



ST.PETE
CLEARWATER
FLORIDA

Economic Snapshot Report

December 2025 TDC Meeting - October 2025 Data

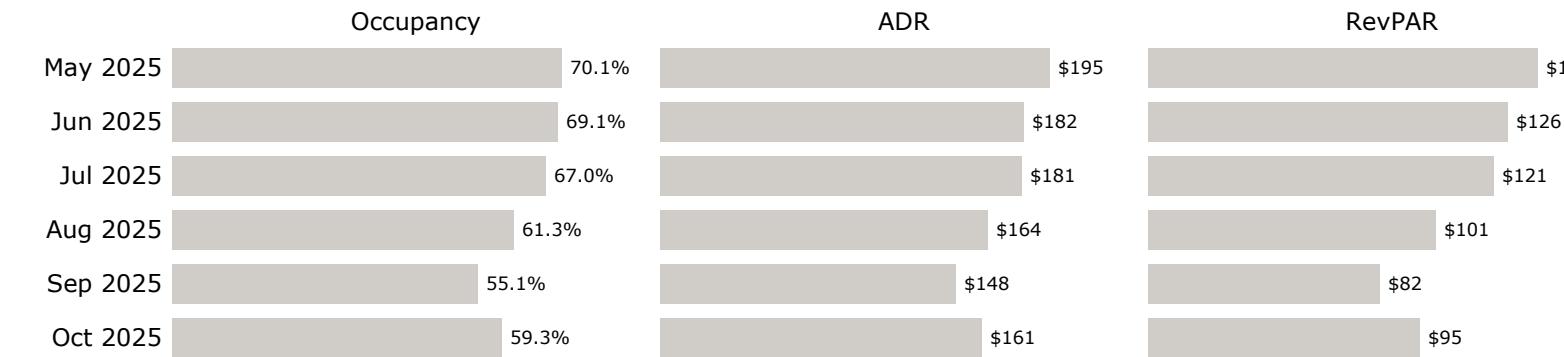
Hotel Performance Summary

Pinellas County, FL | October 2025



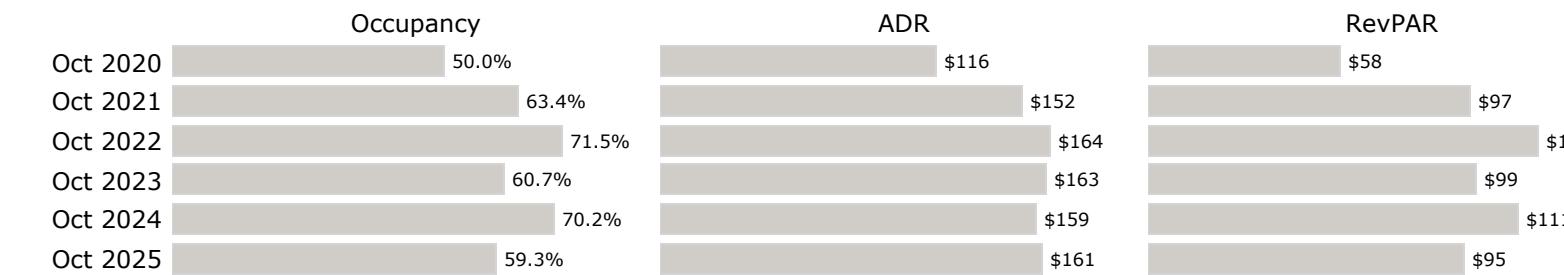
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
	59.3%	\$160.86	\$95.36	681.4K	403.9K	\$65.0M
Change vs. Previous Year	▼ -15.5%	▲ 1.5%	▼ -14.2%	▲ 5.2%	▼ -11.1%	▼ -9.8%
YTD <small>Fiscal Year</small>	59.3%	\$160.86	\$95.36	681.4K	403.9K	\$65.0M
YTD Change vs. Previous Year	▼ -15.5%	▲ 1.5%	▼ -14.2%	▲ 5.2%	▼ -11.1%	▼ -9.8%

