Future Partners

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

# Table of Contents


| | |
|---|---|
| Background & Overview | 3 |
| Methodology & Analysis | 4 |
| Economic Impact Analysis | 5 |
| Quarterly Visitor Summary (Year-over-Year) | 10 |
| Infographic Summary | |
| Traveler Segments | 12 |
| Generations | 17 |
| Detailed Findings | |
| Trip Planning | 21 |
| Trip Details | 24 |
| Visitor Satisfaction | 32 |
| Demographics | 35 |

# 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 2025 (January - March) findings for the visitor profile research.

# Methodology & Analysis

In total, 1,424 completed surveys from Pinellas Co. visitors were collected from January through March 2025. 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
- Gulfport
- John’s Pass Village & Boardwalk
- Museum of Fine Arts
- Pier 60
- Salvador Dali Museum
- St. Pete-Clearwater International Airport
- St. Pete Pier
- Sunken Gardens
- Tampa International Airport
- Tarpon Springs
- Tradewinds Island Grand
- Wyndham Grand Clearwater Beach

The data presented is 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 & 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.

# St. Pete/Clearwater Economic Impact Estimates Q1 2025

Key metrics showing the performance of the Pinellas County visitor industry are below:

**Visitors to Pinellas Co.**

4.2 Million

**Direct Visitor Spending**

$1.8 Billion

**Total Economic Impact**

$3.0 Billion

**Taxes Revenues**

$117.2 Million

**Hotel Room Nights**

1.8 Million

**Jobs Supported by Visitor Industry***

28,000+

**Note not all jobs supported by the visitor industry are located within Pinellas County.*

**Tourism Industry Payroll**

$948.9 Million

# Economic Impact Estimates

The visitor volume to St. Pete/Clearwater in Q1 2025 (January - March) is estimated to have totaled 4,182,333. Additionally, it is estimated that visitors to the area during this timeframe generated almost $1.8 billion in direct spending and over $117 million in tax revenue for Pinellas Co.

| | Q1 2024 (Jan – Mar) | Q2 2024 (Apr – Jun) | Q3 2024 (Jul – Sep) | Q4 2024 (Oct – Dec) | Q1 2025 (Jan – Mar) |
|---|---|---|---|---|---|
| Visitors to Pinellas Co. | 4,109,414 | 4,186,292 | 3,660,466 | 3,193,620 | 4,182,333 |
| Direct Visitor Spending in Pinellas Co. | $1,978,345,214 | $1,790,441,335 | $1,522,209,001 | $1,312,115,741 | $1,781,389,264 |
| Total Economic Impact of Tourism to Pinellas Co. | $3,242,183,648 | $2,975,733,264 | $2,577,143,158 | $2,223,072,082 | $2,964,647,727 |
| Tax Revenue Generated for Pinellas Co. | $130,306,812 | $114,480,469 | $93,746,297 | $81,815,396 | $117,160,325 |
| Hotel Room Nights | 1,774,671 | 1,715,734 | 1,455,054 | 1,474,800 | 1,781,033 |
| Tourism Industry Payroll | $1,020,297,731 | $941,639,657 | $817,120,094 | $708,732,181 | $948,872,394 |
| Jobs Supported | 31,280 | 29,019 | 24,944 | 21,449 | 28,628 |

# Economic Impact Estimates - by Visitor Type & Category

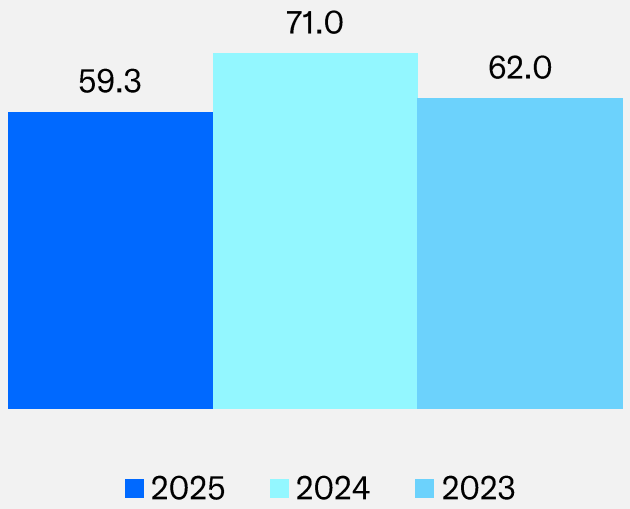
| | January - March 2025 | |
|---|---|---|
| | **Visitors** | **Direct Spend** |
| Hotel/ Motel/ B&B | 892,914 | $828,380 |
| Friends/ Relatives (VFR) | 108,786 | $70,023 |
| Vacation Rental | 184,262 | $233,944 |
| Day Trip (Regional) | 1,601,107 | $264,856 |
| Day Trip (Traveler) | 1,224,493 | $152,732 |
| Peer-to-Peer | 155,959 | $224,481 |
| Other | 14,811 | $6,974 |
| **Total Visitors** | **4,182,333** | **$1,781,389,264** |

| | January - March 2025 |
|---|---|
| | **Category Spend** |
| Lodging/ Accommodations | $625,372 |
| Restaurants/ Dining | $469,327 |
| Retail/ Shopping | $307,604 |
| Entertainment/ Sightseeing | $293,038 |
| Local Transportation | $60,979 |
| Car Rental | $23,719 |
| Other | $1,350 |
| **Total Direct Spending** | **$1,781,389,264** |

# Visitor Summary: Year-over-Year

# Year-over-Year Comparisons for Q1

## Average Days Between Decision to Visit & Arrival



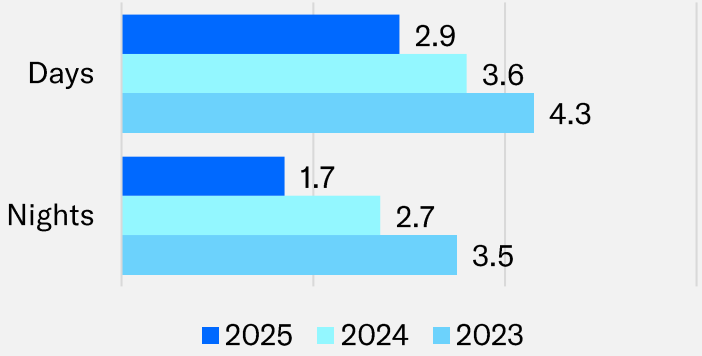

## Travel Party Size

**2.9**

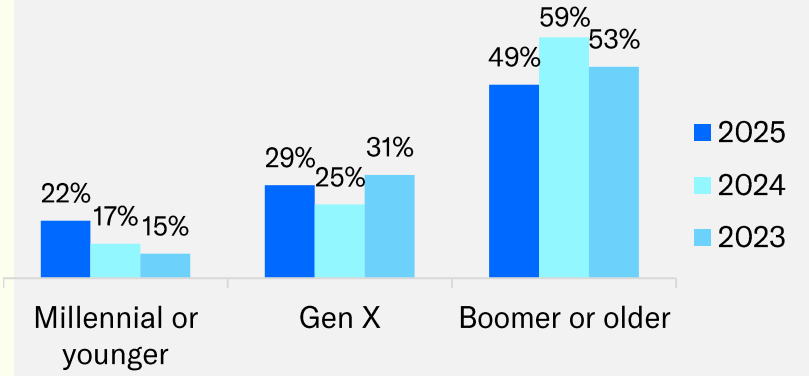
2025

| | |
|---|---|
| 2024 | 2.5 |
| 2023 | 2.2 |

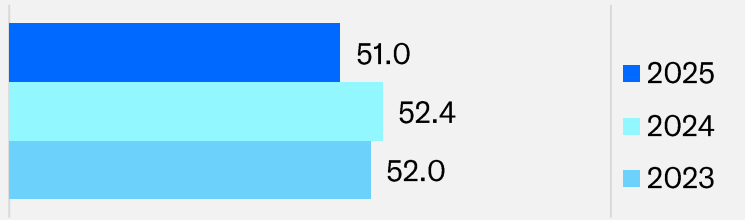
## Average Days & Nights




## Generation




## Average Age



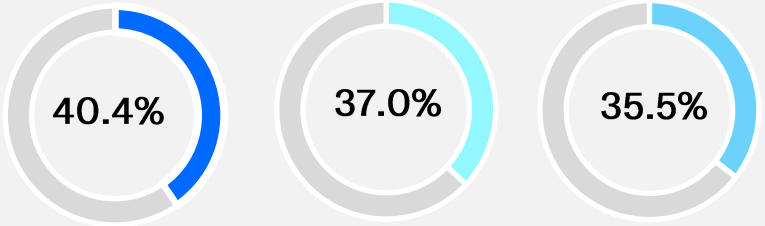

## Average Daily Spending Per Travel Party

**$330**

2025

| | |
|---|---|
| 2024 | $307 |
| 2023 | $333 |

## Overnight in Pinellas Co.




## Average Household Income

**$115,727**

2025

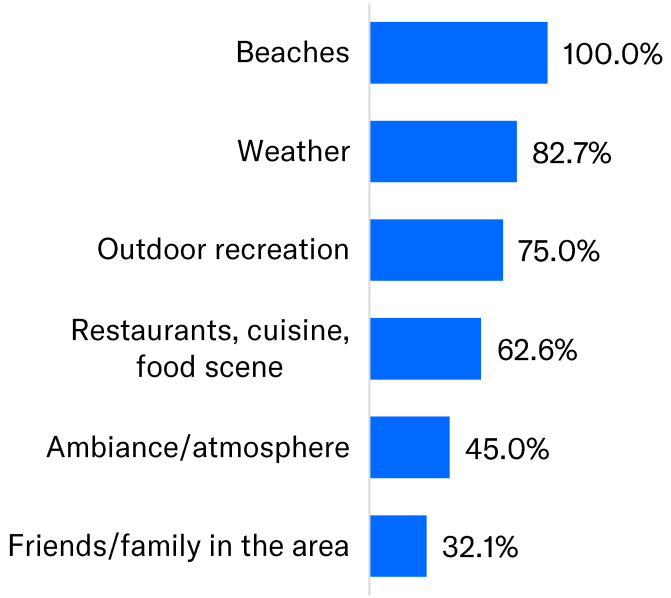
| | |
|---|---|
| 2024 | $104,327 |
| 2023 | $77,760 |

# Infographic: Traveler Segments

Future Partners

# Beach-goer

## Important Factors for Destination Selection




## Average Daily Spending Per Travel Party

**$394**

## Travel Party Size

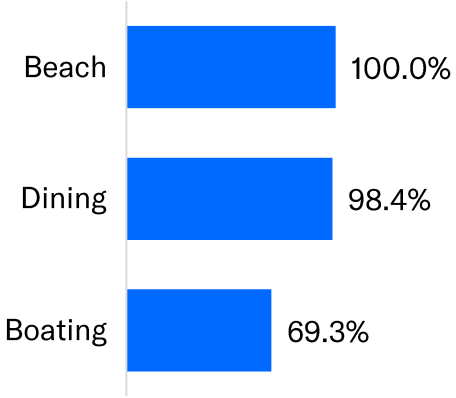
**3.1**

38.6% traveled with children

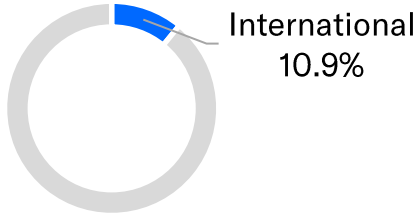
## Average Length of Stay

**4.5** days

## Top Activities




## International Visitation




## Origin States

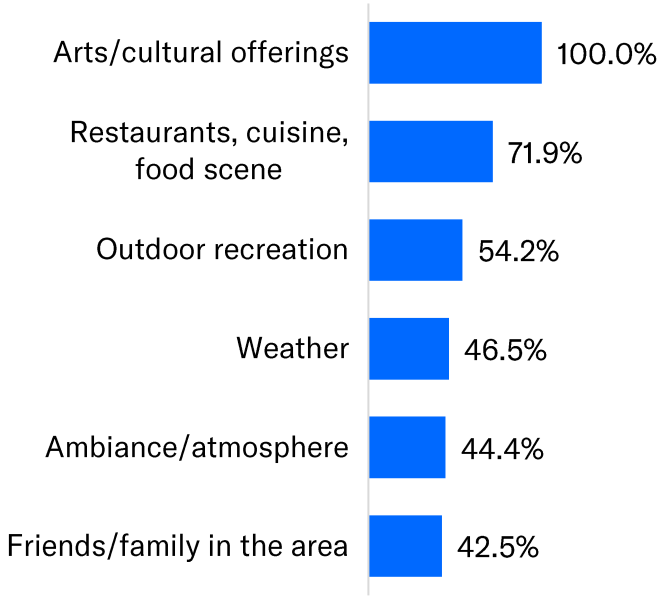
Florida – 17.3%
New York – 14.0%
Pennsylvania – 6.5%
Michigan – 6.5%
Ohio – 5.0%

