Visit St. Pete Clearwater
Visitor Profile Study

Pinellas County – March 2021
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.
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
VISIT ST. PETE/CLEARWATER  March 2021

**Average Time Between Decision to Visit & Arrival**
- Mar-19: 79.1
- Mar-20: 71.0
- Mar-21: 65.4

**Average Daily Spending**
- Mar-21: $301.76
- Mar-20: $235.98
- Mar-19: $201.84

**Travel Party Size**
- Mar-21: 2.7
- Mar-19: 2.6
- Mar-20: 2.6

**Average Days & Nights**
- Days:
  - Mar-19: 3.5
  - Mar-20: 3.3
  - Mar-21: 3.6
- Nights:
  - Mar-19: 2.6
  - Mar-20: 2.8
  - Mar-21: 2.8

**Percent Staying Overnight**
- Mar-19: 36.7%
- Mar-20: 45.1%
- Mar-21: 40.3%

**Average Age**
- Mar-19: 52.6
- Mar-20: 49.6
- Mar-21: 52.1

**Average Income**
- Mar-19: $106,045
- Mar-20: $109,722
- Mar-21: $113,363
Point of Origin

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

**State of Origin**
- Florida: 28%
- Illinois: 8%
- Ohio: 8%
- New York: 7%
- Michigan: 6%
- Virginia: 5%
- Indiana: 4%
- Pennsylvania: 4%
- Tennessee: 3%
- North Carolina: 3%
- Minnesota: 3%
- Wisconsin: 2%

**MSA of Origin**
- Tampa, FL: 13%
- Sarasota-Bradenton, FL: 9%
- Chicago, IL: 6%
- Buffalo-Niagara Falls, NY: 3%
- Lakeland-Winter Haven, FL: 3%
- Orlando, FL: 3%
- Norfolk-Virginia Beach-Newport News, VA-NC: 3%
- Minneapolis-St. Paul, MN-WI: 2%
- Washington, DC-MD-VA: 2%
- Philadelphia, PA-NJ: 2%
- Charlotte-Gastonia-Rock Hill, NC-SC: 2%
- Grand Rapids-Muskegon-Holland, MI: 2%

Base: 2021 - March 425 responses.
Lodging Type / Daily Spending in Market

Lodging Type
- Hotel, resort or motel in SPC: 20%
- Home share rental in the SPC: 8%
- Condo/vacation home in the SPC: 9%
- Private residence in SPC: 3%
- Day trip: 60%

Daily Spending
- Restaurants: $108
- Hotel/motel/inn/lodging: $95
- Retail store purchases: $48
- Other Entertainment & sightseeing: $32
- Gas, parking and local transportation: $16
- Car rental (in area only): $2
- Other: $1

Mean Travel Party Spending = $301.76
Avg # of People Covered by Spending = 2.55
Mean Spending Per Person = $118.33

Base: 2021 - March 425 responses.
Days & Nights in St. Pete/Clearwater

Days in Market

<table>
<thead>
<tr>
<th>Days in Market</th>
<th>0%</th>
<th>10%</th>
<th>20%</th>
<th>30%</th>
<th>40%</th>
<th>50%</th>
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<tbody>
<tr>
<td>10 or more</td>
<td>9%</td>
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<td>1%</td>
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Mean Days

≤ 30 = 3.5
> 30 = 6.4

Nights in Market

<table>
<thead>
<tr>
<th>Nights in Market</th>
<th>0%</th>
<th>10%</th>
<th>20%</th>
<th>30%</th>
<th>40%</th>
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<th>60%</th>
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<tbody>
<tr>
<td>10 or more</td>
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<td>1%</td>
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<tr>
<td>0</td>
<td>54%</td>
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</tbody>
</table>

Mean Nights

≤ 30 = 2.6
> 30 = 5.3

Base: 2021 - March 425 responses.
Primary Reason for Visit / Other Destinations Visited

