Visit St. Pete/Clearwater
VISITOR PROFILE STUDY
Dashboard of Findings

Research prepared for Visit St. Pete/Clearwater by:
Destination Analysts

Pinellas County – November 2021
Overview & Methodology

This online report presents interim findings of a comprehensive visitor profile development study conducted by Destination Analysts, Inc. on behalf of Visit St. Pete/Clearwater. The data presented here comes from an in-person intercept survey of St. Pete/Clearwater area visitors at locations throughout the destination. To be considered a visitor respondents had to reside outside of Pinellas County. This online report presents the top-line survey data collected from October 2017 onward and collection is still ongoing.

Data presented within this report is weighted to accurately reflect the overall population of St. Pete/Clearwater area visitors. The total number of completed surveys from Pinellas County visitors collected is 400 for November 2021.
Overview & Methodology

Destination Analysts’ survey team worked at locations around the St. Pete/Clearwater area as well as at the Tampa International Airport to randomly select and interview visitors. The questionnaire was administered to persons residing outside Pinellas County at the following locations and events:

- Chihuly Collection
- Clearwater Beach
- Clearwater Marine Aquarium
- Dunedin
- Hyatt Place
- John’s Pass Village & Boardwalk
- Museum of Fine Arts
- Pier 60
- Salvador Dali Museum
- Sandpearl Resort
- Shephard’s Beach Resort
- St. Pete-Clearwater International Airport
- St. Pete Pier
- Sunken Gardens
- Tampa International Airport
- TradeWinds Island Grand
- The James Museum
- Wyndham Grand Clearwater Beach
The overarching goal of this survey-based research is to create in-depth profiles of Pinellas County visitors, including:

- Detailed trip characteristics (i.e. the reason for visiting the area, length of stay, place of stay, etc.)
- Travel party composition
- Activities & attractions visited in the St. Pete/Clearwater area
- Evaluation of St. Pete/Clearwater brand attributes
- Detailed visitor spending estimates
- Travel planning resources used by St. Pete/Clearwater area visitors
- Visitor satisfaction
- Visitor demographics
KEY THINGS TO KNOW
VISIT ST. PETE/CLEARWATER November 2021

Average Time Between Decision to Visit & Arrival

- Nov-19: 61.8
- Nov-20: 39.5
- Nov-21: 44.6

Average Daily Spending

- Nov-21: $277.48
- Nov-20: $233.70
- Nov-19: $221.62

Travel Party Size

- Nov-21: 2.5

Average Days & Nights

- Days: Nov-19 - 2.6, Nov-20 - 2.6, Nov-21 - 3.3
- Nights: Nov-19 - 1.6, Nov-20 - 2.6, Nov-21 - 2.8

Generations

- Millennial or younger: 41.4%
- Gen X: 37.9%
- Boomer or older: 41.1%

Average Age

- Nov-19: 47.9
- Nov-20: 49.2
- Nov-21: 48.0

Percent Staying Overnight

- Nov-19: 44.4%
- Nov-20: 30.5%
- Nov-21: 36.7%

Average Income

- Nov-21: $109,661
- Nov-20: $101,261
- Nov-19: $96,196
Key Things to Know - November 2021

The following is a summary of the most significant changes seen in the visitor profile in the month of November 2021:

- While vacation remained the top primary reason for visiting the St. Pete/Clearwater area in November, visiting friends or family in the area outperformed prior years in November 2021.
  - In November 2021, 31.2 percent of visitors said visiting friends or family in the area was their primary reason for visiting – the highest percentage since 2017.
    - Nov 21 = 31.2%
    - Nov 20 = 18.3%
    - Nov 19 = 22.4%
    - Nov 18 = 20.1%
    - Nov 17 = 33.9%
  - Similarly, the percentage of travelers who selected "friends or family in the area" as being important to their decision to take a trip to St. Pete/Clearwater reached a 2021 high in November of 39.4% compared to 17.6% in October.

