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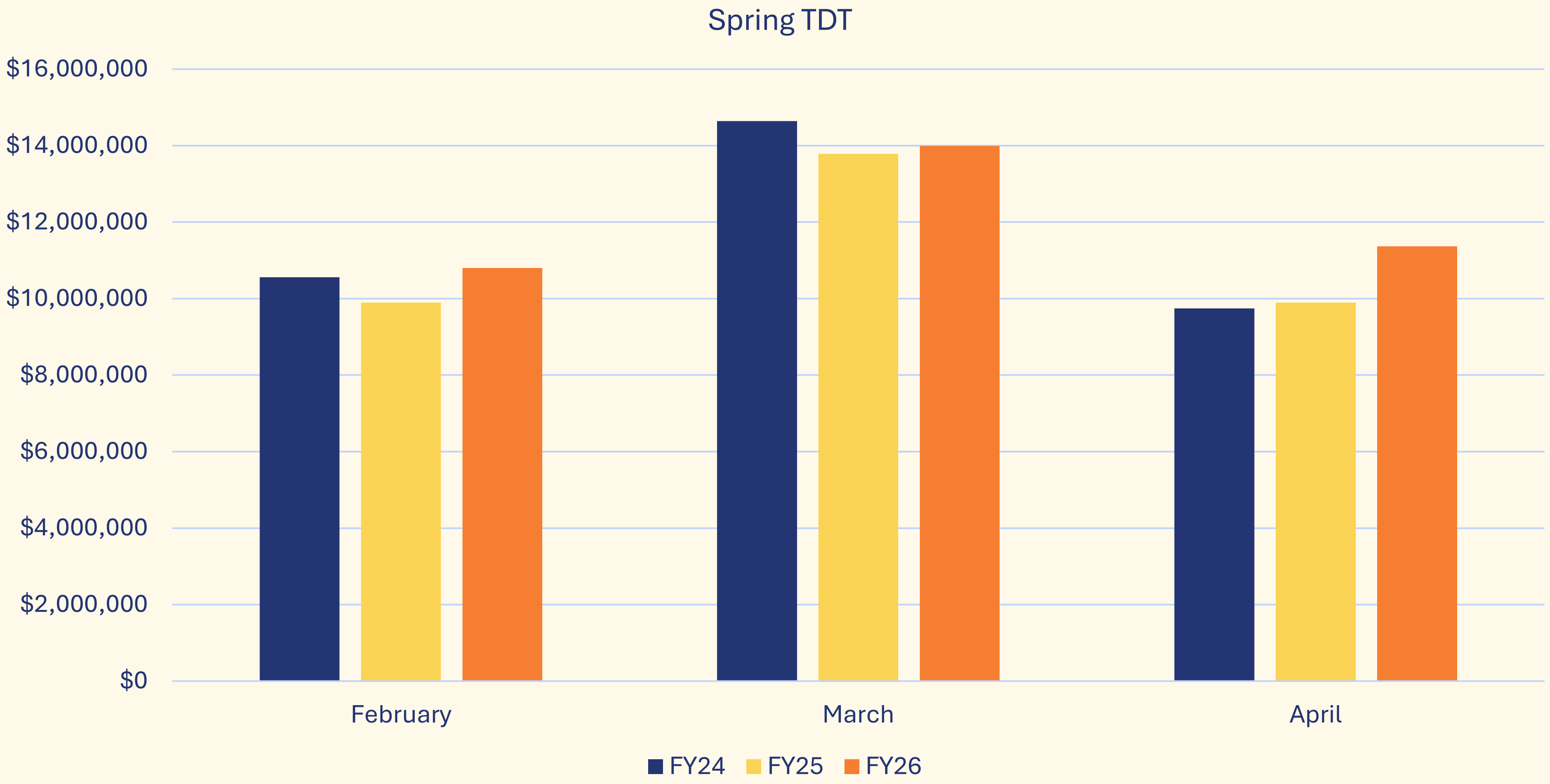
Spring Takeaways

Spring TDT



TOTAL SPRING TDT FY26
$36,158,863

+7.70% vs FY25
+3.48% vs FY24

Source: Pinellas County Tax Collector

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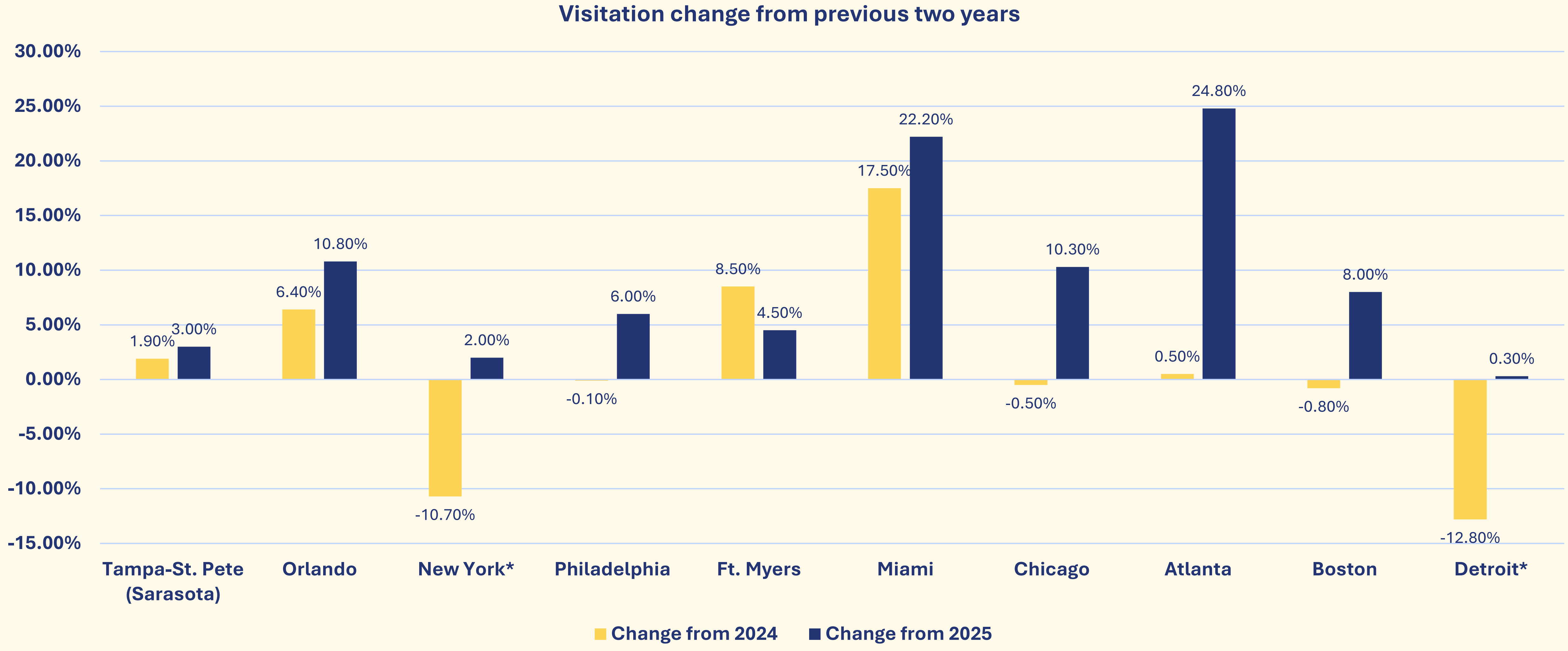
What Happened in Spring 2026 (Feb-April)

