

DESTINATION METRICS

August 2025

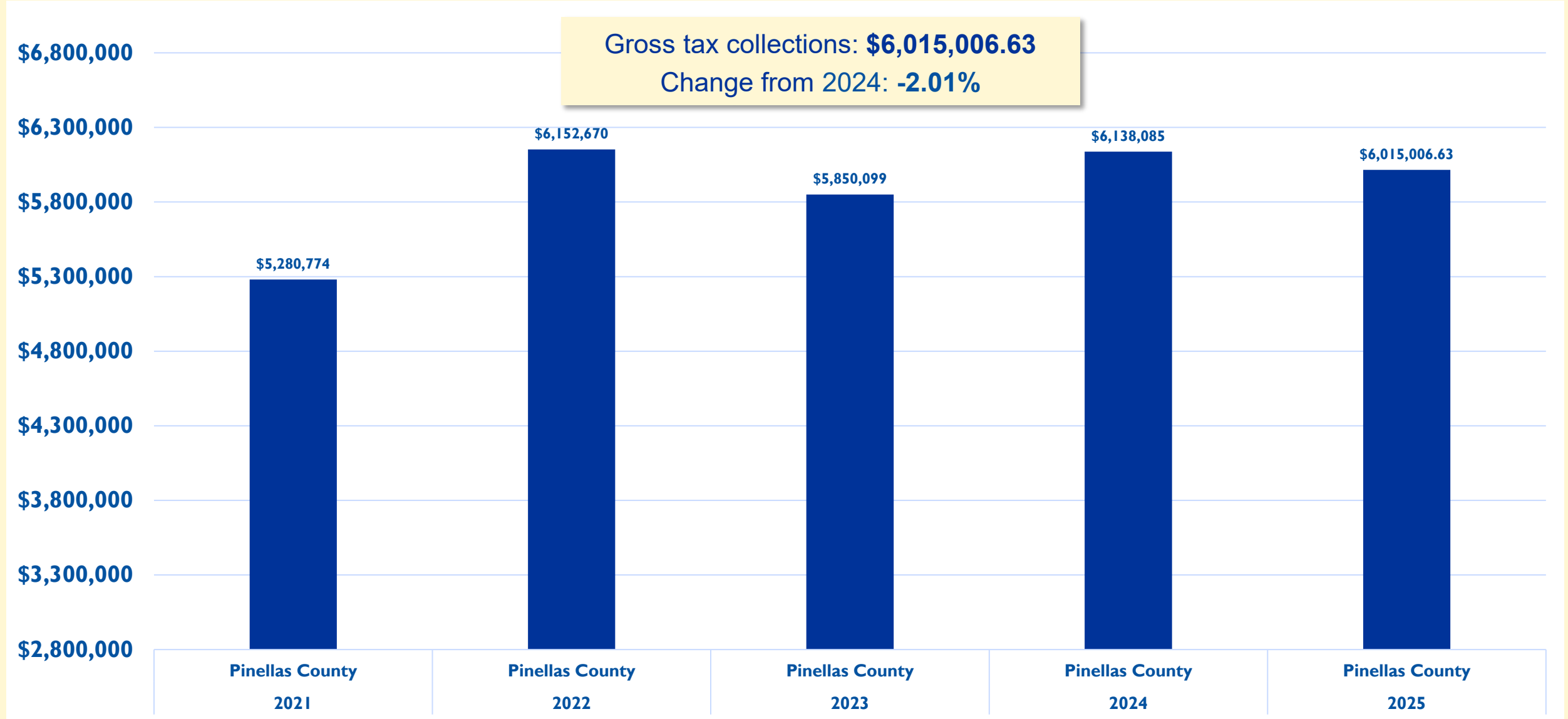


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Topline Data



August Tourist Development Tax

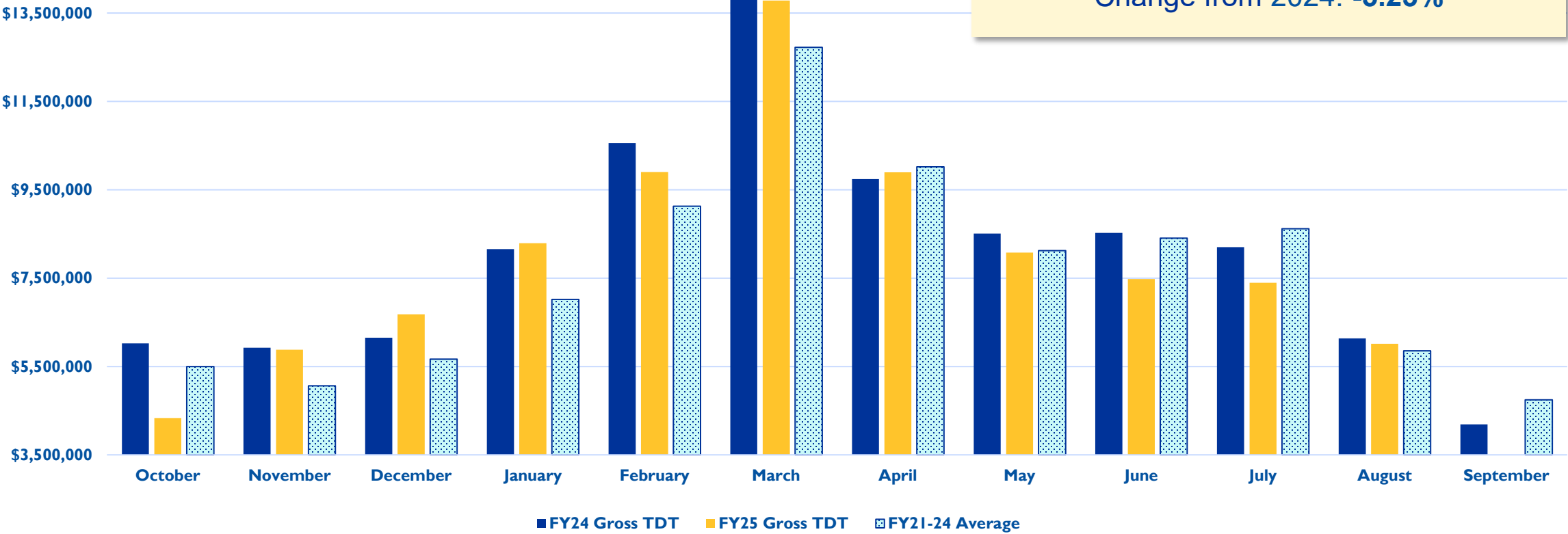


TDT Local Option – August

Local Option Tax	Aug 2024 Tax Collected	Aug 2025 Tax Collected	2025 Difference from 2024	Percent Change
Clearwater/Clearwater Beach	\$1,678,007.61	\$1,885,906.17	\$207,898.56	12.39%
St. Pete	\$644,943.74	\$701,824.73	\$56,880.99	8.82%
Dunedin	\$62,263.55	\$79,154.27	\$16,890.72	27.13%
Tarpon Springs/Oldsmar/Palm Harbor/Safety Harbor	\$160,932.33	\$148,975.17	-\$11,957.16	-7.43%
Indian Rocks/Indian Shores/Madeira/Belleair	\$178,510.62	\$148,930.65	-\$29,579.97	-16.57%
Treasure Island	\$239,160.56	\$191,301.05	-\$47,859.51	-20.01%
St. Pete Beach	\$759,222.45	\$651,451.85	-\$107,770.60	-14.19%
Vacation Rental/MISC	\$2,293,550.25	\$1,991,038.23	-\$302,512.02	-13.19%

