



ST.PETE
CLEARWATER
FLORIDA

Economic Snapshot Report

September 2025 TDC Meeting - July 2025 Data

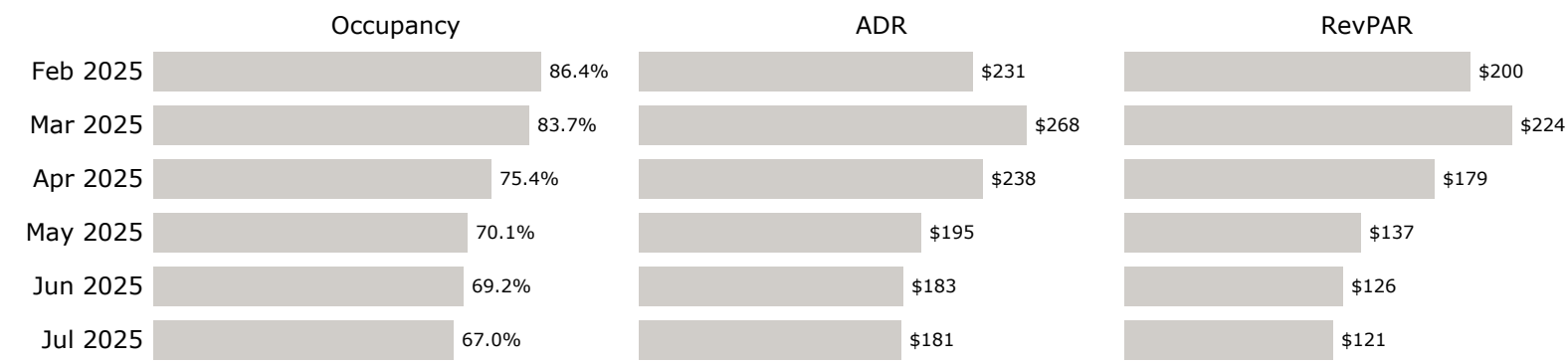
Hotel Performance Summary

Pinellas County, FL | July 2025



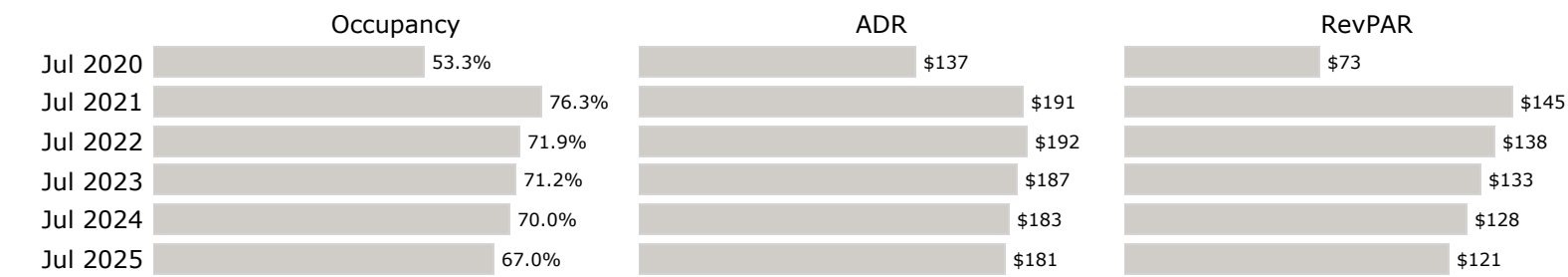
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
	67.0%	\$180.83	\$121.14	676.1K	452.9K	\$81.9M
Change vs. Previous Year	▼ -4.3%	▼ -1.3%	▼ -5.5%	▼ -3.2%	▼ -7.4%	▼ -8.6%
YTD Fiscal Year	75.5%	\$200.70	\$151.44	6.5M	4.9M	\$986.3M
YTD Change vs. Previous Year	▲ 9.1%	▲ 2.0%	▲ 11.3%	▼ -4.6%	▲ 4.1%	▲ 6.3%

