

# Future Partners

## The State of the American Traveler & FY25 Visit St. Pete-Clearwater Visitor Profile



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# The State of the American Traveler





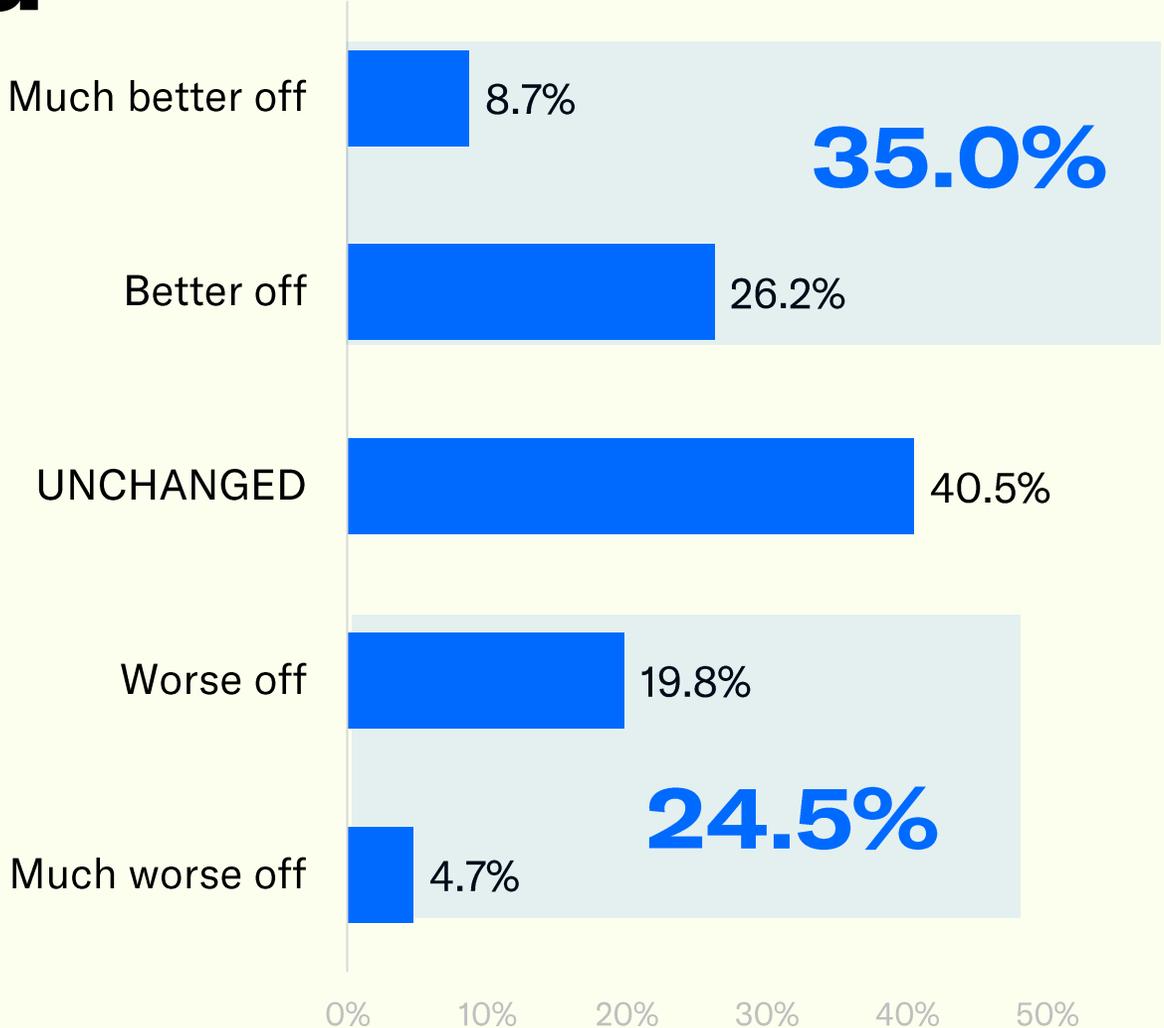
# Traveler Sentiment



# Current Finances: A Fluctuating Mood

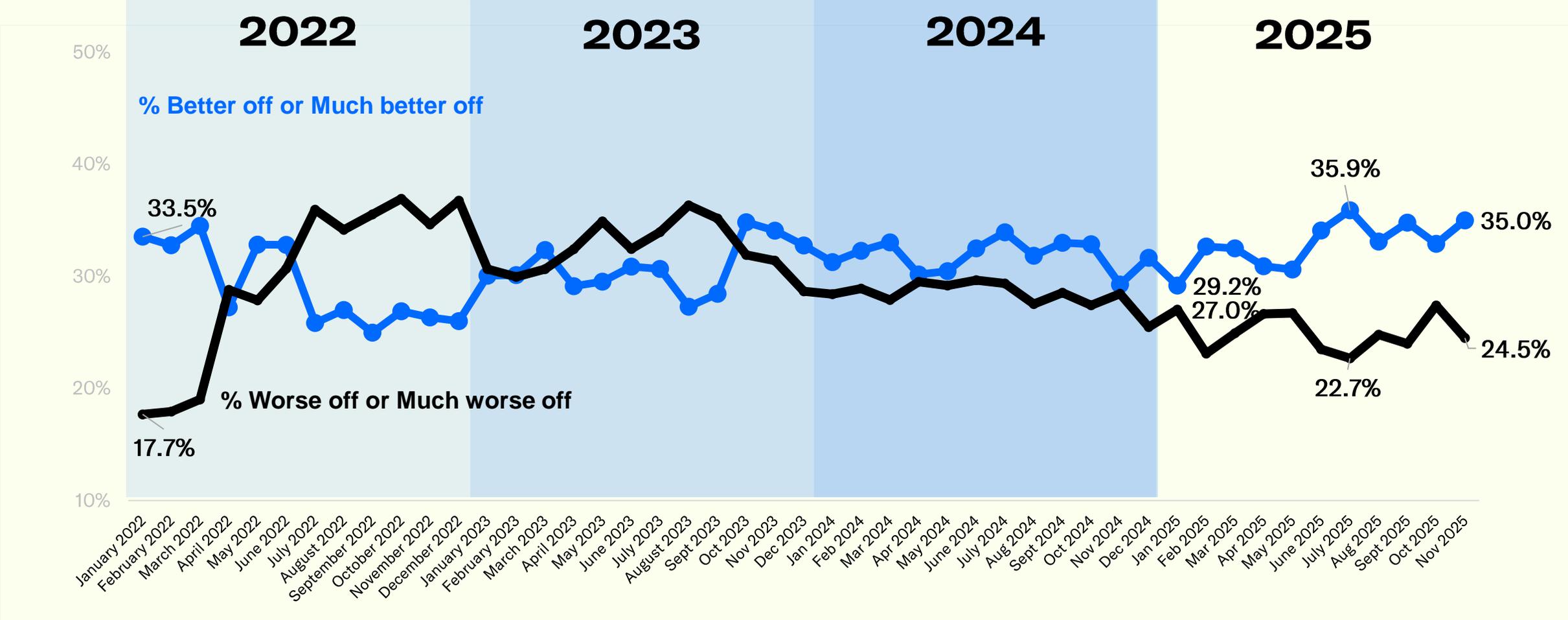
**Question:**

Would you say that you (and your household) are better off or worse off financially than you were a year ago?



# Current Finances: A Fluctuating Mood

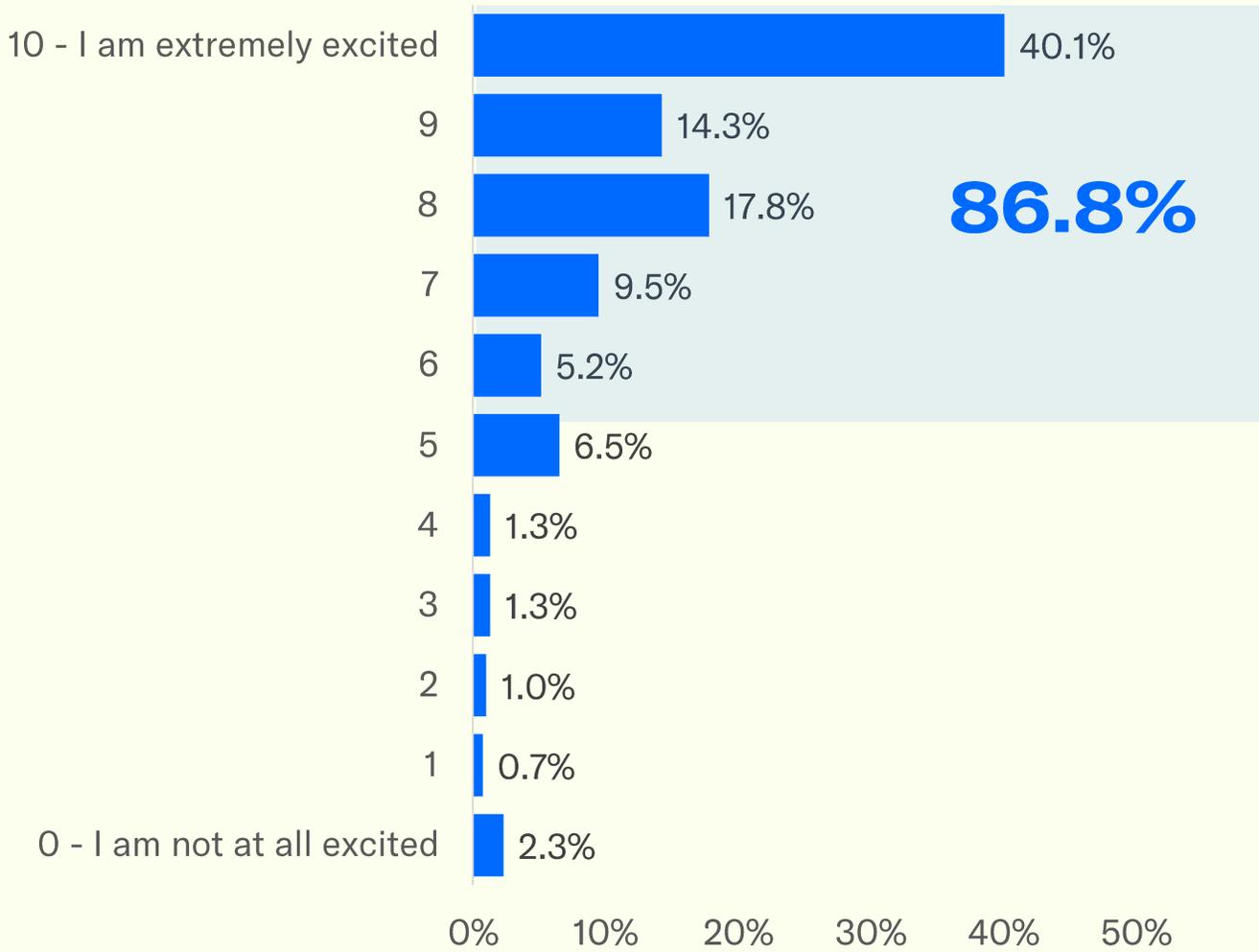
**Question:** Would you say that you (and your household) are better off or worse off financially than you were a year ago?



