ST. PETE
CLEARWATER

Visit St. Pete/Clearwater

VISITOR PROFILE STUDY

Report of Findings
Q3 2022

Research prepared for Visit St. Pete/Clearwater by:

Destination ◆ Analysts

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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 here comes from an in-person intercept survey of St. Pete/Clearwater area visitors at locations throughout the destination. To be considered a visitor, respondents had to reside outside of Pinellas County. This interim report presents the top-line survey data collected from visitors surveyed between July 2022 — September 2022.

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

In total, 1,200 completed surveys from Pinellas County visitors were collected.

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

RESEARCH OVERVIEW & METHODOLOGY

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

- Chihuly Collection
- Clearwater Beach
- Clearwater Marine Aquarium
- Dunedin
- Hyatt Place
- John's Pass Village & Boardwalk
- Museum of Fine Arts
- Pier 60
- Salvador Dali Museum

- Sandpearl Resort
- Shephard's Beach Resort
- St. Pete-Clearwater International Airport
- St. Pete Pier
- Sunken Gardens
- Tampa International Airport
- The James Museum
- Tradewinds Island Grand
- Wyndham Grand Clearwater Beach

Above: Destination Analysts Field Research Team

RESEARCH OBJECTIVES

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

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

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

Q3 2022
Economic Impact Analysis

ECONOMIC IMPACT: DEFINITIONS

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

- **Direct visitor spending** – The injection of money into the local economy that takes place when a visitor purchases any good or service inside Pinellas County.

- **Total economic impact** – The total change in economic activity in Pinellas County generated by direct spending. This includes direct visitor spending as well as its induced and indirect effects in the county.

- **Tax revenues generated** – Tax revenues flowing to government coffers as a result of direct visitor spending.

- **Hotel room nights** – The estimated number of hotel room nights in Pinellas County generated by visitors.

- **Indirect effects** – Changes in inter-industry transactions when supplying industries respond to increased demands from the directly affected industries (e.g., impacts from non-wage expenditures).

- **Induced effects** – Changes in local spending that result from income changes in the directly and indirectly affected industry sectors (e.g., impacts from wage expenditures; the subsequent round of spending in the local economy made by the households of the employees of companies that incur both direct and indirect expenditures).

ECONOMIC IMPACT: DEFINITIONS

- **Hotel guests –** Pinellas County visitors who stayed overnight in a Pinellas County hotel, motel, resort or inn.

- **Visiting friends/relatives (VFRs) –** Pinellas County visitors who stayed overnight in the private residence of a friend or family member who lives in Pinellas County.

- **Vacation rental guests –** Pinellas County visitors who stayed overnight in a condo, vacation home or other private home rental in Pinellas County.

- **Day trip visitors (regional) –** Pinellas County visitors who came for the day and reside in the regional area surrounding Pinellas County.

- **Day trip visitors (travelers) –** Pinellas County visitors who came for the day, stayed overnight outside Pinellas County and reside outside the regional area surrounding the county.

- **Peer-to-peer home share guests –** Pinellas County visitors who stayed overnight in a home share rental in Pinellas County booked through AirBnB, VRBO or similar.

- **Other –** Pinellas County visitors who stayed overnight in other types of lodging.

ECONOMIC IMPACT ESTIMATES: KEY FINDINGS – Q3 2022

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

	July 2022	August 2022	September 2022	Q3 (July 2022 – September 2022)
Visitors to Pinellas County	1,417,280	1,163,440	1,080,323	3,661,043
Direct Visitor Spending in Pinellas County	$612,218,895	$479,744,011	$453,426,563	$1,545,389,468
Total Economic Impact of Tourism to Pinellas County	$1,034,505,906	$811,927,481	$764,948,341	$2,611,381,728
Tax Revenues Generated for Pinellas County	$39,508,524	$29,742,501	$27,884,853	$97,135,879
Hotel Room Nights	581,030	504,259	452,019	1,537,308
Visitor Industry Payroll	$331,553,136	$261,176,710	$246,080,550	$838,810,396
Jobs Supported	10,154	8,049	7,569	25,772

ECONOMIC IMPACT ESTIMATES: SUMMARY OF KEY FINDINGS

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

- **Visitors to Pinellas County** - Pinellas County had a total of 3.7 million visitors between July 2022 – September 2022. The largest segment of Pinellas County's visitor volume this quarter is day trip visitors from outside the surrounding region, comprising 1.3 million visitors, or 28 percent of all visitors.

- **Direct Visitor Spending in Pinellas County** - The Pinellas County tourism industry generated $1.5 billion in direct visitor spending inside the county from July 2022 – September 2022. The largest share of this spending was generated by hotel guests who stayed overnight in commercial lodging. These visitors were responsible for $732 million in visitor spending, or 47 percent of the total.

- **Total Economic Impact of Tourism to Pinellas County** – Tourism generated a total of $2.61 billion in economic impact for Pinellas County during July 2022 – September 2022. The total economic impact is comprised of direct visitor spending, as well as indirect and induced effects.

ECONOMIC IMPACT ESTIMATES: SUMMARY OF KEY FINDINGS

• **Tax Revenues Generated for Pinellas County** – Pinellas County's tourism industry generated $97.1 million in tax revenues for governmental entities from July 2022 – September 2022. Taxes directly generated by the visitor industry include revenues from the transient occupancy tax (hotel tax), sales taxes and property taxes paid on lodging facilities.

• **Hotel Room Nights** – Between July 2022 – September 2022, an estimated 1.54 million hotel room nights were generated in Pinellas County by visitors.

• **Visitor Industry Payroll and Jobs supported** – Between July 2022 – September 2022, the Pinellas County tourism industry had an estimated total combined payroll of $838 million. This is estimated to have supported 25,772 jobs county-wide.

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

VISITORS TO PINELLAS COUNTY

Peer-to-peer, 105,999   Other, 6,048

Hotel guests, 653,056

Day trip visitors (travelers), 1,312,747

VFRs, 263,942

Vacation rental, 306,279

Day trip visitors (regional), 1,012,971
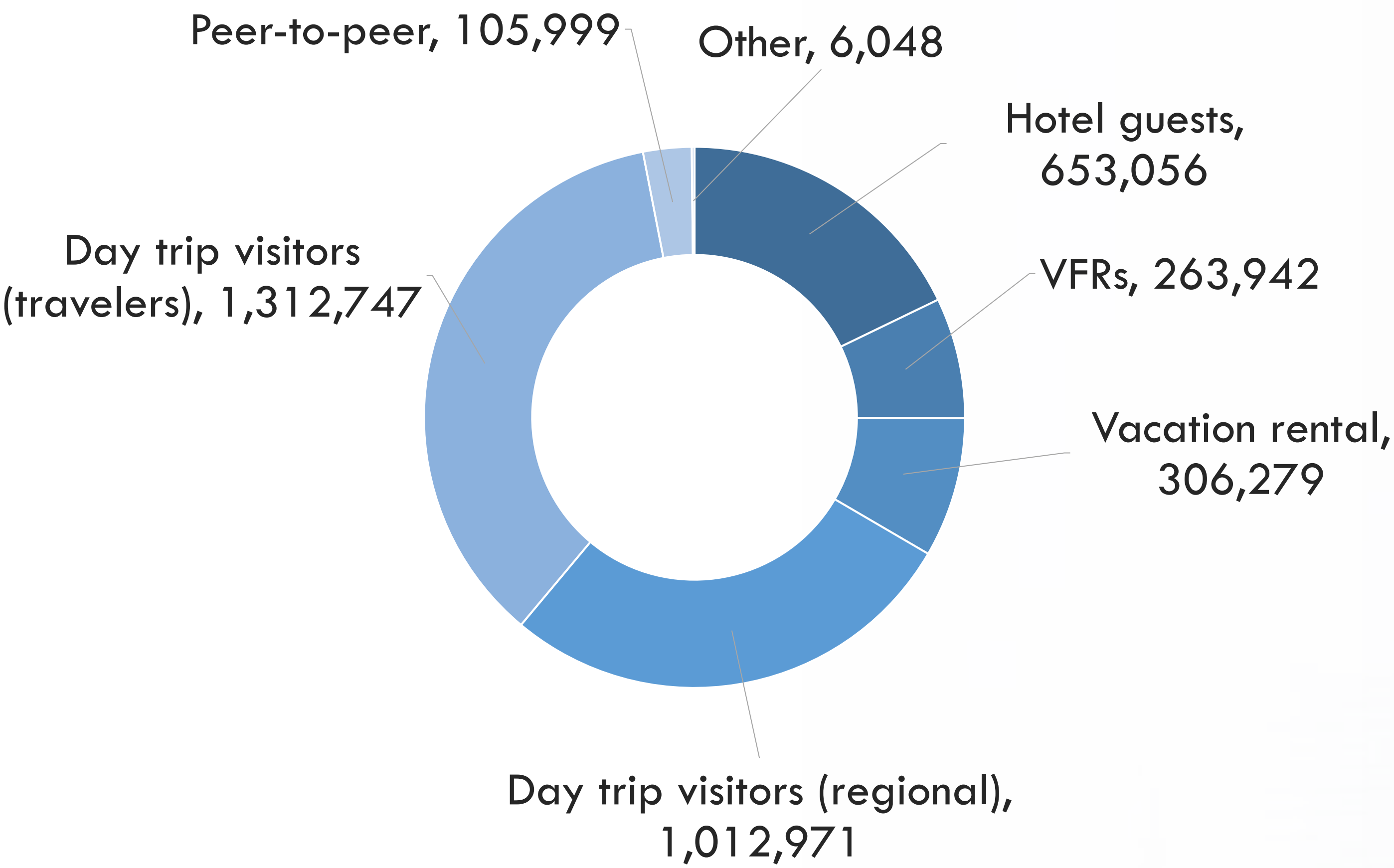
Visitors to Pinellas County, by type of visitor

Hotel guests	653,056
VFRs	263,942
Vacation rental	306,279
Day trip visitors (regional)	1,012,971
Day trip visitors (travelers)	1,312,747
Peer-to-peer	105,999
Other	6,048
TOTAL VISITORS	**3,661,043**

DIRECT VISITOR SPENDING: BY TYPE OF VISITOR

Peer-to-peer, $108,636
Other, $10,098
Day trip visitors (travelers), $126,096
Day trip visitors (regional), $74,481
Vacation rental, $368,826
Hotel guests, $732,139
VFRs, $125,114
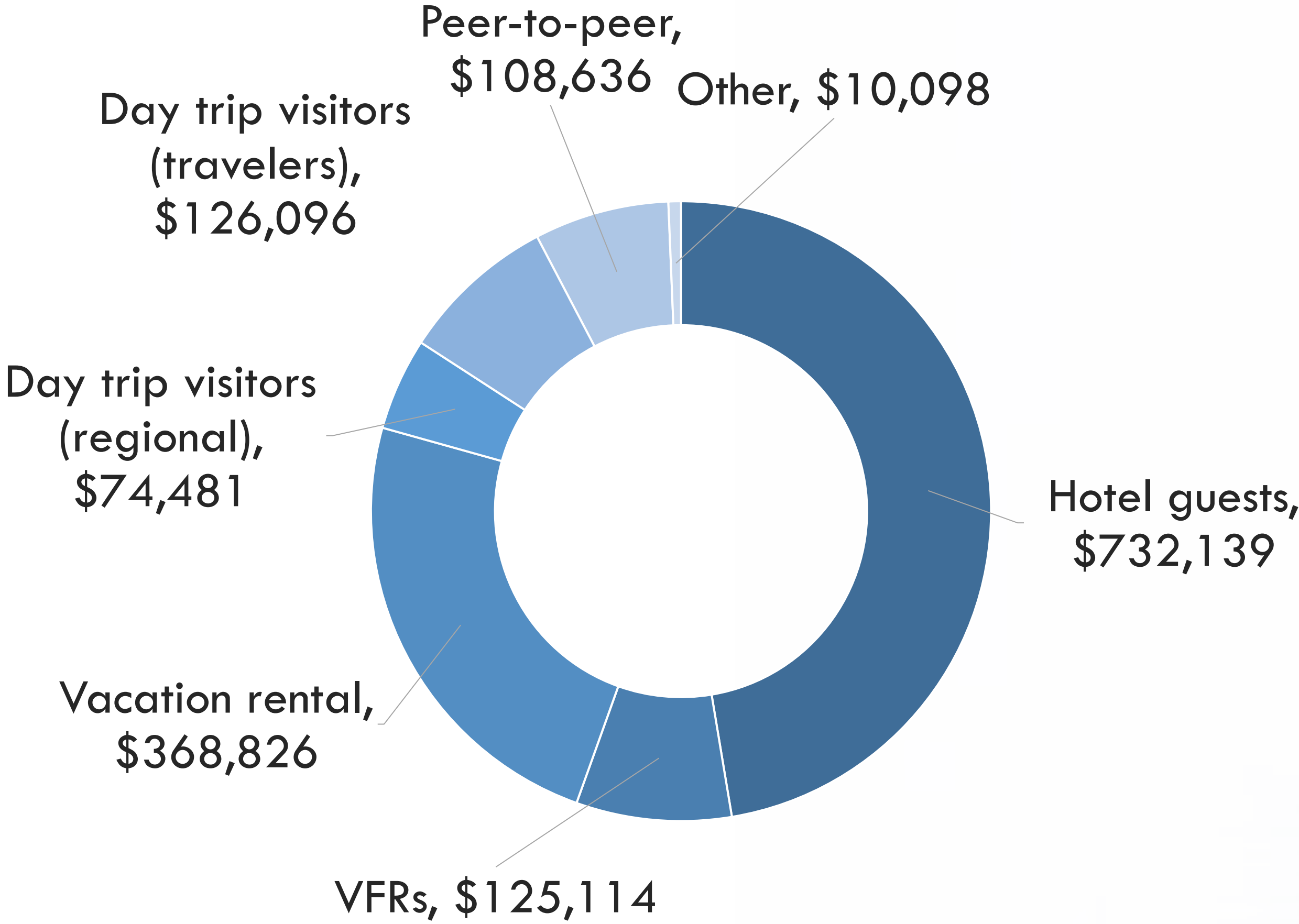
Spending in Pinellas County, by type of visitor (in thousands)

Hotel guests	$732,139
VFRs	$125,114
Vacation rental	$368,826
Day trip visitors (regional)	$74,481
Day trip visitors (travelers)	$126,096
Peer-to-peer	$108,636
Other	$10,098
TOTAL DIRECT VISITOR SPENDING	**$1,545,389**

DIRECT VISITOR SPENDING: BY TYPE OF SPENDING

Car Rental, $4,506

Other, $25,734

Local Transportation, $74,827

Entertainment & Sightseeing, $110,988

Retail, $147,767

Lodging, $650,983

Restaurants, $530,583
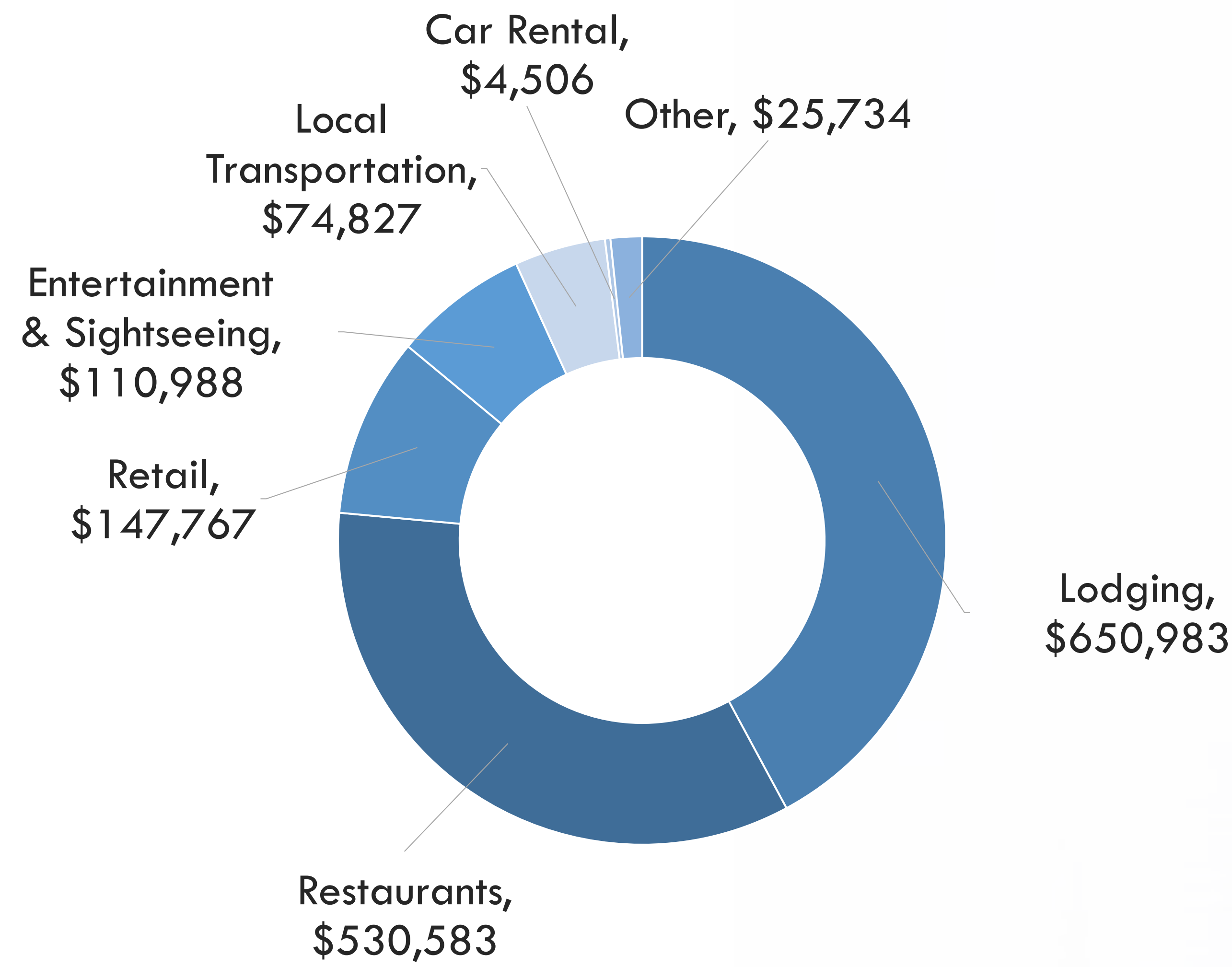
Spending in Pinellas County, by type of spending (in thousands)

Lodging	$650,983
Restaurants	$530,583
Retail	$147,767
Entertainment & Sightseeing	$110,988
Local Transportation	$74,827
Car Rental	$4,506
Other	$25,734
TOTAL DIRECT VISITOR SPENDING	**$1,545,389**

TOTAL ECONOMIC IMPACT

Induced Effects,
$544,496,692

Indirect Effects,
$521,495,568

Direct Visitor
Spending,
$1,545,389,468
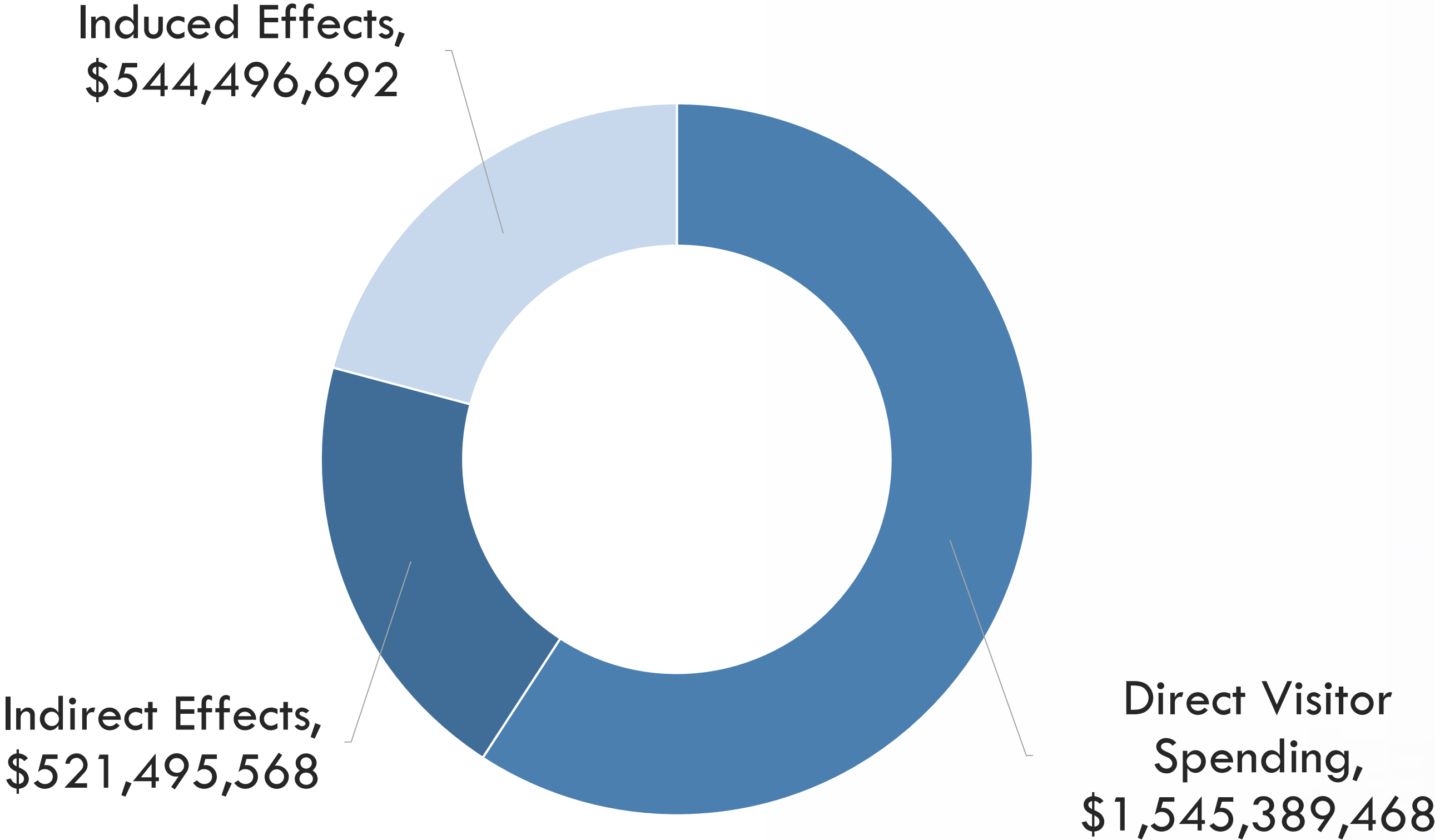
Economic Impact Estimates, by type of effect

Direct Visitor Spending $1,545,389,468
Indirect Effects $521,495,568
Induced Effects $544,496,692

**TOTAL ECONOMIC
IMPACT**   **$2,611,381,728**

TAX REVENUES GENERATED
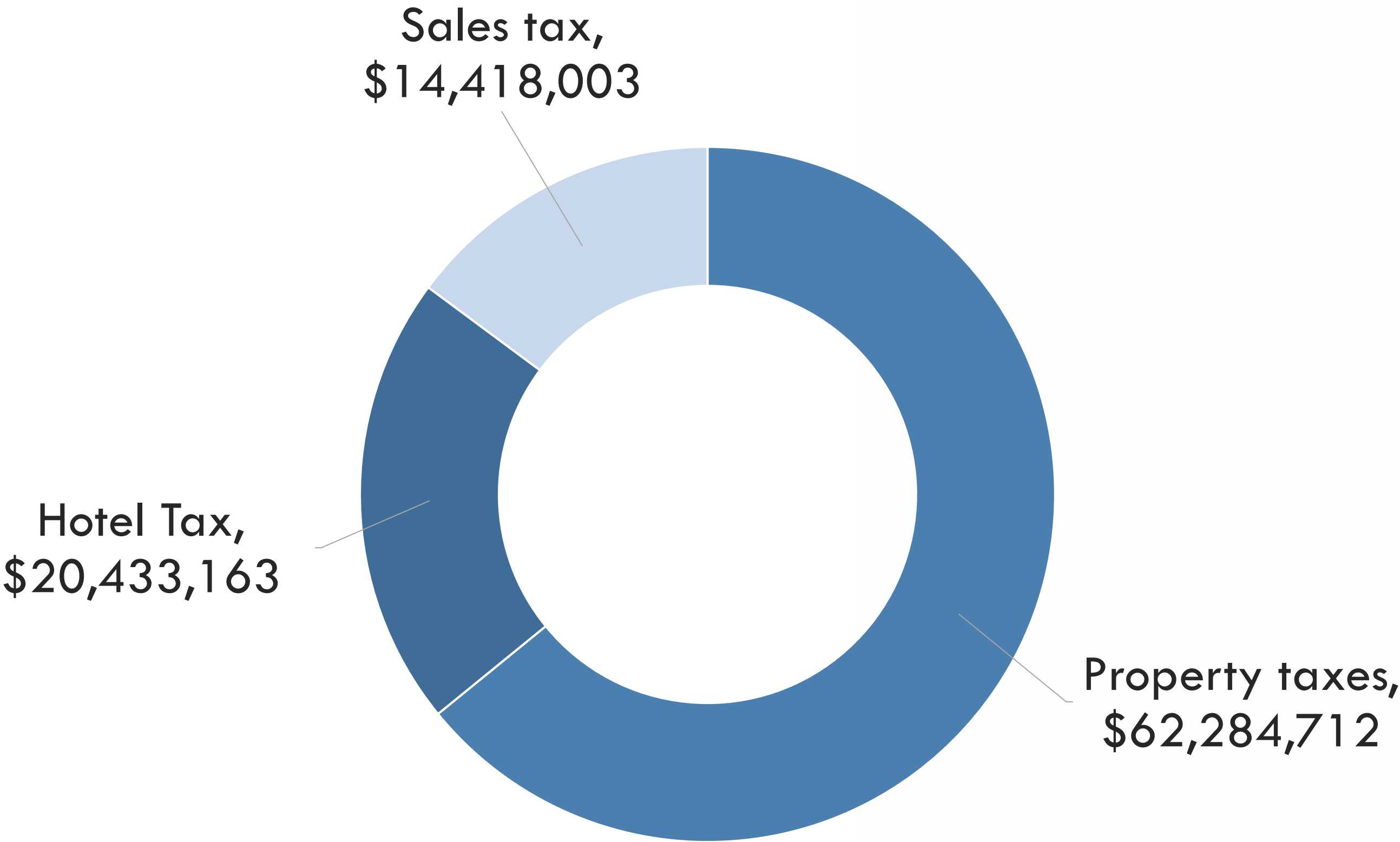
Tax Revenues Generated, by type of tax

Property taxes	$62,284,712
Hotel Tax	$20,433,163
Sales tax	$14,418,003
TOTAL TAX REVENUES GENERATED	$97,135,879

Sales tax, $14,418,003

Hotel Tax, $20,433,163

Property taxes, $62,284,712

Economic Impact YOY Comparison

The following presents the estimated economic impact of tourism to Pinellas County comparing Q3 2022 to past years.

• In this third quarter of 2022, Pinellas County saw consistent visitor volume (down slightly 1.6% from 2021 and up 1.5% from 2019). Visitor spending habits have shifted significantly with growth in spending exceeding growth in volume due to nationwide inflation as well as other impacts. Total economic impact in Q3 is estimated to be up 16.5% from 2021 and up 27.9% from 2019.

• Compared to past years, all spending and economic impact metrics show growth outpacing volume and hotel room nights. Although total occupied room nights is still down from 2019 levels, high average daily rates more than make up for the difference in hotel taxes generated.

