ST.PETE CLEARWATER

Visit St. Pete/Clearwater

VISITOR PROFILE STUDY

Report of Findings
Q2 2021

Research prepared for Visit St. Pete/Clearwater by:

Destination Analysts

Destination Analysts

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Research Overview & Methodology

This report presents the quarterly 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 interim report presents the top-line survey data collected from visitors surveyed between April 2021 — June 2021.

The data presented for all visitors is weighted based on the relative proportion of lodging guests, home share, VFR and day trip visitors observed in survey locations OUTSIDE lodging properties. Secondary inputs such as total hotel room inventory and average occupancy were also used in calculating these weights.

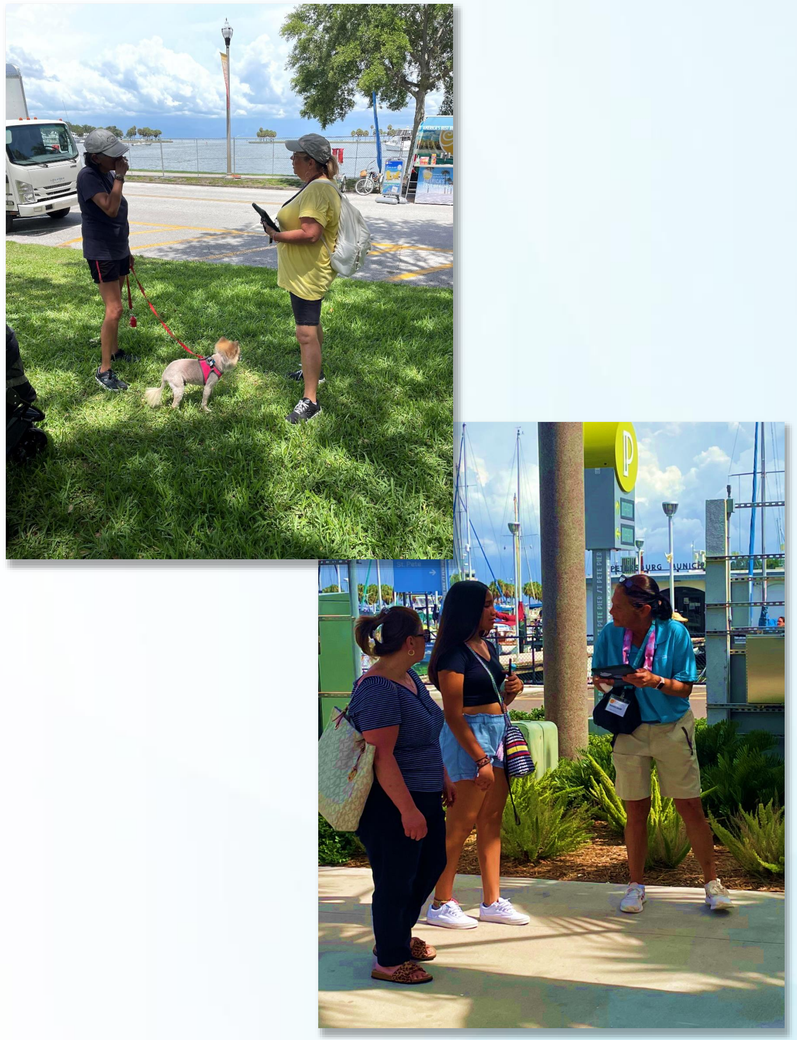
In total, 1,395 completed surveys from Pinellas County visitors were collected.

Above: *Images of the St. Pete/Clearwater area. Courtesy of Instagram.com/vspc.*

Research Overview & Methodology

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:

- Chihuly Collection
- Clearwater Beach
- Clearwater Marine Aquarium
- Dunedin
- Firestone Grand Prix
- 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

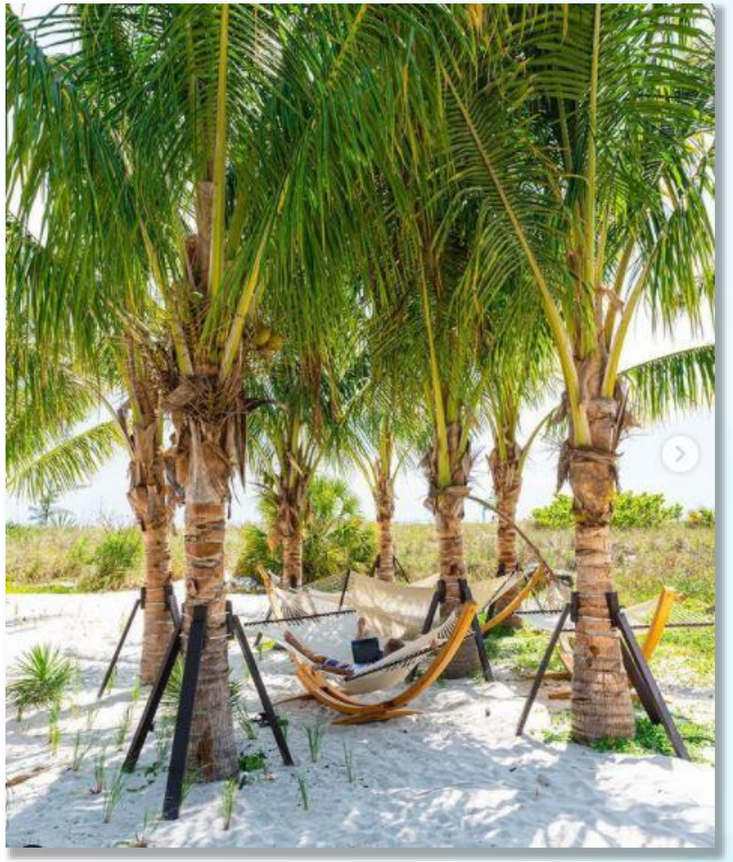


Above: *Destination Analysts Field Research Team*

Research Objectives

The overarching goal of this survey-based research is to create in-depth profiles of Pinellas County visitors, including:

- Travel planning resources used by St. Pete/Clearwater area visitors
- 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. Pete/Clearwater area
- Evaluation of St. Pete/Clearwater brand attributes
- Detailed visitor spending estimates
- Visitor satisfaction
- Visitor demographics



Above: *Images of the St. Pete/Clearwater area. Courtesy of Instagram.com/vspc.*

Q2 2021
Economic Impact Analysis

Economic Impact: Definitions

The following key definitions related to economic impact are used in this report.

- **Direct visitor spending –** The injection of money into the local economy that takes place when a visitor purchases any good or service inside Pinellas County.
- **Total economic impact –** The total change in economic activity in Pinellas County generated by direct spending. This includes direct visitor spending as well as its induced and indirect effects in the county.
- **Tax revenues generated –** Tax revenues flowing to government coffers as a result of direct visitor spending.
- **Hotel room nights –** The estimated number of hotel room nights in Pinellas County generated by visitors.
- **Indirect effects –** Changes in inter-industry transactions when supplying industries respond to increased demands from the directly affected industries (e.g., impacts from non-wage expenditures).
- **Induced effects –** Changes in local spending that result from income changes in the directly and indirectly affected industry sectors (e.g., impacts from wage expenditures; the subsequent round of spending in the local economy made by the households of the employees of companies that incur both direct and indirect expenditures).

Above: *Images of the St. Pete/Clearwater area. Courtesy of Instagram.com/vspc.*

Economic Impact: Definitions

- **Hotel guests** – Pinellas County visitors who stayed overnight in a Pinellas County hotel, motel, resort or inn.
- **Visiting friends/relatives (VFRs)** – Pinellas County visitors who stayed overnight in the private residence of a friend or family member who lives in Pinellas County.
- **Vacation rental guests** – Pinellas County visitors who stayed overnight in a condo, vacation home or other private home rental in Pinellas County.
- **Day trip visitors (regional)** – Pinellas County visitors who came for the day and reside in the regional area surrounding Pinellas County.
- **Day trip visitors (travelers)** – Pinellas County visitors who came for the day, stayed overnight outside Pinellas County and reside outside the regional area surrounding the county.
- **Peer-to-peer home share guests** – Pinellas County visitors who stayed overnight in a home share rental in Pinellas County booked through AirBnB, VRBO or similar.
- **Other** – Pinellas County visitors who stayed overnight in other types of lodging.

Above: *Images of the St. Pete/Clearwater area courtesy of Instagram.com/vspc.*

Economic Impact Estimates: Key Findings – Q2 2021

The following presents the key findings related to the economic impact of tourism to Pinellas County from April 2021 – June 2021.

	April 2021	May 2021	June 2021	April 2021 – June 2021
Visitors to Pinellas County	1,369,254	1,246,469	1,351,232	3,966,955
Direct Visitor Spending in Pinellas County	$519,025,570	$489,011,274	$511,896,891	$1,519,933,735
Total Economic Impact of Tourism to Pinellas County	$850,874,445	$804,951,802	$840,995,050	$2,496,821,297
Tax Revenues Generated for Pinellas County	$34,292,406	$32,250,935	$33,701,645	$100,244,986
Hotel Room Nights	575,892	558,625	568,835	1,703,351
Visitor Industry Payroll	$271,501,223	$256,240,283	$268,475,647	$796,217,153
Jobs Supported	8,487	7,972	8,379	24,837

Economic Impact YOY Comparison

The following presents the estimated economic impact of tourism to Pinellas County comparing Q2 2021 (April - June) and Q2 2020.

- **In this second quarter of 2021, the travel and tourism industry nation wide continued its recovery from the effects and impacts of the COVID-19 pandemic.** Pinellas County led the rest of the country in terms of average hotel occupancy and in-market activity by visitors throughout the quarter. Compared to Q2 of 2020, which was the most impacted by the pandemic, estimated visitor volume to Pinellas County for the quarter was up 155.1 percent and total economic impact is estimated to be up 196.2 percent.

- Compared to Q2 of 2019 as a pre-COVID benchmark, volume is down 7.4 percent in the quarter, but visitor spending and total economic impact are both up about 2.0 percent from what was seen in 2019. The most significant growth over 2019 is in taxes generated during the quarter (up about 11.0%) largely due to the record levels of hotel taxes generated this quarter due to the significant increase in ADR seen across the county.

	April 2020	April 2021	% Change	May 2020	May 2021	% Change	June 2020	June 2021	% Change	Q2 2020 (April 2020 – June 2020)	Q2 2021 (April 2021 – June 2021)	% Change
Visitors to Pinellas County	278,328	1,369,254	↑ 392.0%	556,629	1,246,469	↑ 123.9%	720,173	1,351,232	↑ 87.6%	1,555,130	3,966,955	↑ 155.1%
Direct Visitor Spending in Pinellas County	$98,679,651	$519,025,570	↑ 426.0%	$190,998,331	$489,011,274	↑ 156.0%	$222,985,319	$511,896,891	↑ 129.6%	$512,663,301	$1,519,933,735	↑ 196.5%
Total Economic Impact of Tourism to Pinellas County	$163,014,438	$850,874,445	↑ 422.0%	$316,912,838	$804,951,802	↑ 154.0%	$362,961,156	$840,995,050	↑ 131.7%	$842,888,432	$2,496,821,297	↑ 196.2%
Tax Revenues Generated for Pinellas County	$5,306,368	$34,292,406	↑ 546.3%	$11,744,682	$32,250,935	↑ 174.6%	$14,891,307	$33,701,645	↑ 126.3%	$31,942,357	$100,244,986	↑ 213.8%
Hotel Room Nights	111,184	575,892	↑ 418.0%	257,688	558,625	↑ 116.8%	328,387	568,835	↑ 73.2%	697,259	1,703,351	↑ 144.3%
Visitor Industry Payroll	$52,361,892	$271,501,223	↑ 418.5%	$101,531,493	$256,240,283	↑ 152.4%	$116,866,006	$268,475,647	↑ 129.7%	$270,759,391	$796,217,153	↑ 194.1%
Jobs Supported	1,654	8,487	↑ 413.1%	3,174	7,972	↑ 151.2%	3,678	8,379	↑ 127.8%	8,506	24,837	↑ 192.0%

Economic Impact YOY Comparison

Due to the significant differences seen in the comparison to 2020 the table below shows a comparison of Q2 2021 (April - June) and Q2 2019.

	April 2019	April 2021	% Change	May 2019	May 2021	% Change	June 2019	June 2021	% Change	Q2 2019 (April 2019 – June 2019)	Q2 2021 (April 2021 – June 2021)	% Change
Visitors to Pinellas County	1,514,030	1,369,254	↓ -9.6%	1,315,797	1,246,469	↓ -5.3%	1,452,636	1,351,232	↓ -7.0%	4,282,463	3,966,955	↓ -7.4%
Direct Visitor Spending in Pinellas County	$528,499,413	$519,025,570	↓ -1.8%	$467,322,163	$489,011,274	↑ 4.6%	$481,356,011	$511,896,891	↑ 6.3%	$1,477,177,587	$1,519,933,735	↑ 2.9%
Total Economic Impact of Tourism to Pinellas County	$875,442,701	$850,874,445	↓ -2.8%	$772,332,415	$804,951,802	↑ 4.2%	$799,643,910	$840,995,050	↑ 5.2%	$2,447,419,026	$2,496,821,297	↑ 2.0%
Tax Revenues Generated for Pinellas County	$32,763,690	$34,292,406	↑ 4.7%	$28,125,482	$32,250,935	↑ 14.7%	$29,382,397	$33,701,645	↑ 14.7%	$90,271,569	$100,244,986	↑ 11.0%
Hotel Room Nights	620,940	575,892	↓ -7.3%	606,889	558,625	↓ -8.0%	595,914	568,835	↓ -4.5%	1,823,743	1,703,351	↓ -6.6%
Visitor Industry Payroll	$280,447,074	$271,501,223	↓ -3.2%	$248,358,981	$256,240,283	↑ 3.2%	$257,117,450	$268,475,647	↑ 4.4%	$785,923,505	$796,217,153	↑ 1.3%
Jobs Supported	8,822	8,487	↓ -3.8%	7,810	7,972	↑ 2.1%	8,079	8,379	↑ 3.7%	24,710	24,837	↑ 0.5%

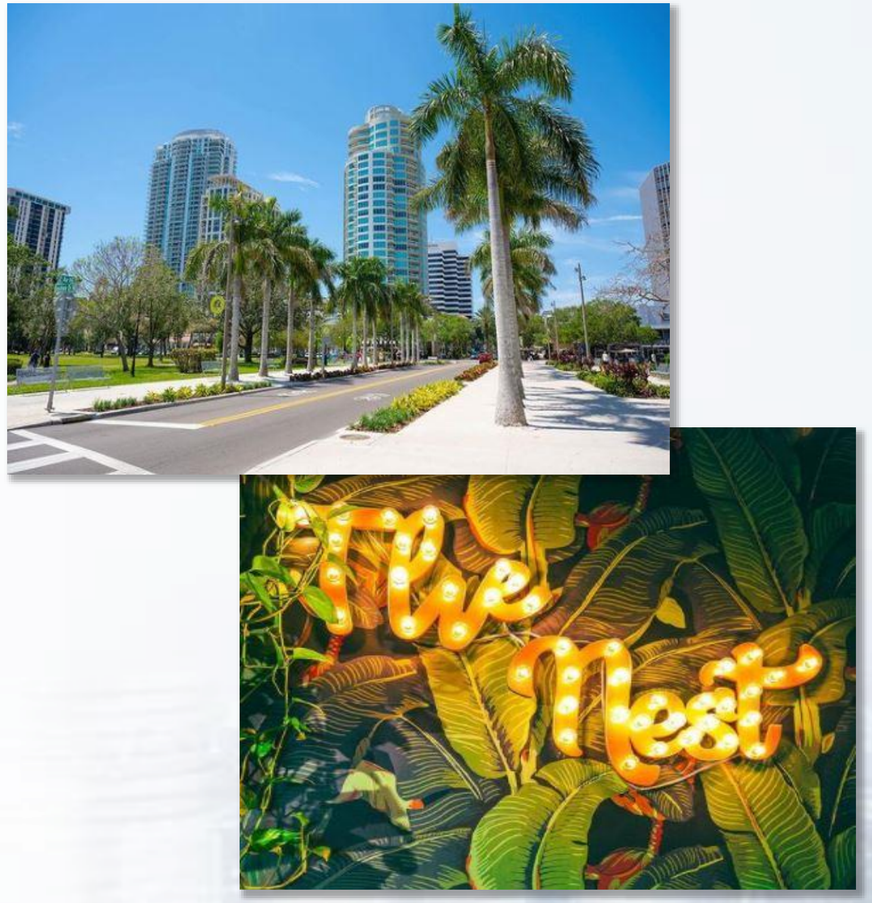
Economic Impact Estimates: Summary of Key Findings

The following presents a summary of key findings related to the economic impact of tourism to Pinellas County from April 2021 – June 2021

- **Visitors to Pinellas County** - Pinellas County had a total of 3.9 million visitors between April 2021 – June 2021. The largest segment of Pinellas County's visitor volume this quarter is day trip visitors from within the surrounding region, comprising 1.3 million visitors, or 34 percent of all visitors.

- **Direct Visitor Spending in Pinellas County** - The Pinellas County tourism industry generated $1.5 billion in direct visitor spending inside the county from April 2021 – June 2021. Over forty percent of this spending was generated by hotel guests who stayed overnight in commercial lodging. These visitors were responsible for $789 million in visitor spending, or 52 percent of the total.

- **Total Economic Impact of Tourism to Pinellas County** – Tourism generated a total of $2.5 billion in economic impact for Pinellas County during April 2021 – June 2021. The total economic impact is comprised of direct visitor spending, as well as indirect and induced effects.



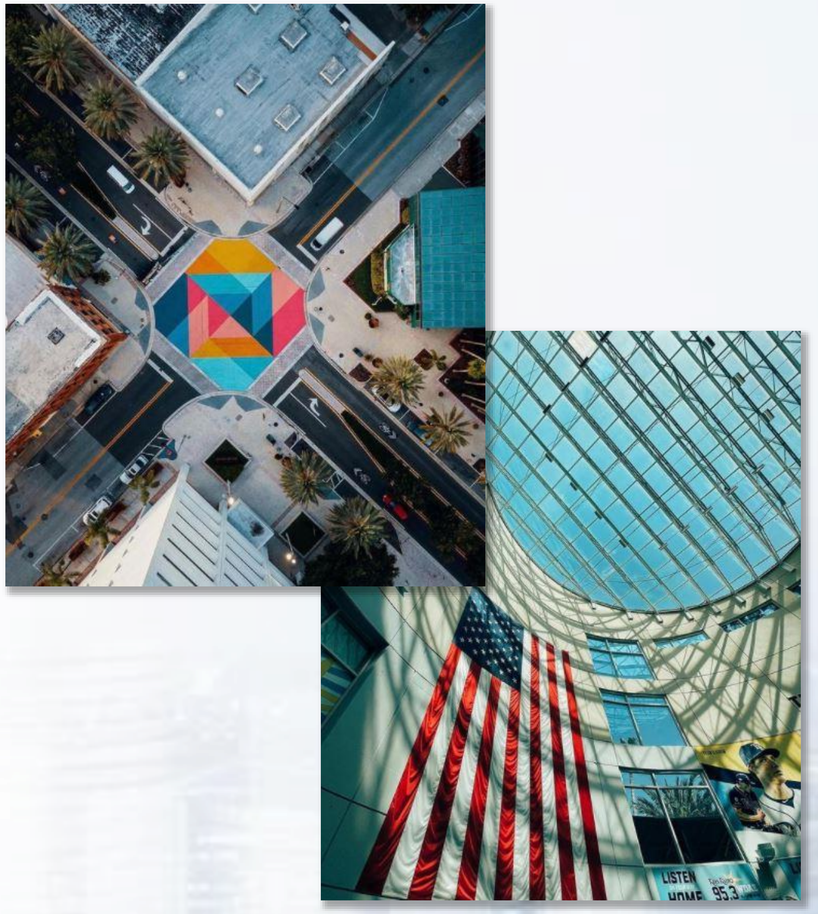
Above: *Images of the St. Pete/Clearwater area. Courtesy of Instagram.com/vspc.*

Economic Impact Estimates: Summary of Key Findings

- **Tax Revenues Generated for Pinellas County** – Pinellas County's tourism industry generated $100.2 million in tax revenues for governmental entities from April 2021 – June 2021. Taxes directly generated by the visitor industry include revenues from the transient occupancy tax (hotel tax), sales taxes and property taxes paid on lodging facilities.

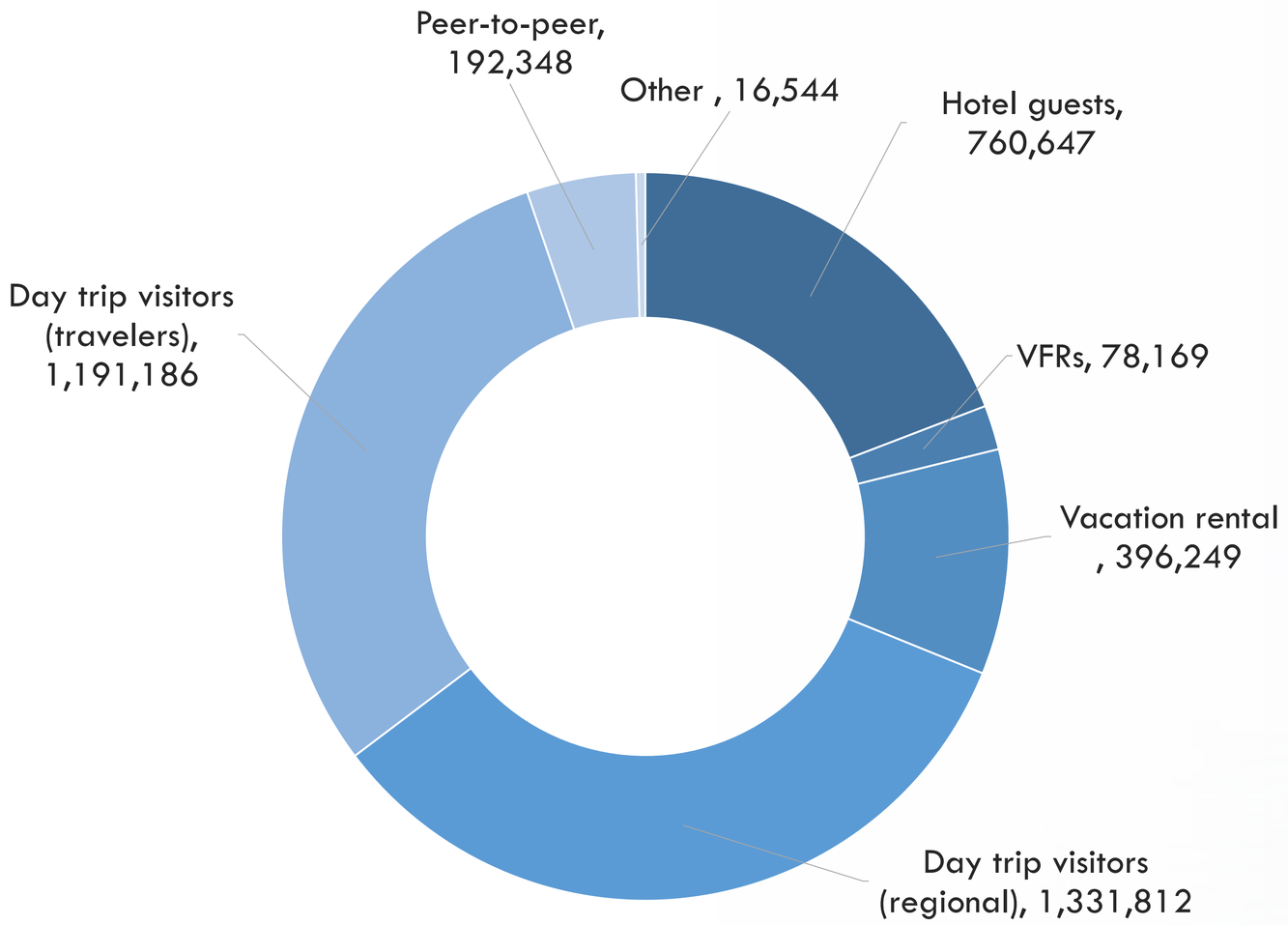
- **Hotel Room Nights** – Between April 2021 – June 2021, an estimated 1,703 thousand hotel room nights were generated in Pinellas County by visitors.

