ST.PETE CLEARWATER

Visit St. Pete/Clearwater

VISITOR PROFILE STUDY

Report of Findings
Q1 2022

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 January 2022 — March 2022.

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, 1,325 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
- 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
- The James Museum
- Tradewinds Island Grand
- 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.*

Q1 2022
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).

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.

Economic Impact Estimates: Key Findings – Q1 2022

The following presents the key findings related to the economic impact of tourism to Pinellas County from January 2022 – March 2022.

	January 2022	February 2022	March 2022	Q1 (January 2022 – March 2022)
Visitors to Pinellas County	1,349,184	1,457,211	1,467,808	4,274,203
Direct Visitor Spending in Pinellas County	$574,932,562	$597,704,774	$675,736,216	$1,848,373,551
Total Economic Impact of Tourism to Pinellas County	$920,556,991	$955,159,256	$1,108,510,449	$2,984,226,696
Tax Revenues Generated for Pinellas County	$33,067,291	$36,631,769	$46,719,447	$116,418,507
Hotel Room Nights	494,562	573,705	680,427	1,748,694
Visitor Industry Payroll	$297,974,527	$308,862,332	$350,338,659	$957,175,518
Jobs Supported	9,215	9,491	10,608	29,314

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 January 2022 – March 2022

- **Visitors to Pinellas County** - Pinellas County had a total of 4.2 million visitors between January 2022 – March 2022. The largest segment of Pinellas County's visitor volume this quarter is day trip visitors from outside the surrounding region, comprising 1.2 million visitors, or 30 percent of all visitors.

- **Direct Visitor Spending in Pinellas County** - The Pinellas County tourism industry generated $1.85 billion in direct visitor spending inside the county from January 2022 –March 2022. The largest share of this spending was generated by hotel guests who stayed overnight in commercial lodging. These visitors were responsible for $878 million in visitor spending, or 47 percent of the total.

- **Total Economic Impact of Tourism to Pinellas County** – Tourism generated a total of $2.98 billion in economic impact for Pinellas County during January 2022 –March 2022. The total economic impact is comprised of direct visitor spending, as well as indirect and induced effects.

Economic Impact Estimates: Summary of Key Findings

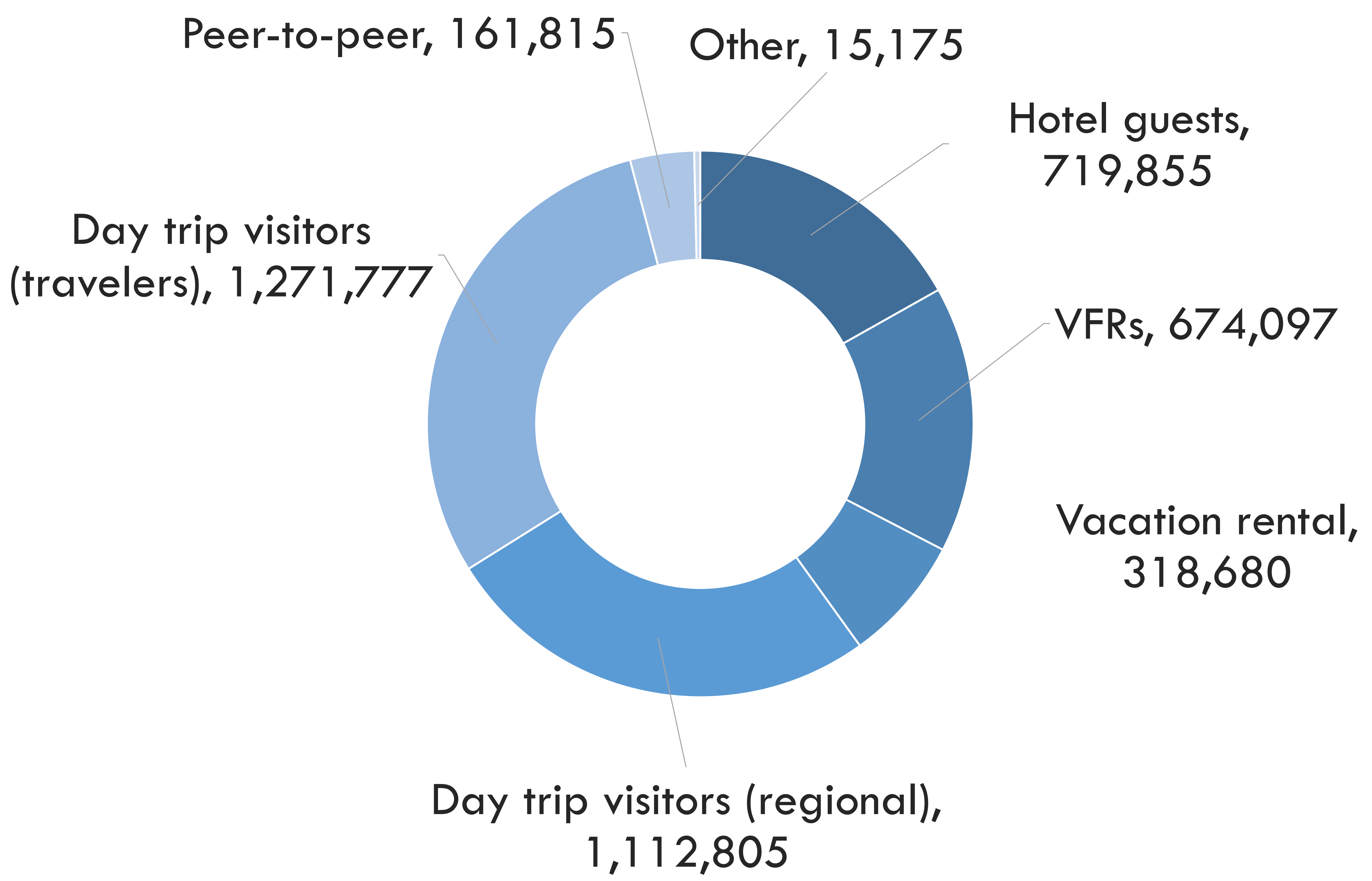
- **Tax Revenues Generated for Pinellas County** – Pinellas County's tourism industry generated $116.4 million in tax revenues for governmental entities from January 2022 – March 2022. Taxes directly generated by the visitor industry include revenues from the transient occupancy tax (hotel tax), sales taxes and property taxes paid on lodging facilities.

- **Hotel Room Nights** – Between January 2022 – March 2022, an estimated 1.74 million hotel room nights were generated in Pinellas County by visitors.

- **Visitor Industry Payroll and Jobs supported** – Between January 2022 – March 2022, the Pinellas County tourism industry had an estimated total combined payroll of $957 million. This is estimated to have supported 29,314 jobs county-wide.

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

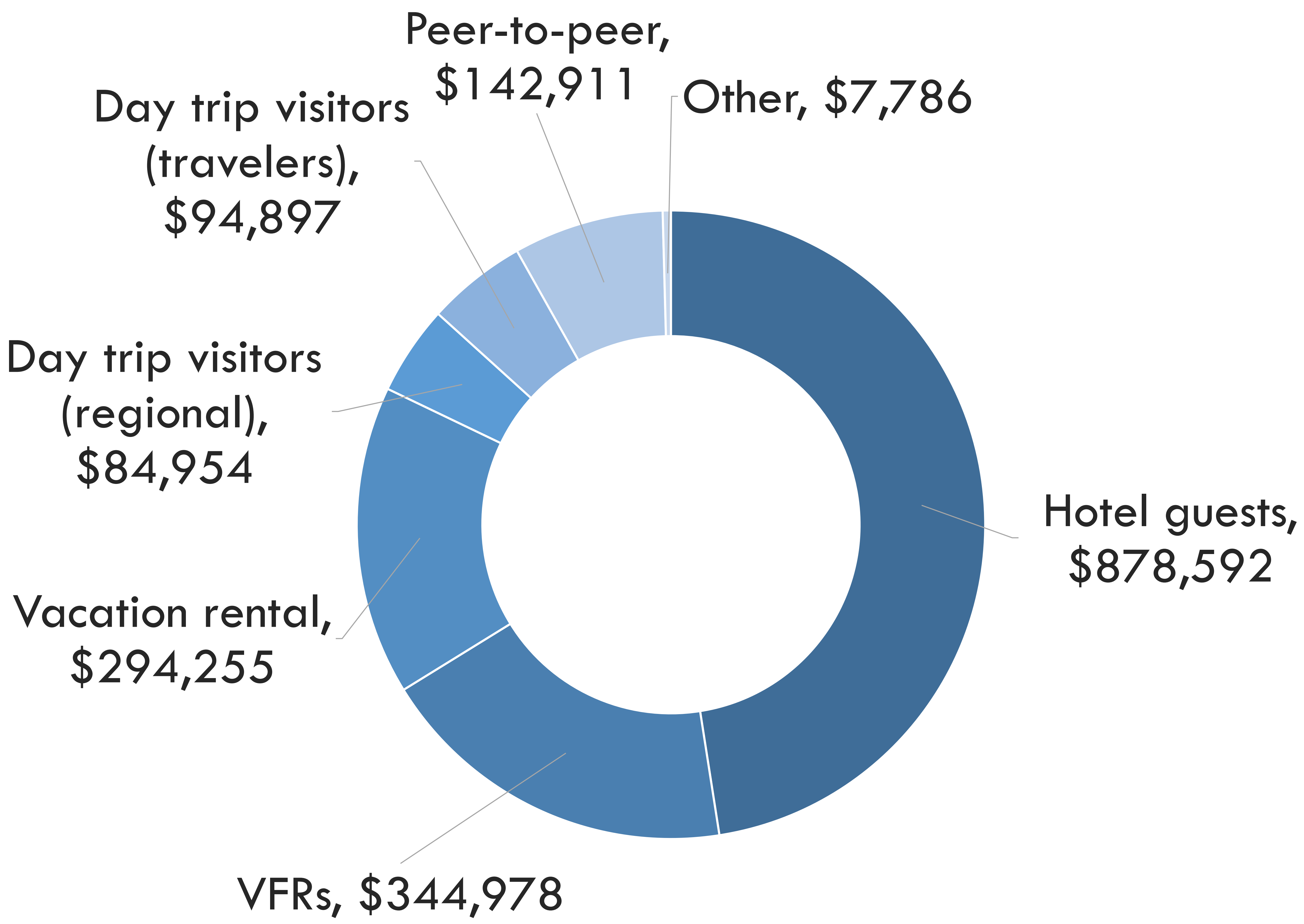
Visitors to Pinellas County



Visitors to Pinellas County, by type of visitor

Hotel guests	719,855
VFRs	674,097
Vacation rental	318,680
Day trip visitors (regional)	1,112,805
Day trip visitors (travelers)	1,271,777
Peer-to-peer	161,815
Other	15,175
TOTAL VISITORS	**4,274,203**

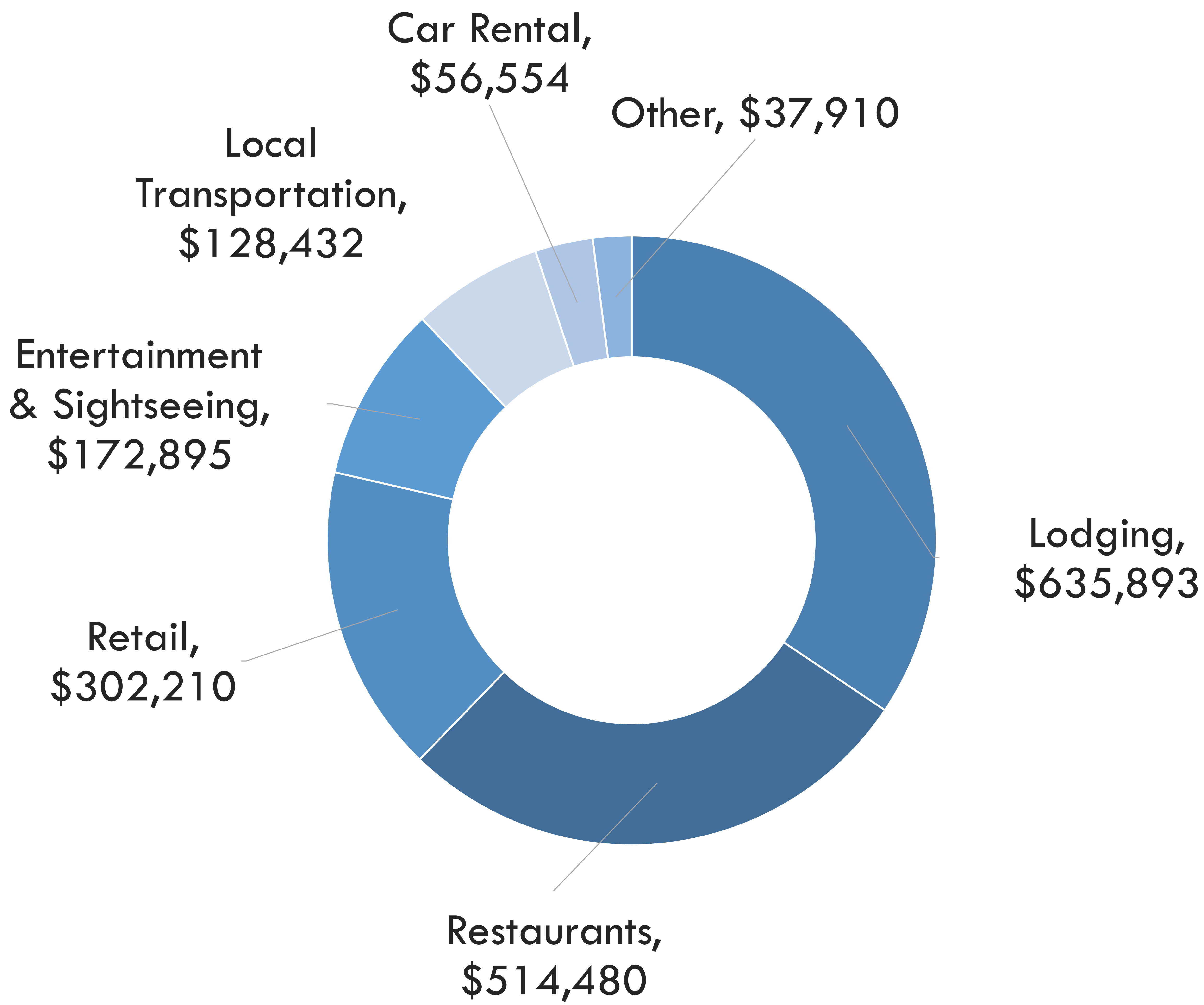
Direct Visitor Spending: By Type of Visitor



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

Hotel guests	$878,592
VFRs	$344,978
Vacation rental	$294,255
Day trip visitors (regional)	$84,954
Day trip visitors (travelers)	$94,897
Peer-to-peer	$142,911
Other	$7,786
TOTAL DIRECT VISITOR SPENDING	**$1,848,374**

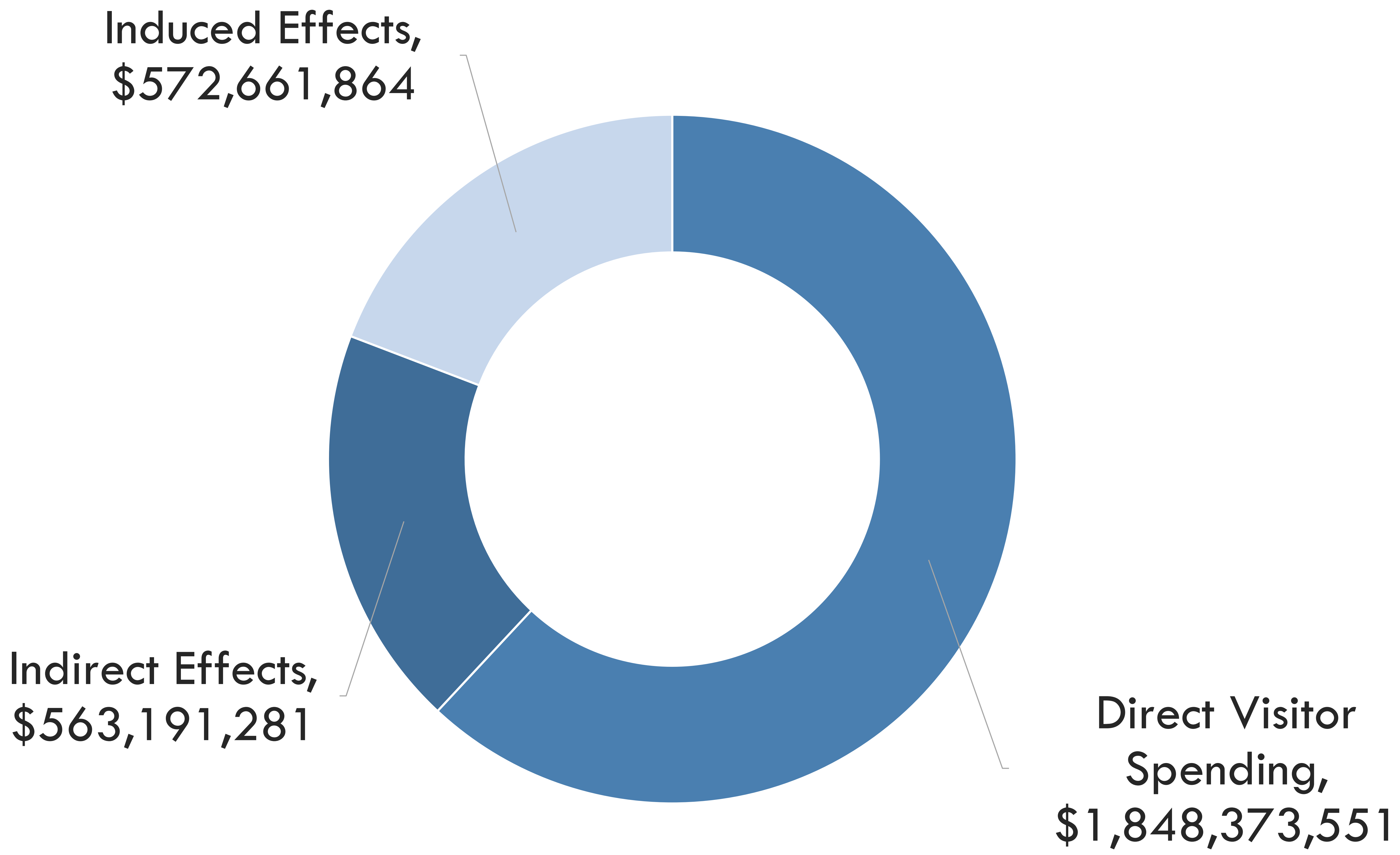
Direct Visitor Spending: By Type of Spending



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

Lodging	$635,893
Restaurants	$514,480
Retail	$302,210
Entertainment & Sightseeing	$172,895
Local Transportation	$128,432
Car Rental	$56,554
Other	$37,910
TOTAL DIRECT VISITOR SPENDING	$1,848,374

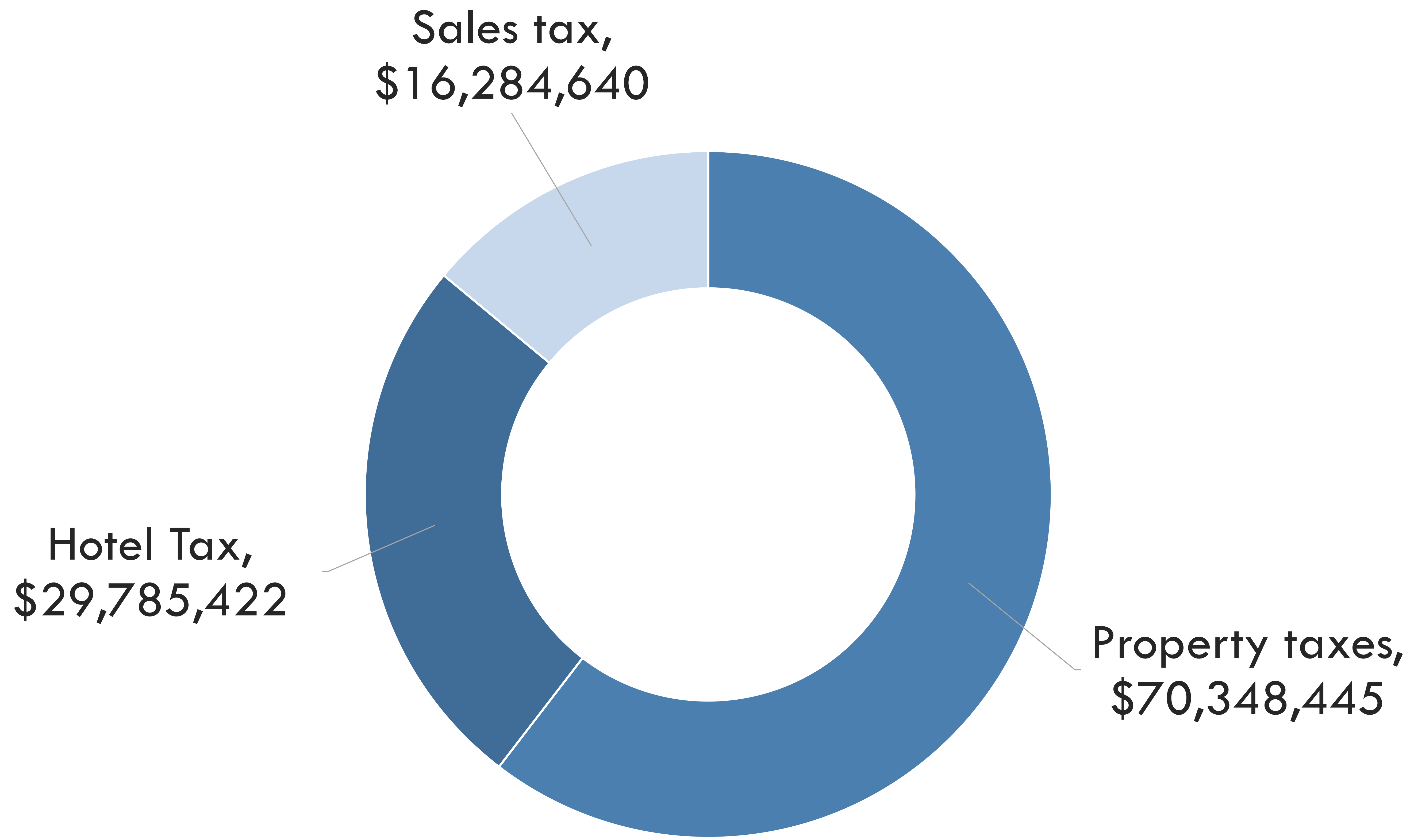
Total Economic Impact



Economic Impact Estimates, by type of effect

Direct Visitor Spending	$1,848,373,551
Indirect Effects	$563,191,281
Induced Effects	$572,661,864
TOTAL ECONOMIC IMPACT	**$2,984,226,696**

Tax Revenues Generated



Tax Revenues Generated, by type of tax

Property taxes	$70,348,445
Hotel Tax	$29,785,422
Sales tax	$16,284,640
TOTAL TAX REVENUES GENERATED	**$116,418,507**

Economic Impact YOY Comparison

The following presents the estimated economic impact of tourism to Pinellas County comparing Q1 2022 to Q1 2021.

- In this first quarter of 2022, the travel and tourism industry showed it's first signs of near-full recovery from the effects and impacts of the COVID-19 pandemic across the nation. Pinellas County saw strong visitor volume growth in Q1 of 2022 (up 22% from 2021). The visitor spending habits that shifted during the pandemic have returned to normal with total economic impact in Q1 estimated to be up 42% from 2021.

- Compared to 2021, all metrics for the quarter show double digit growth year over year and a full return to pre-pandemic levels. Even though this quarter did now show the highest hotel occupancy seen in recent years, due to consistently high average daily rates, Pinellas County has collected record levels of Transient Occupancy Tax (Hotel Tax). In other words, Pinellas County visitor volume is strong, but not the highest the county has seen; In contrast Pinellas County visitors have been spending more in-market this quarter than ever before.