## Communities Visited

Clearwater Beach – 67.5%
Madeira Beach – 58.1%
Tarpon Springs – 55.3%
St. Petersburg – 53.0%
Clearwater – 45.9%

# Arts & Culture Visitor

## Important Factors for Destination Selection




## Average Daily Spending Per Travel Party

**$363**

## Travel Party Size

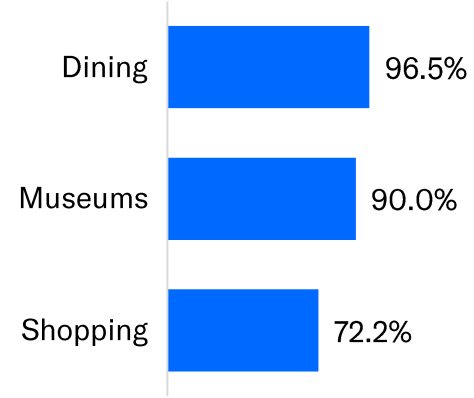
**2.7**

19.5% traveled with children

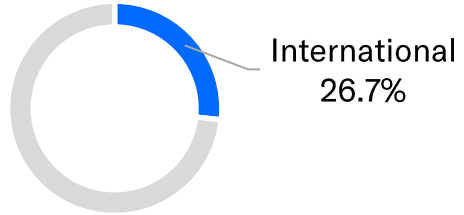
## Average Length of Stay

**3.1** days

## Top Activities




## International Visitation




## Origin States

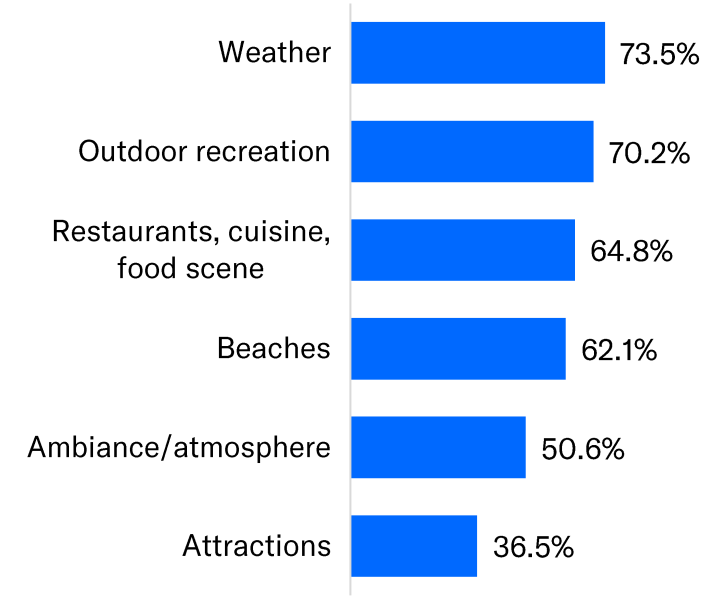
- Florida – 61.3%
- New York – 6.9%
- Ohio – 6.7%
- Maryland – 6.2%
- North Carolina – 2.9%

## Communities Visited

- St. Petersburg – 82.0%
- Tarpon Springs – 48.8%
- Dunedin – 45.5%
- Clearwater Beach – 41.9%
- Clearwater – 25.6%

# Affluent Traveler

## Important Factors for Destination Selection




## Average Daily Spending Per Travel Party

**$455**

## Travel Party Size

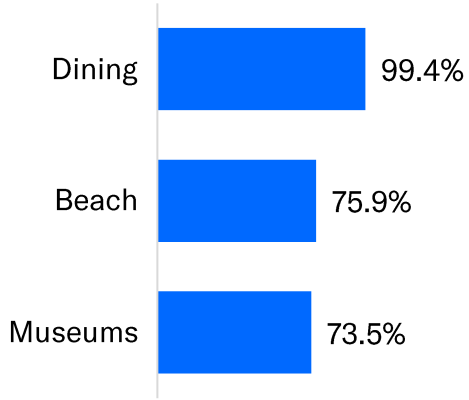
**3.0**

33.1% traveled with children

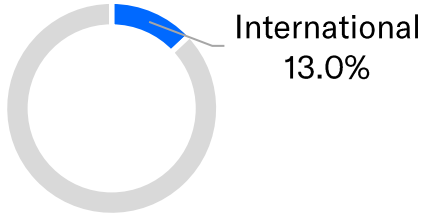
## Average Length of Stay

**4.4** days

## Top Activities




## International Visitation




## Origin States

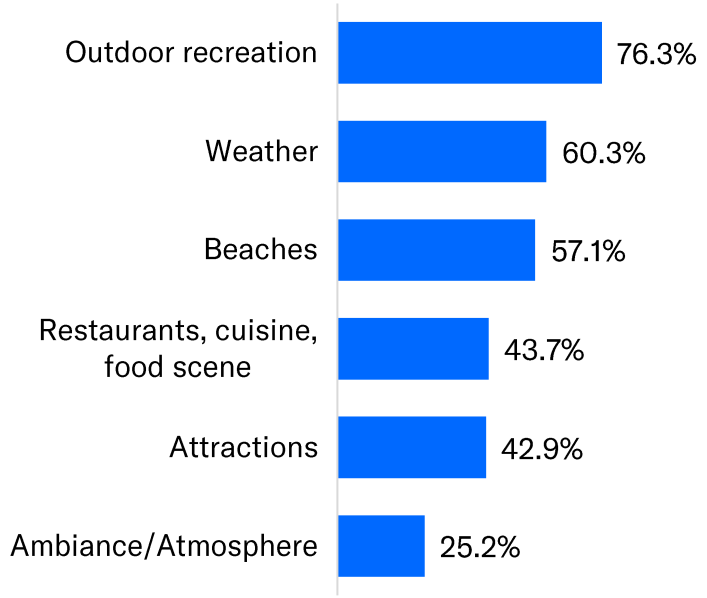
Florida- 11.0%
Michigan – 10.7%
Virginia- 8.6%
Pennsylvania- 7.9%
New York – 7.8%

## Communities Visited

Clearwater Beach – 63.3%
Tarpon Springs – 58.4%
St. Petersburg – 57.1%
Dunedin – 49.1%
Clearwater – 45.8%

# Family Traveler

## Important Factors for Destination Selection




## Average Daily Spending Per Travel Party

**$691**

## Travel Party Size

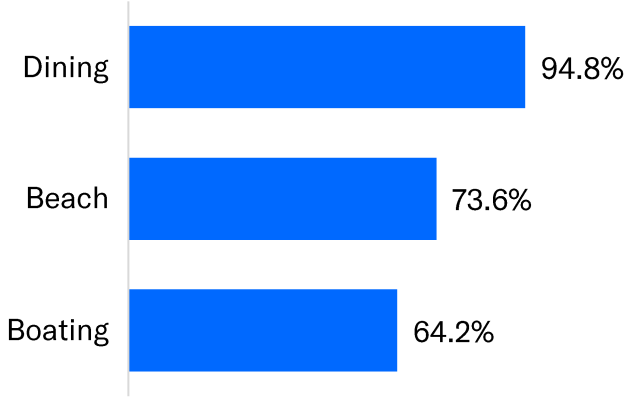
**4.2**

100% traveled with children

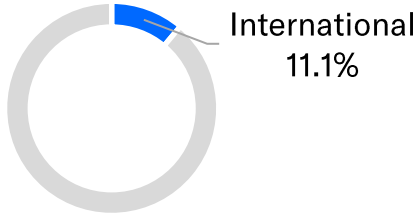
## Average Length of Stay

**3.0** days

## Top Activities




## International Visitation




## Origin States

Florida – 47.8%
New York – 8.1%
Michigan – 5.7%
New Jersey – 4.3%
Virginia – 3.6%

## Communities Visited

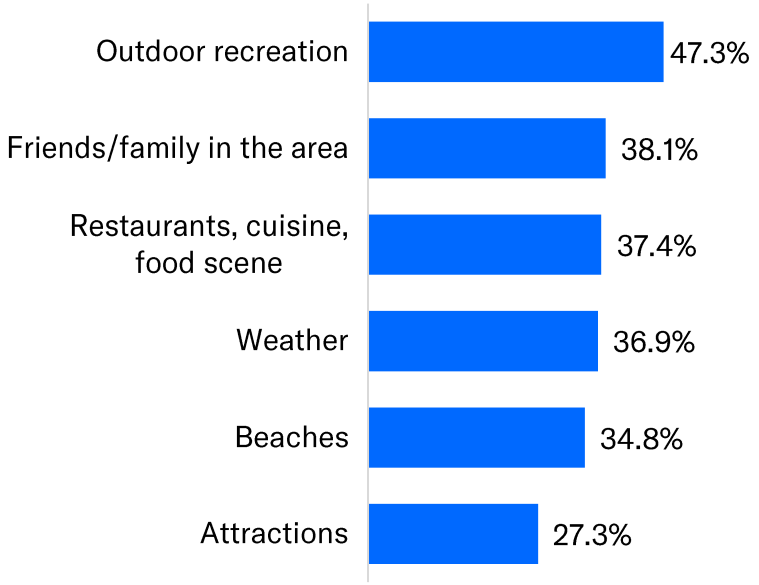
Clearwater Beach – 52.5%
St. Petersburg – 50.9%
Madeira Beach- 48.8%
Tarpon Springs – 42.3%
Clearwater – 40.1%

