

Future Partners



Visit St. Pete/Clearwater
Visitor Profile &
Economic Impact Study

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Background & Overview

The overarching goal of this research is to create detailed profiles of Pinellas Co. visitors based upon key areas of interest, including travel planning resources, trip characteristics (e.g. reason for visiting, length of stay, place of stay, etc.), travel party composition, activities/attractions/areas visited, spending, satisfaction, and demographics.

This report represents the Q4 2023 (October - December) findings for the visitor profile research.



Methodology & Analysis

In total, 1,090 completed surveys from Pinellas Co. visitors were collected from October through December 2023. In order to be considered a visitor, respondents had to reside outside of Pinellas Co. The survey questionnaire was administered to persons 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

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

Economic Impact Analysis

Economic Impact Estimates - Q4 2023

Visitors to Pinellas Co.



3.4 Million



Hotel Room Nights

1.4 Million

Direct Visitor Spending



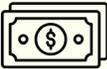
\$1.5 Billion



Tourism Industry Payroll

\$746 Million

Total Economic Impact



\$2.4 Billion



Jobs Supported

Over 22,000

Tax Revenues



\$88.5 Million

Economic Impact Estimates

The visitor volume to St. Pete/Clearwater in Q4 2023 (October - December) is estimated to total 3,387,120. Additionally, it is estimated that visitors to the area during this timeframe generated almost \$1.5 billion in direct spending and almost \$90 million in tax revenue for Pinellas Co.

	Q4 2022 (Jan – Mar)	Q1 2023 (Jan – Mar)	Q2 2023 (Apr – Jun)	Q3 2023 (Jul – Sep)	Q4 2023 (Oct – Dec)
Visitors to Pinellas Co.	3,434,064	4,446,523	4,225,362	3,751,685	3,387,120
Direct Visitor Spending in Pinellas Co.	\$1,497,959,201	\$2,020,069,440	\$1,656,120,785	\$1,425,037,162	\$1,466,267,870
Total Economic Impact of Tourism to Pinellas Co.	\$2,495,167,641	\$3,318,830,071	\$2,782,000,040	\$2,340,821,574	\$2,346,945,485
Tax Revenue Generated for Pinellas Co.	\$93,546,346	\$131,990,815	\$109,694,932	\$88,790,118	\$88,506,846
Hotel Room Nights	1,606,362	1,850,307	1,704,274	1,505,245	1,443,568
Tourism Industry Payroll	\$786,437,547	\$1,047,151,186	\$883,044,582	\$744,509,598	\$745,503,967
Jobs Supported	24,130	31,883	26,964	22,837	22,854

Economic Impact: Definitions

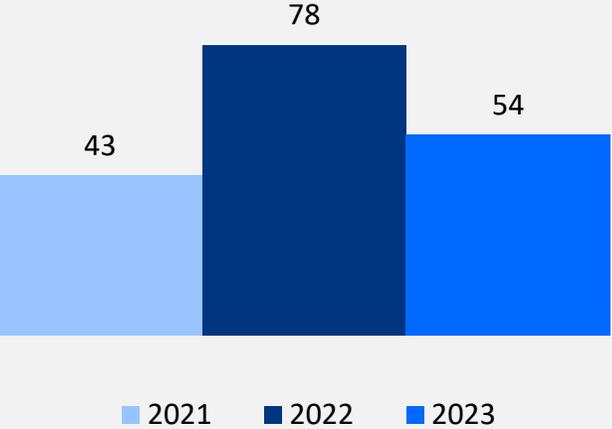
The following definitions, as they relate to economic impact, are used throughout this report:

- **Direct Visitor Spending:** The injection of money into the local economy when a visitor purchases any good/service inside Pinellas Co.
- **Total Economic Impact:** The total change in economic activity in Pinellas Co. generated by direct spending. This includes direct visitor spending, as well as its induced and indirect effects in the county.
- **Tax Revenues Generated:** Tax revenues flowing to government coffers as a result of direct visitor spending.
- **Hotel Room Nights:** The estimated number of hotel room nights in Pinellas Co. generated by visitors.
- **Indirect Effects:** Changes in inter-industry transactions when supplying industries respond to increased demands from the directly affected industries (i.e., impacts from non-wage expenditures).
- **Induced Effects:** Changes in spending that result from income changes in the directly and indirectly affected industry sectors (i.e., impacts from wage expenditures; the subsequent round of spending made by employees of companies that incur direct and indirect expenditures).
- **Hotel Guests:** Visitors who stayed overnight in a Pinellas Co. hotel, motel, resort, or inn.
- **Visiting Friends/Relatives (VFRs):** Visitors who stayed overnight in the private residence of a friend/family member who lives in Pinellas Co.
- **Vacation Rental Guests:** Visitors who stayed overnight in a condo, vacation home or other private home rental in Pinellas Co.
- **Daytrip Visitors (regional):** Visitors who came for the day and reside in the regional area surrounding Pinellas Co.
- **Daytrip Visitors (travelers):** Visitors who came for the day, stayed overnight outside Pinellas Co. and reside outside the region.
- **Peer-to-Peer Home Share Guests:** Visitors who stayed overnight in a home share rental (i.e., AirBnB, VRBO, etc.) in Pinellas Co.
- **Other Guests:** Pinellas Co. visitors who stayed overnight in other types of lodging.

Visitor Summary: Year-over-Year

Visitor Summary: Year-over-Year Comparison for Q4 2023

Average Days Between Decision to Visit & Arrival



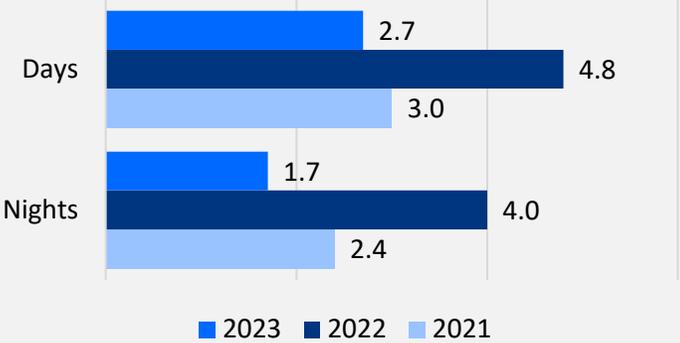
Average Daily Spending Per Travel Party



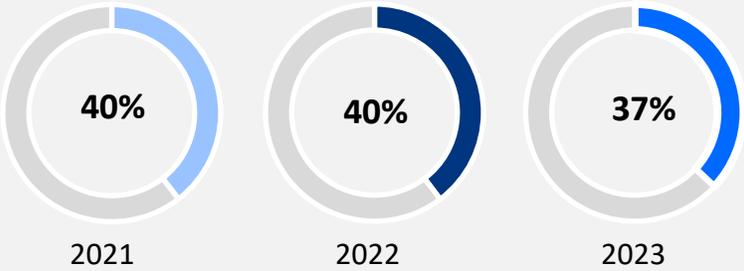
Travel Party Size



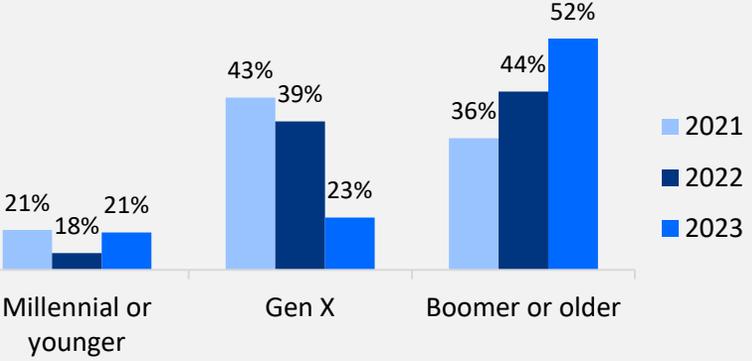
Average Days & Nights



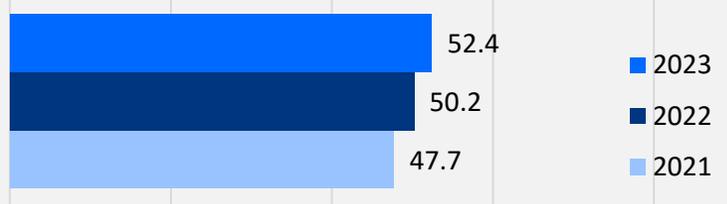
Percent Staying Overnight



Generation



Average Age



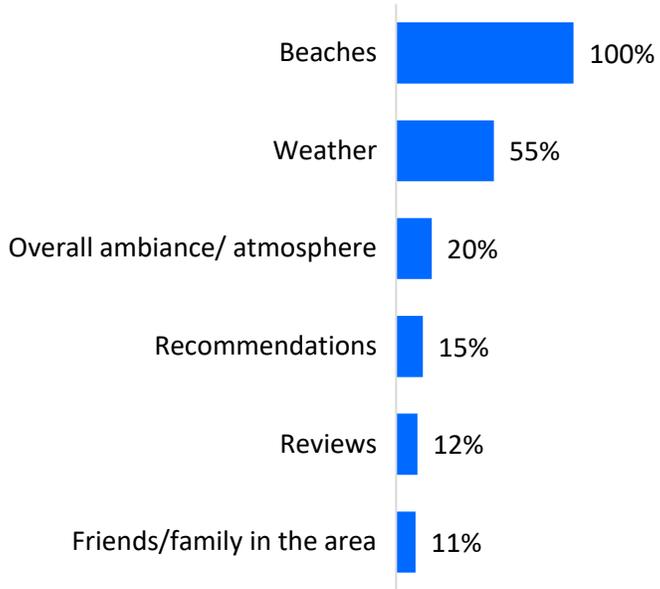
Average Household Income



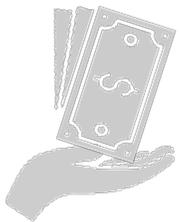
Infographic: Traveler Segments

Beach-goer

Important Factors for Destination Selection



Average Daily Spending Per Person



\$370

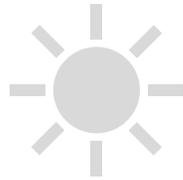
Travel Party Size



2.5

10% traveled with children

Average Length of Stay



6.0 days

Top Activities



Visiting the beach - 100%



Dining out - 92%

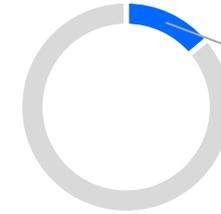


Shopping - 80%



Swimming - 69%

International Visitation



Origin States



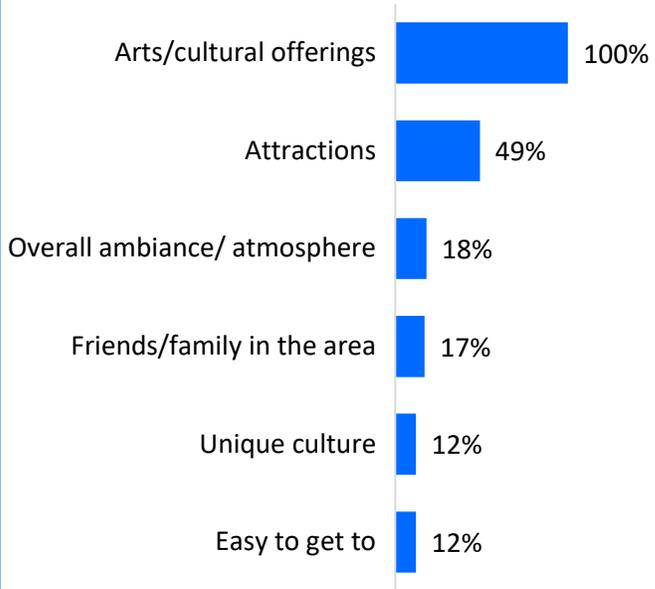
Communities Visited



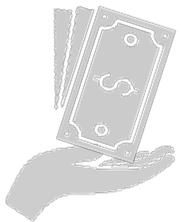
Madeira Beach	64%
St. Petersburg	49%
Clearwater Beach	29%
St. Pete Beach	29%
Treasure Island	21%

