

Future Partners



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

Table of Contents

Background & Overview	3
Methodology & Analysis	4
Economic Impact Analysis	5
Visitor Summary	
Quarterly (Year-over-Year)	10
Generations	12
Detailed Findings	
Trip Planning	16
Trip Details	19
Visitor Satisfaction	28
Demographics	31



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 FY2024 (July - September) findings for the visitor profile research.

Future Partners



Methodology & Analysis

In total, 1,343 completed surveys from Pinellas Co. visitors were collected from July 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
- Dunedin
- John's Pass Village & Boardwalk
- Pier 60
- Salvador Dali Museum
- St. Pete Pier
- St. Pete/Clearwater International Airport
- Sunken Gardens
- Tampa International Airport
- Tradewinds Island Grand

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 FY2024

Visitors to Pinellas Co. 
3.7 Million


Direct Visitor Spending 
\$1.56 Billion

Total Economic Impact 
\$2.64 Billion

Total Tax Revenues 
\$95.49 Million

 Hotel Room Nights
1.5 Million

 Tourism Industry Payroll
\$835 Million

 Jobs Supported
Over 25,000

Economic Impact Estimates

The visitor volume to St. Pete-Clearwater in Q4 FY2024 (July - September) is estimated to total 3,721,917. Additionally, it is estimated that visitors to the area during this timeframe generated over \$1.5 billion in direct spending and over \$95 million in total tax revenue for Pinellas Co.

	Q4 FY2023 (Jul – Sep)	Q1 FY2024 (Oct – Dec)	Q2 FY2024 (Jan – Mar)	Q3 FY2024 (Apr – Jun)	Q4 FY2024 (Jul – Sep)
Visitors to Pinellas Co.	3,751,685	3,387,120	4,109,415	4,186,292	3,721,917
Direct Visitor Spending in Pinellas Co.	\$1,425,037,162	\$1,466,267,870	\$1,978,345,214	\$1,790,441,335	\$1,558,292,259
Total Economic Impact of Tourism to Pinellas Co.	\$2,340,821,574	\$2,346,945,485	\$3,242,183,648	\$2,975,733,264	\$2,635,512,013
Total Tax Revenue Generated for Pinellas Co.	\$88,790,118	\$88,506,846	\$129,175,193	\$114,480,469	\$95,494,140
Hotel Room Nights	1,505,245	1,443,568	1,774,670	1,715,734	1,509,406
Tourism Industry Payroll	\$744,509,598	\$745,503,967	\$1,020,297,731	\$941,639,657	\$835,288,807

Economic Impact Estimates - by Visitor Type & Category

Q4 FY2024 July - August 2024		
	Visitors	Direct Spend
Hotel/ Motel/ B&B	888,196,798	\$771,757,105
Friends/ Relatives (VFR)	151,542,576	\$74,169,468
Vacation Rental/Home Share	460,240,146	\$465,414,901
Day Trip (Regional)	1,373,101,455	\$136,719,256
Day Trip (Traveler)	813,623,844	\$99,462,015
Other	35,211,878	\$10,769,515
Total Visitors	3,721,916,699	\$1,558,292,259

Q4 FY2024 July - August 2024	
	Category Spend
Lodging/ Accommodations	\$555,582,175
Restaurants/ Dining	\$481,731,265
Retail/ Shopping	\$210,506,521
Entertainment/ Sightseeing	\$222,133,442
Local Transportation	\$43,679,986
Car Rental	\$44,193,364
Other	\$465,506
Total Direct Spending	\$1,558,292,259

Economic Impact: Definitions

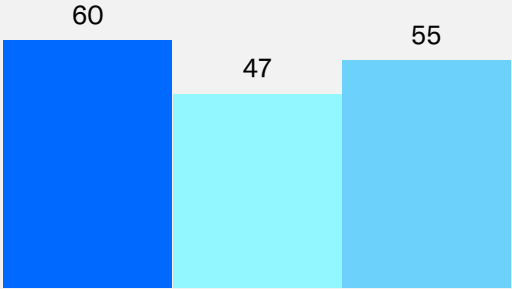
The following definitions, as they relate to economic impact, are used throughout this report:

- **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/Home Share Guests:** Visitors who stayed overnight in a condo, vacation home, or home share rental (i.e., AirBnB, VRBO, etc.) 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.
- **Other Guests:** Pinellas Co. visitors who stayed overnight in other types of lodging.

Visitor Summary: Year-over-Year

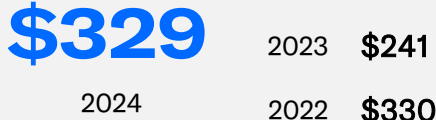
Year-over-Year Comparisons for Fiscal Year Q4

Average Days Between Decision to Visit & Arrival

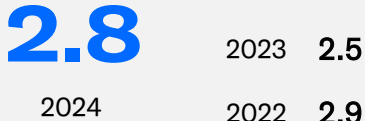


■ 2024 ■ 2023 ■ 2022

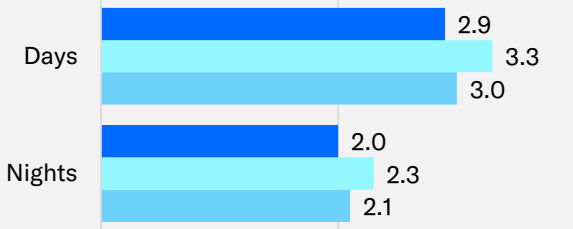
Average Daily Spending Per Travel Party



Travel Party Size

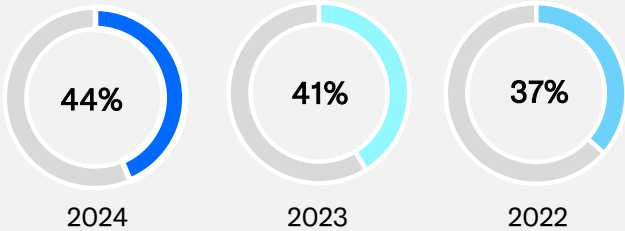


Average Days & Nights

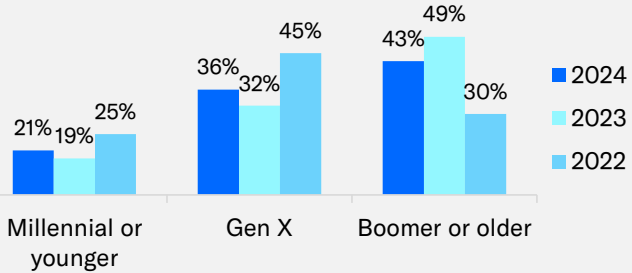


■ 2024 ■ 2023 ■ 2022

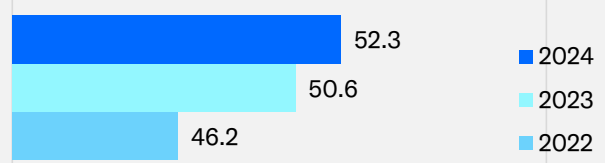
Overnight in Pinellas Co.



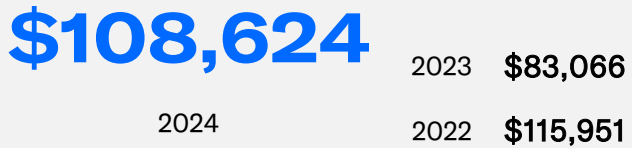
Generation



Average Age



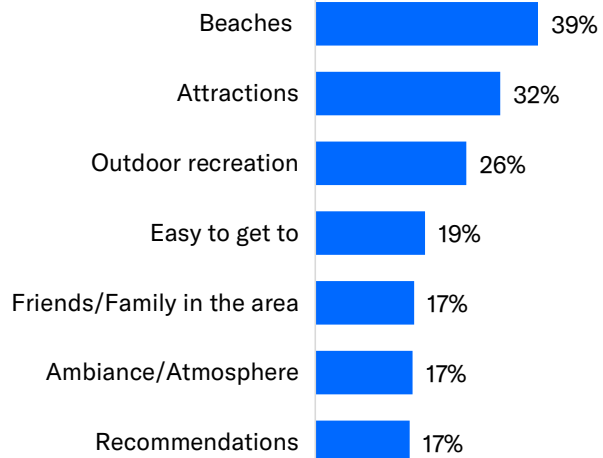
Average Household Income



Visitor Summary: Generations

Millennial Travelers

Important Factors for Destination Selection



Average Daily Spending Per Travel Party



\$288

Travel Party Size



3.0

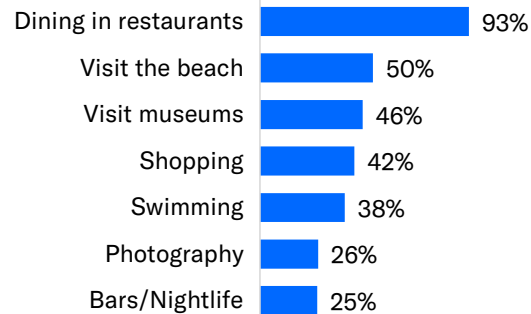
20% traveled with children

Average Length of Stay

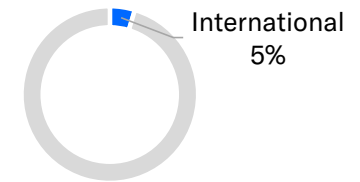


2.1 days

Top Activities



International Visitation



Origin States



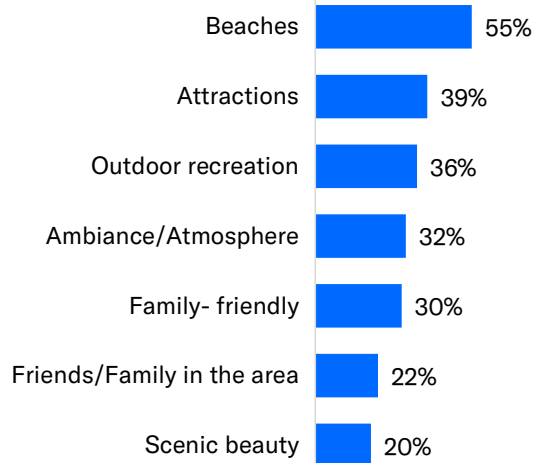
Communities Visited



St. Petersburg - 68%
Clearwater Beach - 23%
Madeira Beach - 18%
St. Pete Beach - 11%
Dunedin - 8%

