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 520 for January 2022.
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
VISIT ST. PETE/CLEARWATER January 2022

Average Time Between Decision to Visit & Arrival

- Jan-22: 64.4
- Jan-21: 61.6
- Jan-20: 42.9

Travel Party Size

- Jan-22: 2.3
- Jan-21: 2.5
- Jan-20: 2.3

Average Days & Nights

- Jan-20 Days: 3.3
- Jan-21 Days: 3.4
- Jan-22 Days: 3.8
- Jan-20 Nights: 2.4
- Jan-21 Nights: 2.9
- Jan-22 Nights: 3.2

Percent Staying Overnight

- Jan-20: 40.4%
- Jan-21: 39.2%
- Jan-22: 54.6%

Average Age

- Jan-20: 49.2
- Jan-21: 50.1
- Jan-22: 50.1

Average Daily Spending

- Jan-22: $255.80
- Jan-21: $244.40
- Jan-20: $202.96

Generations

- Millennial or younger: 46.7%
- Gen X: 44.5%
- Boomer or older: 42.6%

Average Income

- Jan-22: $97,298
- Jan-21: $118,870
- Jan-20: $90,282
VISIT ST. PETE/CLEARWATER  Calendar Year 2021

Average Time Between Decision to Visit & Arrival

- 2019: 71.0
- 2020: 45.5
- 2021: 50.9

Average Days & Nights

Days
- 2019: 2.1
- 2020: 2.3
- 2021: 2.7

Nights
- 2019: 1.9
- 2020: 2.7
- 2021: 3.6

Average Age

- 2019: 48.5
- 2020: 49.0
- 2021: 48.8

Average Daily Spending

- 2021: $270.17
- 2019: $216.64
- 2020: $225.22

Percent Staying Overnight

- 2019: 43.4%
- 2020: 32.2%
- 2021: 38.2%

Average Income

- 2021: $107,854
- 2020: $98,369
- 2019: $95,454

Generations

- Millennial or younger: 41.8%, 41.0%, 38.5%
- Gen X: 36.8%, 40.3%, 42.7%
- Boomer or older: 21.3%, 18.7%, 18.9%
DETAILED FINDINGS
Point of Origin

**Country of Origin**
- United States: 95%
- Canada: 3%
- Germany: 1%
- Mexico: 0%
- United Kingdom: 0%
- France: 0%
- China: 0%
- Other: 1%

**Base:** United States

**State of Origin**
- Florida: 33%
- New York: 8%
- Illinois: 6%
- Ohio: 6%
- Texas: 5%
- Michigan: 3%
- Indiana: 3%
- New Jersey: 3%
- California: 3%
- Iowa: 2%
- Wisconsin: 2%
- Minnesota: 2%

**MSA of Origin**
- Tampa, FL: 17%
- Sarasota-Bradenton, FL: 7%
- Chicago, IL: 5%
- New York, NY-NJ: 4%
- Columbus, OH: 3%
- Orlando, FL: 3%
- Grand Rapids-Muskegon: 2%
- Tallahassee, FL: 2%
- Indianapolis, IN: 2%
- Atlanta, GA: 2%
- Naples, FL: 2%
- Austin-San Marcos, TX: 1%

**Base:** United States

**Country:** United States, Canada, Germany, Mexico, United Kingdom, France, China, Other

**Base:** United States

**MSA:** Tampa, FL, Sarasota-Bradenton, FL, Chicago, IL, New York, NY-NJ, Columbus, OH, Orlando, FL, Grand Rapids-Muskegon, Tallahassee, FL, Indianapolis, IN, Atlanta, GA, Naples, FL, Austin-San Marcos, TX
Lodging Type / Daily Spending in Market

**Lodging Type**
- Hotel, resort or motel in SPC: 17%
- Home share rental in the SPC: 4%
- Condo/vacation home in the SPC: 7%
- Private residence in SPC: 26%
- Day trip: 45%

**Daily Spending**
- Restaurants: $79
- Hotel/motel/inn/condo/vacation home in SPC: $57
- Retail store purchases: $51
- Other Entertainment & sightseeing: $31
- Gas, parking and local transportation: $19
- Car rental (in area only): $5
- Other: $9

**Mean Travel Party Spending** = $251.55
**Avg # of People Covered by Spending** = 2.15
**Mean Spending Per Person** = $116.80

Base: 2022 - January 520 responses.
Days & Nights in St. Pete/Clearwater

Days in Market

- 10 or more: 8%
- 9: 0%
- 8: 3%
- 7: 7%
- 6: 8%
- 5: 13%
- 4: 12%
- 3: 7%
- 2: 3%
- 1: 40%

