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 detailed in the table to the right.

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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:

- Beach Drive
- Clearwater Beach
- Hyatt Place
- John's Pass Village & Boardwalk
- Museum of Fine Arts
- Pier 60
- Pier 60 Sugar Sand Festival
- Sandpearl Resort
- Shephard’s Beach Resort
- St. Pete Pier
- St. Petersburg Saturday Morning Market
- St. Petersburg-Clearwater International Airport
- Straub Park
- Sunken Gardens
- Tampa International Airport
- The Chihuly Collection
- The Dali Museum
- 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
### Country of Origin
- United States: 99%
- Canada: 0%
- Germany: 0%
- United Kingdom: 0%
- France: 0%
- Mexico: 0%
- China: 0%
- Other: 0%

### State of Origin
- Florida: 40%
- Ohio: 9%
- Illinois: 6%
- New York: 5%
- Georgia: 3%
- Indiana: 3%
- Pennsylvania: 3%
- Tennessee: 3%
- Michigan: 2%
- New Jersey: 2%
- Virginia: 2%
- Iowa: 2%

### MSA of Origin
- Tampa, FL: 20%
- Sarasota-Bradenton, FL: 8%
- Orlando, FL: 5%
- Chicago, IL: 5%
- Columbus, OH: 3%
- Atlanta, GA: 3%
- Cincinnati, OH-KY-IN: 2%
- Fort Myers-Cape Coral, FL: 2%
- New York, NY-NJ: 2%
- Detroit, MI: 2%
- Lakeland-Winter Haven, FL: 2%
- Indianapolis, IN: 2%

**Base:** 2021 - May 462 responses.
### Lodging Type / Daily Spending in Market

<table>
<thead>
<tr>
<th>Lodging Type</th>
<th>Daily Spending</th>
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<tr>
<td>Hotel, resort or motel in SPC</td>
<td>6%</td>
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<tr>
<td>Home share rental in the SPC</td>
<td>9%</td>
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<tr>
<td>Condo/vacation home in the SPC</td>
<td>2%</td>
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<tr>
<td>Private residence in SPC</td>
<td>64%</td>
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**Mean Travel Party Spending = $255**

**Avg # of People Covered by Spending = 2**

**Mean Spending Per Person = $110**

**Base:** 2021 - May 462 responses.
Days & Nights in St. Pete/Clearwater

Base: 2021 - May 462 responses.
### Primary Reason for Visit

- **Vacation**: 59%
- **Visit friends or family in the area**: 15%
- **Other personal reasons**: 12%
- **Weekend getaway**: 9%
- **Attend special event, exhibition or concert**: 3%
- **Business**: 1%
- **Conference/tradeshow or other group meeting**: 0%
- **Wedding**: 0%
- **Honeymoon**: 0%
- **Attend sports event/tournament**: 0%
- **On or pre/post a cruise**: 0%
- **Government business/travel**: 0%

### Other Destinations Visited on SPC Trip

- **Tampa**: 29%
- **Orlando/Disney**: 11%
- **Sarasota Area**: 10%
- **Ft. Myers/SW Florida**: 3%
- **Crystal River**: 3%
- **Lakeland/Winter Haven**: 3%
- **Florida Keys**: 2%
- **Ft. Lauderdale/Palm Beach**: 1%
- **Miami**: 1%
- **Kennedy/Space Center**: 0%
- **Jax/St. Augustine**: 0%
- **Ocala/Gainesville**: 0%
- **Panhandle**: 0%
- **Tallahassee**: 0%
- **Everglades**: 0%
- **Daytona**: 0%
- **Sebring**: 0%
- **NONE—The St. Thomas Area**: 46%

*Base: 2021 - May 462 responses.*
Method of Arrival / Arrival Airport & Airline

Method of Arrival

- Personal vehicle: 64%
- Airline: 36%
- Rental vehicle: 9%
- Rideshare (Uber, Lyft, etc.): 1%
- Taxi or limo: 0%
- RV: 0%
- Tour bus: 0%
- Train: 0%
- Public bus: 0%
- Other: 3%

Method of Departure

- Personal vehicle: 56%
- Airline: 32%
- Rental vehicle: 7%
- Rideshare (Uber, Lyft, etc.): 3%
- Taxi or limo: 1%
- RV: 0%
- Tour bus: 0%
- Train: 0%
- Public bus: 0%
- Other: 2%

