Visit St. Petersburg/Clearwater
2017/18 VISITOR PROFILE

Report of Findings
November 2017
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Overview & Methodology

This report presents interim monthly findings of a comprehensive visitor profile development study conducted by Destination Analysts, Inc. on behalf of Visit St. Petersburg/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 preliminary report presents the top-line survey data collected from these surveys in November 2017. Note that data presented in this interim report is unweighted. Once more data has been collected, we will develop appropriate weighting techniques so the final statistics emerging from the project will accurately reflect the overall population of St. Pete/Clearwater area visitors.

In total, 428 completed surveys from Pinellas County visitors were collected.
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. tripographic information like the reason for visiting the area, length of stay, place of stay, etc.)
• Travel party composition
• Activities & attractions visited in the St. Petersburg/Clearwater area
• Evaluation of St. Petersburg/Clearwater brand attributes
• Detailed visitor spending estimates
• Travel planning resources used by St. Petersburg/Clearwater area visitors
• Visitor satisfaction
• Visitor demographics

Destination Analysts’ research staff at PIE airport.
Visitor Intercept Overview

Destination Analysts’ survey team worked at locations around the St. Petersburg/Clearwater area 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
- Clearwater Marine Aquarium
- John’s Pass Village & Boardwalk
- Seminole City Center
- Shephard’s Resort
- St. Petersburg-Clearwater International Airport
- St. Petersburg Saturday Morning Market
- Straub Park
- Sundial St. Pete
- The Dali Museum
- Wyndham Grand Clearwater Beach

Destination Analysts’ research staff interviewing visitors at the St. Petersburg Saturday Morning Market.
VISITOR TRIP DETAILS
In November 2017, a large majority of visitors came to the St. Pete/Clearwater area primarily for leisure. Six-in-ten visitors characterized the purpose of their trip as a “vacation” (59.5%).

Just under half of visitors surveyed in November 2017 stayed overnight in a St. Pete/Clearwater area hotel, resort or motel during their trip (47.9%). This is down slightly compared to findings in October at 51.4 percent.

Question: What is your primary reason for visiting the St. Pete/Clearwater Area? (Select one)
Base: All Respondents. 405 responses.

Question: Where are you staying overnight on this trip to the St. Pete/Clearwater area? (Select one)
Base: All Respondents. 428 responses.
The average St. Pete/Clearwater area visitor surveyed in November 2017 stayed 7.2 days and 6.6 nights in the destination. This is up from findings in October at 6.0 days and 5.3 nights, on average.

**Chart: Days in Market**

- 10 or more: 15.5%
- 9: 2.1%
- 8: 11.0%
- 7: 12.6%
- 6: 7.3%
- 5: 12.9%
- 4: 9.2%
- 3: 3.7%
- 2: 9.2%
- 1: 0.6%

Mean Days = 7.2

**Chart: Nights in Market**

- 10 or more: 11.9%
- 9: 3.8%
- 8: 2.3%
- 7: 12.2%
- 6: 14.0%
- 5: 8.1%
- 4: 13.4%
- 3: 18.6%
- 2: 10.5%
- 1: 4.7%
- 0: 0.6%

Mean Nights = 6.6

**Question:** How many total days and nights did you, or will you, stay in the St. Petersburg/Clearwater area on this trip?

**Base:** All Respondents. 381 responses.
November visitors primarily arrived and departed from the St. Pete/Clearwater area by car, using either a personal vehicle (38.3% and 36.3%, respectively) or rental vehicle (33.1% and 30.0%, respectively). Nearly half arrived by airline (48.4%).

Chart: Method of Arrival and Departure

Visitors who arrived into the area by airline primarily flew into the PIE airport (48.1%) or the Tampa International Airport (41.7%).

Chart: Airport of Arrival

Question: How did you arrive into the St. Pete/Clearwater area and how will you leave? (Select all that apply) Base: All Respondents. 426 responses.

Question: At which airport did you arrive into the area? (Select one)? Base: Respondents who arrived by Airline. 206 responses.
Visitors who arrived into the St. Pete/Clearwater area by rental car primarily rented their vehicle in nearby Tampa (54.0%). 28.3 percent of this group rented their car in the St. Pete/Clearwater area.