<table>
<thead>
<tr>
<th>Primary Reason for Visit</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation</td>
<td>57%</td>
</tr>
<tr>
<td>Visit friends or family in the area</td>
<td>18%</td>
</tr>
<tr>
<td>Other personal reasons</td>
<td>18%</td>
</tr>
<tr>
<td>Weekend getaway</td>
<td>6%</td>
</tr>
<tr>
<td>Wedding</td>
<td>0%</td>
</tr>
<tr>
<td>Business</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>Honeymoon</td>
<td>0%</td>
</tr>
<tr>
<td>Attend special event, exhibition or concert</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>33%</td>
</tr>
<tr>
<td>Sarasota Area</td>
<td>15%</td>
</tr>
<tr>
<td>Orlando/Disney</td>
<td>7%</td>
</tr>
<tr>
<td>Crystal River</td>
<td>3%</td>
</tr>
<tr>
<td>Ft. Myers/SW Florida</td>
<td>3%</td>
</tr>
<tr>
<td>Lakeland/Winter Haven</td>
<td>2%</td>
</tr>
<tr>
<td>Ocala/Gainesville</td>
<td>2%</td>
</tr>
<tr>
<td>Florida Keys</td>
<td>1%</td>
</tr>
<tr>
<td>Kennedy/Space…</td>
<td>1%</td>
</tr>
<tr>
<td>Everglades</td>
<td>1%</td>
</tr>
<tr>
<td>Jax/St. Augustine</td>
<td>1%</td>
</tr>
<tr>
<td>Ft. Lauderdale/Palm Beach</td>
<td>1%</td>
</tr>
<tr>
<td>Miami</td>
<td>1%</td>
</tr>
<tr>
<td>Daytona</td>
<td>1%</td>
</tr>
<tr>
<td>Sebring</td>
<td>1%</td>
</tr>
<tr>
<td>Panhandle</td>
<td>1%</td>
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<tr>
<td>Panhandle</td>
<td>1%</td>
</tr>
<tr>
<td>Tallahassee</td>
<td>0%</td>
</tr>
<tr>
<td>NONE—The St. …</td>
<td>42%</td>
</tr>
</tbody>
</table>

Base: 2021 - March 425 responses.
Method of Arrival / Arrival Airport & Airline

Method of Arrival

- Personal vehicle: 57%
- Airline: 42%
- Rental vehicle: 8%
- Rideshare (Uber, Lyft, etc.): 2%
- RV: 1%
- Train: 0%
- Taxi or limo: 0%
- Tour bus: 0%
- Public bus: 0%
- Other: 0%

Method of Departure

- Personal vehicle: 48%
- Airline: 42%
- Rental vehicle: 14%
- Rideshare (Uber, Lyft, etc.): 4%
- RV: 1%
- Train: 0%
- Taxi or limo: 0%
- Tour bus: 0%
- Public bus: 0%
- Other: 1%

Base: 2021 - March 425 responses.
**Method of Arrival / Arrival Airport & Airline**

**Airport of Arrival**

- Tampa Int'l.: 52%
- St. Pete-Clearwater Int'l.: 36%
- Orlando Int'l.: 8%
- Sarasota/Bradenton Int'l.: 2%
- Miami Int'l.: 1%
- SW Fl Int'l. (Ft. Myers): 0%
- Ft. Lauderdale Int'l.: 0%
- Palm Beach Int'l.: 0%
- Sanford Int'l.: 0%
- Jacksonville Int'l.: 0%
- Other: 0%

**Airline Used by Airport of Arrival**

- Allegiant: 1%
- Southwest: 26%
- Delta Airlines: 19%
- American Airlines: 18%
- United: 14%
- Jet Blue: 7%
- Sun Country: 2%
- Alaska Airlines: 1%
- Other: 12%

Base: 2021 - March 425 responses.
**Travel Party Composition / Travel Party Size**

### Travel Party Composition
- Solo: 12%
- Couple: 48%
- Immediate Family: 34%
- Extended Family: 0%
- Group of Couples: 4%
- Group of Friends: 10%
- Tour Group: 0%
- Business Associates: 0%
- Other: 0%

### Travel Party Size
- Female adults (18 yrs. +)
- Male adults (18 yrs. +)
- Male children (0 to 17 yrs.)
- Female children (0 to 17 yrs.)

