



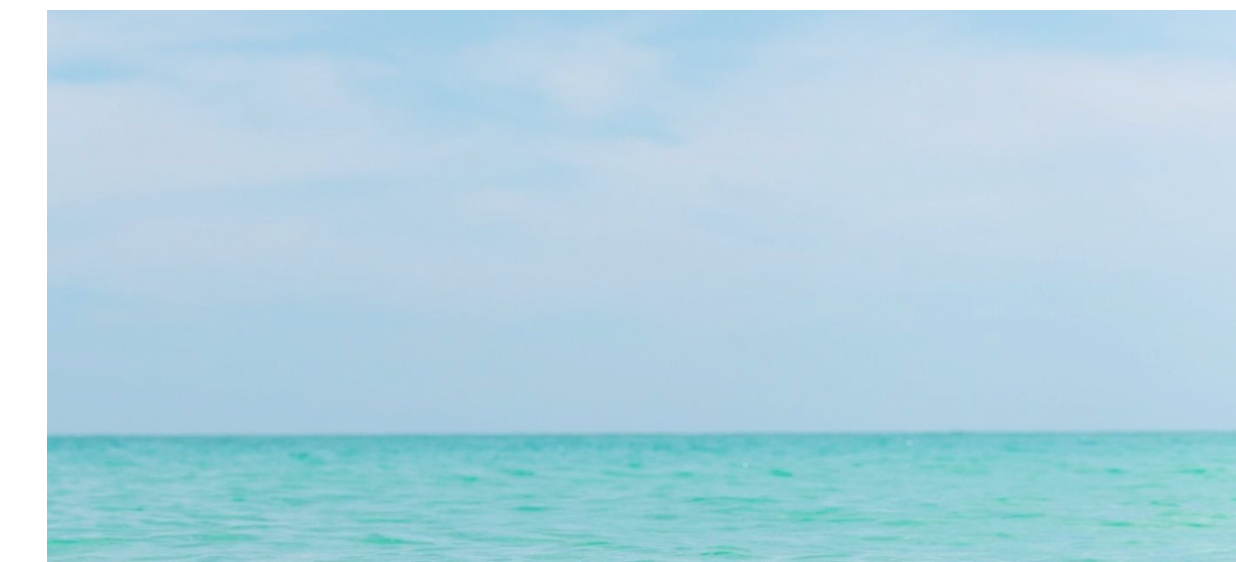
Visit St. Pete/Clearwater

Advertising Campaign
Awareness & ROI Presentation

Fall-Winter 2021/22 Campaign

September 2022

Destination  Analysts



RESEARCH OBJECTIVES & OVERVIEW

1. Evaluate the campaign's reach and impact, including:

- Unaided marketing recall and aided advertising awareness
- Influence of advertising on brand perceptions and travel behavior
- Optimal media mix for destination awareness

2. Quantify the Return on Advertising Investment, including:

- Incremental visitation and spending influenced by the campaign
- Incremental tax revenues generated by the campaign



RESEARCH METHODOLOGY

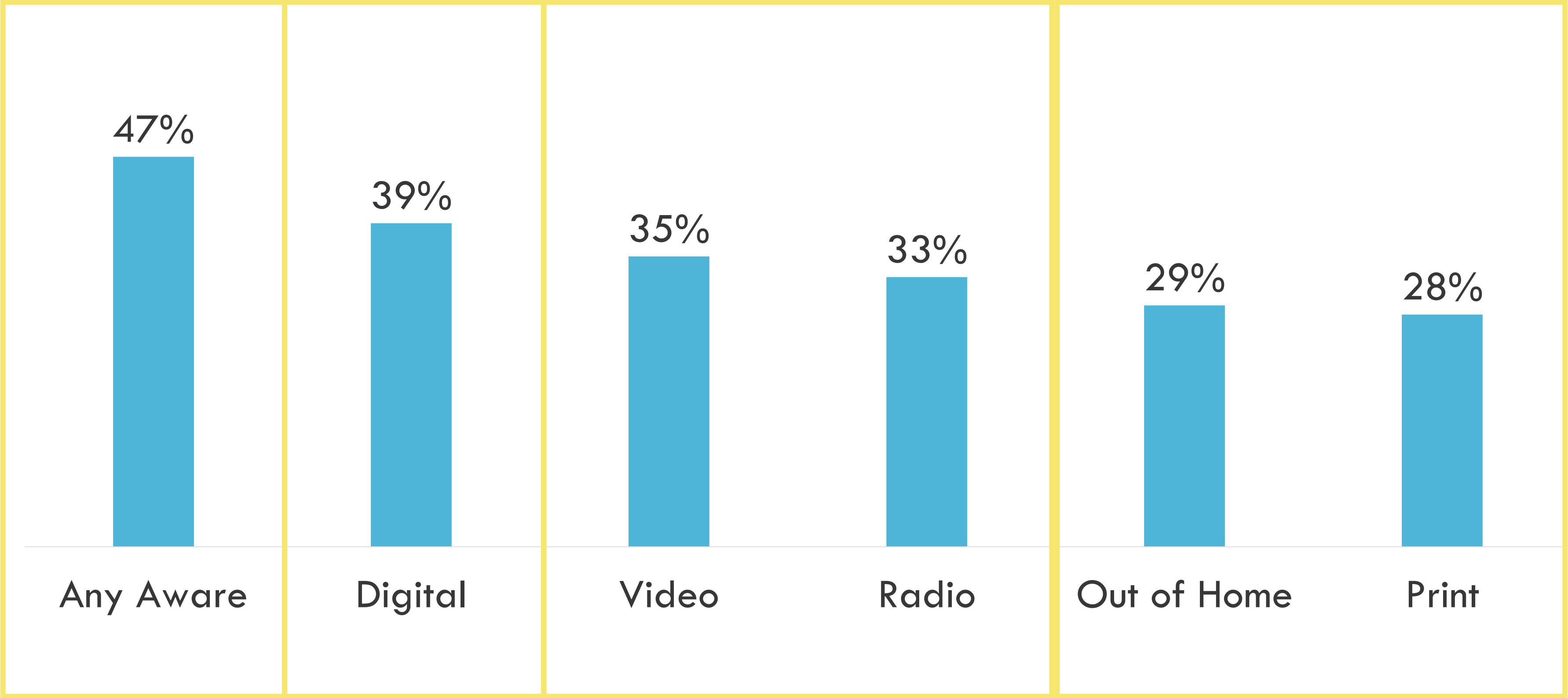
- Adults ages 25 – 65
- Annual household income of \$40,000 if single, \$60,000 if married
- Traveled at least once overnight for leisure to a destination 50 miles or more from their primary residence in the past 2 years
- Reside in one of the geographic markets targeted by the advertising campaign

Markets	Sample Collected
Atlanta	400
Charlotte	200
Chattanooga	50
Chicago	200
Cincinnati	200
Cleveland	200
Columbus	200
Ft. Myers-Naples	50
Indianapolis	200
Jacksonville	200
Knoxville	100
Louisville	200
Miami-Ft. Lauderdale	400
Nashville	200
Pittsburgh	200
Orlando	400
St. Louis	200
Total	3,500

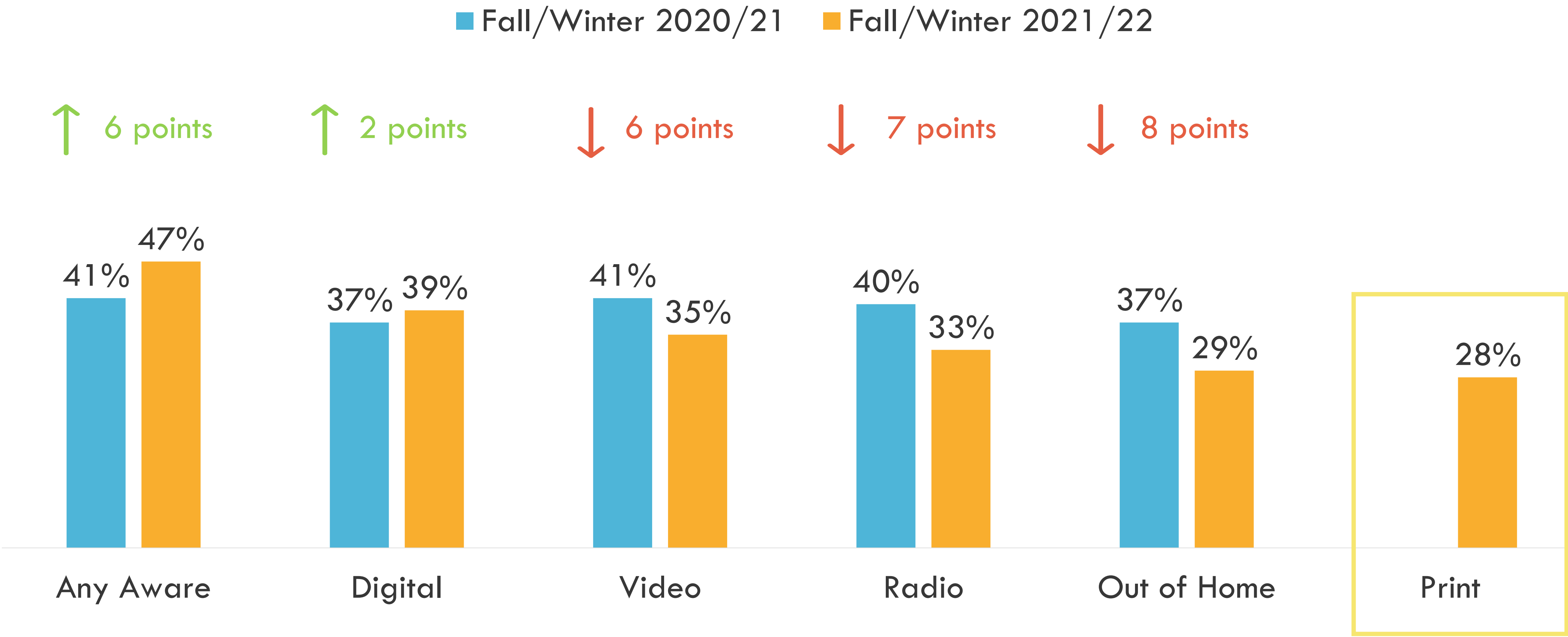
An aerial photograph of a tropical coastline. The water is a vibrant turquoise, transitioning to a lighter green near the shore. A narrow, sandy beach runs along the bottom right, with a few small boats and people visible. In the distance, a small island with palm trees is visible, and the horizon is marked by a line of land under a blue sky with scattered white clouds.

