



Future Partners



ST.PETE
CLEARWATER

Visit St. Pete/Clearwater

VISITOR PROFILE STUDY

Report of Findings
2022 – 2023 Fiscal Year

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OVERVIEW & METHODOLOGY

This report represents the fiscal year findings of a comprehensive visitor profile development study conducted by Future Partners on behalf of Visit St. Pete/Clearwater. The data is collected 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 report presents the top-line survey data collected from visitors surveyed between October 2022 - September 2023.

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, 5,751 completed surveys from Pinellas County visitors were collected.



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

OVERVIEW & METHODOLOGY

Future Partners' 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: Future Partners 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: Future Partners' research staff surveying a visitor.

An aerial photograph of a coastal city, likely San Juan, Puerto Rico. The image shows a large, multi-story building complex in the center, surrounded by lush greenery and palm trees. A prominent bridge spans across a body of water in the background. The sky is clear and blue. The text "ECONOMIC IMPACT ANALYSIS" is overlaid in the center of the image.

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 in to the local economy that occurs when a visitor purchases any good/service inside Pinellas Co.
- **Total economic impact** – The total change in economic activity in Pinellas Co. 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 Co. generated by visitors.
- **Indirect effects** – Changes in inter-industry transactions when supplying industries respond to increased demands from the directly affected industries (i.e., 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).
- **Hotel guests** – Visitors who stayed overnight in a Pinellas Co. hotel, motel, resort or inn.
- **Visiting friends/relatives (VFRs)** – Visitors who stayed overnight in the private residence of a friend or family member who lives in Pinellas Co.
- **Vacation rental guests** – Visitors who stayed overnight in a condo, vacation home or other private home rental in Pinellas Co.
- **Day trip visitors (regional)** – Visitors who came for the day and reside in the regional area surrounding Pinellas Co.
- **Day trip visitors (travelers)** – Visitors who came for the day, stayed overnight outside Pinellas Co. and reside outside the region.
- **Peer-to-peer home share guests** – Pinellas Co. visitors who stayed overnight in a home share rental in Pinellas Co. booked through AirBnB, VRBO, or similar lodging.
- **Other** – Pinellas County visitors who stayed overnight in other types of lodging.

ECONOMIC IMPACT ESTIMATE

Visitors to Pinellas Co. - Pinellas Co. had almost 16 million visitors between October 2022 – September 2023. The largest segment of visitor volume were day trip visitors from outside the surrounding region, comprising 5.5 million visitors, or 35% of all visitors.

Direct Visitor Spending in Pinellas Co. - The tourism industry generated \$6.6 billion in direct visitor spending inside the county from October 2022 – September 2023. The largest share of this spending was generated by hotel guests who stayed overnight in commercial lodging. These visitors were responsible for \$3.3 billion in visitor spending, or 50% of the total.

Total Economic Impact of Tourism to Pinellas Co. – Tourism generated almost \$11 billion in economic impact for Pinellas Co. during October 2022 – September 2023. The total economic impact is comprised of direct visitor spending, as well as indirect and induced effects.

	Q4 2022 (Oct – Dec)	Q1 2023 (Jan – Mar)	Q2 2023 (Apr – Jun)	Q3 2023 (Jul – Sep 2023)	Fiscal Year 2022 – 2023
Visitors to Pinellas Co.	3,434,064	4,446,523	4,225,362	3,751,685	15,857,633
Direct Visitor Spending in Pinellas Co.	\$1,497,959,201	\$2,020,069,440	\$1,656,120,785	\$1,425,037,162	\$6,599,186,589
Total Economic Impact of Tourism to Pinellas Co.	\$2,495,167,641	\$3,318,830,071	\$2,782,000,040	\$2,340,821,574	\$10,936,819,326
Tax Revenues Generated for Pinellas Co.	\$93,546,346	\$131,990,815	\$109,694,932	\$88,790,118	\$424,022,210
Hotel Room Nights	1,606,362	1,850,307	1,704,274	1,505,245	6,666,187
Visitor Industry Payroll	\$786,437,547	\$1,047,151,186	\$883,044,582	\$744,509,598	\$3,461,142,913
Jobs Supported	24,130	31,883	26,964	22,837	105,814

ECONOMIC IMPACT ESTIMATE (CONTINUED)

Tax Revenues Generated for Pinellas Co. – The tourism industry generated \$424 million in tax revenues from October 2022 – September 2023. 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 – An estimated 6.7 million hotel room nights were generated by visitors between October 2022 – September 2023.

Visitor Industry Payroll and Jobs supported – The tourism industry had an estimated total combined payroll of \$3.4 billion between October 2022 – September 2023. This is estimated to have supported 105,814 jobs county-wide.

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Direct Visitor Spending in Pinellas Co.	\$1,497,959,201	\$2,020,069,440	\$1,656,120,785	\$1,425,037,162	\$6,599,186,589
Total Economic Impact of Tourism to Pinellas Co.	\$2,495,167,641	\$3,318,830,071	\$2,782,000,040	\$2,340,821,574	\$10,936,819,326
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Hotel Room Nights	1,606,362	1,850,307	1,704,274	1,505,245	6,666,187
Visitor Industry Payroll	\$786,437,547	\$1,047,151,186	\$883,044,582	\$744,509,598	\$3,461,142,913
Jobs Supported	24,130	31,883	26,964	22,837	105,814

ECONOMIC IMPACT ESTIMATES: YEAR OVER YEAR

The table below compares the most recent 2022-2023 fiscal year to past fiscal years.

Overall, visitor volume is up just under 1% compared to last fiscal year and spending is up 0.3%. Similarly total economic impact is up very slightly this fiscal year compared to last. Total taxes generated is up 2.5% and total room nights is up 1.4% while total payroll and jobs supported are down very slightly.

	Fiscal Year 2019 – 2020	Fiscal Year 2020 – 2021	Fiscal Year 2021 – 2022	Fiscal Year 2022 – 2023	% Change From Last Year
Visitors to Pinellas Co.	12,472,080	14,501,644	15,714,731	15,857,633	0.9%
Direct Visitor Spending in Pinellas Co.	\$4,061,465,056	\$5,013,680,057	\$6,581,648,116	\$6,599,186,589	0.3%
Total Economic Impact of Tourism to Pinellas Co.	\$6,618,296,876	\$8,160,456,573	\$10,837,656,523	\$10,936,819,326	0.9%
Tax Revenues Generated for Pinellas Co.	\$245,975,857	\$316,769,954	\$413,529,340	\$424,022,210	2.5%
Hotel Room Nights	4,855,433	5,611,094	6,575,705	6,666,187	1.4%
Visitor Industry Payroll	\$2,104,557,760	\$2,609,769,009	\$3,473,234,958	\$3,461,142,913	-0.3%
Jobs Supported	66,218	81,686	107,135	105,814	-1.2%

ECONOMIC IMPACT ESTIMATES: DETAILED



TOTAL VISITORS
15,857,633

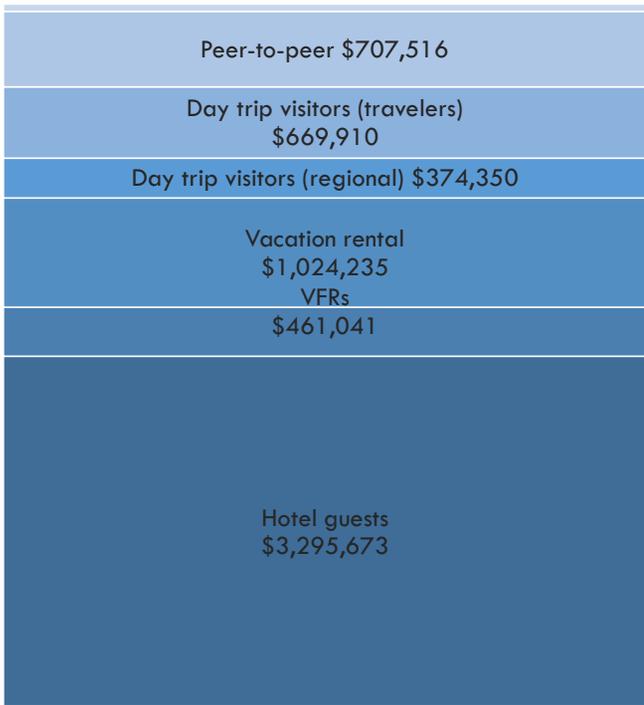
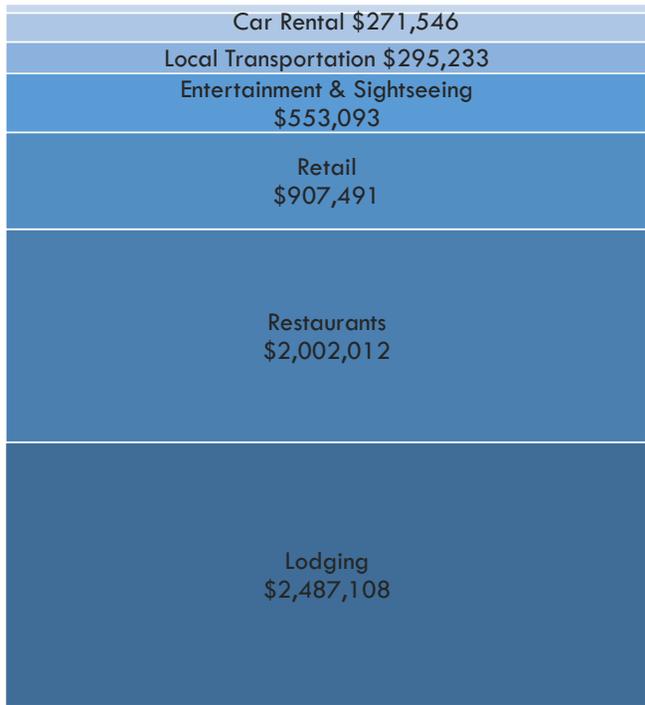


ECONOMIC IMPACT
\$10,936,819,326

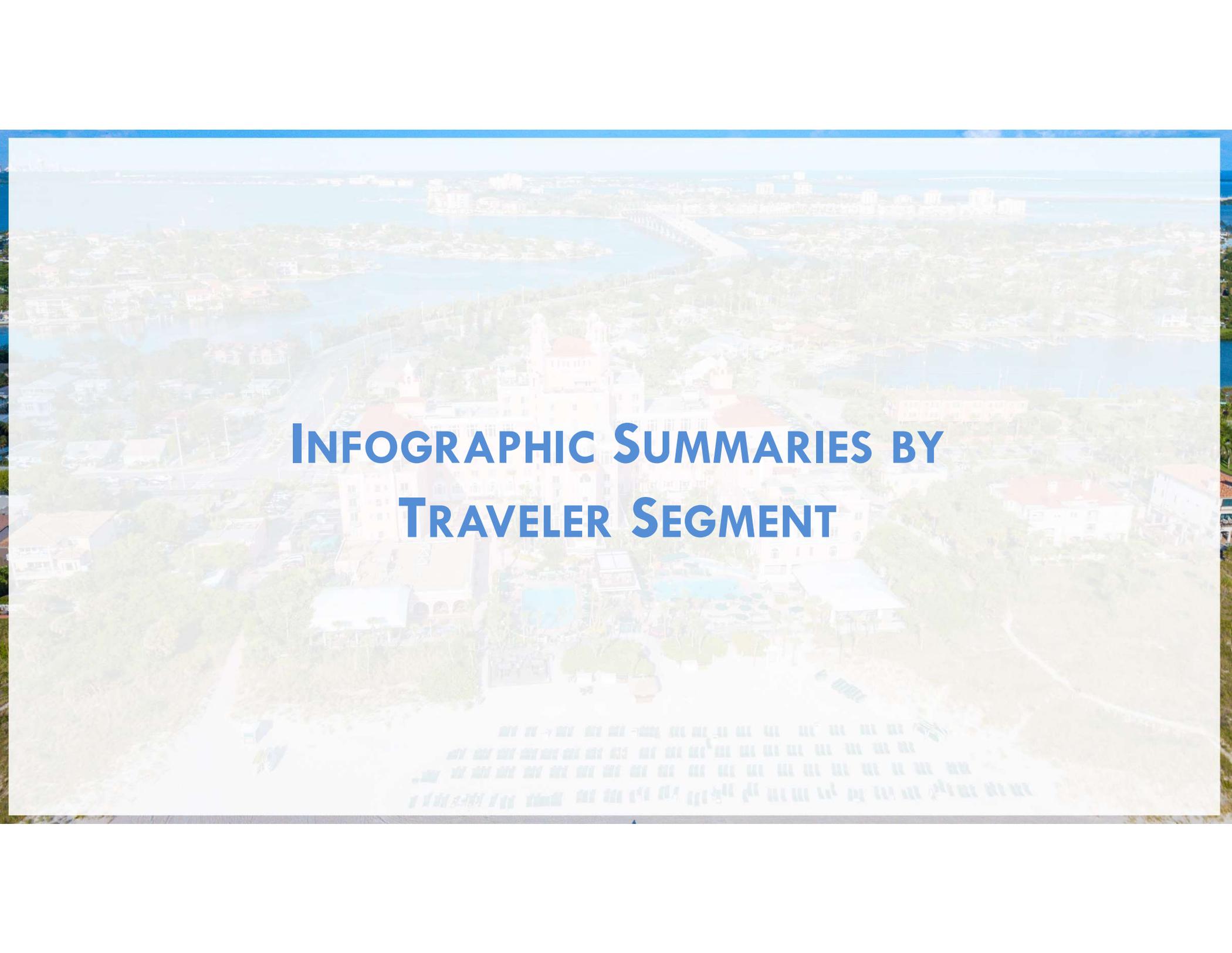


TAXES GENERATED
\$424,022,210

ECONOMIC IMPACT ESTIMATES: DETAILED SPENDING



TOTAL DIRECT VISITOR SPENDING (in thousands)
\$6,599,187

An aerial photograph of a large resort complex, likely the Grand Wailea in Maui, Hawaii. The central focus is a grand, multi-story building with a red-tiled roof and two prominent towers. In front of the main building are several swimming pools and lush greenery. A long, white bridge extends across a body of water in the background, connecting the resort to the mainland. The surrounding area is filled with palm trees and other tropical vegetation. The entire image is overlaid with a semi-transparent white rectangle containing the title text.