Last Six Months Performance

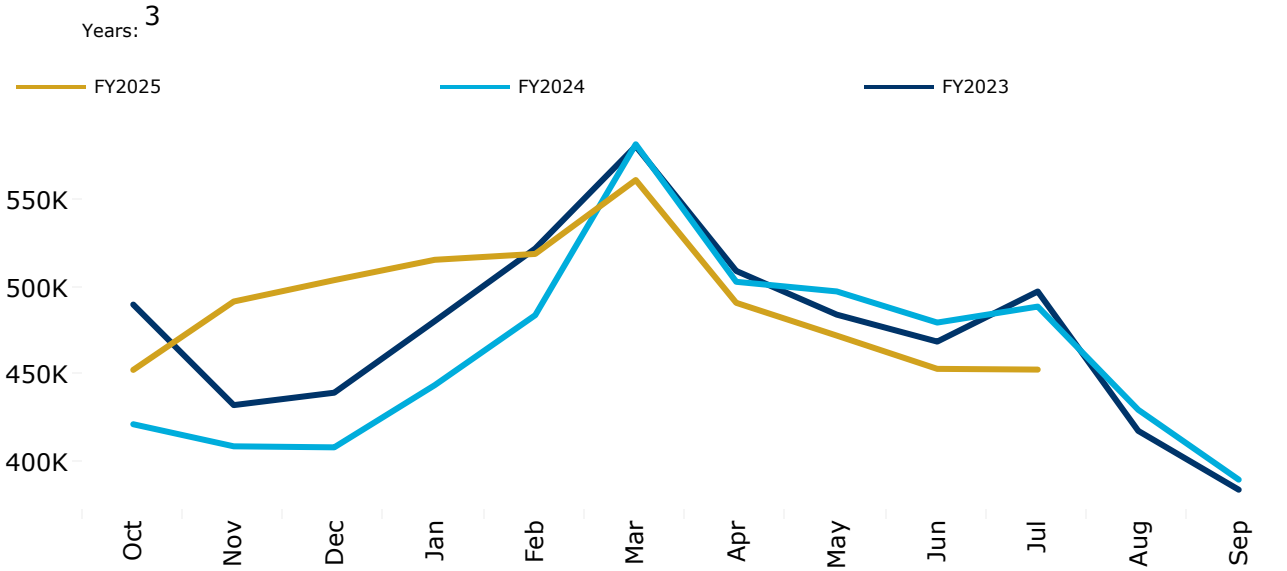


July Performance by Year

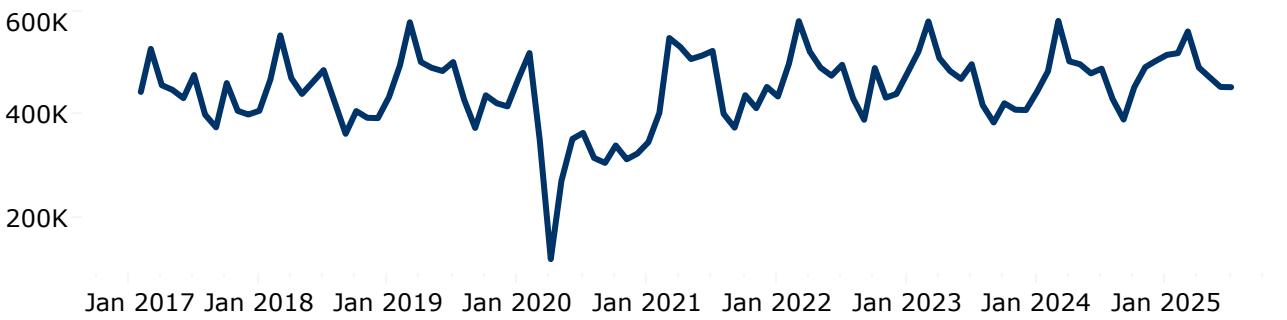
Pinellas County, FL



Demand YOY Comparison



Demand Long Term Trend

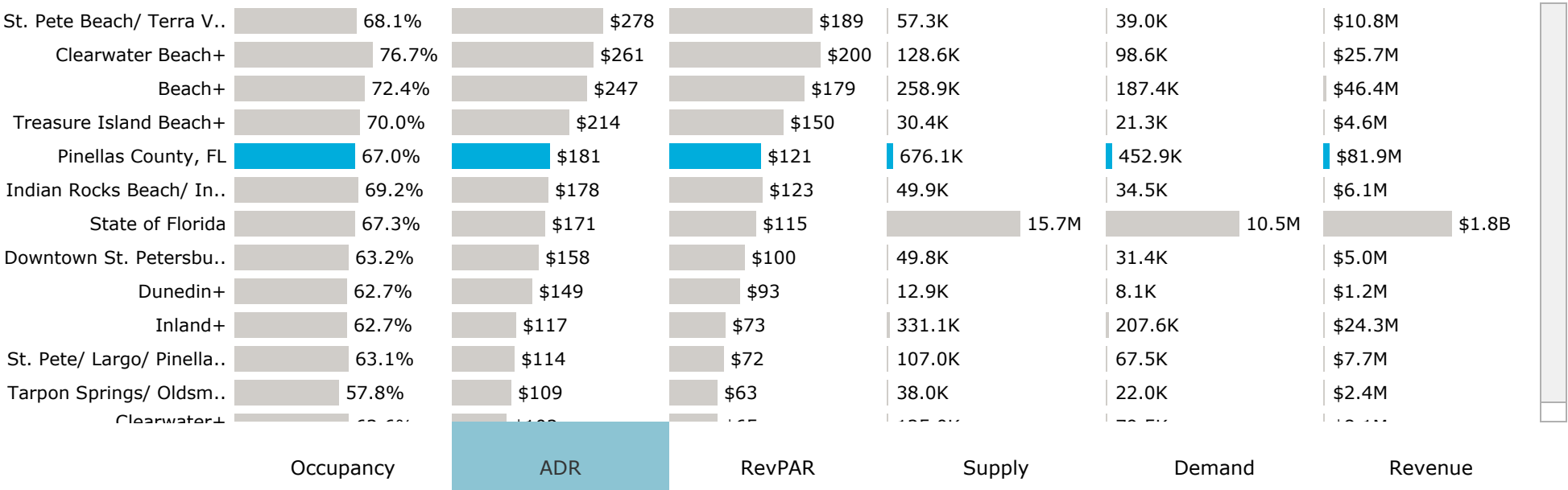


Submarkets Hotel Performance

Pinellas County, FL vs. Submarkets



July 2025, Submarket Hotel KPIs



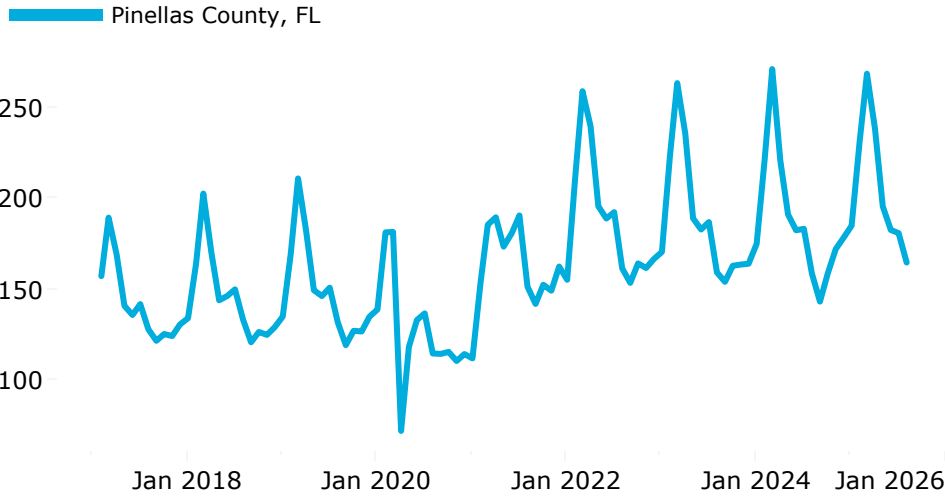
July 2025, Submarket Hotel Performance vs. Previous Year

	Occ	YOY	ADR	YOY	RevPAR	YOY	Total Supply	YOY	Rooms Sold	YOY	Room Revenue	YOY
Clearwater Beach+	76.7%	▼ -3.5%	\$261	▼ -4.1%	\$200	▼ -7.5%	128.6K	▼ -2.3%	98.6K	▼ -5.7%	\$25.7M	▼ -9.6%
Clearwater+	63.6%	▼ -6.6%	\$102	▲ 4.1%	\$65	▼ -2.8%	125.0K	▼ -4.5%	79.5K	▼ -10.8%	\$8.1M	▼ -7.2%
Downtown St. Petersburg+	63.2%	▲ 2.2%	\$158	▼ -12.0%	\$100	▼ -10.1%	49.8K	▼ -0.2%	31.4K	▲ 2.0%	\$5.0M	▼ -10.2%
