ST.PETE CLEARWATER

Visit St. Pete/Clearwater

VISITOR PROFILE STUDY

Report of Findings

Q4 2022

Research prepared for Visit St. Pete/Clearwater by:

Destination Analysts

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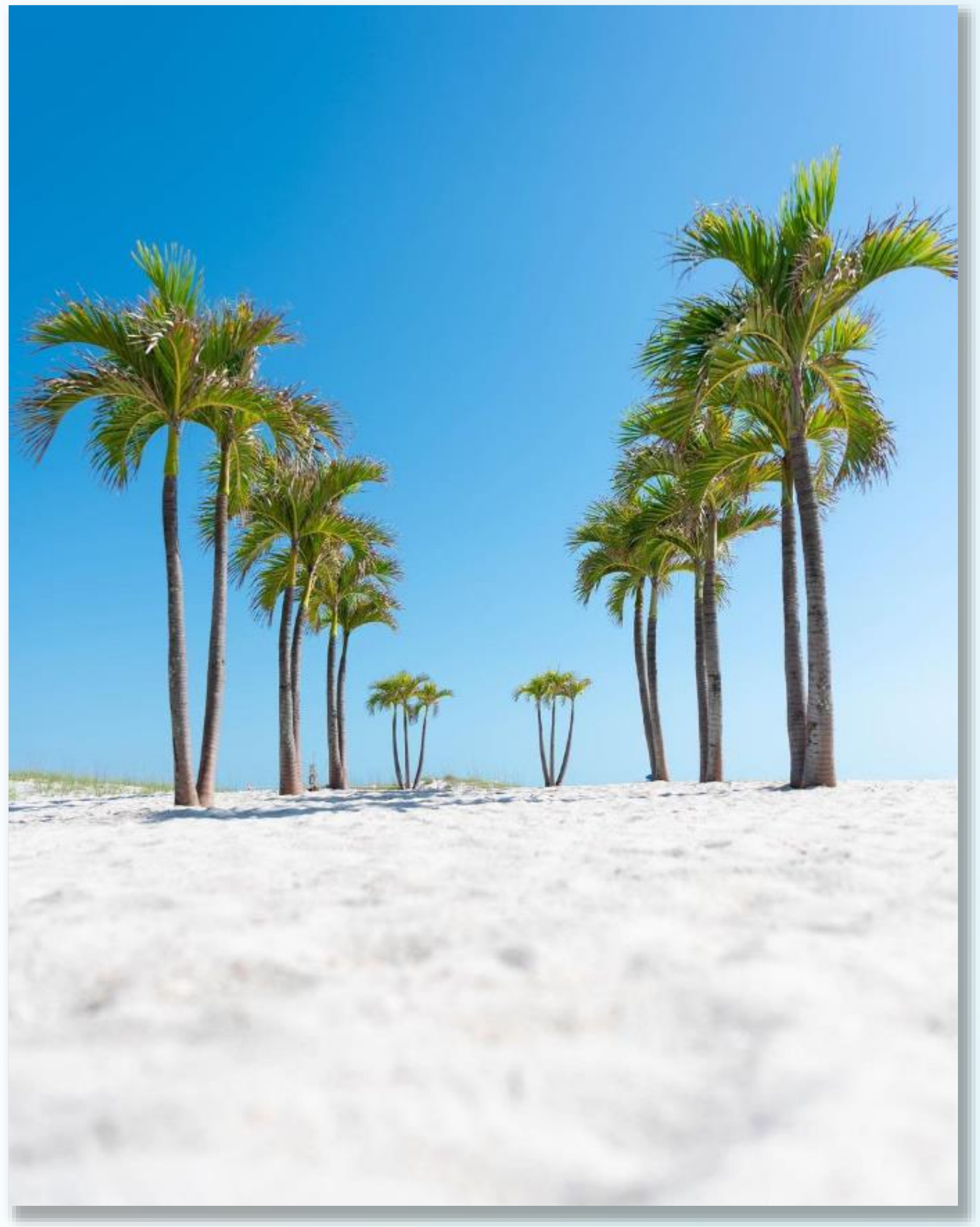
Research Overview & Methodology

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 October 2022 - December 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, 1,391 completed surveys from Pinellas County visitors were collected.



Above: *Image 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:

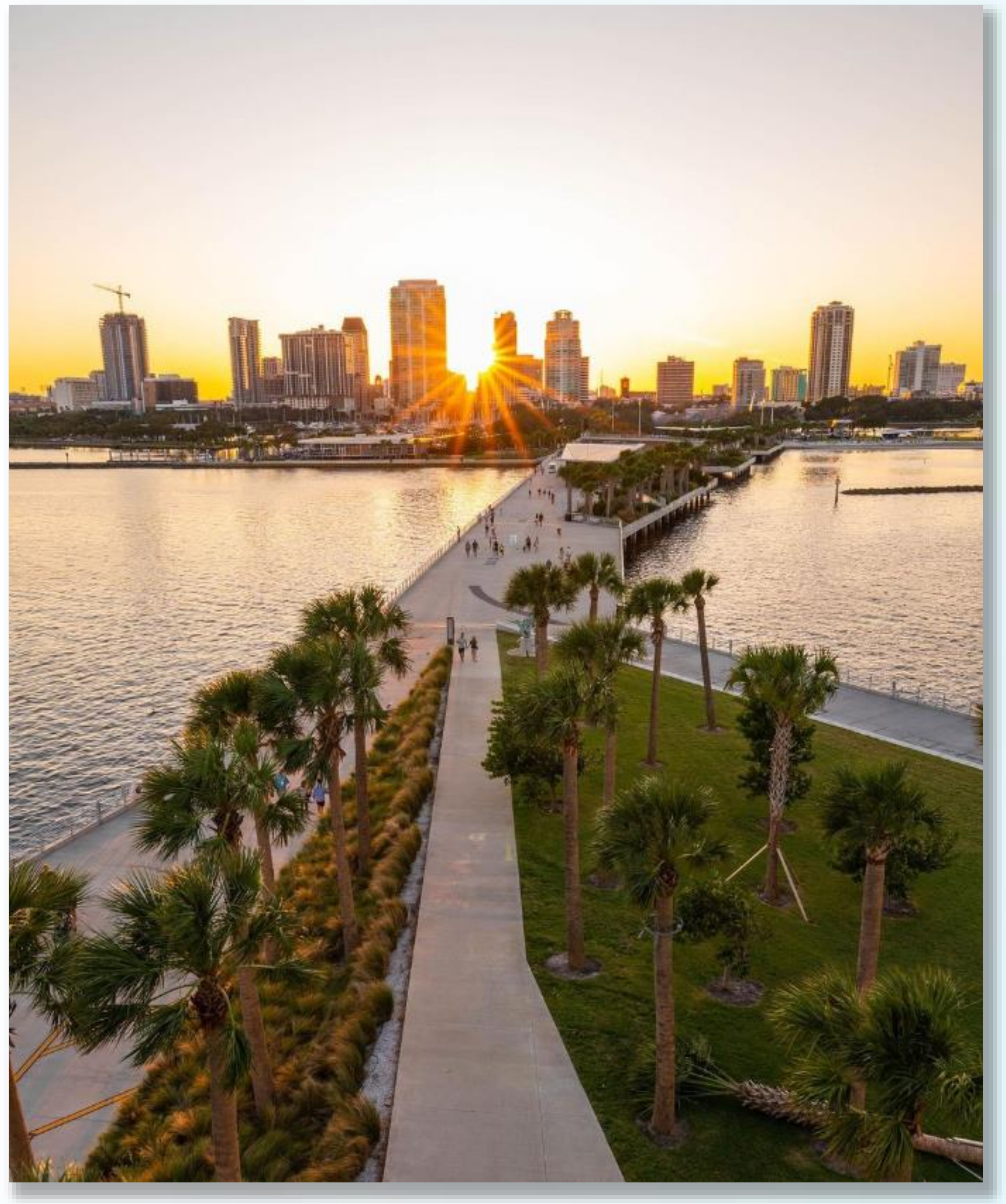
- Chihuly Collection
- Clearwater Beach
- Clearwater Marine Aquarium
- Dunedin
- Hyatt Place
- John's Pass Village & Boardwalk
- Museum of Fine Arts
- Pier 60
- Salvador Dali Museum
- Sandpearl Resort
- Shephard's Beach Resort
- St. Pete-Clearwater International Airport
- St. Pete Pier
- Sunken Gardens
- 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: *Image of the St. Pete/Clearwater area.*

Q4 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 – Q4 2022

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

	October 2022	November 2022	December 2022	Q4 (October - December 2022)
Visitors to Pinellas County	1,295,539	1,106,242	1,032,283	3,434,064
Direct Visitor Spending in Pinellas County	$558,580,016	$473,584,350	$465,794,835	$1,497,959,201
Total Economic Impact of Tourism to Pinellas County	$926,870,525	$786,237,981	$782,059,135	$2,495,167,641
Tax Revenues Generated for Pinellas County	$33,956,628	$29,542,787	$30,046,931	$93,546,346
Hotel Room Nights	578,605	513,800	513,957	1,606,362
Visitor Industry Payroll	$294,109,619	$246,687,997	$245,639,931	$786,437,547
Jobs Supported	9,052	7,561	7,516	24,130

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 October 2022 – December 2022.

- **Visitors to Pinellas County** - Pinellas County had a total of 3.4 million visitors between October 2022 – December 2022. The largest segment of Pinellas County's visitor volume this quarter is day trip visitors from outside the surrounding region, comprising 1.2 million visitors, or 36 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 October 2022 – December 2022. The largest share of this spending was generated by hotel guests who stayed overnight in commercial lodging. These visitors were responsible for $670 million in visitor spending, or 46 percent of the total.

- **Total Economic Impact of Tourism to Pinellas County** – Tourism generated a total of $2.5 billion in economic impact for Pinellas County during October 2022 – December 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

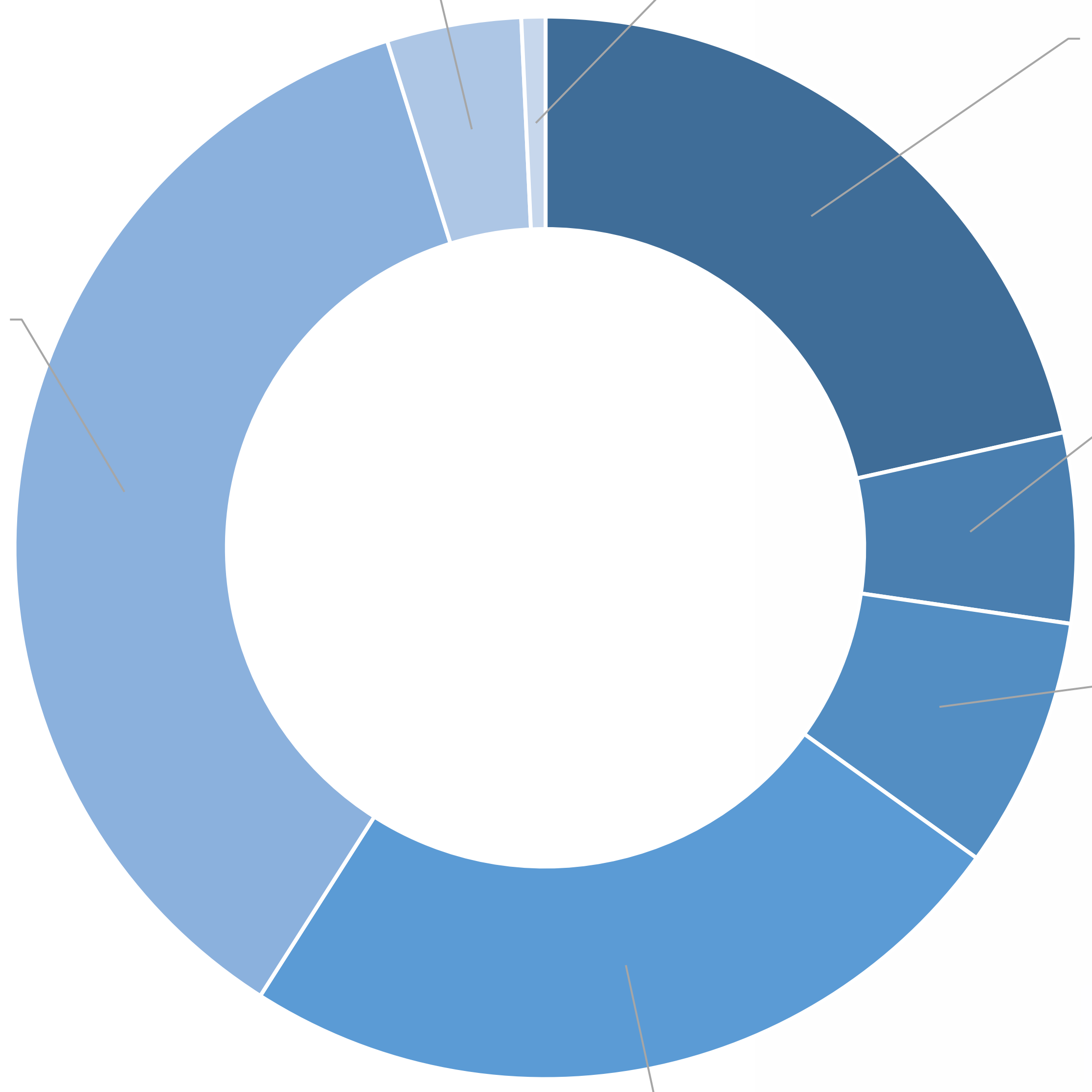
- **Tax Revenues Generated for Pinellas County** – Pinellas County's tourism industry generated $93.5 million in tax revenues for governmental entities from October 2022 – December 2022. Taxes directly generated by the visitor industry include revenues from the transient occupancy tax (hotel tax), sales taxes and property taxes paid on lodging facilities.

- **Hotel Room Nights** – Between October 2022 – December 2022, an estimated 1.61 million hotel room nights were generated in Pinellas County by visitors.

- **Visitor Industry Payroll and Jobs supported** – From October 2022 – December 2022 the Pinellas County tourism industry had an estimated total combined payroll of $786 million. This is estimated to have supported 24,130 jobs county-wide.

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

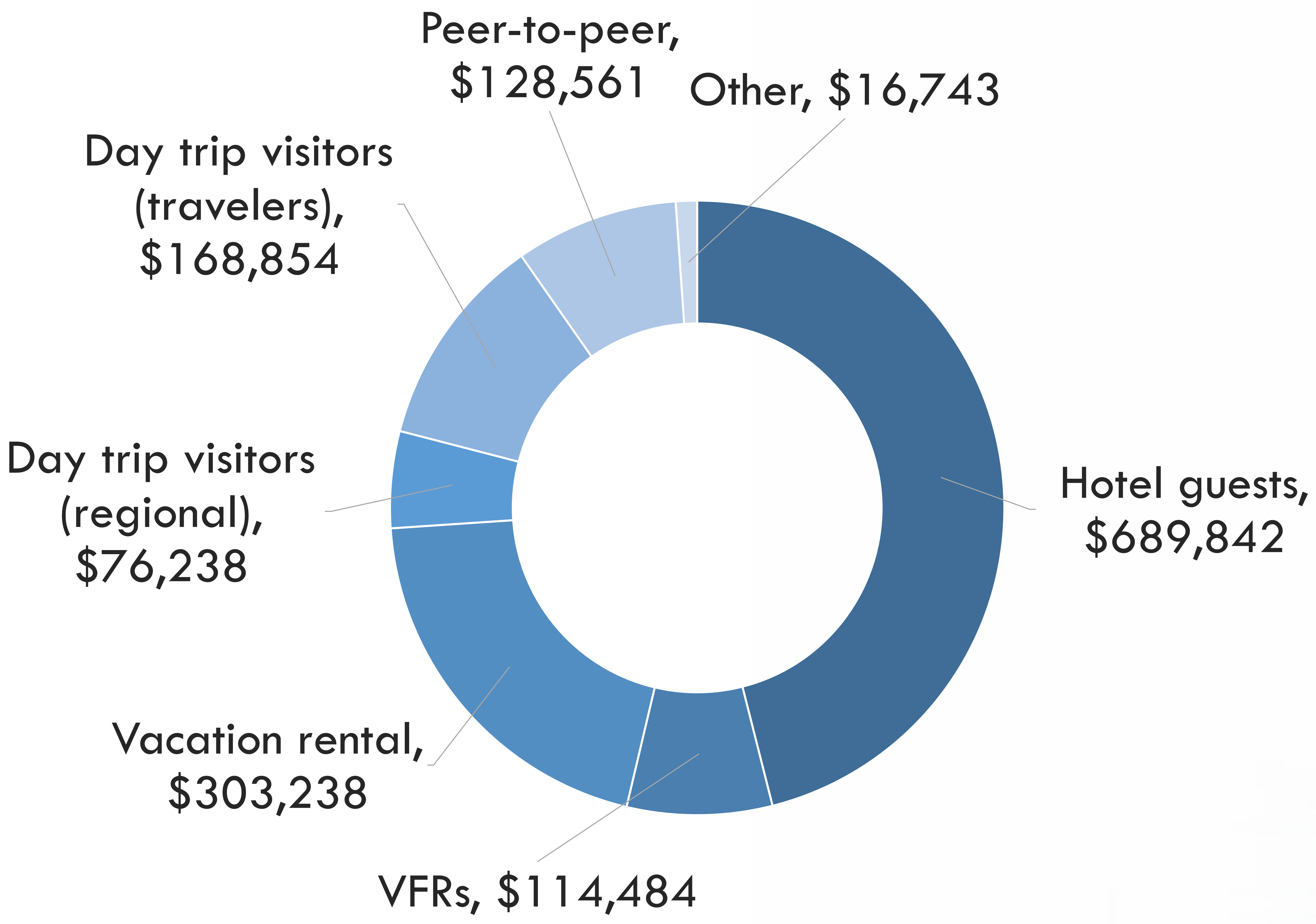
VISITORS TO PINELLAS COUNTY



Visitors to Pinellas County, by type of visitor

Hotel guests	738,655
VFRs	198,346
Vacation rental	262,363
Day trip visitors (regional)	827,641
Day trip visitors (travelers)	1,241,461
Peer-to-peer	140,473
Other	25,125
TOTAL VISITORS	**3,434,064**

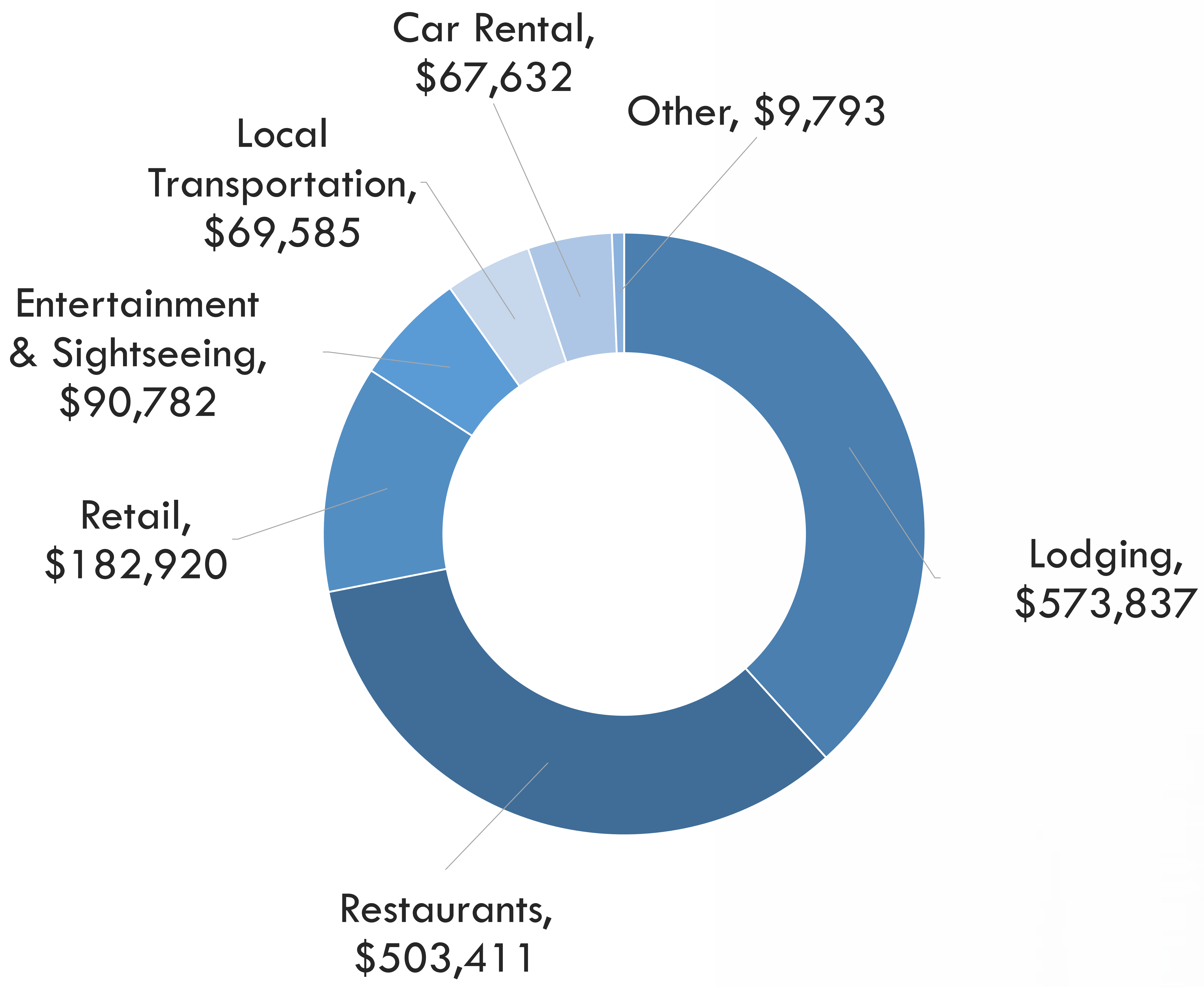
Direct Visitor Spending: By Type of Visitor



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

Hotel guests	$689,842
VFRs	$114,484
Vacation rental	$303,238
Day trip visitors (regional)	$76,238
Day trip visitors (travelers)	$168,854
Peer-to-peer	$128,561
Other	$16,743
TOTAL DIRECT VISITOR SPENDING	**$1,497,959**

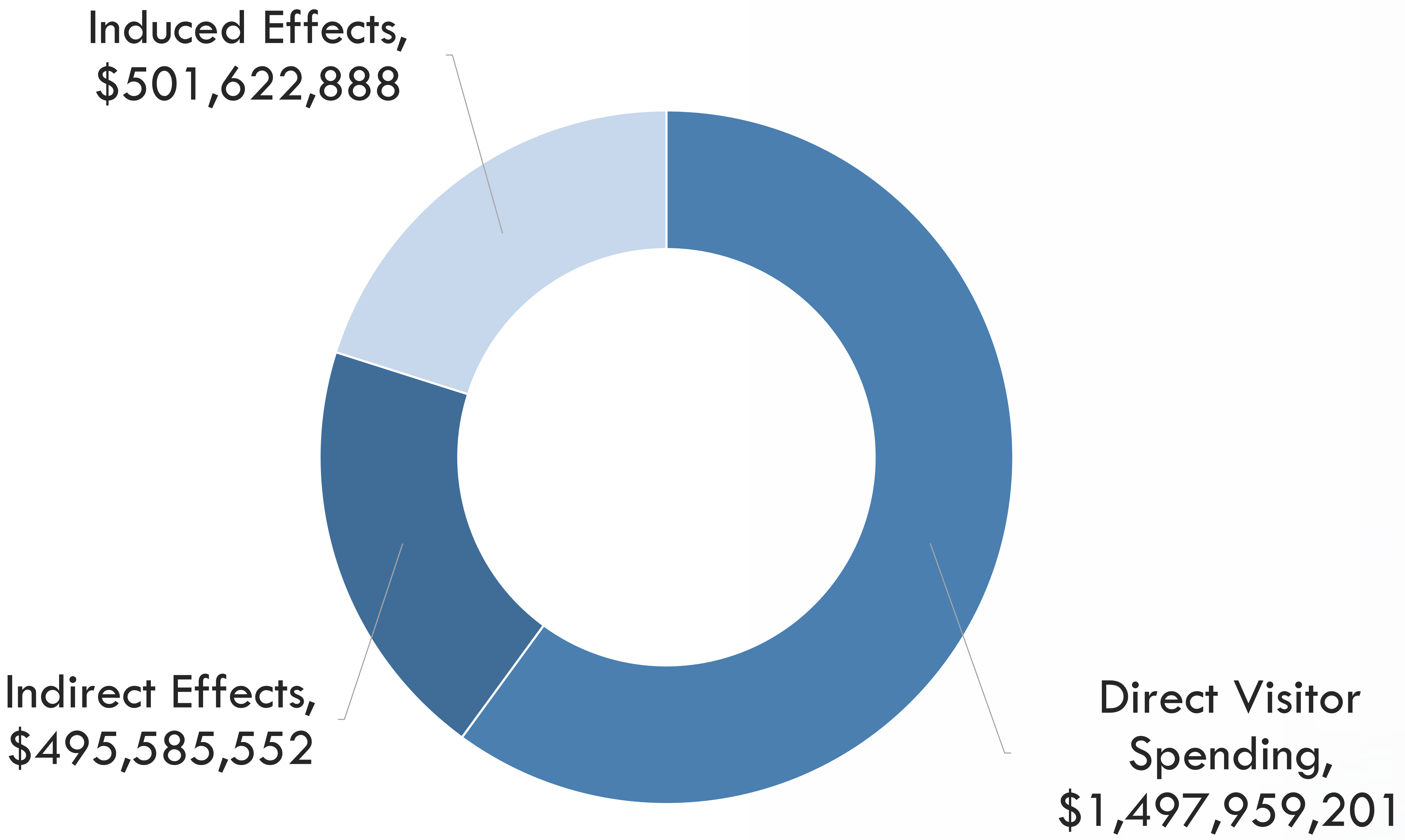
Direct Visitor Spending: By Type of Spending



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

Lodging	$573,837
Restaurants	$503,411
Retail	$182,920
Entertainment & Sightseeing	$90,782
Local Transportation	$69,585
Car Rental	$67,632
Other	$9,793
TOTAL DIRECT VISITOR SPENDING	**$1,497,959**

