



ST.PETE
CLEARWATER

Visit St. Pete/Clearwater
VISITOR PROFILE STUDY
Report of Findings
2022 Calendar Year

Research prepared for Visit St. Pete/Clearwater by:

Destination  Analysts

TABLE OF CONTENTS

Overview & Methodology	3
Research Objectives	5
Calendar Year 2022 Economic Impact Analysis	6
Visitor Summaries by Traveler Segment	19
Visitor Summaries by Generation	24
Planning the St. Pete/Clearwater Trip	28
Visitor Trip Details	34
Visitor Satisfaction	55
Point of Origin & Demographic Profile	62

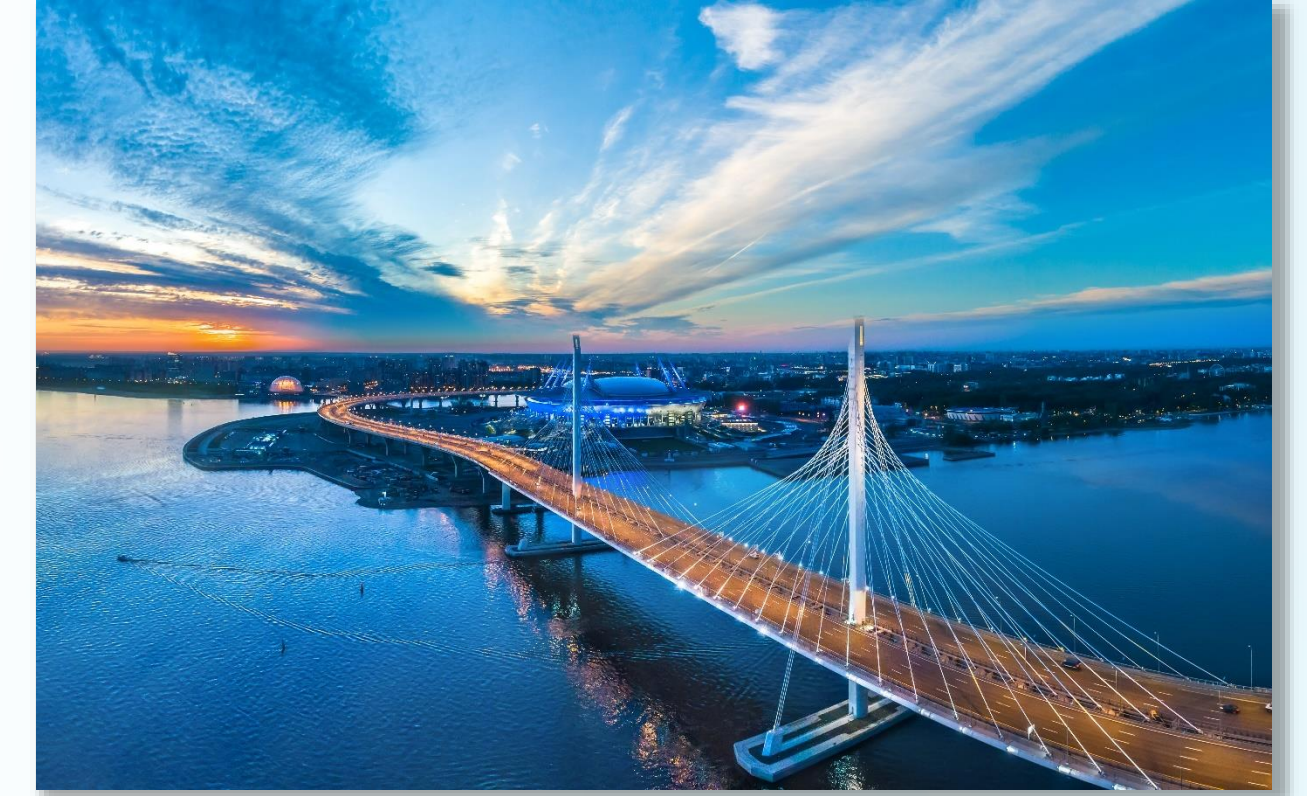
OVERVIEW & METHODOLOGY

This report presents the comprehensive findings of a visitor profile and tourism economic impact study conducted by Destination Analysts 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 report presents the top-line survey data collected from visitors surveyed during Calendar Year 2022 (CY 2022); i.e., January 1, 2022 through December 31, 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, 5,129 completed surveys from Pinellas County visitors were collected.

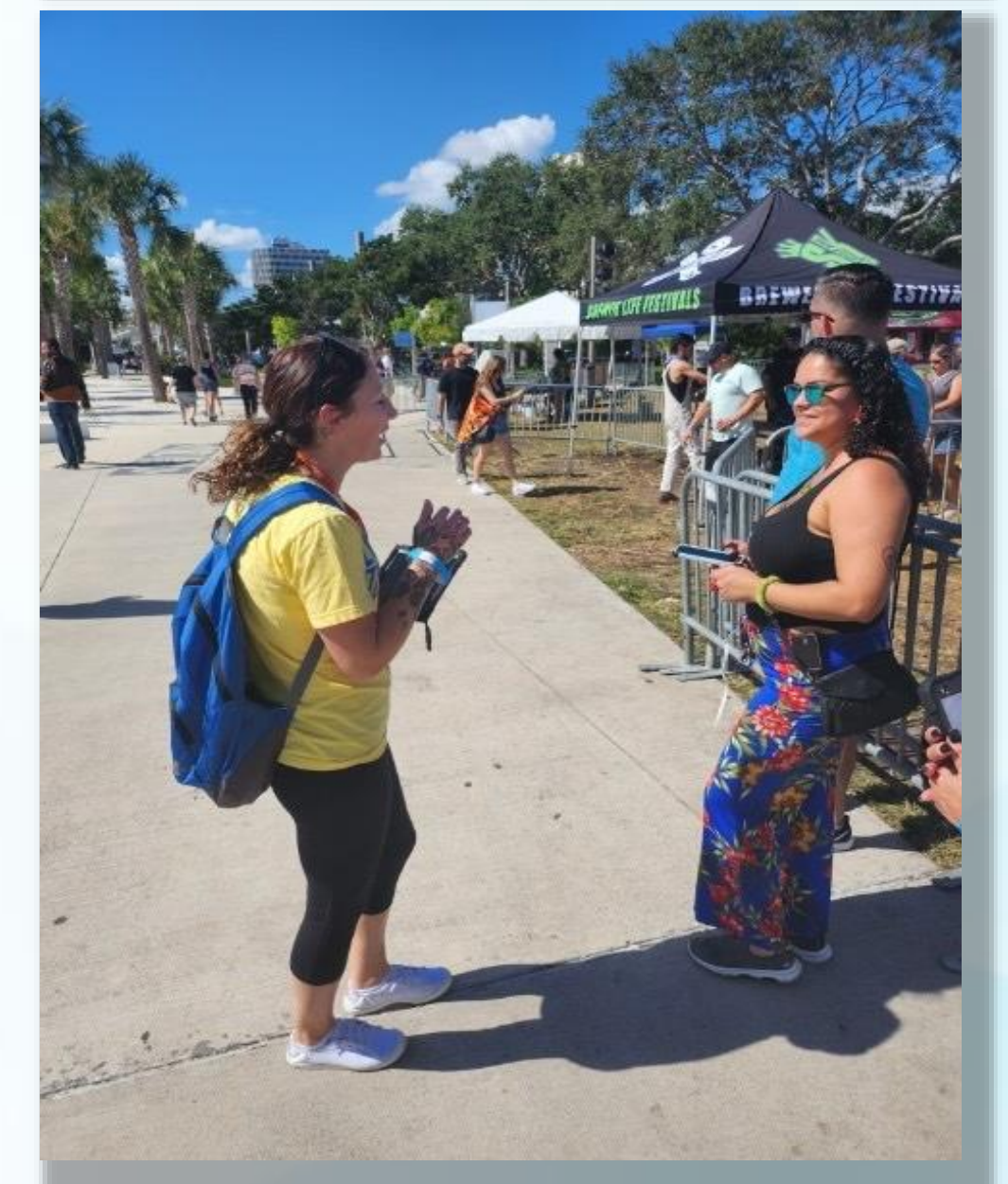


Above: Images of the St. Pete/Clearwater area.

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: Destination Analysts' research staff surveying a visitor.

A background image of a marina with many sailboats docked. In the foreground, there are palm trees and a paved walkway with some utility boxes. The image is dimmed to allow the white text to stand out.

Calendar Year 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 – CALENDAR YEAR 2022

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

	Q1 (January 2022 – March 2022)	Q2 (April 2022 – June 2022)	Q3 (July 2022 – September 2022)	Q4 (October 2022 – December 2022)	Calendar Year 2022
Visitors to Pinellas County	4,272,548	4,077,416	3,661,043	3,434,064	15,445,071
Direct Visitor Spending in Pinellas County	\$1,847,615,895	\$1,815,368,425	\$1,545,389,468	\$1,497,959,201	\$6,706,332,990
Total Economic Impact of Tourism to Pinellas County	\$2,984,226,696	\$3,053,492,119	\$2,611,381,728	\$2,495,167,641	\$11,144,268,184
Tax Revenues Generated for Pinellas County	\$116,418,507	\$116,834,816	\$97,135,879	\$93,546,346	\$423,466,179
Hotel Room Nights	1,747,885	1,747,912	1,537,308	1,606,362	6,639,467
Visitor Industry Payroll	\$957,175,518	\$980,252,557	\$838,810,396	\$786,437,547	\$3,562,676,018
Jobs Supported	29,314	30,150	25,772	24,130	109,365

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 January 2022 – December 2022

- **Visitors to Pinellas County** - Pinellas County had a total of 15.4 million visitors between January 2022 – December 2022. The largest segment of Pinellas County's visitor volume is day trip visitors from outside the surrounding region, comprising 5.2 million visitors, or 33 percent of all visitors.
- **Direct Visitor Spending in Pinellas County** - The Pinellas County tourism industry generated \$6.7 billion in direct visitor spending inside the county from January 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 \$3.2 billion in visitor spending, or 47 percent of the total.
- **Total Economic Impact of Tourism to Pinellas County** – Tourism generated a total of \$11.14 billion in economic impact for Pinellas County during January 2022 – December 2022. The total economic impact is comprised of direct visitor spending, as well as indirect and induced effects.

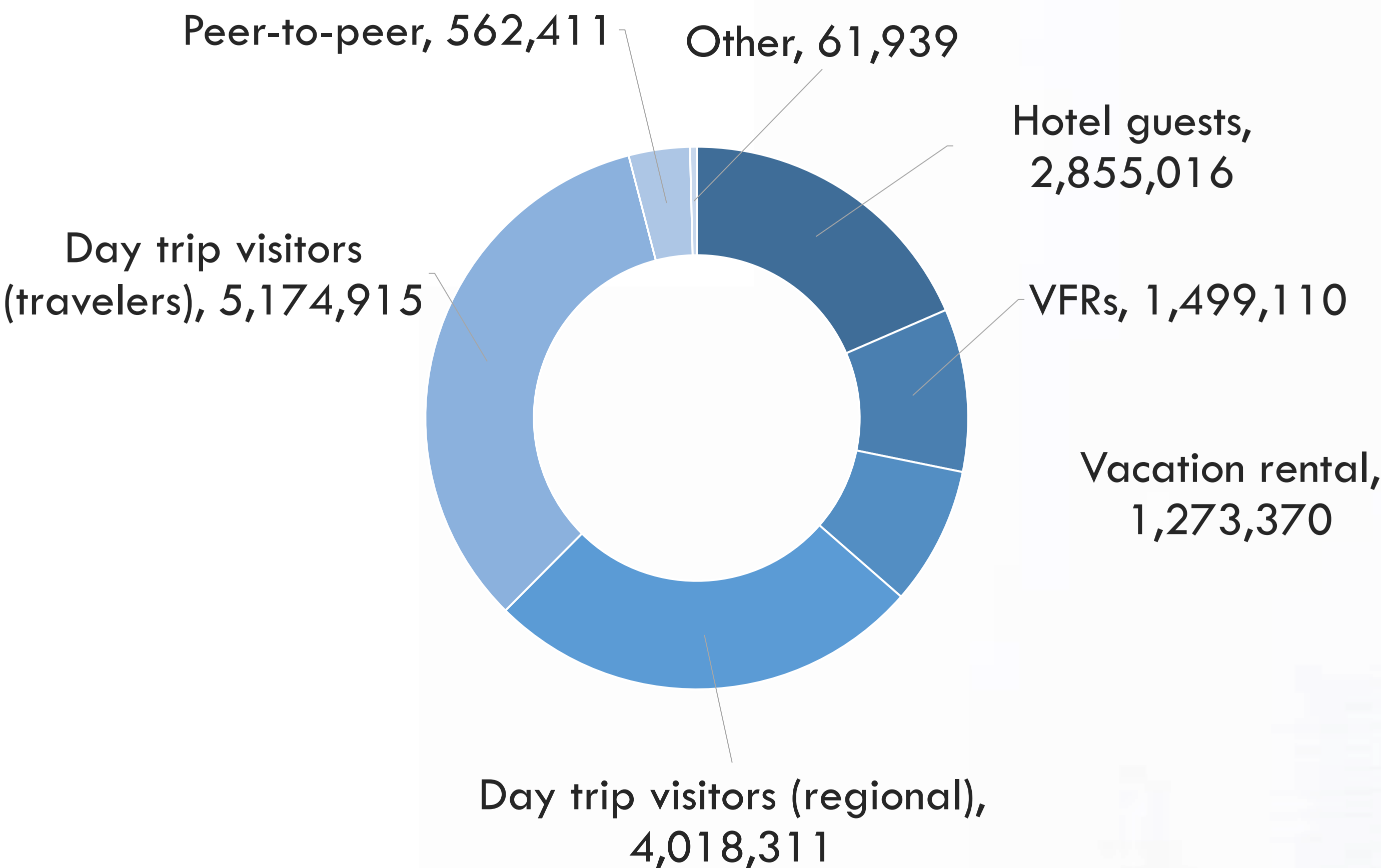
ECONOMIC IMPACT ESTIMATES: SUMMARY OF KEY FINDINGS

- **Tax Revenues Generated for Pinellas County** – Pinellas County’s tourism industry generated \$423 million in tax revenues for governmental entities from January 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 January 2022 – December 2022, an estimated 6.64 million hotel room nights were generated in Pinellas County by visitors.
- **Visitor Industry Payroll and Jobs supported** – Between January 2022 – December 2022, the Pinellas County tourism industry had an estimated total combined payroll of \$3.6 billion. This is estimated to have supported 109,365 jobs county-wide.



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

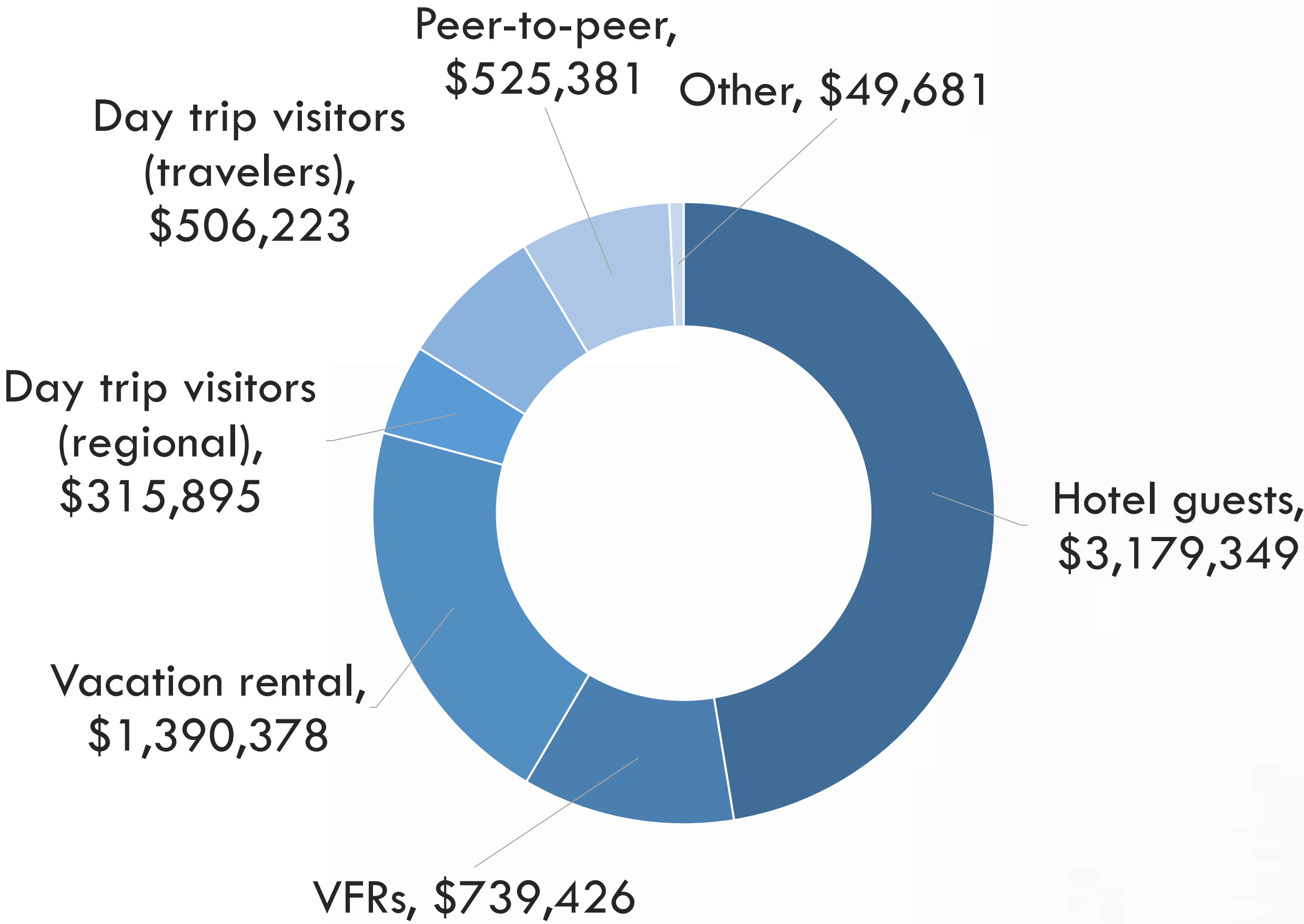
VISITORS TO PINELLAS COUNTY



Visitors to Pinellas County, by type of visitor

Hotel guests	2,855,016
VFRs	1,499,110
Vacation rental	1,273,370
Day trip visitors (regional)	4,018,311
Day trip visitors (travelers)	5,174,915
Peer-to-peer	562,411
Other	61,939
TOTAL VISITORS	15,445,071

DIRECT VISITOR SPENDING: BY TYPE OF VISITOR

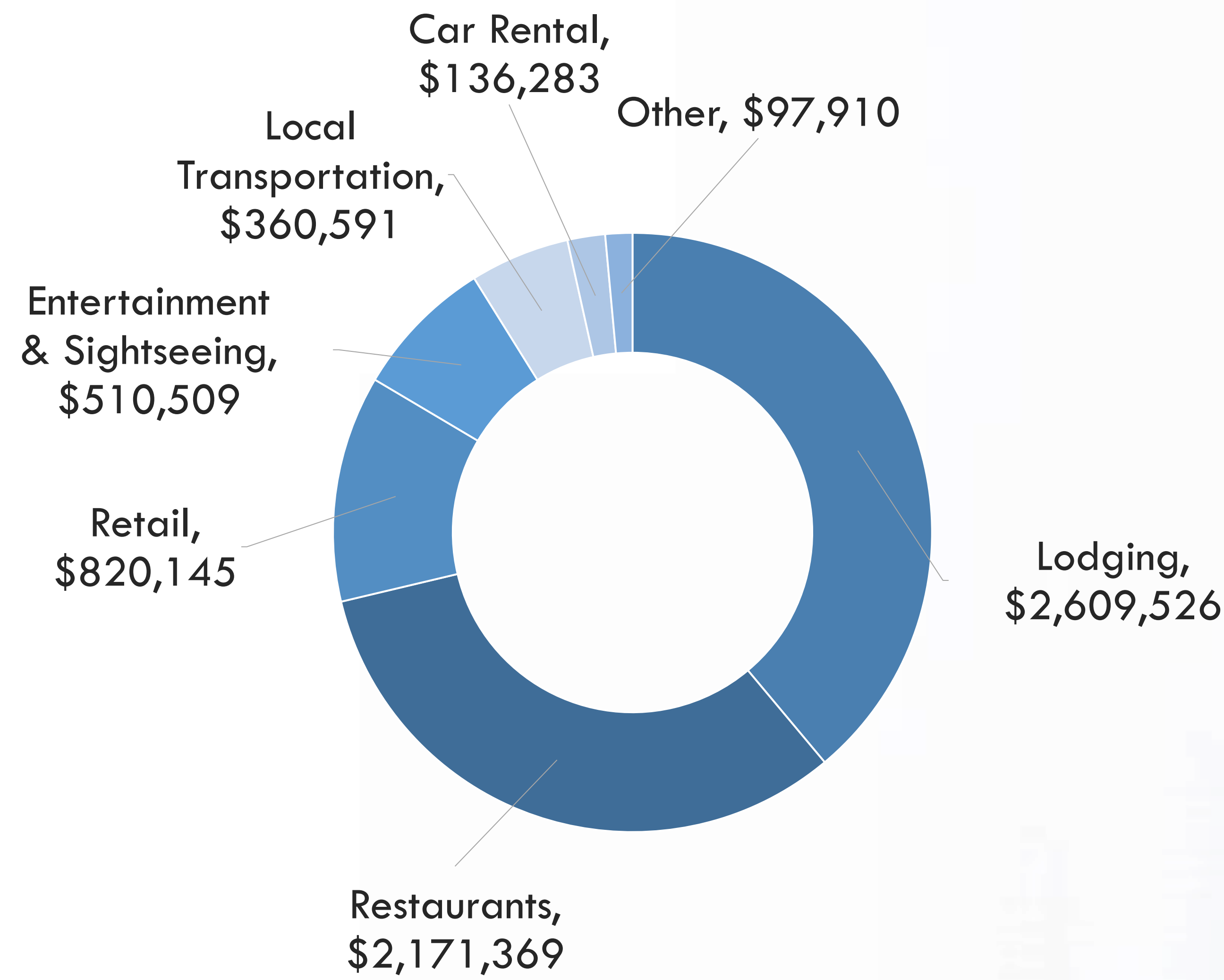


**Spending in Pinellas County, by type of visitor
(in thousands)**

Hotel guests	\$3,179,349
VFRs	\$739,426
Vacation rental	\$1,390,378
Day trip visitors (regional)	\$315,895
Day trip visitors (travelers)	\$506,223
Peer-to-peer	\$525,381
Other	\$49,681

TOTAL DIRECT VISITOR SPENDING	\$6,706,333
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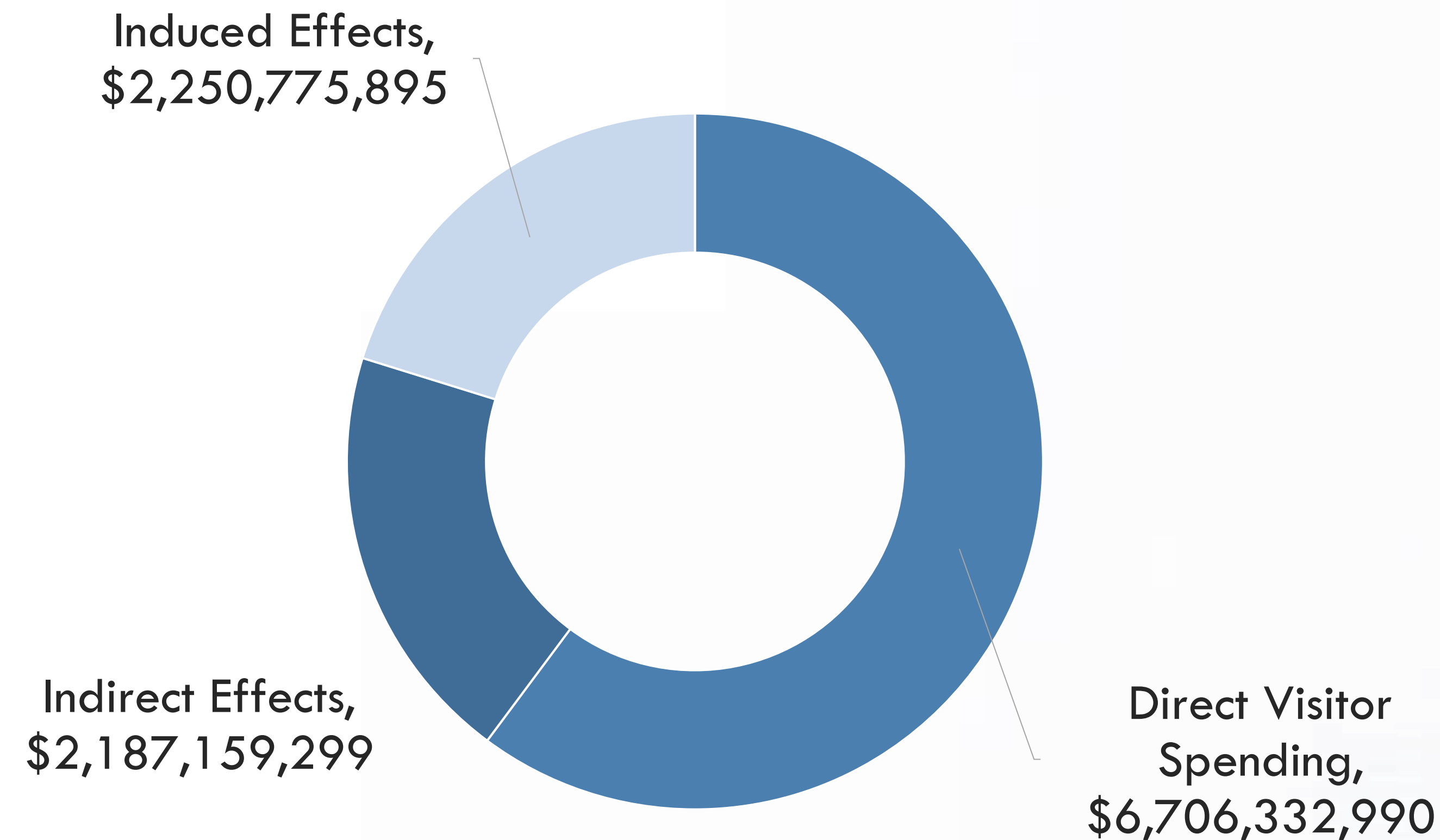
DIRECT VISITOR SPENDING: BY TYPE OF SPENDING



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

Lodging	\$2,609,526
Restaurants	\$2,171,369
Retail	\$820,145
Entertainment & Sightseeing	\$510,509
Local Transportation	\$360,591
Car Rental	\$136,283
Other	\$97,910
TOTAL DIRECT VISITOR SPENDING	\$6,706,333

TOTAL ECONOMIC IMPACT

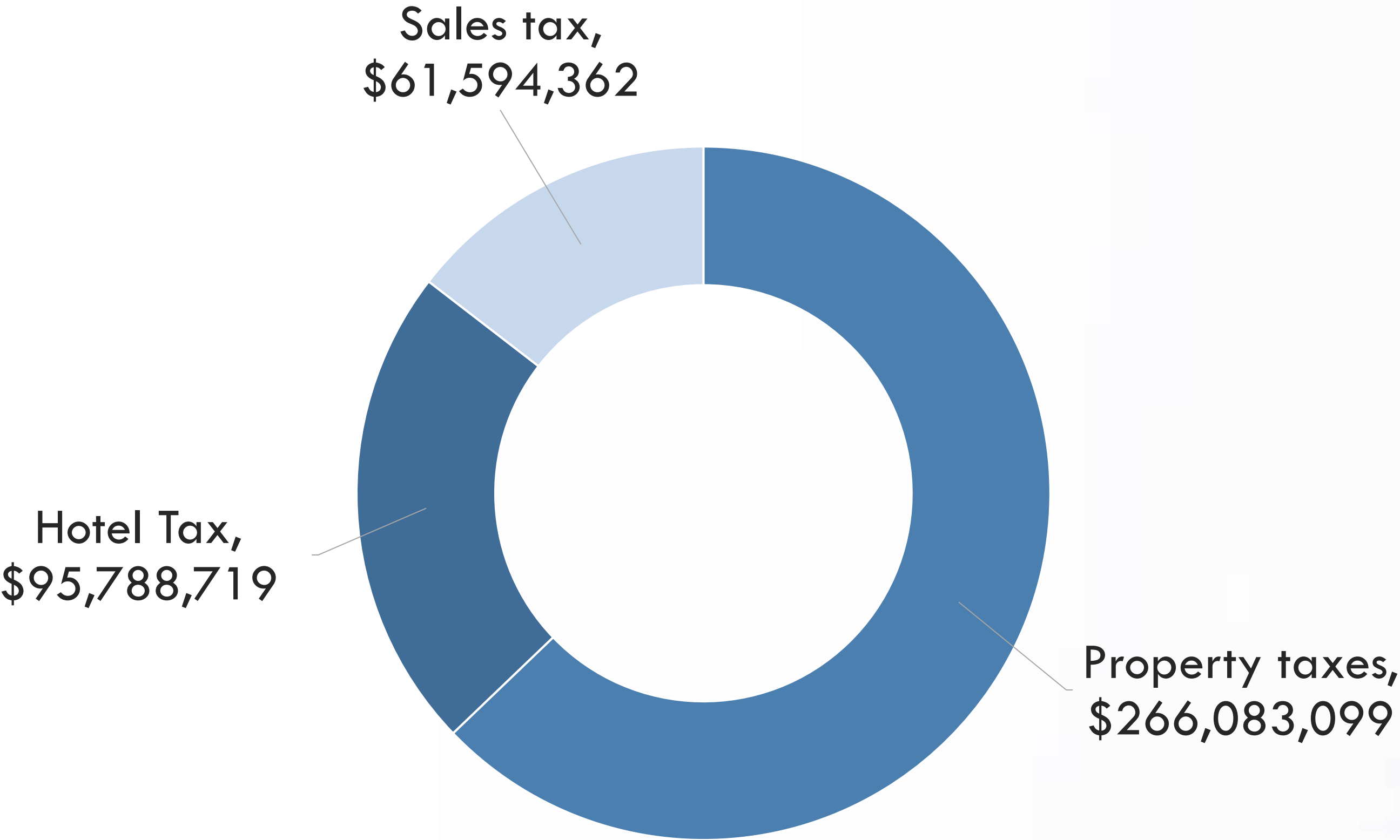


Economic Impact Estimates, by type of effect

Direct Visitor Spending	\$6,706,332,990
Indirect Effects	\$2,187,159,299
Induced Effects	\$2,250,775,895

TOTAL ECONOMIC IMPACT	\$11,144,268,184
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TAX REVENUES GENERATED



Tax Revenues Generated, by type of tax

Property taxes	\$266,083,099
Hotel Tax	\$95,788,719
Sales tax	\$61,594,362

TOTAL TAX REVENUES GENERATED	\$423,466,179
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ECONOMIC IMPACT YOY COMPARISON - CY 2022

The following presents the economic impact of tourism to Pinellas County comparing CY22 to past years.