FALL-WINTER 2021/2022 TOPLINE RESULTS

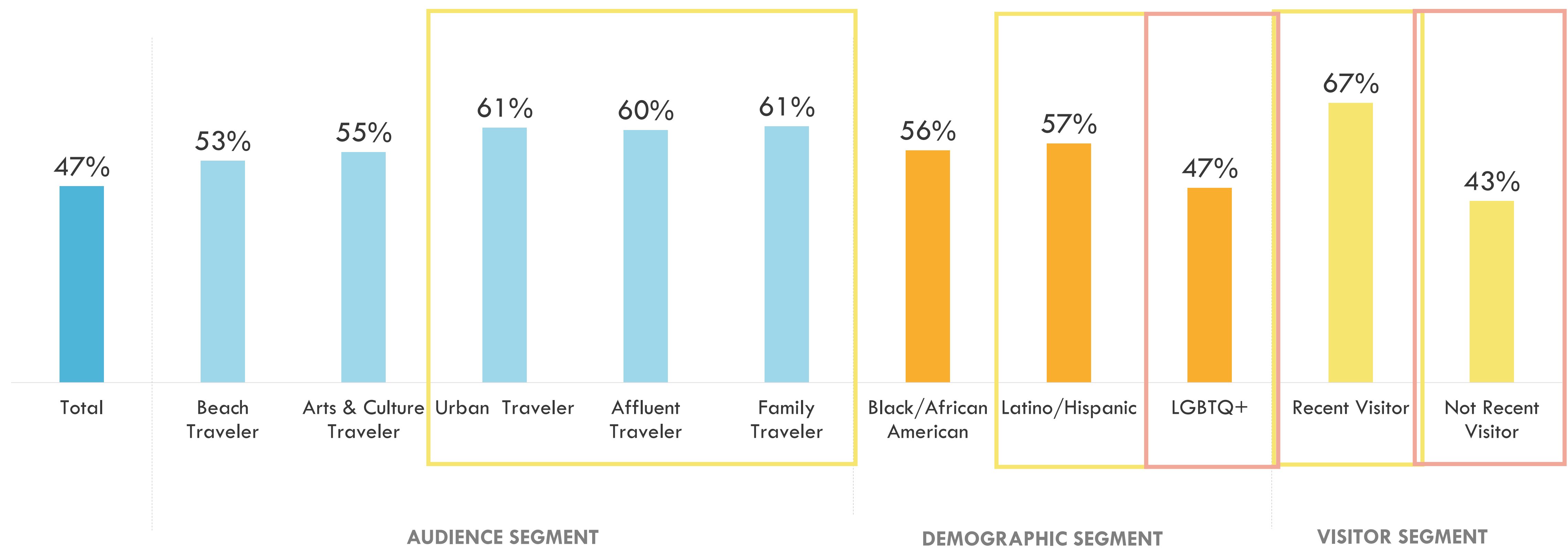
CAMPAIGN AWARENESS BY CHANNEL



CAMPAIGN AWARENESS BY CHANNEL



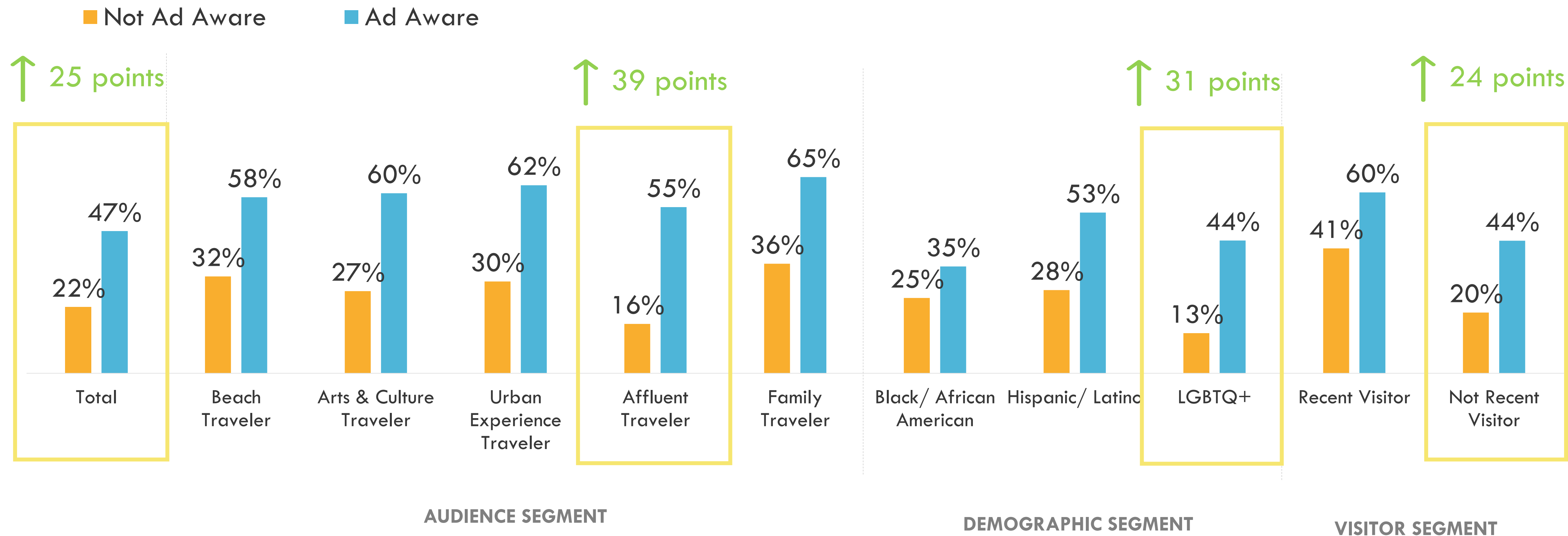
CAMPAIGN AWARENESS BY SEGMENT



CAMPAIGN AWARENESS BY MARKET

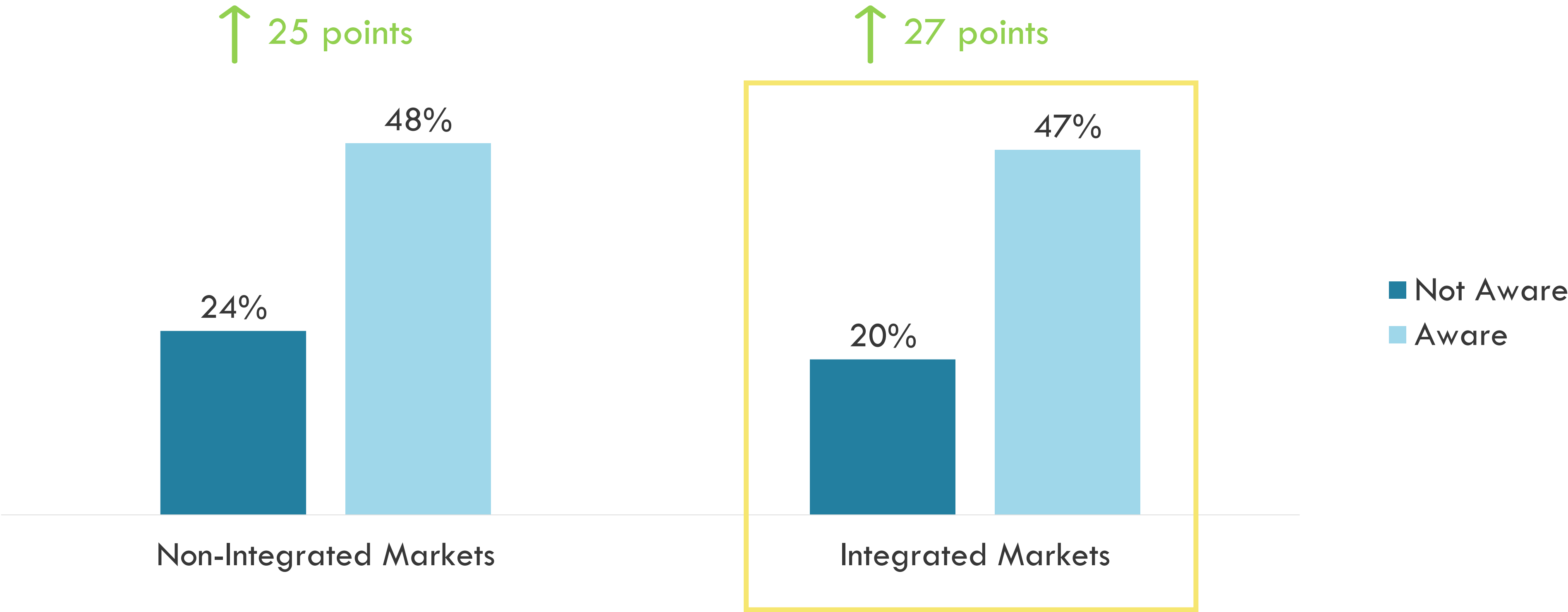


IDEAL FIT PERCEPTIONS BY SEGMENT & AWARENESS



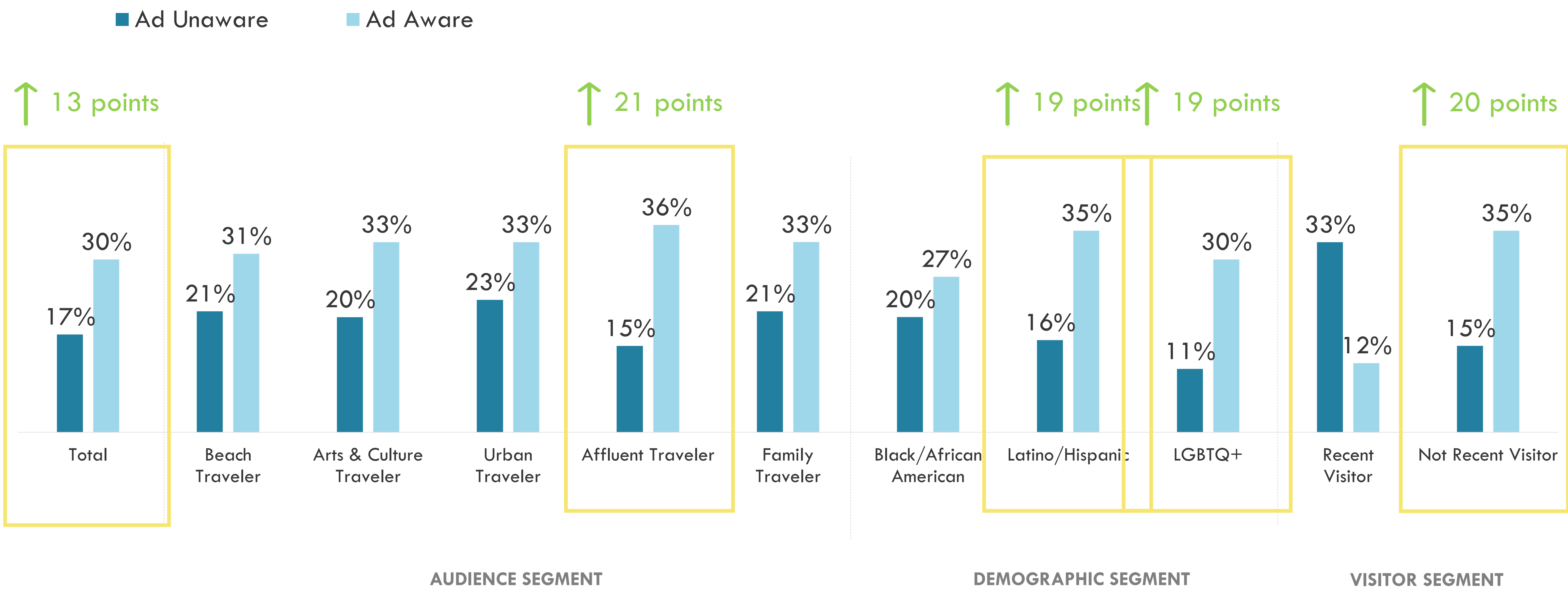
Question: Based on your current perceptions, to what degree is a vacation/getaway in St. Pete/Clearwater, Florida an ideal fit for who you are as a traveler? Base: All respondents, 3,500 responses.

IDEAL FIT PERCEPTIONS BY MARKET & AWARENESS

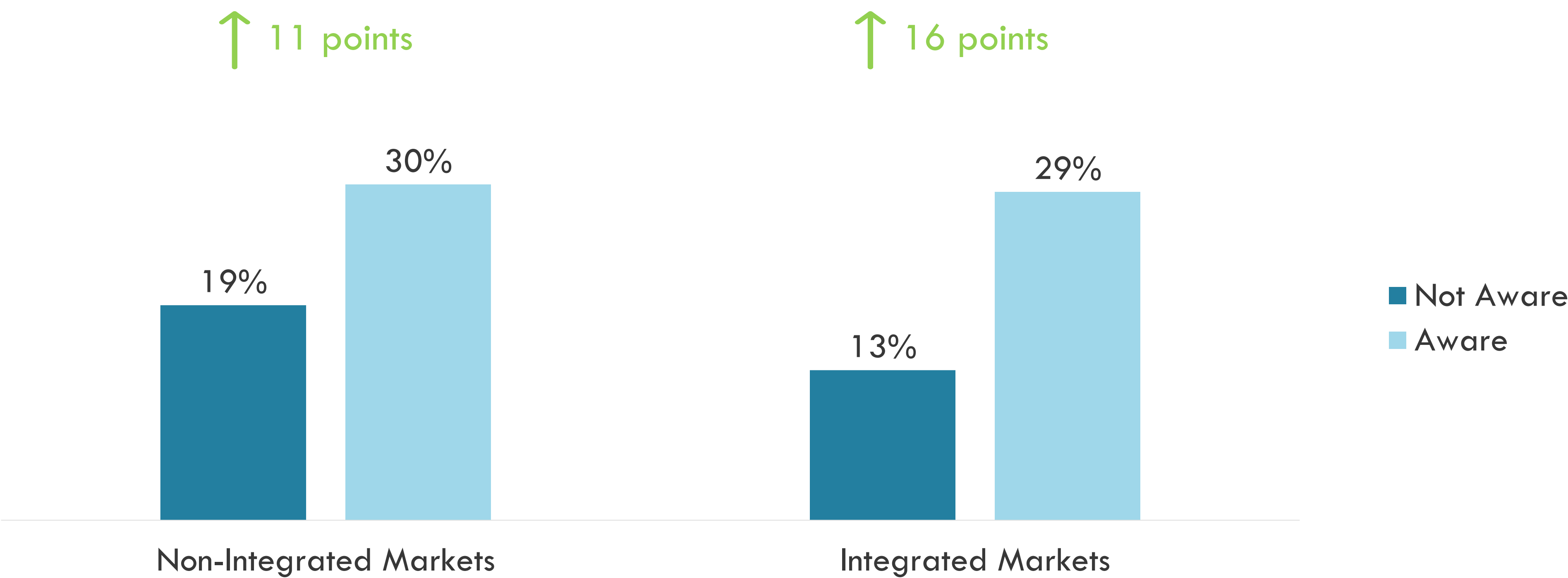


Question: Based on your current perceptions, to what degree is a vacation/getaway in St. Pete/Clearwater, Florida an ideal fit for who you are as a traveler? Base: All respondents, 3,500 responses.

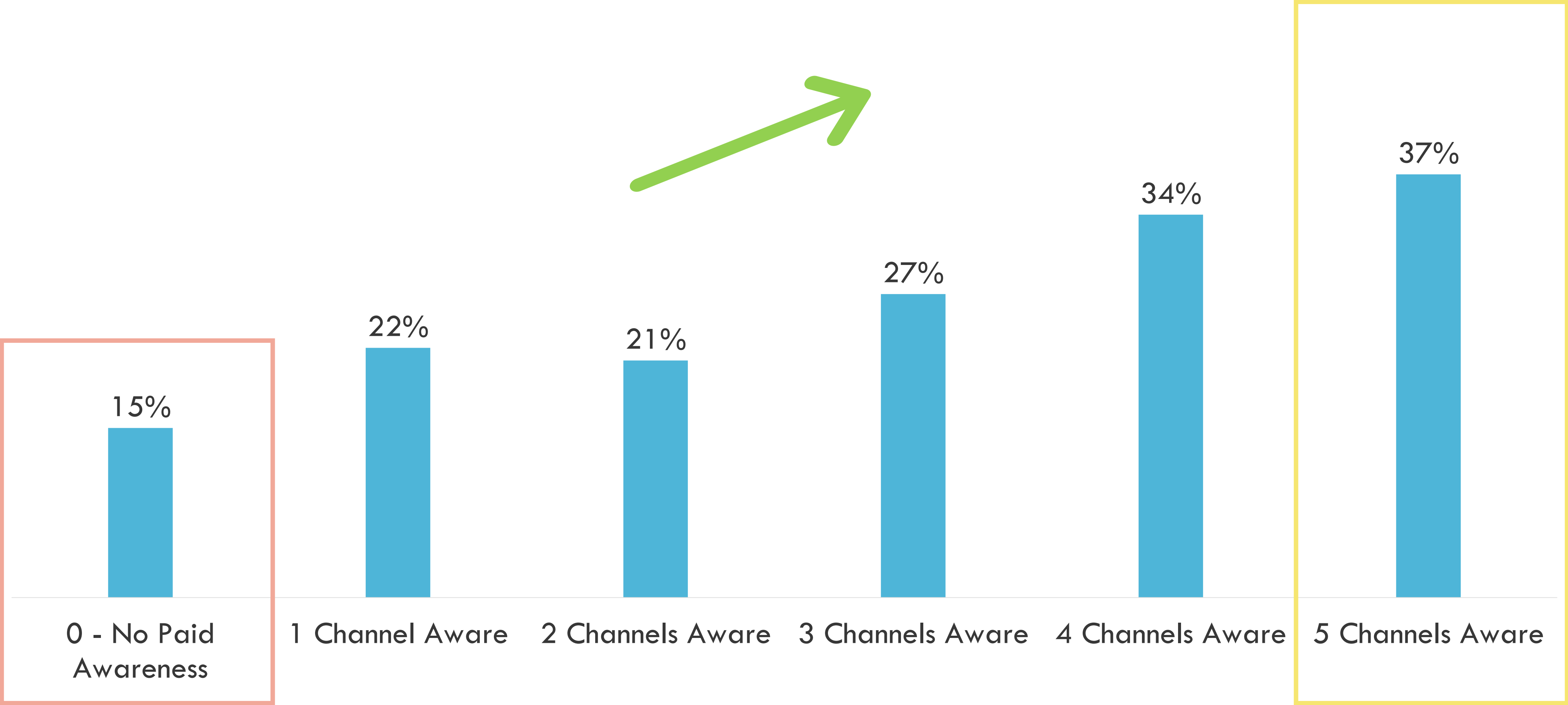
NEXT 12 MONTH TRAVEL INTENTIONS BY SEGMENT & AWARENESS



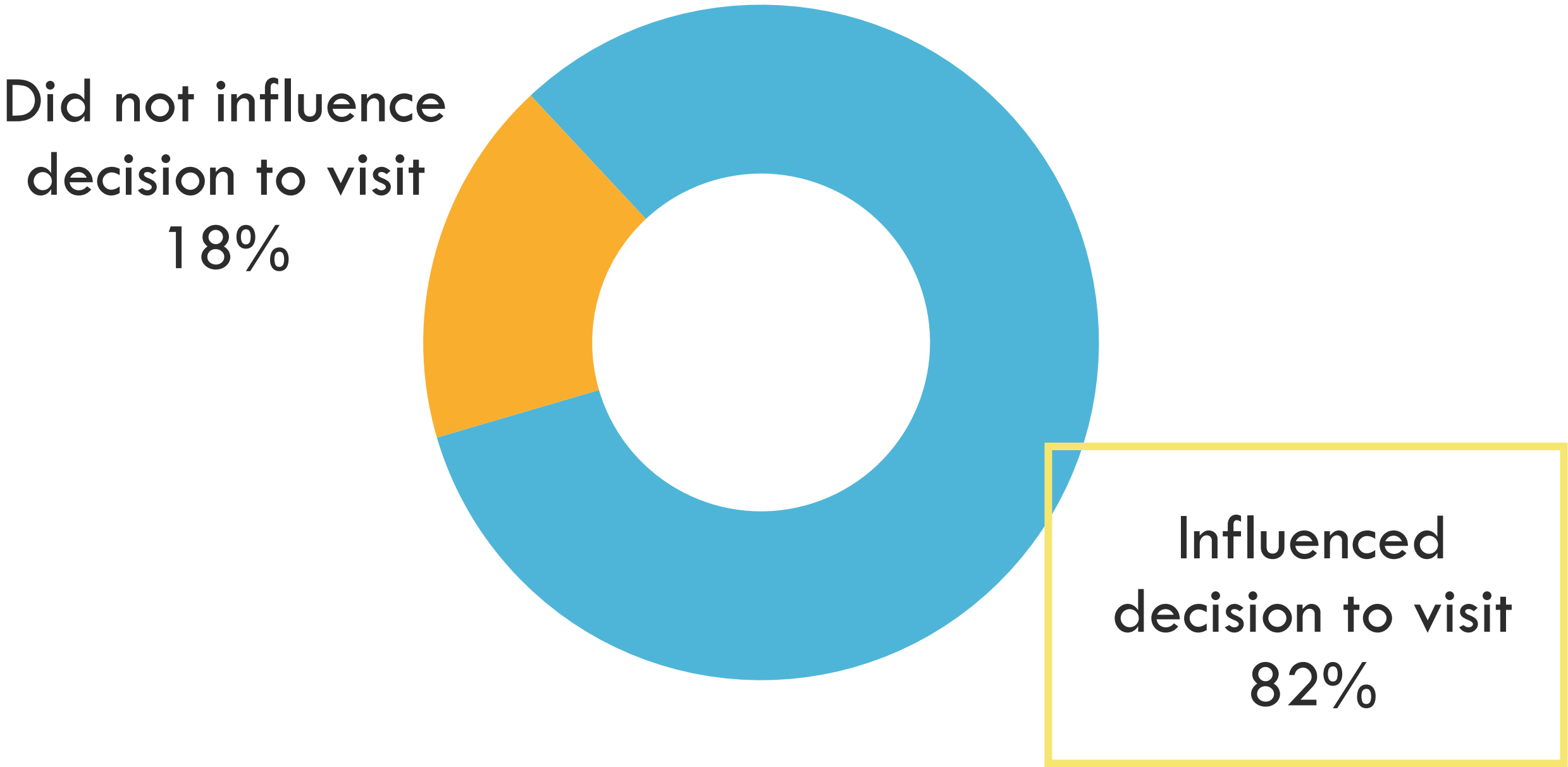
NEXT 12 MONTH TRAVEL INTENTIONS BY MARKET & AWARENESS



