

Future Partners



Visit St. Pete-Clearwater Visitor Profile & Economic Impact Study

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Background & Overview

The overarching goal of this research is to create detailed profiles of Pinellas Co. visitors based upon key areas of interest, including travel planning resources, trip characteristics (e.g. reason for visiting, length of stay, place of stay, etc.), travel party composition, activities/attractions/areas visited, spending, satisfaction, and demographics.

This report represents the Q4 2025 (October-December) findings for the visitor profile research.



Methodology & Analysis

In total, 1,240 completed surveys from Pinellas Co. visitors were collected from October through December 2025. To be considered a visitor, respondents had to reside outside of Pinellas Co. The survey questionnaire was administered to persons at the following locations:

- Chihuly Collection
- Clearwater Beach
- Clearwater Marine Aquarium
- Dunedin
- Gulfport
- John's Pass Village & Boardwalk
- Pier 60
- Salvador Dali Museum
- St. Pete-Clearwater International Airport
- St. Pete Pier
- Sunken Gardens
- Tampa International Airport
- Tarpon Springs

The data presented in this report for all visitors is weighted based on the relative proportion of lodging guests, home share, VFR, and daytrip visitors observed in survey locations outside of lodging properties. Secondary inputs such as total hotel room inventory and average occupancy were also used in calculating these weights.

Economic Impact Analysis

Economic Impact & Tax Revenue: Definitions

The following definitions, as they relate to economic impact, are used throughout this report:

- **Direct Visitor Spending:** The injection of money into the local economy when a visitor purchases any good/service inside Pinellas Co.
- **Total Economic Impact:** The total change in economic activity in Pinellas Co. generated by direct spending. This includes direct visitor spending, as well as its induced and indirect effects in the county.
- **Tax Revenues Generated:** Tax revenues flowing to government coffers as a result of direct visitor spending.
- **Hotel Room Nights:** The estimated number of hotel room nights in Pinellas Co. generated by visitors.
- **Indirect Effects:** Changes in inter-industry transactions when supplying industries respond to increased demands from the directly affected industries (i.e., impacts from non-wage expenditures).
- **Induced Effects:** Changes in spending that result from income changes in the directly and indirectly affected industry sectors (i.e., impacts from wage expenditures; the subsequent round of spending made by employees of companies that incur direct and indirect expenditures).
- **Hotel Guests:** Visitors who stayed overnight in a Pinellas Co. hotel, motel, resort, or inn.
- **Visiting Friends/Relatives (VFRs):** Visitors who stayed overnight in the private residence of a friend/family member who lives in Pinellas Co.
- **Vacation Rental Guests:** Visitors who stayed overnight in a condo, vacation home or other private home rental in Pinellas Co.
- **Daytrip Visitors (regional):** Visitors who came for the day and reside in the regional area surrounding Pinellas Co.
- **Daytrip Visitors (travelers):** Visitors who came for the day, stayed overnight outside Pinellas Co. and reside outside the region.
- **Peer-to-Peer Home Share Guests:** Visitors who stayed overnight in a home share rental (i.e., AirBnB, VRBO, etc.) in Pinellas Co.
- **Other Guests:** Pinellas Co. visitors who stayed overnight in other types of lodging.

St. Pete-Clearwater Economic Impact Estimates Q4 2025

Key metrics showing the performance of the Pinellas County visitor industry are below:

Visitors to
Pinellas Co.



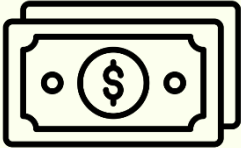
**3.3
Million**

Direct Visitor
Spending



\$1.4 Billion

Total Economic Impact



\$2.3 Billion

Taxes Revenues



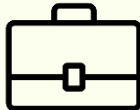
**\$85.5
Million**

Hotel Room
Nights



**1.4
Million**

Jobs Supported
by Visitor Industry*



21,947

**Note not all jobs supported by the visitor industry are located within Pinellas County.*

Tourism Industry
Payroll



**\$730
Million**

Economic Impact Estimates

The visitor volume to St. Pete-Clearwater in Q4 2025 (October-December) is estimated to have totaled 3,342,681. Additionally, it is estimated that visitors to the area during this timeframe generated nearly \$1.4 billion in direct spending and more than \$85 million in tax revenue for Pinellas Co. Note these figures are up notably compared to Q4 2024.

	Q1 2024 (Jan – Mar)	Q2 2024 (Apr – Jun)	Q3 2024 (Jul – Sep)	Q4 2024 (Oct – Dec)	Q1 2025 (Jan – Mar)	Q2 2025 (Apr – Jun)	Q3 2025 (Jul – Sep)	Q4 2025 (Oct – Dec)
Visitors to Pinellas Co.	4,109,415	4,186,292	3,660,466	3,193,620	4,182,333	4,076,126	3,477,920	3,342,681
Direct Visitor Spending in Pinellas Co.	\$1,978,345,214	\$1,790,441,335	\$1,522,209,001	\$1,312,115,741	\$1,781,389,264	\$1,621,904,446	\$1,357,454,956	\$1,353,210,898
Total Economic Impact of Tourism to Pinellas Co.	\$3,242,183,648	\$2,975,733,264	\$2,577,143,158	\$2,223,072,082	\$2,964,647,727	\$2,720,869,196	\$2,244,433,418	\$2,293,731,921
Tax Revenue Generated for Pinellas Co.	\$130,306,812	\$114,640,457	\$93,746,297	\$81,815,396	\$118,069,325	\$104,611,420	\$83,262,876	\$85,506,441
Hotel Room Nights	1,774,670	1,715,734	1,455,054	1,474,800	1,612,831	1,426,934	1,231,188	1,454,346
Tourism Industry Payroll	\$1,020,297,731	\$941,639,657	\$817,120,094	\$708,732,181	\$948,872,394	\$870,796,644	\$718,956,114	\$730,417,829
Jobs Supported	31,281	29,019	24,944	21,449	28,628	26,333	21,807	21,947

Economic Impact Estimates - by Visitor Type & Category

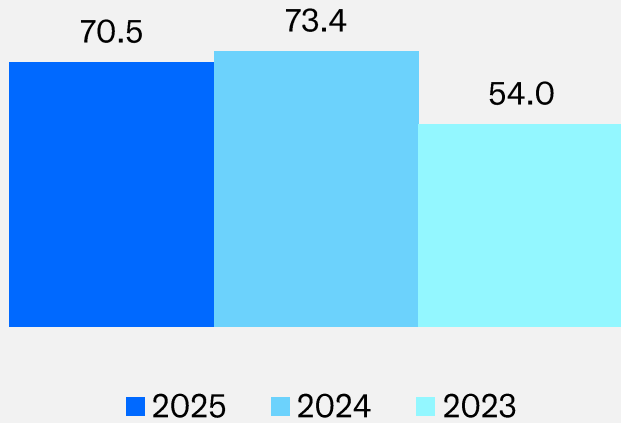
Q4 2025 (Oct - Dec)		
	Visitors	Direct Spend (thousands)
Hotel/ Motel/ B&B	859,438	\$731,350
Friends/ Relatives (VFR)	180,324	\$82,466
Vacation Rental	170,589	\$185,514
Day Trip (Regional)	1,003,389	\$98,173
Day Trip (Traveler)	963,965	\$101,468
Peer-to-Peer	155,702	\$152,148
Other	9,274	\$2,092
Total Visitors	3,342,681	\$1,353,211

Q4 2025 (Oct - Dec)	
	Category Spend (thousands)
Lodging/ Accommodations	\$511,860
Restaurants/ Dining	\$396,606
Retail/ Shopping	\$198,764
Entertainment/ Sightseeing	\$180,694
Local Transportation	\$37,502
Car Rental	\$26,348
Other	\$1,436
Total Direct Spending	\$1,353,211

Visitor Summary: Year-over-Year

Year-over-Year Comparisons for Q4

Average Days Between Decision to Visit & Arrival



Travel Party Size



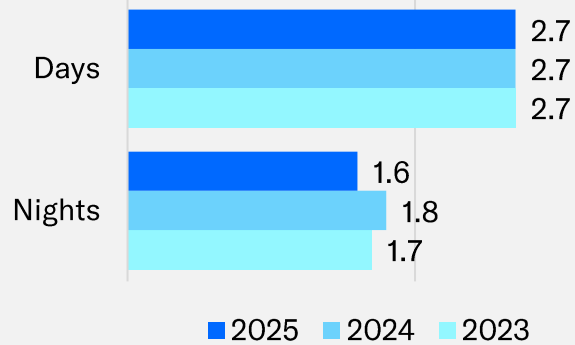
3.3

2025

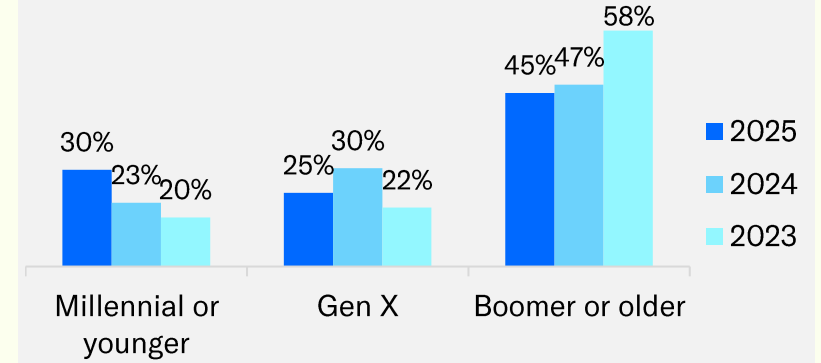
2024 2.8

2023 2.5

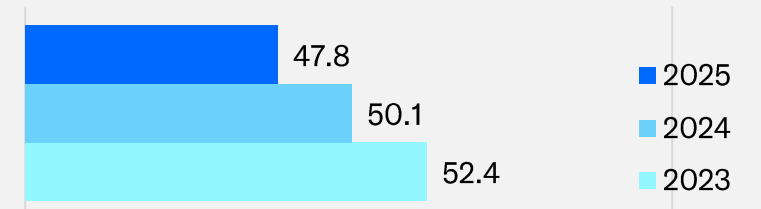
Average Days & Nights



Generation



Average Age



Average Daily Spending Per Travel Party



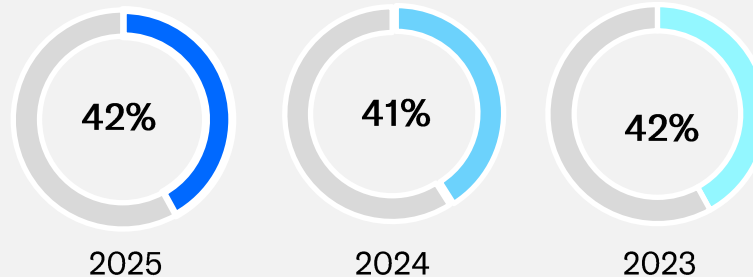
\$329

2025

2024 \$312

2023 \$270

Overnight in Pinellas Co.



