Pinellas County – March 2022

Overview & Methodology

This online report presents 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 online report presents the top-line survey data collected from October 2017 onward and collection is still ongoing.

Data presented within this report is weighted to accurately reflect the overall population of St. Pete/Clearwater area visitors. The total number of completed surveys from Pinellas County visitors for March 2022 was 401 surveys.

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 and events:

- 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
- TradeWinds Island Grand
- The James Museum
- Wyndham Grand Clearwater Beach

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Research Objectives

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

- Detailed trip characteristics
  (i.e. 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
- Travel planning resources used by St. Pete/Clearwater area visitors
- Visitor satisfaction
- Visitor demographics

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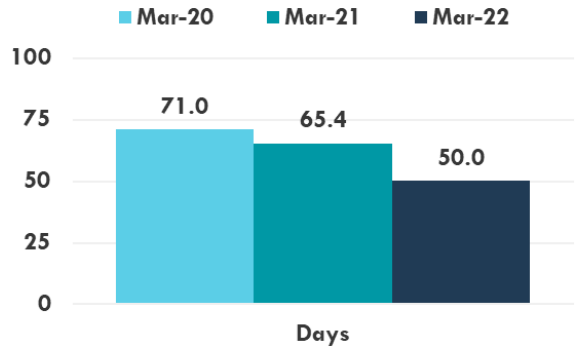
KEY THINGS TO KNOW

VISIT ST. PETE/CLEARWATER *March 2022*

Destination Analysts
DO YOUR RESEARCH

Average Time Between Decision to Visit & Arrival



Average Daily Spending

$263.51
Mar-22

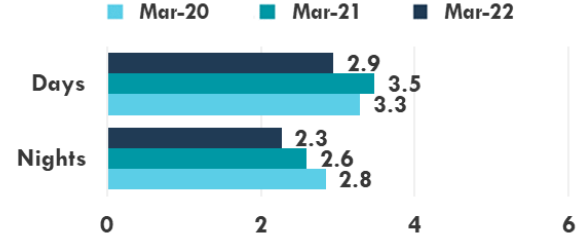
$301.22	$201.84
Mar-21	Mar-20

Travel Party Size

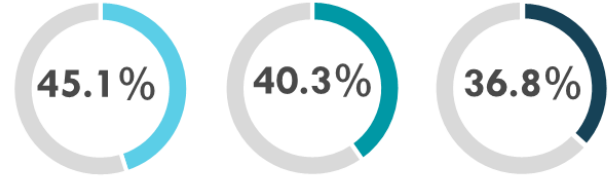
2.1
Mar-22

Mar-21	2.7
Mar-20	2.6

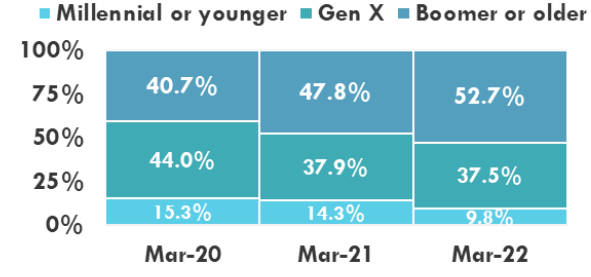
Average Days & Nights



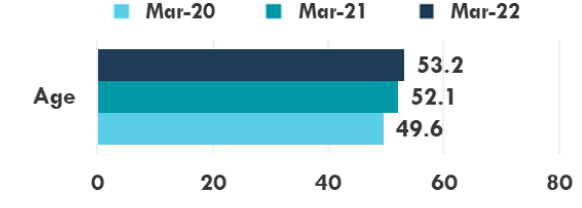
Percent Staying Overnight



Generations



Average Age



Average Income

$105,512
Mar-22

Mar-21	$113,363
Mar-20	$109,722

Key Things to Know - March 2022

The following is a summary of the most significant changes seen in the visitor profile in the month of March 2022

- **This month, vacation became the top primary reason for visiting the St. Pete/Clearwater area over visiting friends or family in the area.**
    - In March 2022, 45.9 percent of visitors said vacation was their primary reason for visiting.

- **Due to increased gas prices nationally, the average visitor in March spent $19.76 per day on gas, parking, and local transportation while in the St. Petersburg/Clearwater Area.**
    - Reported spending has increased from an average of $19.74 in Q1 2022 compared to the $11.86 in Q4 2021. This is a $7.88 difference, an increase of 66.4%, in 2022 thus far when compared to the end of 2021.

- **Visiting the beach jumps to the top activity visitors participated in while visiting the St. Pete/Clearwater area which outperforms dining in restaurants during the month of March.**
    - March 2022, 79.3% of visitors reported visiting the beach. This follows the positive trend for March since tracking began.
        - Mar 22 = 79.3%
        - Mar 21 = 74.0%
        - Mar 20 = 61.7%
        - Mar 19 = 63.3%
        - Mar 18 = 55.7%
    - In March 2022, 77.7% of respondents dined in restaurants which decreases from 94.8% in March 2021.

- **The Dali Art Museum (10.0%), St. Pete Pier (8.1%) and the Orlando area theme parks (6.1%) were the top attractions respondents visited on their trip while Clearwater Beach (59.7%) and Madeira Beach (35.4%) were the two top communities that respondents visited in March 2022.**

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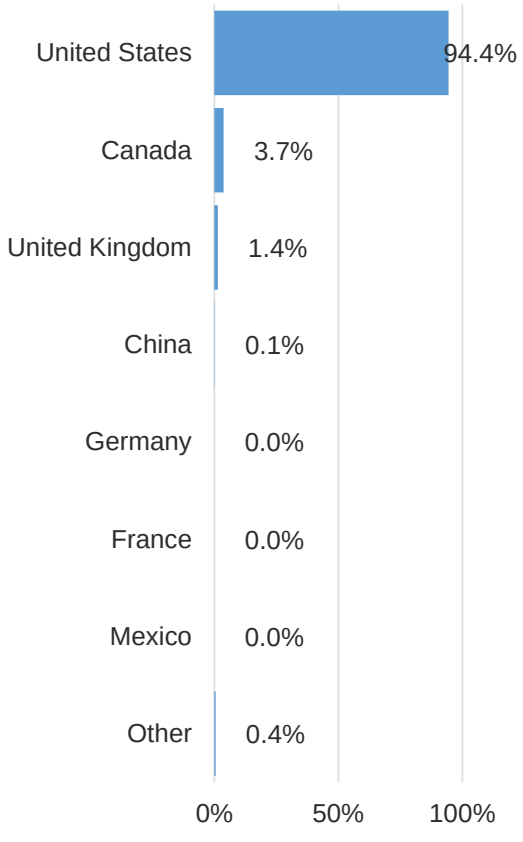
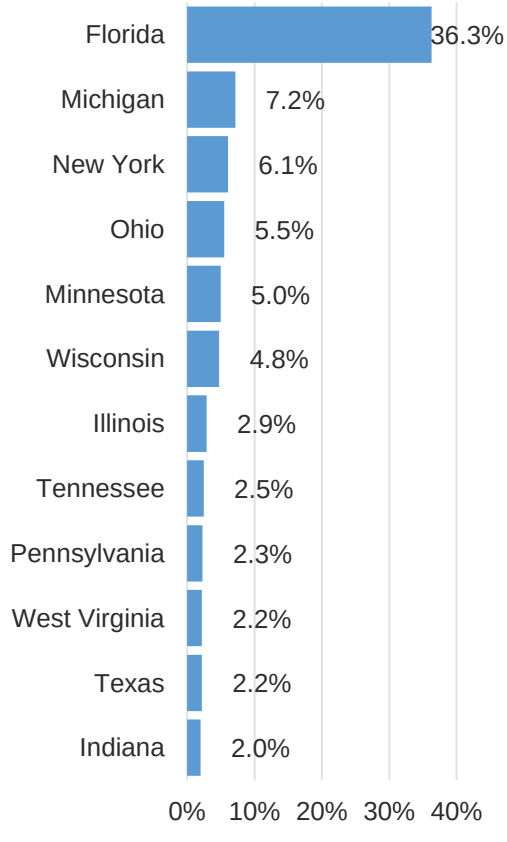
DETAILED FINDINGS

Point of Origin

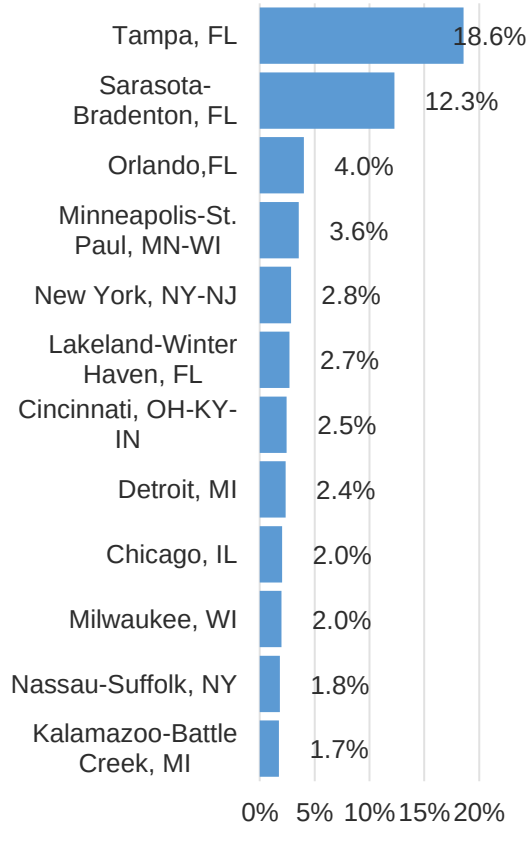
Country of Origin



State of Origin



MSA of Origin

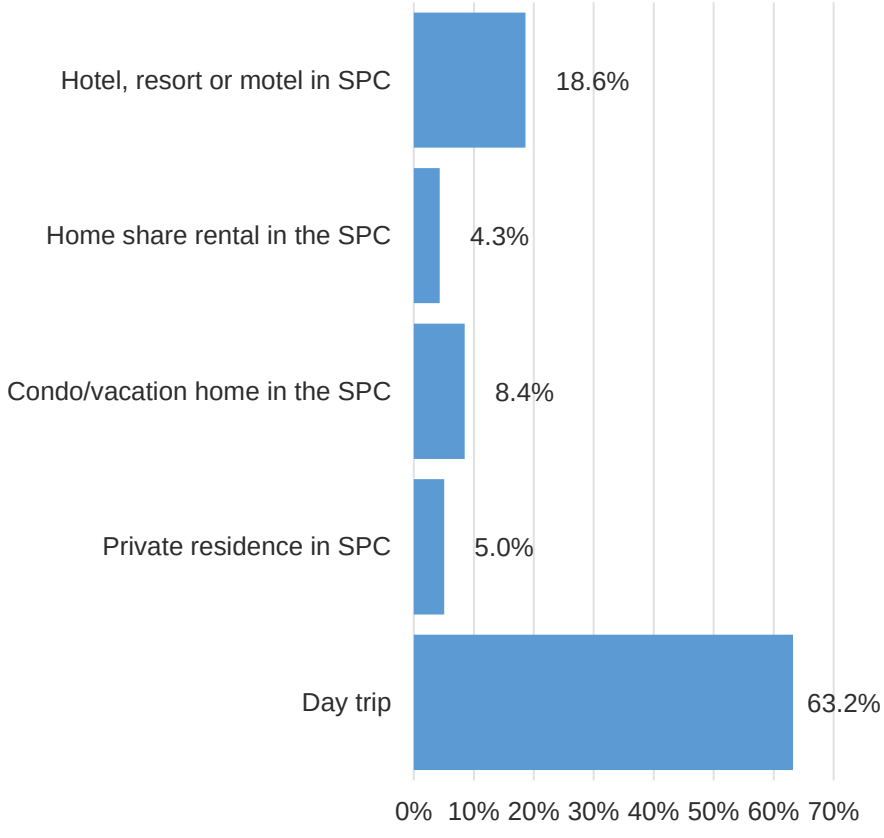


Base: 2022 - March 401 responses.

