



ST.PETE
CLEARWATER
FLORIDA

Economic Snapshot Report

December 2025 TDC Meeting - October 2025 Data

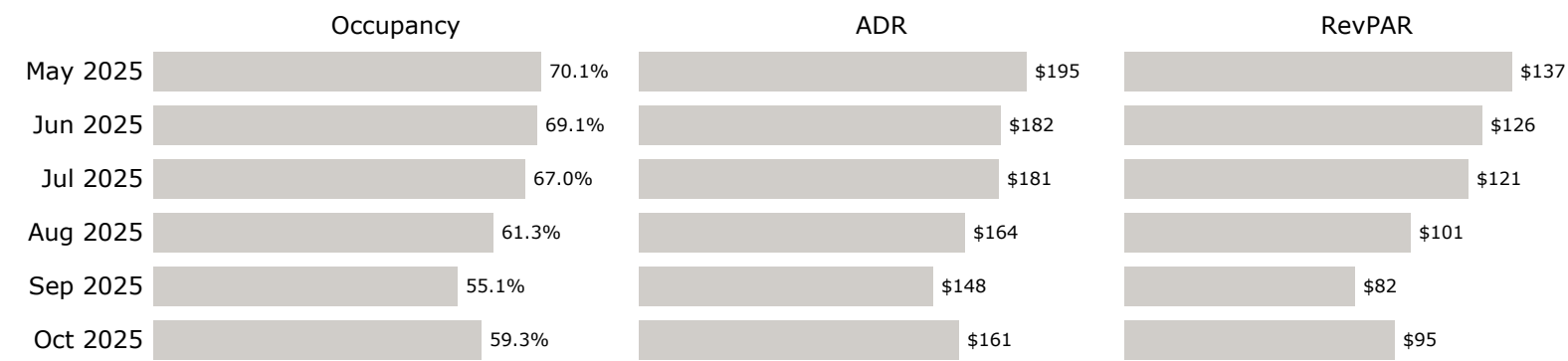
Hotel Performance Summary

Pinellas County, FL | October 2025



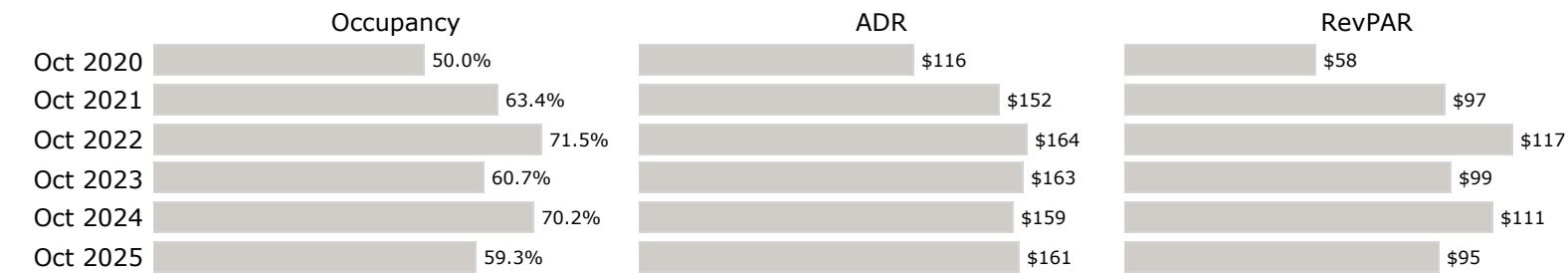
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
	59.3%	\$160.86	\$95.36	681.4K	403.9K	\$65.0M
Change vs. Previous Year	▼ -15.5%	▲ 1.5%	▼ -14.2%	▲ 5.2%	▼ -11.1%	▼ -9.8%
YTD Fiscal Year	59.3%	\$160.86	\$95.36	681.4K	403.9K	\$65.0M
YTD Change vs. Previous Year	▼ -15.5%	▲ 1.5%	▼ -14.2%	▲ 5.2%	▼ -11.1%	▼ -9.8%

