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 for March 2022 was 401 surveys.
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
Research Objectives

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  March 2022

**Average Time Between Decision to Visit & Arrival**
- March 2022: 50.0
- March 2021: 65.4
- March 2020: 71.0

**Travel Party Size**
- March 2022: 2.1
- March 2021: 2.7
- March 2020: 2.6

**Average Days & Nights**
- Days
  - March 2022: 2.9
  - March 2021: 3.5
  - March 2020: 3.3
- Nights
  - March 2022: 2.6
  - March 2021: 2.8
  - March 2020: 3.0

**Generations**
- Millennial or younger: 40.7%
- Gen X: 47.8%
- Boomer or older: 52.7%

**Average Age**
- March 2022: 53.2
- March 2021: 52.1
- March 2020: 52.6

**Average Daily Spending**
- March 2022: $263.51
- March 2021: $301.22
- March 2020: $201.84

**Percent Staying Overnight**
- March 2022: 45.1%
- March 2021: 40.3%
- March 2020: 36.8%

**Average Income**
- March 2022: $105,512
- March 2021: $113,363
- March 2020: $109,722
The following is a summary of the most significant changes seen in the visitor profile in the month of March 2022

- This month, vacation became the top primary reason for visiting the St. Pete/Clearwater area over visiting friends or family in the area.
  - In March 2022, 45.9 percent of visitors said vacation was their primary reason for visiting.

- Due to increased gas prices nationally, the average visitor in March spent $19.76 per day on gas, parking, and local transportation while in the St. Petersburg/Clearwater Area.
  - Reported spending has increased from an average of $19.74 in Q1 2022 compared to the $11.86 in Q4 2021. This is a $7.88 difference, an increase of 66.4%, in 2022 thus far when compared to the end of 2021.

- Visiting the beach jumps to the top activity visitors participated in while visiting the St. Pete/Clearwater area which outperformed dining in restaurants during the month of March.
  - March 2022, 79.3% of visitors reported visiting the beach. This follows the positive trend for March since tracking began.
    - Mar 22 = 79.3%
    - Mar 21 = 74.0%
    - Mar 20 = 61.7%
    - Mar 19 = 63.3%
    - Mar 18 = 55.7%
  - In March 2022, 77.7% of respondents dined in restaurants which decreases from 94.8% in March 2021.

- The Dali Art Museum (10.0%), St. Pete Pier (8.1%) and the Orlando area theme parks (6.1%) were the top attractions respondents visited on their trip while Clearwater Beach (59.7%) and Madeira Beach (35.4%) were the two top communities that respondents visited in March 2022.
Point of Origin

**Country of Origin**
- United States: 94.4%
- Canada: 3.7%
- United Kingdom: 1.4%
- China: 0.1%
- Germany: 0.0%
- France: 0.0%
- Mexico: 0.0%
- Other: 0.4%

**State of Origin**
- Florida: 36.3%
- Michigan: 7.2%
- New York: 6.1%
- Ohio: 5.5%
- Minnesota: 5.0%
- Wisconsin: 4.8%
- Illinois: 2.9%
- Tennessee: 2.5%
- Pennsylvania: 2.3%
- West Virginia: 2.2%
- Texas: 2.2%
- Indiana: 2.0%

**MSA of Origin**
- Tampa, FL: 18.6%
- Sarasota-Bradenton, FL: 12.3%
- Orlando, FL: 4.0%
- Minneapolis-St. Paul, MN-WI: 3.6%
- New York, NY-NJ: 2.8%
- Lakeland-Winter Haven, FL: 2.7%
- Cincinnati, OH-KY-IN: 2.5%
- Detroit, MI: 2.4%
- Chicago, IL: 2.0%
- Milwaukee, WI: 2.0%
- Nassau-Suffolk, NY: 1.8%
- Kalamazoo-Battle Creek, MI: 1.7%

Lodging Type / Daily Spending in Market

<table>
<thead>
<tr>
<th>Lodging Type</th>
<th>Daily Spending</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel, resort or motel in SPC</td>
<td>18.6%</td>
</tr>
<tr>
<td>Home share rental in the SPC</td>
<td>4.3%</td>
</tr>
<tr>
<td>Condo/vacation home in the SPC</td>
<td>8.4%</td>
</tr>
<tr>
<td>Private residence in SPC</td>
<td>5.0%</td>
</tr>
<tr>
<td>Day trip</td>
<td>63.2%</td>
</tr>
</tbody>
</table>