- Visitors and hotel revenue returned from key markets
- Upper tier and mid-tier hotel scales grew
- Vacation rental revenue and rates increased
- Travel Party Composition shifted
- More visitors traveled for special events/festivals

Visitation grew from all top markets vs last year



Source: Key Data - Amadeus

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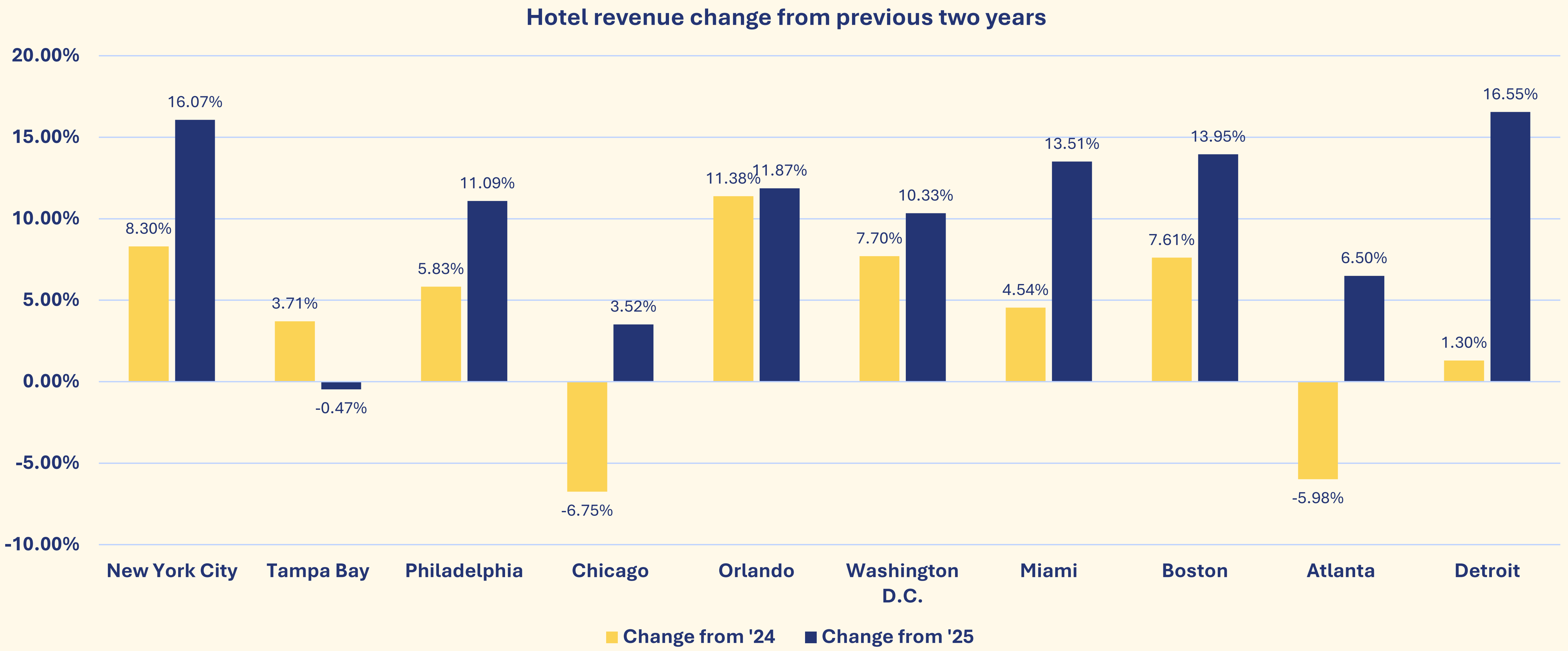
Hotel revenue also grew from nearly all top origin markets



9 of the top 10 2026 origin markets grew in hotel revenue from 2025. 8 of 10 grew from 2024.

Source: Key Data - Amadeus

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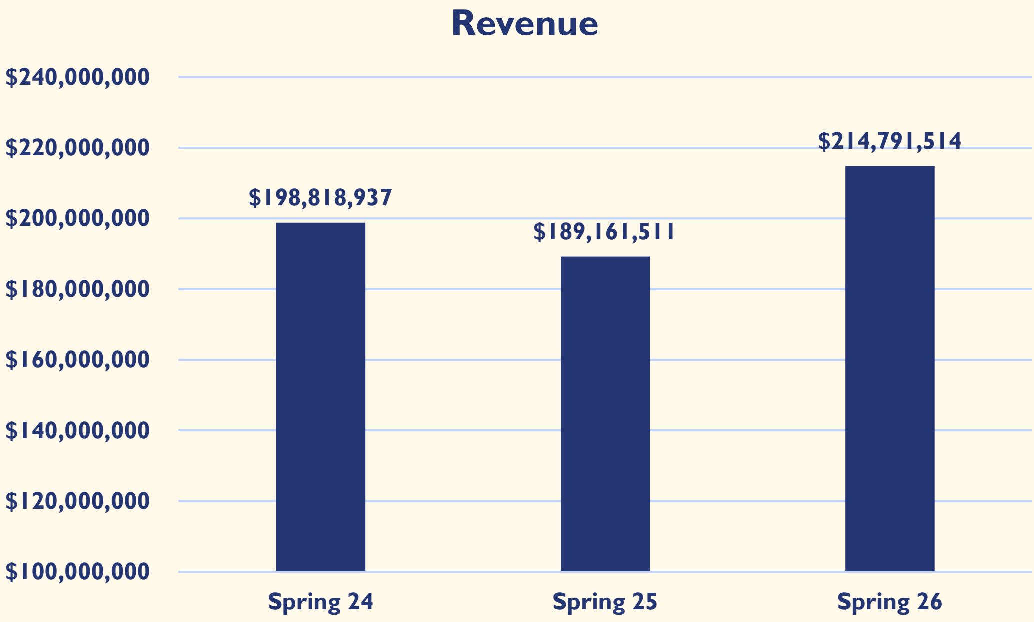
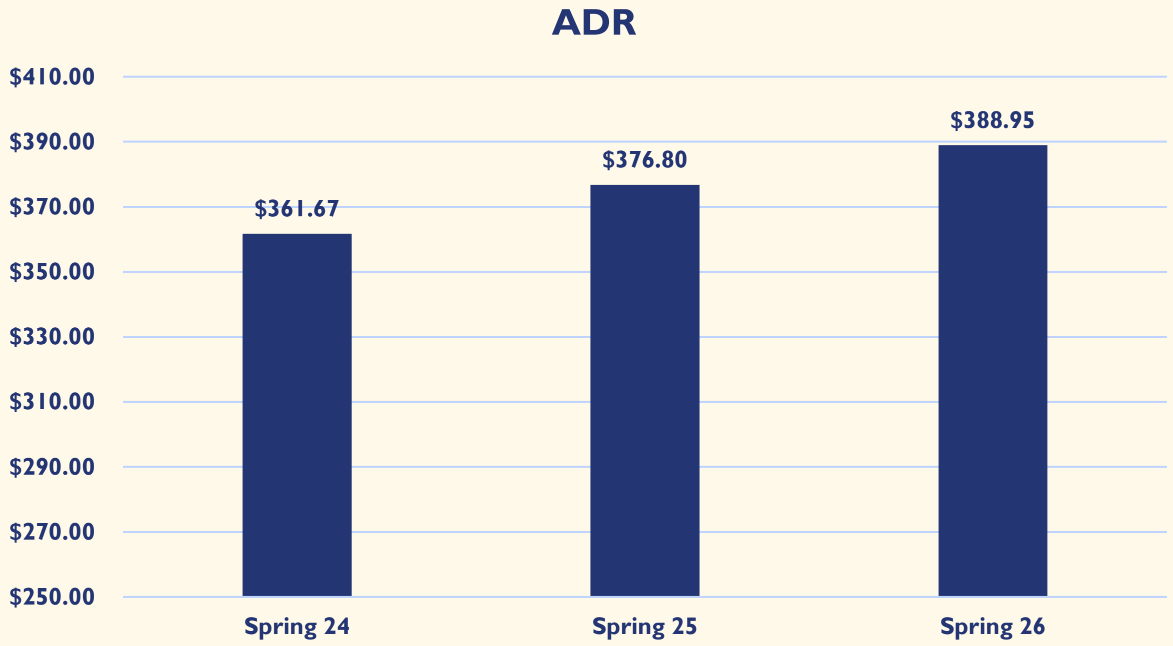
Upscale hotel revenue, rates increased