Last Six Months Performance

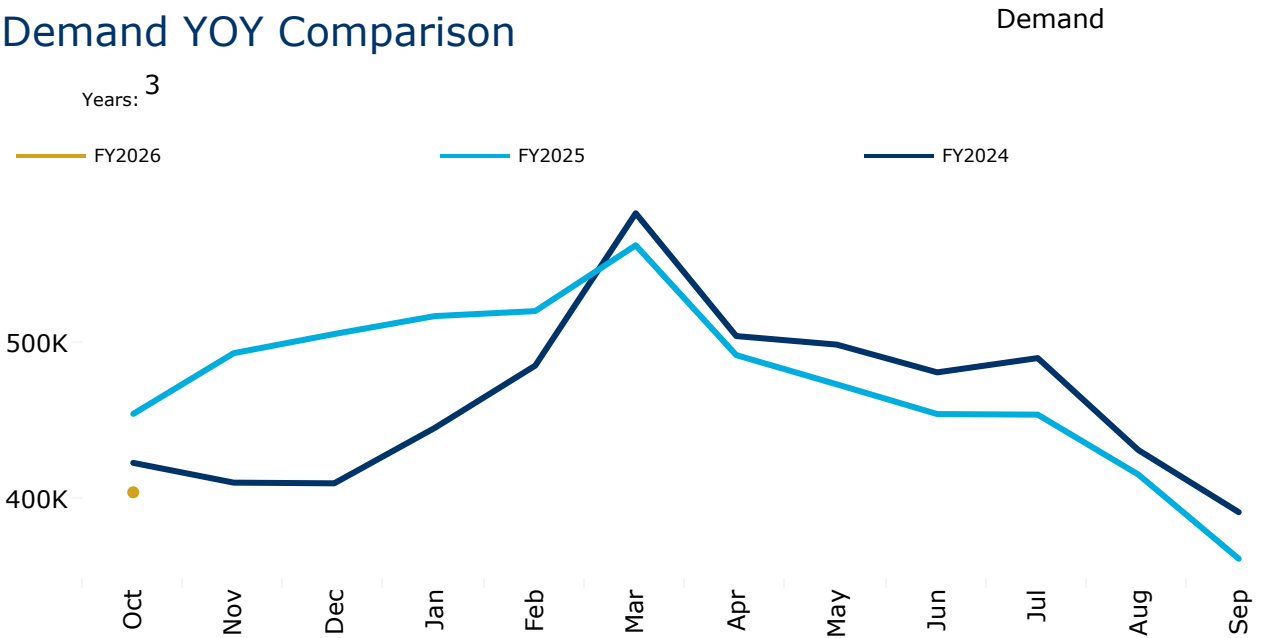


October Performance by Year

Pinellas County, FL



Demand YOY Comparison



Demand Long Term Trend

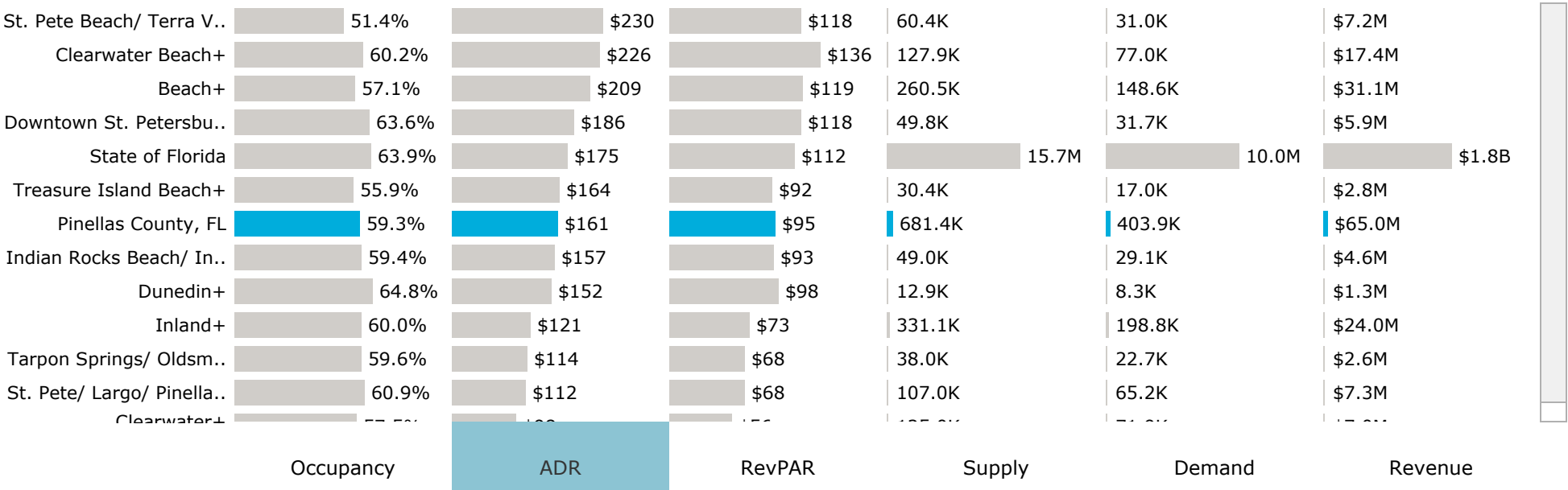


Submarkets Hotel Performance

Pinellas County, FL vs. Submarkets



October 2025, Submarket Hotel KPIs



