

VISIT



**TAMPA BAY**

TREASURE AWAITS

# 2016 Out of State Campaign Marketing & Media Effectiveness

*Prepared by*



# Project Overview

## **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 Industry Norms for context.

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## **TARGET AUDIENCE**

The Tampa Bay Out of State Marketing & Media Effectiveness study was conducted among travelers living in select feeder markets: Boston, Chicago, Detroit, and Dallas. The research was conducted in June of 2016 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.

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## **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 +/-5.7% per individual market (sample size per market=approximately 300).

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# Executive Summary

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## Market Reach & Incremental Impact

- After the 2015 Out of State Campaign, Tampa Bay's goal was to balance media investments in order to generate more revenue at a lower cost. The 2016 campaign did just that, while also producing a higher return.
- With a more targeted campaign in just four markets, Tampa Bay generated a significant increase in overall ad awareness which reached 38.0%—20.5% higher than what was recorded in 2015. Extrapolated across the population of traveler households, this equates to approximately 3.0 million aware households across Tampa's target markets.
- The campaign generated 1.6% incremental visitation, or 47.2k more household visits than would have occurred without the campaign. And, the average traveler party spent \$956 on their most recent trip to Tampa Bay. This means that incremental spending in the area totaled more than \$45 million—a 17% increase over the 2015 campaign (total) and a 36% increase from travelers in these same markets last year.



## Marketing Efficiency & Return

- With a gross media investment of nearly \$571k (-23% compared to 2015 overall) in the Out of State Campaign, Tampa Bay's cost per aware household averaged just \$0.19 overall. This cost is down 42% from 2015's overall campaign and down 41% from the same markets last year.
- The net media investment (less media commissions) of \$485k followed the same trend, generating a cost per aware household of just \$0.16 (down from \$0.28 last year).
- Tampa Bay's Out of State Marketing Campaign generated a Gross ROI of \$79 and a Net ROI of \$93. The return in both cases was 51% higher than the overall campaign in 2015 and 22% higher than the ROI generated from the same four markets last year.
- The overall marketing campaign also generated ratings higher than Tampa Bay's historical average for every metric measured.



## Advertising Evaluation

- More than half (56%) of travelers in this year's markets found the advertisements appealing. Detroit travelers found the ads most appealing (60%) while Boston travelers rated them the lowest (50%). Nearly two-thirds (65%) of all travelers indicated the ads made Tampa Bay seem more appealing as a travel destination.
- Additionally, the ads were relevant (62%), fit the brand well (80%) and were differentiated from other destinations' ads (47%). In fact, all three of these ratings surpassed the H2R Industry Norm for their respective metrics.
- The ads also had a positive impact on intent to visit the area in the next 12 months, which increased 6.6 percentage points overall after travelers were exposed to the ads.



## Additional Insights

- **Brand Promoters.** An additional goal for decision makers was to increase the number of Brand Promoters for Tampa Bay—and that was also successful. The number of Brand Promoters increased significantly this year and provided for a record-breaking NPS of 34%. The increase in promoters was fueled by a decrease in both the number of neutrals (-8%) and the number of detractors (-4%). This increase will aid decision makers in leveraging the market buzz generated from unsolicited recommendations.
- **Watching Boston.** The 2016 Out of State Campaign was excellent, generating metrics well above average and above H2R's Industry Norms. However, the Boston DMA struggled in many areas, including ad appeal, relevance, brand fit and differentiation. And, with a larger investment, the cost per aware household increased \$0.13 this year and the return on investment fell to \$15. While a one-year snapshot is too narrow to draw out long-term conclusions, the three-year decline in ROI for this market is a noteworthy development.





# Tampa Bay Out of State Campaign

## Key Performance Indicators (KPI) Summary

Tampa Bay’s 2016 Out of State Marketing Campaign generated a Gross ROI of \$79, while spending without media commissions produced a Net ROI of \$93.

These returns are significantly higher than 2015’s results, and they also surpass the norm for destinations with similar marketing budgets.

Overall, the marketing message reached a total of 3.0M million traveler households at a gross cost of \$0.19 (net \$0.16) per household. These measurements all improved from 2015, and the costs per household were significantly better than the H2R Industry Norm of \$0.36.

Key Performance Indicator	Gross Spending	Net Spending*	H2R Industry Norm**
Aware Households	3.0M	3.0M	1.3M
Incremental Visitation	+1.6%	+1.6%	+4.2%
Incremental Trips	47.2k	47.2k	37.8k
Incremental Revenue	\$45.2M	\$45.2M	\$21.9M
Media Investment	\$571k	\$485k	\$301k
Cost/Aware Household	\$0.19	\$0.16	\$0.36
Return on Investment	\$79	\$93	\$87

\*Net Spending does not include Media Commissions paid for the Out of State Marketing Campaign.

\*\*Paid Media Norm for destinations with marketing budgets <\$750k.

# Tampa Bay Out of State Campaign – Gross Media Trends

Tampa Bay’s Gross Spending on paid media for the 2016 Out of State Campaign was quite successful – better than every metric in 2015, as well as the historical averages.

Tampa Bay invested \$166.2k fewer dollars into this year’s marketing campaign and still generated a Gross ROI of \$79—\$27 higher than 2015. Additionally, the cost per aware household decreased by \$0.14 this year. All of this combined led to the highest number of incremental trips generated in three years.

Gross Paid Media Spending	Out of State 2015	Out of State 2016	Tampa Historical Average*
Aware Households	2.2M	3.0M	2.8M
Incremental Visitation	+1.4%	+1.6%	+1.3%
Incremental Trips	31.5k	47.2k	36.6k
Incremental Revenue	\$38.6M	\$45.2M	\$37.8k
Media Investment	\$737k	\$571k	\$592k
Cost/Aware Household	\$0.33	\$0.19	\$0.23
Return on Investment	\$52	\$79	\$65

\*The Tampa Historical Average is a simple average of all data for Out of State Campaigns since 2014.

# Tampa Bay Out of State Campaign – Net Media Trends

The net investment (minus media commissions) in the 2016 Out of State Campaign produced the same trends as gross spending.

It was a record setting campaign for Visit Tampa Bay, with the highest incremental visitation, incremental revenue and return on investment measured in the past three years.

Net Paid Media Spending	Out of State 2015	Out of State 2016	Tampa Historical Average
Aware Households	2.2M	3.0M	2.8M
Incremental Visitation	+1.4%	+1.6%	+1.3%
Incremental Trips	31.5k	47.2k	36.6k
Incremental Revenue	\$38.6M	\$45.2M	\$37.8k
Media Investment	\$625k	\$485k	\$505k
Cost/Aware Household	\$0.28	\$0.16	\$0.19
Return on Investment	\$62	\$93	\$76

# Marketing Efficiency

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

01

## MARKETING EFFICIENCY KPIs\*



**38%** of travelers saw or heard a Tampa Bay Out of State advertisement



Tampa Bay's Out of State Campaign reached **3.0 million** households

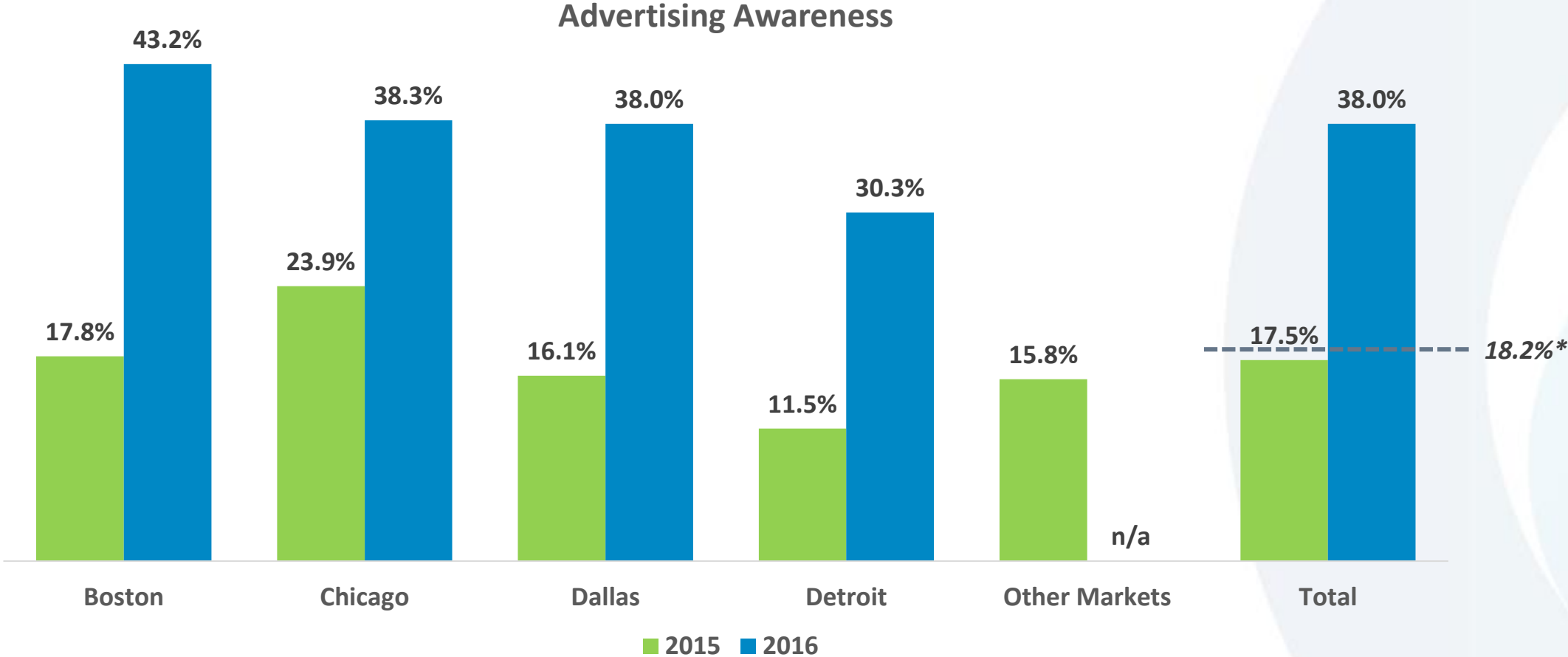


The gross cost per aware household averaged **\$0.19**



Tampa Bay invested **\$571k** in Gross Advertising for the Out of State Campaign

All four Out of State Campaign markets saw significant increases in advertising awareness this year, fueling an overall increase in awareness of more than 20%.



