

# 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 Q1 2024 (January - March) findings for the visitor profile research.

**Future Partners**



# Methodology & Analysis

In total, 1,148 completed surveys from Pinellas Co. visitors were collected from January through March 2024. 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 – Q1 2024

Visitors to Pinellas Co.   
**4.1 Million**

Direct Visitor Spending   
**\$2.0 Billion**

Total Economic Impact   
**\$3.2 Billion**

Tax Revenues   
**\$129.2 Million**

 Hotel Room Nights  
**1.8 Million**

 Tourism Industry Payroll  
**\$1.0 Billion**

 Jobs Supported  
**Over 31,000**

# Economic Impact Estimates

The visitor volume to St. Pete/Clearwater in Q1 2024 (January - March) is estimated to total 4,109,415. Additionally, it is estimated that visitors to the area during this timeframe generated almost \$2.0 billion in direct spending and almost \$130 million in tax revenue for Pinellas Co.

	<b>Q1 2023 (Jan – Mar)</b>	<b>Q2 2023 (Apr – Jun)</b>	<b>Q3 2023 (Jul – Sep)</b>	<b>Q4 2023 (Oct – Dec)</b>	<b>Q1 2024 (Jan – Mar)</b>
Visitors to Pinellas Co.	4,446,523	4,225,362	3,751,685	3,387,120	4,109,415
Direct Visitor Spending in Pinellas Co.	\$2,020,069,440	\$1,656,120,785	\$1,425,037,162	\$1,466,267,870	\$1,978,345,214
Total Economic Impact of Tourism to Pinellas Co.	\$3,318,830,071	\$2,782,000,040	\$2,340,821,574	\$2,346,945,485	\$3,242,183,648
Tax Revenue Generated for Pinellas Co.	\$131,990,815	\$109,694,932	\$88,790,118	\$88,506,846	\$129,175,193
Hotel Room Nights	1,850,307	1,704,274	1,505,245	1,443,568	1,774,670
Tourism Industry Payroll	\$1,047,151,186	\$883,044,582	\$744,509,598	\$745,503,967	\$1,020,297,731
Jobs Supported	31,883	26,964	22,837	22,854	31,281

## Economic Impact Estimates - by Visitor Type & Category

January - March 2024		
	Visitors	Direct Spend
Hotel/ Motel/ B&B	843,581	\$961,694
Friends/ Relatives (VFR)	204,167	\$135,782
Vacation Rental	239,495	\$240,249
Day Trip (Regional)	965,801	\$114,986
Day Trip (Traveler)	1,591,040	\$196,624
Peer-to-Peer	244,757	\$320,172
Other	20,573	\$8,838
<b>Total Visitors</b>	<b>4,109,415</b>	<b>\$1,978,345</b>

January - March 2024	
	Category Spend
Lodging/ Accommodations	\$675,565
Restaurants/ Dining	\$538,062
Retail/ Shopping	\$332,153
Entertainment/ Sightseeing	\$244,407
Local Transportation	\$61,586
Car Rental	\$108,859
Other	\$17,713
<b>Total Direct Spending</b>	<b>\$1,978,345</b>



# Economic Impact: Definitions

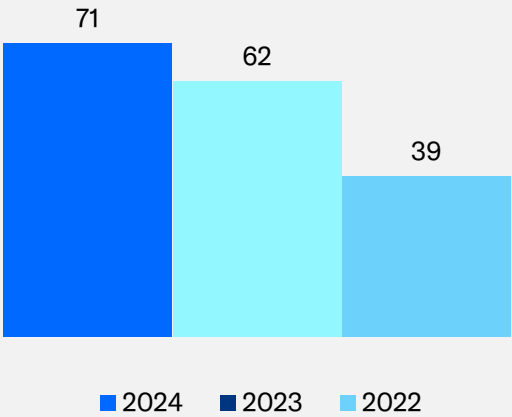
The following definitions, as they relate to economic impact, are used throughout this report:

- **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

# Year-over-Year Comparisons for Q1

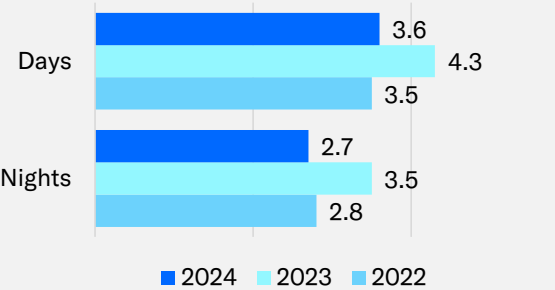
## Average Days Between Decision to Visit & Arrival



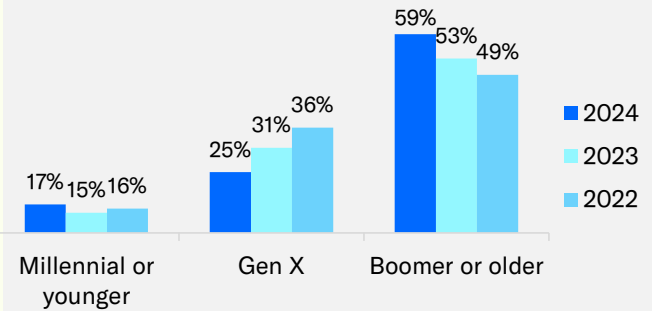
## Travel Party Size



## Average Days & Nights



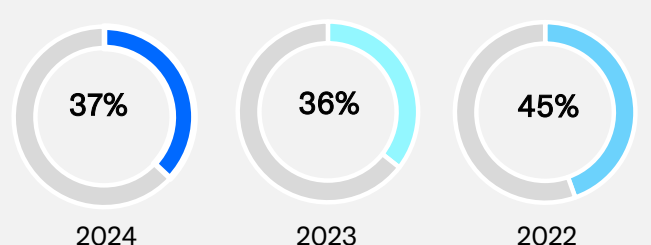
## Generation



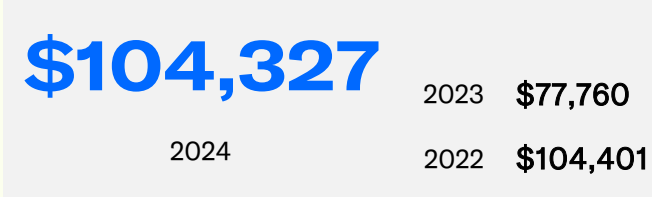
## Average Daily Spending Per Travel Party



## Overnight in Pinellas Co.



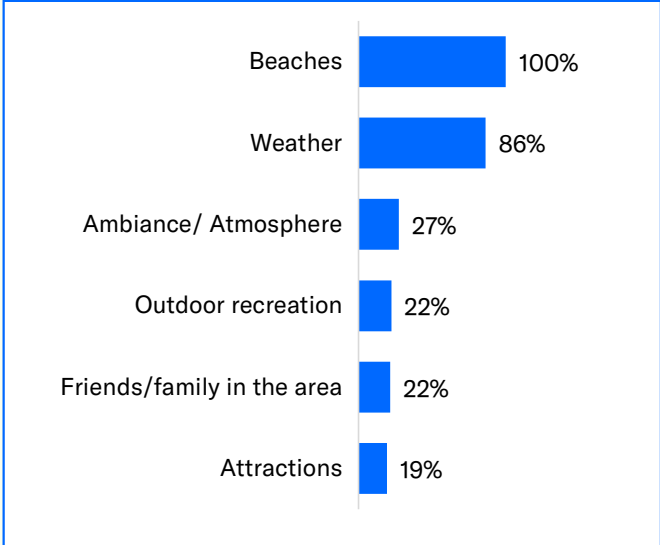
## Average Household Income



# Infographic: Traveler Segments

# Beach-goer

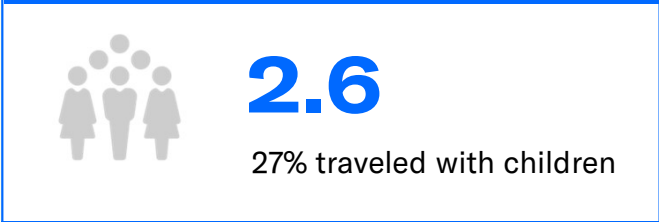
## Important Factors for Destination Selection



