

**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 Fiscal Year 2024 findings for the visitor profile research.

**Future Partners**



# Methodology & Analysis

In total, 4,977 completed surveys from Pinellas Co. visitors were collected from October 2023 through September 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 - Fiscal Year 2024

Visitors to Pinellas Co.   
**15.4 Million**

Direct Visitor Spending   
**\$6.8 Billion**

Total Economic Impact   
**\$11.2 Billion**

Total Tax Revenues   
**\$429 Million**

 Hotel Room Nights  
**6.4 Million**

 Tourism Industry Payroll  
**\$3.5 Billion**

 Jobs Supported  
**Over 100,000**

## Economic Impact Estimates - by Fiscal Year

The visitor volume to St. Pete-Clearwater in the Fiscal Year 2024 is estimated to total 15,404,744. Additionally, it is estimated that visitors to the area during this timeframe generated almost \$6.8 billion in direct spending and almost \$429 million in total tax revenue for Pinellas Co.

	Fiscal Year 2021	Fiscal Year 2022	Fiscal Year 2023	Fiscal Year 2024
Visitors to Pinellas Co.	14,501,643	15,714,730	15,857,633	15,404,744
Direct Visitor Spending in Pinellas Co.	\$5,013,680,057	\$6,581,648,115	\$6,599,186,588	\$6,793,346,679
Total Economic Impact of Tourism to Pinellas Co.	\$8,160,456,573	\$10,837,656,523	\$10,936,819,326	\$11,200,374,410
Total Tax Revenue Generated for Pinellas Co.	\$316,769,955	\$413,998,708	\$424,022,211	\$428,948,255
Hotel Room Nights	5,611,093	6,575,705	6,666,187	6,443,377
Tourism Industry Payroll	\$2,609,769,009	\$3,473,234,958	\$3,461,142,913	\$3,542,730,162
Jobs Supported	81,686	107,136	105,814	108,688

## Tax Revenue Estimates - by Fiscal Year

Visitors to the area accounted for almost \$429 million in total tax revenue for Pinellas Co., with hotel tax/TDT collections representing almost \$97 million in tax revenue.

	FY 2021	FY 2022	FY 2023	FY 2024
<b>Tax Revenue Generated for Pinellas Co.</b>	<b>\$316,769,955</b>	<b>\$413,998,708</b>	<b>\$424,022,211</b>	<b>\$428,948,255</b>
Hotel Tax/TDT	\$72,578,495	\$94,680,532	\$97,066,224	\$96,640,058
Sales Tax	\$45,901,287	\$59,934,817	\$61,458,745	\$62,464,812
Property Tax	\$198,290,172	\$258,913,991	\$265,497,242	\$269,843,385

# Economic Impact Estimates - by Visitor Type & Spending Category

FY 2024 Oct 2024 - Sept 2023		
	Visitors	Direct Spend
Hotel/ Motel/ B&B	3,483,880	\$3,384,363,606
Friends/ Relatives (VFR)	588,758	\$331,201,704
Vacation Rental/Home Share	1,797,373	\$1,964,590,371
Day Trip (Regional)	5,138,699	\$543,730,661
Day Trip (Traveler)	4,319,460	\$540,137,563
Other	76,572	\$29,322,775
<b>Total Visitors</b>	<b>15,404,743</b>	<b>\$6,793,346,679</b>

FY 2024 Oct 2024 - Sept 2023	
	Direct Spend
Lodging/ Accommodations	\$2,386,775,401
Restaurants/ Dining	\$1,991,431,955
Retail/ Shopping	\$1,100,338,764
Entertainment/ Sightseeing	\$820,234,066
Local Transportation	\$189,077,540
Car Rental	\$269,831,153
Other	\$35,657,799
<b>Total Direct Spending</b>	<b>\$6,793,346,679</b>

# Economic Impact & Tax Revenue: Definitions

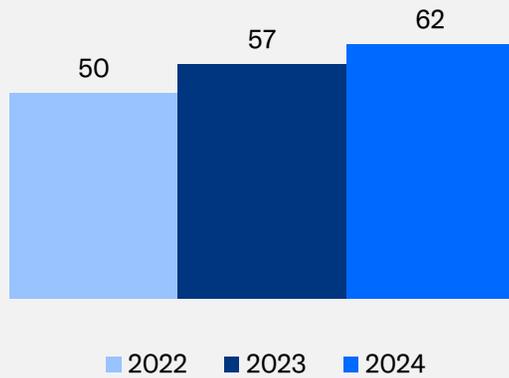
The following definitions, as they relate to economic impact, are used throughout this report:

- **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

## Average Days Between Decision to Visit & Arrival



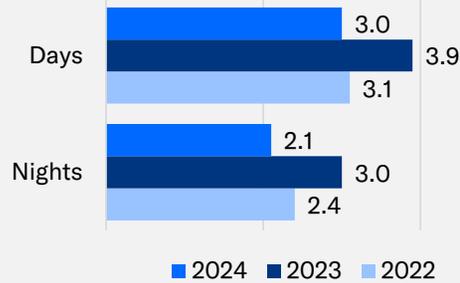
## Travel Party Size



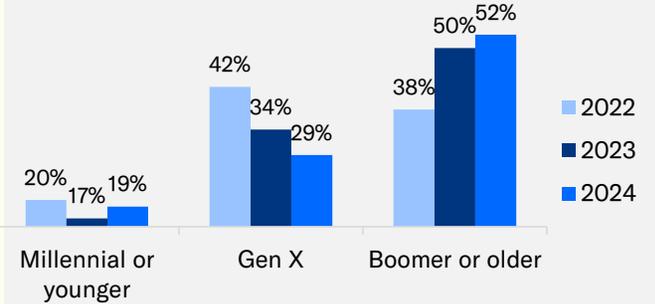
**2.6**

2023	2.5
2022	2.6
2024	2.6

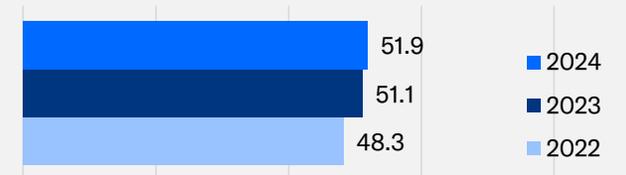
## Average Days & Nights



## Generation



## Average Age



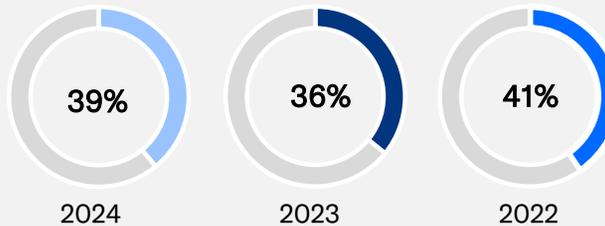
## Average Daily Spending Per Travel Party



**\$301**

2023	\$298
2022	\$290
2024	\$301

## Overnight in Pinellas Co.



## Average Household Income

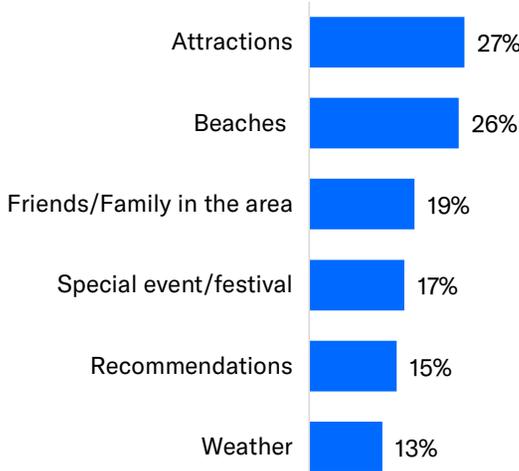
**\$102,926**

2023	\$85,389
2022	\$108,500
2024	\$102,926

# Visitor Summary: Generations

# Millennial Travelers

## Important Factors for Destination Selection



## Average Daily Spending Per Person



**\$274**

## Travel Party Size



**2.6**

15% traveled with children

## Average Length of Stay



**2.4** days

## Top Activities

-  Dining out - 84%
-  Shopping - 45%
-  Visiting the beach - 43%
-  Swimming/ Museums - 36%