Q25-28: Have you seen this advertisement?

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

# Market Reach (Aware Traveler Households)

Tampa Bay's Out of State Marketing Campaign generated a market reach of 3.0 million traveler households, a 34% increase over last year's total market reach and an 88% increase over the same 4 markets measured last year.

Significant increases in reach were seen in every market this year, with a more than 100% increase in Boston (116%), Dallas (102%) and Detroit (138%) and a 51% increase in Chicago.

Market Reach	Out of State 2015	Out of State 2016	Tampa Historical Average
Boston	376k	811k	536k
Chicago	669k	1,009k	846k
Dallas	367k	743k	555k
Detroit	174k	414k	308k
Other Markets	633k	n/a	n/a
<b>Total Market</b>	<b>2.2M</b>	<b>3.0M</b>	<b>2.8M</b>
<i>Direct Comparison*</i>	<i>1.6M</i>	<i>3.0M</i>	<i>2.1M</i>

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

# Media Expenditures

With fewer advertised markets for the 2016 Out of State Campaign, expenditures in Boston and Detroit increased this year, while Dallas and Chicago decreased.

Net expenditures do not include media commissions.

Media Expenditures	2015 Spending	2016 Spending	Tampa Historical Average
Boston	\$42,074	\$195,221	\$99,184
Chicago	\$217,362	\$159,923	\$161,441
Dallas	\$212,760	\$112,654	\$162,707
Detroit	\$42,074	\$103,195	\$61,496
Other Markets	\$222,877	n/a	n/a
<b>Gross Spending</b>	<b>\$737,146</b>	<b>\$570,993</b>	<b>\$591,756</b>
<i>Gross Direct Comparison</i>	<i>\$514,269</i>	<i>\$570,993</i>	<i>\$430,592</i>
<b>Net Spending</b>	<b>\$625,074</b>	<b>\$485,344</b>	<b>\$504,667</b>
<i>Net Direct Comparison</i>	<i>\$437,829</i>	<i>\$485,344</i>	<i>\$366,887</i>



# GROSS Marketing Efficiency (Cost per Aware Household)

The Tampa Bay Out of State Marketing Campaign efficiently reached travelers in these target markets.

Tampa Bay spent 23% fewer marketing dollars on the 2016 Out of State Campaign compared to 2015. This decrease, combined with significant increases in awareness and market reach, dropped the cost per aware household to just \$0.19. This year saw a 42% decrease in cost per aware household compared to the total campaign in 2015 and a 41% decrease compared to the same four markets last year.

Gross Marketing Efficiency	Out of State 2015	Out of State 2016	Tampa Historical Average
Boston	\$0.11	\$0.24	\$0.17
Chicago	\$0.33	\$0.16	\$0.20
Dallas	\$0.58	\$0.15	\$0.37
Detroit	\$0.24	\$0.25	\$0.20
Other Markets	\$0.35	n/a	n/a
<b>Total Market</b>	<b>\$0.33</b>	<b>\$0.19</b>	<b>\$0.23</b>
<i>Direct Comparison</i>	<i>\$0.32</i>	<i>\$0.19</i>	<i>\$0.21</i>

## NET Marketing Efficiency (Cost per Aware Household)

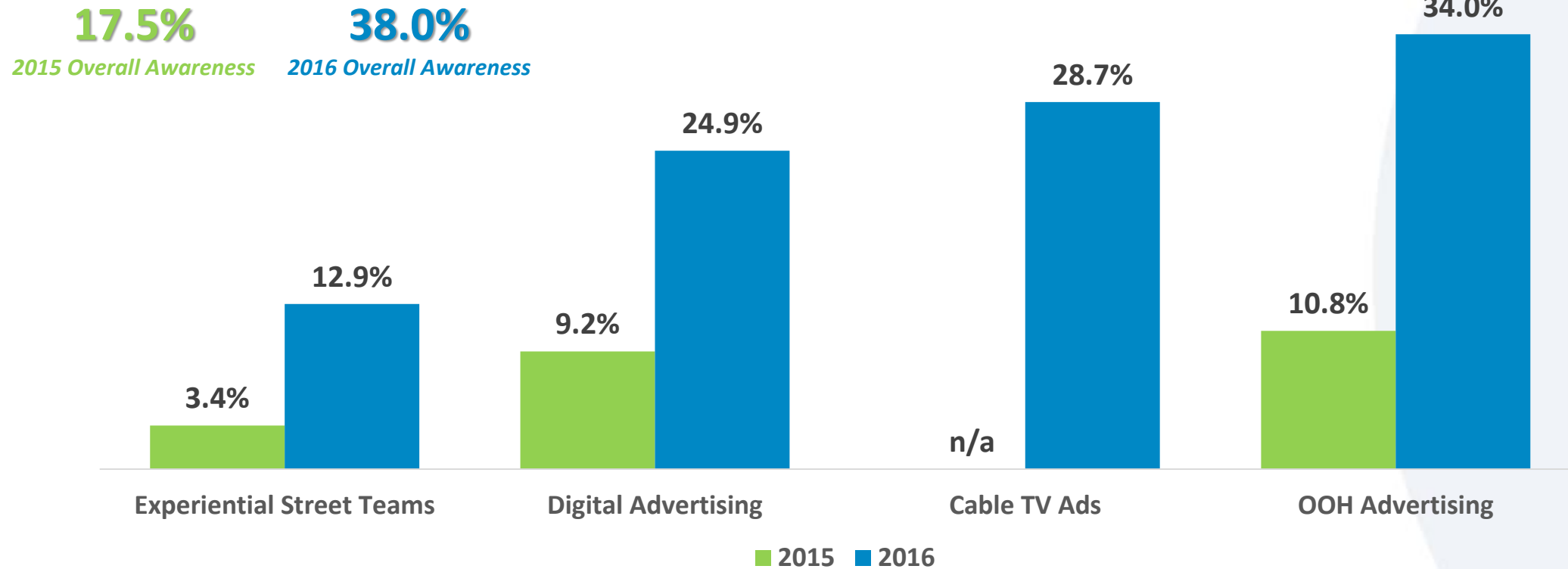
Tampa Bay's NET investments were also extremely efficient, averaging less than 2015's costs per aware household and below the historical average.

The NET cost per aware household was \$0.16—42% less than 2015's total campaign and 41% less than the 2015 campaign in the same markets.

Net Marketing Efficiency	Out of State 2015	Out of State 2016	Tampa Historical Average
Boston	\$0.10	\$0.20	\$0.14
Chicago	\$0.28	\$0.13	\$0.17
Dallas	\$0.49	\$0.13	\$0.31
Detroit	\$0.21	\$0.21	\$0.17
Other Markets	\$0.30	n/a	n/a
<b>Total Market</b>	<b>\$0.28</b>	<b>\$0.16</b>	<b>\$0.19</b>
<i>Direct Comparison</i>	<i>\$0.28</i>	<i>\$0.16</i>	<i>\$0.18</i>

While OOH advertising generated the highest ad awareness, digital advertising was available in all markets and therefore reached more households.