High-End Hotel Performance
(CoStar Luxury/Upper Upscale)



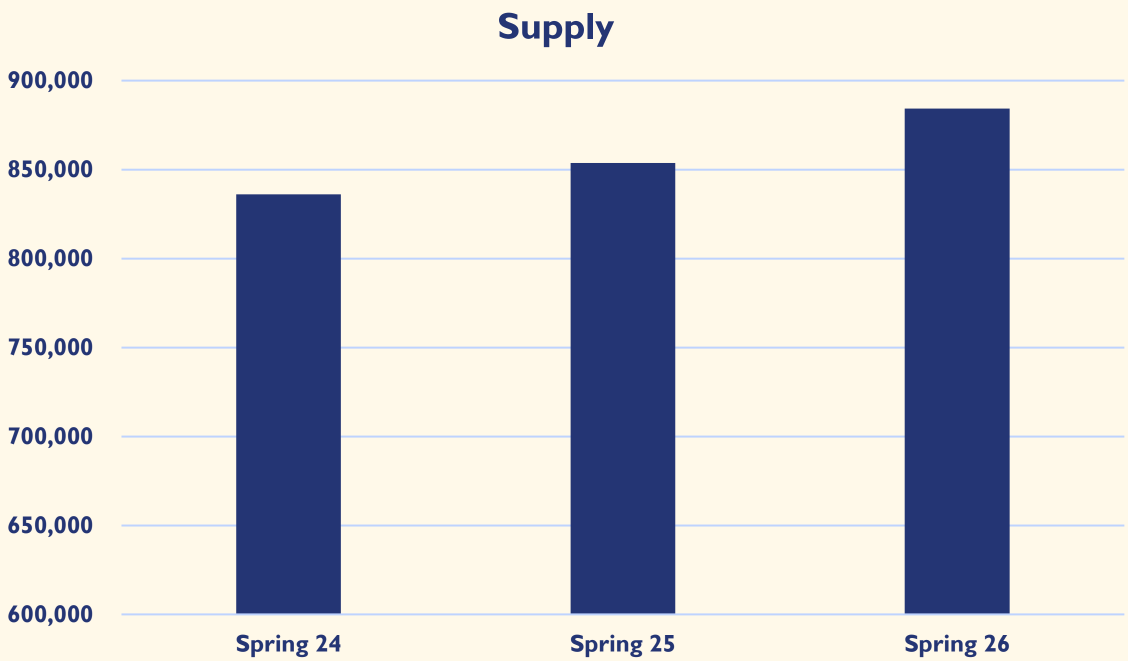


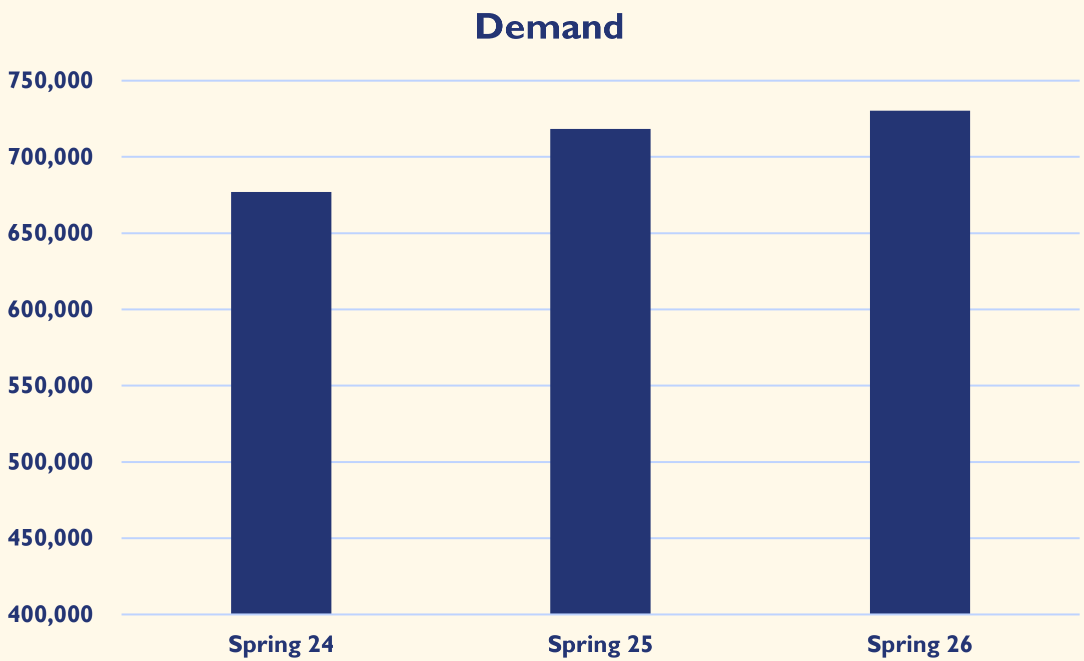
Upscale hotels:
- Revenue increased 13.55% vs ’25 | 8.03% vs ‘24
- Average rate increased 3.22% vs ’25 | 7.54% vs ‘24

Source: CoStar

Mid-tier supply and demand grew

Mid-tier Hotel Performance
(CoStar Upscale/Upper Midscale)

