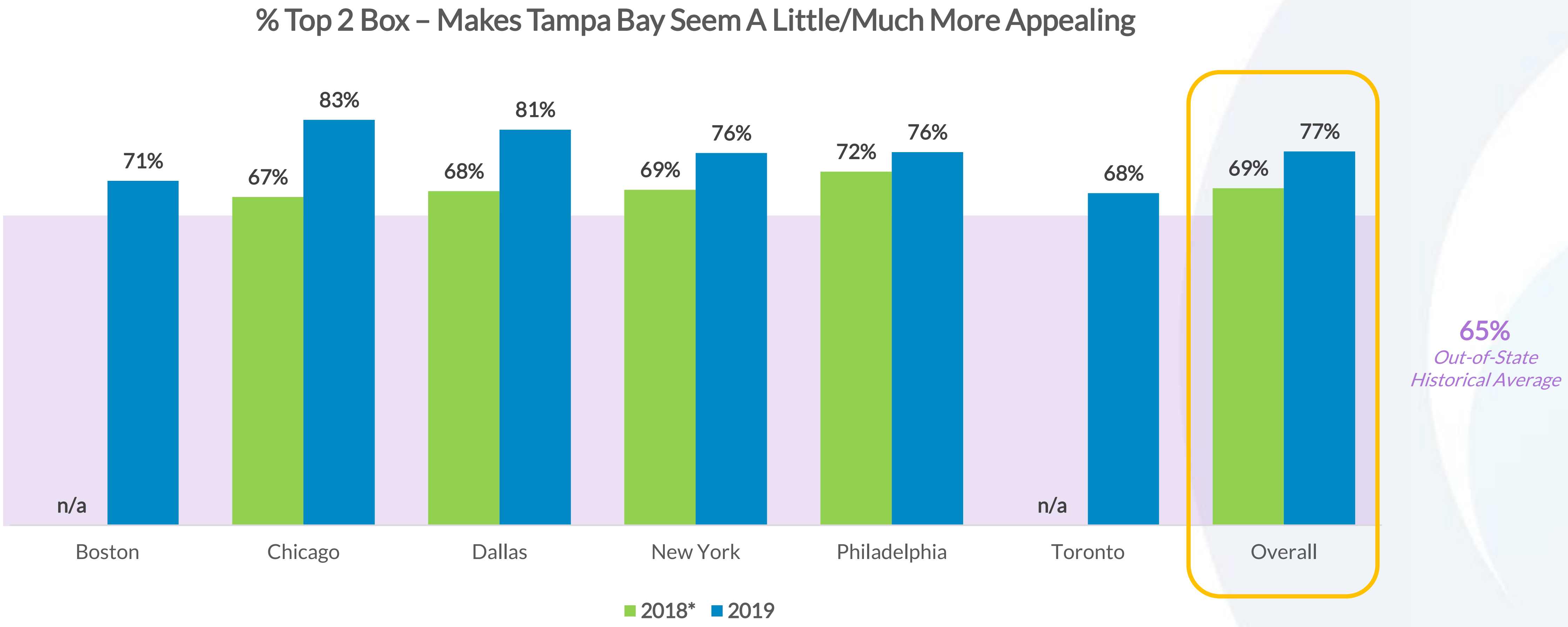
Three-quarters of travelers found this year's ads appealing, a significant increase over last year. Appeal in all markets tested previously increased significantly as well.



Q37: Using the scale provided, please rate how much you like this collection of advertisements for Tampa Bay.
**2018 Markets: Chicago, Dallas, New York, Philadelphia*

RESPONDENT BASE: ALL RESPONDENTS | N=1,400

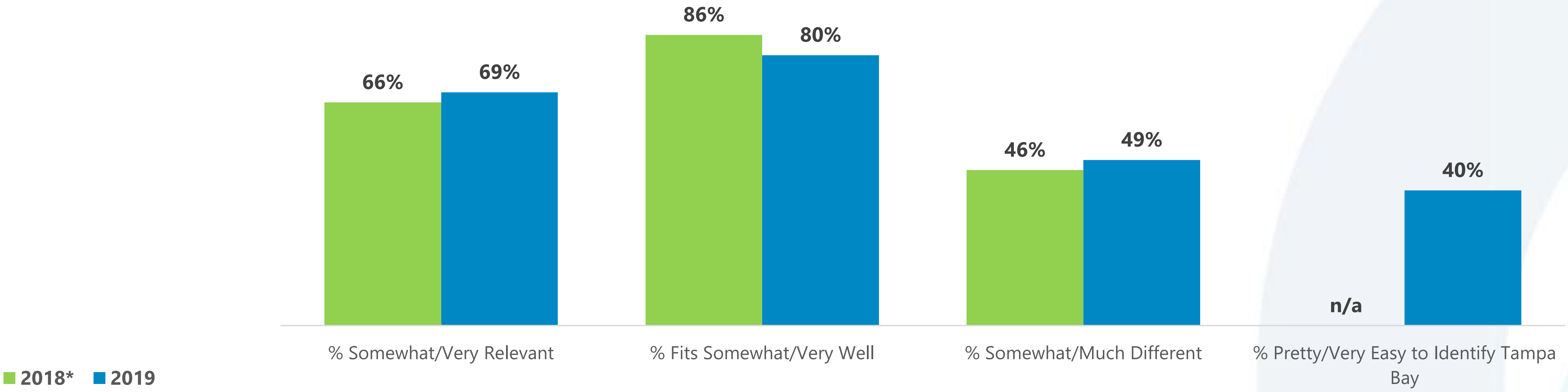
The ads' ability to make Tampa seem more appealing also increased significantly this year, with Chicago residents being impacted the most.



Q38: Using the scale provided, please indicate the degree to which these ads make Tampa Bay seem more appealing to you.
**2018 Markets: Chicago, Dallas, New York, Philadelphia*

RESPONDENT BASE: ALL RESPONDENTS | N=1,400

Tampa Bay's ads are more differentiated and relevant to travelers than they were last year, but are somewhat less of a fit.



	% Somewhat/Very Relevant	% Fits Somewhat/Very Well	% Somewhat/Much Different	% Pretty/Very Easy to Identify Tampa Bay
Tampa Historical Average	*61%*	*78%*	*45%*	*n/a*
Boston	58%	79%	41%	29%
Chicago	74%	83%	53%	45%
Dallas	74%	80%	52%	40%
New York	73%	81%	53%	44%
Philadelphia	66%	75%	46%	35%
Toronto	59%	76%	42%	35%

Q39: Using the scale provided, please rate how relevant the points made in these advertisements are to you.
Q40: Using the scale provided, please rate how well this advertisement fit with what you think about Tampa.

Q41: Using the scale provided, please indicate how different this advertisement is from other advertising you've seen for destinations.
Q42: Using the scale provided, please indicate how different these advertisements are from other advertising you've seen for destinations.