Advertising Awareness by Medium



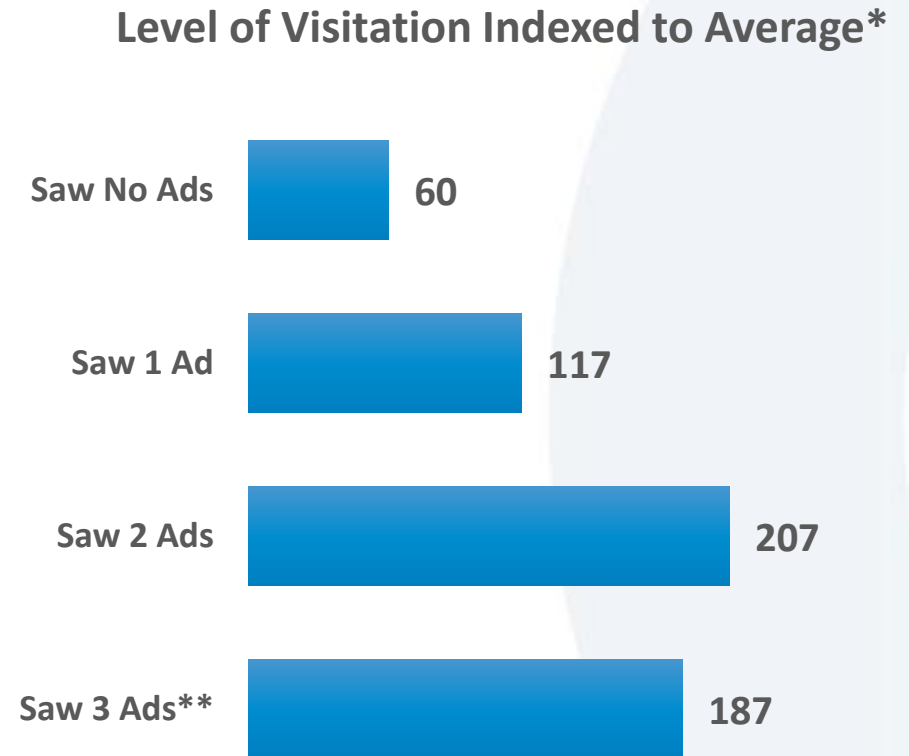
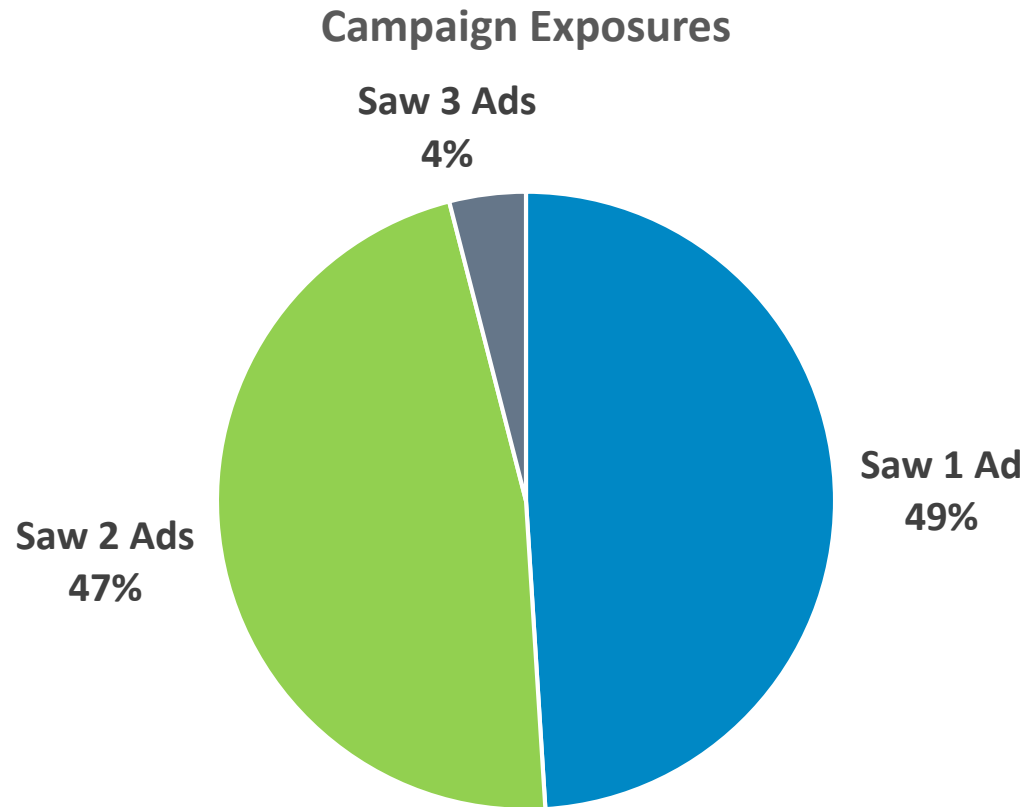
# Digital Advertising is Tampa’s Primary Reach Vehicle

Digital advertising efforts provided the primary reach vehicle(s) for Tampa Bay’s Out of State Marketing Campaign—generating the highest reach at the lowest cost.

In a close second to digital advertising, street teams cost only \$0.07 per aware household, a significant decrease in cost compared to the 2015 street teams. All forms of advertising were very efficient in 2016, coming in well below the H2R Industry Norm of \$0.36 for cost per aware household.

Medium	Out of State 2015 Reach	Out of State 2015 Cost/HH	Out of State 2016 Reach	Out of State 2016 Cost/HH
Street Teams	0.2M	\$0.29	0.2M	\$0.07
Digital Advertising	1.2M	\$0.17	2.0M	\$0.05
Cable TV	n/a	n/a	0.9M	\$0.21
OOH Advertising	0.8M	\$0.46	1.6M	\$0.17

With the exception of Boston, target markets were exposed to two advertisements. Those who saw or heard both advertisements were nearly twice as likely to visit as those who saw only one.



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.

\*\*This index is for directional purposes only; Boston was the only market with 3 ads.

# Incremental Impact

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

02

## MARKETING RETURN KPIs



Tampa Bay's Out of State Marketing Campaign resulted in **47.2k** incremental trips



**\$45.2 million** was generated in incremental travel spending



Incremental room nights totaled **107k**



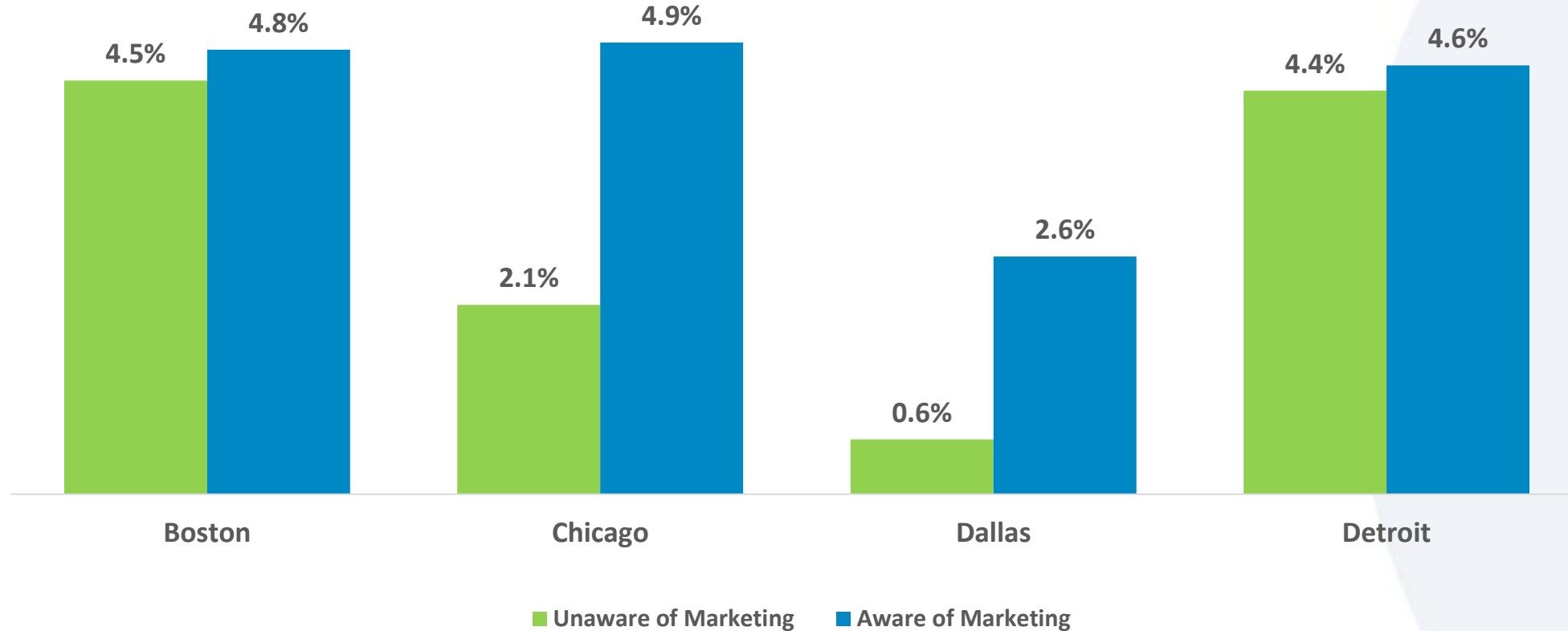
Tampa Bay invested **\$571k** in gross marketing expenditures



**Gross ROI was \$79**  
**Net ROI was \$93**

# Every market generated incremental visitation, with Chicago (+2.8%) generating the most.

Visitation – Aware vs. Unaware Households





# Incremental Visitation

Incremental visitation increased by 0.2 points compared to the total campaign in 2015; however this was a 0.1% decrease compared to the same markets' incremental visitation in 2015.

Chicago was the only market to see an increase in its percentage increment compared to last year (+0.7 points), while the three remaining markets saw slight declines.

% Increment	Out of State 2015	Out of State 2016	Tampa Historical Average
Boston	0.5%	0.3%	0.9%
Chicago	2.1%	2.8%	2.0%
Dallas	2.9%	2.0%	2.4%
Detroit	0.7%	0.3%	0.4%
Other Markets	0.6%	n/a	n/a
<b>Total Market</b>	<b>1.4%</b>	<b>1.6%</b>	<b>1.3%</b>
<i>Direct Comparison</i>	<i>1.7%</i>	<i>1.6%</i>	<i>1.5%</i>

# Incremental Household Visitation

Extrapolated across the number of aware households, however, incremental visitation increased in three of the four markets advertised.

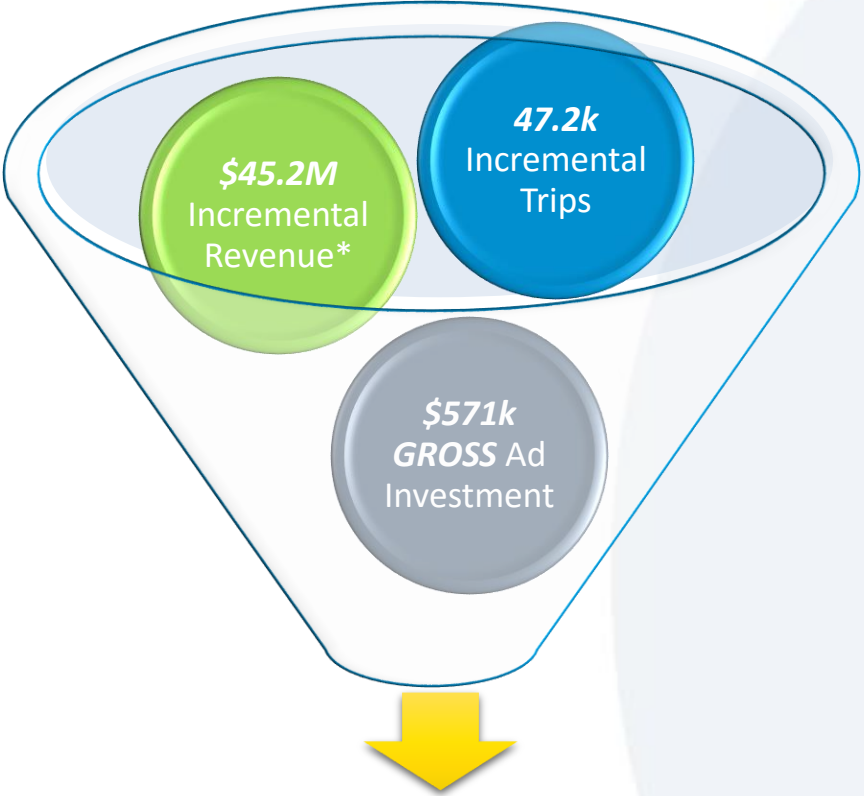
Chicago, Dallas and Boston all experienced increases in their incremental household visitation, and both Chicago and Dallas also beat their historical averages.