**Avg Travel Party Size = 2.7**
**Percent with Children = 22.8%**

Base: 2021 - March 425 responses.
Important Factors to Destination Decision / Trip Activities

**Important to Decision to Visit**
- Weather: 42%
- Beaches that suit my tastes: 37%
- Attractions in the area: 29%
- Friends or family in the area: 29%
- Scenic beauty: 28%
- Easy to get to: 25%
- Restaurants, cuisine, food scene: 23%
- Overall ambiance & atmosphere: 21%
- Arts & cultural offerings: 17%
- Outdoor recreational opportunities: 16%
- Shopping opportunities: 13%
- Recommendation from people I…: 13%
- A specific attraction: 11%
- St. Pete Pier: 10%
- The SPC area is romantic: 5%

**Trip Activities**
- Dining in restaurants: 95%
- Visit the beach: 74%
- Shopping: 60%
- Visit museums: 36%
- Swimming: 32%
- Visit friends or family: 27%
- Other boating: 17%
- Guided tour: 17%
- Photography: 16%
- Bars/Nightlife: 8%
- Shelling: 8%
- Fishing: 6%
- Parasailing: 5%
- Golf: 4%
- Biking: 4%

Base: 2021 - March 425 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: 23%
- 1 - 10 Previous Visits: 49%
- 11 - 20 Previous Visits: 10%
- More than 20 Visits: 18%

**Mean # of Past Trips =** 20.5

Base: 2021 - March 425 responses.
Attractions Visited / Communities Visited

Attractions Visited

- St. Pete Pier: 17%
- Chihuly Exhibit: 13%
- Clearwater Marine Aquarium: 10%
- Tarpon Springs: 9%
- Dali Art Museum: 8%
- Sunken Gardens: 8%
- Ft. Desoto Park: 5%
- Orlando area Theme Parks: 3%
- Florida Aquarium in Tampa: 2%
- Tampa Bay Rays game/Tropicana Field: 2%
- Other: 6%
- NONE OF THESE: 45%

Communities Visited

- Clearwater Beach: 42%
- St. Petersburg: 40%
- Madeira Beach: 33%
- St. Pete Beach: 23%
- Treasure Island: 15%
- Tarpon Springs: 11%
- Indian Shores & Indian Rocks Beach: 10%
- Clearwater: 9%
- Dunedin: 7%
- North Redington Beach/Redington Shores: 6%
- Gulfport: 5%
- Pass-A-Grille Beach: 5%
- Largo: 5%
- Pinellas Park: 3%
- Seminole: 3%

Base: 2021 - March 425 responses.
Most Liked Aspects of SPC (Unaided)

- Beaches / Ocean: 61%
- Tropical Climate / Warm Weather: 42%
- Scenic Beauty: 24%
- Entertainment / Variety of Fun Attractions (Museums,…) : 18%
- Food / Restaurants & Bars: 14%
- Everything: 10%
- Accessible / Convenient /…: 10%
- Friendly People: 7%
- Clean: 5%
- Shopping: 5%
- Relaxing Atmosphere / Ambiance: 5%
- Great Location / Easy to get to: 4%
- Family Friendly: 3%
- Safe: 1%

Feelings in SPC Area (Unaided)

- Calm / Relaxed: 55%
- Happy: 26%
- Amazing: 11%
- Fine / Good: 6%
- Refreshed / Healthy: 5%
- Energized / Excited: 2%
- Entertained: 2%
- Warm: 2%
- Free: 1%
- Comfortable: 1%

Attractions or Services that Would Enhance the Destination Experience

Additional Attractions or Services (Unaided)

- It needs no improvement: 82%
- Cheaper & More Parking: 11%
- Less congestion / traffic: 5%
- More Affordable: 2%
- More Public Transportation: 2%
- More shaded / green areas: 1%
- Tourist Information: 1%
- Better Signage /accessibility: 0%
- Clean it up: 0%
- More public restrooms: 0%
- Bars and food options on the…: 0%
- Better Nightlife: 0%
- More Shopping: 0%
- Finish the Pier: 0%
- Restaurant Diversity: 0%

