Destination Analysts

Visit St. Petersburg/Clearwater

VISITOR PROFILE STUDY

Report of Findings

June 2018

Research prepared for Visit St. Petersburg/Clearwater by Destination Analysts, Inc.

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Overview & Methodology

This report presents interim monthly findings of a comprehensive visitor profile development study conducted by Destination Analysts, Inc. on behalf of Visit St. Petersburg/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 preliminary report presents the top-line survey data collected from these surveys in June 2018.

Note that data presented in this interim report is unweighted. Once more data has been collected, we will develop appropriate weighting techniques so the final statistics emerging from the project will accurately reflect the overall population of St. Pete/Clearwater area visitors.

In total, 401 completed surveys from Pinellas County visitors were collected.

Research Objectives

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

- Detailed trip characteristics (i.e. 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. Petersburg/Clearwater area
- Evaluation of St. Petersburg/Clearwater brand attributes
- Detailed visitor spending estimates
- Travel planning resources used by St. Petersburg/Clearwater area visitors
- Visitor satisfaction
- Visitor demographics

Images from the Wyndham Grand Hotel and Chihuly Collection, June 2018.

Visitor Intercept Overview

Destination Analysts' survey team worked at locations around the St. Petersburg/Clearwater area to randomly select and interview visitors. The questionnaire was administered to persons residing outside Pinellas County at the following locations and events:

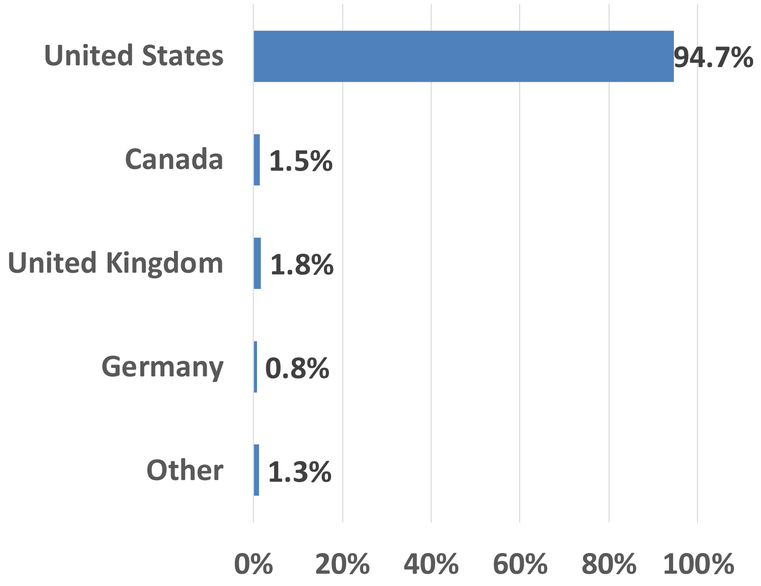
- Clearwater Beach
- Clearwater Marine Aquarium
- Chihuly Collection
- John's Pass Village & Boardwalk
- Pier 60
- Sandpearl Resort
- Shephard's Resort
- St. Petersburg-Clearwater International Airport
- St. Petersburg Saturday Morning Market
- Straub Park
- The Dali Museum
- Wyndham Grand Clearwater Beach

Destination Analysts' research staff interviewing visitors at John's Pass Boardwalk, June 2018.

Point of Origin & Demographic Profile

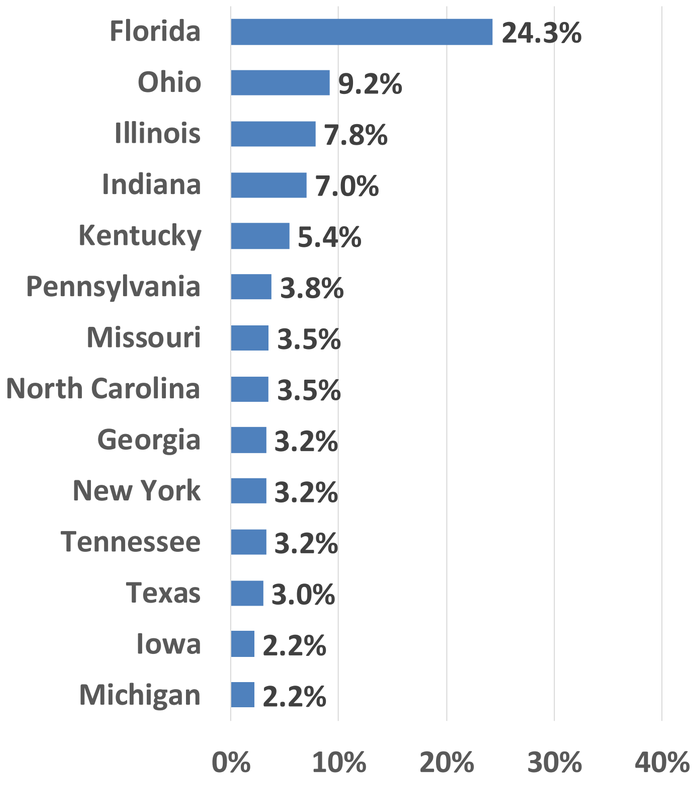
Point Of Origin

Chart: Country of Origin



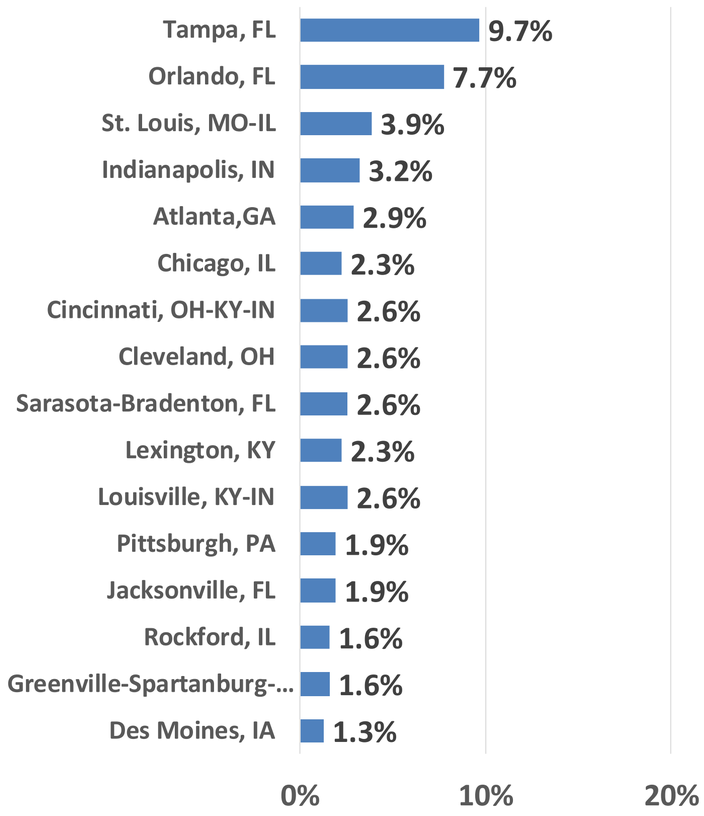
Question: In what country do you reside?
Base: All Respondents. 398 responses.

