



ST.PETE  
CLEARWATER  
FLORIDA

# Economic Snapshot Report

April 2026 TDC Meeting - February 2026 Data

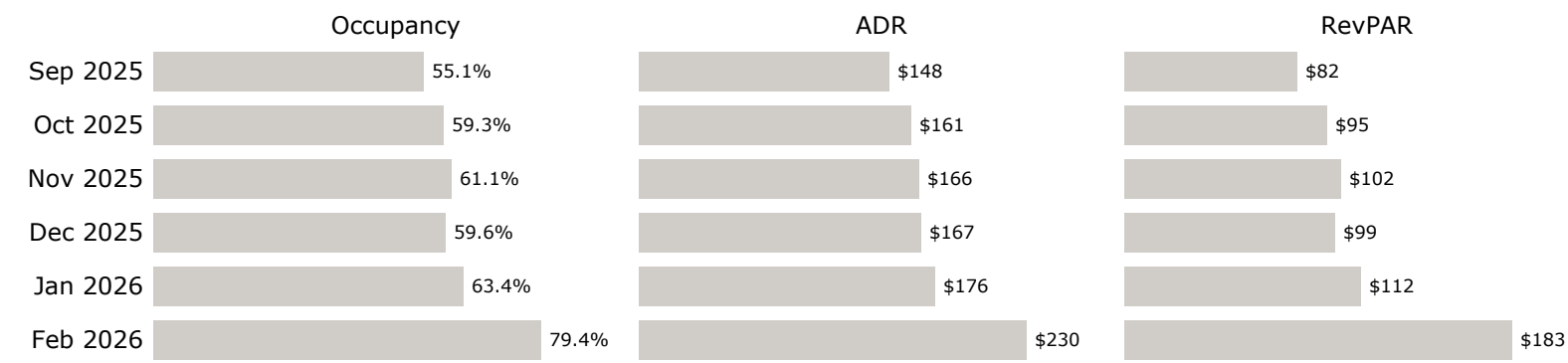
Hotel Performance Summary

Pinellas County, FL | February 2026



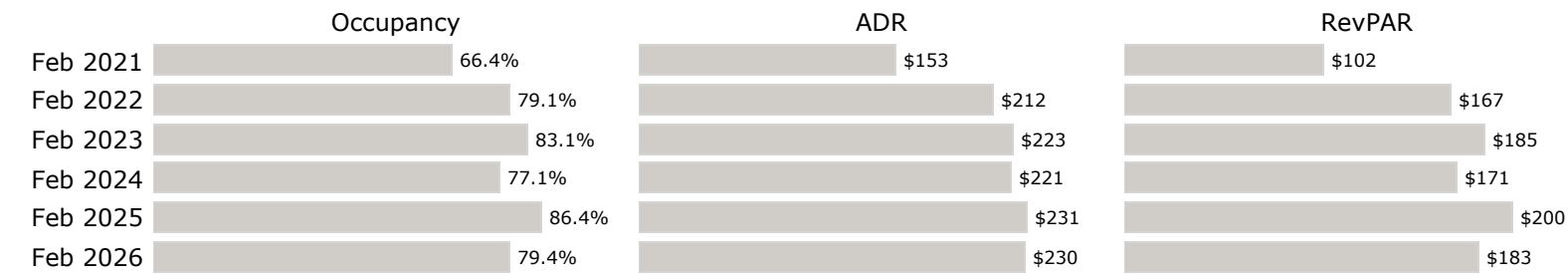
|                              | Occupancy | ADR      | RevPAR   | Supply | Demand   | Revenue  |
|------------------------------|-----------|----------|----------|--------|----------|----------|
|                              | 79.4%     | \$230.02 | \$182.59 | 621.2K | 493.1K   | \$113.4M |
| Change vs. Previous Year     | ▼ -8.1%   | ▼ -0.6%  | ▼ -8.7%  | ▲ 3.2% | ▼ -5.1%  | ▼ -5.7%  |
| YTD Fiscal Year              | 64.3%     | \$182.05 | \$117.07 | 3.3M   | 2.1M     | \$389.4M |
| YTD Change vs. Previous Year | ▼ -17.6%  | ▼ -2.1%  | ▼ -19.3% | ▲ 4.3% | ▼ -14.0% | ▼ -15.8% |

