ST.PETE
CLEARWATER

Visit St. Pete/Clearwater

VISITOR PROFILE STUDY

Report of Findings
Q1 2023

Research prepared for Visit St. Pete/Clearwater by:

Destination ◆ Analysts

TABLE OF CONTENTS

Destination ◆ Analysts

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 comes from an in-person intercept survey of St. Pete/Clearwater area visitors (respondents must reside outside of Pinellas County) at locations throughout the destination. This interim report presents the topline data collected from visitors surveyed between January 2023 — March 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, 1,469 completed surveys from Pinellas County visitors were collected.

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

RESEARCH OVERVIEW & METHODOLOGY

Destination Analysts surveyed 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., reason for visiting, length of stay, place of stay, etc.)
- Travel party composition
- Activities and 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.

Q1 2023
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 – Q1 2023

The following are the key findings related to the economic impact of tourism to Pinellas County from January 2023 – March 2023.
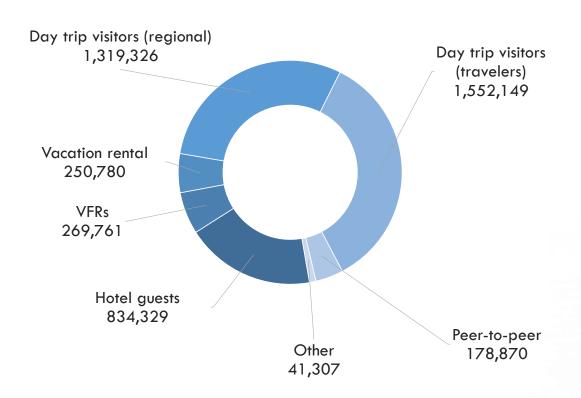
	January 2023	February 2023	March 2023	Q1 (January 2023 – March 2023)
Visitors	1,390,561	1,488,386	1,567,575	4,446,523
Direct Visitor Spending	$596,932,740	$683,304,344	$739,832,356	$2,020,069,440
Total Economic Impact of Tourism	$975,672,747	$1,121,250,679	$1,221,906,645	$3,318,830,071
Tax Revenues Generated	$36,231,130	$43,007,918	$50,310,140	$129,549,188
Hotel Room Nights	566,484	605,820	678,003	1,850,307
Visitor Industry Payroll	$308,835,163	$354,126,502	$384,189,521	$1,047,151,186
Jobs Supported	9,427	10,792	11,664	31,883

ECONOMIC IMPACT ESTIMATES: SUMMARY OF KEY FINDINGS

The following is a summary of key findings related to the economic impact of tourism to Pinellas County from January 2023 – March 2023:

- **Visitors to Pinellas County** – Pinellas County had over 4.4 million visitors. The largest segment of visitors this quarter were day trip visitors from outside the surrounding region, comprising 1.5 million, or 35%, of all visitors.

- **Direct Visitor Spending in Pinellas County** – The Pinellas County tourism industry generated $2.0 billion in direct visitor spending inside the county. The largest share of this spending was generated by hotel guests who stayed overnight in commercial lodging. These visitors were responsible for $1.05 billion, or 52%, of all visitor spending.

- **Total Economic Impact of Tourism to Pinellas County** – Tourism generated a total of $3.32 billion in economic impact for Pinellas County. The total economic impact is comprised of direct visitor spending, as well as indirect and induced effects.

- **Tax Revenues Generated for Pinellas County** – Pinellas County's tourism industry generated $129.5 million in tax revenues. 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 1.85 million hotel room nights were generated by visitors in Pinellas County.

- **Visitor Industry Payroll and Jobs supported** – The Pinellas County tourism industry had an estimated total combined payroll of $1.05 billion and supported 31,883 jobs county-wide.

VISITORS TO PINELLAS COUNTY

Day trip visitors (regional)
1,319,326

Day trip visitors
(travelers)
1,552,149

Vacation rental
250,780

VFRs
269,761

Hotel guests
834,329

Other
41,307

Peer-to-peer
178,870
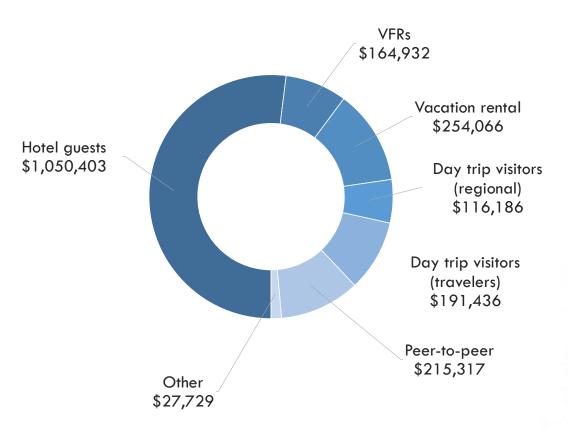
Visitors to Pinellas County, by type of visitor

Day trip visitors (travelers)	1,552,149
Day trip visitors (regional)	1,319,326
Hotel guests	834,329
VFRs	269,761
Vacation rental	250,780
Peer-to-peer	178,870
Other	41,307
TOTAL VISITORS	**4,446,523**
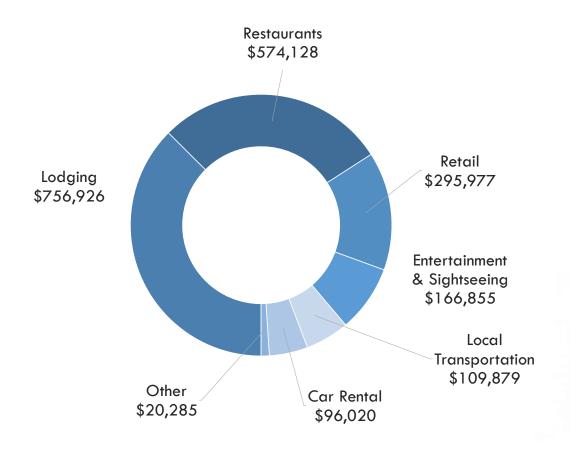
DIRECT VISITOR SPENDING: BY TYPE OF VISITOR

VFRs
$164,932

Vacation rental
$254,066

Day trip visitors
(regional)
$116,186

Hotel guests
$1,050,403

Day trip visitors
(travelers)
$191,436

Peer-to-peer
$215,317

Other
$27,729

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

Hotel guests	$1,050,403
VFRs	$164,932
Vacation rental	$254,066
Day trip visitors (regional)	$116,186
Day trip visitors (travelers)	$191,436
Peer-to-peer	$215,317
Other	$27,729
TOTAL DIRECT VISITOR SPENDING	**$2,020,069**
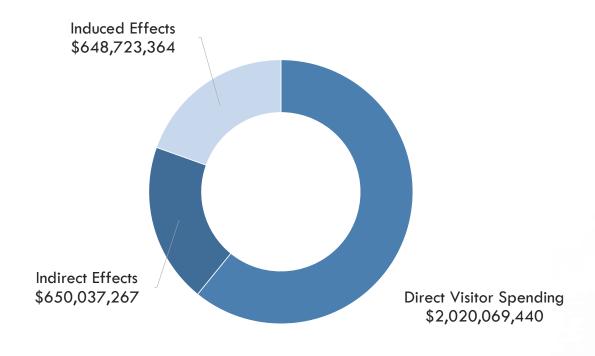
DIRECT VISITOR SPENDING: BY TYPE OF SPENDING

Restaurants
$574,128

Lodging
$756,926

Retail
$295,977

Entertainment
& Sightseeing
$166,855

Local
Transportation
$109,879

Other
$20,285

Car Rental
$96,020

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

Lodging	$756,926
Restaurants	$574,128
Retail	$295,977
Entertainment & Sightseeing	$166,855
Local Transportation	$109,879
Car Rental	$96,020
Other	$20,285
TOTAL DIRECT VISITOR SPENDING	**$2,020,069**

TOTAL ECONOMIC IMPACT

Induced Effects
$648,723,364

Indirect Effects
$650,037,267

Direct Visitor Spending
$2,020,069,440

Economic Impact Estimates, by type of effect

Direct Visitor Spending $2,020,069,440
Indirect Effects $650,037,267
Induced Effects $648,723,364

TOTAL ECONOMIC IMPACT   **$3,318,830,071**

TAX REVENUES GENERATED

Sales tax
$18,752,847

Hotel tax
$29,785,422

Property taxes
$81,010,919

Tax Revenues Generated, by type of tax

Property taxes	$81,010,919
Hotel Tax	$29,785,422
Sales tax	$18,752,847
TOTAL TAX REVENUES GENERATED	**$129,549,188**
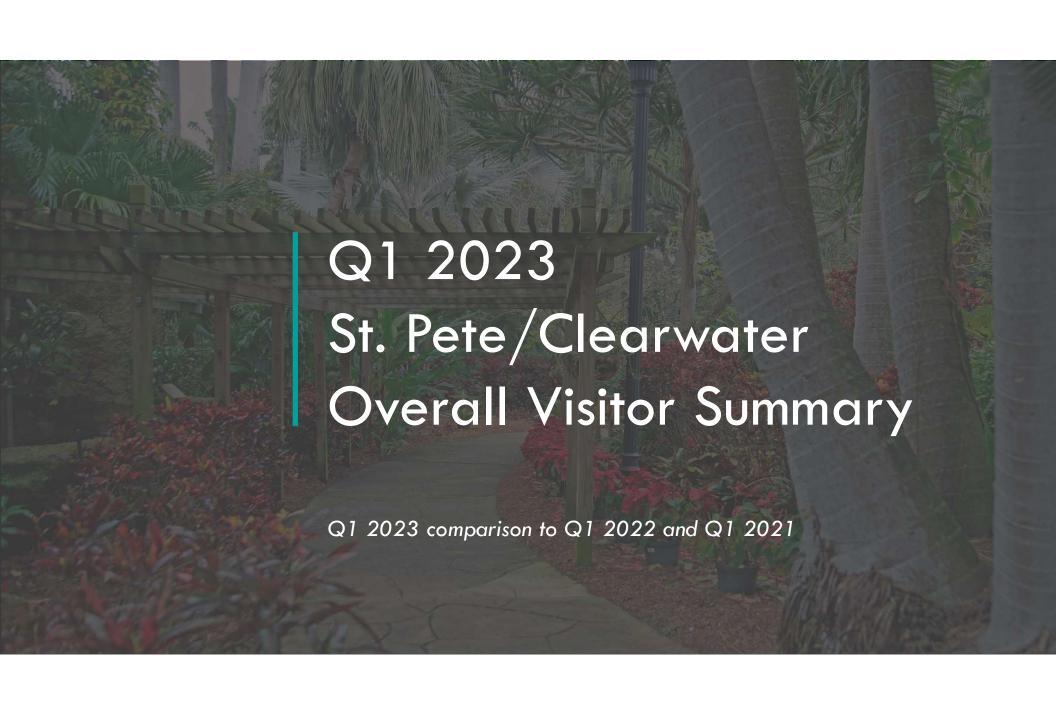
ECONOMIC IMPACT YOY COMPARISON

The following presents the estimated economic impact of tourism to Pinellas County comparing Q1 2023 to prior years.