Gen X Travelers

Important Factors for Destination Selection



Average Daily Spending Per Travel Party



\$369

Travel Party Size



3.1

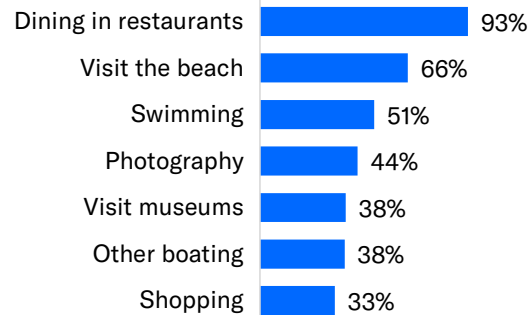
29% traveled with children

Average Length of Stay

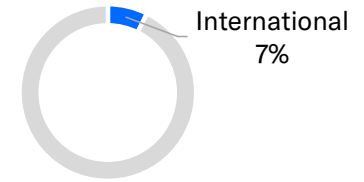


3.2 days

Top Activities



International Visitation



Origin States



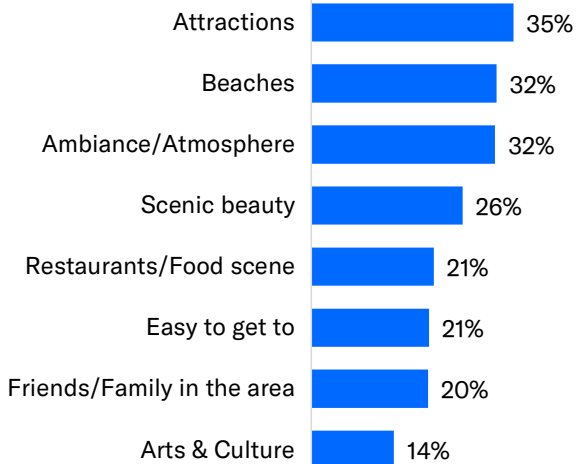
Communities Visited



St. Petersburg - 59%
Clearwater Beach - 43%
Madeira Beach - 32%
St. Pete Beach - 19%
Dunedin - 17%

Boomer Travelers

Important Factors for Destination Selection



Average Daily Spending Per Travel Party



\$319

Travel Party Size



2.5

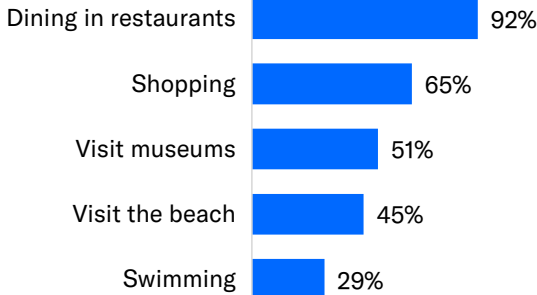
4% traveled with children

Average Length of Stay

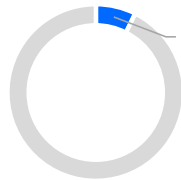


3.0 days

Top Activities



International Visitation



International
7%

Origin States



Communities Visited



St. Petersburg - 62%
Clearwater Beach - 28%
Madeira Beach - 25%
Dunedin - 16%
Tarpon Springs - 15%

Detailed Findings: Trip Planning

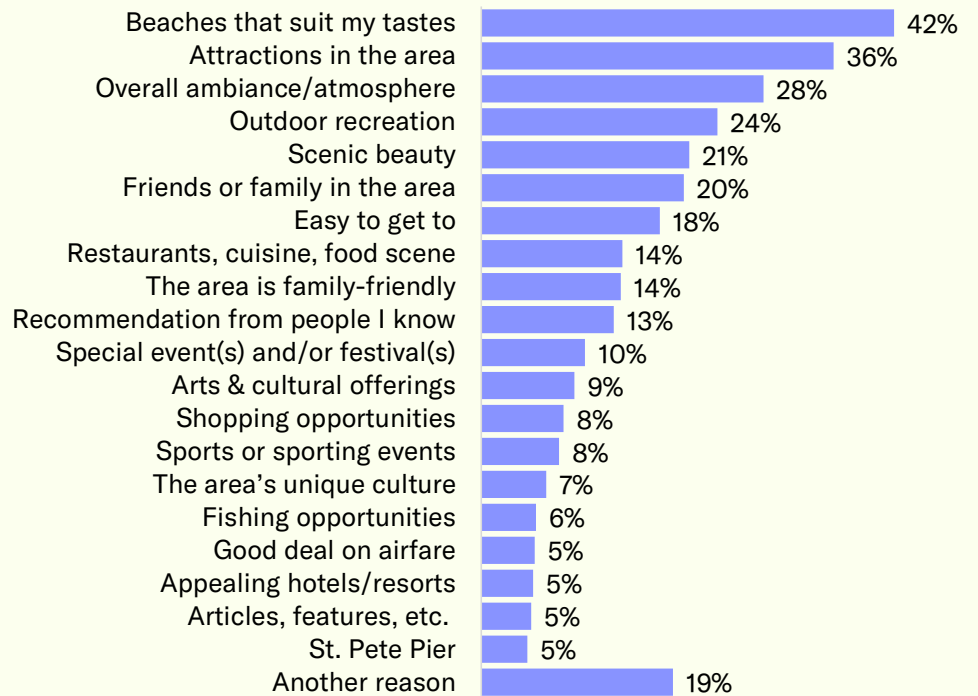
Visitors made the decision to visit St. Pete-Clearwater around two months prior to arrival.

Beaches, attractions, beaches, ambiance/atmosphere, and outdoor recreation 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?

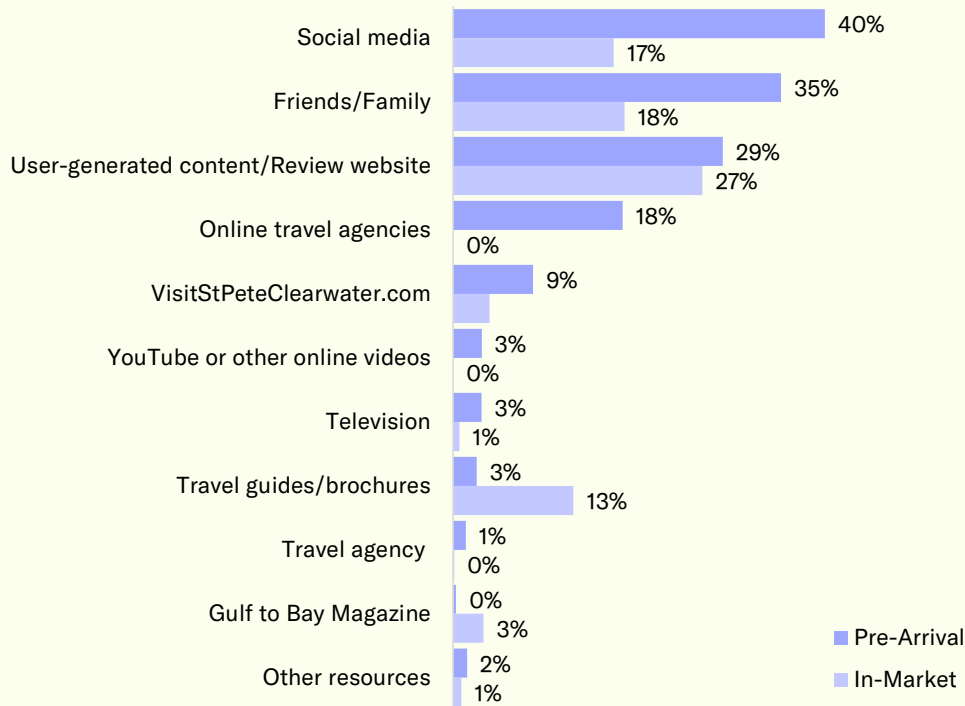
Question: Which of the following were IMPORTANT to your decision to take this trip to the St. Pete-Clearwater area? (Select all that apply)

Base sizes: Total visitors (1343)

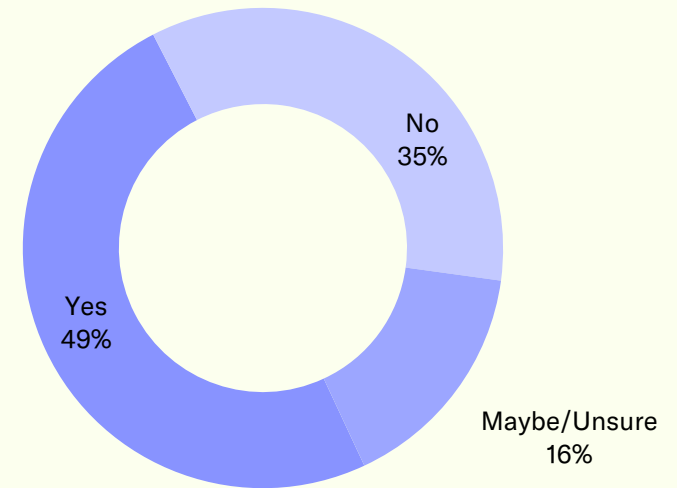
Social media was the most used resource before arriving in St. Pete-Clearwater, while review websites were used most in market.

