



ST.PETE
CLEARWATER
FLORIDA

Economic Snapshot Report

January 2026 TDC Meeting - November 2025 Data

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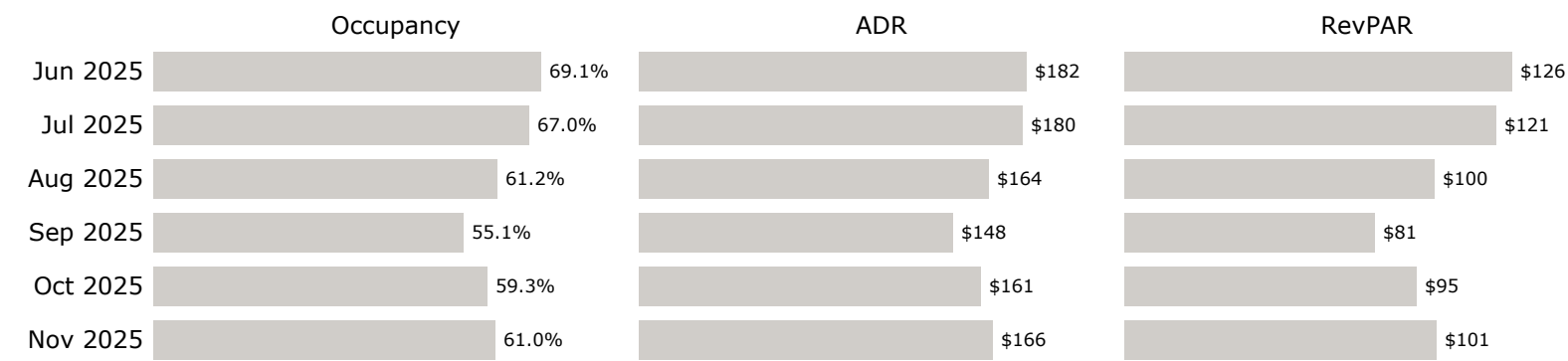
Hotel Performance Summary

Pinellas County, FL | November 2025



	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
	61.0%	\$165.97	\$101.29	659.3K	402.4K	\$66.8M
Change vs. Previous Year	▼ -21.8%	▼ -3.5%	▼ -24.5%	▲ 4.3%	▼ -18.4%	▼ -21.3%
YTD Fiscal Year	60.2%	\$163.26	\$98.21	1.3M	806.5K	\$131.7M
YTD Change vs. Previous Year	▼ -18.8%	▼ -1.4%	▼ -19.9%	▲ 4.8%	▼ -14.9%	▼ -16.1%

