



ST.PETE
CLEARWATER
FLORIDA

Economic Snapshot Report

February 2026 TDC Meeting - December 2025 Data

Hotel Performance Summary

Pinellas County, FL | December 2025



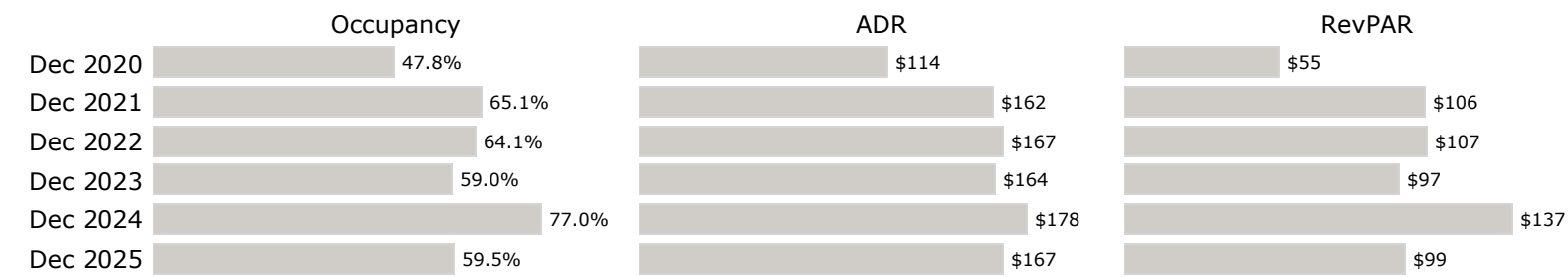
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
	59.5%	\$166.85	\$99.28	681.7K	405.6K	\$67.7M
Change vs. Previous Year	▼ -22.8%	▼ -6.3%	▼ -27.7%	▲ 3.9%	▼ -19.8%	▼ -24.9%
YTD Fiscal Year	59.9%	\$164.46	\$98.57	2.0M	1.2M	\$199.3M
YTD Change vs. Previous Year	▼ -20.1%	▼ -3.2%	▼ -22.7%	▲ 4.5%	▼ -16.6%	▼ -19.3%