Last Six Months Performance

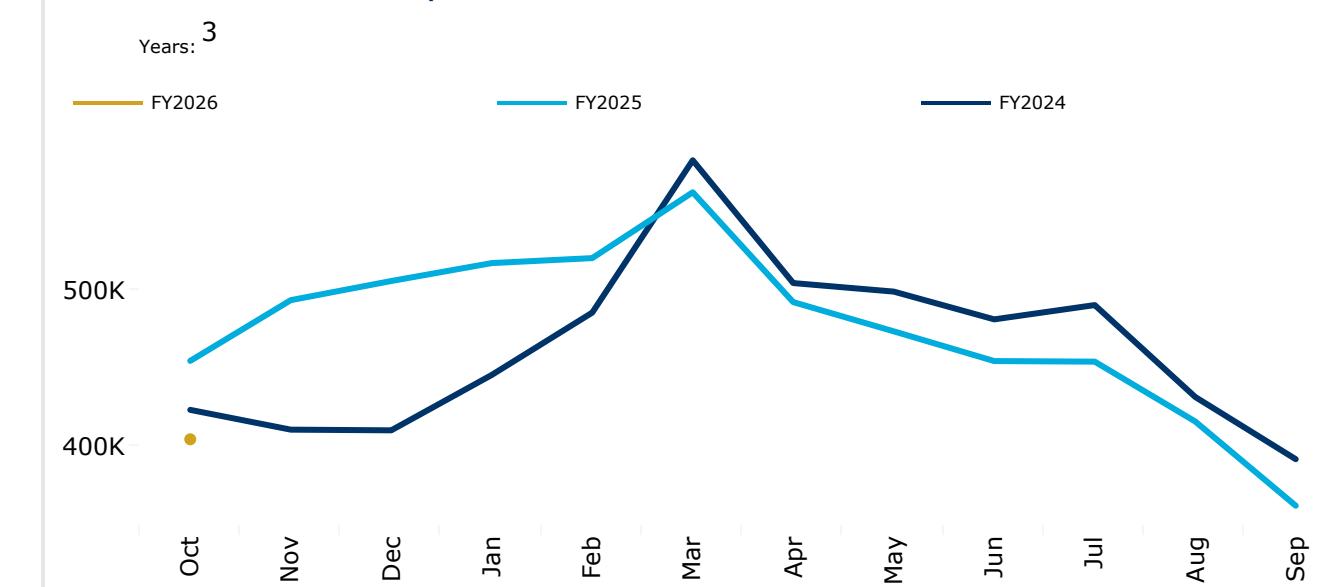


October Performance by Year

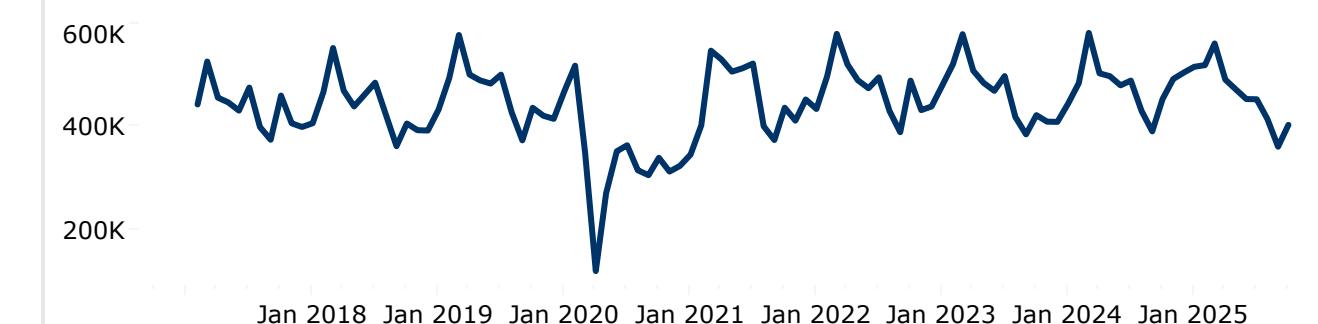
Pinellas County, FL



Demand YOY Comparison



Demand Long Term Trend



Submarkets Hotel Performance

Pinellas County, FL vs. Submarkets



October 2025, Submarket Hotel KPIs

Submarket	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
St. Pete Beach/ Terra V..	51.4%	\$230	\$118	60.4K	31.0K	\$7.2M
Clearwater Beach+	60.2%	\$226	\$136	127.9K	77.0K	\$17.4M
Beach+	57.1%	\$209	\$119	260.5K	148.6K	\$31.1M
Downtown St. Petersbu..	63.6%	\$186	\$118	49.8K	31.7K	\$5.9M
State of Florida	63.9%	\$175	\$112	15.7M	10.0M	\$1.8B
Treasure Island Beach+	55.9%	\$164	\$92	30.4K	17.0K	\$2.8M
Pinellas County, FL	59.3%	\$161	\$95	681.4K	403.9K	\$65.0M
Indian Rocks Beach/ In..	59.4%	\$157	\$93	49.0K	29.1K	\$4.6M
Dunedin+	64.8%	\$152	\$98	12.9K	8.3K	\$1.3M
Inland+	60.0%	\$121	\$73	331.1K	198.8K	\$24.0M
Tarpon Springs/ Oldsm..	59.6%	\$114	\$68	38.0K	22.7K	\$2.6M
St. Pete/ Largo/ Pinella..	60.9%	\$112	\$68	107.0K	65.2K	\$7.3M
Clearwater+	55.9%	\$100	\$50	107.0K	65.2K	\$7.3M