Almost half of all visitors to St. Pete-Clearwater had 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.)

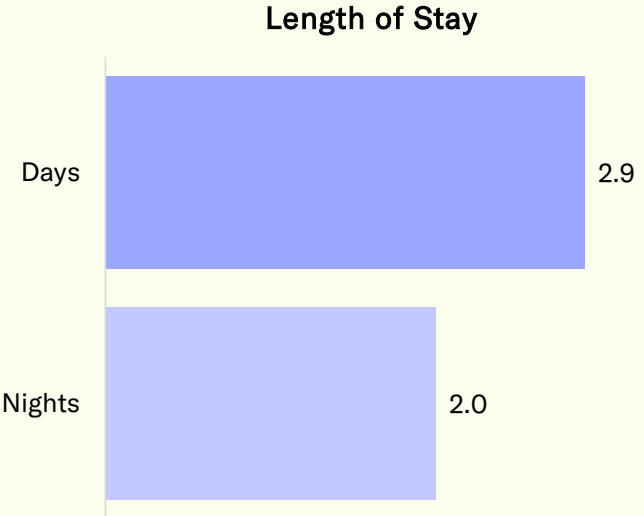
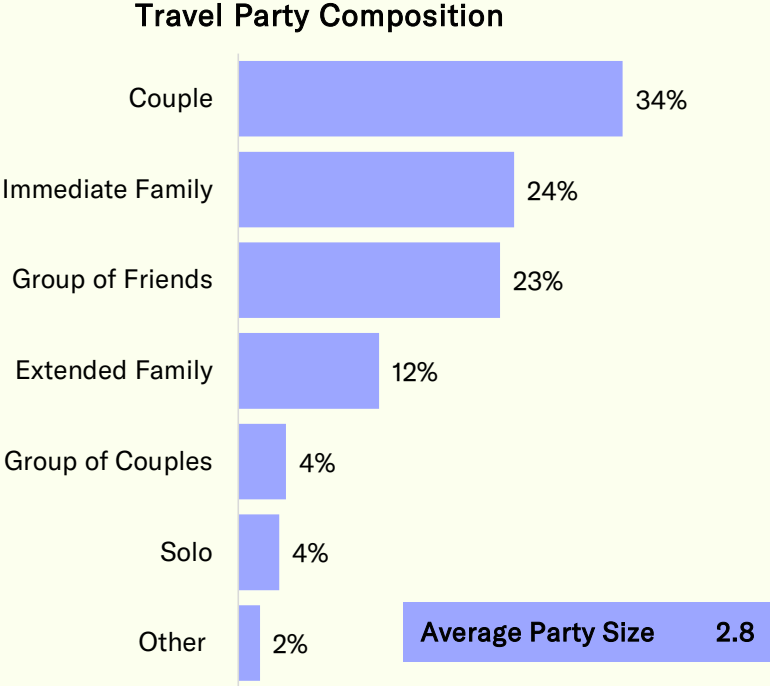
Question: In the last six months, have you seen, read, or heard any travel stories, advertising, or promotions for the St. Pete-Clearwater area?

Base sizes: Total visitors (1343)

Detailed Findings: Trip Details

Most visitors to St. Pete-Clearwater as a couple, with an average party size around three (3) people.

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

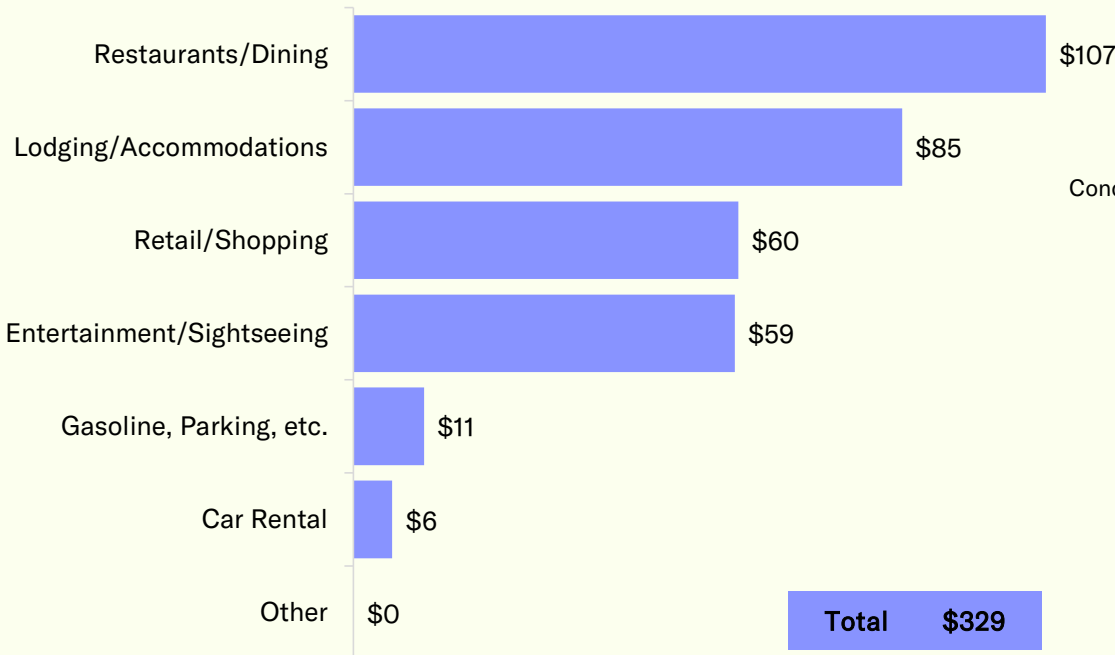


Question: Which best describes your travel group on this trip? Are you...?
Question: How many people of each type are in your immediate travel party, including yourself?
Question: How many total days and nights did you, or will you, stay in the St. Pete-Clearwater area on this trip?
Base sizes: Total visitors (1335-1343)

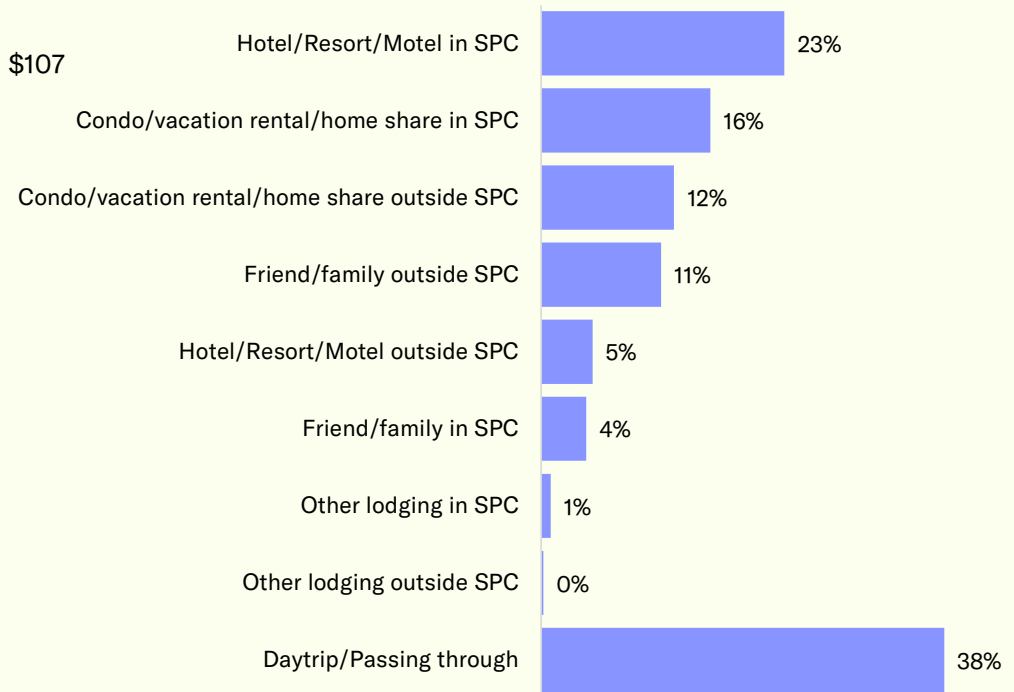
Visitors spent an average of \$329 per day, with restaurants/dining and lodging/accommodations being the largest expenses.

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

Average Daily Spend per Party



Lodging/Accommodations



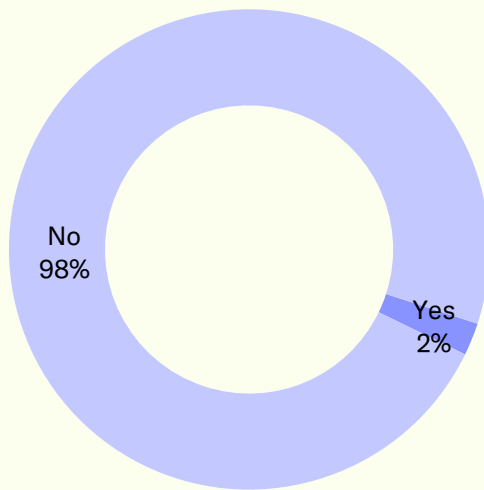
Question: PER DAY, approximately how much will you spend on each of the following while in the St. Pete-Clearwater area?