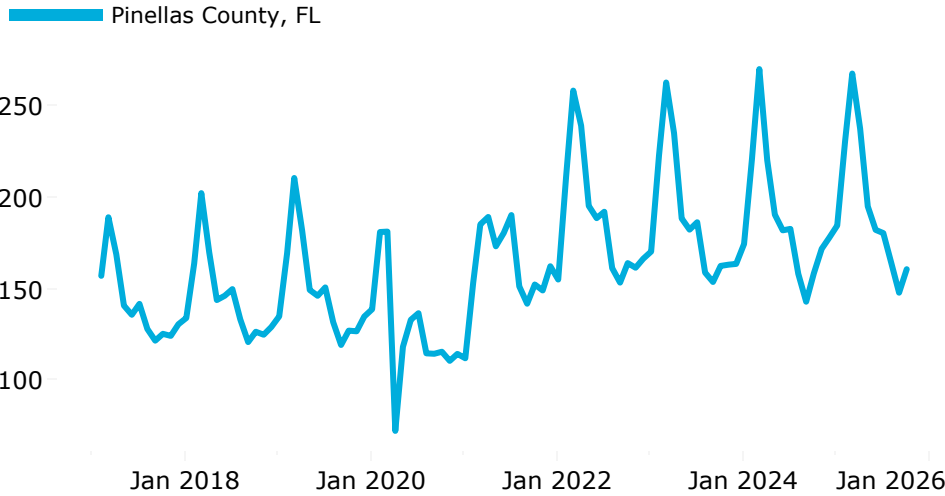
October 2025, Submarket Hotel Performance vs. Previous Year

	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%

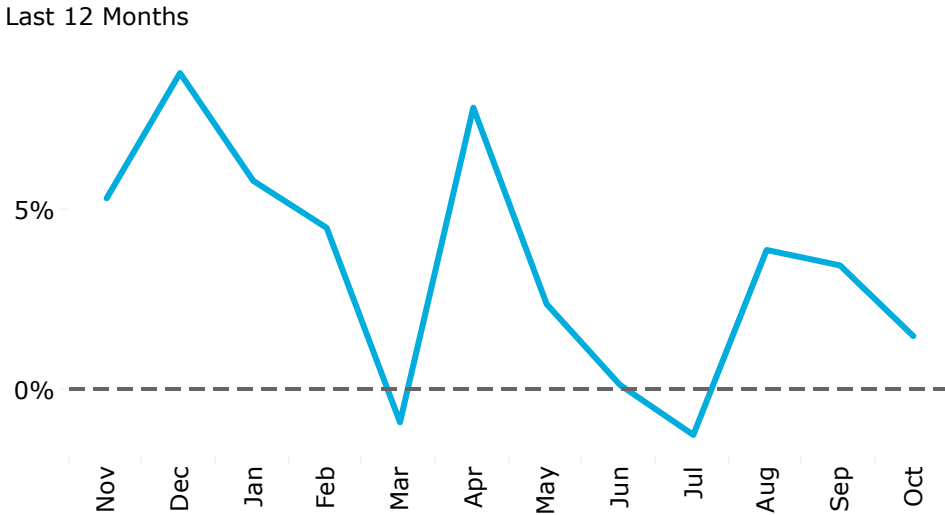
History for submarkets varies. Click on a submarket to check its history in the line charts

