



ST.PETE
CLEARWATER

Visit St. Pete/Clearwater VISITOR PROFILE STUDY

Report of Findings
Q2 2022

Research prepared for Visit St. Pete/Clearwater by:

Destination  Analysts



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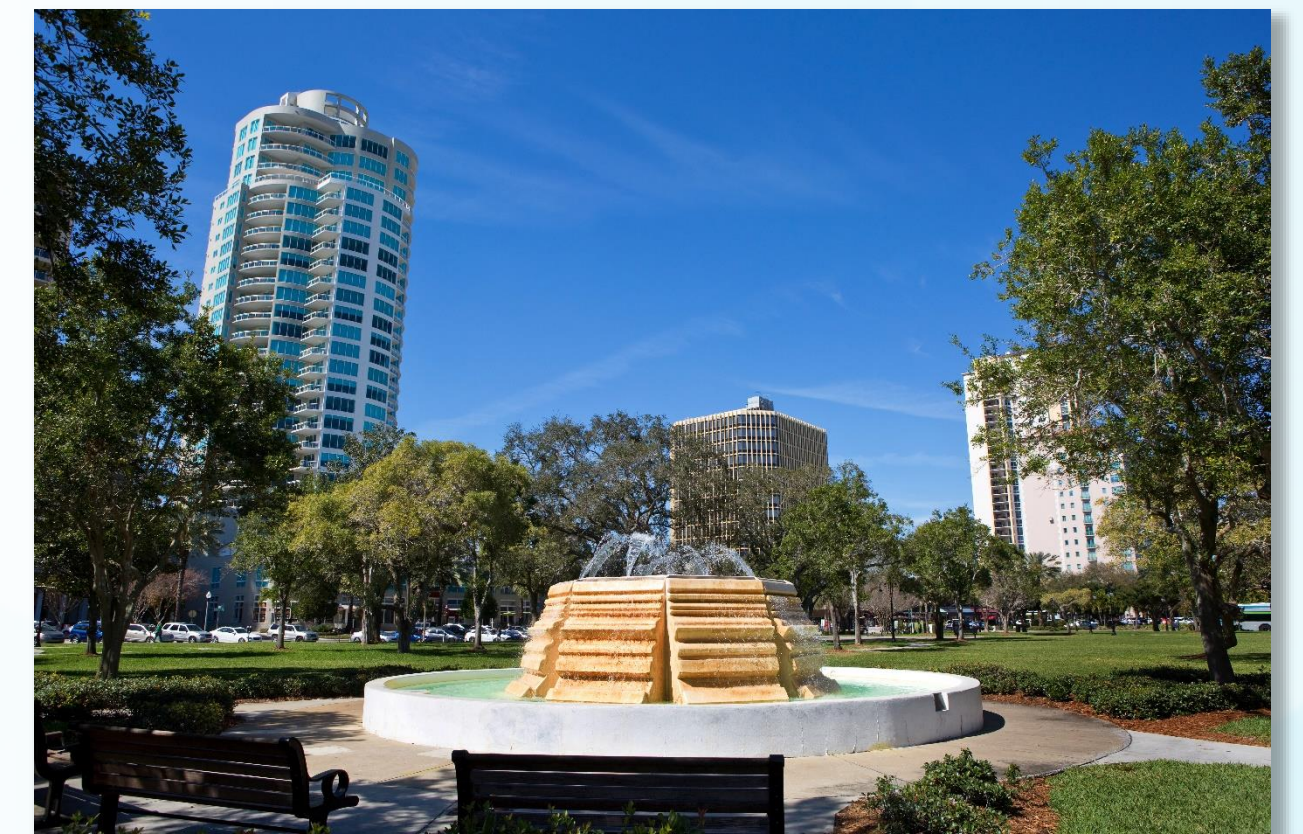
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RESEARCH OVERVIEW & METHODOLOGY

This report presents the quarterly interim findings of a comprehensive visitor profile development study conducted by Destination Analysts, Inc. on behalf of Visit St. Pete/Clearwater. The data presented here comes from an in-person intercept survey of St. Pete/Clearwater area visitors at locations throughout the destination. To be considered a visitor, respondents had to reside outside of Pinellas County. This interim report presents the top-line survey data collected from visitors surveyed between April 2022 — June 2022.

The data presented for all visitors is weighted based on the relative proportion of lodging guests, home share, VFR and day trip visitors observed in survey locations OUTSIDE lodging properties. Secondary inputs such as total hotel room inventory and average occupancy were also used in calculating these weights.

In total, 1,228 completed surveys from Pinellas County visitors were collected.

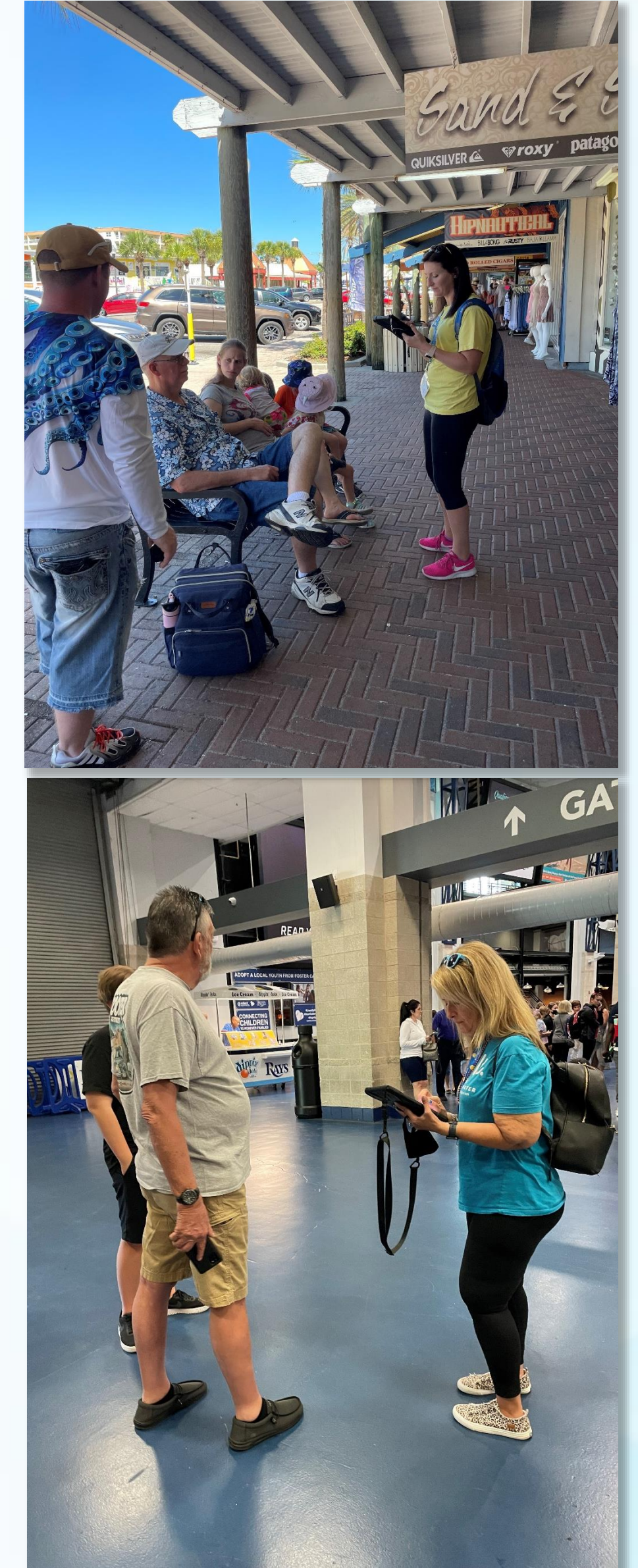


Above: Images of the St. Pete/Clearwater area.

RESEARCH OVERVIEW & METHODOLOGY

Destination Analysts' survey team worked at locations around the St. Pete/Clearwater area as well as at the Tampa International Airport to randomly select and interview visitors. The questionnaire was administered to persons residing outside Pinellas County at the following locations:

- Chihuly Collection
- Clearwater Beach
- Clearwater Marine Aquarium
- Dunedin
- Hyatt Place
- John's Pass Village & Boardwalk
- Museum of Fine Arts
- Pier 60
- Salvador Dali Museum
- Sandpearl Resort
- Shephard's Beach Resort
- St. Pete-Clearwater International Airport
- St. Pete Pier
- Sunken Gardens
- Tampa International Airport
- The James Museum
- Tradewinds Island Grand
- Wyndham Grand Clearwater Beach



Above: Destination Analysts Field Research Team

RESEARCH OBJECTIVES

The overarching goal of this survey-based research is to create in-depth profiles of Pinellas County visitors, including:

- Travel planning resources used by St. Pete/Clearwater area visitors
- Detailed trip characteristics (i.e. tripographic information like the reason for visiting the area, length of stay, place of stay, etc.)
- Travel party composition
- Activities & attractions visited in the St. Pete/Clearwater area
- Evaluation of St. Pete/Clearwater brand attributes
- Detailed visitor spending estimates
- Visitor satisfaction
- Visitor demographics



Above: Images of the St. Pete/Clearwater area. Courtesy of Instagram.com/vspc.

The background of the slide features a low-angle shot of a green rectangular sign with white lettering that reads "St. Petersburg CITY LIMIT". The sign is supported by several metal poles. In the background, several tall palm trees are visible against a clear blue sky. The entire image is overlaid with a semi-transparent dark grey filter.

Q2 2022

Economic Impact Analysis

ECONOMIC IMPACT: DEFINITIONS

The following key definitions related to economic impact are used in this report.

- **Direct visitor spending** – The injection of money into the local economy that takes place when a visitor purchases any good or service inside Pinellas County.
- **Total economic impact** – The total change in economic activity in Pinellas County generated by direct spending. This includes direct visitor spending as well as its induced and indirect effects in the county.
- **Tax revenues generated** – Tax revenues flowing to government coffers as a result of direct visitor spending.
- **Hotel room nights** – The estimated number of hotel room nights in Pinellas County generated by visitors.
- **Indirect effects** – Changes in inter-industry transactions when supplying industries respond to increased demands from the directly affected industries (e.g., impacts from non-wage expenditures).
- **Induced effects** – Changes in local spending that result from income changes in the directly and indirectly affected industry sectors (e.g., impacts from wage expenditures; the subsequent round of spending in the local economy made by the households of the employees of companies that incur both direct and indirect expenditures).

ECONOMIC IMPACT: DEFINITIONS

- **Hotel guests** – Pinellas County visitors who stayed overnight in a Pinellas County hotel, motel, resort or inn.
- **Visiting friends/relatives (VFRs)** – Pinellas County visitors who stayed overnight in the private residence of a friend or family member who lives in Pinellas County.
- **Vacation rental guests** – Pinellas County visitors who stayed overnight in a condo, vacation home or other private home rental in Pinellas County.
- **Day trip visitors (regional)** – Pinellas County visitors who came for the day and reside in the regional area surrounding Pinellas County.
- **Day trip visitors (travelers)** – Pinellas County visitors who came for the day, stayed overnight outside Pinellas County and reside outside the regional area surrounding the county.
- **Peer-to-peer home share guests** – Pinellas County visitors who stayed overnight in a home share rental in Pinellas County booked through AirBnB, VRBO or similar.
- **Other** – Pinellas County visitors who stayed overnight in other types of lodging.

ECONOMIC IMPACT ESTIMATES: KEY FINDINGS – Q2 2022

The following presents the key findings related to the economic impact of tourism to Pinellas County from April 2022 – June 2022.

	April 2022	May 2022	June 2022	Q2 (April 2022 – June 2022)
Visitors to Pinellas County	1,479,983	1,307,419	1,290,014	4,077,416
Direct Visitor Spending in Pinellas County	\$675,572,736	\$568,840,560	\$570,955,128	\$1,815,368,425
Total Economic Impact of Tourism to Pinellas County	\$1,135,096,114	\$956,149,647	\$962,246,358	\$3,053,492,119
Tax Revenues Generated for Pinellas County	\$44,192,361	\$36,084,047	\$36,558,409	\$116,834,816
Hotel Room Nights	608,427	583,454	556,030	1,747,912
Visitor Industry Payroll	\$364,071,875	\$307,261,674	\$308,919,008	\$980,252,557
Jobs Supported	11,200	9,453	9,497	30,150

ECONOMIC IMPACT ESTIMATES: SUMMARY OF KEY FINDINGS

The following presents a summary of key findings related to the economic impact of tourism to Pinellas County from April 2022 – June 2022

- **Visitors to Pinellas County** - Pinellas County had a total of 4.1 million visitors between April 2022 – June 2022. The largest segment of Pinellas County's visitor volume this quarter is day trip visitors from outside the surrounding region, comprising 1.3 million visitors, or 33 percent of all visitors.
- **Direct Visitor Spending in Pinellas County** - The Pinellas County tourism industry generated \$1.8 billion in direct visitor spending inside the county from April 2022 – June 2022. The largest share of this spending was generated by hotel guests who stayed overnight in commercial lodging. These visitors were responsible for \$879 million in visitor spending, or 48 percent of the total.
- **Total Economic Impact of Tourism to Pinellas County** – Tourism generated a total of \$3.05 billion in economic impact for Pinellas County during April 2022 – June 2022. The total economic impact is comprised of direct visitor spending, as well as indirect and induced effects.

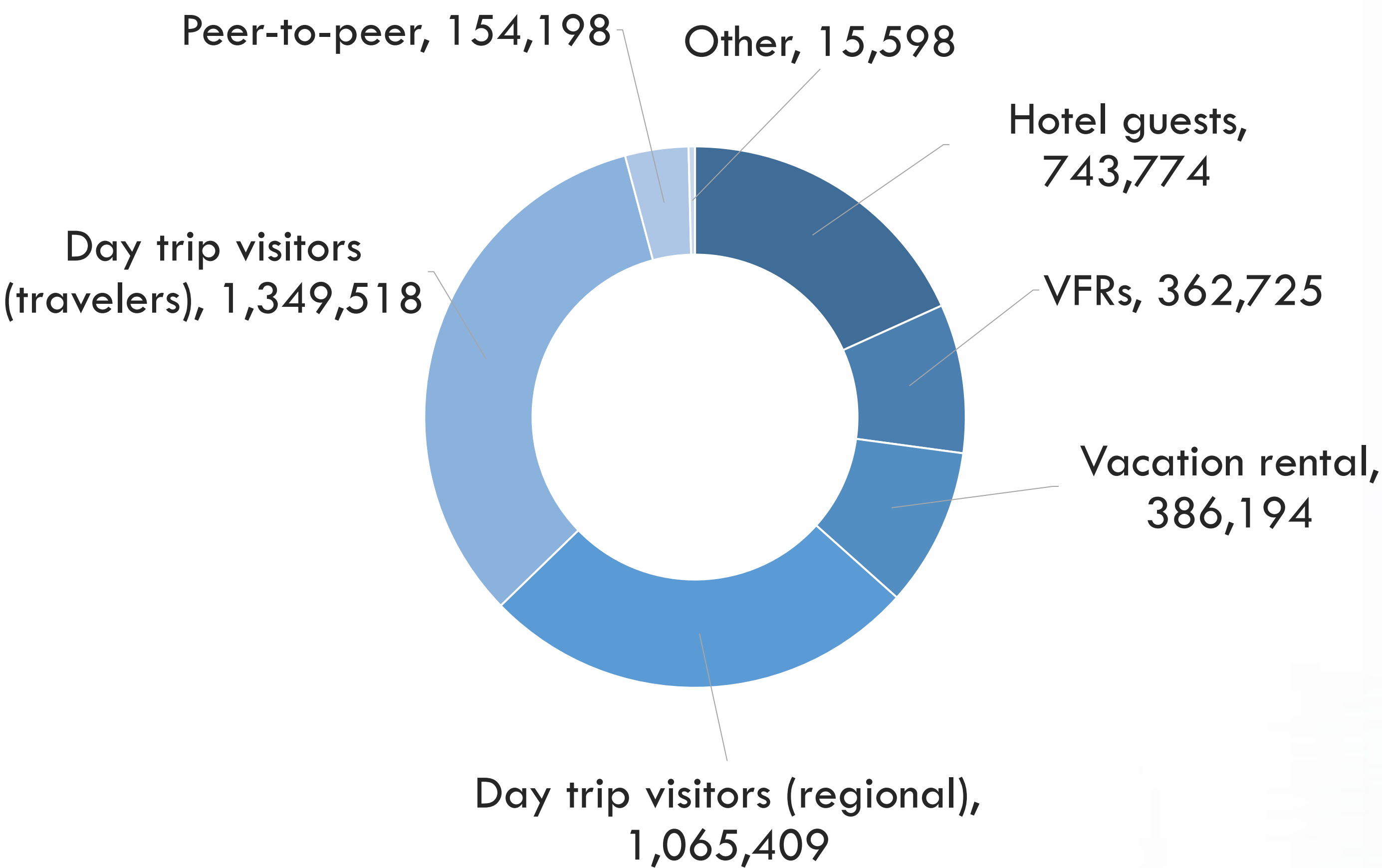
ECONOMIC IMPACT ESTIMATES: SUMMARY OF KEY FINDINGS

- **Tax Revenues Generated for Pinellas County** – Pinellas County’s tourism industry generated \$116.8 million in tax revenues for governmental entities from April 2022 – June 2022. Taxes directly generated by the visitor industry include revenues from the transient occupancy tax (hotel tax), sales taxes and property taxes paid on lodging facilities.
- **Hotel Room Nights** – Between April 2022 – June 2022, an estimated 1.75 million hotel room nights were generated in Pinellas County by visitors.
- **Visitor Industry Payroll and Jobs supported** – Between April 2022 – June 2022, the Pinellas County tourism industry had an estimated total combined payroll of \$980 million. This is estimated to have supported 30,150 jobs county-wide.



Above: Images of the St. Pete/Clearwater area.

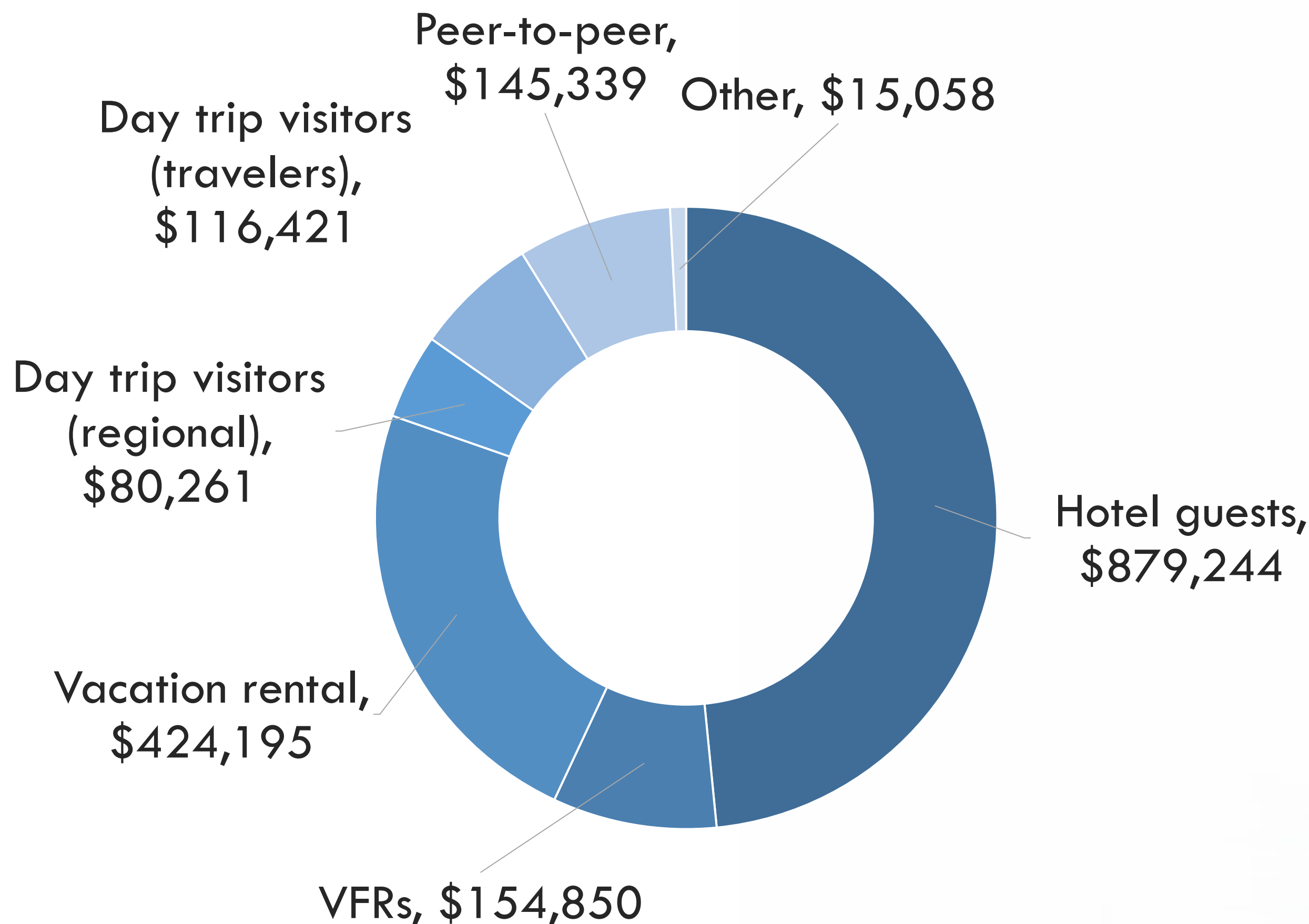
VISITORS TO PINELLAS COUNTY



Visitors to Pinellas County, by type of visitor

Hotel guests	743,774
VFRs	362,725
Vacation rental	386,194
Day trip visitors (regional)	1,065,409
Day trip visitors (travelers)	1,349,518
Peer-to-peer	154,198
Other	15,598
TOTAL VISITORS	4,077,416

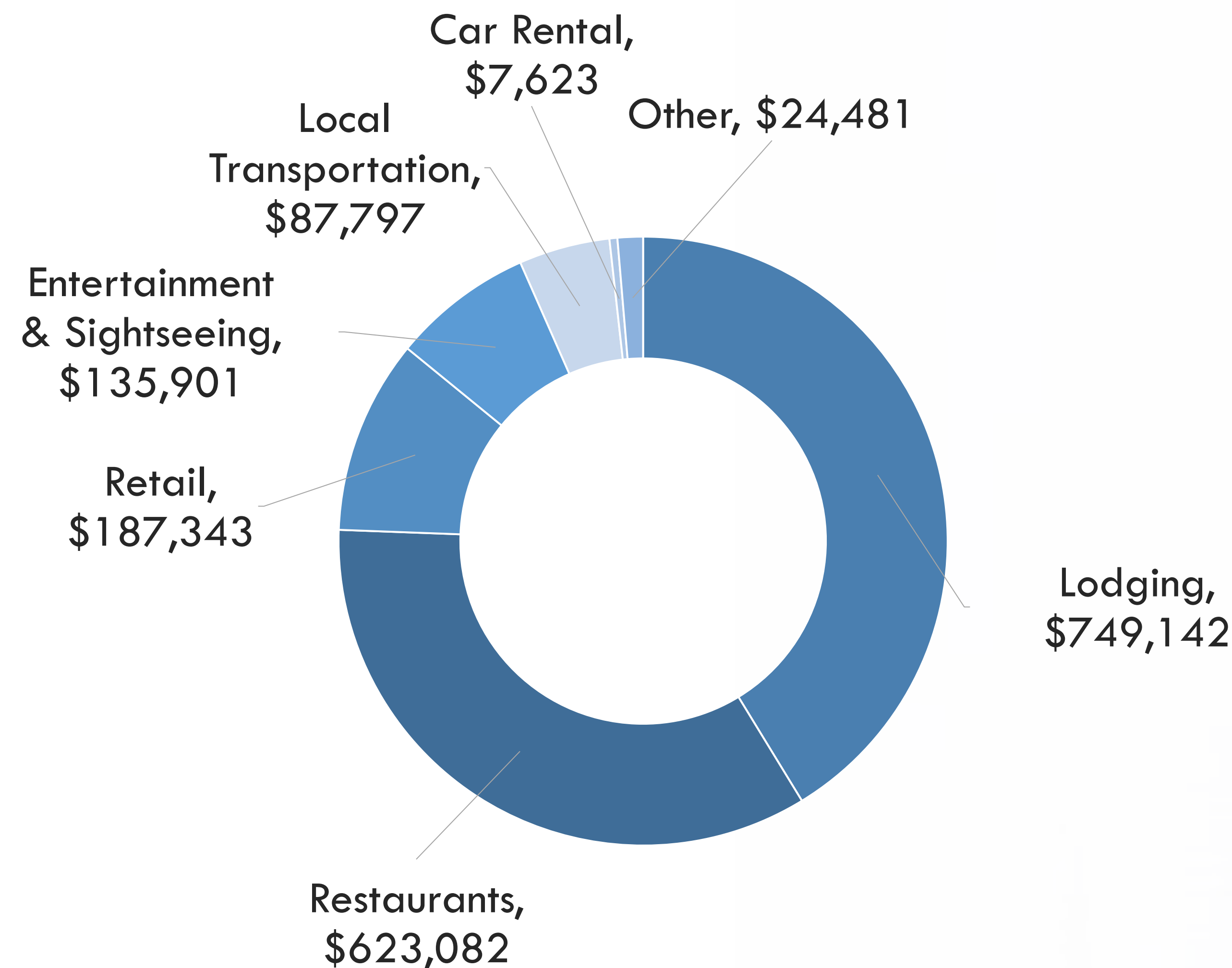
DIRECT VISITOR SPENDING: BY TYPE OF VISITOR



**Spending in Pinellas County, by type of visitor
(in thousands)**

Hotel guests	\$879,244
VFRs	\$154,850
Vacation rental	\$424,195
Day trip visitors (regional)	\$80,261
Day trip visitors (travelers)	\$116,421
Peer-to-peer	\$145,339
Other	\$15,058
TOTAL DIRECT VISITOR SPENDING	\$1,815,368

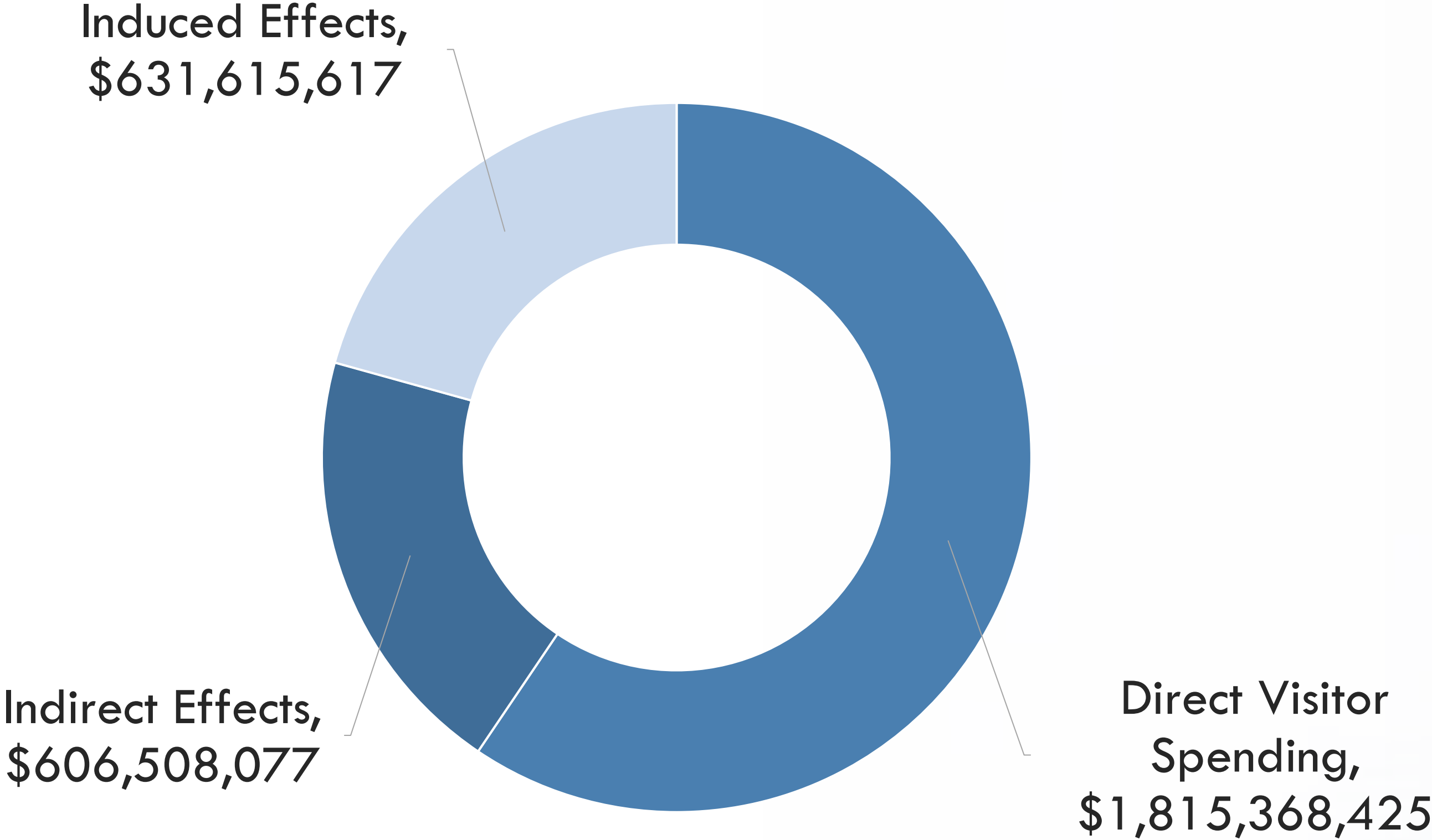
DIRECT VISITOR SPENDING: BY TYPE OF SPENDING



**Spending in Pinellas County, by type of spending
(in thousands)**

Lodging	\$749,142
Restaurants	\$623,082
Retail	\$187,343
Entertainment & Sightseeing	\$135,901
Local Transportation	\$87,797
Car Rental	\$7,623
Other	\$24,481
TOTAL DIRECT VISITOR SPENDING	\$1,815,368

TOTAL ECONOMIC IMPACT

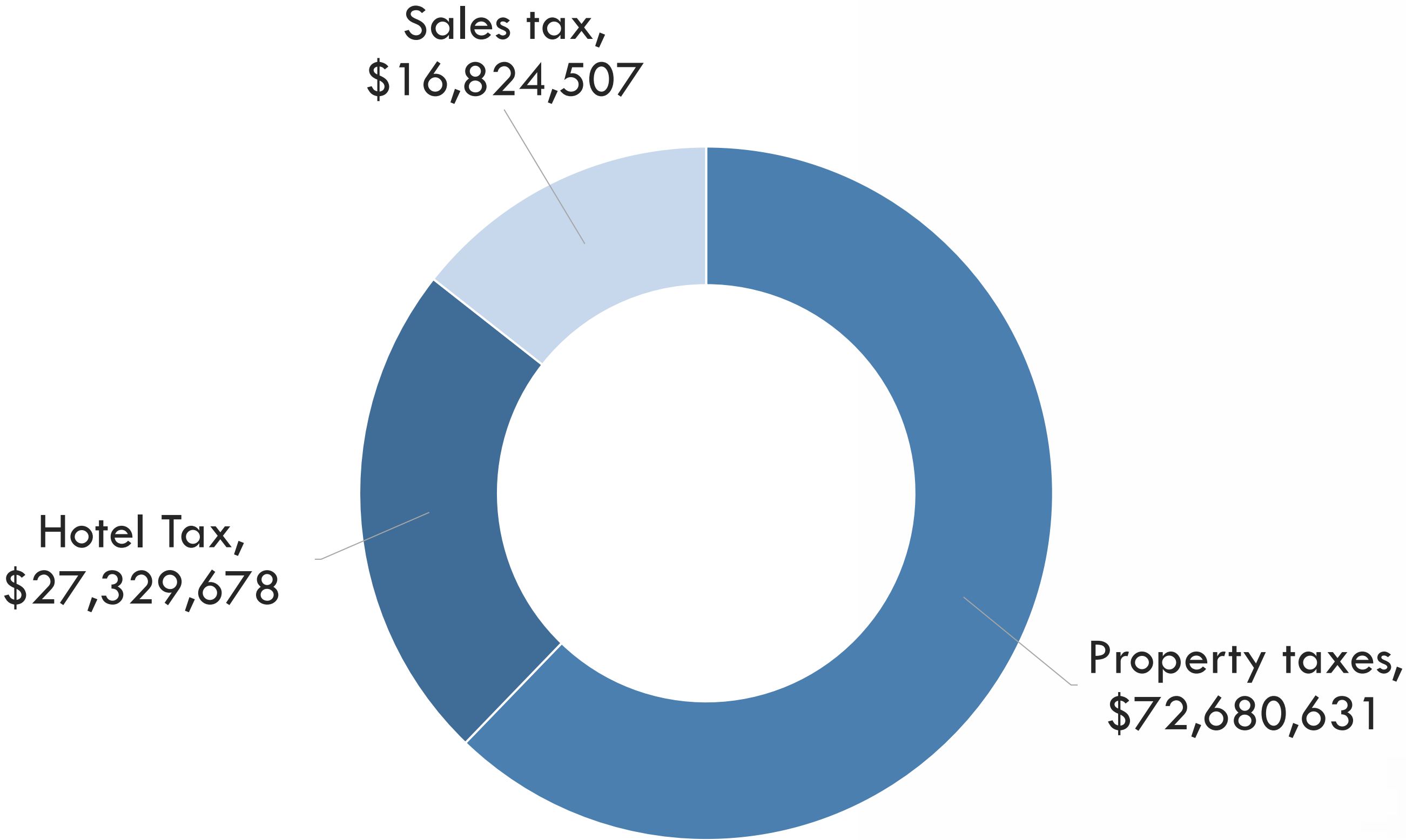


Economic Impact Estimates, by type of effect

Direct Visitor Spending	\$1,815,368,425
Indirect Effects	\$606,508,077
Induced Effects	\$631,615,617

TOTAL ECONOMIC IMPACT	\$3,053,492,119
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TAX REVENUES GENERATED



Tax Revenues Generated, by type of tax

Property taxes	\$72,680,631
Hotel Tax	\$27,329,678
Sales tax	\$16,824,507

**TOTAL TAX REVENUES
GENERATED** **\$116,834,816**

ECONOMIC IMPACT YOY COMPARISON

The following presents the estimated economic impact of tourism to Pinellas County comparing Q2 2022 to past years.