- Spending per day in November was on par with the month prior but there were notable shifts by category this month.
  - Compared to October 2021, spending per day on hotel/motel/lodging decreased by 22% ($77 vs $98, respectfully), most likely due to the increase in VFR stays.
  - Spending on restaurants also decreased, from $102 per day in October to $89 in November.
  - The largest monthly increase in November was in retail store purchases, which increased 93% month over month.
  - Retail spending jumped from $39 in October to $75 spent per day in November, the highest recorded monthly retail spend this year so far.

- Another 2021 record high is the percentage of travelers who have visited the area more than 20 times.
  - In November 29.3% of respondents said that they have visited the St. Pete/Clearwater area more than 20 times previously, much higher than the Jan-Oct 2021 average of 15.6%.

Destination Analysts
### Point of Origin

#### Country of Origin
- **United States**: 96%
- **Canada**: 2%
- **United Kingdom**: 1%
- **Germany**: 0%
- **France**: 0%
- **Mexico**: 0%
- **China**: 0%
- **Other**: 2%

#### State of Origin
- **Florida**: 47%
- **Ohio**: 6%
- **New York**: 4%
- **Illinois**: 4%
- **New Jersey**: 4%
- **Georgia**: 3%
- **Indiana**: 2%
- **Virginia**: 2%
- **North Carolina**: 2%
- **Minnesota**: 2%
- **Pennsylvania**: 2%
- **Wisconsin**: 2%

#### MSA of Origin
- **Tampa, FL**: 27%
- **Orlando, FL**: 5%
- **Sarasota-Bradenton, FL**: 5%
- **Chicago, IL**: 3%
- **Newark, NJ**: 3%
- **Lakeland-Winter Haven, FL**: 3%
- **New York, NY-NJ**: 3%
- **Washington, DC-MD-VA**: 2%
- **Indianapolis, IN**: 2%
- **Denver-Boulder, CO**: 2%
- **Jacksonville, FL**: 2%
- **Milwaukee, WI**: 2%

**Base:** 2021 - November 400 responses.
Lodging Type / Daily Spending in Market

### Lodging Type

- **Hotel, resort or motel in SPC**: 18%
- **Home share rental in the SPC**: 4%
- **Condo/vacation home in the SPC**: 8%
- **Private residence in SPC**: 6%
- **Day trip**: 63%

### Daily Spending

- **Restaurants**: $89
- **Hotel/motel/inn/lodging**: $77
- **Retail store purchases**: $75
- **Other Entertainment & sightseeing**: $16
- **Gas, parking and local transportation**: $11
- **Car rental (in area only)**: $10
- **Other**: $0

- **Mean Travel Party Spending = $277**
- **Avg # of People Covered by Spending = 2**
- **Mean Spending Per Person = $120**

Base: 2021 - November 400 responses.
Days & Nights in St. Pete/Clearwater

Days in Market

- Mean Days
  - (≤ 30) = 3
  - (> 30) = 4

Nights in Market

- Mean Nights
  - (≤ 30) = 3
  - (> 30) = 4

Base: 2021 - November 400 responses.
Primary Reason for Visit / Other Destinations Visited

**Primary Reason for Visit**

- Vacation: 42%
- Visit friends or family in the area: 31%
- Other personal reasons: 14%
- Weekend getaway: 5%
- Business: 2%
- Wedding: 2%
- Attend special event, exhibition or concert: 1%
- On or pre/post a cruise: 1%
- Honeymoon: 1%
- Conference/tradeshow or other group meeting: 0%
- Attend sports event/tournament: 0%
- Government business/travel: 0%

**Other Destinations Visited on SPC Trip**

- Tampa: 26%
- Orlando/Disney: 7%
- Sarasota Area: 7%
- Lakeland/Winter Haven: 2%
- Crystal River: 1%
- Miami: 1%
- Ocala/Gainesville: 1%
- Panhandle: 1%
- Jax/St. Augustine: 1%
- Ft. Lauderdale/Palm Beach: 0%
- Ft. Myers/SW Florida: 0%
- Tallahassee: 0%
- Kennedy/Space…: 0%
- Florida Keys: 0%
- Daytona: 0%
- Sebring: 0%
- Everglades: 0%
- NONE—The St.: 54%

