



ST.PETE
CLEARWATER
FLORIDA

Economic Snapshot Report

September 2026 TDC Meeting - July 2026 Data

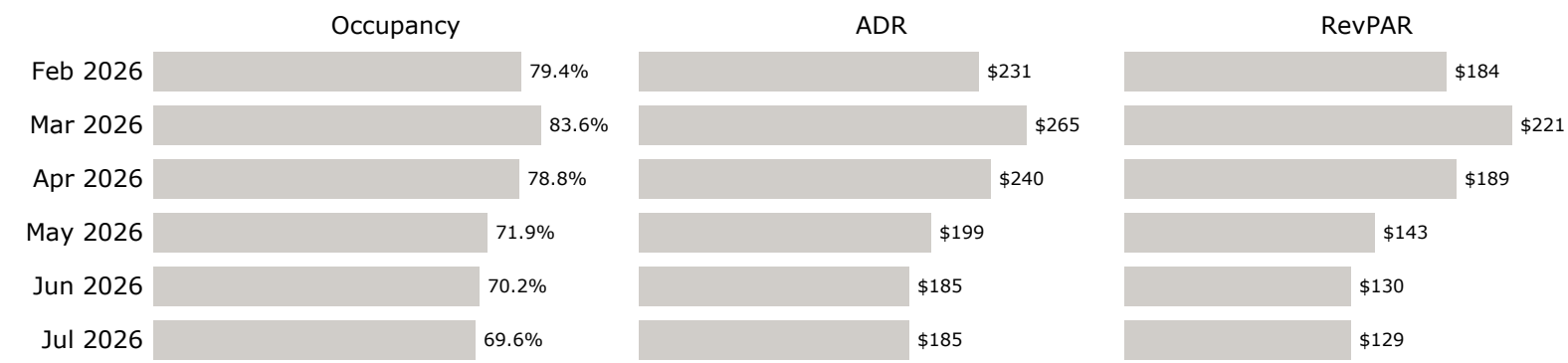
Hotel Performance Summary

Pinellas County, FL | July 2026



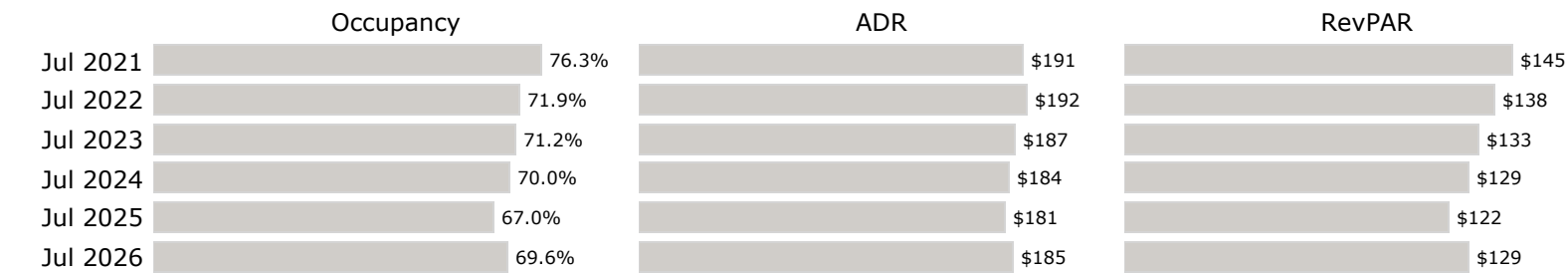
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
	69.6%	\$185.23	\$128.83	702.9K	488.9K	\$90.6M
Change vs. Previous Year	▲ 3.8%	▲ 2.1%	▲ 6.0%	▲ 3.2%	▲ 7.1%	▲ 9.4%
YTD Fiscal Year	69.6%	\$201.35	\$140.11	6.8M	4.7M	\$950.9M
YTD Change vs. Previous Year	▼ -7.7%	▲ 0.0%	▼ -7.7%	▲ 3.7%	▼ -4.2%	▼ -4.3%

