



Visit St. Pete/Clearwater

VISITOR PROFILE STUDY

Report of Findings
Q2 2023

Research prepared for Visit St. Pete/Clearwater by:

Future Partners



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RESEARCH OVERVIEW & METHODOLOGY

This report presents the quarterly interim findings of a comprehensive visitor profile development study conducted by Future Partners (formerly Destination Analysts) 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 April 2023 — June 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, 1,556 completed surveys from Pinellas County visitors were collected.

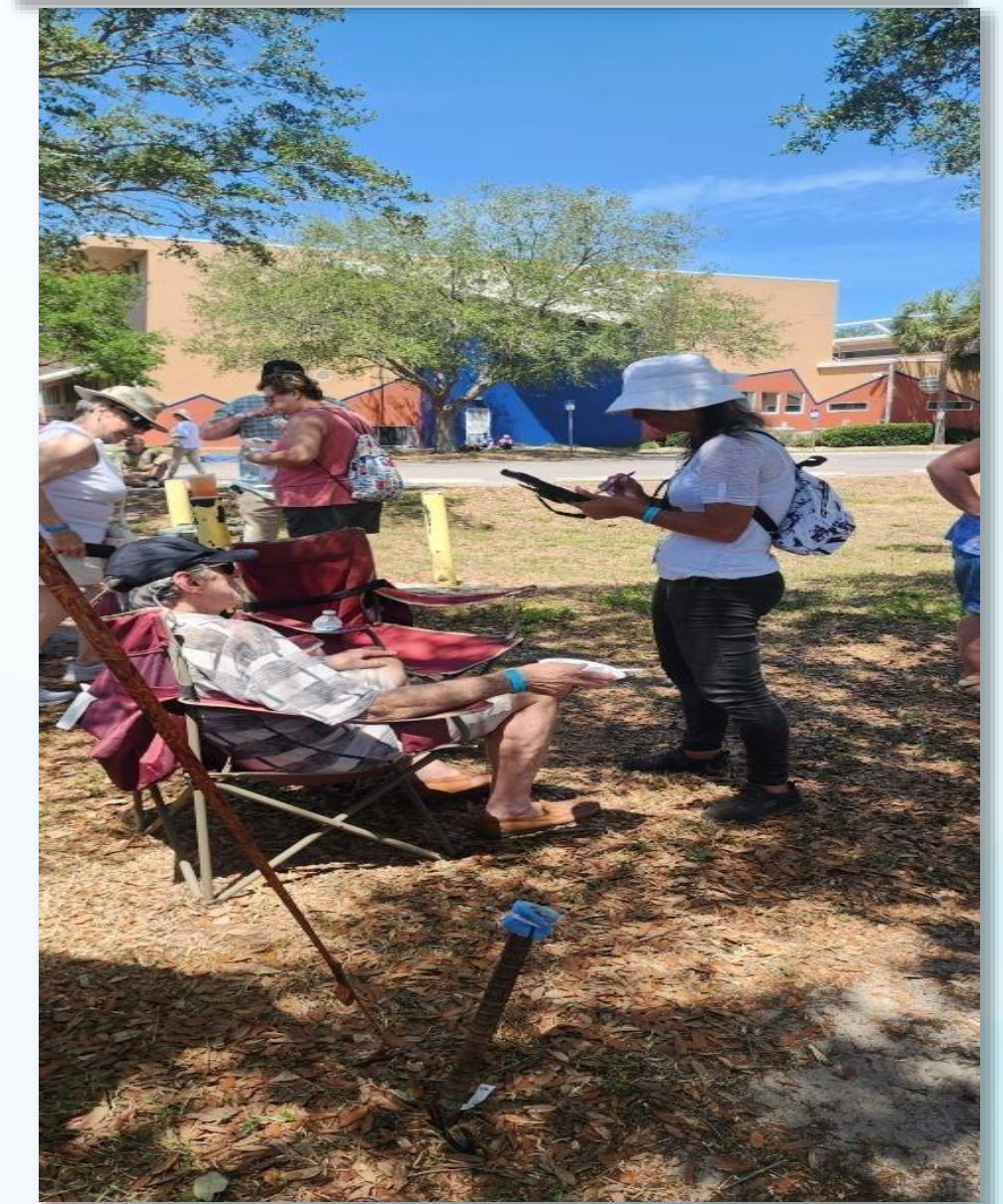
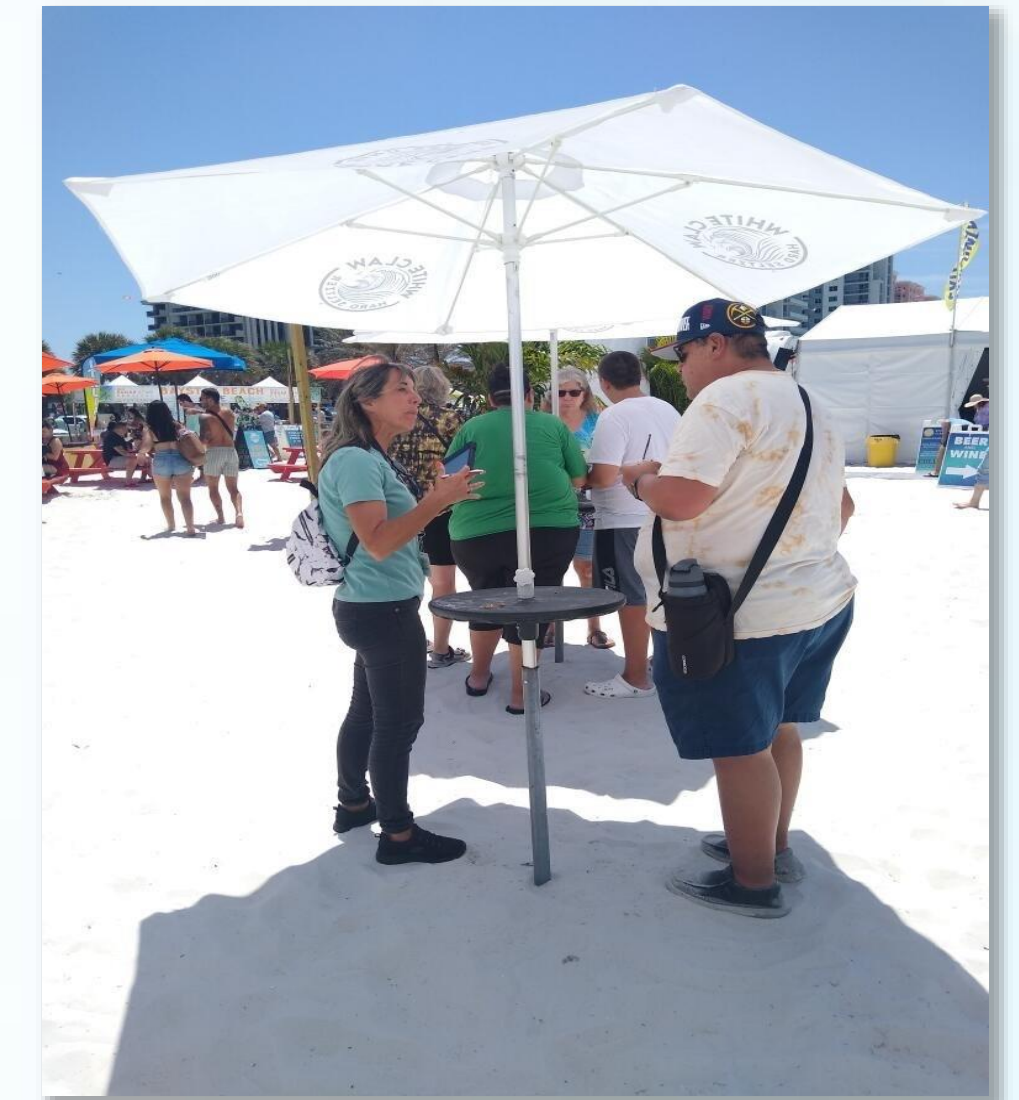


Above: Images of the St. Pete/Clearwater area.
Courtesy of [Instagram.com/vspc](https://www.instagram.com/vspc).

RESEARCH OVERVIEW & METHODOLOGY

Future Partners 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](https://www.instagram.com/vspc).



Q2 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 – Q2 2023

The following are the key findings related to the economic impact of tourism to Pinellas County from April 2023 – June 2023.

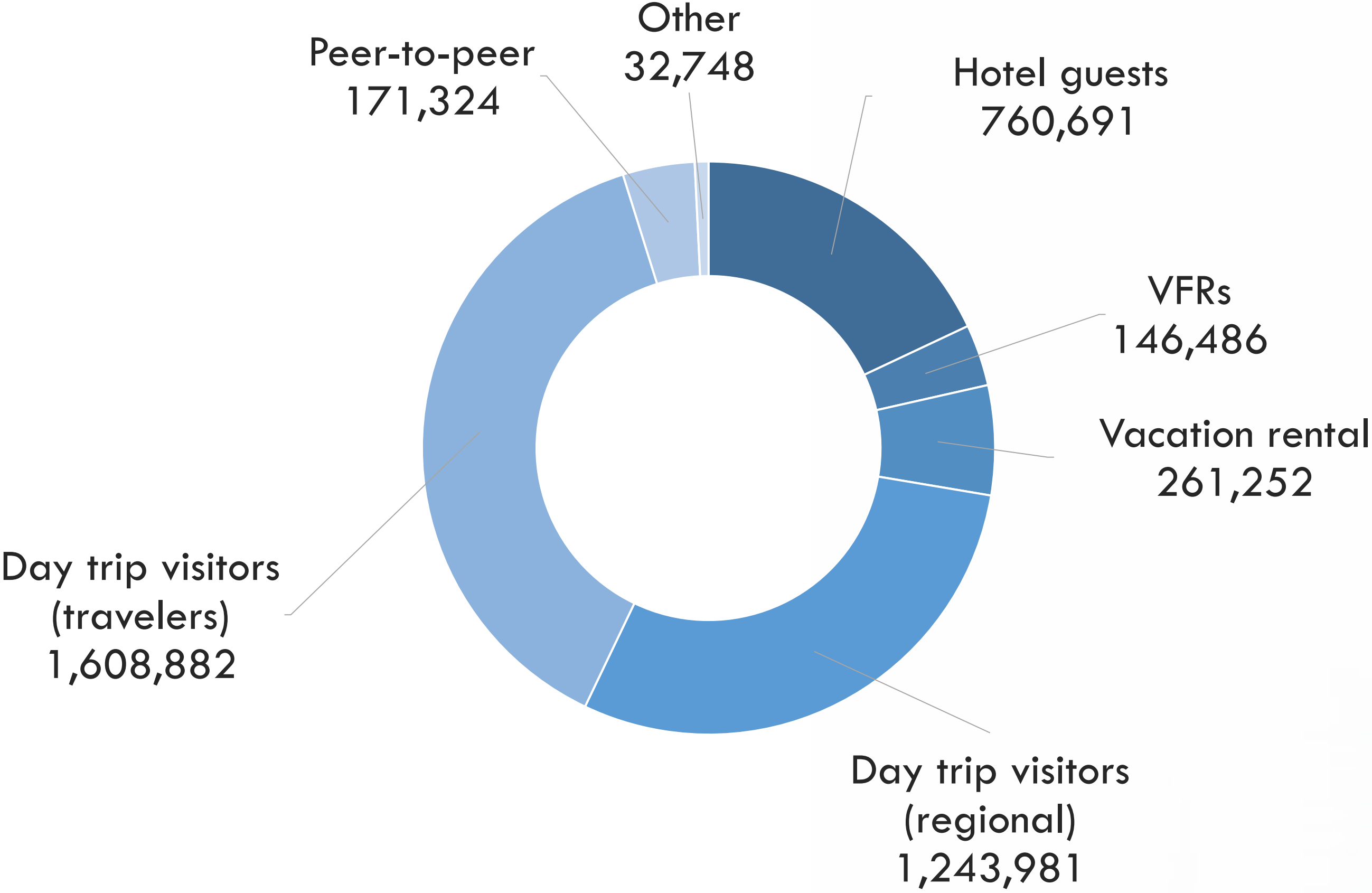
	April 2023	May 2023	June 2023	Q2 (April 2023 – June 2023)
Visitors	1,473,705	1,335,355	1,416,301	4,225,362
Direct Visitor Spending	\$587,299,845	\$519,751,013	\$549,069,928	\$1,656,120,785
Total Economic Impact of Tourism	\$991,952,923	\$871,253,047	\$918,794,070	\$2,782,000,040
Tax Revenues Generated	\$40,431,289	\$33,685,724	\$35,577,919	\$109,694,932
Hotel Room Nights	596,697	564,059	543,518	1,704,274
Visitor Industry Payroll	\$313,408,647	\$277,561,969	\$292,073,966	\$883,044,582
Jobs Supported	9,562	8,472	8,930	26,964

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 April 2023 – June 2023:

- **Visitors to Pinellas County** – Pinellas County had over 4.2 million visitors. The largest segment of visitors this quarter were day trip visitors from outside the surrounding region, comprising 1.6 million, or 38%, of all visitors.
- **Direct Visitor Spending in Pinellas County** – The Pinellas County tourism industry generated \$1.6 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 \$824 million, or 49%, of all visitor spending.
- **Total Economic Impact of Tourism to Pinellas County** – Tourism generated a total of \$2.78 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 \$109.7 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 1.70 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 \$883 million and supported 26,964 jobs county-wide.

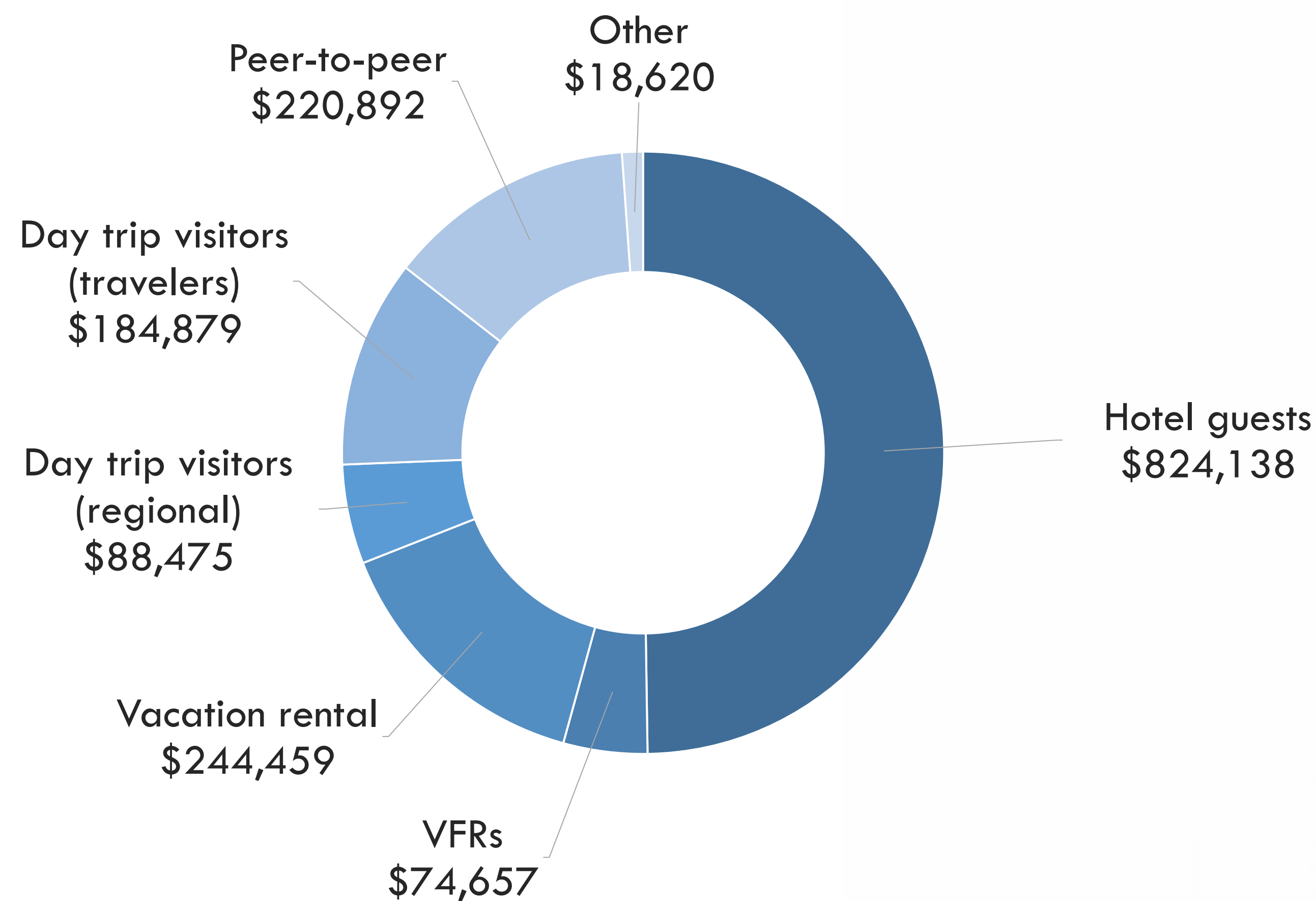
VISITORS TO PINELLAS COUNTY



Visitors to Pinellas County, by type of visitor

Hotel guests	760,691
VFRs	146,486
Vacation rental	261,252
Day trip visitors (regional)	1,243,981
Day trip visitors (travelers)	1,608,882
Peer-to-peer	171,324
Other	32,748
TOTAL VISITORS	4,225,362

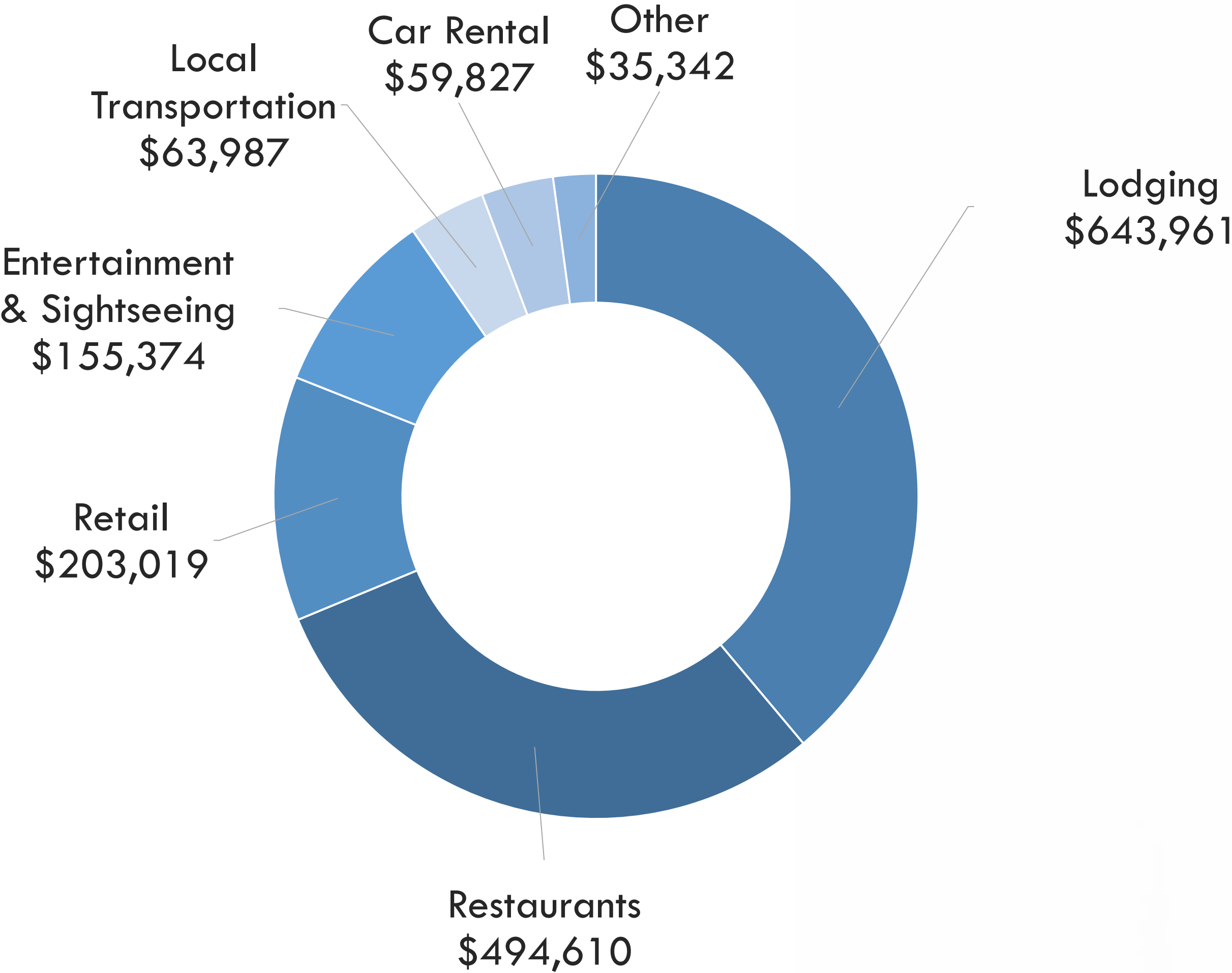
DIRECT VISITOR SPENDING: BY TYPE OF VISITOR



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

Hotel guests	\$824,138
VFRs	\$74,657
Vacation rental	\$244,459
Day trip visitors (regional)	\$88,475
Day trip visitors (travelers)	\$184,879
Peer-to-peer	\$220,892
Other	\$18,620
TOTAL DIRECT VISITOR SPENDING	\$1,656,121

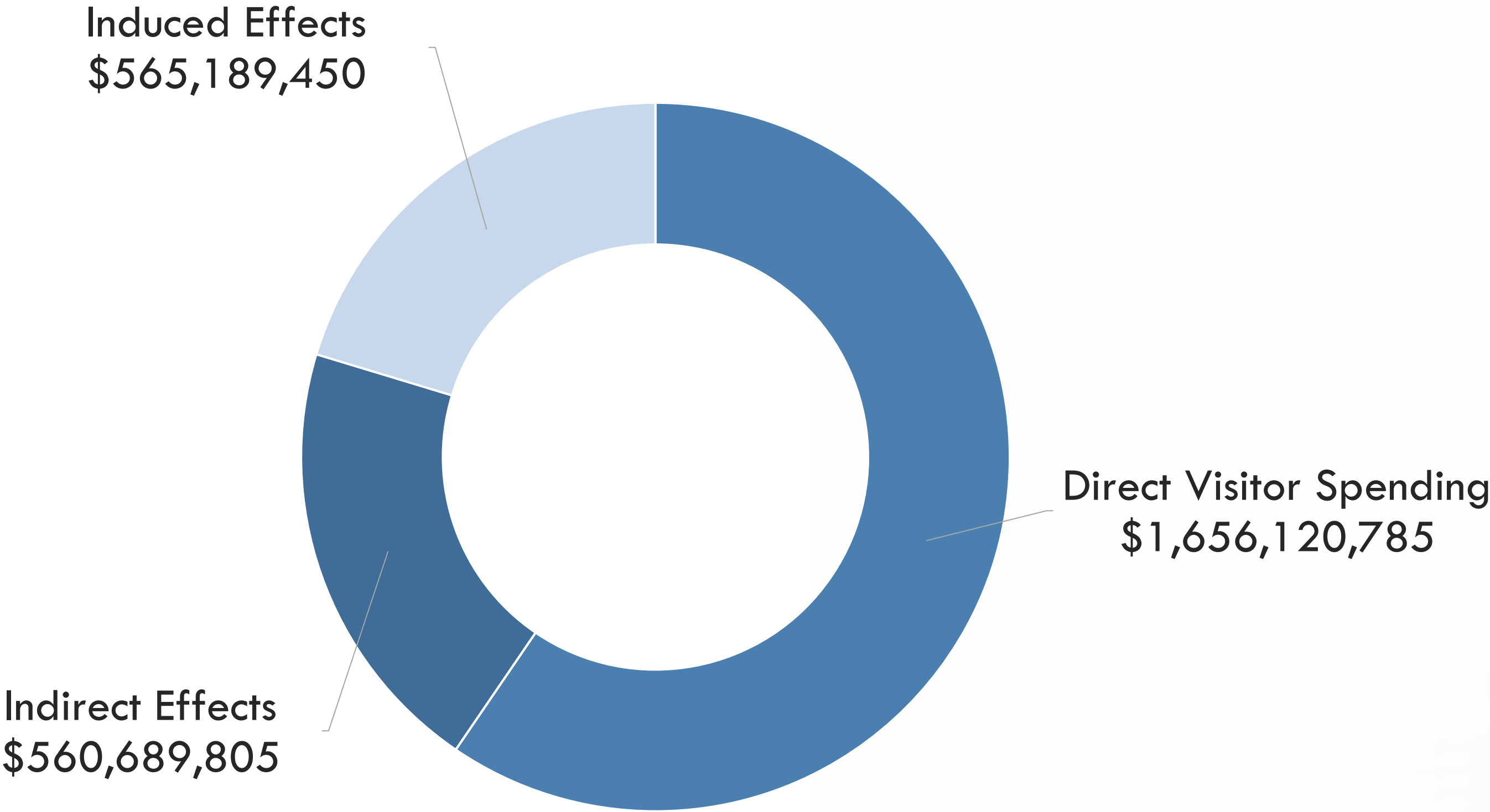
DIRECT VISITOR SPENDING: BY TYPE OF SPENDING



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

Lodging	\$643,961
Restaurants	\$494,610
Retail	\$203,019
Entertainment & Sightseeing	\$155,374
Local Transportation	\$63,987
Car Rental	\$59,827
Other	\$35,342
TOTAL DIRECT VISITOR SPENDING	\$1,656,121

TOTAL ECONOMIC IMPACT

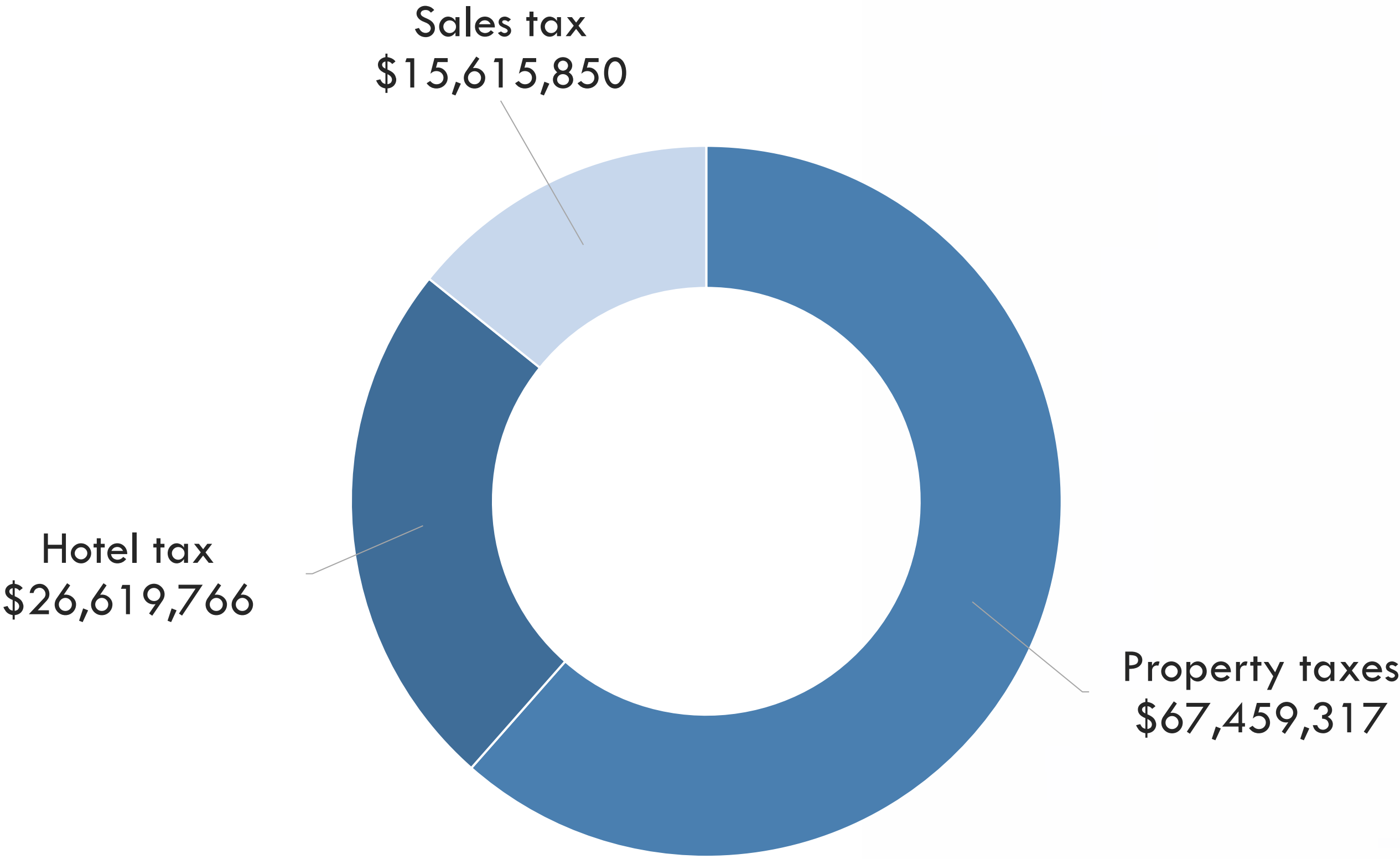


Economic Impact Estimates, by type of effect

Direct Visitor Spending	\$1,656,120,785
Indirect Effects	\$560,689,805
Induced Effects	\$565,189,450

TOTAL ECONOMIC IMPACT \$2,782,000,040

TAX REVENUES GENERATED



Tax Revenues Generated, by type of tax

Property taxes	\$67,459,317
Hotel Tax	\$26,619,766
Sales tax	\$15,615,850

TOTAL TAX REVENUES GENERATED \$109,694,932

ECONOMIC IMPACT YOY COMPARISON

The following presents the estimated economic impact of tourism to Pinellas County comparing Q2 2023 to prior years.

- In Q2 2023, the travel and tourism industry in Pinellas County saw consistent growth in visitor volume, but with the global inflation in consumer prices finally returning to normal, visitor spending is down slightly compared to last year though still up double digits compared to pre-pandemic times.
- Volume in Q2 2023 is up 3.6% from 2022 but slightly down -1.3% from 2019, the pre-pandemic benchmark. Direct visitor spending this quarter is down -8.8% from Q2 2022 and total economic impact and taxes generated are both down between 6-8%.
- Although visitor spending is down from last year, spending habits are clearly still up significantly compared to 2019, with growth in spending far exceeding growth in volume. Direct visitor spending in Q2 2023 is estimated to be up 12.1% from 2019 and total economic impact is estimated to be up 13.7% from 2019.
- Hotel room nights in Q2 2023 is down slightly compared to 2022 and is still shy of the 2019 benchmark (down -2.5% from 2022 and down -6.6% from 2019).

ECONOMIC IMPACT YOY COMPARISON

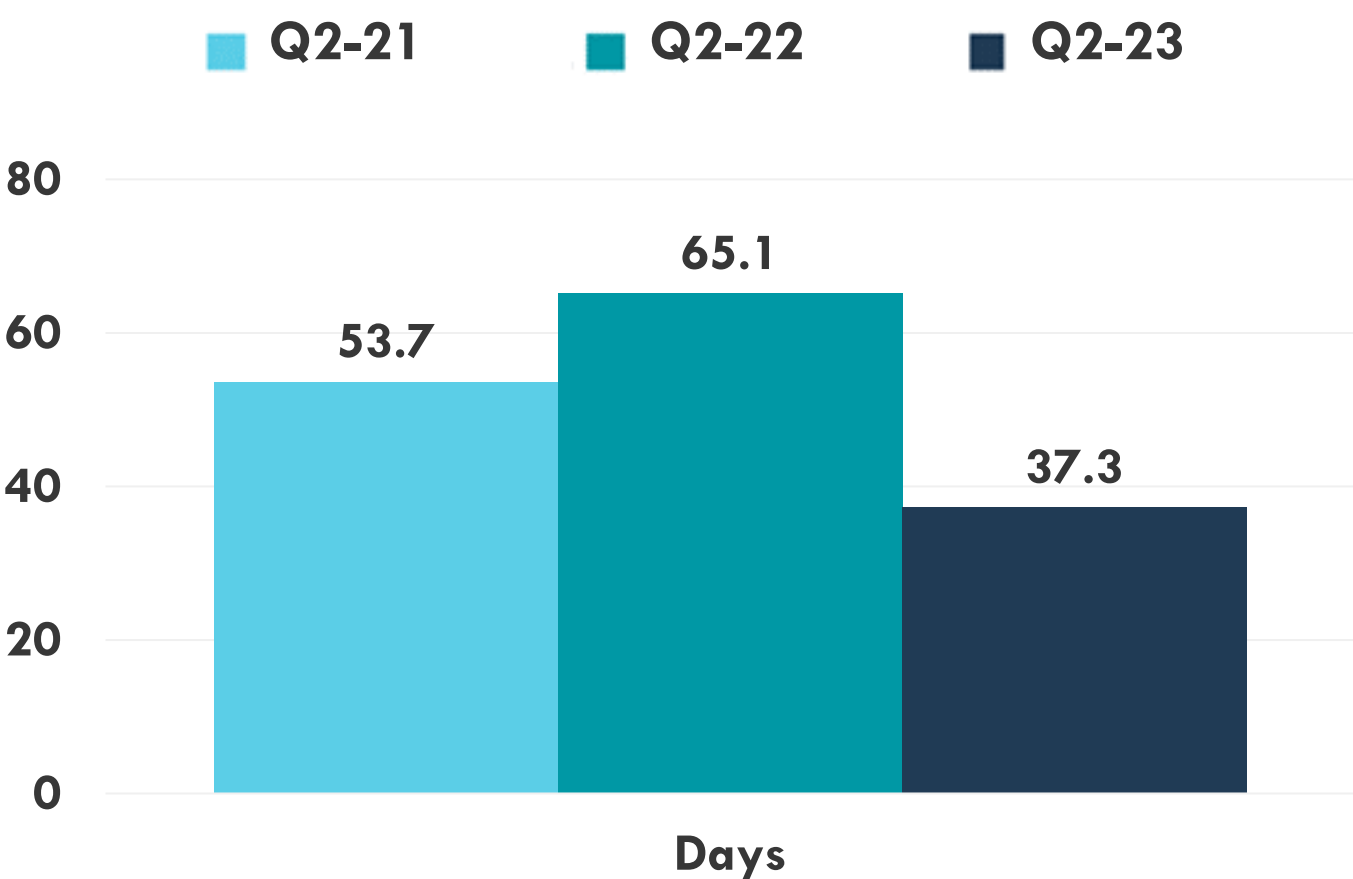
	Q2 2023	Q2 2022	% Change (Q2 '22 - Q2 '23)	Q2 2019	% Change (Q2 '19 - Q2 '23)
Visitors to Pinellas County	4,225,362	4,077,416	3.6%	4,282,463	-1.3%
Direct Visitor Spending in Pinellas County	\$1,656,120,785	\$1,815,368,425	-8.8%	\$1,477,177,587	12.1%
Total Economic Impact of Tourism to Pinellas County	\$2,782,000,040	\$3,053,492,119	-8.9%	\$2,447,419,026	13.7%
Tax Revenues Generated for Pinellas County	\$109,694,932	\$116,834,816	-6.1%	\$90,271,569	21.5%
Hotel Room Nights	1,704,274	1,747,912	-2.5%	1,823,743	-6.6%
Visitor Industry Payroll	\$883,044,582	\$980,252,557	-9.9%	\$785,923,505	12.4%
Jobs Supported	26,964	30,150	-10.6%	24,710	9.1%

The background image shows a pirate ship, the 'Royal Conquest', docked at a wooden pier. A sign for 'Dolphin Quest' is visible on the pier. The ship has multiple masts with flags and bunting. The scene is set on a body of water with a distant shoreline.