Source: STR

ADR Comparison



ADR vs. Same Month in Previous Year



Competitive Markets Hotel Performance

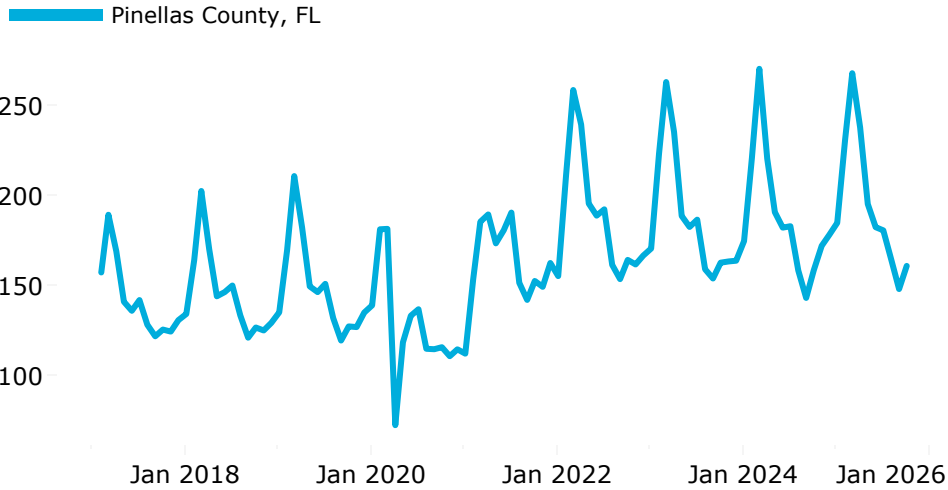
Pinellas County, FL vs. Comp. Markets



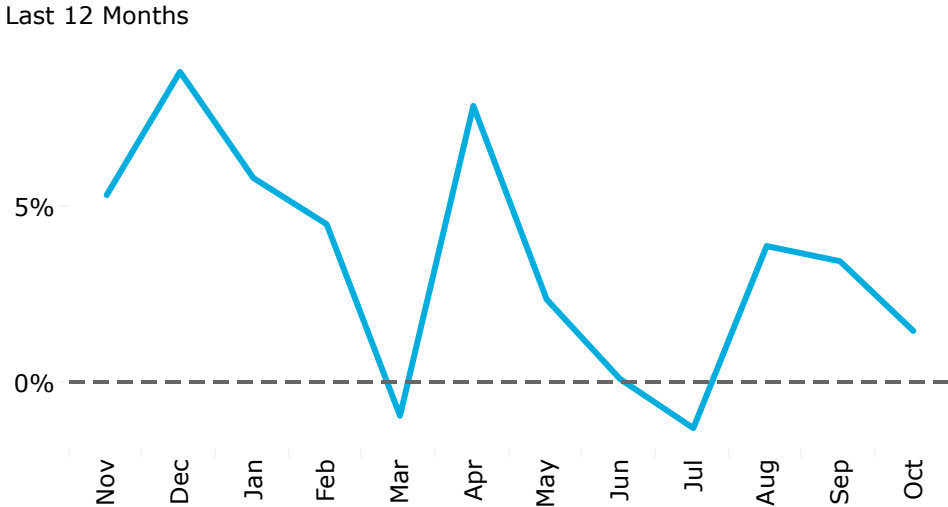
October 2025, Comp. Markets Hotel KPIs

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

ADR Comparison



ADR vs. Same Month in Previous Year



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



Pinellas County Tourist Development Tax Collections