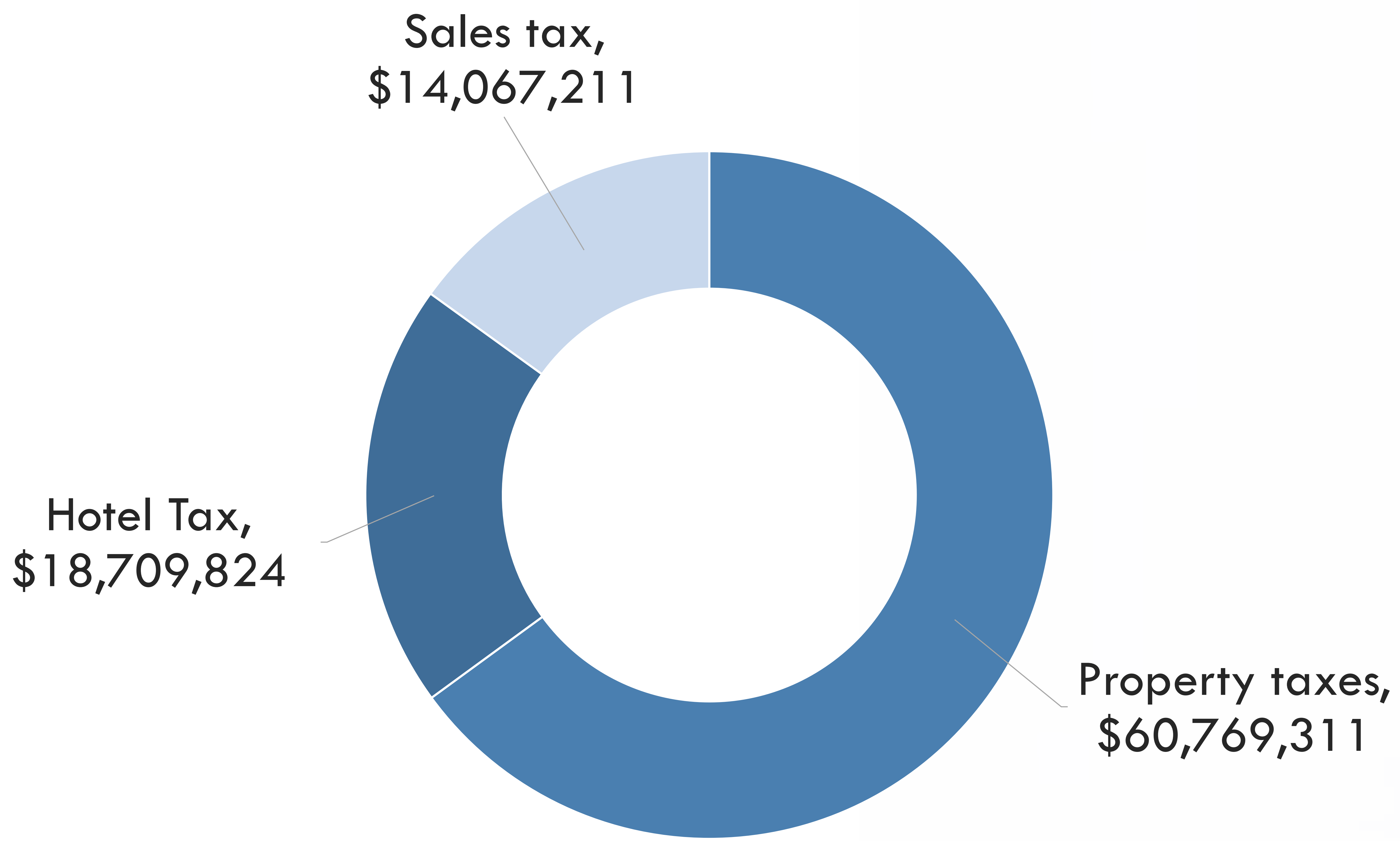
Total Economic Impact



Economic Impact Estimates, by type of effect

Direct Visitor Spending	$1,497,959,201
Indirect Effects	$495,585,552
Induced Effects	$501,622,888
TOTAL ECONOMIC IMPACT	**$2,495,167,641**

Tax Revenues Generated



Tax Revenues Generated, by type of tax

Property taxes	$60,769,311
Hotel Tax	$18,709,824
Sales tax	$14,067,211
TOTAL TAX REVENUES GENERATED	**$93,546,346**

Economic Impact YOY Comparison

The following presents the estimated economic impact of tourism to Pinellas County comparing Q4 2022 to past years.

- In this fourth quarter of 2022, Pinellas County saw increased visitor volume compared to Q4 2019 (up 6.0% from 2019). Visitor spending habits, softening from previous quarters but still strong, have shifted significantly with growth in spending exceeding growth in volume due to nationwide inflation as well as other impacts. Total economic impact in Q4 is estimated to be up 14.0% from 2021 and up 21.7% from 2019.

- Compared to past years, all spending and economic impact metrics show growth outpacing volume and hotel room nights. Although for the first time all year total occupied room nights is up 2.8% from 2019 levels, high average daily rates more than make up for the difference in hotel taxes generated. It is interesting to see hotel room nights up from last year even though volume is down – which is largely due to the return to normal levels of hotel guests seen this year compared to the record breaking number of day trippers seen during the pandemic.

Economic Impact YOY Comparison- Q4 2022 vs. Q4 2021

	Q4 2021 (October 2021 – December 2021)	Q4 2022 (October 2022 – December 2022)	% Change	Q4 2019 (October 2019 – December 2019)	Q4 2022 (October 2022 – December 2022)	% Change
Visitors to Pinellas County	3,703,723	3,434,064	-7.3%	3,241,183	3,434,064	6.0%
Direct Visitor Spending in Pinellas County	$1,373,274,327	$1,497,959,201	9.1%	$1,277,021,982	$1,497,959,201	17.3%
Total Economic Impact of Tourism to Pinellas County	$2,188,555,980	$2,495,167,641	14.0%	$2,050,386,150	$2,495,167,641	21.7%
Tax Revenues Generated for Pinellas County	$83,609,506	$93,546,346	11.9%	$74,800,204	$93,546,346	25.1%
Hotel Room Nights	1,542,600	1,606,362	4.1%	1,562,724	1,606,362	2.8%
Visitor Industry Payroll	$696,996,487	$786,437,547	12.8%	$641,362,775	$786,437,547	22.6%
Jobs Supported	21,900	24,130	10.2%	20,225	24,130	19.3%

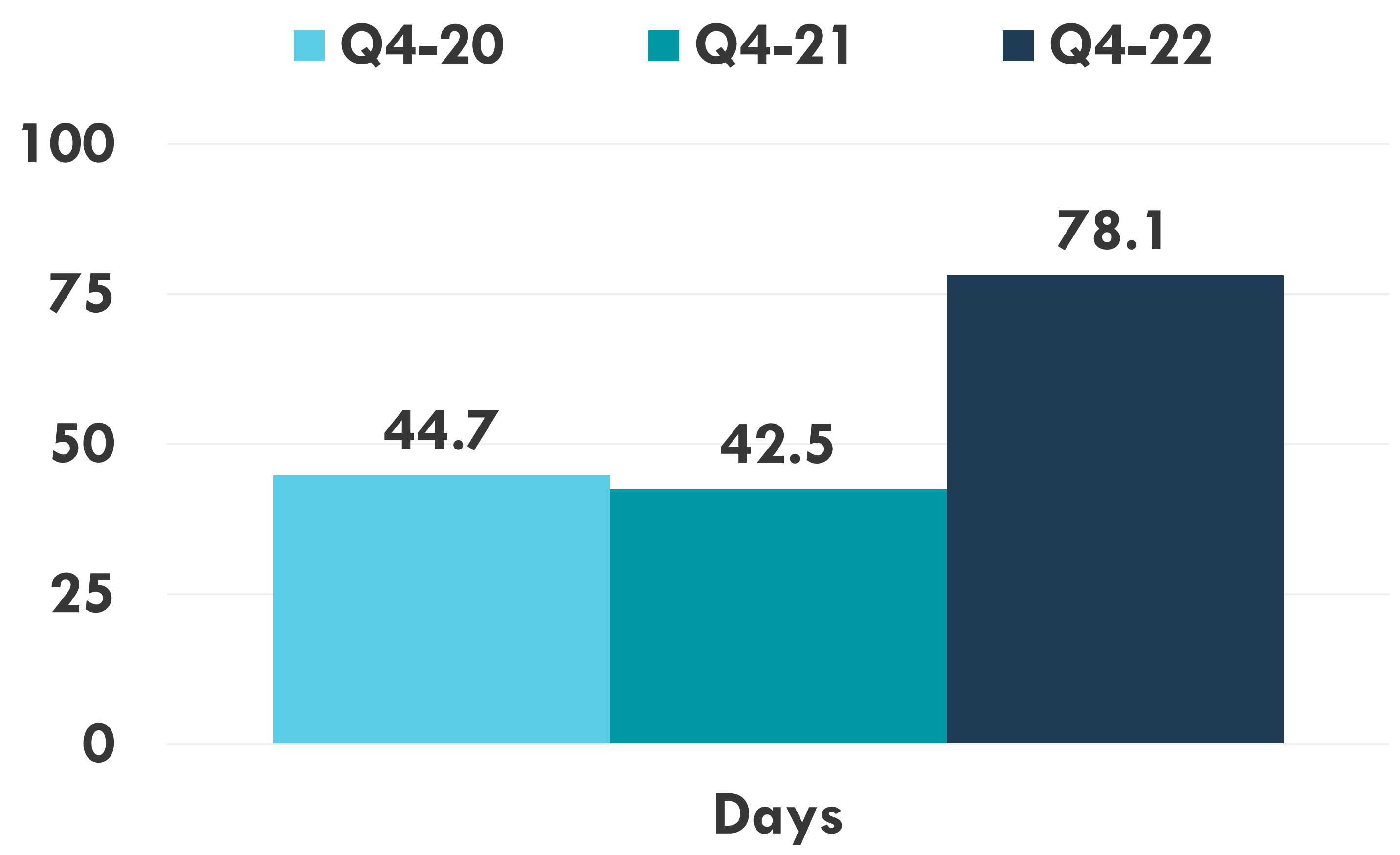
Q4 2022
St. Pete/Clearwater
Visitor Summary

Q4 2022 comparison to Q4 2021 and Q4 2020

VISIT ST. PETE/CLEARWATER *Q4 2022*

Destination Analysts

Average Time Between Decision to Visit & Arrival



Average Daily Spending-Total

$320.61
Q4-22

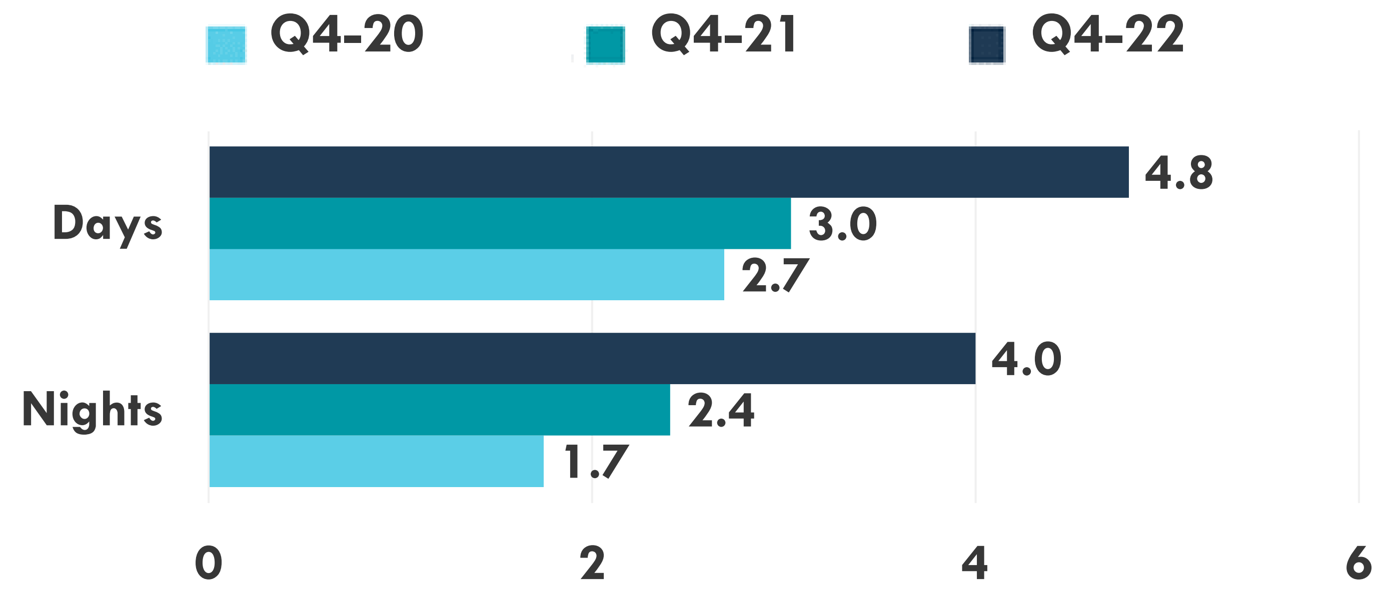
$260.01	$242.33
Q4-21	Q4-20

Travel Party Size

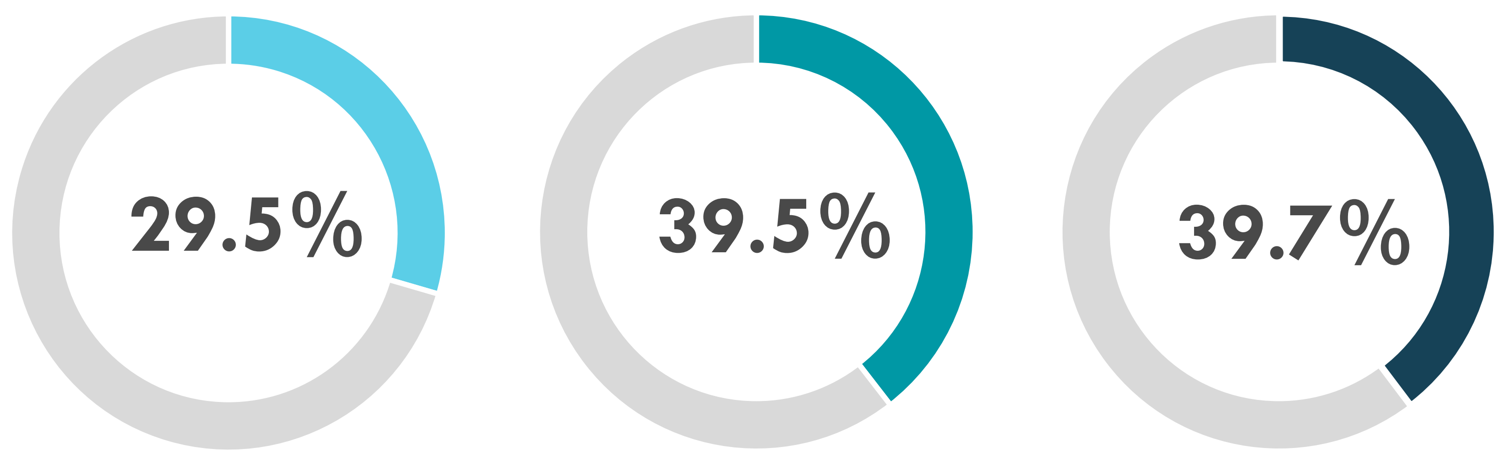
2.4
Q4-22

Q4-21	2.3
Q4-20	2.7

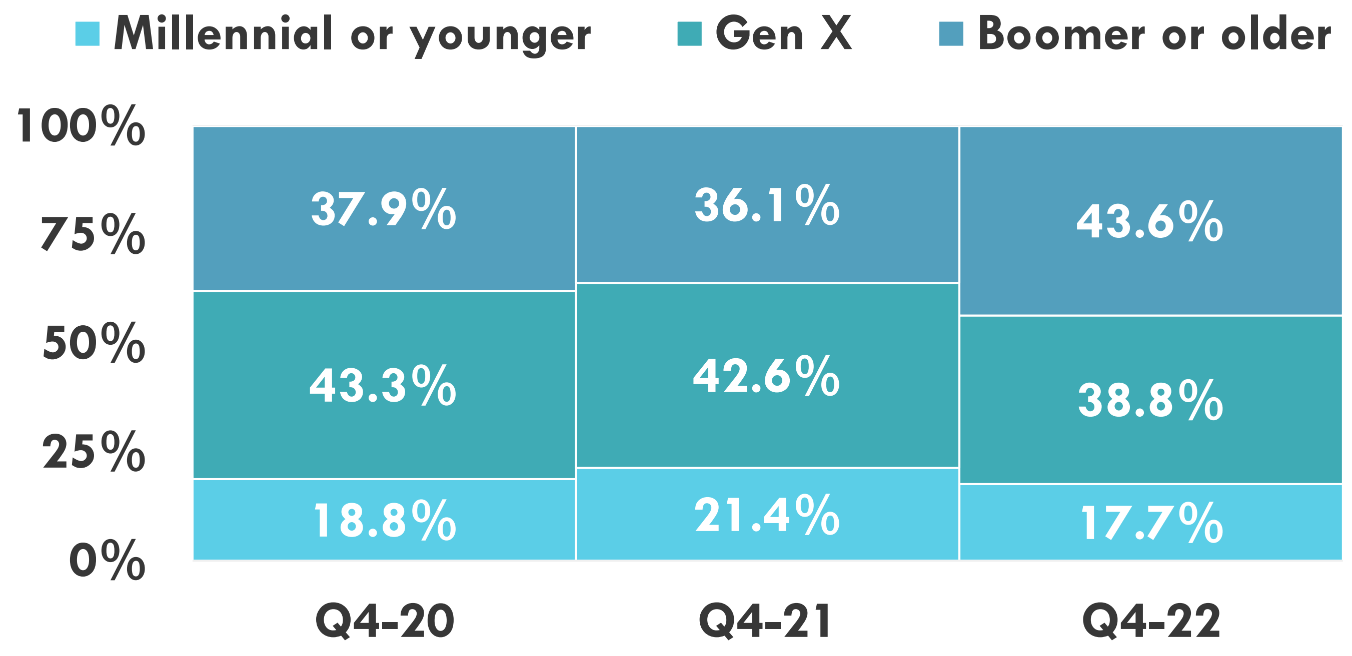
Average Days & Nights



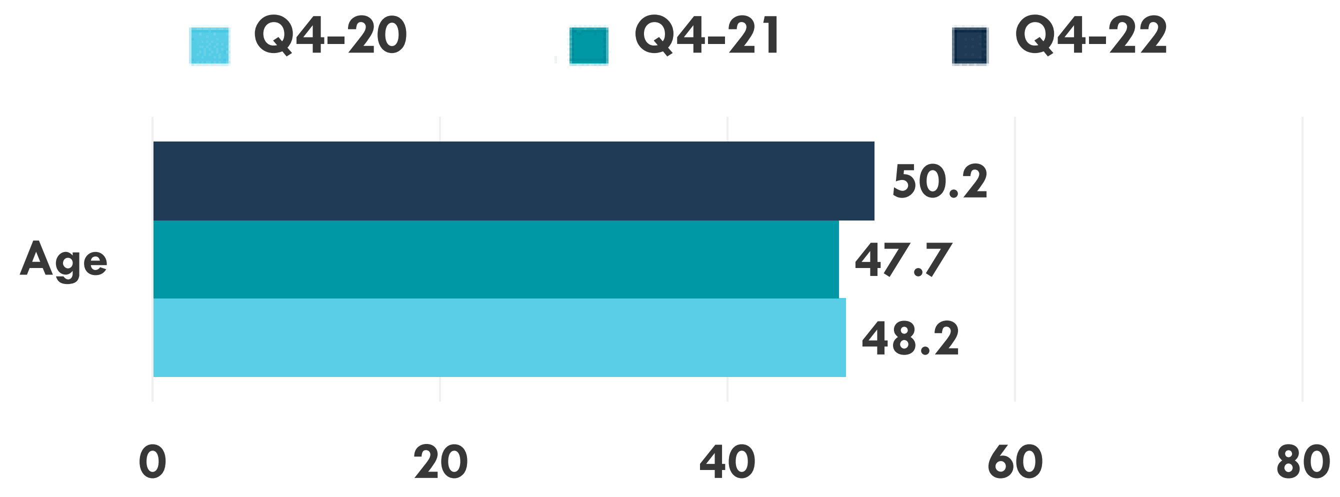
Percent Staying Overnight



Generations



Average Age



Average Income

$100,891
Q4-22

Q4-21	$105,097
Q4-20	$105,143

Q4 2022 Visitor Summaries by Traveler Segment

THE BEACH GO-ER

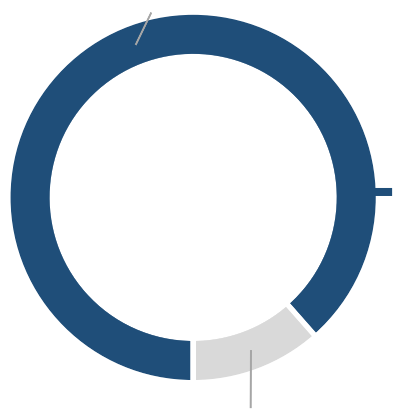
Q4 2022

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

Beaches that suit my tastes	100.0%
Weather	70.0%
Scenic beauty	47.1%
Attractions in the area	38.0%
Overall ambiance & atmosphere	36.8%
Restaurants, cuisine, food scene	29.3%
Friends or family in the area	24.7%

Domestic vs. International



POINT OF ORIGIN: TOP STATES

Florida	15.0%
Indiana	11.0%
Illinois	8.5%

Top Communities Visited

Madeira Beach	56.7%
St. Petersburg	46.6%
St. Pete Beach	35.3%
Clearwater Beach	31.8%
Treasure Island	28.2%

Top Activities

100.0%	95.1%	69.6%	34.5%
Visit the beach	Dining in restaurants	Shopping	Visit museums

Length of Stay

5.8 Days on Average

Travel Party Size

2.7 People

11.1% Traveled with Children

Daily Spending

$149.40

Per Person

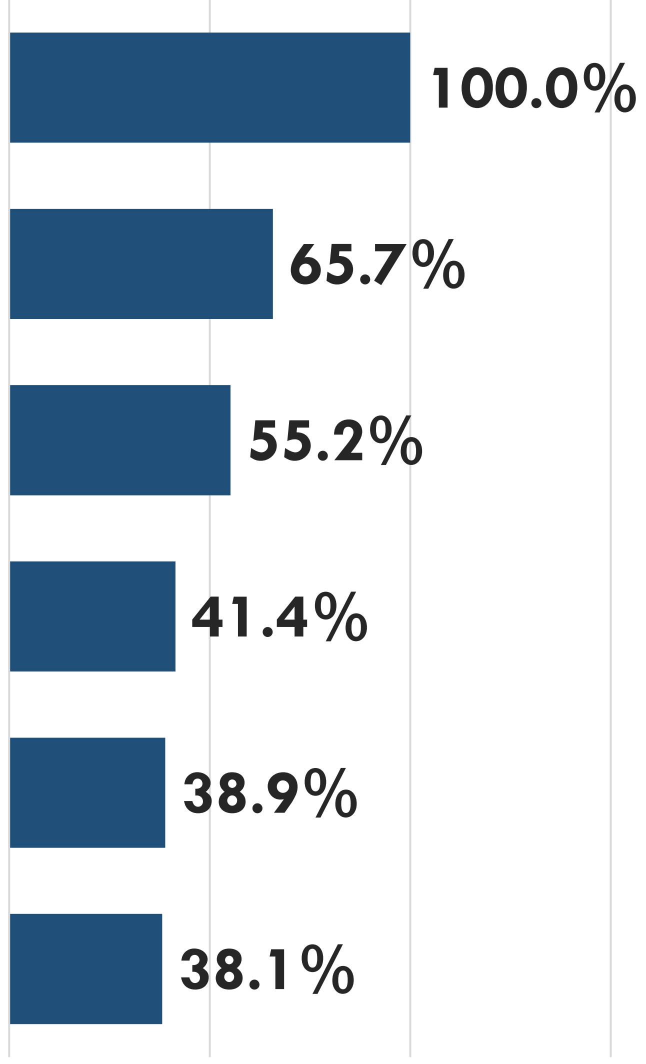
Destination Analysts

THE ARTS & CULTURE VISITOR

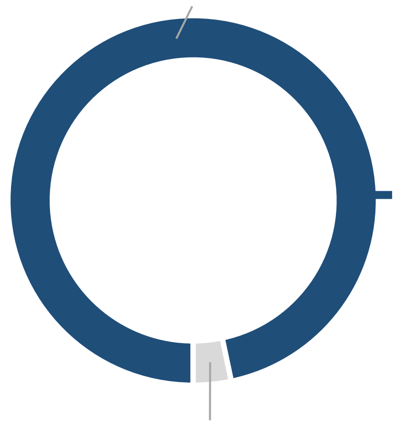
Q4 2022

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



Domestic vs. International



POINT OF ORIGIN: TOP STATES

Florida	45.0%
Illinois	5.3%
Indiana	4.5%

Top Communities Visited

St. Petersburg	88.6%
St. Pete Beach	19.7%
Treasure Island	9.2%
Madeira Beach	8.7%
Clearwater	8.1%

Top Activities

84.2%	83.0%	37.3%	29.8%
Dining in restaurants	Visit museums	Visit the beach	Visit friends or family