Mean Days
- ≤ 30: 3.8
- > 30: 5.3

Nights in Market

- 10 or more: 6%
- 9: 1%
- 8: 1%
- 7: 6%
- 6: 5%
- 5: 16%
- 4: 12%
- 3: 7%
- 2: 2%
- 1: 1%
- 0: 43%

Mean Nights
- ≤ 30: 3.2
- > 30: 4.4

Base: 2022 - January 520 responses.
### Primary Reason for Visit

- **Vacation**: 38%
- **Visit friends or family in the area**: 37%
- **Weekend getaway**: 10%
- **Other personal reasons**: 6%
- **Attend special event, exhibition or concert**: 6%
- **Business**: 1%
- **Conference/tradeshow or other group meeting**: 1%
- **Wedding**: 1%
- **On or pre/post a cruise**: 1%
- **Attend sports event/tournament**: 0%
- **Government business/travel**: 0%
- **Honeymoon**: 0%

### Other Destinations Visited on SPC Trip

- **Tampa**: 32%
- **Sarasota Area**: 9%
- **Orlando/Disney**: 6%
- **Ft. Myers/SW Florida**: 3%
- **Lakeland/Winter Haven**: 2%
- **Crystal River**: 2%
- **Ocala/Gainesville**: 1%
- **Miami**: 1%
- **Florida Keys**: 1%
- **Ft. Lauderdale/Palm Beach**: 1%
- **Jax/St. Augustine**: 1%
- **Panhandle**: 0%
- **Daytona**: 0%
- **Kennedy/Space**: 0%
- **Sebring**: 0%
- **Everglades**: 0%
- **Tallahassee**: 0%
- **NONE—The St.**: 55%

*Base: 2022 - January 520 responses.*
Method of Arrival / Arrival Airport & Airline

**Method of Arrival**

- Personal vehicle: 62%
- Airline: 30%
- Rental vehicle: 8%
- Rideshare (Uber, Lyft, etc.): 3%
- RV: 0%
- Tour bus: 0%
- Public bus: 0%
- Train: 0%
- Taxi or limo: 0%
- Other: 1%

**Method of Departure**

- Personal vehicle: 62%
- Airline: 27%
- Rental vehicle: 8%
- Rideshare (Uber, Lyft, etc.): 3%
- RV: 0%
- Public bus: 0%
- Train: 0%
- Tour bus: 0%
- Taxi or limo: 0%
- Other: 1%

Base: 2022 - January 520 responses.
### Method of Arrival / Arrival Airport & Airline

#### Airport of Arrival
- Tampa Int'l.: 57%
- St. Pete-Clearwater Int'l: 33%
- Orlando Int'l.: 6%
- Sarasota/Bradenton Int'l: 2%
- Miami Int'l.: 1%
- Sanford Int'l: 1%
- Palm Beach Int'l: 1%
- SW Fl Int'l. (Ft. Myers): 0%
- Ft. Lauderdale Int'l.: 0%
- Jacksonville Int'l.: 0%
- Other: 0%

#### Airline Used by Airport of Arrival
- **Tampa Int'l.**
  - Allegiant: 1.0%
  - Southwest: 21.3%
  - Delta Airlines: 16.4%
  - American Airlines: 8.7%
  - United: 4.6%
  - Jet Blue: 0.9%
  - Sun Country: 2.3%
  - Alaska Airlines: 6.4%
  - Other: 0%

- **St. Pete-Clearwater Int'l**
  - Allegiant: 0.0%
  - Southwest: 0.0%
  - Delta Airlines: 0.9%
  - American Airlines: 0.0%
  - United: 0.0%
  - Jet Blue: 2.7%
  - Sun Country: 0.0%
  - Alaska Airlines: 0.0%
  - Other: 0.0%

*Base: 2022 - January 520 responses.*
Rental Vehicle Pick-Up City / Transportation Used In-Market

### Rental Vehicle Pick-Up City

- Tampa: 67%
- St. Petersburg/Clearwater area: 18%
- Orlando: 9%
- Sarasota/Bradenton: 3%
- Miami: 2%
- Ft. Myers: 0%
- Fort Lauderdale: 0%
- West Palm Beach: 0%
- Jacksonville: 0%
- Outside of Florida: 0%
- Sanford: 0%

### Transportation Used In-Market

- Personal vehicle: 72%
- Rental vehicle: 22%
- Uber, Lyft, etc.: 5%
- Public bus: 0%
- Bicycle: 0%
- Boat: 0%
- RV: 0%
- Motorcycle: 0%
- Free Beach Rides: 0%
- Taxi or limo: 0%
- Tour bus: 0%