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

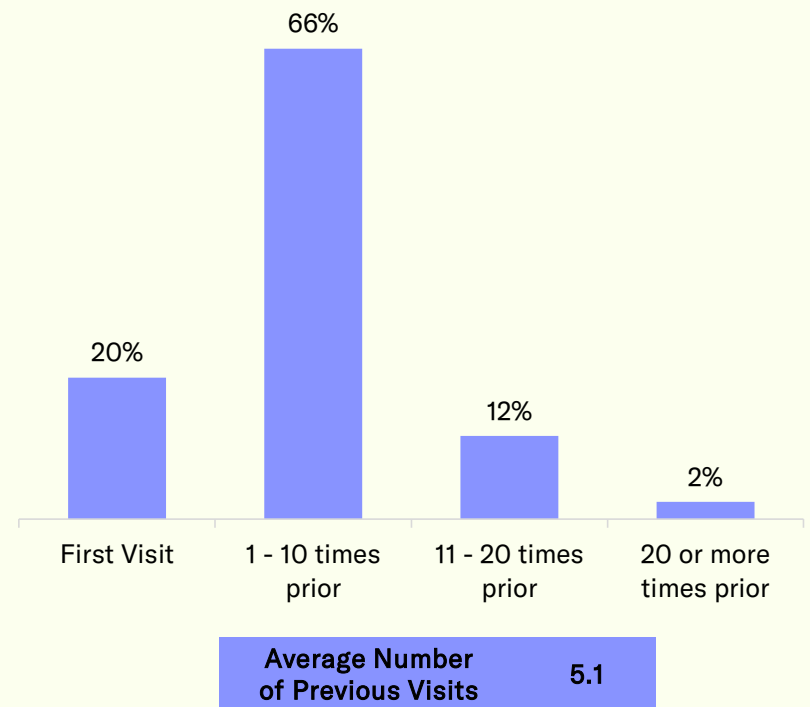
Base sizes: Total visitors (1328-1343)

Most visitors had been to Florida previously, and among those over 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

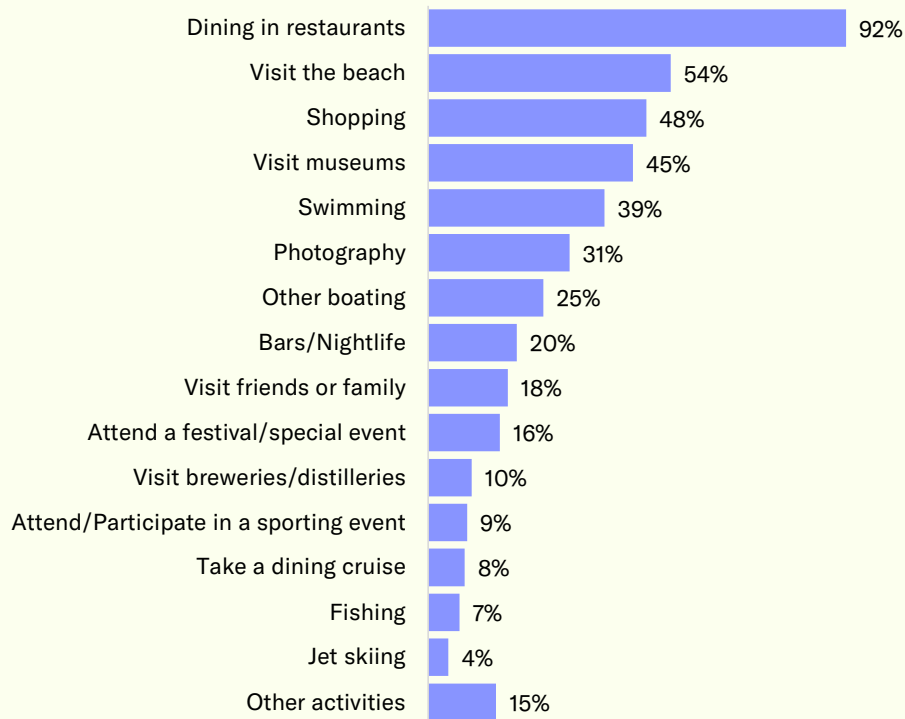
Question: How did you arrive to the St. Pete-Clearwater area and how will you leave? (Select all that apply)

Base sizes: Total visitors (1343) | Previously visited Florida (1319)

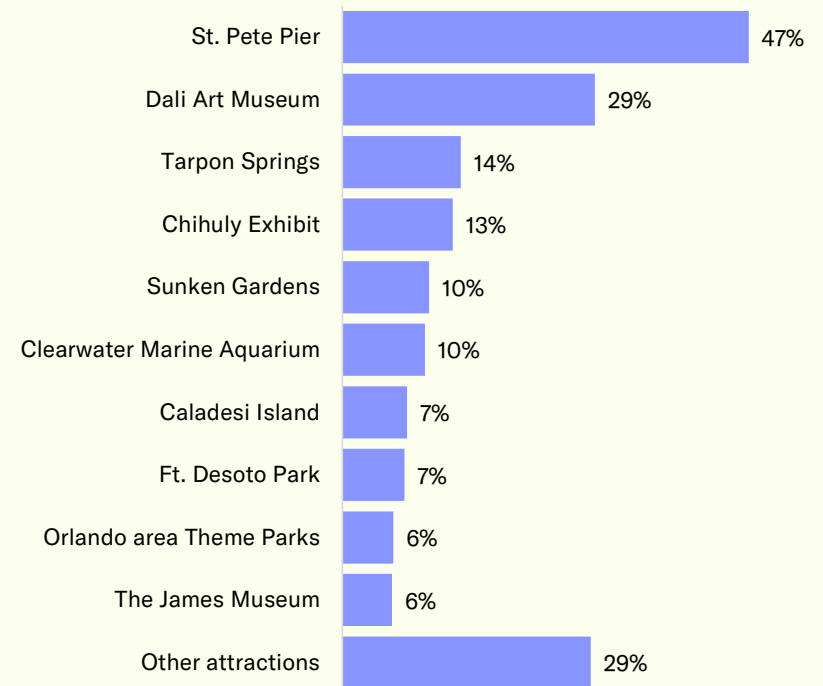
Most visitors dined in restaurants, while visiting the beach, shopping, and visiting museums were also popular activities.

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

Trip Activities



Attractions Visited

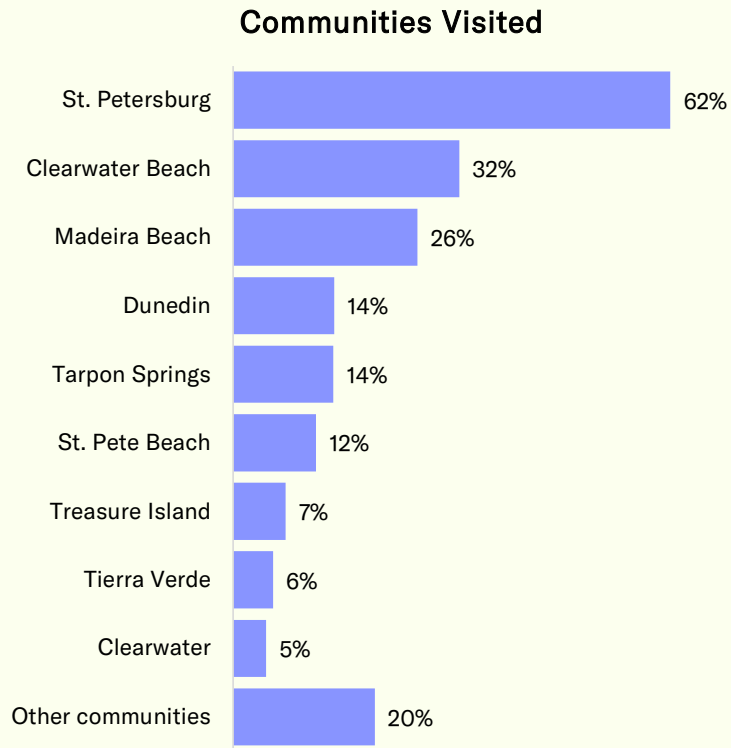


Question: Which of these activities did you, or will you, participate in while in the St. Pete-Clearwater area? (Select all that apply)

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

Base sizes: Total visitors (1343)

