ST.PETE/CLEARWATER

Visit St. Pete/Clearwater

VISITOR PROFILE STUDY

Report of Findings
Q3 2023

Research prepared for Visit St. Pete/Clearwater by:

Future Partners

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Future Partners

RESEARCH OVERVIEW & METHODOLOGY

This report presents the quarterly interim findings of a comprehensive visitor profile development study conducted by Future Partners, Inc. on behalf of Visit St. Pete/Clearwater. The data presented comes from an in-person intercept survey of St. Pete/Clearwater area visitors (respondents must reside outside of Pinellas County) at locations throughout the destination. This interim report presents the topline data collected from visitors surveyed between July 2023 — September 2023.

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

In total, 1,333 completed surveys from Pinellas County visitors were collected.

Above: Images of the St. Pete/Clearwater area.
Courtesy of 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: Future Partners Field Research Team

RESEARCH OBJECTIVES

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

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

Q3 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 Co.
- **Total economic impact** – The total change in economic activity in Pinellas Co. generated by direct spending. This includes direct visitor spending as well as its induced and indirect effects in the county.
- **Tax revenues generated** – Tax revenues flowing to government coffers as a result of direct visitor spending.
- **Hotel room nights** – The estimated number of hotel room nights in Pinellas Co. generated by visitors.
- **Indirect effects** – Changes in inter-industry transactions when supplying industries respond to increased demands from the directly affected industries (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).
- **Hotel guests** – Visitors who stayed overnight in a Pinellas Co. hotel, motel, resort or inn.
- **Visiting friends/relatives (VFRs)** – Visitors who stayed overnight in the private residence of friends/family who lives in Pinellas Co.
- **Vacation rental guests** – Visitors who stayed overnight in a condo, vacation home or other private home rental in Pinellas Co.
- **Day trip visitors (regional)** – Visitors who came for the day and reside in the regional area surrounding Pinellas Co..
- **Day trip visitors (travelers)** – Visitors who came for the day, stayed overnight outside Pinellas Co. and reside outside the regional area surrounding the county.
- **Peer-to-peer home share guests** – Visitors who stayed overnight in a home rental in Pinellas Co. booked through AirBnB, VRBO or similar.
- **Other** – Visitors who stayed overnight in other types of lodging.

ECONOMIC IMPACT ESTIMATE

Visitors to Pinellas Co. - Pinellas Co. had a total of 3.75 million visitors in Q3 2023.

Direct Visitor Spending in Pinellas Co. - The tourism industry generated $1.4 billion in direct visitor spending inside the county in Q3 2023.

Total Economic Impact of Tourism to Pinellas Co. – Tourism generated a total of $2.3 billion in economic impact for Pinellas Co. in Q3 2023. The total economic impact is comprised of direct visitor spending, as well as indirect and induced effects.

Tax Revenues Generated for Pinellas Co. – The tourism industry generated $88.8 million in tax revenues in Q3 2023. Taxes directly generated by the visitors include revenue from the transient occupancy/hotel tax, sales taxes, and property taxes paid by lodging facilities.

Hotel Room Nights – An estimated 1.5 million hotel room nights were generated by visitors in Q3 2023.

Visitor Industry Payroll and Jobs supported – The tourism industry had an estimated total combined payroll of $745 million in Q3 2023, with an estimated 22,837 jobs supported county-wide.

	Q3 2022 (Jul – Sep 2022)	Q4 2022 (Oct – Dec)	Q1 2023 (Jan – Mar)	Q2 2023 (Apr – Jun)	Q3 2023 (Jul – Sep 2023)
Visitors to Pinellas Co.	3,661,043	3,434,064	4,446,523	4,225,362	3,751,685
Direct Visitor Spending in Pinellas Co.	$1,545,389,468	$1,497,959,201	$2,020,069,440	$1,656,120,785	$1,425,037,162
Total Economic Impact of Tourism to Pinellas Co.	$2,611,381,728	$2,495,167,641	$3,318,830,071	$2,782,000,040	$2,340,821,574
Tax Revenues Generated for Pinellas Co.	$97,135,879	$93,546,346	$129,549,188	$109,694,932	$88,790,118
Hotel Room Nights	1,537,308	1,606,362	1,850,307	1,704,274	1,505,245
Visitor Industry Payroll	$838,810,396	$786,437,547	$1,047,151,186	$883,044,582	$744,509,598
Jobs Supported	25,772	24,130	31,883	26,964	22,837

Q3 2023
St. Pete/Clearwater
Overall Visitor Summary

Q3 2023 comparison to Q3 2022 and Q3 2021

VISITOR SUMMARY: YEAR-OVER-YEAR COMPARISON

Average Time Between Decision to Visit & Arrival

49 — Q3-21
55 — Q3-22
47 — Q3-23

Average Daily Spending

$241
Q3-23

$330
Q3-22

$280
Q3-21

Travel Party Size

2.5
Q3-23

Q3-22   2.9
Q3-21   2.7

Average Days & Nights

Nights: 2.0, 2.1, 2.3
Days: 3.0, 3.0, 3.3

■ Q3-21 ■ Q3-22 ■ Q3-23
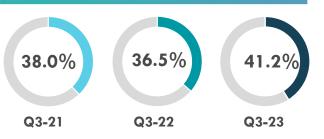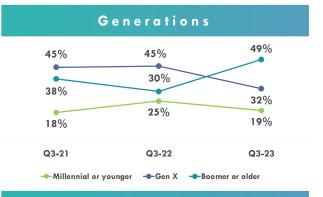
Percent Staying Overnight

38.0% — Q3-21
36.5% — Q3-22
41.2% — Q3-23

Generations

45%   45%   49%
38%   30%   32%
18%   25%   19%

Q3-21   Q3-22   Q3-23

—— Millennial or younger —— Gen X —— Boomer or older

Average Age
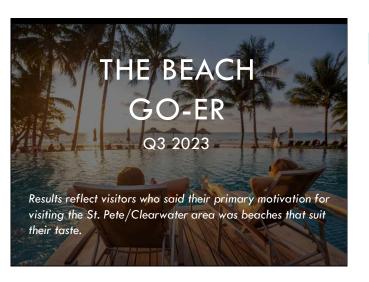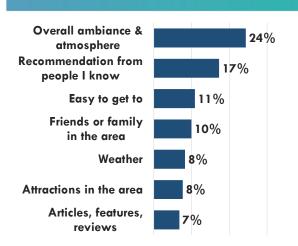
48.2 — Q3-21
46.2 — Q3-22
50.6 — Q3-23

Average Income

$83,066
Q3-23

Q3-22 $115,951
Q3-21 $105,882

Q3 2023
Visitor Summary
by Traveler Segment

THE BEACH GO-ER

Q3 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

- Overall ambiance & atmosphere — 24%
- Recommendation from people I know — 17%
- Easy to get to — 11%
- Friends or family in the area — 10%
- Weather — 8%
- Attractions in the area — 8%
- Articles, features, reviews — 7%

Domestic vs. International

United States Resident, 90%

International Visitor, 10%

TOP STATES OF ORIGIN

Florida	29%
Ohio	11%
Kentucky	5%

Top Communities Visited

Clearwater Beach	53%
Madeira Beach	42%
St. Petersburg	27%
St. Pete Beach	21%
Treasure Island	12%

Top Activities

Restaurants	Swimming	Shopping	Bars/Nighlife
85%	67%	55%	33%

Length of Stay

5.0 Days on Average

Travel Party Size

2.9 People

29.2% Traveled with Children

Daily Spending

$160 Per Person

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THE ARTS & CULTURE VISITOR

Q3 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

Factor	%
Friends or family in the area	26%
Attractions in the area	23%
The area's unique culture	20%
Recommendation from people I know	15%
Easy to get to	11%
Overall ambiance & atmosphere	9%

Domestic vs. International

United States Resident, 81%

International Visitor, 19%

TOP STATES OF ORIGIN

State	%
Florida	69%
North Carolina	5%
California	4%
Massachusetts	4%

Top Communities Visited

Community	%
St. Petersburg	98%
St. Pete Beach	7%
Gulfport	7%
Pass-A-Grill Beach	6%
Madeira Beach	5%

Top Activities

Restaurants	Friends/Family	Shopping	Beach
73%	22%	20%	18%

Length of Stay

2.0 Days on Average

Travel Party Size

2.4 People

13.9% Traveled with Children

Daily Spending

$98 Per Person

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THE AFFLUENT VISITOR

Q3 2023

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

Factors Important to Destination Decision

- Attractions in the area — 36%
- Arts & cultural offerings — 32%
- Recommendation from people I know — 24%
- The area's unique culture — 23%
- Friends or family in the area — 23%
- Beaches that suit my tastes — 12%