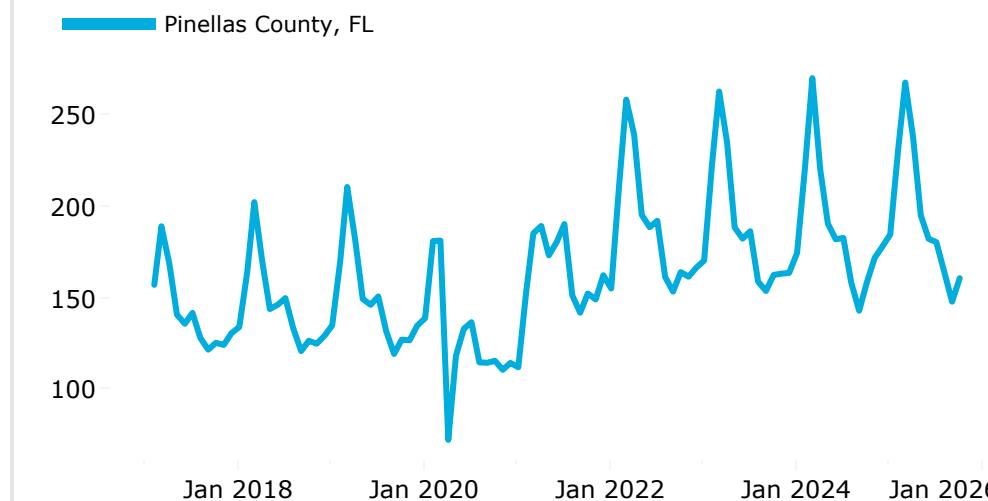
October 2025, Submarket Hotel Performance vs. Previous Year

	Occ	YOY	ADR	YOY	RevPAR	YOY	Total Supply	YOY	Rooms Sold	YOY	Room Revenue	YOY
Clearwater Beach+	60.2%	▲ 7.2%	\$226	▲ 1.1%	\$136	▲ 8.4%	127.9K	▲ 6.2%	77.0K	▲ 13.9%	\$17.4M	▲ 15.1%
Clearwater+	57.5%	▼ -27.6%	\$98	▼ -18.5%	\$56	▼ -41.0%	125.0K	▼ -4.5%	71.9K	▼ -30.8%	\$7.0M	▼ -43.6%
Downtown St. Petersburg+	63.6%	▲ 0.3%	\$186	▼ -2.1%	\$118	▼ -1.9%	49.8K	▼ -0.2%	31.7K	▲ 0.1%	\$5.9M	▼ -2.0%
Dunedin+	64.8%		\$152		\$98		12.9K		8.3K		\$1.3M	
Indian Rocks Beach/ Indian Shores/ Madeir..	59.4%	▼ -18.1%	\$157	▼ -5.3%	\$93	▼ -22.4%	49.0K	▼ -1.7%	29.1K	▼ -19.5%	\$4.6M	▼ -23.8%
Pinellas County, FL	59.3%	▼ -15.5%	\$161	▲ 1.5%	\$95	▼ -14.2%	681.4K	▲ 5.2%	403.9K	▼ -11.1%	\$65.0M	▼ -9.8%
St. Pete Beach/ Terra Verde+	51.4%	▲ 31.0%	\$230	▲ 34.7%	\$118	▲ 76.4%	60.4K	▲ 18.4%	31.0K	▲ 55.1%	\$7.2M	▲ 108.8%
St. Pete/ Largo/ Pinellas Park+	60.9%	▼ -28.0%	\$112	▼ -15.8%	\$68	▼ -39.4%	107.0K	▼ -0.6%	65.2K	▼ -28.4%	\$7.3M	▼ -39.7%
Tarpon Springs/ Oldsmar/ Palm Harbor..	59.6%	▼ -21.0%	\$114	▼ -23.4%	\$68	▼ -39.5%	38.0K	▼ -0.5%	22.7K	▼ -21.4%	\$2.6M	▼ -39.8%
Treasure Island Beach+	55.9%	▼ -15.5%	\$164	▼ -8.2%	\$92	▼ -22.4%	30.4K	▲ 24.2%	17.0K	▲ 4.9%	\$2.8M	▼ -3.7%