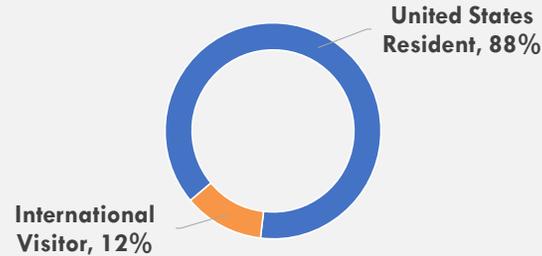
INFOGRAPHIC SUMMARIES BY TRAVELER SEGMENT



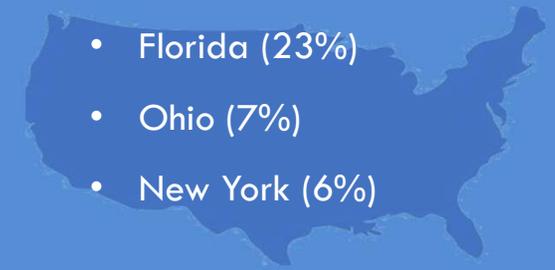
THE BEACH GO-ER

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.

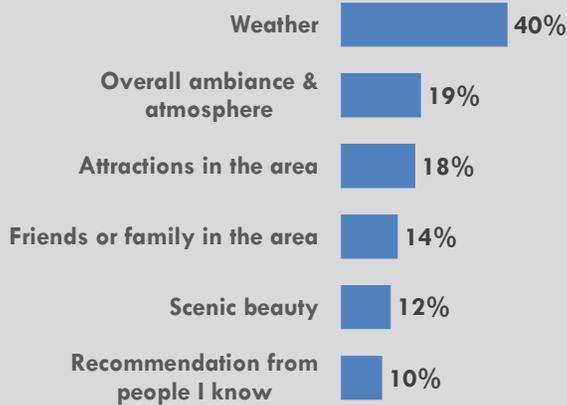
Domestic vs. International



Point of Origin: Top States



Factors Important to Destination Decision



Length of Stay



5.4 days (on average)

Travel Party Size



2.6 People

18% Traveled with Children

Daily Spending

\$156 Per Person

Top Communities Visited

1. Clearwater Beach 49%
2. Madeira Beach 39%
3. St. Petersburg 38%
4. St. Pete Beach 25%
5. Treasure Island 16%

Top Activities



85%

Dining in restaurants



56%

Shopping



50%

Swimming



23%

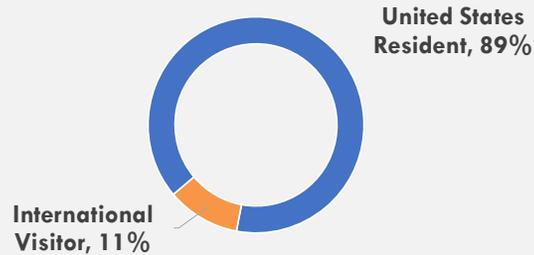
Visit museums



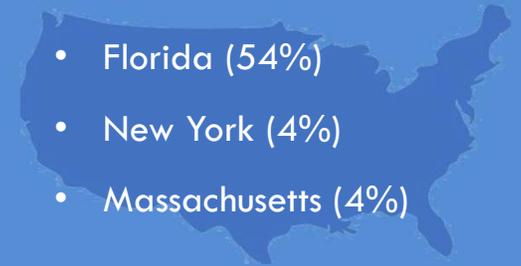
THE ARTS & CULTURE VISITOR

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.

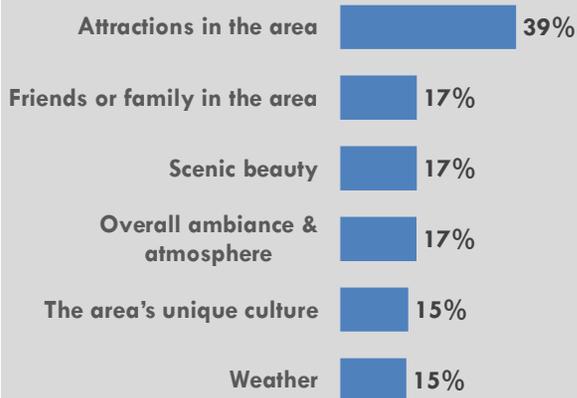
Domestic vs. International



Point of Origin: Top States



Factors Important to Destination Decision



Length of Stay



2.4 Days (on average)

Travel Party Size



2.3 People

7% Traveled with Children

Daily Spending



Top Communities Visited

1. St. Petersburg 92%
2. St. Pete Beach 13%
3. Clearwater Beach 7%
4. Madeira Beach 6%
5. Treasure Island 5%

Top Activities

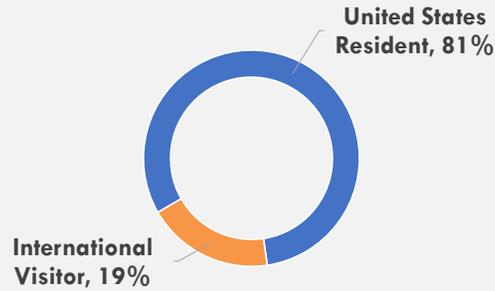




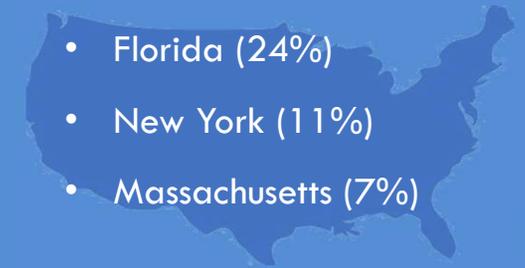
THE AFFLUENT VISITOR

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

Domestic vs. International



Point of Origin: Top States



Length of Stay



5.3 Days (on average)

Travel Party Size



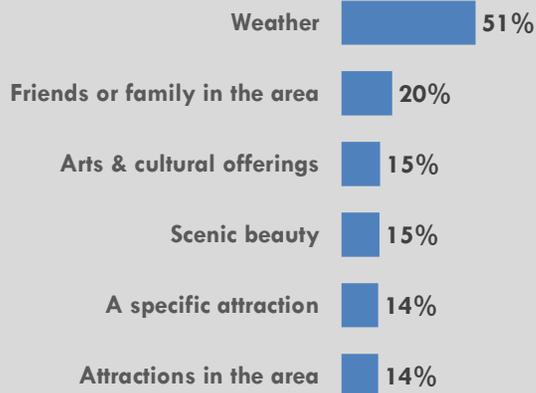
2.5 People

23% Traveled with Children

Daily Spending



Factors Important to Destination Decision



Top Communities Visited

1. St. Petersburg 45%
2. Madeira Beach 29%
3. Clearwater 29%
4. Treasure Island 25%
5. St. Pete Beach 25%

Top Activities



62%

Visit the beach



33%

Dining in restaurants



30%

Visit museums



28%

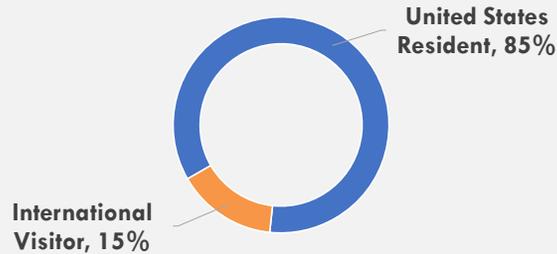
Shopping



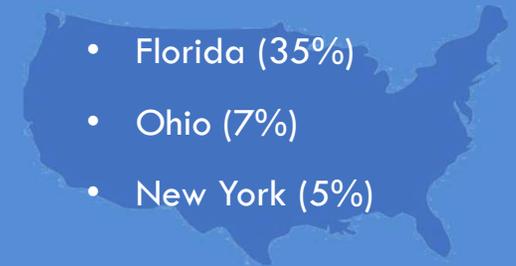
THE FAMILY TRAVELER

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

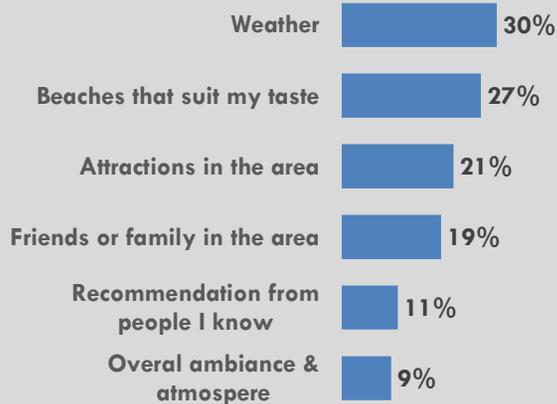
Domestic vs. International



Point of Origin: Top States



Factors Important to Destination Decision



Length of Stay



4.3 Days (on average)

Travel Party Size



3.9 People

100% Traveled with Children

Daily Spending



Top Communities Visited

1. St. Petersburg 51%
2. Clearwater Beach 31%
3. Madeira Beach 25%
4. St. Pete Beach 16%
5. Clearwater 15%

Top Activities



58%

Visit the beach



57%

Dining in restaurants



39%

Shopping



31%

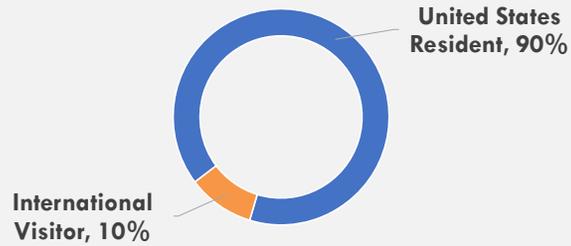
Swimming

An aerial photograph of a large resort complex, likely a university campus or a major hotel. The central focus is a large, multi-story building with a prominent tower and red-tiled roof. Surrounding this central building are several swimming pools, tennis courts, and other recreational facilities. In the background, a long bridge spans across a wide body of water, connecting the resort to a distant city skyline. The overall scene is lush with greenery and palm trees, suggesting a tropical or coastal location.