Domestic vs. International

United States Resident, 38%

International Visitor, 62%

TOP STATES OF ORIGIN

Florida	43%
New York	10%
New Jersey	7%

Top Communities Visited

St. Petersburg	82%
Clearwater Beach	27%
Gulfport	9%
Dunedin	9%
St. Pete Beach	7%

Top Activities

Museums	Restaurants	Beach	Friends/Family
74%	73%	27%	15%

Length of Stay

2.3 Days on Average

Travel Party Size

2.6 People

28.1% Traveled with Children

Daily Spending

$151 Per Person

Future Partners

THE FAMILY TRAVELER

Q3 2023

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

Domestic vs. International

United States Resident, 79%

International Visitor, 21%

TOP STATES OF ORIGIN

Florida	39%
Ohio	9%
Massachusetts	8%
New York	8%

Length of Stay

3.4 Days on Average

Factors Important to Destination Decision

Beaches that suit my tastes	36%
Attractions in the area	26%
Friends or family in the area	20%
Recommendation from people I know	18%
Arts & cultural offerings	10%

Top Communities Visited

St. Petersburg	61%
Clearwater Beach	34%
Madeira Beach	23%
St. Pete Beach	12%
Treasure Island	5%

Travel Party Size

4.0 **People**

100% Traveled with Children

Top Activities

76%	58%	38%	36%
Restaurants	Beach	Shopping	Swimming

Daily Spending

$97

Per Person

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THE MILLENNIAL VISITOR

Q3 2023

Results reflect visitors between the age of 27-42

Factors Important to Destination Decision

- Beaches that suit my tastes — **39%**
- Recommendation from people I know — **31%**
- Attractions in the area — **16%**
- Friends or family in the area — **13%**
- Easy to get to — **11%**
- Articles, features, reviews — **11%**

Domestic vs. International

United States Resident, 86%

International Visitor, 14%

POINT OF ORIGIN: TOP STATES

Florida	39%
New York	10%
Kentucky	6%

Top Communities Visited

St. Petersburg	53%
Clearwater Beach	39%
Madeira Beach	30%
St. Pete Beach	15%
Treasure Island	7%

Top Activities

80%	68%	53%	51%
Restaurants	Beach	Swimming	Shopping

Length of Stay

3.2 Days on Average

Travel Party Size

2.7 People

22.9% Traveled with Children

Daily Spending

$156 Per Person

THE GEN X VISITOR

Q3 2023

Results reflect of visitors between the age of 42-58

Factors Important to Destination Decision

Beaches that suit my tastes	29%
Friends or family in the area	27%
Attractions in the area	24%
Recommendation from people I know	18%
Arts & cultural offerings	14%
Overall ambiance & atmosphere	12%

Domestic vs. International

United States Resident, 75%

International Visitor, 25%

POINT OF ORIGIN: TOP STATES

Florida	42%
Ohio	8%
Georgia	4%
New York	4%
California	4%
Texas	4%
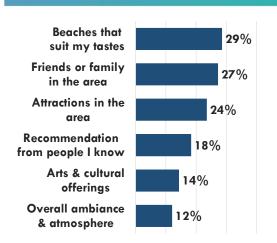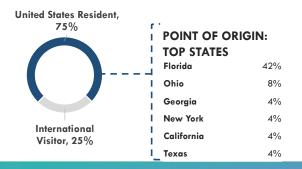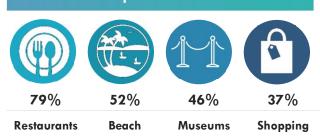
Top Communities Visited

St. Petersburg	66%
Clearwater Beach	32%
Madeira Beach	19%
St. Pete Beach	9%%
Dunedin	7%

Top Activities

79%	52%	46%	37%
Restaurants	Beach	Museums	Shopping

Length of Stay

3.3 Days on Average

Travel Party Size

2.8 **People**

33.8% Traveled with Children

Daily Spending

$126 **Per Person**

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THE BABY BOOMER VISITOR

Q3 2023

Results reflect of visitors between the age of 59-77

Factors Important to Destination Decision

Factor	%
Attractions in the area	37%
Friends or family in the area	33%
Beaches that suit my tastes	17%
Arts & cultural offerings	16%
The area's unique culture	12%
Recommendation from people I know	11%
Overall ambiance & atmosphere	10%

Domestic vs. International

United States Resident, 91%

International Visitor, 9%

POINT OF ORIGIN: TOP STATES

Florida	59%
Ohio	5%
North Carolina	3%

Top Communities Visited

Community	%
St. Petersburg	71%
Madeira Beach	23%
Clearwater Beach	17%
St. Pete Beach	8%
Dunedin	8%

Top Activities

72%	54%	38%	36%
Restaurants	Museums	Shopping	Beach

Length of Stay

2.6
Days on Average

Travel Party Size

2.3 People

7% Traveled with Children

Daily Spending

$115
Per Person

Future Partners

Planning the
St. Pete/Clearwater Trip
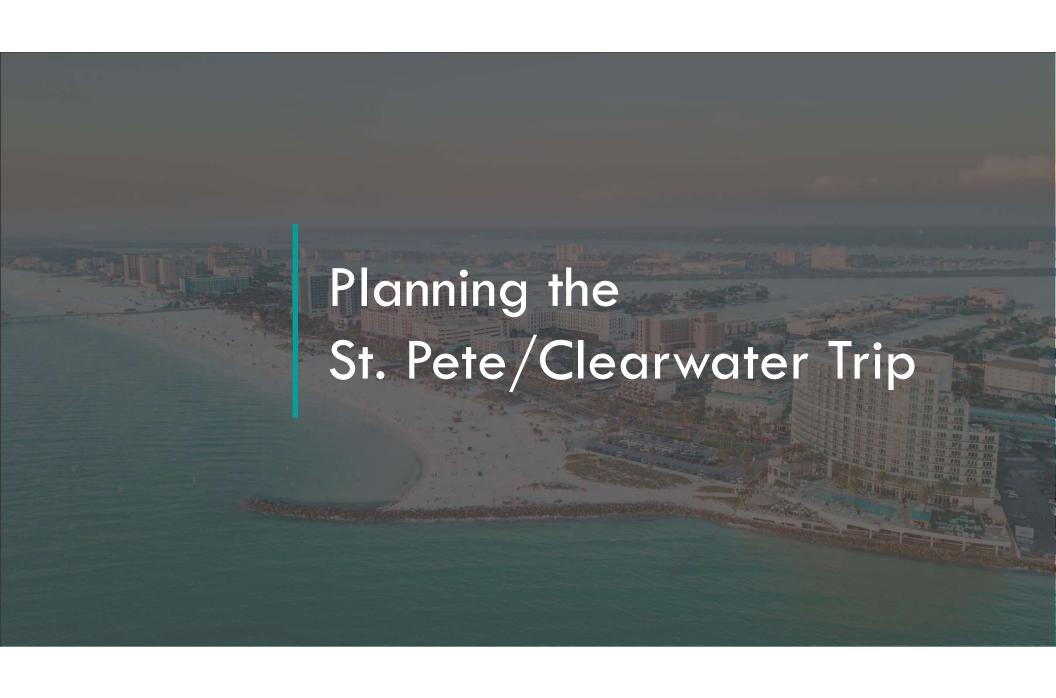
WHEN THE DECISION TO VISIT WAS MADE

Visitors decided to visit approximately 6.7 weeks (47 days) prior to their arrival – down from 7.9 weeks (55 days) in Q3 2022.
Hotel Guests made the decision to visit 77 days in advance compared to 103 days in Q3 2022. VFRs decided 54 days in advance (down from 68 days in Q3 2022) and Day Trippers made the decision 31 days in advance, similar to Q3 2022 with 32 days).

Figure 1: Average Time Between Decision to Visit and Arrival

46.9 Days in Advance

Detail by Type of Visitor

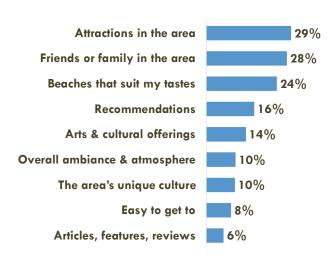|	Hotel	VFR	Day Trip
Base Size:	355	221	521
Average Days between Decision and Visit	77.1	54.4	30.9

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. 1,333 responses.