Average Household Income

\$105,022

2025

2024 \$105,058

2023 \$87,749

Infographic: Traveler Segments

Beach-goer

Important Factors for Destination Selection



Average Daily Spending Per Travel Party



\$366

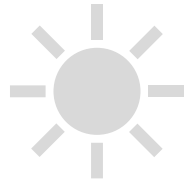
Travel Party Size



3.3

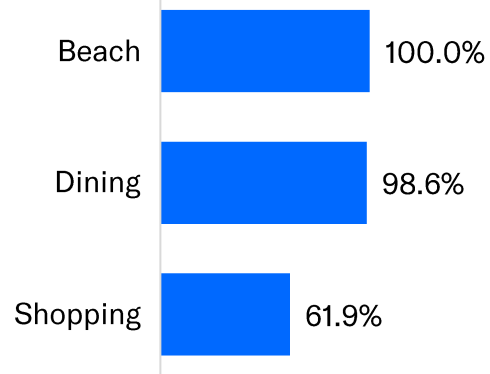
31.3% traveled with children

Average Length of Stay

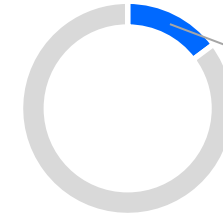


3.7 days

Top Activities



International Visitation



International
14.8%

Origin States



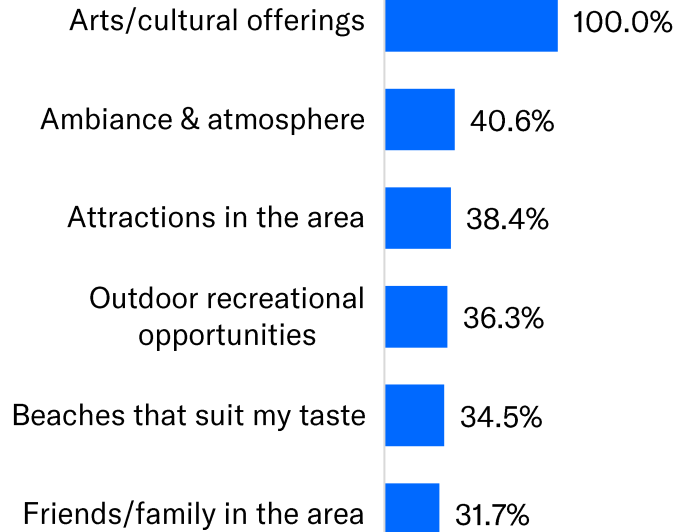
Communities Visited



Community	Percentage
Clearwater Beach	62.2%
Madeira Beach	54.9%
Clearwater	49.2%
Tarpon Springs	47.1%
St. Petersburg	44.8%

Arts & Culture Visitor

Important Factors for Destination Selection



Average Daily Spending Per Travel Party



\$312

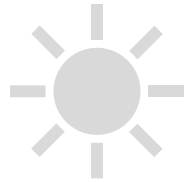
Travel Party Size



3.8

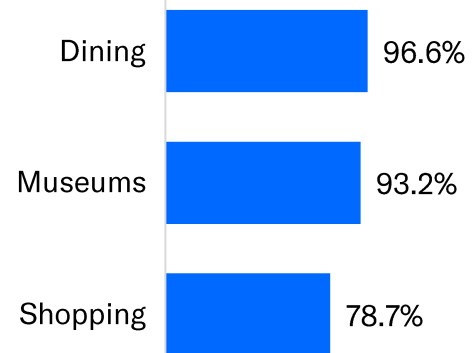
11.3% traveled with children

Average Length of Stay

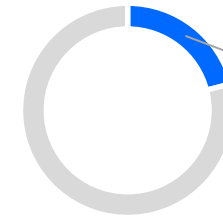


2.2 days

Top Activities

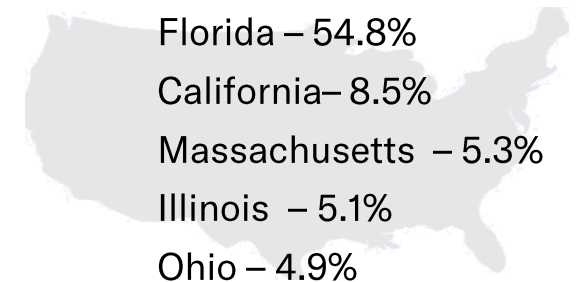


International Visitation



International
21.0%

Origin States



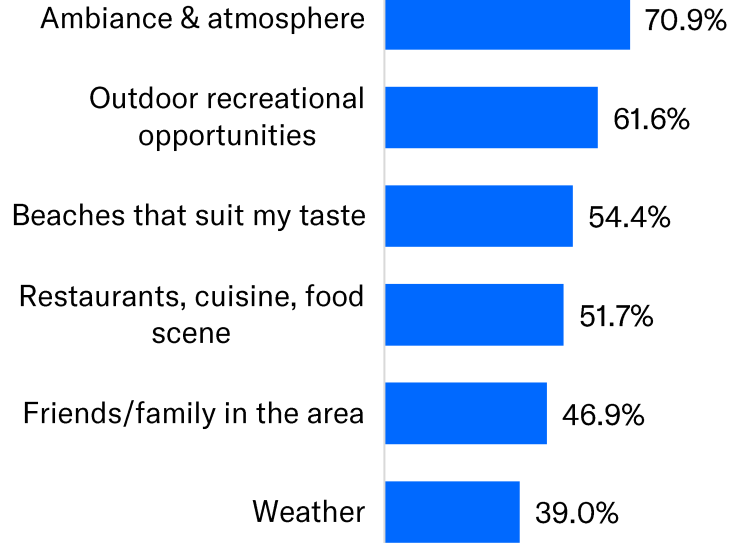
Communities Visited



St. Petersburg	76.5%
Tarpon Springs	35.9%
Clearwater Beach	31.9%
Clearwater	31.1%
Madeira Beach	26.1%

Affluent Traveler

Important Factors for Destination Selection



Average Daily Spending Per Travel Party



\$436

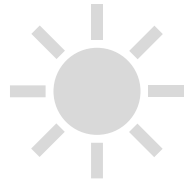
Travel Party Size



2.9

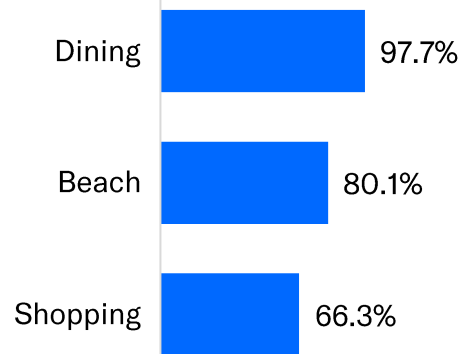
15.7% traveled with children

Average Length of Stay

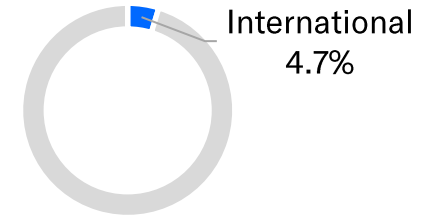


3.6 days

Top Activities



International Visitation



Origin States



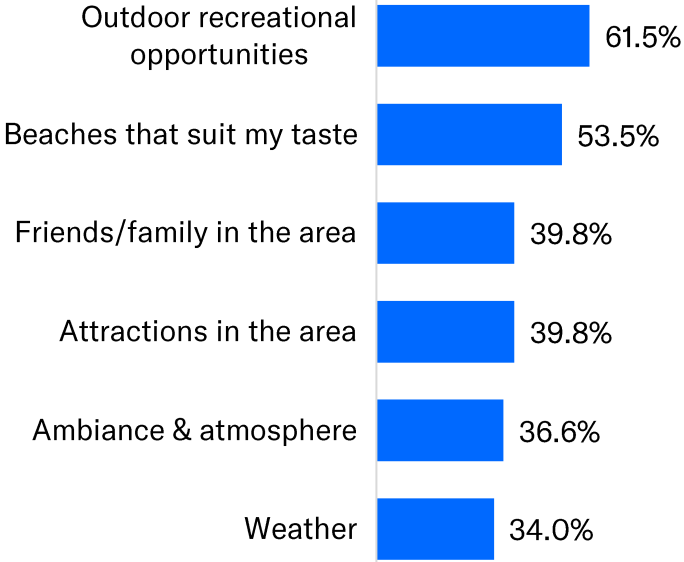
Communities Visited



- Clearwater Beach - 52.0%
- Clearwater - 51.6%
- St. Petersburg - 50.6%
- Tarpon Springs - 46.9%
- Madeira Beach - 43.7%

Family Traveler

Important Factors for Destination Selection



Average Daily Spending Per Travel Party



\$356

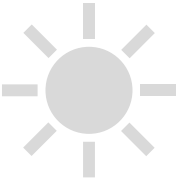
Travel Party Size



4.5

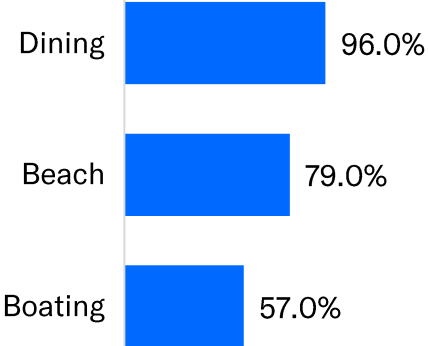
100% traveled with children

Average Length of Stay

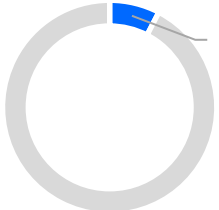


3.0 days

Top Activities



International Visitation



International
7.6%

Origin States



Communities Visited

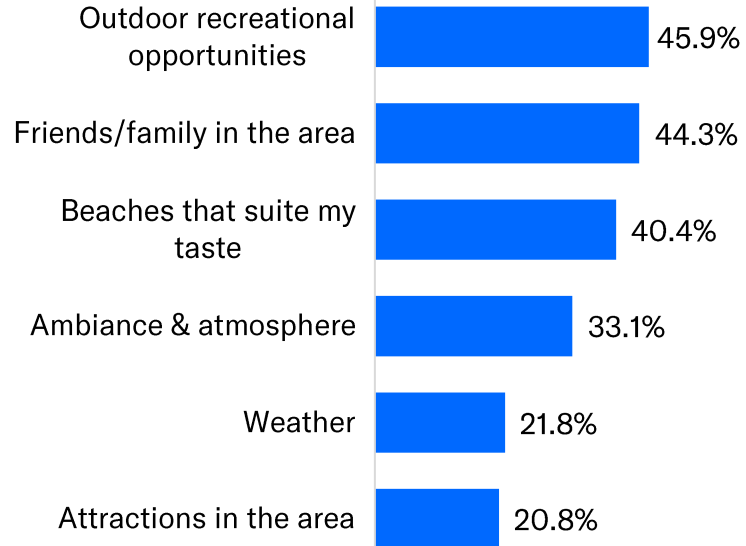


- Clearwater Beach – 55.9%
- Clearwater – 49.9%
- St. Petersburg – 43.7%
- Tarpon Springs – 40.3%
- Madeira Beach – 35.5%