Last Six Months Performance

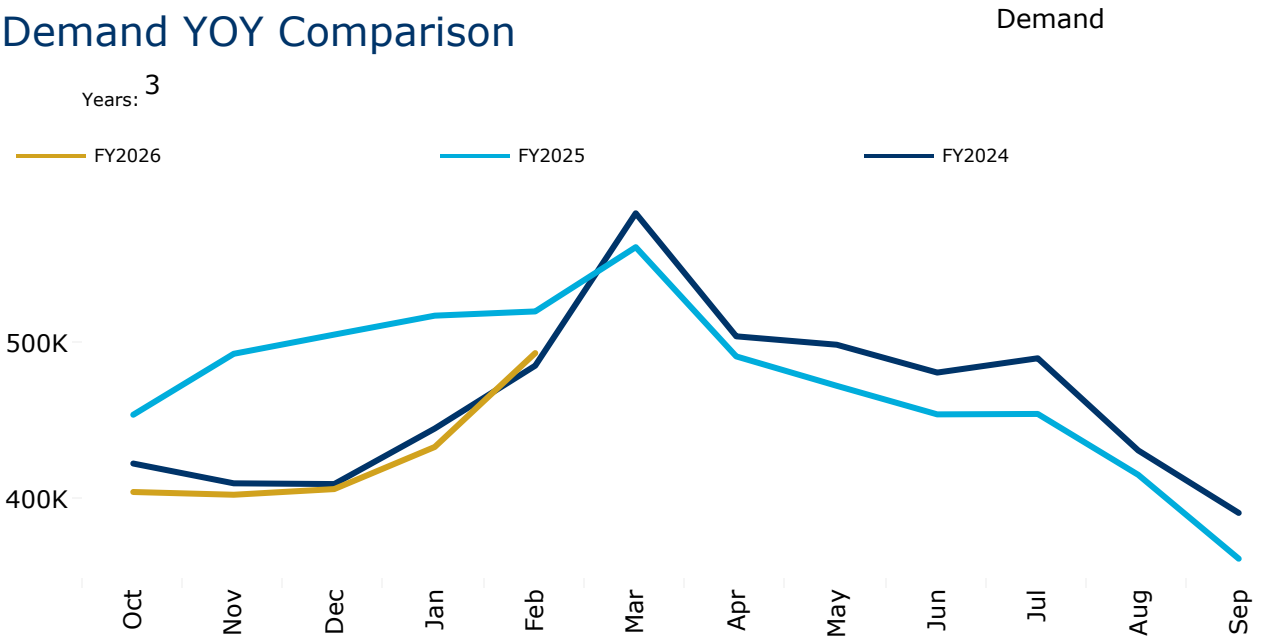


February Performance by Year

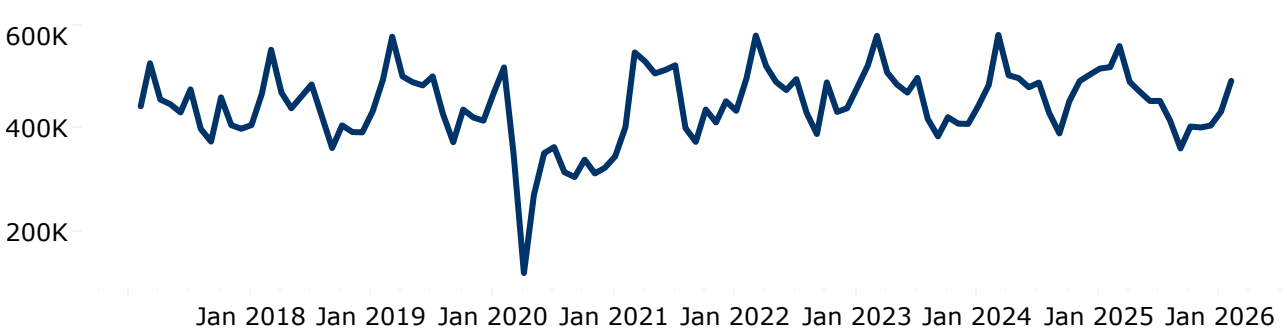
Pinellas County, FL



Demand YOY Comparison



Demand Long Term Trend



Submarkets Hotel Performance

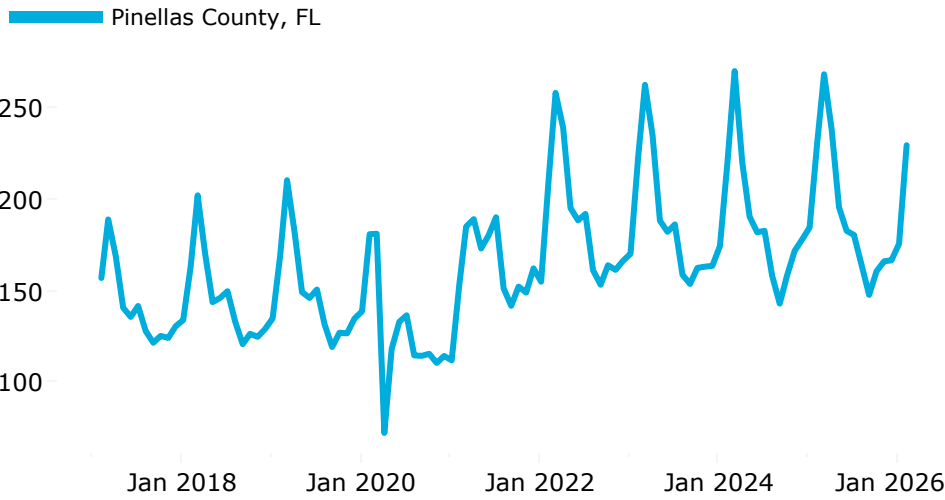
Pinellas County, FL vs. Submarkets



February 2026, Submarket Hotel KPIs

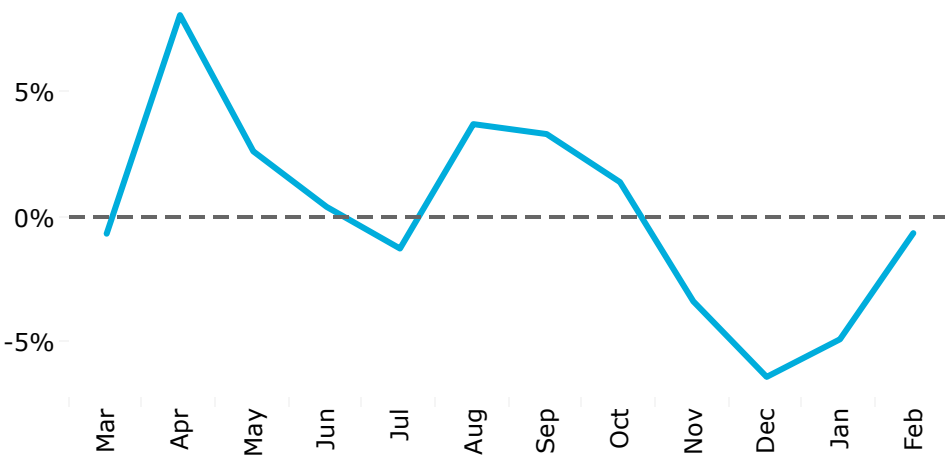
|                            |                   |                   |                   |        |  |        |  |          |
|----------------------------|-------------------|-------------------|-------------------|--------|--|--------|--|----------|
| St. Pete Beach/ Terra V..  | <div></div> 75.5% | <div></div> \$311 | <div></div> \$235 | 54.6K  |  | 41.2K  |  | \$12.8M  |
| Clearwater Beach+          | <div></div> 80.5% | <div></div> \$309 | <div></div> \$249 | 117.6K |  | 94.6K  |  | \$29.2M  |
| Downtown St. Petersbu..    | <div></div> 84.6% | <div></div> \$305 | <div></div> \$258 | 45.1K  |  | 38.1K  |  | \$11.6M  |
| Beach+                     | <div></div> 77.9% | <div></div> \$289 | <div></div> \$225 | 237.6K |  | 185.2K |  | \$53.5M  |
