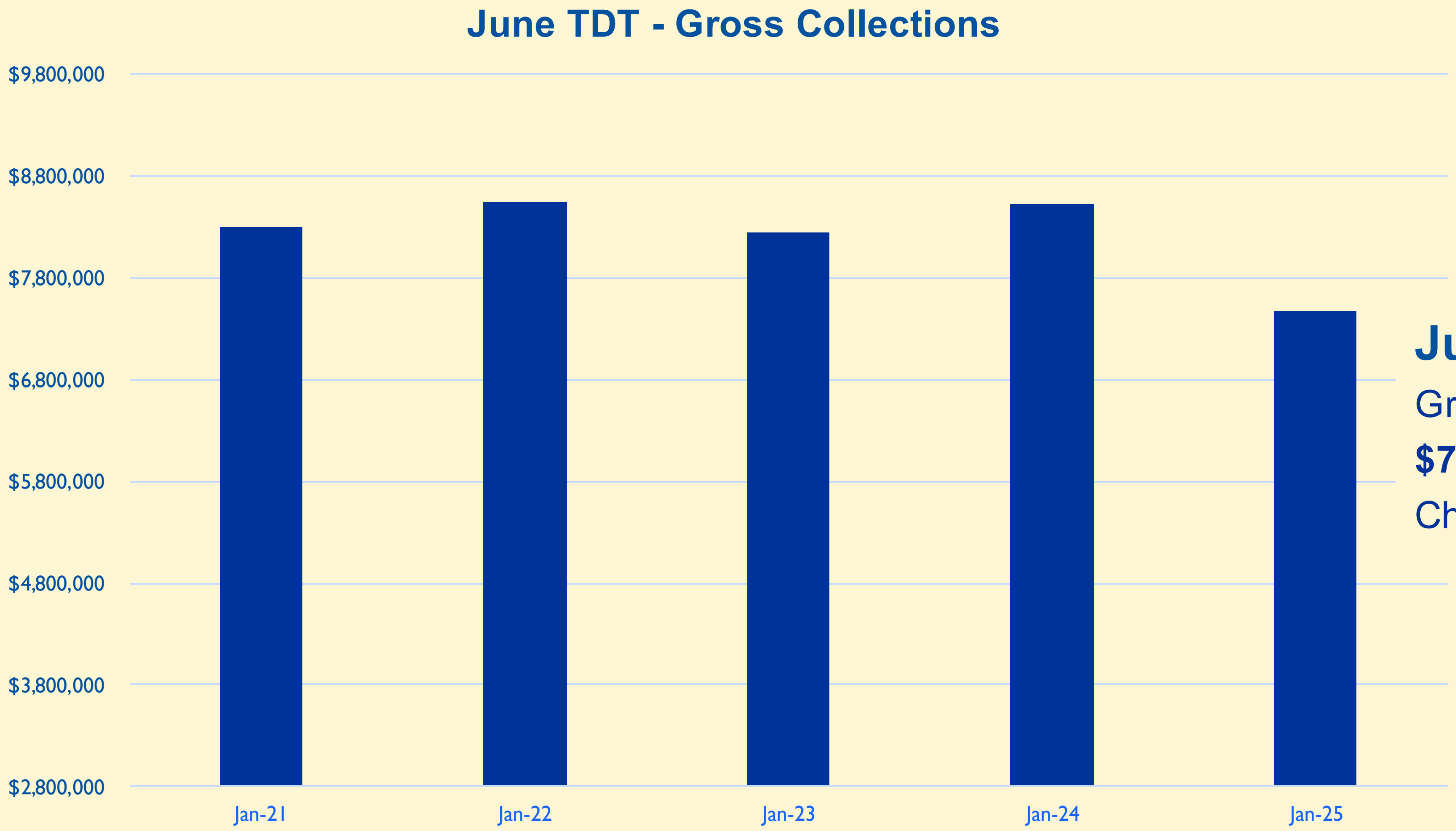
DESTINATION METRICS

June 2025

ST.PETE CLEARWATER, FL

Tourist Development Tax



June 2025

Gross tax collections:

$7,479,220.36

Change from 2024: **-12.22%**

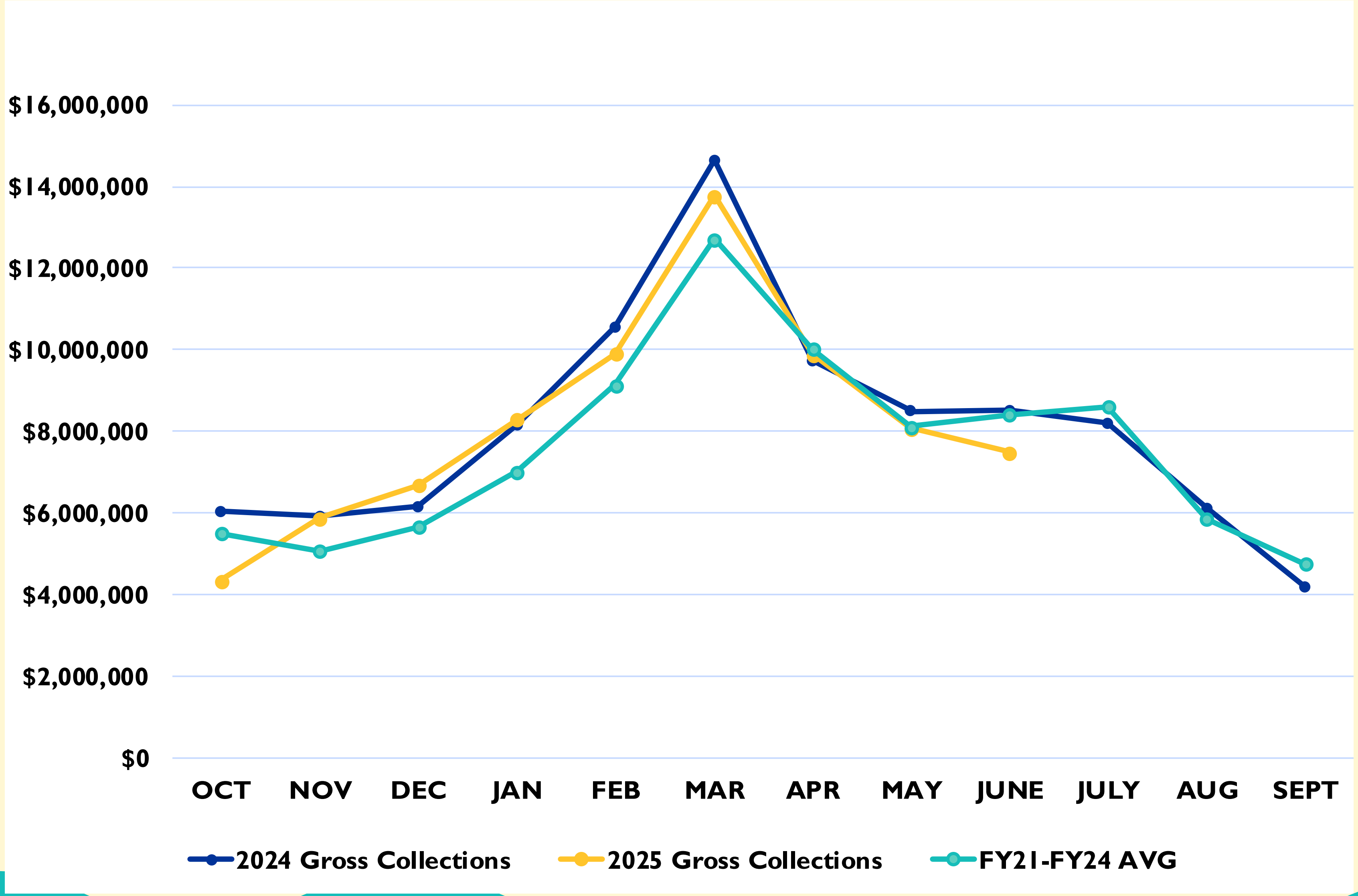
Sources: Pinellas County Tax Collector

TDT Local Option – June TDT

Local Option Tax	June 2024 Tax Collected	June 2025 Tax Collected	Local Option Change from FY24	Local Option FY25 Difference from FY24
Vacation Rental/MISC	$3,255,734.70	2,678,030.41	-17.7%	($577,704.29)
St. Pete Beach	$1,127,862.47	806,327.03	-28.5%	($321,535.44)
Indian Rocks/Indian Shores/ Madeira/Belleair Beach	$467,276.64	$352,987.05	-24.5%	($114,289.59)
Treasure Island	$370,054.94	284,647.16	-23.1%	($85,407.78)
Tarpon Springs/Oldsmar/Palm Harbor/Safety Harbor	$195,032.27	$134,330.66	-31.1%	($60,701.61)
Dunedin	$77,459.18	94,053.98	21.4%	$16,594.80
St. Pete	$740,828.16	802,191.23	8.3%	$61,363.07
Clearwater/Clearwater Beach	$2,250,008.68	2,325,238.17	3.3%	$75,229.49

Sources: Pinellas County Tax Collector – Local Option Report

Tourist Development Tax Snapshot



FY25

Gross tax collections to date:

$74,314,024

Change from 2024: **-5%**

Sources: Pinellas County Tax Collector

Top 25 Hotel Feeder Markets

Top 25 Markets
Calendar Year to Date

Total Check ins:
-2.9%

Average Length of Stay:
1.7%

Market Area	Checkin Change from 2024	Revenue Change from 2024
Tampa-St. Petersburg-Clearwater	3.3%	7.6%
New York	-8.5%	-9.6%
Orlando	-6.6%	-2.9%
Chicago	-7.4%	-8.4%
Philadelphia	-4.4%	-5.2%
Miami	-7.3%	-5.0%
Atlanta	-5.6%	-7.2%
Washington	-2.9%	-5.0%
Boston	-2.6%	-4.7%
Detroit	-7.6%	-8.6%
Jacksonville	-4.5%	-3.3%
Dallas-Fort Worth	-1.8%	2.0%
Minneapolis	-6.4%	-7.3%
Bradenton-Sarasota-Venice	10.3%	8.9%
Indianapolis	1.4%	19.8%
Cincinnati	1.1%	-4.0%
Pittsburgh	-3.2%	-7.5%
Baltimore	-3.7%	-6.6%
Houston	-1.5%	-1.8%
Columbus	-0.7%	-2.9%
Fort Myers	2.7%	5.8%
Cleveland	-6.7%	-4.2%
Denver	-0.3%	-1.7%
Charlotte	-0.3%	-1.5%
Los Angeles	-0.2%	9.2%

Green: +2% or more | Red: -2% or more

Sources: Key Data – Amadeus.
Note: Data is a direct sample, not the complete estimate.

2025 YTD: International Feeder Markets (Hotel)

Country	Checkin Change from 2024	2025 Avg. Length of Stay	Length of Stay Change from 2024	Revenue Change from 2024
Canada	-40.65%	2.9	8.04%	-35.55%
Great Britain	-18.36%	2.9	6.63%	-2.97%
Germany	-22.10%	3.2	8.50%	-33.89%
Mexico	-6.96%	3.6	21.21%	29.73%
Switzerland	-28.47%	2.5	2.04%	-29.44%

2025 YTD: International Feeder Markets (Vacation Rentals)

Country	Checkin Change from 2024	2025 Avg. Length of Stay	Length of Stay Change from 2024	Revenue Change from 2024
Canada	-37.63%	12.5	6.46%	-6.22%
Great Britain	-0.33%	10.9	12.55%	2.60%
Germany	17.75%	10.2	7.29%	27.99%
Switzerland	-16.28%	9.6	-3.36%	-21.54%
Mexico	72.22%	11.3	156.17%	55.45%

Sources: Key Data – Amadeus.
Note: Data is a direct sample, not the complete estimate.

Green: +2% or more | Red: -2% or more

Top 25 Hotel Feeder Markets: June 2025

Top 25 Markets
June 2025

Total Check ins:
+1.7%

Average Length of Stay:
-0.9%

Market Area	Checkin Change from 2024	Length of Stay % Change	Revenue Change from 2024
Tampa-St. Petersburg-Clearwater	6.93%	5.9%	1.37%
Orlando	1.24%	0.0%	0.23%
Miami	5.76%	-5.0%	-6.86%
Atlanta	2.19%	-8.3%	-8.53%
Jacksonville	-5.85%	0.0%	-10.08%
New York	-10.01%	-4.0%	-16.60%
Bradenton-Sarasota	17.78%	6.7%	10.66%
Lakeland-Winter Haven	-5.33%	-5.6%	-15.88%
Chicago	-11.45%	3.8%	-11.92%
Washington DC	-7.18%	-3.8%	-19.46%
Fort Myers	11.14%	-5.6%	-3.18%
Dallas-Fort Worth	-1.72%	-4.0%	-6.53%
Palm Bay-Melbourne	6.91%	0.0%	-1.42%
Deltona-Daytona Beach	0.40%	-5.6%	7.95%
Philadelphia	9.40%	0.0%	-0.21%
Houston	-4.85%	0.0%	-10.32%
Cincinnati	12.53%	0.0%	-0.99%
Tallahassee	-6.35%	-5.0%	-17.66%
Boston	11.49%	-4.0%	7.20%
Charlotte	6.78%	4.3%	13.61%
Nashville	-13.39%	-4.0%	-11.60%
Detroit	25.38%	0.0%	15.16%
St. Louis	-15.43%	3.8%	-10.31%
Denver	-4.39%	4.2%	2.61%
Baltimore	-10.79%	3.8%	-13.24%

Sources: Key Data – Amadeus.
Note: Data is a direct sample, not the complete estimate.