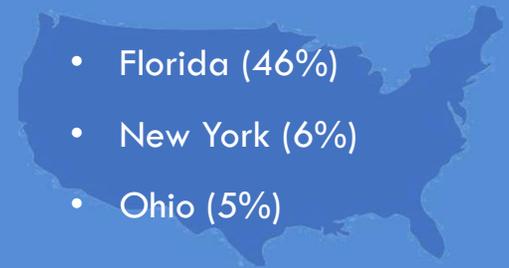
INFOGRAPHIC SUMMARIES BY GENERATION

THE MILLENNIAL VISITOR

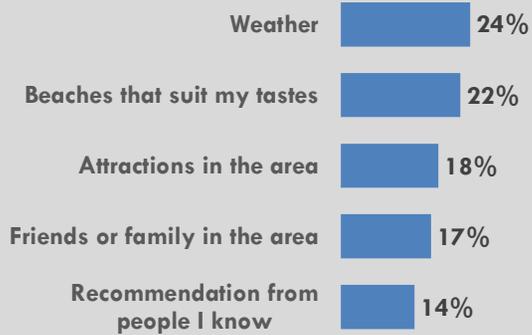
Domestic vs. International



Point of Origin: Top States



Factors Important to Destination Decision



Length of Stay



3.4 Days (on average)

Travel Party Size



2.4 People

16% Traveled with Children

Daily Spending

\$144
Per Person

Top Communities Visited

1. St. Petersburg 56%
2. Clearwater Beach 26%
3. Madeira Beach 23%
4. St. Pete Beach 16%
5. Treasure Island 13%

Top Activities



64%

Dining in restaurants



56%

Visit the beach



42%

Shopping

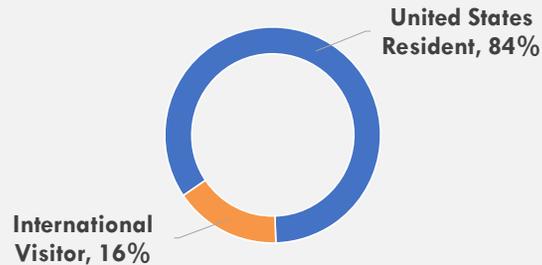


30%

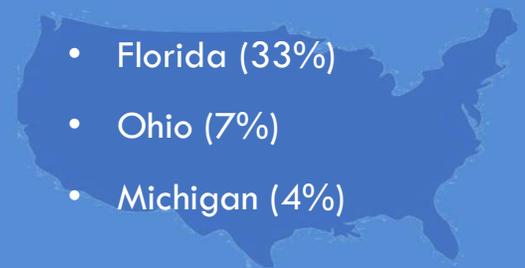
Swimming

THE GEN X VISITOR

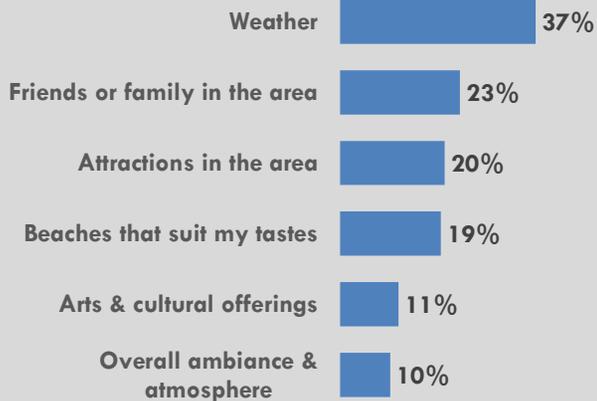
Domestic vs. International



Point of Origin: Top States



Factors Important to Destination Decision



Length of Stay



4.4 Days (on average)

Travel Party Size



2.5 People

24% Traveled with Children

Daily Spending

\$159
Per Person

Top Communities Visited

1. St. Petersburg 53%
2. Clearwater Beach 26%
3. Madeira Beach 25%
4. Treasure Island 18%
5. St. Pete Beach 17%

Top Activities



58%

Visit the beach



54%

Dining in restaurants



38%

Shopping

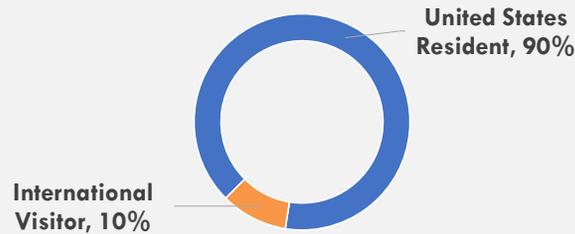


32%

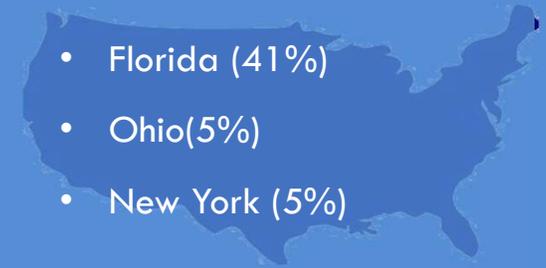
Visit museums

THE BABY BOOMER VISITOR

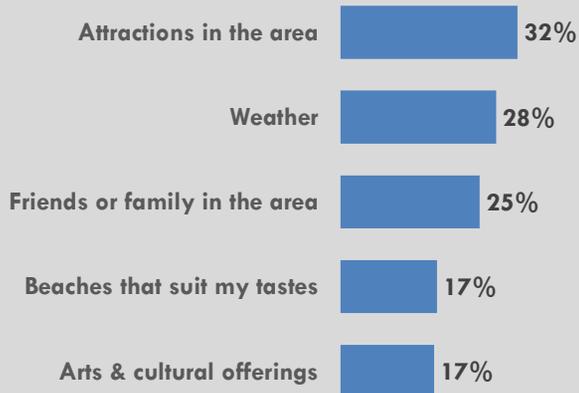
Domestic vs. International



Point of Origin: Top States



Factors Important to Destination Decision



Length of Stay



3.8 Days (on average)

Travel Party Size



2.3 People

4% Traveled with Children

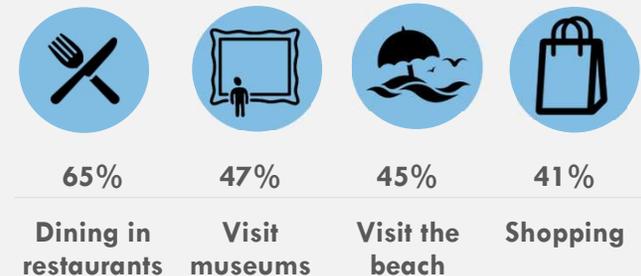
Daily Spending

\$128
Per Person

Top Communities Visited

1. St. Petersburg 66%
2. Madeira Beach 25%
3. Clearwater Beach 18%
4. St. Pete Beach 16%
5. Treasure Island 11%

Top Activities



An aerial photograph of St. Pete/Clearwater, Florida, showing a large, multi-story building complex in the foreground, likely a hotel or resort. The building has a central tower and several wings. In the background, a long bridge spans across a large body of water, connecting the city to the mainland. The water is a deep blue, and the sky is clear. The overall scene is a vibrant coastal cityscape.

PLANNING THE ST. PETE/CLEARWATER TRIP

When Decision to Visit was Made

On average, visitors made the decision to visit approximately 57 days (~8 weeks) in advance, which is up from just over 50 days (~7 weeks) last year. Hotel Guests and VFRs made the decision to visit further in advance, with Hotel Guests averaging ~11 weeks (79 days) and VFRs averaging ~10 weeks (72 days) in advance. Meanwhile, Day Trippers made the decision to visit ~6 weeks in advance (41 days).

Figure 1: Average Time Between Decision to Visit and Arrival

**57.1 Days
in Advance**



Question: Approximately how many days, weeks or months before you arrived did you make the decision to visit the St. Pete/Clearwater area for this trip? Base: All Respondents. 5,746 responses.

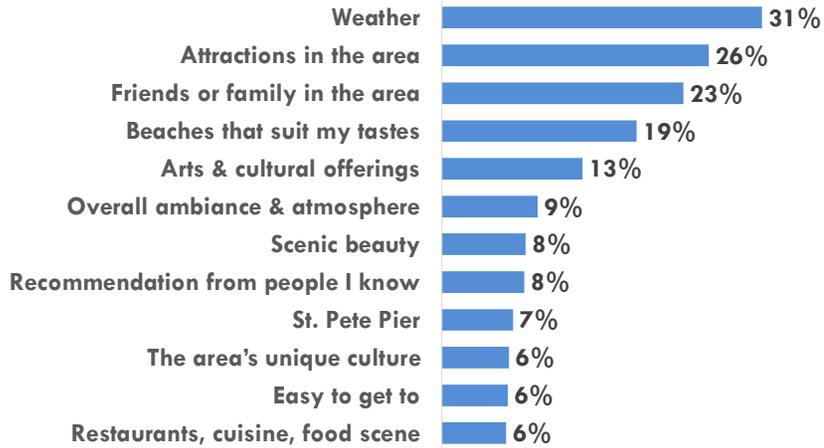
Detail by Type of Visitor

	Hotel	VFR	Day Trip
Average Days	78.9	71.6	40.7
Sample Size	1,325	954	2,177

Top Factors in Destination Decision

The most important factors driving visitation to the St. Pete/Clearwater area were weather (31%), attractions (26%), friends or family (23%), and/or beaches (19%). The importance of scenic beauty (8%) fell significantly from last year (49%), when it was the most important factor.

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. 5,580 responses.

Detail by Type of Visitor

	Hotel	VFR	Day Trip
Weather	39%	37%	23%
Attractions in the area	20%	15%	30%
Friends or family in the area	14%	77%	22%
Beaches that suit my tastes	40%	13%	8%
Arts & cultural offerings	9%	11%	16%
Overall ambiance & atmosphere	12%	11%	6%
Scenic beauty	9%	12%	6%
Recommendation from people I know	12%	5%	6%
St. Pete Pier	4%	3%	9%
The area's unique culture	4%	6%	7%
Easy to get to	7%	4%	5%
Restaurants, cuisine, food scene	6%	8%	6%
Sample Size	1,239	942	2,123

All Factors in Destination Decision

	Total	Hotel	VFR	Day Trip
Weather	31%	39%	37%	23%
Attractions in the area	26%	20%	15%	30%
Friends or family in the area	23%	14%	77%	22%
Beaches that suit my tastes	19%	40%	13%	8%
Arts & cultural offerings	13%	9%	11%	16%
Overall ambiance & atmosphere	9%	12%	11%	6%
Scenic beauty	8%	9%	12%	6%
Recommendation from people I know	8%	12%	5%	6%
St. Pete Pier	7%	4%	3%	9%
The area's unique culture	6%	4%	6%	7%
Easy to get to	6%	7%	4%	5%
Restaurants, cuisine, food scene	6%	6%	8%	6%
A specific attraction	5%	5%	2%	6%
Shopping opportunities	5%	3%	2%	6%
Special event(s) and/or festival(s)	4%	4%	2%	4%
Outdoor recreational opportunities	2%	3%	2%	2%
Advertisements for the area	2%	2%	1%	3%
Fishing opportunities	2%	1%	2%	3%
Articles, features, reviews, etc. about the area	2%	4%	1%	1%
Good deal on airfare	2%	3%	1%	1%
The St. Pete/Clearwater area is family-friendly	1%	2%	1%	1%
Sports or sporting events	1%	3%	1%	1%
Lifelong desire to visit	1%	2%	1%	1%
Golf	1%	1%	0%	1%
Appealing hotels/resorts and other lodging options	1%	3%	0%	0%
Good hotel rate	1%	2%	0%	0%
The St. Pete/Clearwater area is romantic	1%	1%	1%	0%
Breweries/Distilleries/Craft beer scene	0%	0%	0%	0%
Sample Size	5,580	1,239	942	2,123

Question: Which of the following were IMPORTANT to your decision to take this trip to St. Pete/Clearwater area? (Select all that apply)

Base: All Respondents. 5,580 responses.

Travel Planning Resources Used

Opinions of friends/relatives, user-generated content/review websites (36%), OTAs (22%), and social media (18%) were the most relied upon travel planning resources prior to arrival. In general, travel planning resources are used less frequently once travelers are in market.

Figure 3: Travel Planning Resources Used

	Used Pre-Arrival	Used In Market
Opinions of friends or relatives	44%	20%
User-generated content/Review websites	36%	40%
Online travel agencies	22%	1%
Social Media content	18%	11%
VisitStPeteClearwater.com	5%	3%
YouTube or other online videos	3%	0%
Newspaper travel section	2%	1%
Travel agency (traditional, offline)	2%	1%
Travel guides, brochures	1%	9%
Television programming	1%	1%
Lifestyle or travel magazines	1%	0%
Radio programming	0%	0%
Gulf to Bay Magazine	0%	0%

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. 5,746 responses.

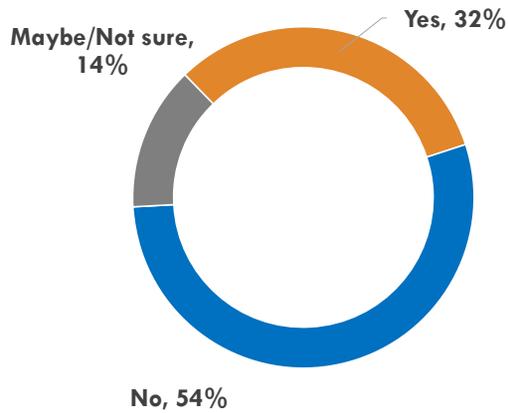
Detail by Type of Visitor

	Hotel		VFR		Day Trip	
	Pre-Arrival	In Market	Pre-Arrival	In Market	Pre-Arrival	In Market
Opinions of friends or relatives	31%	14%	70%	54%	49%	19%
User-generated content/Review websites	51%	57%	24%	31%	28%	31%
Online travel agencies	33%	2%	14%	1%	17%	1%
Social Media content	19%	12%	13%	11%	17%	10%
VisitStPeteClearwater.com	5%	5%	8%	2%	4%	1%
YouTube or other online videos	6%	1%	1%	1%	2%	0%
Newspaper travel section	1%	1%	1%	1%	2%	1%
Travel agency (traditional, offline)	2%	1%	0%	0%	1%	1%
Travel guides, brochures	2%	16%	2%	6%	1%	5%
Television programming	1%	1%	0%	1%	1%	0%
Lifestyle or travel magazines	1%	0%	0%	1%	1%	0%
Radio programming	0%	0%	0%	0%	1%	0%
Gulf to Bay Magazine	0%	1%	0%	0%	0%	0%
Sample Size	1,325		954		2,177	

Earned/Paid Media Recall

Nearly one-third of St. Pete/Clearwater area visitors (32%) recalled seeing, hearing, or reading advertisements/promotions for the destination in the past six months, which is similar to last year. Day trippers (36%) were the most likely segment to recall any kind of media for the St. Pete/Clearwater area.