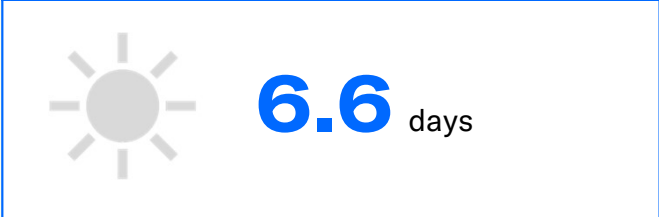
## Average Daily Spending Per Person



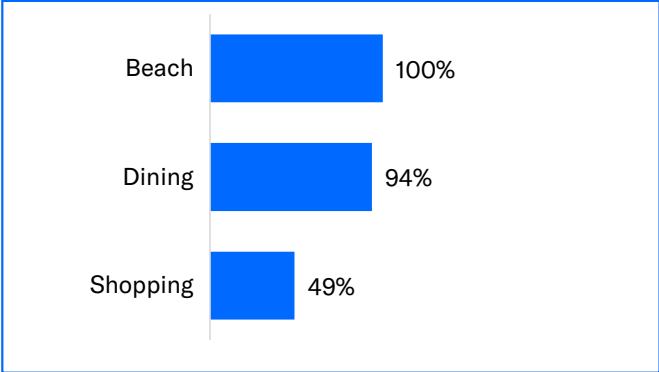
## Travel Party Size



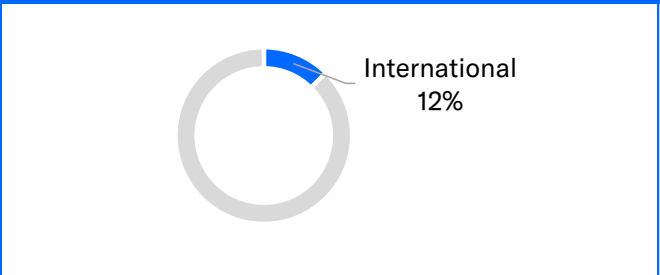
## Average Length of Stay



## Top Activities



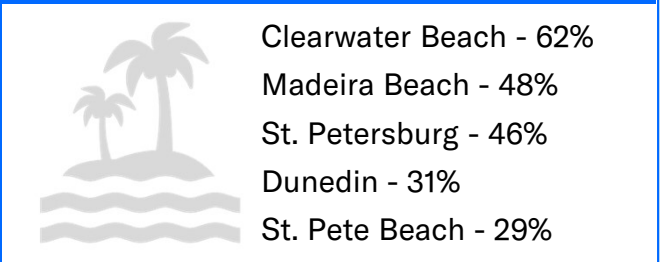
## International Visitation



## Origin States

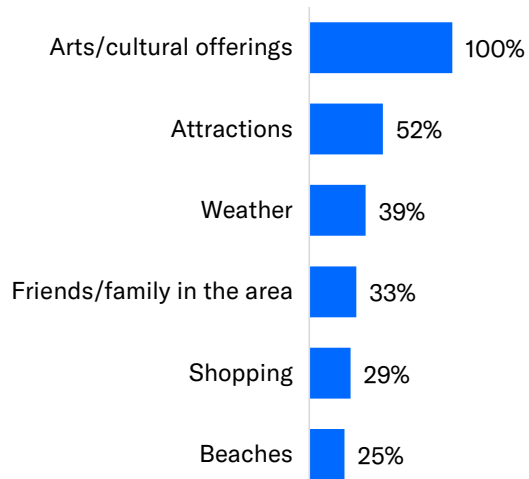


## Communities Visited



# Arts & Culture Visitor

## Important Factors for Destination Selection



## Average Daily Spending Per Person



**\$401**

## Travel Party Size



**2.4**

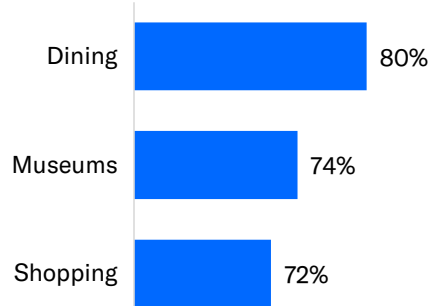
8% traveled with children

## Average Length of Stay

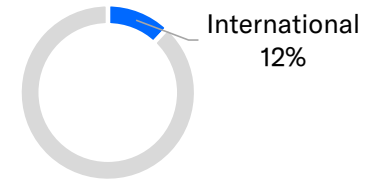


**3.8** days

## Top Activities



## International Visitation



## Origin States



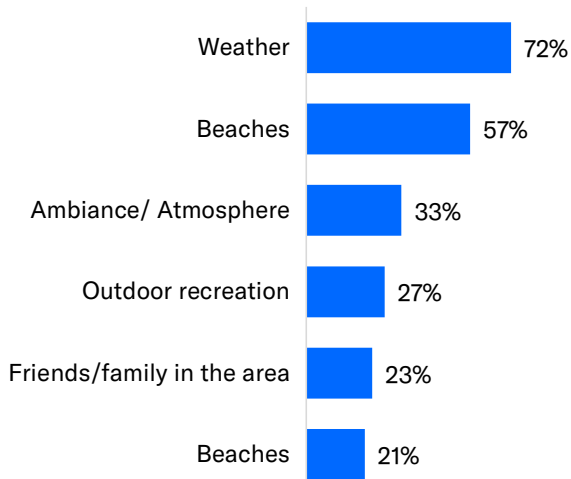
## Communities Visited



St. Petersburg - 67%  
Clearwater Beach - 33%  
St. Pete Beach - 26%  
Madeira Beach - 22%  
Dunedin - 12%

# Affluent Traveler

## Important Factors for Destination Selection



## Average Daily Spending Per Person



**\$423**

## Travel Party Size



**2.7**

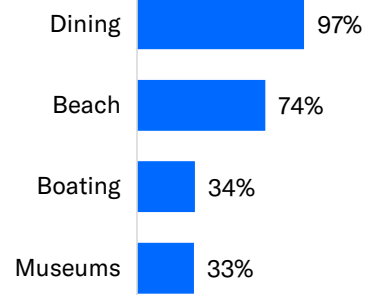
33% traveled with children

## Average Length of Stay

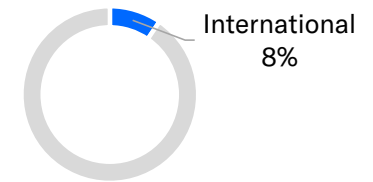


**5.5** days

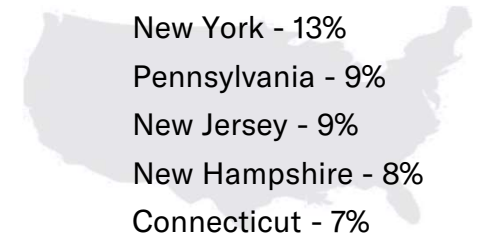
## Top Activities



## International Visitation



## Origin States



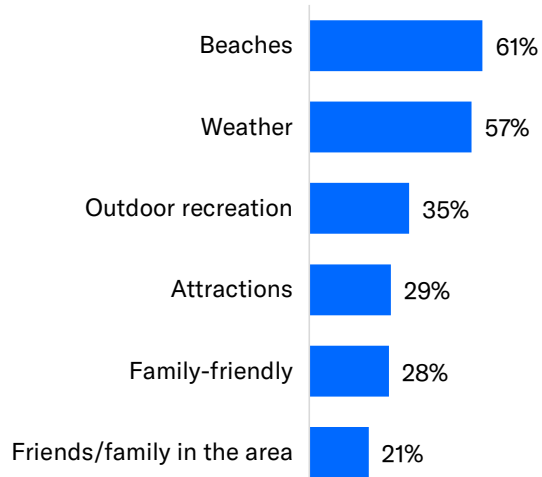
## Communities Visited



Clearwater Beach - 52%  
 St. Petersburg - 46%  
 Madeira Beach - 39%  
 Dunedin - 36%  
 St. Pete Beach - 22%

# Family Traveler

## Important Factors for Destination Selection



## Average Daily Spending Per Person



**\$409**

## Travel Party Size



**4.0**

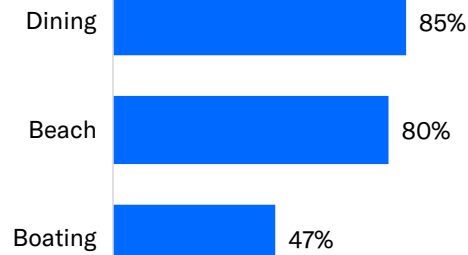
100% traveled with children

## Average Length of Stay

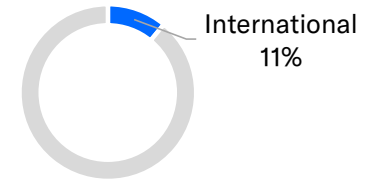


**5.1** days

## Top Activities



## International Visitation



## Origin States



## Communities Visited



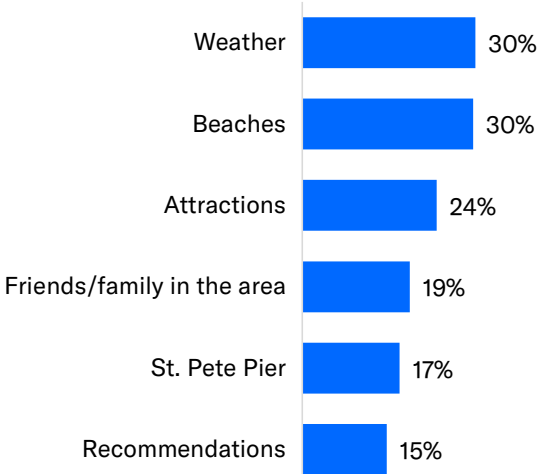
Clearwater Beach - 50%  
Madeira Beach - 42%  
St. Petersburg - 41%  
Dunedin - 19%  
St. Pete Beach - 16%



# Infographic: Generations

# Millennial Travelers

## Important Factors for Destination Selection



## Average Daily Spending Per Person



**\$280**

## Travel Party Size



**2.5**

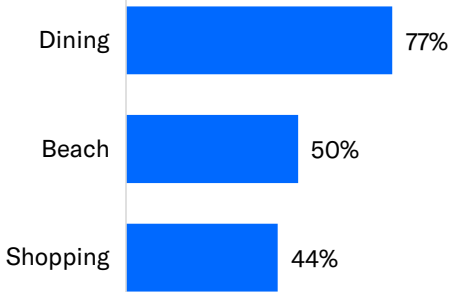
22% traveled with children

## Average Length of Stay

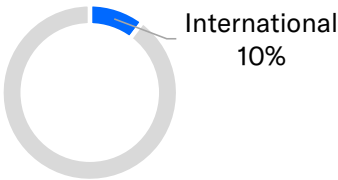


**2.9** days

## Top Activities



## International Visitation



## Origin States



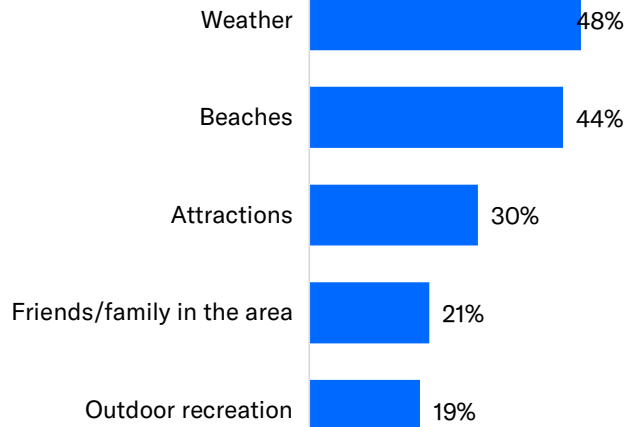
## Communities Visited



St. Petersburg - 70%  
Clearwater Beach - 30%  
Madeira Beach - 16%  
Dunedin - 12%  
St. Pete Beach - 11%

# Gen X Travelers

## Important Factors for Destination Selection



## Average Daily Spending Per Person



**\$358**

## Travel Party Size



**2.7**

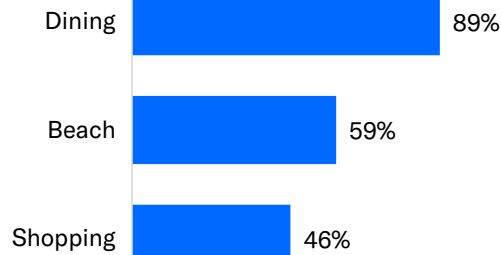
37% traveled with children

## Average Length of Stay

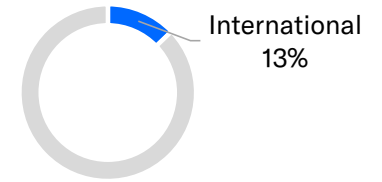


**4.0** days

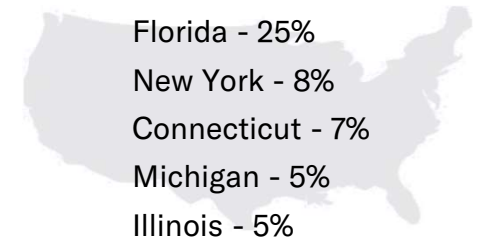
## Top Activities



## International Visitation



## Origin States



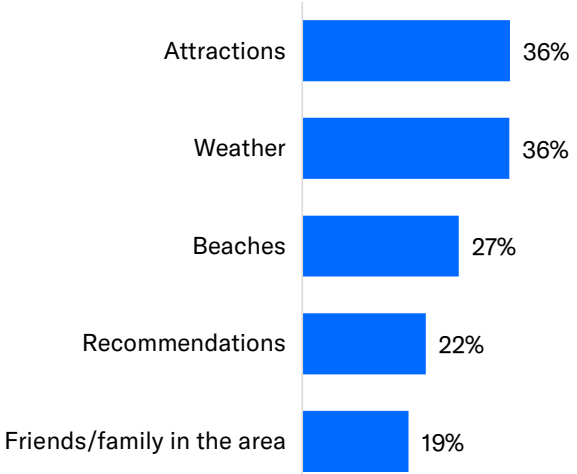
## Communities Visited



St. Petersburg - 51%  
Clearwater Beach - 39%  
Madeira Beach - 29%  
St. Pete Beach - 19%  
Dunedin - 13%