- In this second quarter of 2022, the travel and tourism industry continued its recovery from the effects and impacts of the COVID 19 pandemic with vaccine and mask restrictions being lifted across the nation. Pinellas County saw consistent visitor volume in Q2 of 2022 (up 2.8% from 2021 and down 4.8% from 2019). Visitor spending habits have shifted significantly with growth in spending far exceeding growth in volume. Total economic impact in Q2 is estimated to be up 22.3% from 2021 and up 24.8% from 2019.
- Compared to 2021, all metrics show some growth with all of the spending growth in the double digit range. Compared to 2019 however, volume and hotel room nights are down slightly while spending and taxes generated show significant growth.

ECONOMIC IMPACT YOY COMPARISON- Q2 2022 vs. Q2 2021

	April 2021	April 2022	% Change	May 2021	May 2022	% Change
Visitors to Pinellas County	1,369,254	1,479,983	8.1%	1,246,469	1,307,419	4.9%
Direct Visitor Spending in Pinellas County	\$519,025,570	\$675,572,736	30.2%	\$489,011,274	\$568,840,560	16.3%
Total Economic Impact of Tourism to Pinellas County	\$850,874,445	\$1,135,096,114	33.4%	\$804,951,802	\$956,149,647	18.8%
Tax Revenues Generated for Pinellas County	\$34,292,406	\$44,192,361	28.9%	\$32,250,935	\$36,084,047	11.9%
Hotel Room Nights	575,892	608,427	5.6%	558,625	583,454	4.4%
Visitor Industry Payroll	\$271,501,223	\$364,071,875	34.1%	\$256,240,283	\$307,261,674	19.9%
Jobs Supported	8,487	11,200	32.0%	7,972	9,453	18.6%

ECONOMIC IMPACT YOY COMPARISON- Q2 2022 vs. Q2 2021

	June 2021	June 2022	% Change	Q2 2021	Q2 2022	% Change
Visitors to Pinellas County	1,351,232	1,290,014	-4.5%	3,966,955	4,077,416	2.8%
Direct Visitor Spending in Pinellas County	\$511,896,891	\$570,955,128	11.5%	\$1,519,933,735	\$1,815,368,425	19.4%
Total Economic Impact of Tourism to Pinellas County	\$840,995,050	\$962,246,358	14.4%	\$2,496,821,297	\$3,053,492,119	22.3%
Tax Revenues Generated for Pinellas County	\$33,701,645	\$36,558,409	8.5%	\$100,244,986	\$116,834,816	16.5%
Hotel Room Nights	568,835	556,030	-2.3%	1,703,351	1,747,912	2.6%
Visitor Industry Payroll	\$268,475,647	\$308,919,008	15.1%	\$796,217,153	\$980,252,557	23.1%
Jobs Supported	8,379	9,497	13.4%	24,837	30,150	21.4%


ECONOMIC IMPACT YOY COMPARISON- Q2 2022 vs. Q2 2019

The following presents the estimated economic impact of tourism to Pinellas County comparing Q2 2022 and Q2 2019 (Prior to any measurable impacts of the coronavirus pandemic).

	April 2019	April 2022	% Change	May 2019	May 2022	% Change
Visitors to Pinellas County	1,514,030	1,479,983	-2.2%	1,315,797	1,307,419	-0.6%
Direct Visitor Spending in Pinellas County	\$528,499,413	\$675,572,736	27.8%	\$467,322,163	\$568,840,560	21.7%
Total Economic Impact of Tourism to Pinellas County	\$875,442,701	\$1,135,096,114	29.7%	\$772,332,415	\$956,149,647	23.8%
Tax Revenues Generated for Pinellas County	\$32,763,690	\$44,192,361	34.9%	\$28,125,482	\$36,084,047	28.3%
Hotel Room Nights	620,940	608,427	-2.0%	606,889	583,454	-3.9%
Visitor Industry Payroll	\$280,447,074	\$364,071,875	29.8%	\$248,358,981	\$307,261,674	23.7%
Jobs Supported	8,822	11,200	27.0%	7,810	9,453	21.0%

ECONOMIC IMPACT YOY COMPARISON- Q2 2022 vs. Q2 2020

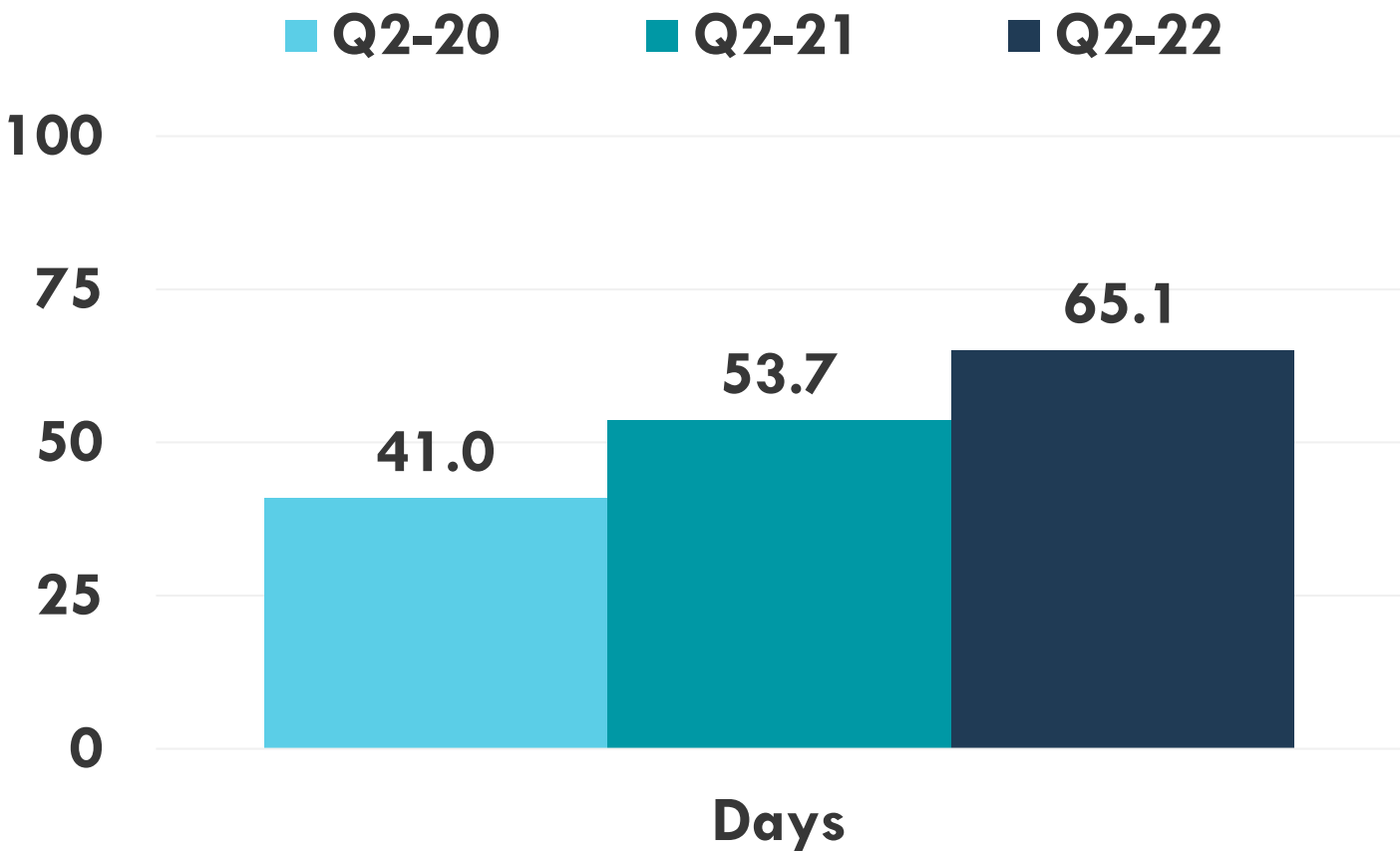
	June 2019	June 2022	% Change	Q2 2019	Q2 2022	% Change
Visitors to Pinellas County	1,452,636	1,290,014	-11.2%	4,282,463	4,077,416	-4.8%
Direct Visitor Spending in Pinellas County	\$481,356,011	\$570,955,128	18.6%	\$1,477,177,587	\$1,815,368,425	22.9%
Total Economic Impact of Tourism to Pinellas County	\$799,643,910	\$962,246,358	20.3%	\$2,447,419,026	\$3,053,492,119	24.8%
Tax Revenues Generated for Pinellas County	\$29,382,397	\$36,558,409	24.4%	\$90,271,569	\$116,834,816	29.4%
Hotel Room Nights	595,914	556,030	-6.7%	1,823,743	1,747,912	-4.2%
Visitor Industry Payroll	\$257,117,450	\$308,919,008	20.1%	\$785,923,505	\$980,252,557	24.7%
Jobs Supported	8,079	9,497	17.6%	24,710	30,150	22.0%

An aerial photograph of a beach resort. In the foreground, there's a parking lot and a building with a red roof. A large blue water slide is a prominent feature. The beach is crowded with people, and the ocean is visible in the background under a cloudy sky.

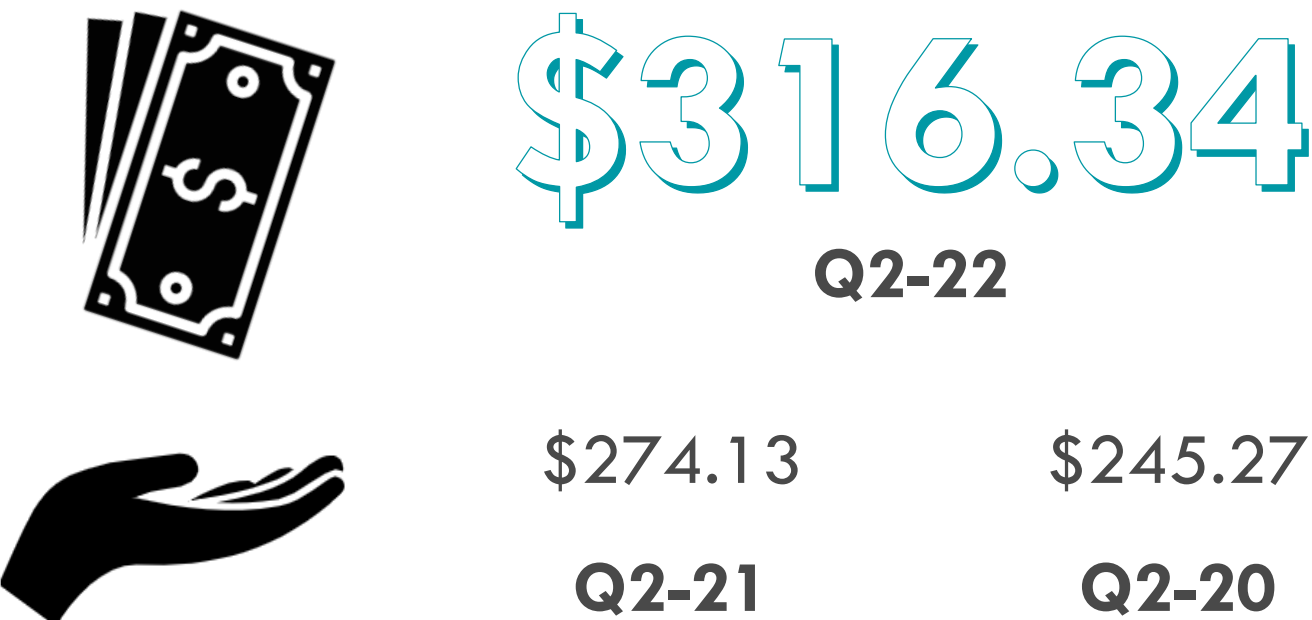
Q2 2022 St. Pete/Clearwater Visitor Summary

Q2 2022 comparison to Q2 2021 and Q2 2020

Average Time Between
Q2ision to Visit & Arrival



Average Daily Spending



Travel Party Size



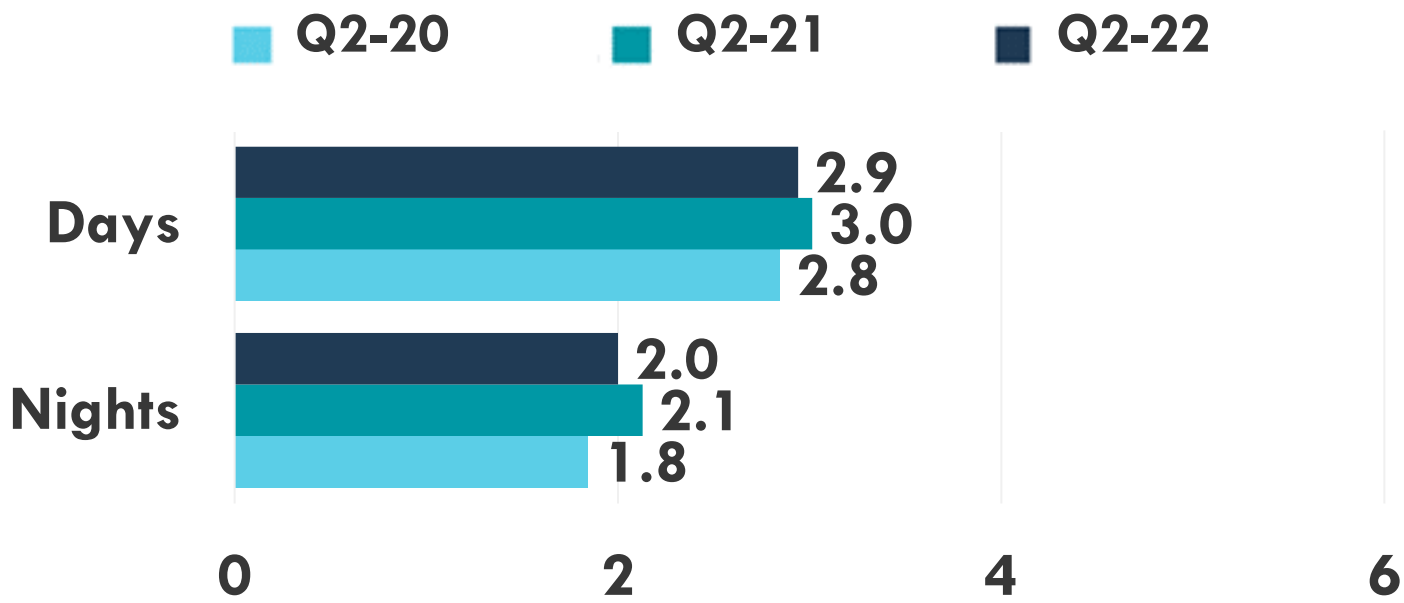
2.7

Q2-22

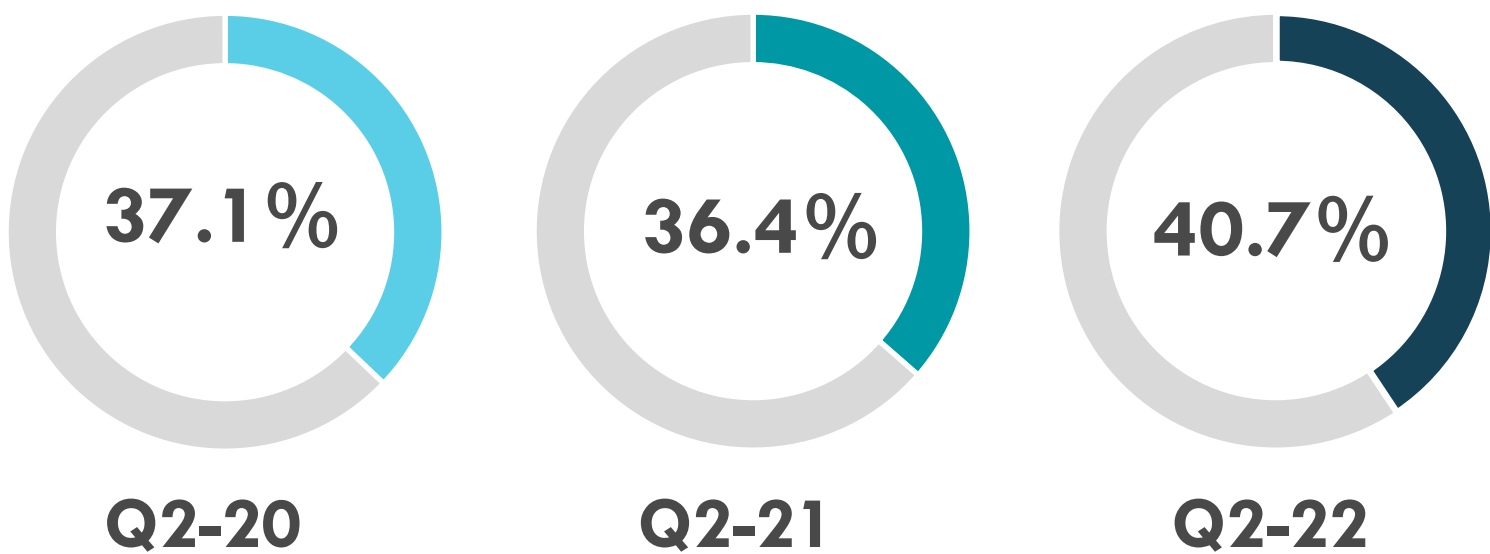
Q2-21 2.6

Q2-20 3.3

Average Days & Nights

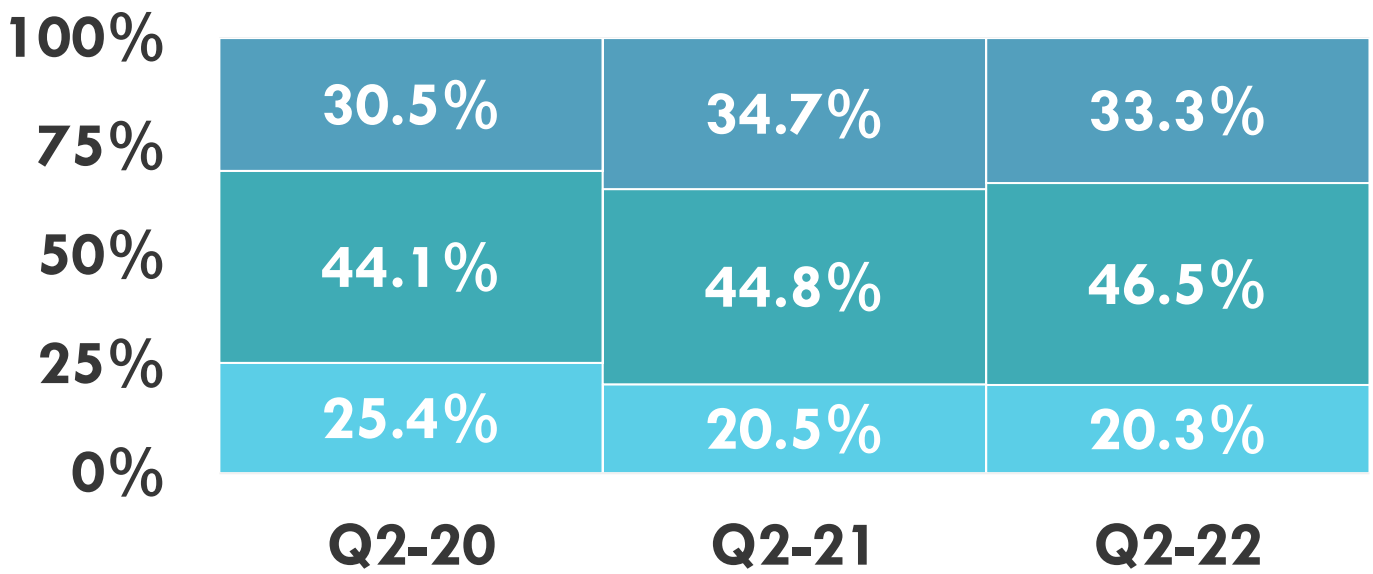


Percent Staying Overnight

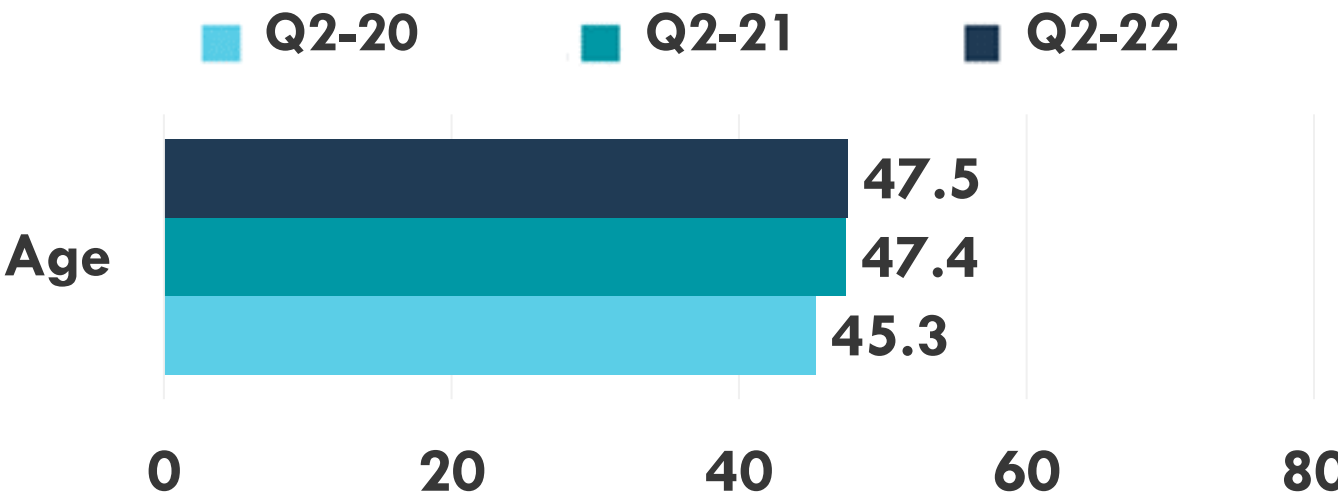


Generations

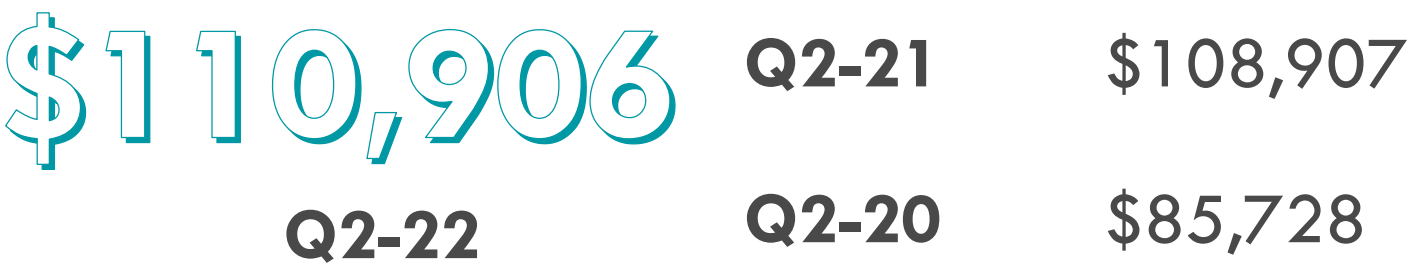
Millennial or younger Gen X Boomer or older



Average Age



Average Income



The background image shows the exterior of the Museum of Fine Arts St. Petersburg. The building is a large, classical-style structure with a portico supported by tall columns. A wide set of stone steps leads up to the entrance. Three large, colorful banners are hanging from the portico. The central banner features a cartoon illustration of a person in a small boat and the text 'Derrick Adams Buoyant September 12 - November 29 MUSEUM OF FINE ARTS ST. PETE'. To the left, a yellow banner reads 'MUSEUM OF FINE ARTS ST. PETERSBURG'. To the right, a pink banner shows a cartoon of a person sitting on a large, patterned object. The sky is clear and blue, and palm trees are visible in the upper corners. A teal vertical line is positioned to the left of the text.

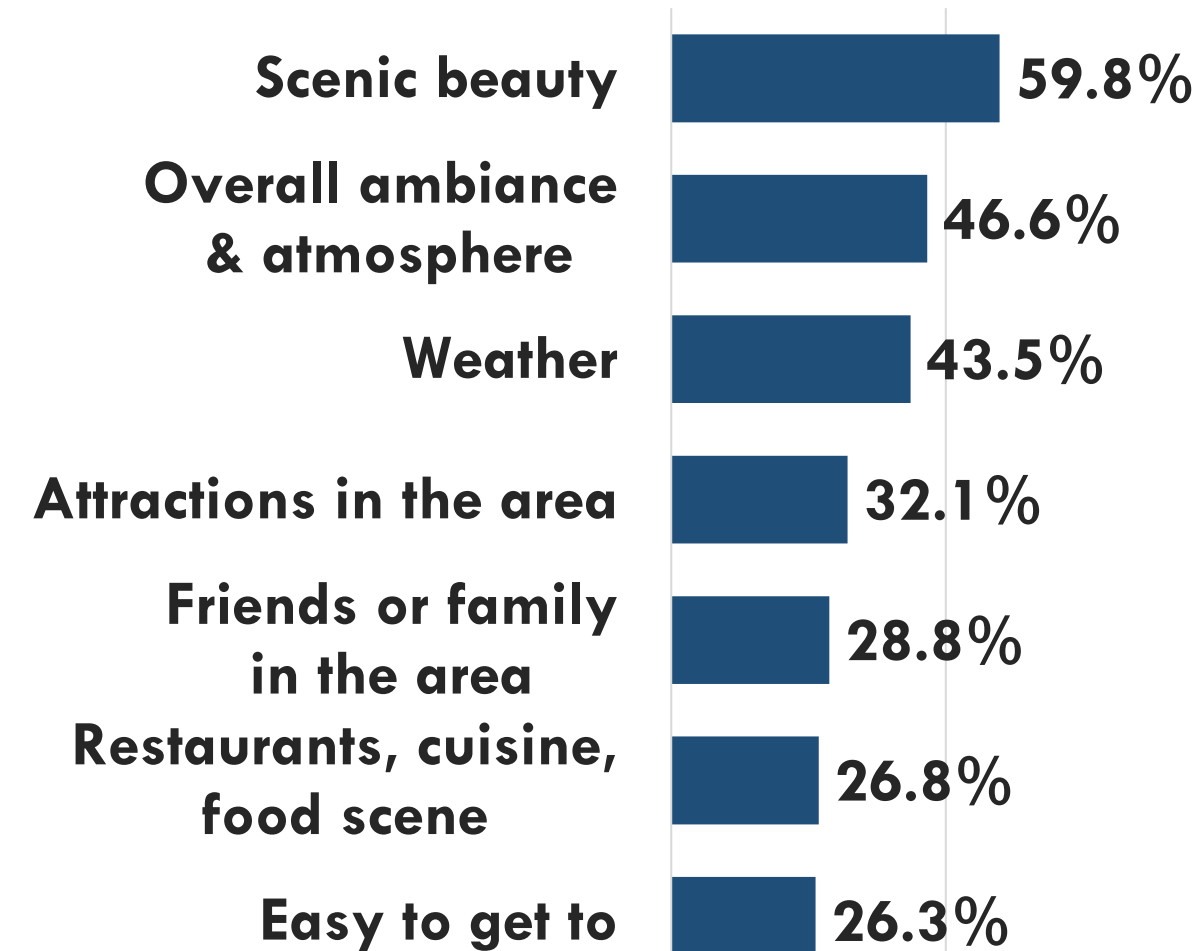
Q2 2022 Visitor Summaries by Traveler Segment

THE BEACH GO-ER

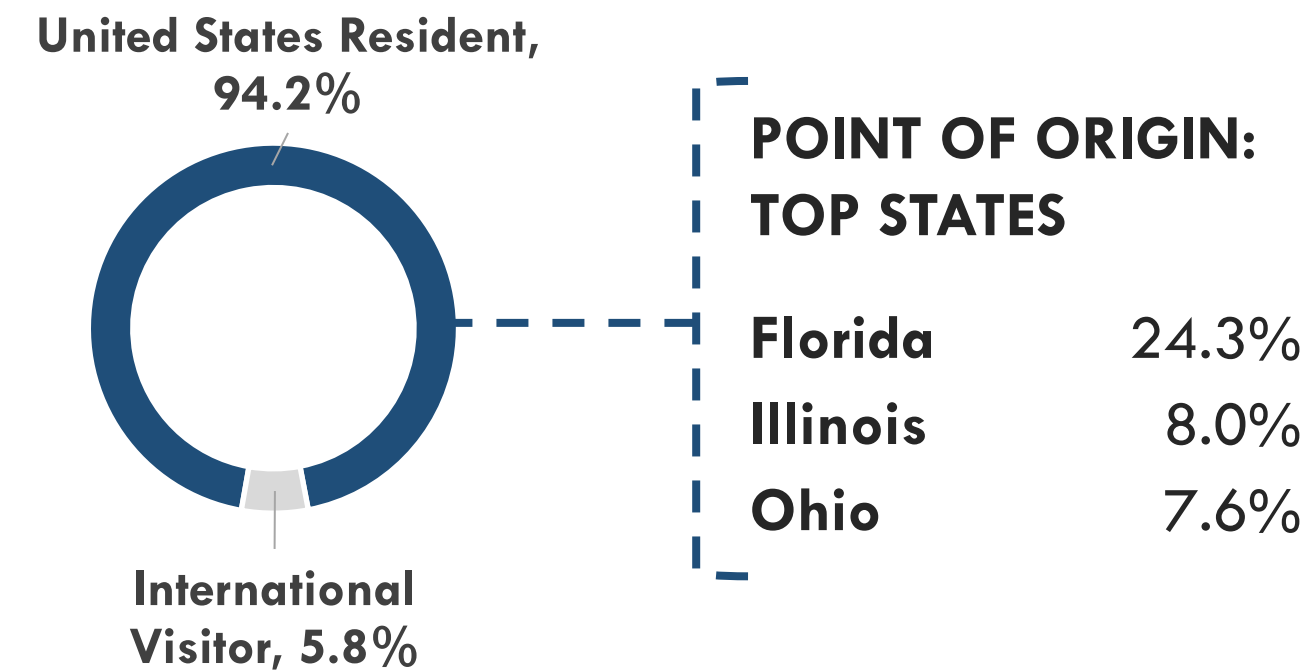
Q2 2022

Results presented here are reflective of visitors who said their primary motivation for visiting the St. Pete/Clearwater area was to visit beaches that suit their taste.