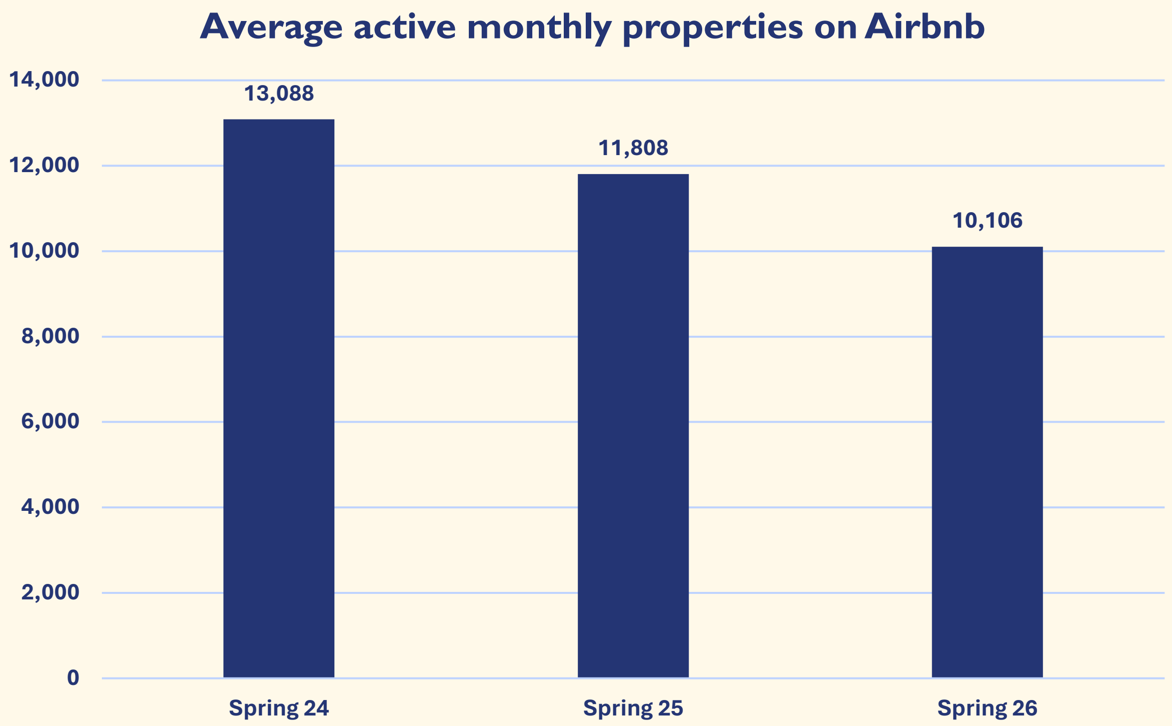


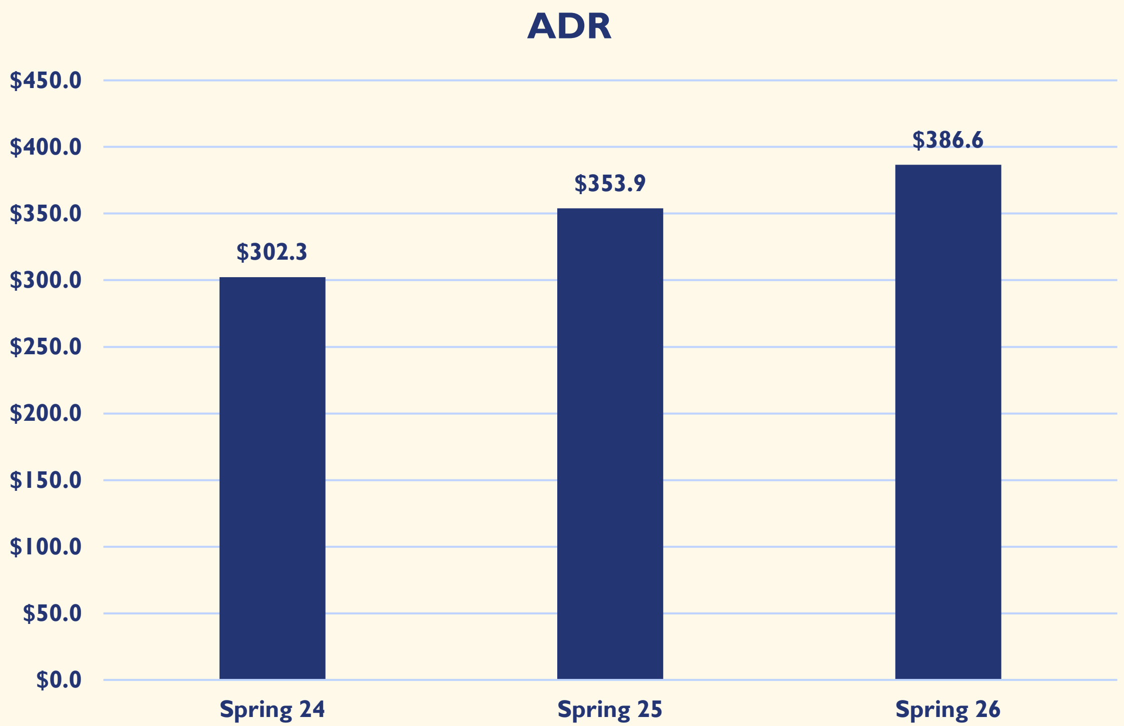


Mid-Scale Hotels:
- Supply increased 3.6% vs ’25 | 5.5% vs ‘24
- Demand increased 1.7% vs ’25 | 7.3% vs ‘24

Source: CoStar

Vacation Rental ADR greatly increased





Despite fewer active AirBnB properties in 2026, the average Airbnb rate grew 9.2% vs ’25 | 27.9% vs ‘24

Source: Key Data. In addition to direct data, Key Data scrapes from 6.15 million Airbnb properties world-wide.