# Boomer Travelers

## Important Factors for Destination Selection



## Average Daily Spending Per Person



**\$296**

## Travel Party Size



**2.4**

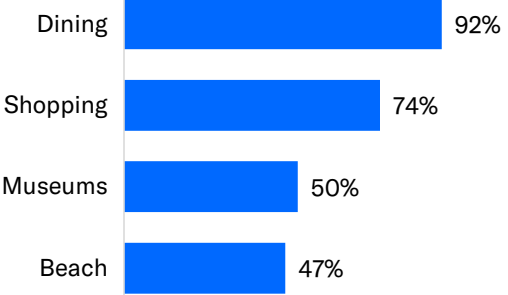
3% traveled with children

## Average Length of Stay

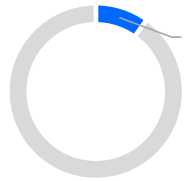


**3.7** days

## Top Activities



## International Visitation



International  
9%

## Origin States



## Communities Visited



- St. Petersburg - 71%
- Madeira Beach - 31%
- Clearwater Beach - 23%
- Dunedin - 15%
- St. Pete Beach - 14%

# Detailed Findings: Trip Planning

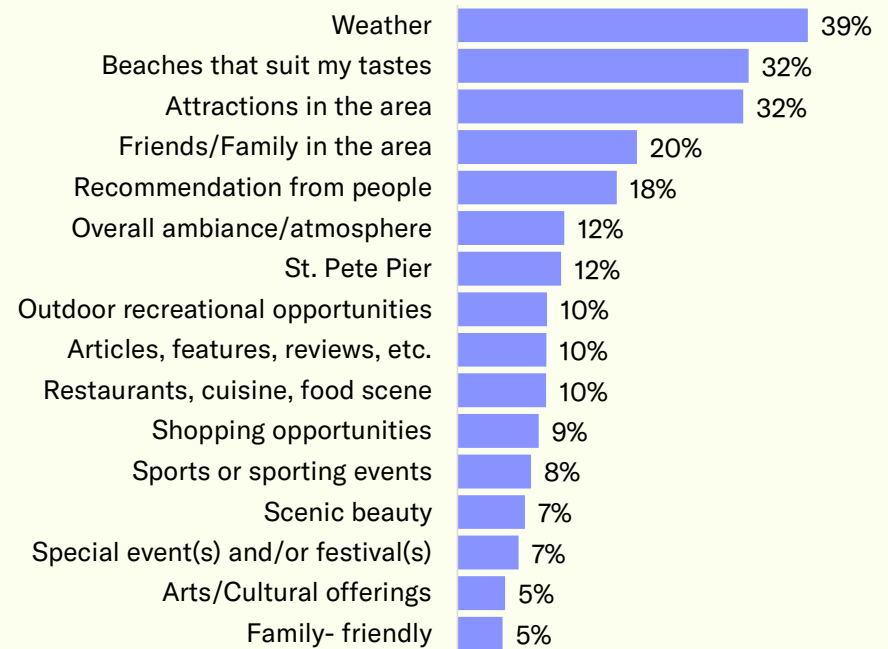
# Visitors made the decision to visit St. Pete/Clearwater over two month prior to arrival.

Weather, beaches, and attractions 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?

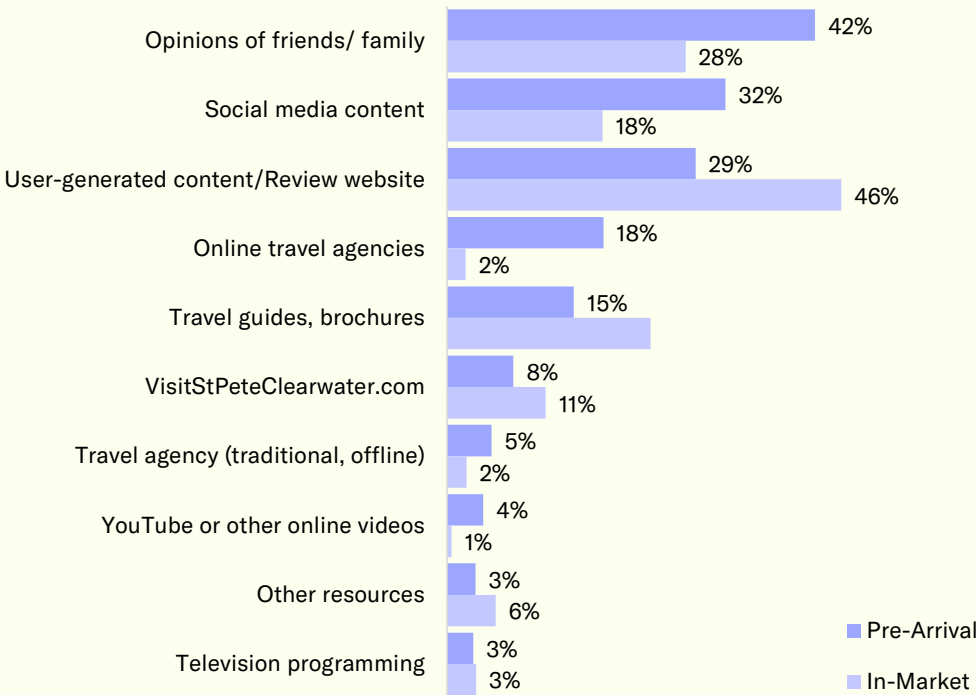
Question: Which of the following were IMPORTANT to your decision to take this trip to the St. Pete/Clearwater area? (Select all that apply)

Base sizes: Total visitors (1131-1148)

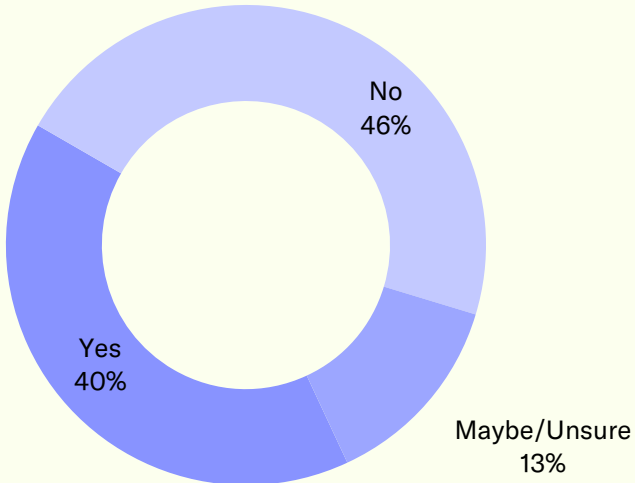
# Friends/Family were the most used resource before arriving in St. Pete/Clearwater, while review websites were used most in market.

Less than half of all visitors to St. Pete/Clearwater had 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?

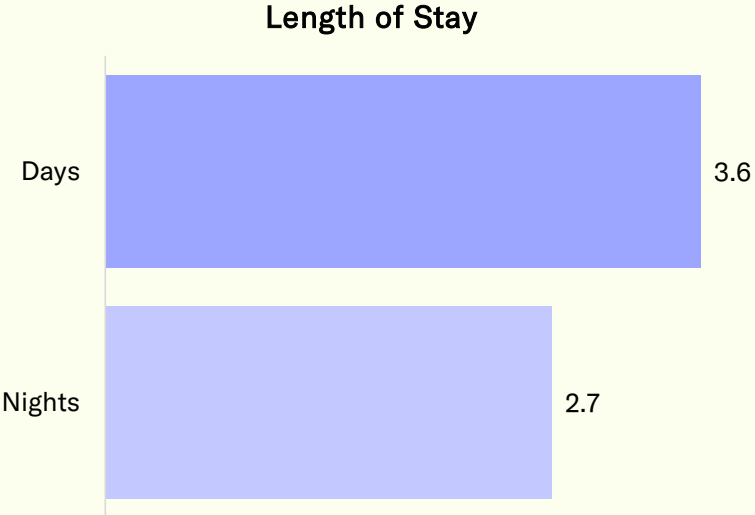
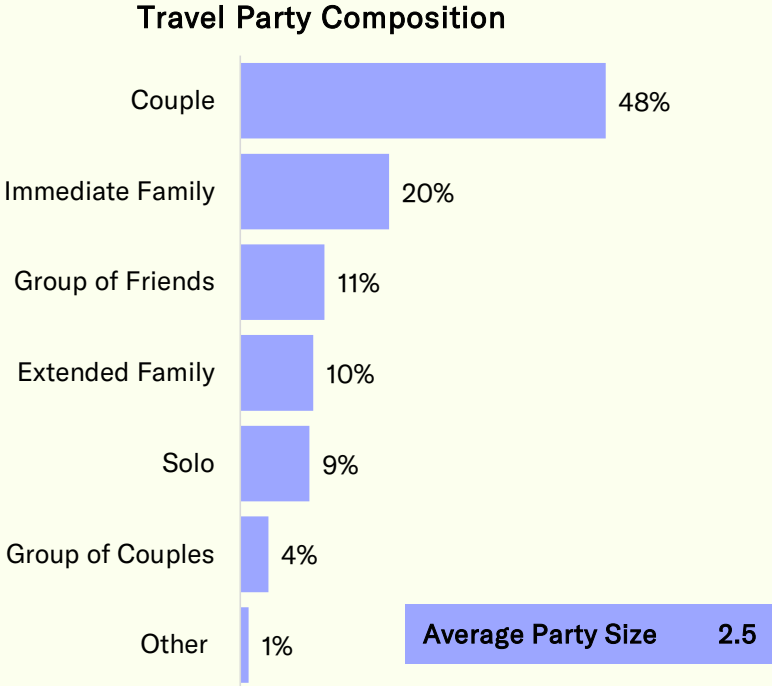
Base sizes: Total visitors (1148)