ECONOMIC IMPACT YOY COMPARISON- Q3 2022 VS. Q3 2021

	July 2021	July 2022	% Change	August 2021	August 2022	% Change
Visitors to Pinellas County	1,463,507	1,417,280	-3.2%	1,194,266	1,163,440	-2.6%
Direct Visitor Spending in Pinellas County	$533,739,020	$612,218,895	14.7%	$451,750,451	$479,744,011	6.2%
Total Economic Impact of Tourism to Pinellas County	$872,102,581	$1,034,505,906	18.6%	$728,019,914	$811,927,481	11.5%
Tax Revenues Generated for Pinellas County	$35,114,050	$39,508,524	12.5%	$26,913,638	$29,742,501	10.5%
Hotel Room Nights	636,789	581,030	-8.8%	482,440	504,259	4.5%
Visitor Industry Payroll	$278,393,272	$331,553,136	19.1%	$233,838,836	$261,176,710	11.7%
Jobs Supported	8,678	10,154	17.0%	7,327	8,049	9.9%

ECONOMIC IMPACT YOY COMPARISON- Q3 2022 VS. Q3 2021

	September 2021	September 2022	% Change	Q3 2021	Q3 2022	% Change
Visitors to Pinellas County	1,062,528	1,080,323	1.7%	3,720,301	3,661,043	-1.6%
Direct Visitor Spending in Pinellas County	$395,550,743	$453,426,563	14.6%	$1,381,040,214	$1,545,389,468	11.9%
Total Economic Impact of Tourism to Pinellas County	$641,300,251	$764,948,341	19.3%	$2,241,422,746	$2,611,381,728	16.5%
Tax Revenues Generated for Pinellas County	$23,638,625	$27,884,853	18.0%	$85,666,313	$97,135,879	13.4%
Hotel Room Nights	452,801	452,019	-0.2%	1,572,031	1,537,308	-2.2%
Visitor Industry Payroll	$205,928,155	$246,080,550	19.5%	$718,160,263	$838,810,396	16.8%
Jobs Supported	6,456	7,569	17.2%	22,461	25,772	14.7%

ECONOMIC IMPACT YOY COMPARISON- Q3 2022 VS. Q3 2019

The following presents the estimated economic impact of tourism to Pinellas County comparing Q3 2022 and Q3 2019 (Prior to any measurable impacts of the coronavirus pandemic).
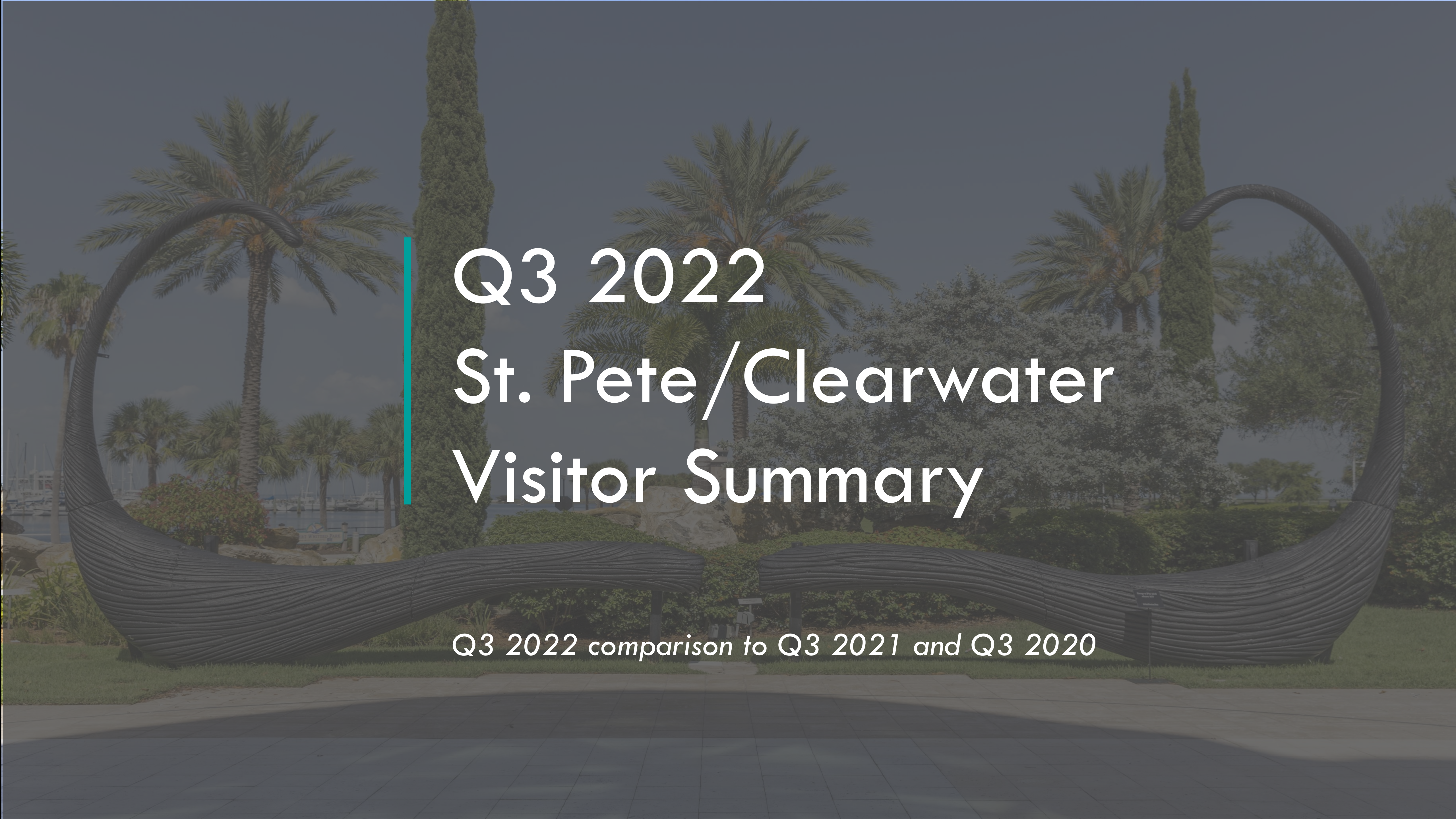
	July 2019	July 2022	% Change	August 2019	August 2022	% Change
Visitors to Pinellas County	1,364,005	1,417,280	3.9%	1,140,690	1,163,440	2.0%
Direct Visitor Spending in Pinellas County	$458,348,933	$612,218,895	33.6%	$380,621,829	$479,744,011	26.0%
Total Economic Impact of Tourism to Pinellas County	$760,894,496	$1,034,505,906	36.0%	$631,054,050	$811,927,481	28.7%
Tax Revenues Generated for Pinellas County	$28,542,975	$39,508,524	38.4%	$22,667,753	$29,742,501	31.2%
Hotel Room Nights	616,586	581,030	-5.8%	522,846	504,259	-3.6%
Visitor Industry Payroll	$243,525,609	$331,553,136	36.1%	$202,605,373	$261,176,710	28.9%
Jobs Supported	7,630	10,154	33.1%	6,366	8,049	26.4%

ECONOMIC IMPACT YOY COMPARISON- Q3 2022 VS. Q3 2019

	September 2019	September 2022	% Change	Q3 2019	Q3 2022	% Change
Visitors to Pinellas County	1,102,292	1,080,323	-2.0%	3,606,987	3,661,043	1.5%
Direct Visitor Spending in Pinellas County	$402,239,540	$453,426,563	12.7%	$1,241,210,302	$1,545,389,468	24.5%
Total Economic Impact of Tourism to Pinellas County	$650,267,292	$764,948,341	17.6%	$2,042,215,838	$2,611,381,728	27.9%
Tax Revenues Generated for Pinellas County	$21,861,051	$27,884,853	27.6%	$73,071,779	$97,135,879	32.9%
Hotel Room Nights	454,365	452,019	-0.5%	1,593,798	1,537,308	-3.5%
Visitor Industry Payroll	$209,660,600	$246,080,550	17.4%	$655,791,582	$838,810,396	27.9%
Jobs Supported	6,645	7,569	13.9%	20,641	25,772	24.9%

Q3 2022
St. Pete/Clearwater
Visitor Summary

Q3 2022 comparison to Q3 2021 and Q3 2020

VISIT ST. PETE/CLEARWATER *Q3 2022*

Destination Analysts
DO YOUR RESEARCH

Average Time Between Decision to Visit & Arrival

- Q3-20
- Q3-21
- Q3-22

24.6	
49.0	
55.0	

Days

Average Daily Spending

$330.35

Q3-22

$279.77
Q3-21

$208.38
Q3-20

Travel Party Size

2.9
Q3-22

Q3-21   2.7

Q3-20   2.6

Average Days & Nights

- Q3-20
- Q3-21
- Q3-22

Days
- 3.0
- 3.0
- 2.3

Nights
- 2.1
- 2.0
- 1.4

0   2   4   6
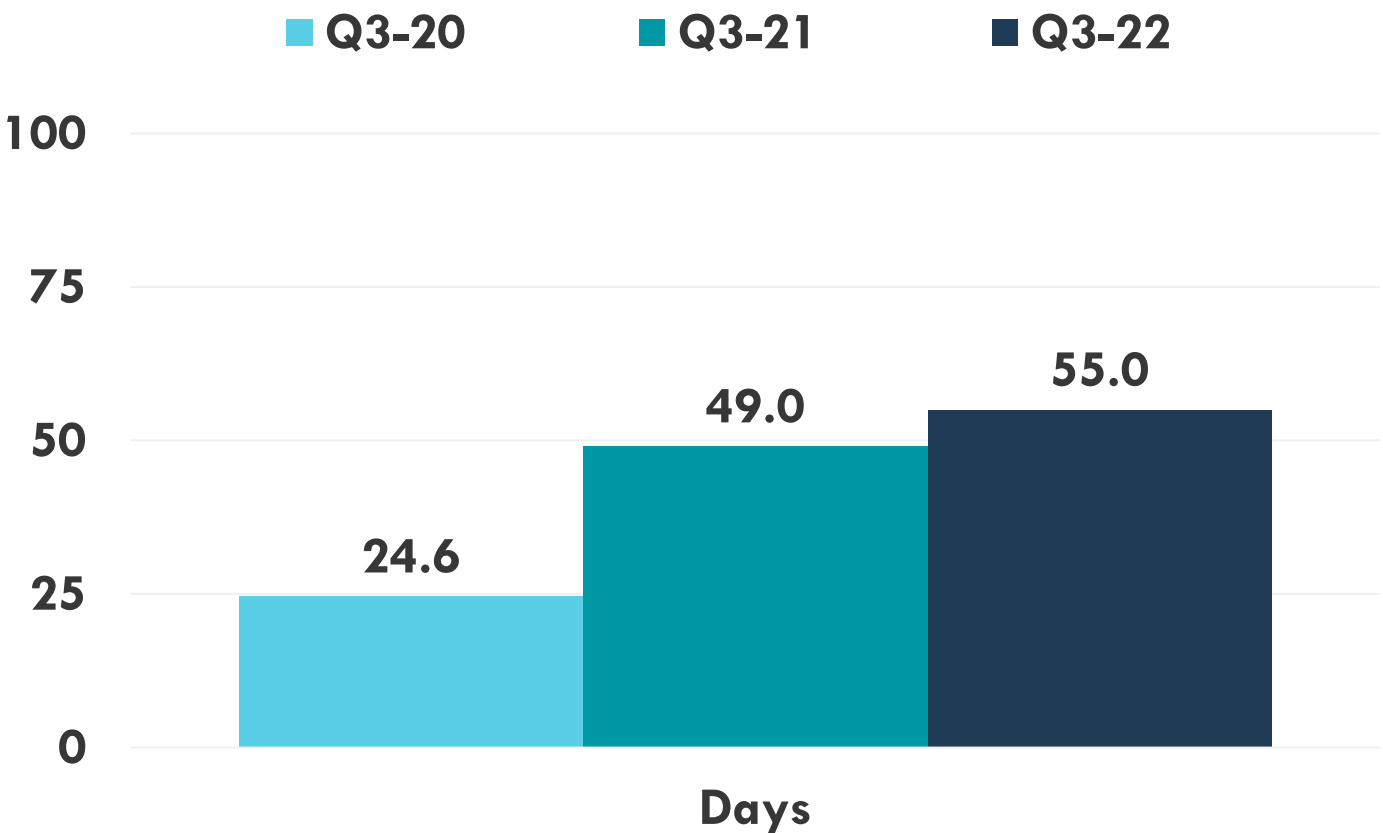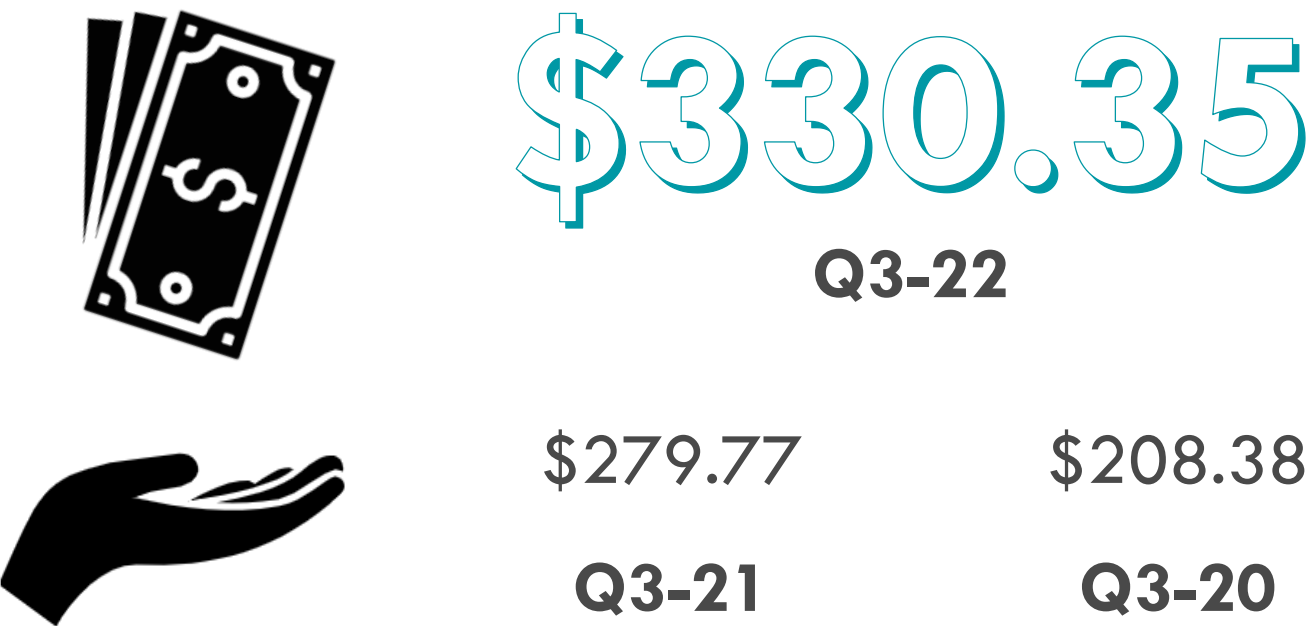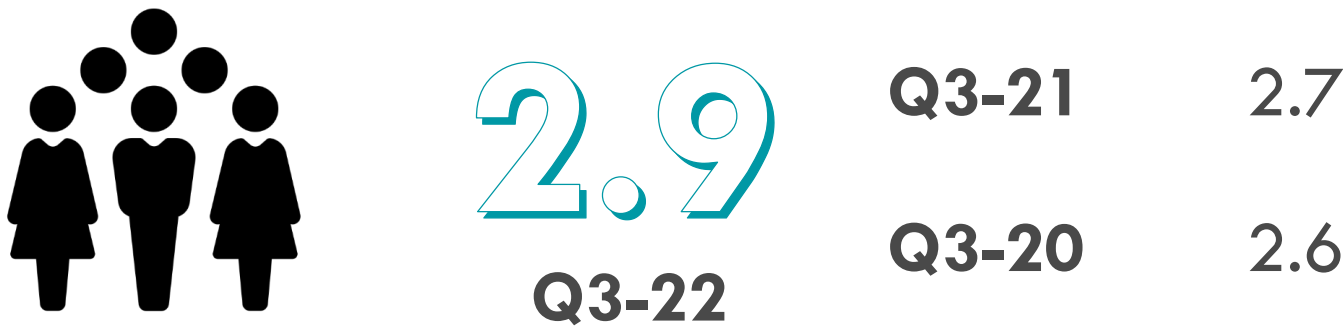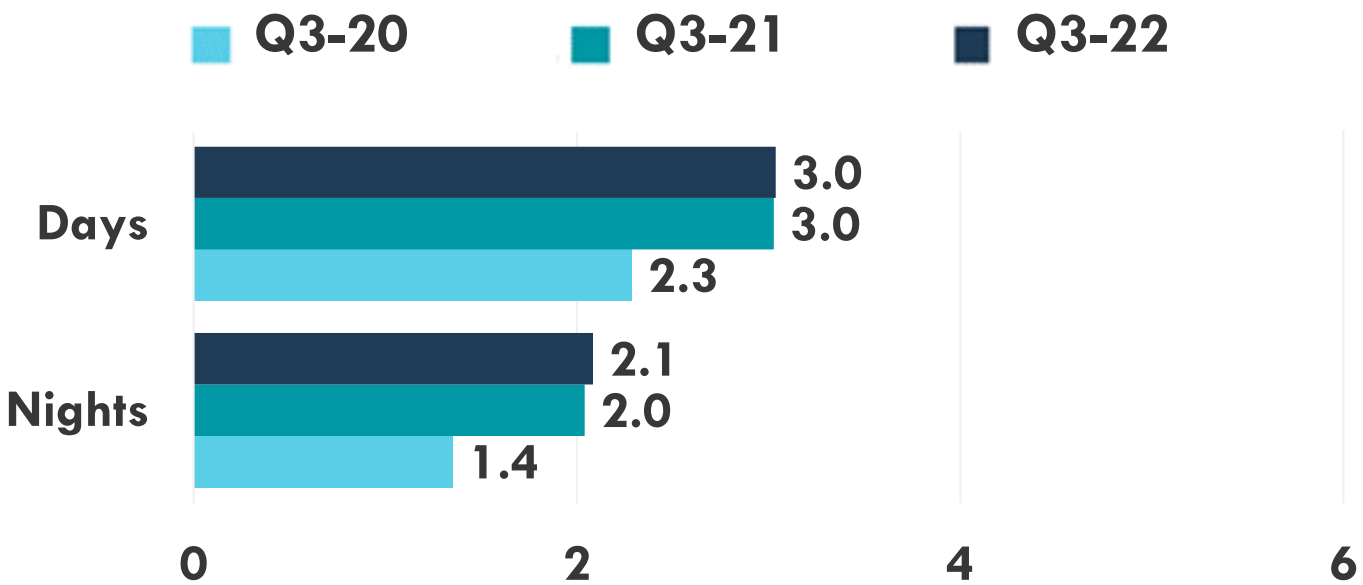
Percent Staying Overnight

24.1% Q3-20

38.0% Q3-21

36.5% Q3-22

Generations

- Millennial or younger
- Gen X
- Boomer or older

	Q3-20	Q3-21	Q3-22
Boomer or older	33.1%	37.7%	30.2%
Gen X	45.1%	44.6%	45.3%
Millennial or younger	21.7%	17.7%	24.5%

Average Age

- Q3-20
- Q3-21
- Q3-22

Age
- 46.2
- 48.2
- 47.0

0   20   40   60   80

Average Income

$115,951
Q3-22

Q3-21 $105,882

Q3-20 $90,587
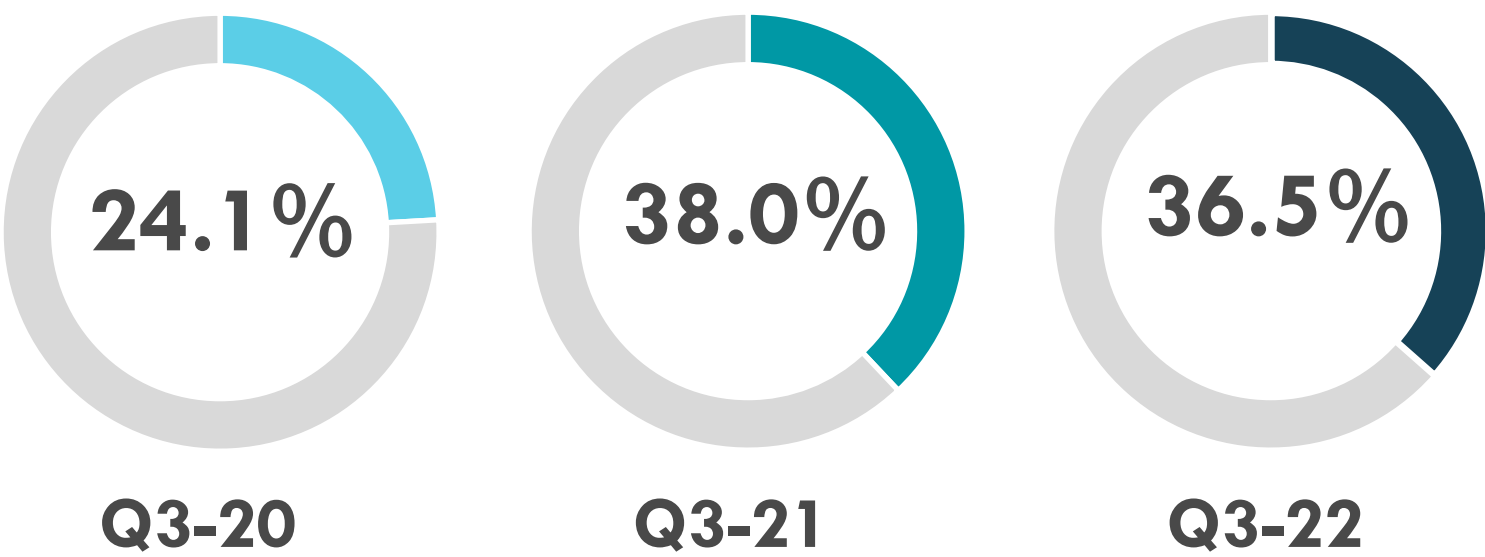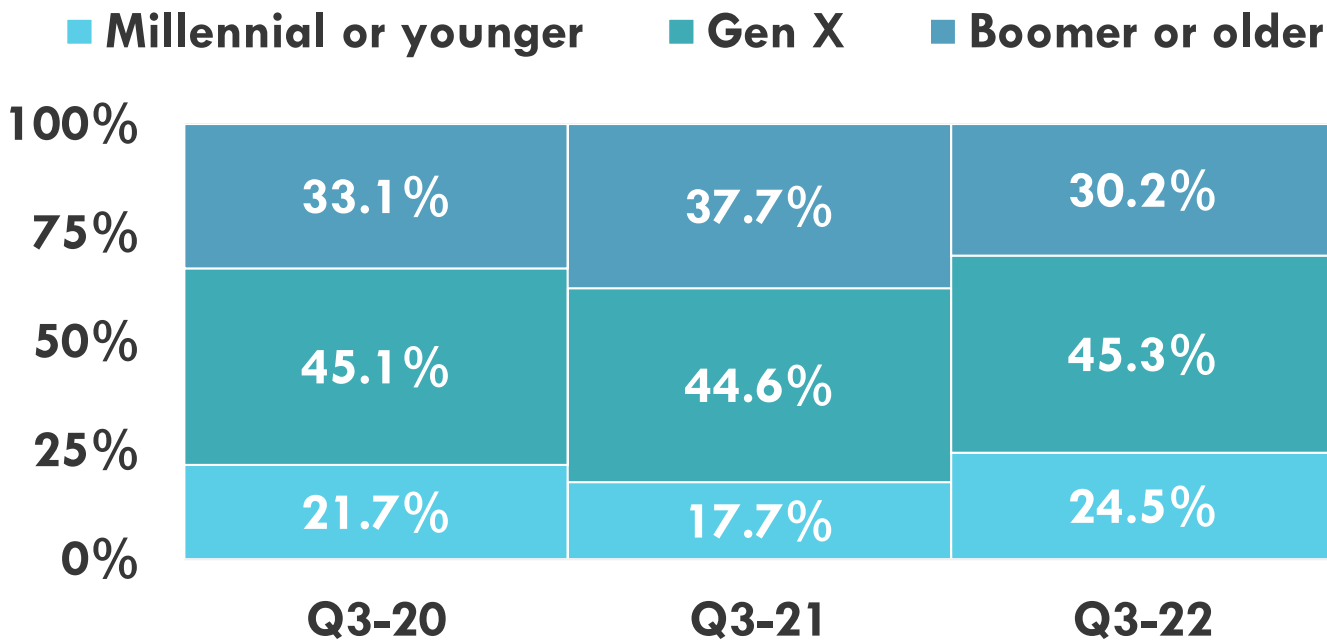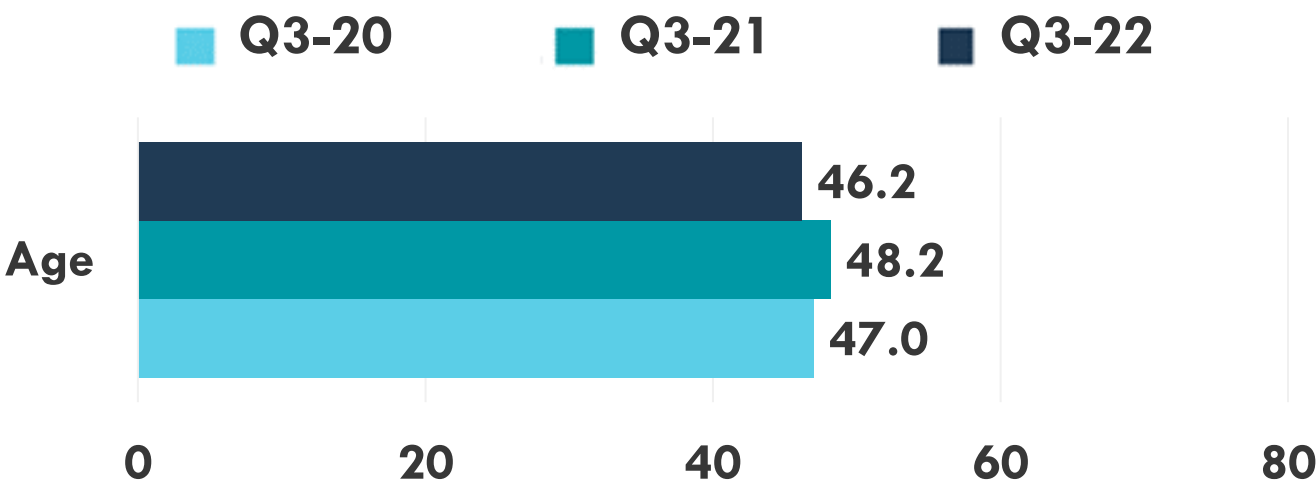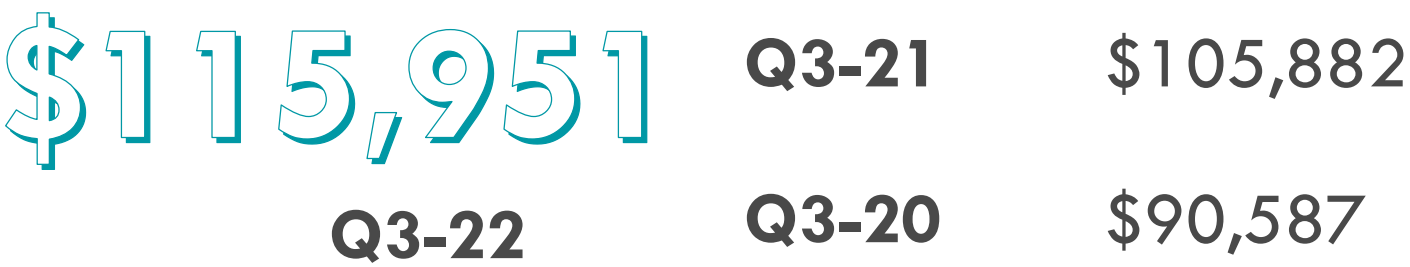
Q3 2022
Visitor Summaries
by Traveler Segment

THE BEACH GO-ER

Q3 2022

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

Factors Important to Destination Decision

Factor	Percentage
Scenic beauty	91.9%
Overall ambiance & atmosphere	80.0%
Attractions in the area	70.4%
Friends or family in the area	49.9%
Weather	47.3%
Restaurants, cuisine, food scene	40.7%
Easy to get to	34.1%

Domestic vs. International

United States Resident, 98.9%

International Visitor, 1.1%

POINT OF ORIGIN: TOP STATES

State	Percentage
Florida	18.9%
Ohio	7.0%
Illinois	6.3%

Top Communities Visited

Community	Percentage
Madeira Beach	45.4%
Clearwater Beach	43.4%
St. Petersburg	33.7%
Treasure Island	27.8%
St. Pete Beach	19.7%

Top Activities

Activity	Percentage
Dining in restaurants	95.9%
Swimming	73.9%
Visit friends or family	53.5%
Shopping	42.2%
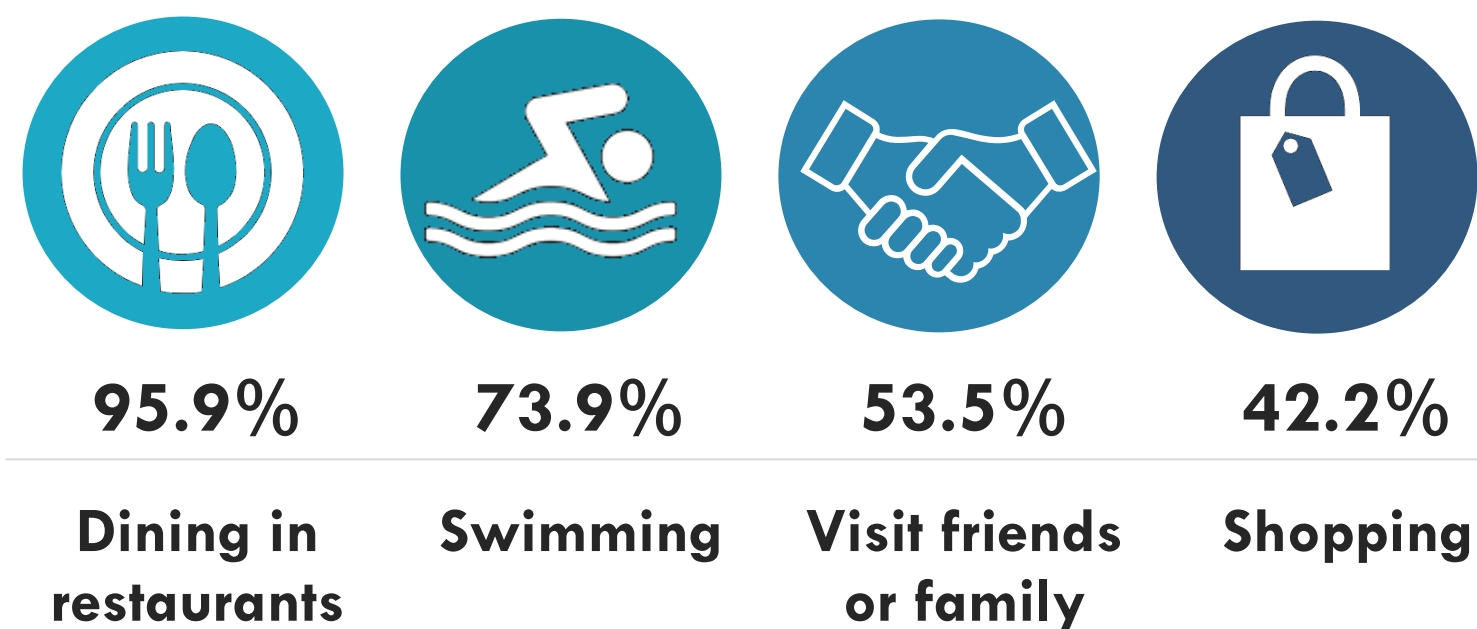
Length of Stay
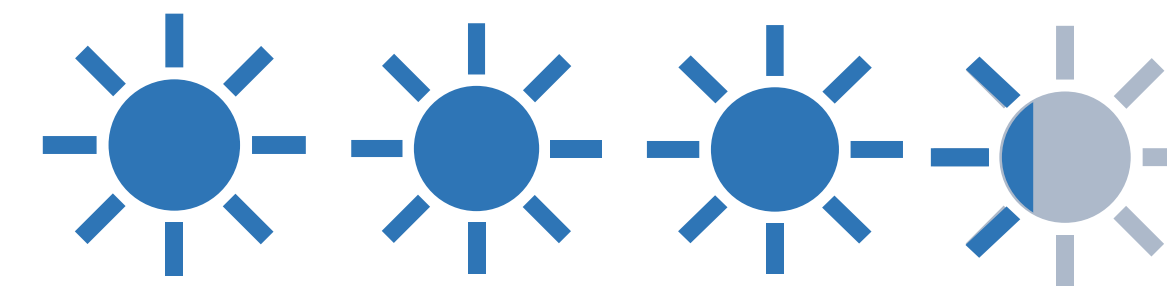
3.2 Days on Average