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

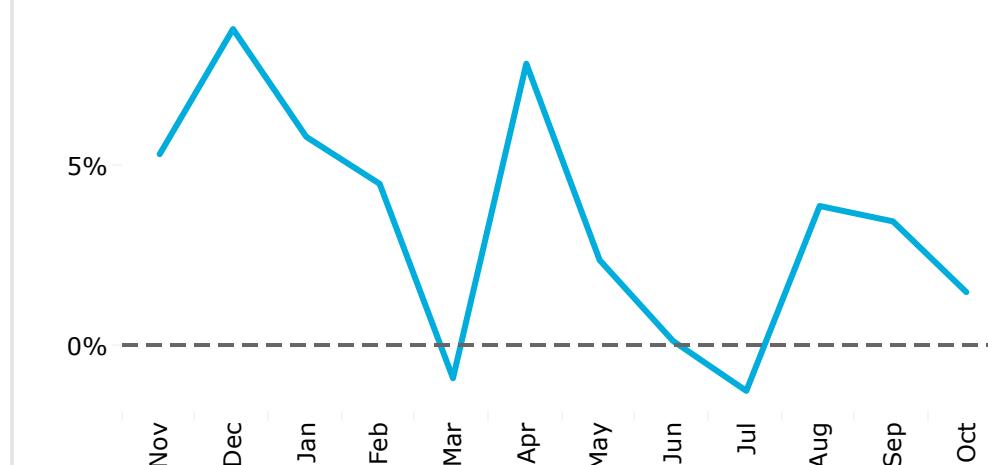
Source: STR

ADR Comparison



ADR vs. Same Month in Previous Year

Last 12 Months



Competitive Markets Hotel Performance

Pinellas County, FL vs. Comp. Markets



October 2025, Comp. Markets Hotel KPIs

Florida Keys	61.4%	\$276	\$169	333.4K	204.9K	\$56.5M
Palm Beach County, FL	65.7%	\$213	\$140	592.2K	389.3K	\$82.9M
Orlando	70.9%	\$204	\$145	4.5M	3.2M	\$650.8M
Miami/Hialeah, FL	66.9%	\$180	\$121	2.0M	1.3M	\$240.4M
State of Florida	63.9%	\$175	\$112	15.7M	10.0M	\$1.8B
Sarasota/Bradenton, FL	58.2%	\$171	\$100	390.7K	227.4K	\$39.0M
Naples, FL	58.0%	\$162	\$94	96.6K	56.0K	\$9.1M
Fort Lauderdale, FL	65.1%	\$161	\$105	1.2M	774.2K	\$124.6M
Pinellas County, FL	59.3%	\$161	\$95	681.4K	403.9K	\$65.0M
Hillsborough County, ..	66.5%	\$155	\$103	809.9K	538.5K	\$83.4M
Fort Myers, FL	54.1%	\$137	\$74	405.3K	219.4K	\$30.0M
Osceola County, FL	61.0%	\$135	\$82	818.6K	499.7K	\$67.3M
Bay County, FL	61.6%	\$126	\$78	343.3K	211.5K	\$26.6M

Occupancy ADR RevPAR Supply Rooms Sold Revenue

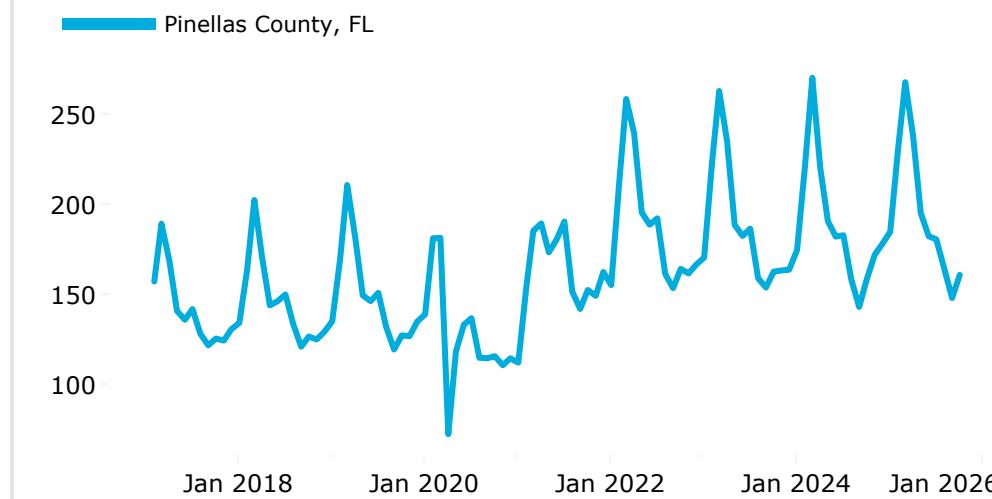
October 2025, Comp. Markets Hotel Performance vs. Previous Year

