



ST.PETE
CLEARWATER
FLORIDA

Economic Snapshot Report

November 2025 TDC Meeting - September 2025 Data

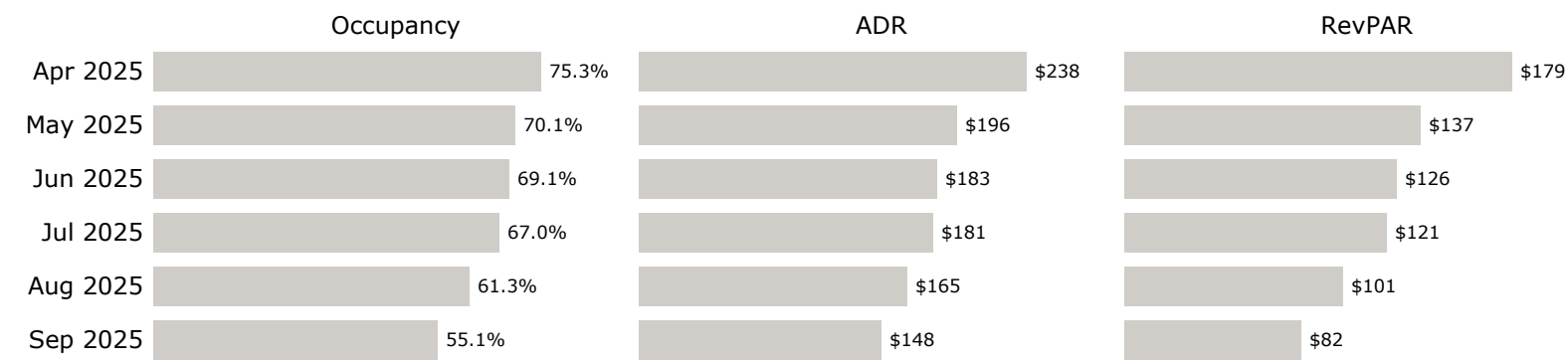
Hotel Performance Summary

Pinellas County, FL | September 2025



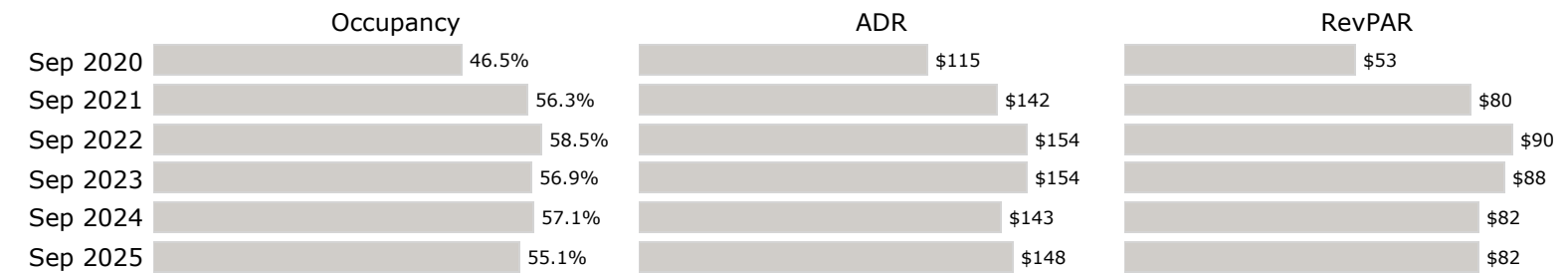
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
	55.1%	\$148.21	\$81.66	654.2K	360.5K	\$53.4M
Change vs. Previous Year	▼ -3.5%	▲ 3.4%	▼ -0.2%	▼ -4.2%	▼ -7.6%	▼ -4.4%
YTD Fiscal Year	72.5%	\$194.79	\$141.27	7.8M	5.7M	\$1.1B
YTD Change vs. Previous Year	▲ 7.6%	▲ 2.5%	▲ 10.3%	▼ -4.5%	▲ 2.7%	▲ 5.3%