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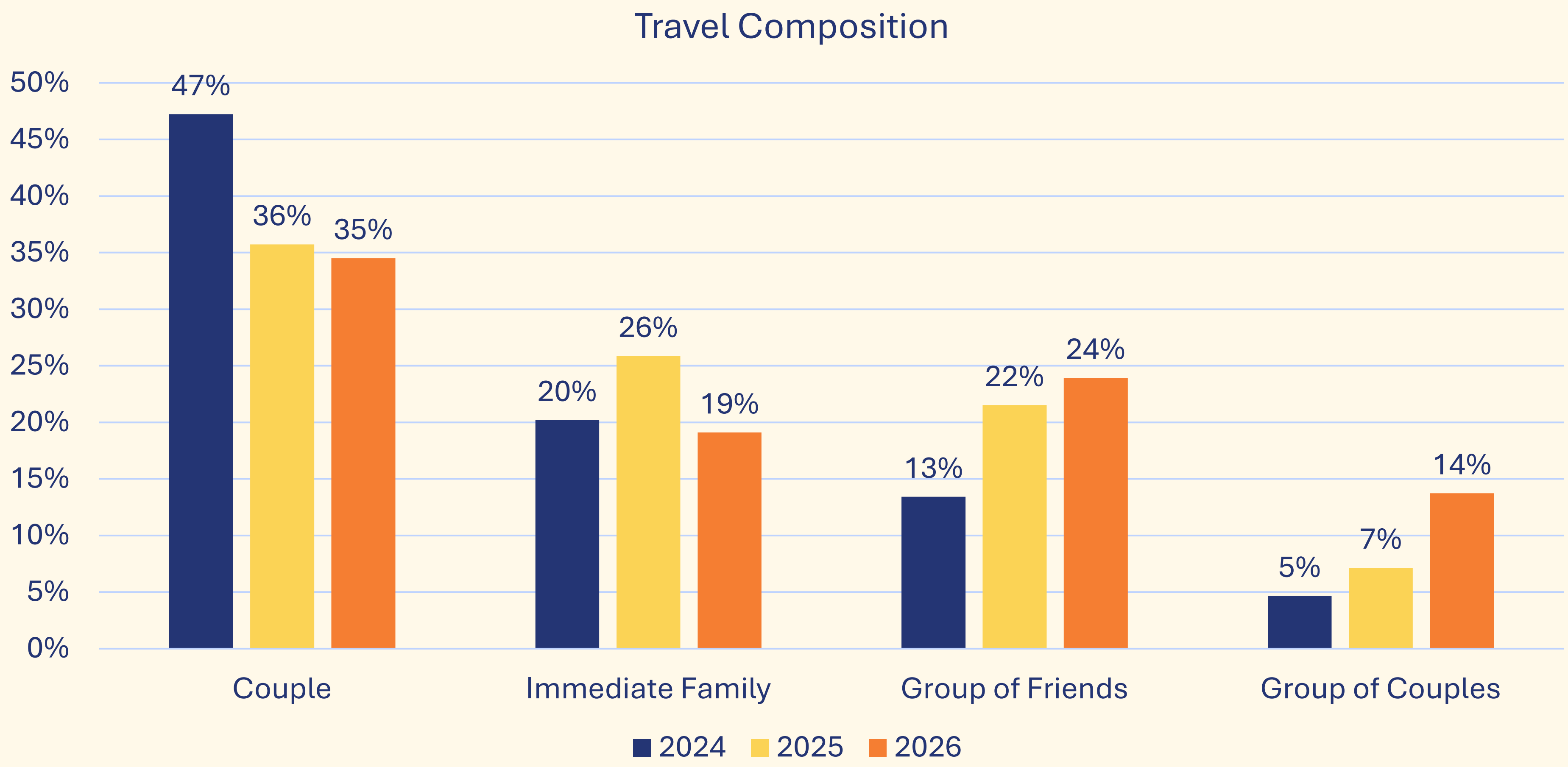
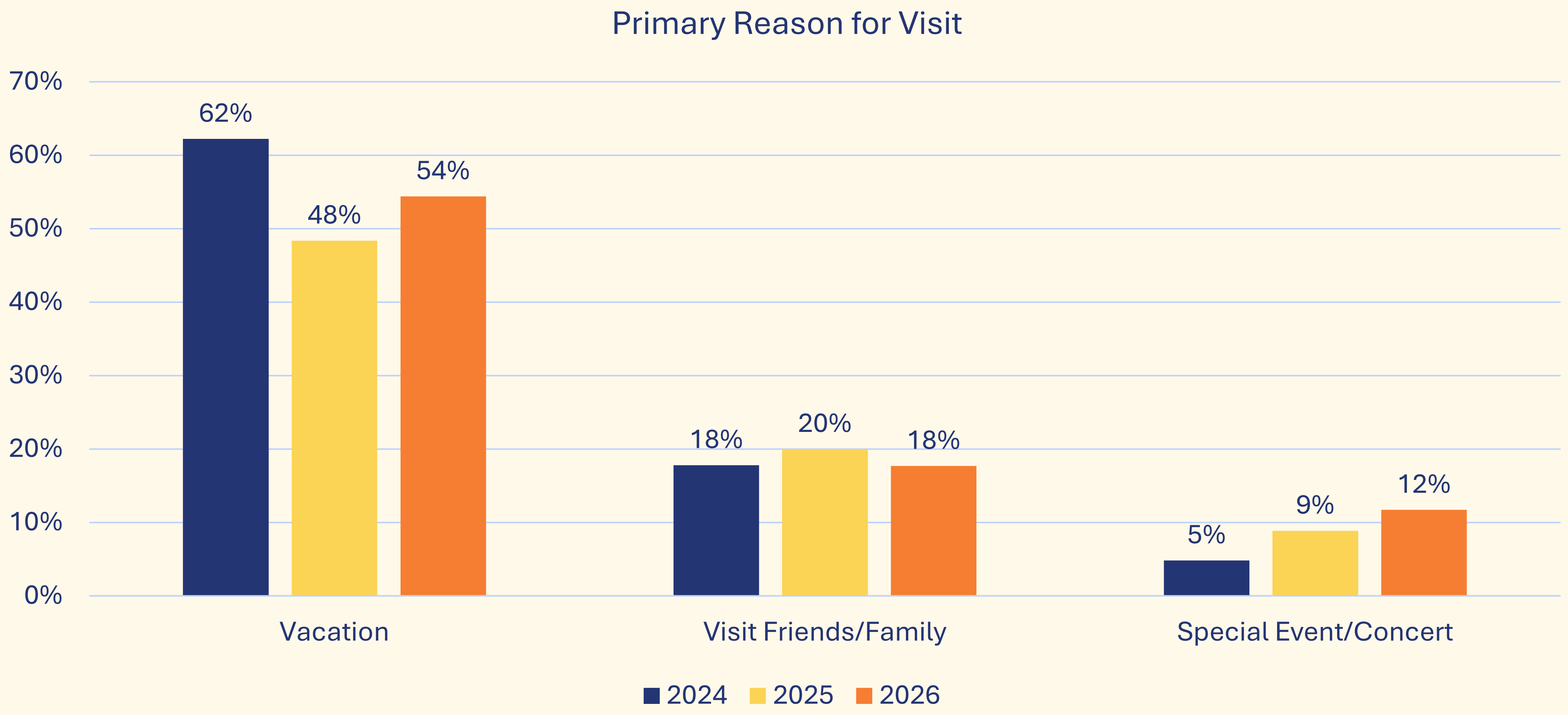
Couples are no longer traveling alone.



Travel parties as groups of friends and groups of couples are rising in popularity

Source: Future Partners

Vacation trips rebound from 2025, Special events drive more trips.



For the first time since 2019, 12% of visitors cited special events/concerts as their primary reason for visiting during spring.

Source: Future Partners

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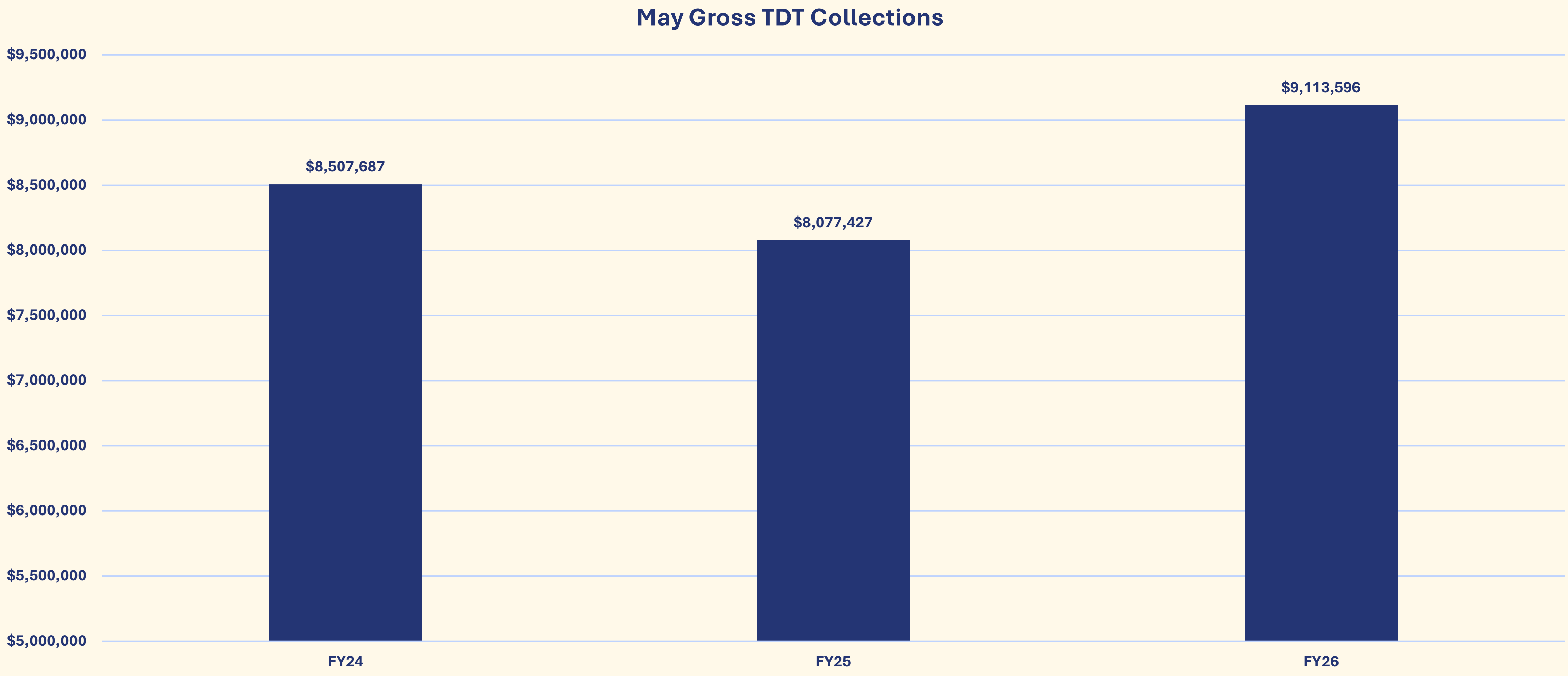
May Metrics