Dunedin+	62.7%	▼ -3.9%	\$149	▼ -2.9%	\$93	▼ -6.7%	12.9K	▲ 0.0%	8.1K	▼ -3.9%	\$1.2M	▼ -6.7%
Indian Rocks Beach/ Indian Shores/ Madeir..	69.2%	▼ -3.6%	\$178	▲ 2.5%	\$123	▼ -1.2%	49.9K	▼ -4.2%	34.5K	▼ -7.7%	\$6.1M	▼ -5.3%
Pinellas County, FL	67.0%	▼ -4.3%	\$181	▼ -1.3%	\$121	▼ -5.5%	676.1K	▼ -3.2%	452.9K	▼ -7.4%	\$81.9M	▼ -8.6%
St. Pete Beach/ Terra Verde+	68.1%	▼ -6.6%	\$278	▲ 6.3%	\$189	▼ -0.7%	57.3K	▼ -31.9%	39.0K	▼ -36.3%	\$10.8M	▼ -32.3%
St. Pete/ Largo/ Pinellas Park+	63.1%	▼ -4.1%	\$114	▲ 1.8%	\$72	▼ -2.4%	107.0K	▼ -0.6%	67.5K	▼ -4.6%	\$7.7M	▼ -2.9%
Tarpon Springs/ Oldsmar/ Palm Harbor..	57.8%	▲ 3.6%	\$109	▼ -1.8%	\$63	▲ 1.8%	38.0K	▼ -0.5%	22.0K	▲ 3.1%	\$2.4M	▲ 1.3%
Treasure Island Beach+	70.0%	▼ -7.4%	\$214	▲ 1.7%	\$150	▼ -5.8%	30.4K	▼ -14.9%	21.3K	▼ -21.2%	\$4.6M	▼ -19.9%