Length of Stay

2.9 Days on Average

Travel Party Size

2.5 **People**

4.5% Traveled with Children

Daily Spending

$104.32

Per Person

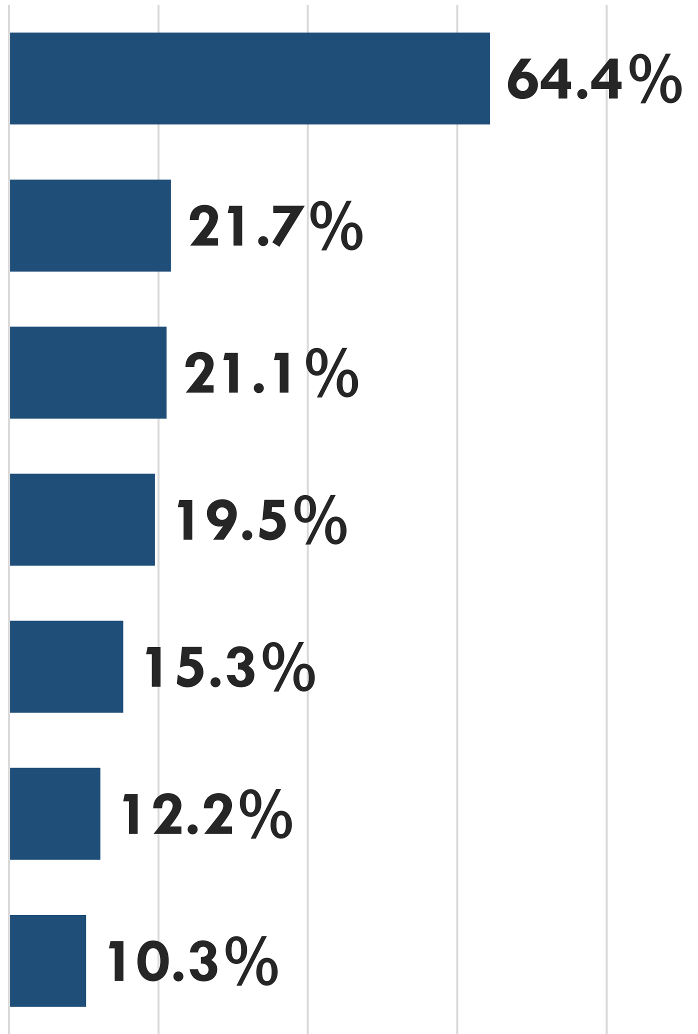
Destination Analysts

THE AFFLUENT VISITOR

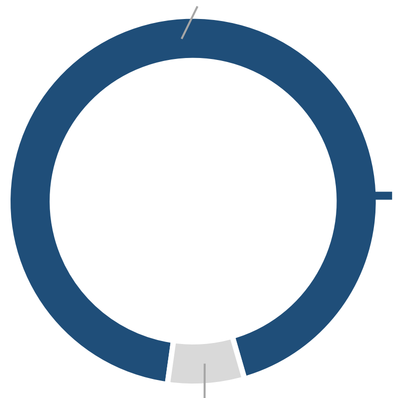
Q4 2022

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

Factors Important to Destination Decision



Domestic vs. International



POINT OF ORIGIN: TOP STATES

Florida	26.9%
New York	8.6%
Wisconsin	8.3%

Top Communities Visited

Madeira Beach	34.1%
St. Petersburg	32.8%
Treasure Island	30.9%
Clearwater	27.8%
St. Pete Beach	24.2%

Top Activities

77.1%	34.6%	30.8%	19.3%
Visit the beach	Shopping	Dining in restaurants	Swimming

Length of Stay

5.2 Days on Average

Travel Party Size

2.4 People

15.0% Traveled with Children

Daily Spending

$157.00

Per Person

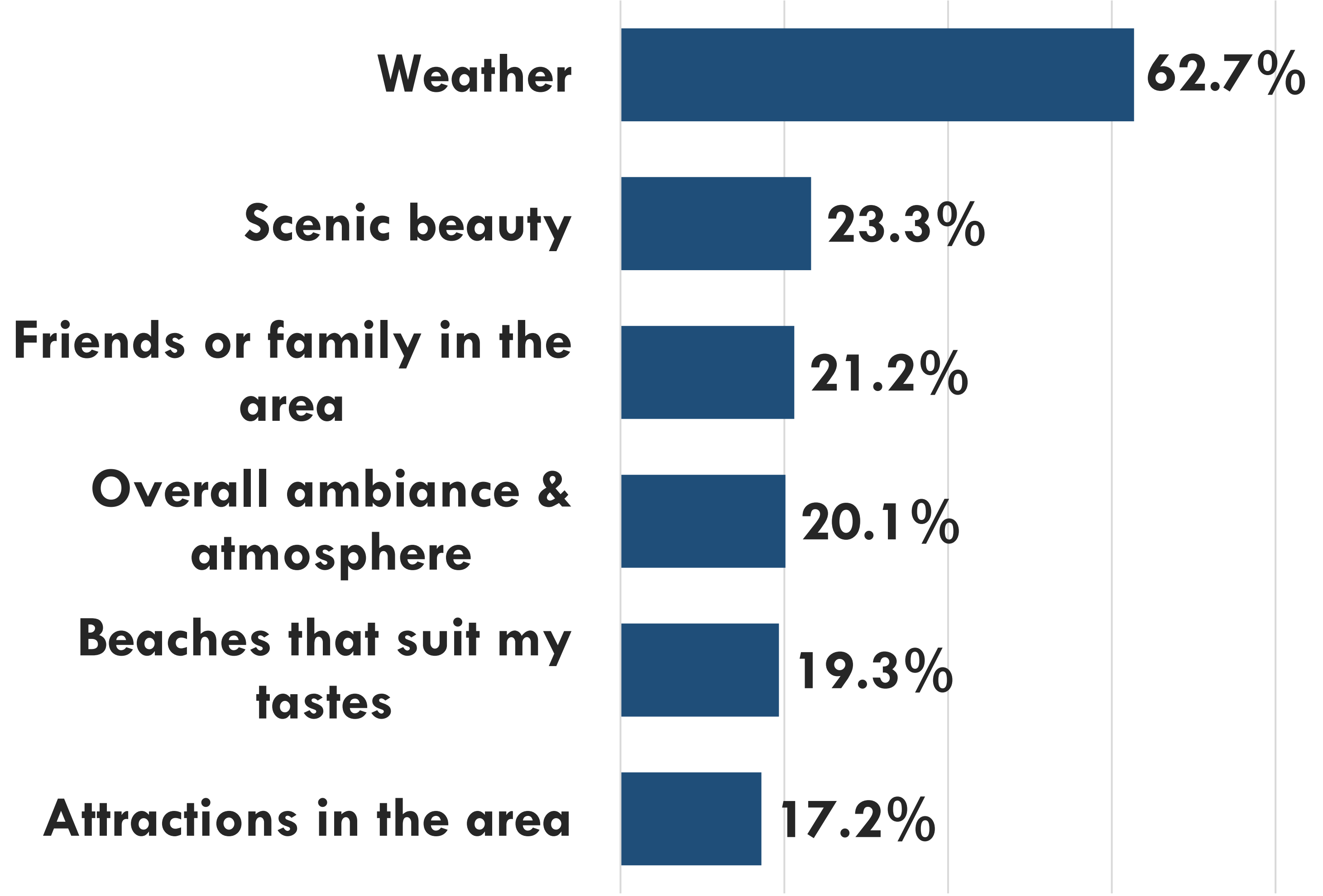
Destination Analysts

THE FAMILY TRAVELER

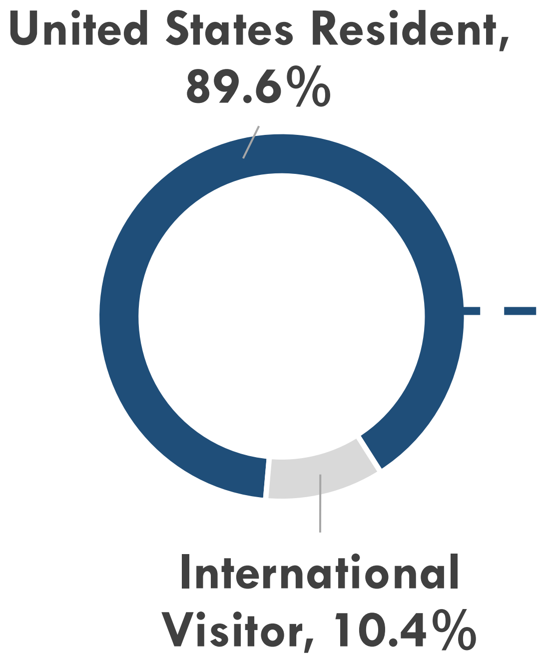
Q4 2022

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

Factors Important to Destination Decision



Domestic vs. International



POINT OF ORIGIN: TOP STATES

Florida	31.0%
Indiana	8.4%
Illinois	5.4%

Top Communities Visited

St. Petersburg	34.1%
Treasure Island	33.3%
St. Pete Beach	26.2%
Madeira Beach	24.5%
Clearwater Beach	21.4%

Top Activities

82.1%	43.6%	43.3%	28.8%
Visit the beach	Dining in restaurants	Shopping	Swimming

Length of Stay

5.3 Days on Average

Travel Party Size

4.0 People

100% Traveled with Children

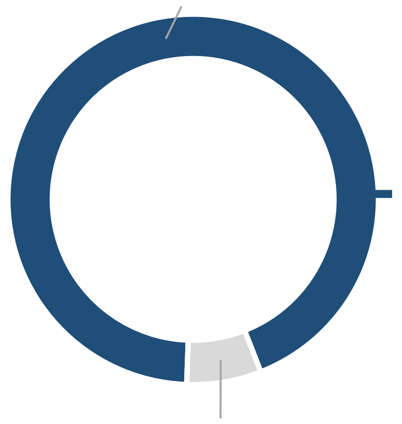
Daily Spending

$122.00 Per Person

Destination Analysts

Q4 2022 Visitor Summaries by Generation

Domestic vs. International



POINT OF ORIGIN: TOP STATES

Florida	47.4%
Ohio	5.2%
New York	4.6%

Length of Stay

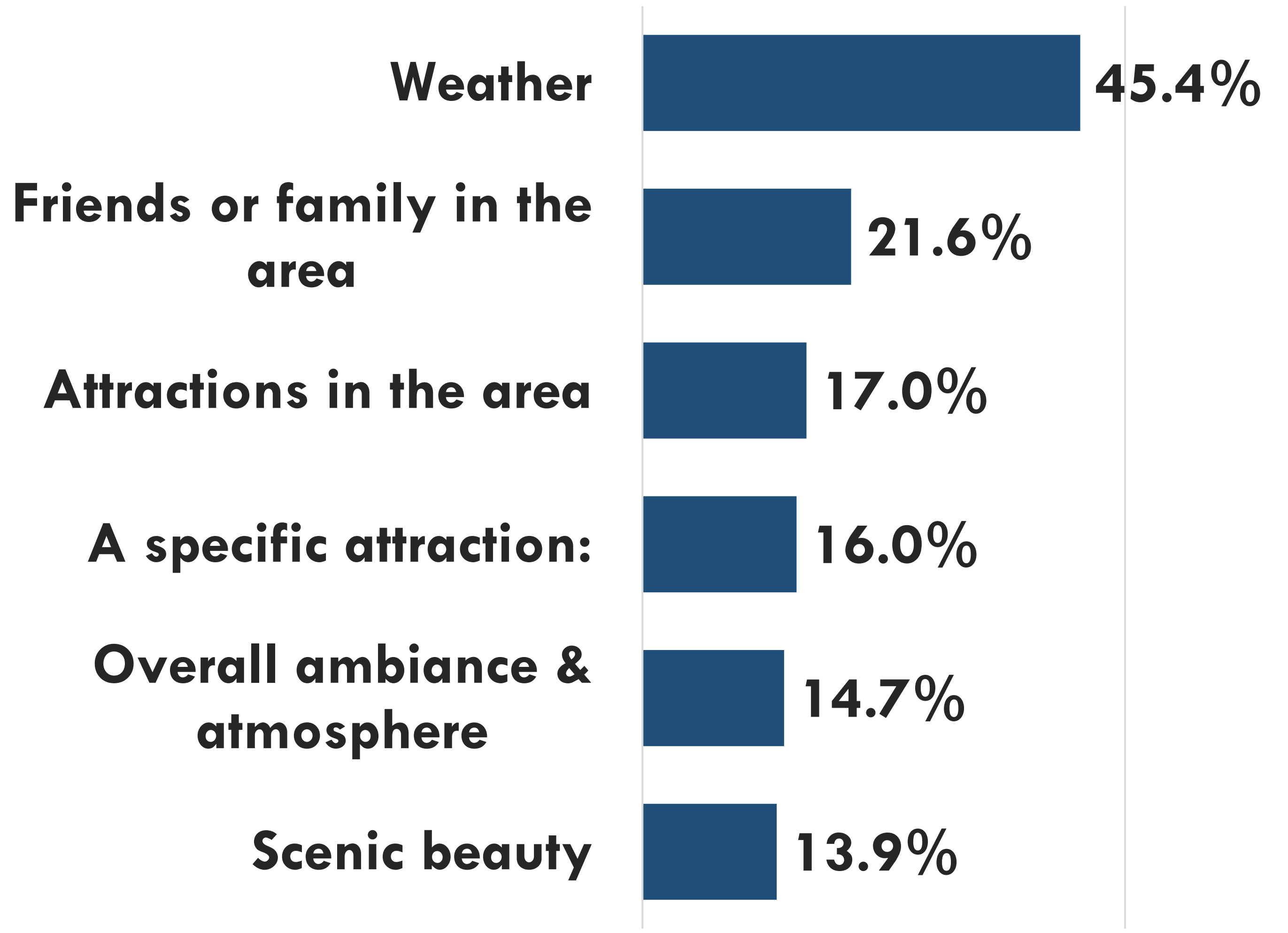
3.8 Days on Average

Travel Party Size

2.2 People

12.5% Traveled with Children

Factors Important to Destination Decision



Top Communities Visited

St. Petersburg	46.2%
Madeira Beach	23.8%
Treasure Island	21.5%
St. Pete Beach	16.5%
Clearwater	14.2%

Top Activities

58.5%	48.4%	40.3%	33.9%
Visit the beach	Dining in restaurants	Shopping	Visit museums

Daily Spending

$137.49

Per Person

Destination Analysts

THE GEN X VISITOR

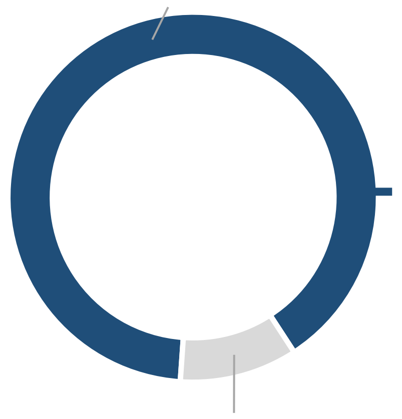
Q4 2022

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

Factors Important to Destination Decision

Factor	%
Weather	62.3%
Friends or family in the area	22.4%
Scenic beauty	21.0%
Overall ambiance & atmosphere	16.8%
Attractions in the area	15.4%
Beaches that suit my tastes	14.0%

Domestic vs. International



POINT OF ORIGIN: TOP STATES

Florida	28.0%
Ohio	6.3%
Indiana	6.1%

Top Communities Visited

St. Petersburg	39.0%
Treasure Island	32.3%
Madeira Beach	29.2%
St. Pete Beach	24.5%
Clearwater	19.9%

Top Activities

72.8%	44.0%	43.8%	22.5%
Visit the beach	Shopping	Dining in restaurants	Visit museums

Length of Stay

5.2 Days on Average

Travel Party Size

2.5 People

17.4% Traveled with Children

Daily Spending

$147.72

Per Person

Destination Analysts

THE BABY BOOMER VISITOR

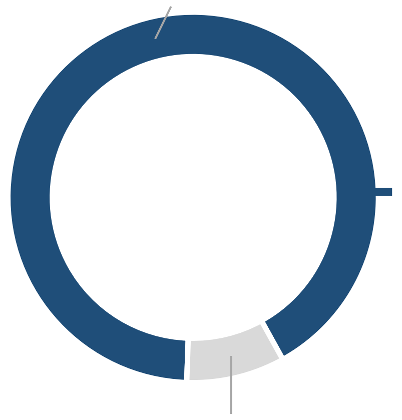
Q4 2022

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

Factors Important to Destination Decision

Factor	%
Weather	54.0%
Friends or family in the area	25.2%
Scenic beauty	22.8%
Attractions in the area	22.7%
Beaches that suit my tastes	18.1%
Arts & cultural offerings	17.7%

Domestic vs. International



POINT OF ORIGIN: TOP STATES

Florida	34.6%
Indiana	8.5%
Ohio	7.2%

Top Communities Visited

St. Petersburg	44.6%
Madeira Beach	37.9%
St. Pete Beach	23.8%
Treasure Island	18.0%
Clearwater	16.4%

Top Activities

Visit the beach	Dining in restaurants	Shopping	Visit museums
64.4%	62.2%	52.8%	30.6%

Length of Stay

5.0 Days on Average

Travel Party Size

2.3 People

1.9% Traveled with Children

Daily Spending

$136.32

Per Person

Destination Analysts

Planning the St. Pete/Clearwater Trip

WHEN DECISION TO VISIT WAS MADE

On average, St. Pete/Clearwater visitors decided to visit Pinellas County approximately 11.2 weeks (78.1 days) prior to their actual arrival date – nearly double the level noted in Q4 2021 (6.1 weeks/42.5 days). Hotel decisions reflect a moderate increase in time to 15.0 weeks from 13.3 weeks a year ago (105.1 days vs. 92.9 days). However, the VFR decision before arrival time increased dramatically, to 13.4 weeks from 5.4 weeks (93.6 days vs. 38.0 days) and Day trippers show a sharper rise of 8.1 weeks from 2.6 weeks in Q4 2021 (56.8 days from 18 days).

Figure 1: Average Time Between Decision to Visit and Arrival

78.1 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. 1,386 responses.

Detail by Type of Visitor

	Hotel	VFR	Day Trip
Average Days	105.1	93.6	56.8
Sample Size:	279	196	520

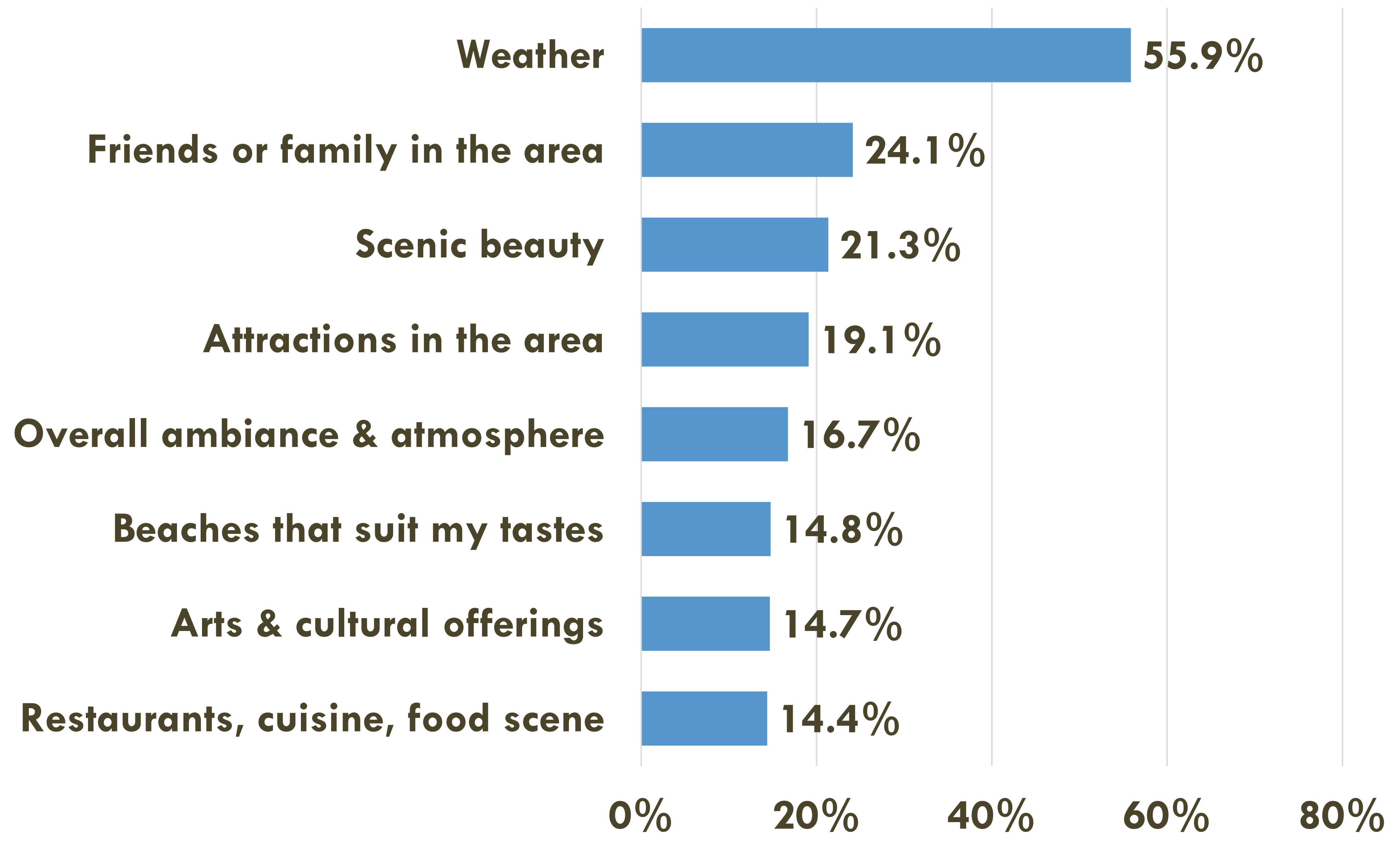
IMPORTANT FACTORS TO DESTINATION DECISION

In Q4 2022, the weather even more emphatically dominates the decisions to visit the St. Pete/Clearwater area compared to a year ago (55.9% vs. 46.4% in Q4 2021).

Friends/family (24.1%) and scenic beauty (21.3%) vie for the second-place spot, both well below Q4 2021 (37.3%, 34.2%, respectively). Easy to get to, the second-most common reason a year ago, dropped substantially (10.5% vs. 41.1%), likely reflecting shifts due to the reverberations from the impact of COVID-19.

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

Figure 2: Important to Decision to Visit



Question: Which of the following were IMPORTANT to your decision to take this trip to the St. Pete/Clearwater area? (Select all that apply) Base: All Respondents. 1,350 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Weather	56.4%	52.9%	52.8%
Friends or family in the area	18.6%	67.0%	22.4%
Scenic beauty	20.5%	34.0%	17.3%
Attractions in the area	22.1%	14.7%	18.6%
Overall ambiance & atmosphere	16.0%	25.7%	13.1%
Beaches that suit my tastes	26.8%	17.2%	6.1%
Arts & cultural offerings	13.4%	13.5%	16.0%
Restaurants, cuisine, food scene	12.4%	23.3%	12.7%
Sample Size:	**266**	**192**	**506**

IMPORTANT FACTORS TO DESTINATION DECISION – FULL DETAIL

	Total	Hotel	VFR	Day Trip
Weather	**55.9%**	**56.4%**	**52.9%**	**52.8%**
Friends or family in the area	24.1%	18.6%	**67.0%**	22.4%
Scenic beauty	21.3%	20.5%	**34.0%**	17.3%
Attractions in the area	19.1%	22.1%	14.7%	18.6%
Overall ambiance & atmosphere	16.7%	16.0%	**25.7%**	13.1%
Beaches that suit my tastes	14.8%	**26.8%**	17.2%	6.1%
Arts & cultural offerings	14.7%	13.4%	13.5%	**16.0%**
Restaurants, cuisine, food scene	14.4%	12.4%	**23.3%**	12.7%
A specific attraction:	10.8%	11.2%	3.2%	12.8%
Easy to get to	10.5%	8.6%	14.2%	8.8%
St. Pete Pier	8.0%	5.3%	4.1%	**10.6%**
Shopping opportunities	5.8%	4.7%	2.7%	6.3%
Recommendation from people I know	5.4%	5.4%	**13.0%**	2.5%
Outdoor recreational opportunities	5.0%	**6.5%**	4.5%	4.5%
Golf	3.0%	2.7%	0.3%	3.7%
The area's unique culture	2.1%	2.7%	2.3%	1.9%
Special event(s) and/or festival(s)	2.1%	2.6%	0.0%	2.2%
Fishing opportunities	1.8%	1.6%	2.3%	1.8%
The St.Pete/Clearwater area is romantic	1.4%	3.5%	0.9%	0.7%
Sports or sporting events	1.0%	1.8%	0.0%	0.9%
Articles, features, reviews, etc. about the area	0.8%	2.0%	0.9%	0.3%
Good deal on airfare	0.7%	2.0%	0.0%	0.3%
Good hotel rate	0.6%	1.2%	0.0%	0.6%
The St.Pete/Clearwater area is family-friendly	0.4%	1.2%	0.5%	0.0%
Appealing hotels/resorts and other lodging options	0.4%	1.6%	0.0%	0.0%
Breweries/Distilleries/Craft beer scene	0.3%	0.4%	0.0%	0.2%
Advertisements for the area	0.2%	0.4%	0.0%	0.2%
Lifelong desire to visit	0.1%	0.0%	0.5%	0.0%
Base	**1,350**	**266**	**192**	**506**

Differences seen amongst visitor types:

- Although over half of every visitor type was drawn by the weather, Hotel guests cited it most often (56.4%). In addition, more Hotel guests than others focused on beaches (26.8%).
- Besides visiting friends/family (67.0%), a larger share of VFRs came for the scenic beauty (34.0%), overall ambiance/atmosphere (25.7%), cuisine (23.3%), and they were more often guided by recommendations of others (13.0%).
- Day trippers were somewhat more attuned to arts/cultural offerings (16.0%) and more of them cited the St. Pete Pier (10.6%) than others.

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. 1,350 responses.

TRAVEL PLANNING RESOURCES USED

In Q4 2022, visitors continued to cite user-generated content/review websites as the most utilized travel planning resource (30.3%). One-in-four also used/listened to online travel agencies (26.1%), friends/relatives (24.7%), and/or social media content (22.0%). Overall usage of www.VisitStPeteClearwater.com slips from a year ago (12.6% from 33.2%), but nearly matches Q4 2020 (12.8%). Of the visitor segments, VFRs were the likeliest to use the official tourism site (25.6%) prior to arriving.

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	30.3%	33.4%
Online travel agencies (Expedia, Travelocity, etc.)	26.1%	0.9%
Opinions of friends or relatives	24.7%	13.8%
Social Media content	22.0%	11.8%
www.VisitStPeteClearwater.com	**12.6%**	**0.8%**
Travel agency (traditional, offline)	2.0%	0.4%
Travel guides, brochures	2.0%	3.8%
Television programming	2.0%	0.6%
Radio programming	1.4%	0.7%
YouTube or other online videos	1.0%	0.5%
Lifestyle or travel magazines	0.8%	0.4%
Newspaper travel section	0.3%	0.1%
Gulf to Bay St Pete/Clearwater Destination Magazine	0.0%	0.1%

Question: Which of the following resources did you use to plan your trip to the St. Pete/Clearwater area BEFORE you arrived, and which did you (or do you plan to) use while IN the area for this trip? (Select all that apply.) Base: All Respondents. 1,386 responses.

