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

Research prepared for Visit St. Pete/Clearwater by:
Destination Analysts

Pinellas County - February 2022
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 404 for February 2022.
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
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
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

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

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

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

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

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

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

Average Income:
- Q4-20: $105,143
- Q4-21: $105,097
- Q4-19: $92,241
DETAILED FINDINGS
**Point of Origin**

**Country of Origin**
- United States: 94%
- United Kingdom: 4%
- Mexico: 1%
- Canada: 1%
- Germany: 0%
- France: 0%
- China: 0%
- Other: 1%

**State of Origin**
- Florida: 26%
- New York: 9%
- California: 8%
- Minnesota: 5%
- Ohio: 4%
- Texas: 4%
- Illinois: 4%
- Pennsylvania: 4%
- Michigan: 3%
- New Jersey: 3%
- Massachusetts: 3%
- Missouri: 3%

**MSA of Origin**
- Tampa, FL: 16%
- Riverside-San Bernardino-Fontana, CA: 5%
- Sarasota-Bradenton, FL: 5%
- Chicago, IL: 4%
- Minneapolis-St. Paul, MN-WI: 4%
- Nassau-Suffolk, NY: 3%
- Los Angeles-Long Beach, CA: 3%
- Boston, MA: 3%
- Fargo-Moorhead, ND-MN: 2%
- New York, NY-NJ: 2%
- Atlanta, GA: 2%
- Orlando, FL: 2%

*Base: 2022 - February 404 responses.*
### Lodging Type / Daily Spending in Market

#### Lodging Type
- Hotel, resort or motel in SPC: 16%
- Home share rental in the SPC: 4%
- Condo/vacation home in the SPC: 7%
- Private residence in SPC: 19%
- Day trip: 54%

#### Daily Spending
- Restaurants: $81
- Hotel/motel/inn/lodging: $69
- Retail store purchases: $61
- Other Entertainment & sightseeing: $39
- Gas, parking and local transportation: $21
- Car rental (in area only): $5
- Other: $3

**Mean Travel Party Spending**
- Spending = $279.40

**Avg # of People Covered by Spending**
- 2.12

**Mean Spending Per Person**
- $131.92

*Base: 2022 - February 404 responses.*
Days & Nights in St. Pete/Clearwater

**Days in Market**

- 1 or more: 4%
- 9: 1%
- 8: 2%
- 7: 12%
- 6: 8%
- 5: 12%
- 4: 12%
- 3: 10%
- 2: 4%
- 1: 36%

**Mean Days**

- ≤ 30: 3.7
- > 30: 5.1

**Nights in Market**

- 10 or more: 4%
- 9: 1%
- 8: 0%
- 7: 8%
- 6: 0%
- 5: 7%
- 4: 14%
- 3: 12%
- 2: 9%
- 1: 3%
- 0: 0%

**Mean Nights**

- ≤ 30: 3.0
- > 30: 4.5

Base: 2022 - February 404 responses.
## Primary Reason for Visit / Other Destinations Visited

### Primary Reason for Visit

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visit friends or family in the area</td>
<td>41%</td>
</tr>
<tr>
<td>Vacation</td>
<td>33%</td>
</tr>
<tr>
<td>Other personal reasons</td>
<td>13%</td>
</tr>
<tr>
<td>Attend special event, exhibition or concert</td>
<td>6%</td>
</tr>
<tr>
<td>Weekend getaway</td>
<td>4%</td>
</tr>
<tr>
<td>Business</td>
<td>2%</td>
</tr>
<tr>
<td>Wedding</td>
<td>1%</td>
</tr>
<tr>
<td>Conference/tradeshow or other group meeting</td>
<td>1%</td>
</tr>
<tr>
<td>On or pre/post a cruise</td>
<td>0%</td>
</tr>
<tr>
<td>Attend sports event/tournament</td>
<td>0%</td>
</tr>
<tr>
<td>Honeymoon</td>
<td>0%</td>
</tr>
<tr>
<td>Government business/travel</td>
<td>0%</td>
</tr>
</tbody>
</table>