Arts & Culture Visitor

Important Factors for Destination Selection



Average Daily Spending Per Person



\$226

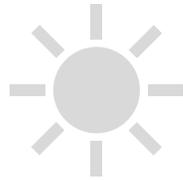
Travel Party Size



2.4

3% traveled with children

Average Length of Stay



2.0 days

Top Activities



Visiting museums - 86%



Dining out - 63%

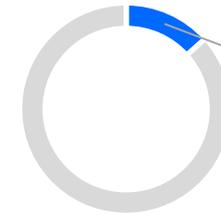


Shopping - 29%



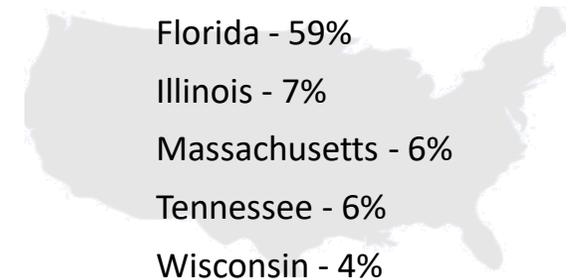
Visiting the beach - 26%

International Visitation



International
13%

Origin States



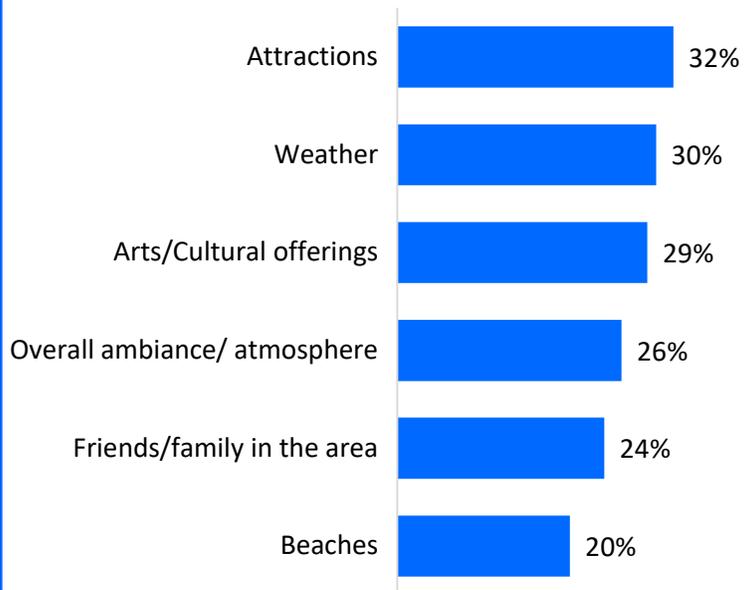
Communities Visited



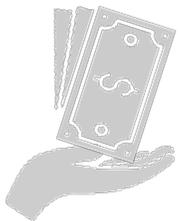
St. Petersburg	100%
St. Pete Beach	9%
Clearwater Beach	6%
Madeira Beach	4%
Treasure Island	4%

Affluent Traveler

Important Factors for Destination Selection



Average Daily Spending Per Person



\$386

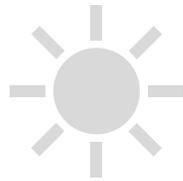
Travel Party Size



2.6

9% traveled with children

Average Length of Stay



3.1 days

Top Activities



Dining out - 68%



Visiting museums - 60%

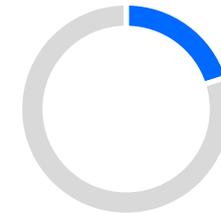


Shopping - 45%



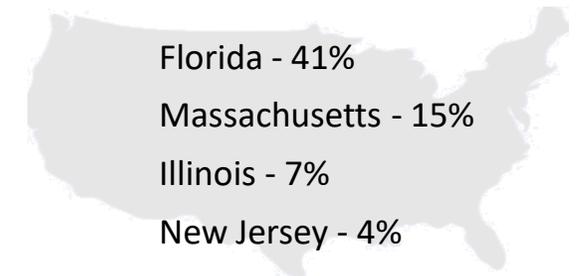
Visiting the beach - 38%

International Visitation



International
20%

Origin States



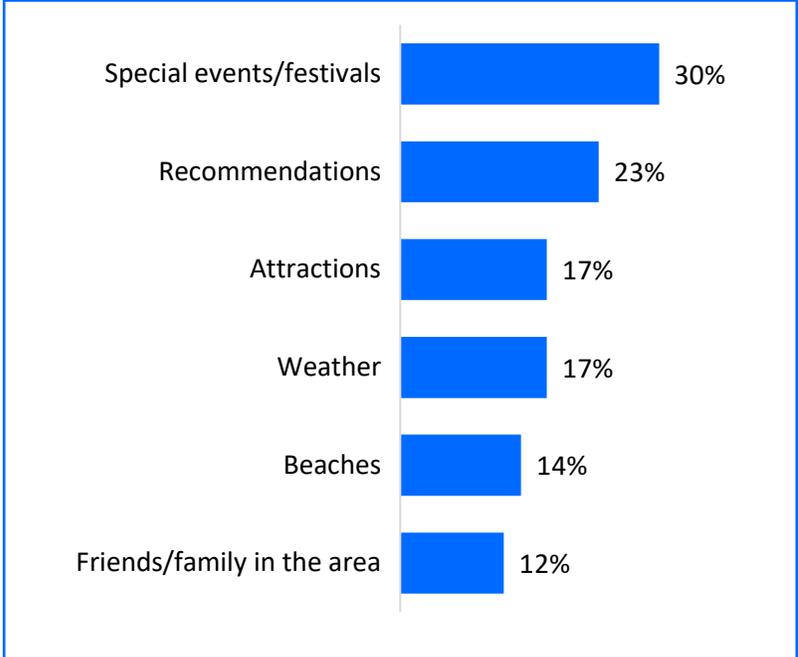
Communities Visited



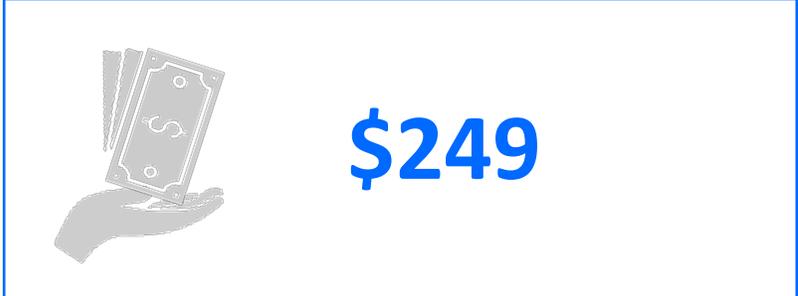
St. Petersburg	76%
St. Pete Beach	17%
Clearwater Beach	14%
Dunedin	13%
Madeira Beach	8%

Family Traveler

Important Factors for Destination Selection



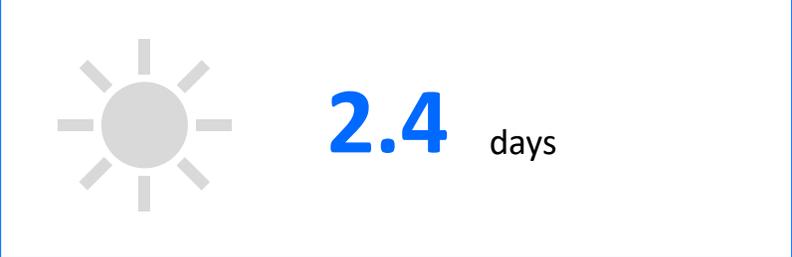
Average Daily Spending Per Person



Travel Party Size



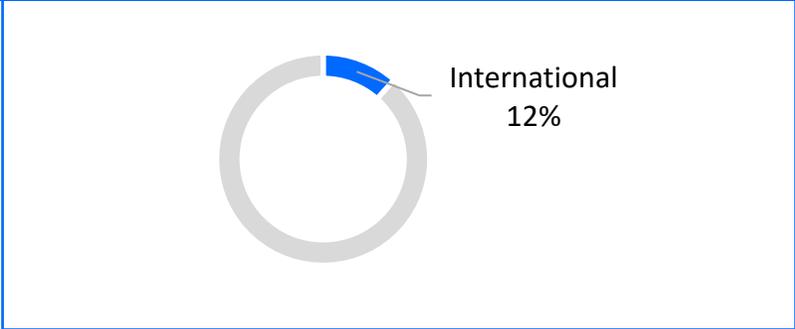
Average Length of Stay



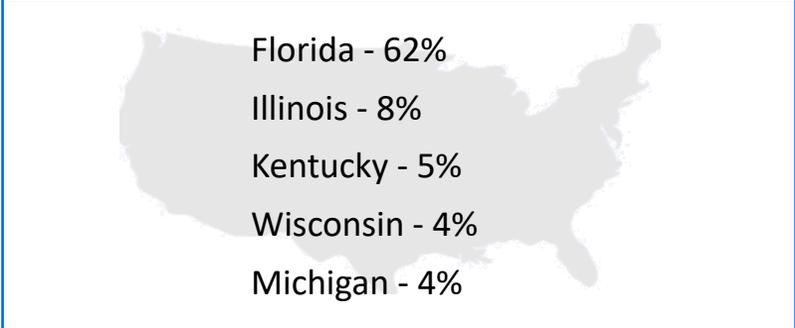
Top Activities

- Dining out - 78%
- Festival/ Event - 51%
- Shopping - 47%
- Visiting the beach - 47%

International Visitation



Origin States



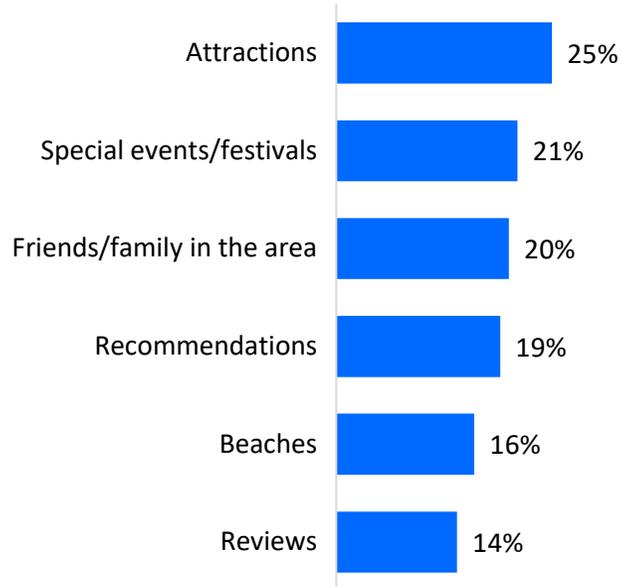
Communities Visited



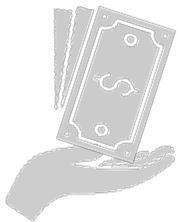
Infographic: Generations

Millennial Travelers

Important Factors for Destination Selection



Average Daily Spending Per Person



\$256

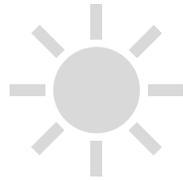
Travel Party Size



2.3

10% traveled with children

Average Length of Stay



2.5 days

Top Activities



Dining out - 84%



Shopping - 50%

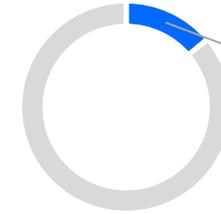


Visiting the beach - 38%



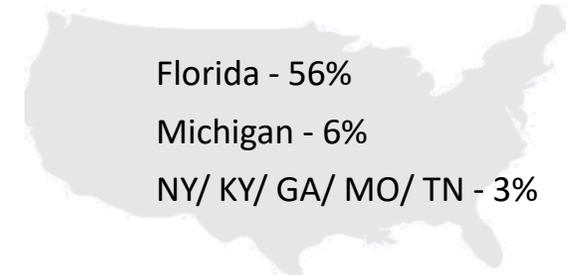
Museums - 37%

International Visitation



International
14%

Origin States



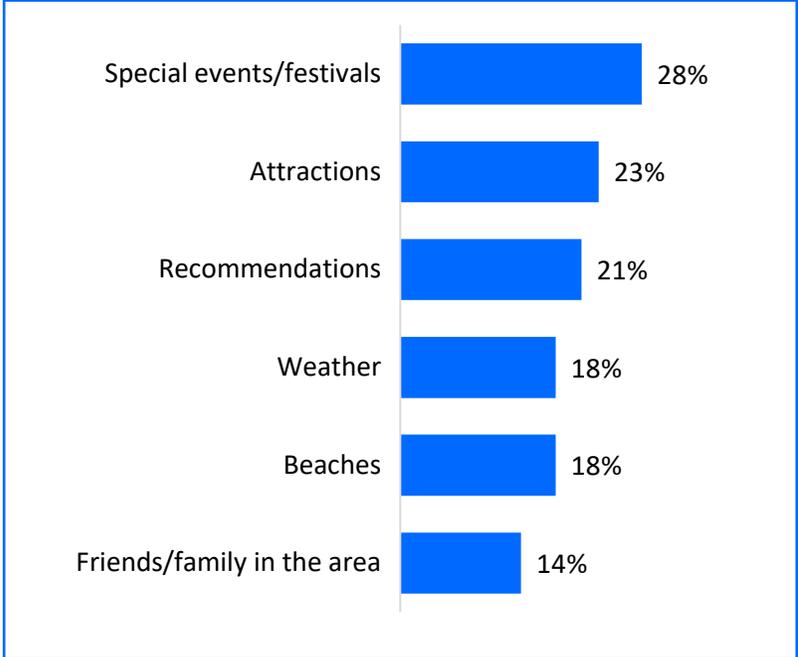
Communities Visited



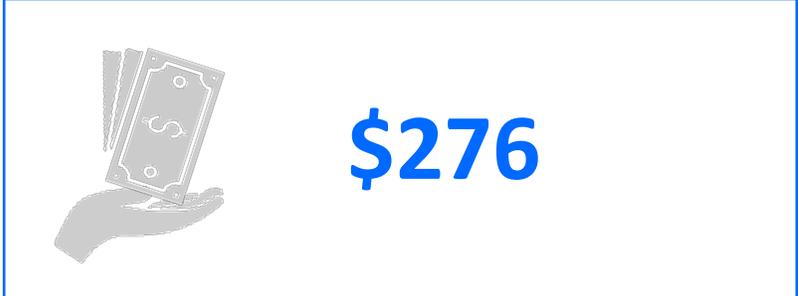
St. Petersburg	83%
Clearwater Beach	17%
Madeira Beach	15%
St. Pete Beach	11%
Treasure Island	10%

