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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<th>2017</th>
<th>2018</th>
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<td>429</td>
</tr>
</tbody>
</table>
VISIT ST. PETE/CLEARWATER April 2021

**Average Time Between Decision to Visit & Arrival**
- **Apr-18**: 65.0
- **Apr-19**: 63.6
- **Apr-21**: 55.9

**Travel Party Size**
- **Apr-21**: 2.6
- **Apr-18**: 2.7

**Average Days & Nights**
- **Days**
  - **Apr-18**: 2.8
  - **Apr-19**: 3.2
  - **Apr-21**: 3.4
- **Nights**
  - **Apr-18**: 1.9
  - **Apr-19**: 2.3
  - **Apr-21**: 2.4

**Percent Staying Overnight**
- **Apr-18**: 44...
- **Apr-19**: 41...
- **Apr-21**: 35...

**Generations**
- **Boomer or older**
  - **Apr-18**: 50.1%
  - **Apr-19**: 46.8%
  - **Apr-21**: 39.0%

**Average Age**
- **Apr-18**: 49.5
- **Apr-19**: 51.2
- **Apr-21**: 52.1

**Average Income**
- **Apr-21**: $99,996
- **Apr-19**: $99,819
- **Apr-18**: $100,422

**Average Daily Spending**
- **Apr-21**: $269.60
- **Apr-19**: $242.29
- **Apr-18**: $272.25
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
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
**Point of Origin**

**Country of Origin**
- United States: 100%
- Canada: 0%
- United Kingdom: 0%
- Germany: 0%
- France: 0%
- Mexico: 0%
- China: 0%
- Other: 0%

**State of Origin**
- Florida: 37%
- New York: 6%
- Ohio: 6%
- Illinois: 6%
- Michigan: 5%
- Georgia: 4%
- Indiana: 4%
- Massachusetts: 3%
- Virginia: 3%
- North Carolina: 3%
- Wisconsin: 2%
- Texas: 2%

**MSA of Origin**
- Tampa, FL: 22%
- Orlando, FL: 7%
- Sarasota-Bradenton, FL: 5%
- Atlanta, GA: 4%
- Chicago, IL: 4%
- Detroit, MI: 3%
- Washington, DC-MD-VA: 2%
- Indianapolis, IN: 2%
- New York, NY-NJ: 2%
- Greensboro-Winston-Salem-High Point, NC: 2%
- St. Louis, MO-IL: 1%
- Melbourne-Titusville-Palm Bay, FL: 1%

Base: 2021 - April 429 responses.
Lodging Type / Daily Spending in Market

<table>
<thead>
<tr>
<th>Lodging Type</th>
<th>Daily Spending</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel, resort or motel in SPC</td>
<td>$13</td>
</tr>
<tr>
<td>Home share rental in the SPC</td>
<td>$83</td>
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<tr>
<td>Condo/vacation home in the SPC</td>
<td>$38</td>
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<tr>
<td>Private residence in SPC</td>
<td>$35</td>
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<tr>
<td>Day trip</td>
<td>$98</td>
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</tbody>
</table>

Mean Travel Party Spending = $269.49
Avg # of People Covered by Spending = 2.4
Mean Spending Per Person = $114.27

Base: 2021 - April 429 responses.
Days & Nights in St. Pete/Clearwater

**Days in Market**

<table>
<thead>
<tr>
<th>Days</th>
<th>0%</th>
<th>10%</th>
<th>20%</th>
<th>30%</th>
<th>40%</th>
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**Mean Days**

- \( \leq 30 = 2.78 \)
- \( > 30 = 3.41 \)

**Nights in Market**

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**Mean Nights**

- \( \leq 30 = 1.91 \)
- \( > 30 = 2.31 \)

*Base: 2021 - April 429 responses.*
Primary Reason for Visit / Other Destinations Visited