- Looking back on the last 12 months of 2022, Pinellas County saw consistent visitor volume growth, up 3.7% from CY21 (one year ago) and up 1.0% from CY19 (the last calendar year period before the pandemic began in Q1 2020).
- Visitor spending habits have shifted significantly with growth in spending far exceeding growth in volume due to nation wide inflation as well as other impacts. Total economic impact this year is estimated to be up 23.4% from CY21 last year and up 23.7% from CY19 pre-pandemic.
- Compared to past years, all spending and economic impact metrics show growth far outpacing volume and hotel room nights. Even though total occupied room nights is still down from CY19 levels (-3.4%), high average daily rates more than make up for the difference in hotel taxes generated.

ECONOMIC IMPACT YOY COMPARISON- CY 2022

	CY 2021 (January 2021 – December 2021)	CY 2022 (January 2022 – December 2022)	% Change	CY 2019 (January 2019 – December 2019)	CY 2022 (January 2022 – December 2022)	% Change
Visitors to Pinellas County	14,895,107	15,445,071	3.7%	15,289,425	15,445,071	1.0%
Direct Visitor Spending in Pinellas County	\$5,552,526,466	\$6,706,332,990	20.8%	\$5,592,353,940	\$6,706,332,990	19.9%
Total Economic Impact of Tourism to Pinellas County	\$9,028,368,319	\$11,144,268,184	23.4%	\$9,010,017,951	\$11,144,268,184	23.7%
Tax Revenues Generated for Pinellas County	\$352,424,363	\$423,466,179	20.2%	\$331,860,145	\$423,466,179	27.6%
Hotel Room Nights	6,200,193	6,639,467	7.1%	6,870,638	6,639,467	-3.4%
Visitor Industry Payroll	\$2,881,772,185	\$3,562,676,018	23.6%	\$2,880,315,595	\$3,562,676,018	23.7%
Jobs Supported	90,145	109,365	21.3%	90,669	109,365	20.6%



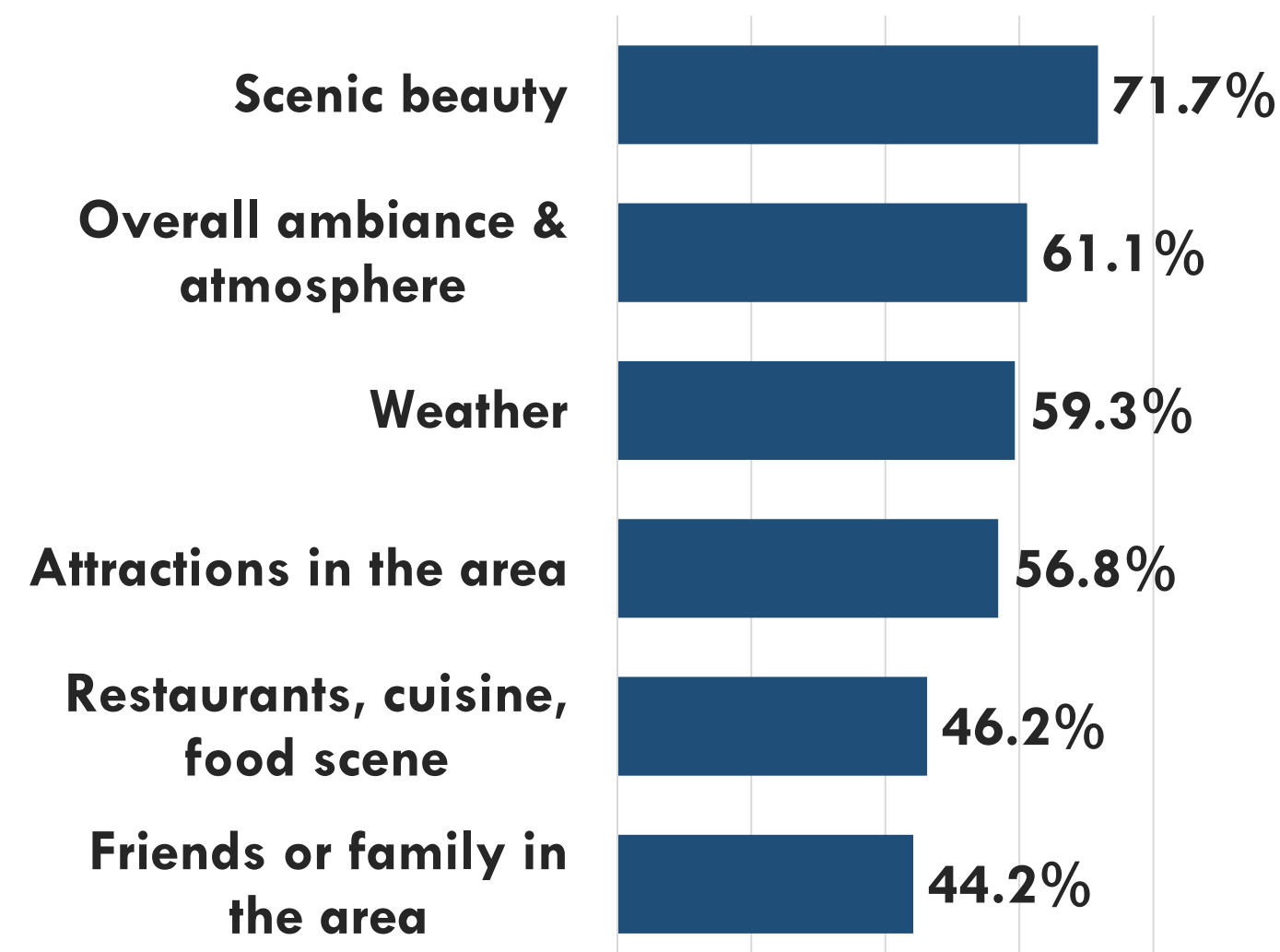
2022 Visitor Summaries by Traveler Segment

THE BEACH GO-ER

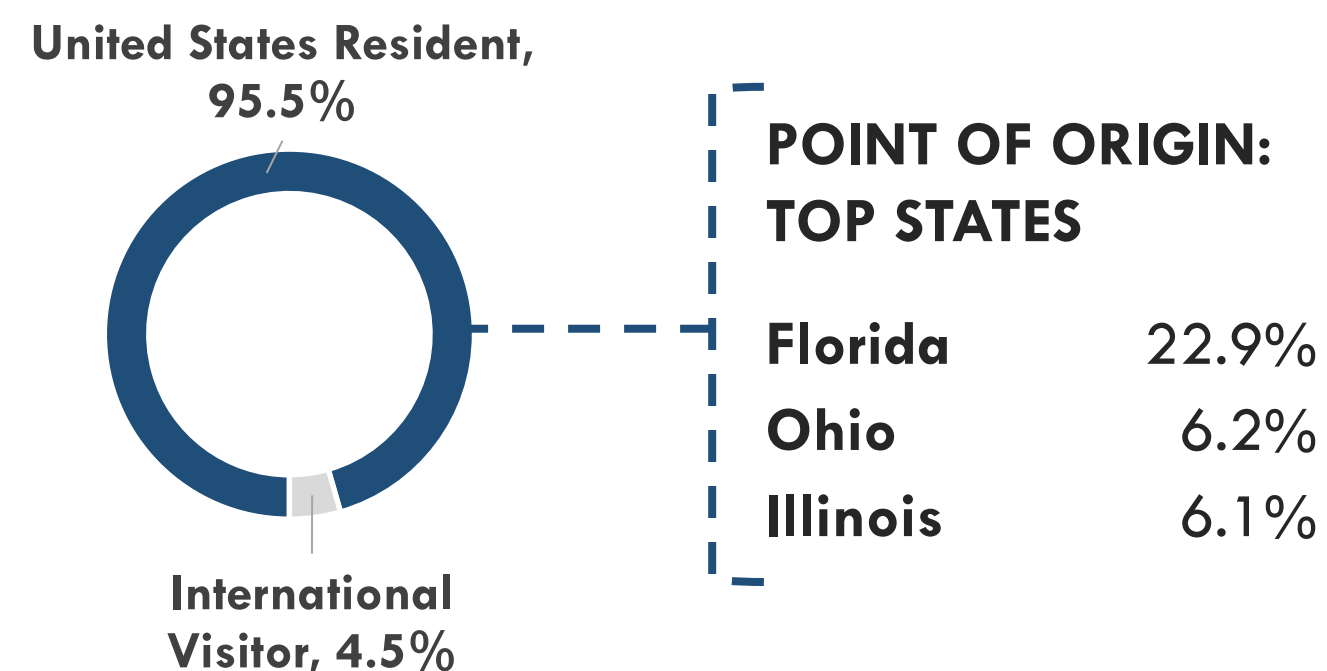
CY 2022

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



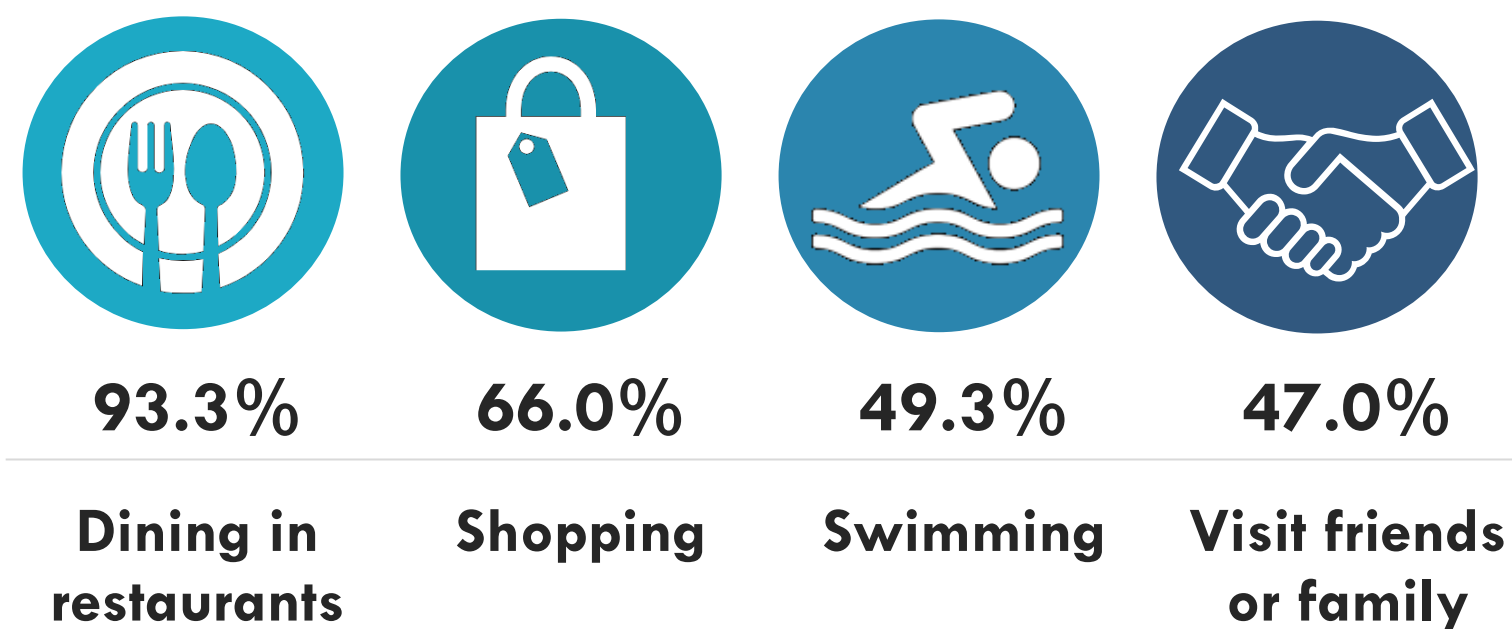
Domestic vs. International



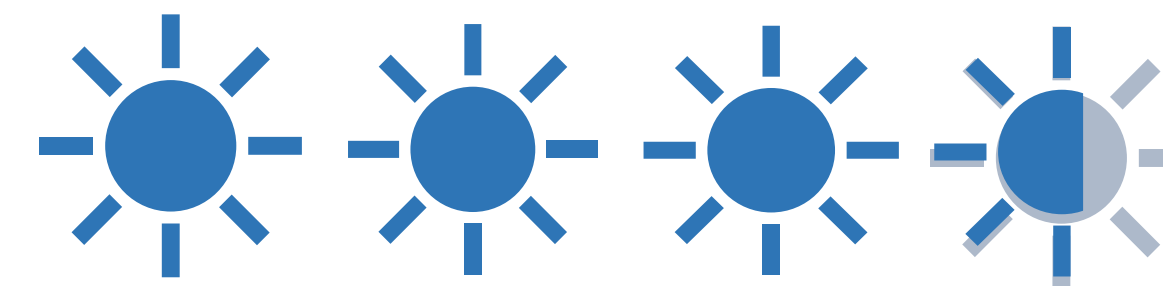
Top Communities Visited

Madeira Beach	51.4%
St. Petersburg	46.5%
Clearwater Beach	45.4%
Treasure Island	29.4%
Pinellas Park	22.8%

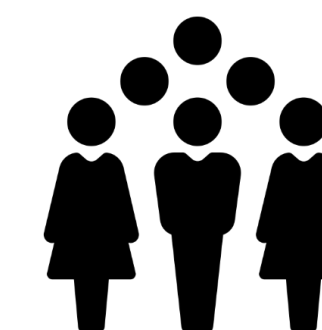
Top Activities



Length of Stay



Travel Party Size



2.9 People

27.2% Traveled with Children

Daily Spending



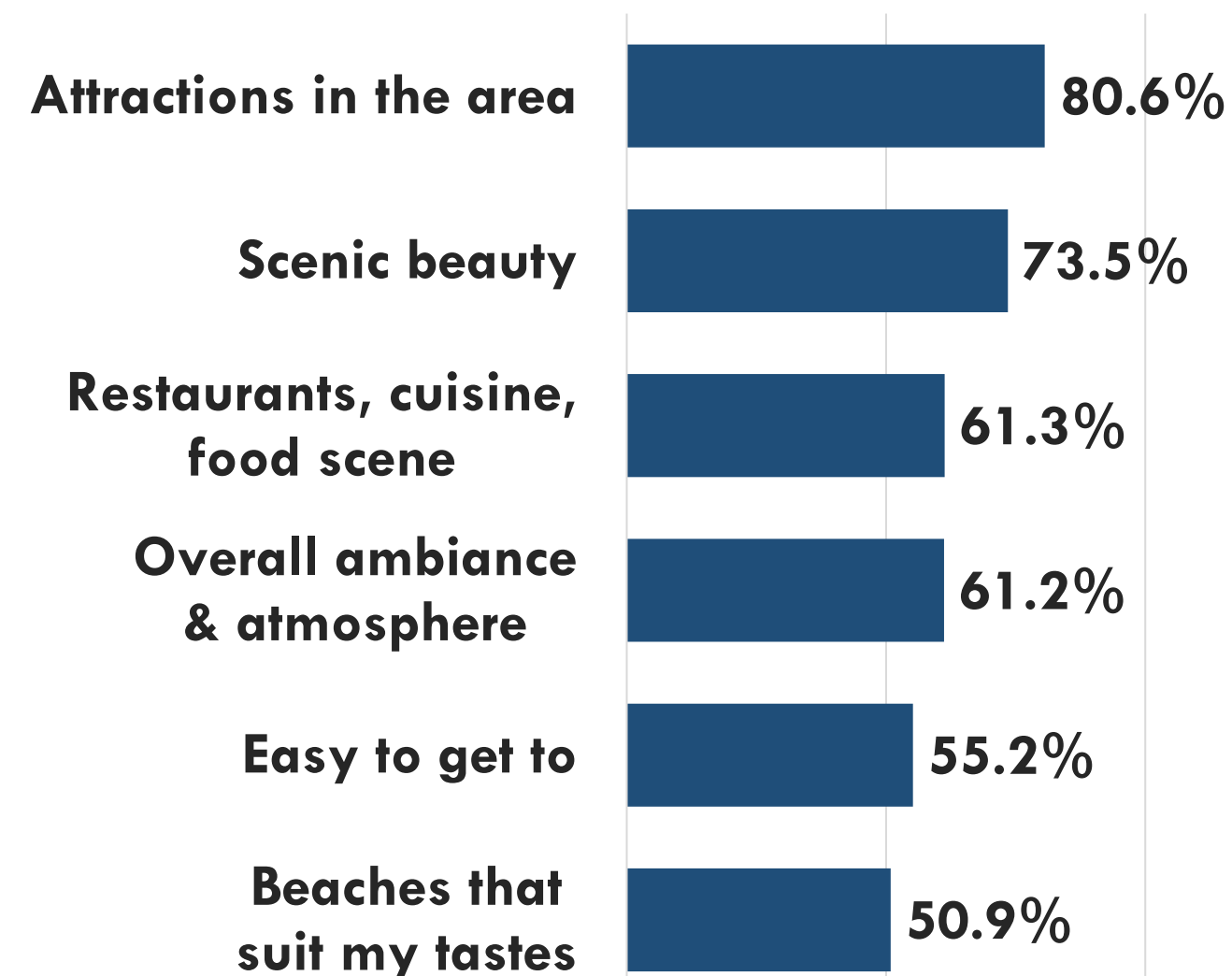
\$125.88
Per Person

THE ARTS & CULTURE VISITOR

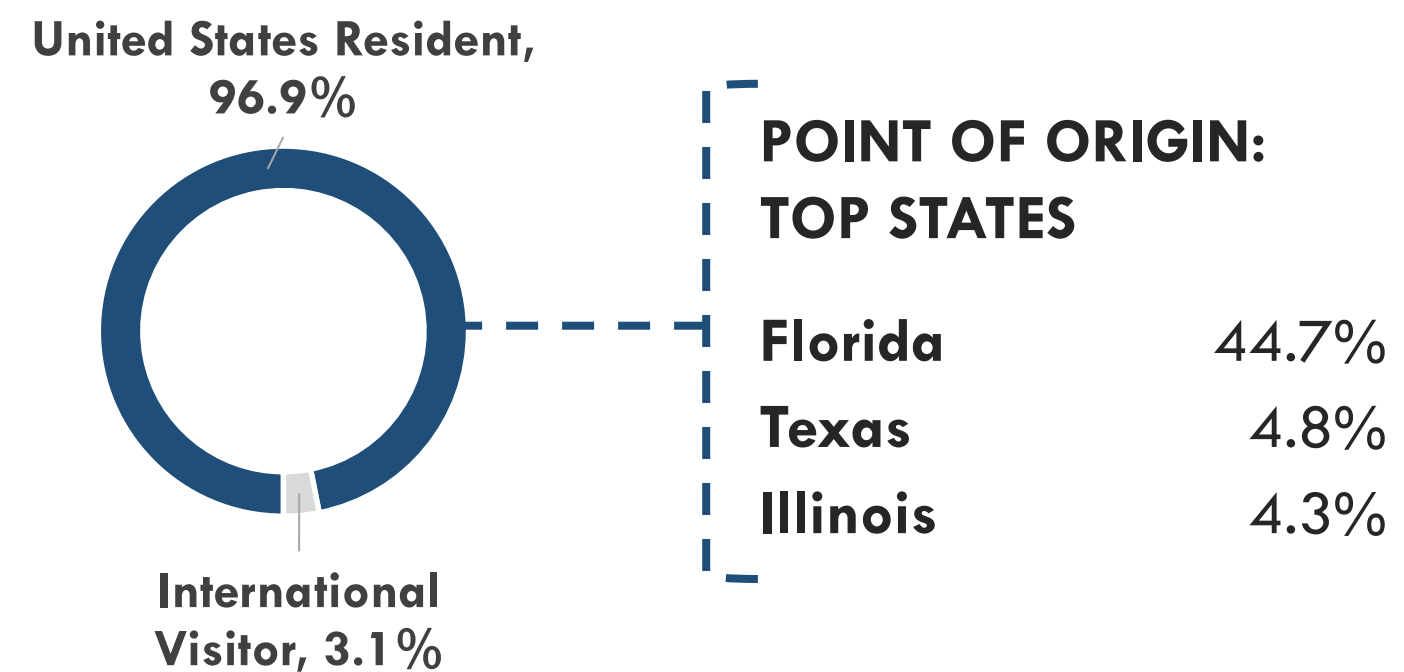
C4 2022

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



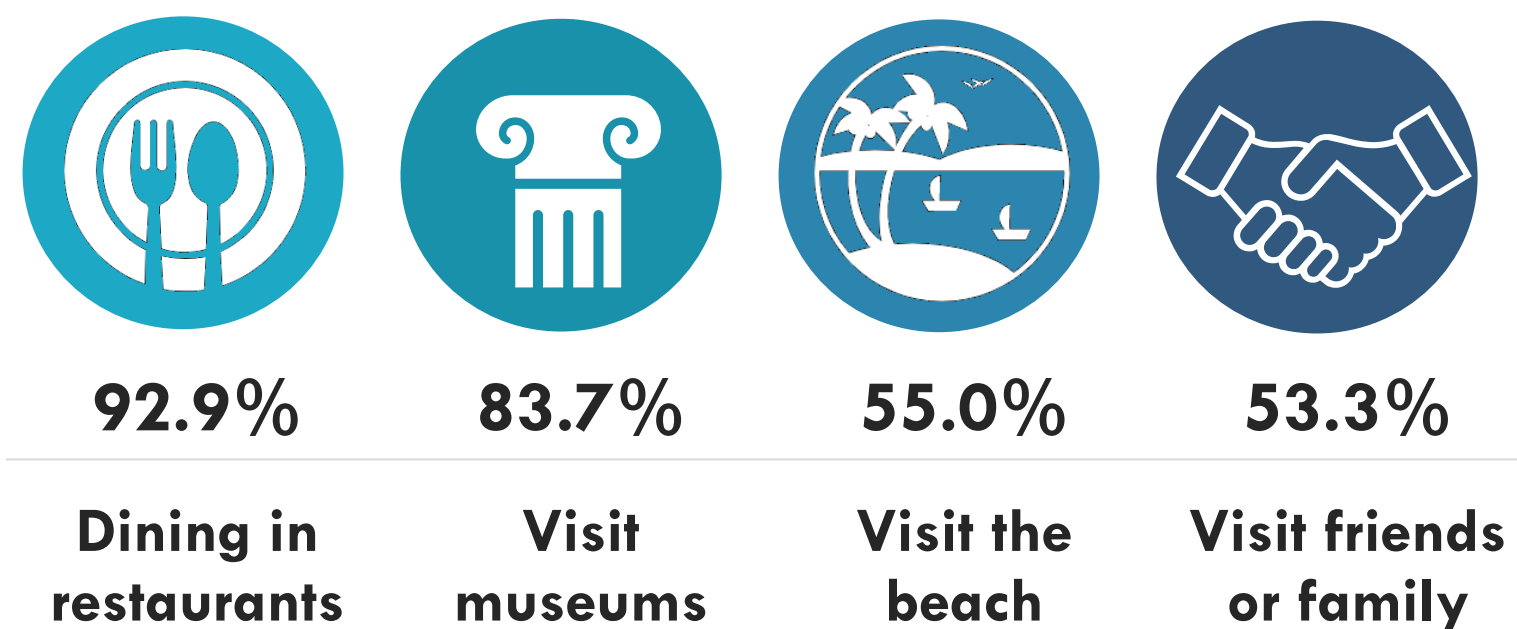
Domestic vs. International



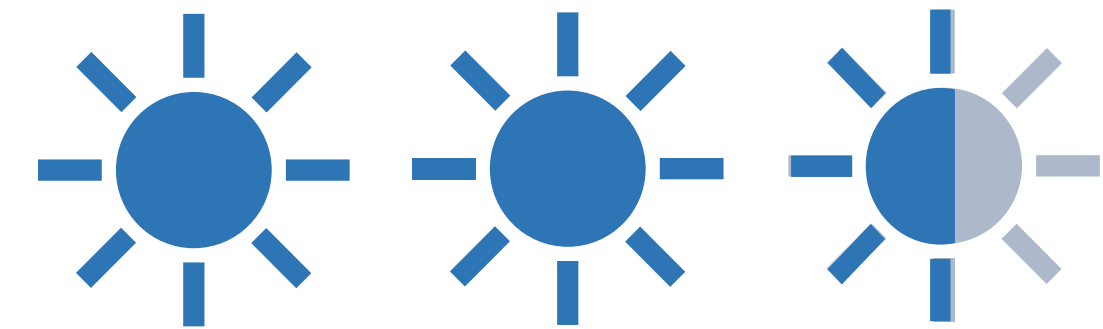
Top Communities Visited

St. Petersburg	96.1%
Pinellas Park	37.5%
Madeira Beach	27.6%
Seminole	20.5%
Treasure Island	19.2%

Top Activities

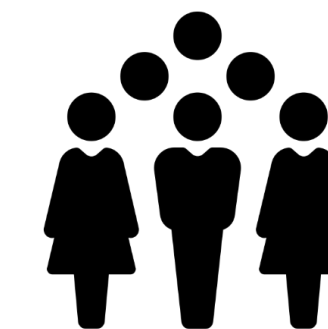


Length of Stay



2.6 Days on Average

Travel Party Size



2.5 People

15.7% Traveled with Children

Daily Spending



\$114.75
Per Person

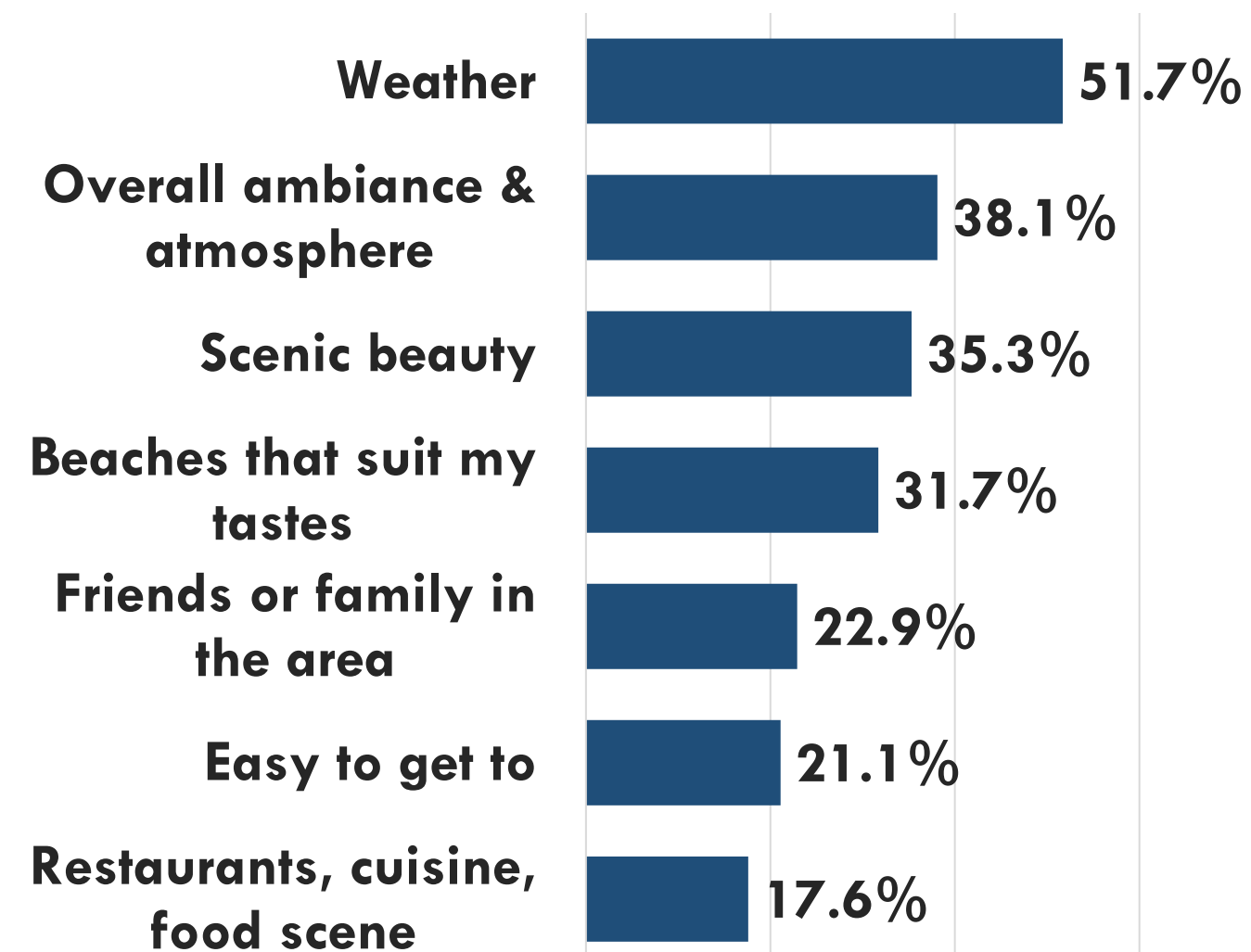


THE AFFLUENT VISITOR

CY 2022

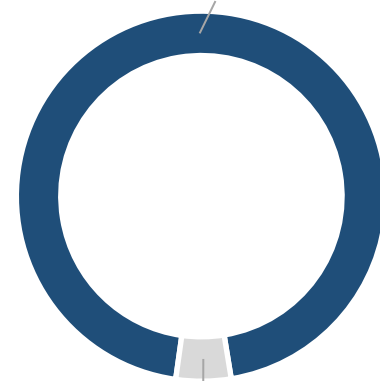
Results presented here are reflective of visitors who reported having an annual household income of \$150,000+

Factors Important to Destination Decision



Domestic vs. International

United States Resident,
95.2%



International
Visitor, 4.8%

POINT OF ORIGIN: TOP STATES

Florida	30.1%
New York	7.0%
Illinois	5.9%

Top Communities Visited

Madeira Beach	42.3%
St. Petersburg	38.5%
Treasure Island	30.4%
St. Pete Beach	25.5%
Clearwater Beach	22.9%