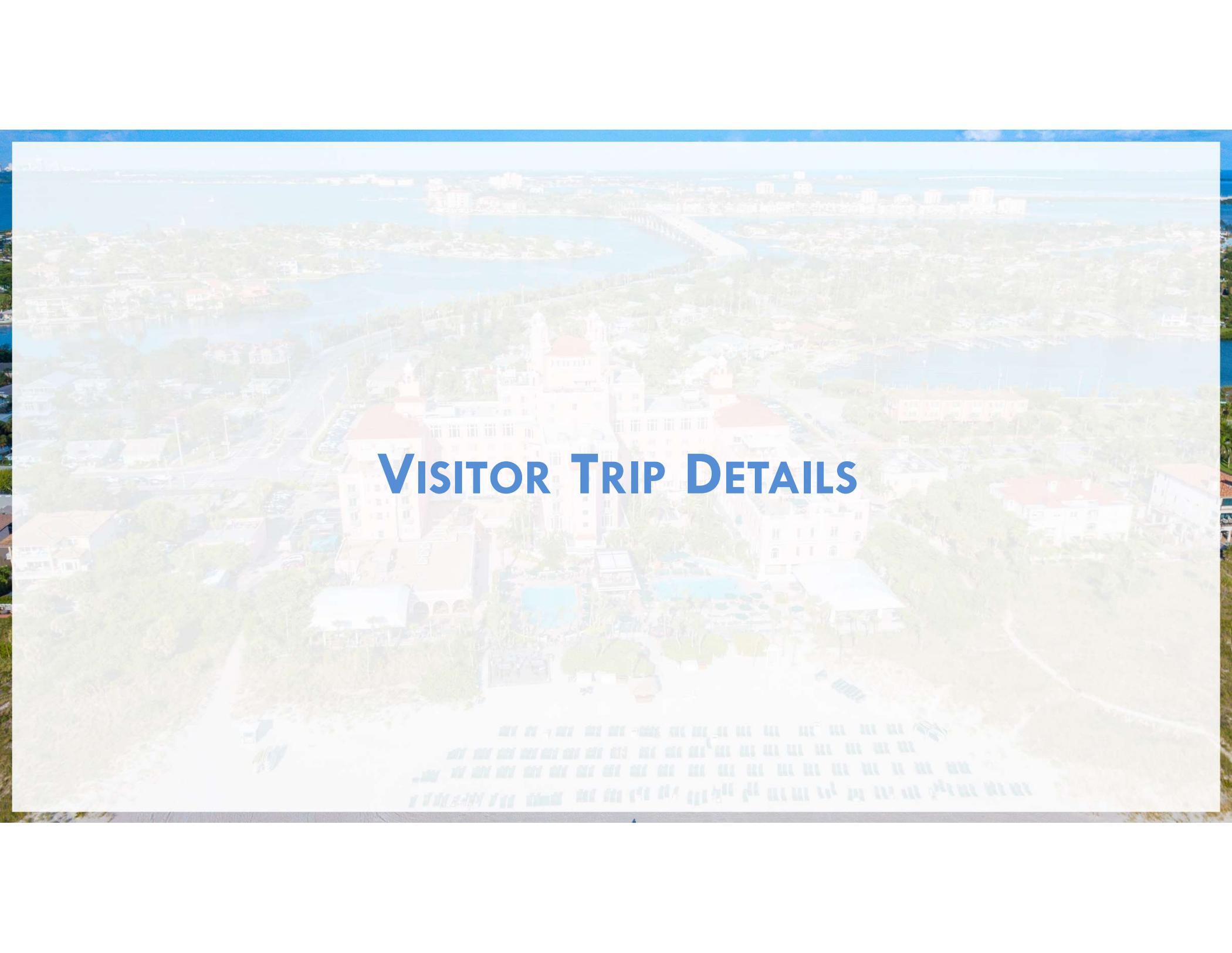
Figure 4: Media Recall



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 5,686 responses.

Detail by Type of Visitor

	Hotel	VFR	Day Trip
Yes	28%	20%	36%
No	61%	69%	50%
Maybe/Not sure	11%	11%	15%
Sample Size:	1,313	949	2,148

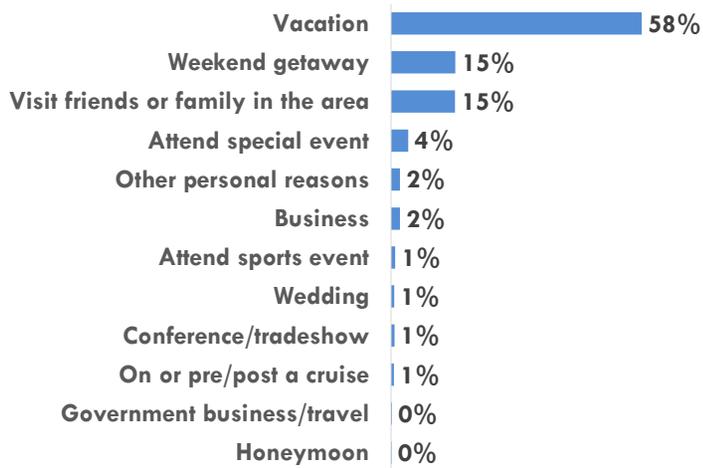
An aerial photograph of a large resort complex, likely the Grand Wailea in Maui, Hawaii. The central focus is a grand, multi-story building with a red-tiled roof and several towers. In front of the main building are two large swimming pools with blue water and surrounding lounge areas. The resort is situated on a hillside overlooking a bay. A long, white bridge spans across the water in the background, connecting the resort area to the mainland. The surrounding area is lush with greenery and palm trees. The sky is clear and blue.

VISITOR TRIP DETAILS

Primary Reason for Visit

Over half of St. Pete/Clearwater visitors (58%) described their trip as a vacation, which is up from last year (49%). Hotel Guests were most likely to say that they came to St. Pete/Clearwater for vacation (67%), while VFRs were the most likely to visit due friends/family (49%).

Figure 5: Primary Reason for Visit



Question: What is your primary reason for visiting the St. Pete/Clearwater Area? (Select one)
 Base: All Respondents. 5,708 responses.

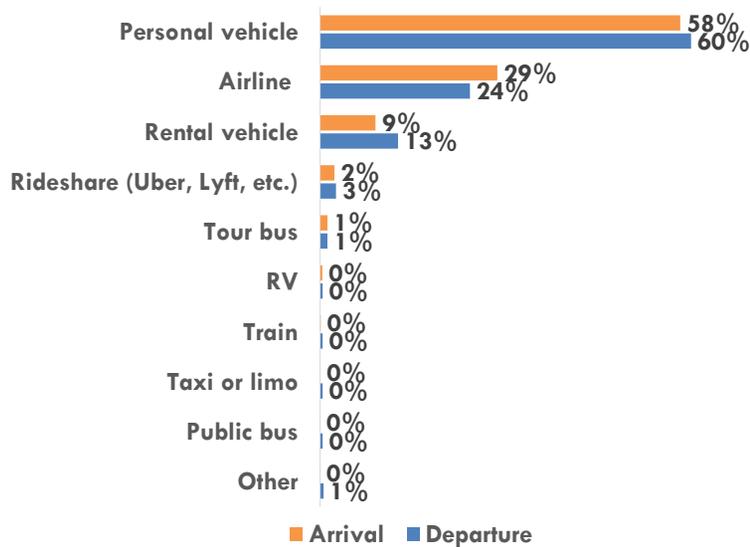
Detail by Type of Visitor

	Hotel	VFR	Day Trip
Vacation	67%	41%	53%
Weekend getaway	12%	5%	19%
Visit friends or family in the area	6%	49%	16%
Attend special event	2%	1%	5%
Other personal reasons	1%	2%	3%
Business	4%	1%	2%
Attend sports event	2%	0%	1%
Wedding	2%	1%	0%
Conference/tradeshow	2%	0%	0%
On or pre/post a cruise	1%	0%	1%
Government business/travel	0%	0%	0%
Honeymoon	0%	0%	0%
Sample Size	1,323	952	2,147

Method of Arrival & Departure

Personal vehicle (58%), airline (29%), and rental vehicle (9%) were the top methods of arrival in to St. Pete/Clearwater, which is unchanged from last year. Hotel Guests (45% v. 37%) and VFRs (50% v. 44%) were more likely to arrive via airline than by person vehicle.

Figure 6: Method of Arrival and Departure



Question: How did you arrive to the St. Pete/Clearwater area and how will you leave? (Select all that apply) Base: All Respondents. 5,751 responses.

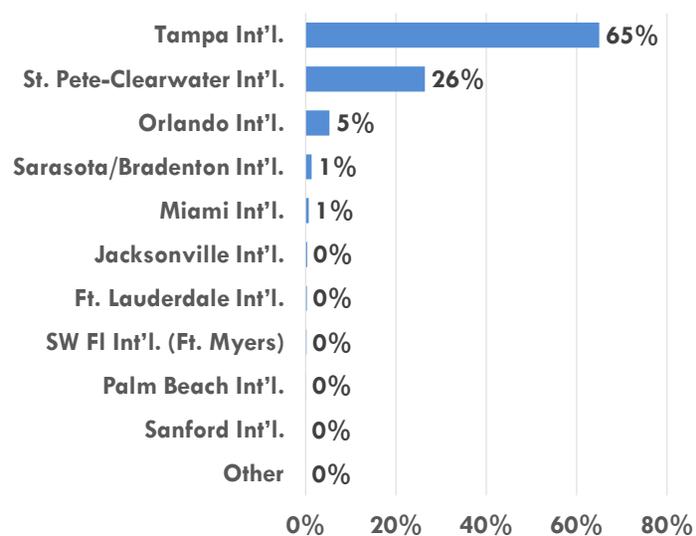
Detail by Type of Visitor

	Hotel		VFR		Day Trip	
	Arrival	Departure	Arrival	Departure	Arrival	Departure
Personal vehicle	37%	38%	44%	51%	69%	70%
Airline	45%	38%	50%	43%	18%	15%
Rental vehicle	12%	20%	3%	6%	9%	11%
Rideshare (Uber, Lyft, etc.)	5%	6%	2%	2%	2%	2%
Tour bus	0%	0%	0%	0%	2%	2%
RV	0%	0%	0%	0%	0%	0%
Train	0%	0%	0%	0%	0%	0%
Taxi or limo	0%	1%	0%	1%	0%	0%
Public bus	0%	1%	0%	0%	0%	0%
Other	0%	0%	0%	0%	1%	1%
Sample Size	1,326		954		2,179	

Arrival Airport

Tampa International (TIA) was the most common airport used by visitors (65%) who traveled to the destination by air, while St. Pete-Clearwater International (PIE) was used by just over one-quarter (26%) of those arriving by air. Fewer visitors used TIA than last year (69%), while more visitors used PIE than last year (18%).

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. 2,035 responses.

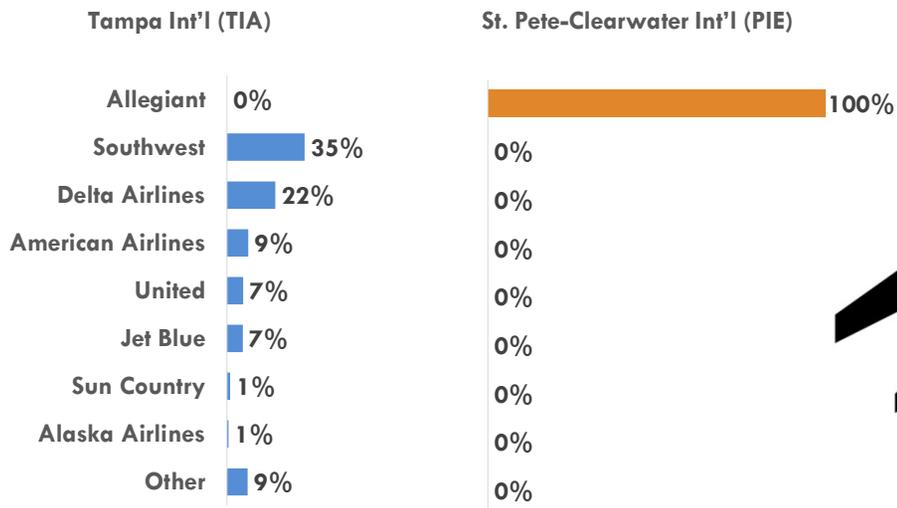
Detail by Type of Visitor

	Hotel	VFR	Day Trip
Tampa Int'l.	67%	71%	62%
St. Pete-Clearwater Int'l.	24%	25%	29%
Orlando Int'l.	6%	1%	5%
Sarasota/Bradenton Int'l.	1%	2%	2%
Miami Int'l.	1%	1%	0%
Jacksonville Int'l.	0%	0%	1%
Ft. Lauderdale Int'l.	0%	0%	0%
SW Fl Int'l. (Ft. Myers)	0%	0%	0%
Palm Beach Int'l.	0%	0%	0%
Sanford Int'l.	0%	0%	0%
Other	0%	0%	1%
Sample Size	577	456	345

Arrival Airline by Airport

All air travelers who arrived in to the area via St. Pete-Clearwater International did so using Allegiant (100%). Visitors arriving via Tampa International airport used Southwest (35%), Delta (22%) and American Airlines (9%).

Figure 8: Arrival Airline Airport



Detail by Type of Visitor

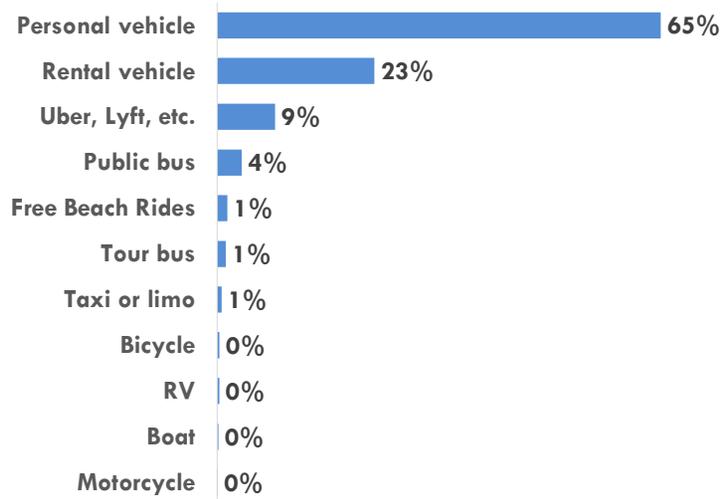
	Hotel		VFR		Day Trip	
	TIA	PIE	TIA	PIE	TIA	PIE
Allegiant	0%	100%	0%	100%	0%	100%
Southwest	33%	0%	35%	0%	33%	0%
Delta Airlines	21%	0%	21%	0%	26%	0%
American Airlines	9%	0%	11%	0%	9%	0%
United	7%	0%	8%	0%	4%	0%
Jet Blue	7%	0%	7%	0%	8%	0%
Sun Country	1%	0%	0%	0%	2%	0%
Alaska Airlines	1%	0%	0%	0%	0%	0%
Other	11%	0%	9%	0%	6%	0%
Sample Size	526		435		314	

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. 1,874 responses.

