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 417 for October 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
### Point of Origin

#### Country of Origin
- United States: 99%
- Canada: 0%
- Mexico: 0%
- United Kingdom: 0%
- Germany: 0%
- France: 0%
- China: 0%
- Other: 1%

#### State of Origin
- Florida: 44%
- Ohio: 8%
- Indiana: 6%
- Illinois: 4%
- New York: 4%
- Wisconsin: 3%
- Virginia: 3%
- Texas: 3%
- Michigan: 2%
- Pennsylvania: 2%
- Tennessee: 2%
- California: 2%

#### MSA of Origin
- Tampa, FL: 20%
- Sarasota-Bradenton, FL: 7%
- Orlando, FL: 7%
- Chicago, IL: 4%
- Indianapolis, IN: 3%
- Lakeland-Winter Haven, FL: 3%
- Miami, FL: 2%
- Dayton-Springfield, OH: 2%
- Cleveland, OH: 2%
- Jacksonville, FL: 1%
- New York, NY-NJ: 1%
- Gary-Hammond-East Chicago, IN: 1%

Base: 2021 - October 417 responses.
Lodging Type / Daily Spending in Market

### Lodging Type
- Hotel, resort or motel in SPC: 23%
- Home share rental in the SPC: 6%
- Condo/vacation home in the SPC: 9%
- Private residence in SPC: 1%
- Day trip: 61%

### Daily Spending
- Hotel/motel/inn/lodging: $105
- Restaurants: $104
- Retail store purchases: $39
- Other Entertainment & sightseeing: $22
- Car rental (in area only): $12
- Gas, parking and local transportation: $11
- Other: $1

**Mean Travel Party Spending = $294**
**Avg # of People Covered by Spending = 2**
**Mean Spending Per Person = $132**

Base: 2021 - October 417 responses.
Days & Nights in St. Pete/Clearwater

Days in Market

<table>
<thead>
<tr>
<th>Days in Market</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 or more</td>
<td>2%</td>
</tr>
<tr>
<td>9</td>
<td>0%</td>
</tr>
<tr>
<td>8</td>
<td>4%</td>
</tr>
<tr>
<td>7</td>
<td>11%</td>
</tr>
<tr>
<td>6</td>
<td>6%</td>
</tr>
<tr>
<td>5</td>
<td>8%</td>
</tr>
<tr>
<td>4</td>
<td>6%</td>
</tr>
<tr>
<td>3</td>
<td>11%</td>
</tr>
<tr>
<td>2</td>
<td>5%</td>
</tr>
<tr>
<td>1</td>
<td>49%</td>
</tr>
</tbody>
</table>

Mean Days

(≤ 30) = 3
(> 30) = 3

Nights in Market

<table>
<thead>
<tr>
<th>Nights in Market</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 or more</td>
<td>1%</td>
</tr>
<tr>
<td>9</td>
<td>0%</td>
</tr>
<tr>
<td>8</td>
<td>1%</td>
</tr>
<tr>
<td>7</td>
<td>4%</td>
</tr>
<tr>
<td>6</td>
<td>10%</td>
</tr>
<tr>
<td>5</td>
<td>7%</td>
</tr>
<tr>
<td>4</td>
<td>7%</td>
</tr>
<tr>
<td>3</td>
<td>6%</td>
</tr>
<tr>
<td>2</td>
<td>10%</td>
</tr>
<tr>
<td>1</td>
<td>4%</td>
</tr>
<tr>
<td>0</td>
<td>49%</td>
</tr>
</tbody>
</table>

Mean Nights

(≤ 30) = 2
(> 30) = 2

Base: 2021 - October 417 responses.
Primary Reason for Visit / Other Destinations Visited

**Primary Reason for Visit**

- Vacation: 56%
- Visit friends or family in the area: 13%
- Weekend getaway: 11%
- Other personal reasons: 10%
- Wedding: 3%
- Attend special event, exhibition or concert: 2%
- Conference/tradeshow or other group meeting: 2%
- Business: 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: 34%
- Sarasota Area: 15%
- Orlando/Disney: 5%
- Ocala/Gainesville: 3%
- Crystal River: 2%
- Miami: 2%
- Ft. Lauderdale/Palm Beach: 2%
- Ft. Myers/SW Florida: 2%
- Lakeland/Winter Haven: 2%
- Jax/St. Augustine: 1%
- Daytona: 1%
- Florida Keys: 1%
- Everglades: 0%
- Kennedy/Space…: 0%
- Sebring: 0%
- Panhandle: 0%
- Tallahassee: 0%
- NONE—The St…: 39%