Last Six Months Performance

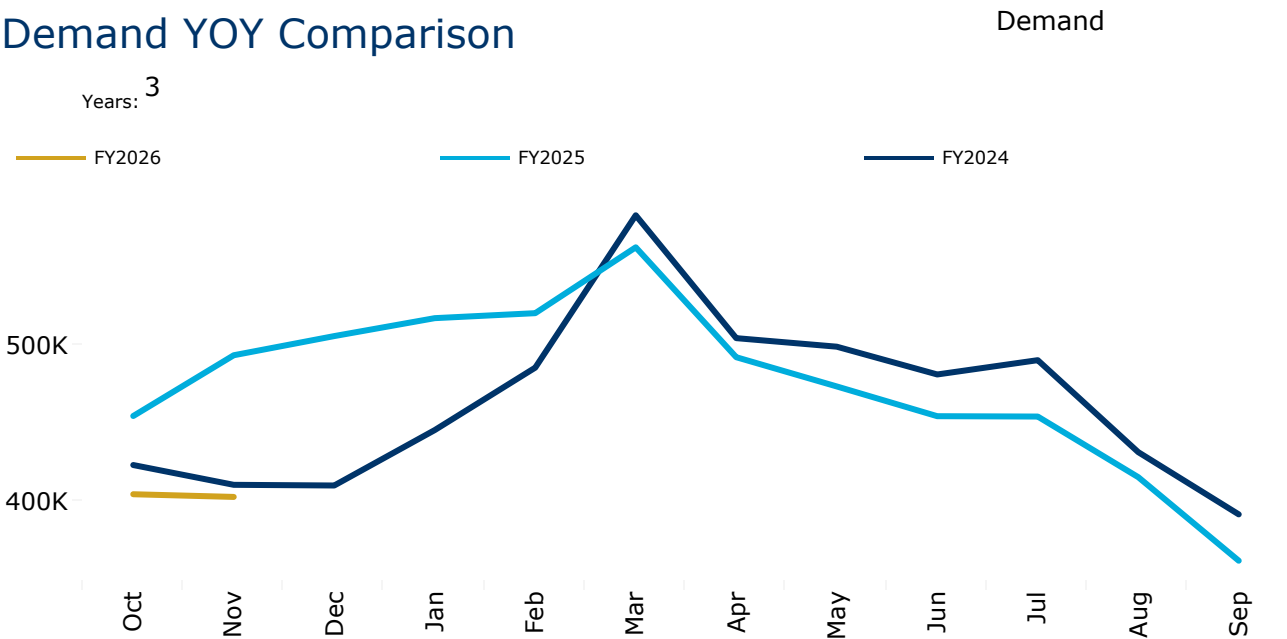


November Performance by Year

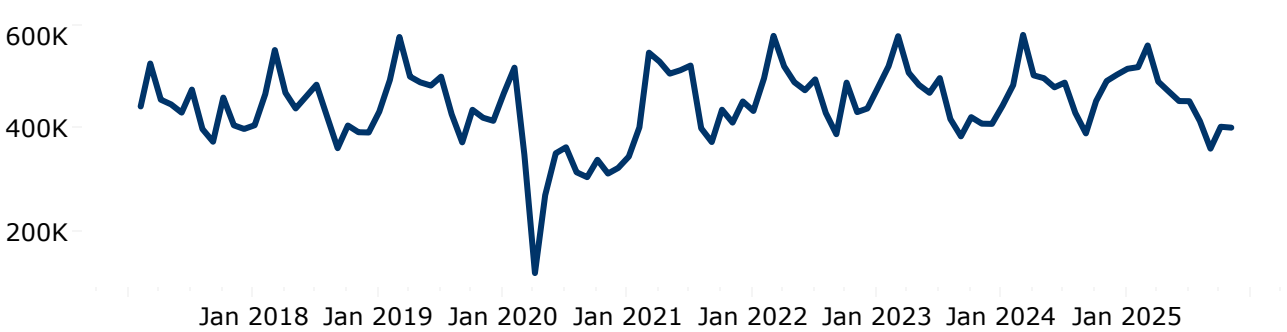
Pinellas County, FL



Demand YOY Comparison



Demand Long Term Trend



Submarkets Hotel Performance

Pinellas County, FL vs. Submarkets



November 2025, Submarket Hotel KPIs

St. Pete Beach/ Terra V..	<div><div></div></div> 54.7%	<div><div></div></div> \$232	<div><div></div></div> \$127	58.5K	32.0K	\$7.4M
Clearwater Beach+	<div><div></div></div> 60.1%	<div><div></div></div> \$226	<div><div></div></div> \$136	123.8K	74.4K	\$16.8M
Downtown St. Petersbu..	<div><div></div></div> 66.7%	<div><div></div></div> \$219	<div><div></div></div> \$146	48.2K	32.1K	\$7.0M
Beach+	<div><div></div></div> 57.8%	<div><div></div></div> \$209	<div><div></div></div> \$121	252.0K	145.7K	\$30.4M
State of Florida	<div><div></div></div> 65.8%	<div><div></div></div> \$180	<div><div></div></div> \$119	15.2M	10.0M	\$1.8B
Pinellas County, FL	<div><div></div></div> 61.0%	<div><div></div></div> \$166	<div><div></div></div> \$101	659.3K	402.4K	\$66.8M
Treasure Island Beach+	<div><div></div></div> 57.0%	<div><div></div></div> \$162	<div><div></div></div> \$92	29.4K	16.8K	\$2.7M
Indian Rocks Beach/ In..	<div><div></div></div> 58.0%	<div><div></div></div> \$155	<div><div></div></div> \$90	47.3K	27.5K	\$4.3M
Dunedin+	<div><div></div></div> 69.9%	<div><div></div></div> \$152	<div><div></div></div> \$106	12.5K	8.7K	\$1.3M
Inland+	<div><div></div></div> 62.3%	<div><div></div></div> \$129	<div><div></div></div> \$80	320.4K	199.7K	\$25.8M
Tarpon Springs/ Oldsm..	<div><div></div></div> 61.0%	<div><div></div></div> \$119	<div><div></div></div> \$73	36.8K	22.5K	\$2.7M
St. Pete/ Largo/ Pinella..	<div><div></div></div> 61.8%	<div><div></div></div> \$116	<div><div></div></div> \$72	103.5K	64.0K	\$7.5M
Clearwater+	<div><div></div></div> 60.7%	<div><div></div></div> \$100	<div><div></div></div> \$61	121.0K	73.4K	\$7.4M
Occupancy		ADR	RevPAR	Supply	Demand	Revenue