Last Six Months Performance

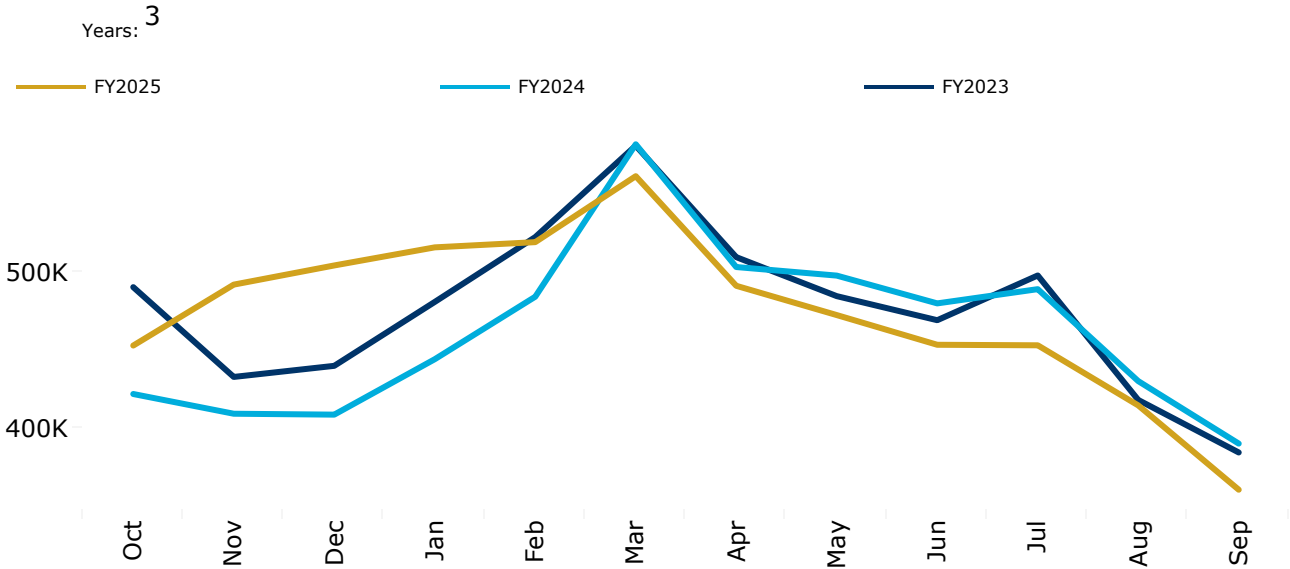


September Performance by Year

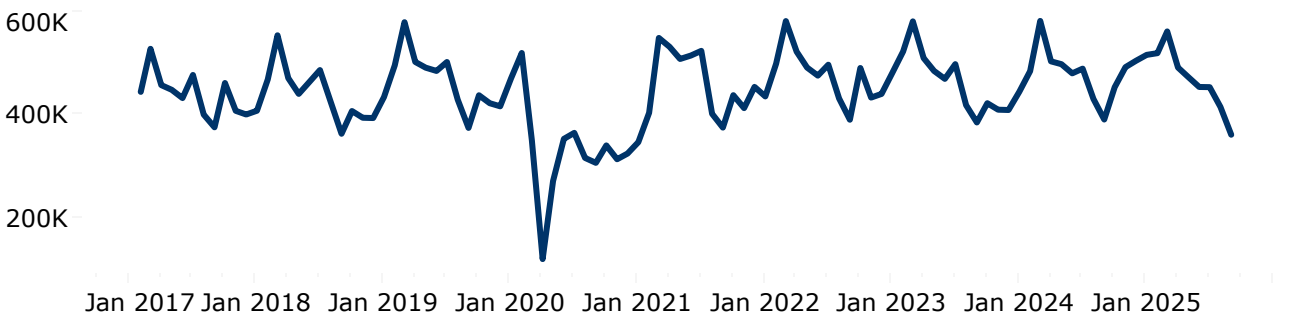
Pinellas County, FL



Demand YOY Comparison



Demand Long Term Trend

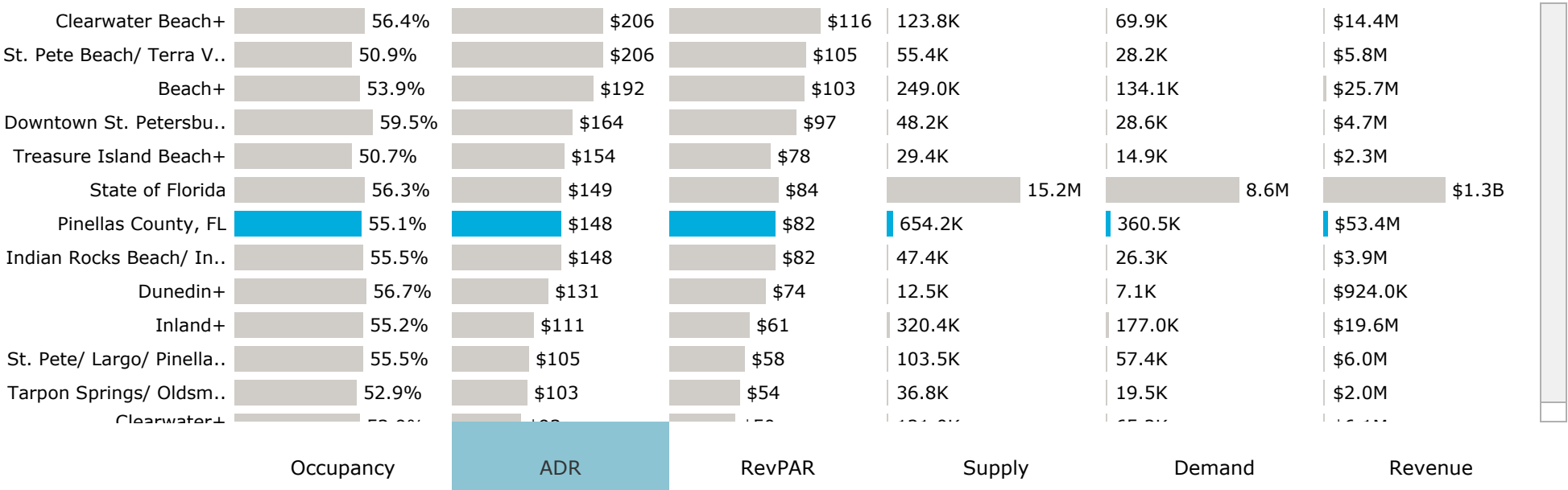


Submarkets Hotel Performance

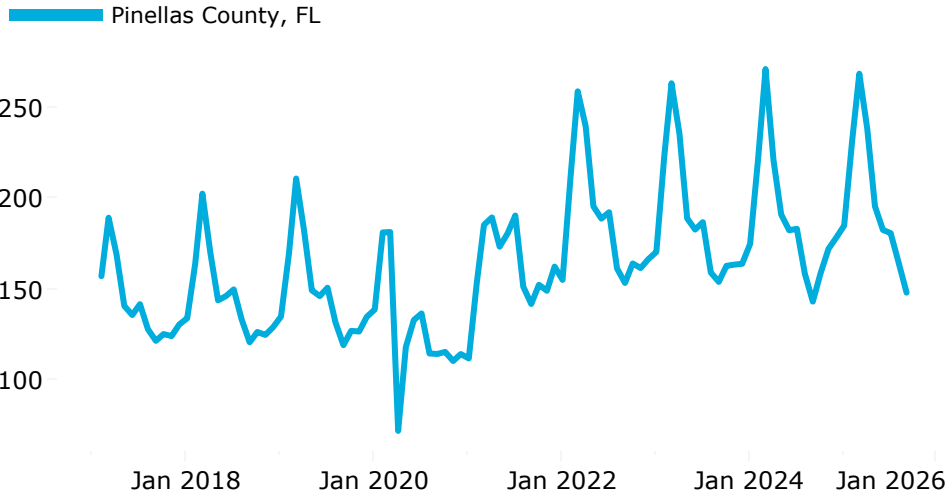
Pinellas County, FL vs. Submarkets



September 2025, Submarket Hotel KPIs

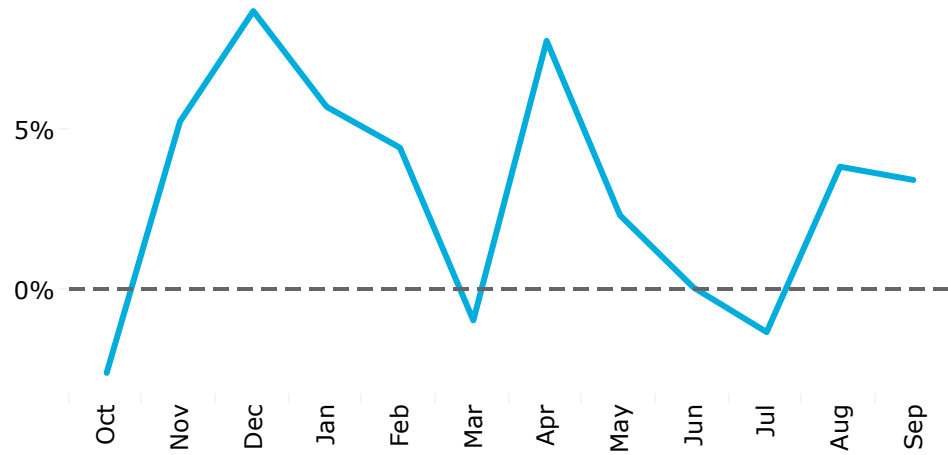


ADR Comparison



ADR vs. Same Month in Previous Year

Last 12 Months



September 2025, Submarket Hotel Performance vs. Previous Year

	Occ	YOY	ADR	YOY	RevPAR	YOY	Total Supply	YOY	Rooms Sold	YOY	Room Revenue	YOY
Clearwater Beach+	56.4%	▲ 11.4%	\$206	▼ -1.1%	\$116	▲ 10.2%	123.8K	▼ -2.3%	69.9K	▲ 8.9%	\$14.4M	▲ 7.7%
Clearwater+	53.9%	▼ -14.8%	\$93	▼ -0.2%	\$50	▼ -15.1%	121.0K	▼ -4.5%	65.2K	▼ -18.7%	\$6.1M	▼ -18.9%
Downtown St. Petersburg+	59.5%	▲ 1.0%	\$164	▼ -3.4%	\$97	▼ -2.4%	48.2K	▼ -0.2%	28.6K	▲ 0.9%	\$4.7M	▼ -2.6%
