



ST.PETE
CLEARWATER
FLORIDA

Economic Snapshot Report

July 2026 TDC Meeting - May 2026 Data

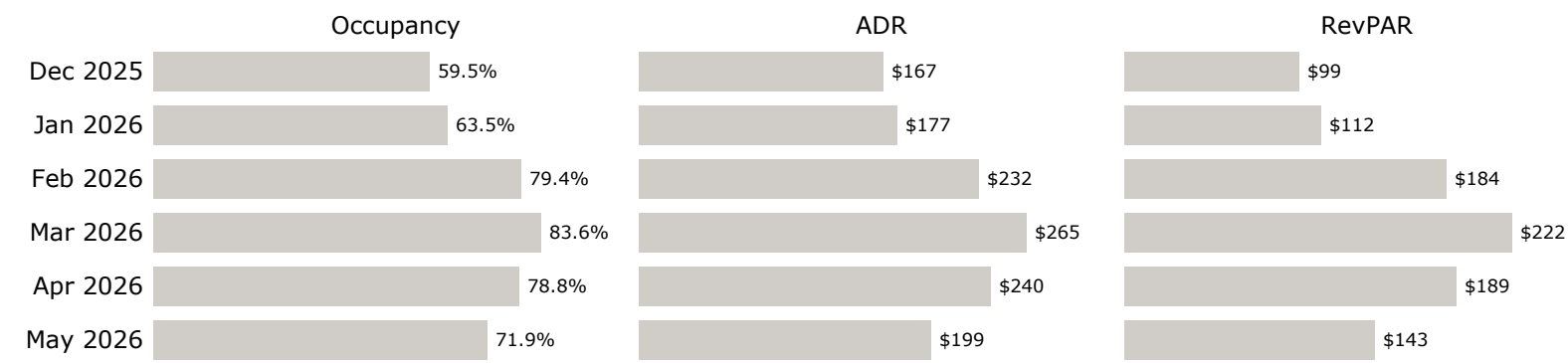
Hotel Performance Summary

Pinellas County, FL | May 2026



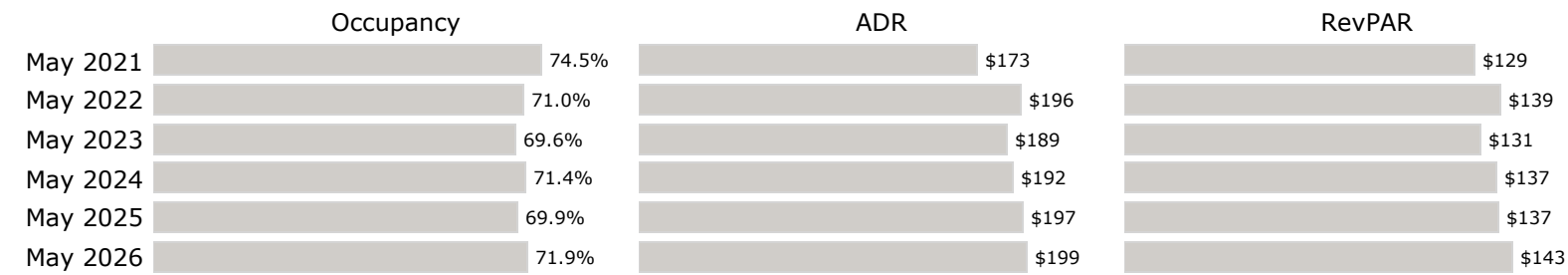
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
	71.9%	\$199.09	\$143.16	694.8K	499.6K	\$99.5M
Change vs. Previous Year	▲ 2.8%	▲ 1.3%	▲ 4.1%	▲ 3.0%	▲ 5.9%	▲ 7.2%
YTD Fiscal Year	69.5%	\$205.68	\$143.00	5.4M	3.7M	\$770.7M
YTD Change vs. Previous Year	▼ -10.0%	▼ -0.1%	▼ -10.1%	▲ 3.9%	▼ -6.5%	▼ -6.6%