# Americans' Appetite for Travel Still Alive and Well

## Question:

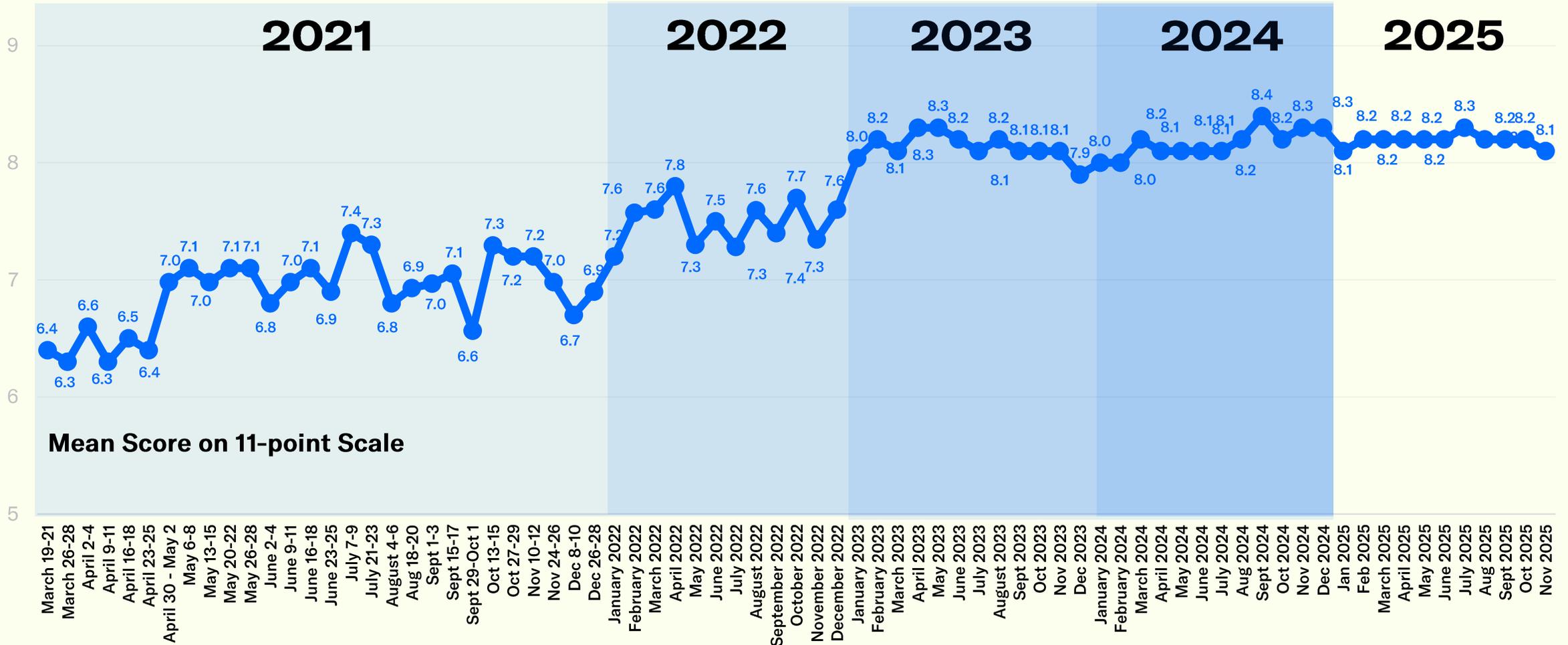
Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



# Americans' Appetite for Travel Still Alive and Well

## (All American Travelers)

**Question:** Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



# Spending Confidence Inches Upward

## Question:

Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?