Generation X Travelers

Important Factors for Destination Selection



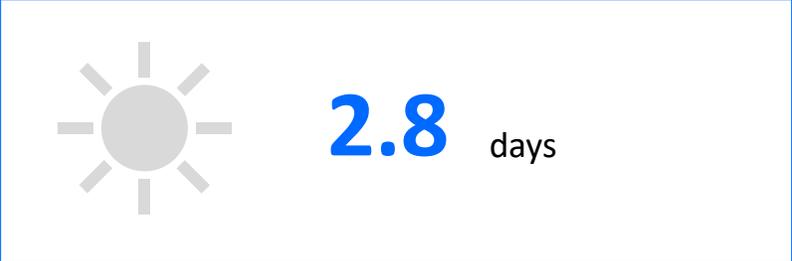
Average Daily Spending Per Person



Travel Party Size



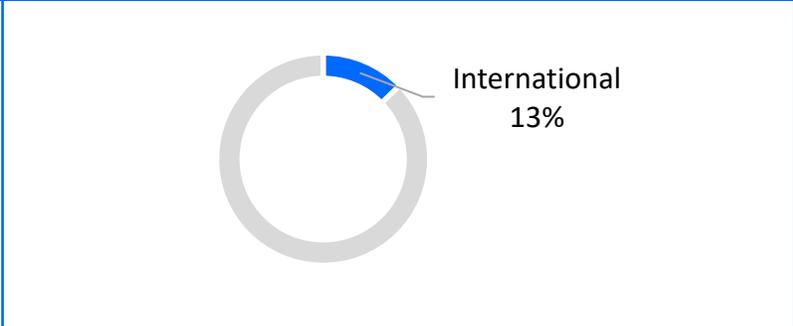
Average Length of Stay



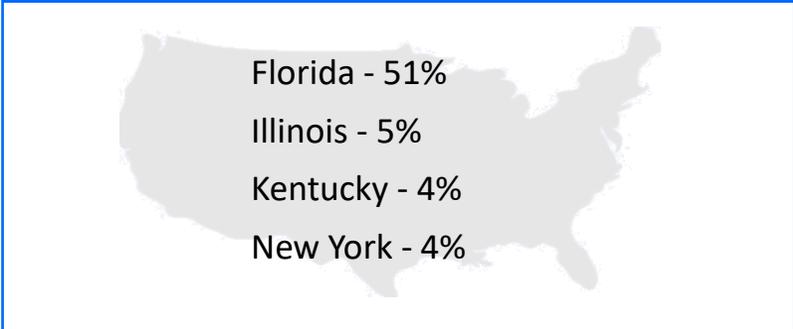
Top Activities

- Dining out - 80%
- Shopping - 56%
- Visiting the beach - 42%
- Festival/ Event - 40%

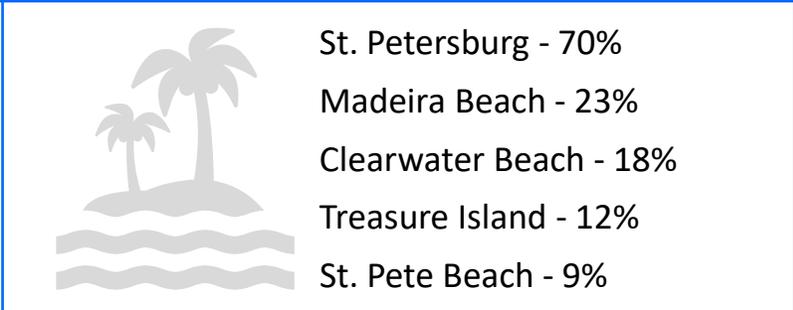
International Visitation



Origin States

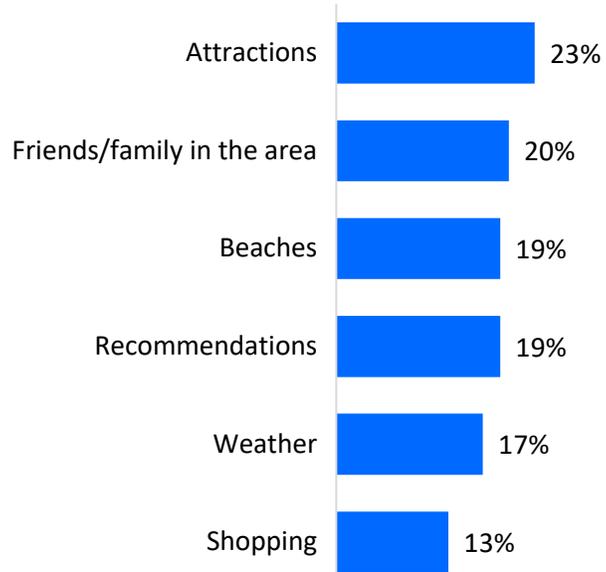


Communities Visited

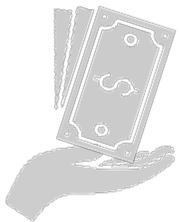


Boomer Travelers

Important Factors for Destination Selection



Average Daily Spending Per Person



\$273

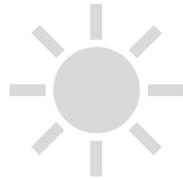
Travel Party Size



2.5

5% traveled with children

Average Length of Stay



2.7 days

Top Activities



Dining out - 84%



Shopping - 56%

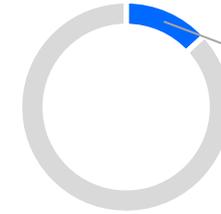


Visiting museums - 40%



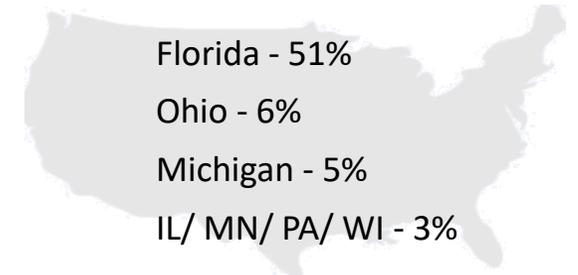
Visiting the beach - 37%

International Visitation



International
13%

Origin States



Communities Visited



St. Petersburg	64%
Madeira Beach	30%
Clearwater Beach	12%
St. Pete Beach	11%
Treasure Island	9%

Detailed Findings: Trip Planning

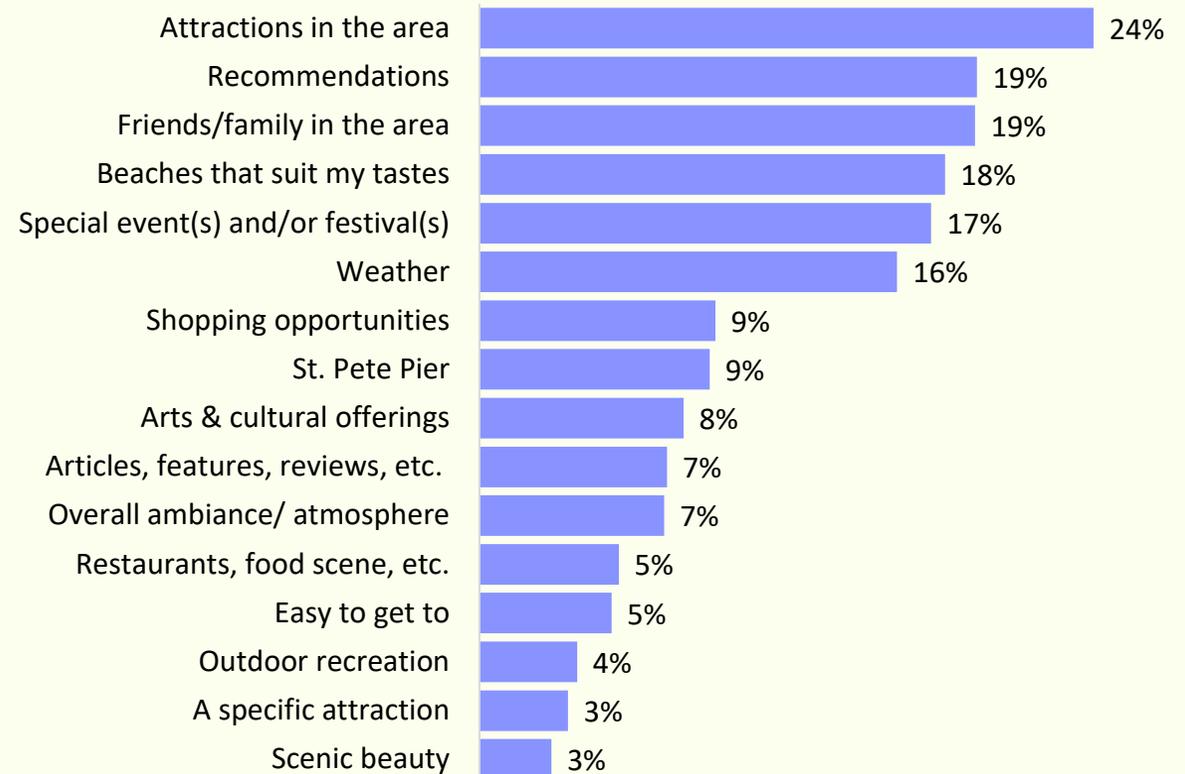
Visitors made the decision to visit St. Pete/Clearwater almost two month prior to arrival.

Attractions, recommendations, friends/family in the area, special events/festivals, beaches, and weather were the most important factors in the decision to visit St. Pete/Clearwater.

Decision-making Timeframe



Importance to Destination Decision



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?

