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

Research prepared for Visit St. Pete/Clearwater by:

Destination Analysts

Pinellas County – December 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 438 for December 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
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
### Average Time Between Decision to Visit & Arrival
- Dec-19: 76.7
- Dec-20: 49.7
- Dec-21: 32.8

### Travel Party Size
- Dec-20: 2.7
- Dec-19: 2.4
- Dec-21: 2.1

### Average Days & Nights
- Days:
  - Dec-19: 3.1
  - Dec-20: 2.7
  - Dec-21: 3.3
- Nights:
  - Dec-19: 1.9
  - Dec-20: 2.5
  - Dec-21: 2.5

### Generations
- Millennial or younger: 41.0%
- Gen X: 31.9%
- Boomer or older: 34.9%

### Average Age
- Dec-19: 46.9
- Dec-20: 46.8
- Dec-21: 48.2

### Average Daily Spending
- Dec-21: $233.07
- Dec-20: $253.63
- Dec-19: $215.09

### Percent Staying Overnight
- Dec-19: 41.9%
- Dec-20: 29.2%
- Dec-21: 45.4%

### Average Income
- Dec-21: $96,486
- Dec-20: $115,876
- Dec-19: $94,729
VISIT ST. PETE/CLEARWATER Q4 2021

**Average Time Between Q4isition to Visit & Arrival**
- Q4-19: 71.2
- Q4-20: 44.7
- Q4-21: 42.5

**Travel Party Size**
- Q4-21: 2.3
- Q4-19: 2.5
- Q4-20: 2.7

**Average Days & Nights**
- Days:
  - Q4-19: 3.0
  - Q4-20: 2.7
  - Q4-21: 3.6
- Nights:
  - Q4-19: 1.7
  - Q4-20: 2.4
  - Q4-21: 2.7

**Generations**
- Millennial or younger: 39.2%
- Gen X: 37.9%
- Boomer or older: 36.1%

**Average Age**
- Q4-19: 47.7
- Q4-20: 48.2
- Q4-21: 47.8

**Average Daily Spending**
- Q4-21: $260.01
- Q4-20: $242.33
- Q4-19: $220.71

**Percent Staying Overnight**
- Q4-19: 44.4%
- Q4-20: 29.5%
- Q4-21: 39.5%

**Average Income**
- Q4-21: $105,097
- Q4-20: $105,143
- Q4-19: $92,241
VISIT ST. PETE/CLEARWATER Quarterly Comparison

Average Time Between Decision to Visit & Arrival
- Q1-21: 60.1
- Q2-21: 53.7
- Q3-21: 49.0
- Q4-21: 42.5

Travel Party Size
- Q1-21: 2.5
- Q2-21: 2.6
- Q3-21: 2.7
- Q4-21: 2.3

Average Days & Nights
- Days: Q1-21 = 3.0, Q2-21 = 3.0, Q3-21 = 3.0, Q4-21 = 3.0
- Nights: Q1-21 = 2.0, Q2-21 = 2.1, Q3-21 = 2.4, Q4-21 = 2.5

Generations
- Millennial or younger: Q1-21 = 45.5%, Q2-21 = 44.8%, Q3-21 = 44.6%, Q4-21 = 42.6%
- Gen X: Q1-21 = 34.7%, Q2-21 = 38.9%, Q3-21 = 20.5%, Q4-21 = 21.4%
- Boomer or older: Q1-21 = 15.6%, Q2-21 = 17.7%, Q3-21 = 17.7%, Q4-21 = 36.1%

Average Age
- Q1-21 = 47.7
- Q2-21 = 48.2
- Q3-21 = 47.4
- Q4-21 = 50.8

Average Daily Spending
- Q4-21 = $260
- Q1-21 = $268
- Q2-21 = $274
- Q3-21 = $281

Average Income
- Q4-21 = $105,097
- Q1-21 = $111,830
- Q2-21 = $108,907
- Q3-21 = $105,882

