VISIT TAMPA BAY

TREASURE AWAITS

2016 In-State Campaign Marketing & Media Effectiveness

Prepared by

H2R MARKET RESEARCH

Project Overview

PURPOSE

The purpose of this study was to measure the incremental impact Tampa Bay's In-State Marketing Campaign had on visitation and spending and to calculate a marketing ROI. The 2016 In-State Marketing & Media Effectiveness Research measured the entire In-State marketing campaign for Visit Tampa Bay. In the past, campaigns were measured seasonally, so any comparisons to past campaigns should be made with caution as they would be much smaller than the overarching campaign.

TARGET AUDIENCE

The Tampa Bay In-State Marketing & Media Effectiveness study was conducted among travelers living in select feeder markets: Orlando, Miami, Fort Myers, West Palm Beach and Jacksonville. The research was conducted in August/September of 2016 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 1,205 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 +/-6.3% per individual market (sample size per market=approximately 240).

Contents

EXECUTIVE SUMMARY

Pages 4-8

01

Marketing Efficiency

Pages 9-18

+ Aided paid media awareness
+ Marketing & Media reach
+ Marketing efficiency

02

Incremental Impact

Pages 19-26

+ Incremental travel
+ Incremental trips
+ Incremental travel spending
+ Return on Investment (ROI)

03

Advertising Evaluation

Pages 27-33

+ Ratings of creative appeal
+ Impact on consumer behavior
+ Marketing messages' impact on intent to visit

04

Travel Landscape

Pages 34-37

+ Competitive travel landscape
+ Making travel plans

05

Tampa Bay Traveler Profile

Pages 38-47

+ Tampa Bay traveler behavior
+ Activity participation and functional drivers
+ Accommodations, length of stay and more
+ Tampa Bay visitors' demographic profile

Executive Summary

Marketing Efficiency

- Overall awareness of Tampa Bay's 2016 In-State campaign reached 48%, and extrapolated across the population of traveler households equates to approximately 2.2 million aware households.

- With a gross media investment of $402k in the In-State Campaign, Tampa Bay's cost per aware household averaged $0.19 overall (and $0.17 for the net investment of $357k). Marketing awareness that costs less than $.50/aware household is considered extremely efficient in the travel and tourism industry, and Tampa Bay's In-State Campaign continues to efficiently increase visitation to the area.

- Television advertising generated the highest awareness this year (30%). However, Billboards and street teams were the most efficient at a cost of just $0.02/aware travel household.

Incremental Impact

- Tampa's In-State Campaign brought incremental visitation to the area that would not have occurred otherwise. Extrapolated across aware households, incremental visitation accounted for more than 40k additional trips to the area. And, given travel spending of more than $600 per party, the campaign generated more than $25M in incremental travel revenue.

- The campaign also benefited the local economy by generating more than 66k incremental room nights for the county of Hillsborough alone. Of those 66k incremental room nights, 46k were generated from one of 14 downtown Tampa hotels.

- Overall, Tampa Bay's In-State Campaign generated a Gross ROI of $63, slightly higher than the total of the three seasonal in-state campaigns from 2015 with a slightly lower investment. Additionally, this year's campaign generated $372k more dollars in incremental spending than was generated last year.

Advertising Evaluation

- More than half (55%) of travelers found the advertisements appealing, with those from Miami finding them most appealing (60%). The H2R Industry Norm stands at 58% top 2 box appeal. More than six in ten travelers (63%) also indicated the ads made Tampa Bay seem more appealing as a destination.

- The primary messages taken away from the advertisements were they make the area look like it's an easy place to visit for a quick getaway (71%) and that it has interesting new things to do that they'd like to explore (62%). More importantly, the ads would inspire 57% of travelers to search for things to do in the area and 45% to visit the official website.

- The ads also had a positive impact on intent to visit the area in the next 12 months, increasing six percentage points overall after respondents were exposed to the ads.

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

Tampa Bay's 2016 In-State Marketing Campaign generated a Gross ROI of $63, while spending without media commissions produced a Net ROI of $71.

Compared to all three in-state campaigns in 2015 (Summer, Arts & Culture and Beer) there was a decrease in ad spending (-$19k) this year. Because each campaign was measured separately in 2015, adding incremental measurements together isn't an exact comparison due to overlap in the campaigns that can't be quantified. However, if one were to do this, this year's campaign generated more incremental spending (+$372k) with a higher ROI ($60 in 2015)—even with the possible overstatements from last year.

Key Performance Indicator	Gross Spending	Net Spending*
Aware Households	2.2M	2.2M
Incremental Visitation	+1.9%	+1.9%
Incremental Trips	40.6k	40.6k
Incremental Revenue	$25.5M	$25.5M
Media Investment	$402k	$357k
Cost/Aware Household	$0.19	$0.17
Return on Investment	$63	$71

**Net Spending does not include Media Commissions paid for the In-State Marketing Campaign.*

Marketing Efficiency

+ *Aided paid media awareness*
+ *Marketing & Media reach*
+ *Marketing efficiency*

01

MARKETING EFFICIENCY KPIs*

48% of travelers saw or heard a Tampa Bay In-State advertisement

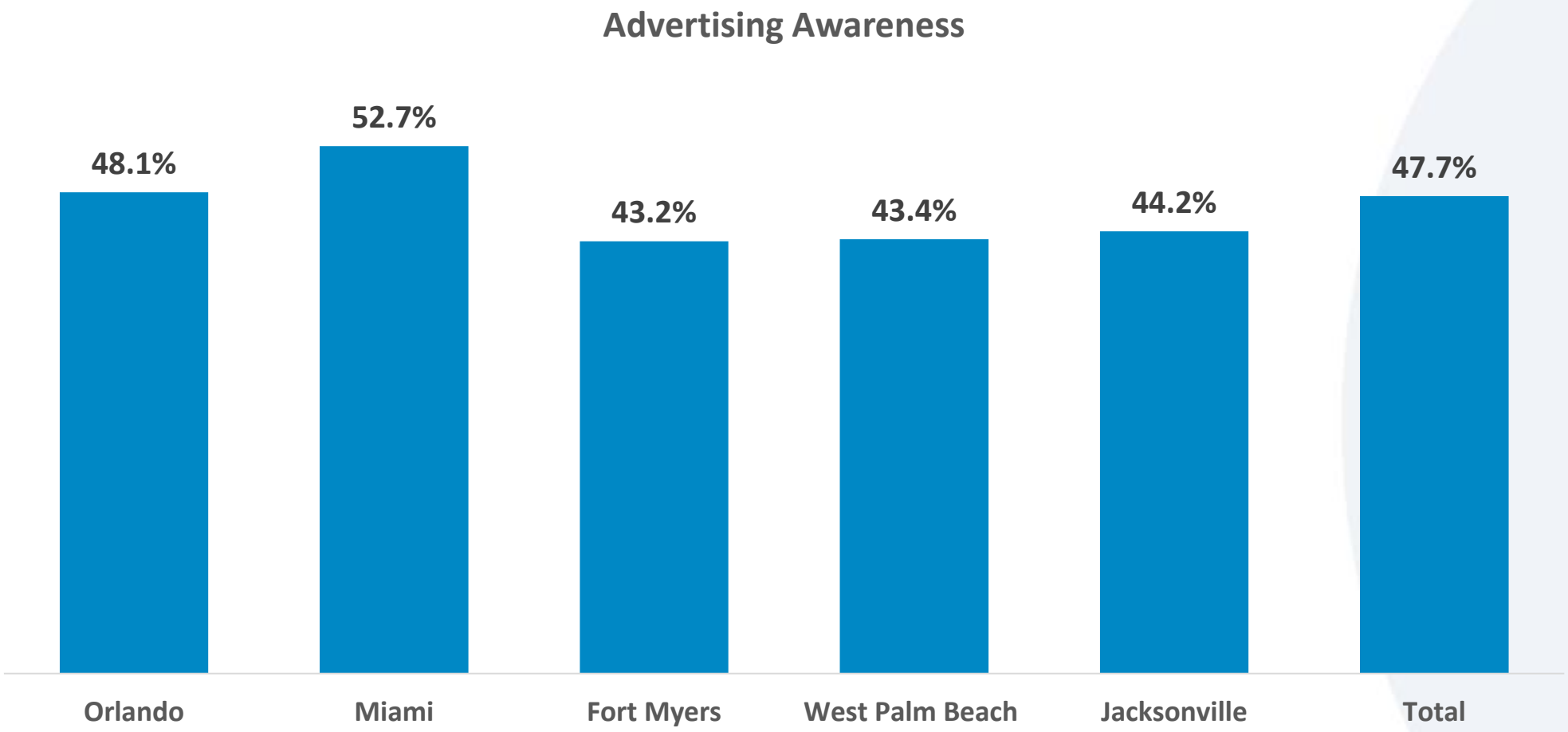
Tampa Bay's In-State Campaign reached **2.2 million** households

The gross cost per aware household averaged **$0.19**

Tampa Bay invested **$402k** in Gross Advertising for the In-State Campaign

**KPIs = Key Performance Indicators*

The In-State campaign produced awareness among nearly half of travelers in the target markets. Miami showed the highest awareness this year.



Q25-28: Have you seen this advertisement?

**The Direct Comparison Line includes only the 2016 markets (Boston, Chicago, Dallas and Detroit) for 2015.*

RESPONDENT BASE: ALL RESPONDENTS | N=1,205

Market Reach (Aware Traveler Households)

Tampa Bay's In-State Marketing Campaign generated a market reach of 2.2 million traveler households, or 48% of the target markets.

Advertising in Miami generated the highest awareness in terms of both percentage of the market and aware households. This was followed closely by aware households in Orlando.

Market	Total Ad Awareness	Total Market Reach
Orlando	48.1%	642k
Miami	52.7%	732k
Fort Myers	43.2%	201k
West Palm Beach	43.4%	316k
Jacksonville	44.2%	261k
Total Market	**47.7%**	**2.2M**

GROSS Marketing Efficiency (Cost per Aware Household)

The Tampa Bay In-State Marketing Campaign efficiently reached travelers in these target markets.

The investment of $402k reached 2.2M households at a cost of just $.19 per aware household. This is extremely efficient as anything below $1.00 in the travel industry is considered ideal and anything below $.50 is excellent.

Market	GROSS Investment	Total Market Reach	Cost/HH
Orlando	$107,204	642k	$0.17
Miami	$121,374	732k	$0.17
Fort Myers	$39,041	201k	$0.19
West Palm Beach	$73,677	316k	$0.23
Jacksonville	$61,023	261k	$0.23
Total Market	**$402,319**	**2.2M**	**$0.19**

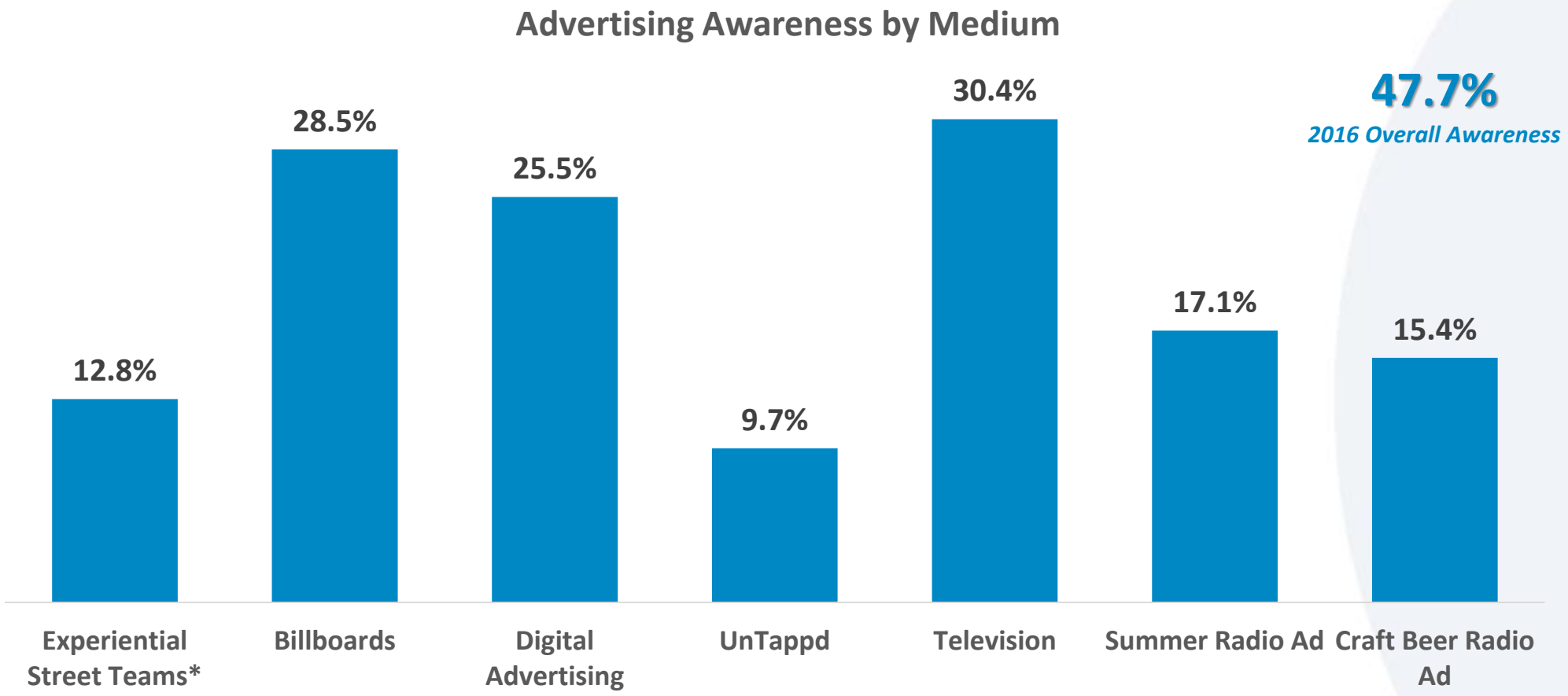
NET Marketing Efficiency (Cost per Aware Household)

Tampa Bay's NET investments were also extremely efficient, averaging $0.17 per aware household.