Base: 2021 - November 400 responses.
Method of Arrival / Arrival Airport & Airline

Method of Arrival

- Personal vehicle: 63%
- Airline: 38%
- Rental vehicle: 4%
- Tour bus: 2%
- Rideshare (Uber, Lyft, etc.): 1%
- Taxi or limo: 0%
- Train: 0%
- RV: 0%
- Public bus: 0%
- Other: 1%

Method of Departure

- Personal vehicle: 63%
- Airline: 28%
- Rental vehicle: 4%
- Tour bus: 2%
- Rideshare (Uber, Lyft, etc.): 1%
- Taxi or limo: 0%
- Train: 0%
- RV: 0%
- Public bus: 0%
- Other: 1%

Base: 2021 - November 400 responses.
Method of Arrival / Arrival Airport & Airline

Airport of Arrival

- Tampa Int'l.: 65%
- St. Pete-Clearwater Int'l: 18%
- Orlando Int'l: 12%
- Sarasota/Bradenton Int'l: 4%
- Miami Int'l: 1%
- SW FL Int'l. (Ft. Myers): 0%
- Ft. Lauderdale Int'l: 0%
- Palm Beach Int'l: 0%
- Sanford Int'l: 0%
- Jacksonville Int'l: 0%
- Other: 0%

Airline Used by Airport of Arrival

- Tampa Int'l:
  - Southwest: 25.7%
  - Allegiant: 4.0%
  - Delta Airlines: 11.8%
  - American Airlines: 11.2%
  - United: 10.8%
  - Jet Blue: 9.9%
  - Alaska Airlines: 1.1%
  - Sun Country: 0.0%
  - Other: 25.4%

- St. Pete-Clearwater Int'l:
  - Southwest: 18.5%
  - Allegiant: 2.9%
  - Delta Airlines: 2.9%
  - American Airlines: 2.9%
  - United: 2.9%
  - Jet Blue: 2.9%
  - Alaska Airlines: 2.9%
  - Sun Country: 2.9%
  - Other: 2.9%

Base: 2021 - November 400 responses.
Rental Vehicle Pick-Up City / Transportation Used In-Market

**Rental Vehicle Pick-Up City**
- Tampa: 69%
- Orlando: 18%
- St. Petersburg/Clearwater area: 10%
- Sarasota/Bradenton: 2%
- Miami: 1%
- Outside of Florida: 0%
- Ft. Myers: 0%
- Fort Lauderdale: 0%
- West Palm Beach: 0%
- Jacksonville: 0%
- Sanford: 0%

**Transportation Used In-Market**
- Personal vehicle: 73%
- Rental vehicle: 21%
- Uber, Lyft, etc.: 4%
- Tour bus: 1%
- Boat: 0%
- Free Beach Rides: 0%
- Public bus: 0%
- Taxi or limo: 0%
- Bicycle: 0%
- Motorcycle: 0%
- RV: 0%

Base: 2021 - November 400 responses.
Travel Party Composition / Travel Party Size

Travel Party Composition

- Solo: 18%
- Couple: 46%
- Immediate Family: 27%
- Extended Family: 1%
- Group of Couples: 2%
- Group of Friends: 11%
- Tour Group: 0%
- Business Associates: 1%
- Other: 0%

Travel Party Size

- Female adults (18 yrs. +): 1
- Male adults (18 yrs. +): 1
- Male children (0 to 17 yrs.): 0
- Female children (0 to 17 yrs.): 0

Avg Travel Party Size = 2
Percent with Children = 14%

Base: 2021 - November 400 responses.
**Important Factors to Destination Decision / Trip Activities**