Days & Nights in St. Pete/Clearwater

Days in Market

- Mean Days
  - (≤ 30) = 2.9
  - (> 30) = 6.2

Nights in Market

- Mean Nights
  - (≤ 30) = 2.3
  - (> 30) = 5.2

Primary Reason for Visit / Other Destinations Visited

**Primary Reason for Visit**

- Vacation: 46%
- Visit friends or family in the area: 24%
- Other personal reasons: 16%
- Attend special event, exhibition or concert: 5%
- Weekend getaway: 4%
- Business: 2%
- Conference/tradeshow or other group meeting: 2%
- Wedding: 1%
- Attend sports event/tournament: 1%
- Honeymoon: 0%
- On or pre/post a cruise: 0%
- Government business/travel: 0%

**Other Destinations Visited on SPC Trip**

- Tampa: 19%
- Orlando/Disney: 12%
- Sarasota Area: 7%
- Crystal River: 6%
- Lakeland/Winter Haven: 5%
- Ft. Myers/SW Florida: 4%
- Miami: 2%
- Jax/St. Augustine: 1%
- Ft. Lauderdale/Palm Beach: 1%
- Kennedy/Space…: 1%
- Ocala/Gainesville: 0%
- Sebring: 0%
- Panhandle: 0%
- Daytona: 0%
- Florida Keys: 0%
- Tallahassee: 0%
- Everglades: 0%
- NONE—The St.: 59%

Method of Arrival / Arrival Airport & Airline

Method of Arrival

- Personal vehicle: 63%
- Airline: 39%
- Rental vehicle: 9%
- Rideshare (Uber, Lyft, etc.): 2%
- RV: 1%
- Tour bus: 0%
- Train: 0%
- Public bus: 0%
- Taxi or limo: 0%
- Other: 0%

Method of Departure

- Personal vehicle: 67%
- Airline: 24%
- Rental vehicle: 7%
- Rideshare (Uber, Lyft, etc.): 2%
- RV: 1%
- Tour bus: 0%
- Train: 0%
- Public bus: 0%
- Taxi or limo: 0%
- Other: 0%

### Method of Arrival / Arrival Airport & Airline

#### Airport of Arrival

- **Tampa Int'l.**: 45%
- **St. Pete-Clearwater Int'l**: 39%
- **Orlando Int'l.**: 11%
- **Sarasota/Bradenton Int'l**: 2%
- **Miami Int'l.**: 1%
- **SW Fl Int'l. (Ft. Myers)**: 0%
- **Sanford Int'l**: 0%
- **Ft. Lauderdale Int'l.**: 0%
- **Palm Beach Int'l.**: 0%
- **Jacksonville Int'l.**: 0%
- **Other**: 1%

#### Airline Used by Airport of Arrival

- **Tampa Int'l.**
  - Allegiant: 1.1%
  - Delta Airlines: 25.4%
  - American Airlines: 17.6%
  - Southwest: 15.1%
  - Jet Blue: 11.3%
  - United: 11.0%
  - Sun Country: 4.5%
  - Alaska Airlines: 4.2%
  - Other: 9.8%

- **St. Pete-Clearwater Int'l**
  - Allegiant: 1.3%
  - Delta Airlines: 98.4%
  - American Airlines: 0.0%
  - Southwest: 0.0%
  - Jet Blue: 0.0%
  - United: 0.0%
  - Sun Country: 0.0%
  - Alaska Airlines: 0.0%
  - Other: 0.3%

Rental Vehicle Pick-Up City / Transportation Used In-Market

### Rental Vehicle Pick-Up City
- **Tampa**: 38%
- **St. Petersburg/Clearwater area**: 33%
- **Orlando**: 22%
- **Sarasota/Bradenton**: 3%
- **Miami**: 3%
- **Ft. Myers**: 1%
- **Outside of Florida**: 1%
- **Sanford**: 0%
- **Fort Lauderdale**: 0%
- **West Palm Beach**: 0%
- **Jacksonville**: 0%

### Transportation Used In-Market
- **Personal vehicle**: 75%
- **Rental vehicle**: 19%
- **Uber, Lyft, etc.**: 5%
- **Free Beach Rides**: 2%
- **Public bus**: 1%
- **RV**: 0%
- **Taxi or limo**: 0%
- **Bicycle**: 0%
- **Tour bus**: 0%
- **Motorcycle**: 0%
- **Boat**: 0%

Travel Party Composition / Travel Party Size

**Travel Party Composition**
- Solo: 17%
- Couple: 38%
- Immediate Family: 30%
- Extended Family: 2%
- Group of Couples: 5%
- Group of Friends: 10%
- Tour Group: 0%
- Business Associates: 0%
- Other: 1%