Orlando and Miami were tied for the most efficient, averaging just $0.15 per aware household.

Market	NET Investment	Total Market Reach	Cost/HH
Orlando	$95,962	642k	$0.15
Miami	$108,230	732k	$0.15
Fort Myers	$34,378	201k	$0.17
West Palm Beach	$63,690	316k	$0.20
Jacksonville	$54,384	261k	$0.21
Total Market	**$356,644**	**2.2M**	**$0.17**

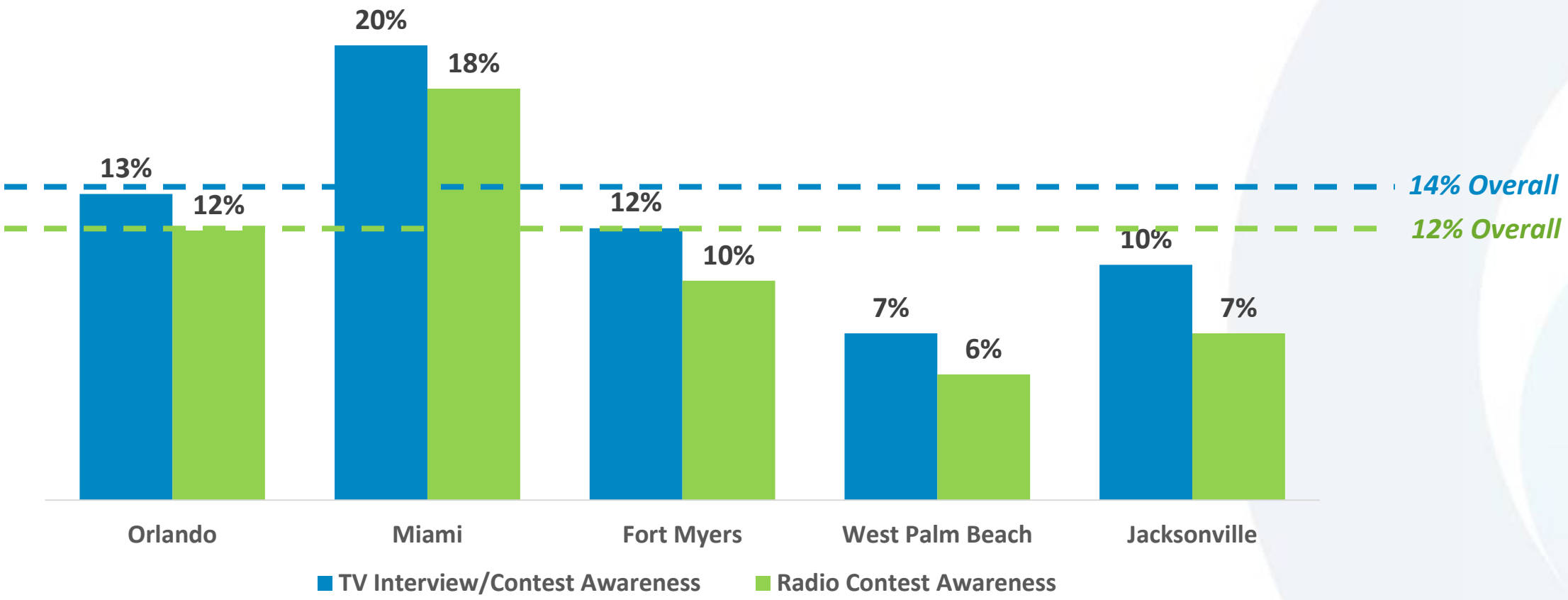
Cable TV and Billboards generated the highest awareness for the In-State campaign this year, and with crossover between mediums, the total awareness for the campaign reached 48%



Q25-28: Have you seen this advertisement?
*The Experiential Street Teams were in Orlando and West Palm Beach only.

RESPONDENT BASE: ALL RESPONDENTS | N=1,205

Overall, around 1 in 7 travelers in the target markets saw a TV interview/contest or heard a radio contest regarding Tampa.



Q29: Have you seen interviews or contests on TV regarding Tampa?
Q32: Have you heard any radio contests regarding Tampa?

RESPONDENT BASE: ALL RESPONDENTS | N=1,205

Television Drives Awareness, Billboards/Street Teams Most Efficient

Television ads reached 1.4M households at a cost of just $0.13/household. However, both Street Teams and Billboards cost just $0.02/household.

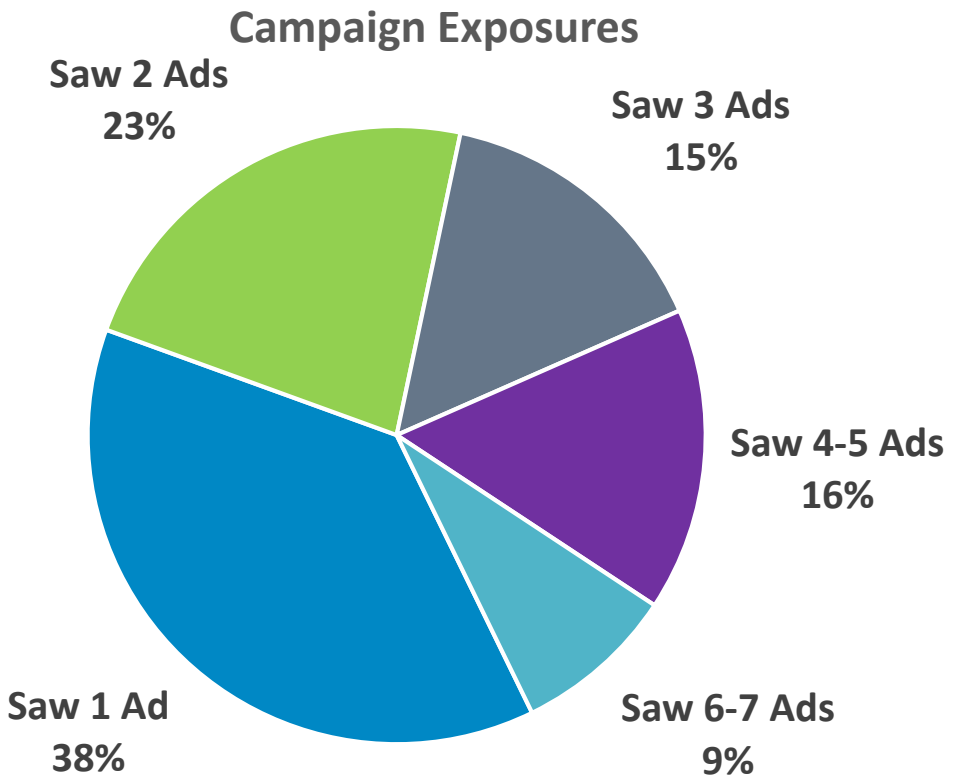
Billboards and Digital advertising both reached nearly as many households as television advertising - just as, or more, efficient than television.

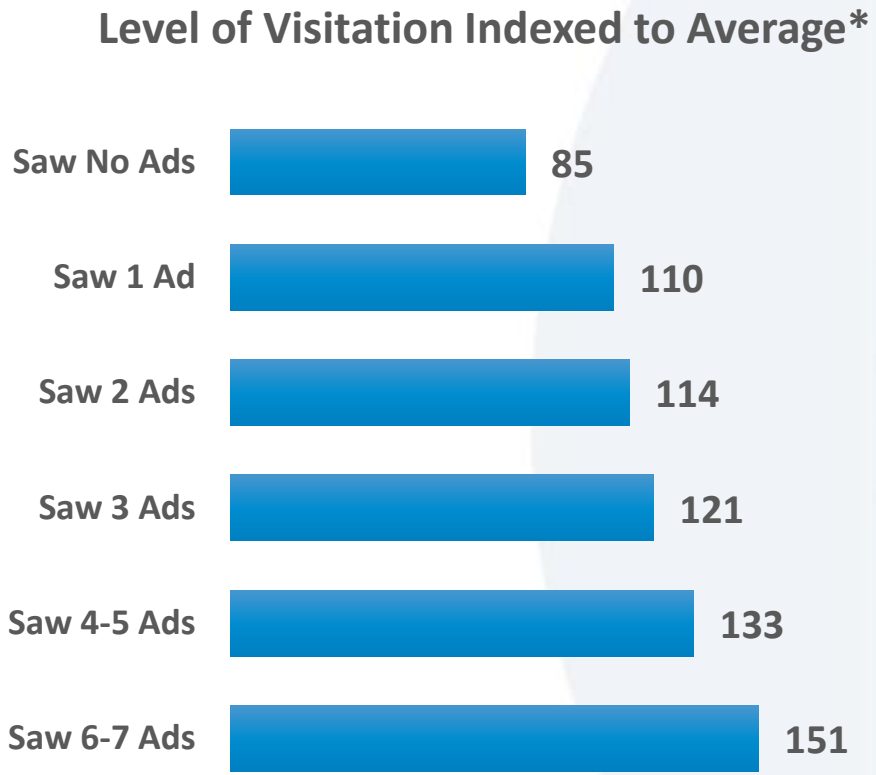
Medium	Market Reach	GROSS Investment	GROSS Cost/HH	NET Cost/HH
Street Teams	0.3M	$6.2k	$0.02	$0.02
Billboards	1.2M	$28.6k	$0.02	$0.02
Digital Advertising	1.2M	$97.8k	$0.08	$0.08
Television Ads	1.4M	$184.5k	$0.13	$0.11
Radio	0.9M	$85.1k	$0.09	$0.08

Q25-28: Have you seen this advertisement?

RESPONDENT BASE: ALL RESPONDENTS | N=1,205

The more ads travelers were exposed to, the more likely they were to visit the Tampa area. Those exposed to the most ads were 66% more likely to have visited than those exposed to none.