# Infographic: Generations

Future Partners

# Millennial Travelers

## Important Factors for Destination Selection




## Average Daily Spending Per Travel Party

**$291**

## Travel Party Size

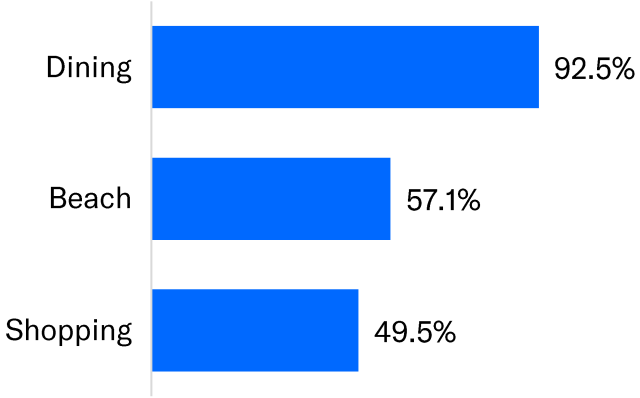
**3.1**

35.9% traveled with children

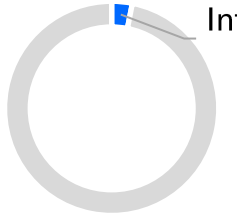
## Average Length of Stay

**2.2** days

## Top Activities




## International Visitation




## Origin States

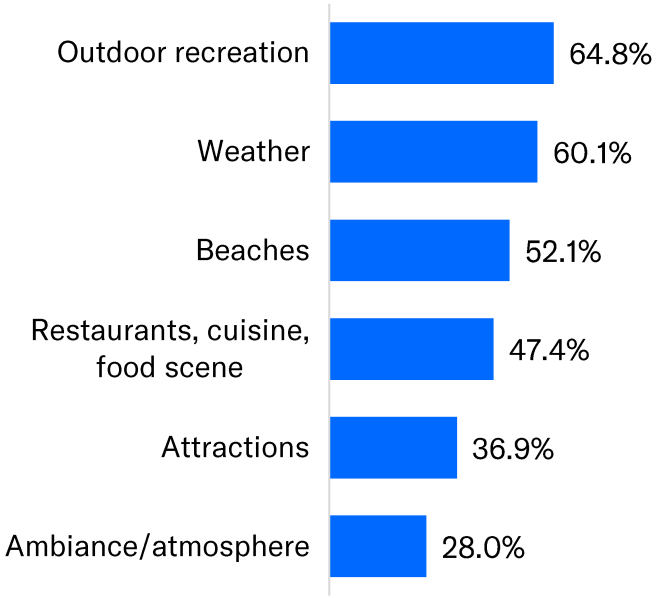
Florida – 53.3%
New York – 8.1%
Michigan – 4.3%
Wisconsin – 3.7%
Pennsylvania – 3.4%

## Communities Visited

St. Petersburg – 59.3%
Clearwater Beach – 40.9%
Madeira Beach – 28.8%
Clearwater – 22.3%
Dunedin – 17.7%

# Gen X Travelers

## Important Factors for Destination Selection




## Average Daily Spending Per Travel Party

**$371**

## Travel Party Size

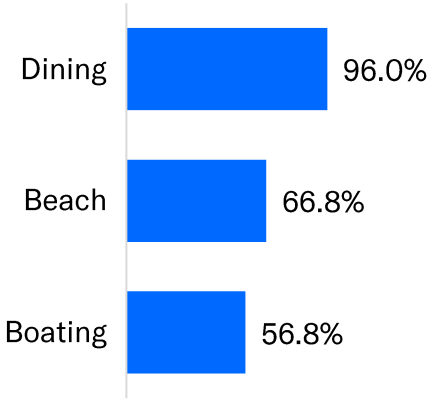
**3.4**

57.5% traveled with children

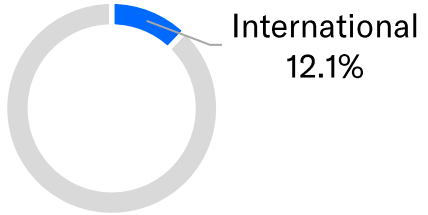
## Average Length of Stay

**3.4** days

## Top Activities




## International Visitation




## Origin States

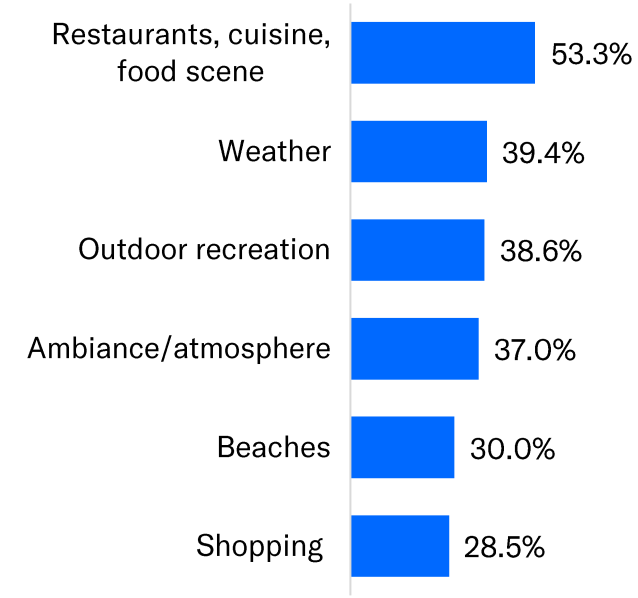
Florida – 33.4%
New York – 9.5%
Michigan – 7.6%
Virginia – 4.4%
Illinois – 4.3%

## Communities Visited

St. Petersburg – 54.0%
Clearwater Beach – 52.7%
Tarpon Springs – 46.9%
Madeira Beach - 44.9%
Clearwater – 40.7%

# Boomer Travelers

## Important Factors for Destination Selection




## Average Daily Spending Per Travel Party

**$319**

## Travel Party Size

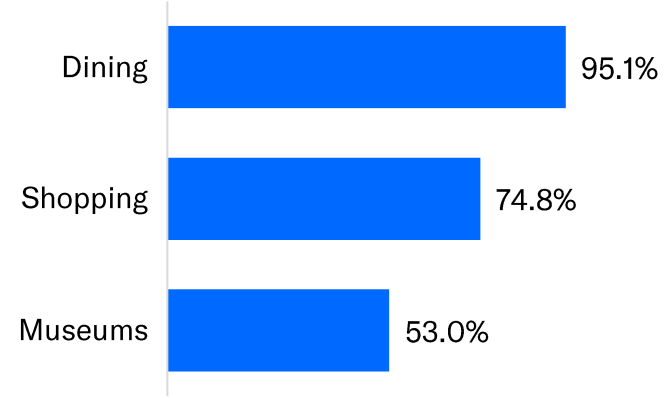
**2.5**

1.6% traveled with children

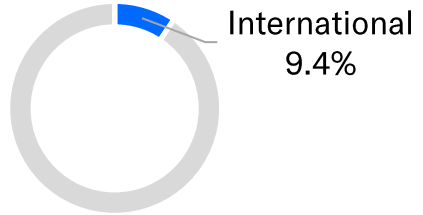
## Average Length of Stay

**2.8** days

## Top Activities




## International Visitation




## Origin States

Florida – 45.3%
Michigan – 5.8%
New York – 5.4%
Minnesota – 4.0%
Ohio – 4.0%

## Communities Visited

St. Petersburg – 56.1%
Clearwater Beach – 35.9%
Dunedin – 31.0%
Madeira Beach – 30.8%
Tarpon Springs – 28.8%

# Detailed Findings: Trip Planning

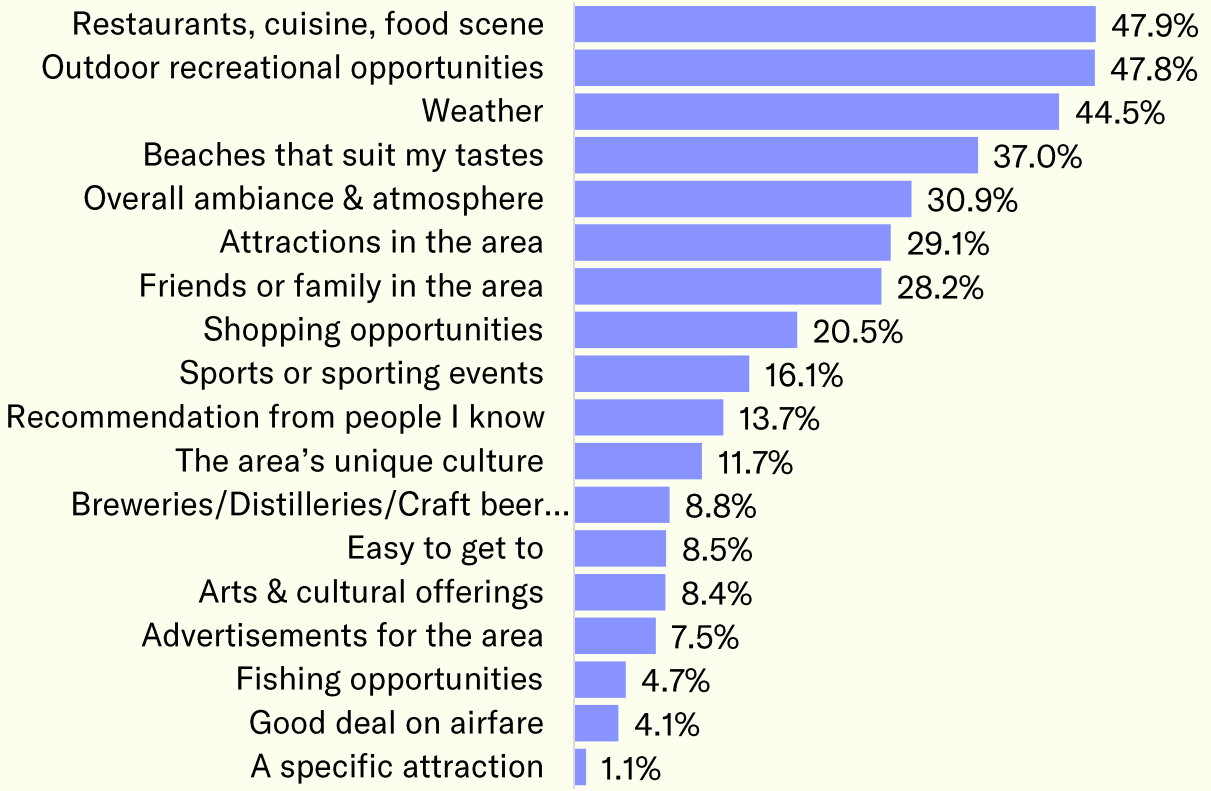
# Visitors made the decision to visit St. Pete/Clearwater nearly two months prior to arrival.

Restaurants, outdoor recreation, weather, and beaches were the most important factors in the decision to visit St. Pete/Clearwater.

