



ST.PETE
CLEARWATER
FLORIDA

Economic Snapshot Report

January 2026 TDC Meeting - November 2025 Data

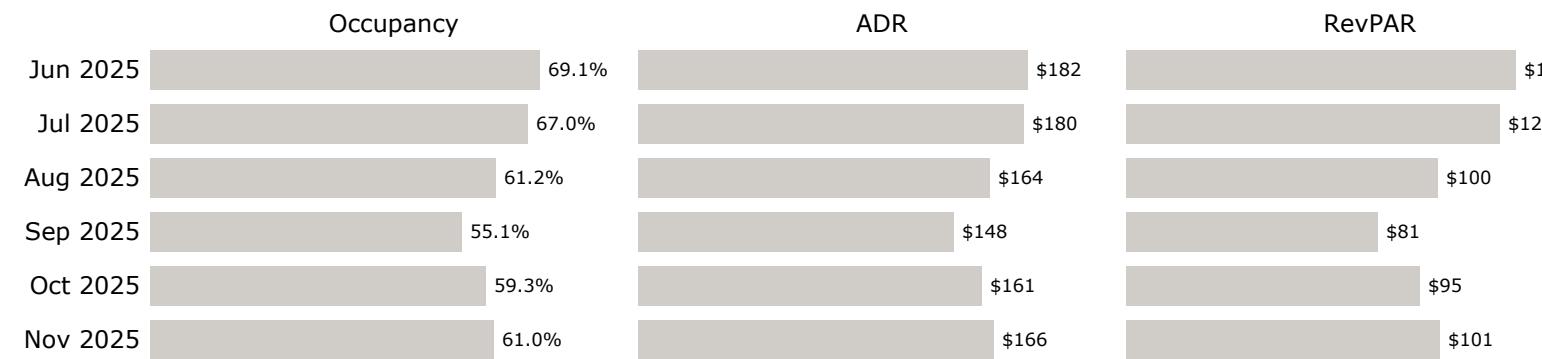
Hotel Performance Summary

Pinellas County, FL | November 2025



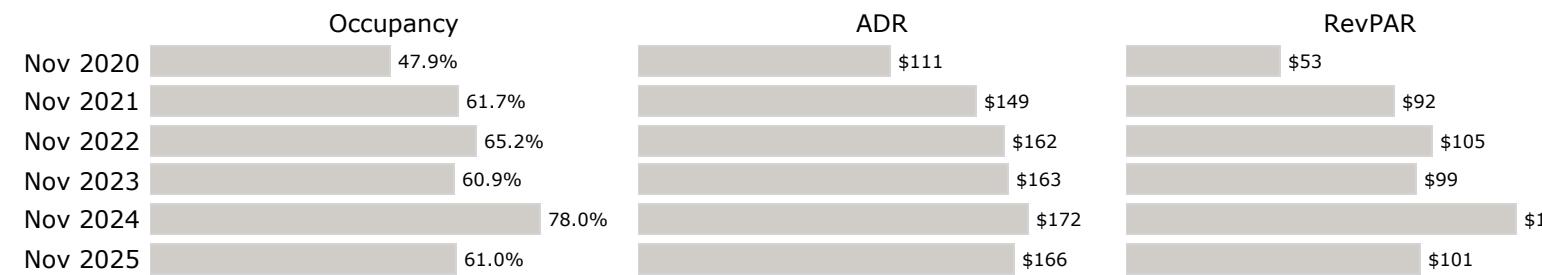
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
	61.0%	\$165.97	\$101.29	659.3K	402.4K	\$66.8M
Change vs. Previous Year	▼ -21.8%	▼ -3.5%	▼ -24.5%	▲ 4.3%	▼ -18.4%	▼ -21.3%
YTD Fiscal Year	60.2%	\$163.26	\$98.21	1.3M	806.5K	\$131.7M
YTD Change vs. Previous Year	▼ -18.8%	▼ -1.4%	▼ -19.9%	▲ 4.8%	▼ -14.9%	▼ -16.1%