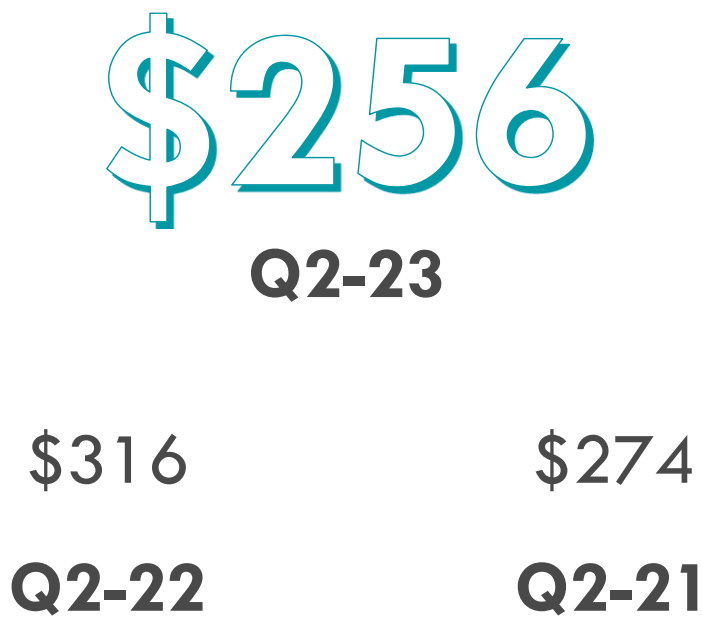
Q2 2023 St. Pete/Clearwater Overall Visitor Summary

Q2 2023 comparison to Q2 2022 and Q2 2021

Average Time Between Decision to Visit & Arrival



Average Daily Spending (per travel party)



Travel Party Size

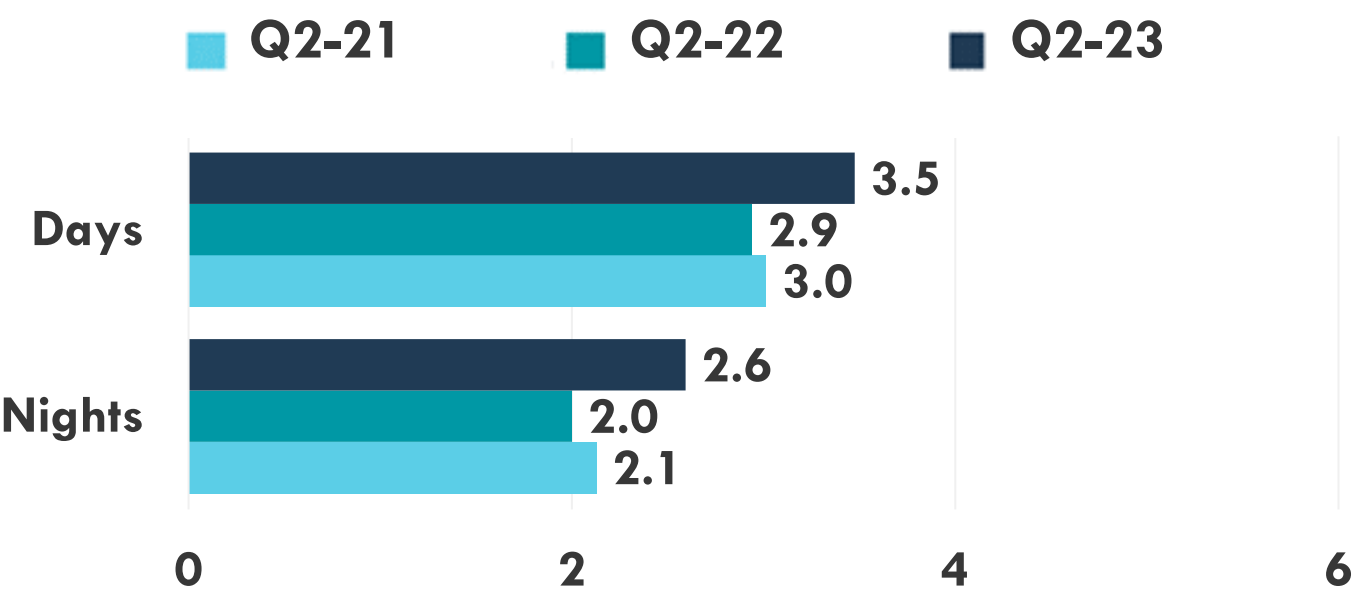


2.4

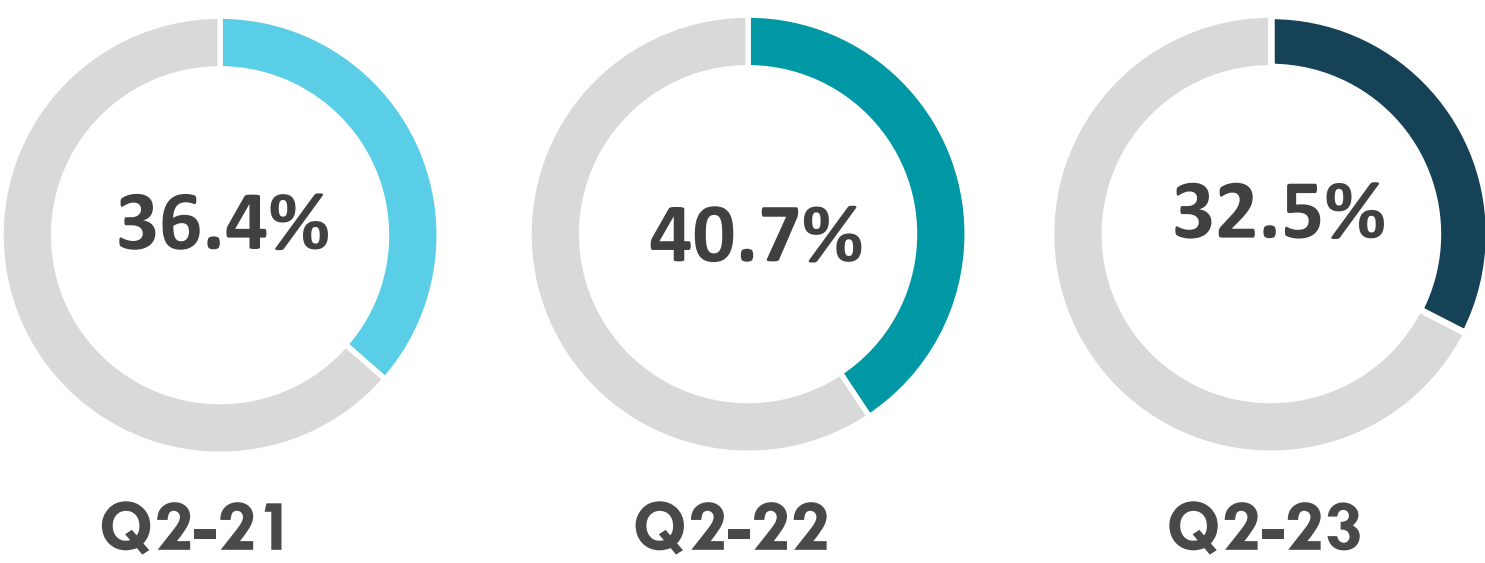
Q2-23

Q2-22	2.7
Q2-21	2.6

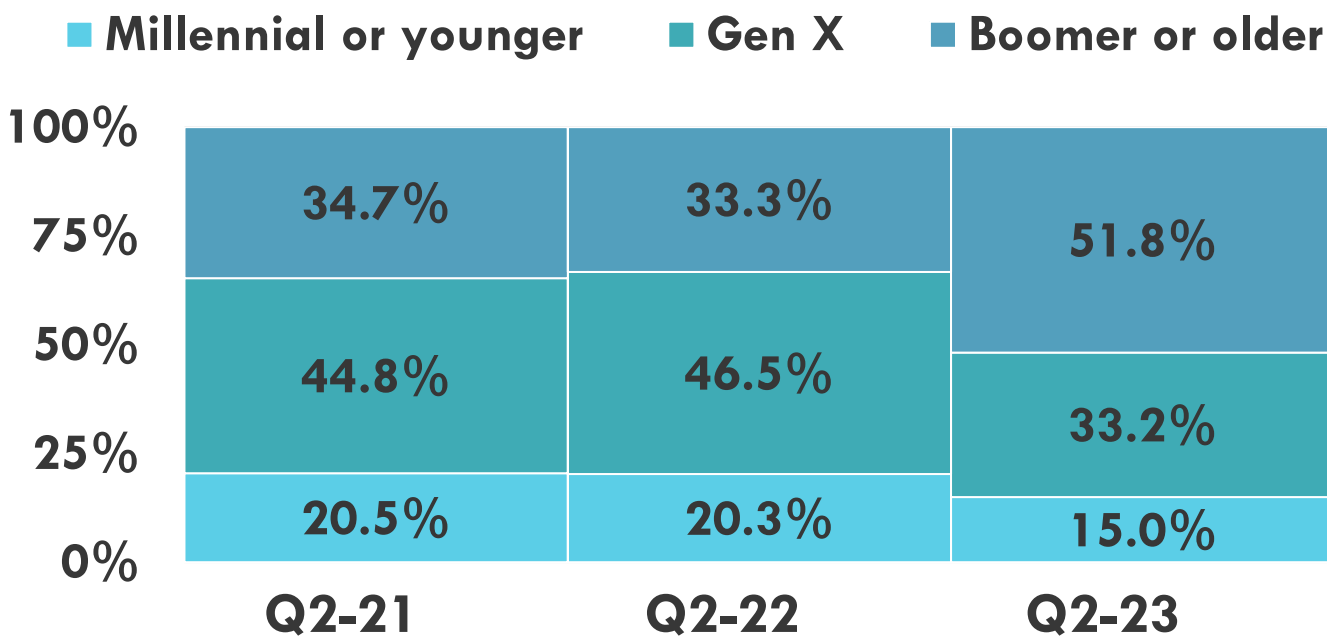
Average Days & Nights



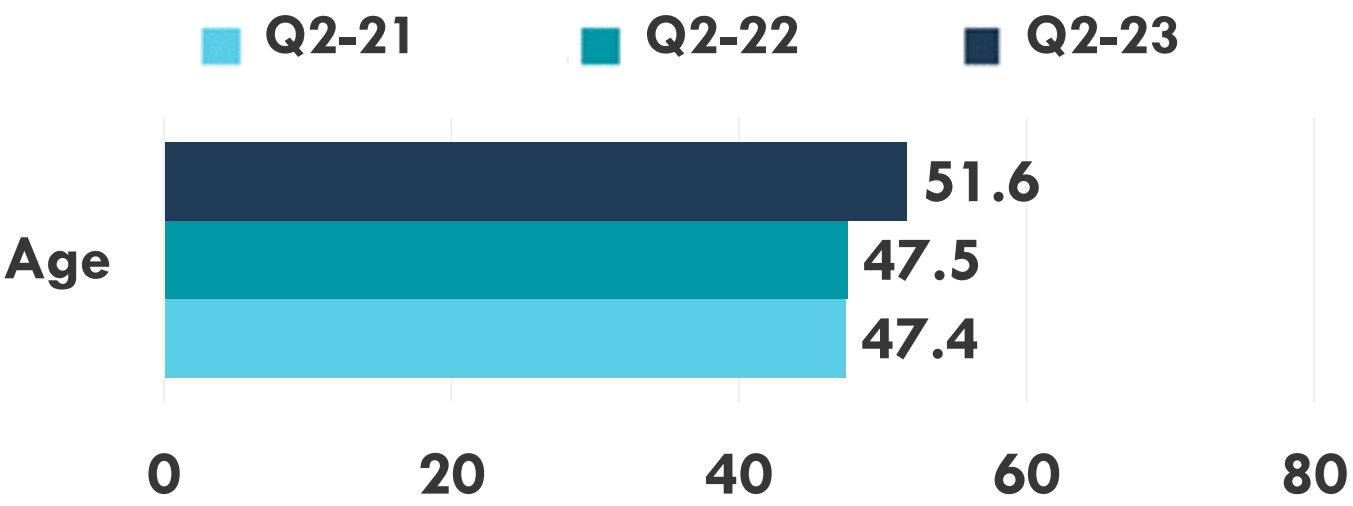
Percent Staying Overnight



Generations



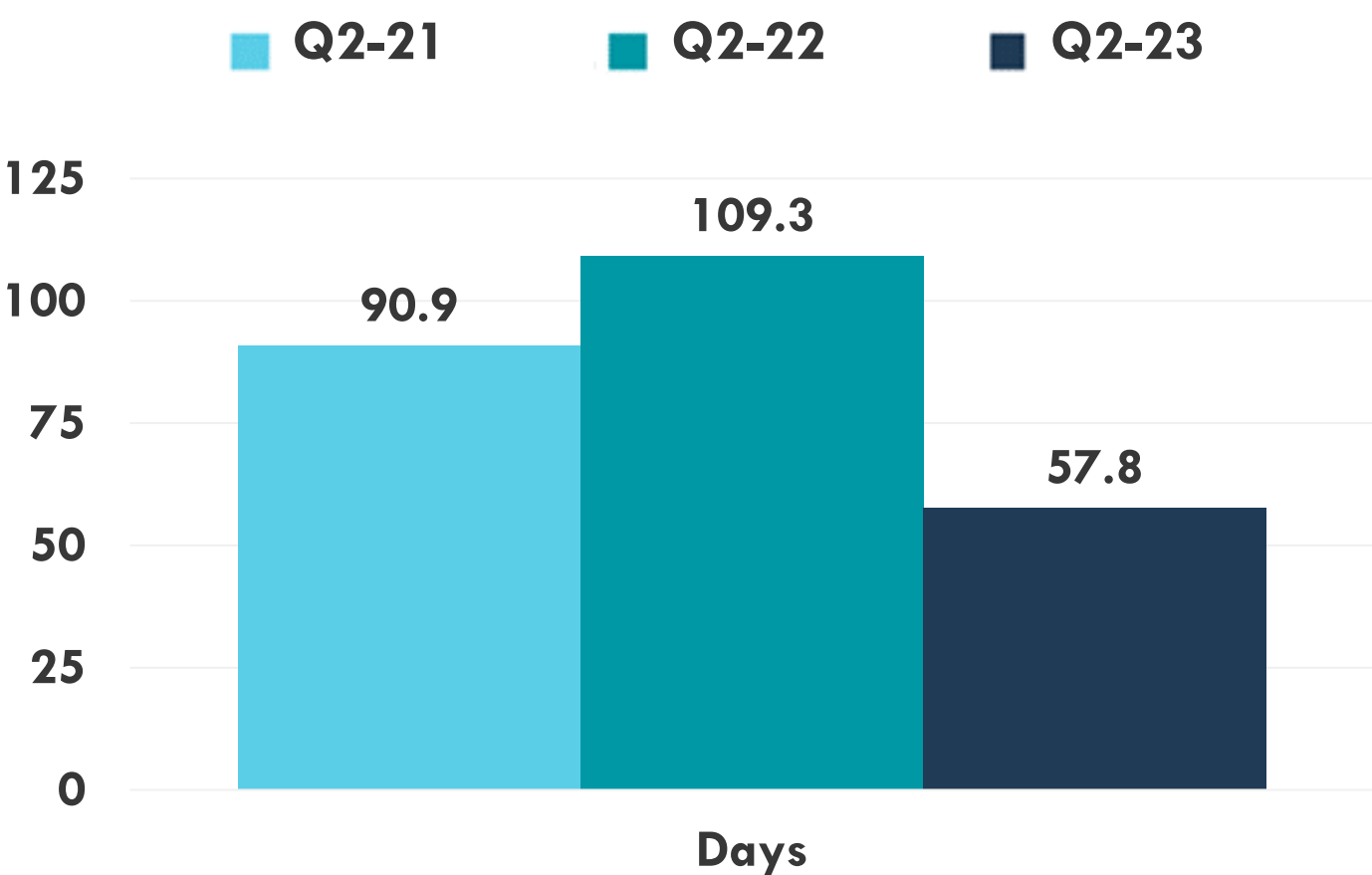
Average Age



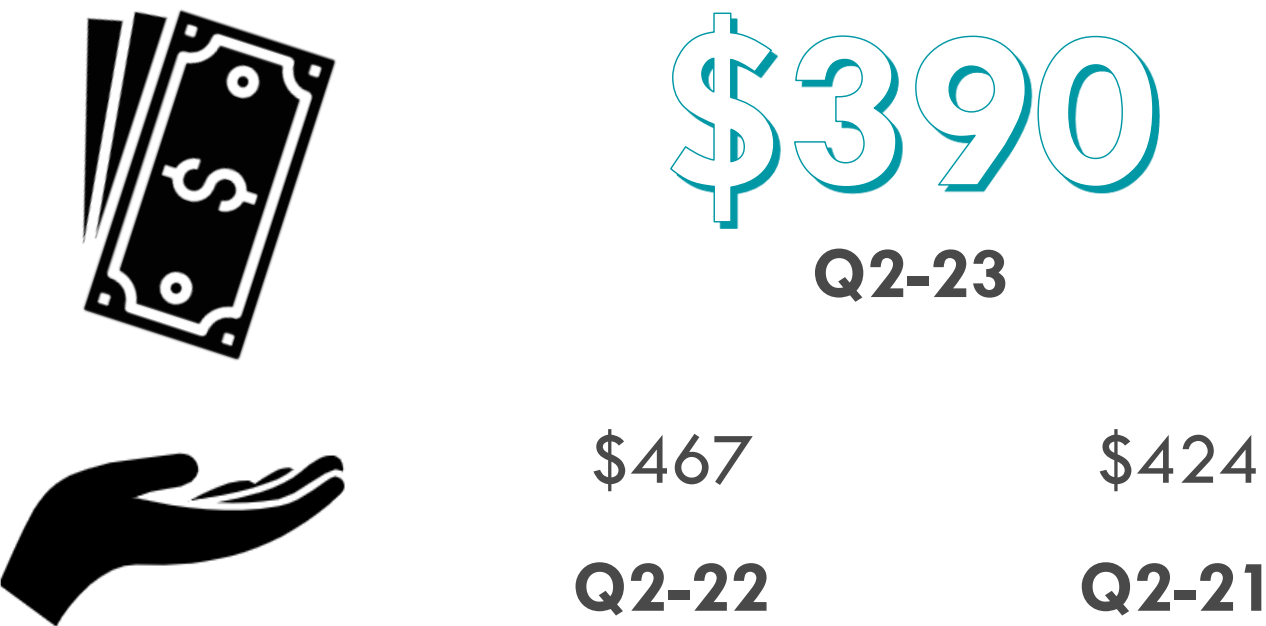
Average Income



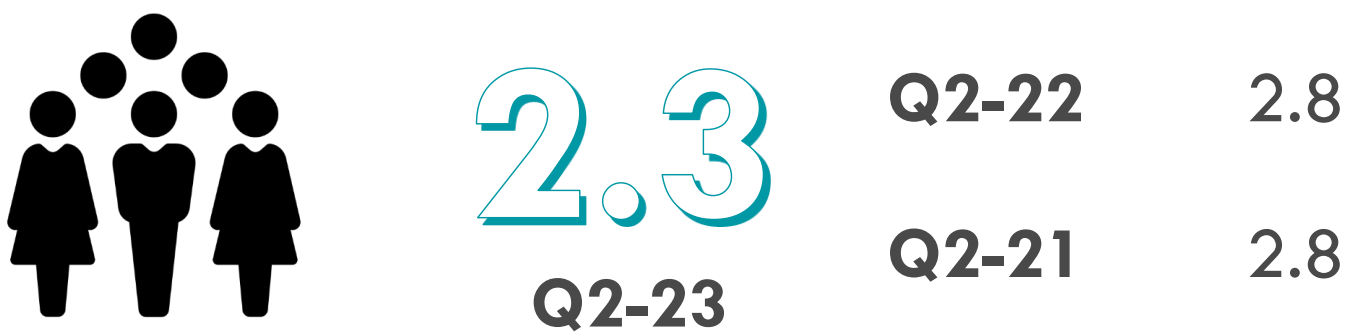
Average Time Between Decision to Visit & Arrival



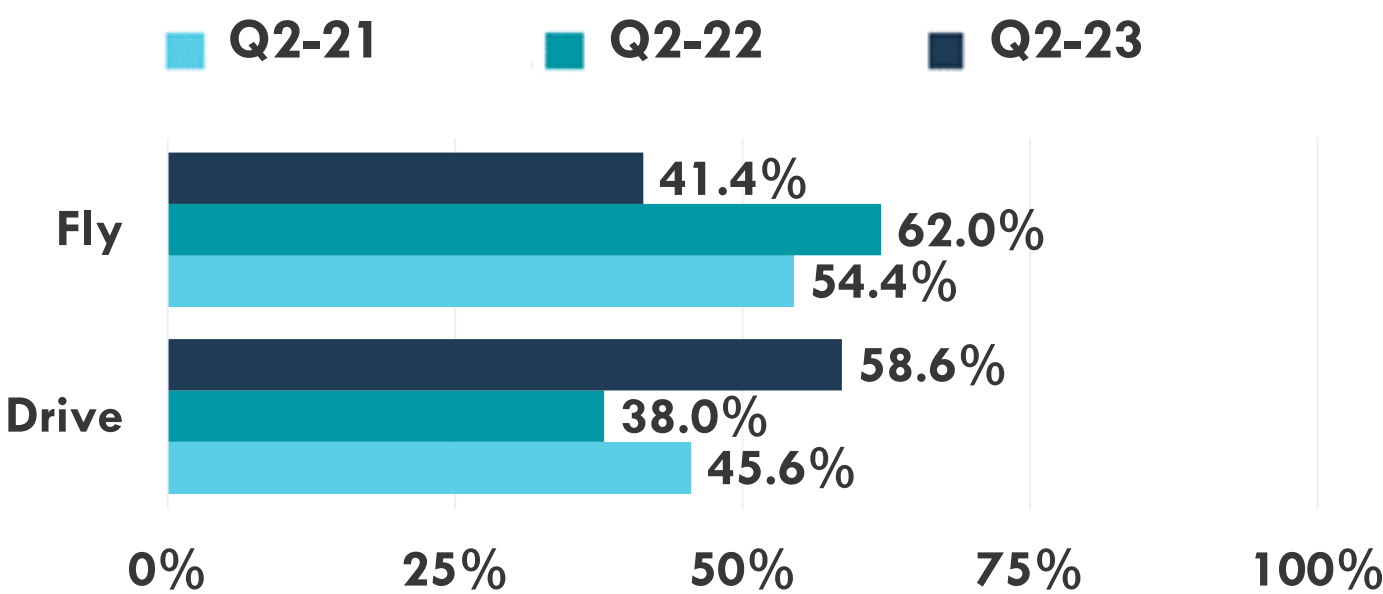
Average Daily Spending (per travel party)



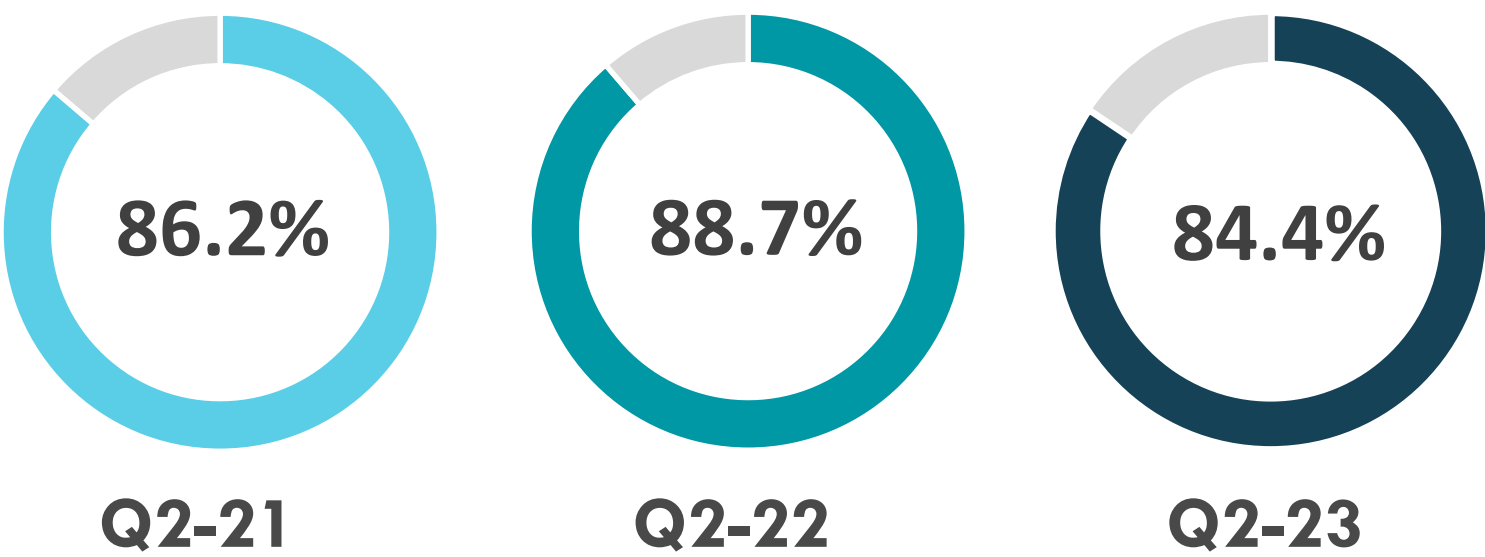
Travel Party Size



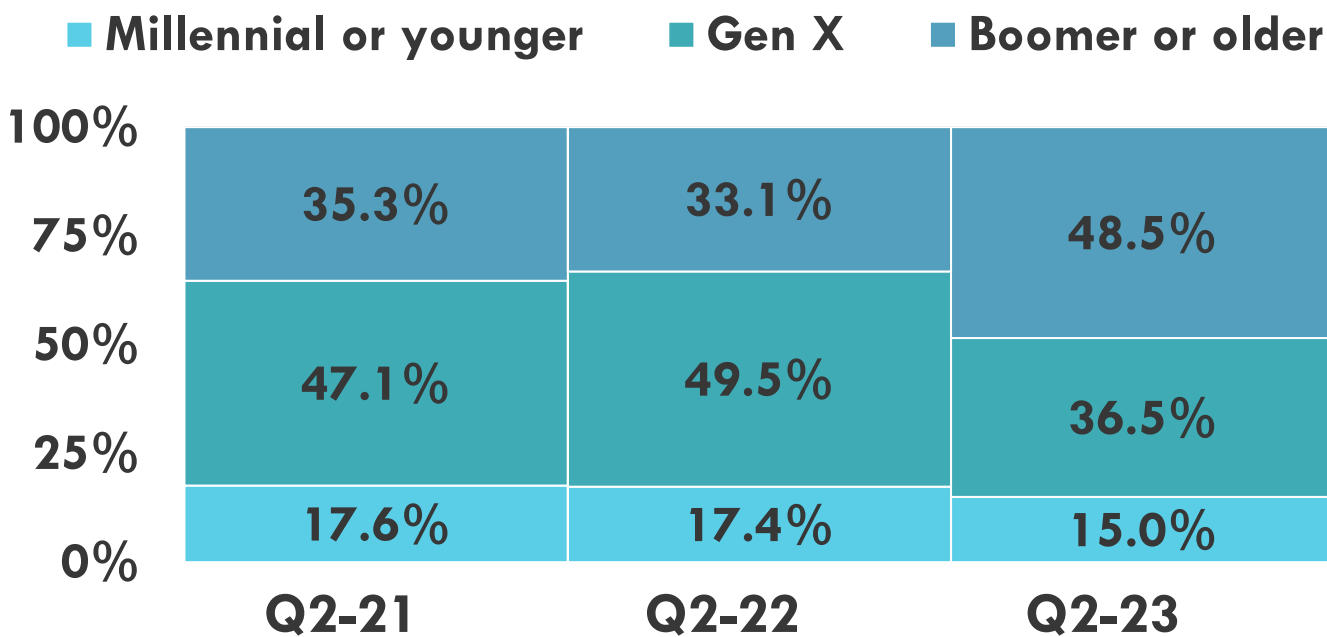
Arrival Method



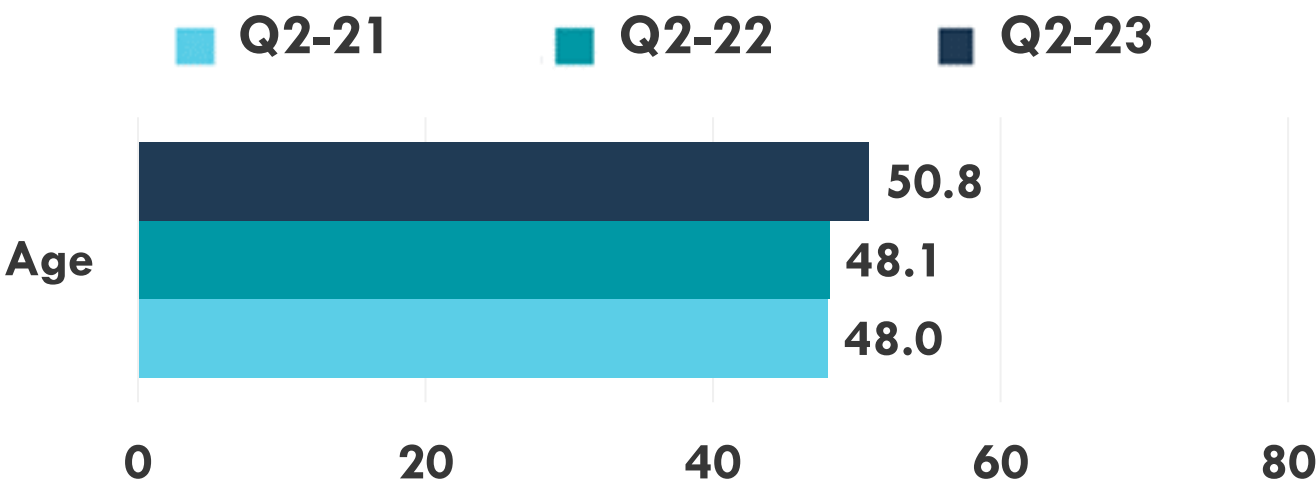
Percent Out-of-State



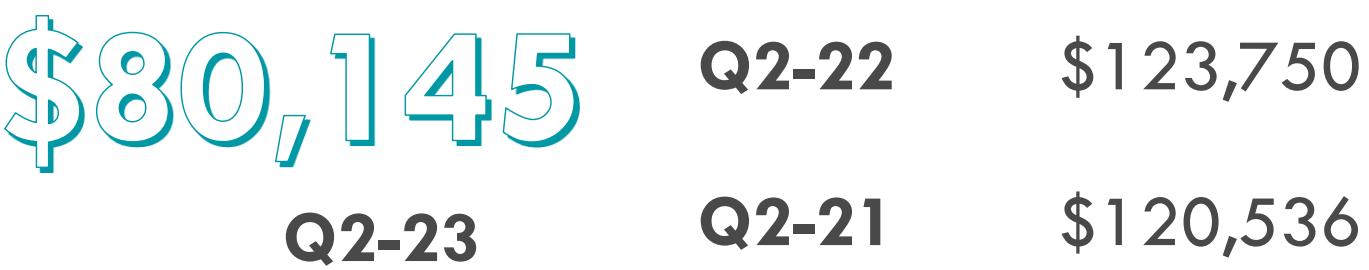
Generations



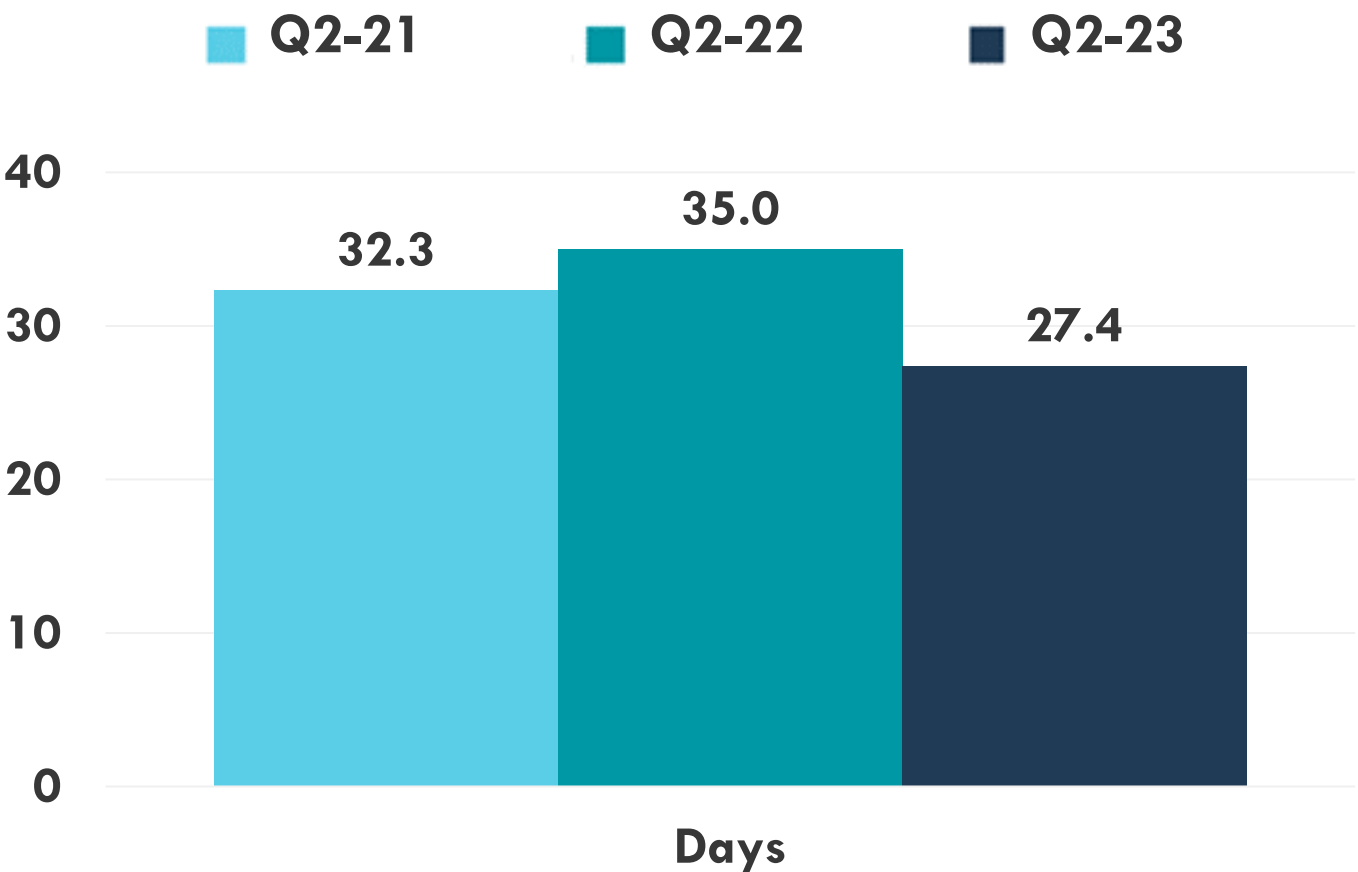
Average Age



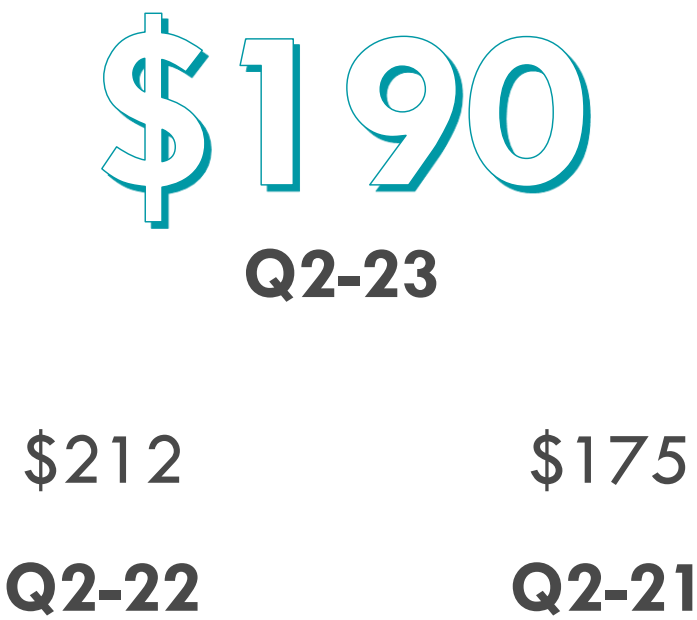
Average Income



Average Time Between Decision to Visit & Arrival



Average Daily Spending (per travel party)