Base: 2021 - October 417 responses.
Method of Arrival / Arrival Airport & Airline

Method of Arrival

- Personal vehicle: 60%
- Airline: 40%
- Rental vehicle: 4%
- Rideshare (Uber, Lyft, etc.): 1%
- Tour bus: 1%
- RV: 0%
- Train: 0%
- Public bus: 0%
- Taxi or limo: 0%
- Other: 1%

Method of Departure

- Personal vehicle: 61%
- Airline: 32%
- Rental vehicle: 4%
- Tour bus: 1%
- Rideshare (Uber, Lyft, etc.): 0%
- RV: 0%
- Train: 0%
- Public bus: 0%
- Taxi or limo: 0%
- Other: 1%

Base: 2021 - October 417 responses.
Method of Arrival / Arrival Airport & Airline

Airport of Arrival

- Tampa Int'l.: 70%
- St. Pete-Clearwater Int'l.: 18%
- Orlando Int'l.: 7%
- Sarasota/Bradenton Int'l.: 2%
- Miami Int'l.: 1%
- SW Fl Int'l. (Ft. Myers): 1%
- Sanford Int'l.: 1%
- Jacksonville Int'l.: 1%
- Ft. Lauderdale Int'l.: 0%
- Palm Beach Int'l.: 0%
- Other: 0%

Airline Used by Airport of Arrival

<table>
<thead>
<tr>
<th>Airport</th>
<th>Southwest</th>
<th>Allegiant</th>
<th>American Airlines</th>
<th>Delta Airlines</th>
<th>United</th>
<th>Jet Blue</th>
<th>Sun Country</th>
<th>Alaska Airlines</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tampa Int'l.</td>
<td>35.7%</td>
<td>1.7%</td>
<td>18.6%</td>
<td>17.8%</td>
<td>15.0%</td>
<td>1.0%</td>
<td>1.1%</td>
<td>0.1%</td>
<td>9.1%</td>
</tr>
<tr>
<td>St. Pete-Clearwater Int'l</td>
<td>2.1%</td>
<td>87.3%</td>
<td>7.5%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>3.1%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

Base: 2021 - October 417 responses.
Rental Vehicle Pick-Up City / Transportation Used In-Market

### Rental Vehicle Pick-Up City

- **Tampa**: 74%
- **St. Petersburg/ Clearwater area**: 11%
- **Orlando**: 9%
- **Sarasota/Bradenton**: 3%
- **Miami**: 1%
- **Jacksonville**: 1%
- **Sanford**: 1%
- **Ft. Myers**: 0%
- **Fort Lauderdale**: 0%
- **West Palm Beach**: 0%
- **Outside of Florida**: 0%

### Transportation Used In-Market

- **Personal vehicle**: 68%
- **Rental vehicle**: 28%
- **Uber, Lyft, etc.**: 1%
- **Public bus**: 1%
- **Free Beach Rides**: 1%
- **Tour bus**: 1%
- **Boat**: 0%
- **RV**: 0%
- **Taxi or limo**: 0%
- **Bicycle**: 0%
- **Motorcycle**: 0%

*Base: 2021 - October 417 responses.*
Travel Party Composition / Travel Party Size

Travel Party Composition

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Solo</td>
<td>15%</td>
</tr>
<tr>
<td>Couple</td>
<td>57%</td>
</tr>
<tr>
<td>Immediate Family</td>
<td>21%</td>
</tr>
<tr>
<td>Extended Family</td>
<td>0%</td>
</tr>
<tr>
<td>Group of Couples</td>
<td>0%</td>
</tr>
<tr>
<td>Group of Friends</td>
<td>12%</td>
</tr>
<tr>
<td>Tour Group</td>
<td>0%</td>
</tr>
<tr>
<td>Business Associates</td>
<td>0%</td>
</tr>
<tr>
<td>Other</td>
<td>0%</td>
</tr>
</tbody>
</table>

Travel Party Size

<table>
<thead>
<tr>
<th>Category</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female adults (18 yrs. +)</td>
<td>1</td>
</tr>
<tr>
<td>Male adults (18 yrs. +)</td>
<td>1</td>
</tr>
<tr>
<td>Female children (0 to 17 yrs.)</td>
<td>0</td>
</tr>
<tr>
<td>Male children (0 to 17 yrs.)</td>
<td>0</td>
</tr>
</tbody>
</table>