- **Visitor Industry Payroll and Jobs supported** – Between April 2021 – June 2021, the Pinellas County tourism industry had an estimated total combined payroll of $796 million. This is estimated to have supported 24,837 jobs.



Above: *Images of the St. Pete/Clearwater area. Courtesy of Instagram.com/vspc.*

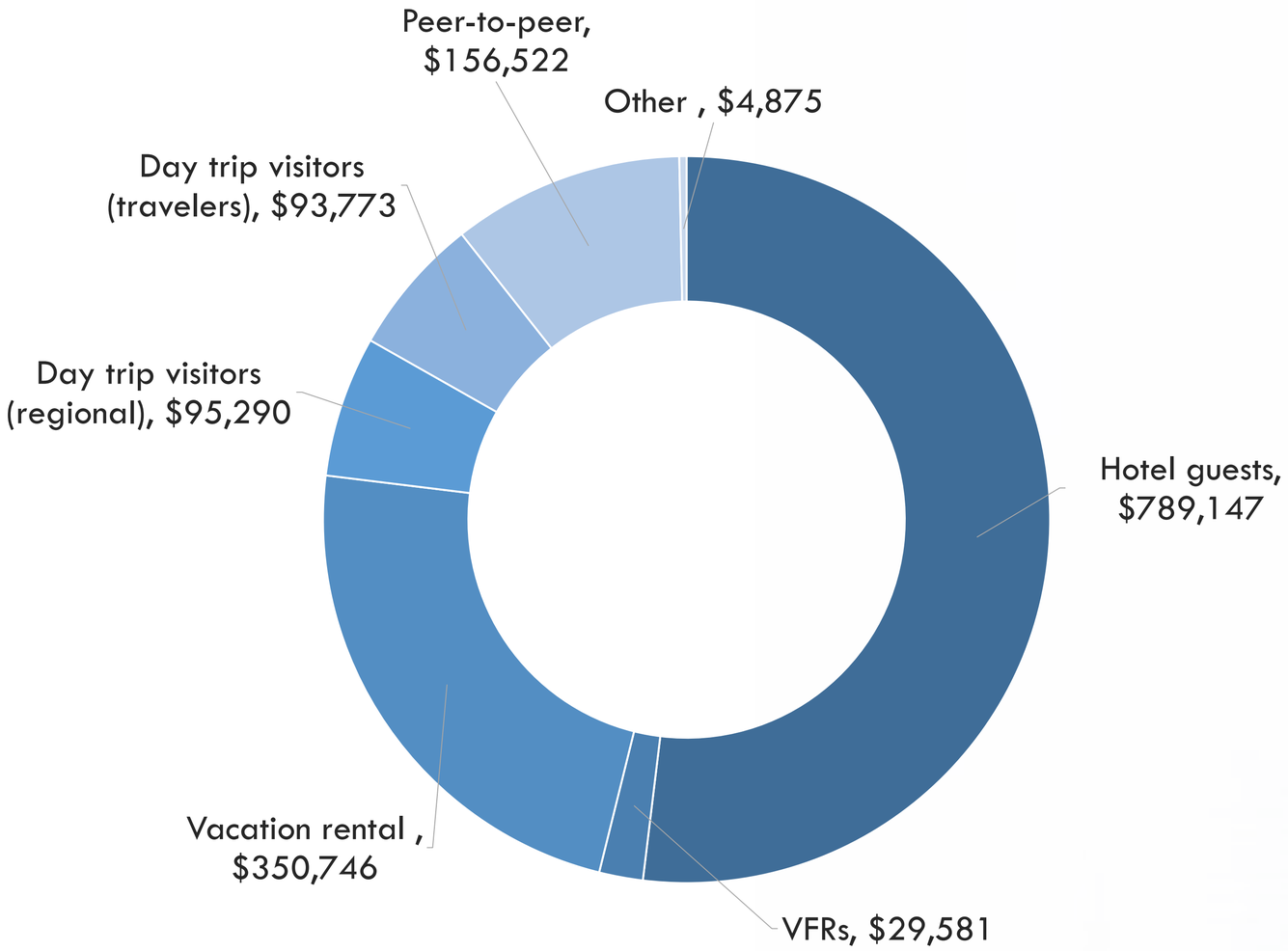
Visitors to Pinellas County



Visitors to Pinellas County, by type of visitor

Hotel guests	760,647
VFRs	78,169
Vacation rental	396,249
Day trip visitors (regional)	1,331,812
Day trip visitors (travelers)	1,191,186
Peer-to-peer	192,348
Other	16,544
TOTAL VISITORS	**3,966,955**

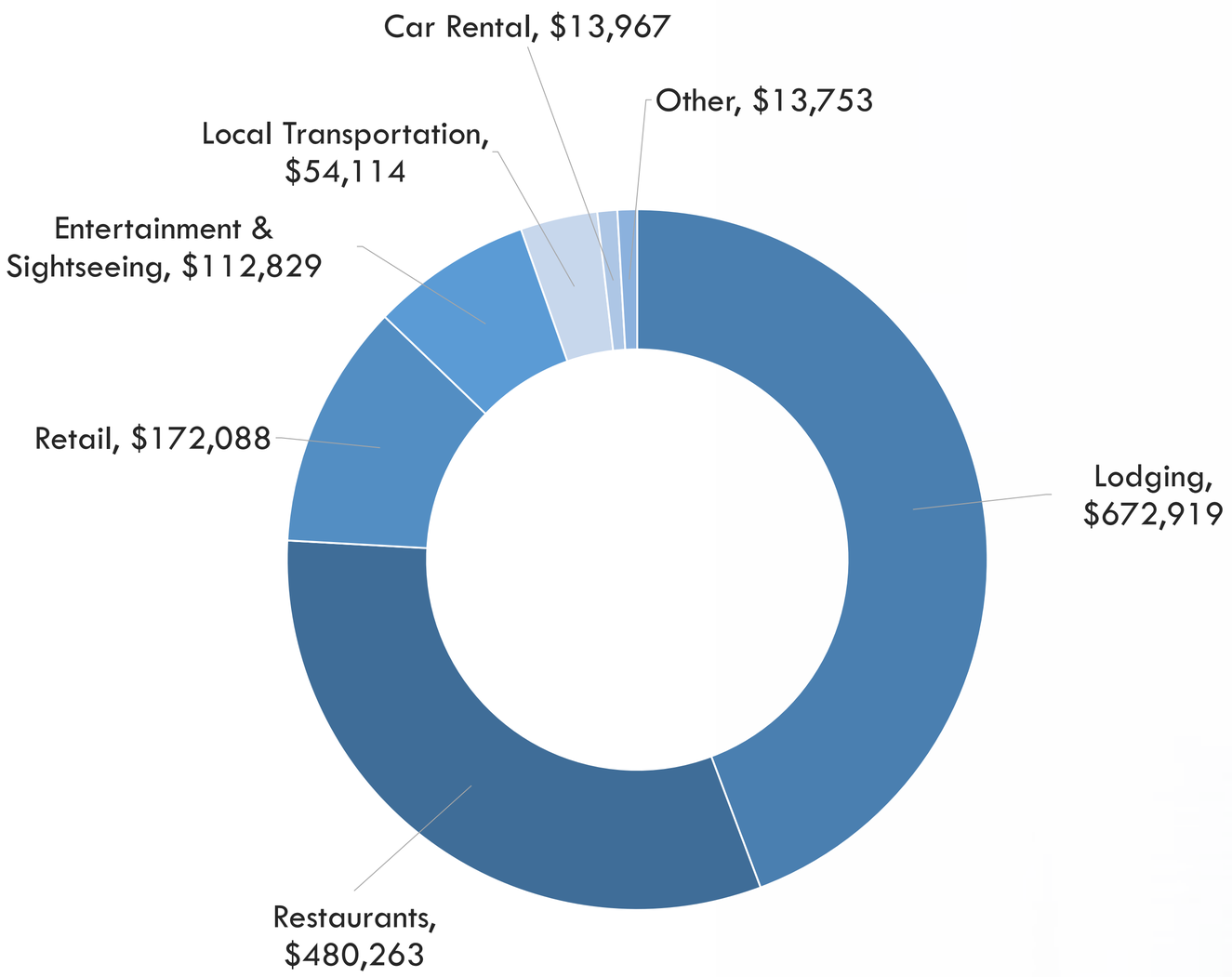
DIRECT VISITOR SPENDING: BY TYPE OF VISITOR



Spending in Pinellas County, by type of visitor (in thousands)

Hotel guests	$789,147
VFRs	$29,581
Vacation rental	$350,746
Day trip visitors (regional)	$95,290
Day trip visitors (travelers)	$93,773
Peer-to-peer	$156,522
Other	$4,875
TOTAL DIRECT VISITOR SPENDING	**$1,519,934**

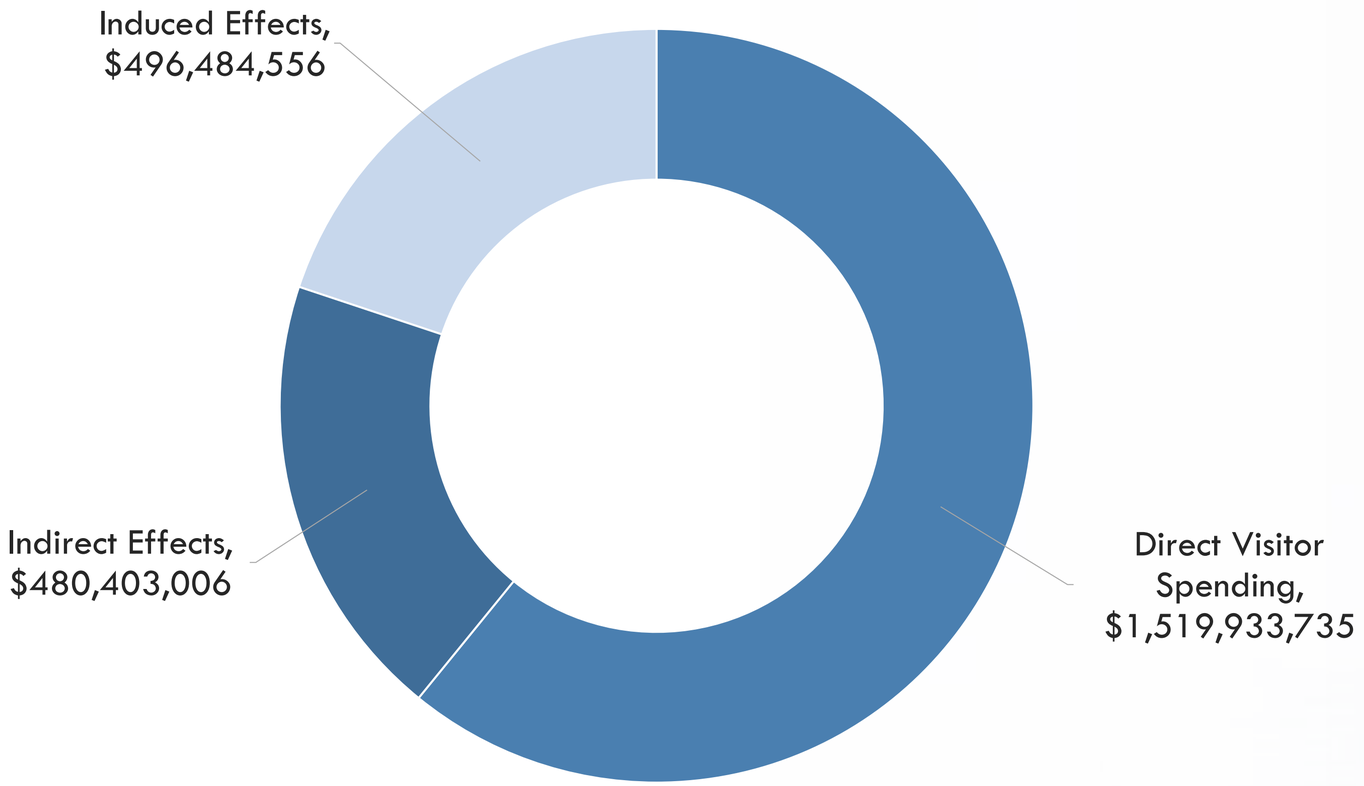
Direct Visitor Spending: By Type of Spending



Spending in Pinellas County, by type of spending (in thousands)

Lodging	$672,919
Restaurants	$480,263
Retail	$172,088
Entertainment & Sightseeing	$112,829
Local Transportation	$54,114
Car Rental	$13,967
Other	$13,753
TOTAL DIRECT VISITOR SPENDING	**$1,519,934**

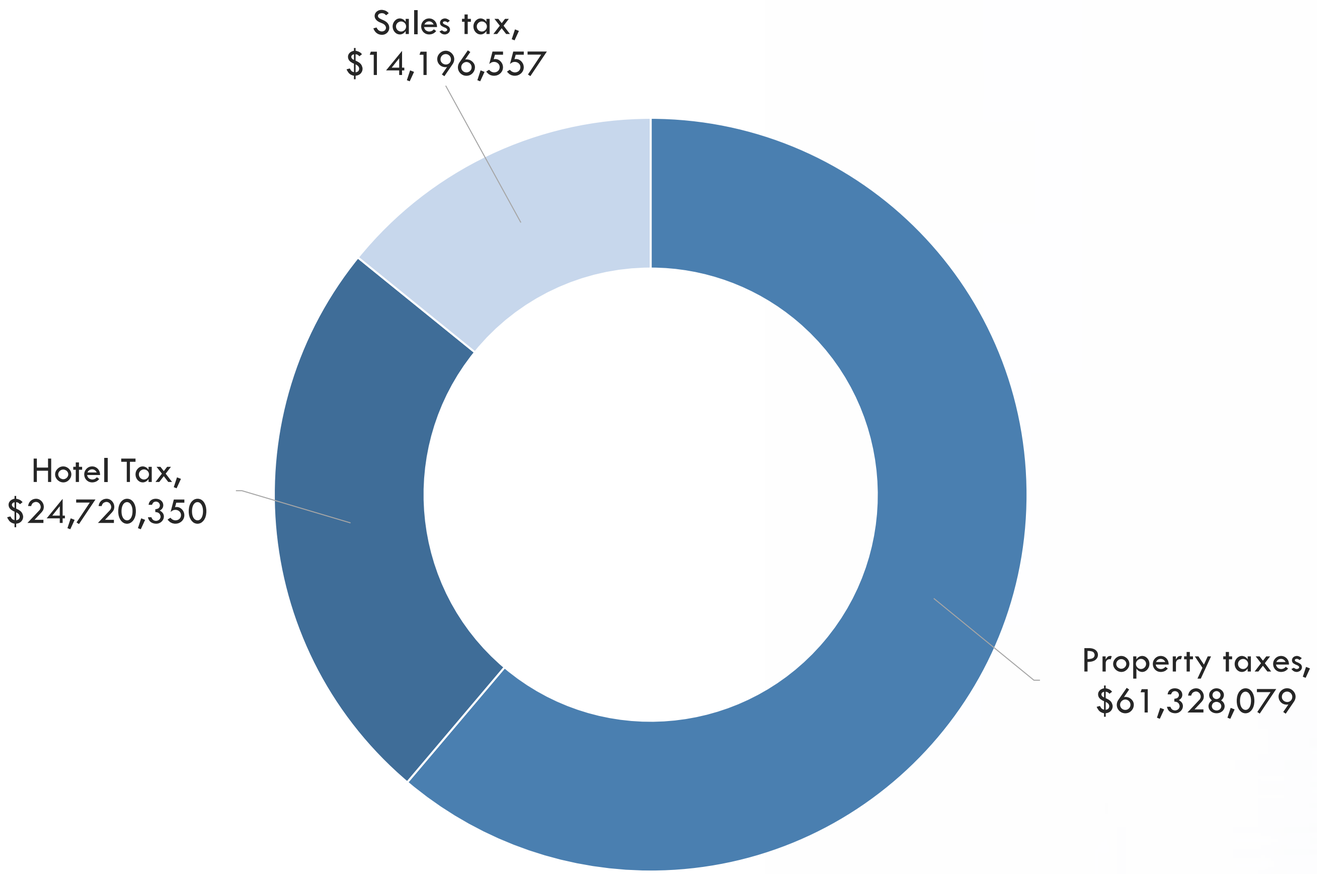
Total Economic Impact



Economic Impact Estimates, by type of effect

Direct Visitor Spending	$1,519,933,735
Indirect Effects	$480,403,006
Induced Effects	$496,484,556
TOTAL ECONOMIC IMPACT	**$2,496,821,297**

Tax Revenues Generated



Tax Revenues Generated, by type of tax

Property taxes	$61,328,079
Hotel Tax	$24,720,350
Sales tax	$14,196,557
TOTAL TAX REVENUES GENERATED	**$100,244,986**

Q2 2021 St. Pete/Clearwater Visitor Summary

This section includes:

- *Q2 2021 Comparison to Past 4 Quarters*
- *Q2 2021 Comparison to Q2 2019 and Q2 2018*

Key Differences This Quarter

- Multiple target visitor segments are recovering to their pre-pandemic levels suggesting a broad return to travel.
  - In Q2 2021, 19.2 percent of visitors fell into the "Arts & Culture Visitor" segment compared to 0.1% (2020), 20.2% (2019), 21.9% (2018). There are promising signs across the "Beach Goer" (31.8% in 2021, 40.6% in 2020, 31.4% in 2019), "Affluent" (11.6% in 2021, 6.9% in 2020, 9.7% in 2019), and "Family Traveler" (20.8% in 2021, 42.5% in 2020, 22.8% in 2019) suggesting travel to St. Peter Clearwater is not isolated to one group but rather travel is recovering across multiple target market segments.
- Per day spending on accommodation and restaurants purchases is out performing pre-pandemic levels.
  - Q2 Visitor daily spending on paid accommodations and restaurants suggests travelers are more willing to spend coming out of the pandemic.
    - Accommodation daily spending in Q2: $88.51 in 2021, $65.72 in 2020, $69.09 in 2019, and $62.68 in 2018.
    - Restaurant daily spending in Q2: $96.30 in 2021, $85.36 in 2020, $74.35 in 2019, $79.46 in 2018.
  - Other spending areas including retail store purchasing, other entertainment & sightseeing, Gas/parking/local transportation, car rental (in area only), and "other" are showing positive signs of recovery but have no out-performed pre-pandemic spending yet.
  - As overall visitor volume approaches very close to 2019 levels, visitor's reported Q2 2021 spending suggests travelers are ready to spend money they had been saving throughout the pandemic.
- Ease of access is much more important in Q2 2021 compared to previous years suggesting that coming out of the pandemic visitors dealing with tedious travel requirements and confusing health guidance are choosing to visit places they can easily access.
  - "Easy to get to" importance saw a large year-over-year increase: 22.1% in 2021, 3.9% in 2020, 8.1% in 2019, and 4.1% in 2018.