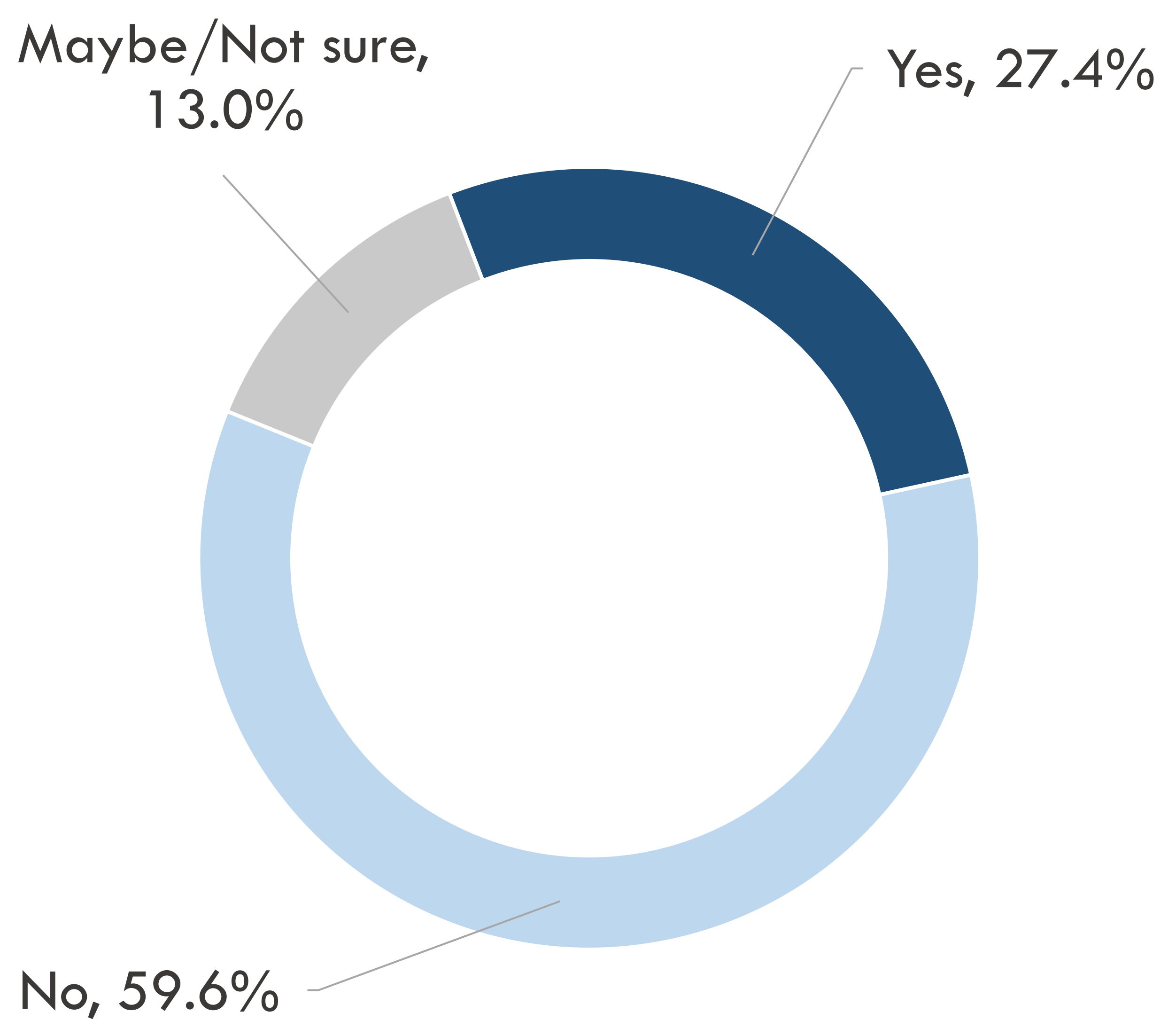
Detail by Traveler Segment

	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	42.3%	50.8%	33.5%	41.6%	22.5%	22.0%
Online travel agencies (Expedia, Travelocity, etc.)	29.5%	2.5%	16.6%	2.7%	25.3%	0.2%
Opinions of friends or relatives	20.6%	16.4%	43.9%	38.3%	25.1%	9.1%
Social Media content	15.3%	9.2%	26.5%	22.4%	22.7%	9.1%
www.VisitStPeteClearwater.com	**8.2%**	**0.7%**	**25.6%**	**0.8%**	**9.7%**	**0.4%**
Travel agency (traditional, offline)	1.8%	0.0%	1.1%	0.0%	2.3%	0.4%
Travel guides, brochures	2.4%	9.1%	4.0%	4.6%	1.6%	1.4%
Television programming	1.5%	0.7%	0.0%	3.1%	2.6%	0.2%
Radio programming	1.1%	0.3%	0.0%	1.4%	1.9%	0.5%
YouTube or other online videos	2.6%	1.1%	0.9%	1.4%	0.6%	0.2%
Lifestyle or travel magazines	0.7%	0.7%	0.3%	1.0%	0.9%	0.2%
Newspaper travel section	0.0%	0.0%	0.9%	1.2%	0.4%	0.0%
Gulf to Bay St Pete/Clearwater Destination Magazine	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sample Size:	**279**		**196**		**520**	

EARNED & PAID MEDIA RECALL

More than one-in-four visitors in Q4 2022 recalled seeing, hearing or reading earned media or advertisements/promotions for St. Pete/Clearwater in the past six months (27.4% -- down slightly from 31.7% in Q4 2021). Across all segments, Day-trippers were most attuned to media content for the destination (32.2%).

Figure 4: Media Recall



Question: In the last six months, have you seen, read, or heard any travel stories, advertising, or promotions for the St. Pete/Clearwater area? Base: All Respondents 1,352 responses.

Detail by Traveler Segment

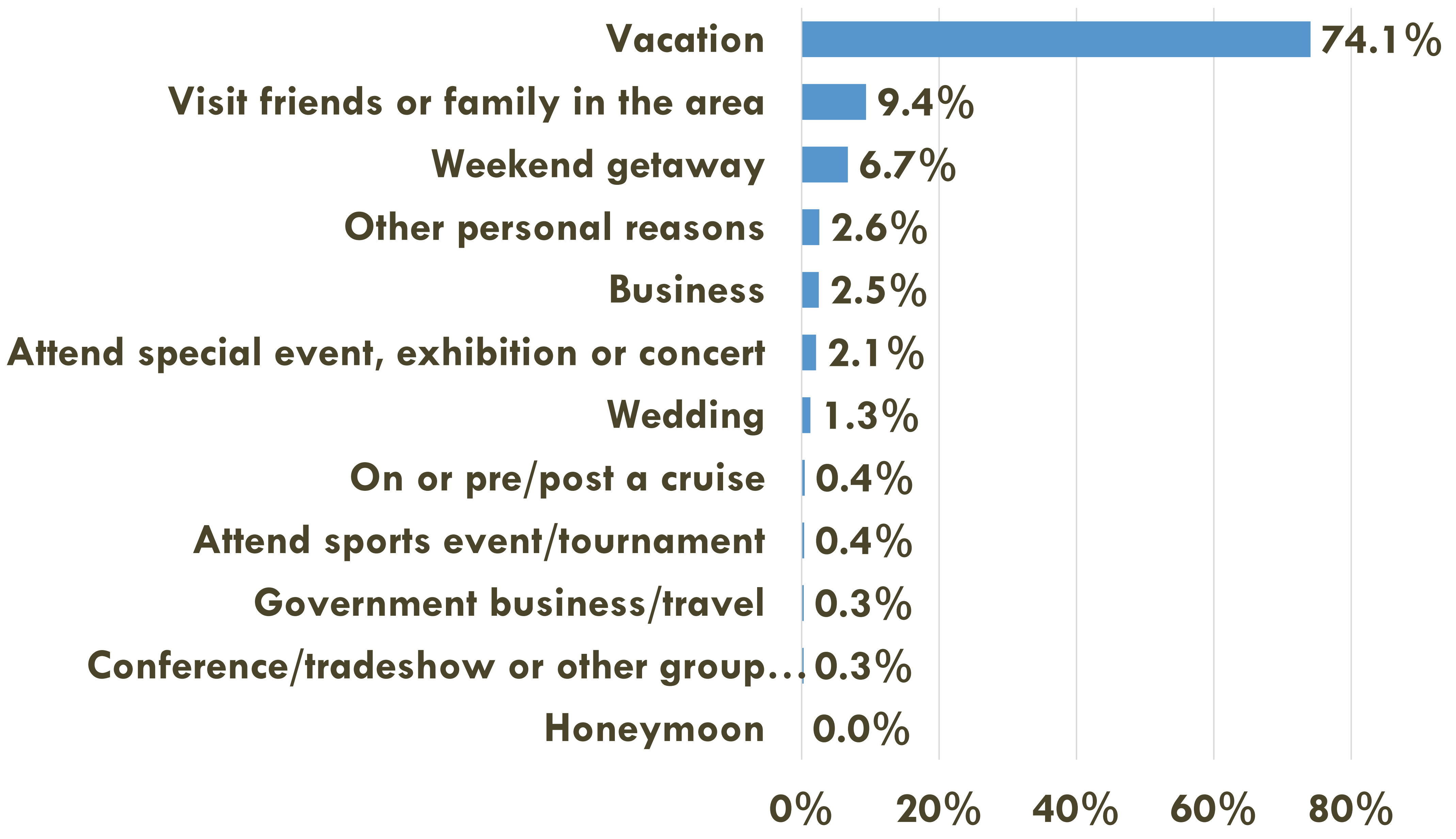
	Hotel	VFR	Day Trip
Yes	**21.4%**	**18.9%**	**32.2%**
No	68.2%	74.3%	52.3%
Maybe/Not sure	10.4%	6.8%	15.4%
Sample Size:	**271**	**195**	**502**

Visitor Trip Details

PRIMARY REASON FOR VISIT

Clearly surpassing the level of a year ago, in Q4 2022 vacations dominated other reasons to visit the St. Pete/Clearwater area (74.1% up from 46.0% a year ago), likely reflecting post-COVID pent up demand. The next-two-most cited reasons include visiting friends/family (9.4%, down from 28.2%) and a weekend getaway (6.7%, similar to 6.0% in Q4 2021). In Q4 2022, Hotel guests and Day-trippers were almost equally likely to cite a vacation (74.9% vs. 72.6%, respectively). Meanwhile, even VFRs noted a higher interest in vacations, with more coming for vacation (51.9%, up from 28.1% a year ago) than visiting friends/family (42.2%, slipping from 58.1%).

Figure 5: Primary Reason for Visit



Question: What is your primary reason for visiting the St. Pete/Clearwater Area? (Select one)
Base: All Respondents. 1,355 responses.

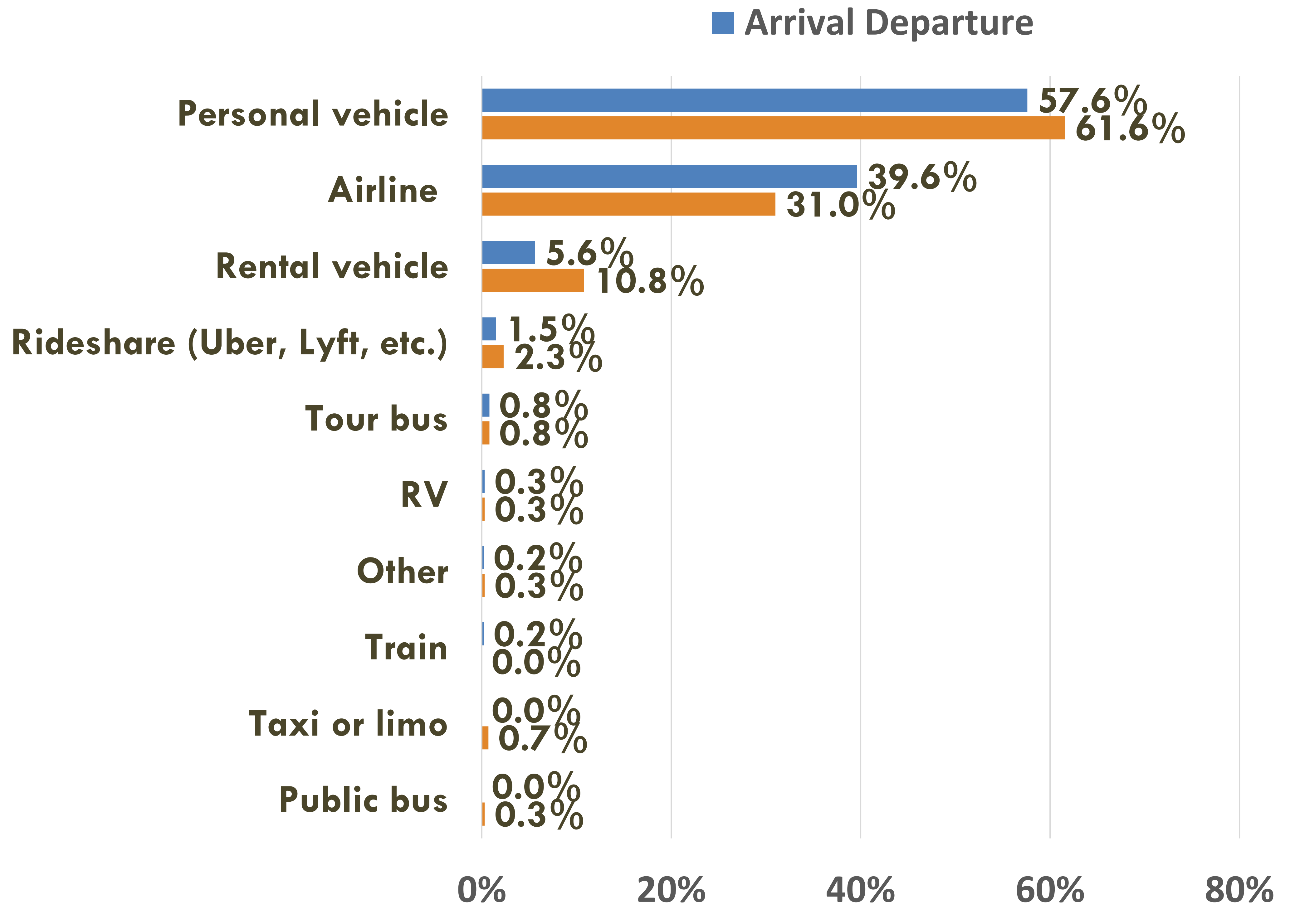
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Vacation	**74.9%**	**51.9%**	**72.6%**
Visit friends or family in the area	4.7%	42.2%	8.6%
Weekend getaway	9.4%	1.4%	7.4%
Other personal reasons	1.1%	1.1%	3.8%
Business	3.4%	2.5%	2.3%
Attend special event, exhibition or concert	0.3%	0.5%	3.3%
Wedding	3.3%	0.3%	0.8%
On or pre/post a cruise	0.7%	0.0%	0.5%
Attend sports event/tournament	0.7%	0.0%	0.4%
Government business/travel	0.7%	0.0%	0.2%
Conference/tradeshow or other group meeting	0.7%	0.0%	0.2%
Honeymoon	0.0%	0.0%	0.0%
Sample Size:	**279**	**195**	**490**

METHOD OF ARRIVAL & DEPARTURE

The top methods of arrival in Q4 2022 continue to be personal vehicle (57.6%) and airline (39.6%), representing a pattern similar to a year ago (62.8%, 38.0%, respectively in Q4 2021). Day trippers remained the likeliest segment to **drive** their personal vehicle (55.5%, although fewer than a year ago (73.1%). Meanwhile, VFRs were the most likely to **fly** into the area (57.0%, somewhat more than Hotel guests at 52.7%).

Figure 6: Method of Arrival and Departure



Question: How did you arrive in the St. Pete/Clearwater area and how will you leave? (Select all that apply) Base: All Respondents. 1,391 responses.

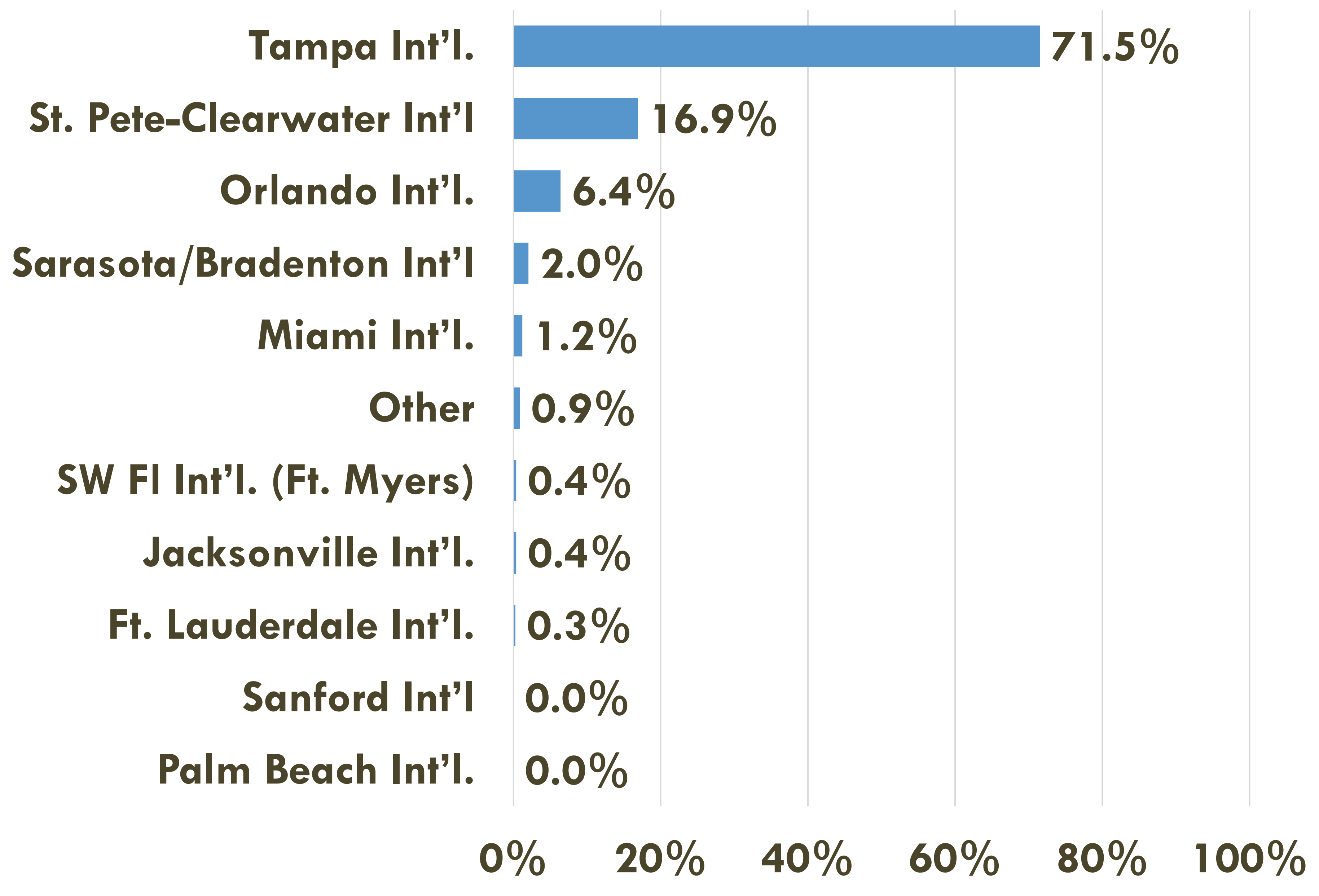
Detail by Traveler Segment

	Hotel		VFR		Day Trip	
	Arrival	**Departure**	**Arrival**	**Departure**	**Arrival**	**Departure**
Personal vehicle	40.5%	43.7%	41.2%	55.7%	**55.5%**	60.5%
Airline	**52.7%**	38.5%	**57.0%**	45.0%	37.4%	29.3%
Rental vehicle	5.5%	22.1%	0.9%	6.0%	2.6%	8.5%
Tour bus	0.0%	0.0%	0.0%	1.8%	3.3%	3.3%
Rideshare (Uber, Lyft, etc.)	1.4%	3.2%	0.0%	1.0%	0.4%	0.5%
RV	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
Train	0.4%	0.0%	1.1%	0.0%	0.1%	0.0%
Other	0.0%	0.0%	0.0%	0.9%	0.3%	0.7%
Taxi or limo	0.0%	0.0%	0.0%	1.8%	0.2%	1.4%
Public bus	0.0%	1.1%	0.0%	0.9%	0.0%	1.2%
Sample Size:	**280**		**196**		**522**	

ARRIVAL AIRPORT

Across all segments, two-thirds or more of air travelers arrived in Pinellas County through Tampa International (71.5% vs. 67.1% vs. in Q4 2021). Second-place St. Pete-Clearwater International greeted almost one-in-five (16.9%, similar to a year ago (16.9%).

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. 705 responses.

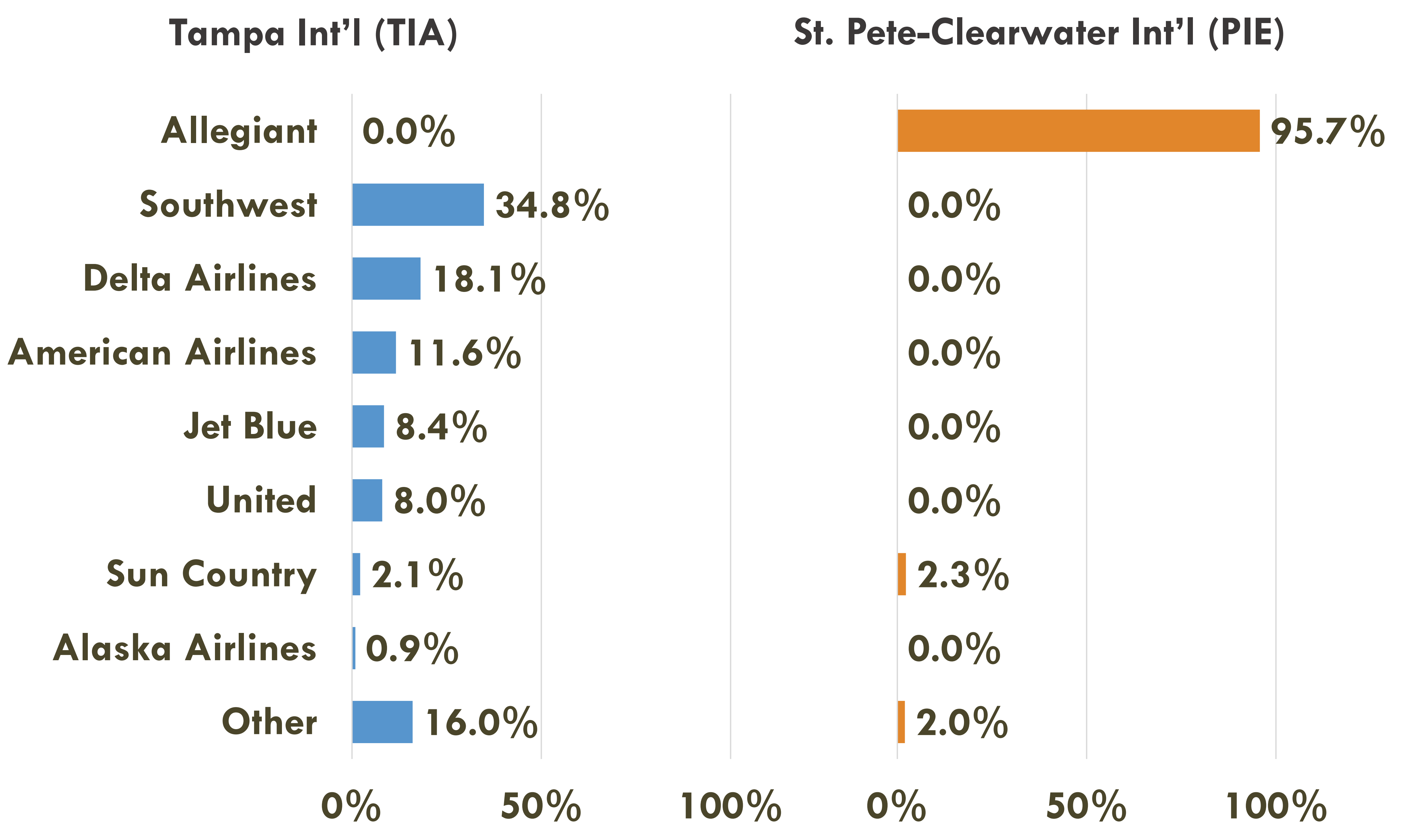
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Tampa Int'l.	68.3%	80.3%	71.5%
St. Pete-Clearwater Int'l	18.5%	11.7%	17.5%
Orlando Int'l.	7.7%	1.3%	5.8%
Sarasota/Bradenton Int'l	2.0%	4.9%	1.6%
Miami Int'l.	2.1%	0.8%	0.8%
Other	0.7%	0.4%	1.3%
SW Fl Int'l. (Ft. Myers)	0.0%	0.0%	0.8%
Jacksonville Int'l.	0.0%	0.0%	0.8%
Ft. Lauderdale Int'l.	0.7%	0.4%	0.0%
Sanford Int'l	0.0%	0.0%	0.0%
Palm Beach Int'l.	0.0%	0.0%	0.0%
Sample Size:	**146**	**121**	**204**

ARRIVAL AIRLINE BY AIRPORT

All Pinellas County visitors who flew into St. Pete-Clearwater International in Q4 2022 arrived via Allegiant Air. Visitors arriving in the destination via Tampa International Airport most commonly flew Southwest Airlines (34.8%), Delta Airlines (18.1%), or American Airlines (11.6%), all similar to Q4 2021 (34.9% Southwest, 19.0% DL, and 13.2% AA). Meanwhile, Jet Blue (8.4% vs. 3.7% in Q4 2021) has overtaken United (8.0% vs. 12.2% in Q4 2021) in airline selection.

Figure 8: Arrival Airline Airport



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. 626 responses.

