



ST.PETE
CLEARWATER
FLORIDA

Economic Snapshot Report

October 2025 TDC Meeting - August 2025 Data

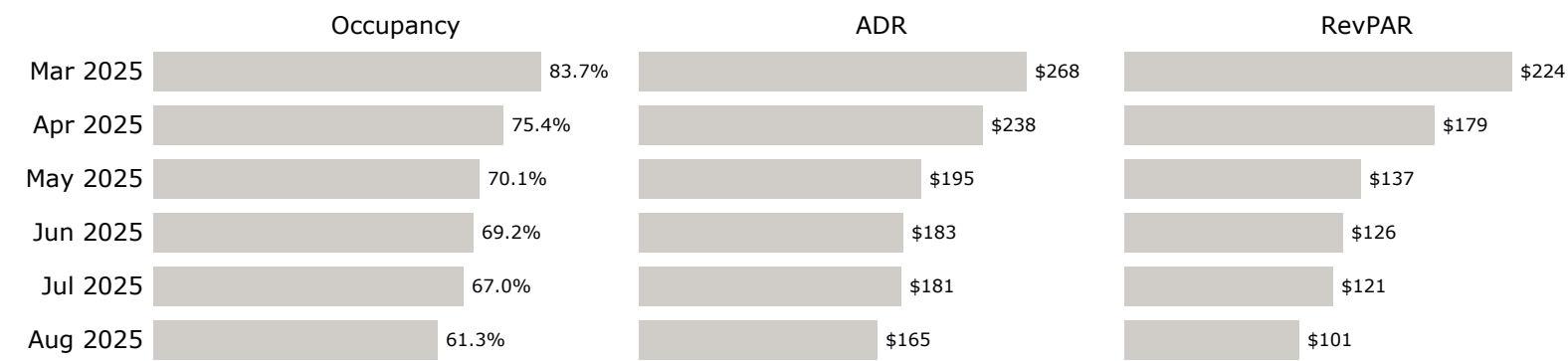
Hotel Performance Summary

Pinellas County, FL | August 2025



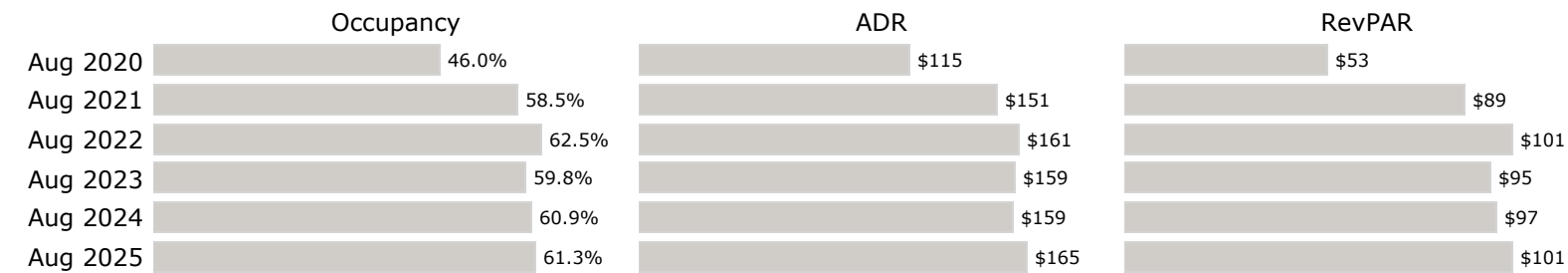
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
	61.3%	\$164.70	\$100.95	676.1K	414.4K	\$68.3M
Change vs. Previous Year	▲ 0.7%	▲ 3.9%	▲ 4.6%	▼ -4.3%	▼ -3.6%	▲ 0.1%
YTD Fiscal Year	74.1%	\$197.90	\$146.69	7.2M	5.3M	\$1.1B
YTD Change vs. Previous Year	▲ 8.4%	▲ 2.3%	▲ 10.9%	▼ -4.5%	▲ 3.5%	▲ 5.8%