Last Six Months Performance

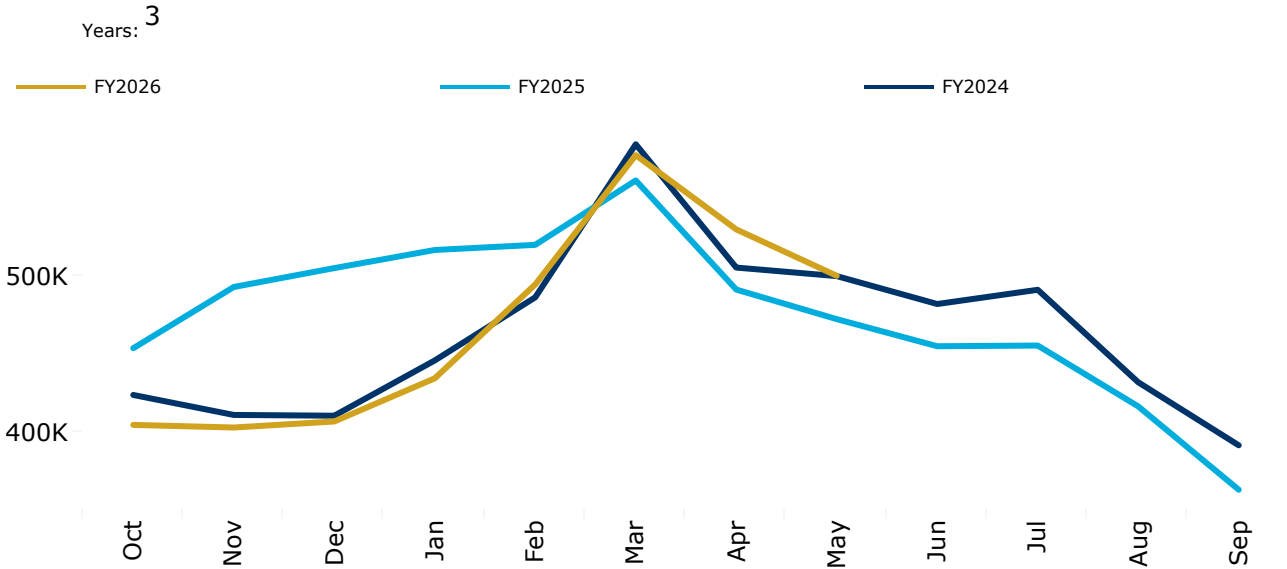


May Performance by Year

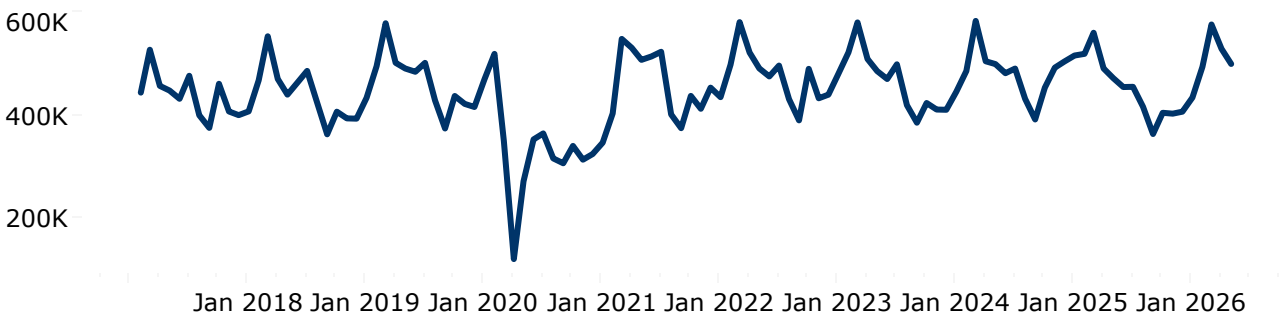
Pinellas County, FL



Demand YOY Comparison



Demand Long Term Trend



Submarkets Hotel Performance

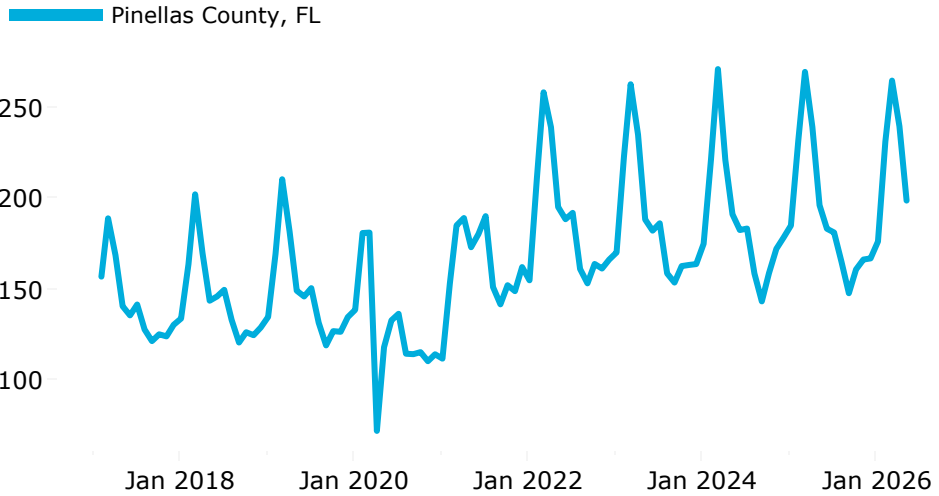
Pinellas County, FL vs. Submarkets



May 2026, Submarket Hotel KPIs

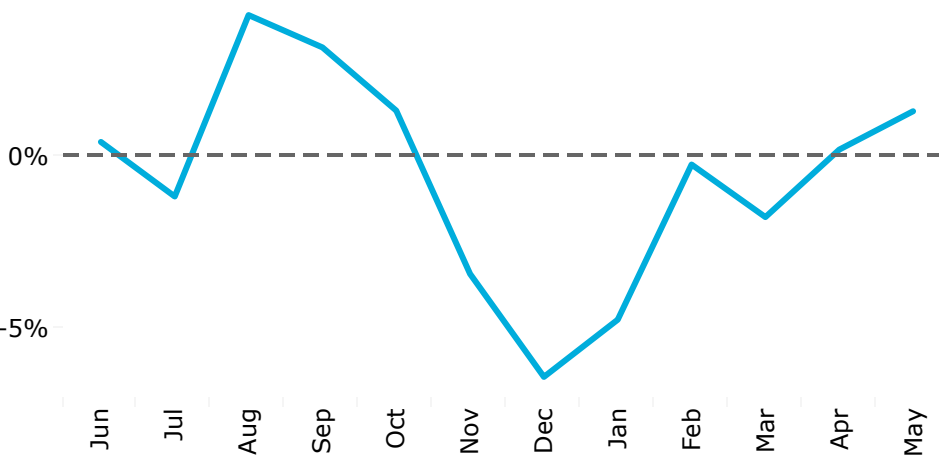
St. Pete Beach/ Terra V..	76.5%	\$295	\$226	60.6K		46.4K		\$13.7M
Clearwater Beach+	80.3%	\$277	\$222	131.2K		105.4K		\$29.2M
Beach+	76.2%	\$263	\$201	263.7K		200.9K		\$52.9M
Treasure Island Beach+	71.6%	\$221	\$158	29.0K		20.7K		\$4.6M
Downtown St. Petersbu..	75.2%	\$211	\$159	54.2K		40.8K		\$8.6M
Pinellas County, FL	71.9%	\$199	\$143	694.8K		499.6K		\$99.5M
State of Florida	68.5%	\$199	\$136	15.8M		10.8M		\$2.1B
Indian Rocks Beach/ In..	68.3%	\$190	\$130	50.2K		34.3K		\$6.5M
Dunedin+	67.4%	\$182	\$123	12.0K		8.1K		\$1.5M
Inland+	68.1%	\$136	\$93	337.7K		229.9K		\$31.3M
St. Pete/ Largo/ Pinella..	67.7%	\$124	\$84	106.1K		71.8K		\$8.9M
Tarpon Springs/ Oldsm..	68.3%	\$123	\$84	38.0K		26.0K		\$3.2M
Clearwater+	65.5%	\$109	\$71	128.9K		84.4K		\$9.2M
Occupancy		ADR	RevPAR	Supply		Demand	Revenue	