### Other Destinations Visited on SPC Trip

<table>
<thead>
<tr>
<th>Destination</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tampa</td>
<td>41%</td>
</tr>
<tr>
<td>Orlando/Disney</td>
<td>10%</td>
</tr>
<tr>
<td>Sarasota Area</td>
<td>8%</td>
</tr>
<tr>
<td>Ft. Myers/SW Florida</td>
<td>3%</td>
</tr>
<tr>
<td>Ft. Lauderdale/Palm Beach</td>
<td>2%</td>
</tr>
<tr>
<td>Crystal River</td>
<td>2%</td>
</tr>
<tr>
<td>Jax/St. Augustine</td>
<td>1%</td>
</tr>
<tr>
<td>Panhandle</td>
<td>1%</td>
</tr>
<tr>
<td>Florida Keys</td>
<td>1%</td>
</tr>
<tr>
<td>Lakeland/Winter Haven</td>
<td>1%</td>
</tr>
<tr>
<td>Miami</td>
<td>1%</td>
</tr>
<tr>
<td>Ocala/Gainesville</td>
<td>0%</td>
</tr>
<tr>
<td>Sebring</td>
<td>0%</td>
</tr>
<tr>
<td>Kennedy/Space…</td>
<td>0%</td>
</tr>
<tr>
<td>Daytona</td>
<td>0%</td>
</tr>
<tr>
<td>Tallahassee</td>
<td>0%</td>
</tr>
<tr>
<td>Everglades</td>
<td>0%</td>
</tr>
<tr>
<td>NONE—The St. Johns Anchorage</td>
<td>46%</td>
</tr>
</tbody>
</table>

*Base: 2022 - February 404 responses.*
Method of Arrival / Arrival Airport & Airline

Method of Arrival

- Personal vehicle: 58%
- Airline: 43%
- Rental vehicle: 8%
- Rideshare (Uber, Lyft, etc.): 4%
- RV: 0%
- Tour bus: 0%
- Train: 0%
- Public bus: 0%
- Taxi or limo: 0%
- Other: 0%

Method of Departure

- Personal vehicle: 57%
- Airline: 30%
- Rental vehicle: 8%
- Rideshare (Uber, Lyft, etc.): 4%
- Taxi or limo: 0%
- RV: 0%
- Tour bus: 0%
- Train: 0%
- Public bus: 0%
- Other: 0%

Base: 2022 - February 404 responses.
### Method of Arrival / Arrival Airport & Airline

#### Airport of Arrival

<table>
<thead>
<tr>
<th>Airport of Arrival</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tampa Int'l.</td>
<td>70%</td>
</tr>
<tr>
<td>St. Pete-Clearwater Int'l.</td>
<td>18%</td>
</tr>
<tr>
<td>Orlando Int'l.</td>
<td>11%</td>
</tr>
<tr>
<td>Sarasota/Bradenton Int'l.</td>
<td>1%</td>
</tr>
<tr>
<td>Miami Int'l.</td>
<td>0%</td>
</tr>
<tr>
<td>SW Fl Int'l. (Ft. Myers)</td>
<td>0%</td>
</tr>
<tr>
<td>Ft. Lauderdale Int'l.</td>
<td>0%</td>
</tr>
<tr>
<td>Palm Beach Int'l.</td>
<td>0%</td>
</tr>
<tr>
<td>Sanford Int'l.</td>
<td>0%</td>
</tr>
<tr>
<td>Jacksonville Int'l.</td>
<td>0%</td>
</tr>
<tr>
<td>Other</td>
<td>0%</td>
</tr>
</tbody>
</table>

#### Airline Used by Airport of Arrival

- **Tampa Int'l.**
  - American Airlines: 33.4%
  - Delta Airlines: 27.7%
  - Allegiant: 0.0%
  - Southwest: 21.4%
  - United: 6.6%
  - Jet Blue: 5.9%
  - Alaska Airlines: 0.6%
  - Sun Country: 0.0%
  - Other: 4.3%

- **St. Pete-Clearwater Int'l**
  - American Airlines: 100.0%
  - Delta Airlines: 0.0%
  - Allegiant: 0.0%
  - Southwest: 0.0%
  - United: 0.0%
  - Jet Blue: 0.0%
  - Alaska Airlines: 0.0%
  - Sun Country: 0.0%
  - Other: 0.0%

(base: 2022 - February 404 responses)
Rental Vehicle Pick-Up City / Transportation Used In-Market

**Rental Vehicle Pick-Up City**

- Tampa: 69%
- Orlando: 18%
- St. Petersburg/Clearwater area: 10%
- Sarasota/Bradenton: 1%
- Miami: 1%
- Ft. Myers: 0%
- Fort Lauderdale: 0%
- West Palm Beach: 0%
- Jacksonville: 0%
- Outside of Florida: 0%
- Sanford: 0%

**Transportation Used In-Market**

- Personal vehicle: 74%
- Rental vehicle: 21%
- Uber, Lyft, etc.: 6%
- Free Beach Rides: 0%
- Tour bus: 0%
- Taxi or limo: 0%
- Public bus: 0%
- Bicycle: 0%
- Motorcycle: 0%
- RV: 0%
- Boat: 0%