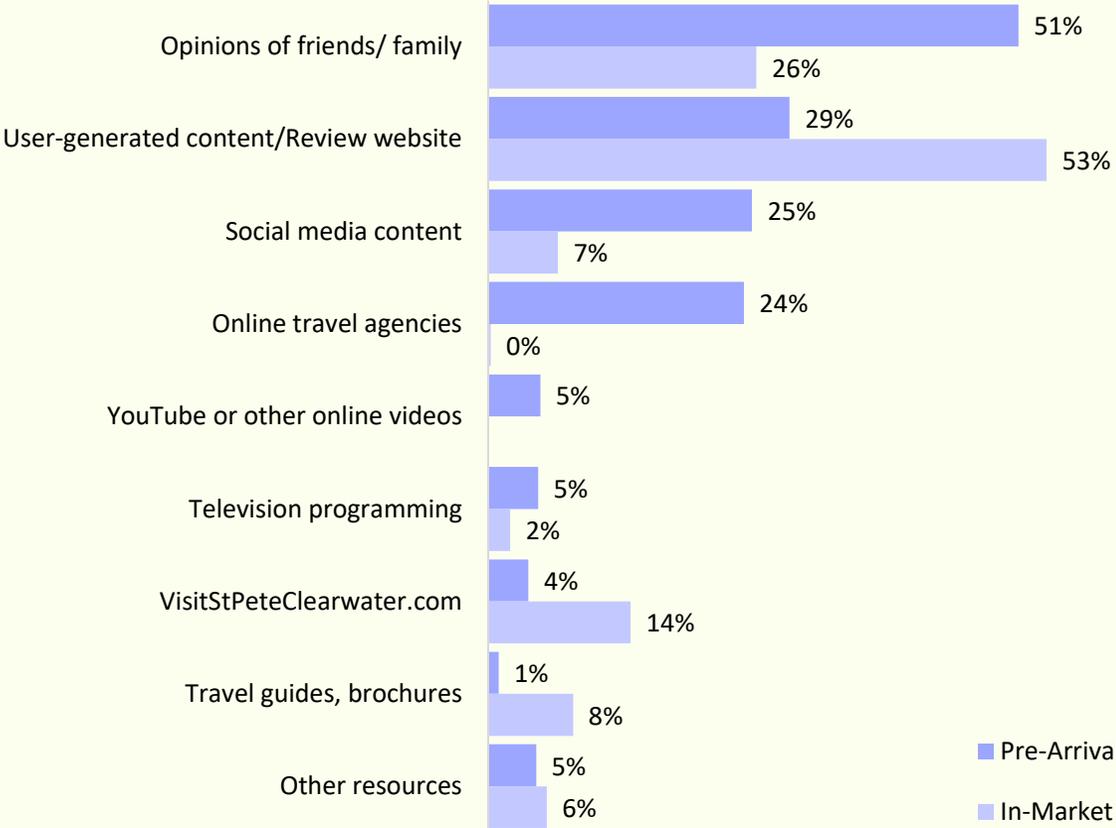
Question: Which of the following were IMPORTANT to your decision to take this trip to the St. Pete/Clearwater area? (Select all that apply)

Base sizes: Total visitors (1090)

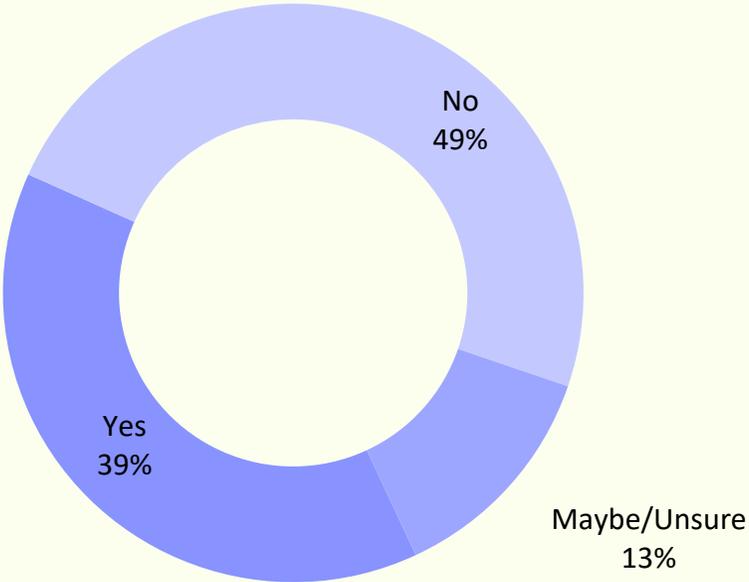
Friends/Family were the most used resource before arriving in St. Pete/Clearwater, while review websites were used most in market.

Almost half of all visitors to St. Pete/Clearwater had not seen, read, or heard advertising for the destination in the past 6 months.

Travel Planning Resources Used



Media Recall



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.)

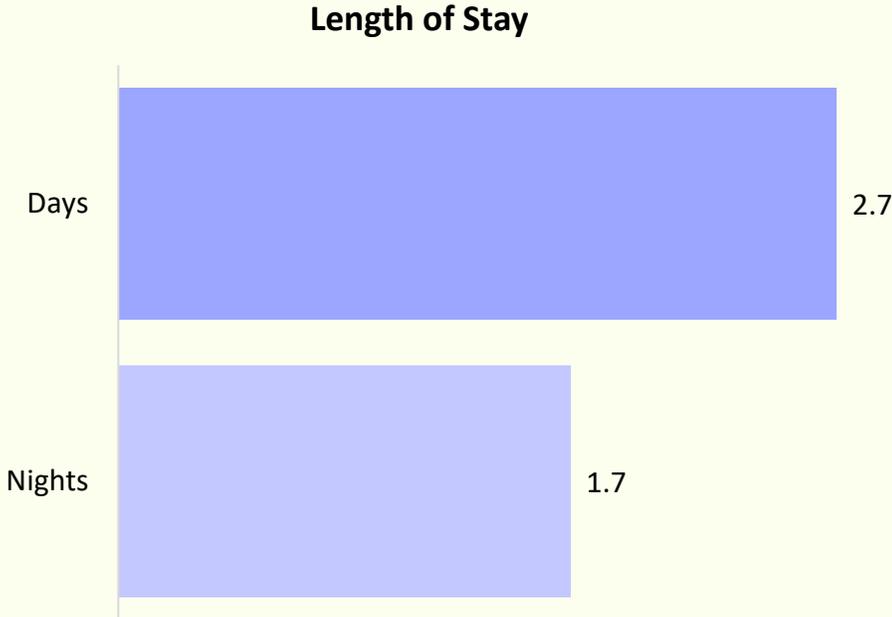
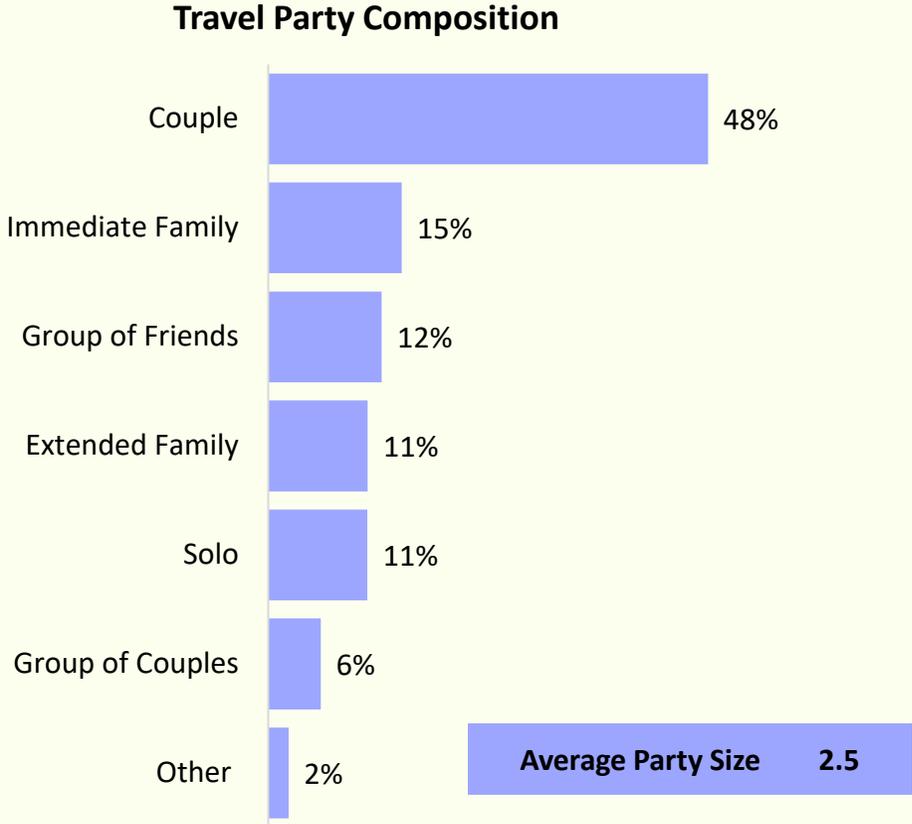
Question: In the last six months, have you seen, read, or heard any travel stories, advertising, or promotions for the St. Pete/Clearwater area?

Base sizes: Total visitors (1090)

Detailed Findings: Trip Details

Most visitors to St. Pete/Clearwater as a couple, with an average party size just over two (2) people.

Visitors stayed almost three (3) days and two (2) nights, on average.



Question: Which best describes your travel group on this trip? Are you...?

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

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

Base sizes: Total visitors (1046-1090)

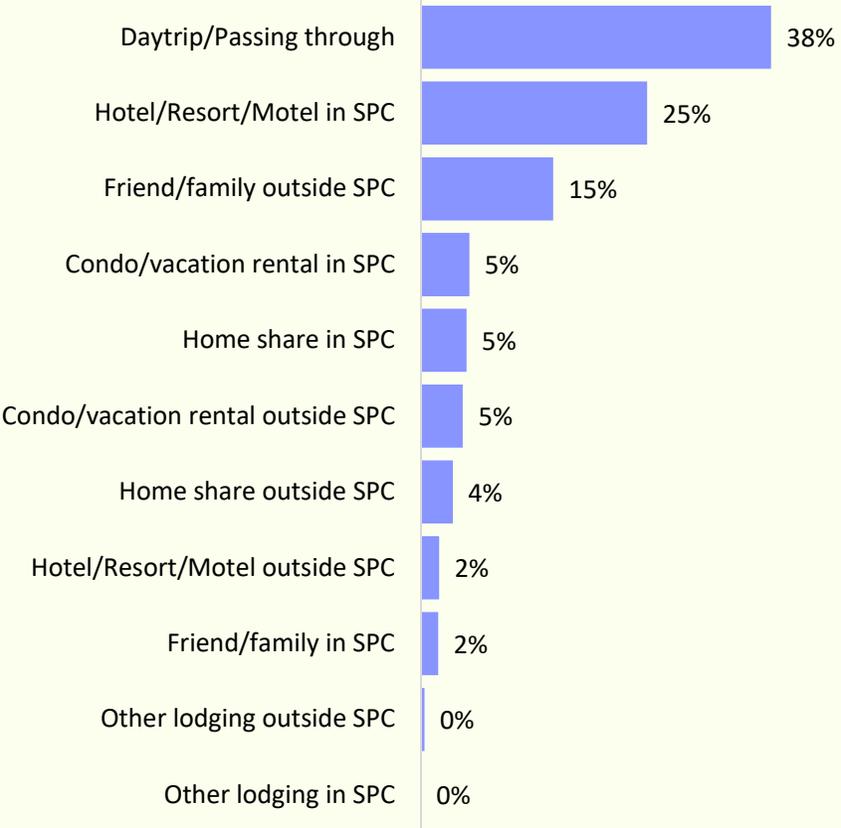
Visitors spent an average of \$270 per day, with restaurants/dining and lodging/accommodations being the largest expenses.

Staying in a hotel/resort/motel in St. Pete/Clearwater was the most used accommodation, followed by friends/family outside of the destination.

Average Daily Spend per Party



Lodging/Accommodations

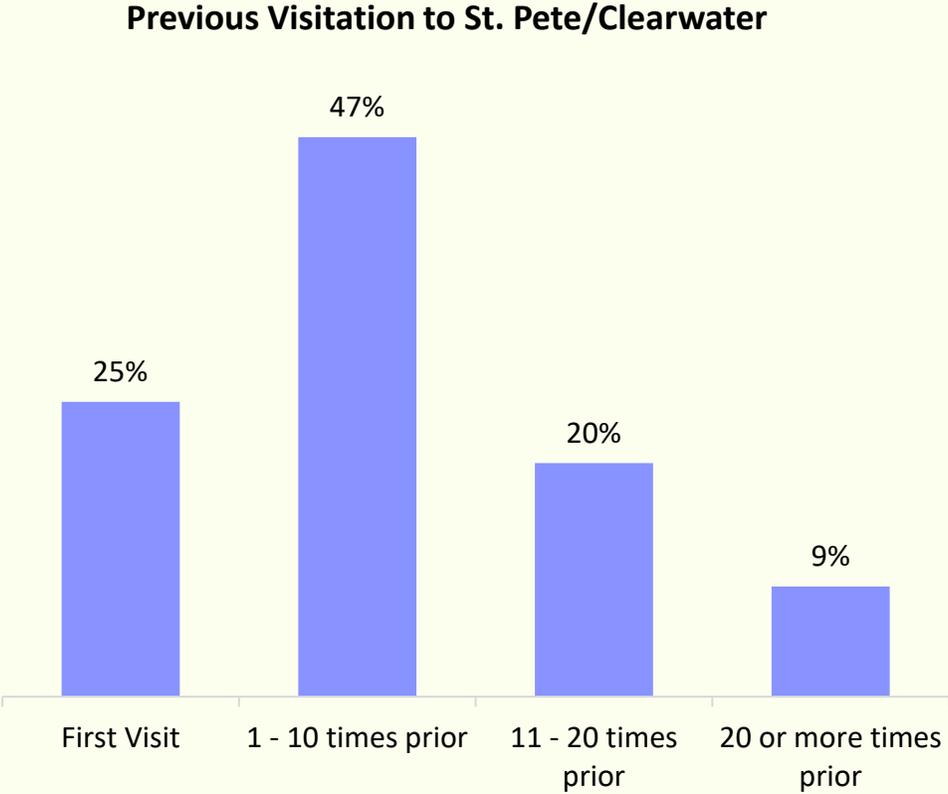
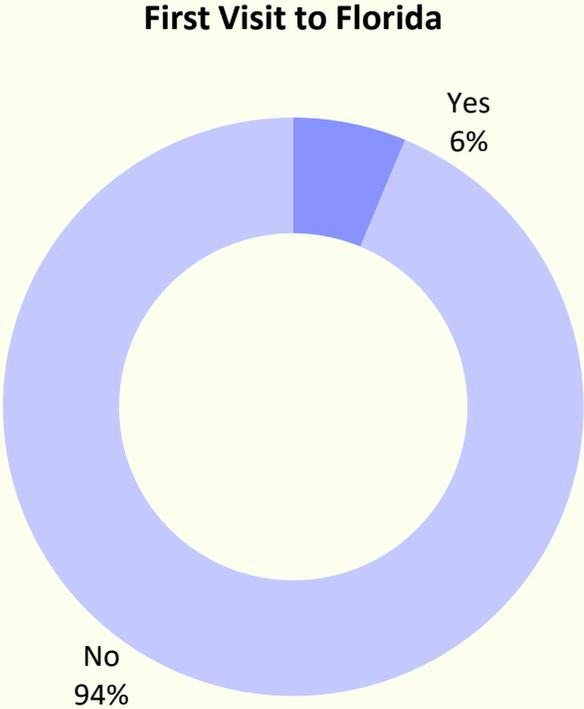


Question: PER DAY, approximately how much will you spend on each of the following while in the St. Pete/Clearwater area?

