

BEACH.
CULTURE.

Destination Metrics

September TDT

AWAITING DATA

Fills in from the Tax Collector's Official Comparative Report 2025–2026 once September gross collections are posted.

- FY24 September comes from Raw Data Table 54.
- Speaker note to keep: Hurricane Helene (Sept 26, 2024) held down September FY24, so the vs FY24 change will look strong.

Source: Pinellas County Tax Collector (gross collections)

September TDT by City

AWAITING DATA

Fills in from the Sep 2026 Local Option CVB Report (by city), with Sep 2025 and Sep 2024 from Raw Data Table 55.

- For comparing cities only. Totals on other slides use gross TDT.
- Table 55 must include Sep 2024 and Sep 2025.

Source: Pinellas County Tax Collector, Local Option CVB Report

September Visitor & Industry Metrics

TOTAL VISITORS

2.2M

+12.8% vs FY25

vs FY24: exact count needed

HOTEL OCCUPANCY

57.2%

+4.7% vs FY25

+0.2% vs FY24

HOTEL ADR

$156.08

+6.6% vs FY25

+8.7% vs FY24

VACATION RENTAL OCCUPANCY

33.5%

+19.6% vs FY25

+15.1% vs FY24

VACATION RENTAL ADR

$264.58

+3.2% vs FY25

+8.2% vs FY24

SEPTEMBER TDT

Pending

Tax Collector report needed

Sources: Placer (visitors) · CoStar (hotels, Pinellas County) · Key Data (Airbnb vacation rentals, Pinellas) · Tax Collector (TDT). September of each year; visitors rounded to 0.1M (Placer Market Overview).

What Moved September Occupancy

Occupancy rose because demand grew much faster than supply, for hotels and vacation rentals alike. All figures are September 2026 vs. September 2025.

Hotels

Rooms available (supply)	**+2.8%**
Rooms sold (demand)	**+7.7%**
Occupancy	**+4.7%**
ADR	**+6.6%**
Room revenue	**+14.7%**

Rooms sold grew nearly three times as fast as new rooms, lifting both occupancy and rate.

Vacation Rentals

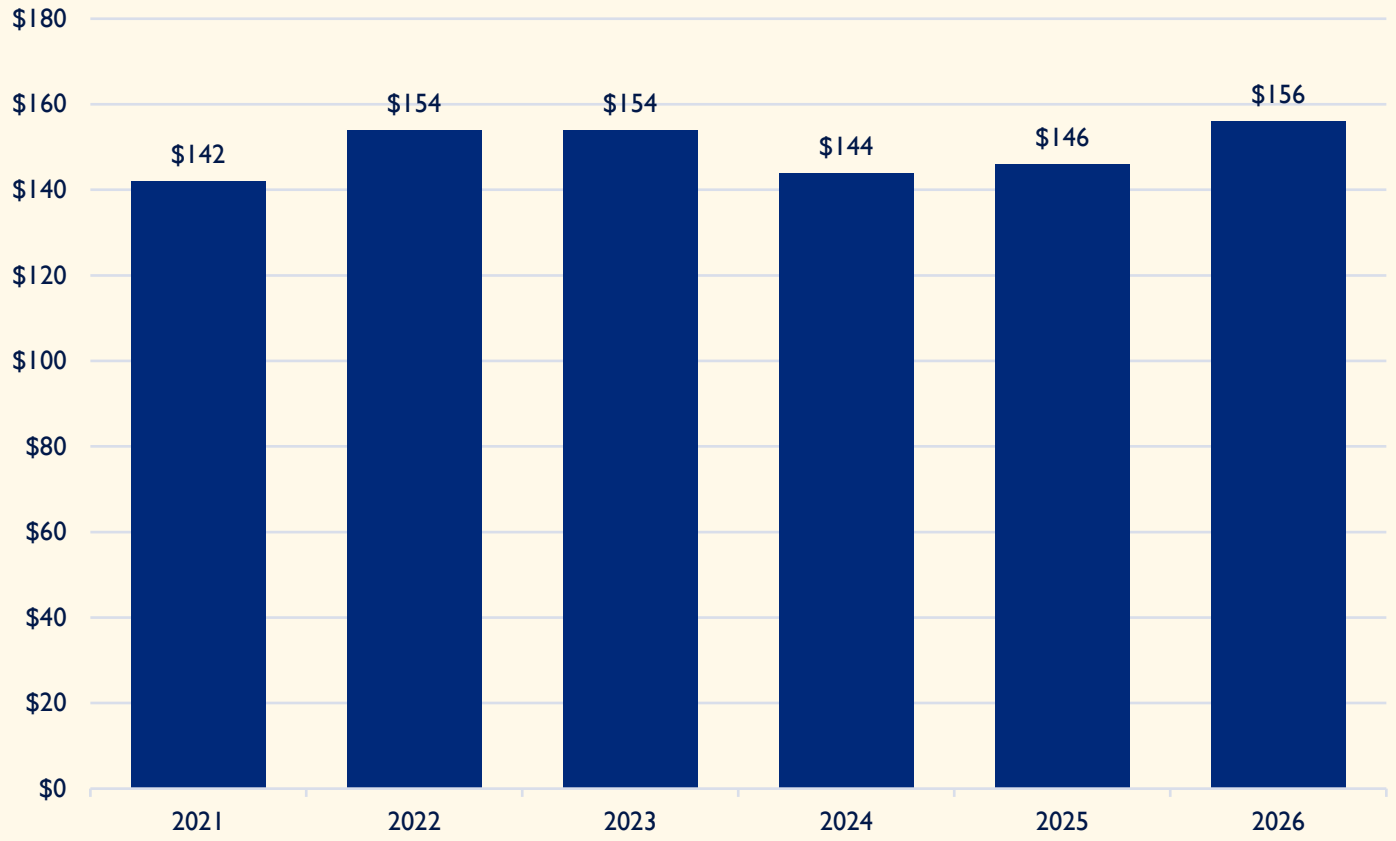
Active listings	**+3.4%**
Nights booked (demand)	**+23.7%**
Occupancy	**+19.6%**
ADR	**+3.2%**
Rental revenue	**+27.7%**