Last Six Months Performance

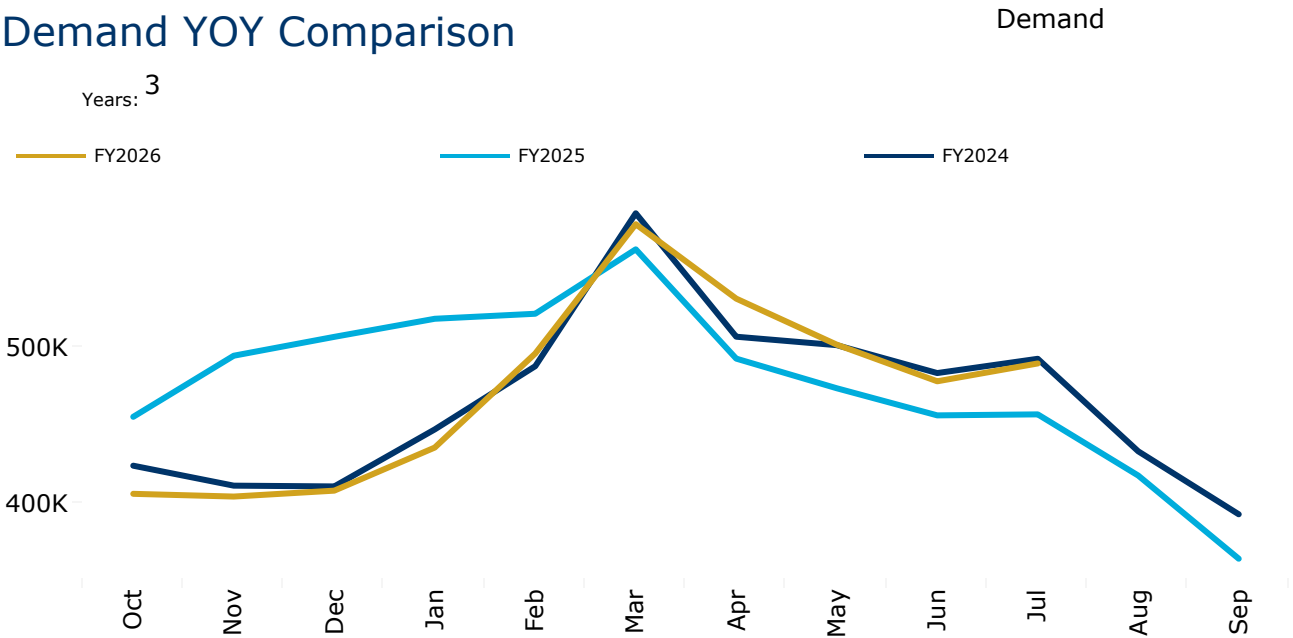


July Performance by Year

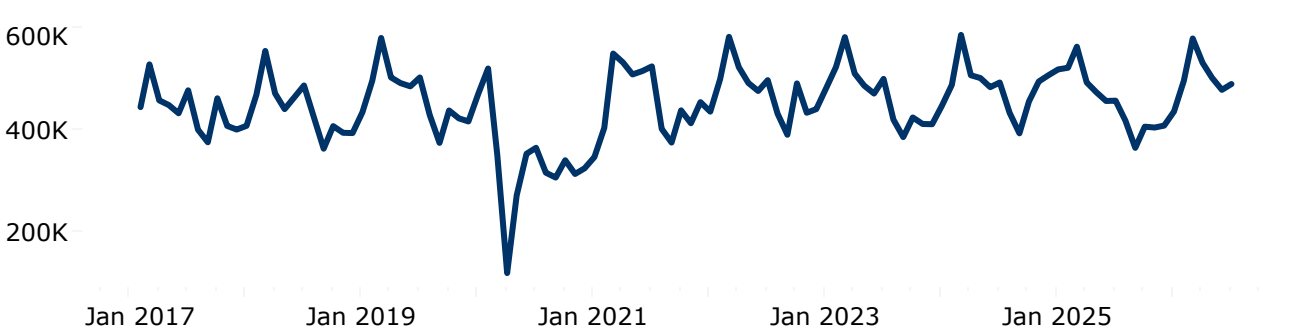
Pinellas County, FL



Demand YOY Comparison



Demand Long Term Trend



Submarkets Hotel Performance

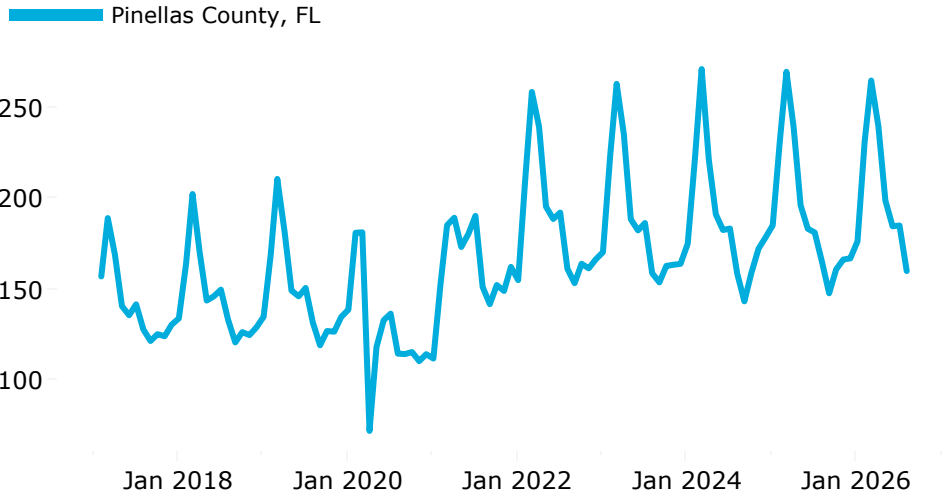
Pinellas County, FL vs. Submarkets



July 2026, Submarket Hotel KPIs

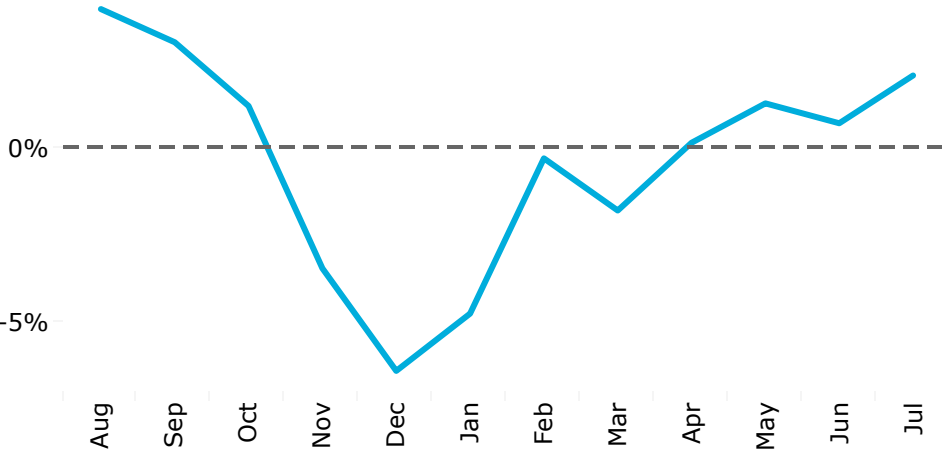
St. Pete Beach/ Terra V..	73.0%	\$288	\$210	66.8K	48.7K	\$14.0M
Clearwater Beach+	77.8%	\$262	\$204	131.3K	102.1K	\$26.7M
Beach+	74.3%	\$252	\$187	270.0K	200.5K	\$50.6M
Treasure Island Beach+	71.1%	\$222	\$158	29.0K	20.6K	\$4.6M
Pinellas County, FL	69.6%	\$185	\$129	702.9K	488.9K	\$90.6M
State of Florida	68.1%	\$180	\$122	15.8M	10.8M	\$1.9B
Downtown St. Petersbu..	68.3%	\$179	\$122	54.2K	37.0K	\$6.6M
Indian Rocks Beach/ In..	69.8%	\$176	\$123	50.2K	35.0K	\$6.2M
Dunedin+	66.7%	\$162	\$108	12.0K	8.0K	\$1.3M
Inland+	65.8%	\$119	\$78	337.9K	222.4K	\$26.5M
St. Pete/ Largo/ Pinella..	68.1%	\$110	\$75	106.1K	72.3K	\$7.9M
Tarpon Springs/ Oldsm..	60.5%	\$106	\$64	38.3K	23.2K	\$2.5M
Clearwater+	66.3%	\$122	\$89	122.9K	82.9K	\$8.2M
Occupancy		ADR	RevPAR	Supply	Demand	Revenue