Economic Impact YOY Comparison- Q1 2022 vs. Q1 2021

	January 2021	January 2022	% Change	February 2021	February 2022	% Change
Visitors to Pinellas County	978,903	1,349,184	37.8%	1,113,149	1,457,211	30.9%
Direct Visitor Spending in Pinellas County	$317,215,107	$574,932,562	81.2%	$378,160,441	$597,704,774	58.1%
Total Economic Impact of Tourism to Pinellas County	$516,338,039	$920,556,991	78.3%	$623,212,214	$955,159,256	53.3%
Tax Revenues Generated for Pinellas County	$19,343,431	$33,067,291	70.9%	$24,412,219	$36,631,769	50.1%
Hotel Room Nights	355,354	494,562	39.2%	416,454	573,705	37.8%
Visitor Industry Payroll	$165,638,581	$297,974,527	79.9%	$199,025,328	$308,862,332	55.2%
Jobs Supported	5,210	9,215	76.9%	6,232	9,491	52.3%

Economic Impact YOY Comparison- Q1 2022 vs. Q1 2021

	March 2021	March 2022	% Change	Q1 2021 January 2021– March 2021	Q1 2022 January 2022 – March 2022	% Change
Visitors to Pinellas County	1,412,075	1,467,808	3.9%	3,504,128	4,274,203	22.0%
Direct Visitor Spending in Pinellas County	$582,902,641	$675,736,216	15.9%	$1,278,278,189	$1,848,373,551	44.6%
Total Economic Impact of Tourism to Pinellas County	$962,018,043	$1,108,510,449	15.2%	$2,101,568,296	$2,984,226,696	42.0%
Tax Revenues Generated for Pinellas County	$39,147,908	$46,719,447	19.3%	$82,903,558	$116,418,507	40.4%
Hotel Room Nights	610,403	680,427	11.5%	1,382,211	1,748,694	26.5%
Visitor Industry Payroll	$305,734,373	$350,338,659	14.6%	$670,398,282	$957,175,518	42.8%
Jobs Supported	9,506	10,608	11.6%	20,948	29,314	39.9%

Q1 2022
St. Pete/Clearwater
Visitor Summary

Q1 2022 comparison to Q1 2021 and Q1 2020

VISIT ST. PETE/CLEARWATER *Quarterly Comparison*

Destination Analysts
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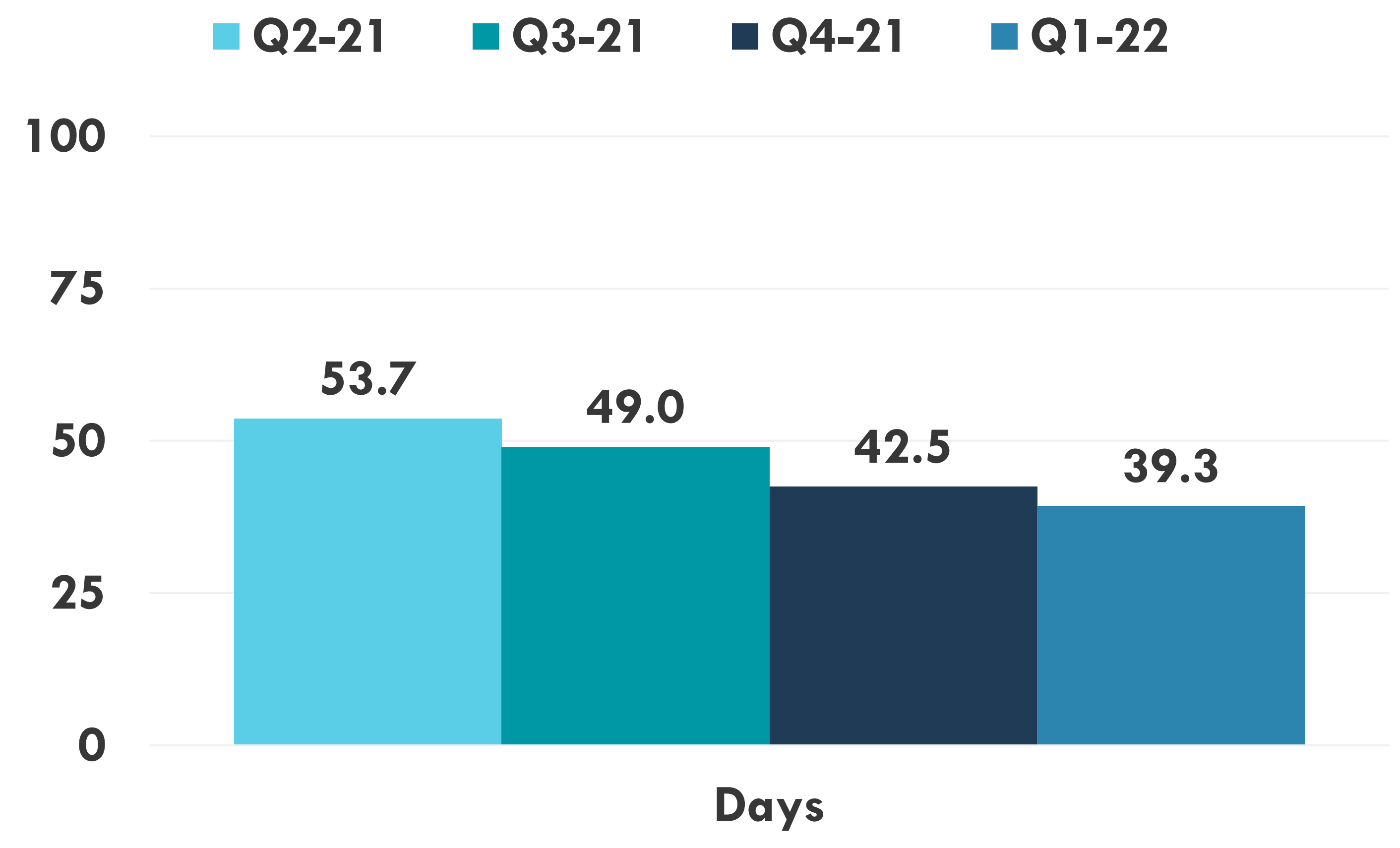
Average Time Between Decision to Visit & Arrival



Average Daily Spending

$264
Q1-22

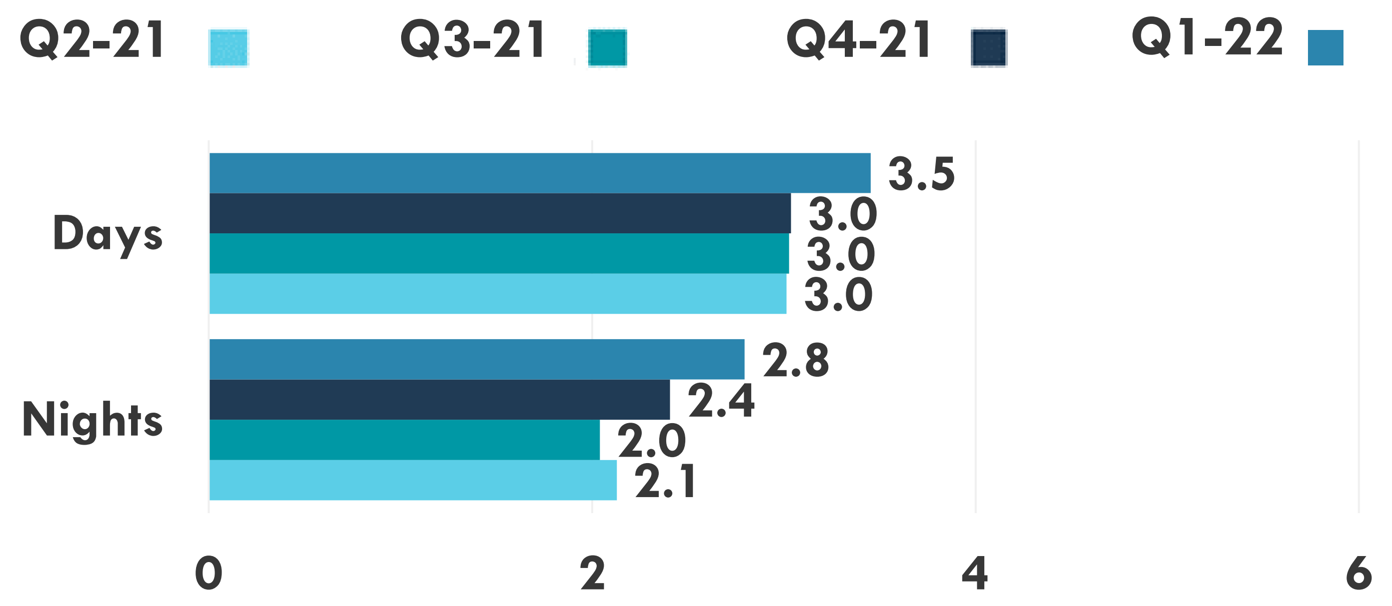
$274	$281	$260
Q2-21	Q3-21	Q4-21

Travel Party Size

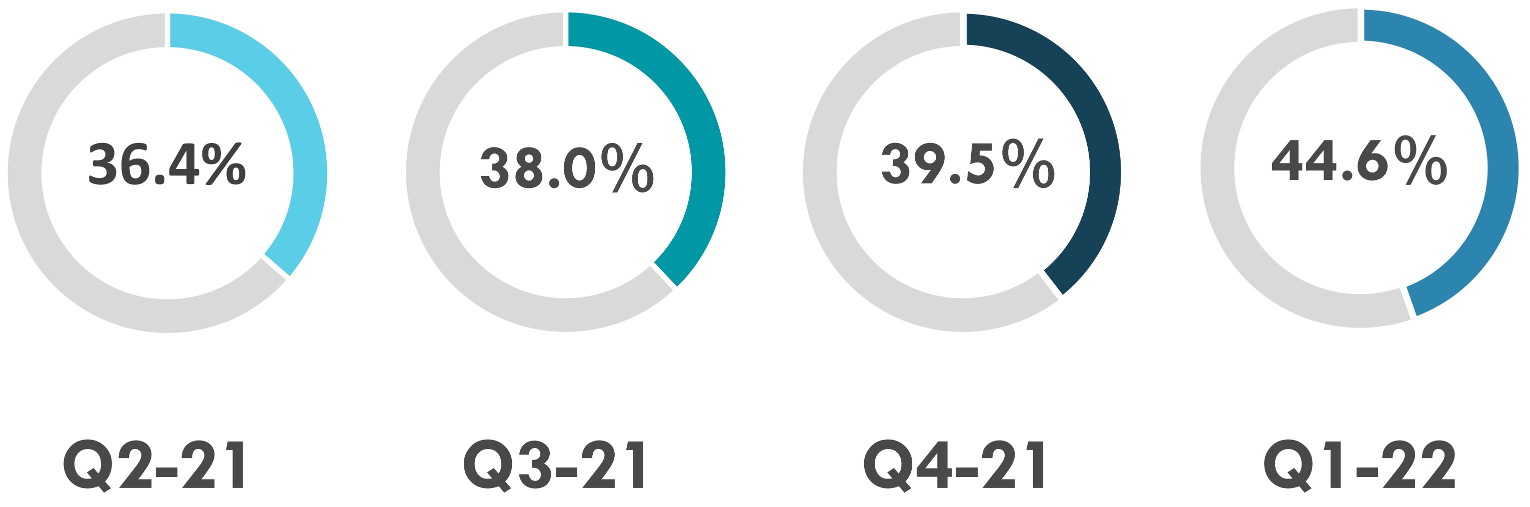
2.2
Q1-22

Q2-21	2.6
Q3-21	2.7
Q4-21	2.3

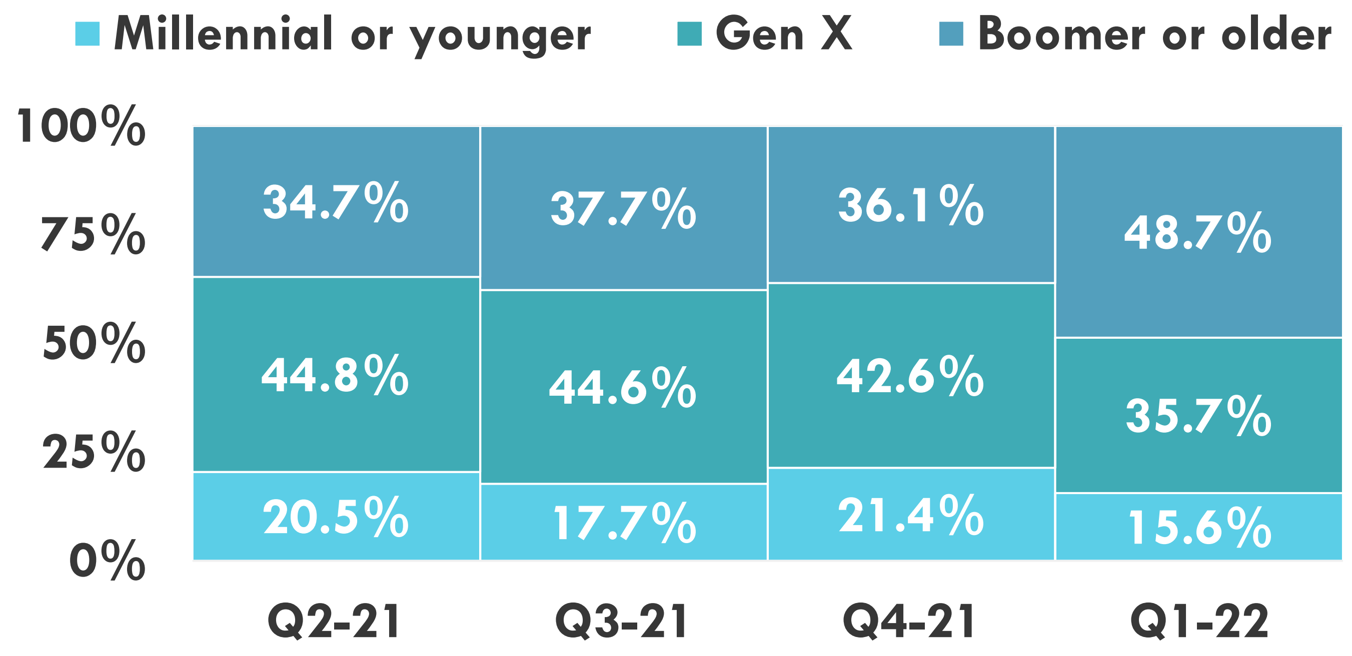
Average Days & Nights



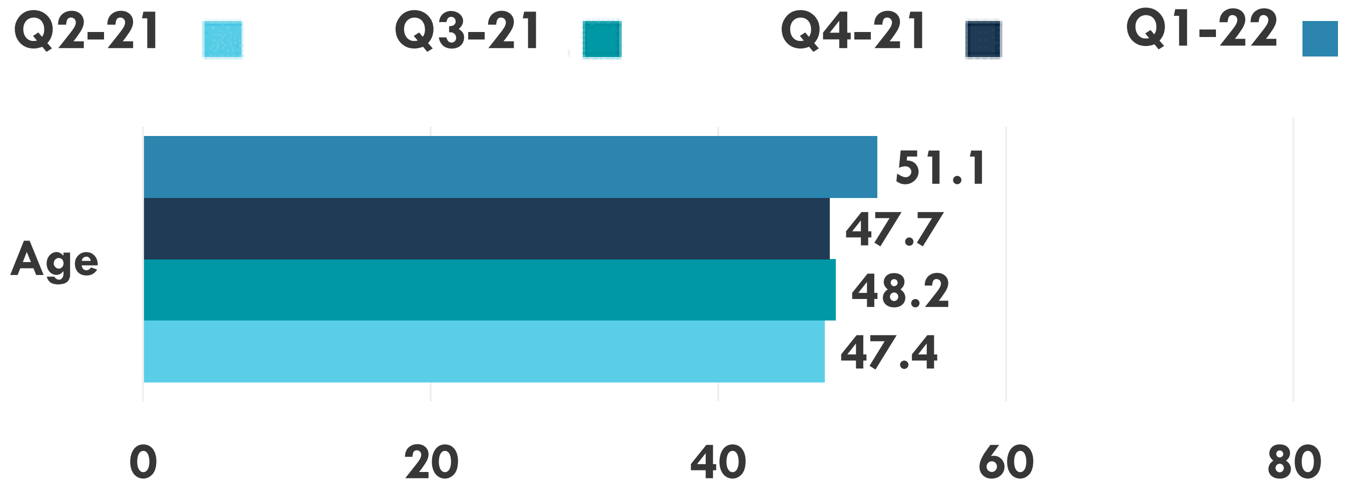
Percent Staying Overnight



Generations



Average Age



Average Income

$104,401
Q1-22

Q2-21	$108,907
Q3-21	$105,882
Q4-21	$105,097

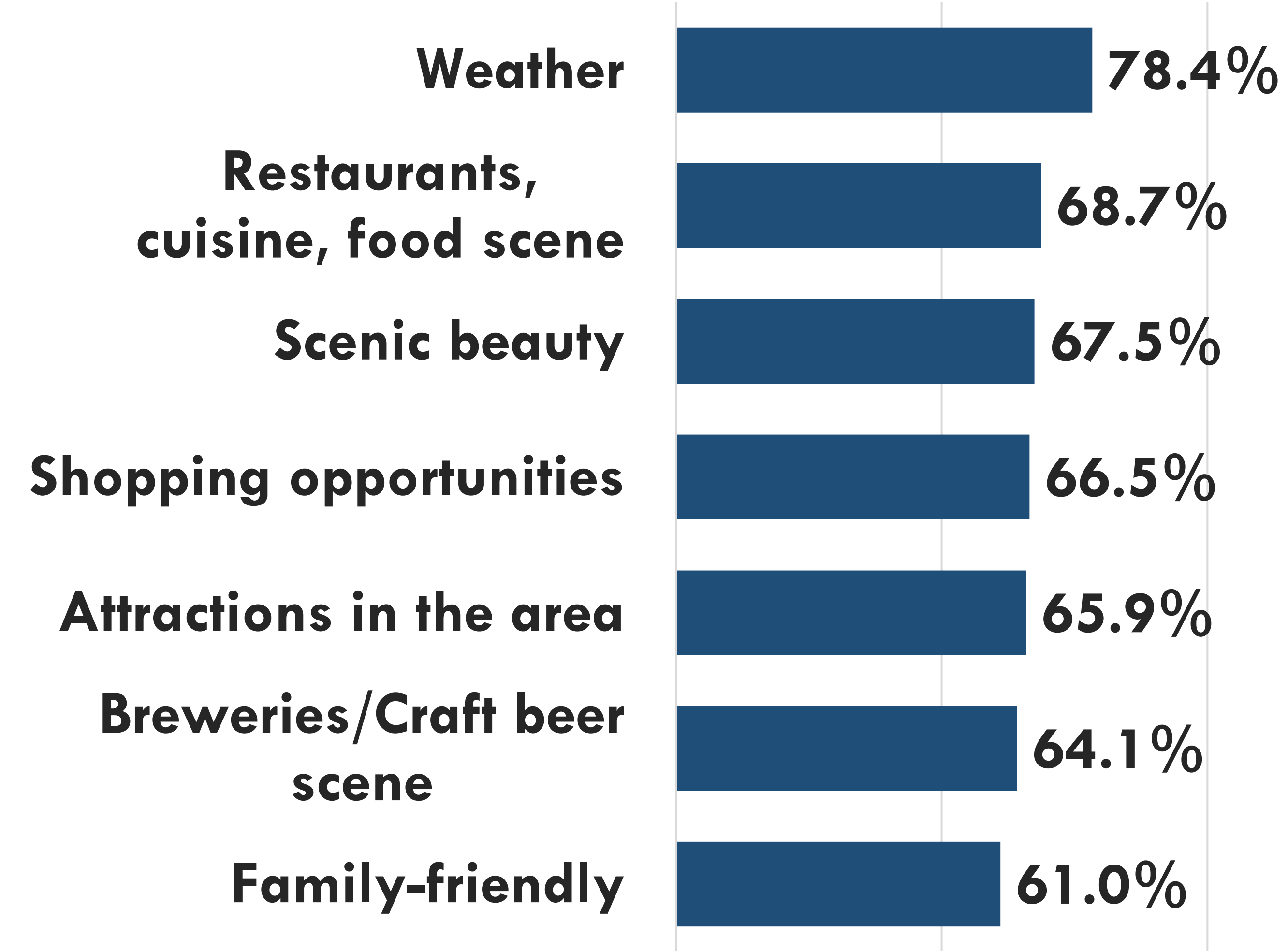
Q1 2022
Visitor Summaries by Traveler Segment

THE BEACH GO-ER

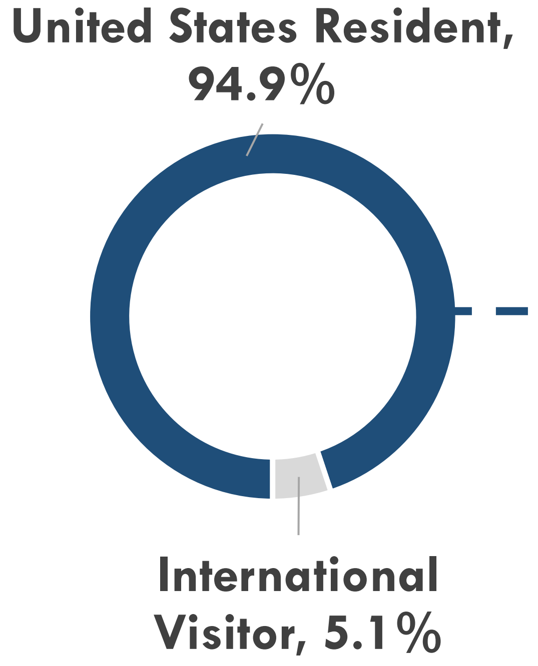
Q1 2022

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	27.4%
California	9.4%
New York	7.8%

Top Communities Visited

St. Petersburg	68.0%
Pinellas Park	62.2%
Madeira Beach	61.1%
Clearwater Beach	40.9%
Treasure Island	36.2%

Top Activities

93.5%	86.1%	64.0%	59.1%
Dining in restaurants	Shopping	Visit breweries	Bars/Nightlife

Length of Stay

3.6 Days on Average

Travel Party Size

2.3 People

23.2% Traveled with Children

Daily Spending

$126.49

Per Person

Destination Analysts
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THE ARTS & CULTURE VISITOR

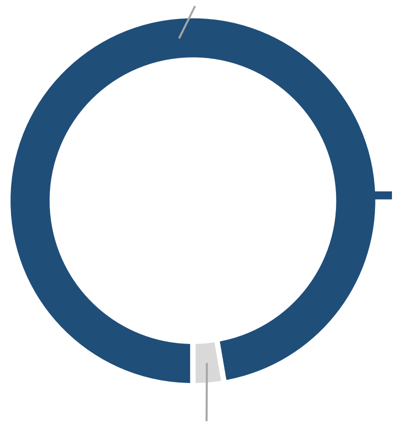
Q1 2022

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

Attractions in the area	94.0%
Weather	90.3%
Restaurants, cuisine, food scene	88.9%
Scenic beauty	88.6%
Breweries/Craft beer scene	87.6%
Family-friendly	86.8%

Domestic vs. International



POINT OF ORIGIN: TOP STATES

Florida	37.6%
California	8.3%
Texas	7.3%

Top Communities Visited

St. Petersburg	99.4%
Pinellas Park	85.5%
Madeira Beach	47.6%
Seminole	46.8%
Clearwater	37.1%

Top Activities

98.6%	89.7%	86.0%	75.6%
Dining in restaurants	Shopping	Visit breweries	Bird watching

Length of Stay

3.3 Days on Average

Travel Party Size

2.1 People

18.6% Traveled with Children

Daily Spending

$132.74

Per Person

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THE AFFLUENT VISITOR

Q1 2022

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

Factors Important to Destination Decision

Weather	47.7%
Beaches that suit my tastes	44.5%
Friends or family in the area	26.6%
Overall ambiance & atmosphere	25.2%
Scenic beauty	22.2%
Easy to get to	20.6%

Domestic vs. International

United States Resident, 96.2%

International Visitor, 3.8%

POINT OF ORIGIN: TOP STATES

Florida	18.2%
Michigan	13.9%
New York	13.1%

Top Communities Visited

Madeira Beach	55.5%
Clearwater Beach	40.6%
St. Pete Beach	36.6%
Treasure Island	35.1%
Clearwater	26.2%

Top Activities

85.3%	81.8%	36.7%	29.0%
Visit the beach	Dining in restaurants	Shopping	Swimming

Length of Stay

4.5 Days on Average

Travel Party Size

2.4 People

26.3% Traveled with Children

Daily Spending

$119.33

Per Person

Destination Analysts
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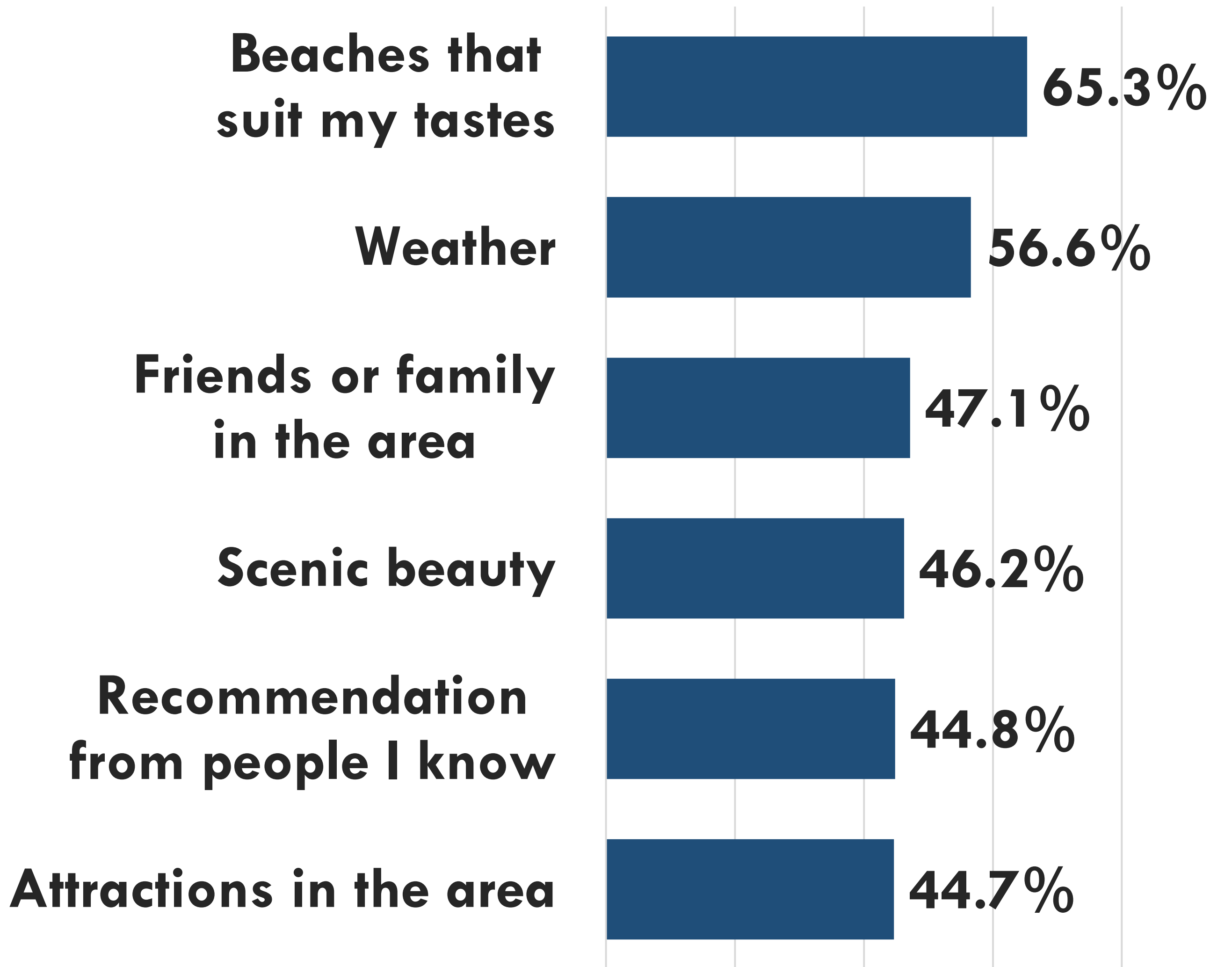
THE FAMILY TRAVELER

