Visit St. Pete Clearwater
Visitor Profile Study

Pinellas County - June 2021
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.

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>0</td>
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<td>February</td>
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<td>April</td>
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<td>May</td>
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<td>June</td>
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<td>504</td>
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<tr>
<td>July</td>
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<td>August</td>
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<td>September</td>
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<td>October</td>
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<td>November</td>
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<tr>
<td>December</td>
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<tr>
<td>Total</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>504</td>
</tr>
</tbody>
</table>
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
Lodging Type / Daily Spending in Market

**Lodging Type**
- Hotel, resort or motel in SPC: 19%
- Home share rental in the SPC: 5%
- Condo/vacation home in the SPC: 10%
- Private residence in SPC: 1%
- Day trip: 65%

**Daily Spending**
- Restaurants: $99
- Hotel/motel/inn/lodging: $94
- Retail store purchases: $50
- Other Entertainment & sightseeing: $30
- Gas, parking and local transportation: $12
- Car rental (in area only): $3
- Other: $2

**Mean Travel Party Spending** = $291
**Avg # of People Covered by Spending** = 3
**Mean Spending Per Person** = $109

Base: 2021 - June 504 responses.
Days & Nights in St. Pete/Clearwater

**Days in Market**

<table>
<thead>
<tr>
<th>Days</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 or more</td>
<td>3%</td>
</tr>
<tr>
<td>9</td>
<td>0%</td>
</tr>
<tr>
<td>8</td>
<td>7%</td>
</tr>
<tr>
<td>7</td>
<td>11%</td>
</tr>
<tr>
<td>6</td>
<td>6%</td>
</tr>
<tr>
<td>5</td>
<td>6%</td>
</tr>
<tr>
<td>4</td>
<td>3%</td>
</tr>
<tr>
<td>3</td>
<td>4%</td>
</tr>
<tr>
<td>2</td>
<td>5%</td>
</tr>
<tr>
<td>1</td>
<td>55%</td>
</tr>
</tbody>
</table>

**Nights in Market**

<table>
<thead>
<tr>
<th>Nights</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 or more</td>
<td>2%</td>
</tr>
<tr>
<td>9</td>
<td>1%</td>
</tr>
<tr>
<td>8</td>
<td>0%</td>
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<tr>
<td>7</td>
<td>7%</td>
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<tr>
<td>6</td>
<td>11%</td>
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<tr>
<td>5</td>
<td>6%</td>
</tr>
<tr>
<td>4</td>
<td>5%</td>
</tr>
<tr>
<td>3</td>
<td>3%</td>
</tr>
<tr>
<td>2</td>
<td>3%</td>
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<tr>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>0</td>
<td>60%</td>
</tr>
</tbody>
</table>

**Mean Days**

- \[\leq 30\] = 3
- \[> 30\] = 3

**Mean Nights**

- \[\leq 30\] = 2
- \[> 30\] = 2

Base: 2021 - June 504 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>Vacation</td>
<td>59%</td>
</tr>
<tr>
<td>Attend special event, exhibition or concert</td>
<td>15%</td>
</tr>
<tr>
<td>Visit friends or family in the area</td>
<td>14%</td>
</tr>
<tr>
<td>Other personal reasons</td>
<td>6%</td>
</tr>
<tr>
<td>Weekend getaway</td>
<td>3%</td>
</tr>
<tr>
<td>Business</td>
<td>2%</td>
</tr>
<tr>
<td>Wedding</td>
<td>0%</td>
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<tr>
<td>Honeymoon</td>
<td>0%</td>
</tr>
<tr>
<td>Conference/tradeshow or other group meeting</td>
<td>0%</td>
</tr>
<tr>
<td>Attend sports event/tournament</td>
<td>0%</td>
</tr>
<tr>
<td>On or pre/post a cruise</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>32%</td>
</tr>
<tr>
<td>Sarasota Area</td>
<td>15%</td>
</tr>
<tr>
<td>Orlando/Disney</td>
<td>6%</td>
</tr>
<tr>
<td>Ft. Myers/SW Florida</td>
<td>2%</td>
</tr>
<tr>
<td>Lakeland/Winter Haven</td>
<td>2%</td>
</tr>
<tr>
<td>Miami</td>
<td>2%</td>
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<tr>
<td>Ocala/Gainesville</td>
<td>1%</td>
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<tr>
<td>Jax/St. Augustine</td>
<td>1%</td>
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<tr>
<td>Crystal River</td>
<td>1%</td>
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<tr>
<td>Tallahassee</td>
<td>1%</td>
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<tr>
<td>Florida Keys</td>
<td>1%</td>
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<tr>
<td>Everglades</td>
<td>0%</td>
</tr>
<tr>
<td>Ft. Lauderdale/Palm Beach</td>
<td>0%</td>
</tr>
<tr>
<td>Kennedy/Space</td>
<td>0%</td>
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<tr>
<td>Panhandle</td>
<td>0%</td>
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<tr>
<td>Sebring</td>
<td>0%</td>
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<tr>
<td>Daytona</td>
<td>0%</td>
</tr>
<tr>
<td>NONE—The State</td>
<td>45%</td>
</tr>
</tbody>
</table>