Chart: State of Origin



Question: What is your zip/postal code?
Base: Domestic respondents. 370 responses.

Chart: MSA of Origin



Question: What is your zip/postal code?
Base: Domestic respondents. 310 responses.

Demographic Profile

The following presents the demographic profile for all respondents surveyed in June 2018.

Mean age – 50.0

Female – 50.6%
Male – 48.6%

Mean household income – $89,990

Married/partnered – 71.0%
Has children under 18 – 28.3%

Ethnicity
Caucasian – 82.5%
Latino/Hispanic – 4.7%
Black/African-American – 5.7%
Asian/Pacific Islander – 2.7%

Heterosexual – 87.6%
LGBTQ – 2.3%

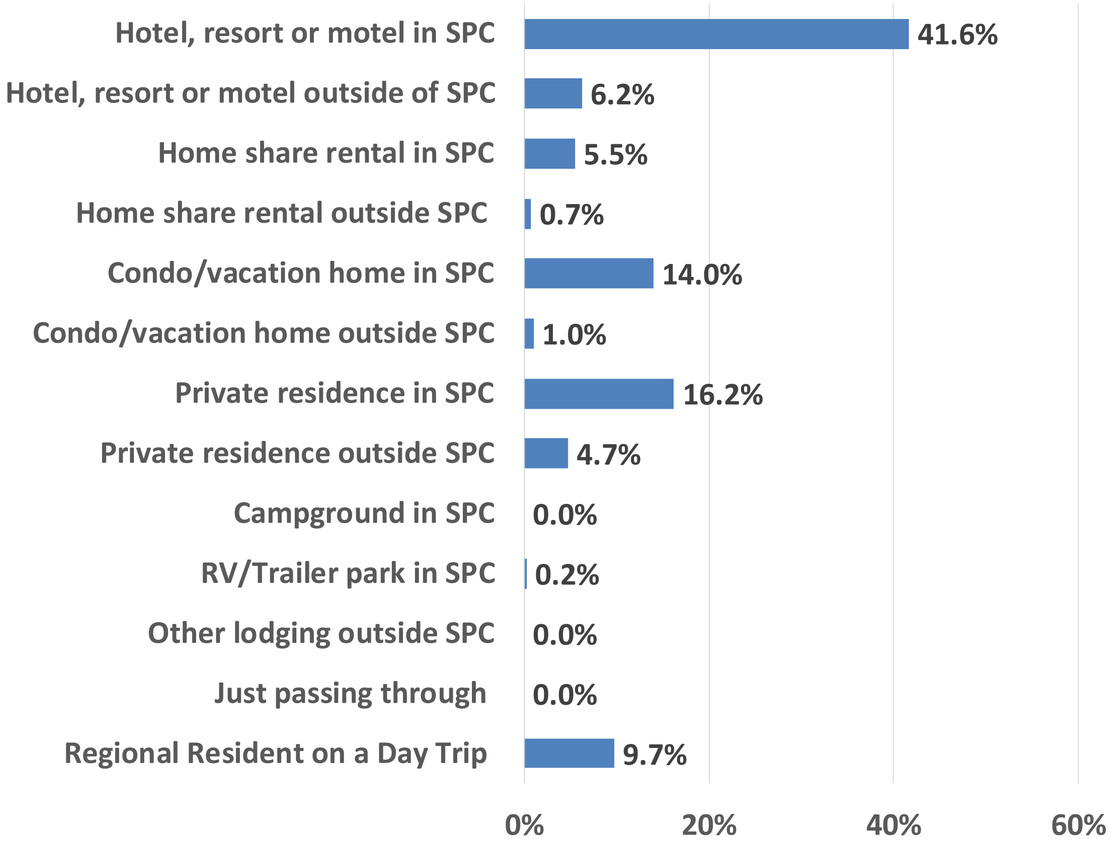
Top 10 Visitor Insights June 2018

1. In June 2018, the top domestic visitor markets represented were **Tampa, FL (9.7%)**, **Orlando, FL (7.7%)**, and **St. Louis, MD-IL (3.9%)**.
2. In total, **5.3 percent** of survey respondents were **international** residents, with **Canada (1.5%)** being the top international market.
3. Approximately three-quarters of domestic survey respondents were **out-of-state** residents **(75.7%)**.
4. One-in-five visitors **(27.5%)** were in the St. Petersburg/Clearwater area for the **first time** (vs. 30.4% in June 2017).
5. The typical travel party included **3.2 people**. In total, **36.8 percent** of travel groups surveyed **included children under 18.**
6. On average, June 2018 visitors stayed **4.9 days** in the St. Pete/Clearwater area (vs. 5.0 in June 2017), spending an average of **$96.79** per person, per day (vs. $147.06 in June 2017).
7. A majority of visitors arrived in the area by car, using either **a personal automobile (51.5%)** or **rental car (36.0%).** Of the visitors who arrived into the area by airplane, 49.0 percent flew into the St. Petersburg-Clearwater International Airport, while 32.7 percent flew into Tampa.
8. Nearly all visitors surveyed (99.4%) said they were **"satisfied" (9.5%)** or **"very satisfied" (89.9%)** with their experience in the St. Pete/Clearwater area. Respondents rated their **likelihood to recommend** the area to other travelers an average of **9.6 out of 10.**
9. Visitors rated their **likelihood to return** to St. Pete/Clearwater an average of **9.2 out of 10**.
10. In total, **36.8 percent** of June 2018 visitors surveyed **recalled reading, seeing or hearing paid or earned media** for the St. Pete/Clearwater area in the past six months.