Last Six Months Performance

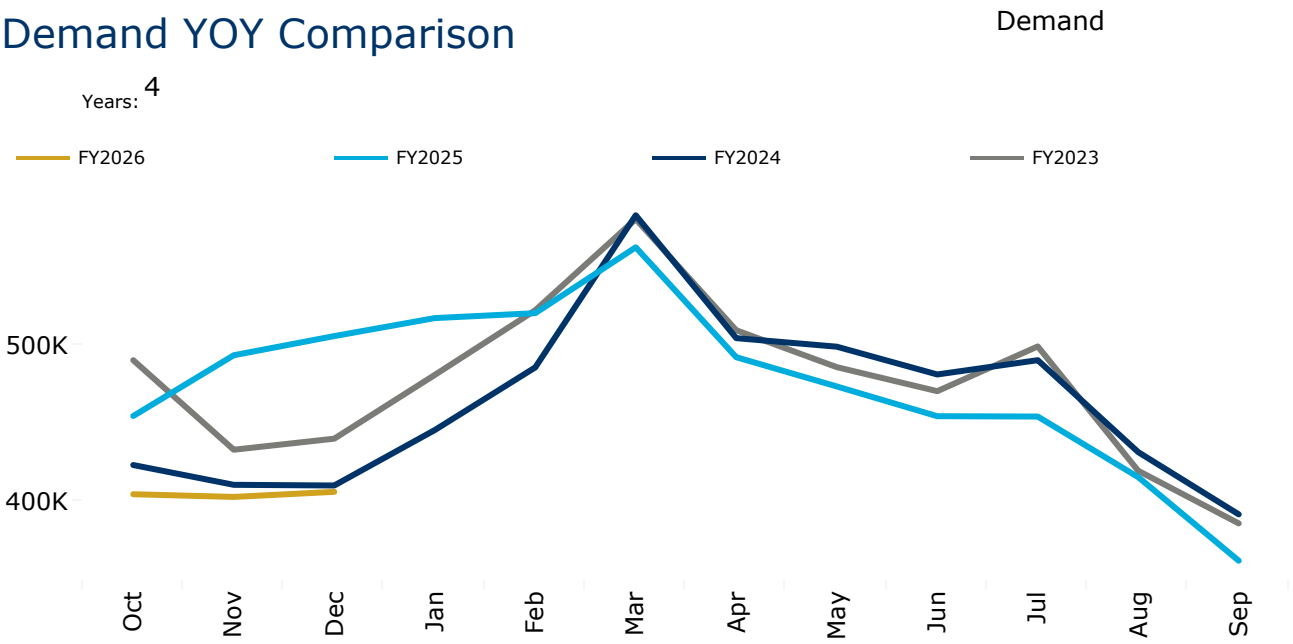


December Performance by Year

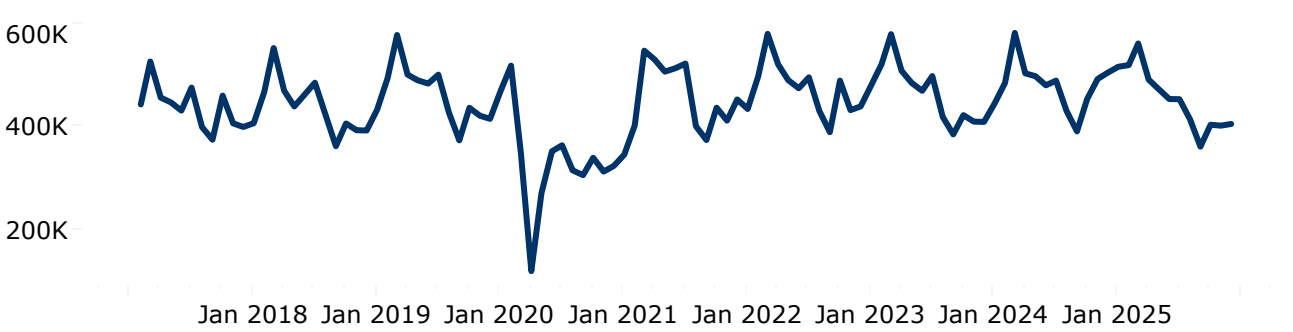
Pinellas County, FL



Demand YOY Comparison



Demand Long Term Trend

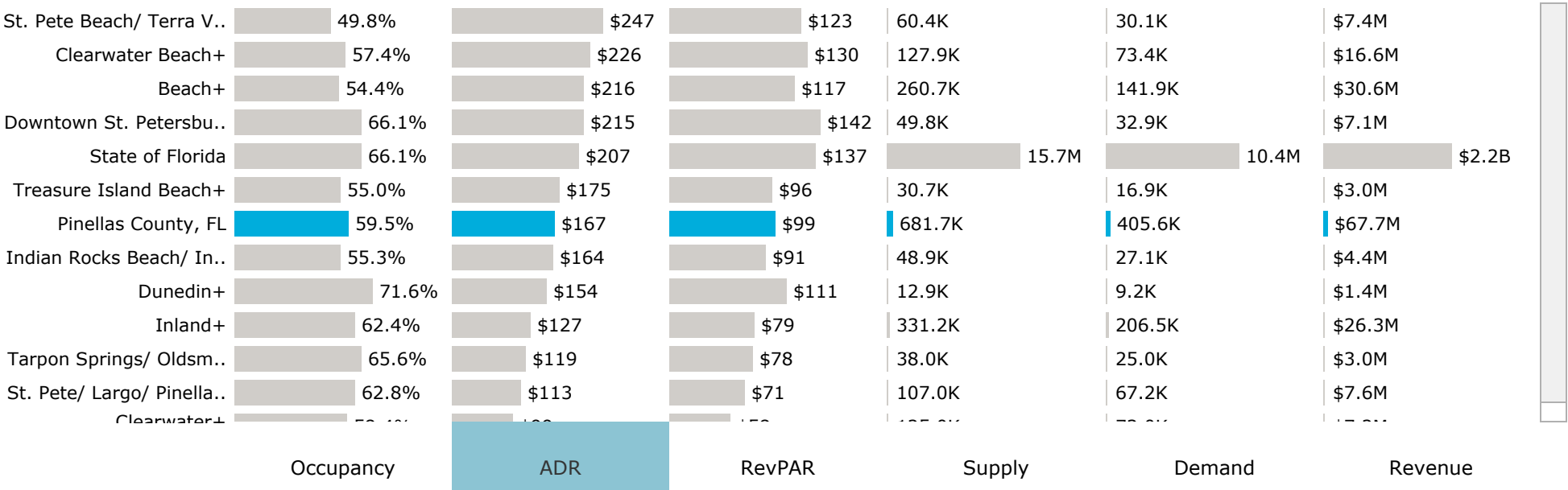


Submarkets Hotel Performance

Pinellas County, FL vs. Submarkets



December 2025, Submarket Hotel KPIs



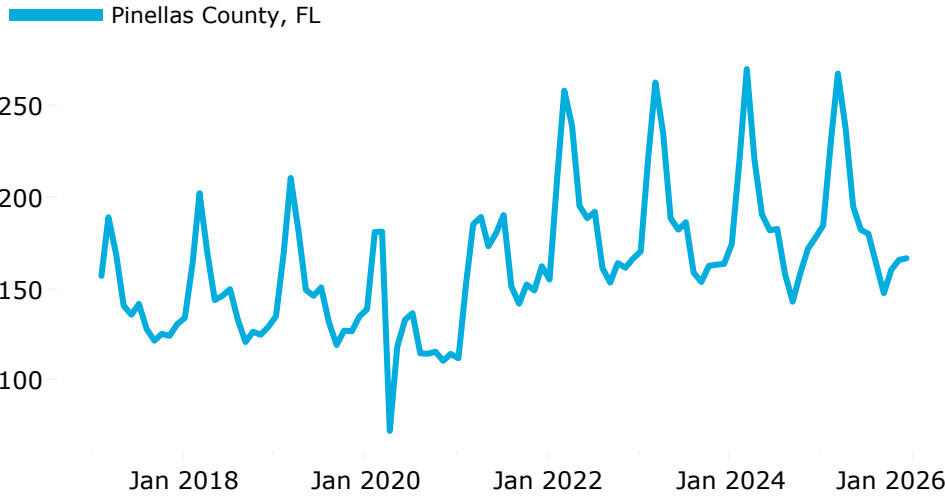
December 2025, Submarket Hotel Performance vs. Previous Year

	Occ	YOY	ADR	YOY	RevPAR	YOY	Total Supply	YOY	Rooms Sold	YOY	Room Revenue	YOY
Clearwater Beach+	57.4%	▼ -13.2%	\$226	▼ -4.5%	\$130	▼ -17.1%	127.9K	▲ 0.7%	73.4K	▼ -12.5%	\$16.6M	▼ -16.5%
Clearwater+	58.4%	▼ -32.4%	\$99	▼ -28.7%	\$58	▼ -51.8%	125.0K	▼ -4.5%	73.0K	▼ -35.5%	\$7.2M	▼ -53.9%
Downtown St. Petersburg+	66.1%	▼ -14.4%	\$215	▲ 0.2%	\$142	▼ -14.2%	49.8K	▲ 0.0%	32.9K	▼ -14.4%	\$7.1M	▼ -14.2%