**2018 Markets: Chicago, Dallas, New York, Philadelphia*

RESPONDENT BASE:
ALL RESPONDENTS | N=1,400

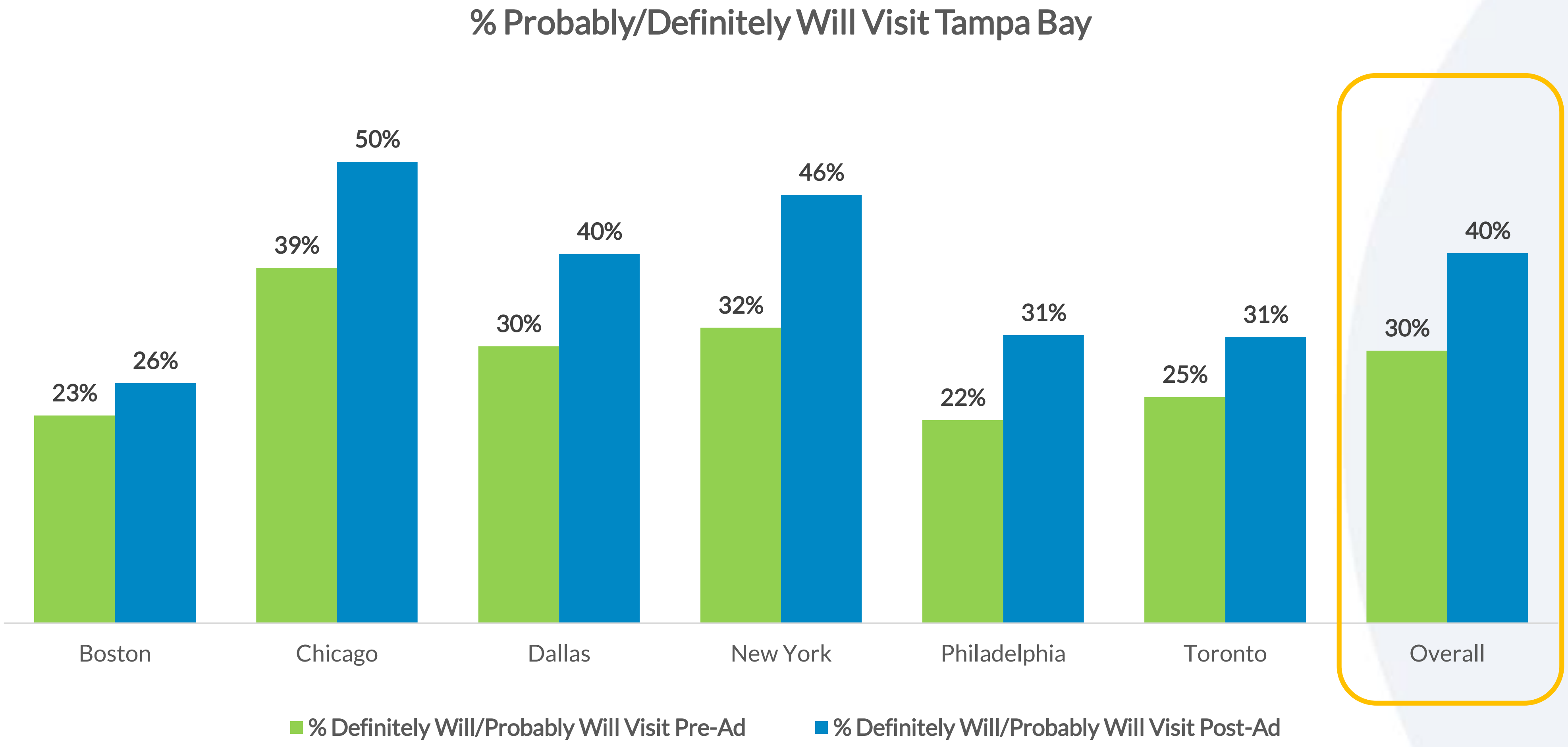
Travelers continue to agree that the ads make Tampa Bay seem like an easy place to visit and that they will search for things to do in the area after seeing the ads.

% Agree/Strongly Agree with Statements	2019	Out-of-State Historical Average
Make Tampa Bay seem like an easy place to visit for a quick getaway	68%	61%
Show me interesting new things to do that I'd like to explore	68%	60%
Make me likely to include Tampa Bay as an option for my next getaway	59%	52%
Make me want to find out more about planning a trip to Tampa Bay	58%	51%
Make me want to visit the Tampa Bay website to find out more	57%	50%
Make Tampa Bay seem like a unique destination that is different than other places I visit	57%	48%
% Probably/Definitely Would…		
Search for things to do in the Tampa area	54%	50%
Visit the Tampa travel website www.visitTampaBay.com	46%	41%
Visit with friends or family who may have visited before	42%	37%
Call or go online to request a Visitor's Guide or additional information	38%	34%
Seek out travel blogs and review sites that discuss Tampa	38%	34%
Visit Tampa social media pages (i.e., Facebook, Twitter, Instagram, etc.)	36%	29%
Book a trip to Tampa Bay	36%	31%

Q40: Based upon the message you took away from the advertisements you just reviewed, please indicate the degree to which you agree that these ads.

RESPONDENT BASE: ALL RESPONDENTS | N=1,400

Post-ad exposure lift in intent generated positive results in all advertised markets, averaging +10 points overall, much higher than the Out-of-State Historical Average of +6 points and the H2R Norm of +8 points.



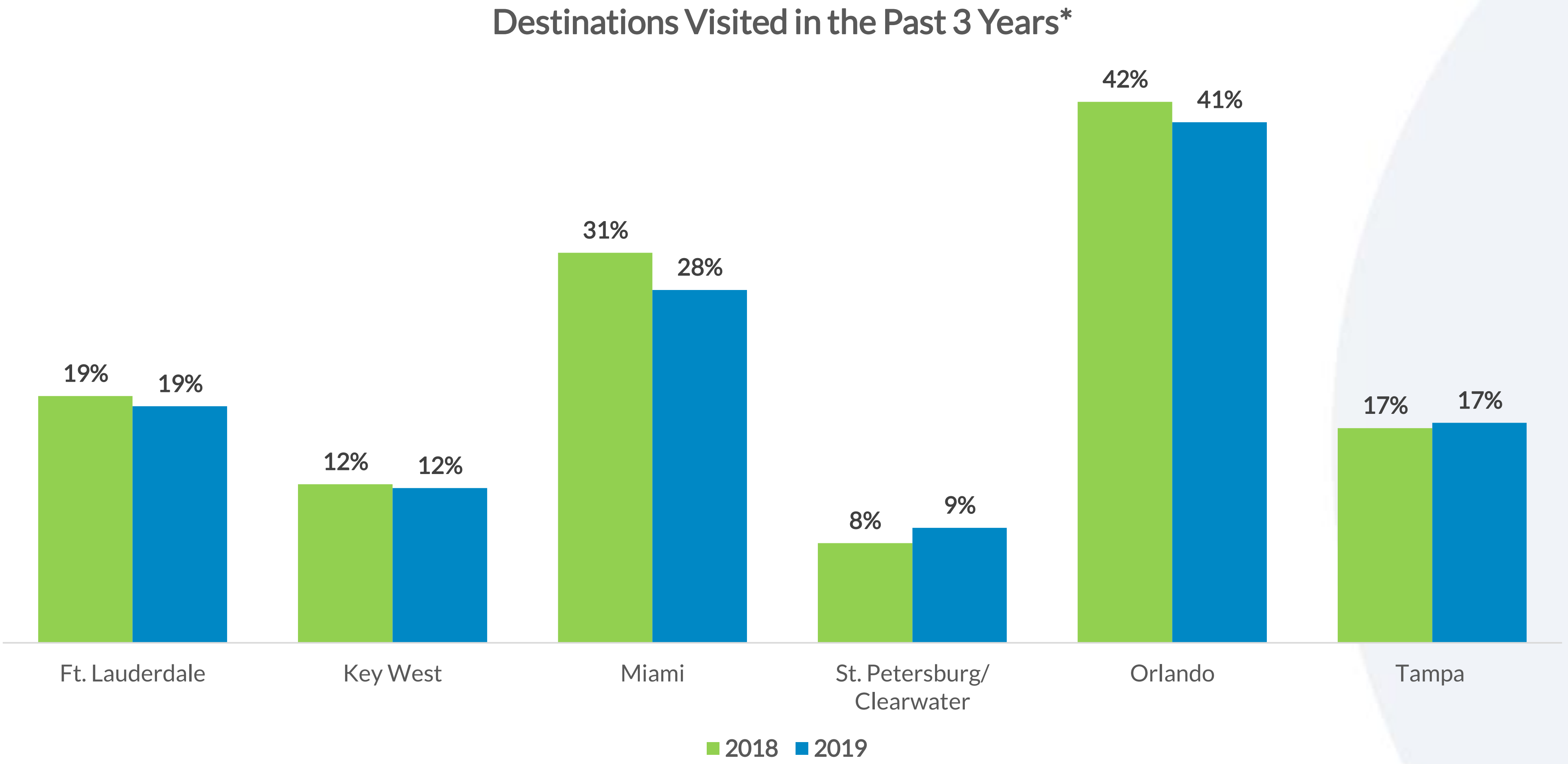
Q13: Using the scale provided, please indicate how likely you are to visit each of the following destinations in the next 12 months.
Q45: Using the scale provided, please indicate how likely you are to visit the Tampa area in the next 12 months.