| Treasure Island Beach+     | <div></div> 78.4% | <div></div> \$251 | <div></div> \$197 | 26.9K  |  | 21.1K  |  | \$5.3M   |
| State of Florida           | <div></div> 78.6% | <div></div> \$247 | <div></div> \$194 | 14.2M  |  | 11.2M  |  | \$2.8B   |
| Dunedin+                   | <div></div> 81.4% | <div></div> \$237 | <div></div> \$193 | 11.6K  |  | 9.5K   |  | \$2.2M   |
| Pinellas County, FL        | <div></div> 79.4% | <div></div> \$230 | <div></div> \$183 | 621.2K |  | 493.1K |  | \$113.4M |
| Indian Rocks Beach/ In..   | <div></div> 76.2% | <div></div> \$220 | <div></div> \$167 | 45.0K  |  | 34.3K  |  | \$7.5M   |
| Inland+                    | <div></div> 80.0% | <div></div> \$178 | <div></div> \$142 | 302.4K |  | 241.9K |  | \$43.0M  |
| Tarpon Springs/ Oldsm..    | <div></div> 77.8% | <div></div> \$169 | <div></div> \$131 | 34.4K  |  | 26.7K  |  | \$4.5M   |
| St. Pete/ Largo/ Pinella.. | <div></div> 81.7% | <div></div> \$154 | <div></div> \$126 | 96.4K  |  | 78.7K  |  | \$12.1M  |
| Clearwater+                | <div></div> 77.3% | <div></div> \$140 | <div></div> \$108 | 116.3K |  | 89.9K  |  | \$12.6M  |
| Occupancy                  |                   | ADR               | RevPAR            | Supply |  | Demand |  | Revenue  |