Last Six Months Performance

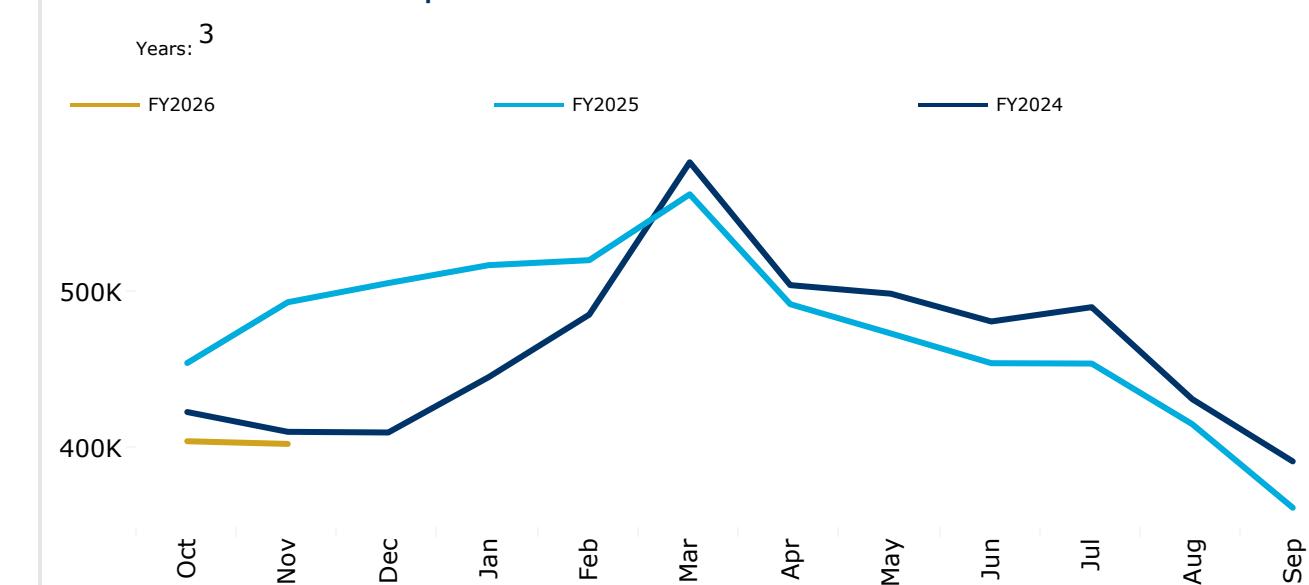


November Performance by Year

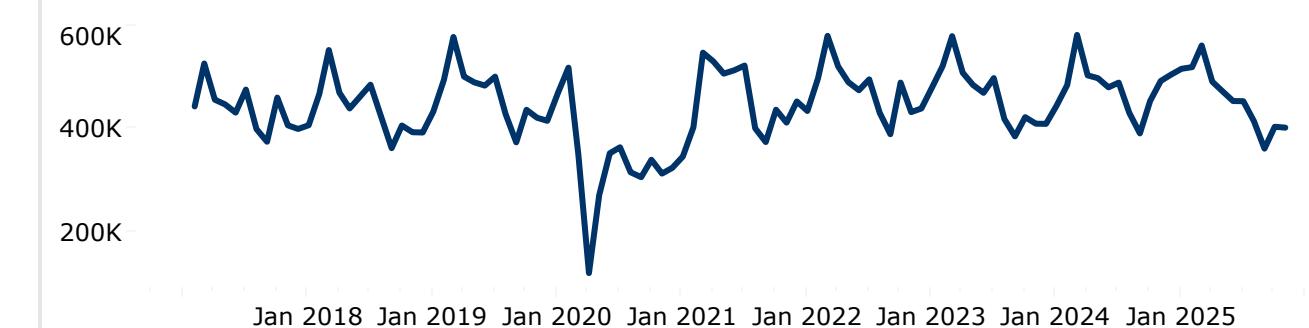
Pinellas County, FL



Demand YOY Comparison



Demand Long Term Trend

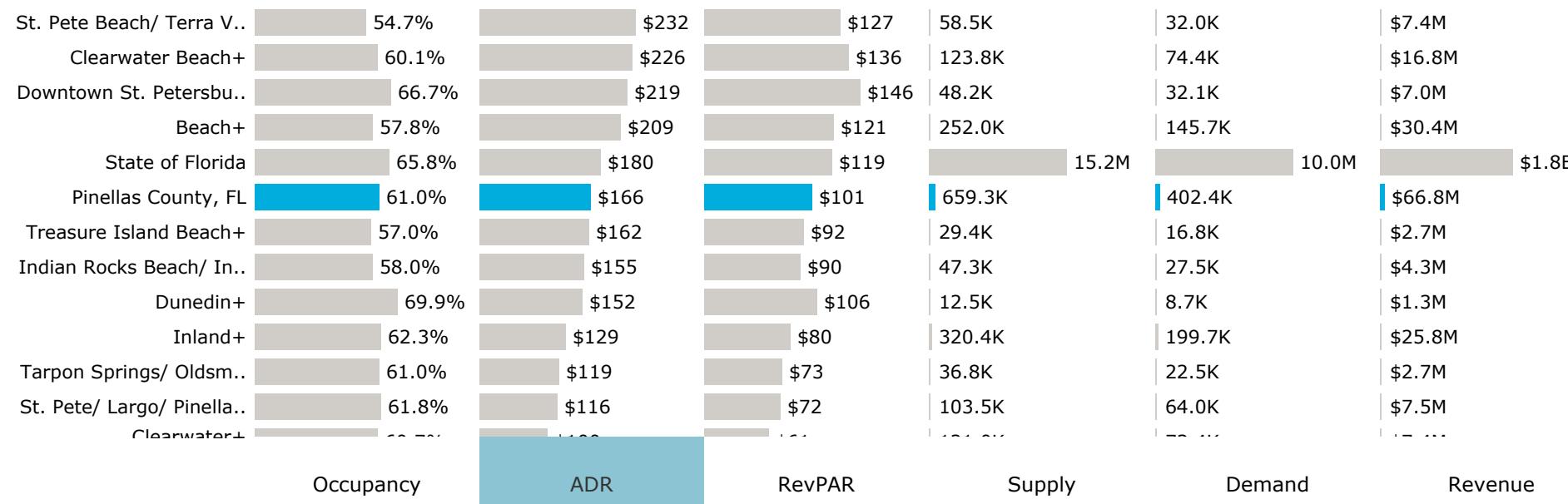


Submarkets Hotel Performance

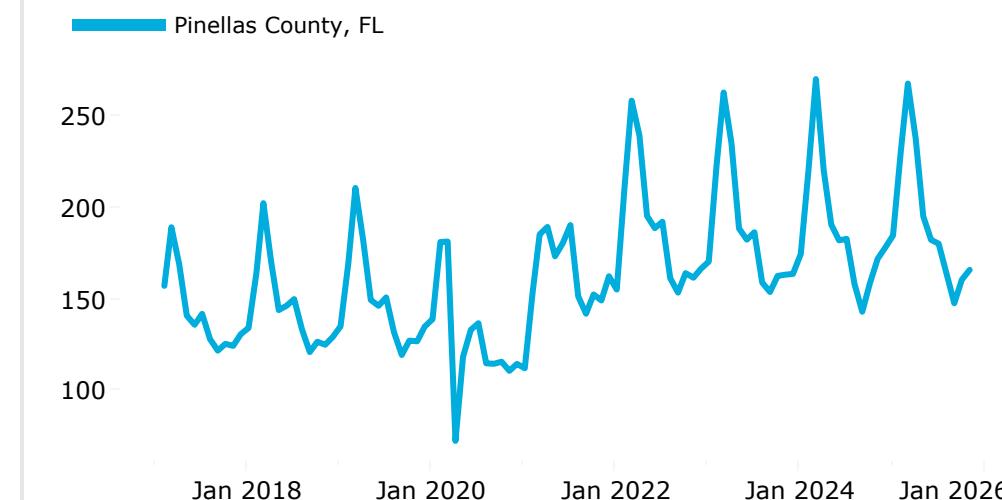
Pinellas County, FL vs. Submarkets



November 2025, Submarket Hotel KPIs



ADR Comparison



November 2025, Submarket Hotel Performance vs. Previous Year

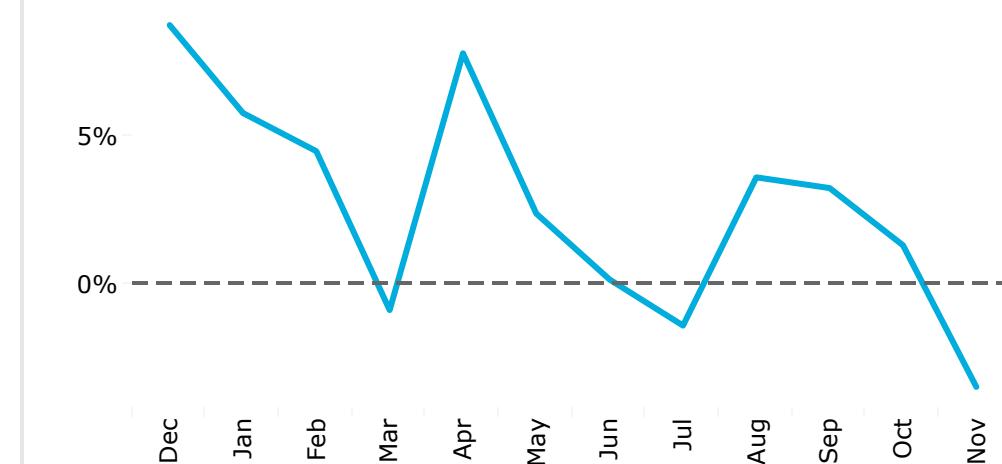
	Occ	YOY	ADR	YOY	RevPAR	YOY	Total Supply	YOY	Rooms Sold	YOY	Room Revenue	YOY