Top Activities



79.0%

Visit the
beach



65.9%

Dining in
restaurants



38.8%

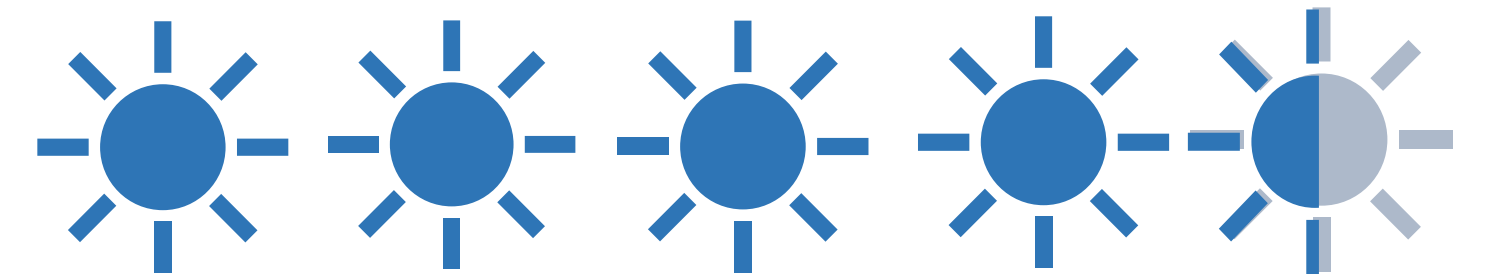
Shopping



33.9%

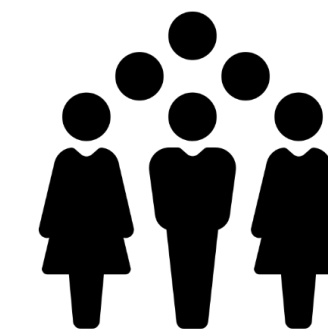
Swimming

Length of Stay



4.4 Days on Average

Travel Party Size



2.8 People

26.4% Traveled with Children

Daily Spending



\$133.01

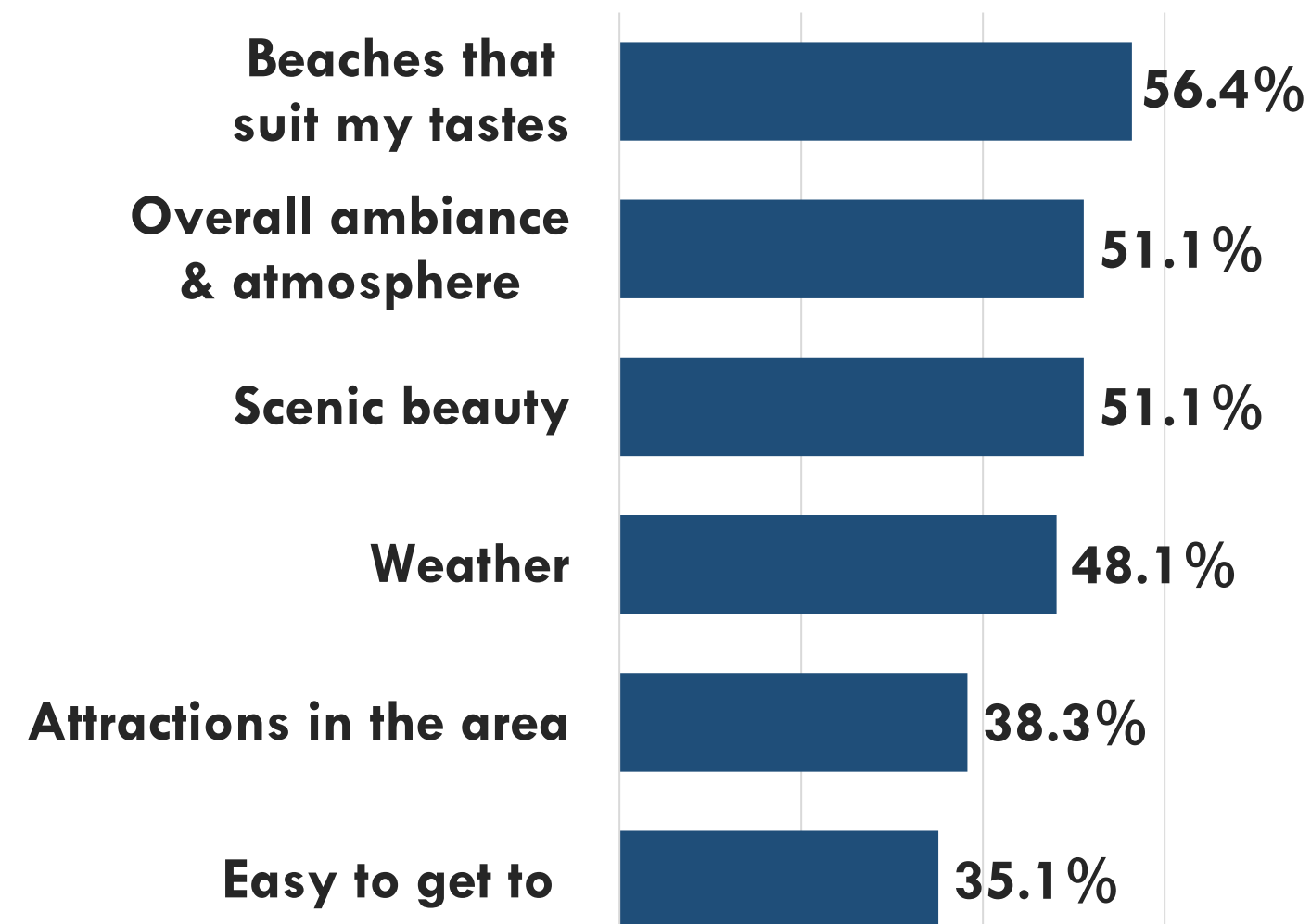
Per Person

THE FAMILY TRAVELER

CY 2022

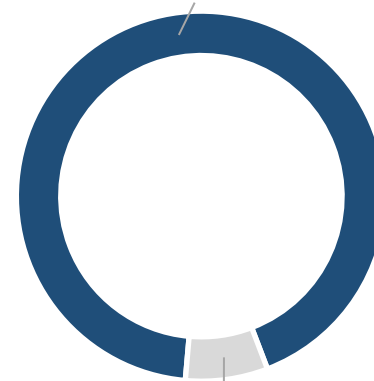
Results presented here are reflective of visitors who were visiting the St. Pete/Clearwater area with children under the age of 18.

Factors Important to Destination Decision



Domestic vs. International

United States Resident,
92.8%



International
Visitor, 7.2%

POINT OF ORIGIN: TOP STATES

Florida	25.5%
Ohio	6.0%
Illinois	5.8%

Top Communities Visited

Madeira Beach	45.0%
Clearwater Beach	40.2%
St. Petersburg	39.1%
Treasure Island	27.7%
St. Pete Beach	19.8%

Top Activities



84.7%

Visit the
beach



82.3%

Dining in
restaurants



57.5%

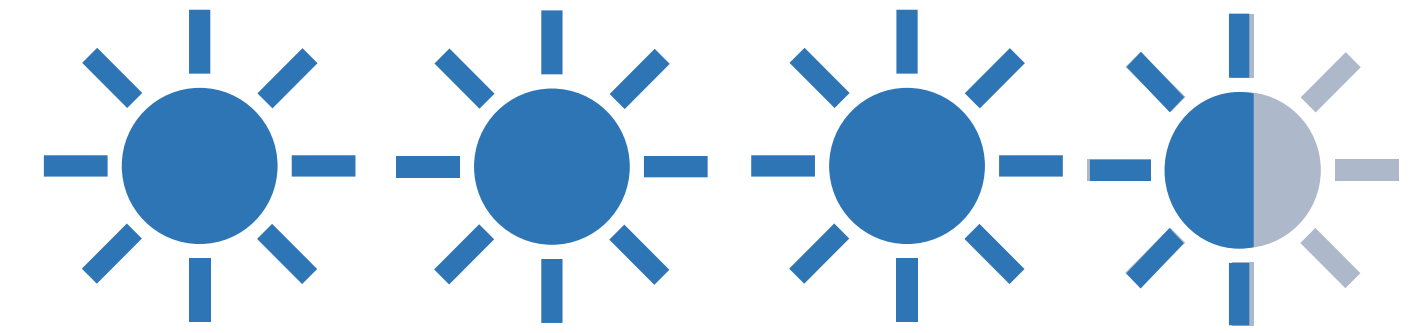
Shopping



49.9%

Swimming

Length of Stay



3.6 Days on Average

Travel Party Size



4.2 People

100% Traveled with Children

Daily Spending



\$95.33

Per Person



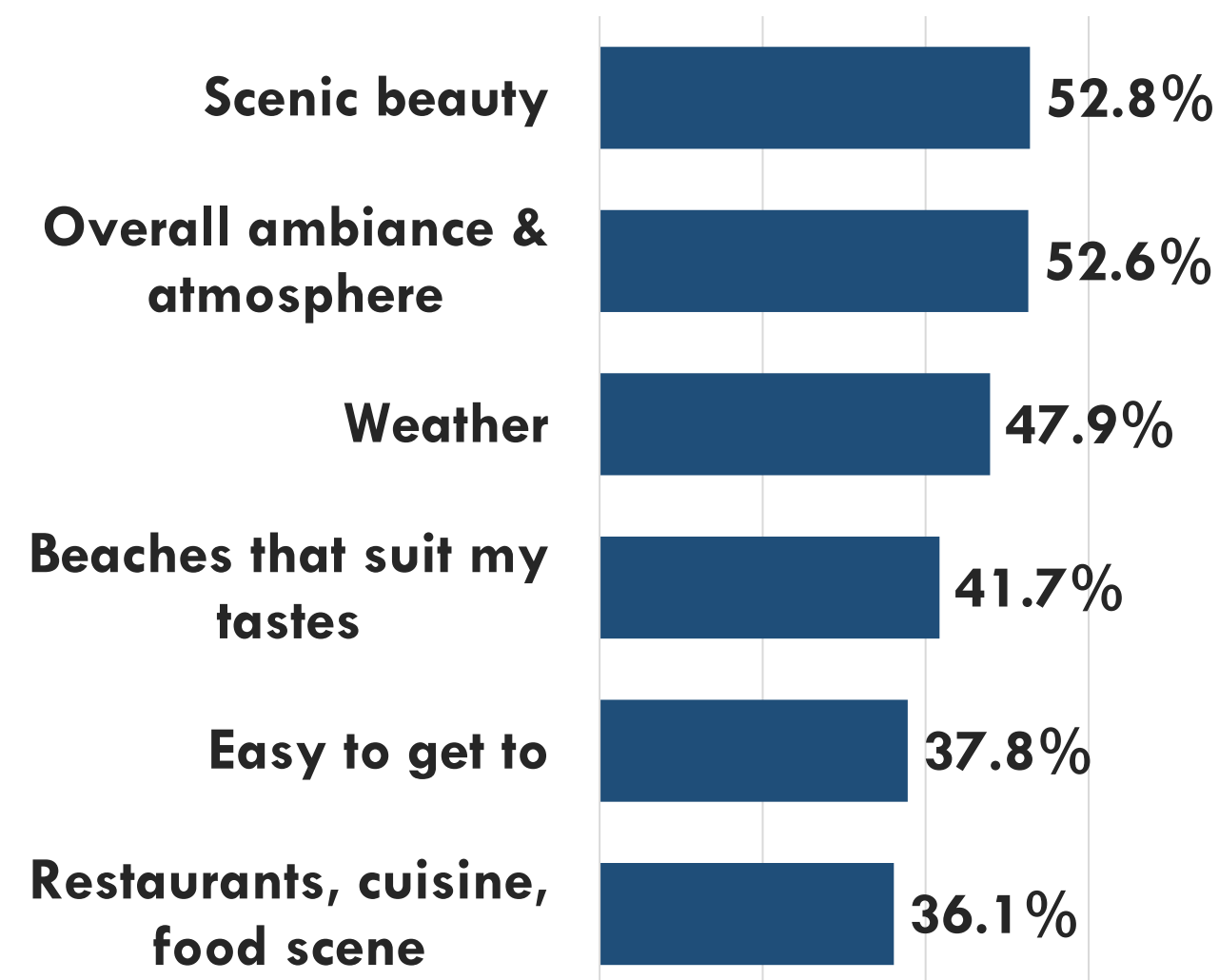
2022 Visitor Summaries by Generation

THE MILLENNIAL VISITOR

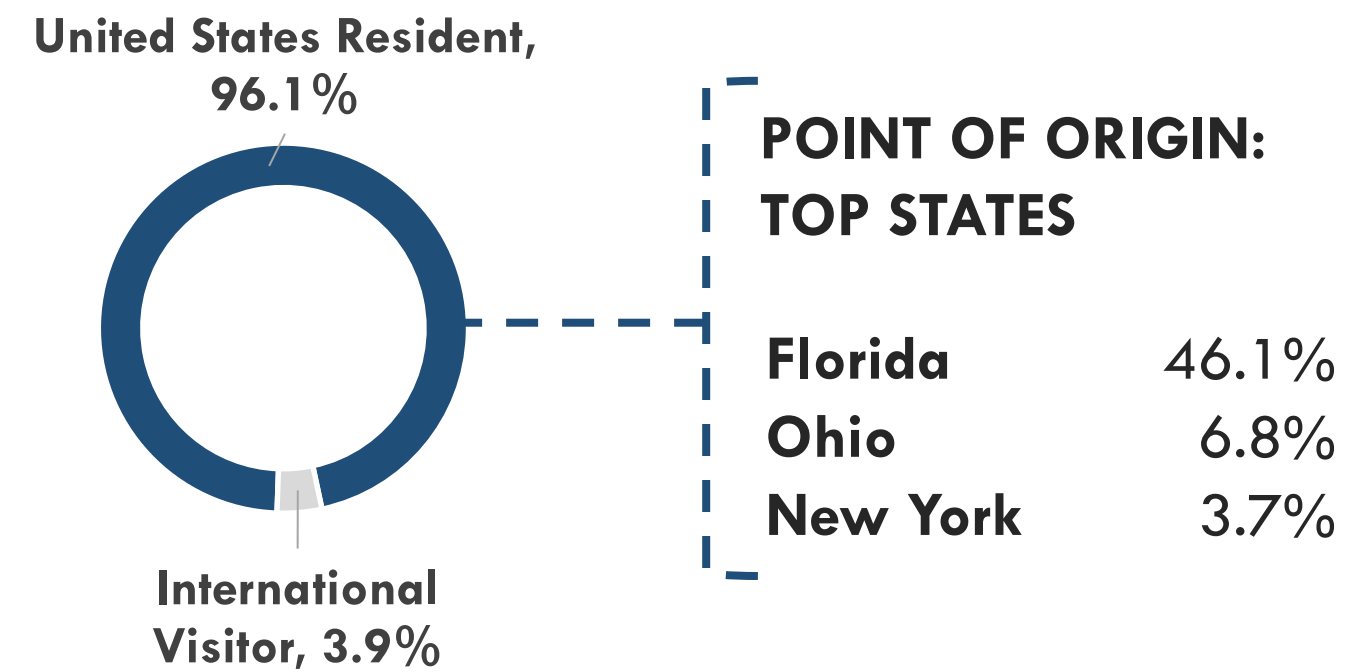
C4 2022

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

Factors Important to Destination Decision



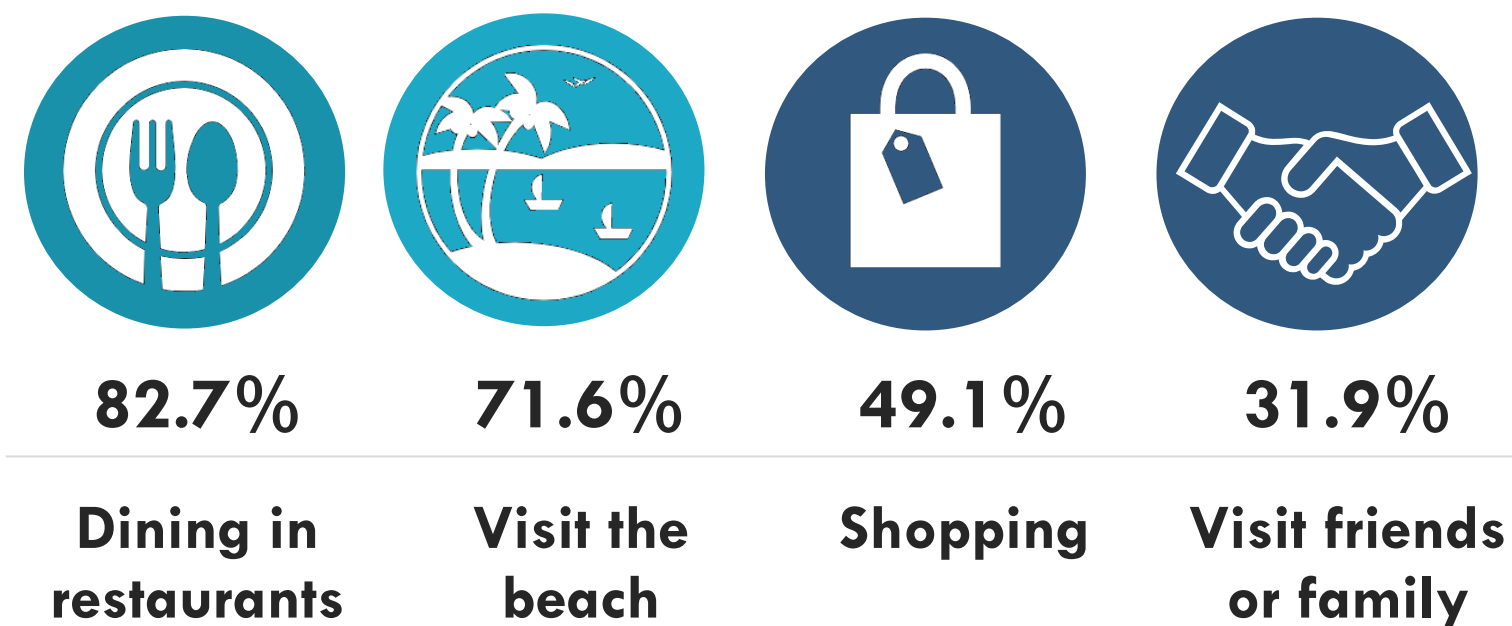
Domestic vs. International



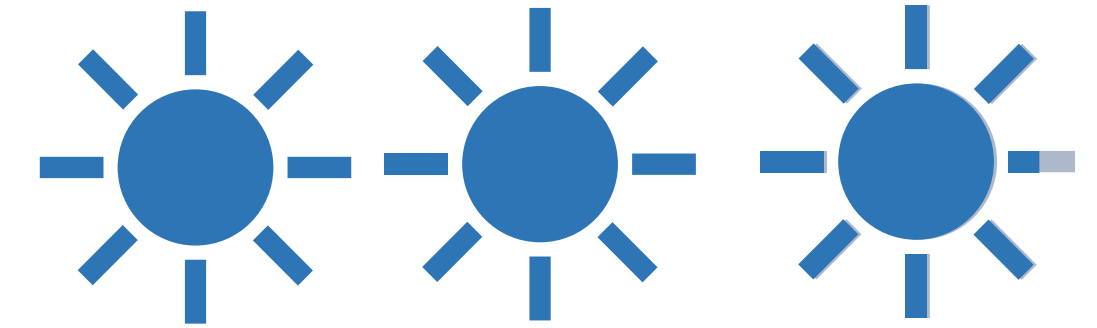
Top Communities Visited

St. Petersburg	50.5%
Madeira Beach	43.5%
Clearwater Beach	26.9%
Treasure Island	23.5%
St. Pete Beach	20.0%

Top Activities

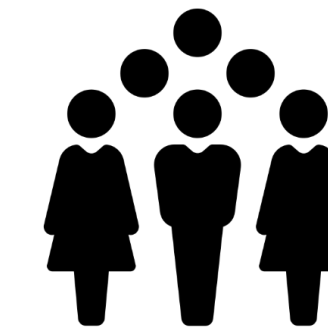


Length of Stay



2.9 Days on Average

Travel Party Size



2.4 People

14.9% Traveled with Children

Daily Spending



\$115.11

Per Person

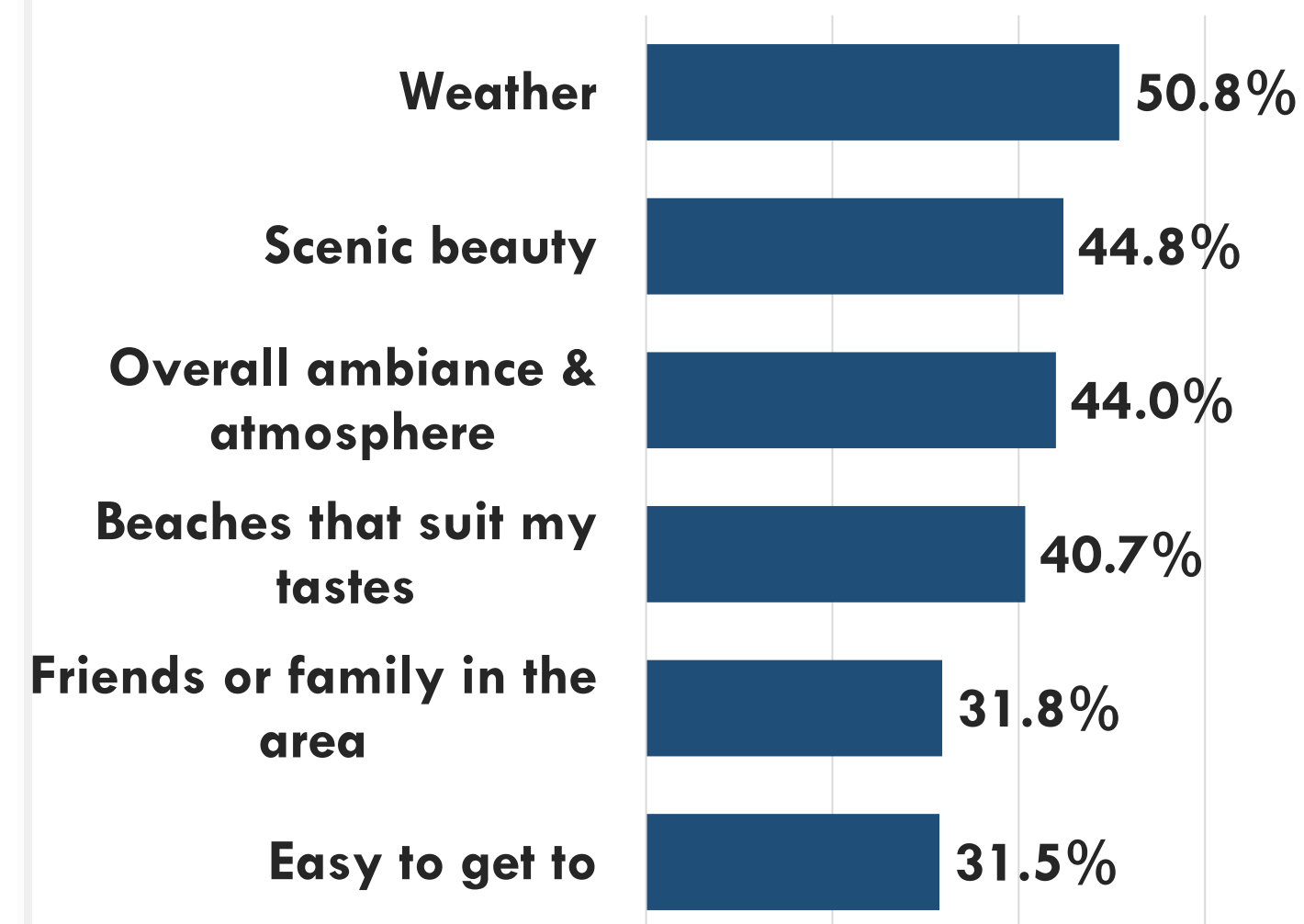


THE GEN X VISITOR

C4 2022

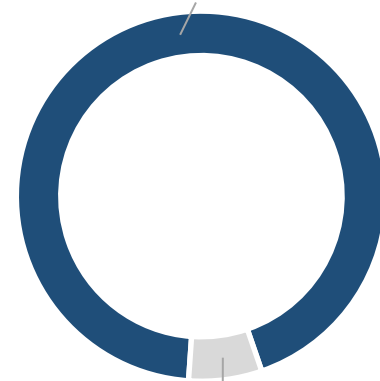
Results presented here are reflective of visitors between the age of 41-57.

Factors Important to Destination Decision



Domestic vs. International

United States Resident,
93.6%



International
Visitor, 6.4%

POINT OF ORIGIN: TOP STATES

Florida	28.7%
Ohio	6.4%
Illinois	4.8%

Top Communities Visited

Madeira Beach	41.9%
St. Petersburg	40.5%
Clearwater Beach	36.9%
Treasure Island	27.2%
St. Pete Beach	21.7%

Top Activities



79.4%

Visit the
beach



76.9%

Dining in
restaurants



55.6%

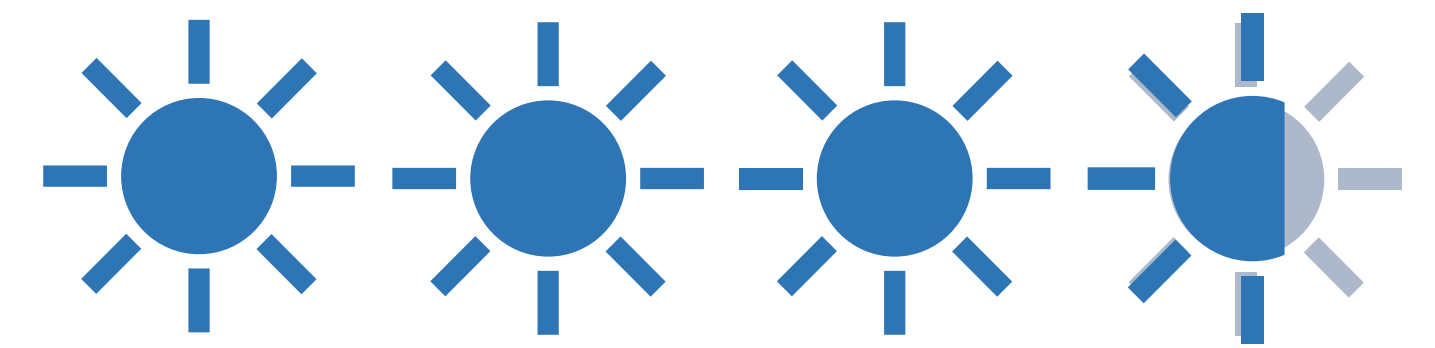
Shopping



37.6%

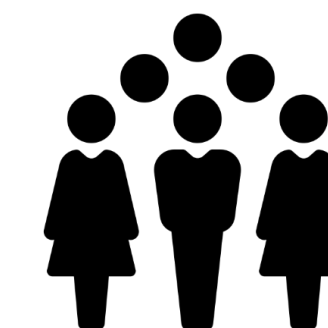
Swimming

Length of Stay



3.7 Days on Average

Travel Party Size



2.8 People

33.9% Traveled with Children

Daily Spending



\$121.83

Per Person

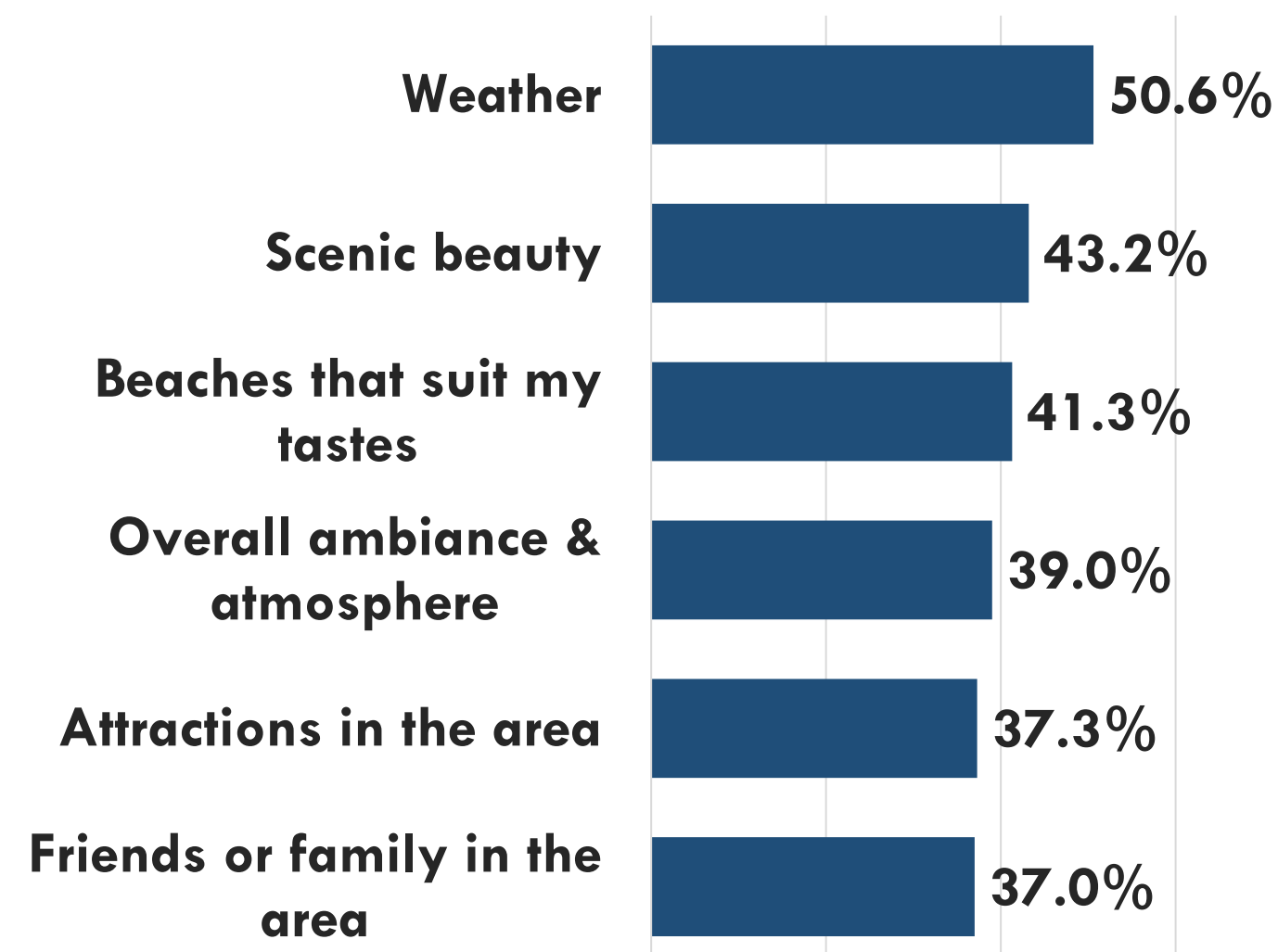


THE BABY BOOMER VISITOR

CY 2022

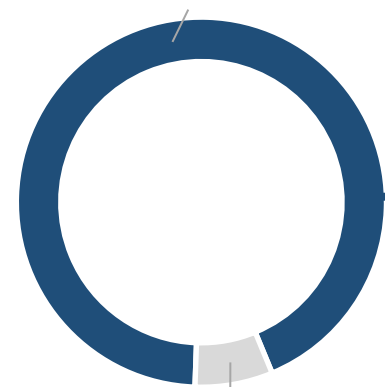
Results presented here are reflective of visitors between the age of 58-76.