**Travel Party Size**
- Female adults (18 yrs. +): 1
- Male adults (18 yrs. +): 1
- Female children (0 to 17 yrs.): 0.2
- Male children (0 to 17 yrs.): 0.4

**Average Travel Party Size:** 2.1

**Percent with Children:** 19.9%

Important Factors to Destination Decision / Trip Activities

### Important to Decision to Visit

- **Beaches that suit my tastes**: 44%
- **Friends or family in the area**: 33%
- **Weather**: 27%
- **Attractions in the area**: 12%
- **"Restaurants, cuisine, food scene"**: 11%
- **Overall ambiance & atmosphere**: 10%
- **Shopping opportunities**: 10%
- **Outdoor recreational opportunities**: 8%
- **Scenic beauty**: 8%
- **Recommendation from people I...**: 8%
- **Arts & cultural offerings**: 5%
- **Advertisements for the area**: 4%
- **Breweries/Distilleries/Craft beer**: 4%
- **Special event(s) and/or festival(s)**: 4%
- **Sports or sporting events**: 3%

### Trip Activities

- **Visit the beach**: 79%
- **Dining in restaurants**: 78%
- **Shopping**: 55%
- **Photography**: 35%
- **Visit friends or family**: 34%
- **Swimming**: 27%
- **Visit museums**: 10%
- **Bars/Nightlife**: 10%
- **Fishing**: 8%
- **Other boating**: 7%
- **Visit breweries and/or distilleries**: 7%
- **Shelling**: 6%
- **Jet skiing**: 4%
- **Guided tour**: 4%
- **Biking**: 4%

**Base: 2022 - March 401 responses.**
First-Time Visit to Florida / Previous Visitation to St. Pete/Clearwater

First Time Visitors to Florida
- Yes: 4%
- No: 96%

Previous Visitation to the St. Pete/Clearwater Area
- First Time Visitor: 23%
- 1 - 10 Previous Visits: 42%
- 11 - 20 Previous Visits: 16%
- More than 20 Visits: 19%

Mean # of Past Trips = 9.2

Attractions Visited / Communities Visited

**Attractions Visited**
- Dali Art Museum: 10%
- St. Pete Pier: 8%
- Orlando area Theme Parks: 6%
- Tarpon Springs: 5%
- Busch Gardens: 3%
- Clearwater Marine Aquarium: 2%
- Chihuly Exhibit: 2%
- Ft. Desoto Park: 2%
- Sunken Gardens: 1%
- Florida Botanical Gardens: 1%
- Other: 2%
- NONE OF THESE: 69%

**Communities Visited**
- Clearwater Beach: 60%
- Madeira Beach: 35%
- St. Petersburg: 21%
- St. Pete Beach: 21%
- Treasure Island: 20%
- Clearwater: 17%
- Indian Shores & Indian Rocks...: 9%
- Pass-A-Grille Beach: 8%
- Dunedin: 8%
- Pinellas Park: 6%
- North Redington...: 5%
- Tarpon Springs: 5%
- Largo: 5%
- Seminole: 5%
- Tierra Verde: 4%

Most Liked Aspects of SPC (Unaided)

- Beaches / Ocean: 59%
- Tropical Climate / Warm Weather: 26%
- Everything: 25%
- Food / Restaurants & Bars: 19%
- Scenic Beauty: 17%
- Entertainment / Variety of Fun: 15%
- Relaxing Atmosphere / Ambiance: 15%
- Friendly People: 12%
- Family Friendly: 10%
- "Attractions (Museums,…)": 9%
- Shopping: 9%
- Clean: 7%
- Accessible / Convenient / Walkable: 6%
- Safe: 3%
- Great Location / Easy to get to: 1%

Feelings in SPC Area (Unaided)

- Calm / Relaxed: 44%
- Happy: 40%
- Refreshed / Healthy: 10%
- Amazing: 8%
- Fine / Good: 7%
- Welcomed: 7%
- Entertained: 6%
- Energized / Excited: 5%
- Comfortable: 4%
- Safe: 3%