Transportation Used in Market

Personal vehicle (65%) was the most used form of transportation in market, which is down from last year (72%). Almost one-in-ten (9%) visitors used Uber/Lyft to get around Pinellas Co., which is up from last year (5%).

Figure 9: Transportation Used In-Market



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. 5,751 responses.

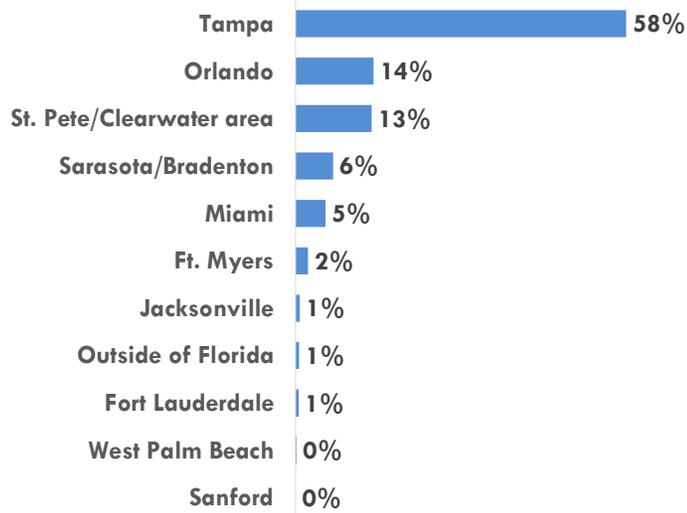
Detail by Type of Visitor

	Hotel	VFR	Day Trip
Personal vehicle	39%	82%	75%
Rental vehicle	39%	13%	16%
Uber, Lyft, etc.	20%	7%	5%
Public bus	6%	5%	2%
Free Beach Rides	2%	2%	1%
Tour bus	0%	0%	2%
Taxi or limo	1%	0%	1%
Bicycle	1%	1%	0%
RV	0%	0%	0%
Boat	0%	0%	0%
Motorcycle	0%	0%	0%
Sample Size	1,326	954	2,179

Car Rental Pick-up Location

Over half of all visitors who arrived by rental car (58%) picked up their rental car in Tampa, which is down from last year (69%).

Figure 10: Rental Vehicle Pick-up City



Question: In which city did you rent your rental vehicle? (Select one)
 Base: Respondents who arrived in the area by rental car. 1,459 responses.

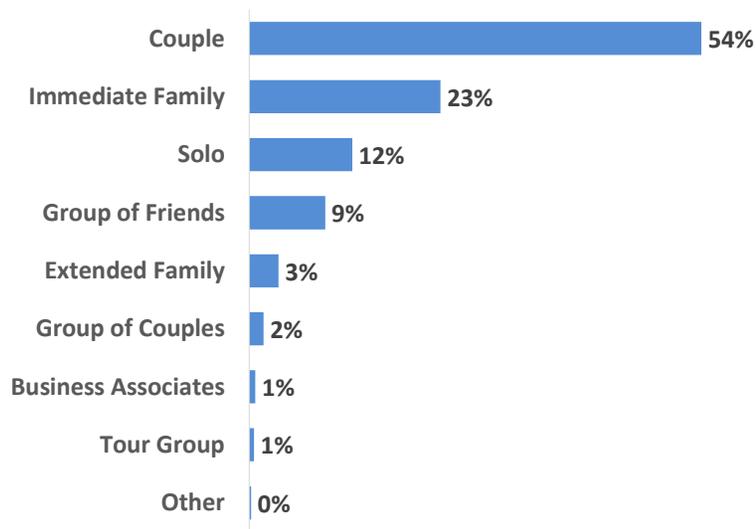
Detail by Type of Visitor

	Hotel	VFR	Day Trip
Tampa	61%	71%	50%
Orlando	14%	5%	16%
St. Petersburg/ Clearwater area	15%	16%	9%
Sarasota/Bradenton	2%	1%	13%
Miami	6%	3%	6%
Ft. Myers	1%	1%	4%
Jacksonville	0%	1%	1%
Outside of Florida	1%	2%	0%
Fort Lauderdale	0%	0%	1%
West Palm Beach	0%	0%	0%
Sanford	0%	0%	0%
Sample Size	509	123	290

Travel Party Composition

Visitors most commonly came as a couple (54%), which is up slightly from last year (51%). In addition, one-quarter traveled with their immediate family (23%) and just over one-in-ten traveled alone (12%). The most likely to travel solo were VFRs (33%), while Hotel Guests were the most likely to travel as a couple (60%).

Figure 11: Travel Party Composition



Question: Which best describes your travel group on this trip? Are you...? (Select all that apply)
 Base: All Respondents. 5,751 responses.

Detail by Type of Visitor

	Hotel	VFR	Day Trip
Couple	60%	43%	52%
Immediate Family	20%	20%	24%
Solo	7%	33%	13%
Group of Friends	7%	6%	10%
Extended Family	4%	2%	3%
Group of Couples	2%	1%	2%
Business Associates	2%	0%	0%
Tour Group	0%	0%	1%
Other	0%	0%	0%
Sample Size	1,326	954	2,179

Travel Party Size

The typical travel group was comprised of 2.4 people, including 2.2 adults, which is similar to last year. Only one-in-ten visitors traveled with children (13%), which is down from last year (19%).

Figure 12: Travel Party Size

	Mean
Male adults (18 yrs. +)	1.0
Female adults (18 yrs. +)	1.2
Male children (0 to 17 yrs.)	0.1
Female children (0 to 17 yrs.)	0.1
Average Travel Party Size	2.4
Percent with children in party	13%

Question: How many people of each type are in your immediate travel party, including yourself?
 Base: All Respondents. 5,701 responses.

Detail by Type of Visitor

	Hotel	VFR	Day Trip
Male adults (18 yrs. +)	1.0	0.8	1.0
Female adults (18 yrs. +)	1.2	1.1	1.2
Male children (0 to 17 yrs.)	0.1	0.1	0.1
Female children (0 to 17 yrs.)	0.1	0.1	0.1
Average Travel Party Size	2.4	2.1	2.4
Percent with Children in Party	14%	8%	13%
Sample Size	1,310	952	2,161

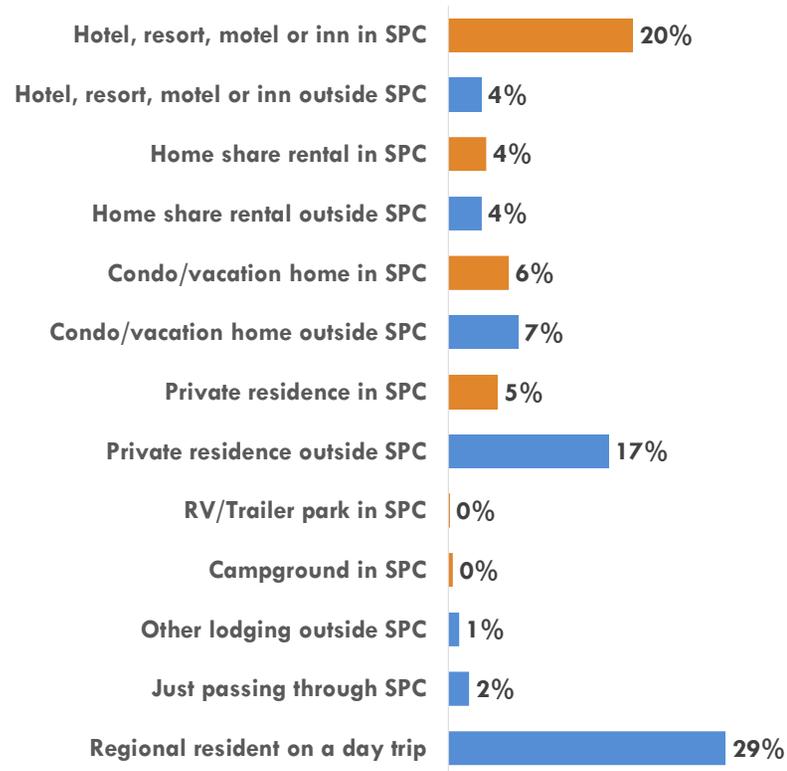
Lodging Type

Over one-third of all St. Pete/Clearwater area visitors stayed overnight in the destination (36%), almost all of whom stayed in paid accommodations. These are similar to last year.

Regional Day Trippers represented almost one-third of visitors (29%), again similar to last year (27%).

Question: Where are you staying overnight on this trip to the St. Pete/Clearwater area? (Select one)
Base: All Respondents. 5,751 responses.

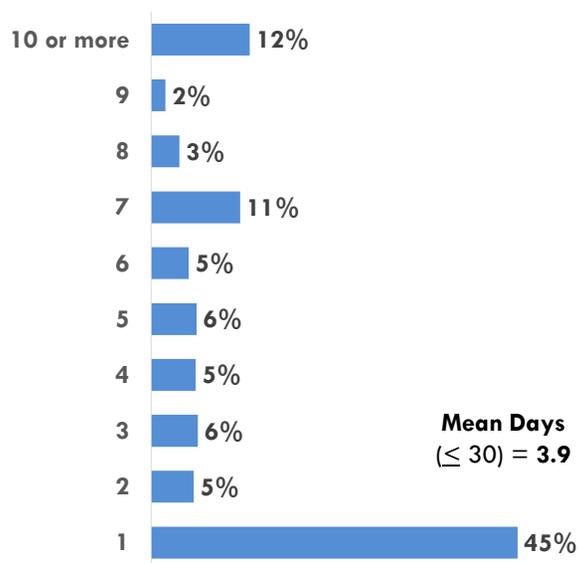
Figure 13: Type of Lodging



Days Spent in St. Pete/Clearwater

The average visitor spent four (4) days in the St. Pete/Clearwater area, which is up from last year (3 days). VFRs had the longest reported length of stay averaging over seven (7) days, while Hotel Guests stayed an average of just over five (5) days.

Figure 14: Days in Market



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. 5,381 responses.

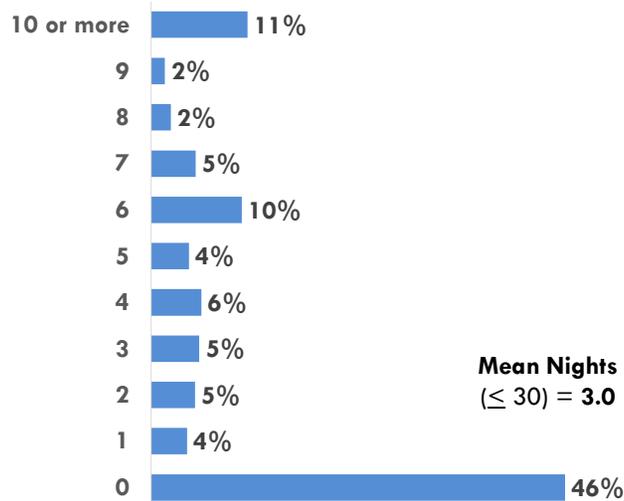
Detail by Type of Visitor

	Hotel	VFR	Day Trip
10 or more	8%	28%	--
9	1%	2%	--
8	3%	4%	--
7	19%	22%	--
6	8%	11%	--
5	12%	11%	--
4	15%	10%	--
3	16%	8%	--
2	13%	3%	--
1	4%	1%	100%
Mean Days (<30)	5.2	7.1	--
Sample Size	1,313	851	2,129

Nights Spent in St. Pete/Clearwater

Visitors spent an average of three (3) nights in the St. Pete/Clearwater area, which is also up from last year (2.4 nights). One-in-five visitors spent a week or more in the destination (20%), which is up significantly from last year (9%).

Figure 15: Nights in Market



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. 5,387 responses.

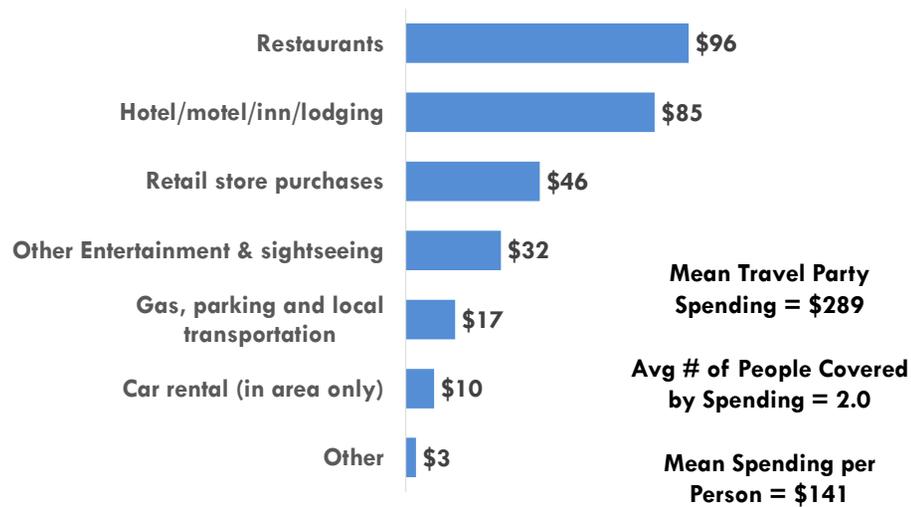
Detail by Type of Visitor

	Hotel	VFR
10 or more	6%	25%
9	2%	4%
8	2%	1%
7	7%	8%
6	17%	21%
5	8%	10%
4	14%	10%
3	15%	10%
2	15%	7%
1	12%	2%
0	3%	2%
Mean Nights (<30)	4.3	6.4
Sample Size	1,313	852

Daily Spend

The average travel party spent \$289 in Pinellas Co., with the average visitor spending \$141 daily in-market, which is similar to last year (\$289 and \$118, respectively). Unsurprisingly, those staying in hotels (\$484) had a daily spend much higher than average, but less than last year (\$504).