ADR Comparison



ADR vs. Same Month in Previous Year

Last 12 Months



July 2026, Submarket Hotel Performance vs. Previous Year

	Occ	YOY	ADR	YOY	RevPAR	YOY	Total Supply	YOY	Rooms Sold	YOY	Room Revenue	YOY
Clearwater Beach+	77.8%	▲ 1.4%	\$262	▲ 0.2%	\$204	▲ 1.7%	131.3K	▲ 2.0%	102.1K	▲ 3.4%	\$26.7M	▲ 3.7%
Clearwater+	64.3%	▲ 1.0%	\$99	▼ -2.6%	\$64	▼ -1.6%	128.9K	▲ 3.3%	82.9K	▲ 4.3%	\$8.2M	▲ 1.6%
Downtown St. Petersburg+	68.3%	▲ 9.4%	\$179	▲ 15.6%	\$122	▲ 26.4%	54.2K	▲ 4.0%	37.0K	▲ 13.8%	\$6.6M	▲ 31.5%
Dunedin+	66.7%	▲ 5.4%	\$162	▲ 5.5%	\$108	▲ 11.2%	12.0K	▲ 0.0%	8.0K	▲ 5.4%	\$1.3M	▲ 11.2%
Indian Rocks Beach/ Indian Shores/ Madeir..	69.8%	▲ 0.1%	\$176	▲ 0.4%	\$123	▲ 0.5%	50.2K	▲ 3.5%	35.0K	▲ 3.6%	\$6.2M	▲ 4.1%
Pinellas County, FL	69.6%	▲ 3.8%	\$185	▲ 2.1%	\$129	▲ 6.0%	702.9K	▲ 3.2%	488.9K	▲ 7.1%	\$90.6M	▲ 9.4%
St. Pete Beach/ Terra Verde+	73.0%	▲ 7.3%	\$288	▲ 3.5%	\$210	▲ 11.0%	66.8K	▲ 16.6%	48.7K	▲ 25.0%	\$14.0M	▲ 29.4%
St. Pete/ Largo/ Pinellas Park+	68.1%	▲ 7.9%	\$110	▼ -3.9%	\$75	▲ 3.7%	106.1K	▼ -0.2%	72.3K	▲ 7.7%	\$7.9M	▲ 3.5%
Tarpon Springs/ Oldsmar/ Palm Harbor..	60.5%	▲ 4.6%	\$106	▼ -2.6%	\$64	▲ 1.9%	38.3K	▲ 0.7%	23.2K	▲ 5.3%	\$2.5M	▲ 2.5%
Treasure Island Beach+	71.1%	▲ 3.7%	\$222	▲ 0.7%	\$158	▲ 4.4%	29.0K	▼ -2.0%	20.6K	▲ 1.6%	\$4.6M	▲ 2.3%