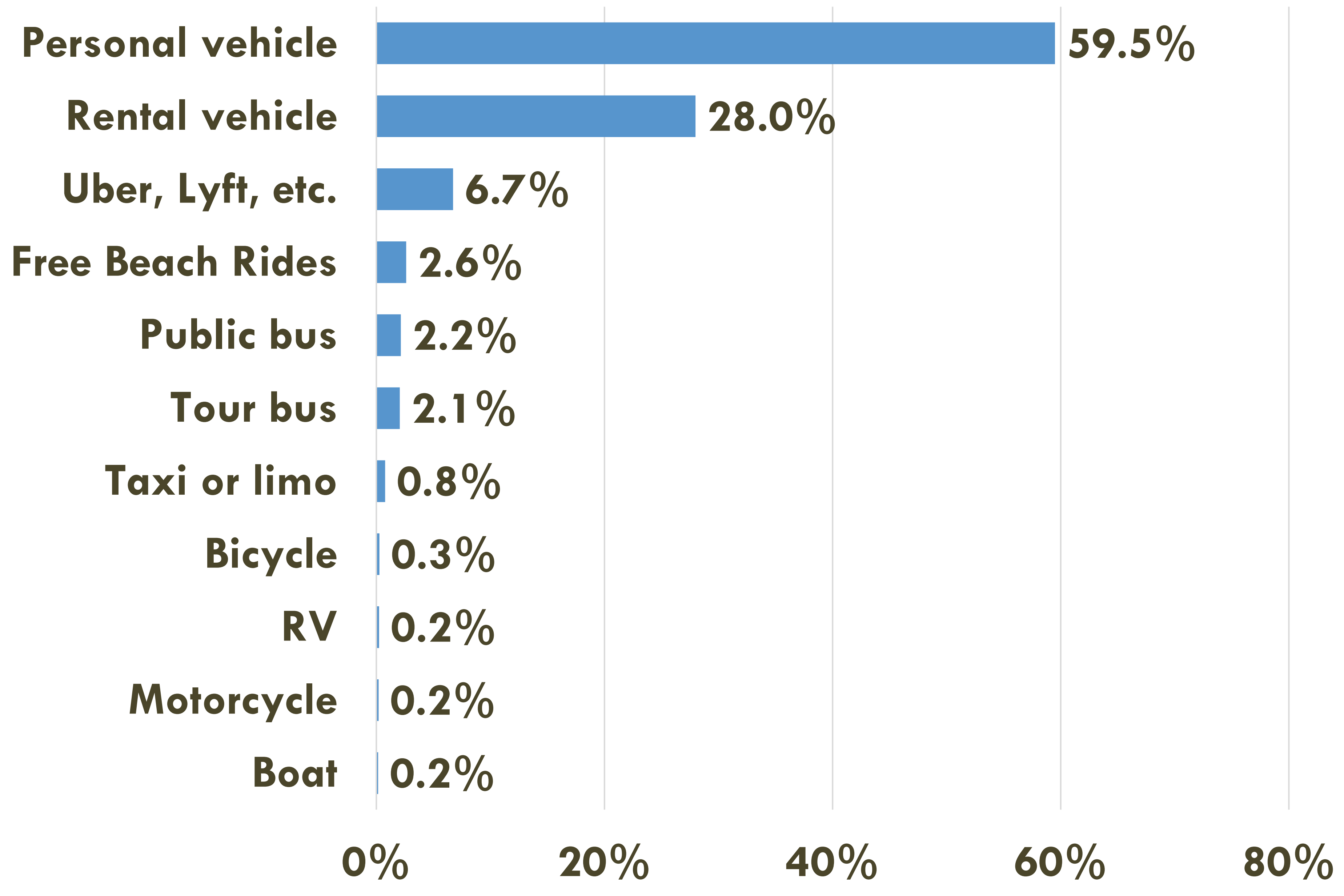
Detail by Traveler Segment

	Hotel		VFR		Day Trip	
	TIA	PIE	TIA	PIE	TIA	PIE
Allegiant	**0.0%**	**100.0%**	**0.0%**	**100.0%**	**0.0%**	**100.0%**
Southwest	27.7%	0.0%	32.5%	0.0%	37.6%	0.0%
Delta Airlines	23.1%	0.0%	19.1%	0.0%	16.5%	0.0%
American Airlines	10.9%	0.0%	16.4%	0.0%	11.7%	0.0%
Jet Blue	8.6%	0.0%	10.5%	0.0%	9.5%	0.0%
United	13.7%	0.0%	5.2%	0.0%	5.6%	0.0%
Sun Country	0.9%	0.0%	0.0%	0.0%	2.3%	0.0%
Alaska Airlines	2.0%	0.0%	0.0%	0.0%	0.6%	0.0%
Other	13.1%	0.0%	16.4%	0.0%	16.2%	0.0%
Sample Size:	**127**		**109**		**185**	

TRANSPORTATION USED IN-MARKET

In Q4 2022, the primary transportation used in St. Pete/Clearwater continued to be visitors' personal vehicle (59.5%), although somewhat less than a year ago (71.9%). In exchange for fewer driving their own car, more visitors rented a vehicle (28.0%, from 23.3% in Q4 2021), presumably because more visitors fly into the area. VFRs (75.1%) and Day trippers (67.0%) remained the most inclined to drive their personal car, but both decline from the high levels noted in Q4 2021 (91% VFRs and 80.4% Day trippers). Hotel guests split more evenly between personal (44.4%) and rental (40.5%) vehicles than those in other segments.

Figure 9: Transportation Used In-Market



Question: Which modes of transportation did you, or will you, use while in the St. Pete/Clearwater area? (Select all that apply) Base: All Respondents. 1,391 responses.

Detail by Traveler Segment

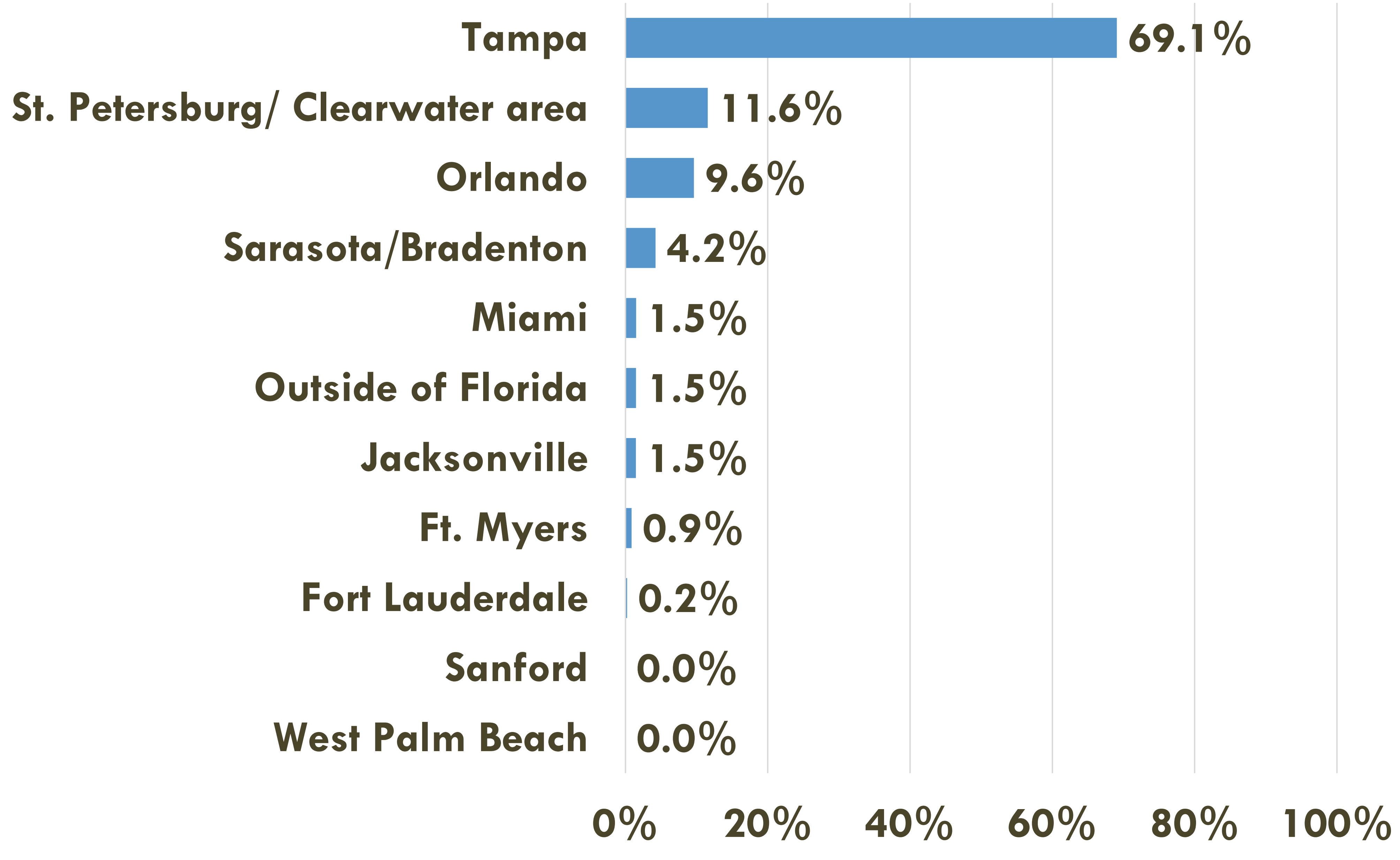
	Hotel	VFR	Day Trip
Personal vehicle	44.4%	75.1%	67.0%
Rental vehicle	40.5%	16.8%	20.3%
Uber, Lyft, etc.	11.9%	5.5%	5.5%
Free Beach Rides	3.0%	3.5%	2.0%
Public bus	4.6%	1.2%	1.4%
Tour bus	0.4%	0.0%	3.3%
Taxi or limo	1.1%	0.5%	0.8%
Bicycle	0.4%	0.9%	0.2%
RV	0.0%	0.0%	0.0%
Motorcycle	0.0%	0.0%	0.3%
Boat	0.8%	0.0%	0.0%
Sample Size:	**280**	**196**	**522**

RENTAL VEHICLE PICK-UP CITY

In Q4 2022, over two-thirds of visitors who rented a vehicle to drive around Pinellas County picked up their vehicle in Tampa (69.1%), similar to a year ago (71.6%).

Secondarily, one-in-ten picked up their car in the St. Petersburg/Clearwater area (11.6% vs. 10.6% in Q4 2021) and a similarly-sized group picked it up in Orlando (9.6% vs. 11.8% last year). Of the segments, Hotel guests were the likeliest to have rented from St. Petersburg/Clearwater (16.7%) and Orlando (12.3%).

Figure 10: Rental Vehicle Pick-Up City



Question: In which city did you rent your rental vehicle? (Select one)
Base: Respondents who arrived in the area by rental car. 443 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Tampa	62.3%	78.9%	70.0%
St. Petersburg/ Clearwater area	16.7%	12.0%	8.6%
Orlando	12.3%	2.7%	8.4%
Sarasota/Bradenton	2.5%	1.4%	6.6%
Miami	2.7%	0.0%	0.8%
Outside of Florida	1.8%	5.0%	1.5%
Jacksonville	0.8%	0.0%	2.8%
Ft. Myers	0.8%	0.0%	1.4%
Fort Lauderdale	0.0%	0.0%	0.0%
Sanford	0.0%	0.0%	0.0%
West Palm Beach	0.0%	0.0%	0.0%
Sample Size:	**113**	**37**	**106**

TRAVEL PARTY SIZE

Typically, travel groups to the St. Pete/Clearwater area hover between two and three people. In Q4 2022, the travel party averaged 2.4, very similar to a year ago (2.3). The average group included a male (1.0) and a female (1.2) and about one-group-in-10 included children (9.6%), somewhat fewer than in Q4 2021 (13.4%).

Figure 11: Travel Party Size

	Mean
Male adults (18 yrs. +)	1.0
Female adults (18 yrs. +)	1.2
Male children (0 to 17 yrs.)	0.1
Female children (0 to 17 yrs.)	0.1
Average Travel Party Size	**2.4**
Percent with children in party	**9.6%**
Sample Size:	**1,372**

Question: How many people of each type are in your immediate travel party, including yourself?
Base: All Respondents. 1,372 responses.

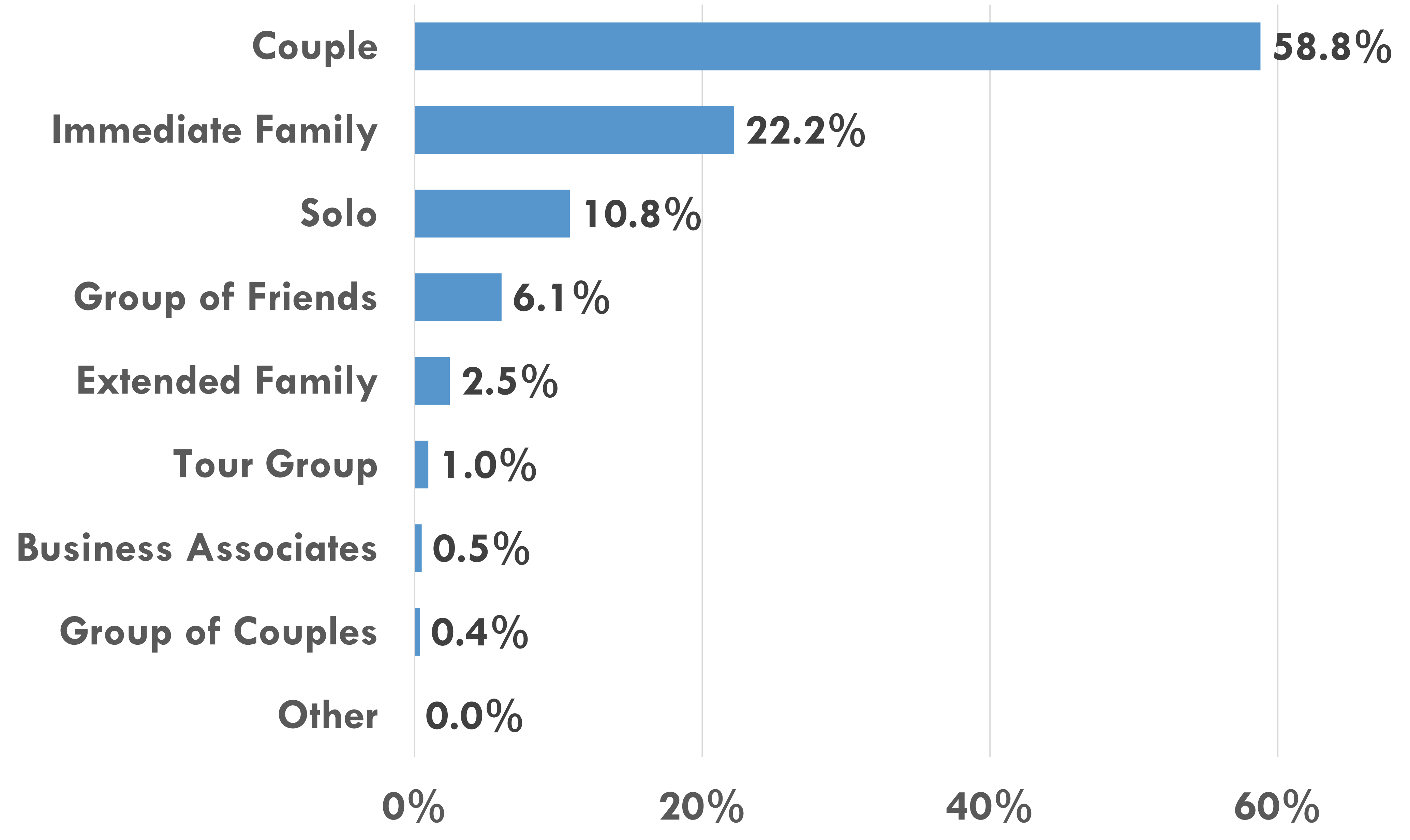
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Male adults (18 yrs. +)	1.0	1.0	0.9
Female adults (18 yrs. +)	1.2	1.3	1.2
Male children (0 to 17 yrs.)	0.1	0.1	0.1
Female children (0 to 17 yrs.)	0.1	0.1	0.1
Average Travel Party Size	**2.4**	**2.4**	**2.3**
Percent with Children in Party	**10.0%**	**8.3%**	**9.5%**
Sample Size:	**275**	**195**	**515**

TRAVEL PARTY COMPOSITION

Almost three-in-five St. Pete/Clearwater visitors traveled to the destination as a couple (58.8% - up from 52.9% in Q4 2021). Further, couples dominate every segment (65.2% hotel guests, 55.6% day trippers, 52.4% VFRs). In addition, about a quarter (22.2%) came with immediate family, similar to a year ago (23.6%). One-in-ten (10.8%) traveled alone and they more likely represent VFRs (17.9%) than other segments.

Figure 12: Travel Party Composition



Question: Which best describes your travel group on this trip? Are you…? (Select all that apply)
Base: All Respondents. 1,391 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Couple	65.2%	52.4%	55.6%
Immediate Family	18.7%	20.2%	23.9%
Solo	6.2%	17.9%	13.2%
Group of Friends	6.3%	6.9%	5.1%
Extended Family	3.5%	3.0%	1.8%
Tour Group	0.0%	0.0%	1.6%
Business Associates	1.7%	0.0%	0.2%
Group of Couples	0.8%	0.9%	0.2%
Other	0.0%	0.0%	0.0%
Sample Size:	**280**	**196**	**522**

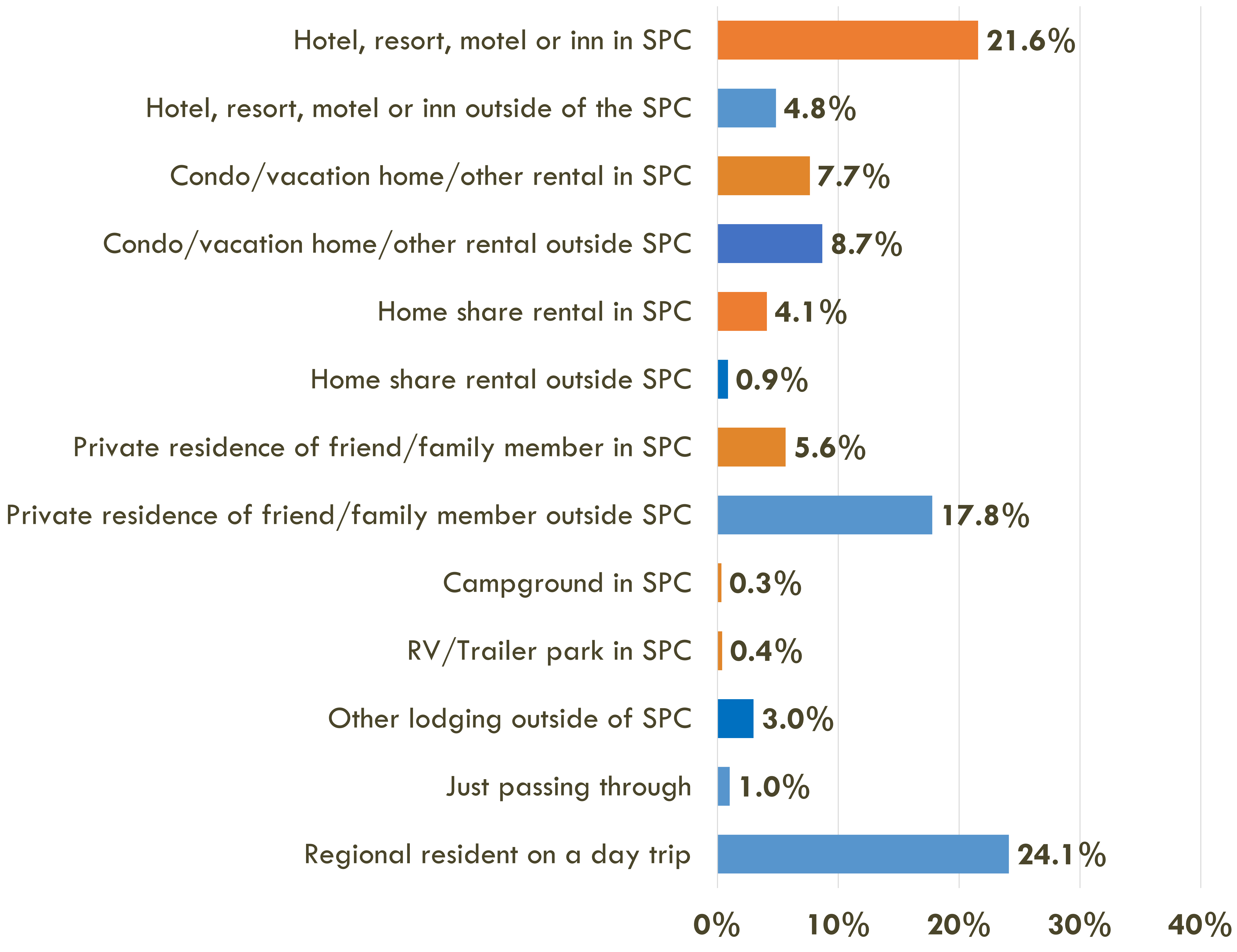
LODGING TYPE

Approximately 40 percent of visitors in Q4 2022 stayed overnight in Pinellas County (39.7%), nearly matching last year (39.5%). The largest proportion of overnight (34.1%) stayed in paid St. Pete/Clearwater accommodations, such as a hotel, resort, motel or inn (21.6%), a condo/vacation home rental (7.7%), or a home share rental (4.1%), plus a few stayed in a campground/RV park (0.7%). In addition, 5.6% 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 as well as regional residents on leisure day trips—represented 60.3 percent of visitors surveyed.

Question: Where are you staying overnight on this trip to the St. Pete/Clearwater area? (Select one) Base: All Respondents. 1,391 responses.

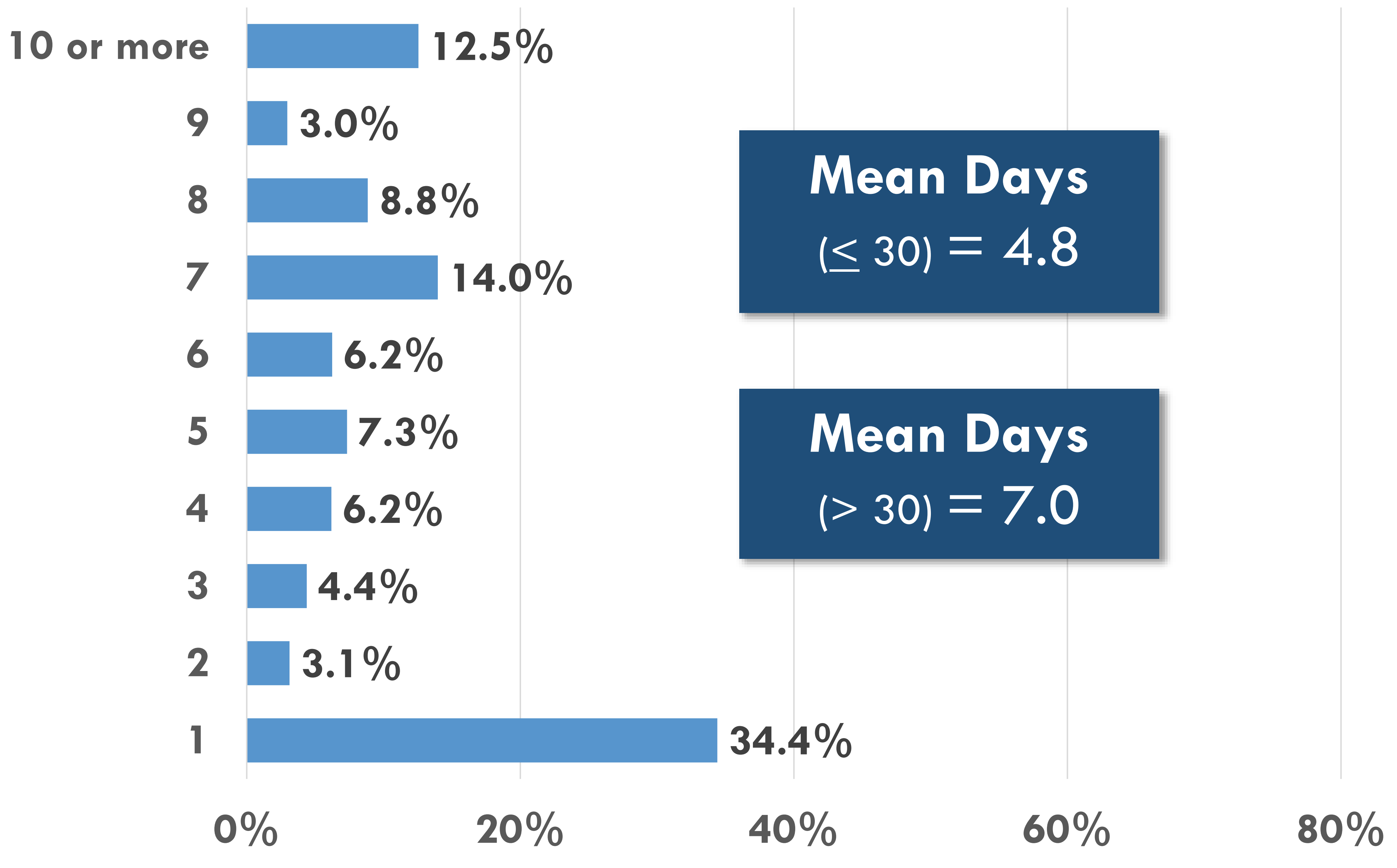
Figure 13: Type of Lodging



DAYS IN ST. PETE/CLEARWATER

The average visitor who spent less than 30 days in the destination stayed almost 5 days in St. Pete/Clearwater (4.8 days), almost 2 extra days from Q4 2021 (3.0). VFRs report the longest stays in Q4 2022 (7.0 days), extending stays by almost two days compared to Q4 2021 (5.1 days). Meanwhile, Hotel guests' length of stay edges slightly higher (5.7 from 5.4 a year ago). The result is that VFRs in Q4 2022 report a longer stay than Hotel guests, in contrast to Q4 2021.

Figure 14: Days in Market



Question: How many total days and nights did you, or will you, stay in the St. Pete/Clearwater area on this trip? Base: All Respondents. 1,302 responses.