Visitor Trip Details

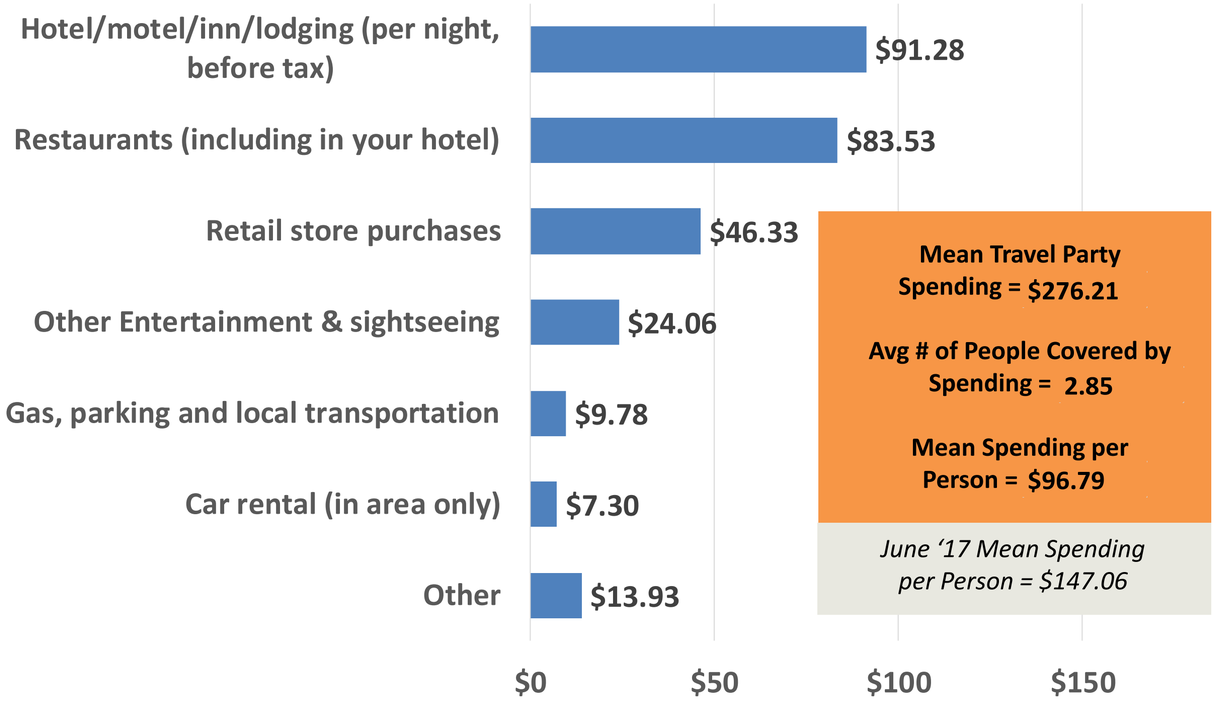
Lodging Type / Daily Spending In-Market

Chart: Type of Lodging



Question: Where are you staying overnight on this trip to the St. Pete/Clearwater area? (Select one)
Base: All Respondents. 401 responses.

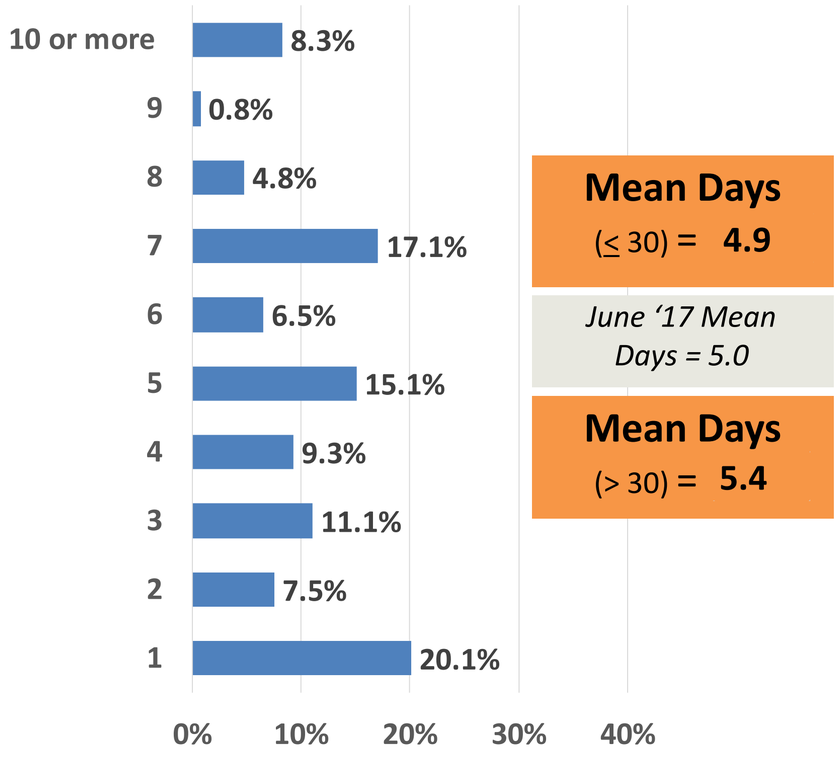
Chart: Per Day Travel Party Spending



Question: Approximately how much will you spend on each of the following while in the St. Petersburg/Clearwater area? Base: All Respondents. 352 responses.

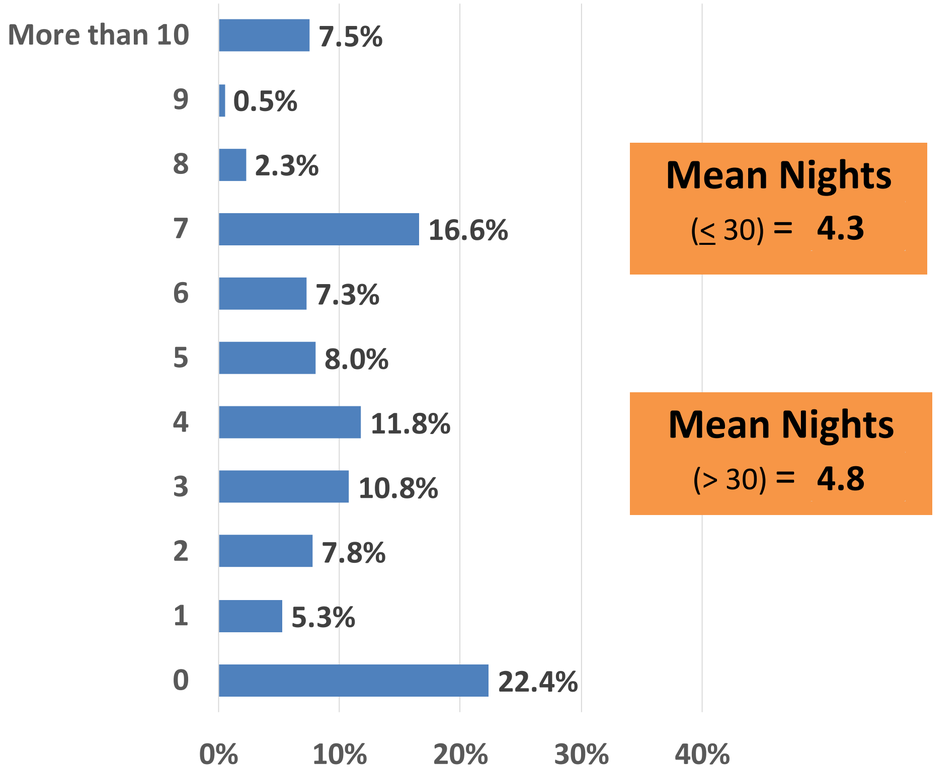
Days & Nights in St. Pete/Clearwater

Chart: Days in Market



Question: How many total days and nights did you, or will you, stay in the St. Petersburg/Clearwater area on this trip?
Base: All Respondents. 398 responses.