Dunedin+	56.7%	▼ -1.8%	\$131	▼ -9.9%	\$74	▼ -11.5%	12.5K	▲ 0.0%	7.1K	▼ -1.8%	\$924.0K	▼ -11.5%
Indian Rocks Beach/ Indian Shores/ Madeir..	55.5%	▼ -4.4%	\$148	▲ 6.1%	\$82	▲ 1.4%	47.4K	▼ -4.2%	26.3K	▼ -8.5%	\$3.9M	▼ -2.9%
Pinellas County, FL	55.1%	▼ -3.5%	\$148	▲ 3.4%	\$82	▼ -0.2%	654.2K	▼ -4.2%	360.5K	▼ -7.6%	\$53.4M	▼ -4.4%
St. Pete Beach/ Terra Verde+	50.9%	▲ 13.6%	\$206	▲ 9.0%	\$105	▲ 23.9%	55.4K	▼ -31.9%	28.2K	▼ -22.6%	\$5.8M	▼ -15.6%
St. Pete/ Largo/ Pinellas Park+	55.5%	▼ -11.9%	\$105	▼ -5.2%	\$58	▼ -16.5%	103.5K	▼ -0.6%	57.4K	▼ -12.4%	\$6.0M	▼ -17.0%
Tarpon Springs/ Oldsmar/ Palm Harbor..	52.9%	▼ -16.8%	\$103	▼ -15.7%	\$54	▼ -29.8%	36.8K	▼ -0.5%	19.5K	▼ -17.2%	\$2.0M	▼ -30.2%
Treasure Island Beach+	50.7%	▼ -3.5%	\$154	▲ 1.5%	\$78	▼ -2.0%	29.4K	▼ -15.1%	14.9K	▼ -18.0%	\$2.3M	▼ -16.8%

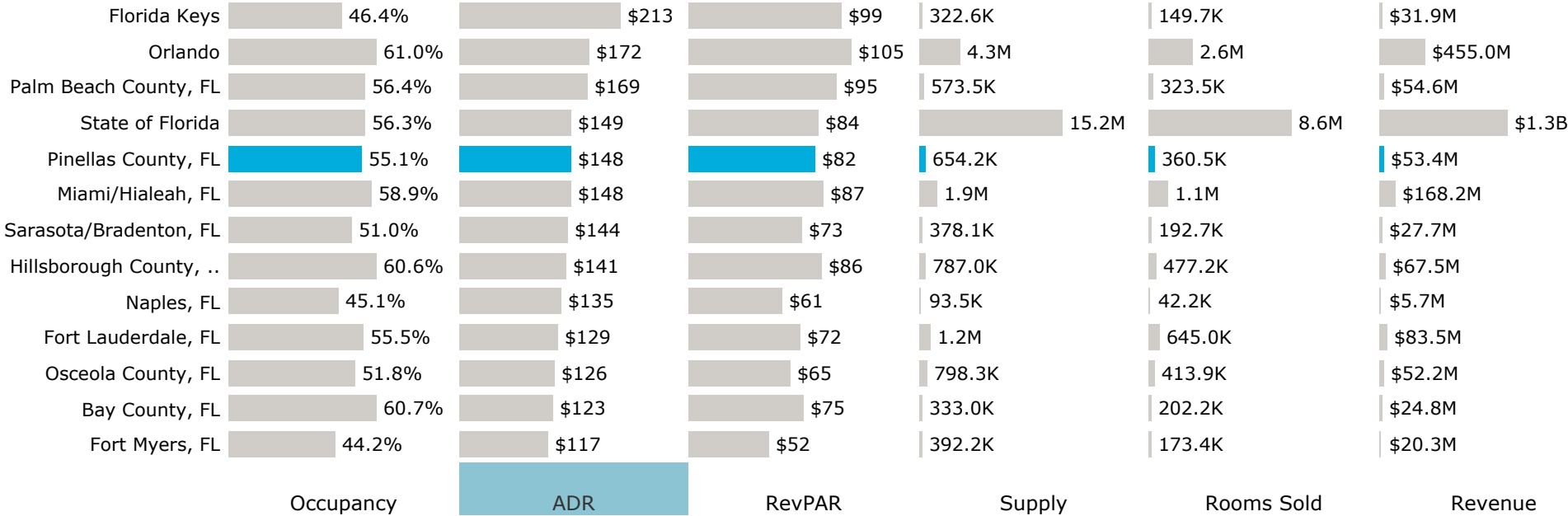
History for submarkets varies. Click on a submarket to check its history in the line charts

