



CANADA UNITED KINGDOM CENTRAL EUROPE UPDATE

Rosemarie Payne – Visit St. Pete/Clearwater

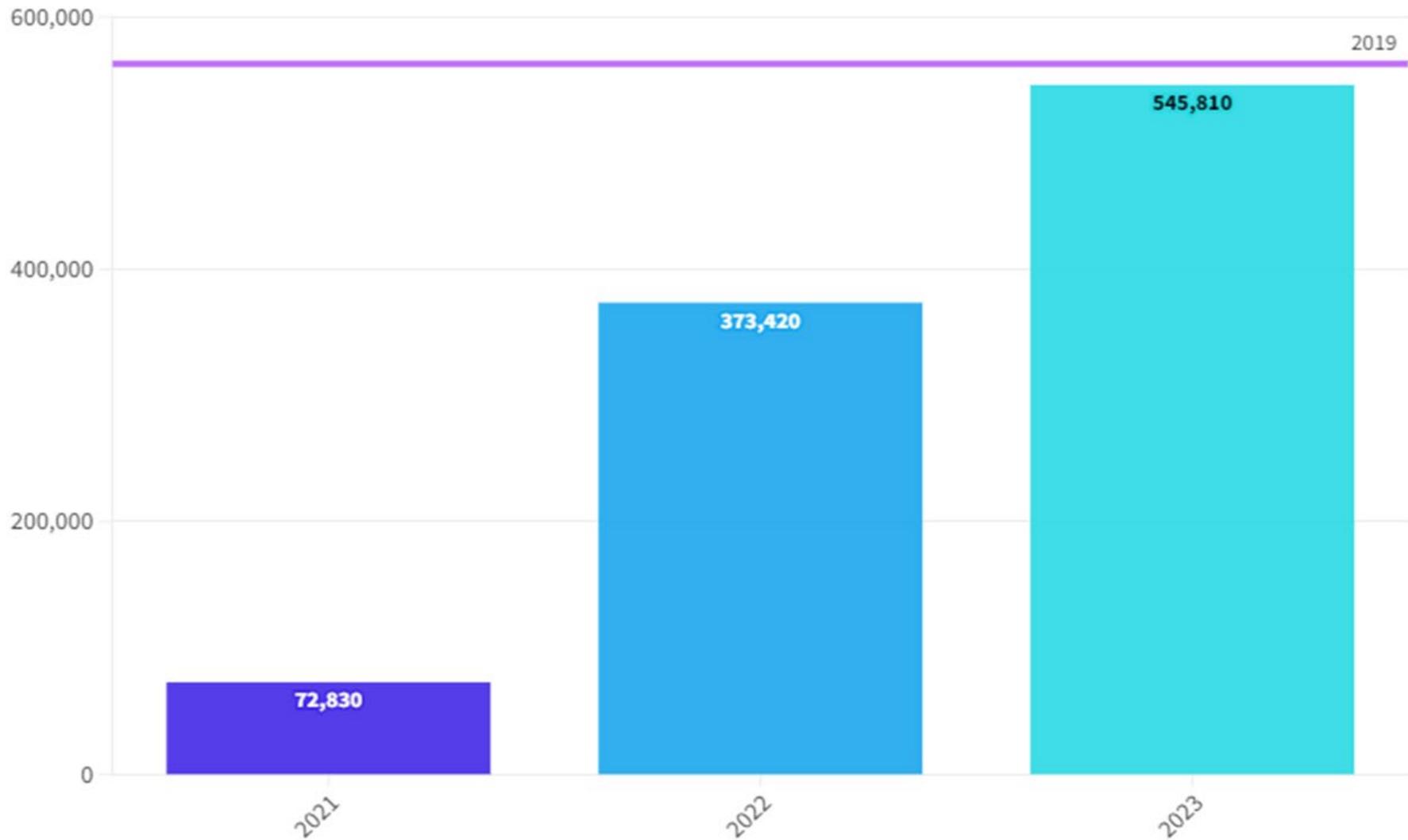
Jayne Brooke – Rooster

Axel Kaus – Kaus Media

CANADA UPDATE



Canada Overnight Visitation to the Tampa-St Pete-Clearwater MSA



Source: Tourism Economics - GCT



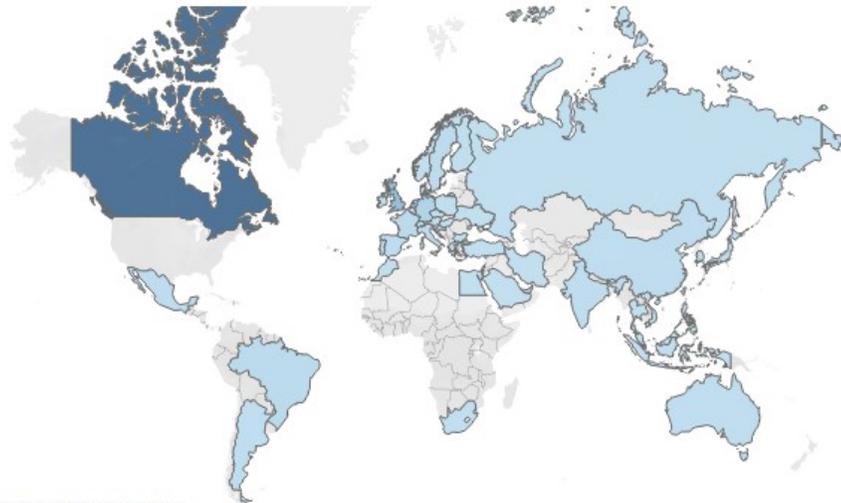
Source Market Details



2023 Tampa-St. Pete., FL Visitor Markets by Overnight Visits

All International, Year-over-year percent change vs. Previous Year; CAGR for 2019 to 2025

Canada	545.8K	▲46.2% YOY	▲1.5% CAGR
United Kingdom	160.3K	▲88.0% YOY	▲2.1% CAGR
Rest of Caribbean	73.5K	▲41.7% YOY	▲5.4% CAGR
Germany	54.7K	▲10.1% YOY	▲5.3% CAGR
Netherlands	24.0K	▲107.5% YOY	▲5.6% CAGR
Brazil	21.5K	▲215.9% YOY	▲3.8% CAGR
Italy	18.5K	▲127.2% YOY	▲4.2% CAGR
France	17.6K	▲105.4% YOY	▲4.9% CAGR
Rest of South Ame..	16.6K	▲1.8% YOY	▲2.8% CAGR
Sweden	12.9K	▲216.5% YOY	▲6.7% CAGR



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2023 Overnight Visits to Tampa-St. Pete., FL