<table>
<thead>
<tr>
<th>Important to Decision to Visit</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weather</td>
<td>45%</td>
</tr>
<tr>
<td>Friends or family in the area</td>
<td>39%</td>
</tr>
<tr>
<td>Beaches that suit my tastes</td>
<td>36%</td>
</tr>
<tr>
<td>Restaurants, cuisine, food scene</td>
<td>31%</td>
</tr>
<tr>
<td>Shopping opportunities</td>
<td>30%</td>
</tr>
<tr>
<td>Attractions in the area</td>
<td>25%</td>
</tr>
<tr>
<td>Scenic beauty</td>
<td>24%</td>
</tr>
<tr>
<td>Arts &amp; cultural offerings</td>
<td>19%</td>
</tr>
<tr>
<td>Recommendation from people I…</td>
<td>19%</td>
</tr>
<tr>
<td>Overall ambiance &amp; atmosphere</td>
<td>18%</td>
</tr>
<tr>
<td>Easy to get to</td>
<td>18%</td>
</tr>
<tr>
<td>The SPC area is romantic</td>
<td>16%</td>
</tr>
<tr>
<td>Advertisements for the area</td>
<td>12%</td>
</tr>
<tr>
<td>Articles, features, reviews</td>
<td>12%</td>
</tr>
<tr>
<td>St. Pete Pier</td>
<td>10%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Trip Activities</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dining in restaurants</td>
<td>78%</td>
</tr>
<tr>
<td>Visit the beach</td>
<td>70%</td>
</tr>
<tr>
<td>Shopping</td>
<td>63%</td>
</tr>
<tr>
<td>Visit friends or family</td>
<td>40%</td>
</tr>
<tr>
<td>Visit museums</td>
<td>32%</td>
</tr>
<tr>
<td>Bars/Nightlife</td>
<td>30%</td>
</tr>
<tr>
<td>Swimming</td>
<td>18%</td>
</tr>
<tr>
<td>Guided tour</td>
<td>14%</td>
</tr>
<tr>
<td>Photography</td>
<td>11%</td>
</tr>
<tr>
<td>Bird watching</td>
<td>11%</td>
</tr>
<tr>
<td>Other boating</td>
<td>11%</td>
</tr>
<tr>
<td>Jet skiing</td>
<td>7%</td>
</tr>
<tr>
<td>Fishing</td>
<td>6%</td>
</tr>
<tr>
<td>Take a dining cruise</td>
<td>5%</td>
</tr>
<tr>
<td>Attend a festival or special event</td>
<td>5%</td>
</tr>
</tbody>
</table>

*Base: 2021 - November 400 responses.*
First-Time Visit to Florida / Previous Visitation to St. Pete/Clearwater

First Time Visitors to Florida

- Yes: 5%
- No: 95%

Previous Visitation to the St. Pete/Clearwater Area

- First Time Visitor: 18%
- 1 - 10 Previous Visits: 42%
- 11 - 20 Previous Visits: 11%
- More than 20 Visits: 29%