## Decision-making Timeframe

**59.3 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?

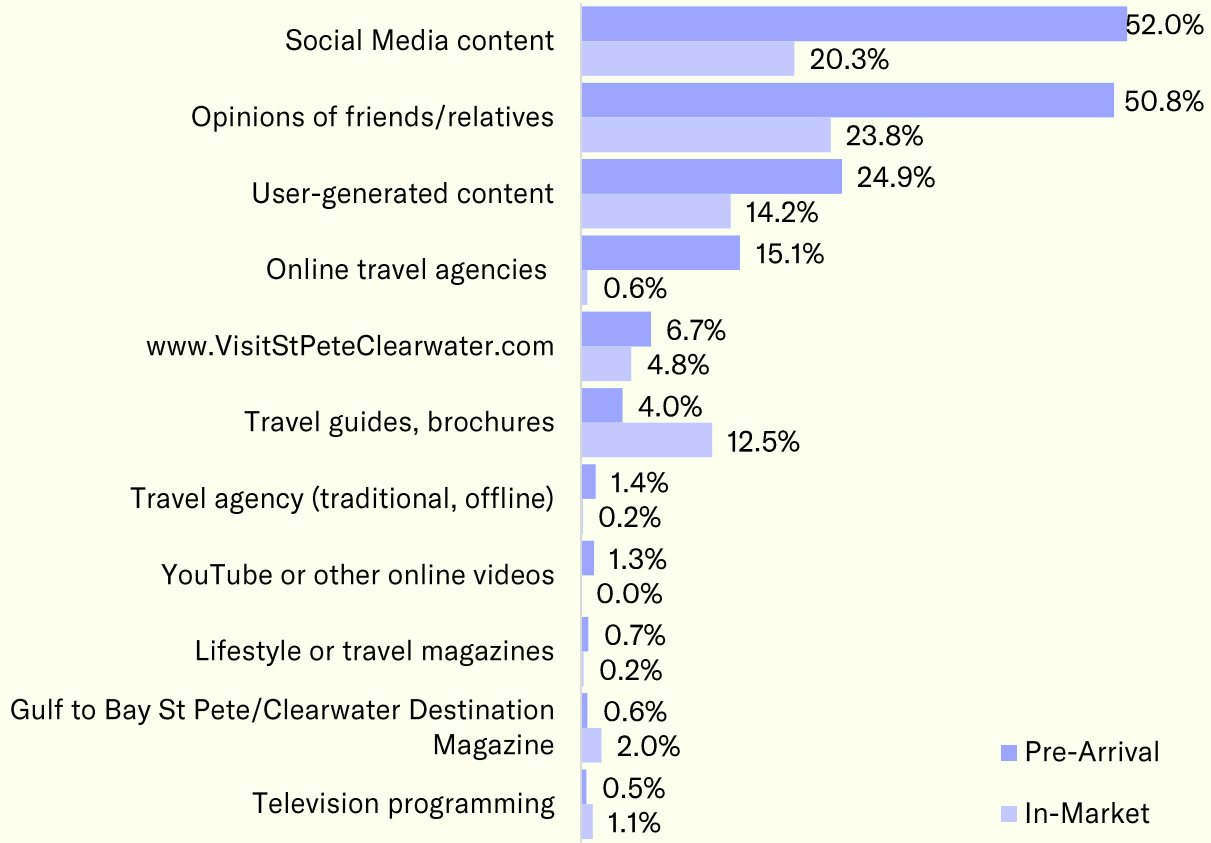
Question: Which of the following were IMPORTANT to your decision to take this trip to the St. Pete/Clearwater area? (Select all that apply)

Base sizes: Total visitors (1374 – 1424)

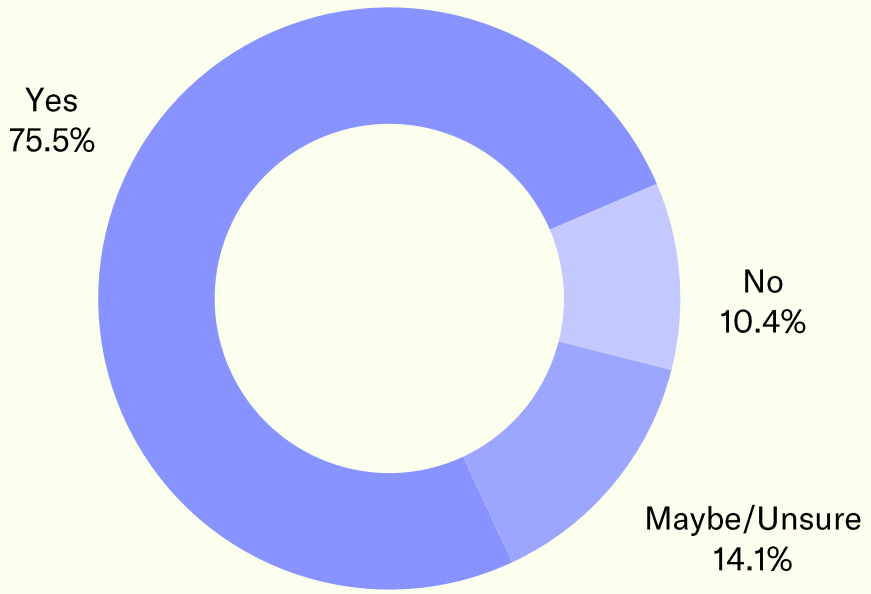
# Social media was the most used resource before arriving in St. Pete/Clearwater, while opinions of friends and relatives were used most in market.

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?

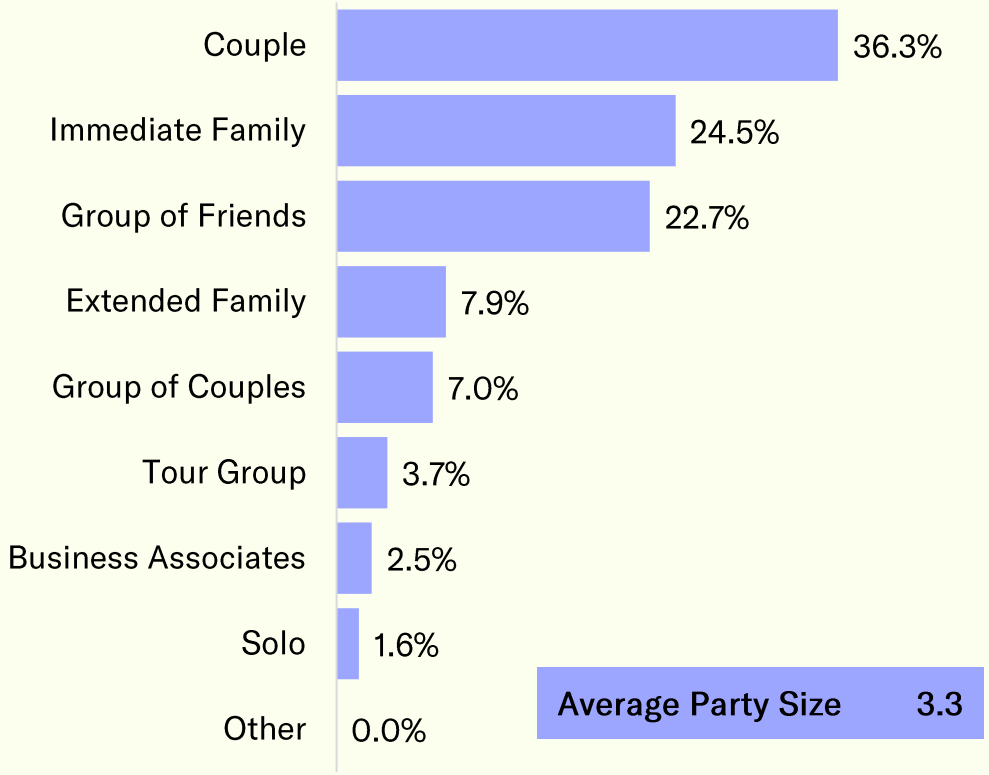
Base sizes: Total visitors (1424)

# Detailed Findings: Trip Details

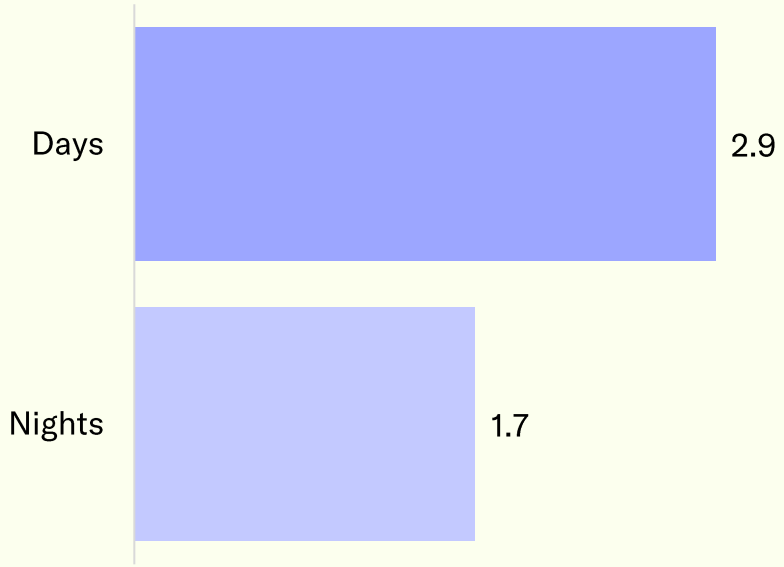
# Most visitors to St. Pete/Clearwater travel as a couple or with their immediate family, with an average party size just over three people.

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

## Travel Party Composition




## Length of Stay




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?

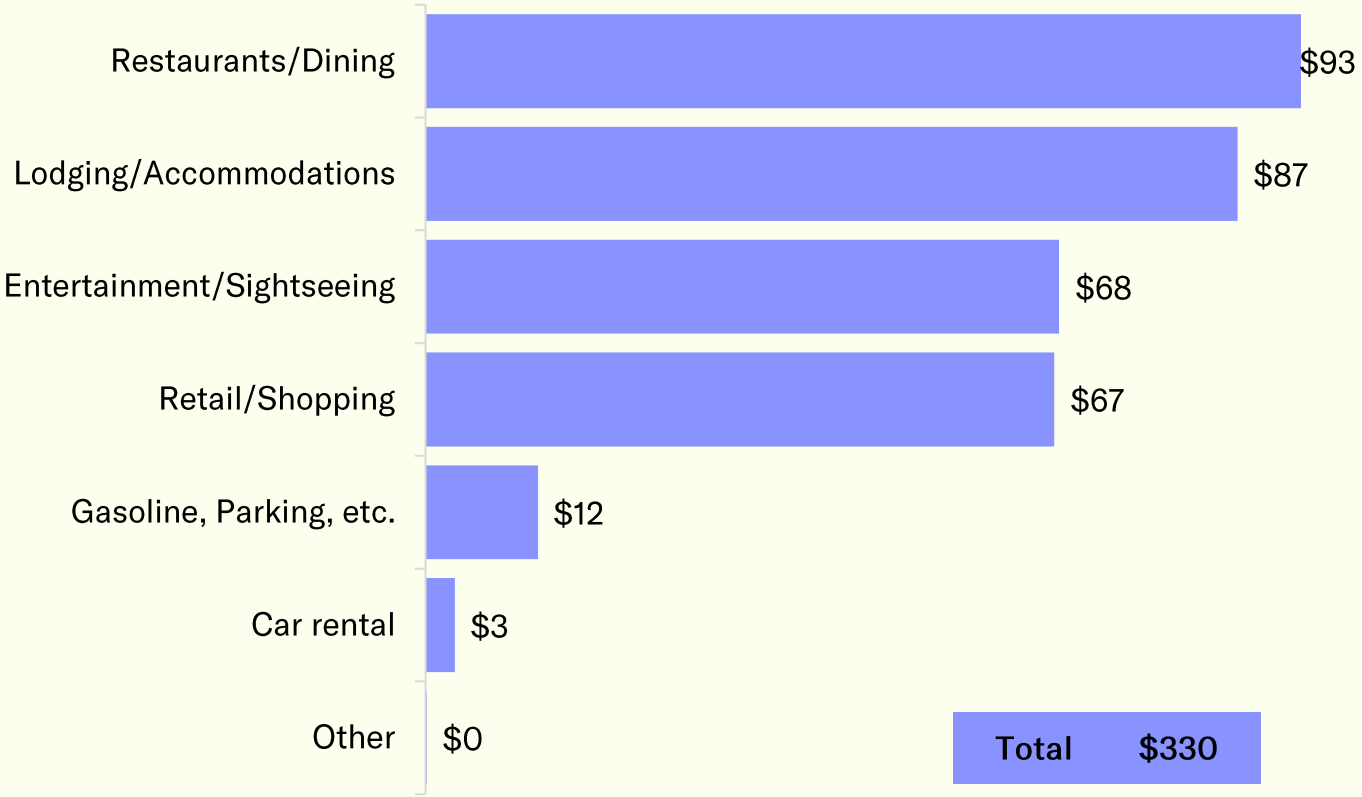
Question: How many total days and nights did you, or will you, stay in the St. Pete/Clearwater area on this trip?