## 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>65%</td>
</tr>
<tr>
<td>Cheaper &amp; More Parking</td>
<td>22%</td>
</tr>
<tr>
<td>Less congestion / traffic</td>
<td>13%</td>
</tr>
<tr>
<td>More public restrooms</td>
<td>8%</td>
</tr>
<tr>
<td>More Public Transportation Options</td>
<td>4%</td>
</tr>
<tr>
<td>More shaded / green areas</td>
<td>3%</td>
</tr>
<tr>
<td>Better Signage /accessibility</td>
<td>2%</td>
</tr>
<tr>
<td>More Affordable</td>
<td>1%</td>
</tr>
<tr>
<td>Bars and food options on the beach</td>
<td>1%</td>
</tr>
<tr>
<td>Tourist Information</td>
<td>1%</td>
</tr>
<tr>
<td>Restaurant Diversity</td>
<td>1%</td>
</tr>
<tr>
<td>Finish the Pier</td>
<td>0%</td>
</tr>
<tr>
<td>More Shopping</td>
<td>0%</td>
</tr>
<tr>
<td>Clean it up</td>
<td>0%</td>
</tr>
<tr>
<td>More Activities / Attractions</td>
<td>0%</td>
</tr>
</tbody>
</table>

### When Decision to Visit was Made / Travel Planning Resources Used

#### Average Time Between Decision to Visit and Arrival

- **50.0 Days in Advance**

#### Resources Used before Arrival and While In Market

<table>
<thead>
<tr>
<th>Resource</th>
<th>Before Arriving</th>
<th>While in St. Pete/Clearwater Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opinions of friends or relatives</td>
<td>23%</td>
<td>53%</td>
</tr>
<tr>
<td>User-generated content/Review websites, such as Yelp and...</td>
<td>19%</td>
<td>47%</td>
</tr>
<tr>
<td>Online travel agencies (Expedia, Travelocity, etc.)</td>
<td>1%</td>
<td>39%</td>
</tr>
<tr>
<td>Travel guides, brochures</td>
<td>8%</td>
<td>17%</td>
</tr>
<tr>
<td>Social Media content</td>
<td>16%</td>
<td>13%</td>
</tr>
<tr>
<td>Official St. Petersburg/Clearwater area</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>YouTube or other online videos</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>Television programming</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Gulf to Bay St. Pete/Clearwater Destination Magazine</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Lifestyle or travel magazines</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Newspaper travel section</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>Travel agency (traditional, offline)</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Radio programming</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

**Base: 2022 - March 401 responses.**
Experience Satisfaction / Earned & Paid Media Recall

Overall Satisfaction

- Very satisfied: 86%
- Satisfied: 14%
- Neutral—neither satisfied nor unsatisfied: 0%
- Unsatisfied: 0%
- Very unsatisfied: 0%

Media Recall

- Yes: 53%
- No: 44%
- Maybe/Not sure: 3%

Likelihood to Recommend / Likelihood to Return

Likelihood to Recommend

9.7 / 10

Likelihood to Return

9.6 / 10

Demographics

**Gender Distribution:**
- Female: 56%
- Male: 44%
- Other: 0%
- I prefer not to answer: 0%

**Age Distribution:**
Average Age: 53.2

**Income Distribution:**
Average Income: $14

**Ethnicity Distribution:**
- Caucasian: 93%
- Black/African-American: 2%
- Latino/Hispanic: 2%
- Asian/Pacific Islander: 1%
- American Indian/Alaska Native: 0%
- Other: 0%
- I prefer not to answer: 2%

**Marital Status Distribution:**
- Single: 21%
- Single with children under 18: 1%
- Married/partnered: 53%
- Married/partnered with children under 18: 17%
- Other: 8%
- I prefer not to answer: 0%

**Sexual Orientation Distribution:**
- Heterosexual: 90%
- LGBTQ: 2%
- Other: 4%
- I prefer not to answer: 4%

**Base:** 2022 - March 401 responses.
Visit St. Pete Clearwater
Visitor Profile Study
Infographic Profile: 2022 - March 401 responses.
Infographic Profile: 2022 - March 401 responses.

Domestic vs. International
- United States Resident: 94%
- International Visitor: 6%

Point of Origin: Top States
- Florida: 36%
- Michigan: 7%
- New York: 6%

Factors Important to Destination Decision
- Beaches that suit my tastes: 44%
- Friends or family in the area: 33%
- Weather: 27%
- Attractions in the area: 12%
- Food scene: 11%
- Overall ambiance & atmosphere: 10%

- Millennials: 5.8%
- Gen X: 41.2%
- Baby Boomers: 26.4%
Infographic Profile: 2022 - March 401 responses.

Length of Stay
2.9 Days (on average)

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

Travel Party Size
- 2.1 People
- 19.9% Traveled with Children

Top Communities Visited
- Clearwater Beach: 65%
- Madeira Beach: 45%
- St. Pete Beach: 32%
- Treasure Island: 31%
- Clearwater: 26%

Daily Spending
- $100.11 Per Person

Top Activities
- Visit the beach: 79%
- Dining in restaurants: 78%
- Shopping: 55%
- Photography: 35%