Question: Where are you staying overnight on this trip to the St. Pete/Clearwater area?

Base sizes: Total visitors (1046-1090)

Most visitors had been to Florida previously, and among those three-quarters had been to St. Pete/Clearwater before.



Average Number of Previous Visits **7.2**

Question: Is this your first visit to Florida

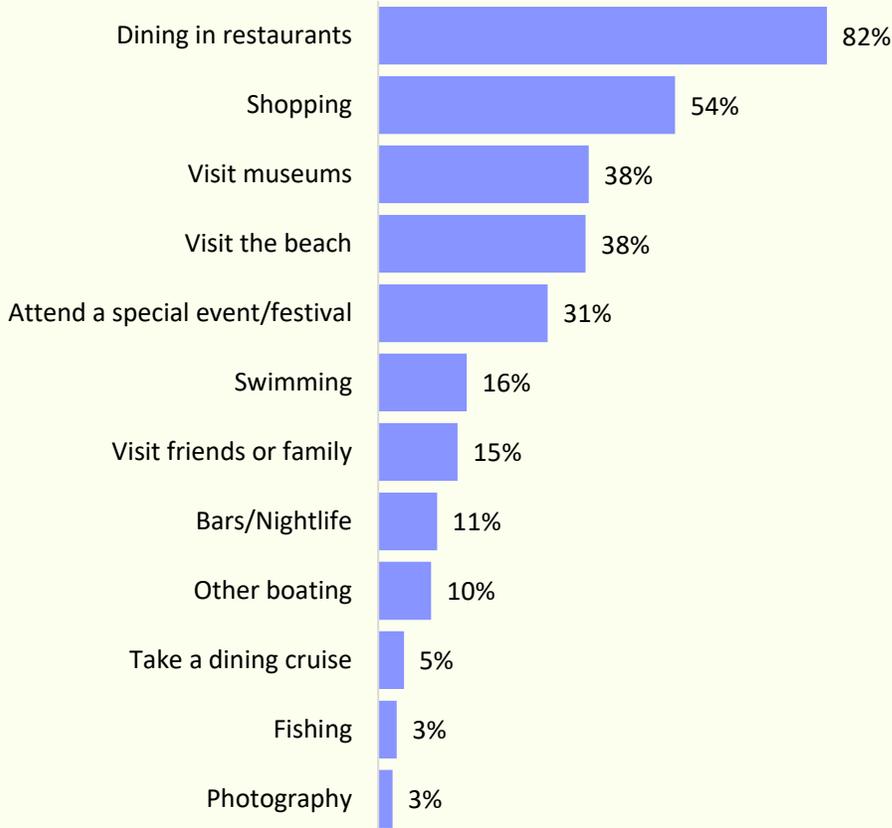
Question: How did you arrive to the St. Pete/Clearwater area and how will you leave? (Select all that apply)

Base sizes: Total visitors (1090) | Previously visited Florida (1046)

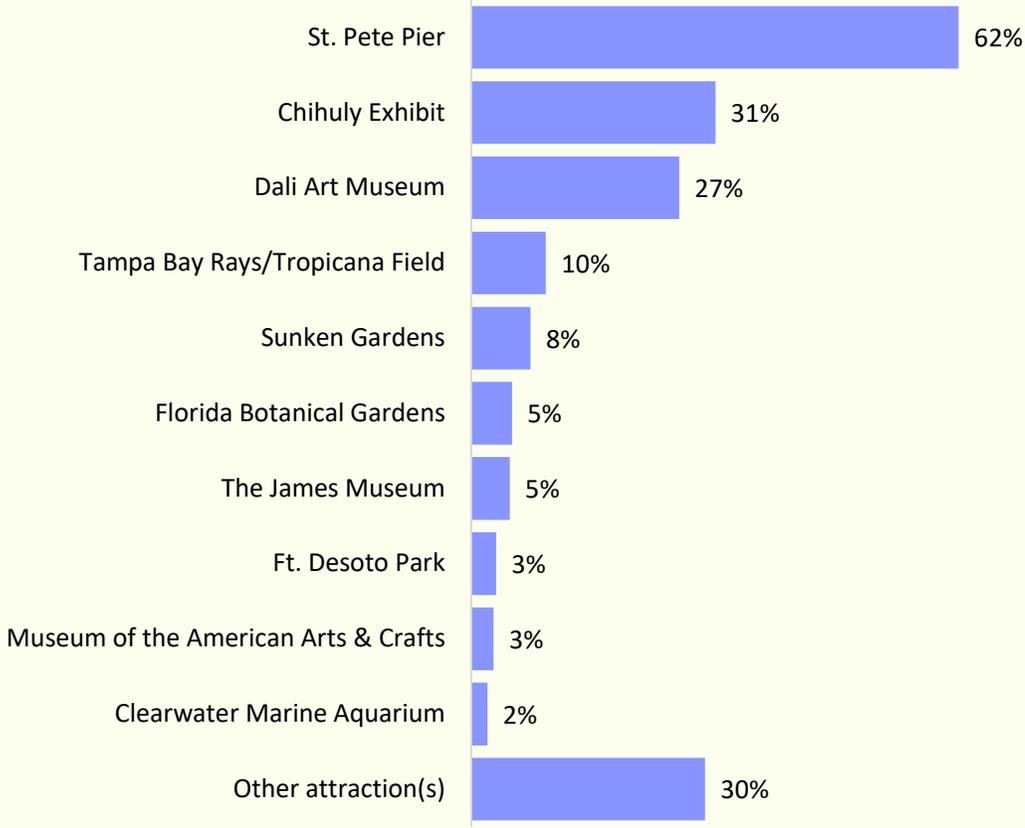
Most visitors dined in restaurants, while shopping, visiting museums, and visiting the beach were also popular activities.

St. Pete Pier was the most visited attraction, followed by the Chihuly Exhibit and the Dali Art Museum.

Trip Activities



Attractions Visited



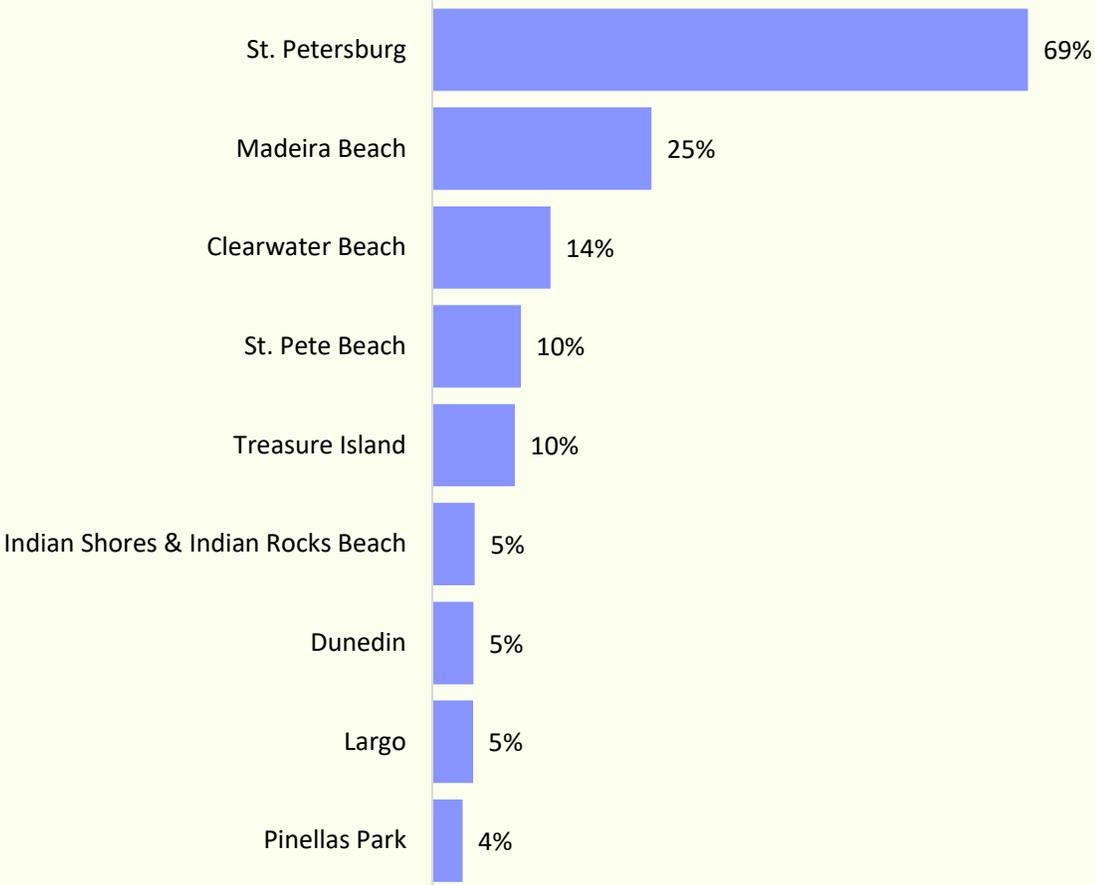
Question: Which of these activities did you, or will you, participate in while in the St. Pete/Clearwater area? (Select all that apply)

Question: Which of these attractions did you (or will you) visit while on this trip? (Select all that apply)

Base sizes: Total visitors (837-1090, excludes "None of these")

St. Petersburg was the most visited area, followed by Madeira Beach.

Communities Visited



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

Base sizes: Total visitors (1090)