Base sizes: Total visitors (1339-1424)

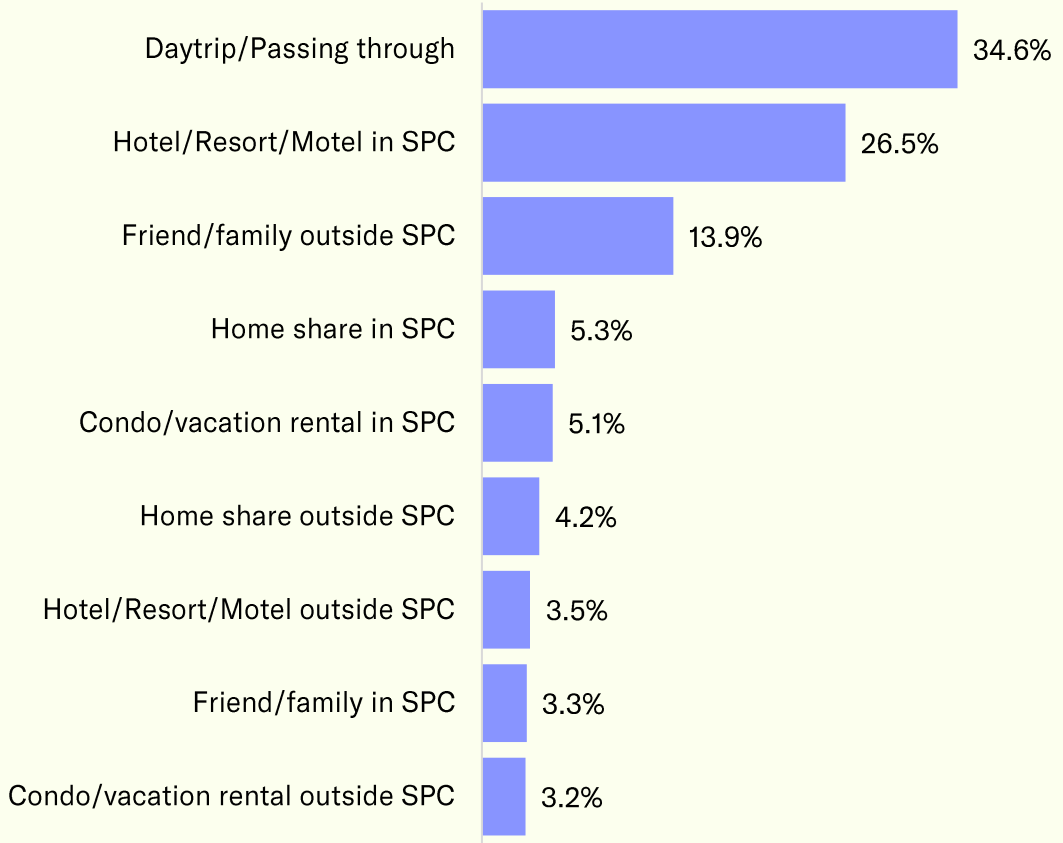
# Visitors spent an average of $330 per day, with restaurants/dining and lodging/accommodations being the largest expenses.

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

## Average Daily Spend per Party




## Lodging/Accommodations



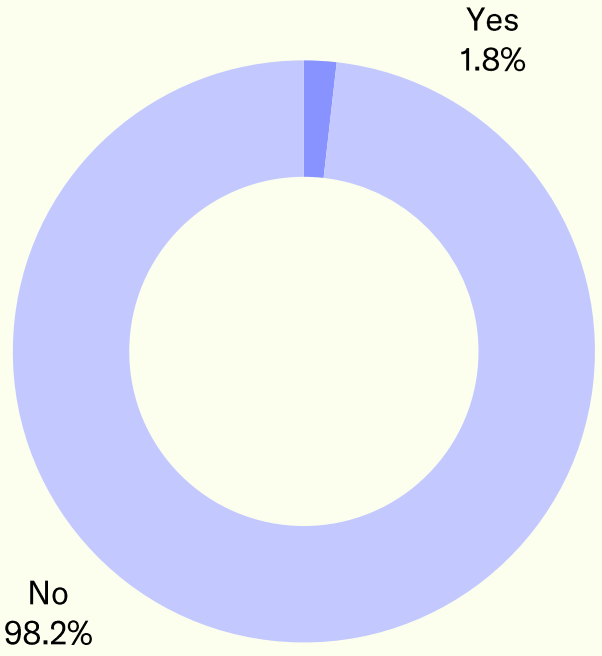

Question: PER DAY, approximately how much will you spend on each of the following while in the St. Pete/Clearwater area?

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

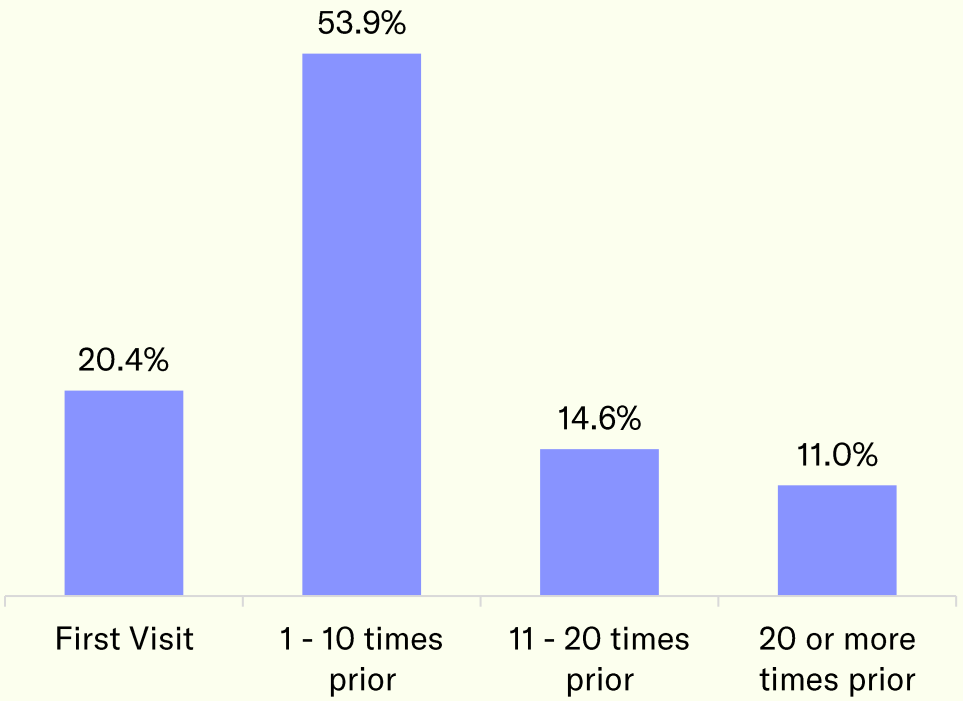
Base sizes: Total visitors (1419-1424)

# Most visitors had been to Florida previously, and among those who had, all but one-in-five had been to St. Pete/Clearwater before.

## First Visit to Florida




## Previous Visitation to St. Pete/Clearwater




| Average Number of Previous Visits | 8.0 |
|---|---|

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?

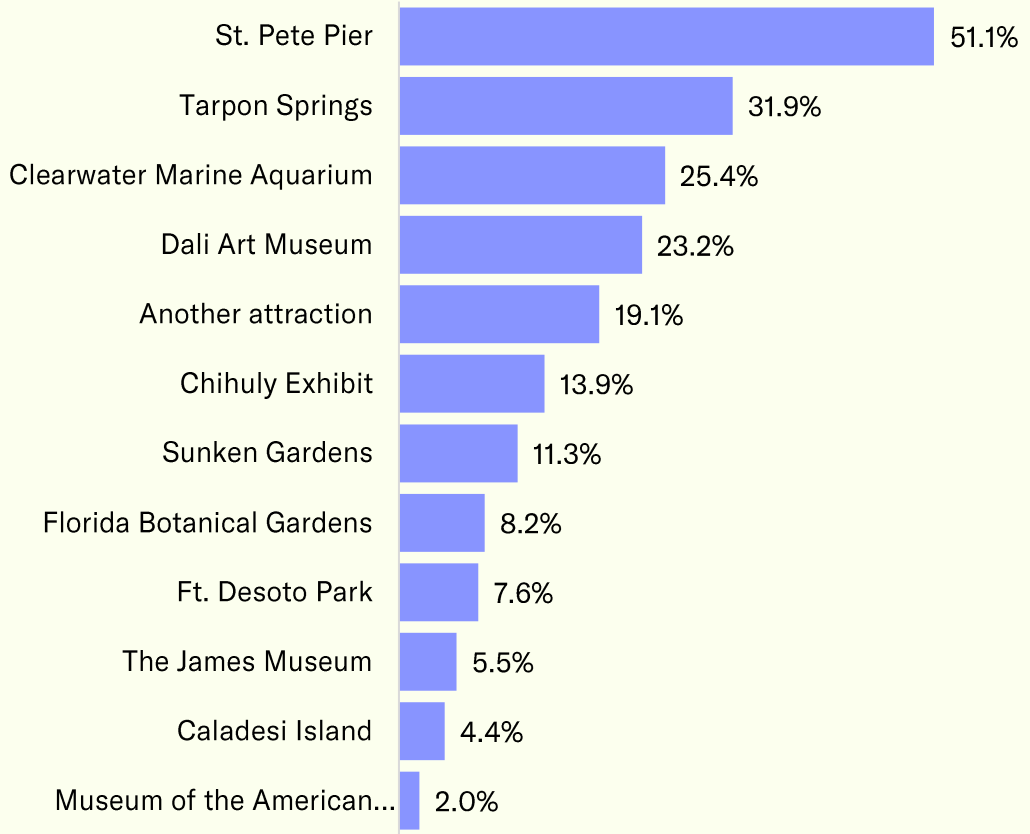
Base sizes: Total visitors (1424) | Previously visited Florida (1408)

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

St. Pete Pier was the most visited attraction, followed by Tarpon Springs and the Clearwater Marine Aquarium.

## Trip Activities

## Attractions Visited

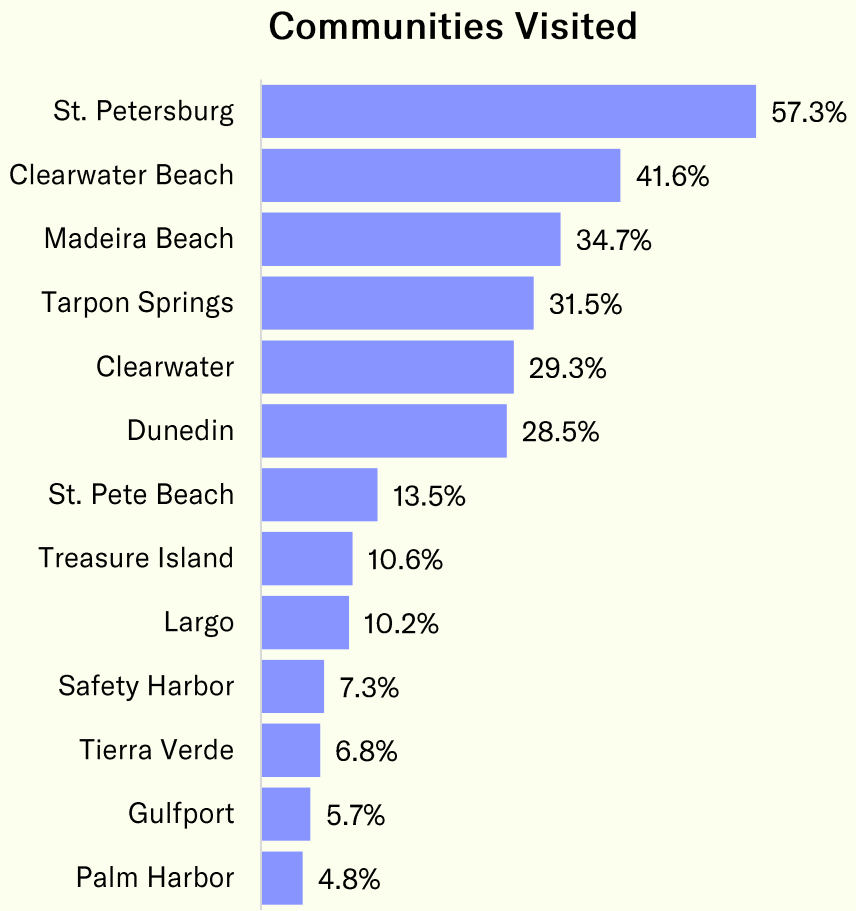



Question: Which of these activities did you, or will you, participate in while in the St. Pete/Clearwater area? (Select all that apply)