Last Six Months Performance

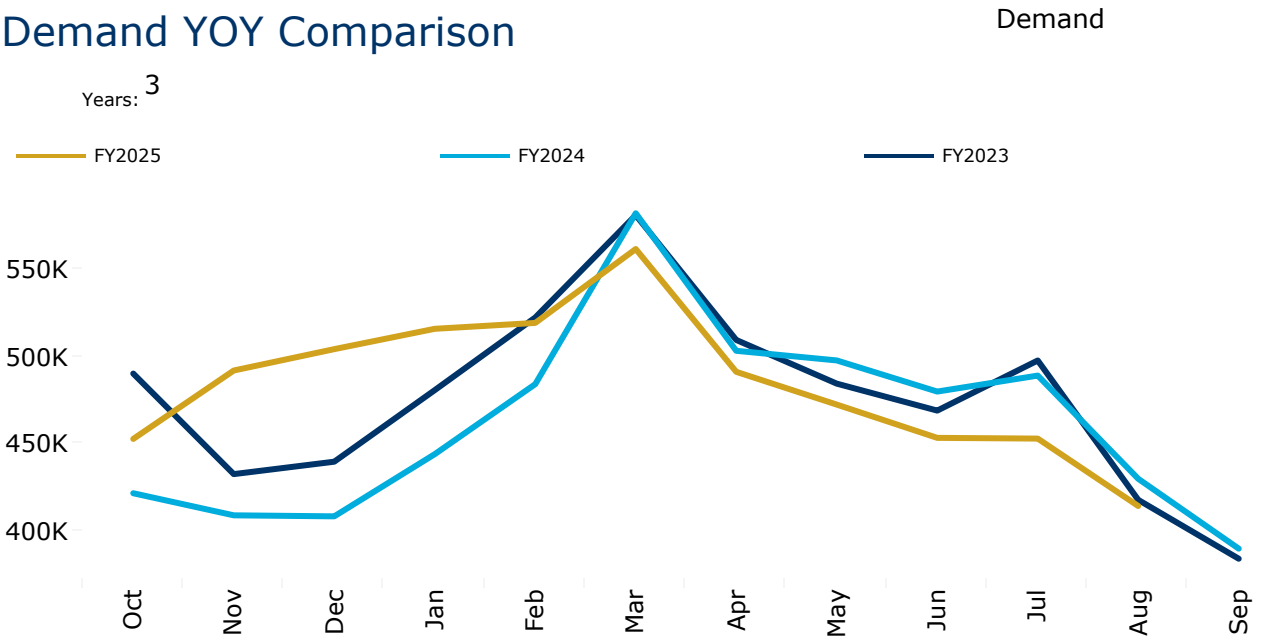


August Performance by Year

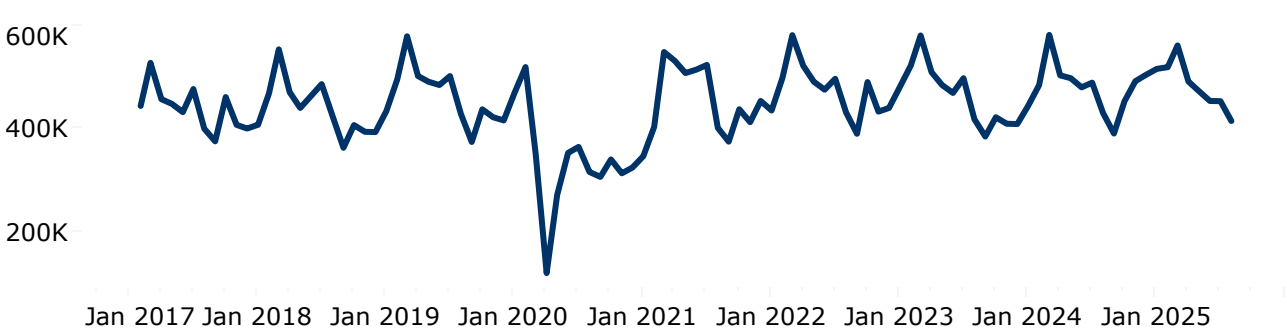
Pinellas County, FL



Demand YOY Comparison



Demand Long Term Trend

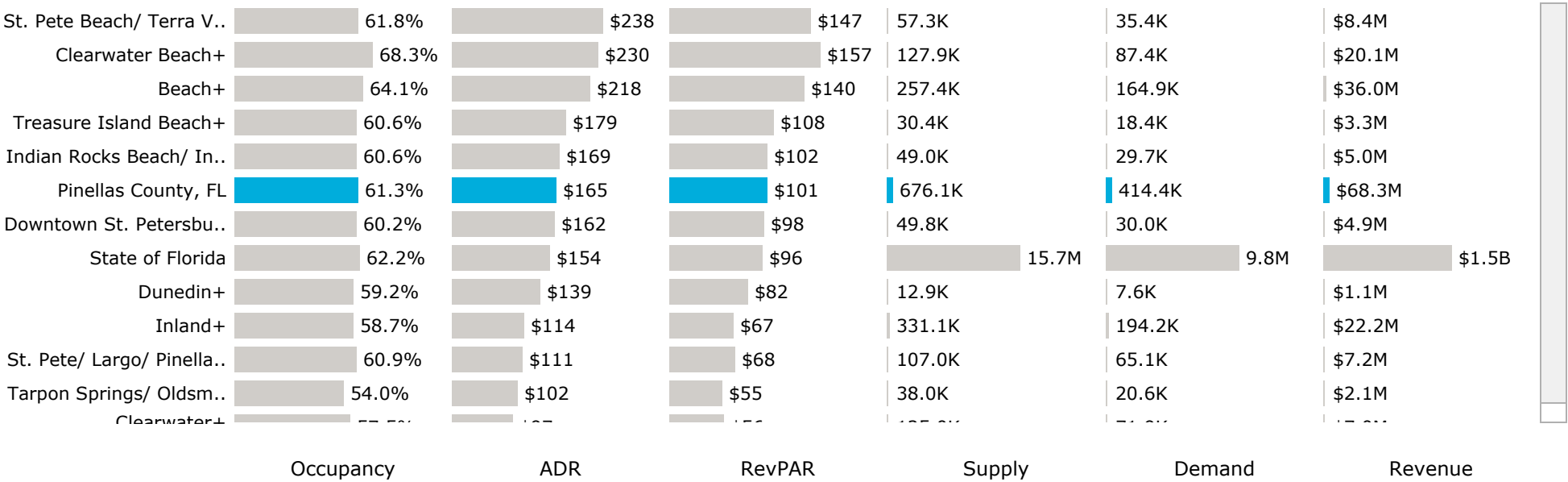


Submarkets Hotel Performance

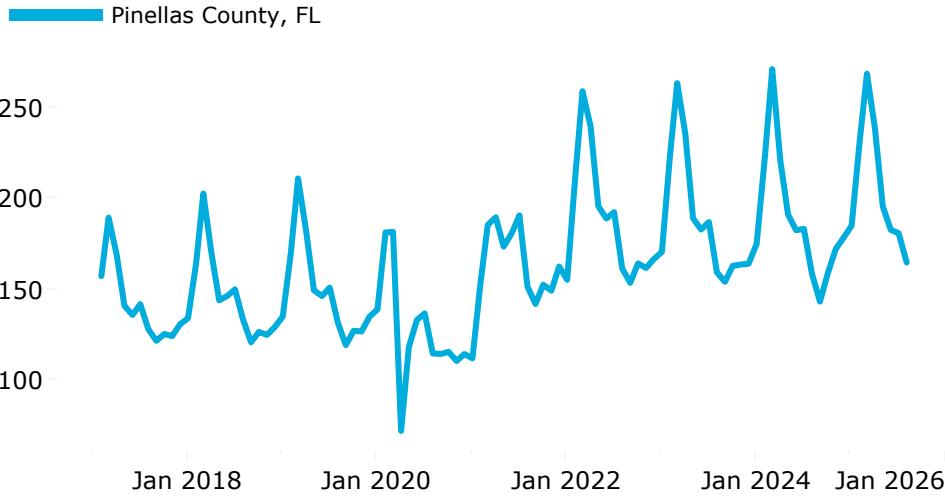
Pinellas County, FL vs. Submarkets



August 2025, Submarket Hotel KPIs

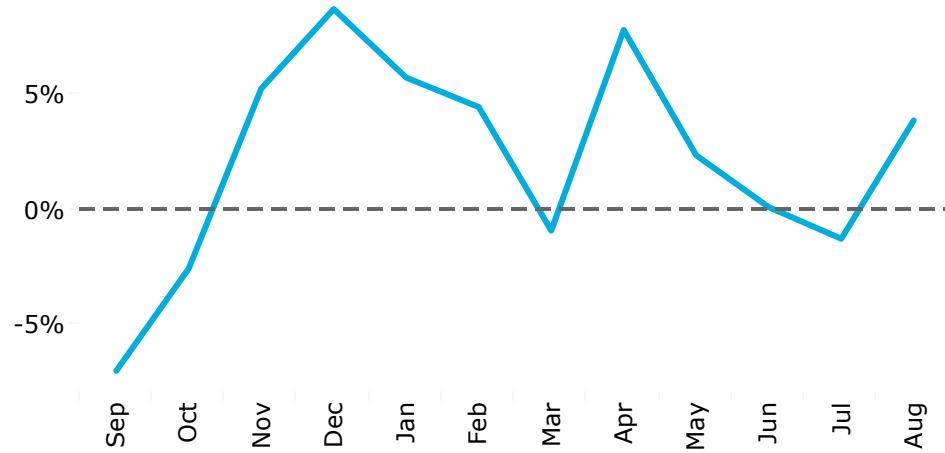


ADR Comparison



ADR vs. Same Month in Previous Year

Last 12 Months



August 2025, Submarket Hotel Performance vs. Previous Year

	Occ	YOY	ADR	YOY	RevPAR	YOY	Total Supply	YOY	Rooms Sold	YOY	Room Revenue	YOY
Clearwater Beach+	68.3%	▲ 1.6%	\$230	▲ 0.5%	\$157	▲ 2.0%	127.9K	▼ -2.3%	87.4K	▼ -0.8%	\$20.1M	▼ -0.3%
Clearwater+	57.5%	▼ -4.4%	\$97	▲ 6.1%	\$56	▲ 1.4%	125.0K	▼ -4.5%	71.9K	▼ -8.7%	\$7.0M	▼ -3.1%
Downtown St. Petersburg+	60.2%	▲ 3.8%	\$162	▼ -5.4%	\$98	▼ -1.8%	49.8K	▼ -0.2%	30.0K	▲ 3.6%	\$4.9M	▼ -1.9%