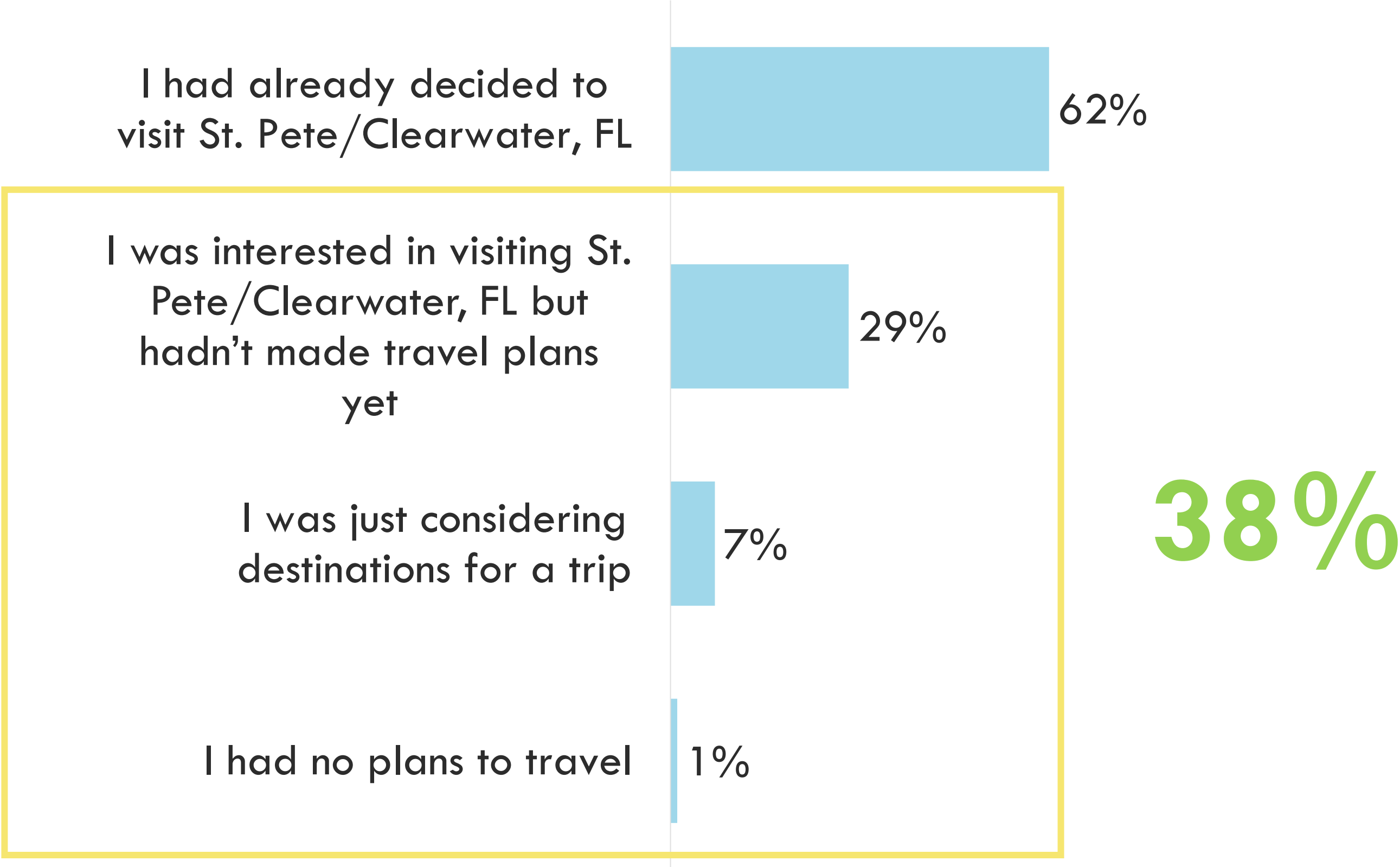
NEXT 12 MONTH TRAVEL INTENTIONS BY CHANNEL FREQUENCY



CAMPAIGN IMPACT ON DECISION TO VISIT

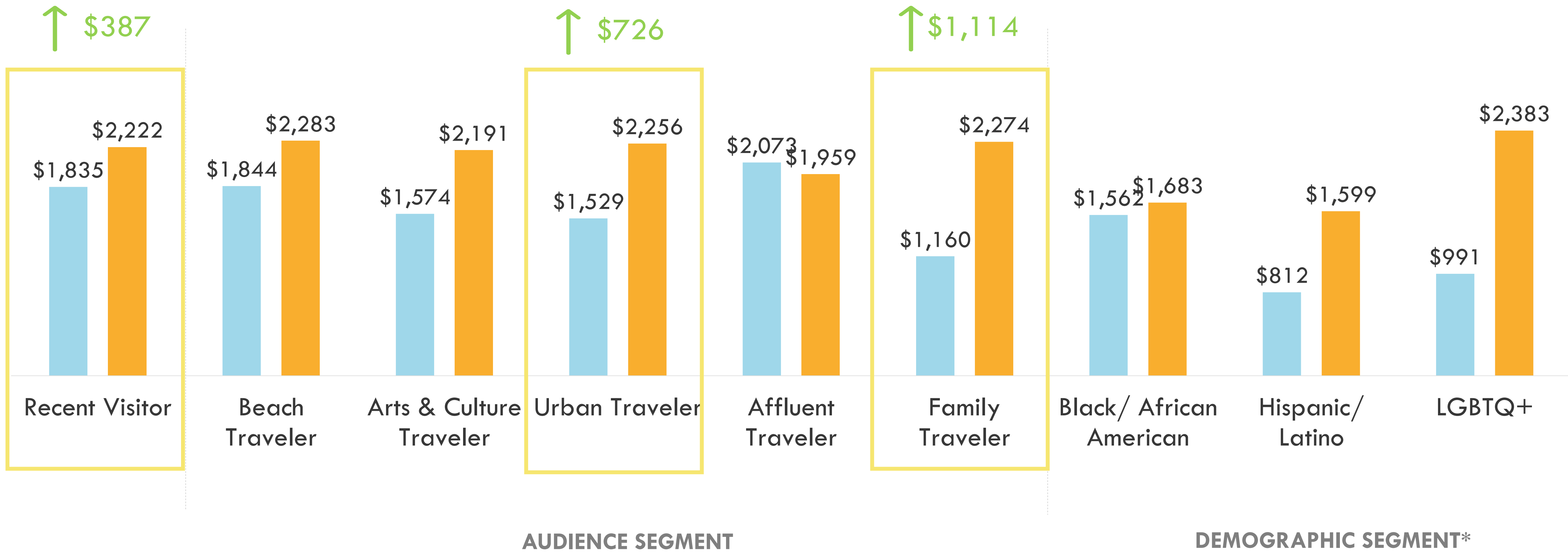


PLANNING POINT IMPACTED



PER PARTY PER TRIP SPEND AWARE VS UNAWARE

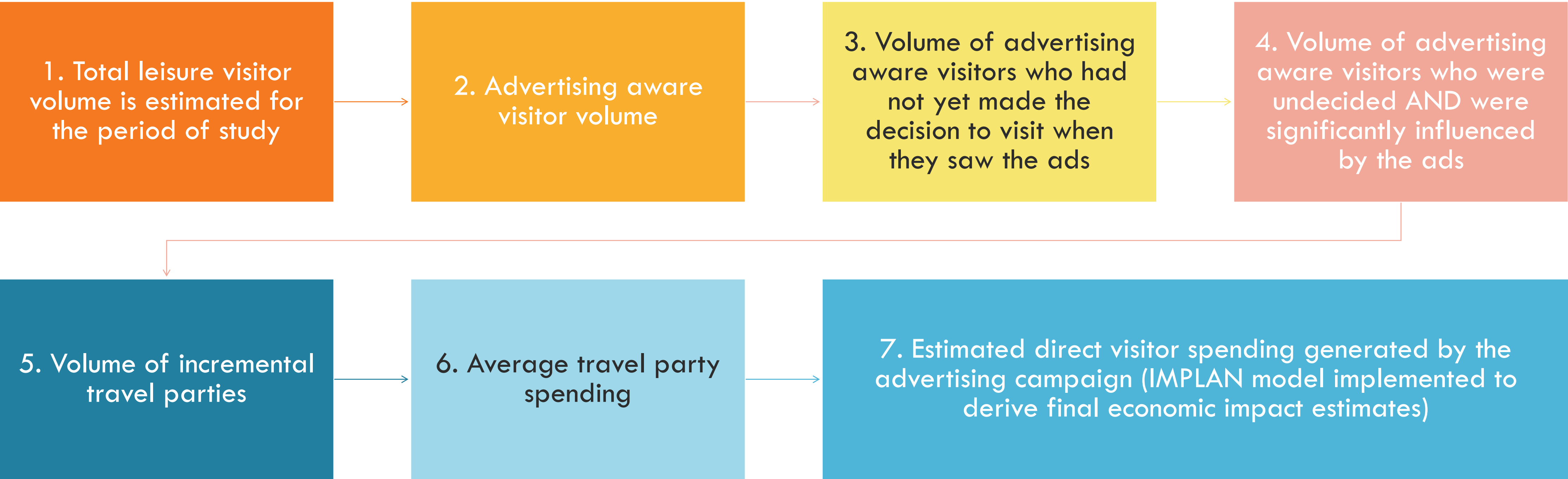
■ Unaware ■ Aware



*small sample

RETURN ON INVESTMENT ANALYSIS

The following determines the impact of Visit St. Pete/Clearwater’s Fall-Winter 2021-2022 campaign in bringing visitors to the destination between October 2021 – May 2022.



RETURN ON INVESTMENT RESULTS

**Total direct visitor spending
generated by the campaign**

\$1 53,767,500

RETURN ON INVESTMENT RESULTS

**Total economic impact generated
by the campaign (multipliers
included)**

\$247,812,000

RETURN ON INVESTMENT RESULTS

Overall ROI (multipliers included)	\$35.74
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RETURN ON INVESTMENT RESULTS

Tax ROI (multipliers included)	\$1.55
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RETURN ON INVESTMENT RESULTS

Economic Impact of St. Pete/Clearwater's Fall-Winter Campaigns				
	2020/21	2021/22	Volume Change	Percent Change
Total direct visitor spending generated by the campaign	\$137,807,234	\$153,767,500	+\$15,960,266	+12%
Total economic impact generated by the campaign (multipliers included)	\$219,666,903	\$247,812,000	+\$28,145,097	+13%
Campaign spend	\$6,344,950	\$6,934,561	+\$589,611	+9%
Overall ROI (multipliers included)	\$34.62	\$35.74	+\$1.12	+3%
Taxes generated by the campaign (multipliers included)	\$9,339,874	\$10,734,400	+\$1,394,526	+15%
Tax ROI (multipliers included)	\$1.47	\$1.55	+\$0.08	+5%



ST.PETE
CLEARWATER

Visit St. Pete/Clearwater VISITOR PROFILE STUDY

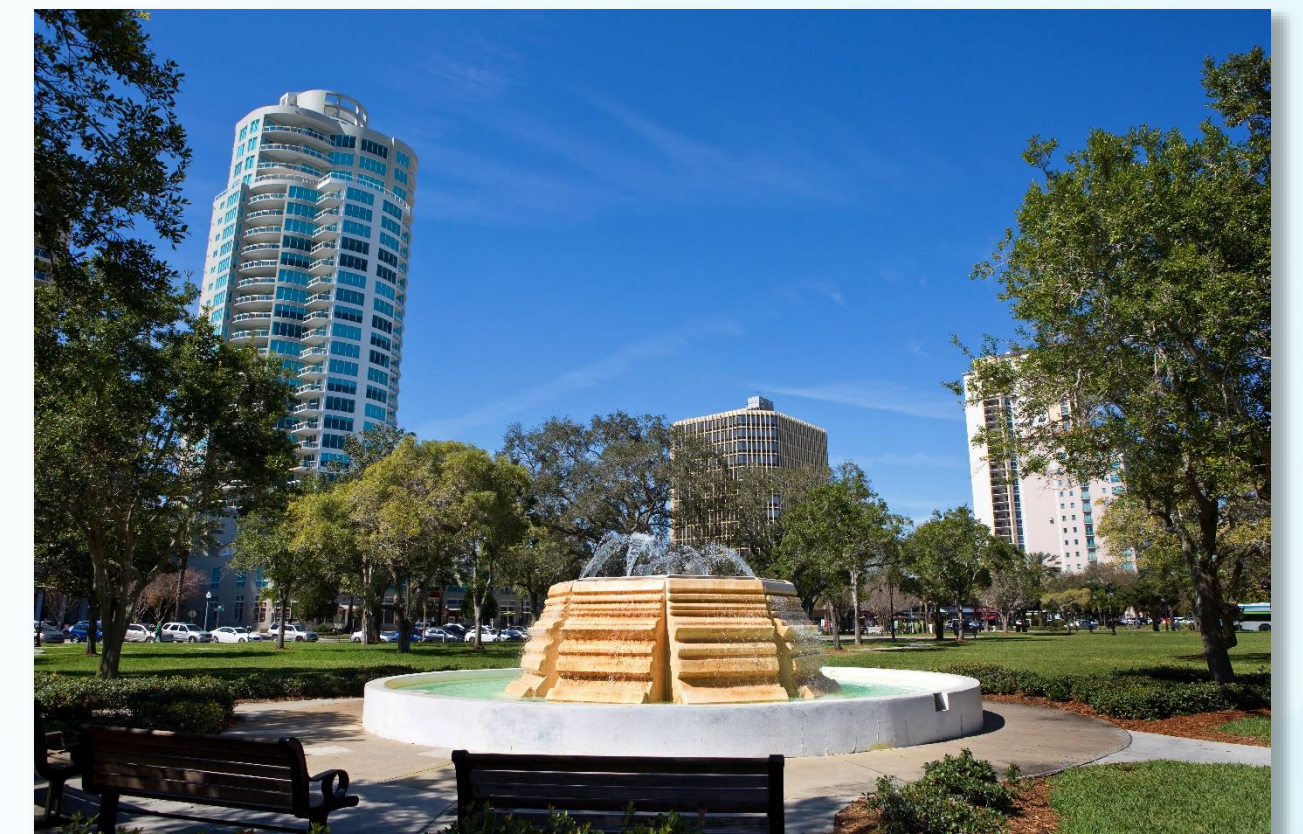
Presentation of Findings
Q2 2022

Research prepared for Visit St. Pete/Clearwater by:

Destination  Analysts

RESEARCH OVERVIEW & METHODOLOGY

- Ongoing in-person intercept survey of St. Pete/Clearwater area visitors at locations throughout the destination.
- Survey data collected from visitors between April 2022 — June 2022.
- Data has been weighted to be representative of the estimated volume of visitors by lodging type. Secondary inputs such as total hotel room inventory and average occupancy were also used in calculating these weights.
- In total, 1,228 completed surveys from Pinellas County visitors were collected this quarter.

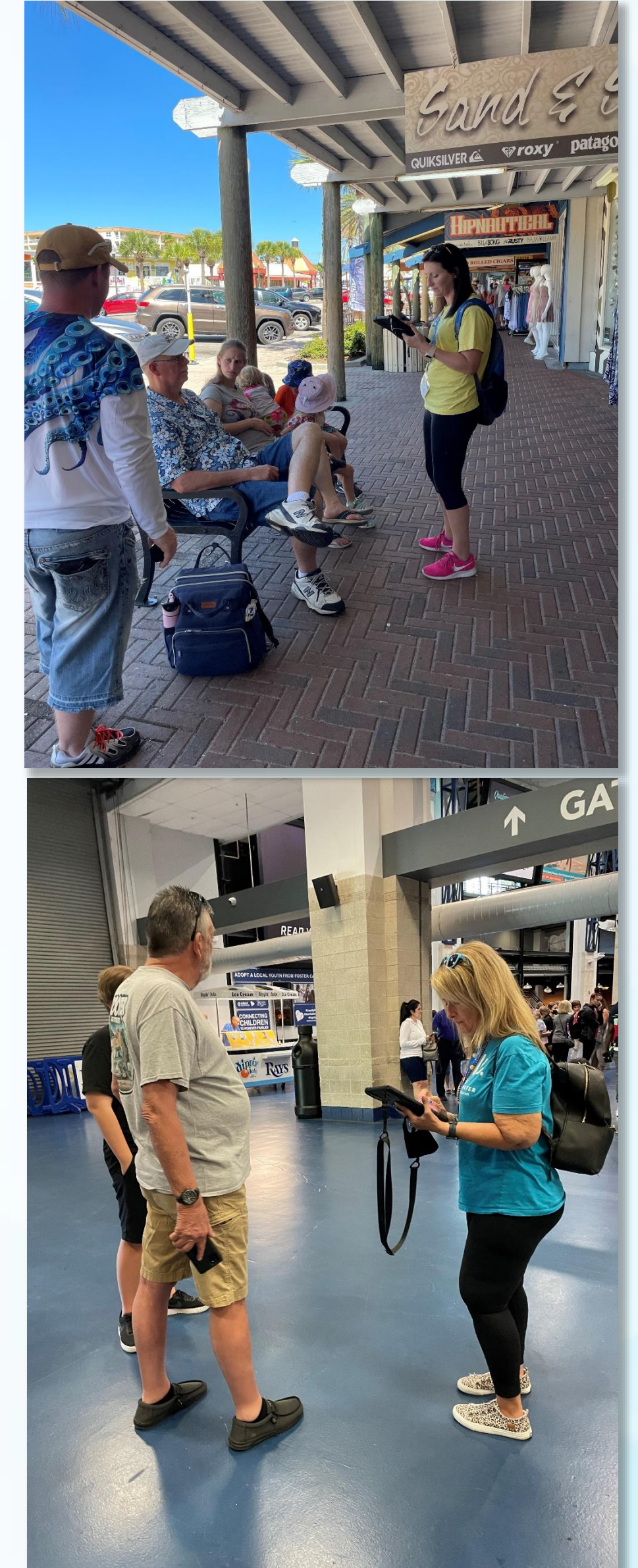


Above: Images of the St. Pete/Clearwater area.