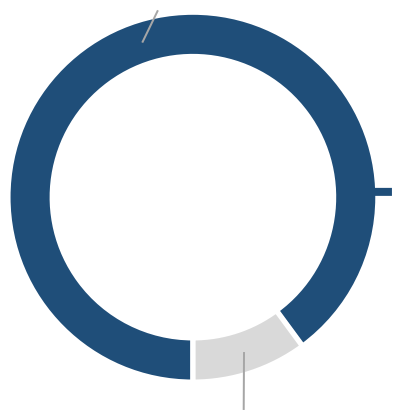
Q1 2022

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	23.8%
Texas	7.6%
New York	6.1%

Top Communities Visited

Clearwater Beach	52.7%
St. Petersburg	50.2%
Madeira Beach	42.0%
Pinellas Park	39.2%
Clearwater	30.7%

Top Activities

88.8%	82.4%	71.1%	44.5%
Visit the beach	Dining in restaurants	Shopping	Visit friends or family'

Length of Stay

3.6 Days on Average

Travel Party Size

4.0 People

100% Traveled with Children

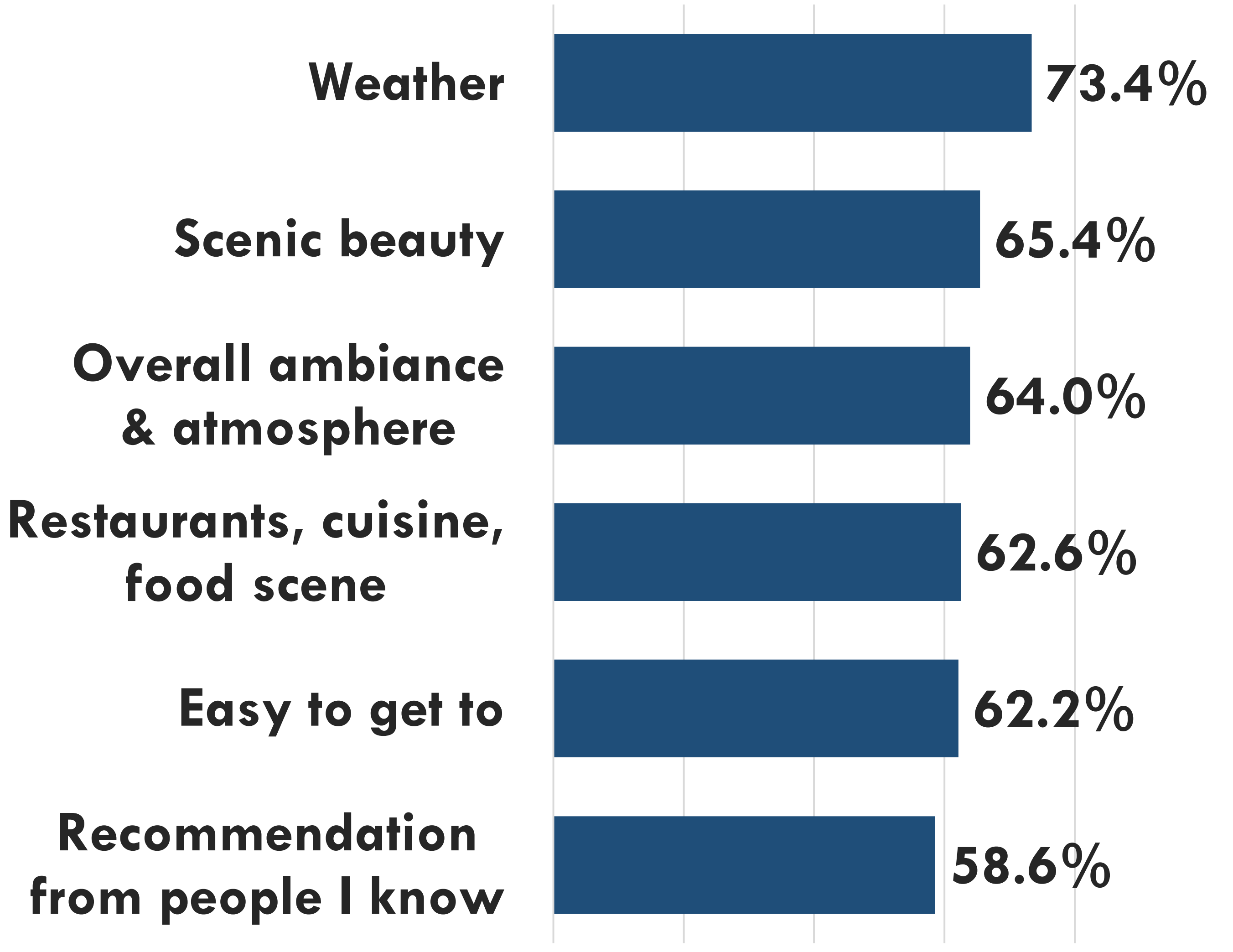
Daily Spending

$82.13

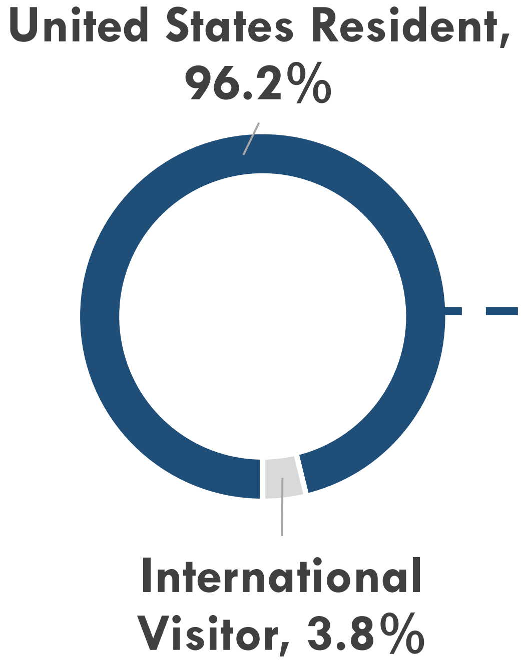
Per Person

Q1 2022 Visitor Summaries by Generation

Factors Important to Destination Decision



Domestic vs. International



POINT OF ORIGIN: TOP STATES

Florida	52.7%
California	7.2%
Ohio	3.1%

Top Communities Visited

St. Petersburg	76.4%
Madeira Beach	53.1%
Pinellas Park	51.8%
Treasure Island	32.8%
Clearwater Beach	30.3%

Top Activities

92.9%	79.4%	71.8%	56.3%
Dining in restaurants	Visit the beach	Shopping	Visit friends or family

Length of Stay

2.9 Days on Average

Travel Party Size

2.2 People

15.0% Traveled with Children

Daily Spending

$110.28 Per Person

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THE GEN X VISITOR

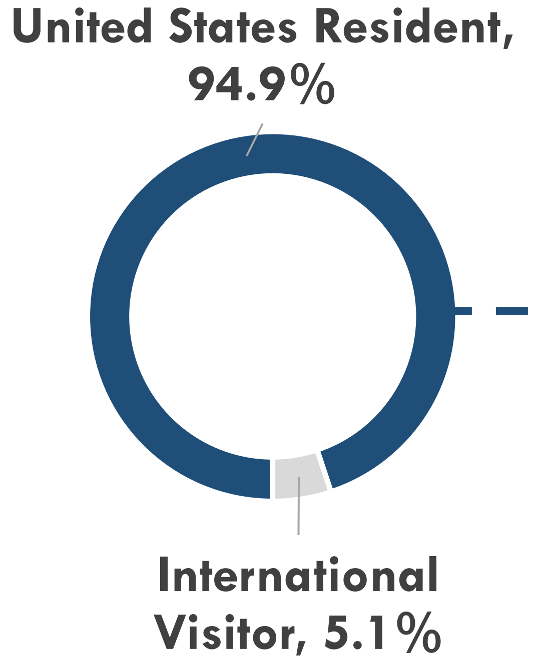
Q1 2022

Results presented here are reflective of visitors between the age of 41-57.

Factors Important to Destination Decision

Weather	56.2%
Beaches that suit my tastes	51.7%
Friends or family in the area	47.3%
Scenic beauty	43.1%
Overall ambiance & atmosphere	41.2%
Attractions in the area	40.5%

Domestic vs. International



POINT OF ORIGIN: TOP STATES

Florida	28.7%
New York	9.1%
Texas	4.8%

Top Communities Visited

Clearwater Beach	50.1%
St. Petersburg	49.6%
Madeira Beach	43.5%
Pinellas Park	33.8%
Treasure Island	28.1%

Top Activities

88.4%	85.8%	68.8%	43.2%
Dining in restaurants	Visit the beach	Shopping	Visit friends or family

Length of Stay

3.7 Days on Average

Travel Party Size

2.5 People

33.9% Traveled with Children

Daily Spending

$110.54

Per Person

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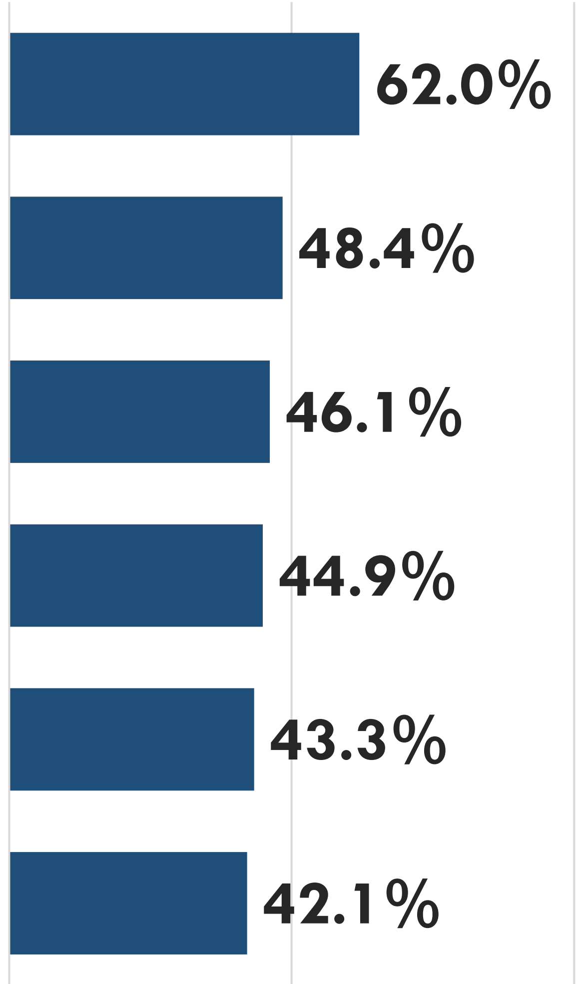
THE BABY BOOMER VISITOR

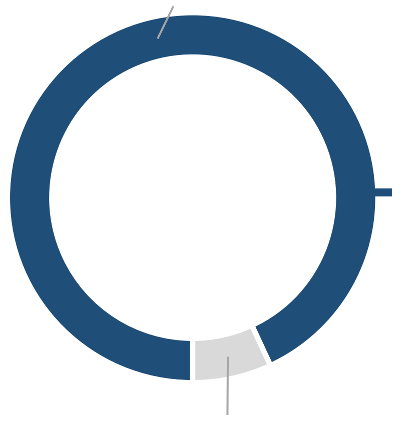
Q1 2022

Results presented here are reflective of visitors between the age of 58-76.

Factors Important to Destination Decision



Domestic vs. International



POINT OF ORIGIN: TOP STATES

Florida	28.2%
New York	9.3%
Michigan	6.0%

Top Communities Visited

St. Petersburg	56.9%
Madeira Beach	41.9%
Pinellas Park	37.3%
Clearwater Beach	35.5%
Clearwater	21.9%

Top Activities

90.4%	72.6%	72.5%	49.6%
Dining in restaurants	Shopping	Visit the beach	Visit friends or family

Length of Stay

3.4 Days on Average

Travel Party Size

2.0 People

6.7% Traveled with Children

Daily Spending

127.05

Per Person

Destination Analysts
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Planning the St. Pete/Clearwater Trip

WHEN DECISION TO VISIT WAS MADE

In Q1 2022, visitors surveyed decided to visit St. Pete/Clearwater approximately 5.6 weeks (39.3 days) prior to their actual arrival date – down from 8.6 weeks (60.1 days) in Q1 2021. Hotel guests made the decision to visit an average of 1.9 months in advance (57.2 days) – slightly down from 2.1 months (63.4 days) in Q1 2021, while VFRs decided approximately 1.3 months in advance (39.7 days) – down from 2.6 months (77.3 days) in Q1 2021, and day trippers decided approximately 2.7 weeks in advance (18.9 days) – down from 5.9 weeks (41.7 days) in Q1 2021.

Figure 1: Average Time Between Decision to Visit and Arrival

39.3 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. 1,223 responses.

Detail by Type of Visitor

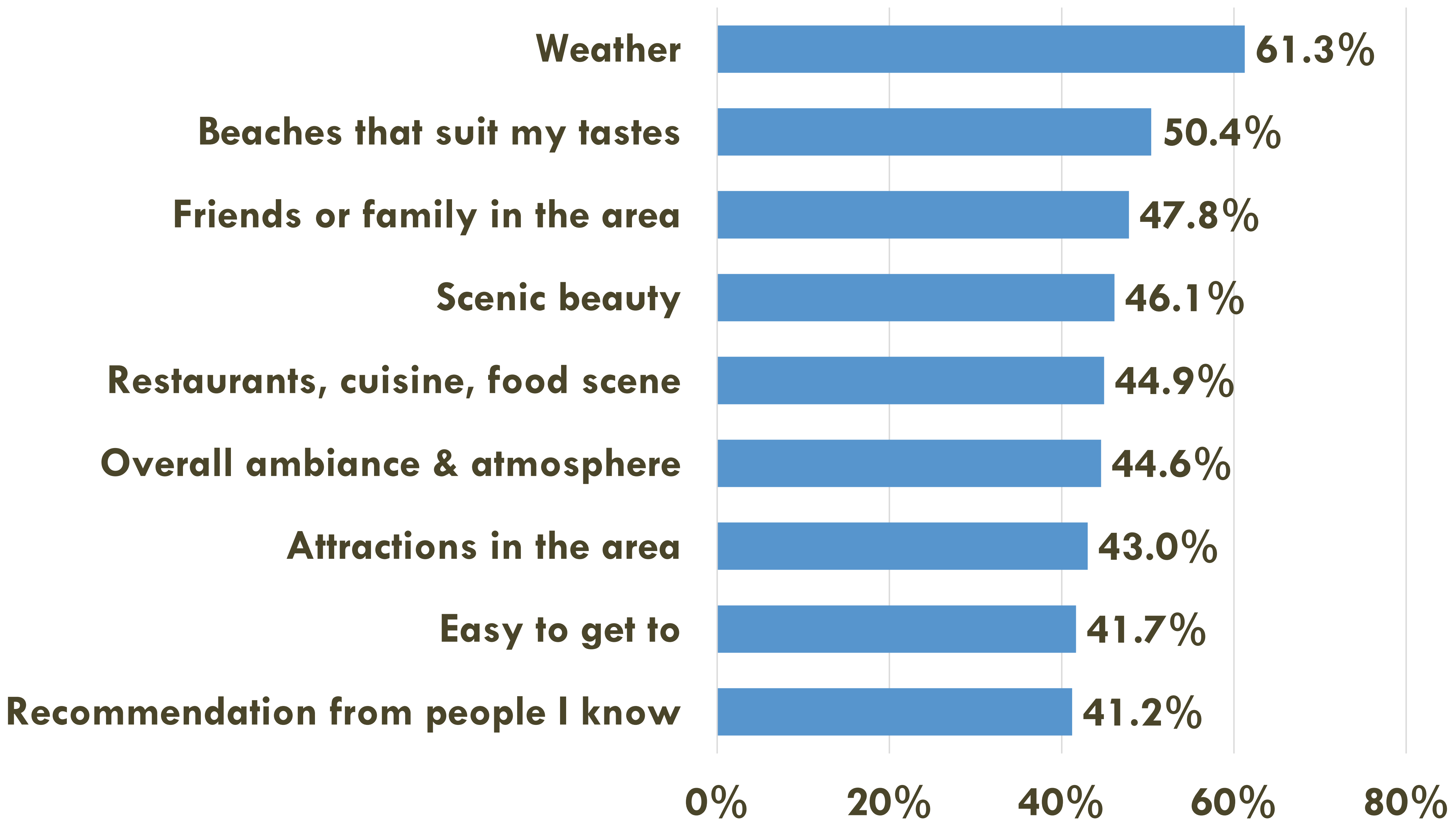
	Hotel	VFR	Day Trip
Average Days	57.2	39.7	18.9
Sample Size:	**297**	**300**	**392**

IMPORTANT FACTORS TO DESTINATION DECISION

The top three most important factors driving visitation to St. Pete/Clearwater in Q1 2022 were weather (61.3%), beaches (50.4%) and friends/family in the area (47.8%). In addition, scenic beauty (46.1%), restaurants and the food scene (44.9%), overall ambiance & atmosphere (44.6%), attractions in the area (43.0%), being easily accessible (41.7%) and recommendations (41.2%) were factors that motivated visitors to come to St. Pete/Clearwater.

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. 1,273 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Weather	63.4%	77.3%	52.3%
Beaches that suit my tastes	53.5%	57.8%	49.4%
Friends or family in the area	27.4%	81.6%	50.0%
Scenic beauty	46.8%	62.1%	43.1%
Restaurants, cuisine, food scene	41.6%	60.2%	44.2%
Overall ambiance & atmosphere	52.5%	55.8%	37.4%
Attractions in the area	38.0%	56.5%	46.4%
Easy to get to	44.7%	59.7%	35.3%
Recommendation from people I know	44.1%	58.6%	36.9%
Sample Size:	**278**	**321**	**405**

IMPORTANT FACTORS TO DESTINATION DECISION – FULL DETAIL

	Total	Hotel	VFR	Day Trip
Weather	61.3%	**63.4%**	**77.3%**	**52.3%**
Beaches that suit my tastes	50.4%	**53.5%**	**57.8%**	49.4%
Friends or family in the area	47.8%	27.4%	81.6%	50.0%
Scenic beauty	46.1%	46.8%	**62.1%**	43.1%
Restaurants, cuisine, food scene	44.9%	41.6%	**60.2%**	44.2%
Overall ambiance & atmosphere	44.6%	52.5%	55.8%	37.4%
Attractions in the area	43.0%	38.0%	**56.5%**	46.4%
Easy to get to	41.7%	44.7%	**59.7%**	35.3%
Recommendation from people I know	41.2%	44.1%	58.6%	36.9%
Shopping opportunities	40.2%	36.5%	56.6%	41.0%
Breweries/Distilleries/Craft beer scene	38.5%	35.1%	54.7%	39.8%
The St. Pete/Clearwater area is family-friendly	37.0%	34.3%	54.8%	37.5%
The area's unique culture	34.8%	33.1%	50.1%	35.8%
Advertisements for the area	32.7%	36.8%	51.2%	30.5%
Arts & cultural offerings	30.7%	31.2%	47.1%	29.8%
The St. Pete/Clearwater area is romantic	29.2%	35.0%	41.6%	27.8%
St. Pete Pier	29.0%	33.4%	51.5%	24.8%
Articles, features, reviews, etc. about the area	19.9%	29.7%	30.1%	16.7%
Outdoor recreational opportunities	19.2%	30.4%	30.8%	14.0%
Fishing opportunities	8.2%	12.3%	12.0%	6.1%
Appealing hotels/resorts and other lodging options	6.8%	33.3%	0.2%	0.7%
Good hotel rate	4.4%	25.5%	0.6%	0.0%
Special event(s) and/or festival(s)	4.2%	4.7%	4.0%	4.5%
A specific attraction:	2.2%	2.6%	0.9%	2.4%
Lifelong desire to visit	1.6%	5.3%	1.7%	0.7%
Good deal on airfare	1.4%	5.2%	0.0%	0.6%
Sports or sporting events	1.0%	2.6%	0.2%	0.6%
Golf	0.5%	0.9%	0.5%	0.4%
Base	**1,273**	**278**	**321**	**405**

Differences seen amongst visitor types:

- Across these visitor segments, weather was the most important factor in deciding to visit the St. Pete/Clearwater area.
- Hotel guests and VFRs were the likeliest segments to say that St. Pete/Clearwater's beaches were important to their decision to visit the destination.

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. 1,273 responses.

TRAVEL PLANNING RESOURCES USED

In Q1 of 2022, opinions of friends or relatives (51.6% -- up from 29.5% in Q1 2021), user-generated content (44.9% -- down from 61.9% in Q1 2021), online travel agencies (31.4%), social media content (29.9% -- up from 21.3% in Q1 2020) were the most utilized travel planning resources. Usage of the official Visit St. Pete/Clearwater website saw a slight increase before arrival, from 18.6 percent in Q1 2021 to 19.3 percent in Q1 2022. In-market usage also increased slightly from 0.5 percent in Q1 2021 to 0.7 percent in Q1 2022. Hotel guests were the likeliest segment to use www.VisitStPeteCleawater as a travel planning resource prior to arrival (34.6% vs. 27.7% of VFRs and 7.8% of day trippers).

Figure 3: Resources Used before Arrival and While In Market

	Used Before Arrival	Used In-Market
Opinions of friends or relatives	51.6%	13.5%
User-generated content/Review websites, such as Yelp and TripAdvisor	44.9%	19.1%
Online travel agencies	31.4%	0.6%
Social Media content	29.9%	18.2%
www.VisitStPeteClearwater.com	**19.3%**	**0.7%**
Travel guides, brochures	11.6%	27.7%
YouTube or other online videos	6.1%	0.3%
Lifestyle or travel magazines	1.2%	4.5%
Travel agency (traditional, offline)	0.8%	0.0%
Television programming	0.7%	0.4%
Radio programming	0.5%	0.3%
Newspaper travel section	0.5%	4.7%
Gulf to Bay St Pete/Clearwater Destination Magazine	**0.4%**	**0.4%**

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. 1,325 responses.

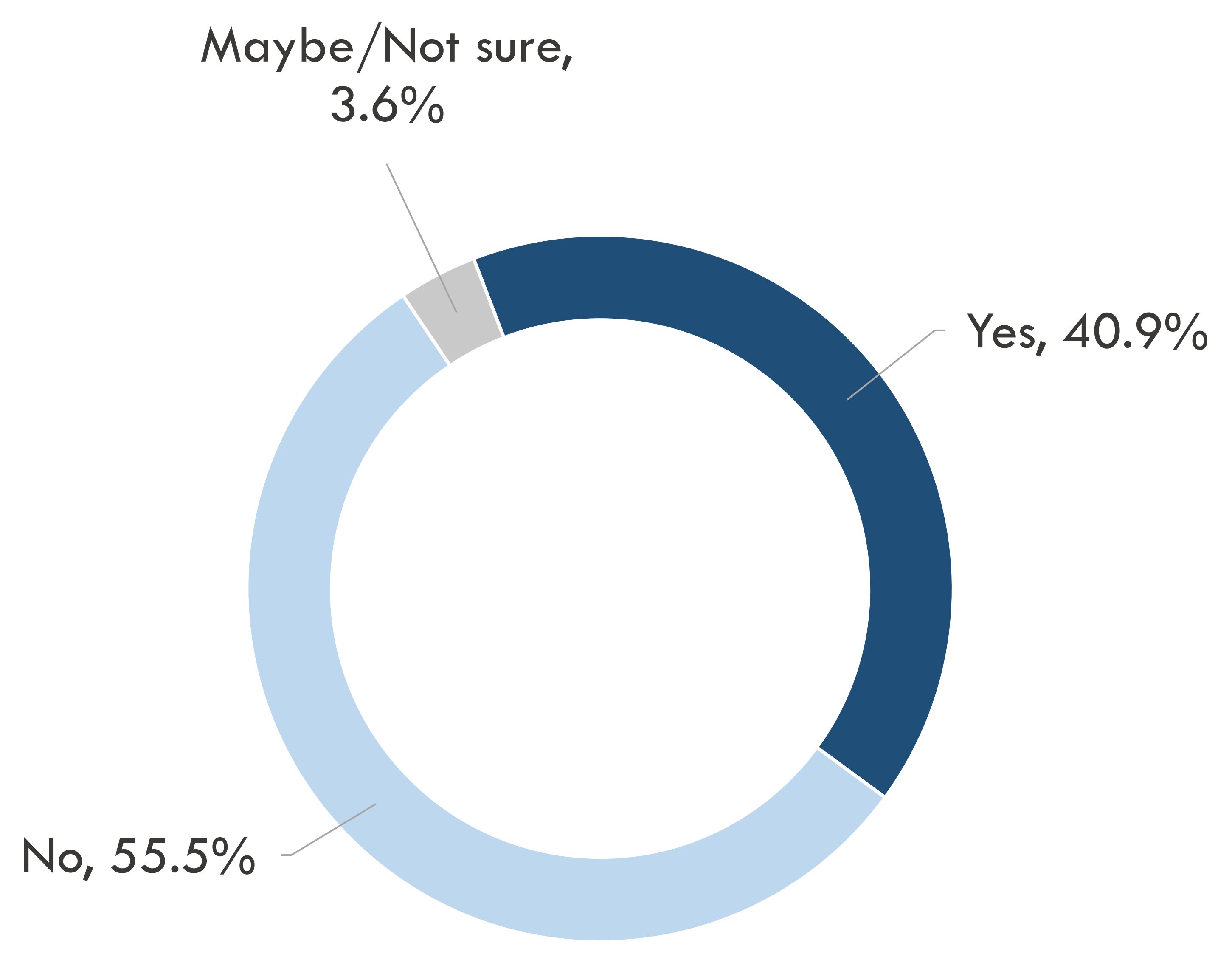
Detail by Traveler Segment

	Hotel		VFR		Day Trip	
	Pre-Arrival	**In-Market**	**Pre-Arrival**	**In-Market**	**Pre-Arrival**	**In-Market**
Opinions of friends or relatives	31.7%	13.7%	73.4%	12.1%	55.1%	15.2%
User-generated content/Review websites, such as Yelp and TripAdvisor	64.1%	31.2%	44.8%	19.5%	36.7%	10.4%
Online travel agencies	47.5%	1.2%	20.7%	1.1%	27.7%	0.0%
Social Media content	44.8%	22.8%	43.0%	22.6%	17.0%	10.0%
www.VisitStPeteClearwater.com	**34.6%**	**0.5%**	**27.7%**	**1.0%**	**7.8%**	**0.3%**
Travel guides, brochures	13.0%	39.3%	5.7%	45.9%	12.5%	19.9%
YouTube or other online videos	12.2%	0.0%	8.9%	0.3%	4.0%	0.2%
Lifestyle or travel magazines	0.7%	8.1%	1.4%	12.2%	1.3%	1.8%
Travel agency (traditional, offline)	1.2%	0.0%	0.8%	0.0%	0.7%	0.0%
Television programming	0.3%	1.7%	0.0%	0.1%	0.5%	0.0%
Radio programming	0.5%	0.3%	0.0%	0.5%	0.3%	0.2%
Newspaper travel section	0.3%	9.8%	1.2%	8.9%	0.3%	2.5%
Gulf to Bay St Pete/Clearwater Destination Magazine	**1.2%**	**1.7%**	**0.4%**	**0.2%**	**0.0%**	**0.0%**
Sample Size:	**318**		**327**		**409**	

EARNED & PAID MEDIA RECALL

Four-in-ten visitors surveyed in Q1 2022 recalled seeing, hearing or reading earned media or advertisements/promotions for St. Pete/Clearwater in the past six months (40.9% -- up from 33.4% in Q1 2021 and 31.7% in Q4 2021). 46.6 percent of hotel guests recalled paid media (up from 29.7% in Q1 2021 and 31.6% in Q4 2021) while similar proportions of day trippers (44.8%) said they recalled seeing, reading or hearing about St. Pete/Clearwater (an increase from 37.1% in Q1 2021 and 30.9% in Q4 2021).