Figure 16: Per Day Travel Party Spending



Detail by Type of Visitor

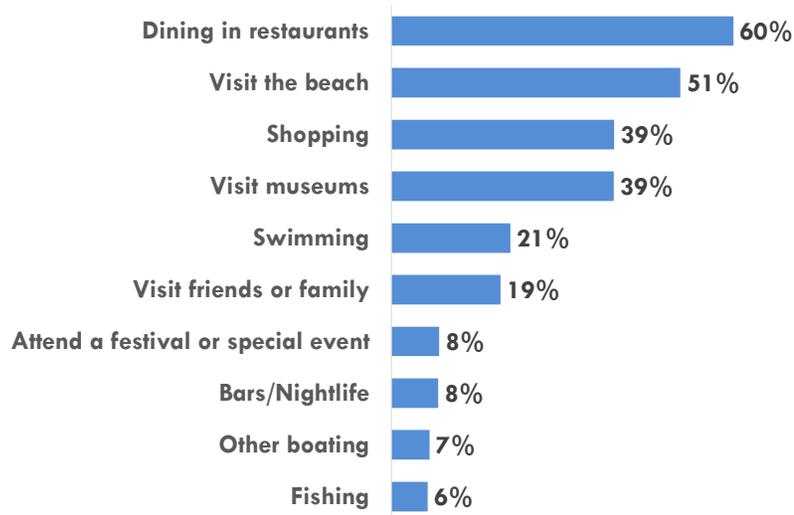
	Hotel	VFR	Day Trip
Restaurants	\$122	\$81	\$89
Hotel/motel/inn/lodging	\$238	\$12	\$32
Retail store purchases	\$53	\$42	\$44
Other Entertainment & sightseeing	\$28	\$22	\$36
Gas, parking and local transportation	\$17	\$9	\$18
Car rental (in area only)	\$20	\$6	\$5
Other	\$5	\$5	\$3
Mean Spending per Travel Party	\$484	\$177	\$227
# of People Covered by Spending	2.1	1.8	2.0
Mean Spending per Person	\$226	\$100	\$113
Sample Size	1,311	929	2,095

Question: PER DAY, approximately how much will you spend on each of the following while in the St. Pete/Clearwater area? Base: All Respondents. 5,607 responses.

Top Trip Activities

St. Pete/Clearwater visitors dined in restaurants (60%), visited the beach (51%), went shopping (39%), and/or visited museums (39%), all of which are similar to the top trip activities last year.

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. 5,751 responses.

Detail by Type of Visitor

	Hotel	VFR	Day Trip
Dining in restaurants	76%	72%	52%
Visit the beach	74%	68%	37%
Shopping	53%	51%	30%
Visit museums	33%	44%	41%
Swimming	35%	29%	11%
Visit friends or family	10%	62%	19%
Attend a festival or special event	8%	11%	8%
Bars/Nightlife	19%	13%	3%
Other boating	11%	8%	3%
Fishing	6%	8%	5%
Sample Size:	1,326	954	2,179

All Trip Activities

	Total	Hotel	VFR	Day Trip
Dining in restaurants	60%	76%	72%	52%
Visit the beach	51%	74%	68%	37%
Shopping	39%	53%	51%	30%
Visit museums	39%	33%	44%	41%
Swimming	21%	35%	29%	11%
Visit friends or family	19%	10%	62%	19%
Attend a festival or special event	8%	8%	11%	8%
Bars/Nightlife	8%	19%	13%	3%
Other boating	7%	11%	8%	3%
Fishing	6%	6%	8%	5%
Jet skiing	3%	4%	2%	3%
Attend or participate in a sporting event	3%	5%	3%	3%
Take a dining cruise	3%	5%	2%	2%
Golf	2%	3%	4%	1%
Guided tour	2%	3%	3%	1%
Biking	2%	2%	4%	1%
Shelling	2%	3%	2%	2%
Photography	2%	2%	2%	1%
Sailing	1%	1%	2%	2%
Visit breweries and/or distilleries	1%	2%	3%	0%
Kayaking/Canoeing	1%	1%	2%	1%
Bird watching	1%	1%	1%	1%
Parasailing	1%	1%	1%	0%
Baseball Spring Training	0%	1%	0%	0%
Paddle boarding	0%	1%	1%	0%
Sample Size	5,751	1,326	954	2,179

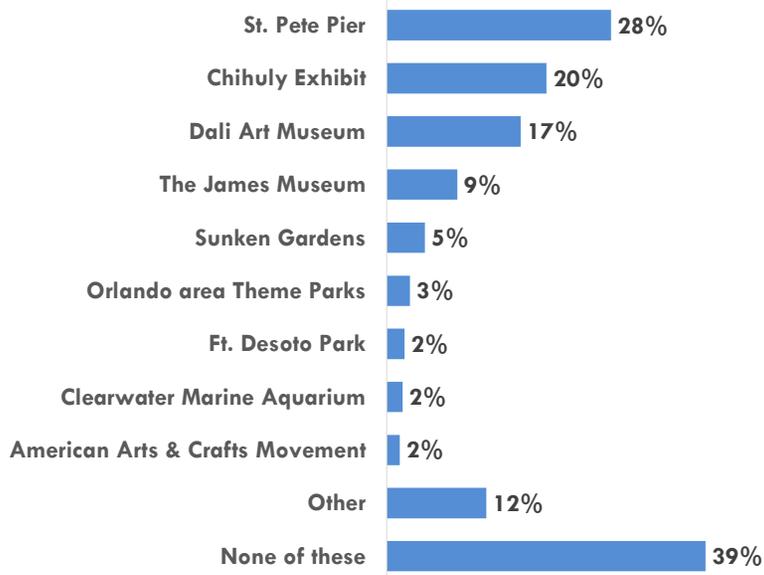
Question: Which of these activities did you, or will you, participate in while in the St. Pete/Clearwater area? (Select all that apply)

Base: All Respondents. 5,751 responses.

Attractions Visited

While in the St. Pete/Clearwater area, visitors went to the **St. Pete Pier (28%)**, the **Chihuly Exhibit (20%)** and the **Dali Art Museum (17%)**. Almost two-in-five visitors did not go to any of the attractions listed (39%), which is significantly less than last year (51%).

Figure 18: Attractions Visited



Question: Which of these attractions did you (or will you) visit while on this trip? (Select all that apply)
 Base: All Respondents. 5,751 responses.

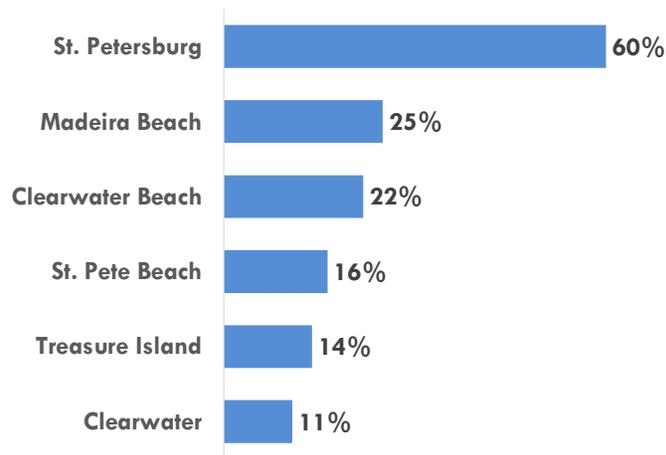
Detail by Type of Visitor

	Hotel	VFR	Day Trip
St. Pete Pier	32%	39%	24%
Chihuly Exhibit	20%	25%	19%
Dali Art Museum	19%	20%	15%
The James Museum	5%	11%	10%
Sunken Gardens	6%	8%	3%
Orlando area Theme Parks	3%	1%	3%
Ft. Desoto Park	2%	6%	1%
Clearwater Marine Aquarium	5%	2%	1%
American Arts & Crafts Movement	3%	3%	1%
Other	13%	16%	11%
None of these	43%	31%	39%
Sample Size	1,326	954	2,179

Communities Visited

St. Petersburg (60%), Madeira Beach (25%), and Clearwater Beach (22%) were the most popular among Pinellas Co. visitors, all of which are similar to last year.

Figure 19: 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. 5,751 responses.

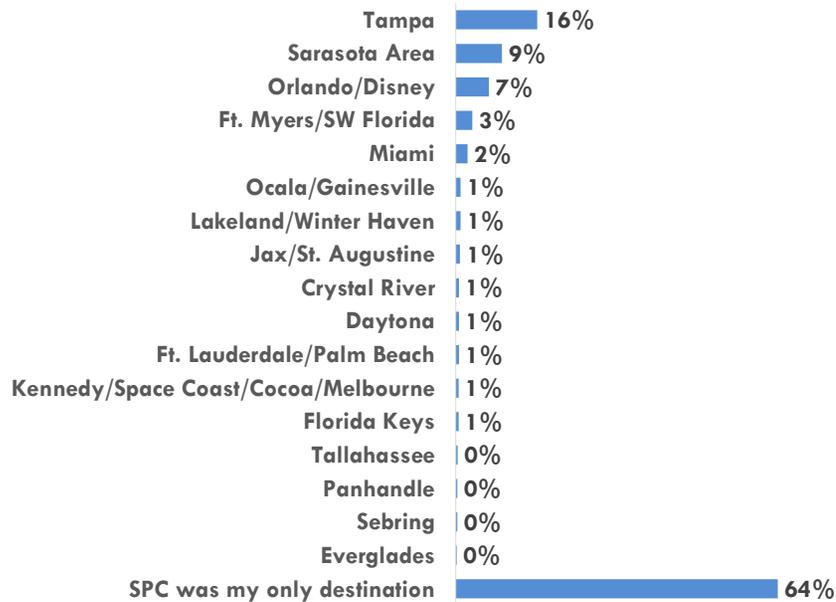
Detail by Type of Visitor

	Total	Hotel	VFR	Day Trip
St. Petersburg	60%	50%	68%	62%
Madeira Beach	25%	26%	31%	19%
Clearwater Beach	22%	36%	28%	14%
St. Pete Beach	16%	26%	29%	10%
Treasure Island	14%	16%	15%	11%
Clearwater	11%	12%	13%	10%
Dunedin	6%	8%	12%	3%
Indian Shores & Indian Rocks Beach	4%	3%	14%	1%
Largo	3%	2%	8%	3%
Pass-A-Grille Beach	3%	3%	9%	1%
Tarpon Springs	2%	3%	6%	1%
Gulfport	2%	1%	6%	1%
Seminole	2%	1%	4%	1%
North Redington Beach	2%	2%	6%	0%
Pinellas Park	1%	1%	3%	1%
Palm Harbor	1%	0%	2%	1%
Safety Harbor	1%	1%	2%	0%
Tierra Verde	1%	1%	1%	0%
Oldsmar	0%	0%	0%	0%
Sample Size	5,751	1,326	954	2,179

Other Destinations Visited

Less than half of visitors (46%) made trips to other destinations as part of their trip to Pinellas Co., which is significantly less than last year (55%). Visitors were most likely to have visited Tampa (16%), the Sarasota area (9%), and/or Orlando/Disney (7%).

Figure 20: Other Destinations Visited on Trip



Question: Which of these other destinations did you visit while on this trip? (Select all that apply) Base: All Respondents. 5,751 responses.

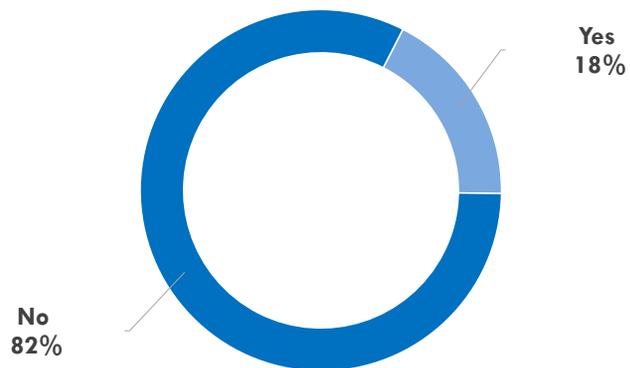
Detail by Type of Visitor

	Hotel	VFR	Day Trip
Tampa	10%	15%	18%
Sarasota Area	6%	5%	11%
Orlando/Disney	7%	4%	7%
Ft. Myers/SW Florida	3%	1%	4%
Miami	4%	2%	2%
Ocala/Gainesville	1%	1%	1%
Lakeland/Winter Haven	1%	0%	1%
Jax/St. Augustine	0%	1%	1%
Crystal River	1%	1%	1%
Daytona	1%	0%	1%
Ft. Lauderdale/Palm Beach	1%	0%	0%
Kennedy/Space Coast/Cocoa/Melbourne	1%	0%	1%
Florida Keys	1%	1%	0%
Tallahassee	0%	1%	0%
Panhandle	1%	0%	0%
Sebring	0%	0%	0%
Everglades	0%	1%	0%
SPC was my only destination	73%	72%	60%
Sample Size	1,326	954	2,179

First Visit to Florida

Nearly one-in-ten (18%) were in the state of Florida for the first time, which is up significantly from last year (6%). First time visitation was nearly identical for Hotel Guests, VFRs, and Day trippers.