ADR Comparison



ADR vs. Same Month in Previous Year

Last 12 Months



February 2026, Submarket Hotel Performance vs. Previous Year

|                                             | Occ   | YOY      | ADR   | YOY      | RevPAR | YOY      | Total Supply | YOY     | Rooms Sold | YOY      | Room Revenue | YOY      |
|---------------------------------------------|-------|----------|-------|----------|--------|----------|--------------|---------|------------|----------|--------------|----------|
| Clearwater Beach+                           | 80.5% | ▼ -6.7%  | \$309 | ▲ 3.3%   | \$249  | ▼ -3.6%  | 117.6K       | ▲ 0.7%  | 94.6K      | ▼ -6.0%  | \$29.2M      | ▼ -2.9%  |
| Clearwater+                                 | 77.3% | ▼ -13.1% | \$140 | ▼ -13.7% | \$108  | ▼ -25.0% | 116.3K       | ▼ -1.4% | 89.9K      | ▼ -14.3% | \$12.6M      | ▼ -26.1% |
| Downtown St. Petersburg+                    | 84.6% | ▼ -2.1%  | \$305 | ▲ 3.5%   | \$258  | ▲ 1.3%   | 45.1K        | ▲ 0.1%  | 38.1K      | ▼ -2.0%  | \$11.6M      | ▲ 1.4%   |
| Dunedin+                                    | 81.4% | ▼ -5.8%  | \$237 | ▼ -1.3%  | \$193  | ▼ -7.1%  | 11.6K        | ▲ 0.0%  | 9.5K       | ▼ -5.8%  | \$2.2M       | ▼ -7.1%  |
| Indian Rocks Beach/ Indian Shores/ Madeir.. | 76.2% | ▼ -12.8% | \$220 | ▼ -2.0%  | \$167  | ▼ -14.6% | 45.0K        | ▲ 1.7%  | 34.3K      | ▼ -11.4% | \$7.5M       | ▼ -13.1% |
| Pinellas County, FL                         | 79.4% | ▼ -8.1%  | \$230 | ▼ -0.6%  | \$183  | ▼ -8.7%  | 621.2K       | ▲ 3.2%  | 493.1K     | ▼ -5.1%  | \$113.4M     | ▼ -5.7%  |
| St. Pete Beach/ Terra Verde+                | 75.5% | ▼ -2.3%  | \$311 | ▲ 16.2%  | \$235  | ▲ 13.5%  | 54.6K        | ▲ 25.6% | 41.2K      | ▲ 22.7%  | \$12.8M      | ▲ 42.5%  |
| St. Pete/ Largo/ Pinellas Park+             | 81.7% | ▼ -9.2%  | \$154 | ▼ -13.3% | \$126  | ▼ -21.2% | 96.4K        | ▼ -0.8% | 78.7K      | ▼ -9.9%  | \$12.1M      | ▼ -21.9% |
| Tarpon Springs/ Oldsmar/ Palm Harbor..      | 77.8% | ▼ -3.5%  | \$169 | ▼ -13.5% | \$131  | ▼ -16.5% | 34.4K        | ▲ 0.0%  | 26.7K      | ▼ -3.5%  | \$4.5M       | ▼ -16.5% |
| Treasure Island Beach+                      | 78.4% | ▼ -4.8%  | \$251 | ▼ -1.7%  | \$197  | ▼ -6.4%  | 26.9K        | ▲ 0.5%  | 21.1K      | ▼ -4.3%  | \$5.3M       | ▼ -5.9%  |

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

Source: STR

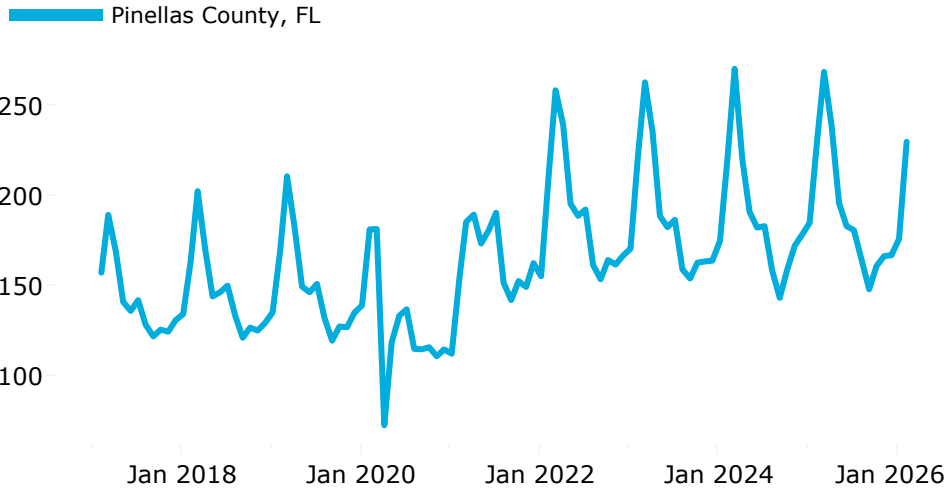
Competitive Markets Hotel Performance
Pinellas County, FL vs. Comp. Markets