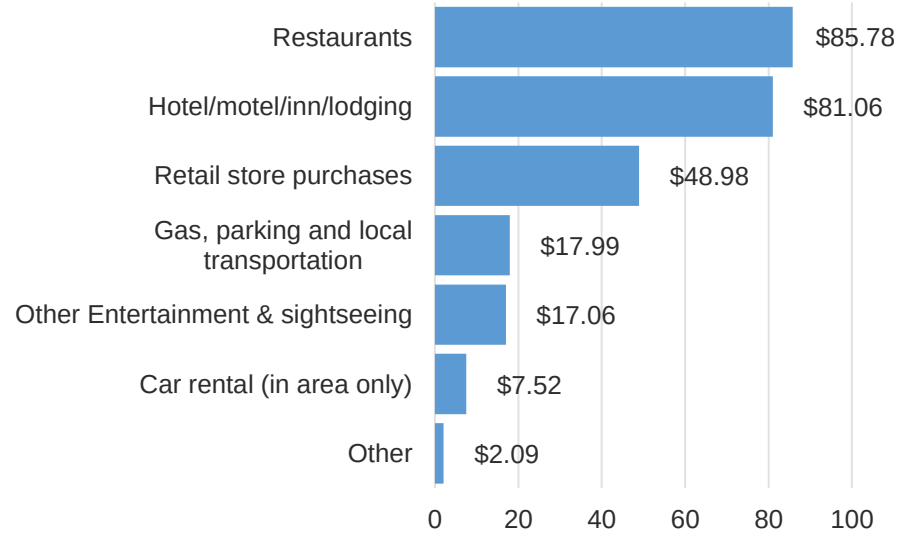
Destination Analysts

Lodging Type / Daily Spending in Market

Lodging Type



Daily Spending



Mean Travel Party Spending = $ 260.49

Avg # of People Covered by Spending = 2.60

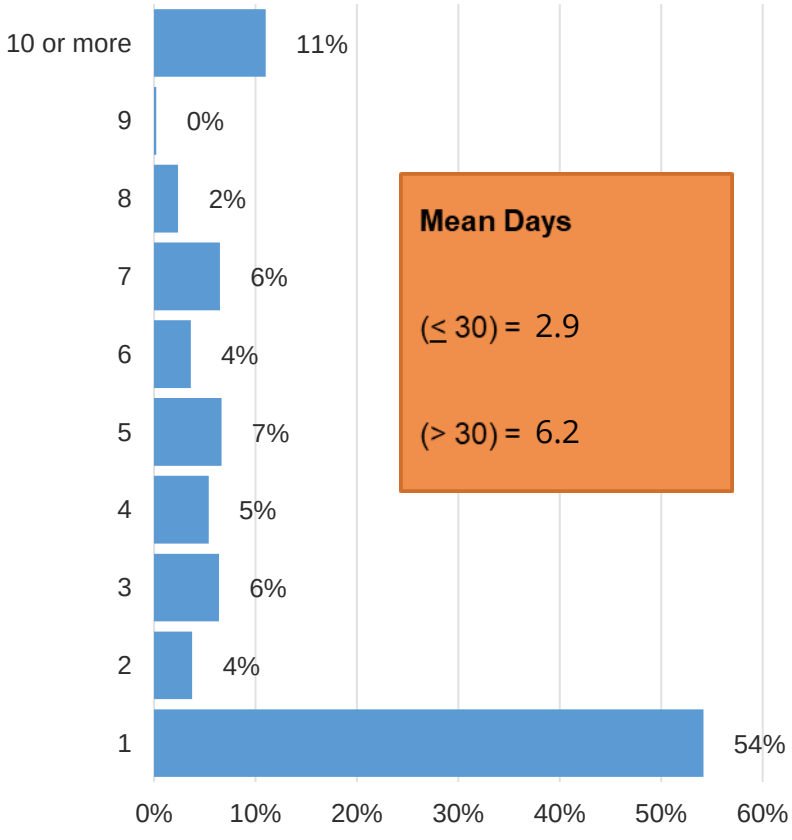
Mean Spending Per Person = $ 100.11

Base: 2022 - March 401 responses.

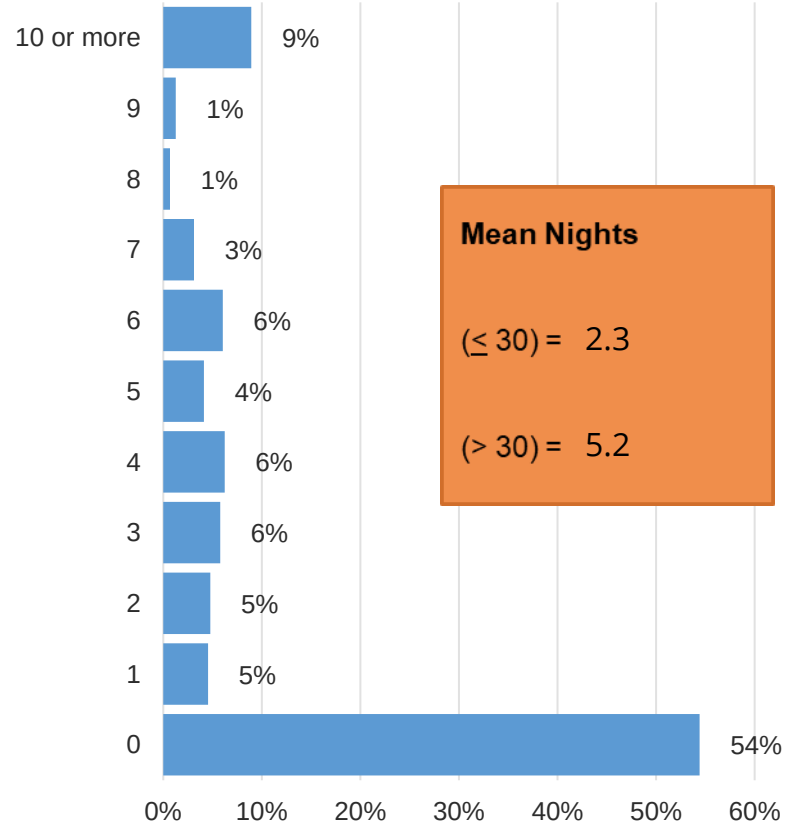
Destination Analysts

Days & Nights in St. Pete/Clearwater

Days in Market



Nights in Market

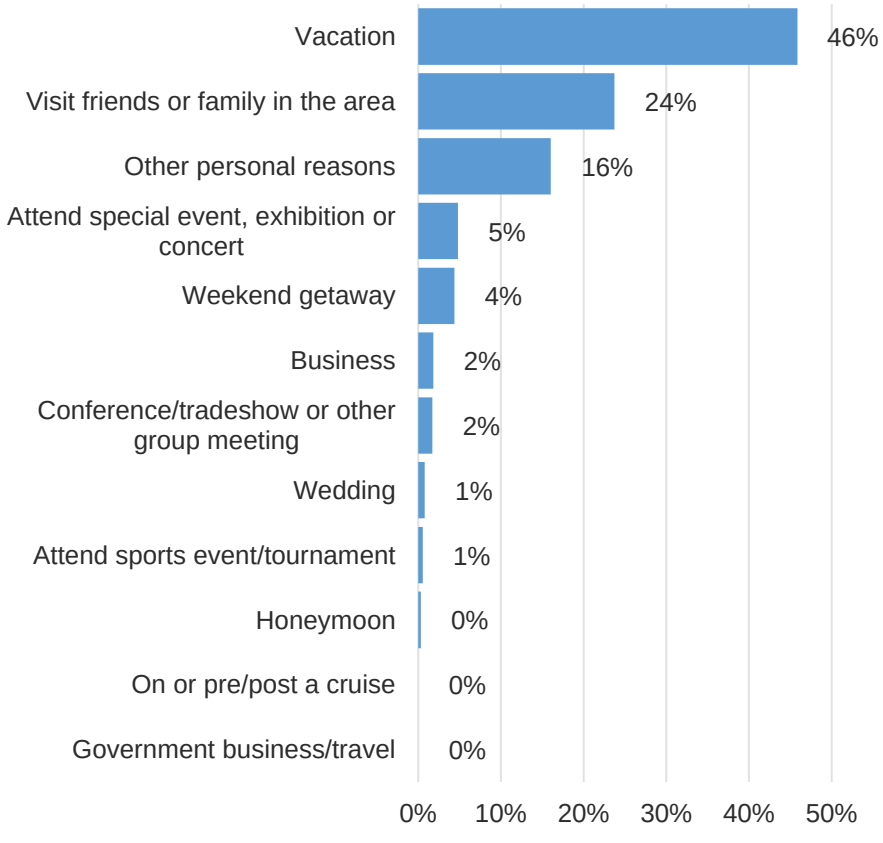


Base: 2022 - March 401 responses.