Mean # of Past Trips = 12

Base: 2021 - November 400 responses.
# Attractions Visited / Communities Visited

<table>
<thead>
<tr>
<th>Attractions Visited</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dali Art Museum</td>
<td>25%</td>
</tr>
<tr>
<td>St. Pete Pier</td>
<td>16%</td>
</tr>
<tr>
<td>Chihuly Exhibit</td>
<td>14%</td>
</tr>
<tr>
<td>Busch Gardens</td>
<td>6%</td>
</tr>
<tr>
<td>Clearwater Marine Aquarium</td>
<td>6%</td>
</tr>
<tr>
<td>Adventure Island</td>
<td>4%</td>
</tr>
<tr>
<td>Orlando area Theme Parks</td>
<td>3%</td>
</tr>
<tr>
<td>Tarpon Springs</td>
<td>3%</td>
</tr>
<tr>
<td>Ft. Desoto Park</td>
<td>1%</td>
</tr>
<tr>
<td>Sunken Gardens</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>8%</td>
</tr>
<tr>
<td>NONE OF THESE</td>
<td>45%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Communities Visited</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>St. Petersburg</td>
<td>54%</td>
</tr>
<tr>
<td>Madeira Beach</td>
<td>49%</td>
</tr>
<tr>
<td>Clearwater Beach</td>
<td>44%</td>
</tr>
<tr>
<td>Clearwater</td>
<td>23%</td>
</tr>
<tr>
<td>Treasure Island</td>
<td>19%</td>
</tr>
<tr>
<td>Pinellas Park</td>
<td>18%</td>
</tr>
<tr>
<td>St. Pete Beach</td>
<td>16%</td>
</tr>
<tr>
<td>Indian Shores &amp; Indian Rocks Beach</td>
<td>13%</td>
</tr>
<tr>
<td>Largo</td>
<td>5%</td>
</tr>
<tr>
<td>Tarpon Springs</td>
<td>4%</td>
</tr>
<tr>
<td>Dunedin</td>
<td>4%</td>
</tr>
<tr>
<td>North Redington Beach/Redington...</td>
<td>2%</td>
</tr>
<tr>
<td>Gulfport</td>
<td>1%</td>
</tr>
<tr>
<td>Seminole</td>
<td>1%</td>
</tr>
<tr>
<td>Tierra Verde</td>
<td>1%</td>
</tr>
</tbody>
</table>

Base: 2021 - November 400 responses.
Most Liked Aspects of SPC (Unaided)

- Beaches / Ocean: 60%
- Tropical Climate / Warm Weather: 37%
- Relaxing Atmosphere / Ambiance: 29%
- Food / Restaurants & Bars: 29%
- Scenic Beauty: 29%
- Friendly People: 28%
- Shopping: 27%
- Everything: 27%
- Clean: 24%
- Entertainment / Variety of Fun…: 24%
- Accessible / Convenient / Walkable: 22%
- Safe: 19%
- Great Location / Easy to get to: 17%
- Attractions (Museums, Aquarium,…): 16%
- Family Friendly: 7%

Feelings in SPC Area (Unaided)

- Calm / Relaxed: 54%
- Happy: 46%
- Energized / Excited: 26%
- Comfortable: 20%
- Welcomed: 20%
- Entertained: 18%
- Amazing: 17%
- Safe: 15%
- Refreshed / Healthy: 9%
- Fine / Good: 5%

Base: 2021 - November 400 responses.
## Attractions or Services that Would Enhance the Destination Experience

### Additional Attractions or Services (Unaided)

<table>
<thead>
<tr>
<th>Service</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>It needs no improvement</td>
<td>83%</td>
</tr>
<tr>
<td>Cheaper &amp; More Parking</td>
<td>9%</td>
</tr>
<tr>
<td>Less congestion / traffic</td>
<td>1%</td>
</tr>
<tr>
<td>More public restrooms</td>
<td>1%</td>
</tr>
<tr>
<td>More Public Transportation Options</td>
<td>1%</td>
</tr>
<tr>
<td>Better Signage /accessibility</td>
<td>1%</td>
</tr>
<tr>
<td>More Affordable</td>
<td>1%</td>
</tr>
<tr>
<td>Restaurant Diversity</td>
<td>0%</td>
</tr>
<tr>
<td>More kid friendly activities</td>
<td>0%</td>
</tr>
<tr>
<td>Clean it up</td>
<td>0%</td>
</tr>
<tr>
<td>Tourist Information</td>
<td>0%</td>
</tr>
<tr>
<td>Finish the Pier</td>
<td>0%</td>
</tr>
<tr>
<td>Bars and food options on the beach</td>
<td>0%</td>
</tr>
<tr>
<td>More shaded / green areas</td>
<td>0%</td>
</tr>
<tr>
<td>More Shopping</td>
<td>0%</td>
</tr>
</tbody>
</table>

Base: 2021 – November 400 responses.
When Decision to Visit was Made / Travel Planning Resources Used