Base: 2021 - March 425 responses.
When Decision to Visit was Made / Travel Planning Resources Used

- Average Time Between Decision to Visit and Arrival: **65.4 Days in Advance**

### Resources Used before Arrival and While In Market

- **User-generated content/Review websites, such as Yelp and TripAdvisor:** 48%
- **Opinions of friends or relatives:** 35%
- **Online travel agencies (Expedia, Travelocity, etc.):** 34%
- **Social Media content:** 19%
- **Official St. Petersburg/Clearwater area tourism website, www.VisitStPeteClearwater.com:** 11%
- **Travel guides, brochures:** 11%
- **Television programming:** 7%
- **Radio programming:** 2%
- **Lifestyle or travel magazines:** 1%
- **Gulf to Bay St. Pete/Clearwater Destination Magazine:** 1%
- **Travel agency (traditional, offline):** 1%
- **Newspaper travel section:** 1%
- **YouTube or other online videos:** 1%

### Base:
- 2021 - March 425 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: 42%
- No: 54%
- Maybe/Not sure: 5%
Likelihood to Recommend / Likelihood to Return

Likelihood to Recommend: 9.8 / 10
Likelihood to Return: 9.6 / 10

Base: 2021 - March 425 responses.
Demographics

- **Gender**
  - Female: 75%
  - Male: 25%
  - Other: 0%
  - I prefer not to answer: 0%

- **Marital Status**
  - Single: 18%
  - Single with children under 18: 3%
  - Married/partnered: 50%
  - Married/partnered with children under 18: 22%
  - Other: 6%
  - I prefer not to answer: 1%

- **Ethnicity**
  - Caucasian: 89%
  - Latino/Hispanic: 4%
  - Black/African-American: 4%
  - Asian/Pacific Islander: 0%
  - American Indian/Alaska Native: 2%
  - Other: 0%
  - I prefer not to answer: 0%

- **Sexual Orientation**
  - Heterosexual: 99%
  - LGBTQ: 1%
  - Other: 0%
  - I prefer not to answer: 1%

- **Average Age**: 52.1
- **Average Income**: $113,363

**Base**: 2021 - March 425 responses.
Visit St. Pete Clearwater
Visitor Profile Study

Infographic Profile: 2021 - March 425 responses.
Infographic Profile: 2021 - March 425 responses.

Domestic vs. International
- United States Resident: 99.6%
- International Visitor: 0.4%

Point of Origin: Top States
- Florida: 28.1%
- Illinois: 7.6%
- Ohio: 7.6%

Factors Important to Destination Decision
- Weather: 42.1%
- Beaches that suit my tastes: 36.9%
- Attractions in the area: 29.2%
- Friends or family in the area: 28.6%
- Scenic beauty: 27.5%
- Easy to get to: 24.8%
**Infographic Profile: 2021 - March 425 responses.**

### Seasonality of Visit

<table>
<thead>
<tr>
<th>Month</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Jan-Mar</td>
<td>100.0%</td>
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<tr>
<td>Apr-Jun</td>
<td>0.0%</td>
</tr>
<tr>
<td>Jul-Sept</td>
<td>0.0%</td>
</tr>
<tr>
<td>Oct-Dec</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

### Travel Party Size

- **2.7 People**
- **22.8% Traveled with Children**

### Daily Spending

- **$301.76 Per Person**

### Top Communities Visited

<table>
<thead>
<tr>
<th>Community</th>
<th>Percentage</th>
</tr>
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<tbody>
<tr>
<td>Clearwater Beach</td>
<td>51.3%</td>
</tr>
<tr>
<td>Madeira Beach</td>
<td>41.4%</td>
</tr>
<tr>
<td>St. Petersburg</td>
<td>37.2%</td>
</tr>
<tr>
<td>St. Pete Beach</td>
<td>28.2%</td>
</tr>
<tr>
<td>Treasure Island</td>
<td>20.7%</td>
</tr>
</tbody>
</table>

### Top Activities

- **Dining in Restaurants**: 94.8%
- **Visit the beach**: 74.0%
- **Shopping**: 59.9%
- **Visit museums**: 36.1%