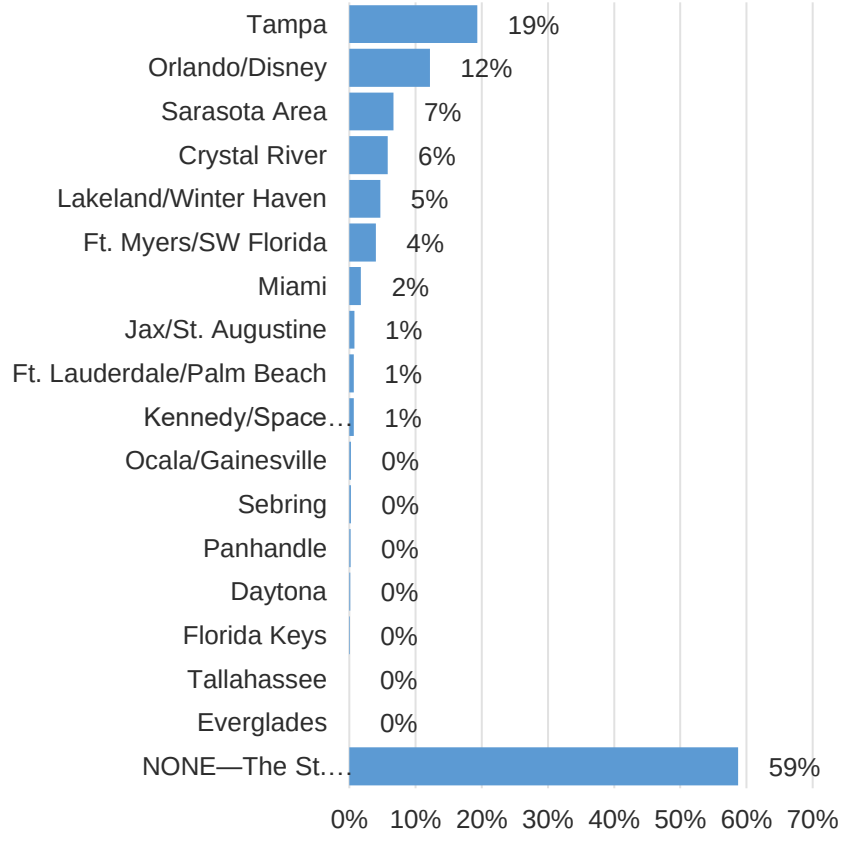
Destination Analysts

Primary Reason for Visit / Other Destinations Visited

Primary Reason for Visit



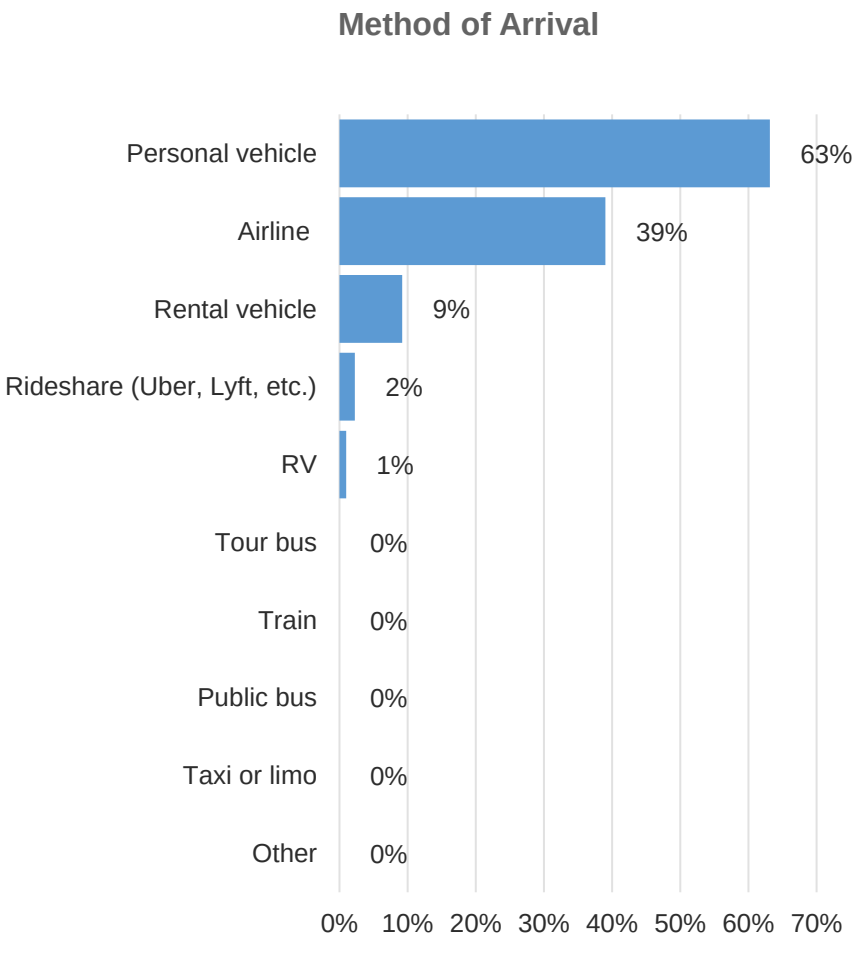
Other Destinations Visited on SPC Trip

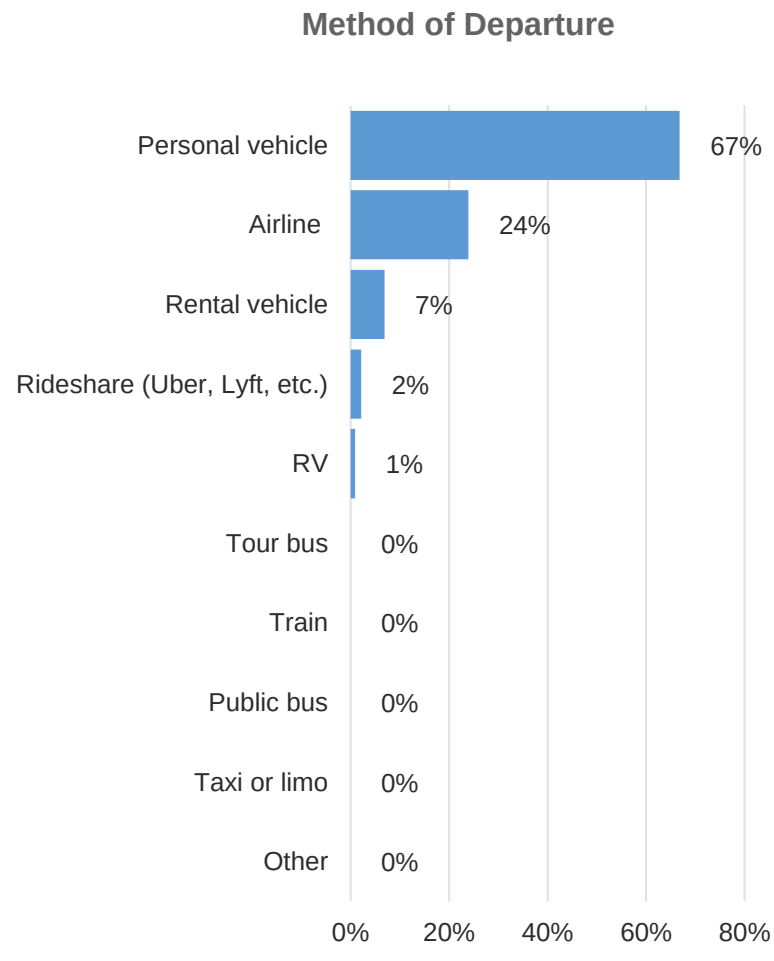


Base: 2022 - March 401 responses.

Destination Analysts

Method of Arrival / Arrival Airport & Airline



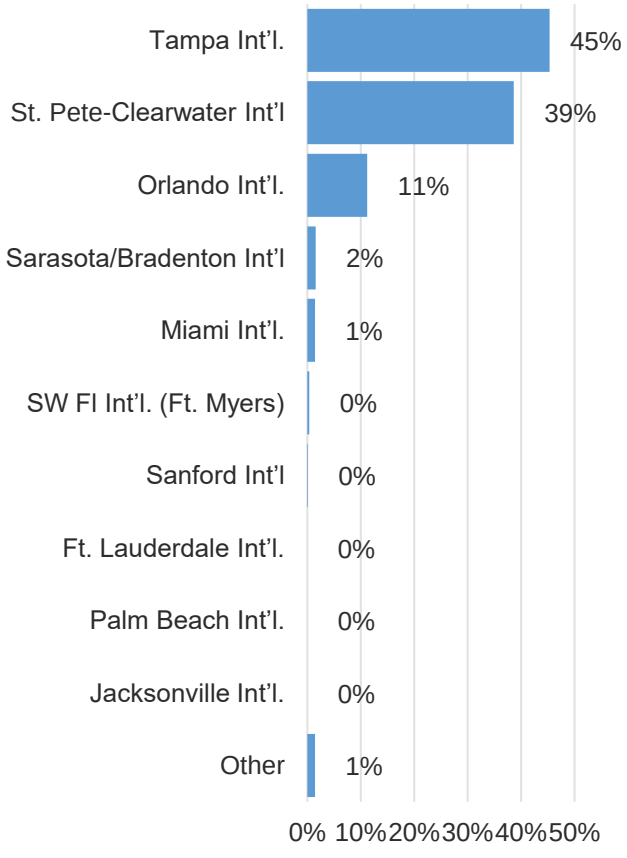


Base: 2022 - March 401 responses.