Dunedin+	59.2%	▲ 11.0%	\$139	▼ -6.9%	\$82	▲ 3.3%	12.9K	▲ 0.0%	7.6K	▲ 11.0%	\$1.1M	▲ 3.3%
Indian Rocks Beach/ Indian Shores/ Madeir..	60.6%	▼ -2.6%	\$169	▲ 13.4%	\$102	▲ 10.4%	49.0K	▼ -4.2%	29.7K	▼ -6.8%	\$5.0M	▲ 5.7%
Pinellas County, FL	61.3%	▲ 0.7%	\$165	▲ 3.9%	\$101	▲ 4.6%	676.1K	▼ -4.3%	414.4K	▼ -3.6%	\$68.3M	▲ 0.1%
St. Pete Beach/ Terra Verde+	61.8%	▲ 8.5%	\$238	▲ 7.8%	\$147	▲ 17.0%	57.3K	▼ -31.9%	35.4K	▼ -26.1%	\$8.4M	▼ -20.3%
St. Pete/ Largo/ Pinellas Park+	60.9%	▲ 0.2%	\$111	▲ 3.8%	\$68	▲ 4.0%	107.0K	▼ -0.6%	65.1K	▼ -0.4%	\$7.2M	▲ 3.4%
Tarpon Springs/ Oldsmar/ Palm Harbor..	54.0%	▼ -2.8%	\$102	▼ -7.9%	\$55	▼ -10.4%	38.0K	▼ -0.5%	20.6K	▼ -3.3%	\$2.1M	▼ -10.9%
Treasure Island Beach+	60.6%	▼ -4.5%	\$179	▲ 3.3%	\$108	▼ -1.4%	30.4K	▼ -14.9%	18.4K	▼ -18.7%	\$3.3M	▼ -16.1%

History for submarkets varies. Click on a submarket to check its history in the line charts