**Primary Reason for Visit**
- Vacation: 50%
- Visit friends or family in the area: 18%
- Attend special event, exhibition or concert: 16%
- Other personal reasons: 12%
- Weekend getaway: 4%
- Business: 1%
- Attend sports event/tournament: 0%
- Wedding: 0%
- Conference/tradeshow or other group meeting: 0%
- On or pre/post a cruise: 0%
- Government business/travel: 0%
- Honeymoon: 0%

**Other Destinations Visited on SPC Trip**
- Tampa: 27%
- Sarasota Area: 13%
- Orlando/Disney: 5%
- Crystal River: 5%
- Ft. Myers/SW Florida: 3%
- Lakeland/Winter Haven: 3%
- Jax/St. Augustine: 2%
- Ocala/Gainesville: 1%
- Ft. Lauderdale/Palm Beach: 1%
- Florida Keys: 1%
- Everglades: 1%
- Miami: 1%
- Daytona: 1%
- Panhandle: 0%
- Kennedy/Space…: 0%
- Sebring: 0%
- Tallahassee: 0%
- NONE—The St…: 48%

Base: 2021 - April 429 responses.
Method of Arrival / Arrival Airport & Airline

Base: 2021 - April 429 responses.
Method of Arrival / Arrival Airport & Airline

**Airport of Arrival**

- Tampa Int'l. 59%
- St. Pete-Clearwater Int'l 38%
- Orlando Int'l. 2%
- Palm Beach Int'l. 0%
- Sarasota/Bradenton Int'l. 0%
- SW Fl Int'l. (Ft. Myers) 0%
- Miami Int'l. 0%
- Ft. Lauderdale Int'l. 0%
- Sanford Int'l 0%
- Jacksonville Int'l. 0%
- Other 0%

**Airline Used by Airport of Arrival**

- Allegiant 5%
- Southwest 35%
- American Airlines 18%
- United 12%
- Delta Airlines 10%
- Jet Blue 7%
- Sun Country 4%
- Alaska Airlines 0%
- Other 9%

Base: 2021 - April 429 responses.
Rental Vehicle Pick-Up City / Transportation Used In-Market

Rental Vehicle Pick-Up City

- Tampa: 72%
- St. Petersburg/Clearwater area: 16%
- Sarasota/Bradenton: 5%
- Orlando: 4%
- Ft. Myers: 3%
- West Palm Beach: 1%
- Fort Lauderdale: 0%
- Miami: 0%
- Jacksonville: 0%
- Outside of Florida: 0%
- Sanford: 0%

Transportation Used In-Market

- Personal vehicle: 75%
- Rental vehicle: 19%
- Uber, Lyft, etc.: 5%
- Public bus: 1%
- Taxi or limo: 1%
- Boat: 1%
- Free Beach Rides: 0%
- RV: 0%
- Bicycle: 0%
- Motorcycle: 0%
- Tour bus: 0%

Base: 2021 - April 429 responses.
Travel Party Composition / Travel Party Size

**Travel Party Composition**
- Solo: 13%
- Couple: 47%
- Immediate Family: 34%
- Extended Family: 0%
- Group of Couples: 3%
- 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 = 2.6
Percent with Children = 18.4%

Base: 2021 - April 429 responses.
### Important Factors to Destination Decision

- Beaches that suit my tastes: 28%
- Attractions in the area: 28%
- Scenic beauty: 26%
- Weather: 25%
- Friends or family in the area: 25%
- Overall ambiance & atmosphere: 22%
- Easy to get to: 21%
- Arts & cultural offerings: 21%
- Restaurants, cuisine, food scene: 17%
- A specific attraction: 13%
- Recommendation from people I trust: 13%
- Outdoor recreational opportunities: 7%
- Special event(s) and/or festival(s): 7%
- Shopping opportunities: 5%
- St. Pete Pier: 4%