2023 Visitors from Canada to Tampa-St. Pete., FL

Year-over-year percent change vs. Previous Year; CAGR for 2019 to 2025

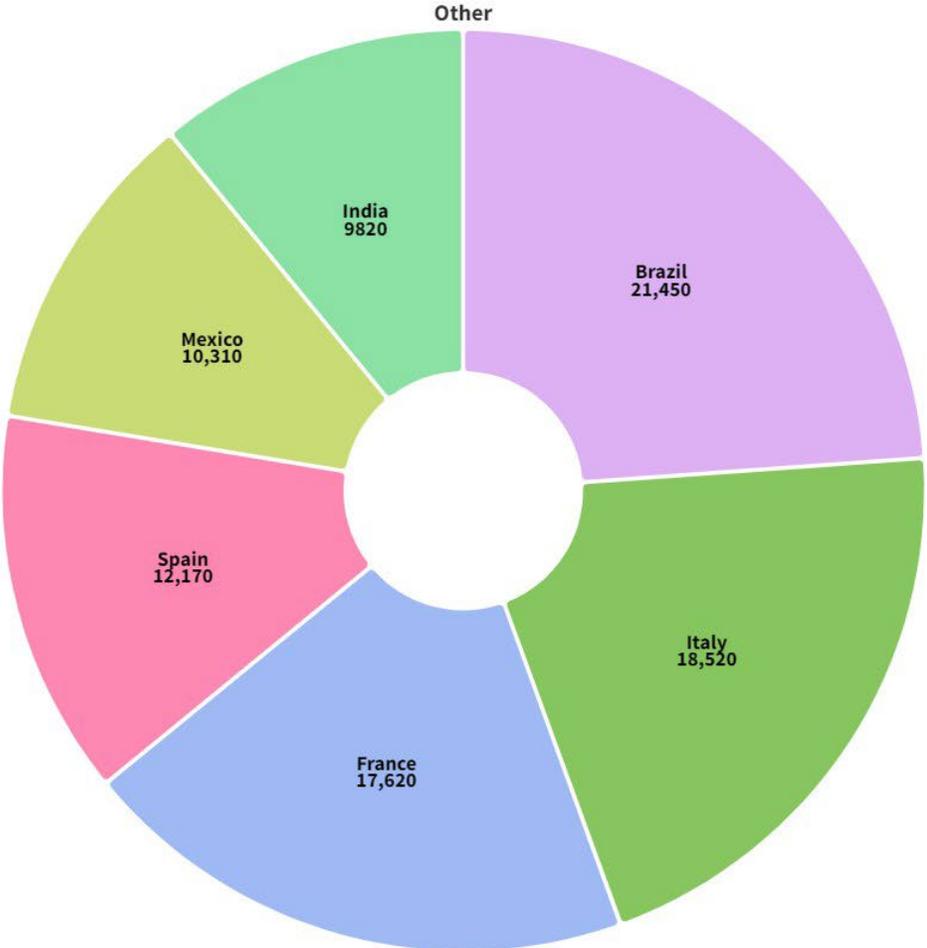
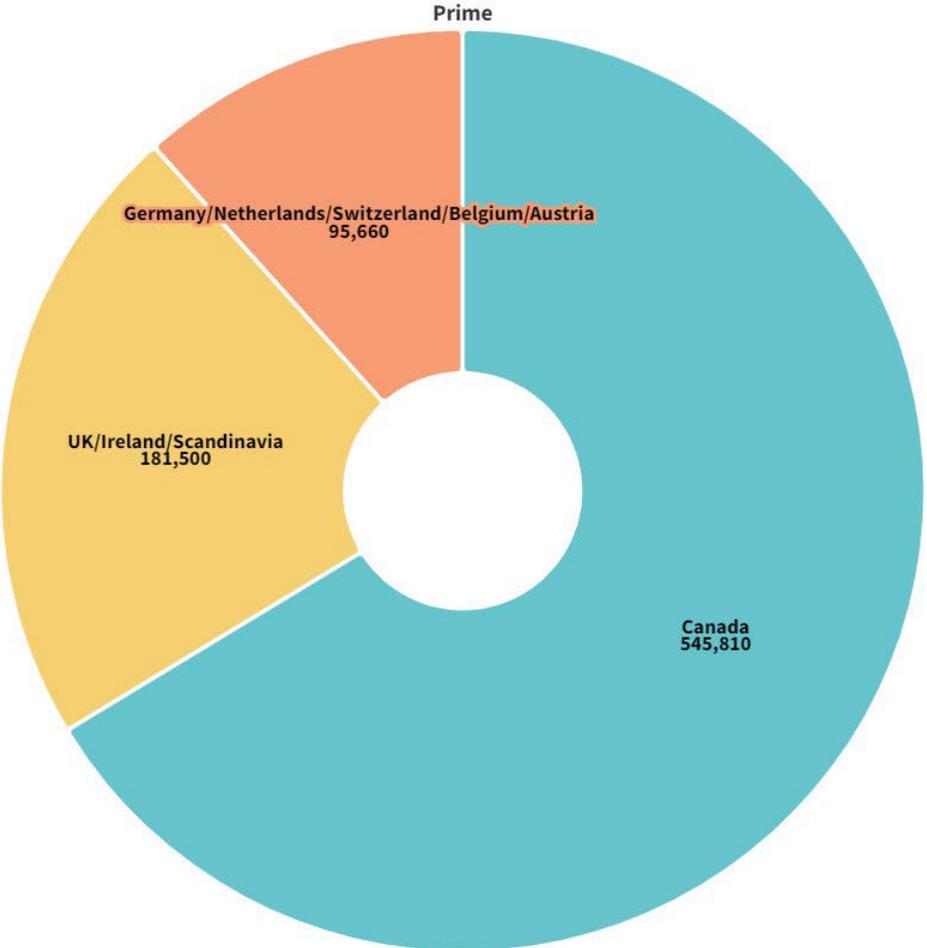