RESPONDENT BASE: ALL RESPONDENTS | N=1,400

Visit Tampa Bay Marketing & Media Effectiveness

Travel Landscape

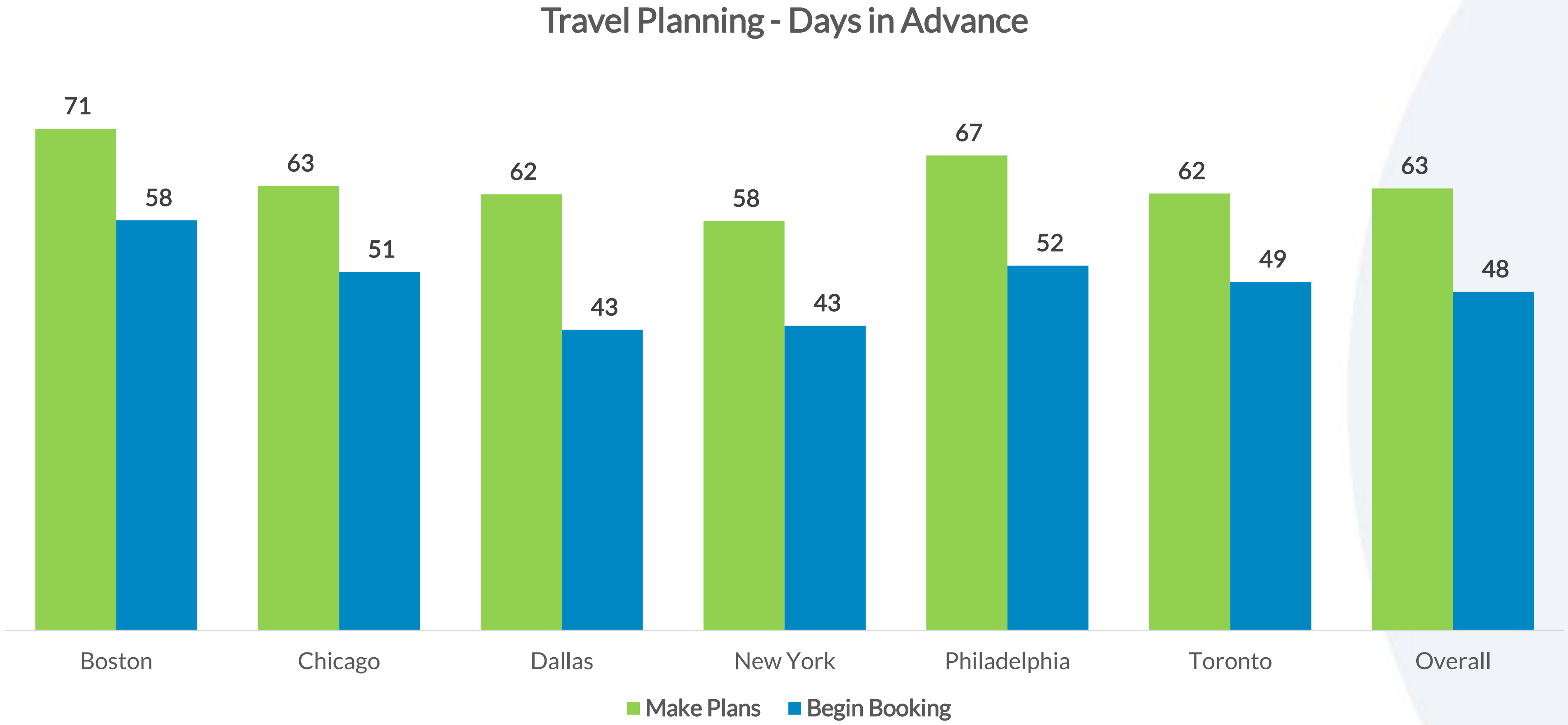
Visitation to the competitive set destinations has remained steady this year, with Orlando continuing to be the most popular destination.



Q12: Please indicate which of these destinations, if any, you have visited in the past 3 years.

RESPONDENT BASE: ALL RESPONDENTS | N=1,400

On average, travelers begin thinking about where they'd like to travel 63 days prior to their trip, and they begin booking accommodations 48 days in advance.



Q7: How many days in advance do you normally begin to consider making a decision on where you will travel on a leisure trip?
Q8: How many days in advance do you normally begin booking your travel accommodations once you've made a decision on where to visit?

RESPONDENT BASE: ALL RESPONDENTS | N=1,400

Top of mind brand awareness remains comparatively low. But, this is not unexpected given that all of these advertised markets are so far away.