# 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 more than three (3) days and two (2) nights, on average.

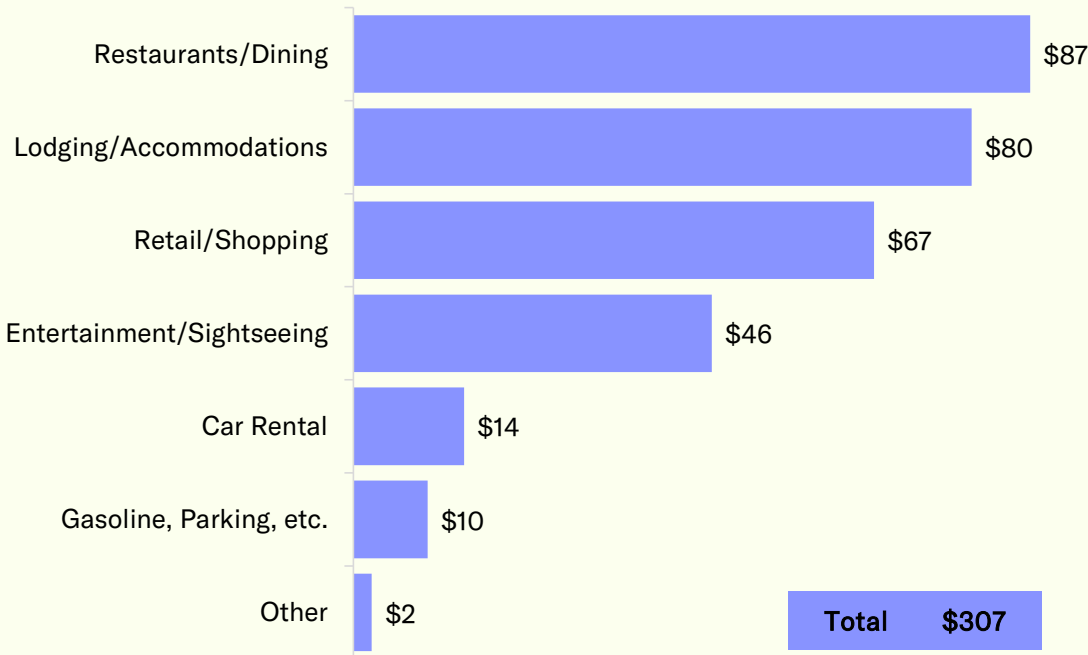


Question: Which best describes your travel group on this trip? Are you...?  
Question: How many people of each type are in your immediate travel party, including yourself?  
Question: How many total days and nights did you, or will you, stay in the St. Pete/Clearwater area on this trip?  
Base sizes: Total visitors (1146-1148)

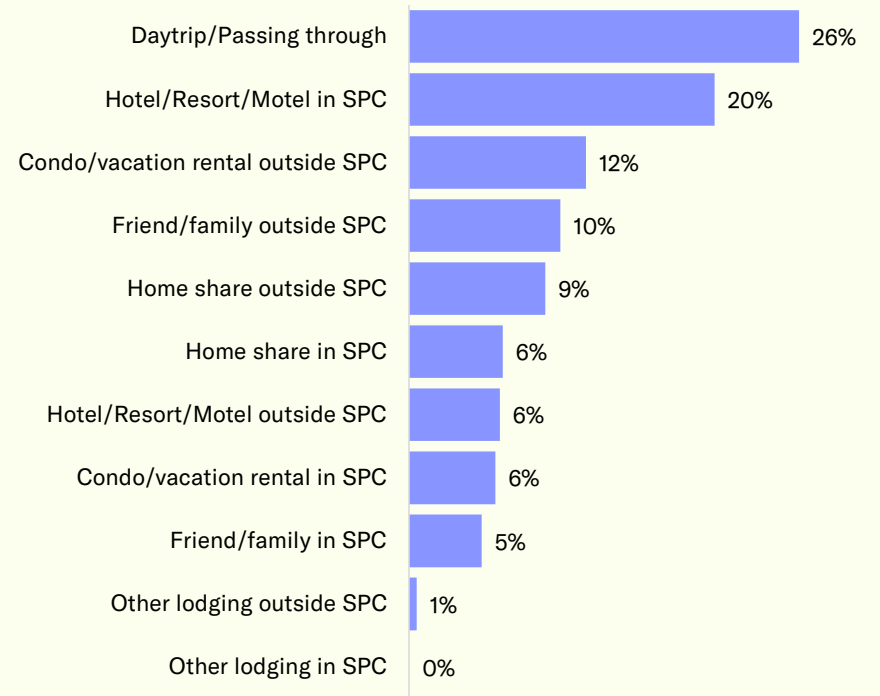
# Visitors spent an average of \$307 per day, with restaurants/dining and lodging/accommodations being the largest expenses.

Staying in a hotel/resort/motel in St. Pete/Clearwater was the most used accommodation.

Average Daily Spend per Party



Lodging/Accommodations



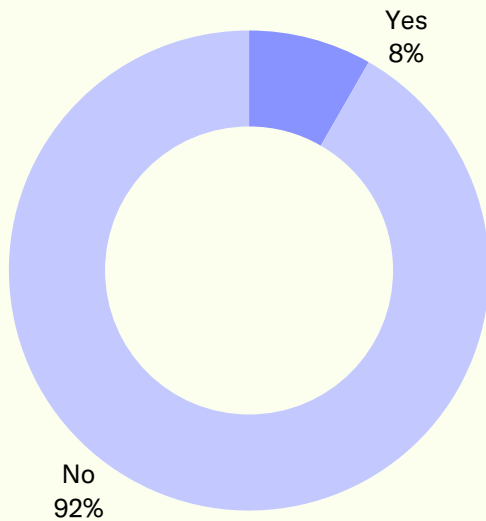
Question: PER DAY, approximately how much will you spend on each of the following while in the St. Pete/Clearwater area?

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

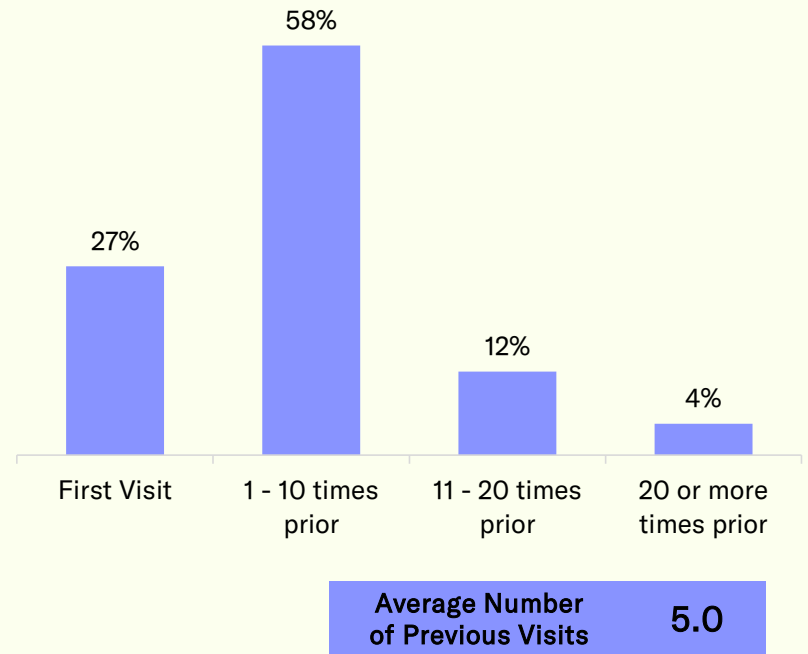
Base sizes: Total visitors (1082-1148)

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

First Visit to Florida



Previous Visitation to St. Pete/Clearwater



Question: Is this your first visit to Florida

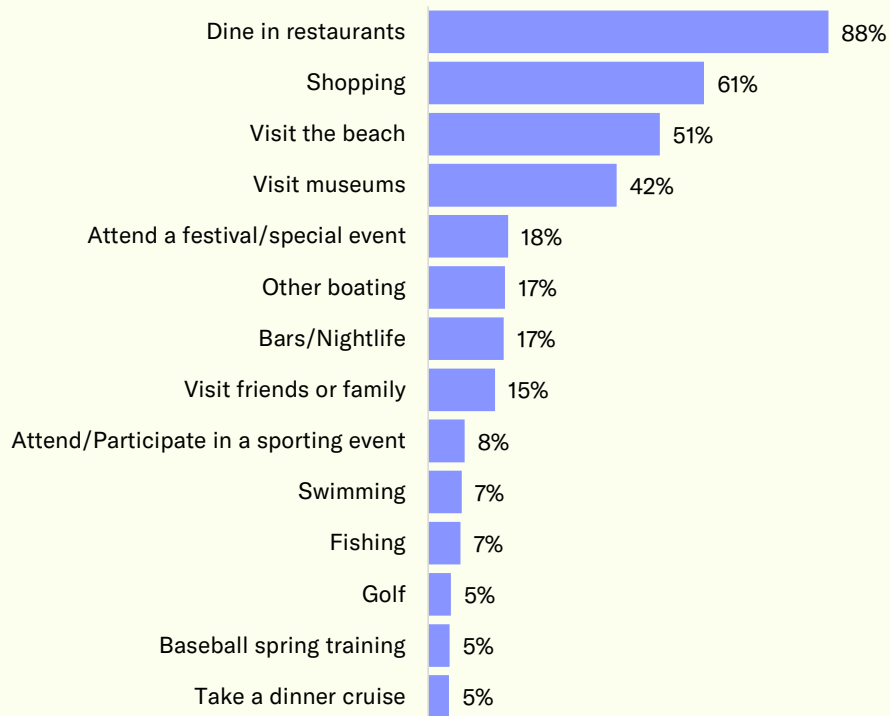
Question: How did you arrive to the St. Pete/Clearwater area and how will you leave? (Select all that apply)

Base sizes: Total visitors (1148) | Previously visited Florida (1064)

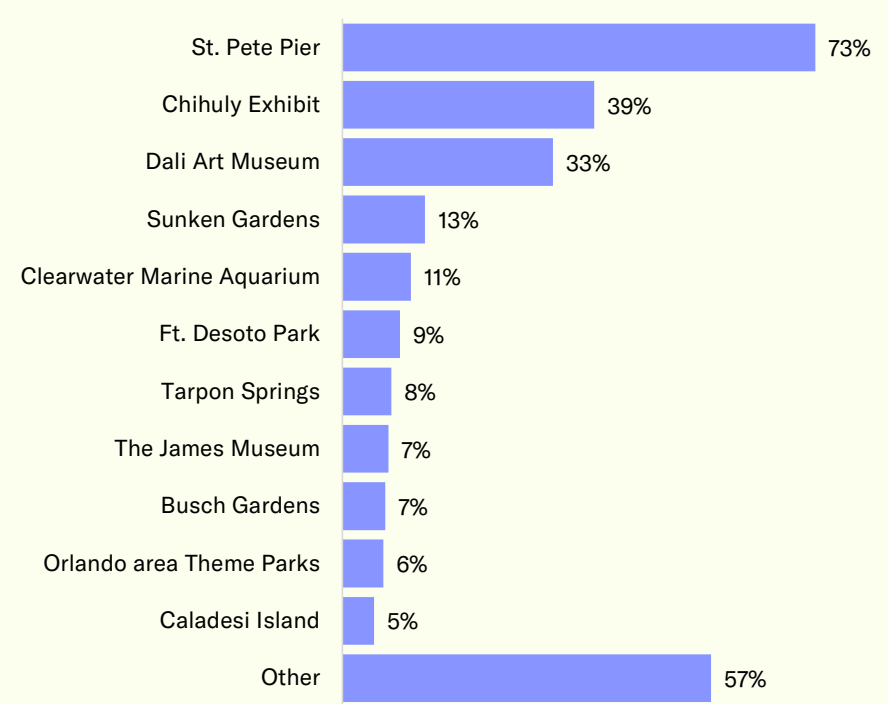
# Most visitors dined in restaurants, while shopping, visiting the beach and visiting museums were also popular activities.