Q25-28: 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=1,205

Incremental Impact

+ *Incremental travel*
+ *Incremental trips*
+ *Incremental travel spending*
+ *Return on Investment (ROI)*

02

MARKETING RETURN KPIs

Tampa Bay's In-State Marketing Campaign resulted in **40.6k** incremental trips

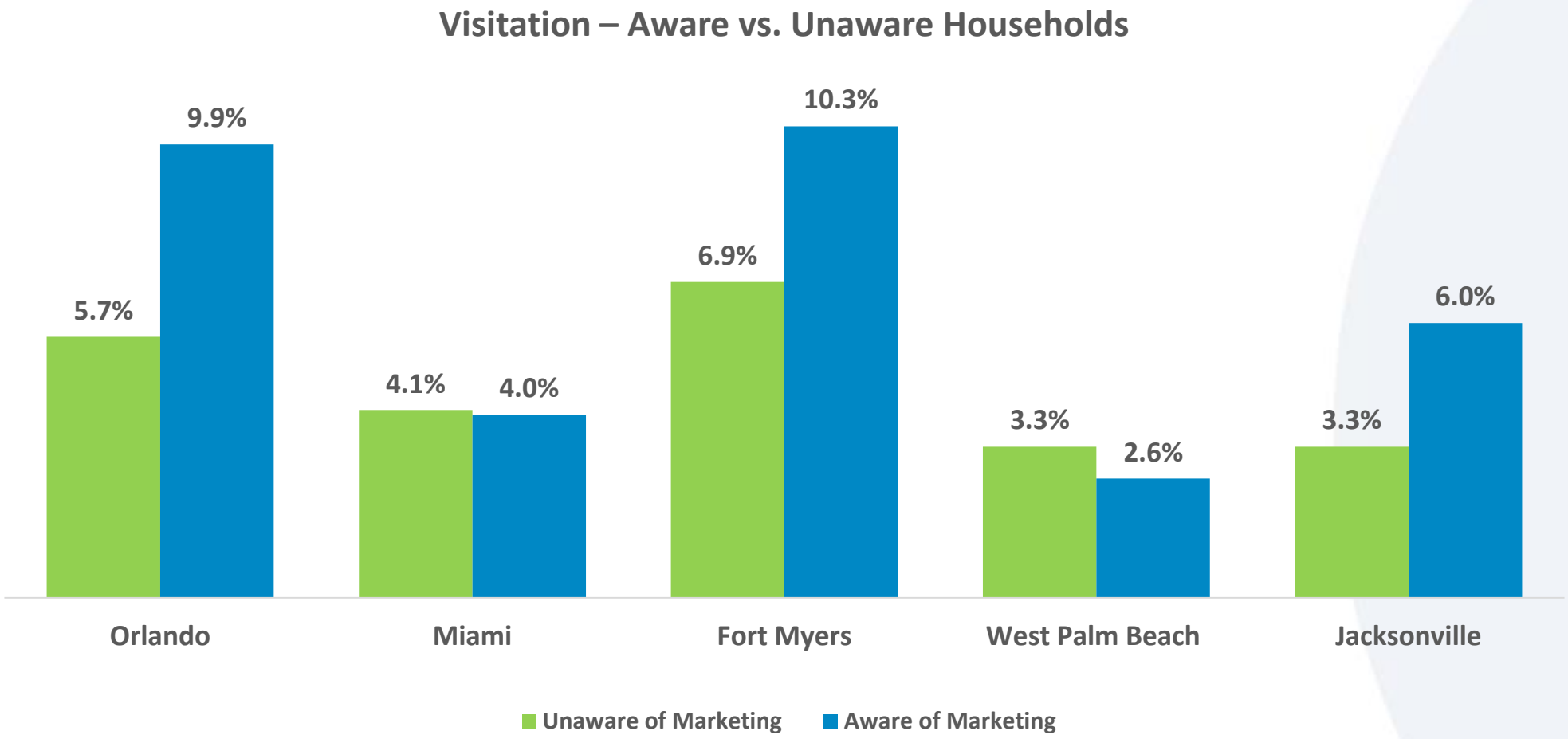
$25.5 million was generated in incremental travel spending

Incremental room nights totaled **66k**

Tampa Bay invested **$402k** in gross marketing expenditures

Gross ROI was **$63**
Net ROI was **$71**

Advertising generated incremental visitation from the closer markets of Orlando, Fort Myers and Jacksonville.



Q9: Have you visited Tampa (the shaded area on the map above) since May of this year (2016)?

RESPONDENT BASE: TAMPA BAY VISITORS SINCE MAY 2016 | N=285

Incremental Visitation

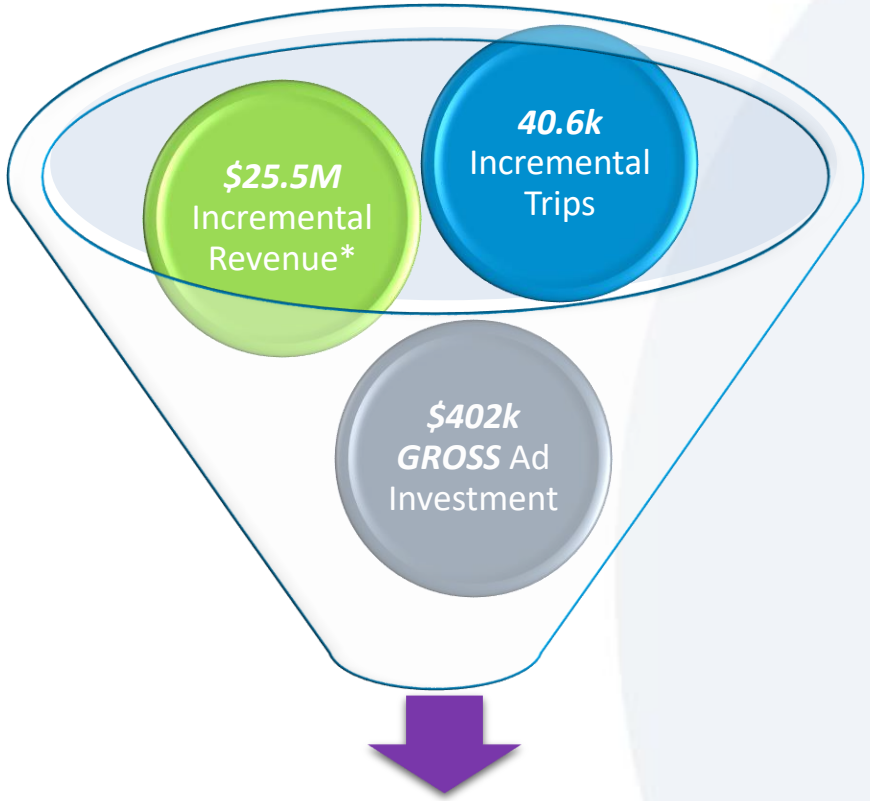
Extrapolated across the number of aware households in the target markets, the In-State campaign generated more than 40k trips that would not have occurred otherwise.

The largest number of incremental trips was generated from the Orlando market, with more than half of the total incremental trips coming from there.

Market	Total Market Reach	Incremental Travel	Incremental HH Trips
Orlando	642k	+4.1%	+26.6k
Miami	732k	0.0%	-
Fort Myers	201k	+3.4%	+6.8k
West Palm Beach	316k	+0.0%	-
Jacksonville	261k	+2.8%	+7.2k
Total Market	**2.2M**	**+1.9%**	**+40.6k**

Tampa Bay's In-State Marketing Campaign generated a GROSS ROI of $63 for every dollar invested.

Party Trip Spending
$628



$63 GROSS Return on Investment

$357k NET Ad Invest | $71 NET Return on Investment

*Incremental revenue is revenue generated that, without advertising, would not have occurred.

RESPONDENT BASE: TAMPA BAY VISITORS PAST 3 YEARS | N=599

Incremental Spending

With additional visits comes additional spending in the area. Incremental spending totaled more than $25M this year.

The three markets which generated incremental visitation in turn generated the incremental spending for the area. Orlando once again generated the greatest spending in the Tampa area.

Market	Incremental HH Trips	Spending/ Party	Incremental Spending
Orlando	+26.6k	$607	$16.1M
Miami	-	$781	-
Fort Myers	+6.8k	$582	$4.0M
West Palm Beach	-	$625	-
Jacksonville	+7.2k	$749	$5.4M
Total Market	**+40.6k**	**$628**	**$25.5M**

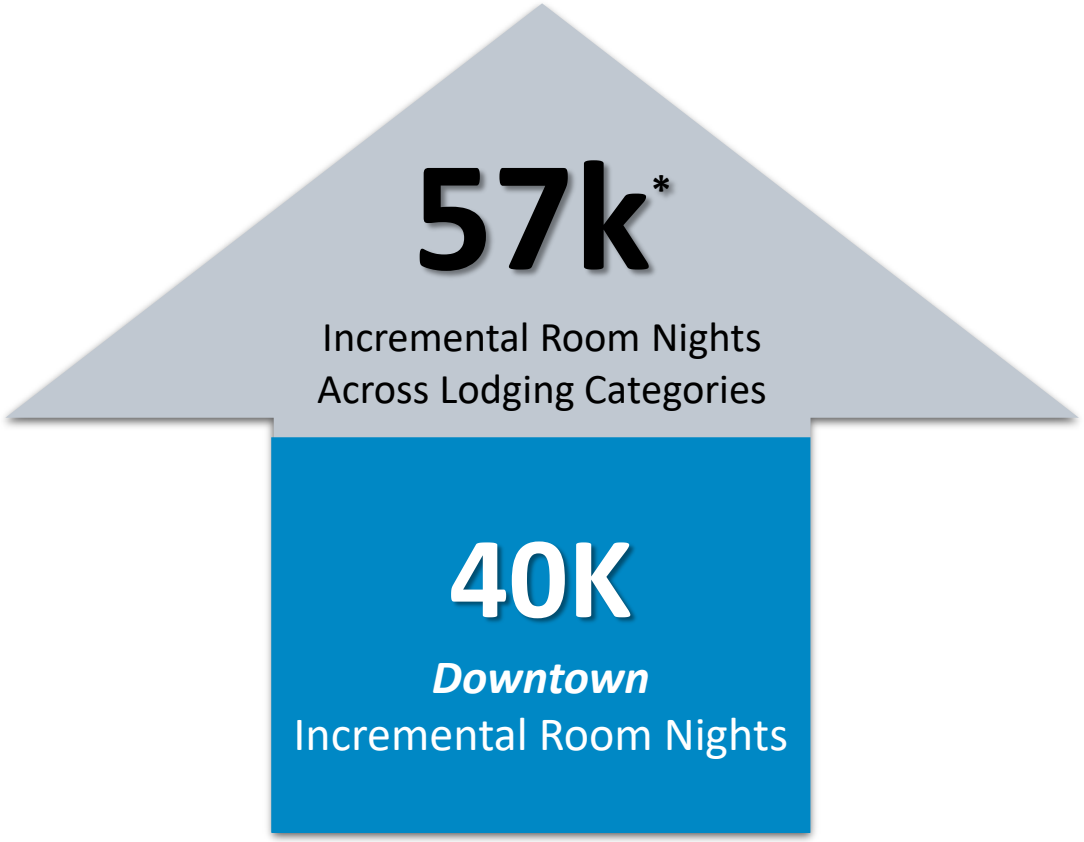
Return on Investment

Gross Return on Investment for the In-State Campaign was $63 while net investments (less media commissions) was $71.

A lack of incremental visitation in two markets meant no return here; however, the three markets with incremental visitation carried the campaign. Orlando was especially lucrative with a return of $151 for every dollar invested.

Market	Incremental Spending	Investment	GROSS Return on Investment
Orlando	$16.1M	$107,204	$151
Miami	-	$121,374	$0
Fort Myers	$4.0M	$39,041	$101
West Palm Beach	-	$73,677	$0
Jacksonville	$5.4M	$61,023	$88
Gross Return	**$25.5M**	**$402,319**	**$63**
Net Return	**$25.5M**	**$356,664**	**$71**

Incremental Room Nights



**The In-State Campaign generated more than 107k incremental room nights for the entire Greater Tampa Bay area. Of those, 57k were overnight stays in Hillsborough County. Of those, 70% or 40k stayed in a downtown hotel.*

The In-State Marketing Campaign generated more than 57k 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.

Of the 57k incremental Hillsborough County room nights, 40k were generated among one of 14 downtown hotels, while the remainder were generated from other hotels in the county.