Dunedin+	71.6%	▼ -8.1%	\$154	▼ -12.9%	\$111	▼ -19.9%	12.9K	▲ 0.0%	9.2K	▼ -8.1%	\$1.4M	▼ -19.9%
Indian Rocks Beach/ Indian Shores/ Madeira Beach+	55.3%	▼ -31.3%	\$164	▼ -9.3%	\$91	▼ -37.7%	48.9K	▼ -0.2%	27.1K	▼ -31.5%	\$4.4M	▼ -37.8%
Pinellas County, FL	59.5%	▼ -22.8%	\$167	▼ -6.3%	\$99	▼ -27.7%	681.7K	▲ 3.9%	405.6K	▼ -19.8%	\$67.7M	▼ -24.9%
St. Pete Beach/ Terra Verde+	49.8%	▼ -0.5%	\$247	▲ 18.7%	\$123	▲ 18.1%	60.4K	▲ 13.5%	30.1K	▲ 13.0%	\$7.4M	▲ 34.0%
St. Pete/ Largo/ Pinellas Park+	62.8%	▼ -28.1%	\$113	▼ -23.3%	\$71	▼ -44.9%	107.0K	▼ -0.6%	67.2K	▼ -28.5%	\$7.6M	▼ -45.2%
Tarpon Springs/ Oldsmar/ Palm Harbor..	65.6%	▼ -14.7%	\$119	▼ -29.0%	\$78	▼ -39.4%	38.0K	▼ -0.5%	25.0K	▼ -15.1%	\$3.0M	▼ -39.7%
Treasure Island Beach+	55.0%	▼ -27.7%	\$175	▼ -9.2%	\$96	▼ -34.3%	30.7K	▲ 26.4%	16.9K	▼ -8.6%	\$3.0M	▼ -17.0%