### Trip Activities

- Dining in restaurants: 85%
- Visit the beach: 57%
- Shopping: 52%
- Visit museums: 31%
- Swimming: 29%
- Visit friends or family: 22%
- Photography: 12%
- Guided tour: 12%
- Other boating: 9%
- Attend a festival or special event: 8%
- Bars/Nightlife: 6%
- Fishing: 5%
- Shelling: 5%
- Attend a sporting event: 4%
- Parasailing: 3%

Base: 2021 - April 429 responses.
First-Time Visit to Florida / Previous Visitation to St. Pete/Clearwater

First Time Visitors to Florida

- Yes: 2%
- No: 98%

Previous Visitation to the St. Pete/Clearwater Area

- First Time Visitor: 26%
- 1 - 10 Previous Visits: 45%
- 11 - 20 Previous Visits: 12%
- More than 20 Visits: 17%

Mean # of Past Trips = 21.6

Base: 2021 - April 429 responses.
Attractions Visited / Communities Visited

Attractions Visited:
- Chihuly Exhibit: 11%
- St. Pete Pier: 11%
- Dali Art Museum: 8%
- Sunken Gardens: 8%
- Clearwater Marine Aquarium: 5%
- Tarpon Springs: 5%
- Orlando area Theme Parks: 3%
- Ft. Desoto Park: 3%
- Florida Botanical Gardens: 1%
- Busch Gardens: 1%
- Other: 7%
- NONE OF THESE: 56%

Communities Visited:
- St. Petersburg: 47%
- Clearwater Beach: 37%
- Madeira Beach: 28%
- St. Pete Beach: 17%
- Treasure Island: 15%
- Clearwater: 7%
- Tarpon Springs: 7%
- Indian Shores & Indian Rocks Beach: 5%
- Dunedin: 4%
- North Redington Beach/Redington Shores: 4%
- Pass-A-Grille Beach: 3%
- Gulfport: 2%
- Seminole: 2%
- Tierra Verde: 2%
- Largo: 1%

Base: 2021 - April 429 responses.
Most Liked Aspects of SPC (Unaided)

- Beaches / Ocean: 56%
- Tropical Climate / Warm Weather: 30%
- Scenic Beauty: 28%
- Entertainment / Variety of Fun: 13%
- Attractions (Museums,): 12%
- Everything: 12%
- Food / Restaurants & Bars: 11%
- Relaxing Atmosphere / Ambiance: 10%
- Friendly People: 6%
- Accessible / Convenient /: 5%
- Shopping: 4%
- Family Friendly: 3%
- Clean: 3%
- Great Location / Easy to get to: 1%
- Safe: 1%

Feelings in SPC Area (Unaided)

- Calm / Relaxed: 49%
- Happy: 38%
- Energized / Excited: 10%
- Amazing: 7%
- Entertained: 2%
- Fine / Good: 2%
- Refreshed / Healthy: 2%
- Comfortable: 1%
- Free: 1%
- Safe: 1%

Base: 2021 - April 429 responses.
## Attractions or Services that Would Enhance the Destination Experience

<table>
<thead>
<tr>
<th>Service</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>It needs no improvement</td>
<td>80%</td>
</tr>
<tr>
<td>Cheaper &amp; More Parking</td>
<td>12%</td>
</tr>
<tr>
<td>Less congestion / traffic</td>
<td>7%</td>
</tr>
<tr>
<td>Better Signage / accessibility</td>
<td>1%</td>
</tr>
<tr>
<td>More Public Transportation</td>
<td>1%</td>
</tr>
<tr>
<td>Tourist Information</td>
<td>1%</td>
</tr>
<tr>
<td>More Activities / Attractions</td>
<td>0%</td>
</tr>
<tr>
<td>Better Nightlife</td>
<td>0%</td>
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<tr>
<td>More public restrooms</td>
<td>0%</td>
</tr>
<tr>
<td>More shaded / green areas</td>
<td>0%</td>
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<tr>
<td>Finish the Pier</td>
<td>0%</td>
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<tr>
<td>Restaurant Diversity</td>
<td>0%</td>
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<tr>
<td>More Affordable</td>
<td>0%</td>
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<tr>
<td>Bars and food options on the...</td>
<td>0%</td>
</tr>
<tr>
<td>More Shopping</td>
<td>0%</td>
</tr>
</tbody>
</table>