Source: STR

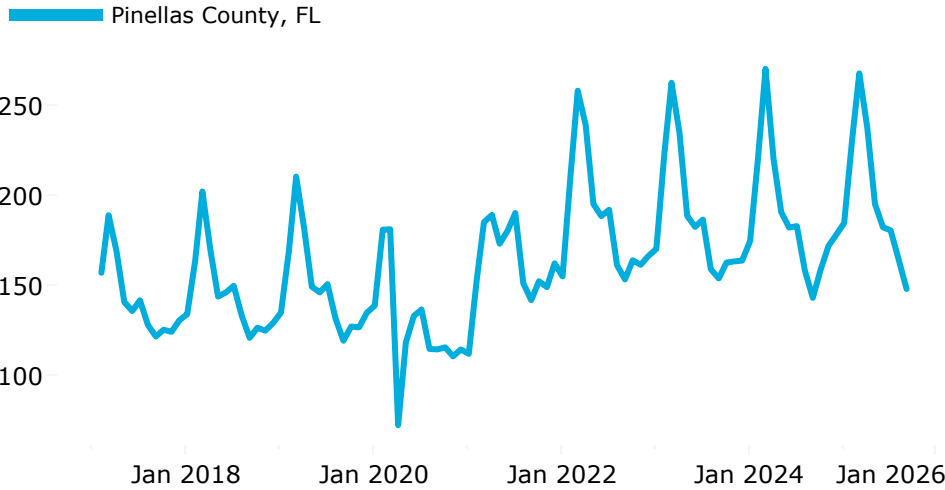
Competitive Markets Hotel Performance
Pinellas County, FL vs. Comp. Markets



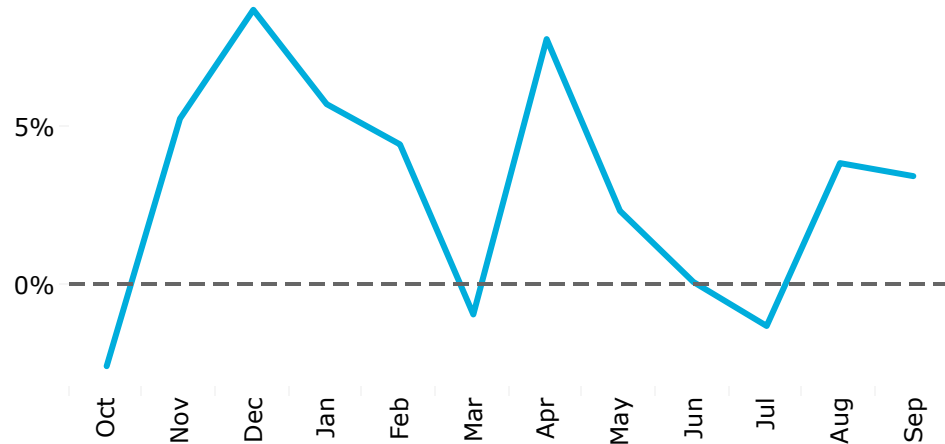
September 2025, Comp. Markets Hotel KPIs



ADR Comparison



ADR vs. Same Month in Previous Year
Last 12 Months



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

	Occ	YOY	ADR	YOY	RevPAR	YOY	Total Supply	YOY	Demand	YOY	Revenue	YOY
Bay County, FL	60.7%	▲ 1.0%	\$123	▲ 0.0%	\$75	▲ 1.0%	333.0K	▼ -0.4%	202.2K	▲ 0.6%	\$24.8M	▲ 0.6%
Florida Keys	46.4%	▼ -10.2%	\$213	▼ -5.7%	\$99	▼ -15.3%	322.6K	▲ 2.2%	149.7K	▼ -8.2%	\$31.9M	▼ -13.4%
Fort Lauderdale, FL	55.5%	▼ -5.0%	\$129	▼ -2.6%	\$72	▼ -7.4%	1.2M	▼ -1.1%	645.0K	▼ -6.0%	\$83.5M	▼ -8.5%
Fort Myers, FL	44.2%	▼ -11.0%	\$117	▼ -1.0%	\$52	▼ -11.9%	392.2K	▲ 11.4%	173.4K	▼ -0.9%	\$20.3M	▼ -1.9%
Hillsborough County..	60.6%	▼ -7.6%	\$141	▼ -1.3%	\$86	▼ -8.8%	787.0K	▲ 1.4%	477.2K	▼ -6.3%	\$67.5M	▼ -7.5%
Miami/Hialeah, FL	58.9%	▼ -5.0%	\$148	▼ -4.3%	\$87	▼ -9.1%	1.9M	▼ -1.5%	1.1M	▼ -6.4%	\$168.2M	▼ -10.5%
Naples, FL	45.1%	▲ 0.4%	\$135	▼ -8.5%	\$61	▼ -8.2%	93.5K	▲ 0.0%	42.2K	▲ 0.4%	\$5.7M	▼ -8.1%
Orlando	61.0%	▼ -4.2%	\$172	▼ -1.4%	\$105	▼ -5.6%	4.3M	▲ 0.9%	2.6M	▼ -3.4%	\$455.0M	▼ -4.8%
Osceola County, FL	51.8%	▼ -7.4%	\$126	▲ 3.1%	\$65	▼ -4.5%	798.3K	▼ -1.9%	413.9K	▼ -9.1%	\$52.2M	▼ -6.3%
Palm Beach County,..	56.4%	▼ -2.2%	\$169	▲ 1.8%	\$95	▼ -0.4%	573.5K	▲ 0.2%	323.5K	▼ -2.0%	\$54.6M	▼ -0.2%
Pinellas County, FL	55.1%	▼ -3.5%	\$148	▲ 3.4%	\$82	▼ -0.2%	654.2K	▼ -4.2%	360.5K	▼ -7.6%	\$53.4M	▼ -4.4%
Sarasota/Bradenton..	51.0%	▼ -9.7%	\$144	▲ 1.8%	\$73	▼ -8.1%	378.1K	▼ -1.1%	192.7K	▼ -10.7%	\$27.7M	▼ -9.1%
State of Florida	56.3%	▼ -5.4%	\$149	▼ -1.5%	\$84	▼ -6.8%	15.2M	▲ 0.7%	8.6M	▼ -4.8%	\$1.3B	▼ -6.1%