ST. PETE/CLEARWATER VISITOR SUMMARY

Q2 2021 Comparison to Past 4 Quarters

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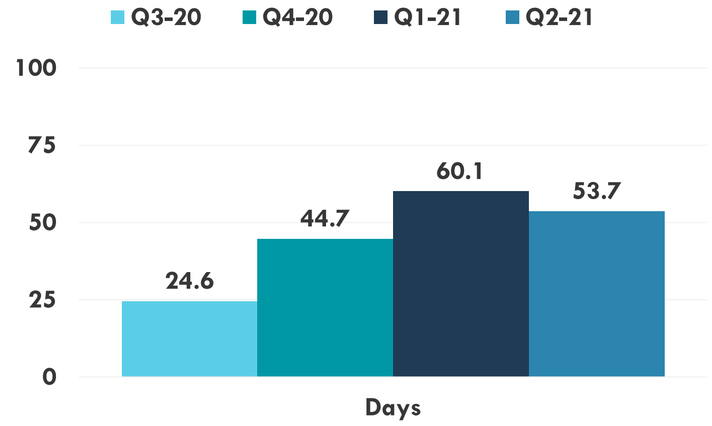
Average Time Between Decision to Visit & Arrival



Average Daily Spending

$274

Q2-21

$208	$242	$268
Q3-20	Q4-20	Q1-21

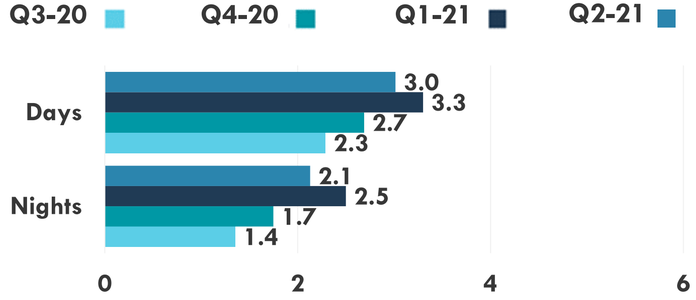
Travel Party Size

2.6

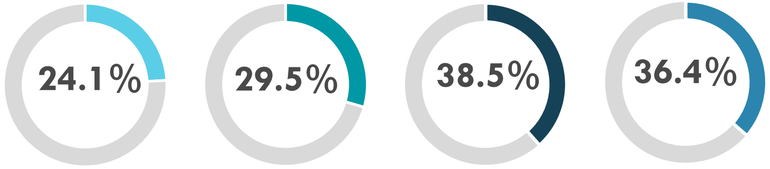
Q2-21

Q3-20	2.6
Q4-20	2.7
Q1-21	2.5

Average Days & Nights

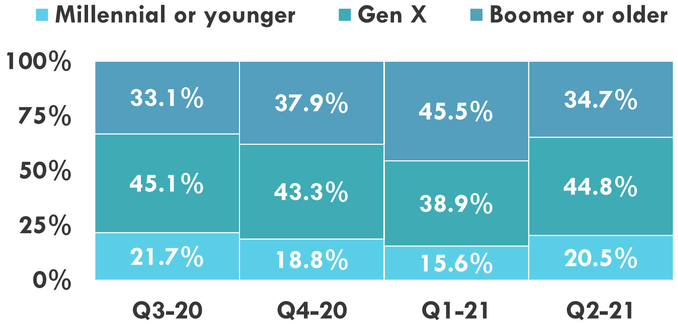


Percent Staying Overnight

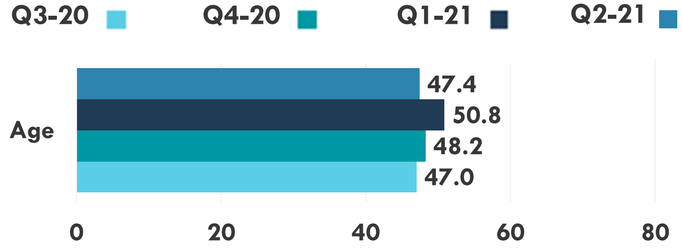


Q3-20 Q4-20 Q1-21 Q2-21

Generations



Average Age



Average Income

$108,907

Q2-21

Q3-20	$90,587
Q4-20	$105,143
Q1-21	$111,830

ST. PETE/CLEARWATER VISITOR SUMMARY *Q2 2021 Comparison to Q2 2019 and Q2 2020*

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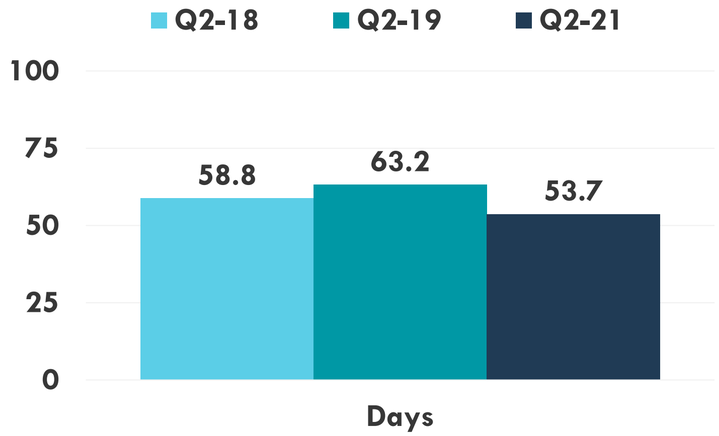
Average Time Between Decision to Visit & Arrival



Average Daily Spending

$274.16
Q2-21

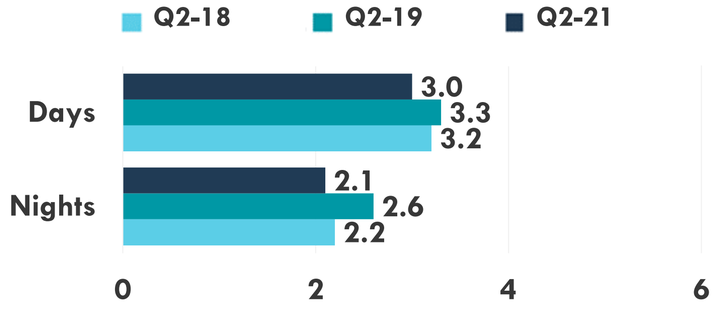
$218.60	$246.73
Q2-19	Q2-18

Travel Party Size

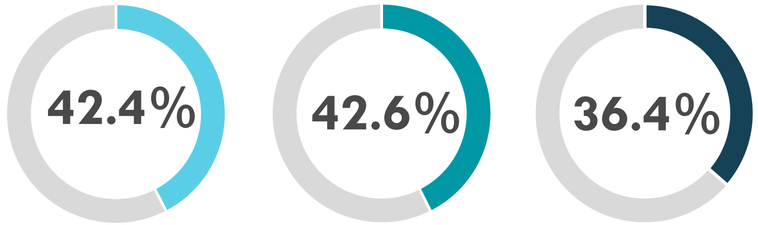
2.6
Q2-21

Q2-19	2.5
Q2-18	2.8

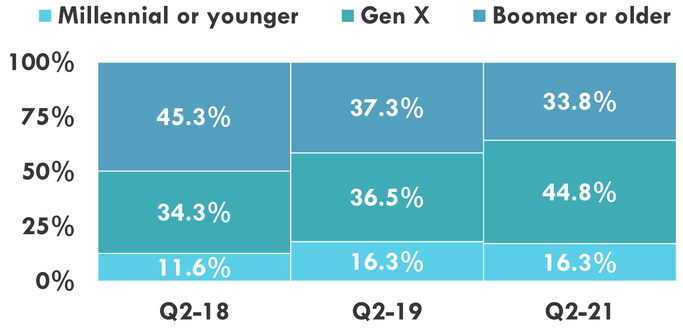
Average Days & Nights



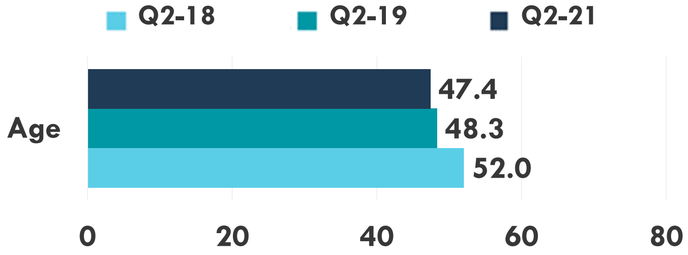
Percent Staying Overnight



Generations



Average Age

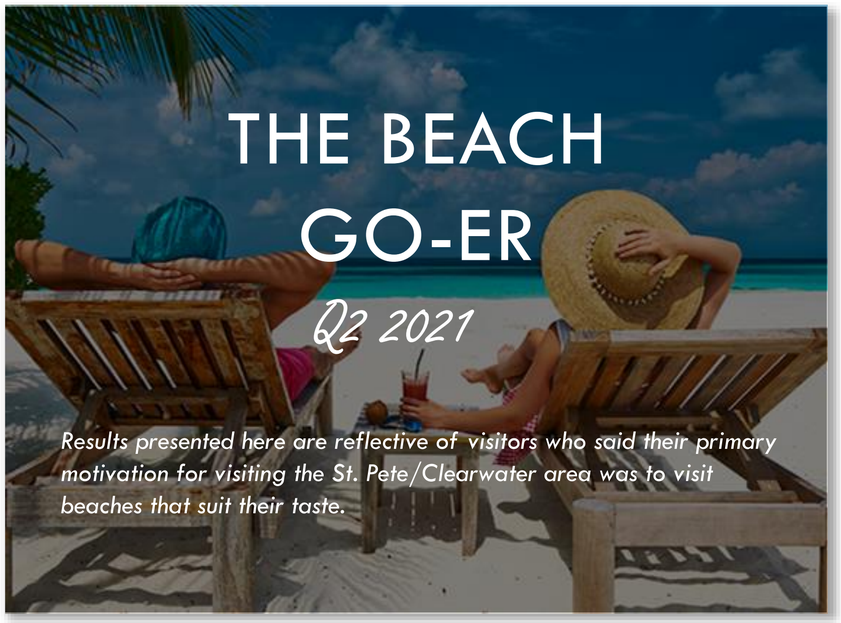


Average Income

$108,907
Q2-21

Q2-19	$93,877
Q2-18	$97,095

Q2 2021
Visitor Summaries
by Traveler Segment

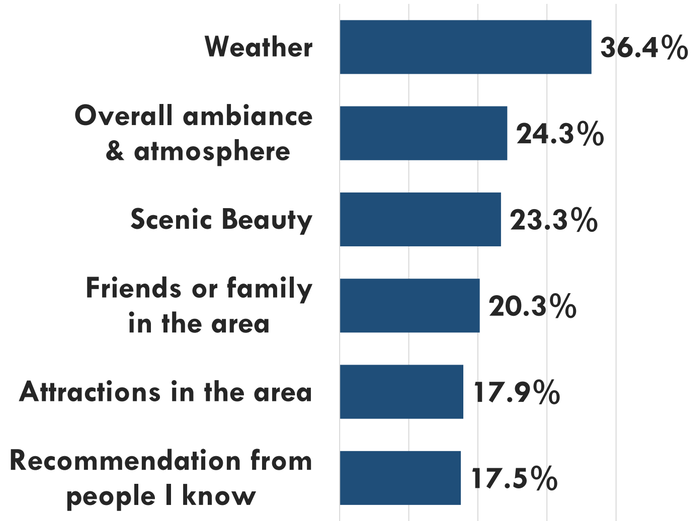


THE BEACH GO-ER

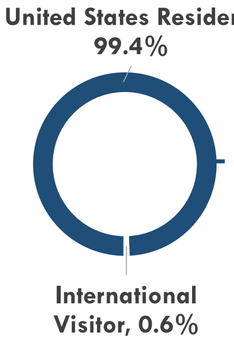
Q2 2021

Results presented here are reflective of visitors who said their primary motivation for visiting the St. Pete/Clearwater area was to visit beaches that suit their taste.

Factors Important to Destination Decision



Domestic vs. International



POINT OF ORIGIN: TOP STATES

Florida	20.6%
Ohio	7.5%
Illinois	6.9%

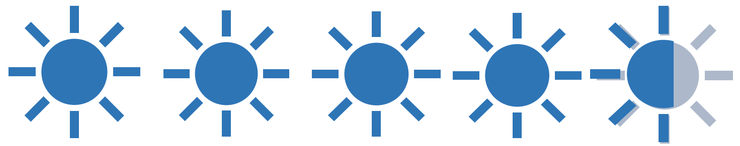
Top Communities Visited

Clearwater Beach	61.2%
Madeira Beach	37.6%
St. Pete Beach	34.4%
St. Petersburg	32.3%
Treasure Island	28.1%

Top Activities

89.3%	67.1%	66.4%	21.8%
Dining in restaurants	Swimming	Shopping	Visit family or friends

Length of Stay



4.6 Days on Average

Travel Party Size

2.9 **People**

27.9% Traveled with Children

Daily Spending

$129.18

Per Person

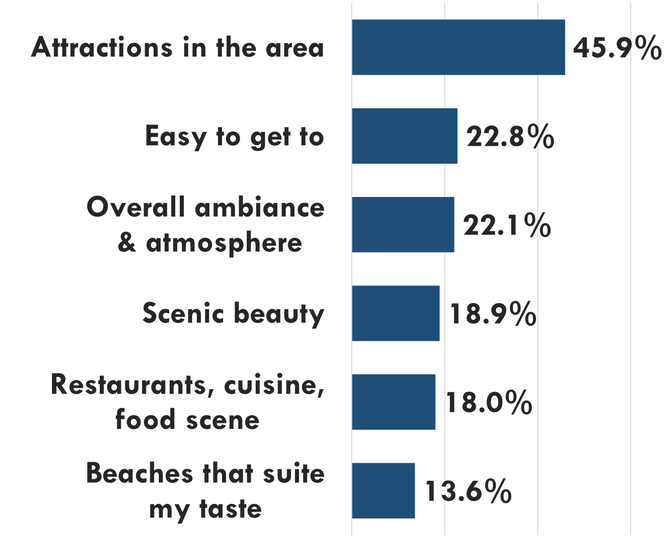
Destination Analysts
DO YOUR RESEARCH

THE ARTS & CULTURE VISITOR

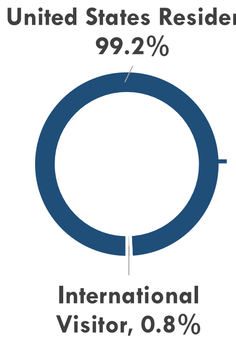
Q2 2021

Results presented here are reflective of visitors who said their primary motivation for visiting the St. Pete/Clearwater area was to engage in arts and cultural offerings.

Factors Important to Destination Decision



Domestic vs. International



POINT OF ORIGIN: TOP STATES

Florida	71.3%
Georgia	4.3%
Indiana	3.3%

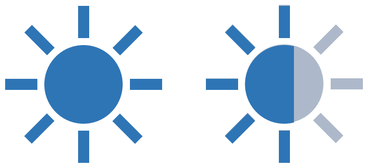
Top Communities Visited

St. Petersburg	97.7%
St. Pete Beach	12.7%
Treasure Island	7.7%
Madeira Beach	5.9%
Clearwater Beach	3.9%

Top Activities

89.0%	33.7%	17.9%	12.0%
Dining in restaurants	Shopping	Visit the beach	Swimming

Length of Stay



1.6 Days on Average

Travel Party Size

2.4 People

9.8% Traveled with Children

Daily Spending

$96.19

Per Person

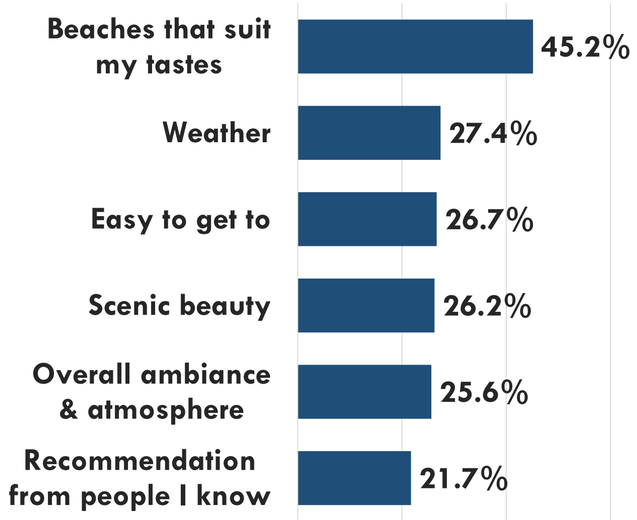
Destination Analysts
DO YOUR RESEARCH

THE FAMILY TRAVELER

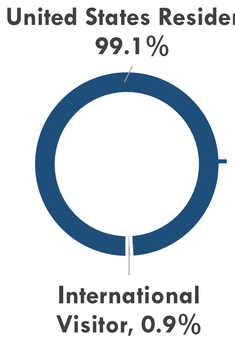
Q2 2021

Results presented here are reflective of visitors who were visiting the St. Pete/Clearwater area with children under the age of 18

Factors Important to Destination Decision



Domestic vs. International



POINT OF ORIGIN: TOP STATES

Florida	25.3%
Illinois	11.0%
Ohio	9.6%

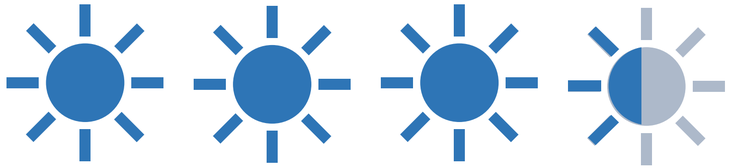
Top Communities Visited

Clearwater Beach	49.0%
Madeira Beach	40.7%
St. Petersburg	37.1%
St. Pete Beach	21.1%
Treasure Island	19.5%

Top Activities

87.0%	69.0%	57.8%	52.8%
Dining in restaurants	Visit the beach	Shopping	Swimming

Length of Stay



3.4 Days on Average

Travel Party Size

4.3 People

100% Traveled with Children

Daily Spending

$84.58

Per Person

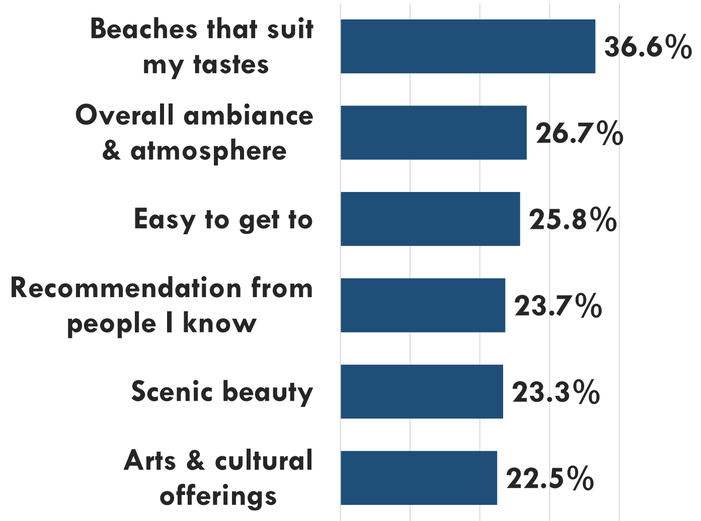
Destination Analysts
DO YOUR RESEARCH

THE AFFLUENT VISITOR

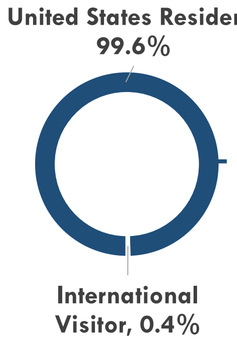
Q2 2021

Results presented here are reflective of visitors who reported having an annual household income of $150,000+

Factors Important to Destination Decision



Domestic vs. International



POINT OF ORIGIN: TOP STATES

Florida	30.8%
New York	8.3%
Illinois	6.9%

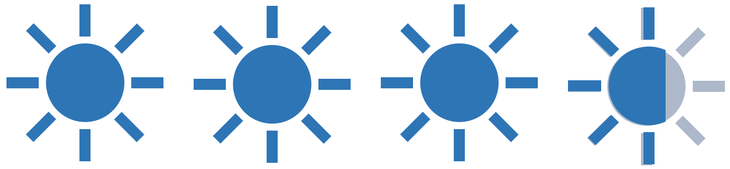
Top Communities Visited

St. Petersburg	54.8%
Clearwater Beach	33.2%
Madeira Beach	28.5%
St. Pete Beach	26.9%
Treasure Island	16.6%

Top Activities

94.3%	57.6%	56.9%	39.8%
Dining in restaurants	Visit the beach	Shopping	Swimming

Length of Stay



3.7 Days on Average

Travel Party Size

2.9 People

28.2% Traveled with Children

Daily Spending

$137.85

Per Person

Destination Analysts
DO YOUR RESEARCH

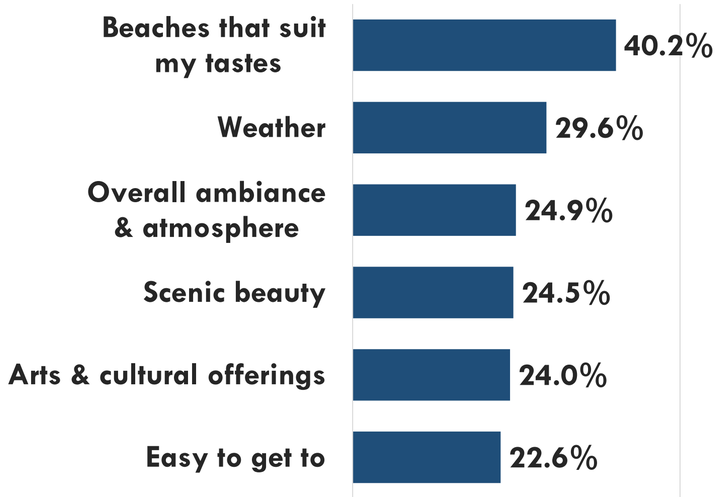
Q2 2021 Visitor Summaries by Generation

THE MILLENNIAL VISITOR

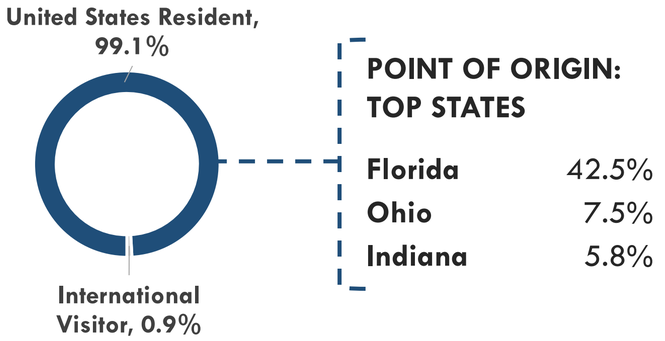
Q2 2021

Results presented here are reflective of visitors between the age of 24-39.