Travel Party Size

3.2 People

31.2% Traveled with Children

Daily Spending

$115.72 Per Person

THE ARTS & CULTURE VISITOR

Q3 2022

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

Factors Important to Destination Decision

- Attractions in the area — 80.7%
- Scenic beauty — 76.5%
- Overall ambiance & atmosphere — 62.4%
- Easy to get to — 52.1%
- Beaches that suit my tastes — 52.0%
- Restaurants, cuisine, food scene — 47.5%
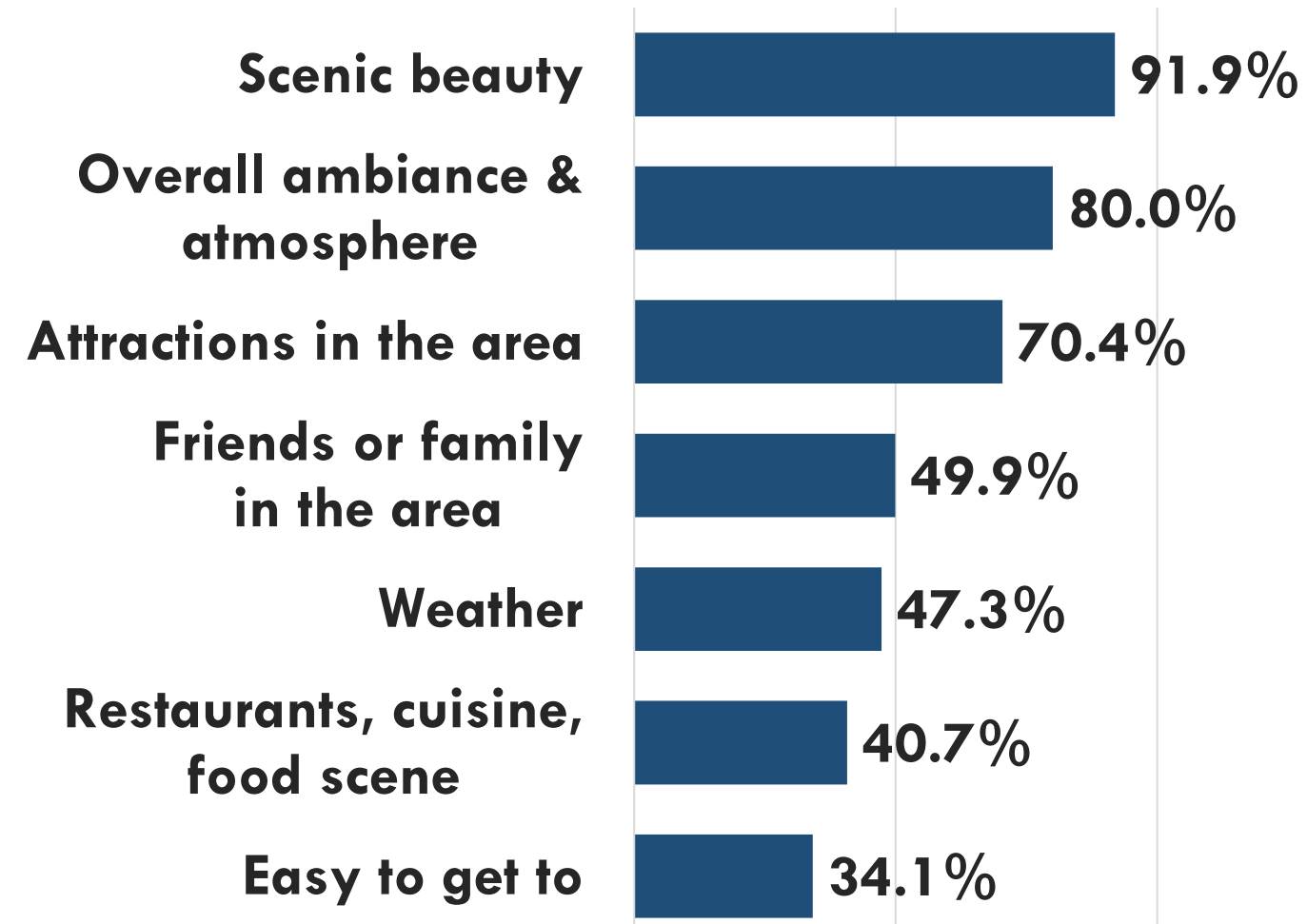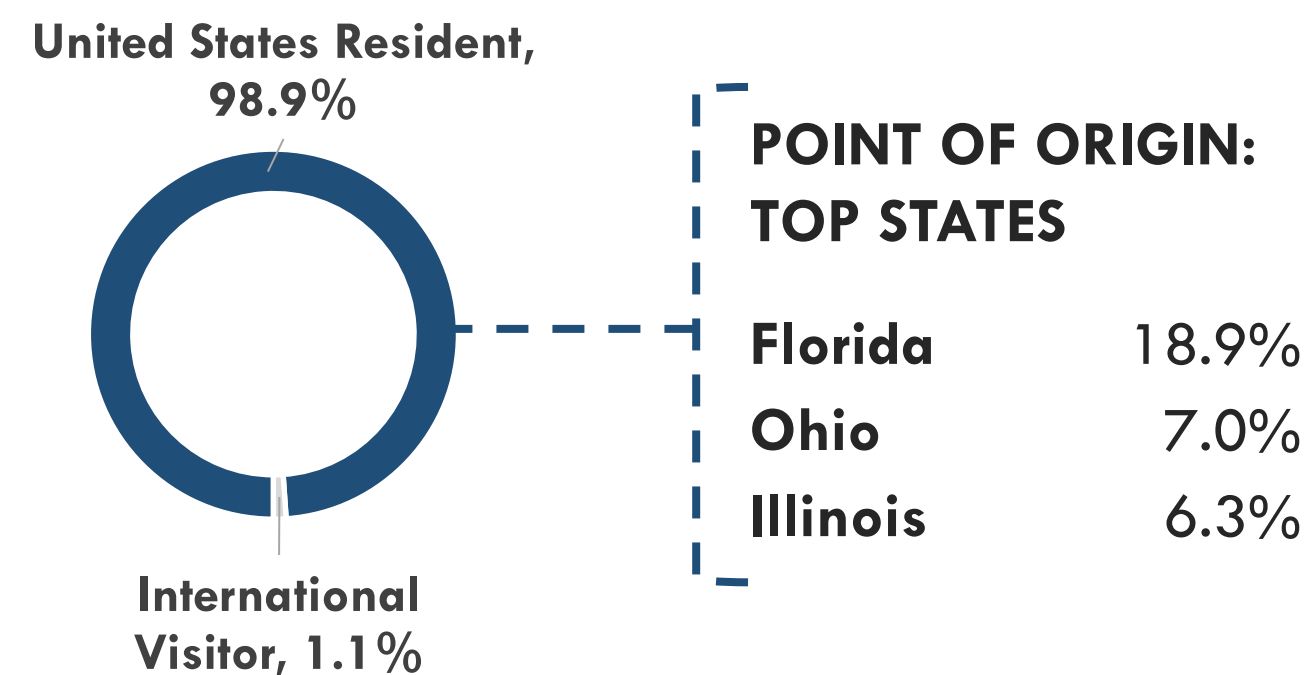
Domestic vs. International

United States Resident, 98.2%

International Visitor, 1.8%

POINT OF ORIGIN: TOP STATES

Florida	45.5%
Tennessee	6.9%
Kentucky	5.3%
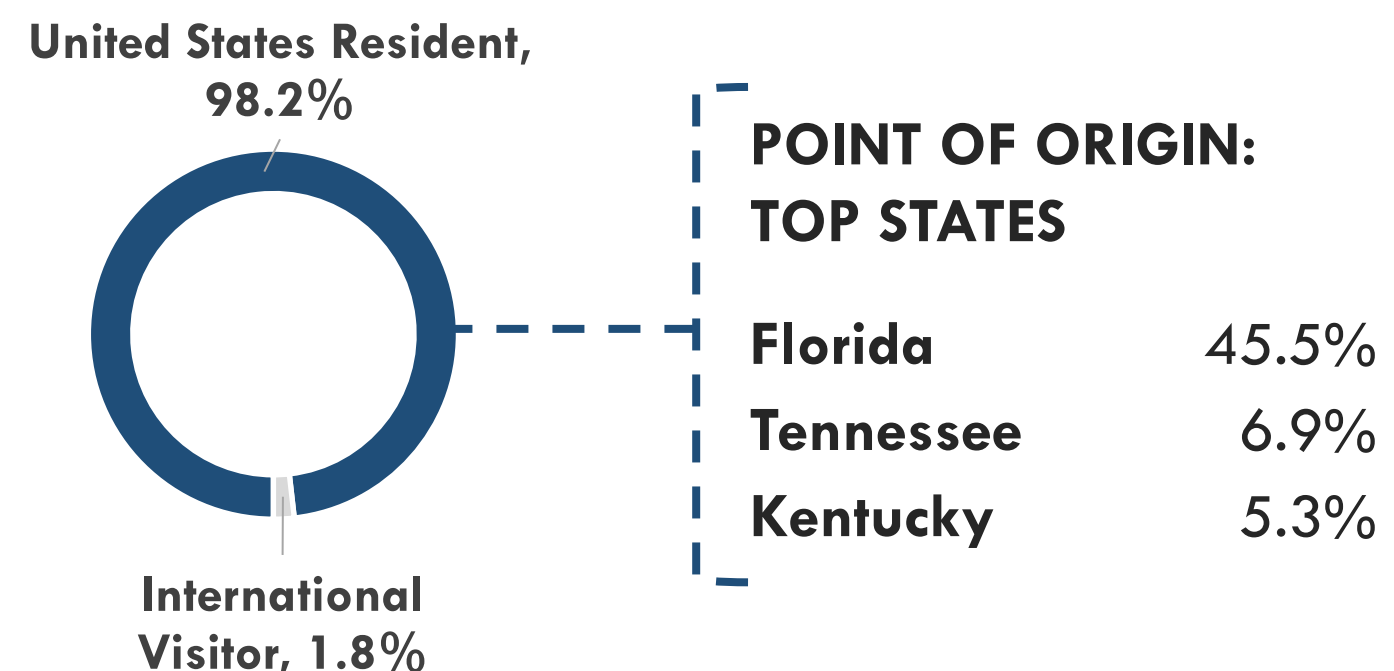
Top Communities Visited

St. Petersburg	94.0%
St. Pete Beach	22.2%
Madeira Beach	17.5%
Treasure Island	14.8%
Clearwater Beach	11.6%

Top Activities

91.4%	53.0%	47.1%	33.8%
Dining in restaurants	Visit the beach	Visit friends or family	Swimming
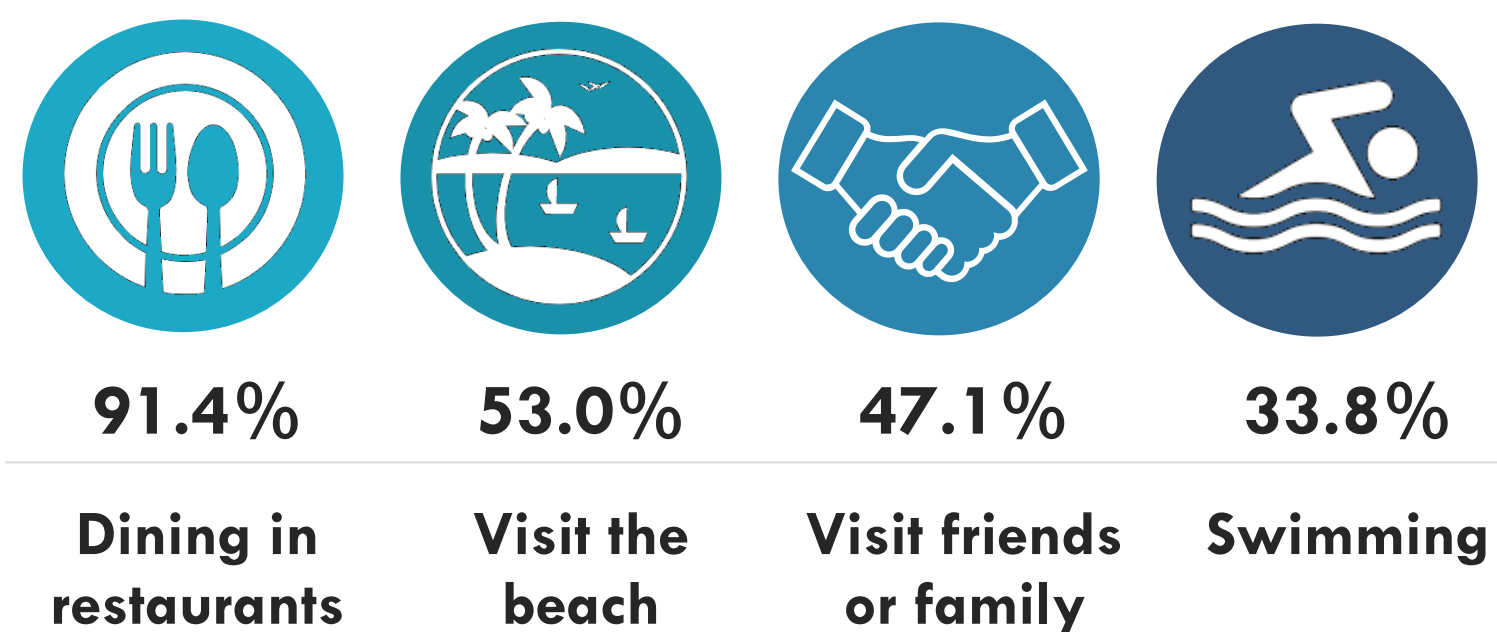
Length of Stay
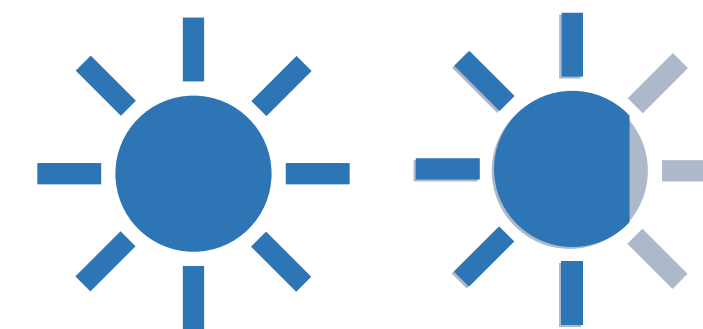
1.8 Days on Average

Travel Party Size

2.9 People

22.7% Traveled with Children

Daily Spending

$107.84 Per Person

Destination Analysts

THE AFFLUENT VISITOR

Q3 2022

Results presented here are reflective of visitors who reported having an annual household income of $150,000+
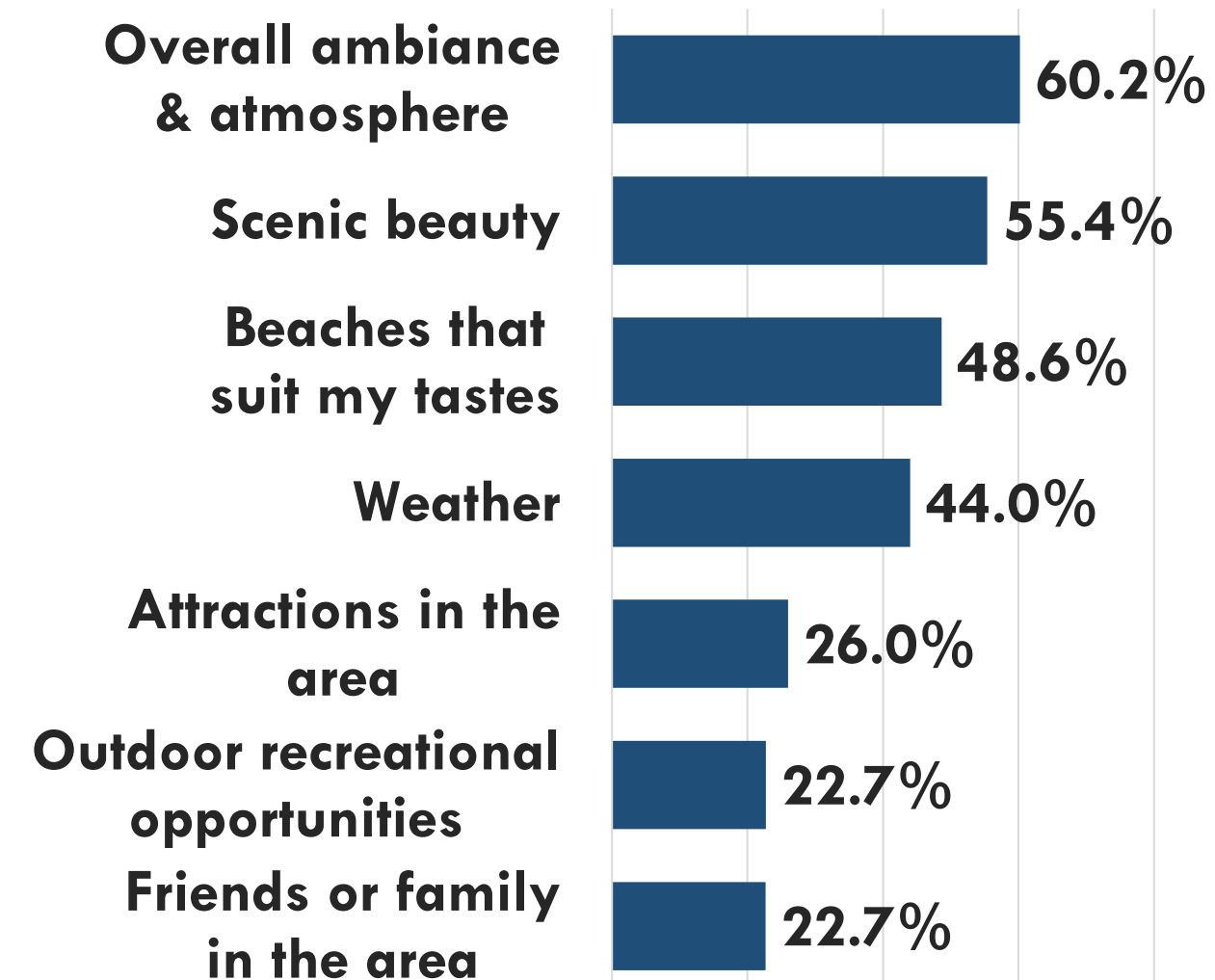
Domestic vs. International

United States Resident, 94.0%
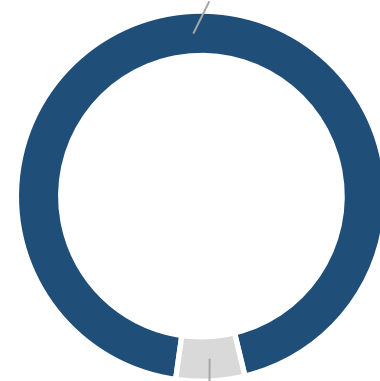
International Visitor, 6.0%

POINT OF ORIGIN: TOP STATES

Florida	42.8%
Massachusetts	8.8%
Illinois	7.9%

Top Communities Visited

St. Petersburg	52.4%
Madeira Beach	39.4%
Treasure Island	32.7%
Clearwater Beach	28.8%
St. Pete Beach	19.0%

Top Activities

76.6%	75.0%	43.8%	29.4%
Visit the beach	Dining in restaurants	Swimming	Shopping

Factors Important to Destination Decision

Overall ambiance & atmosphere	60.2%
Scenic beauty	55.4%
Beaches that suit my tastes	48.6%
Weather	44.0%
Attractions in the area	26.0%
Outdoor recreational opportunities	22.7%
Friends or family in the area	22.7%

Length of Stay

3.6 Days on Average

Travel Party Size

3.2 People

37.8% Traveled with Children
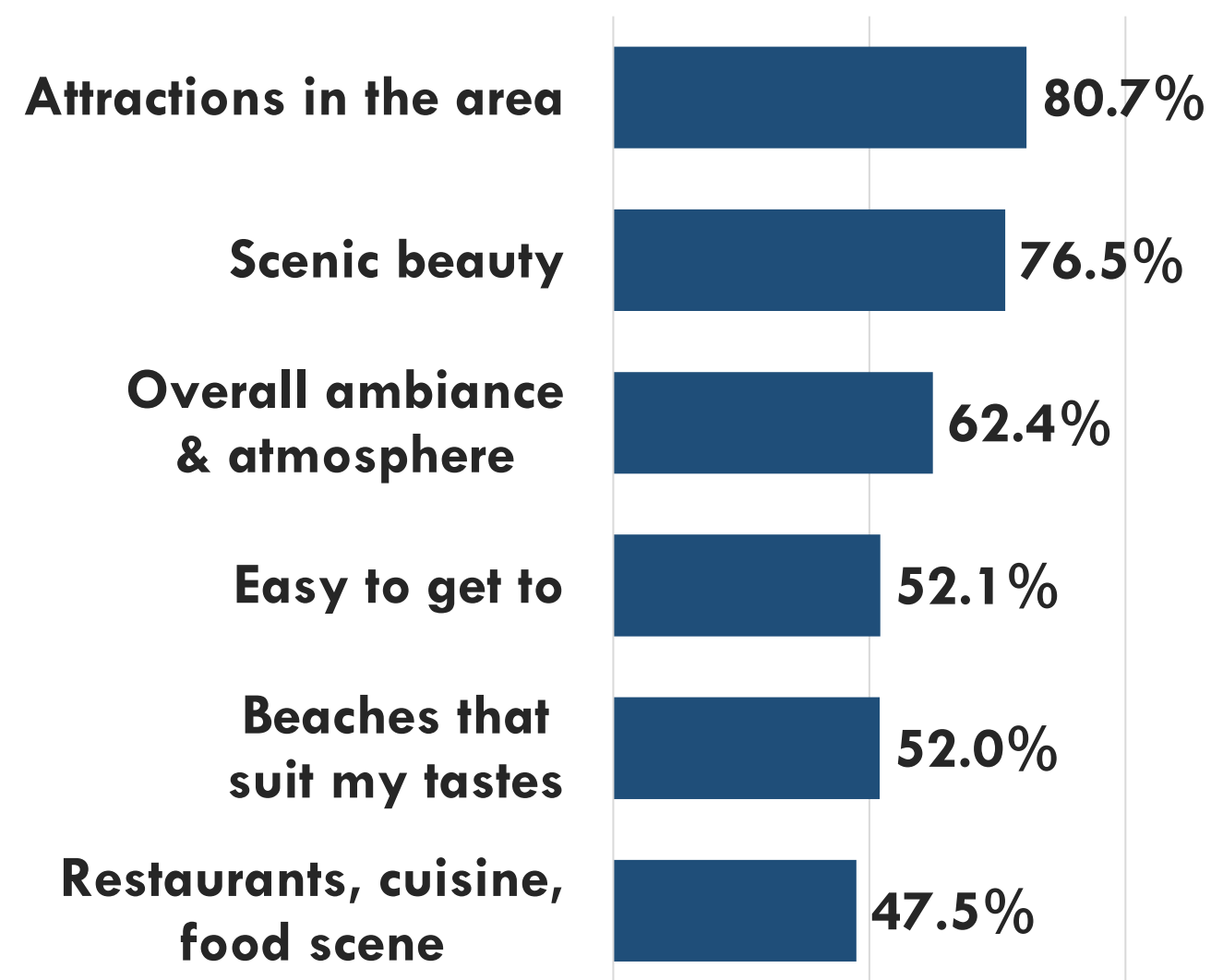
Daily Spending

$120.62

Per Person

THE FAMILY TRAVELER

Q3 2022

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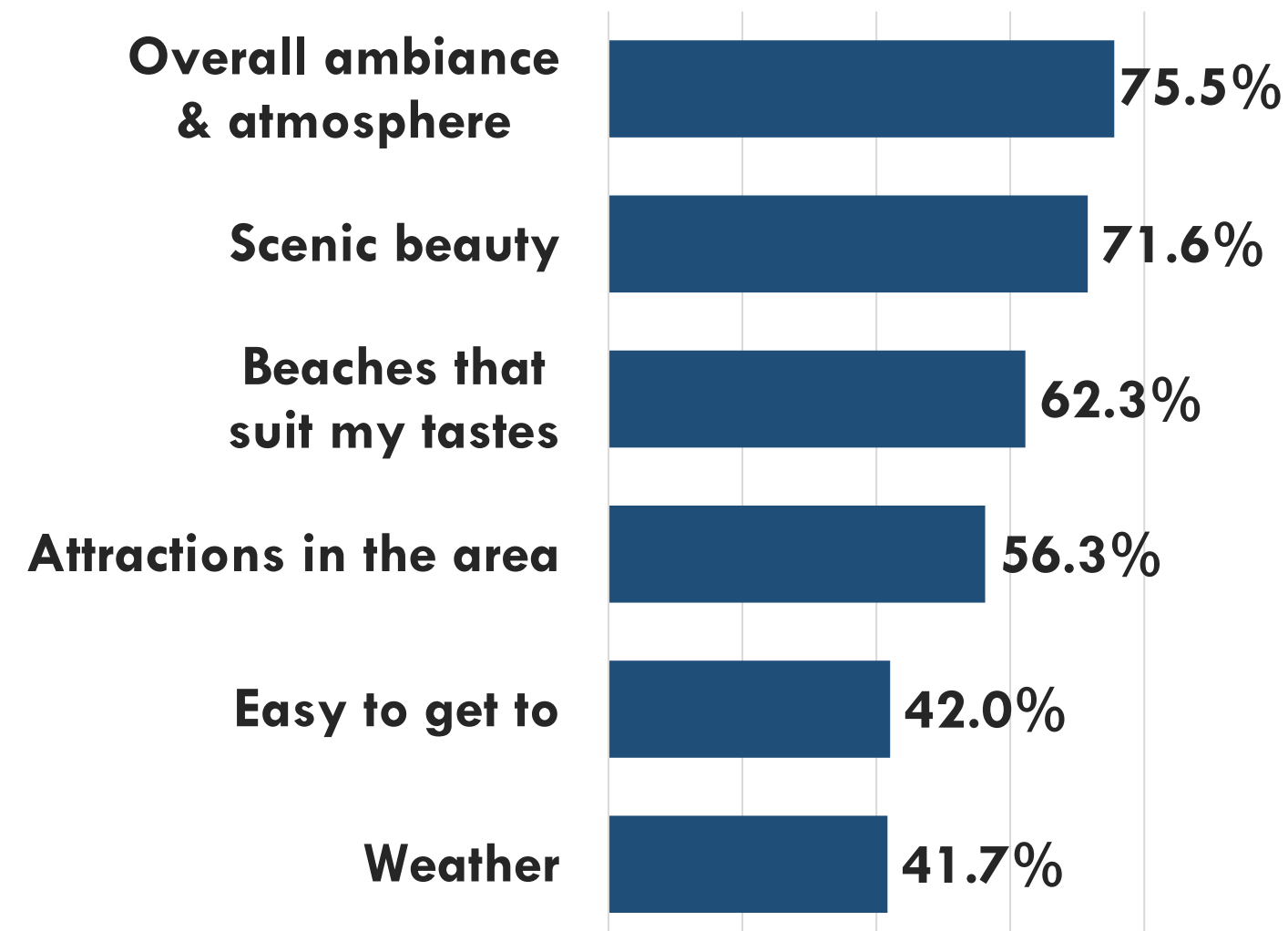
Domestic vs. International

United States Resident, 95.9%
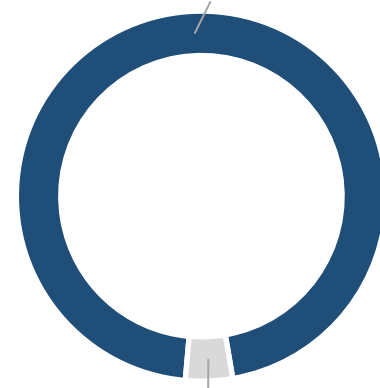
International Visitor, 4.1%

POINT OF ORIGIN: TOP STATES

Florida	27.2%
Ohio	6.5%
Indiana	5.9%

Length of Stay

3.0 Days on Average

Travel Party Size
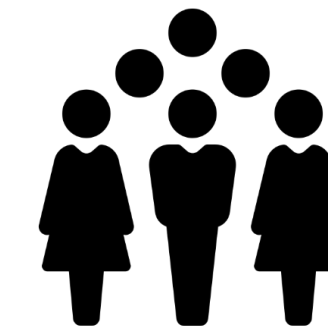
4.4 People

100% Traveled with Children

Factors Important to Destination Decision

Overall ambiance & atmosphere	75.5%
Scenic beauty	71.6%
Beaches that suit my tastes	62.3%
Attractions in the area	56.3%
Easy to get to	42.0%
Weather	41.7%

Top Communities Visited

Madeira Beach	46.7%
St. Petersburg	41.0%
Clearwater Beach	33.8%
Treasure Island	29.1%
St. Pete Beach	14.8%

Top Activities

91.4%	81.5%	67.3%	43.5%
Dining in restaurants	Visit the beach	Swimming	Visit friends or family

Daily Spending

$98.03

Per Person

Destination Analysts

Q3 2022
Visitor Summaries
by Generation

THE MILLENNIAL VISITOR

Q3 2022

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

Domestic vs. International

United States Resident, 97.6%

International Visitor, 2.4%

POINT OF ORIGIN: TOP STATES

Florida	46.8%
Ohio	11.0%
Kentucky	6.2%
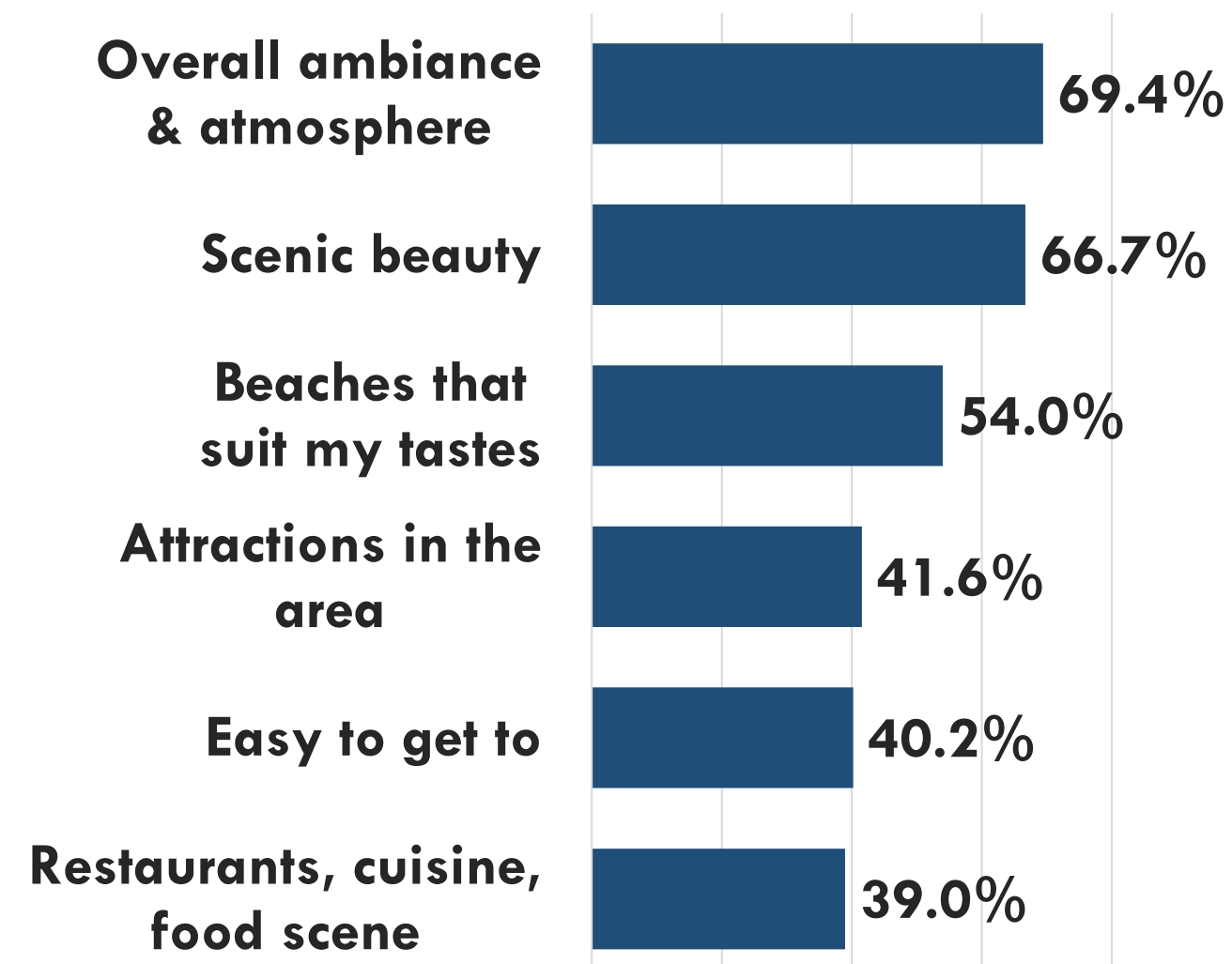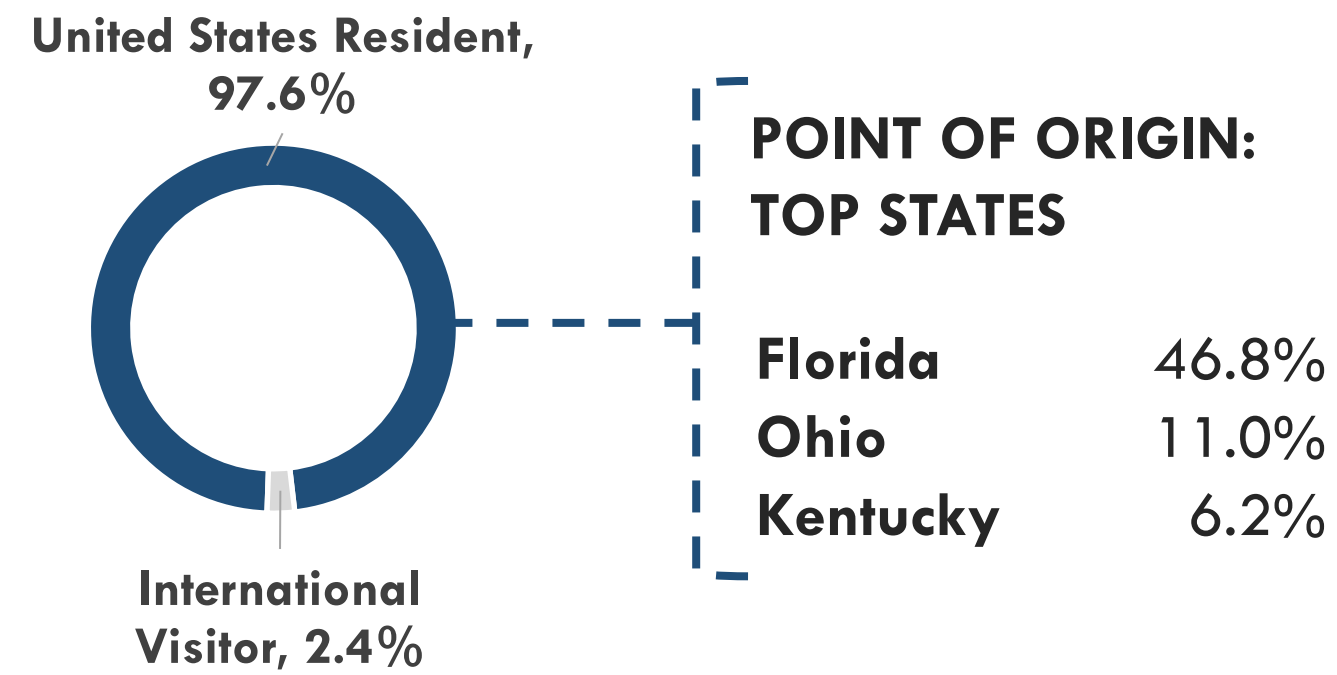
Top Communities Visited