Tourist Development Tax Snapshot

TDT FY Collections to date: \$87,724,063
Change from 2024: -5.23%



Hospitality Performance Snapshot

Hotel August Summary

Monthly & Fiscal

Hotel Performance Summary

Pinellas County, FL | August 2025

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
	61.3%	\$164.70	\$100.95	676.1K	414.4K	\$68.3M
Change vs. Previous Year	▲ 0.7%	▲ 3.9%	▲ 4.6%	▼ -4.3%	▼ -3.6%	▲ 0.1%
YTD Fiscal Year	74.1%	\$197.90	\$146.69	7.2M	5.3M	\$1.1B
YTD Change vs. Previous Year	▲ 8.4%	▲ 2.3%	▲ 10.9%	▼ -4.5%	▲ 3.5%	▲ 5.8%

Vacation Rental August Summary

Monthly & Fiscal

Short Term Rental Performance Summary

Pinellas | August 2025

	Adj. Paid Occ.	ADR	Adj. RevPAR	Supply	Demand	Revenue
	44.4%	\$216.88	\$96.37	66.0K	29.3K	\$6.4M
Change vs. Previous Year	▲ 8.9%	▲ 3.8%	▲ 13.1%	▼ -12.0%	▼ -4.1%	▼ -0.5%
YTD Fiscal Year	56.5%	\$252.64	\$142.65	659.8K	372.5K	\$94.1M
YTD Change vs. Previous Year	▼ -2.7%	▲ 1.6%	▼ -1.1%	▼ -14.3%	▼ -16.6%	▼ -15.3%

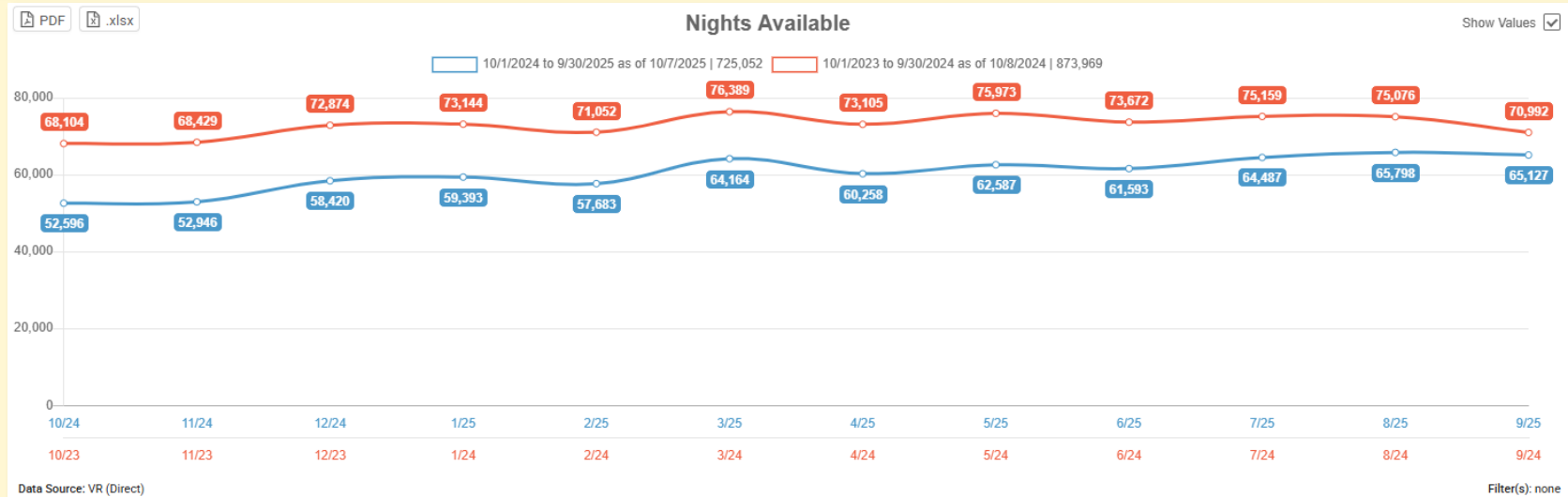
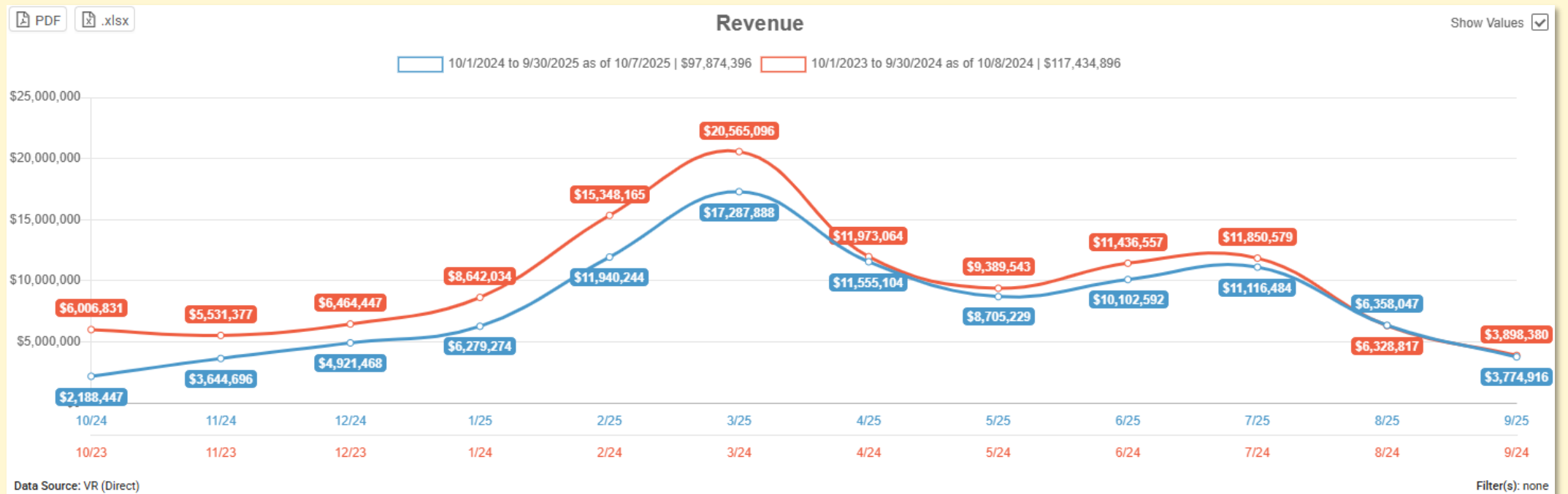
Source: CoStar, Key Data. Direct Vacation Rental data sample of 143 Property Managers and 2824 units