Base: 2021 - June 504 responses.
**Method of Arrival / Arrival Airport & Airline**

**Method of Arrival**
- Personal vehicle: 63%
- Airline: 35%
- Rental vehicle: 3%
- Rideshare (Uber, Lyft, etc.): 1%
- RV: 0%
- Taxi or limo: 0%
- Tour bus: 0%
- Train: 0%
- Public bus: 0%
- Other: 1%

**Method of Departure**
- Personal vehicle: 52%
- Airline: 42%
- Rental vehicle: 4%
- Rideshare (Uber, Lyft, etc.): 2%
- Taxi or limo: 0%
- RV: 0%
- Tour bus: 0%
- Train: 0%
- Public bus: 0%
- Other: 0%

**Base:** 2021 - June 504 responses.
### Method of Arrival / Arrival Airport & Airline

#### Airport of Arrival

<table>
<thead>
<tr>
<th>Airport of Arrival</th>
<th>72%</th>
<th>25%</th>
<th>3%</th>
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</thead>
<tbody>
<tr>
<td>Tampa Int'l.</td>
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<tr>
<td>St. Pete-Clearwater Int'l</td>
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<tr>
<td>Orlando Int'l.</td>
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<tr>
<td>Miami Int'l.</td>
<td>0%</td>
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<tr>
<td>Sarasota/Bradenton Int'l</td>
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<tr>
<td>SW Fl Int'l. (Ft. Myers)</td>
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<tr>
<td>Ft. Lauderdale Int'l.</td>
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<tr>
<td>Palm Beach Int'l.</td>
<td>0%</td>
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<tr>
<td>Sanford Int'l</td>
<td>0%</td>
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<tr>
<td>Jacksonville Int'l.</td>
<td>0%</td>
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<tr>
<td>Other</td>
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</tbody>
</table>

#### Airline Used by Airport of Arrival

- **Allegiant**: 1% (97%)
- **Southwest**: 33%
- **Delta Airlines**: 31%
- **American Airlines**: 13%
- **United**: 12%
- **Jet Blue**: 5%
- **Sun Country**: 1%
- **Alaska Airlines**: 0%
- **Other**: 4%

- **Tampa Int'l.**: 72%
- **St. Pete-Clearwater Int'l**: 25%

Base: 2021 - June 504 responses.
Rental Vehicle Pick-Up City / Transportation Used In-Market

**Rental Vehicle Pick-Up City**
- Tampa: 78%
- St. Petersburg/Clearwater area: 13%
- Orlando: 9%
- Ft. Myers: 0%
- Sarasota/Bradenton: 0%
- Fort Lauderdale: 0%
- Miami: 0%
- West Palm Beach: 0%
- Jacksonville: 0%
- Outside of Florida: 0%
- Sanford: 0%

**Transportation Used In-Market**
- Personal vehicle: 72%
- Rental vehicle: 22%
- Uber, Lyft, etc.: 7%
- Free Beach Rides: 1%
- Taxi or limo: 1%
- Tour bus: 0%
- Public bus: 0%
- Bicycle: 0%
- Motorcycle: 0%
- RV: 0%
- Boat: 0%

Base: 2021 - June 504 responses.
Travel Party Composition / Travel Party Size

### Travel Party Composition

- Solo: 14%
- Couple: 38%
- Immediate Family: 36%
- Extended Family: 2%
- Group of Couples: 5%
- Group of Friends: 15%
- 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

Avg Travel Party Size = 3
Percent with Children = 25%

Base: 2021 - June 504 responses.
Important Factors to Destination Decision / Trip Activities

**Important to Decision to Visit**

- Beaches that suit my tastes: 41%
- Easy to get to: 25%
- Arts & cultural offerings: 22%
- Friends or family in the area: 22%
- Overall ambiance & atmosphere: 22%
- Attractions in the area: 21%
- Scenic beauty: 21%
- Weather: 20%
- Advertisements for the area: 17%
- Recommendation from people I know: 13%
- Restaurants, cuisine, food scene: 11%
- A specific attraction: 10%
- Appealing hotels/resorts: 9%
- Shopping opportunities: 7%
- Articles, features, reviews: 3%