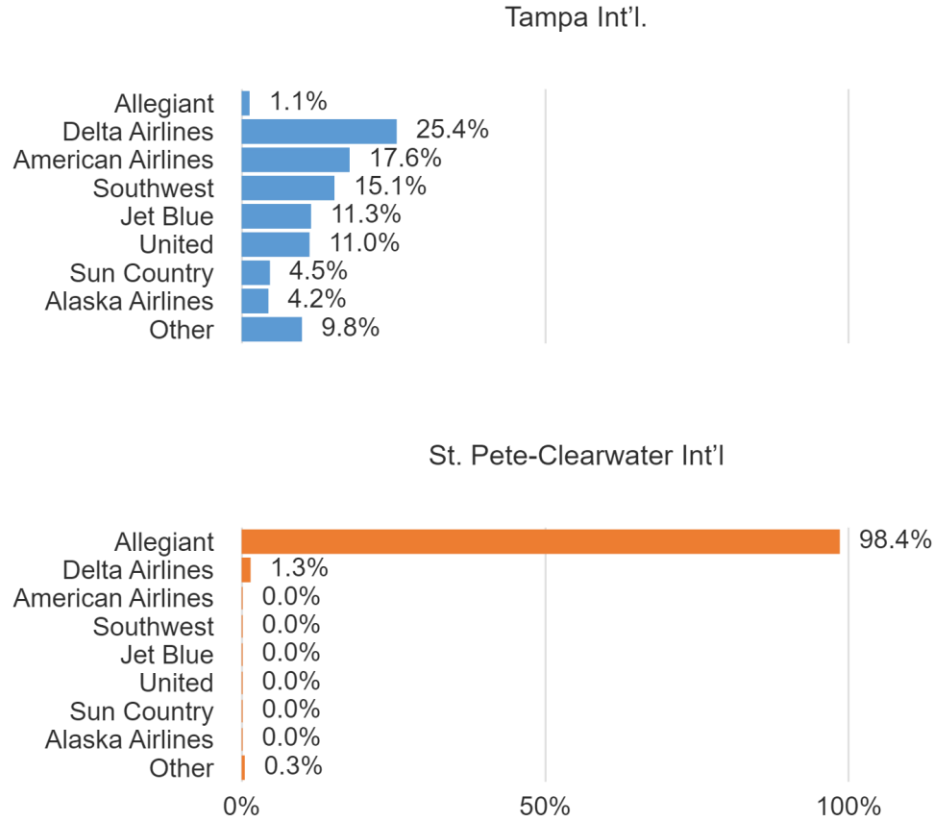
Destination Analysts

Method of Arrival / Arrival Airport & Airline

Airport of Arrival



Airline Used by Airport of Arrival

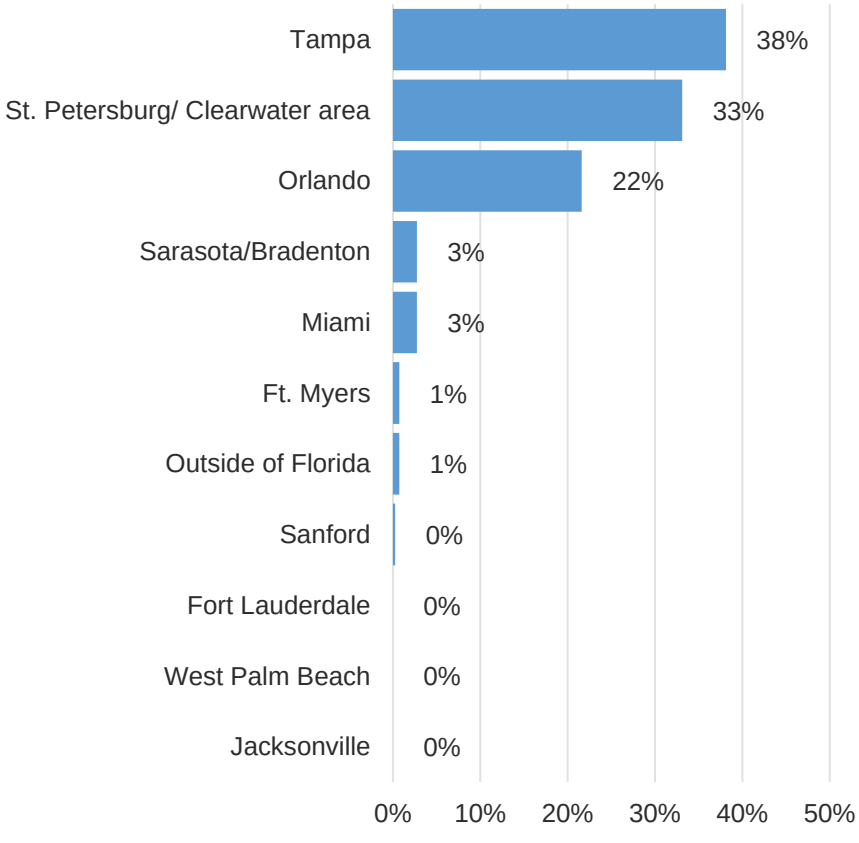


Base: 2022 - March 401 responses.

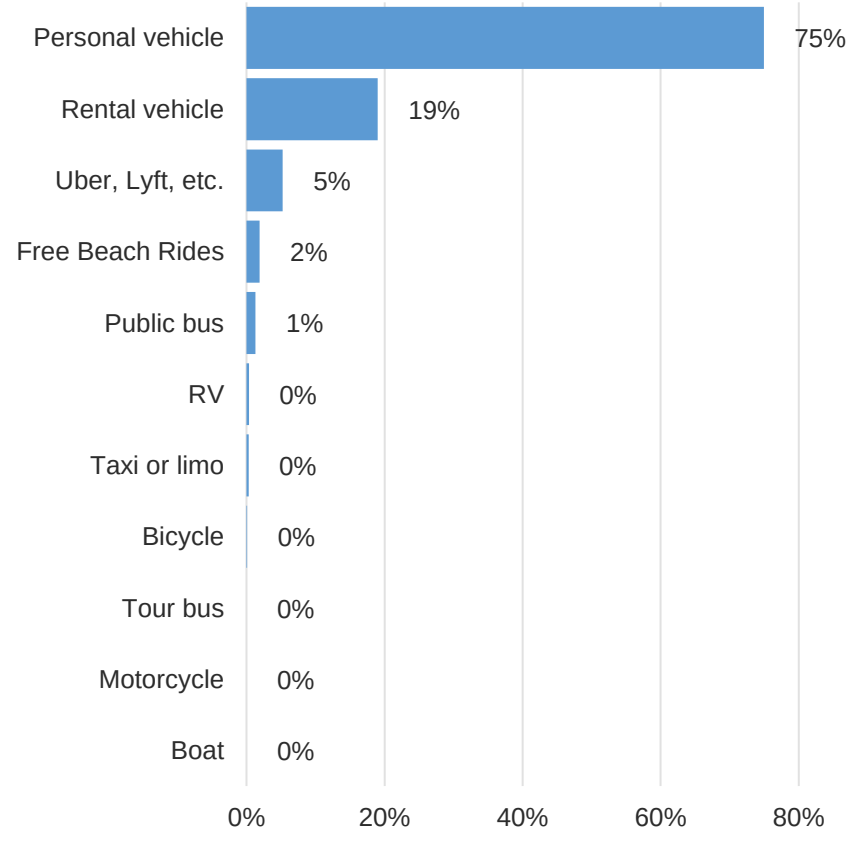
Destination Analysts

Rental Vehicle Pick-Up City / Transportation Used In-Market

Rental Vehicle Pick-Up City



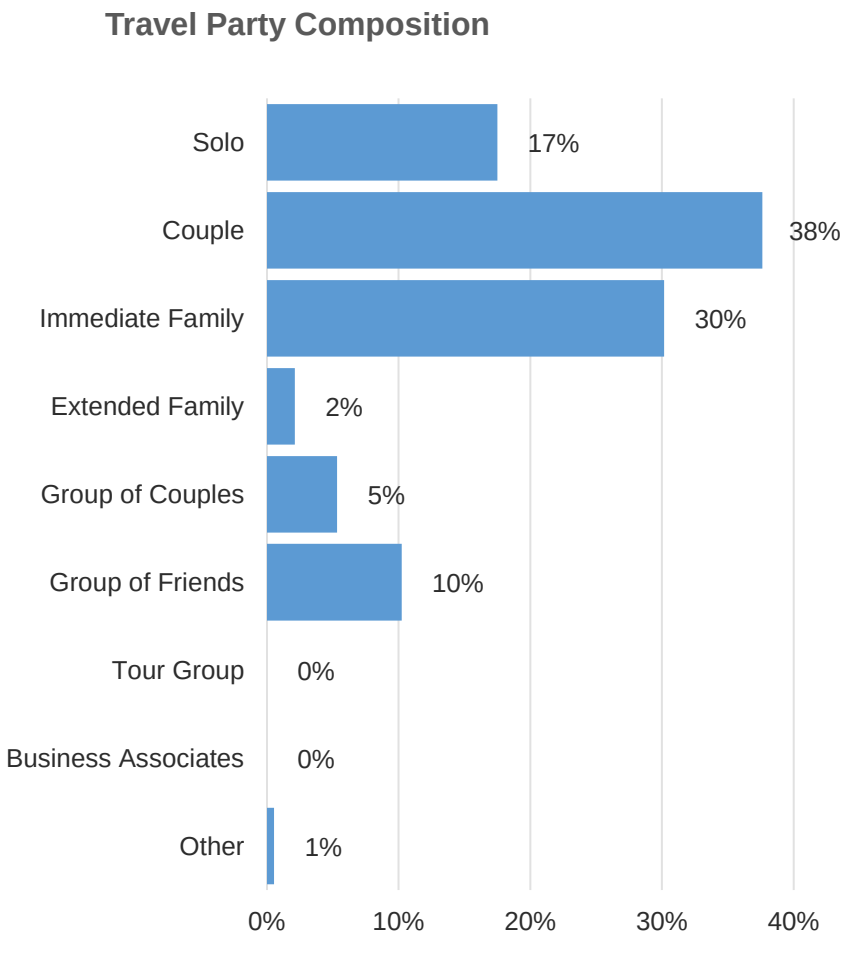
Transportation Used In-Market

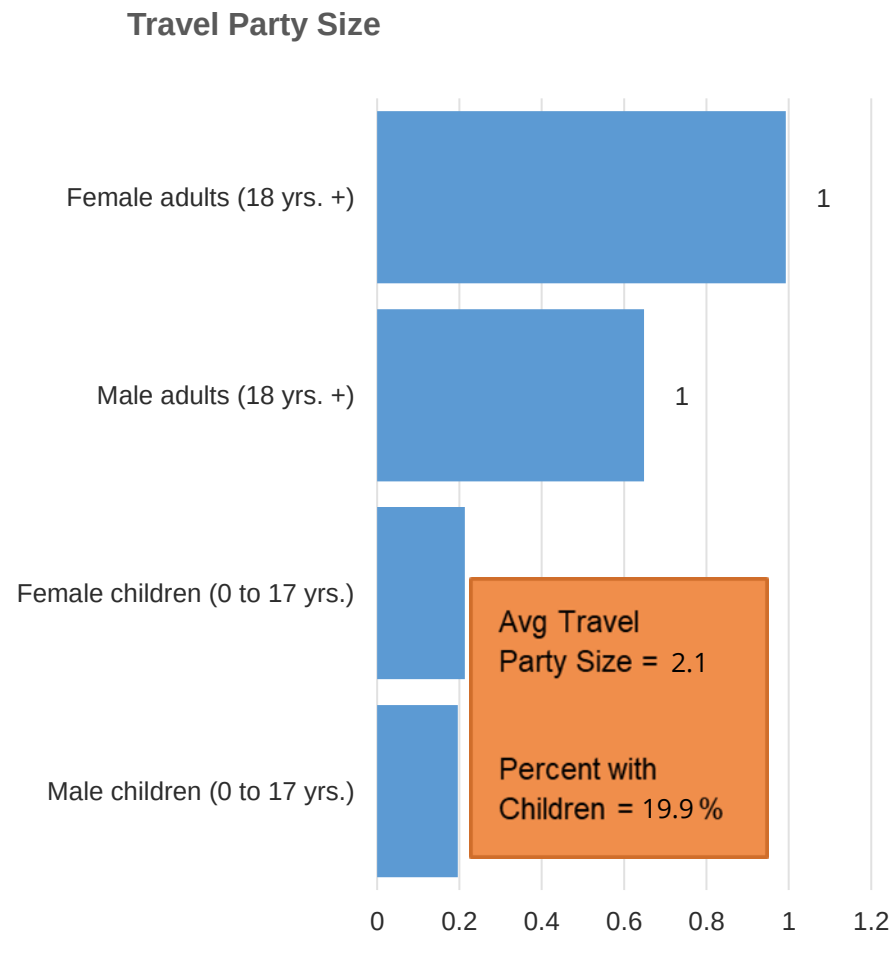


Base: 2022 - March 401 responses.