<table>
<tr><th>Rank</th><th>Destination</th><th>Awareness</th></tr>
<tr><td>1</td><td>New York</td><td>2.4%</td></tr>
<tr><td>2</td><td>California</td><td>2.0%</td></tr>
<tr><td>3</td><td>Los Angeles</td><td>2.0%</td></tr>
<tr><td>4</td><td>Las Vegas</td><td>1.9%</td></tr>
<tr><td>5</td><td>Caribbean</td><td>1.5%</td></tr>
<tr><td rowspan="9">…137</td><td>Tampa</td><td rowspan="9">0.2%</td></tr>
<tr><td>Mexico</td></tr>
<tr><td>Houston</td></tr>
<tr><td>Michigan</td></tr>
<tr><td>Japan</td></tr>
<tr><td>Alaska</td></tr>
<tr><td>South Carolina</td></tr>
<tr><td>Bermuda</td></tr>
<tr><td>Australia</td></tr>
</table>

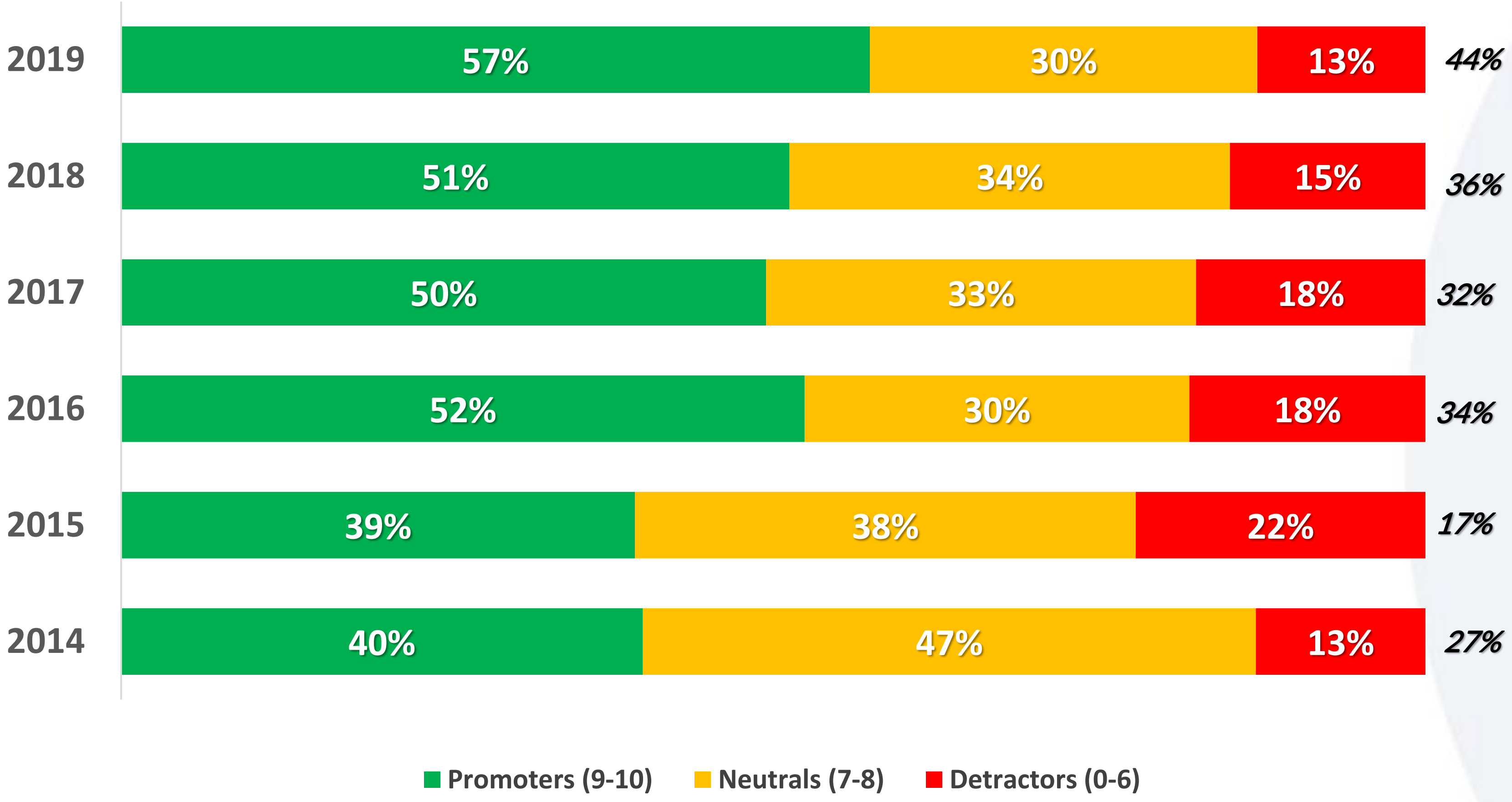
Q6: When you think of places you have visited, or would enjoy visiting, for leisure that are located in your region, which destinations first come to mind?

RESPONDENT BASE: ALL RESPONDENTS | N=1,400

Visit Tampa Bay Marketing & Media Effectiveness

Tampa Bay Traveler Profile

Brand Promoters remain well above the historical average (48%) and increased this year by 6 percentage points, driving a significant increase in overall Net Promoter Score to 44%.



Q28: How likely are you to recommend the Tampa area to a friend or family member?