- In Q1 2023, the travel and tourism industry in Pinellas County saw consistent growth in visitor volume and visitor spending. Volume in Q1 2023 is up 4.1% from 2022 and up 6.9% from 2019, the pre-pandemic benchmark. Direct visitor spending this quarter is also up 9.3% from Q1 2022 and total economic impact and taxes generated are both up over 11%.

- Spending habits have clearly shifted significantly since 2019, with growth in spending far exceeding growth in volume. Direct visitor spending in Q1 2023 is estimated to be up 26.5% from 2019 and total economic impact is estimated to be up 34.4% from 2019.

- Hotel room nights in Q1 2023 is up slightly compared to 2022 and is still shy of the 2019 benchmark (up 5.9% from 2022, but down -2.1% from 2019).

ECONOMIC IMPACT YOY COMPARISON

	Q1 2023	Q1 2022	% Change (Q1 '23 - Q1 '22)	Q1 2019	% Change (Q1 '23 - Q1 '29)
Visitors to Pinellas County	4,446,523	4,272,548	4.1%	4,158,793	6.9%
Direct Visitor Spending in Pinellas County	$2,020,069,440	$1,847,615,895	9.3%	$1,596,944,068	26.5%
Total Economic Impact of Tourism to Pinellas County	$3,318,830,071	$2,984,226,696	11.2%	$2,469,996,937	34.4%
Tax Revenues Generated for Pinellas County	$129,549,188	$116,418,507	11.3%	$93,716,593	38.2%
Hotel Room Nights	1,850,307	1,747,885	5.9%	1,890,373	-2.1%
Visitor Industry Payroll	$1,047,151,186	$957,175,518	9.4%	$797,237,733	31.3%
Jobs Supported	31,883	29,314	8.8%	25,093	27.1%

Q1 2023
St. Pete/Clearwater
Overall Visitor Summary

Q1 2023 comparison to Q1 2022 and Q1 2021

Visitor Summary: Quarterly Comparison

Average Time Between Decision to Visit & Arrival

Q1-21	Q1-22	Q1-23
60	39	62

Average Daily Spending

$330
Q1-23

$264
Q1-22

$268
Q1-21

Travel Party Size

2.2
Q1-23

Q1-22   2.2
Q1-21   2.5

Average Days & Nights

Nights: 2.5 (Q1-21), 2.8 (Q1-22), 3.5 (Q1-23)
Days: 3.3 (Q1-21), 3.5 (Q1-22), 4.3 (Q1-23)

■ Q1-21 ■ Q1-22 ■ Q1-23
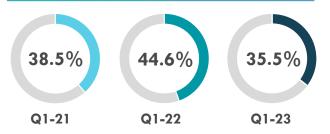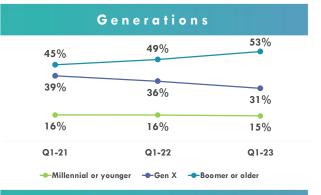
Percent Staying Overnight

Q1-21	Q1-22	Q1-23
38.5%	44.6%	35.5%

Generations

	Q1-21	Q1-22	Q1-23
Boomer or older	45%	49%	53%
Gen X	39%	36%	31%
Millennial or younger	16%	16%	15%

Millennial or younger — Gen X — Boomer or older

Average Age

Q1-21	Q1-22	Q1-23
50.8	51.1	52.0

Average Income

$77,760
Q1-23

Q1-22 $104,401
Q1-21 $111,830

Q1 2023
Visitor Summary
by Traveler Segment

THE BEACH GO-ER

Q1 2023

Results reflect visitors who said their primary motivation for visiting the St. Pete/Clearwater area was beaches that suit their taste.

Factors Important to Destination Decision

- Weather — **63%**
- Attractions in the area — **20%**
- Friends or family in the area — **11%**
- Scenic beauty — **7%**
- Restaurants, cuisine, food scene — **7%**
- Arts & cultural offerings — **6%**

Domestic vs. International

United States Resident, 83%

International Visitor, 17%

TOP STATES OF ORIGIN

Florida	21%
Michigan	11%
New York	10%

Top Communities Visited

Clearwater Beach	54%
St. Petersburg	51%
St. Pete Beach	25%
Madeira Beach	23%
Treasure Island	15%

Top Activities

Restaurants	Shopping	Swimming	Museums
81%	51%	30%	30%

Length of Stay

5.0 Days on Average

Travel Party Size

2.4 People

8% Traveled with Children

Daily Spending

$156 Per Person

Destination Analysts

THE ARTS & CULTURE VISITOR

Q1 2023

Results reflect 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

Attractions in the area	38%
Weather	15%
The area's unique culture	13%
Restaurants, cuisine, food scene	10%
Beaches that suit my tastes	9%
Scenic beauty	9%

Domestic vs. International

United States Resident, 95%

International Visitor, 5%

TOP STATES OF ORIGIN

Florida	49%
New York	8%
Massachusetts	5%

Top Communities Visited

St. Petersburg	95%
St. Pete Beach	20%
Clearwater Beach	9%
Pass-A-Grille Beach	8%
Treasure Island	8%

Top Activities

Restaurants	Shopping	Beach	Friends/Family
68%	39%	19%	15%

Length of Stay

2.5 Days on Average

Travel Party Size

2.2 People

3% Traveled with Children

Daily Spending

$110 Per Person

Destination Analysts

THE AFFLUENT VISITOR

Q1 2023

Results reflect visitors who reported having an annual household income of $150,000+

Factors Important to Destination Decision

Weather	68%
A specific attraction	17%
Friends or family in the area	16%
Scenic beauty	14%
Attractions in the area	12%
Arts & cultural offerings	11%

Domestic vs. International

United States Resident, 88%

International Visitor, 12%

TOP STATES OF ORIGIN

New York	13%
Indiana	10%
Florida	8%

Top Communities Visited

Clearwater	49%
St. Pete Beach	40%
Madeira Beach	40%
St. Petersburg	38%
Treasure Island	36%

Top Activities

64%	28%	25%	21%
Beach	Shopping	Museums	Jet skiing

Length of Stay

7.5 Days on Average

Travel Party Size

2.6 **People**

29% Traveled with Children

Daily Spending

$248

Per Person

Destination Analysts

THE FAMILY TRAVELER

Q1 2023

Results reflect visitors who were visiting the St. Pete/ Clearwater area with children under the age of 18

Factors Important to Destination Decision

- Weather — 51%
- Beaches that suit my tastes — 16%
- Friends or family in the area — 13%
- St. Pete Pier — 13%
- Scenic beauty — 12%
- Attractions in the area — 11%

Domestic vs. International

United States Resident, 86%

International Visitor, 14%

TOP STATES OF ORIGIN

Florida	26%
Michigan	11%
Wisconsin	7%

Top Communities Visited

St. Petersburg	43%
Clearwater Beach	42%
Clearwater	35%
Madeira Beach	30%
Treasure Island	17%

Top Activities

57%	45%	41%	27%
Beach	Shopping	Restaurants	Swimming

Length of Stay

5.4 Days on Average

Travel Party Size

3.7 People

100% Traveled with Children

Daily Spending

$172 Per Person

Destination Analysts

Q1 2023
Visitor Summary
by Generation

THE MILLENNIAL VISITOR

Q1 2023

Results reflect visitors between the age of 22-40

Factors Important to Destination Decision

Factor	Percentage
Weather	31%
Attractions in the area	24%
Beaches that suit my tastes	19%
Friends or family in the area	17%
St. Pete Pier	10%
A specific attraction	9%

Domestic vs. International

United States Resident, 89%

International Visitor, 11%

POINT OF ORIGIN: TOP STATES

State	Percentage
Florida	54%
New York	5%
Pennsylvania	4%

Top Communities Visited

Community	Percentage
St. Petersburg	67%
Clearwater Beach	23%
Treasure Island	16%
Madeira Beach	16%
St. Pete Beach	14%

Top Activities

Activity	Percentage
Restaurants	62%
Beach	52%
Shopping	34%
Museums	30%

Length of Stay

3.2 Days on Average

Travel Party Size

2.0 People

12% Traveled with Children

Daily Spending

$137 Per Person

Destination Analysts

THE GEN X VISITOR
Q1 2023

Results reflect of visitors between the age of 41-57

Factors Important to Destination Decision

Factor	%
Weather	54%
Friends or family in the area	22%
Attractions in the area	19%
Beaches that suit my tastes	14%
A specific attraction	9%
Scenic beauty	8%

Domestic vs. International

United States Resident, 87%

International Visitor, 13%

POINT OF ORIGIN: TOP STATES

State	%
Florida	29%
Michigan	8%
Ohio	6%

Top Communities Visited

Community	%
St. Petersburg	50%
Madeira Beach	31%
Clearwater Beach	30%
Treasure Island	25%
St. Pete Beach	24%

Top Activities

Beach	Restaurants	Shopping	Museums
62%	46%	39%	30%

Length of Stay

5.2 Days on Average

Travel Party Size

2.3 People

20% Traveled with Children

Daily Spending

$205 Per Person

THE BABY BOOMER VISITOR

Q1 2023

Results reflect of visitors between the age of 58-76

Factors Important to Destination Decision

Weather	40%
Attractions in the area	32%
Friends or family in the area	22%
Beaches that suit my tastes	17%
Arts & cultural offerings	13%
St. Pete Pier	9%