	Occ	YOY	ADR	YOY	RevPAR	YOY	Total Supply	YOY	Demand	YOY	Revenue	YOY
Bay County, FL	61.6%	▼ -6.1%	\$126	▲ 5.3%	\$78	▼ -1.1%	343.3K	▲ 0.3%	211.5K	▼ -5.8%	\$26.6M	▼ -0.9%
Florida Keys	61.4%	▲ 15.9%	\$276	▼ -3.5%	\$169	▲ 11.8%	333.4K	▲ 0.2%	204.9K	▲ 16.1%	\$56.5M	▲ 12.0%
Fort Lauderdale, FL	65.1%	▼ -4.1%	\$161	▼ -5.3%	\$105	▼ -9.2%	1.2M	▼ -1.6%	774.2K	▼ -5.7%	\$124.6M	▼ -10.7%
Fort Myers, FL	54.1%	▼ -12.6%	\$137	▲ 3.2%	\$74	▼ -9.9%	405.3K	▲ 13.5%	219.4K	▼ -0.9%	\$30.0M	▲ 2.3%
Hillsborough County..	66.5%	▼ -15.0%	\$155	▼ -6.8%	\$103	▼ -20.9%	809.9K	▲ 2.0%	538.5K	▼ -13.4%	\$83.4M	▼ -19.3%
Miami/Hialeah, FL	66.9%	▼ -2.7%	\$180	▼ -10.6%	\$121	▼ -13.0%	2.0M	▼ -1.8%	1.3M	▼ -4.4%	\$240.4M	▼ -14.5%
Naples, FL	58.0%	▲ 13.2%	\$162	▼ -12.5%	\$94	▼ -0.9%	96.6K	▲ 0.0%	56.0K	▲ 13.2%	\$9.1M	▼ -0.9%
Orlando	70.9%	▼ -0.3%	\$204	▲ 8.3%	\$145	▲ 7.9%	4.5M	▲ 0.8%	3.2M	▲ 0.4%	\$650.8M	▲ 8.8%
Osceola County, FL	61.0%	▼ -5.1%	\$135	▲ 6.9%	\$82	▲ 1.5%	818.6K	▼ -2.4%	499.7K	▼ -7.4%	\$67.3M	▼ -1.0%
Palm Beach County,..	65.7%	▼ -0.6%	\$213	▲ 8.8%	\$140	▲ 8.1%	592.2K	▲ 0.1%	389.3K	▼ -0.6%	\$82.9M	▲ 8.2%
Pinellas County, FL	59.3%	▼ -15.5%	\$161	▲ 1.5%	\$95	▼ -14.2%	681.4K	▲ 5.2%	403.9K	▼ -11.1%	\$65.0M	▼ -9.8%
Sarasota/Bradenton..	58.2%	▼ -21.8%	\$171	▲ 4.7%	\$100	▼ -18.2%	390.7K	▲ 1.4%	227.4K	▼ -20.7%	\$39.0M	▼ -17.0%
State of Florida	63.9%	▼ -6.5%	\$175	▲ 2.5%	\$112	▼ -4.1%	15.7M	▲ 1.1%	10.0M	▼ -5.4%	\$1.8B	▼ -3.0%