2023 Top United States Destinations for Visitors from Canada

Year-over-year percent change vs. Previous Year

By Overnight Visits			By Nights		
At 545.8K visits, Tampa-St. Pete., FL ranks #9			At 3.2M nights, Tampa-St. Pete., FL ranks #5		
Seattle, WA	1.5M	▲30.6% YOY	Orlando, FL	5.3M	▲48.5% YOY
Las Vegas, NV	1.4M	▲59.6% YOY	Las Vegas, NV	4.7M	▲59.6% YOY
Orlando, FL	1.3M	▲48.5% YOY	New York, NY	3.5M	▲39.1% YOY
New York, NY	906.1K	▲39.1% YOY	Phoenix, AZ	3.5M	▲48.3% YOY
Los Angeles, CA	814.4K	▲38.1% YOY	Tampa-St. Pete., FL	3.2M	▲46.2% YOY
Boston, MA	769.5K	▲27.7% YOY	Los Angeles, CA	3.0M	▲38.1% YOY
Detroit, MI	696.6K	▲37.8% YOY	Seattle, WA	2.9M	▲30.6% YOY
Phoenix, AZ	661.2K	▲48.3% YOY	Boston, MA	2.6M	▲27.7% YOY
Tampa-St. Pete., FL	545.8K	▲46.2% YOY	Miami, FL	2.0M	▲26.7% YOY
Miami, FL	494.3K	▲26.7% YOY	Honolulu, HI	2.0M	▲29.4% YOY

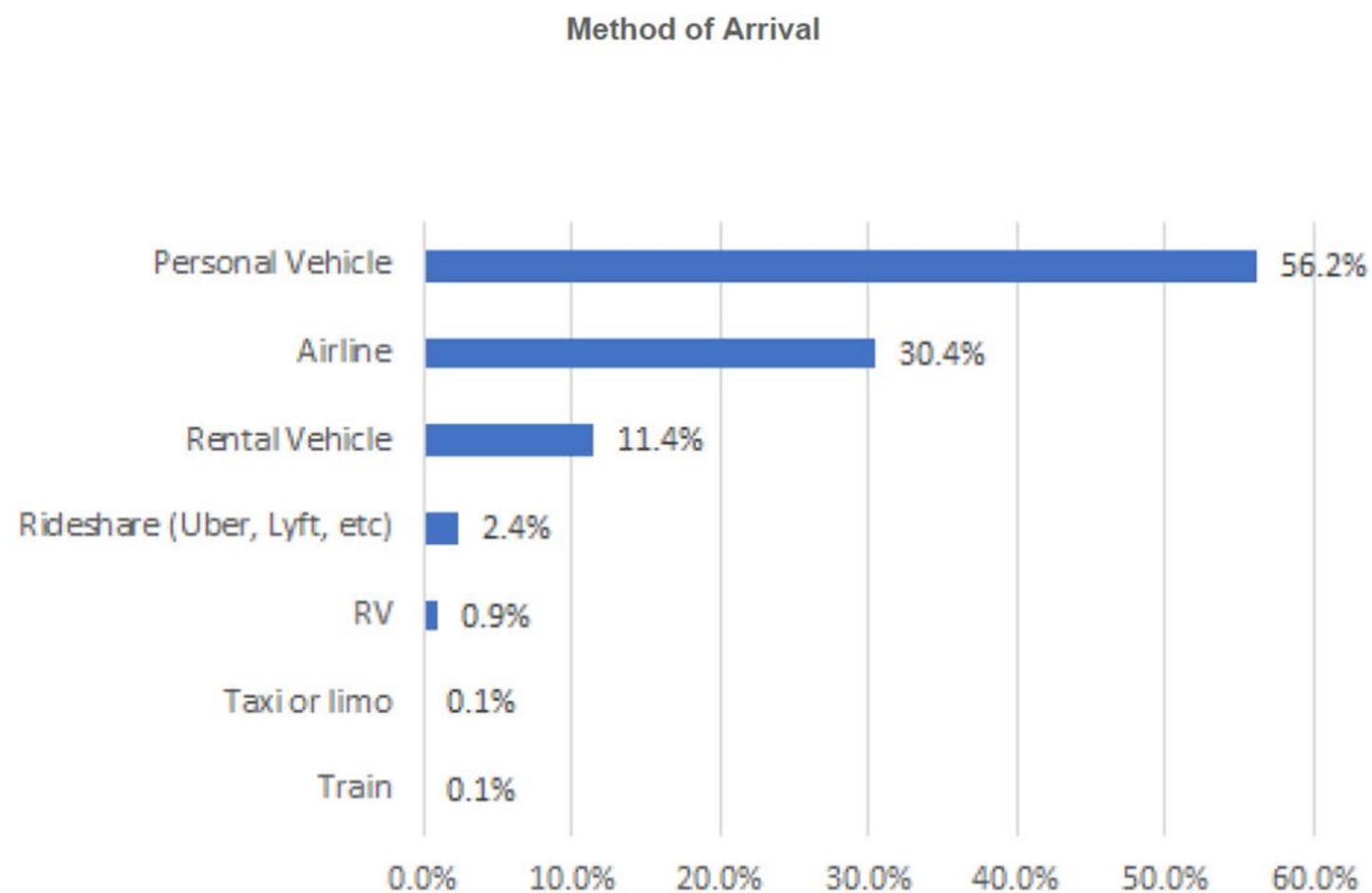
2023 International Overnight Visits to Tampa-St Pete-Clearwater MSA



Source: Tourism Economics - GCT

Country of Origin	Overnight Visits	YOY % Change
Canada	545,810	▲46.2% YOY
United Kingdom	160,280	▲88.0% YOY
Germany	54,650	▲10.1% YOY
Netherlands	23,970	▲107.5% YOY
Brazil	21,450	▲215.9% YOY
Italy	18,520	▲127.2% YOY
France	17,620	▲105.4% YOY
Sweden	12,850	▲216.5% YOY
Switzerland	12,310	▲0.2% YOY
Spain	12,170	▲166.9% YOY
Mexico	10,310	▲63.7% YOY
India	9,820	▲46.3% YOY
Argentina	7,580	▲225.3% YOY
Ireland	3,060	▲170.8% YOY
Denmark	3,020	▼21.4% YOY
Belgium	2,470	▲55.3% YOY
Norway	2,290	▲104.5% YOY
Austria	2,260	▲737.0% YOY
Poland	1,530	▲51.5% YOY
Hungary	1,450	▲57.6% YOY
Finland	1,370	▲85.1% YOY