Base: 2022 - February 404 responses.
Travel Party Composition / Travel Party Size

**Travel Party Composition**

- Solo: 21%
- Couple: 57%
- Immediate Family: 23%
- Extended Family: 1%
- Group of Couples: 2%
- Group of Friends: 8%
- 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.): 0.2
- Male children (0 to 17 yrs.): 0.2

Base: 2022 - February 404 responses.
Important Factors to Destination Decision / Trip Activities

### Important to Decision to Visit

- **Weather**: 80%
- **Overall ambiance & atmosphere**: 72%
- **Scenic beauty**: 65%
- **"Restaurants, cuisine, food scene"**: 62%
- **Beaches that suit my tastes**: 60%
- **Recommendation from people I know**: 60%
- **Easy to get to**: 59%
- **Shopping opportunities**: 59%
- **Attractions in the area**: 58%
- **Breweries/Distilleries/Craft beer**: 58%
- **The SPC area is romantic**: 57%
- **Friends or family in the area**: 55%
- **The SPC area is family-friendly**: 51%
- **Advertisements for the area**: 50%
- **Arts & cultural offerings**: 45%

### Trip Activities

- **Dining in restaurants**: 98%
- **Shopping**: 84%
- **Visit the beach**: 82%
- **Visit breweries and/or distilleries**: 58%
- **Visit friends or family**: 55%
- **Bars/Nightlife**: 53%
- **Bird watching**: 45%
- **Photography**: 38%
- **Visit museums**: 36%
- **Guided tour**: 29%
- **Other boating**: 18%
- **Swimming**: 15%
- **Fishing**: 15%
- **Biking**: 6%
- **Attend a festival or special event**: 5%

**Base:** 2022 - February 404 responses.
First-Time Visit to Florida / Previous Visitation to St. Pete/Clearwater

First Time Visitors to Florida

- Yes: 3%
- No: 97%

Previous Visitation to the St. Pete/Clearwater Area

- First Time Visitor: 17%
- 1 - 10 Previous Visits: 28%
- 11 - 20 Previous Visits: 14%
- More than 20 Visits: 40%

Mean # of Past Trips = 15.6

Base: 2022 – February 404 responses.
Attractions Visited / Communities Visited

**Attractions Visited**
- St. Pete Pier: 48%
- Chihuly Exhibit: 19%
- Dali Art Museum: 17%
- Sunken Gardens: 6%
- Orlando area Theme Parks: 5%
- Busch Gardens: 2%
- Tarpon Springs: 2%
- Clearwater Marine Aquarium: 2%
- Florida Botanical Gardens: 0%
- Florida Aquarium in Tampa: 0%
- Other: 15%
- NONE OF THESE: 39%

**Communities Visited**
- St. Petersburg: 68%
- Pinellas Park: 55%
- Madeira Beach: 54%
- Clearwater Beach: 39%
- Seminole: 36%
- Treasure Island: 35%
- Clearwater: 29%
- Gulfport: 27%
- St. Pete Beach: 19%
- Safety Harbor: 12%
- Largo: 10%
- Dunedin: 10%
- Indian Shores & Indian Rocks: 7%
- Tarpon Springs: 7%
- Palm Harbor: 6%

*Base: 2022 - February 404 responses.*
### Most Liked Aspects of SPC (Unaided)

- **Scenic Beauty**: 66%
- **Tropical Climate / Warm Weather**: 63%
- **Food / Restaurants & Bars**: 59%
- **Relaxing Atmosphere / Ambiance**: 59%
- **Clean**: 58%
- **Entertainment / Variety of Fun…**: 58%
- **Friendly People**: 58%
- **Accessible / Convenient / Walkable**: 58%
- **Shopping**: 57%
- **Family Friendly**: 57%
- **Beaches / Ocean**: 57%
- **Safe**: 57%
- **“Attractions (Museums,…**: 56%
- **Everything**: 52%
- **Great Location / Easy to get to**: 48%

### Feelings in SPC Area (Unaided)

- **Happy**: 72%
- **Calm / Relaxed**: 69%
- **Amazing**: 62%
- **Refreshed / Healthy**: 61%
- **Energized / Excited**: 60%
- **Comfortable**: 58%
- **Welcomed**: 58%
- **Entertained**: 58%
- **Safe**: 57%
- **Fine / Good**: 42%

*Base: 2022 - February 404 responses.*
Attractions or Services that Would Enhance the Destination Experience

Additional Attractions or Services (Unaided)