Infographic: Generations

Millennial Travelers

Important Factors for Destination Selection



Average Daily Spending Per Travel Party



\$338

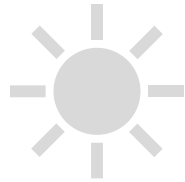
Travel Party Size



3.5

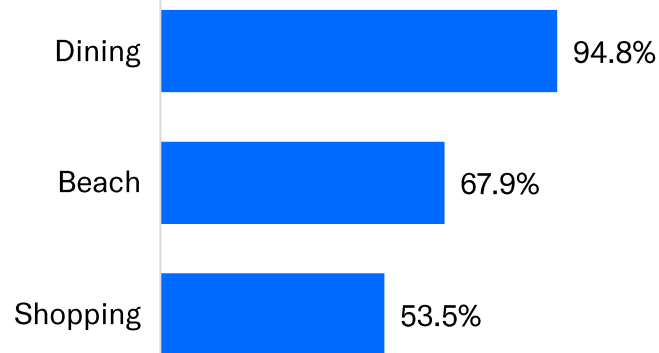
45.1% traveled with children

Average Length of Stay

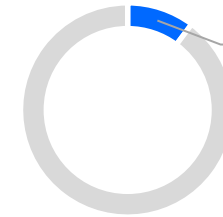


2.6 days

Top Activities



International Visitation



International
10.2%

Origin States



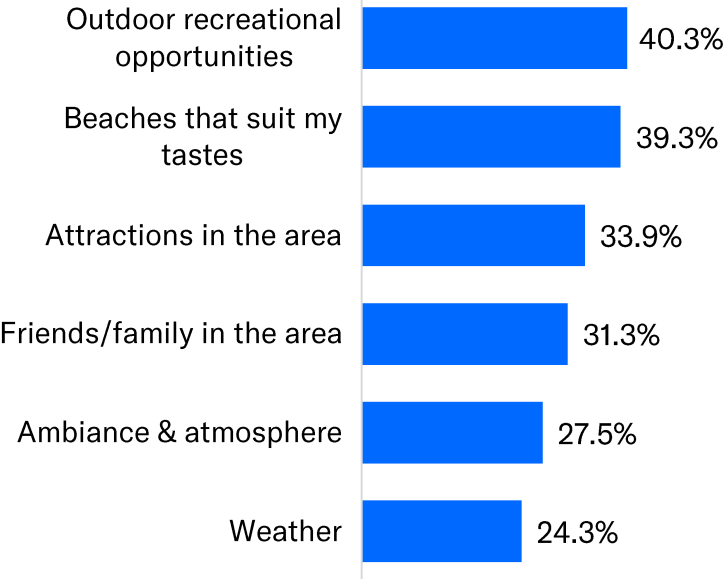
Communities Visited



St. Petersburg	49.5%
Clearwater Beach	44.9%
Clearwater	30.6%
Tarpon Springs	27.8%
Madeira Beach	25.9%

Gen X Travelers

Important Factors for Destination Selection



Average Daily Spending Per Travel Party



\$372

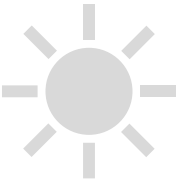
Travel Party Size



3.2

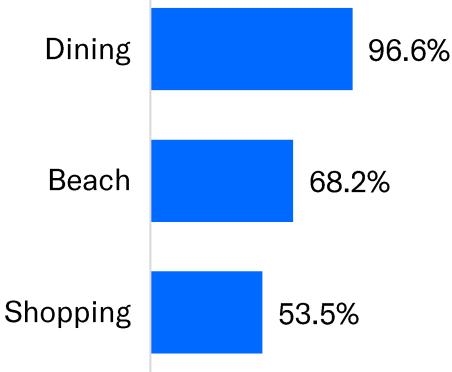
27.7% traveled with children

Average Length of Stay

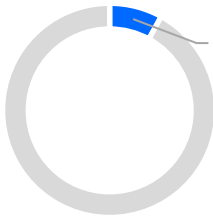


3.2 days

Top Activities

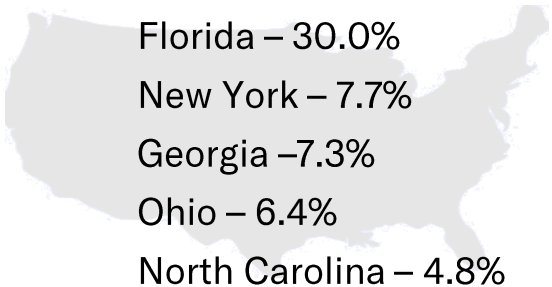


International Visitation



International
8.0%

Origin States



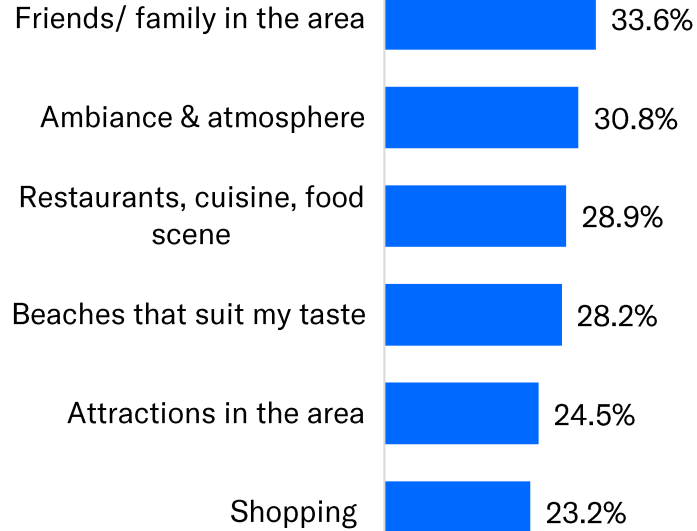
Communities Visited



- St. Petersburg – 52.7%
- Clearwater Beach – 40.5%
- Madeira Beach – 36.8%
- Tarpon Springs – 34.3%
- Clearwater – 33.6%

Boomer Travelers

Important Factors for Destination Selection



Average Daily Spending Per Travel Party



\$311

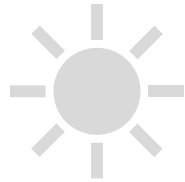
Travel Party Size



3.2

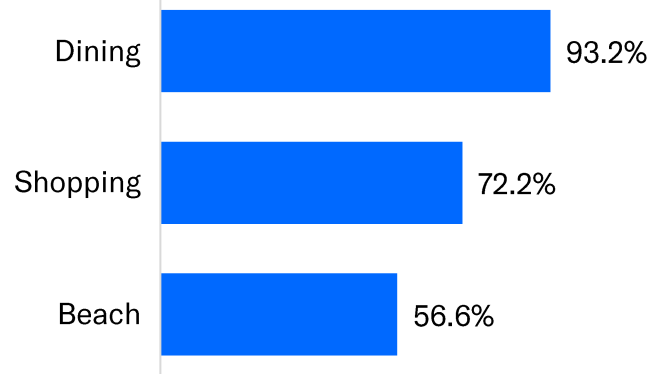
1.1% traveled with children

Average Length of Stay

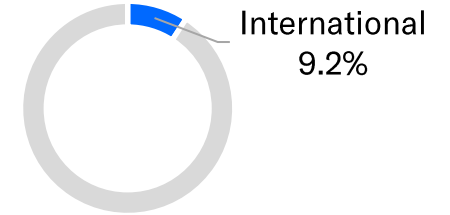


2.6 days

Top Activities



International Visitation



Origin States



Communities Visited



- St. Petersburg – 55.6%
- Madeira Beach – 32.8%
- Clearwater Beach – 28.5%
- Clearwater – 24.9%
- Tarpon Springs – 19.8%

Detailed Findings: Trip Planning

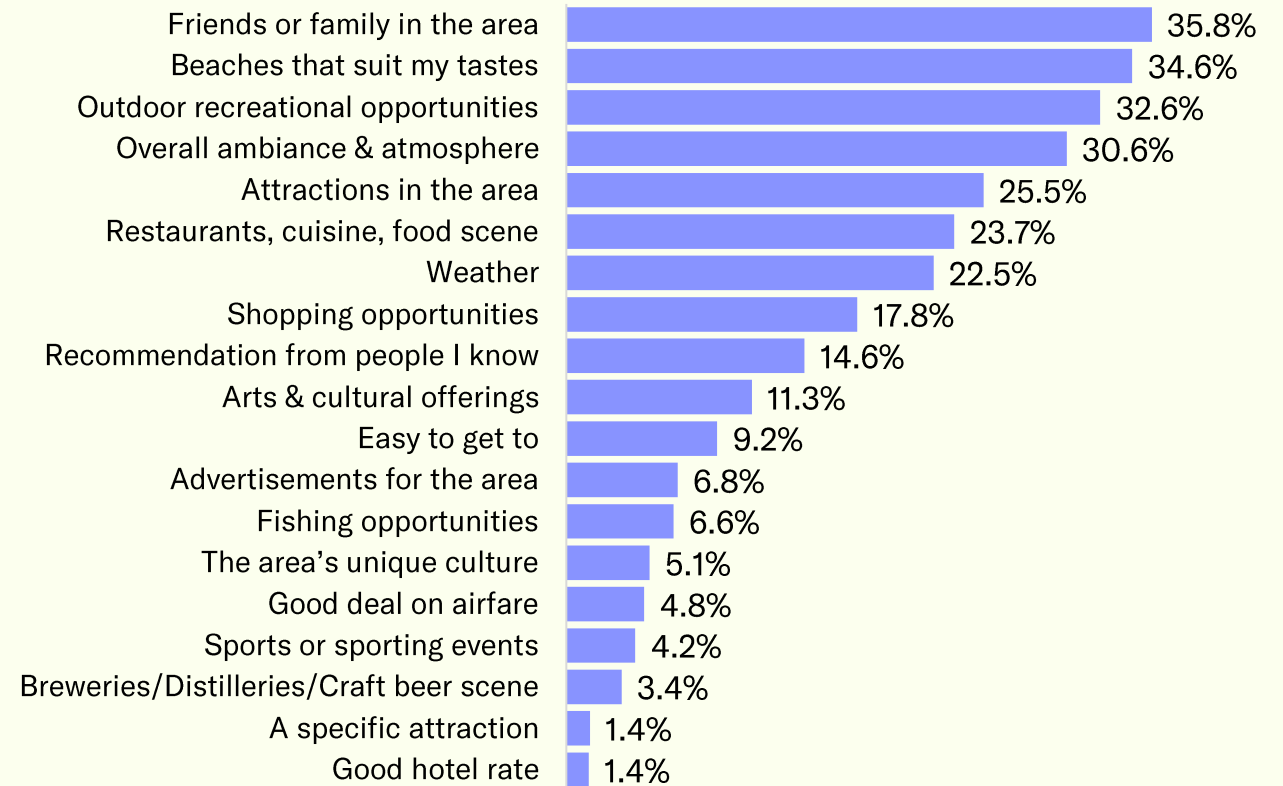
Visitors made the decision to visit St. Pete-Clearwater just over ten weeks prior to arrival.