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

Source: STR



Pinellas County Tourist Development Tax Collections

September 2025



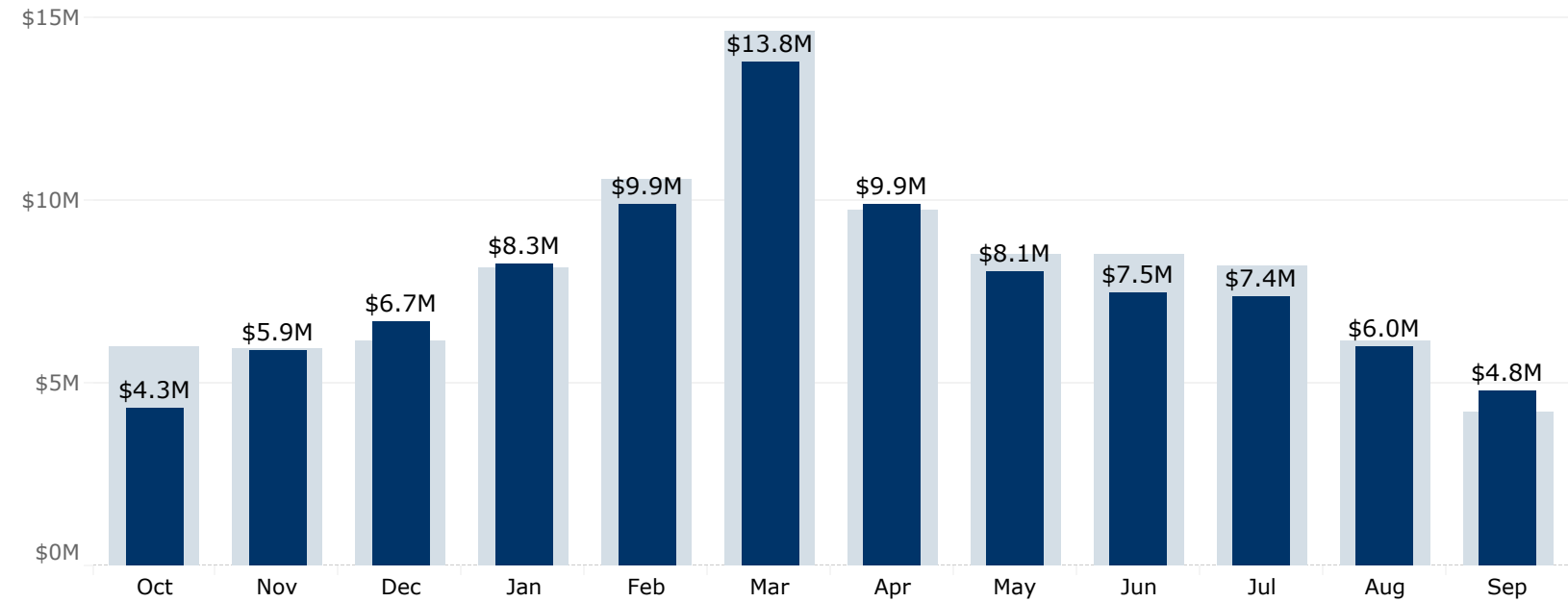
Tourist Development Tax Collections
\$4.8M
+14.7% YOY | +45.5% vs. 2019
Gross Tax Collected

Tourist Development Tax Collections by Month

Fiscal Year 2025

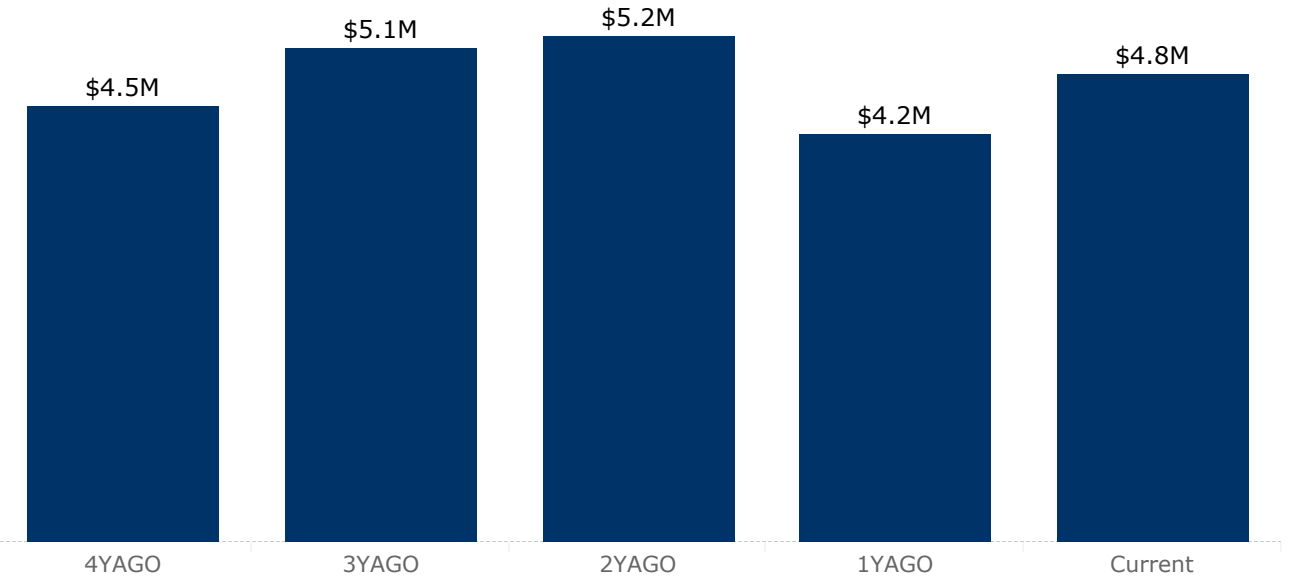
Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
\$4.3M	\$5.9M	\$6.7M	\$8.3M	\$9.9M	\$13.8M	\$9.9M	\$8.1M	\$7.5M	\$7.4M	\$6.0M	\$4.8M
-28.1%	-0.8%	+8.6%	+1.6%	-6.3%	-5.9%	+1.6%	-5.1%	-12.2%	-9.8%	-2.0%	+14.7%