Figure 21: First-Time Visitors to Florida



Question: Is this your first visit to Florida? Base: All Respondents. 5,564 responses.

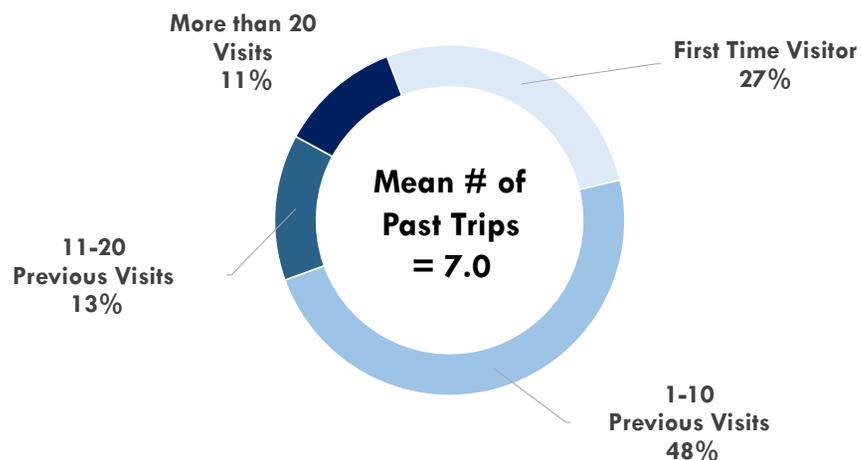
Detail by Type of Visitor

	Hotel	VFR	Day Trip
Yes	18%	15%	19%
No	82%	85%	81%
Sample Size	1,297	924	2,088

Previous Visitation to St. Pete/Clearwater

St. Pete/Clearwater area visitors had made an average of seven (7) previous trips to the area, which is significantly less than last year (11 previous trips).

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



Question: Prior to this visit, how many times have you been to the St. Pete/Clearwater area?
 Base: All Respondents. 4,775 responses.

Detail by Type of Visitor

	Hotel	VFR	Day Trip
First-time Visitors	38%	22%	24%
1-10 Previous Visits	49%	58%	45%
11-20 Previous Visits	8%	13%	16%
More than 20 Previous Visits	4%	8%	15%
Mean	4.1	6.3	8.2
Sample Size	1,118	831	1,695

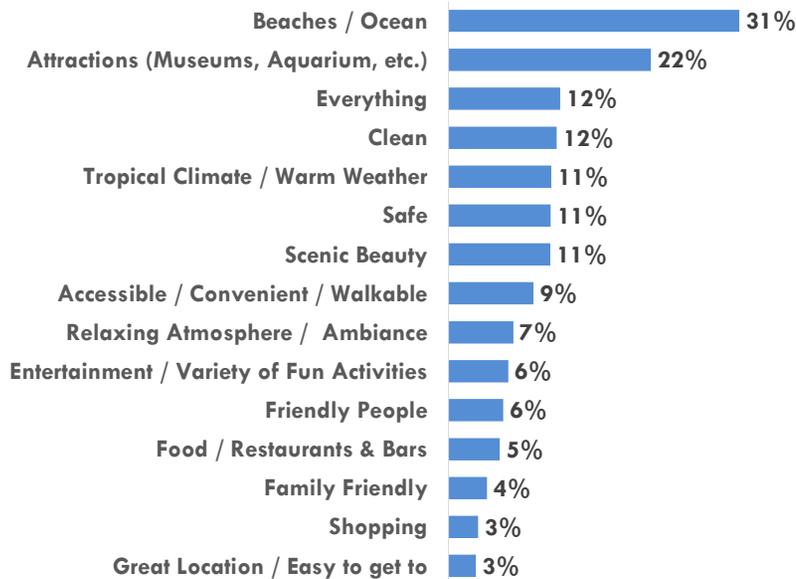
An aerial photograph of a large resort complex, likely the Grand Wailea in Maui, Hawaii. The central focus is a grand, multi-story building with a red-tiled roof and several towers. In front of the main building are several swimming pools and lush greenery. A long, narrow bridge extends from the resort across a body of water towards the background. The surrounding area includes other resort buildings, parking lots, and a coastline with houses and palm trees. The sky is clear and blue.

VISITOR SATISFACTION

Most Liked Aspect

Beaches (31%) remain the most liked aspect of the St. Pete/Clearwater area, followed by attractions (22%). Hotel Guests are most likely to like the beaches (41%).

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. 5,751 responses.

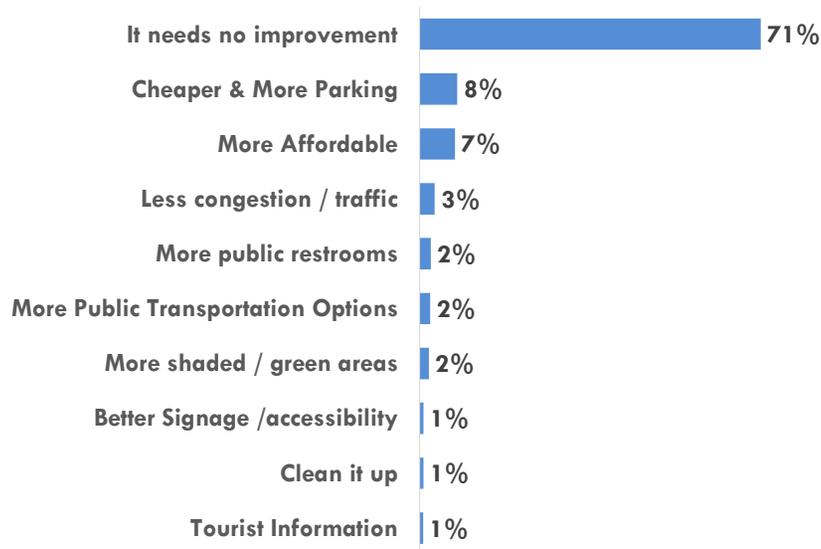
Detail by Type of Visitor

	Hotel	VFR	Day Trip
Beaches / Ocean	41%	31%	27%
Attractions (Museums, Aquarium, etc.)	14%	12%	27%
Everything	12%	19%	10%
Clean	11%	9%	13%
Tropical Climate / Warm Weather	17%	19%	7%
Safe	9%	8%	12%
Scenic Beauty	13%	12%	10%
Accessible / Convenient / Walkable	11%	6%	9%
Relaxing Atmosphere / Ambiance	9%	11%	5%
Entertainment / Variety of Fun Activities	4%	5%	8%
Friendly People	5%	11%	6%
Food / Restaurants & Bars	5%	6%	6%
Family Friendly	4%	7%	4%
Shopping	2%	3%	3%
Great Location / Easy to get to	3%	3%	3%
Sample Size:	1,326	954	2,179

Attractions or Services that Would Enhance the Destination Experience

The majority of visitors said that the destination needs no improvement (71%), which is less than last year (85%). Of the suggestions provided, cheaper/more parking (8%) and affordability (7%) were cited most often, which is similar to last year.

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. 5,751 responses.

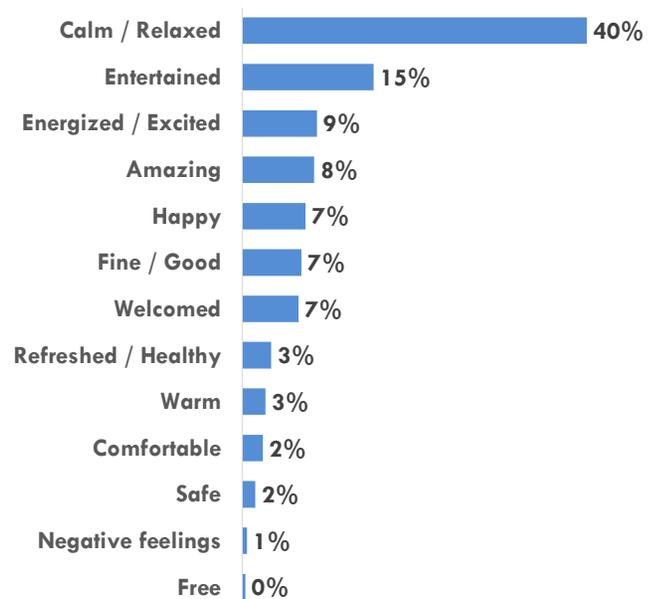
Detail by Type of Visitor

	Hotel	VFR	Day Trip
It needs no improvement	70%	71%	71%
Cheaper & More Parking	7%	6%	8%
More Affordable	6%	5%	8%
Less congestion / traffic	3%	5%	3%
More public restrooms	1%	2%	3%
More Public Transportation Options	2%	2%	2%
More shaded / green areas	2%	2%	2%
Better Signage /accessibility	1%	1%	1%
Clean it up	1%	1%	1%
Tourist Information	1%	0%	1%
Sample Size:	1,326	954	2,179

Feelings in St. Pete/Clearwater

St. Pete/Clearwater area visitors felt calm (40%) while in the destination, which is down from last year (62%). Less than one-in-ten (7%) felt happy, which is significantly less than last year (38%).

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. 5,751 responses.

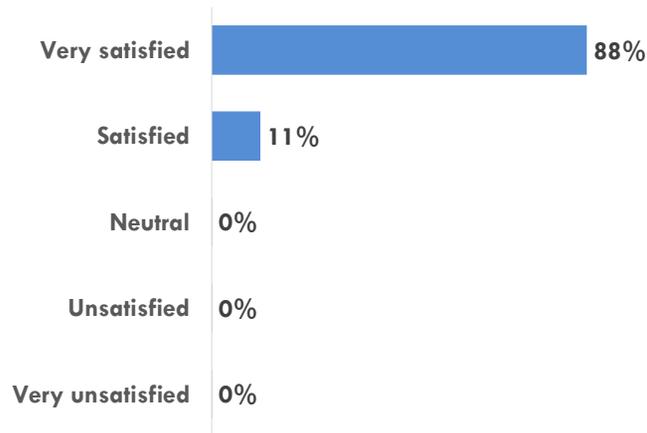
Detail by Type of Visitor

	Hotel	VFR	Day Trip
Calm / Relaxed	47%	44%	35%
Entertained	8%	9%	20%
Energized / Excited	10%	7%	9%
Amazing	10%	8%	7%
Happy	7%	10%	7%
Fine / Good	5%	5%	8%
Welcomed	5%	13%	7%
Refreshed / Healthy	5%	2%	3%
Warm	3%	4%	3%
Comfortable	2%	3%	2%
Safe	1%	2%	2%
Negative feelings	1%	0%	1%
Free	0%	1%	0%
Sample Size	1,326	954	2,179

Overall Satisfaction

Visitors to the St. Pete/Clearwater area continue to have high satisfaction with the destination (99%), with almost nine-in-ten being “very satisfied” with their experience in the destination (88%). These are similar to last year (100% and 97%, respectively).

Figure 26: Overall Satisfaction



Question: How satisfied are you with your experience in the St. Pete/Clearwater area on this trip?
 (Select one) Base: All Respondents. 5,700 responses.

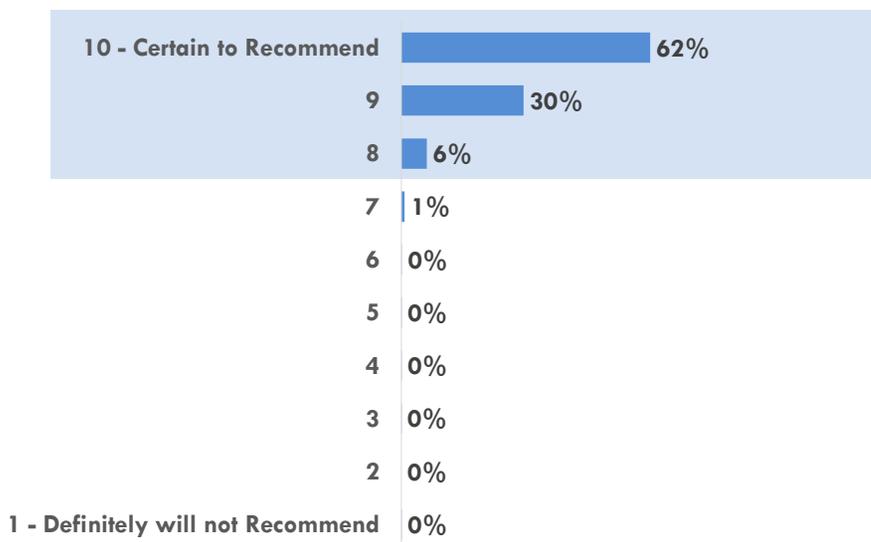
Detail by Type of Visitor

	Hotel	VFR	Day Trip
Very satisfied	92%	90%	86%
Satisfied	7%	10%	14%
Neutral	0%	0%	0%
Unsatisfied	0%	0%	0%
Very unsatisfied	0%	0%	0%
Sample Size	1,318	949	2,152

Likelihood to Recommend

Visitors are very likely to recommend (98% Top-3 Box) the St. Pete/Clearwater area to others, which is similar to last year.