Percent Staying Overnight
- Q1-21: 38.5%
- Q2-21: 36.4%
- Q3-21: 38.0%
- Q4-21: 39.5%
**Average Time Between Decision to Visit & Arrival**

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

**Travel Party Size**

- 2021: 2.5
- 2020: 2.6
- 2019: 2.6

**Average Days & Nights**

- Days:
  - 2019: 3.1
  - 2020: 2.7
  - 2021: 3.6
- Nights:
  - 2019: 1.9
  - 2020: 2.3
  - 2021: 2.7

**Percent Staying Overnight**

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

**Average Age**

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

**Average Income**

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

**Generations**

- Millennial or younger: 41.8%
- Gen X: 41.0%
- Boomer or older: 38.5%
DETAILED FINDINGS
### Point of Origin

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<tr>
<td>China</td>
<td>0%</td>
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<tr>
<td>Other</td>
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### State of Origin

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<th>State</th>
<th>Base: 2021 - December 438 responses.</th>
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<tbody>
<tr>
<td>Florida</td>
<td>44%</td>
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<tr>
<td>Indiana</td>
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<tr>
<td>Ohio</td>
<td>5%</td>
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<tr>
<td>New York</td>
<td>5%</td>
</tr>
<tr>
<td>Illinois</td>
<td>4%</td>
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<tr>
<td>Texas</td>
<td>4%</td>
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<tr>
<td>Michigan</td>
<td>3%</td>
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<tr>
<td>Pennsylvania</td>
<td>3%</td>
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<tr>
<td>Georgia</td>
<td>3%</td>
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<tr>
<td>Virginia</td>
<td>2%</td>
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<tr>
<td>New Jersey</td>
<td>2%</td>
</tr>
<tr>
<td>Iowa</td>
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### MSA of Origin

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<th>Base: 2021 - December 438 responses.</th>
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<tr>
<td>Orlando, FL</td>
<td>8%</td>
</tr>
<tr>
<td>Sarasota-Bradenton, FL</td>
<td>7%</td>
</tr>
<tr>
<td>Chicago, IL</td>
<td>4%</td>
</tr>
<tr>
<td>New York, NY-NJ</td>
<td>3%</td>
</tr>
<tr>
<td>Atlanta, GA</td>
<td>3%</td>
</tr>
<tr>
<td>Miami, FL</td>
<td>3%</td>
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<tr>
<td>Kansas City, MO-KS</td>
<td>2%</td>
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<tr>
<td>Newark, NJ</td>
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<tr>
<td>Indianapolis, IN</td>
<td>2%</td>
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<tr>
<td>Washington, DC-MD-VA</td>
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<tr>
<td>Houston, TX</td>
<td>2%</td>
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</table>
Base: 2021 - December 438 responses.
Days & Nights in St. Pete/Clearwater

**Days in Market**
- 1 day: 48%
- 2 days: 13%
- 3 days: 8%
- 4 days: 6%
- 5 days: 3%
- 6 days: 3%
- 7 days: 8%
- 8 days: 8%
- 9 days: 0%
- 10 or more: 3%

**Nights in Market**
- 1 day: 49%
- 10 or more: 3%
- 2 days: 13%
- 3 days: 8%
- 4 days: 10%
- 5 days: 13%
- 6 days: 8%
- 7 days: 5%
- 8 days: 0%
- 9 days: 0%

**Mean Days**
- (≤ 30) = 3.1
- (> 30) = 4.8

**Mean Nights**
- (≤ 30) = 2.5
- (> 30) = 4.0

Base: 2021 - December 438 responses.
Primary Reason for Visit / Other Destinations Visited

**Primary Reason for Visit**
- Vacation: 44%
- Visit friends or family in the area: 36%
- Other personal reasons: 11%
- Weekend getaway: 3%
- Attend special event, exhibition or concert: 3%
- Wedding: 2%
- Business: 1%
- Conference/tradeshow or other group meeting: 1%
- Attend sports event/tournament: 1%
- On or pre/post a cruise: 0%
- Government business/travel: 0%
- Honeymoon: 0%