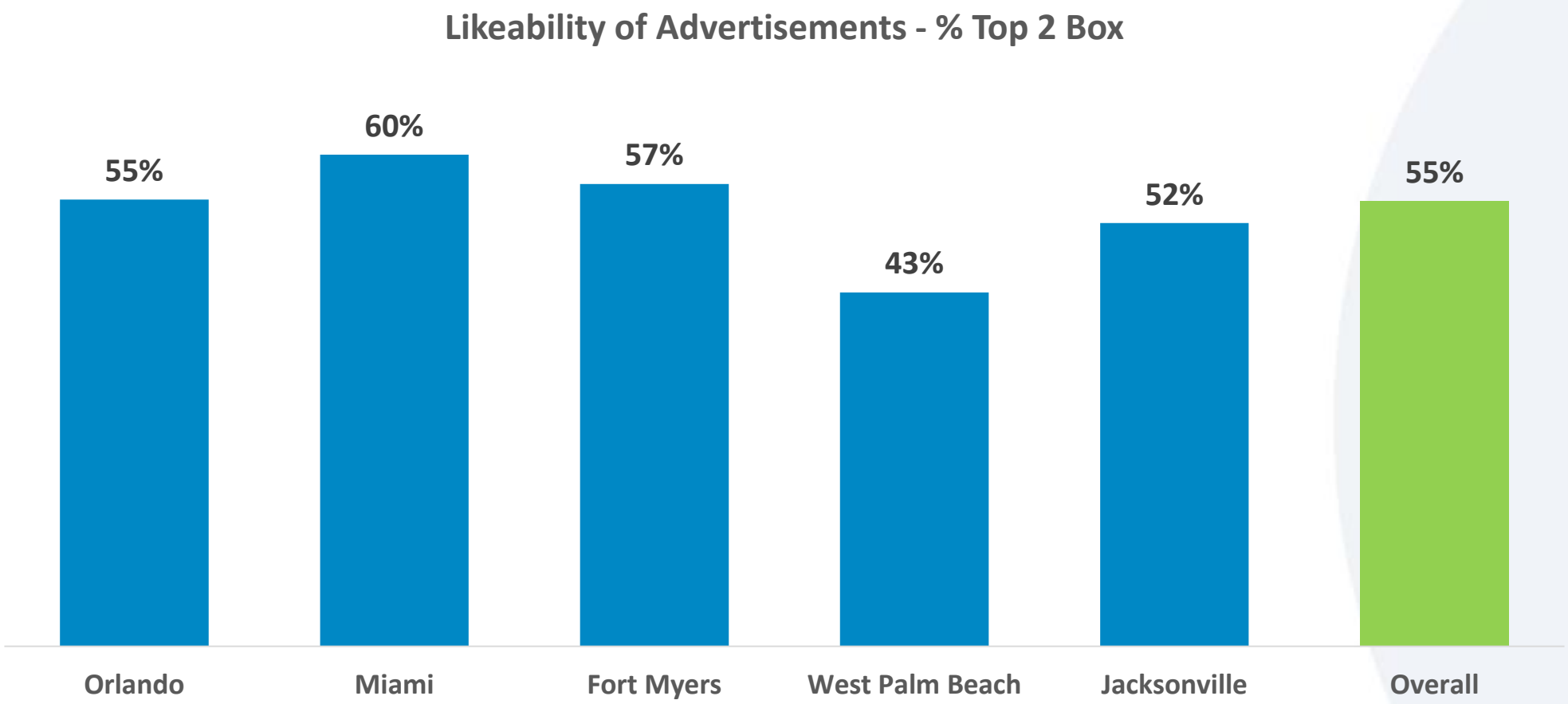
RESPONDENT BASE: OVERNIGHT VISITORS WHO STAYED IN HILLSBOROUGH COUNTY | N=290
OVERNIGHT VISITORS WHO STAYED IN HILLSBOROUGH COUNTY IN A DOWNTOWN HOTEL | N=249

Advertising Evaluation

+ *Ratings of creative appeal*
+ *Impact on consumer behavior*
+ *Marketing messages' impact on intent to visit*

03

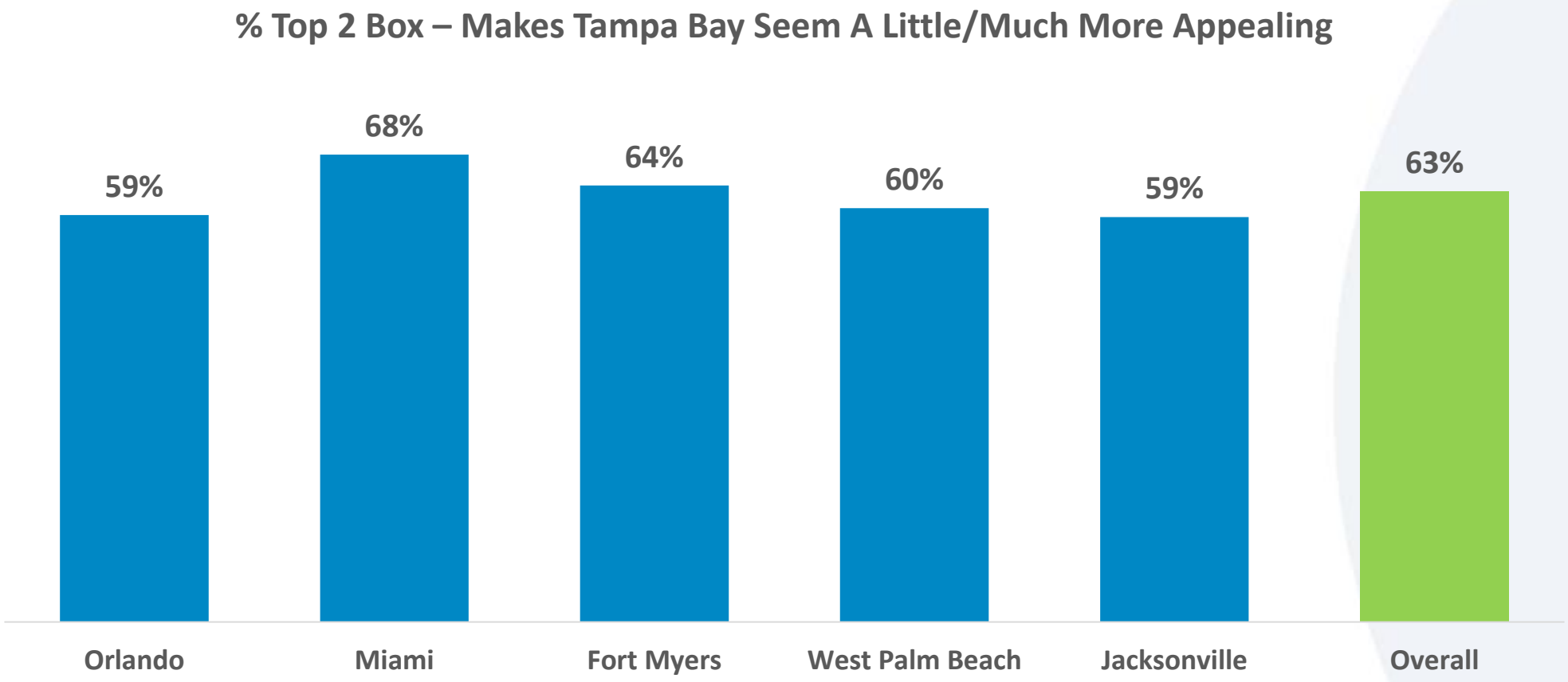
More than half of travelers indicated they liked the advertising collection, with those from Miami finding them most appealing.



Q29: Using the scale provided, please rate how much you like this collection of advertisements for Tampa Bay.

RESPONDENT BASE: ALL RESPONDENTS | N=1,205

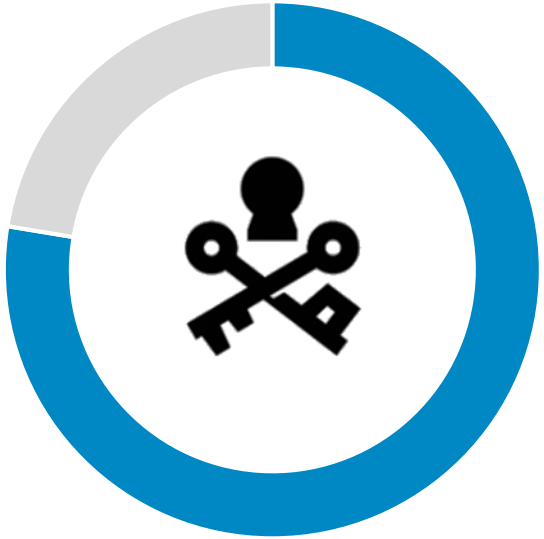
Additionally, the ads' impact on the appeal of Tampa Bay was also high—particularly in Miami.



Q30: Using the scale provided, please indicate the degree to which these ads make Tampa Bay seem more appealing to you.

RESPONDENT BASE: ALL RESPONDENTS | N=1,205

Travelers believed the ads were relevant, fairly differentiated and fit the Tampa brand very well.



78%

Fits Brand Somewhat/Very Well

47%

Pretty/ Much Different

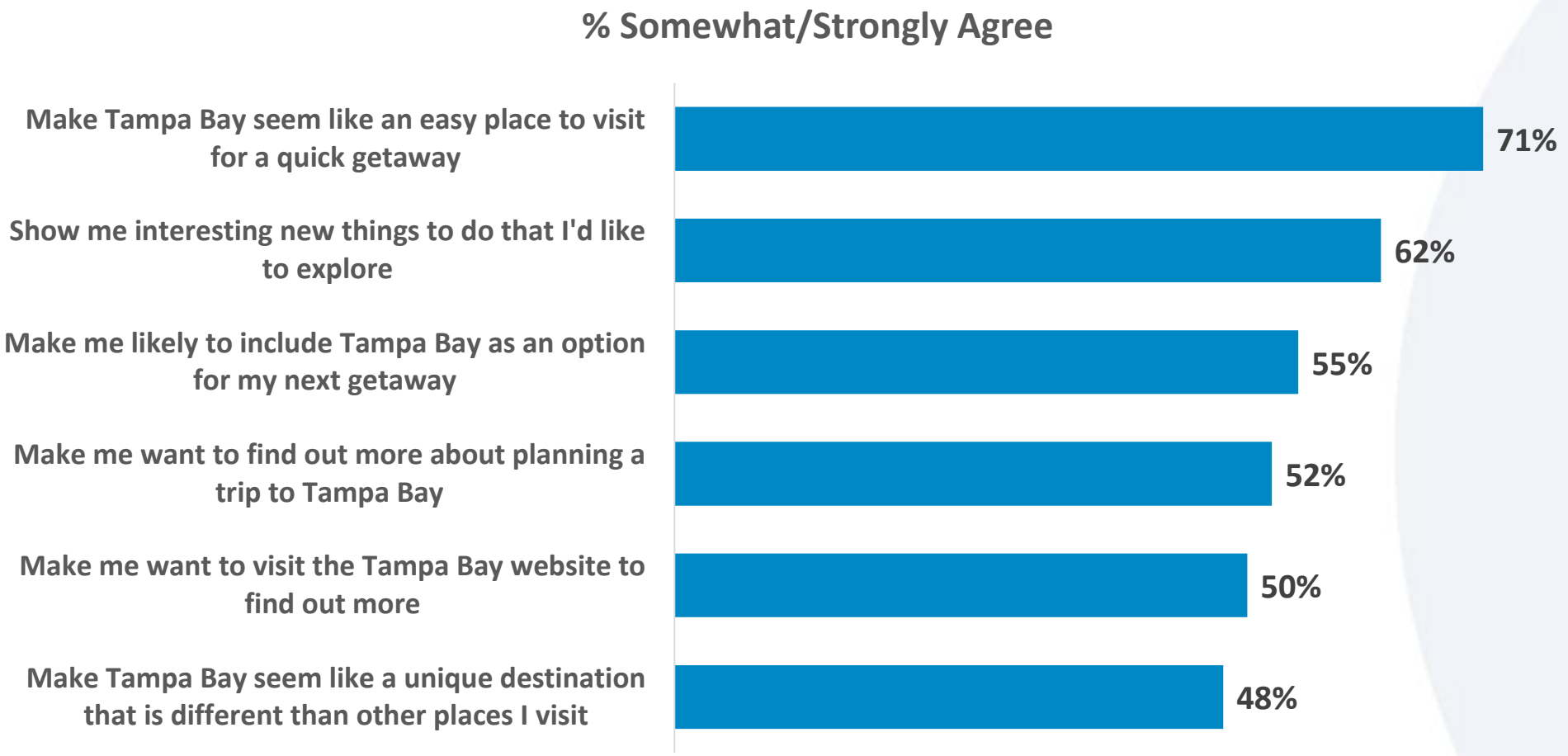
56%

Somewhat/ Very Relevant

Q31: Using the scale provided, please rate how relevant the points made in these advertisements are to you.
Q32: Using the scale provided, please rate how well this advertisement fit with what you think about Tampa.
Q33: Using the scale provided, please indicate how different this advertisement is from other advertising you've seen for destinations.