Madeira Beach	46.6%
St. Petersburg	39.2%
Clearwater Beach	31.3%
St. Pete Beach	26.4%
Treasure Island	20.2%

Top Activities

91.2%	74.2%	51.9%	34.1%
Dining in restaurants	Visit the beach	Swimming	Shopping

Factors Important to Destination Decision

Overall ambiance & atmosphere	69.4%
Scenic beauty	66.7%
Beaches that suit my tastes	54.0%
Attractions in the area	41.6%
Easy to get to	40.2%
Restaurants, cuisine, food scene	39.0%
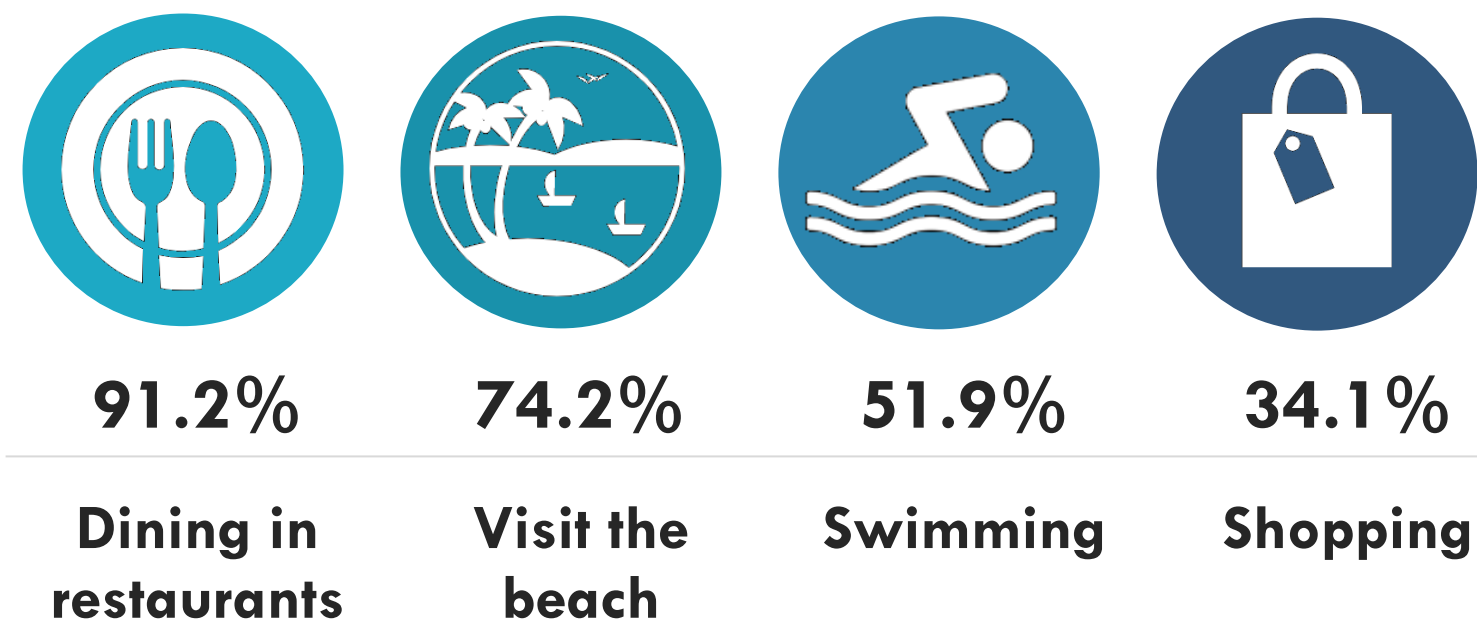
Length of Stay
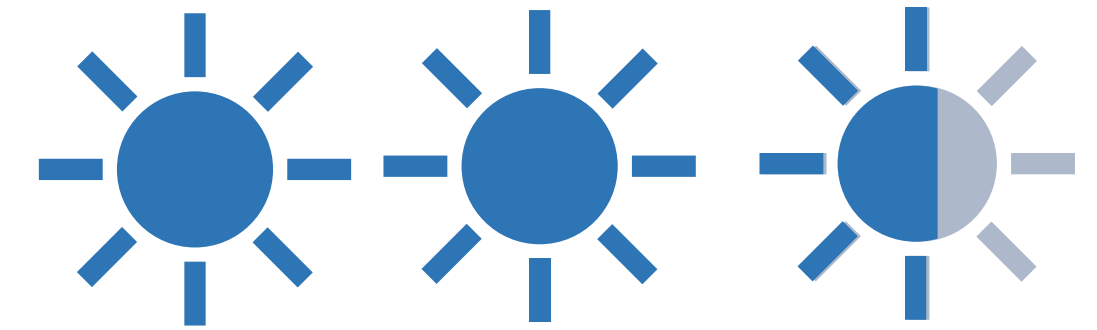
2.6 Days on Average

Travel Party Size

2.8 People

17.2% Traveled with Children

Daily Spending
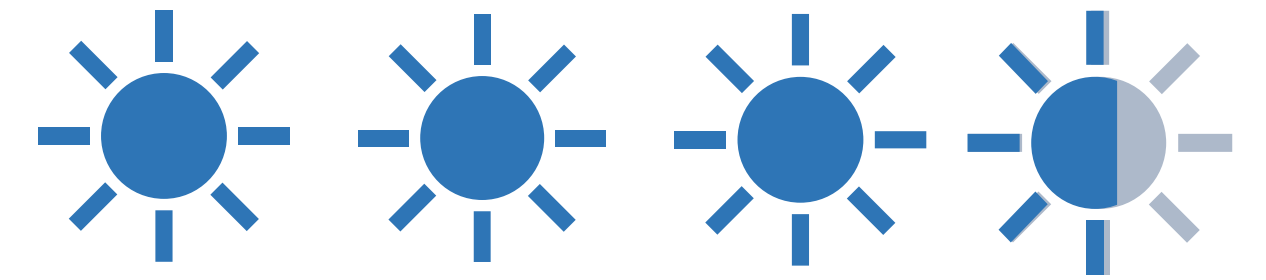
$103.45 Per Person

THE GEN X VISITOR

Q3 2022

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

Factors Important to Destination Decision

- Overall ambiance & atmosphere — **73.6%**
- Scenic beauty — **73.2%**
- Weather — **51.9%**
- Beaches that suit my tastes — **50.3%**
- Attractions in the area — **41.7%**
- Easy to get to — **39.6%**

Domestic vs. International

United States Resident, 97.0%

International Visitor, 3.0%

POINT OF ORIGIN: TOP STATES

Florida	30.1%
Ohio	7.1%
Indiana	5.0%
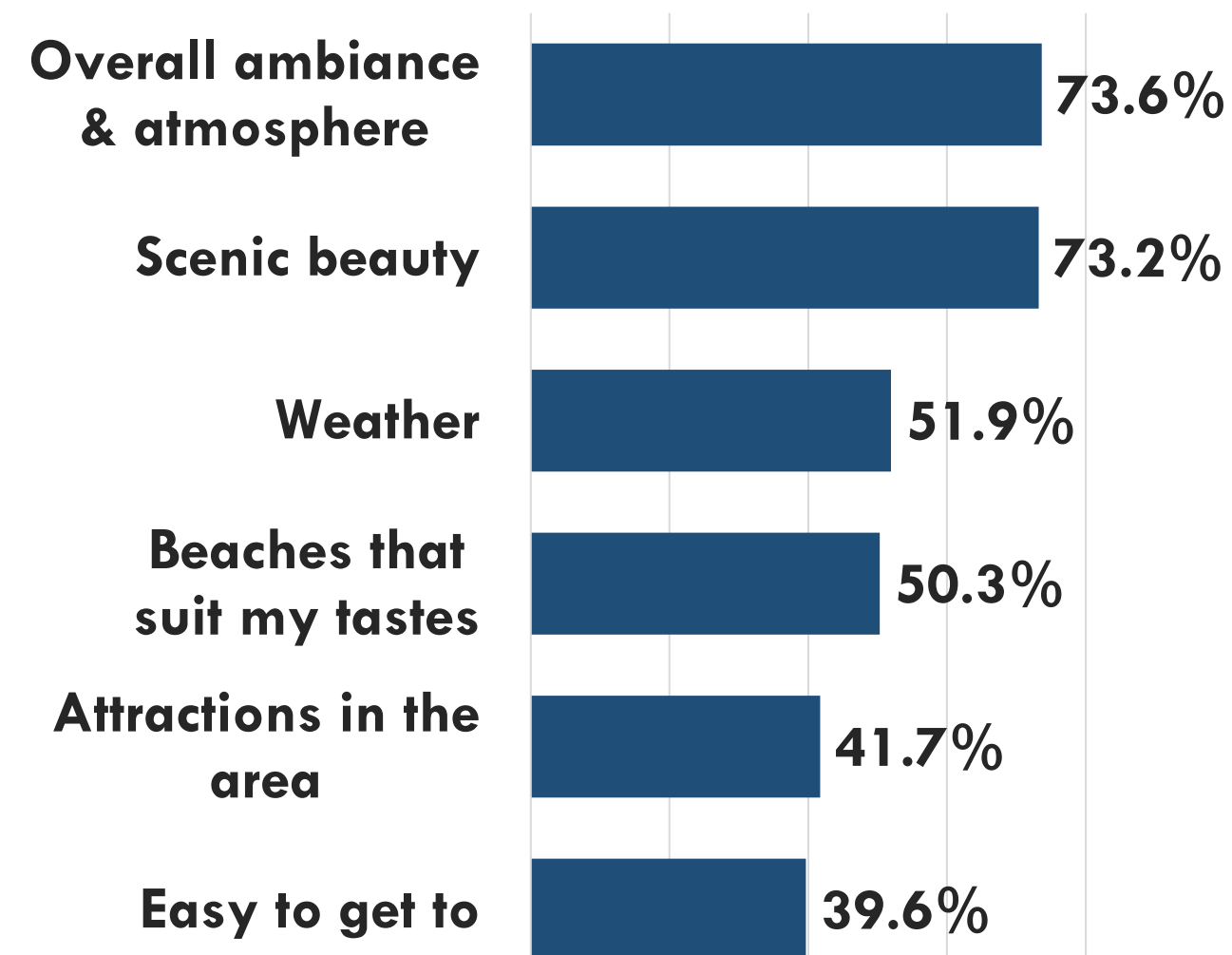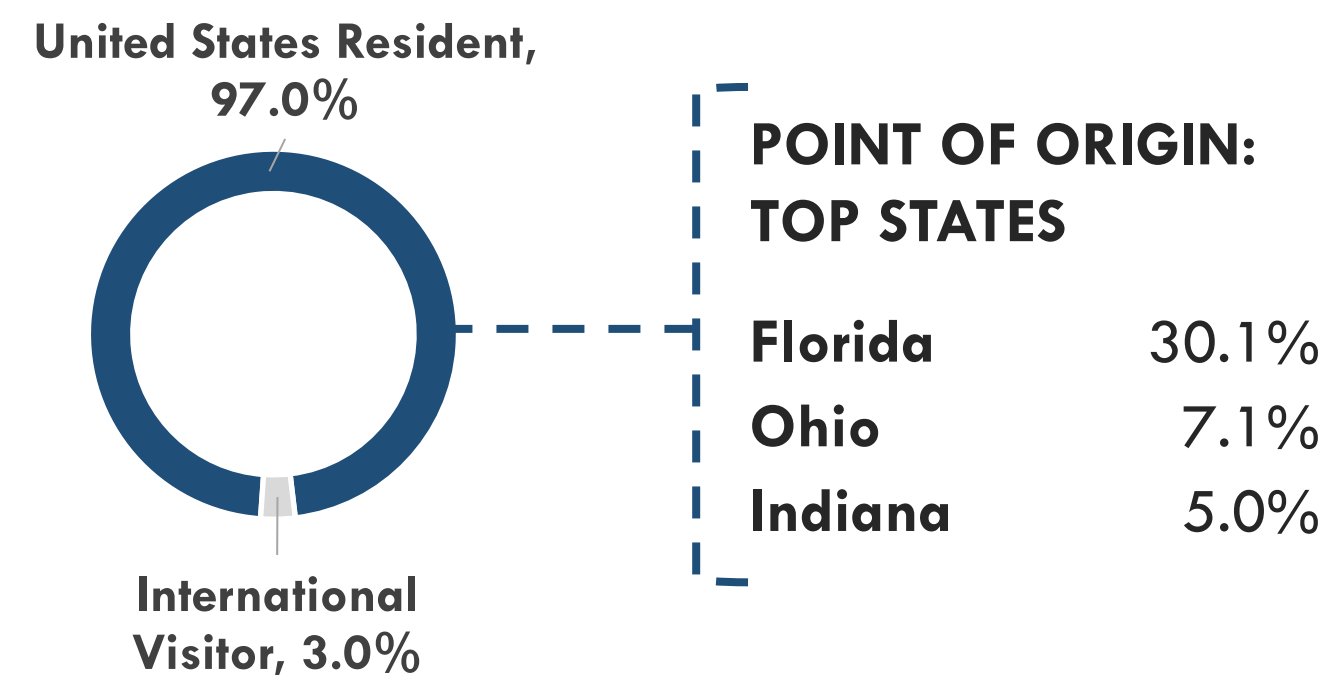
Top Communities Visited

Madeira Beach	51.6%
St. Petersburg	44.1%
Treasure Island	30.8%
Clearwater Beach	29.1%
St. Pete Beach	20.4%

Top Activities

86.2%	77.4%	52.5%	43.2%
Dining in restaurants	Visit the beach	Swimming	Shopping
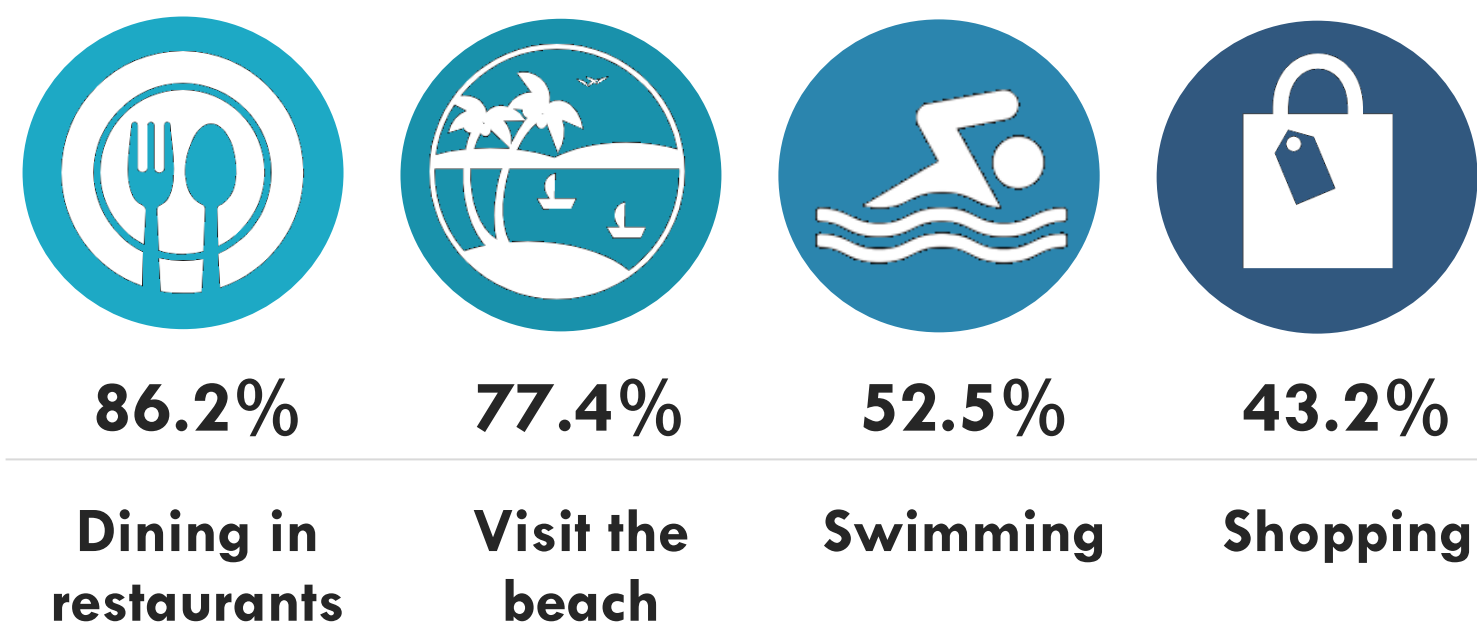
Length of Stay
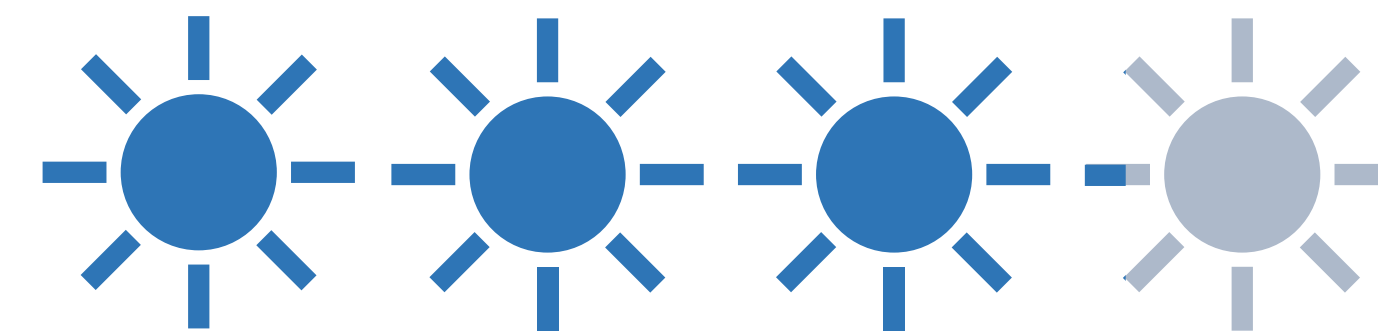
3.1 Days on Average

Travel Party Size
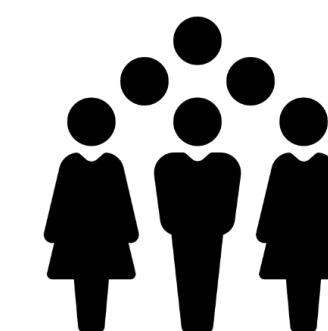
3.1 **People**

43.9% Traveled with Children

Daily Spending

$119.67 Per Person

THE BABY BOOMER VISITOR

Q3 2022

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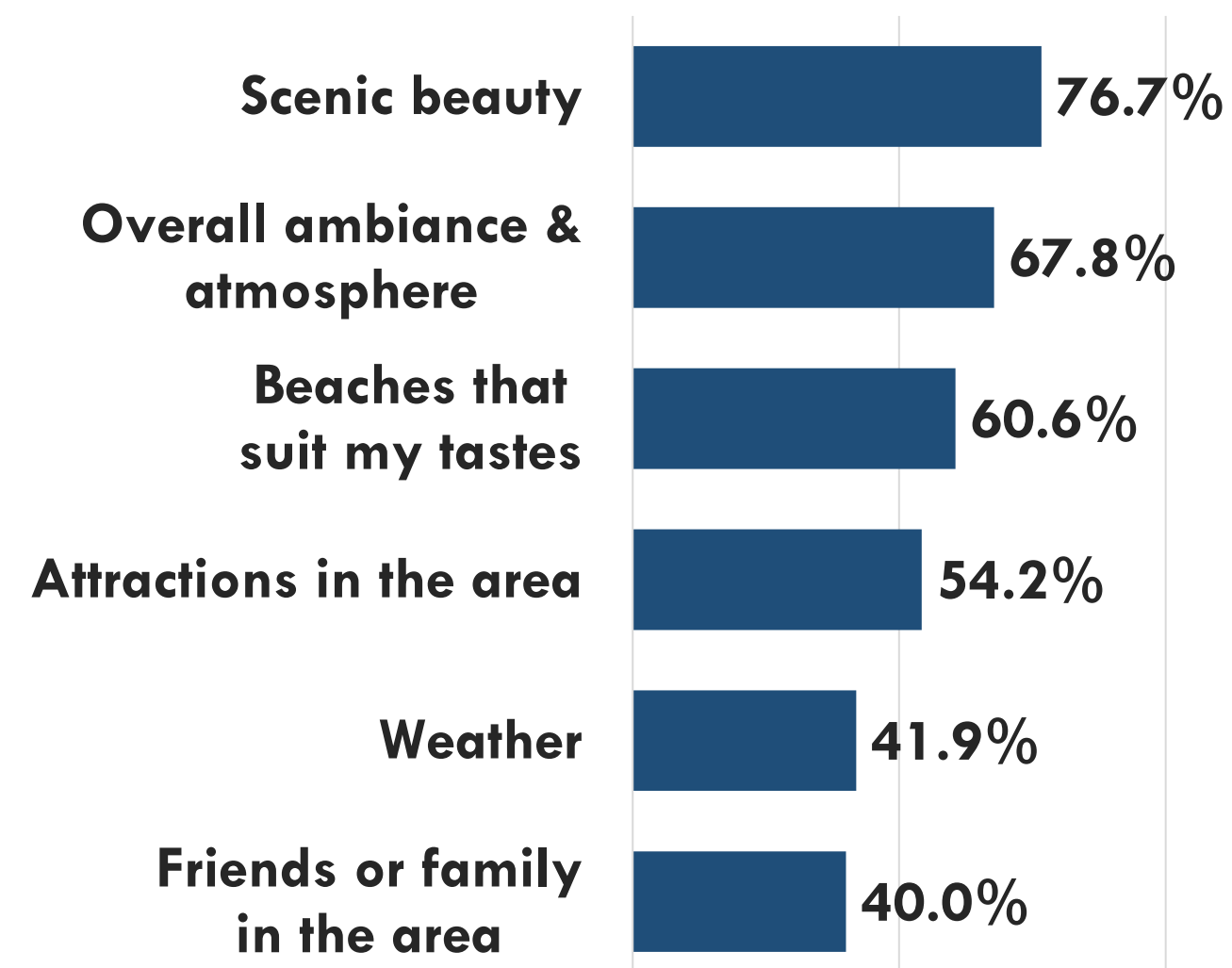
Domestic vs. International

United States Resident, 97.1%
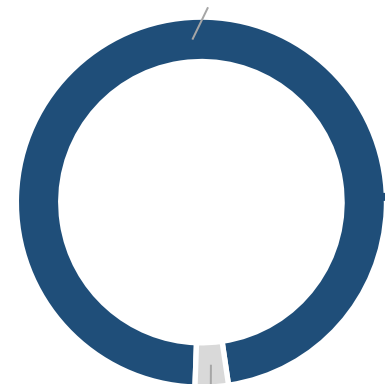
International Visitor, 2.9%

POINT OF ORIGIN: TOP STATES

Florida	32.6%
Illinois	6.1%
New York	5.9%

Top Communities Visited

St. Petersburg	47.9%
Madeira Beach	43.5%
Clearwater Beach	28.8%
St. Pete Beach	19.3%
Treasure Island	18.5%

Top Activities

86.9%	74.5%	43.5%	42.5%
Dining in restaurants	Visit the beach	Swimming	Visit friends or family

Factors Important to Destination Decision

Scenic beauty	76.7%
Overall ambiance & atmosphere	67.8%
Beaches that suit my tastes	60.6%
Attractions in the area	54.2%
Weather	41.9%
Friends or family in the area	40.0%

Length of Stay
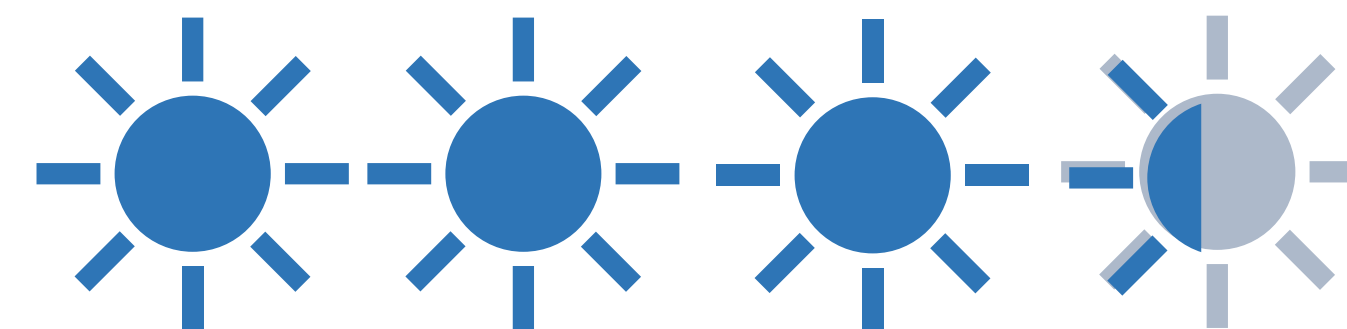
3.4 Days on Average

Travel Party Size
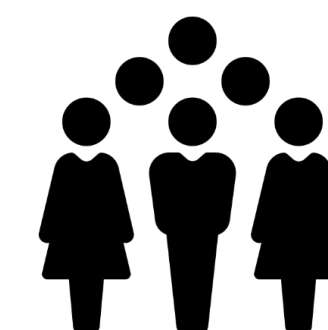
2.7 People

5.5% Traveled with Children

Daily Spending

$125.34 Per Person

Planning the St. Pete/Clearwater Trip

WHEN DECISION TO VISIT WAS MADE

On average, St. Pete/Clearwater visitors decided to visit Pinellas County approximately 7.9 weeks (55.0 days) prior to their actual arrival date – slightly up from 7.0 weeks (49.0 days) in Q3 2021. Similar to Q3 2021, hotel guests made the decision to visit an average of 3.4 months in advance (103.3 days compared to 96.4 days in Q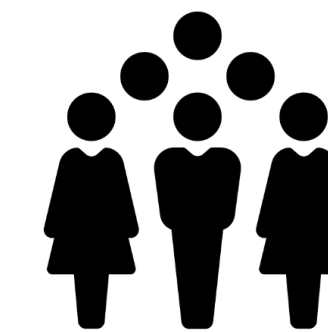3 2021), VFRs decided 68.3 days in advance (2.8 months) – up from 66.0 days (2.2 months) in Q3, 2021, and day trippers made the decision 31.7 days in advance, up from Q3 2021 with 24.8 days.

Figure 1: Average Time Between Decision to Visit and Arrival

55.0 Days
in Advance

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. 1,999 responses.

Detail by Type of Visitor

	Hotel	VFR	Day Trip
Average Days	103.3	68.3	31.7
Sample Size:	**469**	**121**	**241**

IMPORTANT FACTORS TO DESTINATION DECISION

Scenic beauty (73.2%) and overall ambiance & atmosphere (70.5%) were the top factors driving visitation the destination in Q3 2022. These were followed by beaches (54.6%), attractions (46.4%) and weather (44.9%).

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

Figure 2: Important to Decision to Visit
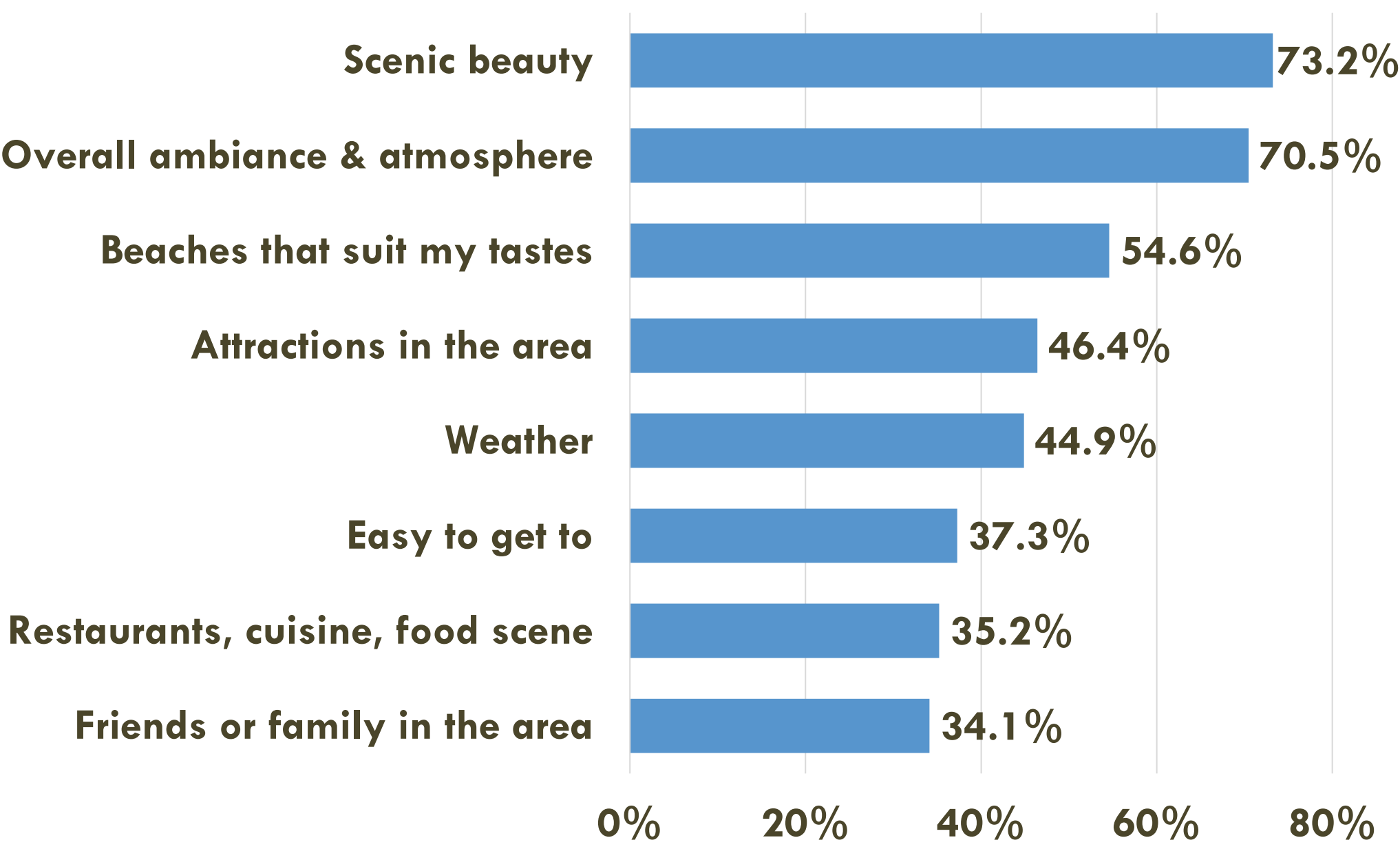
Factor	Percentage
Scenic beauty	73.2%
Overall ambiance & atmosphere	70.5%
Beaches that suit my tastes	54.6%
Attractions in the area	46.4%
Weather	44.9%
Easy to get to	37.3%
Restaurants, cuisine, food scene	35.2%
Friends or family in the area	34.1%

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. 1,184 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Scenic beauty	75.4%	79.5%	71.5%
Overall ambiance & atmosphere	74.7%	74.3%	65.1%
Beaches that suit my tastes	62.2%	49.1%	51.4%
Attractions in the area	44.9%	34.4%	48.7%
Weather	71.9%	53.0%	30.9%
Easy to get to	19.7%	31.5%	42.4%
Restaurants, cuisine, food scene	33.9%	31.0%	34.7%
Friends or family in the area	19.2%	66.6%	36.9%
Sample Size:	**455**	**121**	**241**

IMPORTANT FACTORS TO DESTINATION DECISION – FULL DETAIL

	Total	Hotel	VFR	Day Trip
Scenic beauty	73.2%	75.4%	**79.5%**	71.5%
Overall ambiance & atmosphere	70.5%	74.7%	74.3%	65.1%
Beaches that suit my tastes	54.6%	**62.2%**	49.1%	51.4%
Attractions in the area	46.4%	44.9%	34.4%	48.7%
Weather	44.9%	**71.9%**	53.0%	30.9%
Easy to get to	37.3%	19.7%	31.5%	**42.4%**
Restaurants, cuisine, food scene	35.2%	33.9%	31.0%	34.7%
Friends or family in the area	34.1%	19.2%	**66.6%**	36.9%
Arts & cultural offerings	19.3%	8.5%	11.1%	**25.1%**
Recommendation from people I know	13.6%	8.6%	**26.3%**	10.4%
Outdoor recreational opportunities	13.4%	**28.1%**	12.4%	9.1%
Shopping opportunities	10.4%	11.0%	8.3%	10.9%
The area's unique culture	8.4%	7.9%	3.0%	9.7%
The St.Pete/Clearwater area is family-friendly	7.5%	14.0%	5.2%	5.7%
Appealing hotels/resorts and other lodging options	7.2%	**23.6%**	0.0%	1.4%
St. Pete Pier	7.0%	2.8%	2.8%	9.5%
The St.Pete/Clearwater area is romantic	4.9%	**13.3%**	1.7%	3.1%
Special event(s) and/or festival(s)	4.8%	2.2%	2.5%	6.3%
Articles, features, reviews, etc. about the area	3.8%	7.6%	0.8%	2.1%
Good deal on airfare	2.0%	4.3%	1.0%	1.3%
Good hotel rate	1.7%	5.8%	0.0%	0.0%
Fishing opportunities	1.5%	1.4%	1.0%	1.1%
Breweries/Distilleries/Craft beer scene	1.1%	0.7%	1.5%	1.2%
Golf	0.8%	0.4%	0.0%	1.0%
A specific attraction:	0.7%	0.4%	3.0%	0.6%
Advertisements for the area	0.6%	0.3%	0.0%	0.8%
Sports or sporting events	0.4%	0.4%	0.0%	0.4%
Lifelong desire to visit	0.4%	0.8%	0.0%	0.3%
Base	**1,184**	**455**	**121**	**241**

Differences seen amongst visitor types:

- Across all segments, VFRs were the most likely to say that St. Pete/Clearwater's scenic beauty was the most important factor when deciding to visit the destination (79.5%), while hotel guests were likelier than VFRs and day-trippers to say beaches (62.2%), weather (71.9%) and outdoor recreational opportunities (28.1%) were important factors.