Travel Party Size

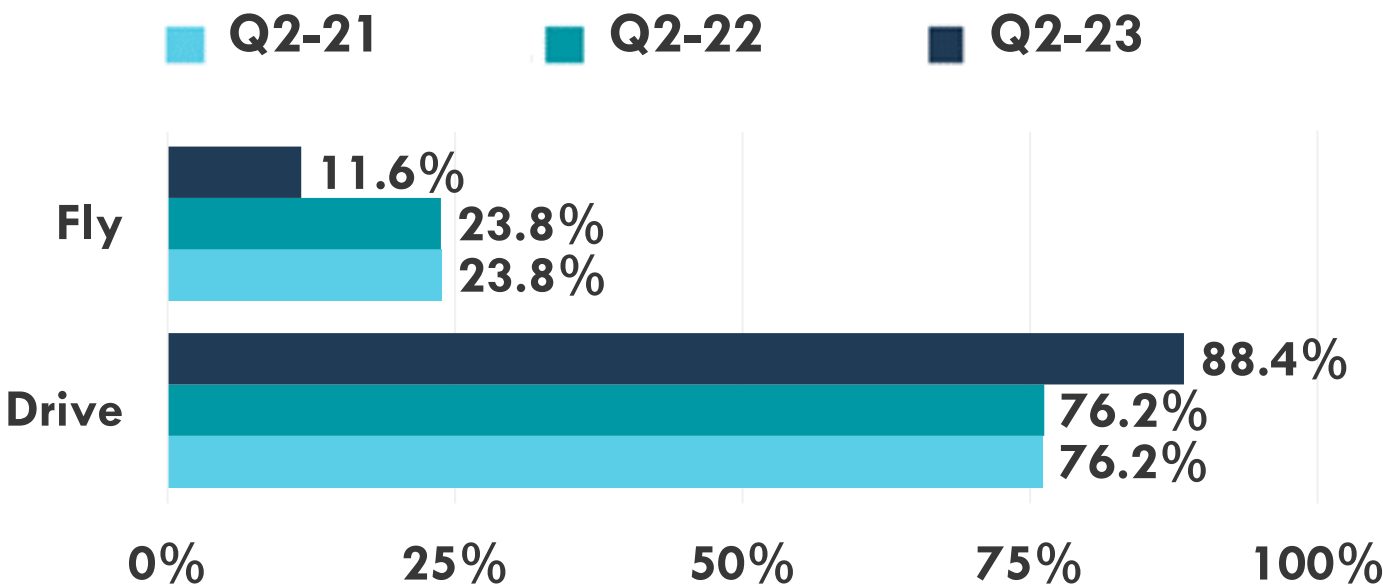


2.5

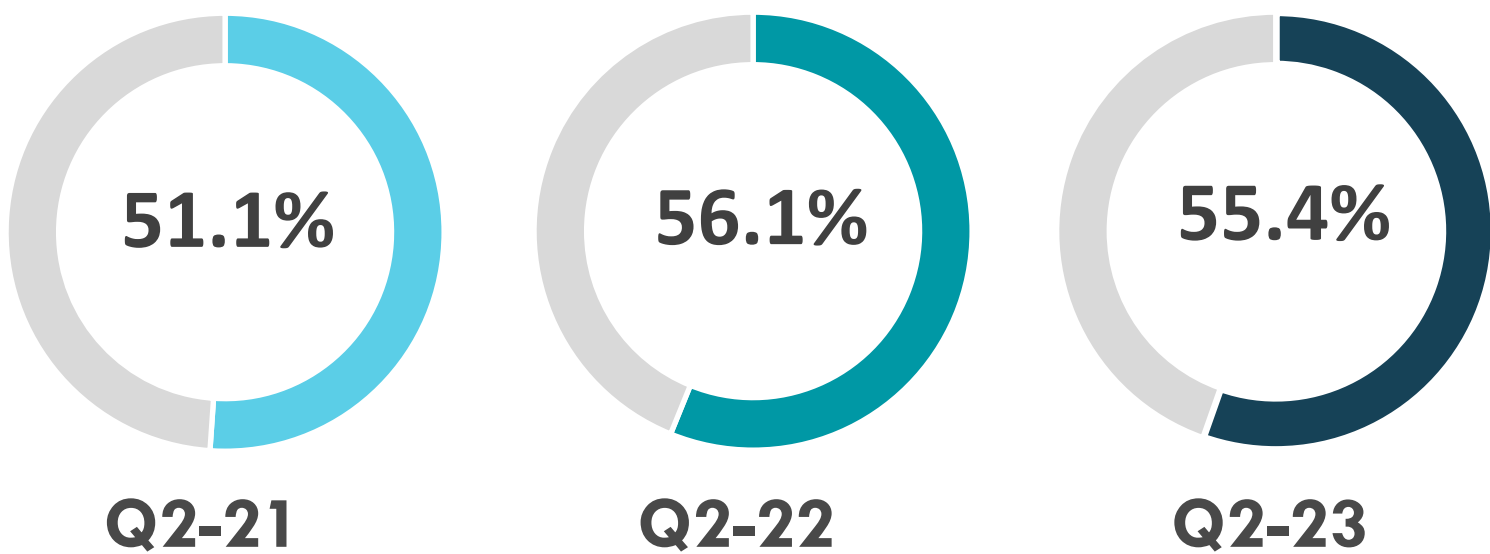
Q2-23

Q2-22	2.7
Q2-21	2.6

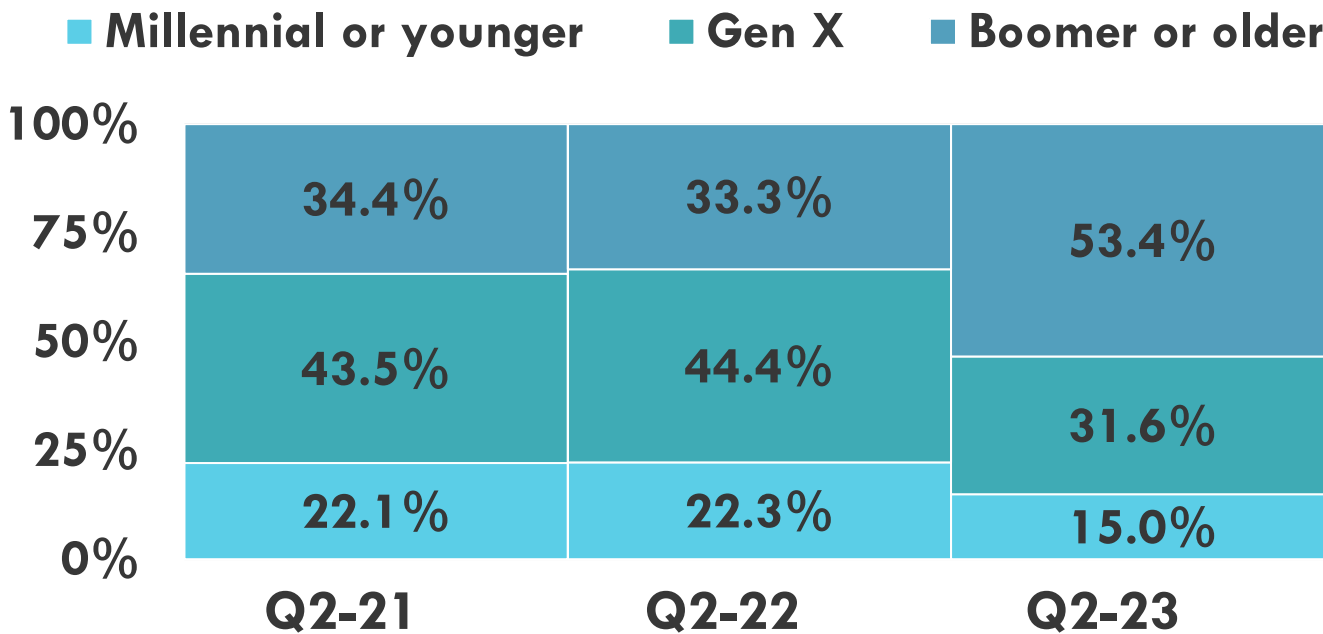
Arrival Method



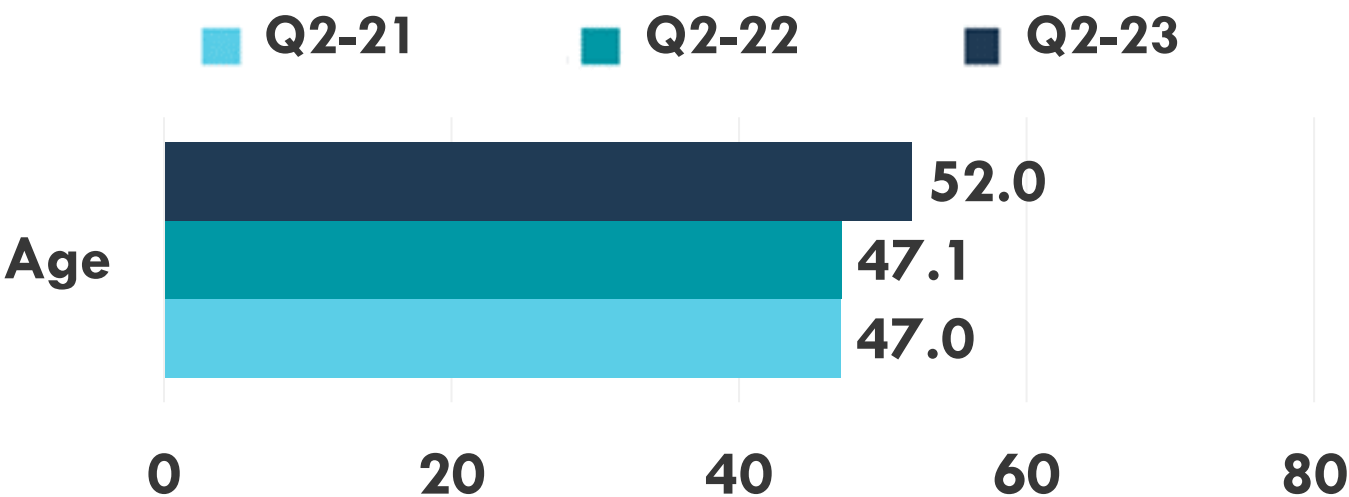
Percent Out-of-State



Generations



Average Age



Average Income





Q2 2023 Visitor Summary by Traveler Segment

GATE 1

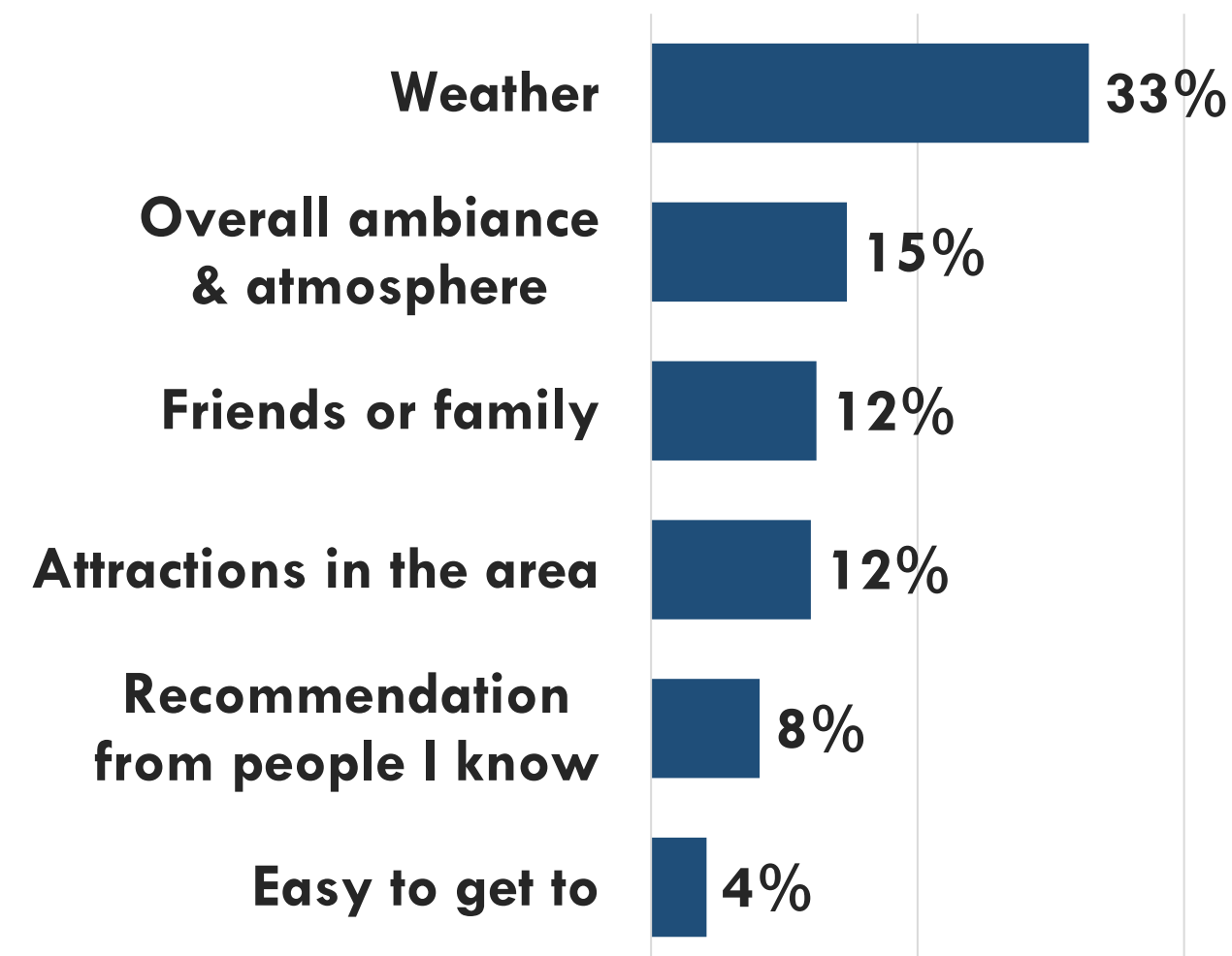
GATE 1

THE BEACH GO-ER

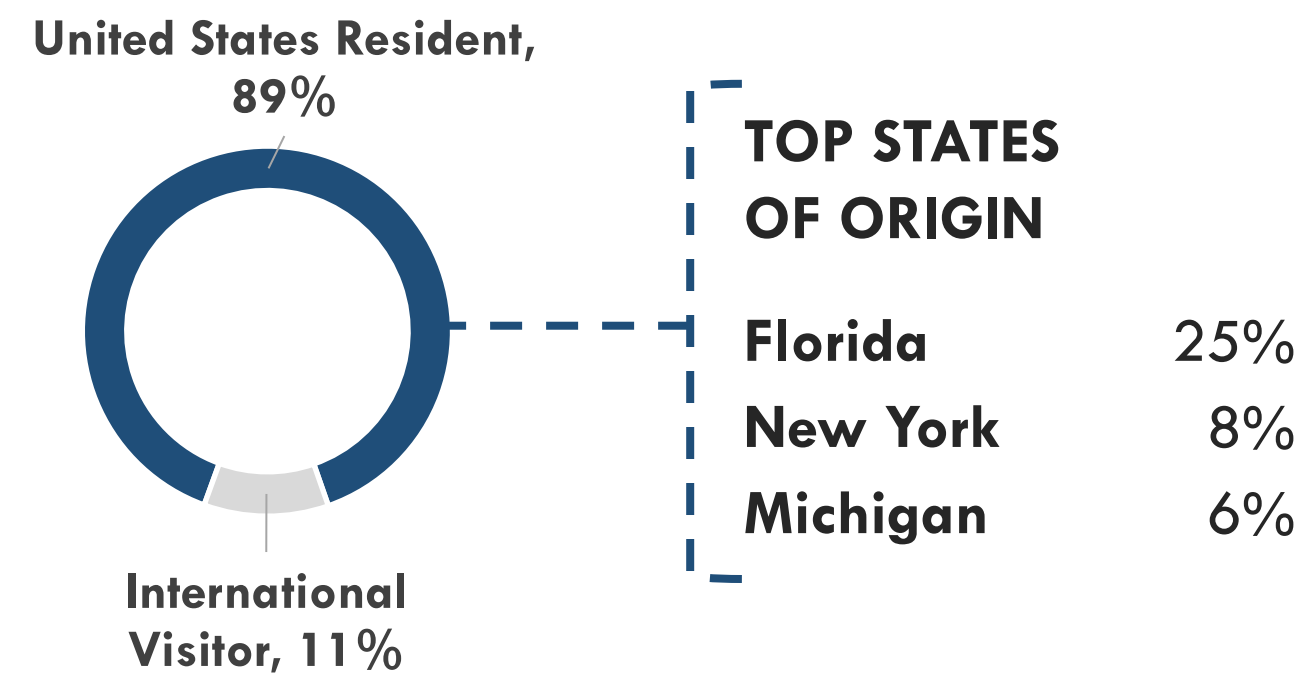
Q2 2023

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



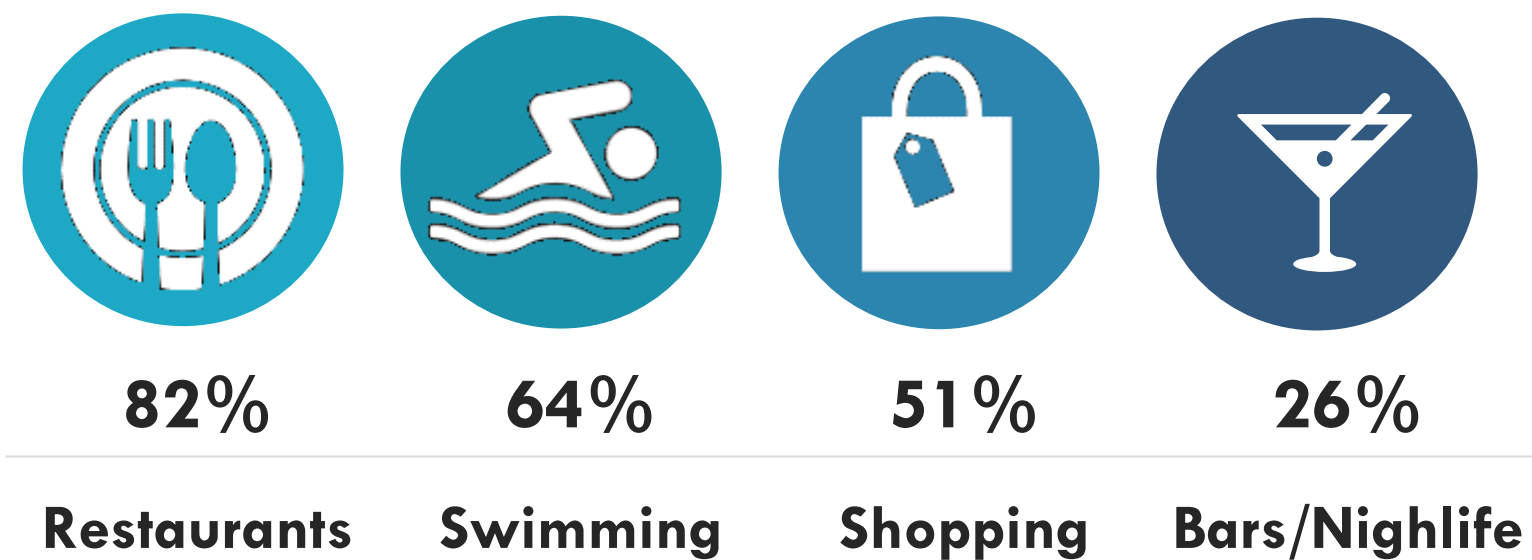
Domestic vs. International



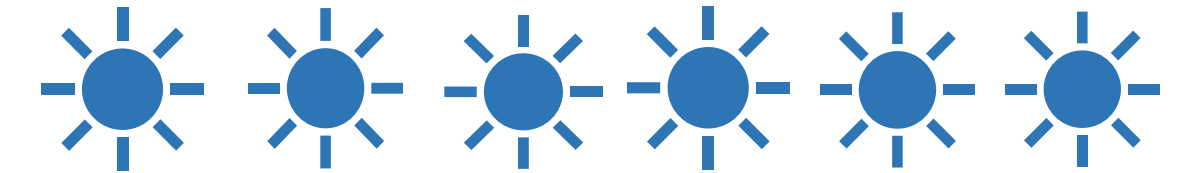
Top Communities Visited

Clearwater Beach	52%
Madeira Beach	39%
St. Petersburg	31%
St. Pete Beach	20%
Dunedin	18%

Top Activities

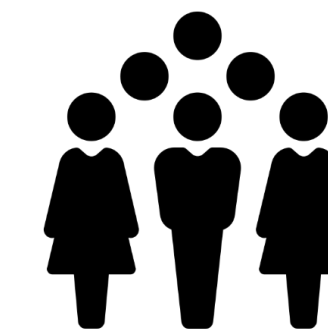


Length of Stay



6.0 Days on Average

Travel Party Size



2.5 People

21% Traveled with Children

Daily Spending



\$159
Per Person



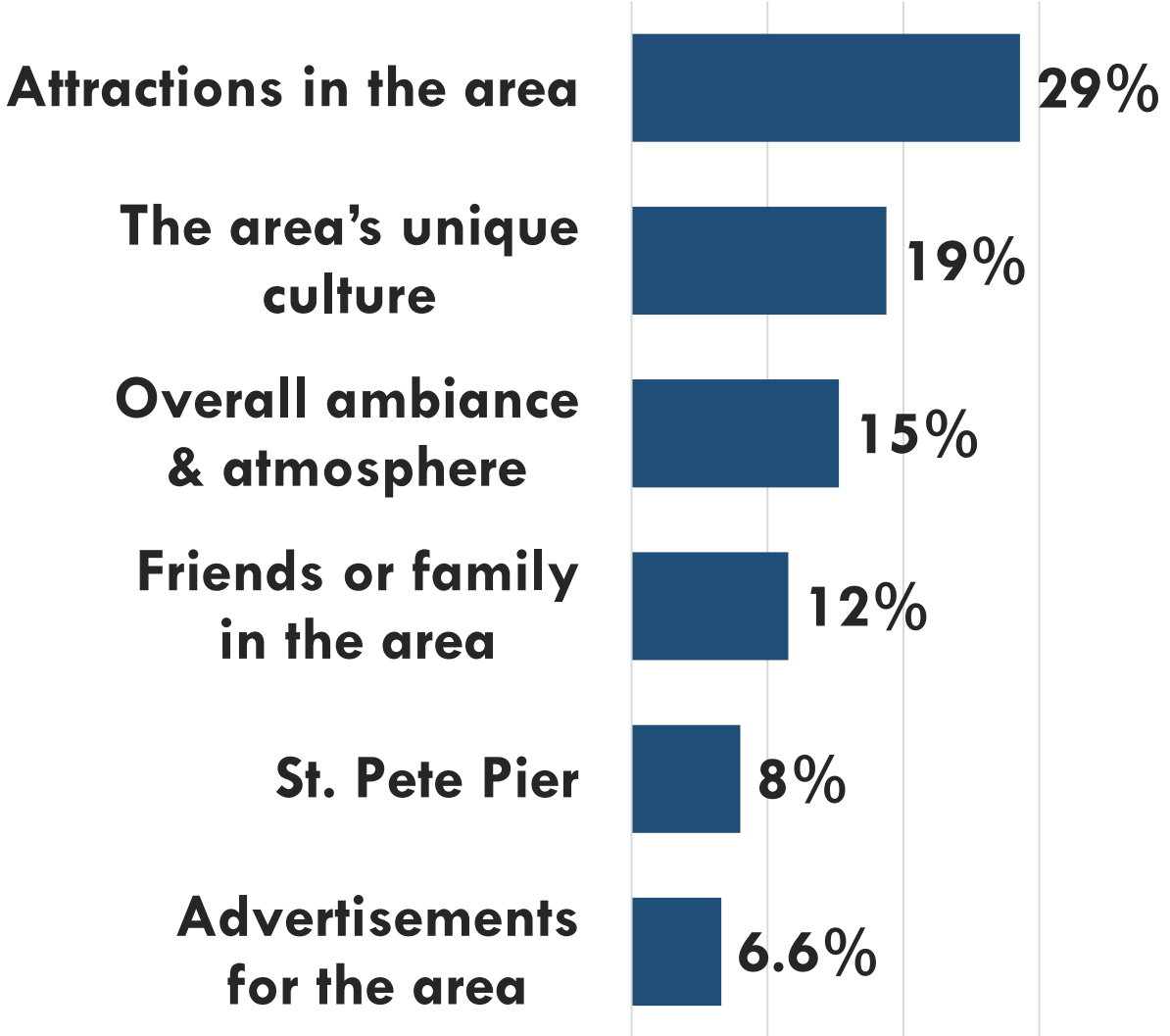


THE ARTS & CULTURE VISITOR

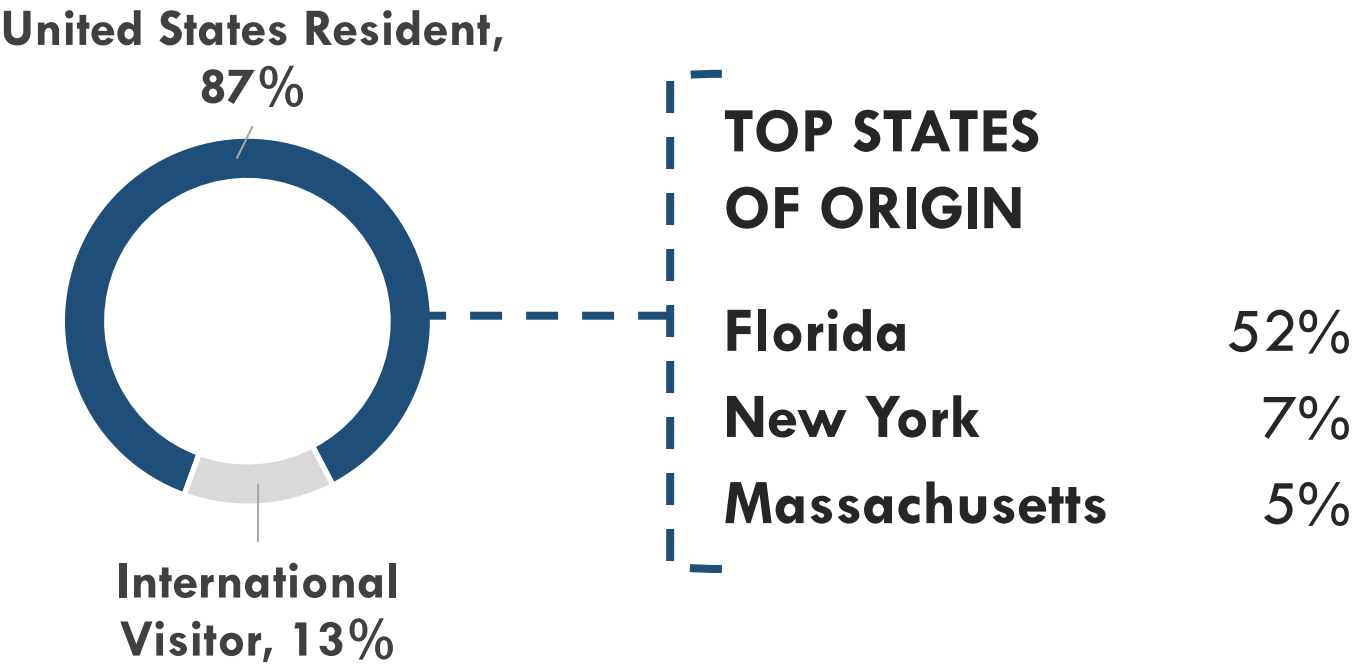
Q2 2023

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



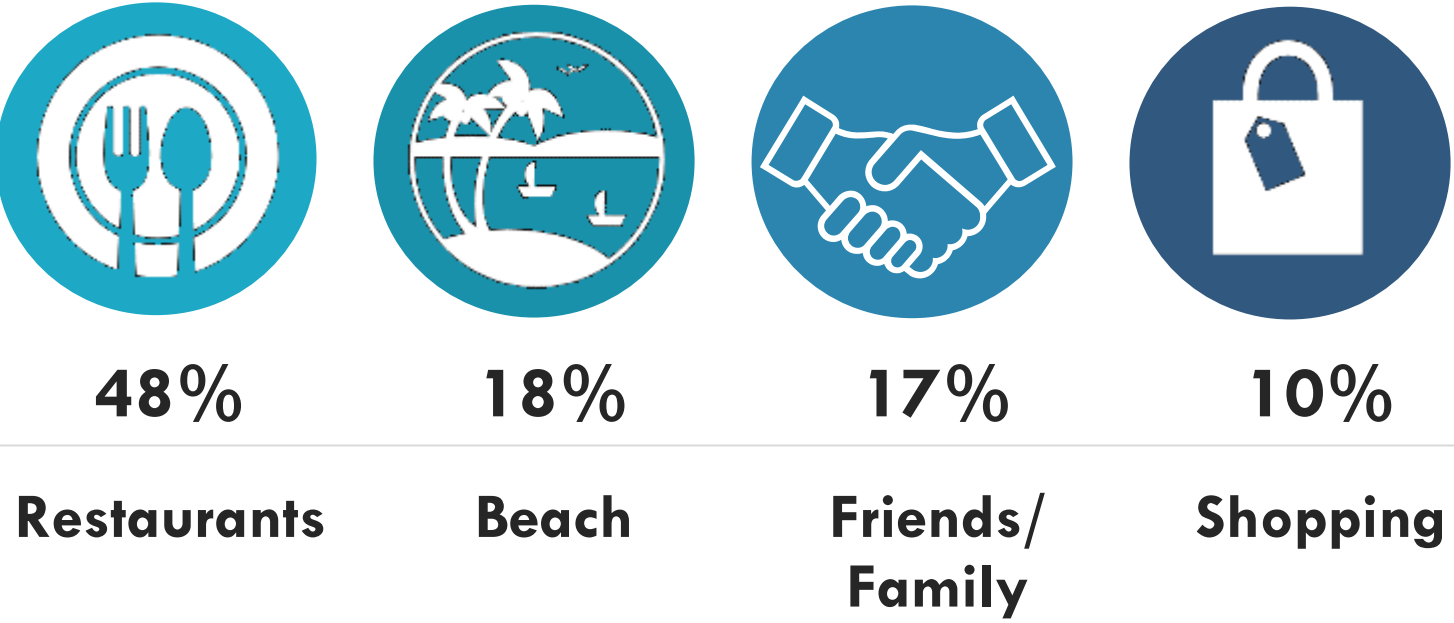
Domestic vs. International



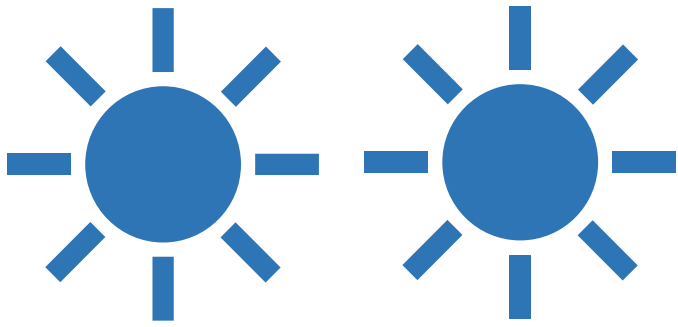
Top Communities Visited

St. Petersburg	89%
Clearwater Beach	8%
Madeira Beach	6%
St. Pete Beach	6%
Dunedin	4%