ADR Comparison



ADR vs. Same Month in Previous Year

Last 12 Months



May 2026, Submarket Hotel Performance vs. Previous Year

	Occ	YOY	ADR	YOY	RevPAR	YOY	Total Supply	YOY	Rooms Sold	YOY	Room Revenue	YOY
Clearwater Beach+	80.3%	▲ 0.2%	\$277	▲ 1.7%	\$222	▲ 1.9%	131.2K	▲ 1.6%	105.4K	▲ 1.8%	\$29.2M	▲ 3.5%
Clearwater+	65.5%	▼ -1.6%	\$109	▼ -3.2%	\$71	▼ -4.8%	128.9K	▲ 0.3%	84.4K	▼ -1.3%	\$9.2M	▼ -4.5%
Downtown St. Petersburg+	75.2%	▲ 0.6%	\$211	▲ 5.4%	\$159	▲ 6.1%	54.2K	▲ 8.8%	40.8K	▲ 9.4%	\$8.6M	▲ 15.4%
Dunedin+	67.4%	▲ 7.9%	\$182	▼ -2.7%	\$123	▲ 5.0%	12.0K	▲ 0.0%	8.1K	▲ 7.9%	\$1.5M	▲ 5.0%
Indian Rocks Beach/ Indian Shores/ Madeir..	68.3%	▼ -4.4%	\$190	▼ -1.0%	\$130	▼ -5.3%	50.2K	▲ 3.5%	34.3K	▼ -1.0%	\$6.5M	▼ -2.0%
Pinellas County, FL	71.9%	▲ 2.8%	\$199	▲ 1.3%	\$143	▲ 4.1%	694.8K	▲ 3.0%	499.6K	▲ 5.9%	\$99.5M	▲ 7.2%
St. Pete Beach/ Terra Verde+	76.5%	▲ 10.9%	\$295	▲ 6.6%	\$226	▲ 18.2%	60.6K	▲ 5.7%	46.4K	▲ 17.3%	\$13.7M	▲ 25.0%
St. Pete/ Largo/ Pinellas Park+	67.7%	▲ 2.8%	\$124	▼ -3.6%	\$84	▼ -0.9%	106.1K	▼ -0.8%	71.8K	▲ 2.0%	\$8.9M	▼ -1.7%
Tarpon Springs/ Oldsmar/ Palm Harbor..	68.3%	▲ 18.6%	\$123	▼ -4.2%	\$84	▲ 13.7%	38.0K	▲ 0.0%	26.0K	▲ 18.6%	\$3.2M	▲ 13.7%
Treasure Island Beach+	71.6%	▲ 4.9%	\$221	▼ -1.6%	\$158	▲ 3.2%	29.0K	▼ -2.0%	20.7K	▲ 2.8%	\$4.6M	▲ 1.2%