Destination Analysts

Travel Party Composition / Travel Party Size



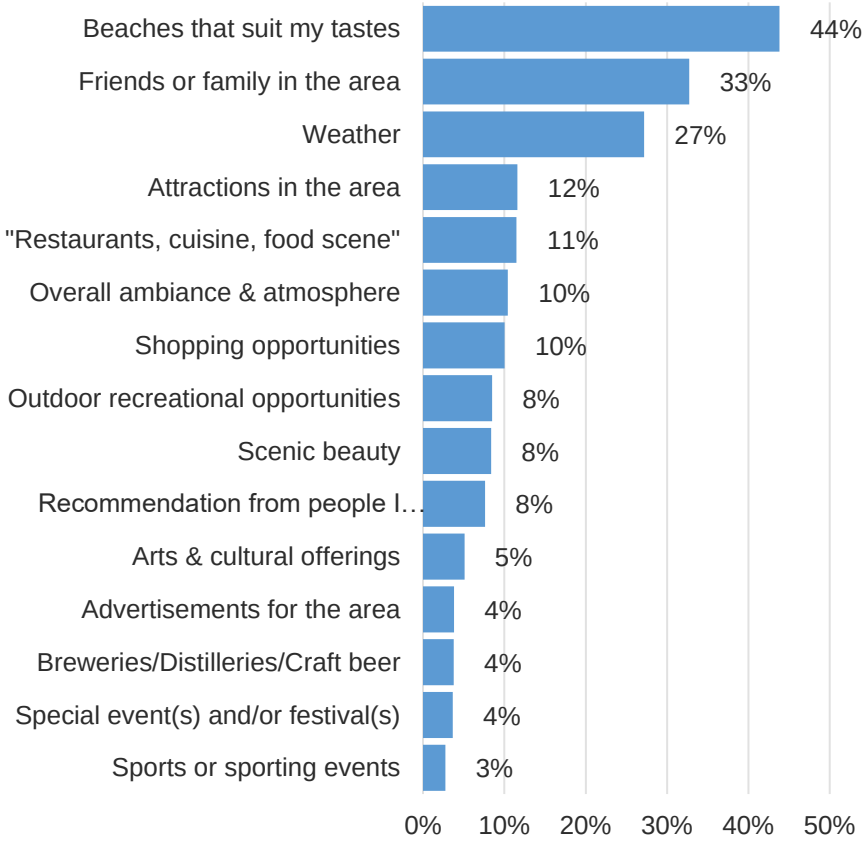


Base: 2022 - March 401 responses.

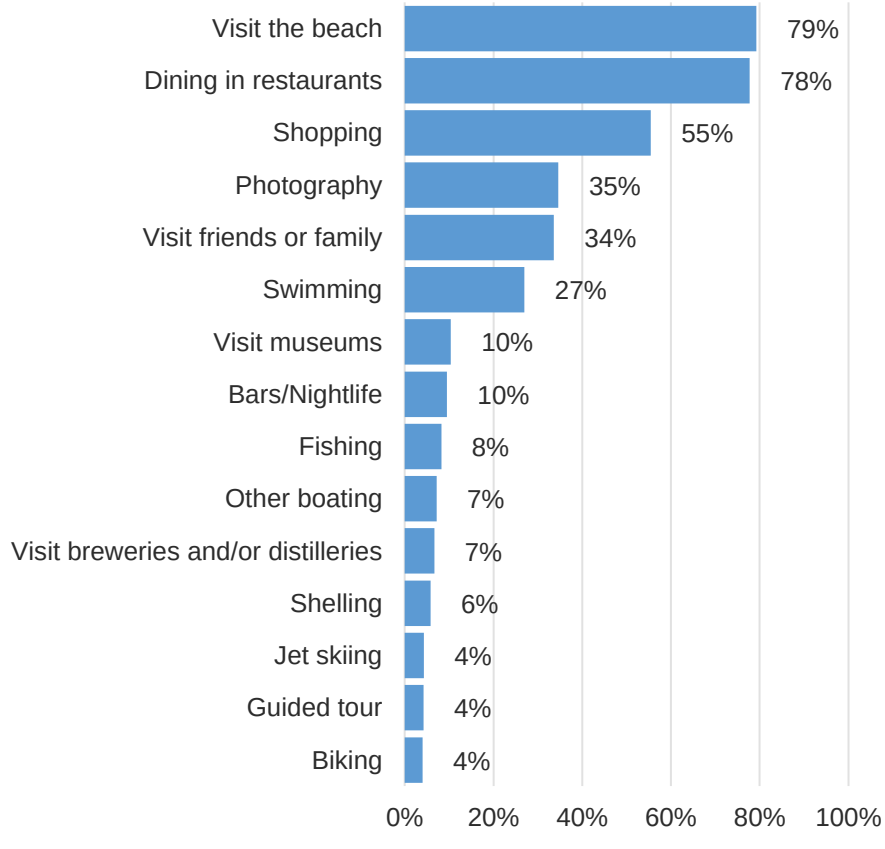
Destination Analysts

Important Factors to Destination Decision / Trip Activities

Important to Decision to Visit



Trip Activities

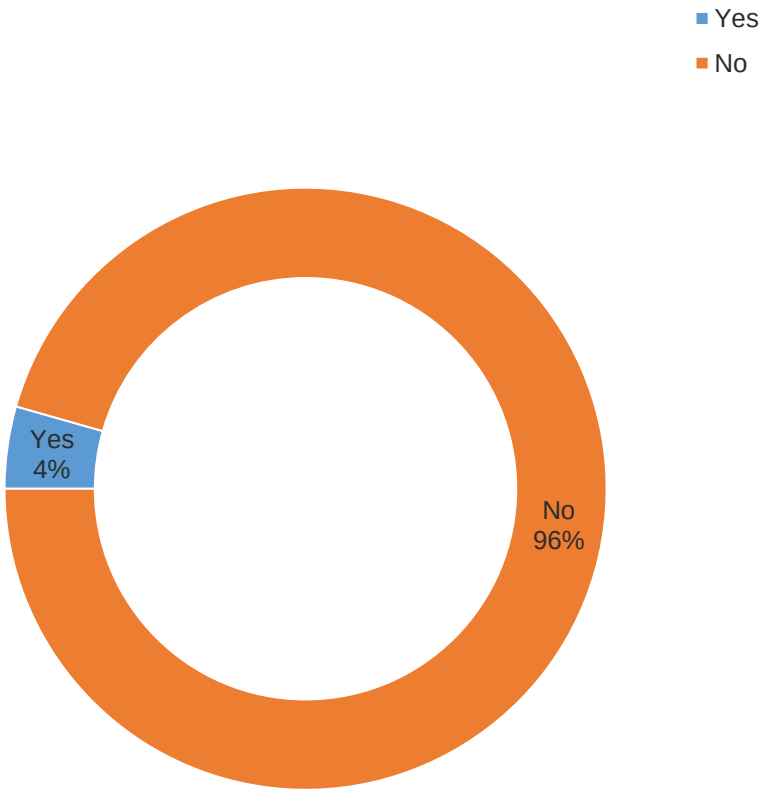


Base: 2022 - March 401 responses.