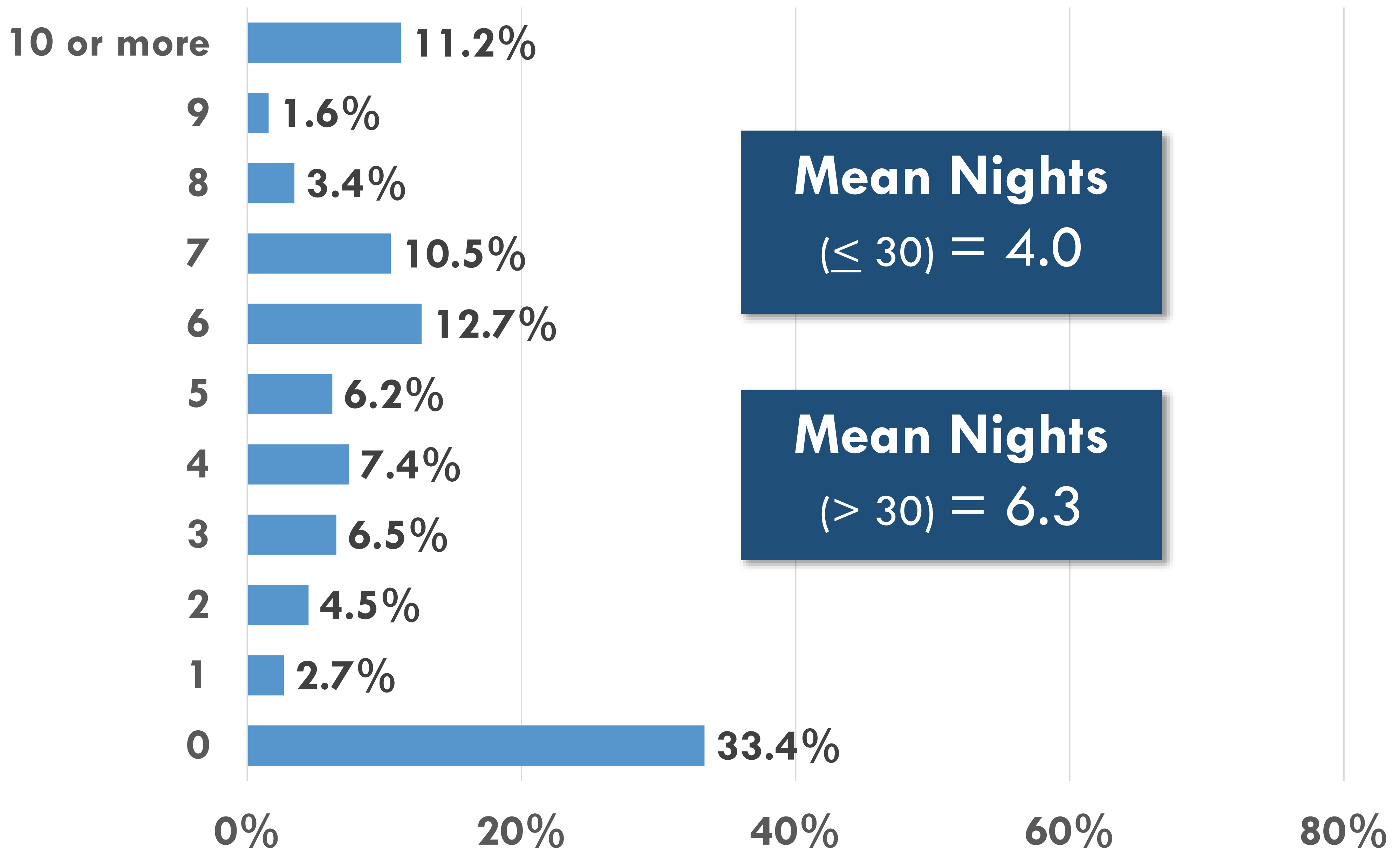
Detail by Traveler Segment

	Hotel	VFR	Day Trip
10 or more	10.0%	24.0%	9.3%
9	2.1%	2.2%	3.5%
8	6.6%	6.4%	9.9%
7	18.0%	28.9%	6.5%
6	7.5%	12.7%	5.1%
5	13.5%	12.4%	4.5%
4	12.7%	5.3%	4.3%
3	13.1%	2.7%	1.6%
2	10.0%	2.6%	1.1%
1	6.5%	2.7%	54.2%
Mean Days (<30)	**5.7**	**7.0**	**3.8**
Mean Days (>30)	**6.0**	**13.4**	**5.2**
Sample Size:	**277**	**167**	**508**

NIGHTS IN ST. PETE/CLEARWATER

The typical visitor spent 4.0 nights in St. Pete/Clearwater, up from 2.4 nights a year ago. Notably, almost three times as many spent at least a week in the area as in Q4 2021 (26.7% vs. 9.0%). As in the past, VFRs averaged the longest stays, with a third of them staying 7 or more nights in the area (36.6%).

Figure 15: Nights in Market



Question: How many total days and nights did you, or will you, stay in the St. Pete/Clearwater area on this trip? Base: All Respondents. 1,303 responses.

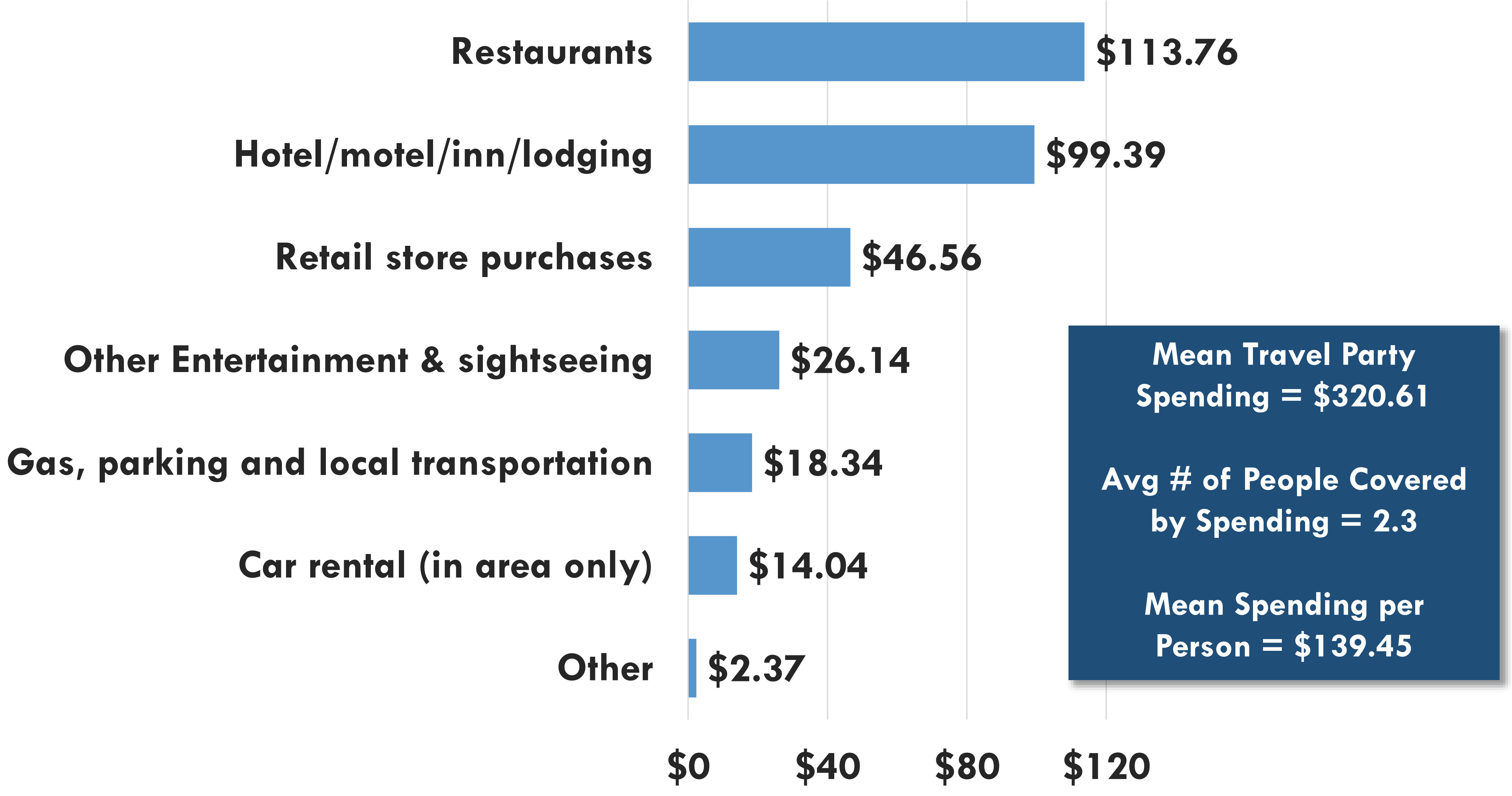
Detail by Traveler Segment

	Hotel	VFR	Day Trip
10 or more	8.3%	22.4%	8.3%
9	1.4%	2.7%	1.4%
8	2.8%	0.3%	4.3%
7	9.3%	11.2%	10.3%
6	15.0%	26.8%	6.5%
5	8.1%	12.2%	4.6%
4	13.9%	11.3%	4.9%
3	14.2%	5.3%	4.2%
2	12.7%	2.9%	2.1%
1	11.0%	1.8%	0.2%
0	3.5%	3.1%	53.2%
Mean Nights (<30)	**4.8**	**6.3**	**--**
Mean Nights (>30)	**5.2**	**12.5**	**--**
Sample Size:	**277**	**167**	**507**

DAILY SPENDING IN-MARKET

In Q4 2022, St. Pete/Clearwater visitors spent $320.61 per travel party in Pinellas County, up from $260.01 in Q4 2021. It is estimated that the average visitor represented $139.45 per person in daily spending (up from $116.81 a year ago), covering an average of 2.3 travelers. Hotel guests continued to report the highest spending, averaging $424.43 per travel party and $193.49 per person (vs. $196.32 last year). This group spent $195.38 per day on St. Pete/Clearwater area lodging accommodations, somewhat less than the $245.88 reported in Q4 2021. The largest spending gains occurred among Day trippers, who reported spending $30 per person more than last year ($119.87 from $89.18).

Figure 16: Per Day Travel Party Spending



Question: PER DAY, approximately how much will you spend on each of the following while in the St. Pete/Clearwater area? Base: All Respondents. 1,313 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Restaurants	$125.35	$95.91	$107.51
Hotel/motel/inn/lodging	$195.38	$28.01	$53.88
Retail store purchases	$44.97	$37.53	$50.18
Other Entertainment & sightseeing	$20.44	$19.16	$30.83
Gas, parking and local transportation	$16.58	$10.49	$20.50
Car rental (in area only)	$20.52	$6.34	$11.51
Other	$1.18	$6.53	$2.15
Mean Spending per Travel Party	**$424.43**	**$203.97**	**$276.55**
# of People Covered by Spending	**2.19**	**2.17**	**2.31**
Mean Spending per Person	**$193.49**	**$94.02**	**$119.87**
Sample Size:	**270**	**183**	**479**

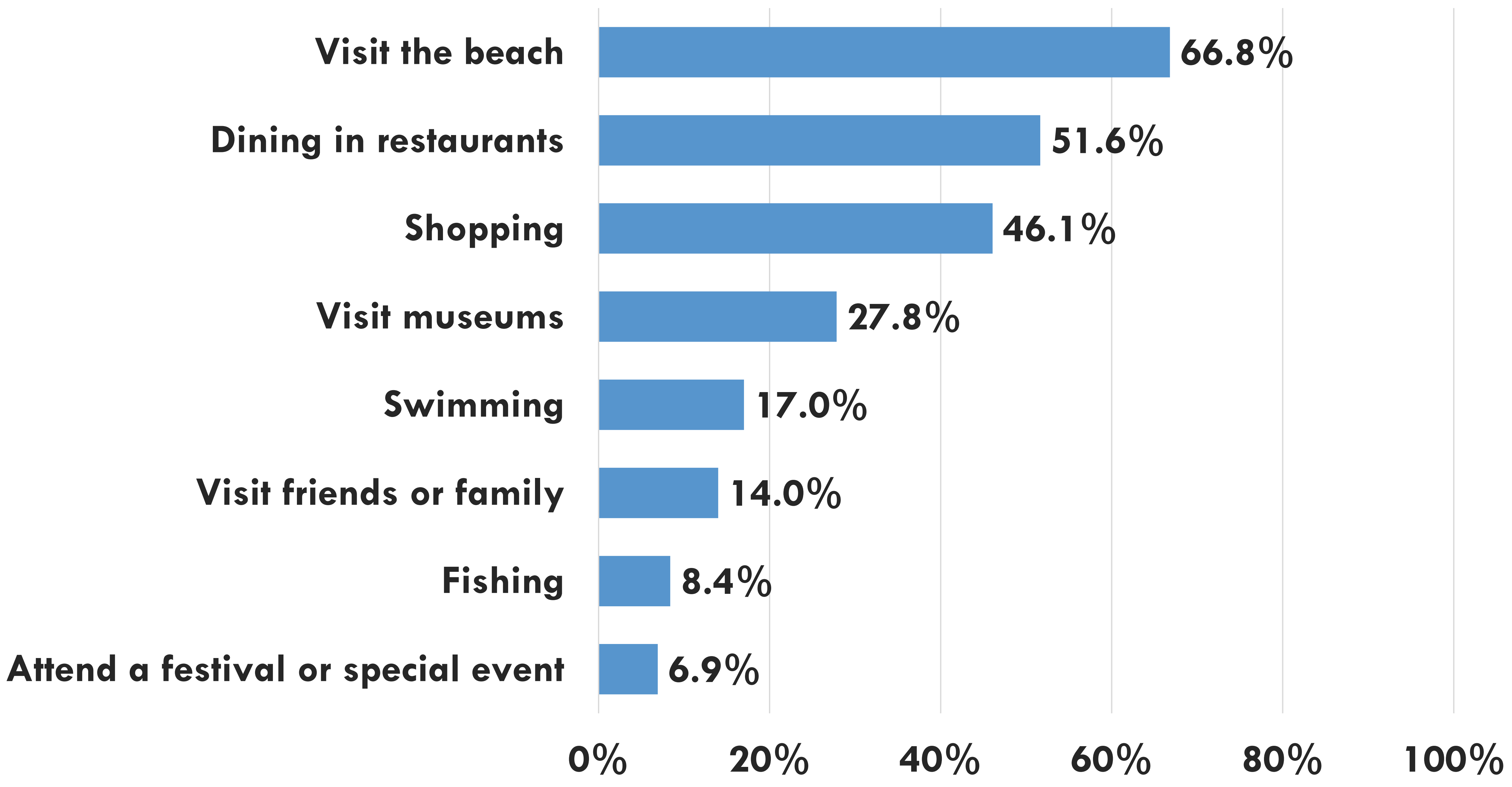
TRIP ACTIVITIES

Visiting the beach (66.8%) surpassed dining in restaurants (51.6%) as the leading visitor activity in St. Pete/Clearwater in Q4 2022. Shopping continued to rank third (46.1%).

Presented with a list of 25 activities, visitors selected the activities in which they engaged. 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



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. 1,391 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Visit the beach	77.4%	72.8%	58.0%
Dining in restaurants	67.0%	77.1%	38.0%
Shopping	60.2%	64.1%	33.7%
Visit museums	33.3%	43.2%	24.2%
Swimming	17.5%	31.3%	11.2%
Visit friends or family	8.8%	48.1%	12.8%
Fishing	8.5%	13.7%	7.2%
Attend a festival or special event	5.6%	10.8%	6.6%
Sample Size:	**280**	**196**	**522**

TRIP ACTIVITIES – FULL DETAIL

	Total	Hotel	VFR	Day Trip
Visit the beach	66.8%	**77.4%**	**72.8%**	58.0%
Dining in restaurants	51.6%	**67.0%**	**77.1%**	38.0%
Shopping	46.1%	**60.2%**	**64.1%**	33.7%
Visit museums	27.8%	**33.3%**	**43.2%**	24.2%
Swimming	17.0%	17.5%	**31.3%**	11.2%
Visit friends or family	14.0%	8.8%	**48.1%**	12.8%
Fishing	8.4%	8.5%	**13.7%**	7.2%
Attend a festival or special event	6.9%	5.6%	**10.8%**	6.6%
Guided tour	4.7%	7.2%	7.8%	1.2%
Bars/Nightlife	4.7%	8.5%	8.6%	1.6%
Other boating	4.2%	7.1%	4.4%	1.6%
Golf	3.5%	4.7%	5.6%	2.3%
Attend or participate in a sporting event	3.4%	3.1%	1.9%	**4.0%**
Shelling	3.4%	5.1%	1.0%	2.8%
Take a dining cruise	3.0%	2.6%	0.5%	**3.4%**
Sailing	2.4%	3.2%	4.0%	2.3%
Photography	2.4%	3.4%	3.0%	1.7%
Jet skiing	2.1%	1.8%	0.9%	**2.2%**
Biking	1.9%	2.1%	3.8%	1.3%
Kayaking/Canoeing	1.0%	1.8%	**3.7%**	0.3%
Bird watching	0.9%	1.8%	0.3%	0.4%
Parasailing	0.8%	1.4%	0.7%	0.3%
Visit breweries and/or distilleries	0.7%	0.3%	0.3%	0.6%
Paddle boarding	0.4%	1.1%	1.4%	0.0%
Baseball Spring Training	0.2%	0.0%	0.0%	0.3%
Sample Size:	**1,391**	**280**	**196**	**522**

Differences seen amongst visitor types:

- VFRs and hotel guests were more likely than day trippers to have visited the beach, dined in restaurants, shopped, and visited museums than day-trippers in Q4 2022.
- Besides visiting friends/family, VFRs were the likeliest segment to have gone swimming (31.3%), fishing (13.7%), or attended a festival/special event (10.8%).
- Day trippers, probably because they spend less time in the area on a particular trip, usually trailed the other segments, except they were more inclined than hotel guests or VFRs to attend/participate in a sporting event (4.0%) or jet ski (2.2%).

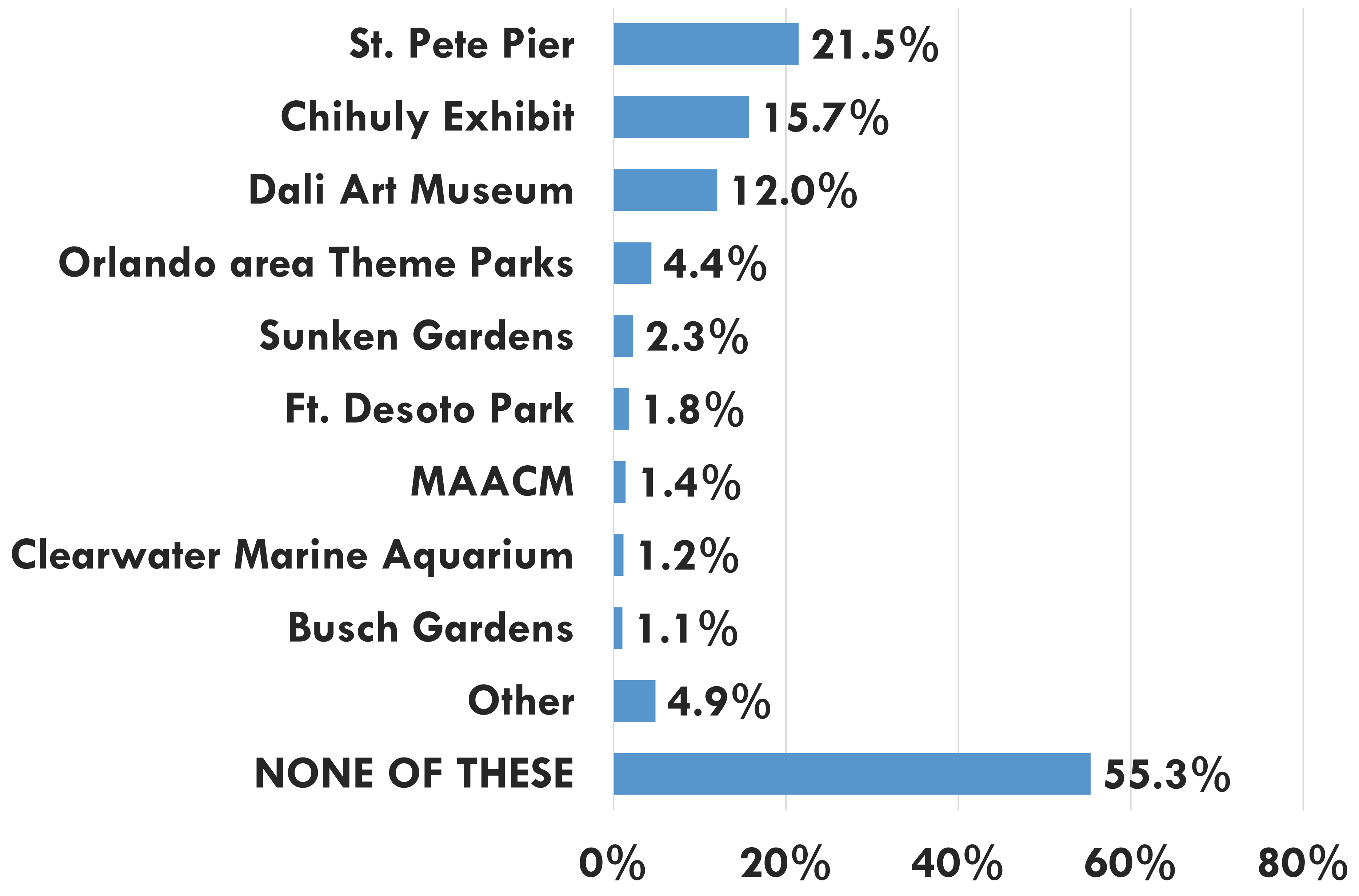
Question: Which of these activities did you, or will you, participate in while in the St. Pete/Clearwater area? (Select all that apply)

Base: All Respondents. 1,391 responses.

ATTRACTIONS VISITED

The top St. Pete/Clearwater attractions are St. Pete Pier (21.5%), Chihuly Exhibit (15.7%), and the Dali Museum (12.0%). Similar to last year, VFRs were the likeliest segment to have visited the St. Pete Pier (36.3%) and the Chihuly Exhibit (26.7%). VFRs were also more likely than others to visit the Sunken Gardens (6.8%) and Ft. Desoto Park (6.7%). Meanwhile, Hotel guests show higher interest than other segments in the Dali Art Museum (20.2%). Day trippers always trail at least one of the other segments and usually both.

Figure 18: Attractions Visited



Question: Which of these attractions did you (or will you) visit while on this trip? (Select all that apply) Base: All Respondents. 1,391 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
St. Pete Pier	27.9%	**36.3%**	16.5%
Chihuly Exhibit	19.6%	**26.7%**	12.8%
Dali Art Museum	**20.2%**	13.3%	8.1%
Orlando area Theme Parks	4.3%	1.6%	4.3%
Sunken Gardens	2.4%	**6.8%**	1.0%
Ft. Desoto Park	2.9%	**6.7%**	0.3%
Museum of the American Arts & Crafts Movement	**3.9%**	1.7%	0.6%
Clearwater Marine Aquarium	2.4%	2.3%	0.2%
Busch Gardens	1.0%	2.2%	0.7%
Other	7.9%	5.7%	3.9%
NONE OF THESE	48.2%	41.0%	60.1%
Sample Size:	**280**	**196**	**522**

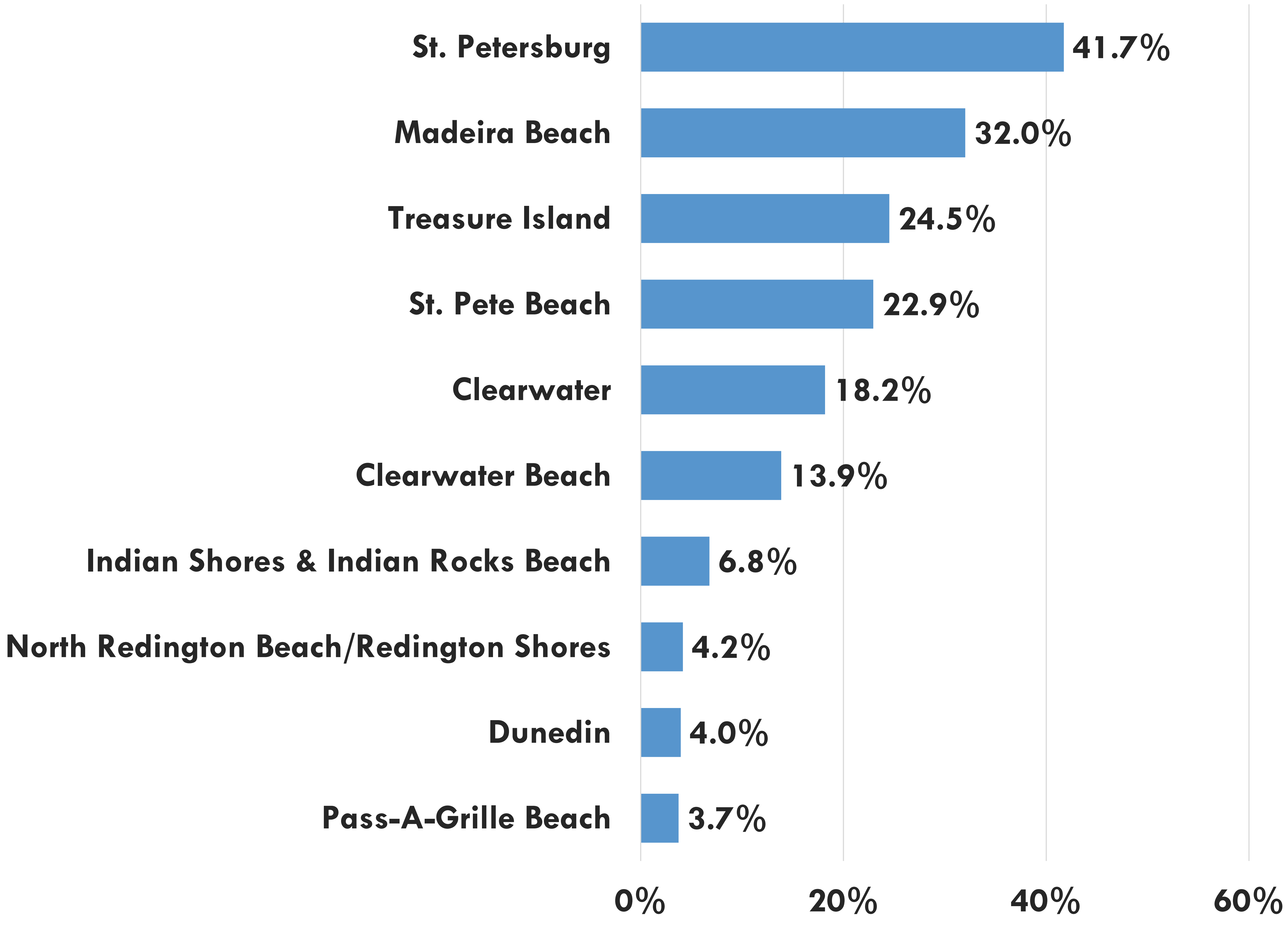
TOP COMMUNITIES VISITED

In Q4 2022, the most common communities visited were St. Petersburg (41.7%) and Madeira Beach (32.0%), the same top two mentioned in Q4 2021, although both recede from the prior year levels (52.7% and 42.0%, respectively). Treasure Island ranks third (24.5%, up from 15.2%), overtaking St. Pete Beach (22.9%, from 19.5%), Clearwater (18.2%, from 18.0%), and especially Clearwater Beach (13.9%, from 41.1%, marking a substantial drop from Q4 2021).