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

Source: STR

Competitive Markets Hotel Performance

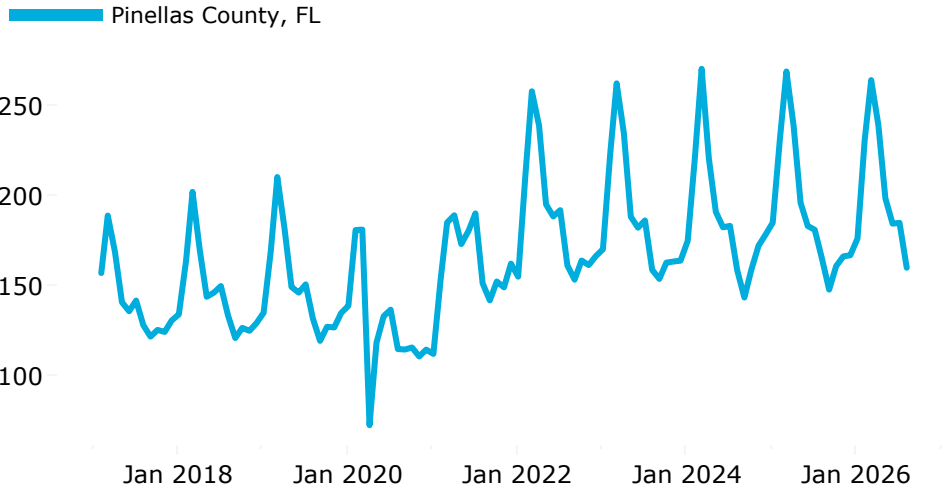
Pinellas County, FL vs. Comp. Markets



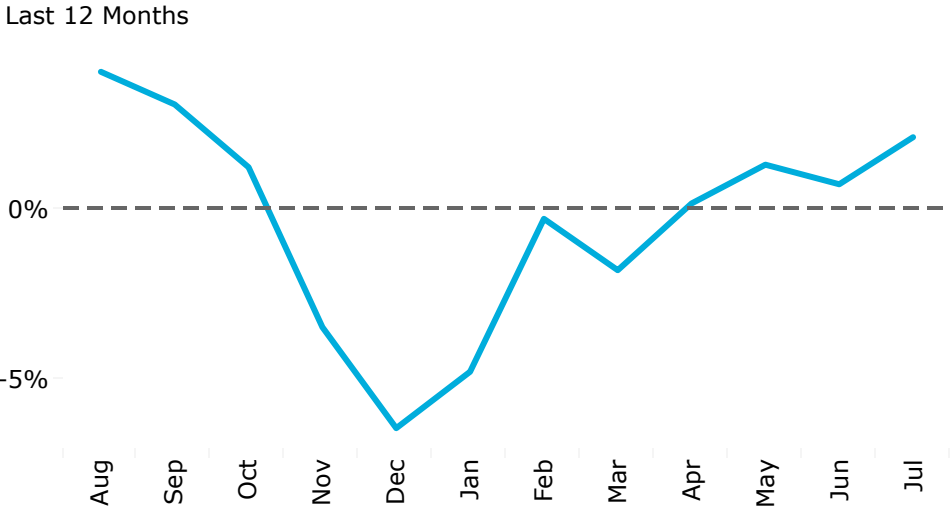
July 2026, Comp. Markets Hotel KPIs

Florida Keys	80.4%	\$298	\$239	334.1K	268.8K	\$80.0M
Naples, FL	60.2%	\$224	\$135	92.0K	55.4K	\$12.4M
Bay County, FL	80.2%	\$211	\$169	343.2K	275.1K	\$58.0M
Miami/Hialeah, FL	66.4%	\$208	\$138	2.0M	1.3M	\$280.6M
Palm Beach County, FL	64.3%	\$200	\$129	591.8K	380.7K	\$76.1M
Sarasota/Bradenton, FL	66.0%	\$191	\$126	395.0K	260.6K	\$49.6M
Pinellas County, FL	69.6%	\$185	\$129	702.9K	488.9K	\$90.6M
Orlando	71.9%	\$184	\$132	4.5M	3.2M	\$593.8M
State of Florida	68.1%	\$180	\$122	15.8M	10.8M	\$1.9B
Fort Lauderdale, FL	66.7%	\$155	\$103	1.2M	806.5K	\$124.8M
Fort Myers, FL	58.2%	\$149	\$87	413.4K	240.6K	\$35.9M
Hillsborough County, ..	67.7%	\$145	\$98	800.8K	542.5K	\$78.8M
Osceola County, FL	65.3%	\$142	\$93	805.6K	526.0K	\$74.8M
Occupancy		ADR	RevPAR	Supply	Rooms Sold	Revenue

ADR Comparison



ADR vs. Same Month in Previous Year



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

	Occ	YOY	ADR	YOY	RevPAR	YOY	Total Supply	YOY	Demand	YOY	Revenue	YOY
Bay County, FL	80.2%	▲ 2.2%	\$211	▲ 4.8%	\$169	▲ 7.2%	343.2K	▼ -0.3%	275.1K	▲ 2.0%	\$58.0M	▲ 6.9%
Florida Keys	80.4%	▲ 6.0%	\$298	▲ 3.3%	\$239	▲ 9.5%	334.1K	▼ -0.1%	268.8K	▲ 6.0%	\$80.0M	▲ 9.4%
Fort Lauderdale, FL	66.7%	▲ 0.4%	\$155	▲ 8.4%	\$103	▲ 8.8%	1.2M	▲ 0.7%	806.5K	▲ 1.1%	\$124.8M	▲ 9.6%
Fort Myers, FL	58.2%	▲ 2.7%	\$149	▲ 0.3%	\$87	▲ 3.0%	413.4K	▲ 2.1%	240.6K	▲ 4.9%	\$35.9M	▲ 5.2%
Hillsborough County..	67.7%	▲ 1.4%	\$145	▲ 1.2%	\$98	▲ 2.6%	800.8K	▼ -1.4%	542.5K	▼ -0.1%	\$78.8M	▲ 1.2%
Miami/Hialeah, FL	66.4%	▼ -4.0%	\$208	▲ 22.5%	\$138	▲ 17.6%	2.0M	▲ 2.0%	1.3M	▼ -2.1%	\$280.6M	▲ 20.0%
Naples, FL	60.2%	▼ -3.0%	\$224	▲ 28.2%	\$135	▲ 24.3%	92.0K	▼ -4.7%	55.4K	▼ -7.6%	\$12.4M	▲ 18.4%
Orlando	71.9%	▲ 1.3%	\$184	▲ 1.1%	\$132	▲ 2.4%	4.5M	▼ -0.3%	3.2M	▲ 0.9%	\$593.8M	▲ 2.0%
Osceola County, FL	65.3%	▲ 0.5%	\$142	▲ 6.9%	\$93	▲ 7.4%	805.6K	▼ -3.7%	526.0K	▼ -3.3%	\$74.8M	▲ 3.4%
Palm Beach County,..	64.3%	▲ 5.7%	\$200	▲ 10.3%	\$129	▲ 16.6%	591.8K	▼ -1.5%	380.7K	▲ 4.1%	\$76.1M	▲ 14.8%
Pinellas County, FL	69.6%	▲ 3.8%	\$185	▲ 2.1%	\$129	▲ 6.0%	702.9K	▲ 3.2%	488.9K	▲ 7.1%	\$90.6M	▲ 9.4%
Sarasota/Bradenton..	66.0%	▲ 0.8%	\$191	▲ 5.9%	\$126	▲ 6.7%	395.0K	▲ 2.0%	260.6K	▲ 2.7%	\$49.6M	▲ 8.8%
State of Florida	68.1%	▲ 1.3%	\$180	▲ 5.2%	\$122	▲ 6.6%	15.8M	▲ 0.7%	10.8M	▲ 2.0%	\$1.9B	▲ 7.3%