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

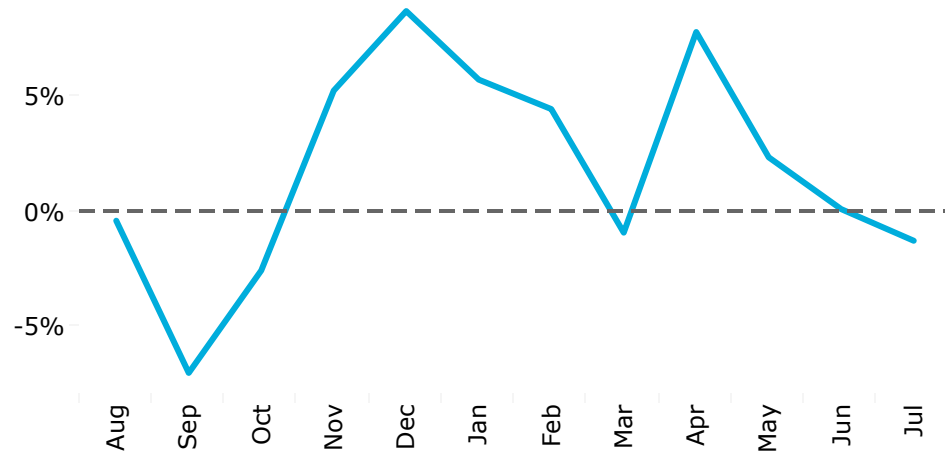
Source: STR

ADR Comparison



ADR vs. Same Month in Previous Year

Last 12 Months



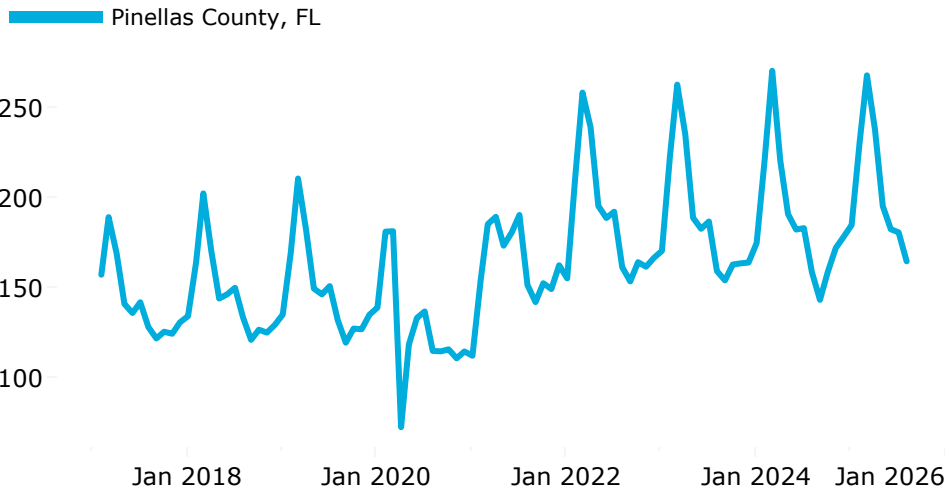
Competitive Markets Hotel Performance
Pinellas County, FL vs. Comp. Markets