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

Base sizes: Total visitors (1424, excludes “None of these”)

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



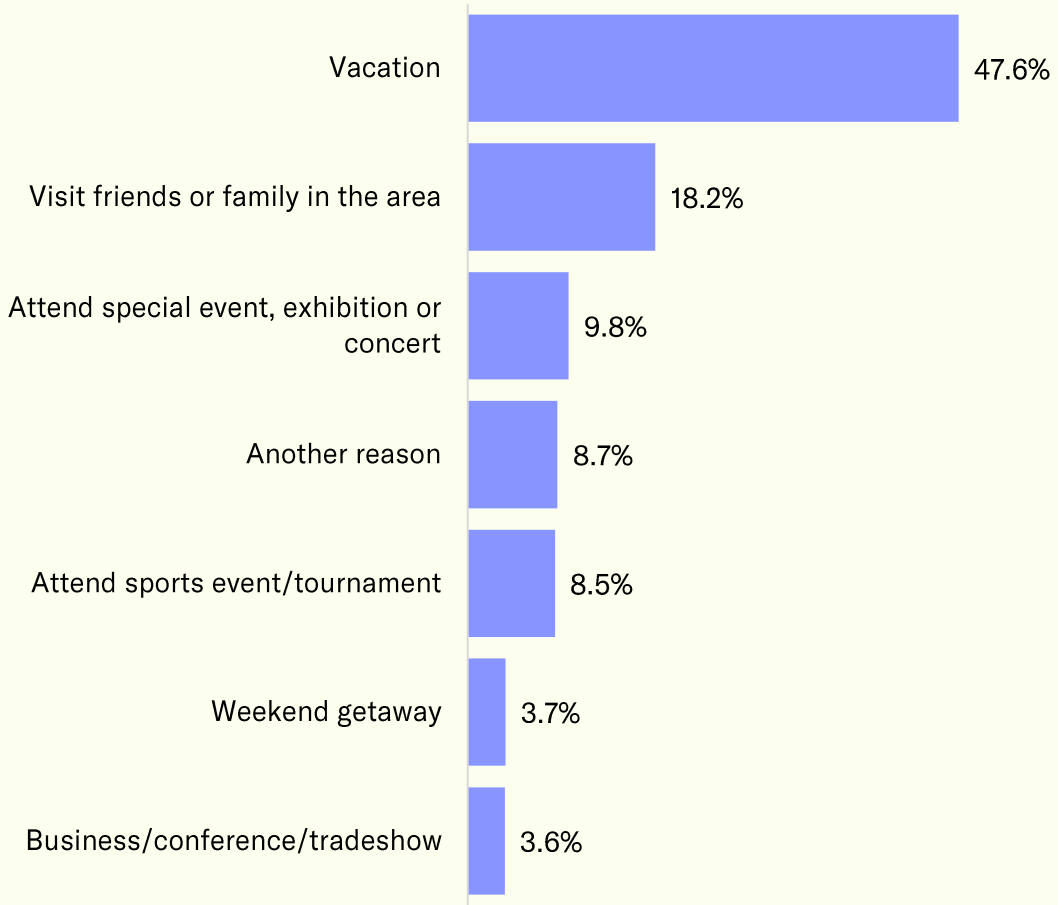

Question: Which of the following communities in the St. Pete/Clearwater area did you visit? (Select all that apply)

Base size: Total visitors (1424)

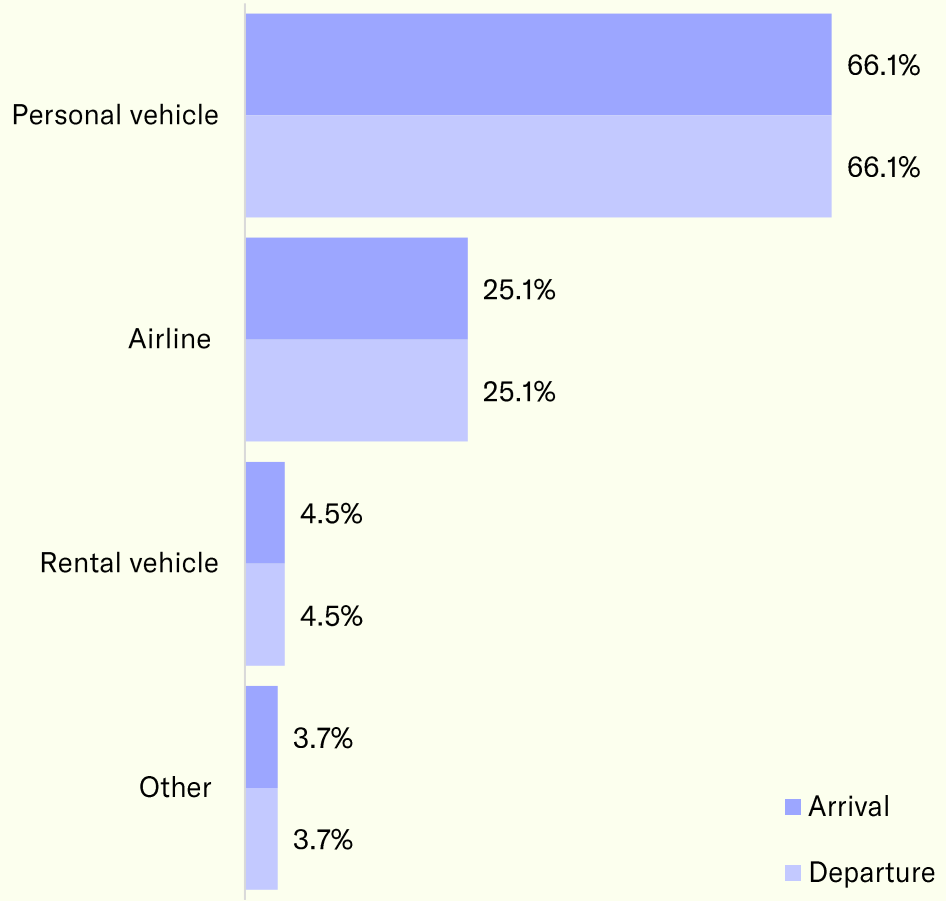
# Most visitors came to St. Pete/Clearwater for vacation.

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

## Primary Reason for Visit




## Method of Arrival & Departure

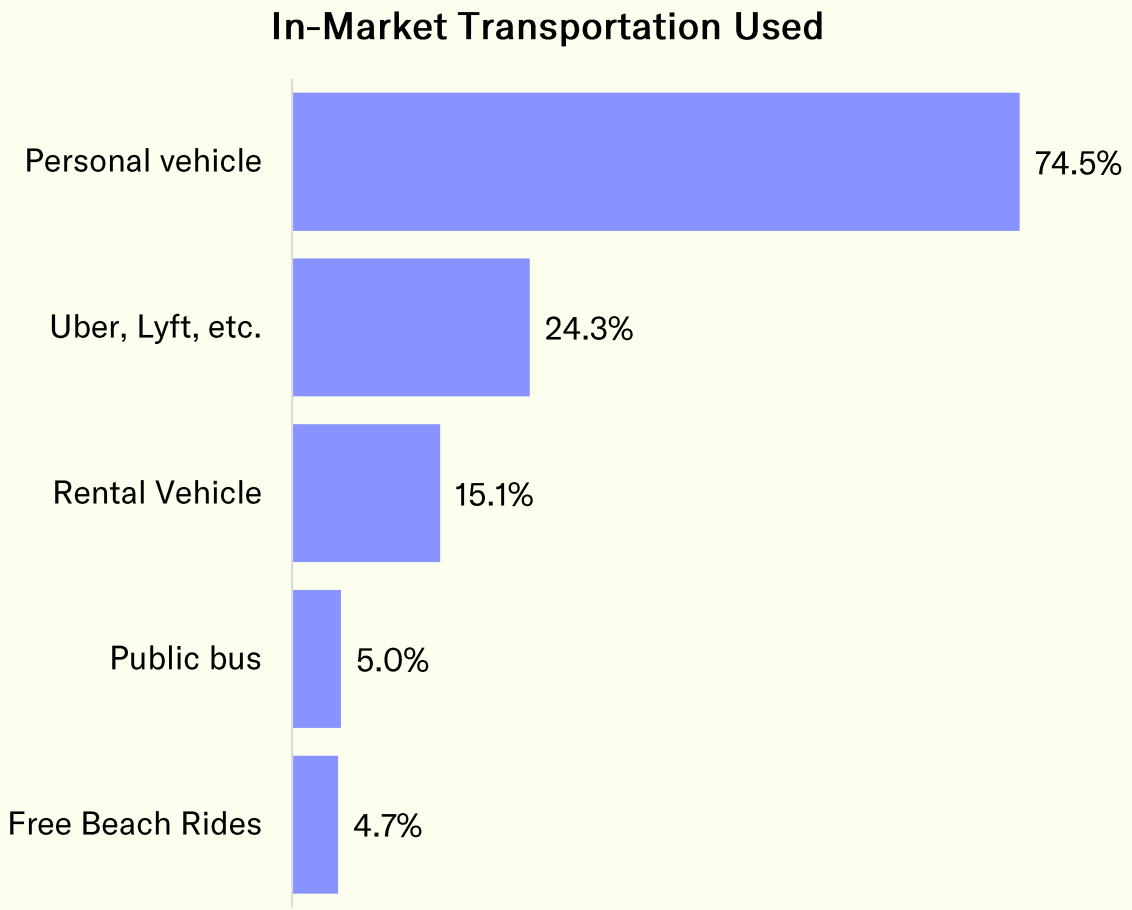



Question: What is your primary reason for visiting the St. Pete/Clearwater Area?

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

Base sizes: Total visitors (1424)

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

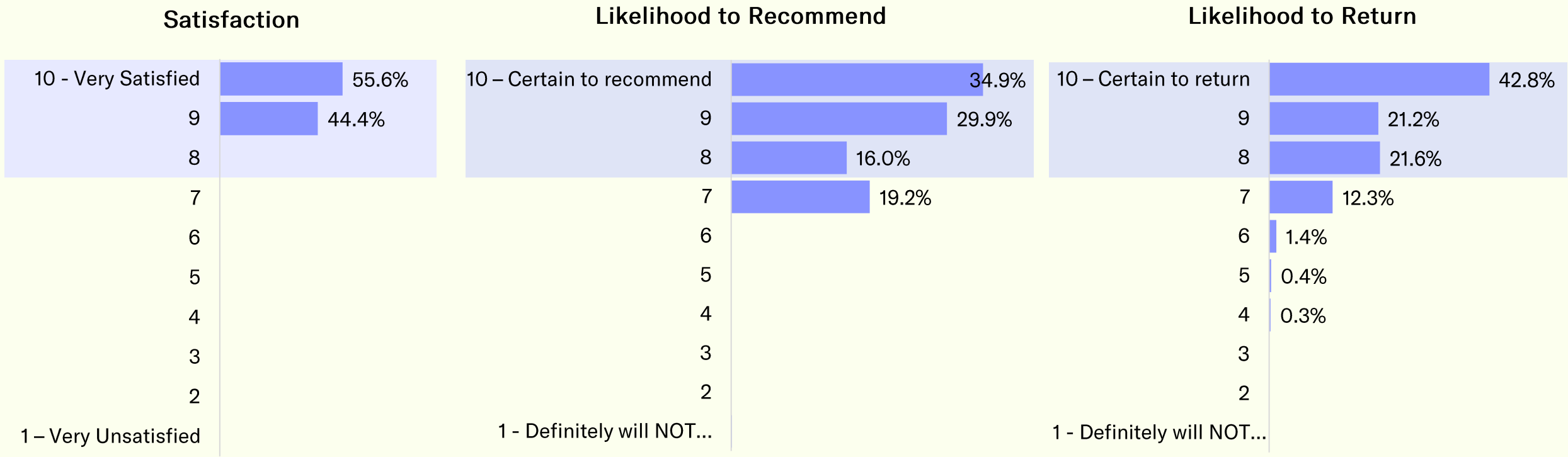



Question: Which modes of transportation did you, or will you, use while in the St. Pete/Clearwater area?