Factors Important to Destination Decision



Domestic vs. International



POINT OF ORIGIN: TOP STATES

Florida	42.5%
Ohio	7.5%
Indiana	5.8%

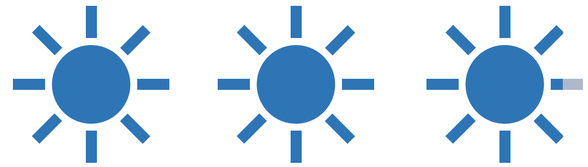
Top Communities Visited

St. Petersburg	54.8%
Clearwater Beach	33.1%
Madeira Beach	25.5%
St. Pete Beach	20.9%
Treasure Island	16.8%

Top Activities

80.8%	50.1%	42.9%	35.9%
Dining in restaurants	Visit the beach	Shopping	Swimming

Length of Stay



2.9 Days on Average

Travel Party Size

2.6 People

18.4% Traveled with Children

Daily Spending

$119.54

Per Person

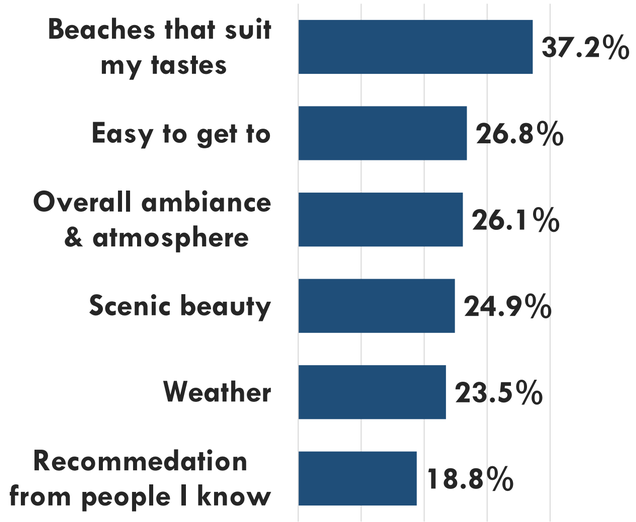
Destination Analysts
DO YOUR RESEARCH

THE GEN X VISITOR

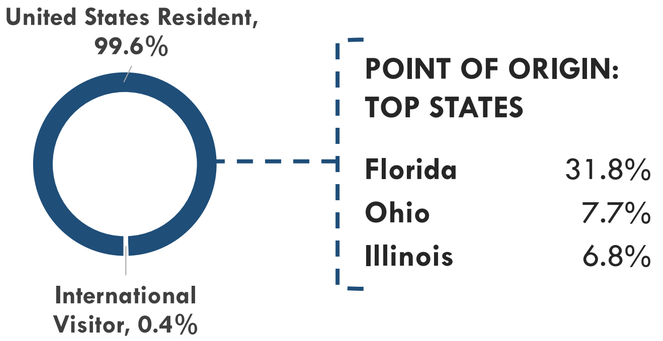
Q2 2021

Results presented here are reflective of visitors between the age of 40-55.

Factors Important to Destination Decision



Domestic vs. International



POINT OF ORIGIN: TOP STATES

Florida	31.8%
Ohio	7.7%
Illinois	6.8%

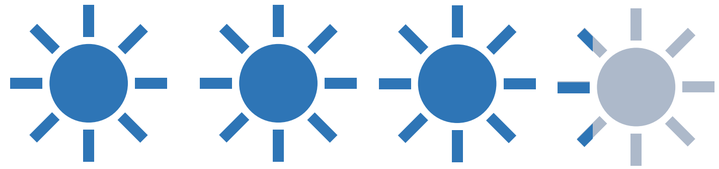
Top Communities Visited

Clearwater Beach	44.1%
St. Petersburg	37.5%
Madeira Beach	32.4%
St. Pete Beach	18.6%
Treasure Island	16.9%

Top Activities

87.8%	62.8%	56.2%	41.2%
Dining in restaurants	Visit the beach	Shopping	Swimming

Length of Stay



3.1 Days on Average

Travel Party Size

2.9 People

34.3% Traveled with Children

Daily Spending

$108.63

Per Person

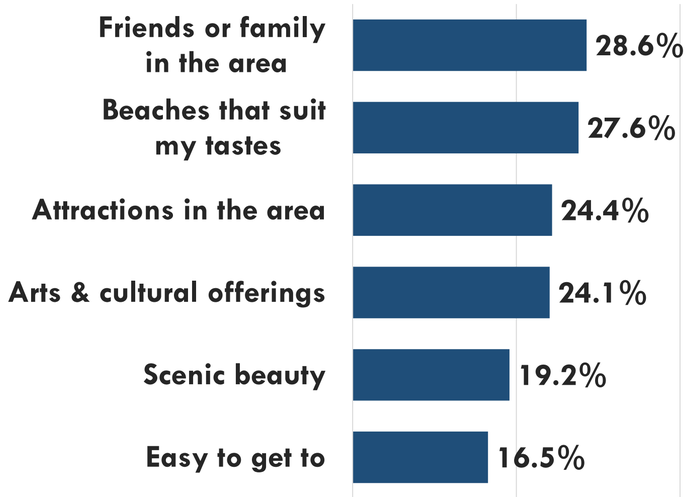
Destination Analysts
DO YOUR RESEARCH

THE BABY BOOMER VISITOR

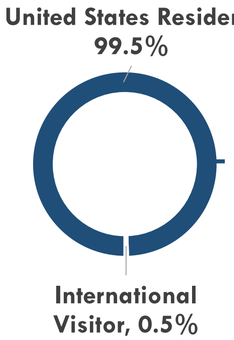
Q2 2021

Results presented here are reflective of visitors between the age of 56-74.

Factors Important to Destination Decision



Domestic vs. International



POINT OF ORIGIN: TOP STATES

Florida	42.6%
New York	6.4%
Georgia	4.5%

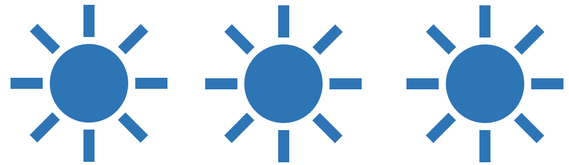
Top Communities Visited

St. Petersburg	51.8%
Clearwater Beach	29.0%
St. Pete Beach	22.0%
Madeira Beach	21.1%
Clearwater	8.7%

Top Activities

92.6%	54.4%	48.4%	35.8%
Dining in restaurants	Visit the beach	Shopping	Visit museums

Length of Stay



3.0 Days on Average

Travel Party Size

2.4 People

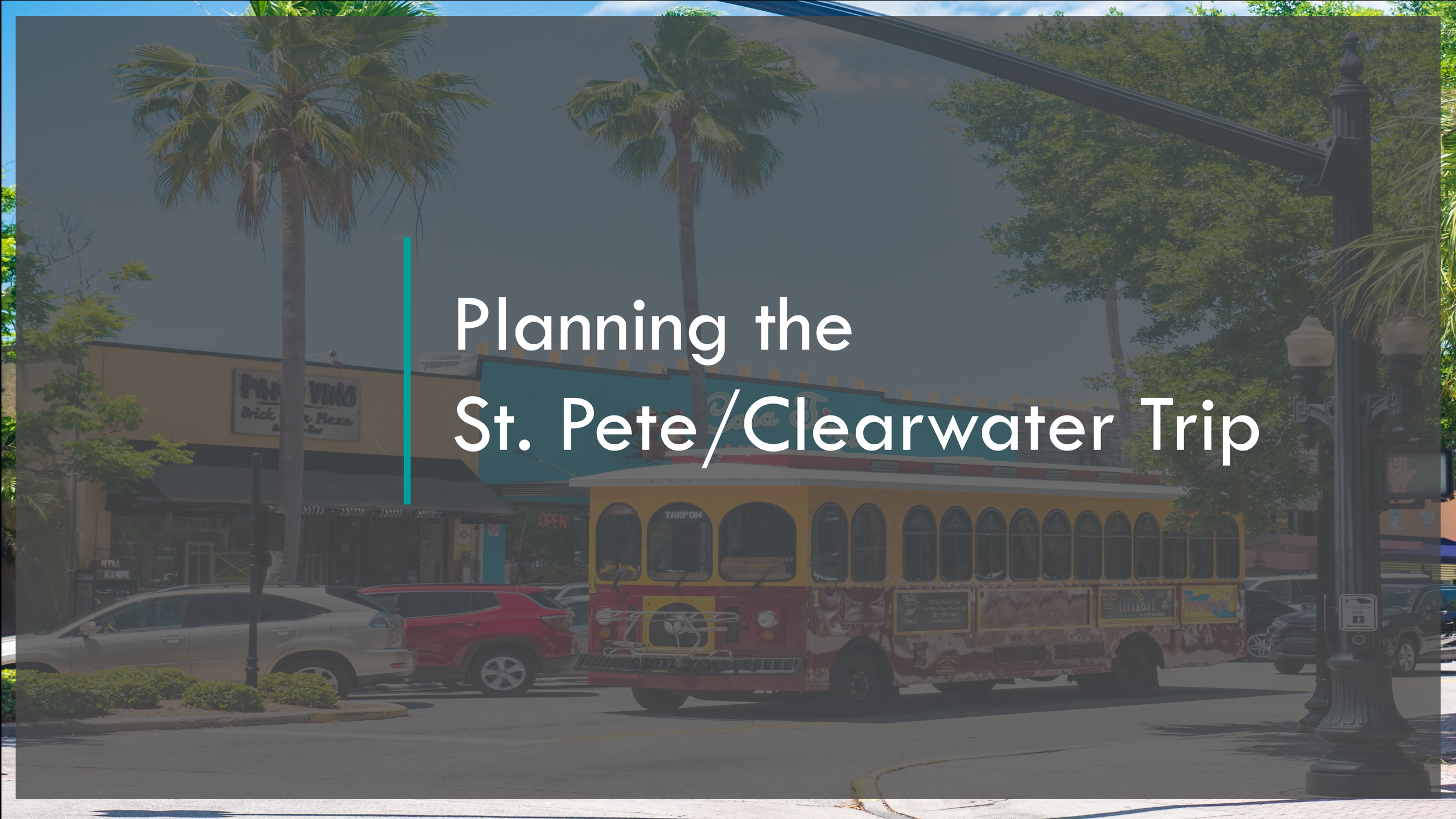
6.7% Traveled with Children

Daily Spending

$114.30

Per Person

Destination Analysts
DO YOUR RESEARCH



Planning the St. Pete/Clearwater Trip

WHEN DECISION TO VISIT WAS MADE

In the second quarter of 2021, St. Pete/Clearwater visitors decided to visit the destination approximately 7.7 weeks (53.7 days) prior to their actual arrival date-approximately 1 week less in advance compared to Q1 2021 (8.5 weeks/60.1 days). Hotel guests made the decision to visit an average of 3 months in advance (90.3 days), while VFRs decided approximately 2 months in advance (58.5 days) and day trippers approximately 1 month in advance (32.3 days).

Figure 1: Average Time Between Decision to Visit and Arrival

53.7 Days in Advance

Question: Approximately how many days before you arrived did you make the decision to visit the St. Pete/Clearwater area for this trip? Base: All Respondents. 1,395 responses.

Detail by Type of Visitor

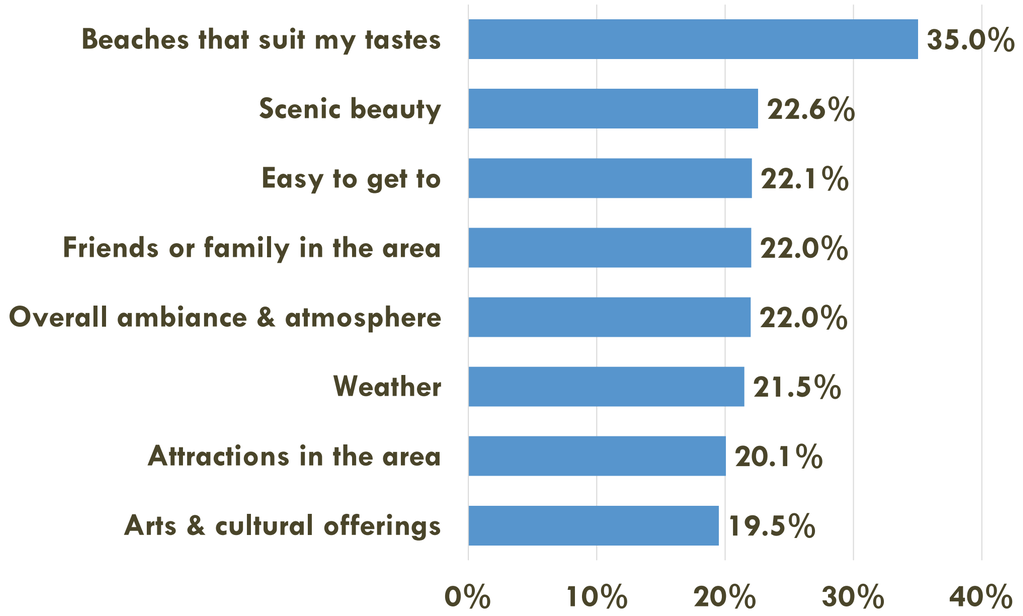
	Hotel	VFR	Day Trip
Average Days	90.3	58.5	32.3
Sample Size:	**479**	**214**	**369**

IMPORTANT FACTORS TO DESTINATION DECISION

The top factor driving visitation to the St. Petersburg/Clearwater area in Q2 2021 was beaches (35.0%). This were closely followed by scenic beauty (22.6%), easy to get to (22.1%), friends or family in the area (22.0%), overall ambiance & atmosphere (22.0%), weather (21.5%), attractions (20.1%) and arts & cultural offerings (19.5%).

Full detail on all factors tested is presented on the next page.

Figure 2: Important to Decision to Visit



Question: Which of the following were IMPORTANT to your decision to take this trip to the St. Pete/Clearwater area? (Select all that apply) Base: All Respondents. 1,374 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Beaches that suit my tastes	47.1%	30.5%	24.5%
Scenic beauty	22.7%	27.6%	17.5%
Easy to get to	18.9%	24.8%	19.5%
Friends or family in the area	10.8%	77.8%	25.5%
Overall ambiance & atmosphere	26.6%	25.9%	14.2%
Weather	29.8%	29.9%	12.1%
Attractions in the area	13.5%	11.1%	22.5%
Arts & cultural offerings	9.7%	6.9%	26.1%
Sample Size:	**466**	**213**	**365**

IMPORTANT FACTORS TO DESTINATION DECISION – FULL DETAIL

	Total	Hotel	VFR	Day Trip
Beaches that suit my tastes	35.0%	**47.1%**	30.5%	24.5%
Scenic beauty	22.6%	22.7%	27.6%	17.5%
Easy to get to	22.1%	18.9%	24.8%	19.5%
Friends or family in the area	22.0%	10.8%	77.8%	25.5%
Overall ambiance & atmosphere	22.0%	26.6%	25.9%	14.2%
Weather	21.5%	29.8%	29.9%	12.1%
Attractions in the area	20.1%	13.5%	11.1%	**22.5%**
Arts & cultural offerings	19.5%	9.7%	6.9%	**26.1%**
Recommendation from people I know	14.2%	**20.8%**	11.1%	9.7%
Restaurants, cuisine, food scene	12.0%	9.4%	8.1%	10.9%
A specific attraction:	11.0%	10.4%	7.6%	12.3%
Advertisements for the area	6.7%	9.4%	0.5%	5.1%
Shopping opportunities	5.7%	2.5%	4.4%	6.5%
St. Pete Pier	5.7%	2.0%	4.0%	7.5%
Outdoor recreational opportunities	4.2%	3.5%	4.6%	3.6%
Appealing hotels/resorts and other lodging options	4.0%	**7.3%**	0.2%	1.0%
The area's unique culture	3.1%	3.2%	1.6%	3.1%
Special event(s) and/or festival(s)	3.0%	2.8%	2.6%	3.8%
The St.Pete/Clearwater area is family-friendly	2.0%	1.2%	2.3%	2.2%
Good deal on airfare	2.0%	3.4%	4.7%	0.7%
Fishing opportunities	2.0%	0.7%	4.1%	1.8%
Articles, features, reviews, etc. about the area	1.8%	2.5%	0.9%	1.3%
Lifelong desire to visit	1.6%	3.9%	0.5%	1.1%
Good hotel rate	1.4%	**4.6%**	0.0%	0.0%
Sports or sporting events	1.3%	0.6%	0.0%	1.8%
Breweries/Distilleries/Craft beer scene	1.1%	1.0%	1.6%	1.0%
The St.Pete/Clearwater area is romantic	1.1%	1.3%	0.7%	0.8%
Golf	0.4%	0.7%	0.7%	0.3%
Sample Size:	**1,374**	**466**	**213**	**365**

Differences seen amongst visitor types:

- Compared to other segments, hotel guests were the likeliest to say that the area's beaches (47.1%) and/or recommendations from people they know (20.8%) were important factors to their decision to visit the St. Pete/Clearwater area.
- Hotel guests were also the most likely segment to say that appealing hotels and lodging options (7.3%) and a good hotel rate (4.6%) were important to their decision to visit the St. Pete/Clearwater area.
- Day trip visitors were more likely to say that the area's arts & cultural offerings (26.1%) and area attractions (22.5%) were influential to their destination visit compared to other segments.

Question: Which of the following were IMPORTANT to your decision to take this trip to the St. Pete/Clearwater area? (Select all that apply) Base: All Respondents. 1,374 responses.

TRAVEL PLANNING RESOURCES USED

User-generated content/review websites, social media content and online travel agencies were the most utilized travel planning resources. While visitors still heavily relied on user-generated and social media content while in market, the use of trip planning resources typically decreases once visitors arrive in the destination. Usage of the official Visit St. Pete/Clearwater website prior to arrival increased over the previous two quarters, with 29.3 percent of visitors using the site before their visit (vs. 12.8% in Q4 2020 and 18.6% in Q1 2021).

Figure 3: Resources Used before Arrival and While In Market

	Used Before Arrival	Used In-Market
User-generated content/Review websites	53.2%	32.1%
Social Media content	39.1%	32.9%
Online travel agencies	38.6%	0.5%
Opinions of friends or relatives	31.9%	14.8%
www.VisitStPeteClearwater.com	**29.3%**	**3.7%**
Travel guides, brochures	13.3%	10.3%
Television programming	4.8%	2.6%
YouTube or other online videos	3.9%	2.8%
Radio programming	3.1%	1.4%
Newspaper travel section	2.3%	1.8%
Lifestyle or travel magazines	1.9%	0.5%
Gulf to Bay St Pete/Clearwater Destination Magazine	**1.1%**	**1.5%**
Travel agency (traditional, offline)	0.7%	0.2%

Question: Which of the following resources did you use to plan your trip to the St. Pete/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. 1,395 responses.

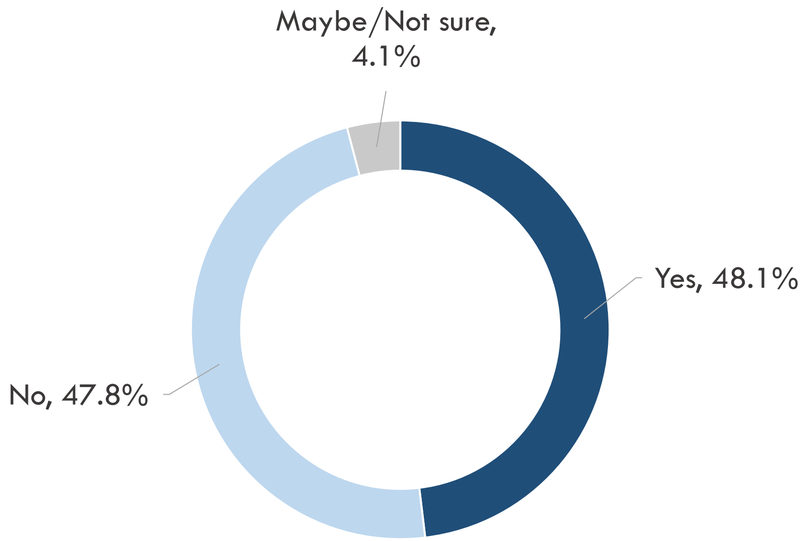
Detail by Traveler Segment

	Hotel		VFR		Day Trip	
	Pre-Arrival	In-Market	Pre-Arrival	In-Market	Pre-Arrival	In-Market
User-generated content/ Review websites	69.4%	51.2%	54.9%	44.6%	45.6%	20.3%
Social Media content	35.9%	33.5%	40.9%	40.4%	34.2%	26.3%
Online travel agencies	67.9%	1.6%	41.1%	2.3%	27.9%	0.2%
Opinions of friends or relatives	27.8%	8.6%	44.7%	37.6%	35.9%	17.1%
www.VisitStPeteClearwater.com	**26.3%**	**5.9%**	**26.8%**	**2.3%**	**25.4%**	**2.1%**
Travel guides, brochures	22.1%	18.9%	6.0%	11.8%	9.6%	5.3%
Television programming	2.5%	3.4%	2.8%	2.3%	5.6%	2.0%
YouTube or other online videos	4.0%	3.5%	1.2%	1.8%	3.3%	1.6%
Radio programming	1.3%	0.6%	0.7%	3.2%	4.3%	0.8%
Newspaper travel section	1.0%	3.0%	0.0%	0.2%	3.1%	1.0%
Lifestyle or travel magazines	4.3%	0.4%	0.0%	0.7%	0.9%	0.4%
Gulf to Bay St Pete/Clearwater Destination Magazine	**1.8%**	**2.9%**	**0.2%**	**0.7%**	**0.3%**	**0.7%**
Travel agency (traditional, offline)	1.0%	0.0%	0.5%	0.5%	0.2%	0.0%
Sample Size:	**479**		**214**		**369**	

EARNED & PAID MEDIA RECALL

Nearly half of area visitors surveyed in Q2 2021 recalled seeing, hearing or reading earned media or advertisements/promotions for the St. Pete/Clearwater area in the past six months (48.1% -- up from 39.6% in Q2 2019). Day trip visitors and hotel guests were the most likely segments to recall media for the destination (52.7% and 48.1%, respectively).

Figure 4: Media Recall



Question: In the last six months, have you seen, read, or heard any travel stories, advertising, or promotions for the St. Pete/Clearwater area? Base: All Respondents 1,349 responses.