- Hotel guests also had a higher propensity to say that appealing lodging options (23.6%), and romantic appeal (13.3%) were important to the decision to visit.

- Day trippers were the likeliest to say that easy to get to (42.4%), as well as arts & cultural offerings (25.1%) were the reason they decided 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. 1,184 responses.

TRAVEL PLANNING RESOURCES USED

In Q3 2022, respondents cited user-generated content/review websites, social media content and opinions of friends or relatives to be the most utilized travel planning resources. Of the visitor segments, VFRs were the likeliest to use the official tourism website VisitStPeteClearwater.com prior to arriving in the destination (36.7%).

Figure 3: Resources Used before Arrival and While In Market

	Used Before Arrival	Used In-Market
User-generated content/Review websites, such as Yelp and TripAdvisor	53.6%	42.0%
Social Media content	36.2%	34.1%
Opinions of friends or relatives	27.6%	14.6%
www.VisitStPeteClearwater.com	21.1%	0.4%
Online travel agencies (Expedia, Travelocity, etc.)	6.9%	0.0%
Radio programming	3.1%	1.5%
YouTube or other online videos	2.7%	0.9%
Television programming	2.4%	0.4%
Travel guides, brochures	0.9%	3.3%
Travel agency (traditional, offline)	0.7%	0.3%
Lifestyle or travel magazines	0.5%	0.4%
Newspaper travel section	0.4%	0.3%
Gulf to Bay St Pete/Clearwater Destination Magazine	0.0%	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. 1,199 responses.

Detail by Traveler Segment

	Hotel		VFR		Day Trip	
	Pre-Arrival	In-Market	Pre-Arrival	In-Market	Pre-Arrival	In-Market
User-generated content/Review websites, such as Yelp and TripAdvisor	55.7%	47.3%	57.1%	42.0%	51.4%	38.7%
Social Media content	38.9%	35.8%	49.0%	49.4%	31.1%	28.6%
Opinions of friends or relatives	16.8%	8.6%	36.7%	19.0%	31.8%	16.8%
www.VisitStPeteClearwater.com	**10.3%**	**0.0%**	**36.7%**	**0.0%**	**18.6%**	**0.4%**
Online travel agencies (Expedia, Travelocity, etc.)	6.6%	0.2%	12.2%	0.0%	3.8%	0.0%
Radio programming	0.4%	0.9%	0.0%	3.0%	4.6%	1.1%
YouTube or other online videos	4.7%	1.2%	1.0%	0.0%	2.2%	0.9%
Television programming	0.6%	0.7%	0.0%	1.0%	3.5%	0.0%
Travel guides, brochures	3.0%	9.8%	1.8%	5.8%	0.3%	0.5%
Travel agency (traditional, offline)	0.2%	0.0%	0.0%	0.0%	1.0%	0.3%
Lifestyle or travel magazines	0.5%	0.3%	0.0%	0.0%	0.4%	0.4%
Newspaper travel section	1.0%	1.4%	0.0%	0.0%	0.3%	0.0%
Gulf to Bay St Pete/Clearwater Destination Magazine	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sample Size:	**469**		**121**		**241**	

EARNED & PAID MEDIA RECALL

One-in-five of all responding visitors in Q3 2022 recalled seeing, hearing or reading earned media or advertisements/promotions for St. Pete/Clearwater in the past six months (18.0% -- down from 48.3% in Q3 2021).

Figure 4: Media Recall

Maybe/Not sure, 7.5%

Yes, 18.0%

No, 74.6%

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Yes	**19.0%**	**12.9%**	**19.8%**
No	74.1%	81.8%	72.1%
Maybe/Not sure	6.8%	5.3%	8.1%
Sample Size:	**468**	**121**	**241**
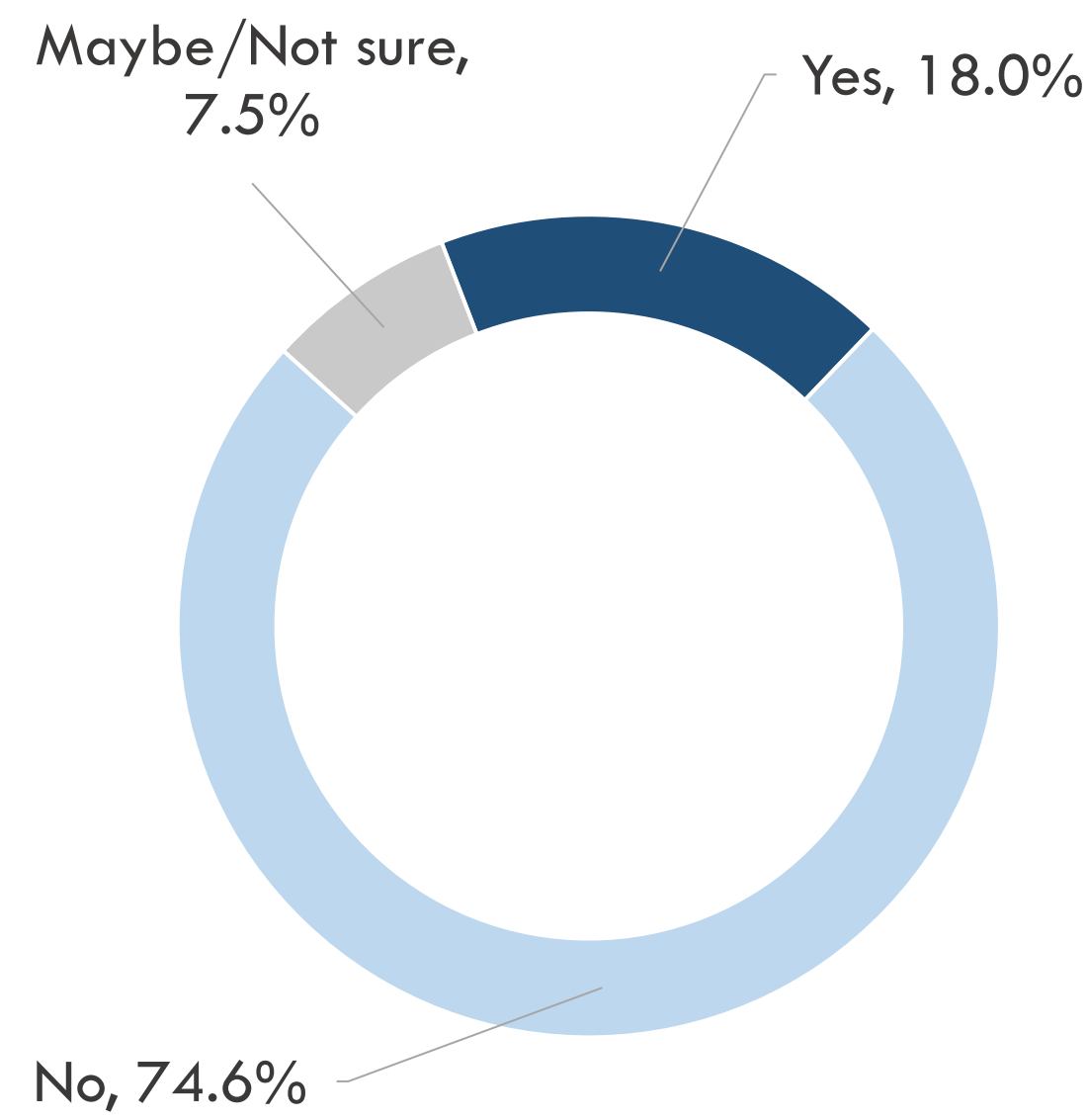
Question: In the last six months, have you seen, read, or heard any travel stories, advertising, or promotions for the St. Pete/Clearwater area? Base: All Respondents 1,198 responses.

Visitor Trip Details

PRIMARY REASON FOR VISIT

As has been the historic trend, vacation is the primary reason for a visit to St. Pete/Clearwater (64.2% - up from 51.1% in Q2 2021), followed by the desire to visit family and friends (18.9% - down from 28.2% in Q3 2022), a weekend getaway (9.2% - up from 6.0% in Q3 2022) or other personal reasons (4.9% - down from 11.8%). In Q3 2022, there was an increase in vacationers across all segments compared to Q3 2021; hotel guests 85.9% vs. 72.8%, VFRs 61.% vs. 28.1% and day trippers 51.7% vs. 33.2%.

Figure 5: Primary Reason for Visit

Reason	Percent
Vacation	64.2%
Visit friends or family in the area	18.9%
Weekend getaway	9.2%
Other personal reasons	4.9%
Attend special event	1.5%
Business	0.9%
Wedding	0.3%
Conference/tradeshow	0.1%
On or pre/post a cruise	0.0%
Attend sports event/tournament	0.0%
Honeymoon	0.0%
Government business/travel	0.0%
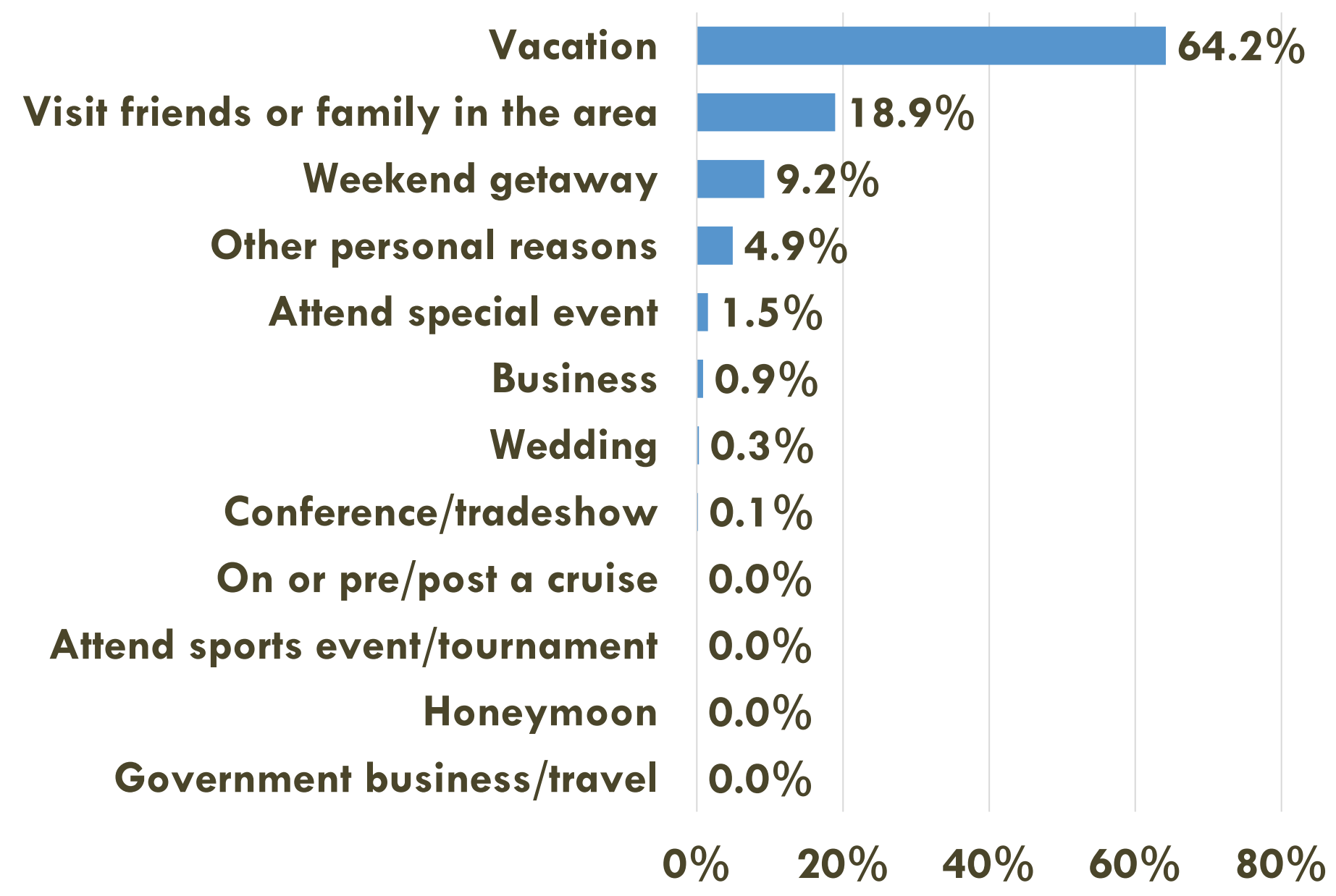
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Vacation	**85.9%**	**61.0%**	**51.7%**
Visit friends or family in the area	4.0%	30.8%	25.3%
Weekend getaway	6.2%	6.5%	12.0%
Other personal reasons	0.4%	0.0%	8.1%
Attend special event	0.0%	0.0%	2.5%
Business	2.5%	0.0%	0.5%
Wedding	0.3%	1.7%	0.0%
Conference/tradeshow	0.7%	0.0%	0.0%
On or pre/post a cruise	0.0%	0.0%	0.0%
Attend sports event	0.0%	0.0%	0.0%
Honeymoon	0.0%	0.0%	0.0%
Government business/travel	0.0%	0.0%	0.0%
Sample Size:	468	121	190

Question: What is your primary reason for visiting the St. Pete/Clearwater Area? (Select one)
Base: All Respondents. 1,146 responses.

METHOD OF ARRIVAL & DEPARTURE

The top methods of arrival in Q3 2022 continue to be personal vehicle (59.9%) and airline (36.4%). Day trippers were the likeliest segment to arrive by personal vehicle (72.3%), followed by VFRs (48.0%), while hotel guests were the likeliest to arrive by airline (65.0% – an increase from 53.2% in Q3 2021).

Figure 6: Method of Arrival and Departure
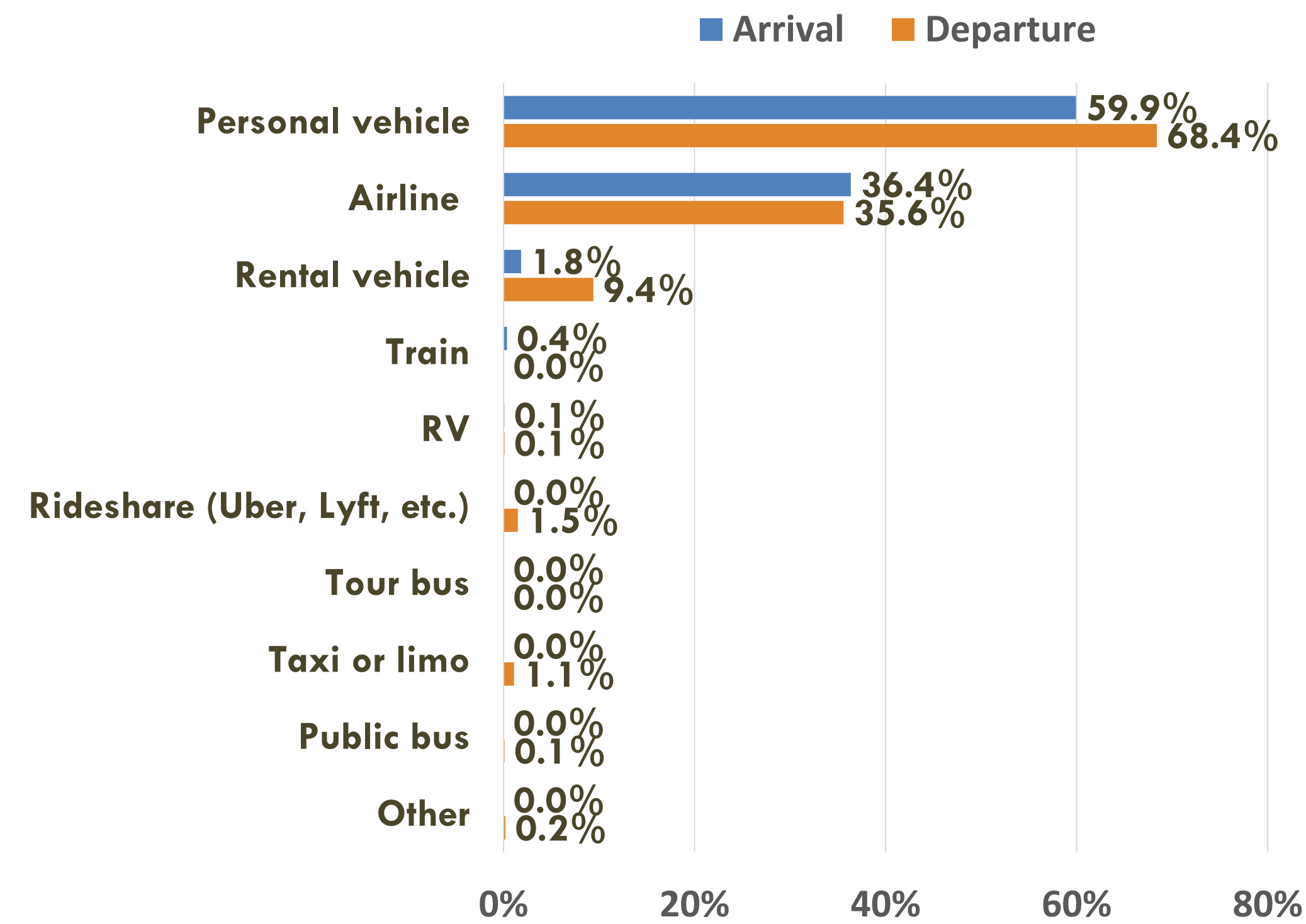
Detail by Traveler Segment

	Hotel		VFR		Day Trip	
	Arrival	**Departure**	**Arrival**	**Departure**	**Arrival**	**Departure**
Personal vehicle	34.0%	38.1%	**48.0%**	70.8%	**72.3%**	81.5%
Airline	**65.0%**	62.6%	52.8%	52.0%	22.5%	22.0%
Rental vehicle	0.9%	16.2%	0.0%	0.7%	2.5%	6.6%
Train	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%
RV	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Rideshare (Uber, Lyft, etc.)	0.2%	7.1%	0.0%	0.0%	0.0%	0.0%
Tour bus	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Taxi or limo	0.0%	4.0%	0.0%	0.0%	0.0%	0.5%
Public bus	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%
Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
Sample Size:	**469**		**121**		**242**	

Question: How did you arrive in the St. Pete/Clearwater area and how will you leave? (Select all that apply) Base: All Respondents. 1,200 responses.

ARRIVAL AIRPORT

Across all segments, air travelers mostly arrived in Pinellas County through Tampa Int'l. (80.7% vs. 54.8% in Q3 2021). 8.9 percent of visitors arriving by airplane flew into St. Pete-Clearwater International (a decrease from 25.7% in Q3 2021), and 5.1 percent flew into Orlando International (a decrease from 14.5% in Q3 2021).

Figure 7: Arrival Airport
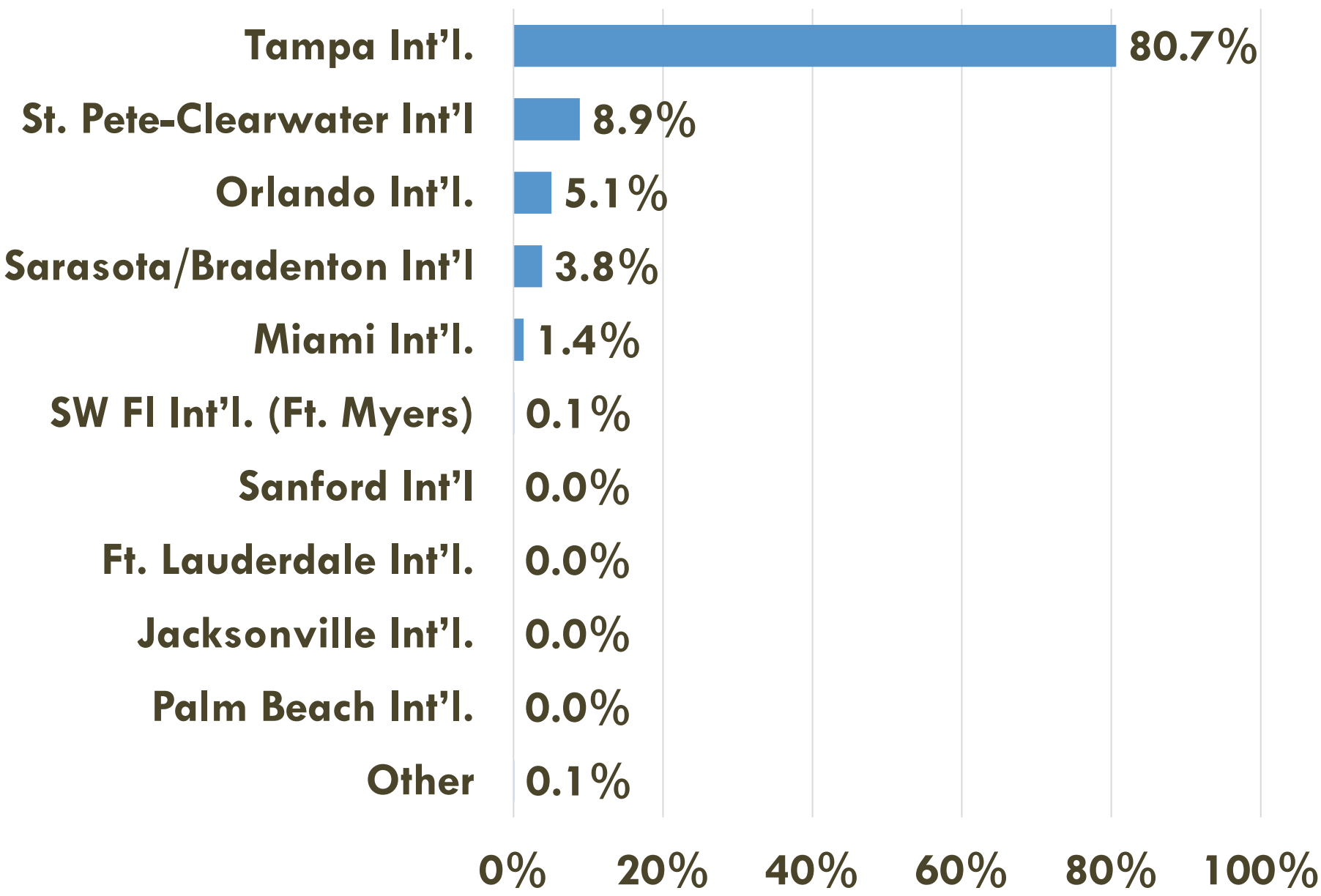
Question: At which airport did you arrive into the area? (Select one) Base: All Respondents who arrived in the area by airplane. 629 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Tampa Int'l.	**82.6%**	**85.6%**	**75.4%**
St. Pete-Clearwater Int'l	9.0%	11.7%	8.2%
Orlando Int'l.	5.9%	1.4%	6.4%
Sarasota/Bradenton Int'l	0.7%	0.0%	8.1%
Miami Int'l.	1.2%	1.4%	2.0%
SW Fl Int'l. (Ft. Myers)	0.3%	0.0%	0.0%
Sanford Int'l	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	0.3%	0.0%	0.0%
Sample Size:	303	67	48

ARRIVAL AIRLINE BY AIRPORT

All Pinellas County visitors who flew into St. Pete-Clearwater International in Q3 2022 arrived via Allegiant Air. Visitors arriving in the destination via Tampa International Airport most commonly flew Southwest Airlines (32.7%), American Airlines (24.9%) and Delta Airlines (19.3%).

Figure 8: Arrival Airline Airport

Tampa Int'l (TIA)

Airline	%
Southwest	32.7%
American Airlines	24.9%
Delta Airlines	19.3%
United	9.4%
Jet Blue	6.1%
Sun Country	0.1%
Alaska Airlines	0.0%
Other	7.3%

St. Pete-Clearwater Int'l (PIE)

	%
	100.0%
	0.0%
	0.0%
	0.0%
	0.0%
	0.0%
	0.0%
	0.0%

Detail by Traveler Segment

	Hotel		VFR		Day Trip	
	TIA	PIE	TIA	PIE	TIA	PIE
Allegiant	0.0%	**100.0%**	0.0%	**100.0%**	0.0%	**100.0%**
Southwest	**24.5%**	0.0%	**31.2%**	0.0%	**33.9%**	0.0%
American Airlines	**26.0%**	0.0%	25.3%	0.0%	29.2%	0.0%
Delta Airlines	**22.0%**	0.0%	26.3%	0.0%	17.0%	0.0%
United	13.6%	0.0%	5.6%	0.0%	**5.8%**	0.0%
Jet Blue	7.6%	0.0%	5.0%	0.0%	5.8%	0.0%
Sun Country	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Alaska Airlines	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	0.0%	0.0%	6.6%	0.0%	8.3%	0.0%
Sample Size:	**278**		**65**		**40**	

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. 583 responses.

TRANSPORTATION USED IN-MARKET

In Q3 2022, personal and rental vehicles continued to be the most utilized forms of transportation within the St. Pete/Clearwater area. 73.4 percent of visitors used their personal vehicle as transportation and 23.3 percent used a rental vehicle to drive around St. Pete/Clearwater. Day trip visitors and VFRs were again the most likely to use a personal vehicle (87.3% and 80.1%, respectively), while hotel guests were the likeliest of all segments to rent a vehicle or take advantage of Free Beach Rides. (1.3%).

Figure 9: Transportation Used In-Market
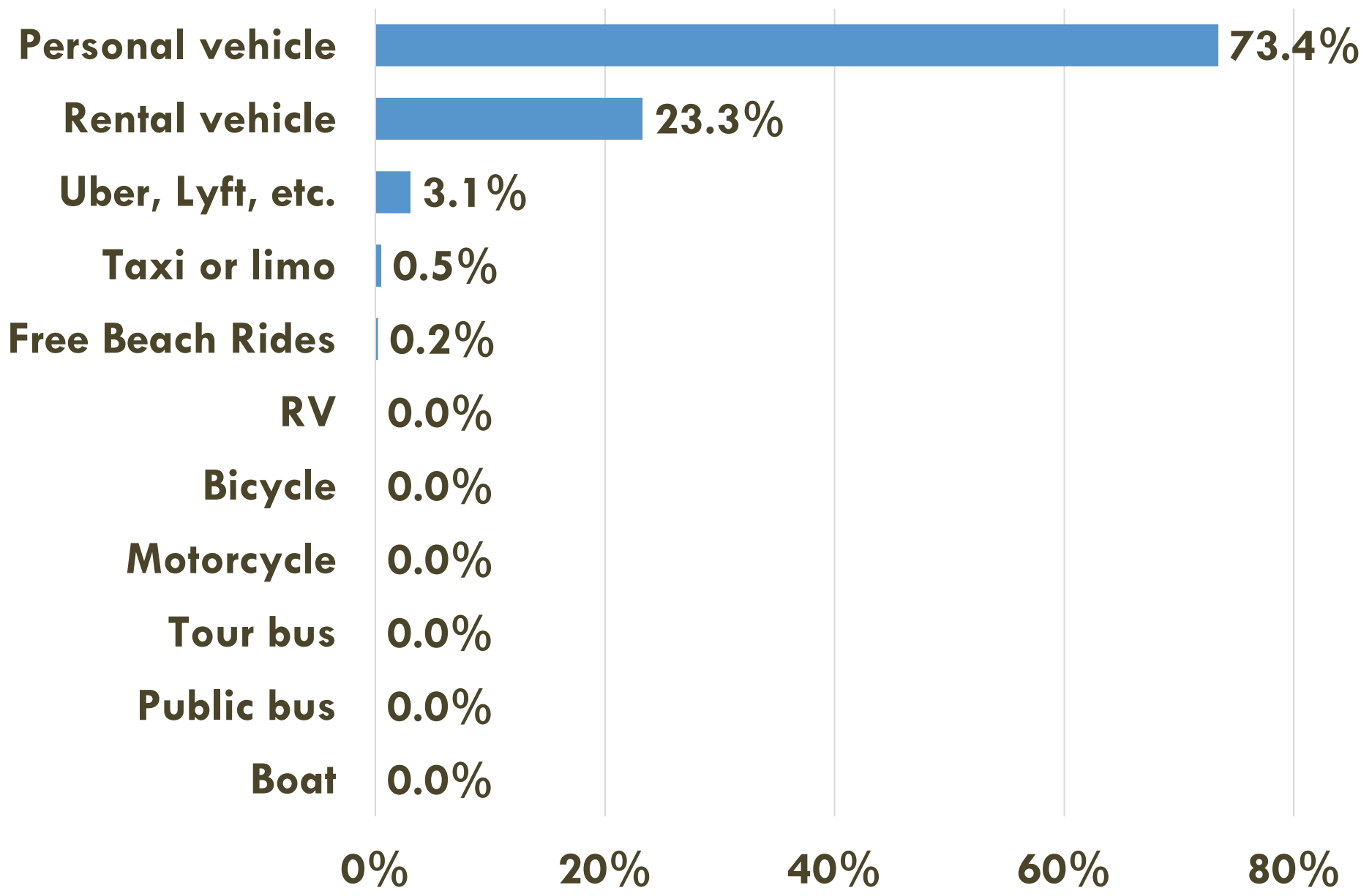
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Personal vehicle	40.0%	**80.1%**	**87.3%**
Rental vehicle	**47.5%**	19.2%	11.6%
Uber, Lyft, etc.	10.8%	1.5%	1.0%
Taxi or limo	2.6%	0.0%	0.0%
Free Beach Rides	**1.3%**	0.0%	0.0%
RV	0.0%	0.0%	0.0%
Bicycle	0.0%	0.0%	0.0%
Motorcycle	0.0%	0.0%	0.0%
Tour bus	0.0%	0.0%	0.0%
Public bus	0.0%	0.0%	0.0%
Boat	0.0%	0.0%	0.0%
Sample Size:	**469**	**121**	**242**

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. 1,200 responses.