Driving a rental (44.8%) or personal vehicle (44.3%) was the most utilized form of transportation in the area amongst visitors surveyed. 14.8 percent also used a ride-sharing service such as Uber or Lyft during their trip.

**Chart: Rental Vehicle Pick-Up City**

- Tampa: 54.0%
- St. Petersburg/Clearwater area: 28.3%
- Orlando: 12.8%
- Miami: 1.6%
- Fort Lauderdale: 1.1%
- Ft. Myers: 1.1%
- Outside of Florida: 0.5%
- Sanford: 0.5%

**Chart: Transportation Used In-Market**

- Rental vehicle: 44.8%
- Personal vehicle: 44.3%
- Uber, Lyft, etc.: 14.8%
- Free Beach Rides: 9.7%
- Public bus: 4.6%
- Boat: 3.1%
- Taxi or limo: 1.9%
- Bicycle: 1.5%
- Tour bus: 0.7%
- Motorcycle: 0.7%
- RV: 0.0%

**Question:** In which city did you rent your rental vehicle? (Select one)
Base: Respondents who arrived in the area by rental car. 187 responses.

**Question:** Which modes of transportation did you, or will you, use while in the St. Petersburg/Clearwater area? (Select all that apply)
Base: All Respondents. 413 responses.
Half of visitors surveyed in November were traveling with one other person (51.8%) while 33.5 percent were traveling with their immediate family. 8.7 percent of visitors were traveling alone on their trip to the St. Pete/Clearwater area.

The typical travel group to the St. Pete/Clearwater area was comprised of 6.0 people. In total, 16.2 percent of travel groups surveyed included children under age 18.

Question: Which best describes your travel group on this trip? Are you…? (Select all that apply)
Base: All Respondents. 427 responses.

Chart: Travel Party Composition

<table>
<thead>
<tr>
<th>Group Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Solo</td>
<td>8.7%</td>
</tr>
<tr>
<td>Couple</td>
<td>51.8%</td>
</tr>
<tr>
<td>Immediate Family</td>
<td>33.5%</td>
</tr>
<tr>
<td>Extended Family</td>
<td>2.6%</td>
</tr>
<tr>
<td>Group of Couples</td>
<td>2.8%</td>
</tr>
<tr>
<td>Group of Friends</td>
<td>8.0%</td>
</tr>
<tr>
<td>Tour Group</td>
<td>0.5%</td>
</tr>
<tr>
<td>Business Associates</td>
<td>1.6%</td>
</tr>
</tbody>
</table>

Chart: Travel Party Size

<table>
<thead>
<tr>
<th>Demographic</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male adults (18 yrs. +)</td>
<td>1.3</td>
</tr>
<tr>
<td>Female adults (18 yrs. +)</td>
<td>1.5</td>
</tr>
<tr>
<td>Male children (0 to 17 yrs.)</td>
<td>1.3</td>
</tr>
<tr>
<td>Female children (0 to 17 yrs.)</td>
<td>1.4</td>
</tr>
<tr>
<td>Average Travel Party Size</td>
<td>5.5</td>
</tr>
<tr>
<td>Percent with children in party</td>
<td>16.2%</td>
</tr>
</tbody>
</table>

Question: How many people of each type are in your immediate travel party, including yourself?
Base: All Respondents. 426 responses.
Important Factors to Destination Decision

Beaches that suit travelers’ tastes (51.7%) and good weather (45.9%—up from 24.3% in October) were the most common factors motivating visitors to take a trip to the St. Pete/Clearwater area in November. Beyond beaches and weather, respondents were also inspired to visit because of friends or family in the area (31.8%—up from 16.0% in October), the overall ambiance and atmosphere of the destination (25.1%) and/or restaurants (17.9%).

Question: Which of the following were IMPORTANT to your decision to take this trip to St. Petersburg/Clearwater area? (Select all that apply) Base: All Respondents. 418 responses.
Trip Activities

Similar to findings in October, November visitors most commonly dined in restaurants, went to the beach and shopped while in the St. Pete/Clearwater area. Survey respondents were presented with a list of activities and asked which they had participated in during their time in the area. Of the activities tested, dining in restaurants (79.0%) and going to the beach (72.9%) were the top activities visitors participated in while in the destination. These were followed by shopping (54.9%), bars/nightlife (30.1%), swimming (25.0%) and visiting friends or family in the area (20.1%).