Detail by Traveler Segment

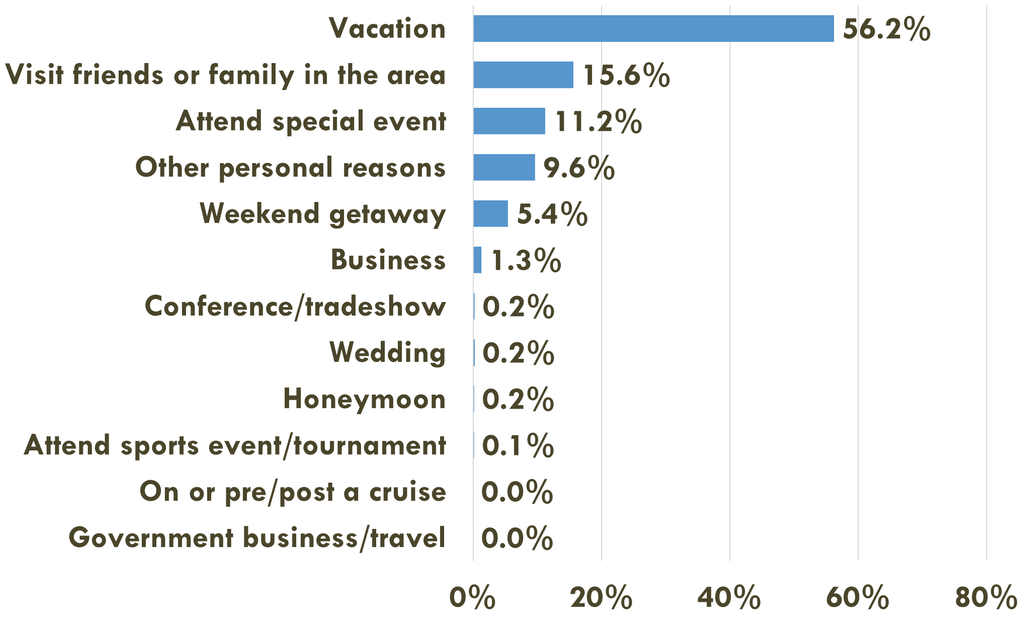
	Hotel	VFR	Day Trip
Yes	48.1%	25.5%	52.7%
No	48.0%	65.3%	44.1%
Maybe/Not sure	3.9%	9.2%	3.2%
Sample Size:	**469**	**204**	**353**

Visitor Trip Details

PRIMARY REASON FOR VISIT

In Q2 2021, St. Pete/Clearwater visitors primarily came to the destination for leisure purposes. Vacation was the primary reason for over half of St. Pete/Clearwater visitors to come to the area (56.2%), followed by 15.6 percent who came to visit friends or family, 11.2 percent who were here to attend a special event and 9.6 percent who were here for other personal reasons. Hotel guests were most likely to characterize their St. Pete/Clearwater trip as a vacation (79.3%), while day trippers were the likeliest segment to be in the destination for a special event (17.5%) or for other personal reasons (14.6%).

Figure 5: Primary Reason for Visit



Question: What is your primary reason for visiting the St. Pete/Clearwater Area? (Select one)
Base: All Respondents. 1,345 responses.

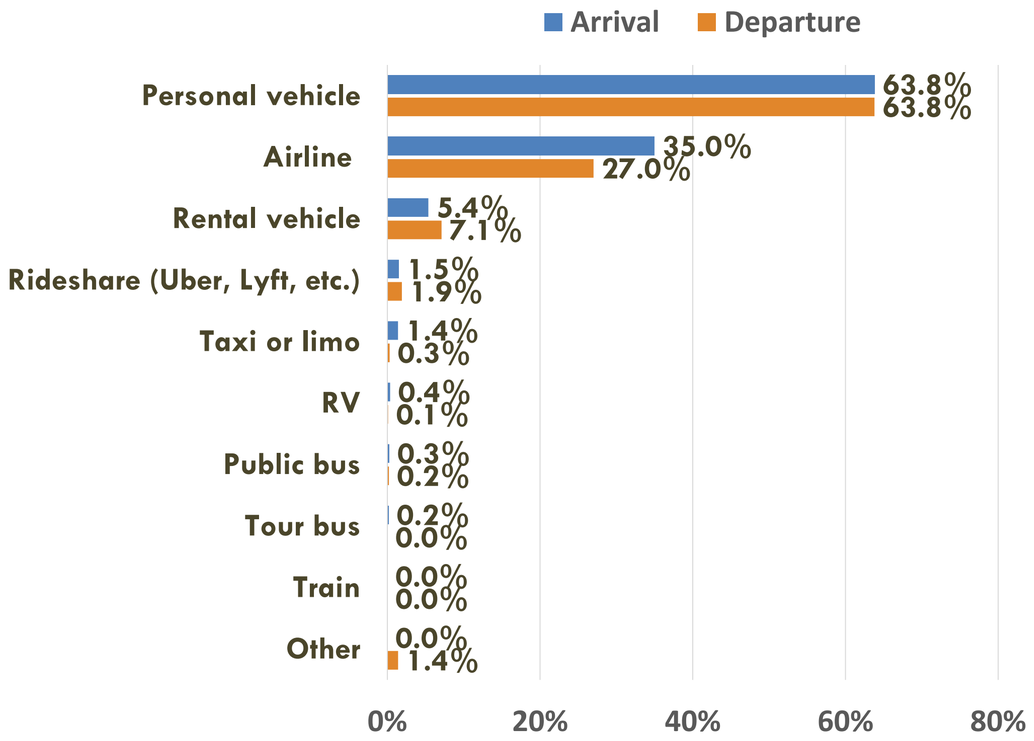
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Vacation	79.3%	44.5%	39.9%
Visit friends or family in the area	3.3%	41.4%	22.2%
Attend special event	2.9%	0.7%	17.5%
Other personal reasons	1.2%	4.2%	14.6%
Weekend getaway	9.0%	8.3%	4.3%
Business	1.4%	0.2%	1.5%
Conference/tradeshow	0.9%	0.0%	0.0%
Wedding	1.0%	0.0%	0.0%
Honeymoon	0.7%	0.0%	0.0%
Attend sports event/tournament	0.3%	0.7%	0.0%
On or pre/post a cruise	0.0%	0.0%	0.0%
Government business/travel	0.0%	0.0%	0.0%
Sample Size:	**479**	**213**	**320**

METHOD OF ARRIVAL & DEPARTURE

The top two methods of arrival into the St. Pete/Clearwater area were by personal vehicle (63.8% -- up from 42.8% in Q2 2019) and airline (35.0% -- down from 52.5% in Q2 2019). Day trippers and VFRs were the likeliest to arrive by personal vehicle (74.3% and 51.3%, respectively), while hotel guests were the likeliest segment to arrive by airline (54.9%), rental vehicle (7.9%) and rideshare (7.2%). In general, visitors departed from the destination through the same mode of transportation used to arrive in the area.

Figure 6: Method of Arrival and Departure



Question: How did you arrive in the St. Pete/Clearwater area and how will you leave? (Select all that apply) Base: All Respondents. 1,395 responses.

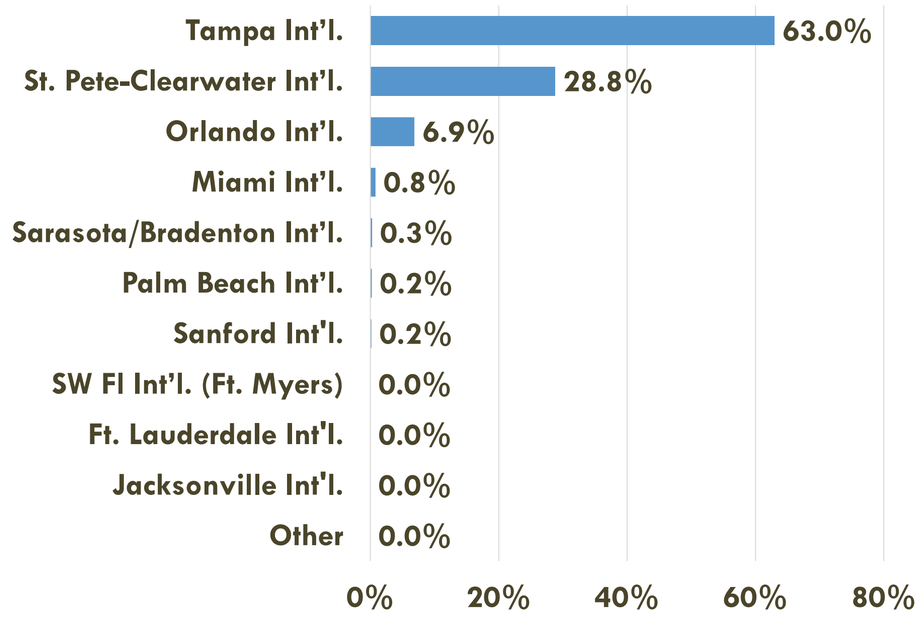
Detail by Traveler Segment

	Hotel		VFR		Day Trip	
	Arrival	Departure	Arrival	Departure	Arrival	Departure
Personal vehicle	45.1%	45.1%	51.3%	55.2%	74.3%	74.0%
Airline	54.9%	36.9%	48.9%	47.6%	23.8%	18.2%
Rental vehicle	7.9%	10.3%	0.5%	1.8%	5.4%	5.7%
Rideshare (Uber, Lyft, etc.)	7.2%	7.6%	0.0%	0.7%	0.0%	0.3%
Taxi or limo	1.9%	1.8%	0.0%	0.0%	0.0%	0.0%
RV	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Public bus	0.0%	0.0%	0.0%	0.0%	0.3%	0.3%
Tour bus	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Train	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	1.6%	1.5%	0.0%	0.0%	1.6%	1.6%
Sample Size:	**479**		**214**		**369**	

ARRIVAL AIRPORT

Most visitors arriving in the area by plane flew into Tampa International Airport (63.0% -- up from 42.7% in Q2 2019), followed by nearly 30 percent of visitors who arrived through the St. Pete-Clearwater International Airport (28.8% -- down from 44.6% in Q2 2019). Additionally, 6.9 percent of air visitors flew into Orlando. Nearly four-in-ten day trip visitors and VFRs who arrived by airplane flew directly into St. Pete-Clearwater International Airport (39.3% and 36.5% respectively), while hotel guests were the most likely sector to fly into Tampa (72.2%).

Figure 7: Arrival Airport



Question: At which airport did you arrive into the area? (Select one) Base: All Respondents who arrived in the area by airplane. 628 responses.

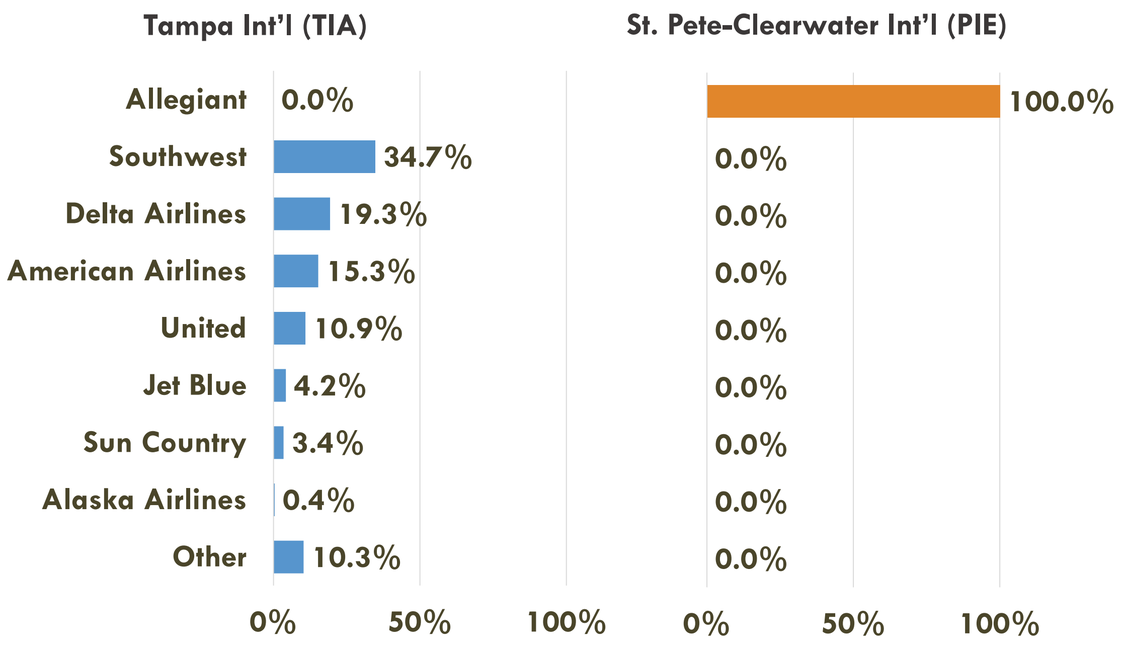
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Tampa Int'l.	72.2%	61.6%	46.7%
St. Pete-Clearwater Int'l.	22.9%	36.5%	39.3%
Orlando Int'l.	2.8%	1.9%	12.6%
Sarasota/Bradenton Int'l.	0.7%	0.0%	1.4%
Miami Int'l.	0.9%	0.0%	0.0%
SW FL Int'l (Ft. Myers)	0.0%	0.0%	0.0%
Sanford Int'l.	0.5%	0.0%	0.0%
Ft. Lauderdale Int'l.	0.0%	0.0%	0.0%
Jacksonville Int'l.	0.0%	0.0%	0.0%
Palm Beach Int'l.	0.0%	0.0%	0.0%
Other	0.0%	0.0%	0.0%
Sample Size:	**265**	**111**	**79**

ARRIVAL AIRLINE BY AIRPORT

All air travelers arriving at the St. Pete-Clearwater International Airport flew with Allegiant Airlines. Meanwhile, visitors to the destination arriving via the Tampa International Airport most commonly selected Southwest (34.7%), Delta Airlines (19.3%), American Airlines (15.3%) or United Airlines (10.9%) as their carrier.

Figure 8: Arrival Airline Airport



Question: Which airline did you use? (Select one) Base: All Respondents who arrived in the area by airplane at Tampa Int'l or St. Pete-Clearwater Int'l. 598 responses.

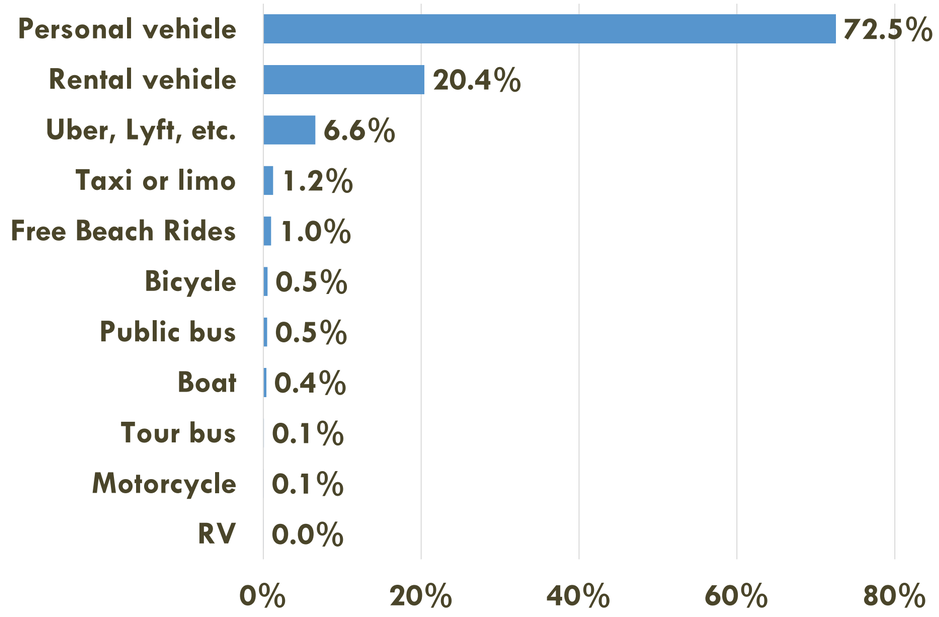
Detail by Traveler Segment

	Hotel		VFR		Day Trip	
	TIA	PIE	TIA	PIE	TIA	PIE
Allegiant	0.0%	100.0%	0.0%	100.0%	0.0%	100.0%
Southwest	33.6%	0.0%	30.8%	0.0%	27.1%	0.0%
Delta Airlines	16.3%	0.0%	15.4%	0.0%	24.4%	0.0%
American Airlines	20.2%	0.0%	24.7%	0.0%	13.6%	0.0%
United	10.8%	0.0%	10.0%	0.0%	11.6%	0.0%
Jet Blue	5.1%	0.0%	8.4%	0.0%	1.9%	0.0%
Sun Country	1.1%	0.0%	0.8%	0.0%	5.8%	0.0%
Alaska Airlines	0.9%	0.0%	2.3%	0.0%	3.8%	0.0%
Other	11.9%	0.0%	7.7%	0.0%	11.7%	0.0%
Sample Size:	**253**		**108**		**69**	

TRANSPORTATION USED IN-MARKET

Amongst all visitors surveyed, personal vehicle and rental vehicle were the most utilized forms of transportation within the St. Pete/Clearwater area. In total, nearly three-quarters of visitors used a personal car to travel around Pinellas County (72.5%) and 20.4 percent used a rental car. Furthermore, 6.6 percent utilized a ride sharing service such as Uber or Lyft. Hotel guests were the most likely segment to rent a vehicle (27.4%), use ride sharing services (20.1%), taxis or limos (4.3%) and/or Free Beach rides (1.1%) to travel around the destination.

Figure 9: Transportation Used In-Market



Question: Which modes of transportation did you, or will you, use while in the St. Pete/Clearwater area? (Select all that apply) Base: All Respondents. 1,395 responses.

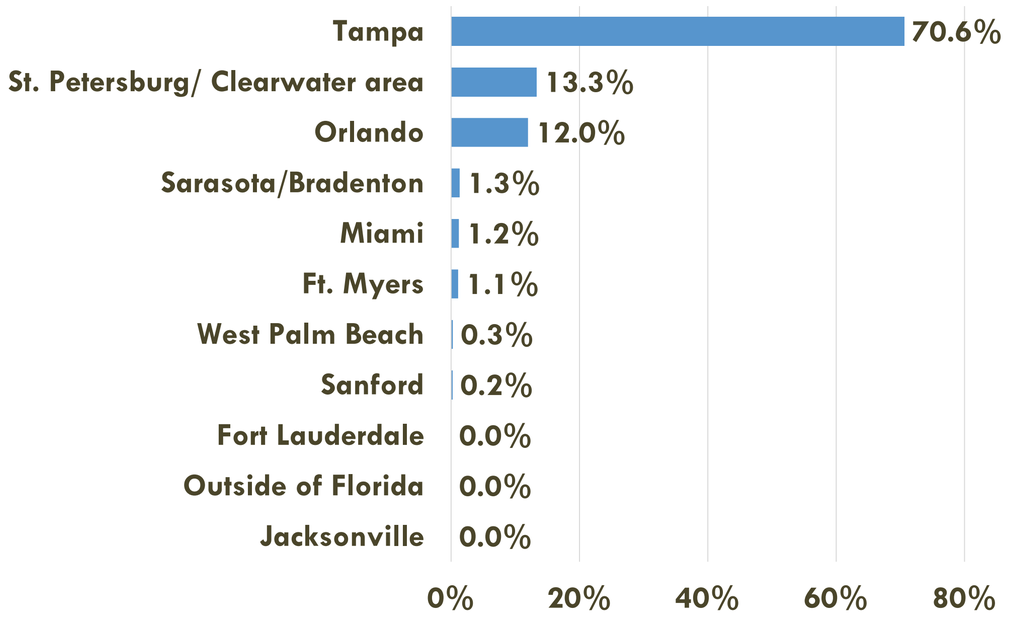
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Personal vehicle	47.6%	87.3%	84.9%
Rental vehicle	27.4%	11.3%	13.2%
Uber, Lyft, etc.	20.1%	6.0%	2.7%
Taxi or limo	4.3%	0.5%	0.3%
Free Beach Rides	1.1%	0.7%	0.7%
Bicycle	0.3%	0.0%	0.6%
Public bus	0.2%	0.7%	0.5%
Boat	0.0%	0.0%	0.6%
Tour bus	0.2%	0.7%	0.0%
Motorcycle	0.2%	0.0%	0.0%
RV	0.0%	0.0%	0.0%
Sample Size:	**479**	**214**	**369**

RENTAL VEHICLE PICK-UP CITY

A large proportion of visitors who used a rental car picked up their rental in Tampa (70.6%). 13.3 percent of St. Pete/Clearwater visitors picked up their rental in Pinellas County and 12.0 percent picked up the rental car in Orlando. Of these visitors surveyed, hotel guests were the most likely segment to rent a car in St. Pete/Clearwater (19.8%).

Figure 10: Rental Vehicle Pick-Up City



Question: In which city did you rent your rental vehicle? (Select one)
Base: Respondents who arrived in the area by rental car. 336 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Tampa	70.5%	90.1%	59.8%
St. Petersburg/ Clearwater area	19.8%	6.0%	11.1%
Orlando	5.5%	4.0%	21.7%
Sarasota/Bradenton	0.0%	0.0%	3.3%
Miami	0.7%	0.0%	2.5%
Ft. Myers	1.7%	0.0%	1.6%
West Palm Beach	1.0%	0.0%	0.0%
Sanford	0.7%	0.0%	0.0%
Fort Lauderdale	0.0%	0.0%	0.0%
Outside of Florida	0.0%	0.0%	0.0%
Jacksonville	0.0%	0.0%	0.0%
Sample Size:	**133**	**23**	**43**

TRAVEL PARTY SIZE

Travel groups were most commonly comprised of 2.6 people. This included 1.3 adult females, 0.9 adult males and 0.4 children aged 17 years or younger. 20.8 percent of visitors surveyed traveled with children under the age of 18. VFRs were the likeliest segment to have children in their parties (23.7%), while hotel guests were the least likely visitors to have children included in their groups (18.9%).

Figure 11:Travel Party Size

	Mean
Male adults (18 yrs. +)	0.9
Female adults (18 yrs. +)	1.3
Male children (0 to 17 yrs.)	0.2
Female children (0 to 17 yrs.)	0.2
Average Travel Party Size	**2.6**
Percent with children in party	**20.8%**

Detail by Traveler Segment

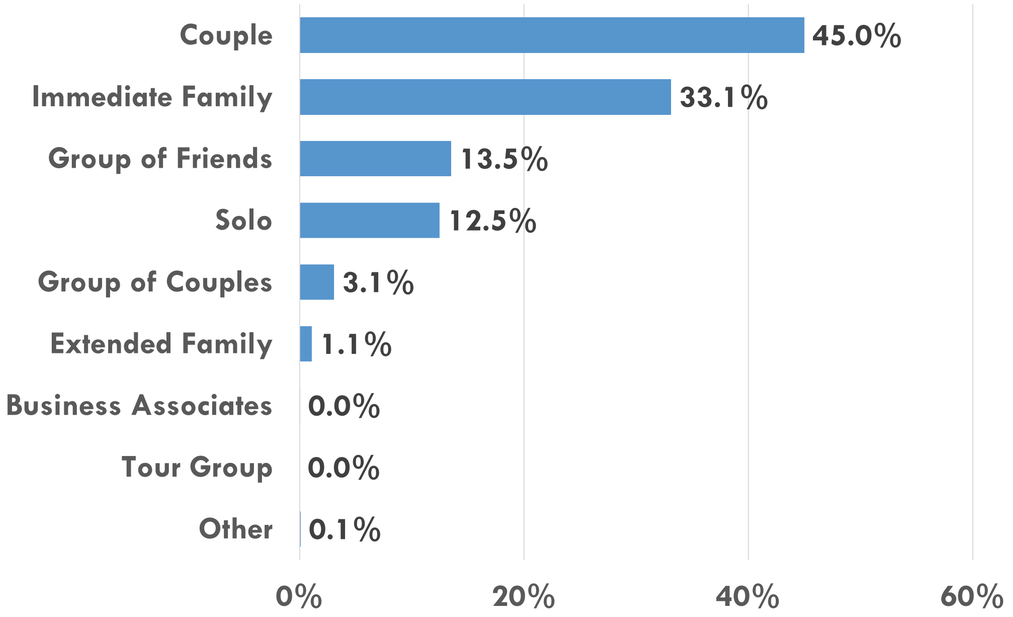
	Hotel	VFR	Day Trip
Male adults (18 yrs. +)	1.0	0.8	0.9
Female adults (18 yrs. +)	1.3	1.0	1.3
Male children (0 to 17 yrs.)	0.2	0.2	0.2
Female children (0 to 17 yrs.)	0.2	0.2	0.2
Average Travel Party Size	**2.7**	**2.2**	**2.6**
Percent with Children in Party	18.9%	23.7%	19.4%
Sample Size:	**479**	**214**	**369**

Question: How many people of each type are in your immediate travel party, including yourself?
Base: All Respondents. 1,395 responses.