Base sizes: All visitors (1424)

# 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.




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

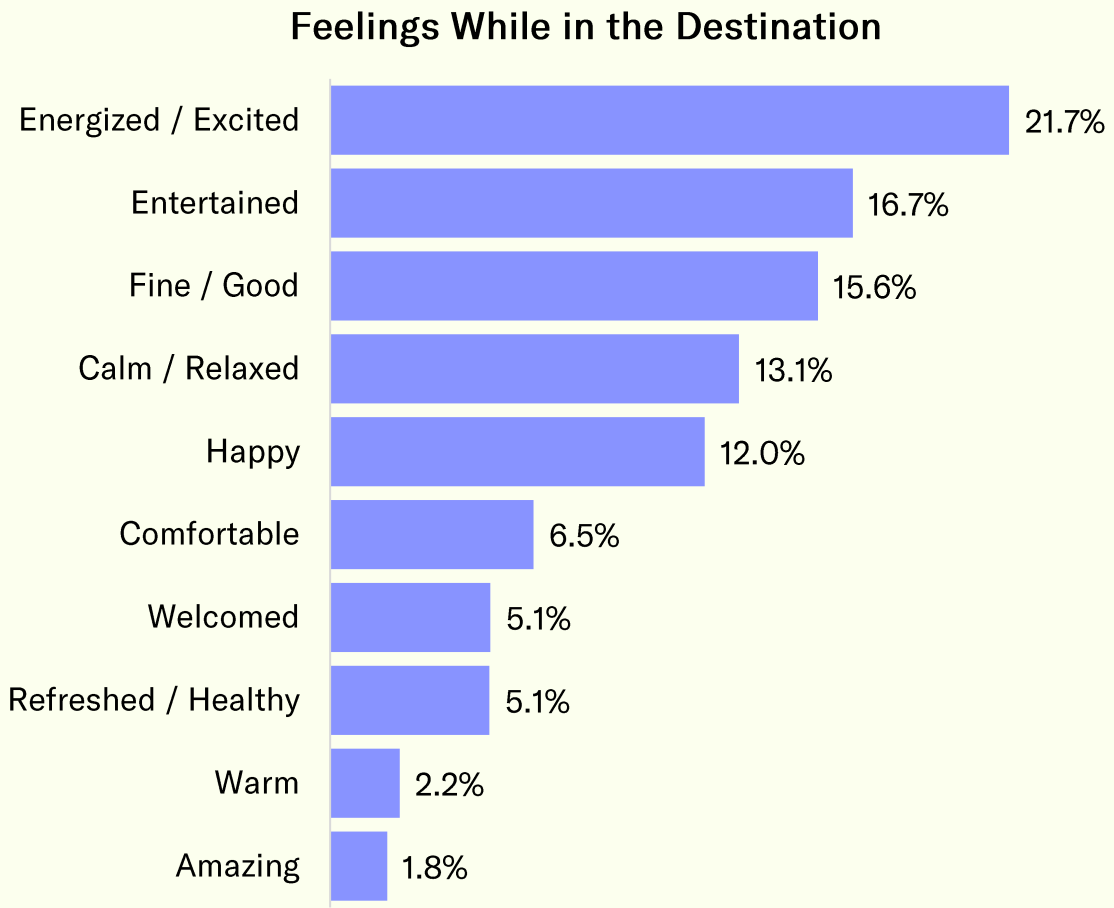
Question: How likely are you to recommend the St. Pete/Clearwater area as a place to visit to other travelers?

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

Base size: Total visitors (1424)

# Feelings while in the St. Pete/Clearwater area

Respondents mostly felt energized/excited and entertained while in the destination.



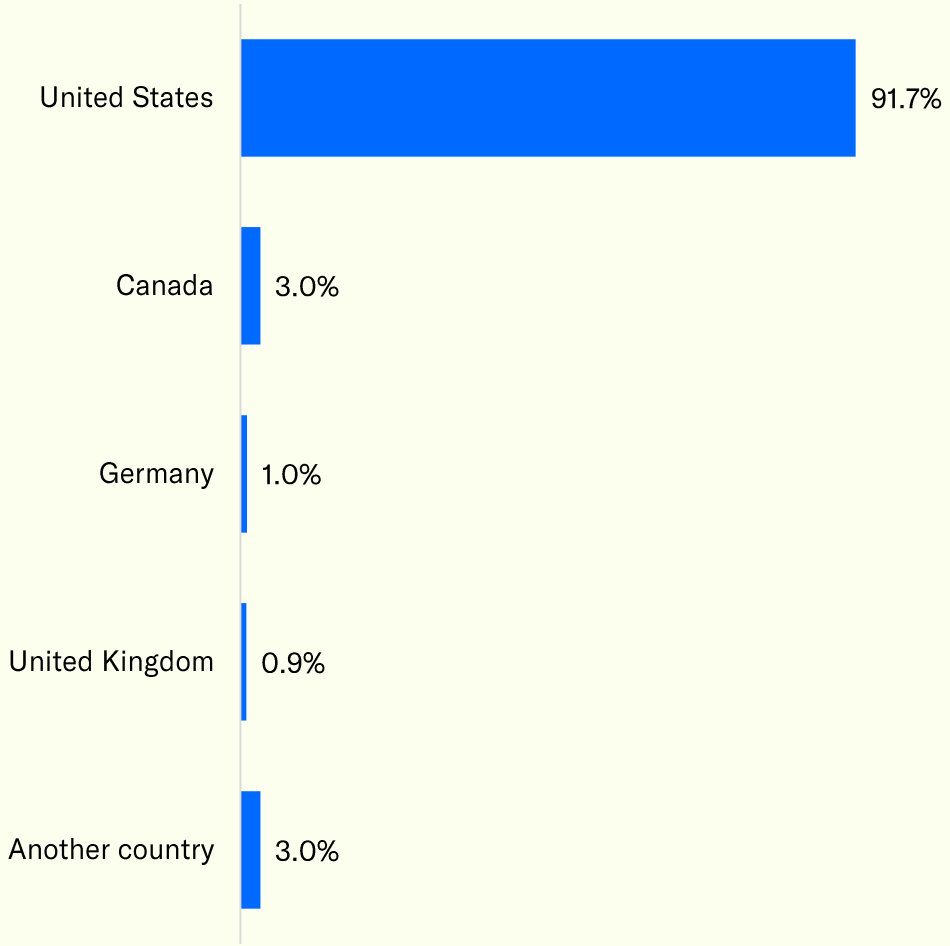

Question: What one word of phrase best describes how you feel in the St. Pete/Clearwater area?

Base sizes: All visitors (1424)