Base: 2021 - May 462 responses.
Method of Arrival / Arrival Airport & Airline

**Base: 2021 - May 462 responses.**
**Rental Vehicle Pick-Up City / Transportation Used In-Market**

### Rental Vehicle Pick-Up City
- **Tampa**: 60%
- **Orlando**: 24%
- **St. Petersburg/ Clearwater area**: 12%
- **Miami**: 4%
- **Sanford**: 1%
- **Sarasota/Bradenton**: 0%
- **Ft. Myers**: 0%
- **Fort Lauderdale**: 0%
- **West Palm Beach**: 0%
- **Jacksonville**: 0%
- **Outside of Florida**: 0%

### Transportation Used In-Market
- **Personal vehicle**: 71%
- **Rental vehicle**: 20%
- **Uber, Lyft, etc.**: 7%
- **Taxi or limo**: 2%
- **Bicycle**: 2%
- **Free Beach Rides**: 1%
- **Boat**: 1%
- **Public bus**: 0%
- **Motorcycle**: 0%
- **Tour bus**: 0%
- **RV**: 0%

*Base: 2021 - May 462 responses.*
Travel Party Composition / Travel Party Size

**Travel Party Composition**
- **Solo**: 11%
- **Couple**: 49%
- **Immediate Family**: 30%
- **Extended Family**: 1%
- **Group of Couples**: 2%
- **Group of Friends**: 13%
- **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**

**Percent with Children = 19 %**

Base: 2021 - May 462 responses.
Important Factors to Destination Decision / Trip Activities

**Important to Decision to Visit**

- Beaches that suit my tastes: 35%
- Overall ambiance & atmosphere: 22%
- Scenic beauty: 21%
- Easy to get to: 20%
- Friends or family in the area: 20%
- Weather: 19%
- Arts & cultural offerings: 16%
- Recommendation from people I trust: 16%
- Attractions in the area: 12%
- A specific attraction: 10%
- St. Pete Pier: 10%
- Restaurants, cuisine, food scene: 8%
- Shopping opportunities: 5%
- The SPC area is family-friendly: 4%
- Outdoor recreational opportunities: 3%

**Trip Activities**

- Dining in restaurants: 88%
- Visit the beach: 54%
- Shopping: 48%
- Swimming: 36%
- Visit museums: 29%
- Visit friends or family: 19%
- Guided tour: 11%
- Other boating: 10%
- Photography: 10%
- Bars/Nightlife: 6%
- Attend a festival or special event: 3%
- Fishing: 3%
- Shelling: 3%
- Biking: 3%
- Jet skiing: 3%

Base: 2021 - May 462 responses.
First-Time Visit to Florida / Previous Visitation to St. Pete/Clearwater

First Time Visitors to Florida
- Yes: 8%
- No: 92%

Previous Visitation to the St. Pete/Clearwater Area
- First Time Visitor: 33%
- 1 - 10 Previous Visits: 41%
- 11 - 20 Previous Visits: 14%
- More than 20 Visits: 12%

Mean # of Past Trips = 23

Base: 2021 - May 462 responses.
Attractions Visited

- St. Pete Pier: 18%
- Dali Art Museum: 16%
- Chihuly Exhibit: 7%
- Orlando area Theme Parks: 6%
- Clearwater Marine Aquarium: 5%
- Sunken Gardens: 5%
- Tarpon Springs: 4%
- Ft. Desoto Park: 3%
- Busch Gardens: 2%
- Caladesi Island: 1%
- Other: 4%
- NONE OF THESE: 48%

Communities Visited

- St. Petersburg: 45%
- Clearwater Beach: 36%
- Madeira Beach: 26%
- St. Pete Beach: 17%
- Treasure Island: 11%
- Dunedin: 7%
- Clearwater: 6%
- Tarpon Springs: 5%
- Indian Shores & Indian Rocks Beach: 5%
- North Redington Beach/Redington: 3%
- Gulfport: 2%
- Largo: 2%
- Pass-A-Grille Beach: 2%
- Pinellas Park: 1%
- Oldsmar: 1%

Base: 2021 - May 462 responses.
Most Liked Aspects of St. Pete-Clearwater (SPC) (Unaided)