Yes - It is a very good time

8.8%

**35.4%**

Yes - It is a good time

26.5%

It is neither a good time nor bad time

36.7%

No - It is a bad time

19.3%

No - It is a very bad time

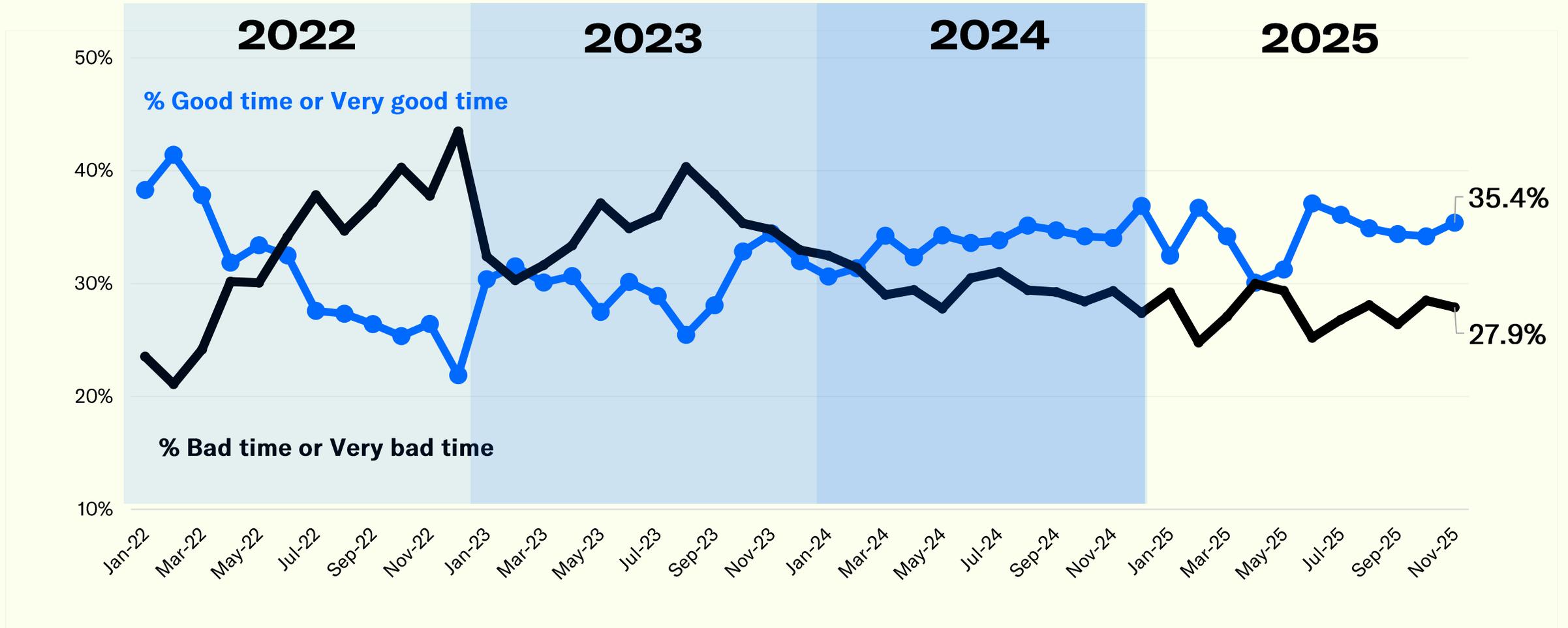
8.5%

**27.9%**

0% 10% 20% 30% 40%

# Spending Confidence Inches Upward

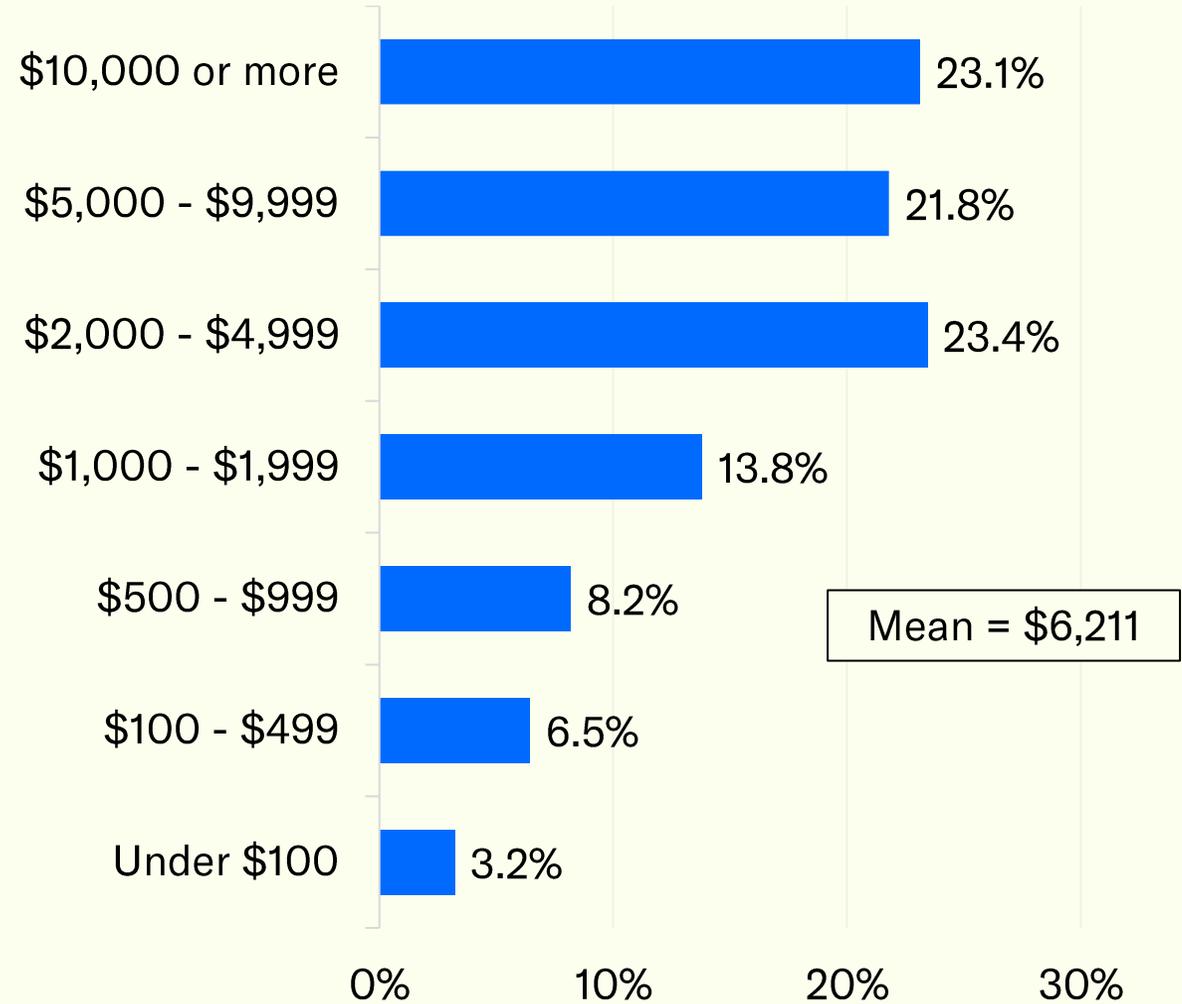
Question: Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?



# Travel Budgets Reach a High (All American Travelers)

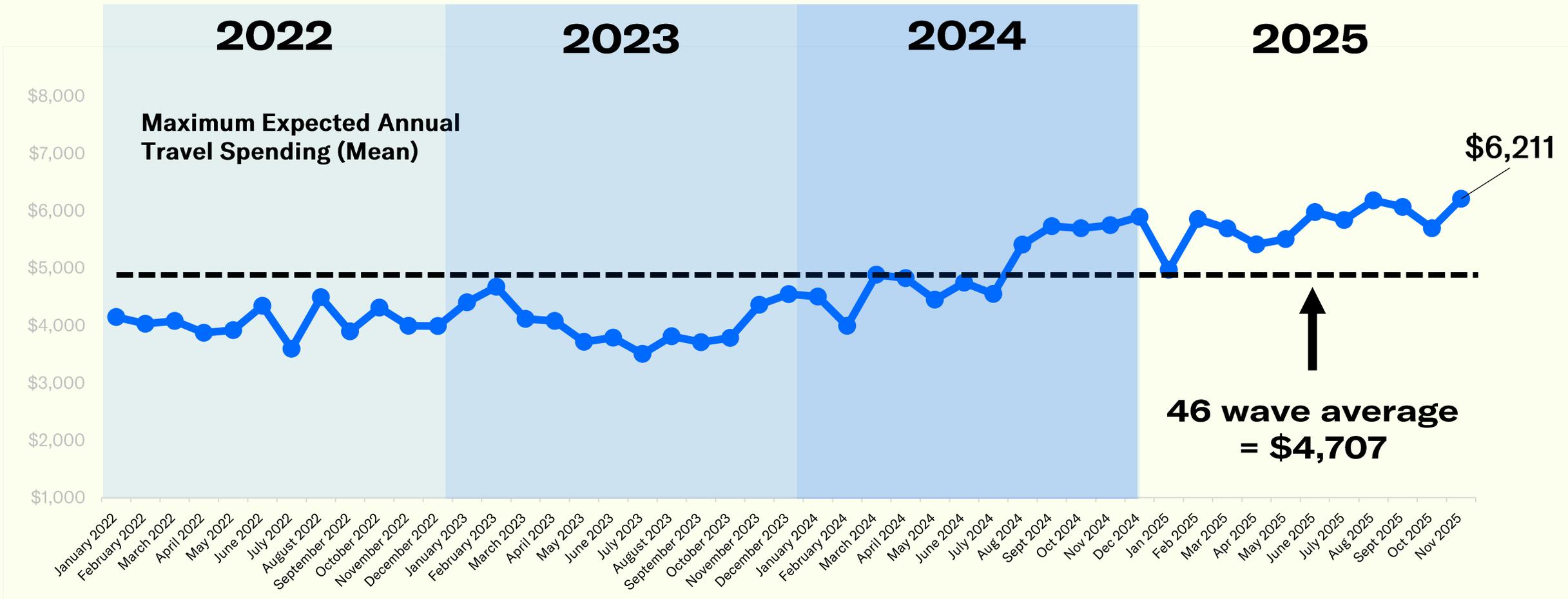
## Question:

How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS?



# Travel Budgets Reach a High (All American Travelers)

**Question:** How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months):





# Travel Trends to Watch for 2026



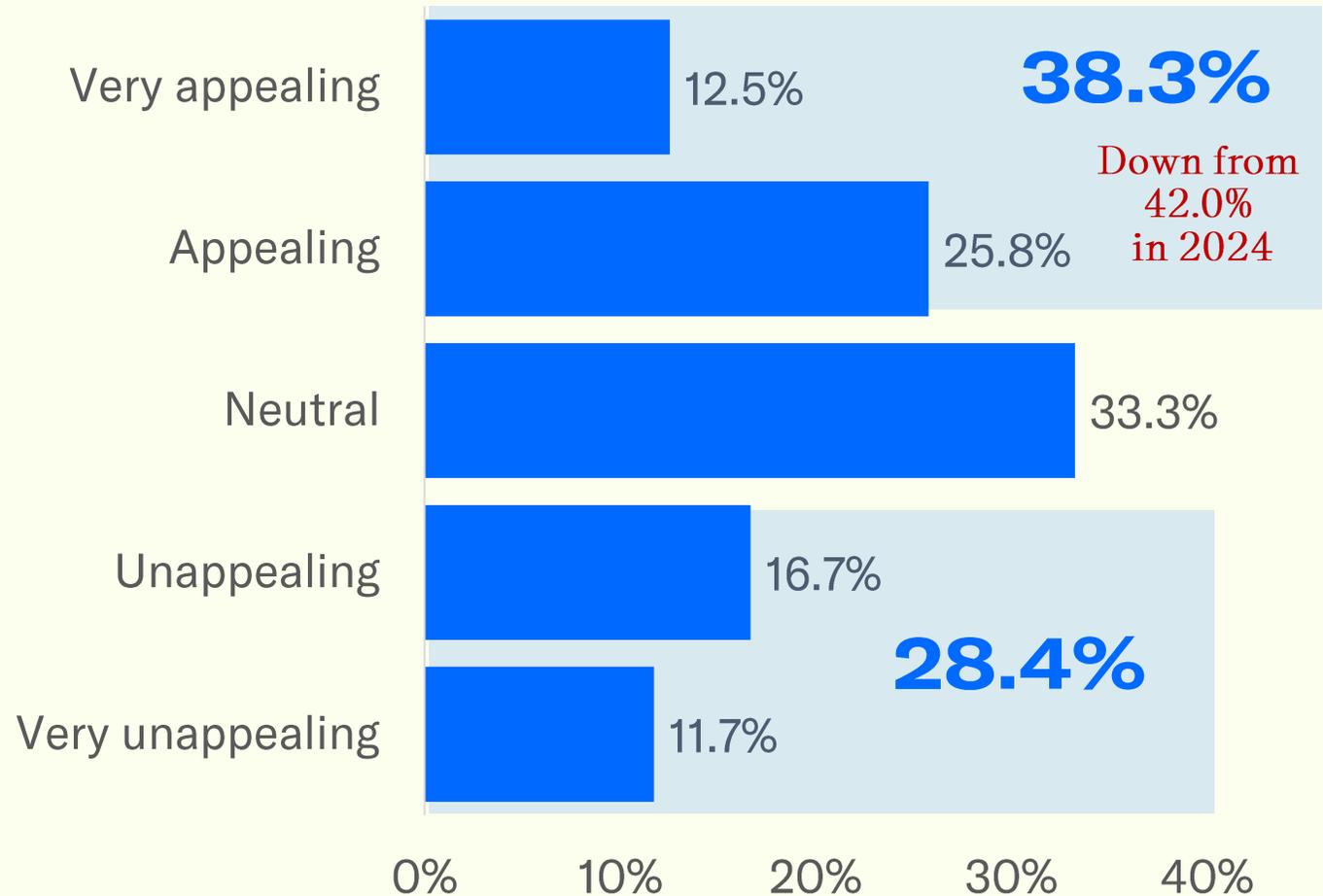
# Gig-tripping

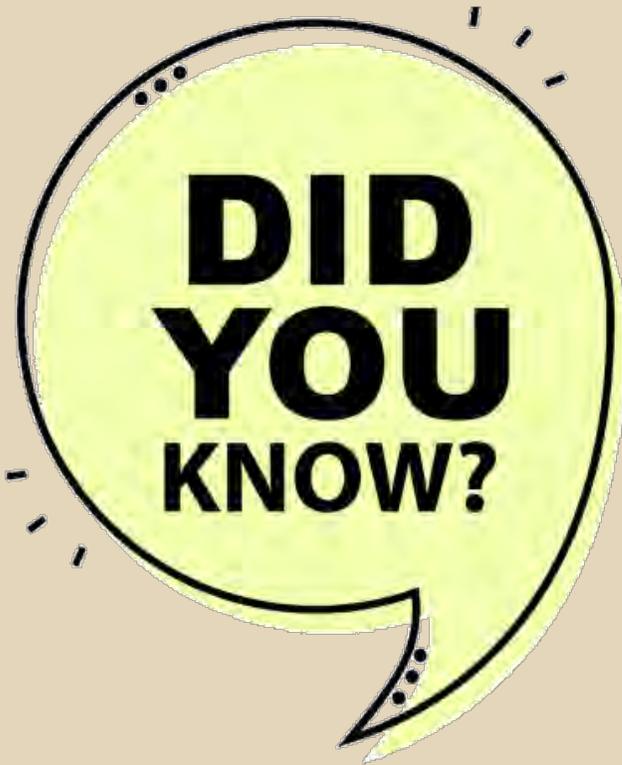
...taking trips around major  
concerts, music festivals.