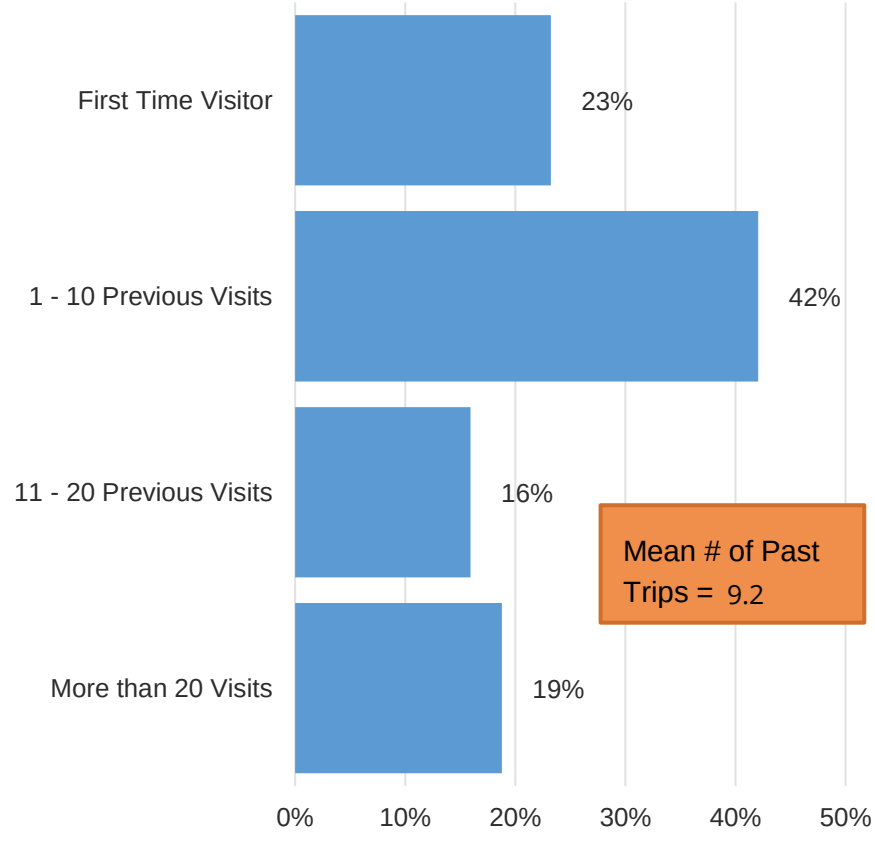
Destination Analysts

First-Time Visit to Florida / Previous Visitation to St. Pete/Clearwater

First Time Visitors to Florida



Previous Visitation to the St. Pete/Clearwater Area

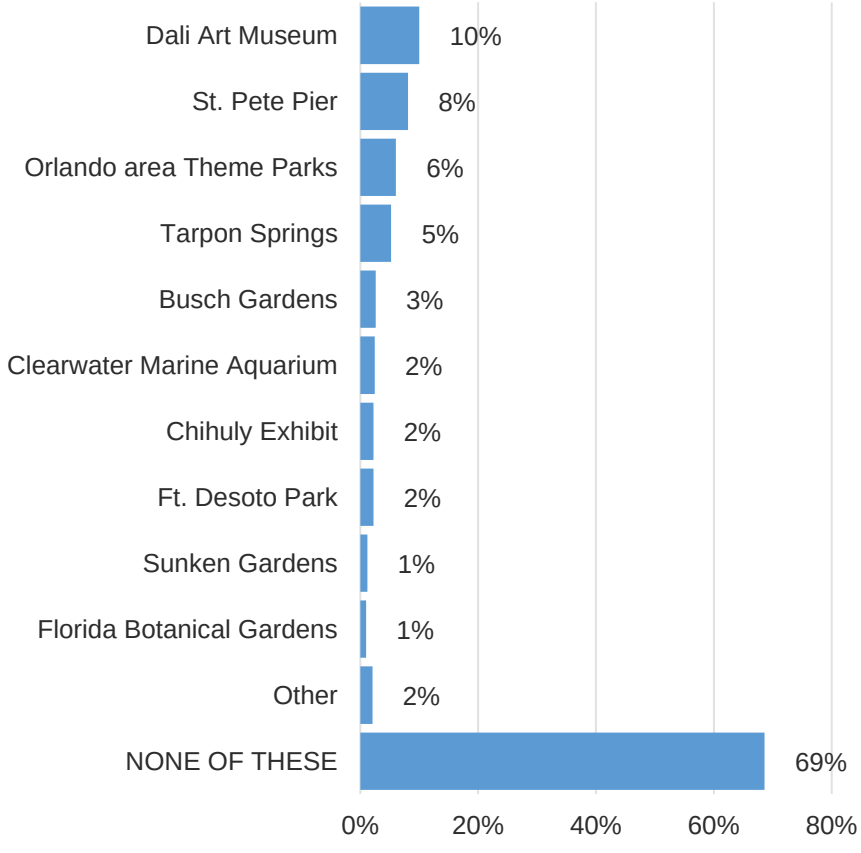


Base: 2022 - March 401 responses.

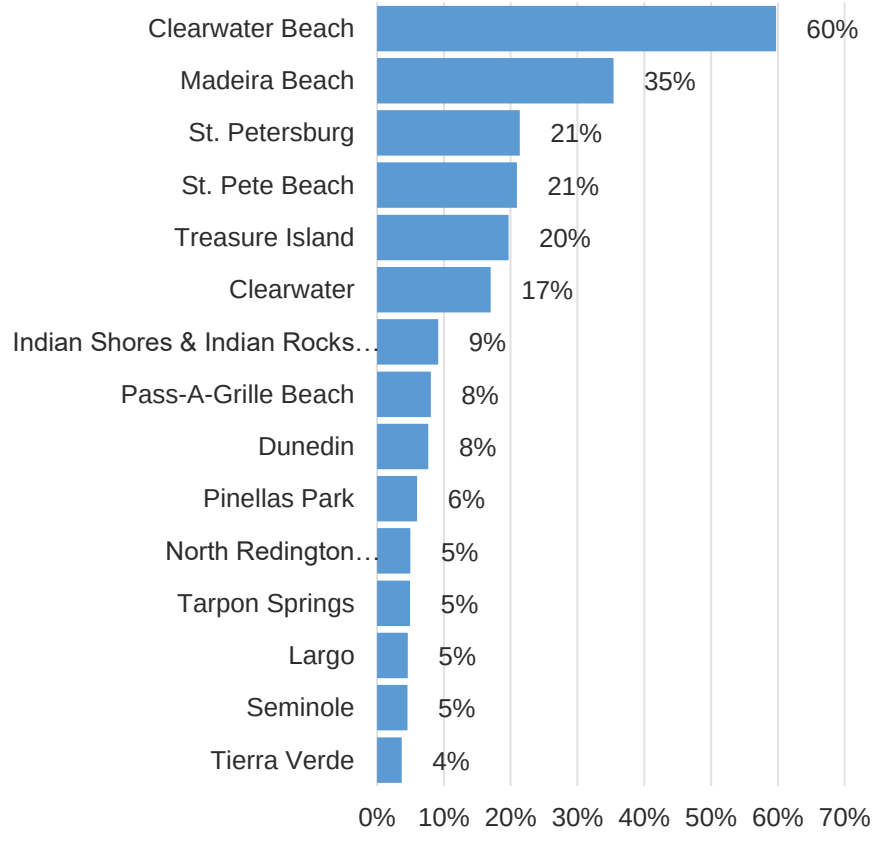
Destination Analysts

Attractions Visited / Communities Visited

Attractions Visited



Communities Visited

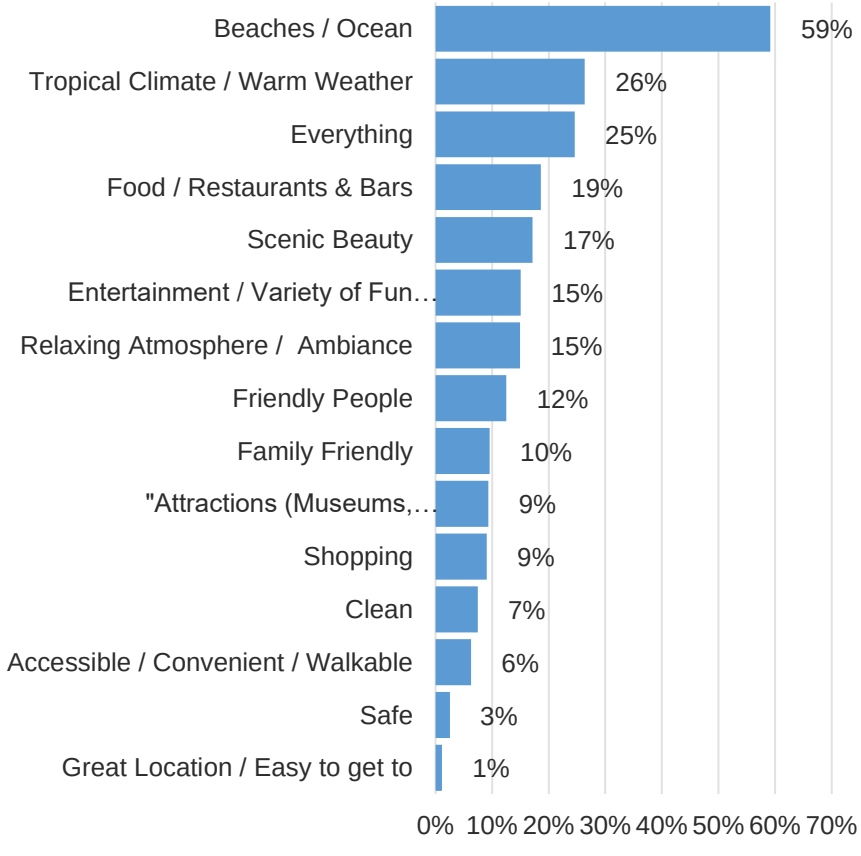


Base: 2022 - March 401 responses.

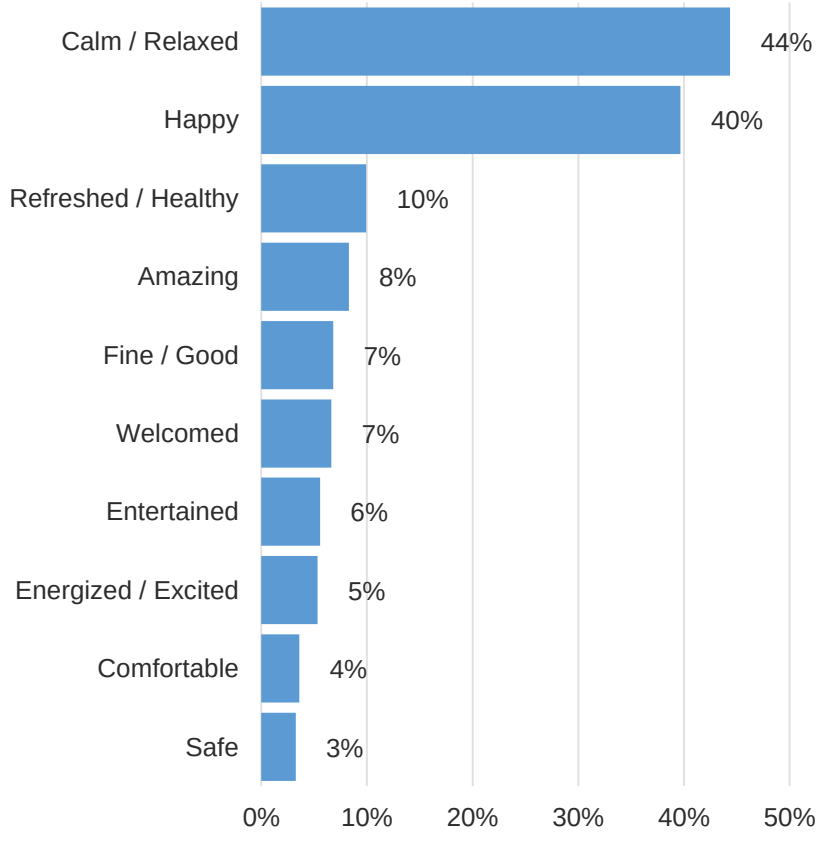
Destination Analysts

Most Liked Aspect / Feelings in St. Pete-Clearwater

Most Liked Aspects of SPC (Unaided)