Factors Important to Destination Decision



Domestic vs. International

United States Resident,
93.2%



International
Visitor, 6.8%

POINT OF ORIGIN: TOP STATES

Florida	33.8%
New York	6.4%
Illinois	5.5%

Top Communities Visited

St. Petersburg	49.7%
Madeira Beach	39.6%
Clearwater Beach	29.0%
St. Pete Beach	19.0%
Treasure Island	18.6%

Top Activities



82.5%

Dining in
restaurants



70.0%

Visit the
beach



57.2%

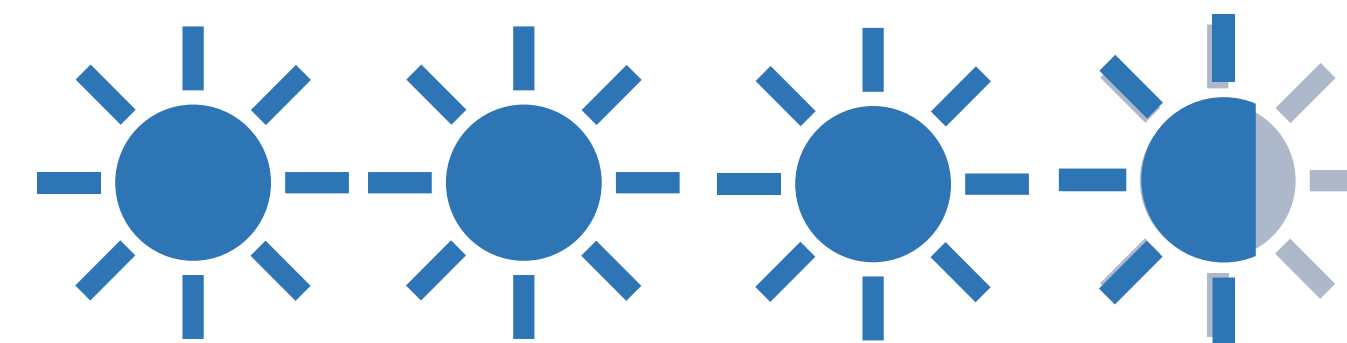
Shopping



36.4%

Visit friends
or family

Length of Stay



3.7 Days on Average

Travel Party Size



2.4 People

5.8% Traveled with Children

Daily Spending



\$128.42

Per Person





Planning the St. Pete/Clearwater Trip

When Decision to Visit was Made

In 2022, St. Pete/Clearwater area visitors made the decision to visit 8.5 weeks, or 59.6 days, in advance of their trip, adding a week to the planning process compared to a year ago (50.9 days; 7.3 weeks). Hotel Guests plan furthest ahead, making the decision three months in advance (92.6 days), followed by VFRs at two months (63.9 days). In contrast, the average day tripper made the decision to visit about a month in advance (35.8 days).

Figure 1: Average Time Between Decision to Visit and Arrival



Question: Approximately how many days, weeks or months before you arrived did you make the decision to visit the St. Pete/Clearwater area for this trip? Base: All Respondents. 5,134 responses.

Detail by Type of Visitor

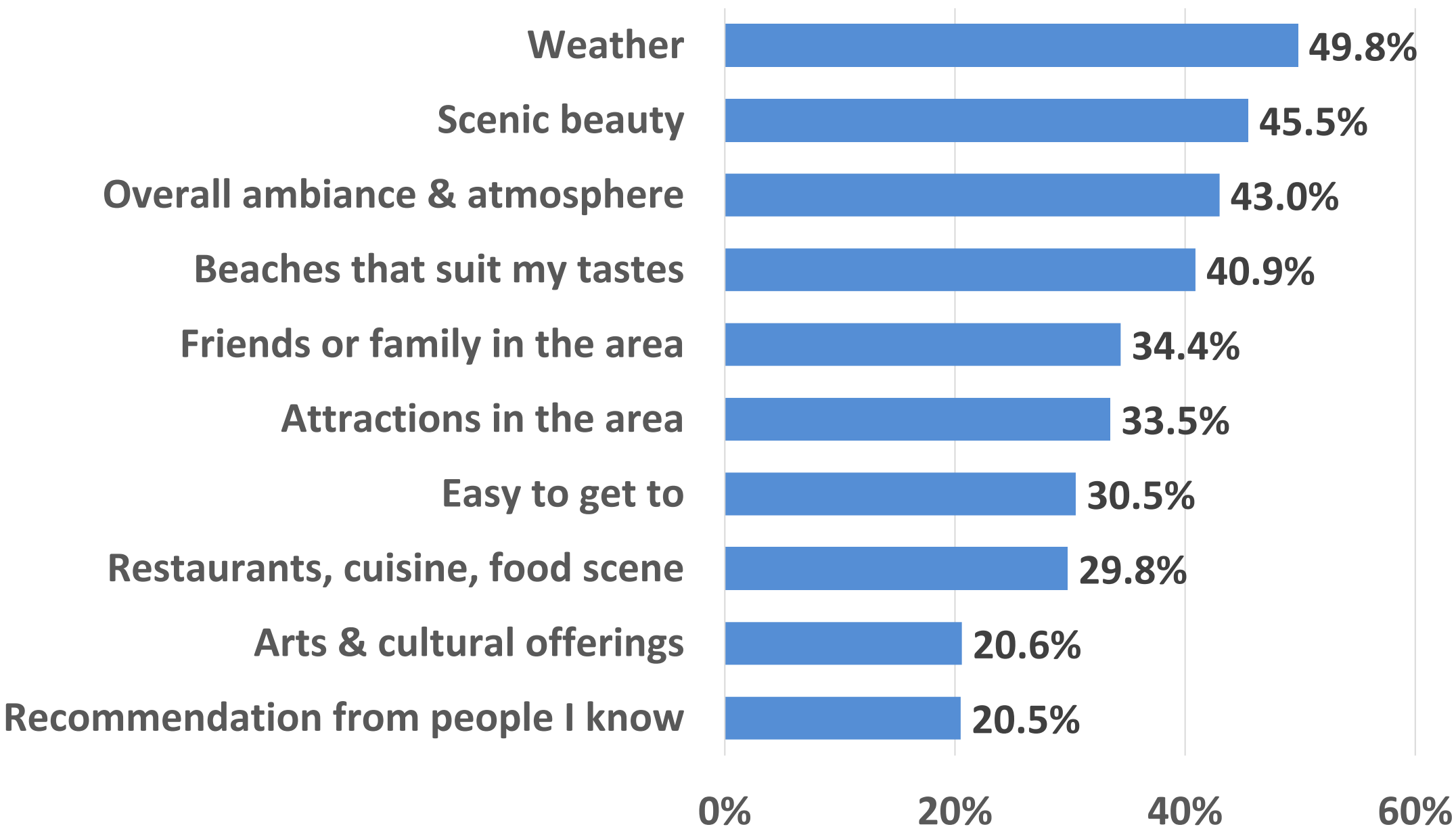
	Hotel	VFR	Day Trip
Average Days	92.6	63.9	35.8
Sample Size:	1,456	819	1,456

Important Factors to Destination Decision

Half of St. Petersburg visitors cited weather as important to drawing them to the area, the top factor in 2022 (49.8%). Scenic beauty (45.4%), overall ambiance/atmosphere (43.0%) and beaches that suit my tastes (40.9%) were other leading factors. Of the 28 factors presented, the same ones top the list in importance as in the past, although somewhat rearranged. Additionally, most of these factors exceed the level reported in 2021 (except these three: a specific attraction, lifelong desire, and sports/sporting events).

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. 5,000 responses.

Detail by Type of Visitor

	Hotel	VFR	Day Trip
Weather	60.6%	63.8%	39.3%
Scenic beauty	45.6%	56.0%	42.6%
Overall ambiance & atmosphere	46.6%	50.0%	37.1%
Beaches that suit my tastes	48.4%	45.9%	36.5%
Friends or family in the area	20.0%	75.2%	35.3%
Attractions in the area	32.3%	38.7%	35.0%
Easy to get to	23.1%	41.3%	29.8%
Restaurants, cuisine, food scene	27.4%	41.4%	28.3%
Arts & cultural offerings	15.6%	28.0%	23.1%
Recommendation from people I know	19.0%	37.5%	16.5%
Sample Size:	1,364	809	1,431

Important Factors to Destination Decision – Full Detail

	Total	Hotel	VFR	Day Trip
Weather	49.8%	60.6%	63.8%	39.3%
Scenic beauty	45.5%	45.6%	56.0%	42.6%
Overall ambiance & atmosphere	43.0%	46.6%	50.0%	37.1%
Beaches that suit my tastes	40.9%	48.4%	45.9%	36.5%
Friends or family in the area	34.4%	20.0%	75.2%	35.3%
Attractions in the area	33.5%	32.3%	38.7%	35.0%
Easy to get to	30.5%	23.1%	41.3%	29.8%
Restaurants, cuisine, food scene	29.8%	27.4%	41.4%	28.3%
Arts & cultural offerings	20.6%	15.6%	28.0%	23.1%
Recommendation from people I know	20.5%	19.0%	37.5%	16.5%
Shopping opportunities	18.2%	15.9%	30.3%	18.2%
St. Pete Pier	13.9%	11.5%	27.3%	14.3%
The area's unique culture	13.9%	12.2%	26.0%	14.0%
The St.Pete/Clearwater area is family-friendly	13.5%	13.7%	28.0%	12.4%
Outdoor recreational opportunities	12.1%	18.9%	19.8%	9.0%
Breweries/Distilleries/Craft beer scene	11.7%	9.2%	27.2%	11.4%
The St.Pete/Clearwater area is romantic	10.4%	14.0%	20.9%	8.7%
Advertisements for the area	9.8%	9.3%	24.9%	8.7%
Articles, features, reviews, etc. about the area	7.4%	10.8%	14.9%	5.6%
Appealing hotels/resorts and other lodging options	4.8%	17.4%	0.6%	0.7%
Special event(s) and/or festival(s)	4.0%	3.5%	2.9%	4.8%
A specific attraction:	3.9%	4.7%	1.5%	4.4%
Fishing opportunities	3.8%	4.1%	6.8%	3.0%
Good hotel rate	2.2%	9.5%	0.4%	0.1%
Good deal on airfare	1.4%	3.4%	0.6%	0.7%
Golf	1.2%	1.3%	0.4%	1.4%
Lifelong desire to visit	0.8%	2.2%	1.0%	0.4%
Sports or sporting events	0.8%	1.3%	0.5%	0.6%
Sample Size:	5,000	1,364	809	1,431

Noteworthy differences between visitor types:

- **A larger share of Hotel Guests** than day trippers focused on the area's weather (60.6%), appealing hotel/resort/lodging options (17.4%), beaches (48.4%), outdoor recreation (18.9%), and overall ambiance/atmosphere (46.6%).
- **Day trip visitors**, compared to hotel guests, paid more attention to arts & cultural offerings (23.1%). Also, since they come just for the day, being easy to get to (29.8%) was important.
- In addition to visiting friends/family (75.2%), more **VFR visitors** listened to recommendations from others (37.5%). Perhaps as a result, they select most non-hotel-related aspects more often than other visitor types, especially the St. Pete Pier (27.3%) and the brewery/distillery scene (27.2%). They also emphasize easy to get to (41.3%) and more often notice ads for the area (24.9%).

Question: Which of the following were IMPORTANT to your decision to take this trip to St. Pete/Clearwater area? (Select all that apply)

Base: All Respondents. 5,000 responses.

Travel Planning Resources Used

Visitors relied heavily on user-generated content/review websites, opinions of friends/relatives, and social media content as travel planning resources both prior to arrival and while in-market. In addition, one-in-five visitors (19.1%) used the official Visit St. Pete/Clearwater website before arrival, slipping from 2021 (27.6%), but still above the 2020 level (16.9%). A few (0.7%) continued to use it while there.

Figure 3: Travel Planning Resources Used

	Used Before Arrival	Used In Market
User-generated content/Review websites, such as Yelp and TripAdvisor	42.4%	28.7%
Opinions of friends or relatives	35.7%	15.7%
Social Media content	31.2%	23.7%
Online travel agencies (Expedia, Travelocity, etc.)	24.3%	0.5%
Official area tourism website, www.VisitStPeteClearwater.com	19.1%	0.7%
Travel guides, brochures	5.7%	11.3%
YouTube or other online videos	2.9%	0.5%
Television programming	2.0%	0.5%
Radio programming	1.7%	0.7%
Travel agency (traditional, offline)	1.3%	0.2%
Lifestyle or travel magazines	0.8%	1.5%
Newspaper travel section	0.5%	1.6%
Gulf to Bay St Pete/Clearwater Destination Magazine	0.2%	0.2%

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. 5,134 responses.

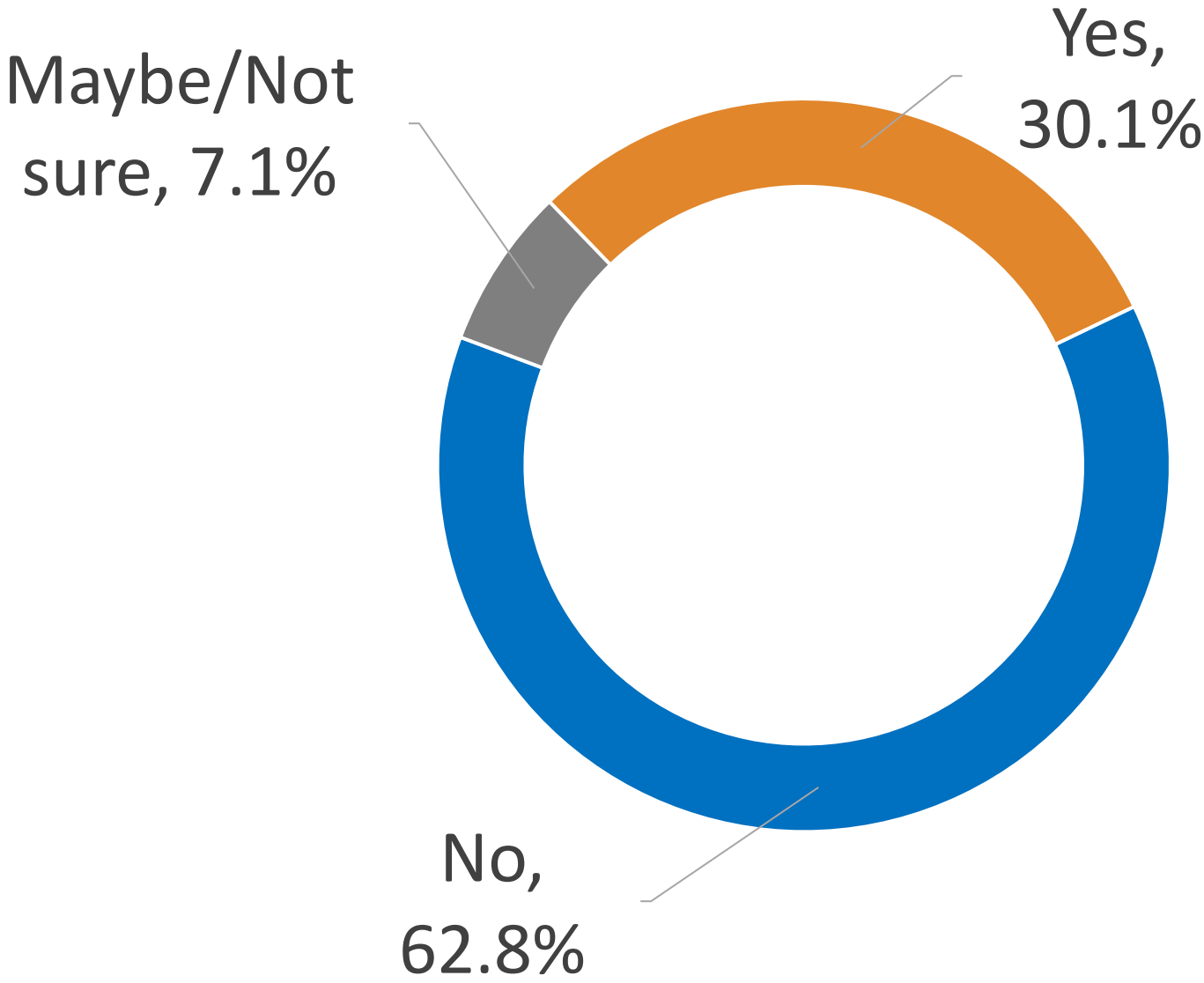
Detail by Type of Visitor

	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	54.6%	42.9%	45.4%	29.8%	36.0%	20.6%
Opinions of friends or relatives	25.7%	13.7%	59.0%	22.9%	37.6%	15.6%
Social Media content	32.4%	23.5%	40.9%	30.0%	26.0%	18.7%
Online travel agencies (Expedia, Travelocity, etc.)	33.0%	1.3%	20.9%	0.9%	20.5%	0.1%
Official area tourism website, www.VisitStPeteClearwater.com	18.5%	1.0%	28.1%	0.8%	13.8%	0.3%
Travel guides, brochures	7.3%	18.6%	4.5%	25.4%	5.3%	6.6%
YouTube or other online videos	5.7%	0.8%	4.8%	0.6%	1.9%	0.3%
Television programming	1.1%	1.0%	0.3%	1.0%	2.6%	0.1%
Radio programming	0.7%	0.4%	0.1%	1.1%	2.4%	0.5%
Travel agency (traditional, offline)	1.6%	0.1%	0.6%	0.1%	1.4%	0.2%
Lifestyle or travel magazines	0.6%	2.4%	0.7%	6.2%	0.8%	0.6%
Newspaper travel section	0.3%	3.0%	0.8%	4.7%	0.5%	0.7%
Gulf to Bay St Pete/Clearwater Destination Magazine	0.6%	0.8%	0.2%	0.2%	0.0%	0.0%
Sample Size:	1,456		819		1,456	

Earned & Paid Media Recall

Retreating from recent highs, a third of St. Pete/Clearwater area visitors recalled seeing, hearing or reading earned media or advertisements/promotions for the destination in the past six months (30.1% in CY 2022, from 39.8% in 2021 and 36.9% in 2020). Day-trippers were most likely to recall any earned or paid media (29.5% Hotel Guests; 33.2% day trippers); fewer VFRs noticed (25.3%).

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 5,069 responses.

Detail by Type of Visitor

	Hotel	VFR	Day Trip
Yes	29.5%	25.3%	33.2%
No	64.6%	70.5%	58.7%
Maybe/Not sure	5.9%	4.2%	8.1%
Sample Size:	1,440	811	1,427

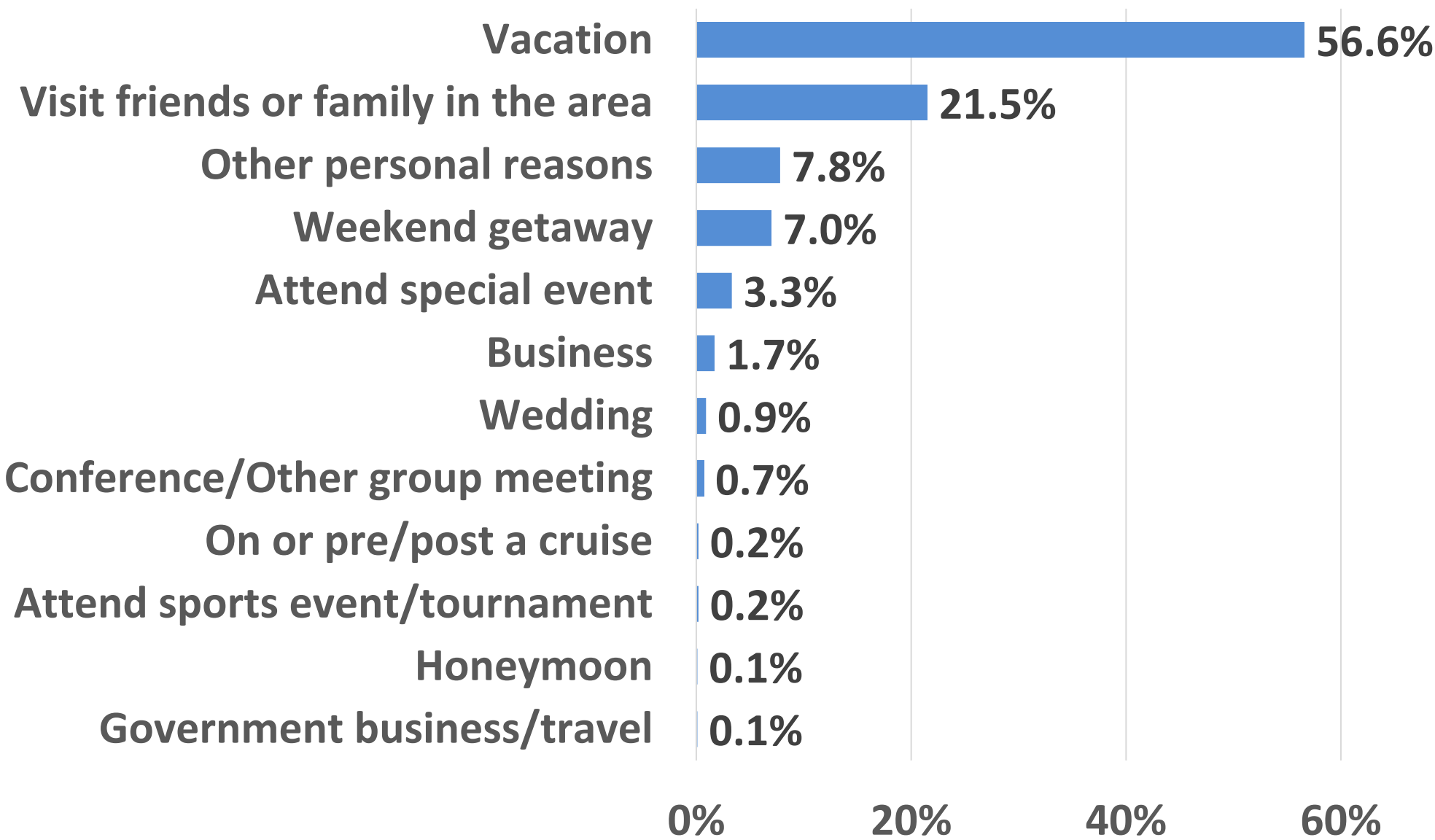


Visitor Trip Details

Primary Reason for Visit

Nearly identical to the two-year-ago level, more than half of St. Pete/Clearwater visitors described their trip as a vacation (56.6% vs. 51.6% in 2021 and 56.2% in 2020). Another one-in-five (21.5%) came to visit friends or family; no other purpose exceeds 10 percent. Of the segments, Hotel Guests were most likely to say that they came to St. Pete/Clearwater for vacation (75.1%). Day trippers also claimed vacations (46.4%) as their top reason and ranked visiting friends/family next-in-line (25.2%). They (day trippers) list other personal reasons (12.3%) far more often than the other two groups. As expected, VFR visitors most often came to visit friends/family in the area (53.6%).

Figure 5: Primary Reason for Visit



Question: What is your primary reason for visiting the St. Pete/Clearwater Area? (Select one)
Base: All Respondents. 5,007 responses.

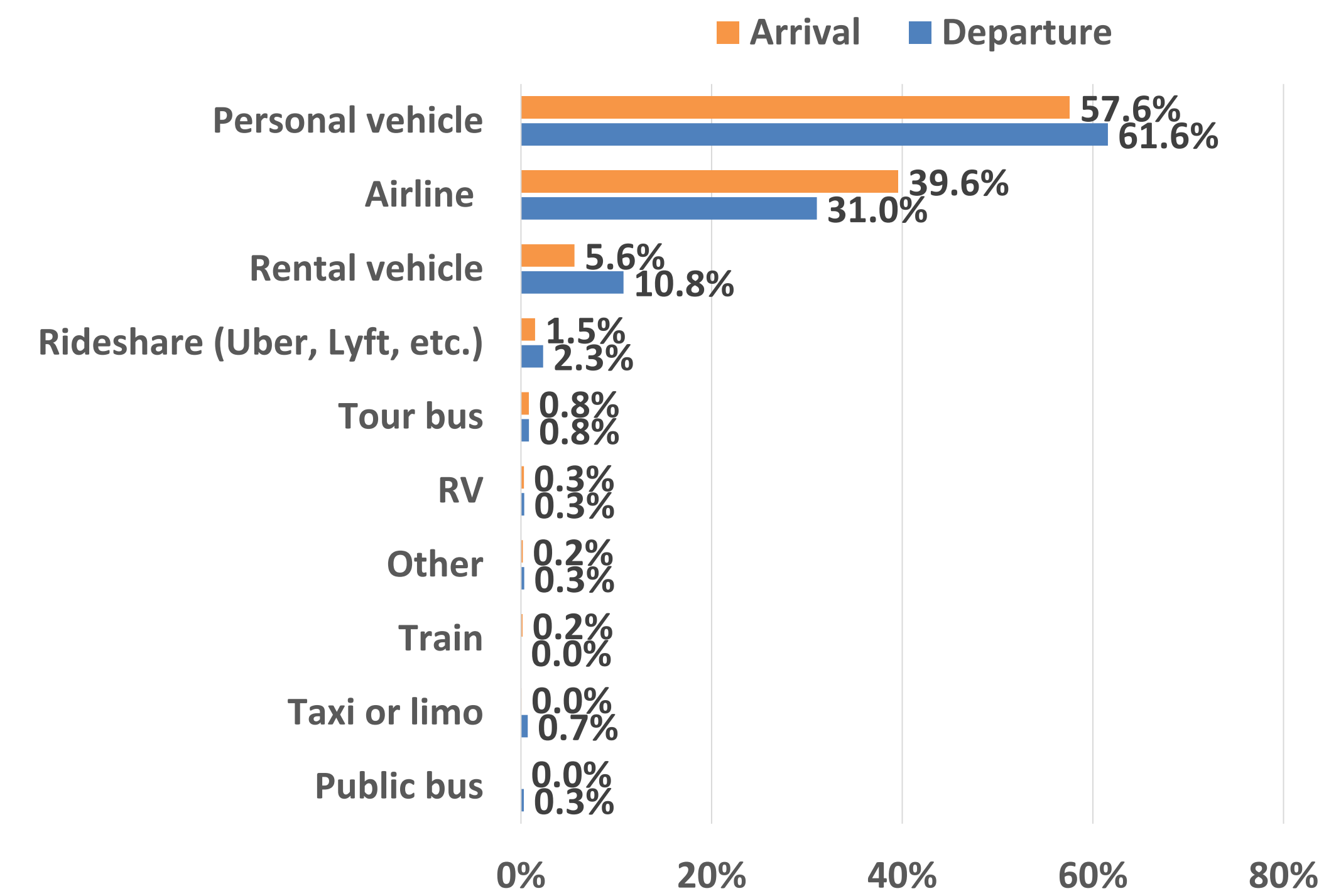
Detail by Type of Visitor

	Hotel	VFR	Day Trip
Vacation	75.1%	38.7%	46.4%
Visit friends or family in the area	4.9%	53.6%	25.2%
Other personal reasons	0.9%	3.2%	12.3%
Weekend getaway	7.8%	3.2%	8.1%
Attend special event	0.4%	0.1%	5.6%
Business	4.6%	0.6%	1.2%
Wedding	2.9%	0.4%	0.3%
Conference/other group meeting	1.9%	0.0%	0.6%
On or pre/post a cruise	0.2%	0.3%	0.3%
Attend sports event/tournament	0.5%	0.0%	0.2%
Honeymoon	0.6%	0.0%	0.0%
Government business/travel	0.2%	0.0%	0.1%
Sample Size:	1,454	817	1,332

Method of Arrival & Departure

Personal vehicle, airline and rental vehicle continue to be the top methods of arrival and departure for St. Pete/Clearwater area visitors. Nearly three-in-five visitors surveyed arrived by personal vehicle (57.6%, slightly less than in 2021 at 61.6%), more than a third by airline (39.6%, similar to 2021 at 37.8%), and a few (5.6% vs. 6.0% in 2021) by rental vehicle. Day trippers remained the most likely segment to arrive by personal vehicle (67.9%), followed by VFRs (56.3%). In contrast, the majority of Hotel Guests arrived by air (60.6%).

Figure 6: Method of Arrival and Departure



Question: How did you arrive to the St. Pete/Clearwater area and how will you leave? (Select all that apply) Base: All Respondents. 5,144 responses.

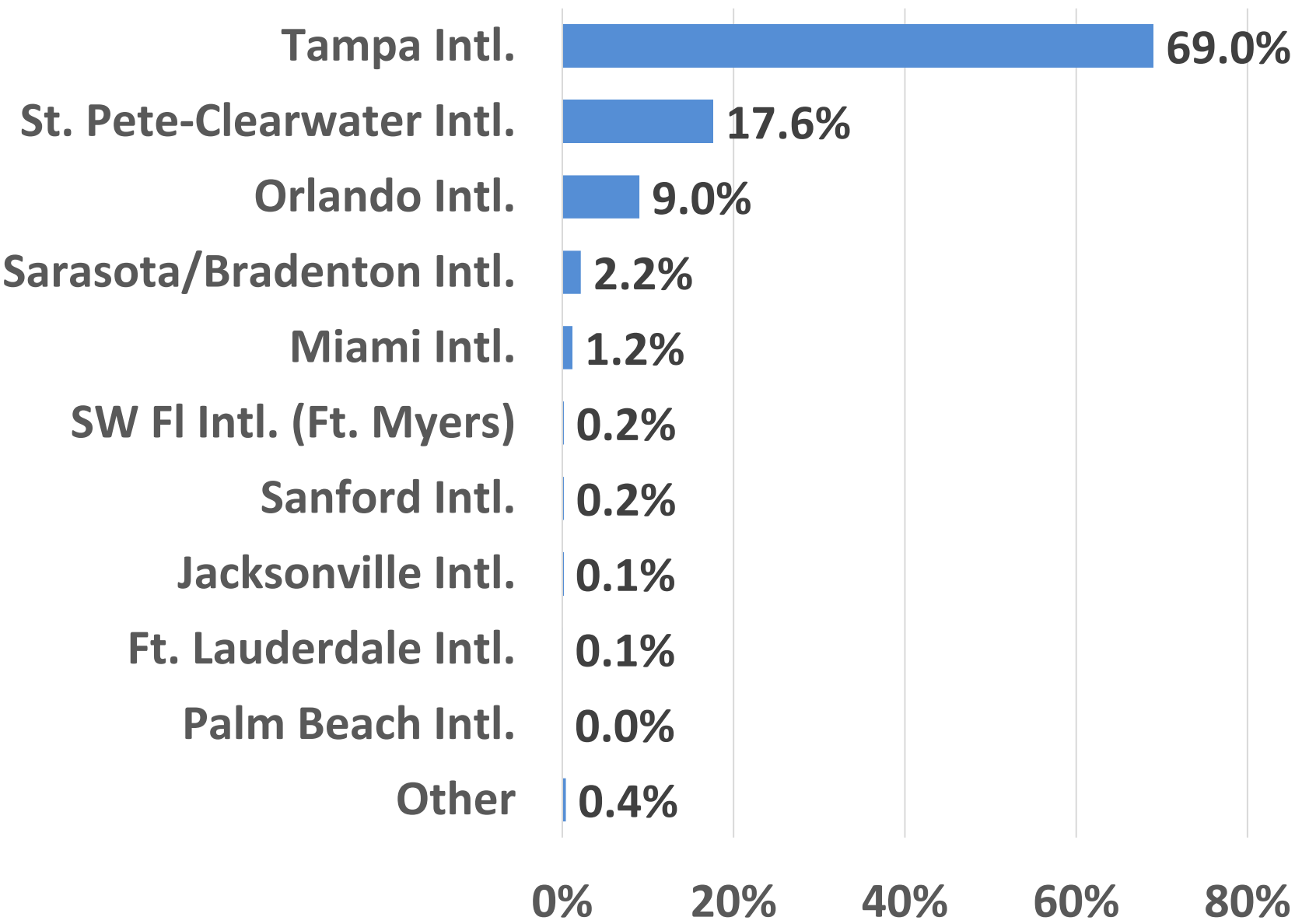
Detail by Type of Visitor

	Hotel		VFR		Day Trip	
	Arrival	Departure	Arrival	Departure	Arrival	Departure
Personal vehicle	36.4%	38.9%	56.3%	65.0%	67.9%	72.1%
Airline	60.6%	47.4%	46.1%	40.3%	28.4%	20.5%
Rental vehicle	6.5%	17.8%	1.2%	2.9%	6.5%	9.0%
Rideshare (Uber, Lyft, etc.)	4.5%	8.0%	0.3%	0.5%	0.8%	0.8%
Tour bus	0.1%	0.1%	0.1%	0.3%	1.3%	1.3%
RV	0.1%	1.9%	0.0%	0.3%	0.1%	0.5%
Other	0.3%	0.1%	0.3%	0.0%	0.2%	0.2%
Train	0.2%	0.4%	0.2%	0.3%	0.2%	0.3%
Taxi or limo	0.1%	0.4%	0.0%	0.1%	0.0%	0.3%
Public bus	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%
Sample Size:	1,456		819		1,457	

Arrival Airport

Air visitors to St. Pete-Clearwater continued to predominantly, and increasingly, choose to land at Tampa International (69.0% in 2022, up from 59.9% last year and 43.9% in CY 2020). Offsetting that, arrival into St. Pete-Clearwater International decreases over time (17.6% from 26.1% last year and from 42.2% in CY 2020). About one-in-ten (9.0%) flew into Orlando, similar to the past. The majority of all three segments flew into Tampa International (75.4% VFR, 71.3% Hotel Guests, and 61.0% day trippers). However, a much larger share of day trippers than Hotel Guests or VFR visitors landed in Orlando International (13.7%).