Factors Important to Destination Decision



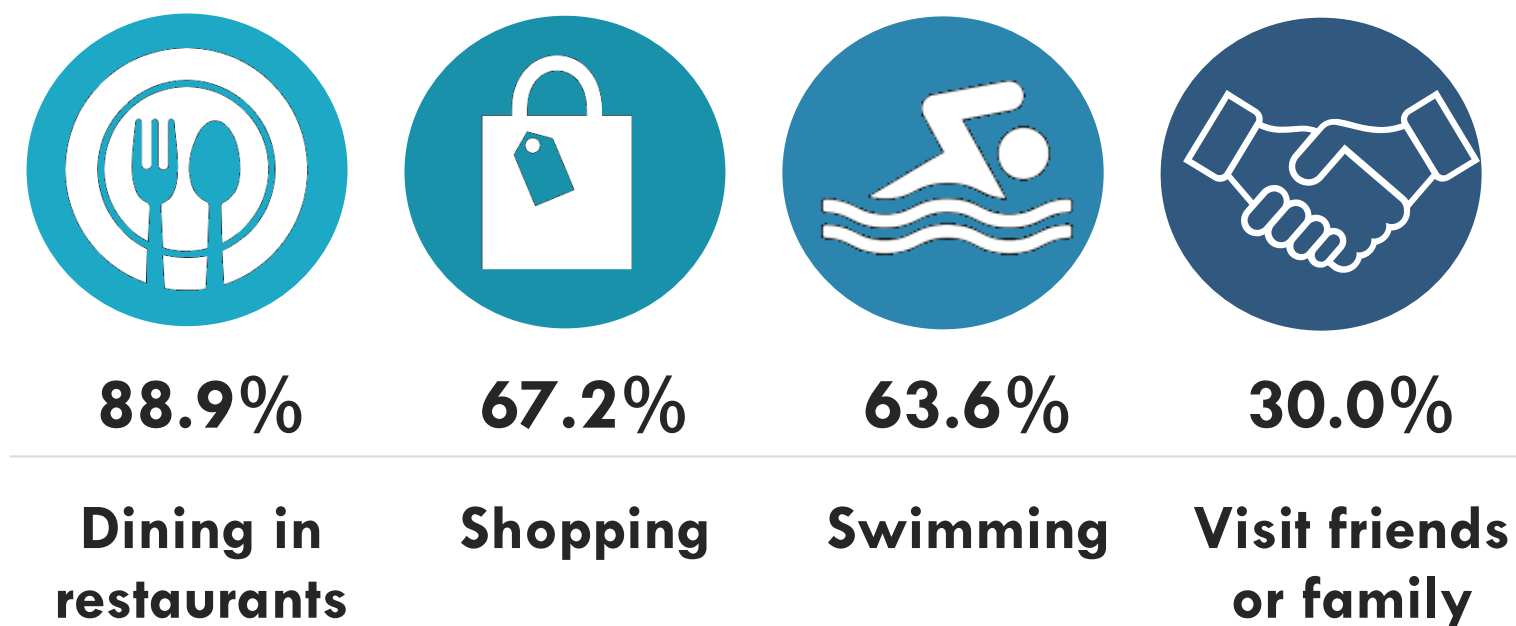
Domestic vs. International



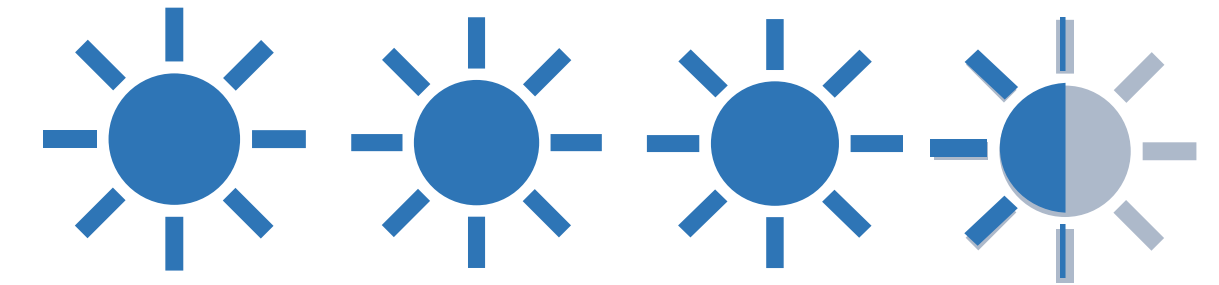
Top Communities Visited

Clearwater Beach	59.6%
Madeira Beach	43.4%
St. Petersburg	32.0%
Treasure Island	21.9%
St. Pete Beach	18.8%

Top Activities

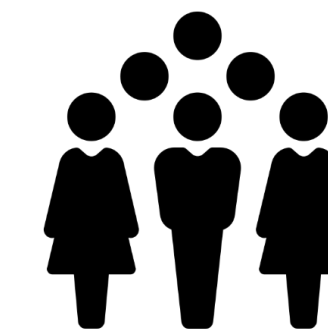


Length of Stay



3.5 Days on Average

Travel Party Size



3.1 People

28.6% Traveled with Children

Daily Spending



\$131.83
Per Person

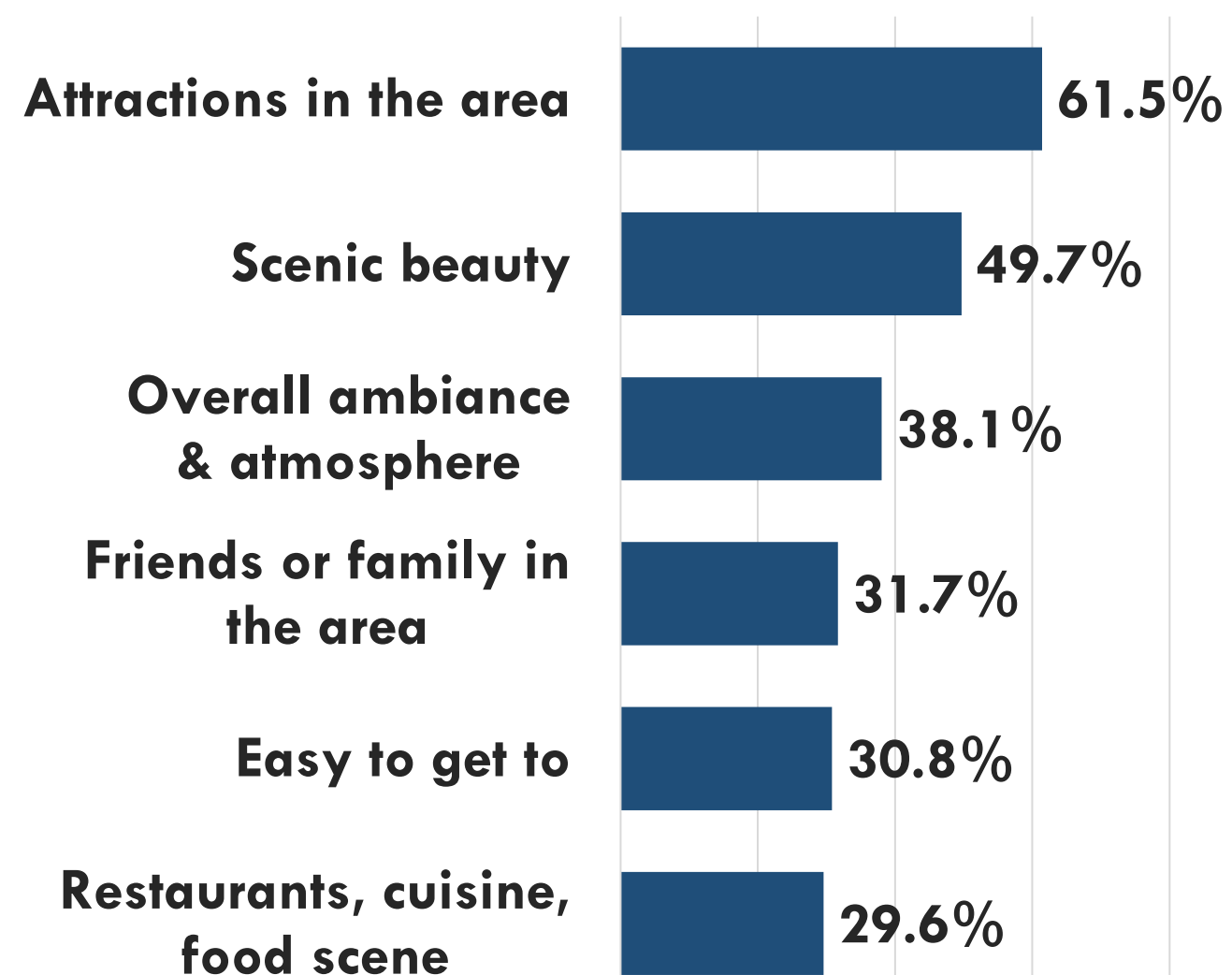


THE ARTS & CULTURE VISITOR

Q2 2022

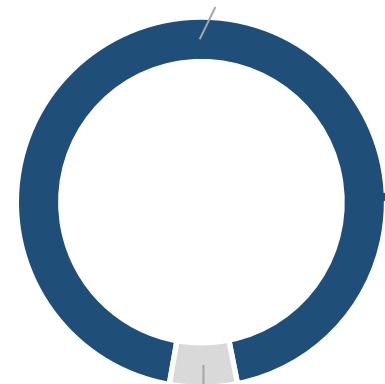
Results presented here are reflective of visitors who said their primary motivation for visiting the St. Pete/Clearwater area was to engage in arts and cultural offerings.

Factors Important to Destination Decision



Domestic vs. International

United States Resident,
94.1%



International
Visitor, 5.9%

POINT OF ORIGIN: TOP STATES

Florida	63.2%
Pennsylvania	4.0%
New York	3.7%

Top Communities Visited

St. Petersburg	98.4%
St. Pete Beach	9.9%
Madeira Beach	9.5%
Pass-A-Grille Beach	7.7%
Treasure Island	6.6%

Top Activities



89.5%

Dining in
restaurants



35.7%

Visit the
beach



33.9%

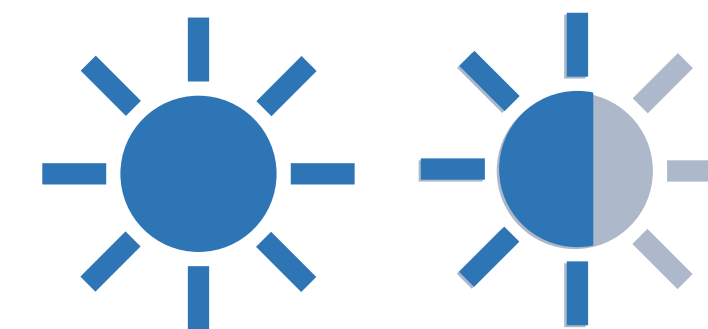
Visit friends
or family



24.8%

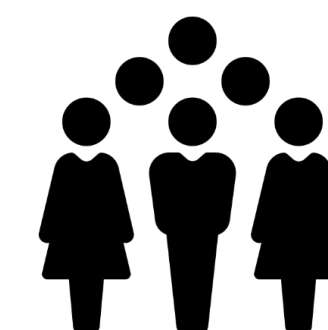
Shopping

Length of Stay



1.6 Days on Average

Travel Party Size



2.7 People

10.9% Traveled with Children

Daily Spending



\$101.86
Per Person

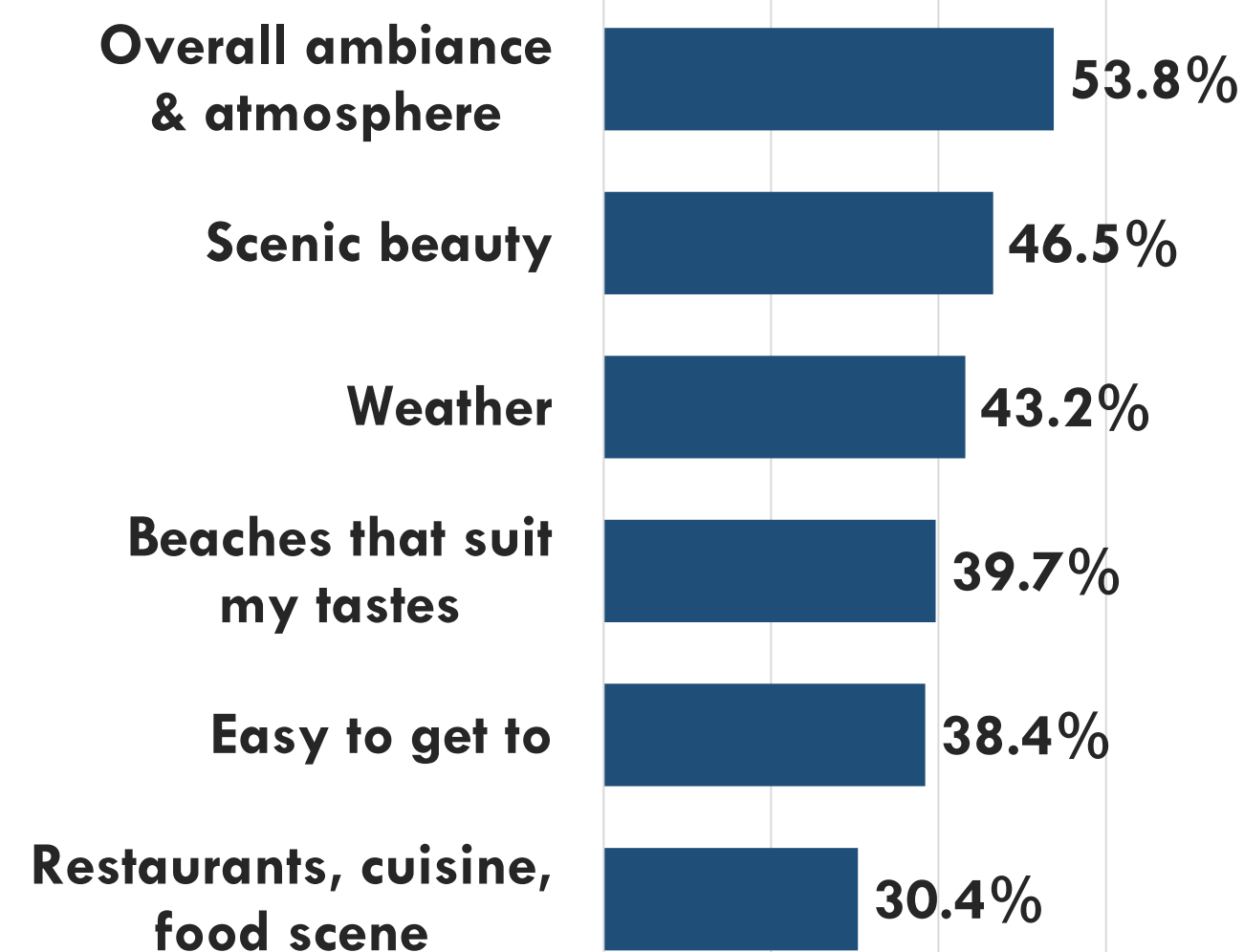


THE AFFLUENT VISITOR

Q2 2022

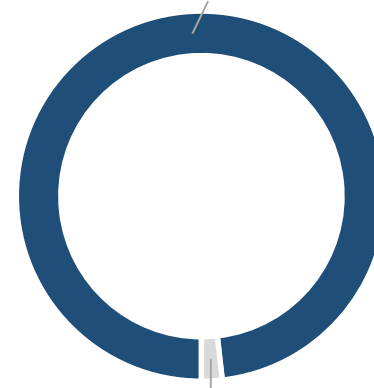
Results presented here are reflective of visitors who reported having an annual household income of \$150,000+

Factors Important to Destination Decision



Domestic vs. International

United States Resident,
98.2%



International
Visitor, 1.8%

POINT OF ORIGIN: TOP STATES

Florida	34.2%
Illinois	8.4%
New York	5.7%

Top Communities Visited

Madeira Beach	47.9%
St. Petersburg	46.7%
Clearwater Beach	27.3%
St. Pete Beach	25.6%
Treasure Island	23.9%

Top Activities



99.0%

Dining in
restaurants



79.5%

Visit the
beach



55.8%

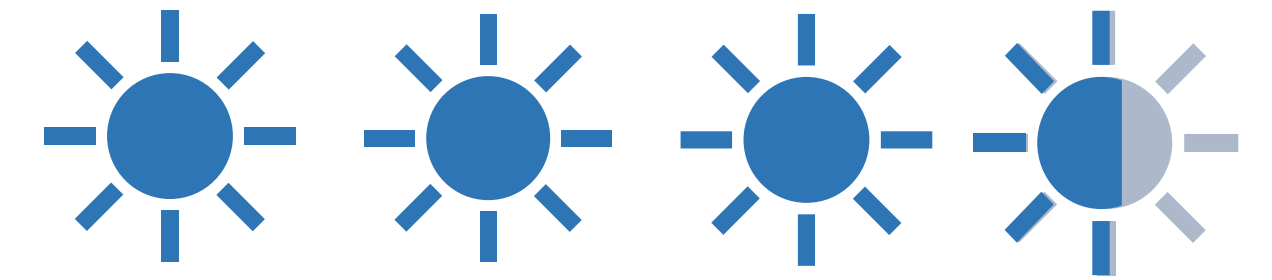
Shopping



50.1%

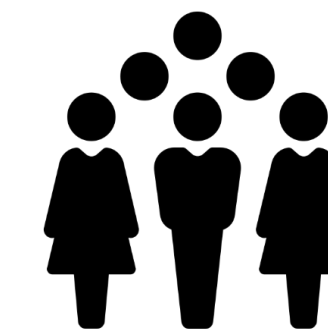
Swimming

Length of Stay



3.7 Days on Average

Travel Party Size



3.1 People

28.9% Traveled with Children

Daily Spending



\$139.84

Per Person

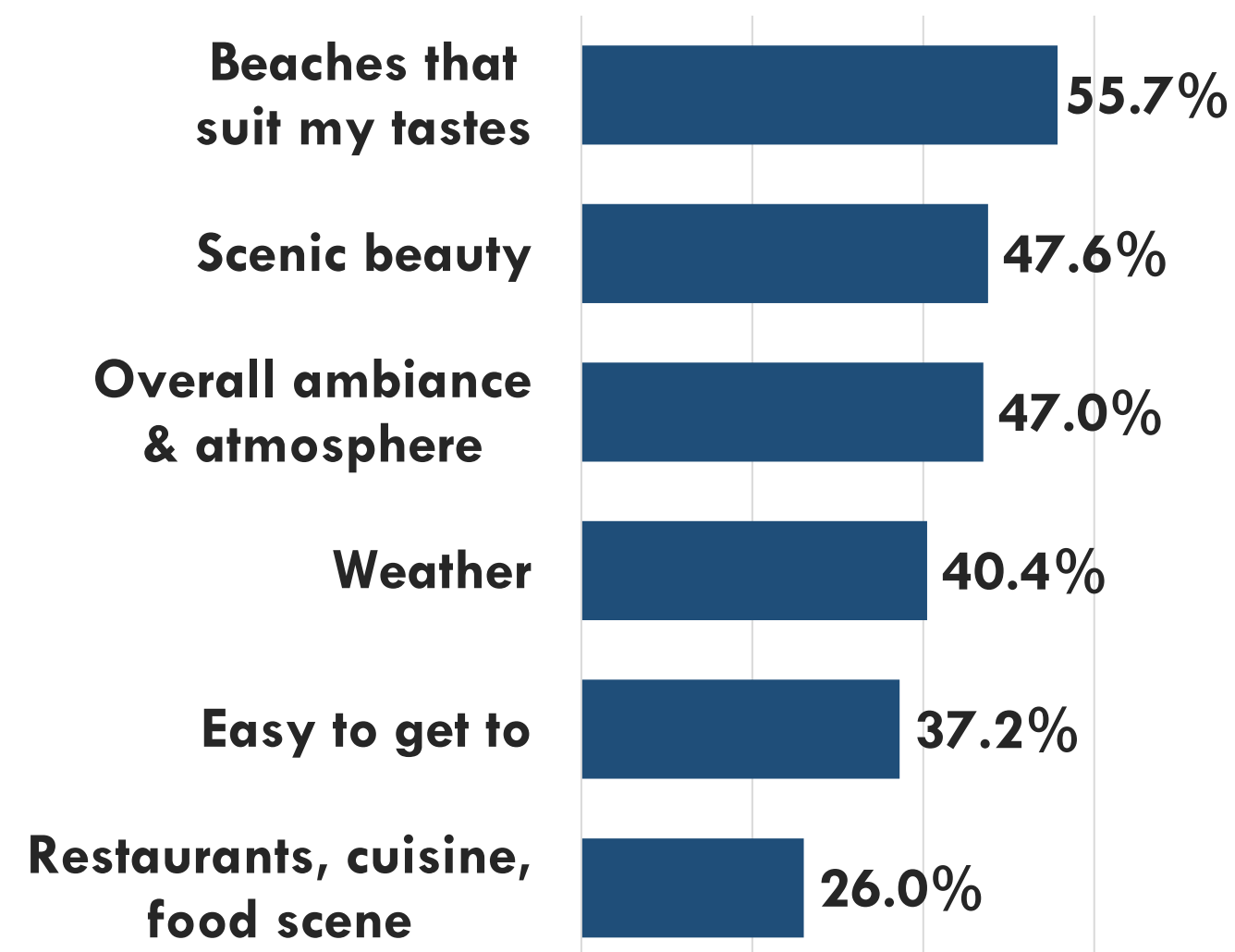


THE FAMILY TRAVELER

Q2 2022

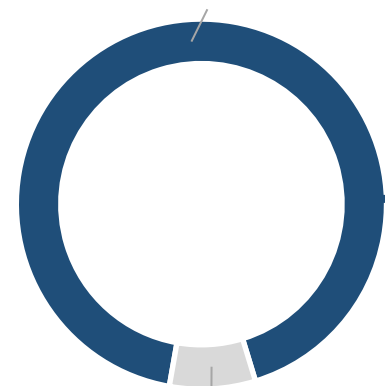
Results presented here are reflective of visitors who were visiting the St. Pete/Clearwater area with children under the age of 18

Factors Important to Destination Decision



Domestic vs. International

United States Resident,
92.5%



International
Visitor, 7.5%

POINT OF ORIGIN: TOP STATES

Florida	23.2%
Illinois	8.4%
Ohio	6.8%

Top Communities Visited

Madeira Beach	50.9%
Clearwater Beach	47.5%
St. Petersburg	30.5%
Treasure Island	23.6%
St. Pete Beach	19.0%

Top Activities



89.7%

Dining in
restaurants



84.7%

Visit the
beach



71.1%

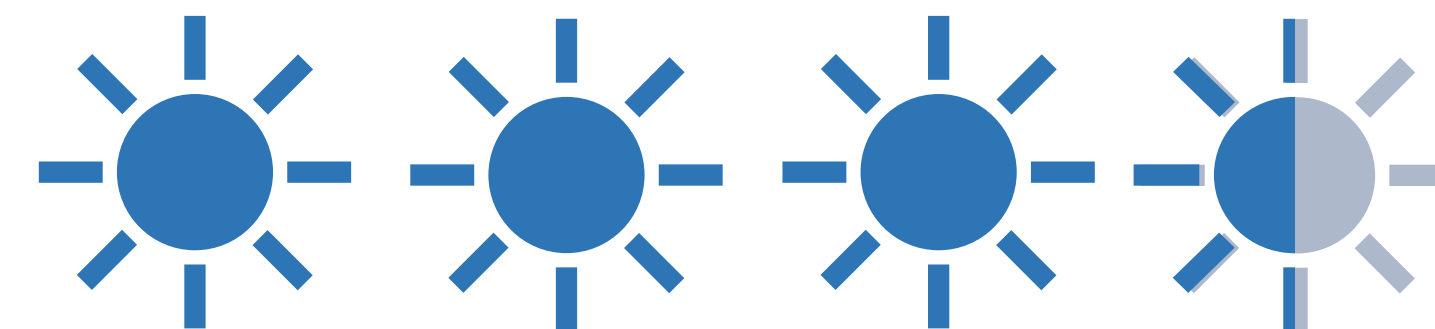
Shopping



60.1%

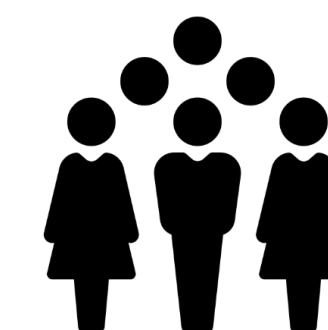
Swimming

Length of Stay



3.5 Days on Average

Travel Party Size



4.4 People

100% Traveled with Children

Daily Spending



\$94.90
Per Person



A scenic view of a park with palm trees, a wooden walkway, and a body of water. The walkway leads from the foreground towards the water, flanked by lush greenery and palm trees. The water is calm, and the sky is clear. The overall atmosphere is peaceful and inviting.

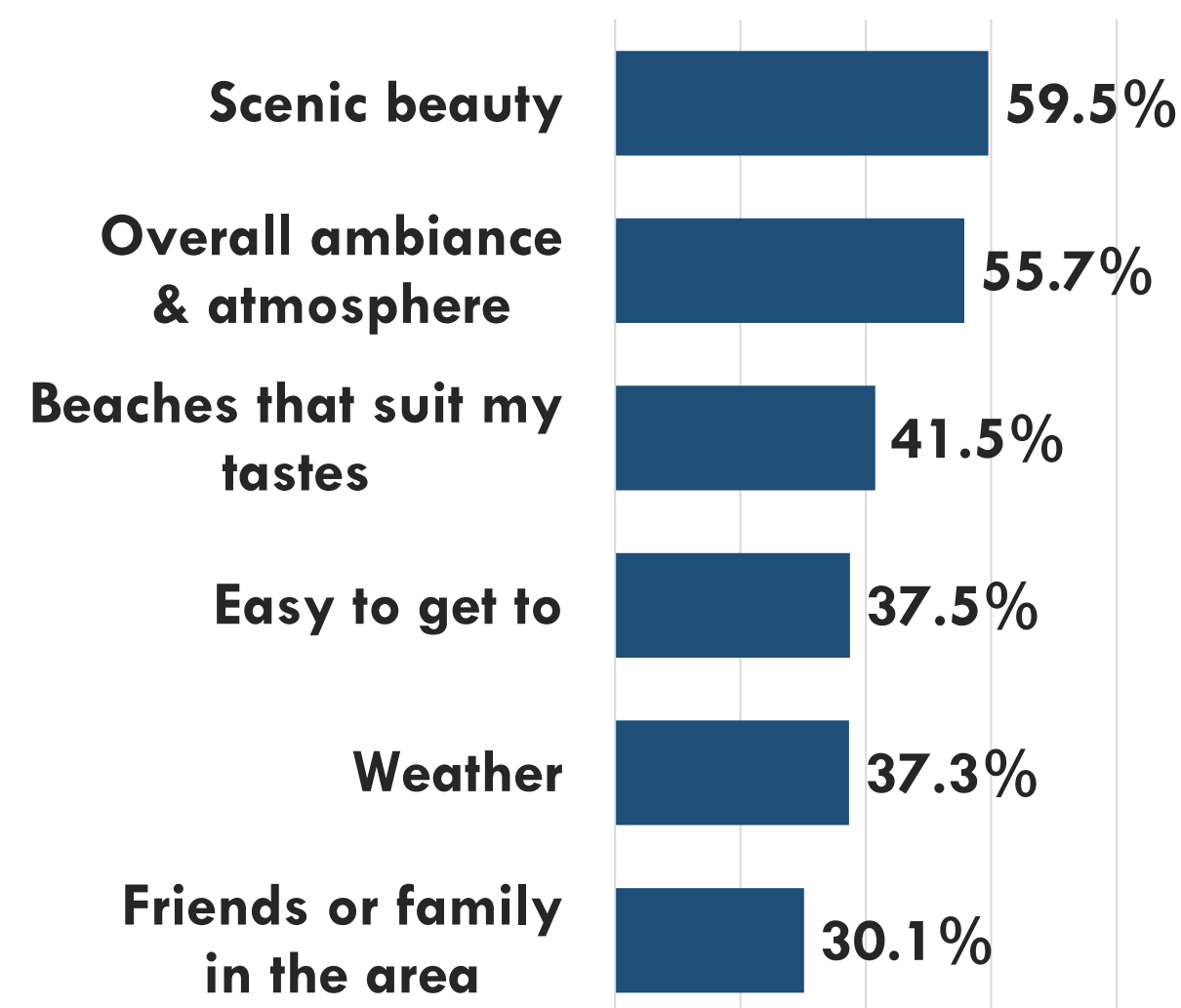
Q2 2022 Visitor Summaries by Generation

THE MILLENNIAL VISITOR

Q2 2022

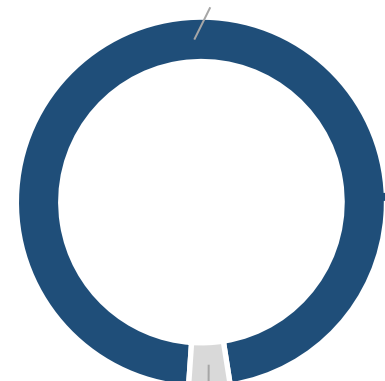
Results presented here are reflective of visitors between the age of 22-40.