RESEARCH OVERVIEW & METHODOLOGY

Survey 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



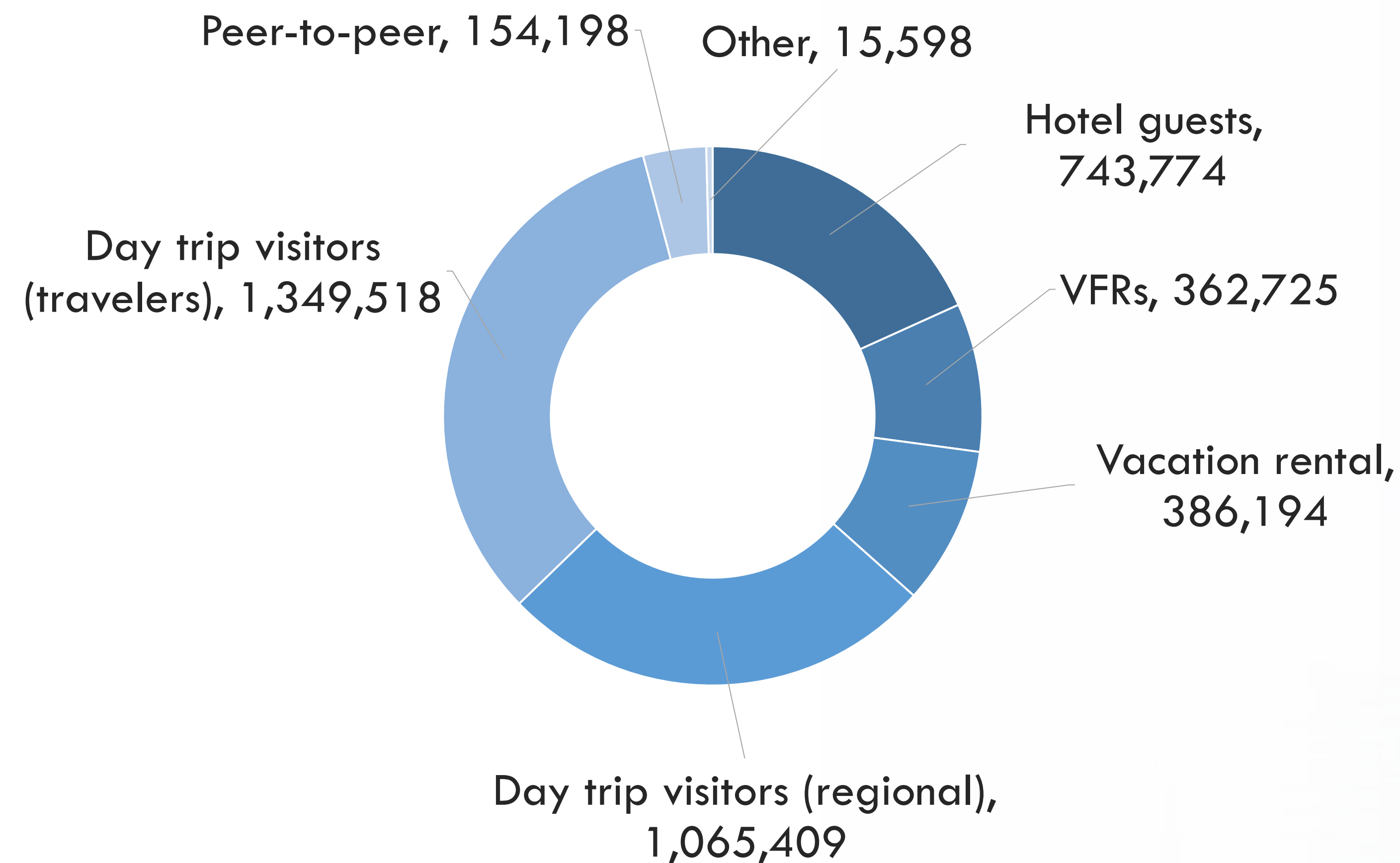
Above: Destination Analysts Field Research Team



Q2 2022

Economic Impact Estimates

VISITORS TO PINELLAS COUNTY

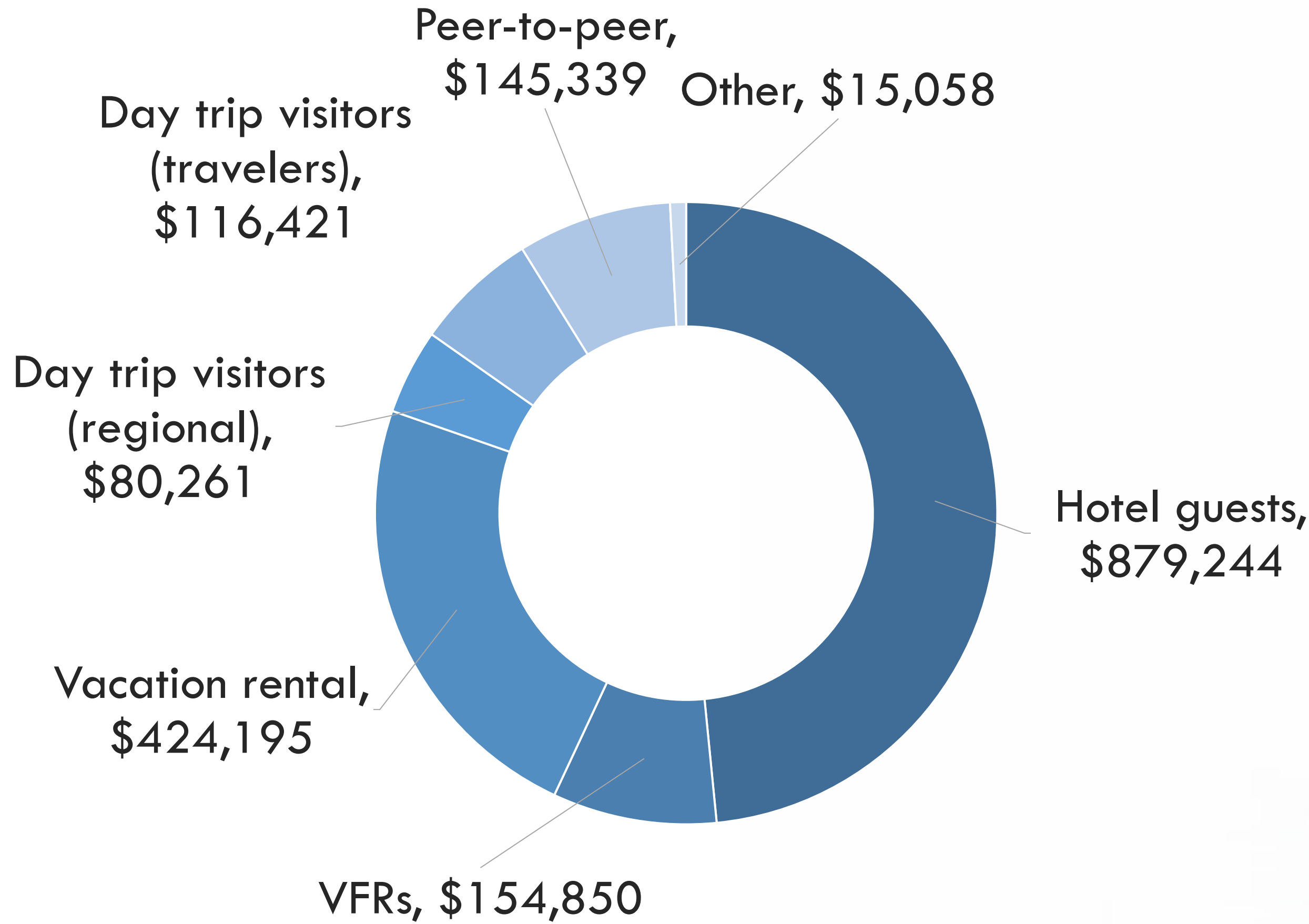


Visitors to Pinellas County, by type of visitor

Hotel guests	743,774
VFRs	362,725
Vacation rental	386,194
Day trip visitors (regional)	1,065,409
Day trip visitors (travelers)	1,349,518
Peer-to-peer	154,198
Other	15,598

TOTAL VISITORS	4,077,416
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DIRECT VISITOR SPENDING: BY TYPE OF VISITOR

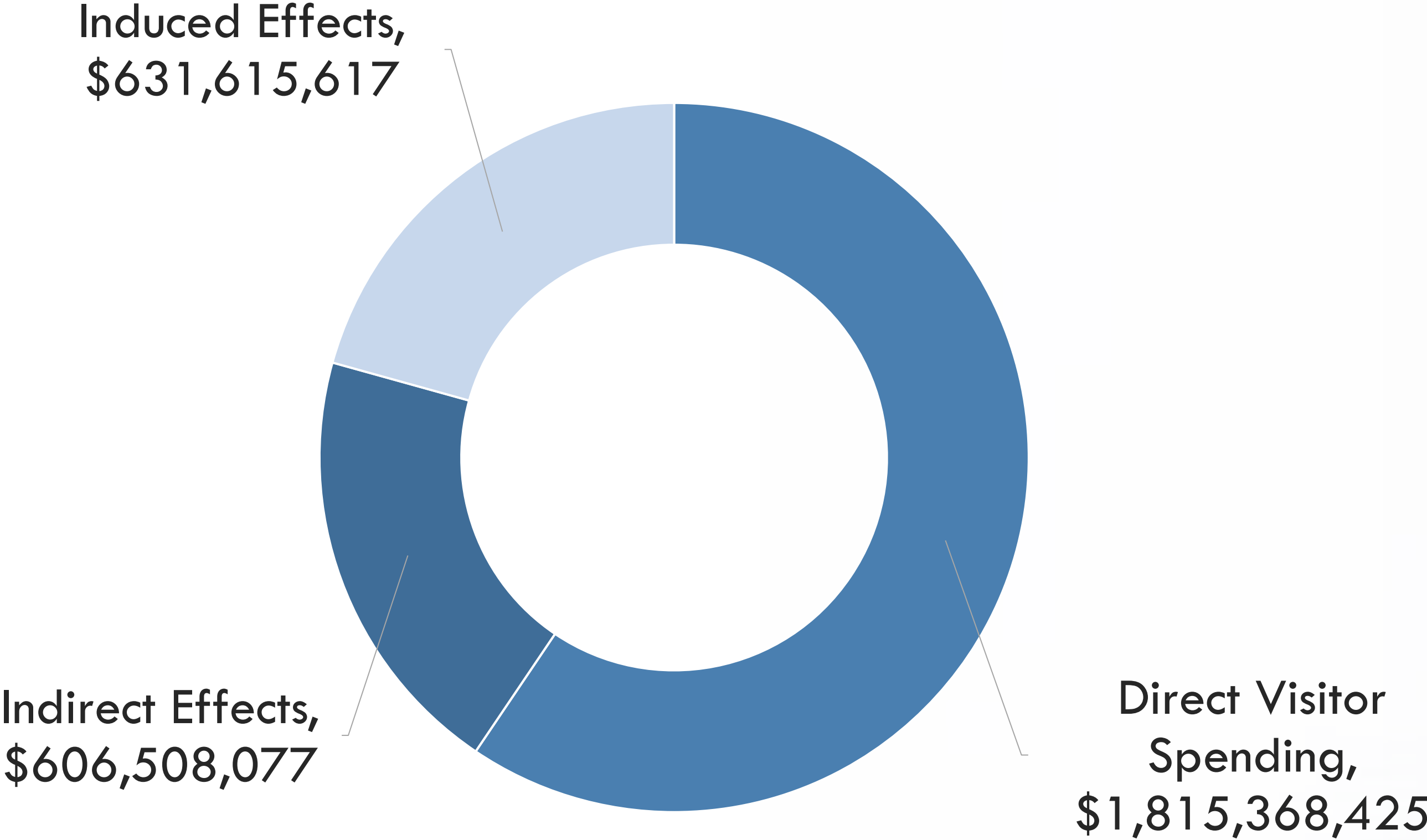


Spending in Pinellas County, by type of visitor
(in thousands)

Hotel guests	\$879,244
VFRs	\$154,850
Vacation rental	\$424,195
Day trip visitors (regional)	\$80,261
Day trip visitors (travelers)	\$116,421
Peer-to-peer	\$145,339
Other	\$15,058

TOTAL DIRECT VISITOR SPENDING	\$1,815,368
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TOTAL ECONOMIC IMPACT

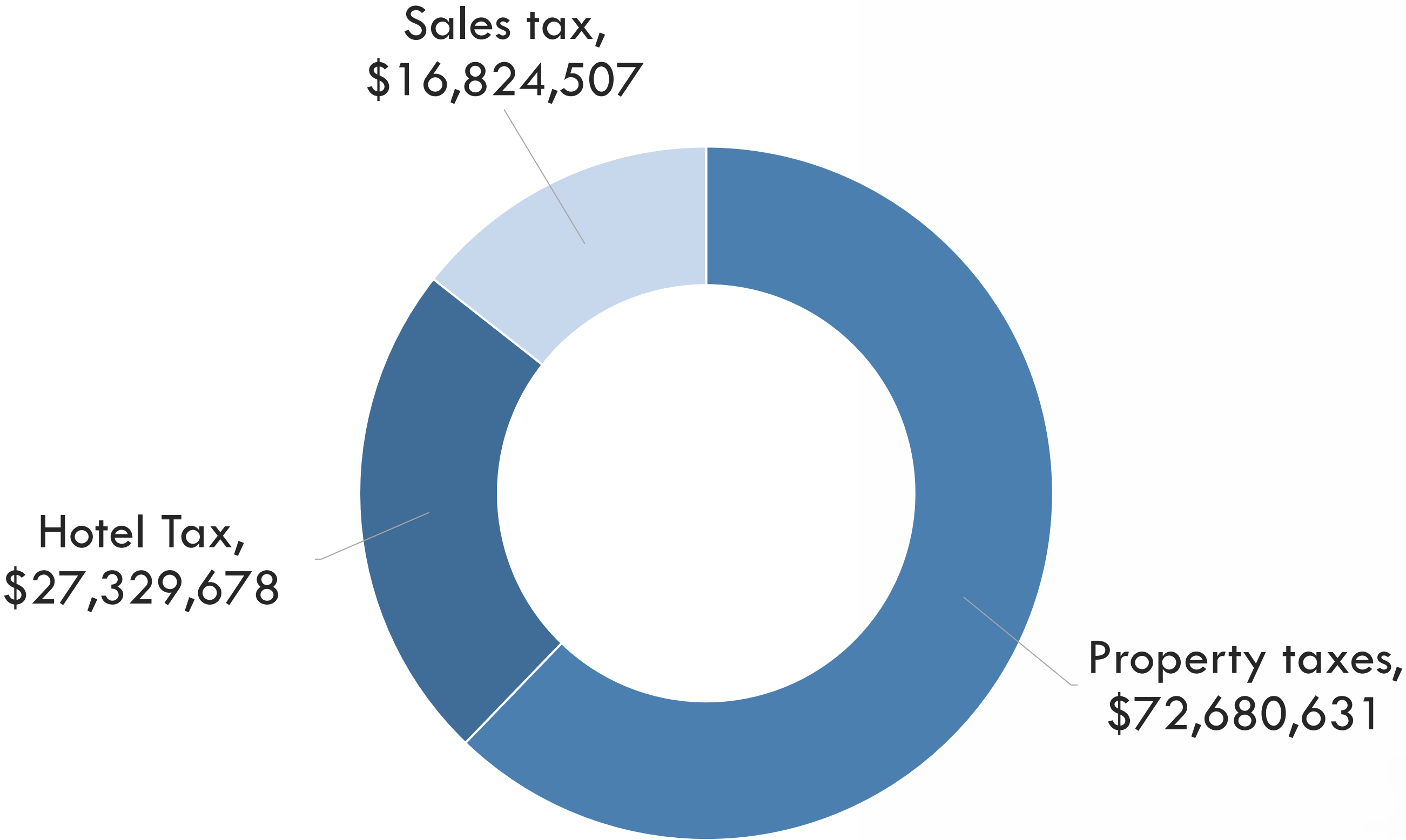


Economic Impact Estimates, by type of effect

Direct Visitor Spending	\$1,815,368,425
Indirect Effects	\$606,508,077
Induced Effects	\$631,615,617

TOTAL ECONOMIC IMPACT	\$3,053,492,119
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TAX REVENUES GENERATED



Tax Revenues Generated, by type of tax

Property taxes	\$72,680,631
Hotel Tax	\$27,329,678
Sales tax	\$16,824,507

TOTAL TAX REVENUES GENERATED	\$116,834,816
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ECONOMIC IMPACT YOY COMPARISON