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. 2,519 responses.

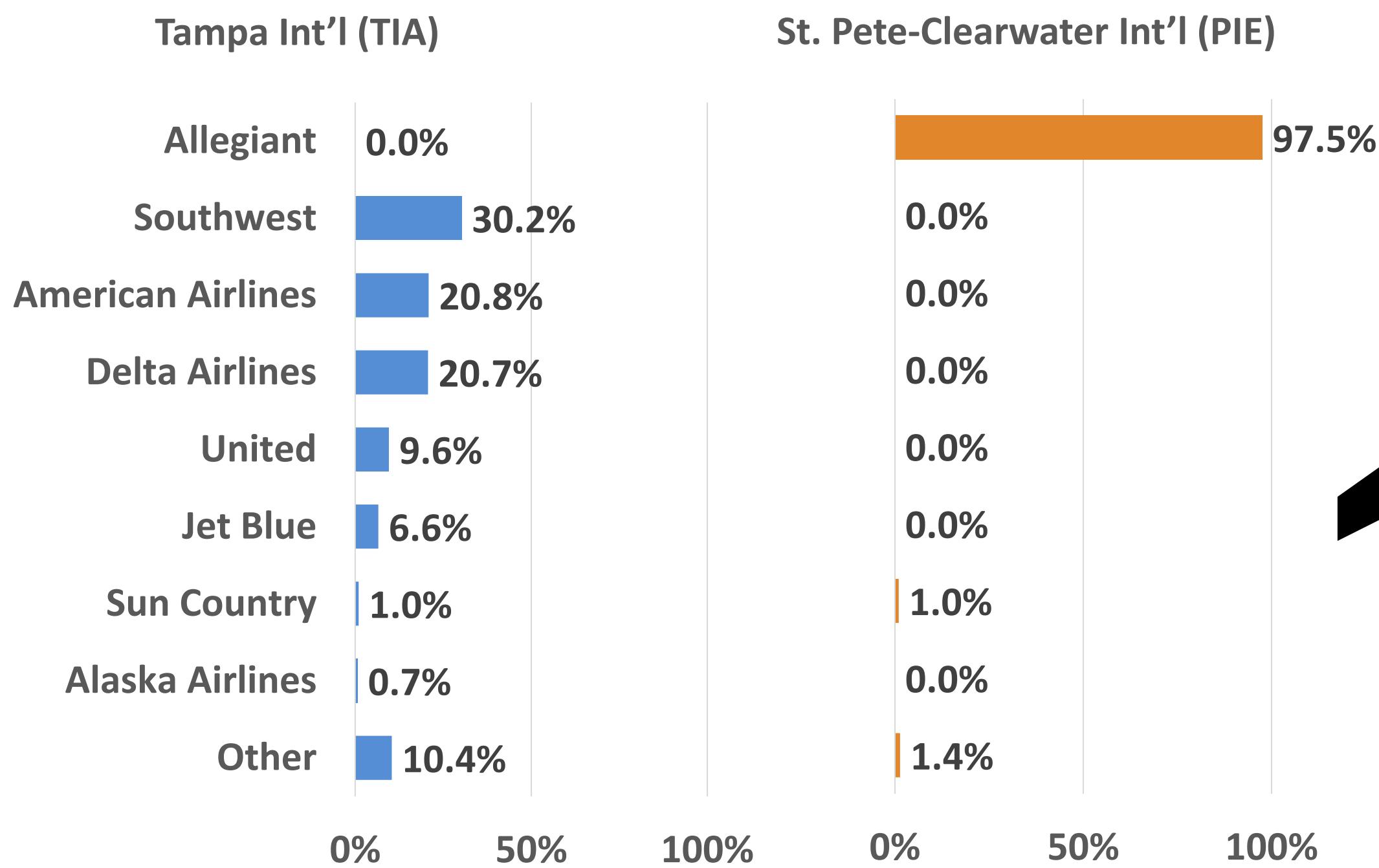
Detail by Type of Visitor

	Hotel	VFR	Day Trip
Tampa Intl.	71.3%	75.4%	61.0%
St. Pete-Clearwater Intl.	18.6%	19.7%	18.5%
Orlando Intl.	7.1%	3.2%	13.7%
Sarasota/Bradenton Intl.	0.7%	1.0%	3.7%
Miami Intl.	1.4%	0.4%	1.5%
SW Fl Intl. (Ft. Myers)	0.2%	0.1%	0.3%
Sanford Intl.	0.0%	0.1%	0.4%
Jacksonville Intl.	0.0%	0.0%	0.3%
Ft. Lauderdale Intl.	0.2%	0.1%	0.0%
Palm Beach Intl.	0.1%	0.0%	0.0%
Other	0.3%	0.1%	0.7%
Sample Size:	906	415	400

Arrival Airline By Airport

All flyers into St. Pete-Clearwater International airport arrived by Allegiant air. Visitors landing at the Tampa Int’l airport most commonly chose Southwest (30.2%), American Airlines (20.8%), or Delta Airlines (20.7%) as their carrier. United falls below 10 percent in 2022 (9.6% from 12.3% in 2021).

Figure 8: Arrival Airline Airport



Detail by Type of Visitor

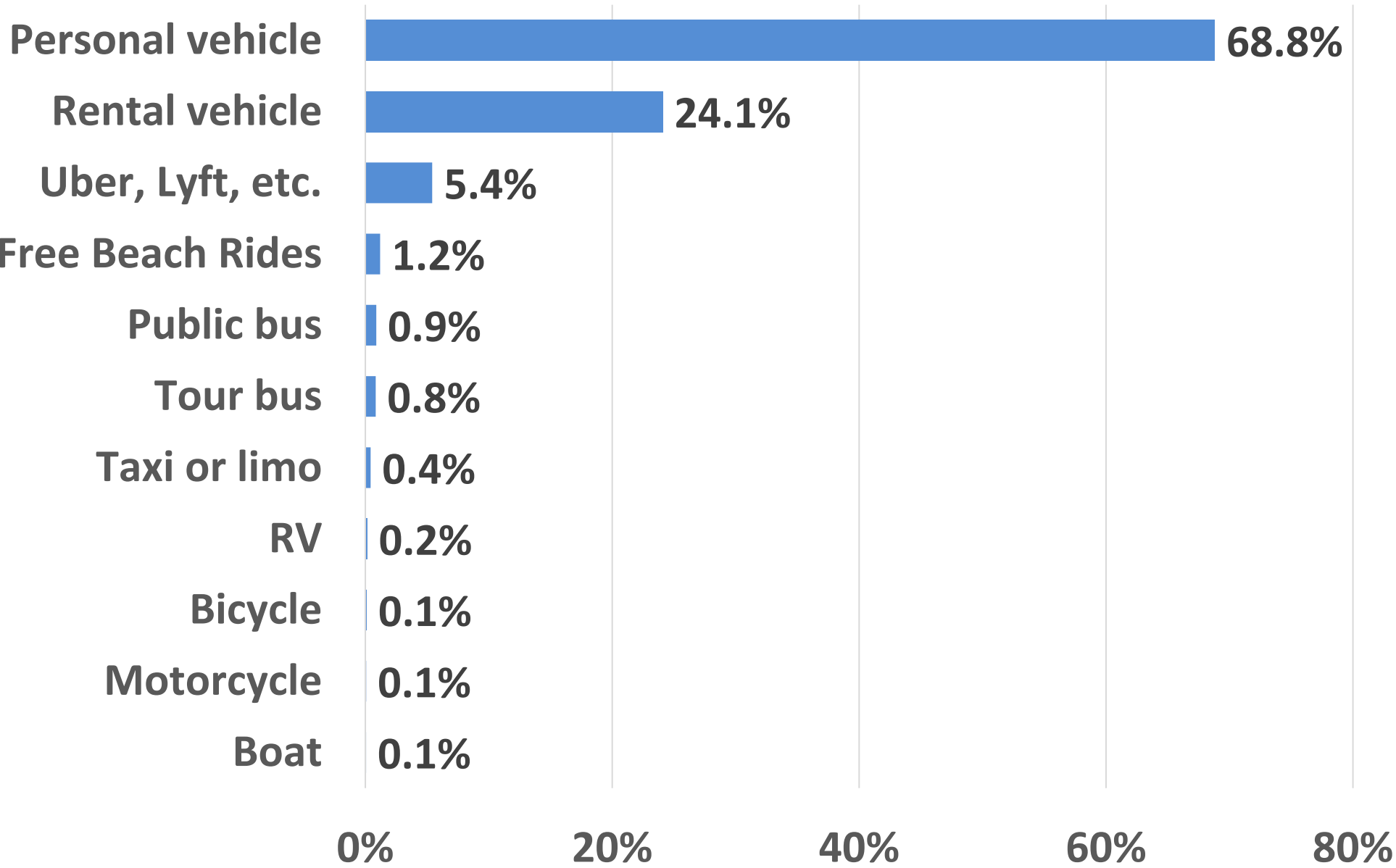
	Hotel		VFR		Day Trip	
	TIA	PIE	TIA	PIE	TIA	PIE
Allegiant	0.0%	97.5%	0.0%	99.5%	0.0%	97.3%
Southwest	25.0%	0.0%	31.1%	0.0%	27.5%	0.0%
American Airlines	21.5%	0.0%	21.7%	0.0%	22.3%	0.0%
Delta Airlines	24.4%	0.0%	22.7%	0.0%	19.9%	0.0%
United	11.3%	0.0%	9.2%	0.0%	9.0%	0.0%
Jet Blue	7.6%	0.0%	5.4%	0.0%	7.2%	0.0%
Sun Country	0.5%	1.0%	0.0%	0.0%	1.4%	1.4%
Alaska Airlines	0.9%	0.0%	0.0%	0.0%	0.9%	0.0%
Other	8.9%	1.4%	9.9%	0.5%	11.8%	1.3%
Sample Size:	823		388		323	

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. 2,279 responses.

Transportation Used In-Market

Most visitors drove their personal vehicle for transportation in market (68.8%, similar to last year’s 71.6%). Another quarter of visitors traveled around Pinellas County in a rental vehicle (24.1%, also similar to CY 2021 at 22.4%). In addition, a few (5.4%) used a ride sharing service such as Uber or Lyft. Hotel Guests rented a vehicle (41.4%), used ride sharing (15.2%), and/or chose other public transportation far more often than other visitor segments to travel around the St. Pete/Clearwater area.

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. 5,133 responses.

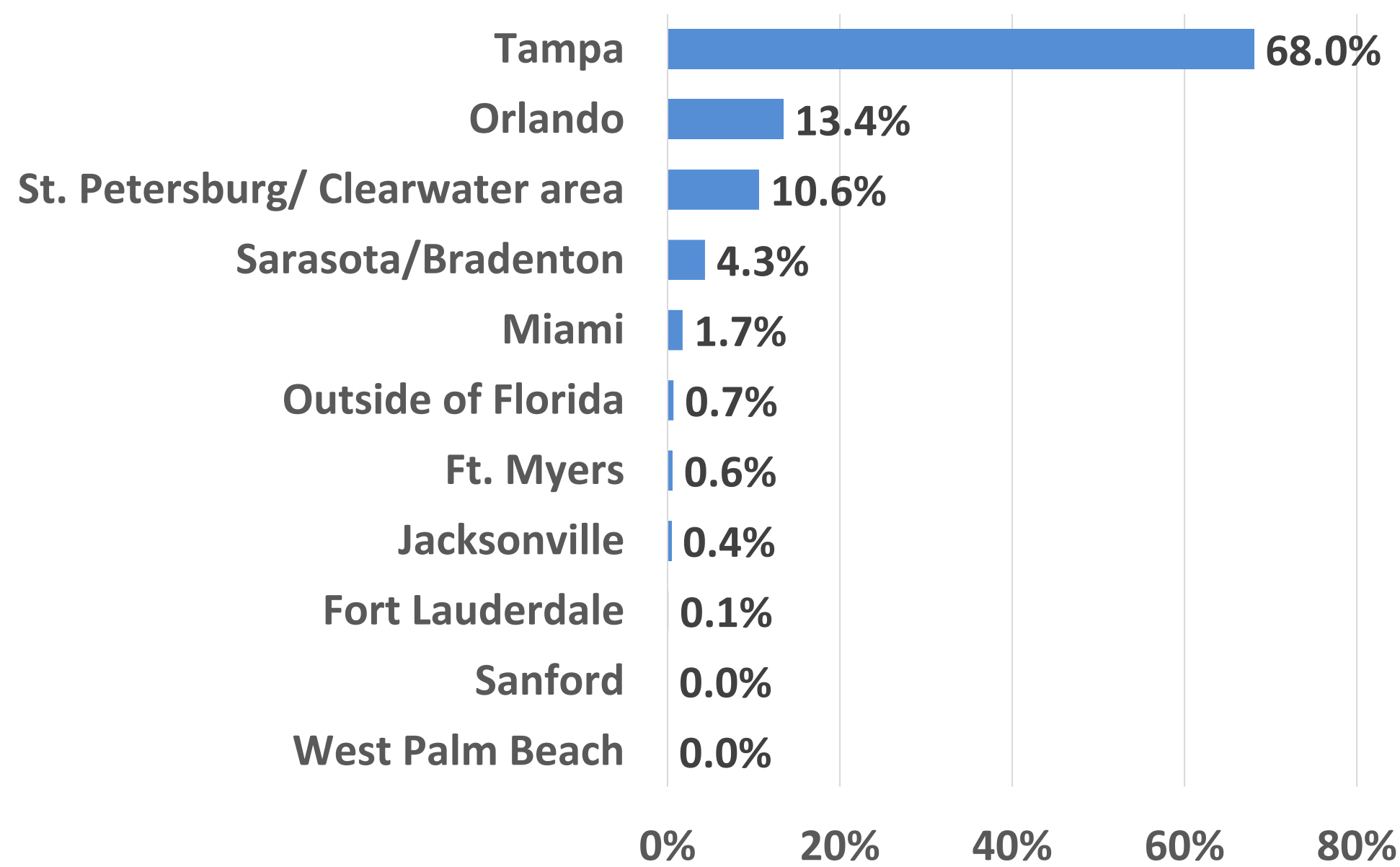
Detail by Type of Visitor

	Hotel	VFR	Day Trip
Personal vehicle	40.8%	84.0%	79.8%
Rental vehicle	41.4%	14.3%	15.4%
Uber, Lyft, etc.	15.2%	4.1%	2.7%
Free Beach Rides	3.3%	0.7%	0.5%
Public bus	2.4%	0.5%	0.5%
Tour bus	0.2%	0.0%	1.3%
Taxi or limo	1.5%	0.1%	0.2%
RV	0.1%	0.0%	0.0%
Bicycle	0.1%	0.3%	0.1%
Motorcycle	0.0%	0.0%	0.1%
Boat	0.2%	0.0%	0.0%
Sample Size:	1,449	818	1,459

Rental Vehicle Pick-Up City

In 2022, two-thirds of visitors who arrived in the St. Pete/Clearwater area by rental car picked up their car in Tampa (68.0%, similar to 65.9% in CY 2021). Orlando (13.4%, similar to 15.0% last year) and St. Pete/Clearwater (10.6%, from 13.0% last year) follow distantly. Hotel Guests were the most likely segment to rent a car in St. Pete/Clearwater (16.5%, nearly matching 16.6% in CY 2021), compared to VFR (9.5%) or day trip visitors (6.5%).

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. 1,637 responses.

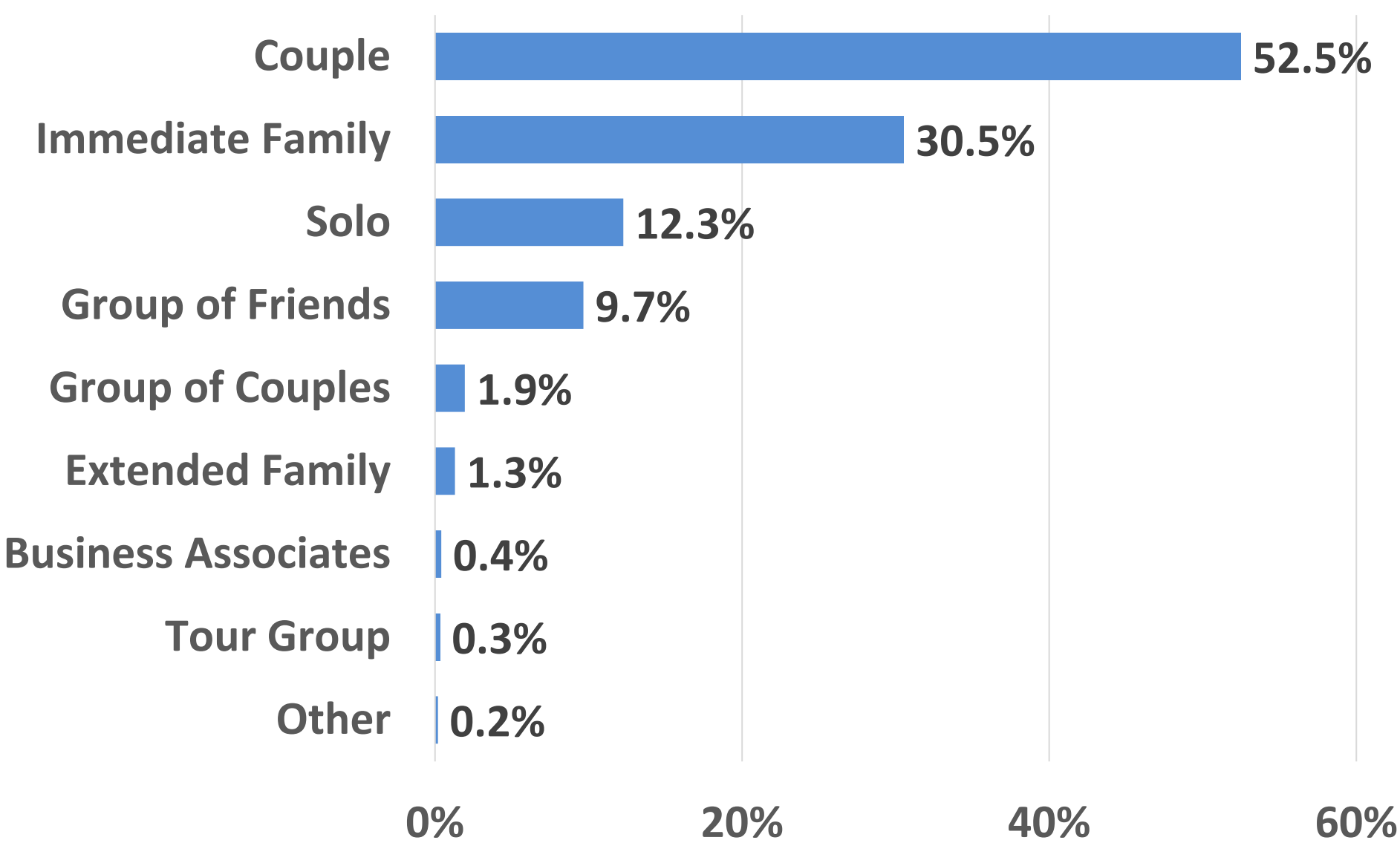
Detail by Type of Visitor

	Hotel	VFR	Day Trip
Tampa	67.5%	85.1%	57.1%
Orlando	11.2%	3.3%	21.8%
St. Petersburg/ Clearwater area	16.5%	9.5%	6.5%
Sarasota/Bradenton	1.1%	0.3%	9.5%
Miami	2.2%	0.0%	2.2%
Outside of Florida	0.5%	1.2%	0.9%
Ft. Myers	0.6%	0.3%	0.9%
Jacksonville	0.2%	0.0%	0.9%
Fort Lauderdale	0.1%	0.0%	0.0%
Sanford	0.0%	0.3%	0.0%
West Palm Beach	0.0%	0.0%	0.0%
Sample Size:	607	126	227

Travel Party Composition

Similar to prior years, St. Pete/Clearwater area visitors most commonly traveled as a couple in 2022 (52.5% vs. 47.8% in 2021 and 50.6% in 2020). Another third continues to come with immediate family (30.5% vs. 29.5% in 2021 and 32.5% in 2020). Hotel Guests remain the likeliest to travel as a couple (63.0%), VFRs the likeliest to travel solo (22.7%), and Day trippers the likeliest to visit with a group of friends (12.1%).

Figure 12: Travel Party Composition



Question: Which best describes your travel group on this trip? Are you...? (Select all that apply)
Base: All Respondents. 5,141 responses.

Detail by Type of Visitor

	Hotel	VFR	Day Trip
Couple	63.0%	49.7%	46.3%
Immediate Family	25.2%	30.2%	31.9%
Solo	7.4%	22.7%	14.0%
Group of Friends	7.0%	3.3%	12.1%
Group of Couples	1.8%	0.3%	2.3%
Extended Family	1.6%	1.1%	1.1%
Business Associates	1.2%	0.0%	0.3%
Tour Group	0.1%	0.0%	0.5%
Other	0.0%	0.1%	0.3%
Sample Size:	1,457	819	1,459

Travel Party Size

Similar to the past, the typical travel group consisted of 2.6 people in 2022 (vs. 2.5 in 2021). This included 1.3 adult females and 1.0 adult males. One-in-five visitors traveled with children under 18 (19.0%).

Figure 11: Travel Party Size

	Mean
Male adults (18 yrs. +)	1.0
Female adults (18 yrs. +)	1.3
Male children (0 to 17 yrs.)	0.2
Female children (0 to 17 yrs.)	0.2
Average Travel Party Size	2.6
Percent with children in party	19.0%

Question: How many people of each type are in your immediate travel party, including yourself?
Base: All Respondents. 5,088 responses.

Detail by Type of Visitor

	Hotel	VFR	Day Trip
Male adults (18 yrs. +)	1.0	0.9	0.9
Female adults (18 yrs. +)	1.2	1.1	1.3
Male children (0 to 17 yrs.)	0.2	0.1	0.2
Female children (0 to 17 yrs.)	0.1	0.2	0.2
Average Travel Party Size	2.5	2.3	2.6
Percent with Children in Party	16.8%	19.2	18.8
Sample Size:	1,442	817	1,446

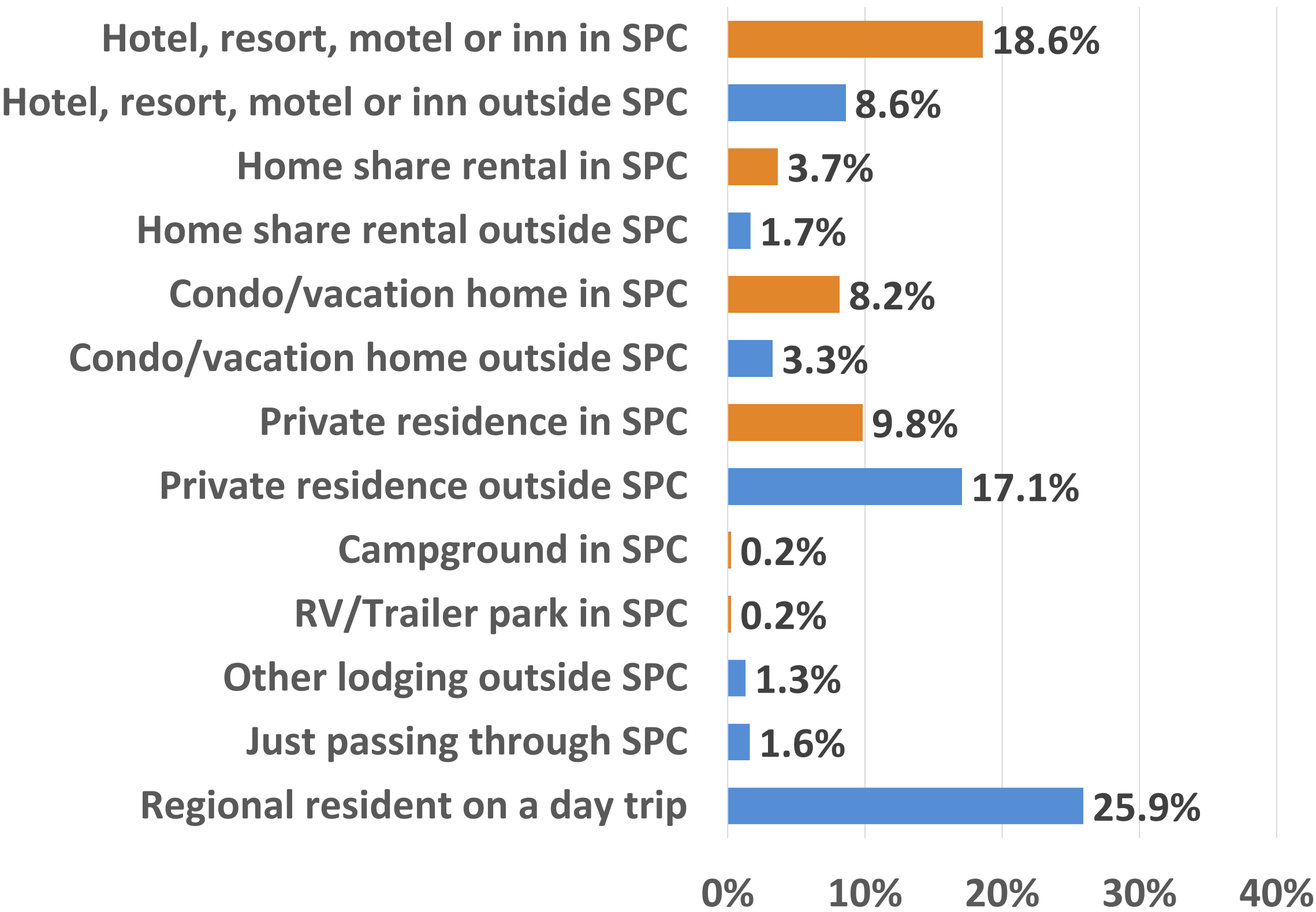
Lodging Type

Similar to last year, two-in-five visitors during 2022 stayed overnight in St. Pete/Clearwater (40.7% vs. 38.3 in 2021), with most opting for paid accommodations (30.5% vs. 32.5% in 2021). These St. Pete/Clearwater overnigheters chose various types of paid lodging: hotel (18.6%), home share rental (3.7%), or condo/vacation home (8.2%). Very few used an RV park/campground (0.4%). One-in-ten stayed with friends/family in a private residence (9.8%).

Day-trippers—including those staying in paid or private accommodations outside the St. Pete/Clearwater area and regional residents on leisure day trips—represents three-in-five visitors surveyed (59.5% vs. 61.7% in 2021).

Question: Where are you staying overnight on this trip to the St. Pete/Clearwater area? (Select one)
Base: All Respondents. 5,144 responses.

Figure 13: Type of Lodging

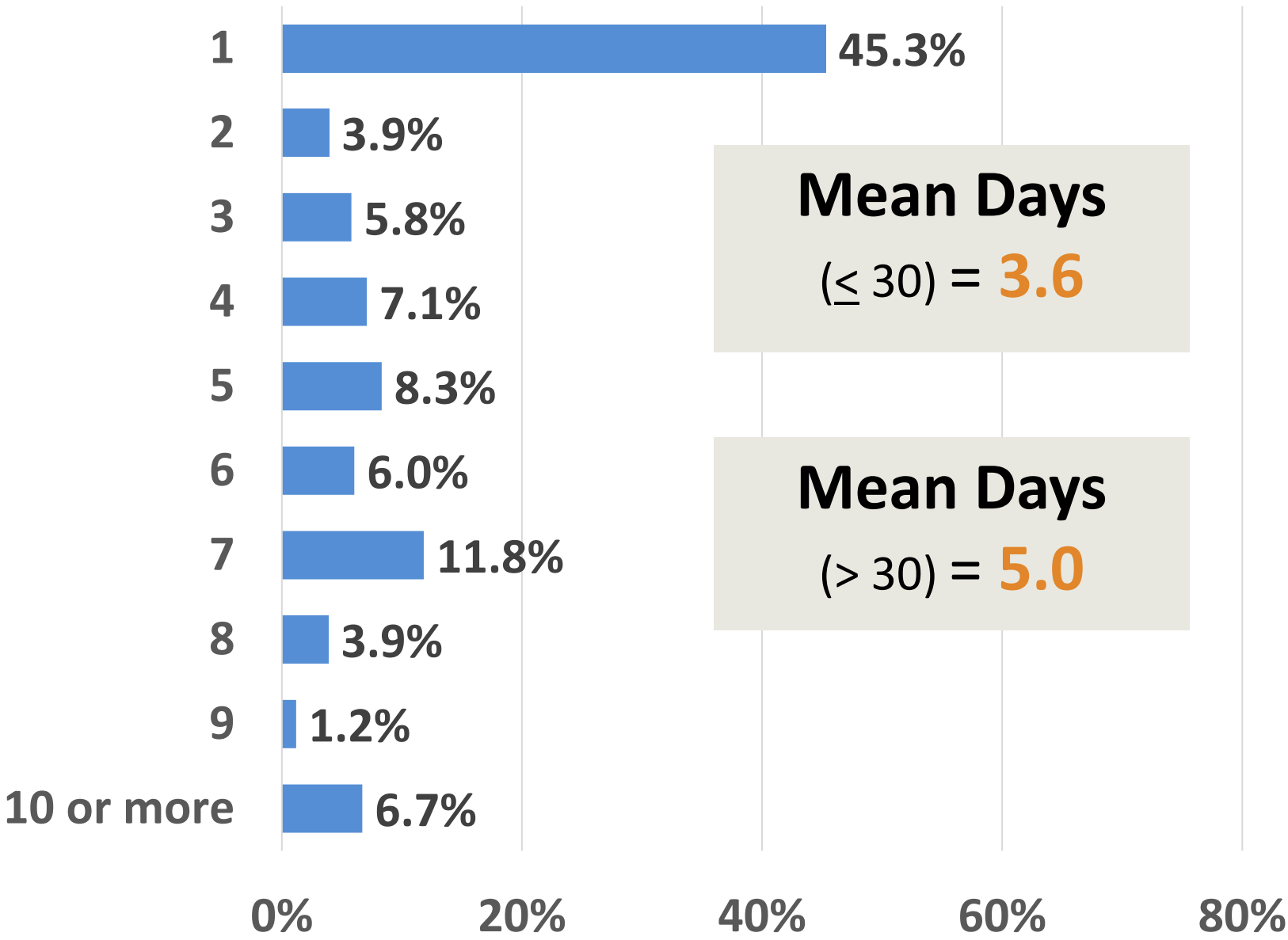


Note:
Orange = stayed in lodging located in St. Pete/Clearwater
Blue = did not stay or stayed outside St. Pete/Clearwater

Days in St. Pete/Clearwater

Overall, visitors in 2022 spent an average of 3.6 days in the area. VFRs, following the pattern of prior years, averaged longer stays in the area than Hotel Guests (5.6 days vs. 5.3).