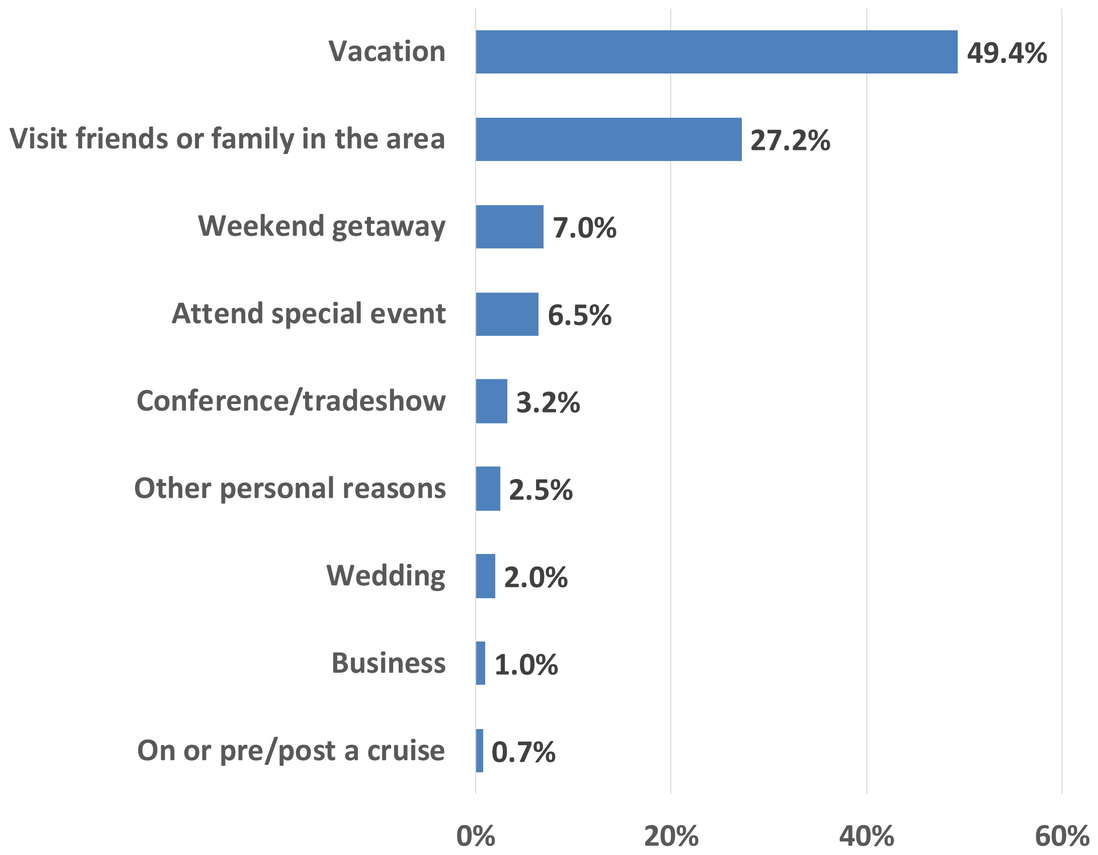
Chart: Nights in Market



Question: How many total days and nights did you, or will you, stay in the St. Petersburg/Clearwater area on this trip?
Base: All Respondents. 398 responses.

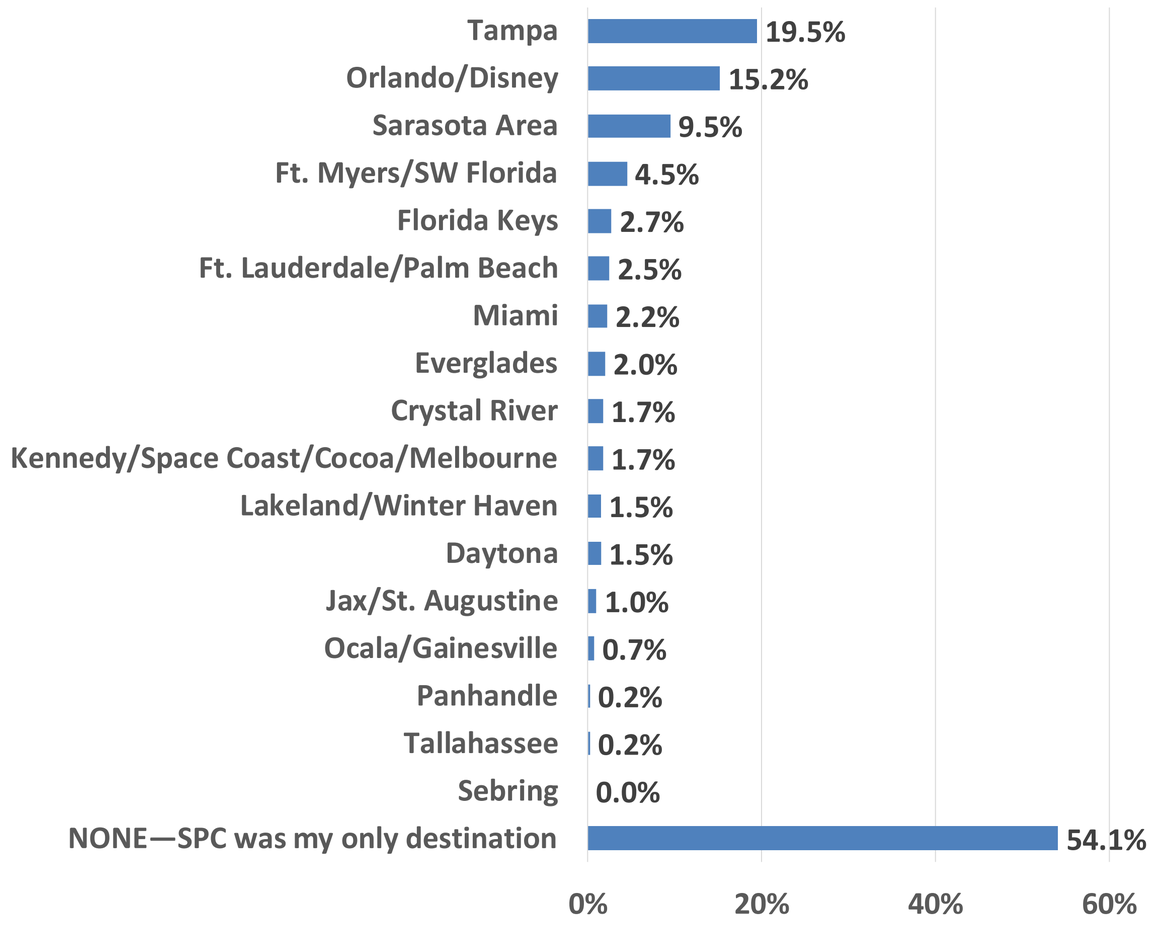
Primary Reason for Visit / Other Destinations Visited

Chart: Primary Reason for Visit



Question: What is your primary reason for visiting the St. Pete/Clearwater Area? (Select one)
Base: All Respondents. 401 responses.