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

Question: Which of the following communities in the St. Pete/Clearwater area did you visit? (Show list. Select all that apply) Base: All Respondents. 1,391 responses.

Figure 19: Top Communities Visited



COMMUNITIES VISITED – FULL DETAIL

	Total	Hotel	VFR	Day Trip
St. Petersburg	41.7%	42.6%	**62.5%**	38.2%
Madeira Beach	32.0%	34.7%	**42.1%**	23.6%
Treasure Island	24.5%	**25.3%**	24.9%	22.0%
St. Pete Beach	22.9%	30.1%	**41.9%**	16.0%
Clearwater	18.2%	13.3%	13.3%	**22.1%**
Clearwater Beach	13.9%	20.7%	**29.0%**	5.8%
Indian Shores & Indian Rocks Beach	6.8%	3.3%	**20.6%**	2.1%
North Redington Beach/Redington Shores	4.2%	3.5%	**14.2%**	0.5%
Dunedin	4.0%	4.4%	**7.7%**	2.5%
Pass-A-Grille Beach	3.7%	5.4%	**10.9%**	1.5%
Largo	3.1%	2.7%	**8.4%**	2.9%
Seminole	2.7%	1.4%	**4.1%**	2.4%
Tarpon Springs	2.5%	2.4%	**10.3%**	0.9%
Pinellas Park	2.0%	2.5%	**3.9%**	1.7%
Gulfport	1.4%	0.7%	**3.0%**	1.1%
Palm Harbor	0.8%	1.1%	1.1%	0.5%
Tierra Verde	0.7%	0.0%	**1.8%**	0.7%
Safety Harbor	0.5%	0.3%	0.3%	0.5%
Oldsmar	0.3%	0.0%	**0.9%**	0.3%
Sample Size:	**1,391**	**280**	**196**	**522**

Interesting differences seen amongst visitor types:

- VFRs continued to be the likeliest segment to have visited most of the Pinellas County communities.
- Hotel guests were slightly more likely than other segments to visit Treasure Island (25.3%), the only community in which they lead.
- A larger share of day trippers visited Clearwater (22.1%) than those in other segments.

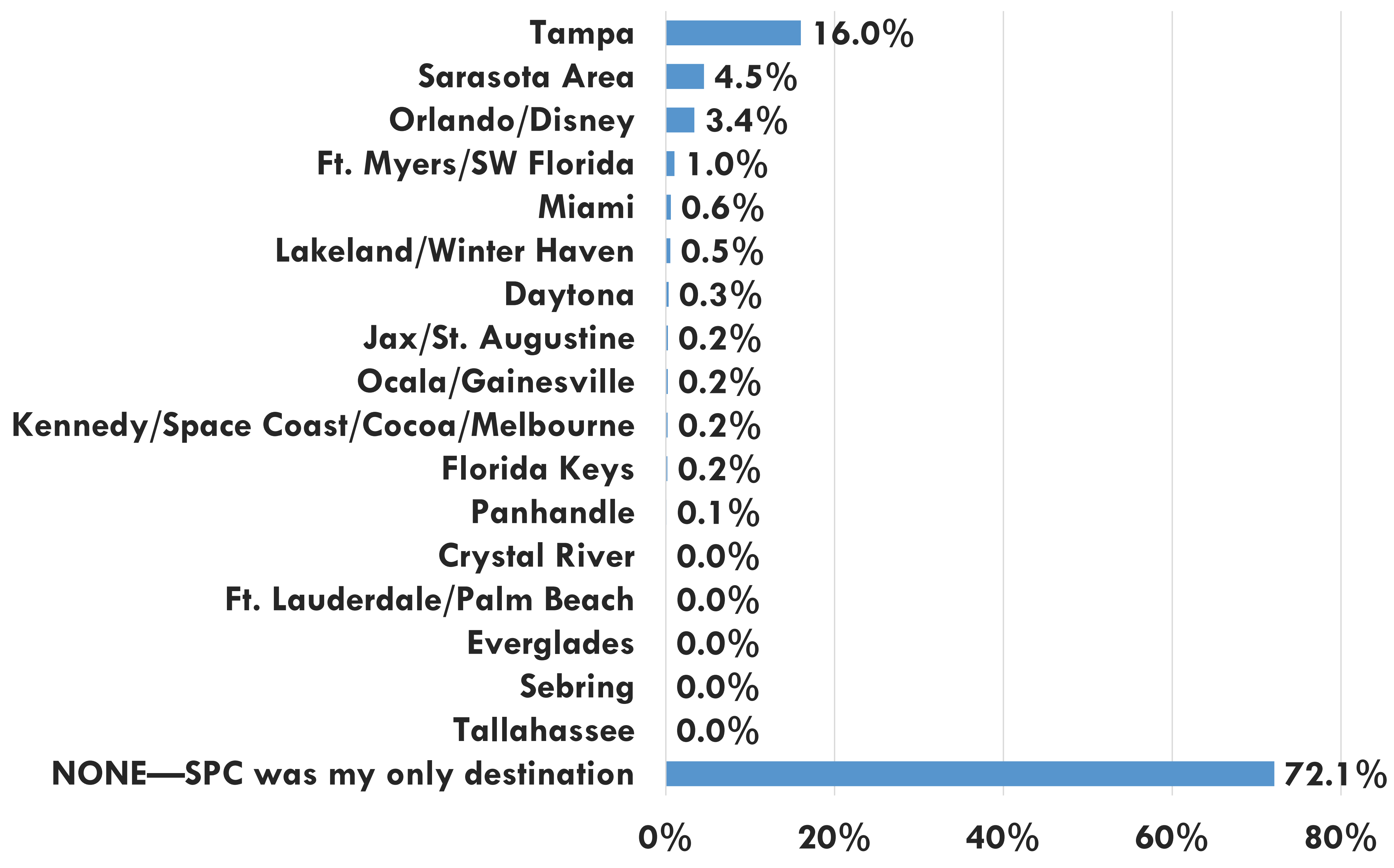
Question: Which of the following communities in the St. Pete/ Clearwater area did you visit? (Show list. Select all that apply)

Base: All Respondents. 1,391 responses.

OTHER DESTINATIONS VISITED

St. Pete/Clearwater was the only destination for nearly three-quarters of visitors in Q4 2022, up from a year ago (50%). Of competitors, travelers were likeliest to have also included Tampa (16.0%), Sarasota (4.5%), and/or Orlando/Disney (3.4%) on their trip, the same top three as in the past. However, each of these place at a lower level than in Q4 2021 (27.5%, 10.8%, and 6.5%, respectively) impacted by the larger share who came just for St. Petersburg/Clearwater.

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



Question: Which of these other destinations did you visit while on this trip? (Select all that apply) Base: All Respondents. 1,391 responses.

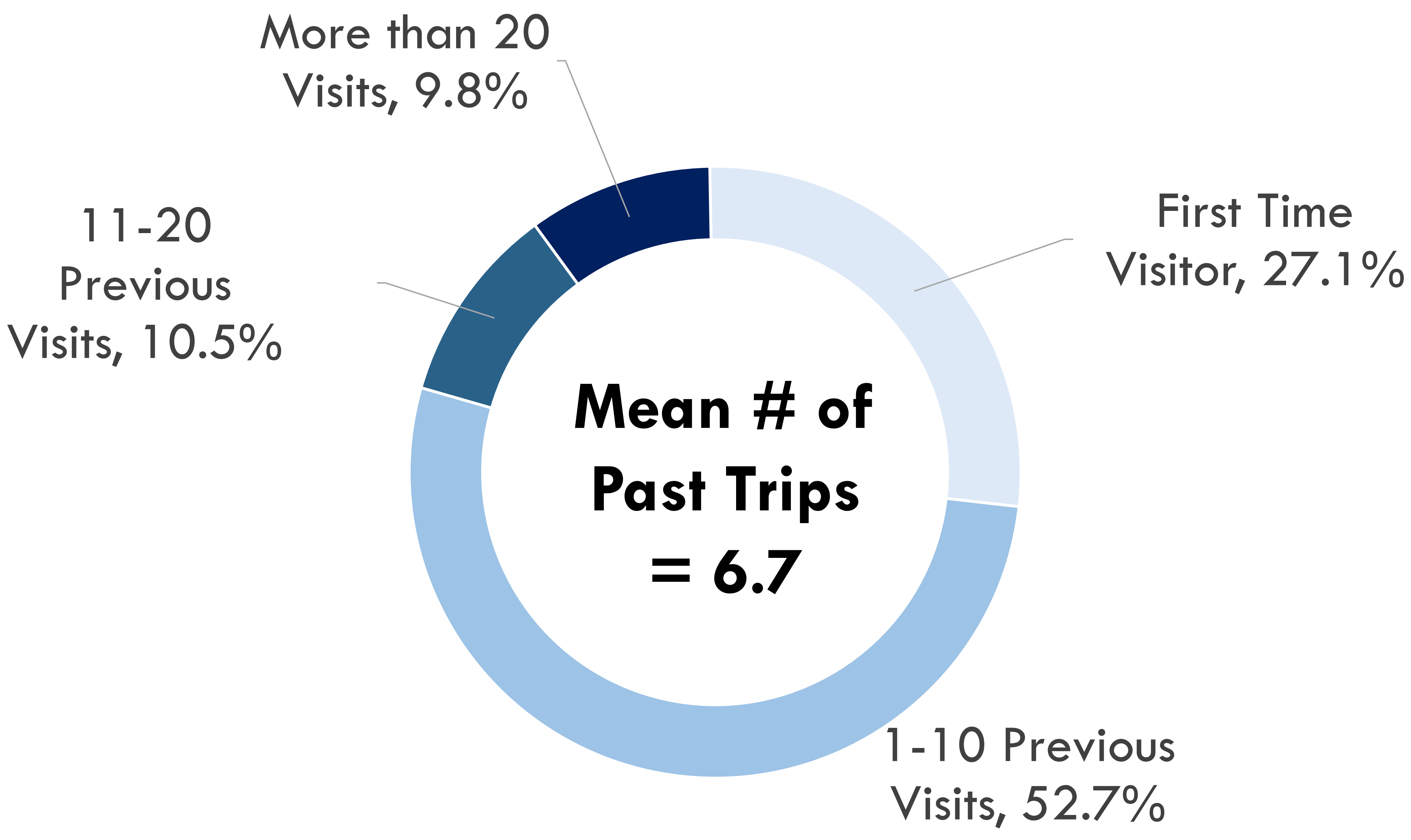
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Tampa	9.1%	24.6%	16.4%
Sarasota Area	3.7%	3.9%	5.0%
Orlando/Disney	3.6%	1.4%	3.1%
Ft. Myers/SW Florida	0.0%	1.0%	1.4%
Miami	0.4%	1.4%	0.6%
Lakeland/Winter Haven	0.8%	0.0%	0.6%
Daytona	0.0%	0.0%	0.4%
Jax/St. Augustine	0.0%	0.3%	0.4%
Ocala/Gainesville	0.3%	0.0%	0.1%
Kennedy/Space Coast/Cocoa/Melbourne	0.0%	0.0%	0.3%
Florida Keys	0.0%	0.0%	0.0%
Panhandle	0.4%	0.0%	0.0%
Crystal River	0.0%	0.0%	0.0%
Ft. Lauderdale/Palm Beach	0.0%	0.0%	0.0%
Everglades	0.0%	0.3%	0.0%
Sebring	0.0%	0.0%	0.0%
Tallahassee	0.0%	0.0%	0.0%
NONE—The St. Petersburg/Clearwater area was my only destination on this trip	80.4%	67.7%	71.0%
Sample Size:	**280**	**196**	**522**

PREVIOUS VISITATION TO ST. PETE/CLEARWATER

In Q4 2022, more than a quarter of visitors were in the St. Pete/Clearwater area for the first time (27.1%), a larger share than a year ago (18.6%). Further, the average number of past visits declines (6.7 from 11.8). Amongst the visitor segments, Hotel guests were most likely be there for the first time (39.1%, up from 29.9% in Q4 2021) and they also noted the fewest past trips (4.2). Day trippers surpassed VFRs in claiming the largest number of past visits (9.0 vs. 5.7) compared to a year ago (13.8 day trippers; 16.2 VFRs).

Figure 21: Previous Visitation to the St. Pete/Clearwater Area



Question: Prior to this visit, how many times have you been to the St. Pete/Clearwater area?
Base: All Respondents. 910 responses.

Detail by Traveler Segment

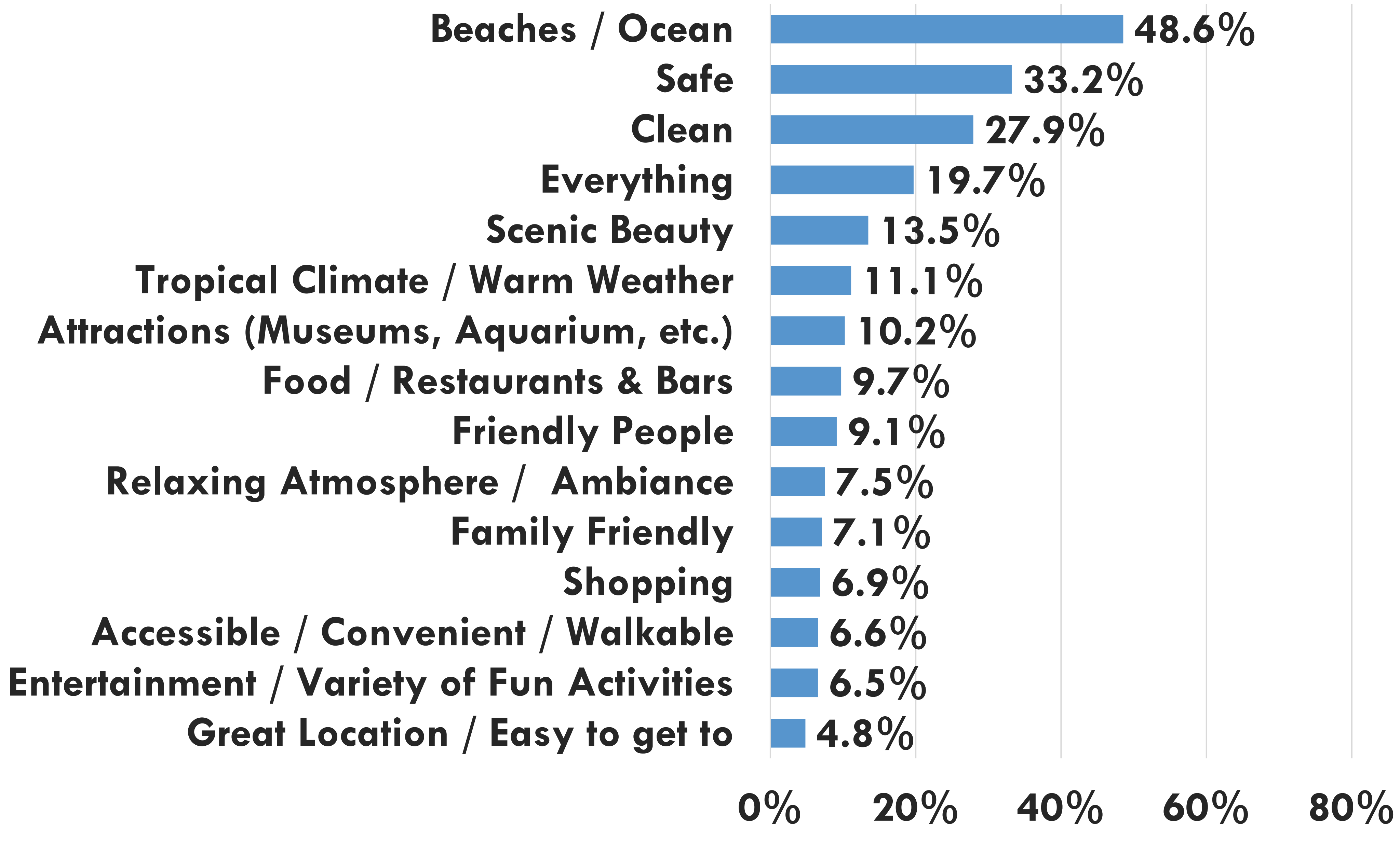
	Hotel	VFR	Day Trip
First-time Visitors	39.1%	28.1%	21.2%
1-10 Previous Visits	48.2%	55.7%	51.1%
11-20 Previous Visits	8.1%	9.0%	12.4%
More than 20 Previous Visits	4.6%	7.2%	15.2%
Mean	**4.2**	**5.7**	**9.0**
Sample Size:	**204**	**169**	**220**

Visitor Satisfaction

MOST LIKED ASPECTS OF ST. PETE/CLEARWATER

As in prior years, St. Pete/Clearwater beaches remained the most liked aspect of the area, cited by half (48.6%, similar to 52.5% a year ago). Safety (33.2%), cleanliness (27.9%), and "everything" (19.7%) follow. Day trippers (50.5%) and Hotel guests (47.9%) were the likeliest segments to vote for the beaches. Day trippers more often favored safety (40.9%) and cleanliness (32.6%), Hotel guests cited the attractions (12.2%), and VFRs just say "everything" (35.8%), which includes many strengths of the St. Pete/Clearwater area.

Figure 22: Most Liked Aspects of St. Pete/Clearwater (Unaided)



Question: What do you like most about the St. Pete/Clearwater area?
Base: All Respondents. 1,391 responses.

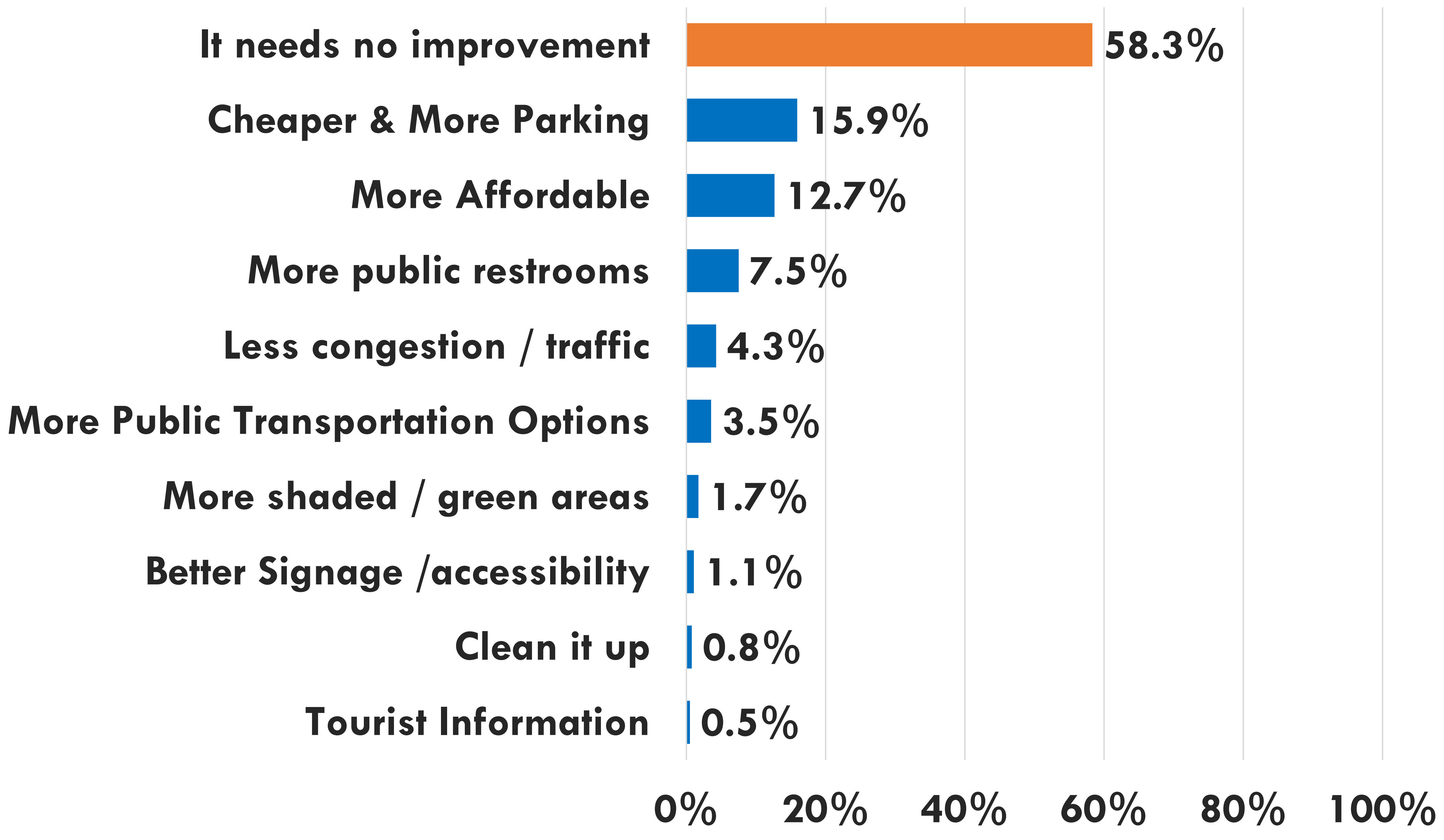
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Beaches / Ocean	**47.9%**	39.6%	**50.5%**
Safe	25.5%	17.0%	**40.9%**
Clean	24.4%	18.4%	**32.6%**
Everything	18.7%	**35.8%**	16.0%
Scenic Beauty	19.4%	11.3%	11.4%
Tropical Climate / Warm Weather	12.8%	15.1%	8.7%
Attractions (Museums, Aquarium, etc.)	**12.2%**	8.5%	10.0%
Food / Restaurants & Bars	9.4%	9.8%	10.1%
Friendly People	10.0%	13.5%	9.0%
Relaxing Atmosphere / Ambiance	7.3%	10.3%	7.3%
Family Friendly	4.5%	7.0%	9.0%
Shopping	5.2%	5.2%	7.7%
Accessible / Convenient / Walkable	11.7%	6.3%	4.5%
Entertainment / Variety of Fun Activities	6.5%	5.8%	6.8%
Great Location / Easy to get to	8.3%	5.8%	2.8%
Sample Size:	**280**	**196**	**522**

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 (58.3%). Of the specific suggestions provided by visitors, the most common were cheaper & more parking (15.9% -- more than double the 6.0% level noted in Q4 2021) and more affordability (12.7%, which was seldom mentioned a year ago at 0.5%). Day trippers continued to be the strongest advocates for cheaper/more parking (19.0%) and have added affordability (14.5%) and more public restrooms (10.1%) to their list.

Figure 23: Additional Attractions or Services (Unaided)



Question: In your opinion, what services or additional attractions would most enhance your experience in the St. Pete/Clearwater Area? Base: All Respondents. 1,391 responses.

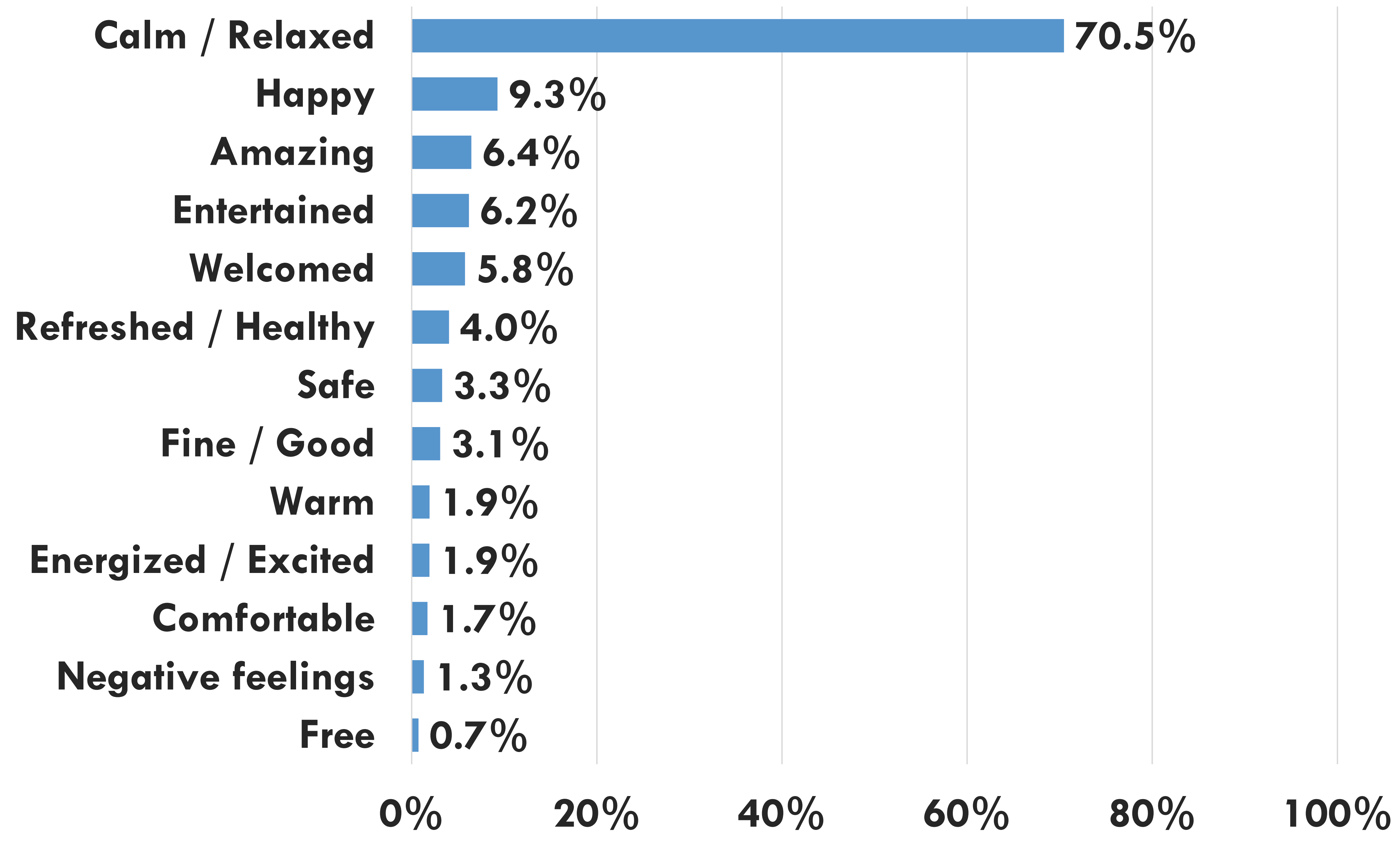
Detail by Traveler Segment

	Hotel	VFR	Day Trip
It needs no improvement	**63.4%**	**65.3%**	53.8%
Cheaper & More Parking	12.0%	9.2%	**19.0%**
More Affordable	11.2%	6.5%	**14.5%**
More public restrooms	3.6%	5.4%	**10.1%**
Less congestion / traffic	4.0%	7.7%	4.0%
More Public Transportation Options	4.3%	1.1%	3.8%
More shaded / green areas	2.1%	1.4%	1.9%
Better Signage /accessibility	1.5%	0.3%	1.2%
Clean it up	1.4%	0.0%	0.6%
Tourist Information	0.8%	0.0%	0.5%
Sample Size:	**280**	**196**	**522**

FEELINGS IN ST. PETE/CLEARWATER

For St. Pete/Clearwater visitors, the area excels at producing feelings of calmness/relaxation (70.5% - up from 45.5% in Q4 2021). Other frequently mentioned positive feelings include happiness (9.3%), amazing (6.4%), entertained (6.2%) and welcomed (5.8%). Nearly equal proportions of hotel guests, VFRs, and day trip visitors felt calm and relaxed while in the destination (ranging from 68.0% to 71.2%). Compared to other segments, more VFRs felt happy (13.6%) and more Hotel guests were amazed (12.5%).