IMPORTANT FACTORS IN DESTINATION DECISION

Area attractions (29%), friends/family in the area (28%) and/or beaches (24%) were the top factors for visiting the St. Pete/Clearwater area. Beaches were again the most important factor for Hotel Guests (60%), while attractions (33%) and arts & cultural offerings (37%) were the most important for Day Trippers.

Figure 2: Important to Decision to Visit

Factor	Percentage
Attractions in the area	29%
Friends or family in the area	28%
Beaches that suit my tastes	24%
Recommendations	16%
Arts & cultural offerings	14%
Overall ambiance & atmosphere	10%
The area's unique culture	10%
Easy to get to	8%
Articles, features, reviews	6%

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size:	339	219	511
Attractions in the area	14%	17%	37%
Friends or family in the area	10%	91%	29%
Beaches that suit my tastes	60%	14%	8%
Recommendations	24%	2%	14%
Arts & cultural offerings	7%	11%	17%
Overall ambiance & atmosphere	17%	9%	5%
The area's unique culture	5%	10%	11%
Easy to get to	12%	1%	8%
Articles, features, reviews, etc.	13%	0%	3%

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. 1,299 responses.

IMPORTANT FACTORS IN DESTINATION DECISION

Hotel Guests said that beaches, weather, overall ambiance & atmosphere, and recommendations were the most important factors when deciding to visit St. Pete/Clearwater.

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

	Total	Hotel	VFR	Day Trip
Base Size	1,299	339	219	511
Attractions in the area	29%	14%	17%	37%
Friends or family in the area	28%	10%	91%	29%
Beaches that suit my tastes	24%	60%	14%	8%
Recommendation from people I know	16%	24%	2%	14%
Arts & cultural offerings	14%	7%	11%	17%
Overall ambiance & atmosphere	10%	17%	9%	5%
The area's unique culture	10%	5%	10%	11%
Easy to get to	8%	12%	1%	8%
Articles, features, reviews, etc. about the area	6%	13%	0%	3%
Shopping opportunities	5%	2%	1%	7%
St. Pete Pier	5%	1%	0%	7%
Outdoor recreational opportunities	3%	3%	1%	4%
Lifelong desire to visit	3%	6%	1%	3%
Special event(s) and/or festival(s)	3%	3%	4%	3%
Weather	3%	6%	4%	1%
Sports or sporting events	2%	4%	2%	2%
Fishing opportunities	2%	1%	1%	3%
Restaurants, cuisine, food scene	2%	2%	0%	2%
Good deal on airfare	2%	4%	2%	0%
Good hotel rate	1%	4%	0%	0%
A specific attraction	1%	0%	0%	2%
Scenic beauty	1%	2%	1%	1%
The St. Pete/Clearwater area is family- friendly	1%	2%	0%	0%
Appealing hotels/resorts and other lodging options	1%	5%	0%	0%
Advertisements for the area	1%	2%	0%	1%
The St. Pete/Clearwater area is romantic	0%	1%	0%	0%
Breweries/Distilleries/Craft beer scene	0%	0%	0%	0%
Golf	0%	0%	0%	0%
Life's Rewards Show on Amazon Prime	0%	0%	0%	0%

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. 1,299 responses.

TRAVEL PLANNING RESOURCES USED

Pre-arrival, respondents cited opinions of friends/relatives and review websites as the most used travel planning resources. Pre-arrival usage of the official Visit St. Pete/Clearwater website saw a decrease in Q3 2022 (21%, from 6% in Q3 2023). In-market usage of VisitStPeteClearwater.com saw an increase in Q3 2022 (5%, from <1% in Q3 2022).

Figure 3: Resources Used before Arrival and While In Market

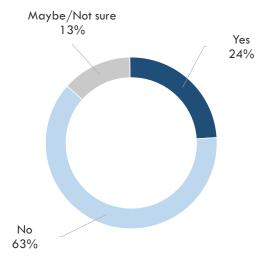|	Used Pre-Arrival	Used In-Market
Opinions of friends or relatives	65%	21%
Review websites	39%	41%
Online travel agencies (Expedia, etc.)	20%	1%
Social Media content	16%	4%
YouTube or other online videos	10%	0%
VisitStPeteClearwater.com	**6%**	**5%**
Newspaper travel section	3%	0%
Television programming	2%	1%
Travel agency (traditional, offline)	2%	1%
Travel guides, brochures	1%	16%
Lifestyle or travel magazines	1%	0%
Gulf to Bay Magazine	**0%**	**1%**
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. ,1299 responses.

Detail by Traveler Segment

	Hotel		VFR		Day Trip	
Base Size	339		219		511	
	Pre-Arrival	In-Market	Pre-Arrival	In-Market	Pre-Arrival	In-Market
Opinions of friends or relatives	48%	6%	95%	61%	71%	24%
Review websites	65%	66%	8%	12%	28%	31%
Online travel agencies	45%	1%	10%	0%	10%	1%
Social Media content	25%	5%	7%	1%	13%	3%
YouTube or other online videos	18%	1%	3%	0%	6%	1%
VisitStPeteClearwater.com	7%	11%	3%	4%	5%	3%
Newspaper travel section	1%	0%	1%	0%	4%	0%
Television programming	2%	2%	0%	0%	2%	0%
Travel agency (traditional, offline)	3%	1%	0%	0%	1%	1%
Travel guides, brochures	3%	30%	0%	7%	0%	10%
Lifestyle or travel magazines	2%	0%	0%	0%	0%	0%
Gulf to Bay Magazine	1%	3%	0%	1%	0%	1%
Radio programming	0%	0%	0%	0%	0%	0%

EARNED & PAID MEDIA RECALL
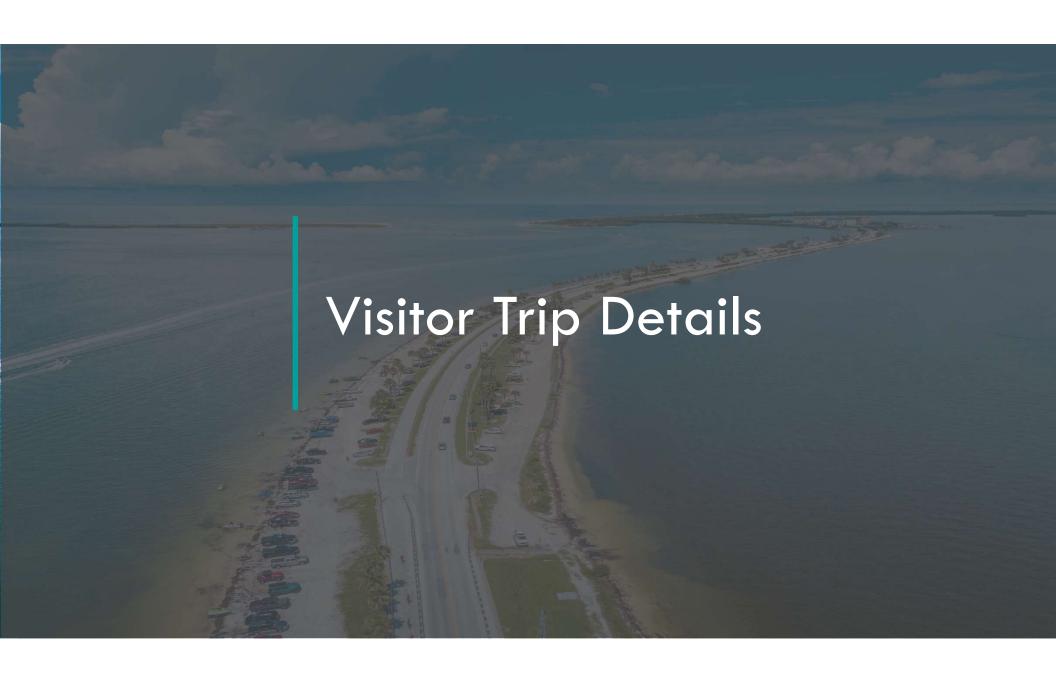
Nearly one-quarter of visitors recalled seeing, hearing, and/or reading advertisements or promotions for St. Pete/Clearwater in the past six months (24% up from 18% in Q3 2022).

Figure 4: Media Recall

Maybe/Not sure
13%

Yes
24%

No
63%

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	355	221	521
Yes	32.5%	7.7%	23.4%
No	55.3%	82.1%	63.9%
Maybe/Not sure	12.1%	10.1%	12.7%

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 1,333 responses.