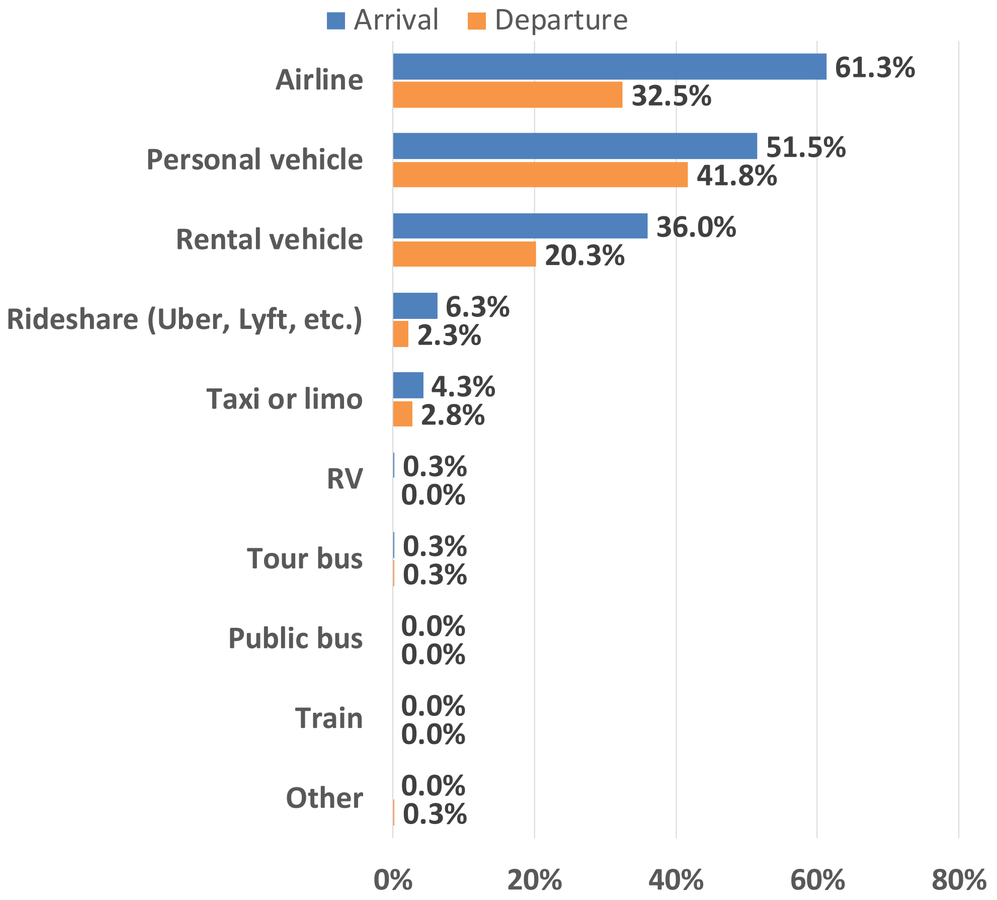
Chart: Other Destinations Visited on St. Pete/Clearwater Trip



Question: Which of these other destinations did you visit while on this trip? (Show list. Select all that apply) Base: All Respondents. 401 responses.

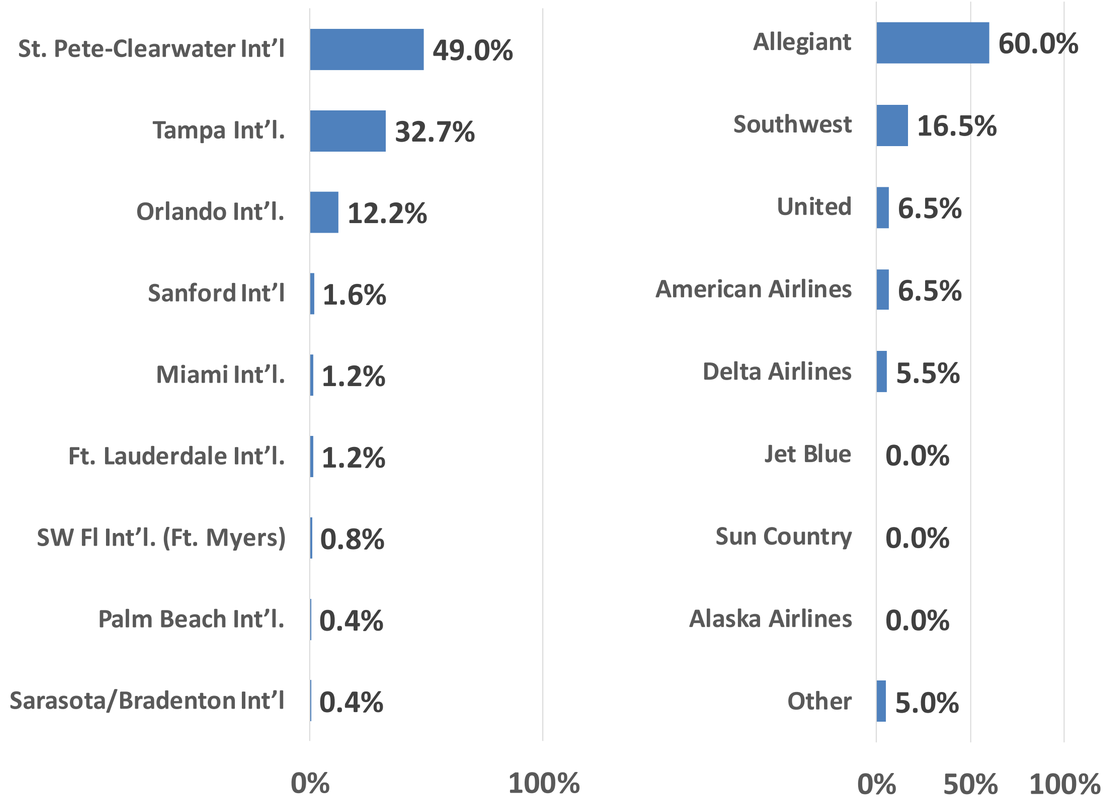
Method of Arrival & Departure / Arrival Airport & Airline

Chart: Method of Arrival and Departure



Question: How did you arrive into the St. Pete/Clearwater area and how will you leave? (Select all that apply) Base: All Respondents. 400 responses.