RENTAL VEHICLE PICK-UP CITY

Over three-quarters of respondents who rented a vehicle to drive around Pinellas County picked up their vehicle in Tampa. 10.1 percent of St. Pete/Clearwater visitors rented their vehicle in Orlando and 7.5 percent rented their vehicle in Sarasota/Bradenton.

Figure 10: Rental Vehicle Pick-Up City

City	Percentage
Tampa	78.4%
Orlando	10.1%
Sarasota/Bradenton	7.5%
St. Petersburg/ Clearwater area	3.0%
Miami	0.7%
Ft. Myers	0.2%
Outside of Florida	0.1%
Sanford	0.0%
Fort Lauderdale	0.0%
Jacksonville	0.0%
West Palm Beach	0.0%
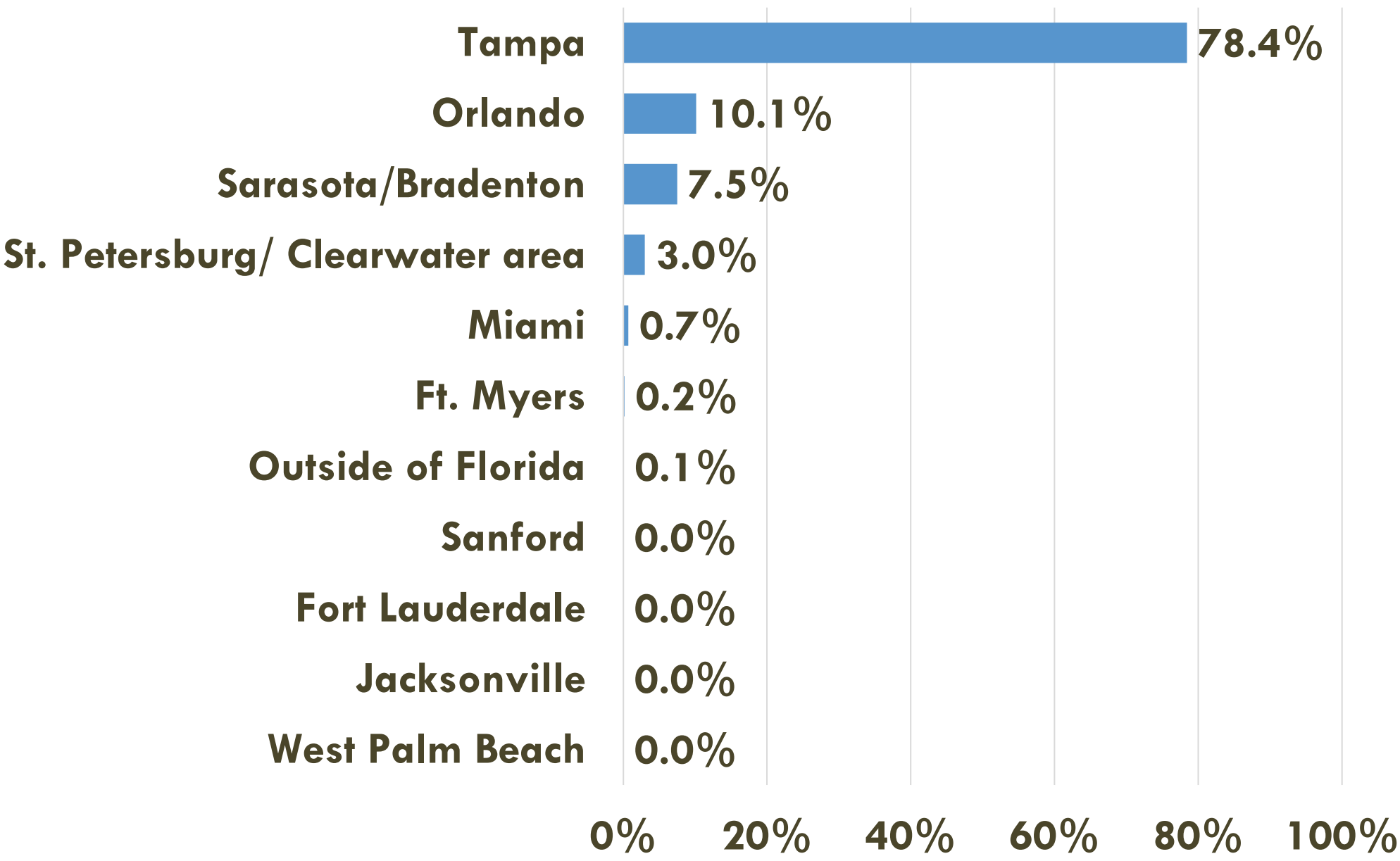
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Tampa	84.7%	96.2%	60.3%
Orlando	9.1%	3.8%	18.1%
Sarasota/Bradenton	0.9%	0.0%	21.6%
St. Petersburg/ Clearwater area	**3.3%**	0.0%	0.0%
Miami	1.6%	0.0%	0.0%
Ft. Myers	0.5%	0.0%	0.0%
Outside of Florida	0.0%	0.0%	0.0%
Sanford	0.0%	0.0%	0.0%
Fort Lauderdale	0.0%	0.0%	0.0%
Jacksonville	0.0%	0.0%	0.0%
West Palm Beach	0.0%	0.0%	0.0%
Sample Size:	**218**	**24**	**23**

Question: In which city did you rent your rental vehicle? (Select one)
Base: Respondents who arrived in the area by rental car. 452 responses.

TRAVEL PARTY SIZE

Typically, travel groups to the St. Pete/Clearwater area were comprised of 2.9 people (similar to 2.7 in Q3 2021), including 01.1 adult males, 1.4 adult females and 0.5 children aged 17 years or younger. In total, 26.0 percent of visitors traveled with children in Q3 2022, similar to 24.6 percent in Q3 2021.

Figure 11: Travel Party Size

	Mean
Male adults (18 yrs. +)	1.1
Female adults (18 yrs. +)	1.4
Male children (0 to 17 yrs.)	0.2
Female children (0 to 17 yrs.)	0.3
Average Travel Party Size	**2.9**
Percent with children in party	**26.0%**
Sample Size:	**1,200**

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Male adults (18 yrs. +)	1.0	1.0	1.1
Female adults (18 yrs. +)	1.2	1.3	1.4
Male children (0 to 17 yrs.)	0.3	0.2	0.2
Female children (0 to 17 yrs.)	0.2	0.2	0.3
Average Travel Party Size	**2.8**	**2.7**	**3.0**
Percent with Children in Party	**25.7%**	**24.2%**	**26.5%**
Sample Size:	**469**	**121**	**242**

Question: How many people of each type are in your immediate travel party, including yourself?
Base: All Respondents. 1,200 responses.

TRAVEL PARTY COMPOSITION

Half of St. Pete/Clearwater visitors traveled to the destination as a couple (50.8% - up from 43.1% in Q3 2021). In addition, 42.6 percent of respondents traveled with immediate family, up from 32.7 percent in Q3 2021, 11.1 percent said they were travelling with a group of friends and 4.9 percent traveled solo. Hotel guests were again most likely to travel as a couple (62.4%), VFRs continue to be the segment likeliest to travel solo to visit friends or family (12.4%), and, as in Q3 2021, day trippers said they visited St. Pete/Clearwater with a group of friends (13.5%).

Figure 12: Travel Party Composition
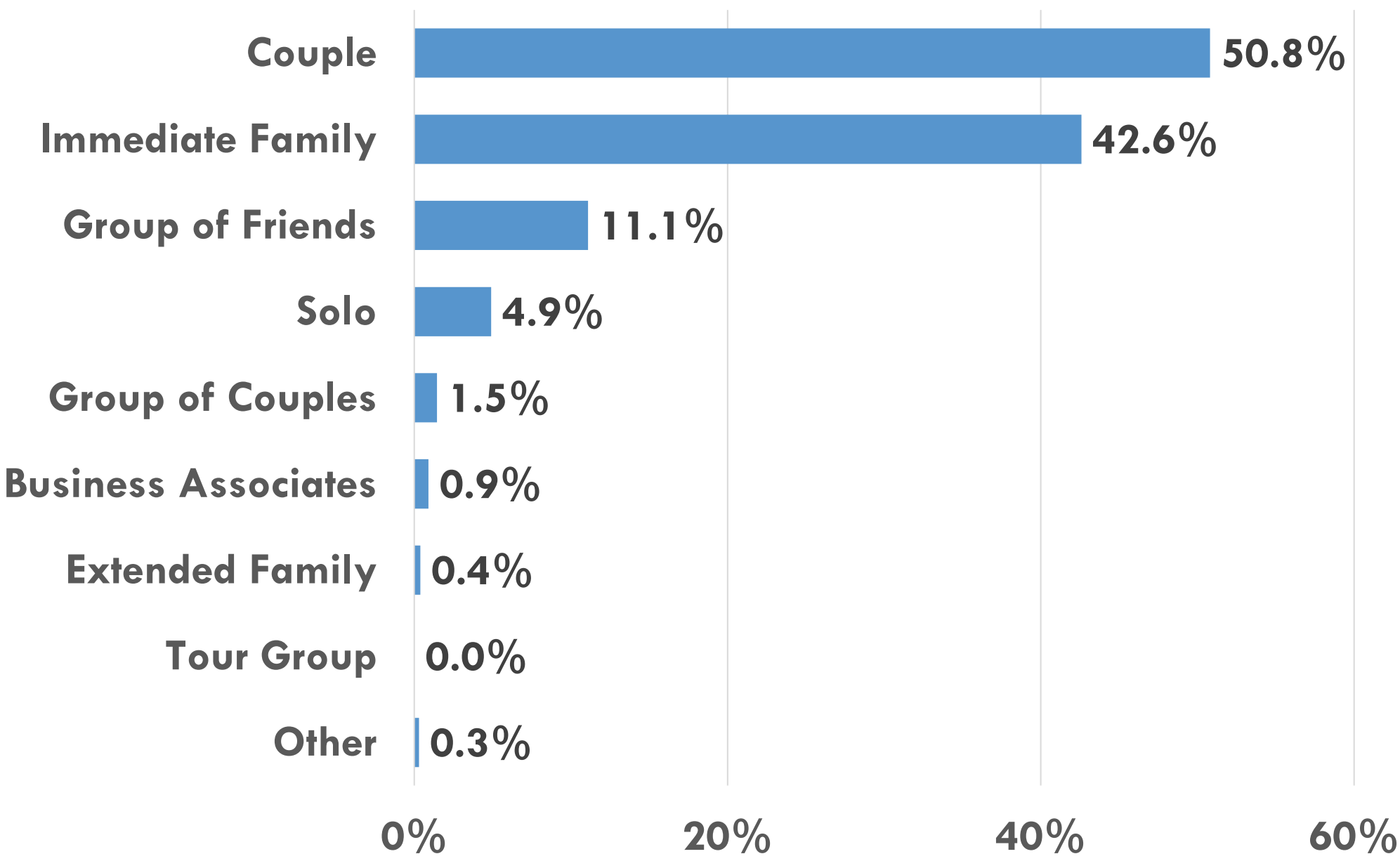
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Couple	**62.4%**	53.6%	43.8%
Immediate Family	32.8%	45.7%	46.4%
Group of Friends	8.6%	4.0%	**13.5%**
Solo	3.7%	**12.4%**	5.0%
Group of Couples	1.4%	0.0%	1.5%
Business Associates	1.4%	0.0%	1.0%
Extended Family	1.4%	1.0%	0.0%
Tour Group	0.0%	0.0%	0.0%
Other	0.2%	0.0%	0.5%
Sample Size:	**469**	**121**	**242**

Question: Which best describes your travel group on this trip? Are you…? (Select all that apply)
Base: All Respondents. 1,200 responses.

LODGING TYPE

Similar to Q3 2021, over one-third of visitors surveyed in Q3 2022 stayed overnight in Pinellas County (36.5%). A proportion of overnight visitors (29.1%) stayed in paid St. Pete/Clearwater accommodations, such as a hotel, resort, motel or inn (17.8%), condo/vacation home rental (8.4%) or a home share rental (2.9%). In addition, 7.3 percent stayed in a private residence of local friends or family.

Day-trippers—including those staying in paid or private accommodations outside the St. Pete/Clearwater area and regional residents on leisure day trips—represented 63.2 percent of visitors surveyed.

Figure 13: Type of Lodging

Hotel, resort, motel or inn in SPC	17.8%
Hotel, resort, motel or inn outside SPC	12.9%
Home share rental in SPC	2.9%
Home share rental outside SPC	3.1%
Condo/vacation home in SPC	8.4%
Condo/vacation home outside SPC	2.6%
Private residence in SPC	7.3%
Private residence outside SPC	16.3%
Campground in SPC	0.1%
RV/Trailer park in SPC	0.0%
Other lodging outside SPC	0.6%
Just passing through	0.3%
Regional resident on a day trip	27.7%

Question: Where are you staying overnight on this trip to the St. Pete/Clearwater area? (Select one) Base: All Respondents. 1,200 responses.

DAYS IN ST. PETE/CLEARWATER

As in Q3 2021, the average visitor who spent less than 30 days in the destination, stayed for 3.0 days in St. Pete/Clearwater. VFRs continued to report the longest length of stay averaging 6.1 days, followed by hotel guests who reported an average of of 5.6 days in the area.

Figure 14: Days in Market

Mean Days
($\leq$ 30) = 3.0

Mean Days
(> 30) = 3.1

Days	Percent
10 or more	3.0%
9	0.5%
8	2.2%
7	13.9%
6	4.9%
5	7.9%
4	5.5%
3	4.9%
2	4.4%
1	52.8%
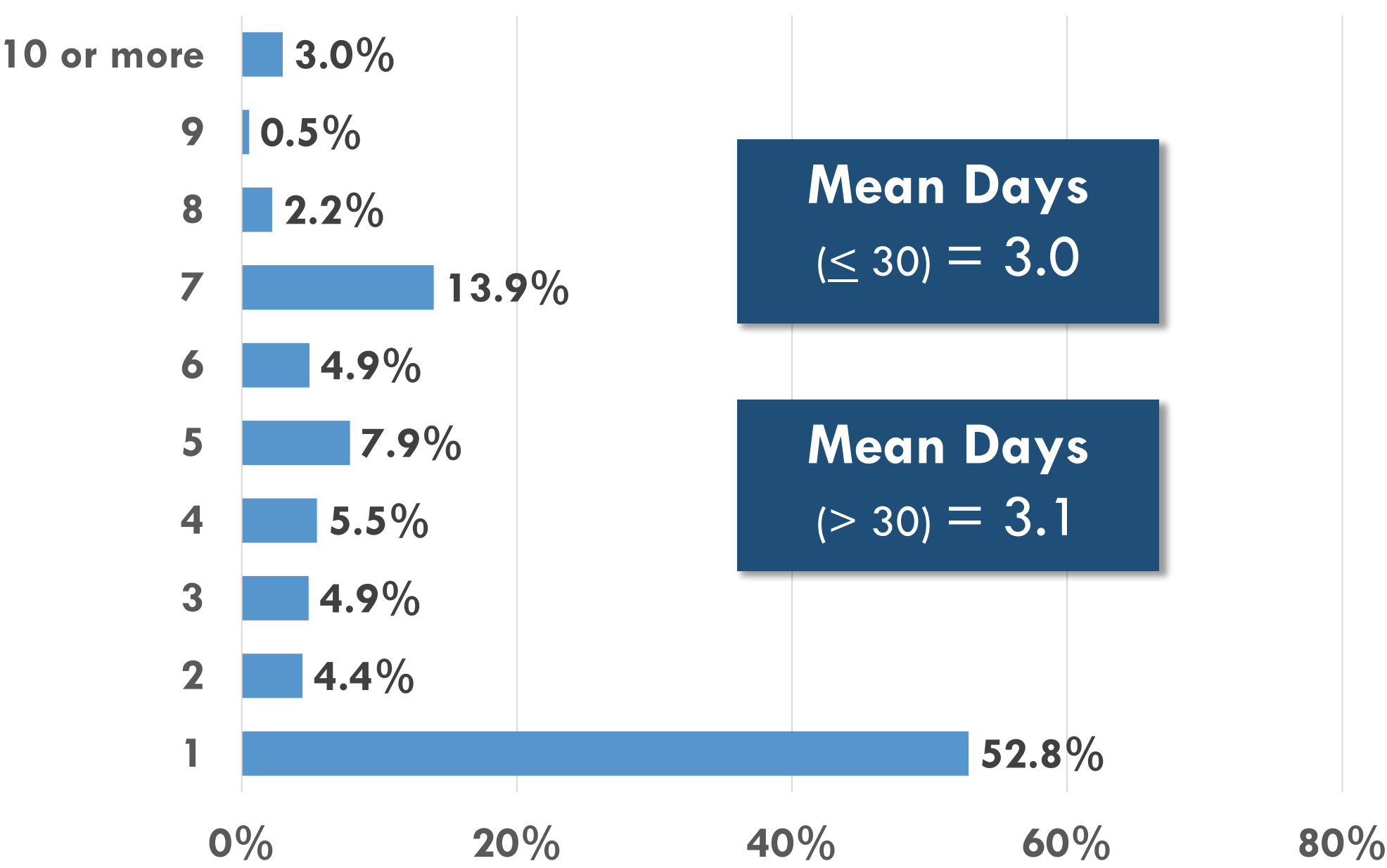
Detail by Traveler Segment

	Hotel	VFR	Day Trip
10 or more	2.6%	10.2%	1.5%
9	0.8%	0.0%	0.5%
8	4.1%	2.2%	0.0%
7	27.7%	35.5%	1.5%
6	12.8%	11.3%	0.5%
5	25.7%	21.4%	0.4%
4	15.7%	11.7%	2.3%
3	8.1%	4.0%	4.2%
2	1.1%	2.8%	6.3%
1	1.3%	0.8%	82.6%
Mean Days (<30)	**5.6**	**6.1**	**1.3**
Mean Days (>30)	**5.6**	**6.5**	**1.3**
Sample Size:	**469**	**121**	**242**

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. 1,200 responses.

NIGHTS IN ST. PETE/CLEARWATER

The typical visitor spent 2.1 nights in St. Pete/Clearwater. 5.4 percent of respondents spent a week or more in the destination. As in the past, VFRs averaged the longest stays, with 13.2 percent staying 7 or more nights in the area.

Figure 15: Nights in Market

	Mean Nights (≤ 30) = 2.1
	Mean Nights (> 30) = 2.1

Detail by Traveler Segment

	Hotel	VFR	Day Trip
10 or more	0.7%	4.0%	--
9	1.9%	6.2%	--
8	0.8%	0.0%	--
7	4.1%	3.0%	--
6	27.4%	34.8%	--
5	13.0%	11.3%	--
4	25.8%	21.4%	--
3	15.4%	11.7%	--
2	8.1%	4.0%	--
1	2.1%	2.8%	--
0	0.5%	0.8%	100%
Mean Nights (<30)	**4.6**	**5.5**	**--**
Mean Nights (>30)	**4.6**	**5.5**	**--**
Sample Size:	**469**	**121**	**242**

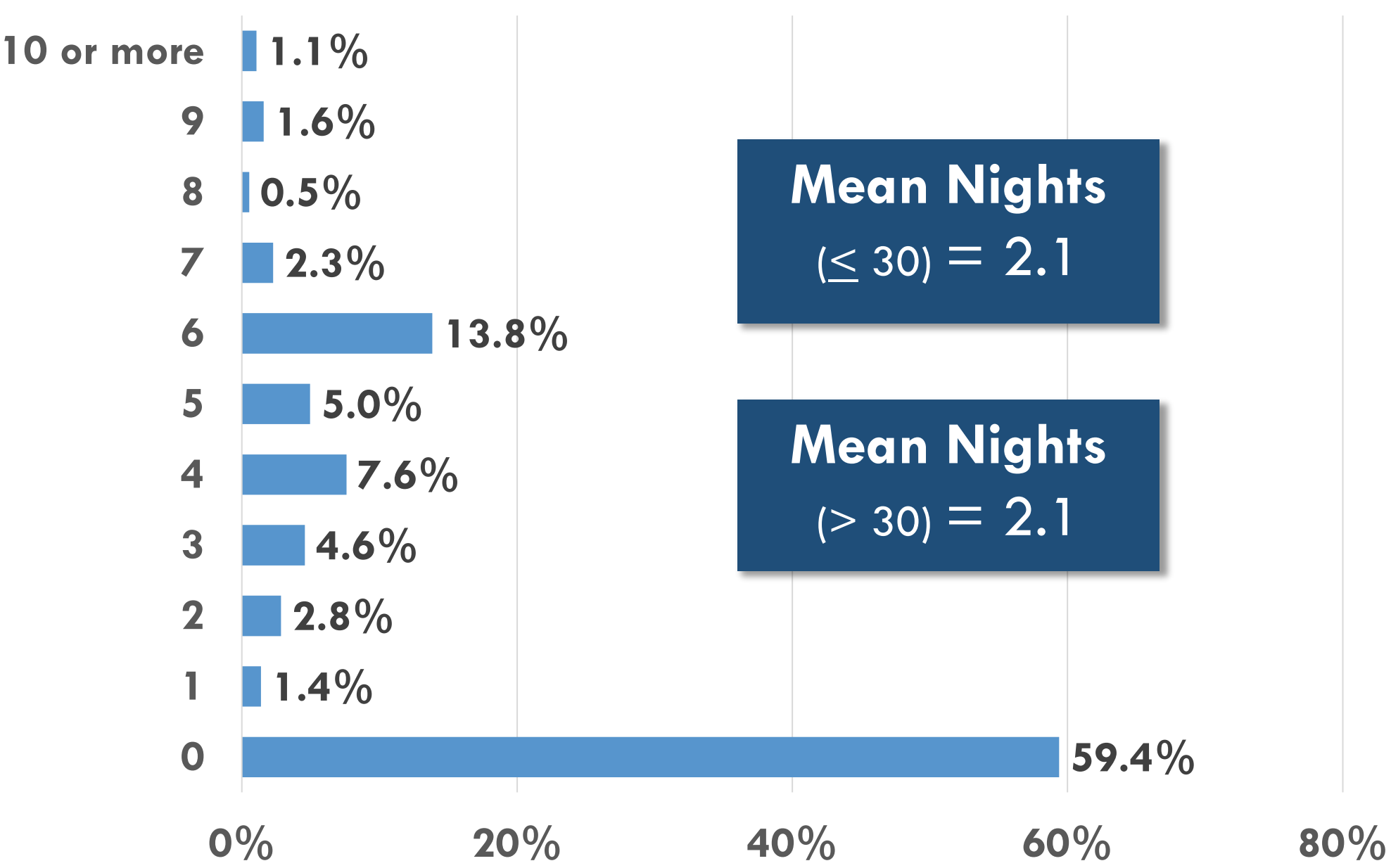Question: How many total days and nights did you, or will you, stay in the St. Pete/Clearwater area on this trip? Base: All Respondents. 1,200 responses.

Destination ◆ Analysts

DAILY SPENDING IN-MARKET

In Q3 2022, St. Pete/Clearwater visitors spent $330.35 per travel party in Pinellas County, up from $280.60 in Q3 2021. It is estimated that the average visitor represented $117.02 per person in daily spending, covering an average of 2.8 travelers. Hotel guests reported the highest spending, averaging $513.08 per travel party and $198.10 per person. This group spent $275.59 per day on St. Pete/Clearwater area lodging accommodations, up from $265.80 in Q3 2021.

Figure 16: Per Day Travel Party Spending

Restaurants	123.99
Hotel/motel/inn/lodging	90.82
Retail store purchases	46.72
Other Entertainment & sightseeing	39.73
Gas, parking and local transportation	23.85
Car rental (in area only)	$0.68
Other	$4.55

Mean Travel Party Spending = $330.35

Avg # of People Covered by Spending = 2.8

Mean Spending per Person = $117.02

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Restaurants	$144.56	$105.45	$110.29
Hotel/motel/inn/lodging	**$275.59**	$17.19	$16.93
Retail store purchases	$38.23	$36.15	$53.55
Other Entertainment & sightseeing	$27.85	$16.88	$48.69
Gas, parking and local transportation	$20.19	$11.25	$27.66
Car rental (in area only)	$1.52	$0.91	$0.22
Other	$5.15	$5.30	$2.45
Mean Spending per Travel Party	**$513.08**	**$193.13**	**$259.79**
# of People Covered by Spending	2.6	2.5	2.9
Mean Spending per Person	**$198.10**	**$78.24**	**$88.89**
Sample Size:	**465**	**115**	**228**

Question: PER DAY, approximately how much will you spend on each of the following while in the St. Pete/Clearwater area? Base: All Respondents. 1,173 responses.

TRIP ACTIVITIES

St. Pete/Clearwater visitors dined in restaurants (87.7%), visited the beach (75.5%) and went swimming (49.4%) during their trip. Presented with a list of 25 activities, visiting respondents selected the activities they participated in. The chart and table below list the top 8 activities selected.

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

Figure 17: Trip Activities
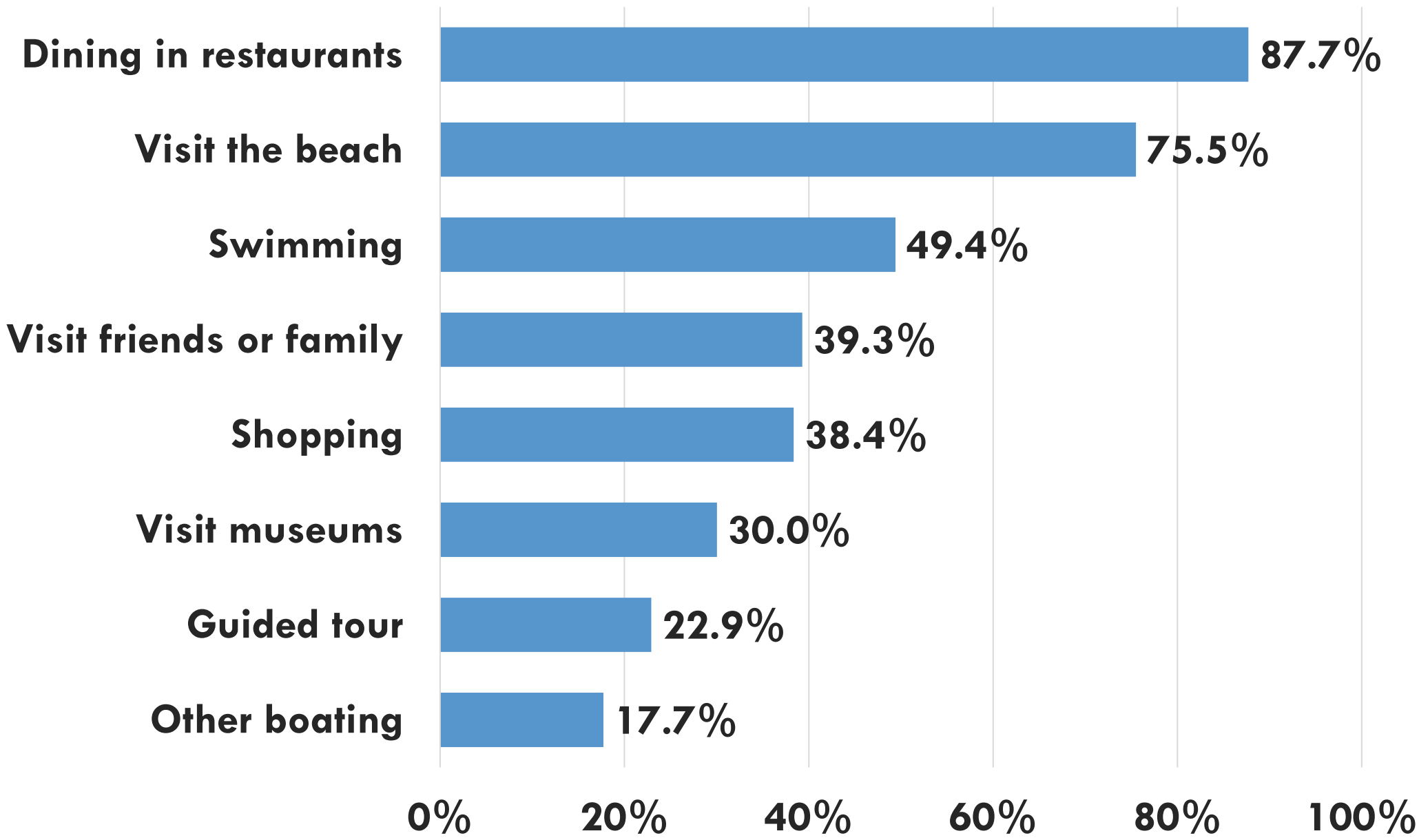
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Dining in restaurants	76.5%	91.1%	89.0%
Visit the beach	90.2%	84.0%	66.4%
Swimming	63.7%	71.6%	36.5%
Visit friends or family	24.4%	67.2%	43.2%
Shopping	31.8%	47.9%	33.5%
Visit museums	23.9%	27.4%	33.2%
Guided tour	27.7%	23.1%	17.1%
Other boating	26.6%	13.6%	14.2%
Sample Size:	**469**	**121**	**242**

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. 1,200 responses.

TRIP ACTIVITIES – FULL DETAIL

	Total	Hotel	VFR	Day Trip
Dining in restaurants	87.7%	76.5%	**91.1%**	**89.0%**
Visit the beach	75.5%	**90.2%**	84.0%	66.4%
Swimming	49.4%	63.7%	**71.6%**	36.5%
Visit friends or family	39.3%	24.4%	67.2%	43.2%
Shopping	38.4%	31.8%	**47.9%**	33.5%
Visit museums	30.0%	23.9%	27.4%	**33.2%**
Guided tour	22.9%	**27.7%**	23.1%	17.1%
Other boating	17.7%	**26.6%**	13.6%	14.2%
Bars/Nightlife	8.8%	**22.1%**	6.7%	5.3%
Attend a festival or special event	6.8%	4.1%	4.5%	**8.7%**
Photography	5.2%	9.2%	4.2%	3.7%
Jet skiing	3.5%	4.7%	3.9%	1.9%
Take a dining cruise	3.4%	**9.7%**	2.2%	1.0%
Bird watching	3.0%	4.9%	3.5%	2.2%
Fishing	2.7%	1.3%	1.5%	2.2%
Shelling	2.3%	5.0%	3.5%	1.0%
Visit breweries and/or distilleries	1.9%	1.1%	1.8%	2.0%
Parasailing	1.7%	3.8%	1.8%	1.2%
Kayaking/Canoeing	1.2%	1.6%	0.0%	1.4%
Golf	0.8%	0.4%	0.7%	0.8%
Attend or participate in a sporting event	0.6%	0.0%	0.0%	0.9%
Biking	0.4%	0.7%	0.7%	0.3%
Paddle boarding	0.4%	0.0%	0.7%	0.5%
Sailing	0.4%	0.5%	0.7%	0.3%
Baseball Spring Training	0.1%	0.2%	0.7%	0.0%
Sample Size:	**1,200**	**469**	**121**	**242**

Differences seen amongst visitor types:

- VFRs and day trippers were likelier than hotel guests to have dined in restaurants in Q3 2022, while hotel guests were the likeliest to have visited a beach (90.2%), gone on a guided tour (27.7%), went boating (26.6%), enjoyed nightlife (22.1%) and went on a dining cruise (9.7%).

- VFRs were the likeliest segment to have gone swimming (71.6%) or shopping (47.9%).

- Day trippers were more inclined than hotel guests or VFRs to visit a museum (33.2%) or attend a special event (8.7%)

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. 1,200 responses.