## International Visitation



## Origin States

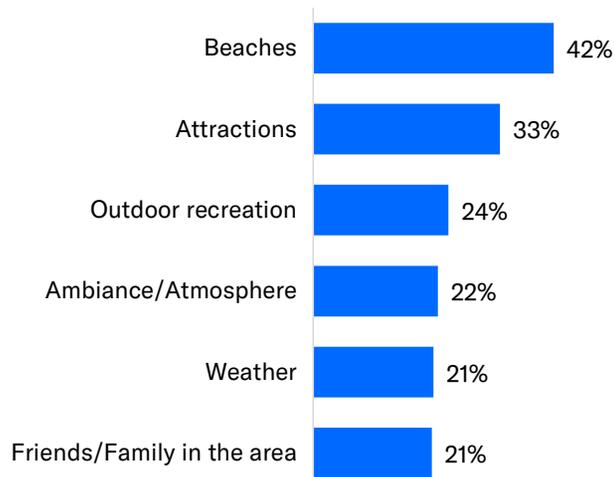


## Communities Visited



# Generation X Travelers

## Important Factors for Destination Selection



## Average Daily Spending Per Person



**\$340**

## Travel Party Size



**2.9**

26% traveled with children

## Average Length of Stay



**3.3** days

## Top Activities



Dining out - 89%



Visiting the beach - 58%

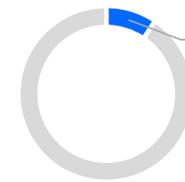


Shopping - 40%



Visiting museums - 34%

## International Visitation



International  
9%

## Origin States



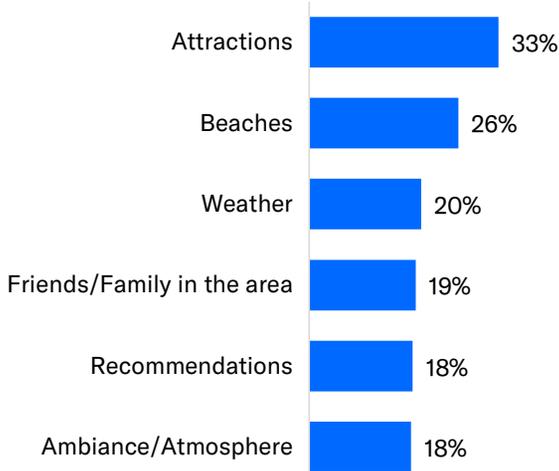
## Communities Visited



St. Petersburg	60%
Clearwater Beach	35%
Madeira Beach	29%
St. Pete Beach	15%
Dunedin	13%

# Boomer Travelers

## Important Factors for Destination Selection



## Average Daily Spending Per Person



**\$292**

## Travel Party Size



**2.5**

3% traveled with children

## Average Length of Stay



**3.1** days

## Top Activities



Dining out - 90%



Shopping - 63%

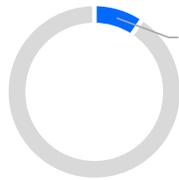


Visiting museums - 47%



Visiting the beach - 42%

## International Visitation



International  
9%

## Origin States



## Communities Visited



St. Petersburg - 68%  
 Madeira Beach - 29%  
 Clearwater Beach - 20%  
 Dunedin - 12%  
 St. Pete Beach - 12%

# Detailed Findings: Trip Planning

# Visitors made the decision to visit St. Pete-Clearwater two months prior to arrival.

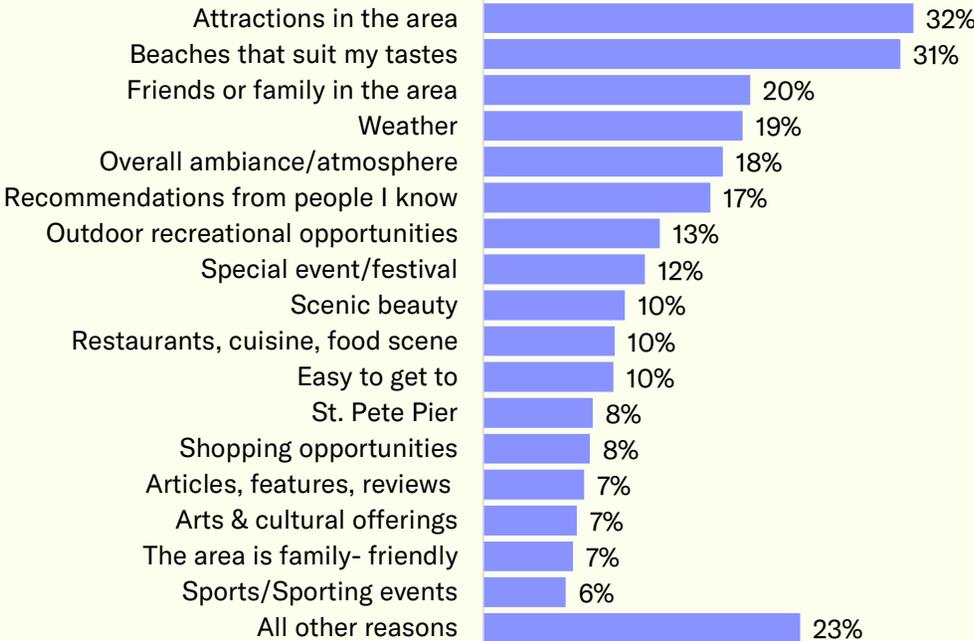
Attractions, beaches, friends/family in the area, and weather were the most important factors in the decision to visit St. Pete-Clearwater.

### Decision-making Timeframe



**62 days prior to visiting**

### 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?

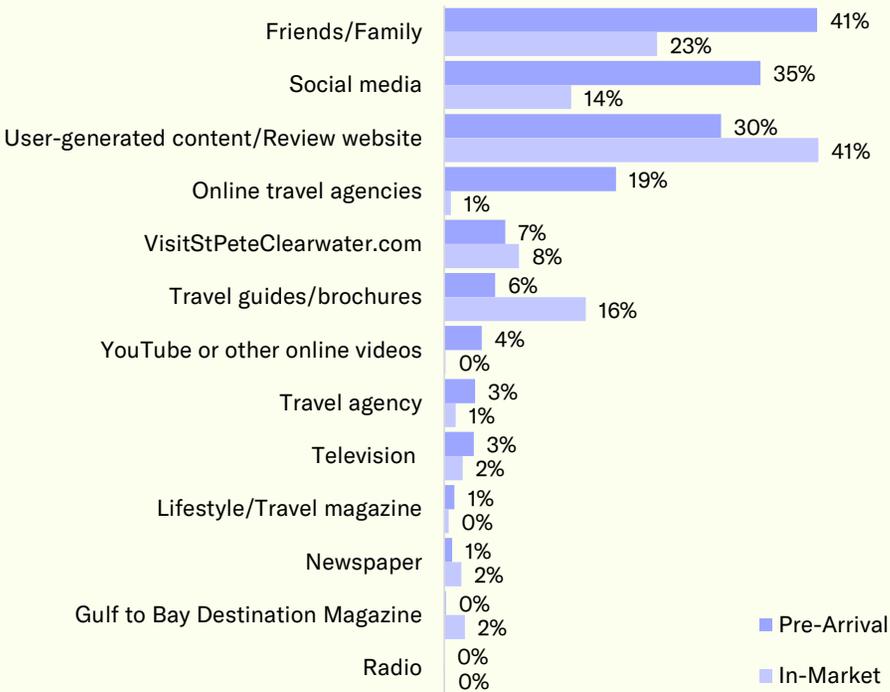
Question: Which of the following were IMPORTANT to your decision to take this trip to the St. Pete/Clearwater area? (Select all that apply)

Base sizes: Total visitors (4977)

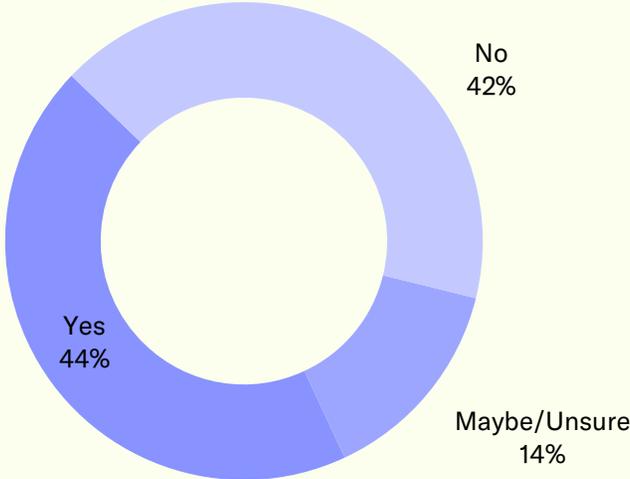
# Friends/Family were the most used resource before arriving in St. Pete-Clearwater, while review websites were used most in market.