Clearwater Beach+	60.1%	▼ -11.5%	\$226	▲ 0.2%	\$136	▼ -11.4%	123.8K	▲ 0.7%	74.4K	▼ -10.9%	\$16.8M	▼ -10.7%
Clearwater+	60.7%	▼ -29.9%	\$100	▼ -26.1%	\$61	▼ -48.2%	121.0K	▼ -4.5%	73.4K	▼ -33.0%	\$7.4M	▼ -50.5%
Downtown St. Petersburg+	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 vs. Same Month in Previous Year

Last 12 Months



Competitive Markets Hotel Performance

Pinellas County, FL vs. Comp. Markets



November 2025, Comp. Markets Hotel KPIs

Florida Keys	71.8%	\$320	\$230	322.2K	231.2K	\$74.0M
Palm Beach County, FL	71.5%	\$259	\$185	576.8K	412.3K	\$106.8M
Naples, FL	66.6%	\$223	\$149	94.9K	63.2K	\$14.1M
Miami/Hialeah, FL	74.7%	\$206	\$154	1.9M	1.4M	\$297.5M
Orlando	72.0%	\$195	\$140	4.3M	3.1M	\$608.6M
Sarasota/Bradenton, FL	62.2%	\$193	\$120	376.9K	234.5K	\$45.3M
State of Florida	65.8%	\$180	\$119	15.2M	10.0M	\$1.8B
Fort Lauderdale, FL	70.6%	\$173	\$122	1.2M	814.0K	\$140.7M
Pinellas County, FL	61.0%	\$166	\$101	659.3K	402.4K	\$66.8M
Hillsborough County, ..	66.3%	\$152	\$101	783.8K	520.0K	\$78.8M
Fort Myers, FL	59.3%	\$145	\$86	392.3K	232.8K	\$33.6M
Osceola County, FL	63.3%	\$125	\$79	792.2K	501.7K	\$62.7M
Bay County, FL	48.2%	\$102	\$49	328.4K	158.2K	\$16.1M

Occupancy ADR RevPAR Supply Rooms Sold Revenue

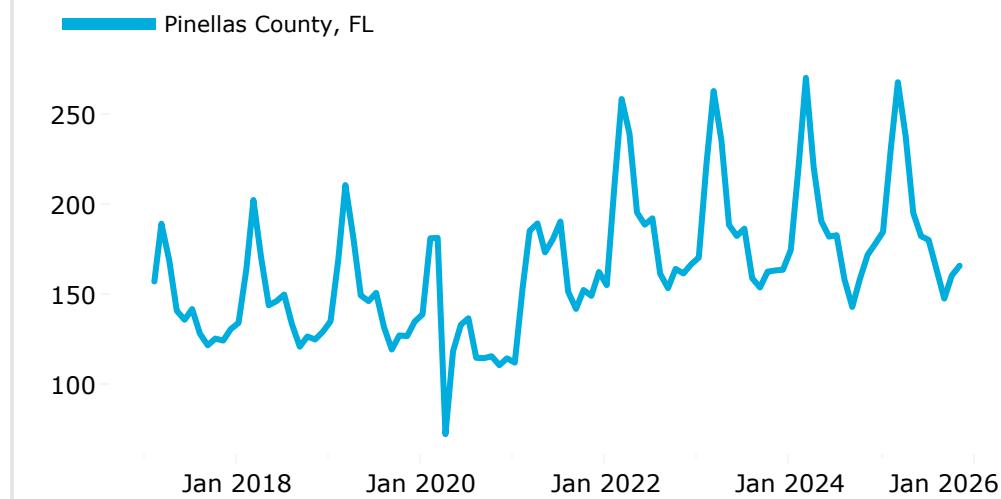
November 2025, Comp. Markets Hotel Performance vs. Previous Year