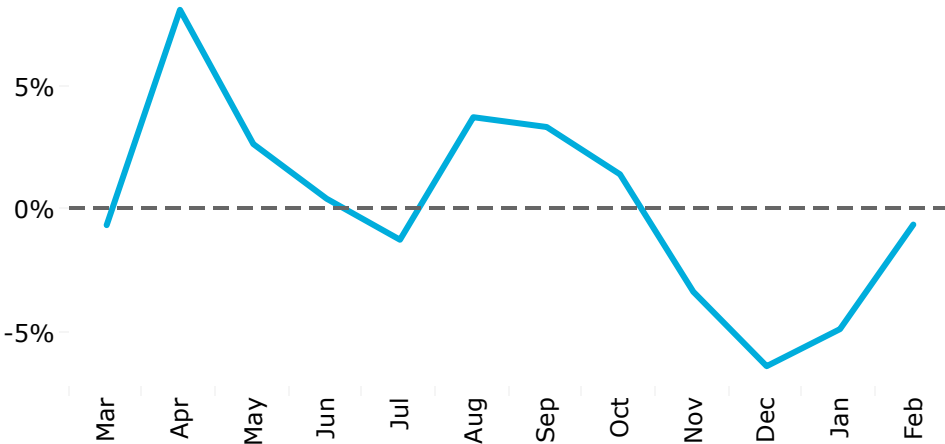
February 2026, Comp. Markets Hotel KPIs

|                         |       |       |        |        |            |          |
|-------------------------|-------|-------|--------|--------|------------|----------|
| Florida Keys            | 88.1% | \$493 | \$434  | 300.2K | 264.4K     | \$130.2M |
| Naples, FL              | 82.2% | \$438 | \$360  | 92.8K  | 76.3K      | \$33.4M  |
| Palm Beach County, FL   | 87.5% | \$431 | \$377  | 537.6K | 470.1K     | \$202.7M |
| Miami/Hialeah, FL       | 84.9% | \$322 | \$274  | 1.8M   | 1.5M       | \$498.0M |
| Sarasota/Bradenton, FL  | 81.0% | \$283 | \$229  | 351.2K | 284.5K     | \$80.5M  |
| Fort Lauderdale, FL     | 85.7% | \$253 | \$217  | 1.1M   | 941.3K     | \$238.2M |
| State of Florida        | 78.6% | \$247 | \$194  | 14.2M  | 11.2M      | \$2.8B   |
| Orlando                 | 81.6% | \$241 | \$196  | 4.0M   | 3.3M       | \$794.7M |
| Fort Myers, FL          | 80.9% | \$235 | \$190  | 365.7K | 295.9K     | \$69.5M  |
| Pinellas County, FL     | 79.4% | \$230 | \$183  | 621.2K | 493.1K     | \$113.4M |
| Hillsborough County, .. | 82.5% | \$204 | \$168  | 730.8K | 602.8K     | \$122.8M |
| Osceola County, FL      | 77.1% | \$183 | \$141  | 737.9K | 569.2K     | \$104.0M |
| Bay County, FL          | 55.7% | \$100 | \$56   | 306.3K | 170.6K     | \$17.1M  |
| Occupancy               |       | ADR   | RevPAR | Supply | Rooms Sold | Revenue  |

ADR Comparison



ADR vs. Same Month in Previous Year
Last 12 Months



February 2026, Comp. Markets Hotel Performance vs. Previous Year

|                       | Occ   | YOY     | ADR   | YOY     | RevPAR | YOY     | Total Supply | YOY     | Demand | YOY     | Revenue  | YOY     |
|-----------------------|-------|---------|-------|---------|--------|---------|--------------|---------|--------|---------|----------|---------|
| Bay County, FL        | 55.7% | ▲ 3.4%  | \$100 | ▼ -0.4% | \$56   | ▲ 3.0%  | 306.3K       | ▼ -0.5% | 170.6K | ▲ 2.9%  | \$17.1M  | ▲ 2.4%  |
| Florida Keys          | 88.1% | ▲ 2.9%  | \$493 | ▲ 7.0%  | \$434  | ▲ 10.1% | 300.2K       | ▲ 0.0%  | 264.4K | ▲ 2.9%  | \$130.2M | ▲ 10.1% |
| Fort Lauderdale, FL   | 85.7% | ▲ 3.5%  | \$253 | ▲ 5.0%  | \$217  | ▲ 8.7%  | 1.1M         | ▲ 1.0%  | 941.3K | ▲ 4.5%  | \$238.2M | ▲ 9.8%  |
| Fort Myers, FL        | 80.9% | ▲ 3.2%  | \$235 | ▲ 0.4%  | \$190  | ▲ 3.6%  | 365.7K       | ▲ 3.3%  | 295.9K | ▲ 6.6%  | \$69.5M  | ▲ 7.0%  |
| Hillsborough County.. | 82.5% | ▼ -4.7% | \$204 | ▼ -4.4% | \$168  | ▼ -8.9% | 730.8K       | ▲ 1.1%  | 602.8K | ▼ -3.6% | \$122.8M | ▼ -7.9% |
| Miami/Hialeah, FL     | 84.9% | ▼ -0.8% | \$322 | ▲ 6.0%  | \$274  | ▲ 5.1%  | 1.8M         | ▼ -0.7% | 1.5M   | ▼ -1.5% | \$498.0M | ▲ 4.4%  |
| Naples, FL            | 82.2% | ▲ 2.1%  | \$438 | ▲ 8.4%  | \$360  | ▲ 10.7% | 92.8K        | ▲ 6.4%  | 76.3K  | ▲ 8.6%  | \$33.4M  | ▲ 17.8% |
| Orlando               | 81.6% | ▲ 1.4%  | \$241 | ▲ 6.3%  | \$196  | ▲ 7.8%  | 4.0M         | ▲ 0.9%  | 3.3M   | ▲ 2.3%  | \$794.7M | ▲ 8.8%  |
| Osceola County, FL    | 77.1% | ▲ 3.2%  | \$183 | ▲ 8.3%  | \$141  | ▲ 11.8% | 737.9K       | ▲ 0.7%  | 569.2K | ▲ 3.9%  | \$104.0M | ▲ 12.6% |
| Palm Beach County,..  | 87.5% | ▲ 2.6%  | \$431 | ▲ 11.9% | \$377  | ▲ 14.7% | 537.6K       | ▼ -0.8% | 470.1K | ▲ 1.8%  | \$202.7M | ▲ 13.8% |
| Pinellas County, FL   | 79.4% | ▼ -8.1% | \$230 | ▼ -0.6% | \$183  | ▼ -8.7% | 621.2K       | ▲ 3.2%  | 493.1K | ▼ -5.1% | \$113.4M | ▼ -5.7% |
| Sarasota/Bradenton..  | 81.0% | ▼ -1.2% | \$283 | ▲ 7.0%  | \$229  | ▲ 5.8%  | 351.2K       | ▲ 0.1%  | 284.5K | ▼ -1.1% | \$80.5M  | ▲ 5.9%  |
| State of Florida      | 78.6% | ▼ -0.3% | \$247 | ▲ 4.7%  | \$194  | ▲ 4.4%  | 14.2M        | ▲ 1.0%  | 11.2M  | ▲ 0.7%  | \$2.8B   | ▲ 5.5%  |