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

Base: 2021 - October 417 responses.
Important Factors to Destination Decision / Trip Activities

**Important to Decision to Visit**

- Easy to get to: 37%
- Overall ambiance & atmosphere: 37%
- Weather: 32%
- Restaurants, cuisine, food scene: 27%
- Recommendation from people I trust: 24%
- Beaches that suit my tastes: 24%
- Scenic beauty: 20%
- Arts & cultural offerings: 18%
- Friends or family in the area: 17%
- Shopping opportunities: 13%
- Outdoor recreational opportunities: 9%
- The SPC area is romantic: 7%
- Attractions in the area: 4%
- St. Pete Pier: 4%
- A specific attraction: 3%

**Trip Activities**

- Dining in restaurants: 87%
- Visit the beach: 61%
- Shopping: 54%
- Swimming: 43%
- Visit museums: 27%
- Guided tour: 17%
- Visit friends or family: 15%
- Bars/Nightlife: 14%
- Photography: 12%
- Other boating: 6%
- Shelling: 5%
- Fishing: 5%
- Take a dining cruise: 5%
- Jet skiing: 5%
- Bird watching: 4%

Base: 2021 - October 417 responses.
First-Time Visit to Florida / Previous Visitation to St. Pete/Clearwater

First Time Visitors to Florida
- Yes: 7%
- No: 93%

Previous Visitation to the St. Pete/Clearwater Area
- First Time Visitor: 23%
- 1 - 10 Previous Visits: 58%
- 11 - 20 Previous Visits: 9%
- More than 20 Visits: 10%

Mean # of Past Trips = 7

Base: 2021 - October 417 responses.
Attractions Visited / Communities Visited

Attractions Visited

- Dali Art Museum: 18%
- St. Pete Pier: 13%
- Chihuly Exhibit: 10%
- Clearwater Marine Aquarium: 4%
- Tarpon Springs: 3%
- Orlando area Theme Parks: 2%
- Busch Gardens: 1%
- Sunken Gardens: 1%
- Caladesi Island: 0%
- Adventure Island: 0%
- Other: 4%
- NONE OF THESE: 60%

Communities Visited

- St. Petersburg: 41%
- Clearwater Beach: 38%
- Madeira Beach: 35%
- Treasure Island: 14%
- St. Pete Beach: 13%
- Clearwater: 7%
- Indian Shores & Indian Rocks Beach: 6%
- North Redington Beach/Redington Shores: 6%
- Dunedin: 5%
- Tarpon Springs: 5%
- Seminole: 3%
- Gulfport: 2%
- Largo: 2%
- Pass-A-Grille Beach: 1%
- Palm Harbor: 1%

Base: 2021 - October 417 responses.
Most Liked Aspects of SPC (Unaided)

- Everything: 46%
- Beaches / Ocean: 44%
- Scenic Beauty: 20%
- Food / Restaurants & Bars: 16%
- Tropical Climate / Warm Weather: 15%
- Clean: 14%
- Friendly People: 14%
- Shopping: 13%
- Relaxing Atmosphere / Ambiance: 12%
- Safe: 11%
- Entertainment / Variety of Fun: 10%
- Great Location / Easy to get to: 7%
- Accessible / Convenient / Walkable: 6%
- Family Friendly: 4%
- Attractions (Museums, Aquarium, etc.): 3%

Feelings in SPC Area (Unaided)

- Calm / Relaxed: 64%
- Happy: 30%
- Safe: 10%
- Amazing: 8%
- Comfortable: 8%
- Energized / Excited: 7%
- Refreshed / Healthy: 6%
- Fine / Good: 5%
- Entertained: 4%
- Welcomed: 3%

Base: 2021 - October 417 responses.
**Attractions or Services that Would Enhance the Destination Experience**

**Additional Attractions or Services (Unaided)**

- **It needs no improvement**: 87%
- **Cheaper & More Parking**: 8%
- **Less congestion / traffic**: 1%
- **More public restrooms**: 1%
- **Better Signage /accessibility**: 1%
- **More Public Transportation Options**: 1%
- **Better Nightlife**: 1%
- **More Affordable**: 0%
- **More Shopping**: 0%
- **Restaurant Diversity**: 0%
- **Tourist Information**: 0%
- **Finish the Pier**: 0%
- **Bars and food options on the beach**: 0%
- **More shaded / green areas**: 0%
- **More kid friendly activities**: 0%

*Base: 2021 - October 417 responses.*
When Decision to Visit was Made / Travel Planning Resources Used