**Other Destinations Visited on SPC Trip**
- Tampa: 25%
- Sarasota Area: 11%
- Orlando/Disney: 7%
- Crystal River: 3%
- Ft. Myers/SW Florida: 2%
- Ocala/Gainesville: 2%
- Lakeland/Winter Haven: 2%
- Miami: 1%
- Jax/St. Augustine: 1%
- Tallahassee: 1%
- Ft. Lauderdale/Palm Beach: 0%
- Kennedy/Space…: 0%
- Daytona: 0%
- Florida Keys: 0%
- Panhandle: 0%
- Sebring: 0%
- Everglades: 0%
- NONE—The St…: 55%

Base: 2021 - December 438 responses.
Method of Arrival / Arrival Airport & Airline

**Method of Arrival**

- Personal vehicle: 64%
- Airline: 38%
- Rental vehicle: 5%
- Rideshare (Uber, Lyft, etc.): 1%
- Tour bus: 1%
- RV: 0%
- Train: 0%
- Public bus: 0%
- Taxi or limo: 0%
- Other: 0%

**Method of Departure**

- Personal vehicle: 64%
- Airline: 29%
- Rental vehicle: 6%
- Rideshare (Uber, Lyft, etc.): 2%
- Tour bus: 1%
- RV: 0%
- Train: 0%
- Public bus: 0%
- Taxi or limo: 0%
- Other: 0%

Base: 2021 - December 438 responses.
Method of Arrival / Arrival Airport & Airline

### Airport of Arrival

- Tampa Int'l.: 67%
- St. Pete-Clearwater Int'l: 21%
- Sarasota/Bradenton Int'l: 6%
- Orlando Int'l: 5%
- 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: 42.6%
- Allegiant: 0.6%
- Delta Airlines: 26.9%
- United: 11.0%
- American Airlines: 10.2%
- Jet Blue: 0.6%
- Sun Country: 0.0%
- Alaska Airlines: 0.0%
- Other: 8.1%

#### St. Pete-Clearwater Int'l
- Allegiant: 91.6%
- Other: 2.0%

Base: 2021 - December 438 responses.
### Rental Vehicle Pick-Up City / Transportation Used In-Market

#### Rental Vehicle Pick-Up City
- **Tampa**: 71%
- **St. Petersburg/ Clearwater area**: 11%
- **Orlando**: 9%
- **Sarasota/Bradenton**: 7%
- **Miami**: 1%
- **Fort Lauderdale**: 1%
- **Ft. Myers**: 0%
- **West Palm Beach**: 0%
- **Jacksonville**: 0%
- **Outside of Florida**: 0%
- **Sanford**: 0%

#### Transportation Used In-Market
- **Personal vehicle**: 74%
- **Rental vehicle**: 22%
- **Uber, Lyft, etc.**: 4%
- **Tour bus**: 1%
- **Taxi or limo**: 0%
- **Free Beach Rides**: 0%
- **Public bus**: 0%
- **Bicycle**: 0%
- **Motorcycle**: 0%
- **RV**: 0%
- **Boat**: 0%

*Base: 2021 - December 438 responses.*
Travel Party Composition / Travel Party Size

**Travel Party Composition**
- Solo: 21%
- Couple: 56%
- Immediate Family: 23%
- Extended Family: 0%
- Group of Couples: 0%
- Group of Friends: 0%
- Tour Group: 0%
- Business Associates: 0%
- Other: 0%

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

Avg Travel Party Size = 2.1
Percent with Children = 12.5%

Base: 2021 - December 438 responses.
Important Factors to Destination Decision / Trip Activities

Important to Decision to Visit

- Easy to get to: 66%
- Weather: 60%
- Scenic beauty: 56%
- Restaurants, cuisine, food scene: 56%
- Friends or family in the area: 51%
- Attractions in the area: 47%
- Beaches that suit my tastes: 45%
- Recommendation from people I trust: 42%
- Shopping opportunities: 36%
- Breweries/Distilleries/Craft beer: 35%
- St. Pete Pier: 26%
- Overall ambiance & atmosphere: 25%
- Advertisements for the area: 23%
- The SPC area is romantic: 21%
- The SPC area is family-friendly: 18%