% Increment	Out of State 2015	Out of State 2016	Tampa Historical Average
Boston	1.9k	2.7k	4.3k
Chicago	14.1k	28.7k	17.5k
Dallas	10.6k	14.7k	12.6k
Detroit	1.2k	1.1k	1.2k
Other Markets	3.8k	n/a	n/a
<b>Total Market</b>	<b>31.5k</b>	<b>47.2k</b>	<b>36.6k</b>
<i>Direct Comparison</i>	<i>27.7k</i>	<i>47.2k</i>	<i>31.5k</i>

# Tampa Bay's Out of State Marketing Campaign generated a GROSS ROI of \$79 for every dollar invested.



**Party Trip Spending**  
\$956  
*Out of State 2015: \$1,223*  
*Out of State 2014: \$956*



**\$79 GROSS Return on Investment**

*\$485k NET Ad Invest | \$93 NET Return on Investment*

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

# Incremental Spending

Incremental spending also had a notable increase this year, with the largest increases coming from Chicago (+47%), Boston (+29%) and Dallas (+27%).

Compared to 2015's total campaign, incremental spending was up 17%. However, compared to the same four markets advertised, incremental travel spending was up by 36%.

% Increment	Out of State 2015	Out of State 2016	Tampa Historical Average
Boston	\$2.3M	\$2.9M	\$4.4M
Chicago	\$17.4M	\$25.6M	\$18.1M
Dallas	\$12.3M	\$15.5M	\$13.9M
Detroit	\$1.3M	\$1.1M	\$1.2M
Other Markets	\$5.4M	n/a	n/a
<b>Total Market</b>	<b>\$38.6M</b>	<b>\$45.2M</b>	<b>\$37.8M</b>
<i>Direct Comparison</i>	<i>\$33.2M</i>	<i>\$45.2M</i>	<i>\$33.0M</i>

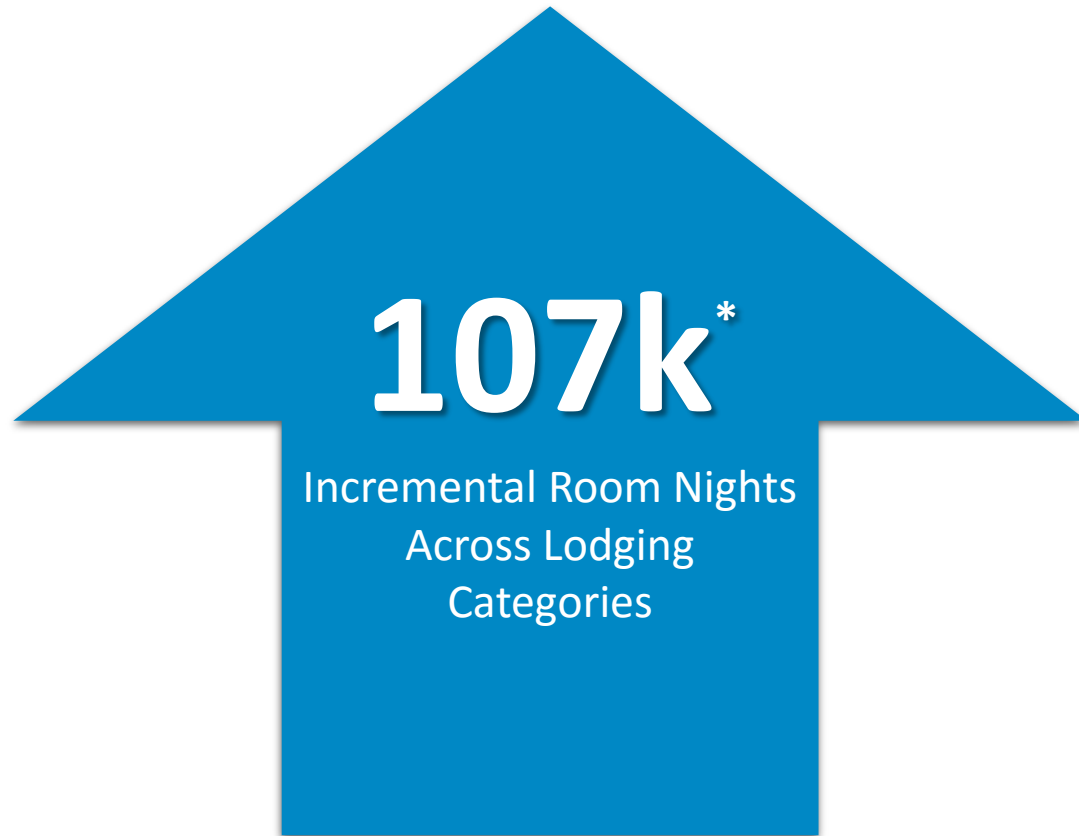
# Return on Investment

Return on Investment (both Gross and Net) increased significantly over 2015 and topped the historical average for Tampa Bay's Out of State Campaigns.

One market of note is Boston. Gross ROI has declined each year since 2014, while the ad investment has climbed. The cost per aware household continues to be efficient (\$0.20/HH), but it too has increased over time. This is a market that decision makers may want to watch.

Return on Investment	Out of State 2015	Out of State 2016	Tampa Historical Average
Boston	\$54	\$15	\$67
Chicago	\$80	\$160	\$115
Dallas	\$58	\$138	\$98
Detroit	\$31	\$11	\$24
Other Markets	\$24	n/a	n/a
<b>Gross ROI</b>	<b>\$52</b>	<b>\$79</b>	<b>\$65</b>
<i>Gross Direct Comparison</i>	\$64	\$79	\$81
<b>Net ROI</b>	<b>\$62</b>	<b>\$93</b>	<b>\$76</b>
<i>Net Direct Comparison</i>	\$76	\$93	\$95

# Incremental Room Nights



*\*The Out of State Marketing Campaign generated more than 310k incremental room nights for the entire Greater Tampa Bay area. Of those, 107k were overnight stays in Hillsborough County.*

The Out of State Marketing Campaign generated more than 107k 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 Out of State Marketing Campaign generated approximately 19% of the total room nights utilized by travelers in Hillsborough County during this timeframe.

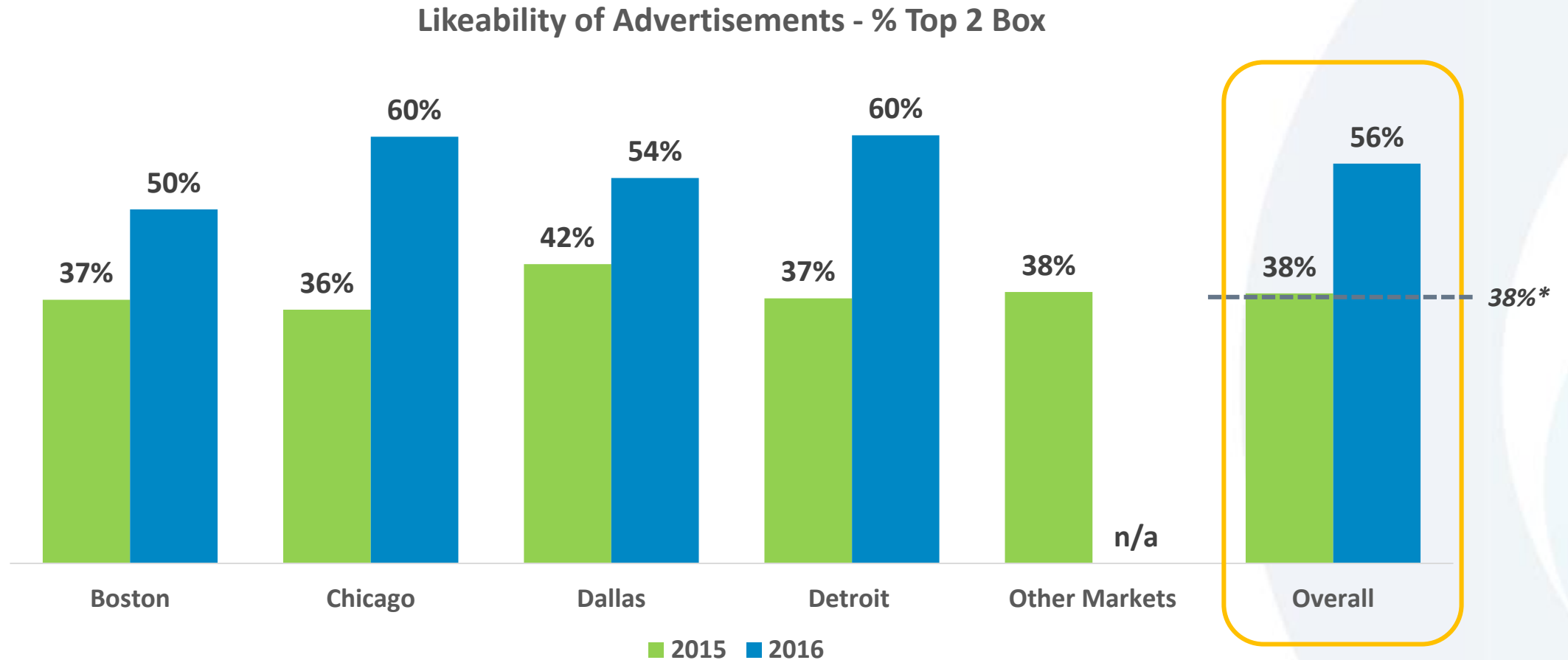
# Advertising Evaluation

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

03

# Likeability of the Out of State Campaign advertisements increased in every market measured, with an 18 point increase overall.