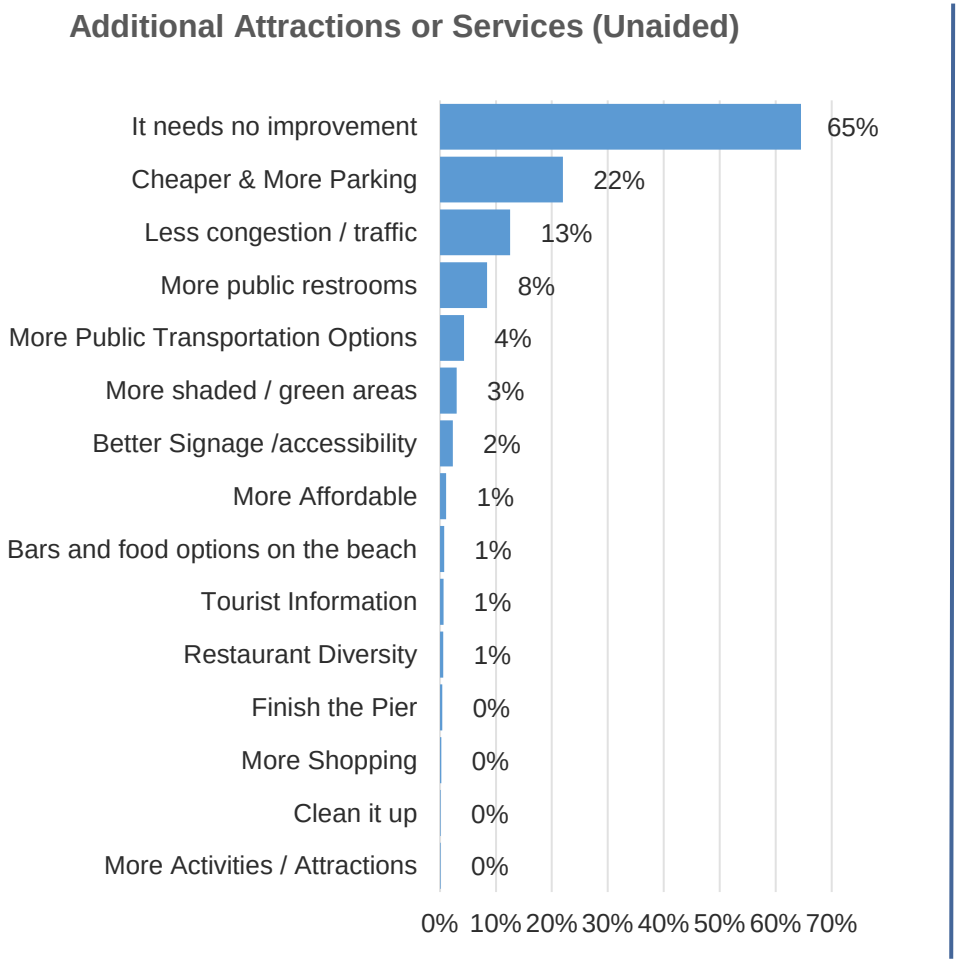
Feelings in SPC Area (Unaided)



Base: 2022 - March 401 responses.

Destination Analysts

Attractions or Services that Would Enhance the Destination Experience



Base: 2022 - March 401 responses.

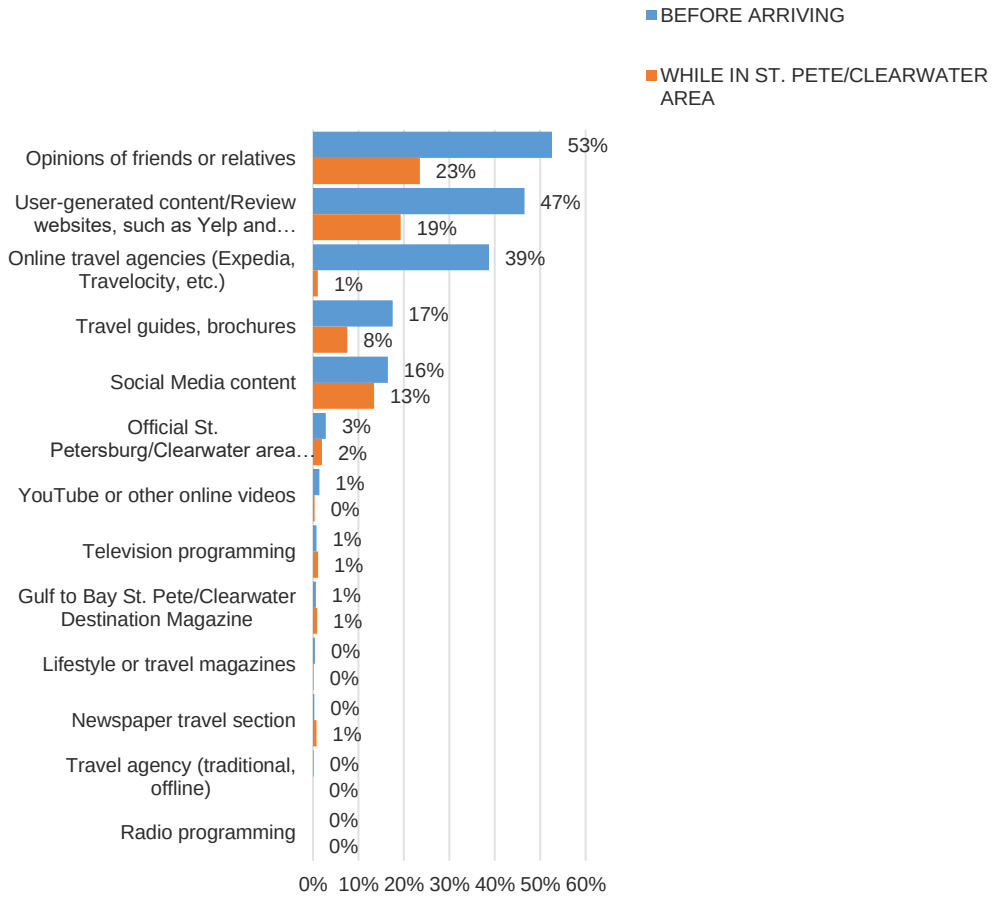
Destination Analysts

When Decision to Visit was Made / Travel Planning Resources Used

Average Time Between Decision to Visit and Arrival

50.0 Days in Advance

Resources Used before Arrival and While In Market

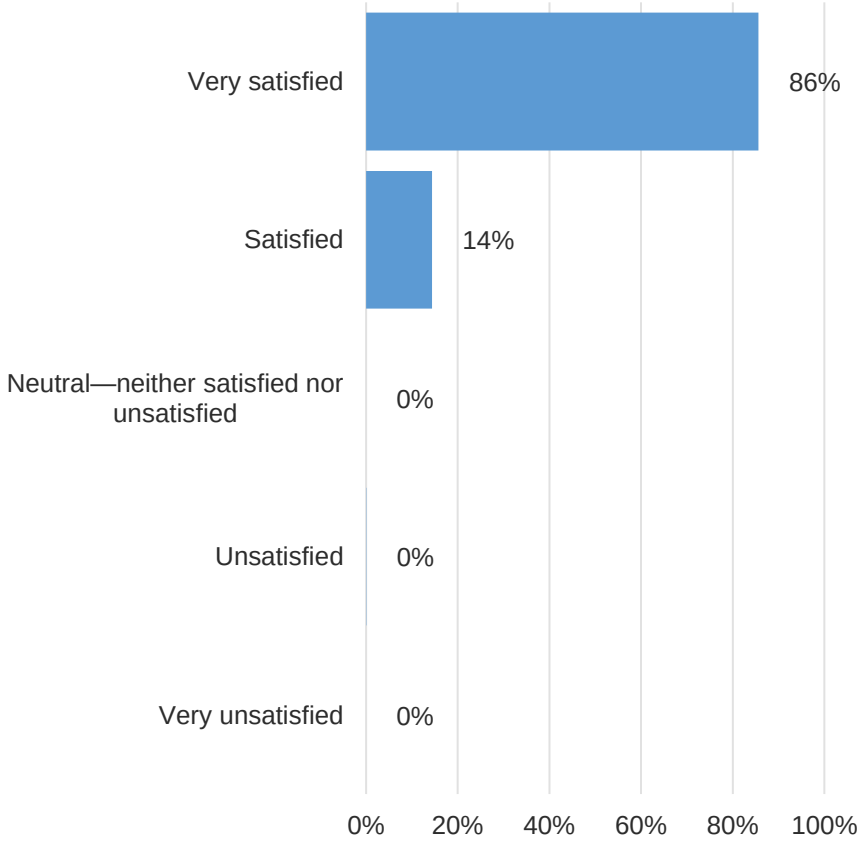


Base: 2022 - March 401 responses.

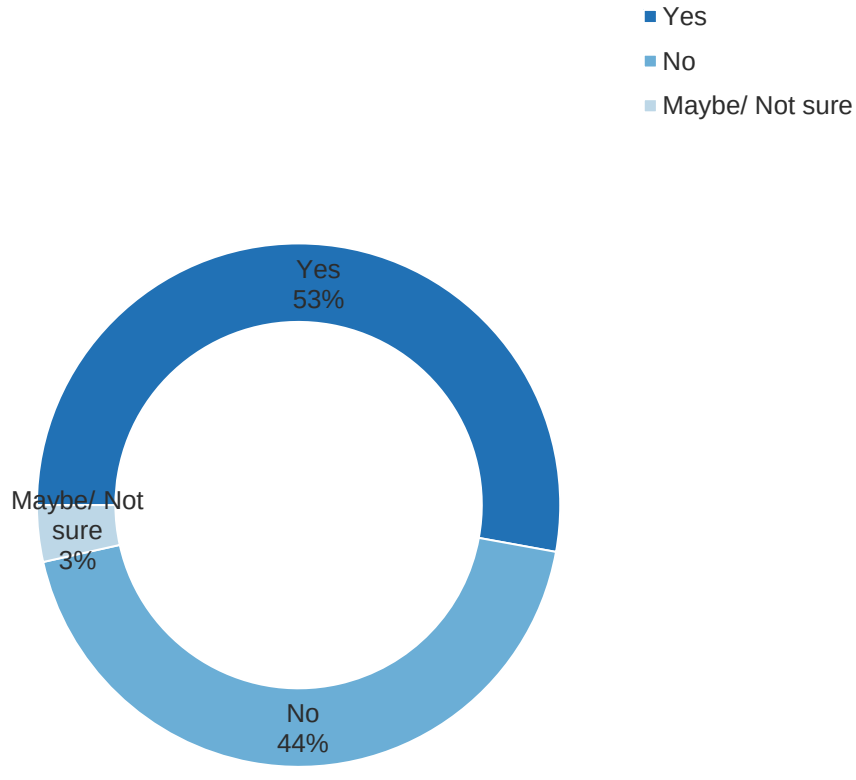
Destination Analysts

Experience Satisfaction / Earned & Paid Media Recall

Overall Satisfaction



Media Recall



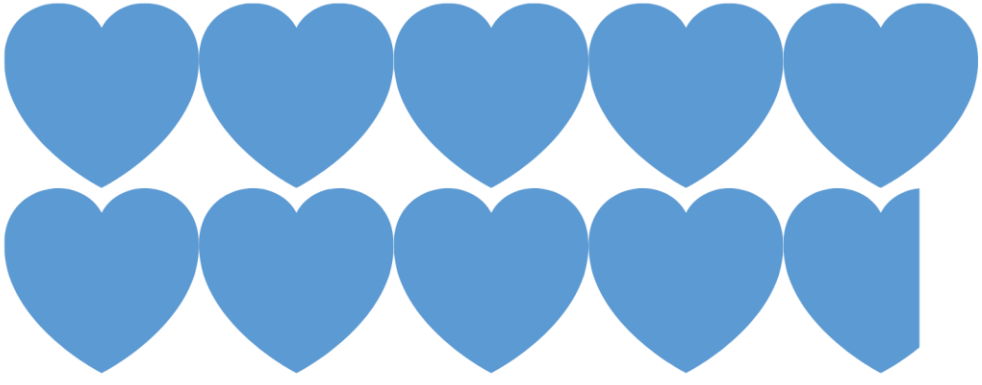
Base: 2022 - March 401 responses.