Factors Important to Destination Decision



Domestic vs. International

United States Resident,
96.4%



International
Visitor, 3.6%

POINT OF ORIGIN: TOP STATES

Florida	36.4%
Ohio	7.4%
Illinois	5.9%
Indiana	5.9%

Top Communities Visited

Madeira Beach	48.5%
St. Petersburg	40.9%
Clearwater Beach	33.0%
Treasure Island	19.6%
St. Pete Beach	19.4%

Top Activities



94.9%

Dining in
restaurants



72.7%

Visit the
beach



52.5%

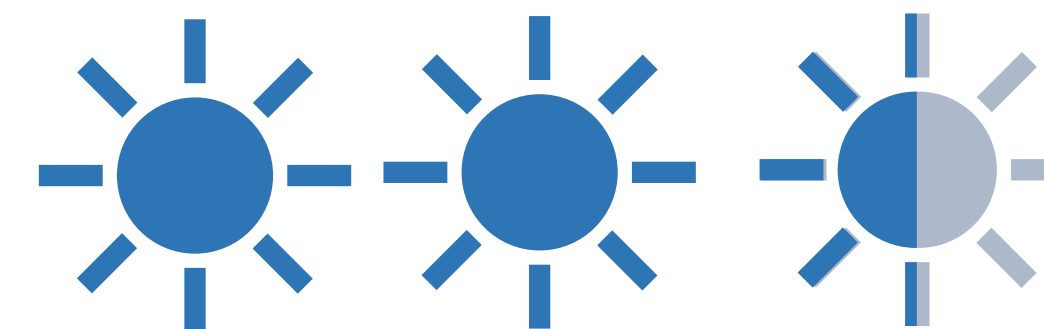
Shopping



42.7%

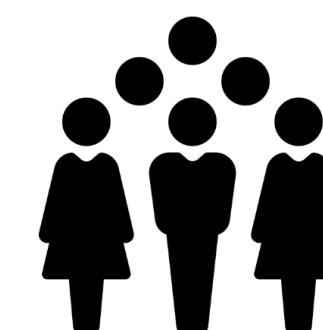
Swimming

Length of Stay



2.5 Days on Average

Travel Party Size



2.5 People

13.8% Traveled with Children

Daily Spending



\$116.42
Per Person

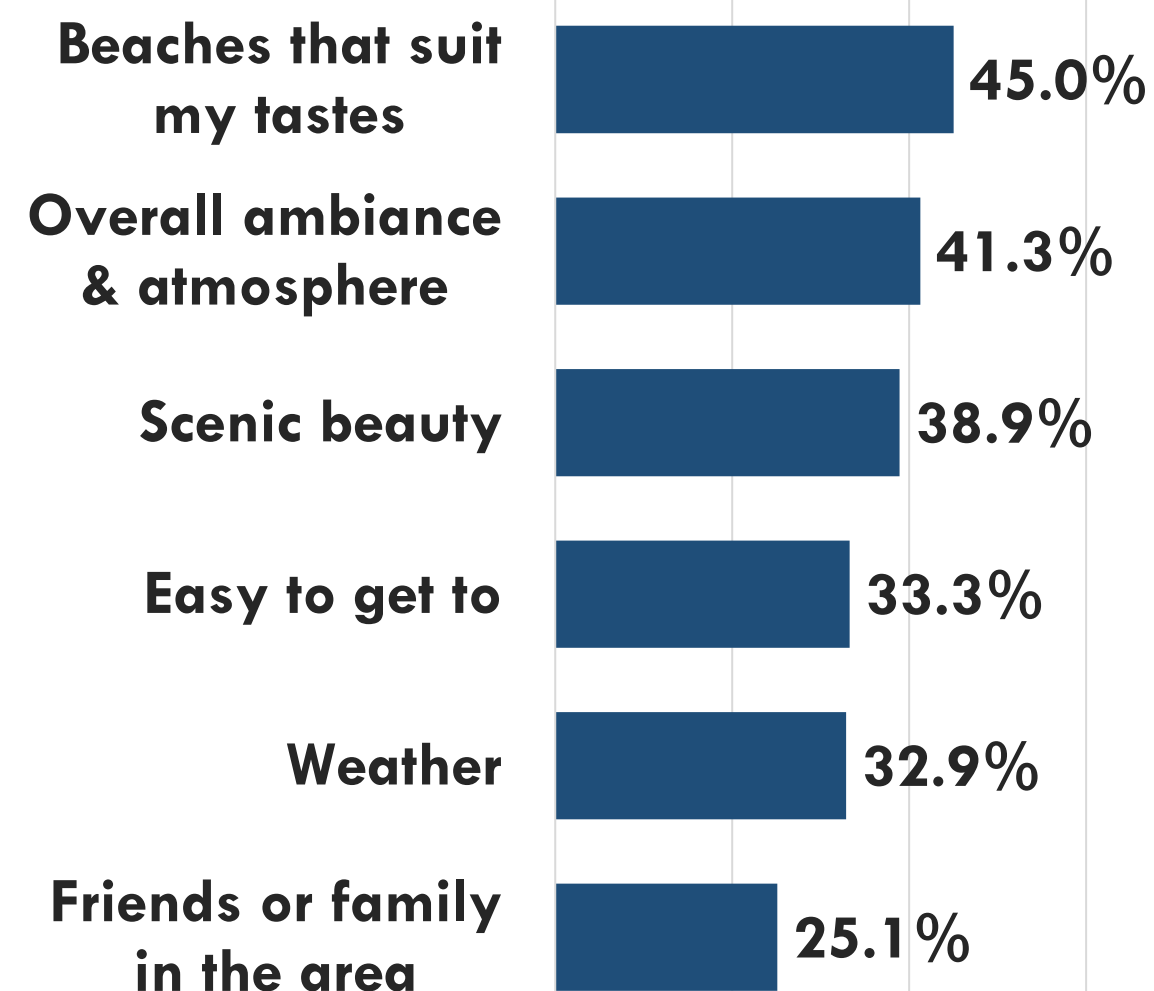


THE GEN X VISITOR

Q2 2022

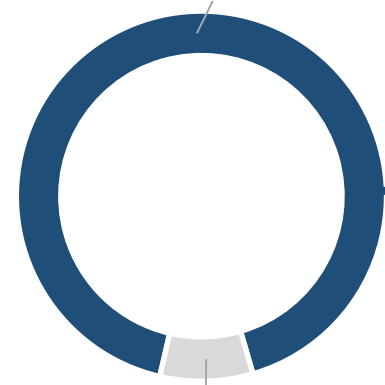
Results presented here are reflective of visitors between the age of 41-57.

Factors Important to Destination Decision



Domestic vs. International

United States Resident,
91.9%



International
Visitor, 8.1%

POINT OF ORIGIN: TOP STATES

Florida	29.3%
Ohio	7.0%
Illinois	5.5%

Top Communities Visited

Clearwater Beach	51.1%
Madeira Beach	42.3%
St. Petersburg	28.6%
Treasure Island	17.5%
St. Pete Beach	17.1%

Top Activities



87.4%

Dining in
restaurants



81.3%

Visit the
beach



66.1%

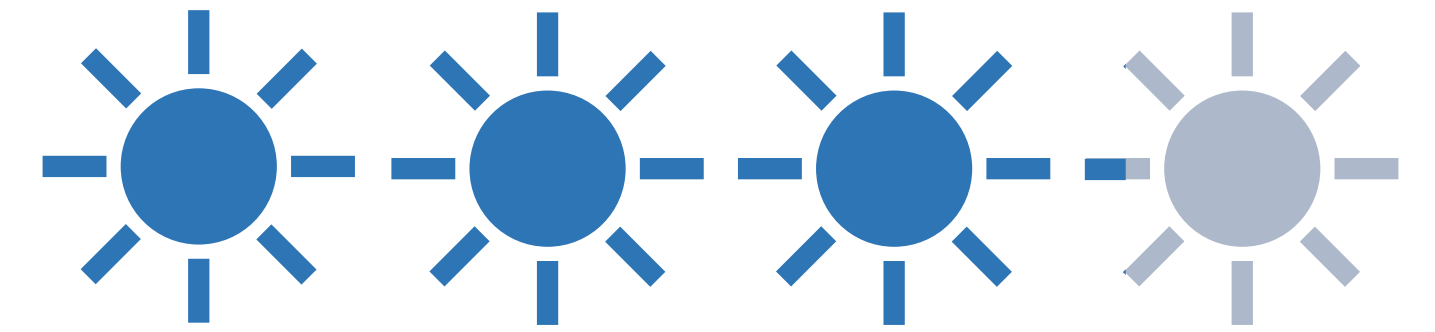
Shopping



50.9%

Swimming

Length of Stay



3.1 Days on Average

Travel Party Size



2.9 People

36.3% Traveled with Children

Daily Spending



\$117.71

Per Person

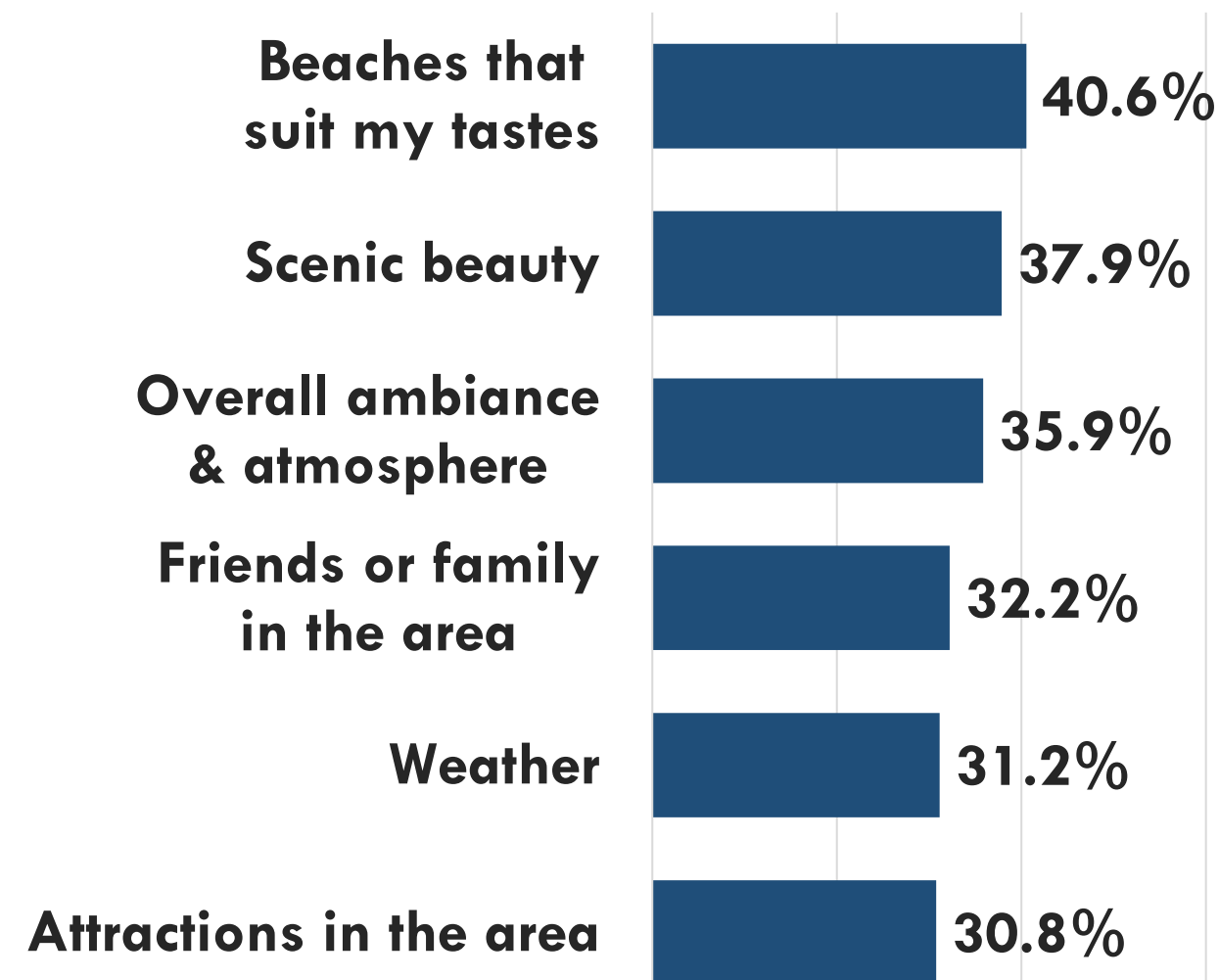


THE BABY BOOMER VISITOR

Q2 2022

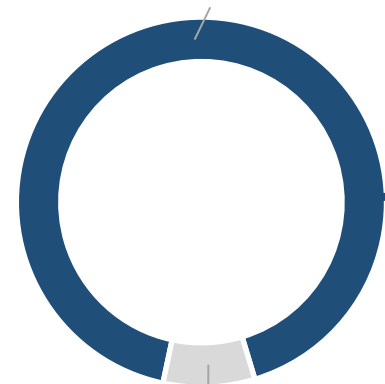
Results presented here are reflective of visitors between the age of 58-76.

Factors Important to Destination Decision



Domestic vs. International

United States Resident,
92.0%



International
Visitor, 8.0%

POINT OF ORIGIN: TOP STATES

Florida	40.2%
New York	5.6%
Ohio	5.1%

Top Communities Visited

St. Petersburg	44.2%
Clearwater Beach	39.6%
Madeira Beach	33.5%
Treasure Island	13.3%
St. Pete Beach	13.0%

Top Activities



91.8%

Dining in
restaurants



68.7%

Visit the
beach



55.0%

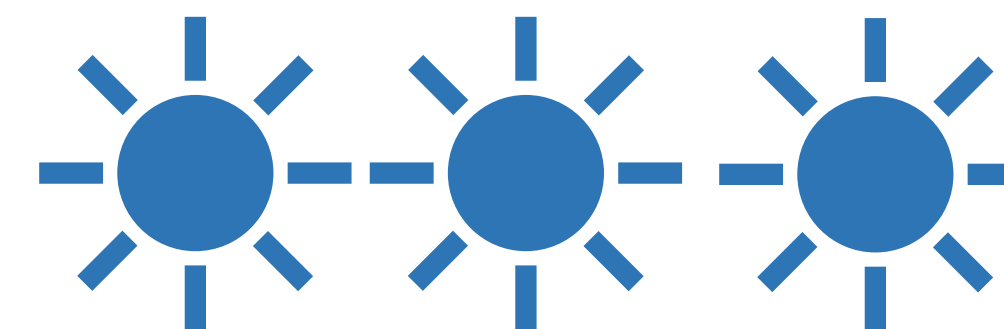
Shopping



40.4%

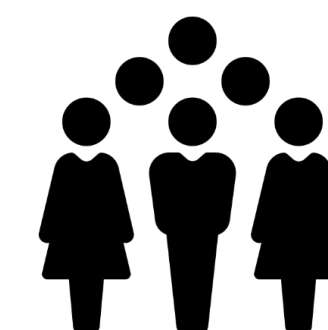
Swimming

Length of Stay



3.0 Days on Average

Travel Party Size



2.5 People

6.6% Traveled with Children

Daily Spending



130.93

Per Person





Planning the St. Pete / Clearwater Trip

WHEN DECISION TO VISIT WAS MADE

The typical St. Pete/Clearwater visitors decided to visit Pinellas County approximately 9.3 weeks (65.1 days) prior to their actual arrival date – up from 7.7 weeks (53.7 days) in Q2 2021. Hotel guests made the decision to visit an average of 3.5 months in advance (104.9 days), just slightly up from 3 months (90.3 days) in Q2 2021. VFRs decided 89.4 days (3 months) in advance – up from 58.5 days (1.1 months) in Q2, 2021, while day trippers made the decision 35.0 days in advance, nearly the same as in Q2 2021 (32.3 days).

Figure 1: Average Time Between Decision to Visit and Arrival

65.1 Days
in Advance



Detail by Type of Visitor

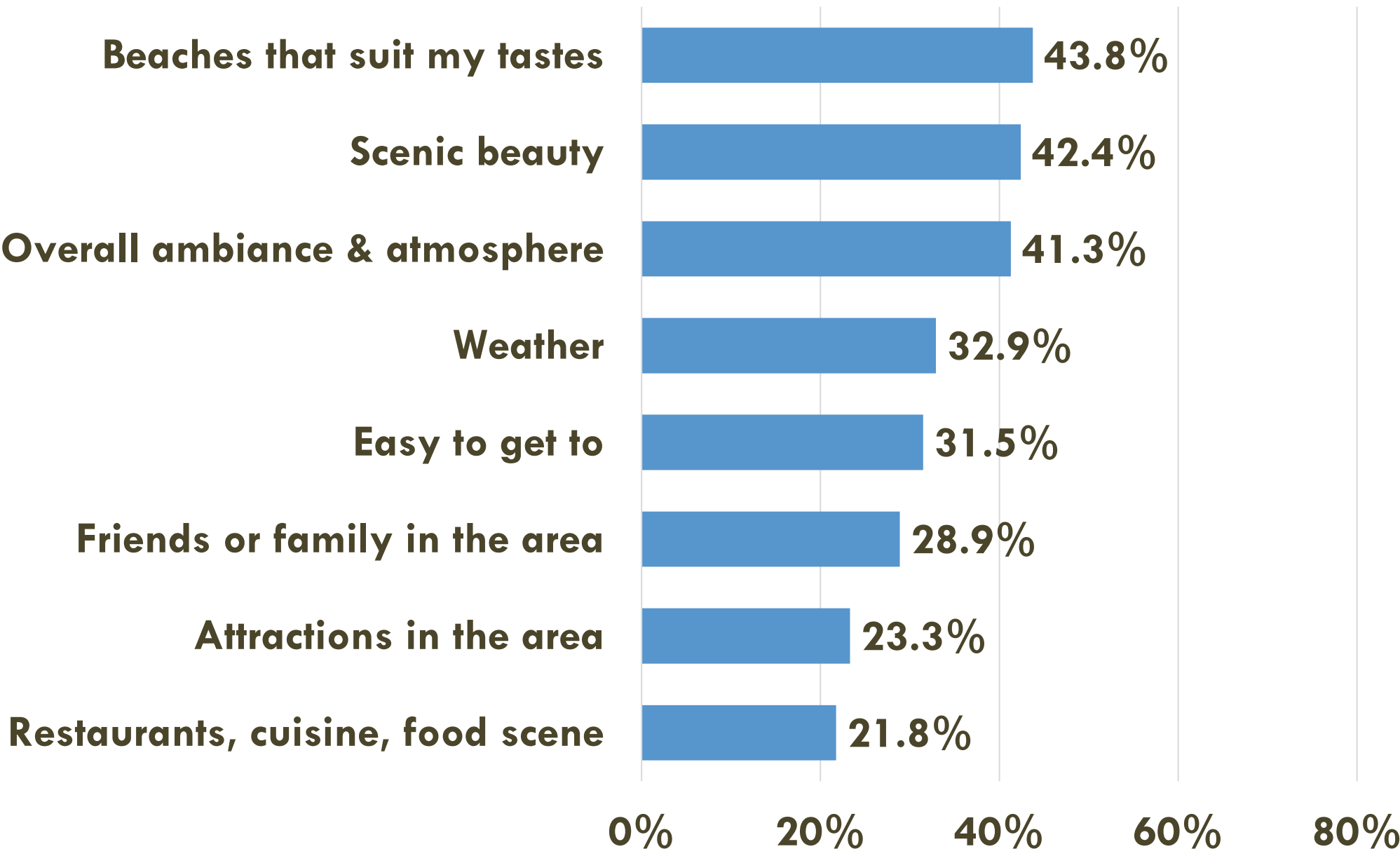
	Hotel	VFR	Day Trip
Average Days	104.9	89.4	35.0
Sample Size:	391	175	286

Question: Approximately how many days before you arrived did you make the decision to visit the St. Pete/Clearwater area for this trip? Base: All Respondents. 1,225 responses.

IMPORTANT FACTORS TO DESTINATION DECISION

As in Q2 2021, the top two factors driving visitation to the St. Pete/Clearwater area in Q2 2022 were beaches (43.8%) and scenic beauty (42.4%). These were closely followed by overall ambiance & atmosphere (41.3%), weather (32.9%), easy to get to (31.5%), friends or family in the area (28.9%), attractions (23.3%) and restaurants, cuisine, food scene (21.8%). Full detail on all factors tested is presented on the next page.

Figure 2: Important to Decision to Visit



Question: Which of the following were IMPORTANT to your decision to take this trip to the St. Pete/Clearwater area? (Select all that apply) Base: All Respondents. 1,193 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Beaches that suit my tastes	57.5%	34.7%	38.6%
Scenic beauty	47.1%	35.9%	37.8%
Overall ambiance & atmosphere	52.3%	32.0%	32.3%
Weather	51.1%	48.4%	16.6%
Easy to get to	22.5%	24.7%	32.9%
Friends or family in the area	14.7%	73.2%	29.8%
Attractions in the area	26.4%	16.7%	24.1%
Restaurants, cuisine, food scene	24.9%	17.7%	19.0%
Sample Size:	365	175	279

IMPORTANT FACTORS TO DESTINATION DECISION – FULL DETAIL

	Total	Hotel	VFR	Day Trip
Beaches that suit my tastes	43.8%	57.5%	34.7%	38.6%
Scenic beauty	42.4%	47.1%	35.9%	37.8%
Overall ambiance & atmosphere	41.3%	52.3%	32.0%	32.3%
Weather	32.9%	51.1%	48.4%	16.6%
Easy to get to	31.5%	22.5%	24.7%	32.9%
Friends or family in the area	28.9%	14.7%	73.2%	29.8%
Attractions in the area	23.3%	26.4%	16.7%	24.1%
Restaurants, cuisine, food scene	21.8%	24.9%	17.7%	19.0%
Recommendation from people I know	17.9%	20.5%	13.6%	14.5%
Arts & cultural offerings	15.6%	8.5%	7.0%	20.8%
Shopping opportunities	11.7%	13.4%	5.7%	12.0%
Outdoor recreational opportunities	9.7%	13.3%	11.0%	7.6%
St. Pete Pier	8.3%	4.6%	6.6%	10.9%
The area's unique culture	5.6%	6.2%	4.8%	5.7%
Special event(s) and/or festival(s)	5.0%	4.9%	2.7%	6.3%
Appealing hotels/resorts and other lodging options	4.6%	14.8%	2.6%	0.7%
The St.Pete/Clearwater area is family-friendly	4.1%	7.3%	2.9%	3.1%
Fishing opportunities	2.7%	1.1%	2.4%	2.7%
Articles, features, reviews, etc. about the area	2.5%	5.0%	0.7%	1.7%
The St.Pete/Clearwater area is romantic	1.7%	5.6%	1.7%	0.6%
Good deal on airfare	1.6%	2.7%	1.9%	0.6%
Good hotel rate	1.5%	6.8%	0.7%	0.0%
A specific attraction:	1.5%	2.8%	0.5%	1.4%
Lifelong desire to visit	1.2%	3.4%	0.5%	0.7%
Breweries/Distilleries/Craft beer scene	1.1%	1.1%	2.8%	0.7%
Sports or sporting events	0.6%	0.2%	1.9%	0.3%
Golf	0.5%	0.6%	0.7%	0.3%
Advertisements for the area	0.4%	0.2%	0.7%	0.4%
Base	1,193	365	175	279

Differences seen amongst visitor types:

- Across all segments, hotel guests were the likeliest to say that Pinellas beaches (57.5%), scenic beauty (47.1%) and overall ambiance (52.3%) were the most important factors when deciding to visit the St. Pete/Clearwater area.
- While family & friends in the area were obviously the driving factors for VFRs to visit the destination, day trippers said that arts & cultural offerings (20.8%), the St. Pete Pier (10.9%) and special events (6.3%) were important to their decision to visit St. Pete/Clearwater.

Question: Which of the following were IMPORTANT to your decision to take this trip to the St. Pete/Clearwater area? (Select all that apply) Base: All Respondents. 1,193 responses.

TRAVEL PLANNING RESOURCES USED

Respondents cited user-generated content/review websites, social media content and opinions of friends or relatives to be the most utilized travel planning resources in Q2 2022.

Compared to Q2 2021, usage of the official Visit St. Pete/Clearwater website saw a slight decrease before arrival, from 29.3 percent to 24.1 percent in Q2 2022. In-market usage also decreased from 3.7 percent in Q2 2021 to 0.9 percent in Q2 2022. Hotel guests, VFRs and day trippers were nearly equally inclined to use www.VisitStPeteClearwater.com as a travel planning resource prior to arrival (21.3%, 23.3% and 20.8%, respectively).

Figure 3: Resources Used before Arrival and While In Market

	Used Before Arrival	Used In-Market
User-generated content/Review websites, such as Yelp and TripAdvisor	41.2%	21.8%
Social Media content	38.4%	33.9%
Opinions of friends or relatives	35.9%	21.8%
Online travel agencies	31.2%	0.2%
www.VisitStPeteClearwater.com	24.1%	0.9%
Travel guides, brochures	7.0%	6.9%
Television programming	3.2%	0.6%
Radio programming	2.1%	0.5%
Travel agency (traditional, offline)	1.6%	0.1%
YouTube or other online videos	1.0%	0.3%
Newspaper travel section	0.7%	0.5%
Lifestyle or travel magazines	0.5%	0.1%
Gulf to Bay St Pete/Clearwater Destination Magazine	0.2%	0.3%

Question: Which of the following resources did you use to plan your trip to the St. Pete/Clearwater area BEFORE you arrived, and which did you (or do you plan to) use while IN the area for this trip? (Select all that apply.) Base: All Respondents. 1,125 responses.

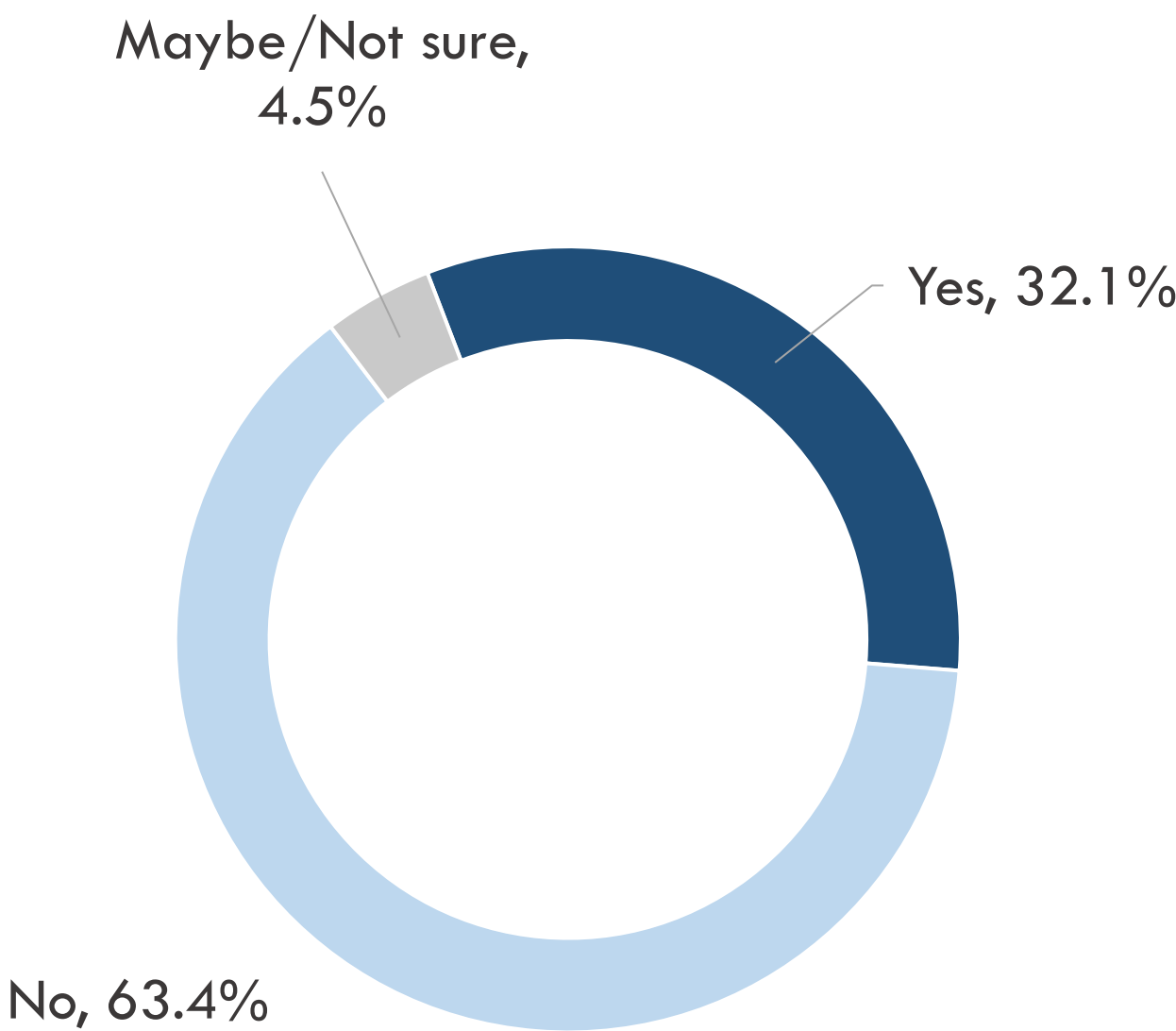
Detail by Traveler Segment

	Hotel		VFR		Day Trip	
	Pre-Arrival	In-Market	Pre-Arrival	In-Market	Pre-Arrival	In-Market
User-generated content/Review websites, such as Yelp and TripAdvisor	58.7%	41.9%	45.5%	35.6%	33.6%	11.2%
Social Media content	33.7%	31.3%	39.2%	37.1%	35.2%	29.4%
Opinions of friends or relatives	34.5%	15.2%	54.0%	41.7%	37.2%	22.7%
Online travel agencies	47.4%	0.7%	32.2%	0.0%	24.9%	0.0%
www.VisitStPeteClearwater.com	21.3%	3.0%	23.3%	0.9%	20.8%	0.0%
Travel guides, brochures	11.5%	15.6%	4.4%	7.2%	6.3%	3.1%
Television programming	2.2%	0.9%	1.4%	1.9%	4.3%	0.0%
Radio programming	0.6%	0.2%	0.4%	0.9%	3.0%	0.3%
Travel agency (traditional, offline)	3.0%	0.2%	0.0%	0.7%	1.6%	0.0%
YouTube or other online videos	2.9%	0.6%	0.9%	1.1%	0.3%	0.0%
Newspaper travel section	0.2%	0.4%	0.7%	0.9%	1.1%	0.3%
Lifestyle or travel magazines	0.6%	0.0%	0.0%	0.7%	0.6%	0.0%
Gulf to Bay St Pete/Clearwater Destination Magazine	1.3%	1.5%	0.0%	0.7%	0.0%	0.0%
Sample Size:	391		175		286	

EARNED & PAID MEDIA RECALL

One-third of responding visitors in Q2 2022 recalled seeing, hearing or reading earned media or advertisements/promotions for St. Pete/Clearwater in the past six months **32.1% – down from 48.1% in Q2 2021**). 30.8 percent of hotel guests recalled paid media for the area (down from 48.1% in Q2 2021), while similar proportions of day trippers (35.3% – down from 52.7% in Q2 2021) and VFRs (32.2% – up from 25.5% in Q2 2021) said they recalled media for the destination.

Figure 4: Media Recall



Question: In the last six months, have you seen, read, or heard any travel stories, advertising, or promotions for the St. Pete/Clearwater area? Base: All Respondents 1,221 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Yes	30.8%	32.2%	35.3%
No	65.4%	64.5%	60.0%
Maybe/Not sure	3.8%	3.3%	4.8%
Sample Size:	389	174	284

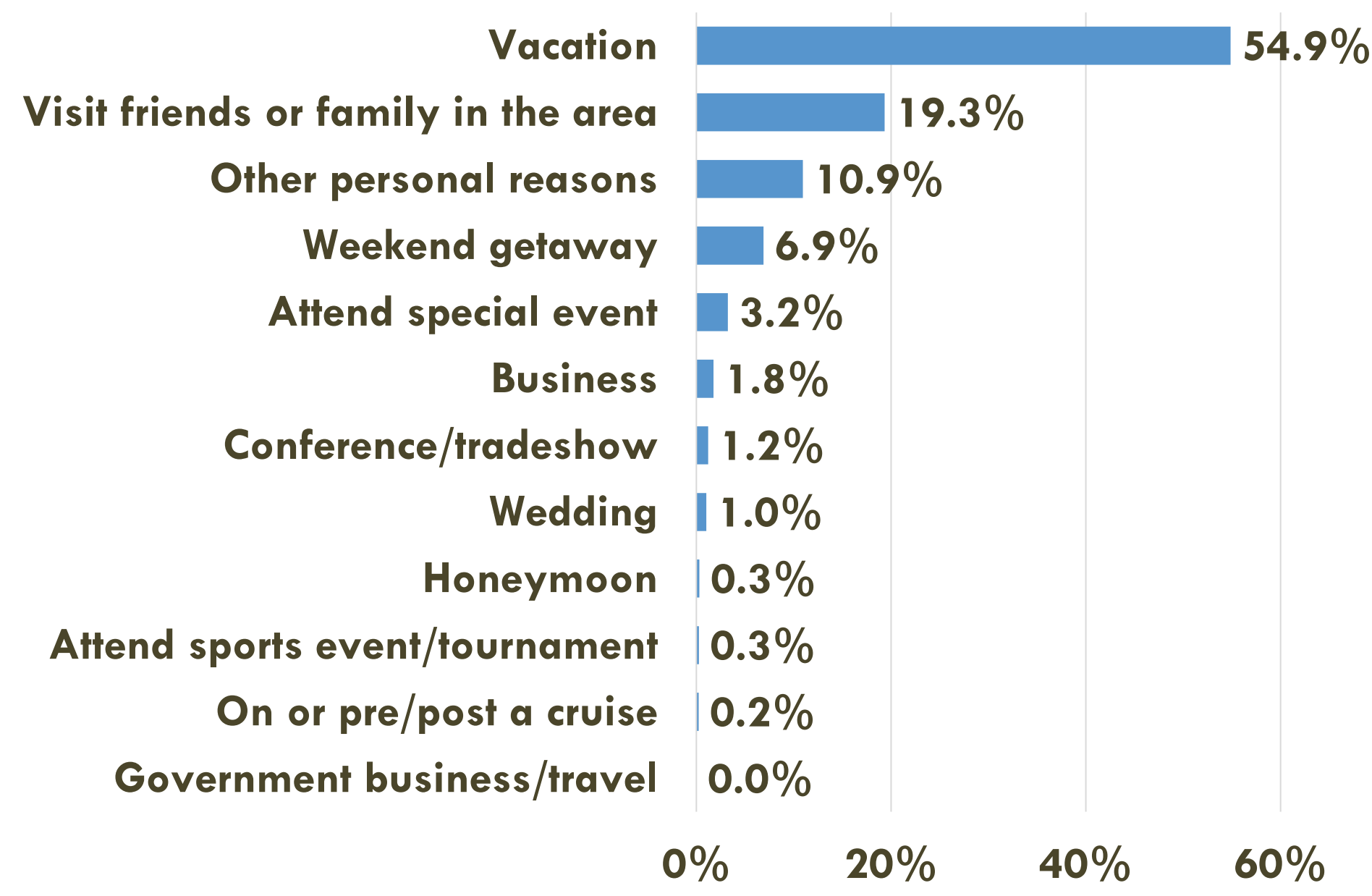
A photograph of a modern building with a glass dome and palm trees at dusk. The building has a large, illuminated glass dome structure. Several tall palm trees are visible in the foreground and background. The sky is a deep blue. The text "Visitor Trip Details" is overlaid in white, with a vertical teal line to its left.