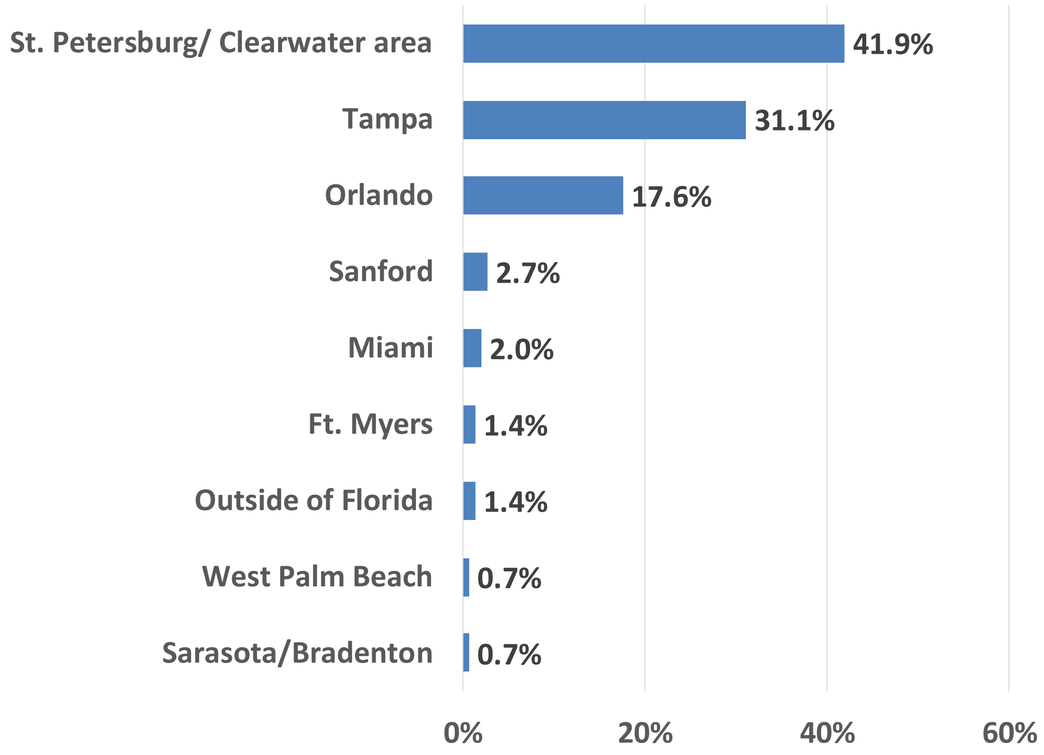
Charts: Airport of Arrival and Airline Used



Question: At which airport did you arrive into the area? Which airline did you use?
Base: Respondents who arrived by Airline. 245 responses.

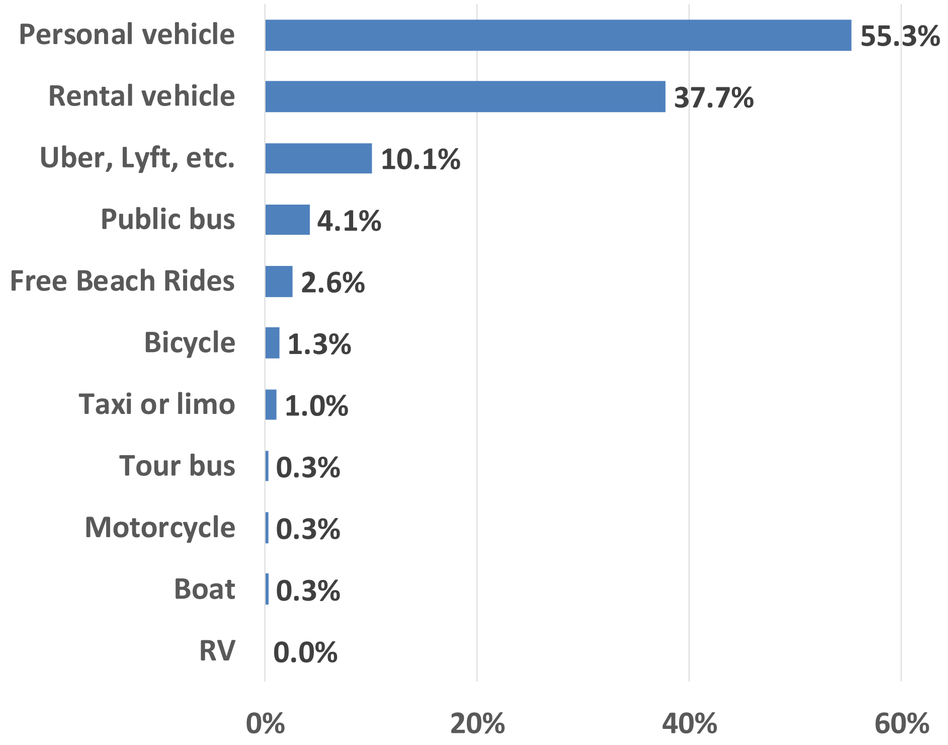
Rental Vehicle Pick-Up City / Transportation Used In-Market

Chart: 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. 148 responses.

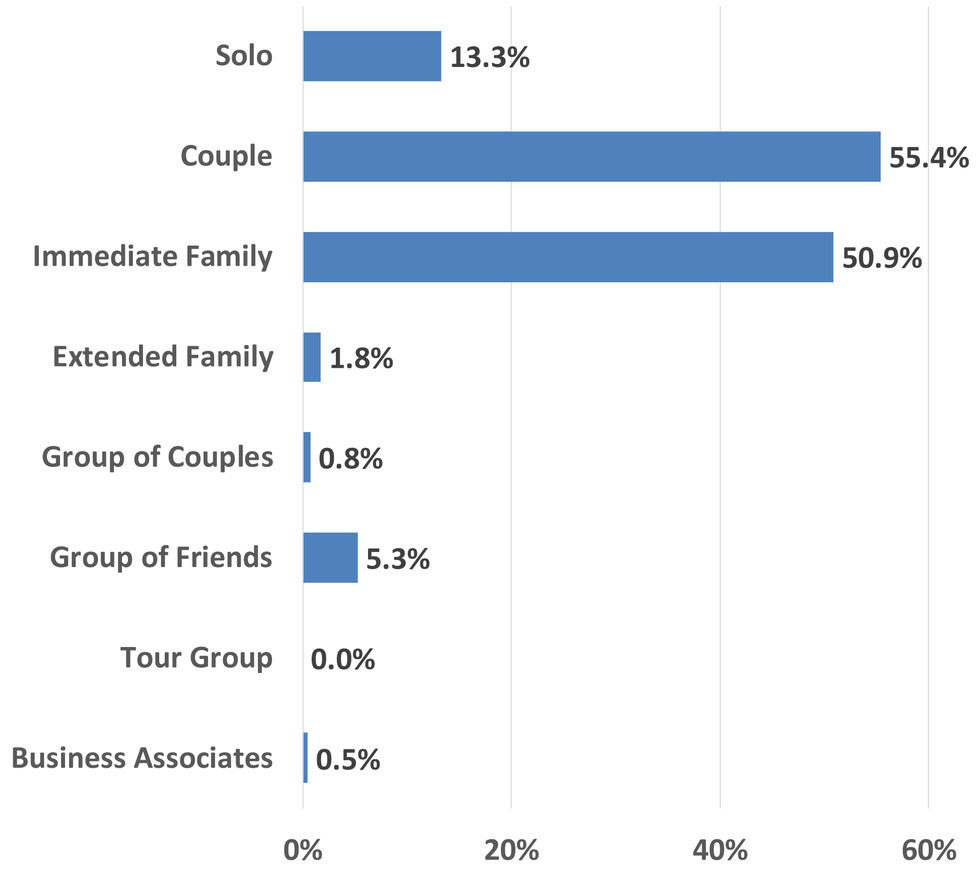
Chart: Transportation Used In-Market



Question: Which modes of transportation did you, or will you, use while in the St. Petersburg/ Clearwater area? (Select all that apply) Base: All Respondents. 387 responses.