Average Time Between Decision to Visit and Arrival

- 45 Days in Advance

Resources Used before Arrival and While In Market

- Opinions of friends or relatives: 41% (BEFORE ARRIVING) vs. 19% (WHILE IN ST. PETE/CLEARWATER AREA)
- User-generated content/Review websites, such as Yelp and…: 36% vs. 18%
- Social Media content: 33% vs. 22%
- Official St. Petersburg/Clearwater area tourism website,…: 22% vs. 3%
- Online travel agencies (Expedia, Travelocity, etc.): 22% vs. 1%
- Travel guides, brochures: 20% vs. 7%
- Lifestyle or travel magazines: 9% vs. 6%
- Newspaper travel section: 5% vs. 3%
- YouTube or other online videos: 3% vs. 1%
- Gulf to Bay St. Pete/Clearwater Destination Magazine: 2% vs. 1%
- Travel agency (traditional, offline): 2% vs. 1%
- Radio programming: 0% vs. 2%
- Television programming: 0% vs. 2%

Base: 2021 - November 400 responses.
Experience Satisfaction / Earned & Paid Media Recall

**Overall Satisfaction**

- **Very satisfied**: 96%
- **Satisfied**: 4%
- **Neutral—neither satisfied nor unsatisfied**: 0%
- **Unsatisfied**: 0%
- **Very unsatisfied**: 0%

**Media Recall**

- **Yes**: 36%
- **No**: 59%
- **Maybe/Not sure**: 5%

Base: 2021 - November 400 responses.
Likelihood to Recommend / Likelihood to Return

Likelihood to Recommend: 9.9 / 10

Likelihood to Return: 9.9 / 10

Base: 2021 - November 400 responses.
Demographics

**Gender:**
- Female: 63%
- Male: 37%
- Other: 0%
- I prefer not to answer: 8%

**Race/Ethnicity:**
- Caucasian: 83%
- Latino/Hispanic: 5%
- Black/African-American: 5%
- Asian/Pacific Islander: 2%
- American Indian/Alaska Native: 2%
- Other: 2%
- I prefer not to answer: 1%

**Marital Status:**
- Single: 29%
- Single with children under 18: 1%
- Married/partnered: 52%
- Married/partnered with children under 18: 14%
- Other: 4%
- I prefer not to answer: 1%

**Sexual Orientation:**
- Heterosexual: 70%
- LGBTQ: 5%
- Other: 20%
- I prefer not to answer: 5%

Average Age: 49.2
Average Income: $109,660

Base: 2021 - November 400 responses.
Visit St. Pete Clearwater
Visitor Profile Study
Infographic Profile: 2021 - November 400 responses.
Infographic Profile: 2021 - November 400 responses.

- 16.8% Millennials
- 41.0% Gen X
- 27.4% Baby Boomers

Domestic vs. International

- United States Resident: 96%
- International Visitor: 4%

Point of Origin: Top States

- Florida: 47%
- Ohio: 6%
- New York: 4%

Factors Important to Destination Decision

- Weather: 45%
- Friends or family in the area: 39%
- Beaches that suit my tastes: 36%
- Restaurants, cuisine, food scene: 31%
- Shopping opportunities: 30%
- Attractions in the area: 25%
Infographic Profile: 2021 - November 400 responses.

Length of Stay
3.3 Days (on average)

Seasonality of Visit
- Jan-Mar: 0%
- Apr-Jun: 0%
- Jul-Sept: 0%
- Oct-Dec: 100%

Travel Party Size
- 2.5 People
- 14.0% Traveled with Children

Daily Spending
- $120.41 Per Person

Top Communities Visited
- St. Petersburg: 54%
- Madeira Beach: 50%
- Clearwater Beach: 46%
- Clearwater: 24%
- Treasure Island: 21%

Top Activities
- Dining in restaurants: 78%
- Visit the beach: 70%
- Shopping: 63%
- Visit friends or family: 40%