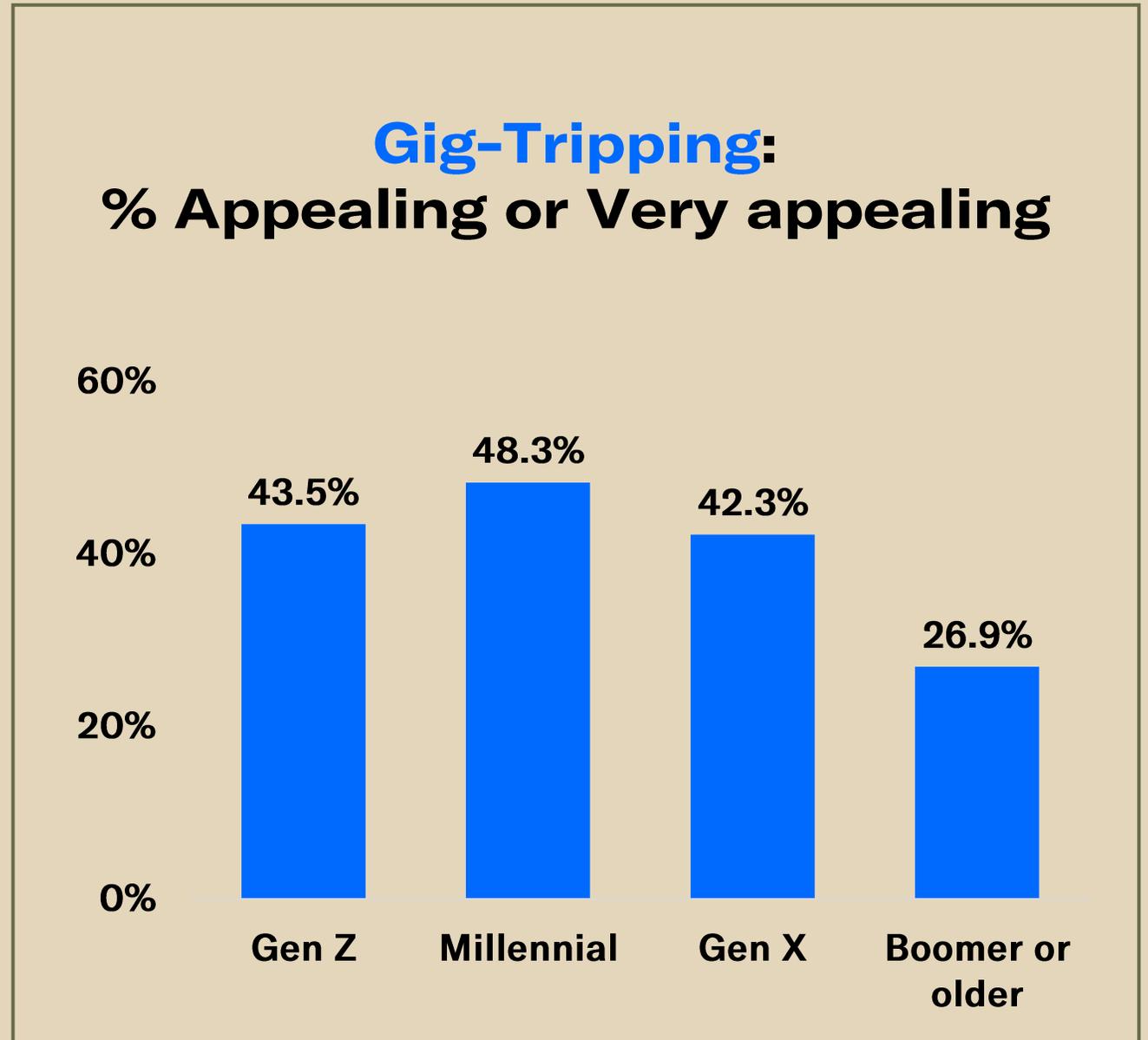
# Gig-trips: The Beat Drops. But Demand Drops Too

**Question:** How appealing is the idea of taking trips around major concerts, music festivals, or other live events in 2026?





**With increasing age, gig-tripping drops in appeal significantly.**



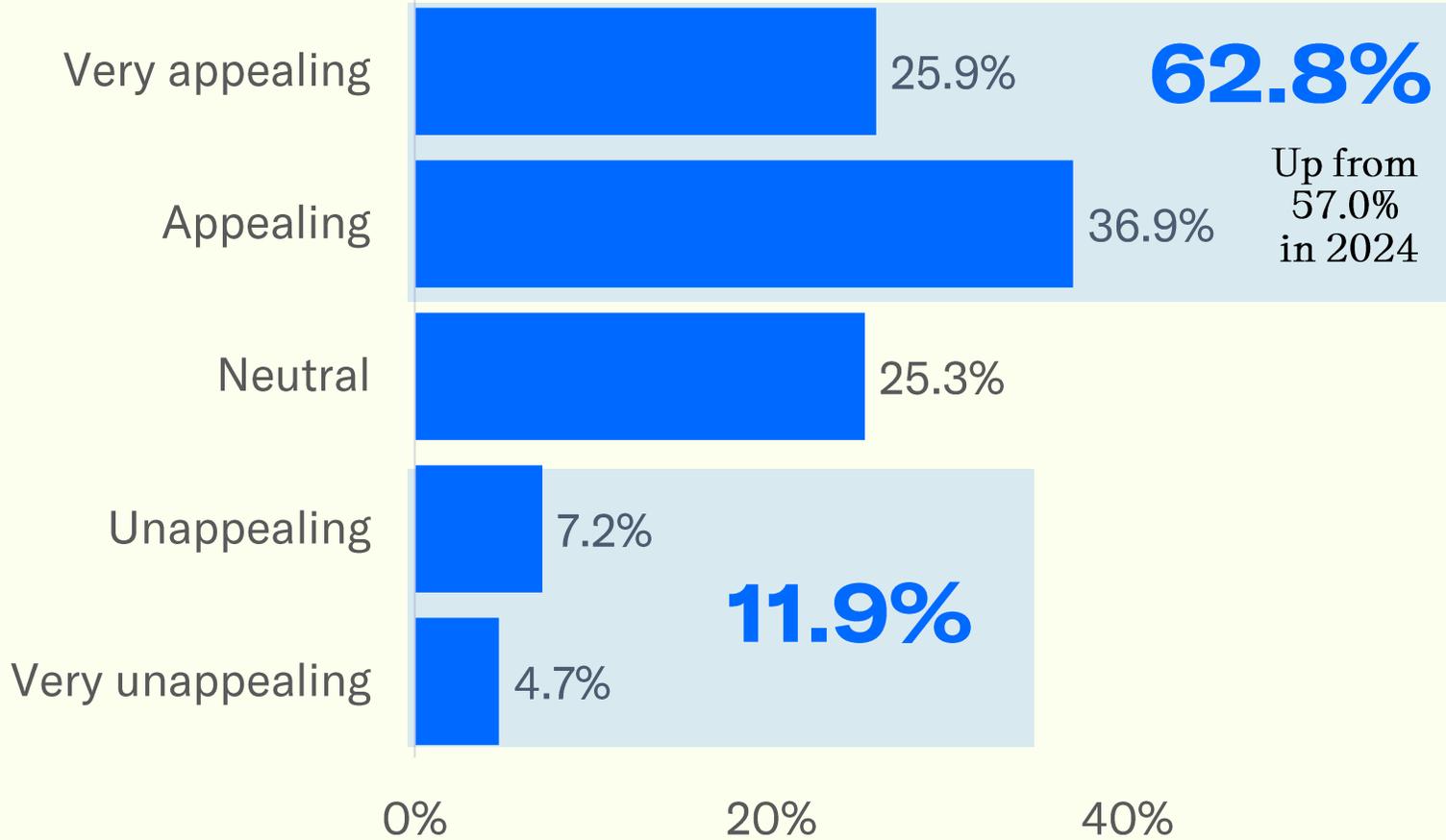
# Foodie Trips

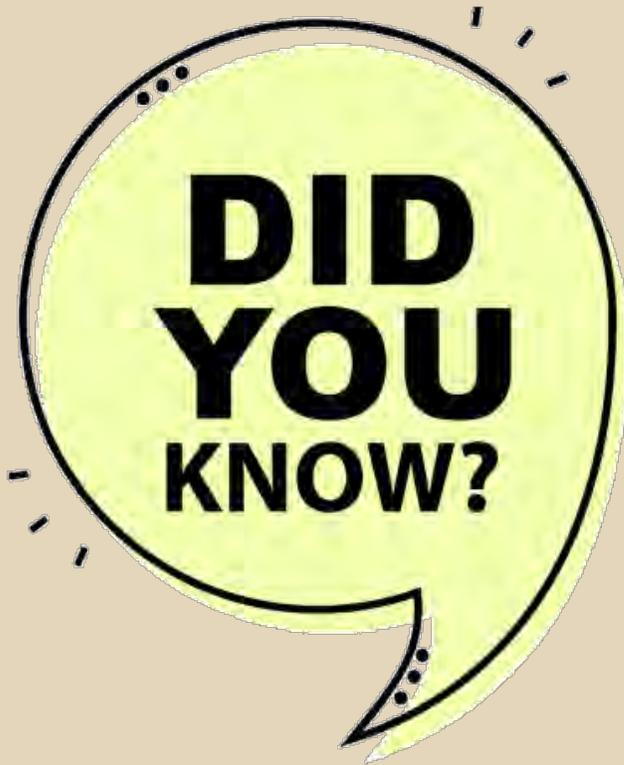
...traveling to explore  
destinations known for their  
food and drink experiences.