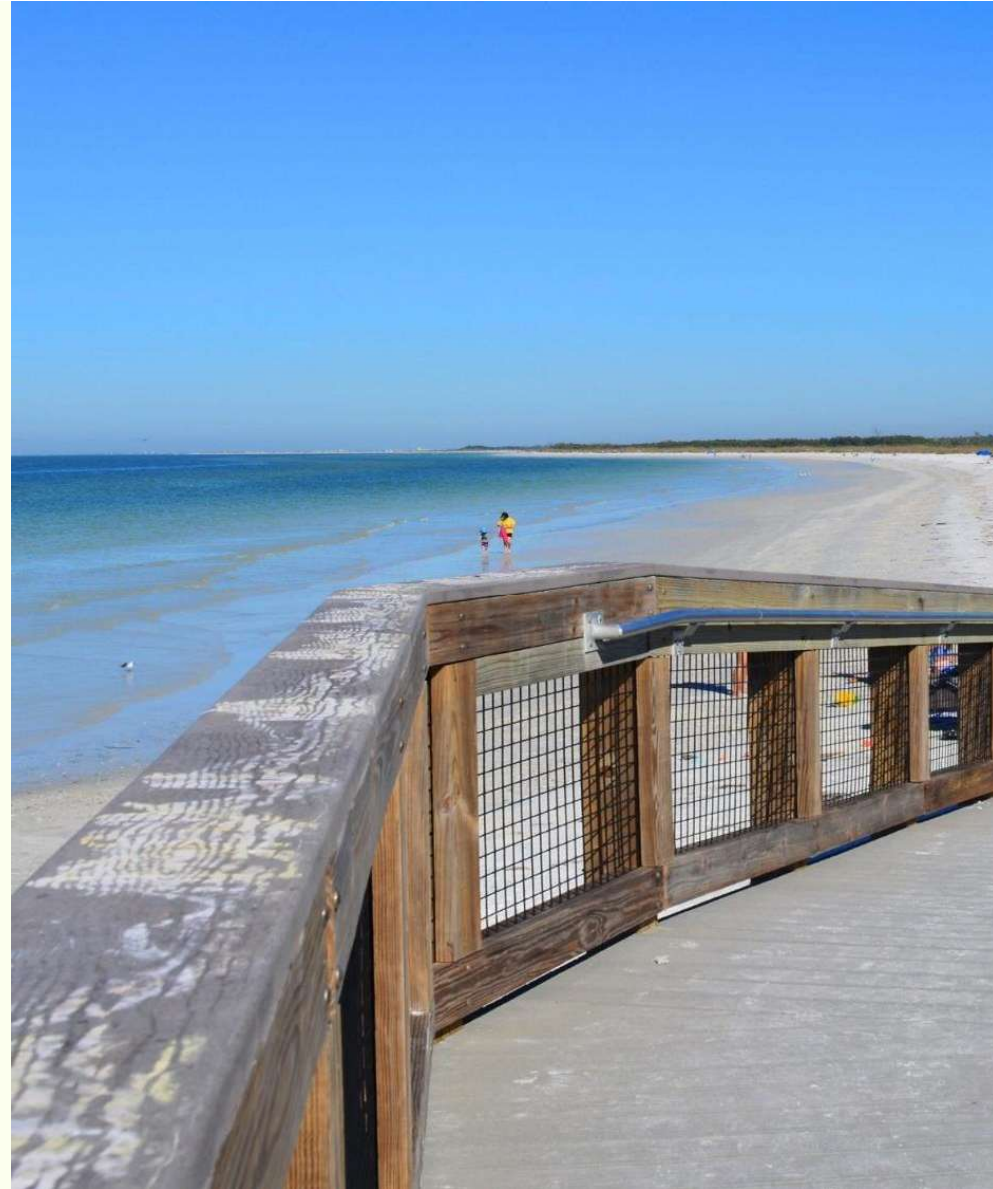
St. Petersburg was the most visited area, followed by Clearwater Beach and Madeira Beach.



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

Base size: Total visitors (1343)

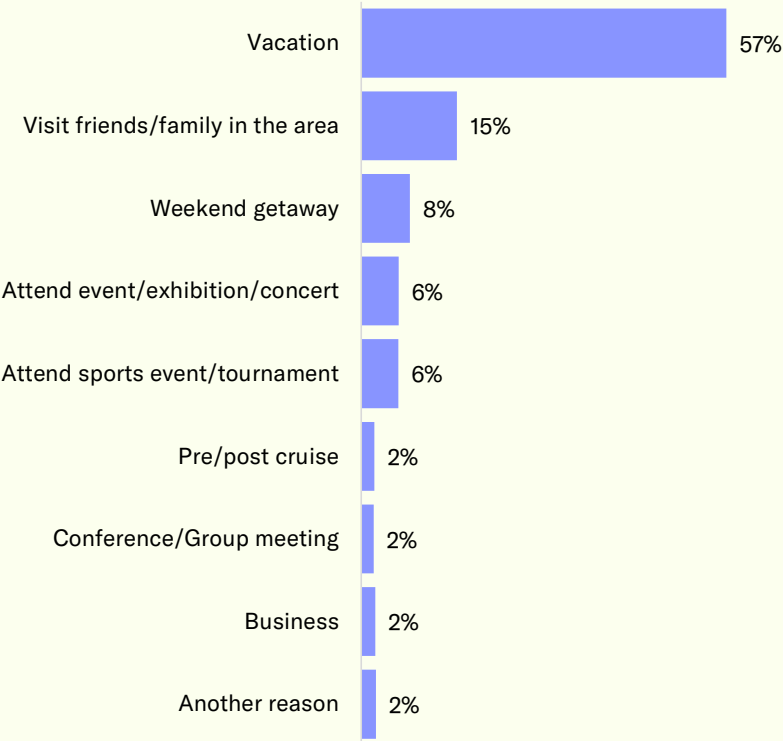
Future Partners



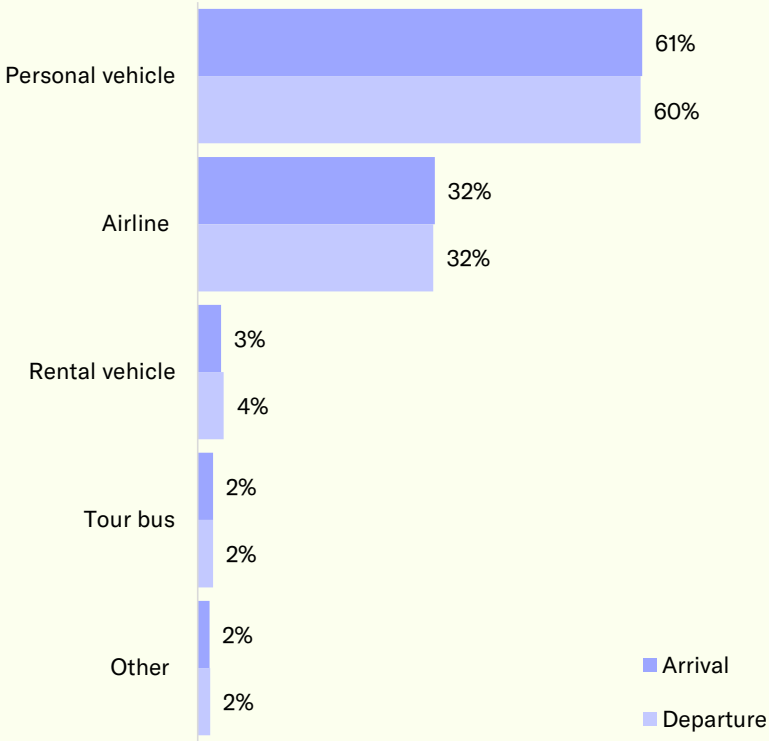
Most visitors came to St. Pete-Clearwater for vacation.

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

Primary Reason for Visit



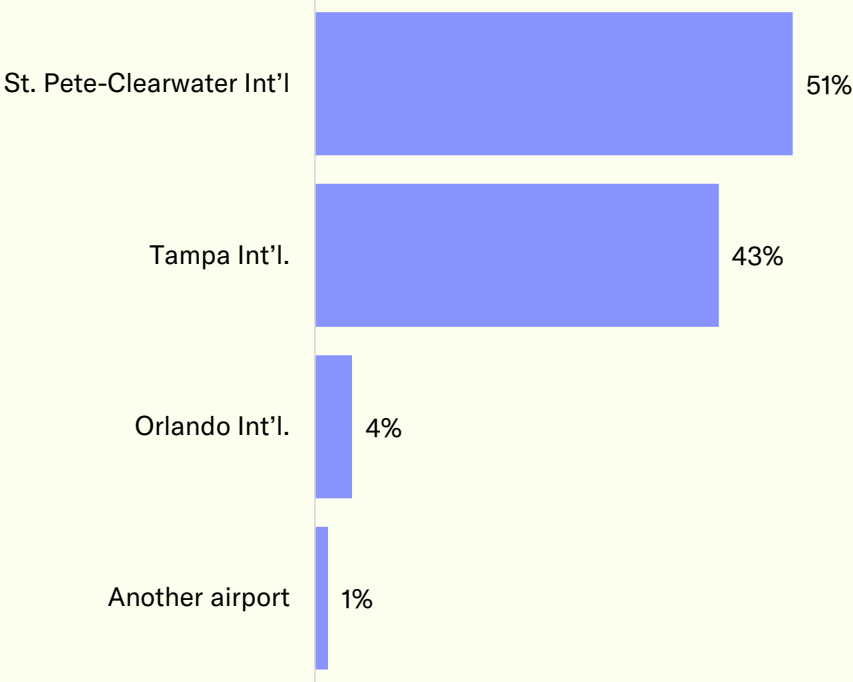
Method of Arrival & Departure



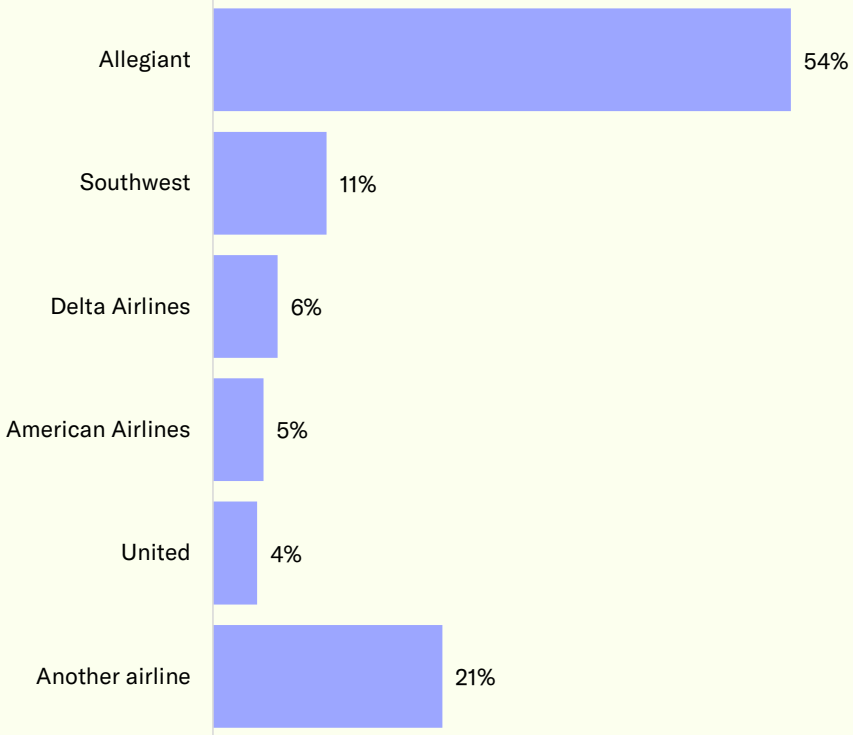
Question: What is your primary reason for visiting the St. Pete-Clearwater Area?
 Question: How did you arrive to the St. Pete-Clearwater area and how will you leave? (Select all that apply)
 Base sizes: Total visitors (1343)