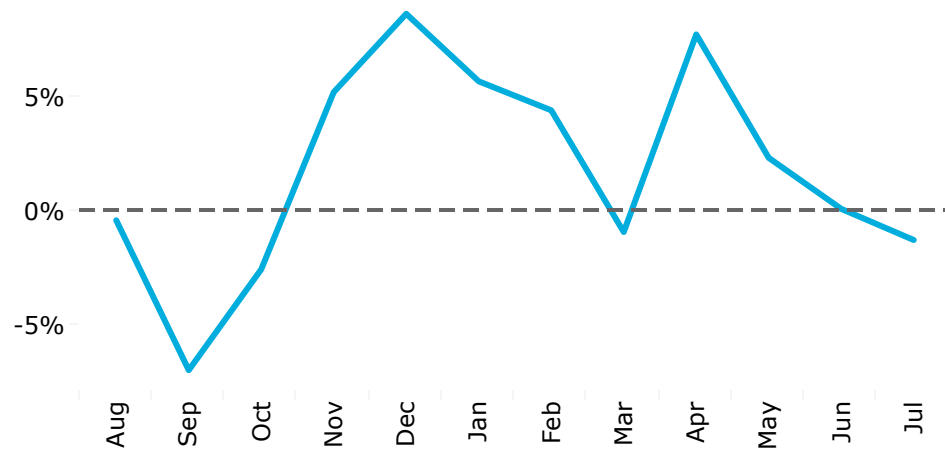
July 2025, Comp. Markets Hotel KPIs

Florida Keys	75.4%	\$289	\$218	332.3K	250.7K	\$72.5M
Bay County, FL	77.9%	\$202	\$157	344.1K	268.1K	\$54.1M
Orlando	71.2%	\$181	\$129	4.4M	3.2M	\$571.1M
Pinellas County, FL	67.0%	\$181	\$121	676.1K	452.9K	\$81.9M
Palm Beach County, FL	60.7%	\$181	\$110	605.0K	367.1K	\$66.4M
Naples, FL	63.8%	\$178	\$114	96.6K	61.6K	\$11.0M
Sarasota/Bradenton, FL	65.0%	\$178	\$116	390.3K	253.8K	\$45.3M
State of Florida	67.3%	\$171	\$115	15.7M	10.5M	\$1.8B
Miami/Hialeah, FL	69.4%	\$170	\$118	2.0M	1.4M	\$236.0M
Fort Myers, FL	56.5%	\$148	\$83	404.0K	228.4K	\$33.7M
Fort Lauderdale, FL	66.1%	\$145	\$96	1.2M	805.3K	\$117.1M
Hillsborough County, ..	66.8%	\$144	\$96	812.5K	543.0K	\$77.9M
Osceola County, FL	65.4%	\$135	\$89	778.8K	509.7K	\$69.0M
Occupancy		ADR	RevPAR	Supply	Rooms Sold	Revenue

ADR Comparison



ADR vs. Same Month in Previous Year
Last 12 Months



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

	Occ	YOY	ADR	YOY	RevPAR	YOY	Total Supply	YOY	Demand	YOY	Revenue	YOY
Bay County, FL	77.9%	▲ 3.8%	\$202	▲ 4.0%	\$157	▲ 7.9%	344.1K	▼ -1.2%	268.1K	▲ 2.5%	\$54.1M	▲ 6.6%
Florida Keys	75.4%	▼ -0.4%	\$289	▼ -1.4%	\$218	▼ -1.7%	332.3K	▲ 2.2%	250.7K	▲ 1.8%	\$72.5M	▲ 0.4%
Fort Lauderdale, FL	66.1%	▼ -3.3%	\$145	▼ -0.5%	\$96	▼ -3.7%	1.2M	▲ 0.8%	805.3K	▼ -2.5%	\$117.1M	▼ -3.0%
Fort Myers, FL	56.5%	▼ -5.9%	\$148	▲ 7.1%	\$83	▲ 0.8%	404.0K	▲ 10.6%	228.4K	▲ 4.1%	\$33.7M	▲ 11.6%
Hillsborough County..	66.8%	▼ -1.9%	\$144	▼ -0.8%	\$96	▼ -2.7%	812.5K	▲ 1.8%	543.0K	▼ -0.1%	\$77.9M	▼ -0.9%
Miami/Hialeah, FL	69.4%	▼ -2.0%	\$170	▼ -2.3%	\$118	▼ -4.2%	2.0M	▼ -0.6%	1.4M	▼ -2.6%	\$236.0M	▼ -4.8%
Naples, FL	63.8%	▲ 7.4%	\$178	▼ -5.2%	\$114	▲ 1.8%	96.6K	▲ 0.0%	61.6K	▲ 7.4%	\$11.0M	▲ 1.8%
Orlando	71.2%	▲ 0.4%	\$181	▲ 4.2%	\$129	▲ 4.6%	4.4M	▲ 1.4%	3.2M	▲ 1.8%	\$571.1M	▲ 6.1%
Osceola County, FL	65.4%	▼ -1.7%	\$135	▲ 4.0%	\$89	▲ 2.2%	778.8K	▲ 2.6%	509.7K	▲ 0.8%	\$69.0M	▲ 4.8%
Palm Beach County,..	60.7%	▼ -1.4%	\$181	▲ 1.4%	\$110	▲ 0.0%	605.0K	▲ 2.3%	367.1K	▲ 0.8%	\$66.4M	▲ 2.2%
Pinellas County, FL	67.0%	▼ -4.3%	\$181	▼ -1.3%	\$121	▼ -5.5%	676.1K	▼ -3.2%	452.9K	▼ -7.4%	\$81.9M	▼ -8.6%
Sarasota/Bradenton..	65.0%	▲ 0.0%	\$178	▲ 9.2%	\$116	▲ 9.2%	390.3K	▲ 0.2%	253.8K	▲ 0.2%	\$45.3M	▲ 9.4%
State of Florida	67.3%	▼ -1.2%	\$171	▲ 1.7%	\$115	▲ 0.4%	15.7M	▲ 1.2%	10.5M	▲ 0.0%	\$1.8B	▲ 1.7%