Average Time Between Decision to Visit and Arrival

55 Days in Advance

Resources Used before Arrival and While In Market

- **Before Arriving**
  - Social Media content: 52%
  - User-generated content/Review websites, such as Yelp: 40%
  - Official St. Petersburg/Clearwater area tourism website: 28%
  - Online travel agencies (Expedia, Travelocity, etc.): 38%
  - Opinions of friends or relatives: 25%
  - Travel guides, brochures: 12%
  - Television programming: 11%
  - Radio programming: 7%
  - Newspaper travel section: 6%
  - Travel agency (traditional, offline): 5%
  - Lifestyle or travel magazines: 1%
  - Gulf to Bay St. Pete/Clearwater Destination Magazine: 1%
  - YouTube or other online videos: 0%

- **While in St. Pete/Clearwater Area**
  - Social Media content: 52%
  - User-generated content/Review websites, such as Yelp: 41%
  - Official St. Petersburg/Clearwater area tourism website: 38%
  - Online travel agencies (Expedia, Travelocity, etc.): 28%
  - Opinions of friends or relatives: 25%
  - Travel guides, brochures: 11%
  - Television programming: 7%
  - Radio programming: 1%
  - Newspaper travel section: 1%
  - Travel agency (traditional, offline): 1%
  - Lifestyle or travel magazines: 1%
  - Gulf to Bay St. Pete/Clearwater Destination Magazine: 0%
  - YouTube or other online videos: 0%

Base: 2021 - October 417 responses.
Experience Satisfaction / Earned & Paid Media Recall

Overall Satisfaction

- Very satisfied: 96%
- Satisfied: 3%
- Neutral—neither satisfied nor unsatisfied: 1%
- Unsatisfied: 0%
- Very unsatisfied: 0%

Media Recall

- Yes: 31%
- No: 67%
- Maybe/Not sure: 2%

Base: 2021 – October 417 responses.
Likelihood to Recommend / Likelihood to Return

Likelihood to Recommend

9.9 / 10

Likelihood to Return

9.8 / 10

Base: 2021 - October 417 responses.

Destination Analysts
Demographics

- **Gender Distribution:**
  - Female: 74%
  - Male: 25%
  - Other: 0%
  - I prefer not to answer: 0%

- **Age Distribution:**
  - Average Age: 47.1

- **Income Distribution:**
  - Average Income: $109,183

- **Race and Ethnicity Distribution:**
  - Caucasian: 85%
  - Latino/Hispanic: 6%
  - Black/African-American: 5%
  - Asian/Pacific Islander: 1%
  - American Indian/Alaska Native: 1%
  - Other: 0%
  - I prefer not to answer: 2%

- **Marital Status Distribution:**
  - Single: 26%
  - Single with children under 18: 11%
  - Married/partnered: 55%
  - Married/partnered with children under 18: 5%
  - Other: 1%
  - I prefer not to answer: 1%

- **Sexual Orientation Distribution:**
  - Heterosexual: 84%
  - LGBTQ: 5%
  - Other: 10%
  - I prefer not to answer: 2%

**Base:** 2021 - October 417 responses.
Visit St. Pete Clearwater
Visitor Profile Study
Infographic Profile: 2021 - October 417 responses.
Infographic Profile: 2021 - October 417 responses.

- **15.4%** Millennials
- **50.2%** Gen X
- **20.9%** Baby Boomers

### Domestic vs. International
- **United States Resident**: 99%
- **International Visitor**: 1%

### Point of Origin: Top States
- **Florida**: 44%
- **Ohio**: 8%
- **Indiana**: 6%

### Factors Important to Destination Decision
- **Easy to get to**: 37%
- **Overall ambiance & atmosphere**: 37%
- **Weather**: 32%
- **Restaurants, cuisine, food scene**: 27%
- **Recommendation from people I know**: 24%
- **Beaches that suit my tastes**: 24%
Infographic Profile: 2021 - October 417 responses.

Length of Stay
2.9 Days (on average)

Seasonality of Visit

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

Travel Party Size
2.3 People
14.1% Traveled with Children

Daily Spending
$131.58 Per Person

Top Communities Visited

- Madeira Beach: 45%
- Clearwater Beach: 44%
- St. Petersburg: 41%
- Treasure Island: 23%
- St. Pete Beach: 18%

Top Activities

- Dining in restaurants: 87%
- Visit the beach: 61%
- Shopping: 54%
- Swimming: 43%