- Beaches / Ocean: 51%
- Scenic Beauty: 28%
- Tropical Climate / Warm Weather: 27%
- Everything: 19%
- Attractions (Museums, etc.): 13%
- Relaxing Atmosphere / Ambiance: 12%
- Entertainment / Variety of Fun: 9%
- Food / Restaurants & Bars: 7%
- Friendly People: 4%
- Accessible / Convenient / Safe: 4%
- Clean: 2%
- Family Friendly: 2%
- Great Location / Easy to get to: 1%
- Safe: 1%
- Shopping: 0%

Feelings in St. Pete-Clearwater Area (Unaided)

- Calm / Relaxed: 51%
- Happy: 22%
- Amazing: 10%
- Energized / Excited: 7%
- Fine / Good: 4%
- Entertained: 3%
- Refreshed / Healthy: 2%
- Comfortable: 2%
- Safe: 1%
- Warm: 1%

Base: 2021 - May 462 responses.
Attractions or Services that Would Enhance the Destination Experience

Additional Attractions or Services (Unaided)

- It needs no improvement: 82%
- Cheaper & More Parking: 6%
- Less congestion / traffic: 4%
- More Affordable: 2%
- Better Nightlife: 1%
- More Public Transportation: 1%
- More public restrooms: 1%
- Better Signage / accessibility: 1%
- Restaurant Diversity: 0%
- Tourist Information: 0%
- Clean it up: 0%
- Bars and food options on the...: 0%
- More shaded / green areas: 0%
- Finish the Pier: 0%
- More Shopping: 0%

Base: 2021 - May 462 responses.
When Decision to Visit was Made / Travel Planning Resources Used

Average Time Between Decision to Visit and Arrival

- 57 Days in Advance

Resources Used before Arrival and While In Market

- BEFORE ARRIVING
- WHILE IN ST. PETE/CLEARWATER AREA

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

Base: 2021 - May 462 responses.
Experience Satisfaction / Earned & Paid Media Recall

Overall Satisfaction

- Very satisfied: 90%
- Satisfied: 10%
- Neutral—neither satisfied nor unsatisfied: 0%
- Unsatisfied: 0%
- Very unsatisfied: 0%

Base: 2021 - May 462 responses.

Media Recall

- Yes: 43%
- No: 53%
- Maybe/Not sure: 5%
Likelihood to Recommend / Likelihood to Return

Likelihood to Recommend: 9.7 / 10
Likelihood to Return: 9.6 / 10

Base: 2021 - May 462 responses.
Demographics

- **Gender**
  - Female: 73%
  - Male: 27%
  - Other: 0%
  - I prefer not to answer: 8%

- **Race/Ethnicity**
  - Caucasian: 83%
  - Latino/Hispanic: 6%
  - Black/African-American: 5%
  - Asian/Pacific Islander: 5%
  - American Indian/Alaska Native: 5%
  - Other: 2%
  - I prefer not to answer: 3%

- **Marital Status**
  - Single: 29%
  - Single with children under 18: 2%
  - Married/partnered: 47%
  - Married/partnered with children under 18: 18%
  - Other: 4%
  - I prefer not to answer: 4%

- **Sexuality**
  - Heterosexual: 95%
  - LGBTQ: 4%
  - Other: 2%
  - I prefer not to answer: 3%

Base: 2021 - May 462 responses.

Average Age: 46.5
Average Income: $108,539
Visit St. Pete Clearwater
Visitor Profile Study
Infographic Profile: 2021 - May 462 responses.
Infographic Profile: 2021 - May 462 responses.

Domestic vs. International

United States Resident: 99.3%
International Visitor: 0.7%

Factors Important to Destination Decision

- Beaches that suit my tastes: 35.3%
- Overall ambiance & atmosphere: 21.6%
- Scenic beauty: 21.1%
- Easy to get to: 20.4%
- Friends or family in the area: 20.2%
- Weather: 19.1%
Infographic Profile: 2021 - May 462 responses.

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

**Seasonality of Visit**
- Jan-Mar: 0.0%
- Apr-Jun: 100.0%
- Jul-Sept: 0.0%
- Oct-Dec: 0.0%

**Travel Party Size**
- 2.5 People
- 19.2% Traveled with Children

**Daily Spending**
- $255.19 Per Person

**Top Communities Visited**
- St. Petersburg: 47.9%
- Clearwater Beach: 43.6%
- Madeira Beach: 30.9%
- St. Pete Beach: 29.2%
- Treasure Island: 19.9%

**Top Activities**
- Dining in restaurants: 88.1%
- Visit the beach: 54.3%
- Shopping: 48.2%
- Swimming: 36.1%