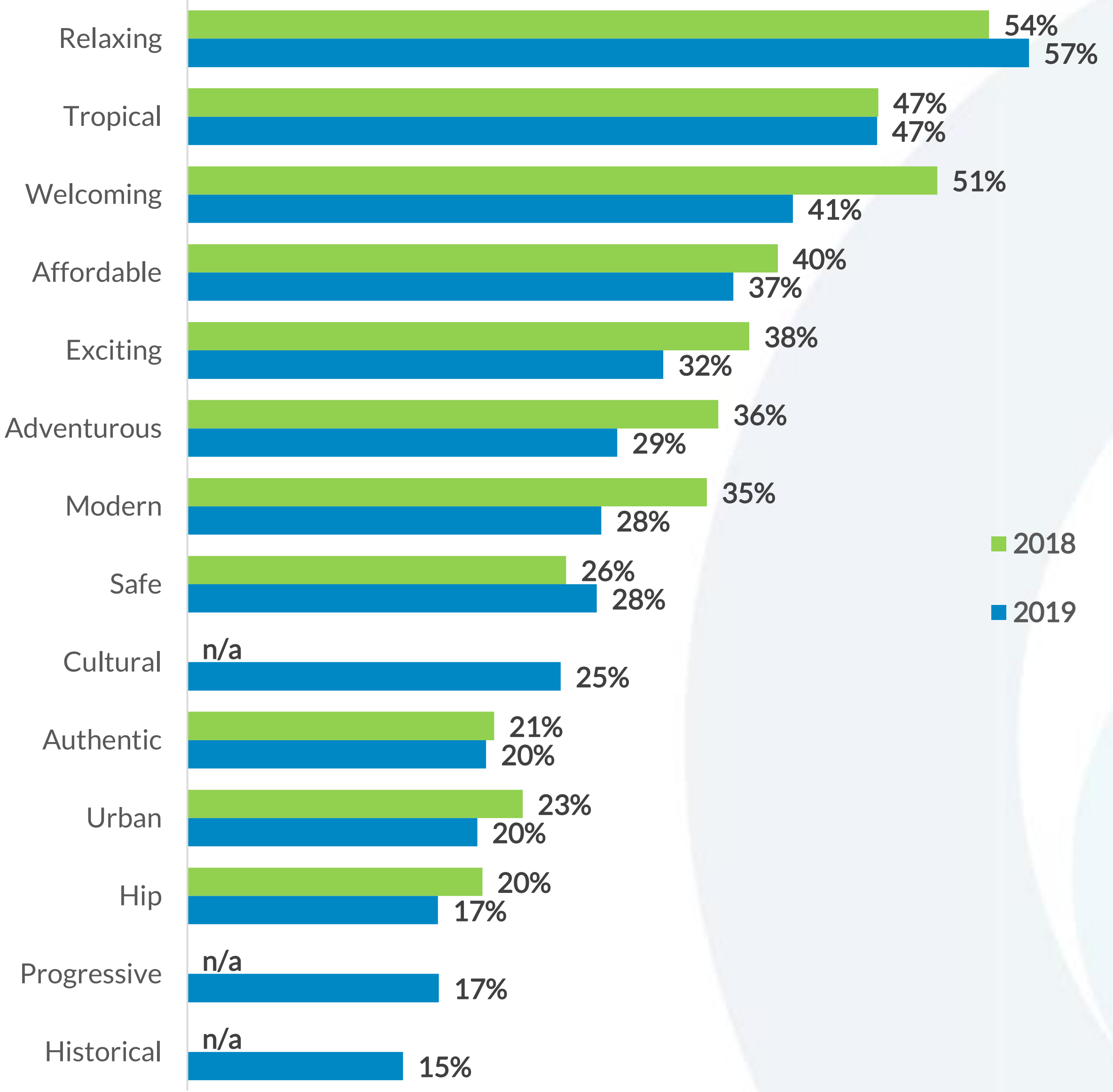
RESPONDENT BASE: TAMPA BAY VISITORS SINCE JANUARY 2019 | N=101

Tampa Bay Characteristics

Perceptions of Tampa Bay continue to evolve. This year more visitors indicated they view Tampa Bay as a relaxing and safe destination than results yielded last year.

Conversely, significantly fewer said they view Tampa Bay as welcoming, exciting, adventurous, or modern. Other characteristics are on par with last year.

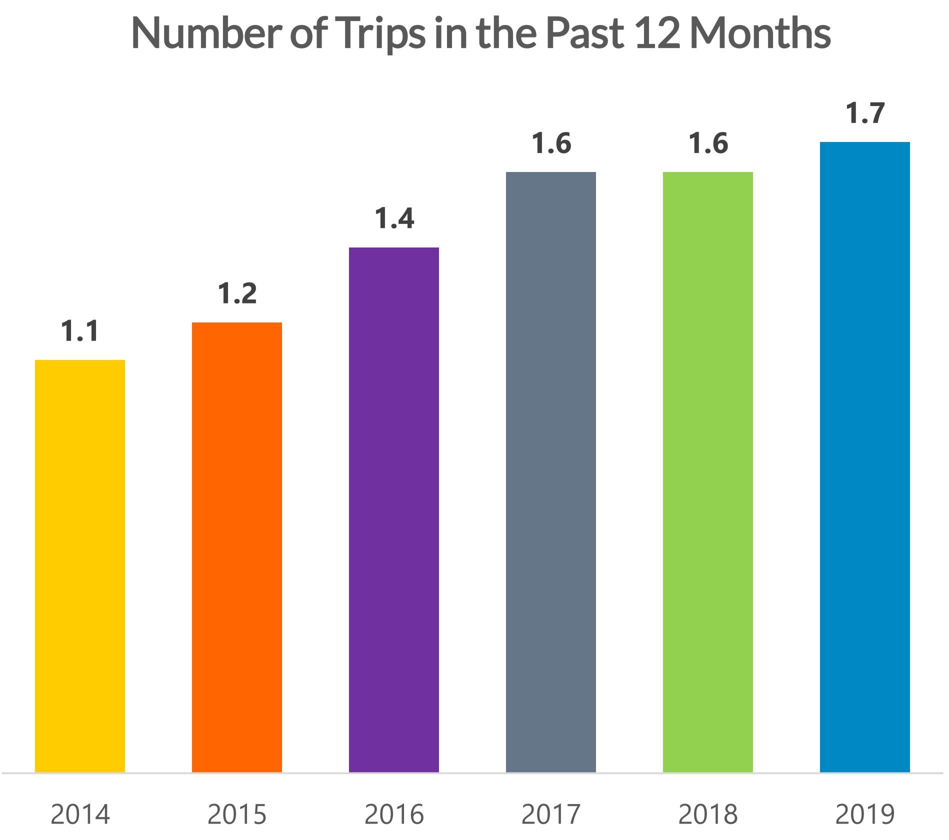
Welcoming atmospheres are extremely important to travelers and attractions visitors. In fact, it was the single most important aspect of a destination according to travelers in a nationwide study conducted by H2R Market Research. Millennial travelers (who are taking over the travel marketspace) find a welcoming atmosphere even more important than their older counterparts.

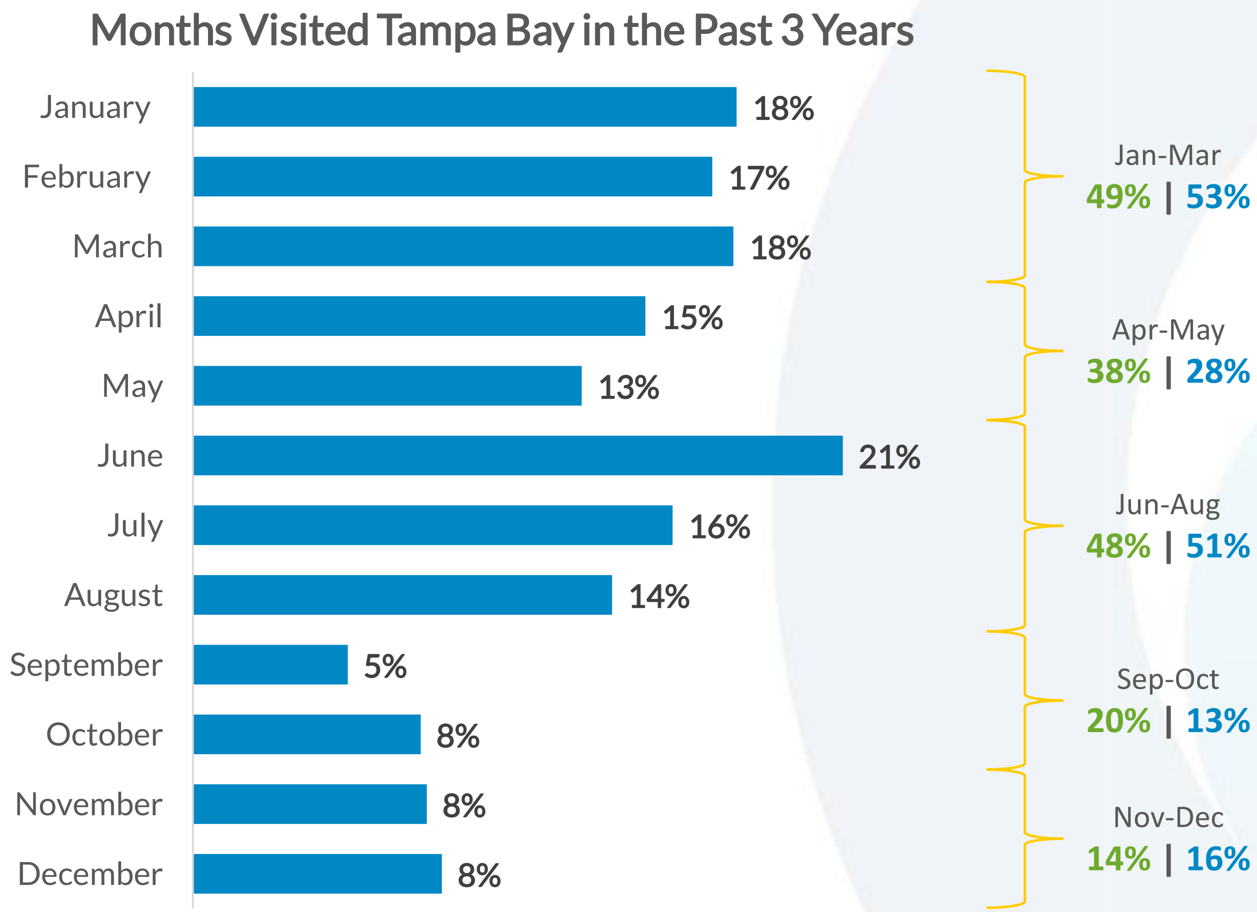


Q15: Please indicate which of the following characteristics you believe best describe the city of Tampa.