- It needs no improvement: 95%
- Cheaper & More Parking: 3%
- Less congestion / traffic: 3%
- More Public Transportation Options: 0%
- Restaurant Diversity: 0%
- Bars and food options on the beach: 0%
- Better Signage /accessibility: 0%
- Finish the Pier: 0%
- More Affordable: 0%
- More public restrooms: 0%
- Tourist Information: 0%
- More shaded / green areas: 0%
- More Shopping: 0%
- More kid friendly activities: 0%
- Better Nightlife: 0%

Base: 2022 - February 404 responses.
When Decision to Visit was Made / Travel Planning Resources Used

Average Time Between Decision to Visit and Arrival

32.9 Days in Advance

Resources Used before Arrival and While In Market

<table>
<thead>
<tr>
<th>Resource</th>
<th>Before Arriving</th>
<th>While in St. Pete/Clearwater Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>User-generated content/Review websites, such as Yelp</td>
<td>50%</td>
<td></td>
</tr>
<tr>
<td>and…</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Opinions of friends or relatives</td>
<td>47%</td>
<td></td>
</tr>
<tr>
<td>Social Media content</td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>Online travel agencies (Expedia, Travelocity, etc.)</td>
<td>32%</td>
<td></td>
</tr>
<tr>
<td>Official St. Petersburg/Clearwater area</td>
<td>29%</td>
<td></td>
</tr>
<tr>
<td>YouTube or other online videos</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Travel guides, brochures</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Travel agency (traditional, offline)</td>
<td>1%</td>
<td></td>
</tr>
<tr>
<td>Lifestyle or travel magazines</td>
<td>1%</td>
<td></td>
</tr>
<tr>
<td>Radio programming</td>
<td>1%</td>
<td></td>
</tr>
<tr>
<td>Television programming</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Gulf to Bay St. Pete/Clearwater Destination Magazine</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Newspaper travel section</td>
<td>0%</td>
<td></td>
</tr>
</tbody>
</table>

Base: 2022 - February 404 responses.
**Experience Satisfaction / Earned & Paid Media Recall**

### Overall Satisfaction
- **Very satisfied**: 99%
- **Satisfied**: 1%
- **Neutral—neither satisfied nor unsatisfied**: 0%
- **Unsatisfied**: 0%
- **Very unsatisfied**: 0%

### Media Recall
- **Yes**: 45%
- **No**: 55%
- **Maybe/ Not sure**: 0%

Base: 2022 - February 404 responses.
Likelihood to Recommend / Likelihood to Return

Likelihood to Recommend

10.0 / 10

Likelihood to Return

9.9 / 10

Base: 2022 - February 404 responses.
**Demographics**

**Gender Distribution**
- Female: 69%
- Male: 31%
- Other: 0%
- I prefer not to answer: 0%

**Age Distribution**
- Average Age: 50.9

**Income Distribution**
- Average Income: $14

**Race Distribution**
- Caucasian: 78%
- Black/African-American: 10%
- Latino/Hispanic: 5%
- Asian/Pacific Islander: 4%
- American Indian/Alaska Native: 4%
- Other: 0%
- I prefer not to answer: 0%

**Marital Status Distribution**
- Single: 24%
- Single with children under 18: 15%
- Married/partnered: 56%
- Married/partnered with children under 18: 15%
- Other: 2%
- I prefer not to answer: 0%

**Orientation Distribution**
- Heterosexual: 42%
- LGBTQ: 33%
- Other: 53%
- I prefer not to answer: 0%

Base: 2022 - February 404 responses.
Visit St. Pete Clearwater
Visitor Profile Study
Infographic Profile: 2022 - February 404 responses.
Infographic Profile: 2022 - February 404 responses.

**Domestic vs. International**
- United States Resident: 94%
- International Visitor: 6%

**Point of Origin: Top States**
- Florida: 26%
- New York: 9%
- California: 8%

**Factors Important to Destination Decision**
- Weather: 80%
- Overall ambiance & atmosphere: 72%
- Scenic beauty: 65%
- "Restaurants, cuisine, food scene": 62%
- Beaches that suit my tastes: 60%
- Recommendation from people I know: 60%
Infographic Profile: 2022 - February 404 responses.

Length of Stay
3.7 Days (on average)

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

Travel Party Size
- 2.2 People
- 17.5% Traveled with Children

Daily Spending
- $131.92 Per Person

Top Communities Visited
- St. Petersburg: 68%
- Madeira Beach: 62%
- Pinellas Park: 55%
- Treasure Island: 40%
- Seminole: 37%

Top Activities
- Dining in restaurants: 98%
- Shopping: 84%
- Visit the beach: 82%
- Visit breweries and/or distilleries: 58%

Destination Analysts