Visitor Trip Details

PRIMARY REASON FOR VISIT

Overall, vacation was the primary reason for a visit to the St. Pete/Clearwater area in Q3 2023 (46%). Two-thirds of Hotel Guests (65%) and over one-third of Day Trippers (36%) cited vacation as their primary reason for visiting.

Figure 5: Primary Reason for Visit

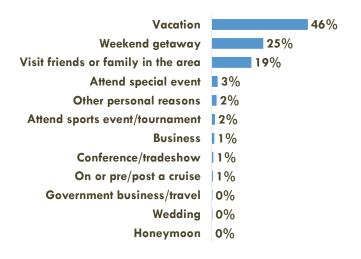| Reason	%
Vacation	46%
Weekend getaway	25%
Visit friends or family in the area	19%
Attend special event	3%
Other personal reasons	2%
Attend sports event/tournament	2%
Business	1%
Conference/tradeshow	1%
On or pre/post a cruise	1%
Government business/travel	0%
Wedding	0%
Honeymoon	0%

Detail by Traveler Segment
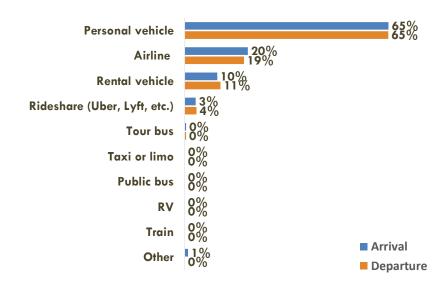
	Hotel	VFR	Day Trip
Base Size	355	221	521
Vacation	65%	37%	36%
Weekend getaway	19%	10%	30%
Visit friends or family in the area	5%	49%	23%
Attend special event	2%	0%	4%
Other personal reasons	1%	2%	3%
Attend sports event/tournament	2%	0%	2%
Business	2%	1%	1%
Conference/tradeshow	2%	0%	0%
On or pre/post a cruise	1%	0%	0%
Government business/travel	0%	0%	0%
Wedding	1%	1%	0%
Honeymoon	1%	0%	0%

Question: What is your primary reason for visiting the St. Pete/Clearwater Area? (Select one)
Base: All Respondents. 1,333 responses.

METHOD OF ARRIVAL & DEPARTURE

The preferred method of arrival continues to be personal vehicle (65%). Day Trippers were the most likely segment to arrive by personal vehicle (80%). VFRs (47%) and Hotel Guests (39%) were the segments most likely to arrive by airline.

Figure 6: Method of Arrival and Departure

Detail by Traveler Segment

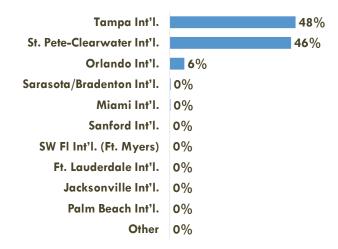|	Hotel		VFR		Day Trip	
Base Size	355		221		521	
	Arrival	Departure	Arrival	Departure	Arrival	Departure
Personal vehicle	38%	38%	47%	47%	80%	79%
Airline	39%	37%	42%	42%	7%	6%
Rental vehicle	19%	19%	7%	7%	8%	9%
Rideshare (Uber, Lyft, etc.)	3%	3%	4%	4%	4%	4%
Tour bus	0%	0%	0%	0%	1%	1%
Taxi or Limo	0%	0%	0%	0%	0%	0%
Public bus	0%	0%	0%	0%	0%	0%
RV	0%	0%	0%	0%	0%	0%
Train	0%	0%	0%	0%	0%	0%
Other	1%	1%	0%	0%	1%	1%

Question: How did you arrive in the St. Pete/Clearwater area and how will you leave? (Select all that apply) Base: All Respondents. 1,333 responses.

ARRIVAL AIRPORT

Nearly equal amounts of air travelers arrived via Tampa International (48%, a decrease from 81% in Q3 2022) as they did into St. Pete-Clearwater International (46%, an increase from only 9% in Q3 2023). Across all segments, there was a significant increase of visitors choosing St. Pete-Clearwater International compared to Q3 2022.

Figure 7: Arrival Airport

Airport	Percentage
Tampa Int'l.	48%
St. Pete-Clearwater Int'l.	46%
Orlando Int'l.	6%
Sarasota/Bradenton Int'l.	0%
Miami Int'l.	0%
Sanford Int'l.	0%
SW Fl Int'l. (Ft. Myers)	0%
Ft. Lauderdale Int'l.	0%
Jacksonville Int'l.	0%
Palm Beach Int'l.	0%
Other	0%

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	136	87	16
Tampa Int'l.	53%	50%	39%
St. Pete-Clearwater Int'l.	45%	47%	48%
Orlando Int'l.	2%	1%	13%
Sarasota/Bradenton Int'l.	1%	0%	0%
Miami Int'l.	0%	2%	0%
Sanford Int'l.	0%	0%	0%
SW Fl Int'l. (Ft. Myers)	0%	0%	0%
Ft. Lauderdale Int'l.	0%	0%	0%
Jacksonville Int'l.	0%	0%	0%
Palm Beach Int'l.	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. 365 responses.

ARRIVAL AIRLINE (BY AIRPORT)

All visitors who flew in to St. Pete-Clearwater International in Q3 2023 arrived via Allegiant. Visitors using Tampa International Airport most commonly flew Southwest Airlines (21%), Delta (18%), United (7%), Jet Blue (7%), and American Airlines (7%).

Figure 8: Arrival Airline Airport

Tampa Int'l (TIA)

Airline	%
Allegiant	0%
Southwest	21%
Delta Airlines	18%
United	7%
Jet Blue	7%
American Airlines	7%
Sun Country	0%
Alaska Airlines	0%
Other	40%

St. Pete-Clearwater Int'l (PIE)

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

Detail by Traveler Segment
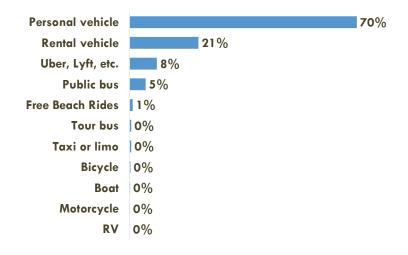
	Hotel		VFR		Day Trip	
Base Size	132		84		14	
	TIA	**PIE**	**TIA**	**PIE**	**TIA**	**PIE**
Allegiant	0%	**100%**	0%	**100%**	0%	**100%**
Southwest Airlines	24%	0%	24%	0%	0%	0%
Delta Airlines	12%	0%	16%	0%	45%	0%
United	12%	0%	7%	0%	0%	0%
Jet Blue	9%	0%	3%	0%	0%	0%
American Airlines	4%	0%	15%	0%	0%	0%
Sun Country	1%	0%	0%	0%	0%	0%
Alaska Airlines	0%	0%	0%	0%	0%	0%
Other	38%	0%	35%	0%	55%	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. 334 responses.

In-Market Transportation Used

Similar to Q3 2022, personal vehicles (70%) and rental vehicles (21%) continued to be the most common transportation within St. Pete/Clearwater. Day Trippers and VFRs were the most likely to use a personal vehicle as transportation (84% and 82%, respectively), while Hotel Guests were again the most likely segment to rent a vehicle (39%).

Figure 9: Transportation Used In-Market

Transportation	%
Personal vehicle	70%
Rental vehicle	21%
Uber, Lyft, etc.	8%
Public bus	5%
Free Beach Rides	1%
Tour bus	0%
Taxi or limo	0%
Bicycle	0%
Boat	0%
Motorcycle	0%
RV	0%

Detail by Traveler Segment
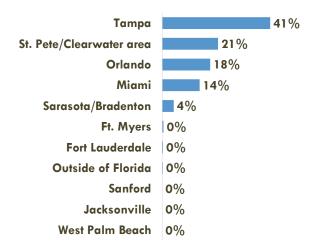
	Hotel	VFR	Day Trip
Base Size	355	221	521
Personal vehicle	39%	**82%**	**84%**
Rental vehicle	**39%**	15%	12%
Uber, Lyft, etc.	21%	9%	4%
Public bus	10%	7%	2%
Free Beach Rides	3%	1%	0%
Tour bus	0%	0%	1%
Taxi or limo	1%	0%	0%
Bicycle	0%	1%	0%
Boat	0%	1%	0%
Motorcycle	0%	1%	0%
RV	0%	0%	0%

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. 1,333 responses.

RENTAL VEHICLE PICK-UP LOCATION

Four-in-ten Pinellas County visitors picked up their rental vehicle in Tampa (41%, down from 78% in Q3 2022). One-in-five visitors picked up their rental vehicle in St. Pete/Clearwater (21%, an increase from 3% in Q3 2022).