Nights booked grew seven times faster than listings; rental revenue rose more than a quarter.

Sources: CoStar (Pinellas County hotels) · Key Data (Airbnb, Pinellas)

September Hotel Rate

September closed the fiscal year with the highest September hotel rate since at least 2021, and occupancy up 4.7%.



SEPTEMBER OCCUPANCY

57.2%

+4.7% vs Sep 2025

SEPTEMBER RevPAR

$89.34

+11.6% vs Sep 2025

BEACH HOTEL RevPAR

$115.54

+12.9% vs Sep 2025

Source: STR monthly hotel reports for VSPC, Pinellas County, September 2021–2026. ADR = room revenue ÷ rooms sold; RevPAR = room revenue ÷ rooms available.

FY26 Full Year TDT

AWAITING DATA

Fills in from the Official Comparative Report once September is posted. This slide becomes the FY26 full-year total (Oct 2025–Sep 2026).

- Reported so far: FY26 $94,701,539 through August (gross, Tax Collector).
- Full-year comparisons: FY25 $92,530,687 · FY24 $96,758,114 (gross).

Source: Pinellas County Tax Collector (gross collections)

FY26 Full Year Metrics (Oct–Sep)

TOTAL VISITORS

16.1M

+9.7% vs FY25

-3.4% vs FY24*

HOTEL OCCUPANCY

67.6%

-6.4% vs FY25

+0.3% vs FY24

HOTEL ADR

$194.13

-0.2% vs FY25

+2.0% vs FY24

VACATION RENTAL OCCUPANCY

45.3%

+1.8% vs FY25

+9.3% vs FY24

VACATION RENTAL ADR

$332.22

+9.7% vs FY25

+24.4% vs FY24

TOTAL TDT FY26

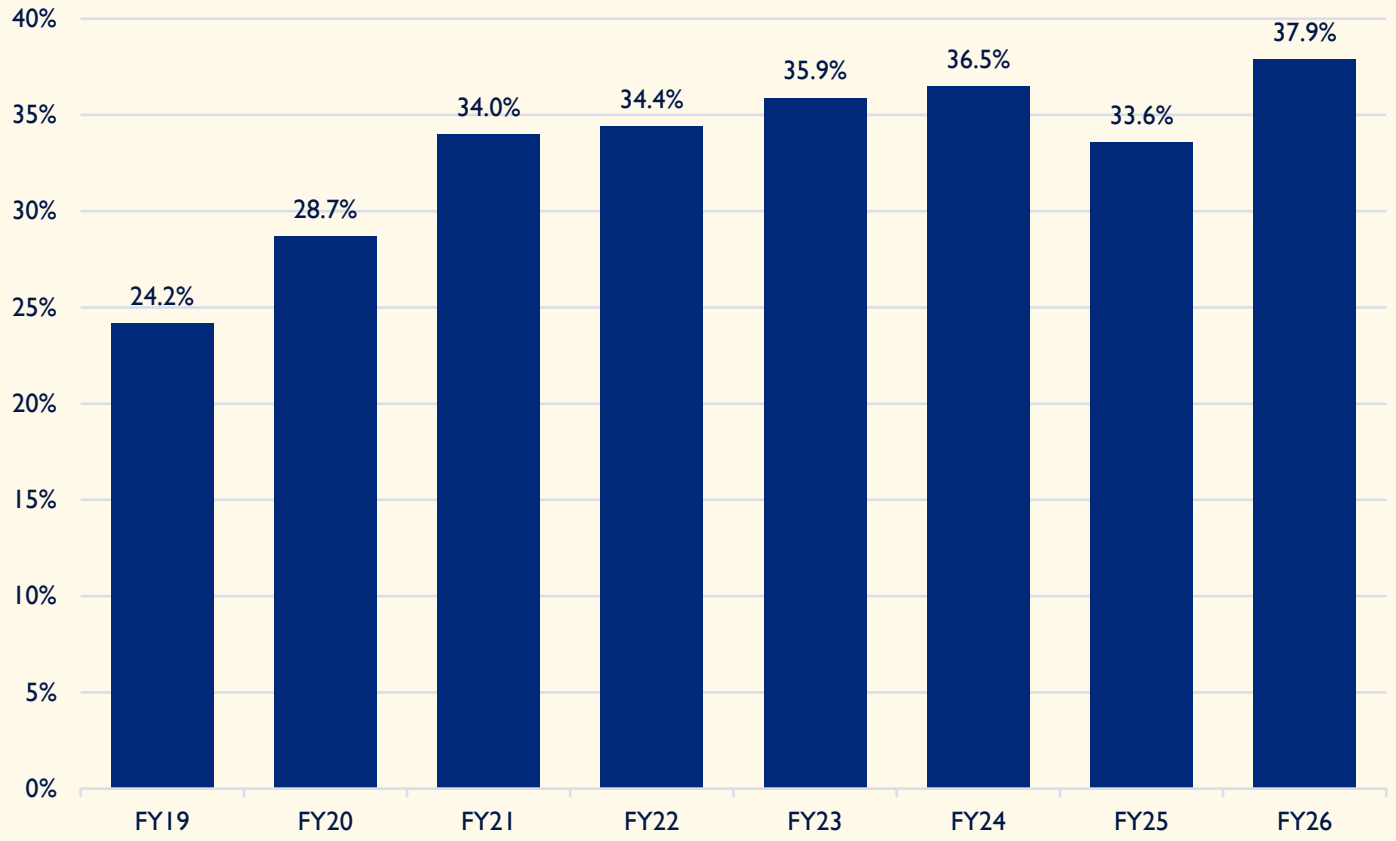
Pending

Tax Collector report needed

Oct–Sep of each fiscal year; occupancy and ADR weighted by monthly supply, demand and revenue. *Placer Market Overview (rounded to 0.1M); vs FY24 from Placer's YoY rates. Sources: Placer · CoStar · Key Data (Airbnb) · Tax Collector

What Drove FY26 TDT Growth

Vacation rentals supplied $6.7M of the $7.8M increase in TDT, and now pay about 38 cents of every TDT dollar.