Base: 2022 - January 520 responses.
Travel Party Composition / Travel Party Size

### Travel Party Composition

- **Solo**: 19%
- **Couple**: 59%
- **Immediate Family**: 21%
- **Extended Family**: 1%
- **Group of Couples**: 2%
- **Group of Friends**: 7%
- **Tour Group**: 0%
- **Business Associates**: 0%
- **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

*Average Travel Party Size = 2.3

Percent with Children = 15.2%

Base: 2022 - January 520 responses.
Important Factors to Destination Decision / Trip Activities

**Important to Decision to Visit**
- Weather: 66%
- Easy to get to: 55%
- Scenic beauty: 53%
- "Restaurants, cuisine, food scene": 51%
- Friends or family in the area: 51%
- Attractions in the area: 49%
- Recommendation from people I know: 45%
- Breweries/Distilleries/Craft beer: 42%
- The SPC area is family-friendly: 42%
- Beaches that suit my tastes: 41%
- Shopping opportunities: 41%
- The SPC area is romantic: 40%
- Overall ambiance & atmosphere: 35%
- Advertisements for the area: 35%
- St. Pete Pier: 33%

**Trip Activities**
- Dining in restaurants: 89%
- Visit the beach: 73%
- Shopping: 67%
- Visit friends or family: 52%
- Visit museums: 49%
- Photography: 44%
- Visit breweries and/or distilleries: 42%
- Bars/Nightlife: 35%
- Bird watching: 31%
- Swimming: 16%
- Guided tour: 15%
- Other boating: 9%
- Fishing: 6%
- Jet skiing: 4%
- Biking: 4%

*Base: 2022 - January 520 responses.*
First-Time Visit to Florida / Previous Visitation to St. Pete/Clearwater

First Time Visitors to Florida:
- Yes: 5.2%
- No: 94.8%

Previous Visitation to the St. Pete/Clearwater Area:
- First Time Visitor: 18%
- 1 - 10 Previous Visits: 40%
- 11 - 20 Previous Visits: 10%
- More than 20 Visits: 32%

Mean # of Past Trips = 13.0

Base: 2022 - January 520 responses.
Attractions Visited / Communities Visited

**Attractions Visited**

- St. Pete Pier: 50%
- Sunken Gardens: 26%
- Dali Art Museum: 18%
- Chihuly Exhibit: 15%
- Tarpon Springs: 3%
- Orlando area Theme Parks: 3%
- Busch Gardens: 3%
- Florida Aquarium in Tampa: 2%
- Clearwater Marine Aquarium: 2%
- Ft. Desoto Park: 1%
- Other: 12%
- NONE OF THESE: 28%

**Communities Visited**

- St. Petersburg: 77%
- Pinellas Park: 42%
- Madeira Beach: 38%
- Other: 42%
- St. Pete Beach: 26%
- Clearwater Beach: 24%
- Treasure Island: 19%
- Clearwater: 17%
- Indian Shores & Indian Rocks: 7%
- Largo: 6%
- Dunedin: 6%
- Tarpon Springs: 5%
- North Redington: 5%
- Gulfport: 3%
- Safety Harbor: 1%

Base: 2022 - January 520 responses.
Most Liked Aspects of SPC (Unaided)

- Everything: 55%
- Tropical Climate / Warm Weather: 55%
- Beaches / Ocean: 53%
- Scenic Beauty: 51%
- Entertainment / Variety of Fun: 47%
- Food / Restaurants & Bars: 46%
- Relaxing Atmosphere / Ambiance: 45%
- Great Location / Easy to get to: 44%
- Clean: 44%
- Friendly People: 44%
- "Attractions (Museums,…)": 44%
- Accessible / Convenient / Walkable: 43%
- Shopping: 42%
- Safe: 42%
- Family Friendly: 42%

Feelings in SPC Area (Unaided)

- Happy: 65%
- Refreshed / Healthy: 46%
- Amazing: 46%
- Energized / Excited: 44%
- Entertained: 43%
- Comfortable: 43%
- Welcomed: 42%
- Safe: 42%
- Calm / Relaxed: 41%
- Free: 13%

Base: 2022 - January 520 responses.
Attractions or Services that Would Enhance the Destination Experience

Additional Attractions or Services (Unaided)

- It needs no improvement: 95%
- Cheaper & More Parking: 2%
- More Activities / Attractions: 1%
- More Affordable: 1%
- Restaurant Diversity: 1%
- Bars and food options on the beach: 1%
- Less congestion / traffic: 0%
- More shaded / green areas: 0%
- More public restrooms: 0%
- Better Nightlife: 0%
- More Public Transportation Options: 0%
- More kid friendly activities: 0%
- Finish the Pier: 0%
- Tourist Information: 0%
- More Shopping: 0%

Base: 2022 - January 520 responses.
When Decision to Visit was Made / Travel Planning Resources Used