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

Source: STR



Pinellas County Tourist Development Tax Collections

July 2025

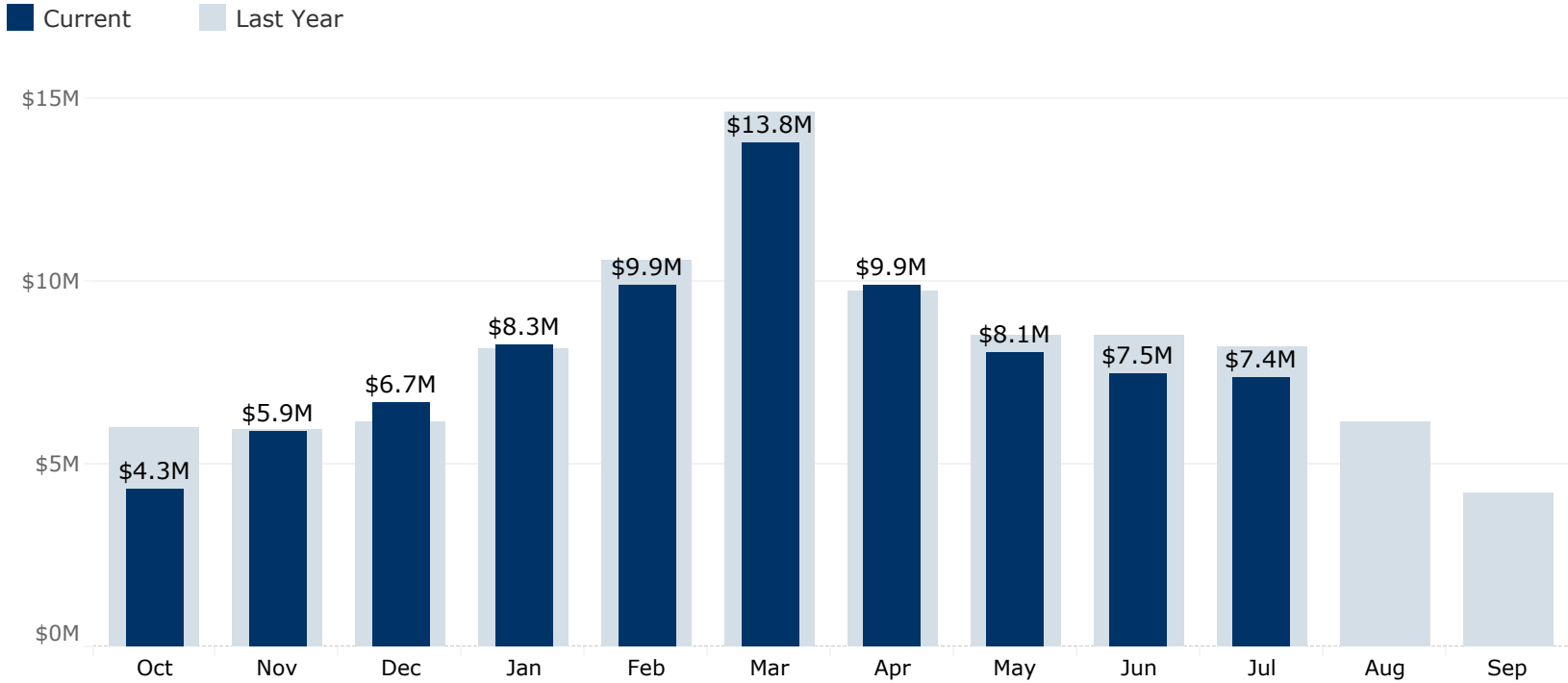


Tourist Development Tax Collections
\$7.4M
-9.8% YOY | +25.5% vs. 2019
Gross Tax Collected