Domestic vs. International

United States Resident, 89%

International Visitor, 11%

POINT OF ORIGIN: TOP STATES

Florida	29%
New York	7%
Michigan	6%
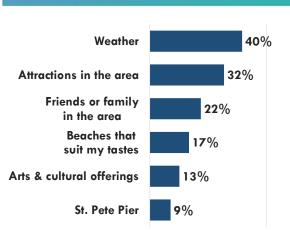
Top Communities Visited

St. Petersburg	72%
Clearwater Beach	22%
St. Pete Beach	19%
Madeira Beach	19%
Treasure Island	15%

Top Activities

Restaurants	Museums	Beach	Shopping
64%	49%	45%	42%

Length of Stay

4.2 Days on Average

Travel Party Size

2.2 **People**

4% Traveled with Children

Daily Spending

$136 **Per Person**
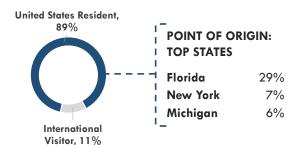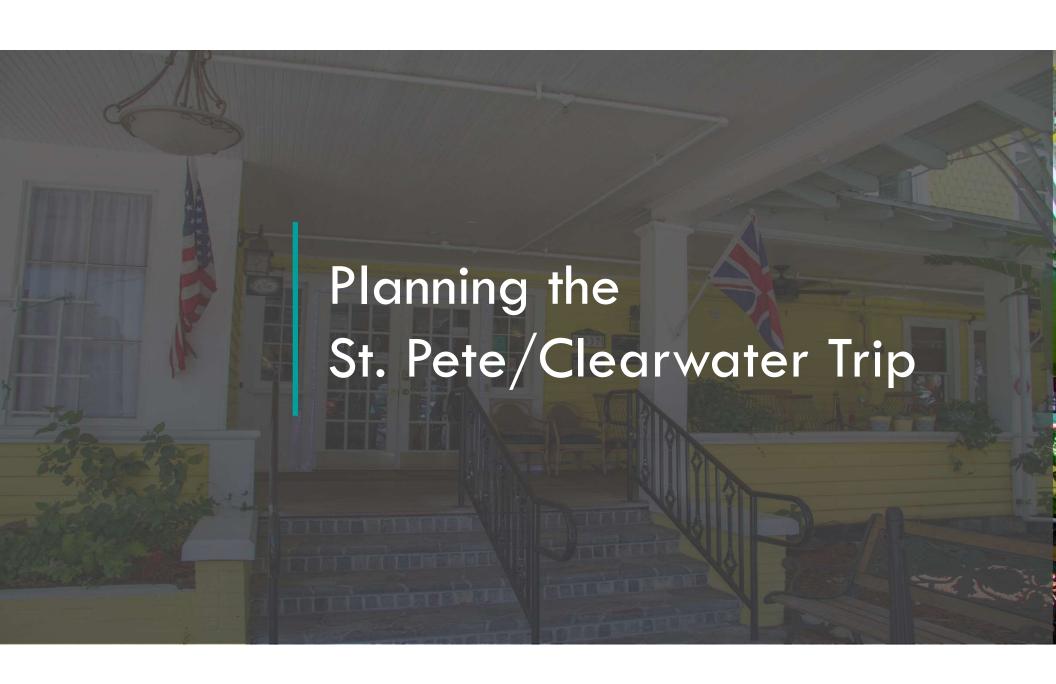
Destination Analysts

Planning the
St. Pete/Clearwater Trip

WHEN THE DECISION TO VISIT WAS MADE

The average St. Pete/Clearwater visitor decided to visit approximately 9 weeks (62.4 days) prior to their actual arrival date, which is up from about 6 weeks (39.3 days) in Q1 2022. Hotel guests made the decision to visit 76.6 days in advance compared to 57.2 days in Q1 2022. Similarly, VFRs decided 76.2 days in advance (up from 39.7 days) and day trippers made the decision 46.3 days in advance (up from Q1 2022 with 18.9 days).

Figure 1: Average Time Between Decision to Visit and Arrival

62.4 Days in Advance

Detail by Type of Visitor

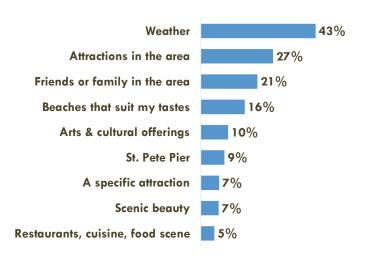|	Hotel	VFR	Day Trip
Base Size:	341	284	494
Average Days between Decision and Visit	76.6	76.2	46.3

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. 1,471 responses.

IMPORTANT FACTORS IN DESTINATION DECISION

In Q1 2023, weather (43%), area attractions (27%) and friends or family in the area (21%) were the top three factors motivating visitation to the destination.

Figure 2: Important to Decision to Visit

Factor	Percentage
Weather	43%
Attractions in the area	27%
Friends or family in the area	21%
Beaches that suit my tastes	16%
Arts & cultural offerings	10%
St. Pete Pier	9%
A specific attraction	7%
Scenic beauty	7%
Restaurants, cuisine, food scene	5%

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size:	303	283	482
Weather	61%	56%	31%
Attractions in the area	24%	14%	30%
Friends or family in the area	15%	73%	17%
Beaches that suit my tastes	30%	11%	10%
Arts & cultural offerings	7%	8%	11%
St. Pete Pier	6%	4%	11%
A specific attraction	5%	3%	8%
Scenic beauty	8%	6%	6%
Restaurants, cuisine, food scene	5%	4%	5%

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. 1,419 responses.

IMPORTANT FACTORS IN DESTINATION DECISION

Hotel guests and VFRs said that weather, Pinellas County beaches, and scenic beauty were the most important factors in deciding to visit St. Pete/Clearwater.

Day trip visitors were the most likely to say that attractions in the area, arts & cultural offerings, and/or the St. Pete Pier were important to their decision to visit the destination.

	Total	Hotel	VFR	Day Trip
Base Size	1,419	303	283	482
Weather	43%	**61%**	**56%**	31%
Attractions in the area	27%	24%	14%	**30%**
Friends or family in the area	21%	15%	73%	17%
Beaches that suit my tastes	16%	**30%**	**11%**	10%
Arts & cultural offerings	10%	7%	8%	**11%**
St. Pete Pier	9%	6%	4%	**11%**
A specific attraction	1%	5%	3%	8%
Scenic beauty	1%	**8%**	6%	6%
Restaurants, cuisine, food scene	5%	5%	4%	5%
Recommendation from people I know	5%	5%	2%	4%
Special event(s) and/or festival(s)	5%	5%	1%	5%
The area's unique culture	4%	4%	5%	4%
Shopping opportunities	4%	2%	2%	4%
Advertisements for the area	3%	3%	1%	4%
Fishing opportunities	3%	2%	2%	3%
Easy to get to	3%	5%	<1%	2%
The St. Pete/Clearwater area is family- friendly	2%	2%	3%	2%
Good deal on airfare	2%	3%	2%	2%
Overall ambiance & atmosphere	2%	2%	3%	1%
Sports or sporting events	1%	5%	<1%	<1%
Golf	1%	1%	1%	1%
Articles, features, reviews, etc. about the area	1%	<1%	1%	1%
Lifelong desire to visit	1%	1%	1%	<1%
Appealing hotels/resorts and other lodging options	1%	2%	<1%	<1%
Good hotel rate	1%	1%	<1%	<1%
Outdoor recreational opportunities	<1%	<1%	<1%	<1%
The St. Pete/Clearwater area is romantic	<1%	<1%	1%	<1%
Breweries/Distilleries/Craft beer scene	<1%	<1%	<1%	<1%

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. 1,419 responses.

TRAVEL PLANNING RESOURCES USED

In Q1 2023, respondents cited review websites, opinions of friends or relatives, and online travel agencies as the most utilized travel planning resources. Pre-arrival usage of the official Visit St. Pete/Clearwater website saw a decrease from 19% in Q1 2022 to only 1% in Q1 2023.

Figure 3: Resources Used before Arrival and While In Market

	Used Pre-Arrival	Used In-Market
Review websites (TripAdvisor, etc.)	**49%**	**49%**
Opinions of friends or relatives	34%	24%
Online travel agencies (Expedia, etc.)	23%	1%
Social Media content	17%	14%
Newspaper travel section	2%	1%
www.VisitStPeteClearwater.com	**1%**	**3%**
Travel agency (traditional, offline)	1%	<1%
Travel guides, brochures	1%	7%
Lifestyle or travel magazines	1%	1%
YouTube or other online videos	1%	<1%
Television programming	<1%	<1%
Gulf to Bay St Pete/Clearwater Magazine	**<1%**	**<1%**
Radio programming	<1%	<1%

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. 1,471 responses.
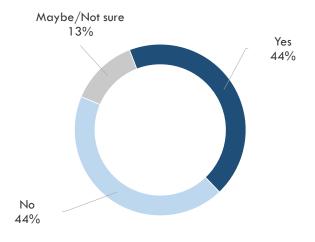
Detail by Traveler Segment

	Hotel		VFR		Day Trip	
Base Size	341		284		494	
	Pre-Arrival	In-Market	Pre-Arrival	In-Market	Pre-Arrival	In-Market
Review websites (TripAdvisor, etc.)	54%	59%	30%	40%	40%	44%
Opinions of friends or relatives	18%	14%	67%	60%	37%	23%
Online travel agencies	30%	3%	19%	1%	21%	1%
Social Media content	19%	21%	9%	9%	17%	12%
Newspaper travel section	1%	2%	1%	1%	3%	1%
www.VisitStPeteClearwater.com	**2%**	**4%**	**1%**	**3%**	**1%**	**1%**
Travel agency	2%	1%	<1%	<1%	0.8%	<1%
Travel guides, brochures	2%	13%	1%	6%	1%	4%
Lifestyle or travel magazines	1%	1%	1%	1%	1%	1%
YouTube or other online videos	1%	1%	<1%	1%	1%	<1%
Television programming	<1%	<1%	<1%	<1%	1%	<1%
Gulf to Bay St Pete/Clearwater Magazine	**1%**	**1%**	**<1%**	**<1%**	**<1%**	**<1%**
Radio programming	<1%	<1%	<1%	<1%	<1%	<1%

EARNED & PAID MEDIA RECALL

Over four-in-ten (44%) of responding visitors in Q1 2023 recalled seeing, hearing or reading earned media or advertisements/promotions for St. Pete/Clearwater in the past six months (up from 41% in Q1 2022).