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

**Trip Activities**



**Attractions Visited**



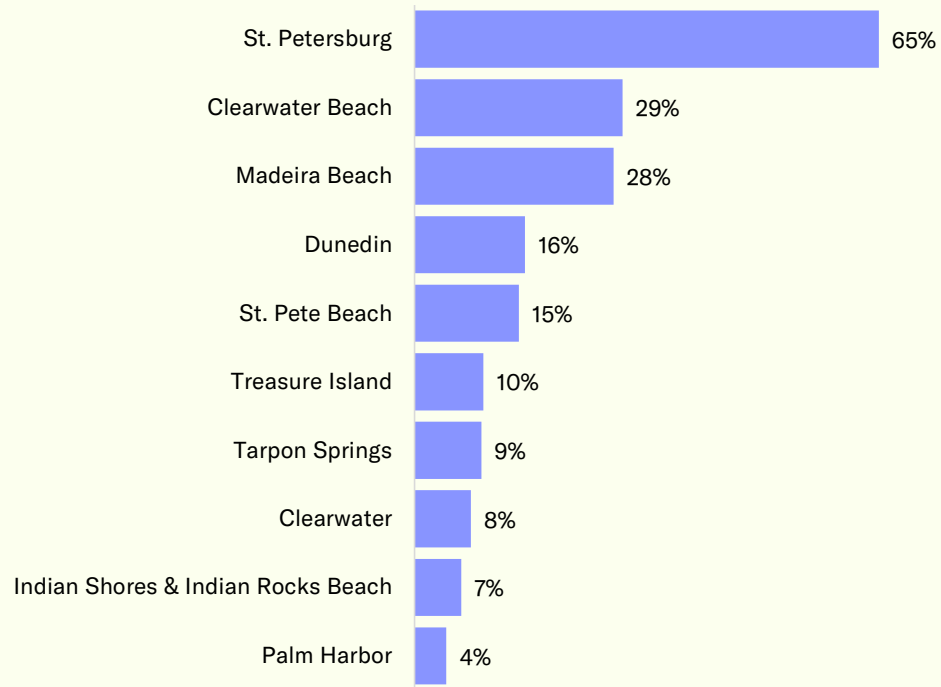
Question: Which of these activities did you, or will you, participate in while in the St. Pete/Clearwater area? (Select all that apply)

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

Base sizes: Total visitors (1148, excludes "None of these")

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

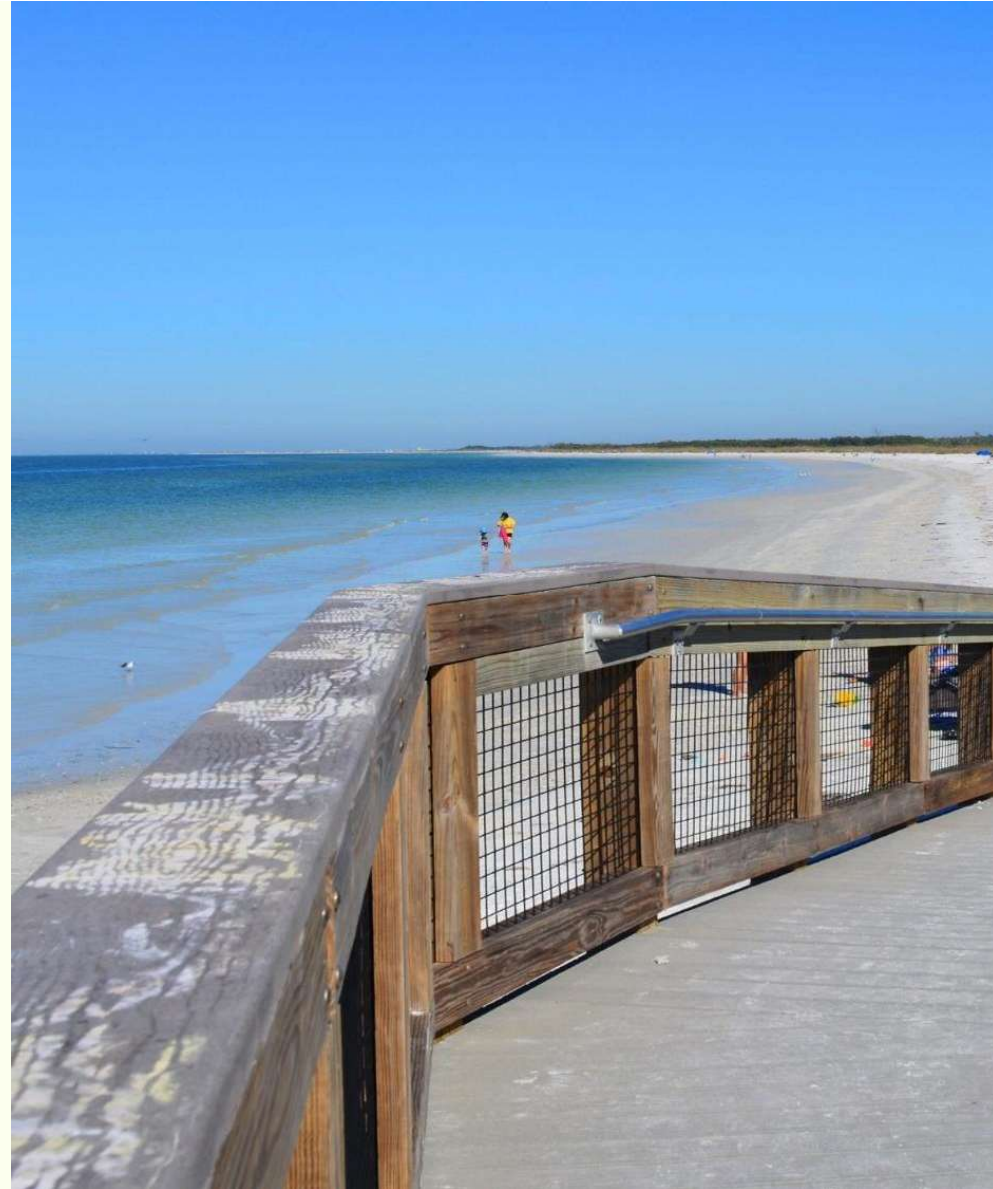
Communities Visited



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

Base size: Total visitors (1148)

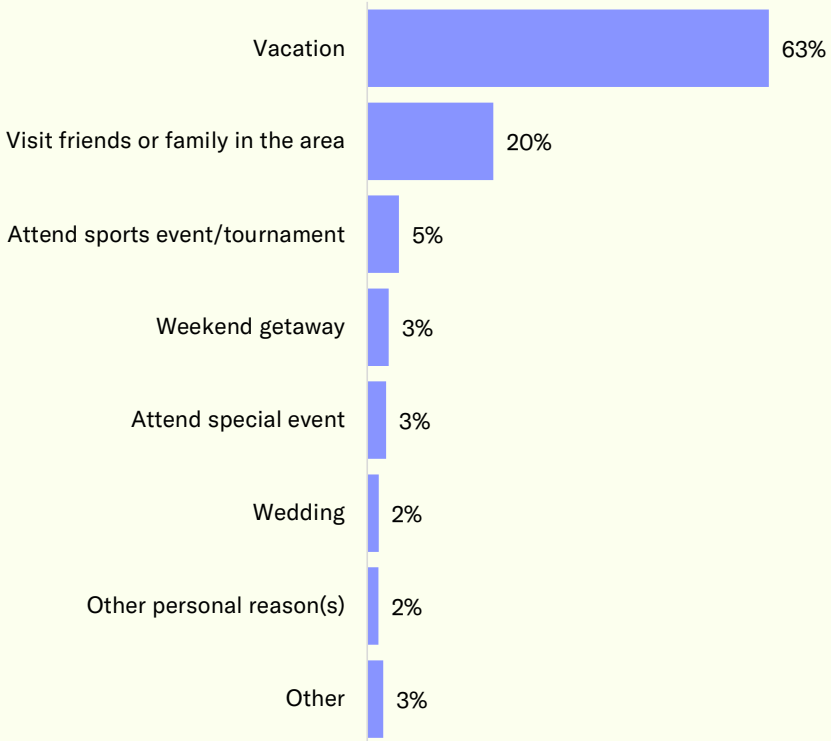
**Future Partners**



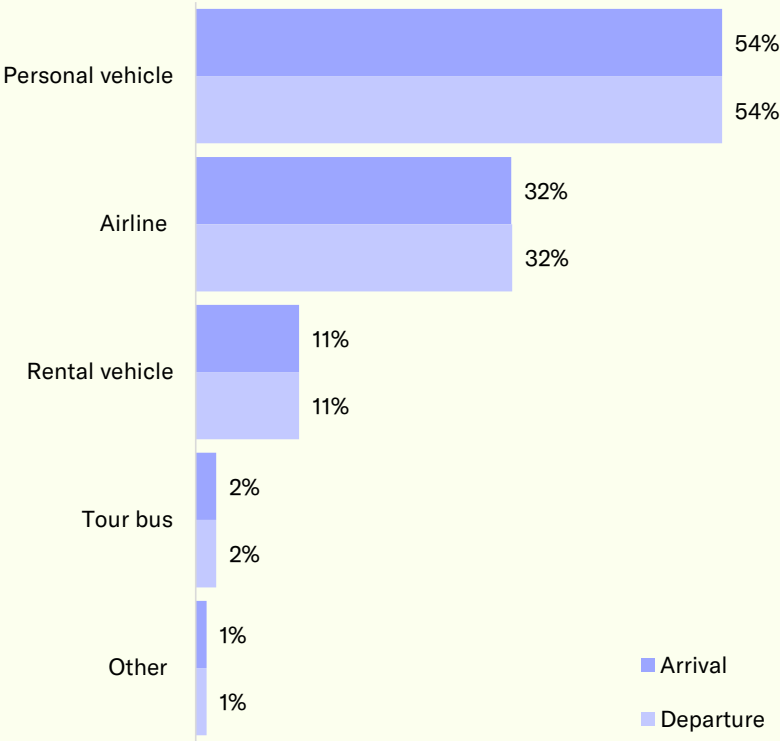
# Most visitors came to St. Pete/Clearwater for vacation.