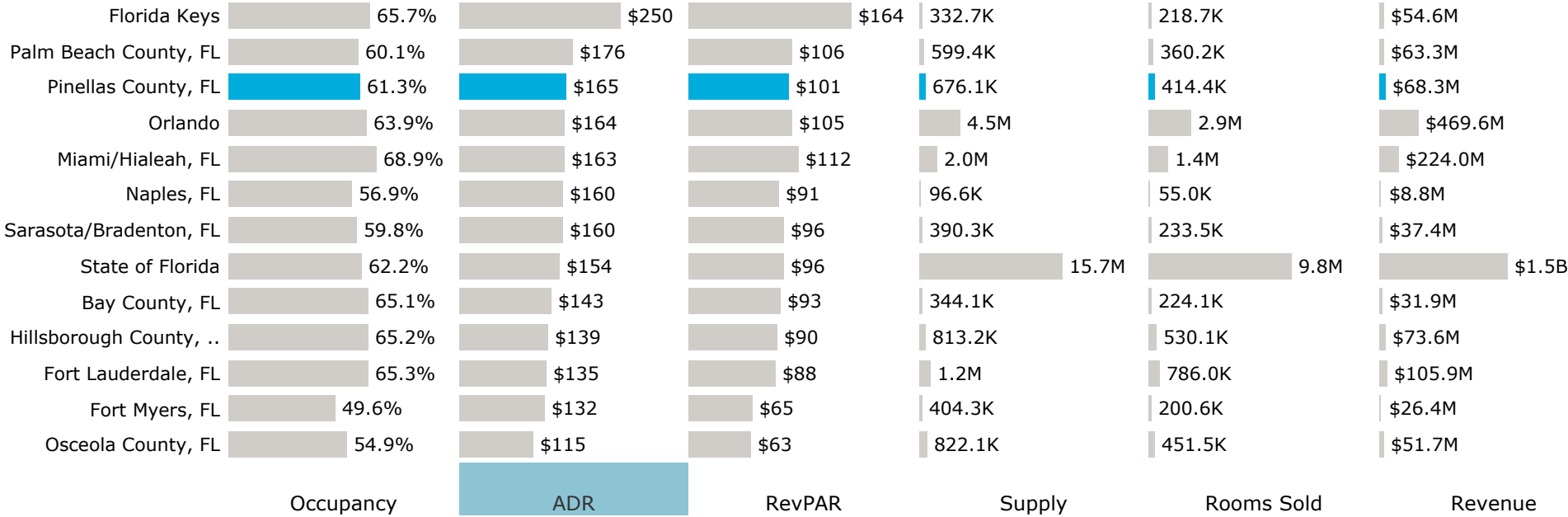
Source: STR

Competitive Markets Hotel Performance

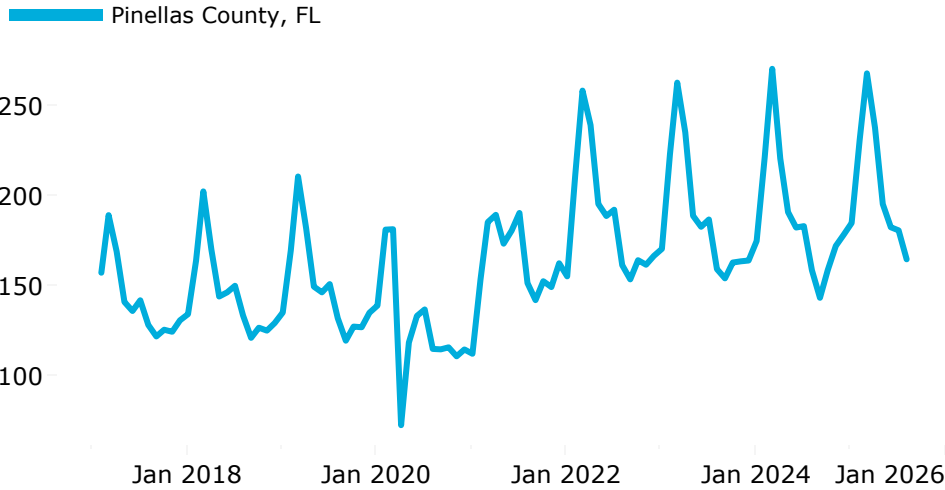
Pinellas County, FL vs. Comp. Markets



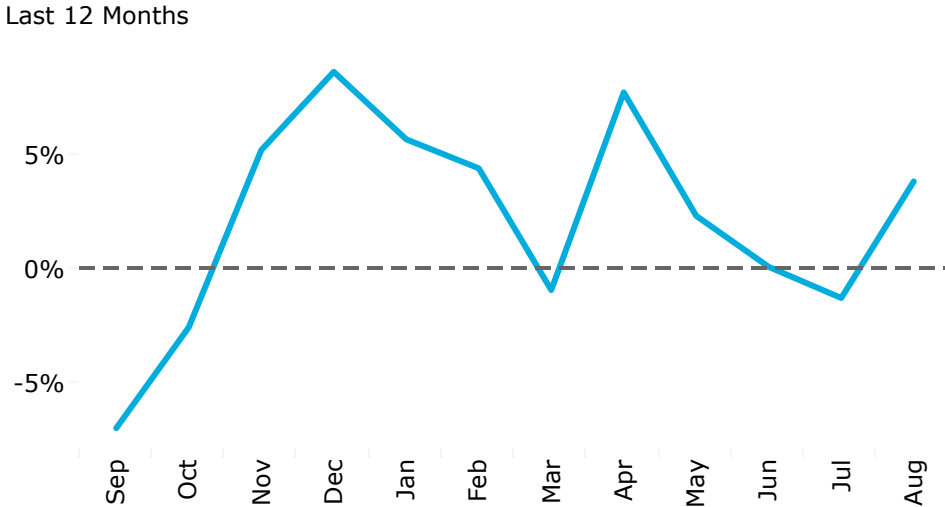
August 2025, Comp. Markets Hotel KPIs



ADR Comparison



ADR vs. Same Month in Previous Year



August 2025, Comp. Markets Hotel Performance vs. Previous Year

	Occ	YOY	ADR	YOY	RevPAR	YOY	Total Supply	YOY	Demand	YOY	Revenue	YOY
Bay County, FL	65.1%	▼ -0.9%	\$143	▲ 3.0%	\$93	▲ 2.0%	344.1K	▼ -1.2%	224.1K	▼ -2.2%	\$31.9M	▲ 0.8%
Florida Keys	65.7%	▲ 1.1%	\$250	▼ -1.8%	\$164	▼ -0.7%	332.7K	▲ 2.2%	218.7K	▲ 3.4%	\$54.6M	▲ 1.5%
Fort Lauderdale, FL	65.3%	▲ 1.7%	\$135	▲ 1.3%	\$88	▲ 3.0%	1.2M	▼ -0.6%	786.0K	▲ 1.1%	\$105.9M	▲ 2.4%
Fort Myers, FL	49.6%	▼ -2.4%	\$132	▲ 6.9%	\$65	▲ 4.3%	404.3K	▲ 11.1%	200.6K	▲ 8.5%	\$26.4M	▲ 15.9%