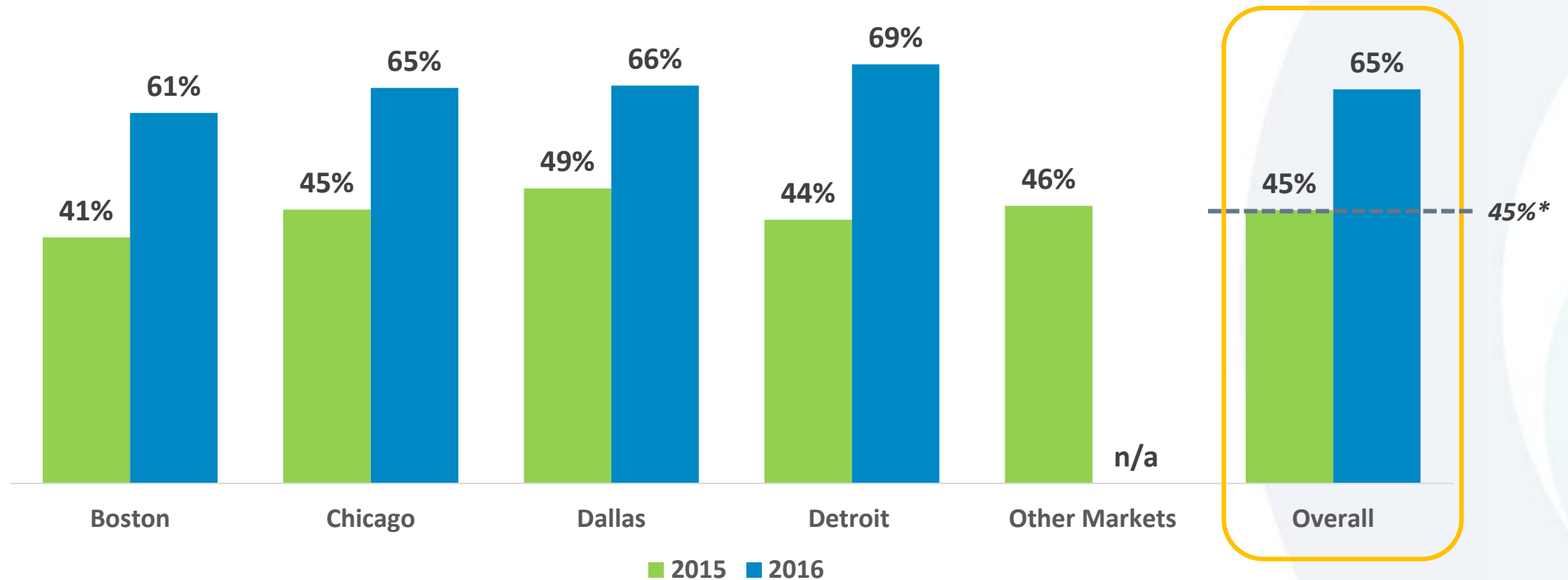
Q29: Using the scale provided, please rate how much you like this collection of advertisements for Tampa Bay.

*\*Direct Comparison*



# Additionally, the ads' impact on the appeal of Tampa Bay increased by significant margins in every market measured.

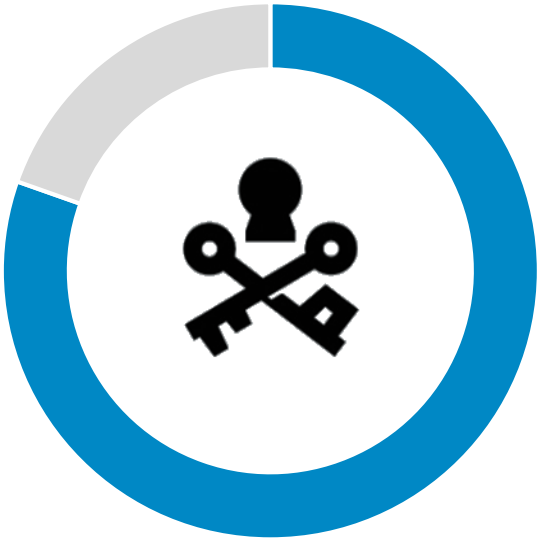
% Top 2 Box – Makes Tampa Bay Seem A Little/Much More Appealing



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

*\*Direct Comparison*

# Travelers believed the ads were relevant, differentiated and fit the Tampa brand very well. All three metrics scored higher than the H2R Industry Norm.



**80%**  
*Fits Brand Somewhat/Very Well*  
66% | 65%



**47%**  
*Pretty/Much Different*  
34% | 35%



**62%**  
*Somewhat/Very Relevant*  
43% | 43%

2015 Total Campaign | 2015 Direct Comparison

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.

# After significant declines in traveler message takeaways in 2015, all messages saw significant increases this year.

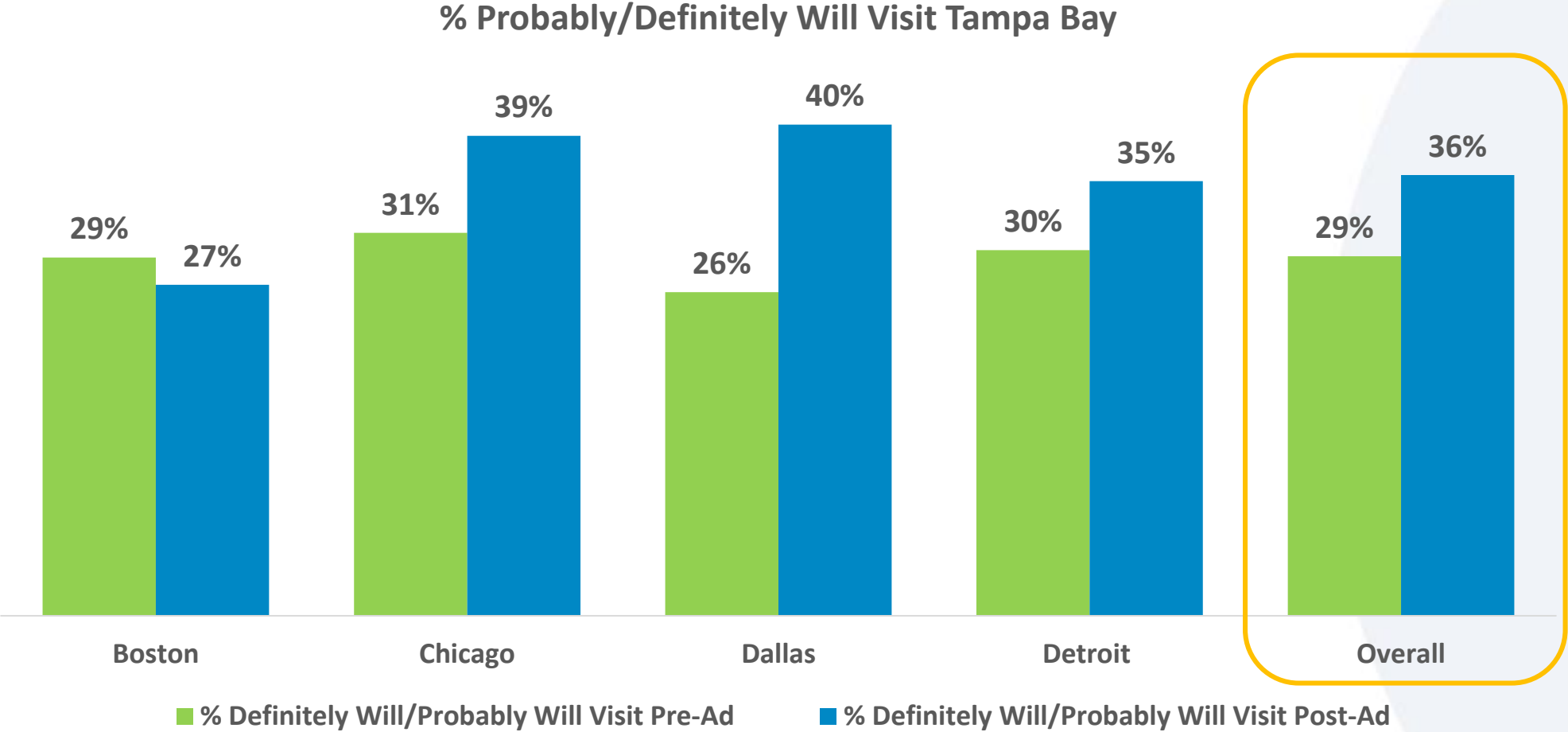
% Agree/Strongly Agree with Statements	<i>Out of State 2015 Direct</i>	<b>Out of State 2015 Overall</b>	<b>Out of State 2016</b>
Make Tampa Bay seem like an easy place to visit for a quick getaway	50%	49%	63%
Show me interesting new things to do that I'd like to explore	45%	45%	63%
Make me likely to include Tampa Bay as an option for my next getaway	39%	38%	54%
Make me want to find out more about planning a trip to Tampa Bay	37%	38%	53%
Make me want to visit the Tampa Bay website to find out more	34%	35%	52%
Make Tampa Bay seem like a unique destination that is different than other places I visit	31%	31%	49%

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.