Figure 4: Media Recall

Maybe/Not sure
13%

Yes
44%

No
44%

Detail by Traveler Segment

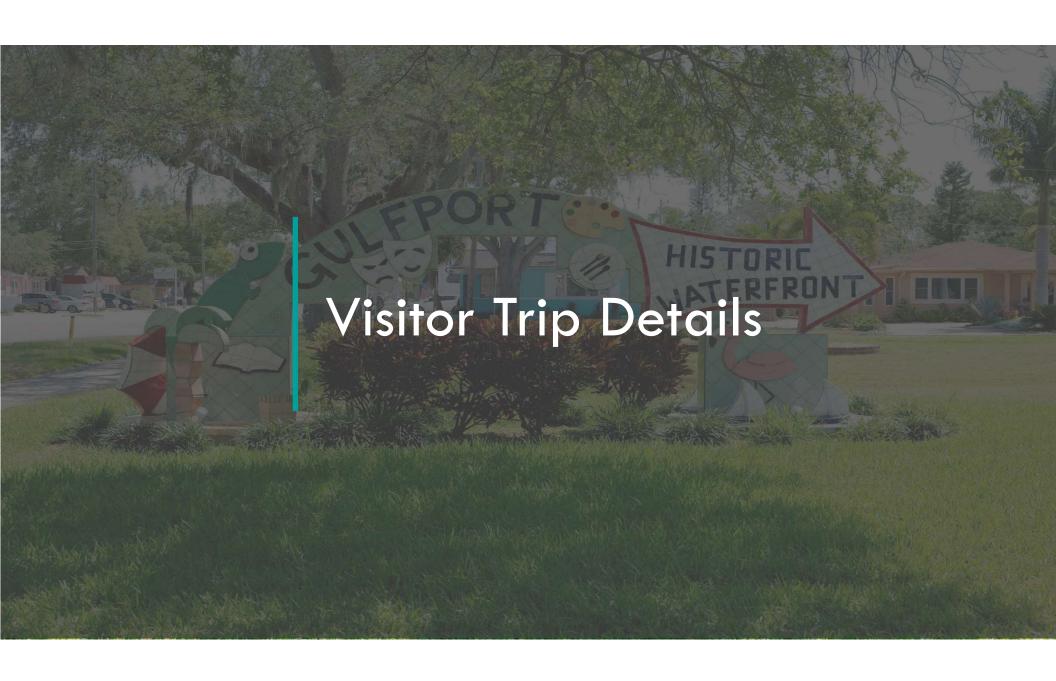|	Hotel	VFR	Day Trip
Base Size	337	280	483
Yes	**28%**	28%	**52%**
No	60%	56%	35%
Maybe/Not sure	12%	16%	13%

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 1,445responses.
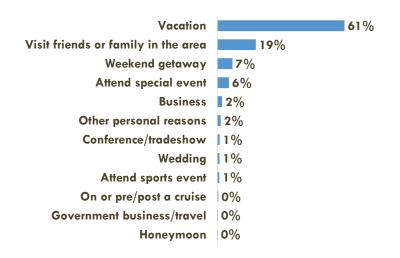
Visitor Trip Details

PRIMARY REASON FOR VISIT

Vacation was again the primary reason for a visit to the St. Pete/Clearwater area (61% in Q1 2023, up from 38% in Q1 2022).
Compared to 35 percent in Q1 2022, only 19 percent cited family and friends as the reason for their visit to Pinellas County in Q1 2023.

Figure 5: Primary Reason for Visit

Reason	Percent
Vacation	61%
Visit friends or family in the area	19%
Weekend getaway	7%
Attend special event	6%
Business	2%
Other personal reasons	2%
Conference/tradeshow	1%
Wedding	1%
Attend sports event	1%
On or pre/post a cruise	0%
Government business/travel	0%
Honeymoon	0%

Detail by Traveler Segment
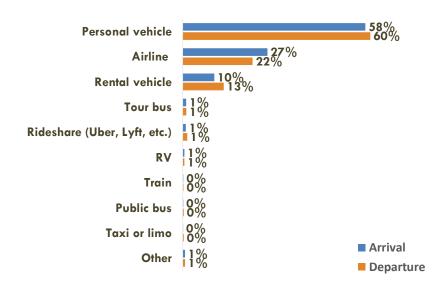
	Hotel	VFR	Day Trip
Base Size	339	283	494
Vacation	63%	**37%**	**58.7%**
Visit friends or family in the area	10%	55%	19%
Weekend getaway	5%	3%	9%
Attend special event	4%	2%	7%
Business	6%	<1%	2%
Other personal reasons	<1%	1%	2%
Conference/tradeshow	4%	<1%	1%
Wedding	2%	1%	1%
Attend sports event/tournament	3%	<1%	1%
On or pre/post a cruise	1%	1%	<1%
Government business/travel	1%	<1%	<1%
Honeymoon	<1%	<1%	<1%

Question: What is your primary reason for visiting the St. Pete/Clearwater Area? (Select one)
Base: All Respondents. 1,464 responses.

METHOD OF ARRIVAL & DEPARTURE

The most common method of arrival in Q1 2023 continue to be personal vehicle (58%). Day trippers (69%) were the most likely segment to arrive by personal vehicle, similar to Q1 2022 (70%). VFRs (55%) and hotel guests (49%) were the segments most likely to arrive by airline. For hotel guests, this is down from 62 percent in Q1 2022, but for VFRs it is up from 37 percent. 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

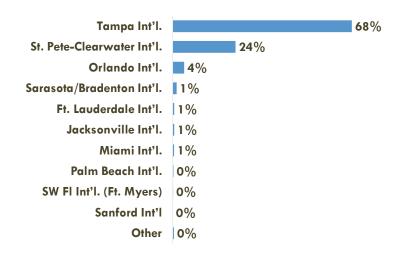|	Hotel		VFR		Day Trip	
Base Size	341		284		494	
	Arrival	Departure	Arrival	Departure	Arrival	Departure
Personal vehicle	33%	34%	**42%**	50%	**69%**	70%
Airline	**49%**	38%	**55%**	44%	16%	15%
Rental vehicle	13%	20%	3%	5%	11%	12%
Tour bus	1%	1%	<1%	<1%	2%	2%
Rideshare (Uber, Lyft, etc.)	4%	5%	<1%	<1%	<1%	<1%
RV	<1%	<1%	<1%	<1%	<1%	<1%
Train	<1%	<1%	<1%	<1%	<1%	<1%
Public bus	<1%	1%	<1%	<1%	<1%	<1%
Taxi or limo	1%	1%	<1%	<1%	<1%	<1%
Other	<1%	<1%	<1%	<1%	1%	1%

Question: How did you arrive in the St. Pete/Clearwater area and how will you leave? (Select all that apply) Base: All Respondents. 1,471 responses.

ARRIVAL AIRPORT

Air travelers continued to arrive in Pinellas County mainly via Tampa Int'l. (68%, up from 60% in Q1 2022). Only 24 percent of visitors (a slight decrease from 27% in Q1 2022) arriving by airplane flew into St. Pete-Clearwater International, and 4 percent of visitors (down from 10% in Q1 2022) flew into Orlando International.

Figure 7: Arrival Airport

Airport	Percentage
Tampa Int'l.	68%
St. Pete-Clearwater Int'l.	24%
Orlando Int'l.	4%
Sarasota/Bradenton Int'l.	1%
Ft. Lauderdale Int'l.	1%
Jacksonville Int'l.	1%
Miami Int'l.	1%
Palm Beach Int'l.	0%
SW Fl Int'l. (Ft. Myers)	0%
Sanford Int'l	0%
Other	0%

Detail by Traveler Segment

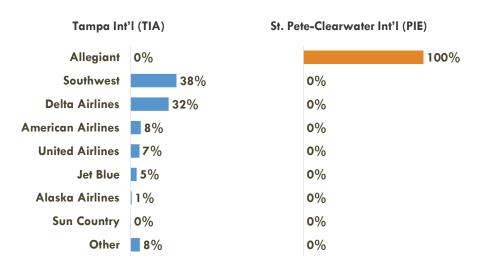|	Hotel	VFR	Day Trip
Base Size	160	149	84
Tampa Int'l.	**76%**	**74%**	**60%**
St. Pete-Clearwater Int'l	15%	**24%**	**30%**
Orlando Int'l.	6%	<1%	5%
Sarasota/Bradenton Int'l	0%	<1%	3%
Ft. Lauderdale Int'l.	0%	0%	1%
Jacksonville Int'l.	0%	0%	1%
Miami Int'l.	1%	0%	0%
Other	1%	0%	0%
Palm Beach Int'l.	0%	0%	0%
SW Fl Int'l. (Ft. Myers)	0%	0%	0%
Sanford Int'l	1%	1%	0%

Question: At which airport did you arrive into the area? (Select one) Base: All Respondents who arrived in the area by airplane. 534 responses.

ARRIVAL AIRLINE (BY AIRPORT)

All Pinellas County visitors who flew into St. Pete-Clearwater International in Q1 2023 arrived via Allegiant. Visitors using Tampa International Airport most commonly flew Southwest Airlines (38%), Delta Airlines (32%), American Airlines (8%) and United Airlines (7%).

Figure 8: Arrival Airline Airport

Tampa Int'l (TIA)

Airline	TIA
Allegiant	0%
Southwest	38%
Delta Airlines	32%
American Airlines	8%
United Airlines	7%
Jet Blue	5%
Alaska Airlines	1%
Sun Country	0%
Other	8%

St. Pete-Clearwater Int'l (PIE)

Airline	PIE
Allegiant	100%
Southwest	0%
Delta Airlines	0%
American Airlines	0%
United Airlines	0%
Jet Blue	0%
Alaska Airlines	0%
Sun Country	0%
Other	0%

Detail by Traveler Segment
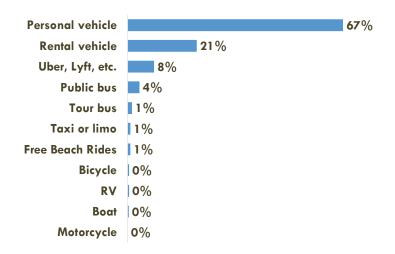
	Hotel		VFR		Day Trip	
Base Size	144		146		74	
	TIA	PIE	TIA	PIE	TIA	PIE
Allegiant	0%	100%	0%	100%	0%	100%
Southwest Airlines	39%	0%	43%	0%	31%	0%
Delta Airlines	29%	0%	26%	0%	39%	0%
American Airlines	10%	0%	5%	0%	7%	0%
United Airlines	10%	0%	10%	0%	5%	0%
Jet Blue	4%	0%	6%	0%	6%	0%
Alaska Airlines	2%	0%	0%	0%	0%	0%
Sun Country	1%	0%	0%	0%	0%	0%
Other	4%	0%	10%	0%	12%	0%

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. 494 responses.