Tourist Development Tax Collections by Month

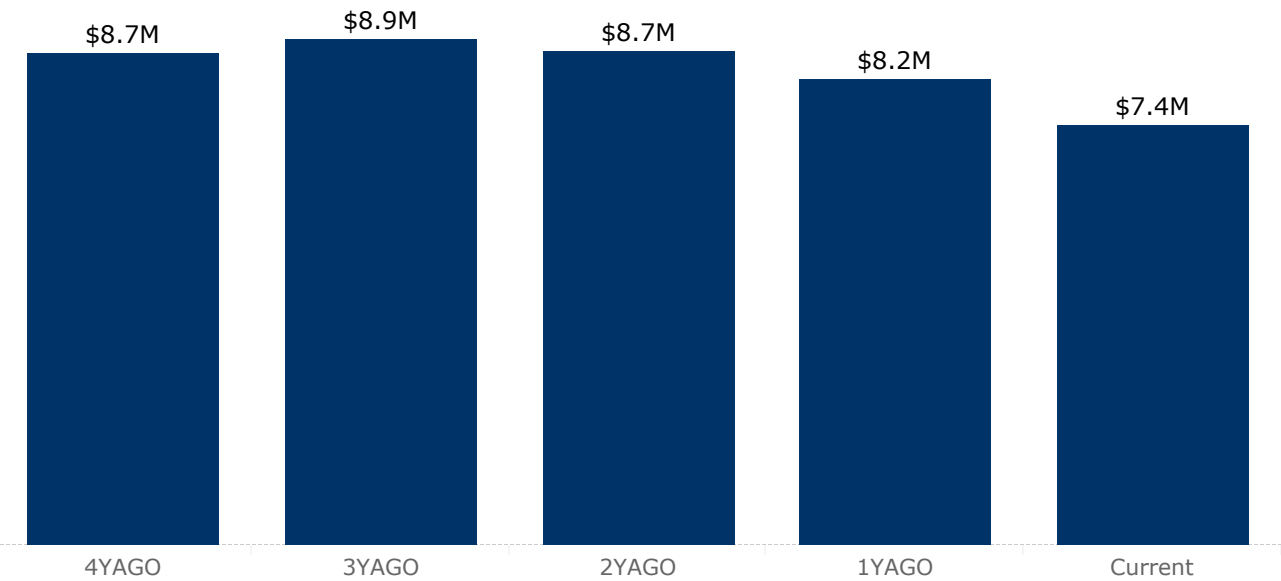
Fiscal Year 2025

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		
-28.1%	-0.8%	+8.6%	+1.6%	-6.3%	-5.9%	+1.6%	-5.1%	-12.2%	-9.8%		