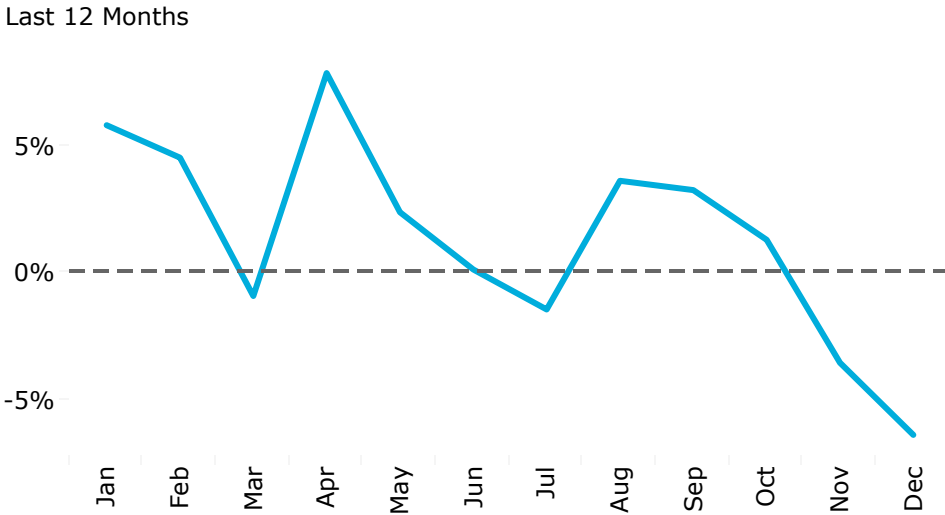
History for submarkets varies. Click on a submarket to check its history in the line charts