ATTRACTIONS VISITED

The St. Pete/Clearwater attractions visitors most frequented were the Chihuly Exhibit (18.2%), the St. Pete Pier (16.7%) and the Dali Museum (11.6%). Day trippers were the likeliest segment to have visited the Chihuly Exhibit (21.4%), the St. Pete Pier (19.0%) and the Dali Museum (13.5%), while hotel guests were the likeliest to have gone to the Clearwater Marine Aquarium (7.9%) and Caladesi Island (4.8%).

Figure 18: Attractions Visited

- Chihuly Exhibit — 18.2%
- St. Pete Pier — 16.7%
- Dali Art Museum — 11.6%
- Clearwater Marine Aquarium — 3.8%
- Florida Aquarium in Tampa — 2.2%
- Orlando area Theme Parks — 2.1%
- Sunken Gardens — 1.7%
- Bush Gardens — 1.5%
- Caladesi Island — 1.4%
- Other — 1.7%
- NONE OF THESE — 51.6%
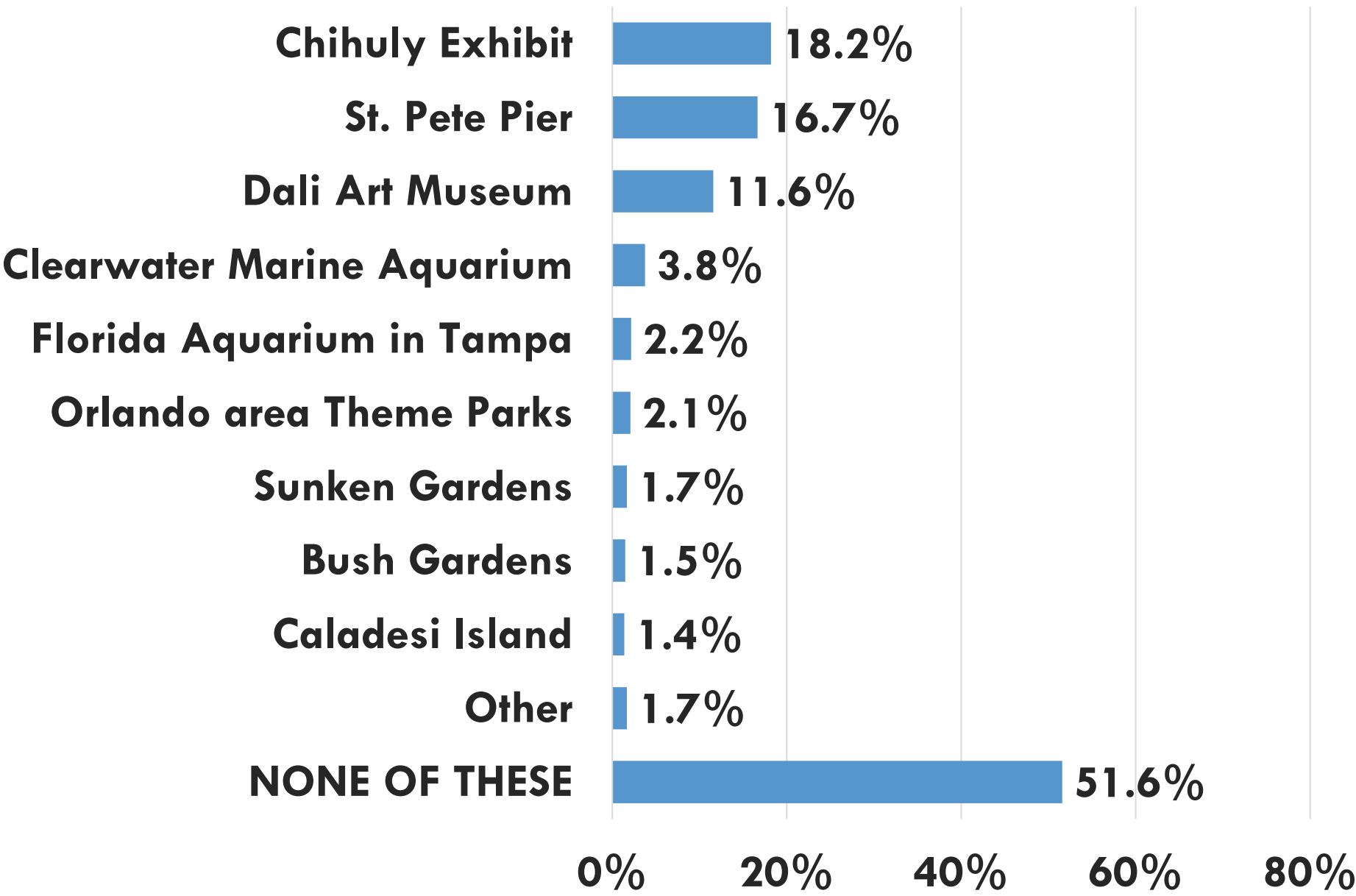
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Chihuly Exhibit	12.6%	16.2%	**21.4%**
St. Pete Pier	8.9%	13.9%	**19.0%**
Dali Art Museum	5.7%	9.9%	**13.5%**
Clearwater Marine Aquarium	**7.9%**	2.5%	2.1%
Florida Aquarium in Tampa	0.2%	0.0%	3.3%
Orlando area Theme Parks	2.9%	0.0%	2.1%
Sunken Gardens	1.9%	4.2%	1.2%
Bush Gardens	0.4%	0.0%	2.2%
Caladesi Island	**4.8%**	0.0%	0.5%
Other	1.7%	0.8%	2.1%
NONE OF THESE	53.2%	60.6%	47.4%
Sample Size:	**49**	**121**	**242**

Question: Which of these attractions did you (or will you) visit while on this trip? (Select all that apply) Base: All Respondents. 1,200 responses.

TOP COMMUNITIES VISITED

The most common communities visitors went to were Madeira Beach (48.0%), St. Petersburg (44.2%), Clearwater Beach (29.3%), Treasure Island (24.1%) and St. Pete Beach (21.1%).

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

Figure 19: Top Communities Visited
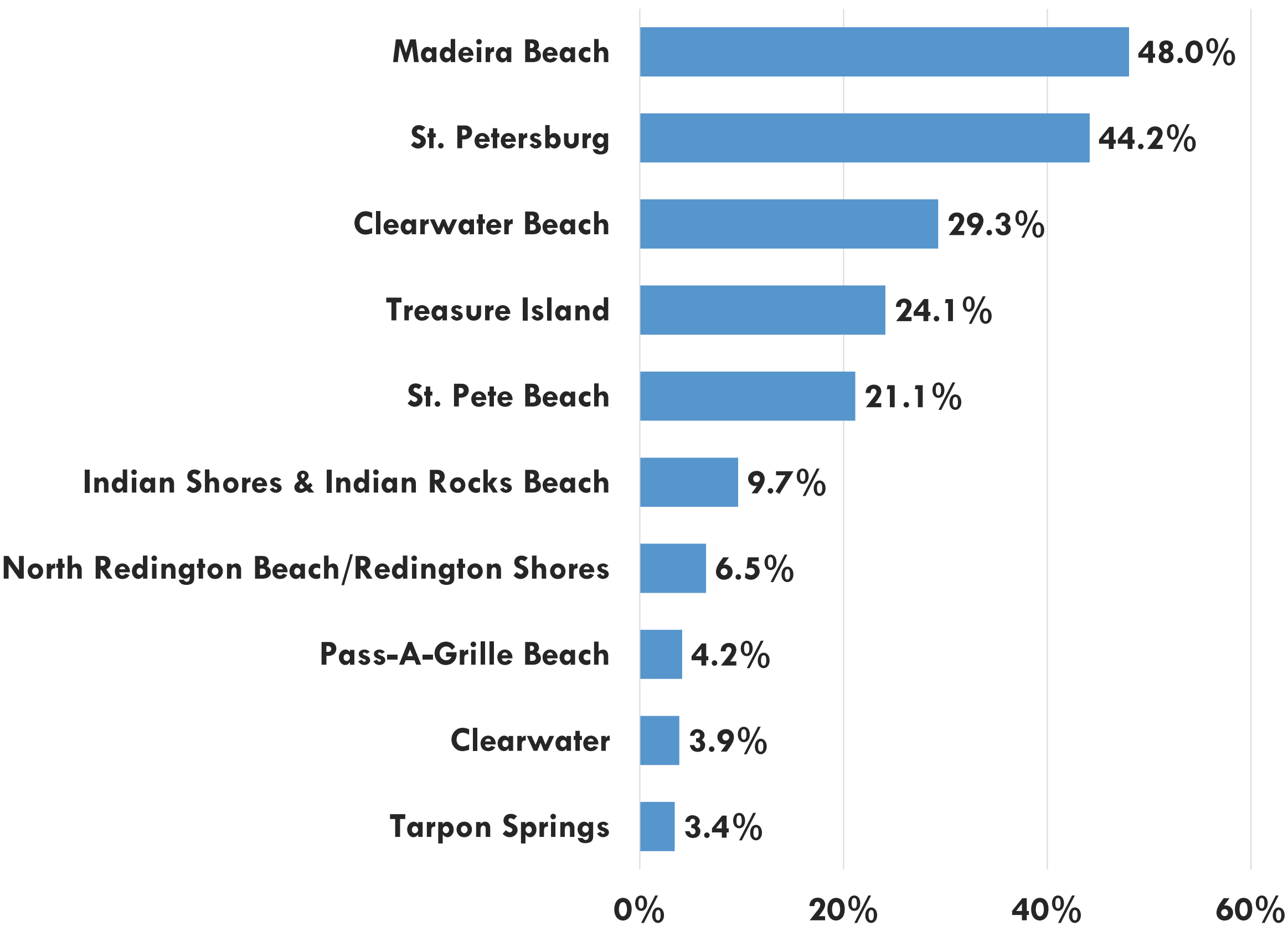
Community	Percentage
Madeira Beach	48.0%
St. Petersburg	44.2%
Clearwater Beach	29.3%
Treasure Island	24.1%
St. Pete Beach	21.1%
Indian Shores & Indian Rocks Beach	9.7%
North Redington Beach/Redington Shores	6.5%
Pass-A-Grille Beach	4.2%
Clearwater	3.9%
Tarpon Springs	3.4%

Question: Which of the following communities in the St. Pete/Clearwater area did you visit? (Show list. Select all that apply) Base: All Respondents. 1,200 responses.

COMMUNITIES VISITED – FULL DETAIL

	Total	Hotel	VFR	Day Trip
Madeira Beach	48.0%	39.9%	**66.4%**	**42.2%**
St. Petersburg	44.2%	30.5%	**58.5%**	**46.3%**
Clearwater Beach	29.3%	**44.1%**	37.1%	**21.5%**
Treasure Island	24.1%	23.4%	**42.4%**	16.5%
St. Pete Beach	21.1%	28.6%	**39.8%**	13.7%
Indian Shores & Indian Rocks Beach	9.7%	4.5%	**24.1%**	3.2%
North Redington Beach/Redington Shores	6.5%	5.8%	**13.8%**	1.9%
Pass-A-Grille Beach	4.2%	3.4%	3.3%	3.8%
Clearwater	3.9%	3.1%	6.2%	3.7%
Tarpon Springs	3.4%	1.1%	**11.5%**	2.2%
Dunedin	3.0%	0.4%	8.8%	2.5%
Seminole	1.7%	0.6%	6.7%	0.5%
Largo	1.6%	0.3%	8.7%	1.0%
Gulfport	1.5%	0.5%	7.1%	0.8%
Tierra Verde	0.8%	0.4%	0.0%	0.6%
Pinellas Park	0.7%	0.2%	0.0%	0.9%
Palm Harbor	0.6%	0.0%	0.8%	0.6%
Safety Harbor	0.6%	0.2%	1.0%	0.3%
Oldsmar	0.5%	0.0%	0.0%	0.8%
Sample Size:	**1,200**	**469**	**121**	**242**

Interesting differences seen amongst visitor types:

- Hotel guests were again the most likely segment to have visited Clearwater Beach during their trip to the St. Pete/Clearwater area (44.1%).

- VFRs continued to be the likeliest segment to have visited most of the Pinellas County communities.

- In addition to downtown St. Petersburg (46.3%), day trippers spent time in Madeira Beach (42.2%) and Clearwater Beach (21.5%).

Question: Which of the following communities in the St. Pete/Clearwater area did you visit? (Show list. Select all that apply)
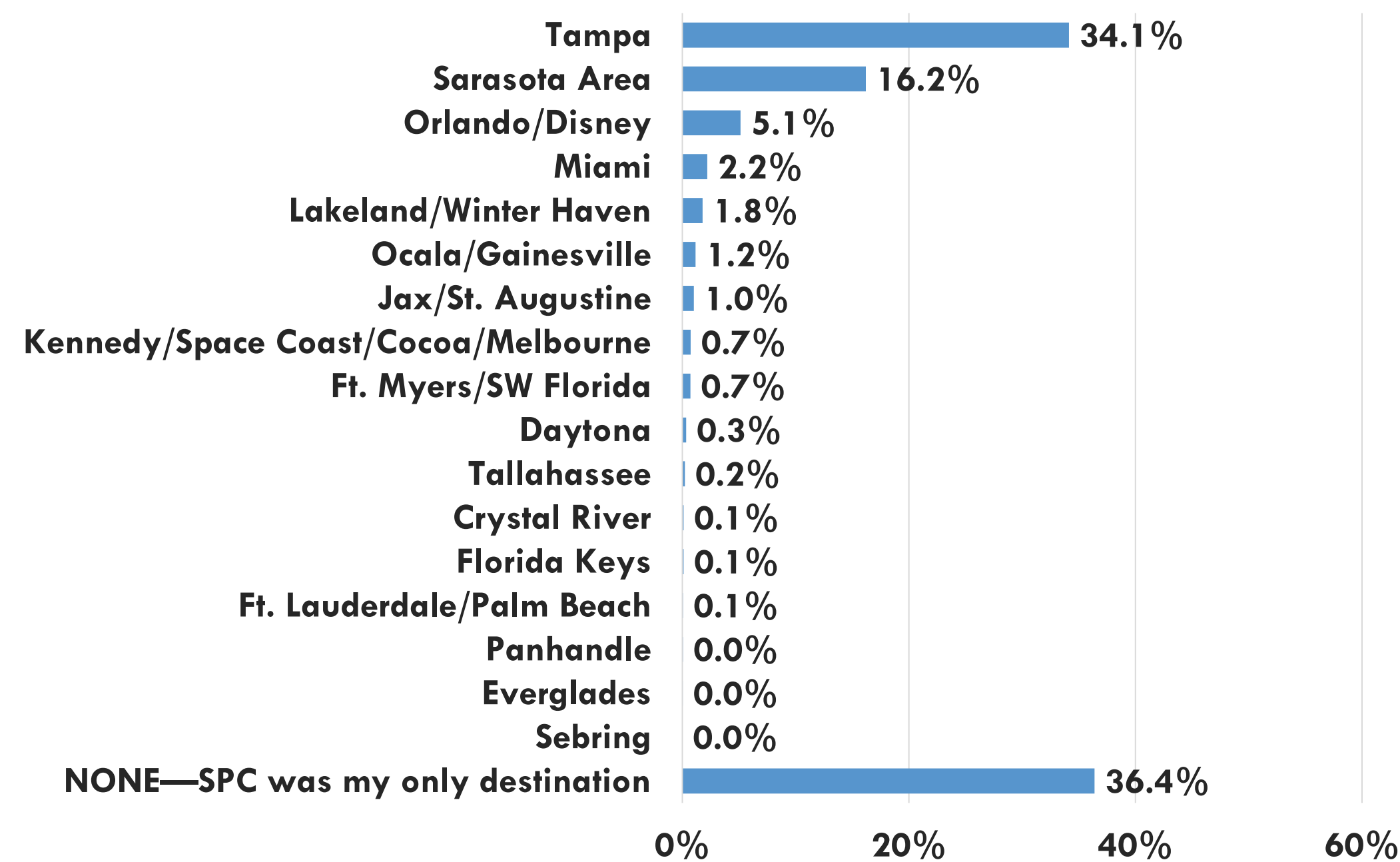
Base: All Respondents. 1, 200 responses.

OTHER DESTINATIONS VISITED

St. Pete/Clearwater was the only destination for 36.4 percent of visitors in Q3 2022, down from 48.1 percent in Q3 2021. Respondents were likeliest to have visited Tampa (34.1%), the Sarasota area (16.2%) and Orlando/Disney (5.1%).

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

Destination	Percentage
Tampa	34.1%
Sarasota Area	16.2%
Orlando/Disney	5.1%
Miami	2.2%
Lakeland/Winter Haven	1.8%
Ocala/Gainesville	1.2%
Jax/St. Augustine	1.0%
Kennedy/Space Coast/Cocoa/Melbourne	0.7%
Ft. Myers/SW Florida	0.7%
Daytona	0.3%
Tallahassee	0.2%
Crystal River	0.1%
Florida Keys	0.1%
Ft. Lauderdale/Palm Beach	0.1%
Panhandle	0.0%
Everglades	0.0%
Sebring	0.0%
NONE—SPC was my only destination	36.4%

Question: Which of these other destinations did you visit while on this trip? (Select all that apply) Base: All Respondents. 1,200 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Tampa	14.3%	27.2%	39.8%
Sarasota Area	4.4%	5.3%	21.5%
Orlando/Disney	5.5%	3.5%	5.4%
Miami	1.4%	0.7%	2.8%
Lakeland/Winter Haven	1.5%	0.0%	2.3%
Ocala/Gainesville	0.4%	0.0%	1.7%
Jax/St. Augustine	1.4%	0.8%	0.8%
Kennedy/Space Coast/Cocoa/Melbourne	1.1%	0.8%	0.4%
Ft. Myers/SW Florida	1.7%	0.0%	0.0%
Daytona	0.0%	0.0%	0.5%
Tallahassee	0.0%	0.0%	0.3%
Crystal River	0.4%	0.0%	0.0%
Florida Keys	0.2%	0.7%	0.0%
Ft. Lauderdale/Palm Beach	0.2%	0.0%	0.0%
Panhandle	0.3%	0.0%	0.0%
Everglades	0.0%	0.0%	0.0%
Sebring	0.0%	0.0%	0.0%
NONE—SPC was my only destination	59.0%	57.7%	25.9%
Sample Size:	**469**	**121**	**242**

FIRST-TIME VISIT TO FLORIDA

Only 3.1 percent of responding St. Pete/Clearwater visitors were in the State of Florida for the first time. As in Q3 2021, most visitors had been in Florida on a previous trip (96.9%).

Hotel guests were the likeliest segment to be on a first-time trip to Florida (4.6%).

Figure 21: First-Time Visitors to Florida

Yes, 3.1%

No, 96.9%
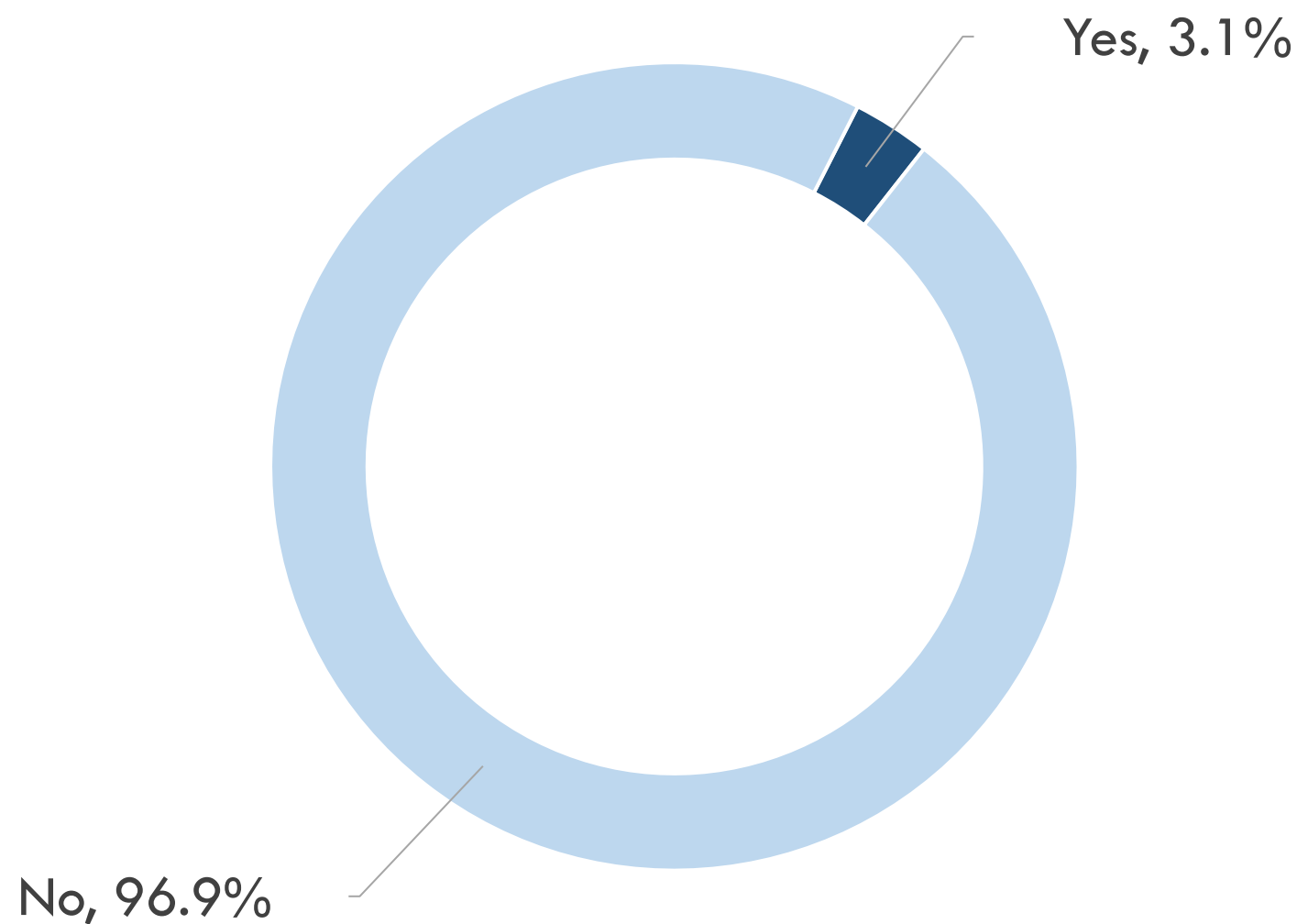
Detail by Traveler Segment

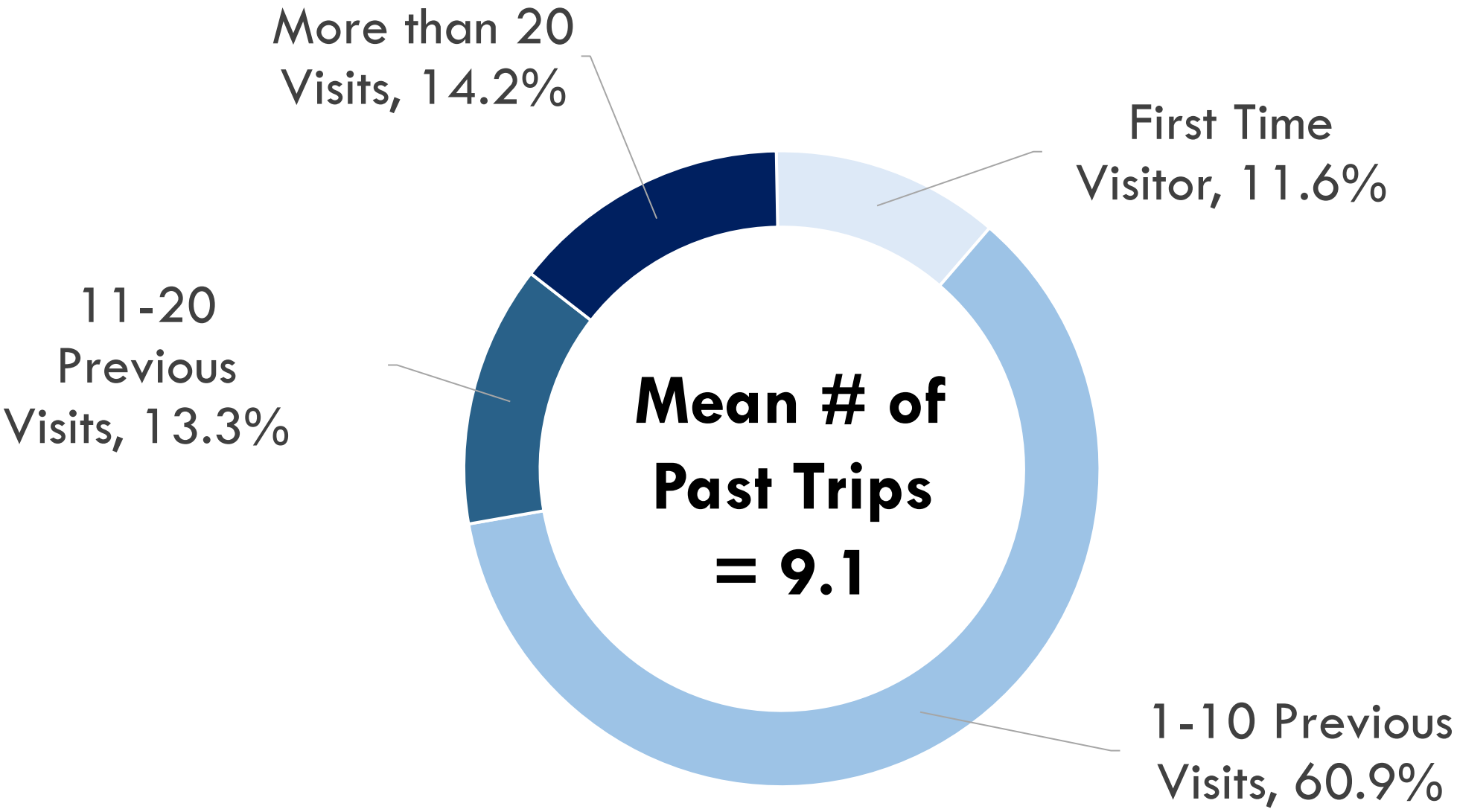|	Hotel	VFR	Day Trip
Yes	4.6%	3.2%	2.8%
No	95.4%	96.8%	97.2%
Sample Size:	**465**	**121**	**240**

Question: Is this your first visit to Florida? Base: All Respondents 1,193 responses.

PREVIOUS VISITATION TO ST. PETE/CLEARWATER

Approximately one-in-ten visitors were in the St. Pete/Clearwater area for the first time (11.6% vs. 29.2% in Q3 2021). The average Pinellas County visitor surveyed had taken 9.1 previous trips to the destination. Amongst the visitor segments, 15.7 percent of hotel guests reported being first-time visitors – a decrease from 35.1 percent in Q3 2021.

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

More than 20 Visits, 14.2%

First Time Visitor, 11.6%

11-20 Previous Visits, 13.3%

Mean # of Past Trips = 9.1

1-10 Previous Visits, 60.9%

Detail by Traveler Segment

	Hotel	VFR	Day Trip
First-time Visitors	15.7%	8.4%	10.6%
1-10 Previous Visits	70.7%	77.6%	52.8%
11-20 Previous Visits	8.1%	7.0%	17.1%
More than 20 Previous Visits	5.4%	7.0%	19.6%
Mean	**6.0**	**6.6**	**11.0**
Sample Size:	**462**	**121**	**234**

Question: Prior to this visit, how many times have you been to the St. Pete/Clearwater area?
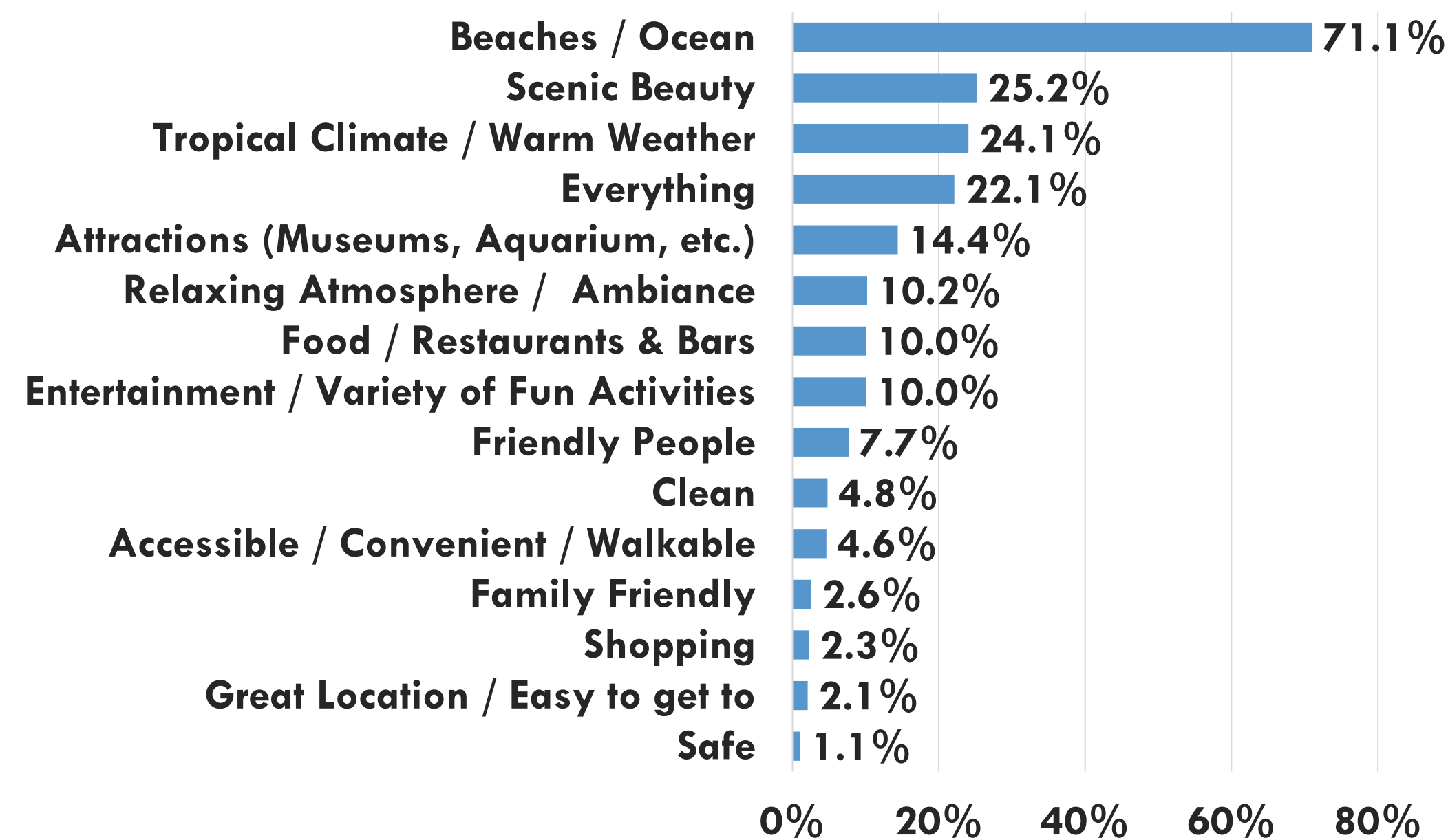Base: All Respondents. 1,176 responses.

Visitor Satisfaction

MOST LIKED ASPECTS OF ST. PETE/CLEARWATER

Not surprisingly, St. Pete/Clearwater beaches remained the most liked aspect of the area (71.1%), followed by scenic beauty (25.2%), tropical climate (24.1%) and "everything" (22.1%). Hotel guests were the likeliest segment to like the beaches (86.4%) and the tropical climate (42.4%) while VFRs were the likeliest to say "everything" (27.1%). Day trip visitors were likelier to cite area attractions as a most liked aspect of the destination (17.0%).