Almost half of all visitors have 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.)

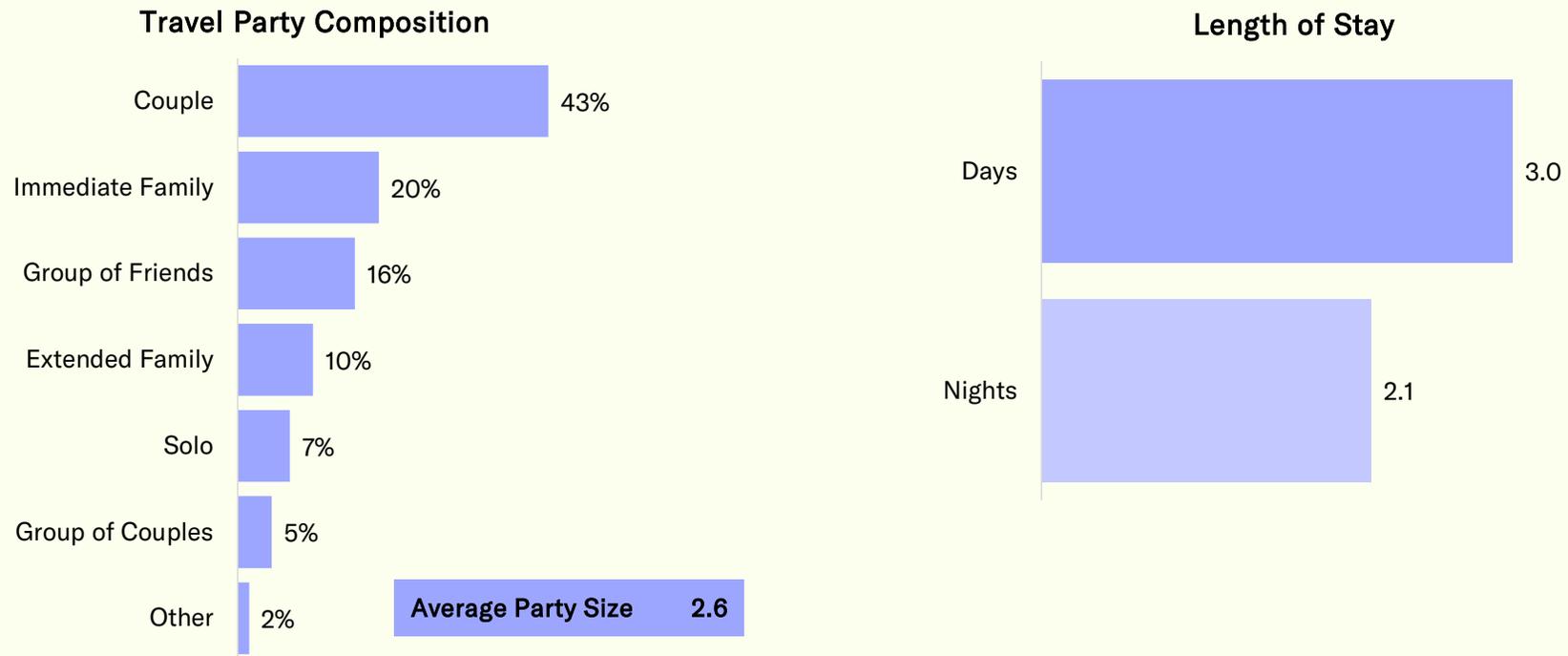
Question: In the last six months, have you seen, read, or heard any travel stories, advertising, or promotions for the St. Pete/Clearwater area?

Base sizes: Total visitors (4977)

# Detailed Findings: Trip Details

# Most visitors came to St. Pete-Clearwater as a couple, with an average party size between two (2) and three (3) people.

Visitors stayed over three (3) days and two (2) nights in St. Pete-Clearwater , 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?

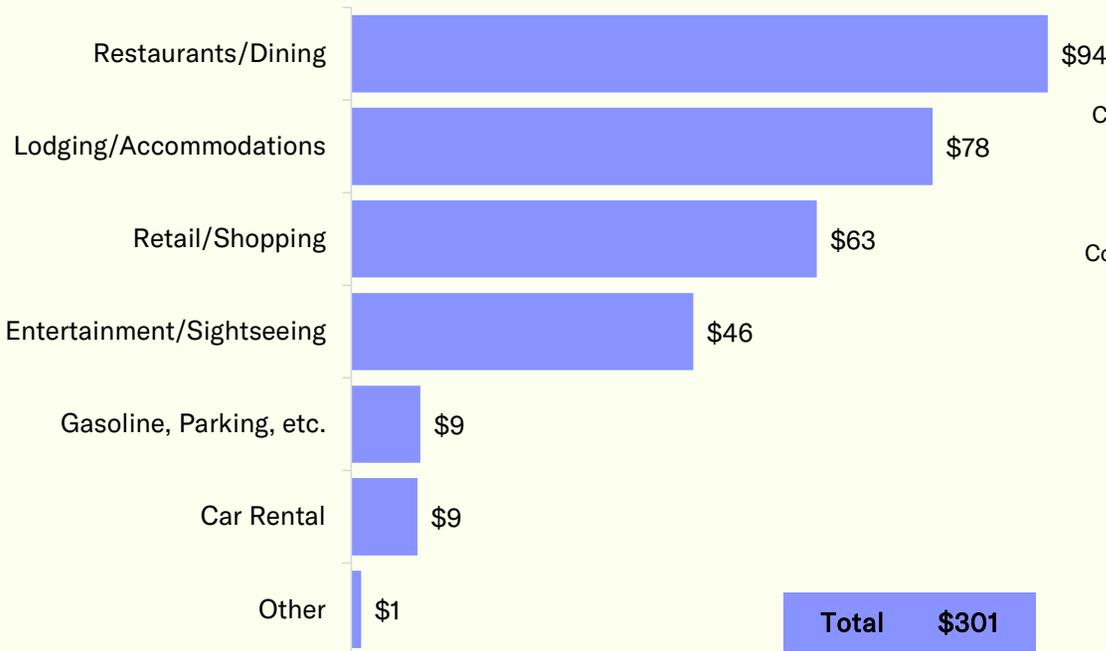
Question: How many total days and nights did you, or will you, stay in the St. Pete/Clearwater area on this trip?