Question: Which of these activities did you, or will you, participate in while in the St. Pete/Clearwater area? (Select all that apply) Base: All Respondents. 428 responses.
A majority of St. Pete/Clearwater visitors surveyed in November had visited Florida before; 7.7 percent were on their first visit to the state.

**Chart: First Time Visitors to Florida**

Yes, 7.7%

No, 92.3%

**Question:** Is this your first visit to Florida?  
**Base:** All Respondents. 427 responses.

In total, 23.8 percent of visitors surveyed in November were first-time visitors to the St. Pete/Clearwater area. The average visitor in November had taken 9.6 trips to the area previously.

**Chart: Previous Visitation to the St. Pete/Clearwater Area**

- First-time Visitors, 23.8%
- More than 10 visits, 30.2%
- 1-10 Previous Visits, 46.1%

**Mean # of past trips = 9.6**

**Question:** Prior to this visit, how many times have you been to the St. Petersburg/Clearwater area?  
**Base:** All Respondents. 421 responses.
The Dali Art Museum and Tarpon Springs were the top attractions visited amongst visitors surveyed in November.

Question: Which of these attractions did you (or will you) visit while on this trip? (Select all that apply) Base: All Respondents. 425 responses.

Chart: Attractions Visited

- Dali Art Museum: 10.1%
- Tarpon Springs: 6.6%
- Orlando area Theme Parks: 5.6%
- Clearwater Marine Aquarium: 5.6%
- Busch Gardens: 3.3%
- Ft. Desoto Park: 2.8%
- Kennedy Space Center: 1.2%
- Florida Aquarium in Tampa: 1.2%
- Florida Botanical Gardens: 0.7%
- Caladesi Island: 0.7%
- Tampa Bay Rays game/Tropicana Field: 0.2%
- Heritage Village: 0.2%
- Brooker Creek Preserve: 0.2%
- Adventure Island: 0.2%
- Weedon Island Preserve: 0.0%
- Sunken Gardens: 0.0%
- Other: 2.1%
- NONE OF THESE: 67.1%

Of the 19 communities tested, half of visitors surveyed went to Clearwater Beach. In addition, 45.6 percent visited Madeira Beach and 35.5 percent visited Treasure Island.

Chart: Communities Visited

- Clearwater Beach: 50.0%
- Madeira Beach: 35.6%
- Treasure Island: 29.2%
- St. Petersburg: 25.9%
- St. Pete Beach: 14.3%
- Indian Shores & Indian Rocks Beach: 8.9%
- Tarpon Springs: 5.6%
- Dunedin: 4.9%
- Pass-A-Grille Beach: 4.7%
- Largo: 4.7%
- North Redington Beach/Redington Shores: 4.0%
- Gulfport: 3.3%
- Palm Harbor: 3.0%
- Seminole: 2.1%
- Pinellas Park: 1.9%
- Safety Harbor: 0.9%
- Oldsmar: 0.7%
- Tierra Verde: 0.2%
- Tierra Verde: 0.2%

Question: Which of the following communities in the St. Pete/Clearwater area did you visit? (Show list. Select all that apply) Base: All Respondents. 428 responses.
Tampa, Sarasota and Orlando were the top Florida destinations respondents visited as part of their St. Pete/Clearwater trip. A majority of visitors however reported that the St. Pete/Clearwater area was the only destination visited on their trip (70.6%).

Visiting travel parties spent an average of $320.65 in the St. Pete/Clearwater area per trip day in November.

Question: Which of these other destinations did you visit while on this trip? (Show list. Select all that apply) Base: All Respondents. 428 responses.