Travel Party Composition / Travel Party Size

Chart: Travel Party Composition



Question: Which best describes your travel group on this trip? Are you…? (Select all that apply)
Base: All Respondents. 399 responses.

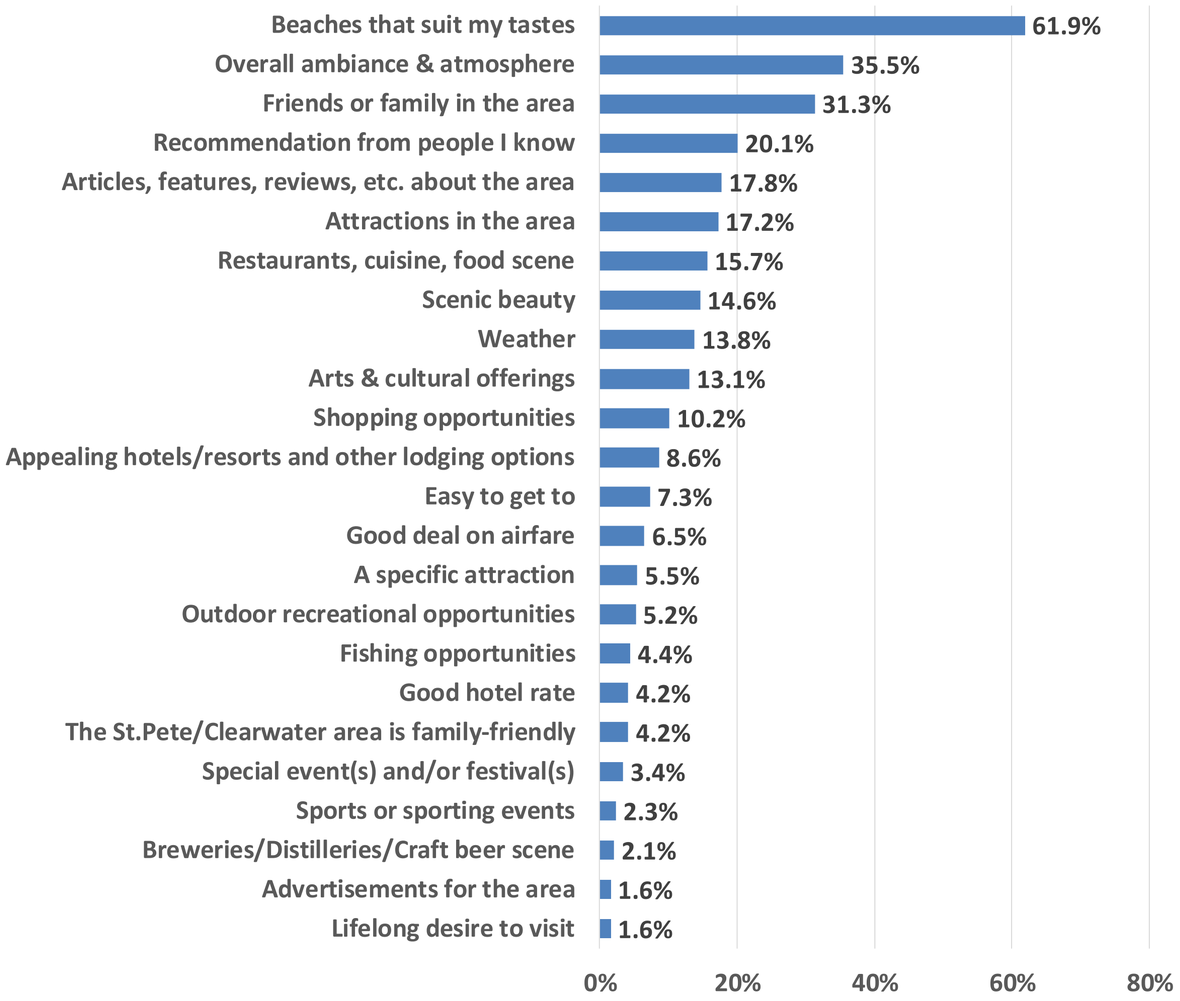
Chart: Travel Party Size

	Mean
Male adults (18 yrs. +)	1.07
Female adults (18 yrs. +)	1.38
Male children (0 to 17 yrs.)	0.34
Female children (0 to 17 yrs.)	0.36
Average Travel Party Size	**3.2**
Percent with children in party	**36.8%**

Question: How many people of each type are in your immediate travel party, including yourself?
Base: All Respondents. 399 responses.

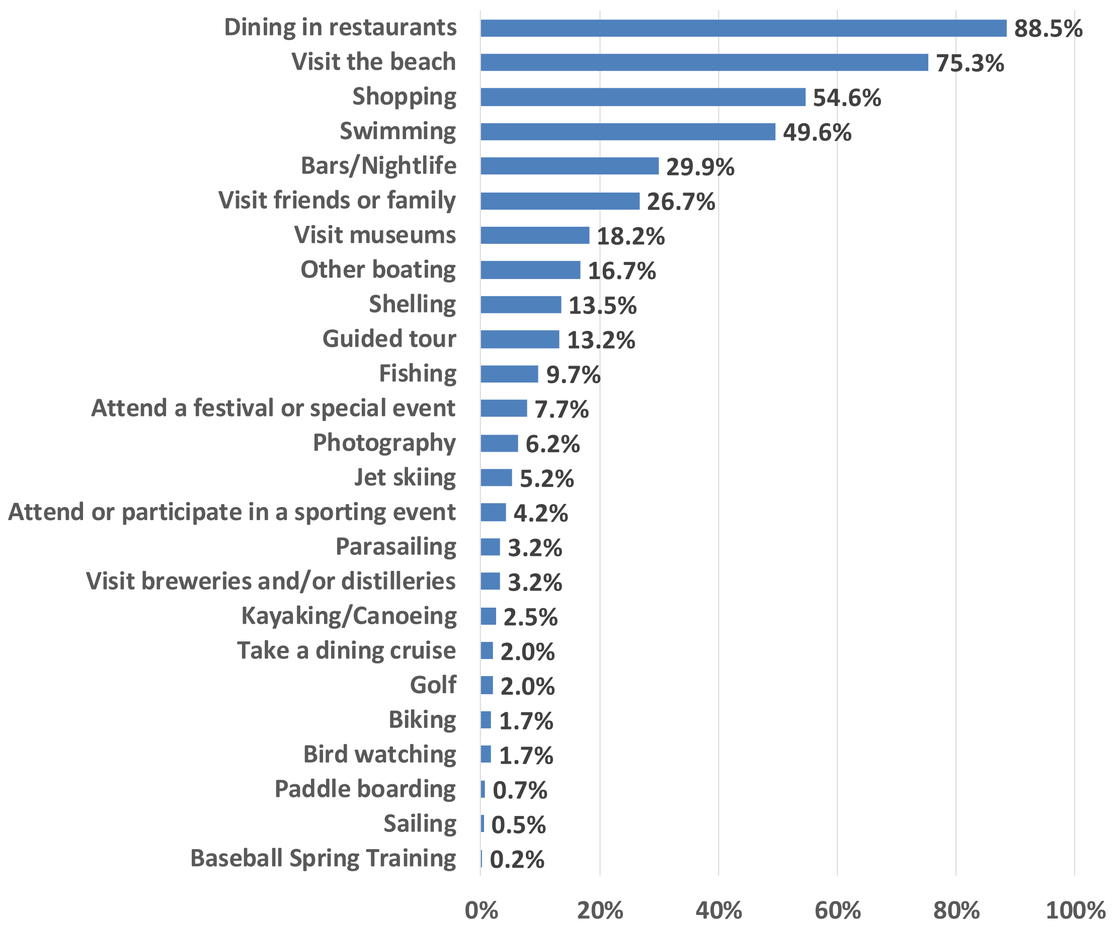
Important Factors to Destination Decision / Trip Activities