Trip Activities

- Dining in restaurants: 98%
- Visit the beach: 73%
- Shopping: 68%
- Visit friends or family: 50%
- Bars/Nightlife: 42%
- Visit breweries and/or distilleries: 32%
- Swimming: 29%
- Visit museums: 24%
- Photography: 23%
- Bird watching: 21%
- Guided tour: 16%
- Jet skiing: 7%
- Fishing: 5%
- Other boating: 4%
- Take a dining cruise: 3%

Base: 2021 - December 438 responses.
**First-Time Visit to Florida / Previous Visitation to the St. Pete/Clearwater Area**

**First Time Visitors to Florida**
- Yes: 3%
- No: 97%

**Previous Visitation to the St. Pete/Clearwater Area**
- First Time Visitor: 16%
- 1 - 10 Previous Visits: 37%
- 11 - 20 Previous Visits: 6%
- More than 20 Visits: 41%

Mean # of Past Trips = 15.0

**Base:** 2021 - December 438 responses.
Attractions Visited / Communities Visited

Attractions Visited

- St. Pete Pier: 31%
- Dali Art Museum: 14%
- Chihuly Exhibit: 10%
- Sunken Gardens: 4%
- Tarpon Springs: 3%
- Orlando area Theme Parks: 2%
- Clearwater Marine Aquarium: 2%
- Busch Gardens: 1%
- Florida Aquarium in Tampa: 1%
- Enchanted: 0%
- Other: 3%
- NONE OF THESE: 52%

Communities Visited

- St. Petersburg: 61%
- Madeira Beach: 42%
- Clearwater Beach: 41%
- St. Pete Beach: 29%
- Clearwater: 23%
- Pinellas Park: 20%
- Treasure Island: 14%
- Largo: 12%
- Seminole: 8%
- Indian Shores & Indian Rocks Beach: 7%
- Tarpon Springs: 6%
- Dunedin: 5%
- North Redington Beach/Redington Beach: 4%
- Palm Harbor: 2%
- Gulfport: 2%

Base: 2021 - December 438 responses.
Most Liked Aspect / Feelings in St. Pete-Clearwater

Most Liked Aspects of SPC (Unaided)

- Tropical Climate / Warm Weather: 55%
- Beaches / Ocean: 52%
- Food / Restaurants & Bars: 48%
- Great Location / Easy to get to: 48%
- Relaxing Atmosphere / Ambiance: 47%
- Clean: 47%
- Accessible / Convenient / Walkable: 46%
- Scenic Beauty: 46%
- Friendly People: 46%
- Entertainment / Variety of Fun: 45%
- Safe: 44%
- Everything: 44%
- Shopping: 35%
- Attractions (Museums, Aquarium, …): 30%
- Family Friendly: 17%

Feelings in SPC Area (Unaided)

- Happy: 61%
- Welcomed: 43%
- Entertained: 43%
- Comfortable: 43%
- Energized / Excited: 41%
- Safe: 40%
- Refreshed / Healthy: 38%
- Calm / Relaxed: 37%
- Amazing: 36%
- Fine / Good: 4%

Base: 2021 - December 438 responses.
Attractions or Services that Would Enhance the Destination Experience

Additional Attractions or Services (Unaided)

- It needs no improvement: 96%
- Cheaper & More Parking: 2%
- More public restrooms: 1%
- Less congestion / traffic: 1%
- Restaurant Diversity: 0%
- More Shopping: 0%
- More Public Transportation Options: 0%
- Finish the Pier: 0%
- More Affordable: 0%
- Bars and food options on the beach: 0%
- Tourist Information: 0%
- More shaded / green areas: 0%
- Better Signage / accessibility: 0%
- More kid friendly activities: 0%
- Better Nightlife: 0%