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. 4,939 responses.

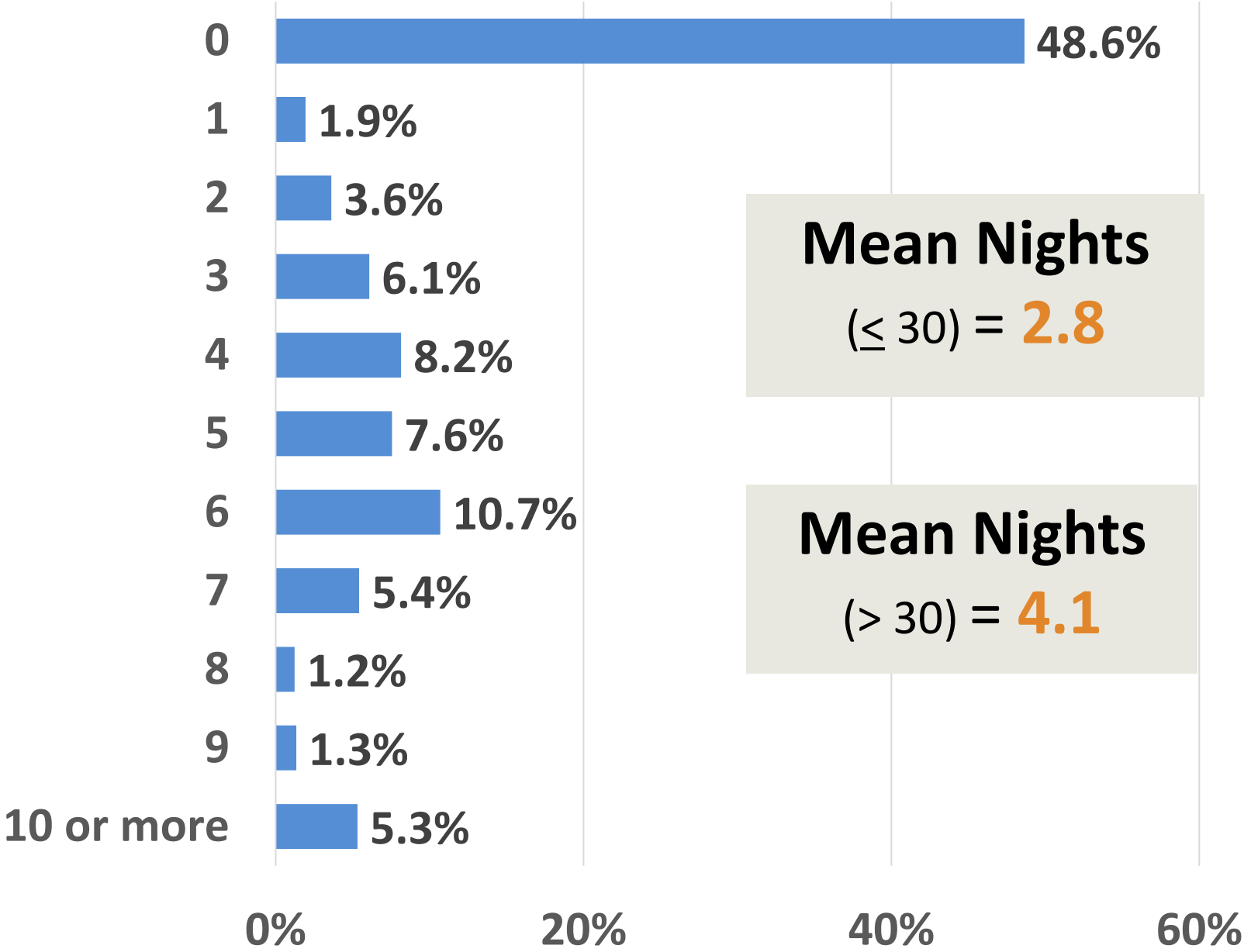
Detail by Type of Visitor

	Hotel	VFR	Day Trip
1	2.8%	0.8%	75.1%
2	4.8%	2.7%	4.5%
3	12.2%	8.5%	3.8%
4	18.2%	16.1%	2.6%
5	21.7%	19.6%	2.0%
6	11.1%	12.1%	1.7%
7	18.5%	21.2%	3.3%
8	4.2%	3.8%	2.6%
9	1.1%	0.6%	1.2%
10 or more	5.4%	14.7%	3.2%
Mean Days (<30)	5.3	5.9	--
Mean Days (>30)	5.6	10.4	--
Sample Size:	1,452	737	1,442

Nights in St. Pete/Clearwater

St. Pete/Clearwater visitors spent an average of 2.8 nights in the area (up from to 2.3 in 2021). Plus, more than one-in-ten stayed for a week or more (13.2%). As noted for average number of days, VFR visitors stayed longer (5.4 nights) than Hotel Guests (4.6 nights).

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. 4,957 responses.

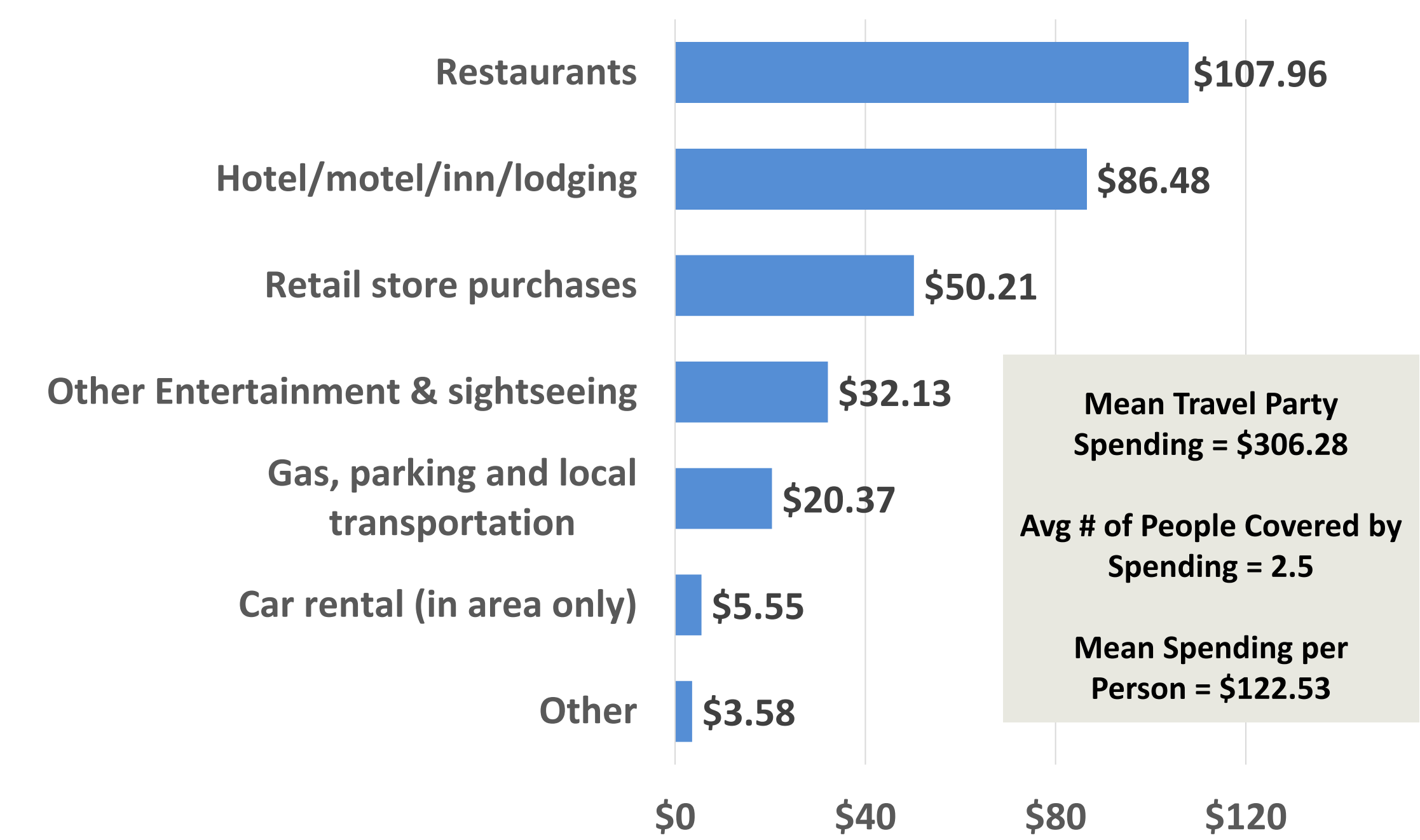
Detail by Type of Visitor

	Hotel	VFR
0	1.3%	1.3%
1	5.3%	2.0%
2	11.1%	4.4%
3	16.6%	12.9%
4	21.4%	18.7%
5	14.8%	18.3%
6	17.2%	19.0%
7	5.7%	8.3%
8	1.4%	0.5%
9	1.4%	2.5%
10 or more	3.8%	12.0%
Mean Nights (<30)	4.6	5.4
Mean Nights (>30)	4.8	9.6
Sample Size:	1,452	746

Daily Spending In-Market

The average St. Pete/Clearwater area travel party spent \$306.28 daily, an increase of \$36.11 from a year ago (\$270.17). This represents an estimated average of \$122.53 per person for in-market spending (from \$112.68 in 2021) and covers 2.5 travelers in the travel party (similar to 2.4 in 2021). Hotel Guests continue to demonstrate the highest daily in-market spending, by far, averaging \$492 per travel party (up from \$469 in 2021), with the largest portion attributed to lodging (\$251).

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. 4,941 responses.

Detail by Type of Visitor

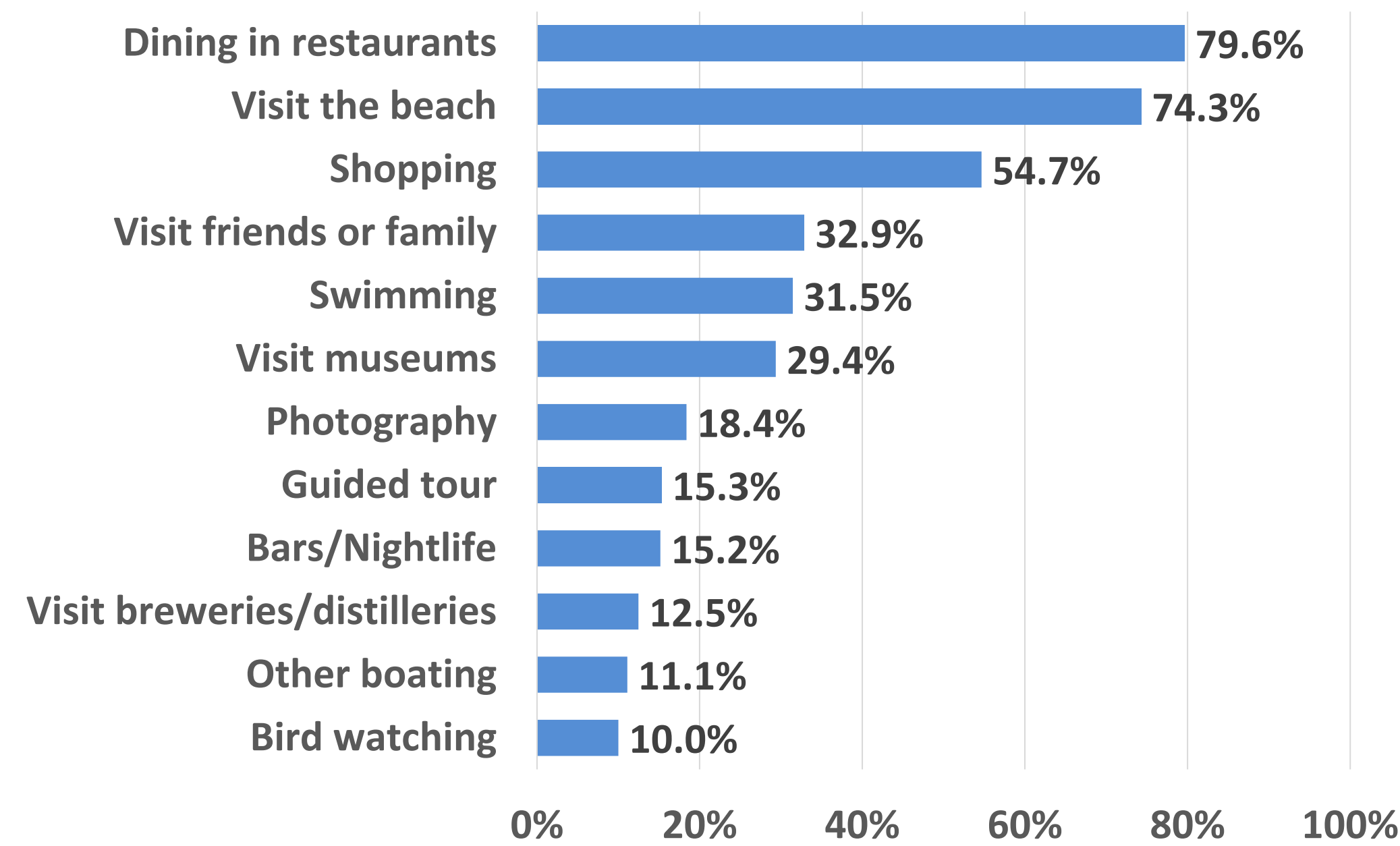
	Hotel	VFR	Day Trip
Restaurants	\$132.45	\$86.70	\$94.19
Hotel/motel/inn/lodging	\$250.80	\$12.93	\$20.06
Retail store purchases	\$45.63	\$48.74	\$54.59
Other Entertainment & sightseeing	\$26.52	\$28.64	\$36.21
Gas, parking and local transportation	\$22.03	\$16.61	\$21.48
Car rental (in area only)	\$11.27	\$2.24	\$3.81
Other	\$3.48	\$8.28	\$1.67
Mean Spending per Travel Party	\$492.12	\$204.14	\$232.03
# of People Covered by Spending	2.35	2.19	2.54
Mean Spending per Person	\$209.77	\$93.12	\$91.31
Sample Size:	1,429	777	1,363

Trip Activities

In line with top trip activities mentioned in the past, St. Pete/Clearwater visitors most commonly dined in restaurants (79.6%), visited the beach (74.3%) and shopped (54.7%). In addition to these, a third of visitors also included visiting friends/family (32.9%), swimming (31.5%), and visiting museums (29.4%) in the top half-dozen list of activities while in the area. The chart and table below outline the leading 12 activities selected (of 25 total listed options, at least one-in-ten engaged in these).

Full detail on all trip activities 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. 5,133 responses.

Detail by Type of Visitor

	Hotel	VFR	Day Trip
Dining in restaurants	82.3%	91.2%	74.3%
Visit the beach	87.6%	86.3%	64.1%
Shopping	60.4%	72.5%	45.4%
Visit friends or family	18.8%	70.2%	33.8%
Swimming	44.5%	41.5%	19.7%
Visit museums	28.3%	37.3%	29.6%
Photography	23.3%	31.6%	15.7%
Guided tour	22.0%	18.6%	9.4%
Bars/Nightlife	20.4%	33.0%	11.2%
Visit breweries/distilleries	9.5%	29.9%	11.9%
Other boating	17.8%	17.1%	7.0%
Bird watching	10.6%	23.5%	8.2%
Sample Size:	1,456	816	1,456

Trip Activities – Full Detail

	Total	Hotel	VFR	Day Trip
Dining in restaurants	79.6%	82.3%	91.2%	74.3%
Visit the beach	74.3%	87.6%	86.3%	64.1%
Shopping	54.7%	60.4%	72.5%	45.4%
Visit friends or family	32.9%	18.8%	70.2%	33.8%
Swimming	31.5%	44.5%	41.5%	19.7%
Visit museums	29.4%	28.3%	37.3%	29.6%
Photography	18.4%	23.3%	31.6%	15.7%
Guided tour	15.3%	22.0%	18.6%	9.4%
Bars/Nightlife	15.2%	20.4%	33.0%	11.2%
Visit breweries and/or distilleries	12.5%	9.5%	29.9%	11.9%
Other boating	11.1%	17.8%	17.1%	7.0%
Bird watching	10.0%	10.6%	23.5%	8.2%
Fishing	6.8%	7.5%	11.0%	5.1%
Attend a festival or special event	6.0%	5.5%	7.3%	6.2%
Jet skiing	3.6%	5.8%	3.4%	2.2%
Shelling	3.5%	6.2%	2.7%	2.3%
Take a dining cruise	2.7%	5.8%	1.2%	1.6%
Biking	2.3%	3.1%	4.0%	1.5%
Golf	1.8%	2.6%	2.1%	1.0%
Kayaking/Canoeing	1.5%	3.6%	2.3%	0.4%
Attend or participate in a sporting event	1.4%	1.5%	1.5%	1.5%
Parasailing	1.2%	2.3%	0.4%	0.7%
Sailing	0.9%	1.5%	1.1%	0.7%
Paddle boarding	0.8%	0.8%	2.1%	0.7%
Baseball Spring Training	0.5%	0.4%	0.5%	0.4%
Sample Size:	5,133	1,456	816	1,456

Interesting differences to note amongst visitor types:

- **VFRs** noted much greater interest in dining, shopping, visiting friends/family (as would be expected), museums, bars/nightlife, breweries/distilleries, and bird watching than Hotel Guests.
- Slightly more **Hotel Guests** than VFRs selected swimming and guided tours.
- **Day trippers** usually trail Hotel Guests and VFRs in participation in each activity (in part, because they have less time to pursue their interests). However, they keep up with Hotel Guests on visiting museums and breweries/distilleries and exceed them for visiting friends/family.

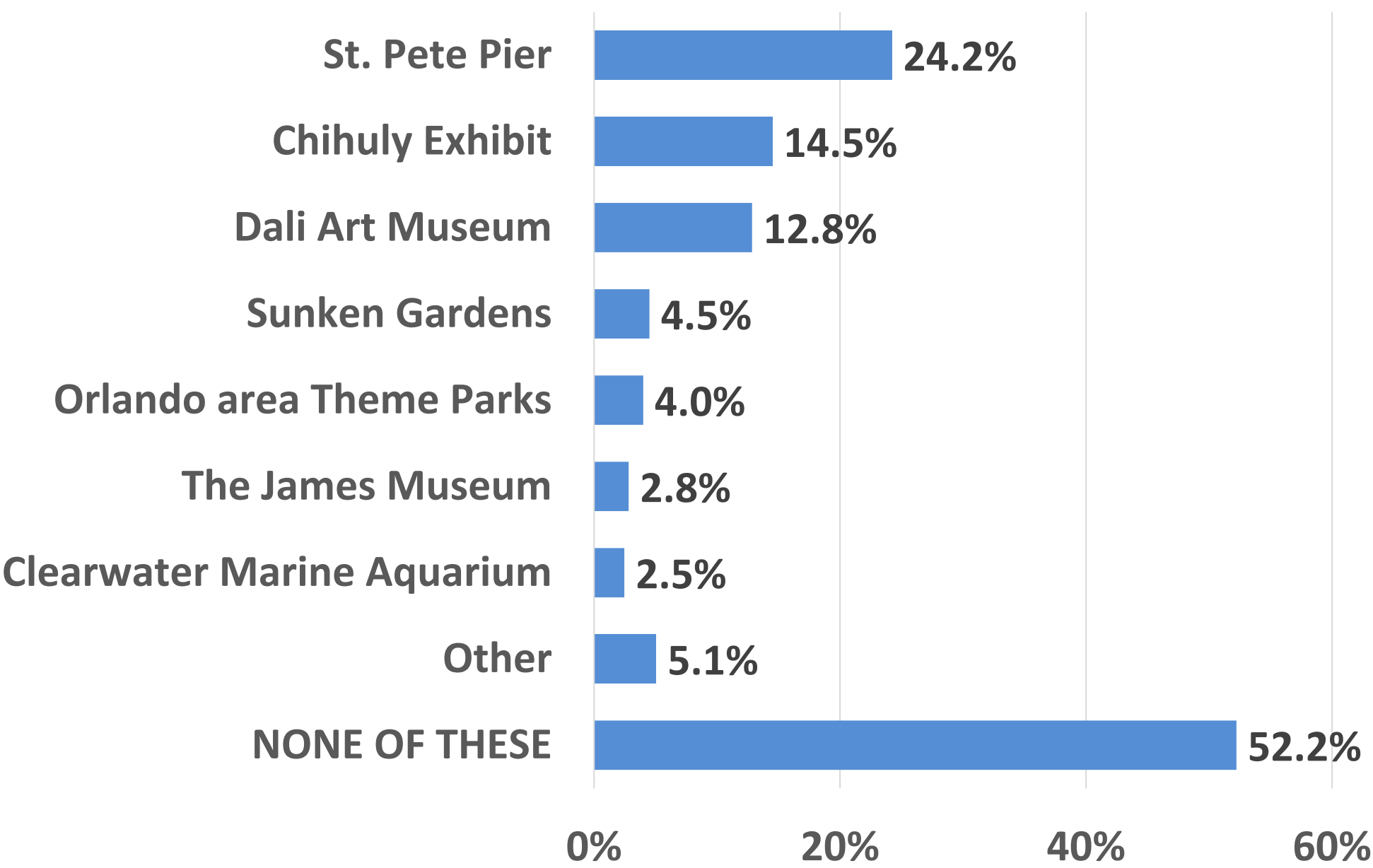
Question: Which of these activities did you, or will you, participate in while in the St. Pete/Clearwater area? (Select all that apply)

Base: All Respondents. 5,133 responses.

Attractions Visited

While in the St. Pete/Clearwater area, visitors continued to most often choose to visit the St. Pete Pier (24.2%), Chihuly Exhibit (14.5%), and/or the Dali Art Museum (12.8%). A much larger share of VFRs visited the St. Pete Pier (44.5%, roughly doubling the level of both hotel guests and day-trippers). More of them (VFRs) also visited the Chihuly Exhibit (18.3%), the Dali Art Museum (17.6%), the Sunken Gardens (9.3%), and the James Museum (7.5%) than travelers within other segments.

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. 5,102 responses.

Detail by Type of Visitor

	Hotel	VFR	Day Trip
St. Pete Pier	23.7%	44.5%	21.5%
Chihuly Exhibit	14.7%	18.3%	14.7%
Dali Art Museum	15.2%	17.6%	11.6%
Sunken Gardens	3.4%	9.3%	3.9%
Orlando area Theme Parks	3.7%	1.3%	4.8%
The James Museum	3.6%	7.5%	2.0%
Clearwater Marine Aquarium	5.3%	3.2%	1.0%
Other	6.9%	6.6%	4.7%
NONE OF THESE	53.5%	37.6%	52.7%
Sample Size:	1,440	814	1,449

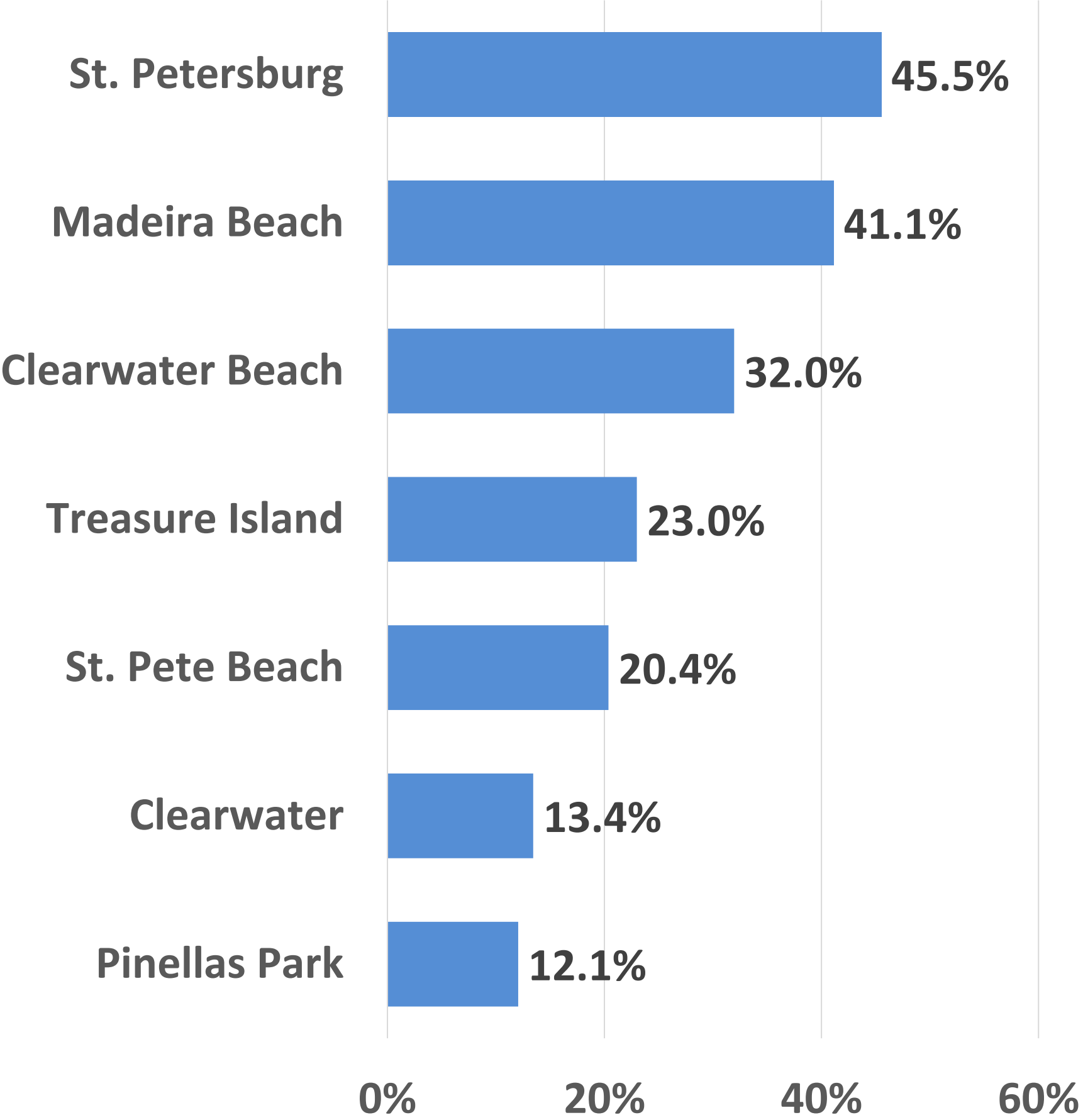
Communities Visited

Of the 19 communities tested, St. Petersburg (45.5%), Madeira Beach (41.1%), and Clearwater Beach (32.0%) continued to rank as the most popular amongst Pinellas County visitors. Additional communities that drew notable numbers of visitors included Treasure Island (23.0%, up from 14.3% in 2021) and St. Pete Beach (20.4%).

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. 5,139 responses.

Figure 19: Communities Visited



Communities Visited—Full Detail

	Total	Hotel	VFR	Day Trip
St. Petersburg	45.5%	37.0%	67.3%	44.6%
Madeira Beach	41.1%	40.5%	58.6%	31.6%
Clearwater Beach	32.0%	43.1%	38.5%	24.8%
Treasure Island	23.0%	26.6%	35.9%	14.7%
St. Pete Beach	20.4%	29.8%	34.3%	11.0%
Clearwater	13.4%	12.9%	29.3%	11.6%
Pinellas Park	12.1%	10.4%	29.0%	11.1%
Indian Shores & Indian Rocks Beach	8.4%	6.3%	17.6%	2.0%
Seminole	7.8%	6.9%	22.4%	5.3%
North Redington Beach/Redington Shores	5.6%	5.9%	9.7%	1.1%
Dunedin	5.3%	3.5%	15.3%	3.2%
Gulfport	4.9%	4.8%	14.2%	3.2%
Largo	4.2%	2.8%	16.4%	2.1%
Tarpon Springs	4.1%	2.4%	10.3%	2.2%
Pass-A-Grille Beach	3.5%	5.0%	4.8%	1.9%
Safety Harbor	2.2%	2.1%	7.6%	1.2%
Palm Harbor	1.6%	1.3%	3.5%	1.2%
Tierra Verde	1.1%	1.2%	1.3%	0.6%
Oldsmar	0.4%	0.2%	1.4%	0.3%
Sample Size:	5,139	1,457	817	1,459

Interesting differences seen amongst visitor types:

- Consistent with longer stays and local advice from their resident friends/family, a larger proportion of **VFRs** visited nearly every community than either Hotel Guests or day trippers. The one leading exception is Clearwater Beach.
- More **Hotel Guests** visited Clearwater Beach than any other segment (43.1%), but were the least likely to stop in St. Petersburg (37.0%).
- St. Petersburg continues to be the most popular Pinellas County community for day trippers, by far. However, except for St. Petersburg and Pinellas Park, where they outpaced Hotel Guests, **day trippers** lagged both VFRs and Hotel Guests in visiting every community.