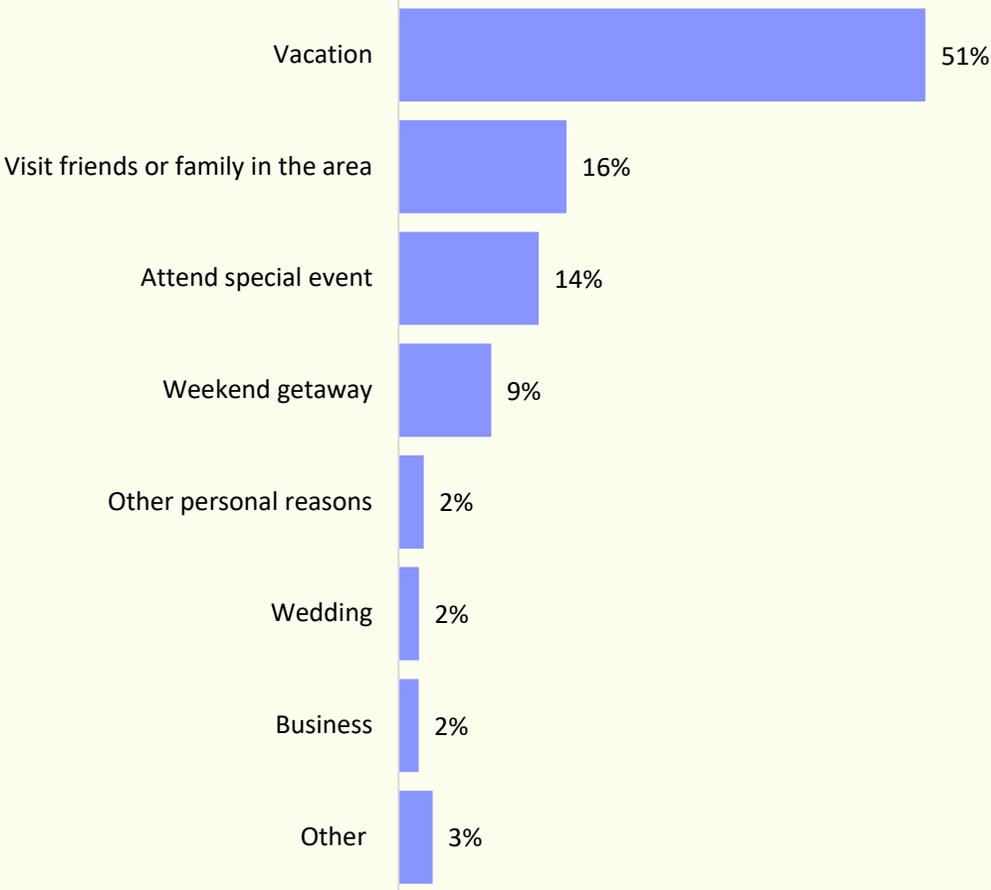
Future Partners



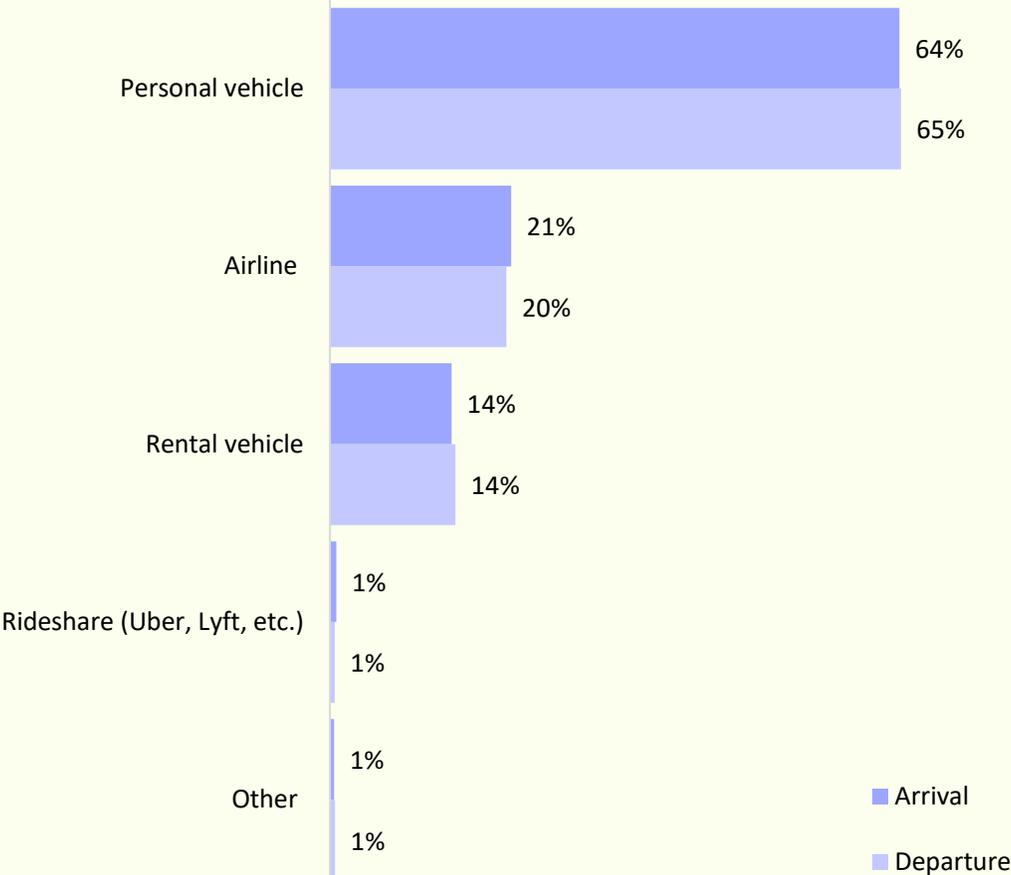
Most visitors came to St. Pete/Clearwater for vacation.

Personal car/vehicle was the most used method of arrival and departure from the area.

Primary Reason for Visit



Method of Arrival & Departure



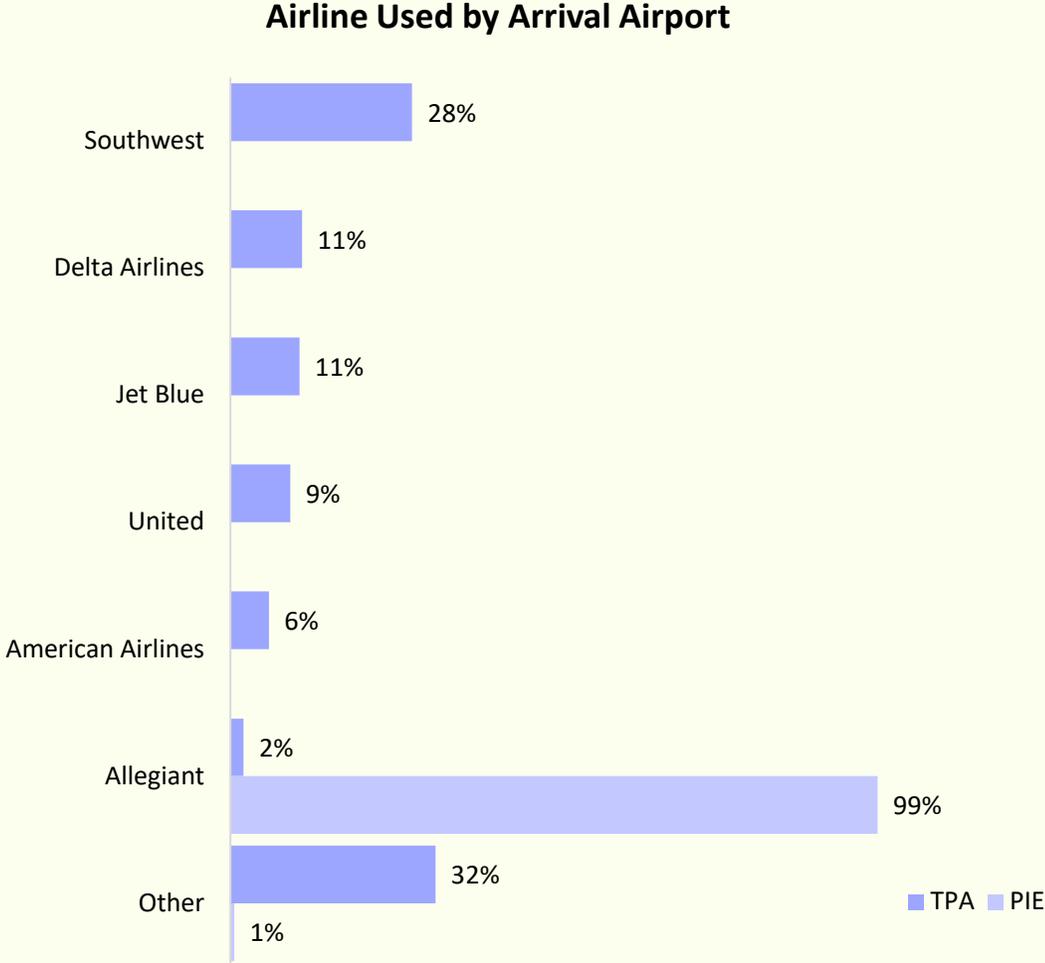
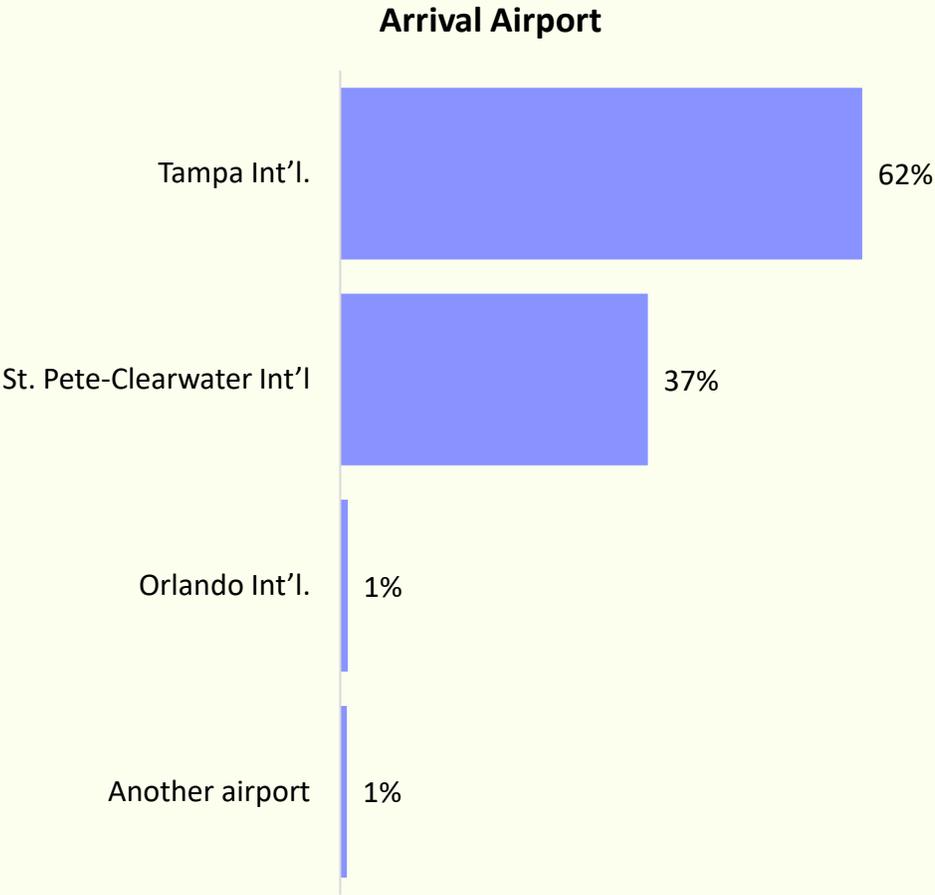
Question: What is your primary reason for visiting the St. Pete/Clearwater Area?

Question: How did you arrive to the St. Pete/Clearwater area and how will you leave? (Select all that apply)

Base sizes: Total visitors (1090)

Most visitors who flew into the area used TIA.

A number of airlines were used by those who flew into TIA, while almost all visitors who flew into PIE used Allegiant.



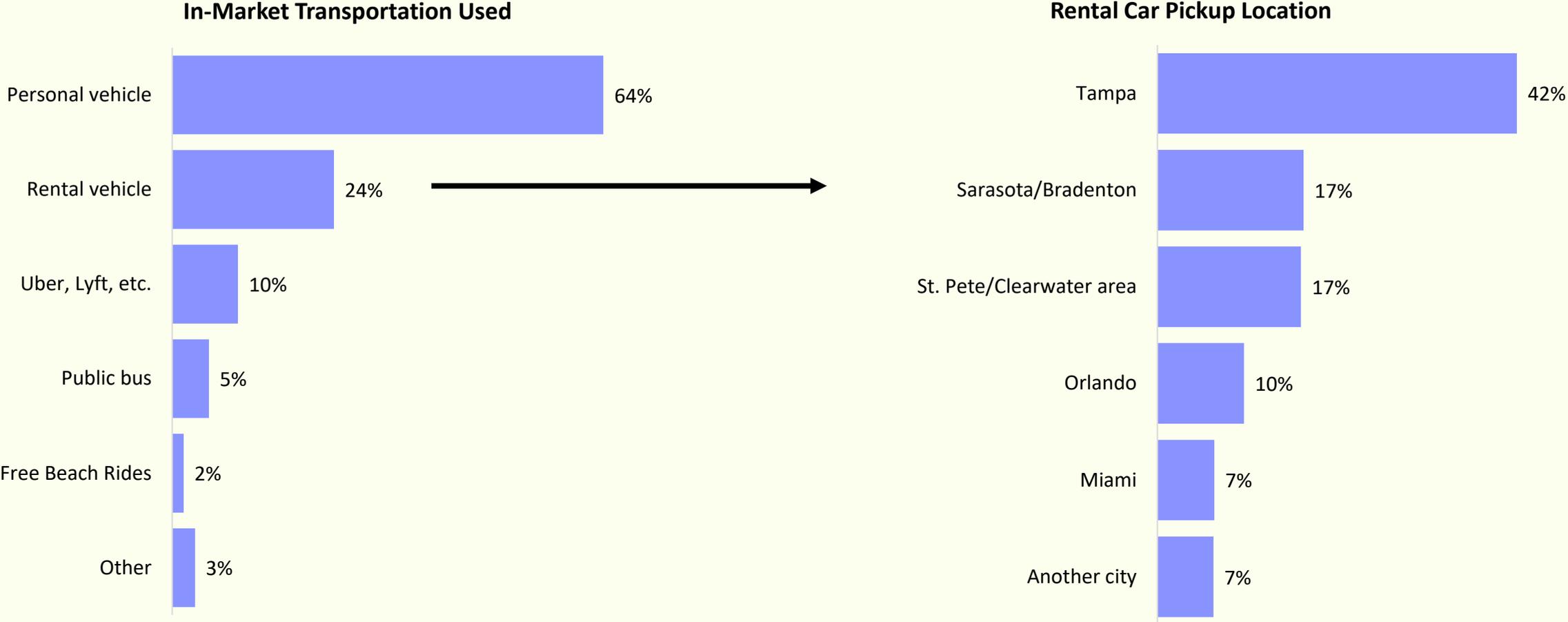
Question: At which airport did you arrive at the area?