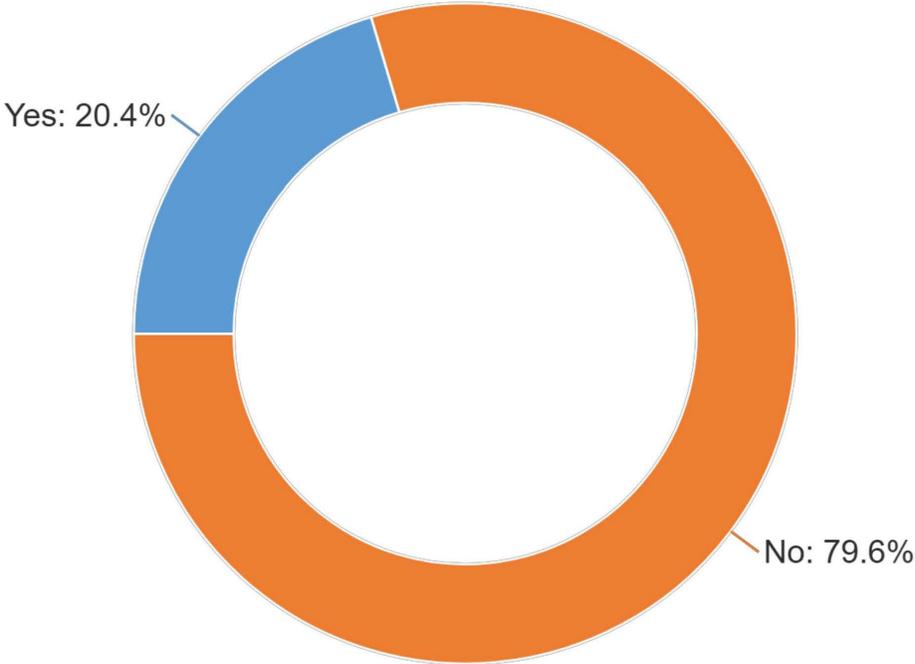
Method of Arrival



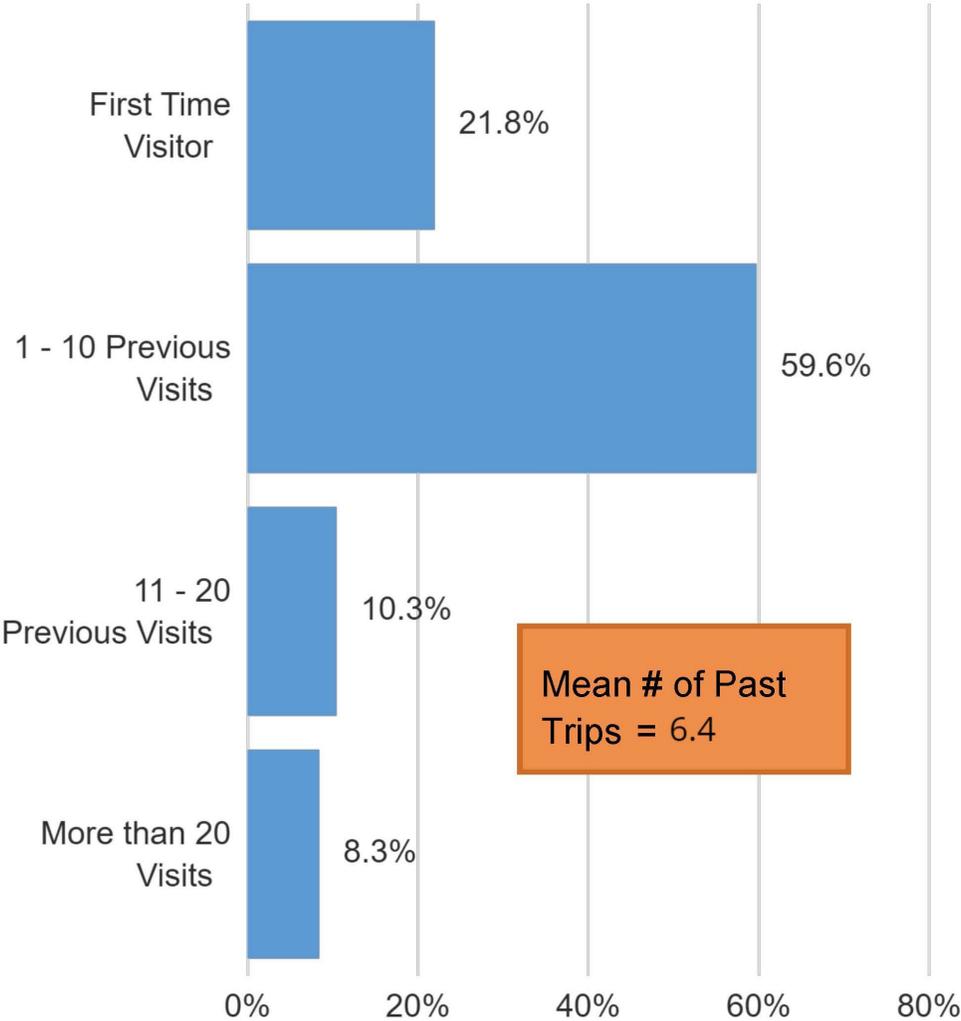
Base: Canada and (2022 OR 2023) 372 responses.

First-Time Visit to Florida / Previous Visitation to St. Pete/Clearwater

First Time Visitors to Florida



Previous Visitation to the St. Pete/Clearwater Area



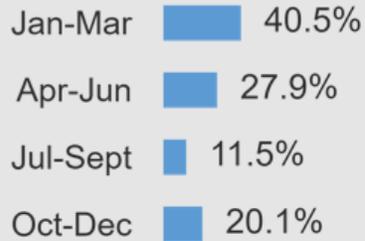
Infographic Profile: Canada and (2022 OR 2023) 372 responses.

Length of Stay



6.5 Days (on average)

Seasonality of Visit



Travel Party Size



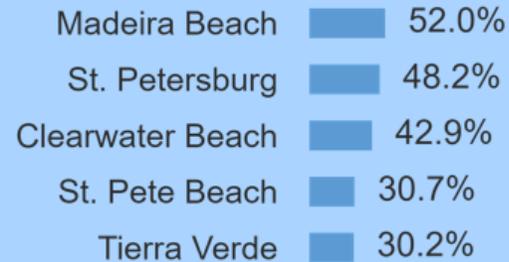
2.3
People

0.2% Traveled with Children

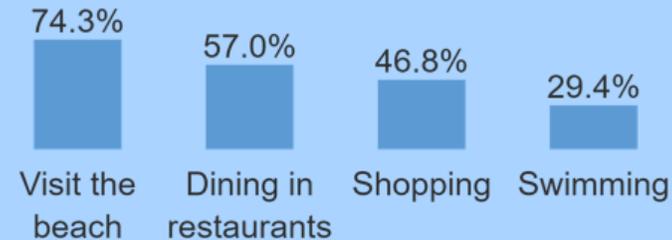
Daily Spending

\$124.71
Per Person

Top Communities Visited



Top Activities



Destination  Analysts

FY23 Key Accomplishments

- Canadian Sales Mission – Calgary, Toronto & Montreal
- BranchUP – Facebook Initiative
- Florida Huddle & IPW Canadian Meetings
- Product Launches with Air Canada Vacations & TravelBrands
- Canadian Automobile Association/Alberta Motor Association FAM
- Hotelbeds Receptive Operator Campaign in Canada