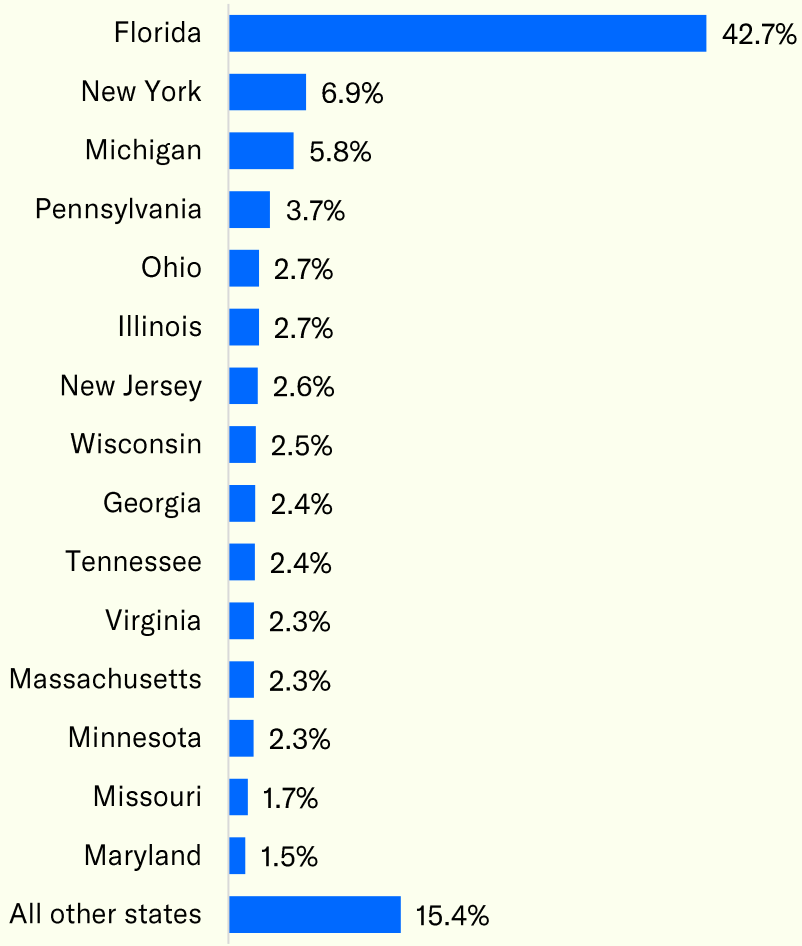
# Demographics

# Origin Market

## Country of Origin

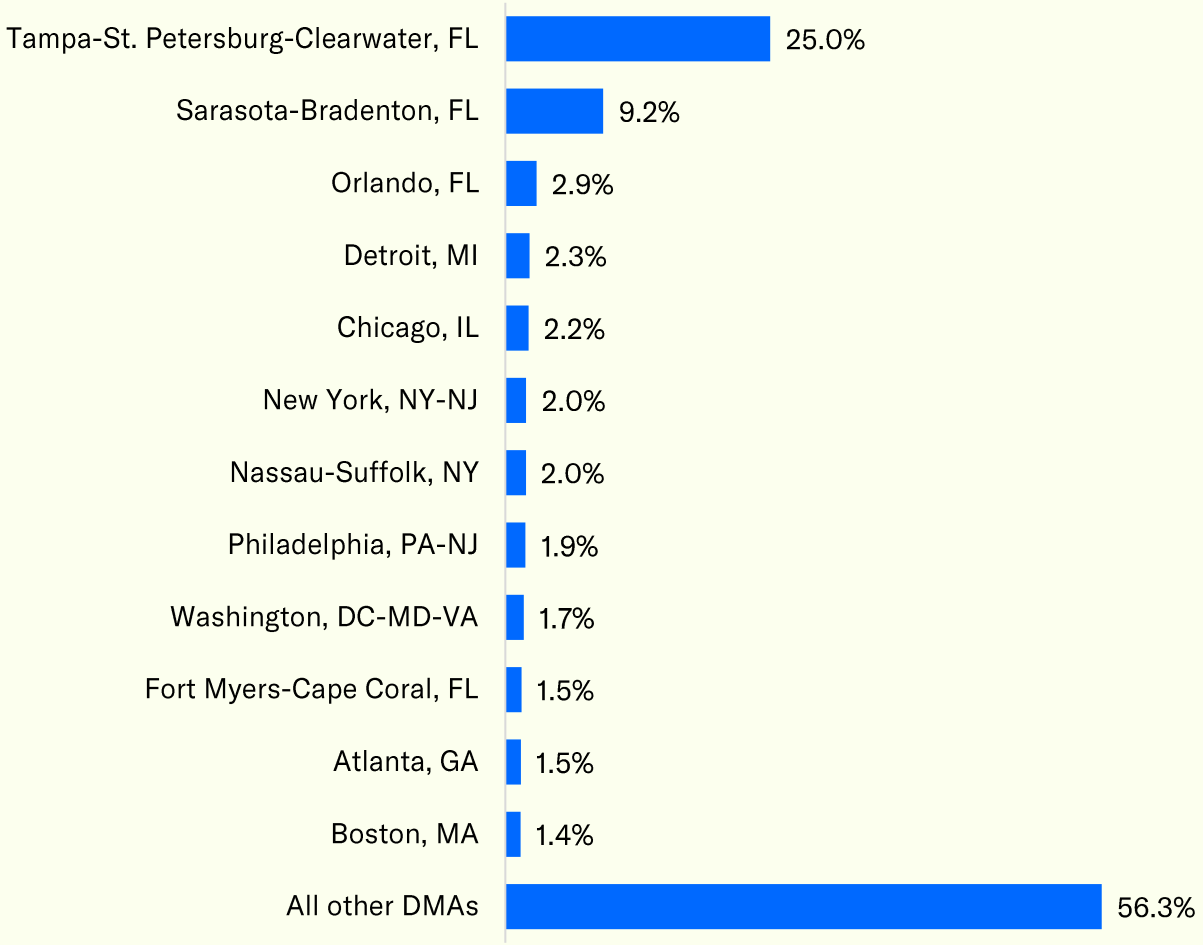



## U.S. State of Origin



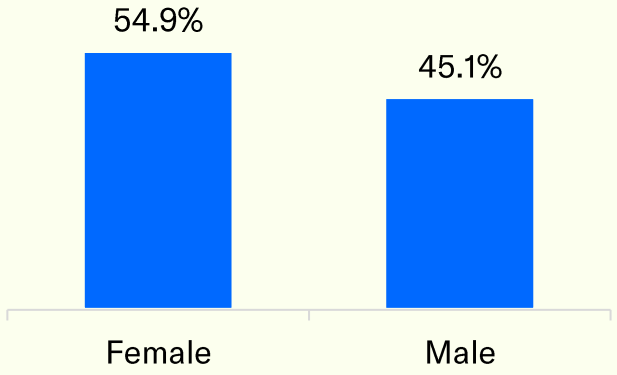
# Origin Market

MSA of Origin

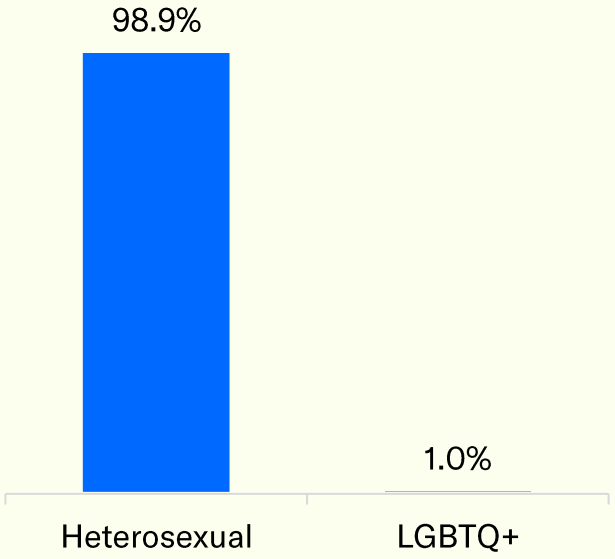


# Demographics

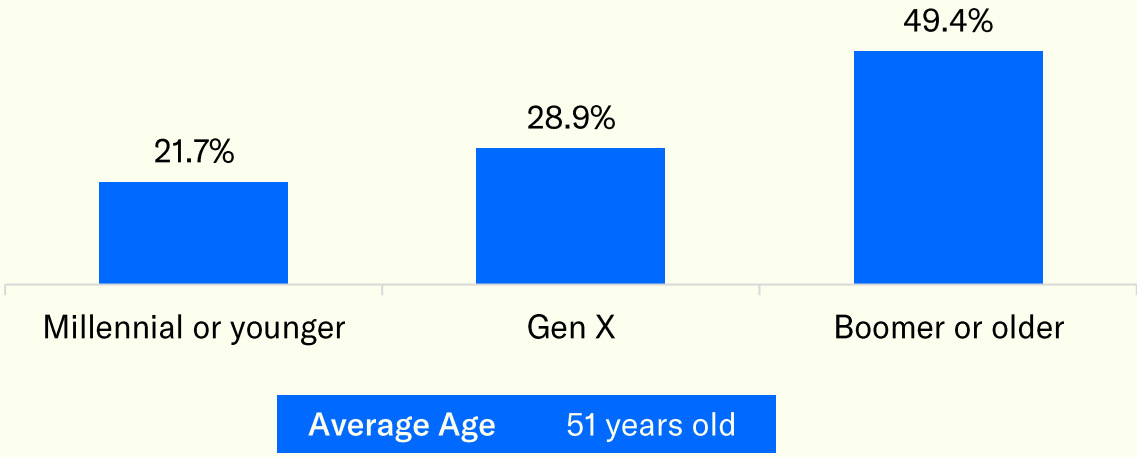
## Gender




## Orientation



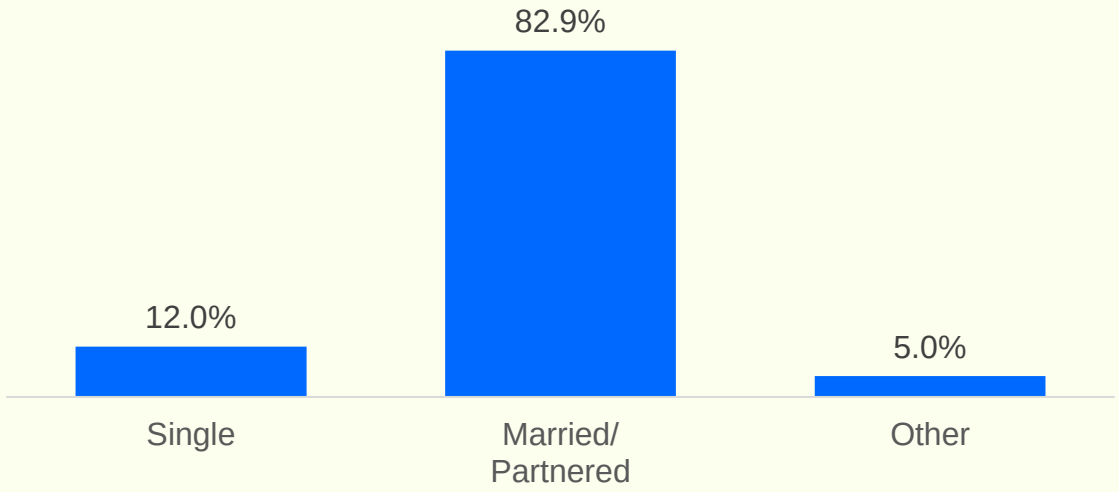

## Generation




**Average Age** 51 years old

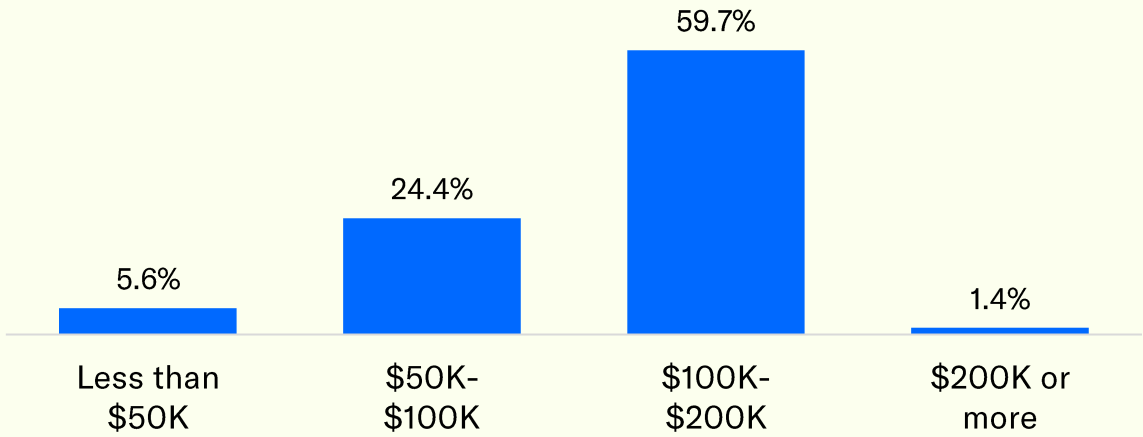
# Demographics

## Marital Status

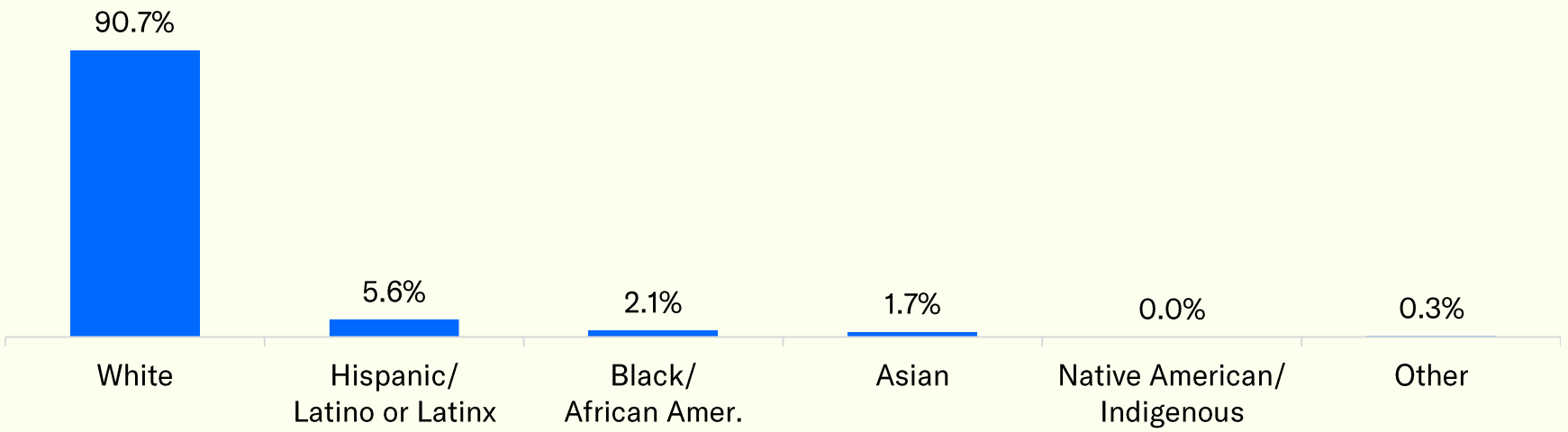



| Children in Household | 24.0% |
|---|---|

## Household Income




| Average HHI | $115,727 |
|---|---|

# Demographics

Ethnicity/Racial Identity