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 1,298 responses.

Detail by Traveler Segment

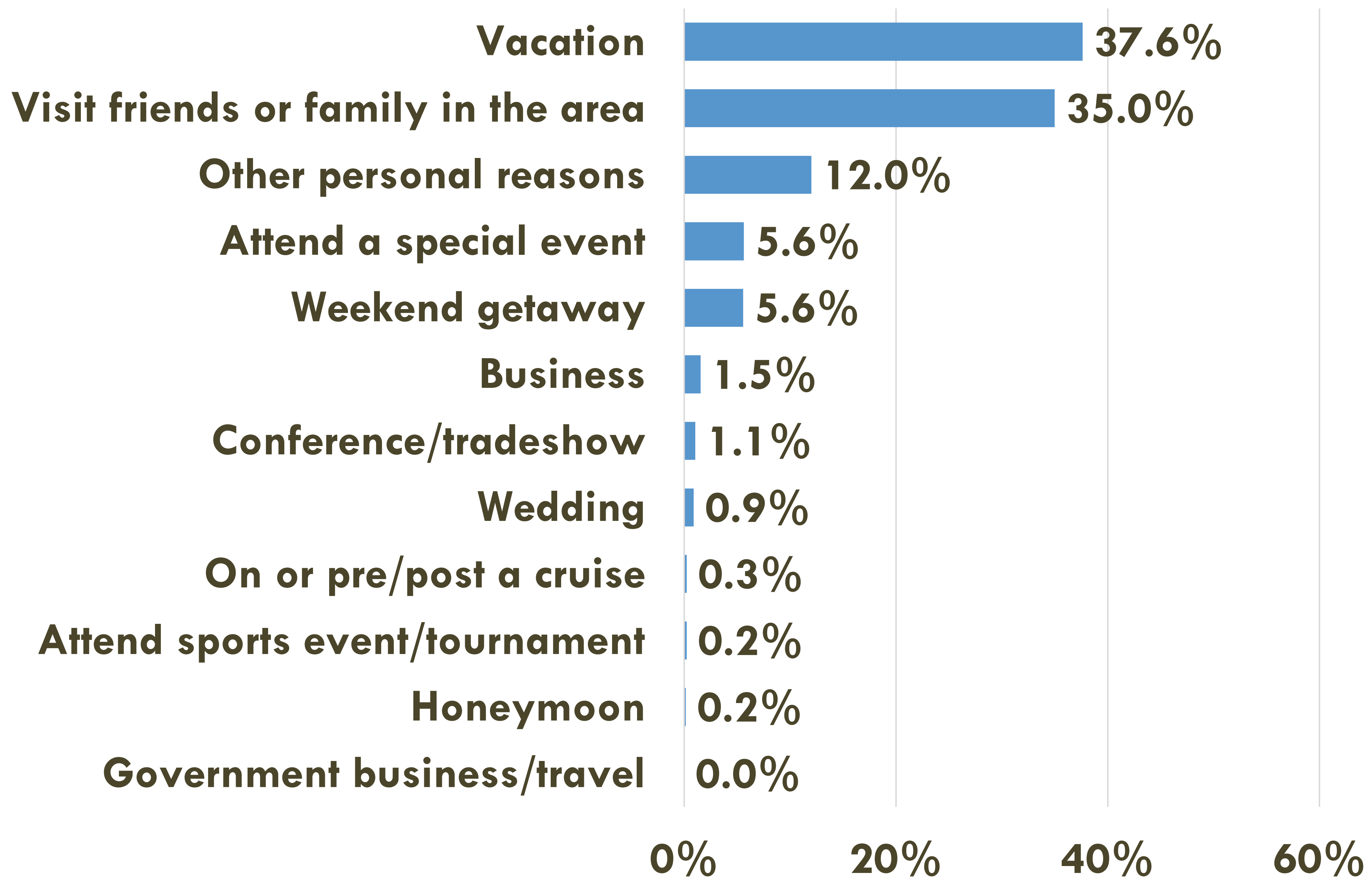
	Hotel	VFR	Day Trip
Yes	**46.6%**	**28.9%**	**44.8%**
No	51.6%	67.7%	51.0%
Maybe/Not sure	1.8%	3.4%	4.2%
Sample Size:	**312**	**321**	**400**

Visitor Trip Details

PRIMARY REASON FOR VISIT

In the first quarter of 2022, while vacation was the primary reason for a visit to St. Pete/Clearwater (37.6% -- down from 55.5% in Q1 2021), the desire to visit friends or family increased drastically to 35.0 percent compared to 16.0 percent in Q1 2021. Hotel guests continued to be the likeliest segment to characterize their St. Pete/Clearwater trip as a vacation (65.9%) and day trippers were again the likeliest to be in the area for other personal reasons (19.6%) or to attend a special event (10.0%).

Figure 5: Primary Reason for Visit



Question: What is your primary reason for visiting the St. Pete/Clearwater Area? (Select one)
Base: All Respondents. 1,311 responses.

Detail by Traveler Segment

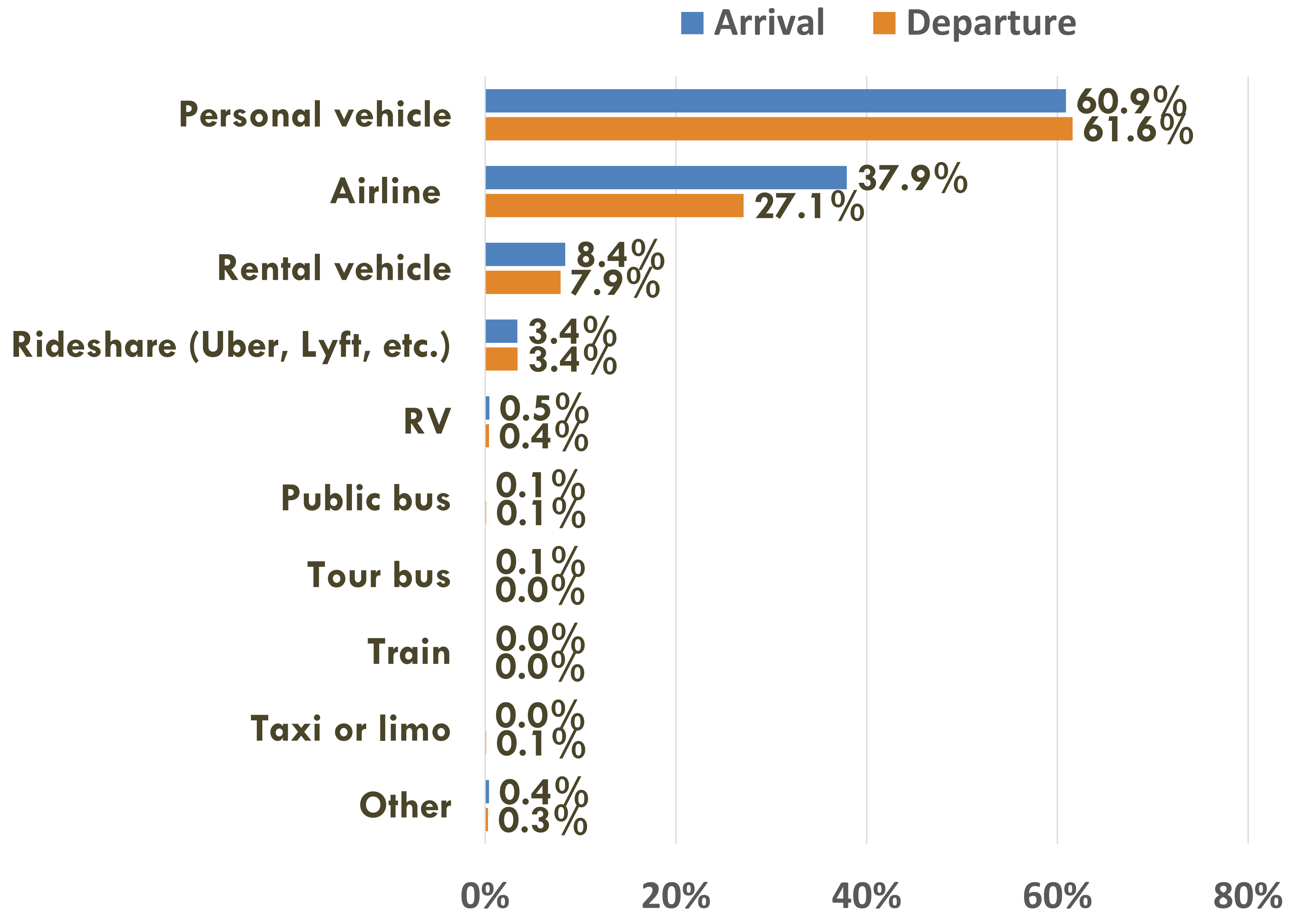
	Hotel	VFR	Day Trip
Vacation	**65.9%**	24.2%	23.9%
Visit friends or family in the area	6.7%	69.3%	39.8%
Other personal reasons	0.3%	3.6%	**19.6%**
Attend a special event	0.5%	0.0%	**10.0%**
Weekend getaway	8.6%	1.9%	5.6%
Business	8.4%	0.4%	0.1%
Conference/tradeshow or other group meeting	3.6%	0.0%	0.8%
Wedding	3.9%	0.1%	0.0%
On or pre/post a cruise	0.0%	0.5%	0.3%
Attend sports event/tournament	1.2%	0.0%	0.0%
Honeymoon	1.0%	0.0%	0.0%
Government business/travel	0.0%	0.0%	0.0%
Sample Size:	**317**	**326**	**397**

METHOD OF ARRIVAL & DEPARTURE

The top methods of arrival in Q1 2022 were again personal vehicle (60.9%) and airline (37.9%), nearly identical to Q1 2021 (59.3% and 39.1%, respectively).

Day trippers and VFRs were the likeliest segments to arrive by personal vehicle (69.6% and 63.5%, respectively), and hotel guests the likeliest to arrive by airline (61.7% -- an increase from 54.7% in Q1 2021). In general, the methods of departure are the same as the methods of arrival.

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. 1,325 responses.

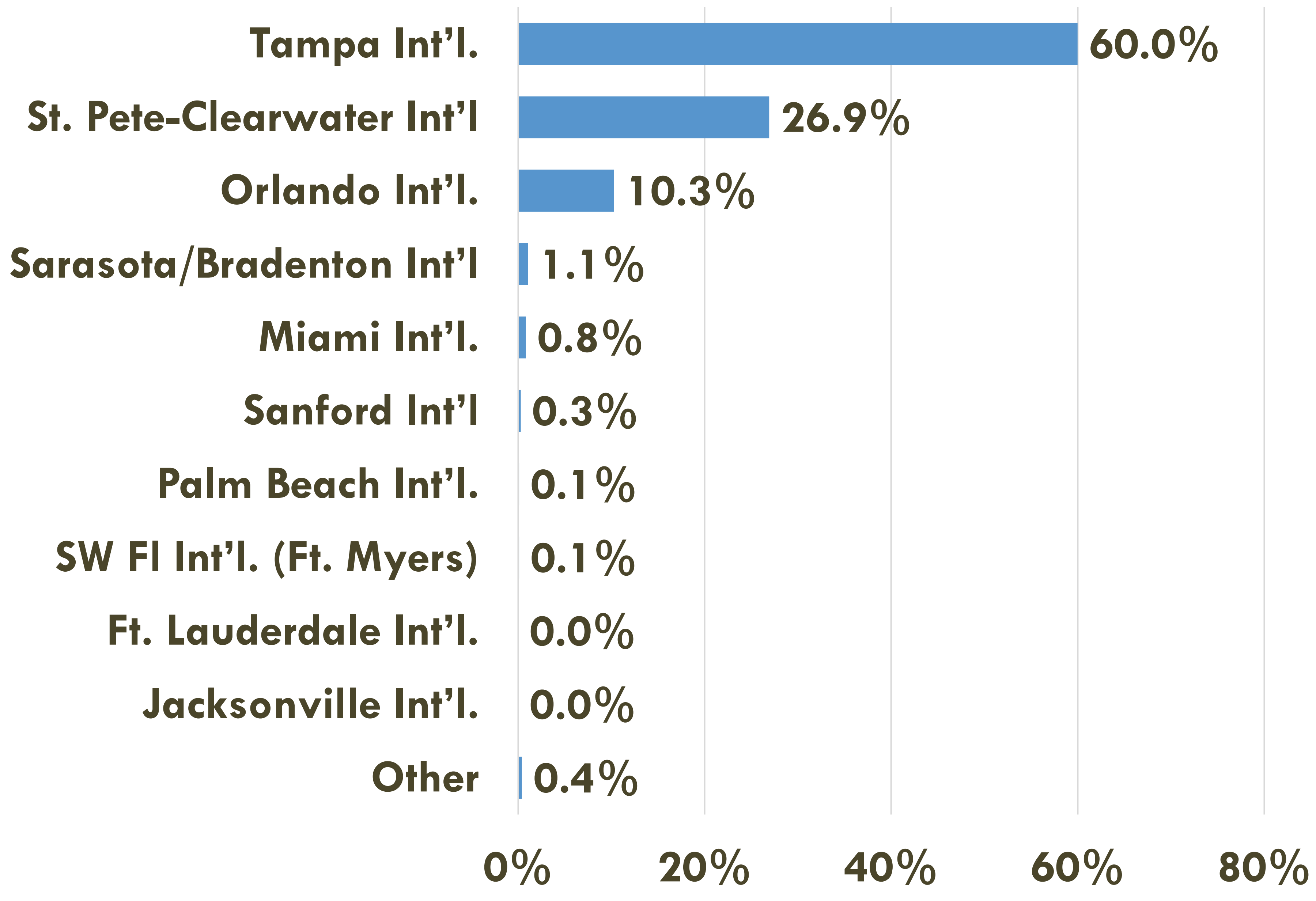
Detail by Traveler Segment

	Hotel		VFR		Day Trip	
	Arrival	**Departure**	**Arrival**	**Departure**	**Arrival**	**Departure**
Personal vehicle	36.1%	36.8%	**63.5%**	63.6%	**69.6%**	70.7%
Airline	**61.7%**	41.6%	37.4%	34.1%	29.2%	17.8%
Rental vehicle	9.7%	9.7%	1.8%	1.8%	10.6%	9.7%
Rideshare (Uber, Lyft, etc.)	9.7%	10.2%	0.6%	0.6%	2.4%	2.3%
RV	0.5%	0.5%	0.0%	0.0%	0.4%	0.4%
Public bus	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
Tour bus	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%
Train	0.3%	0.3%	0.0%	0.0%	0.0%	0.0%
Taxi or limo	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%
Other	1.2%	1.4%	0.6%	0.0%	0.2%	0.2%
Sample Size:	**318**		**327**		**409**	

ARRIVAL AIRPORT

Across all segments, air travelers mostly arrived in the destination through Tampa Int'l. (60.0% -- up from 54.5% in Q1 2021). 26.9 percent of visitors arriving by airplane flew into St. Pete-Clearwater International (a decrease from 32.2% in Q1 2021, but an increase from 19.2% in Q4 2021). Additionally, 10.3 percent of air visitors flew into Orlando International and 1.1 percent chose Sarasota/Bradenton as their arrival airport. Compared to Q1 2021, hotel guests were likelier to fly into St. Pete-Clearwater Int'l. in Q1 2022 (29.7% vs. 21.8% in Q1 2021), however, day trippers were likelier to have chosen to fly into Tampa Int'l. (26.7% vs. 42.0% in Q1 2021).

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. 529 responses.

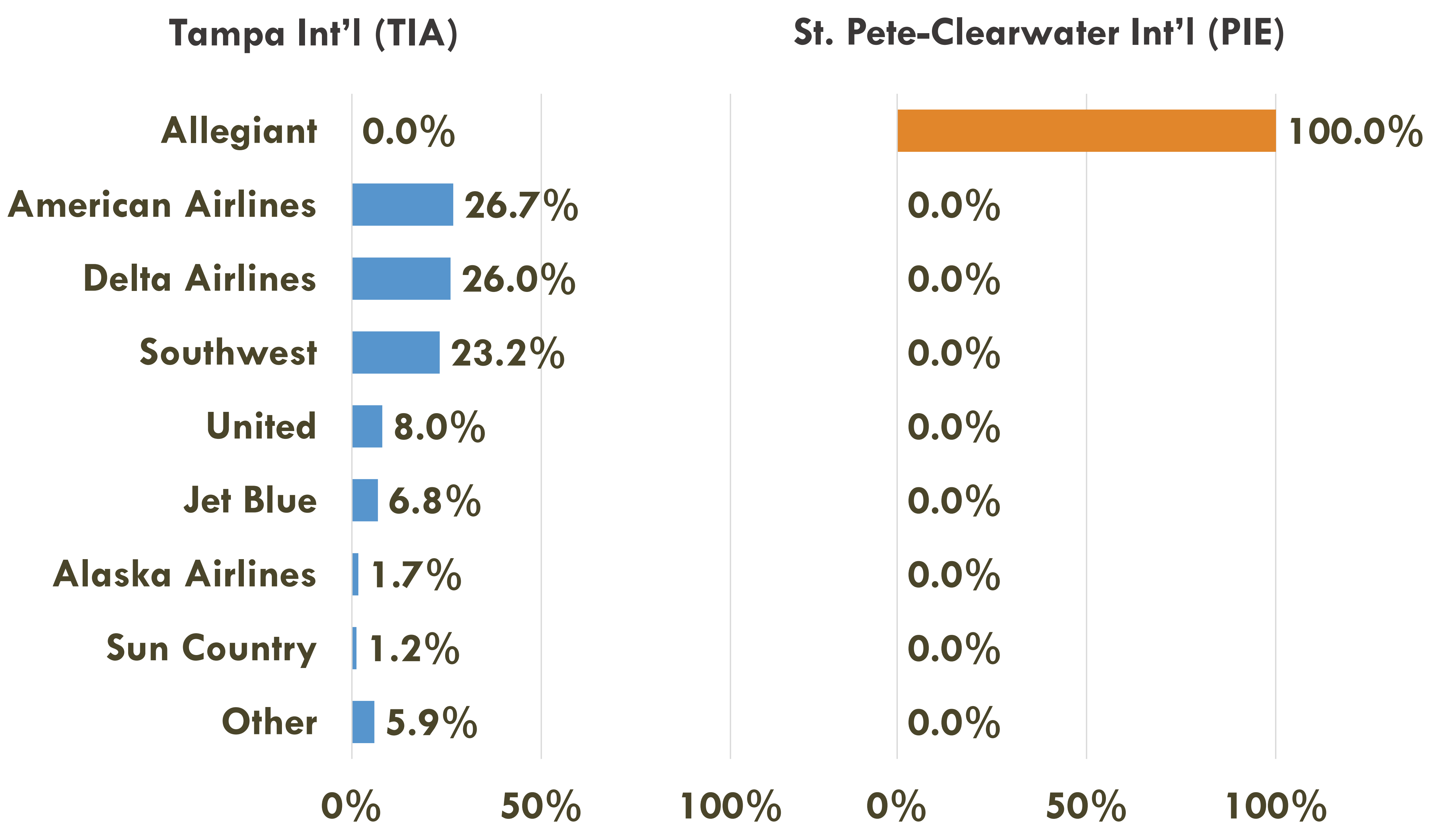
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Tampa Int'l.	62.2%	68.9%	49.8%
St. Pete-Clearwater Int'l	29.7%	27.9%	26.7%
Orlando Int'l.	6.1%	2.4%	18.8%
Sarasota/Bradenton Int'l	0.0%	0.2%	2.2%
Miami Int'l.	1.6%	0.0%	1.0%
Sanford Int'l	0.0%	0.2%	0.5%
Palm Beach Int'l.	0.4%	0.0%	0.0%
SW Fl Int'l. (Ft. Myers)	0.0%	0.2%	0.0%
Ft. Lauderdale Int'l.	0.0%	0.0%	0.0%
Jacksonville Int'l.	0.0%	0.0%	0.0%
Other	0.0%	0.0%	1.0%
Sample Size:	**198**	**133**	**76**

ARRIVAL AIRLINE BY AIRPORT

Visitors who flew into St. Pete-Clearwater International in Q1 2022. arrived via Allegiant Air. Visitors arriving in the destination via Tampa International most commonly flew American Airlines (26.7%), Delta Airlines (26.0%) and Southwest Airlines (23.2%). American Airlines was the airline of choice for many hotel guests (26.9%) and day visitors (33.7%) while VFRs were most likely to select Southwest Airlines (34.2%).

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. 484 responses.

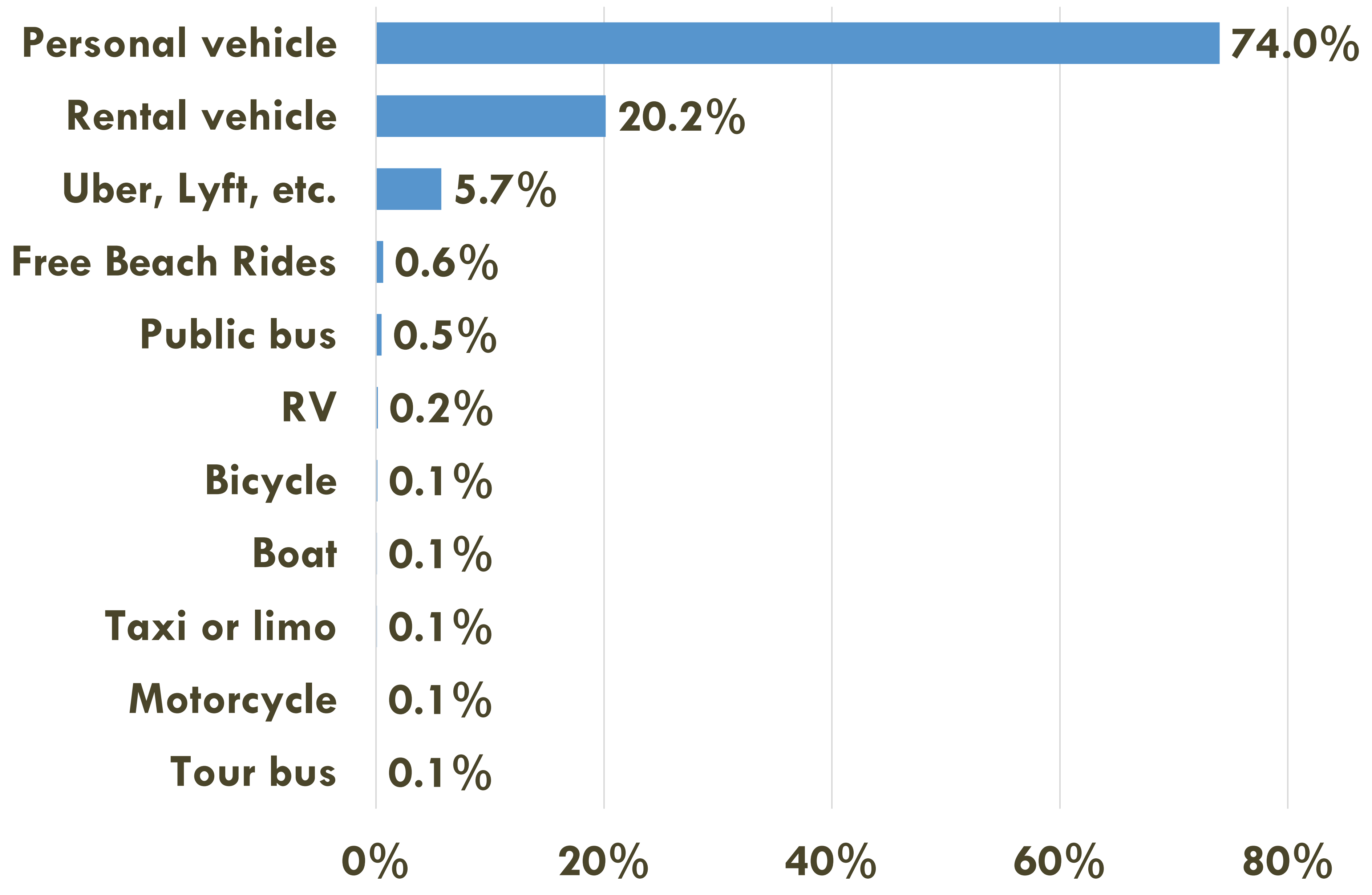
Detail by Traveler Segment

	Hotel		VFR		Day Trip	
	TIA	PIE	TIA	PIE	TIA	PIE
Allegiant	0.0%	**100.0%**	0.0%	**100.0%**	0.0%	**100.0%**
American Airlines	**26.9%**	0.0%	18.7%	0.0%	**33.7%**	0.0%
Delta Airlines	26.2%	0.0%	26.2%	0.0%	30.7%	0.0%
Southwest	23.4%	0.0%	**34.2%**	0.0%	8.0%	0.0%
United	7.7%	0.0%	10.3%	0.0%	8.8%	0.0%
Jet Blue	8.8%	0.0%	4.9%	0.0%	6.9%	0.0%
Alaska Airlines	1.2%	0.0%	0.0%	0.0%	3.0%	0.0%
Sun Country	0.7%	0.0%	0.0%	0.0%	2.0%	0.0%
Other	3.8%	0.0%	5.3%	0.0%	6.9%	0.0%
Sample Size:	184		127		55	

TRANSPORTATION USED IN-MARKET

Personal and rental vehicles were again the most utilized forms of transportation within the destination in Q1 2022. 74.0 percent of visitors used their personal vehicle as transportation (slightly up from 71.9% in Q1 2021) and 20.2 percent used a rental vehicle (slightly down from 22.2% in Q1 2021). VFRs and day trippers were most inclined to use their personal vehicle (89.4% and 83.7% respectively). In line with Q1 2021, hotel guests were the likeliest segment to take advantage of Free Beach Rides (3.1%).