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

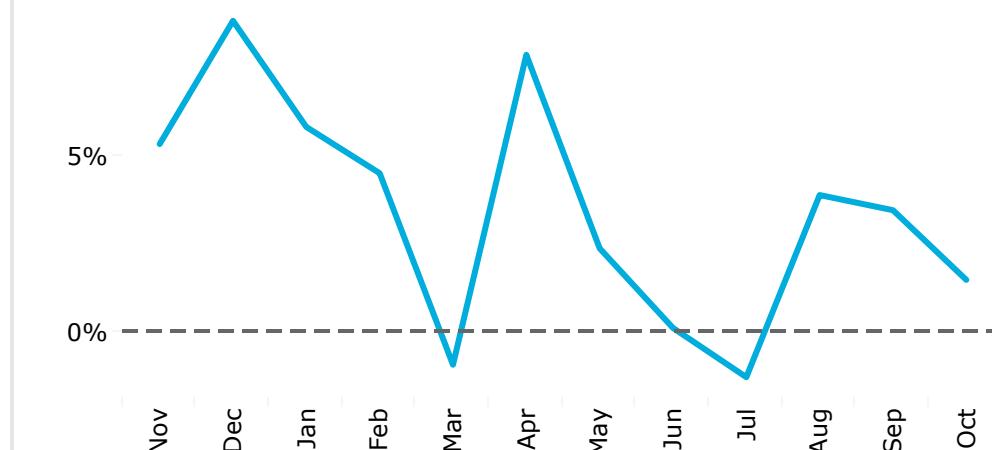
Source: STR

ADR Comparison



ADR vs. Same Month in Previous Year

Last 12 Months





Pinellas County Tourist Development Tax Collections

October 2025



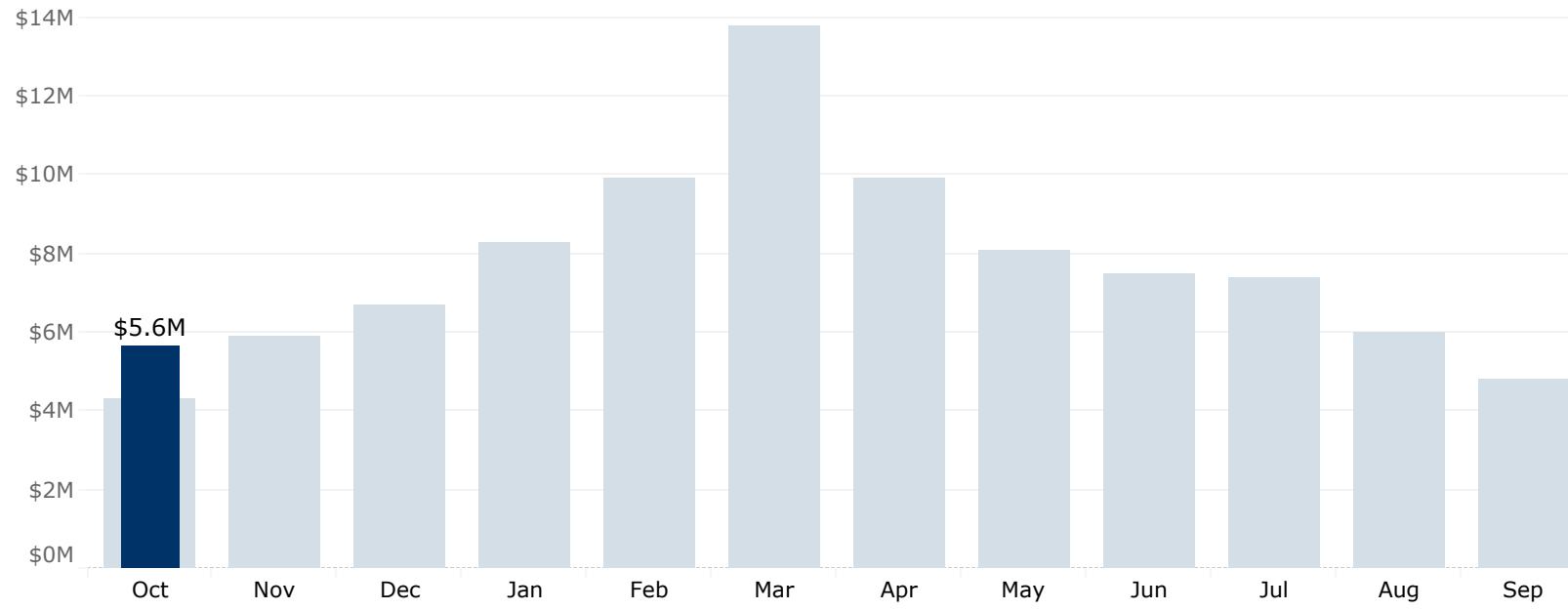
Tourist Development Tax Collections
\$5.6M
+30.4% YOY | +38.2% vs. 2019
Gross Tax Collected