# Post-ad exposure traveler intentions also increased significantly across the board in 2016.

% Agree/Strongly Agree with Statements	<i>Out of State 2015 Direct</i>	Out of State 2015 Overall	Out of State 2016
Search for things to do in the Tampa Bay area	37%	37%	52%
Visit Tampa Bay's website	28%	30%	43%
Visit with friends and family who visited before	27%	27%	41%
Request a Visitor's Guide or additional information	25%	24%	37%
Seek out travel blogs/review sites	21%	21%	35%
Visit the Tampa Bay Facebook Page	16%	16%	33%
Book a trip to Tampa Bay	20%	20%	32%

# Most markets saw an increase in intent to visit the Tampa area 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?

# Travel Landscape

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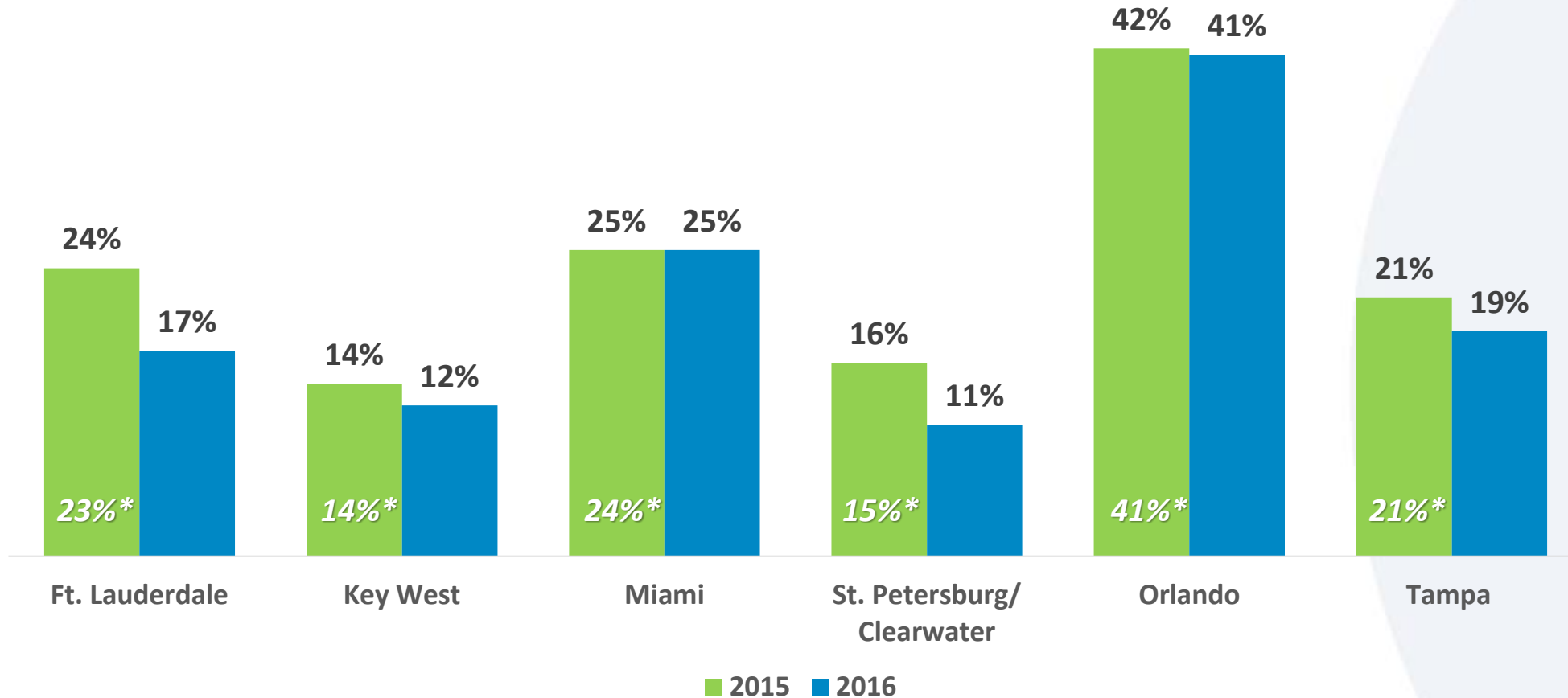
+ *Competitive travel landscape*

+ *Making travel plans*

04

# Travel to all area destinations was steady or even declined slightly this year, and Tampa was no exception.

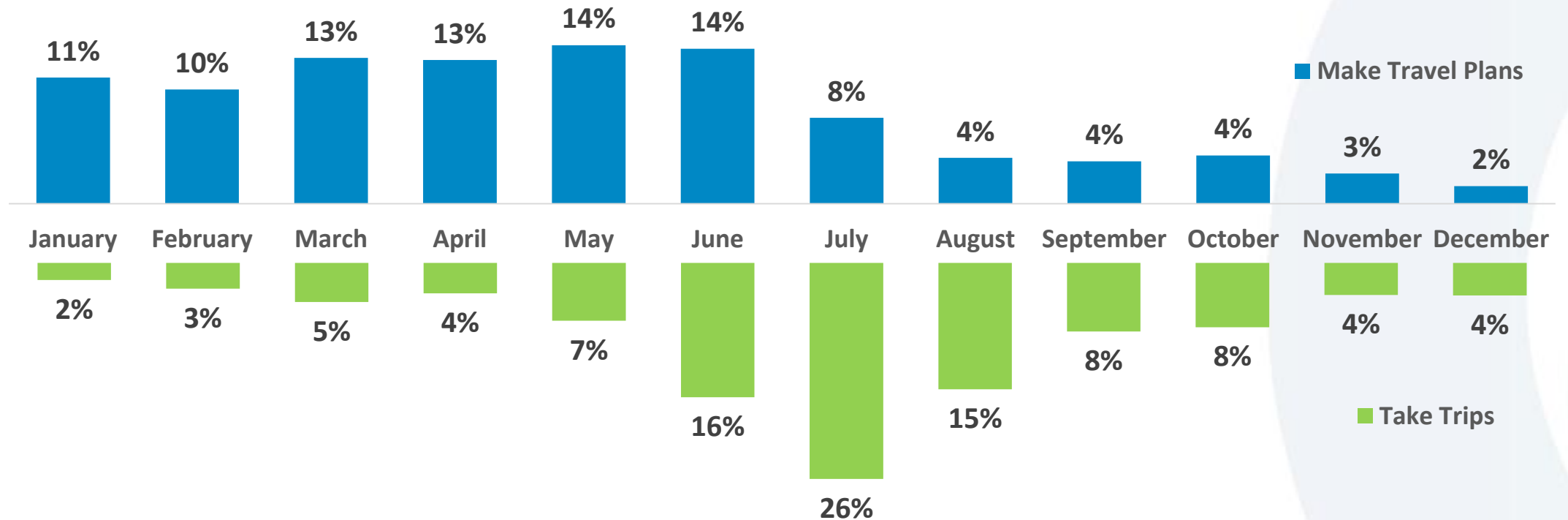
Destinations Visited in the Past 3 Years



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

\*Direct Comparison

# Overall, travelers in the target markets are most likely to make their travel plans in March-June, and travel surges in July.



\*Those who visited Tampa in 2016 so far are most likely to plan their trips in February-June (64%) and take their trips in June-August (50%).



# Travel Planning by Market

Make Travel Plans | Take Trips

	Overall	Boston	Chicago	Dallas	Detroit
January	11%   2%	14%   3%	10%   2%	10%   1%	12%   2%
February	10%   3%	9%   5%	10%   3%	10%   1%	14%   4%
March	13%   5%	16%   2%	12%   5%	14%   6%	10%   5%
April	13%   4%	13%   4%	12%   2%	14%   3%	13%   6%
May	14%   7%	14%   8%	13%   6%	17%   7%	13%   6%
June	13%   16%	12%   12%	17%   18%	11%   21%	12%   11%
July	8%   26%	6%   27%	8%   26%	9%   22%	7%   28%
August	4%   15%	3%   17%	5%   14%	4%   13%	5%   18%
September	4%   8%	4%   9%	4%   7%	4%   10%	4%   7%
October	4%   8%	3%   7%	6%   10%	3%   7%	4%   5%
November	3%   4%	3%   3%	2%   4%	2%   4%	4%   4%
December	2%   4%	2%   3%	1%   4%	2%   4%	2%   3%