May TDT



Source: Pinellas County Tax Collector

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May TDT – Local Option

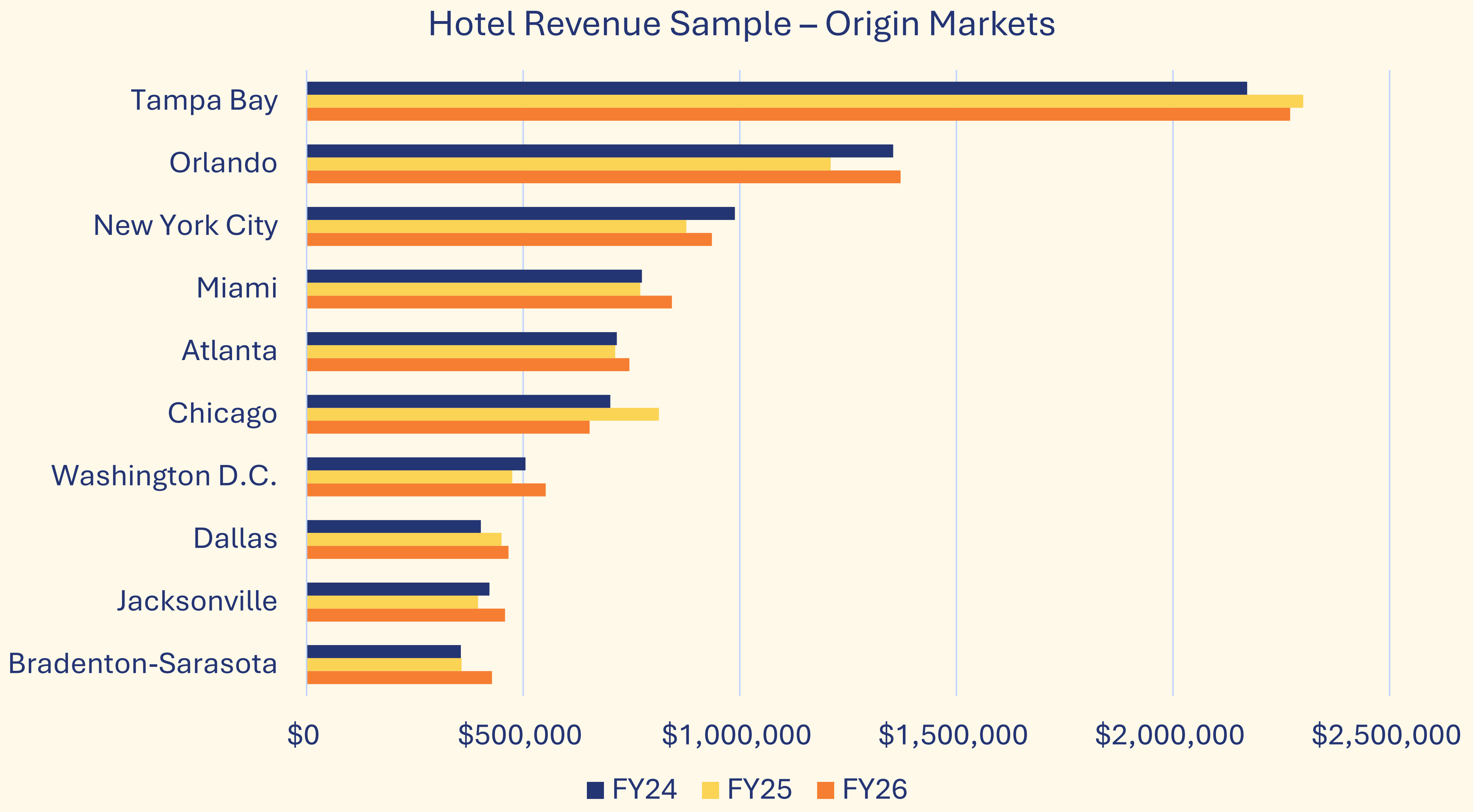
Cities	May 2026 Tax Collected	Change vs FY 25	Change vs FY24
Vacation Rental/Other	$3,286,194.21	21.57%	16.82%
Clearwater/Clearwater Beach	$2,677,242.21	3.07%	14.71%
St Petersburg	$1,010,339.21	4.05%	10.50%
St Pete Beach	$993,510.25	26.01%	-16.01%
Treasure Island	$296,781.79	4.56%	-19.17%
Madeira Beach	$122,058.22	5.97%	-8.52%
Oldsmar/Safety Harbor	$113,856.16	19.00%	2.93%
Dunedin	$106,274.47	8.76%	22.99%
Redington Area	$105,277.36	13.08%	-16.28%
Palm Harbor	$87,161.58	21.86%	10.01%
Indian Rocks Beach	$64,783.43	-1.75%	-6.49%
Tarpon Springs	$32,768.38	3.93%	-13.47%
Indian Shores	$31,454.23	16.19%	-24.15%
Belleair Area	$27,171.96	92.15%	17.78%