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

Primary Reason for Visit



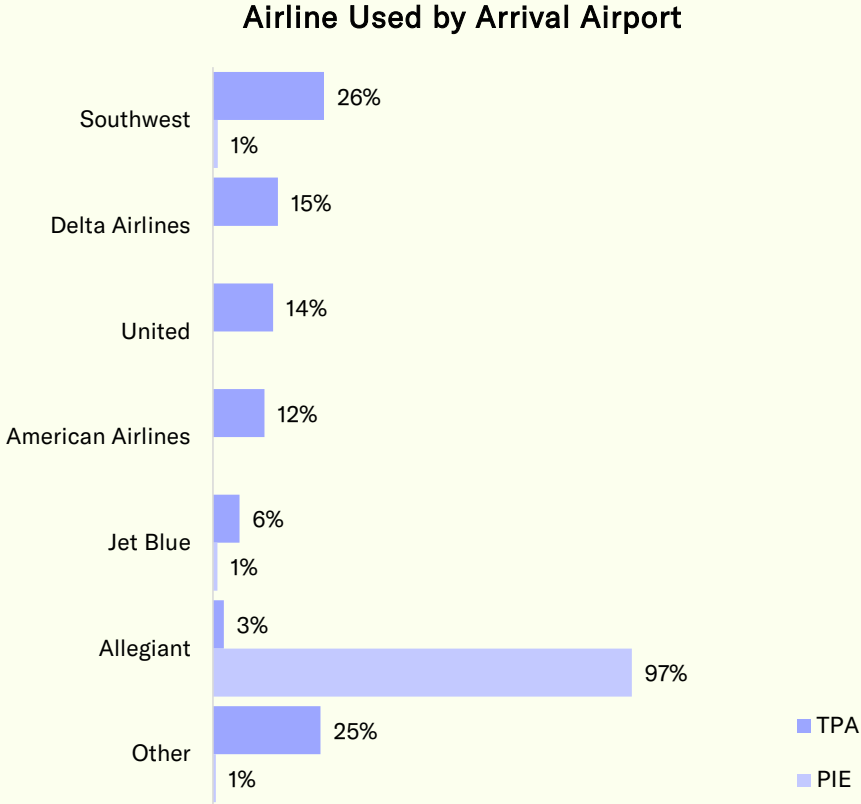
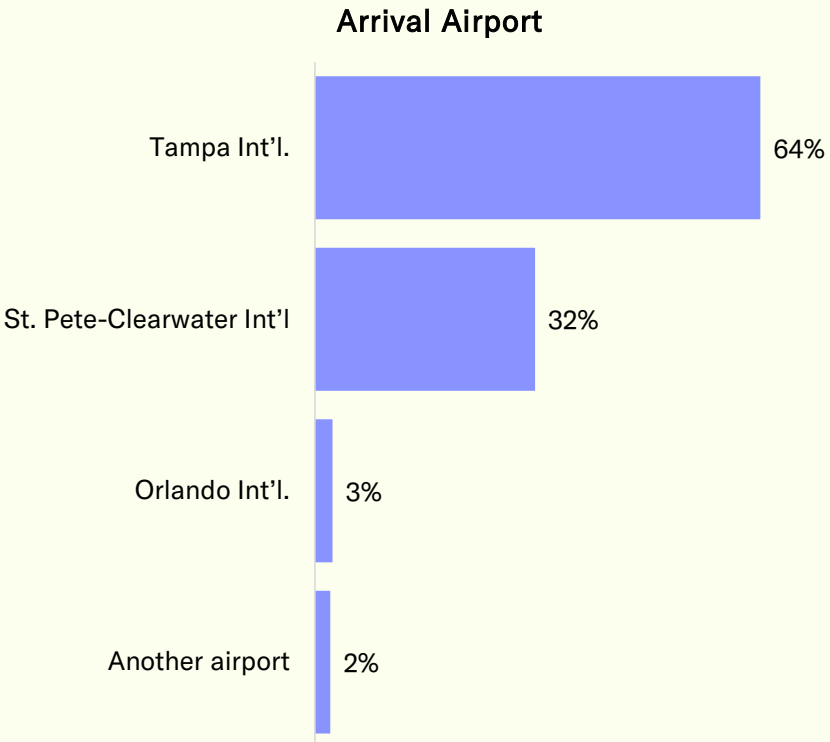
Method of Arrival & Departure



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 (1148)

# 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?

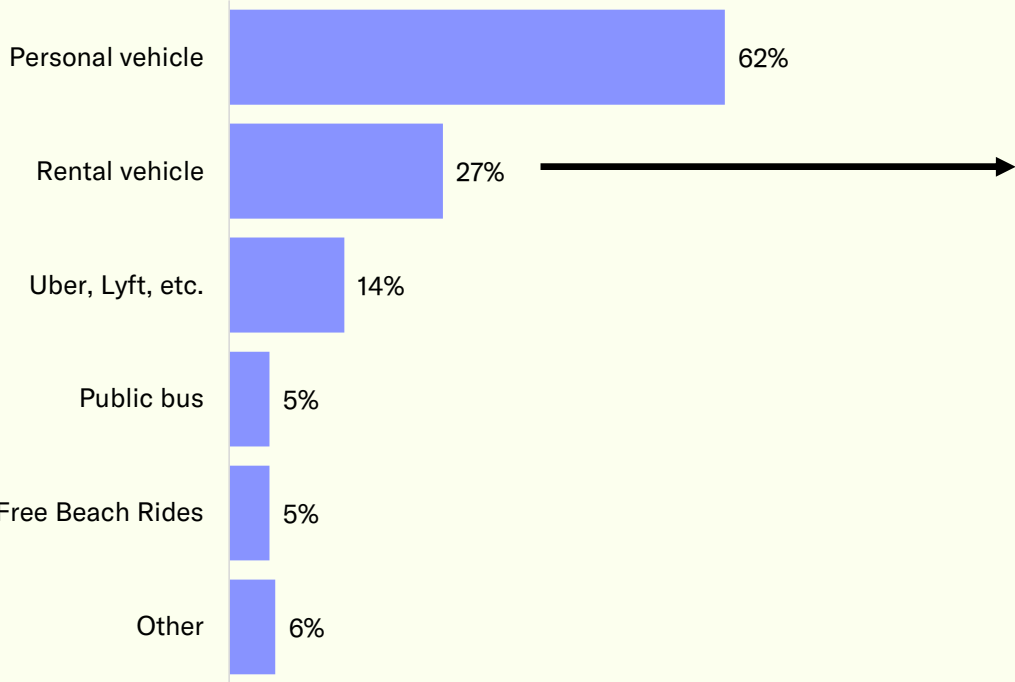
Question: Which airline did you use?

Base sizes: Visitors who arrived at the area by airplane (525) | Visitors who arrived in the area by airplane at TIA or PIE (331/173)

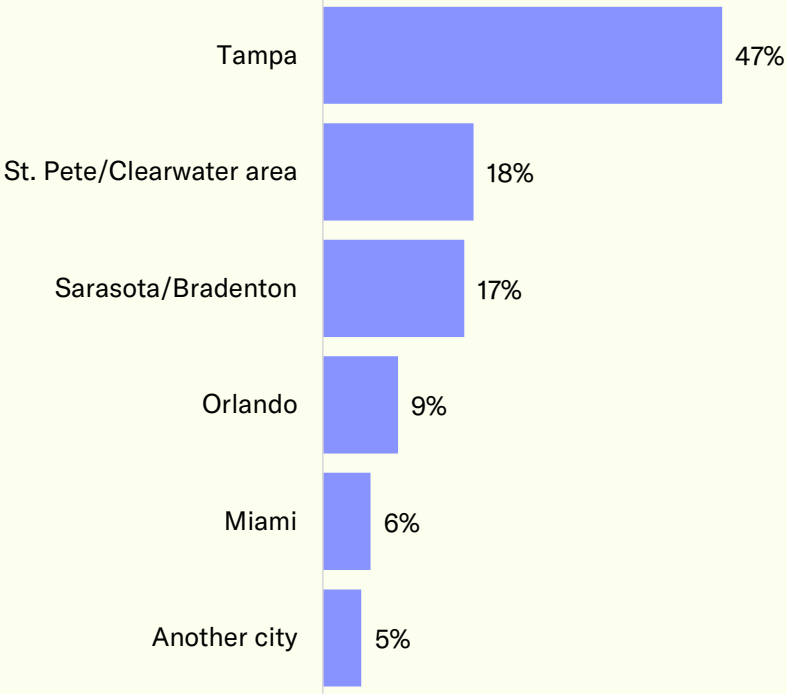
# Most visitors used their personal car/vehicle while in the area.

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

### In-Market Transportation Used



### Rental Car Pickup Location



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

Question: Which airline did you use?