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

Source: STR

Competitive Markets Hotel Performance

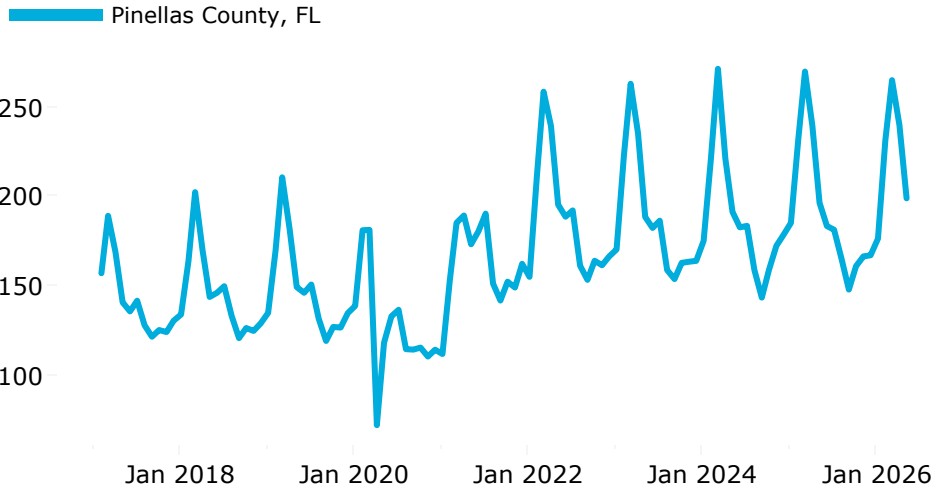
Pinellas County, FL vs. Comp. Markets



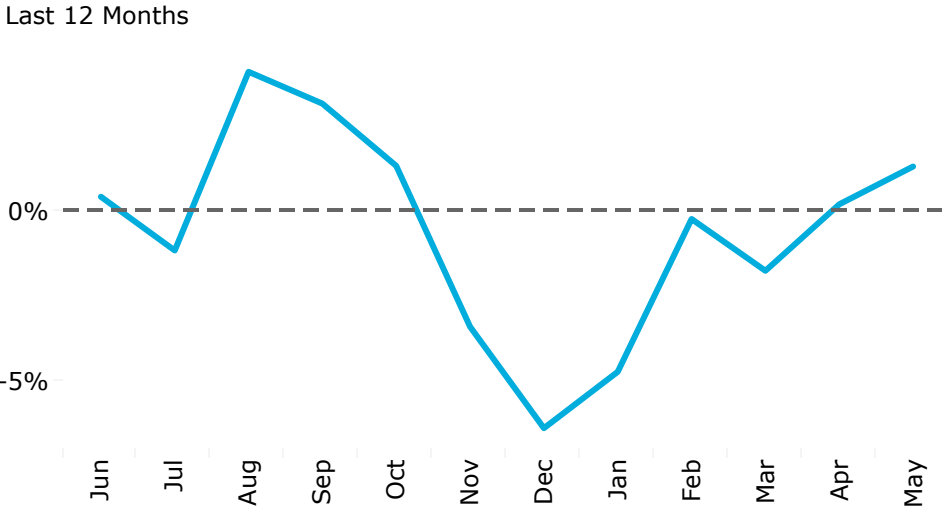
May 2026, Comp. Markets Hotel KPIs

Florida Keys	78.8%	\$343	\$271	334.1K	263.4K	\$90.4M
Naples, FL	66.0%	\$256	\$169	91.5K	60.4K	\$15.4M
Palm Beach County, FL	68.8%	\$252	\$173	591.7K	407.1K	\$102.5M
Miami/Hialeah, FL	70.4%	\$245	\$173	2.0M	1.4M	\$348.5M
Orlando	71.4%	\$207	\$147	4.5M	3.2M	\$660.0M
Sarasota/Bradenton, FL	69.7%	\$206	\$143	395.5K	275.7K	\$56.7M
Pinellas County, FL	71.9%	\$199	\$143	694.8K	499.6K	\$99.5M
State of Florida	68.5%	\$199	\$136	15.8M	10.8M	\$2.1B
Fort Lauderdale, FL	69.9%	\$180	\$125	1.2M	847.4K	\$152.1M
Hillsborough County, ..	70.9%	\$175	\$124	801.9K	568.9K	\$99.4M
Bay County, FL	70.4%	\$170	\$120	343.1K	241.5K	\$41.2M
Osceola County, FL	64.2%	\$162	\$104	811.3K	521.0K	\$84.6M
Fort Myers, FL	58.6%	\$159	\$93	412.7K	241.8K	\$38.5M
Occupancy		ADR	RevPAR	Supply	Rooms Sold	Revenue

ADR Comparison



ADR vs. Same Month in Previous Year



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

	Occ	YOY	ADR	YOY	RevPAR	YOY	Total Supply	YOY	Demand	YOY	Revenue	YOY
Bay County, FL	70.4%	▼ -2.4%	\$170	▲ 3.1%	\$120	▲ 0.6%	343.1K	▲ 0.5%	241.5K	▼ -1.9%	\$41.2M	▲ 1.1%
Florida Keys	78.8%	▲ 4.9%	\$343	▲ 4.6%	\$271	▲ 9.7%	334.1K	▲ 0.0%	263.4K	▲ 4.9%	\$90.4M	▲ 9.8%
Fort Lauderdale, FL	69.9%	▼ -0.8%	\$180	▲ 5.2%	\$125	▲ 4.4%	1.2M	▲ 1.0%	847.4K	▲ 0.2%	\$152.1M	▲ 5.4%
Fort Myers, FL	58.6%	▲ 0.8%	\$159	▲ 1.3%	\$93	▲ 2.1%	412.7K	▲ 3.0%	241.8K	▲ 3.9%	\$38.5M	▲ 5.2%
Hillsborough County..	70.9%	▲ 3.4%	\$175	▲ 1.3%	\$124	▲ 4.8%	801.9K	▼ -0.6%	568.9K	▲ 2.8%	\$99.4M	▲ 4.2%
Miami/Hialeah, FL	70.4%	▼ -1.8%	\$245	▲ 11.5%	\$173	▲ 9.5%	2.0M	▼ -0.1%	1.4M	▼ -1.9%	\$348.5M	▲ 9.4%
Naples, FL	66.0%	▲ 1.5%	\$256	▲ 22.2%	\$169	▲ 24.1%	91.5K	▼ -5.3%	60.4K	▼ -3.8%	\$15.4M	▲ 17.6%
Orlando	71.4%	▲ 2.9%	\$207	▲ 3.7%	\$147	▲ 6.8%	4.5M	▼ -0.6%	3.2M	▲ 2.3%	\$660.0M	▲ 6.1%
Osceola County, FL	64.2%	▲ 0.6%	\$162	▲ 9.2%	\$104	▲ 9.9%	811.3K	▼ -3.0%	521.0K	▼ -2.4%	\$84.6M	▲ 6.5%
Palm Beach County,..	68.8%	▲ 0.6%	\$252	▲ 6.2%	\$173	▲ 6.8%	591.7K	▼ -1.5%	407.1K	▼ -1.0%	\$102.5M	▲ 5.2%
Pinellas County, FL	71.9%	▲ 2.8%	\$199	▲ 1.3%	\$143	▲ 4.1%	694.8K	▲ 3.0%	499.6K	▲ 5.9%	\$99.5M	▲ 7.2%
Sarasota/Bradenton..	69.7%	▲ 7.0%	\$206	▲ 5.1%	\$143	▲ 12.5%	395.5K	▲ 0.8%	275.7K	▲ 7.9%	\$56.7M	▲ 13.5%
State of Florida	68.5%	▲ 1.0%	\$199	▲ 4.4%	\$136	▲ 5.4%	15.8M	▲ 0.4%	10.8M	▲ 1.4%	\$2.1B	▲ 5.9%