Question: Which airline did you use?

Base sizes: Visitors who arrived at the area by airplane (363) | Visitors who arrived in the area by airplane at TIA or PIE (216/139)

Most visitors used their personal car/vehicle while in the area.

Among those who used a rental car in the area, most picked it up in Tampa.



Question: Which modes of transportation did you, or will you, use while in the St. Pete/Clearwater area?

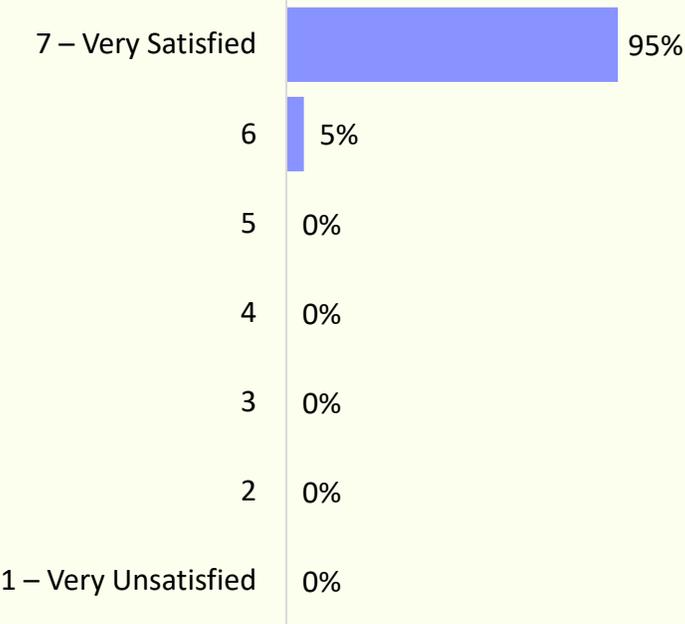
Question: Which airline did you use?

Base sizes: All visitors (1090) | Visitors who arrived in the area by rental car (298)

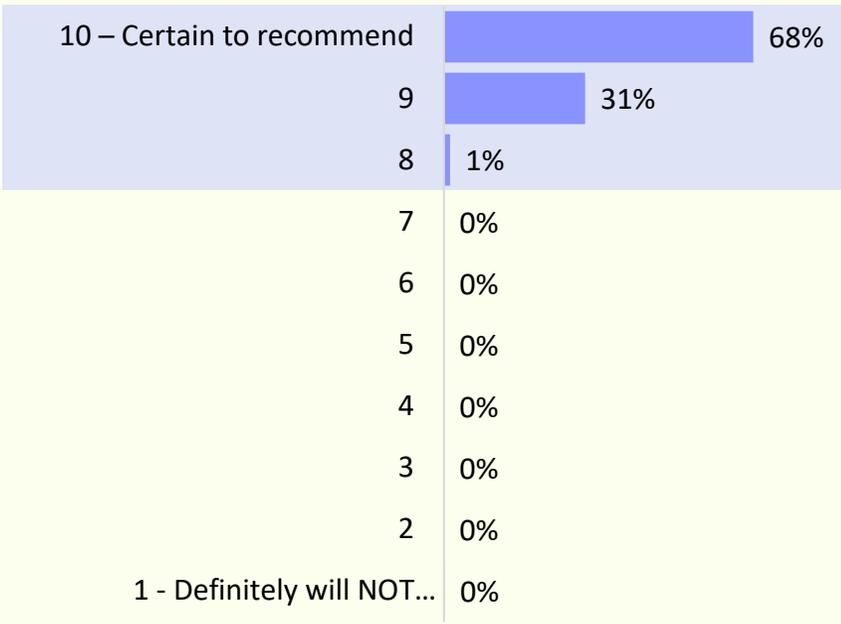
Detailed Findings: Visitor Satisfaction

Visitors were very satisfied with St. Pete/Clearwater and are very likely to recommend the area to friends/family, as well as return to the destination themselves.

Satisfaction



Likelihood to Recommend



Likelihood to Return

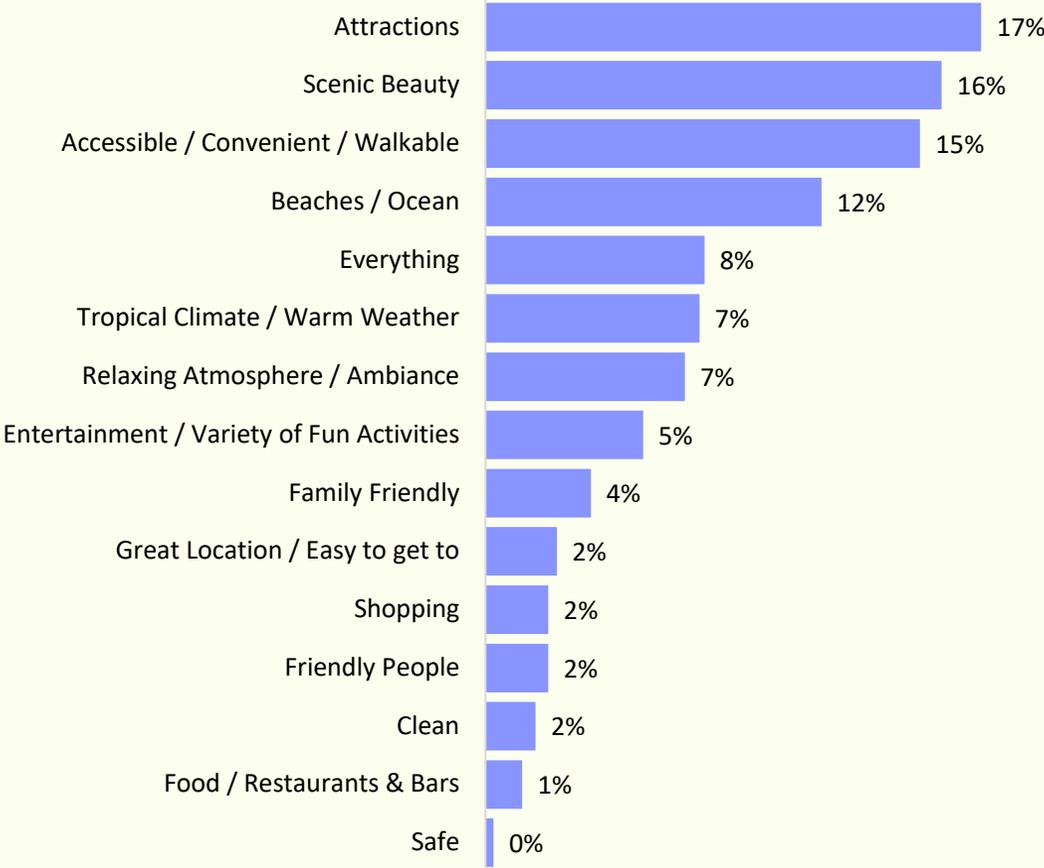


Question: How satisfied are you with your experience in the St. Pete/Clearwater area on this trip?
 Question: How likely are you to recommend the St. Pete/Clearwater area as a place to visit to other travelers?
 Question: How likely are you to return to the St. Pete/Clearwater area?

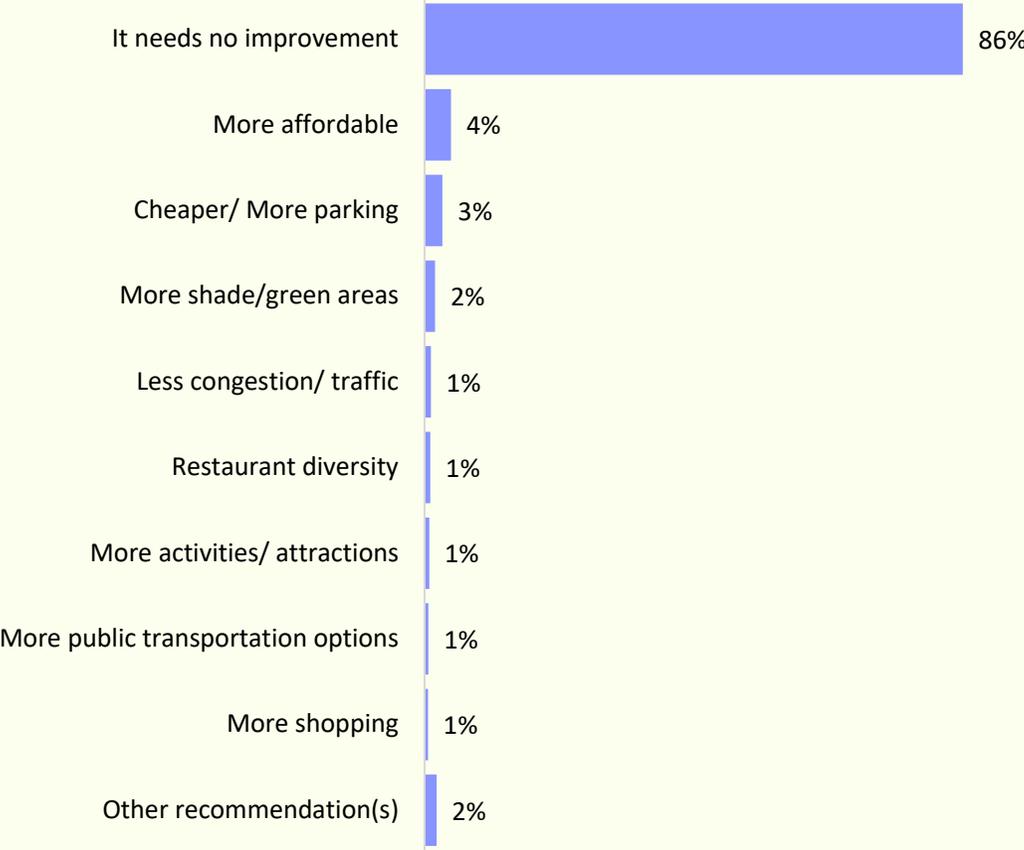
Base size: Total visitors (1090).

The most liked aspects of St. Pete/Clearwater are the attractions and the beaches/ocean

Most Liked Aspects of St. Pete/Clearwater



Recommended Improvements: Attractions & Services



Question: What do you like most about the St. Pete/Clearwater area? (Unaided)

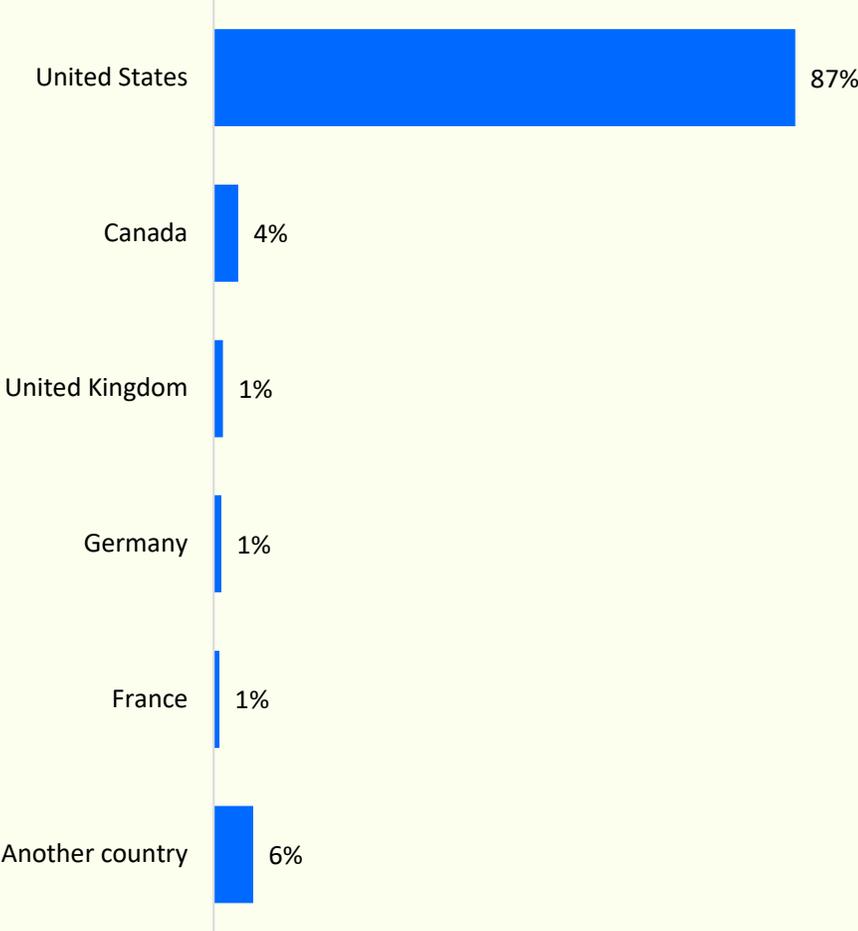
Question: In your opinion, what services or additional attractions would most enhance your experience in the St. Pete/Clearwater area? (Unaided)