Figure 10: Rental Vehicle Pick-Up City

City	%
Tampa	41%
St. Pete/Clearwater area	21%
Orlando	18%
Miami	14%
Sarasota/Bradenton	4%
Ft. Myers	0%
Fort Lauderdale	0%
Outside of Florida	0%
Sanford	0%
Jacksonville	0%
West Palm Beach	0%

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	136	34	32
Tampa	46%	64%	25%
St. Pete/Clearwater area	**20%**	**24%**	**14%**
Orlando	17%	5%	25%
Miami	13%	7%	25%
Sarasota/Bradenton	1%	0%	11%
Ft. Myers	1%	0%	0%
Fort Lauderdale	1%	0%	0%
Outside of Florida	0%	0%	0%
Sanford	0%	0%	0%
Jacksonville	0%	0%	0%
West Palm Beach	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. 318 responses.

TRAVEL PARTY SIZE

The average travel party size was 2.5 people. One-in-five visitors traveled with children in Q3 2023 (18%, compared to 26% in Q3 2022.

Figure 11: Travel Party Size
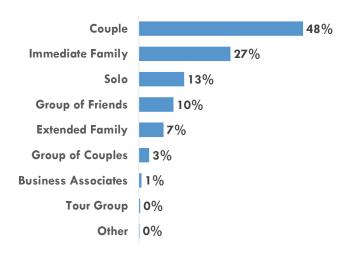
	Total	Hotel	VFR	Day Trip
Base Size	1,333	355	221	521
Male adults (18 yrs. +)	1.0	1.0	0.8	1.0
Female adults (18 yrs. +)	1.2	1.2	1.1	1.2
Male children (0 to 17 yrs.)	0.1	0.2	0.1	0.1
Female children (0 to 17 yrs.)	0.2	0.2	0.1	0.2
Average Travel Party Size	**2.5**	**2.6**	**2.1**	**2.5**
% with children in Party	18%	23%	13%	17%

Question: How many people of each type are in your immediate travel party, including yourself?
Base: All Respondents. 1,333 responses.

TRAVEL PARTY COMPOSITION

Nearly half of St. Pete/Clearwater visitors traveled as a couple (48%, similar to 51% in Q3 2022). Additionally, less than one-third said they were traveling with immediate family (27%, down from 43% in Q3 2022), while one-in-ten were traveling solo (13%). Hotel Guests and Day Trippers were most likely to travel as a couple (56% and 46%, respectively), while VFRs were again the segment most likely to travel solo (39%, up from 12% in Q3 2022).

Figure 12: Travel Party Composition

Couple	48%
Immediate Family	27%
Solo	13%
Group of Friends	10%
Extended Family	7%
Group of Couples	3%
Business Associates	1%
Tour Group	0%
Other	0%

Detail by Traveler Segment

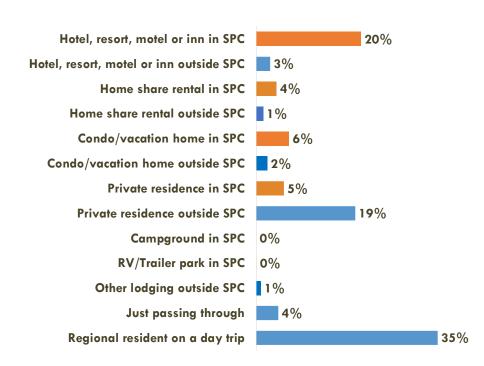|	Hotel	VFR	Day Trip
Base Size	355	221	521
Couple	**56%**	36%	**46%**
Immediate Family	25%	26%	27%
Solo	5%	**39%**	14%
Group of Friends	7%	5%	12%
Extended Family	7%	4%	7%
Group of Couples	3%	2%	3%
Business Associates	2%	0%	0%
Tour Group	0%	0%	0%
Other	0%	0%	0%

Question: Which best describes your travel group on this trip? Are you…? (Select all that apply)
Base: All Respondents. 1,333 responses.

Lodging Type

Approximately one-third of all visitors in Q3 2023 (30%) stayed overnight in the destination. A large proportion of overnight visitors stayed in paid accommodations such as a hotel, resort, motel or inn (20%), home share rental (4%), or in a condo/vacation home (6%).

Day Trippers, including those staying in paid or private accommodations outside Pinellas County and regional residents on leisure day trips, represented two-thirds of visitors (65%).

Figure 13: Type of Lodging

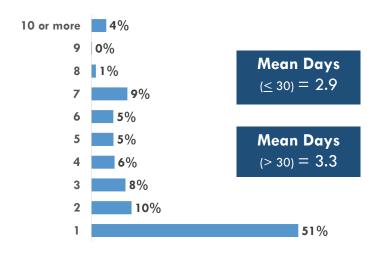| Lodging Type	Percentage
Hotel, resort, motel or inn in SPC	20%
Hotel, resort, motel or inn outside SPC	3%
Home share rental in SPC	4%
Home share rental outside SPC	1%
Condo/vacation home in SPC	6%
Condo/vacation home outside SPC	2%
Private residence in SPC	5%
Private residence outside SPC	19%
Campground in SPC	0%
RV/Trailer park in SPC	0%
Other lodging outside SPC	1%
Just passing through	4%
Regional resident on a day trip	35%

Question: Where are you staying overnight on this trip to the St. Pete/Clearwater area? (Select one) Base: All Respondents. 1,333 responses.

DAYS SPENT IN ST. PETE/CLEARWATER

Among those staying for less than 30 days, the average visitor stayed for 2.9 days. VFRs had the longest length of stay at almost 7 days, followed by Hotel Guests with almost 5 days.

Figure 14: Days in Market

Days	Percent
10 or more	4%
9	0%
8	1%
7	9%
6	5%
5	5%
4	6%
3	8%
2	10%
1	51%

Mean Days (≤ 30) = 2.9

Mean Days (> 30) = 3.3

Detail by Traveler Segment

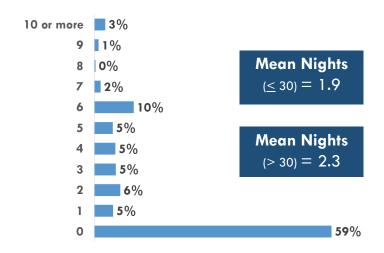|	Hotel	VFR	Day Trip
Base Size	355	216	520
10 or more	3%	20%	1%
9	0%	2%	0%
8	2%	6%	0%
7	19%	18%	1%
6	11%	13%	1%
5	14%	15%	1%
4	13%	13%	2%
3	20%	10%	5%
2	16%	2%	10%
1	1%	1%	79%
Mean Days (<30)	**4.7**	**6.8**	**1.4**
Mean Days (>30)	**4.7**	**7.7**	**1.8**

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. 1,333 responses.

Nights Spent in St. Pete/Clearwater

The typical visitor spent nearly 2 nights in Pinellas Co. in Q3 2023 (down slightly from 2.1 nights in Q3 2022). Less than one-in-ten spent a week or more in the destination (6%). VFRs stayed the longest, with nearly one-third staying 7 or more nights (31%, up from 13% in Q3 2022).

Figure 15: Nights in Market

Mean Nights (≤ 30) = 1.9

Mean Nights (> 30) = 2.3

Nights	%
10 or more	3%
9	1%
8	0%
7	2%
6	10%
5	5%
4	5%
3	5%
2	6%
1	5%
0	59%

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)	**3.8**	**6.0**	**--**
Mean Nights (>30)	**3.8**	**6.9**	**--**

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. 1,333 responses.