RESPONDENT BASE: ALL RESPONDENTS | N=1,205

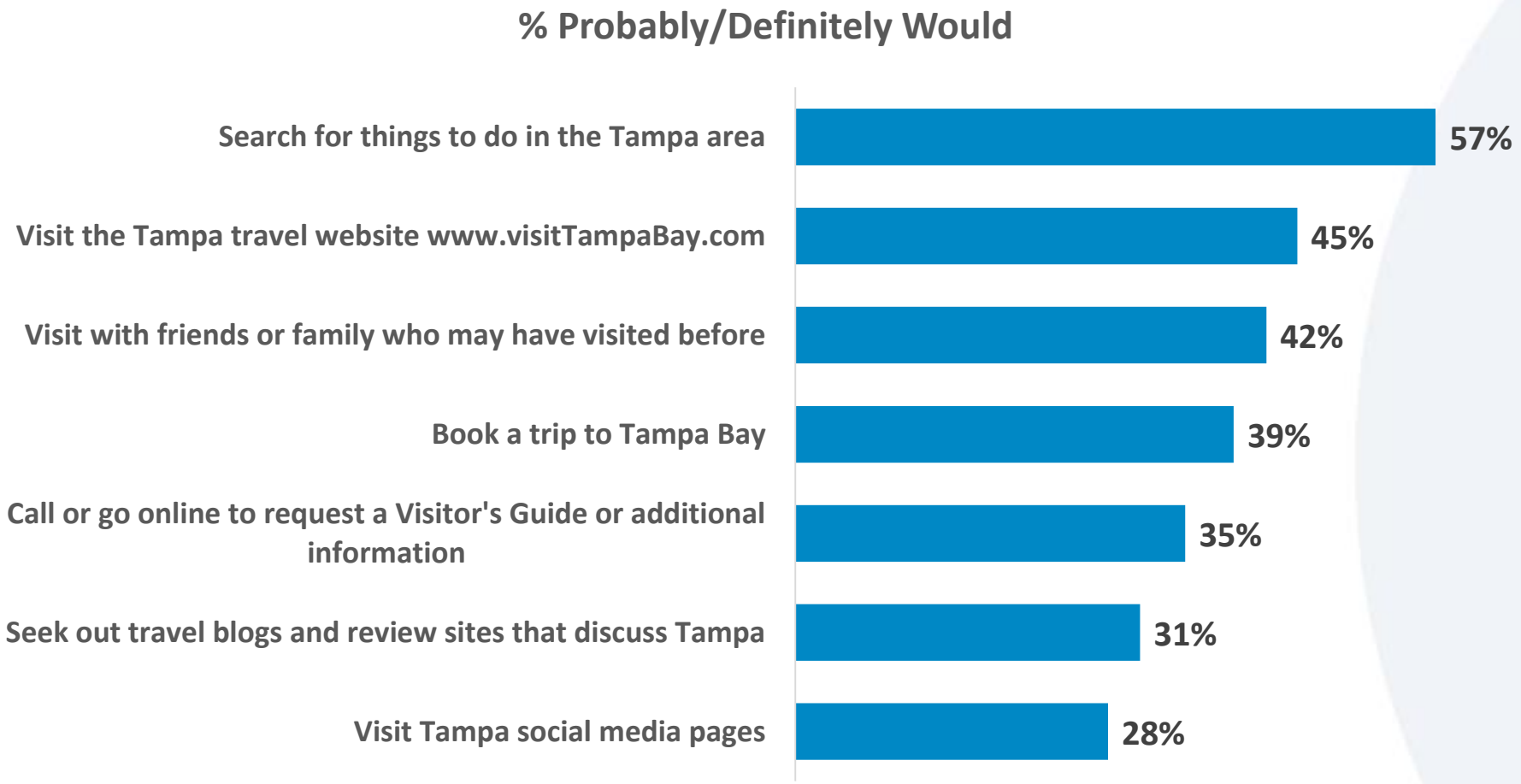
More than 7 in 10 travelers agree that the ads make Tampa seem like an easy place to visit and has interesting things to explore.



Q34: 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=1,205

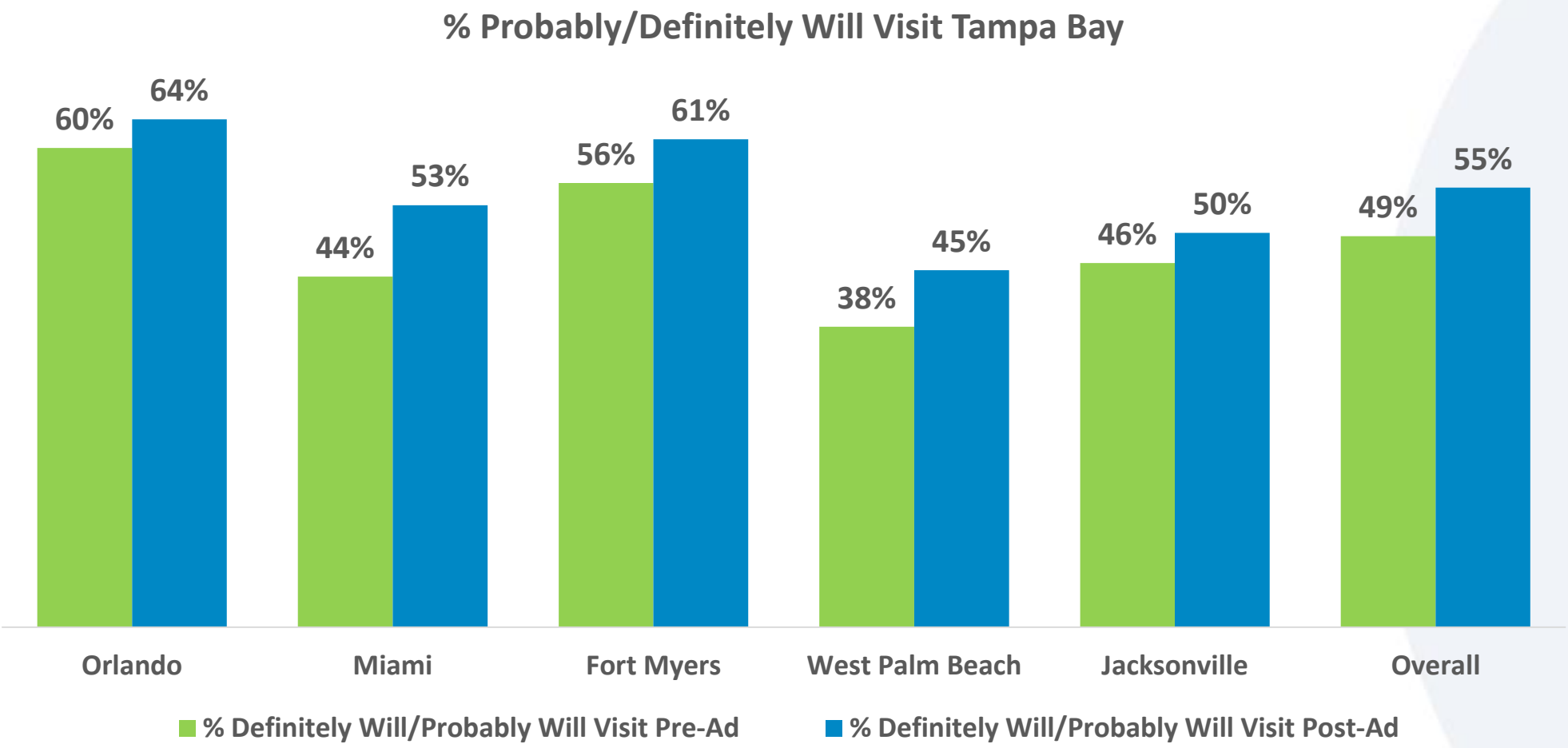
Additionally, more than half of travelers would search for things to do in the Tampa area after seeing the ads.



Q35: After reviewing these ads, how likely would you be to take each of the following actions?

RESPONDENT BASE: ALL RESPONDENTS | N=1,205

Intent to visit increased in every market after seeing the advertisements.



Q8: Using the scale provided, please indicate how likely you are to visit each of the following destinations in the next 12 months.
Q36: Using the scale provided, please indicate how likely you are to visit the Tampa area in the next 12 months?

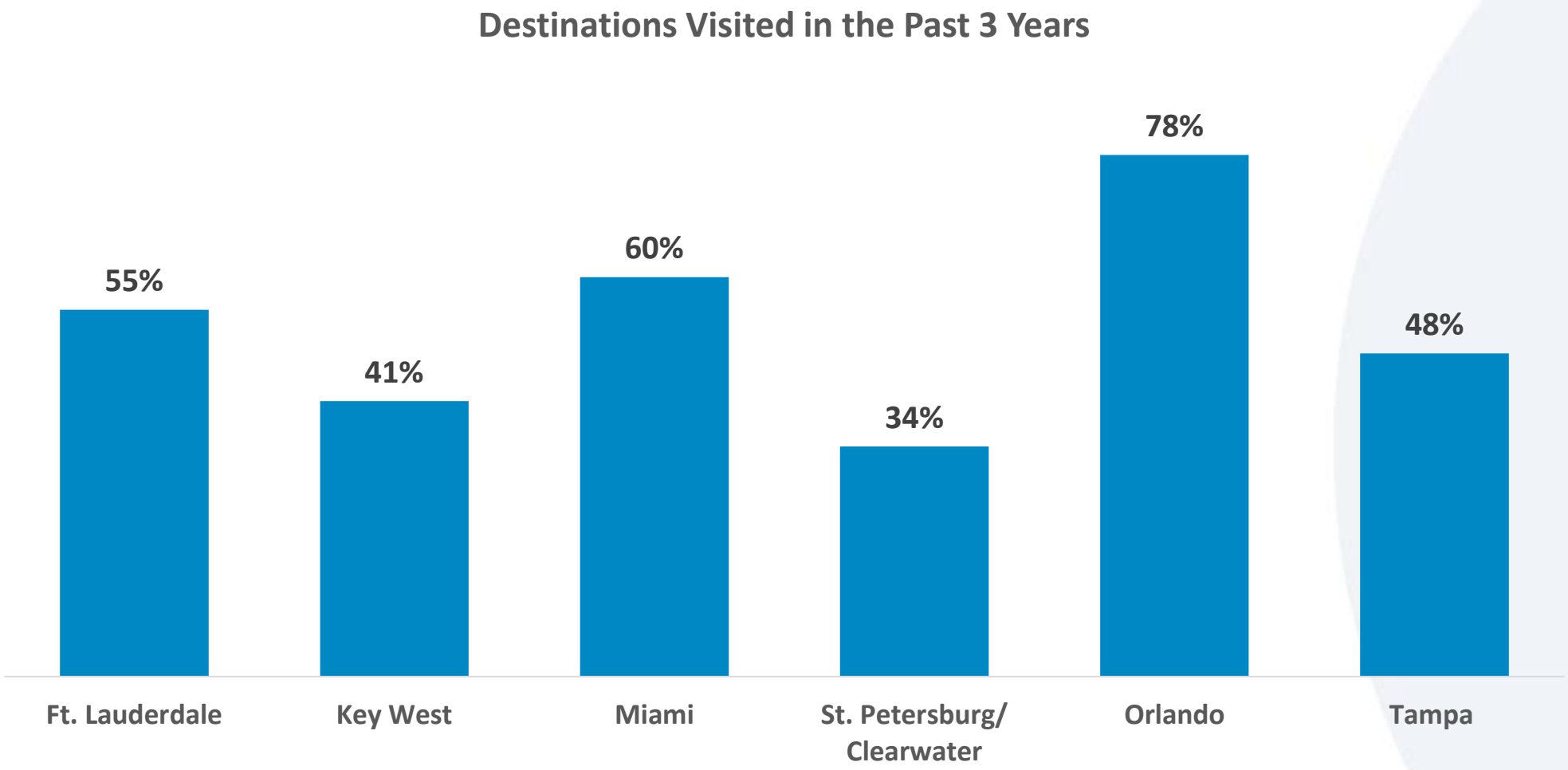
RESPONDENT BASE: ALL RESPONDENTS | N=1,205