■ Current ■ Last Year



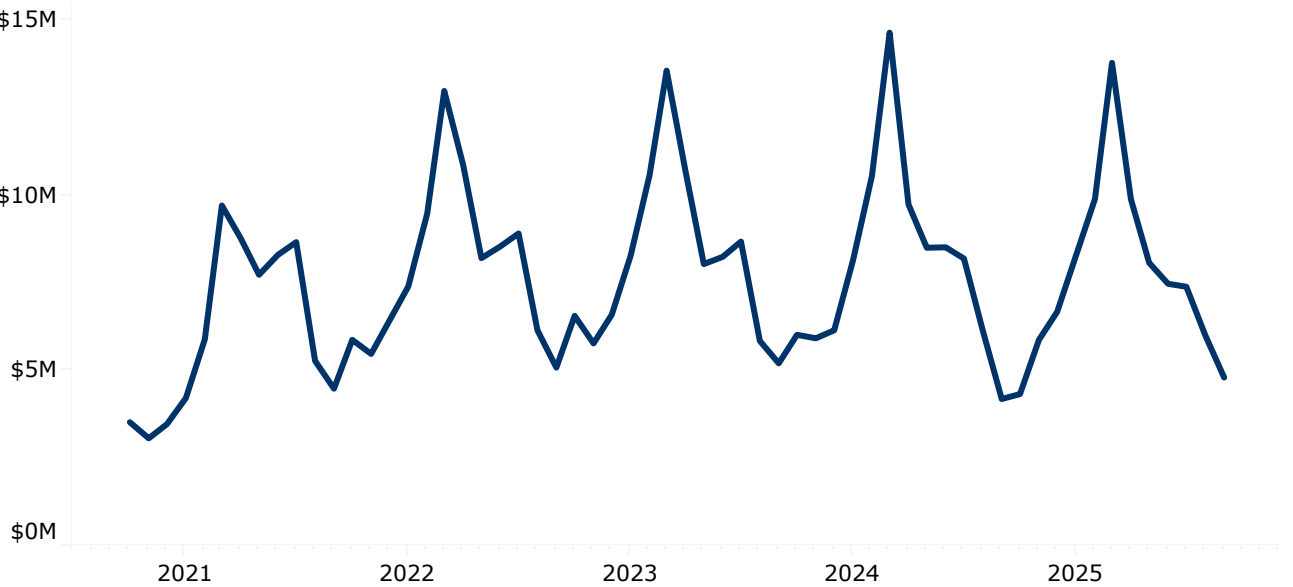
Tourist Development Tax Collections

September 2025 vs. comparable months over the past 5 years



Tourist Development Tax Collections

Long Term Trend





Pinellas County Local Option Tax Collections

September 2025



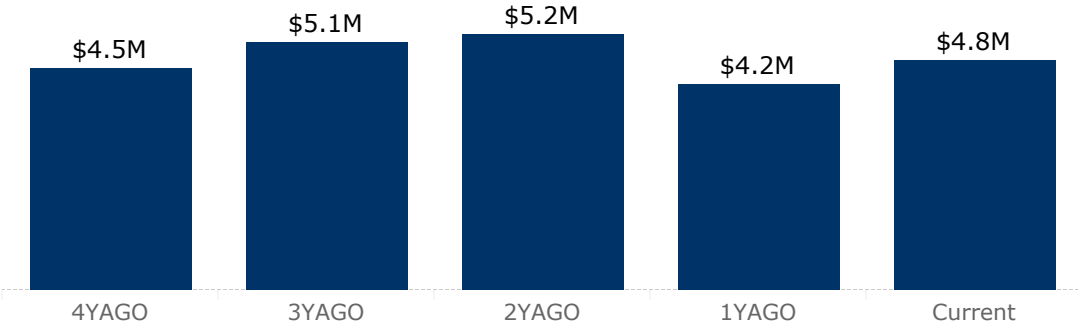
Local Option Tax Share of Total Collections

	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Miscellaneous/Other	19.43%	28.96%	31.99%	41.30%	35.44%	32.87%	31.64%	33.98%	35.75%	35.82%	33.93%	36.55%
Clearwater/Clearwater Beach	35.79%	33.29%	30.53%	24.74%	28.67%	31.71%	32.54%	32.65%	31.04%	32.20%	32.14%	29.40%
St Petersburg	25.35%	19.57%	18.29%	16.59%	15.65%	13.48%	13.00%	12.21%	10.71%	9.03%	11.96%	13.18%
St Pete Beach/Tierra Verde	4.12%	4.76%	5.27%	4.97%	6.98%	8.80%	11.20%	9.91%	10.76%	11.38%	11.10%	9.31%
Treasure Island	2.20%	2.67%	2.99%	2.42%	3.31%	3.44%	3.21%	3.57%	3.80%	3.94%	3.26%	2.94%
Oldsmar/Safety Harbor	3.81%	3.15%	2.86%	2.45%	2.06%	1.31%	1.50%	1.20%	0.73%	1.10%	1.43%	1.54%
Dunedin	2.13%	1.51%	1.59%	1.21%	1.42%	1.42%	1.27%	1.23%	1.26%	1.19%	1.35%	1.49%
Madeira Beach	1.93%	1.48%	1.95%	1.59%	1.58%	1.70%	1.39%	1.45%	1.63%	1.51%	1.41%	1.43%
Palm Harbor	2.25%	1.36%	1.31%	1.38%	1.49%	1.04%	1.08%	0.90%	0.65%	0.55%	0.67%	1.15%
N Redington Beach/Redington Shores	0.86%	0.86%	0.81%	1.26%	1.12%	1.35%	1.21%	1.17%	1.23%	1.24%	1.18%	1.08%
Indian Rocks Beach	0.24%	0.90%	0.98%	0.92%	1.01%	1.41%	0.89%	0.83%	1.25%	1.00%	0.61%	0.97%
Tarpon Springs	1.48%	0.93%	0.73%	0.61%	0.53%	0.59%	0.45%	0.40%	0.42%	0.41%	0.44%	0.45%
Indian Shores	0.17%	0.29%	0.45%	0.35%	0.50%	0.65%	0.40%	0.34%	0.60%	0.46%	0.38%	0.35%
Belleair/Belleair Beach/Bluffs/Shores	0.24%	0.25%	0.26%	0.21%	0.23%	0.24%	0.22%	0.18%	0.18%	0.19%	0.14%	0.17%
Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Source: Pinellas County Tax Collector