Hotel Performance Summary

Monthly & Fiscal

Hotel Performance Summary

Pinellas County, FL | June 2025

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
June	69.2%	$182.29	$126.08	660.1K	456.6K	$83.2M
Change vs. Previous Year	▼ -2.7%	▲ 0.0%	▼ -2.7%	▼ -2.6%	▼ -5.2%	▼ -5.2%
YTD Fiscal Year	76.5%	$202.50	$154.81	5.9M	4.5M	$910.2M
YTD Change vs. Previous Year	▲ 10.7%	▲ 2.2%	▲ 13.1%	▼ -4.4%	▲ 5.9%	▲ 8.2%

Vacation Rental Performance Summary

Monthly & Fiscal

Short Term Rental Performance Summary

Pinellas | June 2025

	Adj. Paid Occ.	ADR	Adj. RevPAR	Supply	Demand	Revenue
June	60.1%	$271.93	$163.52	62.2K	37.4K	$10.2M
Change vs. Previous Year	▲ 0.3%	▲ 4.3%	▲ 4.7%	▼ -13.2%	▼ -12.9%	▼ -9.1%
YTD Fiscal Year	56.7%	$256.89	$145.59	530.0K	300.4K	$77.2M
YTD Change vs. Previous Year	▼ -5.2%	▲ 2.7%	▼ -2.6%	▼ -15.1%	▼ -19.5%	▼ -17.4%

Source: CoStar, : Key Data. Direct Vacation Rental data sample of 136 Property Managers and 2853 units

Hotel Supply Year to Year Change (FY25 v FY24)										
Region	Area	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN
State Average	State of Florida	0.9%	0.7%	0.5%	0.5%	0.9%	0.9%	1.1%	1.4%	1.3%
Southwest Gulf	Pinellas County, FL	-6.7%	-5.8%	-5.1%	-5.8%	-4.0%	-3.5%	-3.0%	-3.0%	-2.6%
	Hillsborough County, FL	0.2%	-2.3%	-1.9%	-1.9%	-0.1%	0.8%	0.8%	1.1%	1.5%
	Sarasota/Bradenton, FL	0.4%	-1.3%	-1.3%	0.9%	2.0%	3.3%	3.3%	3.4%	2.2%
	Fort Myers, FL	7.0%	5.6%	4.4%	6.6%	9.6%	10.3%	10.3%	9.6%	10.6%
	Naples, FL	9.5%	9.5%	4.0%	4.0%	4.0%	0.0%	0.0%	0.0%	0.0%
Central	Orlando	0.7%	0.5%	0.5%	0.1%	0.2%	0.8%	1.0%	1.3%	1.1%
	Osceola County, FL	-0.1%	-0.5%	-0.4%	-1.2%	-1.2%	-1.0%	-0.8%	0.8%	1.2%
Southeast	Palm Beach County, FL	-0.3%	0.2%	1.0%	1.4%	1.3%	1.3%	1.3%	2.4%	2.1%
	Fort Lauderdale, FL	0.6%	-0.2%	-0.4%	0.4%	0.8%	0.8%	0.6%	1.0%	0.9%
	Miami/Hialeah, FL	-0.1%	0.0%	-0.3%	-0.2%	-0.2%	-0.1%	0.5%	0.6%	-0.3%
	Florida Keys	-0.6%	1.4%	1.4%	1.6%	1.6%	1.6%	2.0%	2.9%	2.1%

Sources: CoStar

Green: +2% or more | Red: -2% or more

Hotel Demand Year to Year Change (FY25 v FY24)

Region	Area	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN
State Average	State of Florida	6.5%	8.7%	7.2%	4.4%	3.3%	-0.2%	2.3%	0.3%	0.8%
Southwest Gulf	Pinellas County, FL	7.8%	20.7%	23.8%	16.6%	7.7%	-3.2%	-2.1%	-4.8%	-5.2%
	Hillsborough County, FL	14.9%	19.0%	12.0%	8.5%	5.8%	0.8%	0.0%	-0.7%	-3.9%
	Sarasota/Bradenton, FL	24.7%	15.6%	12.3%	8.4%	3.9%	0.9%	0.4%	-0.4%	4.6%
	Fort Myers, FL	6.7%	6.4%	6.7%	1.4%	8.4%	5.7%	6.5%	5.7%	7.9%
	Naples, FL	0.4%	15.4%	15.7%	5.5%	2.9%	4.5%	6.9%	5.1%	1.0%
Central	Orlando	3.0%	5.2%	4.5%	3.4%	1.8%	-3.9%	3.1%	1.9%	2.6%
	Osceola County, FL	3.8%	5.2%	4.6%	2.6%	0.6%	-6.5%	4.0%	3.5%	2.1%
Southeast	Palm Beach County, FL	5.1%	12.2%	9.7%	10.8%	6.7%	4.3%	5.2%	6.7%	5.4%
	Fort Lauderdale, FL	1.0%	1.9%	-2.1%	-1.2%	-0.4%	-3.5%	0.6%	-0.9%	0.5%
	Miami/Hialeah, FL	0.8%	2.3%	0.7%	0.4%	1.9%	-0.5%	2.8%	-2.0%	1.1%
	Florida Keys	-13.7%	0.6%	0.3%	0.0%	1.9%	2.6%	4.1%	4.2%	9.1%