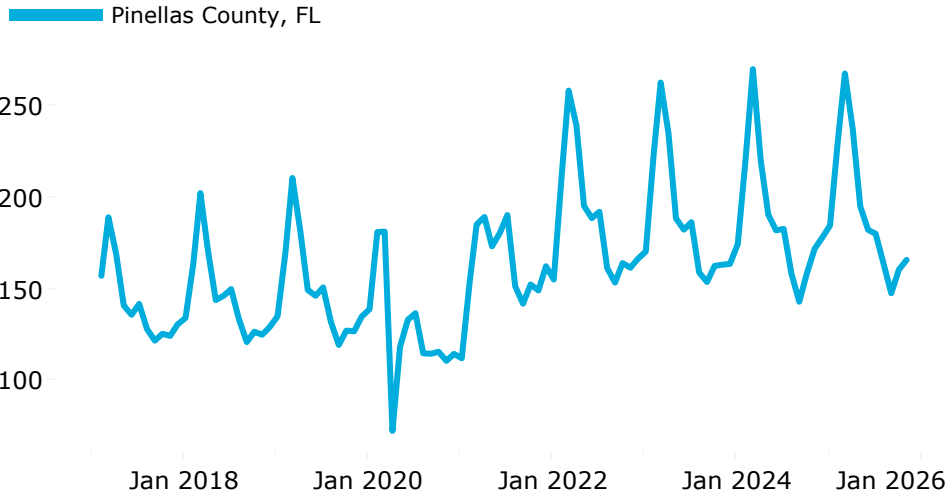
November 2025, Submarket Hotel Performance vs. Previous Year

	Occ	YOY	ADR	YOY	RevPAR	YOY	Total Supply	YOY	Rooms Sold	YOY	Room Revenue	YOY
Clearwater Beach+	60.1%	▼ -11.5%	\$226	▲ 0.2%	\$136	▼ -11.4%	123.8K	▲ 0.7%	74.4K	▼ -10.9%	\$16.8M	▼ -10.7%
Clearwater+	60.7%	▼ -29.9%	\$100	▼ -26.1%	\$61	▼ -48.2%	121.0K	▼ -4.5%	73.4K	▼ -33.0%	\$7.4M	▼ -50.5%
Downtown St. Petersburg+	66.7%	▼ -11.4%	\$219	▲ 4.6%	\$146	▼ -7.3%	48.2K	▼ -0.2%	32.1K	▼ -11.6%	\$7.0M	▼ -7.5%
Dunedin+	69.9%		\$152		\$106		12.5K		8.7K		\$1.3M	
Indian Rocks Beach/ Indian Shores/ Madeir..	58.0%	▼ -30.0%	\$155	▼ -12.7%	\$90	▼ -39.0%	47.3K	▼ -0.2%	27.5K	▼ -30.2%	\$4.3M	▼ -39.1%
Pinellas County, FL	61.0%	▼ -21.8%	\$166	▼ -3.5%	\$101	▼ -24.5%	659.3K	▲ 4.3%	402.4K	▼ -18.4%	\$66.8M	▼ -21.3%
St. Pete Beach/ Terra Verde+	54.7%	▲ 12.6%	\$232	▲ 25.2%	\$127	▲ 40.9%	58.5K	▲ 14.6%	32.0K	▲ 29.0%	\$7.4M	▲ 61.4%
St. Pete/ Largo/ Pinellas Park+	61.8%	▼ -31.2%	\$116	▼ -19.1%	\$72	▼ -44.4%	103.5K	▼ -0.6%	64.0K	▼ -31.6%	\$7.5M	▼ -44.7%
Tarpon Springs/ Oldsmar/ Palm Harbor..	61.0%	▼ -21.1%	\$119	▼ -25.1%	\$73	▼ -40.9%	36.8K	▼ -0.5%	22.5K	▼ -21.5%	\$2.7M	▼ -41.2%
Treasure Island Beach+	57.0%	▼ -25.2%	\$162	▼ -13.3%	\$92	▼ -35.2%	29.4K	▲ 29.5%	16.8K	▼ -3.2%	\$2.7M	▼ -16.1%