Visitors averaged 70.5 days between their decision and their actual visit, down by 3 days from Q4 2024 (73.4 days). Reasons for visiting shifted somewhat YoY, with friends/family in the area jumping to the top of the list (35.8% from 28.1% a year ago). Beaches that suit my tastes (34.6%), outdoor recreation (32.6%), overall ambiance (30.6%), and area attractions (25.5%) rounded out the top five motivations.

Decision-making Timeframe



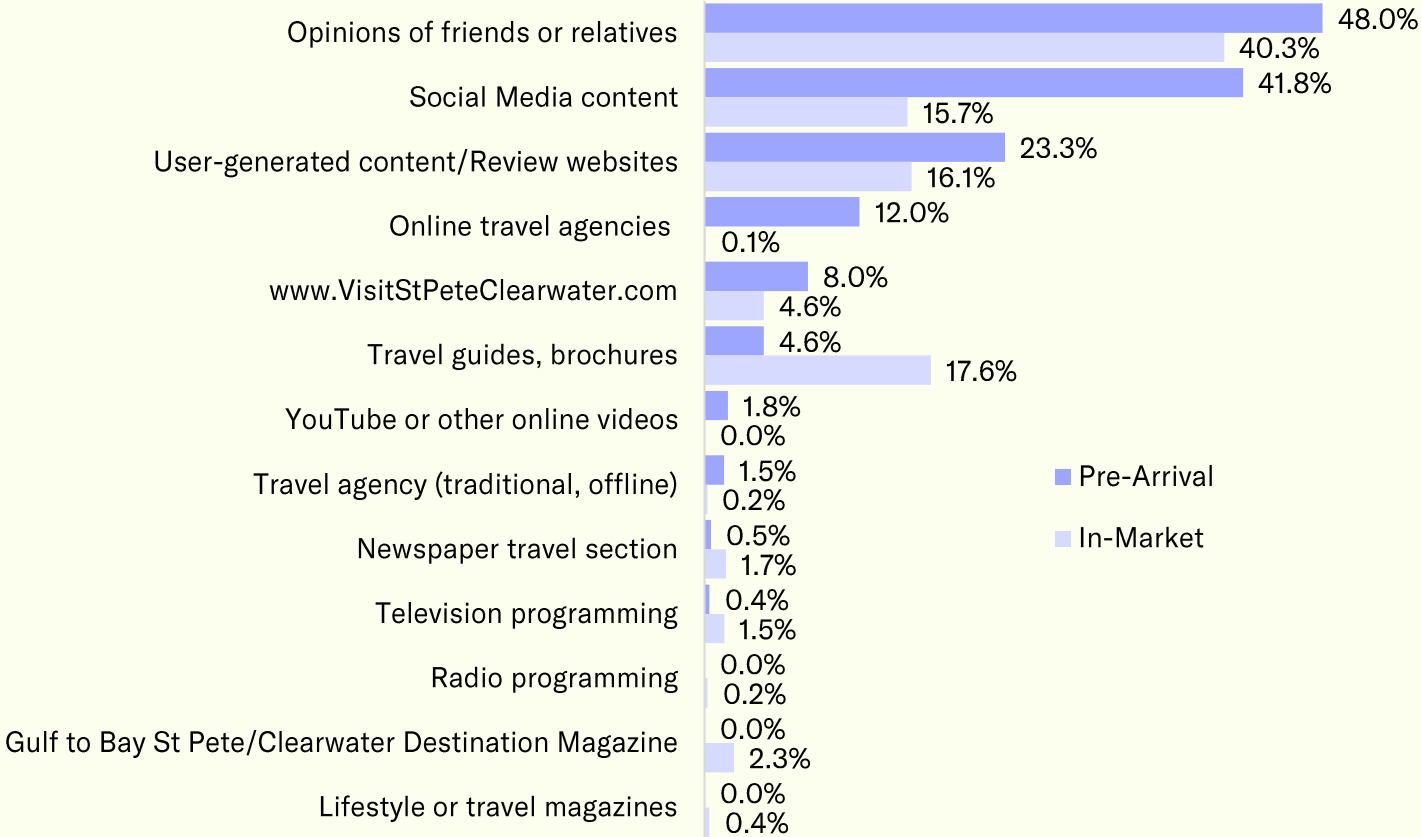
Reasons for Visiting St. Pete-Clearwater



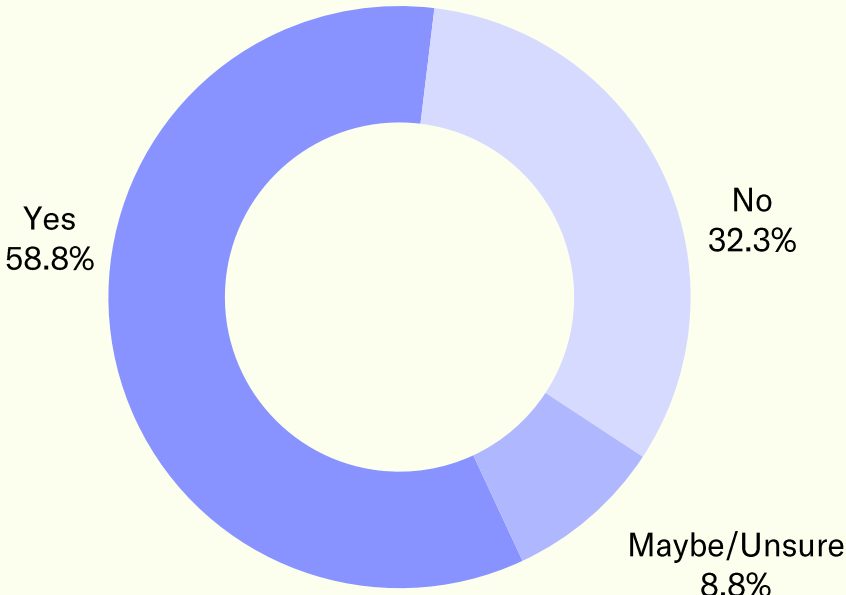
Aside from the opinions of friends/relatives, the most used planning resources pre-arrival were social media and user generated content.

In addition, one-in-twelve (8.0%) Q4 2025 visitors used the VSPC website to plan their trip, up from a year ago (6.9%). Once in-market, visitors often turn to travel guides/brochures (17.6%). A majority (58.8%) of visitors in Q4 2025 to St. Pete-Clearwater recalled VSPC advertising

Travel Planning Resources Used



Media Recall



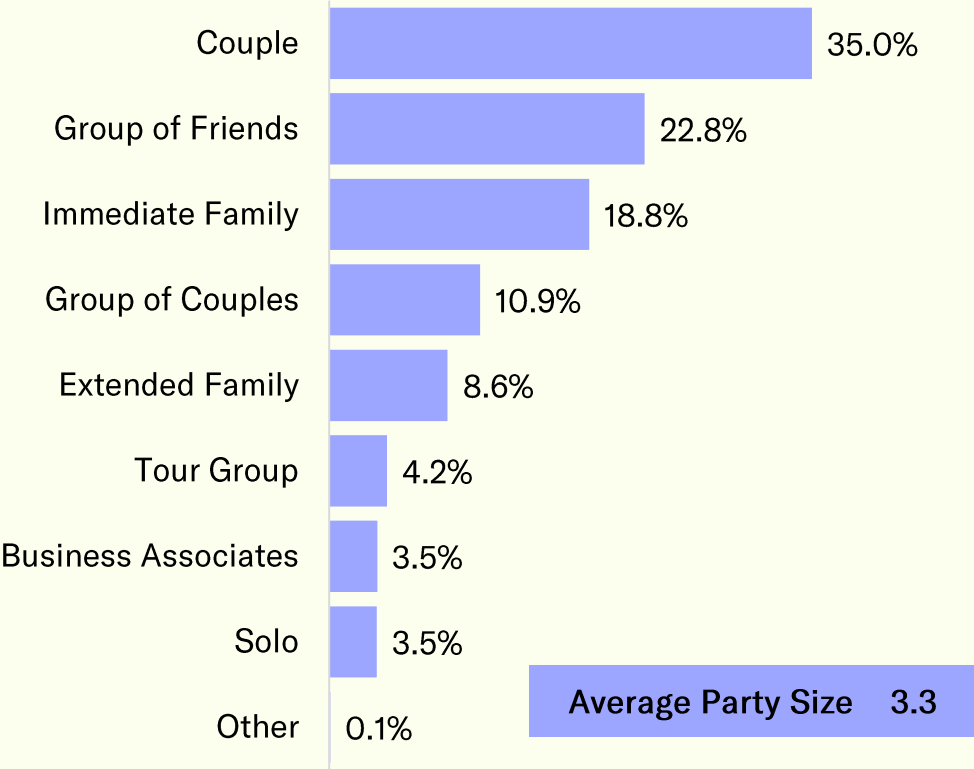
Question: Which of the following resources did you use to plan your trip to the St. Pete/Clearwater area BEFORE you arrived, and which did you (or do you plan to) use while IN the area for this trip? (Select all that apply.)
 Question: In the last six months, have you seen, read, or heard any travel stories, advertising, or promotions for the St. Pete/Clearwater area?
 Base sizes: Total visitors (1,223 - 1,240).