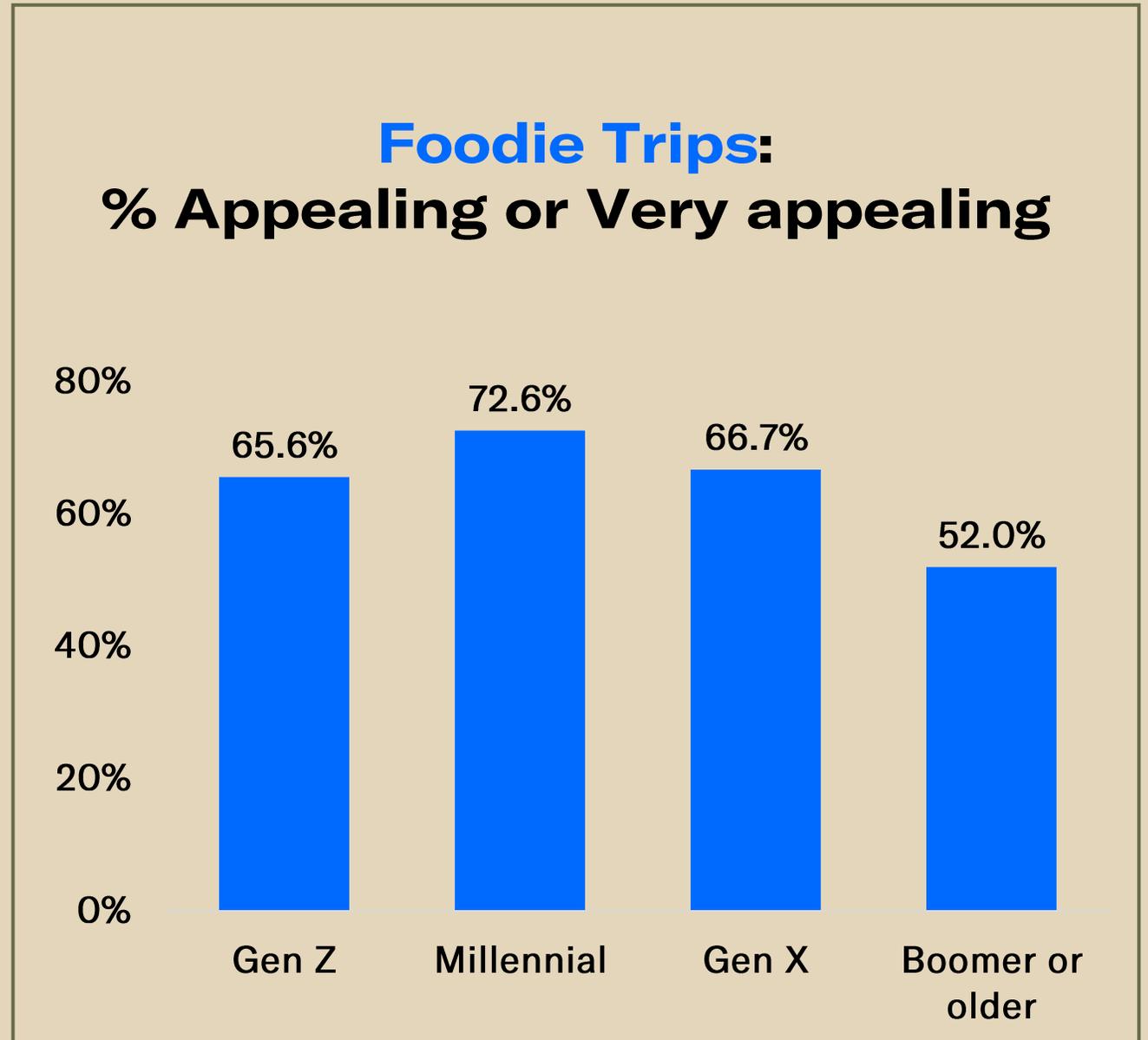
# From Street Eats to Michelin Feasts, Americans Keep Wanting Food-Driven Trips

**Question:** How appealing is the idea of taking foodie trips in 2026?





**Millennials are the sweet-spot for food marketing**



A person is sleeping in a bed in a dimly lit room. The room is warm and cozy, with a nightstand next to the bed holding a lamp and a digital clock. The clock shows the time 1:47. The person is wearing a white t-shirt and dark pants. The bed has white sheets and a dark blanket. The overall atmosphere is peaceful and relaxing.

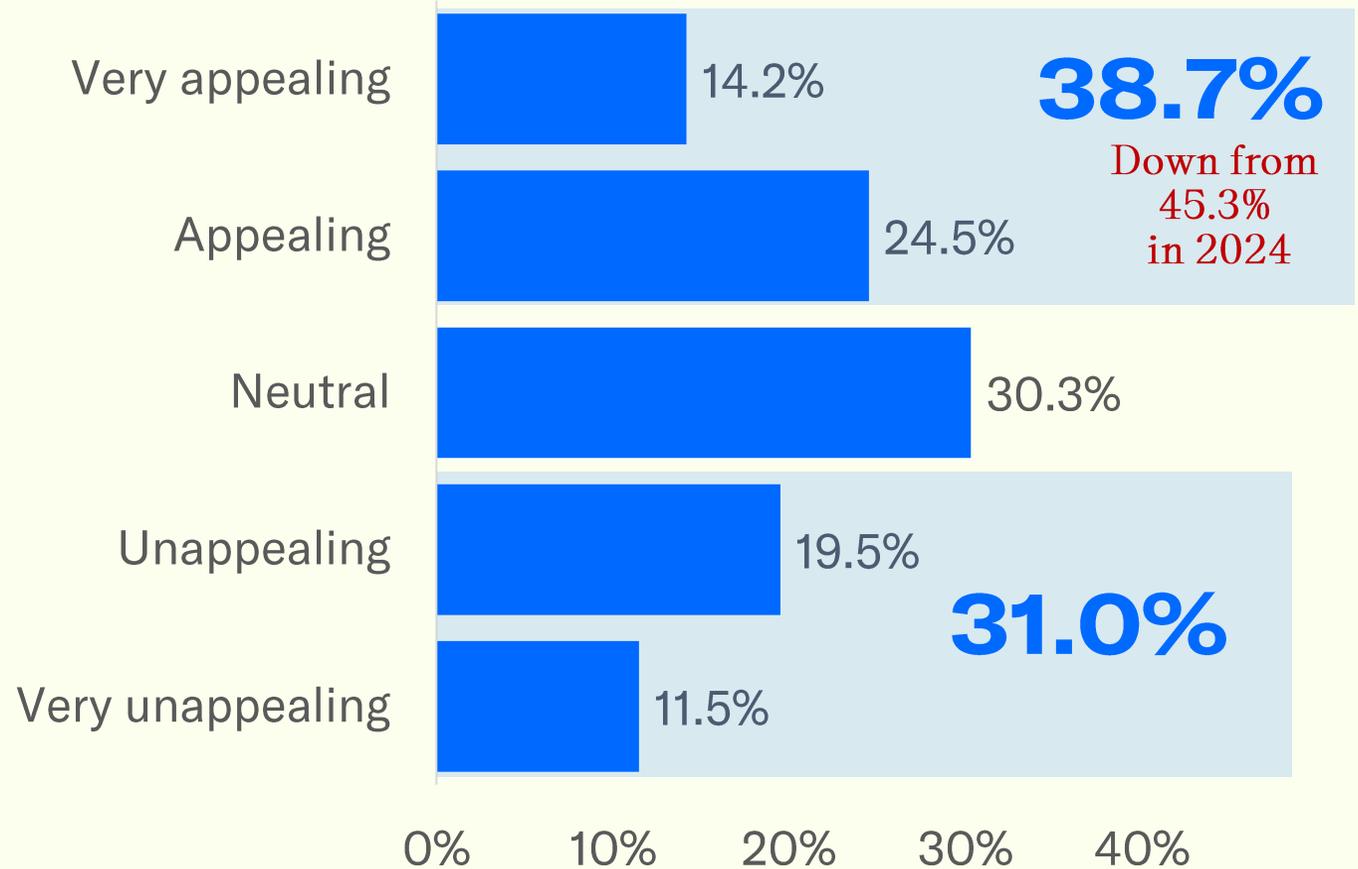
# Sleep Tourism

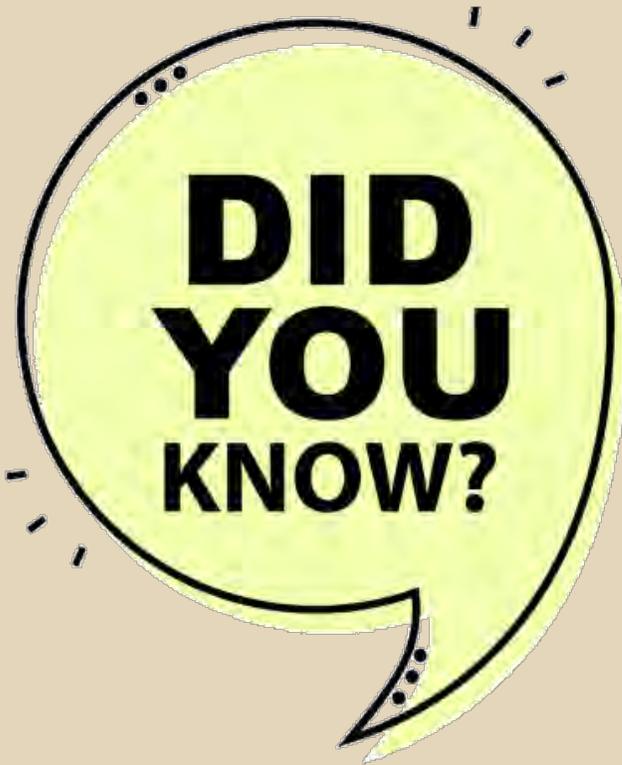
...trips focused on rest,  
relaxation, and improving  
your sleep in 2026?