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. 1,318 responses.

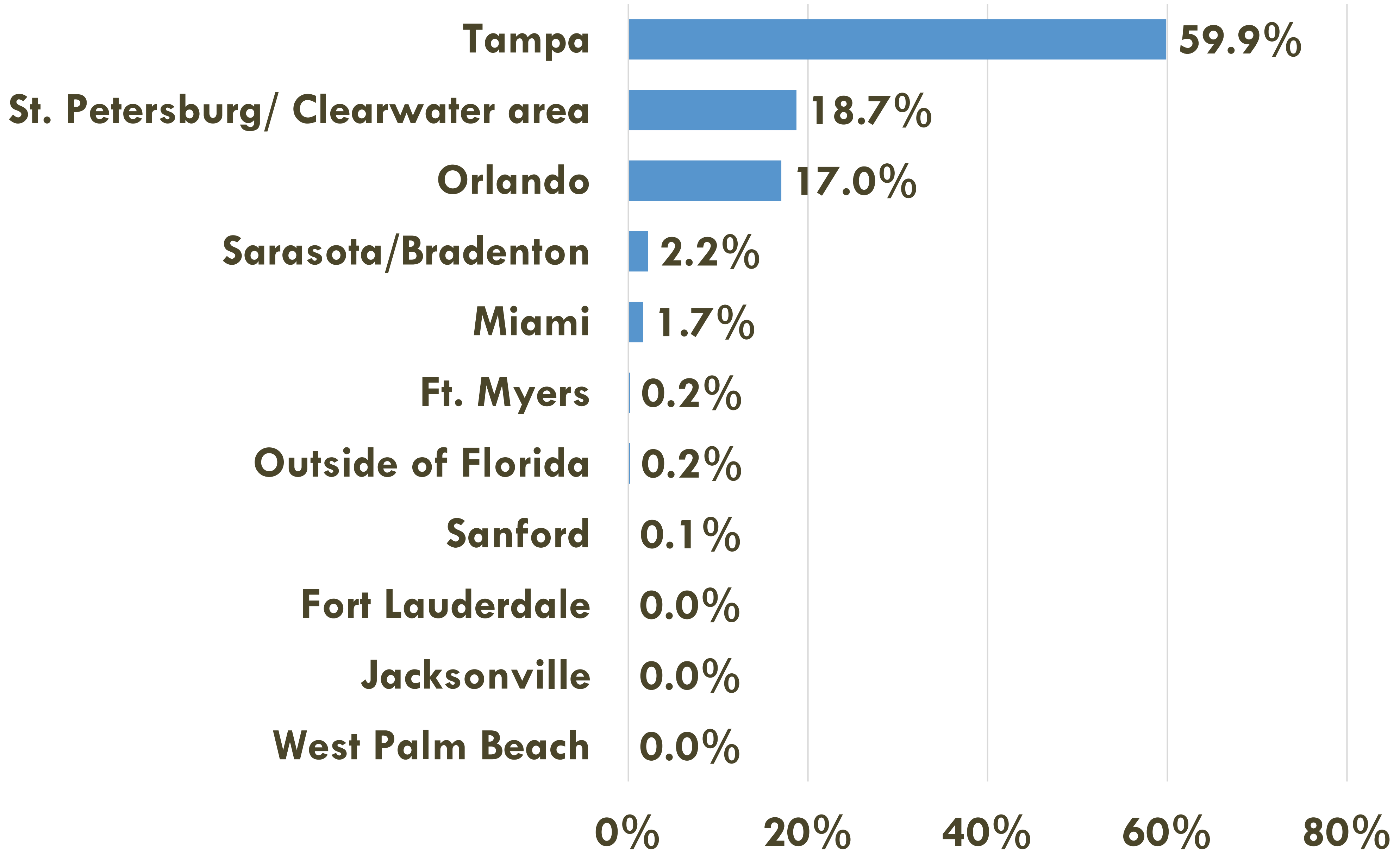
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Personal vehicle	39.3%	**89.4%**	**83.7%**
Rental vehicle	40.6%	10.0%	13.5%
Uber, Lyft, etc.	18.0%	3.8%	2.4%
Free Beach Rides	3.1%	0.0%	0.0%
Public bus	1.3%	0.4%	0.1%
RV	0.5%	0.0%	0.0%
Bicycle	0.0%	0.0%	0.2%
Boat	0.0%	0.0%	0.2%
Taxi or limo	0.5%	0.0%	0.0%
Motorcycle	0.0%	0.0%	0.1%
Tour bus	0.0%	0.0%	0.0%
Sample Size:	**311**	**327**	**409**

RENTAL VEHICLE PICK-UP CITY

About 60 percent of visitors who used a rental car in the area picked up their rental in Tampa (59.9% -- down from 63.5% in Q1 2021). 18.7 percent of St. Pete/Clearwater visitors rented their vehicle in Pinellas County (up from 14.4% in Q1 2021and 10.6% in Q4 2021). Additionally, 17.0 percent of visitors picked up their rental in Orlando and 2.2 percent in Sarasota/Bradenton. Of visitors surveyed, hotel guests were the likeliest segment to have rented their vehicle in St. Pete/Clearwater (33.7% -- up from 19.4% in Q1 2021). respectively).

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. 306 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Tampa	54.9%	81.4%	51.2%
St. Petersburg/ Clearwater area	**33.7%**	15.0%	7.2%
Orlando	8.3%	0.9%	35.1%
Sarasota/Bradenton	0.6%	0.0%	4.5%
Miami	2.4%	0.0%	2.0%
Ft. Myers	0.0%	0.9%	0.0%
Outside of Florida	0.0%	0.9%	0.0%
Sanford	0.0%	0.9%	0.0%
Fort Lauderdale	0.0%	0.0%	0.0%
Jacksonville	0.0%	0.0%	0.0%
West Palm Beach	0.0%	0.0%	0.0%
Sample Size:	**127**	**32**	**48**

TRAVEL PARTY SIZE

Typically, travel groups to St. Pete/Clearwater were comprised of 2.2 people, which included 0.8 adult males, 1.1 adult females and 0.4 children aged 17 years or younger. In Q1 2022, 17.6 percent of visitors had children in their group (vs. 16.4% in Q1 2020). VFRs were the likeliest to be travelling with children (21.9%). Compared to Q1 2021, when 14.0 percent of VFRs had children in their party, a higher 21.9 percent of VFR travel parties included children in Q1 2022.

Figure 11: Travel Party Size

	Mean
Male adults (18 yrs. +)	0.8
Female adults (18 yrs. +)	1.1
Male children (0 to 17 yrs.)	0.2
Female children (0 to 17 yrs.)	0.2
Average Travel Party Size	**2.2**
Percent with children in party	17.6%
Sample Size:	**1,319**

Question: How many people of each type are in your immediate travel party, including yourself?
Base: All Respondents. 1,319 responses.

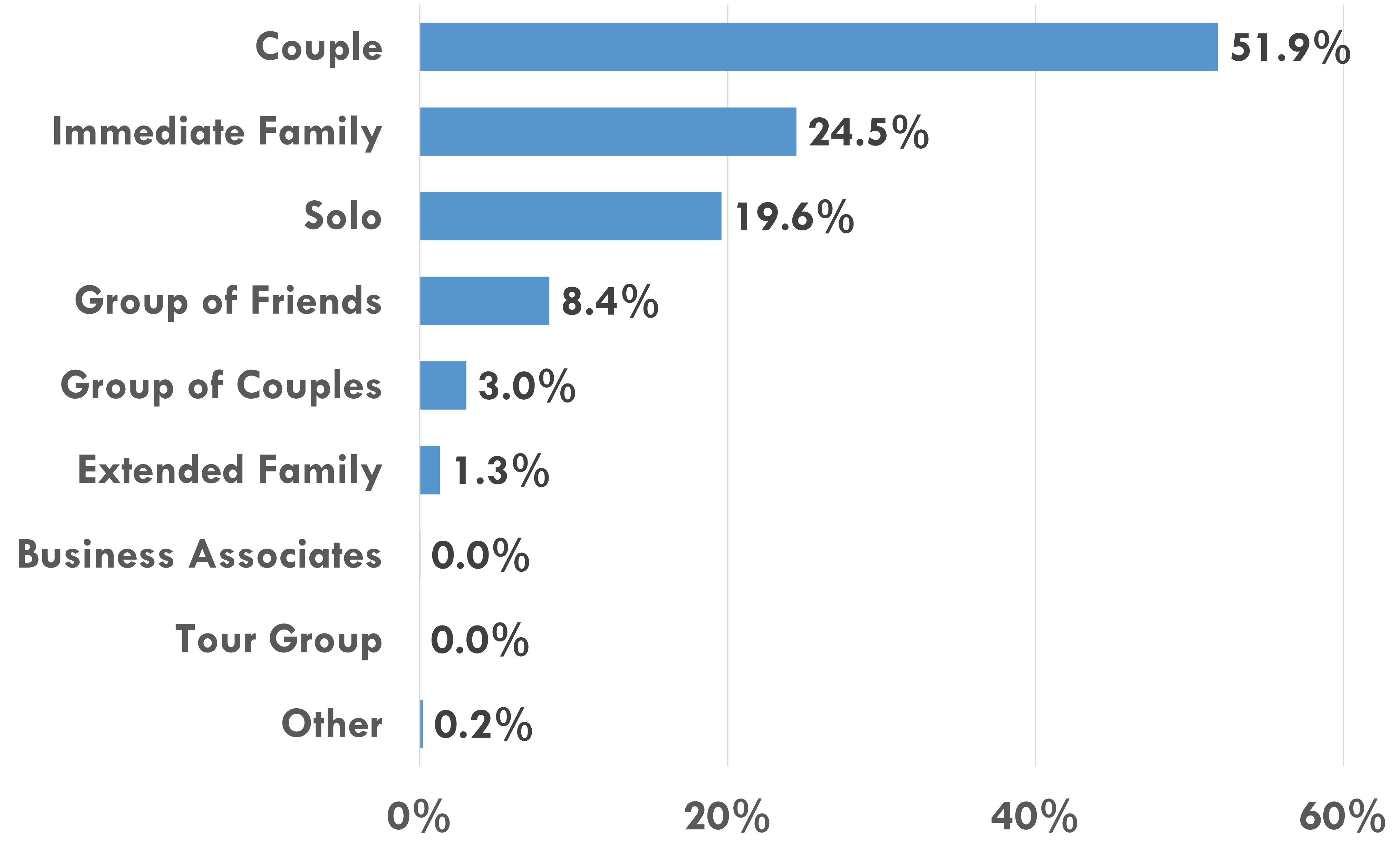
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Male adults (18 yrs. +)	0.9	0.7	0.7
Female adults (18 yrs. +)	1.0	1.0	1.2
Male children (0 to 17 yrs.)	0.1	0.2	0.2
Female children (0 to 17 yrs.)	0.1	0.2	0.1
Average Travel Party Size	**2.1**	**2.1**	**2.2**
Percent with Children in Party	13.9%	**21.9%**	17.3%
Sample Size:	**318**	**326**	**408**

TRAVEL PARTY COMPOSITION

St. Pete/Clearwater visitors most commonly travelled to the destination as a couple (51.9%). In addition, one-quarter said they were travelling with immediate family (down from 29.7% in Q1 2021), 19.6 percent traveled solo (up from 13.7% in Q1 2021), and 8.4 percent said they were with a group of friends (down from 11.6% in Q1 2021). Hotel guests were the most likely to travel as a couple (64.5% -- up from 56.6% in Q1 2021), while VFRs continue to be the segment likeliest to travel alone (27.3%).

Figure 12: Travel Party Composition



Question: Which best describes your travel group on this trip? Are you…? (Select all that apply)
Base: All Respondents. 1,323 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Couple	**64.5%**	47.4%	45.6%
Immediate Family	21.4%	25.1%	24.6%
Solo	13.4%	**27.3%**	22.5%
Group of Friends	3.2%	1.9%	12.7%
Group of Couples	1.7%	0.0%	4.4%
Extended Family	0.8%	0.9%	1.3%
Business Associates	0.3%	0.0%	0.0%
Tour Group	0.0%	0.0%	0.0%
Other	0.0%	0.0%	0.3%
Sample Size:	**317**	**327**	**409**

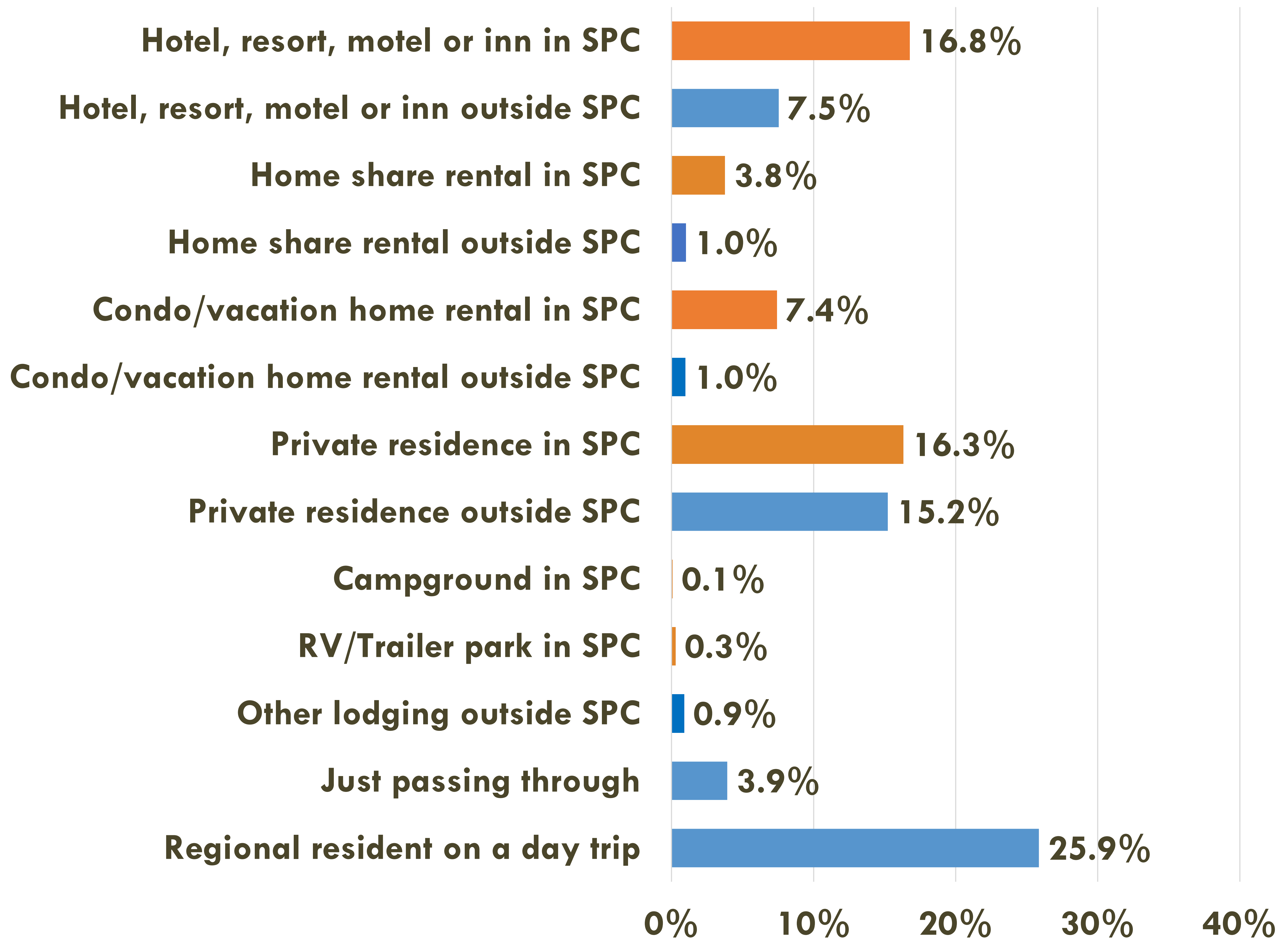
LODGING TYPE

Nearly half of all visitors surveyed in Q1 2022 stayed overnight in St. Pete/Clearwater (44.7% -- up from 38.5% in Q1 2021). About 30 percent of overnight visitors stayed in paid accommodations, such as a St. Pete/Clearwater hotel (16.8% vs. 19.6% in Q1 2021), condo/vacation home rental (7.4%) or a home share rental (3.8%). In total, 16.3 percent of overnight visitors stayed in a private residence – up from 2.8 percent in Q1 2021, which corresponds with the drastic increase of travelers who came to the destination to visit family or friends.

Day-trippers—including those staying in paid or private accommodations outside the St. Pete/Clearwater area and regional residents on leisure day trips—represented 51.4 percent of visitors surveyed (down from 60.1% in Q1 2021).

Question: Where are you staying overnight on this trip to the St. Pete/Clearwater area? (Select one) Base: All Respondents. 1,325 responses.

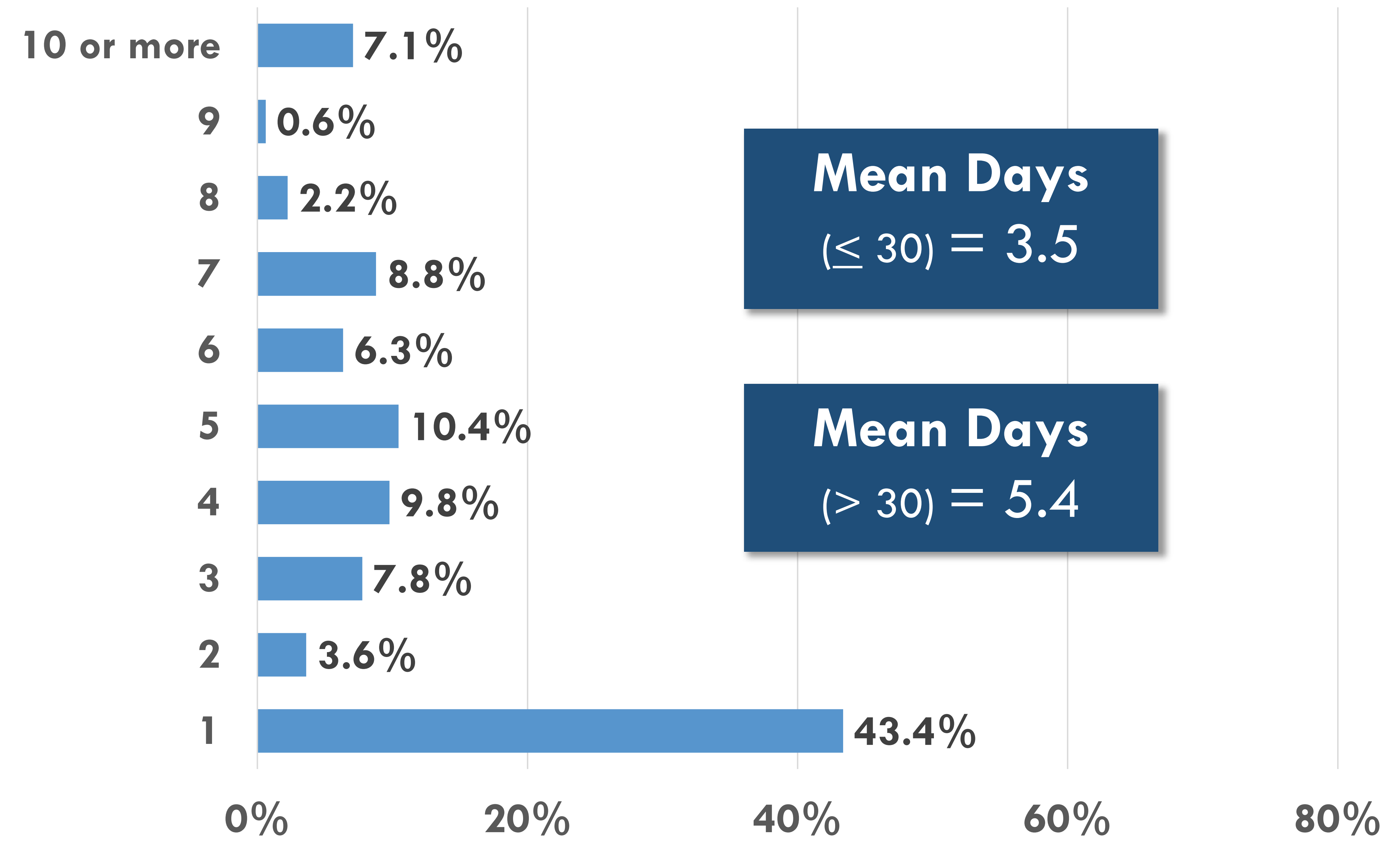
Figure 13: Type of Lodging



DAYS IN ST. PETE/CLEARWATER

Similar to Q1 2021, the average visitor surveyed stayed in St. Pete/Clearwater for 3.5 days. VFRs reported the longest length of stay averaging 5.7 days (down from 6.8 days in Q1 2021), followed by hotel guests who reported an average of of 5.2 days (up from 4.6 days in Q1 2021). Looking specifically at visitors who had extended stays of more than 30 days, their average length of stay was 5.4 days in the destination, with VFRs averaging the longest stay (9.8 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. 1,325 responses.

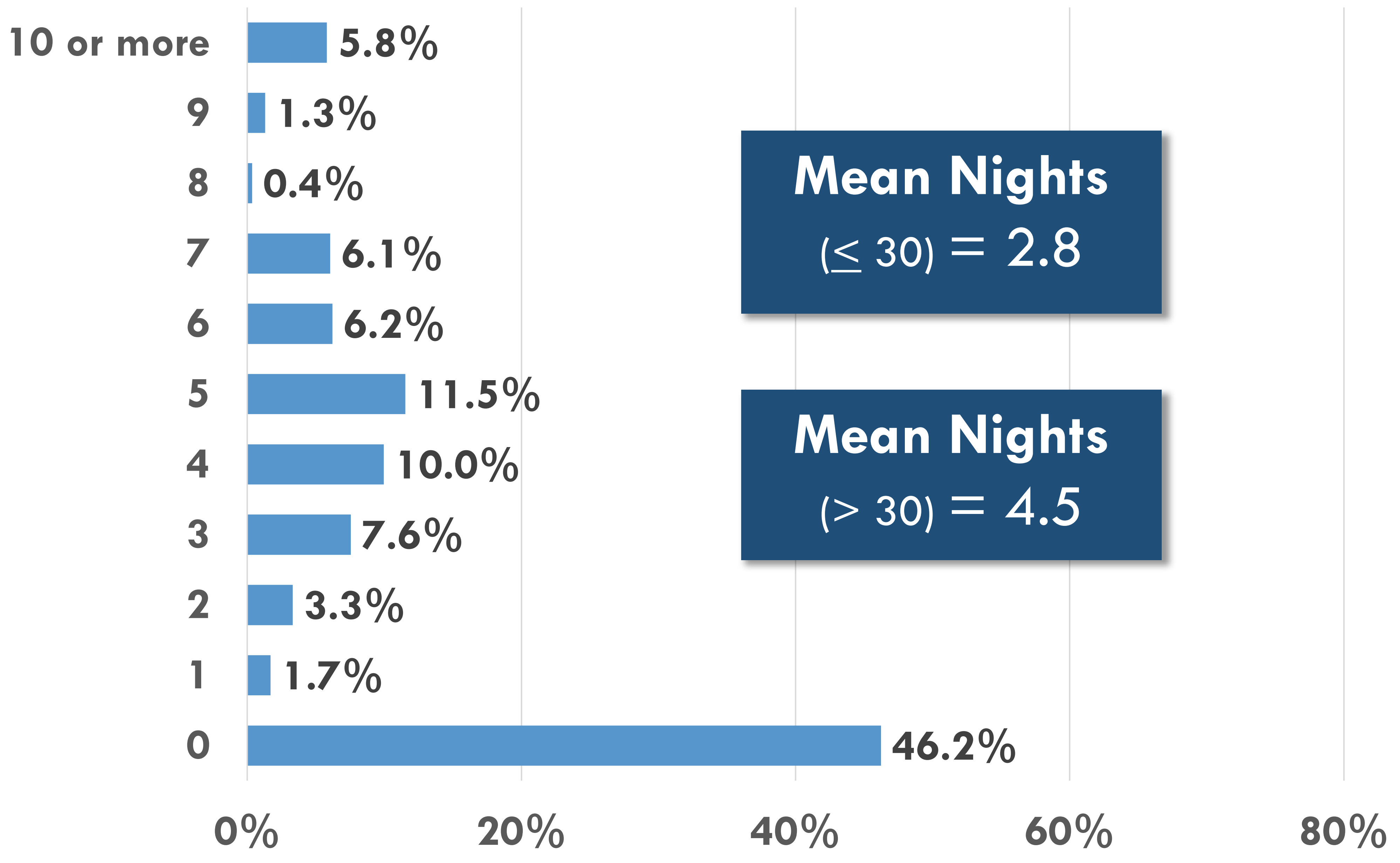
Detail by Traveler Segment

	Hotel	VFR	Day Trip
10 or more	5.6%	12.6%	1.6%
9	0.3%	0.4%	0.7%
8	3.3%	3.7%	0.2%
7	10.4%	13.3%	4.2%
6	10.0%	12.9%	0.9%
5	27.3%	21.0%	2.3%
4	26.7%	21.1%	1.9%
3	12.7%	12.9%	5.3%
2	2.3%	1.8%	5.2%
1	1.5%	0.3%	77.7%
Mean Days (<30)	**5.2**	**5.7**	**1.7**
Mean Days (>30)	**5.6**	**9.8**	**2.1**
Sample Size:	**318**	**327**	**409**

NIGHTS IN ST. PETE/CLEARWATER

On average, visitors spent 2.8 nights in St. Pete/Clearwater, an increase from 2.5 nights in Q1 2021. 18.7 percent of visitors surveyed spent a week or more in the destination, up from 14.2 percent in Q1 2021. As in the past, VFRs averaged the longest stays, with 24.2 percent staying 7 or more nights in the area.