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

Source: STR



Pinellas County Tourist Development Tax Collections

May 2026

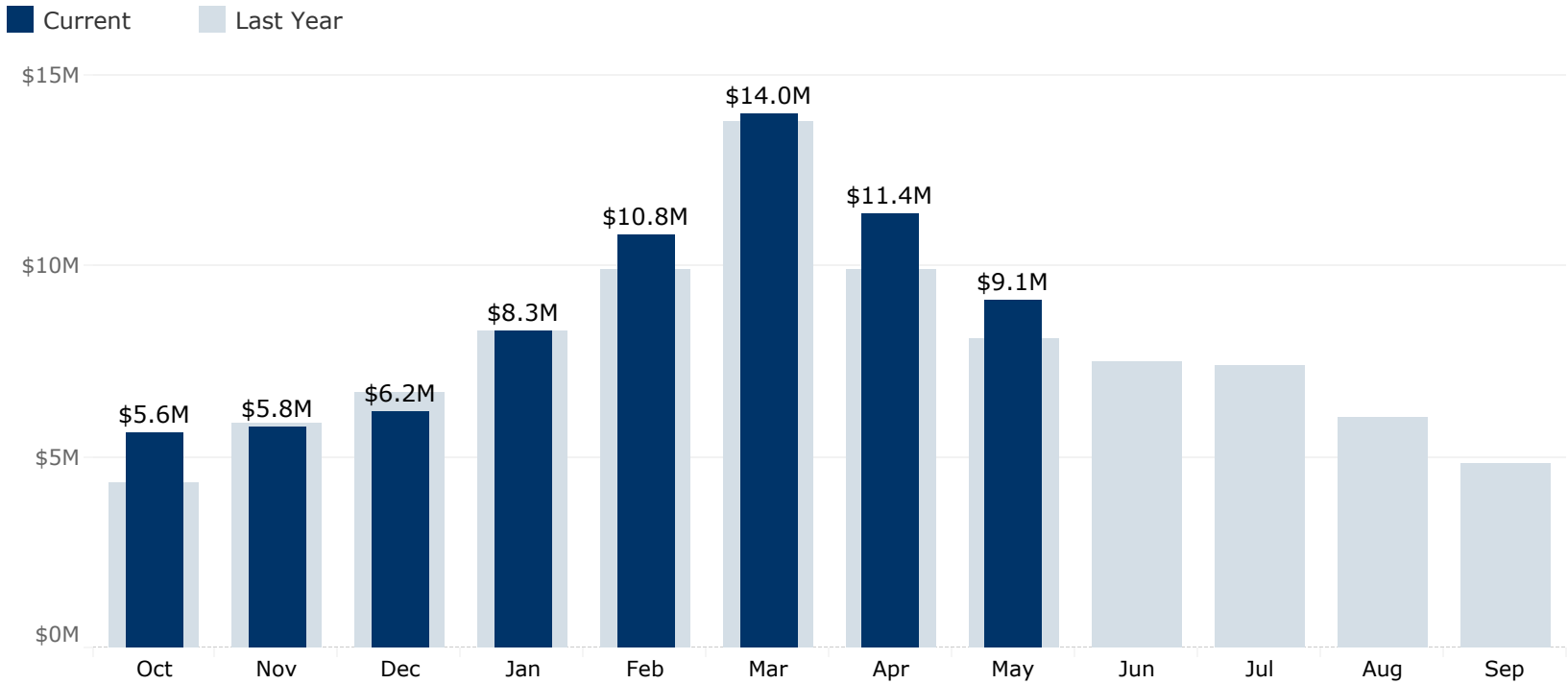


Tourist Development Tax Collections
\$9.1M
+12.8% YOY | +68.9% vs. 2019
Gross Tax Collected