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

Source: STR



Pinellas County Tourist Development Tax Collections

July 2026

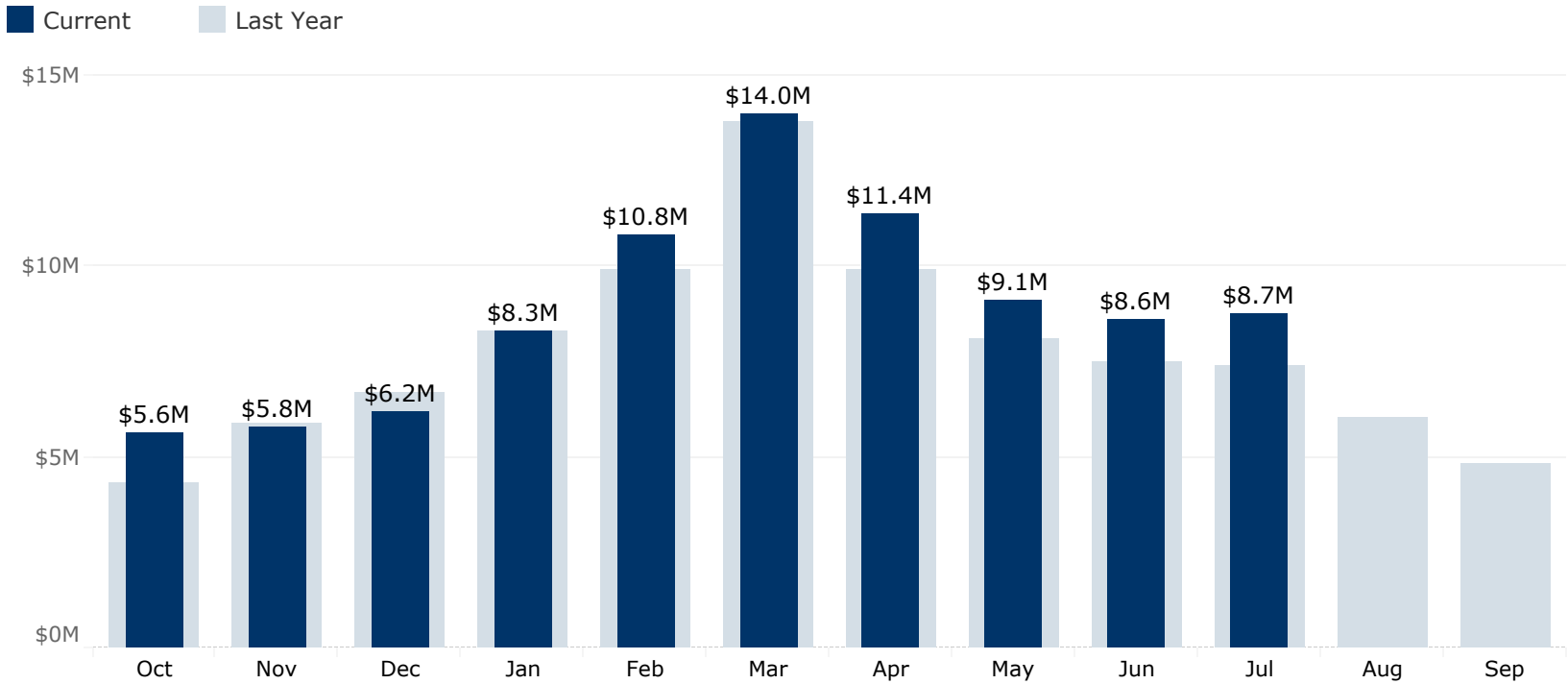


Tourist Development Tax Collections
\$8.7M
+18.2% YOY | +48.4% vs. 2019
Gross Tax Collected