Detailed Findings: Trip Details

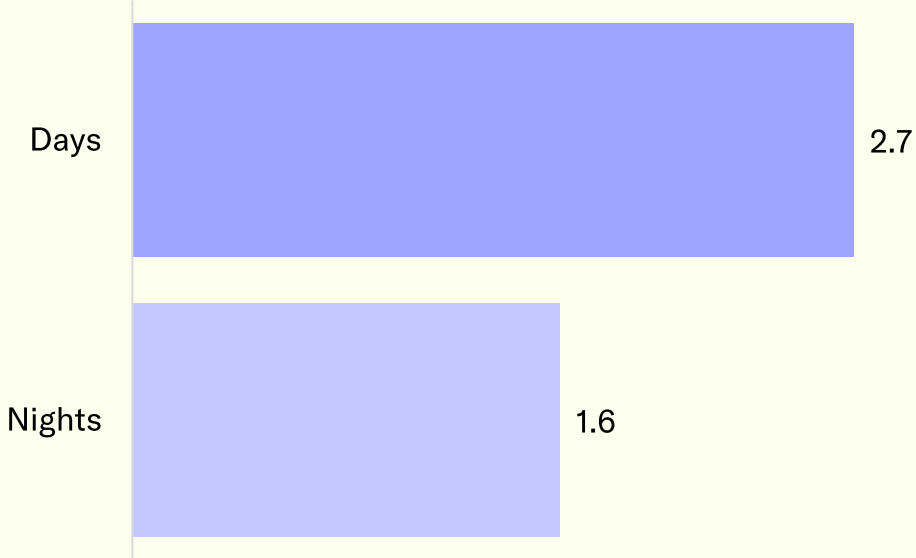
Most visitors to St. Pete-Clearwater travel as a couple, with groups of friends, or with their immediate family.

The average travel party size grew to 3.3 (up from 2.8 in Q4 2024) with an average length of stay of 2.7 days and 1.6 nights. For travel party composition, couples and group of friends represented similar shares as last year, while those visiting with immediate family declined slightly (to 18.8% from 21.3%).

Travel Party Composition



Length of Stay



Question: Which best describes your travel group on this trip? Are you...?

Question: How many people of each type are in your immediate travel party, including yourself?

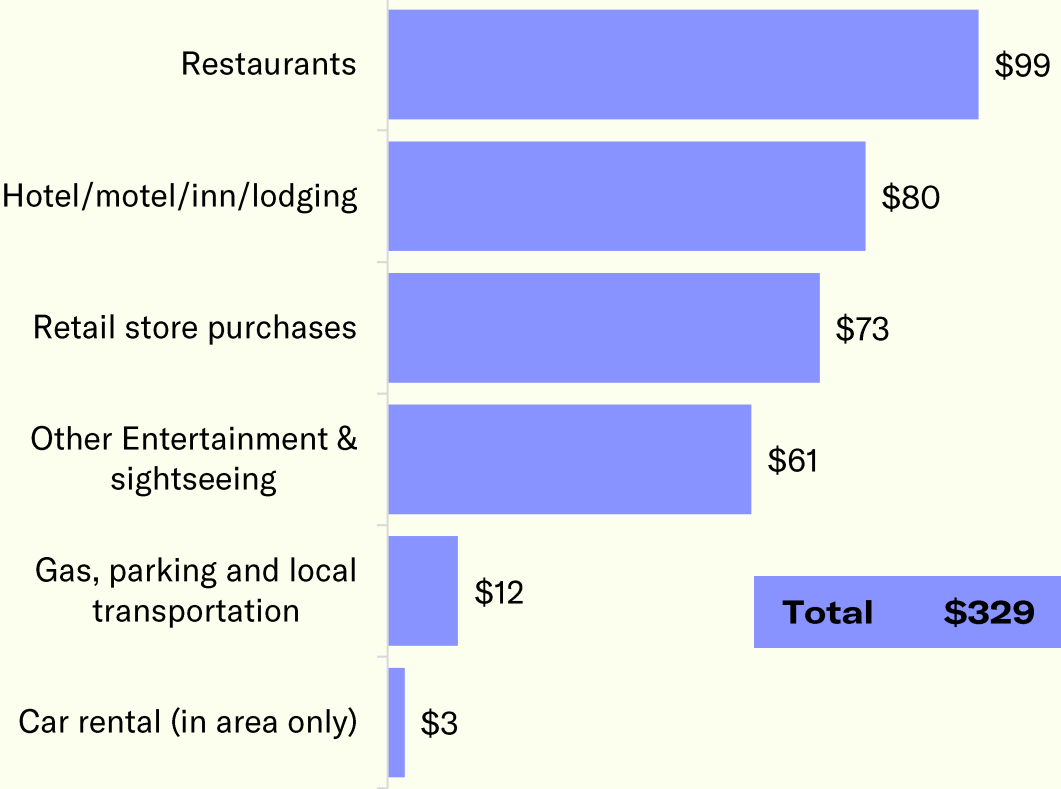
Question: How many total days and nights did you, or will you, stay in the St. Pete/Clearwater area on this trip?

Base sizes: Total visitors (1,185 – 1,240).

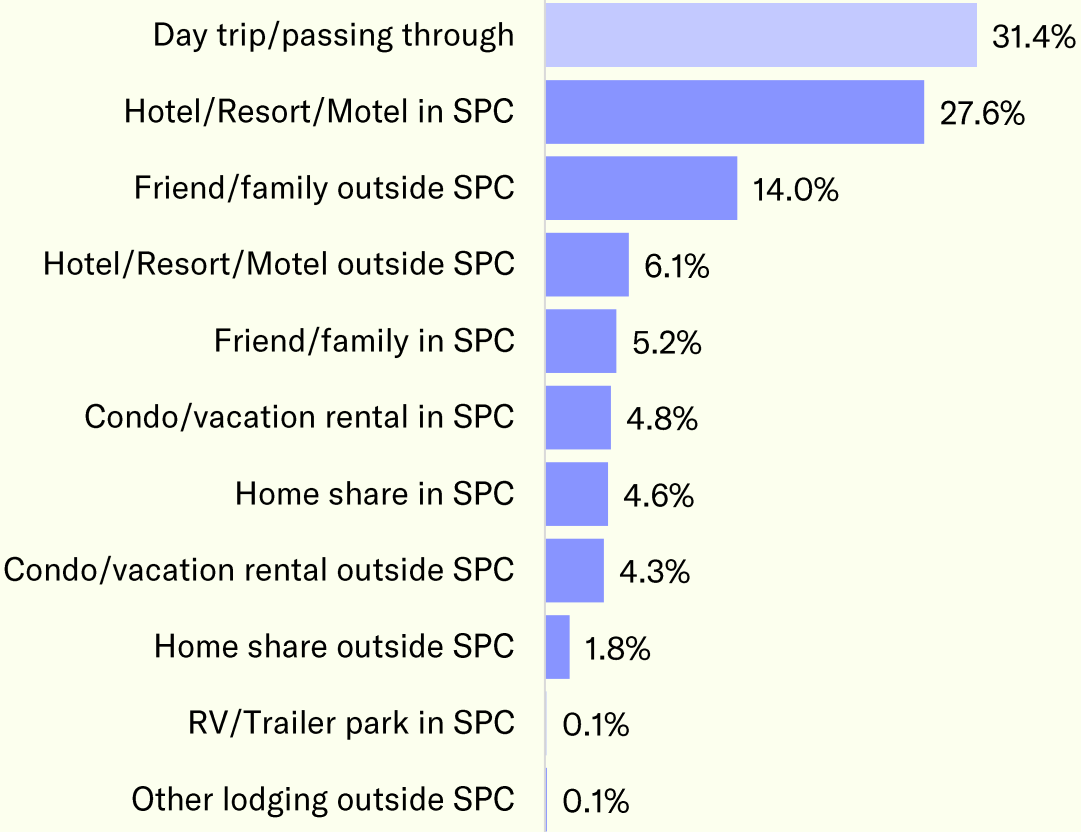
Visitors spent an average of \$329 per day, with restaurants, lodging, and retail store purchases as the largest expenses.

Average in-market spending grew YoY (up from \$312). Staying in a hotel/resort/motel in St. Pete-Clearwater remained the most popular option (up to 27.6% from 25.4% in Q4 2024) followed by staying with friends/relatives outside the county (down 1pp from 15.0% in Q4 2024).