Source: STR

ADR Comparison



ADR vs. Same Month in Previous Year



Competitive Markets Hotel Performance

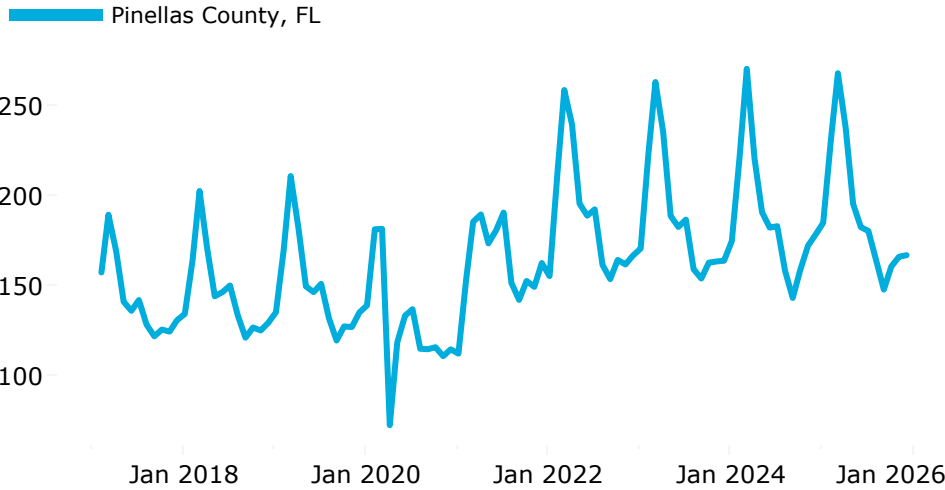
Pinellas County, FL vs. Comp. Markets



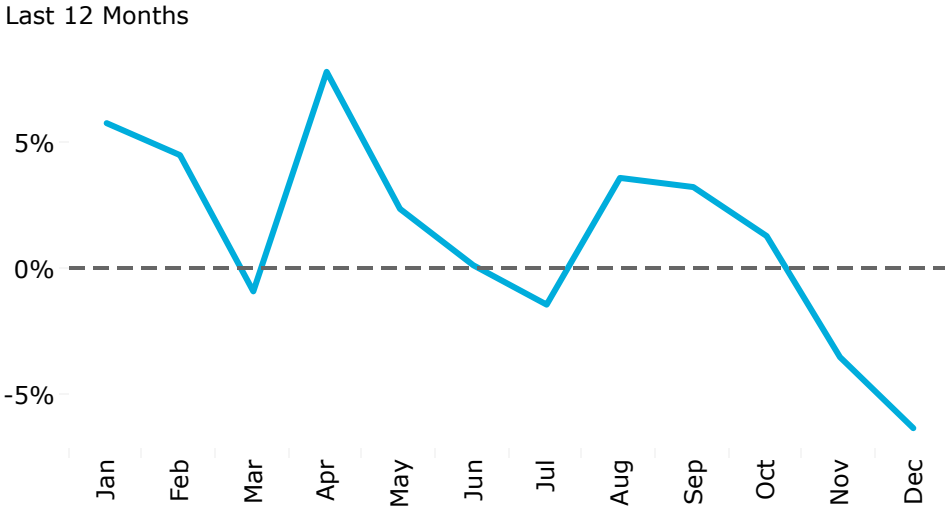
December 2025, Comp. Markets Hotel KPIs

Florida Keys	75.8%	\$414	\$314	332.6K	252.3K	\$104.3M
Palm Beach County, FL	75.4%	\$316	\$238	596.0K	449.5K	\$142.0M
Naples, FL	66.2%	\$293	\$194	98.6K	65.3K	\$19.1M
Miami/Hialeah, FL	77.0%	\$280	\$215	2.0M	1.5M	\$431.7M
Orlando	72.2%	\$220	\$158	4.5M	3.2M	\$708.3M
State of Florida	66.1%	\$207	\$137	15.7M	10.4M	\$2.2B
Sarasota/Bradenton, FL	62.2%	\$203	\$126	388.8K	241.8K	\$49.0M
Fort Lauderdale, FL	73.5%	\$195	\$143	1.2M	893.9K	\$174.5M
Pinellas County, FL	59.5%	\$167	\$99	681.7K	405.6K	\$67.7M
Fort Myers, FL	61.2%	\$157	\$96	407.0K	249.0K	\$39.1M
Hillsborough County, ..	68.3%	\$155	\$106	805.5K	550.1K	\$85.4M
Osceola County, FL	64.8%	\$153	\$99	817.3K	529.9K	\$81.1M
Bay County, FL	42.9%	\$96	\$41	339.1K	145.6K	\$13.9M
Occupancy		ADR	RevPAR	Supply	Rooms Sold	Revenue