Tourist Development Tax Collections by Month

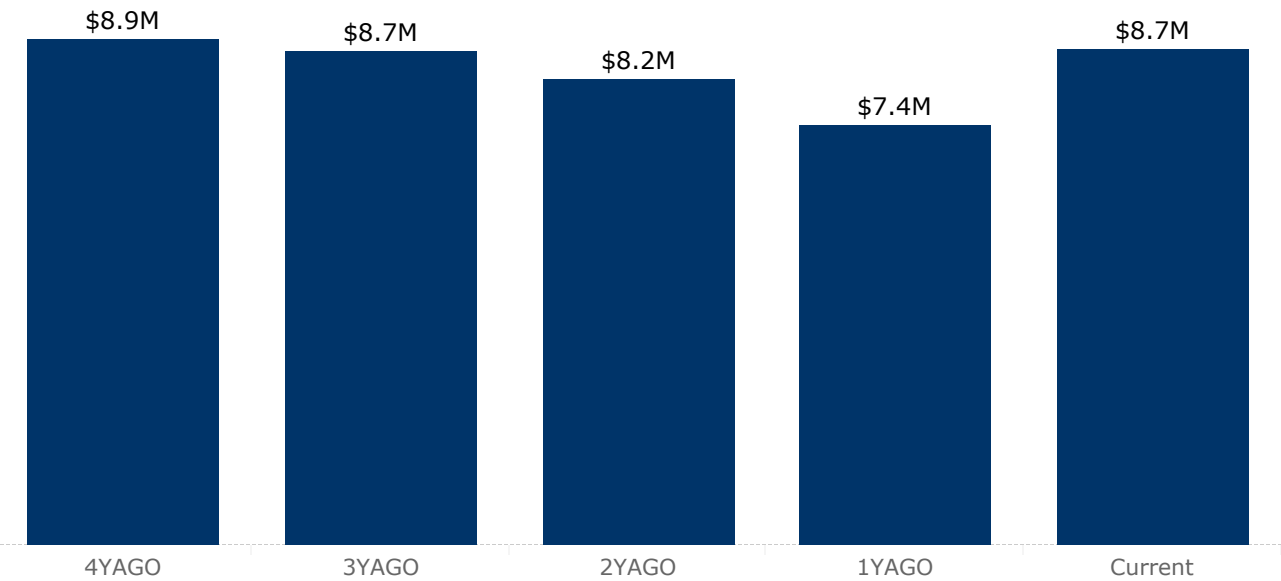
Fiscal Year 2026

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	\$8.6M	\$8.7M		
+30.4%	-1.8%	-7.0%	+0.2%	+9.1%	+1.5%	+14.9%	+12.8%	+14.8%	+18.2%		