	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

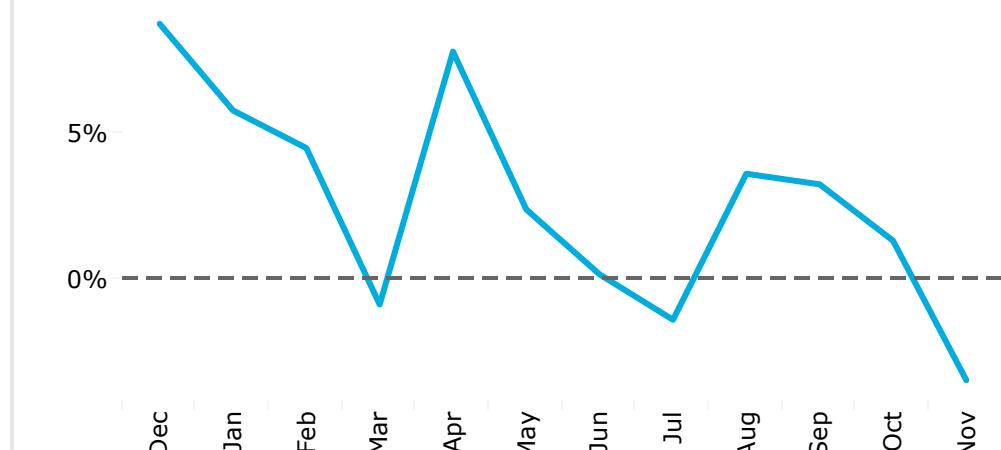
Source: STR

ADR Comparison



ADR vs. Same Month in Previous Year

Last 12 Months





Pinellas County Tourist Development Tax Collections

November 2025



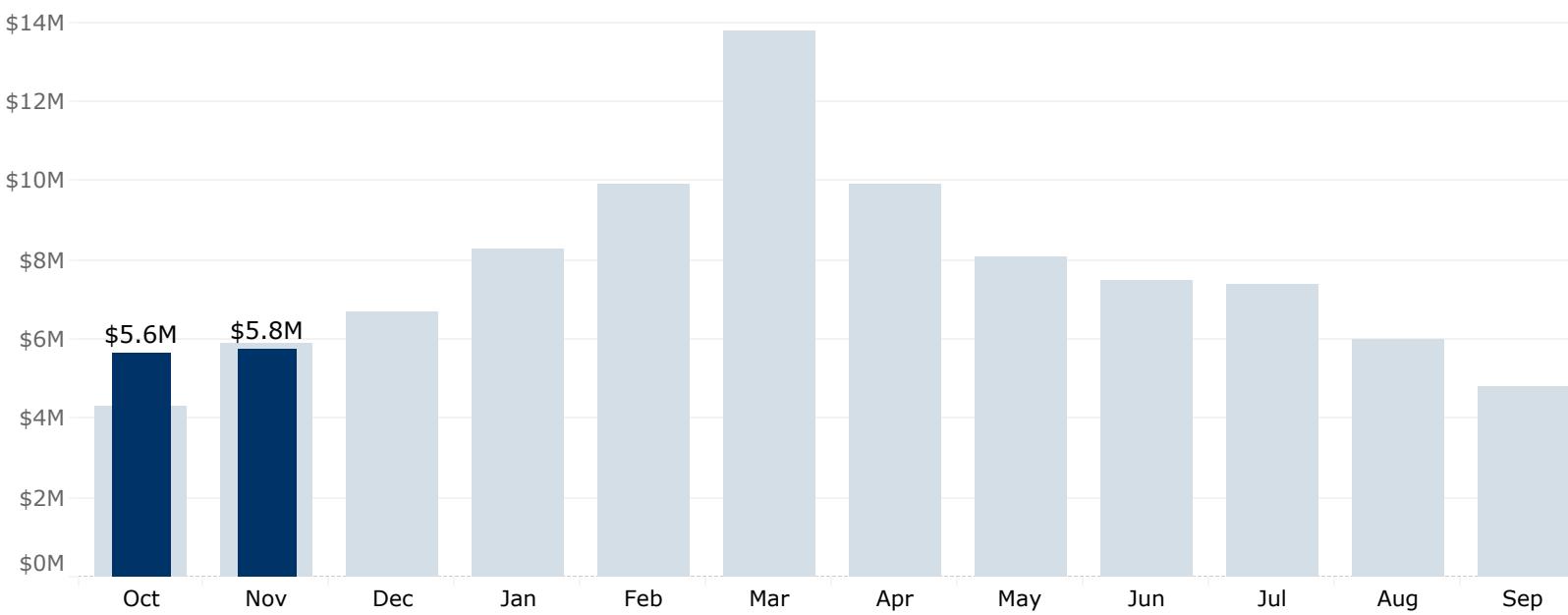
Tourist Development Tax Collections
\$5.8M
-1.8% YOY | +42.7% vs. 2019
Gross Tax Collected