Average Daily Spend per Party



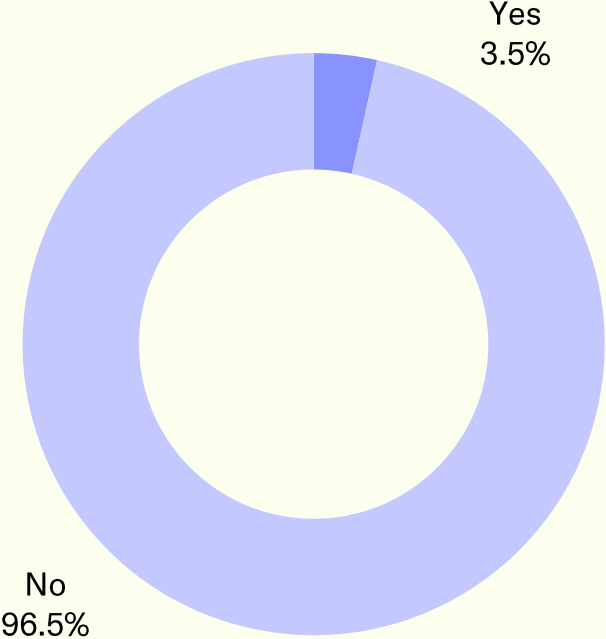
Lodging/Accommodations



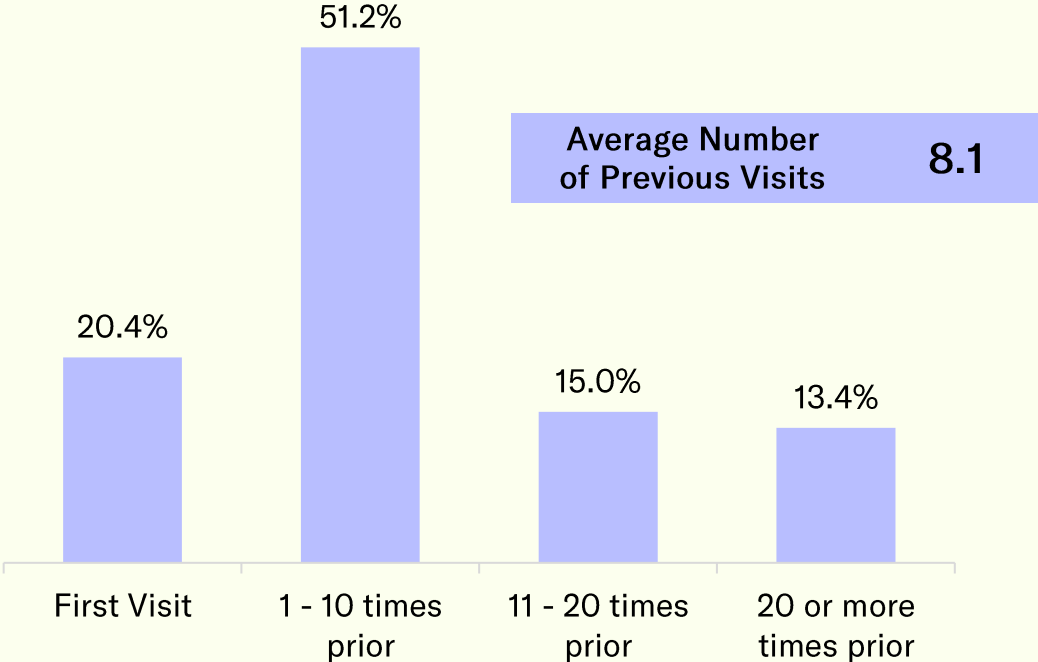
Most visitors had been to Florida previously (96.5%). The average St. Pete-Clearwater visitor made 8.1 prior trips to the area.

The number of repeat visits has held steady year-over-year (was 8.5 in Q4 2024). However, first-time visitors to the St. Pete-Clearwater area grew YoY, up 3pp to 20.4% of visitors in Q4 2025 from 17.4% in Q4 2024.

First Visit to Florida



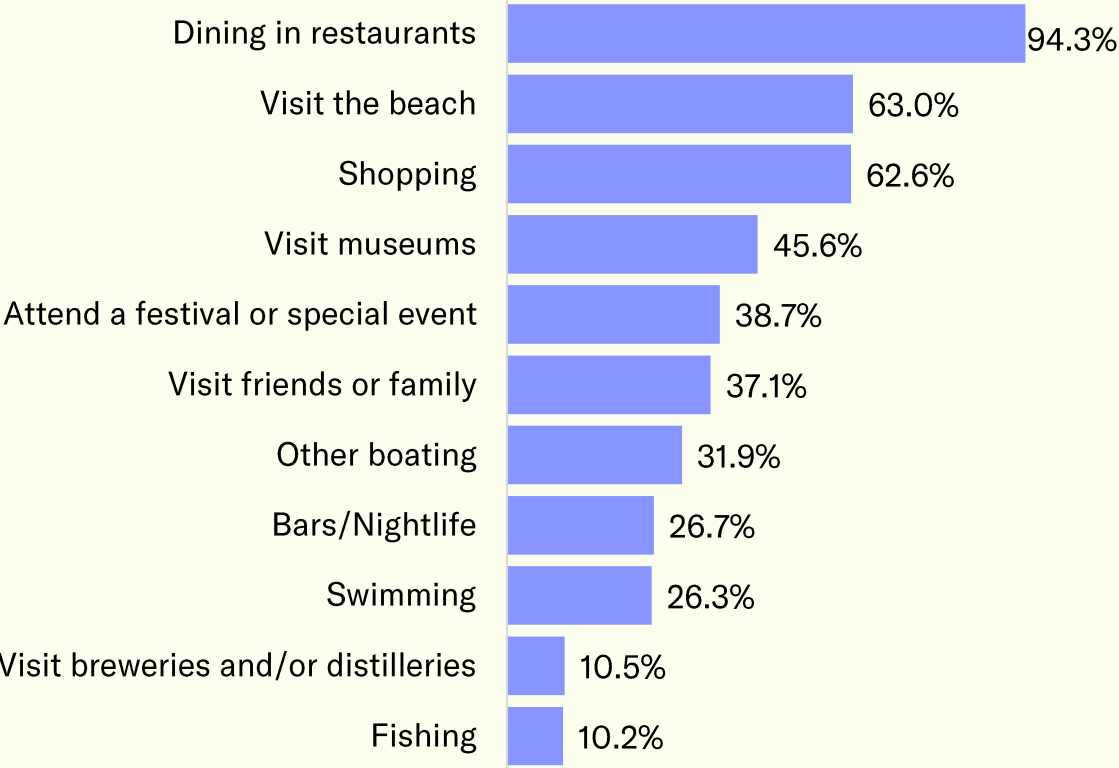
Previous Visitation to St. Pete-Clearwater



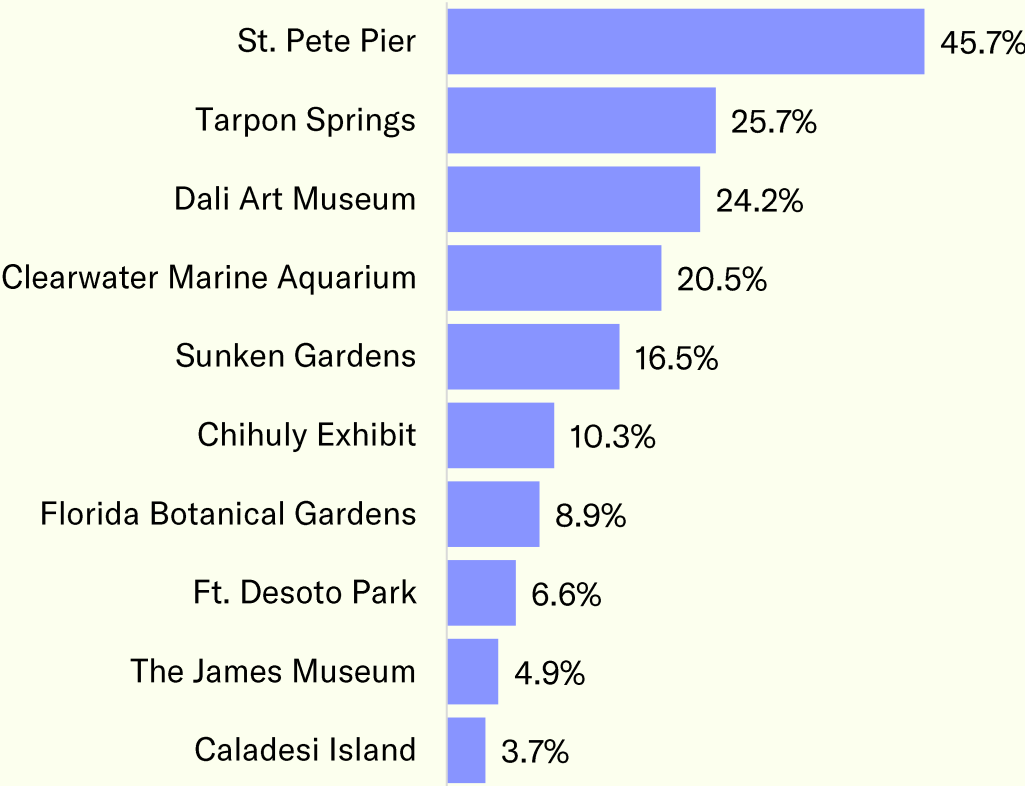
Dining in restaurants, visiting the beach, and shopping remained the most popular visitor activities in St. Pete-Clearwater.

In terms of attractions, the St. Pete Pier continues to dominate, while Tarpon Springs visitation grew more than 10pp YoY to overtake the Dali Art Museum in popularity. The Clearwater Marine Aquarium climbed 4pp in visitation YoY, while the Chihuly Exhibit dropped by more than 6 pp compared to Q4 2024.

Top 10 Trip Activities



Top 10 Attractions Visited



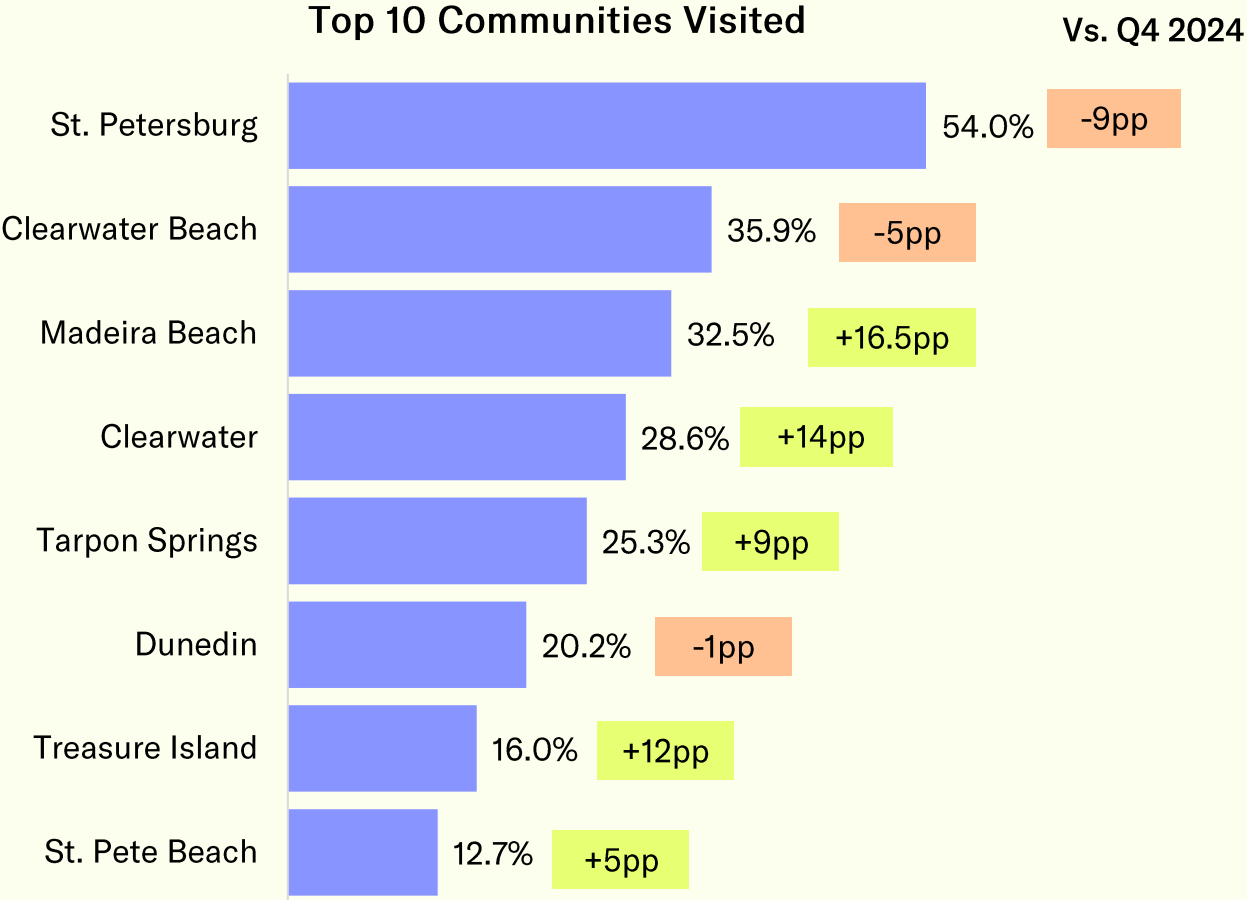
Question: Which of these activities did you, or will you, participate in while in the St. Pete/Clearwater area? (Select all that apply)

Question: Which of these attractions did you (or will you) visit while on this trip? (Select all that apply)

Base sizes: Total visitors (1,233).