DAILY SPEND IN-MARKET

St. Pete/Clearwater visitors spent an average of $241 per travel party (down from $330 in Q3 2022). The average visitor represented $126 in daily spending (up from $117 in Q3 2022). Hotel guests reported the highest spending, averaging $466 per travel party (down from $513 in Q3 2022), with $230 spent per day on accommodations (down from $276 in Q3 2022).
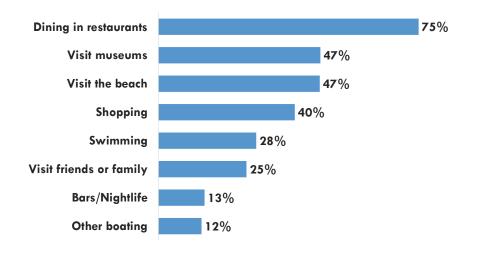
Figure 16: Per Day Travel Party Spending

	$
Restaurants	$79
Hotel/motel/inn/lodging	$63
Retail store purchases	$44
Other Entertainment & sightseeing	$35
Gas, parking and local transportation	$11
Car rental (in area only)	$6
Other	$3

Mean Travel Party Spending = $241

Avg # of People Covered by Spending = 1.9

Mean Spending per Person = $126

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	355	221	521
Restaurants	$119	$73	$65
Hotel/motel/inn/lodging	$230	$2	$6
Retail store purchases	$59	$44	$38
Other Entertainment & sightseeing	$28	$22	$40
Gas, parking and local transportation	$13	$7	$11
Car rental (in area only)	$13	$5	$2
Other	$4	$6	$2
Mean Spending per Travel Party	**$466**	**$159**	**$163**
# of People Covered by Spending	2.2	1.6	1.8
Mean Spending per Person	**$214**	**$97**	**$88**

Question: PER DAY, approximately how much will you spend on each of the following while in the St. Pete/Clearwater area? Base: All Respondents. 1,315 responses.

TRIP ACTIVITIES

The St. Pete/Clearwater trip mostly included dining in restaurants (75%), visiting a museum (47%), and/or the beach (47%). Additionally, visitors went shopping (40%), swimming (28%), saw family or friends (25%), enjoyed bar/nightlife (13%) and/or went boating (12%).

Figure 17: Trip Activities

Activity	Percentage
Dining in restaurants	75%
Visit museums	47%
Visit the beach	47%
Shopping	40%
Swimming	28%
Visit friends or family	25%
Bars/Nightlife	13%
Other boating	12%

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	355	221	521
Dining in restaurants	91%	76%	68%
Visit museums	29%	50%	54%
Visit the beach	82%	71%	28%
Shopping	56%	47%	30%
Swimming	63%	41%	10%
Visit friends or family	11%	77%	27%
Bars/Nightlife	36%	20%	3%
Other boating	22%	13%	6%

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. 1,333 responses.

TRIP ACTIVITIES

Hotel Guests and VFRs were the most likely to have dined in a restaurant (91% and 76%, respectively), visited the beach (82% and 71%, respectively), went shopping (56% and 47%, respectively), and/or went swimming (63% and 41%, respectively).

Day Trippers and VFRs were the most likely to have visited a museum (54%) and 50%, respectively).

Question: Which of these activities did you, or will you, participate in while in the St. Pete/Clearwater area? (Select all that apply)
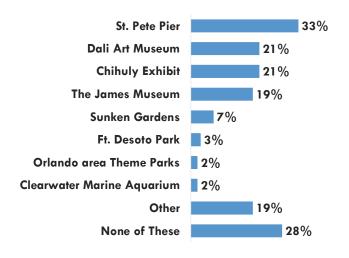
Base: All Respondents. 1,333 responses.

	Total	Hotel	VFR	Day Trip
Base Size	1,333	355	221	521
Dining in restaurants	75%	**91%**	**76%**	68%
Visit museums	47%	29%	**50%**	**54%**
Visit the beach	47%	**82%**	71%	28%
Shopping	40%	**56%**	47%	30%
Swimming	28%	**63%**	41%	10%
Visit friends or family	25%	11%	77%	27%
Bars/Nightlife	13%	36%	20%	3%
Other boating	12%	22%	13%	6%
Take a dining cruise	6%	11%	4%	3%
Attend or participate in a sporting event	5%	8%	5%	4%
Attend a festival or special event	5%	5%	12%	3%
Fishing	4%	6%	6%	3%
Guided tour	2%	3%	0%	2%
Visit breweries and/or distilleries	2%	3%	7%	1%
Jet skiing	2%	5%	3%	0%
Kayaking/Canoeing	2%	1%	1%	2%
Parasailing	1%	1%	2%	1%
Shelling	1%	2%	0%	0%
Photography	1%	3%	1%	0%
Golf	1%	1%	1%	0%
Biking	1%	1%	3%	0%
Bird watching	0%	1%	0%	0%
Baseball Spring Training	0%	0%	0%	0%
Sailing	0%	1%	1%	0%
Paddle boarding	0%	0%	0%	0%

ATTRACTIONS VISITED

The top attractions in Q3 2023 were the St. Pete Pier (33%), the Dali Museum (21%), the Chihuly Exhibit (21%), and the James Museum (19%). VFRs were the most likely to have visited the St. Pete Pier (41%) and the Dali Art Museum (24%).

Figure 18: Attractions Visited

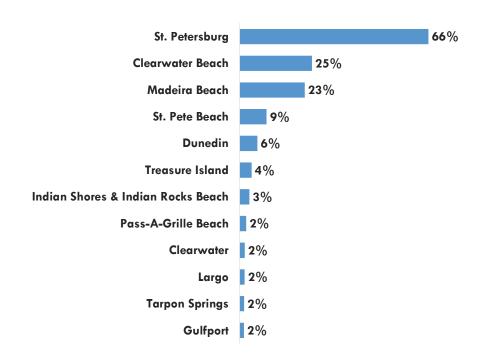| Attraction	Percentage
St. Pete Pier	33%
Dali Art Museum	21%
Chihuly Exhibit	21%
The James Museum	19%
Sunken Gardens	7%
Ft. Desoto Park	3%
Orlando area Theme Parks	2%
Clearwater Marine Aquarium	2%
Other	19%
None of These	28%

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	355	221	521
St. Pete Pier	33%	**41%**	31%
Dali Art Museum	17%	**24%**	22%
Chihuly Exhibit	17%	23%	23%
The James Museum	7%	22%	24%
Sunken Gardens	7%	12%	5%
Ft. Desoto Park	2%	8%	2%
Orlando area Theme Parks	5%	1%	1%
Clearwater Marine Aquarium	5%	3%	1%
Other	22%	28%	16%
None of These	44%	19%	25%

Question: Which of these attractions did you (or will you) visit while on this trip? (Select all that apply) Base: All Respondents. 1,333 responses.

COMMUNITIES VISITED

The most common St. Pete/Clearwater communities visited were St. Petersburg (66%, up from 44% in Q3 2022), Clearwater Beach (25%, down from 29% in Q3 2022) and Madeira Beach (23%, down from 48% in Q3, 2023).

Figure 19: Top Communities Visited

Community	Percentage
St. Petersburg	66%
Clearwater Beach	25%
Madeira Beach	23%
St. Pete Beach	9%
Dunedin	6%
Treasure Island	4%
Indian Shores & Indian Rocks Beach	3%
Pass-A-Grille Beach	2%
Clearwater	2%
Largo	2%
Tarpon Springs	2%
Gulfport	2%

Question: Which of the following communities in the St. Pete/Clearwater area did you visit? (Show list. Select all that apply) Base: All Respondents. 1,333 responses.

COMMUNITIES VISITED

Day Trippers and VFRs were the most likely to have visited St. Petersburg (74% and 69%, respectively).

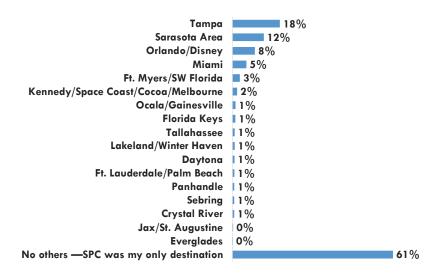Hotel Guests were the most likely to have visited Clearwater Beach (44%) and St. Pete Beach (25%).

	Total	Hotel	VFR	Day Trip
Base Size	1,333	355	221	521
St. Petersburg	66%	46%	**69%**	**74%**
Clearwater Beach	25%	**44%**	23%	18%
Madeira Beach	23%	29%	29%	16%
St. Pete Beach	9%	**25%**	17%	2%
Dunedin	6%	11%	16%	4%
Treasure Island	4%	12%	4%	0%
Indian Shores & Indian Rocks Beach	3%	4%	11%	1%
Pass-A-Grille Beach	2%	2%	7%	1%
Clearwater	2%	4%	4%	0%
Largo	2%	1%	11%	1%
Tarpon Springs	2%	2%	6%	1%
Gulfport	2%	1%	4%	1%
Seminole	1%	0%	6%	1%
Palm Harbor	1%	0%	4%	1%
North Redington Beach/Redington Shores	1%	2%	3%	0%
Safety Harbor	1%	1%	5%	0%
Tierra Verde	1%	0%	1%	0%
Pinellas Park	0%	0%	2%	0%
Oldsmar	0%	0%	0%	0%

Question: Which of the following communities in the St. Pete/Clearwater area did you visit? (Show list. Select all that apply) Base: All Respondents. 1,333 responses.