Tourist Development Tax Collections by Month

Fiscal Year 2026

Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
\$5.6M											
+30.4%											

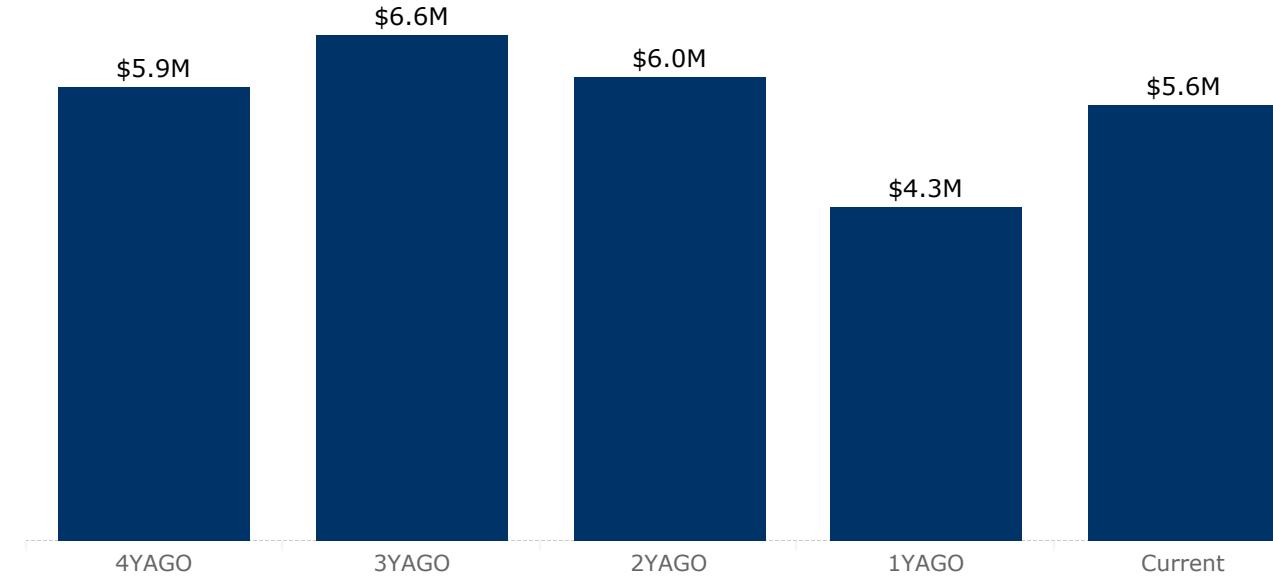
Current Last Year



Source: Pinellas County Tax Collector

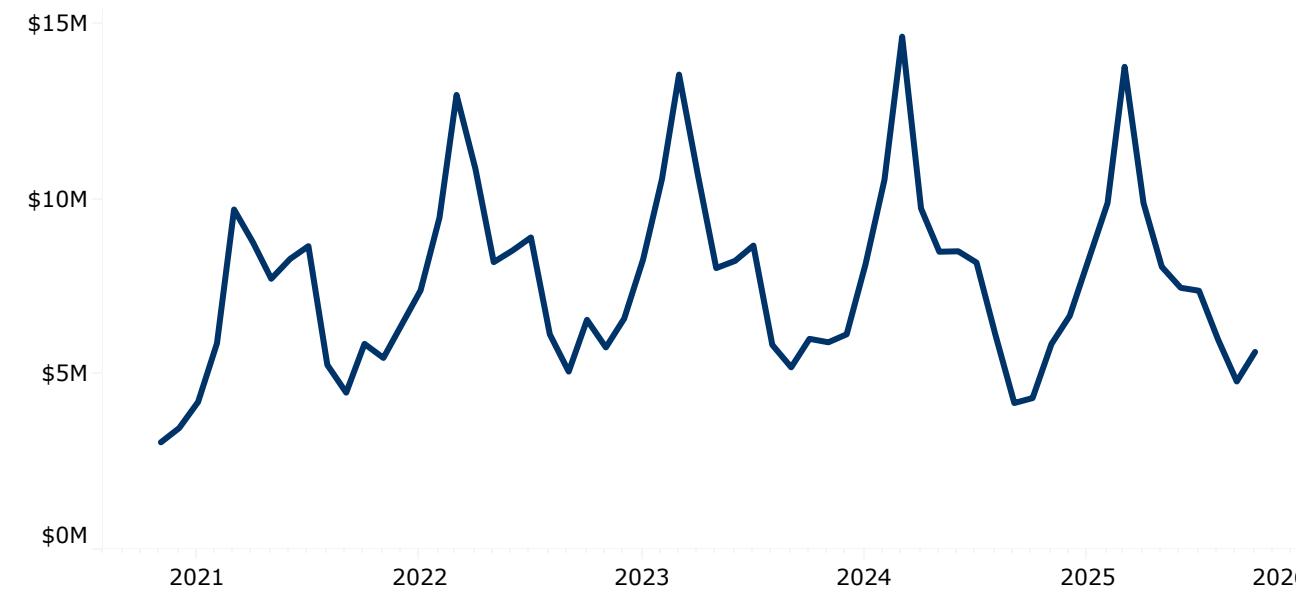
Tourist Development Tax Collections

October 2025 vs. comparable months over the past 5 years



Tourist Development Tax Collections

Long Term Trend



Powered by **SYMPHONY** | TOURISM ECONOMICS