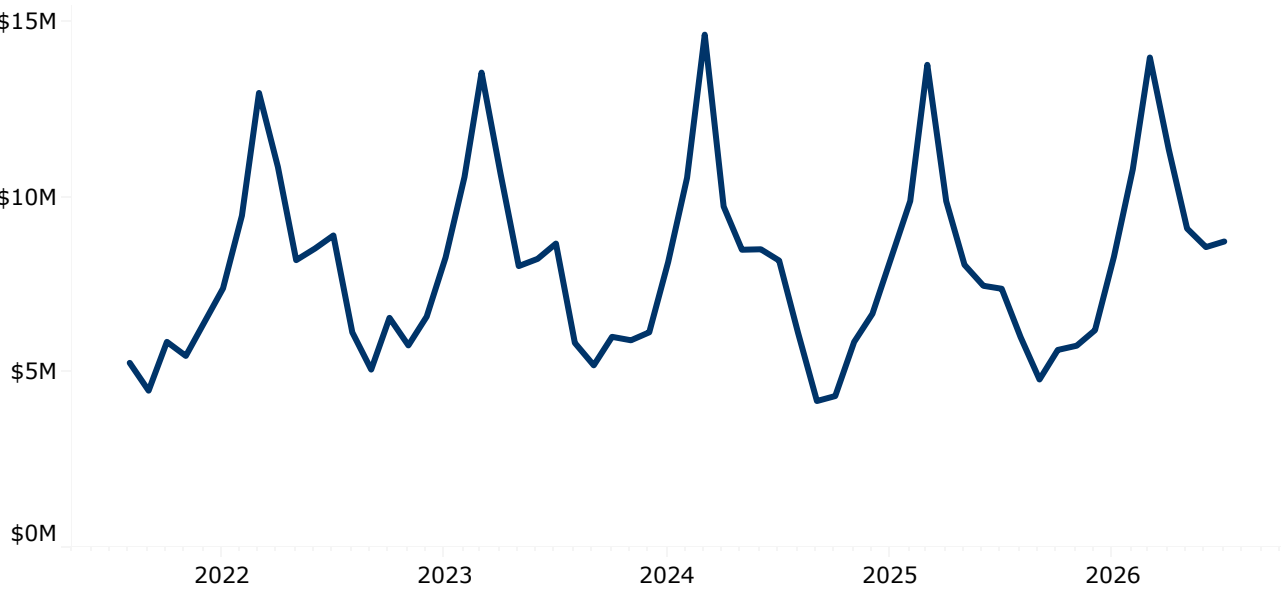
Tourist Development Tax Collections

July 2026 vs. comparable months over the past 5 years



Tourist Development Tax Collections

Long Term Trend





Pinellas County Local Option Tax Collections

July 2026



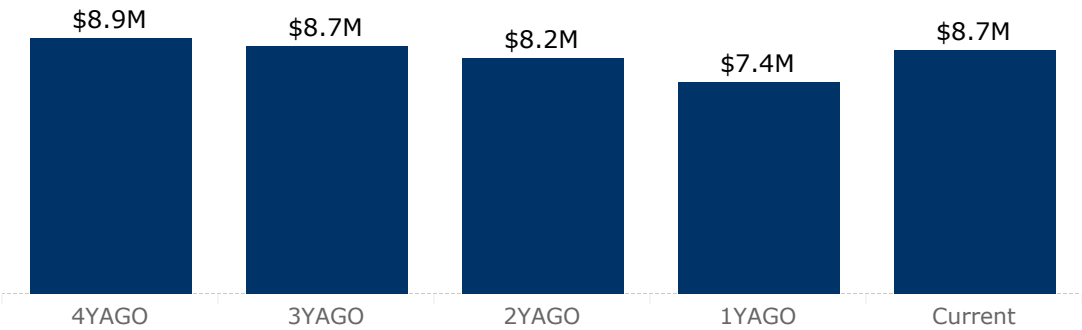
Local Option Tax Share of Total Collections

	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%	39.80%	37.28%		
Clearwater/Clearwater Beach	29.11%	28.06%	26.72%	22.04%	25.80%	28.99%	30.54%	29.90%	27.64%	29.53%		
St Pete Beach/Tierra Verde	9.45%	9.33%	8.52%	6.57%	8.78%	10.82%	11.58%	11.09%	11.21%	12.05%		
St Petersburg	13.70%	15.71%	14.73%	13.06%	13.82%	11.79%	11.94%	11.28%	9.91%	9.66%		
Treasure Island	3.01%	2.87%	2.67%	2.25%	3.16%	3.57%	3.39%	3.31%	3.49%	3.59%		
Madeira Beach	1.46%	1.29%	1.22%	1.08%	1.43%	1.62%	1.34%	1.36%	1.49%	1.44%		
N Redington Beach/Redington Shores	0.95%	0.96%	0.93%	0.92%	1.02%	1.27%	1.18%	1.18%	1.23%	1.25%		
Oldsmar/Safety Harbor	1.69%	1.79%	1.78%	1.62%	1.60%	1.58%	1.38%	1.27%	1.07%	1.16%		
Indian Shores	0.30%	0.28%	0.42%	0.38%	0.49%	0.69%	0.38%	0.35%	0.64%	1.11%		
Dunedin	1.63%	1.53%	1.54%	1.38%	1.44%	1.46%	1.19%	1.19%	1.14%	0.94%		
Indian Rocks Beach	0.62%	0.63%	0.70%	0.59%	0.80%	1.20%	0.88%	0.72%	1.01%	0.87%		
Palm Harbor	1.38%	1.37%	1.33%	1.48%	1.39%	1.00%	1.00%	0.97%	0.72%	0.53%		
Tarpon Springs	0.45%	0.44%	0.48%	0.43%	0.43%	0.44%	0.36%	0.37%	0.34%	0.32%		
Belleair/Belleair Beach/Bluffs/Shores	0.21%	0.25%	0.27%	0.24%	0.30%	0.26%	0.28%	0.30%	0.31%	0.25%		
Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%		

Source: Pinellas County Tax Collector

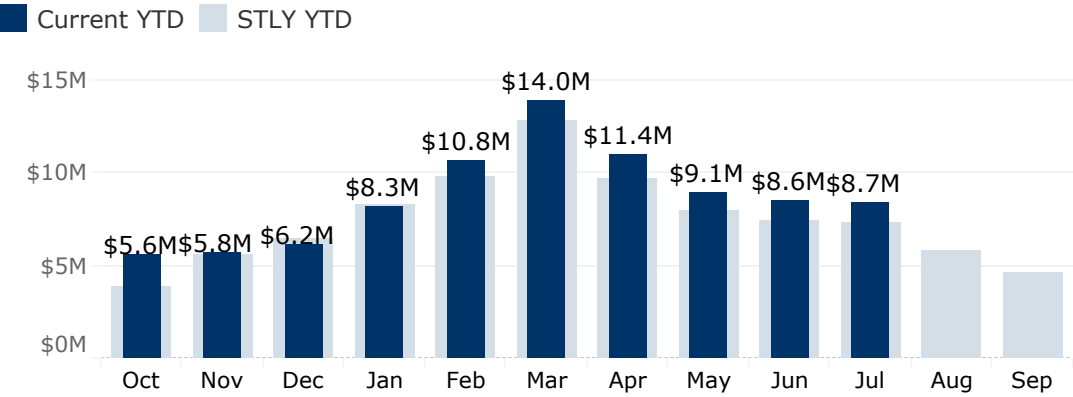
Tourist Development Tax Collections

July 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