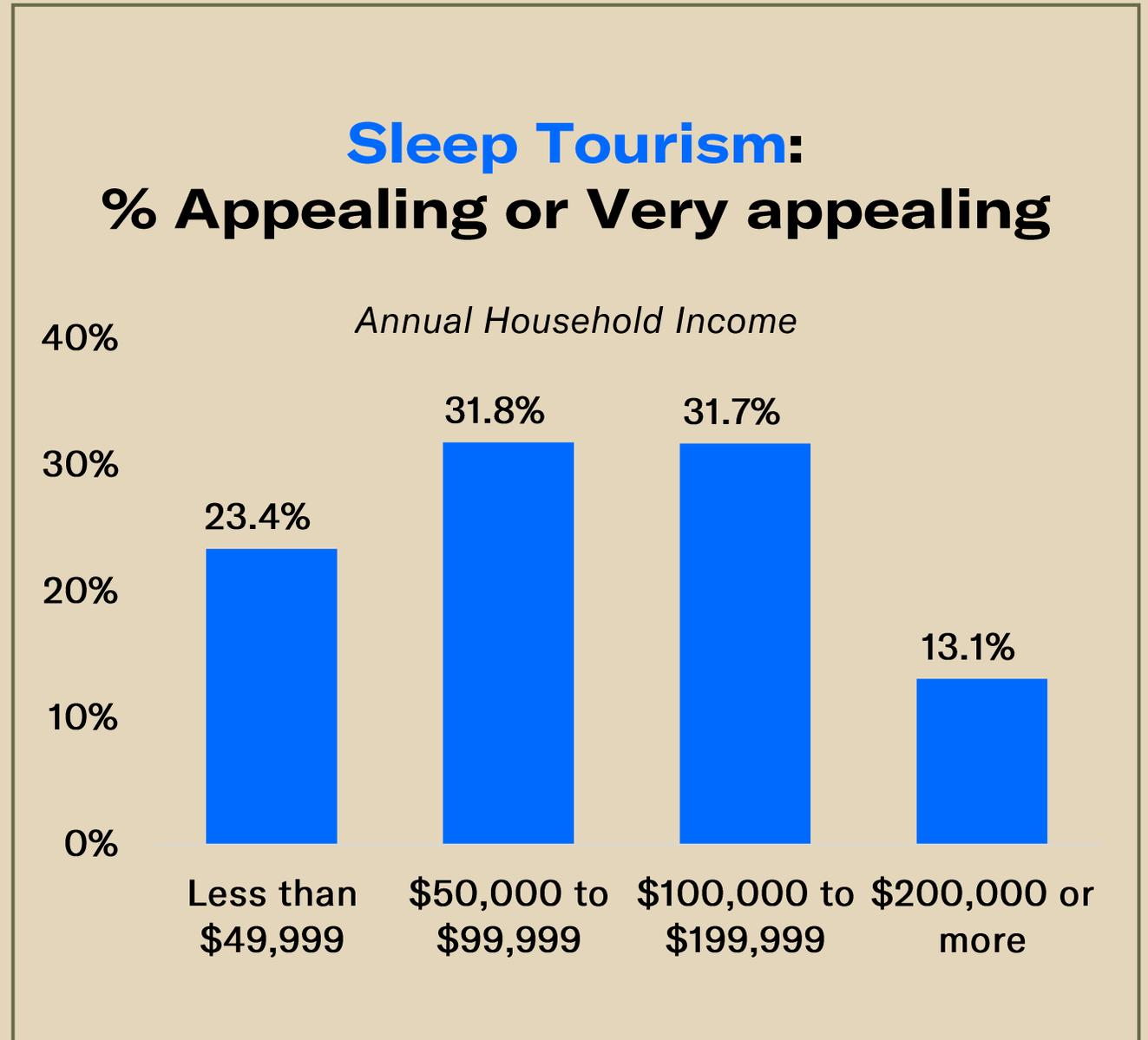
# Is Rest the New Luxury? Many Americans Want a Vacation and a Snooze.

**Question:** How appealing is the idea of trips focused on rest, relaxation, and improving your sleep in 2026?





**Middle income bands need more sleep than others.**



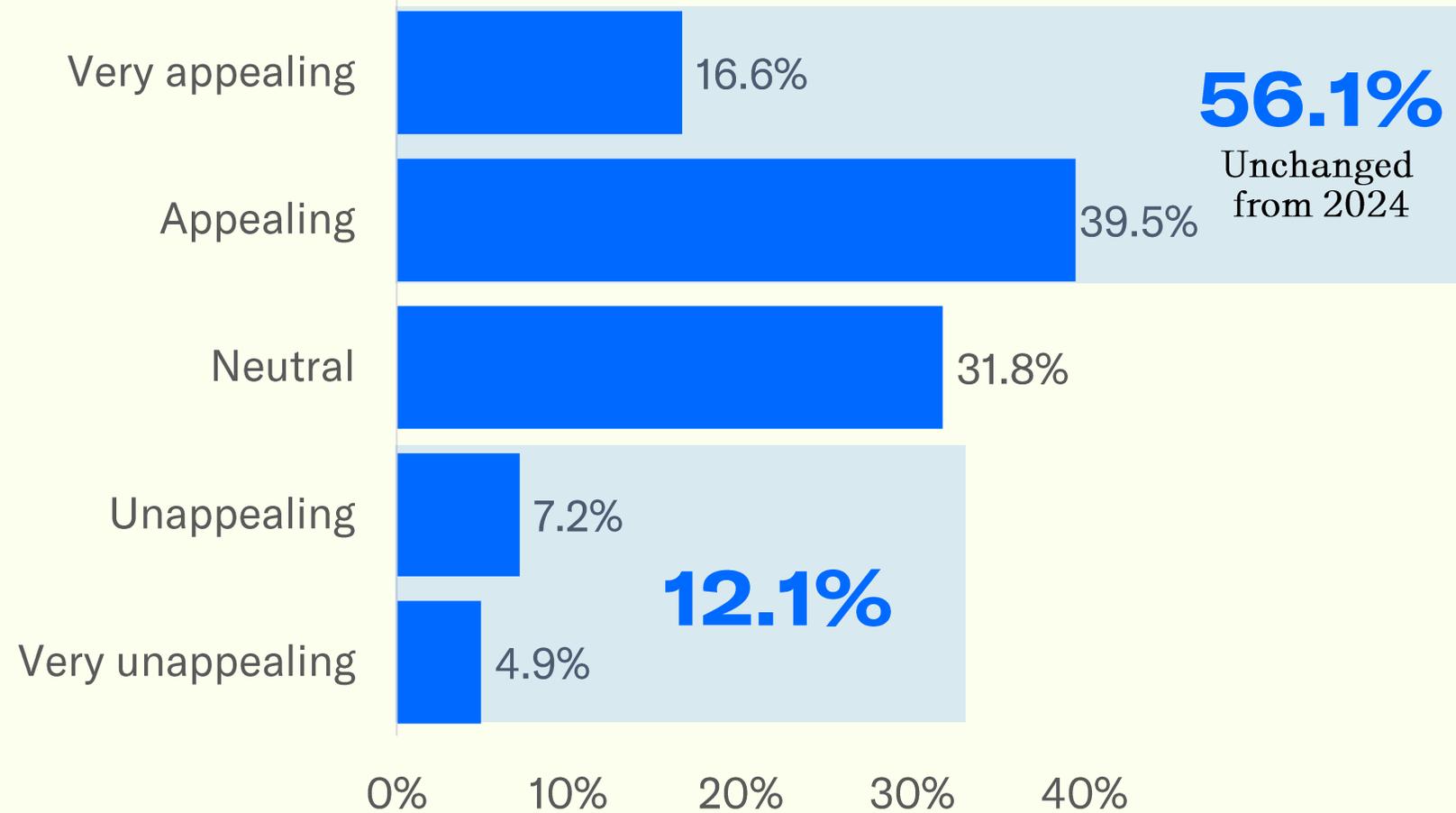
# Experiential Travel

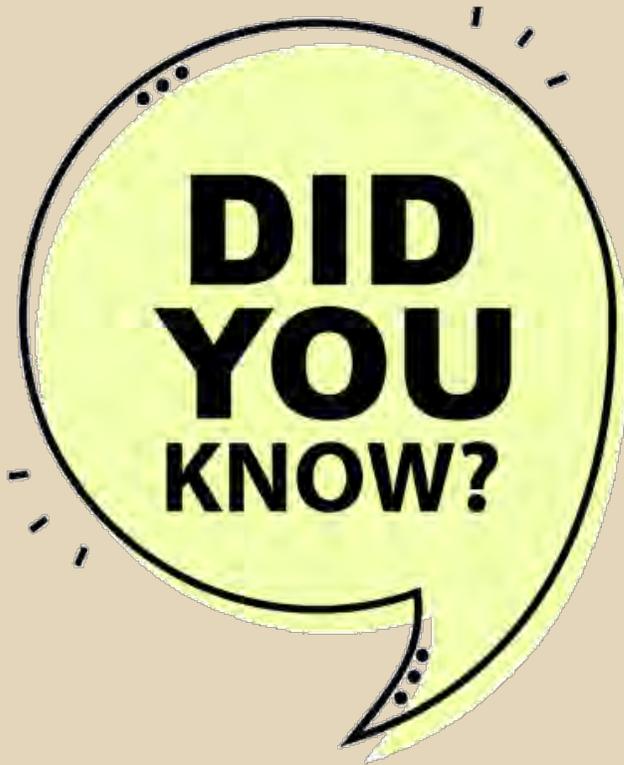
...participating in immersive, hands-on experiences that connect you with a destination's culture, history, or environment.