ADR Comparison



ADR vs. Same Month in Previous Year



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

	Occ	YOY	ADR	YOY	RevPAR	YOY	Total Supply	YOY	Demand	YOY	Revenue	YOY
Bay County, FL	42.9%	▼ -2.7%	\$96	▼ -0.8%	\$41	▼ -3.4%	339.1K	▼ -0.9%	145.6K	▼ -3.5%	\$13.9M	▼ -4.3%
Florida Keys	75.8%	▲ 3.4%	\$414	▲ 4.7%	\$314	▲ 8.2%	332.6K	▲ 0.1%	252.3K	▲ 3.4%	\$104.3M	▲ 8.3%
Fort Lauderdale, FL	73.5%	▲ 0.0%	\$195	▲ 3.2%	\$143	▲ 3.2%	1.2M	▲ 0.4%	893.9K	▲ 0.4%	\$174.5M	▲ 3.5%
Fort Myers, FL	61.2%	▼ -5.4%	\$157	▼ -0.5%	\$96	▼ -5.9%	407.0K	▲ 8.0%	249.0K	▲ 2.2%	\$39.1M	▲ 1.7%
Hillsborough County..	68.3%	▼ -13.0%	\$155	▼ -9.3%	\$106	▼ -21.0%	805.5K	▲ 2.7%	550.1K	▼ -10.6%	\$85.4M	▼ -18.9%
Miami/Hialeah, FL	77.0%	▲ 0.5%	\$280	▲ 3.7%	\$215	▲ 4.2%	2.0M	▼ -1.2%	1.5M	▼ -0.7%	\$431.7M	▲ 3.0%
Naples, FL	66.2%	▲ 2.7%	\$293	▲ 6.7%	\$194	▲ 9.6%	98.6K	▲ 2.1%	65.3K	▲ 4.8%	\$19.1M	▲ 11.9%
Orlando	72.2%	▼ -1.5%	\$220	▲ 4.5%	\$158	▲ 2.9%	4.5M	▲ 0.9%	3.2M	▼ -0.6%	\$708.3M	▲ 3.8%
Osceola County, FL	64.8%	▼ -2.6%	\$153	▼ -1.2%	\$99	▼ -3.8%	817.3K	▼ -2.5%	529.9K	▼ -5.0%	\$81.1M	▼ -6.2%
Palm Beach County,..	75.4%	▲ 1.6%	\$316	▲ 9.2%	\$238	▲ 11.0%	596.0K	▼ -0.5%	449.5K	▲ 1.1%	\$142.0M	▲ 10.4%
Pinellas County, FL	59.5%	▼ -22.8%	\$167	▼ -6.3%	\$99	▼ -27.7%	681.7K	▲ 3.9%	405.6K	▼ -19.8%	\$67.7M	▼ -24.9%
Sarasota/Bradenton..	62.2%	▼ -12.7%	\$203	▲ 1.5%	\$126	▼ -11.4%	388.8K	▲ 3.0%	241.8K	▼ -10.1%	\$49.0M	▼ -8.7%
State of Florida	66.1%	▼ -5.5%	\$207	▲ 3.2%	\$137	▼ -2.5%	15.7M	▲ 1.3%	10.4M	▼ -4.2%	\$2.2B	▼ -1.2%