In-Market Transportation Used

Personal vehicles (67%) and rental vehicles (21%) continued to be the most common transportation within the St. Pete/Clearwater area. The percentage of visitors who used their personal vehicle as transportation is down from 74 percent in Q1 2022, while those who used a rental vehicle is slightly up from 20 percent in Q1 2022. VFRs and day trippers were again the most likely segments to use a personal vehicle (85% and 75%, respectively), while hotel guests were the most likely to rent a vehicle (41%).

Figure 9: Transportation Used In-Market

Mode	%
Personal vehicle	67%
Rental vehicle	21%
Uber, Lyft, etc.	8%
Public bus	4%
Tour bus	1%
Taxi or limo	1%
Free Beach Rides	1%
Bicycle	0%
RV	0%
Boat	0%
Motorcycle	0%

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	341	284	494
Personal vehicle	36%	**85%**	**75%**
Rental vehicle	**41%**	10%	16%
Uber, Lyft, etc.	21%	5%	5%
Public bus	5%	6%	3%
Tour bus	1%	0%	2%
Taxi or limo	2%	0%	1%
Free Beach Rides	0%	1%	1%
Bicycle	1%	0%	<1%
RV	0%	0%	0%
Boat	<1%	0%	<1%
Motorcycle	0%	0%	0%

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. 1,471 responses.

RENTAL VEHICLE PICK-UP LOCATION

Over half of respondents who rented a vehicle picked up their vehicle in Tampa (56%, down from 60% in Q1 2022). Only 10 percent picked up their rental in St. Pete/Clearwater, a significant decrease from 19 percent in Q1 2022.

Figure 10: Rental Vehicle Pick-Up City

City	%
Tampa	56%
Orlando	14%
Sarasota/Bradenton	12%
St. Petersburg/Clearwater area	10%
Ft. Myers	4%
Miami	3%
Fort Lauderdale	1%
Jacksonville	1%
West Palm Beach	0%
Outside of Florida	0%
Sanford	0%

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	139	30	83
Tampa	71%	69%	41%
Orlando	12%	6%	17%
Sarasota/Bradenton	1%	0%	24%
St. Petersburg/ Clearwater area	**10%**	**14%**	**6%**
Ft. Myers	1%	4%	6%
Miami	1%	4%	6%
Fort Lauderdale	1%	2%	2%
Jacksonville	0%	0%	1%
West Palm Beach	1%	0%	0%
Outside of Florida	0%	0%	0%
Sanford	0%	0%	0%

Question: In which city did you rent your rental vehicle? (Select one)
Base: Respondents who arrived in the area by rental car. 346 responses.

TRAVEL PARTY SIZE

On average, travel groups to Pinellas County were comprised of 2.2 people (unchanged from Q1 2022). In total, 10 percent of visitors traveled with children in Q1 2023, compared to 18 percent in Q1 2022.

Figure 11: Travel Party Size
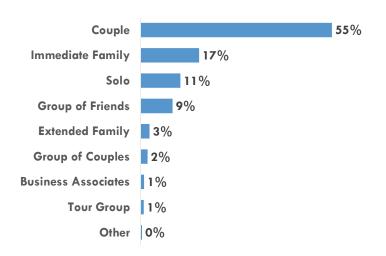
	Total	Hotel	VFR	Day Trip
Base Size	1,467	339	284	494
Male adults (18 yrs. +)	0.9	1.0	0.8	0.9
Female adults (18 yrs. +)	1.1	1.1	1.0	1.2
Male children (0 to 17 yrs.)	0.1	0.1	0.0	0.1
Female children (0 to 17 yrs.)	0.1	0.1	0.0	0.1
Average Travel Party Size	**2.2**	**2.3**	**1.8**	**2.2**
Percent with children in Party	10%	13%	5%	10%

Question: How many people of each type are in your immediate travel party, including yourself?
Base: All Respondents. 1,467 responses.

TRAVEL PARTY COMPOSITION

Most Pinellas County visitors traveled as a couple (55%, up slightly from 52% in Q1 2022). Additionally, 17 percent said they were traveling with immediate family (down from 25% in Q1 2022), while 12 percent were traveling solo (down from 20% in Q1 2022). Hotel guests and day trippers were most likely to travel as a couple (59% and 54%, respectively), and VFRs continue to be the most likely to travel solo (36%, up from 27% in Q1 2022).

Figure 12: Travel Party Composition

Couple	55%
Immediate Family	17%
Solo	11%
Group of Friends	9%
Extended Family	3%
Group of Couples	2%
Business Associates	1%
Tour Group	1%
Other	0%

Detail by Traveler Segment
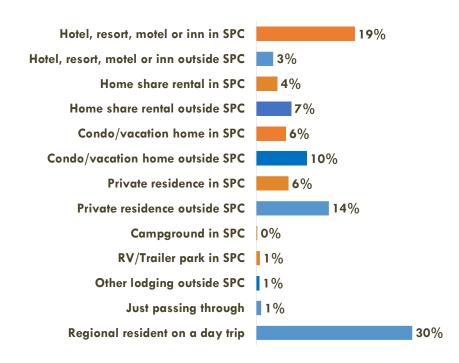
	Hotel	VFR	Day Trip
Base Size	341	284	494
Couple	**59%**	45%	**54%**
Immediate Family	18%	15%	18%
Solo	8%	**36%**	11%
Group of Friends	7%	4%	11%
Extended Family	3%	2%	2%
Group of Couples	1%	0%	2%
Business Associates	3%	0%	1%
Tour Group	1%	0%	1%
Other	1%	0%	<1%

Question: Which best describes your travel group on this trip? Are you…? (Select all that apply)
Base: All Respondents. 1,471 responses.

Lodging Type

Similar to Q1 2022, about 30 percent of overnight visitors to St. Pete/Clearwater stayed in paid accommodations such as a hotel, resort, motel or inn (19%), home share rental (4%), or in a condo/vacation home (6%). Additionally, 6% percent stayed in a private residence of local friends or family, down from 16 percent in Q1 2022.

Figure 13: Type of Lodging

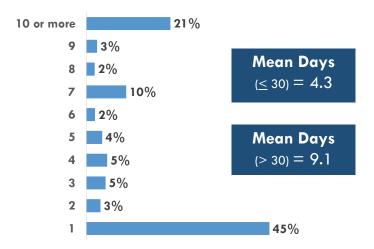| Category	Percent
Hotel, resort, motel or inn in SPC	19%
Hotel, resort, motel or inn outside SPC	3%
Home share rental in SPC	4%
Home share rental outside SPC	7%
Condo/vacation home in SPC	6%
Condo/vacation home outside SPC	10%
Private residence in SPC	6%
Private residence outside SPC	14%
Campground in SPC	0%
RV/Trailer park in SPC	1%
Other lodging outside SPC	1%
Just passing through	1%
Regional resident on a day trip	30%

Question: Where are you staying overnight on this trip to the St. Pete/Clearwater area? (Select one) Base: All Respondents. 1,471 responses.

DAYS SPENT IN ST. PETE/CLEARWATER

Among those staying for less than 30 days, the **average visitor stayed for 4.3 days in Pinellas County.** VFRs continued to report the longest length of stay averaging 7.8 days, followed by hotel guests with 5.0 days (down slightly from 5.2 days in Q1 2022). Among those staying for more than 30 days, the average length of stay was 9.1 days (up from 5.4 days in Q1 2022).

Figure 14: Days in Market

Days	%
10 or more	21%
9	3%
8	2%
7	10%
6	2%
5	4%
4	5%
3	5%
2	3%
1	45%

Mean Days
(≤ 30) = 4.3

Mean Days
(> 30) = 9.1

Detail by Traveler Segment

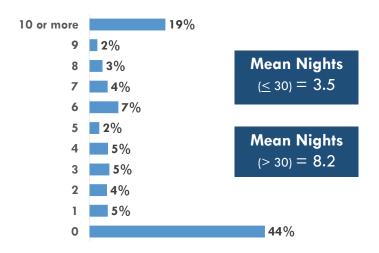|	Hotel	VFR	Day Trip
Base Size	341	284	494
10 or more	11%	40%	15%
9	2%	1%	3%
8	2%	3%	2%
7	18%	18%	5%
6	5%	8%	<1%
5	11%	6%	2%
4	16%	10%	2%
3	15%	11%	2%
2	14%	3%	1%
1	6%	1%	68%
Mean Days (<30)	**5.0**	**7.8**	**3.3**
Mean Days (>30)	**6.5**	**16.7**	**6.0**

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. 1,471 responses.

NIGHTS SPENT IN ST. PETE/CLEARWATER

The average visitor spent 3.5 nights in Pinellas County in Q1 2023 (up from 2.8 nights in Q1 2022), and 28 percent (up from 14% in Q1 2022) spent a week or more in the destination. VFRs continued to average the longest stays, with 49 percent (up from 24% in Q1 2022) staying 7 or more nights.

Figure 15: Nights in Market

Mean Nights
(≤ 30) = 3.5

Mean Nights
(> 30) = 8.2

Detail by Traveler Segment

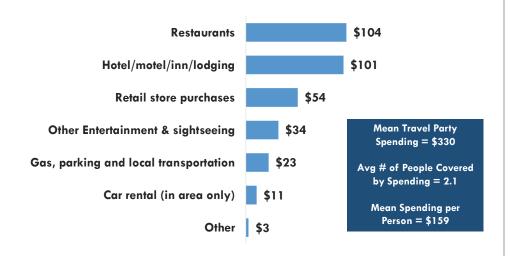|	Hotel	VFR	Day Trip
Base Size	341	284	494
10 or more	8%	37%	--
9	2%	3%	--
8	3%	1%	--
7	8%	8%	--
6	13%	16%	--
5	5%	7%	--
4	15%	6%	--
3	14%	11%	--
2	15%	8%	--
1	11%	1%	--
0	5%	2%	100%
Mean Nights (<30)	**4.3**	**7.2**	**--**
Mean Nights (>30)	**5.8**	**16.3**	**--**

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. 1,471 responses.