Base sizes: Total visitors (1090)

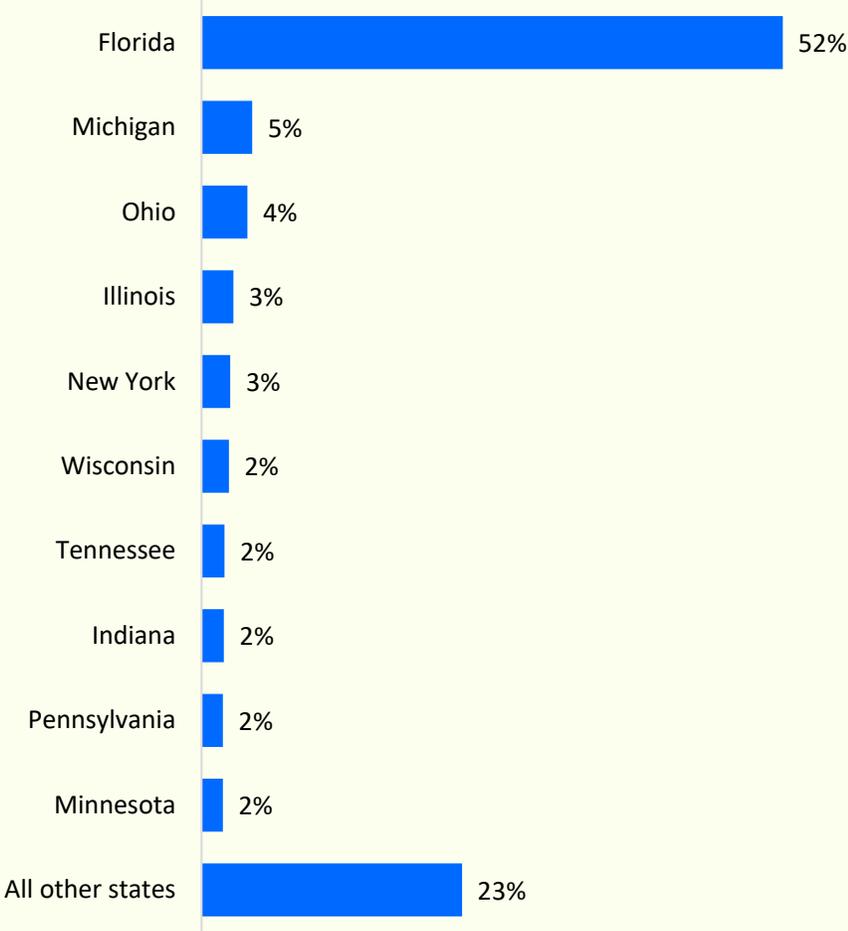
Demographics

Origin Market

Country of Origin

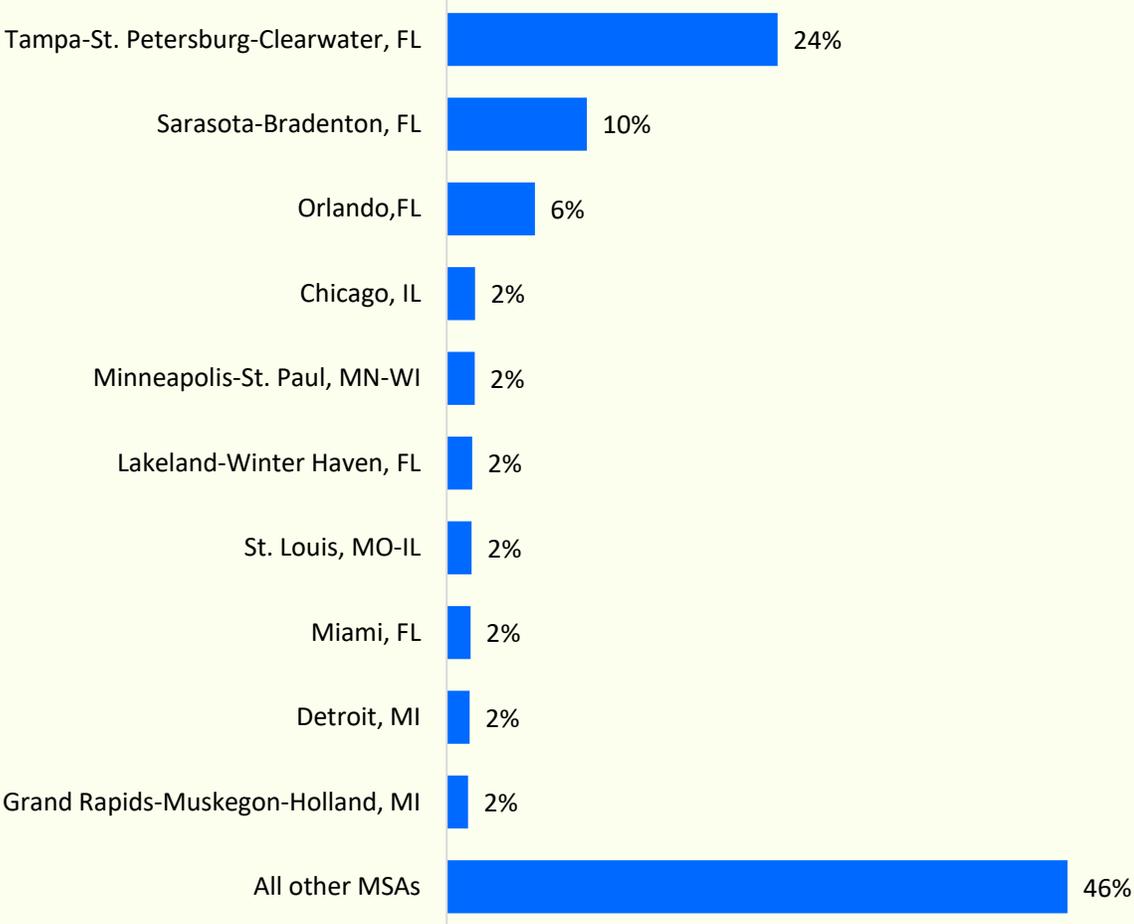


U.S. State of Origin



Origin Market

MSA of Origin



Future Partners

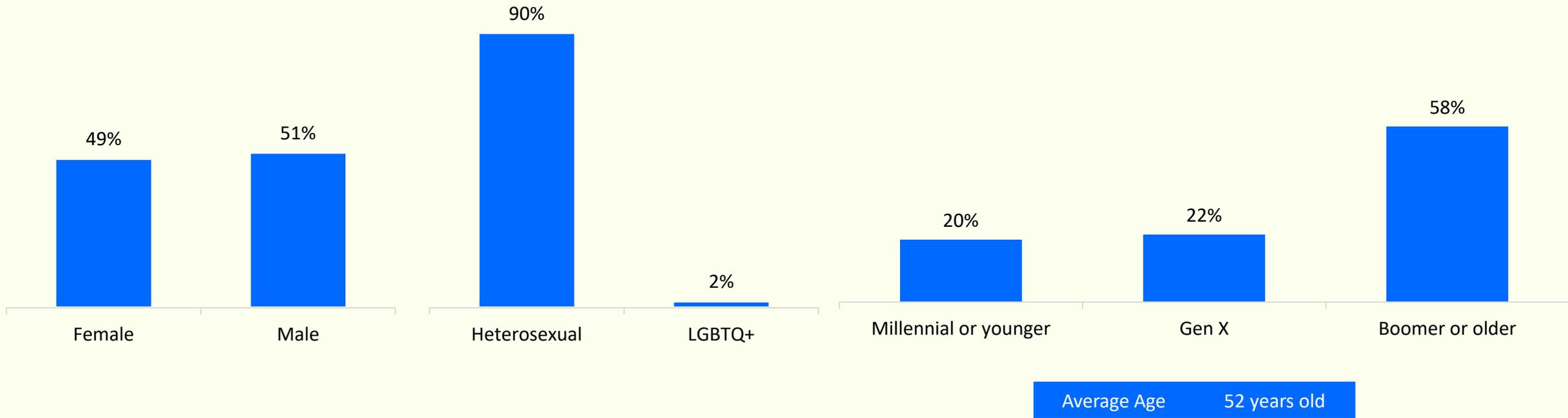


Demographics

Gender

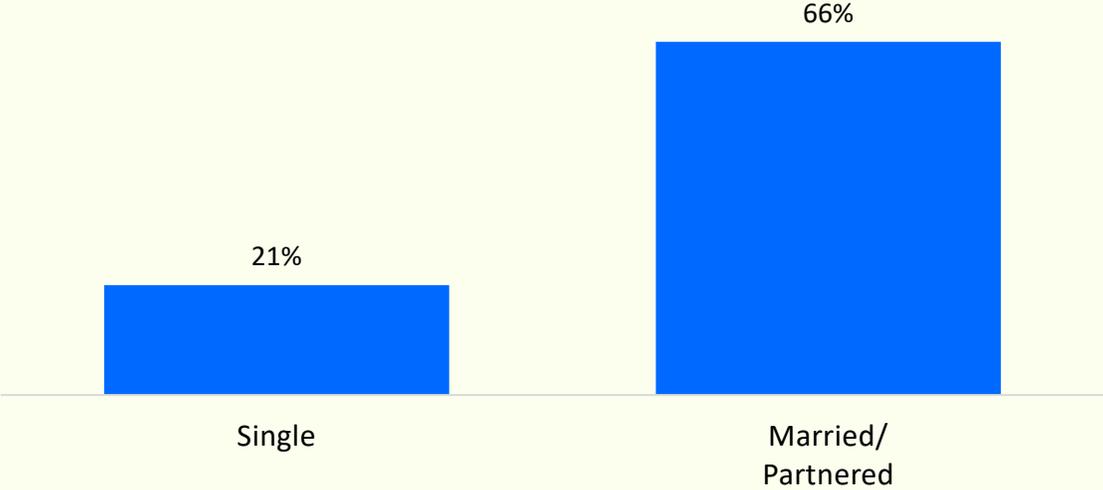
Orientation

Generation



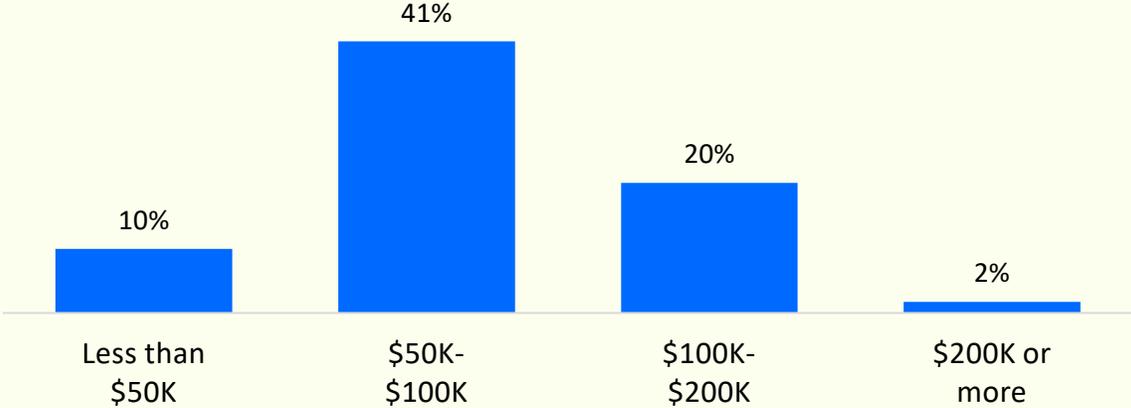
Demographics

Marital Status



Children in Household 10%

Household Income



Average HHI \$87,749

Demographics

Ethnicity/Racial Identity