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%										

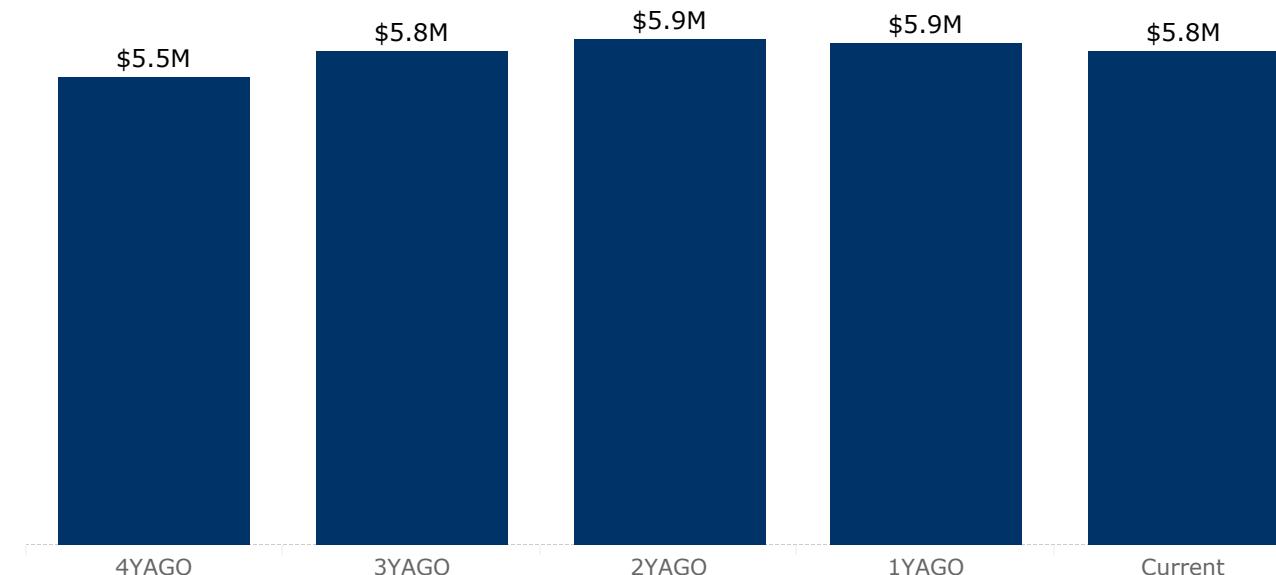
Current Last Year



Source: Pinellas County Tax Collector

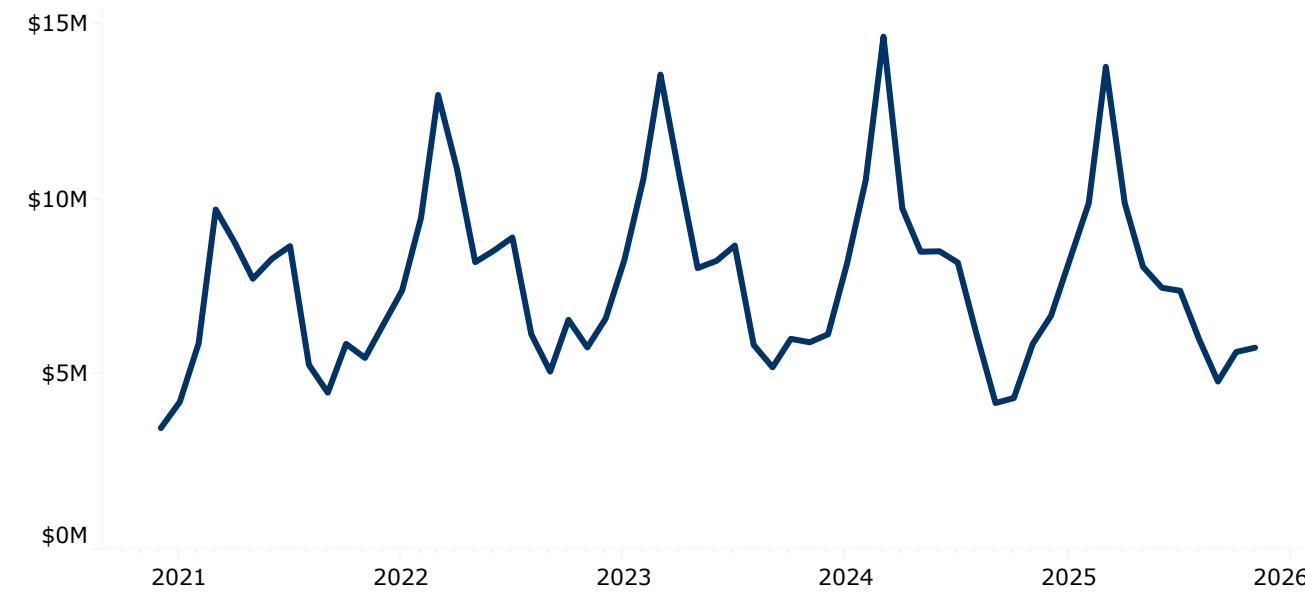
Tourist Development Tax Collections

November 2025 vs. comparable months over the past 5 years



Tourist Development Tax Collections

Long Term Trend



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Pinellas County Local Option Tax Collections