Base sizes: Total visitors (4740-4977)

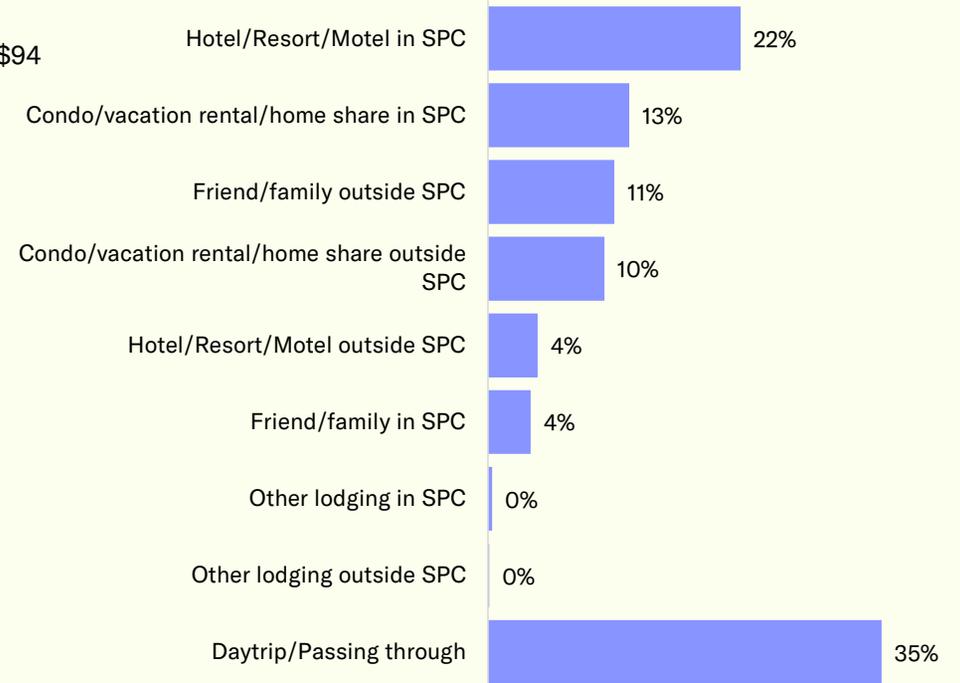
# Visitors spent an average of \$301 per day, with restaurants/dining and lodging/accommodations being the largest expenses.

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

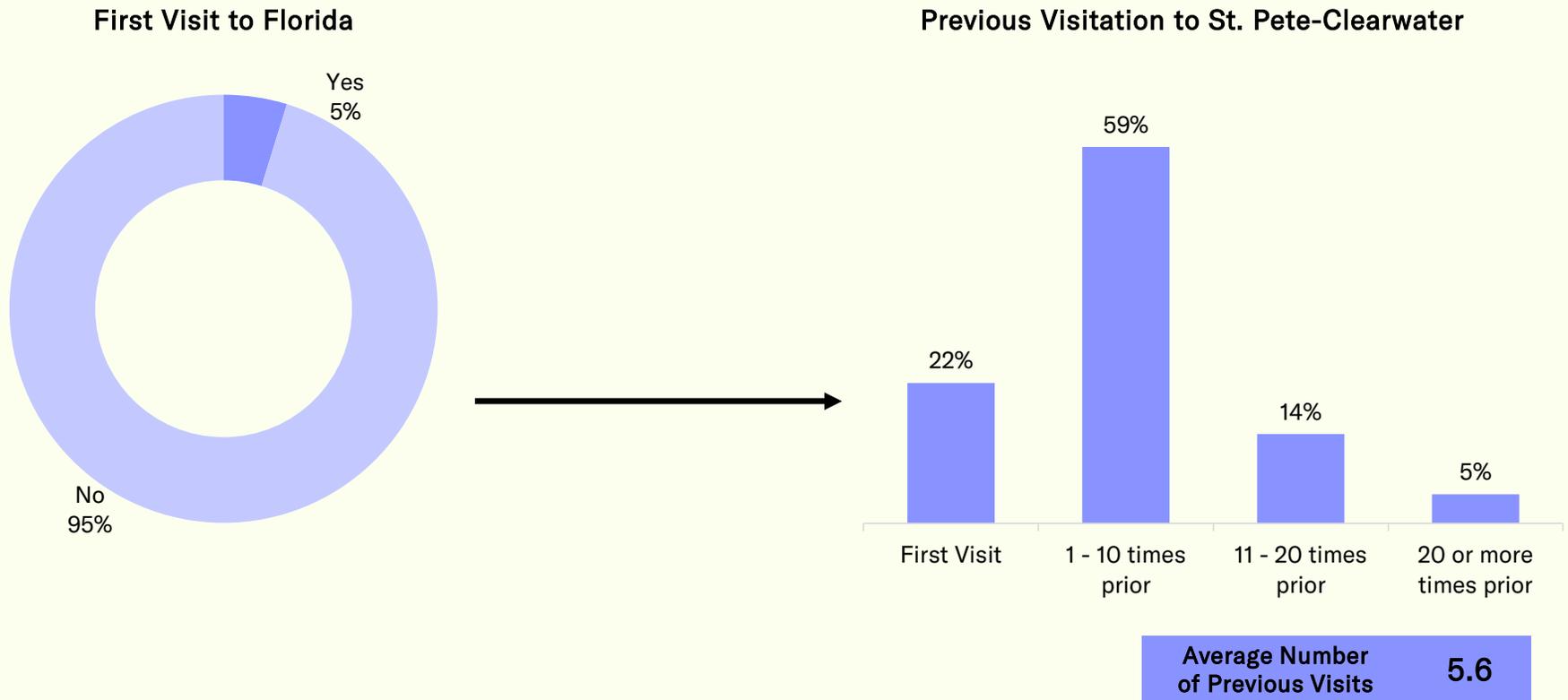


Question: PER DAY, approximately how much will you spend on each of the following while in the St. Pete/Clearwater area?

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

Base sizes: Total visitors (4841-4977)

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



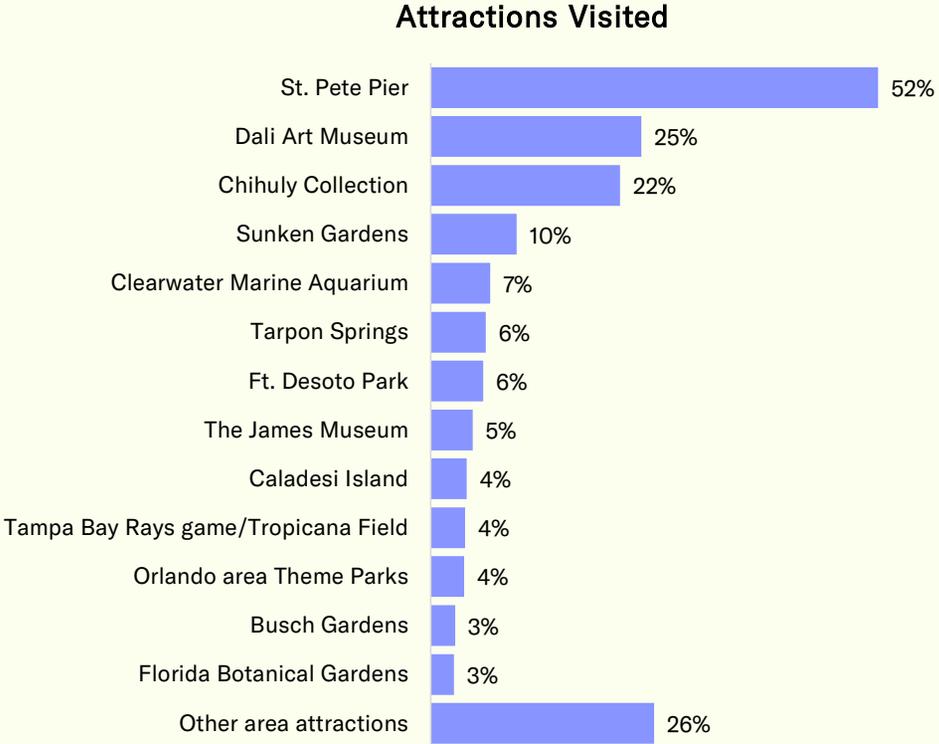
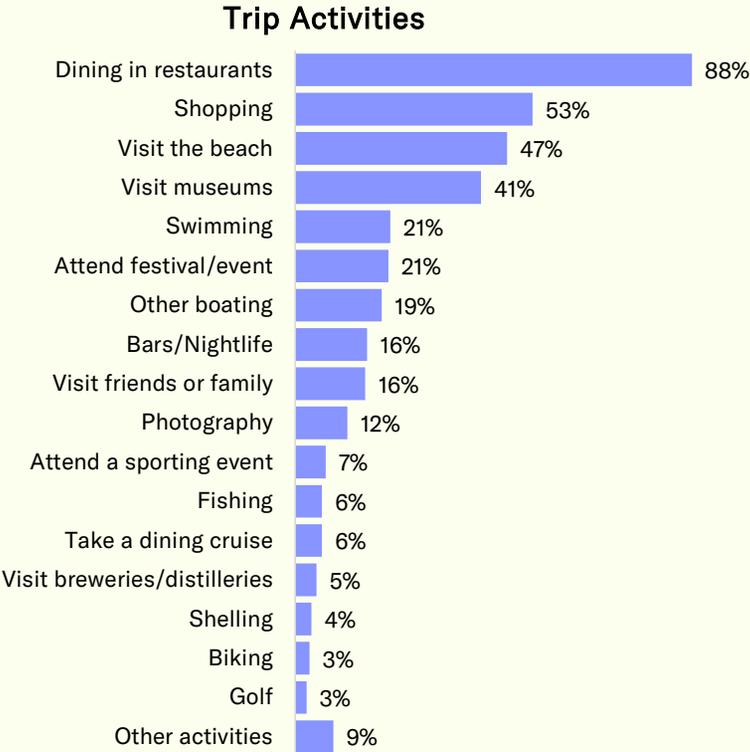
Question: Is this your first visit to Florida?