Top Activities

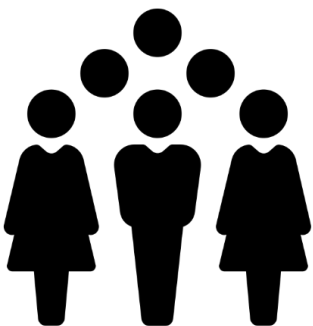


Length of Stay



2.0 Days on Average

Travel Party Size



2.2 People

8% Traveled with Children

Daily Spending



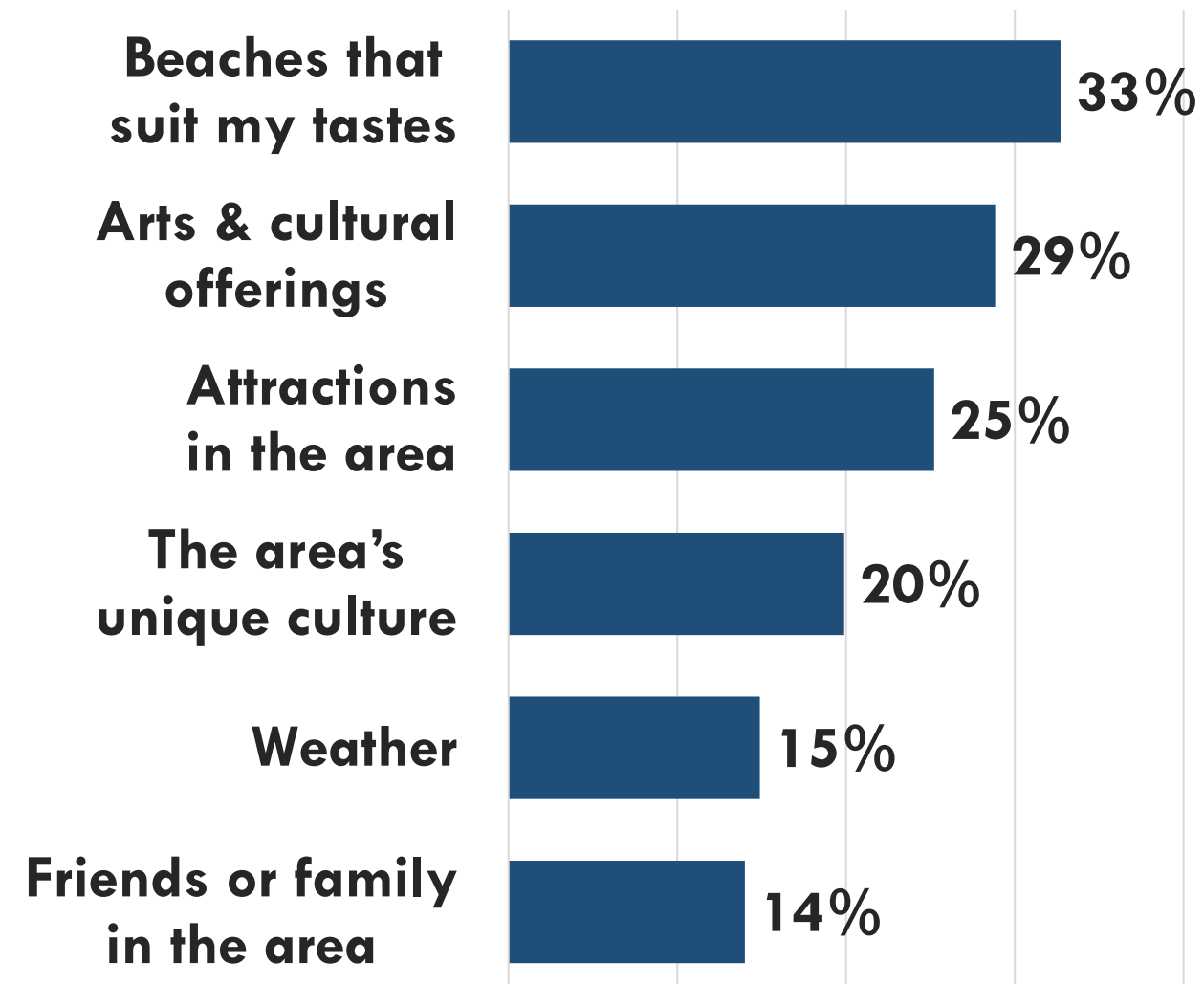
\$92 Per Person

THE AFFLUENT VISITOR

Q2 2023

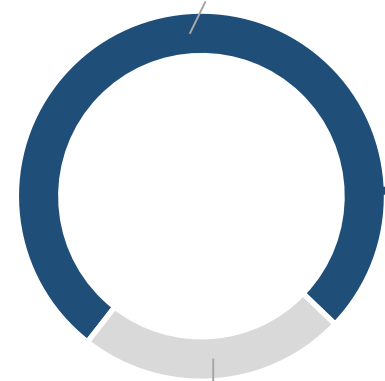
Results reflect visitors who reported having an annual household income of \$150,000+

Factors Important to Destination Decision



Domestic vs. International

United States Resident,
77%



International
Visitor, 23%

TOP STATES OF ORIGIN

Florida	29%
Indiana	17%
Alabama	7%
Nebraska	7%

Top Communities Visited

St. Petersburg	63%
Clearwater Beach	34%
Clearwater	16%
Madeira Beach	16%
St. Pete Beach	12%

Top Activities



44%

Museums



39%

Beach



35%

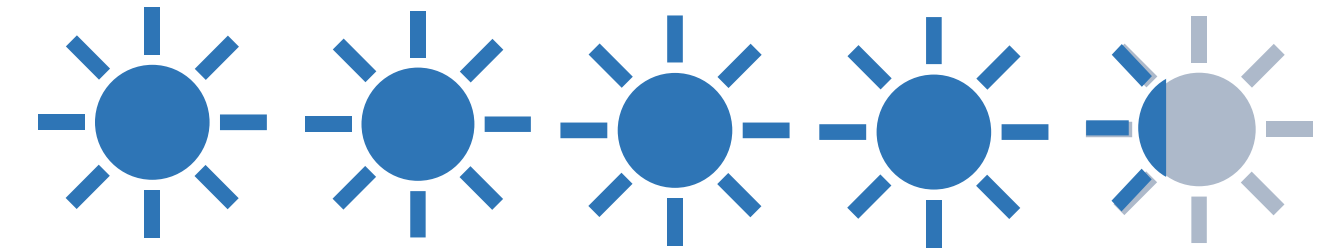
Restaurants



22%

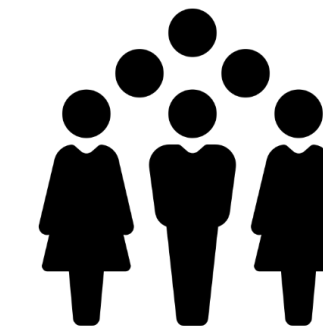
Swimming

Length of Stay



4.2 Days on Average

Travel Party Size



2.5 People

31% Traveled with Children

Daily Spending



\$164

Per Person

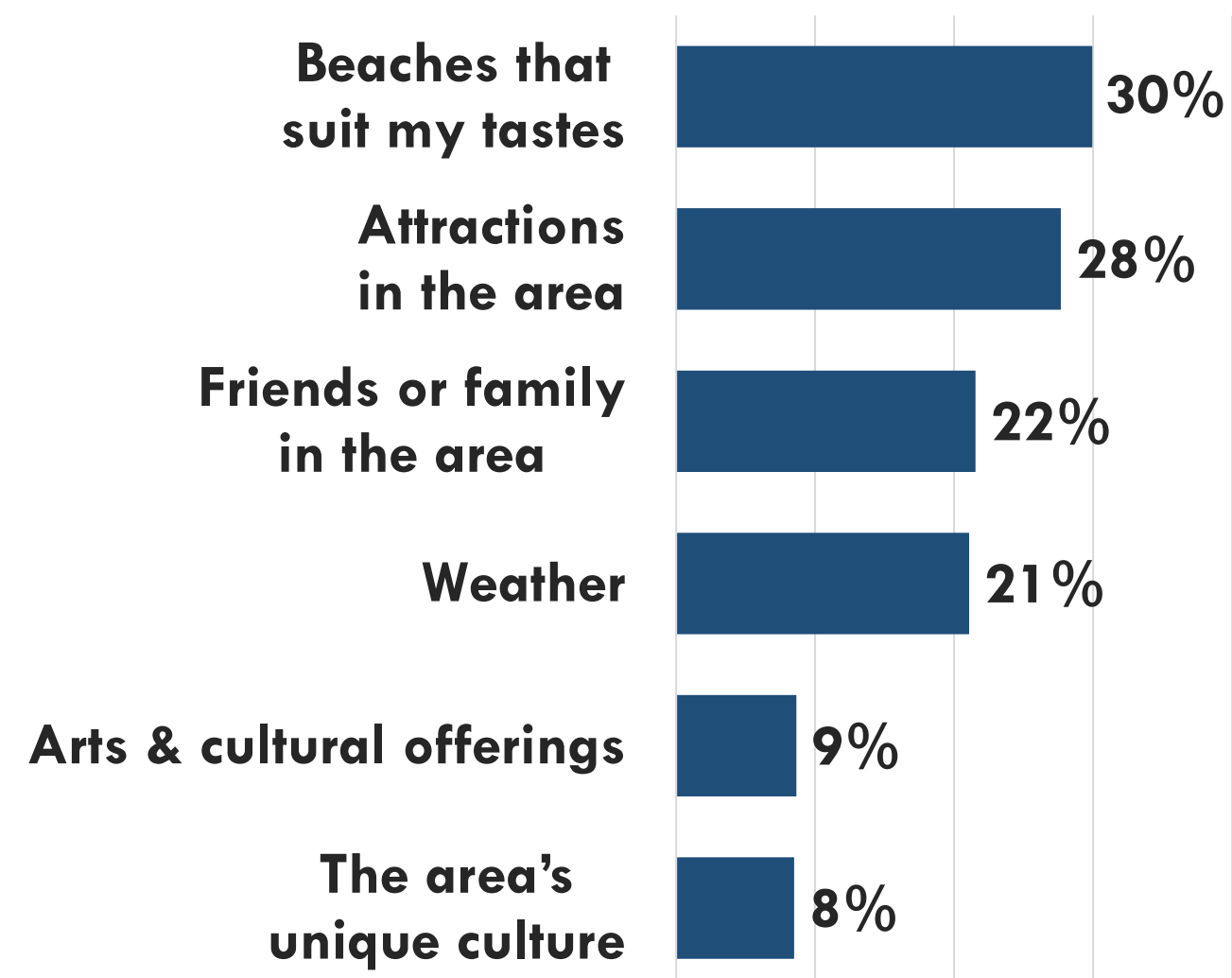


THE FAMILY TRAVELER

Q2 2023

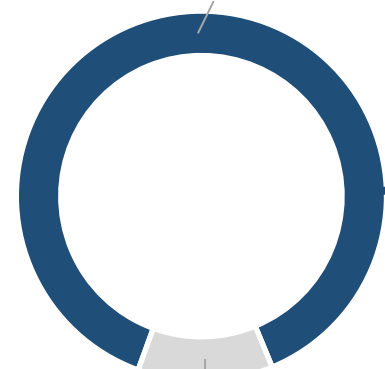
Results reflect visitors who were visiting the St. Pete/Clearwater area with children under the age of 18

Factors Important to Destination Decision



Domestic vs. International

United States Resident,
88%



International
Visitor, 12%

TOP STATES OF ORIGIN

Florida 40%
Ohio 6%
Michigan 5%

Top Communities Visited

St. Petersburg	58%
Clearwater Beach	24%
Madeira Beach	23%
St. Pete Beach	14%
Dunedin	10%

Top Activities



56%

Restaurants



41%

Beach



32%

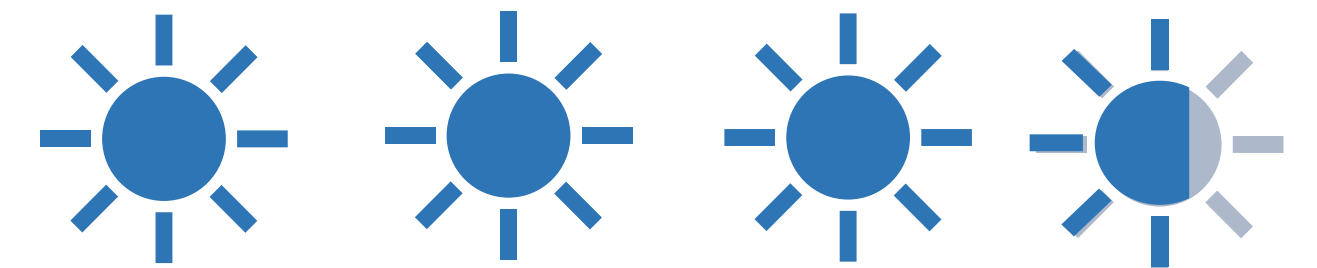
Swimming



30%

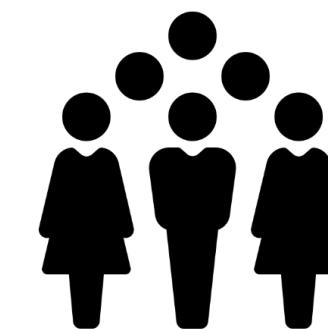
Shopping

Length of Stay



3.7 Days on Average

Travel Party Size



3.8 People

100% Traveled with Children

Daily Spending



\$103

Per Person





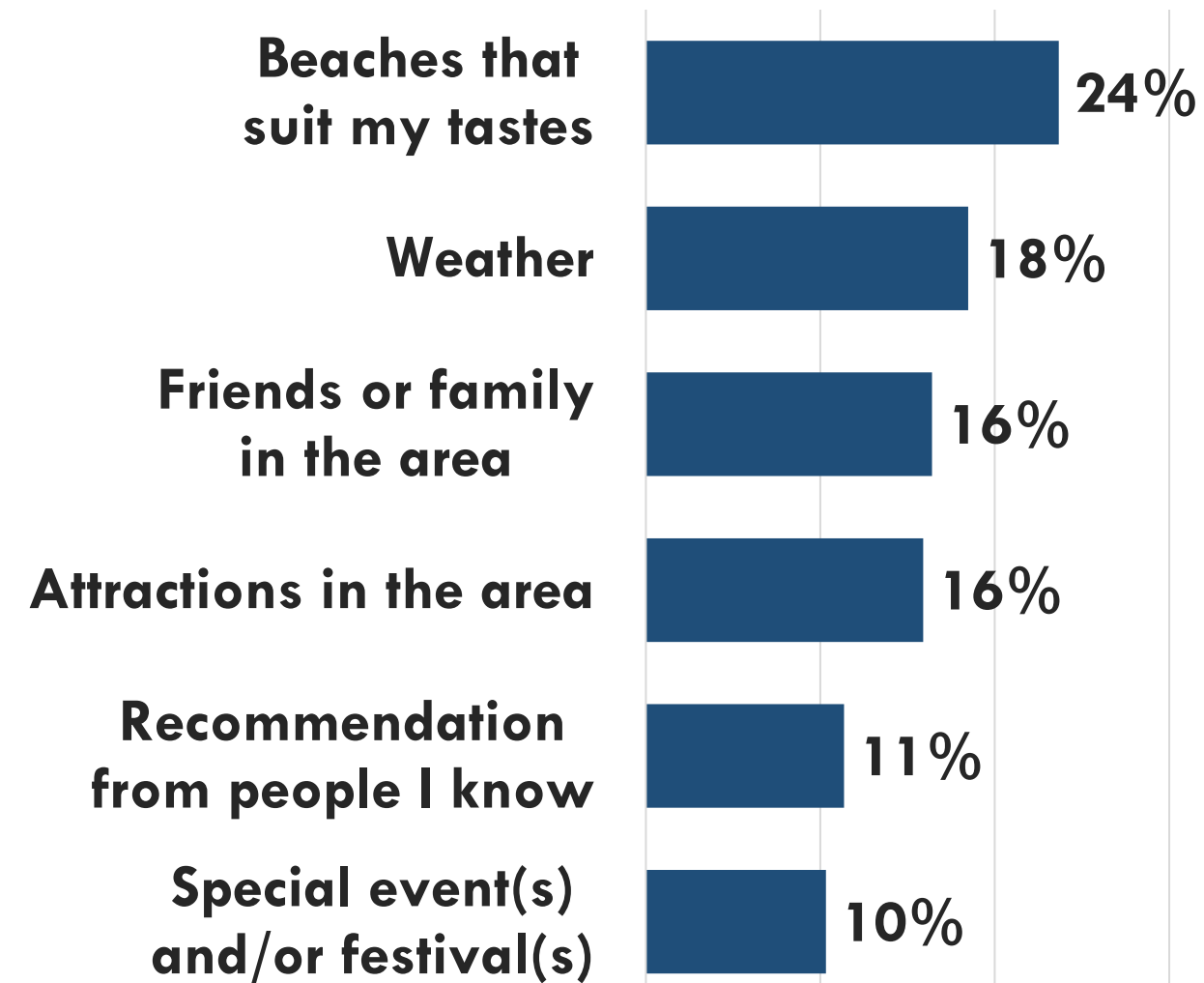
Q2 2023 Visitor Summary by Generation

THE MILLENNIAL VISITOR

Q2 2023

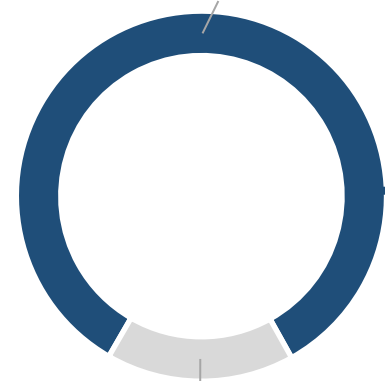
Results reflect visitors between the age of 27-42

Factors Important to Destination Decision



Domestic vs. International

United States Resident,
92%



International
Visitor, 18%

POINT OF ORIGIN: TOP STATES

Florida	5%
Ohio	6%
North Carolina	5%

Top Communities Visited

St. Petersburg	60%
Clearwater Beach	32%
Madeira Beach	22%
St. Pete Beach	17%
Treasure Island	9%

Top Activities



66%

Restaurants



45%

Beach



44%

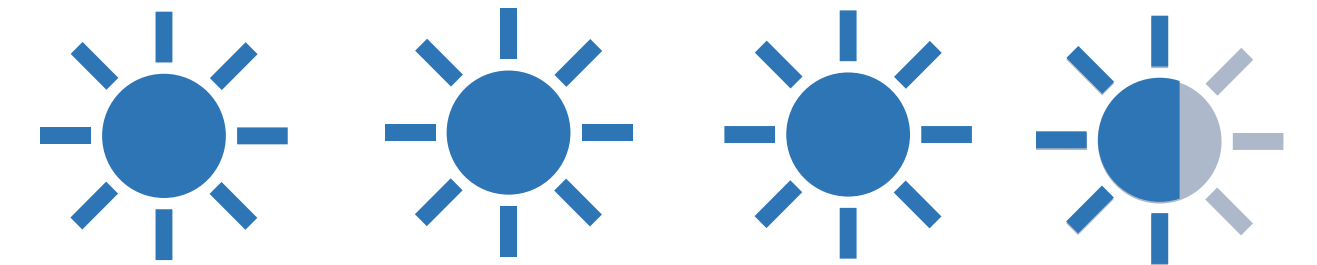
Swimming



43%

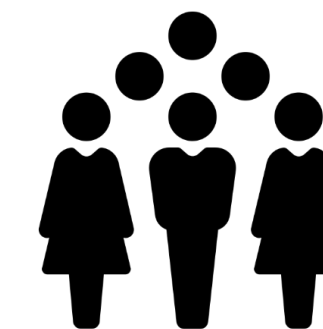
Shopping

Length of Stay



3.6 Days on Average

Travel Party Size



2.6 People

19% Traveled with Children

Daily Spending



\$146

Per Person

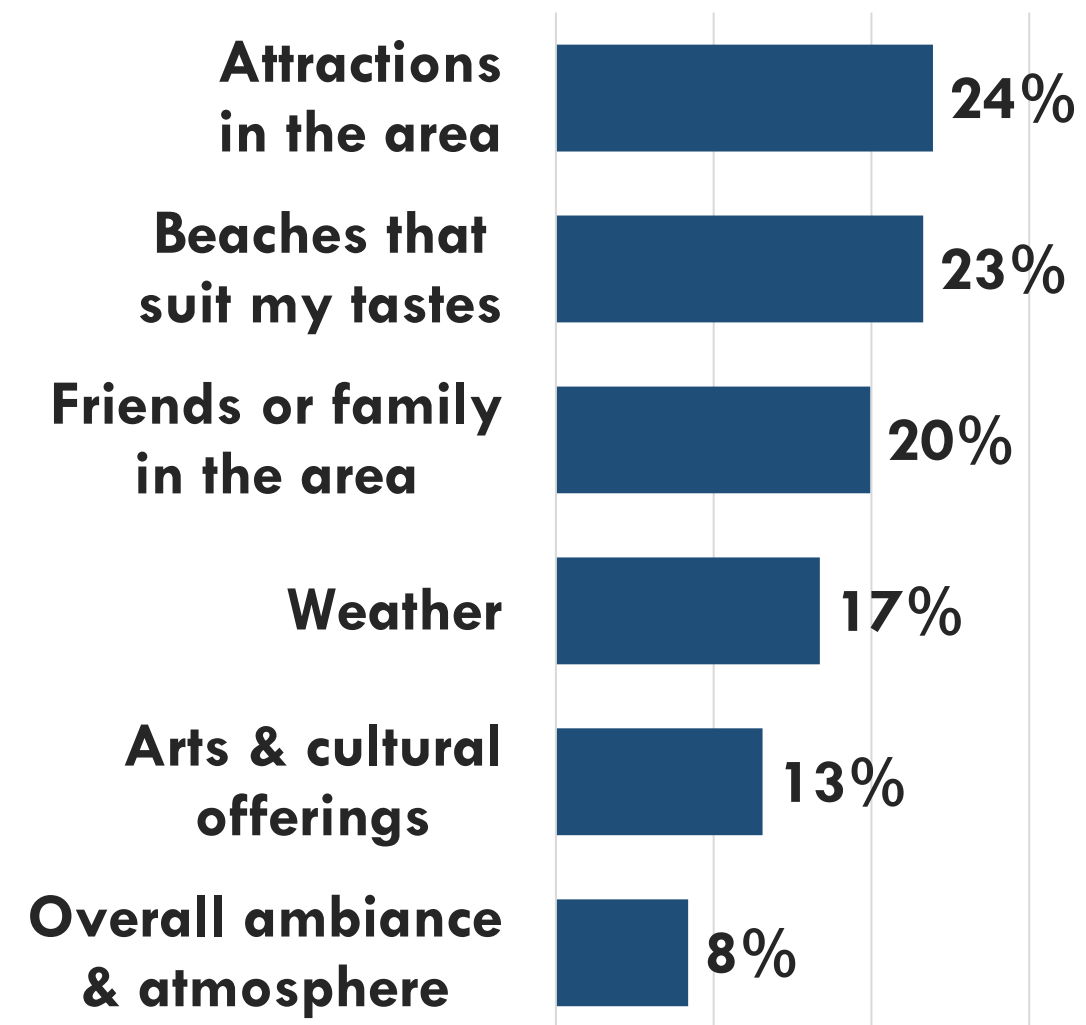


THE GEN X VISITOR

Q2 2023

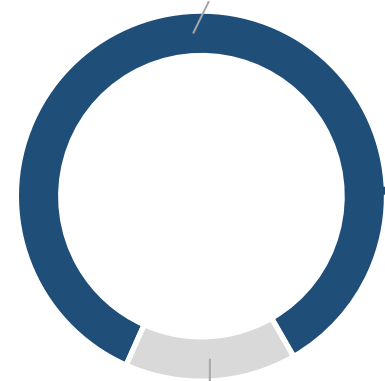
Results reflect of visitors between the age of 42-58

Factors Important to Destination Decision



Domestic vs. International

United States Resident,
85%



International
Visitor, 15%

POINT OF ORIGIN: TOP STATES

Florida	38%
Ohio	7%
Michigan	4%

Top Communities Visited

St. Petersburg	61%
Clearwater Beach	29%
Madeira Beach	19%
St. Pete Beach	12%
Dunedin	11%

Top Activities



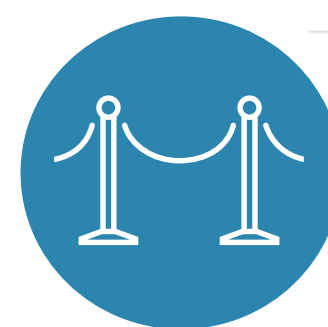
53%

Restaurants



37%

Beach



34%

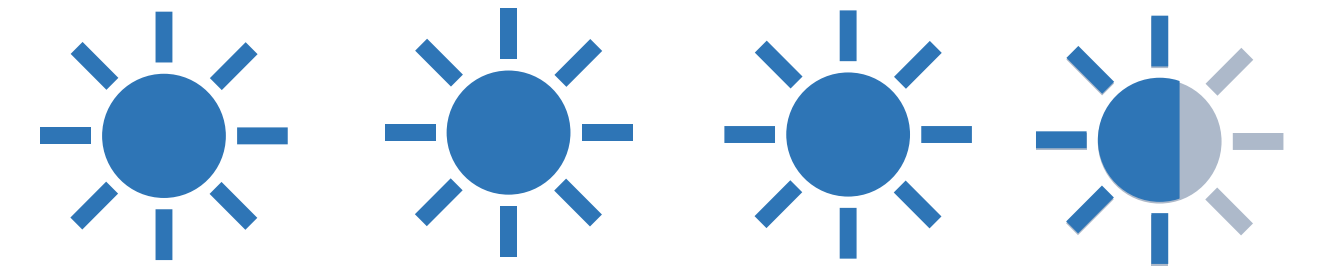
Museums



28%

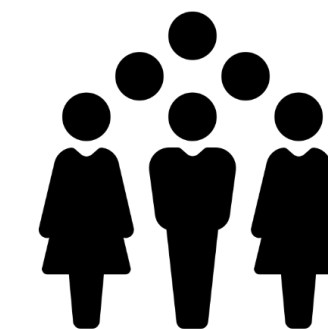
Swimming

Length of Stay



3.6 Days on Average

Travel Party Size



2.5 People

28% Traveled with Children

Daily Spending



\$138

Per Person

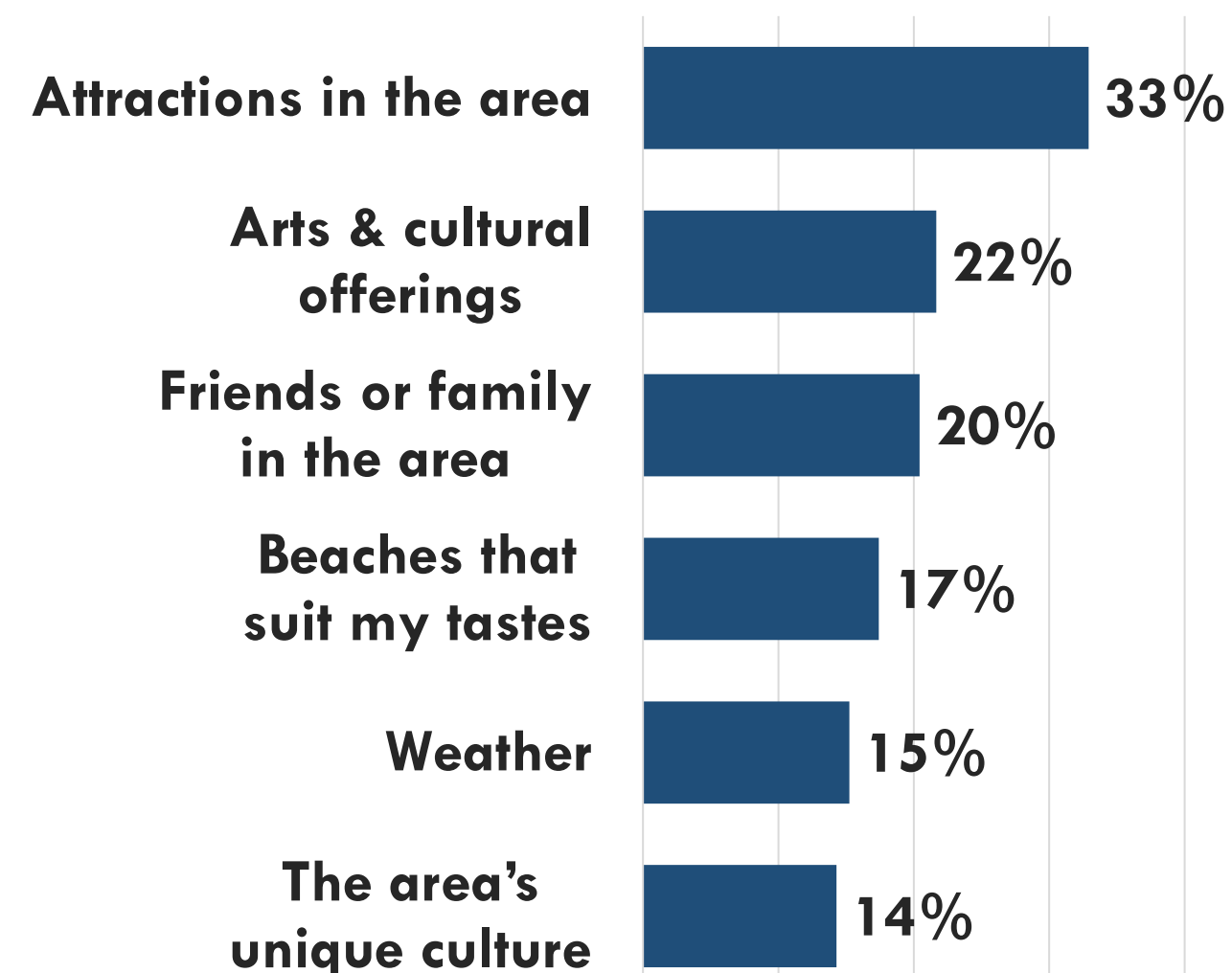


THE BABY BOOMER VISITOR

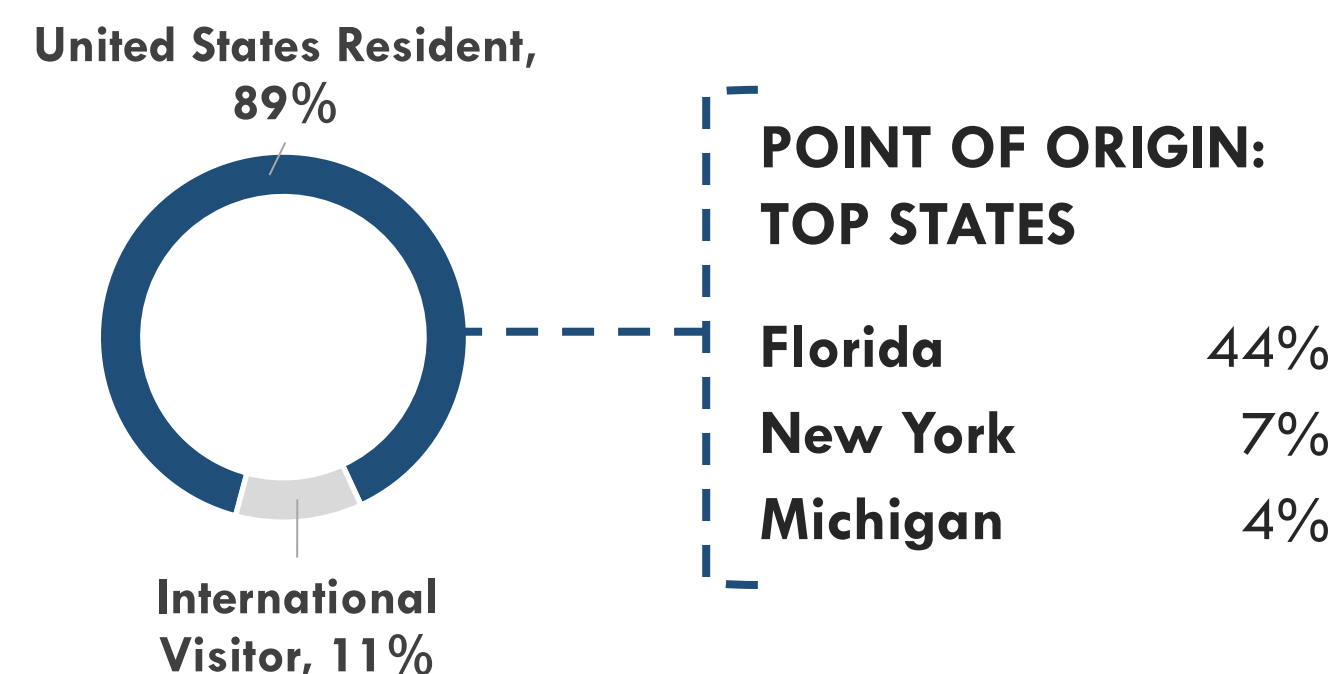
Q2 2023

Results reflect of visitors between the age of 59-77

Factors Important to Destination Decision



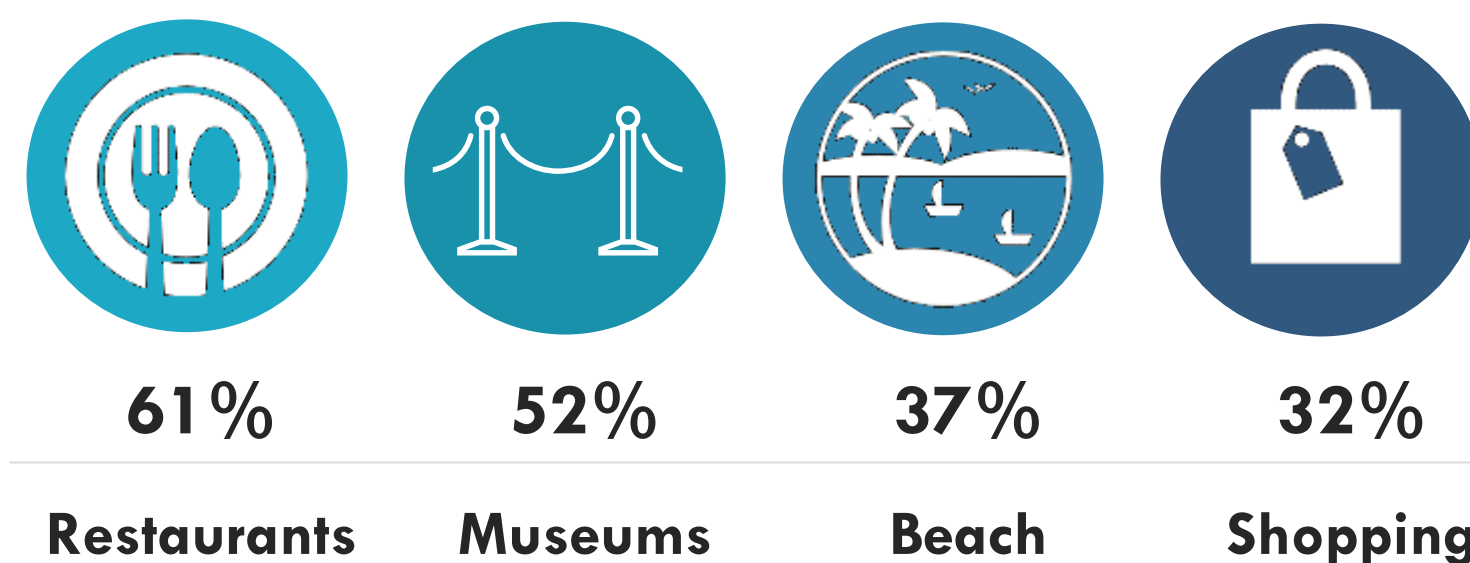
Domestic vs. International



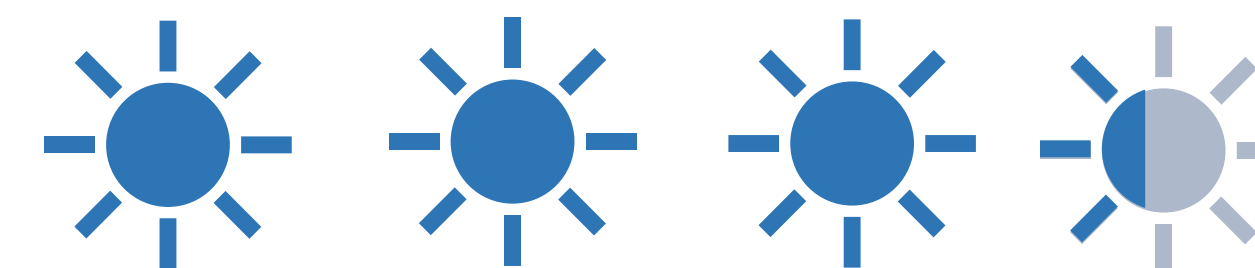
Top Communities Visited

St. Petersburg	71%
Madeira Beach	25%
Clearwater Beach	16%
St. Pete Beach	12%
Dunedin	6%