Opportunities & Headwinds

Opportunities

- Nonstop Air Service to TPA
 - ❖ Air Canada – Toronto & Ottawa
 - ❖ WestJet – Toronto & Calgary (Dec.)
 - ❖ Lynx Air – Toronto & Montreal (Nov.)
 - ❖ Porter Air – Toronto

Headwinds

- Increased competition from other FL Destinations, Cruises, Caribbean
- Political Climate
- Canadian Economic Challenges
- Weather/Environmental Issues

Looking Ahead to FY24

- Visit Florida Training Portal
- Brand USA Initiatives (new BUSA Representation in Canada – Casey Canevari)
- IPW Canadian Reception
- Florida Huddle – Miami
- Increased FAM Visits
- Tour Operator Product Launches
- 2 Canadian Sales Missions for April & June 2024

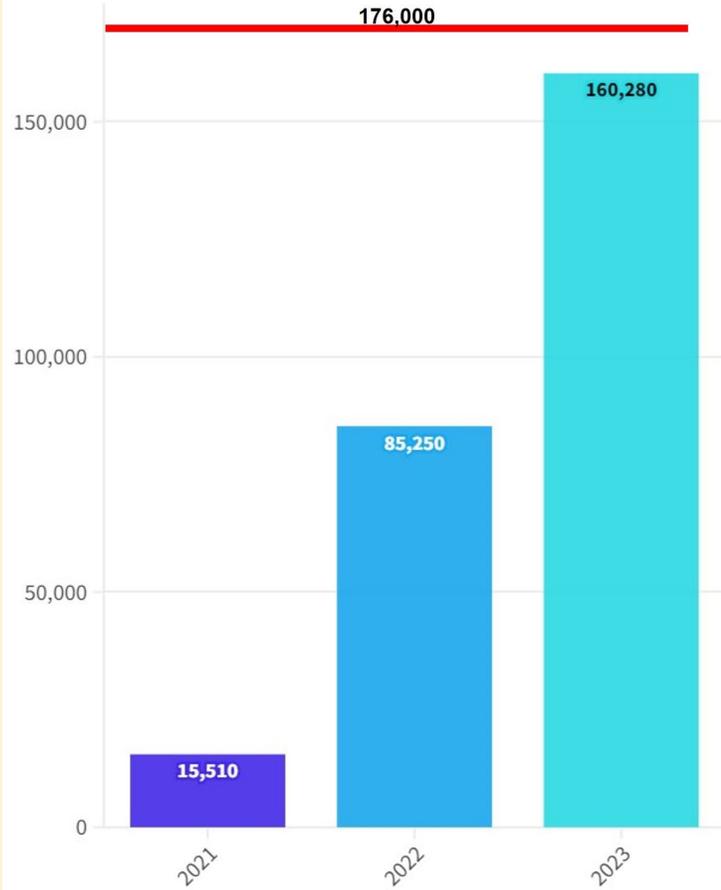


UK/IRELAND SCANDINAVIA UPDATE

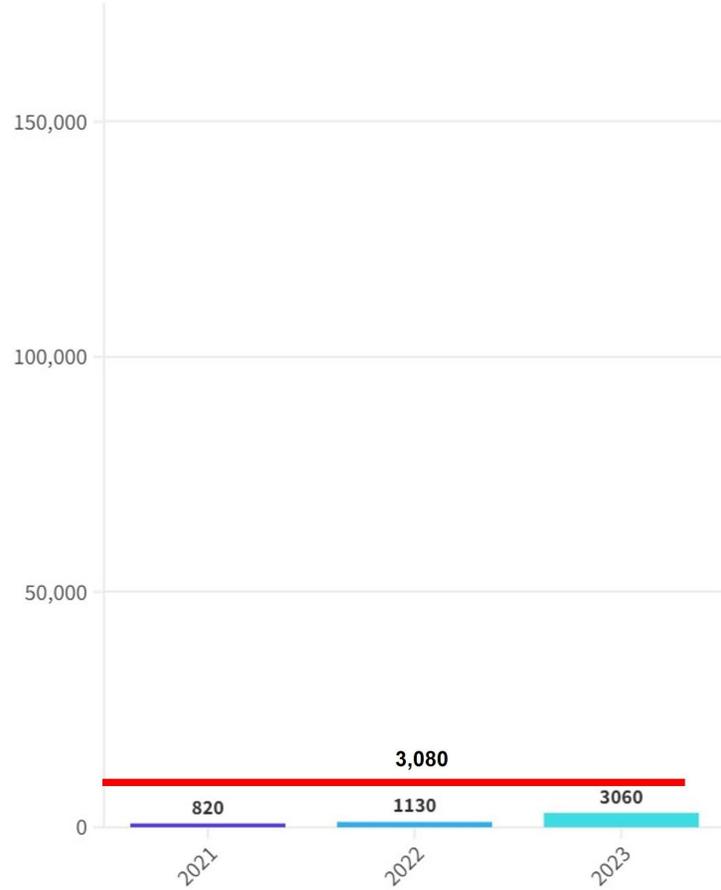


UK/Ireland/Scandinavia Overnight Visitation to the Tampa-St Pete-Clearwater MSA

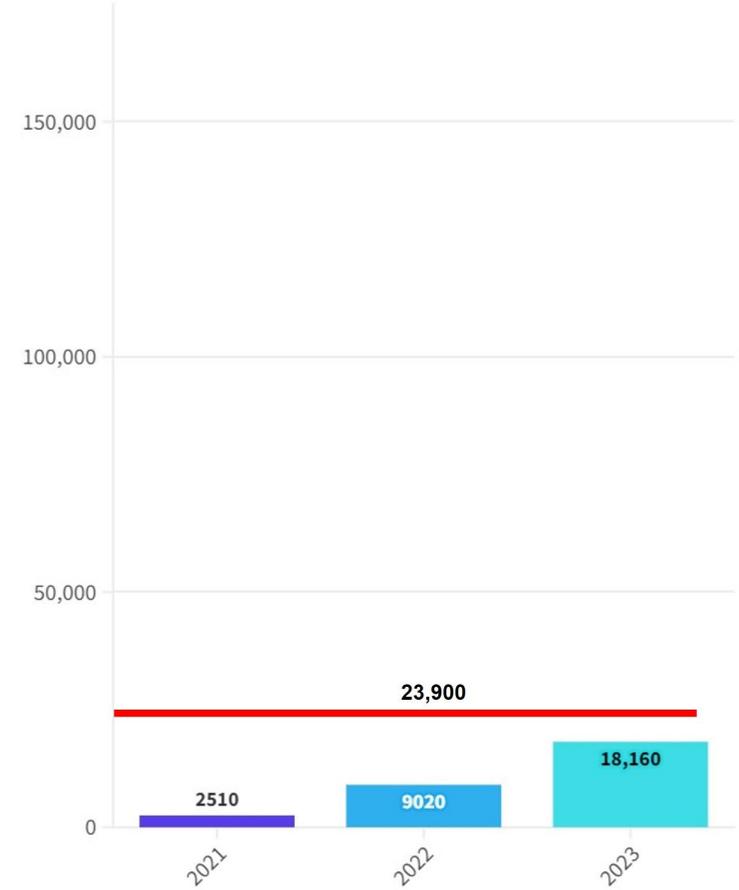
United Kingdom



Ireland



Scandinavia



Source: Tourism Economics - GCT
Scandinavia = Denmark, Norway, Sweden

FY 2023

Key Accomplishments

- Telegraph Campaign, a six-month targeted awareness campaign with value added competition element. Total competition entries: 22,806 (3,650 of these have opted-in to our newsletter database).
- Camp Bestival, Shropshire, a successful outdoor consumer activation, targeting the family market. Visit St. Pete/Clearwater were also an official partner of the festival.
- Trade events and training in the UK, Ireland and Scandinavia, educating key travel partners.
- Media events in the UK, educating media across the country.
- Virgin Atlantic inaugural and trade mega FAMS, launching the new daily service working with and educating key journalists and trade partners – hosting a total of 84 trade members.
- Continued and ongoing success running marketing campaigns with prominent travel publications and tour operators.
- Grew the trade database by 357% & consumer by 12.64%





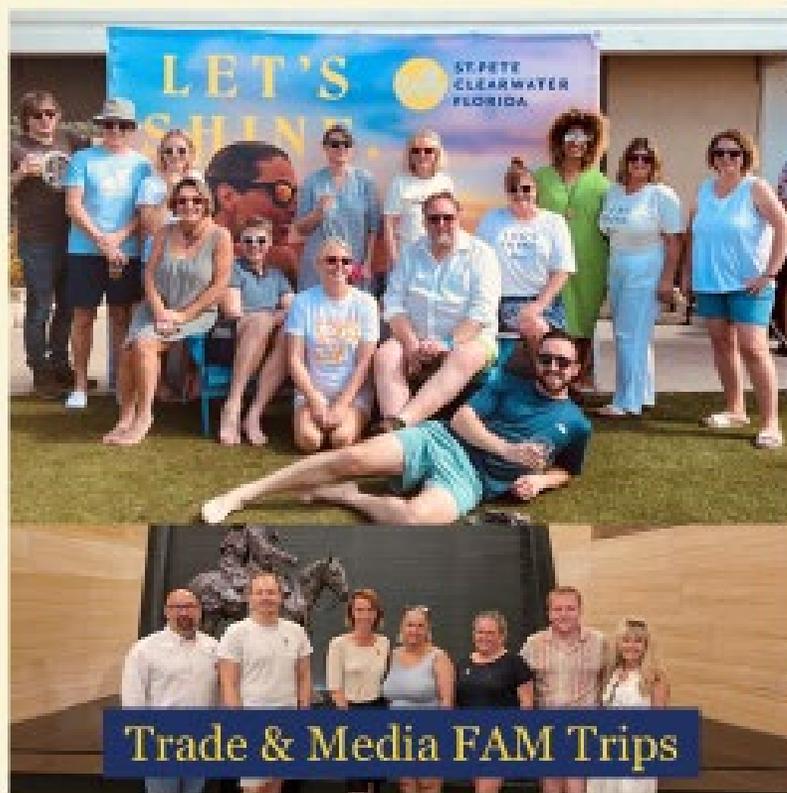
Camp Bestival, Shropshire



Events & Training



Virgin Atlantic Launch



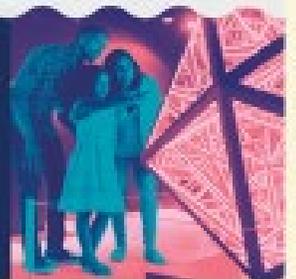
Trade & Media FAM Trips



Marketing campaigns

LET'S GET AWAY, TOGETHER.

Get out for a bright, shiny and vibrant vacation. Whether you need a relaxing and indulgent, social-filled getaway, or a full-on beach vacation, there's something for everyone. Book your trip at the Clearwater Beach Museum, the Clearwater Collection and so many more exciting experiences. Make your vacation a masterpiece in St. Pete Clearwater. Let's shine - plan your stay at St. Pete Clearwater.



FY 2023 Key PR Accomplishments

Public Relations Results:

- 9 media and bloggers hosted (individual / group visits)
 - Monthly press releases, ongoing pitching of a variety of story angles to generate media interest
 - Promotion of St. Pete / Clearwater at leading media events including IMM London, Media Getaway Leeds, Visit USA
-
- ➔ 135 articles in UK press
 - ➔ 680+ million reach
 - ➔ Strong domain authority (quality pieces)
 - ➔ \$33.3 million media value



Opportunities & Headwinds

OPPORTUNITIES

- Flight frequency from the UK into Tampa Intl
- Strong, interactive arts scene (urban murals, Dali Museum) with interesting stories to tell
- Trend of discovering the 'lesser known' destinations and travelling off the beaten track
- Trend of eco-tourism and nature-based tourism/exploring places with outdoor landscapes
- New hotel opening/renovations & ongoing strong tourism product development (accommodation, restaurants, bars, attractions, museums)
- Home to Florida's largest Pride Festival and other impressive events calendar
- Twin centre with Orlando and other Florida destinations

THREATS

- Competition from other beach destinations both in the US and globally
- Environmental, Red Tide & Hurricanes
- Perception of danger/gun crime in the US & civil unrest/racial inequalities in the US (Black Lives Matter AND LGBTQIA+ rights infringements)
- Ongoing conflicts in Ukraine/Israel
- Cost of living

Looking ahead to FY2023-24

- ITV 'A Taste of Florida'
- Upcoming press and trade FAM trips
- Pitching of story angles and themes that differentiate VSPC from competitor destinations
- Media events (IMM London, Meet the Media Dublin)
- Trade trainings & roadshows
- Consumer & trade shows
- Tour operator campaigns
- Brand partnerships
- Partnerships with Brand USA, Visit USA & Visit Florida
- Leveraging the 'Orlando' effect





COAST EVERYWHERE (clockwise from left) The stunning view of Florida beaches and Gulf Coast waters of Clearwater for us at sunset with its trademark colorful striped umbrellas and no sandboarding to create fun for

PHOTOGRAPHY

ETERNAL SUNSHINE

Zoom in on Florida's west coast and you'll find an exceptional stretch of beach, with exciting communities, amazing food and drink, and some of the most fascinating culture in the state

CRASH THE BEACH, you've been here, your partner or simply your best friend. Clearwater is calling, and there's a double bar you're going to warm up in. Beaching is one of some of America's best beaches and currently holding the Guinness World Record for the longest run of non-stop days of sunshine (a whopping 293 to be exact). In Clearwater, you get the goods and the drink required to enjoy them.