*Base: 2021 - April 429 responses.*
When Decision to Visit was Made / Travel Planning Resources Used

Average Time Between Decision to Visit and Arrival

55.9 Days in Advance

Resources Used before Arrival and While In St. Pete/Clearwater Area

- User-generated content/Review websites, such as Yelp and TripAdvisor: 36%, 64%
- Opinions of friends or relatives: 16%, 36%
- Online travel agencies (Expedia, Travelocity, etc.): 1%, 31%
- Social Media content: 1%, 25%
- Official St. Petersburg/Clearwater area tourism website, www.VisitStPeteClearwater.com: 1%, 17%
- Travel guides, brochures: 4%, 12%
- Television programming: 2%
- Radio programming: 1%
- YouTube or other online videos: 1%
- Newspaper travel section: 1%
- Lifestyle or travel magazines: 1%
- Travel agency (traditional, offline): 1%
- Gulf to Bay St. Pete/Clearwater Destination Magazine: 1%

BEFORE ARRIVING
WHILE IN ST. PETE/CLEARWATER AREA

Base: 2021 - April 429 responses.
Experience Satisfaction / Earned & Paid Media Recall

Overall Satisfaction

- Very satisfied: 96%
- Satisfied: 4%
- Neutral—neither satisfied nor unsatisfied: 0%
- Unsatisfied: 0%
- Very unsatisfied: 0%

Base: 2021 - April 429 responses.

Media Recall

- Yes: 48%
- No: 51%
- Maybe/Not sure: 1%
Likelihood to Recommend / Likelihood to Return

Likelihood to Recommend: 9.8 / 10
Likelihood to Return: 9.7 / 10

Base: 2021 - April 429 responses.
Demographics

Average Age: 49.5
Average Income: $99,996

Gender:
- Female: 71%
- Male: 29%
- Other: 0%
- I prefer not to answer: 0%

Marital Status:
- Single: 26%
- Single with children under 18: 1%
- Married/partnered: 47%
- Married/partnered with children under 18: 20%
- Other: 6%
- I prefer not to answer: 0%

Race:
- Caucasian: 88%
- Latino/Hispanic: 7%
- Black/African-American: 3%
- Asian/Pacific Islander: 1%
- American Indian/Alaska Native: 1%
- Other: 1%
- I prefer not to answer: 0%

Sexual Orientation:
- Heterosexual: 98%
- LGBTQ: 2%
- Other: 0%
- I prefer not to answer: 0%

Base: 2021 - April 429 responses.
Visit St. Pete Clearwater
Visitor Profile Study
Infographic Profile: 2021 - April 429 responses.
Infographic Profile: 2021 - April 429 responses.

Domestic vs. International

- United States Resident: 99.8%

Point of Origin: Top States

- Florida: 36.9%
- New York: 6.4%
- Ohio: 5.9%

Factors Important to Destination Decision

- Beaches that suit my tastes: 28.4%
- Attractions in the area: 28.4%
- Scenic beauty: 25.5%
- Weather: 24.8%
- Friends or family in the area: 24.6%
- Overall ambiance & atmosphere: 22.2%
Infographic Profile: 2021 - April 429 responses.

Length of Stay
2.8 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
- 2.6 People
- 18.4% Traveled with Children

Daily Spending
- $269.49 Per Person

Top Communities Visited
- St. Petersburg: 48.0%
- Clearwater Beach: 42.4%
- Madeira Beach: 37.5%
- St. Pete Beach: 22.6%
- Treasure Island: 22.4%

Top Activities
- Dining in restaurants: 85.0%
- Visit the beach: 57.4%
- Shopping: 52.5%
- Visit museums: 30.5%