Average Time Between Decision to Visit and Arrival

42.9 Days in Advance

Resources Used before Arrival and While In Market

- **Opinions of friends or relatives**: 9.3% (BEFORE ARRIVING), 37.2% (WHILE IN MARKET)
- **Social Media content**: 18.0% (BEFORE ARRIVING), 37.2% (WHILE IN MARKET)
- **User-generated content/Review websites, such as Yelp and TripAdvisor**: 15.1% (BEFORE ARRIVING), 36.3% (WHILE IN MARKET)
- **Online travel agencies (Expedia, Travelocity, etc.)**: 4.1% (BEFORE ARRIVING), 23.7% (WHILE IN MARKET)
- **Official St. Petersburg/Clearwater area tourism website, www.VisitSTPeteClearwater.com**: 0.7% (BEFORE ARRIVING), 21.7% (WHILE IN MARKET)
- **Travel guides, brochures**: 9.1% (BEFORE ARRIVING), 32.4% (WHILE IN MARKET)
- **YouTube or other online videos**: 2.9% (BEFORE ARRIVING), 0.0% (WHILE IN MARKET)
- **Lifestyle or travel magazines**: 2.1% (BEFORE ARRIVING), 13.7% (WHILE IN MARKET)
- **Newspaper travel section**: 1.5% (BEFORE ARRIVING), 2.2% (WHILE IN MARKET)
- **Television programming**: 1.1% (BEFORE ARRIVING), 0.2% (WHILE IN MARKET)
- **Radio programming**: 0.8% (BEFORE ARRIVING), 0.6% (WHILE IN MARKET)
- **Travel agency (traditional, offline)**: 0.6% (BEFORE ARRIVING), 0.0% (WHILE IN MARKET)
- **Gulf to Bay St. Pete/Clearwater Destination Magazine**: 0.2% (BEFORE ARRIVING), 0.3% (WHILE IN MARKET)

Base: 2022 - January 520 responses.
Experience Satisfaction / Earned & Paid Media Recall

Overall Satisfaction

- Very satisfied: 98%
- Satisfied: 1%
- Neutral—neither satisfied nor unsatisfied: 0%
- Unsatisfied: 0%
- Very unsatisfied: 0%

Base: 2022 - January 520 responses.

Media Recall

- Yes: 22.6%
- Maybe/ Not sure: 8.8%
- No: 68.6%
Likelihood to Recommend / Likelihood to Return

Likelihood to Recommend

10.0 / 10

Likelihood to Return

9.9 / 10

Base: 2022 - January 520 responses.
Demographics

- **Gender:**
  - Female: 64.1%
  - Male: 35.9%

- **Marital Status:**
  - Single: 31%
  - Single with children under 18: 2%
  - Married/partnered: 53%
  - Married/partnered with children under 18: 13%
  - Other: 1%
  - I prefer not to answer: 0%

- **Ethnicity:**
  - Caucasian: 74%
  - Black/African-American: 11%
  - Latino/Hispanic: 6%
  - American Indian/Alaska Native: 4%
  - Asian/Pacific Islander: 4%
  - Other: 4%
  - I prefer not to answer: 0%

- **Orientation:**
  - Heterosexual: 55.4%
  - LGBTQ: 5.6%
  - Other: 38.6%
  - I prefer not to answer: 0.3%

**Base:** 2022 - January 520 responses.

**Average Age:** 49.2

**Average Income:** $14
Visit St. Pete Clearwater
Visitor Profile Study
Infographic Profile: 2022 - January 520 responses.
Infographic Profile: 2022 - January 520 responses.

- 21.5% Millennials
- 36.0% Gen X
- 27.1% Baby Boomers

**Domestic vs. International**
- United States Resident: 95.2%
- International Visitor: 4.8%

**Point of Origin: Top States**
- Florida: 33%
- New York: 8%
- Illinois: 6%

**Factors Important to Destination Decision**
- Weather: 66%
- Easy to get to: 55%
- Scenic beauty: 53%
- "Restaurants, cuisine, food scene": 51%
- Friends or family in the area: 51%
- Attractions in the area: 49%
Infographic Profile: 2022 - January 520 responses.

Length of Stay
3.8 Days (on average)

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

Travel Party Size
- 2.3 People
- 19.7% Traveled with Children

Daily Spending
- $105.29 Per Person

Top Communities Visited
- St. Petersburg: 77%
- Pinellas Park: 45%
- Madeira Beach: 43%
- St. Pete Beach: 29%
- Clearwater Beach: 25%

Top Activities
- Dining in restaurants: 89%
- Visit the beach: 73%
- Shopping: 67%
- Visit friends or family: 52%