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

Source: STR



# Pinellas County Tourist Development Tax Collections

February 2026

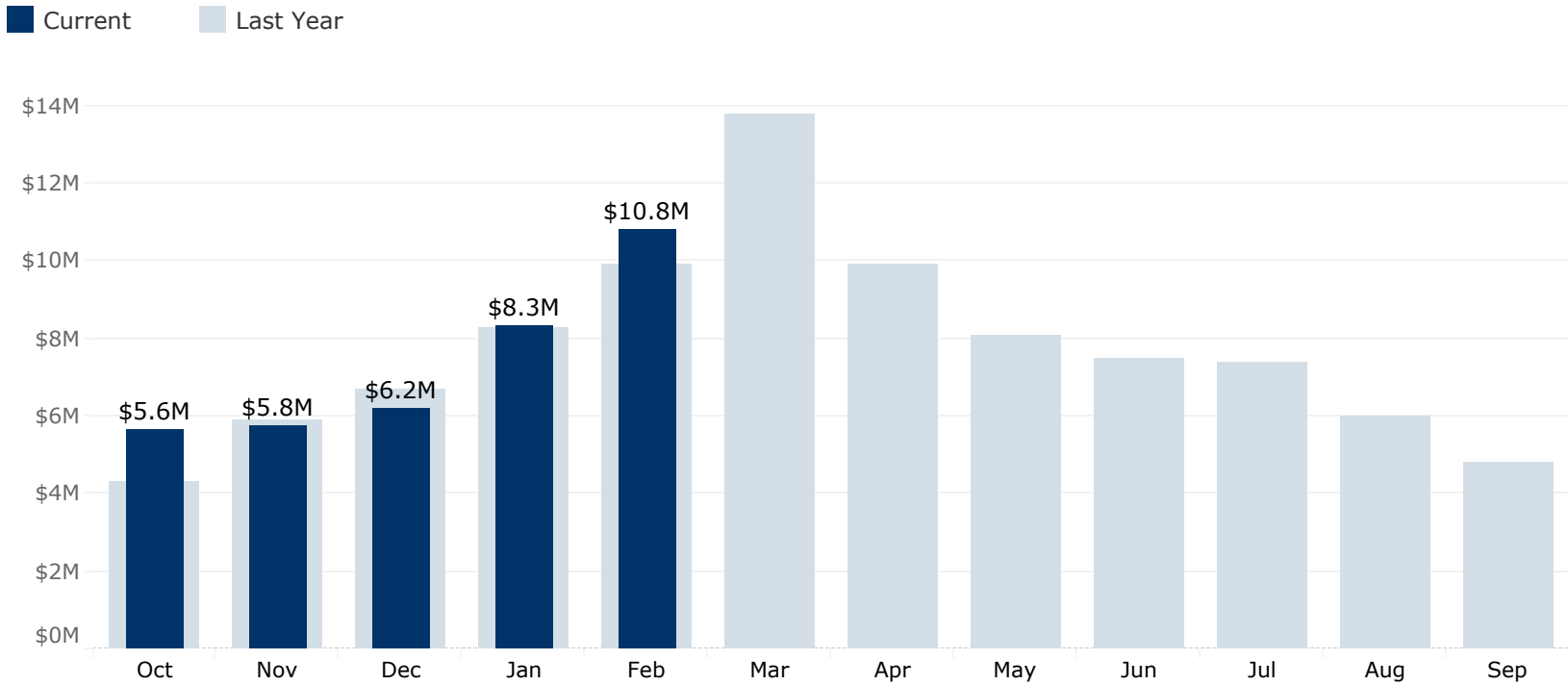


Tourist Development Tax Collections  
**\$10.8M**  
+9.1% YOY | +68.2% vs. 2019  
Gross Tax Collected