RESPONDENT BASE: TAMPA BAY VISITORS LAST 3 YEARS | N=232

The number of trips made to the Tampa area from out of state travelers continues to increase each year. The January through March time frame also continues to increase in popularity.

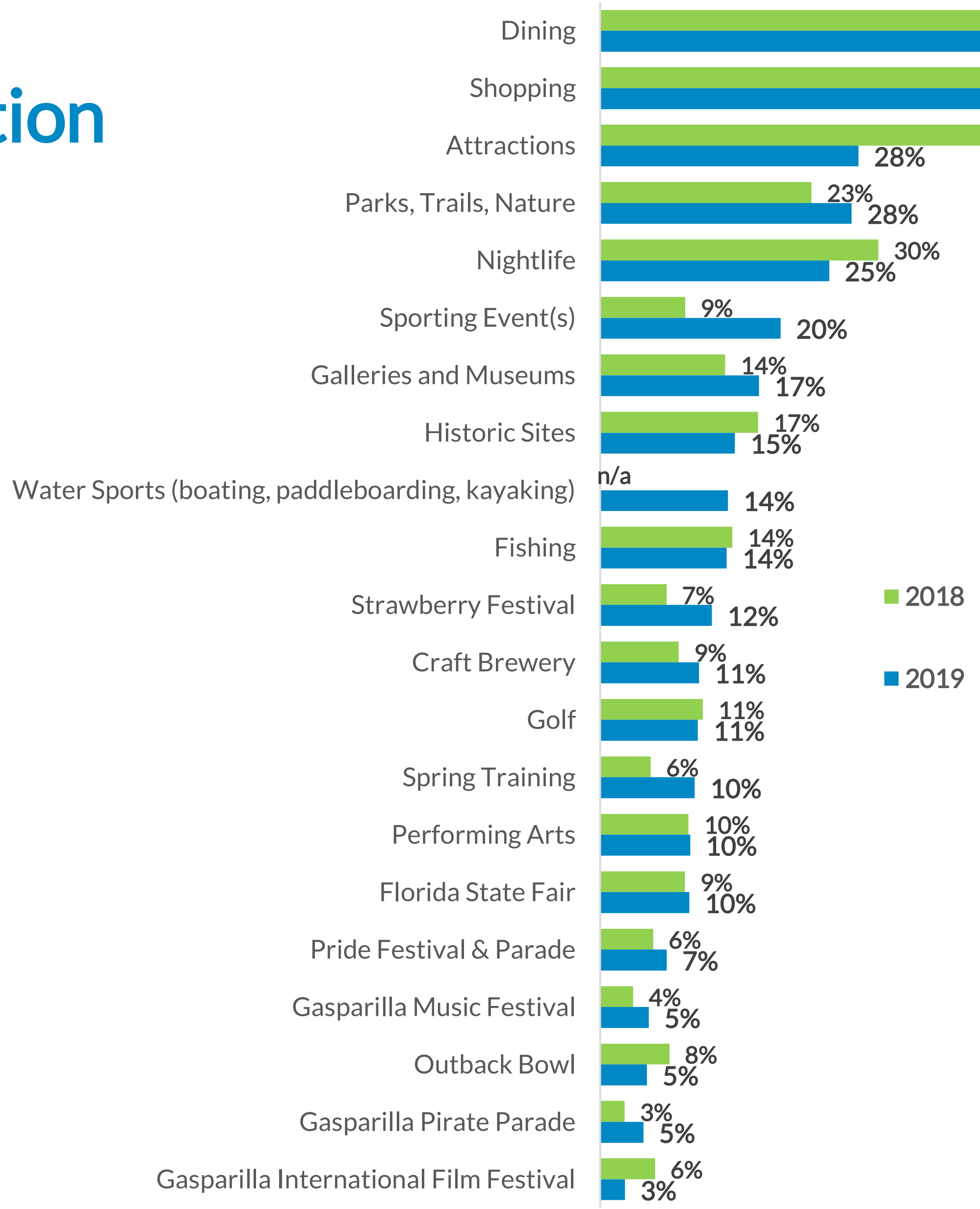




Q16: In the past 3 years, which months have you visited Tampa?
Q17: How many trips did you make to the Tampa area in the past 12 months?

RESPONDENT BASE: TAMPA BAY VISITORS LAST 3 YEARS | N=232

Area Activity Participation

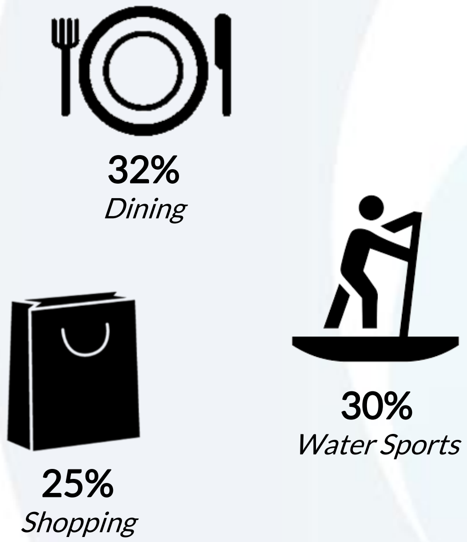


Dining, Shopping and Attractions continue to be the most popular activities for visitors; however, all three saw significant declines in participation in favor of other activities.

Activities such as sporting events, parks, trails, nature, galleries and museums, Strawberry Festival, craft breweries and Spring Training saw noted increases in participation this year.

Furthermore, it was dining, water sports and shopping that originally inspired travelers to visit Tampa.