Source: Pinellas County Tax Collector

May Visitor & Industry Metrics

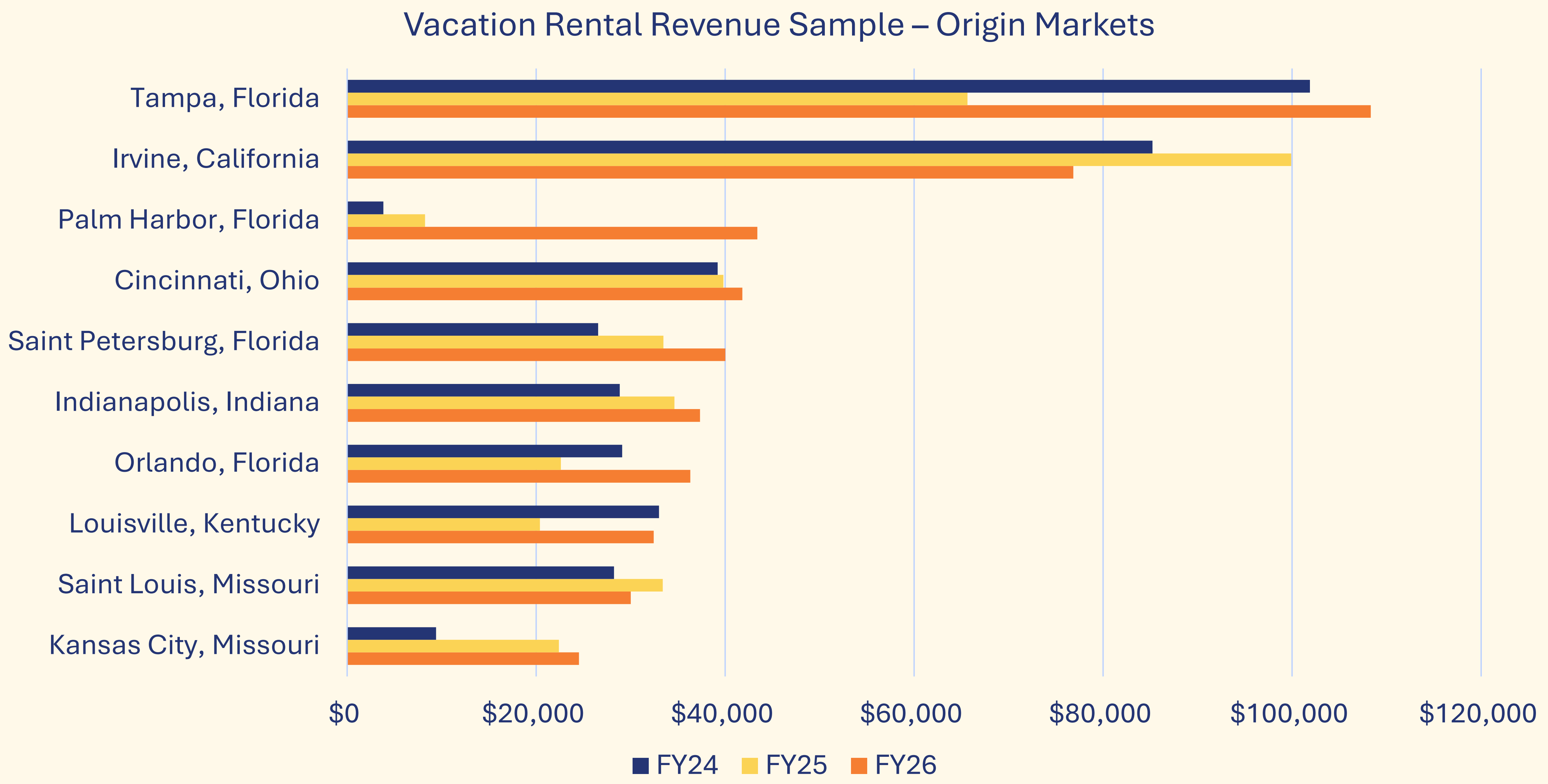
TOTAL VISITORS	HOTEL OCCUPANCY	HOTEL ADR	VACATION RENTAL OCCUPANCY	VACATION RENTAL ADR
3,098,691	**71.9%**	**$199.09**	**47.9%**	**$319**
+9.74% vs FY25	+2.86% vs FY25	+1.28% vs FY25	+8.13% vs FY25	+4.59% vs FY25
+0.73% vs FY24	+0.70% vs FY24	+3.94% vs FY24	+12.71% vs FY24	+19.03% vs FY24
Minimum 90 minutes in destination. Source: Placer	Source: CoStar	Source: CoStar	AirBnB occupancy for May. Source: Key Data	AirBnB ADR for May. Source: Key Data