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. 1,325 responses.

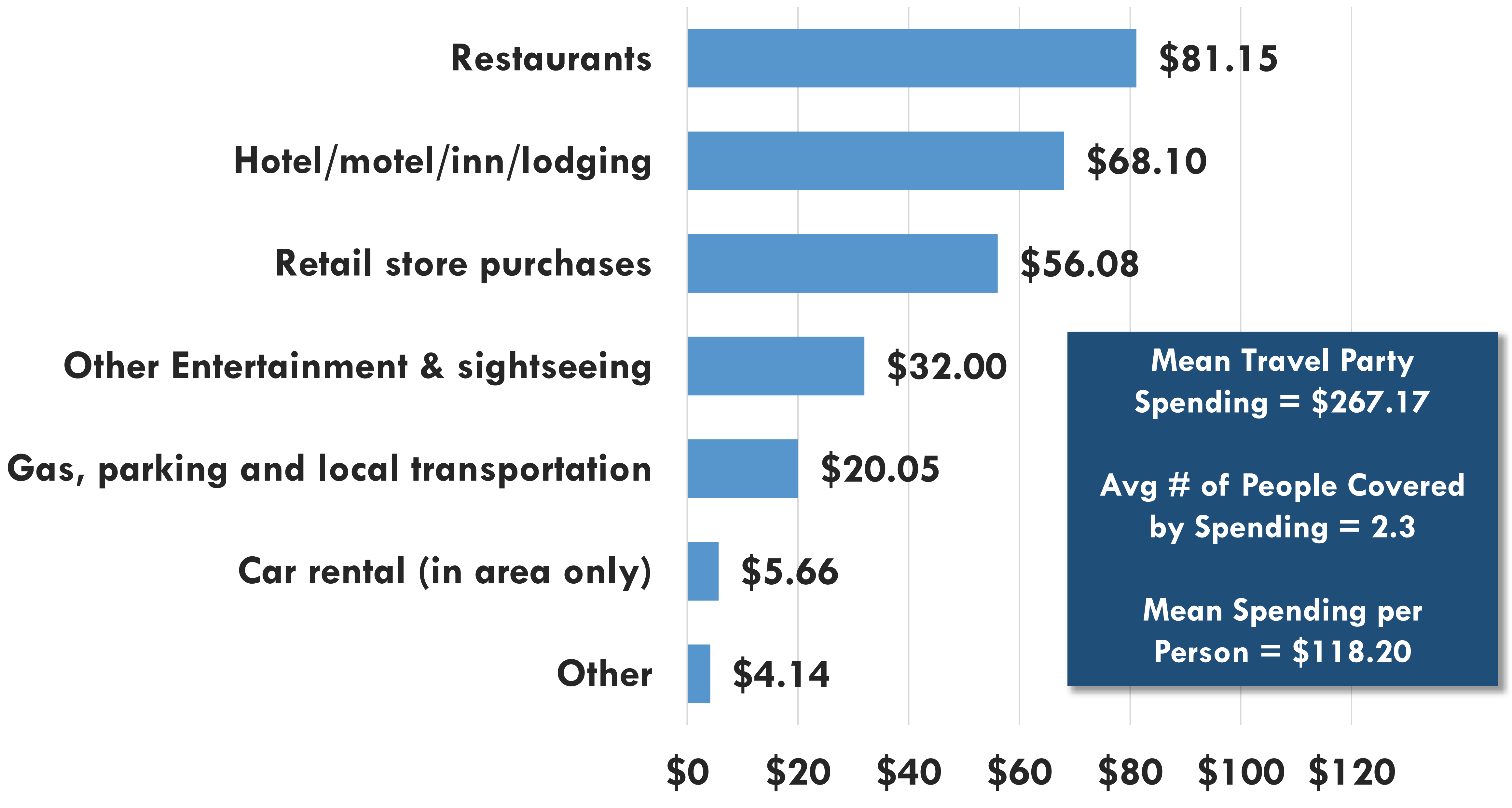
Detail by Traveler Segment

	Hotel	VFR	Day Trip
10 or more	4.2%	11.3%	--
9	1.5%	0.9%	--
8	0.5%	0.8%	--
7	5.7%	11.2%	--
6	9.6%	9.6%	--
5	22.5%	25.7%	--
4	25.8%	19.3%	--
3	18.6%	15.0%	--
2	8.8%	4.5%	--
1	2.0%	0.7%	--
0	0.8%	1.0%	100%
Mean Nights (<30)	**4.6**	**5.4**	**--**
Mean Nights (>30)	**5.1**	**9.2**	**--**
Sample Size:	**318**	**327**	**409**

DAILY SPENDING IN-MARKET

The average St. Pete/Clearwater visitors spent $267.17 per travel party in Pinellas County, comparable to $268.00 in Q1 2021. It is estimated that the average visitor represented $118.20 per person in daily spending, covering an average of 2.3 travelers. Hotel guests reported the highest spending, averaging $485.53 per travel party. Based on the reported daily spending of $485.53 covering 2.2 people, it is estimated that the average hotel guest visitor represented $224.50 per person. Per day, this group spent an average of $246.79 for paid lodging. VFRs reported an average daily spending of $220.61 per party and $105.14 per person, an increase from $143.38 per party and $68.23 per person in Q1 2021.

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. 1,284 responses.

Detail by Traveler Segment

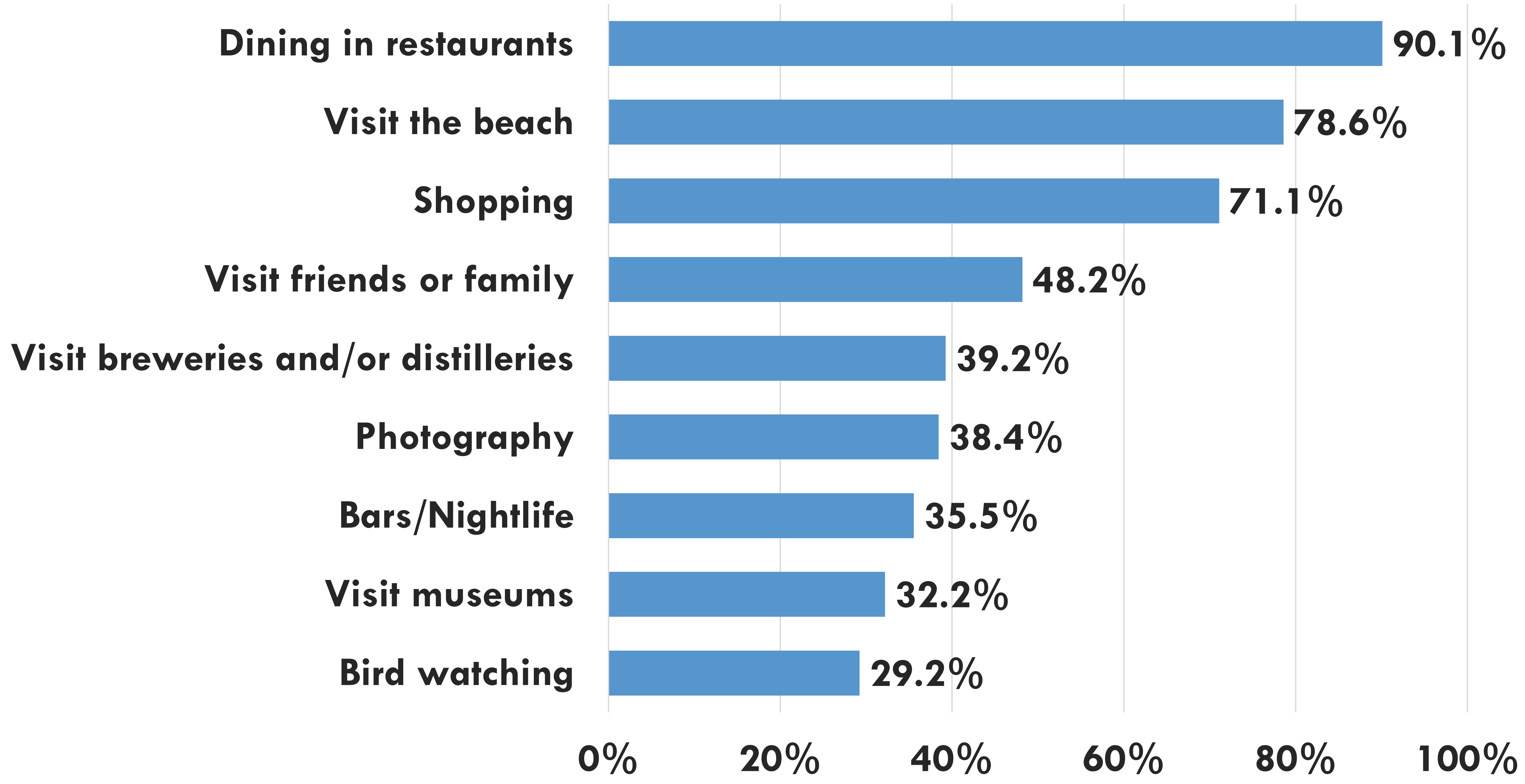
	Hotel	VFR	Day Trip
Restaurants	$101.15	$73.47	$66.34
Hotel/motel/inn/lodging	$246.79	$5.92	$4.47
Retail store purchases	$54.27	$62.78	$57.16
Other Entertainment & sightseeing	$31.69	$40.72	$31.70
Gas, parking and local transportation	$29.05	$23.87	$16.67
Car rental (in area only)	$18.61	$1.89	$2.23
Other	$3.96	$11.96	$0.73
Mean Spending per Travel Party	**485.53**	**220.61**	**179.30**
# of People Covered by Spending	2.2	2.1	2.3
Mean Spending per Person	**$224.50**	**$105.14**	**$79.46**
Sample Size:	**303**	**316**	**403**

TRIP ACTIVITIES

Dining in restaurants (90.1%), visiting the beach (78.6%) and shopping (71.1%) were the most common activities visitors participated in during their stay.

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. 1,314 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Dining in restaurants	92.9%	93.5%	87.0%
Visit the beach	91.3%	90.9%	67.7%
Shopping	76.0%	85.6%	63.8%
Visit friends or family	25.9%	79.2%	50.9%
Visit breweries and/or distilleries	34.0%	57.9%	40.5%
Photography	51.2%	48.5%	33.5%
Bars/Nightlife	34.8%	56.7%	32.9%
Visit museums	33.2%	43.4%	32.1%
Bird watching	31.5%	46.5%	26.5%
Sample Size:	**315**	**324**	**406**

TRIP ACTIVITIES – FULL DETAIL

	Total	Hotel	VFR	Day Trip
Dining in restaurants	90.1%	**92.9%**	**93.5%**	87.0%
Visit the beach	78.6%	**91.3%**	**90.9%**	67.7%
Shopping	71.1%	**76.0%**	**85.6%**	63.8%
Visit friends or family	48.2%	25.9%	79.2%	50.9%
Visit breweries and/or distilleries	39.2%	34.0%	**57.9%**	40.5%
Photography	38.4%	51.2%	48.5%	33.5%
Bars/Nightlife	35.5%	34.8%	**56.7%**	32.9%
Visit museums	32.2%	33.2%	**43.4%**	32.1%
Bird watching	29.2%	31.5%	**46.5%**	26.5%
Swimming	18.5%	32.8%	26.5%	6.1%
Guided tour	18.3%	31.6%	22.0%	11.1%
Other boating	12.1%	19.2%	**23.2%**	6.9%
Fishing	10.4%	14.6%	15.2%	7.4%
Biking	4.7%	8.1%	5.4%	3.4%
Jet skiing	4.0%	6.8%	3.7%	3.0%
Attend a festival or special event	3.6%	3.9%	6.5%	2.6%
Shelling	2.6%	3.0%	0.8%	2.6%
Kayaking/Canoeing	2.3%	8.2%	2.5%	0.0%
Paddle boarding	1.8%	1.2%	2.2%	2.2%
Golf	1.6%	3.3%	1.4%	0.2%
Take a dining cruise	1.5%	3.1%	1.0%	0.7%
Parasailing	1.0%	1.3%	0.0%	1.0%
Baseball Spring Training	1.0%	1.3%	0.2%	0.9%
Attend or participate in a sporting event	0.9%	1.3%	1.9%	0.3%
Sailing	0.4%	1.3%	0.3%	0.2%
Sample Size:	**1,314**	**315**	**324**	**406**

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 went shopping while in St. Pete/Clearwater.
- In addition, VFRs were likelier to have visited a brewery or a museum, enjoyed bars & nightlife, went bird watching or went boating.

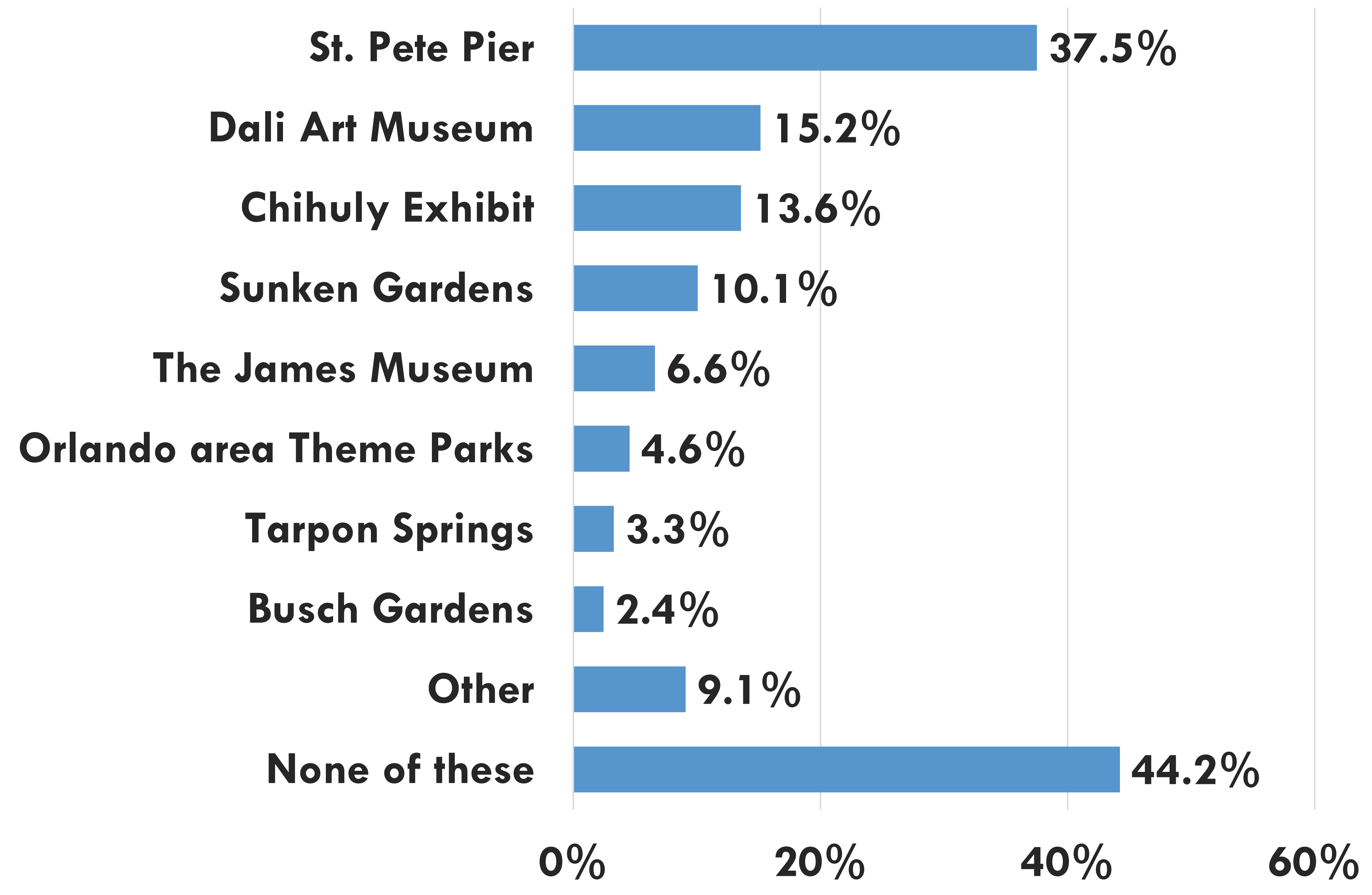
Question: Which of these activities did you, or will you, participate in while in the St. Pete/Clearwater area? (Select all that apply)

Base: All Respondents. 1,314 responses.

ATTRACTIONS VISITED

Attractions most commonly frequented by visitors in Q1 2022 were the St. Pete Pier (37.5%), the Dali Museum (15.2%) and the Chihuly Exhibit (13.6%). VFRs were the likeliest of all segments to have visited a variety of Pinellas County attractions: the St. Pete Pier (65.0%), the Dali Museum (22.4%), the Chihuly Exhibit (19.6%), Sunken Gardens (13.2%), as well as the James Museum (12.7%). Meanwhile, day trippers were more likely than other segments to have visited Orlando area theme parks (7.2%).

Figure 18: Attractions Visited



Question: Which of these attractions did you (or will you) visit while on this trip? (Select all that apply) Base: All Respondents. 1,291 responses.

Detail by Traveler Segment

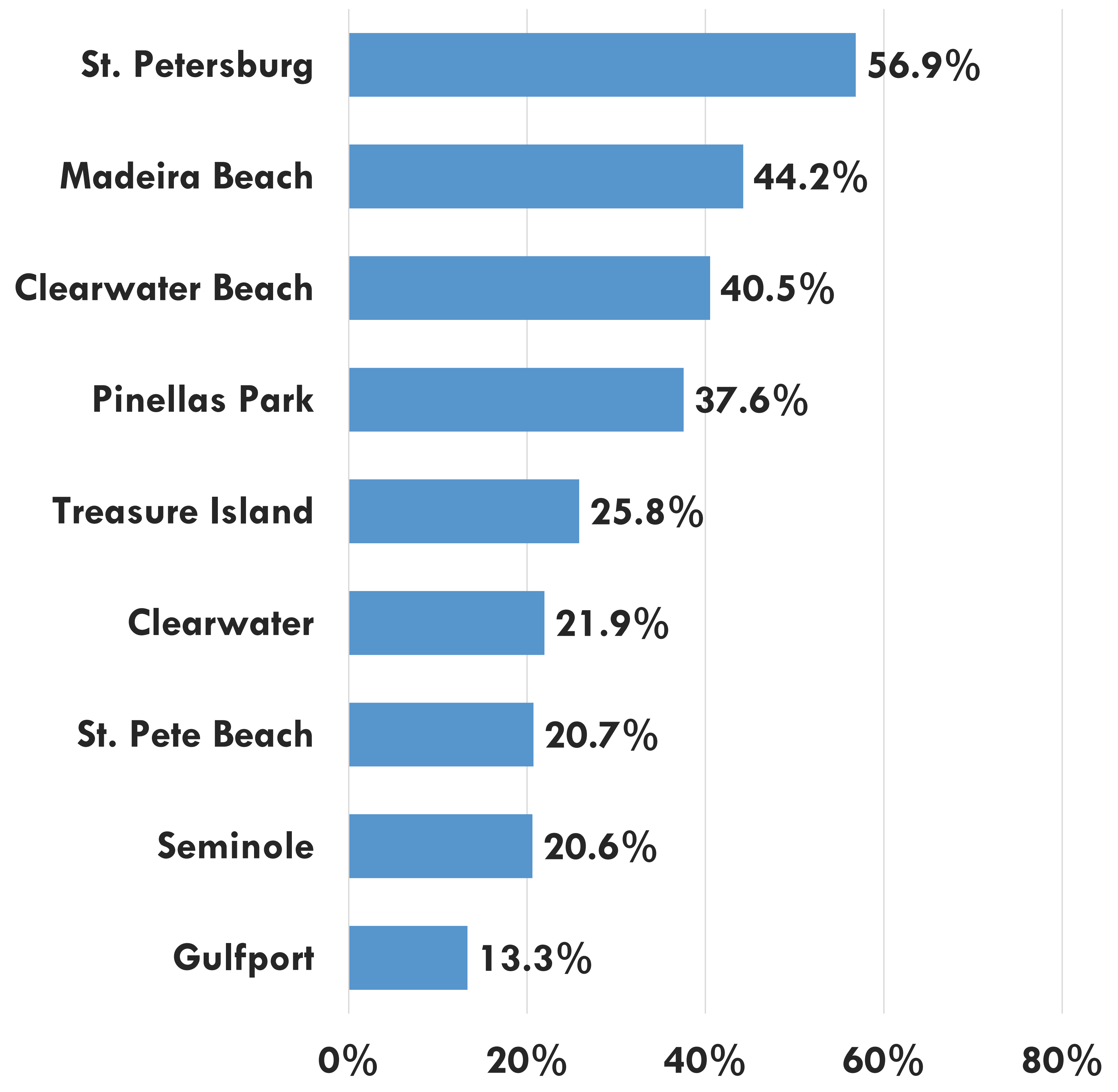
	Hotel	VFR	Day Trip
St. Pete Pier	39.3%	**65.0%**	32.1%
Dali Art Museum	21.1%	**22.4%**	12.9%
Chihuly Exhibit	17.4%	**19.6%**	12.3%
Sunken Gardens	6.5%	**13.2%**	11.2%
The James Museum	8.8%	**12.7%**	4.9%
Orlando area Theme Parks	1.5%	1.4%	**7.2%**
Tarpon Springs	1.6%	4.4%	2.5%
Busch Gardens	3.1%	5.2%	1.5%
Other	14.7%	10.2%	8.0%
NONE OF THESE	50.1%	24.0%	44.8%
Sample Size:	**301**	**325**	**400**

TOP COMMUNITIES VISITED

Visitors most frequented St. Petersburg (56.9% -- up from 50.3% in Q1 2021), Madeira Beach (44.2% -- up from 33.4% in Q1 2021), Clearwater Beach (40.5% -- slightly up from 37.7% in Q1 2021), and Pinellas Park (37.6% -- up from 2.4% in Q1 2021 and 13.3% in Q4 2021). Other communities visited were Treasure Island, Clearwater, St. Pete Beach, Seminole and Gulfport, all of which gained popularity since Q1 2021.

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. 1,323 responses.

COMMUNITIES VISITED – FULL DETAIL

	Total	Hotel	VFR	Day Trip
St. Petersburg	56.9%	43.8%	79.0%	**57.4%**
Madeira Beach	44.2%	55.7%	63.3%	29.0%
Clearwater Beach	40.5%	**52.4%**	38.2%	35.5%
Pinellas Park	37.6%	36.2%	**56.7%**	37.3%
Treasure Island	25.8%	37.0%	40.7%	14.5%
Clearwater	21.9%	25.6%	44.6%	15.0%
St. Pete Beach	20.7%	34.9%	34.3%	8.6%
Seminole	20.6%	22.4%	39.4%	16.3%
Gulfport	13.3%	16.3%	22.3%	10.1%
Dunedin	8.2%	5.5%	17.9%	4.6%
Indian Shores & Indian Rocks Beach	7.6%	10.9%	11.0%	1.5%
Largo	7.6%	5.3%	19.7%	3.9%
Safety Harbor	5.9%	6.9%	13.7%	3.8%
Tarpon Springs	5.7%	2.3%	9.1%	4.1%
North Redington Beach/Redington Shores	4.9%	8.3%	5.6%	0.6%
Palm Harbor	3.2%	2.6%	4.3%	2.8%
Pass-A-Grille Beach	2.8%	6.1%	1.8%	1.4%
Tierra Verde	1.4%	2.5%	1.1%	0.9%
Oldsmar	0.2%	0.0%	1.1%	0.0%
Sample Size:	**1,323**	**318**	**326**	**409**

Interesting differences seen amongst visitor types:

- Hotel guests were the most likely segment to have visited Clearwater Beach during their trip to the St. Pete/Clearwater area.
- VFRs continued to be the likeliest segment to have visited most of all Pinellas County communities. The gain in Pinellas Park's popularity corresponds with the drastic increase in family & friends being the primary reason for a trip to the St. Pete/Clearwater area.
- St. Petersburg remained the community day trippers were most likely to have visited during their time in Pinellas County.