Question: Prior to this visit, how many times have you been to the St. Petersburg/Clearwater area?

Base sizes: Total visitors (4977) | Previously visited Florida (4799)

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

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



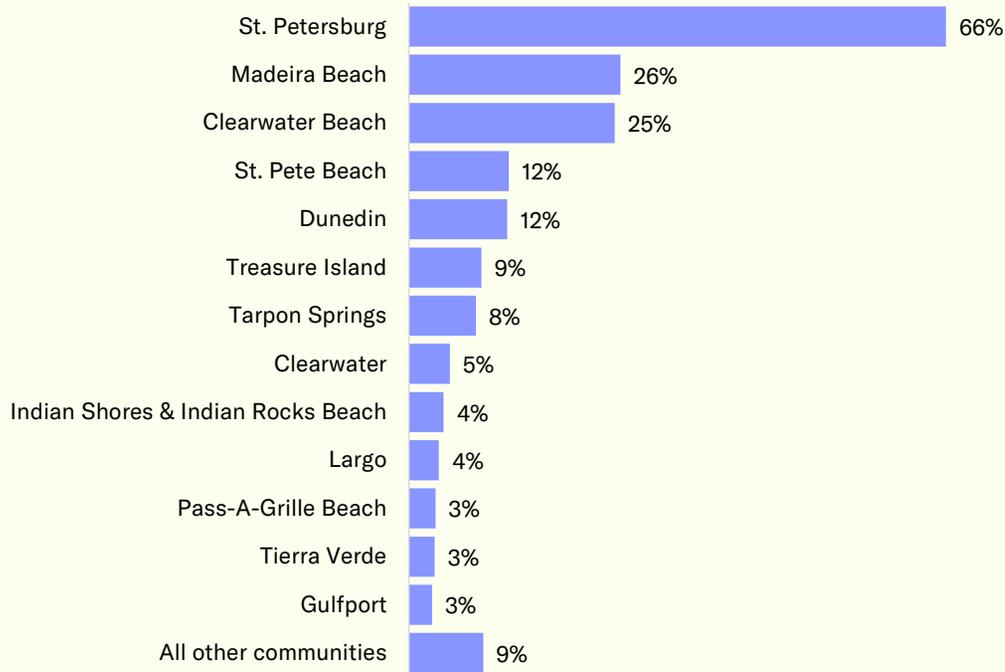
Question: Which of these activities did you, or will you, participate in while in the St. Pete/Clearwater area? (Select all that apply)

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

Base sizes: Total visitors (4977)

# St. Petersburg was the most visited area, followed by Madeira Beach and Clearwater 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 (4977)

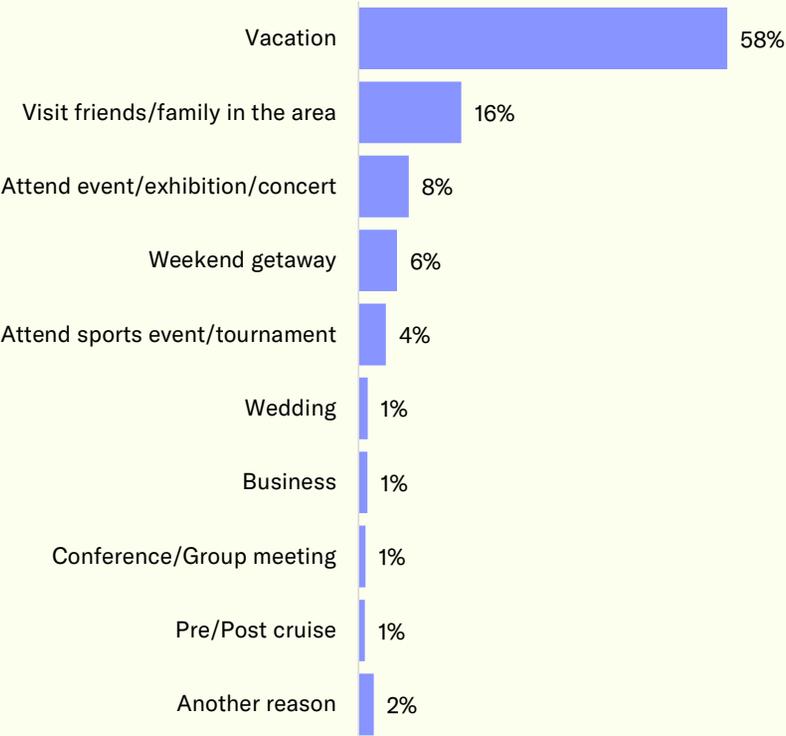
## Future Partners



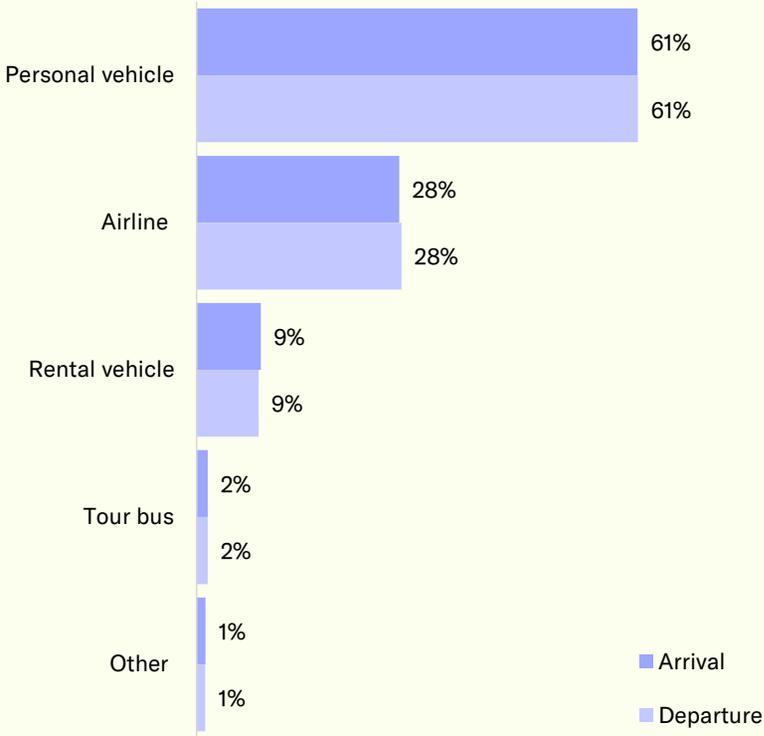
# Most visitors came to St. Pete-Clearwater for vacation.