St. Petersburg was the most visited area, followed by Clearwater Beach and Madeira Beach.

That said, there is a notable shift in visitor disbursement throughout the county. While visitation to many communities grew compared to Q4 2024, especially Madeira Beach (+16.5pp), Clearwater (+14pp), and Treasure Island (+12pp), the top two communities (St. Petersburg and Clearwater Beach) saw YoY declines in visitation (-9pp and -5pp, respectively).



Question: Which of the following communities in the St. Pete/Clearwater area did you visit? (Select all that apply)
 Base size: Total visitors (1,233).

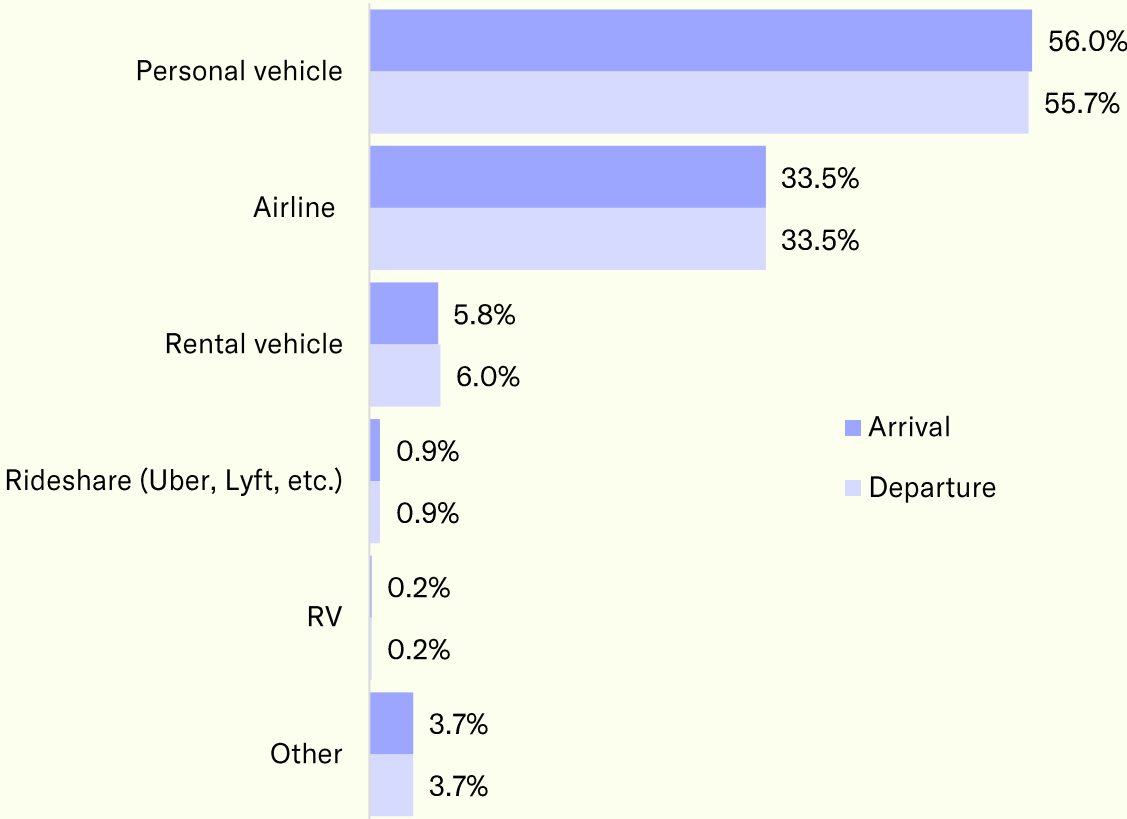
More than half of visitors to St. Pete-Clearwater came for a vacation. Combined, visiting friends/family and special events attracted almost another third.

The reasons for visiting ranked similarly to a year ago, though attending a sports event declined -3pp compared to Q4 2024. As for mode of transportation, personal car/vehicle remained the leading method of arrival and departure from the area.

Primary Reason for Visit

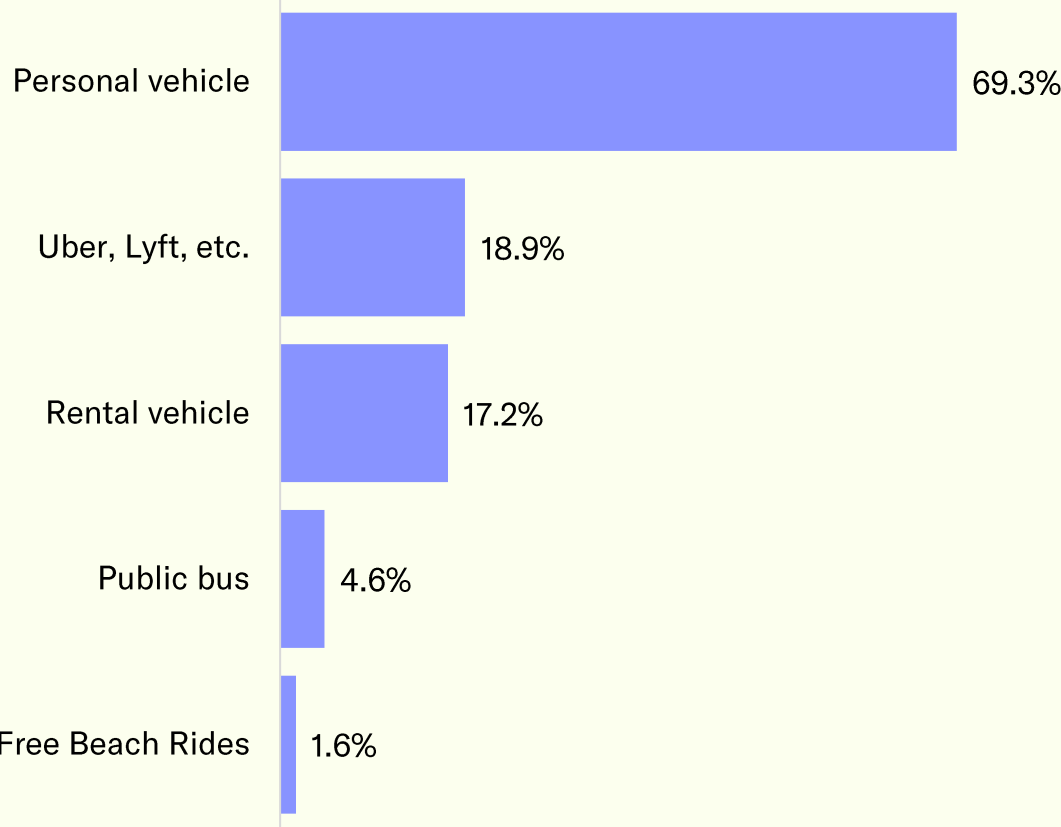


Method of Arrival & Departure



Most visitors used a personal car/vehicle to travel within the area.

In-Market Transportation Used



Question: Which modes of transportation did you, or will you, use while in the St. Pete/Clearwater area?

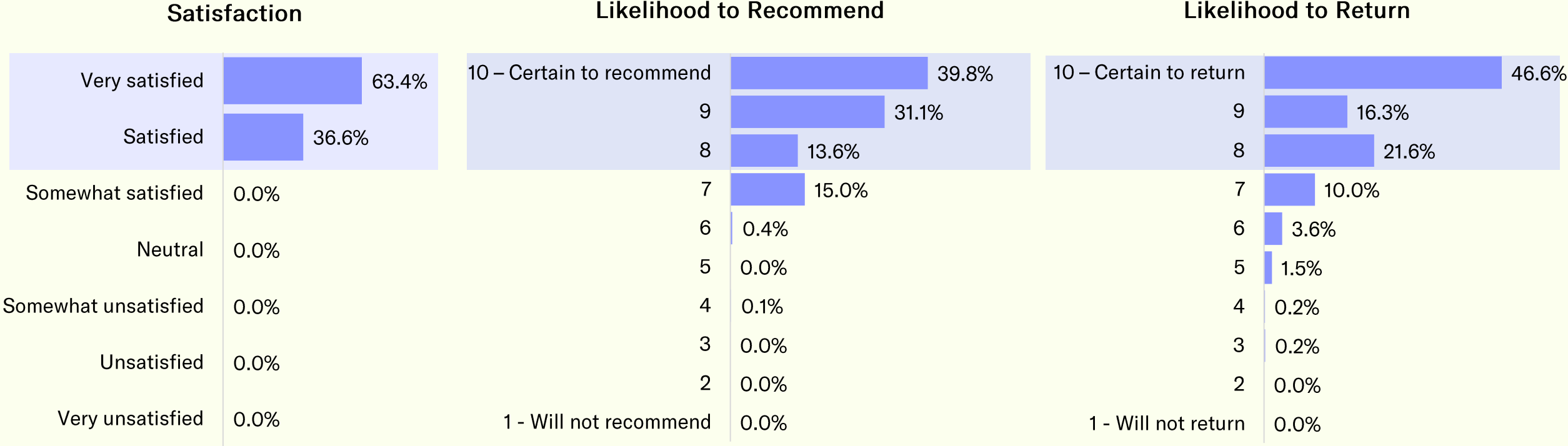
Base sizes: Total visitors (1,234)



Detailed Findings: Visitor Satisfaction

Visitors continue to be very satisfied with St. Pete-Clearwater, very likely to recommend the area to friends/family (84.5%), and to return to the destination themselves (84.5%).