**Trip Activities**

- Dining in restaurants: 91%
- Visit the beach: 61%
- Shopping: 53%
- Swimming: 42%
- Visit museums: 35%
- Visit friends or family: 17%
- Other boating: 12%
- Guided tour: 7%
- Photography: 7%
- Bird watching: 6%
- Fishing: 5%
- Kayaking/Canoeing: 5%
- Shelling: 5%
- Jet skiing: 4%
- Bars/Nightlife: 4%

Base: 2021 - June 504 responses.
First-Time Visit to Florida / Previous Visitation to St. Pete/Clearwater

First Time Visitors to Florida

- Yes: 6%
- No: 94%

Previous Visitation to the St. Pete/Clearwater Area

- First Time Visitor: 30%
- 1 - 10 Previous Visits: 42%
- 11 - 20 Previous Visits: 7%
- More than 20 Visits: 20%

Mean # of Past Trips = 25

Base: 2021 - June 504 responses.
### Attractions Visited

<table>
<thead>
<tr>
<th>Attraction</th>
<th>Visited %</th>
</tr>
</thead>
<tbody>
<tr>
<td>St. Pete Pier</td>
<td>24%</td>
</tr>
<tr>
<td>Chihuly Exhibit</td>
<td>16%</td>
</tr>
<tr>
<td>Sunken Gardens</td>
<td>12%</td>
</tr>
<tr>
<td>Dali Art Museum</td>
<td>9%</td>
</tr>
<tr>
<td>Clearwater Marine Aquarium</td>
<td>5%</td>
</tr>
<tr>
<td>Florida Aquarium in Tampa</td>
<td>4%</td>
</tr>
<tr>
<td>Ft. Desoto Park</td>
<td>4%</td>
</tr>
<tr>
<td>Orlando area Theme Parks</td>
<td>3%</td>
</tr>
<tr>
<td>Busch Gardens</td>
<td>2%</td>
</tr>
<tr>
<td>Caladesi Island</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
</tr>
<tr>
<td>NONE OF THESE</td>
<td>50%</td>
</tr>
</tbody>
</table>

### Communities Visited

<table>
<thead>
<tr>
<th>Community</th>
<th>Visited %</th>
</tr>
</thead>
<tbody>
<tr>
<td>St. Petersburg</td>
<td>49%</td>
</tr>
<tr>
<td>Clearwater Beach</td>
<td>38%</td>
</tr>
<tr>
<td>St. Pete Beach</td>
<td>27%</td>
</tr>
<tr>
<td>Madeira Beach</td>
<td>26%</td>
</tr>
<tr>
<td>Treasure Island</td>
<td>16%</td>
</tr>
<tr>
<td>Clearwater</td>
<td>9%</td>
</tr>
<tr>
<td>Indian Shores &amp; Indian Rocks Beach</td>
<td>8%</td>
</tr>
<tr>
<td>Dunedine</td>
<td>6%</td>
</tr>
<tr>
<td>Pass-A-Grille Beach</td>
<td>5%</td>
</tr>
<tr>
<td>North Redington Beach/Redington Beach</td>
<td>5%</td>
</tr>
<tr>
<td>Tarpon Springs</td>
<td>2%</td>
</tr>
<tr>
<td>Seminole</td>
<td>2%</td>
</tr>
<tr>
<td>Palm Harbor</td>
<td>1%</td>
</tr>
<tr>
<td>Tierra Verde</td>
<td>1%</td>
</tr>
<tr>
<td>Gulfport</td>
<td>1%</td>
</tr>
</tbody>
</table>

Base: 2021 - June 504 responses.
Most Liked Aspects of SPC (Unaided)

- Beaches / Ocean: 57%
- Tropical Climate / Warm Weather: 27%
- Scenic Beauty: 26%
- Attractions (Museums,…) : 22%
- Everything: 15%
- Entertainment / Variety of Fun…: 12%
- Relaxing Atmosphere / Ambiance: 8%
- Food / Restaurants & Bars: 4%
- Friendly People: 4%
- Clean: 3%
- Family Friendly: 3%
- Great Location / Easy to get to: 3%
- Accessible / Convenient /…: 2%
- Safe: 1%
- Shopping: 1%

Feelings in SPC Area (Unaided)