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

Beaches / Ocean — 71.1%
Scenic Beauty — 25.2%
Tropical Climate / Warm Weather — 24.1%
Everything — 22.1%
Attractions (Museums, Aquarium, etc.) — 14.4%
Relaxing Atmosphere / Ambiance — 10.2%
Food / Restaurants & Bars — 10.0%
Entertainment / Variety of Fun Activities — 10.0%
Friendly People — 7.7%
Clean — 4.8%
Accessible / Convenient / Walkable — 4.6%
Family Friendly — 2.6%
Shopping — 2.3%
Great Location / Easy to get to — 2.1%
Safe — 1.1%

Question: What do you like most about the St. Pete/Clearwater area?
Base: All Respondents. 1,200 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Beaches / Ocean	**86.4%**	61.3%	68.8%
Scenic Beauty	25.9%	18.8%	25.1%
Tropical Climate / Warm Weather	**42.4%**	20.6%	18.1%
Everything	9.7%	**27.1%**	23.2%
Attractions (Museums, Aquarium, etc.)	8.9%	12.3%	**17.0%**
Relaxing Atmosphere / Ambiance	8.9%	8.7%	11.1%
Food / Restaurants & Bars	8.1%	6.1%	11.4%
Entertainment / Variety of Fun Activities	9.3%	4.8%	10.6%
Friendly People	7.0%	8.7%	8.2%
Clean	4.9%	3.2%	5.1%
Accessible / Convenient / Walkable	6.3%	4.0%	4.6%
Family Friendly	3.4%	0.8%	2.8%
Shopping	1.7%	0.0%	2.6%
Great Location / Easy to get to	0.8%	4.3%	2.0%
Safe	0.5%	0.0%	1.4%
Sample Size:	**469**	**121**	**242**

ATTRACTIONS OR SERVICES THAT WOULD ENHANCE THE DESTINATION EXPERIENCE

A majority of visitors reported that the destination needs no improvement when asked what would enhance their overall experience in the St. Pete/Clearwater area (79.8%). Of the specific suggestions provided by visitors, the most common were cheaper & more parking (13.1% -- up from 9.3% in Q3 2021) and less congestion/traffic (5.4% -- up from 3.2% in Q3 2021). Day trip visitors were the likeliest to suggest cheaper & more parking (16.9%) and less congestion/traffic (6.9%).

Figure 24: Additional Attractions or Services (Unaided)

It needs no improvement	79.8%
Cheaper & More Parking	13.1%
Less congestion / traffic	5.4%
More Public Transportation Options	3.7%
Restaurant Diversity	1.0%
More public restrooms	0.9%
More shaded / green areas	0.7%
More Affordable	0.6%
More Activities / Attractions	0.6%
More Shopping	0.4%

Detail by Traveler Segment

	Hotel	VFR	Day Trip
It needs no improvement	85.0%	90.6%	75.7%
Cheaper & More Parking	5.0%	5.7%	**16.9%**
Less congestion / traffic	2.1%	5.4%	**6.9%**
More Public Transportation Options	4.5%	1.8%	4.1%
Restaurant Diversity	1.2%	0.0%	1.1%
More public restrooms	0.3%	1.0%	1.2%
More shaded / green areas	0.0%	0.0%	1.1%
More Affordable	1.5%	1.5%	0.3%
More Activities / Attractions	0.0%	0.0%	0.9%
More Shopping	0.0%	0.0%	0.4%
Sample Size:	**469**	**121**	**242**

Question: In your opinion, what services or additional attractions would most enhance your experience in the St. Pete/Clearwater Area? Base: All Respondents. 1,200 responses.

FEELINGS IN ST. PETE/CLEARWATER
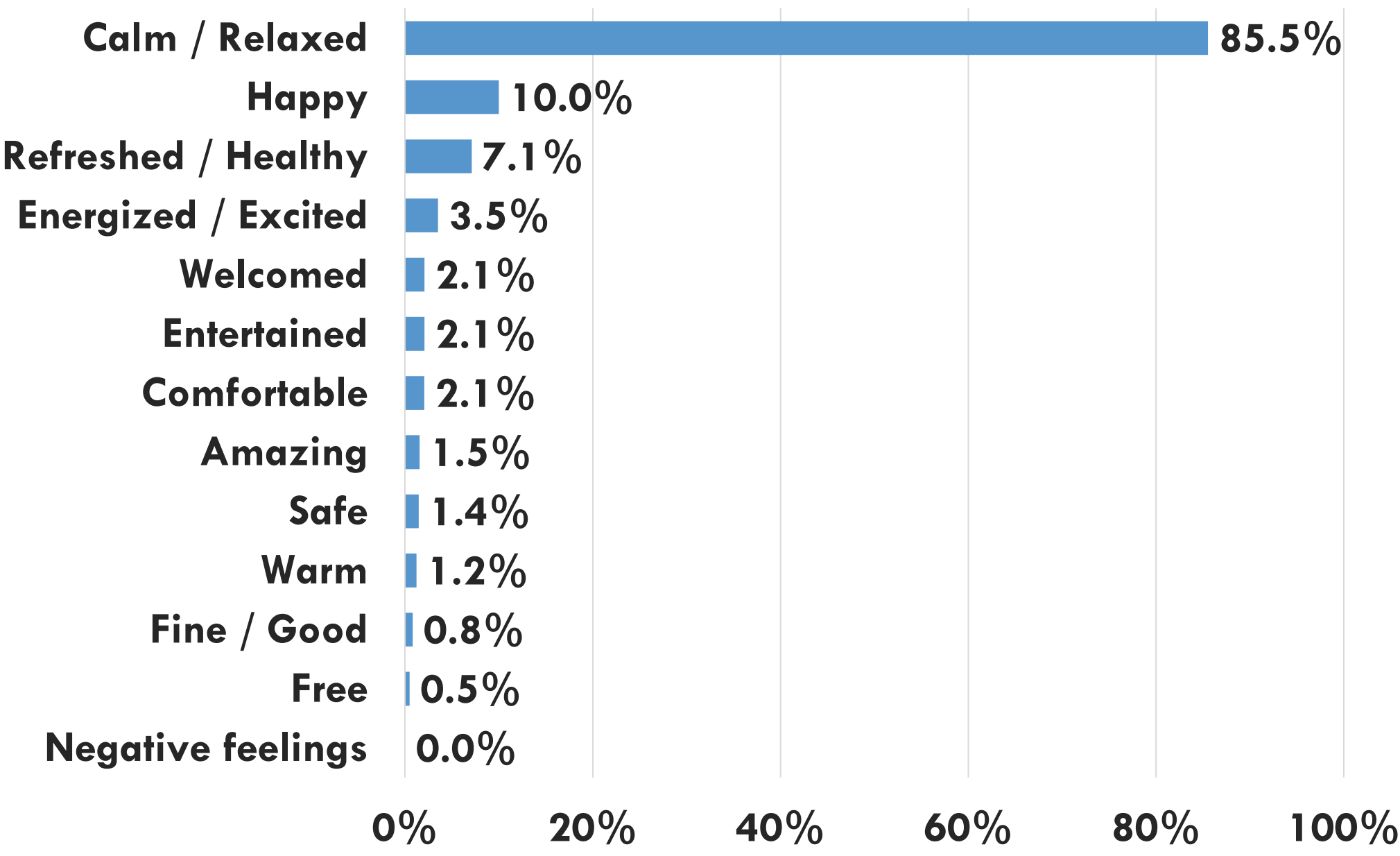
For St. Pete/Clearwater visitors, the area commonly conjured feelings of calmness/relaxation (85.5% - up from 45.5% in Q3 2021) and happiness (10.0% vs. 25.8% in Q3 2021). Nearly equal amounts of hotel guests, VFRs and day trip visitors stated they felt calm and relaxed while in the destination (89.2%, 85.3% and 84.4%, respectively), with hotel guests also being the most likely segment to state that they felt refreshed/healthy (14.7%) and energized/excited (6.8%).

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

Feeling	Percentage
Calm / Relaxed	85.5%
Happy	10.0%
Refreshed / Healthy	7.1%
Energized / Excited	3.5%
Welcomed	2.1%
Entertained	2.1%
Comfortable	2.1%
Amazing	1.5%
Safe	1.4%
Warm	1.2%
Fine / Good	0.8%
Free	0.5%
Negative feelings	0.0%

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Calm / Relaxed	**89.2%**	**85.3%**	**84.4%**
Happy	7.3%	10.0%	10.7%
Refreshed / Healthy	**14.7%**	7.2%	6.0%
Energized / Excited	**6.8%**	0.7%	3.3%
Welcomed	0.2%	0.0%	3.2%
Entertained	1.1%	1.0%	2.8%
Comfortable	1.6%	0.0%	2.6%
Amazing	1.2%	2.3%	1.4%
Safe	0.7%	0.7%	2.0%
Warm	0.9%	0.0%	1.7%
Fine / Good	1.0%	0.0%	0.9%
Free	0.5%	1.5%	0.3%
Negative feelings	0.0%	0.0%	0.0%
Sample Size:	**469**	**121**	**242**

Question: What one word or phrase best describes how you feel in the St. Pete/Clearwater area? Base: All Respondents. 1,200 responses.

OVERALL SATISFACTION

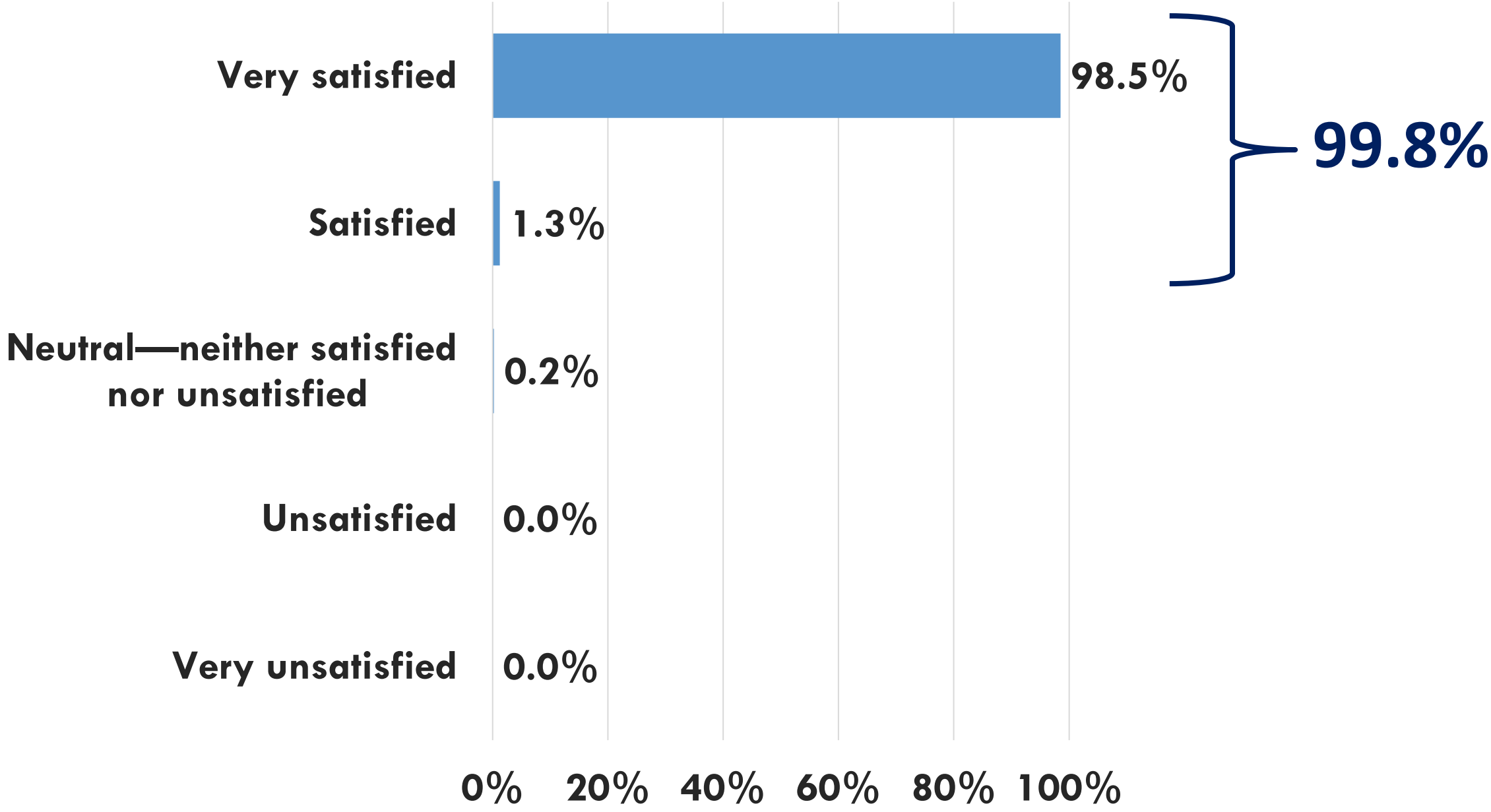**St. Pete/Clearwater continues to deliver a high visitor satisfaction rating (99.8%).** Nearly all respondents said they were either "very satisfied" (98.5%) or "satisfied" (1.3%) with their experience in St. Pete/Clearwater.

Figure 26: Overall Satisfaction

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Very satisfied	98.4%	97.5%	98.7%
Satisfied	1.3%	2.5%	1.0%
Neutral—neither satisfied nor unsatisfied	0.3%	0.0%	0.3%
Unsatisfied	0.0%	0.0%	0.0%
Very unsatisfied	0.0%	0.0%	0.0%
Sample Size:	**468**	**121**	**241**

Question: How satisfied are you with your experience in the St. Pete/Clearwater area on this trip? (Select one) Base: All Respondents. 1,196 responses.

LIKELIHOOD TO RECOMMEND

In line with the high level of satisfaction, St. Pete/Clearwater visitors are likely to recommend the area as a travel destination to others. Visitors rated their likelihood to recommend the destination a 9.9 out of 10 (similar to 9.8 out of 10 in Q3 2021).

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

9.9/10

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. 1,199 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
10—Certain to Recommend	94.0%	96.7%	94.5%
9	4.6%	2.5%	4.0%
8	1.2%	0.7%	1.5%
7	0.0%	0.0%	0.0%
6	0.0%	0.0%	0.0%
5	0.3%	0.0%	0.0%
4	0.0%	0.0%	0.0%
3	0.0%	0.0%	0.0%
2	0.0%	0.0%	0.0%
1—Definitely WILL NOT Recommend	0.0%	0.0%	0.0%
Mean Score	**9.9**	**10.0**	**9.9**
Sample Size:	**469**	**121**	**241**

LIKELIHOOD TO RETURN

These highly satisfied visitors also reported an equally high likelihood to return to St. Pete/Clearwater in the future. Consistent with their visitor satisfaction and likelihood to recommend the destination, the average visitor rated their likelihood to return a 9.9 out of 10 – up from 9.6 out of 10 in Q3 2021.

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

9.9/10

Detail by Traveler Segment

	Hotel	VFR	Day Trip
10—Certain to Return	85.6%	95.0%	90.8%
9	9.7%	3.2%	7.4%
8	3.7%	1.7%	1.7%
7	0.7%	0.0%	0.0%
6	0.0%	0.0%	0.0%
5	0.3%	0.0%	0.0%
4	0.0%	0.0%	0.0%
3	0.0%	0.0%	0.0%
2	0.0%	0.0%	0.0%
1—Definitely WILL NOT Return	0.0%	0.0%	0.0%
Mean Score	**9.8**	**9.9**	**9.9**
Sample Size:	**469**	**121**	**240**

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. 1,198 responses.

Q3 2022
Point of Origin &
Demographic Profile

POINT OF ORIGIN: COUNTRY

In Q3 2022, the St. Pete/Clearwater area saw a slight increase in international visitors (2.8% vs. 1.3% in Q3 2021). These international visitors were from Canada (1.0%), the United Kingdom (0.9%), and Germany (0.6%). 97.2 percent of visitors surveyed were domestic.

Figure 29: Country of Origin

Detail by Traveler Segment

	Hotel	VFR	Day Trip
United States	96.4%	97.8%	97.7%
Canada	0.9%	0.7%	0.5%
United Kingdom	1.4%	0.8%	0.5%
Germany	0.0%	0.0%	0.4%
Other	1.2%	0.7%	0.8%
Sample Size:	**452**	**119**	**239**
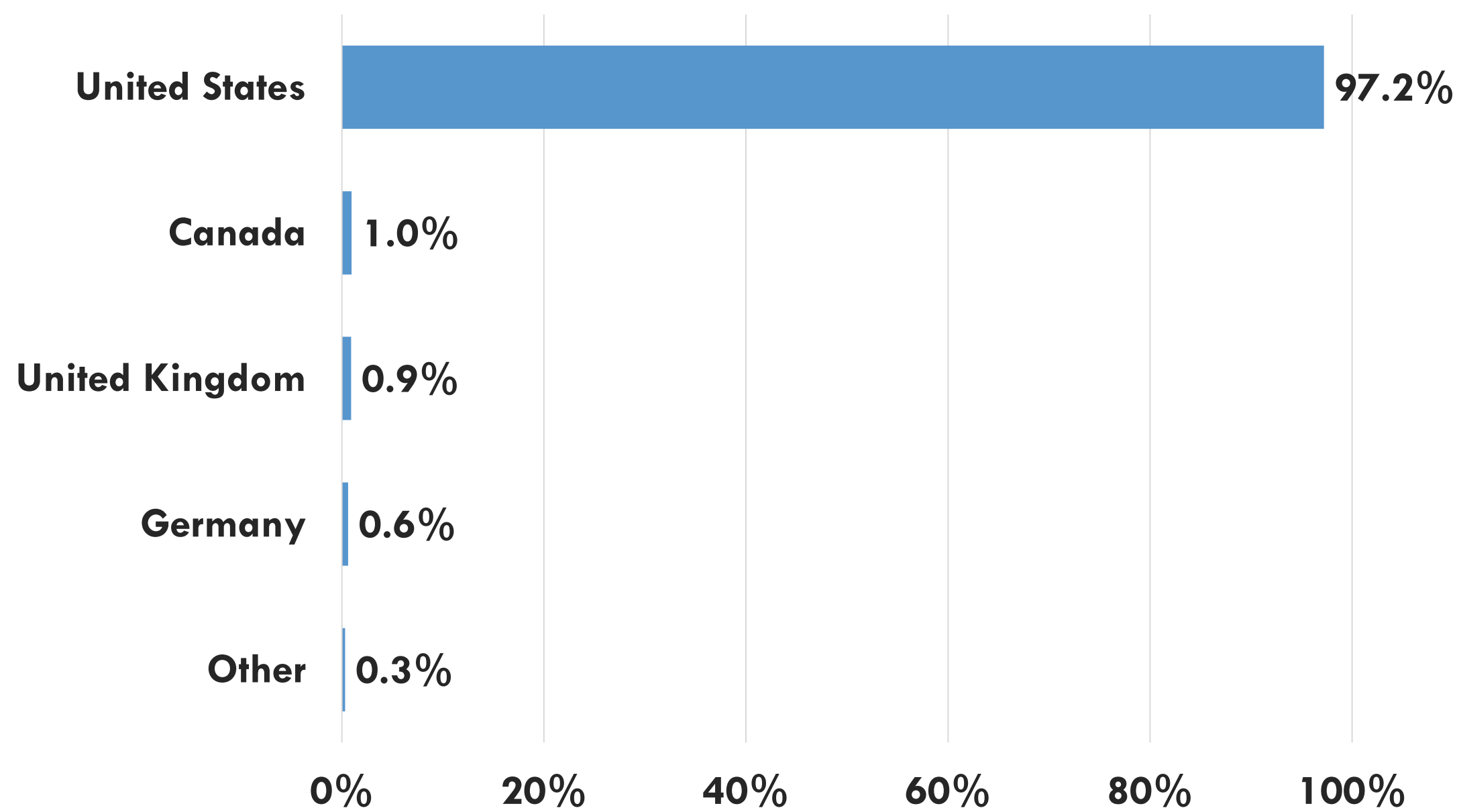
Question: In what country do you reside? Base: All Respondents.1,178 responses.

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

Over a third of St. Pete/Clearwater visitors surveyed in Q3 2022 were Florida residents (35.1%, while 64.9 percent of domestic visitors were from out of state. Ohio (6.7%), Illinois (4.0%), Texas (3.9%) and Indiana (3.8%) contributed the largest proportions of out-of-state visitors. Not surprisingly, day trippers were the most likely segment to be Florida residents (47.8%). VFRs were the segment likeliest to be from Ohio (19.3%) and hotel guests were the likeliest to be from Texas (8.1%) or Illinois (5.8%).

Figure 30: State of Origin

State	%
Florida	35.1%
Ohio	6.7%
Illinois	4.0%
Texas	3.9%
Indiana	3.8%
Pennsylvania	3.6%
Michigan	3.2%
Kentucky	3.2%
New York	3.2%
Tennessee	2.8%
Georgia	2.6%
Virginia	2.5%
North Carolina	2.4%
Iowa	2.0%
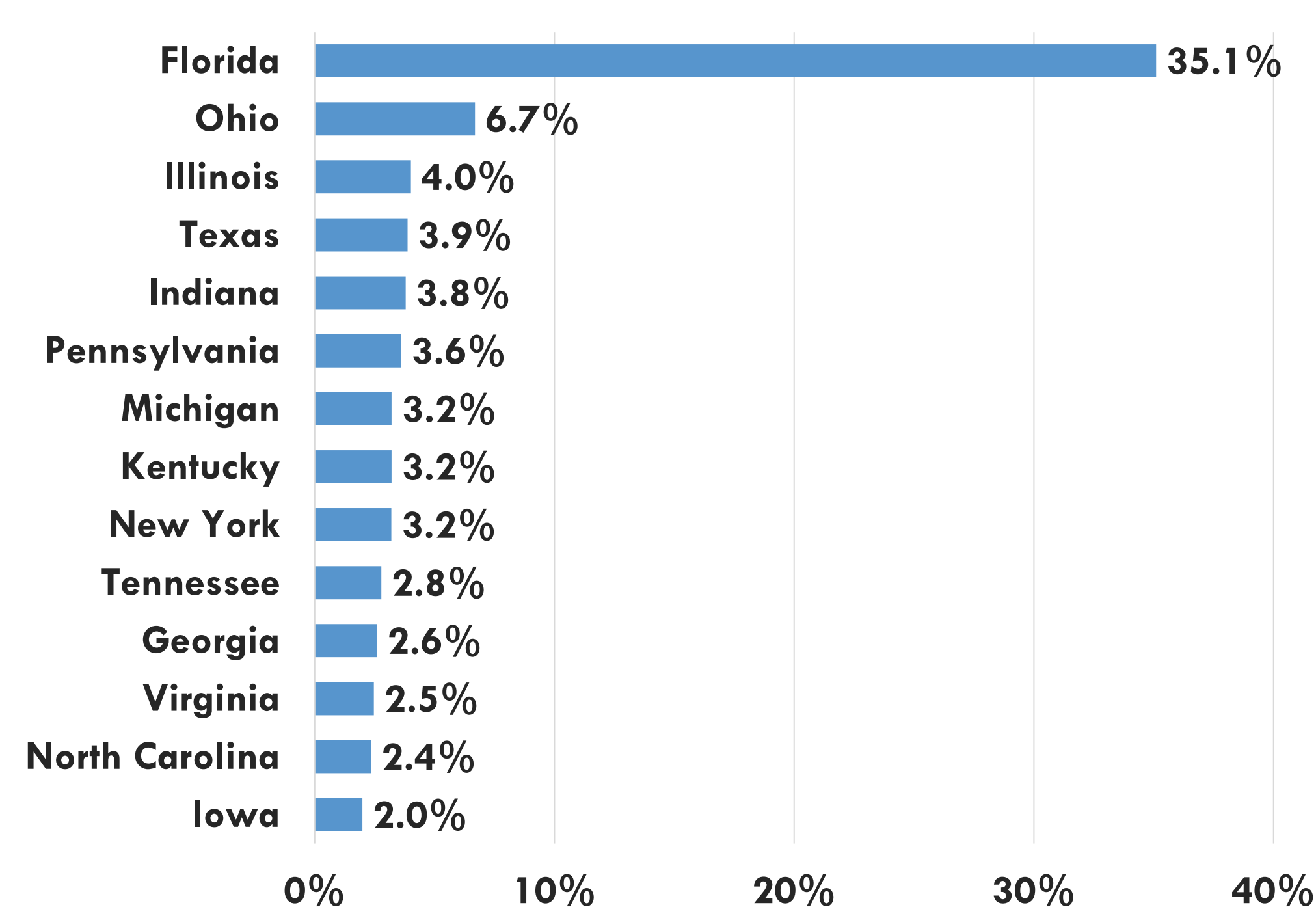
Question: What is your zip/postal code? Base: Domestic respondents. 1,118 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Florida	15.7%	16.0%	**47.8%**
Ohio	8.9%	**19.3%**	3.4%
Illinois	**5.8%**	3.6%	2.9%
Texas	**8.1%**	3.9%	2.6%
Indiana	4.0%	4.4%	3.1%
Pennsylvania	3.9%	3.9%	3.1%
Michigan	4.7%	4.2%	2.1%
Kentucky	2.4%	3.5%	3.1%
New York	3.3%	2.8%	3.0%
Tennessee	3.9%	2.8%	2.5%
Georgia	3.4%	2.7%	2.1%
Virginia	3.4%	2.7%	2.5%
North Carolina	1.5%	1.9%	2.6%
Iowa	2.6%	3.4%	1.4%
Sample Size:	**438**	**110**	**230**

POINT OF ORIGIN: MSA (DOMESTIC VISITORS)

The top three Florida visitor markets in Q3 2022 continue to be Tampa (20.8%), Sarasota/Bradenton (7.4%) and Orlando (3.1%). Out-of-state markets in the third quarter of 2022 were Chicago, IL (3.8%), Columbus, OH (2.8%), Detroit, MI (2.6%), Atlanta, GA (2.5%) and Indianapolis, IN (2.3%).

Figure 31: MSA

	0%	10%	20%	30%
Tampa-St. Petersburg-Clearwater, FL			20.8%	
Sarasota-Bradenton, FL	7.4%			
Chicago, IL	3.8%			
Orlando, FL	3.1%			
Columbus, OH	2.8%			
Detroit, MI	2.6%			
Atlanta, GA	2.5%			
Indianapolis, IN	2.3%			
Washington, DC-MD-VA	1.9%			
Cincinnati, OH-KY-IN	1.9%			
Dallas-Fort Worth, TX	1.7%			
Lakeland-Winter Haven, FL	1.5%			
Nashville, TN	1.5%			
Houston, TX	1.3%			
Charlotte-Gastonia-Rock Hill, NC-SC	1.3%			
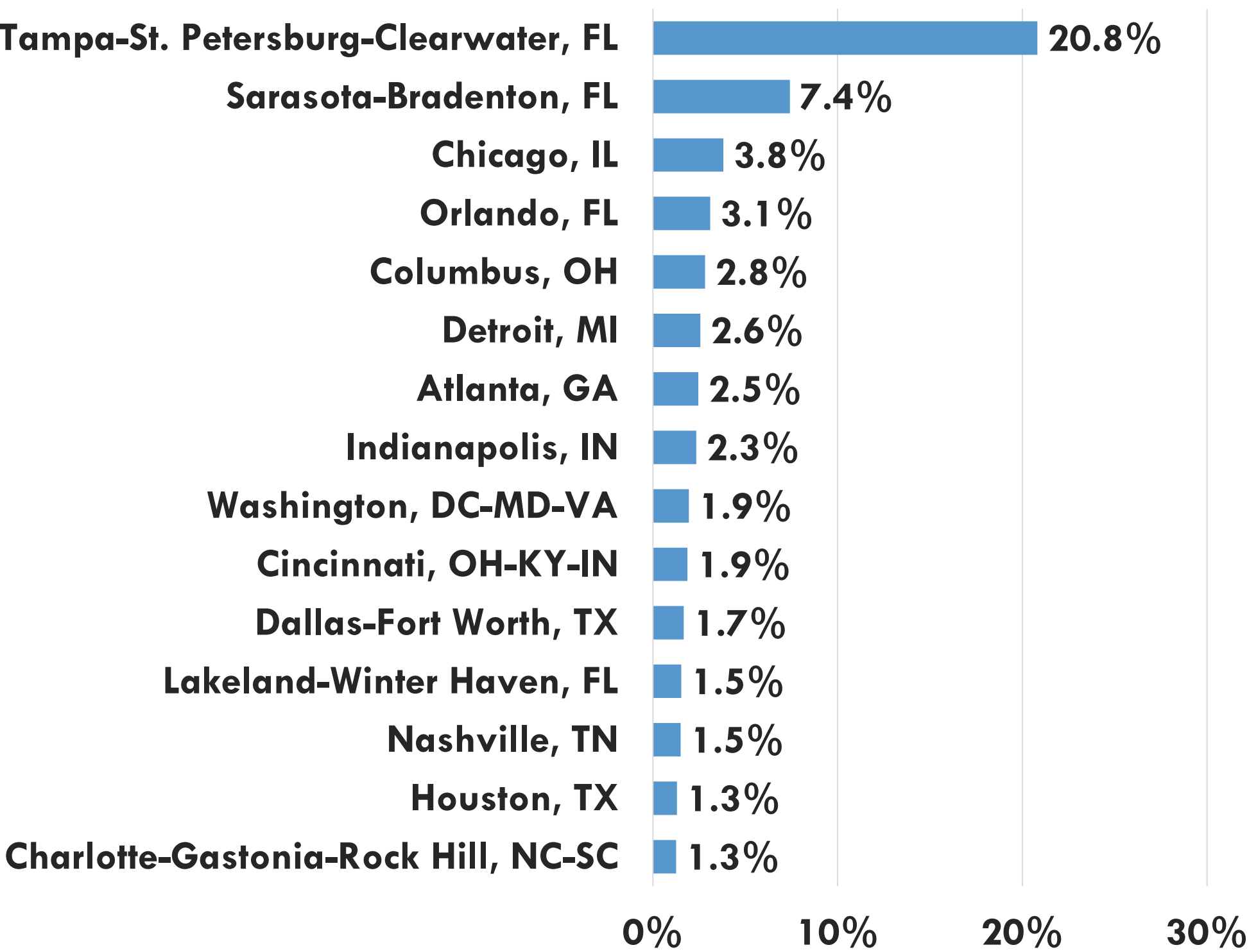
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Tampa-St. Petersburg-Clearwater, FL	1.9%	2.1%	30.6%
Sarasota-Bradenton, FL	1.2%	3.8%	10.5%
Chicago, IL	4.6%	3.5%	3.1%
Orlando, FL	4.8%	5.9%	2.6%
Columbus, OH	3.4%	7.0%	1.5%
Detroit, MI	3.4%	5.2%	1.7%
Atlanta, GA	2.7%	1.0%	2.2%
Indianapolis, IN	0.9%	4.5%	2.2%
Washington, DC-MD-VA	2.8%	0.0%	2.0%
Cincinnati, OH-KY-IN	2.1%	3.8%	1.7%
Dallas-Fort Worth, TX	3.1%	1.1%	1.1%
Lakeland-Winter Haven, FL	0.9%	0.0%	2.1%
Nashville, TN	1.6%	1.4%	1.5%
Houston, TX	1.8%	2.8%	1.1%
Charlotte-Gastonia-Rock Hill, NC-SC	0.5%	0.0%	1.6%
Sample Size:	**397**	**87**	**221**

Question: What is your zip/postal code? Base: Domestic respondents. 1,002 responses.

DEMOGRAPHIC PROFILE

The following presents the demographic profile for all St. Pete/Clearwater area visitors surveyed in Q3 of 2022.

Average Age

46.2 years old

Household Income

$115,951

Ethnicity

Caucasian – 87.4%

Latino / Hispanic – 4.9%

Black/African-American – 3.8%

Gender*

Female: 71.3%

Male: 27.8%

Marital Status

Single: 20.4%

Married/partnered: 69.1%

Children under 18: 24.5%

Orientation

Heterosexual – 94.7%

LGBTQ – 0.9%

Other – 0.4%

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

DEMOGRAPHIC PROFILE BY VISITOR SEGMENT

The following presents the demographic profiles for place of stay visitor segments surveyed in Q3 of 2022.

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

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