Tourist Development Tax Collections by Month

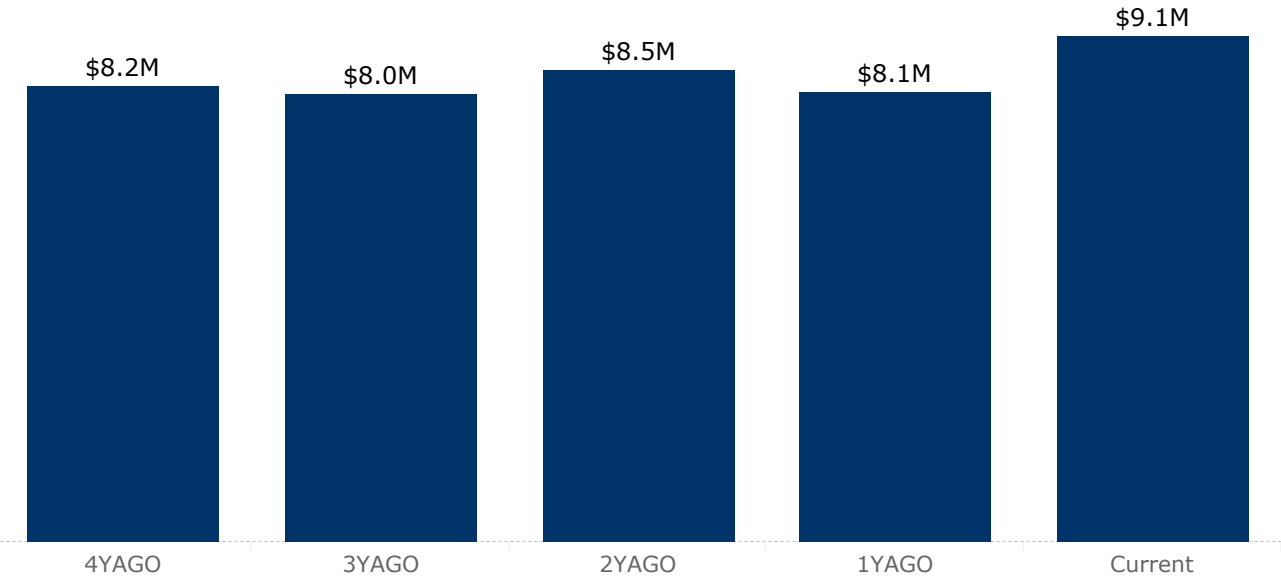
Fiscal Year 2026

Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
\$5.6M	\$5.8M	\$6.2M	\$8.3M	\$10.8M	\$14.0M	\$11.4M	\$9.1M				
+30.4%	-1.8%	-7.0%	+0.2%	+9.1%	+1.5%	+14.9%	+12.8%				