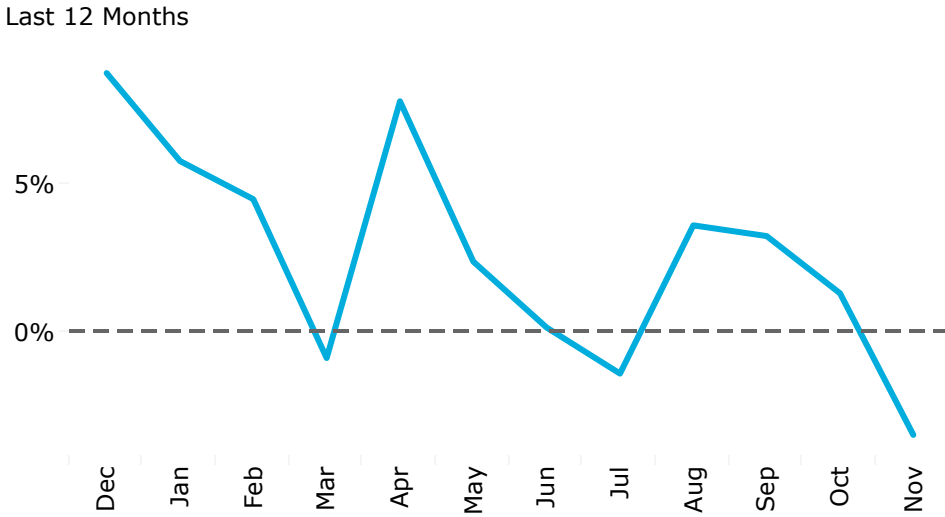
History for submarkets varies. Click on a submarket to check its history in the line charts