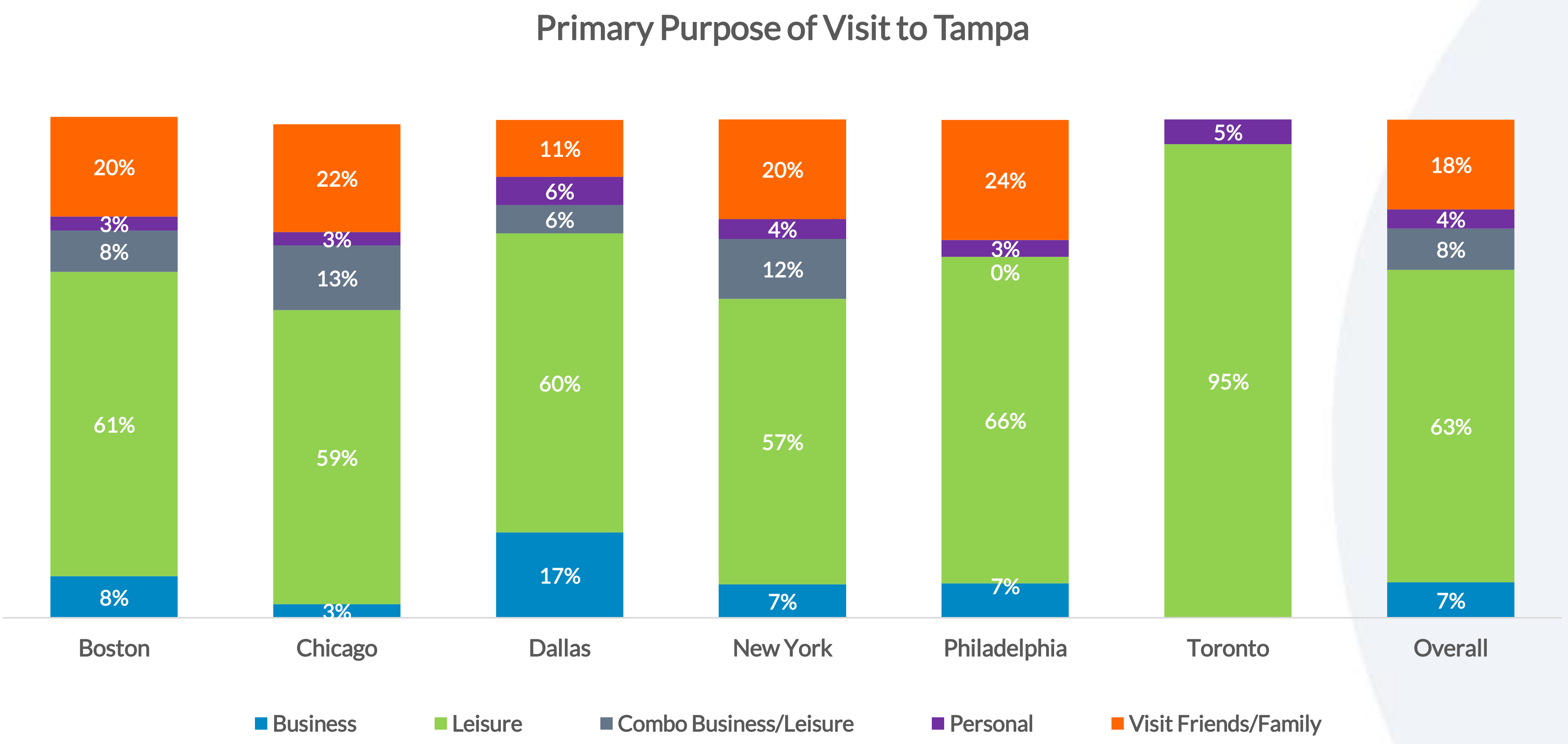
Functional Drivers



Q19: Which of the following activities or experiences, if any, did you participate in on your most recent visit to the Tampa area?
Q20: 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.

RESPONDENT BASE: TAMPA BAY VISITORS LAST 3 YEARS | N=232

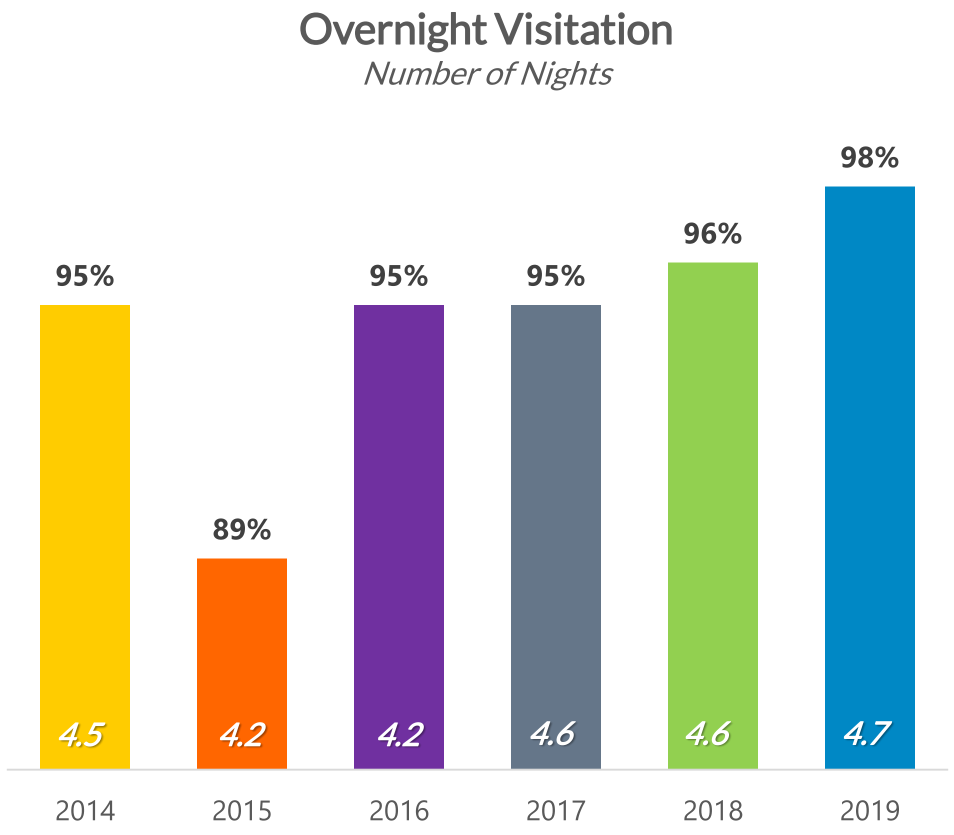
The majority of Tampa visitors from each market visited the area on a leisure getaway—with those visiting from Toronto only visiting for leisure or personal reasons.



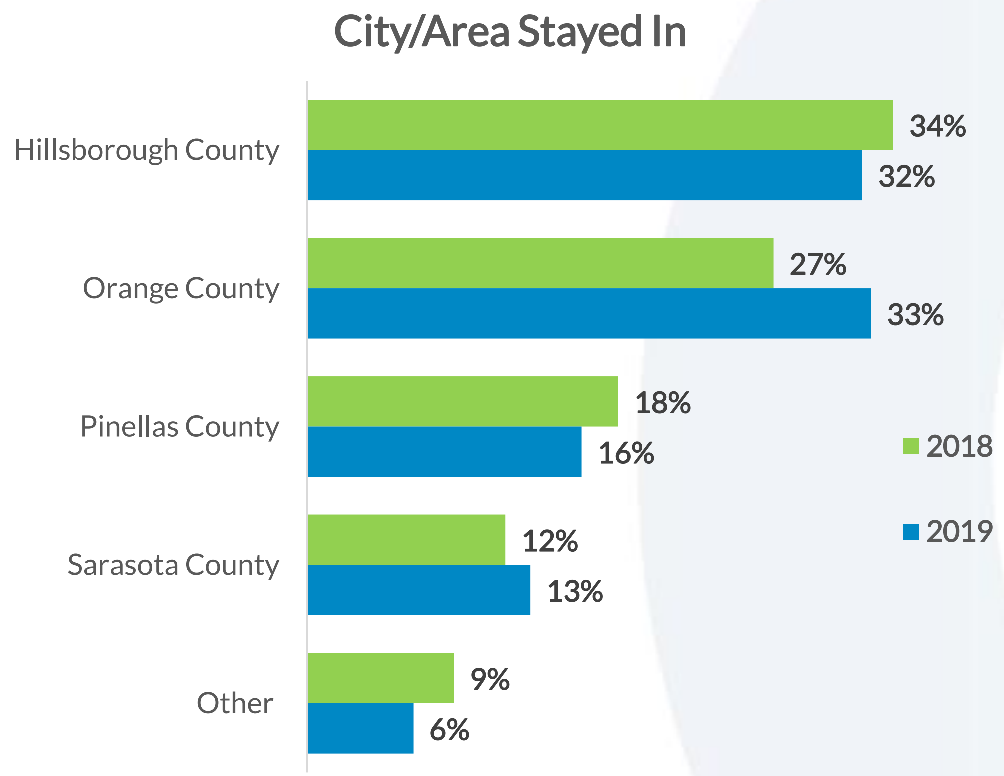
Q18: Which of the following was your primary purpose for this visit?