Hillsborough County..	65.2%	▲ 0.4%	\$139	▲ 2.0%	\$90	▲ 2.4%	813.2K	▲ 1.4%	530.1K	▲ 1.8%	\$73.6M	▲ 3.8%
Miami/Hialeah, FL	68.9%	▲ 1.7%	\$163	▲ 2.6%	\$112	▲ 4.4%	2.0M	▼ -1.1%	1.4M	▲ 0.6%	\$224.0M	▲ 3.2%
Naples, FL	56.9%	▲ 8.2%	\$160	▼ -5.3%	\$91	▲ 2.5%	96.6K	▲ 0.0%	55.0K	▲ 8.2%	\$8.8M	▲ 2.5%
Orlando	63.9%	▲ 2.5%	\$164	▲ 2.3%	\$105	▲ 4.9%	4.5M	▲ 1.0%	2.9M	▲ 3.5%	\$469.6M	▲ 5.9%
Osceola County, FL	54.9%	▼ -1.2%	\$115	▲ 1.9%	\$63	▲ 0.7%	822.1K	▼ -1.9%	451.5K	▼ -3.1%	\$51.7M	▼ -1.2%
Palm Beach County,..	60.1%	▼ -0.2%	\$176	▲ 4.1%	\$106	▲ 3.9%	599.4K	▲ 1.4%	360.2K	▲ 1.2%	\$63.3M	▲ 5.3%
Pinellas County, FL	61.3%	▲ 0.7%	\$165	▲ 3.9%	\$101	▲ 4.6%	676.1K	▼ -4.3%	414.4K	▼ -3.6%	\$68.3M	▲ 0.1%
Sarasota/Bradenton..	59.8%	▲ 2.2%	\$160	▲ 11.5%	\$96	▲ 13.9%	390.3K	▼ -1.1%	233.5K	▲ 1.0%	\$37.4M	▲ 12.6%
State of Florida	62.2%	▲ 0.3%	\$154	▲ 2.5%	\$96	▲ 2.9%	15.7M	▲ 0.8%	9.8M	▲ 1.2%	\$1.5B	▲ 3.7%