Local bars go all-out to drive things which is served by regular direct flights from London to both LA and Vegas - this guaranteed water backdrop. And while there's no shortage of award-winning gourmet beaches are there - enough to make you want to visit. In fact, there is so much more to the region than just good food.

Have your afternoon on a sun lounger and explore a little further afield, diving under the surface of the sea or around the coastline. How your walking shoes and set your sights on one of the many state

parks - like Honeymoon Island, a private island connected to the mainland by the Dunedin-Clearwater Island Causeway - you'll find it - the island's historic lighthouse and history that make it a focus of adventure and history. It's a great looking for a unique experience. Not feeling so ready yet? Honeymoon Island park's Garden Island is home to over 100 acres of non-associated nature reserves, protected with walking trails and only accessible by boat.

Every year there's a festival with a show of underwater life and for the best on one of the many fishing charters on offer in the area. The historic regeneration of the Gulf coast is a joy for marine life - the coastline around St. Pete/Clearwater also is home to over 100 species. Drop a line, catch a fish and see about catching the evening dinner - we promise that when you work harder for it, food tastes all the better. Away from the many shops, culture and hospitality abound. The region also is

home to over 100 craft breweries, which led to the development of the craft beer trail. Starting from Tampa (just a 90-minute drive) it's a fun way to enjoy the best of the state's best beer. Bringing the kids along? Check the top-rated and best kid's area around town with a local water park. St. Pete's historic street art scene. Or, explore them on the distinctive geography of the region with a trip to Tampa Bay Beach Discovery Center - an exciting water discovery area at a young children's center. The water is so good, you'll want to see the water and the surrounding area. It's all here in marine conservation.

We haven't even started on the things that make St. Pete/Clearwater so special. The water is so good, you'll want to see the water and the surrounding area. It's all here in marine conservation. We haven't even started on the things that make St. Pete/Clearwater so special. The water is so good, you'll want to see the water and the surrounding area. It's all here in marine conservation. We haven't even started on the things that make St. Pete/Clearwater so special. The water is so good, you'll want to see the water and the surrounding area. It's all here in marine conservation.



Photos, have you heard of St. Pete/Clearwater in Florida? We won't judge you if it's a no.

But in the UK, it's a popular destination due to its 35 miles of white sand beaches and year-round sunshine. It was even named one of the best places to travel in the US by Forbes, and St. Pete Beach was named America's #1 Beach by TripAdvisor's Traveler's Choice.

It's also a little different to the Florida you know. There's a vibrant arts community, and the area is affectionately known as the Gulf Coast, due to the 40 plus local breweries and craft beer trail. There's to that.

Is this your next trip? Check out our guide and the deals to get you there!

Good times & sun lines why St. Pete/Clearwater should be your next US holiday



First things first

St. Pete/Clearwater is a beautiful coastal town with a rich history and a vibrant arts community. It's a great place to visit for anyone looking for a relaxing vacation.

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ST. PETE CLEARWATER FLORIDA

The sun in Sunshine State

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Why St. Pete/Clearwater and Orlando make a perfect Florida holiday duo

Just a short hop from Orlando, St. Pete/Clearwater with its miles of beaches and warm Gulf waters, is the perfect place to relax and explore

By Michelle Morgan
17 October 2018, 12:00pm



The Florida winter sun getaway that has it all

With over 30 miles of beaches, St. Pete/Clearwater has everything you need for a perfect winter sun getaway. It's a great place to visit for anyone looking for a relaxing vacation.

By Michelle Morgan
17 October 2018, 12:00pm



LET'S SHINE.



PLAN YOUR ESCAPE



LET'S SHINE.



PLAN YOUR ESCAPE

CENTRAL EUROPE UPDATE



FY 2023 Key Accomplishments

Public Relations Results:

- 16 media visits (individual / group visits)
- Monthly press releases, robust media outreach after the pandemic
- Promotion of St. Pete / Clearwater at leading media events
 - ➔ 668 articles (in DACH markets)
 - ➔ 301+ million reach
 - ➔ almost \$14 million media value



FY 2023 Key Accomplishments

Marketing & Sales Activities in nine European countries:

B2C promotions with leading tour operators

Face-to-face training of 900+ travel agents

Promotion of St. Pete / Clearwater at about 30 leading trade shows and industry events (B2B and B2C)

Hosted 32 top travel agents and tour operators from Germany, Switzerland and the Netherlands in our area

One month long complimentary promotion of St. Pete / Clearwater in 700 McDonald's restaurants resulted in 35 million consumer contacts (media value: \$2.65 million)