<table>
<thead>
<tr>
<th>Destination</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tampa</td>
<td>14.3%</td>
</tr>
<tr>
<td>Sarasota Area</td>
<td>6.3%</td>
</tr>
<tr>
<td>Orlando/Disney</td>
<td>6.3%</td>
</tr>
<tr>
<td>Florida Keys</td>
<td>1.4%</td>
</tr>
<tr>
<td>Miami</td>
<td>1.2%</td>
</tr>
<tr>
<td>Kennedy/Space Coast/Cocoa/Melbourne</td>
<td>1.2%</td>
</tr>
<tr>
<td>Ft. Myers/SW Florida</td>
<td>1.2%</td>
</tr>
<tr>
<td>Ft. Lauderdale/Palm Beach</td>
<td>0.9%</td>
</tr>
<tr>
<td>Jax/St. Augustine</td>
<td>0.7%</td>
</tr>
<tr>
<td>Daytona</td>
<td>0.7%</td>
</tr>
<tr>
<td>Everglades</td>
<td>0.5%</td>
</tr>
<tr>
<td>Crystal River</td>
<td>0.5%</td>
</tr>
<tr>
<td>Panhandle</td>
<td>0.2%</td>
</tr>
<tr>
<td>Tallahassee</td>
<td>0.0%</td>
</tr>
<tr>
<td>Sebring</td>
<td>0.0%</td>
</tr>
<tr>
<td>Ocala/Gainesville</td>
<td>0.0%</td>
</tr>
<tr>
<td>Lakeland/Winter Haven</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

NONE—SPC was my only destination on this trip 70.6%
Most Liked Aspect / Feelings in St. Pete-Clearwater

The St. Pete/Clearwater area’s beaches, ocean and tropical climate were the most liked aspects of the destination amongst visitors surveyed.

Visitors most often felt calm/relaxed and happy while they were in the destination.

**Question:** What do you like most about the St. Petersburg/Clearwater area?  
Base: All Respondents. 405 responses.

**Chart: Most Liked Aspects of St. Pete/Clearwater (Unaided)**

- The Beaches & Ocean: 35.3%
- Tropical Climate: 23.7%
- Friendly People: 7.9%
- Relaxed yet Modern Atmosphere: 7.7%
- Scenic Beauty: 5.4%
- Variety of Fun Activities: 4.0%
- Family Friendly: 3.0%
- Accessible & Convenient: 2.7%
- Restaurants and Bars: 2.5%
- Tourist Attractions (museum, aquarium): 2.5%
- Clean: 2.5%
- Everything: 1.2%
- Shopping: 1.0%
- Location: 0.7%

**Chart: Feelings in St. Pete/Clearwater Area (Unaided)**

- Calm/Relaxed: 49.2%
- Happy: 21.4%
- Amazing: 12.3%
- Comfortable: 6.0%
- Fine/Good: 4.3%
- Energized/Excited: 2.7%
- Welcomed: 1.7%
- Refreshed: 1.2%
- Safe: 0.7%
- Negative feelings: 0.5%

**Question:** What one word or phrase best describes how you feel in the St. Petersburg/Clearwater area?  
Base: Respondents. 415 responses.
A majority of visitors surveyed feel the St. Pete/Clearwater area does not need any additional attractions or services to enhance the visitor experience.

Chart: Additional Attractions or Services (Unaided)

- It needs no improvement: 69.9%
- More Public Transportation Options: 3.9%
- Tourist Information: 2.9%
- Restaurant Diversity: 2.5%
- More public restrooms: 1.4%
- More Cultural Activities: 1.1%
- More Shopping: 0.7%
- Finish the Pier: 0.7%
- Clean it up: 0.4%

Question: In your opinion, what services or additional attractions would most enhance your experience in the St. Petersburg/Clearwater Area?
Base: All Respondents. 279 responses.
TRAVEL PLANNING AND SATISFACTION METRICS
On average, respondents made the decision to visit the St. Pete/Clearwater area 133.7 days (4.5 months) in advance of their trip.

The most utilized trip planning resource prior to arrival was online travel agencies (45.1%) while the most utilized in-market was user-generated content/reviews websites (25.0%).

<table>
<thead>
<tr>
<th>Chart: Average Time Between Decision to Visit and Arrival</th>
</tr>
</thead>
<tbody>
<tr>
<td>133.7 Days In advance</td>
</tr>
</tbody>
</table>

| Question: Approximately how many days before you arrived did you make the decision to visit the St. Petersburg/Clearwater area for this trip? Base: All Respondents. 421 responses. |