History for markets varies. Click on a market to check its history in the line charts

Source: STR



Pinellas County Tourist Development Tax Collections

August 2025

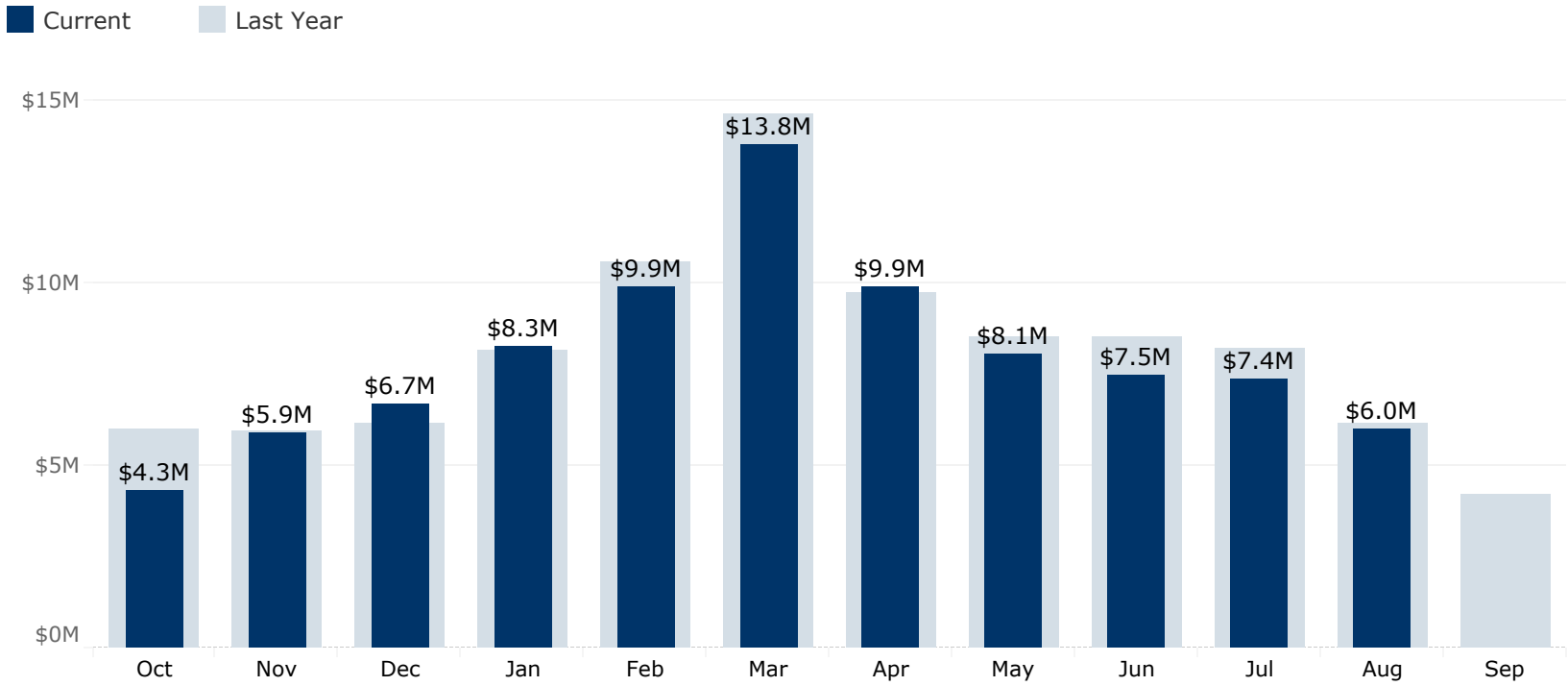


Tourist Development Tax Collections
\$6.0M
-2.0% YOY | +44.6% vs. 2019
Gross Tax Collected