Destination Analysts

Likelihood to Recommend / Likelihood to Return

Likelihood to Recommend

9.7 / 10



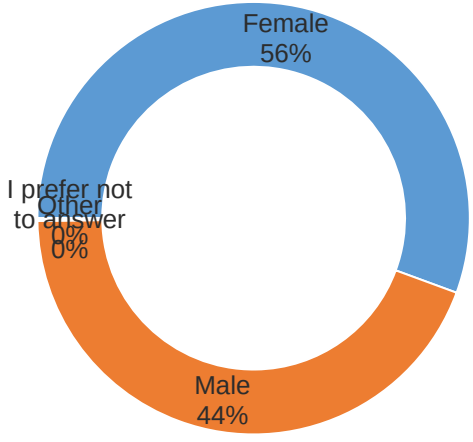
Likelihood to Return

9.6 / 10

Base: 2022 - March 401 responses.

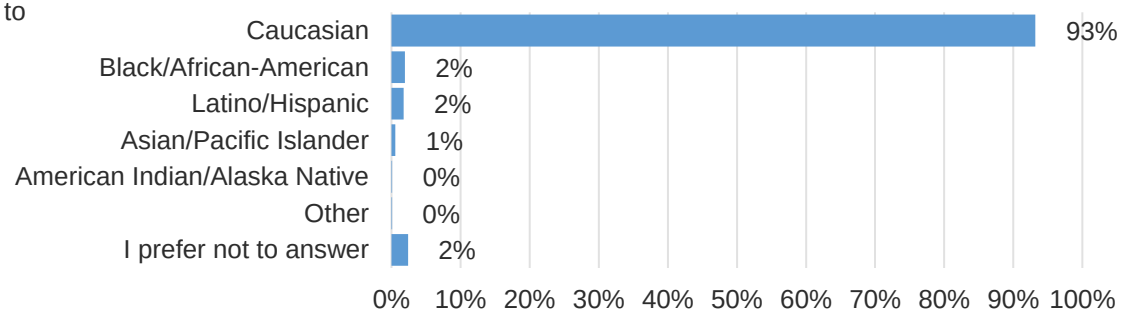
Destination Analysts

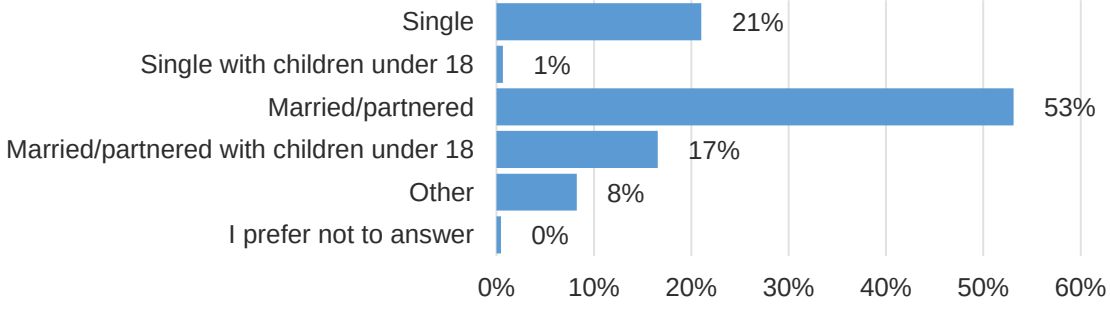
Demographics

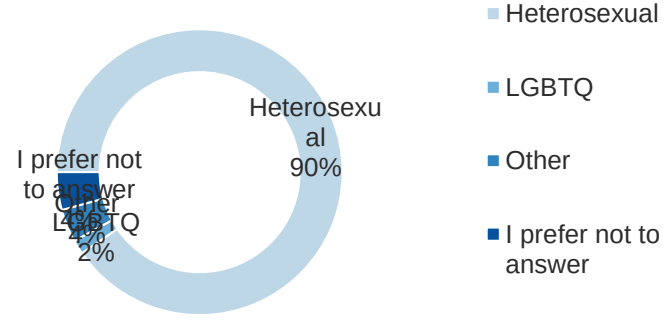


Average Age: 53.2

Average Income: $14







Base: 2022 - March 401 responses.

Destination Analysts

Visit St. Pete Clearwater
Visitor Profile Study
Infographic Profile: 2022 - March 401 responses.

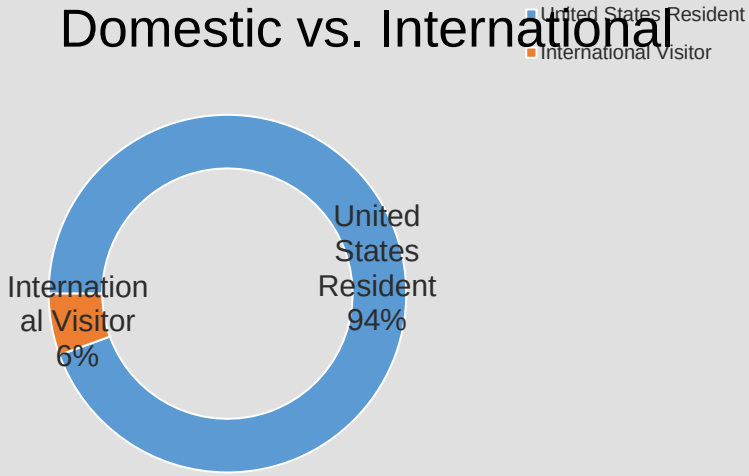
Infographic Profile: 2022 - March 401 responses.

5.8% Millennials

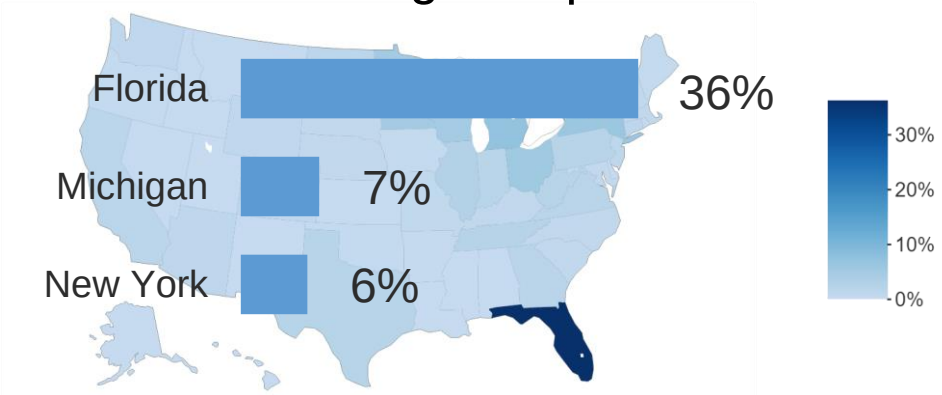
41.2% Gen X

26.4% Baby Boomers

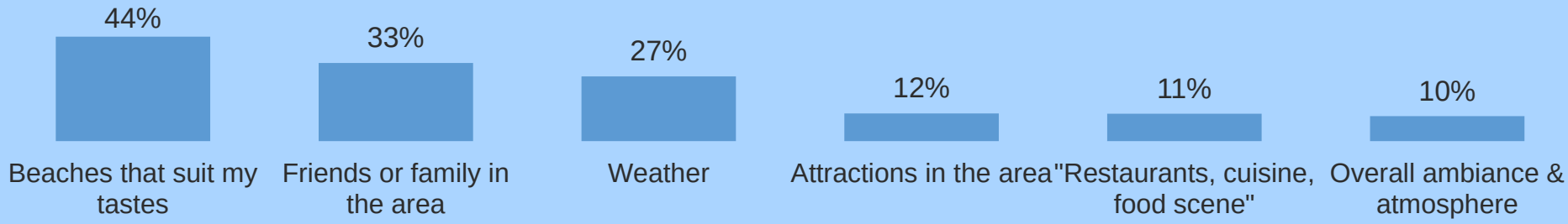
Domestic vs. International



Point of Origin: Top States



Factors Important to Destination Decision



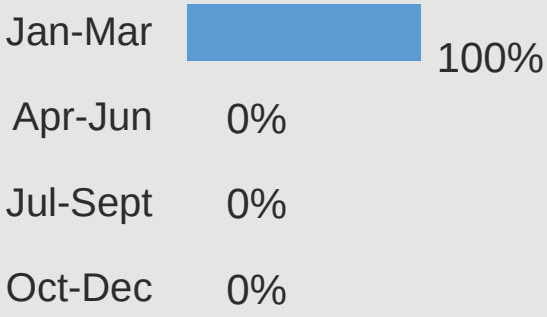
Destination Analysts

Infographic Profile: 2022 - March 401 responses.

Length of Stay

2.9 Days (on average)

Seasonality of Visit



Travel Party Size

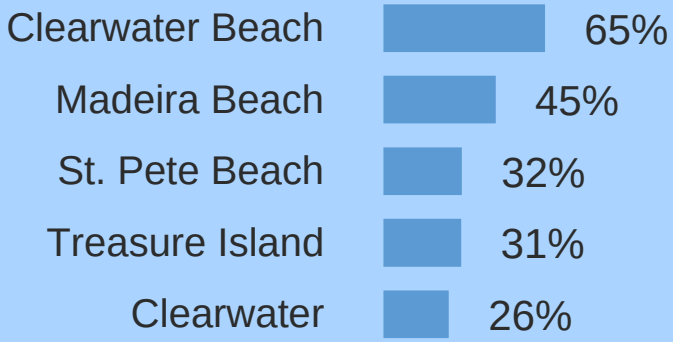
2.1 People

19.9% Traveled with Children

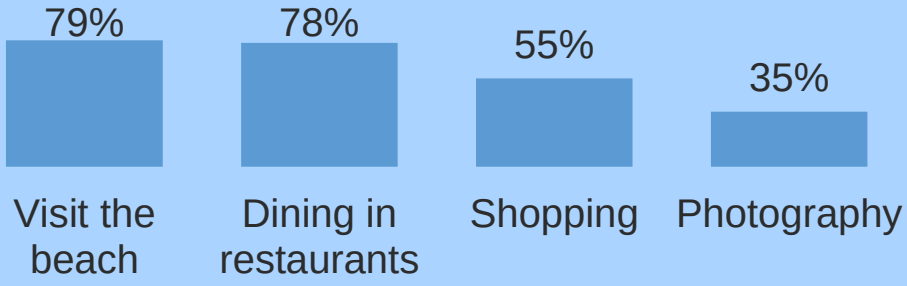
Daily Spending

$100.11 Per Person

Top Communities Visited



Top Activities



Destination Analysts