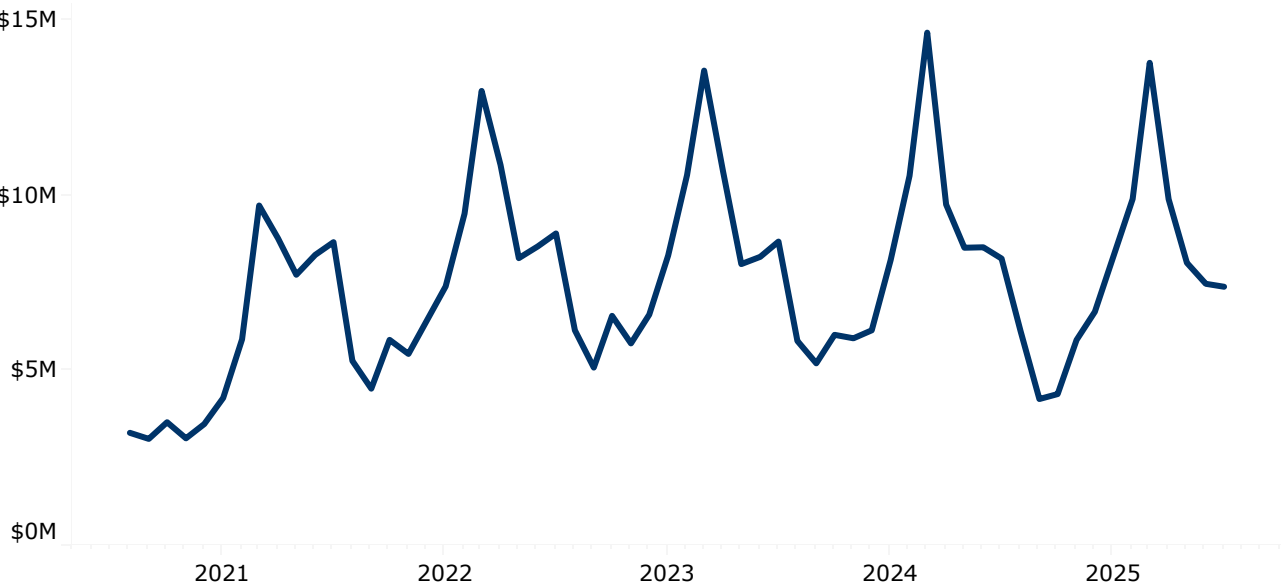
Tourist Development Tax Collections

July 2025 vs. comparable months over the past 5 years



Tourist Development Tax Collections

Long Term Trend





Pinellas County Local Option Tax Collections

July 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%		
Clearwater/Clearwater Beach	35.79%	33.29%	30.53%	24.74%	28.67%	31.71%	32.54%	32.65%	31.04%	32.20%		
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%		
St Petersburg	25.35%	19.57%	18.29%	16.59%	15.65%	13.48%	13.00%	12.21%	10.71%	9.03%		
Treasure Island	2.20%	2.67%	2.99%	2.42%	3.31%	3.44%	3.21%	3.57%	3.80%	3.94%		
Madeira Beach	1.93%	1.48%	1.95%	1.59%	1.58%	1.70%	1.39%	1.45%	1.63%	1.51%		
N Redington Beach/Redington Shores	0.86%	0.86%	0.81%	1.26%	1.12%	1.35%	1.21%	1.17%	1.23%	1.24%		
Dunedin	2.13%	1.51%	1.59%	1.21%	1.42%	1.42%	1.27%	1.23%	1.26%	1.19%		
Oldsmar/Safety Harbor	3.81%	3.15%	2.86%	2.45%	2.06%	1.31%	1.50%	1.20%	0.73%	1.10%		
Indian Rocks Beach	0.24%	0.90%	0.98%	0.92%	1.01%	1.41%	0.89%	0.83%	1.25%	1.00%		
Palm Harbor	2.25%	1.36%	1.31%	1.38%	1.49%	1.04%	1.08%	0.90%	0.65%	0.55%		
Indian Shores	0.17%	0.29%	0.45%	0.35%	0.50%	0.65%	0.40%	0.34%	0.60%	0.46%		
Tarpon Springs	1.48%	0.93%	0.73%	0.61%	0.53%	0.59%	0.45%	0.40%	0.42%	0.41%		
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%		
Total	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

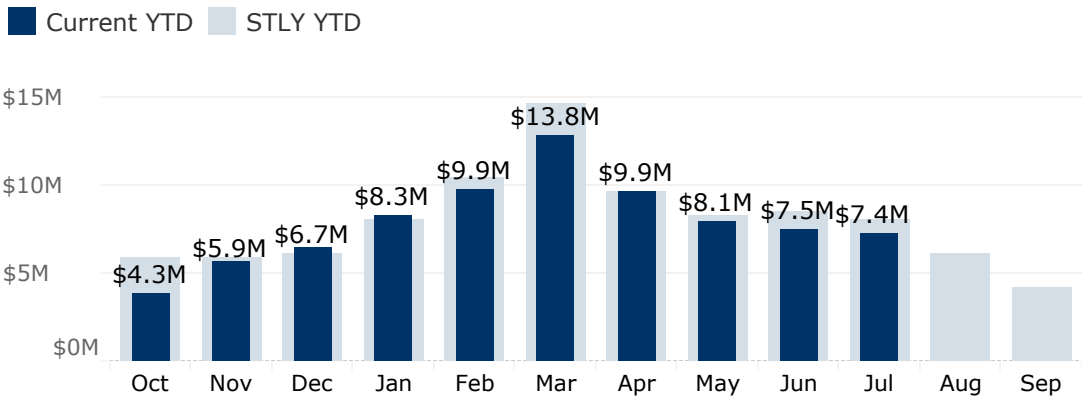
Tourist Development Tax Collections

July 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