Travel Landscape

+ *Competitive travel landscape*
+ *Making travel plans*

04

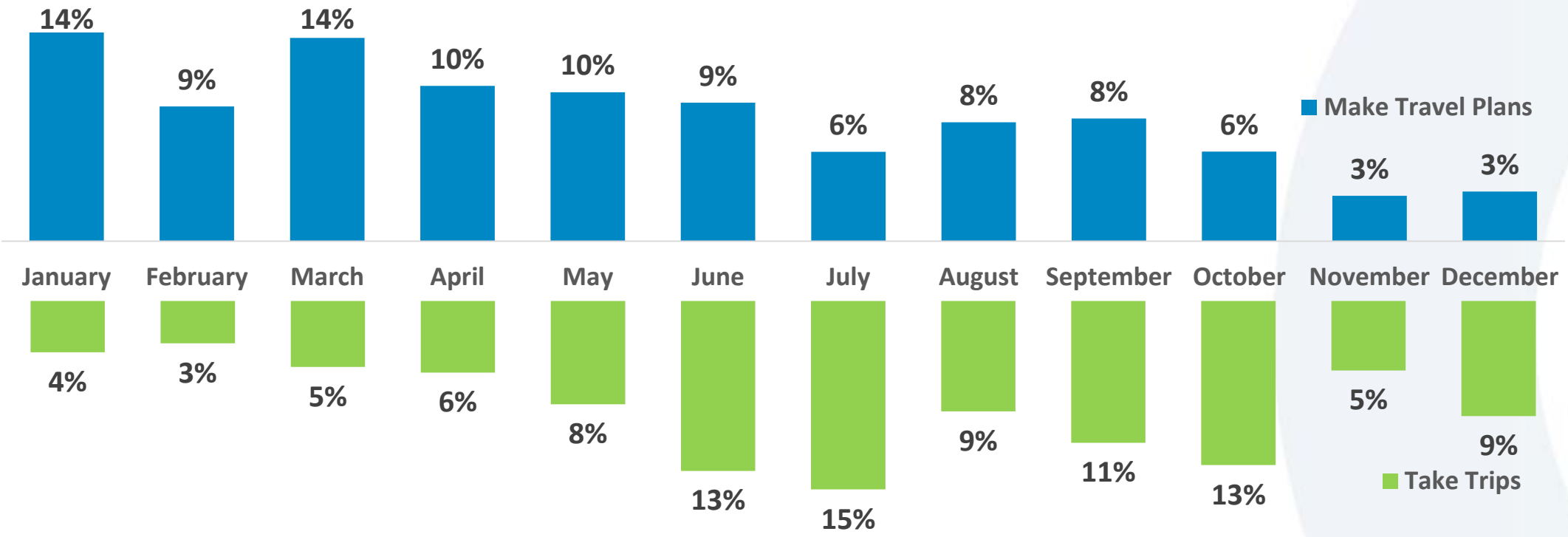
Once again, travelers in the target markets were most likely visiting Orlando in the past three years, followed by Miami.



Q7: Please indicate which of these destinations, if any, you have visited in the past 3 years.

RESPONDENT BASE: ALL RESPONDENTS | N=1,205

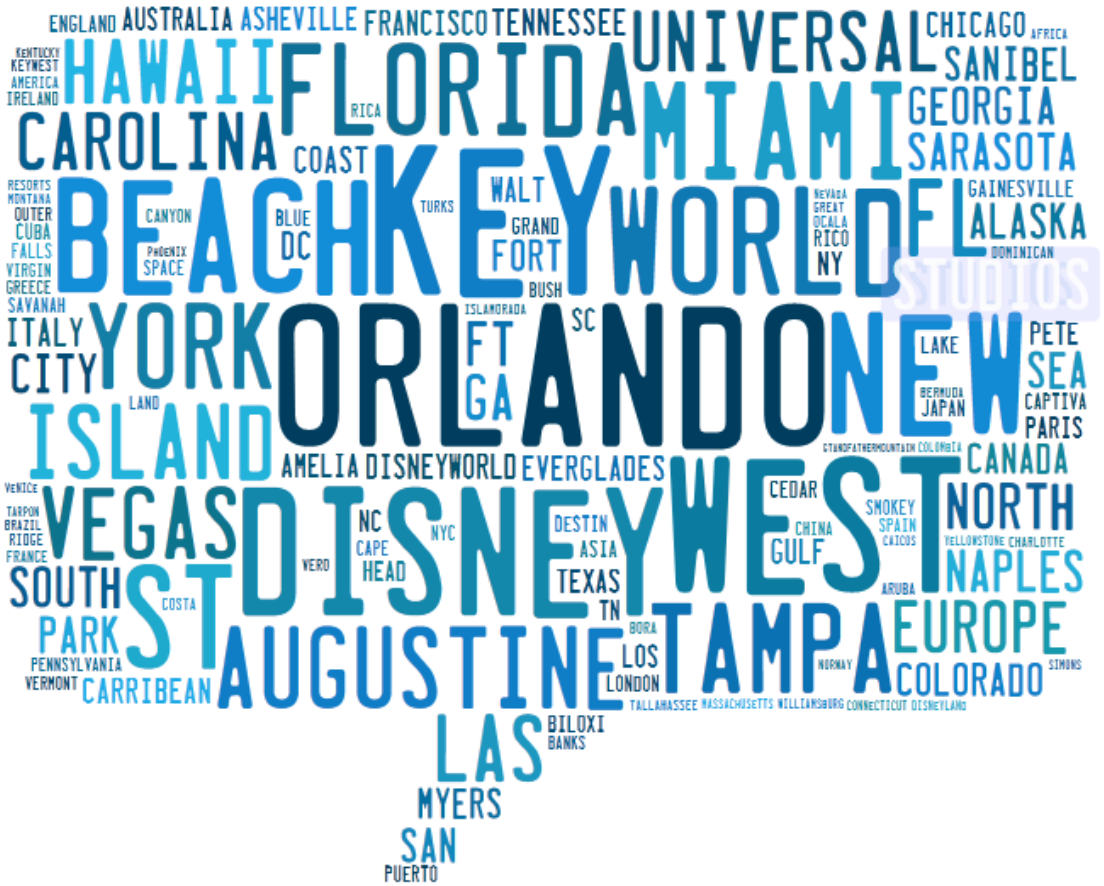
Overall, travelers in the target markets are most likely to make their travel plans in January-March and travel in June, July and October, similar to past summer travel.



Q6: What time of year do you generally make your leisure travel plans and then travel for leisure?

RESPONDENT BASE: ALL RESPONDENTS | N=1,205

Top of mind awareness for Tampa stands at 9% - up 2 places in the ranking compared to last summer.



Rank	Destination	Awareness
1	Orlando	22.8%
2	Key West	16.6%
3	Disney	14.6%
4	Miami	9.9%
5	Tampa	9.0%
6	Savannah	5.5%

Q5: 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=1,205

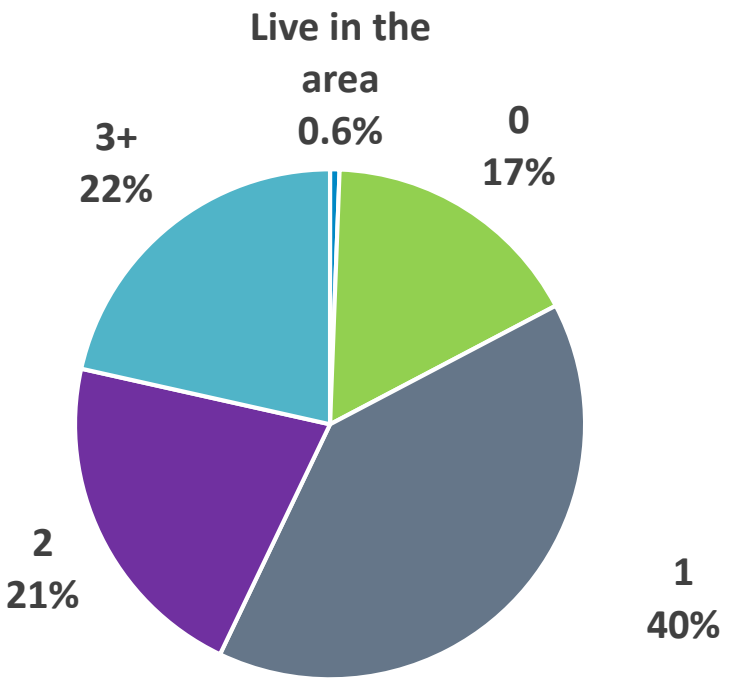
Tampa Bay Visitor Profile

+ *Tampa Bay traveler behavior*
+ *Activity participation and functional drivers*
+ *Accommodations, length of stay and more*
+ *Tampa Bay visitors' demographic profile*

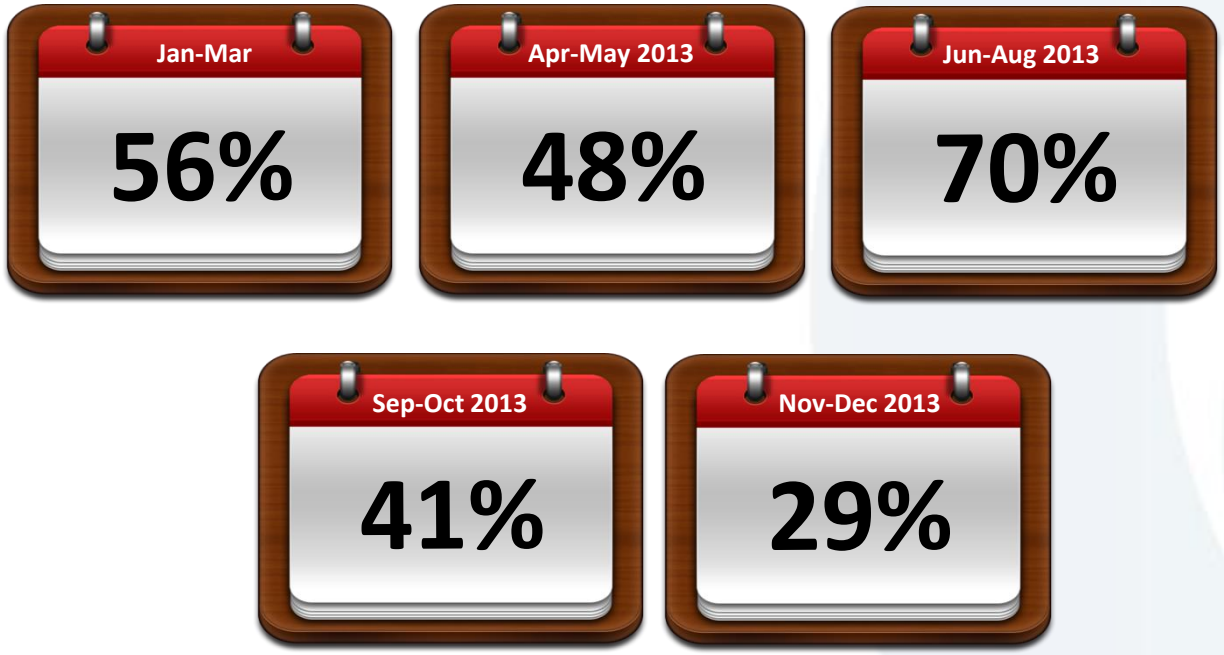
05

The summer campaign drove visitation to the months of June, July and August.