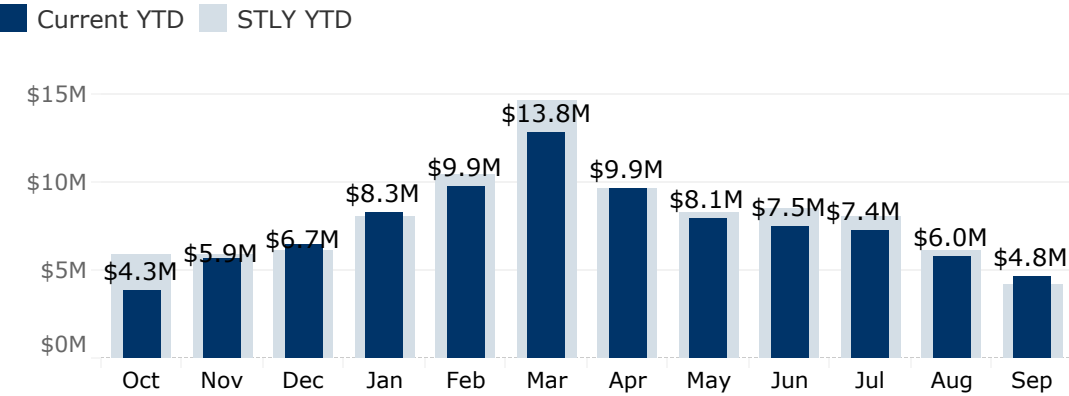
Tourist Development Tax Collections

September 2025 vs. comparable months over the past 5 years



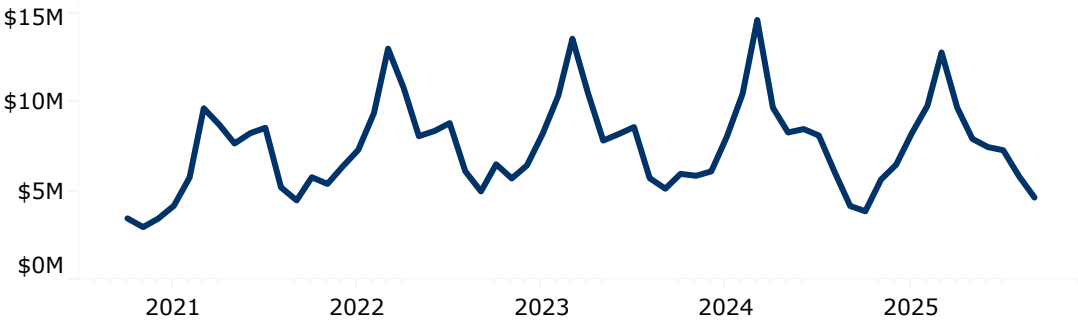
Tourist Development Tax Collections by Month