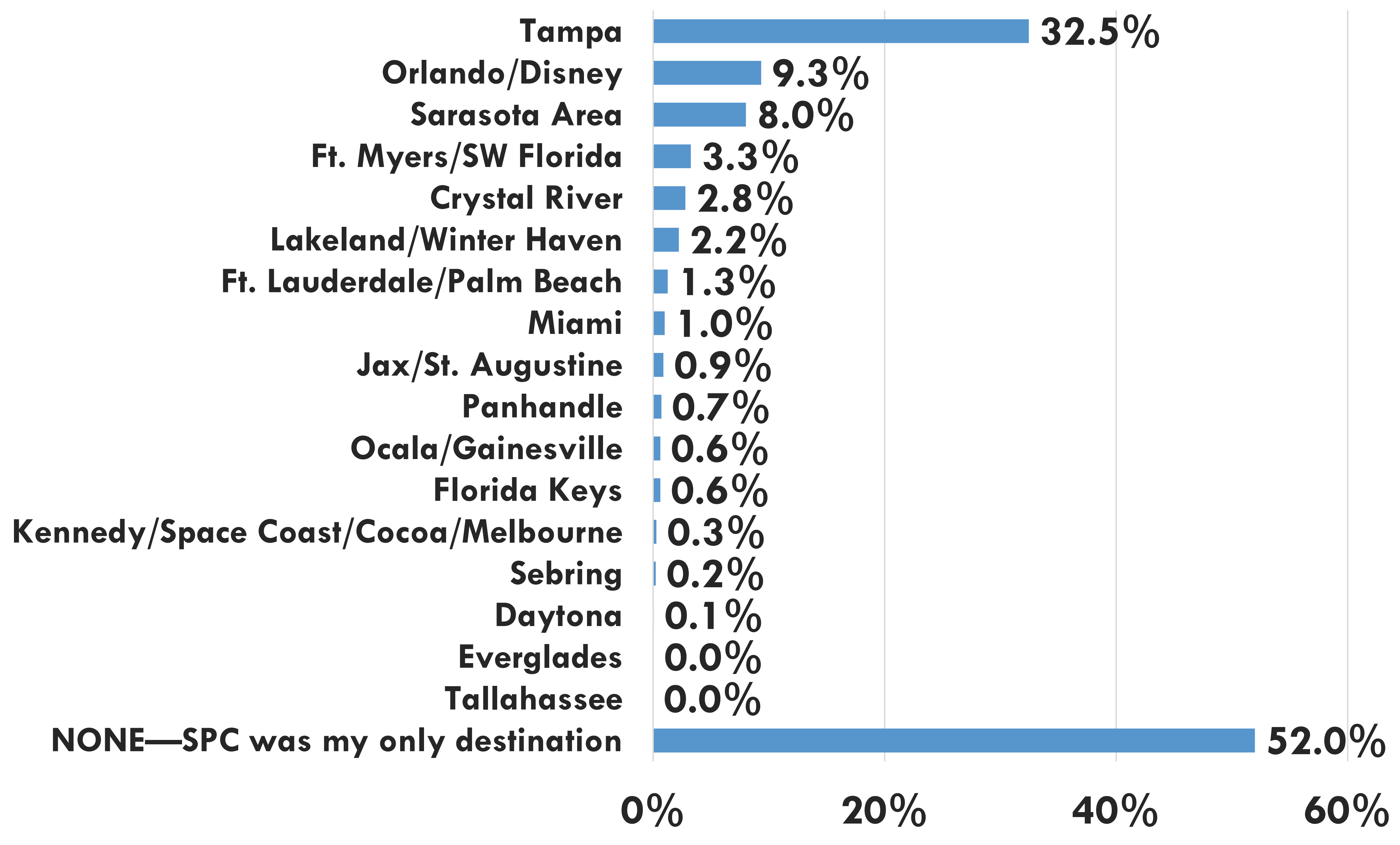
Question: Which of the following communities in the St. Pete/Clearwater area did you visit? (Show list. Select all that apply)

Base: All Respondents. 1,323 responses.

OTHER DESTINATIONS VISITED

St. Pete/Clearwater was the only destination for over half of all visitors surveyed in Q1 2022 (52.% vs 36.2% in Q1 2021). Provided with a list of areas outside St. Pete/Clearwater, visitors were asked which they had visited or planned to visit as part of their current trip. Respondents were likeliest to have visited Tampa (32.5%), Orlando/Disney (9.3%) and/or the Sarasota area (8.0%). Other destinations included Ft. Myers/SW Florida (3.3%), Crystal River (2.8%), Lakeland/Winter Haven (2.2%), Ft. Lauderdale/Palm Beach (1.3%) and Miami (1.0%).

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. 1,284 responses.

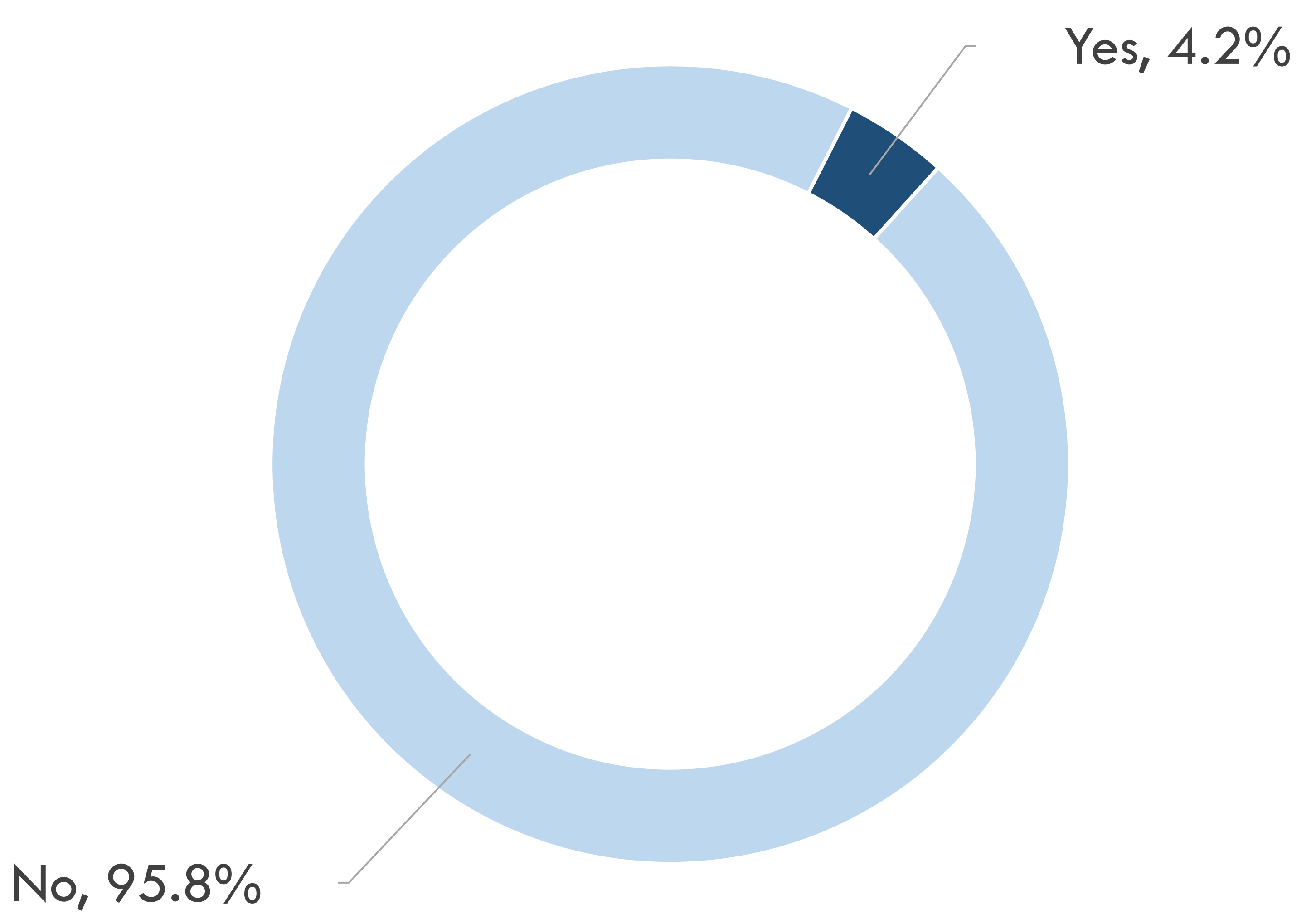
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Tampa	26.3%	39.6%	30.2%
Orlando/Disney	6.1%	3.9%	12.4%
Sarasota Area	6.6%	4.5%	8.0%
Ft. Myers/SW Florida	6.3%	1.8%	3.0%
Crystal River	2.0%	1.5%	3.6%
Lakeland/Winter Haven	0.8%	1.6%	2.7%
Ft. Lauderdale/Palm Beach	0.3%	0.6%	1.9%
Miami	2.5%	1.1%	0.6%
Jax/St. Augustine	1.5%	0.1%	1.0%
Panhandle	1.2%	0.0%	0.9%
Ocala/Gainesville	0.5%	0.6%	0.5%
Florida Keys	0.8%	0.3%	0.7%
Kennedy/Space Coast/Cocoa/Melbourne	1.0%	0.1%	0.0%
Sebring	0.3%	0.0%	0.0%
Daytona	0.3%	0.1%	0.0%
Everglades	0.3%	0.0%	0.0%
Tallahassee	0.0%	0.0%	0.0%
NONE—SPC was my only destination	56.5%	53.5%	52.2%
Sample Size:	**303**	**325**	**397**

FIRST-TIME VISIT TO FLORIDA

Only 4.2% of all St. Pete/Clearwater area visitors surveyed in Q1 2022 were in the state of Florida for the first time. Nearly all visitors surveyed had previously been to Florida (95.8%). VFRs were more likely than other segments to have visited Florida in the past (97.5%), while 6.3 percent of Hotel guests were first-time visitors.

Figure 21: First-Time Visitors to Florida



Question: Is this your first visit to Florida? Base: All Respondents 1,316 responses.

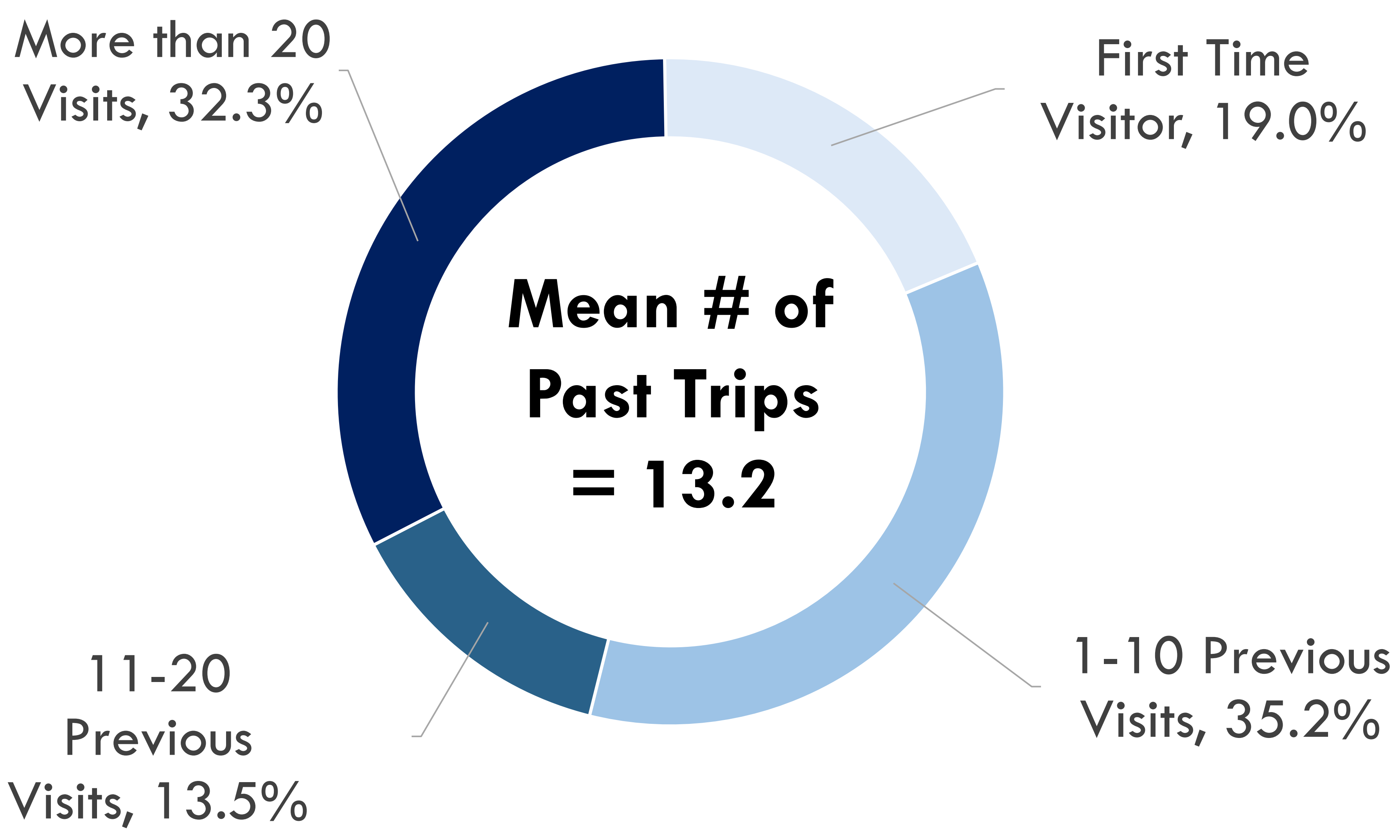
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Yes	**6.3%**	2.5%	4.4%
No	93.7%	**97.5%**	95.6%
Sample Size:	**316**	**324**	**407**

PREVIOUS VISITATION TO ST. PETE/CLEARWATER

Nearly one-in-five visitors were in the St. Pete/Clearwater area for the first time (19.0% -- down from 24.6% in Q1 2021). The average St. Pete/Clearwater visitor surveyed had taken 13.2 previous trips to the destination – up from 7.4 trips in Q1 2021 – with 32.3 percent of visitors having visited the destination more than 20 times. Hotel guests were again the likeliest segment to be first-time visitors to Pinellas County (23.0% -- down from 33.2% in Q1 2021). VFRs reported the most prior visits to St. Pete/Clearwater, averaging 16.1 trips (up from 9.1 trips in Q1 2021), followed by day trippers who averaged 15.2 prior visits (up from 8.7 in Q1 2021).

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. 1,313 responses.

Detail by Traveler Segment

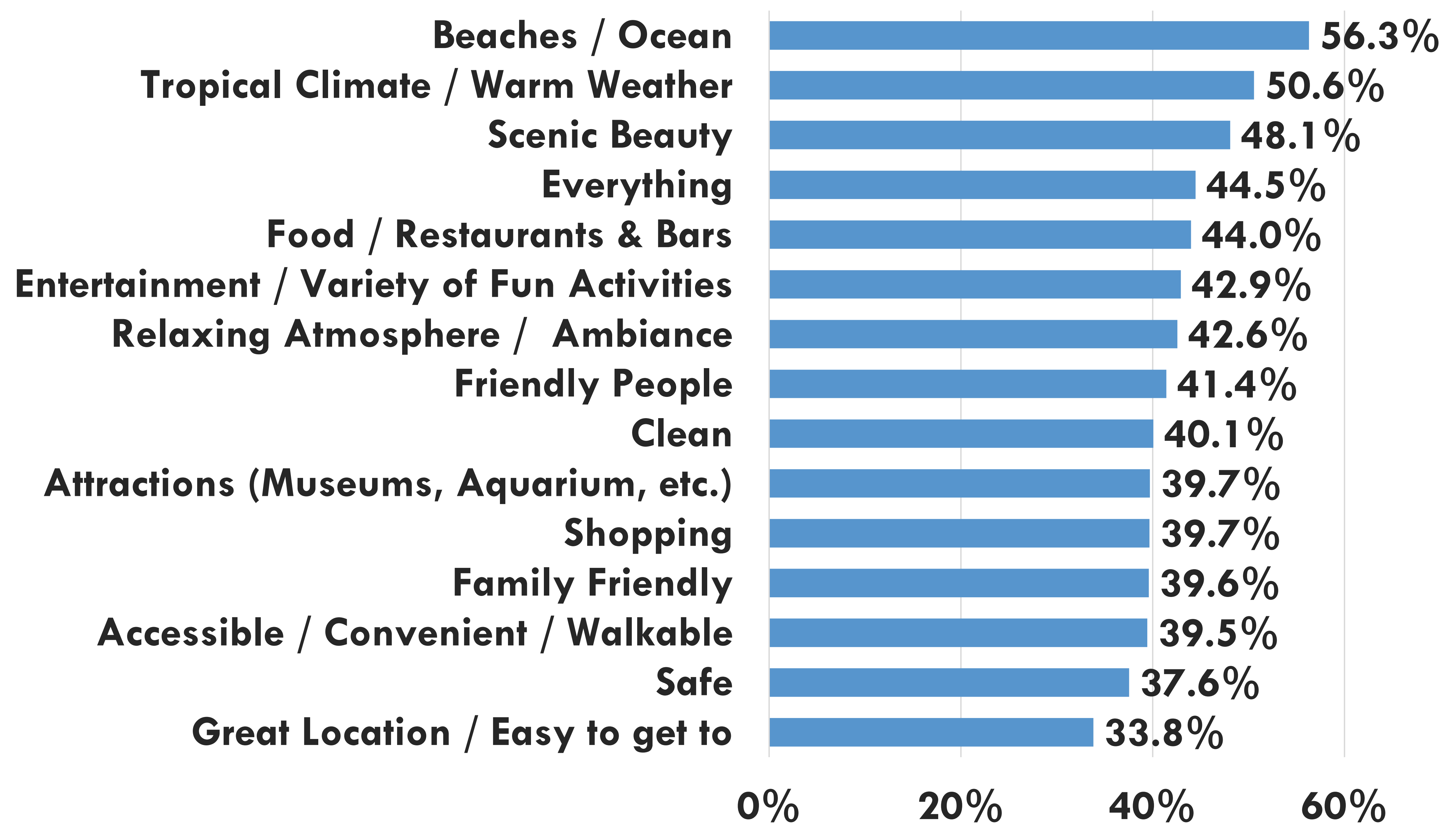
	Hotel	VFR	Day Trip
First-time Visitors	23.0%	10.0%	22.0%
1-10 Previous Visits	48.4%	33.0%	25.3%
11-20 Previous Visits	18.7%	17.3%	11.2%
More than 20 Previous Visits	9.9%	39.7%	41.5%
Mean	**7.8**	**16.1**	**15.2**
Sample Size:	**312**	**323**	**407**

Visitor Satisfaction

MOST LIKED ASPECTS OF ST. PETE/CLEARWATER

St. Pete/Clearwater's beautiful beaches continue to be the most liked aspect (56.3%), followed by tropical climate weather (50.6%) and scenic beauty (48.1%). VFRs were the likeliest segment to like "everything" (73.6%), which included every aspect of the St. Pete/Clearwater area.

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. 1,320 responses.

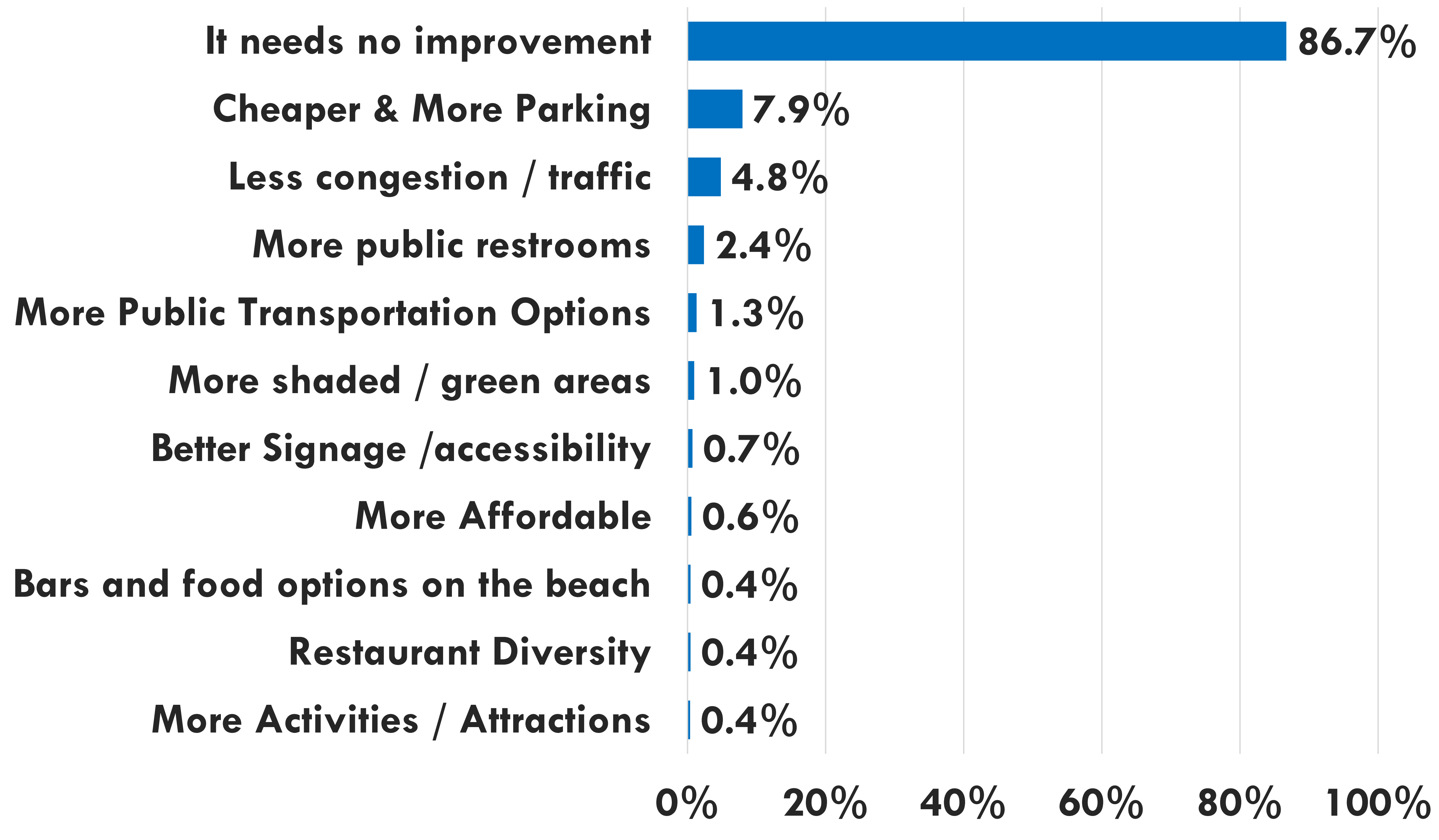
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Beaches / Ocean	63.6%	63.9%	56.8%
Tropical Climate / Warm Weather	51.6%	61.7%	50.9%
Scenic Beauty	48.2%	60.1%	49.8%
Everything	48.6%	**73.6%**	30.8%
Food / Restaurants & Bars	40.4%	57.3%	46.7%
Entertainment / Variety of Fun Activities	36.5%	57.0%	46.2%
Relaxing Atmosphere / Ambiance	41.7%	58.1%	42.7%
Friendly People	39.8%	55.6%	43.5%
Clean	36.4%	54.8%	42.5%
Attractions (Museums, Aquarium, etc.)	34.5%	54.0%	42.6%
Shopping	37.3%	56.4%	40.5%
Family Friendly	37.6%	56.4%	40.5%
Accessible / Convenient / Walkable	38.0%	55.4%	40.5%
Safe	32.7%	54.5%	39.2%
Great Location / Easy to get to	32.4%	50.7%	33.4%
Sample Size:	**318**	**327**	**405**

ATTRACTIONS OR SERVICES THAT WOULD ENHANCE THE DESTINATION EXPERIENCE

When asked what services or additional attractions would enhance their visitor experience in the St. Pete/Clearwater area, nearly nine-in-ten of all visitors reported that the destination needs no improvements (86.7%). Of the specific suggestions provided by visitors, the top cited were cheaper & more parking (7.9%), less congestion/traffic (4.8%)and more public restrooms (2.4%). As in Q1 2021, day trip visitors were the likeliest to suggest cheaper & more parking (10.0% vs. 10.5% in Q1 2021).

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. 1,298 responses.

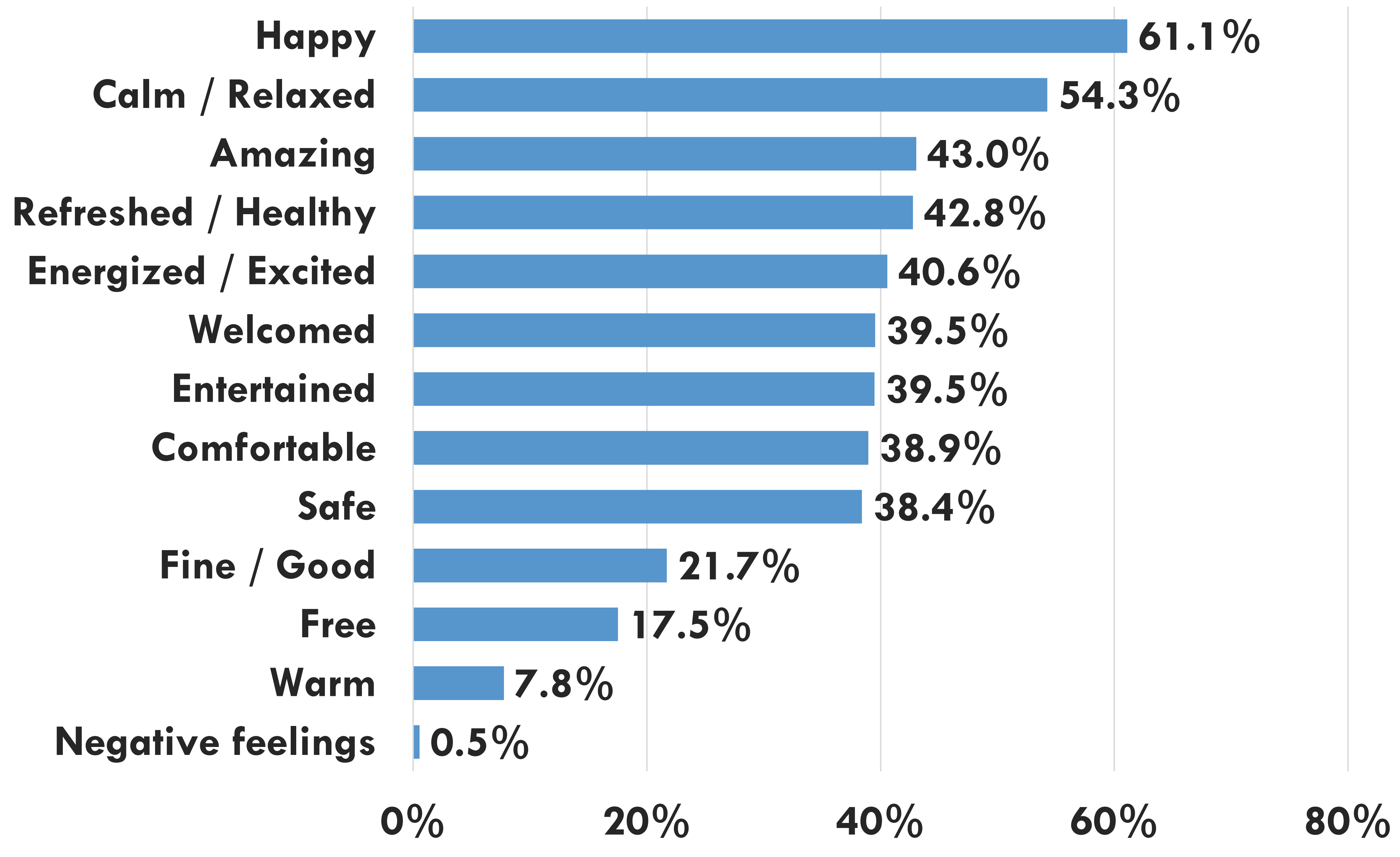
Detail by Traveler Segment

	Hotel	VFR	Day Trip
It needs no improvement	88.9%	94.9%	84.3%
Cheaper & More Parking	3.8%	3.4%	**10.0%**
Less congestion / traffic	3.0%	1.8%	6.2%
More public restrooms	2.8%	1.8%	2.2%
More Public Transportation Options	2.5%	0.9%	0.6%
More shaded / green areas	1.0%	1.2%	0.9%
Better Signage /accessibility	0.5%	0.0%	0.8%
More Affordable	1.0%	0.8%	0.3%
Bars and food options on the beach	1.0%	0.4%	0.2%
Restaurant Diversity	1.2%	0.2%	0.3%
More Activities / Attractions	0.0%	0.4%	0.5%
Sample Size:	**312**	**322**	**404**

FEELINGS IN ST. PETE/CLEARWATER

St. Pete/Clearwater visitors reported feeling happy (61.1%), calm/relaxed (54.3%) and amazing (43.0%) while in the destination. VFRs and day trippers were the likeliest to say they felt happy (72.0% and 67.8%, respectively), while hotel guests were the likeliest segment to report feelings of calmness or relaxation (68.1%).