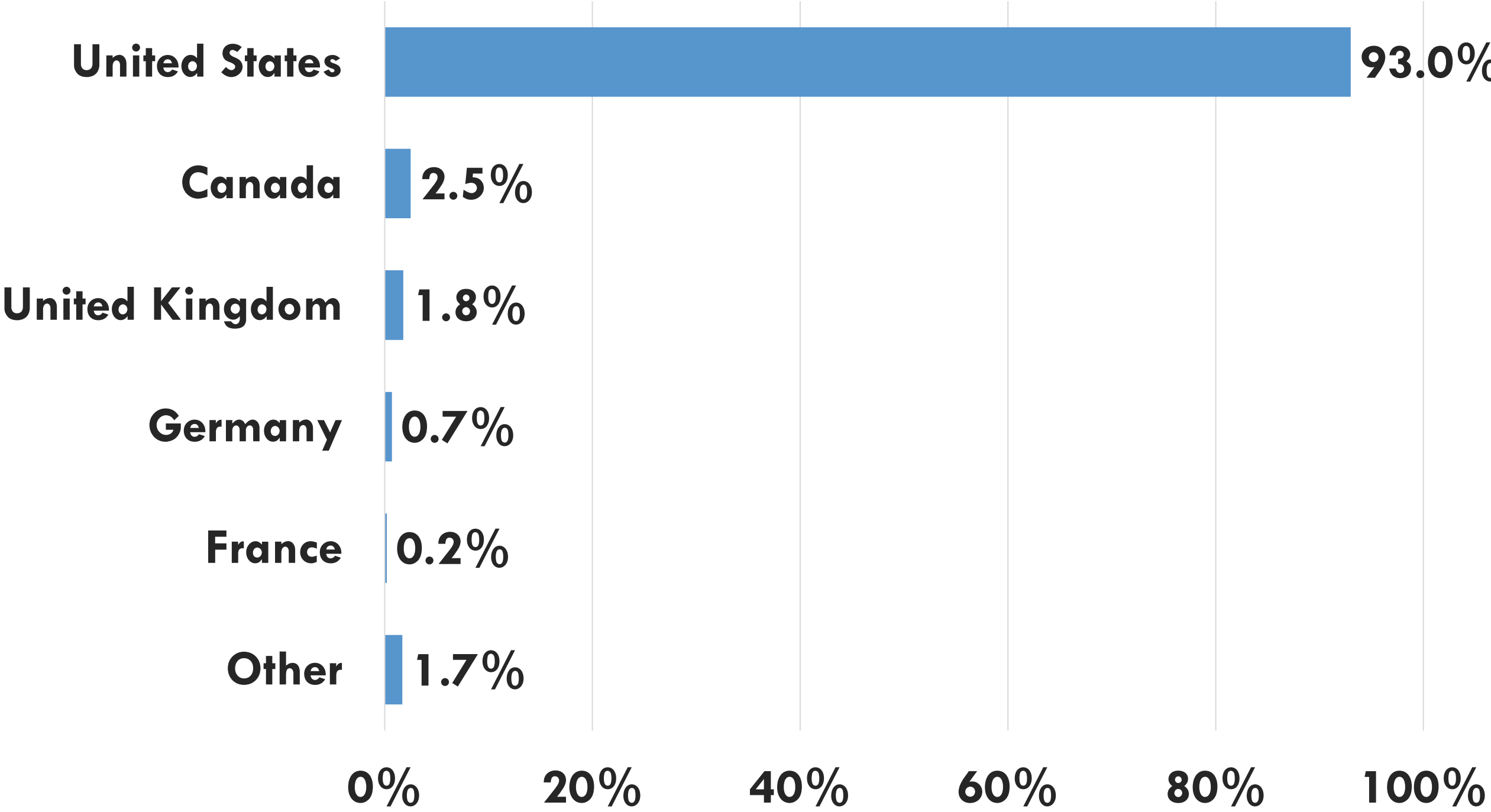
	Q2 2021	Q2 2022	% Change	Q2 2019	Q2 2022	% Change
Visitors to Pinellas County	3,966,955	4,077,416	2.8%	4,282,463	4,077,416	-4.8%
Direct Visitor Spending in Pinellas County	\$1,519,933,735	\$1,815,368,425	19.4%	\$1,477,177,587	\$1,815,368,425	22.9%
Total Economic Impact of Tourism to Pinellas County	\$2,496,821,297	\$3,053,492,119	22.3%	\$2,447,419,026	\$3,053,492,119	24.8%
Tax Revenues Generated for Pinellas County	\$100,244,986	\$116,834,816	16.5%	\$90,271,569	\$116,834,816	29.4%
Hotel Room Nights	1,703,351	1,747,912	2.6%	1,823,743	1,747,912	-4.2%
Visitor Industry Payroll	\$796,217,153	\$980,252,557	23.1%	\$785,923,505	\$980,252,557	24.7%
Jobs Supported	24,837	30,150	21.4%	24,710	30,150	22.0%

A photograph of four young adults (two men and two women) sitting on a sandy beach. They are all smiling and holding large, colorful tropical drinks with umbrellas and straws. The drinks are in white cups with a logo that says "SLOPPY JOE'S". The background shows a beach with some buildings in the distance. The image is overlaid with a semi-transparent dark grey rectangle containing white text.

Q2 2022

Point of Origin &
Demographic Profile

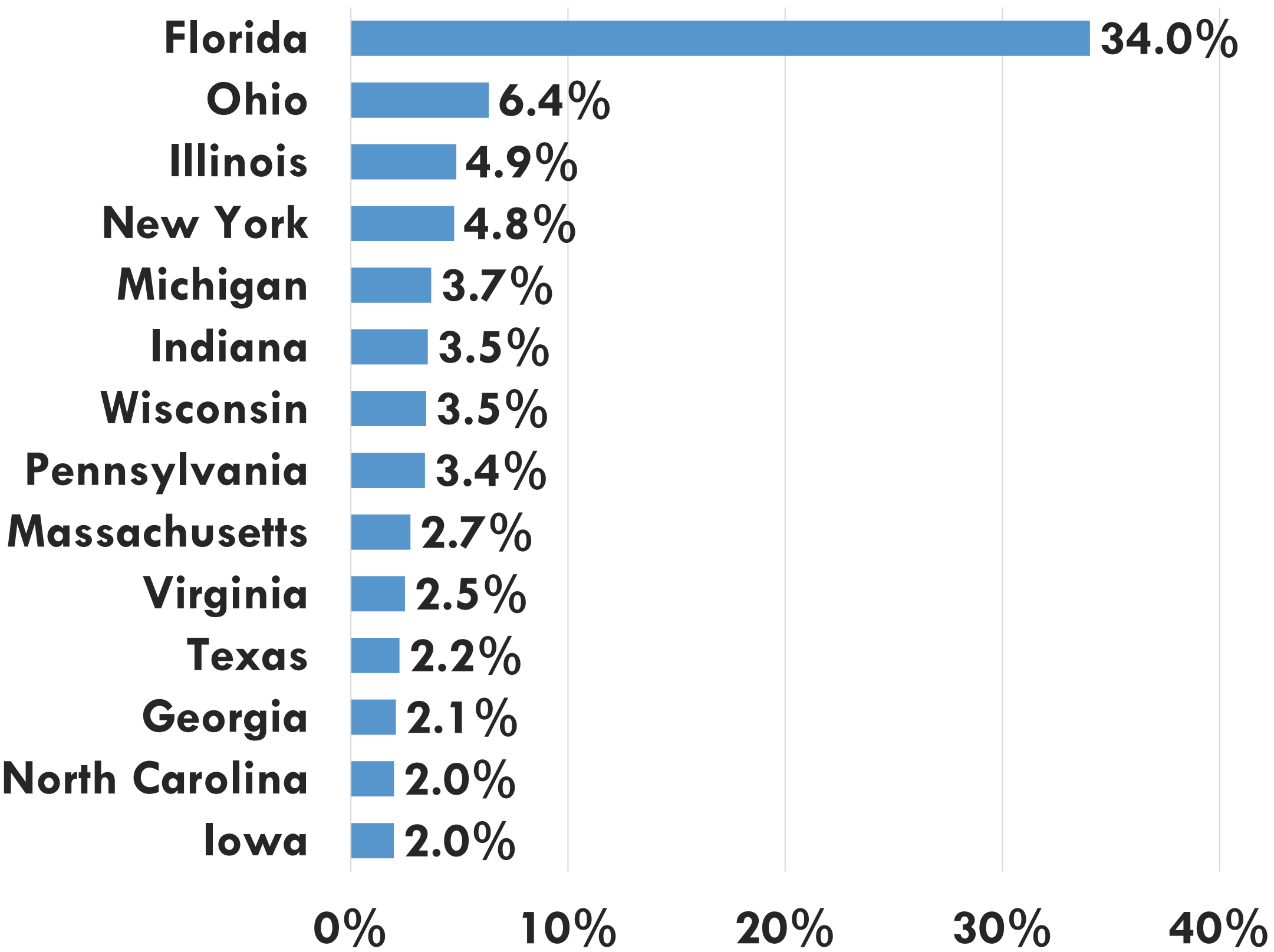
POINT OF ORIGIN: COUNTRY



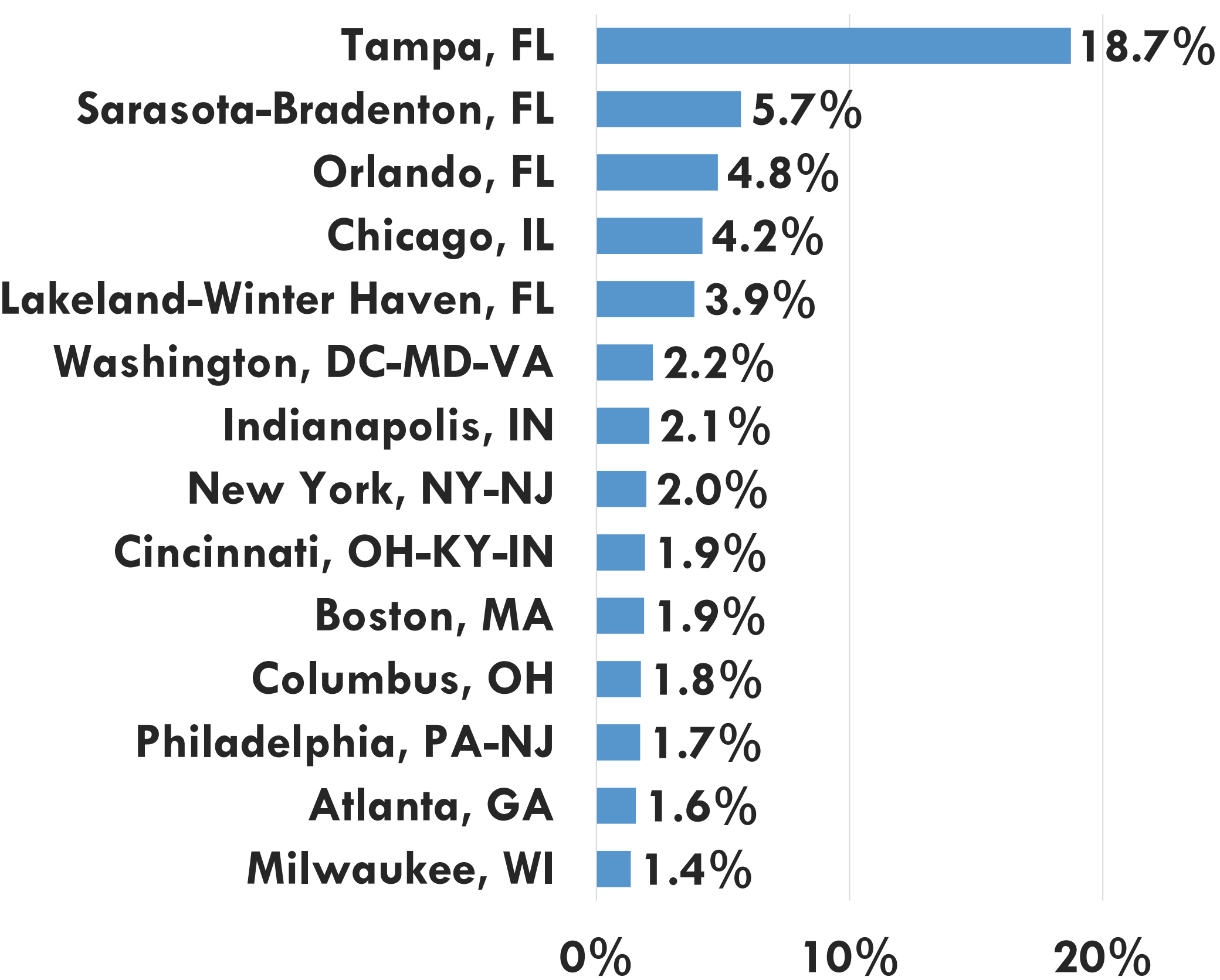
Question: In what country do you reside? Base: All Respondents.1,222 responses.

POINT OF ORIGIN: STATE & MSA (DOMESTIC VISITORS)

State of Origin



MSA



Question: What is your zip/postal code? Base: Domestic respondents. 1,101 responses.

DEMOGRAPHIC PROFILE



Average Age

47.5 years old



Household Income

\$110,906



Ethnicity

- Caucasian – 86.2%
- Latino / Hispanic – 5.4%
- Black/African-American – 3.2%



Marital Status

- Single: 21.4%
- Married/partnered: 68.4%
- Children under 18: 21.6%



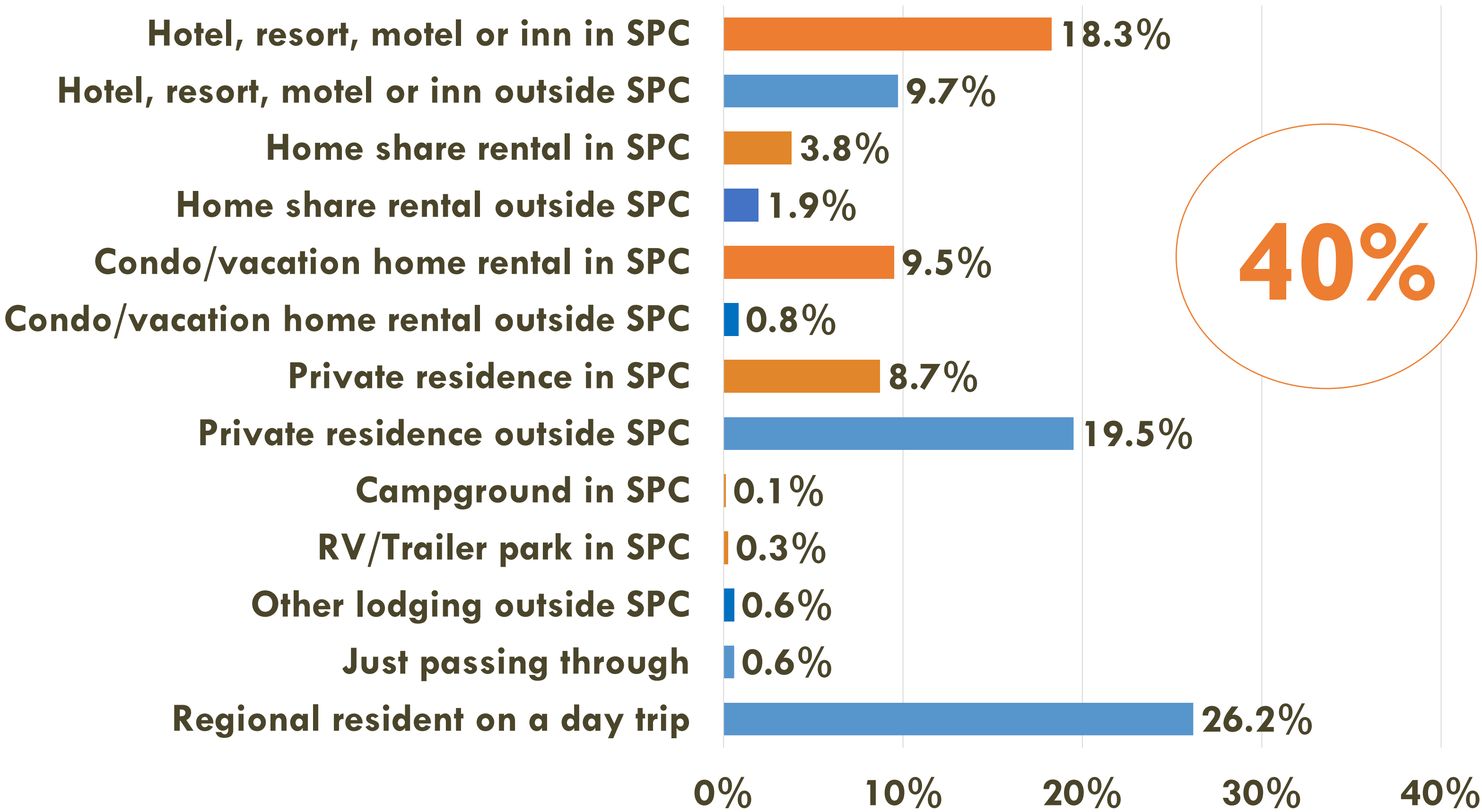
Orientation

- Heterosexual – 95.7%
- LGBTQ – 1.2%
- Other – 0.1%

A photograph of a modern building with a glass dome and palm trees at dusk. The building has a large, illuminated glass dome structure. Several tall palm trees are visible in the foreground and background. The sky is a deep blue. The text "Visitor Trip Details" is overlaid in white, with a vertical teal line to its left.