Number of Trips in Past 12 Months – 1.9



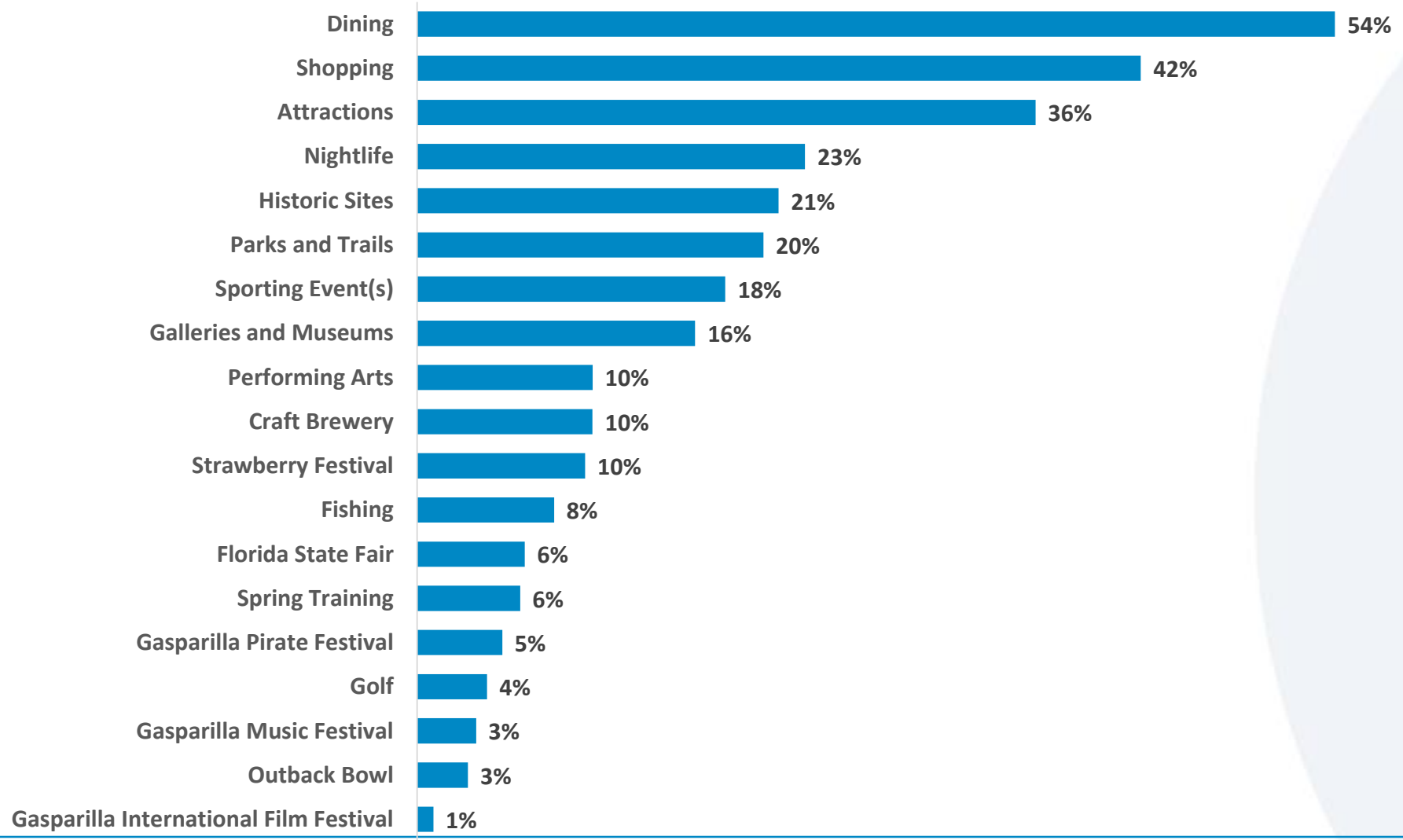
Months Visited Tampa Bay in the Past 3 Years



Q11: In the past 3 years, which months have you visited Tampa?
Q12: How many trips did you make to the Tampa area in the past 12 months?

RESPONDENT BASE: TAMPA BAY VISITORS PAST 3 YEARS | N=599

Other than dining and shopping that are popular in all destinations, attractions and nightlife are also very popular in Tampa.



Q13: Which of the following activities or experiences, if any, did you participate in on your most recent visit to the Tampa area?

RESPONDENT BASE: TAMPA BAY VISITORS PAST 3 YEARS | N=599

Along with attractions, shopping and dining, sporting events also drive travelers to visit the Tampa area.

Functional Drivers of Visitation

Attractions

25%

Dining

24%

Shopping

19%

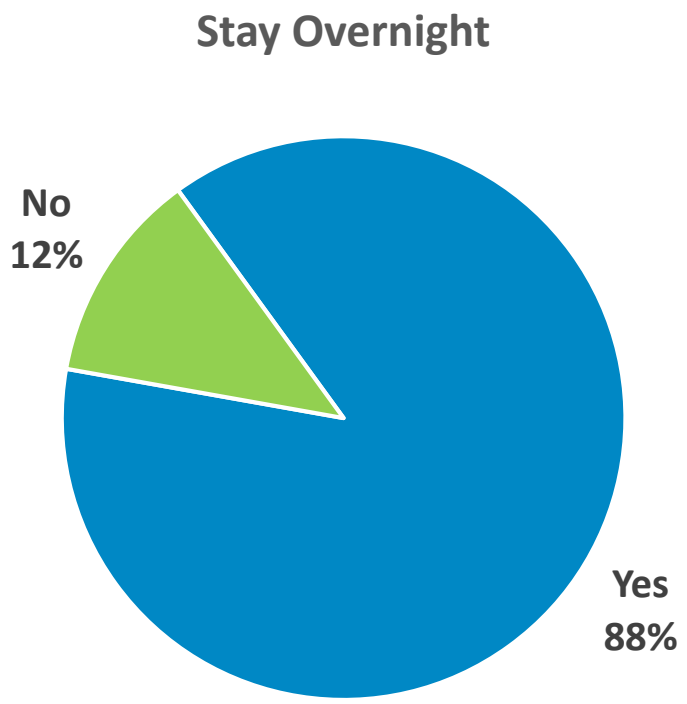
Sporting Events

13%

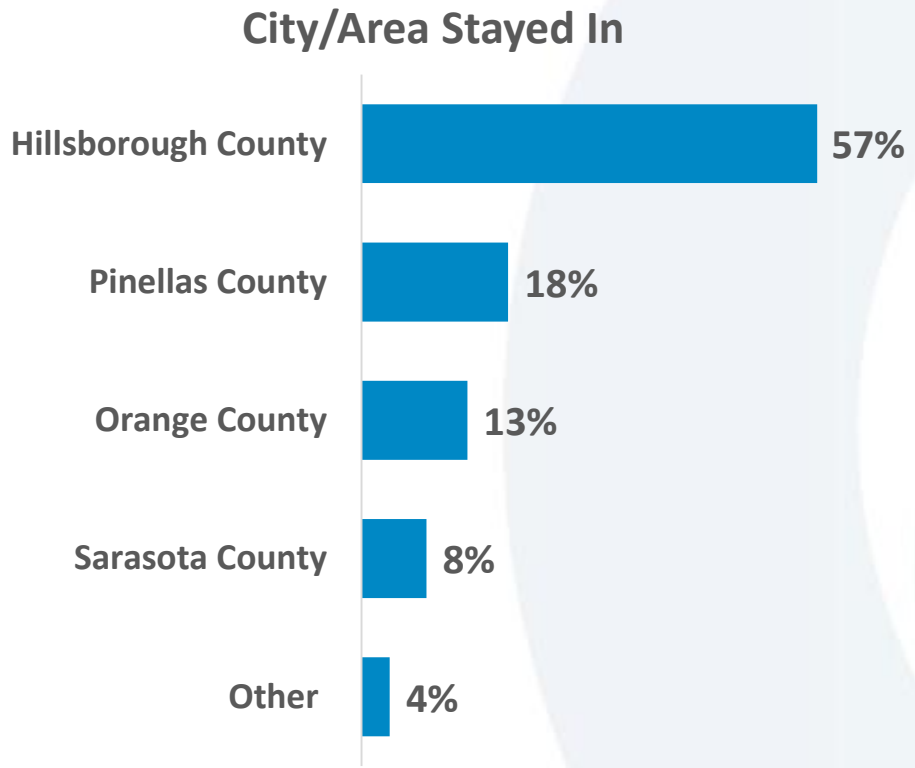
Q14: Of these activities, please indicate if there were any that were a major influence in your decision to visit Tampa on this most recent trip.

RESPONDENT BASE: VISITORS WHO PARTICIPATED IN ACTIVITIES | N=546

Nearly 9 in 10 Tampa Bay visitors spent the night on their last visit to the area and more than half chose to stay in Hillsborough County.



2.6
Nights in the Area

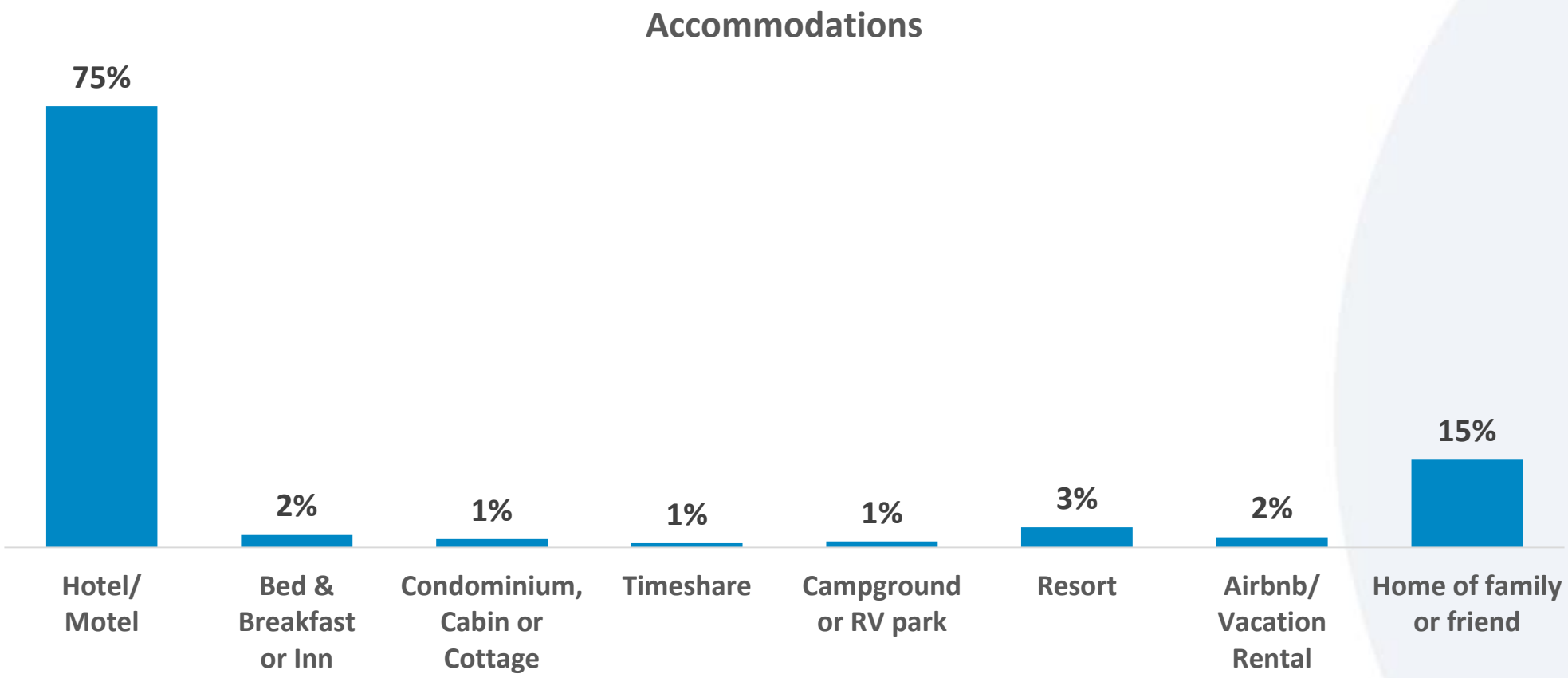


RESPONDENT BASE: TAMPA BAY VISITORS LAST 3 YEARS | N=599

RESPONDENT BASE: ALL OVERNIGHT VISITORS | N=510

Q16: How many nights did you spend in the area on this trip?
Q17: In which of the following cities/areas did you spend the night on your most recent visit to the Tampa area?