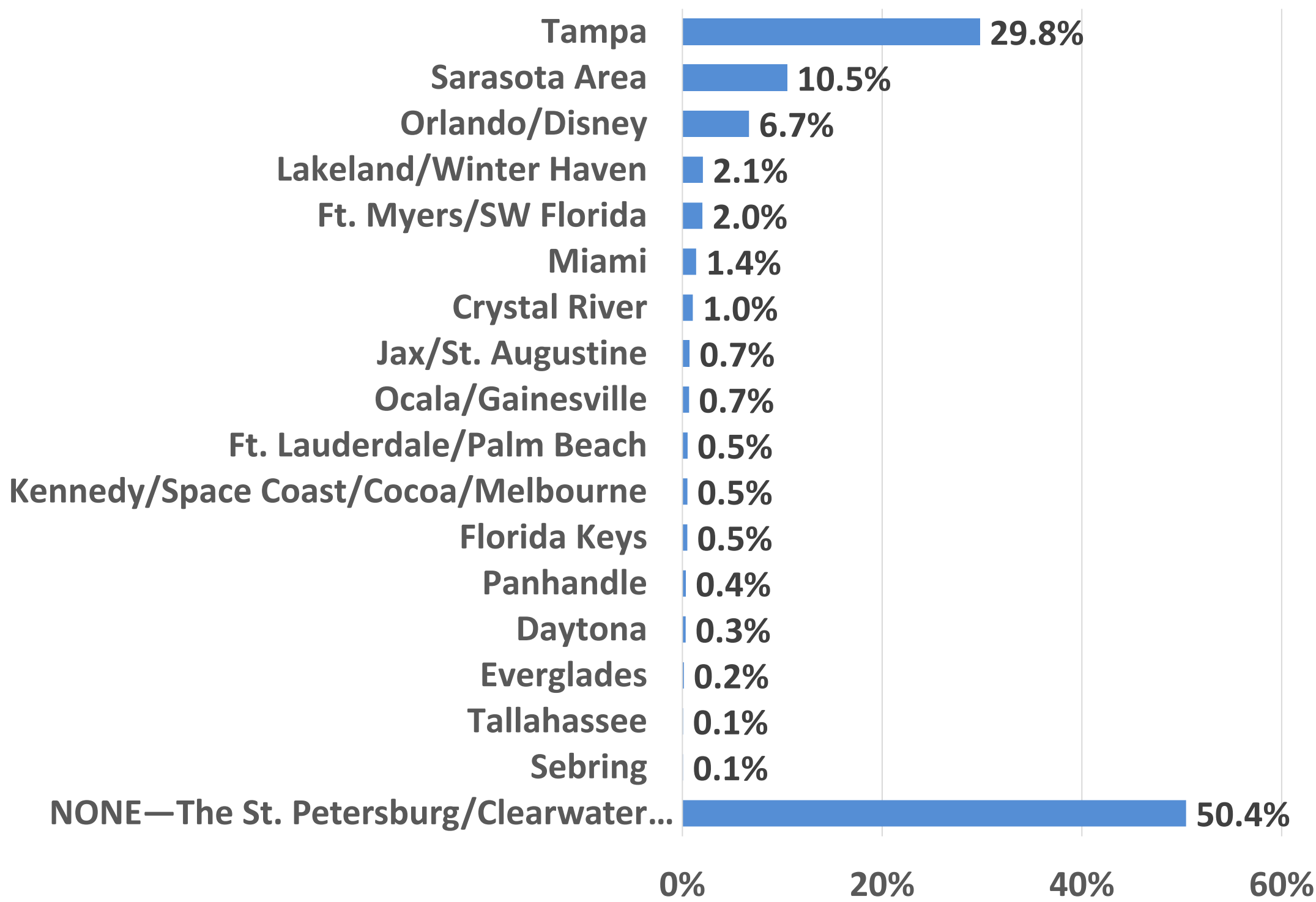
Question: Which of the following communities in the St. Pete/Clearwater area did you visit? (Show list. Select all that apply)

Base: All Respondents. 5,139 responses.

Other Destinations Visited

As part of their trip to Pinellas County, half of visitors made trips to other regional destinations (49.6%). However, more visitors appear to be coming specifically, and solely, to visit St. Pete/Clearwater (50.4% in 2022, up from 45.4% in 2021 and 41.8% in 2020). Visitors selected, among 17 listed areas, those that they had visited or planned to visit as part of their current trip. Of those selections, Tampa remains the decisive leader (29.8%), followed by the Sarasota area (10.5%), and/or Orlando/Disney (6.7%).

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. 5,097 responses.

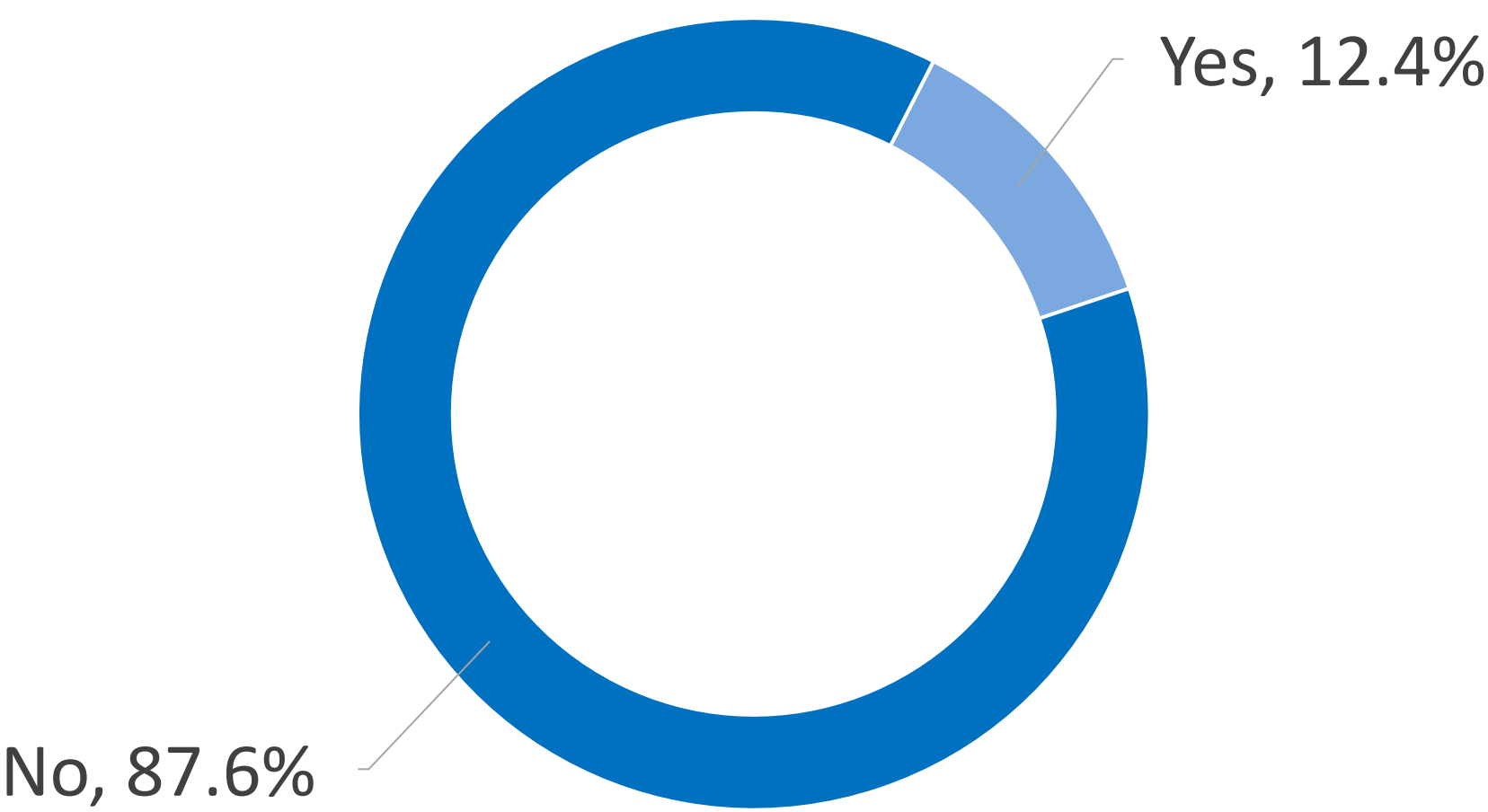
Detail by Type of Visitor

	Hotel	VFR	Day Trip
Tampa	18.7%	33.2%	31.1%
Sarasota Area	4.7%	5.6%	13.1%
Orlando/Disney	6.1%	3.6%	7.6%
Lakeland/Winter Haven	1.0%	1.3%	2.7%
Ft. Myers/SW Florida	2.8%	1.9%	1.7%
Miami	1.8%	1.1%	1.5%
Crystal River	0.8%	1.2%	1.2%
Jax/St. Augustine	1.0%	0.8%	0.7%
Ocala/Gainesville	0.5%	0.4%	0.8%
Ft. Lauderdale/Palm Beach	0.3%	0.7%	0.6%
Kennedy/Space Coast/Cocoa/Melbourne	0.8%	0.2%	0.3%
Florida Keys	0.4%	0.7%	0.3%
Panhandle	0.7%	0.3%	0.2%
Daytona	0.2%	0.2%	0.4%
Everglades	0.1%	0.0%	0.2%
Tallahassee	0.0%	0.0%	0.1%
Sebring	0.1%	0.0%	0.0%
NONE—The St. Petersburg/Clearwater area was my only destination on this trip	63.8%	56.6%	45.8%
Sample Size:	1,441	815	1,446

First-Time Visit to Florida

While most visitors have been to Florida before the current 2022 trip (87.6%), the share of first-timers is increasing (12.4% in 2022 vs. 4.5% in 2021 and 2.9% in 2020). Hotel Guests (15.5%) and Day trippers (13.4%) are more likely first time visitors than VFRs (6.2%).

Figure 21: First-Time Visitors to Florida



Question: Is this your first visit to Florida? Base: All Respondents. 5,014 responses.

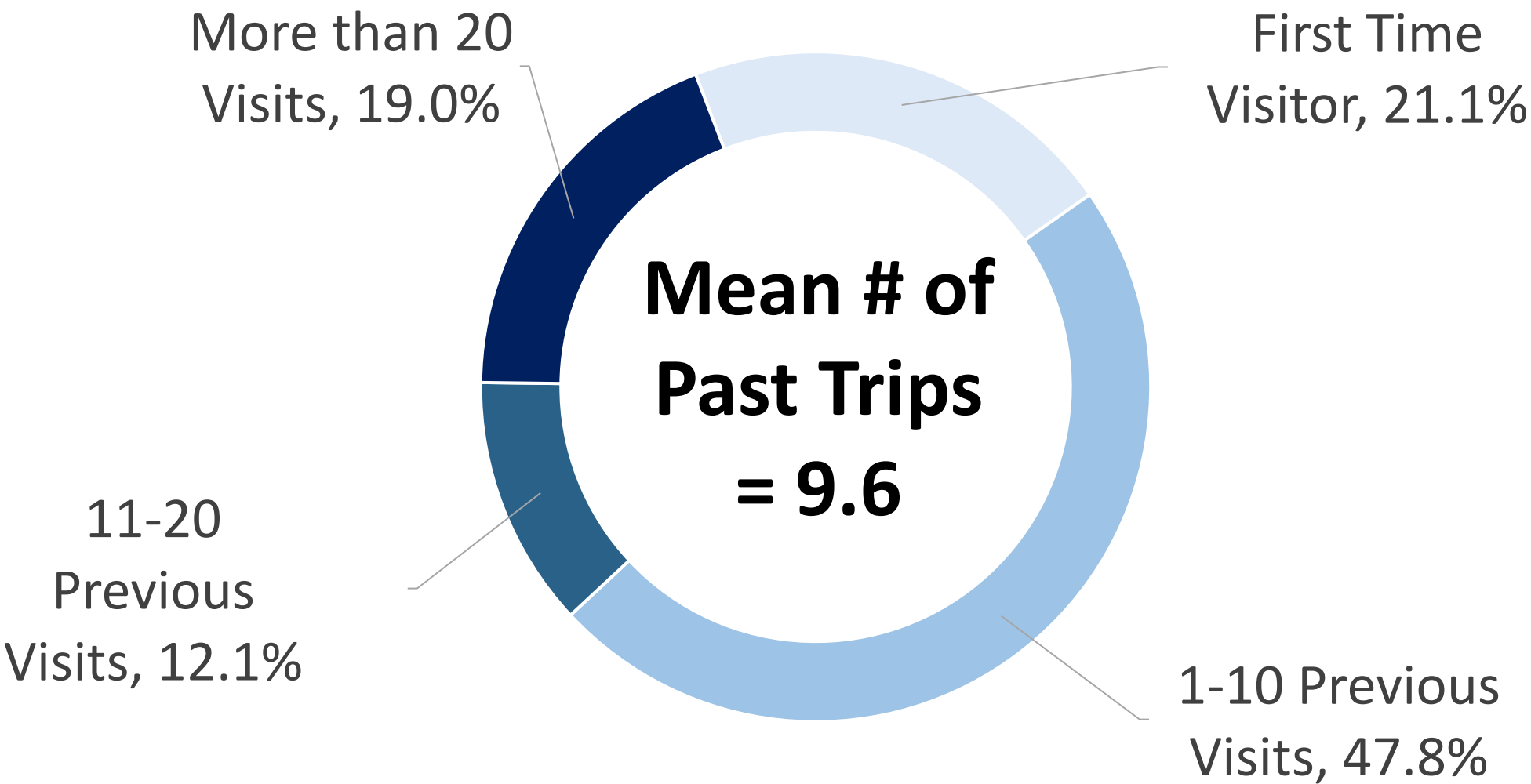
Detail by Type of Visitor

	Hotel	VFR	Day Trip
Yes	15.5%	6.2%	13.4%
No	84.5%	93.8%	86.6%
Sample Size:	1,439	800	1,389

Previous Visitation to St. Pete/Clearwater

One-in-five visitors were in the St. Pete/Clearwater area for the first time, similar to two years ago (21.1% in 2022, 25.1% in 2021, 21.5% in 2022). The average St. Pete/Clearwater area visitor during 2022 had made 9.6 previous trips to the area, very similar to prior years (9.3 in 2021; 9.1 in 2020). Hotel Guests remain the likeliest segment to be first-time visitors (29.6%) with half as many prior visits (5.6) as VFRs (11.3) or Day trippers (11.5). VFRs are least likely to be novice visitors (13.6%).

Figure 22: 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. 4,615 responses.

Detail by Type of Visitor

	Hotel	VFR	Day Trip
First-time Visitors	29.6%	13.6%	20.7%
1-10 Previous Visits	53.7%	49.3%	40.6%
11-20 Previous Visits	10.2%	13.2%	13.5%
More than 20 Previous Visits	6.5%	23.9%	25.2%
Mean	5.6	11.3	11.5
Sample Size:	1,367	787	1,141

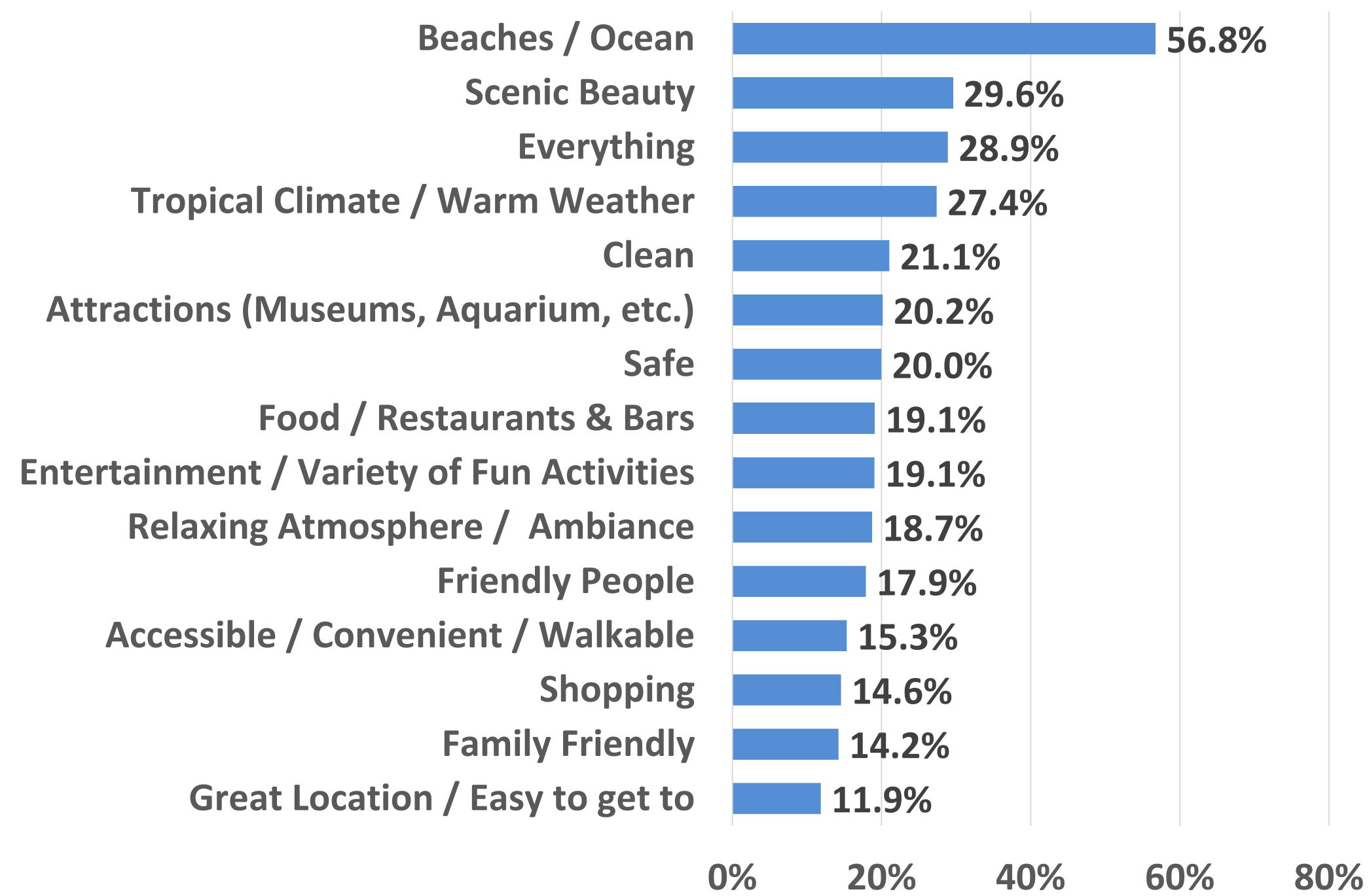
A family of four is captured in a joyful moment, running along a beach at sunset. The father, on the left, leads the group, followed by a young girl, a young boy, and the mother on the right. They are all holding hands and running towards the ocean. The sun is low on the horizon, creating a warm, golden glow that reflects on the wet sand and the gentle waves. The sky is a mix of soft pinks, oranges, and blues. The overall mood is one of happiness and togetherness.

Visitor Satisfaction

Most Liked Aspect

By a wide margin, beaches remain the most top-of-mind liked aspect of the St. Pete/Clearwater area (56.8%). Three aspects vie for the second-place spot: scenic beauty (29.6%), “everything” (28.9%), and climate/weather (27.4%).

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



Question: What do you like most about the St. Pete/Clearwater area?
Base: All Respondents. 5,136 responses.

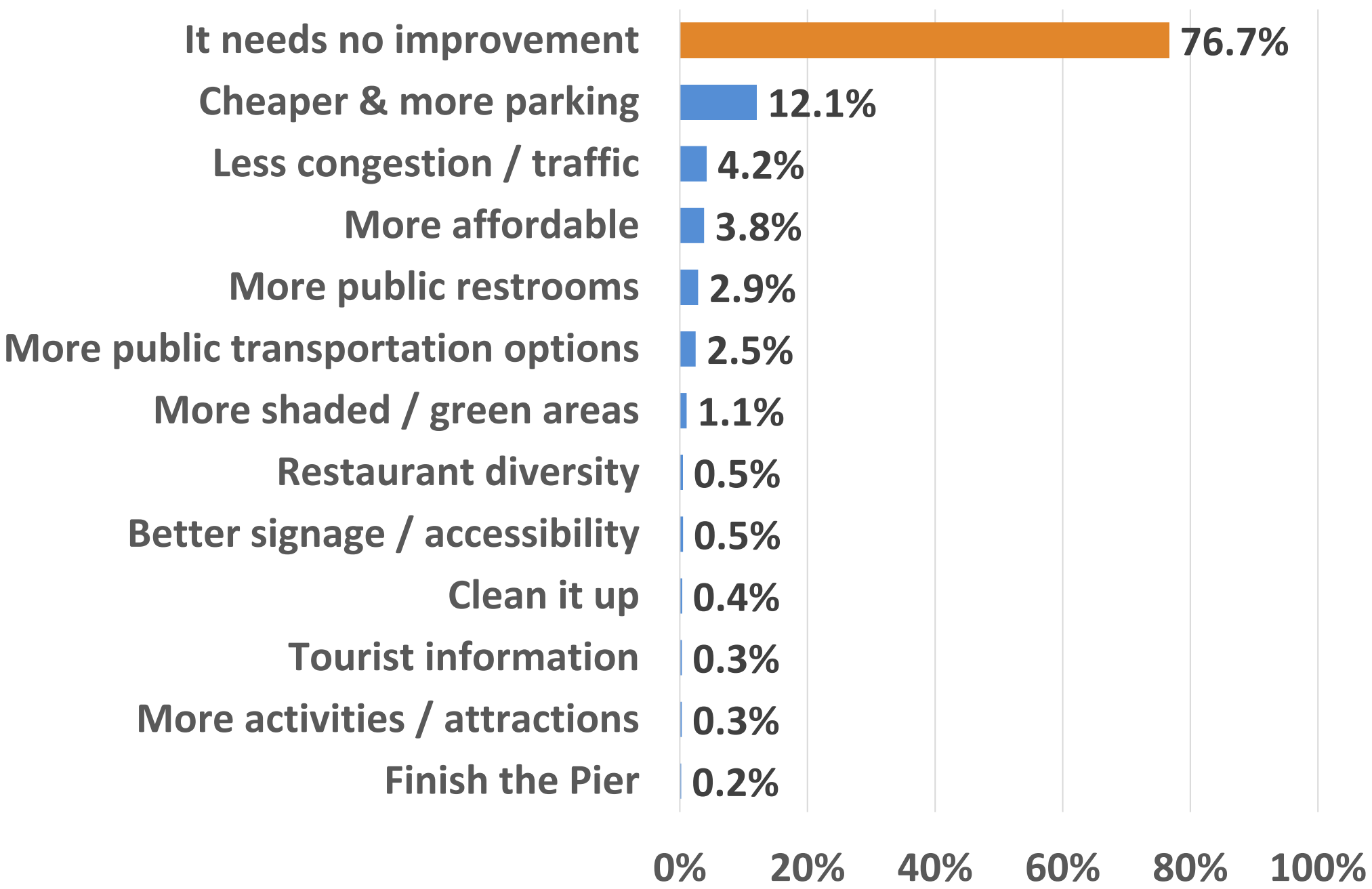
Detail by Type of Visitor

	Hotel	VFR	Day Trip
Beaches / Ocean	63.5%	57.1%	56.5%
Scenic Beauty	30.1%	39.0%	29.1%
Everything	26.4%	51.6%	23.1%
Tropical Climate / Warm Weather	32.8%	40.0%	23.6%
Clean	20.0%	30.4%	22.1%
Attractions (Museums, Aquarium, etc.)	16.0%	30.5%	21.9%
Safe	16.7%	29.3%	21.9%
Food / Restaurants & Bars	16.7%	31.2%	19.6%
Entertainment / Variety of Fun Activities	15.6%	31.2%	19.8%
Relaxing Atmosphere / Ambiance	17.5%	33.3%	18.1%
Friendly People	17.4%	32.4%	17.7%
Accessible / Convenient / Walkable	17.1%	29.4%	14.2%
Shopping	12.3%	28.8%	14.3%
Family Friendly	12.4%	29.0%	14.2%
Great Location / Easy to get to	11.8%	26.6%	10.4%
Sample Size:	1,458	818	1,455

Attractions or Services that Would Enhance the Destination Experience

The majority of visitors generally agree that the St. Pete/Clearwater area “needs no improvement” (76.7%). Of the specific suggestions provided, cheaper/more parking continues to lead suggestions, cited by one-in-eight visitors (12.1%) and particularly more often mentioned by day trippers (15.4%).

Figure 24: 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. 5,096 responses.

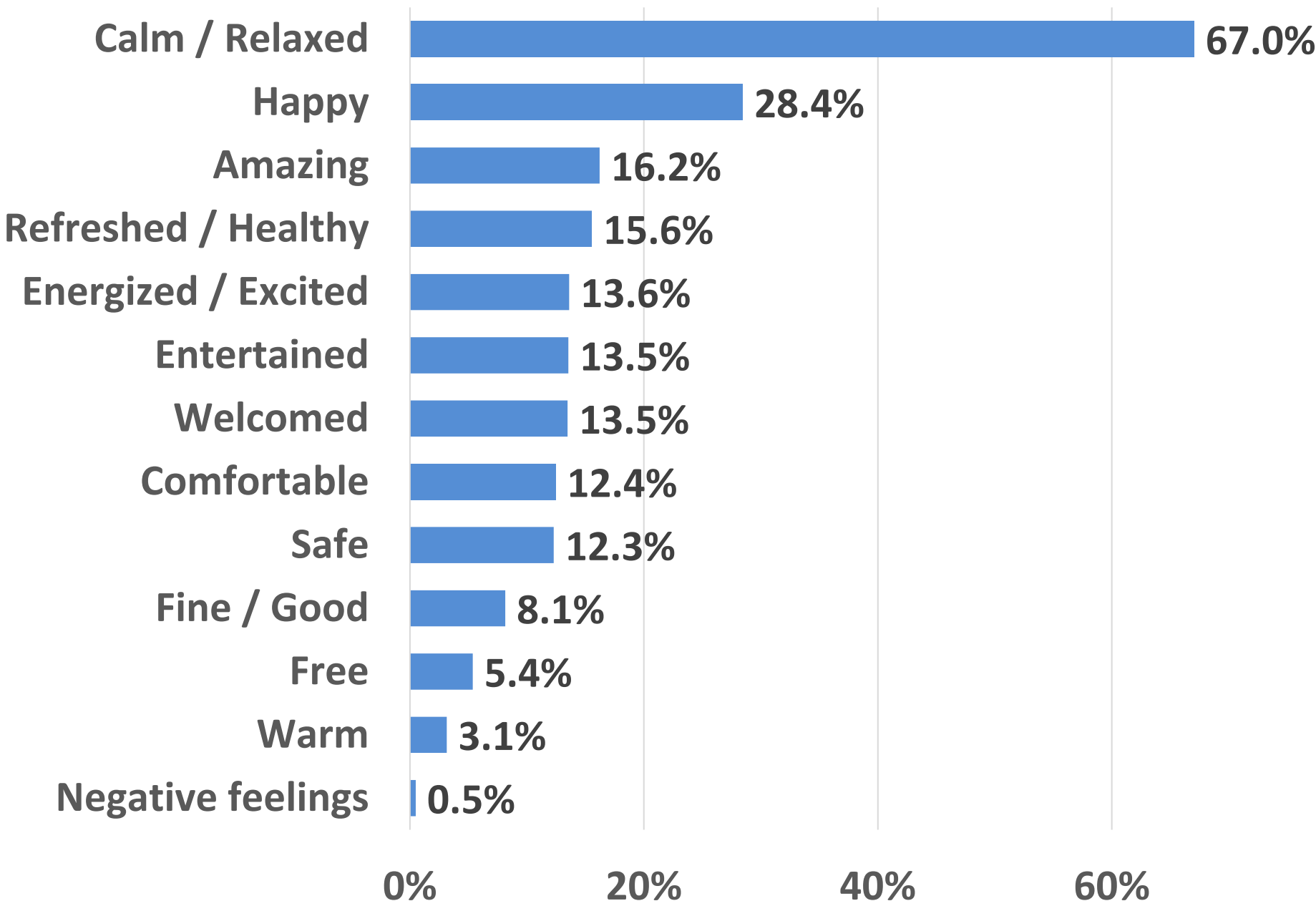
Detail by Type of Visitor

	Hotel	VFR	Day Trip
It needs no improvement	79.2%	88.1%	73.0%
Cheaper & more parking	6.8%	5.4%	15.4%
Less congestion / traffic	3.0%	3.6%	4.8%
More affordable	4.4%	1.7%	4.1%
More public restrooms	2.1%	1.9%	3.5%
More public transportation options	3.6%	1.2%	2.4%
More shaded / green areas	1.0%	0.9%	1.2%
Restaurant diversity	1.1%	0.1%	0.4%
Better signage / accessibility	0.6%	0.0%	0.5%
Clean it up	0.8%	0.4%	0.2%
Tourist information	0.7%	0.2%	0.2%
More activities / attractions	0.0%	0.2%	0.4%
Finish the Pier	0.2%	0.0%	0.2%
Sample Size:	1,447	809	1,451

Feelings in St. Pete/Clearwater

St. Pete/Clearwater area visitors feel calm (67.0%) and happy (28.4%) while they’re in the destination, the same top two words given in 2021. In an open-ended format, visitors wrote the one word or phrase that best describes how they feel in the area. Secondarily to calm/relaxed and happy, they add several other strong, positive emotions/adjectives: amazing (16.2%), refreshed/healthy (15.6%), energized/excited (13.6%), entertained (13.5%), welcomed (13.5%), comfortable (12.4%), and safe (17.3%).

Figure 25: 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. 5,109 responses.

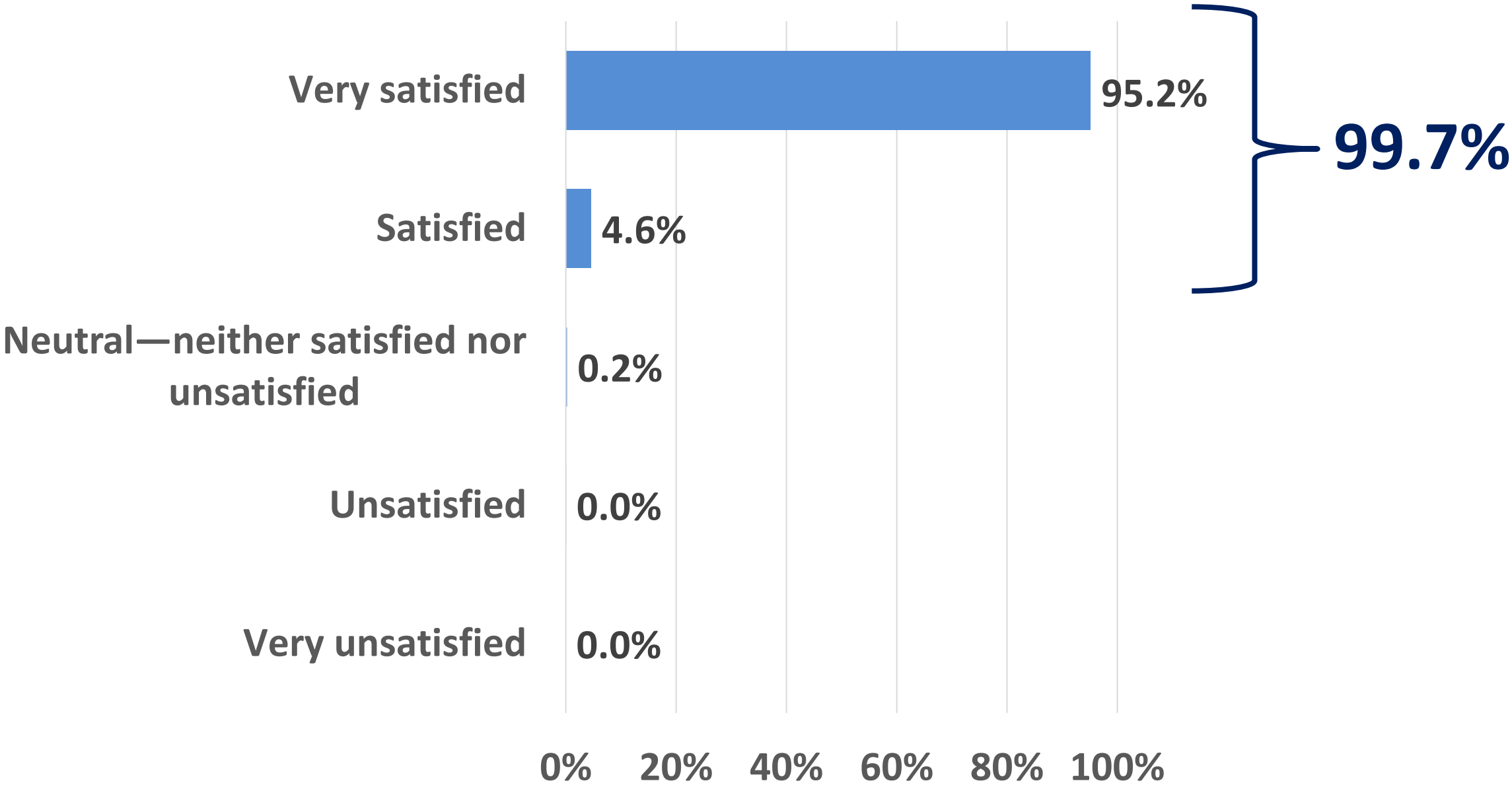
Detail by Type of Visitor

	Hotel	VFR	Day Trip
Calm / Relaxed	73.2%	63.1%	63.8%
Happy	21.0%	45.8%	30.0%
Amazing	15.8%	31.1%	15.6%
Refreshed / Healthy	14.1%	29.5%	15.7%
Energized / Excited	12.4%	28.1%	13.3%
Entertained	11.4%	28.1%	13.6%
Welcomed	11.3%	28.4%	13.3%
Comfortable	10.2%	27.5%	12.3%
Safe	9.4%	27.3%	12.4%
Fine / Good	6.9%	12.0%	9.1%
Free	5.4%	15.5%	4.4%
Warm	3.2%	5.3%	3.0%
Negative feelings	0.6%	0.0%	0.7%
Sample Size:	1,447	815	1,447

Overall Satisfaction

The St. Pete/Clearwater area improves satisfaction on an already high bar, with nearly all visitors reporting being “very satisfied” with their experience in 2022 (95.2%, even exceeding 2021’s 93.7%). Virtually all visitors were “satisfied” or “very satisfied” (99.7%).