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

Source: STR



Pinellas County Tourist Development Tax Collections

December 2025



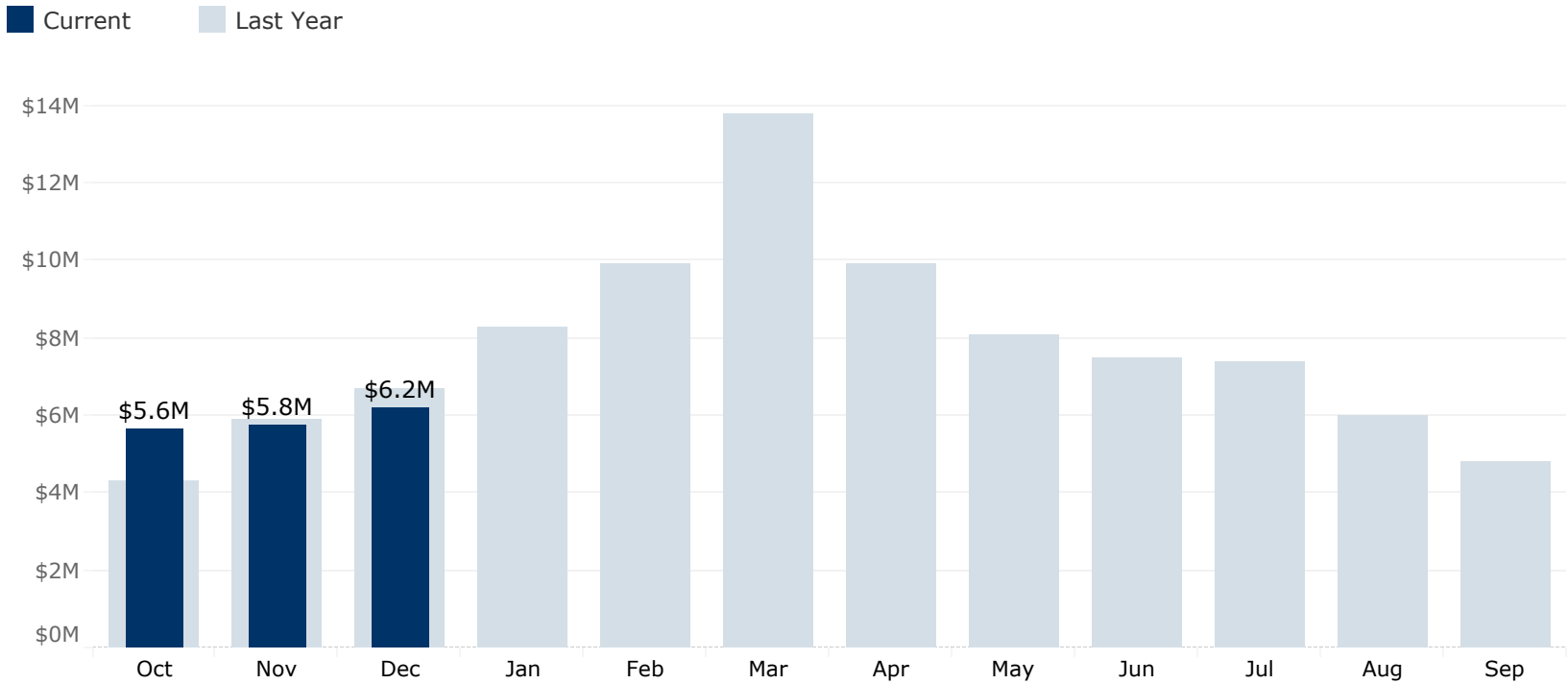
Tourist Development Tax Collections

\$6.2M
-7.0% YOY | +35.8% vs. 2019
Gross Tax Collected

Tourist Development Tax Collections by Month

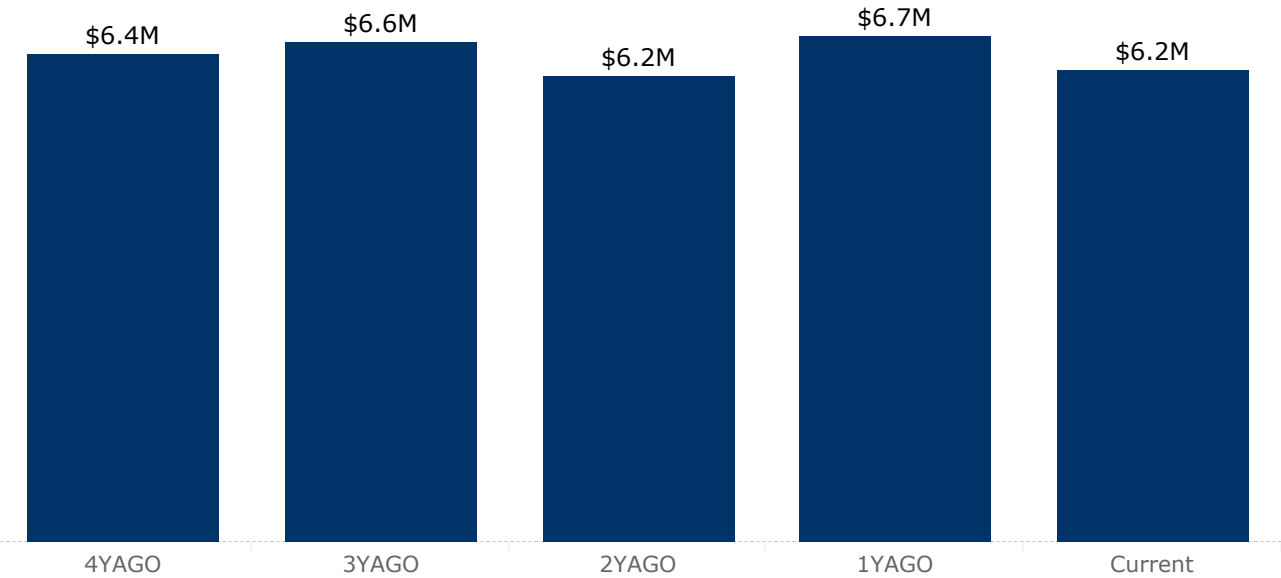
Fiscal Year 2026

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



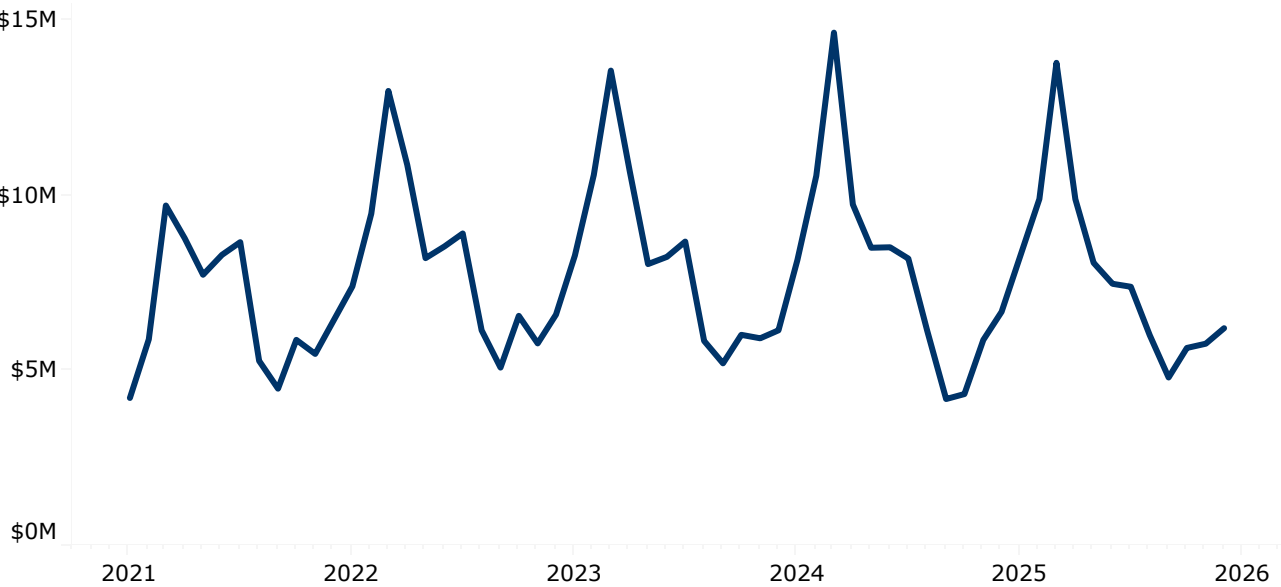
Tourist Development Tax Collections

December 2025 vs. comparable months over the past 5 years



Tourist Development Tax Collections

Long Term Trend





Pinellas County Local Option Tax Collections

December 2025



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%									
Clearwater/Clearwater Beach	29.11%	28.06%	26.72%									
St Petersburg	13.70%	15.71%	14.73%									