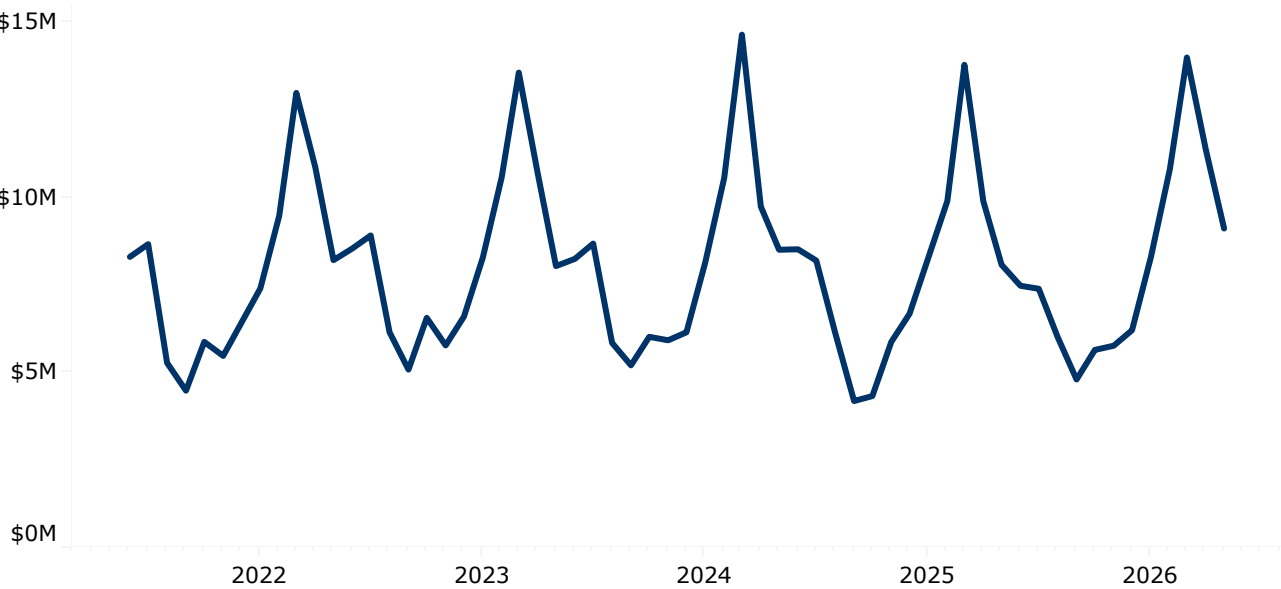
Tourist Development Tax Collections

May 2026 vs. comparable months over the past 5 years



Tourist Development Tax Collections

Long Term Trend





Pinellas County Local Option Tax Collections

May 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%	35.32%	34.56%	36.70%				
Clearwater/Clearwater Beach	29.11%	28.06%	26.72%	22.04%	25.80%	28.99%	30.54%	29.90%				
St Petersburg	13.70%	15.71%	14.73%	13.06%	13.82%	11.79%	11.94%	11.28%				
St Pete Beach/Tierra Verde	9.45%	9.33%	8.52%	6.57%	8.78%	10.82%	11.58%	11.09%				
Treasure Island	3.01%	2.87%	2.67%	2.25%	3.16%	3.57%	3.39%	3.31%				
Madeira Beach	1.46%	1.29%	1.22%	1.08%	1.43%	1.62%	1.34%	1.36%				
Oldsmar/Safety Harbor	1.69%	1.79%	1.78%	1.62%	1.60%	1.58%	1.38%	1.27%				
Dunedin	1.63%	1.53%	1.54%	1.38%	1.44%	1.46%	1.19%	1.19%				
N Redington Beach/Redington Beach/Redington Shores	0.95%	0.96%	0.93%	0.92%	1.02%	1.27%	1.18%	1.18%				
Palm Harbor	1.38%	1.37%	1.33%	1.48%	1.39%	1.00%	1.00%	0.97%				
Indian Rocks Beach	0.62%	0.63%	0.70%	0.59%	0.80%	1.20%	0.88%	0.72%				
Tarpon Springs	0.45%	0.44%	0.48%	0.43%	0.43%	0.44%	0.36%	0.37%				
Indian Shores	0.30%	0.28%	0.42%	0.38%	0.49%	0.69%	0.38%	0.35%				
Belleair/Belleair Beach/Bluffs/Shores	0.21%	0.25%	0.27%	0.24%	0.30%	0.26%	0.28%	0.30%				
Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%				

Source: Pinellas County Tax Collector

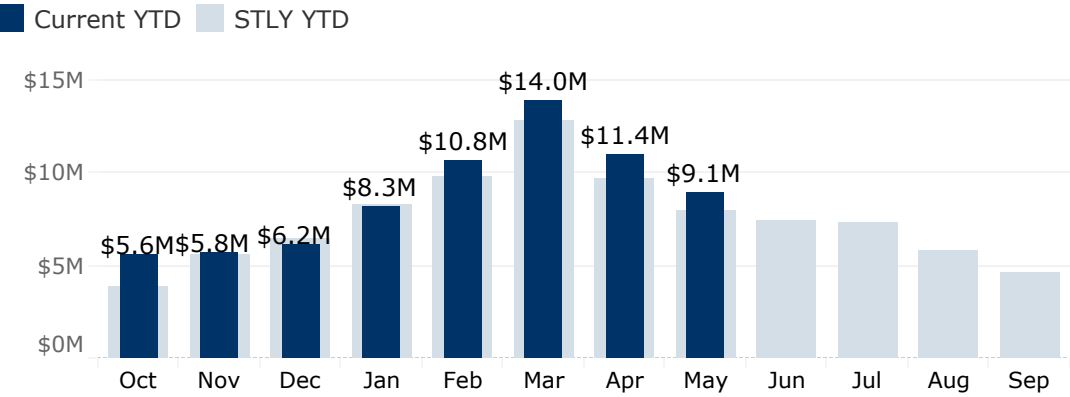
Tourist Development Tax Collections

May 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