Figure 26: Overall Satisfaction



Question: How satisfied are you with your experience in the St. Pete/Clearwater area on this trip?
(Select one) Base: All Respondents. 5,104 responses.

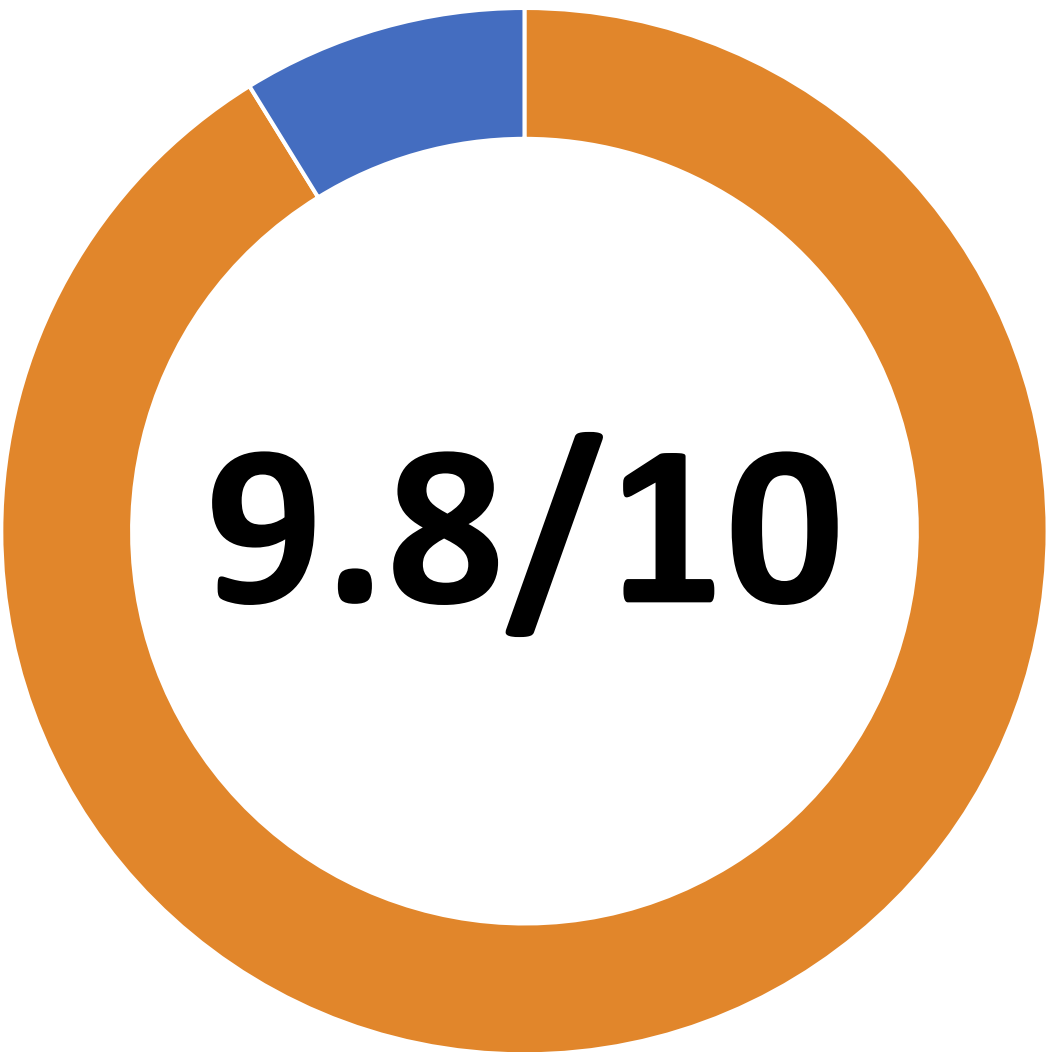
Detail by Type of Visitor

	Hotel	VFR	Day Trip
Top-2 Box	99.5%	100.0%	99.7%
Very satisfied	95.0%	97.2%	94.5%
Satisfied	4.5%	2.8%	5.2%
Neutral—neither satisfied nor unsatisfied	0.4%	0.0%	0.2%
Unsatisfied	0.1%	0.0%	0.0%
Very unsatisfied	0.0%	0.0%	0.0%
Sample Size:	1,451	817	1,439

Likelihood to Recommend

Consistent with the high level of satisfaction, visitors also reported that they are very likely to recommend the St. Pete/Clearwater area as a travel destination to others. Garnering a near-perfect score, the average visitor rated their likelihood to recommend the destination a 9.8 out of 10, matching last year’s exceptional level and led by VFRs (9.9).

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



Question: How likely are you to recommend the St. Pete/Clearwater area as a place to visit to other travelers? Please use a 10-point scale where 1 represents “Definitely will NOT recommend” and 10 represents “Certain to recommend.” Base: All Respondents. 5,114 responses.

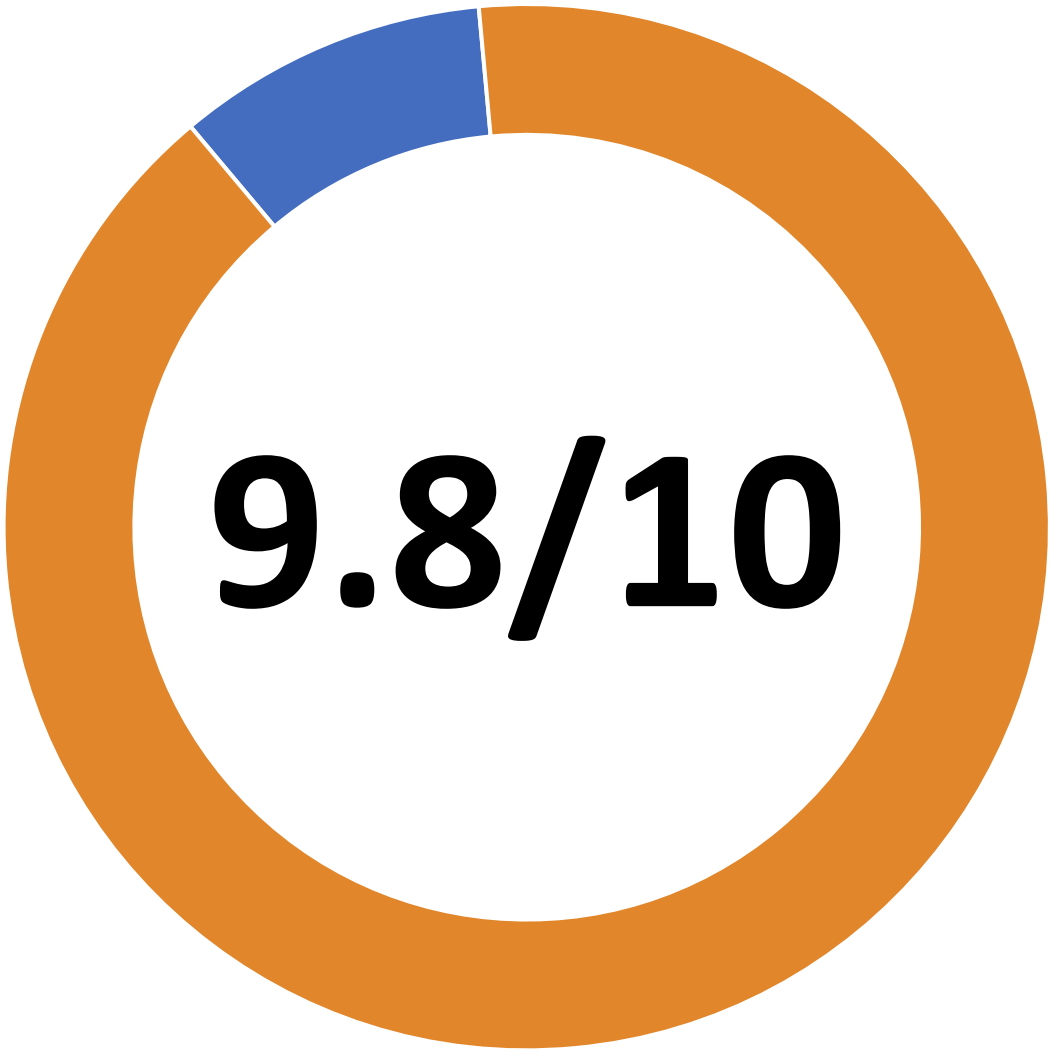
Detail by Type of Visitor

	Hotel	VFR	Day Trip
10--Certain to Recommend	85.6%	93.8%	89.6%
9	8.9%	3.7%	5.6%
8	4.0%	2.2%	4.1%
7	1.0%	0.1%	0.6%
6	0.1%	0.1%	0.1%
5	0.2%	0.0%	0.1%
4	0.1%	0.0%	0.0%
3	0.1%	0.0%	0.0%
2	0.0%	0.0%	0.0%
1--Definitely WILL NOT Recommend	0.0%	0.0%	0.0%
Mean Score	9.8	9.9	9.8
Sample Size:	1,451	815	1,445

Likelihood to Return

Further confirming the stellar satisfaction with St. Pete/Clearwater, visitors say that they are highly likely to return to the destination in the future. The average visitor rated their likelihood to return to the area a 9.8 out of 10, led again by VFRs (9.9 rating).


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



Question: How likely are you to return to the St. Pete/Clearwater area? Please use a 10-point scale where 1 represents “Definitely will NOT return” and 10 represents “Certain to return.”
Base: All Respondents. 5,069 responses.

Detail by Type of Visitor

	Hotel	VFR	Day Trip
10 – Certain to return	84.5%	95.6%	87.6%
9	8.2%	2.1%	6.5%
8	4.2%	1.7%	3.9%
7	1.8%	0.5%	1.3%
6	0.5%	0.0%	0.3%
5	0.4%	0.1%	0.4%
4	0.1%	0.0%	0.0%
3	0.1%	0.0%	0.0%
2	0.1%	0.0%	0.1%
1 – Definitely will NOT return	0.1%	0.0%	0.0%
Mean Score	9.7	9.9	9.8
Sample Size:	1,440	805	1,433

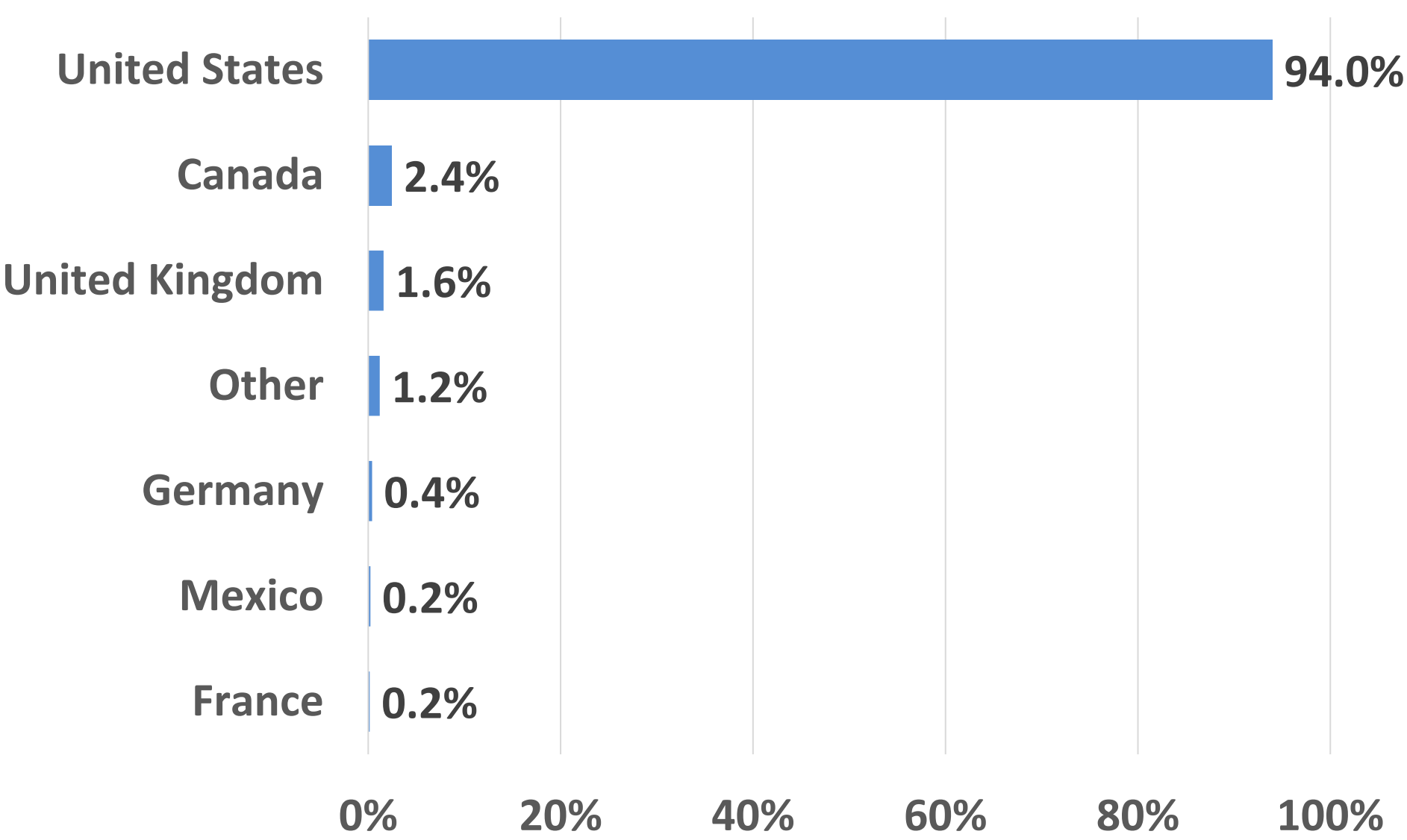


Calendar Year 2022 Point of Origin & Demographic Profile

Calendar Year 2022 Point Of Origin: Country

Most St. Pete/Clearwater visitors surveyed during CY 2022 live in the United States (94.0%) with a few (6.0%) coming from other countries. Canada (2.4%) and the United Kingdom (1.6%) primarily represented international visitors surveyed.

Figure 29: Country of Origin



Question: In what country do you reside? Base: All Respondents. 4,878 responses.

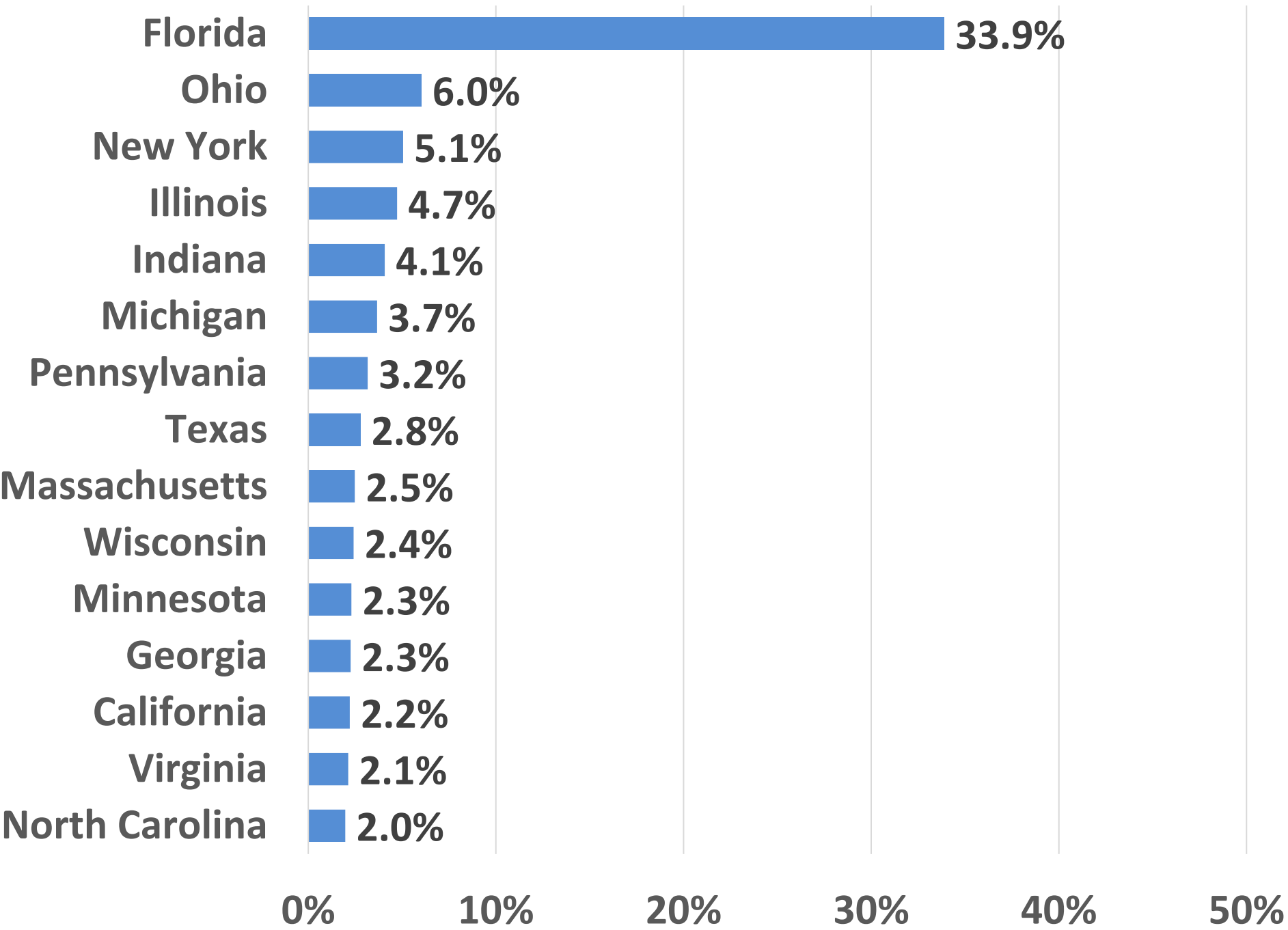
Detail by Place of Stay

	Hotel	VFR	Day Trip
United States	93.4%	93.2%	94.7%
Canada	2.4%	3.9%	1.5%
United Kingdom	1.9%	0.5%	1.7%
Other	1.6%	1.8%	1.1%
Germany	0.4%	0.0%	0.5%
Mexico	0.0%	0.6%	0.3%
France	0.3%	0.0%	0.2%
Sample Size:	1,375	778	1,370

2022 Calendar Year Point Of Origin: Top States of Residence (Domestic Visitors)

Two-thirds of 2022 visitors reside outside Florida (66.1%, up from 60.8% in 2021 and 55.0% in 2020). The trend indicates that Florida is generating more tourism revenue from outside the state. Ohio contributed the largest share of out-of-state domestic visitors (6.0%), followed by New York (5.1%) and Illinois (4.7%). Not surprisingly, the largest share of day trippers continue to be Florida residents (48.9%).

Figure 30: State of Origin



Question: What is your zip/postal code? Base: Domestic respondents. 4,598 responses.

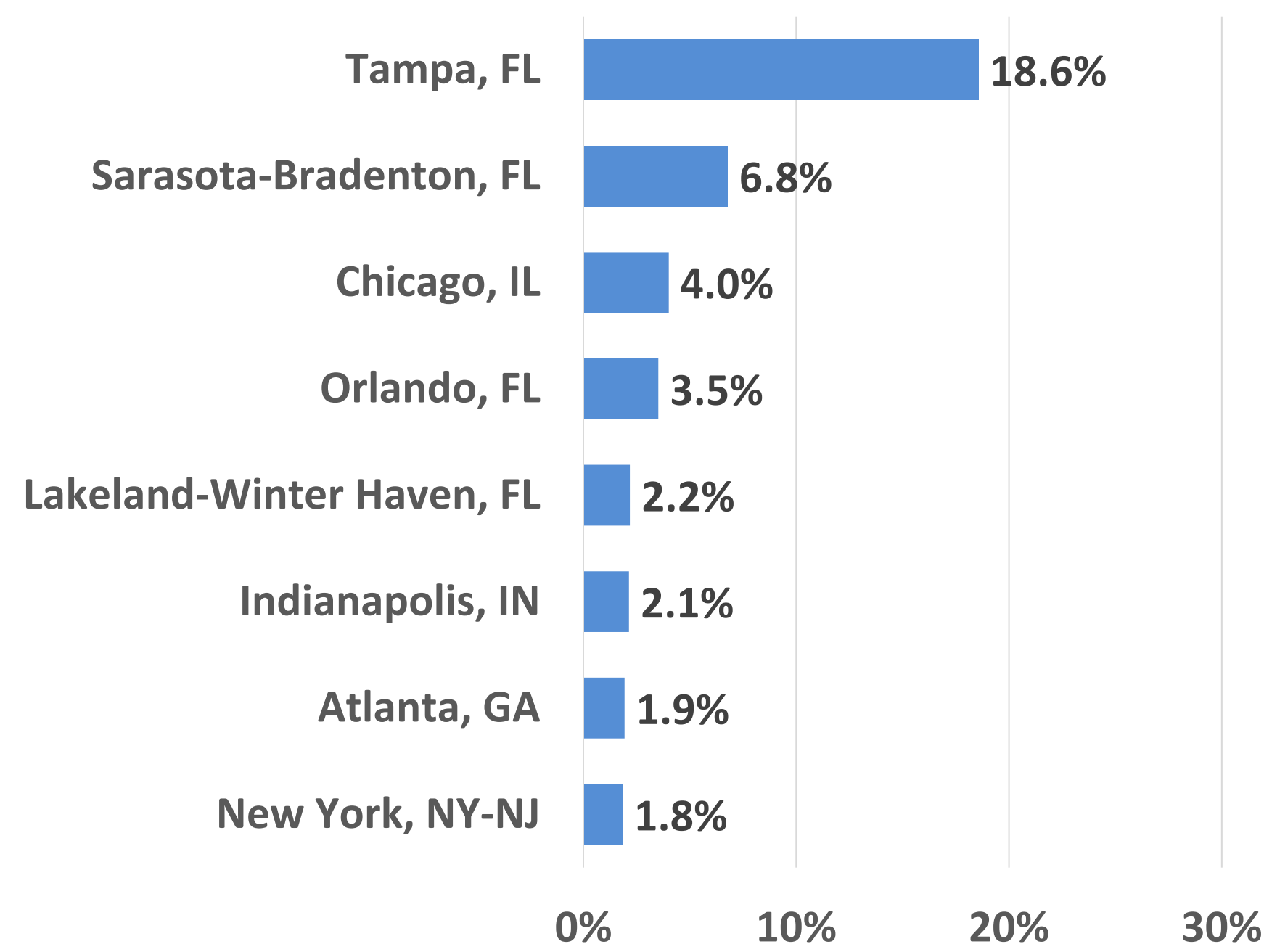
Detail by Place of Stay

	Hotel	VFR	Day Trip
Florida	15.1%	10.1%	48.9%
Ohio	8.3%	9.4%	3.8%
New York	6.0%	8.9%	4.0%
Illinois	6.4%	6.6%	3.2%
Indiana	4.0%	3.9%	3.5%
Michigan	5.7%	3.8%	2.3%
Pennsylvania	4.5%	3.1%	2.3%
Texas	4.4%	6.1%	1.8%
Massachusetts	3.1%	3.3%	2.1%
Wisconsin	3.4%	1.8%	2.0%
Minnesota	2.0%	2.0%	2.2%
Georgia	2.9%	3.3%	1.8%
California	1.9%	6.2%	1.8%
Virginia	3.1%	3.1%	1.6%
North Carolina	1.5%	2.5%	2.1%
Sample size:	1,334	721	1,320

2022 Calendar Year Point Of Origin: MSA (Domestic Visitors)

Tampa continues to top the in-state visitor market (18.6%, similar to 19.4% in 2021). Following Tampa, other leading in-state markets are: Sarasota-Bradenton (6.8%), Orlando (3.5%), and Lakeland-Winter Haven (2.2%). Chicago (4.0%), Indianapolis (2.1%), and Atlanta (1.9%) remain the top out-of-state visitor markets.

Figure 31: MSA



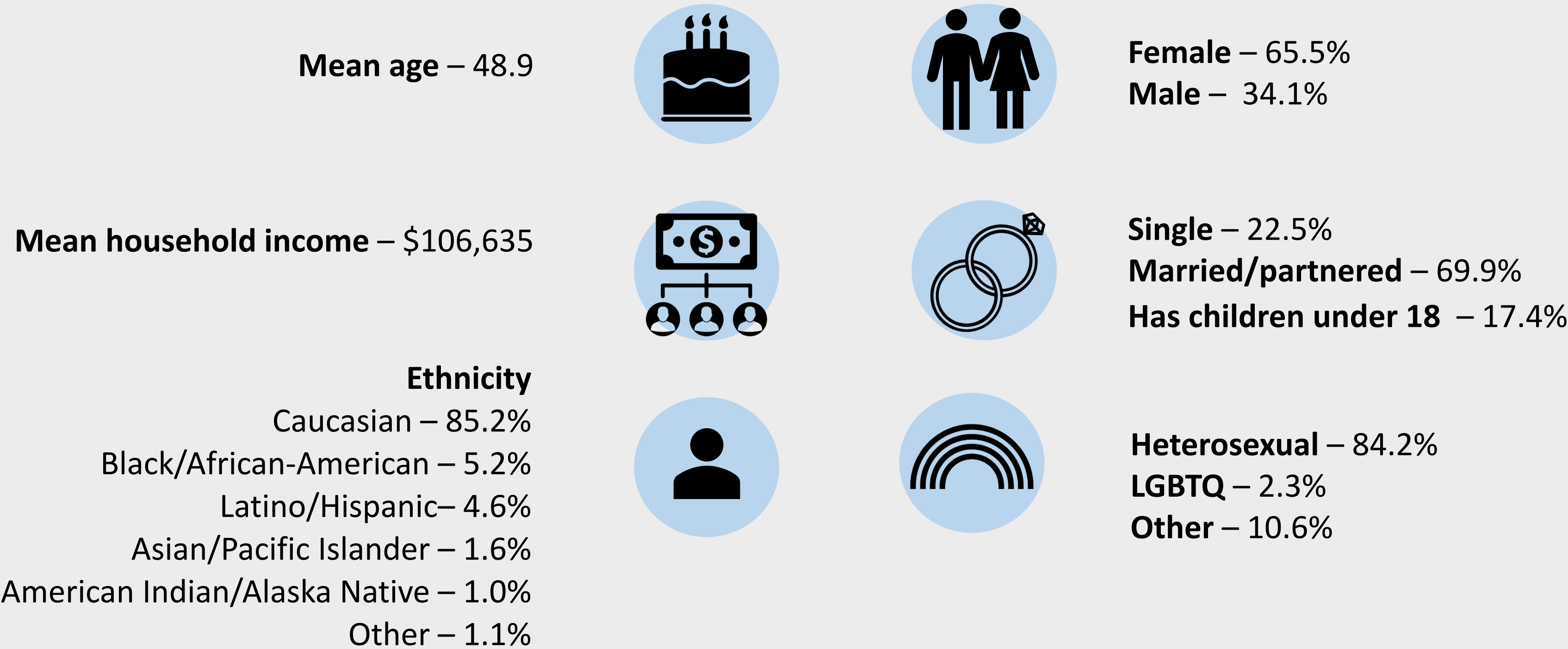
Question: What is your zip/postal code? Base: Domestic respondents. 4,063 responses.

Detail by Place of Stay

	Hotel	VFR	Day Trip
Tampa, FL	2.4%	1.6%	28.8%
Sarasota-Bradenton, FL	0.7%	1.4%	10.4%
Chicago, IL	5.3%	6.3%	2.8%
Orlando, FL	3.3%	2.6%	4.1%
Lakeland-Winter Haven, FL	1.4%	0.1%	3.0%
Indianapolis, IN	1.3%	2.2%	2.0%
Atlanta, GA	2.7%	2.6%	1.5%
New York, NY-NJ	2.2%	4.8%	1.2%
Sample Size:	1,161	614	1,201

2022 Calendar Year Demographic Profile

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



**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.*

2022 Calendar Year Demographic Profile by Visitor Segment

The following presents the demographic profiles for each visitor segment surveyed in the 2022 calendar year.

	Hotel	VFR	Day Trip
Female	61.2%	68.9%	65.4%
Male	38.6%	30.8%	33.9%
Mean Age	50.4	47.8	48.4
Single	14.4%	32.3%	25.9%
Married	78.1%	61.1%	66.1%
Has Children	19.4%	17.9%	16.4%
Annual Household Income	\$110,179	\$100,102	\$104,749

	Hotel	VFR	Day Trip
Caucasian	88.0%	79.8%	83.8%
Black/African-American	3.7%	10.2%	5.5%
Latino/Hispanic	3.2%	3.8%	5.6%
Asian/Pacific Islander	1.2%	1.4%	2.0%
American Indian/Alaska Native	1.2%	3.1%	0.6%
Other	1.6%	0.9%	1.1%
Heterosexual	87.1%	70.4%	83.9%
LGBTQ	1.6%	2.9%	2.6%