## Tourist Development Tax Collections by Month

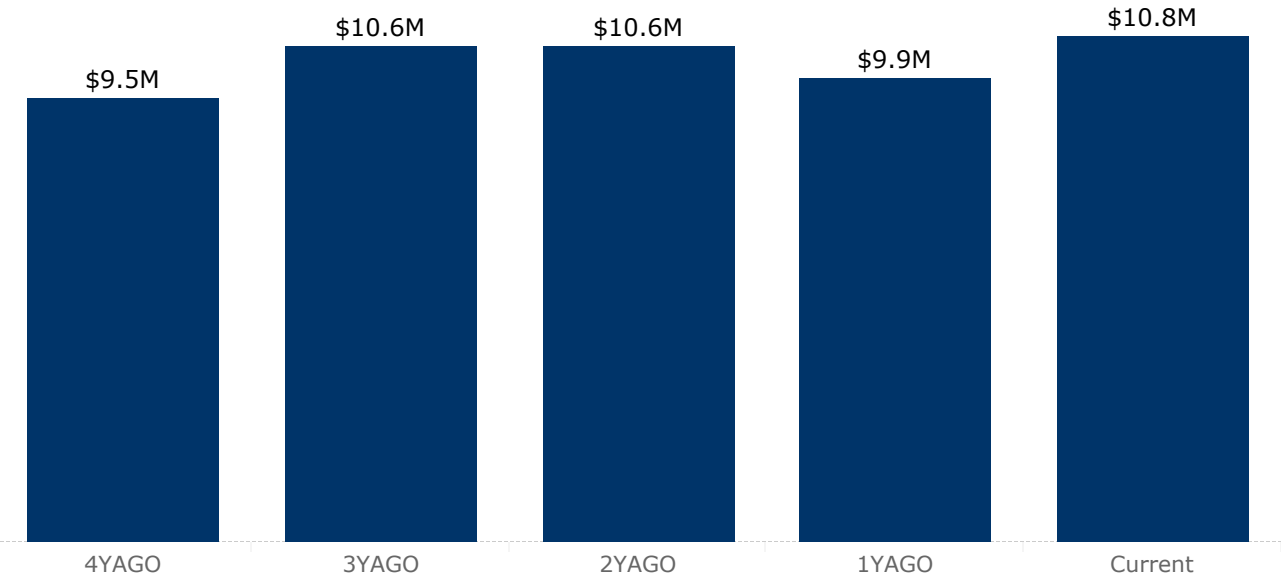
Fiscal Year 2026

| Oct    | Nov    | Dec    | Jan    | Feb     | Mar | Apr | May | Jun | Jul | Aug | Sep |
|--------|--------|--------|--------|---------|-----|-----|-----|-----|-----|-----|-----|
| \$5.6M | \$5.8M | \$6.2M | \$8.3M | \$10.8M |     |     |     |     |     |     |     |
| +30.4% | -1.8%  | -7.0%  | +0.2%  | +9.1%   |     |     |     |     |     |     |     |