Figure 24: Feelings in St. Pete/Clearwater Area (Unaided)



Question: What one word or phrase best describes how you feel in the St. Pete/Clearwater area? Base: All Respondents. 1,391 responses.

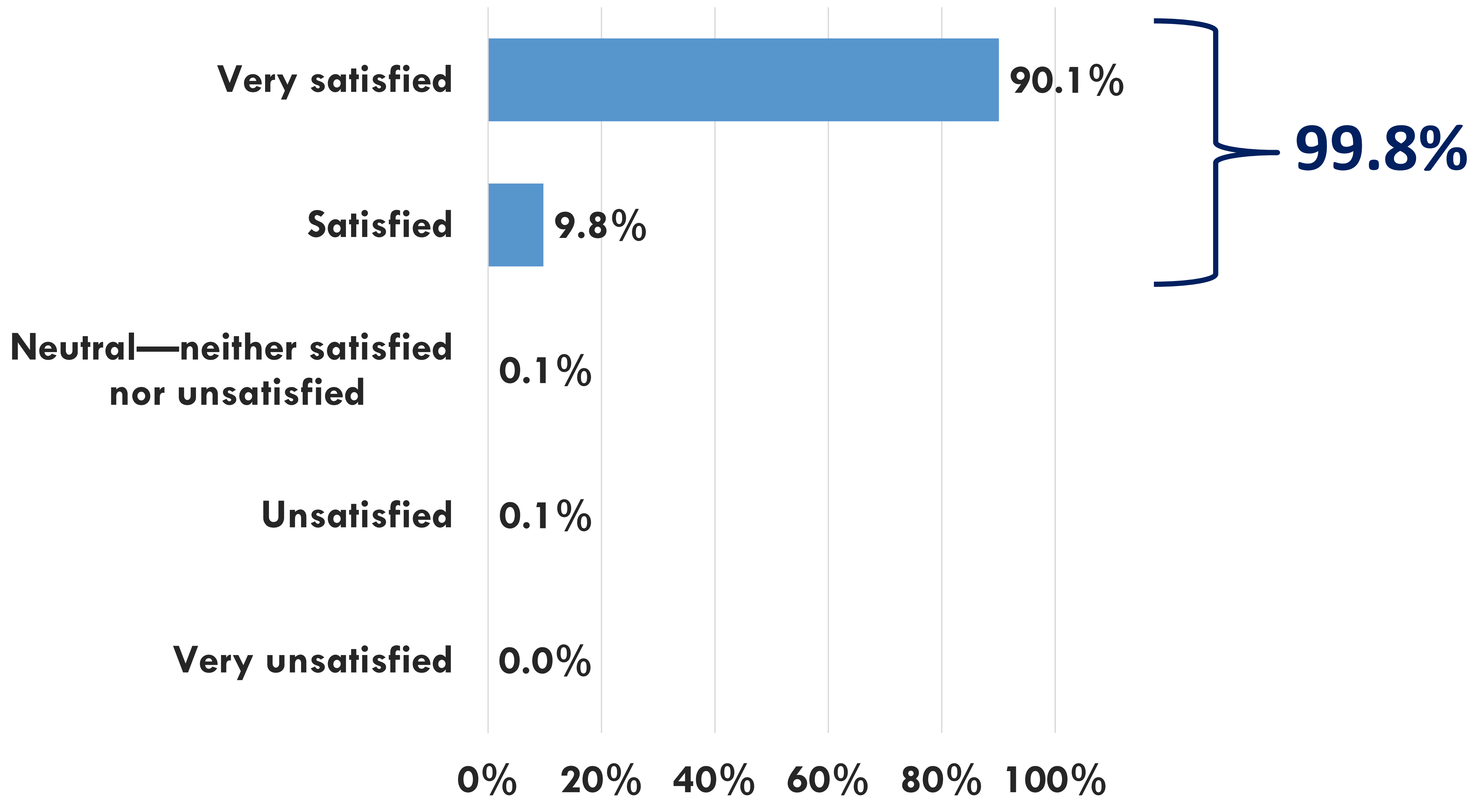
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Calm / Relaxed	**68.2%**	**68.0%**	**71.2%**
Happy	7.5%	**13.6%**	9.3%
Amazing	**12.5%**	5.5%	3.9%
Entertained	7.0%	6.0%	6.5%
Welcomed	6.1%	8.3%	5.5%
Refreshed / Healthy	1.7%	1.0%	5.7%
Safe	1.5%	3.4%	4.1%
Fine / Good	3.3%	3.3%	3.4%
Warm	2.2%	1.8%	1.9%
Energized / Excited	2.2%	2.7%	1.9%
Comfortable	1.1%	1.6%	2.1%
Negative feelings	1.5%	0.0%	1.7%
Free	1.2%	1.8%	0.6%
Sample Size:	**280**	**196**	**522**

OVERALL SATISFACTION

St. Pete/Clearwater continues to deliver an exceptional visitor satisfaction rating (99.8%, similar to last year's 99.5%). Nearly all visitors said they were either "very satisfied" (90.1%) or "satisfied" (9.8%) with their experience in the St. Pete/Clearwater area.

Figure 25: Overall Satisfaction



Question: How satisfied are you with your experience in the St. Pete/Clearwater area on this trip? (Select one) Base: All Respondents. 1,365 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Very satisfied	91.7%	91.6%	88.4%
Satisfied	7.5%	8.4%	11.6%
Neutral—neither satisfied nor unsatisfied	0.4%	0.0%	0.0%
Unsatisfied	0.4%	0.0%	0.0%
Very unsatisfied	0.0%	0.0%	0.0%
Sample Size:	**276**	**194**	**507**

LIKELIHOOD TO RECOMMEND

In line with the high level of satisfaction, St. Pete/Clearwater visitors typically say that they are likely to recommend the area as a travel destination to others. Visitors rated their likelihood to recommend the destination a 9.6 out of 10 (similar to 9.9 in Q4 2021).

Figure 26: Likelihood to Recommend St. Pete/Clearwater Area

Question: How likely are you to recommend the St. Pete/Clearwater area as a place to visit to other travelers? Please use a 10-point scale where 1 represents "Definitely will NOT recommend" and 10 represents "Certain to recommend." Base: All Respondents. 1,377 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
10—Certain to Recommend	72.2%	78.2%	78.5%
9	16.9%	8.8%	10.8%
8	7.6%	11.9%	9.1%
7	2.2%	0.3%	1.6%
6	0.4%	0.9%	0.0%
5	0.4%	0.0%	0.0%
4	0.0%	0.0%	0.0%
3	0.4%	0.0%	0.0%
2	0.0%	0.0%	0.0%
1—Definitely WILL NOT Recommend	0.0%	0.0%	0.0%
Mean Score	**9.6**	**9.6**	**9.7**
Sample Size:	**280**	**194**	**514**

LIKELIHOOD TO RETURN

Further confirming their satisfaction, these visitors also expect 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 9.7 out of 10 (similar to 9.9 in Q4 2021).

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

Question: How likely are you to return to the St. Pete/Clearwater area? Please use a 10-point scale where 1 represents “Definitely will NOT return” and 10 represents “Certain to return.”
Base: All Respondents. 1,353 responses.

Detail by Traveler Segment

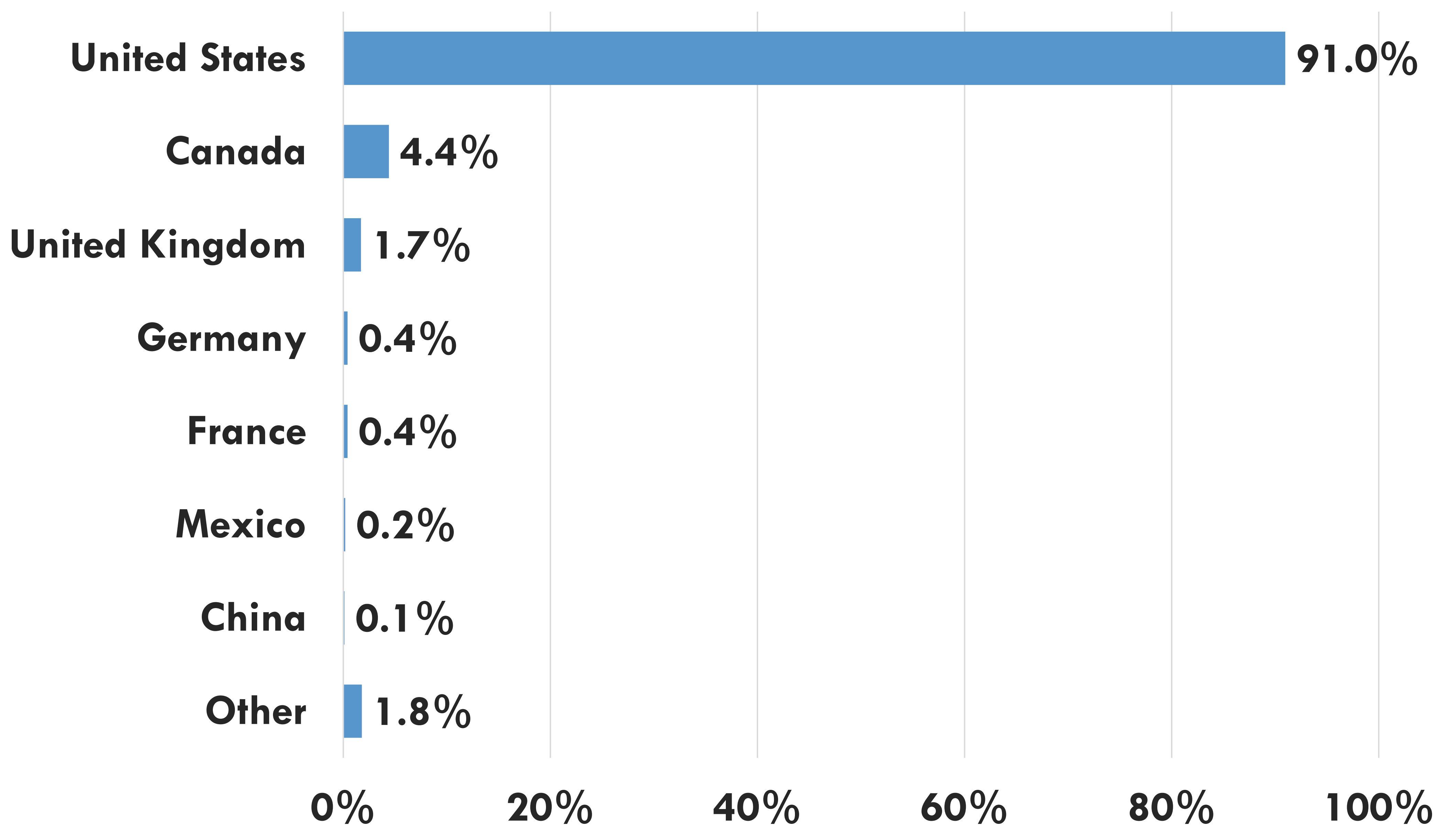
	Hotel	VFR	Day Trip
10—Certain to Return	84.4%	90.8%	81.7%
9	9.4%	3.7%	9.6%
8	4.2%	5.5%	7.5%
7	0.8%	0.0%	1.1%
6	0.8%	0.0%	0.0%
5	0.0%	0.0%	0.2%
4	0.0%	0.0%	0.0%
3	0.4%	0.0%	0.0%
2	0.0%	0.0%	0.0%
1—Definitely WILL NOT Return	0.0%	0.0%	0.0%
Mean Score	**9.7**	**9.9**	**9.7**
Sample Size:	**274**	**191**	**506**

Q4 2022
Point of Origin & Demographic Profile

POINT OF ORIGIN: COUNTRY

The St. Pete/Clearwater area drew somewhat more international visitors in Q4 2022 (9.0%) than in Q4 2021 (3.1%). These international visitors were primarily from Canada (4.4%) and the United Kingdom (1.7%); however, most visitors surveyed live in the US (91.0%).

Figure 28: Country of Origin



Question: In what country do you reside? Base: All Respondents.1,185 responses.

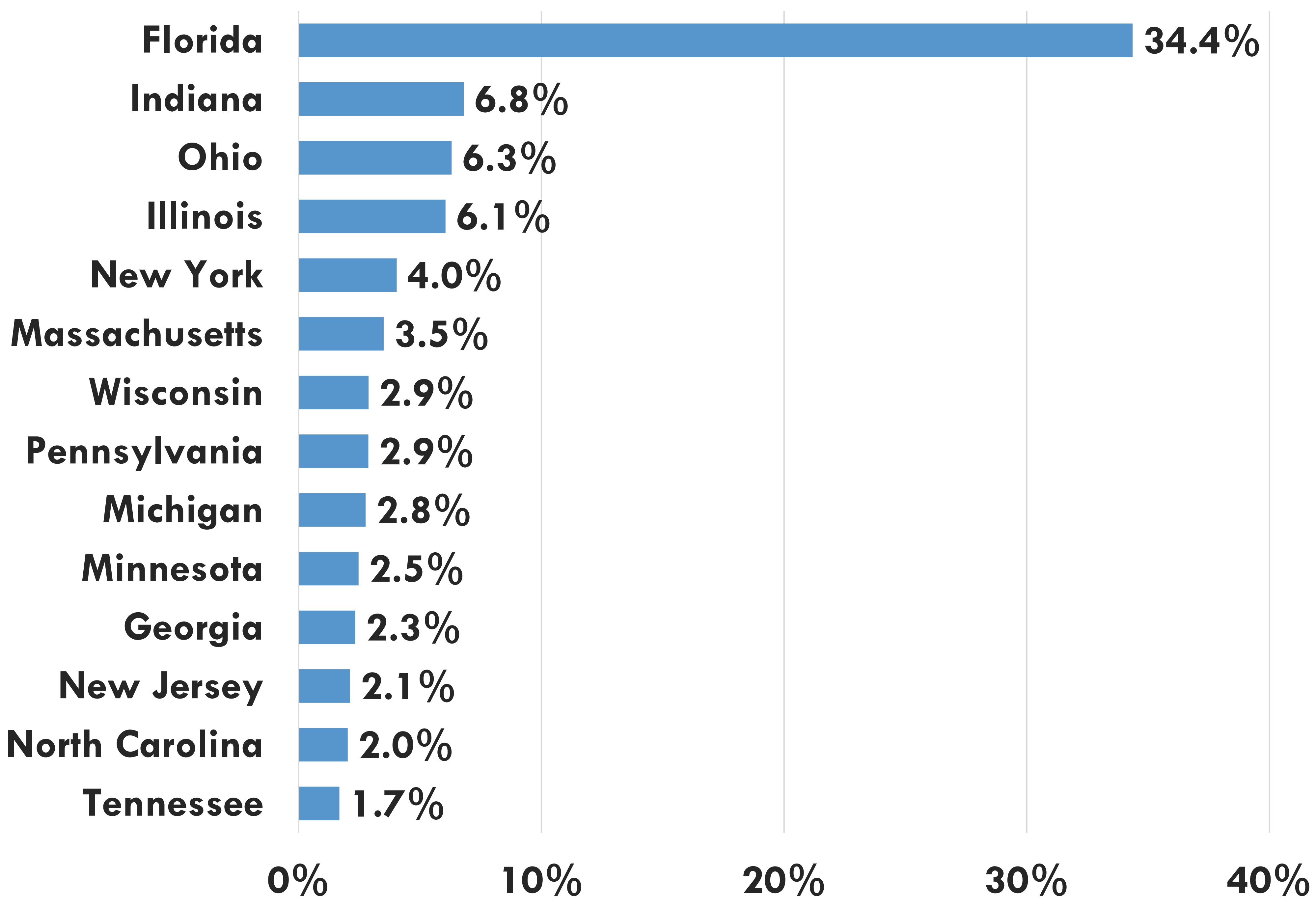
Detail by Traveler Segment

	Hotel	VFR	Day Trip
United States	88.3%	90.1%	93.6%
Canada	5.3%	5.8%	2.6%
United Kingdom	2.6%	0.6%	1.2%
Germany	0.8%	0.0%	0.3%
France	0.9%	0.0%	0.4%
Mexico	0.0%	0.3%	0.2%
China	0.0%	0.0%	0.2%
Other	2.1%	3.2%	1.6%
Sample Size:	**228**	**163**	**446**

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

In addition to drawing more international visitors in Q4 2022, more domestic visitors also came from outside Florida. Two-thirds of surveyed domestic St. Pete/Clearwater area visitors live outside Florida (65.6%, up from 54.4% a year ago). Indiana (6.8%), Ohio (6.3%), Illinois (6.1%), and New York (4.0%) contributed the largest proportions of out-of-state visitors. Not surprisingly, day trippers were the most likely segment to be Florida residents (44.5%, but slips from 62.2% noted a year ago). VFRs were the segment likeliest to be from Indiana (8.4%) and Ohio (10.6%) while Hotel guests were the likeliest to be from the other leading source states of Illinois (6.5%), New York (5.7%), and Massachusetts (5.3%).

Figure 29: State of Origin



Question: What is your zip/postal code? Base: Domestic respondents. 1,173 responses.

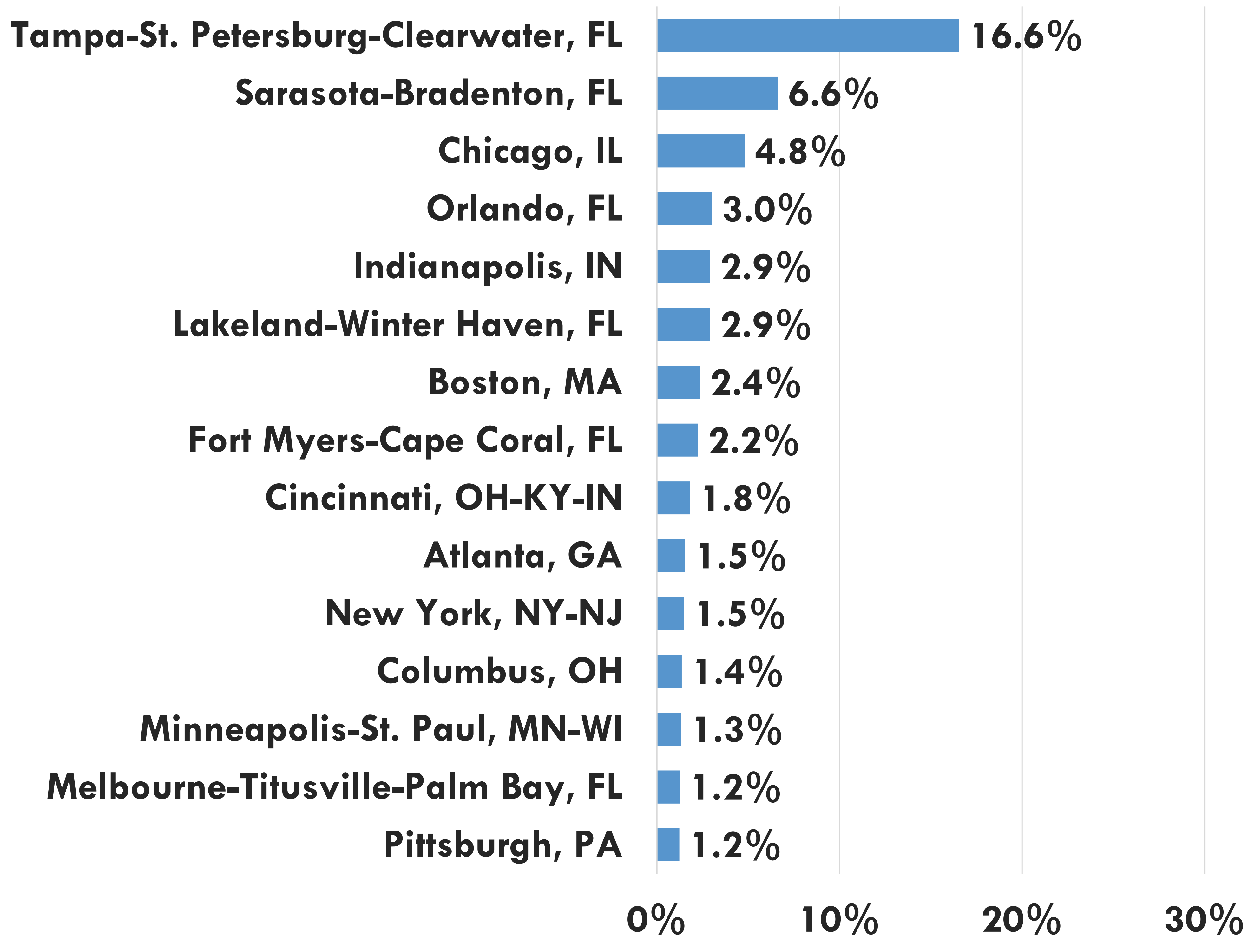
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Florida	**26.1%**	8.1%	**44.5%**
Indiana	6.4%	**8.4%**	6.1%
Ohio	5.8%	**10.6%**	5.0%
Illinois	**6.5%**	5.6%	5.5%
New York	**5.7%**	5.1%	3.3%
Massachusetts	**5.3%**	3.7%	3.1%
Wisconsin	3.4%	3.1%	2.3%
Pennsylvania	4.6%	3.7%	1.5%
Michigan	4.6%	2.9%	2.2%
Minnesota	2.4%	3.9%	2.1%
Georgia	1.2%	4.1%	2.5%
New Jersey	2.1%	2.3%	2.4%
North Carolina	2.0%	2.5%	2.1%
Tennessee	2.4%	0.0%	1.3%
Sample Size:	**241**	**167**	**454**

POINT OF ORIGIN: MSA (DOMESTIC VISITORS)

The top three Florida visitor markets in Q4 2022 continued to be Tampa (16.6%), Sarasota/Bradenton (6.6%) and Orlando (3.0%). Leading out-of-state markets in the fourth quarter of 2022 included Chicago, IL (4.8%), Indianapolis (2.9%), Boston (2.4%), and Cincinnati (1.8%).

Figure 31: MSA



Detail by Traveler Segment

	Hotel	VFR	Day Trip
Tampa-St. Petersburg-Clearwater, FL	4.0%	0.3%	25.0%
Sarasota-Bradenton, FL	1.0%	2.9%	10.0%
Chicago, IL	4.7%	5.4%	4.6%
Orlando, FL	3.4%	2.5%	3.3%
Indianapolis, IN	1.5%	4.8%	3.0%
Lakeland-Winter Haven, FL	2.9%	0.0%	3.7%
Boston, MA	4.2%	1.9%	1.9%
Fort Myers-Cape Coral, FL	2.3%	0.0%	2.5%
Cincinnati, OH-KY-IN	3.5%	1.2%	1.2%
Atlanta, GA	0.9%	3.5%	1.4%
New York, NY-NJ	2.4%	1.7%	1.2%
Columbus, OH	1.4%	3.1%	0.8%
Minneapolis-St. Paul, MN-WI	2.8%	0.3%	0.8%
Melbourne-Titusville-Palm Bay, FL	2.0%	0.0%	1.2%
Sample Size:	**209**	**139**	**385**

Question: What is your zip/postal code? Base: Domestic respondents. 987 responses.

DEMOGRAPHIC PROFILE

The following presents the demographic profile for all St. Pete/Clearwater area visitors surveyed in Q4 of 2022.

Average Age

50.2 years old

Gender*

Female: 51.4%

Male: 48.1%

Household Income

$100,891

Marital Status

Single: 20.4%

Married/partnered: 73.1%

Children under 18: 8.5%

Ethnicity

Caucasian – 86.7%

Black/African-American – 5.4%

Latino / Hispanic – 4.1%

Orientation

Heterosexual – 93.0%

LGBTQ – 3.1%

Other – 0.7%

**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 Q4 of 2022.

	Hotel	VFR	Day Trip
Female	46.9%	60.5%	51.1%
Male	52.7%	38.6%	48.4%
Mean Age	51.1	51.2	49.3
Single	14.6%	24.9%	22.4%
Married	48.8%	65.4%	70.1%
Has Children	11.5%	9.3%	7.6%
Annual Household Income	$92,309	$94,184	$105,819

	Hotel	VFR	Day Trip
Caucasian	88.5%	89.9%	84.2%
Black/African-American	4.0%	4.7%	6.8%
Latino/Hispanic	2.5%	1.7%	5.5%
Asian/Pacific Islander	1.1%	0.3%	1.2%
American Indian/Alaska Native	0.4%	0.3%	0.3%
Other	1.8%	1.0%	1.1%
Heterosexual	92.7%	93.1%	92.9%
LGBTQ	2.8%	1.1%	3.7%