Visitor Trip Details

PRIMARY REASON FOR VISIT

In Q2 2022, vacation was again the primary reason for a visit to St. Pete/Clearwater (54.9%). Compared to last year a slightly higher percentage of respondents visited family or friends in the area (19.3% vs. 15.6% in Q2 2021), 10.9 percent were in the destination for other personal reasons and 6.9 percent chose St. Pete/Clearwater for a weekend getaway. Three-quarters of hotel guests characterized their St. Pete/Clearwater trip as a vacation (75.5%). Day trippers were again the likeliest segment to be in the area for other personal reasons (17.3%)

or to attend a special event (5.5%)
Figure 5: Primary Reason for Visit



Detail by Traveler Segment

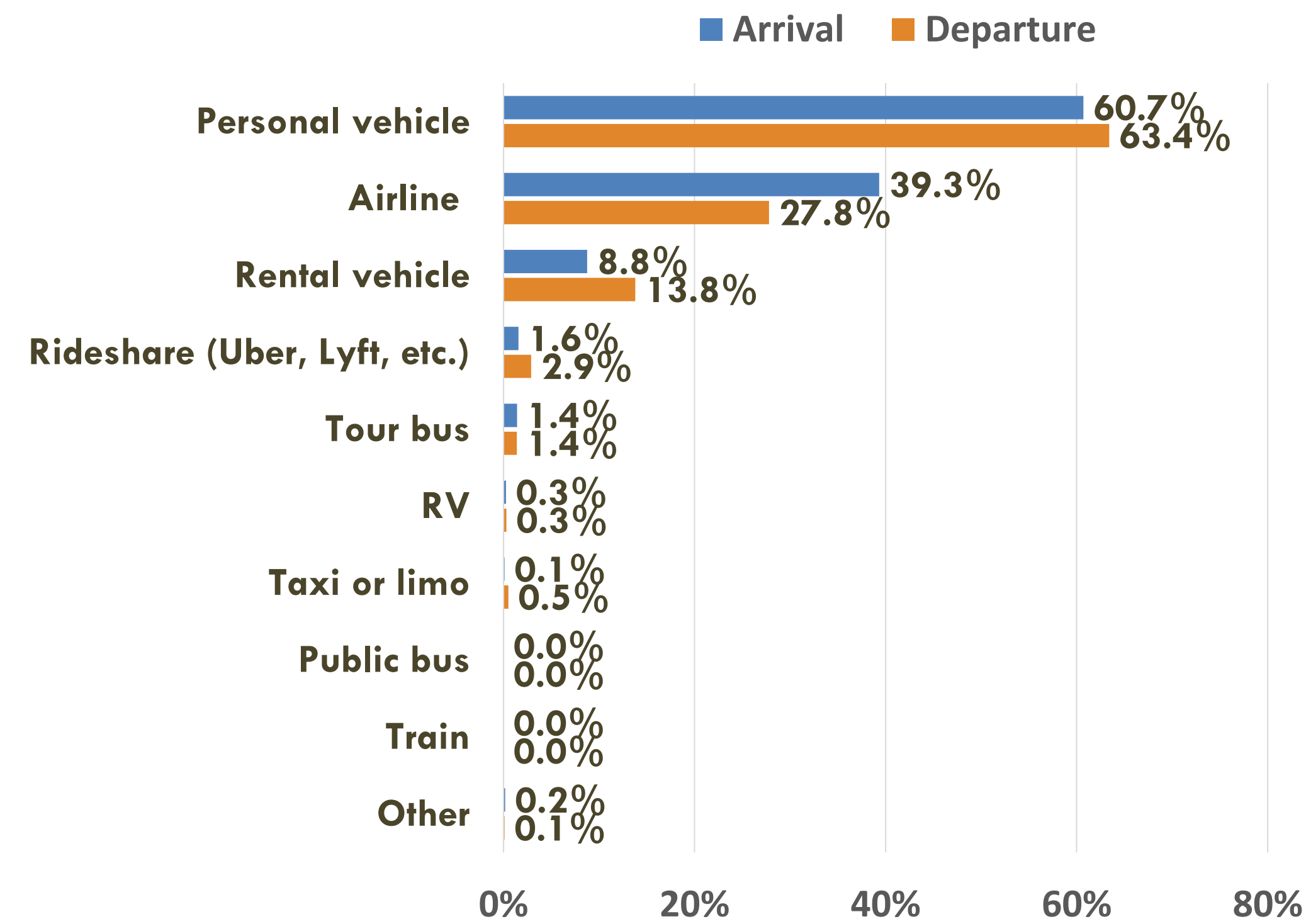
	Hotel	VFR	Day Trip
Vacation	75.5%	45.0%	39.4%
Visit friends or family in the area	3.8%	43.3%	25.5%
Other personal reasons	1.9%	6.6%	17.3%
Weekend getaway	6.3%	5.1%	8.1%
Attend special event	0.8%	0.0%	5.5%
Business	3.7%	0.0%	1.8%
Conference/tradeshows	2.7%	0.0%	1.2%
Wedding	3.8%	0.0%	0.4%
Honeymoon	1.6%	0.0%	0.0%
Attend sports event/tournament	0.0%	0.0%	0.4%
On or pre/post a cruise	0.0%	0.0%	0.4%
Government business/travel	0.0%	0.0%	0.0%
Sample Size:	390	175	255

Question: What is your primary reason for visiting the St. Pete/Clearwater Area? (Select one)
Base: All Respondents. 1,195 responses.

METHOD OF ARRIVAL & DEPARTURE

Preferred methods of arrival in Q2 2022 were personal vehicle (60.7% – slightly down from 63.8% in Q2 2021) and airline (39.3% – slightly up from 35.0% in Q2 2022). Day trippers and VFRs were the likeliest segments to arrive by personal vehicle (75.3% and 57.3%, respectively), and hotel guests the likeliest to arrive by airline (65.4% – an increase from 54.9% in Q2 2021). In general, the methods of departure are the same as the methods of arrival.

Figure 6: Method of Arrival and Departure



Detail by Traveler Segment

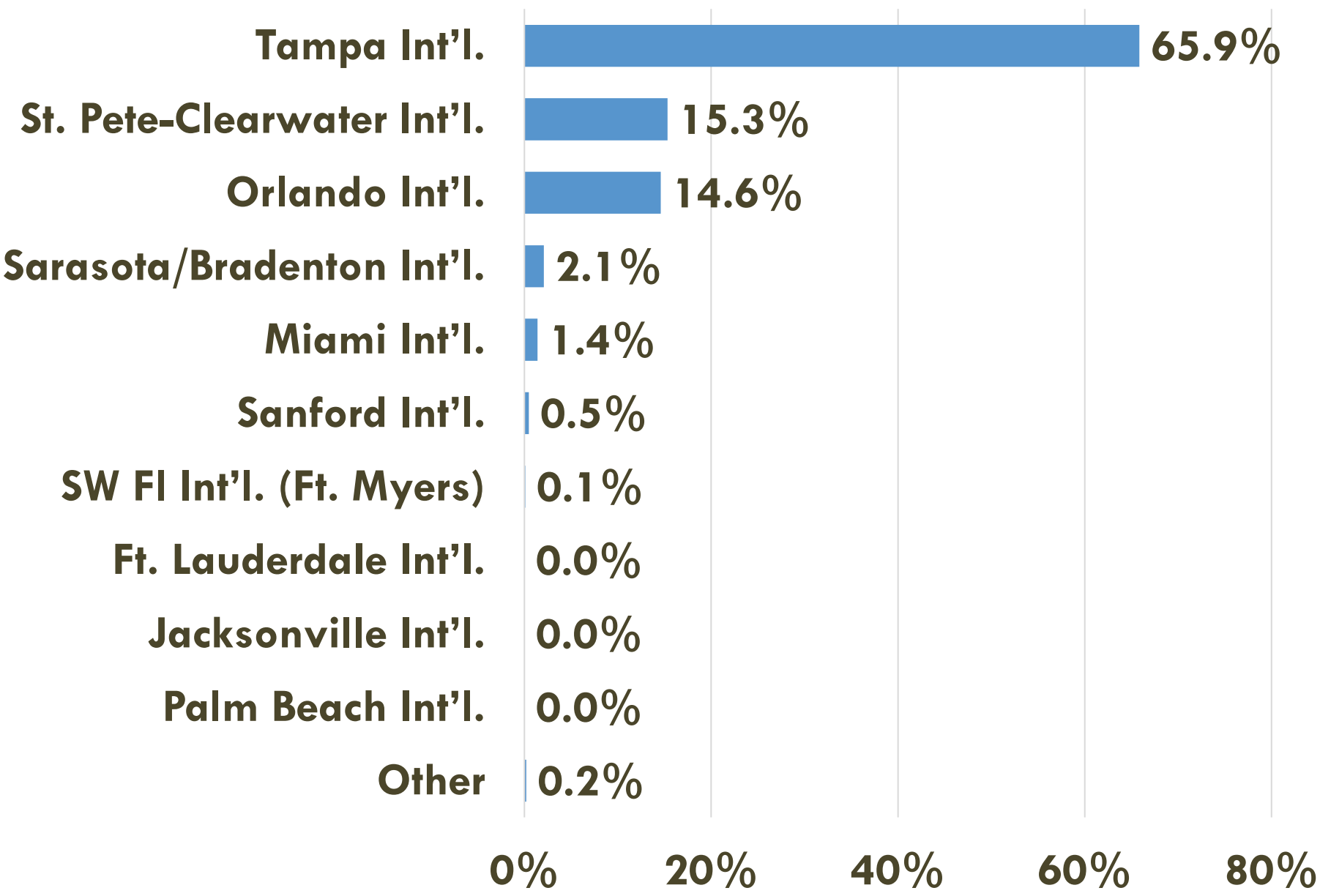
	Hotel		VFR		Day Trip	
	Arrival	Departure	Arrival	Departure	Arrival	Departure
Personal vehicle	33.8%	35.6%	57.3%	70.2%	75.3%	76.9%
Airline	65.4%	50.6%	53.4%	41.7%	23.8%	11.7%
Rental vehicle	10.0%	23.5%	1.1%	5.2%	10.7%	11.6%
Rideshare (Uber, Lyft, etc.)	7.1%	12.8%	0.0%	0.4%	0.4%	0.4%
Tour bus	0.4%	0.4%	0.0%	0.0%	2.3%	0.4%
RV	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Taxi or limo	0.6%	2.5%	0.0%	0.0%	0.0%	0.0%
Public bus	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Train	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	0.0%	0.0%	0.0%	0.7%	0.3%	0.0%
Sample Size:	392		175		286	

Question: How did you arrive in the St. Pete/Clearwater area and how will you leave?
(Select all that apply) Base: All Respondents. 1,228 responses.

ARRIVAL AIRPORT

Air travelers mostly arrived in Pinellas County through Tampa Int'l. (65.9% vs. 63.0% in Q2 2021). 15.3 percent of visitors arriving by airplane flew into St. Pete-Clearwater International (a decrease from 28.8% in Q2 2021), while 14.6 percent of visitors flew into Orlando International (an increase from 6.9% in Q2 2021). Sarasota/Bradenton International was chosen by 2.1 percent of travelers and 1.4 percent flew into Miami International. Nearly equal amounts of hotel guests and VFRs flew into Tampa International (73.5% and 73.8% respectively) and day trip visitors were the most likely segment to fly into Orlando International (28.2%).

Figure 7:Arrival Airport



Question: At which airport did you arrive into the area? (Select one) Base: All Respondents who arrived in the area by airplane. 656 responses.

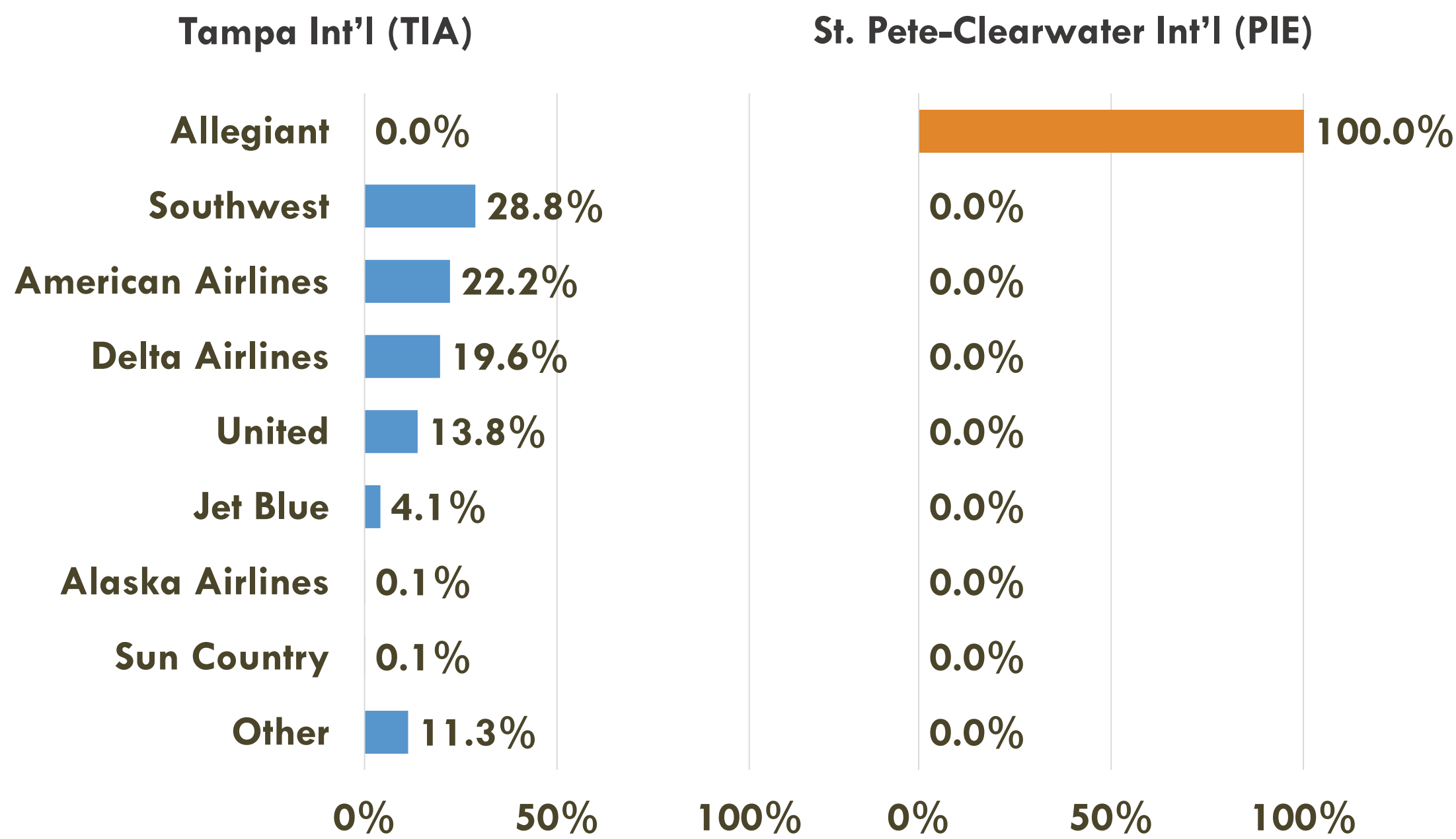
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Tampa Int'l.	73.5%	73.8%	43.3%
St. Pete-Clearwater Int'l	15.6%	18.7%	18.8%
Orlando Int'l.	9.0%	7.5%	28.2%
Sarasota/Bradenton Int'l	0.3%	0.0%	5.5%
Miami Int'l.	0.9%	0.0%	2.8%
Sanford Int'l	0.0%	0.0%	1.4%
SW FI Int'l. (Ft. Myers)	0.3%	0.0%	0.0%
Ft. Lauderdale Int'l.	0.0%	0.0%	0.0%
Jacksonville Int'l.	0.0%	0.0%	0.0%
Palm Beach Int'l.	0.0%	0.0%	0.0%
Other	0.4%	0.0%	0.0%
Sample Size:	259	94	72

ARRIVAL AIRLINE BY AIRPORT

Air travelers who flew into St. Pete-Clearwater International in Q2 2022. arrived via Allegiant Air. Meanwhile, visitors arriving in the destination via Tampa International most commonly flew Southwest Airlines (28.8%), American Airlines (22.2%), Delta Airlines (19.6%) and United Airlines (13.8%). Preferred carrier for hotel guests was Delta Airlines (26.7%), for VFRs it was American Airlines (27.3%) and day trip visitors favored United Airlines to carry them to St. Pete/Clearwater (25.8%)

Figure 8: Arrival Airline Airport



Question: Which airline did you use? (Select one) Base: All Respondents who arrived in the area by airplane at Tampa Int'l or St. Pete-Clearwater Int'l. 586 responses.

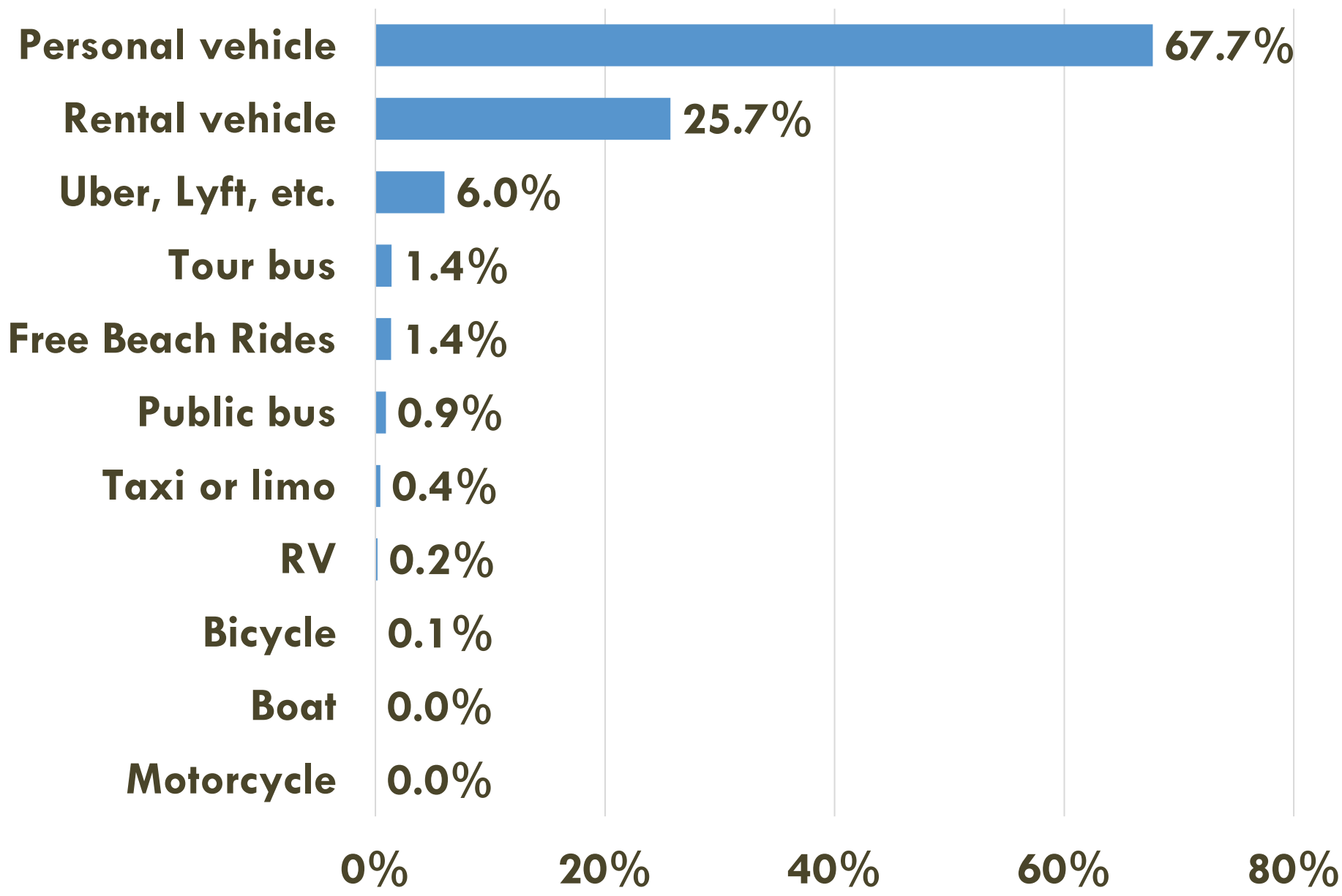
Detail by Traveler Segment

	Hotel		VFR		Day Trip	
	TIA	PIE	TIA	PIE	TIA	PIE
Allegiant	0.0%	100.0%	0.0%	100.0%	0.0%	100.0%
Southwest	24.4%	0.0%	24.9%	0.0%	18.7%	0.0%
American Airlines	21.9%	0.0%	27.3%	0.0%	21.8%	0.0%
Delta Airlines	26.7%	0.0%	16.5%	0.0%	16.7%	0.0%
United	9.7%	0.0%	14.5%	0.0%	25.8%	0.0%
Jet Blue	5.1%	0.0%	2.2%	0.0%	3.1%	0.0%
Alaska Airlines	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Sun Country	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	11.7%	0.0%	14.6%	0.0%	13.7%	0.0%
Sample Size:	234		87		45	

TRANSPORTATION USED IN-MARKET

Amongst all respondents, personal and rental vehicles were the most utilized forms of transportation within the destination in Q2 2022. Overall, 67.7 percent of visitors used their personal vehicle to travel throughout St. Pete/Clearwater (down from 72.5% in Q2 2021) and a quarter (25.7%) drove a rental vehicle (up from 20.4% in Q2 2021). Day trip visitors and VFRs were most likely to use a personal vehicle (81.4% and 80.5%, respectively). Hotel guests were again the likeliest of all segments to take advantage of Free Beach Rides (5.9%).

Figure 9:Transportation Used In-Market



Detail by Traveler Segment

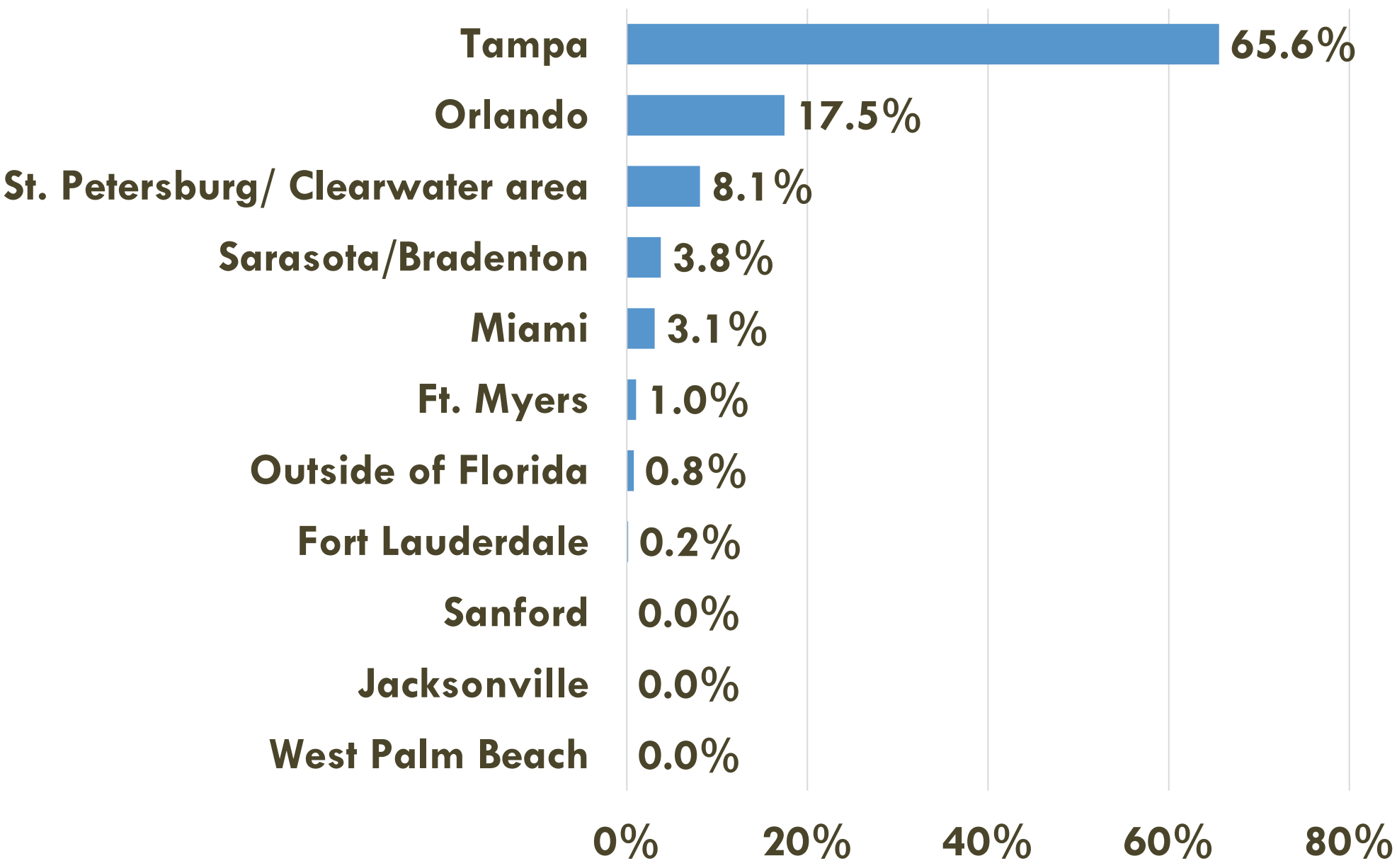
	Hotel	VFR	Day Trip
Personal vehicle	38.3%	80.5%	81.4%
Rental vehicle	37.3%	18.8%	16.3%
Uber, Lyft, etc.	21.1%	6.1%	1.6%
Tour bus	0.4%	0.0%	2.3%
Free Beach Rides	5.9%	0.7%	0.0%
Public bus	3.1%	0.7%	0.3%
Taxi or limo	1.9%	0.0%	0.0%
RV	0.0%	0.0%	0.0%
Bicycle	0.0%	0.7%	0.0%
Boat	0.0%	0.0%	0.0%
Motorcycle	0.0%	0.0%	0.0%
Sample Size:	389	174	286

Question: Which modes of transportation did you, or will you, use while in the St. Pete/Clearwater area? (Select all that apply) Base: All Respondents. 1,224 responses.

RENTAL VEHICLE PICK-UP CITY

Over six-in-ten respondents who used a rental car within Pinellas County, picked up their vehicle in Tampa (65.6% – down from 70.6% in Q2 2021). 17.5 percent of St. Pete/Clearwater visitors rented their vehicle in Orlando (up from 12.0% in Q2 2021) and 8.1 percent rented their vehicle in St. Pete/Clearwater (down from 13.3% in Q2 2021). Additionally, 3.8 percent of visitors picked up their rental car in Sarasota/Bradenton (up from 1.3% in Q2 2021) and 3.1 percent in Miami (up from 1.2%). Hotel guests had a slightly higher propensity to rent a vehicle in Pinellas County than other segments (11.1% vs. 9.2 for VFRs and 7.5% for day trippers).

Figure 10: Rental Vehicle Pick-Up City



Detail by Traveler Segment

	Hotel	VFR	Day Trip
Tampa	69.1%	84.3%	42.4%
Orlando	16.0%	6.5%	30.1%
St. Petersburg/ Clearwater area	11.1%	9.2%	7.5%
Sarasota/Bradenton	0.0%	0.0%	10.0%
Miami	2.1%	0.0%	6.2%
Ft. Myers	1.1%	0.0%	1.9%
Outside of Florida	0.0%	0.0%	1.8%
Fort Lauderdale	0.6%	0.0%	0.0%
Sanford	0.0%	0.0%	0.0%
Jacksonville	0.0%	0.0%	0.0%
West Palm Beach	0.0%	0.0%	0.0%
Sample Size:	149	33	50

Question: In which city did you rent your rental vehicle? (Select one)
Base: Respondents who arrived in the area by rental car. 436 responses.

TRAVEL PARTY SIZE

In Q2 2022, average travel groups to the area were comprised of 2.7 people (vs. 2.6 in Q1 2021), including 0.9 adult males, 1.4 adult females and 0.4 children aged 17 years or younger. 21.6 percent of visitors had children in their group (vs. 20.8% in Q2 2021). Day trippers and hotel guests were the likeliest to be travelling with children (20.4% and 18.3%, respectively). Interestingly, 14.8 percent of VFRs traveled with children. In comparison, 23.7 percent of VFRs had children in their party in Q2 2021.

Figure 11: Travel Party Size

	Mean
Male adults (18 yrs. +)	0.9
Female adults (18 yrs. +)	1.4
Male children (0 to 17 yrs.)	0.2
Female children (0 to 17 yrs.)	0.2
Average Travel Party Size	2.7
Percent with children in party	21.6%
Sample Size:	1,228

Detail by Traveler Segment

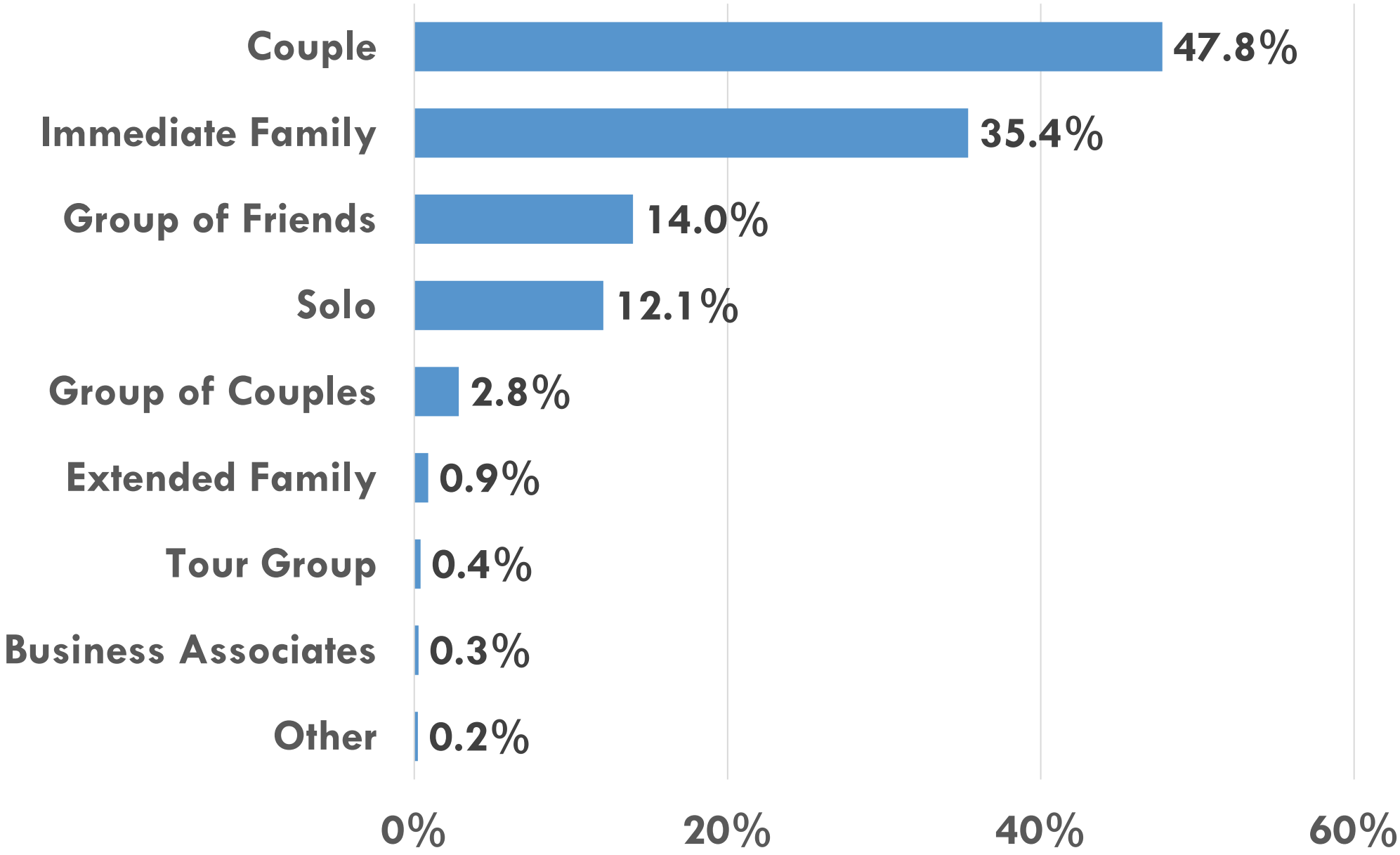
	Hotel	VFR	Day Trip
Male adults (18 yrs. +)	1.0	0.8	0.9
Female adults (18 yrs. +)	1.3	1.2	1.4
Male children (0 to 17 yrs.)	0.2	0.1	0.2
Female children (0 to 17 yrs.)	0.2	0.2	0.2
Average Travel Party Size	2.6	2.3	2.7
Percent with Children in Party	18.3%	14.8%	20.4%
Sample Size:	392	175	286

Question: How many people of each type are in your immediate travel party, including yourself?
Base: All Respondents. 1,228 responses.