DAILY SPEND IN-MARKET

In Q1 2023, St. Pete/Clearwater visitors spent an average of $330 per travel party (up from $267 in Q1 2022), with the average visitor representing $159 in daily spending. Hotel guests reported the highest spending, averaging $574 per travel party (up from $486 in Q1 2022), with $290 spent per day on accommodations (up from $247 in Q1 2022).

Figure 16: Per Day Travel Party Spending

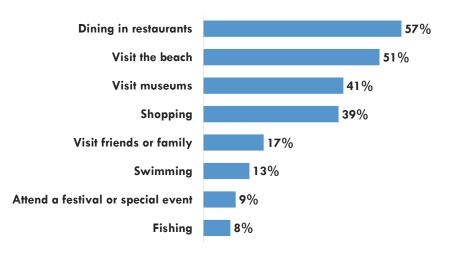|	
Restaurants	$104
Hotel/motel/inn/lodging	$101
Retail store purchases	$54
Other Entertainment & sightseeing	$34
Gas, parking and local transportation	$23
Car rental (in area only)	$11
Other	$3

Mean Travel Party Spending = $330

Avg # of People Covered by Spending = 2.1

Mean Spending per Person = $159

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	338	276	480
Restaurants	$1285	$80	$103
Hotel/motel/inn/lodging	$2907	$11	$46
Retail store purchases	$63	$46	$53
Other Entertainment & sightseeing	$358	$25	$36
Gas, parking and local transportation	$23	$10	$26
Car rental (in area only)	$29	$8	$5
Other	$7	$2	$2
Mean Spending per Travel Party	**$574**	**$183**	**$271**
# of People Covered by Spending	2.1	1.7	2.1
Mean Spending per Person	**$271**	**$110**	**$129**

Question: PER DAY, approximately how much will you spend on each of the following while in the St. Pete/Clearwater area? Base: All Respondents. 1,440 responses.

TRIP ACTIVITIES

The top activities as part of a St. Pete/Clearwater trip continue to be dining in restaurants (57%) and going to the beach (51%), followed by visiting museums (41%) and shopping (39%).

Figure 17: Trip Activities

Activity	%
Dining in restaurants	57%
Visit the beach	51%
Visit museums	41%
Shopping	39%
Visit friends or family	17%
Swimming	13%
Attend a festival or special event	9%
Fishing	8%

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	341	284	494
Dining in restaurants	72%	66%	50%
Visit the beach	65%	70%	41%
Visit museums	43%	42%	40%
Shopping	48%	48%	37%
Visit friends or family	9%	57%	16%
Swimming	17%	17%	9%
Attend a festival or special event	9%	9%	9%
Fishing	7%	7%	7%

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. 1,471 responses.

TRIP ACTIVITIES

Hotel guests and VFRs were the likeliest to have dined in a restaurant (72% and 66% respectively), gone shopping (48% each) and swimming (17% each).

VFRs were the likeliest segment to have gone to the beach (70%).
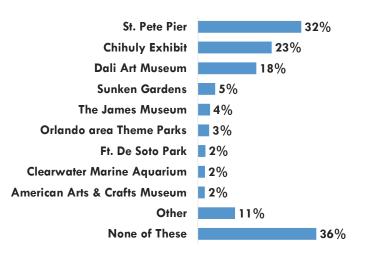
	Total	Hotel	VFR	Day Trip
Base Size	1,471	341	284	494
Dining in restaurants	57%	**72%**	**66%**	50%
Visit the beach	51%	65%	**70%**	41%
Visit museums	41%	43%	42%	40%
Shopping	39%	**48%**	**48%**	32%
Visit friends or family	18%	9%	57%	16%
Swimming	13%	**17%**	**17%**	9%
Attend a festival or special event	9%	9%	9%	9%
Fishing	8%	7%	7%	7%
Bars/Nightlife	6%	13%	9%	3%
Jet skiing	5%	5%	2%	6%
Golf	4%	4%	6%	3%
Other boating	4%	4%	7%	1%
Biking	3%	2%	6%	2%
Shelling	2%	1%	3%	2%
Attend or participate in a sporting event	2%	5%	3%	1%
Sailing	2%	<1%	2%	2%
Photography	1%	1%	2%	1%
Take a dining cruise	1%	1%	3%	1%
Guided tour	1%	2%	2%	1%
Visit breweries and/or distilleries	1%	1%	1%	<1%
Kayaking/Canoeing	1%	1%	1%	<1%
Bird watching	1%	<1%	2%	<1%
Baseball Spring Training	1%	1%	<1%	<1%
Parasailing	<1%	<1%	<1%	<1%
Paddle boarding	<1%	<1%	<1%	<1%

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. 1,471 responses.

ATTRACTIONS VISITED

The top three attractions for visitors were the St. Pete Pier (32%), the Chihuly Exhibit (23%), and the Dali Museum (18%). VFRs were the most likely to have visited the St. Pete Pier (42%), The James Museum (11%), and Ft. De Soto Park (8%), while hotel guests were the most likely to have visited the Sunken Gardens (9%) and the Clearwater Marine Aquarium (6%).

Figure 18: Attractions Visited

Attraction	Percentage
St. Pete Pier	32%
Chihuly Exhibit	23%
Dali Art Museum	18%
Sunken Gardens	5%
The James Museum	4%
Orlando area Theme Parks	3%
Ft. De Soto Park	2%
Clearwater Marine Aquarium	2%
American Arts & Crafts Museum	2%
Other	11%
None of These	36%

Detail by Traveler Segment

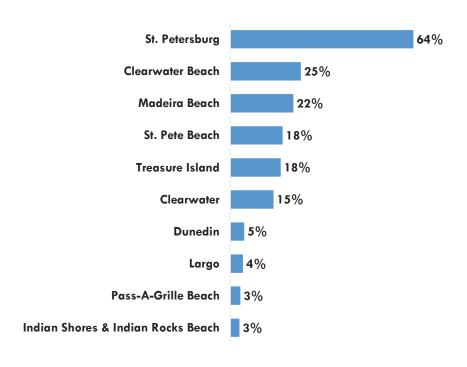|	Hotel	VFR	Day Trip
Base Size	341	284	494
St. Pete Pier	35%	**42%**	28%
Chihuly Exhibit	25%	25%	22%
Dali Art Museum	24%	22%	14%
Sunken Gardens	**9%**	8%	3%
The James Museum	5%	**11%**	3%
Orlando area Theme Parks	4%	2%	4%
Ft. Desoto Park	2%	**8%**	1%
Clearwater Marine Aquarium	**6%**	<1%	1%
American Arts & Crafts Museum	4%	4%	1%
Other	12%	14%	10%
None of These	35%	31%	38%

Question: Which of these attractions did you (or will you) visit while on this trip? (Select all that apply) Base: All Respondents. 1,471 responses.

COMMUNITIES VISITED

Most commonly, visitors frequented St. Petersburg (64%, up from 57% in Q1 2022), Clearwater Beach (25%, down from 41% in Q1 2022), Madeira Beach (22%, down from 44% in Q1 2022), St. Pete Beach (18%, down from 21% in Q1 2022), Treasure Island (18%, down from 26% in Q1 2022), and/or Clearwater (15%, down from 22% in Q1 2022).

Figure 19: Top Communities Visited

Community	Percentage
St. Petersburg	64%
Clearwater Beach	25%
Madeira Beach	22%
St. Pete Beach	18%
Treasure Island	18%
Clearwater	15%
Dunedin	5%
Largo	4%
Pass-A-Grille Beach	3%
Indian Shores & Indian Rocks Beach	3%

Question: Which of the following communities in the St. Pete/Clearwater area did you visit? (Show list. Select all that apply) Base: All Respondents. 1,471 responses.

COMMUNITIES VISITED

VFRs were the most likely to have visited St. Petersburg (74%) and most other Pinellas County communities. Hotel guests were the most likely to have visited Clearwater Beach (38%), while Downtown St. Petersburg was the area day trippers visited most in Q1 2023.

|	Total	Hotel	VFR	Day Trip
Base Size	1,471	341	284	494
St. Petersburg	64%	61%	**74%**	**64%**
Clearwater Beach	25%	**38%**	32%	18%
Madeira Beach	22%	17%	24%	21%
St. Pete Beach	18%	25%	32%	12%
Treasure Island	18%	15%	19%	17%
Clearwater	15%	21%	19%	13%
Dunedin	5%	7%	11%	2%
Largo	4%	2%	8%	4%
Pass-A-Grille Beach	3%	4%	10%	1%
Indian Shores & Indian Rocks Beach	3%	2%	15%	1%
Tarpon Springs	3%	3%	4%	2%
Gulfport	2%	2%	7%	1%
Seminole	1%	1%	3%	1%
Pinellas Park	1%	<1%	4%	1%
North Redington Beach/Redington Shores	1%	1%	3%	1%
Safety Harbor	1%	<1%	1%	<1%
Palm Harbor	1%	<1%	2%	<1%
Tierra Verde	1%	2%	<1%	<1%
Oldsmar	<1%	<1%	<1%	<1%
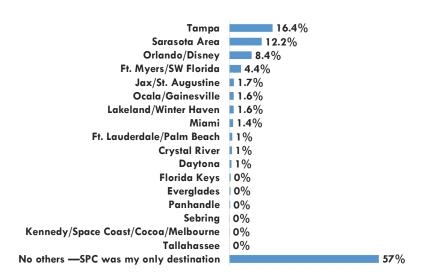
Question: Which of the following communities in the St. Pete/Clearwater area did you visit? (Show list. Select all that apply)

Base: All Respondents. 1,471 responses.

OTHER DESTINATIONS VISITED

For over half of all visitors, St. Pete/Clearwater was the only destination visited during their trip to the area in Q1 2023 (57%). Visitors were most likely to have visited Tampa (16%, down from 33% in Q1 2022), the Sarasota area (12%), and/or Orlando/Disney (8%).