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. 5,724 responses.

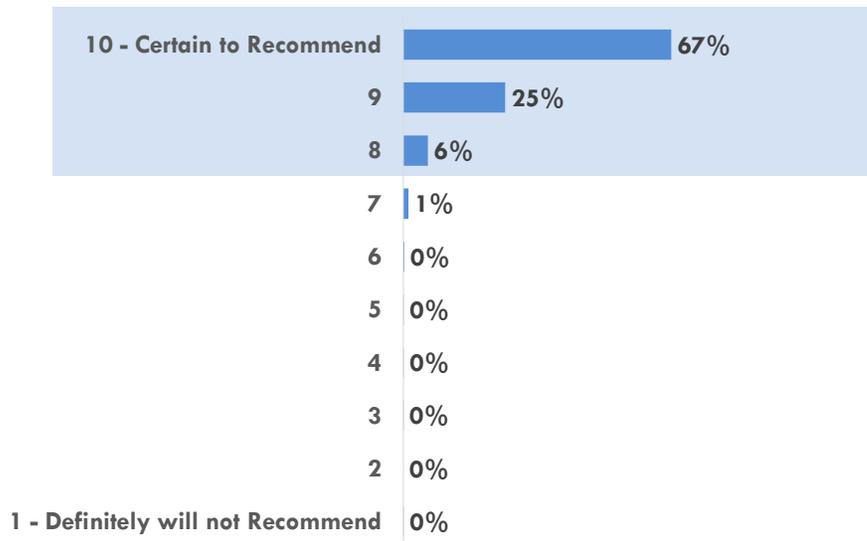
Detail by Type of Visitor

	Hotel	VFR	Day Trip
10--Certain to Recommend	64%	65%	61%
9	29%	26%	31%
8	5%	8%	6%
7	1%	1%	1%
6	0%	0%	0%
5	0%	0%	0%
4	0%	0%	0%
3	0%	0%	0%
2	0%	0%	0%
1--Definitely WILL NOT Recommend	0%	0%	0%
Sample Size	1,325	949	2,166

Likelihood to Return

Visitors are highly likely to return (99% Top-3 Box) to the St. Pete/Clearwater area in the future, which is similar to last year.

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. 5,699 responses.

Detail by Type of Visitor

	Hotel	VFR	Day Trip
10 – Certain to return	71%	73%	64%
9	21%	21%	28%
8	5%	5%	7%
7	2%	1%	1%
6	0%	0%	0%
5	0%	0%	0%
4	0%	0%	0%
3	0%	0%	0%
2	0%	0%	0%
1 –Definitely will NOT return	0%	0%	0%
Sample Size	1,316	945	2,161

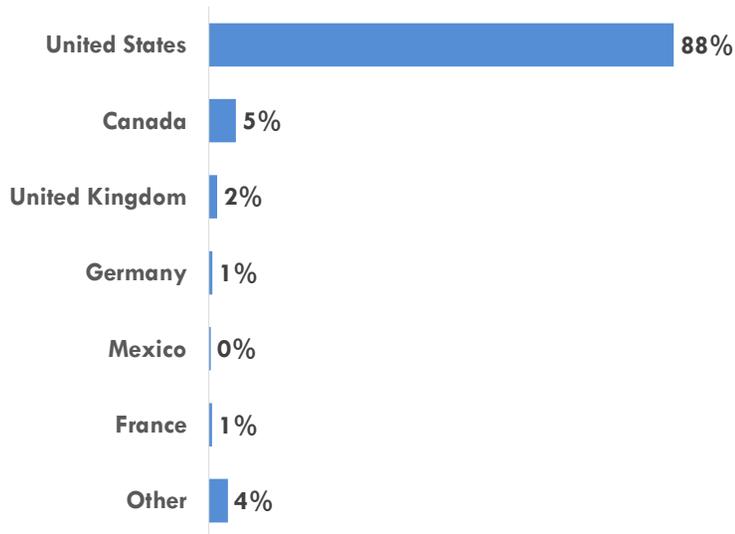
An aerial photograph of a coastal city, likely St. Augustine, Florida. The image shows a large body of water in the foreground, a long bridge crossing a narrow channel, and a dense urban area with many buildings. The central focus is a large, multi-story building complex with a prominent tower and a red-tiled roof. The text "POINT OF ORIGIN & DEMOGRAPHIC PROFILE" is overlaid in the center in a bold, blue, sans-serif font.

POINT OF ORIGIN & DEMOGRAPHIC PROFILE

Point Of Origin: Country

Nearly all St. Pete/Clearwater visitors surveyed lived in the United States (88%).

Figure 29: Country of Origin



Question: In what country do you reside? Base: All Respondents. 5,495 responses.

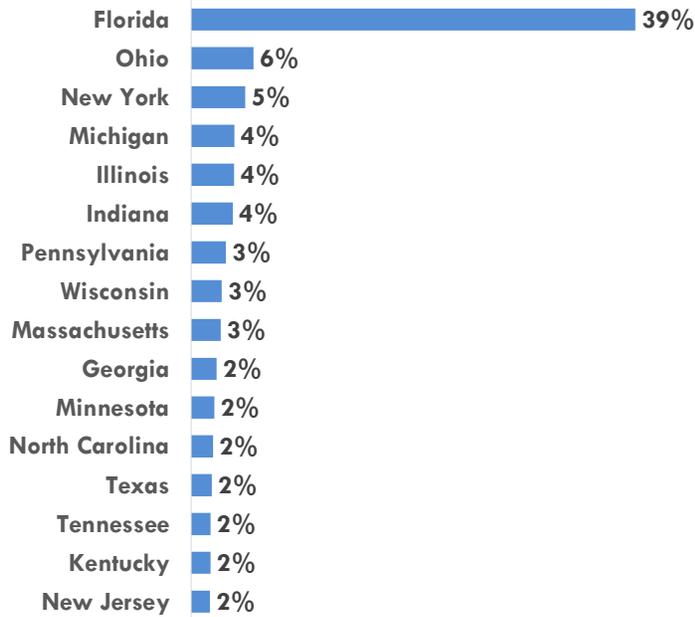
Detail by Place of Stay

	Hotel	VFR	Day Trip
United States	89%	89%	88%
Canada	3%	5%	5%
United Kingdom	2%	1%	1%
Germany	1%	0%	1%
Mexico	0%	0%	0%
France	1%	0%	1%
Other	3%	4%	4%
Sample Size	1,263	912	2,084

Point Of Origin: Top States of Residence

Nearly four-in-ten visitors surveyed live in-state within Florida (39%). Ohio (6%) and New York (5%) were the top non-Florida states of origination. Unsurprisingly, Day Trippers were the likeliest segment to be Florida residents (52%).

Figure 30: State of Origin



Question: What is your zip/postal code? Base: Domestic respondents. 4,881 responses.

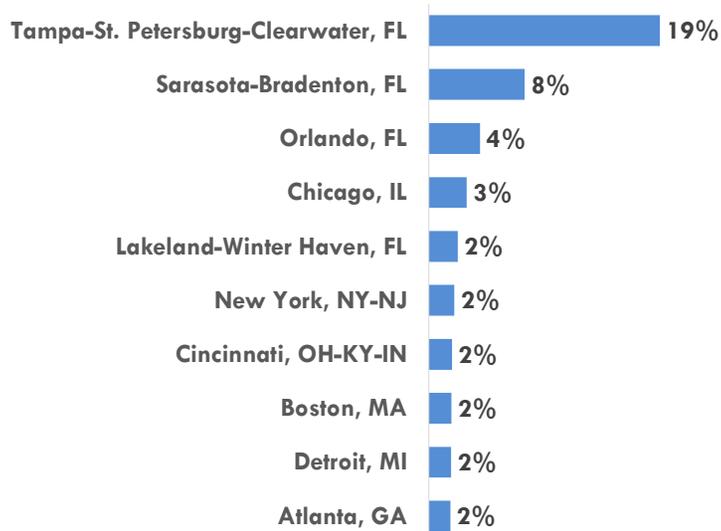
Detail by Place of Stay

	Hotel	VFR	Day Trip
Florida	23%	10%	52%
Ohio	7%	7%	4%
New York	8%	6%	4%
Michigan	5%	4%	3%
Illinois	5%	5%	3%
Indiana	4%	4%	3%
Pennsylvania	4%	4%	2%
Wisconsin	3%	3%	2%
Massachusetts	3%	3%	2%
Georgia	3%	5%	2%
Minnesota	3%	4%	1%
North Carolina	2%	3%	2%
Texas	2%	4%	2%
Tennessee	2%	2%	1%
Kentucky	2%	2%	1%
New Jersey	2%	2%	2%
Sample Size	1,144	812	1,863

Point Of Origin: Top MSAs

The top in-state visitor markets continue to be Tampa (19%), Sarasota-Bradenton (8%), and Orlando (4%). The top out-of-state markets were Chicago (3%), New York (2%), Cincinnati (2%), Boston (2%), Detroit (2%), and Atlanta (2%).

Figure 31: MSA



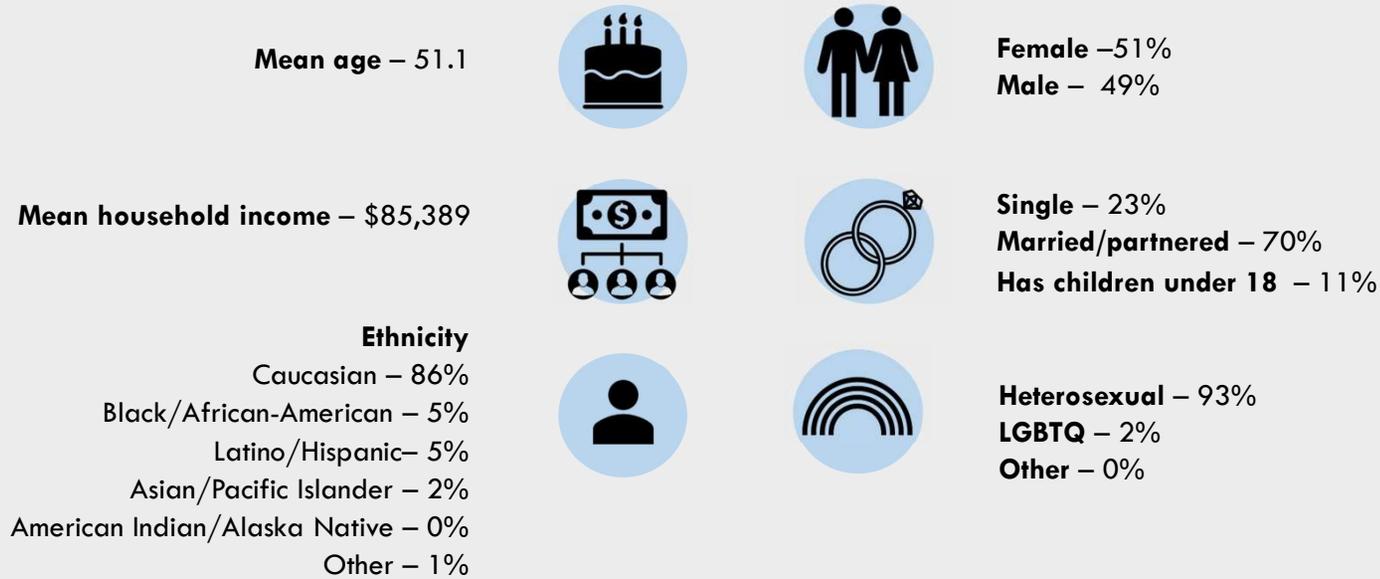
Question: What is your zip/postal code? Base: Domestic respondents. 4,291 responses.

Detail by Place of Stay

	Hotel	VFR	Day Trip
Tampa-St. Petersburg-Clearwater, FL	5%	1%	28%
Sarasota-Bradenton, FL	1%	1%	12%
Orlando, FL	4%	1%	5%
Chicago, IL	4%	5%	2%
Lakeland-Winter Haven, FL	2%	0%	3%
New York, NY-NJ	3%	3%	2%
Cincinnati, OH-KY-IN	2%	2%	2%
Boston, MA	3%	2%	1%
Detroit, MI	3%	3%	1%
Atlanta, GA	2%	3%	1%
Sample Size	1,014	701	1,698

Demographic Profile

The following represents the demographic profile for all St. Pete/Clearwater area visitors surveyed in the 2022 – 2023 fiscal year.



**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 represents the demographic profile for all St. Pete/Clearwater area visitors surveyed in the 2022 – 2023 fiscal year.

	Hotel	VFR	Day Trip
Female	49%	57%	51%
Male	51%	43%	49%
Mean Age	49.5	52.3	51.3
Single	17%	31%	\$89,489
Married	77%	56%	\$89,489
Has Children	14%	8%	\$89,489
Annual Household Income	\$89,489	\$78,640	\$84,740

	Hotel	VFR	Day Trip
Caucasian	89%	88%	85%
Black/African-American	5%	6%	5%
Latino/Hispanic	3%	3%	6%
Asian/Pacific Islander	2%	1%	2%
American Indian/Alaska Native	0%	0%	1%
Other	1%	1%	1%
Heterosexual	94%	92%	92%
LGBTQ	2%	1%	2%