TRAVEL PARTY COMPOSITION

Nearly half of St. Pete/Clearwater visitors travelled to the area as a couple (47.8%). 35.4 percent of respondents traveled with immediate family, 14.0 percent said they were travelling with a group of friends and 12.1 percent traveled solo. Hotel guests were again the segment most likely to travel as a couple (58.7%) and VFRs continue to be the segment likeliest to travel alone to visit friends or family (24.1%).

Figure 12: Travel Party Composition



Detail by Traveler Segment

	Hotel	VFR	Day Trip
Couple	58.7%	49.9%	38.9%
Immediate Family	30.7%	36.6%	34.1%
Group of Friends	10.9%	3.7%	18.1%
Solo	5.8%	24.1%	14.8%
Group of Couples	3.7%	0.9%	2.9%
Extended Family	0.0%	0.0%	1.3%
Tour Group	0.4%	0.0%	0.6%
Business Associates	1.5%	0.0%	0.0%
Other	0.0%	0.7%	0.3%
Sample Size:	391	175	286

Question: Which best describes your travel group on this trip? Are you...? (Select all that apply)
Base: All Respondents. 1,227 responses.

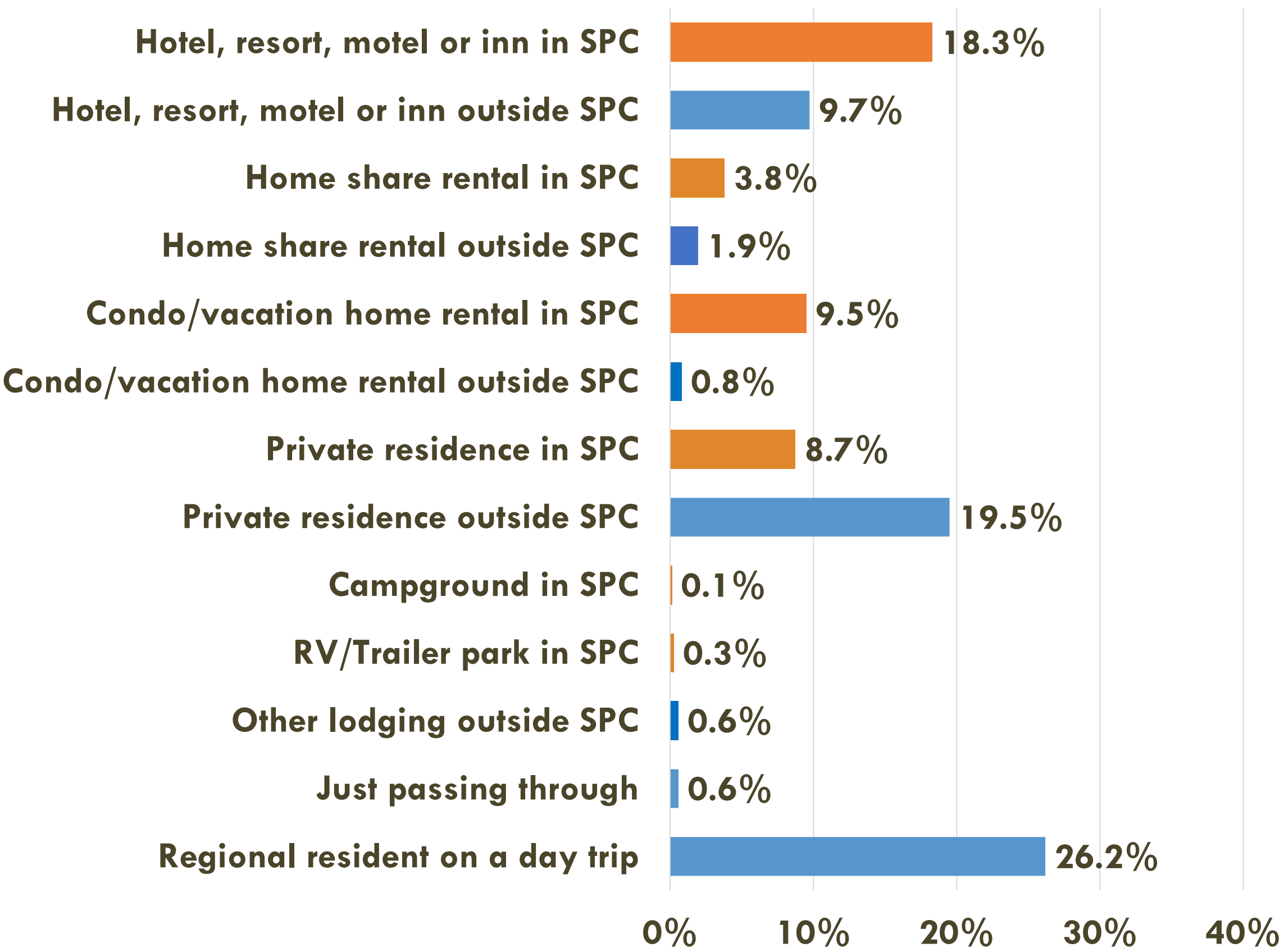
LODGING TYPE

Four-in-ten visitors surveyed in Q2 2022 stayed overnight in St. Pete/Clearwater (40.7% – up from 36.4% in Q2 2021). A significant proportion of overnight visitors (31.9%), stayed in paid Pinellas County accommodations, such as a hotel, resort, motel or inn (18.3%), condo/vacation home rental (9.5%) or a home share rental (3.8%). In addition, 8.7% percent stayed in a private residence of a family or friend – up from 2.0 percent in Q2 2021.

Day-trippers—including those staying in paid or private accommodations outside the St. Pete/Clearwater area and regional residents on leisure day trips—represented 58.7 percent of visitors surveyed (down from 62.2% in Q2 2021).

Question: Where are you staying overnight on this trip to the St. Pete/Clearwater area? (Select one) Base: All Respondents. 1,228 responses.

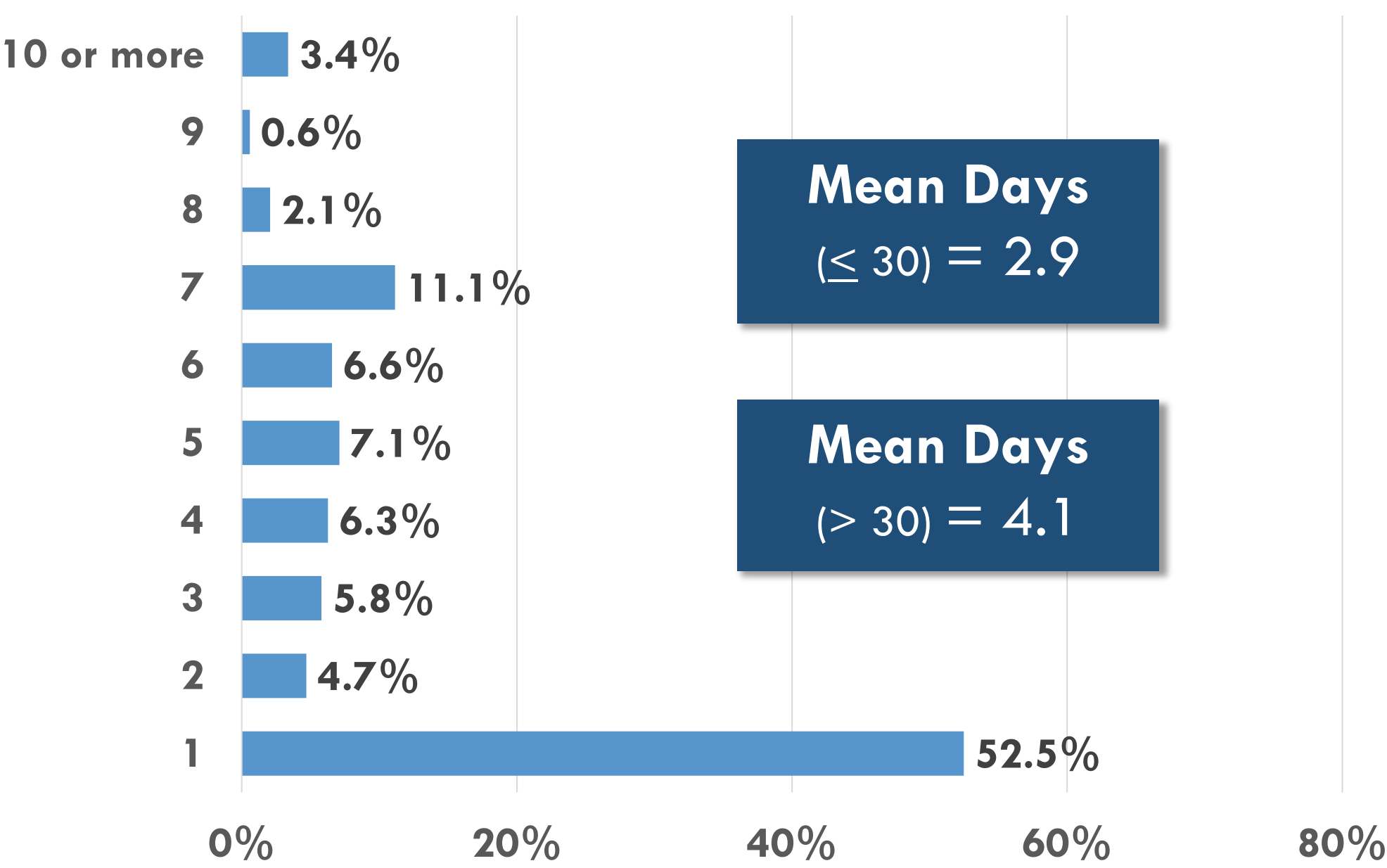
Figure 13: Type of Lodging



DAYS IN ST. PETE/CLEARWATER

The typical visitor surveyed, who spent less than 30 days in the destination, stayed in the area for 2.9 days. VFRs reported the longest length of stay averaging 5.7 days (down from 6.4 days in Q2 2021), followed by hotel guests who reported an average of 5.1 days (down from 5.3 days in Q2 2021). Looking specifically at visitors who had extended stays of more than 30 days, their average length of stay was 4.1 days in the destination (up from 3.4 in Q2 2021), with VFRs averaging the longest stay (13.3 days – up from 9.7 in Q2 2021).

Figure 14: Days in Market



Detail by Traveler Segment

	Hotel	VFR	Day Trip
10 or more	1.5%	17.0%	0.0%
9	1.1%	0.4%	0.0%
8	2.1%	3.6%	0.0%
7	19.5%	22.4%	0.6%
6	15.7%	10.3%	0.0%
5	21.8%	19.7%	0.4%
4	18.1%	15.5%	1.7%
3	14.4%	5.6%	3.9%
2	4.8%	4.8%	5.6%
1	0.8%	0.7%	87.8%
Mean Days (<30)	5.1	5.7	1.1
Mean Days (>30)	5.1	13.3	1.1
Sample Size:	392	175	286

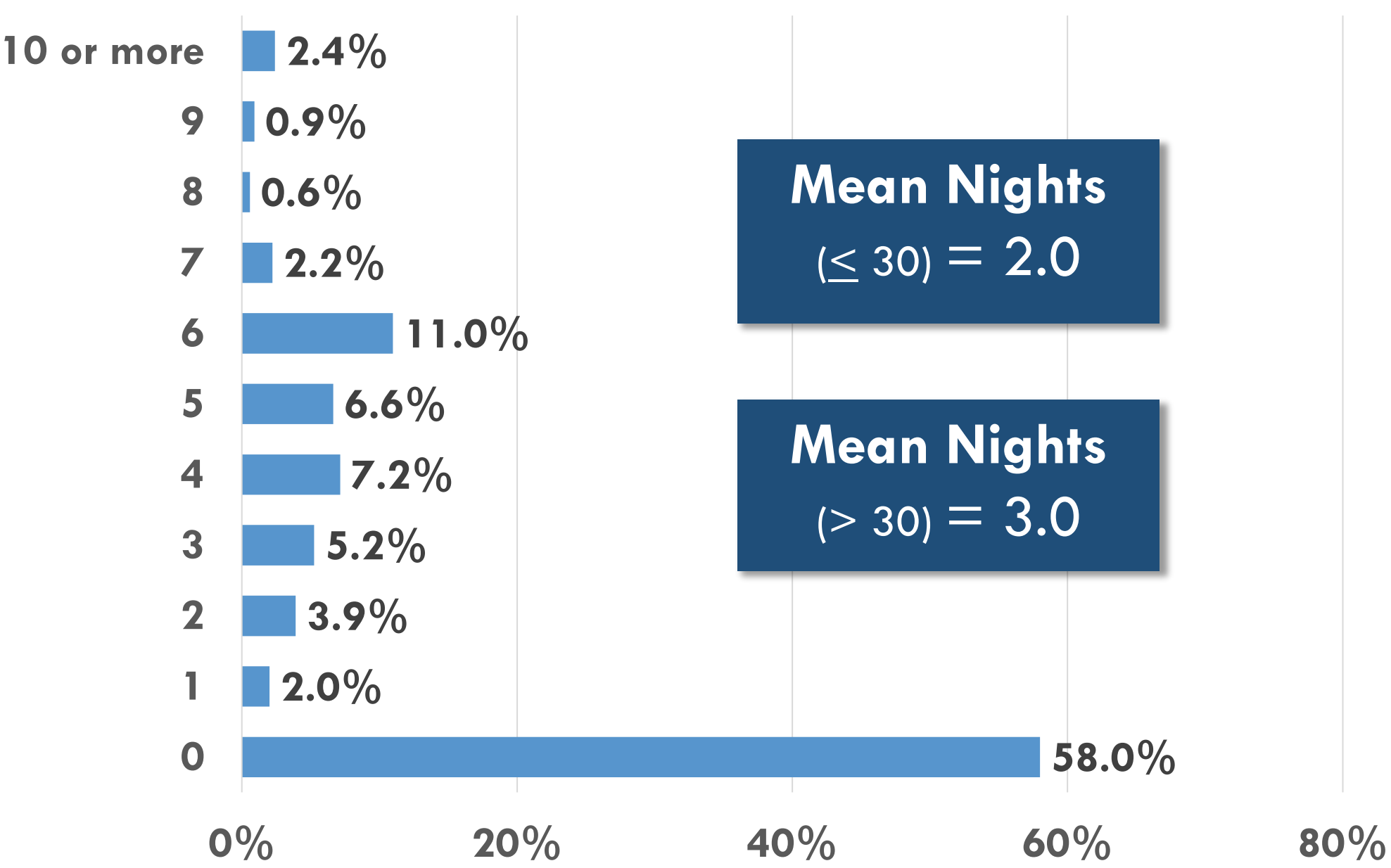
Question: How many total days and nights did you, or will you, stay in the St. Pete/Clearwater area on this trip? Base: All Respondents. 1,228 responses.

NIGHTS IN ST. PETE/CLEARWATER

On average, visitors spent 2.0 nights in St. Pete/Clearwater in Q2 2022. 6.1 percent of visitors surveyed spent a week or more in the destination, down from 9.0 percent in Q2 2021.

VFRs averaged the longest stays, with 20.3 percent staying 7 or more nights in the area, down from 29.3 percent in Q2 2021.

Figure 15: Nights in Market



Detail by Traveler Segment

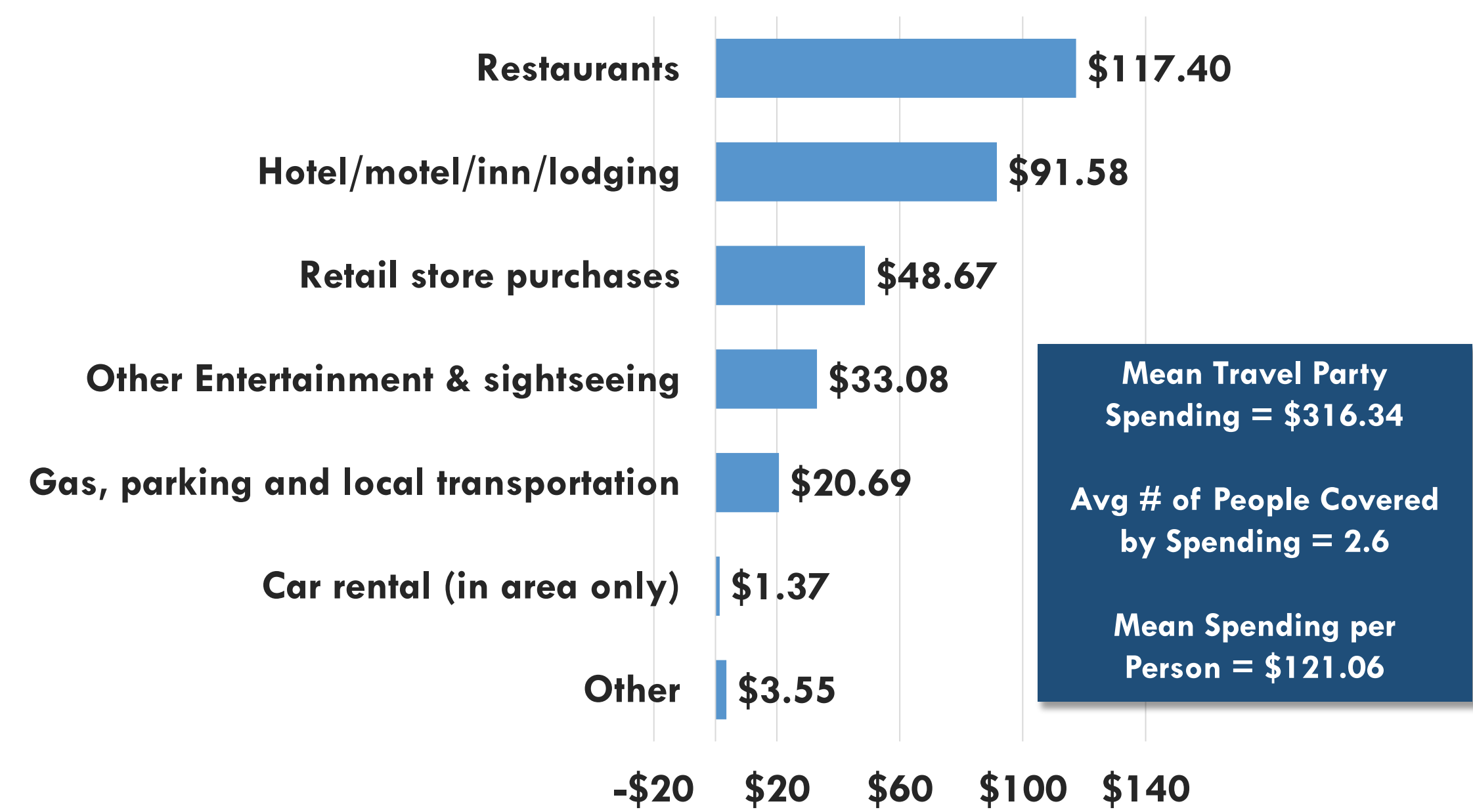
	Hotel	VFR	Day Trip
10 or more	0.7%	13.2%	--
9	0.9%	3.1%	--
8	1.1%	0.4%	--
7	2.4%	3.6%	--
6	18.9%	22.4%	--
5	16.2%	10.7%	--
4	21.8%	20.4%	--
3	18.5%	14.4%	--
2	14.7%	5.6%	--
1	4.8%	4.8%	--
0	0.0%	1.4%	100%
Mean Nights (<30)	4.1	4.9	--
Mean Nights (>30)	4.1	11.7	--
Sample Size:	392	175	286

Question: How many total days and nights did you, or will you, stay in the St. Pete/Clearwater area on this trip? Base: All Respondents. 1,228 responses.

DAILY SPENDING IN-MARKET

St. Pete/Clearwater visitors spent \$316.34 per travel party in Pinellas County, an increase from \$274.16 in Q2 2021. It is estimated that the average visitor represented \$121.06 per person in daily spending, covering an average of 2.6 travelers. Hotel guests reported the highest spending, averaging \$574.27 per travel party and \$232.73 per person, covering an average of 2.5 travelers. Approximately \$309.10 was spent on St. Pete/Clearwater area lodging accommodations, up from \$256.58 in Q2 2021.

Figure 16: Per Day Travel Party Spending



Detail by Traveler Segment

	Hotel	VFR	Day Trip
Restaurants	\$165.62	\$96.52	\$92.01
Hotel/motel/inn/lodging	\$309.10	\$15.52	\$3.29
Retail store purchases	\$42.76	\$32.64	\$55.52
Other Entertainment & sightseeing	\$27.02	\$17.24	\$36.32
Gas, parking and local transportation	\$22.93	\$8.34	\$22.06
Car rental (in area only)	\$2.34	\$1.14	\$1.03
Other	\$4.49	\$3.62	\$1.41
Mean Spending per Travel Party	\$574.27	\$175.02	\$211.64
# of People Covered by Spending	2.5	2.2	2.6
Mean Spending per Person	\$232.73	\$79.52	\$81.63
Sample Size:	382	168	275

Question: PER DAY, approximately how much will you spend on each of the following while in the St. Pete/Clearwater area? Base: All Respondents. 1,189 responses.

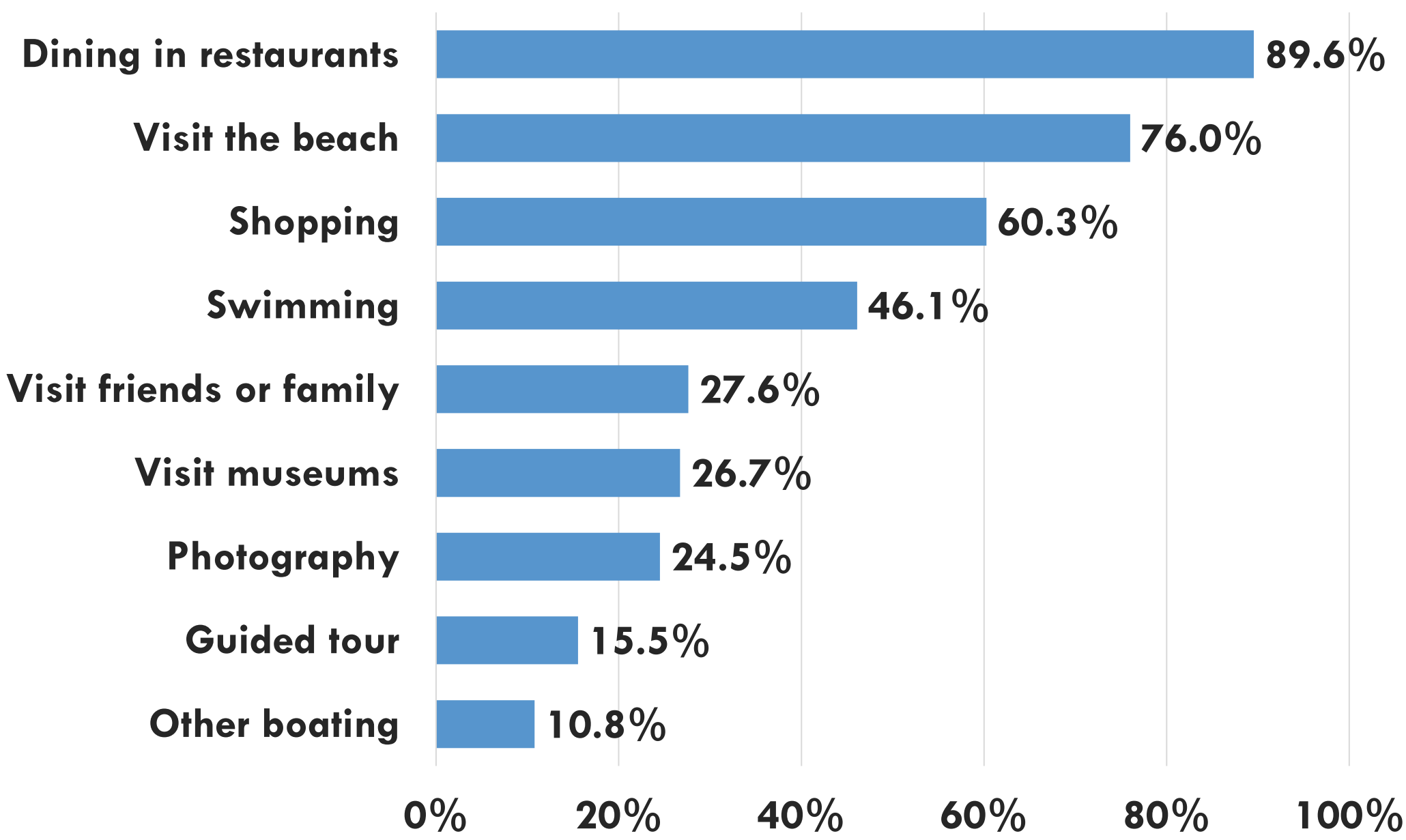
TRIP ACTIVITIES

Visitors engaged in a variety of activities while in Pinellas County, with dining in restaurants (89.6%), visiting the beach (76.0%) and shopping (60.3%) being the most common.

Presented with a list of 25 activities, visitors selected all the activities they participated in. The chart and table below list the top 9 activities selected.

Full detail on all factors tested is presented on the next page.

Figure 17: Trip Activities



Question: Which of these activities did you, or will you, participate in while in the St. Pete/Clearwater area? (Select all that apply) Base: All Respondents. 1,228 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Dining in restaurants	96.3%	96.2%	84.7%
Visit the beach	94.5%	87.2%	64.0%
Shopping	71.5%	68.2%	50.2%
Swimming	75.7%	59.6%	27.1%
Visit friends or family	18.2%	67.3%	26.6%
Visit museums	20.2%	26.5%	28.8%
Photography	31.4%	35.5%	23.9%
Guided tour	24.6%	14.5%	8.3%
Other boating	21.5%	14.5%	5.2%
Sample Size:	392	175	286

TRIP ACTIVITIES – FULL DETAIL

	Total	Hotel	VFR	Day Trip
Dining in restaurants	89.6%	96.3%	96.2%	84.7%
Visit the beach	76.0%	94.5%	87.2%	64.0%
Shopping	60.3%	71.5%	68.2%	50.2%
Swimming	46.1%	75.7%	59.6%	27.1%
Visit friends or family	27.6%	18.2%	67.3%	26.6%
Visit museums	26.7%	20.2%	26.5%	28.8%
Photography	24.5%	31.4%	35.5%	23.9%
Guided tour	15.5%	24.6%	14.5%	8.3%
Other boating	10.8%	21.5%	14.5%	5.2%
Attend a festival or special event	7.4%	8.9%	9.3%	7.2%
Bars/Nightlife	7.2%	17.3%	15.5%	2.4%
Shelling	6.2%	12.8%	7.9%	2.9%
Jet skiing	4.7%	11.0%	3.9%	1.4%
Fishing	4.5%	3.7%	7.0%	2.9%
Take a dining cruise	3.3%	9.2%	1.4%	1.2%
Bird watching	2.6%	3.4%	1.6%	1.7%
Visit breweries and/or distilleries	2.0%	1.0%	7.9%	1.3%
Parasailing	1.6%	3.3%	0.0%	0.4%
Biking	1.6%	0.9%	3.8%	0.9%
Kayaking/Canoeing	1.4%	2.8%	3.1%	0.0%
Golf	1.1%	1.2%	2.3%	0.7%
Attend or participate in a sporting event	0.8%	1.0%	1.6%	0.6%
Baseball Spring Training	0.5%	0.0%	1.4%	0.4%
Paddle boarding	0.5%	0.6%	3.8%	0.0%
Sailing	0.2%	0.4%	1.2%	0.0%
Sample Size:	1,228	392	175	286

Differences seen amongst visitor types:

- All segments participated in a variety of activities, however, hotel guests and VFRs were more likely than day trippers to have dined in restaurants, visited a beach, went shopping, swimming or to enjoy bars & nightlife than day trippers while in the destination.
- Hotel guests were most likely to take a guided tour (17.2%)
- VFRs were the likeliest segment to have visited one of the Pinellas County breweries (7.9%).
- Day trippers were slightly more inclined to visit a museum than hotel guests or VFRs (28.8%)

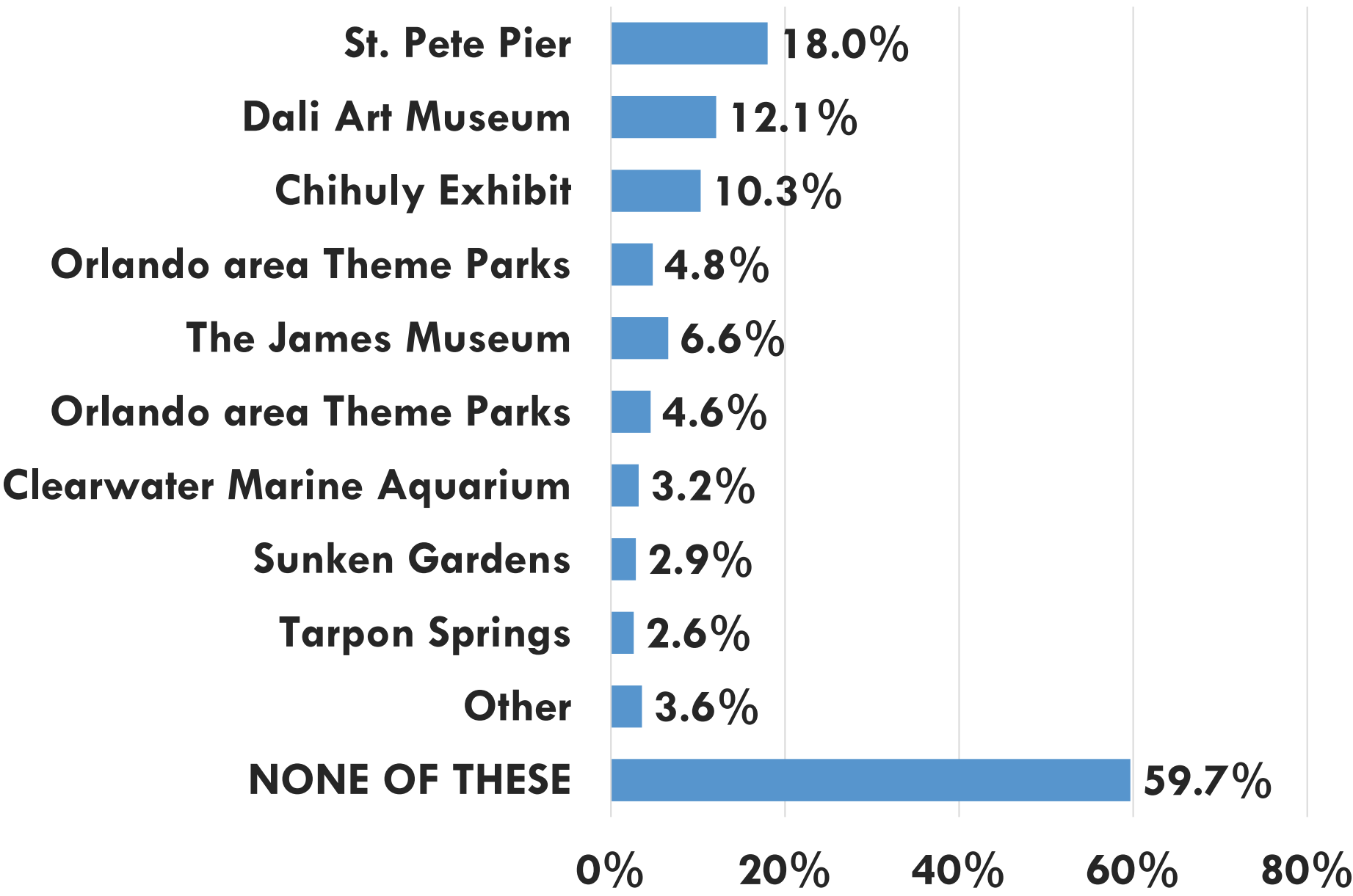
Question: Which of these activities did you, or will you, participate in while in the St. Pete/Clearwater area?
(Select all that apply)

Base: All Respondents. 1,228 responses.