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



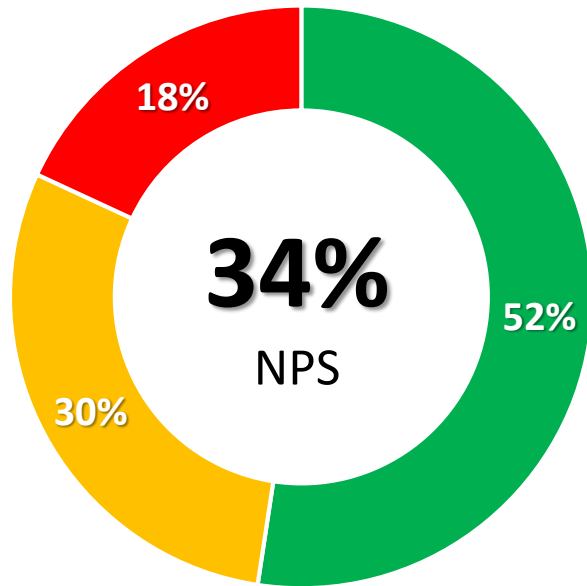
# Tampa Bay Traveler Profile

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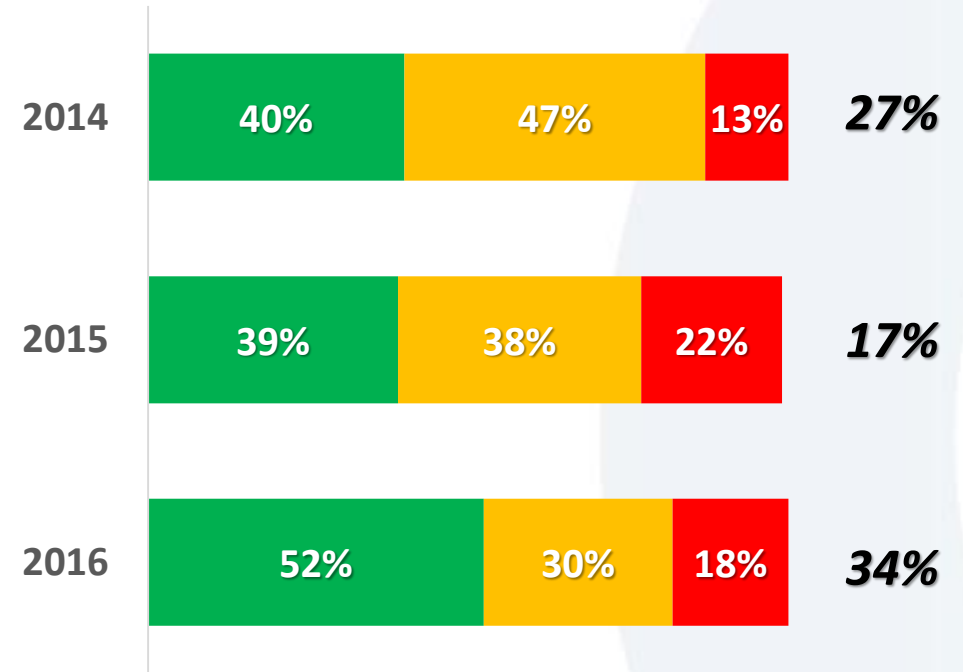
- + *Tampa Bay traveler behavior*
- + *Activity participation and functional drivers*
- + *Accommodations, length of stay and more*
- + *Tampa Bay visitors' demographic profile*

05

# The number of Promoters of Tampa Bay increased significantly this year, providing for a record-breaking NPS of 34%.



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

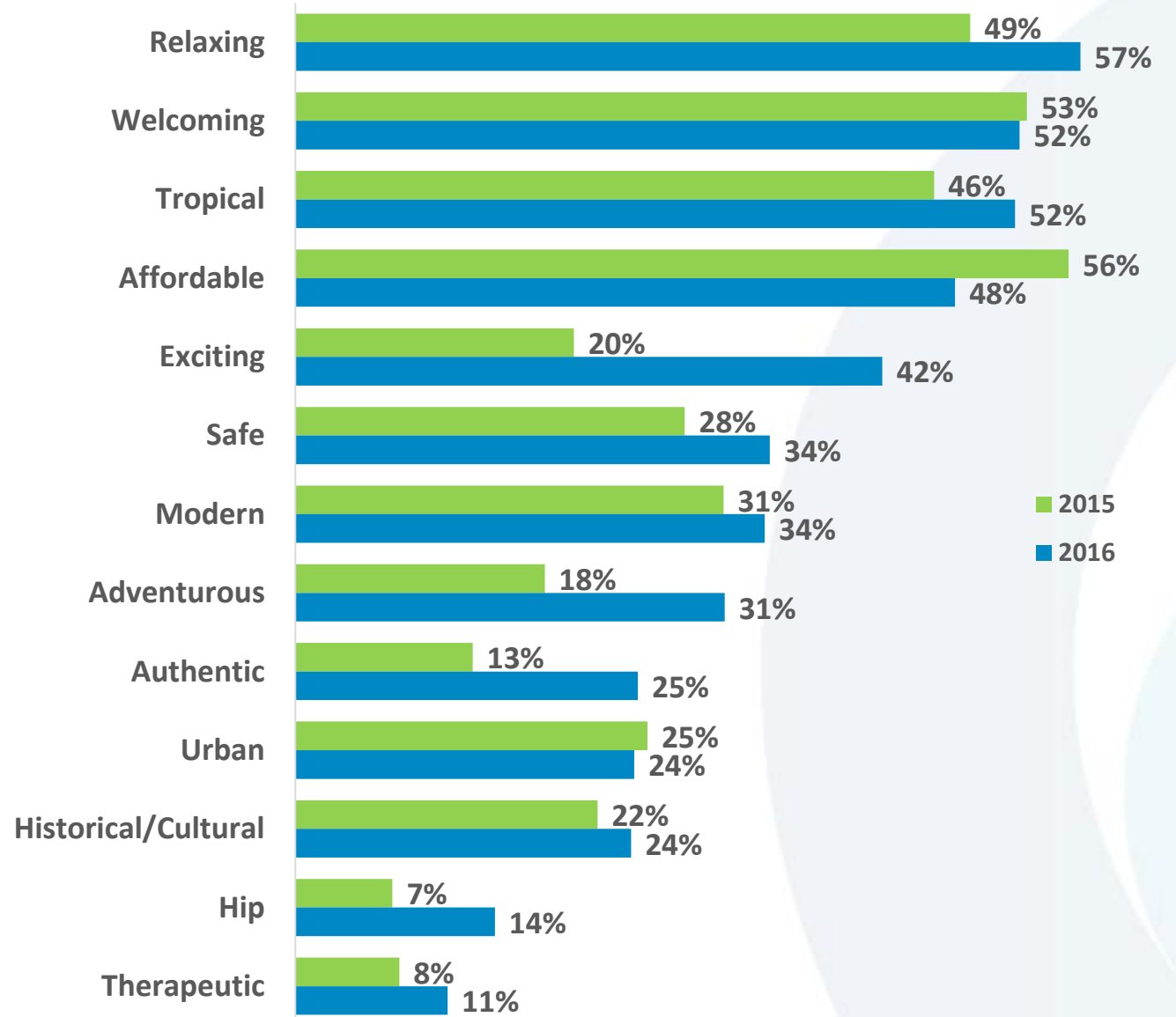


■ Promoters (9-10) ■ Neutrals (7-8) ■ Detractors (0-6)

# Tampa Bay Characteristics

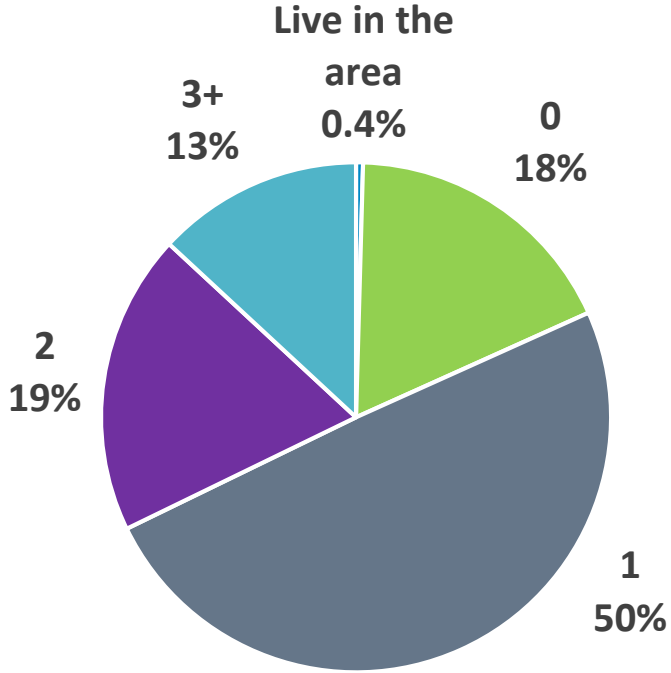
The words travelers use to describe Tampa Bay changed considerably this year.

There were significant increases in the number of travelers describing Tampa as *exciting*, *adventurous* and *authentic*. However, there was a notable decline in travelers who would describe Tampa as *affordable*.

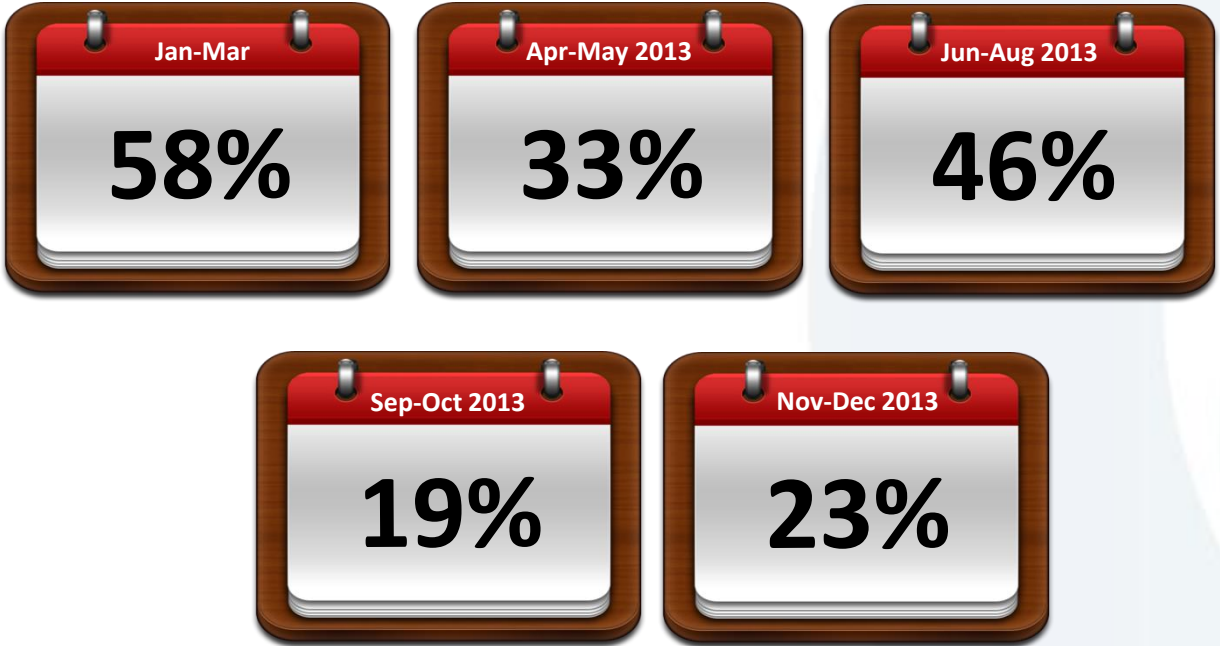


# The January – March timeframe continues to be the most popular for Tampa Bay visitors. In the past 12 months, travelers visited the Tampa Bay area an average of 1.4 times.