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

Primary Reason for Visit



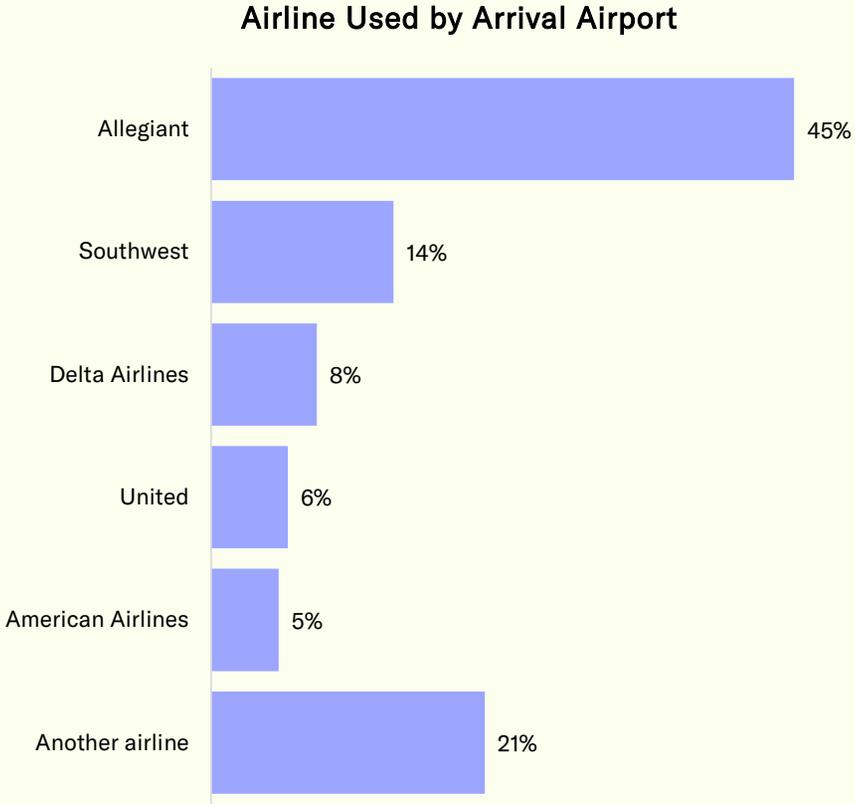
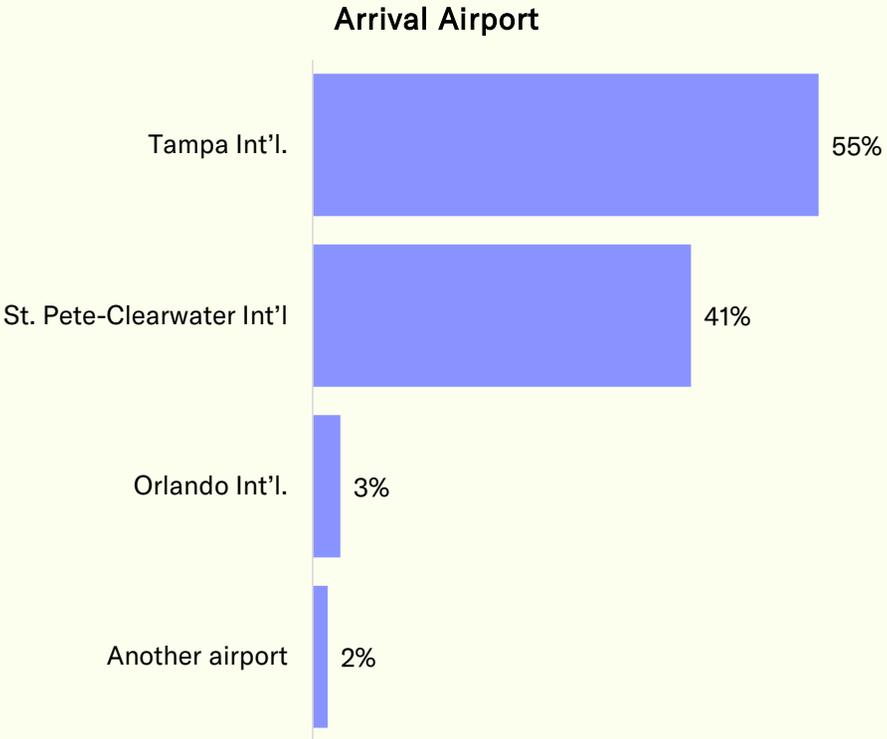
Method of Arrival & Departure



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 (4977)

# Most visitors who flew into the area used TPA.

A number of airlines were used by those who flew into TPA or PIE, with Allegiant being the most popular.

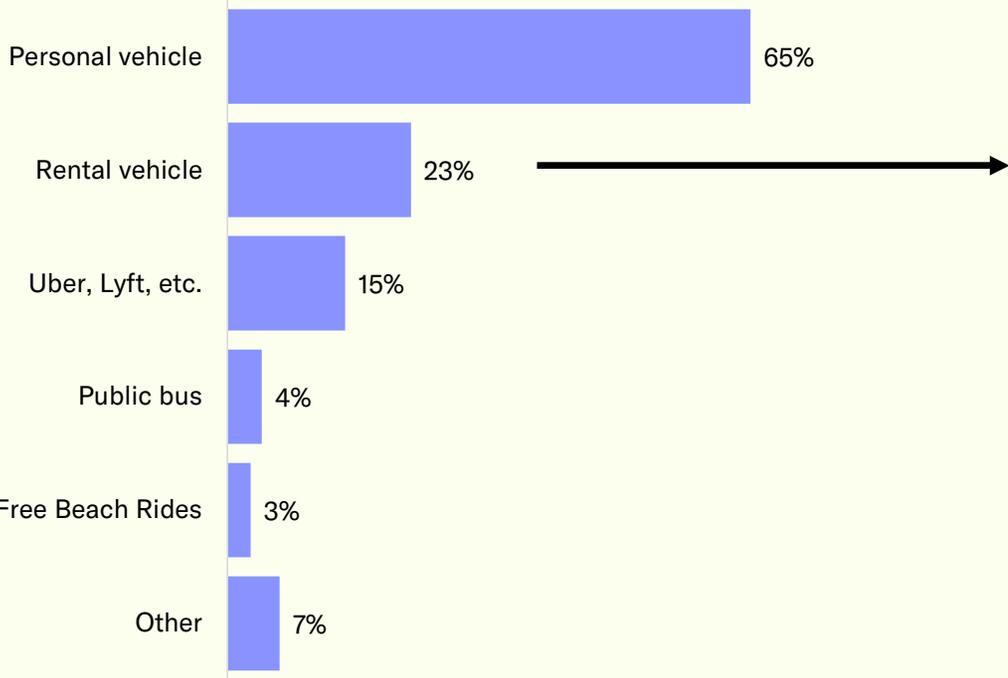


Question: At which airport did you arrive at the St. Pete/Clearwater area?  
Question: Which airline did you use?  
Base sizes: Visitors who arrived at the area by airplane (2215) | Visitors who arrived in the area by airplane at TPA/PIE (2124)

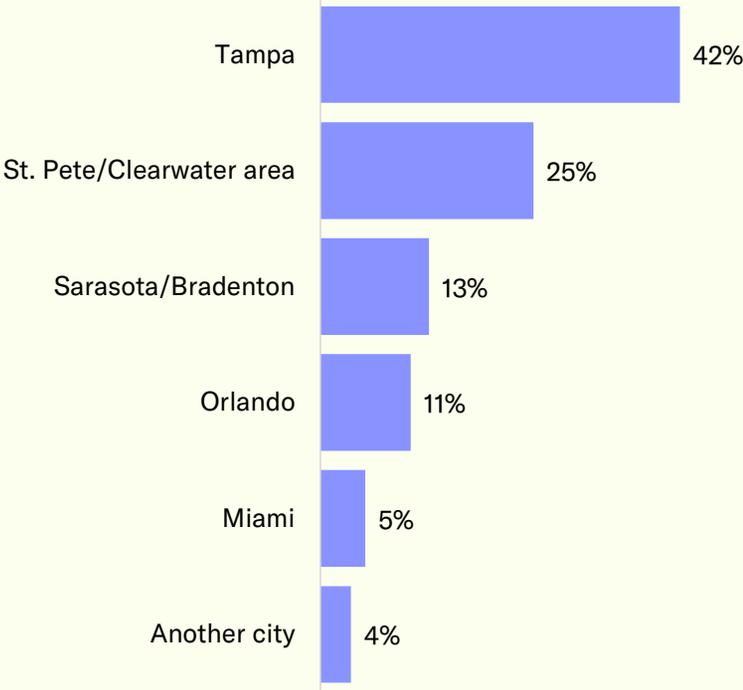
# Most visitors used their personal car/vehicle while in the area.