ATTRACTIONS VISITED

In line with Q2 2021, the top three St. Pete/Clearwater attractions visitors frequented were the St. Pete Pier (18.0%), the Dali Art Museum (12.1%) and the Chihuly Exhibit (10.3%). VFRs were the likeliest of all segments to have visited the St. Pete Pier (26.4%), the Dali Museum (15.8%), Sunken Gardens (6.3%) and Tarpon Springs (7.5%),.

Figure 18:Attractions Visited



Detail by Traveler Segment

	Hotel	VFR	Day Trip
St. Pete Pier	15.0%	26.4%	17.3%
Dali Art Museum	11.4%	15.8%	11.8%
Chihuly Exhibit	7.2%	10.1%	12.0%
Orlando area Theme Parks	6.0%	2.0%	5.4%
Clearwater Marine Aquarium	6.5%	3.9%	1.4%
Sunken Gardens	2.9%	6.3%	1.5%
Tarpon Springs	2.5%	7.5%	1.6%
Other	1.7%	3.3%	4.7%
NONE OF THESE	65.0%	48.4%	59.5%
Sample Size:	390	172	285

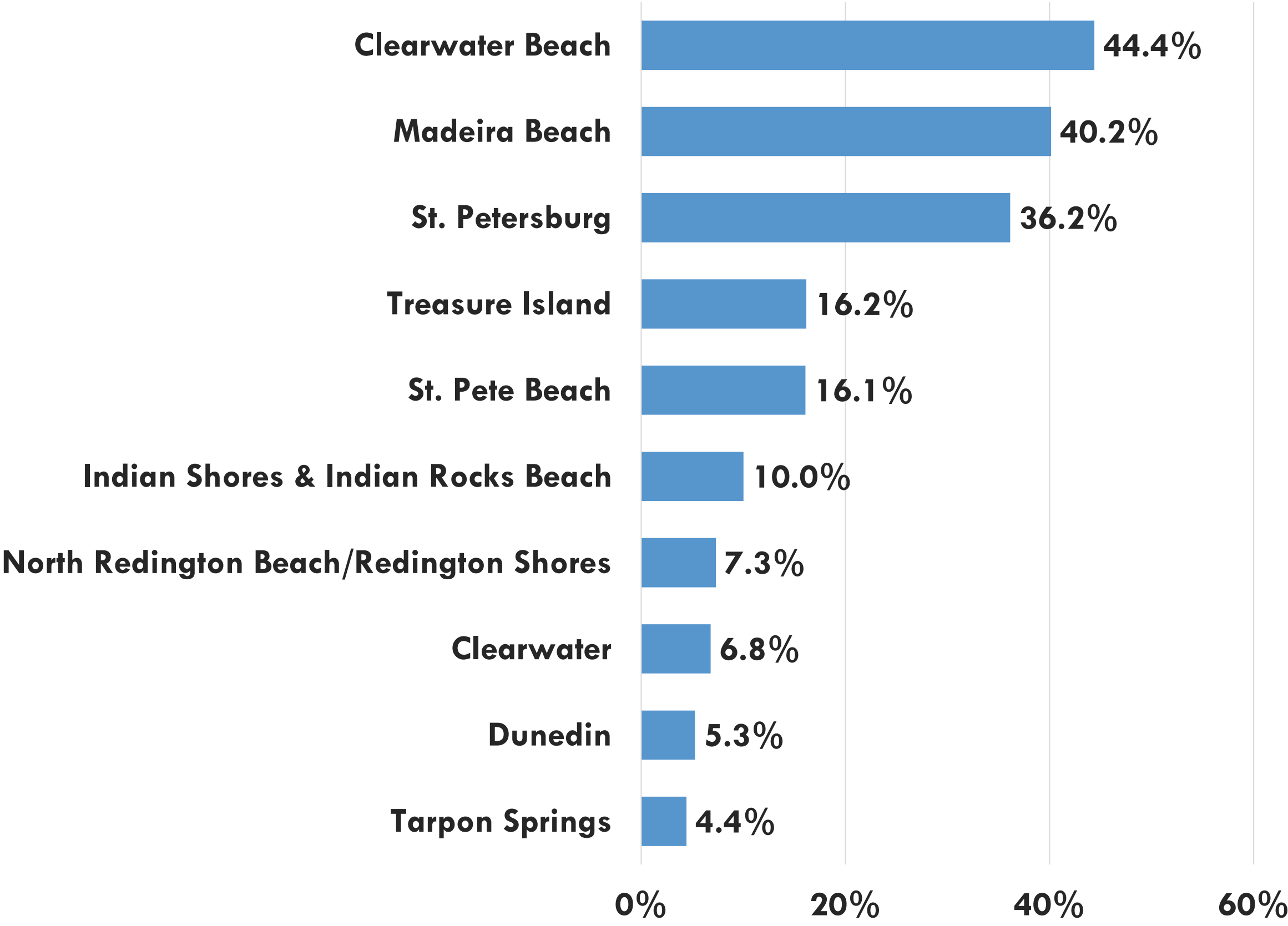
Question: Which of these attractions did you (or will you) visit while on this trip? (Select all that apply) Base: All Respondents. 1,220 responses.

TOP COMMUNITIES VISITED

St. Pete/Clearwater area visitors most commonly frequented Clearwater Beach (44.4% – up from 36.9% in Q2 2021), Madeira Beach (40.2% – up from 27.0% in Q2 2021) and St. Petersburg (36.2% – down from 46.8% in Q2 2021). Other popular communities visited included Treasure Island, St. Pete Beach, Indian Shores & Indian Rocks Beach.

Detail by type of visitor is presented on the following page.

Figure 19: Top Communities Visited



Question: Which of the following communities in the St. Pete/Clearwater area did you visit?
(Show list. Select all that apply) Base: All Respondents. 1,225 responses.

COMMUNITIES VISITED – FULL DETAIL

	Total	Hotel	VFR	Day Trip
Clearwater Beach	44.4%	61.4%	47.5%	37.4%
Madeira Beach	40.2%	30.3%	52.4%	32.2%
St. Petersburg	36.2%	27.8%	49.4%	34.2%
Treasure Island	16.2%	18.8%	26.3%	4.5%
St. Pete Beach	16.1%	24.4%	23.5%	5.3%
Indian Shores & Indian Rocks Beach	10.0%	6.6%	25.7%	1.3%
North Redington Beach/Redington Shores	7.3%	6.2%	13.1%	1.3%
Clearwater	6.8%	6.9%	24.0%	3.9%
Dunedin	5.3%	3.0%	20.4%	3.0%
Tarpon Springs	4.4%	3.7%	12.4%	1.6%
Largo	3.7%	2.5%	21.3%	0.0%
Pass-A-Grille Beach	3.4%	4.6%	9.3%	1.0%
Seminole	3.3%	1.8%	7.7%	0.7%
Pinellas Park	1.8%	0.4%	4.7%	1.0%
Palm Harbor	1.5%	1.4%	5.8%	0.9%
Tierra Verde	1.4%	2.0%	2.3%	0.3%
Gulfport	1.4%	0.6%	8.7%	0.0%
Safety Harbor	1.0%	0.8%	3.8%	0.0%
Oldsmar	0.6%	0.8%	3.5%	0.0%
Sample Size:	1,225	390	174	286

Interesting differences seen amongst visitor types:

- Hotel guests were the most likely segment to have visited Clearwater Beach during their trip to the St. Pete/Clearwater area.
- VFRs continued to be the likeliest segment to have visited most of the Pinellas County communities.
- In Q2 2022, Clearwater Beach was the community day trippers mostly visited besides Madeira Beach and downtown St. Petersburg.

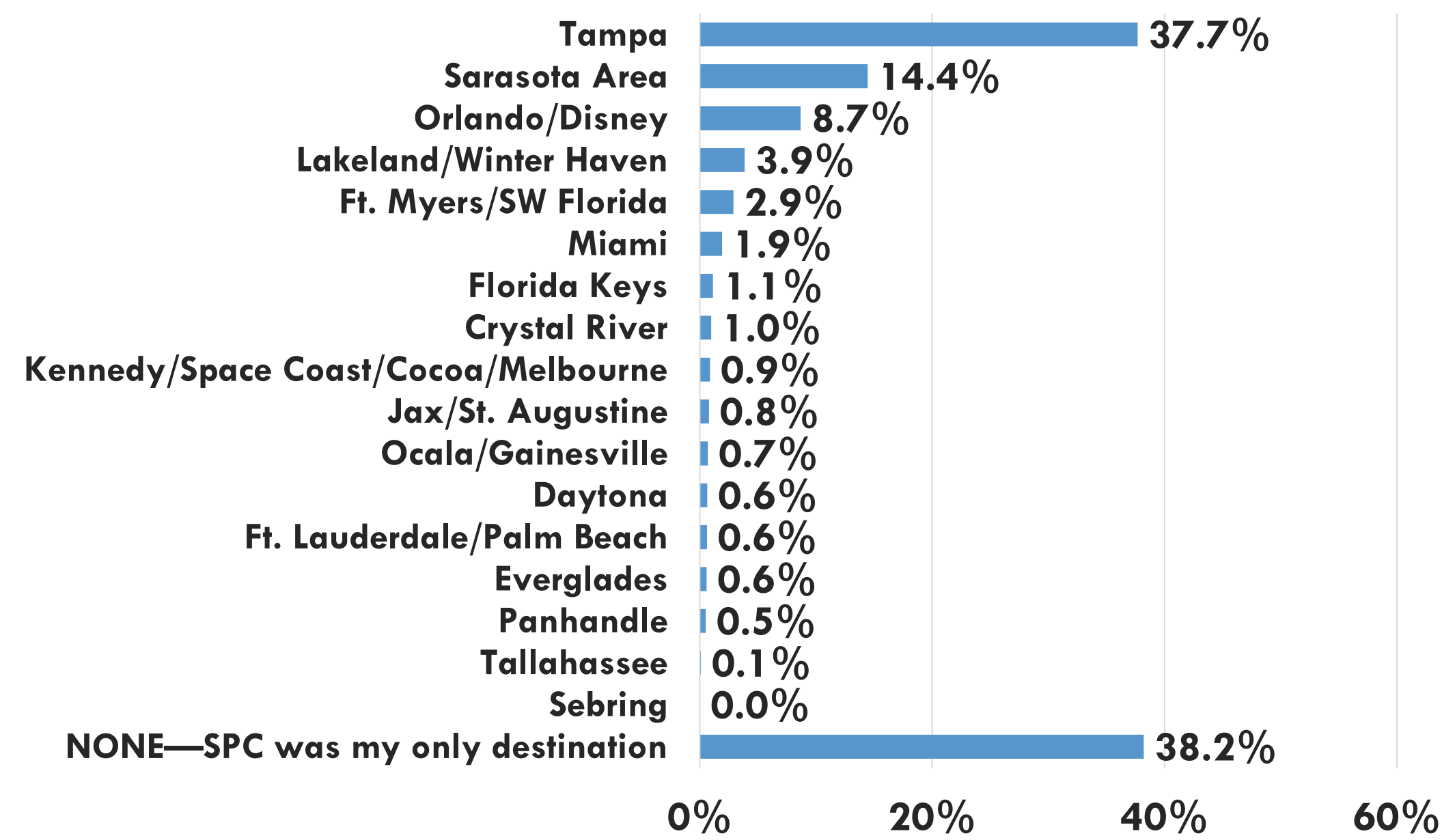
Question: Which of the following communities in the St. Pete/Clearwater area did you visit? (Show list. Select all that apply)

Base: All Respondents. 1, 225 responses.

OTHER DESTINATIONS VISITED

For nearly four-in-ten visitors, St. Pete/Clearwater was the only destination during their trip to the area in Q2 2022 (38.2% -- down from 46.8% in Q2 2021). Respondents were likeliest to have visited Tampa (37.7%), the Sarasota area (14.4%) and Orlando/Disney (8.7%). Other destinations included Lakeland/Winter Haven (3.9%), Ft. Myers/SW Florida (2.9%), Miami (1.9%), the Florida Keys (1.1%) and Crystal River (1.0%).

Figure 20: Other Destinations Visited on St. Pete/Clearwater Trip



Question: Which of these other destinations did you visit while on this trip? (Select all that apply) Base: All Respondents. 1,222 responses.

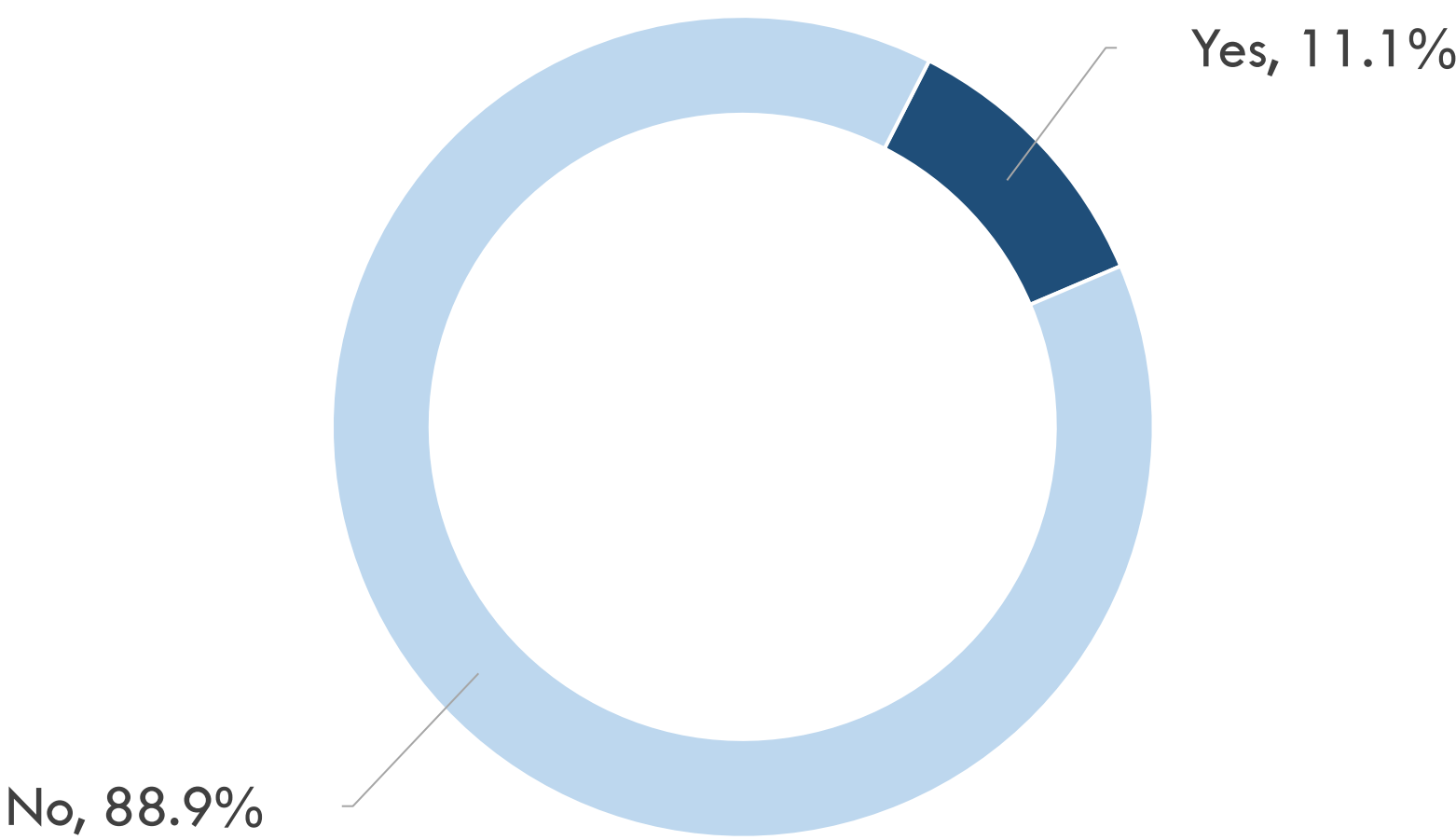
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Tampa	27.3%	28.9%	39.8%
Sarasota Area	4.0%	10.1%	19.3%
Orlando/Disney	10.0%	4.8%	9.6%
Lakeland/Winter Haven	1.2%	2.9%	5.4%
Ft. Myers/SW Florida	3.7%	4.5%	2.3%
Miami	3.2%	1.2%	2.0%
Florida Keys	0.6%	2.3%	0.7%
Crystal River	1.0%	2.2%	0.9%
Kennedy/Space Coast/Cocoa/Melbourne	1.4%	0.0%	0.7%
Jax/St. Augustine	1.2%	3.3%	0.4%
Ocala/Gainesville	0.8%	0.7%	0.7%
Daytona	0.6%	0.7%	0.7%
Ft. Lauderdale/Palm Beach	1.1%	2.2%	0.3%
Everglades	0.0%	0.0%	1.0%
Panhandle	1.2%	1.7%	0.0%
Tallahassee	0.0%	0.0%	0.0%
Sebring	0.0%	0.0%	0.0%
NONE—SPC was my only destination	54.4%	55.1%	30.9%
Sample Size:	389	173	285

FIRST-TIME VISIT TO FLORIDA

In Q2 2022, 11.1 percent of visitors surveyed were in the State of Florida for the very first time, twice as many as in Q2 2021 (5.4%). The majority of visitors had been in Florida on a previous trip (88.9%). Across all segments, we saw an increased number of first-time visitors to Florida: hotel guests (19.7% -- up from 5.5 in Q2 2021), VFRs. (8.9% -- up from 5.4% in Q2 2021) and day trip visitors (9.2% -- up from 5.3%)

Figure 21: First-Time Visitors to Florida



Detail by Traveler Segment

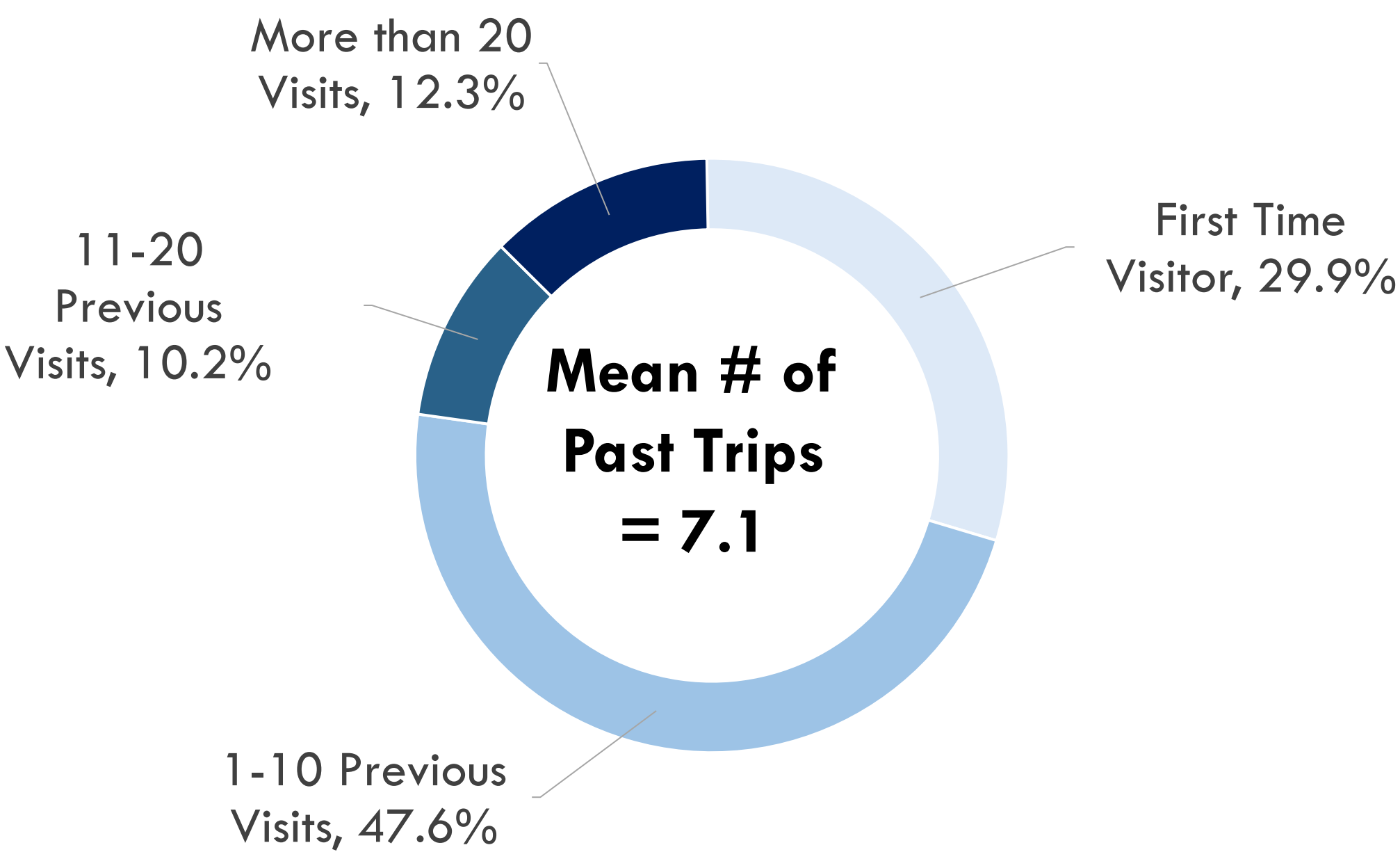
	Hotel	VFR	Day Trip
Yes	19.7%	8.9%	9.2%
No	80.3%	91.1%	90.8%
Sample Size:	389	173	279

Question: Is this your first visit to Florida? Base: All Respondents 1,215 responses.

PREVIOUS VISITATION TO ST. PETE/CLEARWATER

As in Q2 2021, nearly the same proportions of visitors were in the St. Pete/Clearwater area for the first time (29.9% vs. 29.6% in Q2 2021). The average Q2 2022 St. Pete/Clearwater visitor surveyed had taken 7.1 previous trips to the destination – down from 8.6 trips in Q2 2021. 12.3 percent reported to have visited Pinellas County more than 20 times, 10.0 percent of respondents said they had 11-20 previous visits, and 47.6 percent claimed they visited the destination between 1-10 times in the past.

Figure 22: Previous Visitation to the St. Pete/Clearwater Area



Detail by Traveler Segment

	Hotel	VFR	Day Trip
First-time Visitors	42.2%	17.8%	30.3%
1-10 Previous Visits	48.1%	60.1%	40.6%
11-20 Previous Visits	4.3%	11.4%	12.7%
More than 20 Previous Visits	5.3%	10.7%	16.4%
Mean	3.8	7.0	8.6
Sample Size:	389	174	280

Question: Prior to this visit, how many times have you been to the St. Pete/Clearwater area?
Base: All Respondents. 1,216 responses.

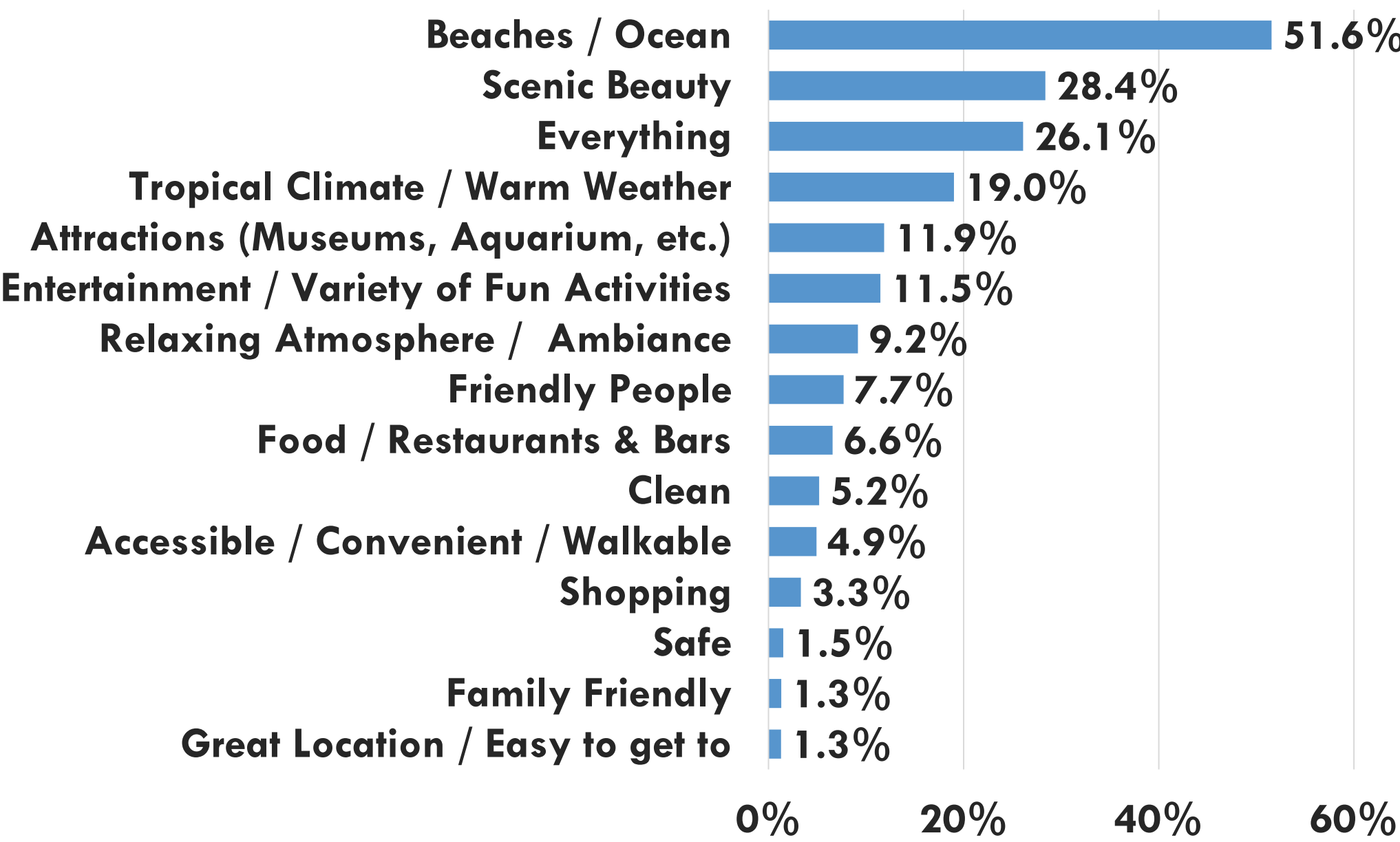
A photograph of three dogs sitting at a wooden table. On the left is a bulldog with its tongue out, wearing a purple collar. In the middle is a bulldog with its tongue out, wearing a patterned bandana. On the right is a beagle with its mouth open, wearing a blue harness. There are three yellow beer cups on the table, one in front of each dog. The background features a large red heart and a white cloud graphic. A teal vertical line is on the left side of the text.

Visitor Satisfaction

MOST LIKED ASPECTS OF ST. PETE/CLEARWATER

St. Petersburg/Clearwater beaches continued to be the most liked aspect (51.6%), followed by scenic beauty (28.4%), and “everything” (26.1%). Hotel guests were the likeliest segment to like the beaches (60.7%), while VFRs were the likeliest to say “everything” (30.3%) and day trip visitors said their best liked aspect were area attractions (16.0%).

Figure 23: Most Liked Aspects of St. Pete/Clearwater (Unaided)



Question: What do you like most about the St. Pete/Clearwater area?
Base: All Respondents. 1,225 responses.

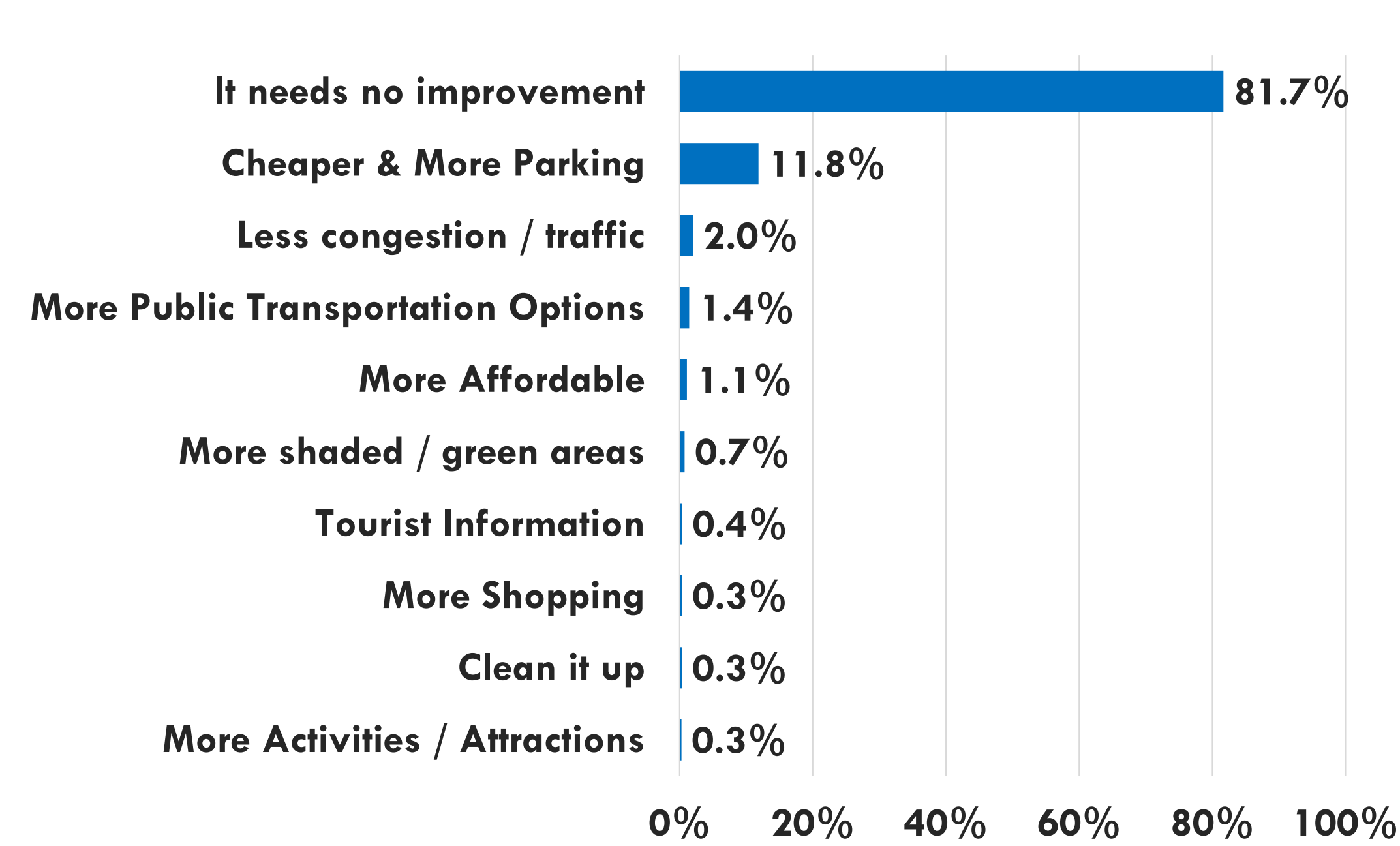
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Beaches / Ocean	60.7%	49.4%	49.1%
Scenic Beauty	26.9%	25.3%	29.1%
Everything	27.2%	30.3%	22.0%
Tropical Climate / Warm Weather	27.3%	21.7%	13.7%
Attractions (Museums, Aquarium, etc.)	6.1%	4.5%	16.0%
Entertainment / Variety of Fun Activities	9.1%	8.9%	12.9%
Relaxing Atmosphere / Ambiance	10.8%	10.5%	8.3%
Friendly People	11.0%	9.9%	6.8%
Food / Restaurants & Bars	6.6%	4.2%	6.8%
Clean	9.4%	2.4%	4.1%
Accessible / Convenient / Walkable	10.2%	4.2%	4.0%
Shopping	2.5%	2.9%	3.4%
Safe	1.8%	1.1%	1.6%
Family Friendly	1.9%	2.1%	0.6%
Great Location / Easy to get to	2.8%	1.4%	0.6%
Sample Size:	391	174	286

ATTRACTIONS OR SERVICES THAT WOULD ENHANCE THE DESTINATION EXPERIENCE

Nearly nine-in-ten visitors reported that the destination needs no improvement when asked what services or additional attractions would enhance their overall experience in the St. Pete/Clearwater area (81.7%). Of the specific suggestions provided by visitors, the top cited were cheaper & more parking (11.9% -- up from 7.9% in Q2 2021) and less congestion/traffic (2.0% -- down from 4.2% in Q2 2021). Day trip visitors were the likeliest to suggest cheaper & more parking (15.8% -- up from 10.5% in Q2 2021).