Fiscal Year 2025



Tourist Development Tax Collections

Long Term Trend





Pinellas County Tourist Development Tax Collections

Oct 2024 - Sep 2025



Tourist Development Tax Collections

\$92.5M

-4.4% YOY | +46.7% vs. 2019

Gross Tax Collected

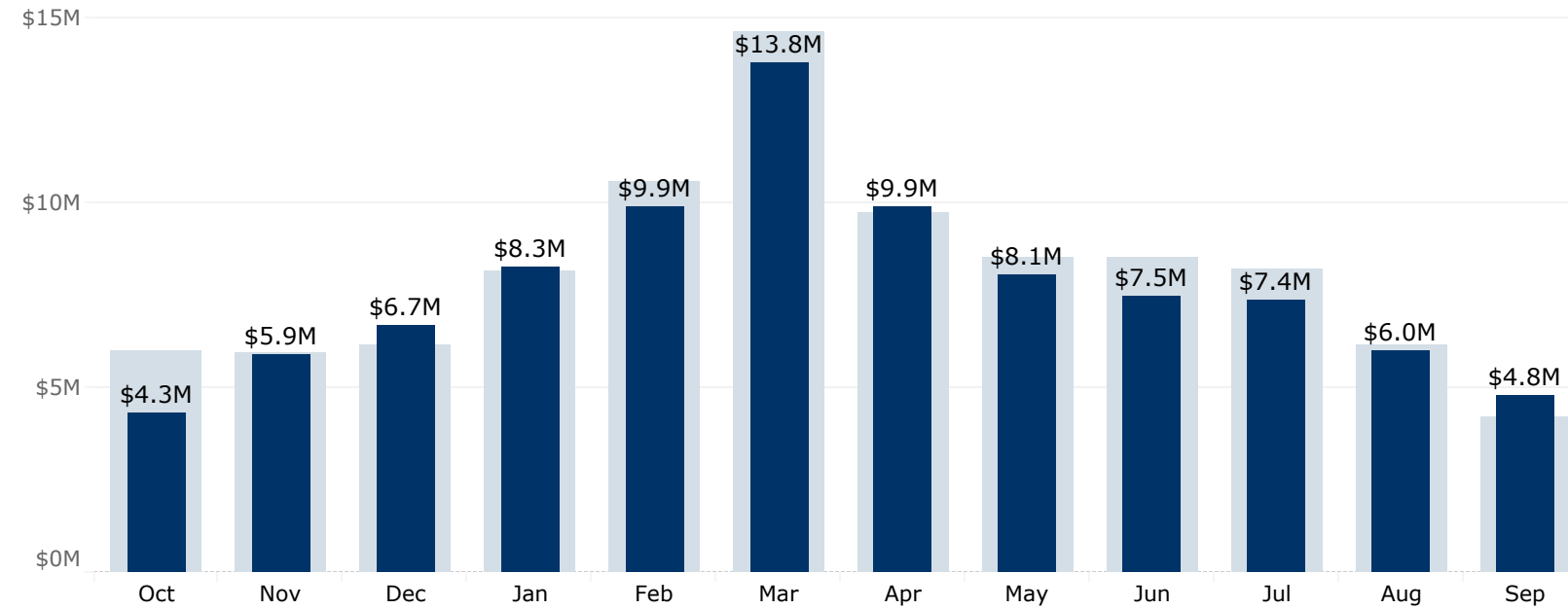
Fiscal Year '25

Tourist Development Tax Collections by Month

Fiscal Year 2025

Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
\$4.3M	\$5.9M	\$6.7M	\$8.3M	\$9.9M	\$13.8M	\$9.9M	\$8.1M	\$7.5M	\$7.4M	\$6.0M	\$4.8M
-28.1%	-0.8%	+8.6%	+1.6%	-6.3%	-5.9%	+1.6%	-5.1%	-12.2%	-9.8%	-2.0%	+14.7%

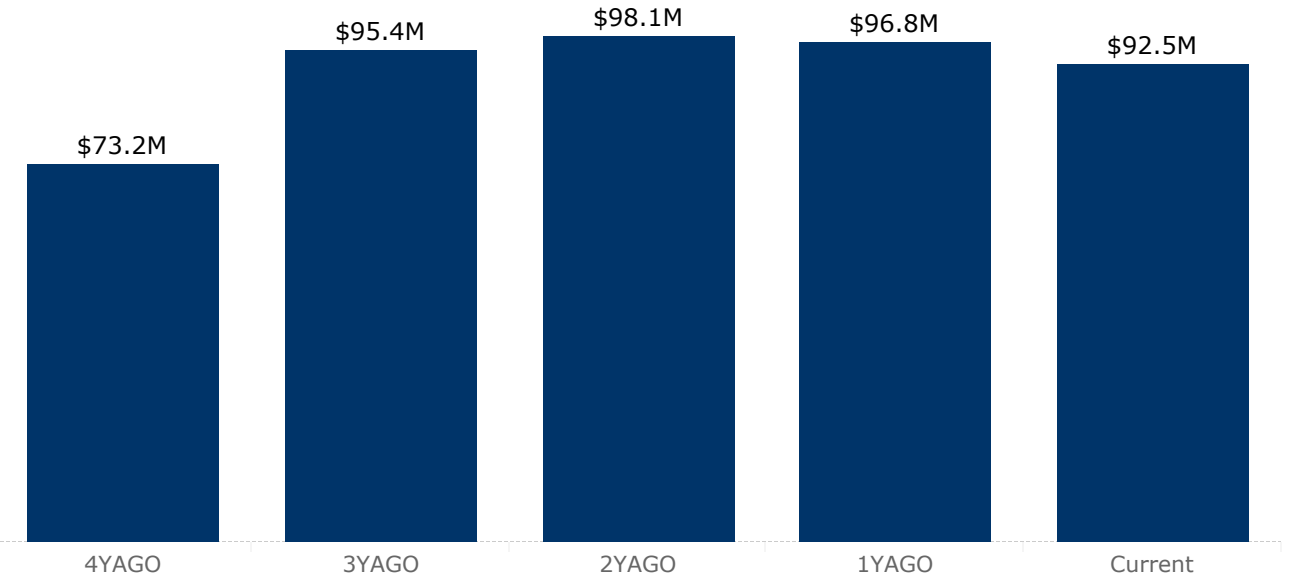
Current Last Year



Source: Pinellas County Tax Collector

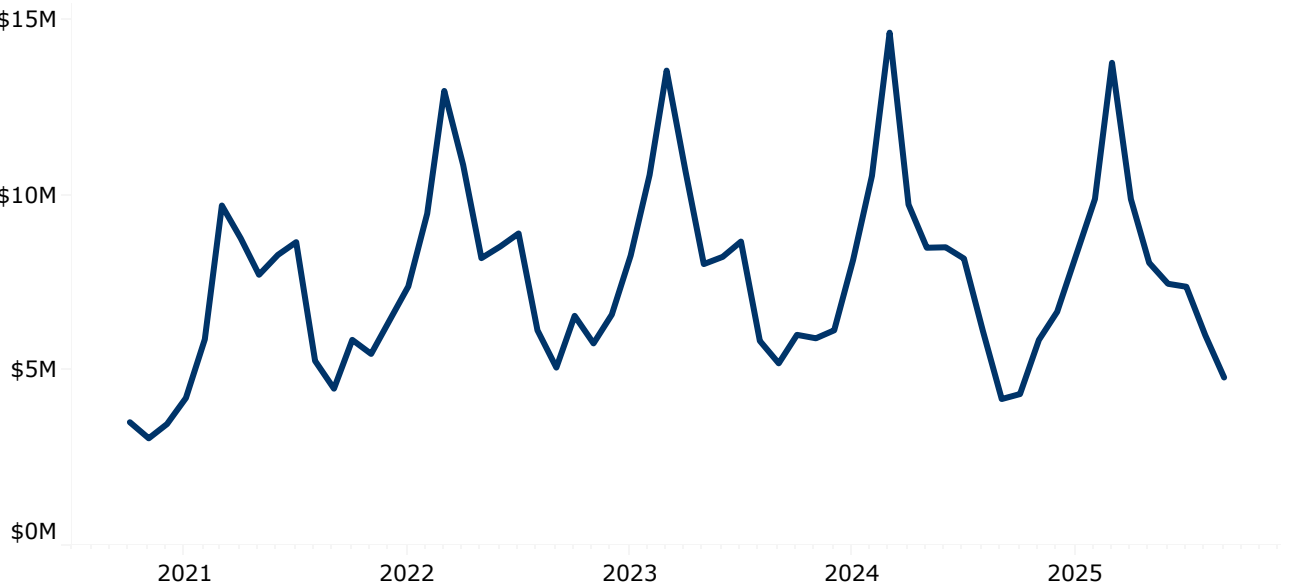
Tourist Development Tax Collections

Oct 2024 - Sep 2025 vs. comparable months over the past 5 years



Tourist Development Tax Collections

Long Term Trend



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