Among those who used a rental car in St. Pete-Clearwater, 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?

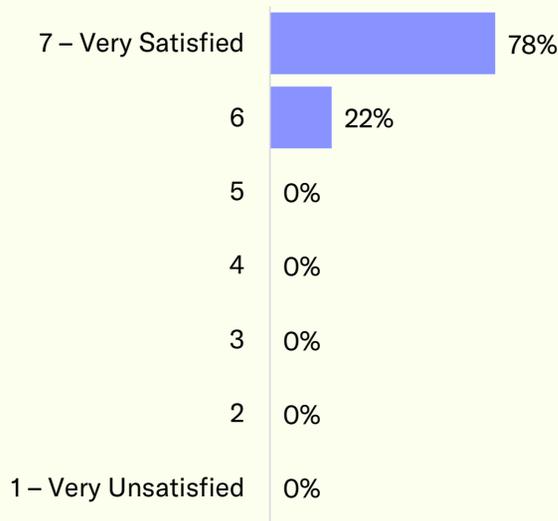
Question: In which city did you rent your rental vehicle?

Base sizes: Total visitors (4977) | Visitors who arrived in the area by rental car (1324)

# **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?

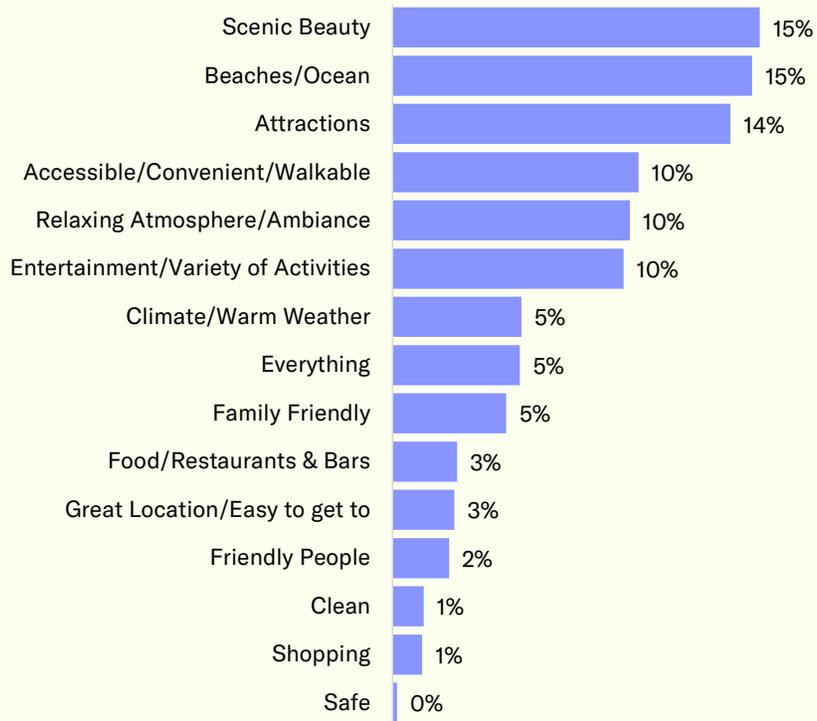
Question: How likely are you to recommend the St. Pete/Clearwater area as a place to visit to other travelers?

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

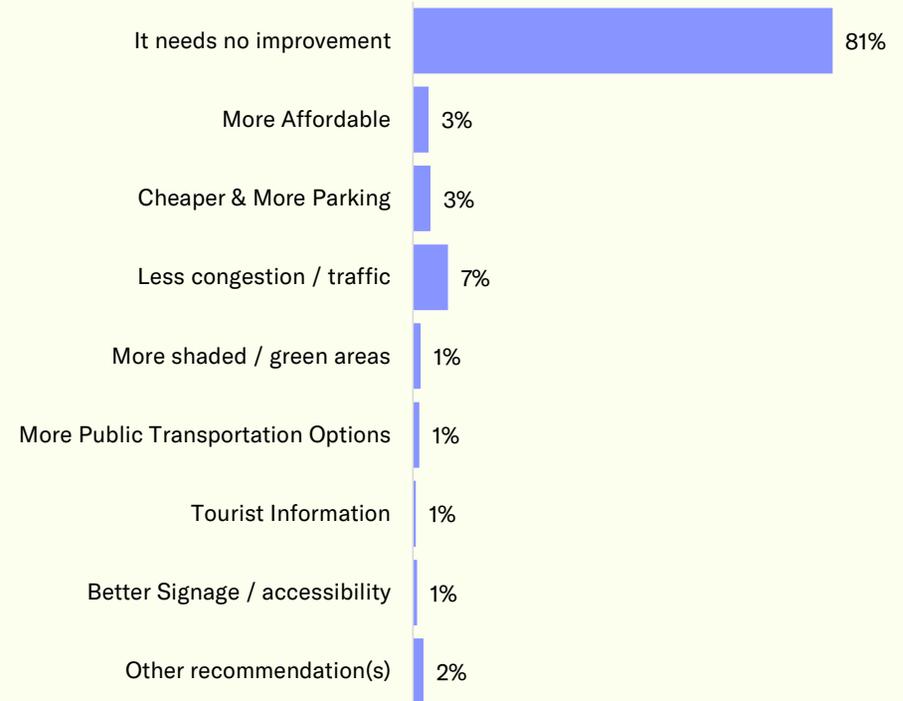
Base size: Total visitors (4977).

# The most liked aspects of St. Pete-Clearwater are the scenic beauty, beaches/ocean, and attractions.

Most Liked Aspects of St. Pete-Clearwater



Recommended Improvements: Attractions & Services



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

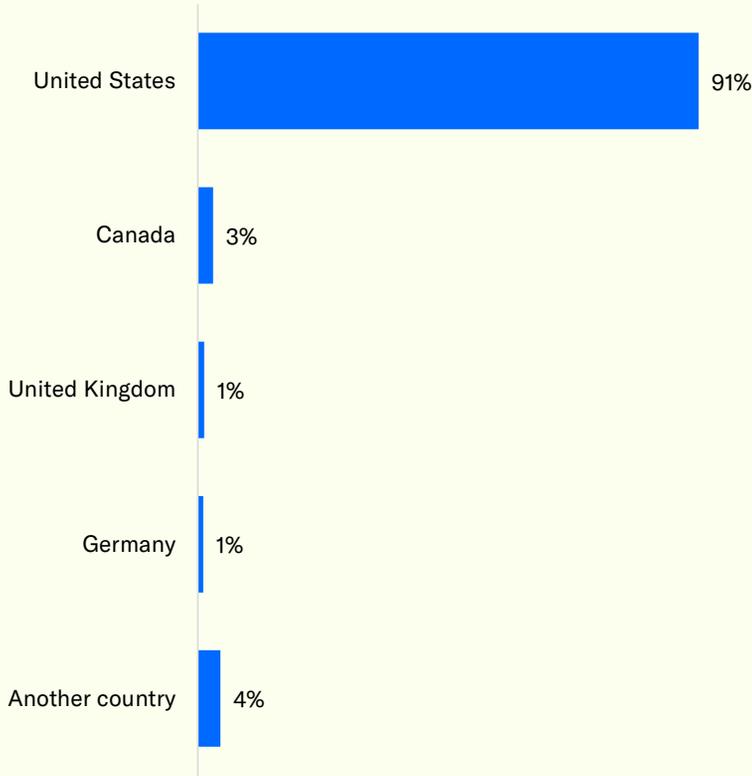
Question: In your opinion, what services or additional attractions would most enhance your experience in the St. Pete/Clearwater area? (Unaided)