TRAVEL PARTY COMPOSITION

Nearly half of all visitors travelled to the St. Pete/Clearwater area as a couple (45.0%). Additionally, one-third traveled with their immediate family (33.1%), 13.5 percent traveled with a group of friends and 12.5 percent traveled solo. The likeliest segment to travel as a couple were hotel guests (60.1%), while VFRs were the likeliest segment to travel alone (27.5%) and day trip visitors were the most likely to travel with a group of friends (16.3%).

Figure 12: Travel Party Composition



Question: Which best describes your travel group on this trip? Are you…? (Select all that apply)
Base: All Respondents. 1,395 responses.

Detail by Traveler Segment

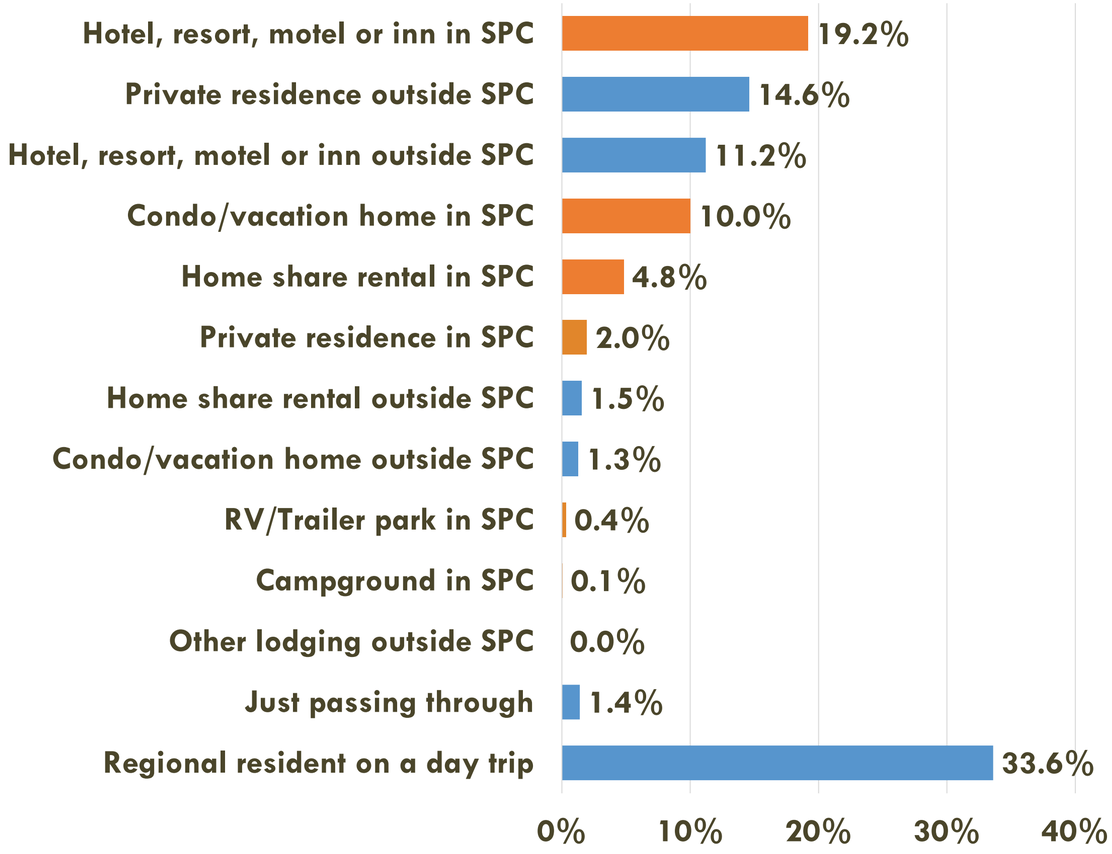
	Hotel	VFR	Day Trip
Couple	60.1%	44.6%	36.6%
Immediate Family	30.3%	32.8%	32.8%
Group of Friends	8.3%	8.3%	16.3%
Solo	5.3%	27.5%	16.1%
Group of Couples	3.5%	0.7%	3.1%
Extended Family	0.9%	0.2%	1.0%
Business Associates	0.0%	0.0%	0.2%
Tour Group	0.2%	0.0%	0.0%
Other	0.0%	0.0%	0.0%
Sample Size:	**479**	**214**	**369**

LODGING TYPE

Approximately four-in-ten of all visitors surveyed in Q2 of 2021 stayed overnight in the destination (36.4%). The largest proportion of overnight visitors stayed in paid lodging such as a St. Pete/Clearwater hotel (19.2%) condo or vacation home rental (10.0%) or a home share rental (4.8%). Additionally, 2.0 percent stayed in a private residence of local friends or family.

Day-trippers—including those staying in paid or private accommodations outside the St. Pete/Clearwater area and regional residents on leisure day trips—represented 62.2 percent of visitors surveyed (an increase from 56.6% in Q2 2019).

Figure 13: Type of Lodging

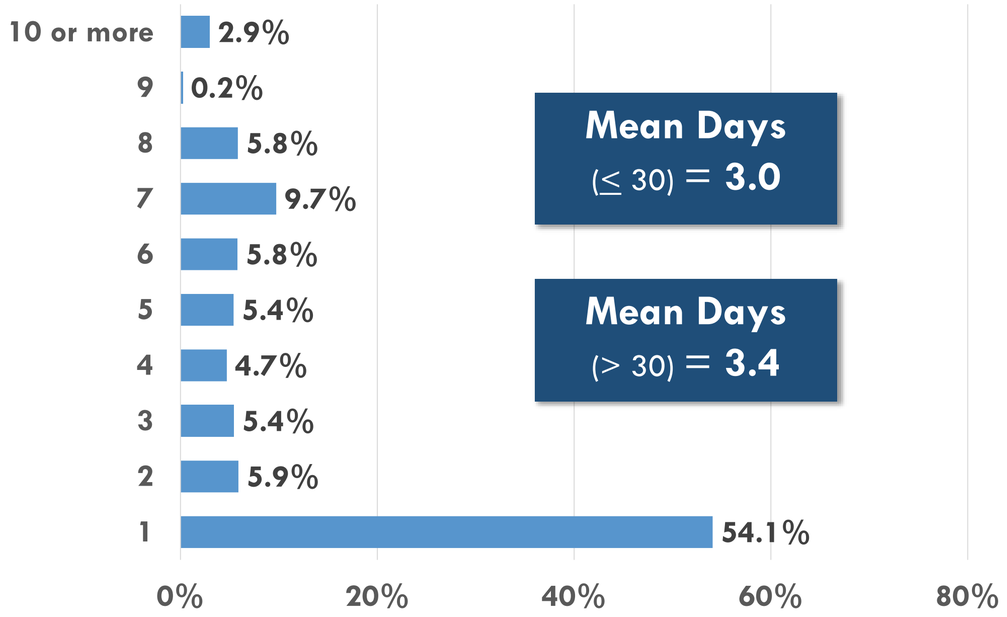


Question: Where are you staying overnight on this trip to the St. Pete/Clearwater area? (Select one) Base: All Respondents. 1,395 responses.

DAYS IN ST. PETE/CLEARWATER

The average visitor surveyed in Q2 2021 who spent less than 30 days in the destination, stayed in St. Pete/Clearwater for 3.0 days (down slightly from 3.3 days in Q2 2019). VFRs reported the longest length of stay averaging 6.4 days in the area, followed by hotel guests who stayed an average of 5.3 days. Looking specifically at visitors who had extended stays of more than 30 days in the destination, the average length of stay was 3.4 days across all segments. VFRs had the longest extended stay with an average of 9.7 days.

Figure 14: Days in Market



Question: How many total days and nights did you, or will you, stay in the St. Pete/Clearwater area on this trip? Base: All Respondents. 1,371 responses.

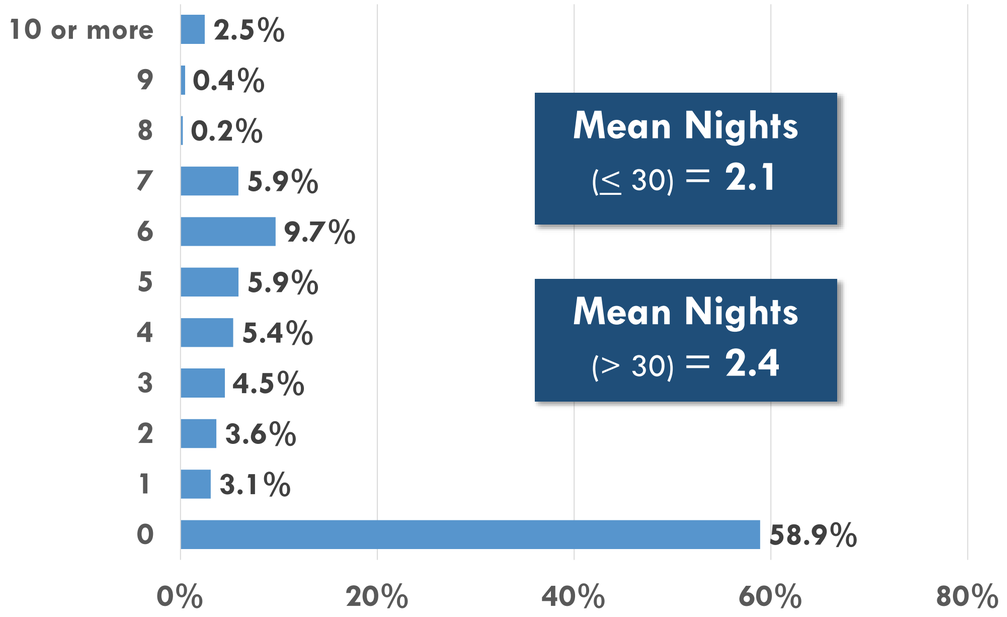
Detail by Traveler Segment

	Hotel	VFR	Day Trip
10 or more	2.0%	16.6%	0.6%
9	0.4%	2.3%	0.0%
8	13.4%	10.2%	0.3%
7	14.5%	21.9%	1.9%
6	15.6%	7.8%	0.7%
5	15.9%	11.4%	1.0%
4	16.7%	10.2%	0.7%
3	10.8%	14.6%	3.9%
2	9.6%	4.4%	6.2%
1	1.0%	0.7%	84.4%
Mean Days (<30)	**5.3**	**6.4**	**1.3**
Mean Days (>30)	**5.3**	**9.7**	**1.3**
Sample Size:	**478**	**204**	**369**

NIGHTS IN ST. PETE/CLEARWATER

St. Pete/Clearwater visitors spent an average of 2.1 nights in the area, a decrease from 2.5 nights in Q2 2019. 9.0 percent of visitors surveyed spent a week or more in the destination. VFRs averaged the longest stays, with 29.3 percent staying 7 or more nights.

Figure 15: Nights in Market



Question: How many total days and nights did you, or will you, stay in the St. Pete/Clearwater area on this trip? Base: All Respondents. 1,378 responses.

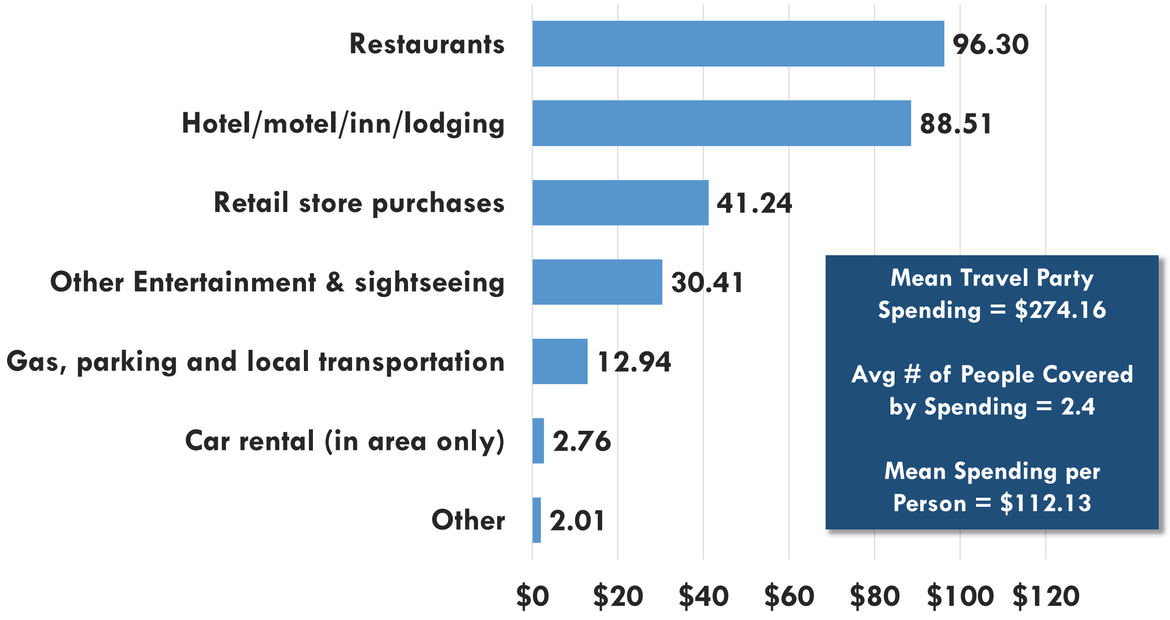
Detail by Traveler Segment

	Hotel	VFR	Day Trip
10 or more	1.5%	12.0%	--
9	0.5%	4.9%	--
8	0.4%	1.4%	--
7	13.4%	11.1%	--
6	14.5%	21.7%	--
5	16.1%	7.8%	--
4	15.7%	11.8%	--
3	16.6%	9.7%	--
2	11.1%	15.2%	--
1	9.5%	4.4%	--
0	0.7%	0.0%	100.0%
Mean Nights (<30)	**4.3**	**5.4**	**--**
Mean Nights (>30)	**4.3**	**8.8**	**--**
Sample Size:	**478**	**204**	**369**

DAILY SPENDING IN-MARKET

St. Pete/Clearwater area visitor surveyed spent $274.16 per travel party in Pinellas County — $55.56 more than in Q2 2019. It is estimated that the average visitor represents $112.13 per person in daily spending covering an average of 2.4 travelers. Hotel guests were the highest spenders, averaging $476.85 per travel party and $199.33 per person, covering 2.4 travelers. This group spent an average of $256.58 on their St. Pete/Clearwater area lodging accommodations — up from $233.37 in Q2 2019.

Figure 16: Per Day Travel Party Spending



Question: PER DAY, approximately how much will you spend on each of the following while in the St. Pete/Clearwater area? Base: All Respondents. 1,324 responses.

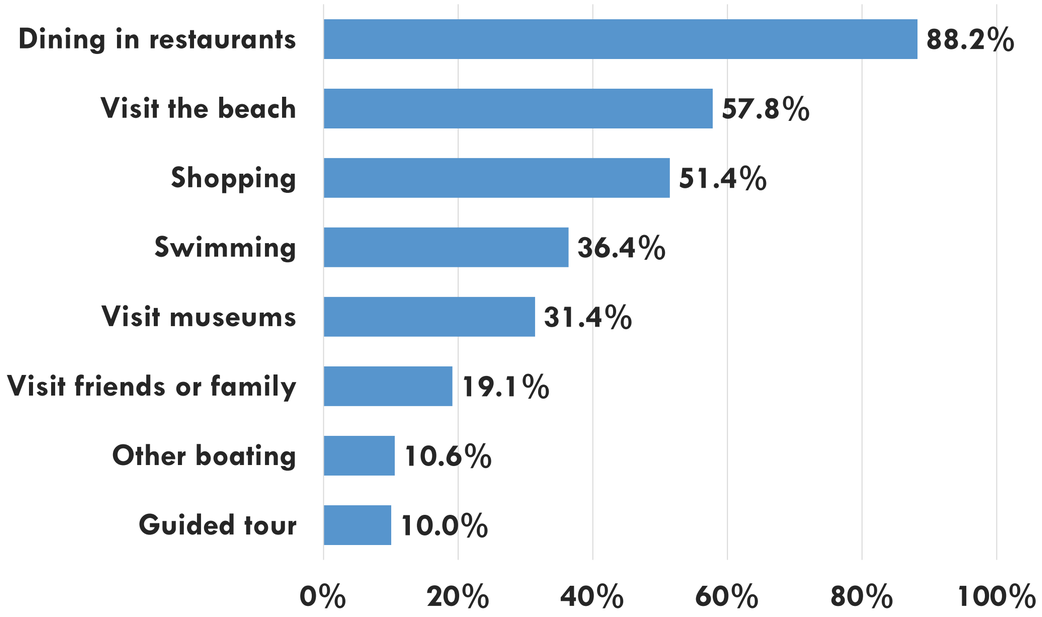
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Restaurants	$133.71	$81.16	$75.85
Hotel/motel/inn/lodging	$256.58	$10.00	$6.51
Retail store purchases	$38.83	$29.44	$42.44
Other Entertainment & sightseeing	$23.18	$16.68	$34.94
Gas, parking and local transportation	$16.93	$7.25	$13.01
Car rental (in area only)	$4.33	$0.56	$2.02
Other	$3.28	$1.62	$0.36
Mean Spending per Travel Party	**$476.85**	**$146.72**	**$175.13**
# of People Covered by Spending	2.4	2.2	2.3
Mean Spending per Person	**$199.33**	**$66.15**	**$74.86**
Sample Size:	**474**	**199**	**321**

TRIP ACTIVITIES

Visitors participated in a variety of activities during their stay in the destination but mostly dined in restaurants (88.2%), visited the beach (57.8%) and went shopping (51.4%). St. Pete/Clearwater visitors were presented with a list of 25 activities and asked which they had or would do during their trip to the area. The chart and table below outline the top 8 activities selected. *Full detail on all factors tested is presented on the next page.*

Figure 17: Trip Activities



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. 1,395 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Dining in restaurants	95.0%	95.1%	83.9%
Visit the beach	79.9%	77.6%	42.7%
Shopping	70.3%	60.5%	38.8%
Swimming	71.6%	52.6%	14.8%
Visit museums	23.4%	27.7%	36.4%
Visit friends or family	17.1%	66.5%	18.6%
Other boating	19.8%	13.4%	5.1%
Guided tour	16.9%	10.9%	5.2%
Sample Size:	**479**	**214**	**369**

TRIP ACTIVITIES – FULL DETAIL

	Total	Hotel	VFR	Day Trip
Dining in restaurants	88.2%	**95.0%**	**95.1%**	83.9%
Visit the beach	57.8%	**79.9%**	**77.6%**	42.7%
Shopping	51.4%	**70.3%**	**60.5%**	38.8%
Swimming	36.4%	**71.6%**	52.6%	14.8%
Visit museums	31.4%	23.4%	27.7%	**36.4%**
Visit friends or family	19.1%	17.1%	66.5%	18.6%
Other boating	10.6%	19.8%	13.4%	5.1%
Guided tour	10.0%	**16.9%**	10.9%	5.2%
Photography	9.5%	18.6%	9.2%	6.3%
Bars/Nightlife	5.2%	7.7%	**11.1%**	3.0%
Fishing	4.4%	3.6%	**10.1%**	2.5%
Attend a festival or special event	4.2%	4.2%	3.5%	4.1%
Shelling	4.1%	4.5%	6.9%	1.7%
Bird watching	3.2%	1.8%	4.1%	3.3%
Jet skiing	3.0%	5.5%	3.7%	0.2%
Kayaking/Canoeing	2.9%	4.0%	2.8%	1.7%
Biking	2.8%	2.4%	3.4%	1.9%
Visit breweries and/or distilleries	2.5%	1.9%	8.8%	2.0%
Take a dining cruise	2.3%	3.7%	4.0%	0.6%
Attend or participate in a sporting event	1.9%	1.8%	1.4%	1.9%
Parasailing	1.5%	2.6%	1.6%	1.1%
Sailing	0.9%	0.2%	0.9%	1.1%
Paddle boarding	0.9%	1.8%	0.2%	0.2%
Golf	0.8%	1.2%	0.9%	0.2%
Baseball Spring Training	0.1%	0.0%	0.0%	0.0%
Sample Size:	**1,395**	**479**	**214**	**369**

Differences seen amongst visitor types:

- Hotel guests and VFRs were more likely than day trip visitors to have dined in restaurants, visited a beach and shopped while in St. Pete/Clearwater.
- Hotel guests were also the likeliest segment to have gone swimming and have participated in a guided tour (71.6% and 16.9%, respectively).
- Responding VFRs were more likely than hotel guests and day trippers to have enjoyed bars & nightlife and fishing (11.1% and 10.1%, respectively).
- Day trippers were more inclined than hotel guests or VFRs to have visited a museum in the area (36.4%).