Over half of the visitors who flew into the area used St. Pete-Clearwater International airport.

Arrival Airport



Airline Used



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

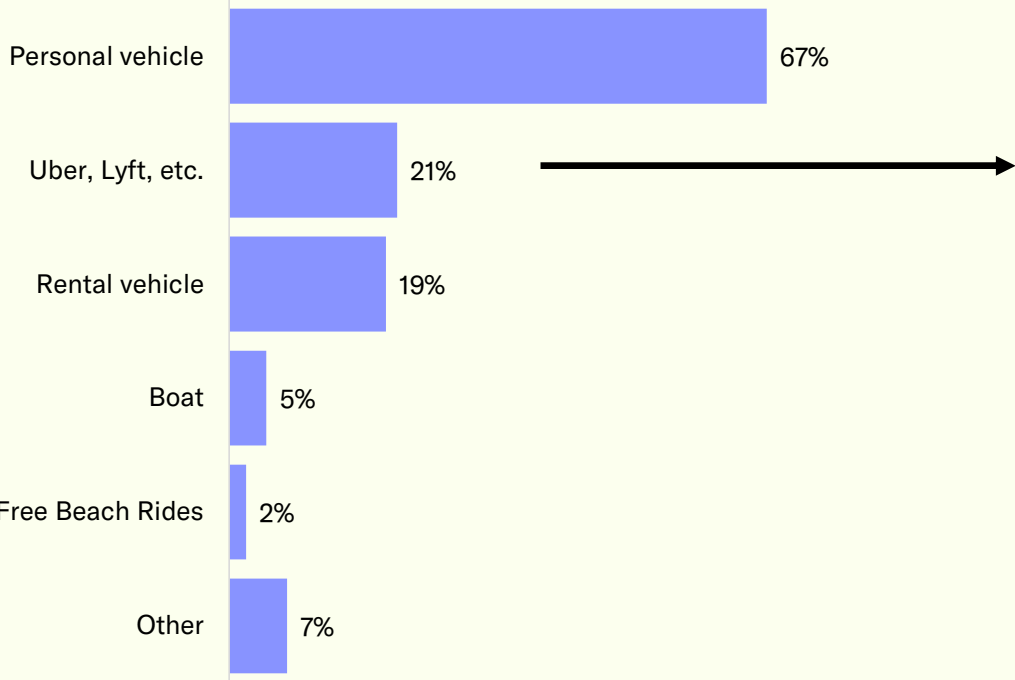
Question: Which airline did you use?

Base sizes: Visitors who arrived at the area by airplane (637) | Visitors who arrived in the area by airplane at TPA/PIE (607)

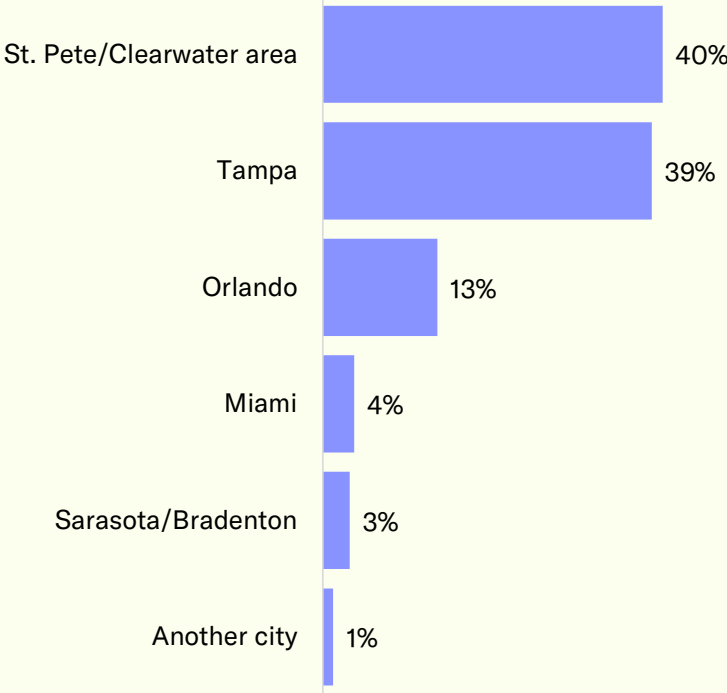
Most visitors used their personal car/vehicle while in the area.

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

In-Market Transportation Used



Rental Car Pickup Location

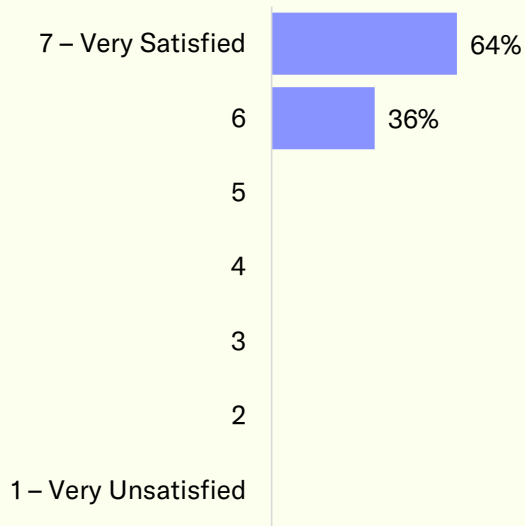


Question: Which modes of transportation did you, or will you, use while in the St. Pete-Clearwater area?
Question: Which airline did you use?
Base sizes: All visitors (1343) | Visitors who arrived in the area by rental car (322)

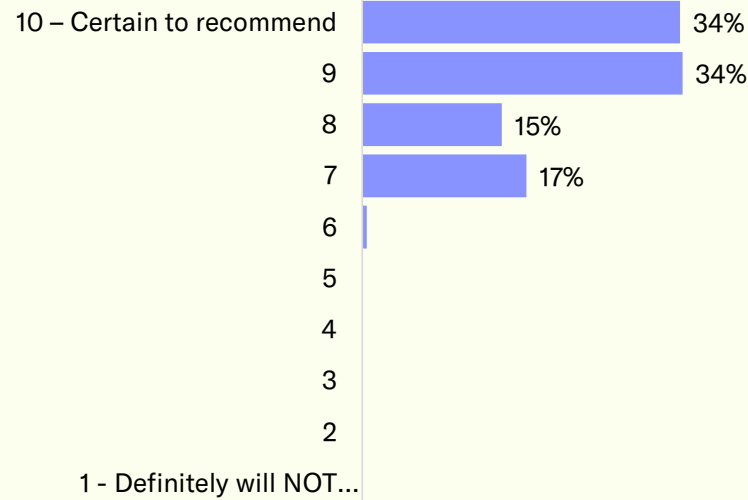
Detailed Findings: Visitor Satisfaction

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.