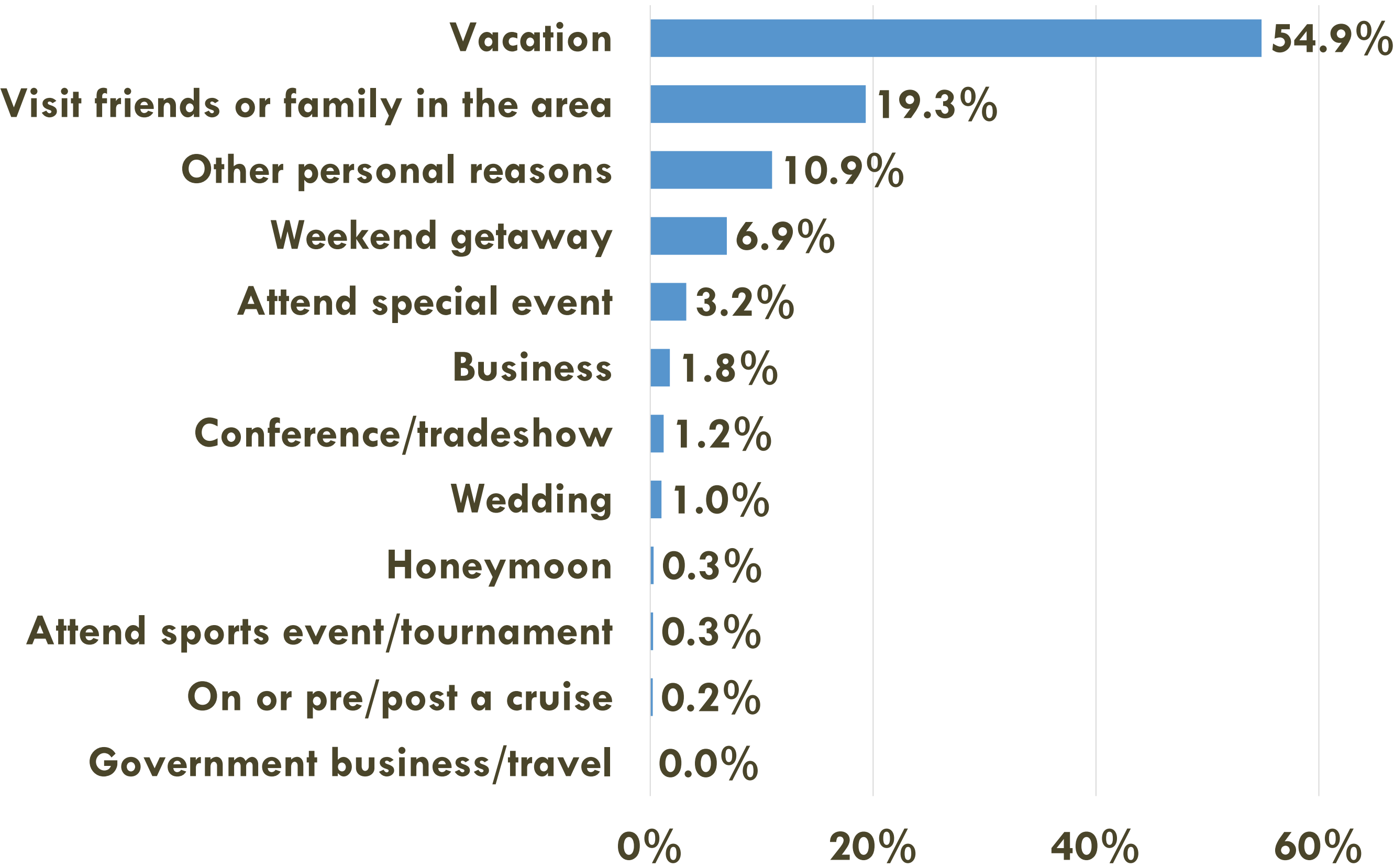
Visitor Trip Details

LODGING TYPE



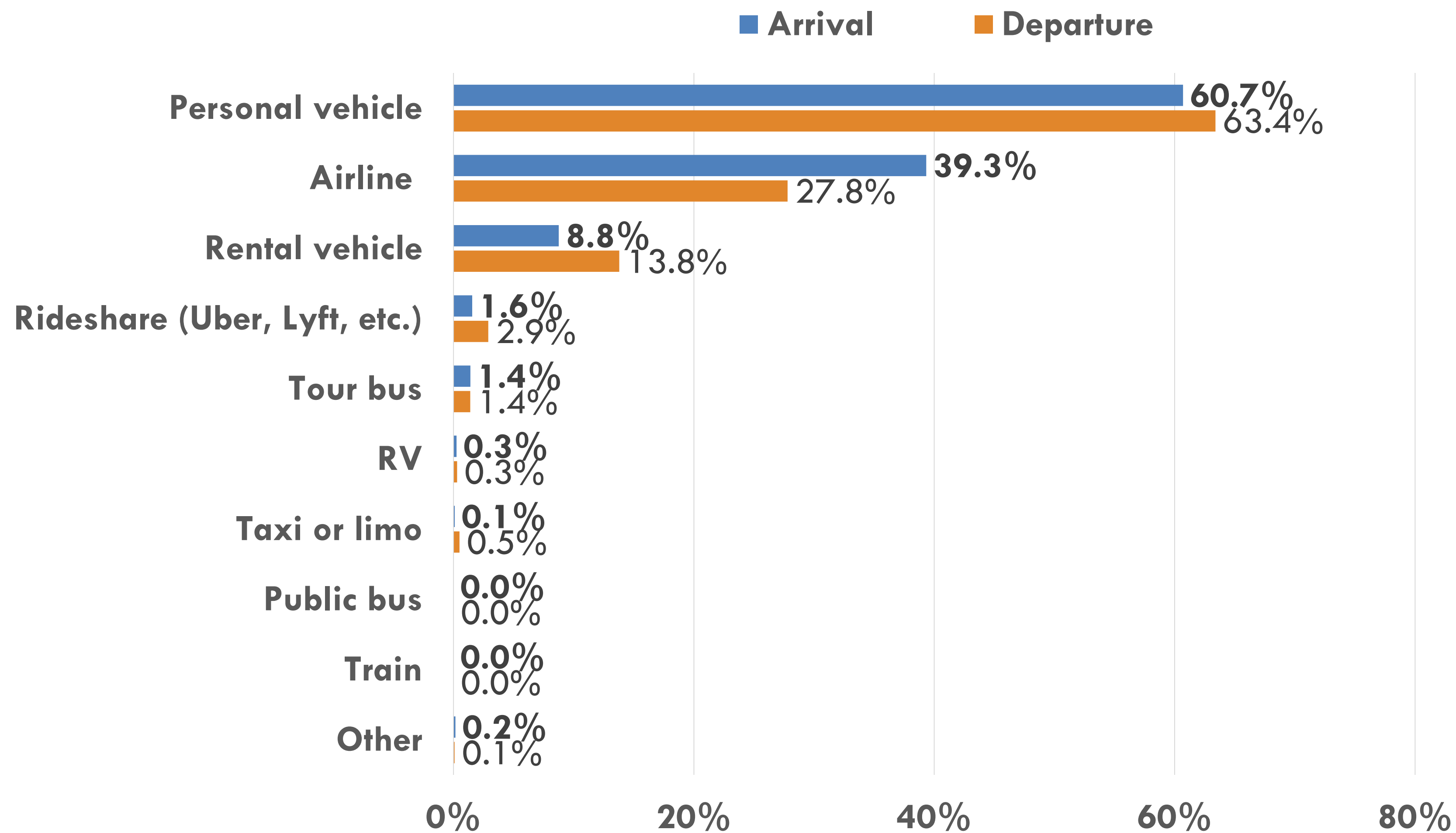
Question: Where are you staying overnight on this trip to the St. Pete/Clearwater area?
(Select one) Base: All Respondents. 1,228 responses.

PRIMARY REASON FOR VISIT



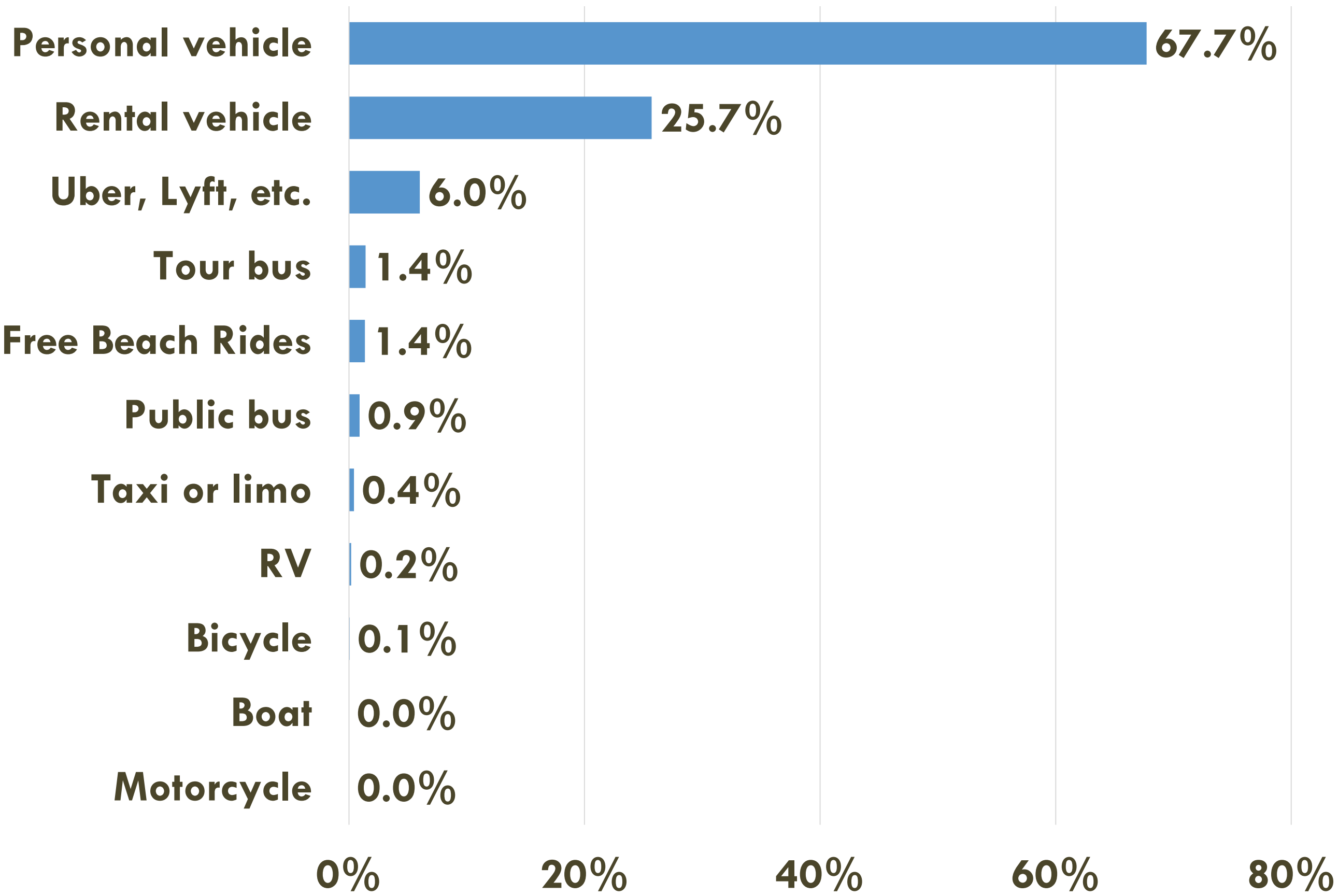
Question: What is your primary reason for visiting the St. Pete/Clearwater Area? (Select one)
Base: All Respondents. 1,195 responses.

METHOD OF ARRIVAL & DEPARTURE



Question: How did you arrive in the St. Pete/Clearwater area and how will you leave?
(Select all that apply) Base: All Respondents. 1,228 responses.

TRANSPORTATION USED IN-MARKET



Question: Which modes of transportation did you, or will you, use while in the St. Pete/Clearwater area? (Select all that apply) Base: All Respondents. 1,224 responses.

TRAVEL PARTY SIZE & COMPOSITION

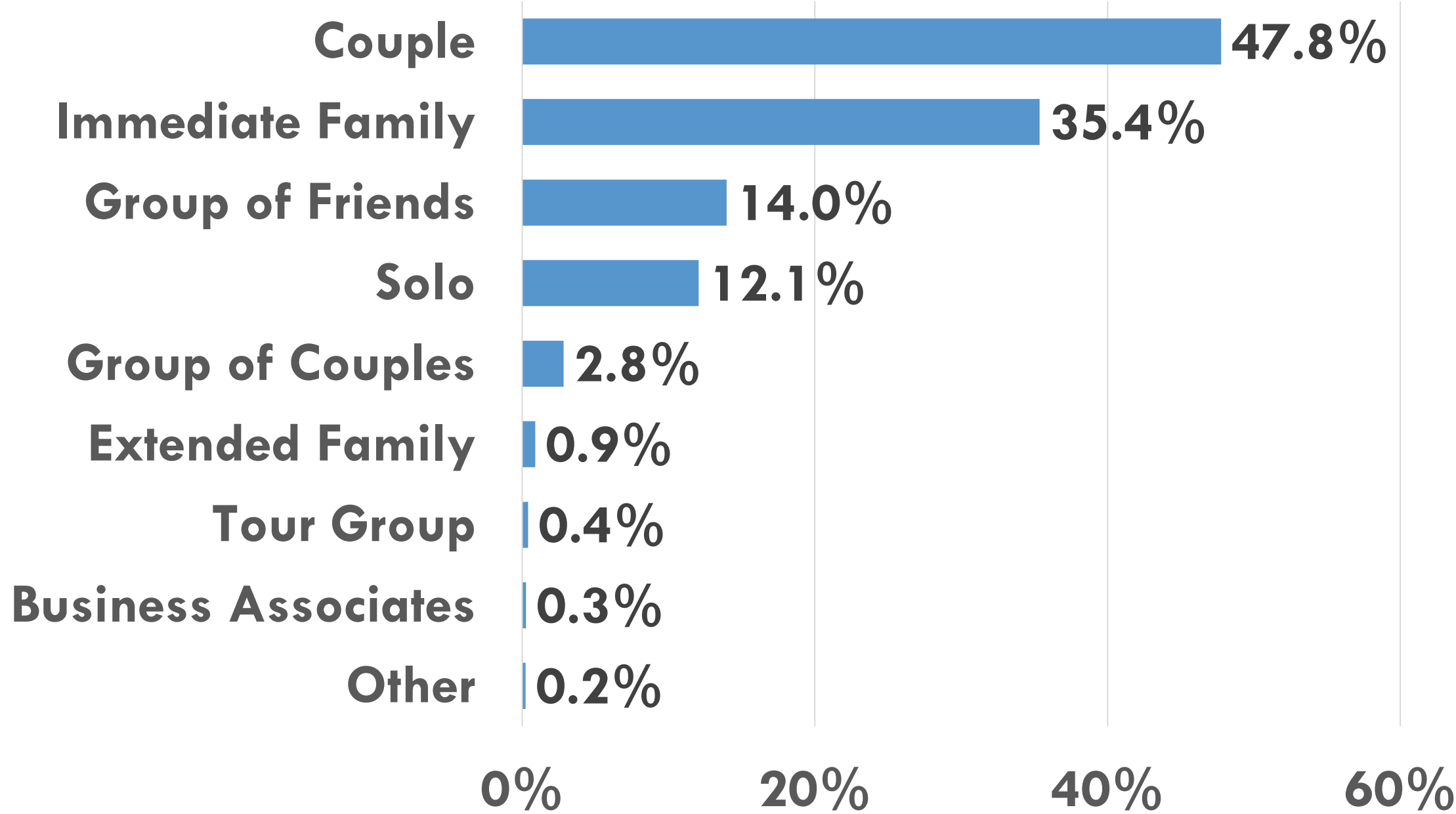
Travel Party Size

	Mean
Male adults (18 yrs. +)	0.9
Female adults (18 yrs. +)	1.4
Male children (0 to 17 yrs.)	0.2
Female children (0 to 17 yrs.)	0.2
Average Travel Party Size	2.7
Percent with children in party	21.6%

Question: How many people of each type are in your immediate travel party, including yourself?

Base: All Respondents. 1,228 responses.