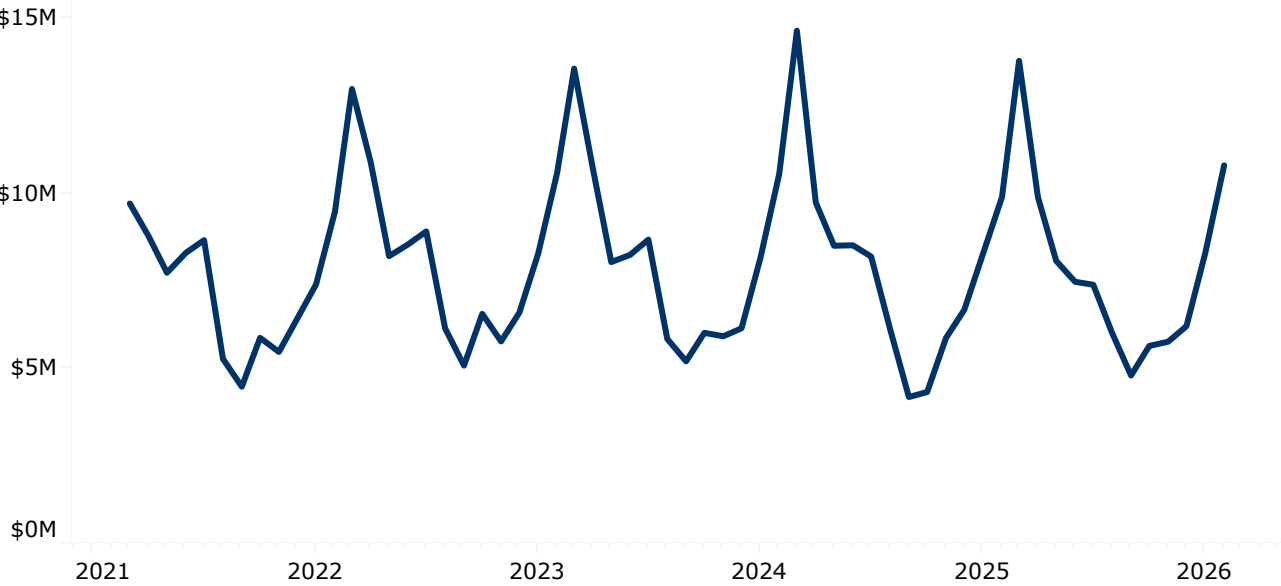
## Tourist Development Tax Collections

February 2026 vs. comparable months over the past 5 years



## Tourist Development Tax Collections

Long Term Trend





# Pinellas County Local Option Tax Collections

February 2026



## Local Option Tax Share of Total Collections

|                                                    | Oct     | Nov     | Dec     | Jan     | Feb     | Mar | Apr | May | Jun | Jul | Aug | Sep |
|----------------------------------------------------|---------|---------|---------|---------|---------|-----|-----|-----|-----|-----|-----|-----|
| Miscellaneous/Other                                | 36.04%  | 35.49%  | 38.68%  | 47.96%  | 39.54%  |     |     |     |     |     |     |     |
| Clearwater/Clearwater Beach                        | 29.11%  | 28.06%  | 26.72%  | 22.04%  | 25.80%  |     |     |     |     |     |     |     |
| St Petersburg                                      | 13.70%  | 15.71%  | 14.73%  | 13.06%  | 13.82%  |     |     |     |     |     |     |     |
| St Pete Beach/Tierra Verde                         | 9.45%   | 9.33%   | 8.52%   | 6.57%   | 8.78%   |     |     |     |     |     |     |     |
| Treasure Island                                    | 3.01%   | 2.87%   | 2.67%   | 2.25%   | 3.16%   |     |     |     |     |     |     |     |
| Oldsmar/Safety Harbor                              | 1.69%   | 1.79%   | 1.78%   | 1.62%   | 1.60%   |     |     |     |     |     |     |     |
| Dunedin                                            | 1.63%   | 1.53%   | 1.54%   | 1.38%   | 1.44%   |     |     |     |     |     |     |     |
| Madeira Beach                                      | 1.46%   | 1.29%   | 1.22%   | 1.08%   | 1.43%   |     |     |     |     |     |     |     |
| Palm Harbor                                        | 1.38%   | 1.37%   | 1.33%   | 1.48%   | 1.39%   |     |     |     |     |     |     |     |
| N Redington Beach/Redington Beach/Redington Shores | 0.95%   | 0.96%   | 0.93%   | 0.92%   | 1.02%   |     |     |     |     |     |     |     |
| Indian Rocks Beach                                 | 0.62%   | 0.63%   | 0.70%   | 0.59%   | 0.80%   |     |     |     |     |     |     |     |
| Indian Shores                                      | 0.30%   | 0.28%   | 0.42%   | 0.38%   | 0.49%   |     |     |     |     |     |     |     |
| Tarpon Springs                                     | 0.45%   | 0.44%   | 0.48%   | 0.43%   | 0.43%   |     |     |     |     |     |     |     |
| Belleair/Belleair Beach/Bluffs/Shores              | 0.21%   | 0.25%   | 0.27%   | 0.24%   | 0.30%   |     |     |     |     |     |     |     |
| Total                                              | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% |     |     |     |     |     |     |     |

Source: Pinellas County Tax Collector

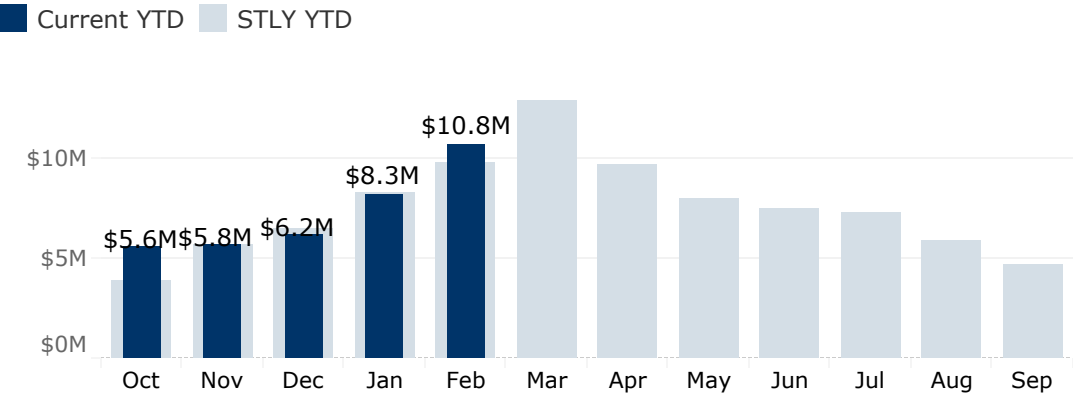
## Tourist Development Tax Collections

February 2026 vs. comparable months over the past 5 years



## Tourist Development Tax Collections by Month

Fiscal Year 2026



## Tourist Development Tax Collections

Long Term Trend