Figure 24:Additional Attractions or Services (Unaided)



Question: In your opinion, what services or additional attractions would most enhance your experience in the St. Pete/Clearwater Area? Base: All Respondents. 1,207 responses.

Detail by Traveler Segment

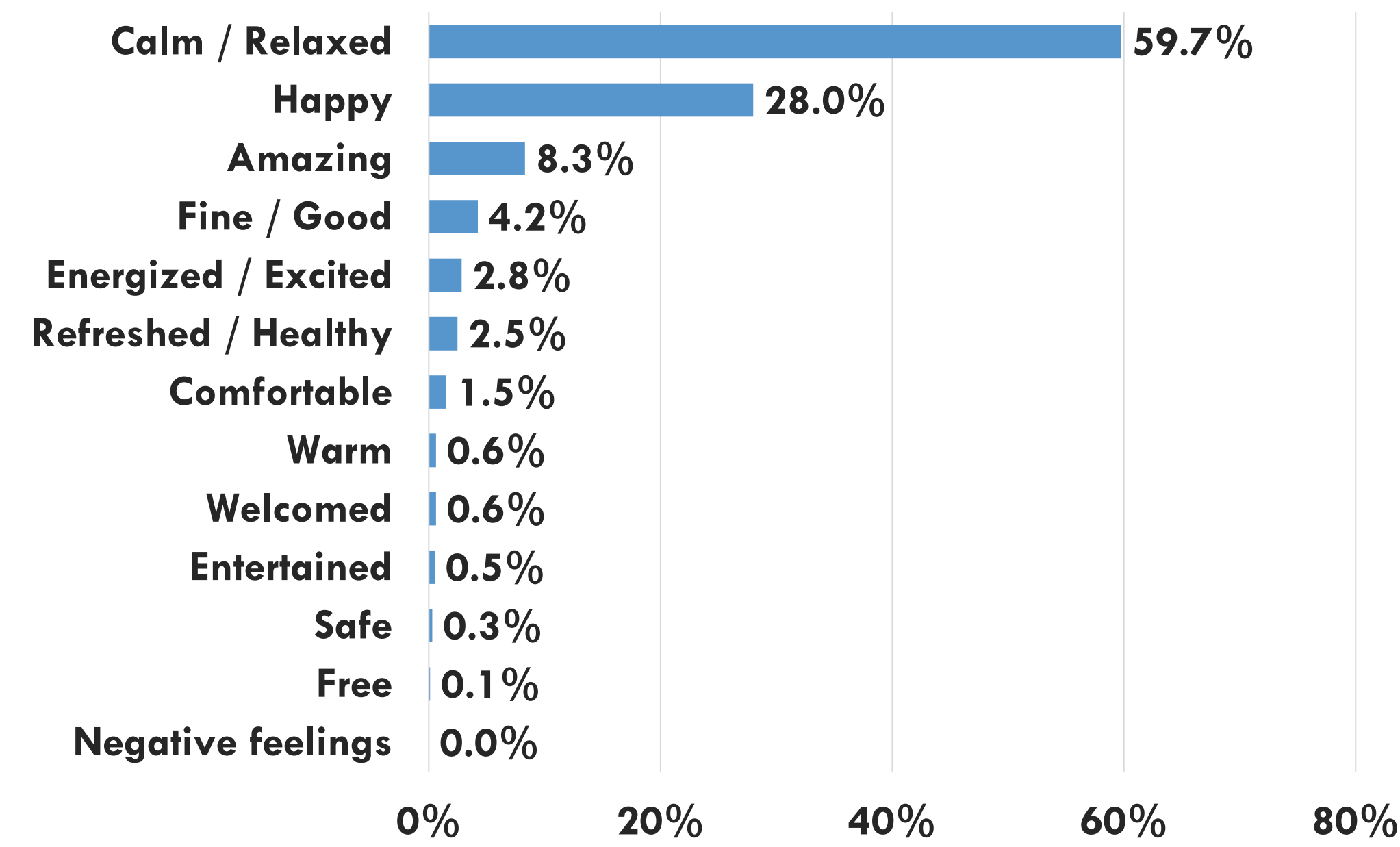
	Hotel	VFR	Day Trip
It needs no improvement	83.2%	86.0%	79.0%
Cheaper & More Parking	5.0%	7.4%	15.8%
Less congestion / traffic	2.7%	3.4%	1.6%
More Public Transportation Options	3.0%	1.3%	1.0%
More Affordable	2.1%	0.7%	0.9%
More shaded / green areas	0.4%	0.5%	1.0%
Tourist Information	0.2%	0.7%	0.3%
More Shopping	0.2%	0.7%	0.4%
Clean it up	0.2%	1.5%	0.0%
More Activities / Attractions	0.2%	0.0%	0.4%
Sample Size:	386	170	283

FEELINGS IN ST. PETE/CLEARWATER

The St. Pete/Clearwater area most commonly conjured feelings of calmness/relaxation (59.7% - up from 47.2% in Q2 2021) and happiness (28.0%) in visitors.

Hotel guests were the likeliest to say they felt calm & relaxed (69.5%) and amazing 10.2%) while in the destination..

Figure 25: Feelings in St. Pete/Clearwater Area (Unaided)



Question: What one word or phrase best describes how you feel in the St. Pete/Clearwater area? Base: All Respondents. 1,217 responses.

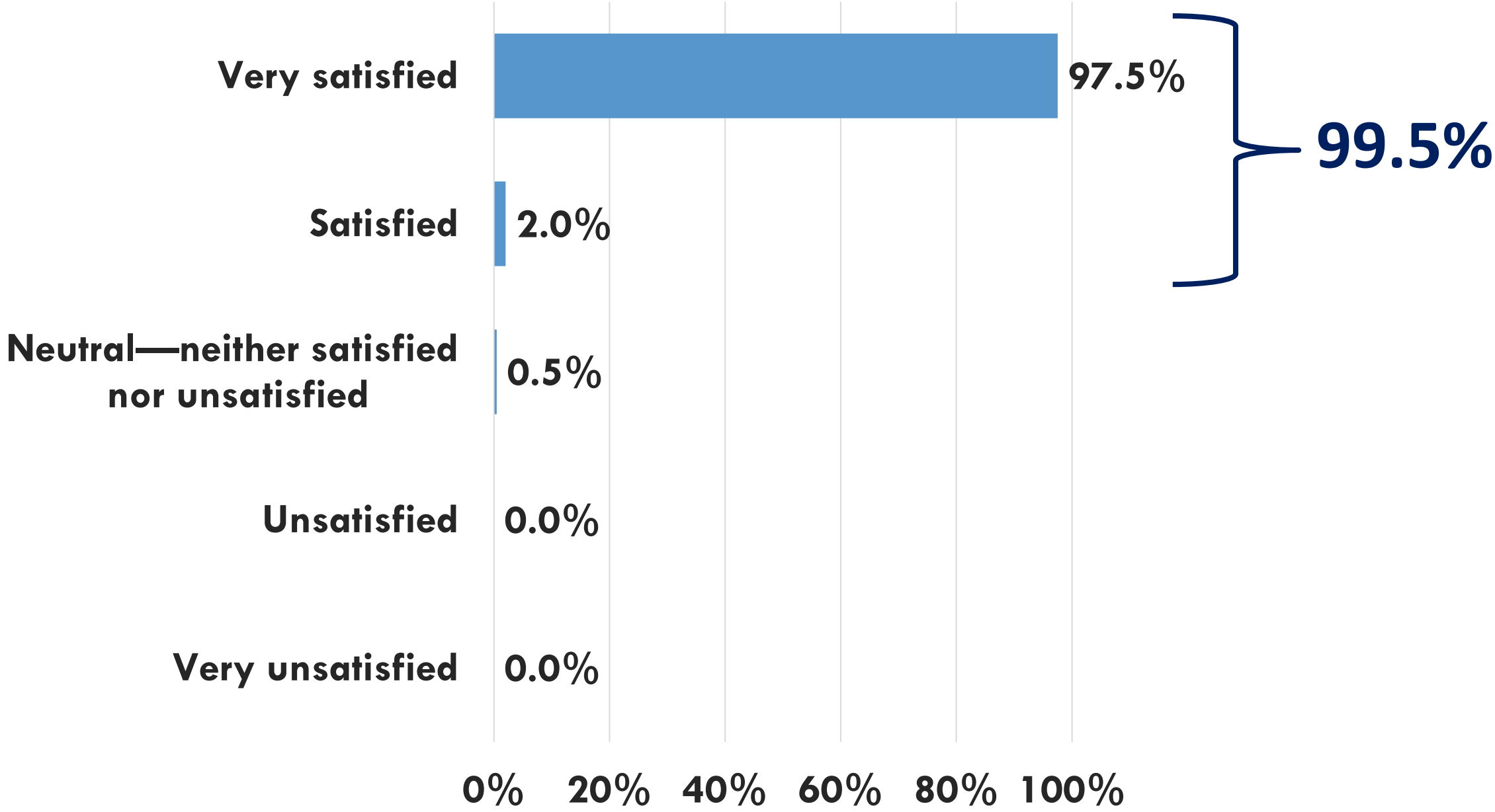
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Calm / Relaxed	69.5%	55.4%	52.5%
Happy	21.0%	36.7%	31.3%
Amazing	10.2%	5.8%	9.1%
Fine / Good	2.4%	3.9%	5.7%
Energized / Excited	2.4%	2.6%	3.2%
Refreshed / Healthy	2.3%	2.7%	2.2%
Comfortable	2.1%	2.9%	1.3%
Warm	0.8%	2.2%	0.3%
Welcomed	0.8%	0.7%	0.6%
Entertained	0.4%	2.2%	0.3%
Safe	0.0%	0.7%	0.3%
Free	0.6%	0.0%	0.0%
Negative feelings	0.0%	0.0%	0.0%
Sample Size:	386	173	283

OVERALL SATISFACTION

Nearly all responding visitors were highly satisfied with their experience in the St. Pete/Clearwater area (99.5%). In fact, 97.5 percent said they were “very satisfied” -- up from 92.8 percent in Q2 2021.

Figure 26: Overall Satisfaction



Detail by Traveler Segment

	Hotel	VFR	Day Trip
Very satisfied	96.2%	98.9%	97.7%
Satisfied	3.8%	1.1%	1.6%
Neutral—neither satisfied nor unsatisfied	0.0%	0.0%	0.7%
Unsatisfied	0.0%	0.0%	0.0%
Very unsatisfied	0.0%	0.0%	0.0%
Sample Size:	390	175	285

Question: How satisfied are you with your experience in the St. Pete/Clearwater area on this trip? (Select one) Base: All Respondents. 1,222 responses.

LIKELIHOOD TO RECOMMEND

St. Pete/Clearwater visitors were highly likely to say they would recommend the St. Pete/Clearwater area as a travel destination to others.

Visitor rated their likelihood to recommend the destination a 9.9 out of 10 (vs. 9.8 out of 10 in Q2 2021).

Figure 27: Likelihood to Recommend St. Pete/Clearwater Area



Question: How likely are you to recommend the St. Pete/Clearwater area as a place to visit to other travelers? Please use a 10-point scale where 1 represents “Definitely will NOT recommend” and 10 represents “Certain to recommend.” Base: All Respondents. 1, 217 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
10—Certain to Recommend	89.8%	97.9%	92.9%
9	6.2%	1.4%	3.6%
8	3.2%	0.4%	3.0%
7	0.5%	0.2%	0.3%
6	0.0%	0.0%	0.3%
5	0.0%	0.0%	0.0%
4	0.3%	0.0%	0.0%
3	0.0%	0.0%	0.0%
2	0.0%	0.0%	0.0%
1—Definitely WILL NOT Recommend	0.0%	0.1%	0.0%
Mean Score	9.8	9.9	9.9
Sample Size:	387	173	282

LIKELIHOOD TO RETURN

These highly satisfied visitors also reported an equally high likelihood to return to St. Pete/Clearwater in the future. In line with their visitor satisfaction and likelihood to recommend the destination as a place to visit to other travelers, the average visitor rated their likelihood to return to the destination a 9.7 out of 10 – slightly up from 9.6 out of 10 in Q2 2021.

Figure 28: Likelihood to Return to St. Pete/Clearwater Area



Question: How likely are you to return to the St. Pete/Clearwater area? Please use a 10-point scale where 1 represents “Definitely will NOT return” and 10 represents “Certain to return.”
Base: All Respondents. 1,203 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
10—Certain to Return	76.9%	95.1%	85.9%
9	8.3%	2.1%	5.0%
8	7.1%	1.2%	3.7%
7	4.9%	1.2%	2.7%
6	1.5%	0.0%	1.1%
5	0.9%	0.4%	1.3%
4	0.2%	0.0%	0.0%
3	0.0%	0.0%	0.0%
2	0.2%	0.0%	0.3%
1—Definitely WILL NOT Return	0.0%	0.0%	0.0%
Mean Score	9.5	9.9	9.7
Sample Size:	316	323	406

A photograph of four young adults (two men and two women) sitting on a sandy beach. They are all smiling and holding large, colorful tropical drinks with umbrellas and straws. The drinks are from a brand called 'SLOPPY JOE'S'. The background shows a beach with some buildings in the distance. The image is overlaid with a semi-transparent dark grey rectangle containing white text.

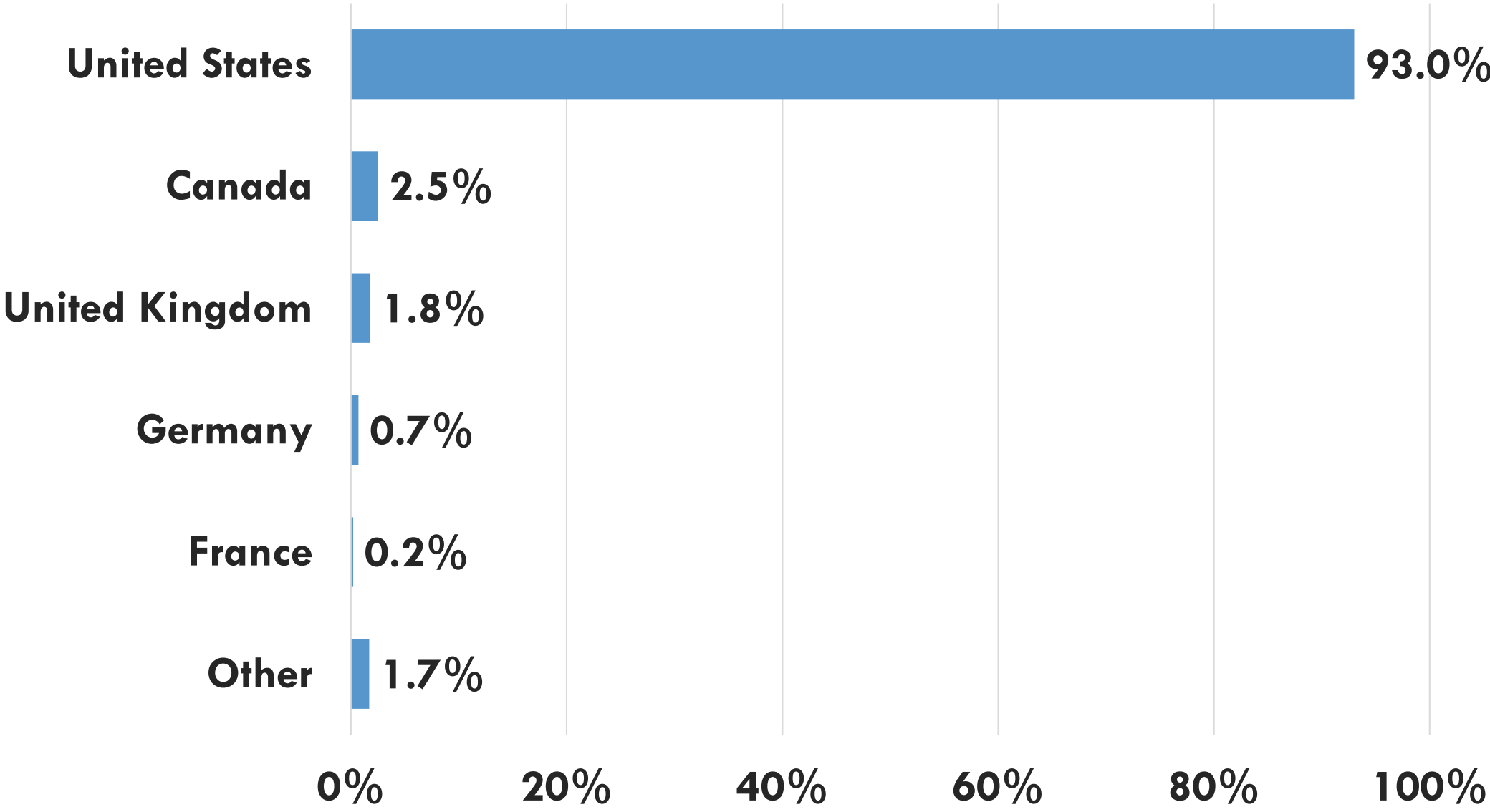
Q2 2022

Point of Origin &
Demographic Profile

POINT OF ORIGIN: COUNTRY

Compared to Q2 2021, the St. Pete/Clearwater area saw an increase in international visitors in Q2 2022 (7.0% vs. 0.5% in Q2 2021). The destination was visited by international travelers from Canada (2.5%), the United Kingdom (1.8%), Germany (0.7%), and France (0.2%). 93.0 percent of all visitors surveyed resided in the United States.

Figure 29: Country of Origin



Question: In what country do you reside? Base: All Respondents.1,222 responses.

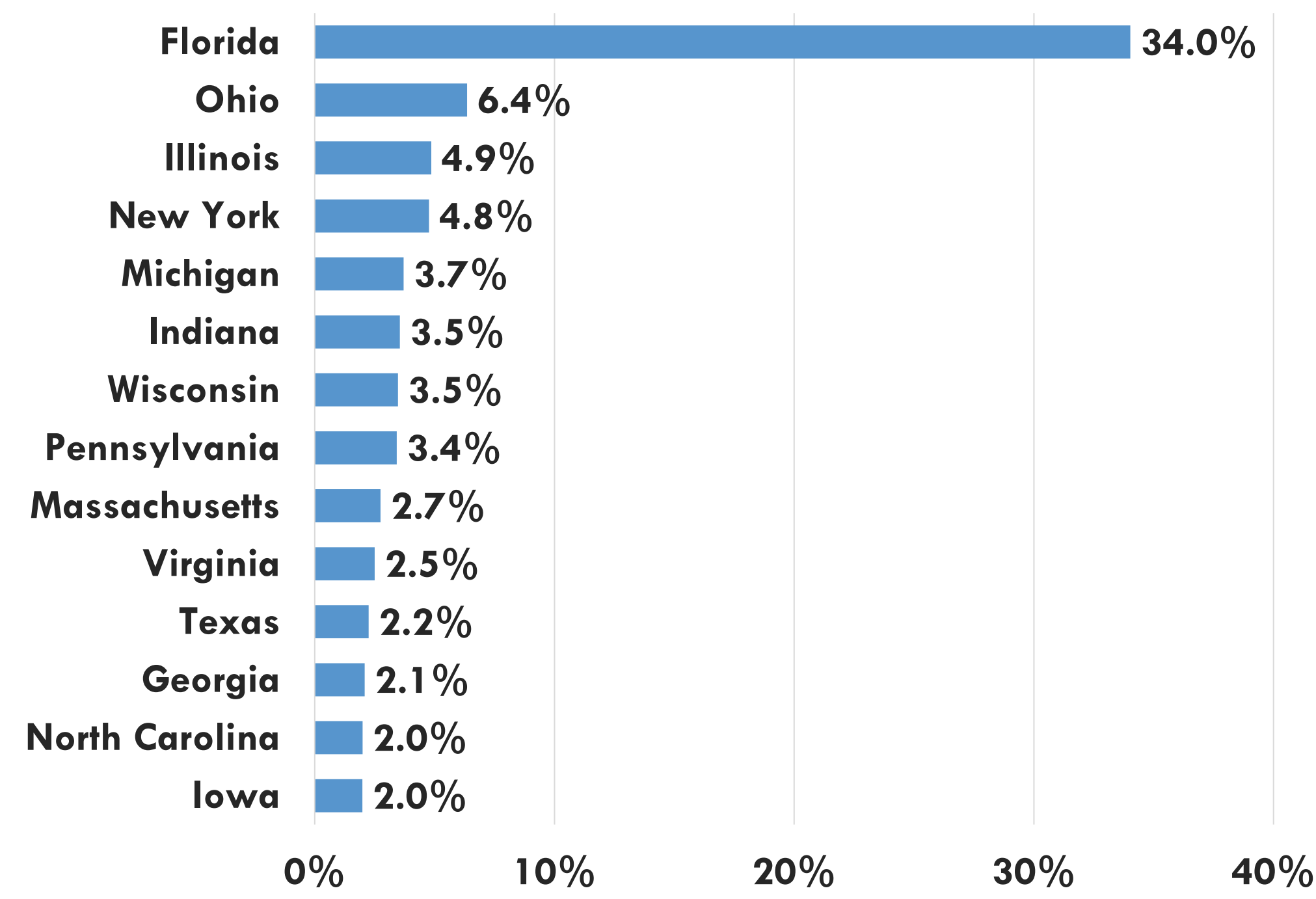
Detail by Traveler Segment

	Hotel	VFR	Day Trip
United States	92.9%	90.3%	93.5%
Canada	2.1%	6.0%	1.6%
United Kingdom	3.2%	0.9%	1.6%
Germany	0.6%	0.0%	1.0%
France	0.0%	0.0%	0.4%
Other	1.3%	2.8%	1.9%
Sample Size:	390	173	285

POINT OF ORIGIN: TOP STATES OF RESIDENCE (DOMESTIC VISITORS)

One-third of all domestic visitors surveyed in Q2 2022 were Florida residents (34.0%) and 66.0% of domestic visitors were out of state residents (vs. 61.9% in Q2 2021). Ohio (6.4%), Illinois (4.9%), New York (4.8%), Michigan (3.7%), Indiana (3.5%), Wisconsin (3.5%) and Pennsylvania (3.4%) contributed the largest proportions of out-of-state visitors. While day trippers were not surprisingly the most likely segment to be Florida residents (48.4), Hotel guests was the segment likeliest to be from Ohio (9.7%) and Illinois (6.7%). The top out-of-state VFR visitors were from New York (9.4%).

Figure 30: State of Origin



Question: What is your zip/postal code? Base: Domestic respondents. 1,101 responses.

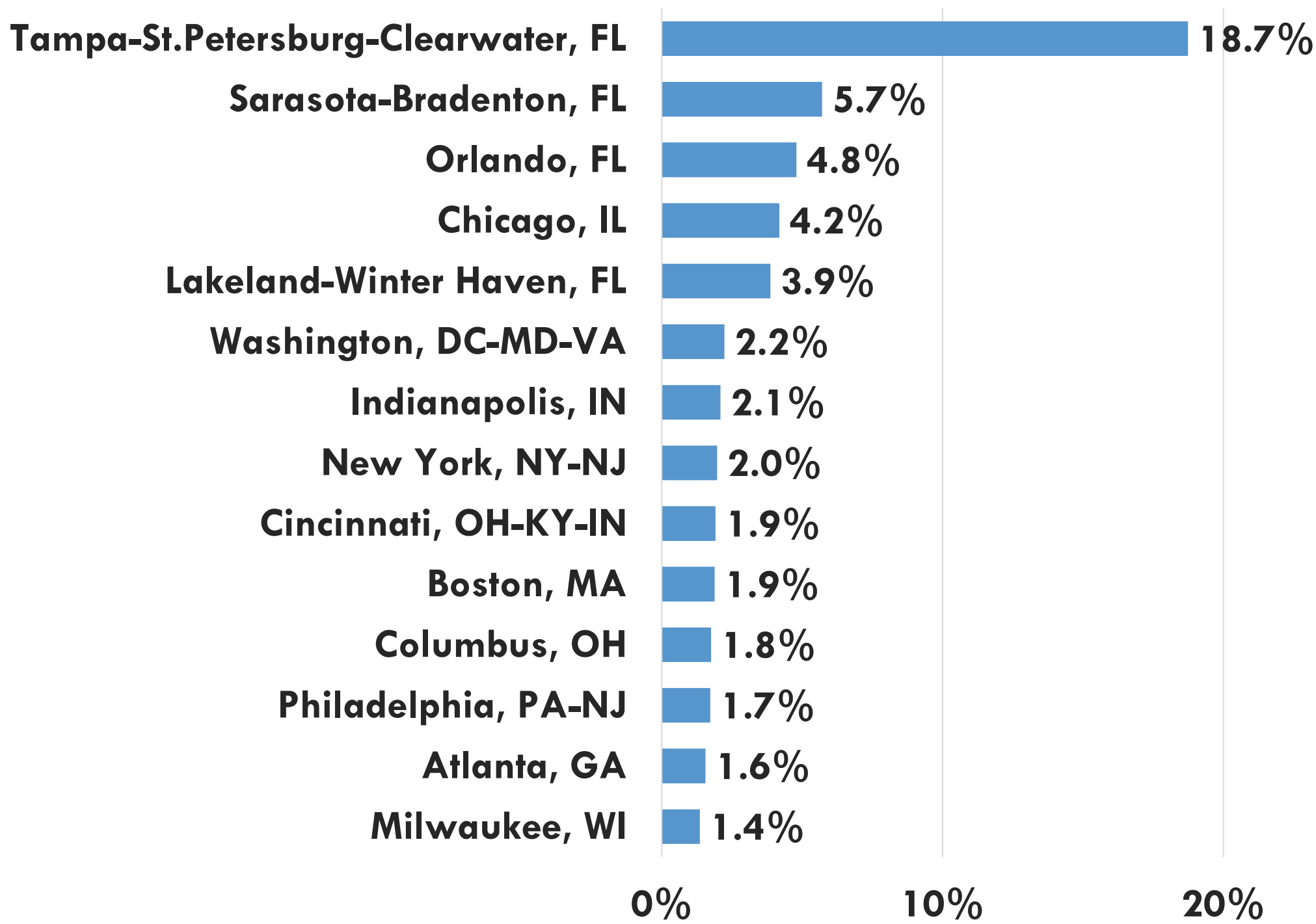
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Florida	13.4%	14.7%	48.4%
Ohio	9.7%	6.3%	3.8%
Illinois	6.7%	6.2%	3.1%
New York	3.2%	9.4%	4.5%
Michigan	5.7%	6.6%	2.2%
Indiana	4.0%	2.1%	2.9%
Wisconsin	4.5%	3.4%	3.0%
Pennsylvania	4.7%	5.9%	2.8%
Massachusetts	3.2%	5.9%	1.9%
Virginia	2.5%	5.4%	1.7%
Texas	4.8%	2.8%	1.4%
Georgia	3.2%	2.4%	1.7%
North Carolina	0.7%	3.0%	2.4%
Iowa	1.9%	1.6%	2.0%
Sample Size:	358	153	259

POINT OF ORIGIN: MSA (DOMESTIC VISITORS)

The top three Florida visitor markets in Q2 2022 were Tampa (18.7%), Sarasota/Bradenton (5.7%) and Orlando (4.8%). Out-of-state markets were primarily Chicago (4.2%), Washington, DC-MD-VA (2.2%), Indianapolis (2.1%) and New York, NY-NJ (2.0%)

Figure 31: MSA



Detail by Traveler Segment

	Hotel	VFR	Day Trip
Tampa-St. Petersburg-Clearwater, FL	2.7%	6.3%	28.1%
Sarasota-Bradenton, FL	0.0%	1.2%	8.9%
Orlando, FL	4.1%	1.7%	6.2%
Chicago, IL	5.5%	5.7%	3.1%
Lakeland-Winter Haven, FL	1.3%	0.6%	5.6%
Washington, DC-MD-VA	1.0%	3.9%	2.4%
Indianapolis, IN	2.0%	1.0%	2.0%
New York, NY-NJ	1.1%	5.4%	2.0%
Cincinnati, OH-KY-IN	1.6%	1.6%	2.0%
Boston, MA	3.2%	5.1%	0.9%
Columbus, OH	2.4%	0.6%	1.2%
Philadelphia, PA-NJ	2.3%	3.5%	1.5%
Atlanta, GA	2.5%	1.6%	1.1%
Milwaukee, WI	1.5%	0.0%	1.6%
Sample Size:	301	128	234

Question: What is your zip/postal code? Base: Domestic respondents. 940 responses.

DEMOGRAPHIC PROFILE

The following presents the demographic profile for all St. Pete/Clearwater area visitors surveyed in Q2 of 2022.



Average Age

47.5 years old



Household Income

\$110,906



Ethnicity

Caucasian – 86.2%

Latino / Hispanic – 5.4%

Black/African-American – 3.2%



Gender*

Female: 77.6%

Male: 21.9%



Marital Status

Single: 21.4%

Married/partnered: 68.4%

Children under 18: 21.6%



Orientation

Heterosexual – 95.7%

LGBTQ – 1.2%

Other – 0.1%

**Important Note: The gender breakout displayed above accurately reflects the profile of visitors who completed the Visitor Intercept Survey in-market but may not reflect the average ratio of female and male visitors. It should be noted that female visitors have been statistically more likely than male visitors to complete the survey in-market.*

DEMOGRAPHIC PROFILE BY VISITOR SEGMENT

The following presents the demographic profiles for place of stay visitor segments surveyed in Q2 of 2022.

	Hotel	VFR	Day Trip
Female	73.9%	72.9%	78.9%
Male	25.8%	26.4%	20.4%
Mean Age	48.3	48.2	47.1
Single	15.1%	27.5%	25.3%
Married	78.4%	60.9%	62.7%
Has Children	23.4%	16.7%	20.2%
Annual Household Income	\$134,046	\$105,226	\$99,335

	Hotel	VFR	Day Trip
Caucasian	91.0%	92.9%	82.3%
Latino/Hispanic	4.2%	1.1%	6.8%
Black/African-American	0.9%	1.4%	4.6%
Asian/Pacific Islander	1.5%	0.7%	1.4%
American Indian/Alaska Native	0.4%	0.0%	0.3%
Other	1.8%	2.6%	2.4%
Heterosexual	97.3%	95.6%	95.1%
LGBTQ	0.8%	1.1%	1.2%