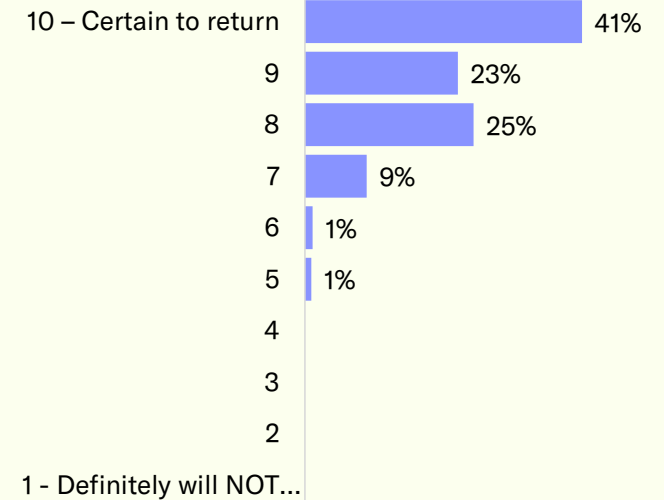
Satisfaction



Likelihood to Recommend



Likelihood to Return



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

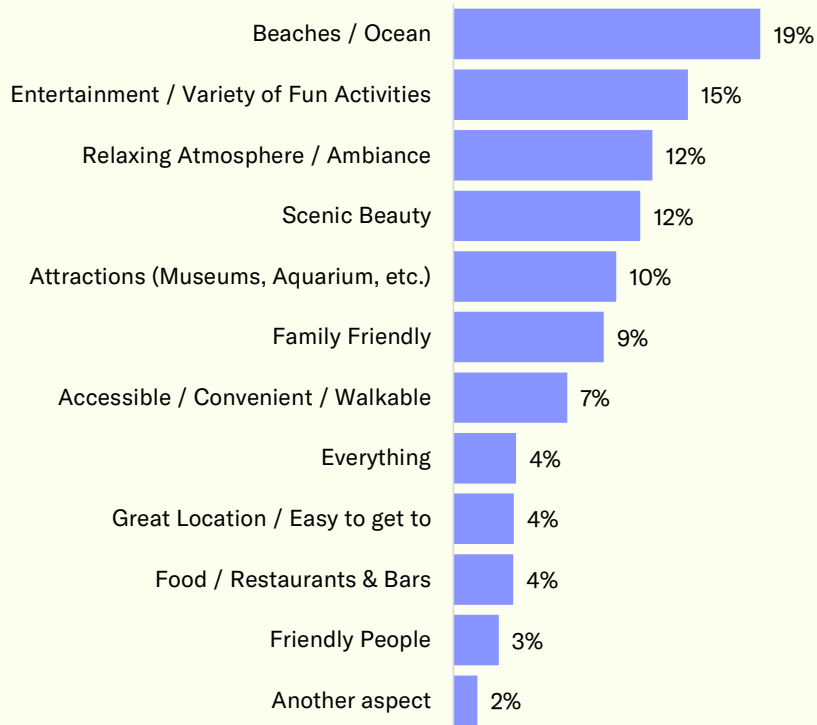
Question: How likely are you to recommend the St. Pete-Clearwater area as a place to visit to other travelers?

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

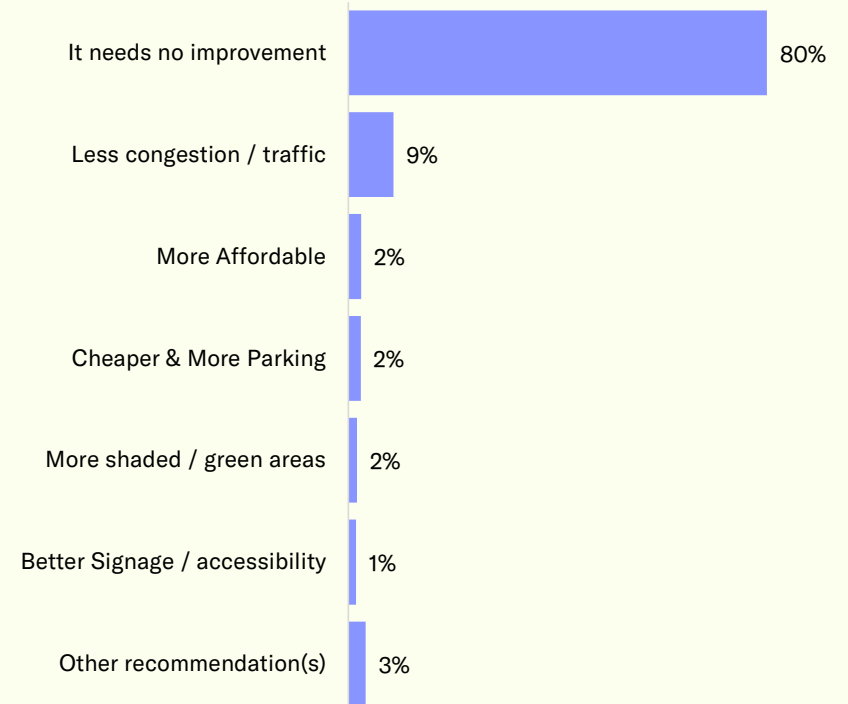
Base size: Total visitors (1343).

The most liked aspects of St. Pete-Clearwater are the beaches/ocean, entertainment/activities, and atmosphere.

Most Liked Aspects of St. Pete-Clearwater



Recommended Improvements: Attractions & Services



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

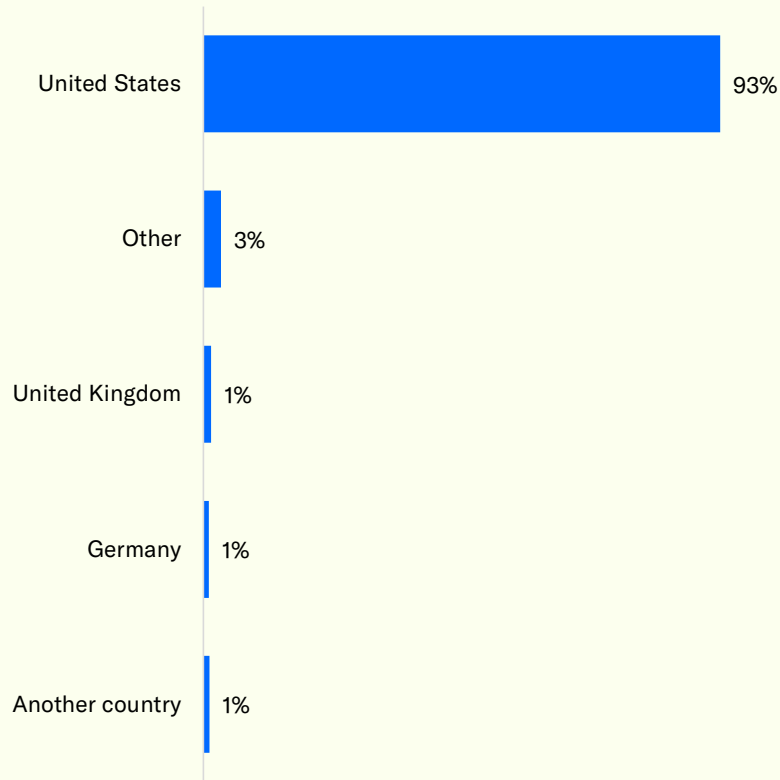
Question: In your opinion, what services or additional attractions would most enhance your experience in the St. Pete-Clearwater area? (Unaided)

Base sizes: Total visitors (1343)