Source: STR

ADR Comparison



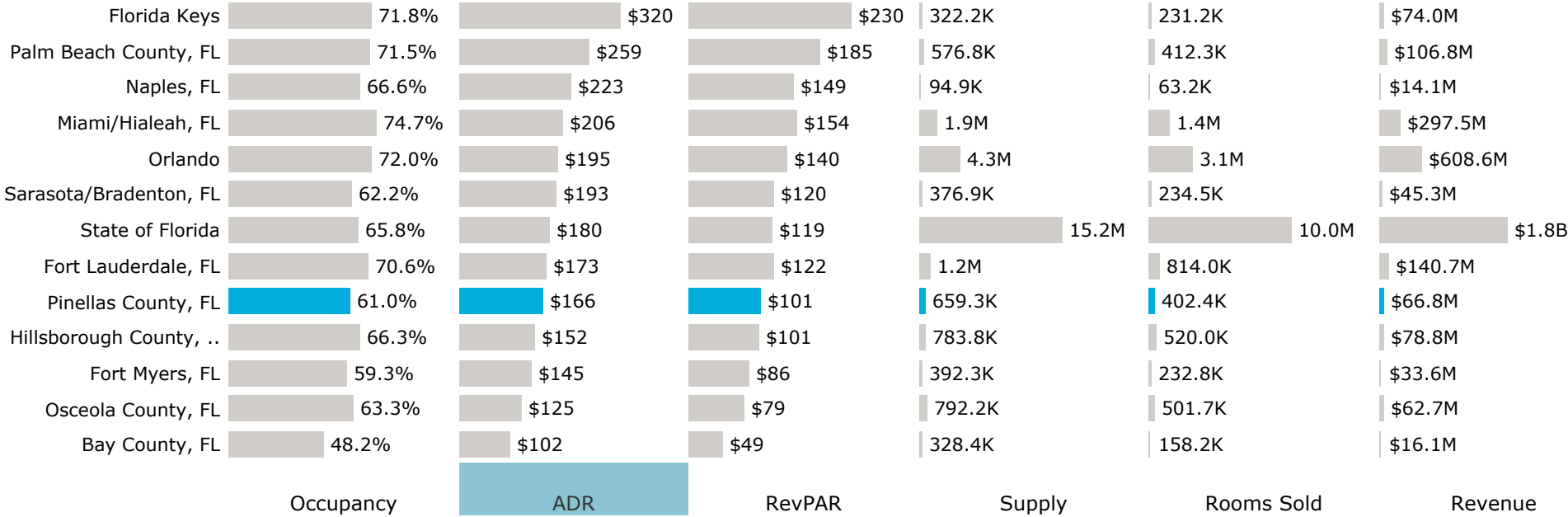
ADR vs. Same Month in Previous Year



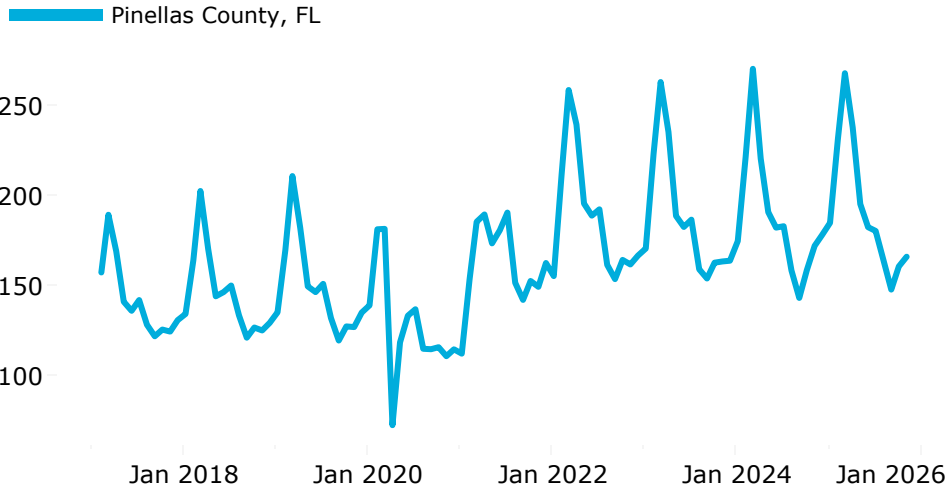
Competitive Markets Hotel Performance
Pinellas County, FL vs. Comp. Markets