Headwinds & Opportunities

Challenges

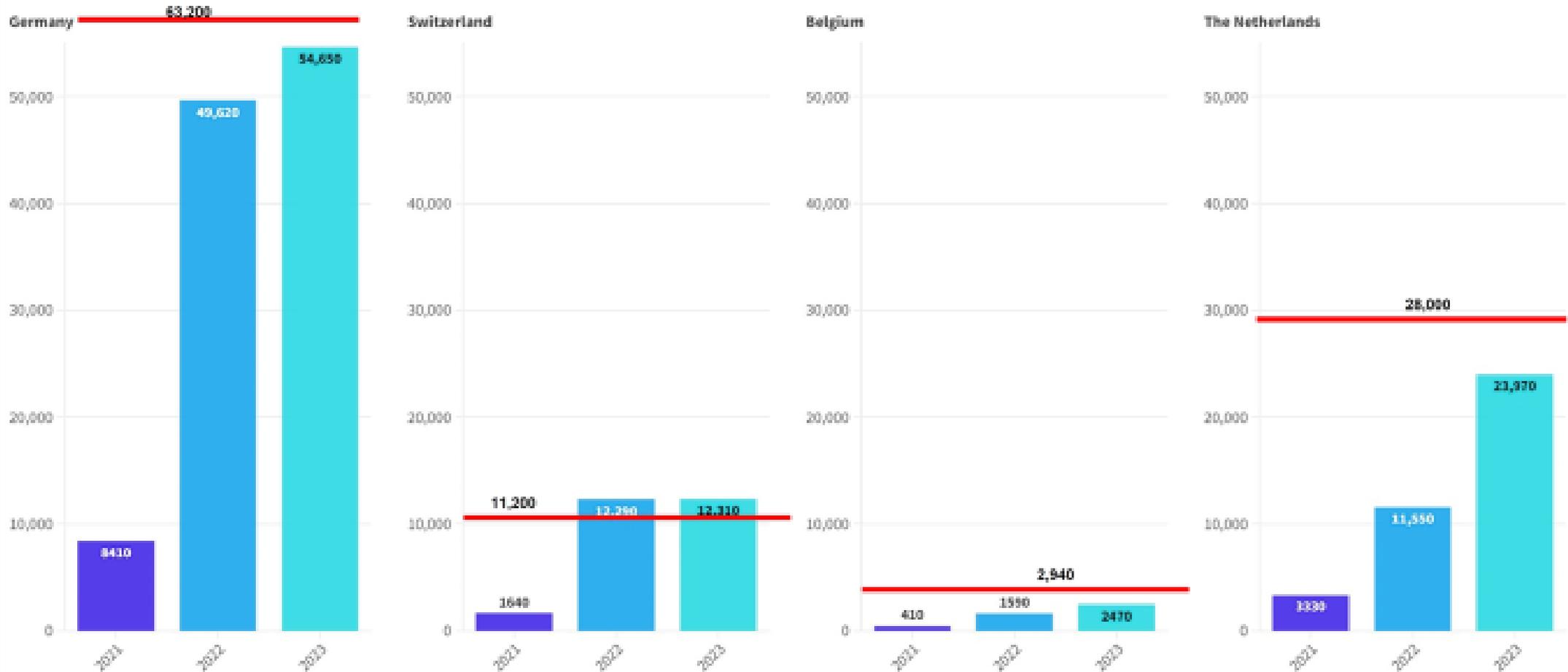
- Strong Competition from other FL destinations, Caribbean, Asia, etc.
- Exchange Rate – value for product available.
- Higher prices for accommodations as well as gas/plane tickets.
- Weather/Environmental issues – Red Tide and Hurricanes.
- Economies (ongoing inflation and moderate recession).
- Military Disturbances (Ukraine / Israel).

Opportunities

- Increased air service to TPA:
 - Discover (daily flights from FRA in 2024)
 - Edelweiss (4 flights/week from ZRH in 2024)
 - Potential new airlines (i.e., AMS)
- Strong motivation to travel to Florida.
- Ongoing strong tourism product development (accommodations, restaurants, breweries, attractions, museums).

Central European Visitation Post Pandemic

Germany/Switzerland/Belgium/Netherlands Overnight Visitation to the Tampa-St Pete-Clearwater MSA

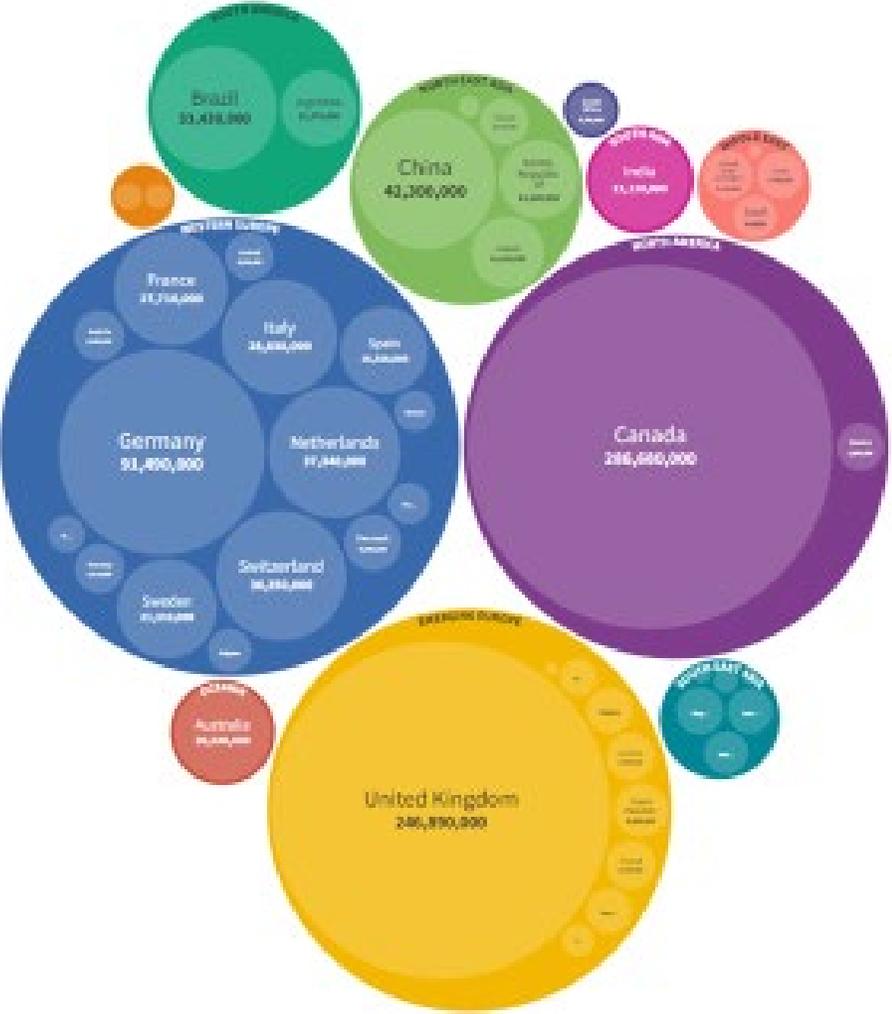


Source: Tourism Economics - GCT

Intern. Inbound Spending - Regions

Tampa-St Pete-Clearwater MSA Visitor Markets by Inbound Spending

Regions



South America Oceania Western Europe Emerging Europe North America North East Asia North Africa South Asia South East Asia Middle East Sub-Saharan Africa

Source: Global Economics - GlobalCity Travel



FY 2024 - Tactics

- Very robust media outreach and high amount of tourism sales activities to increase visibility and demand.
- Increase FAM visits to showcase our destination (media / trade).
- Leverage our relationship with Brand USA.
- Partner with Visit Florida, Visit USA Committees and other Florida DMO's when applicable.
- Continued focus on affluent travelers & savvy value travelers.
- LGBTQ+ International Travel.
- Both B2B and B2C sales concentration.



THANK YOU