May Origin Metrics



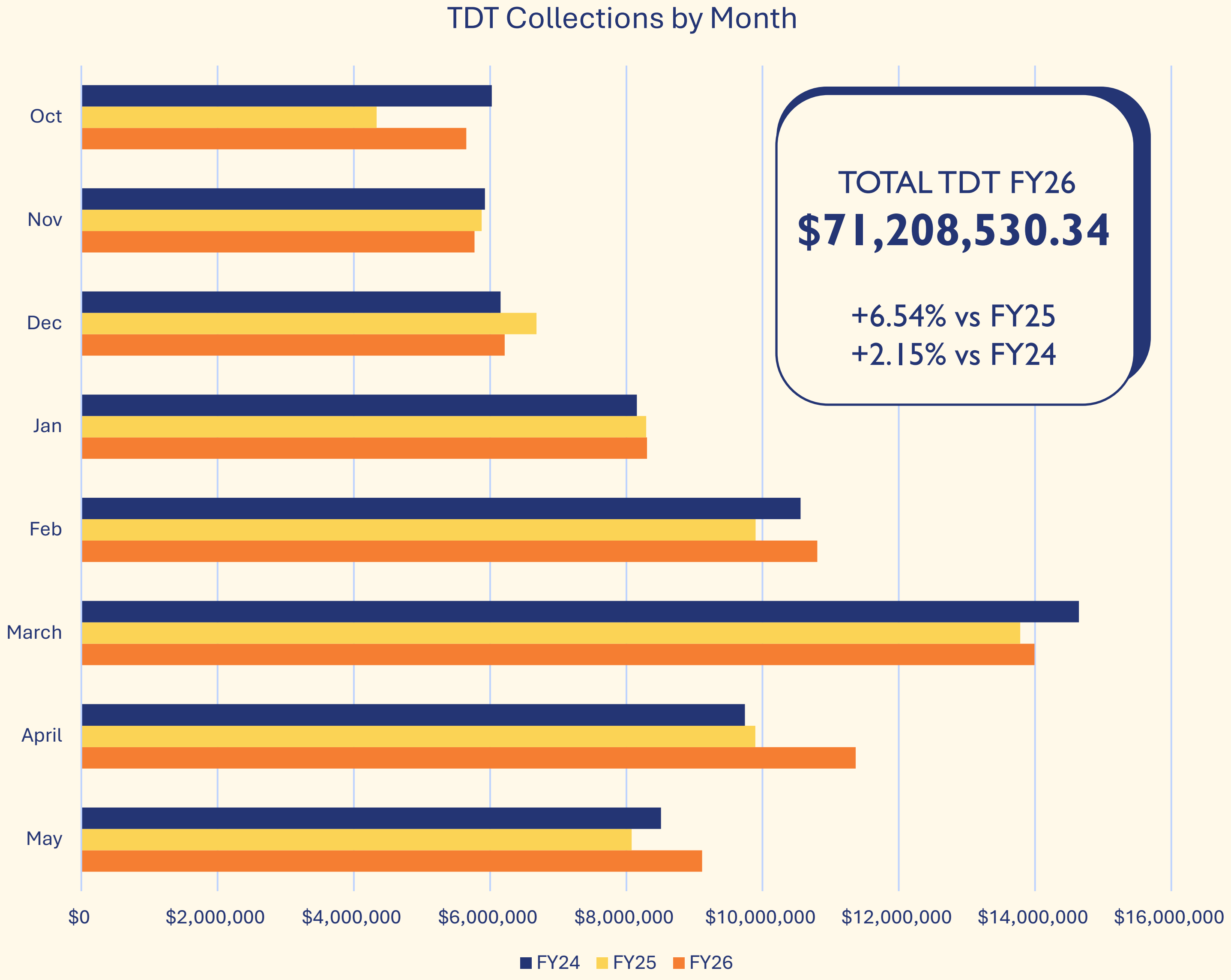
Source: Key Data - Amadeus

May Origin Metrics



Source: Key Data

Fiscal year to date visitor Metrics



TOTAL TDT FY26
$71,208,530.34

+6.54% vs FY25
+2.15% vs FY24

TOTAL VISITORS
11,695,709
+11.1% vs FY25
-3.5% vs FY24

Minimum 90 minutes in destination.
Source: Placer

HOTEL OCCUPANCY
69.5%
-10.0% vs FY25
+1.0% vs FY24

Source: CoStar

HOTEL ADR
$205.68
-0.1% vs FY25
+2.48% vs FY24

Source: CoStar

VACATION RENTAL OCCUPANCY
42.4%
+2.1% vs FY25
+6.3% vs FY24

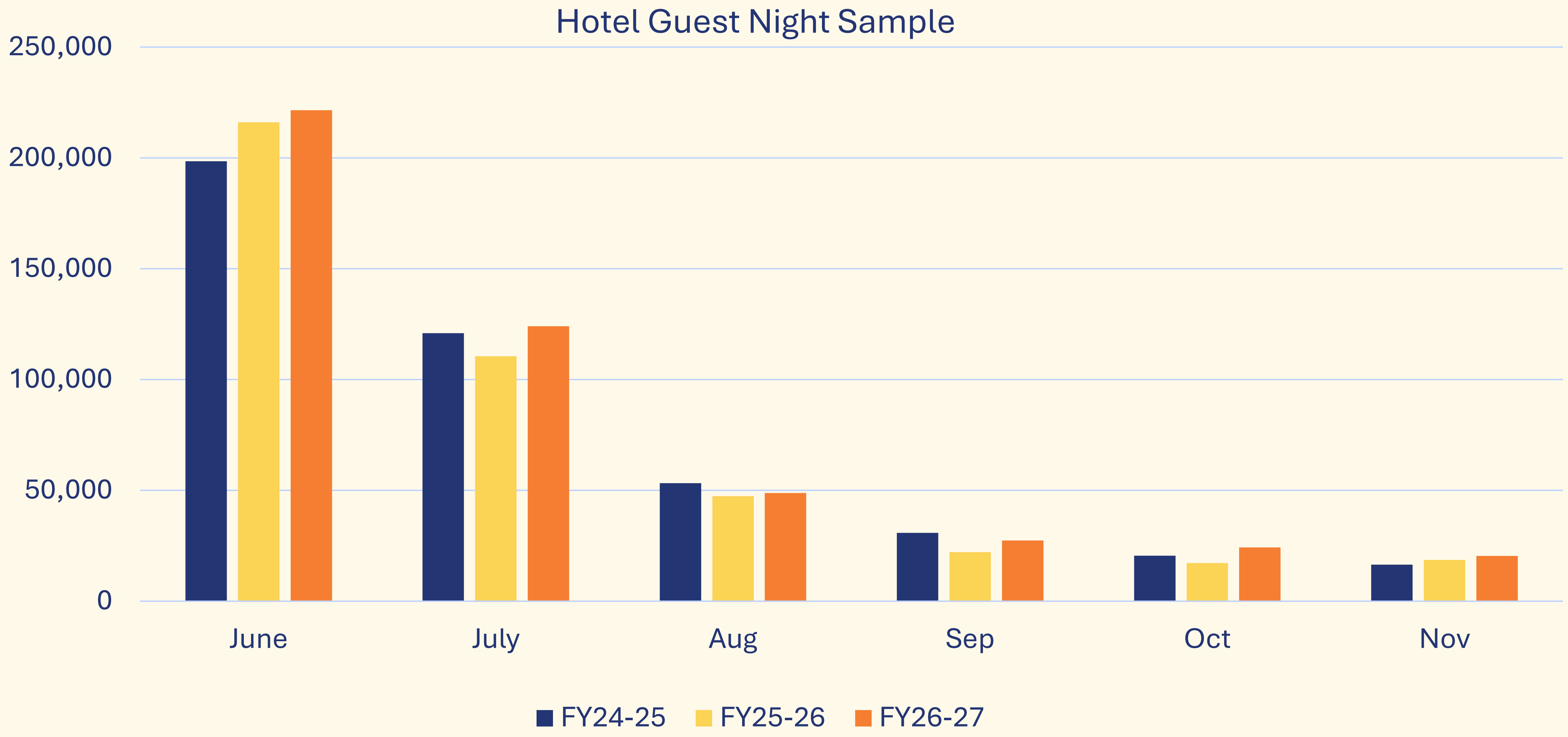
AirBnB occupancy
Source: Key Data

VACATION RENTAL ADR
$208.68
+7.8% vs FY25
+17.2% vs FY24

AirBnB ADR
Source: Key Data


Forward Pacing

Pacing – Next 6 Months



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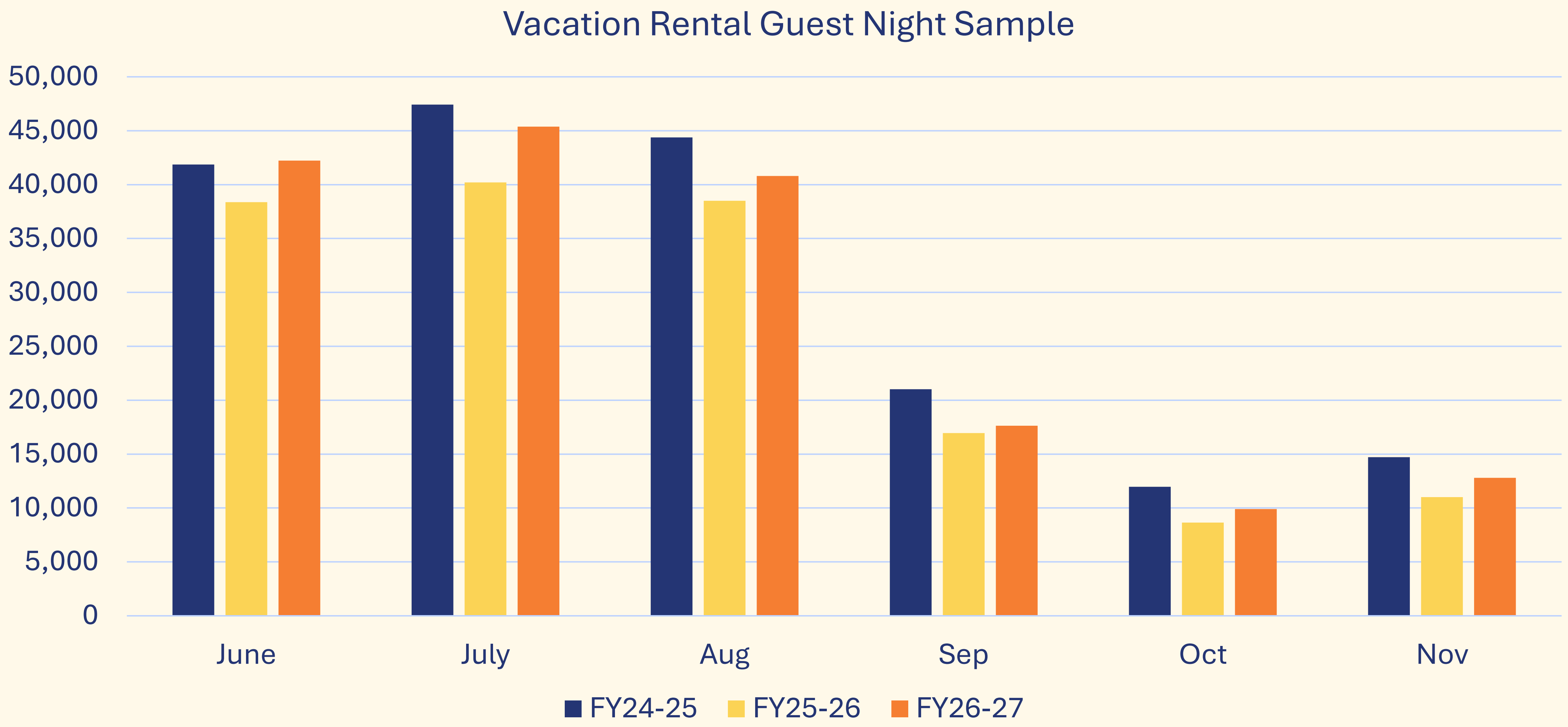
Pacing – Next 6 Months



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