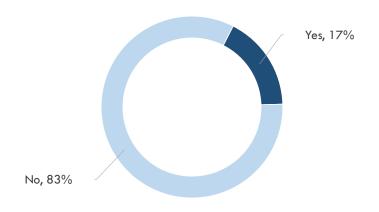**Figure 20: Other Destinations Visited on St. Pete/Clearwater Trip**

Destination	%
Tampa	16.4%
Sarasota Area	12.2%
Orlando/Disney	8.4%
Ft. Myers/SW Florida	4.4%
Jax/St. Augustine	1.7%
Ocala/Gainesville	1.6%
Lakeland/Winter Haven	1.6%
Miami	1.4%
Ft. Lauderdale/Palm Beach	1%
Crystal River	1%
Daytona	1%
Florida Keys	0%
Everglades	0%
Panhandle	0%
Sebring	0%
Kennedy/Space Coast/Cocoa/Melbourne	0%
Tallahassee	0%
No others —SPC was my only destination	57%

Question: Which of these other destinations did you visit while on this trip? (Select all that apply) Base: All Respondents. 1,471 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	341	284	494
Tampa	15%	15%	17%
Sarasota Area	10%	4%	14%
Orlando/Disney	7%	6%	9%
Ft. Myers/SW Florida	4%	2%	5%
Jax/St. Augustine	1%	2%	2%
Ocala/Gainesville	2%	1%	2%
Lakeland/Winter Haven	2%	<1%	2%
Miami	3%	1%	1%
Ft. Lauderdale/Palm Beach	3%	1%	1%
Crystal River	1%	1%	1%
Daytona	1%	<1%	1%
Florida Keys	1%	3%	<1%
Everglades	<1%	1%	<1%
Panhandle	1%	1%	<1%
Sebring	<1%	<1%	<1%
Kennedy/Space Coast/Cocoa/Melbourne	<1%	<1%	<1%
Tallahassee	<1%	<1%	<1%
No others	62%	69%	53%

FIRST-TIME FLORIDA VISITOR

In Q1 2023, 17% of visitors (up from 4% in Q1 2022) were in the State of Florida for the first time. Day trippers were the most likely to be on a first-time trip to Florida (18%), followed by VFRs (17%) and hotel guests (14%).

Figure 21: First-Time Visitors to Florida

Yes, 17%

No, 83%

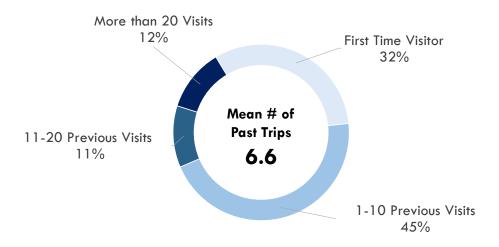**Detail by Traveler Segment**

	Hotel	VFR	Day Trip
Base Size	323	268	462
Yes	14%	17%	18%
No	86%	83%	82%

Question: Is this your first visit to Florida? Base: All Respondents 1,385 responses.

PREVIOUS VISITS TO ST. PETE/CLEARWATER

St. Pete/Clearwater had almost one-third of visitors (32%) who were in Pinellas County for the first time (up from 19% in Q1 2022).
Among those who have visited the destination, they have taken 6.6 previous trips to the area (a decrease from 13.2 trips in Q1 2022).
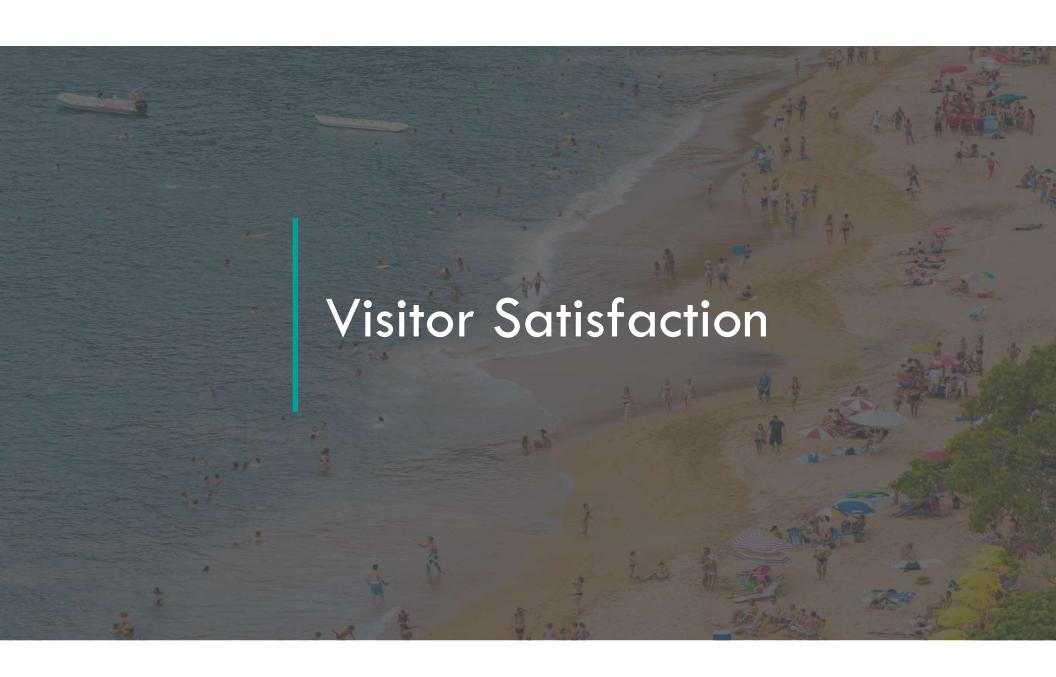
Figure 22: Previous Visitation to the St. Pete/Clearwater Area

More than 20 Visits 12%
First Time Visitor 32%
11-20 Previous Visits 11%
1-10 Previous Visits 45%
Mean # of Past Trips **6.6**

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	301	241	396
First-time Visitors	42%	27%	30%
1-10 Previous Visits	48%	52%	42%
11-20 Previous Visits	6%	13%	13%
More than 20 Previous Visits	4%	9%	15%
Mean	3.5	6.2	7.8
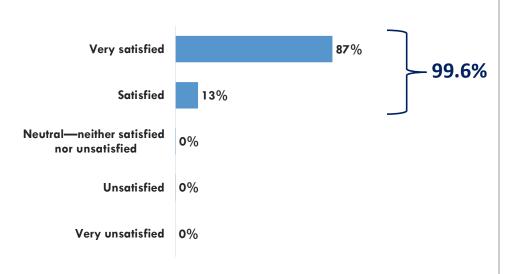
Question: Prior to this visit, how many times have you been to the St. Pete/Clearwater area?
Base: All Respondents. 1,260 responses.

Visitor Satisfaction

OVERALL SATISFACTION

In Q1 2023, St. Pete/Clearwater visitors were again extremely satisfied with their experience in the destination (99.6%, compared to 99.8% in Q1 2022).

Figure 26: Overall Satisfaction

Detail by Traveler Segment
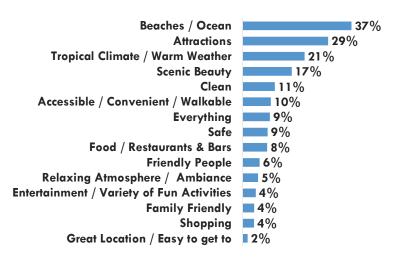
	Hotel	VFR	Day Trip
Base Size	337	281	482
Very satisfied	90%	88%	86%
Satisfied	9%	12%	14%
Neutral—neither satisfied nor unsatisfied	1%	0%	<1%
Unsatisfied	<1%	0%	<1%
Very unsatisfied	0%	0%	0%

Question: How satisfied are you with your experience in the St. Pete/Clearwater area on this trip? (Select one) Base: All Respondents. 1,446 responses.

MOST LIKED ASPECTS OF ST. PETE/CLEARWATER

St. Pete/Clearwater beaches continued to be the most liked aspect of the area (37%), followed by attractions (29%), weather/climate (21%), and/or scenic beauty (17%).

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

Beaches / Ocean						37%
Attractions					29%	
Tropical Climate / Warm Weather				21%		
Scenic Beauty			17%			
Clean		11%				
Accessible / Convenient / Walkable		10%				
Everything		9%				
Safe		9%				
Food / Restaurants & Bars		8%				
Friendly People	6%					
Relaxing Atmosphere / Ambiance	5%					
Entertainment / Variety of Fun Activities	4%					
Family Friendly	4%					
Shopping	4%					
Great Location / Easy to get to	2%					

Detail by Traveler Segment

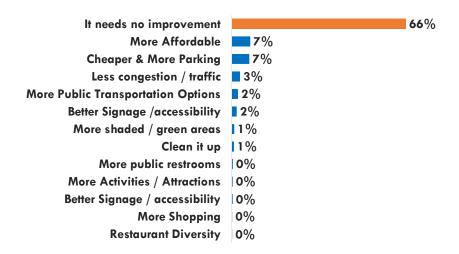|	Hotel	VFR	Day Trip
Base Size	341	284	494
Beaches / Ocean	**42%**	39%	35%
Attractions	24%	17%	**34%**
Tropical Climate / Warm Weather	**37**	36%	12%
Scenic Beauty	19%	20%	16%
Clean	11%	10%	11%
Accessible / Convenient / Walkable	13%	6%	9%
Everything	9%	**156%**	8%
Safe	6%	9%	9%
Food / Restaurants & Bars	6%	5%	9%
Friendly People	6%	**11%**	5%
Relaxing Atmosphere / Ambiance	7%	7%	4%
Entertainment / Variety of Fun Activities	4%	4%	5%
Family Friendly	3%	8%	4%
Shopping	4%	3%	4%
Great Location / Easy to get to	3%	2%	1%

Question: What do you like most about the St. Pete/Clearwater area?
Base: All Respondents. 1,471 responses.

ATTRACTIONS/ SERVICES DESIRED

When asked what services or additional attractions would enhance their experience in St. Pete/Clearwater, most visitors (66%) said that the destination needs no improvement. Of the specific suggestions provided, visitors wished the destination was more affordable (7%) and/or that there was cheaper/ more parking (7%).