TOTAL TDT GROWTH

+$7.8M

+9.2% vs FY25 (Oct–Aug)

FROM VACATION RENTAL/OTHER

+$6.7M

+23.3% vs FY25 · 85% of growth

ALL CITY-ASSIGNED TDT

+2.0%

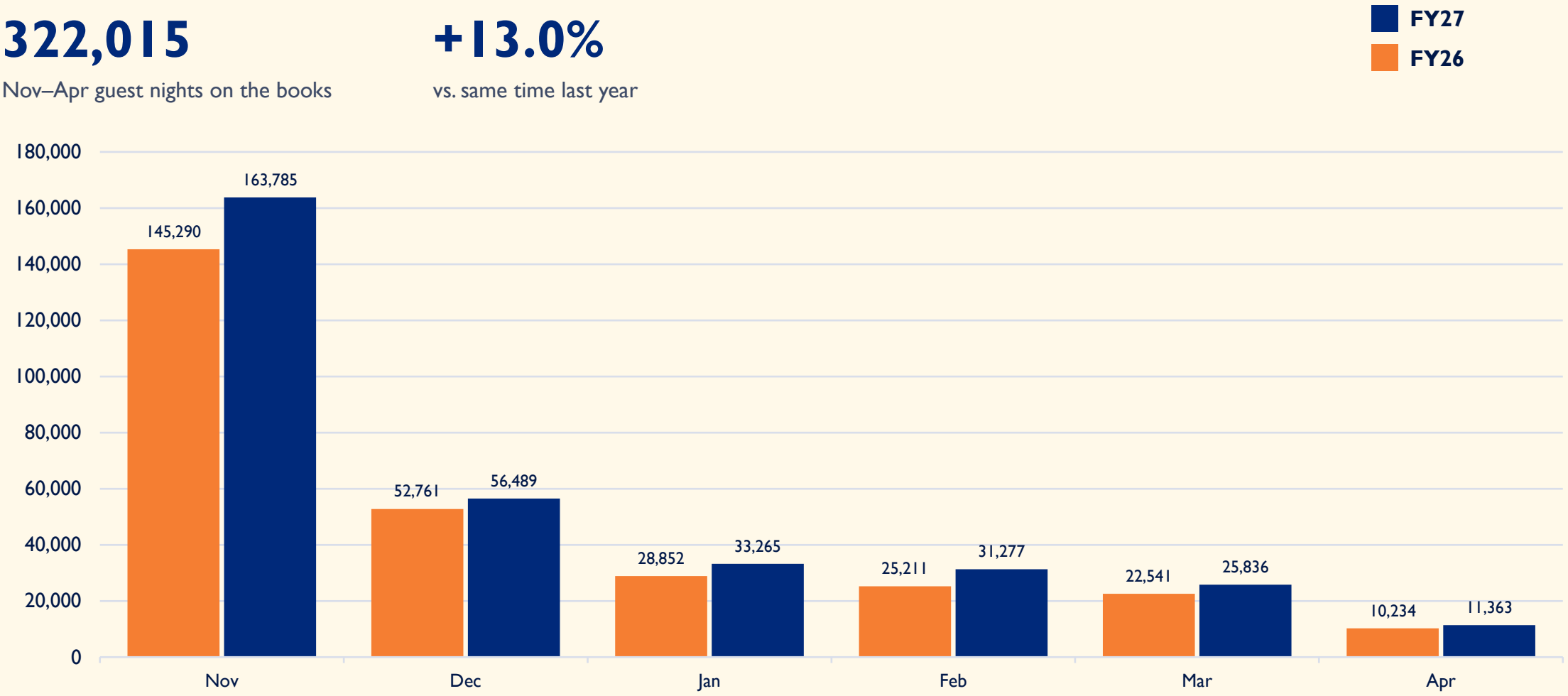
$57.8M vs $56.7M (Oct–Aug)

Source: Pinellas County Tax Collector, local option TDT by area (payments for each month), October–August of each fiscal year. Vacation Rental/Other = "Miscellaneous/Other," mostly Airbnb and Vrbo payments. September FY26 not yet reported.