Travel Party Composition

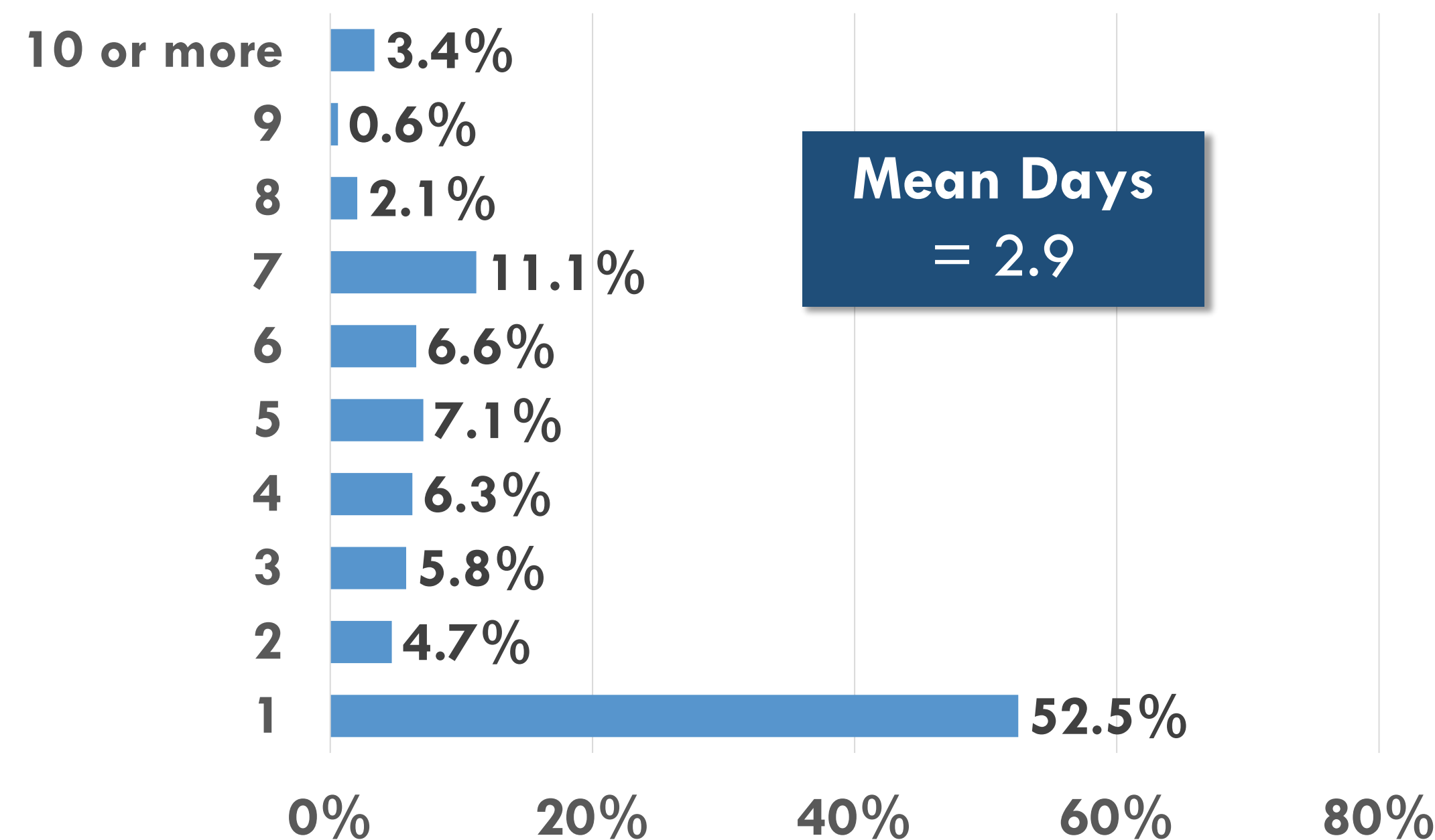


Question: Which best describes your travel group on this trip? Are you...? (Select all that apply)

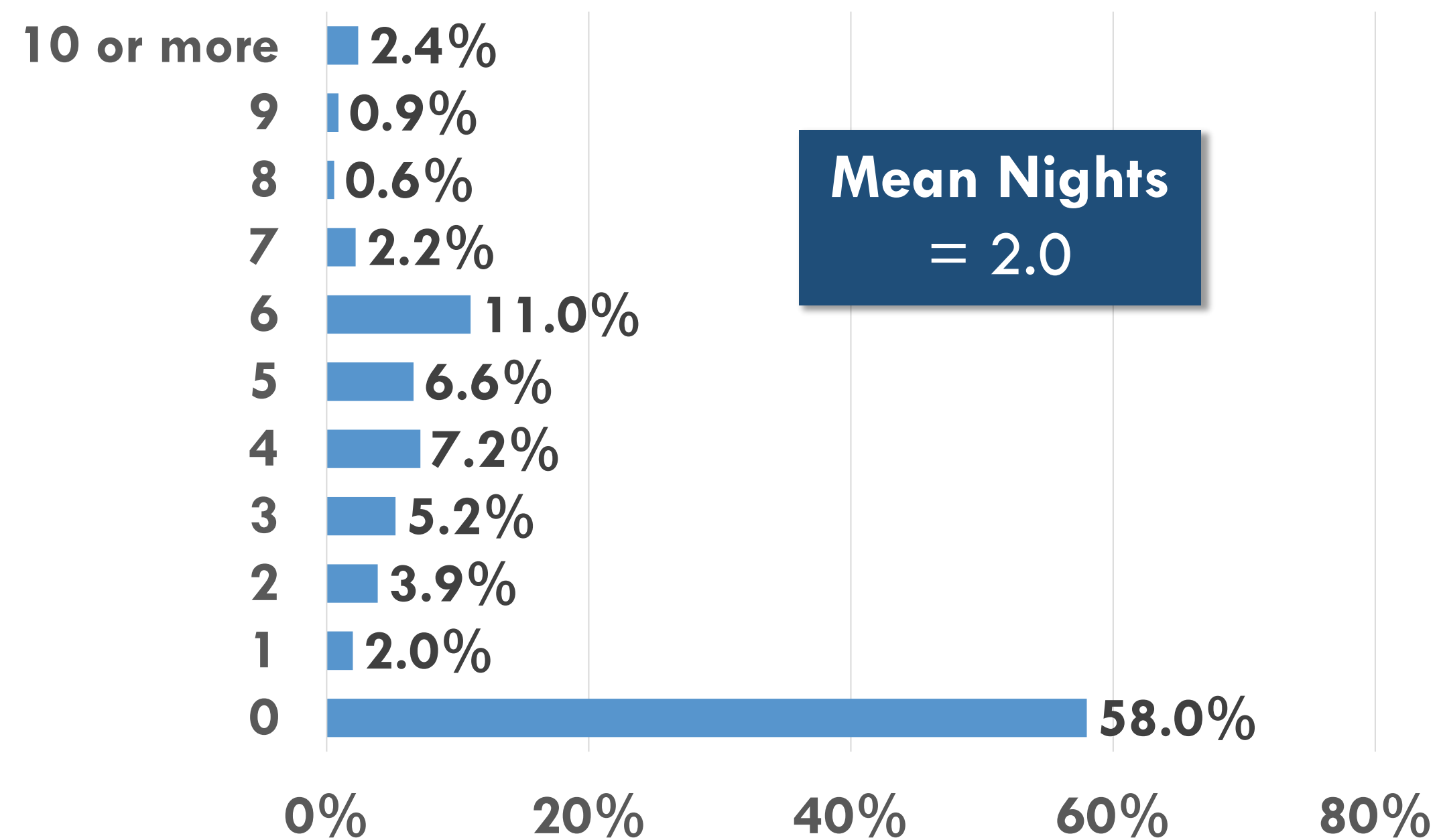
Base: All Respondents. 1,227 responses.

DAYS & NIGHTS IN ST. PETE/CLEARWATER

Days in Market

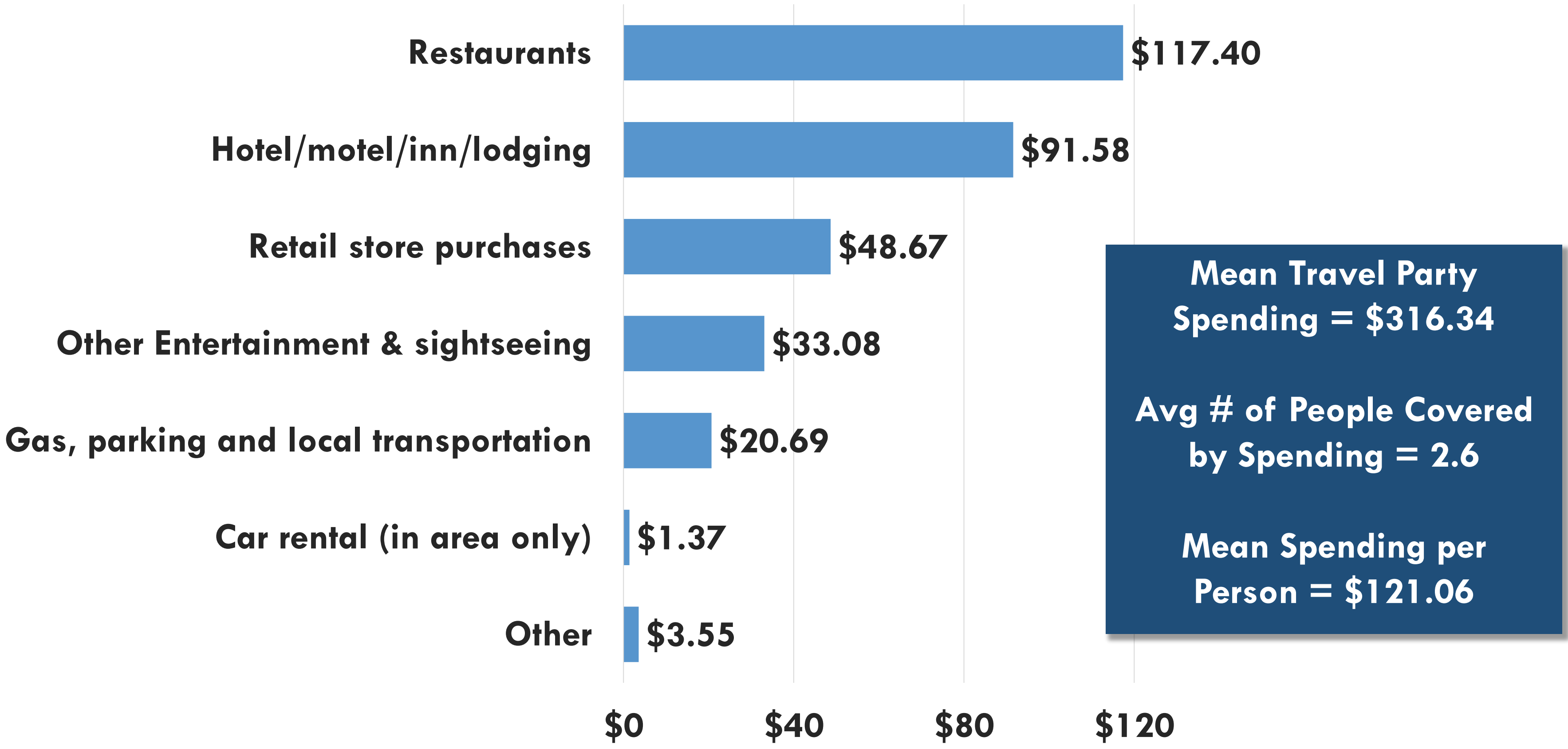


Nights in Market



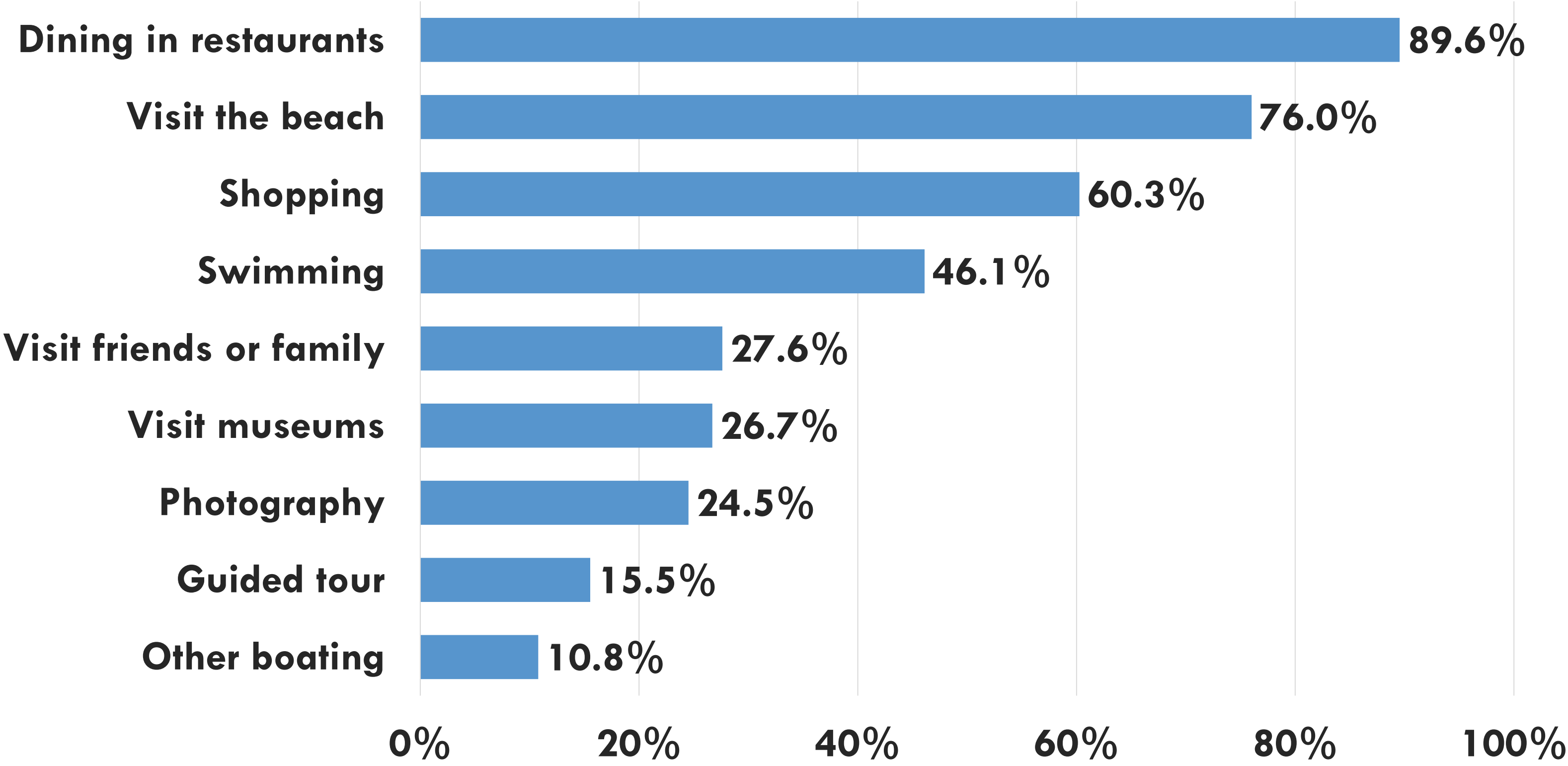
Question: How many total days and nights did you, or will you, stay in the St. Pete/Clearwater area on this trip? Base: All Respondents. 1,228 responses.

DAILY SPENDING IN-MARKET



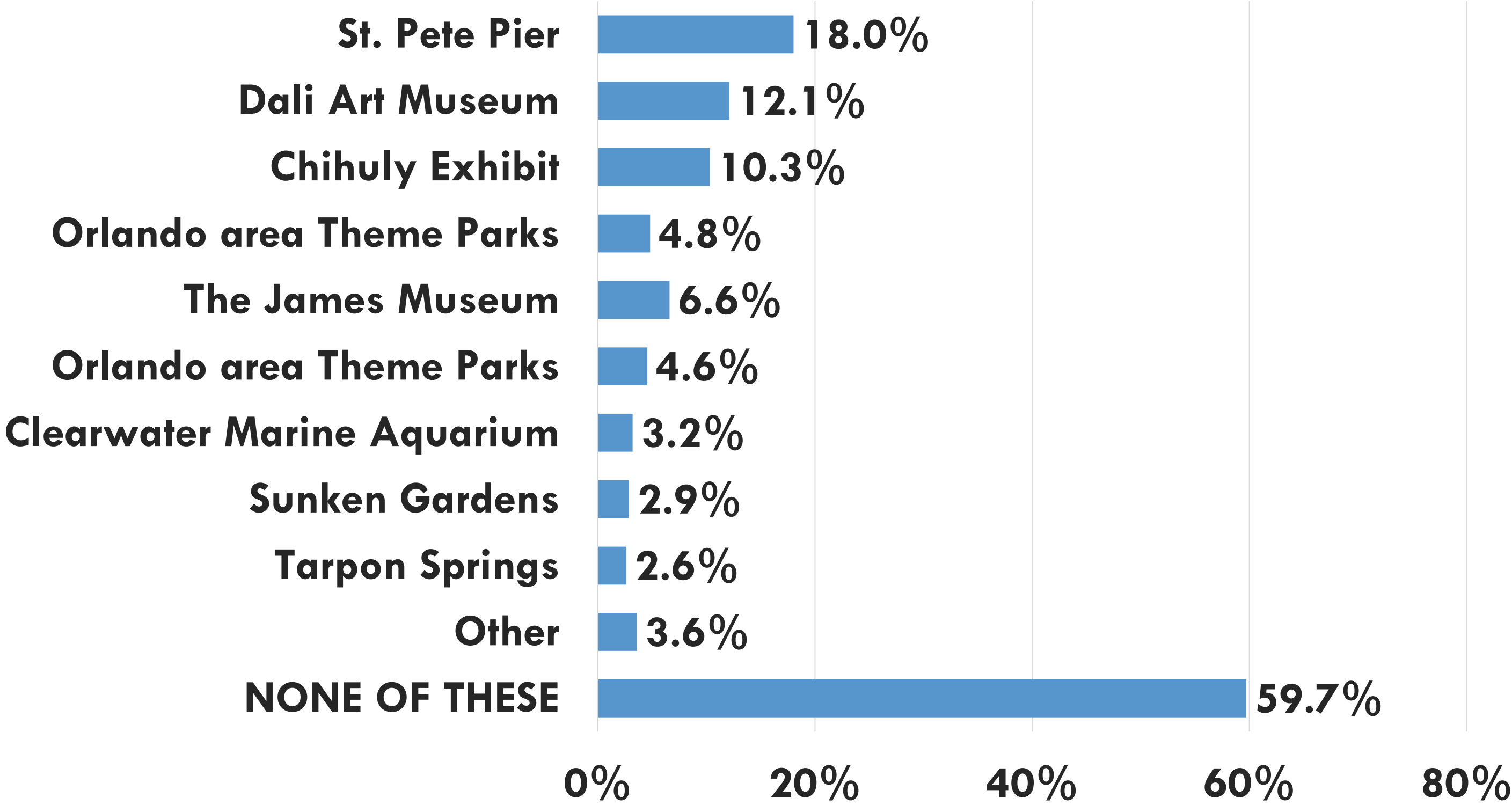
Question: PER DAY, approximately how much will you spend on each of the following while in the St. Pete/Clearwater area? Base: All Respondents. 1,189 responses.