Importantly, top-box scores for satisfaction (63.4%) grew YoY (up from 61.0% in Q4 2024). Further, top-box scores for likelihood to recommend and likelihood to return also improved slightly YoY (recommend +1pp and return +2pp compared to Q4 2024).



Question: How satisfied are you with your experience in the St. Pete/Clearwater area on this trip?
 Question: How likely are you to recommend the St. Pete/Clearwater area as a place to visit to other travelers?
 Question: How likely are you to return to the St. Pete/Clearwater area?
 Base size: Total visitors (1,223).

When describing their feelings while visiting St. Pete-Clearwater, roughly one-in-five felt relaxed and/or energized. Nearly as many felt entertained.



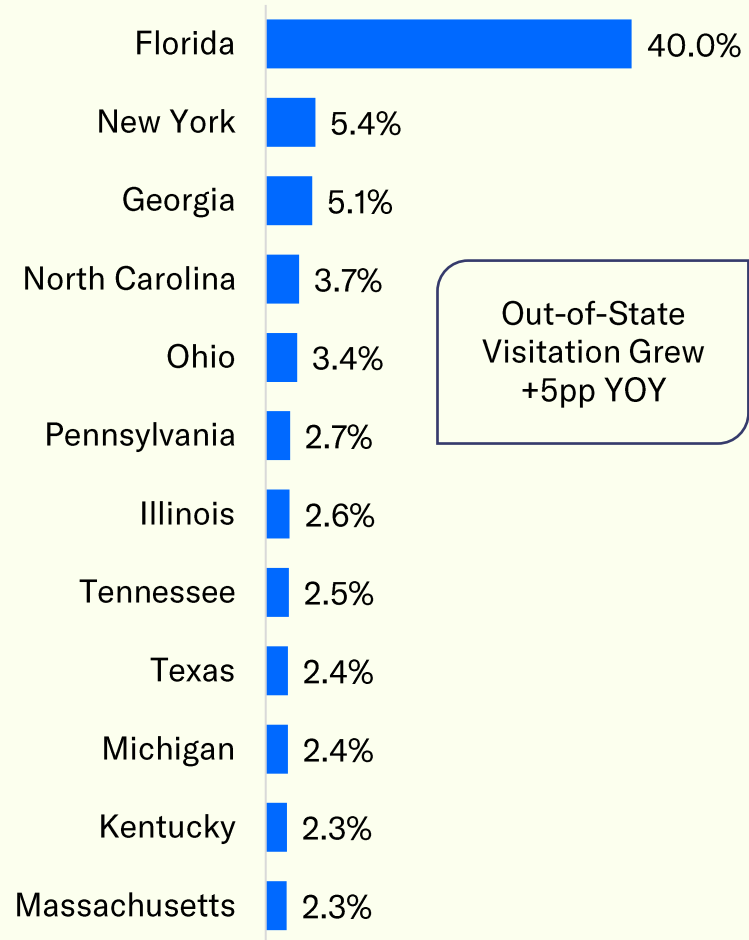
Demographics

Origin Market

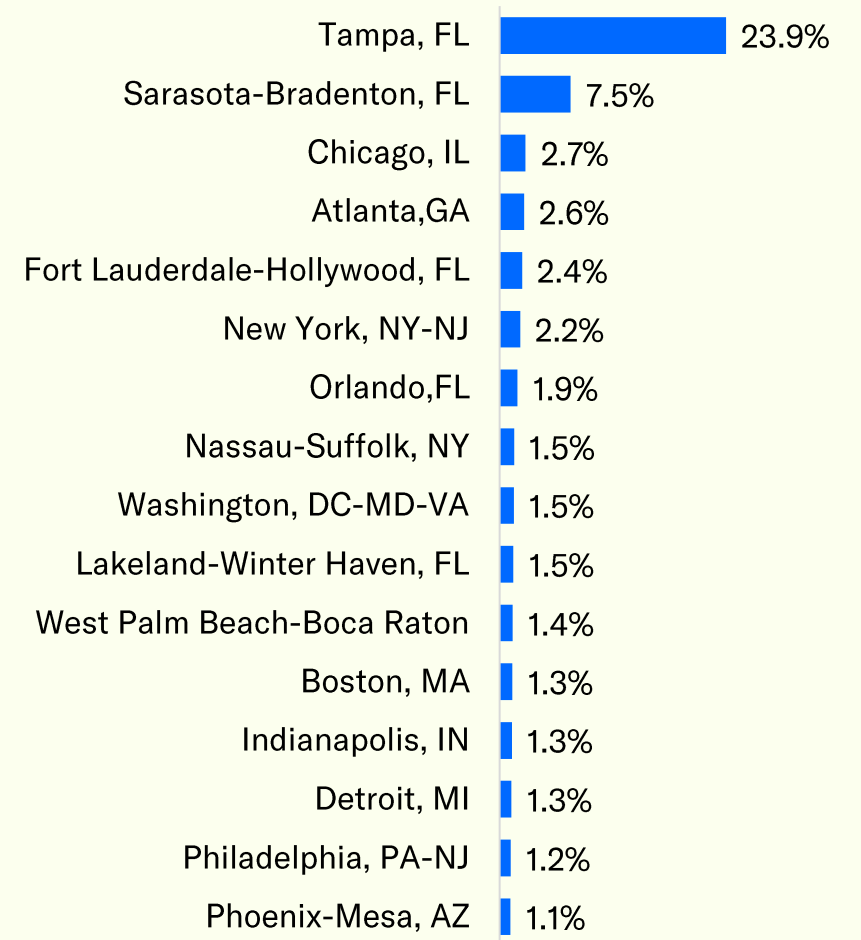
Country of Origin



Top U.S. State of Origin



Top MSA of Origin



Demographics

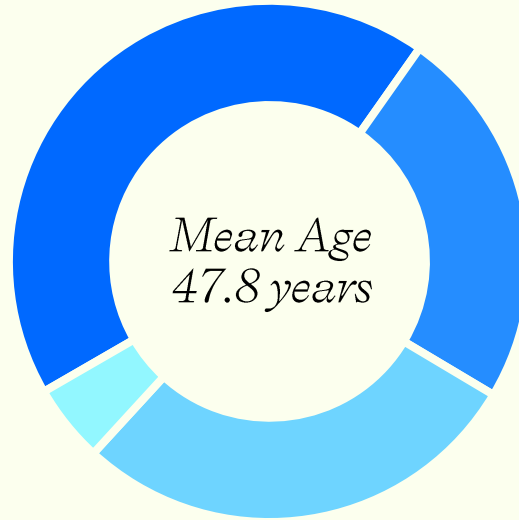
Gender



- Female, 57.8%
- Male, 42.2%

Generation

Average Age Declined YOY from 50.1 Years



- Boomers+, 45.3%
- Gen X, 25.0%
- Millennials, 24.7%
- Gen Z, 5.1%

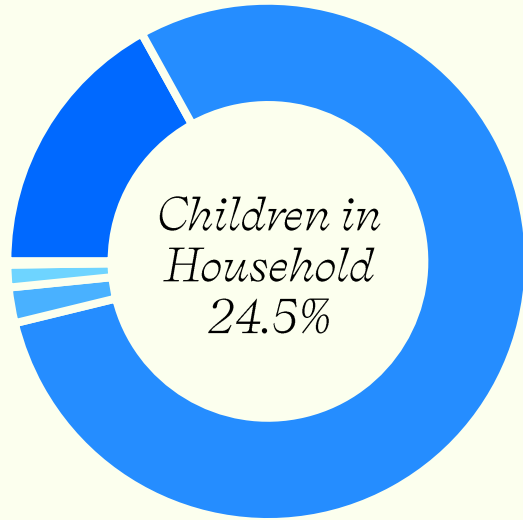
Ethnicity/Racial Identity



- White or Caucasian, 85.4%
- Hispanic or Latino, 8.1%
- Black or African American, 6.0%
- Asian or Pacific Islander, 2.7%
- Other, 0.6%

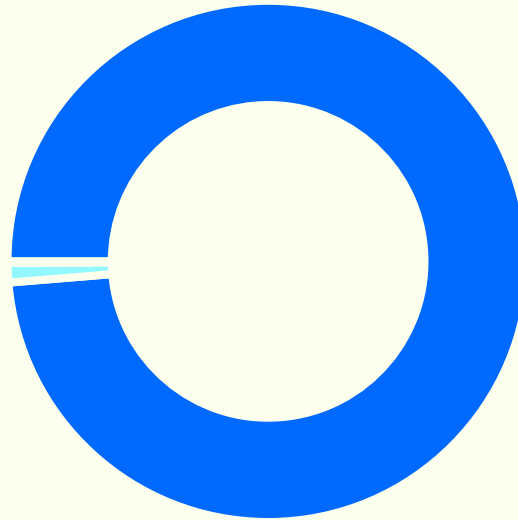
Demographics

Marital Status



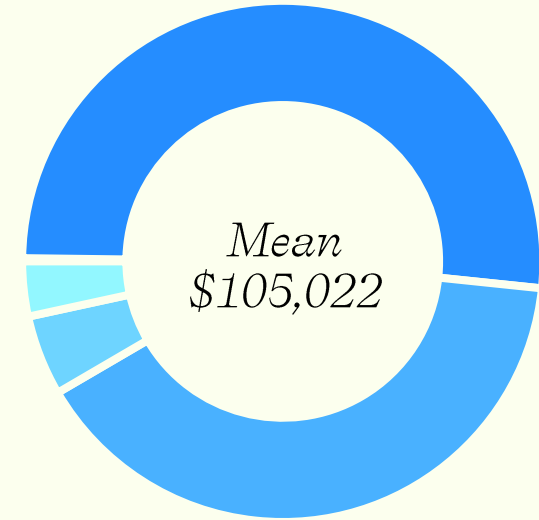
- Single, 16.9%
- Married or Partnered, 79.0%
- Divorced, 2.2%
- Widowed, 1.7%
- Other, 0.2%

Orientation



- Heterosexual, 98.7%
- LGBTQ, 1.2%
- I prefer not to answer, 0.1%

Household Income



- \$200,000 or more, 0.2%
- \$100,000 to \$199,999, 51.4%
- \$50,000 to \$99,999, 39.9%
- Less than \$49,999, 5.0%
- I prefer not to answer, 3.4%

HHI Remained flat YoY (\$105,058 in Q4 2024)