Base: 2021 - December 438 responses.
When Decision to Visit was Made / Travel Planning Resources Used

Average Time Between Decision to Visit and Arrival

32.8 Days in Advance

Resources Used before Arrival and While In Market

Before Arriving

- User-generated content/Review websites, such as Yelp and... 49%
- Official St. Petersburg/Clearwater area tourism website,.... 40%
- Opinions of friends or relatives 38%
- Social Media content 36%
- Online travel agencies (Expedia, Travelocity, etc.) 24%
- Travel guides, brochures 22%
- Lifestyle or travel magazines 22%
- Travel agency (traditional, offline) 21%
- Newspaper travel section 20%
- Television programming 20%
- Radio programming 20%
- YouTube or other online videos 19%
- Gulf to Bay St. Pete/Clearwater Destination Magazine 19%

While In St. Pete/Clearwater Area

- User-generated content/Review websites, such as Yelp and... 1%
- Official St. Petersburg/Clearwater area tourism website,.... 1%
- Opinions of friends or relatives 1%
- Social Media content 1%
- Online travel agencies (Expedia, Travelocity, etc.) 1%
- Travel guides, brochures 1%
- Lifestyle or travel magazines 1%
- Travel agency (traditional, offline) 1%
- Newspaper travel section 1%
- Television programming 1%
- Radio programming 1%
- YouTube or other online videos 1%
- Gulf to Bay St. Pete/Clearwater Destination Magazine 1%

Base: 2021 - December 438 responses.
Experience Satisfaction / Earned & Paid Media Recall

Overall Satisfaction

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

Media Recall

- Yes: 29%
- No: 69%
- Maybe/Not sure: 3%

Base: 2021 - December 438 responses.
Likelihood to Recommend / Likelihood to Return

Likelihood to Recommend: 9.9 / 10
Likelihood to Return: 9.9 / 10

Base: 2021 - December 438 responses.
Demographics

- **Gender**
  - Female: 70%
  - Male: 29%
  - Other: 0%
  - I prefer not to answer: 0%

- **Age**
  - Average Age: 46.9

- **Income**
  - Average Income: $96,486

- **Ethnicity**
  - Caucasian: 73%
  - Black/African-American: 14%
  - Latino/Hispanic: 5%
  - Asian/Pacific Islander: 5%
  - American Indian/Alaska Native: 2%
  - Other: 1%
  - I prefer not to answer: 0%

- **Marital Status**
  - Single: 33%
  - Single with children under 18: 2%
  - Married/partnered: 53%
  - Married/partnered with children under 18: 10%
  - Other: 2%
  - I prefer not to answer: 1%

- **Sexual Orientation**
  - Heterosexual: 54%
  - LGBTQ: 6%
  - Other: 40%
  - I prefer not to answer: 0%

**Base:** 2021 - December 438 responses.
Visit St. Pete Clearwater
Visitor Profile Study
Infographic Profile: 2021 - December 438 responses.
Infographic Profile: 2021 - December 438 responses.

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

Domestic vs. International

- **Florida**: 44%
- **Indiana**: 5%
- **Ohio**: 5%

Point of Origin: Top States

Factors Important to Destination Decision

- Easy to get to: 66%
- Weather: 60%
- Scenic beauty: 56%
- Restaurants, cuisine, food scene: 56%
- Friends or family in the area: 51%
- Attractions in the area: 47%
Infographic Profile: 2021 - December 438 responses.

**Length of Stay**
- 3.1 Days (on average)

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

**Top Communities Visited**
- St. Petersburg: 62%
- Madeira Beach: 43%
- Clearwater Beach: 37%
- St. Pete Beach: 31%
- Clearwater: 21%

**Travel Party Size**
- 2.1 People
- 12.5% Traveled with Children

**Daily Spending**
- $103.38 Per Person

**Top Activities**
- Dining in restaurants: 98%
- Visit the beach: 73%
- Shopping: 68%
- Visit friends or family: 50%