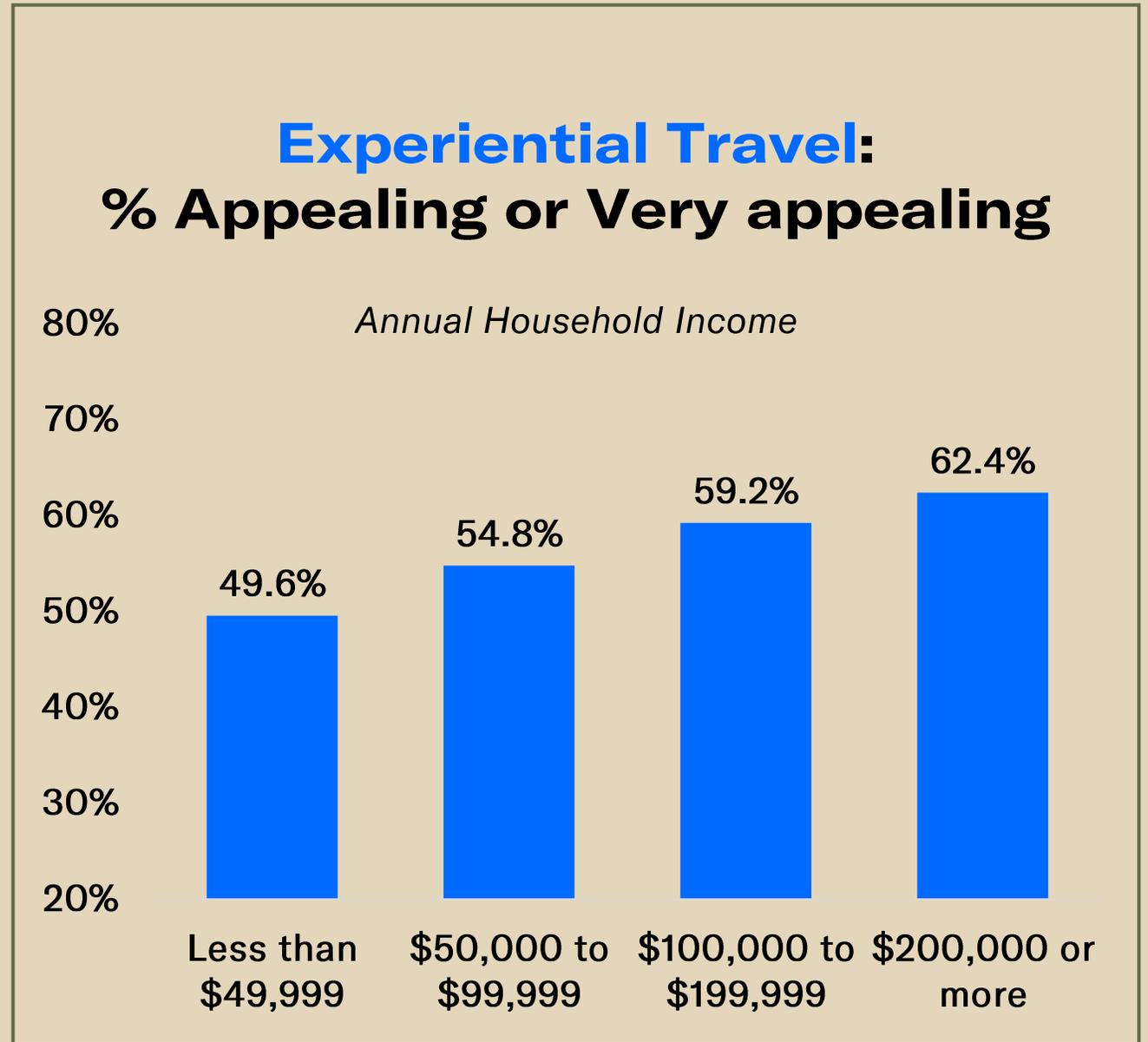
# Experiential Travel: Hands-On Experiences Win Travelers' Hearts

**Question:** How appealing is the idea of participating in immersive, hands-on experiences that connect you with a destination's culture, history, or environment in 2026?





**When marketing experiential travel, think affluent travelers.**



# Bottomline: Opportunity Abounds

*Specialty trip types* are becoming part of how many people think about travel, and destinations can tap into these trends by showcasing what makes their experiences special.



# St. Pete-Clearwater: Visitor Profile



# Methodology

- In-person, in-market interviews of Pinellas County visitors, intercepted at random at tourism points throughout the County (n=400 per month; 4,800+ annual). Survey responses are input via tablet by the Future Partners' interviewer, save for demographic questions, which are self administered by the visitor
- Employing this methodology is critical for the research to accomplish explaining *who* visitors are, *why* they came, and fully *how* they spent money –across lodging types
- Secondary data inputs (TDT, STR, airlift, mobile data) are incorporated for data weighting and modeling
- New in 2026: online surveys of recent visitors



# Visitor Summary

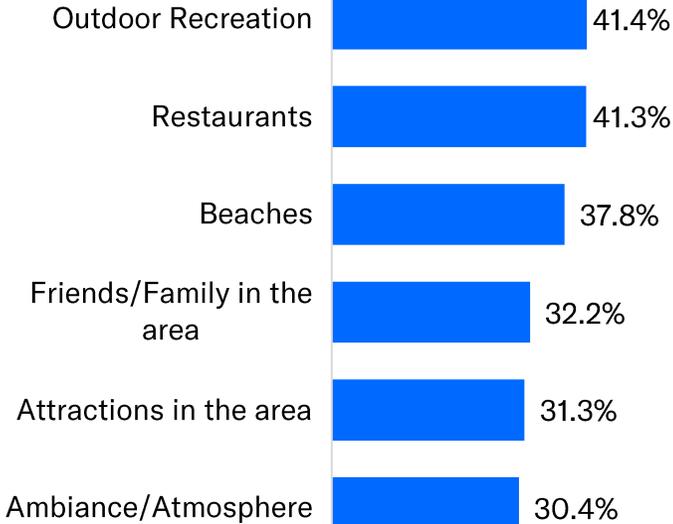
# Definitions

- **North County Communities Traveler:**  
Visited at least one of the Dunedin, Tarpon Springs, Safety Harbor, Palm Harbor, or Oldsmar communities on their trip
- **Greater Clearwater Beach Traveler:**  
Visited at least one of the Clearwater, Clearwater Beach, Indian Shores/Indian Rocks, or North Redington Beach/Redington Shores communities on their trip
- **Greater St. Pete Traveler:**  
Visited the St. Petersburg community on their trip
- **South County Beaches Traveler:**  
Visited at least one of the St. Pete Beach, Pass-A-Grille, Treasure Island, or Madeira Beach communities on their trip



# Key Insights: Average St. Pete-Clearwater Traveler

## Important Factors for Destination Selection



## Average Daily Spending Per Travel Party



**\$330**

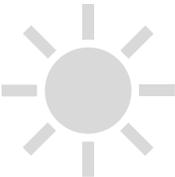
## Travel Party Size



**3.6**

24.6% traveled with children

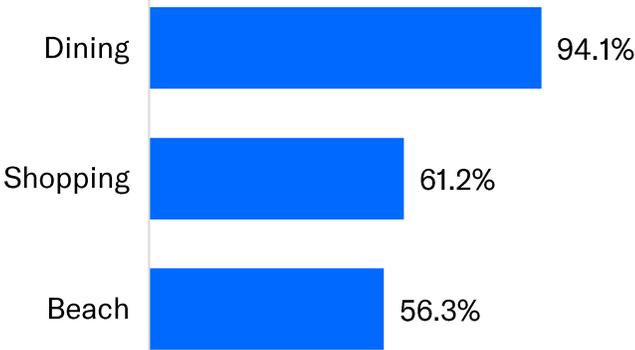
## Average Length of Stay: Overnight Visitors



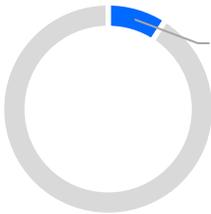
**5.0** days

**4.2** nights

## Top Activities



## International Visitation



International  
9.1%

## Origin States



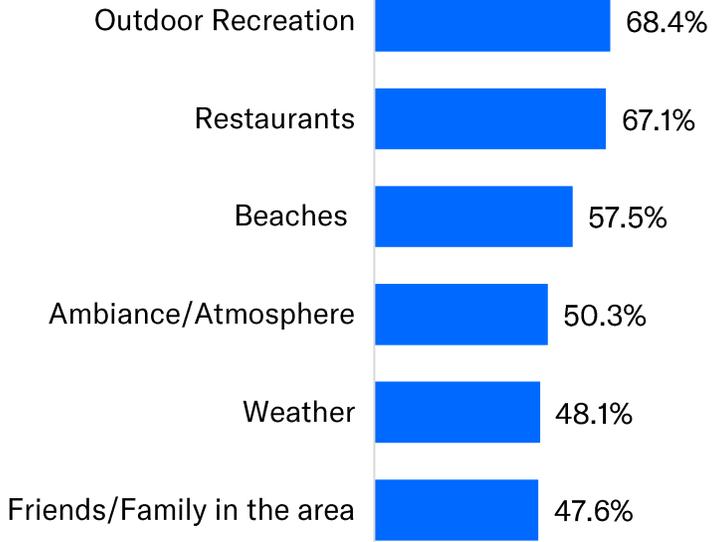
## Communities Visited



- St. Petersburg – 58.1%
- Clearwater Beach – 37.7%
- Madeira Beach – 32.0%
- Tarpon Springs – 26.0%
- Clearwater – 24.1%

# Key Insights: North County Communities Traveler

## Important Factors for Destination Selection



## Average Daily Spending Per Travel Party



**\$385**

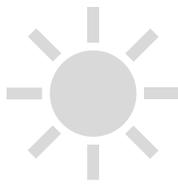
## Travel Party Size



**3.5**

29.7% traveled with children

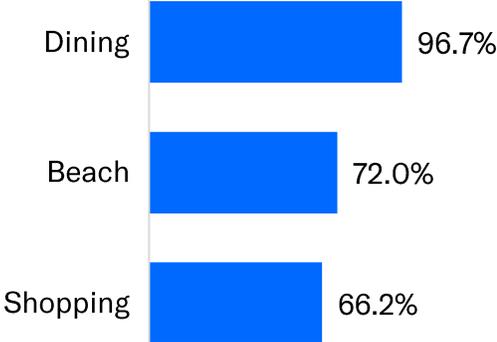
## Average Length of Stay: Overnight Visitors