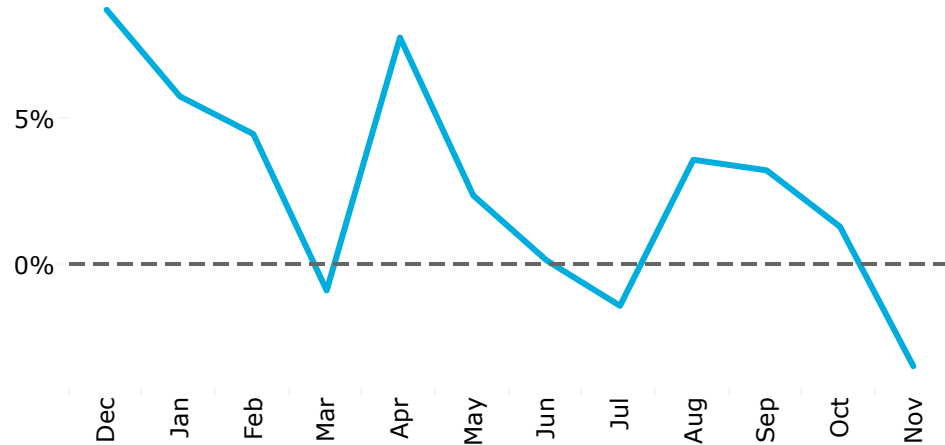
November 2025, Comp. Markets Hotel KPIs



ADR Comparison



ADR vs. Same Month in Previous Year
Last 12 Months



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

	Occ	YOY	ADR	YOY	RevPAR	YOY	Total Supply	YOY	Demand	YOY	Revenue	YOY
Bay County, FL	48.2%	▼ -6.2%	\$102	▼ -2.1%	\$49	▼ -8.1%	328.4K	▼ -0.9%	158.2K	▼ -7.0%	\$16.1M	▼ -8.9%
Florida Keys	71.8%	▲ 0.7%	\$320	▲ 0.5%	\$230	▲ 1.2%	322.2K	▲ 0.0%	231.2K	▲ 0.7%	\$74.0M	▲ 1.2%
Fort Lauderdale, FL	70.6%	▼ -2.5%	\$173	▲ 0.1%	\$122	▼ -2.5%	1.2M	▼ -1.1%	814.0K	▼ -3.6%	\$140.7M	▼ -3.5%
Fort Myers, FL	59.3%	▼ -12.9%	\$145	▼ -0.4%	\$86	▼ -13.2%	392.3K	▲ 12.3%	232.8K	▼ -2.2%	\$33.6M	▼ -2.6%
Hillsborough County..	66.3%	▼ -18.0%	\$152	▼ -10.6%	\$101	▼ -26.7%	783.8K	▲ 3.3%	520.0K	▼ -15.3%	\$78.8M	▼ -24.3%
Miami/Hialeah, FL	74.7%	▲ 1.2%	\$206	▲ 1.1%	\$154	▲ 2.4%	1.9M	▼ -1.8%	1.4M	▼ -0.6%	\$297.5M	▲ 0.5%
Naples, FL	66.6%	▼ -2.5%	\$223	▼ -4.1%	\$149	▼ -6.4%	94.9K	▲ 1.5%	63.2K	▼ -0.9%	\$14.1M	▼ -5.0%
Orlando	72.0%	▼ -0.5%	\$195	▲ 4.0%	\$140	▲ 3.4%	4.3M	▲ 0.6%	3.1M	▲ 0.1%	\$608.6M	▲ 4.0%
Osceola County, FL	63.3%	▼ -5.2%	\$125	▼ -0.1%	\$79	▼ -5.3%	792.2K	▼ -2.7%	501.7K	▼ -7.7%	\$62.7M	▼ -7.8%
Palm Beach County,..	71.5%	▼ -3.2%	\$259	▲ 8.0%	\$185	▲ 4.6%	576.8K	▲ 0.2%	412.3K	▼ -3.0%	\$106.8M	▲ 4.8%
Pinellas County, FL	61.0%	▼ -21.8%	\$166	▼ -3.5%	\$101	▼ -24.5%	659.3K	▲ 4.3%	402.4K	▼ -18.4%	\$66.8M	▼ -21.3%
Sarasota/Bradenton..	62.2%	▼ -18.3%	\$193	▼ -0.3%	\$120	▼ -18.5%	376.9K	▲ 2.9%	234.5K	▼ -15.9%	\$45.3M	▼ -16.1%
State of Florida	65.8%	▼ -6.9%	\$180	▲ 1.2%	\$119	▼ -5.8%	15.2M	▲ 1.2%	10.0M	▼ -5.8%	\$1.8B	▼ -4.7%