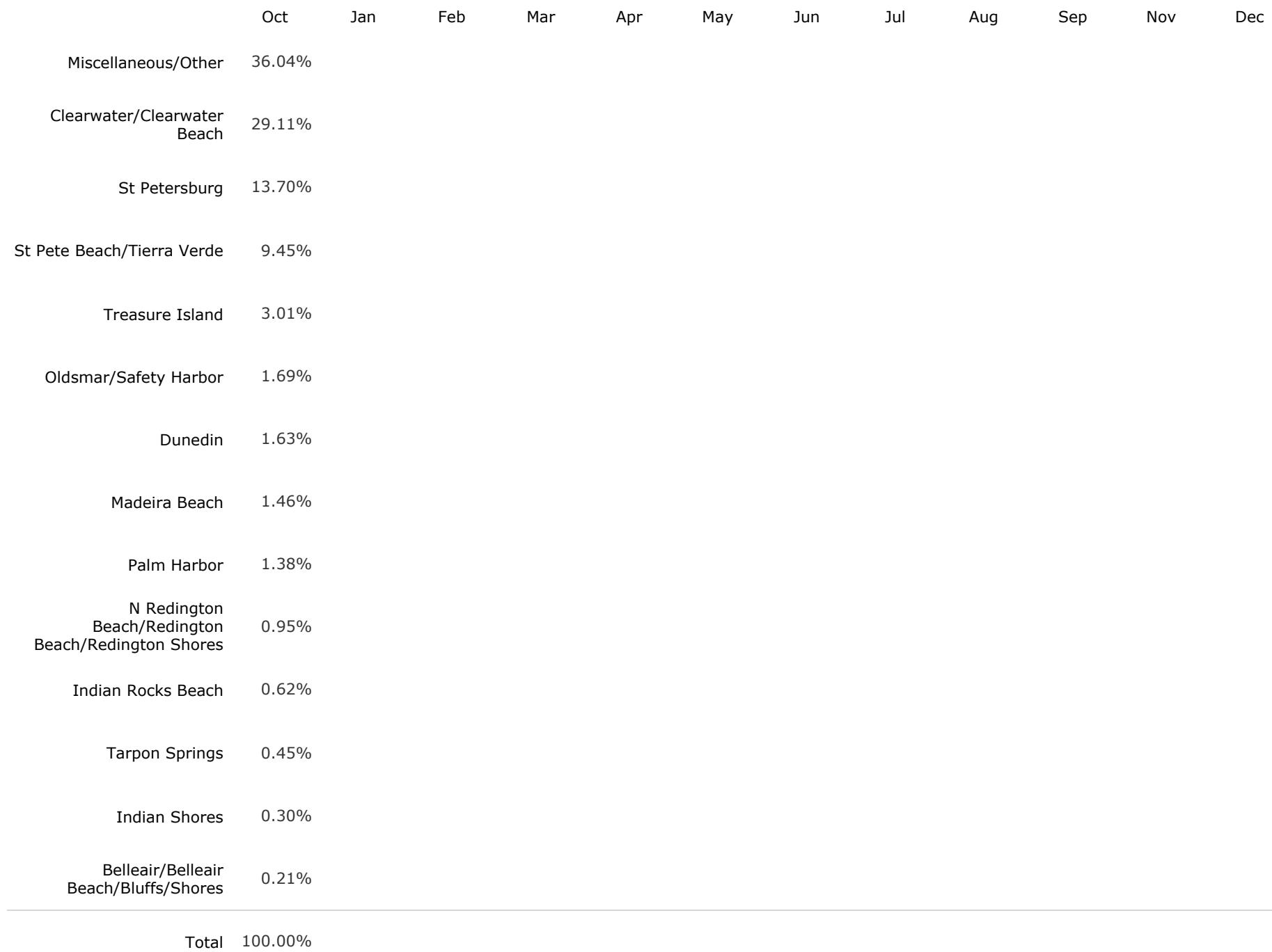


Pinellas County Local Option Tax Collections

October 2025

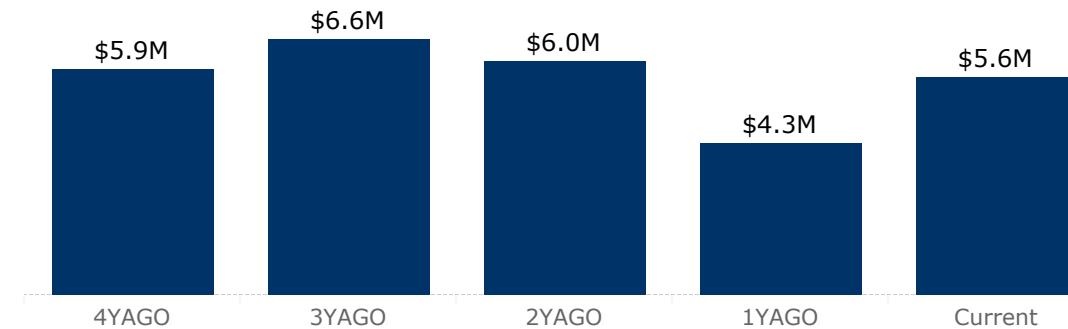


Local Option Tax Share of Total Collections



Tourist Development Tax Collections

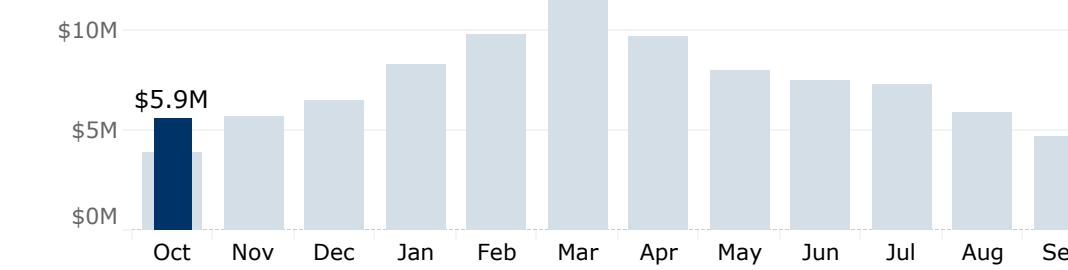
October 2025 vs. comparable months over the past 5 years



Tourist Development Tax Collections by Month

Fiscal Year 2026

Current YTD STLY YTD



Tourist Development Tax Collections

Long Term Trend