- Calm / Relaxed: 40%
- Happy: 24%
- Energized / Excited: 9%
- Entertained: 7%
- Amazing: 6%
- Refreshed / Healthy: 6%
- Fine / Good: 5%
- Comfortable: 3%
- Welcomed: 2%
- Warm: 0%

Base: 2021 - June 504 responses.
At Attractions or Services that Would Enhance the Destination Experience

Additional Attractions or Services (Unaided)

- It needs no improvement: 86%
- Cheaper & More Parking: 6%
- Less congestion / traffic: 3%
- More kid friendly activities: 1%
- Bars and food options on the...: 1%
- More shaded / green areas: 1%
- Better Nightlife: 1%
- Restaurant Diversity: 1%
- More public restrooms: 0%
- More Public Transportation...: 0%
- More Affordable: 0%
- Tourist Information: 0%
- More beach & boardwalk rentals: 0%
- More Activities / Attractions: 0%
- Finish the Pier: 0%

Base: 2021 - June 504 responses.
When Decision to Visit was Made / Travel Planning Resources Used

Average Time Between Decision to Visit and Arrival

46 Days in Advance

Resources Used before Arrival and While In Market

- Social Media content: 54% (BEFORE ARRIVING) vs. 43% (WHILE IN ST. PETE/CLEARWATER AREA)
- User-generated content/Review websites, such as Yelp and...: 43% vs. 29%
- Online travel agencies (Expedia, Travelocity, etc.): 42% vs. 0%
- Official St. Petersburg/Clearwater area tourism website, ...: 42% vs. 8%
- Opinions of friends or relatives: 29% vs. 15%
- Travel guides, brochures: 18% vs. 17%
- YouTube or other online videos: 15% vs. 10%
- Television programming: 10% vs. 8%
- Newspaper travel section: 6% vs. 5%
- Lifestyle or travel magazines: 4% vs. 1%
- Gulf to Bay St. Pete/Clearwater Destination Magazine: 3% vs. 2%
- Radio programming: 2% vs. 2%
- Travel agency (traditional, offline): 0% vs. 2%

Base: 2021 - June 504 responses.
Experience Satisfaction / Earned & Paid Media Recall

### Overall Satisfaction
- Very satisfied: 93%
- Satisfied: 7%
- Neutral—neither satisfied nor unsatisfied: 0%
- Unsatisfied: 0%
- Very unsatisfied: 0%

### Media Recall
- Yes: 54%
- No: 39%
- Maybe/Not sure: 7%

Base: 2021 - June 504 responses.
Likelihood to Recommend / Likelihood to Return

Likelihood to Recommend

9.8 / 10

Likelihood to Return

9.5 / 10

Base: 2021 - June 504 responses.
Demographics

- Female: 71%
- Male: 29%
- Other: 1%
- I prefer not to answer: 0%

Average Age: 46.2
Average Income: $116,070

- Caucasian: 91%
- Black/African-American: 4%
- Latino/Hispanic: 3%
- Asian/Pacific Islander: 1%
- American Indian/Alaska Native: 0%
- Other: 0%
- I prefer not to answer: 0%

- Heterosexual: 97%
- LGBTQ: 2%
- Other: 0%
- I prefer not to answer: 1%

Base: 2021 - June 504 responses.
Visit St. Pete Clearwater
Visitor Profile Study
Infographic Profile: 2021 - June 504 responses.
Infographic Profile: 2021 - June 504 responses.

- 18.1% Millennials
- 45.4% Gen X
- 18.8% Baby Boomers

Domestic vs. International:
- United States Resident: 99.4%
- International Visitor: 0.6%

Point of Origin: Top States
- Florida: 37.1%
- North Carolina: 6.6%
- Georgia: 6.2%

Factors Important to Destination Decision:
- Beaches that suit my tastes: 40.9%
- Easy to get to: 24.6%
- Arts & cultural offerings: 22.2%
- Friends or family in the area: 21.9%
- Overall ambiance & atmosphere: 21.6%
- Attractions in the area: 20.6%
Infographic Profile: 2021 - June 504 responses.

Length of Stay

3.2 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**

2.9 People

25.3% Traveled with Children

**Daily Spending**

$291.12 Per Person

**Top Communities Visited**

- St. Petersburg: 47.8%
- Clearwater Beach: 44.6%
- St. Pete Beach: 41.7%
- Madeira Beach: 34.7%
- Treasure Island: 25.2%

**Top Activities**

- Dining in restaurants: 91.4%
- Visit the beach: 61.4%
- Shopping: 53.0%
- Swimming: 42.2%