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

Source: STR



Pinellas County Tourist Development Tax Collections

November 2025



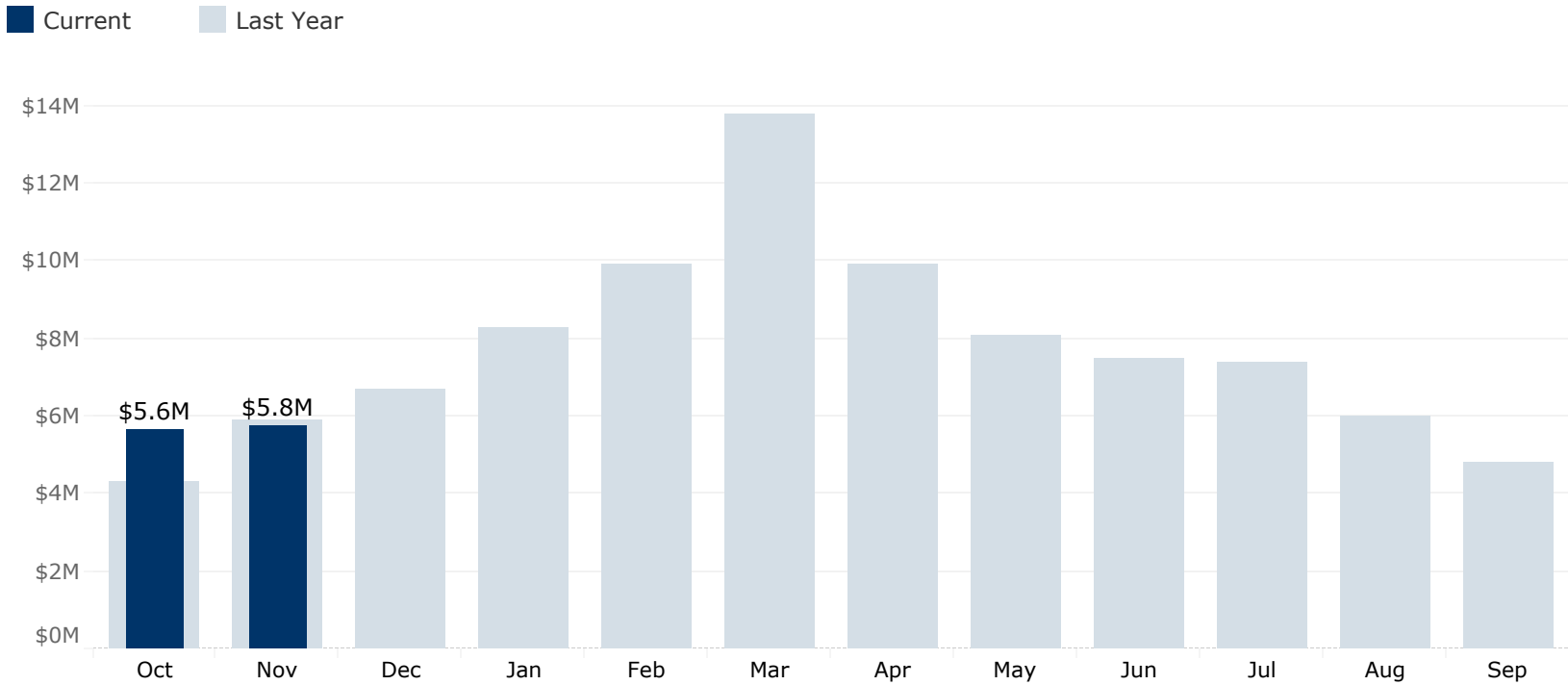
Tourist Development Tax Collections

\$5.8M
-1.8% YOY | +42.7% vs. 2019
Gross Tax Collected

Tourist Development Tax Collections by Month

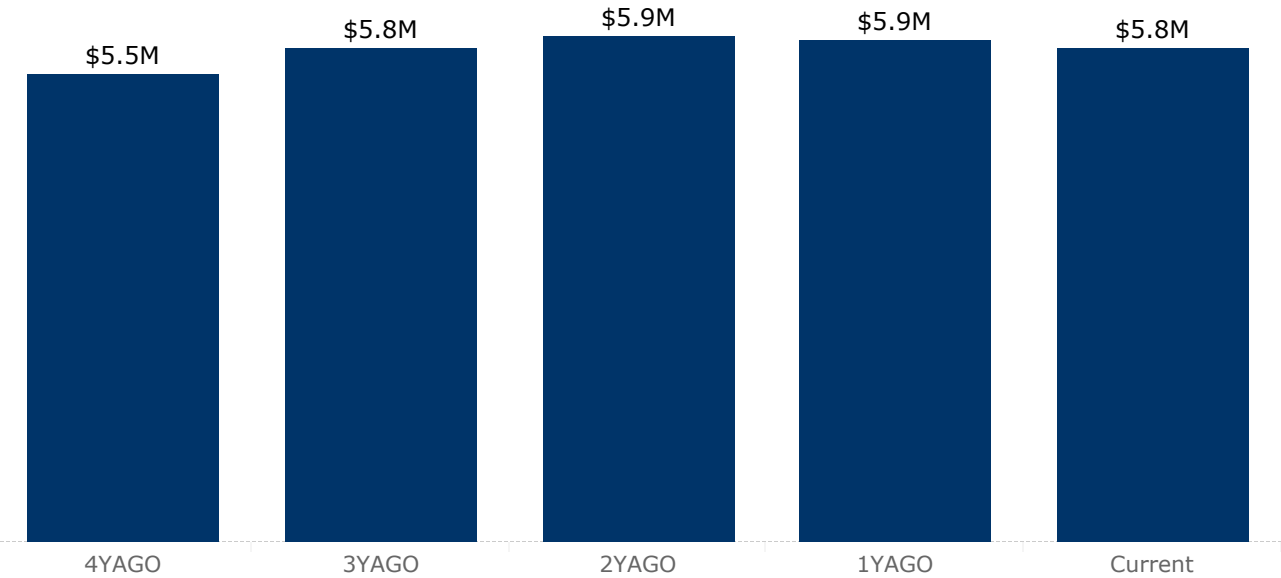
Fiscal Year 2026

Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
\$5.6M	\$5.8M										
+30.4%	-1.8%										