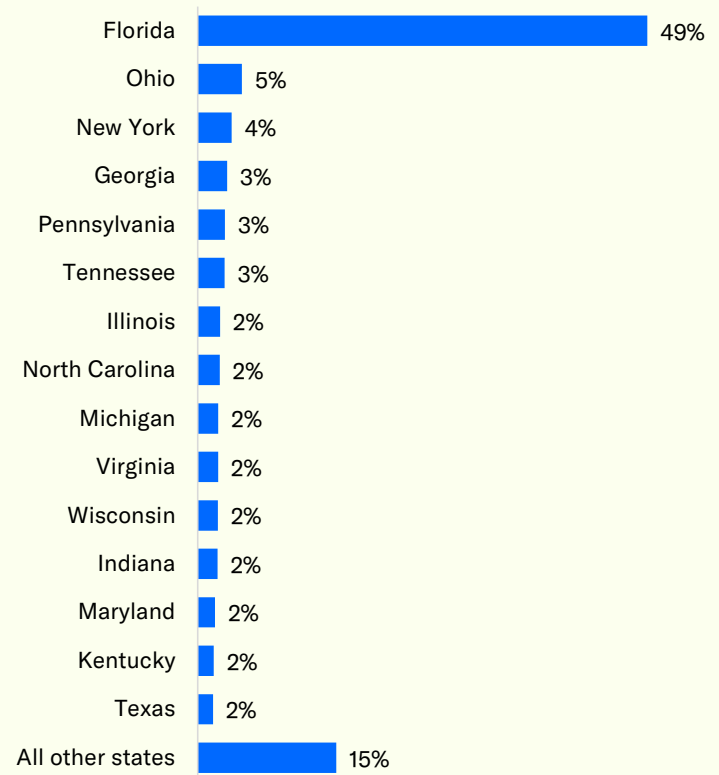
Demographics

Origin Market

Country of Origin

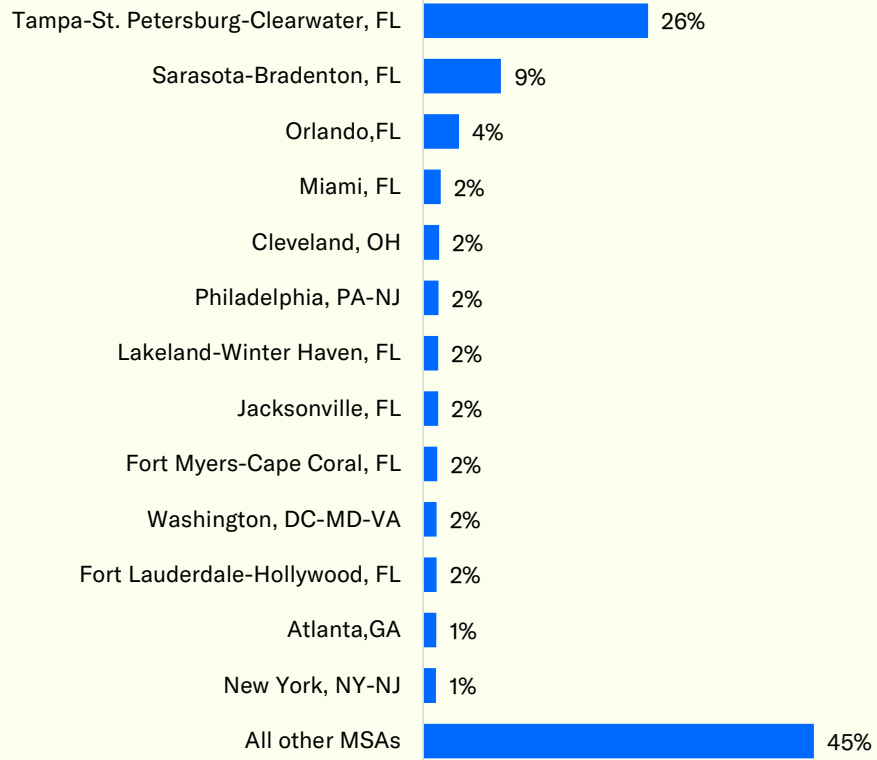


U.S. State of Origin

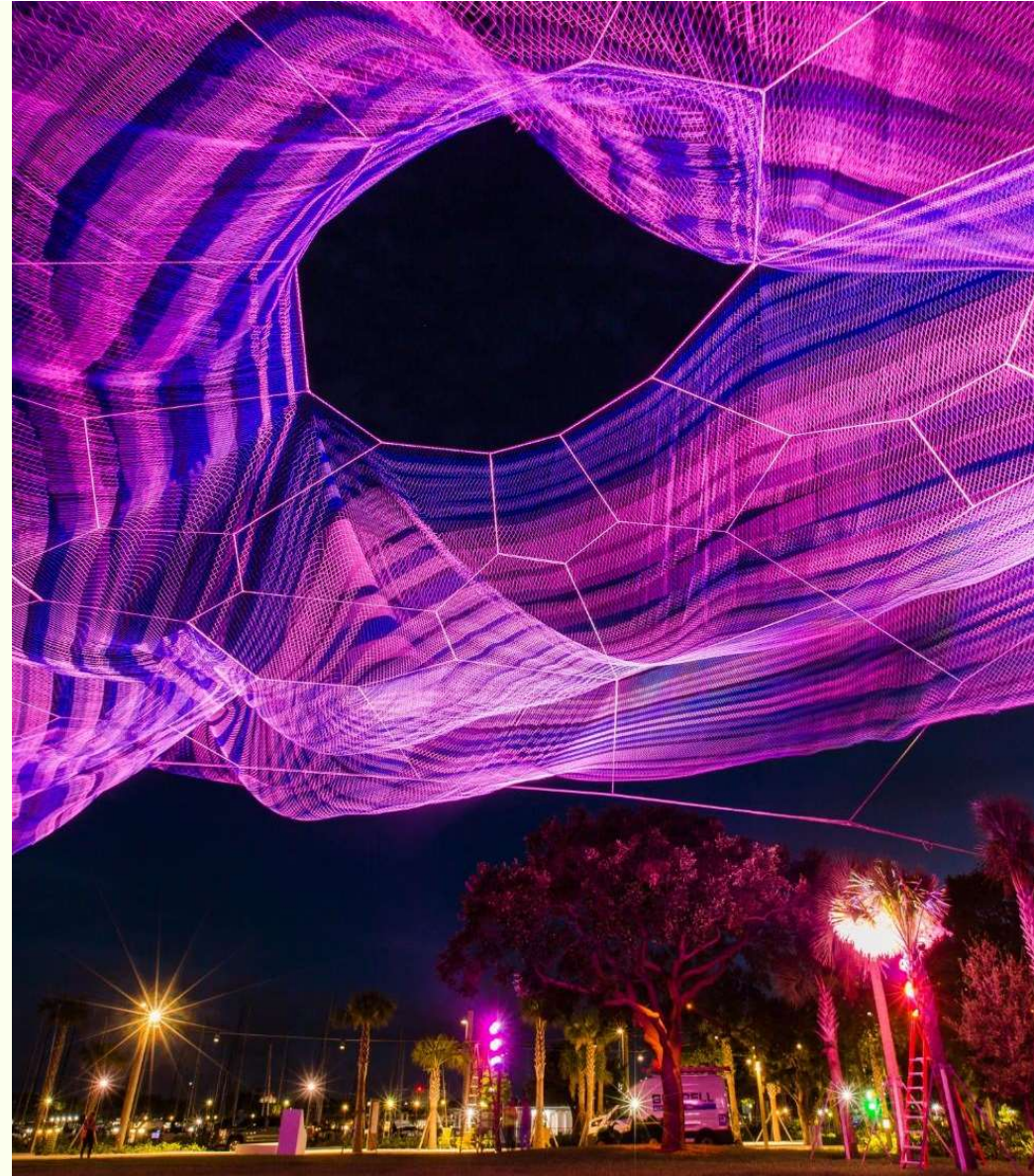


Origin Market

MSA of Origin

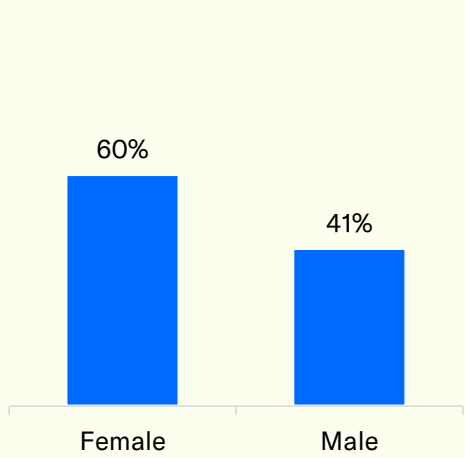


Future Partners

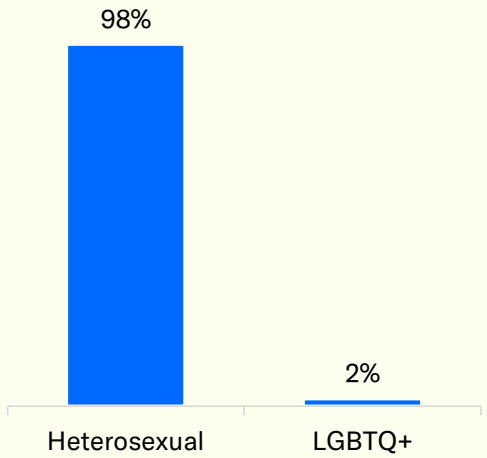


Demographics

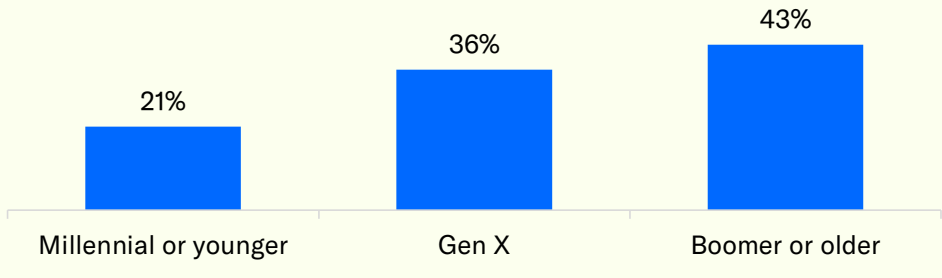
Gender



Orientation



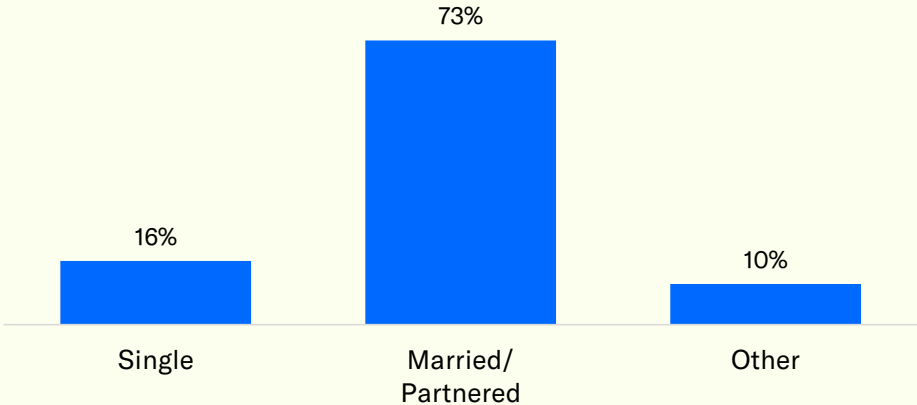
Generation



Average Age 49.5 years old

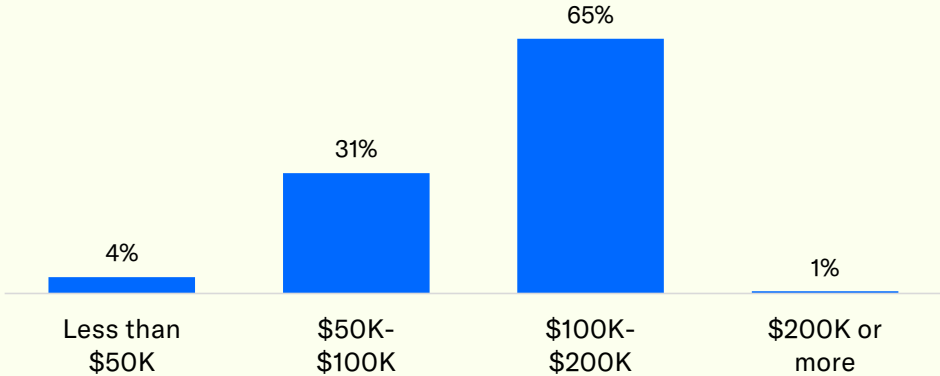
Demographics

Marital Status



Children in Household 26%

Household Income



Average HHI \$109,324

Future Partners

Demographics

Ethnicity/Racial Identity