TRIP ACTIVITIES



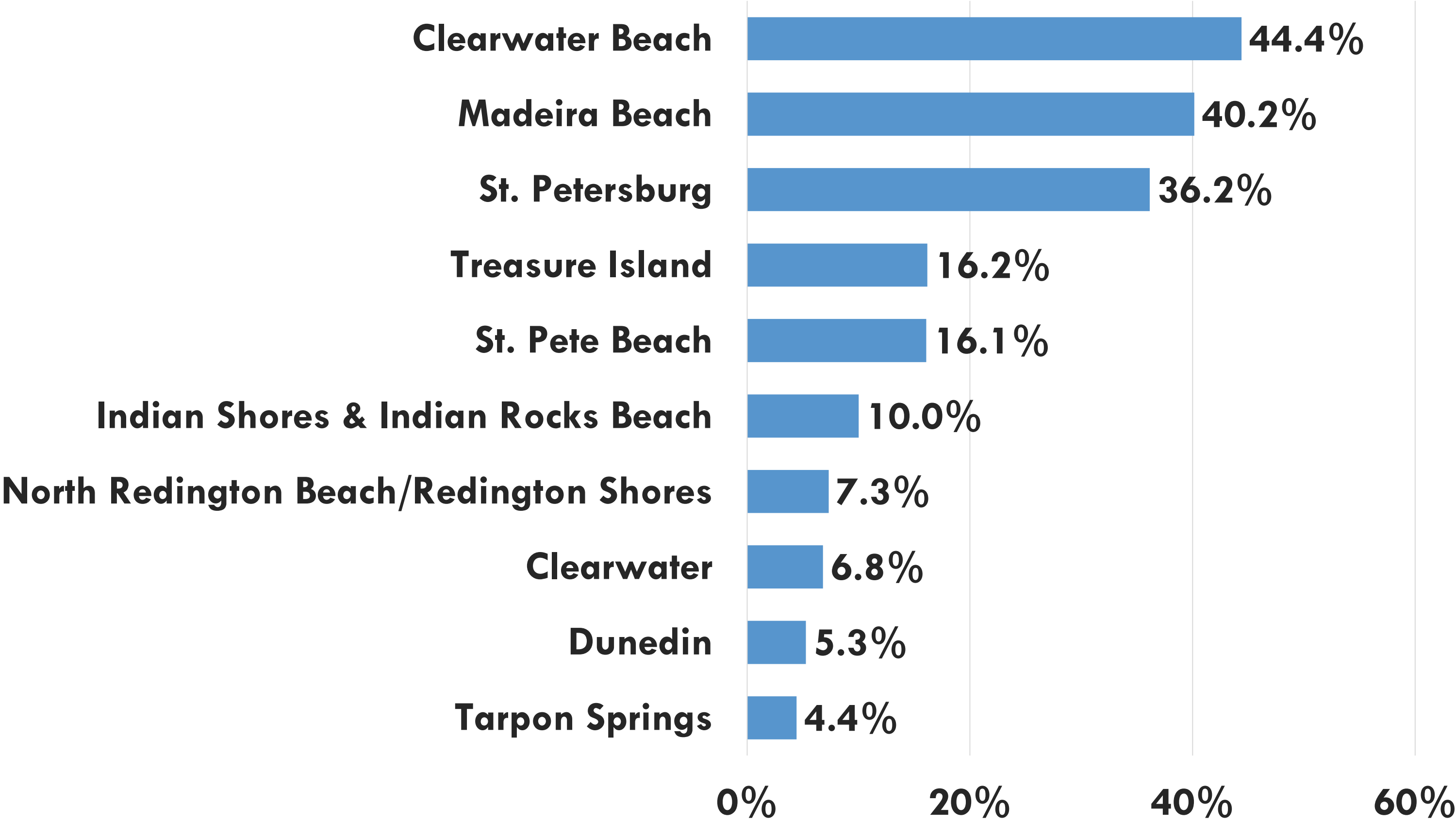
Question: Which of these activities did you, or will you, participate in while in the St. Pete/Clearwater area? (Select all that apply) Base: All Respondents. 1,228 responses.

ATTRACTIONS VISITED



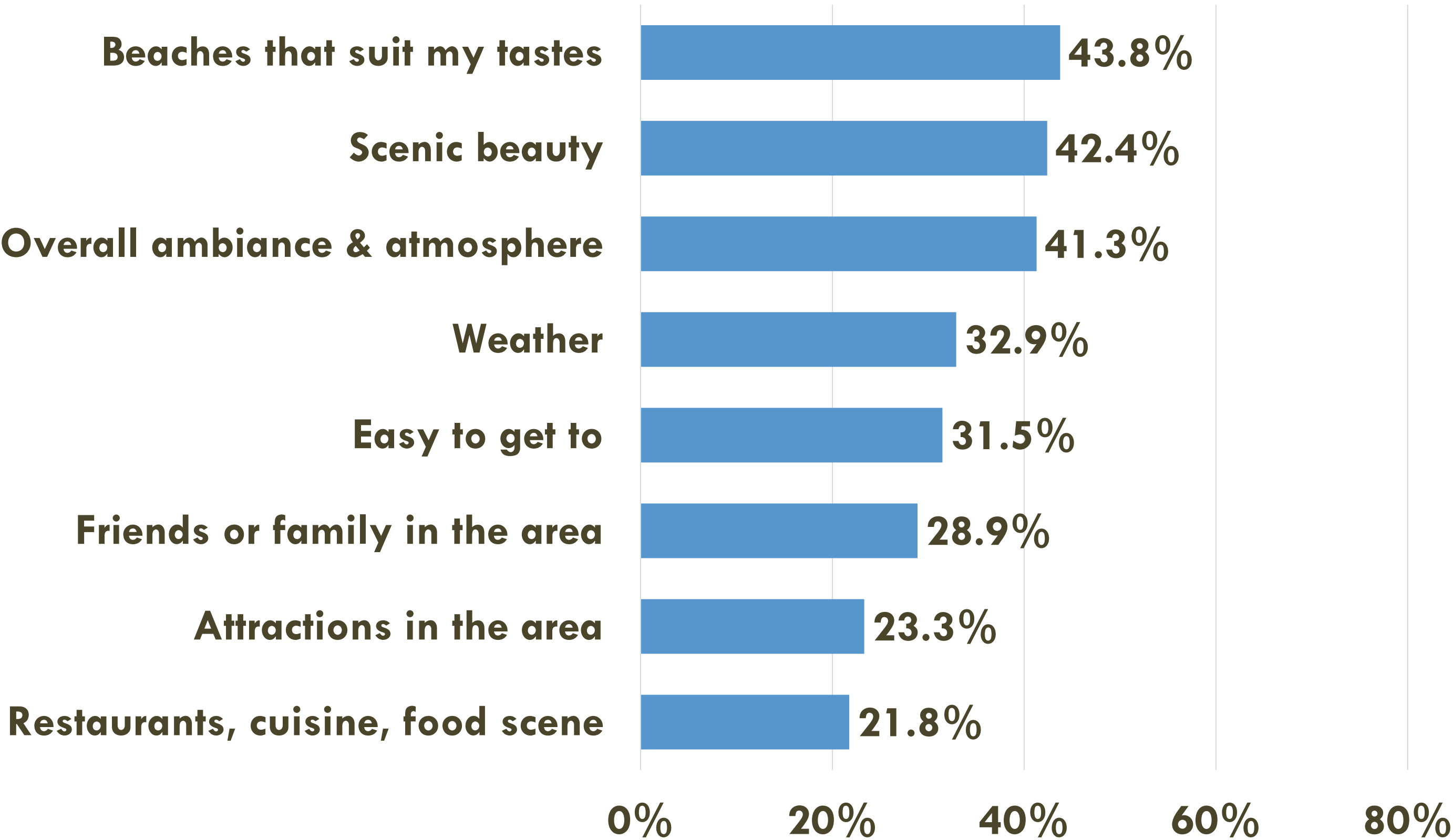
Question: Which of these attractions did you (or will you) visit while on this trip? (Select all that apply) Base: All Respondents. 1,220 responses.

TOP COMMUNITIES VISITED



Question: Which of the following communities in the St. Pete/Clearwater area did you visit?
(Show list. Select all that apply) Base: All Respondents. 1,225 responses.

IMPORTANT FACTORS TO DESTINATION DECISION



Question: Which of the following were IMPORTANT to your decision to take this trip to the St. Pete/Clearwater area? (Select all that apply) Base: All Respondents. 1,193 responses.

A photograph of three dogs sitting at a wooden table. On the left is a brown and white bulldog with its tongue out, wearing a purple collar. In the middle is a white and brown bulldog with its tongue out, wearing a patterned bandana. On the right is a brown and white beagle with its mouth open, wearing a black harness. In front of each dog is a yellow paper cup with a logo. The background features a wall with a large red heart and a white cloud graphic. A teal vertical line is positioned to the left of the text.

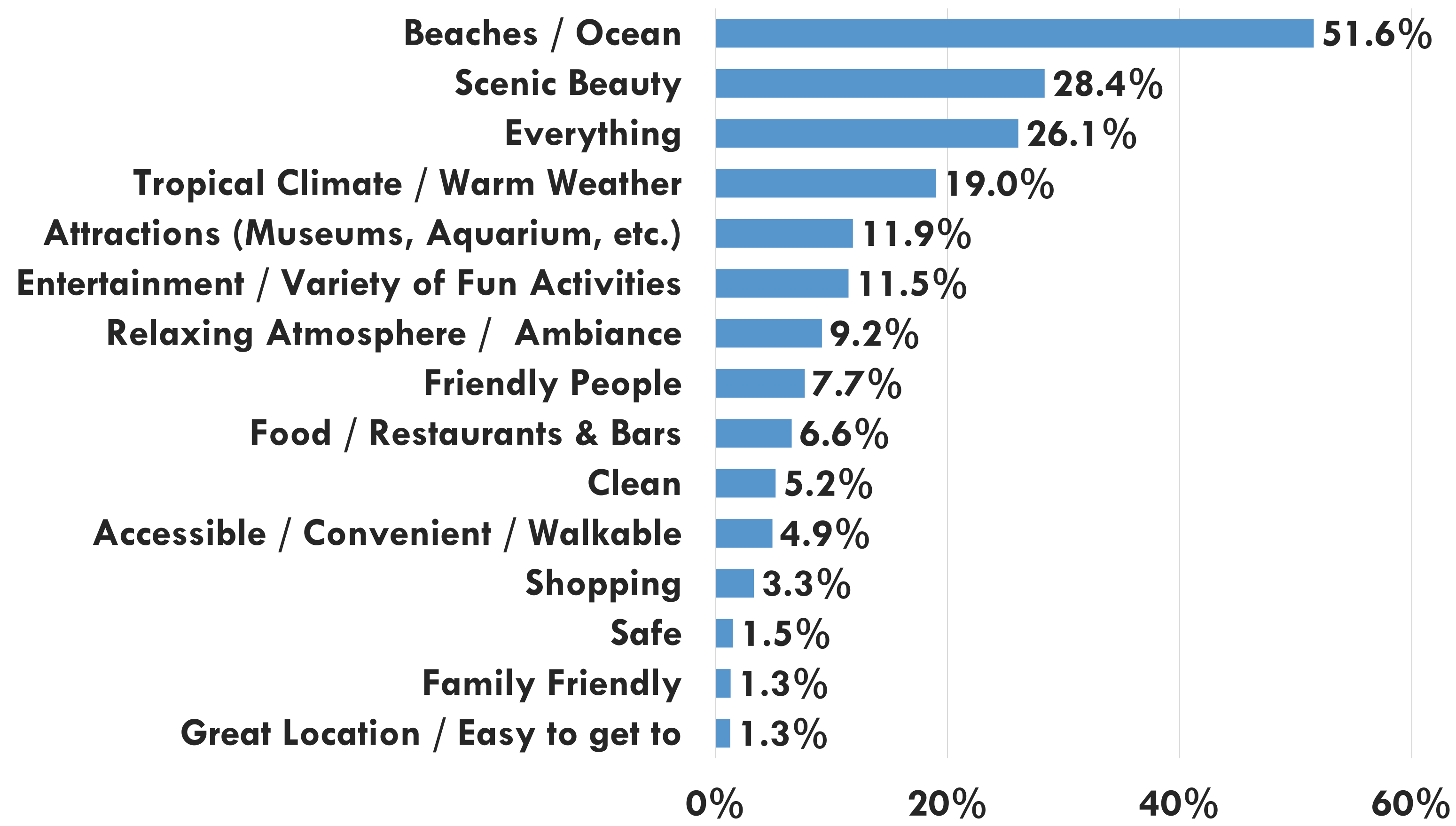
Visitor Satisfaction

OVERALL SATISFACTION



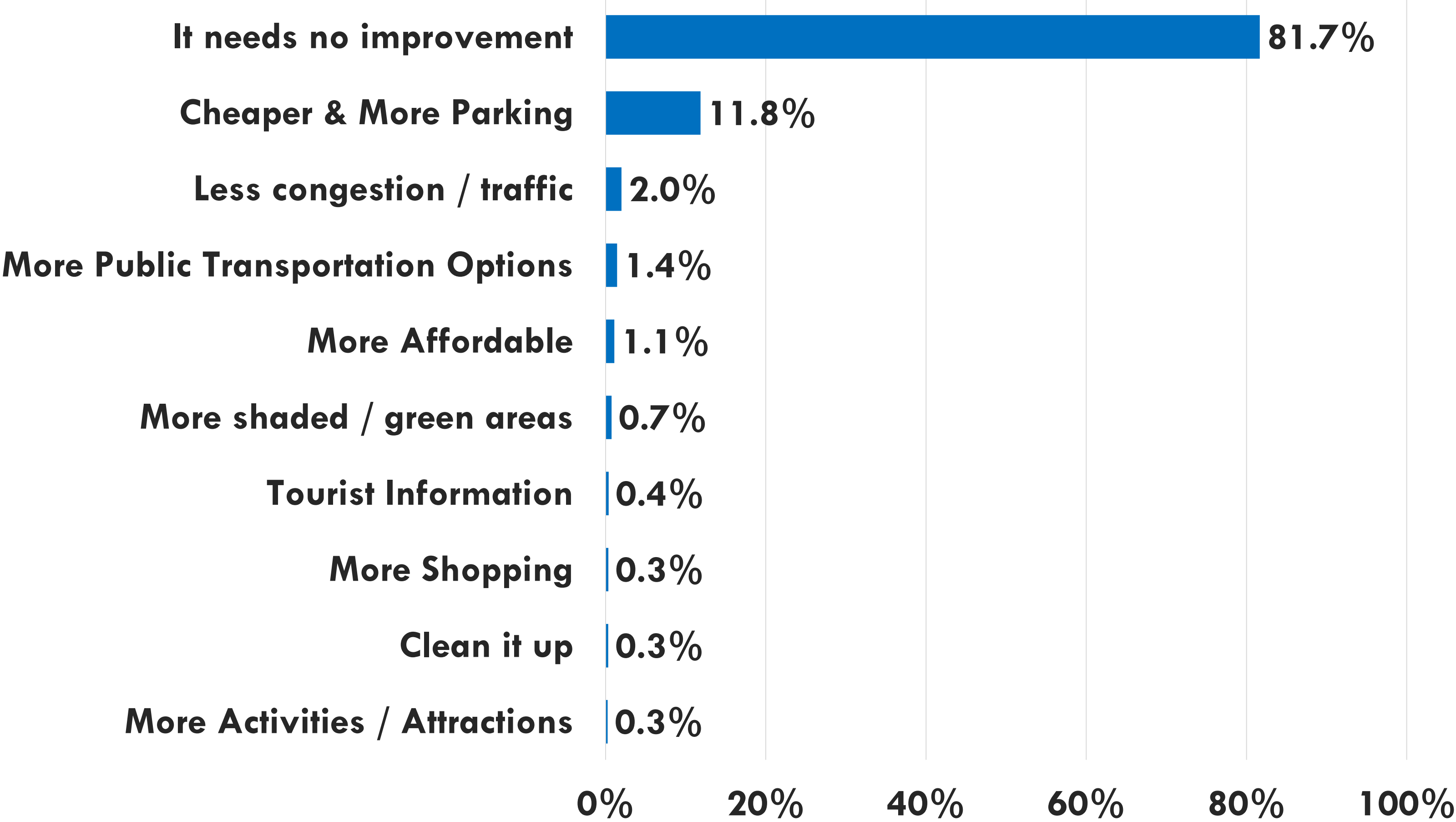
Question: How satisfied are you with your experience in the St. Pete/Clearwater area on this trip? (Select one) Base: All Respondents. 1,222 responses.

MOST LIKED ASPECTS OF ST. PETE/CLEARWATER



Question: What do you like most about the St. Pete/Clearwater area?
Base: All Respondents. 1,225 responses.

ATTRACTIONS OR SERVICES THAT WOULD ENHANCE THE DESTINATION EXPERIENCE



Question: In your opinion, what services or additional attractions would most enhance your experience in the St. Pete/Clearwater Area? Base: All Respondents. 1,207 responses.

LIKELIHOOD TO RECOMMEND & RETURN

Likelihood to Recommend St. Pete/Clearwater Area



Question: How likely are you to recommend the St. Pete/Clearwater area as a place to visit to other travelers? Please use a 10-point scale where 1 represents “Definitely will NOT recommend” and 10 represents “Certain to recommend.” Base: All Respondents. 1, 217 responses.

Likelihood to Return to St. Pete/Clearwater Area



Question: How likely are you to return to the St. Pete/Clearwater area? Please use a 10-point scale where 1 represents “Definitely will NOT return” and 10 represents “Certain to return.” Base: All Respondents. 1,203 responses.