OTHER DESTINATIONS VISITED

For almost two-thirds of visitors, St. Pete/Clearwater was the only destination visited during their trip to the area (61%, up from 36% in Q3 2022%). Visitors were most likely to have visited Tampa (18%, down from 34% in Q3 2022), the Sarasota area (12%), and/or Orlando/Disney (8%).

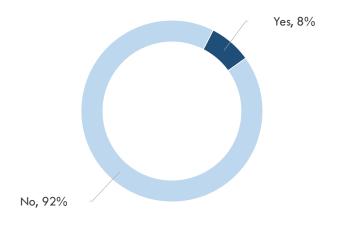**Figure 20: Other Destinations Visited on St. Pete/Clearwater Trip**

Destination	%
Tampa	18%
Sarasota Area	12%
Orlando/Disney	8%
Miami	5%
Ft. Myers/SW Florida	3%
Kennedy/Space Coast/Cocoa/Melbourne	2%
Ocala/Gainesville	1%
Florida Keys	1%
Tallahassee	1%
Lakeland/Winter Haven	1%
Daytona	1%
Ft. Lauderdale/Palm Beach	1%
Panhandle	1%
Sebring	1%
Crystal River	1%
Jax/St. Augustine	0%
Everglades	0%
No others —SPC was my only destination	61%

Question: Which of these other destinations did you visit while on this trip? (Select all that apply) Base: All Respondents. 1,333 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	355	221	521
Tampa	9%	8%	23%
Sarasota Area	5%	7%	16%
Orlando/Disney	11%	3%	8%
Miami	8%	3%	5%
Ft. Myers/SW Florida	6%	0%	2%
Kennedy/Space Coast/Cocoa/Melbourne	2%	0%	2%
Ocala/Gainesville	0%	2%	1%
Florida Keys	2%	0%	1%
Tallahassee	1%	2%	0%
Lakeland/Winter Haven	1%	0%	1%
Daytona	0%	0%	1%
Ft. Lauderdale/Palm Beach	2%	0%	0%
Panhandle	1%	1%	0%
Sebring	0%	0%	1%
Crystal River	1%	0%	1%
Jax/St. Augustine	1%	0%	0%
Everglades	1%	0%	0%
No others	71%	78%	54%

FIRST-TIME FLORIDA VISITOR

Less than one-in-ten visitors were in the Florida for the first time (8%, up from 3% in Q3 2022).

Figure 21: First-Time Visitors to Florida

Yes, 8%

No, 92%

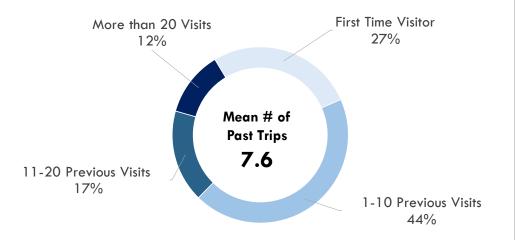**Detail by Traveler Segment**

	Hotel	VFR	Day Trip
Base Size	355	221	521
Yes	13%	8%	6%
No	87%	92%	94%

Question: Is this your first visit to Florida? Base: All Respondents 1,333 responses.

PREVIOUS VISITS TO ST. PETE/CLEARWATER

More than one quarter of visitors were in Pinellas County for the first time (27%, up from 12% in Q3 2022). Among those who had visited the destination prior, they had taken an average of more than 7 trips to the area (compared to 9 previous trips in Q3 2022).

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

More than 20 Visits
12%

First Time Visitor
27%

Mean # of Past Trips
7.6

11-20 Previous Visits
17%

1-10 Previous Visits
44%

Detail by Traveler Segment

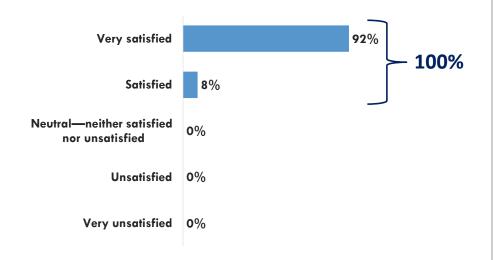|	Hotel	VFR	Day Trip
Base Size	311	202	502
First-time Visitors	35%	12%	26%
1-10 Previous Visits	49%	65%	39%
11-20 Previous Visits	12%	16%	19%
More than 20 Previous Visits	4%	8%	16%
Mean	**7.6**	**7.6**	**7.9**

Question: Prior to this visit, how many times have you been to the St. Pete/Clearwater area?
Base: All Respondents. 1,232 responses.

Visitor Satisfaction

OVERALL SATISFACTION

All St. Pete/Clearwater visitors were either very satisfied (92%) or satisfied (8%) with their experience in the destination.
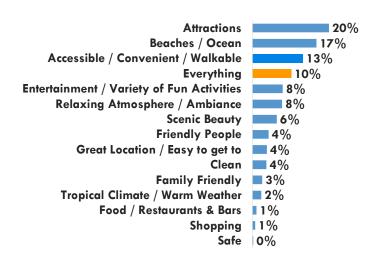
Figure 23: Overall Satisfaction

Category	Value
Very satisfied	92%
Satisfied	8%
Neutral—neither satisfied nor unsatisfied	0%
Unsatisfied	0%
Very unsatisfied	0%

100%

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	355	221	521
Very satisfied	97%	91%	90%
Satisfied	3%	9%	10%
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. 1,333 responses.

MOST LIKED ASPECTS OF ST. PETE/CLEARWATER

St. Pete/Clearwater attractions were the most liked aspect of the area (20%), followed by beaches (17%), accessibility/convenience/walkability (13%), and/or everything (10%).

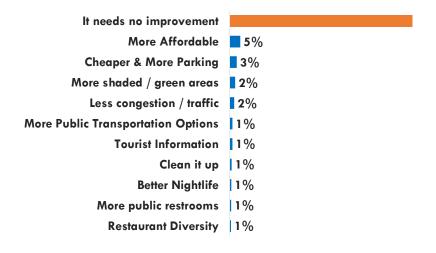**Figure 24: Most Liked Aspects of St. Pete/Clearwater (Unaided)**

Aspect	Percentage
Attractions	20%
Beaches / Ocean	17%
Accessible / Convenient / Walkable	13%
Everything	10%
Entertainment / Variety of Fun Activities	8%
Relaxing Atmosphere / Ambiance	8%
Scenic Beauty	6%
Friendly People	4%
Great Location / Easy to get to	4%
Clean	4%
Family Friendly	3%
Tropical Climate / Warm Weather	2%
Food / Restaurants & Bars	1%
Shopping	1%
Safe	0%

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	355	221	521
Attractions	6%	8%	28%
Beaches / Ocean	37%	20%	8%
Accessible / Convenient / Walkable	13%	6%	15%
Everything	13%	10%	7%
Entertainment / Variety of Fun Activities	2%	5%	10%
Relaxing Atmosphere / Ambiance	12%	17%	5%
Scenic Beauty	4%	6%	7%
Friendly People	2%	10%	5%
Great Location / Easy to get to	1%	0%	5%
Clean	2%	3%	4%
Family Friendly	4%	6%	2%
Tropical Climate / Warm Weather	2%	4%	2%
Food / Restaurants & Bars	1%	2%	1%
Shopping	0%	1%	1%
Safe	1%	1%	0%

Question: What do you like most about the St. Pete/Clearwater area?
Base: All Respondents. 1,333 responses.

ATTRACTIONS/ SERVICES DESIRED

Over eight-in-ten visitors said that St. Pete/Clearwater needs no improvement when asked what services or additional attractions would enhance their experience in the destination (82%). Of the specific suggestions provided, visitors wished the destination was more affordable (5%) and had cheaper/more parking (3%).

Figure 25: Additional Attractions or Services (Unaided)

Category	Value
It needs no improvement	
More Affordable	5%
Cheaper & More Parking	3%
More shaded / green areas	2%
Less congestion / traffic	2%
More Public Transportation Options	1%
Tourist Information	1%
Clean it up	1%
Better Nightlife	1%
More public restrooms	1%
Restaurant Diversity	1%

Detail by Traveler Segment

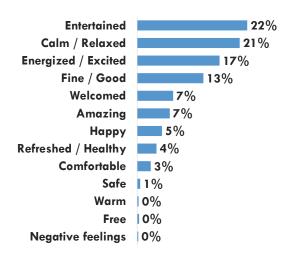|	Hotel	VFR	Day Trip
Base Size	355	221	521
It needs no improvement	**81%**	**86%**	**83%**
More Affordable	5%	4%	4%
Cheaper & More Parking	3%	1%	3%
More shaded / green areas	1%	2%	3%
Less congestion / traffic	1%	2%	2%
More Public Transportation Options	1%	2%	1%
Tourist Information	2%	1%	1%
Clean it up	1%	0%	1%
Better Nightlife	2%	0%	0%
More public restrooms	0%	0%	1%
Restaurant Diversity	0%	0%	1%

Question: In your opinion, what services or additional attractions would most enhance your experience in the St. Pete/Clearwater Area? Base: All Respondents. 1,333 responses.