Figure 24: Additional Attractions or Services (Unaided)

Category	Percentage
It needs no improvement	66%
More Affordable	7%
Cheaper & More Parking	7%
Less congestion / traffic	3%
More Public Transportation Options	2%
Better Signage /accessibility	2%
More shaded / green areas	1%
Clean it up	1%
More public restrooms	0%
More Activities / Attractions	0%
Better Signage / accessibility	0%
More Shopping	0%
Restaurant Diversity	0%

Detail by Traveler Segment

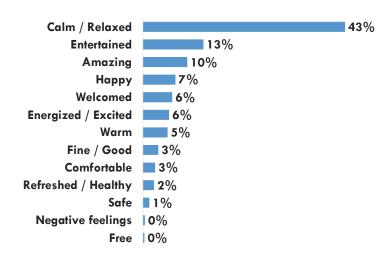|	Hotel	VFR	Day Trip
Base Size	341	284	494
It needs no improvement	64%	62%	68%
More Affordable	5%	4%	8%
Cheaper & More Parking	5%	6%	**7%**
Less congestion / traffic	4%	**6%**	3%
More Public Transportation Options	2%	2%	3%
Better Signage /accessibility	3%	2%	2%
More shaded / green areas	1%	1%	1%
Clean it up	1%	1%	1%
More public restrooms	1%	1%	<1%
More Activities / Attractions	1%	<1%	<1%
Better Signage / accessibility	1%	<1%	<1%
More Shopping	<1%	<1%	<1%
Restaurant Diversity	1%	<1%	<1%

Question: In your opinion, what services or additional attractions would most enhance your experience in the St. Pete/Clearwater Area? Base: All Respondents. 1,471 responses.

EMOTIONS WHILE IN ST. PETE/CLEARWATER

St. Pete/Clearwater visitors reported feeling calm/relaxed (43%, down from 61% in Q1 2022) and entertained (13%, down from 40% in Q1 2022).

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

Feeling	Percent
Calm / Relaxed	43%
Entertained	13%
Amazing	10%
Happy	7%
Welcomed	6%
Energized / Excited	6%
Warm	5%
Fine / Good	3%
Comfortable	3%
Refreshed / Healthy	2%
Safe	1%
Negative feelings	0%
Free	0%

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	341	284	494
Calm / Relaxed	**45%**	**45%**	**42%**
Entertained	6%	6%	17%
Amazing	11%	13%	8%
Happy	9%	6%	6%
Welcomed	4%	12%	6%
Energized / Excited	6%	6%	6%
Warm	5%	7%	5%
Fine / Good	3%	2%	4%
Comfortable	3%	4%	2%
Refreshed / Healthy	3%	1%	2%
Safe	1%	1%	1%
Negative feelings	<1%	<1%	1%
Free	<1%	1%	<1%

Question: What one word or phrase best describes how you feel in the St. Pete/Clearwater area? Base: All Respondents. 1,471 responses.

LIKELIHOOD TO RECOMMEND

Visitors said they were very likely to recommend St. Pete/Clearwater area as a travel destination to others (9.5/10 compared to 9.9/10 in Q1 2022).

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

9.5/10

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	340	281	489
10—Certain to Recommend	66%	68%	68%
9	23%	21%	21%
8	8%	10%	9%
7	2%	1%	1%
6	<1%	0%	<1%
5	<1%	0%	<1%
4	0%	<1%	<1%
3	0%	0%	0%
2	0%	0%	0%
1—Definitely WILL NOT Recommend	0%	0%	<1%
Mean Score	**9.5**	**9.5**	**9.5**

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. 1,458 responses.

LIKELIHOOD TO RETURN

Visitors also said they were very likely to return St. Pete/Clearwater in the future (9.6/10).

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

9.6/10

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	337	280	492
10—Certain to Return	73%	74%	74%
9	19%	17%	18%
8	5%	8%	7%
7	2%	1%	1%
6	<1%	0%	<1%
5	<1%	0%	<1%
4	0%	0%	<1%
3	0%	0%	0%
2	0%	0%	0%
1—Definitely WILL NOT Return	0%	0%	<1%
Mean Score	**9.6**	**9.6**	**9.6**

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."
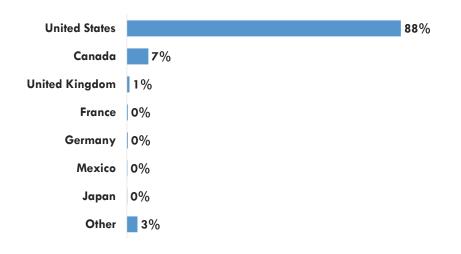Base: All Respondents. 1,457 responses.

Q1 2023
Point of Origin &
Demographic Profile

COUNTRY OF ORIGIN

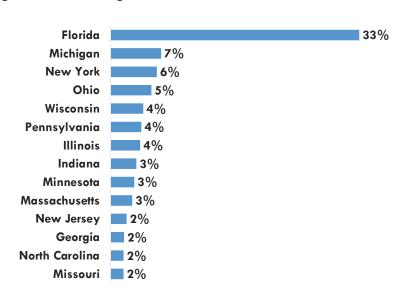**The St. Pete/Clearwater area saw an increase in international visitors in Q1 2023 (12%, up from 6% in Q1 2022).**

Figure 29: Country of Origin

Country	Percentage
United States	88%
Canada	7%
United Kingdom	1%
France	0%
Germany	0%
Mexico	0%
Japan	0%
Other	3%

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	330	275	475
United States	92%	88%	88%
Canada	4%	7%	7%
United Kingdom	2%	2%	<1%
France	1%	1%	<1%
Germany	0%	0%	<1%
Mexico	0%	0%	<1%
Japan	<1%	0%	0%
Other	2%	2%	4%

Question: In what country do you reside? Base: All Respondents. 1,421 responses.

TOP STATES OF ORIGIN

Most domestic visitors (67%) in Q1 2023 were out-of-state residents. Michigan (7%), New York (6%), Ohio (5%), Wisconsin (4%), Pennsylvania (4%), and Illinois (4%) contributed the most out-of-state visitors. Day trippers were the most likely to be Florida residents (46%), while 10% of hotel guests were from New York.
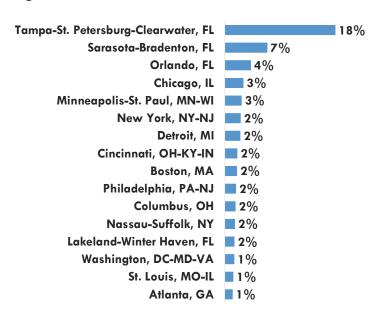
Figure 30: State of Origin

	Florida	33%
Michigan	7%
New York	6%
Ohio	5%
Wisconsin	4%
Pennsylvania	4%
Illinois	4%
Indiana	3%
Minnesota	3%
Massachusetts	3%
New Jersey	2%
Georgia	2%
North Carolina	2%
Missouri	2%

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	293	233	389
Florida	14%	6%	**46%**
Michigan	7%	5%	6%
New York	**10%**	8%	4%
Ohio	7%	7%	4%
Wisconsin	4%	4%	5%
Pennsylvania	5%	4%	3%
Illinois	5%	5%	3%
Indiana	3%	3%	3%
Minnesota	3%	5%	2%
Massachusetts	6%	3%	2%
New Jersey	2%	3%	2%
Georgia	2%	5%	1%
North Carolina	2%	4%	1%
Missouri	3%	2%	1%

Question: What is your zip/postal code? Base: Domestic respondents. 1,194 responses.

MSA of Origin

The top three Florida visitor markets in Q1 2023 were Tampa area (18%), Sarasota/Bradenton (7%), and Orlando (4%). The top out-of-state markets for Q1 2023 were Chicago, IL (3%), Minneapolis-St. Paul, MN-WI (3%), and New York, NY-NJ (3%).

Figure 31: MSA

MSA	Percentage
Tampa-St. Petersburg-Clearwater, FL	18%
Sarasota-Bradenton, FL	7%
Orlando, FL	4%
Chicago, IL	3%
Minneapolis-St. Paul, MN-WI	3%
New York, NY-NJ	2%
Detroit, MI	2%
Cincinnati, OH-KY-IN	2%
Boston, MA	2%
Philadelphia, PA-NJ	2%
Columbus, OH	2%
Nassau-Suffolk, NY	2%
Lakeland-Winter Haven, FL	2%
Washington, DC-MD-VA	1%
St. Louis, MO-IL	1%
Atlanta, GA	1%

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	258	192	343
Tampa-St. Petersburg-Clearwater, FL	2%	<1%	27%
Sarasota-Bradenton, FL	2%	<1%	10%
Orlando, FL	3%	<1%	5%
Chicago, IL	3%	5%	2%
Minneapolis-St. Paul, MN-WI	3%	6%	2%
New York, NY-NJ	3%	4%	2%
Detroit, MI	4%	5%	2%
Cincinnati, OH-KY-IN	2%	2%	2%
Boston, MA	4%	2%	1%
Philadelphia, PA-NJ	3%	3%	1%
Columbus, OH	2%	3%	1%
Nassau-Suffolk, NY	4%	1%	1%
Lakeland-Winter Haven, FL	1%	1%	2%
Washington, DC-MD-VA	2%	2%	1%
St. Louis, MO-IL	3%	1%	1%
Atlanta, GA	2%	3%	1%

Question: What is your zip/postal code? Base: Domestic respondents. 1,018 responses.

DEMOGRAPHICS

The demographic profile for all visitors in Q1 2023 are as follows:

Average Age

52 years old

Gender*

Female: 48%

Male: 52%

Household Income

$77,760

Marital Status

Single: 24%

Married/partnered: 68%

Children under 18: 8%

Ethnicity

Caucasian – 87%

Black/African-American – 5%

Latino / Hispanic – 2%

Orientation

Heterosexual – 91%

LGBTQ – 4%

Other – <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.

DEMOGRAPHICS BY VISITOR SEGMENT

The demographic profile by place of stay segments in Q1 2023 are as follows:

	Hotel	VFR	Day Trip
Female	47%	53%	48%
Male	53%	47%	51%
Mean Age	50.6	53.9	51.5
Single	19%	33%	26%
Married	75%	52%	66%
Has Children	11%	4%	8%
Annual Household Income	$90,084	$70,094	$74,755
Caucasian	91%	86%	85%
Black/African-American	4%	8%	5%
Latino / Hispanic	2%	3%	5%
Asian/Pacific Islander	2%	2%	2%
American Indian/Alaska Native	<1%	<1%	<1%
Other	<1%	<1%	1%
Heterosexual	92%	93%	90%
LGBTQ	4%	2%	4%