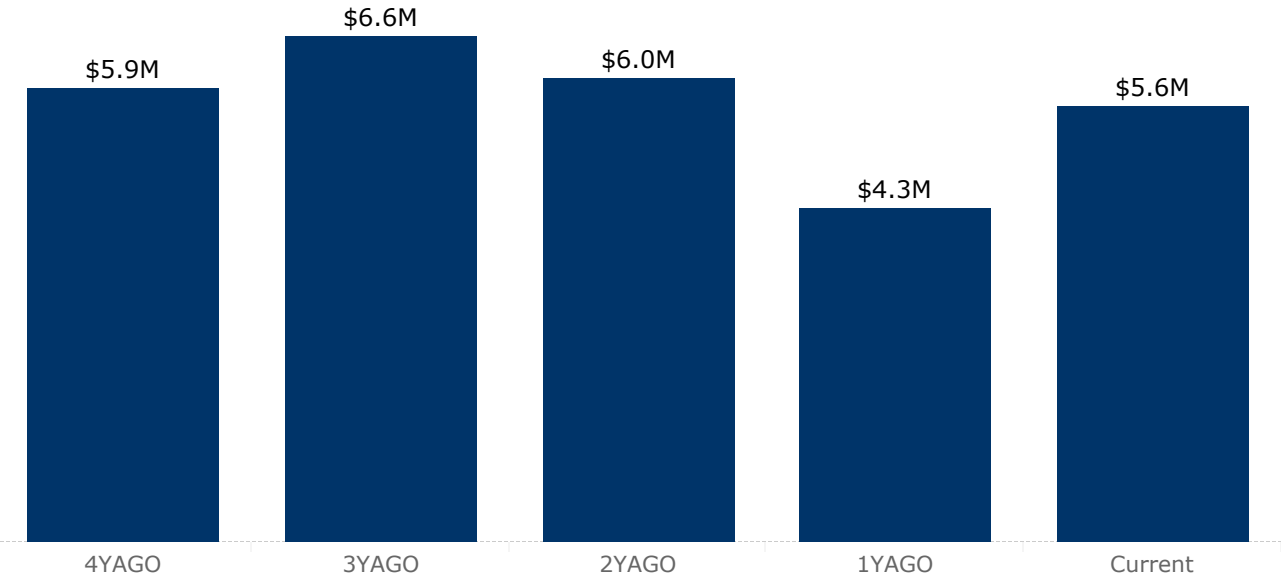
October 2025



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

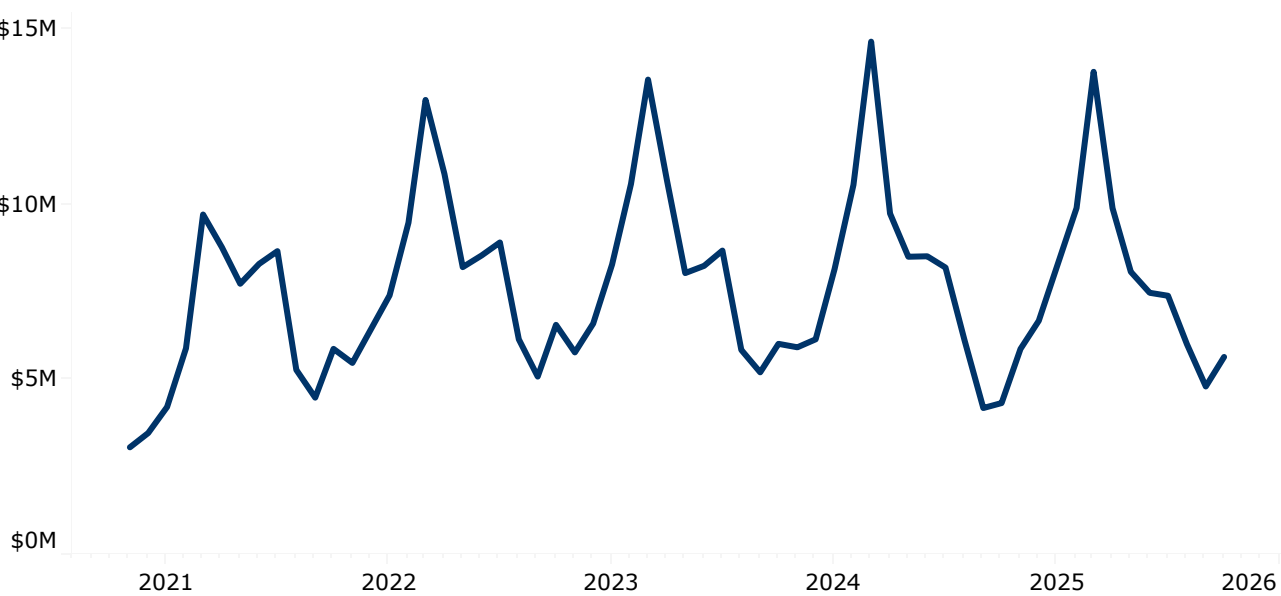
Tourist Development Tax Collections

October 2025 vs. comparable months over the past 5 years



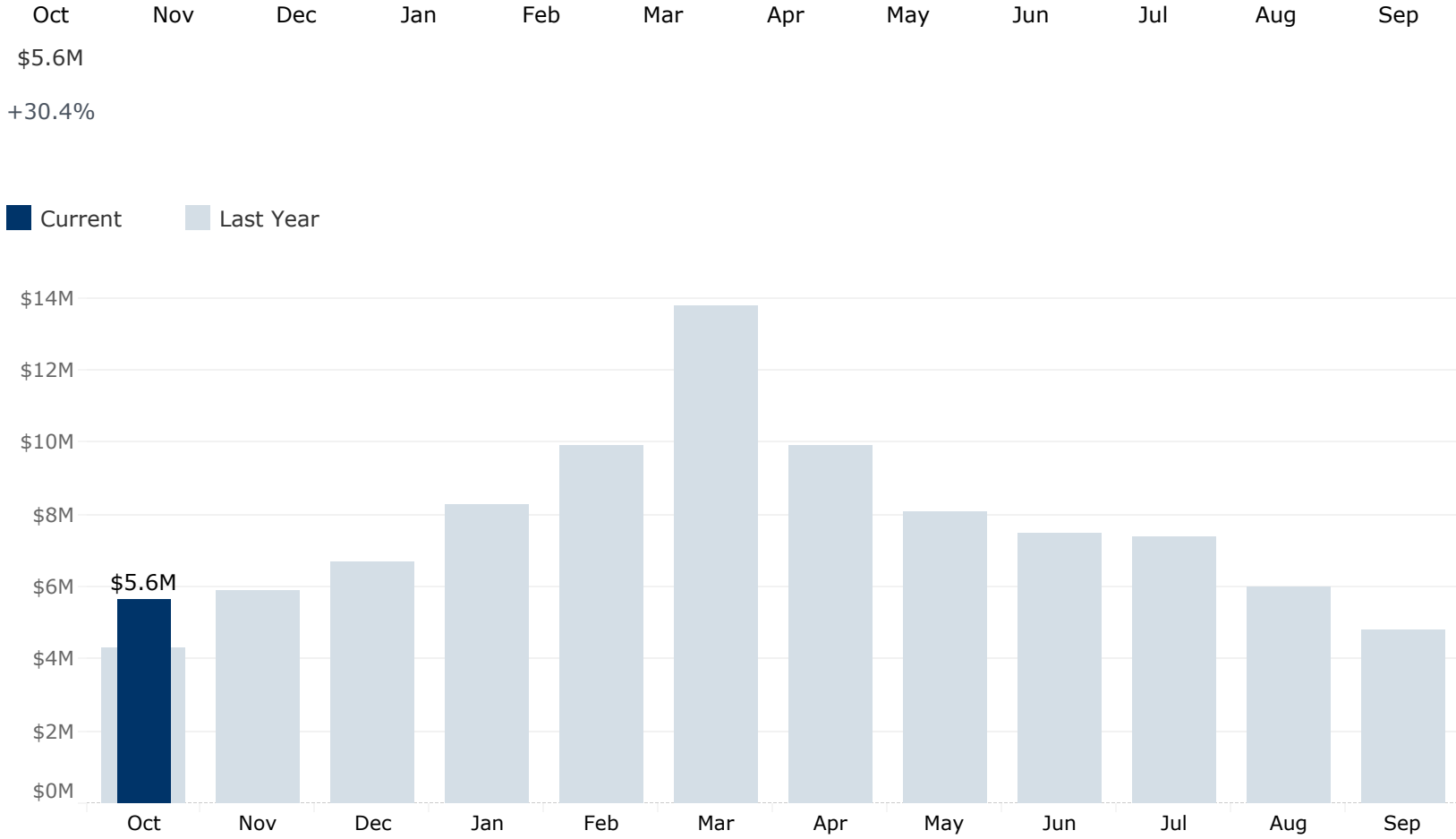
Tourist Development Tax Collections

Long Term Trend



Tourist Development Tax Collections by Month

Fiscal Year 2026





Pinellas County Local Option Tax Collections

October 2025