Tourist Development Tax Collections by Month

Fiscal Year 2025

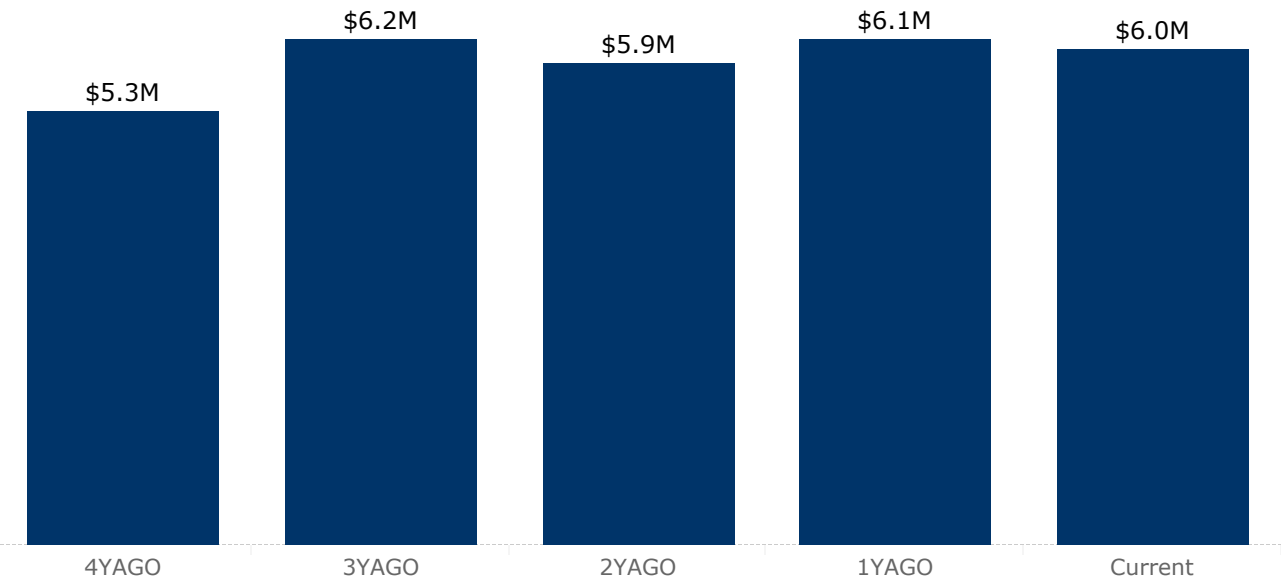
Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
\$4.3M	\$5.9M	\$6.7M	\$8.3M	\$9.9M	\$13.8M	\$9.9M	\$8.1M	\$7.5M	\$7.4M	\$6.0M	
-28.1%	-0.8%	+8.6%	+1.6%	-6.3%	-5.9%	+1.6%	-5.1%	-12.2%	-9.8%	-2.0%	