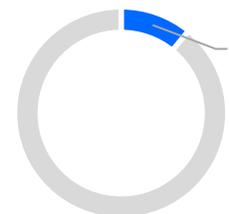
**5.6** days

**4.7** nights

## Top Activities



## International Visitation



International  
10.9%

## Origin States



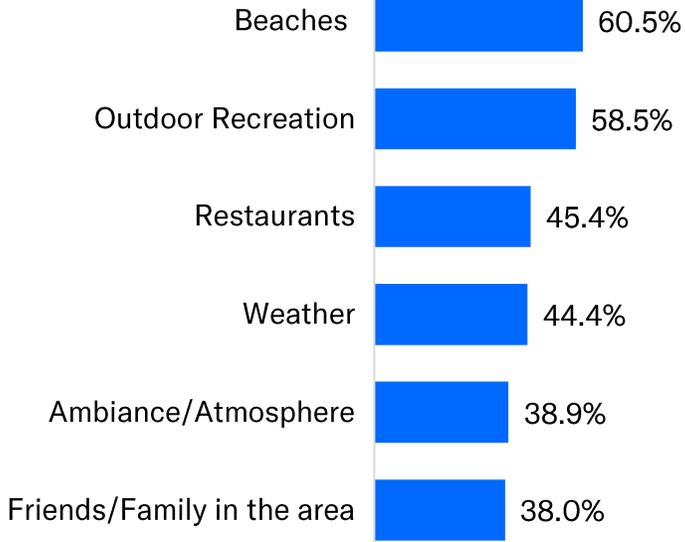
## Communities Visited



- Tarpon Springs – 76.4%
- Dunedin – 68.9%
- Clearwater Beach – 65.3%
- Clearwater – 44.0%
- St. Petersburg – 36.3%

# Key Insights: Greater Clearwater Beach Traveler

## Important Factors for Destination Selection



## Average Daily Spending Per Travel Party



**\$383**

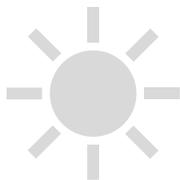
## Travel Party Size



**3.7**

33.1% traveled with children

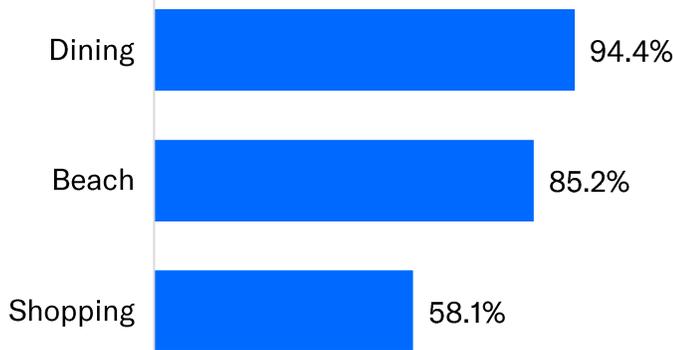
## Average Length of Stay: Overnight Visitors



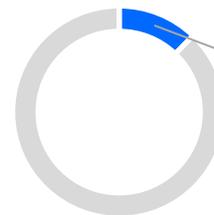
**5.4** days

**4.5** nights

## Top Activities



## International Visitation



International  
12.2%

## Origin States



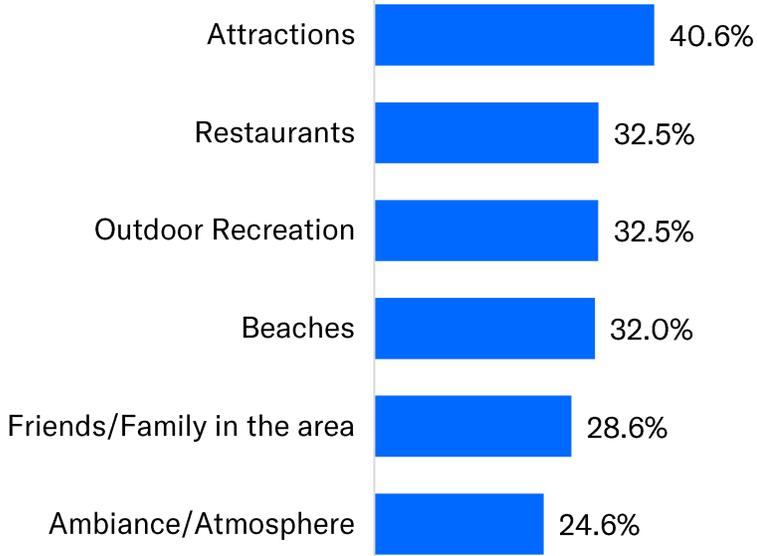
## Communities Visited



- Clearwater Beach – 82.7%
- Clearwater – 52.7%
- Tarpon Springs – 42.8%
- St. Petersburg – 41.9%
- Dunedin – 39.5%

# Key Insights: Greater St. Pete Traveler

## Important Factors for Destination Selection



## Average Daily Spending Per Travel Party



**\$316**

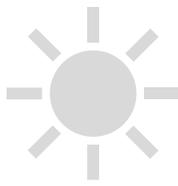
## Travel Party Size



**3.4**

19.9% traveled with children

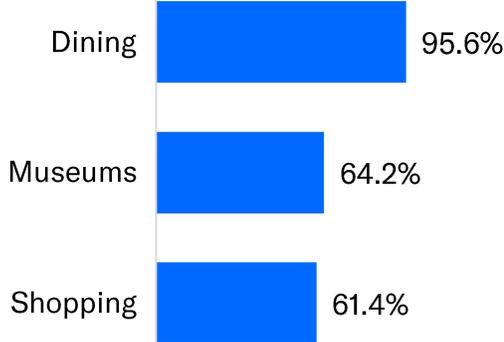
## Average Length of Stay: Overnight Visitors



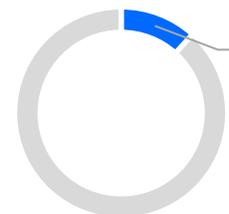
**5.1** days

**4.3** nights

## Top Activities



## International Visitation



International  
11.7%

## Origin States



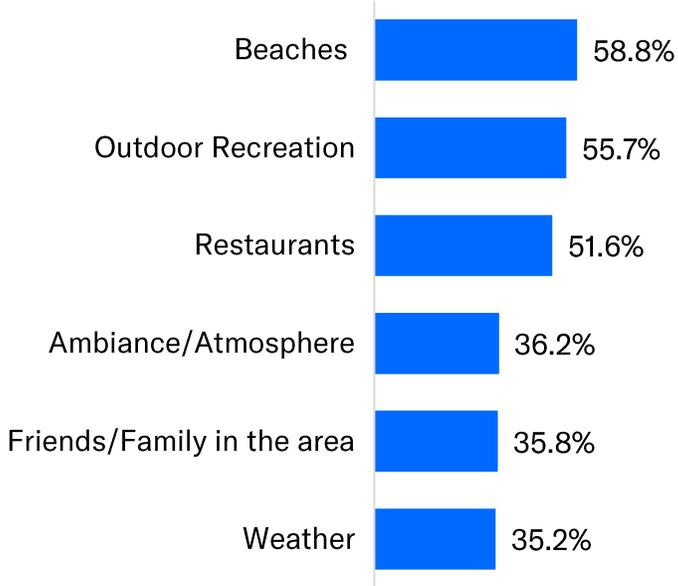
## Communities Visited



- St. Petersburg – 100%
- Madeira Beach – 28.4%
- Clearwater Beach – 23.4%
- Clearwater – 18.0%
- St. Pete Beach – 18.0%

# Key Insights: South County Beaches Traveler

## Important Factors for Destination Selection



## Average Daily Spending Per Travel Party



**\$364**

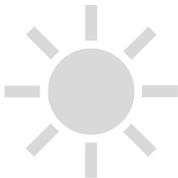
## Travel Party Size



**3.6**

30.0% traveled with children

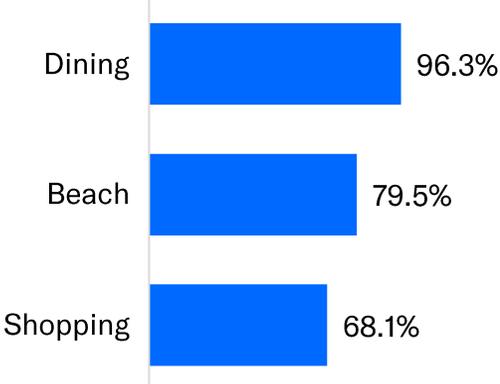
## Average Length of Stay: Overnight Visitors



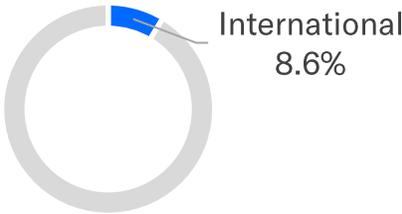
**5.6** days

**4.7** nights

## Top Activities



## International Visitation



## Origin States



## Communities Visited



- Madeira Beach – 86.8%
- St. Petersburg – 56.0%
- St. Pete Beach – 34.5%
- Clearwater Beach – 31.5%
- Tarpon Springs – 29.3%

# More Insights Ahead

- **Visitor Profile & Economic Impact** – including new online panel based surveys and pulse studies
- **Ad Effectiveness Research** –including heatmapping/eye tracking analysis
- **Brand Awareness Study** – including qualitative and gamified methodologies
- **Resident Sentiment Study** – including online community
- **National and Global Benchmarks** –*The State of the American Traveler, The State of the International Traveler and The Future of the Meetings Industry* studies

# Thank You!