Sources: CoStar

Green: +2% or more | Red: -2% or more

Industry Insights

- "Second-quarter earnings reports revealed that U.S. hotels are seeing limited growth while the gap between luxury and budget hotels is growing."

  – Skift, Sean O'Neill, Hospitality Editor

- "Alternative accommodations such as cruises and short-term rental properties continue to attract travelers looking for flexible options."

  – Brick Hospitality, Robert Rauch, Skift contributor

- "Travelers remain eager but budget-conscious. Many are choosing shorter trips, regional travel or RV vacations to save money."

  – University of Florida, Rachel J.C. Fu, Department of Tourism

- "TSA passenger screenings across the U.S. were up during the week when hotel demand was down, which indicates more travelers are choosing other forms of accommodations. Summer is the peak season for alternative accommodations such as short-term rentals, cruises and camping."

  – CoStar, Isaac Collazo, Director of Marketing Insights

Possible Causes For Headwinds

- New supply from Fort Myers, Sarasota has increased regional hotel competition
- Epic Universe opened in May as a new central Florida experience drawing demand
- New flight routes increased access to Key West in June
- Cruise bookings are expected to break records in 2025
- Consumers are becoming increasingly budget-conscious

Immediate Response

- Leverage National Beach Day with Allegiant Airlines promotion, Trip Advisor takeover and FC Cincy activation.
- Increase regional marketing in Orlando (and Florida) to boost short-window bookings.
- Focus on value – Launching new campaigns with Hopper and Travelzoo and highlight FunShine Savings

360 DAYS OF SUN & CLEARWATER BEACH & MUSEUMS & MELTING CLOCKS & ST. PETE BEACH & PRISMATIC MURALS & DALÍ'S MUSTACHE & MADEIRA BEACH & ART GALLERIES & EMERALD-GREEN WATER & CUTE MANATEES & DOLPHINS PLAYING & TREASURE ISLAND & THE CHIHULY COLLECTION & HONEYMOON ISLAND & THE JAMES MUSEUM & BREEZY BIKE PATHS & SUGAR-WHITE SAND & LUSH GREEN GOLF COURSES & FORT DE SOTO PARK & MANGROVE & TUNNELS & WATERFRONT CONCERTS & HIDDEN BEACHES & PARTY BEACHES & BLOWN GLASS CLASSES & FINE ARTS & CRAFT BREWS & ROOF TOP COCKTAILS & SUNSETS & SUNRISES & PRIDE FEST & PADDLEBOARDS & SAILBOATS & GROUPER SANDWICHES & 200 MPH INDY CARS & TIKI BARS & SEASHELLS & SANDCASTLES & SWIMSUITS & SUNGLASSES & FLIP-FLOPS & BEACH NAPS & CANNONBALLS IN THE POOL & SNORKELING & PALM TREES & VISIT ST. PETE-CLEARWATER & 360 DAYS OF SUN & CLEARWATER BEACH & MUSEUMS & MELTING CLOCKS & ST. PETE BEACH & PRISMATIC MURALS & DALÍ'S MUSTACHE & MADEIRA BEACH & ART GALLERIES & EMERALD-GREEN WATER & CUTE MANATEES & DOLPHINS PLAYING & TREASURE ISLAND & THE CHIHULY COLLECTION & HONEYMOON ISLAND & THE JAMES MUSEUM & BREEZY BIKE PATHS & SUGAR-WHITE SAND & LUSH OURSES & FORT DE SOTO PARK & MANGROVE & TUNNELS & WATE RONT CONCERTS & HIDDEN BEACHES & PARTY BEACHES & BLOWN GLASS CLASSES & FINE ARTS & CRAFT BREWS & ROOF TOP COCKTAILS & SUNSETS & SUNRISES & PRIDE FEST & PADDLEBOARDS & SAILBOATS

ST.PETE
CLEARWATER,FL