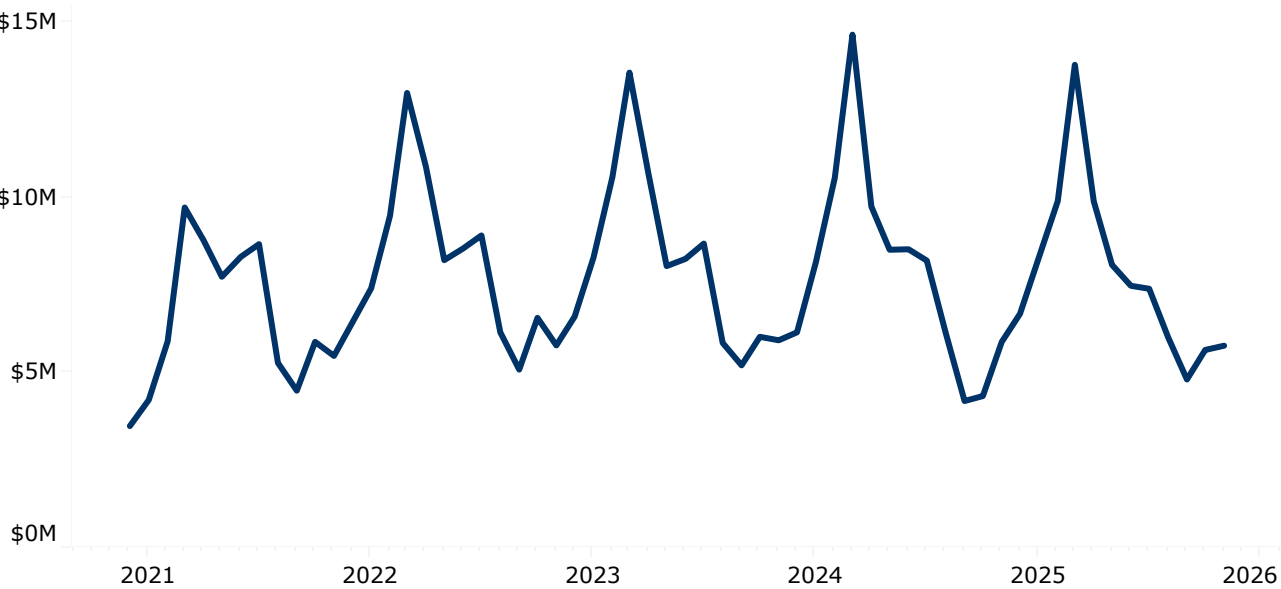
Tourist Development Tax Collections

November 2025 vs. comparable months over the past 5 years



Tourist Development Tax Collections

Long Term Trend





Pinellas County Local Option Tax Collections

November 2025



Local Option Tax Share of Total Collections

	Oct	Nov	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Dec
Miscellaneous/Other	36.04%	35.49%										
Clearwater/Clearwater Beach	29.11%	28.06%										
St Petersburg	13.70%	15.71%										
St Pete Beach/Tierra Verde	9.45%	9.33%										
Treasure Island	3.01%	2.87%										
Oldsmar/Safety Harbor	1.69%	1.79%										
Dunedin	1.63%	1.53%										
Palm Harbor	1.38%	1.37%										
Madeira Beach	1.46%	1.29%										
N Redington Beach/Redington Beach/Redington Shores	0.95%	0.96%										
Indian Rocks Beach	0.62%	0.63%										
Tarpon Springs	0.45%	0.44%										
Indian Shores	0.30%	0.28%										
Belleair/Belleair Beach/Bluffs/Shores	0.21%	0.25%										
Total	100.00%	100.00%										

Source: Pinellas County Tax Collector

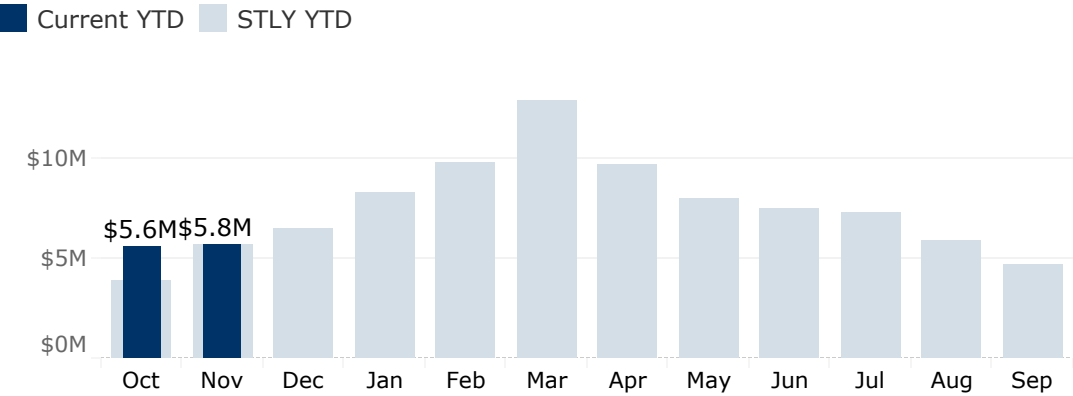
Tourist Development Tax Collections

November 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