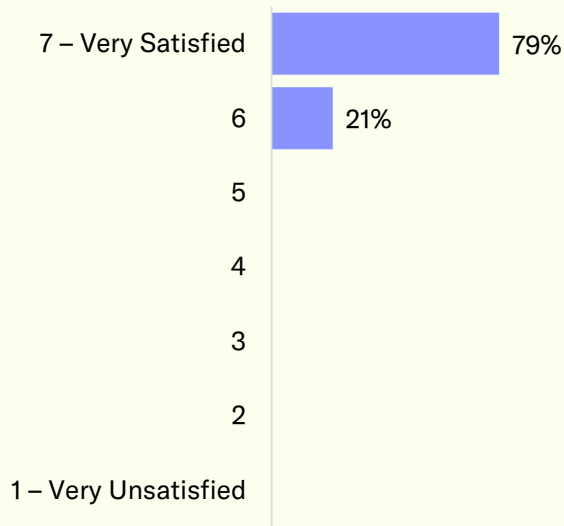
Base sizes: All visitors (1148) | Visitors who arrived in the area by rental car (323)



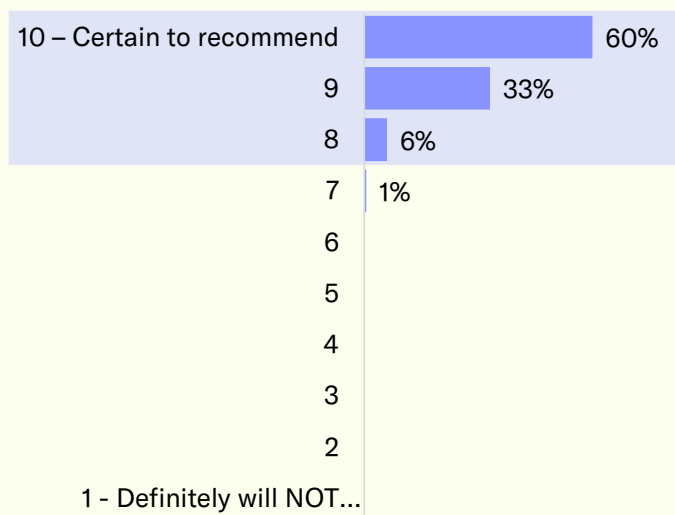
# Detailed Findings: Visitor Satisfaction

# 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.

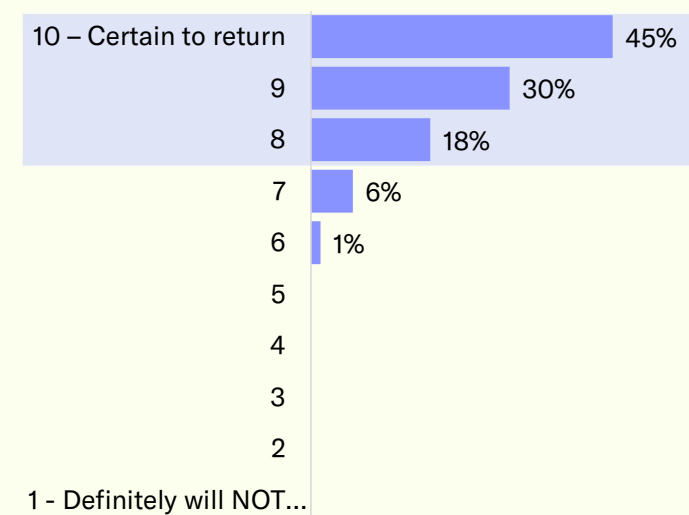
Satisfaction



Likelihood to Recommend



Likelihood to Return



Question: How satisfied are you with your experience in the St. Pete/Clearwater area on this trip?

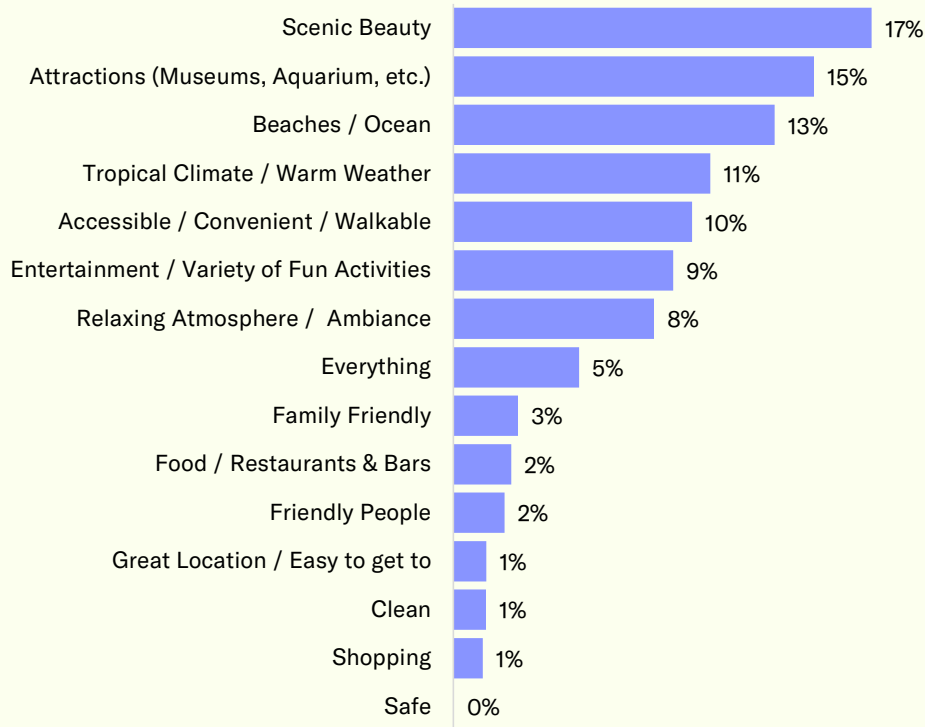
Question: How likely are you to recommend the St. Pete/Clearwater area as a place to visit to other travelers?

Question: How likely are you to return to the St. Pete/Clearwater area?

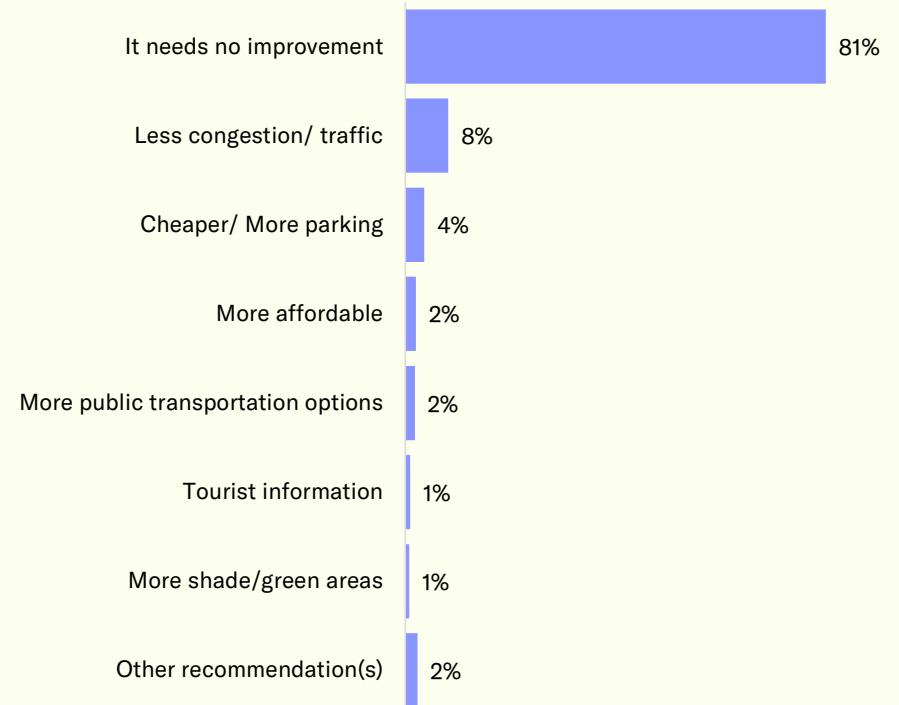
Base size: Total visitors (1148).

# 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)

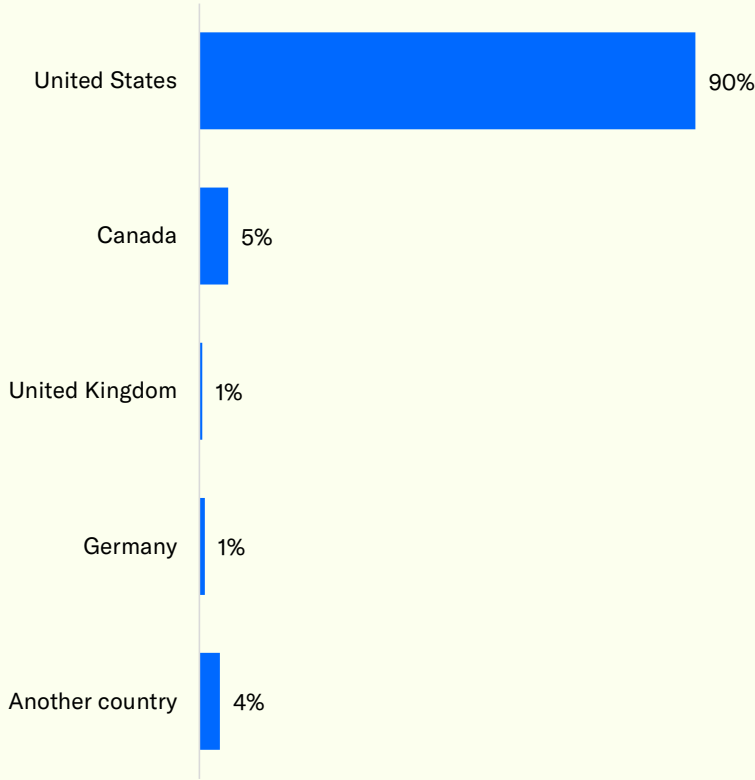
Question: In your opinion, what services or additional attractions would most enhance your experience in the St. Pete/Clearwater area? (Unaided)

Base sizes: Total visitors (1148)