Local Option Tax Share of Total Collections

	Oct	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Nov	Dec
Miscellaneous/Other	36.04%											
Clearwater/Clearwater Beach	29.11%											
St Petersburg	13.70%											
St Pete Beach/Tierra Verde	9.45%											
Treasure Island	3.01%											
Oldsmar/Safety Harbor	1.69%											
Dunedin	1.63%											
Madeira Beach	1.46%											
Palm Harbor	1.38%											
N Redington Beach/Redington Beach/Redington Shores	0.95%											
Indian Rocks Beach	0.62%											
Tarpon Springs	0.45%											
Indian Shores	0.30%											
Belleair/Belleair Beach/Bluffs/Shores	0.21%											
Total	100.00%											

Source: Pinellas County Tax Collector

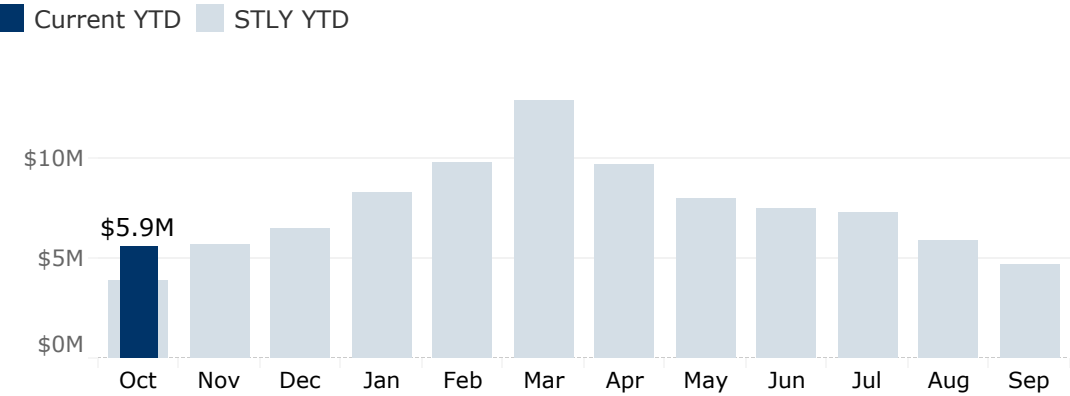
Tourist Development Tax Collections

October 2025 vs. comparable months over the past 5 years



Tourist Development Tax Collections by Month

Fiscal Year 2026



Tourist Development Tax Collections

Long Term Trend