Exploring Vacation Rental Progress



Vacation Rental Update:

FY25 Revenue (of sample) comparison



Source: Key Data. Direct Vacation Rental data sample of 143 Property Managers and 2824 units

Vacation Rental Update:

FY25 ADR, Demand Progression

Date	FY25 ADR	Change in Sample ADR vs FY24	Change in Sample Demand vs FY24
October	\$159.74	-13.6%	-57.8%
November	\$174.65	-6.0%	-29.9%
December	\$217.57	1.6%	-25.0%
January	\$200.87	-6.5%	-22.3%
February	\$272.40	-3.8%	-19.1%
March	\$328.72	-1.4%	-14.8%
April	\$272.45	4.8%	-7.9%
May	\$234.77	6.3%	-12.8%
June	\$267.58	3.7%	-14.8%
July	\$271.10	4.9%	-10.6%
August	\$216.86	5.3%	-4.6%
September	\$184.65	6.2%	-8.8%

- ADR has had six months of positive year over year change.
- Demand remains below last year but has moved to a single digit gap in August and September.

Hotel Trends & Forecast



Skift U.S.Travel Index Health Summary

Skift Travel Health Index	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25
US Average Travel Index	104.3	102.4	105.0	106.3	102.6	102.6	100.3	101.4	101	99.4	96.6
US Aviation	104.1	102.6	104.9	104.6	100.8	101.7	100.3	102	102.1	98.2	95.9
US Hotel	97.3	90.3	96.3	103.4	99.6	101.8	96.2	97.5	94.5	96.3	94.8
US Vacation Rental	103.1	103.7	101.9	103.7	106	102.8	105.8	105.9	102.9	104.4	106.3
US Car Rental	136.7	138.0	136.1	138.2	130.9	124.4	117	121.7	127.3	118.1	107

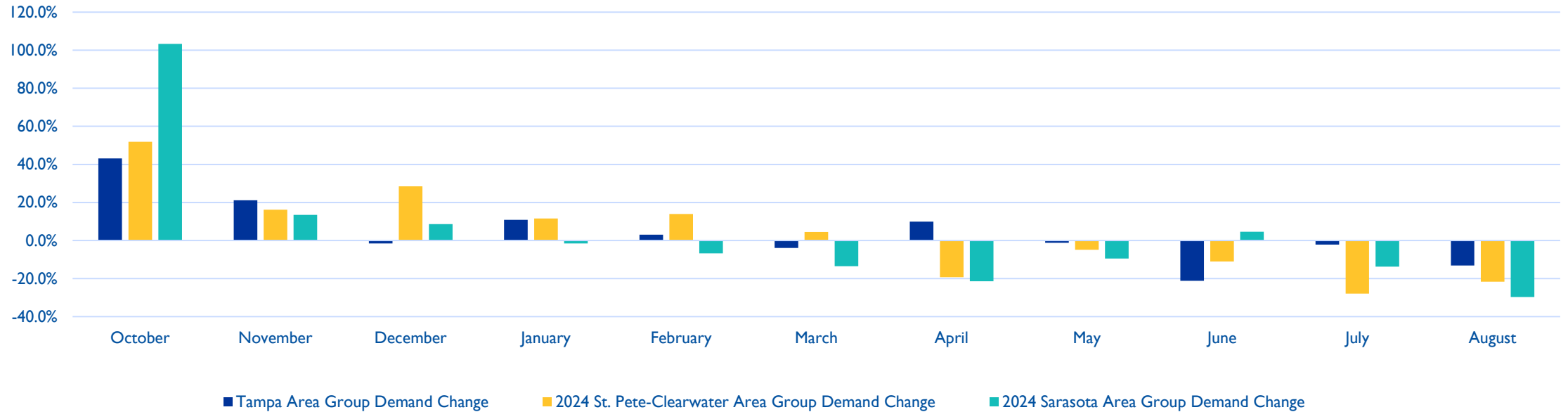
Measuring travel industry health across four main sectors: aviation, hotels, vacation rentals, and car rentals.

100 = same as previous year

- Vacation rental and car rental industries continue to outperform relative to last year.
- Hotel and aviation industries are more frequently at or below last year.

FY25 Group Hotel Performance Picture Tampa Bay Area

FY25 Year over Year Change, Group Demand



St. Pete-Clearwater-Tarpon Springs	Oct 22 - Aug 23	Oct 23 - Aug 24	Oct 24 - Aug 25
Total Group Hotel Demand	1,209,107	1,127,304	1,200,851
Total CoStar Hotel Demand	5,728,439	5,534,231	5,779,863
Percent of Total Demand	21.1%	20.4%	20.8%

CoStar group segment of the hospitality industry is defined as blocks of 10 or more rooms booked per night

Hotel Performance Forecast FY25-26

CoStar Hotel Market Demand Forecast

St. Pete-Clearwater CoStar Market Region	Revenue	Demand	Supply	Revenue vs 24	Demand vs 24	Supply vs 24	Revenue vs 23	Demand vs 23	Supply vs 23
September	\$59,723,729	430,136	741,690	1.9%	2.2%	0.6%	-4.09%	2.93%	1.64%
October	\$73,479,176	482,754	766,413	-4.9%	-3.2%	9.2%	2.53%	6.24%	2.11%
November	\$72,092,462	469,284	741,690	-21.3%	-13.7%	8.3%	3.46%	6.65%	2.20%
December	\$74,790,292	473,883	766,413	-22.9%	-14.8%	7.9%	6.83%	7.24%	2.52%

- Hotel forecast for Q1 of FY26 is below last year, but higher than 2023.



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