Source: Pinellas County Tax Collector

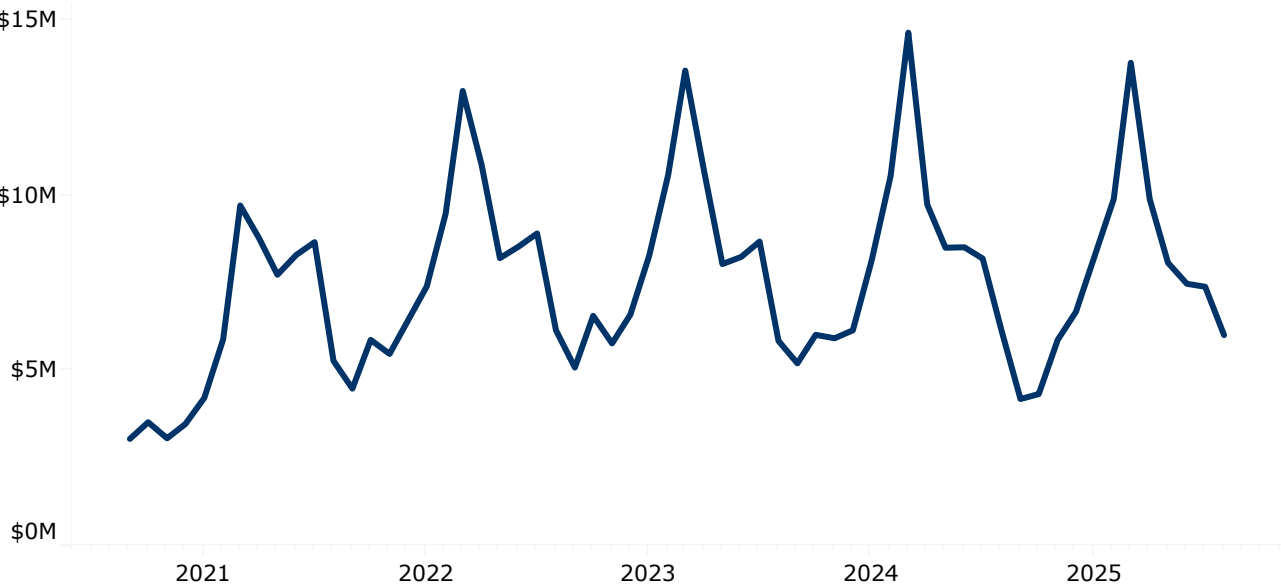
Tourist Development Tax Collections

August 2025 vs. comparable months over the past 5 years



Tourist Development Tax Collections

Long Term Trend





Pinellas County Local Option Tax Collections

August 2025



Local Option Tax Share of Total Collections

	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Miscellaneous/Other	19.43%	28.96%	31.99%	41.30%	35.44%	32.87%	31.64%	33.98%	35.75%	35.82%	33.93%	
Clearwater/Clearwater Beach	35.79%	33.29%	30.53%	24.74%	28.67%	31.71%	32.54%	32.65%	31.04%	32.20%	32.14%	
St Petersburg	25.35%	19.57%	18.29%	16.59%	15.65%	13.48%	13.00%	12.21%	10.71%	9.03%	11.96%	
St Pete Beach/Tierra Verde	4.12%	4.76%	5.27%	4.97%	6.98%	8.80%	11.20%	9.91%	10.76%	11.38%	11.10%	
Treasure Island	2.20%	2.67%	2.99%	2.42%	3.31%	3.44%	3.21%	3.57%	3.80%	3.94%	3.26%	
Oldsmar/Safety Harbor	3.81%	3.15%	2.86%	2.45%	2.06%	1.31%	1.50%	1.20%	0.73%	1.10%	1.43%	
Madeira Beach	1.93%	1.48%	1.95%	1.59%	1.58%	1.70%	1.39%	1.45%	1.63%	1.51%	1.41%	
Dunedin	2.13%	1.51%	1.59%	1.21%	1.42%	1.42%	1.27%	1.23%	1.26%	1.19%	1.35%	
N Redington Beach/Redington Beach/Redington Shores	0.86%	0.86%	0.81%	1.26%	1.12%	1.35%	1.21%	1.17%	1.23%	1.24%	1.18%	
Palm Harbor	2.25%	1.36%	1.31%	1.38%	1.49%	1.04%	1.08%	0.90%	0.65%	0.55%	0.67%	
Indian Rocks Beach	0.24%	0.90%	0.98%	0.92%	1.01%	1.41%	0.89%	0.83%	1.25%	1.00%	0.61%	
Tarpon Springs	1.48%	0.93%	0.73%	0.61%	0.53%	0.59%	0.45%	0.40%	0.42%	0.41%	0.44%	
Indian Shores	0.17%	0.29%	0.45%	0.35%	0.50%	0.65%	0.40%	0.34%	0.60%	0.46%	0.38%	
Belleair/Belleair Beach/Bluffs/Shores	0.24%	0.25%	0.26%	0.21%	0.23%	0.24%	0.22%	0.18%	0.18%	0.19%	0.14%	
Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	

Source: Pinellas County Tax Collector

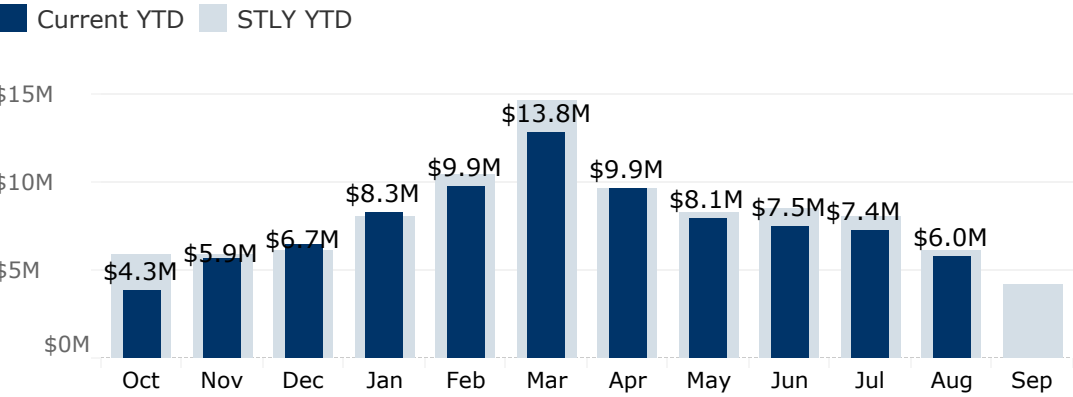
Tourist Development Tax Collections

August 2025 vs. comparable months over the past 5 years



Tourist Development Tax Collections by Month

Fiscal Year 2025



Tourist Development Tax Collections

Long Term Trend