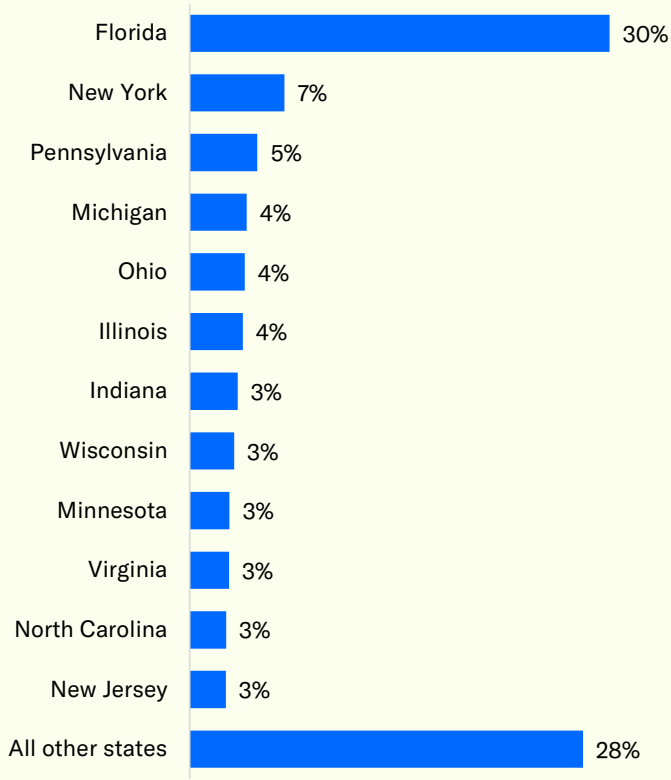
# Demographics

# Origin Market

Country of Origin

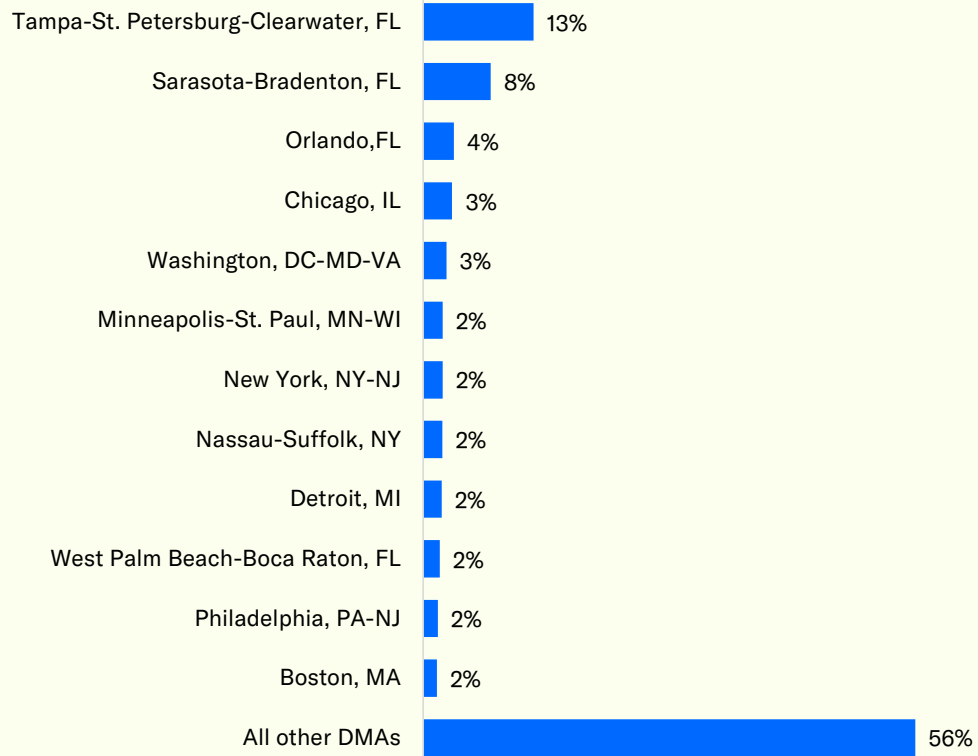


U.S. State of Origin

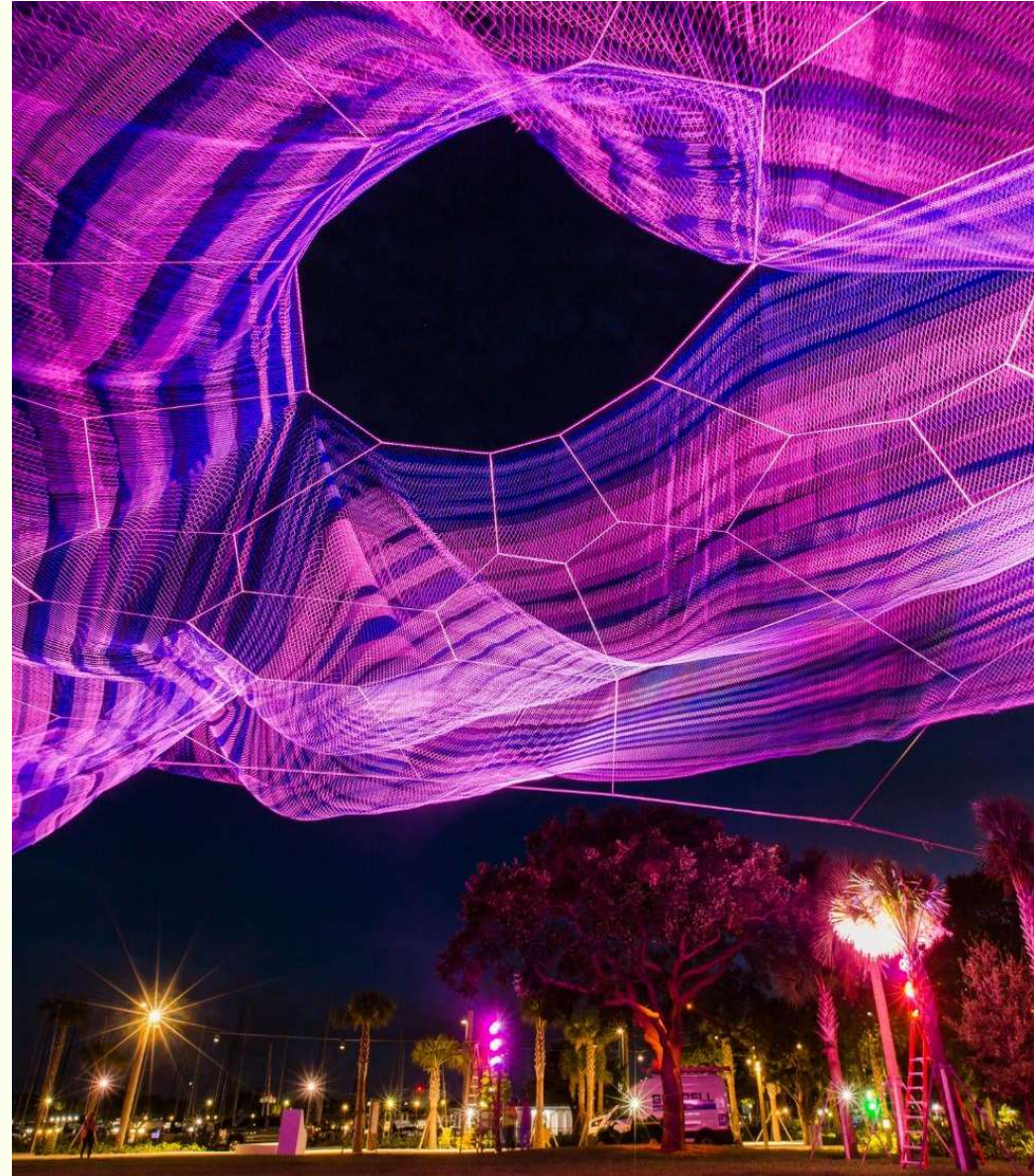


# Origin Market

## MSA of Origin



## Future Partners

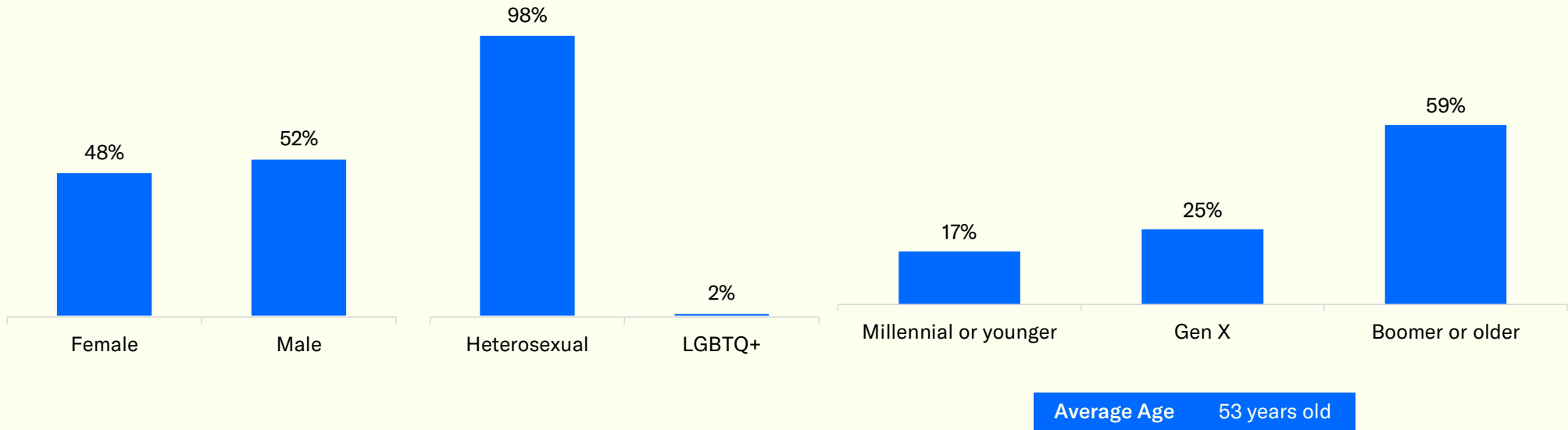


# Demographics

Gender

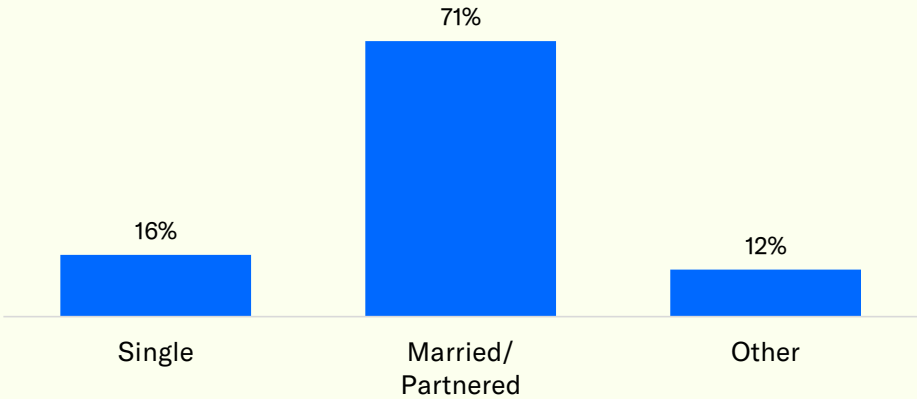
Orientation

Generation



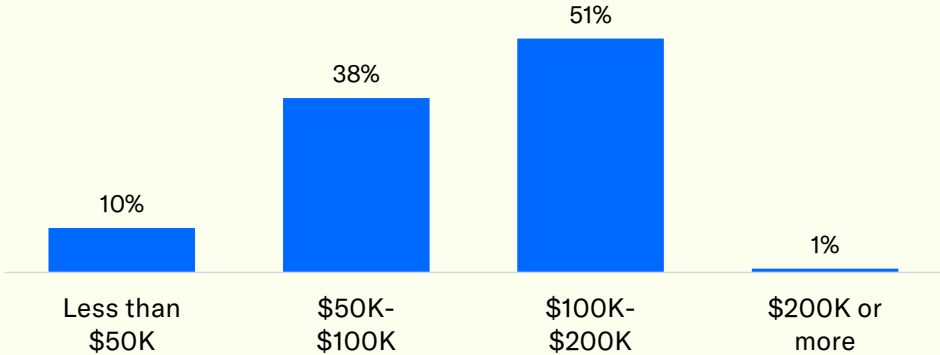
# Demographics

Marital Status



Children in Household 15%

Household Income



Average HHI \$104,327

## Future Partners



# Demographics

Ethnicity/Racial Identity