Hotel Pacing – Guest Nights

322,015
Nov–Apr guest nights on the books

+13.0%
vs. same time last year



Source: Key Data – Amadeus, Pinellas hotels. Guest nights on the books, Nov 1, 2026–Apr 30, 2027, by week of arrival grouped into the month each week begins; last year aligned to the same week and day of week. Data as of Nov 4, 2026 and Nov 2, 2025.

Vacation Rental Pacing

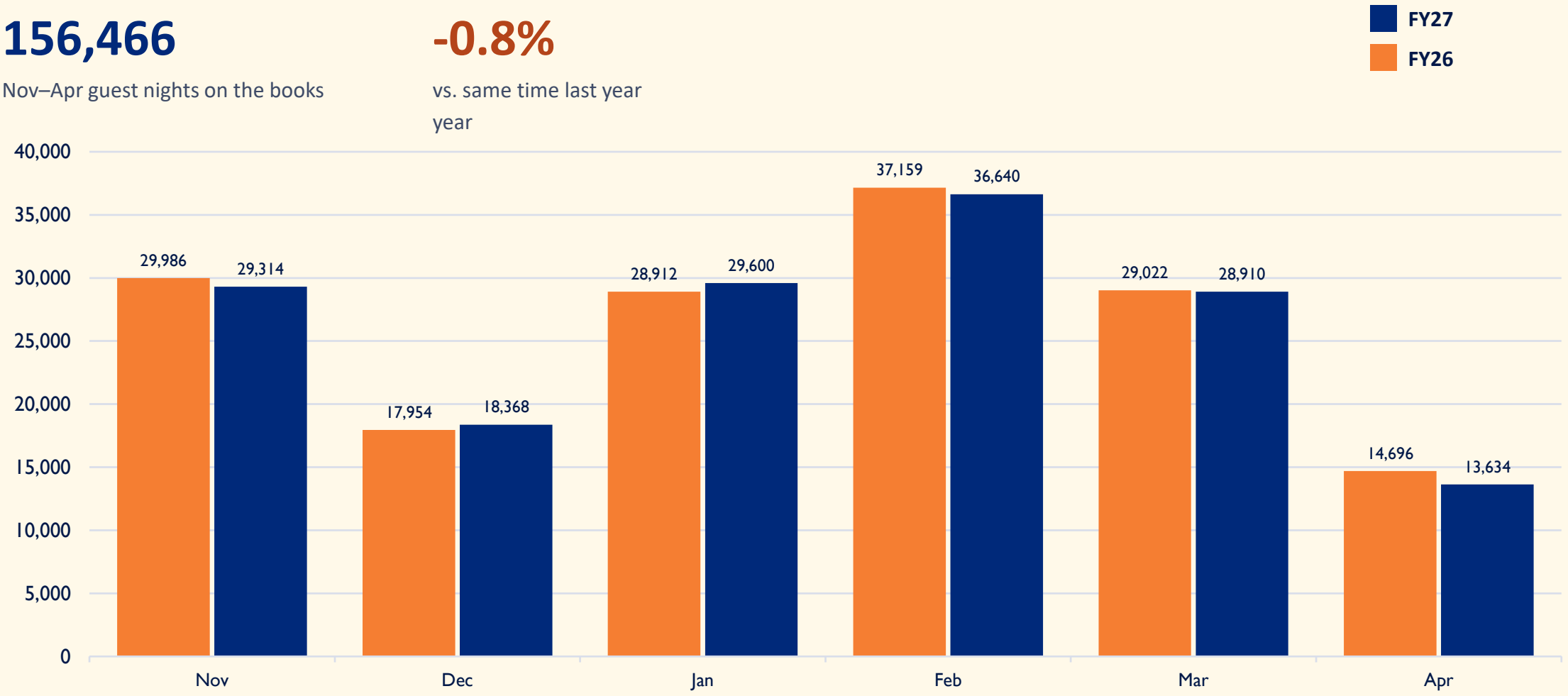
156,466

Nov–Apr guest nights on the books

-0.8%

vs. same time last year

year



Source: Key Data – Direct Vacation Rental Sample, Pinellas. Guest nights on the books as of Nov 10 of each year, by week of arrival grouped into the month each week begins; last year aligned to the same day of week. Sample: 3,112 properties (2026), 4,576 (2025).

ST. PETE CLEARWATER