Top Activities

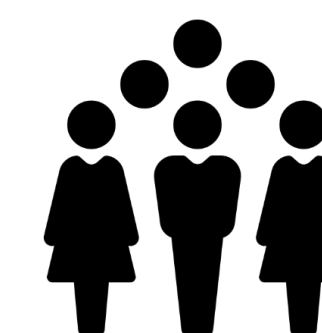


Length of Stay



3.4 Days on Average

Travel Party Size



2.3 People

5% Traveled with Children

Daily Spending



\$115
Per Person

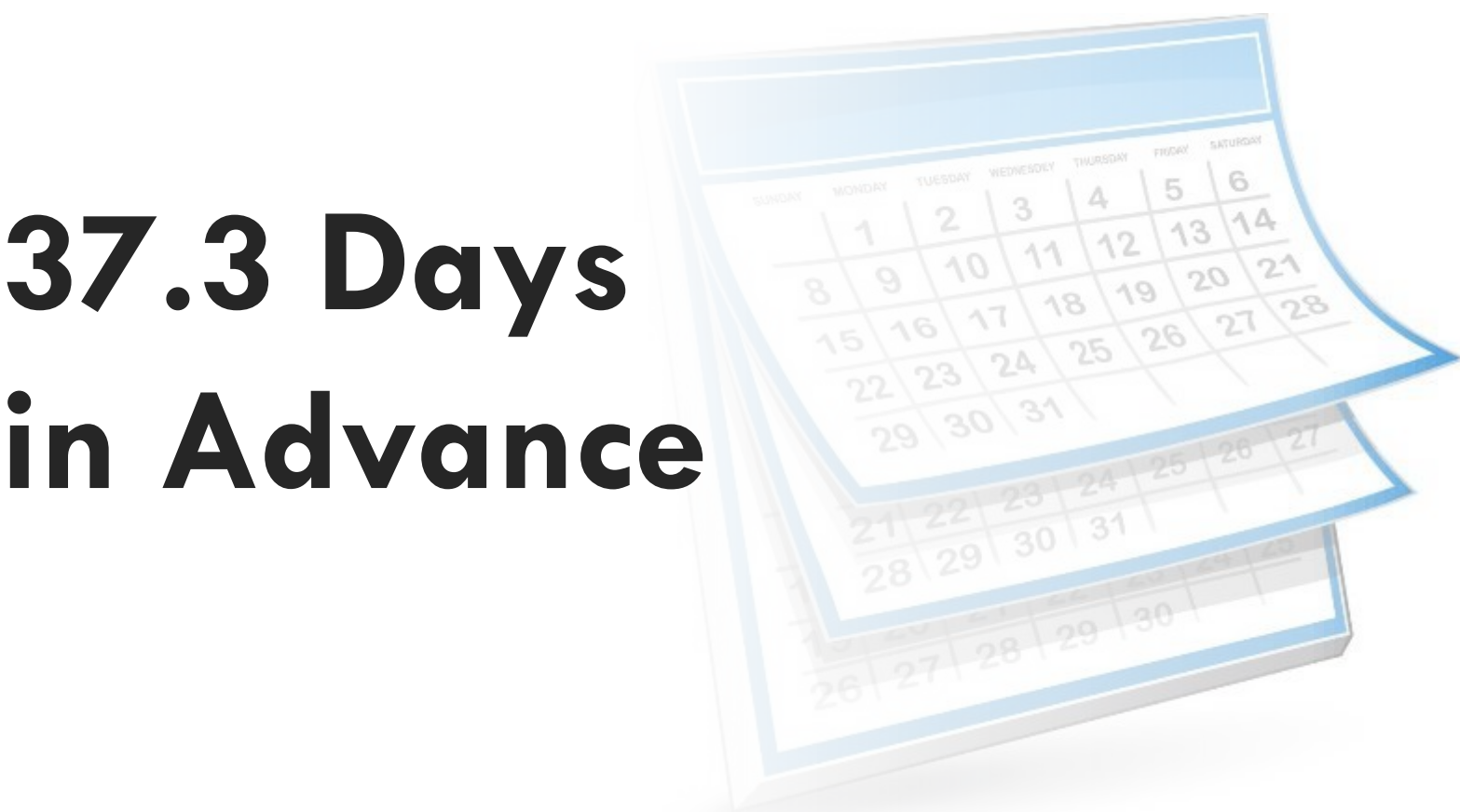
The background image shows an outdoor cafe or bar area. A large blue flag with the Florida state seal and the words 'FLORIDA REPUBLIC' and '1828' is flying from a pole. Below the flag, there are several tables and chairs. The chairs are colorful, in shades of blue, green, and yellow. People are sitting at the tables, some under yellow umbrellas. In the foreground, there are more colorful chairs on a gravel surface. A yellow curb is visible on the right side. The overall scene is a lively beachside hangout.

Planning the St. Pete/Clearwater Trip

WHEN THE DECISION TO VISIT WAS MADE

The typical St. Pete/Clearwater visitor decided to visit approximately 5.3 weeks (37.3 days) prior to their actual arrival date – down from 9.3 weeks (65.1 days) in Q2 2022. Hotel guests made the decision to visit 49.2 days in advance compared to 104.9 days in Q2 2022. VFRs decided 48.2 days in advance (down from 89.4 days in Q2 2022) and day trippers made the decision 27.4 days in advance (down from Q2 2022 with 35.0 days).

Figure 1: Average Time Between Decision to Visit and Arrival



Detail by Type of Visitor

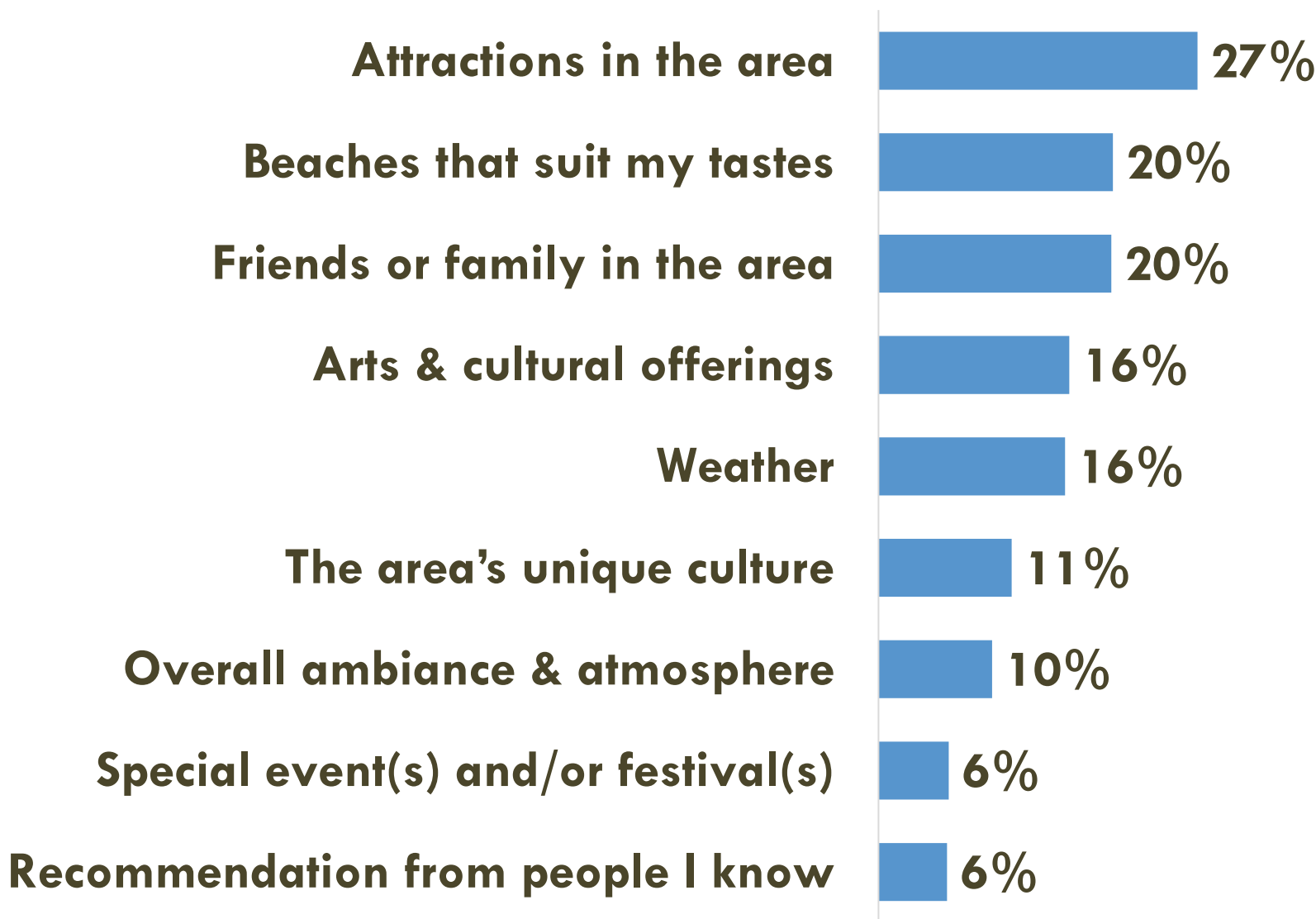
	Hotel	VFR	Day Trip
Base Size:	350	253	642
Average Days between Decision and Visit	49.2	48.2	27.4

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. 1,556 responses.

IMPORTANT FACTORS IN DESTINATION DECISION

Area attractions (27%), beaches (20%) and friends or family in the area (20%) were the top three factors important to the decision to visit. Beaches were the most important factor for hotel guests (49%), while attractions (33%) and arts & cultural offerings (20%) were the most important for day trippers.

Figure 2: Important to Decision to Visit



Question: Which of the following were IMPORTANT to your decision to take this trip to the St. Pete/Clearwater area? (Select all that apply) Base: All Respondents. 1,512 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size:	331	248	624
Attractions in the area	17%	13%	33%
Beaches that suit my tastes	49%	8%	8%
Friends or family in the area	10%	79%	20%
Arts & cultural offerings	8%	14%	20%
Weather	23%	14%	8%
The area's unique culture	6%	11%	14%
Overall ambiance & atmosphere	15%	8%	8%
Special event(s) and/or festival(s)	7%	3%	6%
Recommendation from people I know	14%	1%	2%

IMPORTANT FACTORS IN DESTINATION DECISION

Hotel guests said that Pinellas County beaches, weather, overall ambiance & atmosphere and recommendations from people they know were the most important factors when deciding to visit St. Pete/Clearwater.

Day trip visitors were the most likely to say that attractions in the area and arts & cultural offerings were important to their decision to visit Pinellas County.

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. 1,512 responses.

	Total	Hotel	VFR	Day Trip
Base Size	1,419	303	283	482
Attractions in the area	27%	17%	13%	33%
Beaches that suit my tastes	20%	49%	8%	8%
Friends or family in the area	20%	10%	79%	20%
Arts & cultural offerings	16%	8%	14%	20%
Weather	16%	23%	14%	8%
The area's unique culture	11%	6%	11%	14%
Overall ambiance & atmosphere	10%	15%	8%	8%
Special event(s) and/or festival(s)	6%	7%	3%	6%
Recommendation from people I know	6%	14%	1%	2%
St. Pete Pier	5%	1%	1%	7%
Advertisements for the area	5%	3%	1%	6%
Shopping opportunities	5%	3%	0%	6%
Easy to get to	4%	5%	0%	4%
Restaurants, cuisine, food scene	3%	2%	1%	4%
Good deal on airfare	2%	2%	0%	2%
Scenic beauty	2%	3%	2%	2%
Fishing opportunities	2%	1%	1%	2%
The St. Pete/Clearwater area is family- friendly	2%	3%	3%	2%
A specific attraction	1%	1%	0%	2%
Lifelong desire to visit	1%	2%	2%	1%
Outdoor recreational opportunities	1%	2%	0%	1%
Sports or sporting events	1%	2%	0%	1%
Appealing hotels/resorts and other lodging options	1%	5%	0%	0%
Articles, features, reviews, etc. about the area	1%	0%	0%	1%
The St. Pete/Clearwater area is romantic	0%	0%	0%	0%
Good hotel rate	0%	1%	0%	0%
Breweries/Distilleries/Craft beer scene	0%	0%	1%	0%
Life's Rewards Show on Amazon Prime	0%	0%	0%	0%
Golf	0%	0%	0%	0%

TRAVEL PLANNING RESOURCES USED

Pre-arrival, respondents cited opinions of friends or relatives and review websites as the most used travel planning resources.

Figure 3: Resources Used before Arrival and While In Market

	Used Pre-Arrival	Used In-Market
Opinions of friends or relatives	57%	21%
Review websites, (TripAdvisor, etc.)	28%	33%
Online travel agencies (Expedia, etc.)	17%	2%
Social Media content	16%	13%
YouTube or other online videos	3%	0%
Newspaper travel section	2%	1%
Travel agency (traditional, offline)	2%	1%
Travel guides, brochures	1%	9%
<u>www.VisitStPeteClearwater.com</u>	1%	3%
Lifestyle or travel magazines	1%	0%
Television programming	0%	1%
Gulf to Bay St Pete/Clearwater Magazine	0%	0%
Radio programming	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. 1,556 responses.

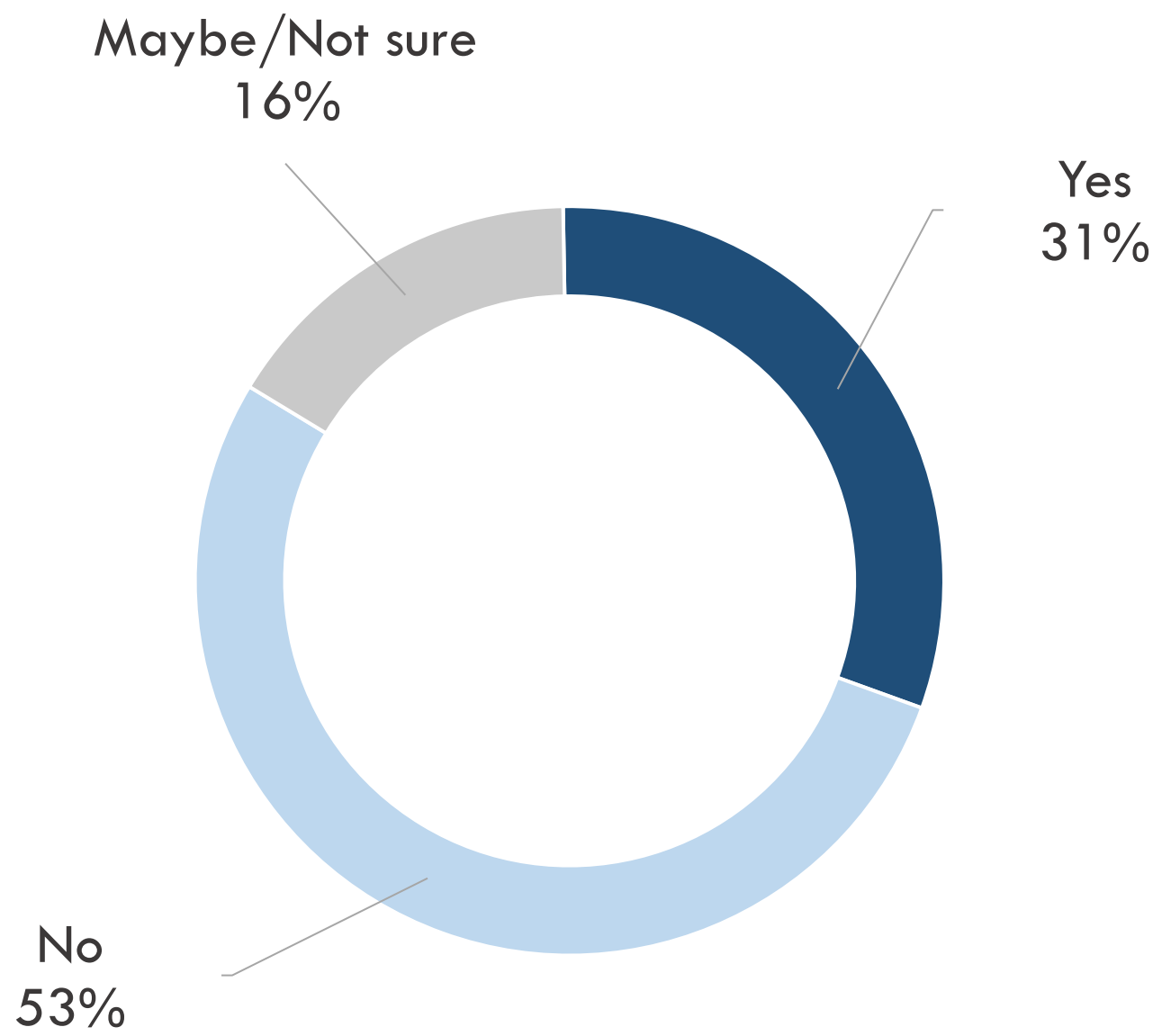
Detail by Traveler Segment

	Hotel		VFR		Day Trip	
Base Size	350		253		642	
	Pre-Arrival	In-Market	Pre-Arrival	In-Market	Pre-Arrival	In-Market
Opinions of friends or relatives	41%	20%	82%	57%	64%	19%
Review websites, (TripAdvisor, etc.)	45%	52%	16%	19%	20%	24%
Online travel agencies (Expedia, etc.)	30%	3%	6%	1%	11%	1%
Social Media content	17%	15%	7%	7%	17%	14%
YouTube or other online videos	5%	1%	1%	0%	3%	0%
Newspaper travel section	1%	2%	1%	0%	3%	1%
Travel agency (traditional, offline)	3%	1%	0%	0%	2%	1%
Travel guides, brochures	2%	14%	0%	7%	2%	6%
<u>www.VisitStPeteClearwater.com</u>	2%	5%	1%	2%	1%	1%
Lifestyle or travel magazines	0%	0%	0%	0%	1%	0%
Television programming	1%	1%	0%	1%	0%	1%
Gulf to Bay St Pete/Clearwater Magazine	0%	0%	0%	0%	0%	0%
Radio programming	0%	0%	0%	0%	0%	0%

EARNED & PAID MEDIA RECALL

About one-third of visitors surveyed in Q2 2023 recalled seeing, hearing or reading earned media for St. Pete/Clearwater in the past six months (31%).

Figure 4: Media Recall



Question: In the last six months, have you seen, read, or heard any travel stories, advertising, or promotions for the St. Pete/Clearwater area? Base: All Respondents 1,556 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	350	253	642
Yes	33%	21%	31%
No	58%	69%	50%
Maybe/Not sure	9%	10%	19%

The background image shows a bustling marina scene. In the foreground, a wooden walkway leads towards the water. To the left, a group of people is gathered on a wooden pier. In the center, several small boats are docked at a wooden pier. To the right, a large wooden building with a sign that reads "Jack's Marina" is visible. The sky is clear and blue. A teal vertical line is positioned on the left side of the image, partially obscuring the pier and the people.

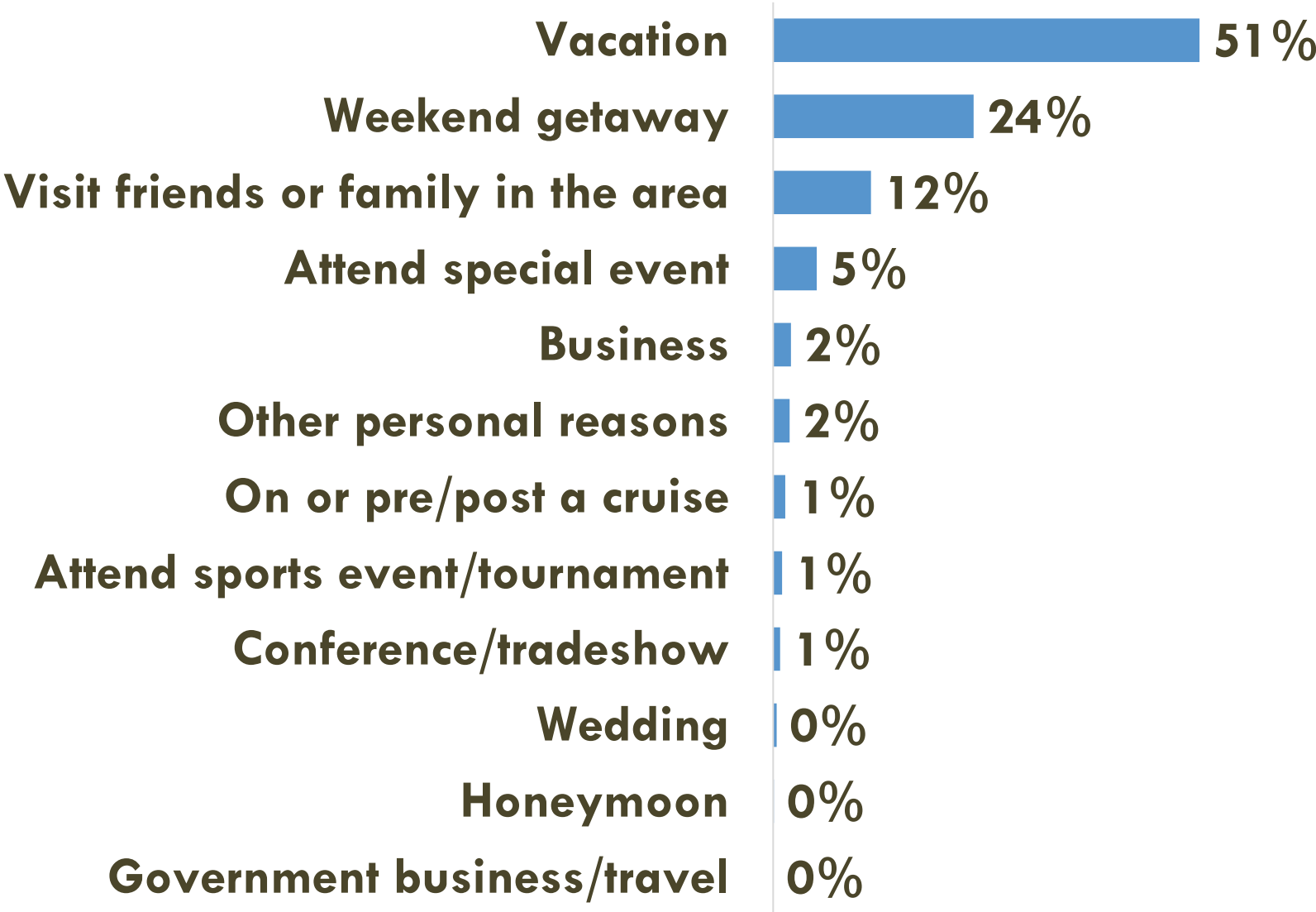
Visitor Trip Details

Jack's
AT JOHN'S PASS
BOAT & WAVERUNNER
RENTALS

PRIMARY REASON FOR VISIT

Overall, vacation was the primary reason for a visit to the St. Pete/Clearwater area in Q2 2023 (51%). 65 percent of hotel guests and 42 percent of day trippers cited vacation as their primary reason to visit.

Figure 5: Primary Reason for Visit



Detail by Traveler Segment

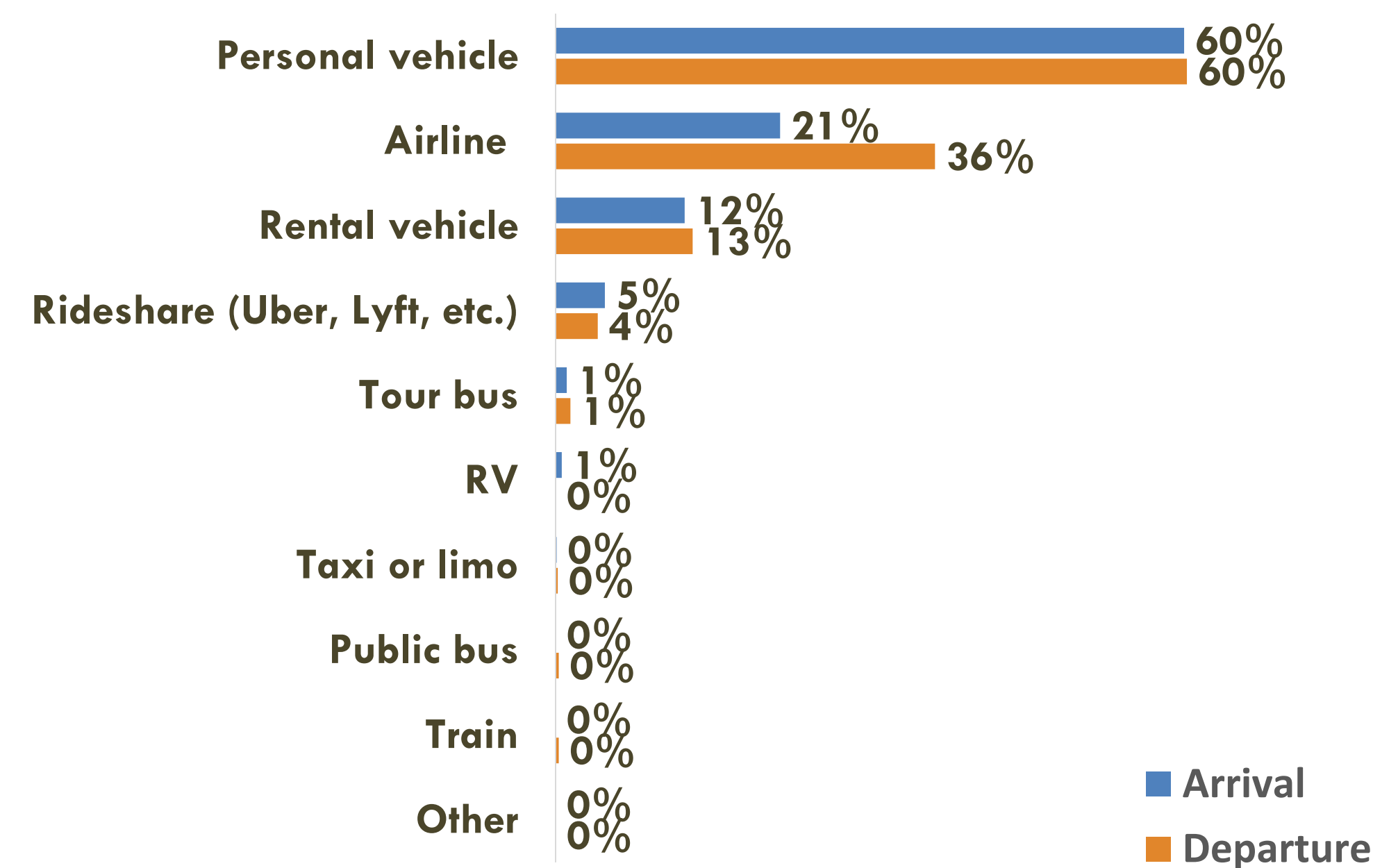
	Hotel	VFR	Day Trip
Base Size	350	253	642
Vacation	65%	37%	42%
Weekend getaway	19%	7%	29%
Visit friends or family in the area	3%	47%	13%
Attend special event	2%	2%	7%
Business	3%	1%	2%
Other personal reasons	2%	5%	2%
On or pre/post a cruise	0%	0%	2%
Attend sports event/tournament	2%	0%	1%
Conference/tradeshow	3%	1%	0%
Wedding	1%	0%	0%
Honeymoon	0%	0%	0%
Government business/travel	0%	0%	0%

Question: What is your primary reason for visiting the St. Pete/Clearwater Area? (Select one)
Base: All Respondents. 1,556 responses.

METHOD OF ARRIVAL & DEPARTURE

Preferred method of arrival in Q2 2023 continues to be personal vehicle (60%). Day trippers (71%) were the likeliest to arrive by personal vehicle. VFRs (40%) and hotel guests (38%) were likelier to arrive by airline. 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

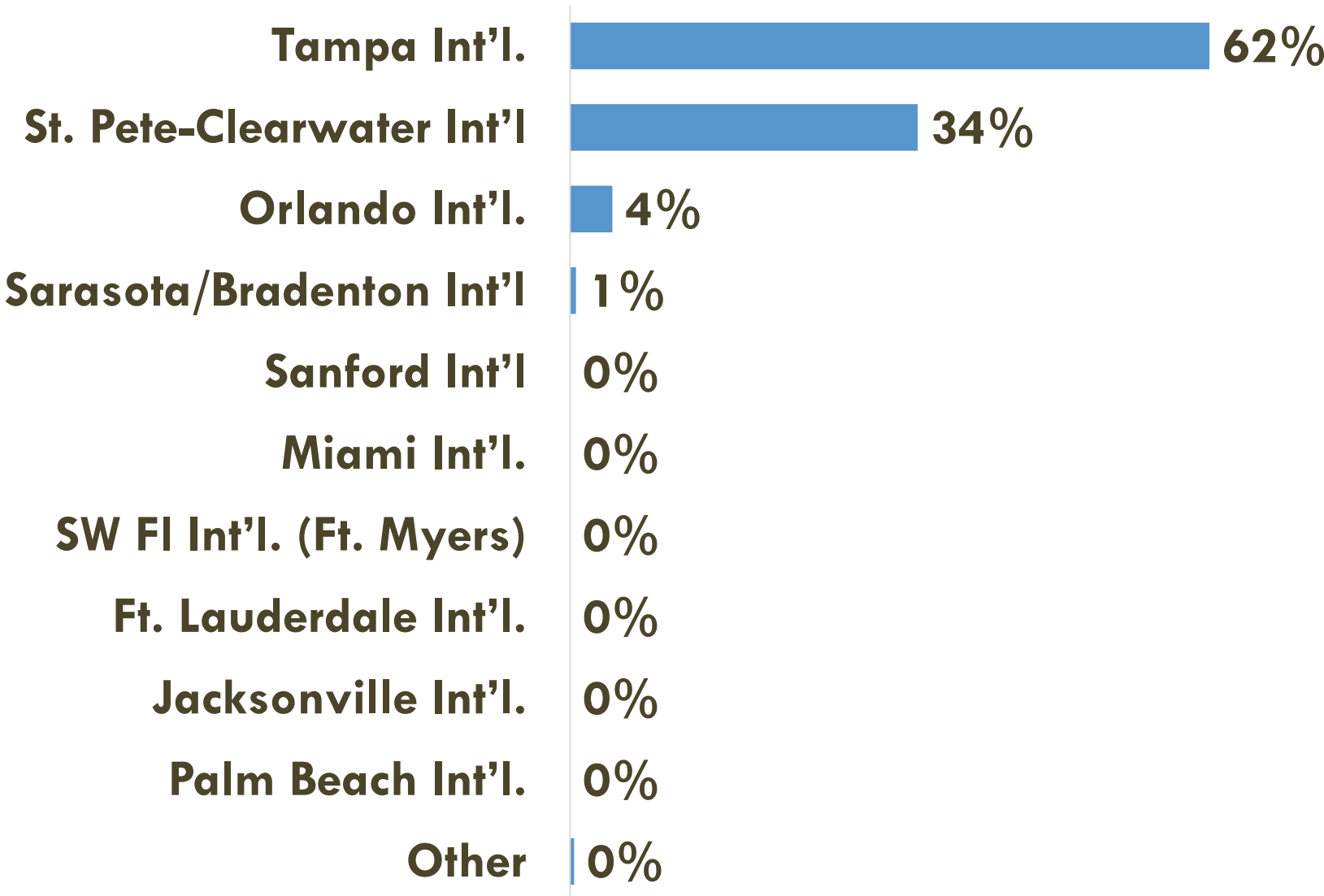
	Hotel		VFR		Day Trip	
Base Size	350		253		642	
	Arrival	Departure	Arrival	Departure	Arrival	Departure
Personal vehicle	35%	35%	50%	54%	71%	71%
Airline	38%	36%	40%	39%	12%	11%
Rental vehicle	14%	16%	3%	3%	13%	13%
Rideshare (Uber, Lyft, etc.)	13%	13%	6%	3%	3%	3%
Tour bus	0%	0%	0%	0%	2%	2%
RV	0%	0%	0%	0%	0%	0%
Taxi or limo	0%	1%	1%	1%	0%	0%
Public bus	0%	0%	0%	0%	0%	0%
Train	0%	0%	0%	0%	0%	0%
Other	0%	0%	0%	0%	0%	0%

Question: How did you arrive in the St. Pete/Clearwater area and how will you leave?
(Select all that apply) Base: All Respondents. 1,556 responses.