St Pete Beach/Tierra Verde	9.45%	9.33%	8.52%									
Treasure Island	3.01%	2.87%	2.67%									
Oldsmar/Safety Harbor	1.69%	1.79%	1.78%									
Dunedin	1.63%	1.53%	1.54%									
Palm Harbor	1.38%	1.37%	1.33%									
Madeira Beach	1.46%	1.29%	1.22%									
N Redington Beach/Redington Beach/Redington Shores	0.95%	0.96%	0.93%									
Indian Rocks Beach	0.62%	0.63%	0.70%									
Tarpon Springs	0.45%	0.44%	0.48%									
Indian Shores	0.30%	0.28%	0.42%									
Belleair/Belleair Beach/Bluffs/Shores	0.21%	0.25%	0.27%									
Total	100.00%	100.00%	100.00%									

Source: Pinellas County Tax Collector

Tourist Development Tax Collections

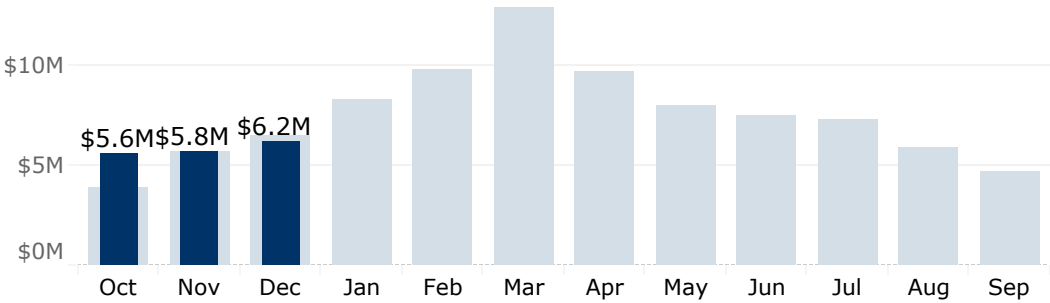
December 2025 vs. comparable months over the past 5 years



Tourist Development Tax Collections by Month

Fiscal Year 2026

Current YTD STLY YTD



Tourist Development Tax Collections

Long Term Trend