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. 1,301 responses.

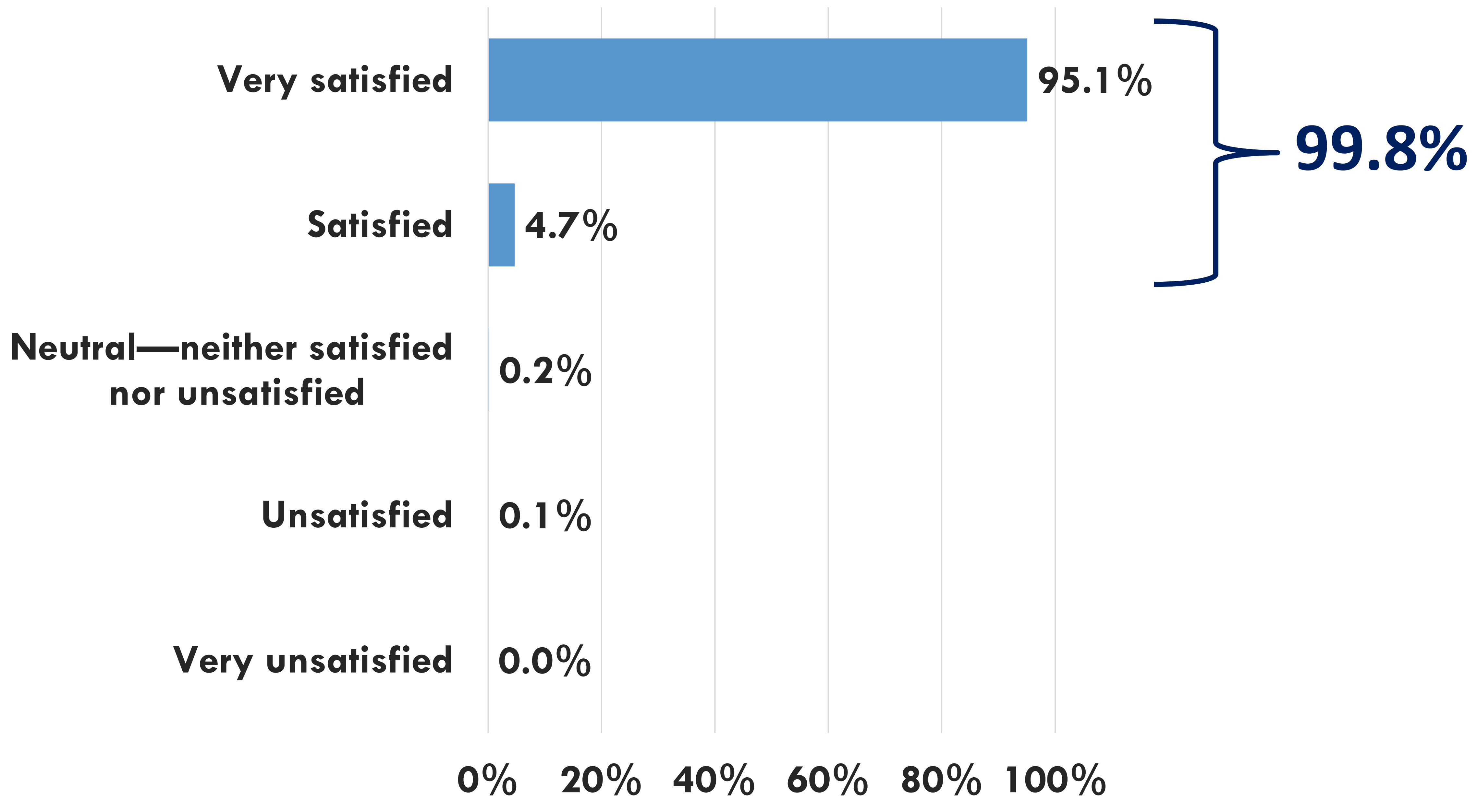
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Happy	48.0%	**72.0%**	**67.8%**
Calm / Relaxed	**68.1%**	56.8%	46.3%
Amazing	36.6%	59.3%	45.9%
Refreshed / Healthy	37.3%	56.7%	45.9%
Energized / Excited	37.0%	55.7%	42.4%
Welcomed	35.3%	55.7%	41.2%
Entertained	34.3%	54.7%	41.8%
Comfortable	34.5%	54.9%	40.7%
Safe	33.5%	54.5%	40.3%
Fine / Good	19.6%	22.2%	25.4%
Free	18.2%	30.8%	15.6%
Warm	8.4%	9.4%	7.7%
Negative feelings	0.5%	0.0%	0.8%
Sample Size:	**312**	**325**	**400**

OVERALL SATISFACTION

St. Pete/Clearwater visitors continued to be highly satisfied with their experience in the destination (99.8% -- up from 92.8% in Q1 2021). Virtually all visitors said they were either satisfied (4.7%) or very satisfied (95.1%) with their experience in St. Pete/Clearwater.

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. 1,321 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Very satisfied	94.6%	98.1%	93.9%
Satisfied	4.5%	1.8%	6.0%
Neutral—neither satisfied nor unsatisfied	0.9%	0.0%	0.0%
Unsatisfied	0.0%	0.1%	0.1%
Very unsatisfied	0.0%	0.0%	0.0%
Sample Size:	**317**	**327**	**406**

LIKELIHOOD TO RECOMMEND

Consistent with the high level of satisfaction, area visitors were also highly likely to say they would recommend the St. Pete/Clearwater area as a travel destination to others.

Visitor rated their likelihood to recommend the destination a 9.9 out of 10 (vs. 9.8 out of 10 in Q1 2021).

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, 321 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
10—Certain to Recommend	89.8%	97.9%	92.9%
9	6.2%	1.4%	3.6%
8	3.2%	0.4%	3.0%
7	0.5%	0.2%	0.3%
6	0.0%	0.0%	0.3%
5	0.0%	0.0%	0.0%
4	0.3%	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%	0.1%	0.0%
Mean Score	**9.8**	**10.0**	**9.9**
Sample Size:	**315**	**327**	**408**

LIKELIHOOD TO RETURN

These highly satisfied visitors also reported a high likelihood to return to St. Pete/Clearwater in the future. In line with their visitor satisfaction and likelihood to recommend the destination as a place to visit to other travelers, the average visitor rated their likelihood to return to the destination a 9.9 out of 10 – up from 9.7 out of 10 in Q1 2021.

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. 1,315 responses.

Detail by Traveler Segment

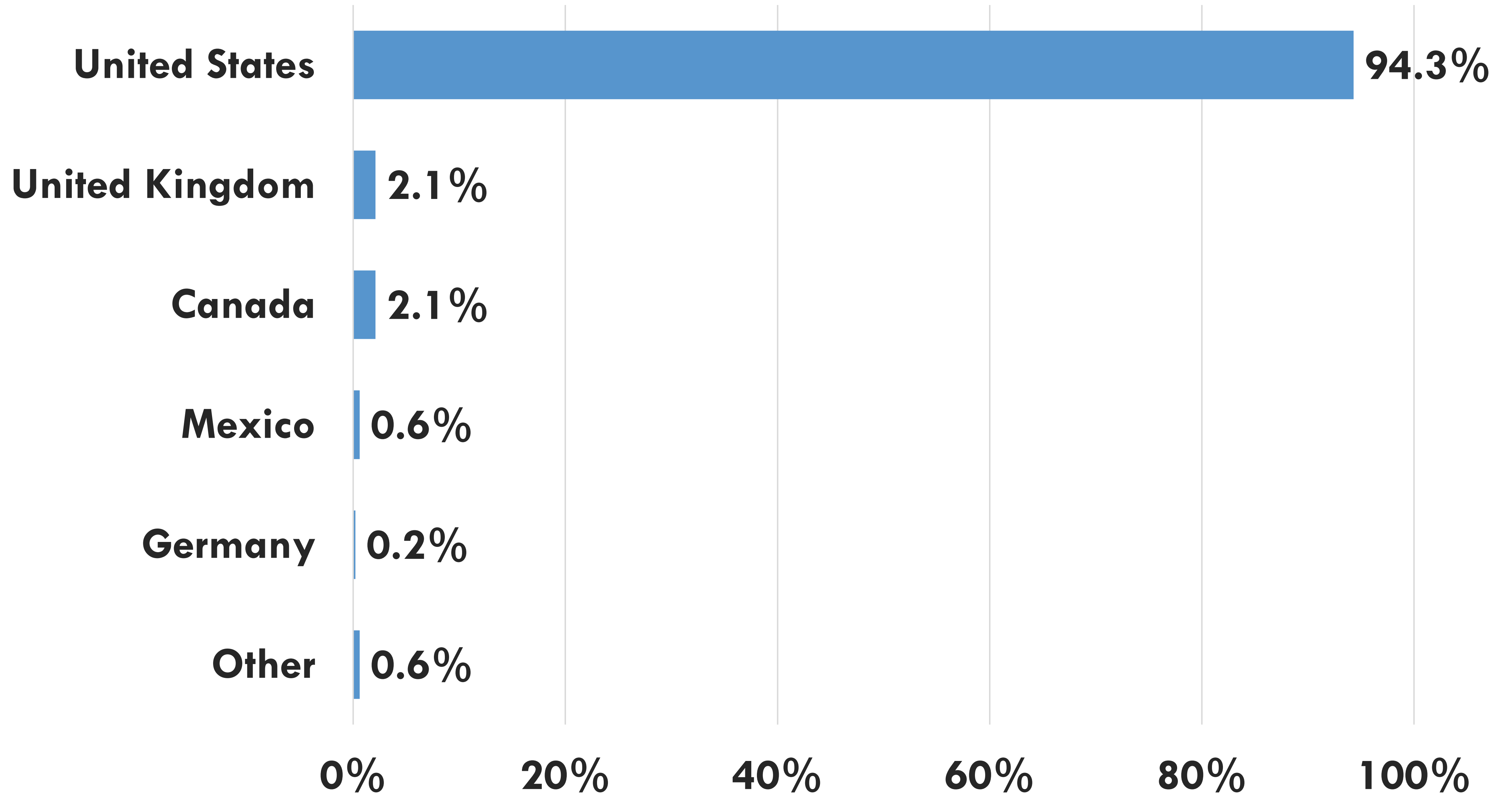
	Hotel	VFR	Day Trip
10—Certain to Return	89.6%	97.5%	91.4%
9	5.5%	1.2%	3.9%
8	2.3%	0.8%	2.7%
7	1.5%	0.5%	1.5%
6	0.0%	0.0%	0.3%
5	0.5%	0.1%	0.3%
4	0.0%	0.0%	0.0%
3	0.0%	0.0%	0.0%
2	0.3%	0.0%	0.0%
1—Definitely WILL NOT Return	0.3%	0.0%	0.0%
Mean Score	**9.8**	**10.0**	**9.8**
Sample Size:	**316**	**323**	**406**

Q1 2022
Point of Origin & Demographic Profile

POINT OF ORIGIN: COUNTRY

Compared to Q1 2021, St. Pete/Clearwater saw an increase in international visitors in Q1 2022 (5.7% vs. 0.4% in Q1 2021). The destination was primarily enjoyed by visitors from the United Kingdom (2.1%), Canada (2.1%), Mexico (0.6%), and Germany (0.2%). 94.3 percent of all visitors surveyed reside in the United States – down from 99.6% in Q1 2021..

Figure 29: Country of Origin



Question: In what country do you reside? Base: All Respondents.1,293 responses.

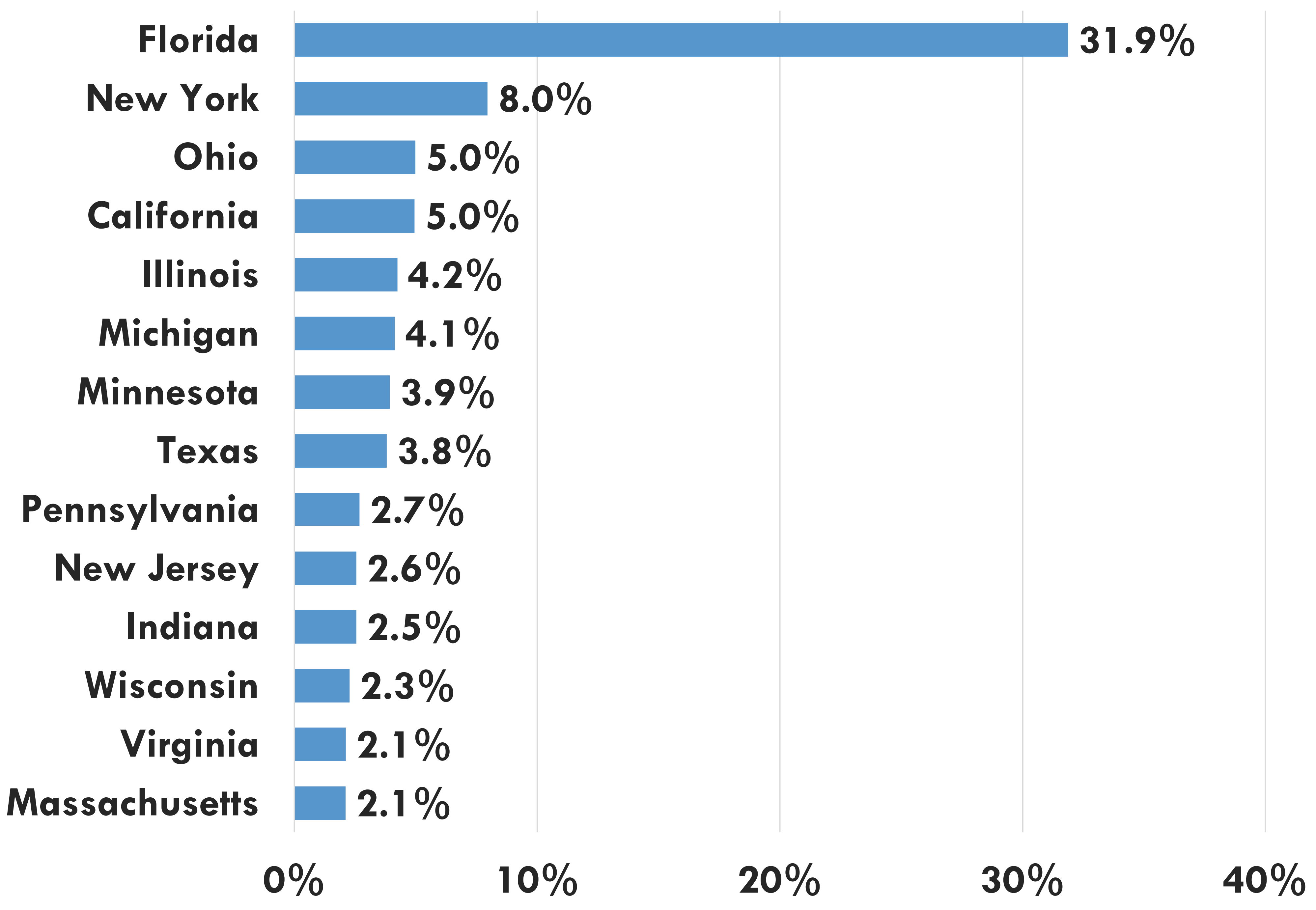
Detail by Traveler Segment

	Hotel	VFR	Day Trip
United States	96.2%	93.4%	93.8%
United Kingdom	0.5%	0.3%	3.5%
Canada	1.1%	3.7%	1.5%
Mexico	0.0%	1.1%	0.7%
Germany	0.3%	0.0%	0.3%
Other	1.7%	1.4%	0.1%
Sample Size:	**305**	**323**	**400**

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

Nearly a third of all domestic visitors surveyed in Q1 2022 reside within the state of Florida (31.9%), while 68.1% of domestic visitors were out of state residents (vs. 66.4% in Q1 2021). New York (8.0%), Ohio (5.0%), California (5.0%), Illinois (4.2%) and Michigan (4.1%) contributed the largest proportions of out-of-state visitors. Not surprisingly, day trippers were again the likeliest segment to reside within Florida (53.8%). Hotel guests and VFR were the segments most likely to be from out-of-state (95.7% and 93.1%, respectively), with VFRs also being the likeliest to be California residents (10.1%).

Figure 30: State of Origin



Question: What is your zip/postal code? Base: Domestic respondents. 1,115 responses.

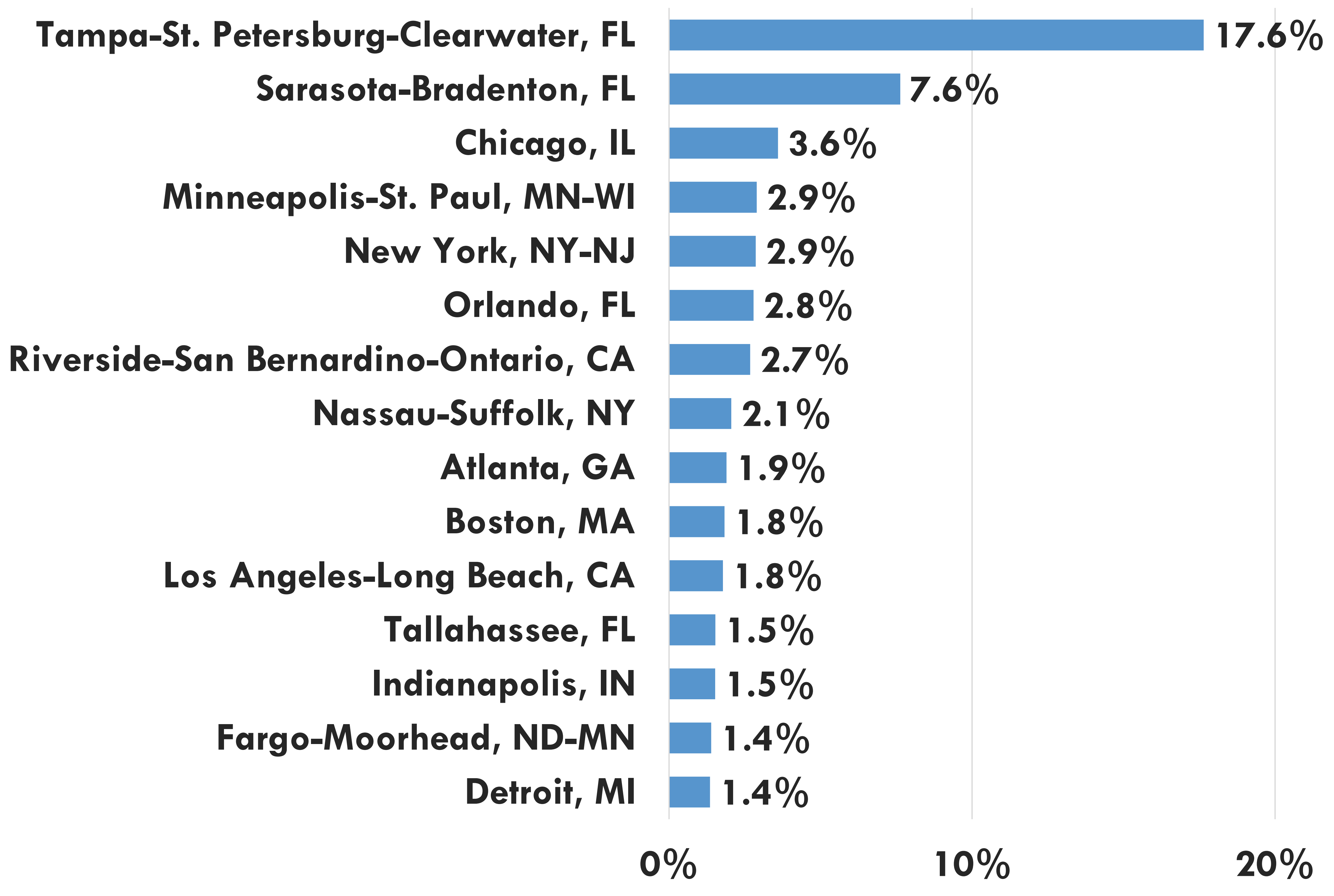
Detail by Traveler Segment

	Hotel	VFR	Day Trip
Florida	4.3%	6.9%	**53.8%**
New York	10.9%	11.8%	5.7%
Ohio	9.3%	6.5%	2.8%
California	3.5%	**10.1%**	4.0%
Illinois	6.6%	8.3%	1.4%
Michigan	7.1%	2.8%	2.5%
Minnesota	3.0%	1.9%	4.5%
Texas	4.9%	9.5%	2.1%
Pennsylvania	4.5%	1.3%	1.5%
New Jersey	3.9%	4.3%	1.6%
Indiana	1.4%	3.1%	2.0%
Wisconsin	4.7%	0.8%	1.7%
Virginia	4.2%	2.3%	1.4%
Massachusetts	1.6%	1.9%	2.1%
Sample Size:	**279**	**267**	**362**

POINT OF ORIGIN: MSA (DOMESTIC VISITORS)

Tampa (17.6%), Sarasota/Bradenton (7.6%) and Orlando (2.8%) were the top three Florida visitor markets. Out-of-state markets during the first quarter of 2022 included Chicago (3.6%), Minneapolis-St. Paul, MN-WI (2.9%), New York, NY-NJ (2.9%), Riverside-San Bernardino-Ontario, CA (2.7%) and Nassau-Suffolk, NY (2.3%).

Figure 31: MSA



Question: What is your zip/postal code? Base: Domestic respondents. 998 responses.

Detail by Traveler Segment

	Hotel	VFR	Day Trip
Tampa-St. Petersburg-Clearwater, FL	1.0%	0.1%	30.4%
Sarasota-Bradenton, FL	0.7%	0.4%	12.9%
Chicago, IL	6.7%	7.8%	0.8%
Minneapolis-St. Paul, MN-WI	2.6%	2.1%	2.7%
New York, NY-NJ	4.4%	6.4%	0.7%
Orlando, FL	1.0%	1.8%	3.8%
Riverside-San Bernardino-Ontario, CA	0.3%	5.5%	2.7%
Nassau-Suffolk, NY	2.2%	0.7%	2.5%
Atlanta, GA	4.5%	3.0%	0.9%
Boston, MA	0.3%	1.7%	2.2%
Los Angeles-Long Beach, CA	2.7%	3.8%	0.9%
Tallahassee, FL	0.0%	0.0%	2.6%
Indianapolis, IN	1.0%	1.2%	1.1%
Fargo-Moorhead, ND-MN	0.9%	0.0%	2.1%
Detroit, MI	3.7%	0.3%	0.4%
Sample Size:	**241**	**242**	**348**

DEMOGRAPHIC PROFILE

The following presents the demographic profile for all St. Pete/Clearwater area visitors surveyed in Q1 of 2022.

Average Age

51.1 years old

Gender*

Female: 63.8%

Male: 36.2%

Household Income

$104,401

Marital Status

Single: 27.0%

Married/partnered: 69.0%

Children under 18: 16.1%

Ethnicity

Caucasian – 81.4%

Black/African-American – 7.7%

Latino/Hispanic – 4.3%

Orientation

Heterosexual – 59.4%

LGBTQ – 3.6%

Other – 35.4%

**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 Q1 of 2022.

	Hotel	VFR	Day Trip
Female	58.8%	67.3%	63.1%
Male	41.0%	32.6%	36.9%
Mean Age	52.6	48.1	51.3
Single	15.7%	40.3%	29.4%
Married	80.1%	57.5%	66.3%
Has Children	17.7%	19.0%	14.9%
Annual Household Income	$115,101	$97,670	$97,806

	Hotel	VFR	Day Trip
Caucasian	85.3%	66.3%	82.8%
Black/African-American	5.4%	19.0%	6.1%
Latino/Hispanic	2.9%	5.4%	4.5%
Asian/Pacific Islander	0.7%	2.3%	4.3%
American Indian/Alaska Native	3.7%	6.3%	1.4%
Other	0.7%	0.5%	0.1%
Heterosexual	64.1%	43.2%	57.6%
LGBTQ	1.0%	4.9%	4.3%