ARRIVAL AIRPORT

Air travelers to Pinellas County mainly arrived via Tampa International Airport (62%). 34 percent of visitors arriving by plane flew into St. Pete-Clearwater International (up from 15% in Q2 2022), and 4 percent of visitors flew into Orlando International.

Figure 7:Arrival Airport



Detail by Traveler Segment

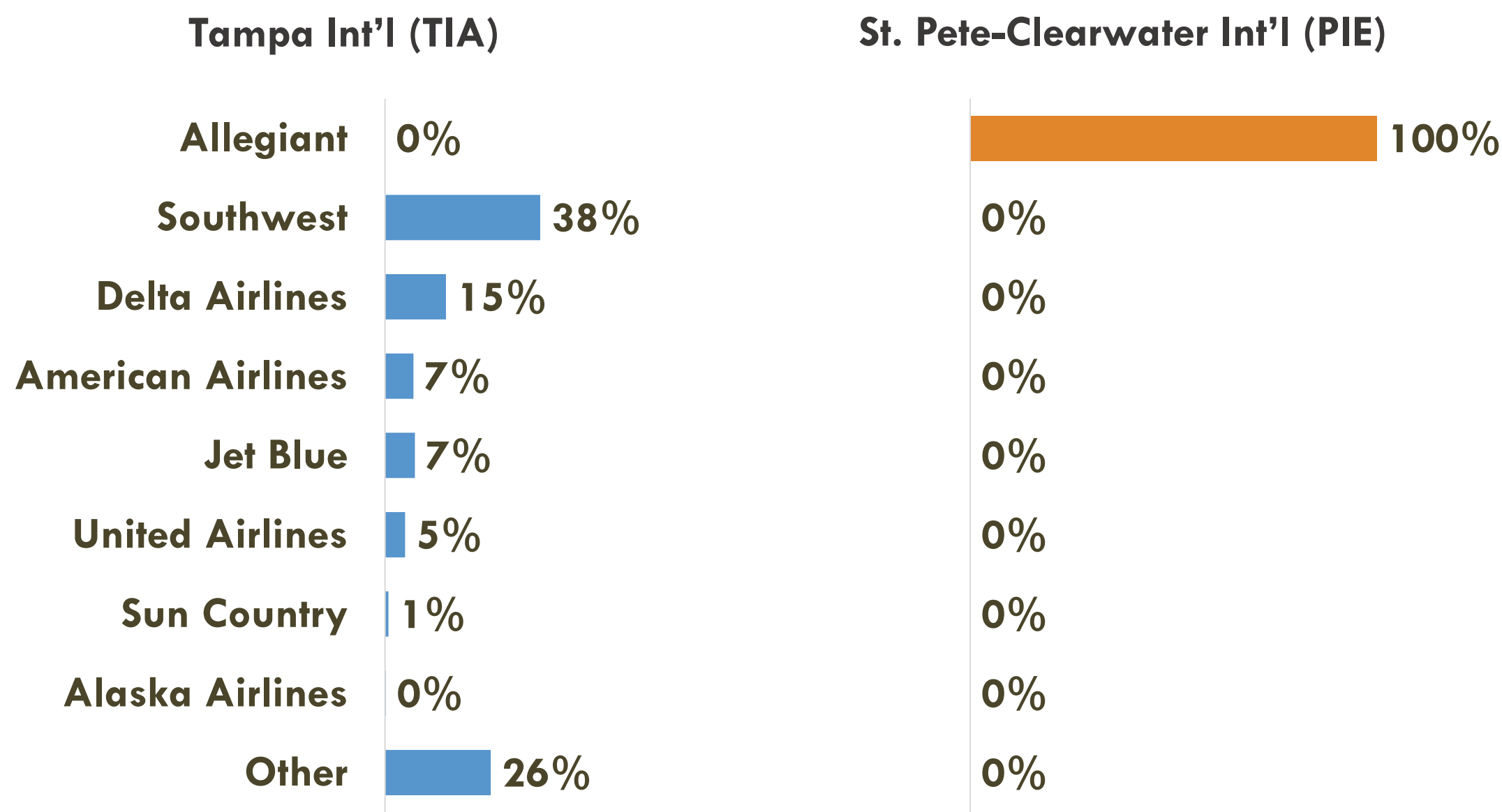
	Hotel	VFR	Day Trip
Base Size	135	99	41
Tampa Int'l.	66.6%	73.1%	47.7%
St. Pete-Clearwater Int'l	23.7%	23.8%	52.3%
Orlando Int'l.	8.9%	3.1%	0.0%
Sarasota/Bradenton Int'l	0.8%	0.0%	0.0%
Sanford Int'l	0.0%	0.0%	0.0%
Miami Int'l.	0.0%	0.0%	0.0%
SW FI Int'l. (Ft. Myers)	0.0%	0.0%	0.0%
Ft. Lauderdale Int'l.	0.0%	0.0%	0.0%
Jacksonville Int'l.	0.0%	0.0%	0.0%
Palm Beach Int'l.	0.0%	0.0%	0.0%
Other	0%	0%	0%

Question: At which airport did you arrive into the area? (Select one) Base: All Respondents who arrived in the area by airplane. 431 responses.

ARRIVAL AIRLINE (BY AIRPORT)

Pinellas County visitors who flew into St. Pete-Clearwater International in Q2 2023 arrived via Allegiant. Visitors using Tampa International Airport most commonly flew Southwest Airlines (38%), Delta Airlines (15%), American Airlines (7%) and Jet Blue (7%).

Figure 8:Arrival Airline Airport



Detail by Traveler Segment

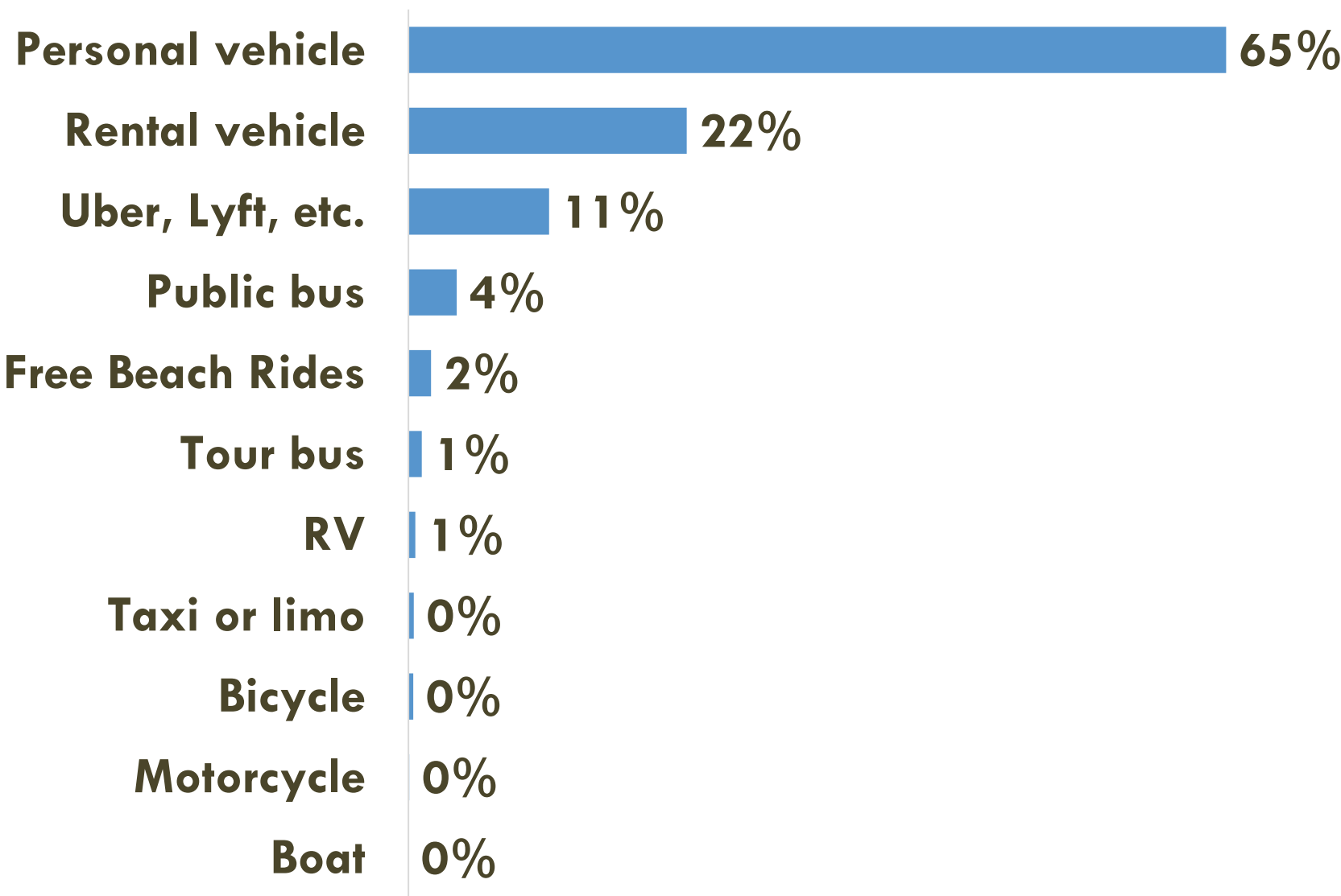
	Hotel		VFR		Day Trip	
Base Size	123		96		41	
	TIA	PIE	TIA	PIE	TIA	PIE
Allegiant	0%	100%	0%	100%	0%	100%
Southwest Airlines	38%	0%	30%	0%	30%	0%
Delta Airlines	9%	0%	18%	0%	33%	0%
American Airlines	10%	0%	14%	0%	4%	0%
Jet Blue	9%	0%	8%	0%	4%	0%
United Airlines	3%	0%	10%	0%	6%	0%
Sun Country	0%	0%	0%	0%	4%	0%
Alaska Airlines	0%	0%	0%	0%	0%	0%
Other	30%	0%	21%	0%	25%	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. 406 responses.

IN-MARKET TRANSPORTATION USED

Amongst respondents, personal vehicles (65%) and rental vehicles (22%) continued to be the most common transportation within Pinellas County. Day trippers and VFRs were the likeliest segments to use a personal vehicle as transportation (85% and 75%, respectively), while hotel guests were again the most likely to rent a vehicle (35%).

Figure 9:Transportation Used In-Market



Detail by Traveler Segment

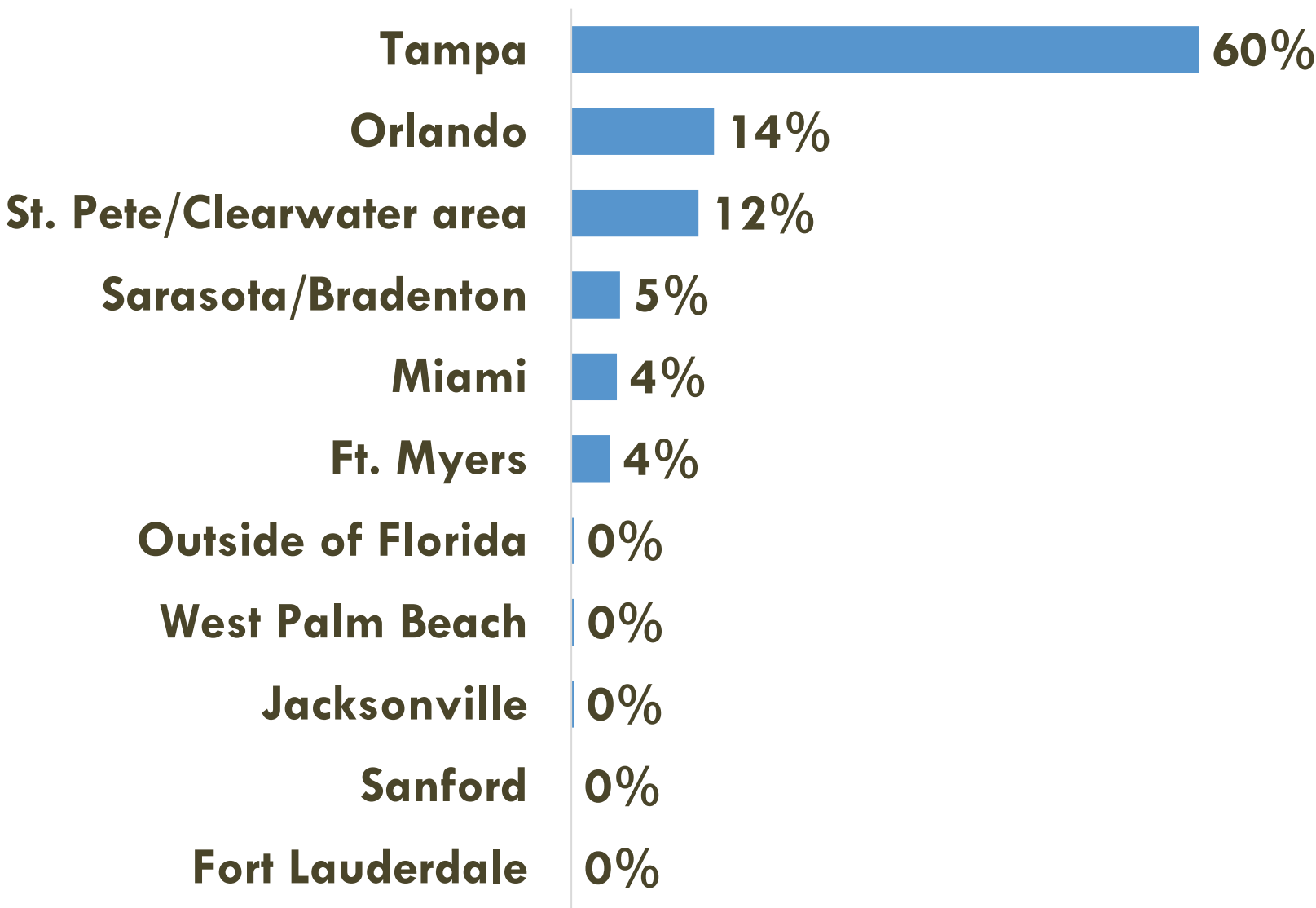
	Hotel	VFR	Day Trip
Base Size	350	253	642
Personal vehicle	37%	85%	75%
Rental vehicle	35%	9%	16%
Uber, Lyft, etc.	28%	12%	7%
Public bus	7%	10%	1%
Free Beach Rides	5%	2%	1%
Tour bus	0%	0%	2%
RV	0%	0%	0%
Taxi or limo	1%	0%	0%
Bicycle	1%	1%	0%
Motorcycle	0%	0%	0%
Boat	0%	0%	0%

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. 1,556 responses.

RENTAL VEHICLE PICK-UP LOCATION

Over half of Pinellas County visitors who arrived by rental car rented their car in Tampa (60%). 12 percent picked up their rental in St. Pete/Clearwater, an increase from 8 percent in Q2 2022.

Figure 10: Rental Vehicle Pick-Up City



Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	121	22	69
Tampa	60%	69%	54%
Orlando	16%	10%	17%
St. Pete/Clearwater area	16%	13%	9%
Sarasota/Bradenton	1%	0%	8%
Miami	5%	0%	5%
Ft. Myers	1%	0%	7%
Outside of Florida	1%	0%	0%
West Palm Beach	1%	0%	0%
Jacksonville	0%	9%	0%
Sanford	0%	0%	0%
Fort Lauderdale	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. 352 responses.

TRAVEL PARTY SIZE

Average travel groups to Pinellas County were comprised of 2.4 people. 14 percent of visitors traveled with children in Q2 2023, compared to 22 percent in Q2 2022.

Figure 11: Travel Party Size

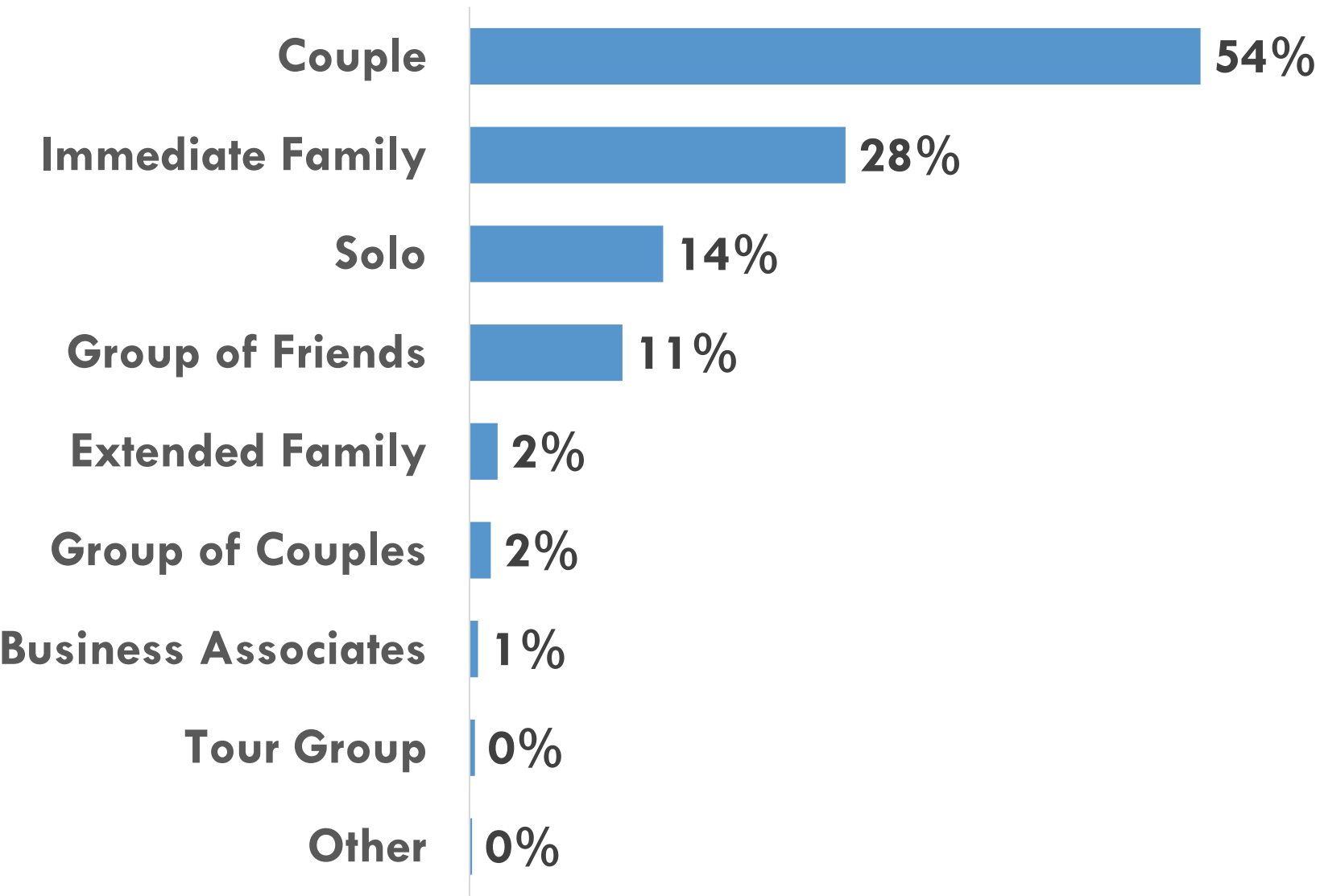
	Total	Hotel	VFR	Day Trip
Base Size	1,537	341	253	635
Male adults (18 yrs. +)	1.0	1.0	0.7	1.0
Female adults (18 yrs. +)	1.2	1.1	1.0	1.2
Male children (0 to 17 yrs.)	0.1	0.1	0.1	0.1
Female children (0 to 17 yrs.)	0.1	0.1	0.1	0.1
Average Travel Party Size	2.4	2.3	1.9	2.5
Percent with children in Party	14%	13%	10%	15%

Question: How many people of each type are in your immediate travel party, including yourself?
Base: All Respondents. 1,537 responses.

TRAVEL PARTY COMPOSITION

Over half of St. Pete/Clearwater visitors traveled as a couple (54%). In addition, 28 percent said they were traveling with immediate family, while 14 percent were traveling solo. Hotel guests and day trippers were most likely to travel as a couple (61% and 53%, respectively), while VFRs were the most likely to travel solo (44%).

Figure 12: Travel Party Composition



Detail by Traveler Segment

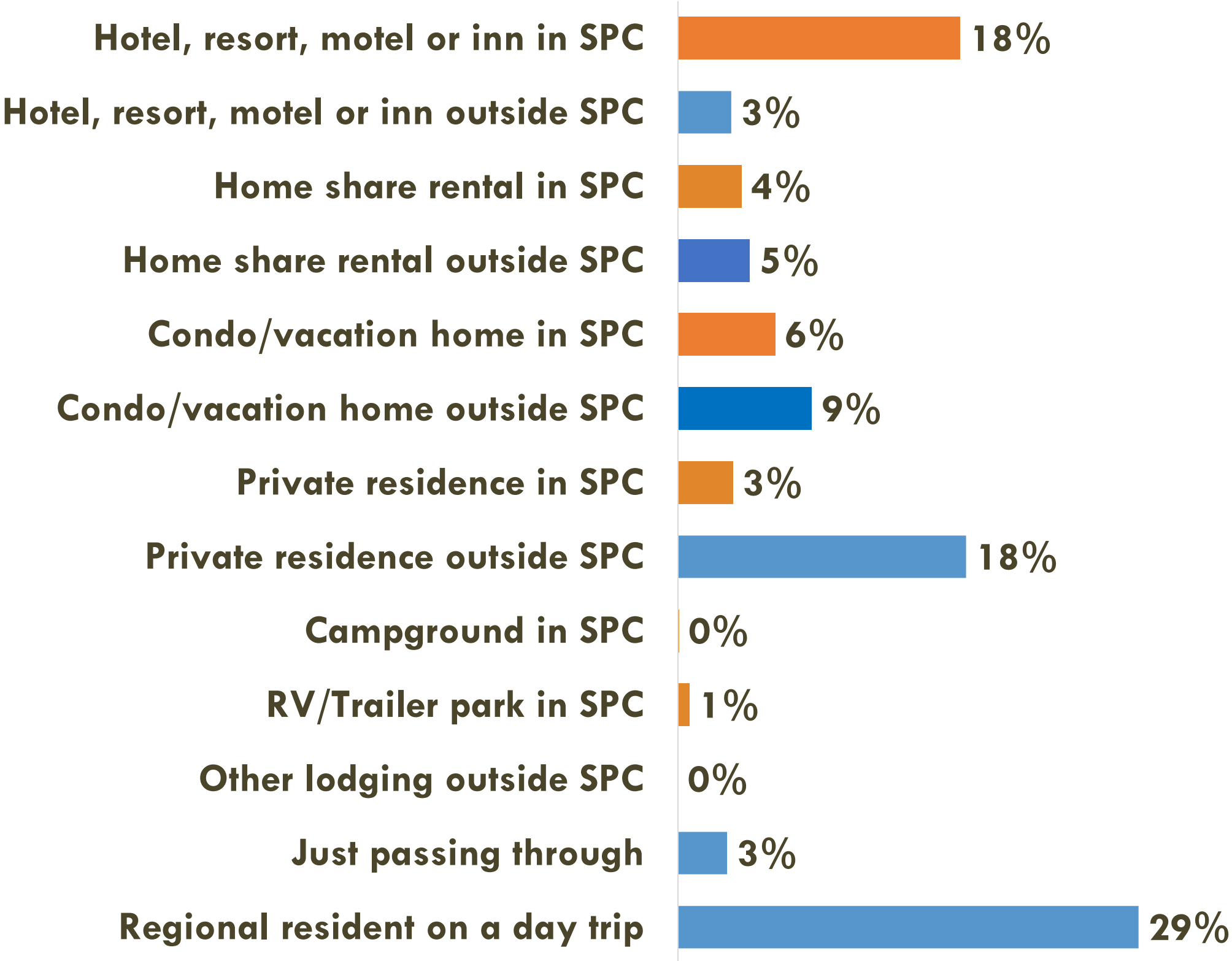
	Hotel	VFR	Day Trip
Base Size	350	253	642
Couple	61%	34%	53%
Immediate Family	21%	22%	30%
Solo	8%	44%	16%
Group of Friends	9%	8%	12%
Extended Family	2%	0%	2%
Group of Couples	2%	0%	1%
Business Associates	1%	0%	1%
Tour Group	0%	0%	0%
Other	0%	0%	0%

Question: Which best describes your travel group on this trip? Are you...? (Select all that apply)
Base: All Respondents. 1,556 responses.

LODGING TYPE

Approximately 32 percent of visitors surveyed in Q2 2023 stayed overnight in the St. Pete/Clearwater area. A large proportion of overnight visitors stayed in paid accommodations such as a hotel, resort, motel or inn (18%), home share rental (4%), or in a condo/vacation home (6%). Additionally, 3 percent stayed in the private residence of local friends or family.

Figure 13: Type of Lodging

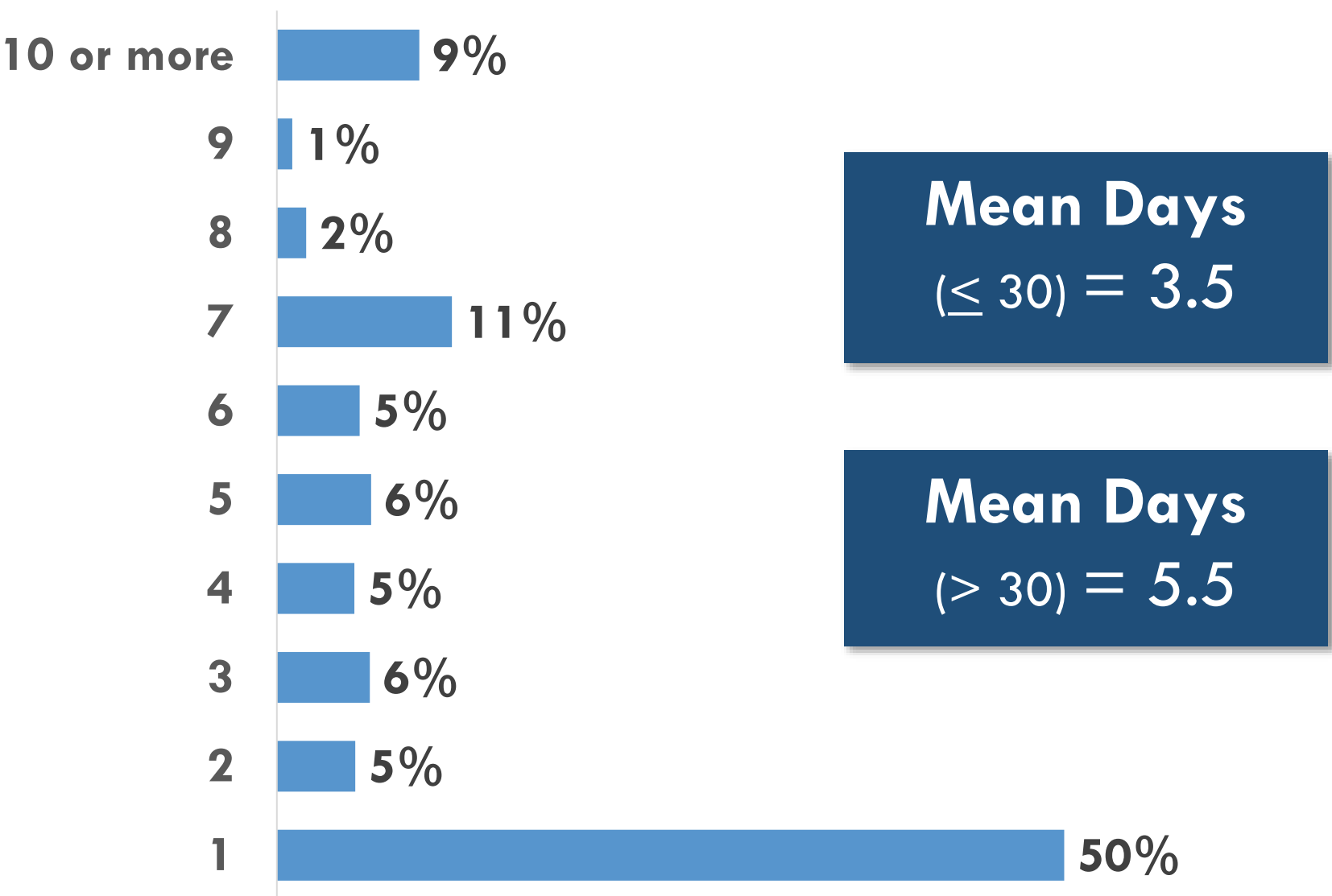


Question: Where are you staying overnight on this trip to the St. Pete/Clearwater area?
(Select one) Base: All Respondents. 1,556 responses.

DAYS SPENT IN ST. PETE/CLEARWATER

Among those staying for less than 30 days, the average visitor stayed for 3.5 days in Pinellas County (up from 2.9 days in Q2 2022). VFRs reported the longest length of stay averaging 6.3 days, followed by hotel guests with 5.1 days. Among those staying for more than 30 days, the average length of stay was 5.5 days (up from 4.1 days in Q2 2022).

Figure 14: Days in Market



Detail by Traveler Segment

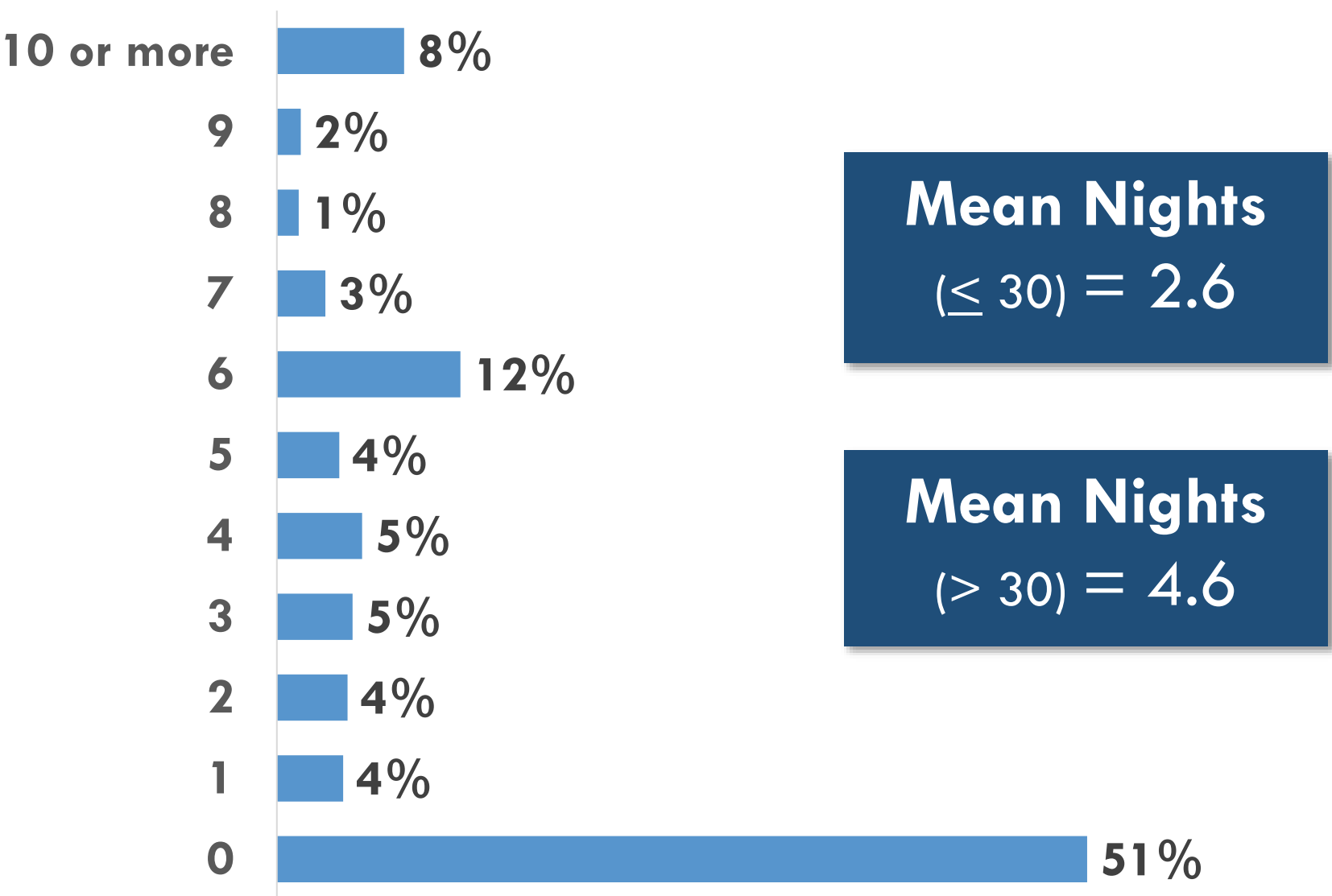
	Hotel	VFR	Day Trip
Base Size	349	235	634
10 or more	6%	19%	5%
9	1%	3%	1%
8	2%	1%	2%
7	23%	24%	3%
6	9%	10%	4%
5	10%	13%	4%
4	18%	11%	1%
3	15%	11%	3%
2	14%	4%	3%
1	1%	2%	74%
Mean Days (<30)	5.1	6.3	2.3
Mean Days (>30)	5.4	11.4	3.7

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. 1,494 responses.

NIGHTS SPENT IN ST. PETE/CLEARWATER

On average, visitors spent 3.5 nights in Pinellas County in Q2 2023 (up from 2.0 nights in Q2 2022). 14 percent spent a week or more in the destination. VFRs averaged the longest stays, with 31 percent staying 7 or more nights.