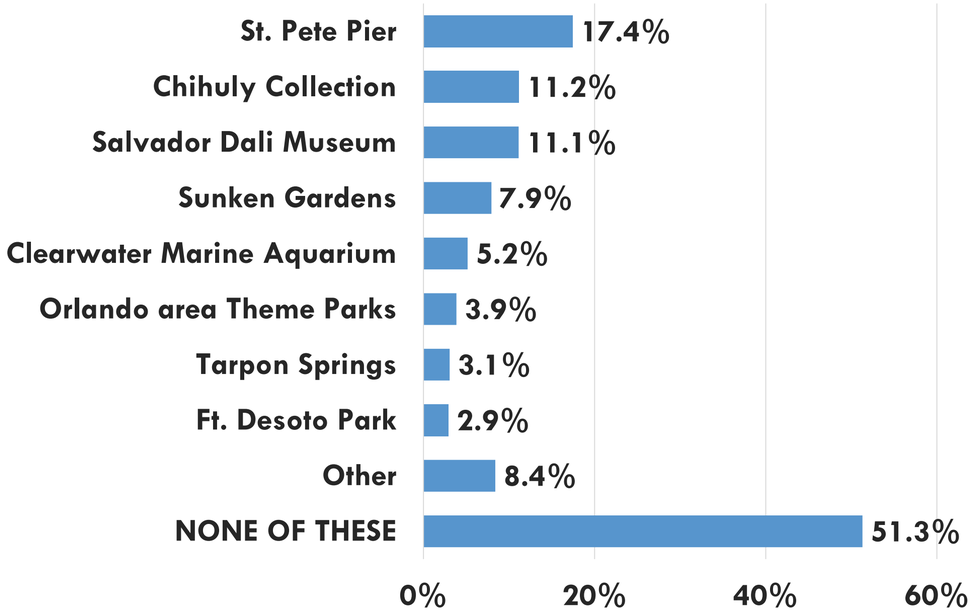
Question: Which of these activities did you, or will you, participate in while in the St. Pete/Clearwater area? (Select all that apply)

Base: All Respondents. 1,395 responses.

ATTRACTIONS VISITED

Attractions most frequented by visitors in Q2 2021 were the St. Pete Pier (17.4%), the Chihuly Collection (11.2%) and the Salvador Dali Museum (11.1%). Additionally, 7.9 percent of respondents visited Sunken Gardens (7.9%) and the Clearwater Marine Aquarium (5.2%). VFRs were the likeliest to have visited the St. Pete Pier (26.4%) and Sunken Gardens (12.7%).

Figure 18: Attractions Visited



Detail by Traveler Segment

	Hotel	VFR	Day Trip
St. Pete Pier	18.1%	26.4%	15.7%
Chihuly Collection	11.8%	11.3%	11.3%
Salvador Dali Museum	7.3%	5.5%	13.7%
Sunken Gardens	6.5%	12.7%	7.8%
Clearwater Marine Aquarium	8.4%	9.7%	3.7%
Orlando area Theme Parks	1.6%	2.3%	4.7%
Tarpon Springs	1.7%	5.1%	3.2%
Ft. Desoto Park	1.5%	3.2%	2.6%
Other	8.6%	11.8%	8.2%
NONE OF THESE	63.1%	51.7%	46.1%
Sample Size:	**479**	**214**	**369**

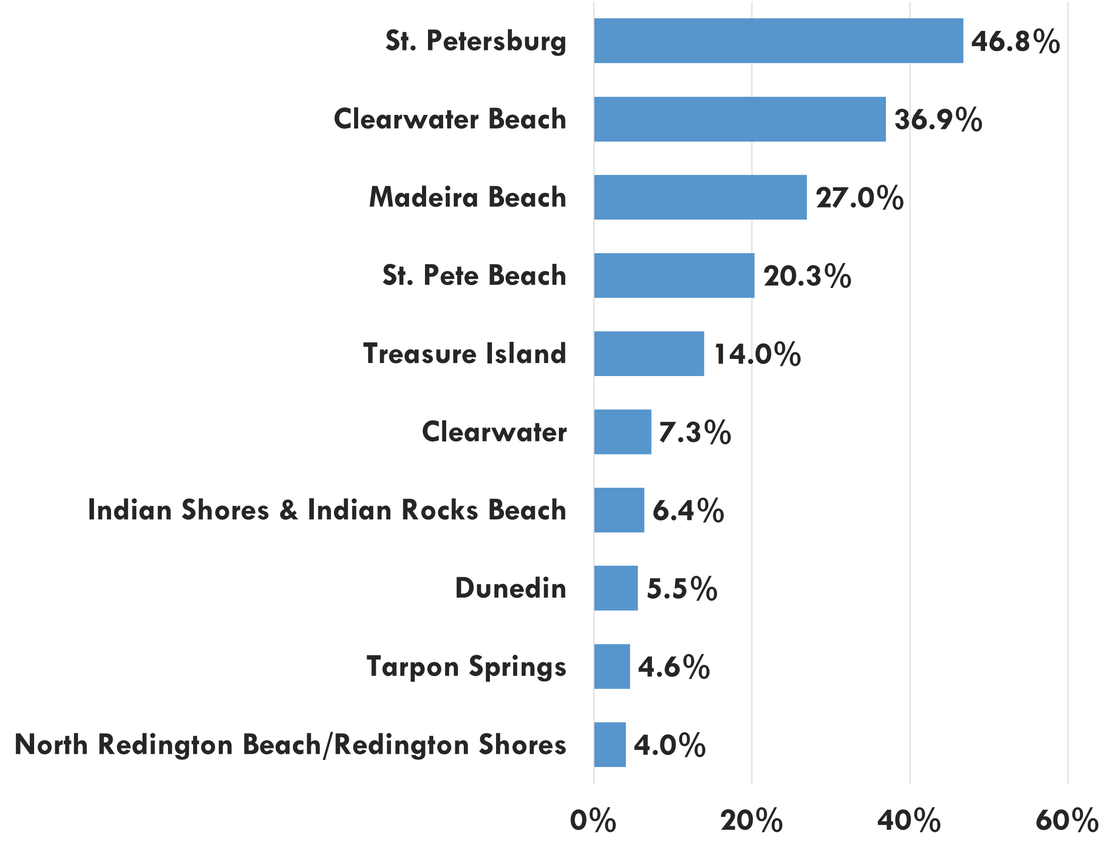
Question: Which of these attractions did you (or will you) visit while on this trip? (Select all that apply) Base: All Respondents. 1,395 responses.

TOP COMMUNITIES VISITED

The most frequented Pinellas County communities were St. Petersburg (46.8% — up from 36.7% in Q2 2019), Clearwater Beach (36.9% -- down from 47.7% in Q2 2019) and Madeira Beach (27.0%). Other top communities visited were St. Pete Beach (20.3%) and Treasure Island (14.0%), followed by Clearwater (7.3%), Indian Shores & Indian Rocks Beach (6.4%), Dunedin (5.5%), Tarpon Springs (4.6%) and North Redington Beach/Redington Shores (4.0%).

Detail by type of visitor is presented on the following page.

Figure 19: Top Communities Visited



Question: Which of the following communities in the St. Pete/Clearwater area did you visit? (Show list. Select all that apply) Base: All Respondents. 1,395 responses.

COMMUNITIES VISITED – FULL DETAIL

	Total	Hotel	VFR	Day Trip
St. Petersburg	46.8%	34.5%	61.7%	**48.0%**
Clearwater Beach	36.9%	**56.1%**	43.9%	**28.9%**
Madeira Beach	27.0%	23.4%	42.2%	17.1%
St. Pete Beach	20.3%	27.3%	36.7%	10.6%
Treasure Island	14.0%	13.5%	26.3%	3.8%
Clearwater	7.3%	11.2%	21.7%	3.9%
Indian Shores & Indian Rocks Beach	6.4%	4.5%	14.3%	1.1%
Dunedin	5.5%	6.0%	16.9%	3.6%
Tarpon Springs	4.6%	2.5%	14.1%	3.3%
North Redington Beach/Redington Shores	4.0%	3.6%	11.1%	0.3%
Pass-A-Grille Beach	3.4%	3.6%	5.8%	1.0%
Gulfport	1.9%	1.3%	7.6%	0.5%
Largo	1.4%	2.4%	9.0%	0.6%
Seminole	1.3%	0.8%	6.0%	0.6%
Tierra Verde	1.2%	2.8%	0.9%	0.0%
Palm Harbor	1.2%	0.8%	5.8%	0.9%
Pinellas Park	0.9%	0.2%	3.5%	0.9%
Oldsmar	0.7%	0.5%	0.9%	0.3%
Safety Harbor	0.5%	0.3%	2.5%	0.2%
Sample Size:	**1,395**	**479**	**214**	**369**

Interesting differences seen amongst visitor types:

- Clearwater Beach remains the community hotel guests were most likely to have visited during their trip to the St. Pete/Clearwater area (56.1%).
- Meanwhile, VFRs were the likeliest segment to have visited all of Pinellas County communities except for Clearwater Beach and Tierra Verde.
- Day trip visitors were most likely to have visited St. Petersburg (48.0%) and Clearwater Beach (28.9%) during their time in Pinellas County.

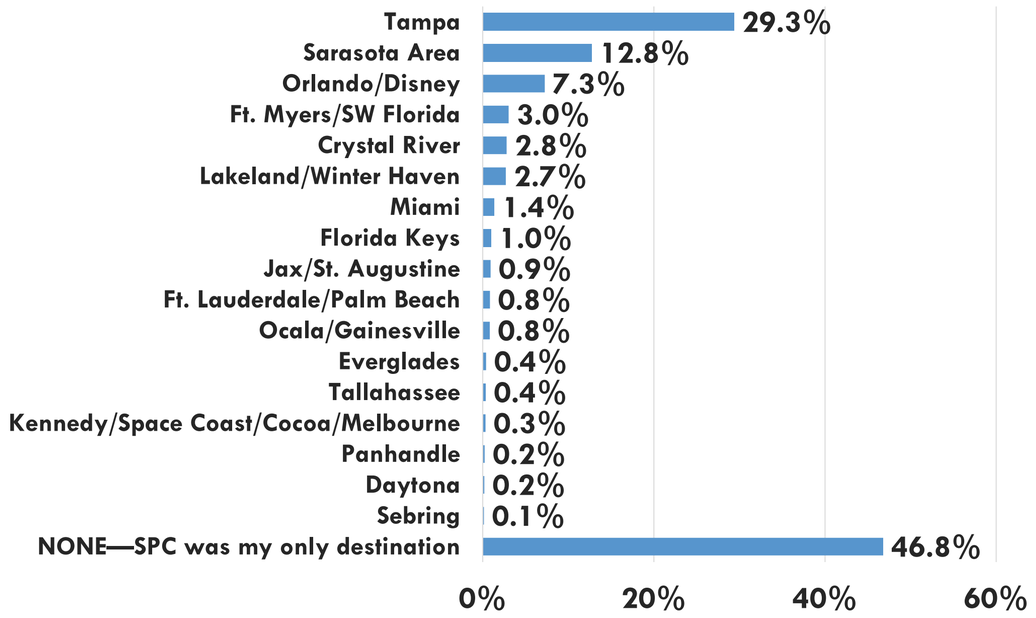
Question: Which of the following communities in the St. Pete/Clearwater area did you visit? (Show list. Select all that apply)

Base: All Respondents. 1,395 responses.

OTHER DESTINATIONS VISITED

Over half of all visitors made trips to other regional areas outside of Pinellas County as part of their trip to St. Pete/Clearwater area (53.2% -- down slightly from 58.5% in Q2 2019). Provided with a list of areas outside St. Pete/Clearwater, visitors selected those which they had visited or planned to visit as part of their current trip. Amongst the areas tested, respondents were again likeliest to have visited Tampa (29.3%), the Sarasota area (12.8%) and/or Orlando/Disney (7.3%). St. Pete/Clearwater was the only destination for nearly half of all segments combined (46.8% -- up from 41.5% in Q2 2019), and the only destination for 66.5 percent of hotel guests and for 60.4 percent of VFRs.

Figure 20: Other Destinations Visited on St. Pete/Clearwater Trip



Question: Which of these other destinations did you visit while on this trip? (Select all that apply) Base: All Respondents. 1,395 responses.

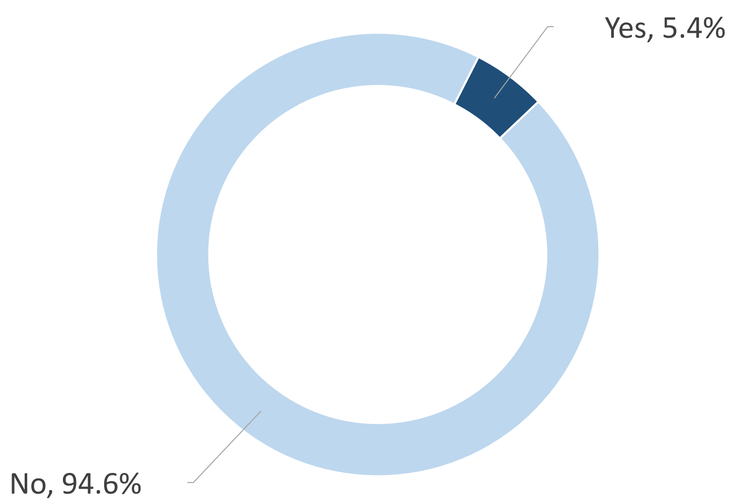
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Tampa	20.7%	25.1%	31.2%
Sarasota Area	6.8%	5.7%	15.8%
Orlando/Disney	3.5%	4.1%	9.0%
Ft. Myers/SW Florida	2.6%	1.1%	3.3%
Crystal River	0.5%	1.8%	4.0%
Lakeland/Winter Haven	0.0%	1.4%	4.1%
Miami	1.6%	0.9%	1.6%
Florida Keys	1.1%	0.2%	0.9%
Jax/St. Augustine	1.0%	1.4%	0.6%
Ft. Lauderdale/Palm Beach	0.8%	0.9%	0.9%
Ocala/Gainesville	0.7%	0.0%	0.9%
Everglades	0.5%	0.0%	0.4%
Tallahassee	0.4%	0.2%	0.2%
Kennedy/Space Coast/Cocoa/Melbourne	1.5%	0.7%	0.0%
Panhandle	0.2%	0.9%	0.0%
Daytona	0.0%	0.7%	0.2%
Sebring	0.0%	0.2%	0.2%
NONE—SPC was my only destination	66.5%	60.4%	38.7%
Sample Size:	**479**	**214**	**369**

FIRST-TIME VISIT TO FLORIDA

Only 5.4 percent of all St. Pete/Clearwater area visitors surveyed in Q2 2021 were in the state of Florida for the first time (down from 8.1% in Q2 2019). Nearly equal proportions of hotel guests, VFRs and day trippers had previous visits to Florida.

Figure 21: First-Time Visitors to Florida



Detail by Traveler Segment

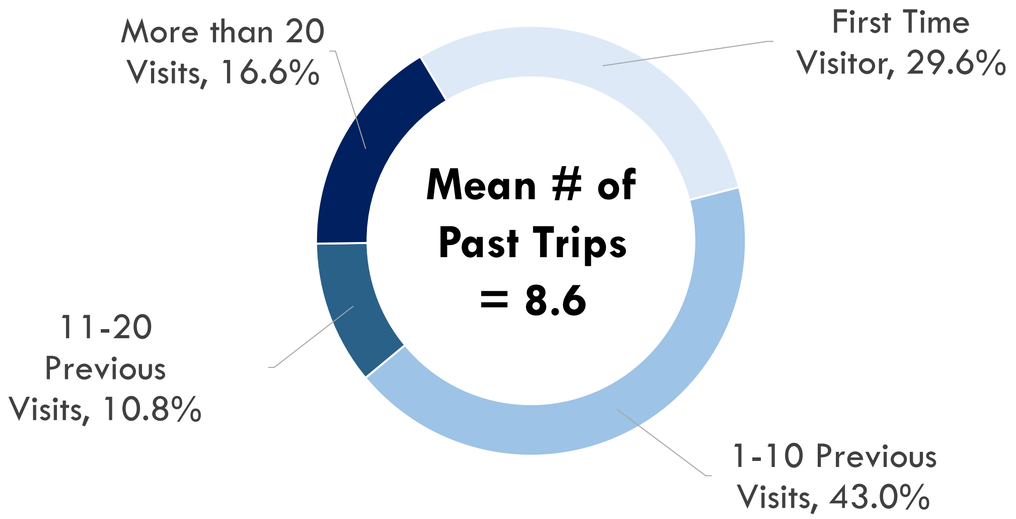
	Hotel	VFR	Day Trip
Yes	5.5%	5.4%	5.3%
No	94.5%	94.6%	94.7%
Sample Size:	**477**	**212**	**367**

Question: Is this your first visit to Florida? Base: All Respondents 1,388 responses.

PREVIOUS VISITATION TO ST. PETE/CLEARWATER

Nearly three-in-ten respondents were first-time visitors to the St. Pete/Clearwater area (29.6%). The average St. Pete/Clearwater visitor surveyed had made 8.6 trips to the area previously. Hotel guests were the likeliest of the segments to be first-time visitors to Pinellas County (37.9%). Day trippers reported the most prior visits to the area (averaging 10.8 trips), followed by VFRs who averaged 8.4 prior visits.

Figure 22: Previous Visitation to the St. Pete/Clearwater Area



Question: Prior to this visit, how many times have you been to the St. Pete/Clearwater area?
Base: All Respondents. 1,386 responses.

Detail by Traveler Segment

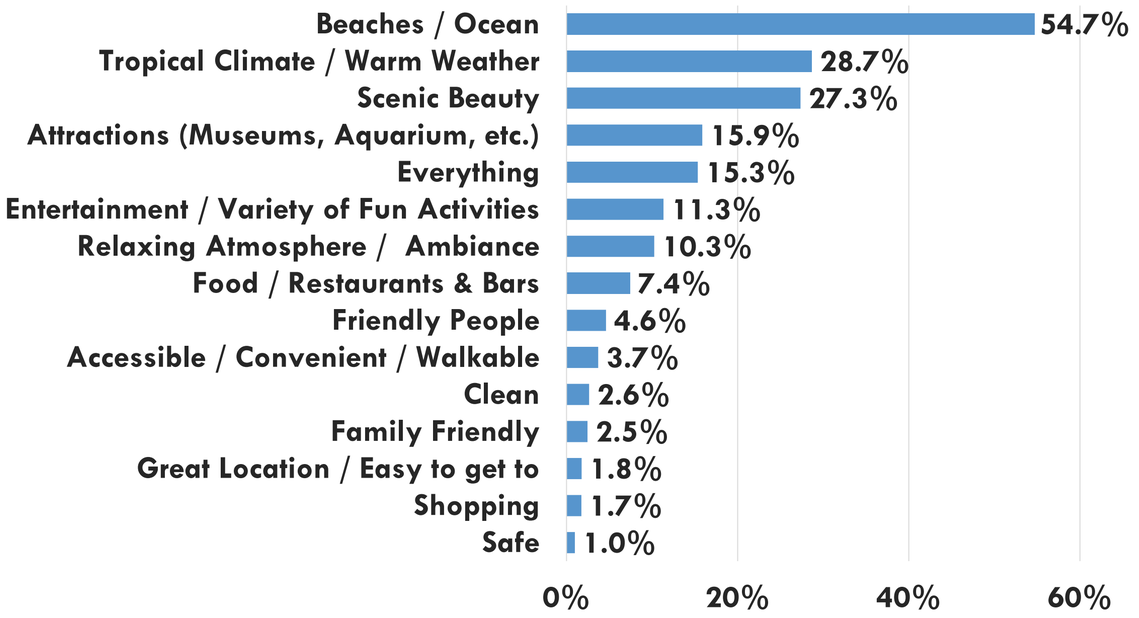
	Hotel	VFR	Day Trip
First-time Visitors	37.9%	16.8%	27.4%
1-10 Previous Visits	50.4%	57.2%	36.7%
11-20 Previous Visits	6.3%	15.0%	13.0%
More than 20 Previous Visits	5.4%	11.0%	22.8%
Mean	**4.3**	**8.4**	**10.8**
Sample Size:	**474**	**212**	**368**

Visitor Satisfaction

MOST LIKED ASPECTS OF ST. PETE/CLEARWATER

Over half of St. Pete/Clearwater visitors said they most liked the destination's beaches (54.7%), followed by tropical climate/weather (28.7%) and scenic beauty (27.3%). Additional top responses included area attractions (15.9%) and everything (15.3%). Hotel guests and VFRs were the likeliest to say they most liked the beaches (68.0% and 64.0%, respectively). While VFRs were the segment most inclined to like the weather (52.4%), day trip visitors were likeliest to cite area attractions as a well-liked aspect (20.8%) .

Figure 23: Most Liked Aspects of St. Pete/Clearwater (Unaided)



Question: What do you like most about the St. Pete/Clearwater area?
Base: All Respondents. 1,395 responses.

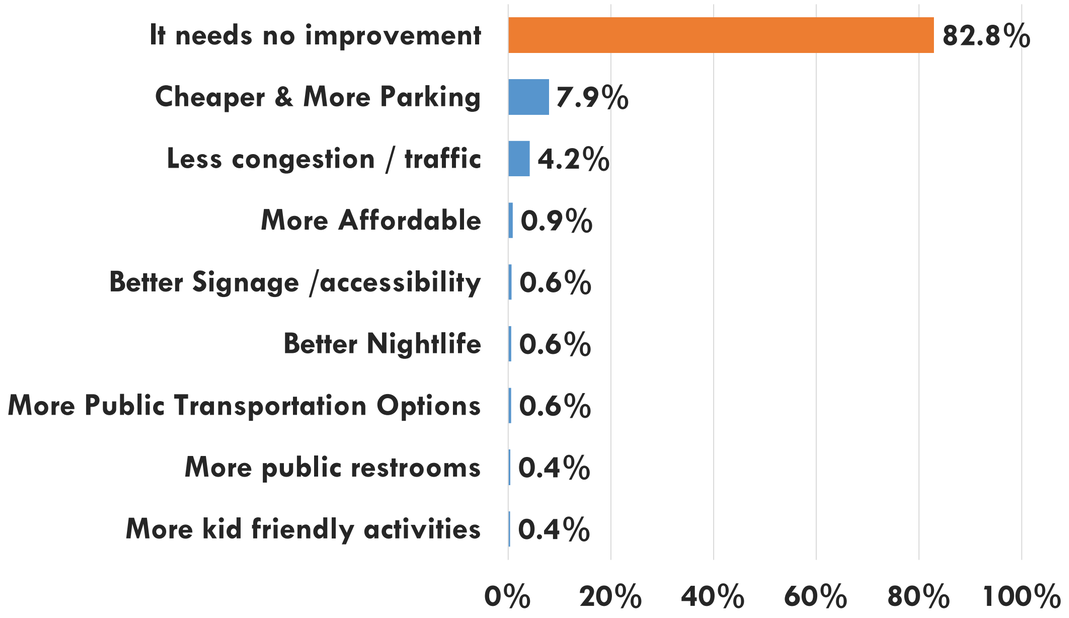
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Beaches / Ocean	68.0%	64.0%	45.0%
Tropical Climate / Warm Weather	37.7%	52.4%	18.2%
Scenic Beauty	30.3%	36.9%	22.8%
Attractions (Museums, Aquarium, etc.)	9.8%	5.6%	20.8%
Everything	13.3%	14.5%	15.9%
Entertainment / Variety of Fun Activities	9.6%	8.1%	13.1%
Relaxing Atmosphere / Ambiance	11.8%	10.2%	8.3%
Food / Restaurants & Bars	5.1%	7.7%	8.7%
Friendly People	3.4%	6.9%	5.0%
Accessible / Convenient / Walkable	10.9%	2.8%	2.0%
Clean	4.6%	0.9%	2.1%
Family Friendly	3.0%	4.4%	1.6%
Great Location / Easy to get to	2.0%	1.6%	1.8%
Shopping	1.2%	3.0%	1.5%
Safe	0.9%	0.0%	1.0%
Sample Size:	**479**	**214**	**369**

ATTRACTIONS OR SERVICES THAT WOULD ENHANCE THE DESTINATION EXPERIENCE

When asked what services or additional attractions would enhance the visitor experience in the St. Pete/Clearwater area, over eight-in-ten visitors reported that the destination needs no improvements (82.8%). Of the specific suggestions provided by area visitors, the top cited were cheaper/more parking (7.9%) and less congestion/traffic (4.2%).