November 2025

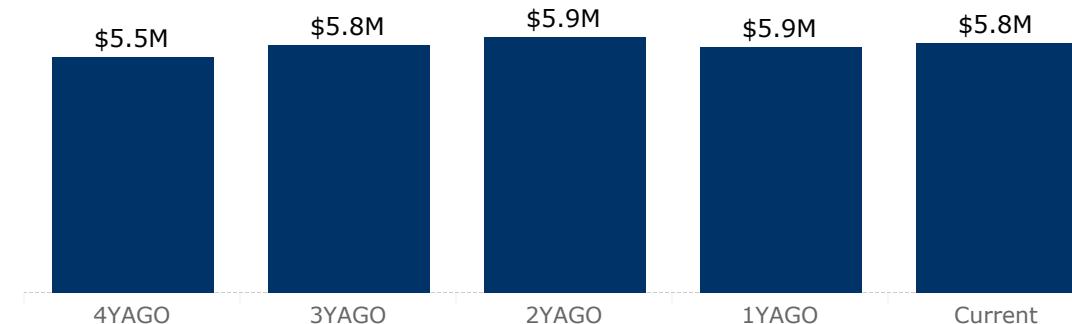


Local Option Tax Share of Total Collections

	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%										

Tourist Development Tax Collections

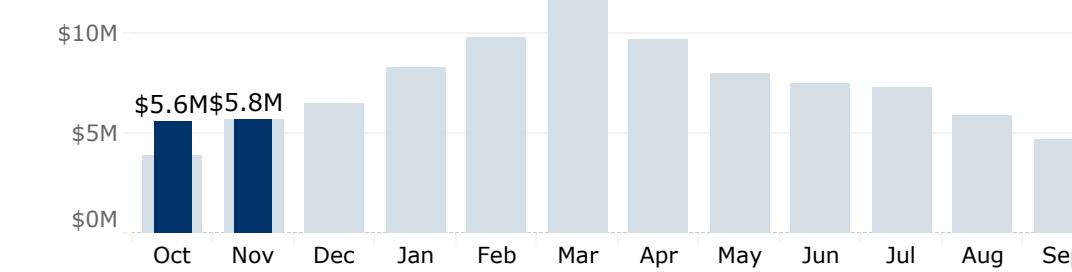
November 2025 vs. comparable months over the past 5 years



Tourist Development Tax Collections by Month

Fiscal Year 2026

Current YTD STLY YTD



Tourist Development Tax Collections

Long Term Trend