Figure 15: Nights in Market



Detail by Traveler Segment

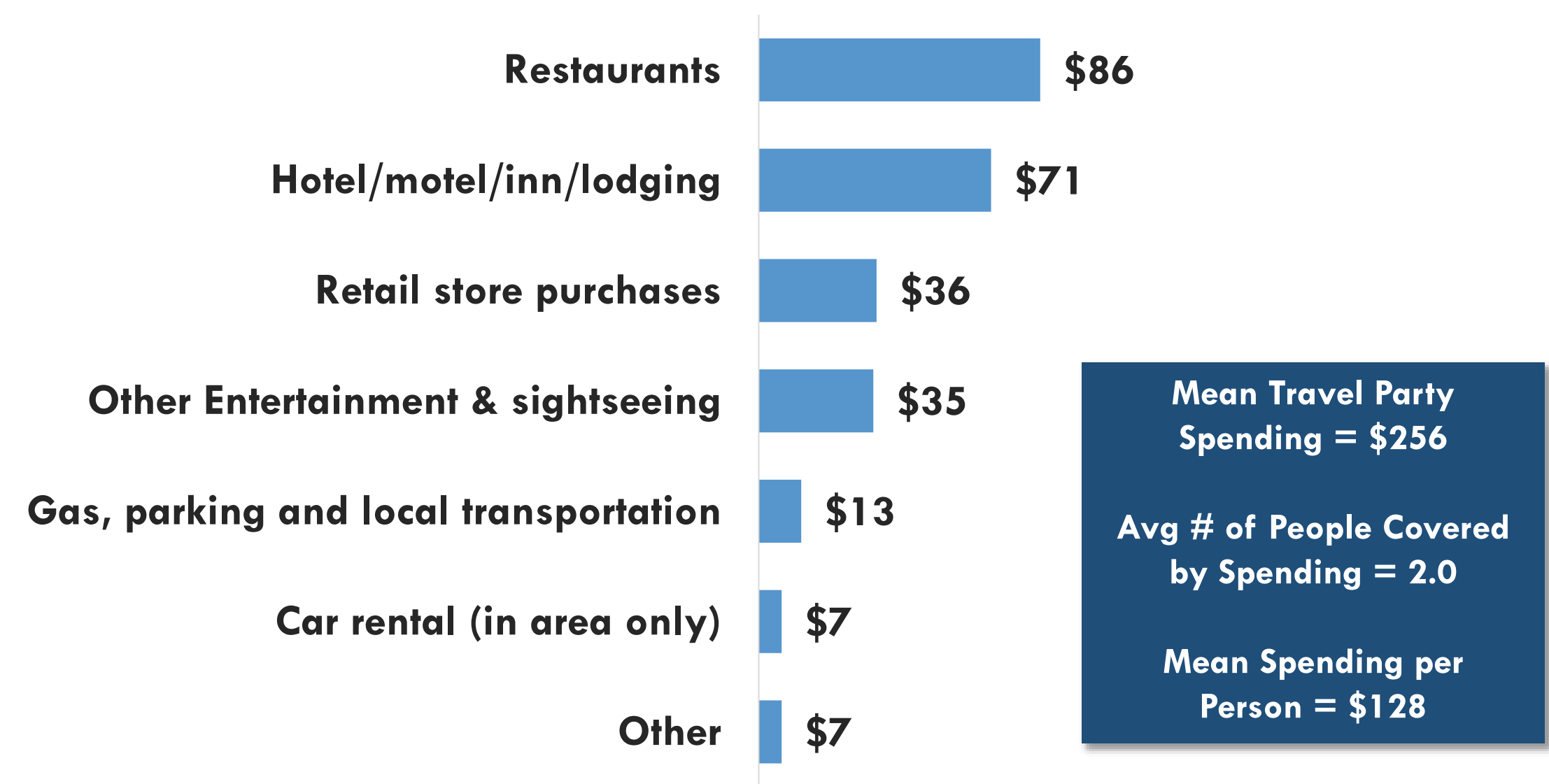
	Hotel	VFR	Day Trip
Base Size	349	235	634
10 or more	5%	18%	--
9	2%	4%	--
8	1%	2%	--
7	5%	7%	--
6	24%	22%	--
5	9%	9%	--
4	12%	13%	--
3	17%	13%	--
2	14%	7%	--
1	12%	3%	--
0	0%	2%	100%
Mean Nights (<30)	4.3	5.6	--
Mean Nights (>30)	4.7	11.0	--

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. 1,494 responses.

DAILY SPEND IN-MARKET

St. Pete/Clearwater visitors spent an average of \$256 per travel party. The average visitor represented \$128 in daily spending. Hotel guests reported the highest spending, averaging \$462 per travel party, with \$235 spent per day on accommodations.

Figure 16: Per Day Travel Party Spending



Detail by Traveler Segment

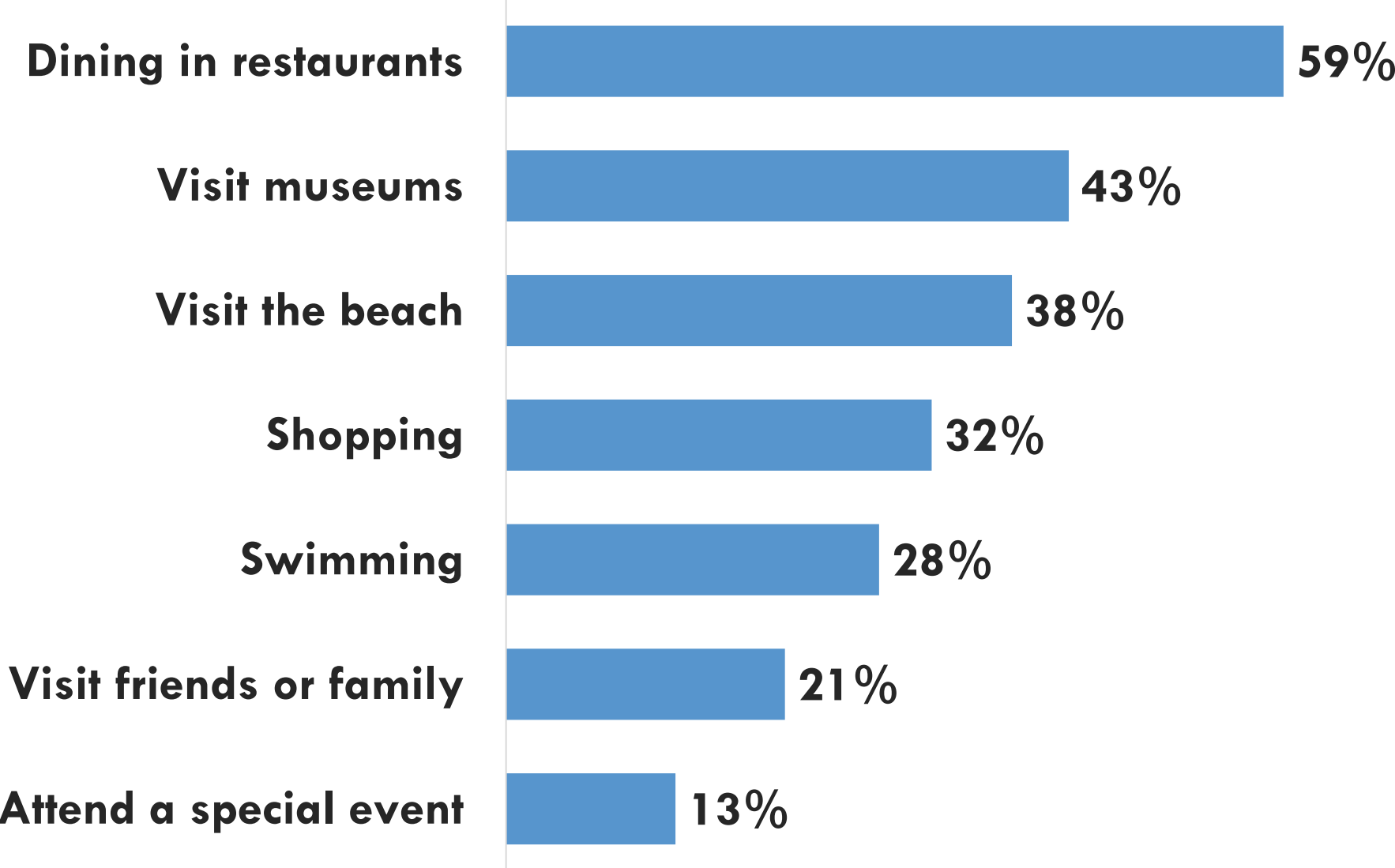
	Hotel	VFR	Day Trip
Base Size	350	251	631
Restaurants	\$115	\$71	\$77
Hotel/motel/inn/lodging	\$235	\$1	\$19
Retail store purchases	\$45	\$36	\$33
Other Entertainment & sightseeing	\$29	\$19	\$40
Gas, parking and local transportation	\$14	\$7	\$13
Car rental (in area only)	\$15	\$4	\$3
Other	\$9	\$8	\$6
Mean Spending per Travel Party	\$462	\$146	\$190
# of People Covered by Spending	2.1	1.6	2.0
Mean Spending per Person	\$222	\$92	\$96

Question: PER DAY, approximately how much will you spend on each of the following while in the St. Pete/Clearwater area? Base: All Respondents. 1,543 responses.

TRIP ACTIVITIES

The St. Pete/Clearwater trip primarily included dining in restaurants (59%), visiting a museum (43%) or going to the beach (38%). Additionally, visitors went shopping (32%), swimming (28%), saw family or friends (21%) or attended a special event (13%).

Figure 17: Trip Activities



Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	350	253	642
Dining in restaurants	76%	70%	50%
Visit museums	26%	40%	49%
Visit the beach	74%	50%	22%
Shopping	47%	41%	22%
Swimming	52%	37%	14%
Visit friends or family	12%	73%	21%
Attend a special event	13%	13%	13%

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. 1,556 responses.

TRIP ACTIVITIES

Hotel guests and VFRs were the likeliest to have dined in a restaurant (76% and 70%, respectively), visited the beach (74% and 50%, respectively), shopping (47% and 41%, respectively) and swimming (52% and 37%, respectively).

Day trip visitors were the likeliest segment to have visited a museum (49%).

	Total	Hotel	VFR	Day Trip
Base Size	1,556	350	253	642
Dining in restaurants	59%	76%	70%	50%
Visit museums	43%	26%	40%	49%
Visit the beach	38%	74%	50%	22%
Shopping	32%	47%	41%	22%
Swimming	28%	52%	37%	14%
Visit friends or family	21%	12%	73%	21%
Attend a special event	13%	13%	13%	13%
Bars/Nightlife	9%	22%	18%	2%
Other boating	8%	13%	5%	5%
Fishing	5%	4%	7%	4%
Jet skiing	4%	4%	3%	3%
Attend/participate in sporting event	3%	5%	1%	2%
Biking	3%	2%	2%	2%
Take a dining cruise	2%	4%	1%	1%
Sailing	2%	1%	1%	2%
Shelling	2%	3%	1%	1%
Photography	1%	2%	2%	1%
Golf	1%	1%	2%	1%
Visit breweries and/or distilleries	1%	2%	5%	0%
Guided tour	1%	2%	0%	1%
Bird watching	1%	1%	0%	1%
Parasailing	1%	1%	0%	0%
Kayaking/Canoeing	0%	0%	0%	0%
Baseball Spring Training	0%	1%	0%	0%
Paddle boarding	0%	1%	1%	0%

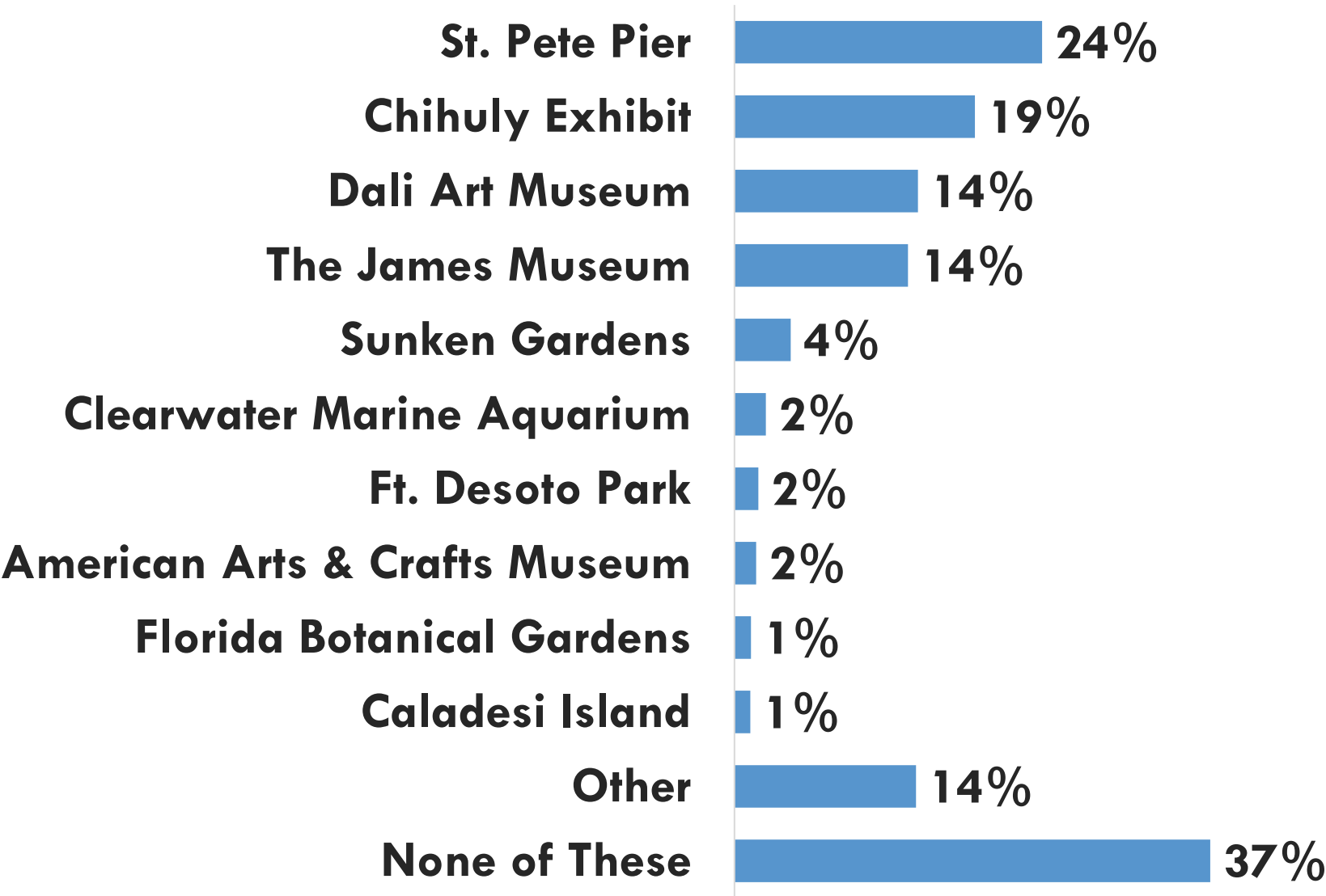
Question: Which of these activities did you, or will you, participate in while in the St. Pete/Clearwater area?
(Select all that apply)

Base: All Respondents. 1,556 responses.

Attractions Visited

In line with Q2 2022, the top visitor attractions were the St. Pete Pier (24%), the Chihuly Exhibit (19%), and the Dali Art Museum (14%). VFRs were the most likely to have visited the St. Pete Pier (37%) and the Dali Art Museum (20%).

Figure 18:Attractions Visited



Detail by Traveler Segment

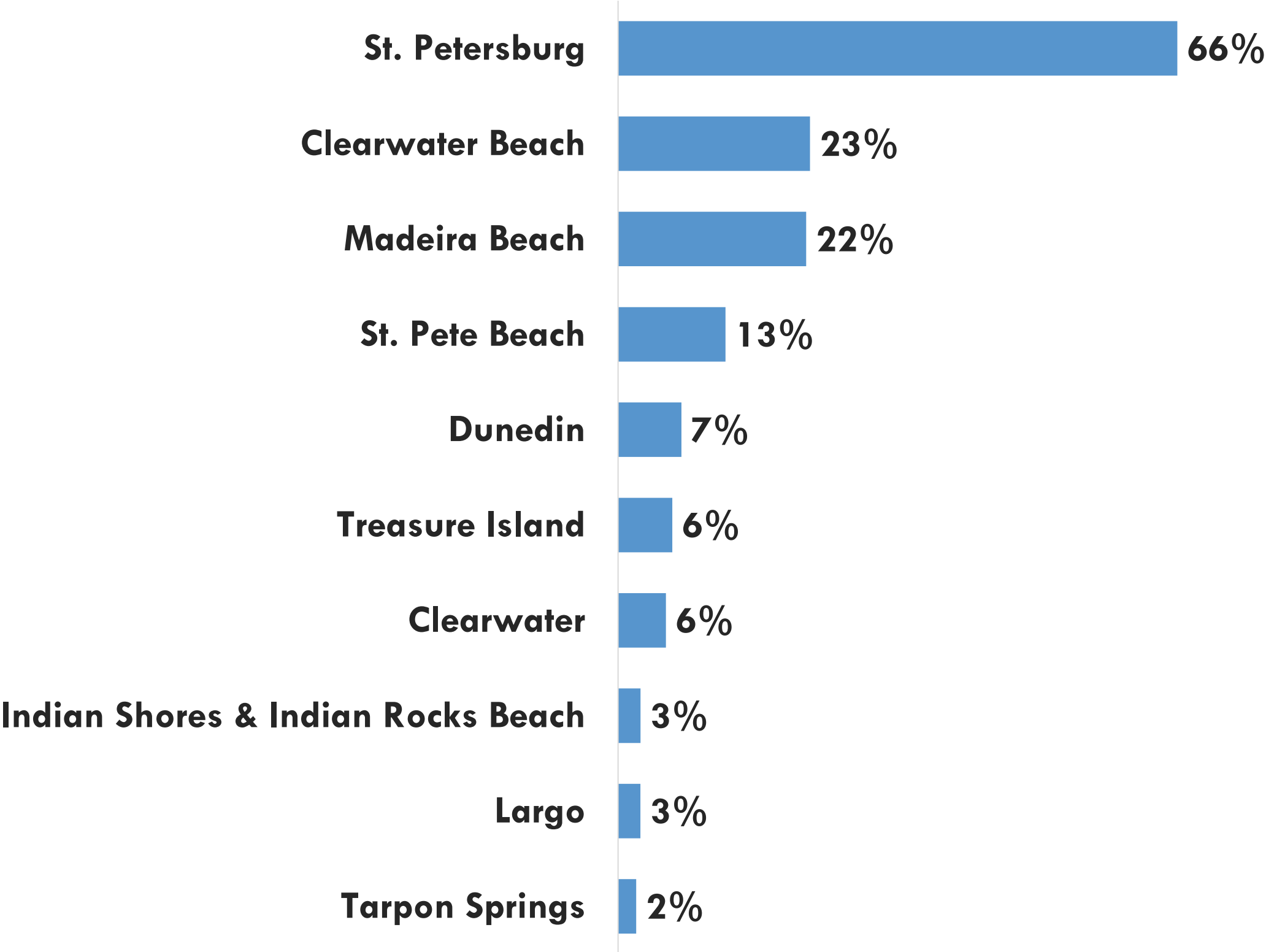
	Hotel	VFR	Day Trip
Base Size	341	284	494
St. Pete Pier	30%	37%	20%
Chihuly Exhibit	14%	22%	20%
Dali Art Museum	13%	20%	14%
The James Museum	7%	14%	17%
Sunken Gardens	4%	7%	4%
Clearwater Marine Aquarium	6%	2%	1%
Ft. Desoto Park	1%	2%	1%
American Arts & Crafts Museum	2%	4%	2%
Florida Botanical Gardens	1%	3%	1%
Caladesi Island	1%	0%	1%
Other	11%	20%	15%
None of These	47%	33%	35%

Question: Which of these attractions did you (or will you) visit while on this trip? (Select all that apply) Base: All Respondents. 1,556 responses.

COMMUNITIES VISITED

Visitors to St. Pete/Clearwater most commonly frequented St. Petersburg (66%), Clearwater Beach (23%), Madeira Beach (22%), St. Pete Beach (13%) and/or Dunedin (7%).

Figure 19: Top Communities Visited



Question: Which of the following communities in the St. Pete/Clearwater area did you visit? (Show list. Select all that apply) Base: All Respondents. 1,556 responses.

COMMUNITIES VISITED

Day trippers and VFRs were the most likely to have visited St. Petersburg (73% and 62%, respectively).

Hotel guests were the most likely to have visited Clearwater Beach (44%) and St. Pete Beach (25%) in Q2 2023.

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

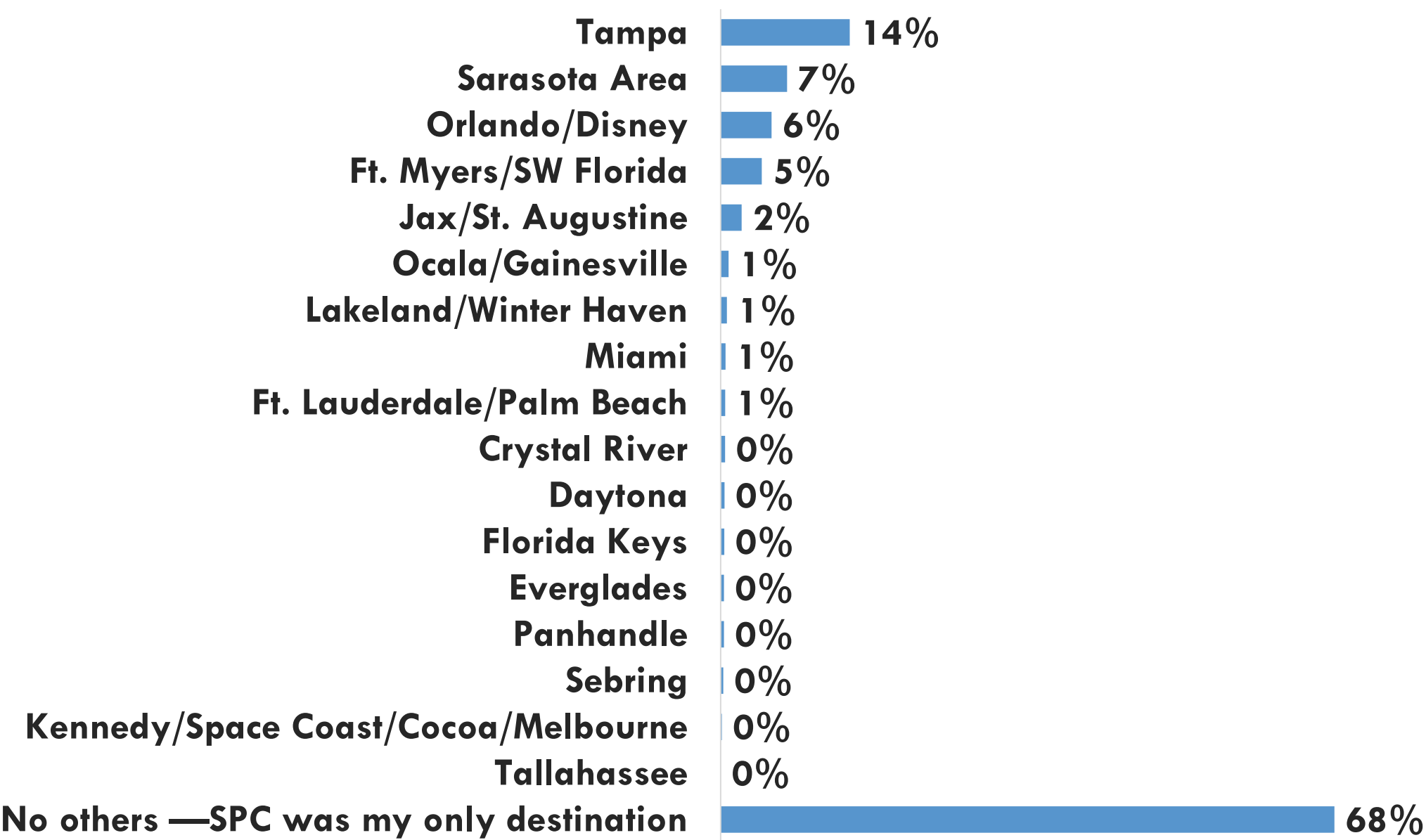
Base: All Respondents. 1,556 responses.

	Total	Hotel	VFR	Day Trip
Base Size	1,556	350	253	642
St. Petersburg	66%	47%	62%	73%
Clearwater Beach	23%	44%	22%	15%
Madeira Beach	22%	26%	29%	15%
St. Pete Beach	13%	25%	16%	8%
Dunedin	7%	13%	13%	5%
Treasure Island	6%	11%	9%	3%
Clearwater	6%	8%	11%	5%
Indian Shores & Indian Rocks Beach	3%	5%	6%	0%
Largo	3%	1%	5%	3%
Tarpon Springs	2%	3%	2%	1%
Gulfport	2%	1%	9%	1%
Pass-A-Grille Beach	2%	1%	5%	1%
Seminole	1%	0%	4%	1%
Palm Harbor	1%	1%	2%	1%
Safety Harbor	1%	1%	1%	1%
North Redington Beach/Redington Shores	1%	1%	1%	0%
Tierra Verde	0%	0%	2%	0%
Pinellas Park	0%	0%	2%	0%
Oldsmar	0%	0%	0%	0%

OTHER DESTINATIONS VISITED

For a majority of visitors surveyed, St. Pete/Clearwater was the only destination visited during their trip to the area in Q2 2023 (68%). In addition to St. Pete/Clearwater, visitors went to Tampa (14%), Sarasota (7%), and/or Orlando/Disney (6%) as part of their trip.

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



Question: Which of these other destinations did you visit while on this trip? (Select all that apply) Base: All Respondents. 1,556 responses.

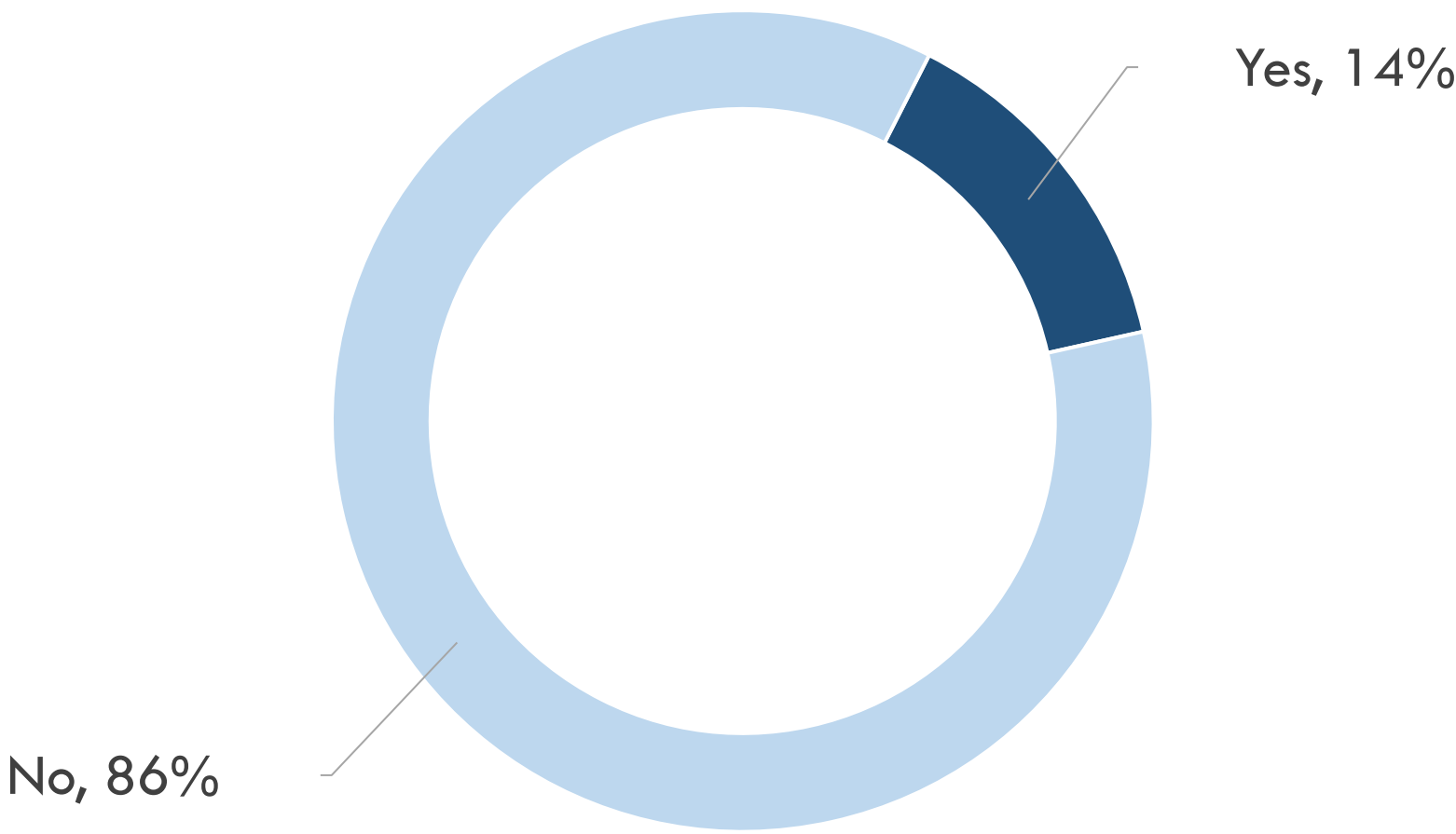
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	350	253	642
Tampa	5%	7%	18%
Sarasota Area	4%	6%	9%
Orlando/Disney	8%	4%	5%
Ft. Myers/SW Florida	3%	2%	6%
Miami	4%	3%	2%
Jax/St. Augustine	1%	1%	1%
Crystal River	1%	1%	1%
Ocala/Gainesville	0%	0%	1%
Lakeland/Winter Haven	0%	0%	1%
Tallahassee	0%	1%	0%
Daytona	1%	0%	0%
Florida Keys	1%	0%	0%
Ft. Lauderdale/Palm Beach	0%	0%	0%
Sebring	0%	0%	1%
Kennedy/Space Coast/Cocoa/Melbourne	1%	0%	0%
Panhandle	1%	0%	0%
Everglades	0%	0%	0%
No others	80%	80%	64%

FIRST-TIME FLORIDA VISITOR

In Q2 2023, 14 percent of all St. Pete/Clearwater visitors were in the State of Florida for the first time (up from 11% in Q2 2022). Hotel guests, VFRs and day trippers were equally likely to be on a first-time trip to Florida (14% each).

Figure 21: First-Time Visitors to Florida



Detail by Traveler Segment

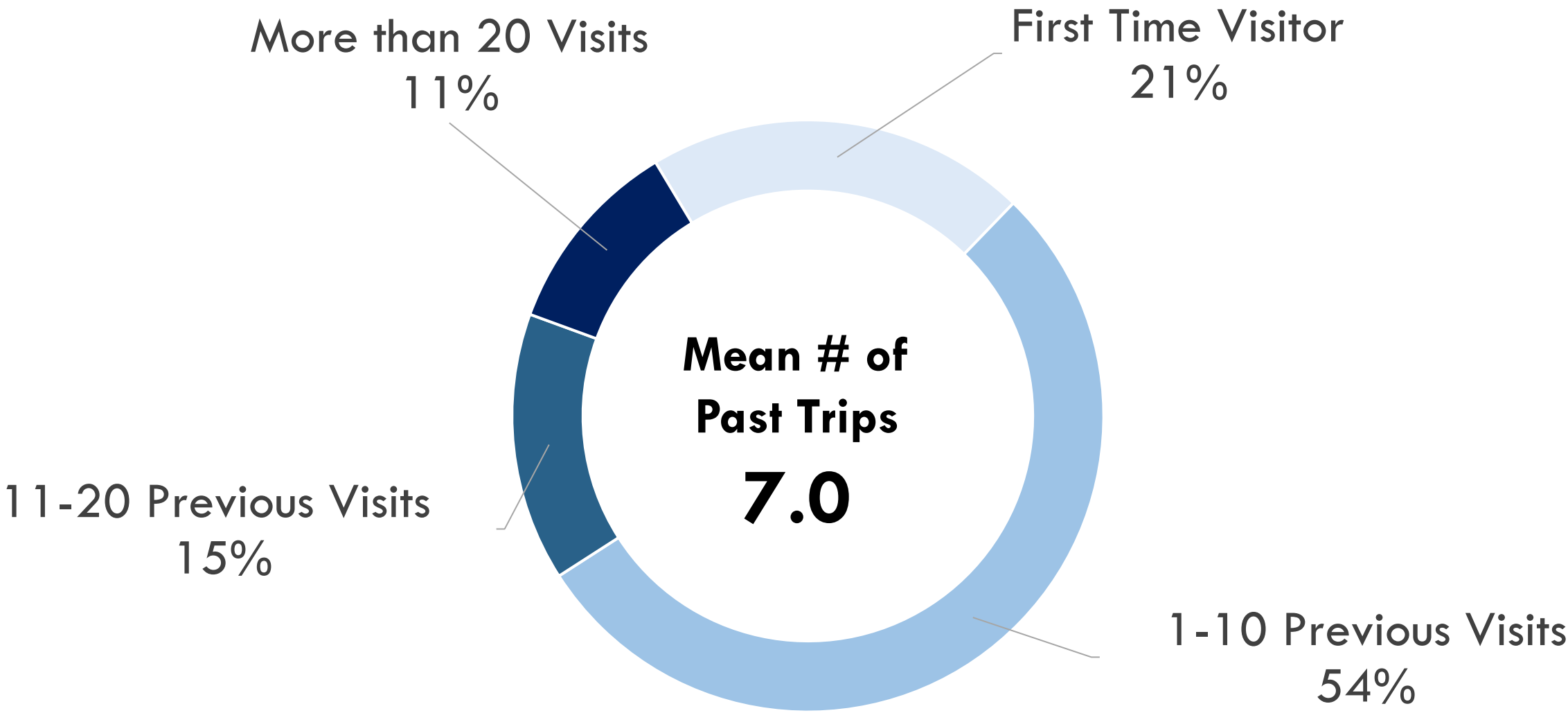
	Hotel	VFR	Day Trip
Base Size	350	253	642
Yes	14%	14%	14%
No	86%	86%	86%

Question: Is this your first visit to Florida? Base: All Respondents 1,556 responses.

PREVIOUS VISITS TO ST. PETE/CLEARWATER

One-in-five visitors were first-time visitors to the St. Pete/Clearwater area. Among those who had visited the destination, they had taken 7.0 previous trips to the area (in line with 7.0 previous trips in Q2 2022).

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



Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	302	219	577
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	4.1	6.2	7.9

Question: Prior to this visit, how many times have you been to the St. Pete/Clearwater area?
Base: All Respondents. 1,373 responses.