Figure 24: Additional Attractions or Services (Unaided)



Question: In your opinion, what services or additional attractions would most enhance your experience in the St. Pete/Clearwater Area? Base: All Respondents. 1,395 responses.

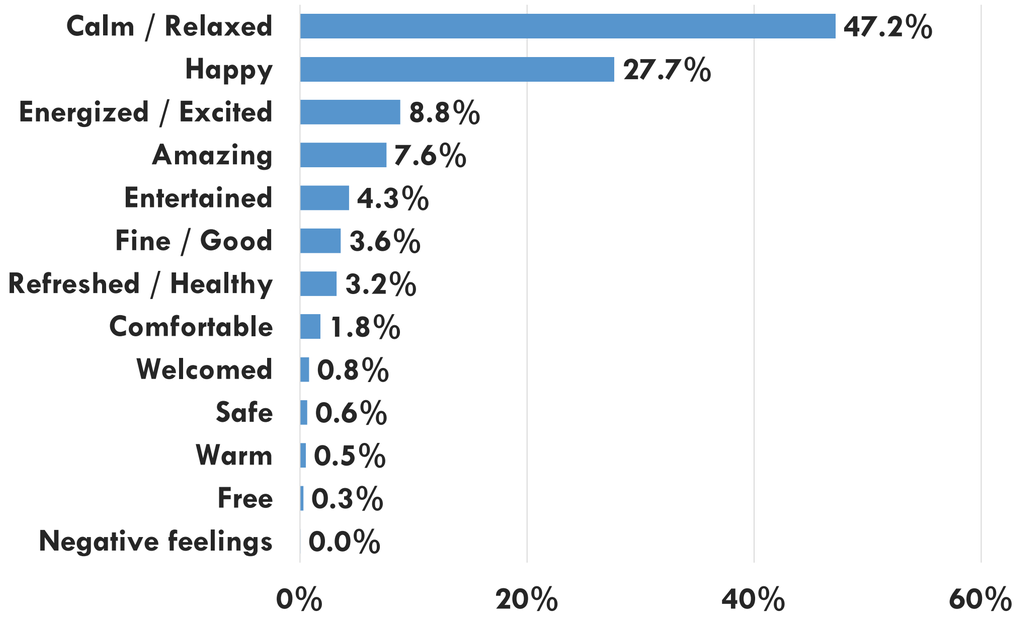
Detail by Traveler Segment

	Hotel	VFR	Day Trip
It needs no improvement	83.0%	88.2%	82.3%
Cheaper & More Parking	2.6%	3.5%	10.5%
Less congestion / traffic	4.1%	7.1%	4.1%
More Affordable	1.5%	1.9%	0.6%
Better Signage /accessibility	0.0%	0.0%	1.0%
Better Nightlife	1.0%	0.2%	0.5%
More Public Transportation Options	0.7%	0.0%	0.5%
More public restrooms	0.6%	0.0%	0.3%
More kid friendly activities	0.5%	0.2%	0.2%
Sample Size:	**479**	**214**	**369**

FEELINGS IN ST. PETE/CLEARWATER

When asked in an open-ended format what word or phrase best describes how they feel in the area, St. Pete/Clearwater visitors reported mostly feeling calm & relaxed (47.2%) and happy (27.7%). Hotel guests and VFR were the likeliest segments to report feelings of calmness or relaxation (67.2% and 61.7%, respectively). While day trip visitors also reported feeling calm & relaxed (34.4%), they were slightly more likely to feel happy (35.8%) and the likeliest to feel energized/excited (11.1%) while in the destination.

Figure 25: Feelings in St. Pete/Clearwater Area (Unaided)



Question: What one word or phrase best describes how you feel in the St. Pete/Clearwater area? Base: All Respondents. 1,395 responses.

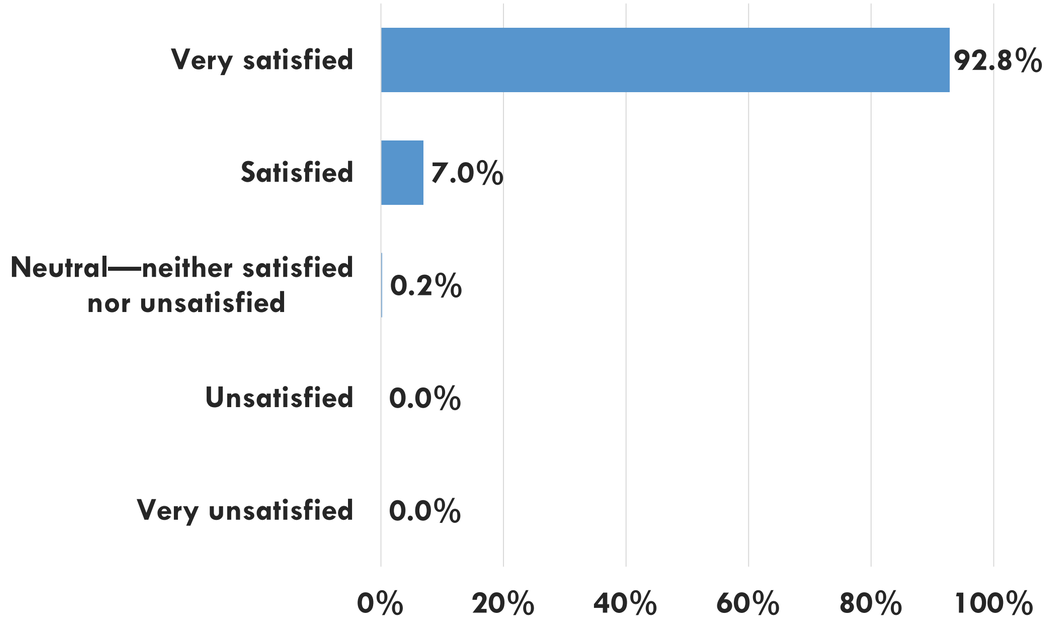
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Calm / Relaxed	67.2%	61.7%	34.4%
Happy	13.7%	22.4%	35.8%
Energized / Excited	5.8%	3.9%	11.1%
Amazing	6.3%	8.1%	8.5%
Entertained	2.5%	1.6%	5.7%
Fine / Good	3.2%	3.0%	3.9%
Refreshed / Healthy	3.3%	3.2%	2.8%
Comfortable	1.4%	0.7%	1.7%
Welcomed	1.0%	0.7%	0.7%
Safe	0.3%	0.7%	0.9%
Warm	0.3%	0.0%	0.6%
Free	0.6%	0.0%	0.2%
Negative feelings	0.2%	0.0%	0.0%
Sample Size:	**479**	**214**	**369**

OVERALL SATISFACTION

St. Pete/Clearwater visitors continued to be highly satisfied with their visitor experience (99.8%). Virtually all visitors said they were either satisfied (7.0%) or very satisfied (92.8%) with their experience in the destination.

Figure 26: Overall Satisfaction



Question: How satisfied are you with your experience in the St. Pete/Clearwater area on this trip? (Select one) Base: All Respondents. 1,389 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Very satisfied	93.3%	91.6%	92.4%
Satisfied	6.5%	7.9%	7.4%
Neutral—neither satisfied nor unsatisfied	0.2%	0.5%	0.2%
Unsatisfied	0.0%	0.0%	0.0%
Very unsatisfied	0.0%	0.0%	0.0%
Sample Size:	**476**	**212**	**368**

LIKELIHOOD TO RECOMMEND

Consistent with the high level of reported satisfaction, visitors were also likely to say they would recommend the St. Pete/Clearwater area as a travel destination to others. The average visitor rated their likelihood to recommend the destination a 9.8 out of 10.

Figure 27: Likelihood to Recommend St. Pete/Clearwater Area

Question: How likely are you to recommend the St. Pete/Clearwater area as a place to visit to other travelers? Please use a 10-point scale where 1 represents "Definitely will NOT recommend" and 10 represents "Certain to recommend." Base: All Respondents. 1,393 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
10—Certain to Recommend	87.5%	84.3%	85.9%
9	5.4%	8.1%	7.0%
8	4.6%	6.1%	5.6%
7	2.2%	1.2%	0.9%
6	0.3%	0.0%	0.0%
5	0.0%	0.3%	0.6%
4	0.0%	0.0%	0.0%
3	0.0%	0.0%	0.0%
2	0.0%	0.0%	0.0%
1—Definitely WILL NOT Recommend	0.0%	0.0%	0.0%
Mean Score	**9.7**	**9.8**	**9.8**
Sample Size:	**479**	**212**	**369**

LIKELIHOOD TO RETURN

Visitors also reported a high likelihood to return to the destination in the future. Similar to their likelihood to recommend the St. Pete/Clearwater area as a place to visit to other travelers, the average visitor rated their likelihood to return to the destination as a 9.6 out of 10.

Figure 28: Likelihood to Return to St. Pete/Clearwater Area

Question: How likely are you to return to the St. Pete/Clearwater area? Please use a 10-point scale where 1 represents "Definitely will NOT return" and 10 represents "Certain to return."
Base: All Respondents. 1,377 responses.

Detail by Traveler Segment

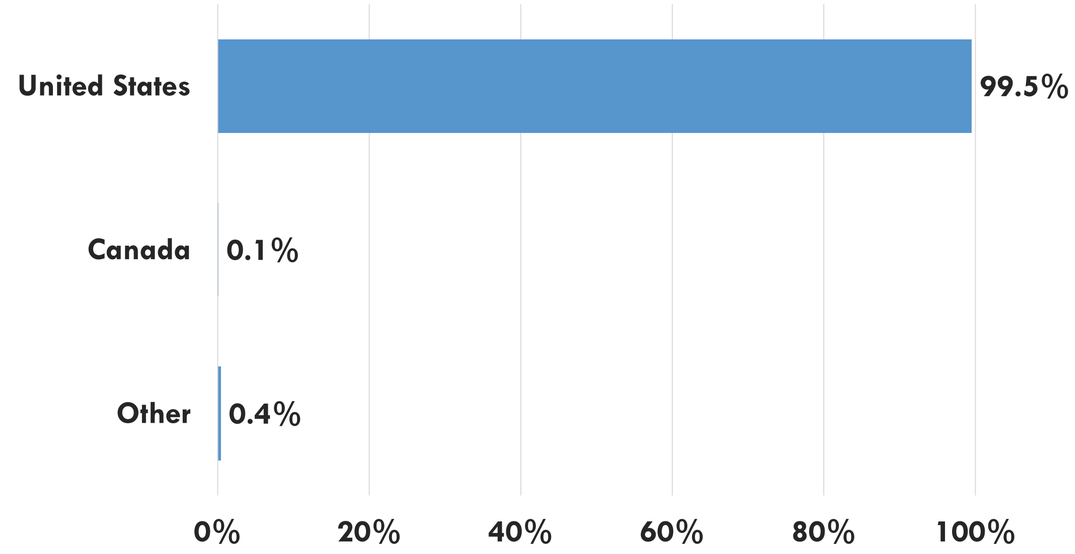
	Hotel	VFR	Day Trip
10—Certain to Return	80.2%	92.6%	87.7%
9	4.6%	3.1%	3.8%
8	4.3%	2.1%	3.8%
7	4.7%	0.7%	1.2%
6	2.2%	0.2%	1.2%
5	3.5%	1.2%	1.6%
4	0.3%	0.0%	0.2%
3	0.0%	0.0%	0.3%
2	0.0%	0.0%	0.0%
1—Definitely WILL NOT Return	0.2%	0.0%	0.0%
Mean Score	**9.4**	**9.8**	**9.7**
Sample Size:	**475**	**208**	**365**

Q2 2021
Point of Origin & Demographic Profile

POINT OF ORIGIN: COUNTRY

In Q2 2021, nearly all St. Pete/Clearwater visitors surveyed resided in the United States (99.5%), while 0.5 percent were international residents.

Figure 29: Country of Origin



Detail by Traveler Segment

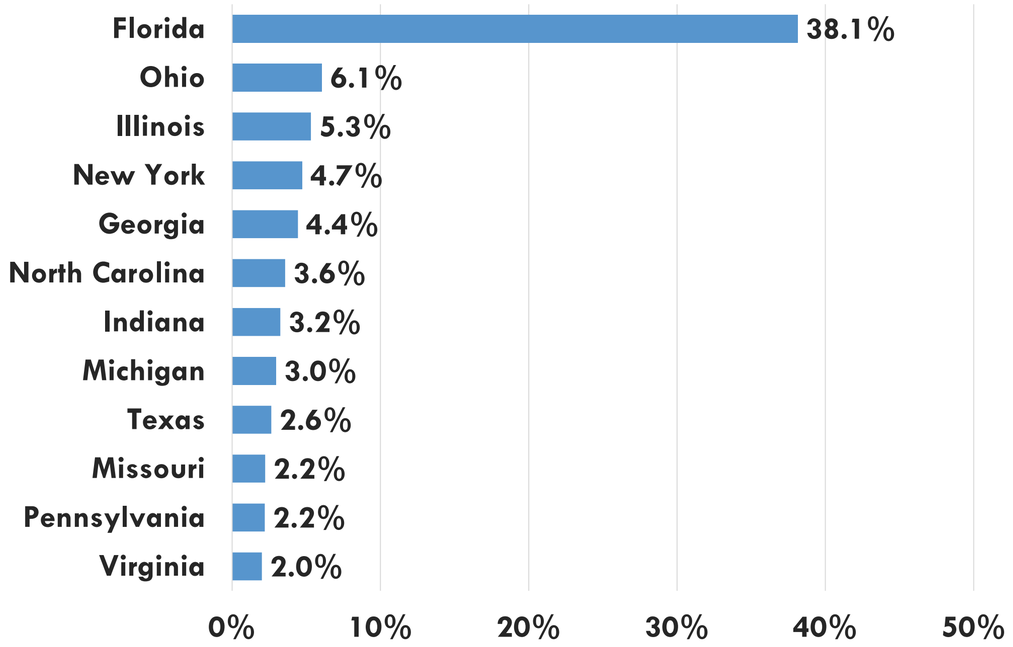
	Hotel	VFR	Day Trip
United States	99.4%	98.6%	99.8%
Canada	0.0%	0.7%	0.0%
Other	0.6%	0.7%	0.2
Sample Size:	**470**	**208**	**361**

Question: In what country do you reside? Base: All Respondents.1,368 responses.

POINT OF ORIGIN: TOP STATES OF RESIDENCE (DOMESTIC VISITORS)

Four-in-ten domestic visitors surveyed in Q2 2021 reside within the state of Florida (38.1%). In total, 61.9 percent of domestic visitors were out-of-state residents—up from 50.8% in Q4 2020. Ohio (6.1%), Illinois (5.3%), New York (4.7%), Georgia (4.4%), North Carolina (3.6%), Indiana (3.2%) and Michigan (3.0%) contributed the largest proportions of out-of-state visitors. The likeliest segments to reside outside of Florida were VFRs (19.7%) and hotel guests (19.5%).

Figure 30: State of Origin



Question: What is your zip/postal code? Base: Domestic respondents. 1,314 responses.

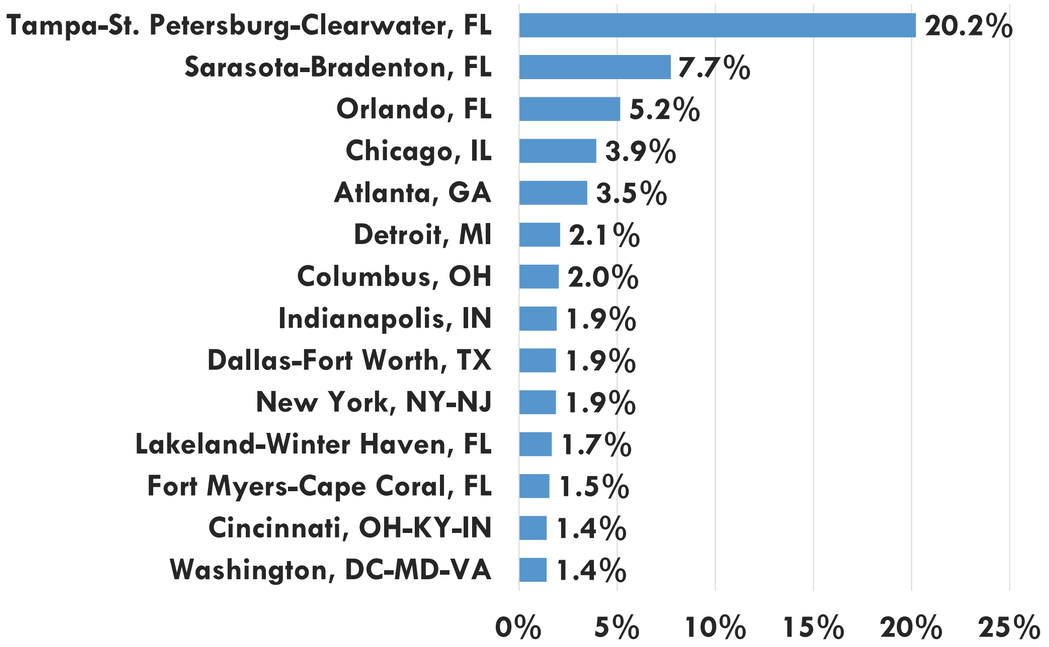
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Florida	19.5%	19.7%	51.4%
Ohio	7.0%	5.5%	4.5%
Illinois	9.3%	5.6%	3.9%
New York	7.1%	10.3%	3.0%
Georgia	5.3%	2.5%	4.2%
North Carolina	1.6%	2.8%	4.2%
Indiana	4.4%	5.8%	1.4%
Michigan	3.6%	5.0%	1.5%
Texas	3.2%	1.8%	2.7%
Missouri	0.8%	2.3%	2.6%
Pennsylvania	3.6%	3.8%	1.1%
Virginia	4.5%	2.5%	1.5%
Sample Size:	**455**	**195**	**352**

POINT OF ORIGIN: MSA (DOMESTIC VISITORS)

Tampa (20.2%), Sarasota-Bradenton (7.7%) and Orlando (5.2%) were the top domestic visitor markets. Other common out-of-state markets during the second quarter of 2021 were Chicago (3.9%), Atlanta (3.5%), Detroit (2.1%) and Columbus (2.0%).

Figure 31: MSA



Question: What is your zip/postal code? Base: Domestic respondents. 1,132 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Tampa-St. Petersburg-Clearwater, FL	3.3%	4.1%	30.0%
Sarasota-Bradenton, FL	2.6%	2.1%	10.9%
Orlando, FL	5.6%	4.4%	5.7%
Chicago, IL	6.3%	4.5%	3.0%
Atlanta, GA	4.0%	2.7%	3.5%
Detroit, MI	2.4%	3.5%	0.6%
Columbus, OH	1.1%	1.2%	1.6%
Indianapolis, IN	2.5%	3.8%	0.6%
Dallas-Fort Worth, TX	1.2%	1.2%	2.3%
New York, NY-NJ	2.9%	2.1%	1.1%
Lakeland-Winter Haven, FL	0.2%	1.2%	2.4%
Fort Myers-Cape Coral, FL	0.5%	0.0%	2.2%
Cincinnati, OH-KY-IN	2.3%	1.2%	1.0%
Washington, DC-MD-VA	2.7%	1.5%	1.0%
Sample Size:	**385**	**168**	**315**

DEMOGRAPHIC PROFILE

The following presents the demographic profile for all St. Pete/Clearwater area visitors surveyed in Q2 of 2021.

Average Age

47.4 years old

Household Income

$108,907

Ethnicity

Caucasian – 87.3%

Latino/Hispanic – 5.3%

Black/African American – 4.2%

Gender*

Female: 71.6%

Male: 28.1%

Marital Status

Single: 29.4%

Married/partnered: 66.1%

Children under 18: 19.7%

Orientation

Heterosexual – 96.9%

LGBTQ – 2.8%

Other – 0.0%

**Important Note: The gender breakout displayed above accurately reflects the profile of visitors who completed the Visitor Intercept Survey in-market but may not reflect the average ratio of female and male visitors. It should be noted that female visitors have been statistically more likely than male visitors to complete the survey in-market.*

DEMOGRAPHIC PROFILE BY VISITOR SEGMENT

The following presents the demographic profiles for place of stay visitor segments surveyed in Q2 of 2021.

	Hotel	VFR	Day Trip
Female	67.5%	71.4%	72.4%
Male	32.1%	28.6%	27.4%
Mean Age	49.2	45.8	47.0
Single	76.3%	57.2%	59.9%
Married	20.4%	37.9%	35.0%
Has Children	20.5%	19.1%	19.1%
Annual Household Income	$128,505	$95,768	$101,544

	Hotel	VFR	Day Trip
Caucasian	90.0%	90.7%	84.8%
Latino/Hispanic	4.3%	6.0%	6.1%
Black/African-American	2.8%	2.1%	5.2%
Asian/Pacific Islander	1.8%	0.7%	2.9%
American Indian/Alaska Native	0.0%	0.0%	0.0%
Other	1.1%	0.5%	0.9%
Heterosexual	97.9%	95.3%	96.4%
LGBTQ	1.5%	4.2%	3.4%