EMOTIONS WHILE IN ST. PETE/CLEARWATER

St. Pete/Clearwater visitors felt entertained (22%, up from 2% in Q3 2022) and calm & relaxed (21%, down from 86% in Q3 2022).
Hotel Guests were the most likely to be calm and relaxed (35%).

Figure 26: Feelings in St. Pete/Clearwater Area (Unaided)

Feeling	%
Entertained	22%
Calm / Relaxed	21%
Energized / Excited	17%
Fine / Good	13%
Welcomed	7%
Amazing	7%
Happy	5%
Refreshed / Healthy	4%
Comfortable	3%
Safe	1%
Warm	0%
Free	0%
Negative feelings	0%

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	355	221	521
Entertained	10%	15%	29%
Calm / Relaxed	**35%**	28%	13%
Energized / Excited	19%	10%	17%
Fine / Good	7%	9%	17%
Welcomed	4%	19%	7%
Amazing	8%	5%	6%
Happy	4%	8%	5%
Refreshed / Healthy	9%	3%	2%
Comfortable	4%	2%	2%
Safe	1%	0%	1%
Warm	0%	0%	0%
Free	0%	0%	0%
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. 1,333 responses.

LIKELIHOOD TO RECOMMEND

Visitors are very likely to recommend St. Pete/Clearwater area as a travel destination to others. Visitors rated their likelihood to recommend the destination a 9.5 out of 10.

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

9.5/10

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	355	221	521
10—Certain to Recommend	58%	49%	52%
9	41%	46%	45%
8	1%	5%	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 Recommend	0%	0%	0%
Mean Score	**9.6**	**9.4**	**9.5**

Question: How likely are you to recommend the St. Pete/Clearwater area as a place to visit to other travelers? Please use a 10-point scale where 1 represents "Definitely will NOT recommend" and 10 represents "Certain to recommend." Base: All Respondents. 1,333 responses.

LIKELIHOOD TO RETURN

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

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

9.3/10

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	355	221	521
10—Certain to Return	58%	56%	47%
9	29%	39%	41%
8	8%	3%	9%
7	4%	1%	3%
6	1%	1%	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	**9.4**	**9.5**	**9.3**

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."
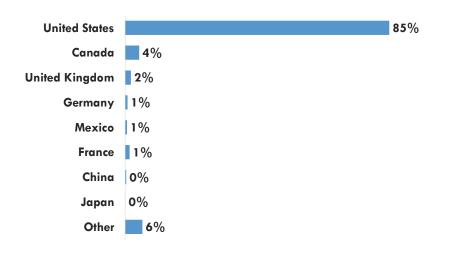Base: All Respondents. 1,333 responses.

Q3 2023
Point of Origin &
Demographic Profile

COUNTRY OF ORIGIN

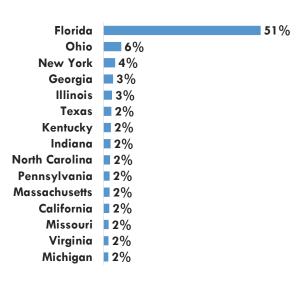**The St. Pete/Clearwater area saw an increase in international visitors in Q3 2023 (15%, up from 3% in Q3 2022).**

Figure 29: Country of Origin

Country	Percentage
United States	85%
Canada	4%
United Kingdom	2%
Germany	1%
Mexico	1%
France	1%
China	0%
Japan	0%
Other	6%

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	355	221	521
United States	87%	93%	83%
Canada	1%	2%	6%
United Kingdom	3%	0%	1%
Germany	1%	0%	1%
Mexico	0%	0%	1%
France	2%	0%	2%
China	0%	0%	1%
Japan	0%	0%	0%
Other	6%	5%	6%

Question: In what country do you reside? Base: All Respondents. 1,333 responses.

TOP STATES OF ORIGIN

Approximately half of all domestic visitors in Q3 2023 were Florida residents (51%, up from 35% in Q3 2022). Ohio (6%), New York (4%), Georgia (3%), and Illinois (3%) were the most common out-of-state markets. Day Trippers were again the most likely to be Florida residents (65%).

Figure 30: State of Origin

Florida	51%
Ohio	6%
New York	4%
Georgia	3%
Illinois	3%
Texas	2%
Kentucky	2%
Indiana	2%
North Carolina	2%
Pennsylvania	2%
Massachusetts	2%
California	2%
Missouri	2%
Virginia	2%
Michigan	2%

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	307	200	465
Florida	32%	15%	65%
Ohio	8%	5%	4%
New York	8%	3%	3%
Georgia	3%	5%	3%
Illinois	3%	5%	1%
Texas	2%	6%	2%
Kentucky	4%	4%	1%
Indiana	4%	2%	1%
North Carolina	4%	4%	1%
Pennsylvania	2%	4%	1%
Massachusetts	1%	4%	2%
California	1%	4%	2%
Missouri	3%	5%	1%
Virginia	3%	2%	1%
Michigan	3%	5%	0%

Question: What is your zip/postal code? Base: Domestic respondents. 1,181 responses.

MSA OF ORIGIN

The top Florida visitor markets were the Tampa area (22%), Sarasota/Bradenton (9%), and Orlando (5%). The top out-of-state markets were Atlanta (3%), Chicago (3%), New York (2%), and Cincinnati (2%).
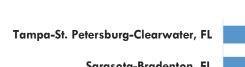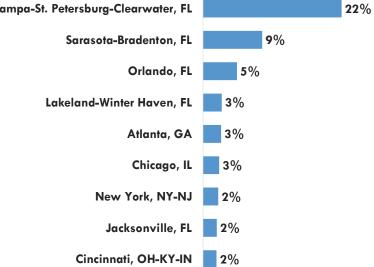
Figure 31: MSA

Tampa-St. Petersburg-Clearwater, FL — 22%
Sarasota-Bradenton, FL — 9%
Orlando, FL — 5%
Lakeland-Winter Haven, FL — 3%
Atlanta, GA — 3%
Chicago, IL — 3%
New York, NY-NJ — 2%
Jacksonville, FL — 2%
Cincinnati, OH-KY-IN — 2%

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Base Size	276	180	446
Tampa-St. Petersburg-Clearwater, FL	7%	2%	31%
Sarasota-Bradenton, FL	1%	1%	14%
Orlando, FL	4%	0%	7%
Lakeland-Winter Haven, FL	2%	1%	4%
Atlanta, GA	2%	3%	3%
Chicago, IL	4%	6%	2%
New York, NY-NJ	6%	2%	2%
Jacksonville, FL	2%	1%	2%
Cincinnati, OH-KY-IN	2%	4%	2%

Question: What is your zip/postal code? Base: Domestic respondents. 1,086 responses.

DEMOGRAPHICS

The demographic profile for all visitors in Q3 2023 are as follows:

Average Age

50.6 years old

Gender*

Female: 54%

Male: 46%

Household Income

$83,066

Marital Status

Single: 20%

Married/partnered: 69%

Children under 15%

Ethnicity

Caucasian – 84%

Latino / Hispanic– 8%

Black/African-American – 5%

Orientation

Heterosexual – 94%

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. It should be noted that female visitors have been statistically more likely than male visitors to complete the survey in-market.

DEMOGRAPHICS BY VISITOR SEGMENT

The demographic profile by place of stay segments in Q3 2023 are as follows:

	Hotel	VFR	Day Trip
Female	54%	56%	53%
Male	46%	44%	47%
Mean Age	46.3	51.9	52.5
Single	16%	27%	22%
Married	77%	57%	67%
Has Children	21%	11%	13%
Annual Household Income	$87,165	$85,068	$80,918
Caucasian	84%	88%	83%
Latino / Hispanic	6%	5%	9%
Black / African-American	5%	5%	4%
Asian/Pacific Islander	4%	2%	0%
American Indian/Alaska Native	0%	0%	1%
Other	0%	0%	0%
Heterosexual	96%	89%	94%
LGBTQ	1%	1%	1%