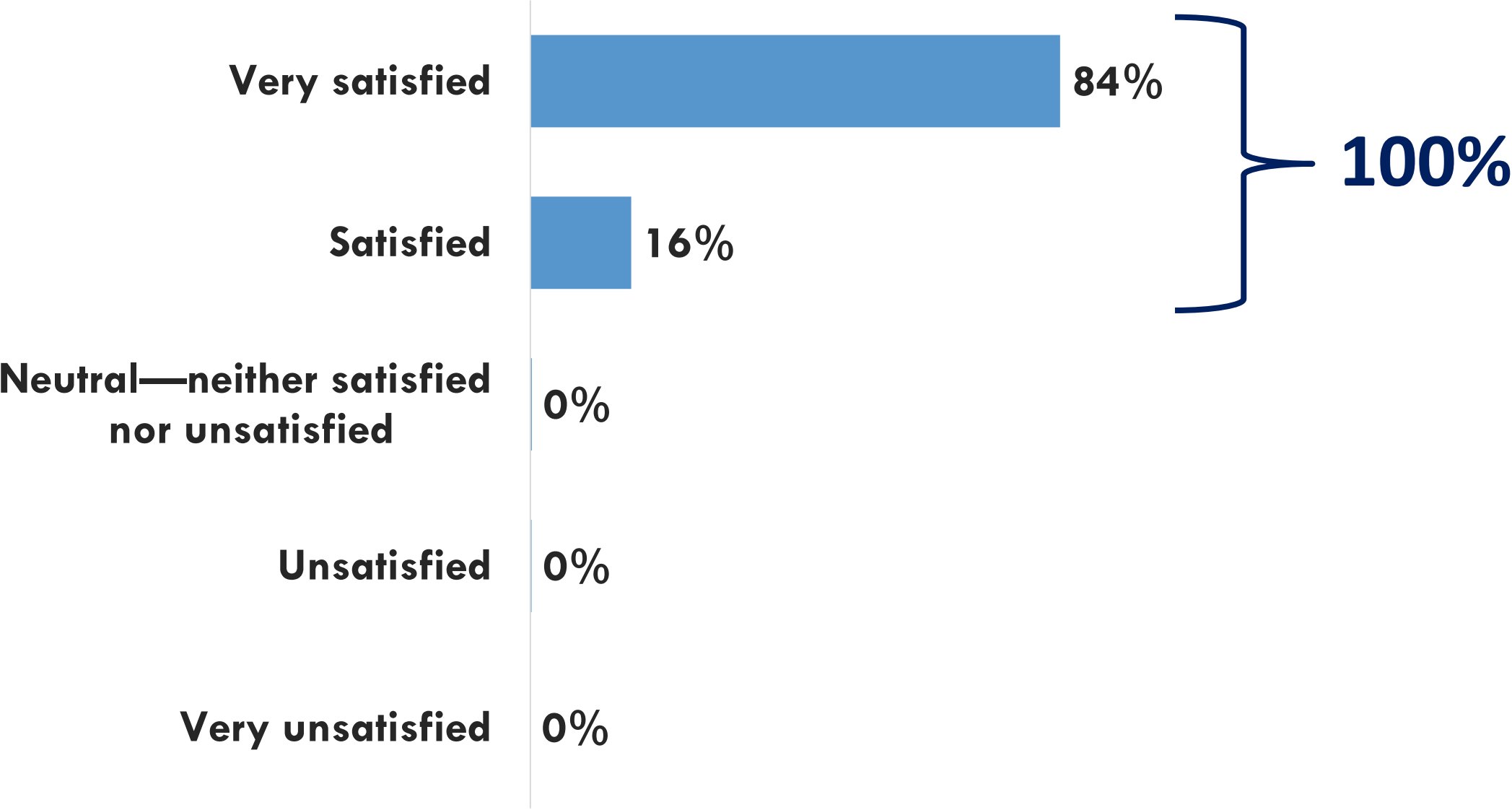
A photograph of four people jumping into the ocean at sunset. The scene is captured from a low angle, showing the people in mid-air with their arms outstretched. The water is dark and rippling, and the sky is a mix of orange, yellow, and blue. A vertical teal line is positioned to the left of the text.

Visitor Satisfaction

OVERALL SATISFACTION

All visitors surveyed were either very satisfied (84%) or satisfied (16%) with their St. Pete/Clearwater experience.

Figure 26: Overall Satisfaction



Detail by Traveler Segment

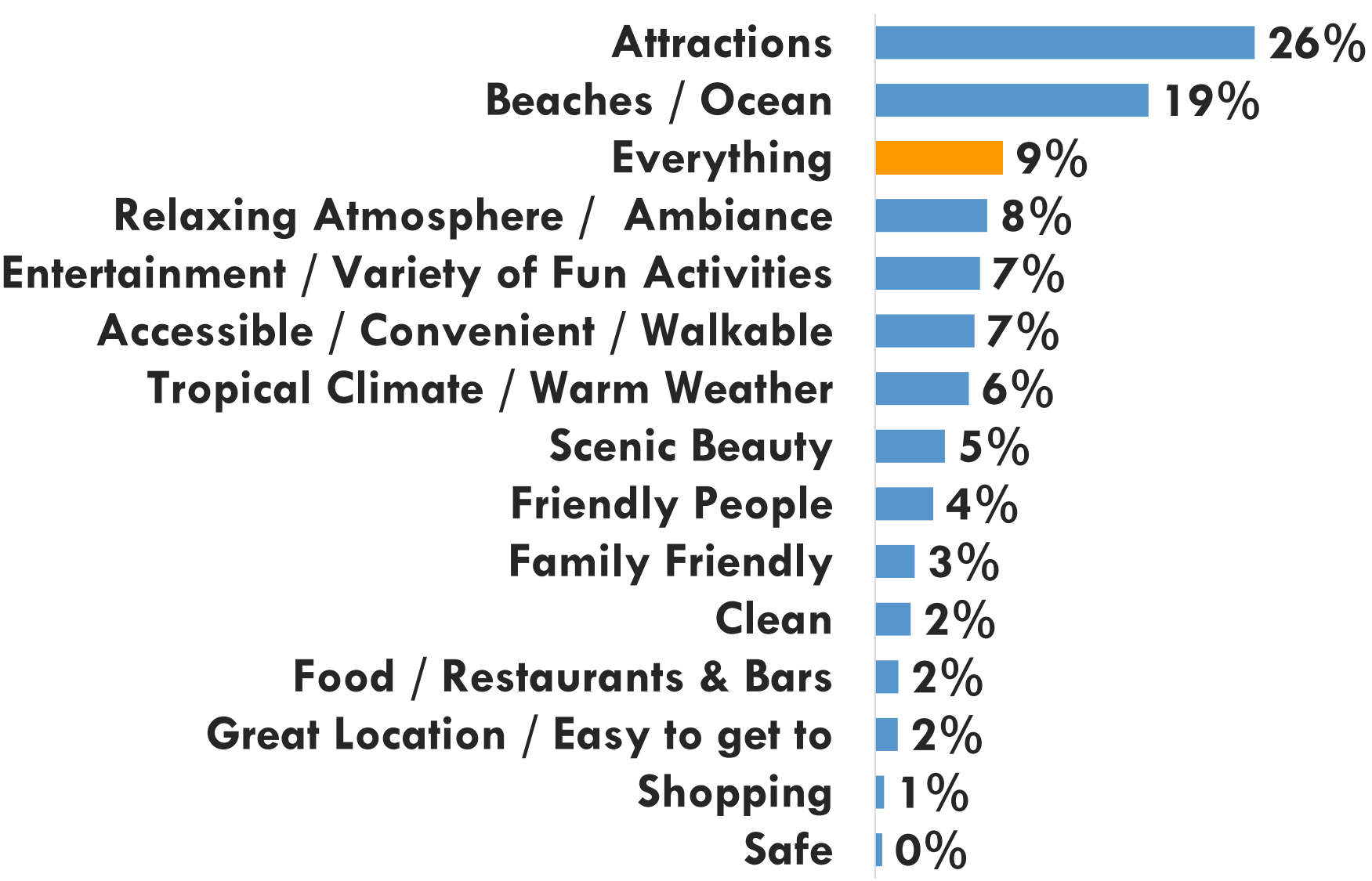
	Hotel	VFR	Day Trip
Base Size	350	253	642
Very satisfied	92%	91%	80%
Satisfied	8%	9%	20%
Neutral—neither satisfied nor unsatisfied	0%	0%	0%
Unsatisfied	0%	0%	0%
Very unsatisfied	0%	0%	0%

Question: How satisfied are you with your experience in the St. Pete/Clearwater area on this trip? (Select one) Base: All Respondents. 1,556 responses.

MOST LIKED ASPECTS OF ST. PETE/CLEARWATER

Attractions were the most liked aspect of the St. Pete/Clearwater area (26%), followed by beaches (19%) and everything (9%).

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



Detail by Traveler Segment

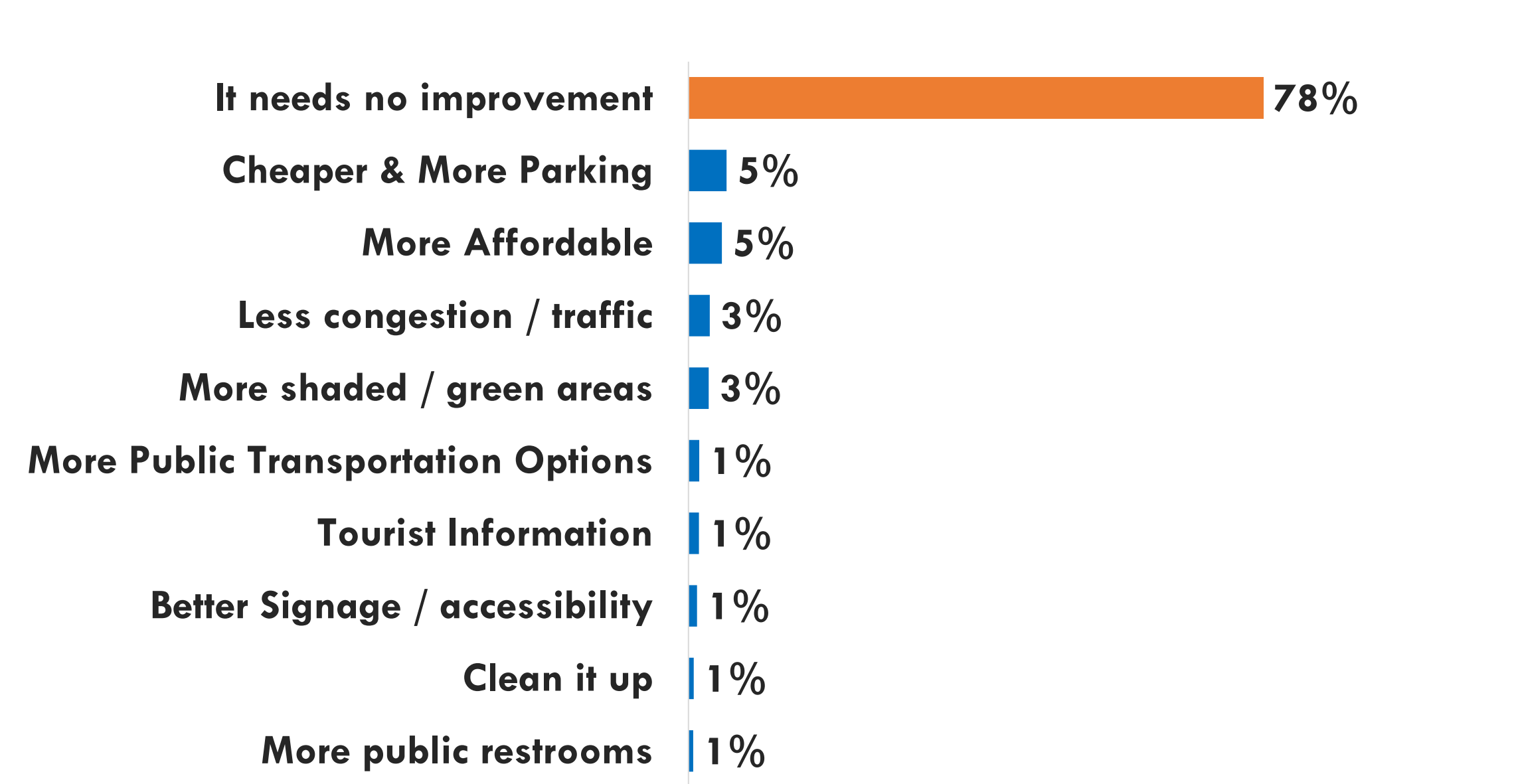
	Hotel	VFR	Day Trip
Base Size	350	253	642
Attractions	10%	11%	34%
Beaches / Ocean	34%	13%	13%
Everything	9%	10%	8%
Relaxing Atmosphere / Ambiance	10%	13%	6%
Entertainment / Variety of Fun Activities	3%	5%	9%
Accessible / Convenient / Walkable	7%	5%	7%
Tropical Climate / Warm Weather	12%	12%	4%
Scenic Beauty	5%	4%	5%
Friendly People	1%	10%	4%
Family Friendly	4%	7%	2%
Clean	1%	1%	3%
Food / Restaurants & Bars	2%	6%	1%
Great Location / Easy to get to	1%	1%	2%
Shopping	0%	2%	1%
Safe	0%	0%	0%

Question: What do you like most about the St. Pete/Clearwater area?
Base: All Respondents. 1,556 responses.

ATTRACTIONS/SERVICES DESIRED

When asked what services or additional attractions would enhance their experience in the destination, the majority of visitors surveyed reported that St. Pete/Clearwater needs no improvement (78%). Of the specific suggestions provided, visitors suggested cheaper and more parking (5%) and another 5 percent said being more affordable would enhance the visitor experience.

Figure 24:Additional Attractions or Services (Unaided)



Detail by Traveler Segment

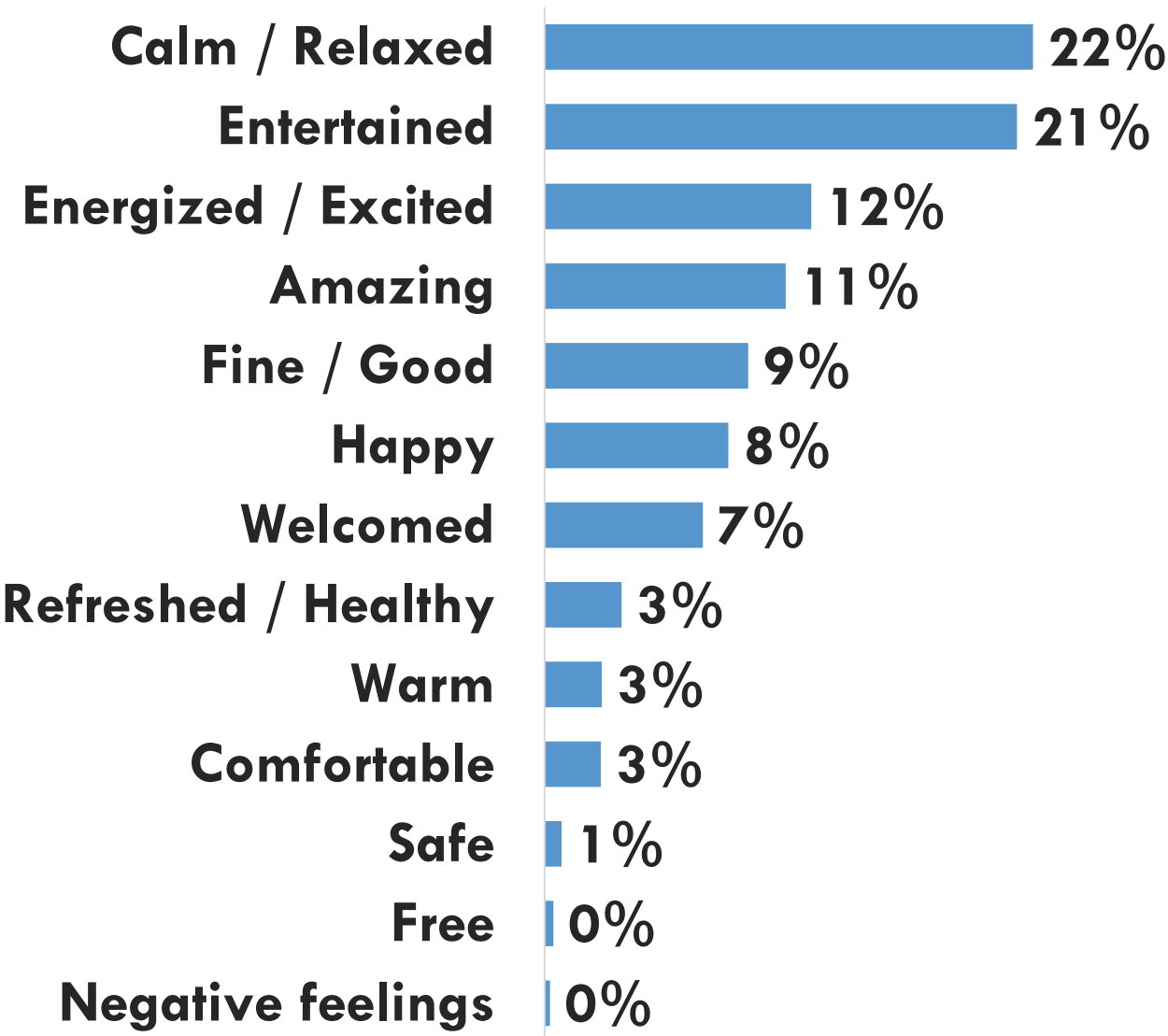
	Hotel	VFR	Day Trip
Base Size	350	253	642
It needs no improvement	24	79%	80%
Cheaper & More Parking	5%	4%	5%
More Affordable	4%	4%	4%
Less congestion / traffic	5%	3%	2%
More shaded / green areas	3%	2%	3%
More Public Transportation Options	2%	4%	1%
Tourist Information	1%	0%	2%
Better Signage / accessibility	3%	1%	1%
Clean it up	1%	1%	0%
More public restrooms	0%	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. 1,556 responses.

EMOTIONS WHILE IN ST. PETE/CLEARWATER

St. Pete/Clearwater visitors reported feeling calm/relaxed (22%) and entertained (21%). Hotel guests were the segment most likely to be calm and relaxed (36%).

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



Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	350	253	642
Calm / Relaxed	36%	23%	14%
Entertained	9%	11%	27%
Energized / Excited	15%	9%	11%
Amazing	8%	8%	12%
Fine / Good	6%	10%	10%
Happy	8%	12%	8%
Welcomed	5%	13%	8%
Refreshed / Healthy	6%	4%	2%
Warm	4%	4%	2%
Comfortable	2%	3%	3%
Safe	1%	2%	1%
Free	0%	0%	1%
Negative feelings	0%	0%	0%

Question: What one word or phrase best describes how you feel in the St. Pete/Clearwater area? Base: All Respondents. 1,556 responses.

LIKELIHOOD TO RECOMMEND

Visitors said they were very likely to recommend St. Pete/Clearwater area as a travel destination to others (9.4/10).

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



Question: How likely are you to recommend the St. Pete/Clearwater area as a place to visit to other travelers? Please use a 10-point scale where 1 represents “Definitely will NOT recommend” and 10 represents “Certain to recommend.” Base: All Respondents.1,556 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	350	253	642
10—Certain to Recommend	56%	56%	44%
9	40%	38%	51%
8	4%	5%	4%
7	0%	0%	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%
Mean Score	9.5	9.5	9.4

LIKELIHOOD TO RETURN

In line with a high likelihood to recommend St. Pete/Clearwater to other travelers, visitors reported a high likelihood to return in the future (9.5/10).

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



Question: How likely are you to return to the St. Pete/Clearwater area? Please use a 10-point scale where 1 represents “Definitely will NOT return” and 10 represents “Certain to return.”
Base: All Respondents. 1,556 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	350	253	642
10—Certain to Return	68%	65%	51%
9	29%	32%	46%
8	3%	3%	3%
7	0%	0%	0%
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%
Mean Score	9.6	9.6	9.5



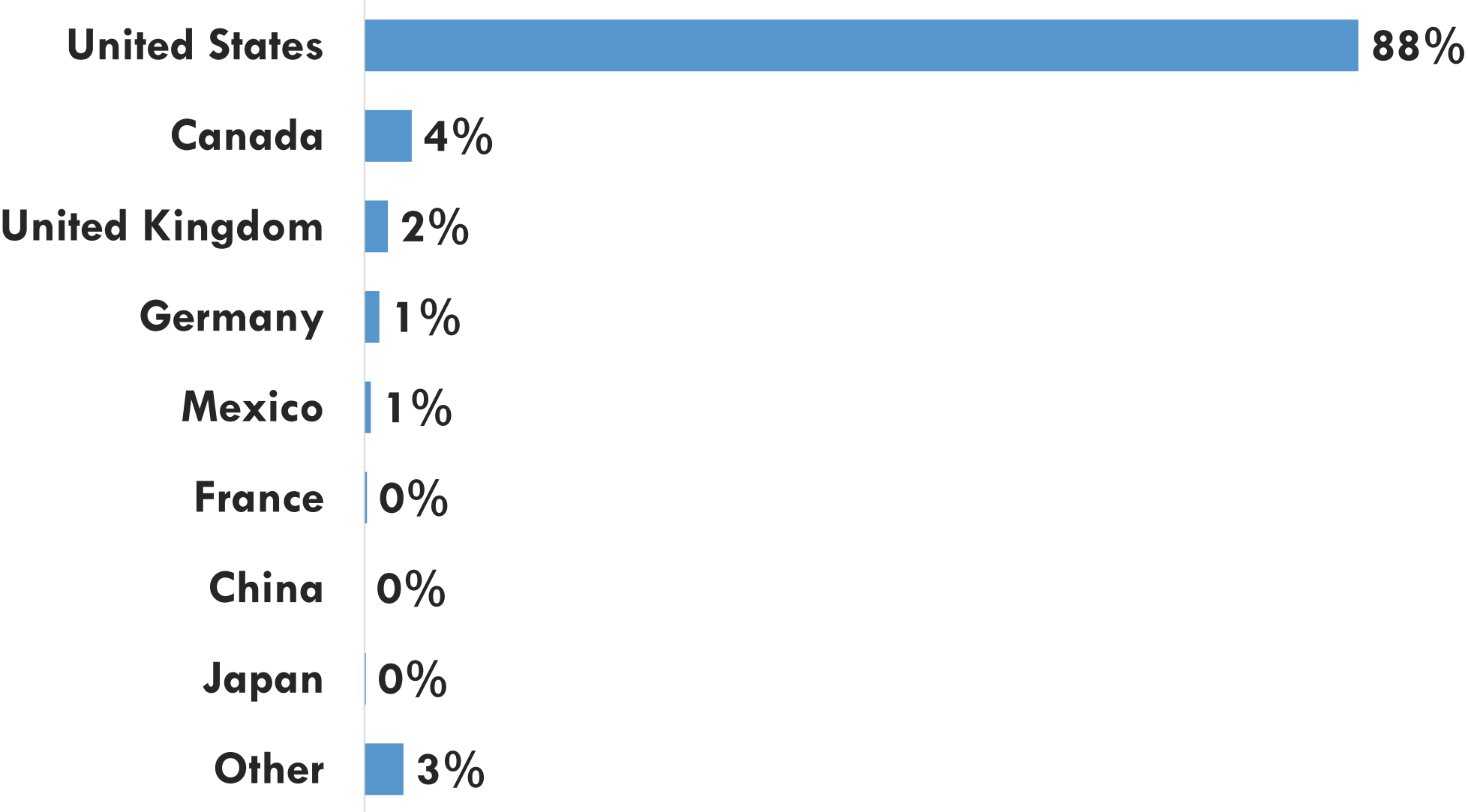
Q2 2023

Point of Origin &
Demographic Profile

COUNTRY OF ORIGIN

The St. Pete/Clearwater area saw an increase in international visitors in Q2 2023 (12%, up from 7% in Q2 2022).

Figure 29: Country of Origin



Detail by Traveler Segment

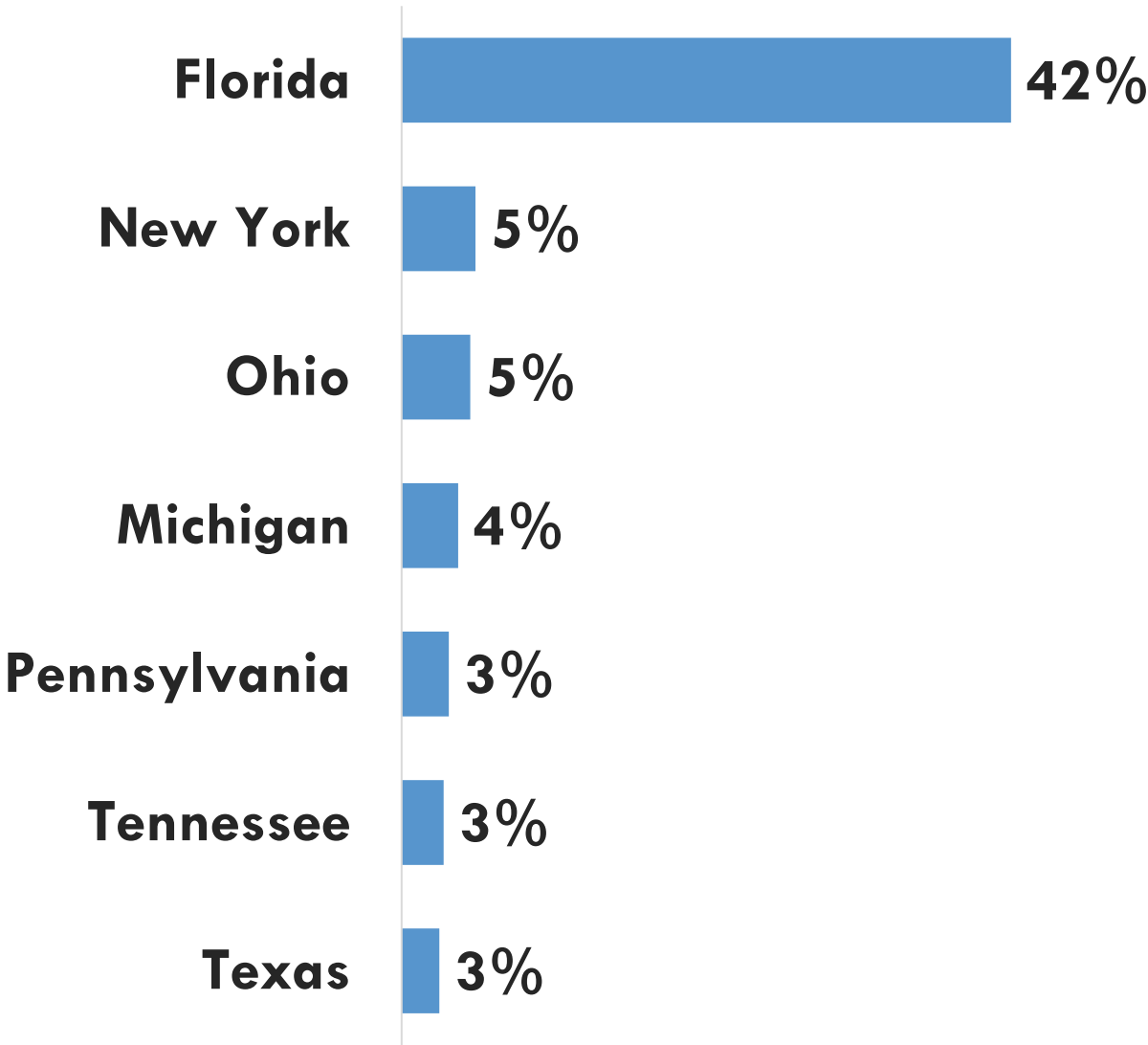
	Hotel	VFR	Day Trip
Base Size	350	253	642
United States	88%	87%	88%
Canada	4%	5%	4%
United Kingdom	2%	0%	2%
Germany	2%	1%	1%
Mexico	1%	1%	1%
France	0%	0%	0%
China	0%	0%	0%
Japan	0%	0%	0%
Other	3%	7%	4%

Question: In what country do you reside? Base: All Respondents.1,556 responses.

TOP STATES OF ORIGIN

Over four-in ten domestic visitors in Q2 2023 were Florida residents (42% up from 34% in Q2 2022). New York (5%), Ohio (5%), Michigan (4%), Pennsylvania (3%), Tennessee (3%) and Texas (3%) contributed the most out-of-state visitors.

Figure 30: State of Origin



Detail by Traveler Segment

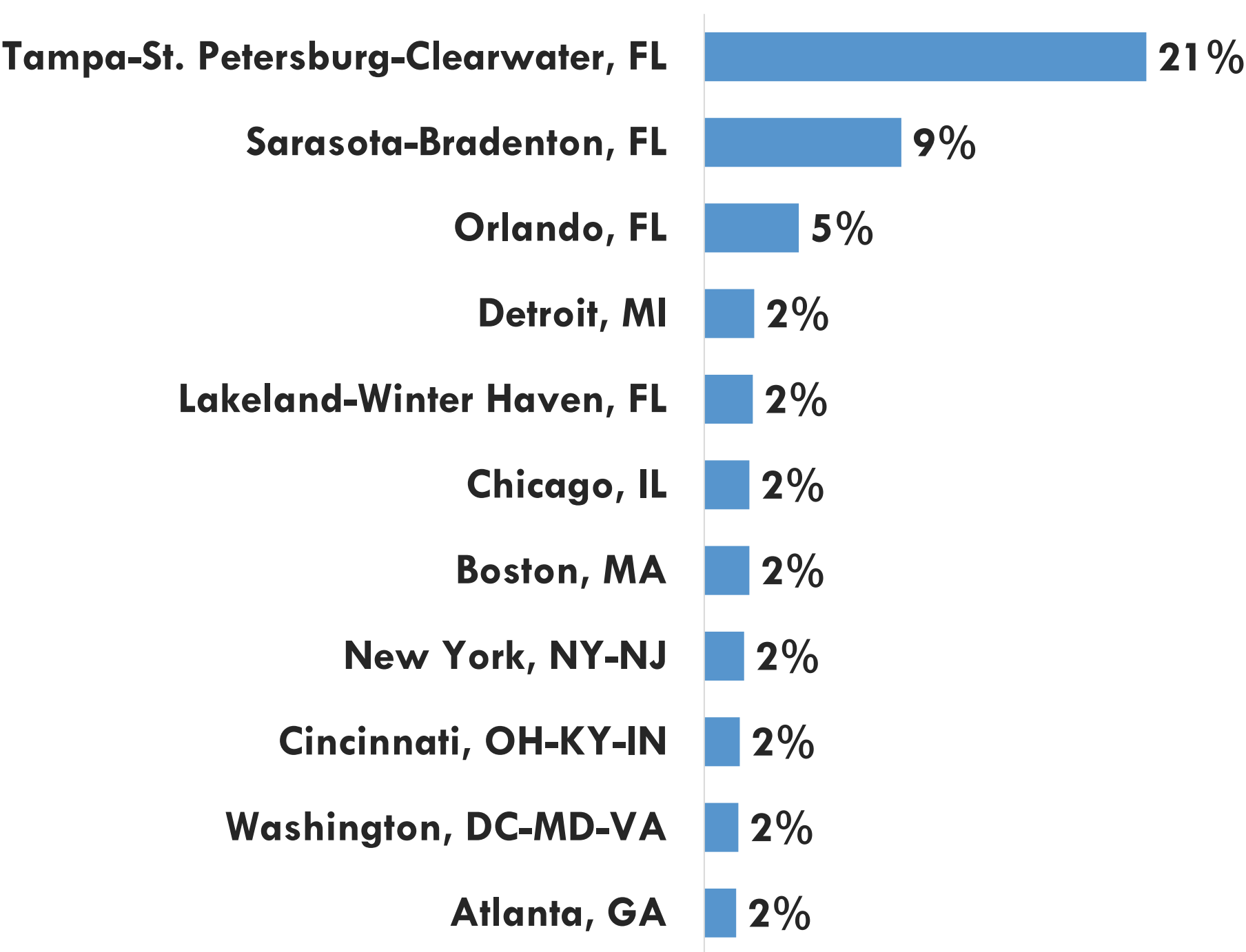
	Hotel	VFR	Day Trip
Base Size	350	253	642
Florida	23%	16%	54%
New York	7%	6%	4%
Ohio	6%	5%	4%
Michigan	4%	2%	3%
Pennsylvania	5%	5%	3%
Tennessee	2%	4%	3%
Texas	4%	4%	2%

Question: What is your zip/postal code? Base: Domestic respondents. 1,556 responses.

MSA OF ORIGIN

The top three Florida visitor markets in Q2 2023 were Tampa (21%), Sarasota/Bradenton (9%), and Orlando (5%). The top out-of-state markets amongst Q2 2023 visitors were Detroit, MI, Chicago, IL, Boston, MA, New York, NY-NJ, Cincinnati, OH-KY-IN, Washington, DC-MD-VA and Atlanta, GA (2% each).

Figure 31: MSA



Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	271	190	524
Tampa-St. Petersburg-Clearwater, FL	9%	1%	28%
Sarasota-Bradenton, FL	0%	1%	14%
Orlando, FL	3%	2%	5%
Detroit, MI	3%	1%	2%
Lakeland-Winter Haven, FL	3%	0%	3%
Chicago, IL	4%	1%	1%
Boston, MA	1%	1%	2%
New York, NY-NJ	2%	2%	2%
Cincinnati, OH-KY-IN	2%	2%	2%
Washington, DC-MD-VA	1%	2%	2%
Atlanta, GA	4%	2%	1%

Question: What is your zip/postal code? Base: Domestic respondents. 1,200 responses.

DEMOGRAPHICS

The demographic profile for all visitors in Q2 2023 are as follows:



Average Age

51.6 years old



Household Income

\$76,845



Ethnicity

Caucasian – 87%

Latino / Hispanic – 6%

Black/African-American – 5%



Gender*

Female: 50%

Male: 50%



Marital Status

Single: 25%

Married/partnered: 69%

Children under 18: 13%



Orientation

Heterosexual – 93%

LGBTQ – 1%

Other – 0%

**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.*

DEMOGRAPHICS BY VISITOR SEGMENT

The demographic profile by place of stay segments in Q2 2023 are as follows:

	Hotel	VFR	Day Trip
Female	46%	58%	52%
Male	54%	42%	48%
Mean Age	49.5	51.4	52.0
Single	20%	41%	27%
Married	76%	44%	67%
Has Children	14%	10%	13%
Annual Household Income	\$86,236	\$59,901	\$74,385
Caucasian	90%	87%	86%
Latino / Hispanic	3%	6%	7%
Black / African-American	5%	4%	5%
Asian/Pacific Islander	2%	3%	3%
American Indian/Alaska Native	0%	0%	0%
Other	0%	0%	0%
Heterosexual	95%	90%	93%
LGBTQ	1%	3%	1%