Base sizes: Total visitors (4977)

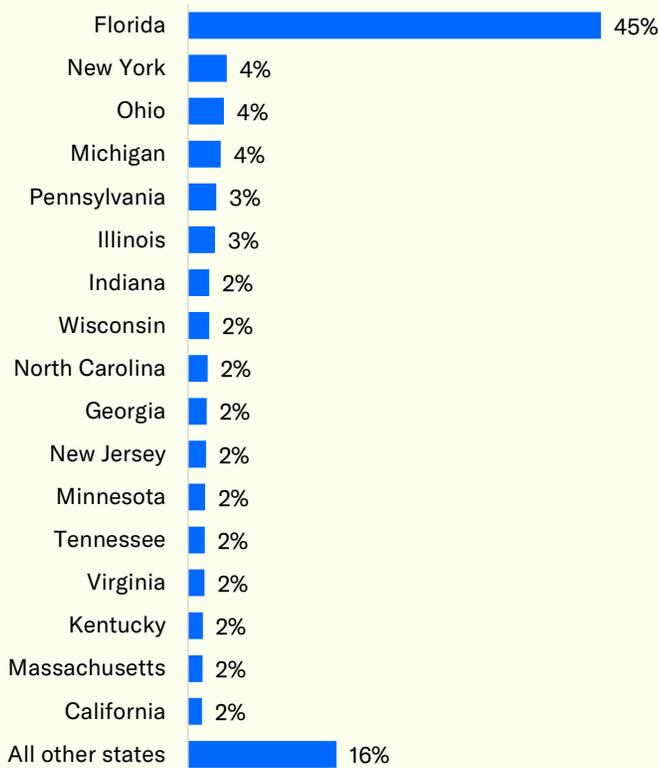
# Demographics

# Origin Market

Country of Origin

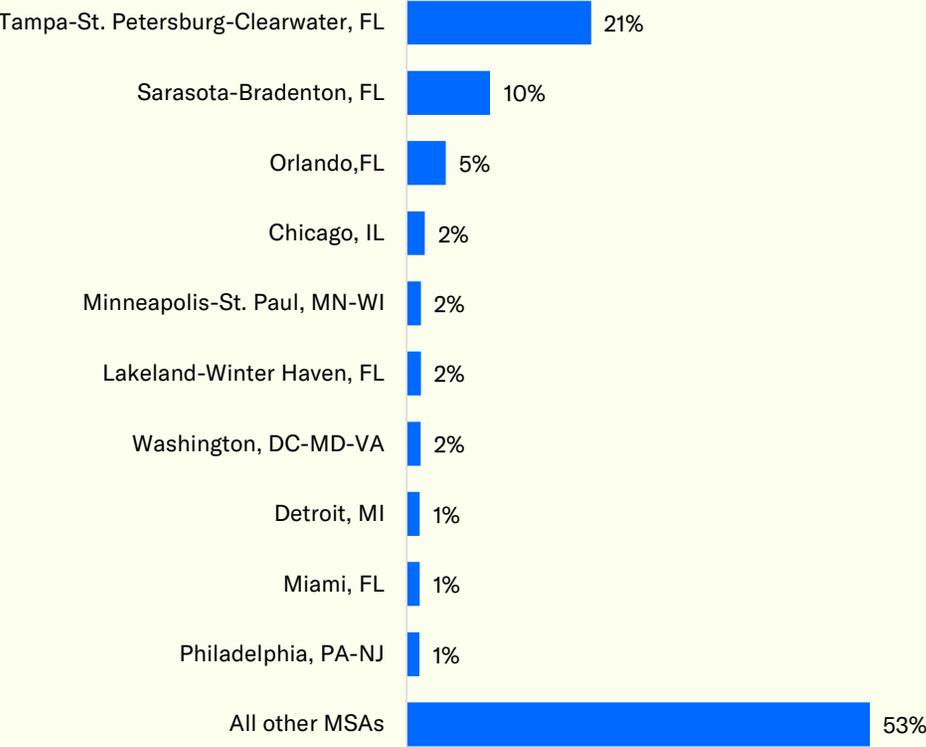


U.S. State of Origin



# Origin Market

## MSA of Origin



## Future Partners

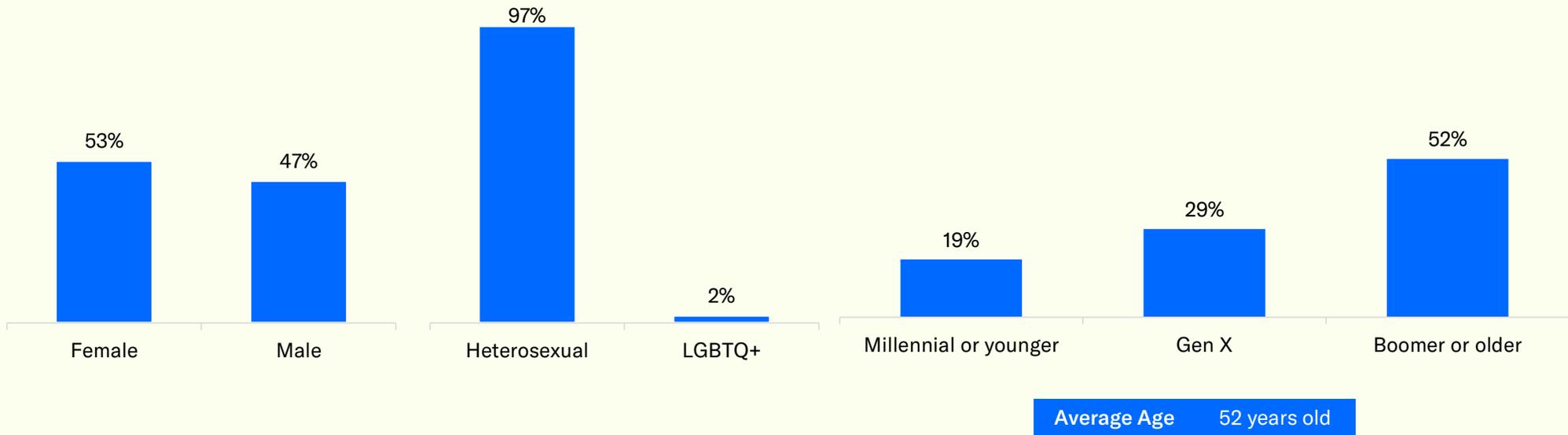


# Demographics

Gender

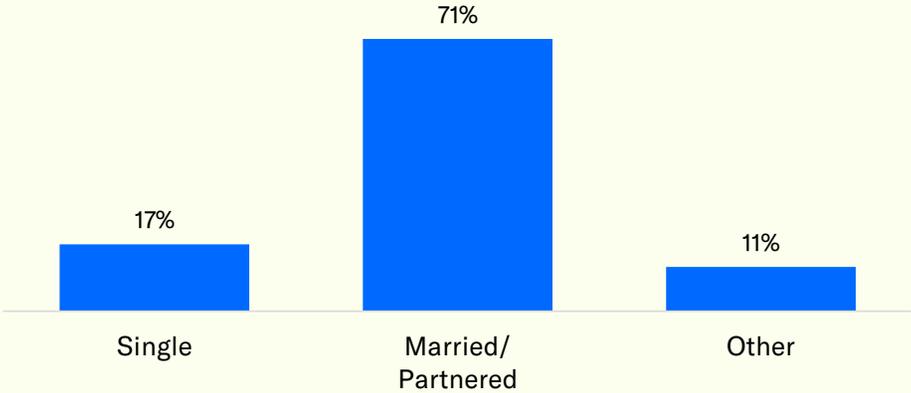
Orientation

Generation



# Demographics

Marital Status



Children in Household 16%

Household Income



Average HHI \$102,926

## Future Partners

# Demographics

Ethnicity/Racial Identity

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