RESPONDENT BASE: TAMPA BAY VISITORS LAST 3 YEARS | N=232

Overnight visitation has continued to increase from out-of-state markets, as well as length of stay. Hillsborough County and Orange County are the two most popular regions to stay.



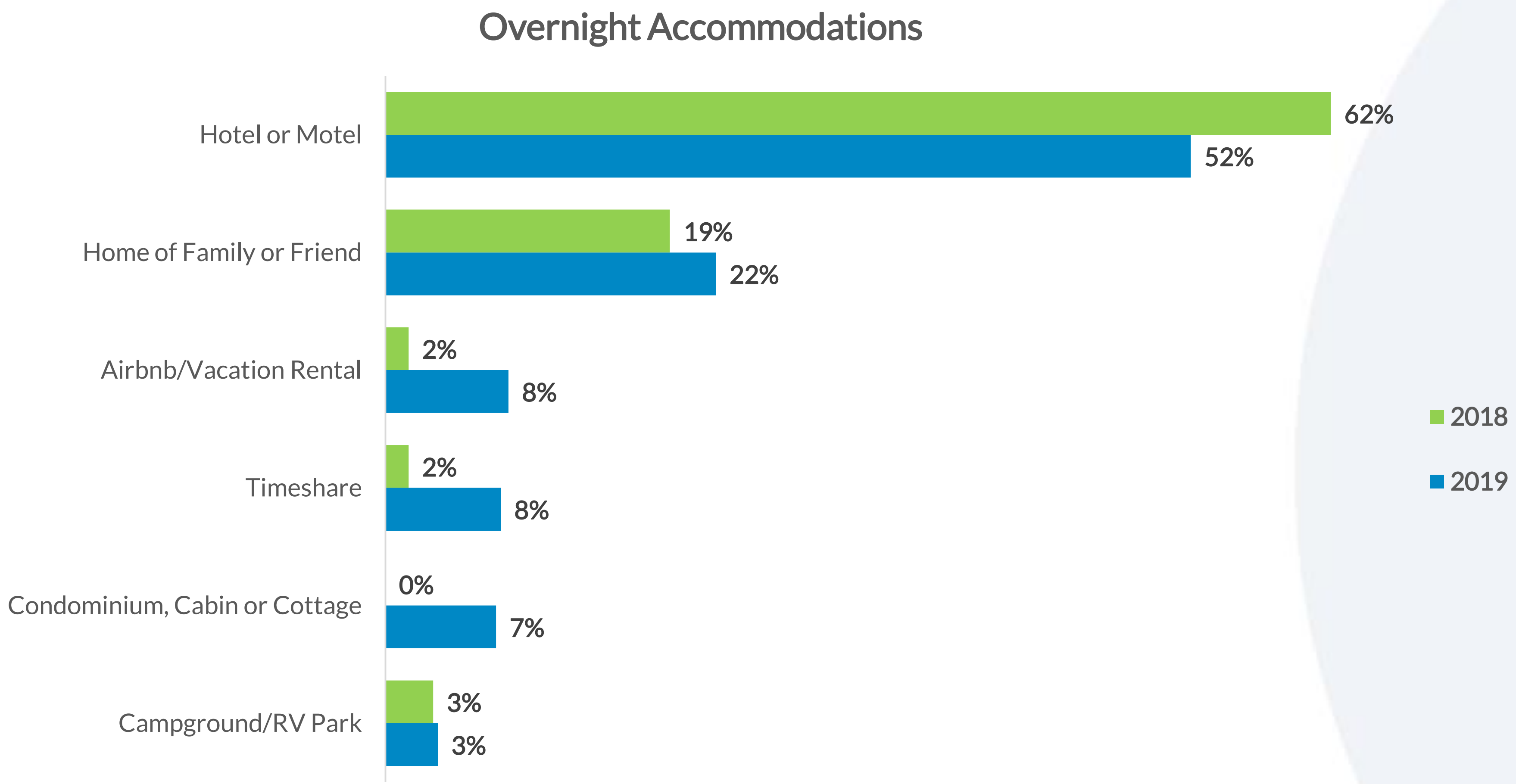
RESPONDENT BASE: TAMPA BAY VISITORS LAST 3 YEARS | N=232



RESPONDENT BASE: ALL OVERNIGHT VISITORS | N=227

Q22: How many nights did you spend in the area on this trip?
Q23: In which of the following cities/areas did you spend the night on your most recent visit to the Tampa area?

Hotels remain the most popular option for overnight visitors, but hotels experienced a noted decline in favor of staying with family, friends, vacation rentals, timeshares or condos/cabins/cottages.



Q24: Which of the following best describes the type of accommodations you used on your most recent trip?

RESPONDENT BASE: OVERNIGHT VISITORS WHO STAYED IN HILLSBOROUGH COUNTY | N=74

Tampa Bay Non-Visitors are older, earn lower incomes and are less ethnically diverse than visitors and brand advocates. Those most likely to recommend visiting are the most diverse and are heavily influenced by the advertising.

	Tampa Bay Recent Visitors	Tampa Bay Non-Visitors	Prospects*	Brand Advocates**
Respondent Age	37	45	38	38
Children in the Home	48%	33%	48%	48%
No Children	52%	67%	52%	52%
Males	55%	34%	41%	40%
Females	45%	66%	59%	60%
HH Income	$80.2k	$78.8k	$76.5k	$77.2k
Caucasian/White	65%	69%	56%	54%
African American/Black	11%	10%	15%	16%
Hispanic/Latin American	15%	10%	13%	14%
Asian/Pacific Islander	11%	9%	15%	15%
Other Ethnicity	3%	7%	8%	8%
% College Graduate +	55%	55%	52%	53%
Distance from Tampa Bay	1,026 miles	1,036 miles	1,025 miles	1,022 miles
Advertising Awareness	71%	33%	63%	64%
Post-Ad Intent Lift	+8%	+11%	+42%	+44%

**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!

H2R
MARKET RESEARCH

Reveal Your Customer's Full Experience

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

417.877.7808

@H2RMktResearch