Number of Trips in Past 12 Months – 1.4

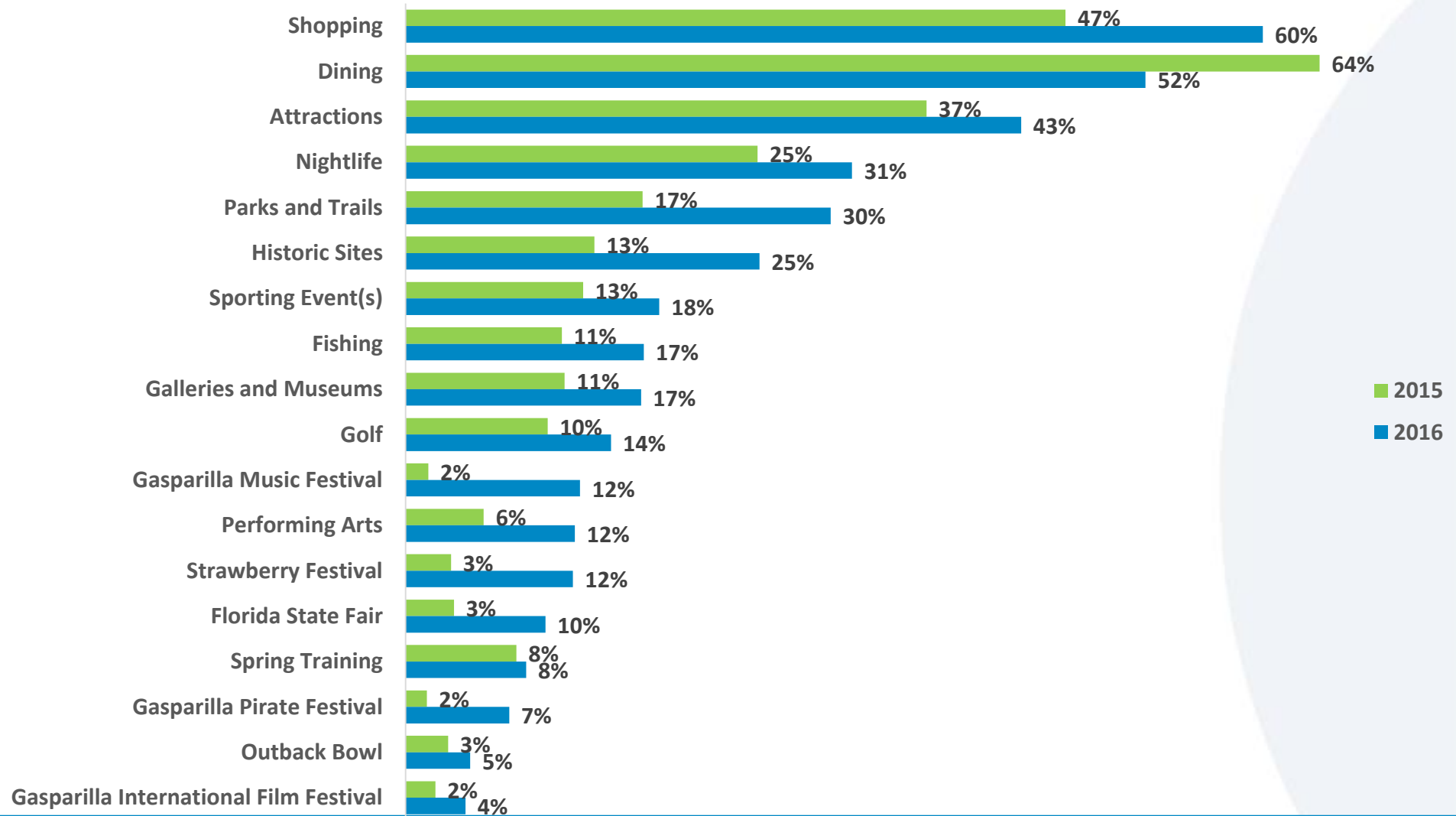


Months Visited Tampa Bay in the Past 3 Years



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?

# With the exception of dining, all area activity participation saw notable increases in attendance in 2016.



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

Along with attractions, shopping and dining, parks & trails also drive travelers to visit the Tampa area.

Functional Drivers of Visitation



Attractions  
**31%**



Shopping  
**24%**



Dining  
**21%**

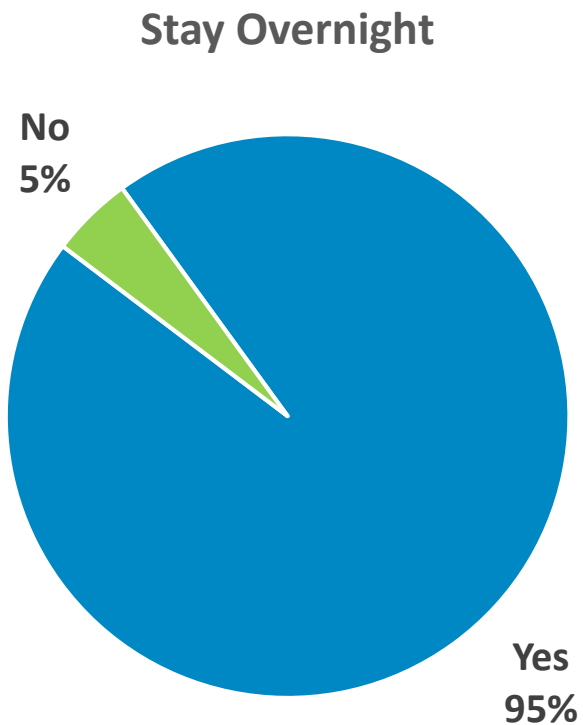


Parks & Trails  
**14%**

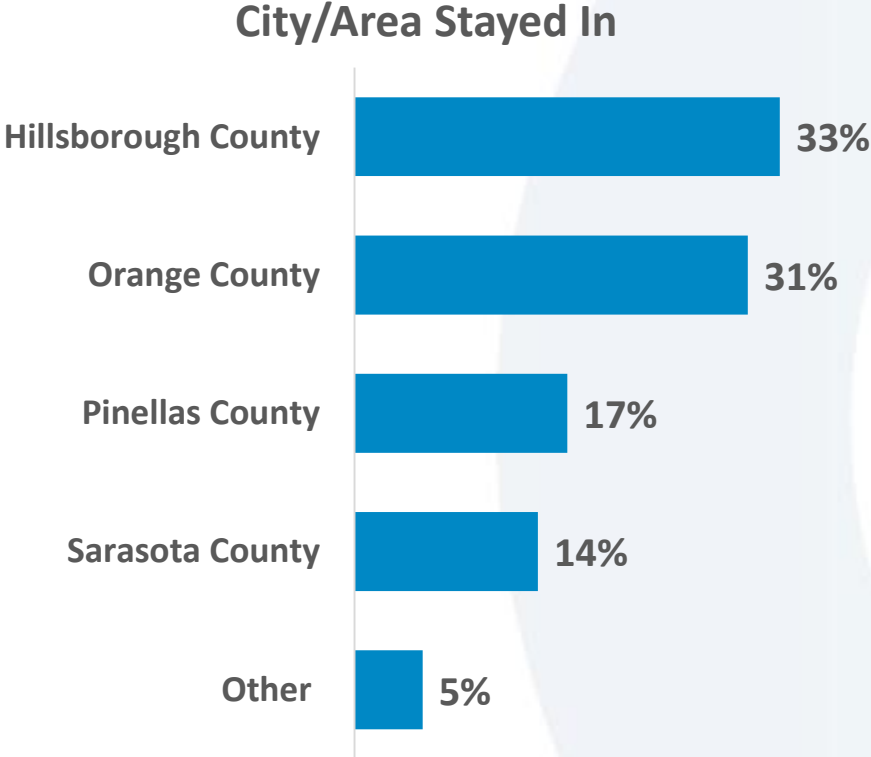
Q14: Of these activities, please indicate if there were any that were a major influence in your decision to visit Tampa on this most recent trip.



The majority of Tampa Bay visitors spent the night on their last visit to the area and stayed an average of 4.2 nights. Approximately 33% stayed in Hillsborough County– a 3% increase over last year.



4.2  
Nights in the  
Area



RESPONDENT BASE: TAMPA BAY VISITORS LAST 3 YEARS | N=223

RESPONDENT BASE: ALL OVERNIGHT VISITORS | N=212

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?

# Hotel/Motel accommodations increased this year, while most other accommodations saw declines.

	Out of State 2015 Overall	Out of State 2016
Hotel or Motel	54%	54%
Bed & Breakfast	0%	6%
Condominium, Cabin or Cottage	5%	5%
Timeshare	3%	4%
Campground/RV Park	1%	1%
Resort	7%	7%
Airbnb/Vacation Rental	n/a	2%
Home of Family or Friend	29%	21%

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

**Tampa Bay’s Prospects and Brand Advocates are more likely to have children and earn lower household incomes than visitors from 2016. Interestingly, recent visitors live farthest away while prospects live closest.**

	Visitors Since Jan 2016	Prospects*	Brand Advocates**
Respondent Age	41	40	42
Children in the Home	47%	53%	49%
No Children	53%	47%	51%
Males	46%	44%	40%
Females	54%	56%	60%
HH Income	\$89.6k	\$81.4k	\$82.0k
Distance	1,052 miles	1,026 miles	1,041 miles
% College Graduate +	57%	52%	60%

\*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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## H2R MARKET RESEARCH

*Reveal Your Customer's Full Experience*