<table>
<thead>
<tr>
<th>Chart: Resources Used before Arrival and While In Market</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Resource</th>
<th>Used Before Arrival</th>
<th>Used In Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online travel agencies (Expedia, Travelocity, etc.)</td>
<td>45.1%</td>
<td>2.8%</td>
</tr>
<tr>
<td>User-generated content/Review websites, such as Yelp and TripAdvisor</td>
<td>40.0%</td>
<td>25.0%</td>
</tr>
<tr>
<td>Opinions of friends or relatives</td>
<td>17.3%</td>
<td>14.5%</td>
</tr>
<tr>
<td>Social Media content</td>
<td>16.1%</td>
<td>18.0%</td>
</tr>
<tr>
<td>Official St. Petersburg/Clearwater area tourism website, <a href="http://www.VisitStPeteClearwater.com">www.VisitStPeteClearwater.com</a></td>
<td>4.9%</td>
<td>10.0%</td>
</tr>
<tr>
<td>YouTube or other online videos</td>
<td>1.9%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Official Visit St. Pete/Clearwater Destination Magazine</td>
<td>1.6%</td>
<td>1.2%</td>
</tr>
<tr>
<td>Travel guides, brochures</td>
<td>1.6%</td>
<td>13.1%</td>
</tr>
<tr>
<td>Travel agency (traditional, offline)</td>
<td>0.9%</td>
<td>0.2%</td>
</tr>
<tr>
<td>Lifestyle or travel magazines</td>
<td>0.5%</td>
<td>1.9%</td>
</tr>
<tr>
<td>Newspaper travel section</td>
<td>0.5%</td>
<td>0.5%</td>
</tr>
<tr>
<td>Television programming</td>
<td>0.2%</td>
<td>0.5%</td>
</tr>
<tr>
<td>Radio programming</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

| Question: Which of the following resources did you use to plan your trip to the St. Petersburg/Clearwater area BEFORE you arrived and which did you (or do you plan to) use while IN the area for this trip? (Select all that apply.) Base: All Respondents. 428 responses. |
The St. Pete/Clearwater area appears to provide a highly satisfactory experience. Nearly all visitors surveyed (96.7%) said they were “satisfied” (8.9%) or “very satisfied” (87.8%) with their experience in the destination.

Chart: Overall Satisfaction

<table>
<thead>
<tr>
<th>Satisfaction Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very satisfied</td>
<td>87.8%</td>
</tr>
<tr>
<td>Satisfied</td>
<td>8.9%</td>
</tr>
<tr>
<td>Neutral—neither satisfied nor unsatisfied</td>
<td>3.3%</td>
</tr>
<tr>
<td>Unsatisfied</td>
<td>0.0%</td>
</tr>
<tr>
<td>Very unsatisfied</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

In total, 27.6 percent of November visitors surveyed recalled reading, seeing or hearing paid or earned media for the St. Pete/Clearwater area in the past six months (up slightly compared to findings in October at 24.5%).

Chart: Media Recall

- Yes, 27.6%
- Maybe/Not sure, 8.2%
- No, 64.2%

Question: How satisfied are you with your experience in the St. Petersburg/Clearwater area on this trip? (Select one) Base: All Respondents. 427 responses.

Question: In the last six months, have you seen, read, or heard any travel stories, advertising, or promotions for the St. Petersburg/Clearwater area? Base: All Respondents. 427 responses.
Indicative of a highly satisfactory visitor experience, respondents rated their likelihood to recommend the St. Pete/Clearwater area to other travelers as a 9.5 on a 10-point scale, on average.

Further illustrating strong satisfaction with the visitor experience in the St. Pete/Clearwater area, visitors reported a high likelihood to take another trip to the destination in the future—rating their likelihood to return as a 9.2 on a 10-point scale, on average.
DEMOGRAPHIC PROFILE
Demographic Profile

The following presents the demographic profile for all respondents surveyed in October 2017.

- **Mean age**: 52.9
- **Mean household income**: $92,043
- **Ethnicity**
  - Caucasian: 86.1%
  - Latino/Hispanic: 4.0%
  - Black/African-American: 2.8%
  - Asian/Pacific Islander: 0.7%
- **Gender**
  - Female: 47.7%
  - Male: 44.8%
- **Marital Status**
  - Married/partnered: 71.4%
  - Has children under 18: 9.0%
- **Orientation**
  - Heterosexual: 87.3%
  - LGBTQ: 2.6%
In total, 18.1 percent of survey respondents were international residents with top visitation from the Canada. International visitation was up in November compared to findings in October at 14.6 percent.

The top domestic visitor markets represented in the sample are Tampa (8.7%), Sarasota-Bradenton (7.7%) and Columbus, OH (3.8%).