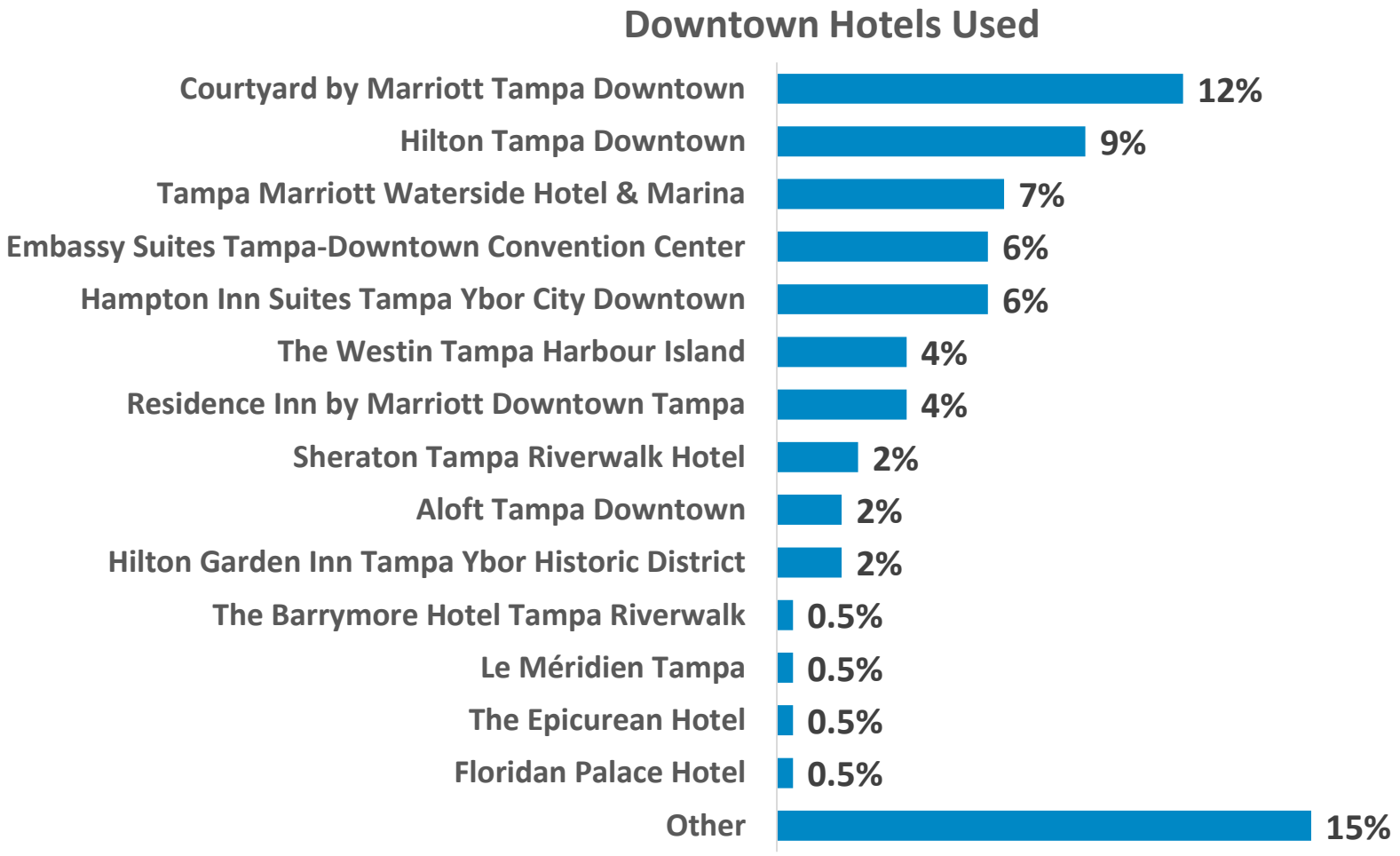
Paid accommodations are most popular for overnight visitors.



Q18: Which of the following best describes the type of accommodations you used on your most recent trip?

RESPONDENT BASE: OVERNIGHT VISITORS WHO STAYED IN TAMPA | N=290

The Courtyard by Marriot and Hilton were the most popular downtown hotels mentioned.

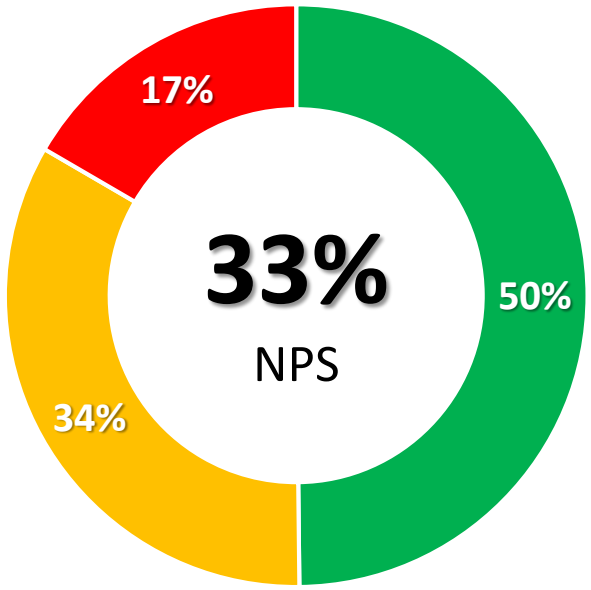


- Best Western
- Days Inn
- Hampton Inn
- La Quinta
- Springhill Suites

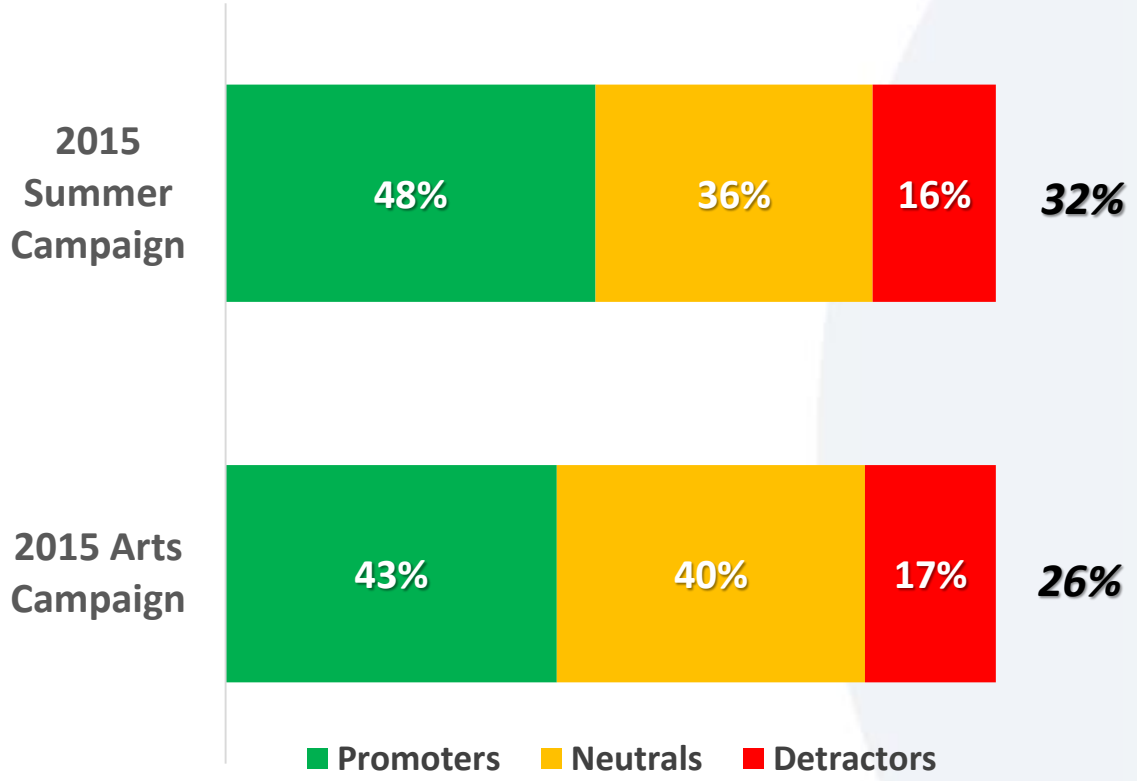
Q18: Which of the following downtown hotels, if any, did you use for your overnight accommodations in Tampa in your most recent visit?

RESPONDENT BASE: OVERNIGHT VISITORS WHO STAYED IN TAMPA IN A HOTEL | N=216

Half of Tampa Bay visitors are promoting the area higher than both the Arts & Culture and Summer campaigns last year.



■ Promoters (9-10) ■ Neutrals (7-8) ■ Detractors (0-6)



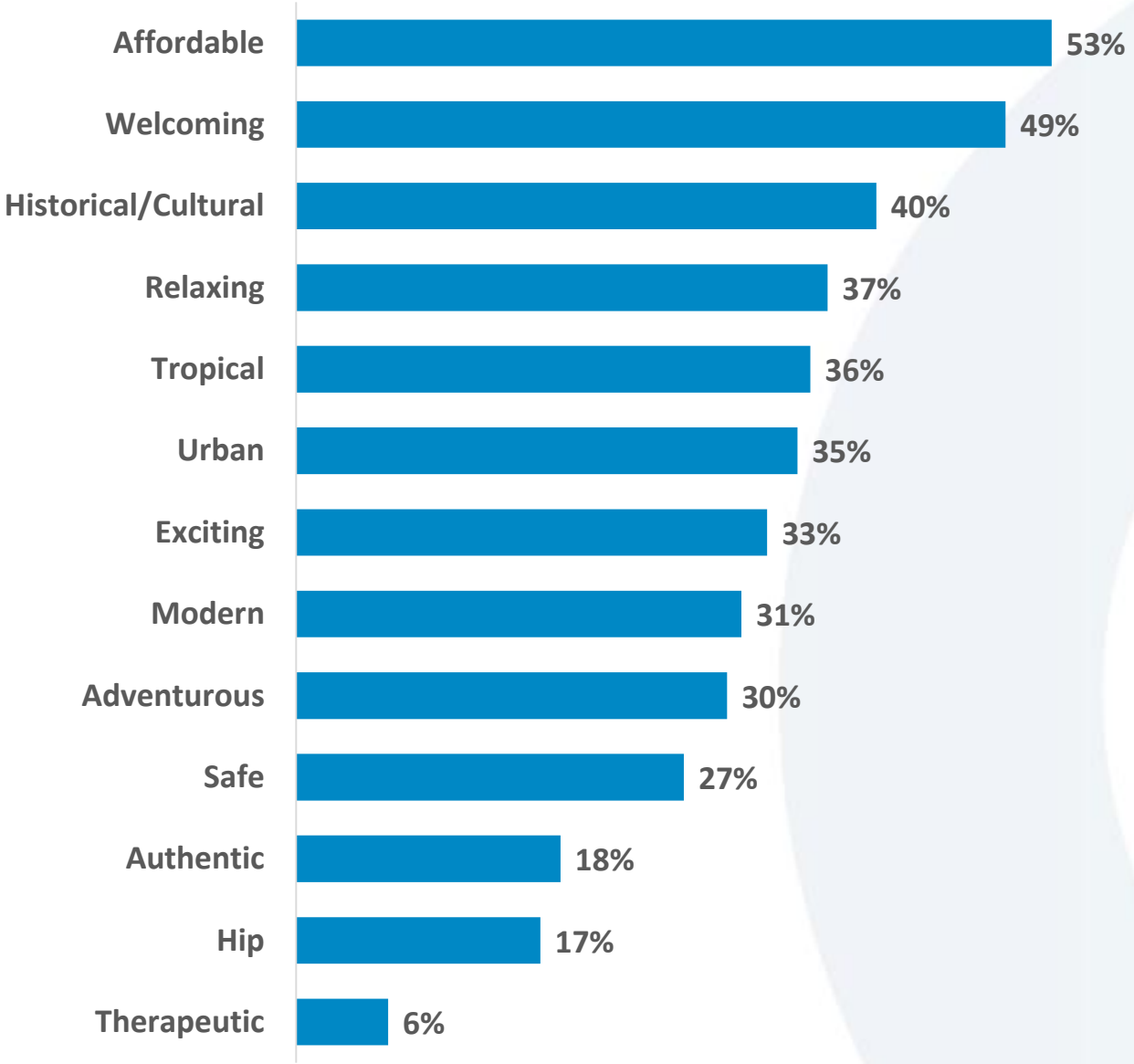
Q21: How likely are you to recommend the Tampa area to a friend or family member?

RESPONDENT BASE: TAMPA BAY VISITORS SINCE MAY 2016 | N=289

Tampa Bay Characteristics

Tampa Bay visitors use positive words to describe the area. Affordability and the welcoming environment are the two strongest characteristics.

Very few visitors would use the words therapeutic, hip or authentic to describe the area.



Q10: Please indicate which of the following characteristics you believe best describe the city of Tampa.

RESPONDENT BASE: TAMPA BAY VISITORS PAST 3 YEARS | N=599

Tampa Bay's Brand Advocates are more likely to have children, earn higher household incomes and live slightly farther away.

	Visitors Since May 2016	Prospects*	Brand Advocates**
Respondent Age	46	47	47
Children in the Home	31%	33%	33%
No Children	69%	67%	67%
Males	45%	41%	38%
Females	55%	59%	62%
HH Income	$84.7k	$78.1k	$87.3k
Distance	127 miles	138 miles	132 miles
% College Graduate +	57%	55%	56%

**Prospects are non-visitors 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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Reveal Your Customer's Full Experience