Chart: Important to Decision to Visit



Question: Which of the following were IMPORTANT to your decision to take this trip to St. Petersburg/Clearwater area? (Select all that apply) Base: All Respondents. 383 responses.

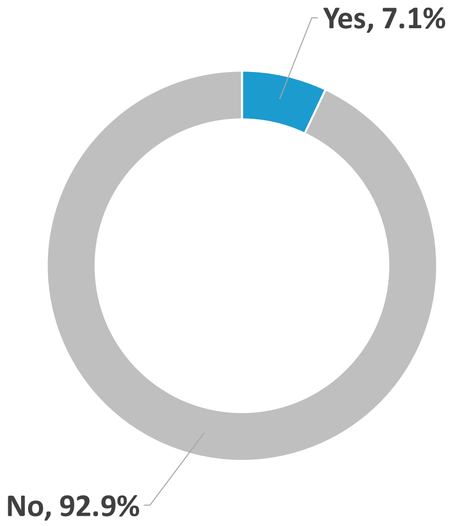
Chart: Trip Activities



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. 401 responses.

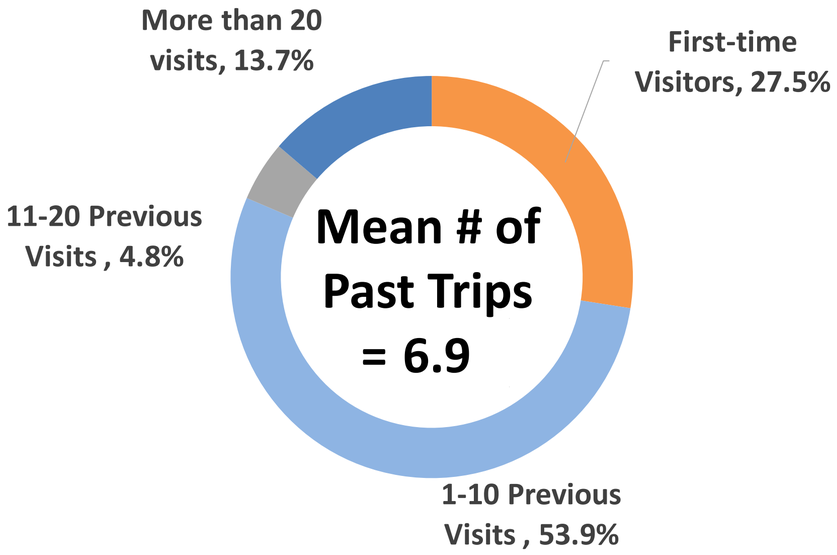
First-Time Visit to Florida / Previous Visitation to St. Pete/Clearwater

Chart: First Time Visitors to Florida



Question: Is this your first visit to Florida?
Base: All Respondents. 397 responses.

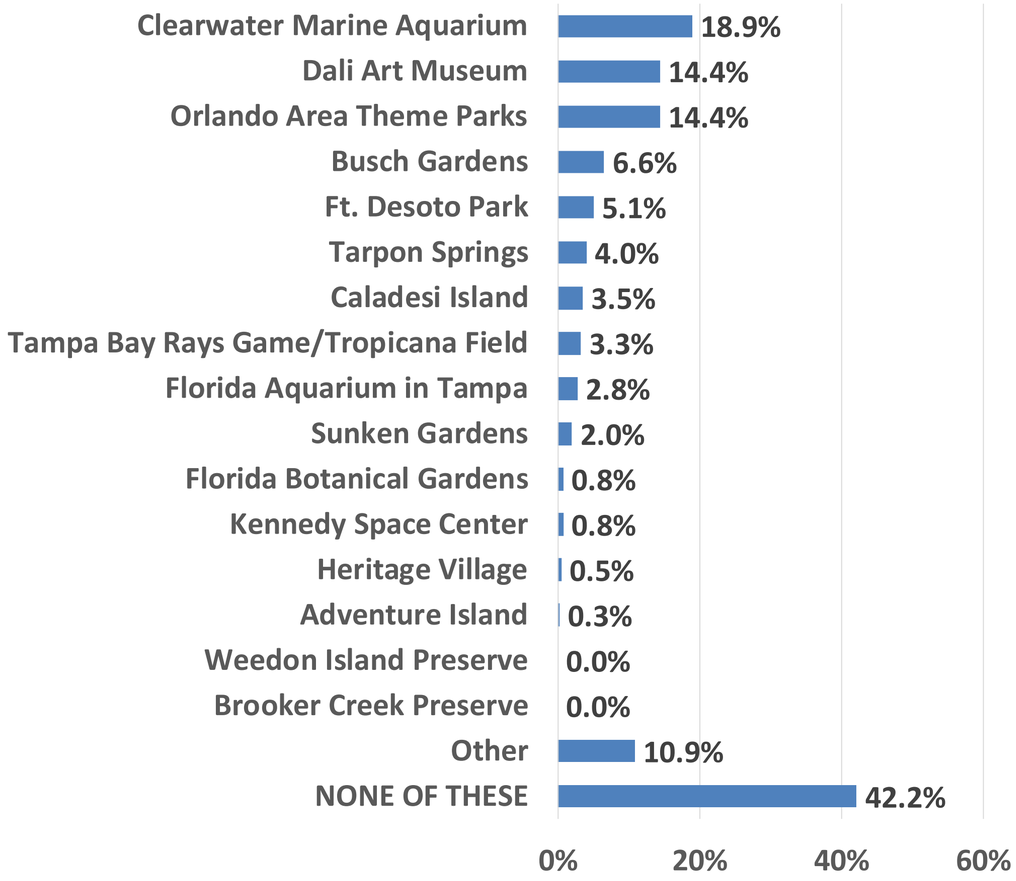
Chart: Previous Visitation to the St. Pete/Clearwater Area



Question: Prior to this visit, how many times have you been to the St. Petersburg/Clearwater area?
Base: All Respondents. 393 responses.

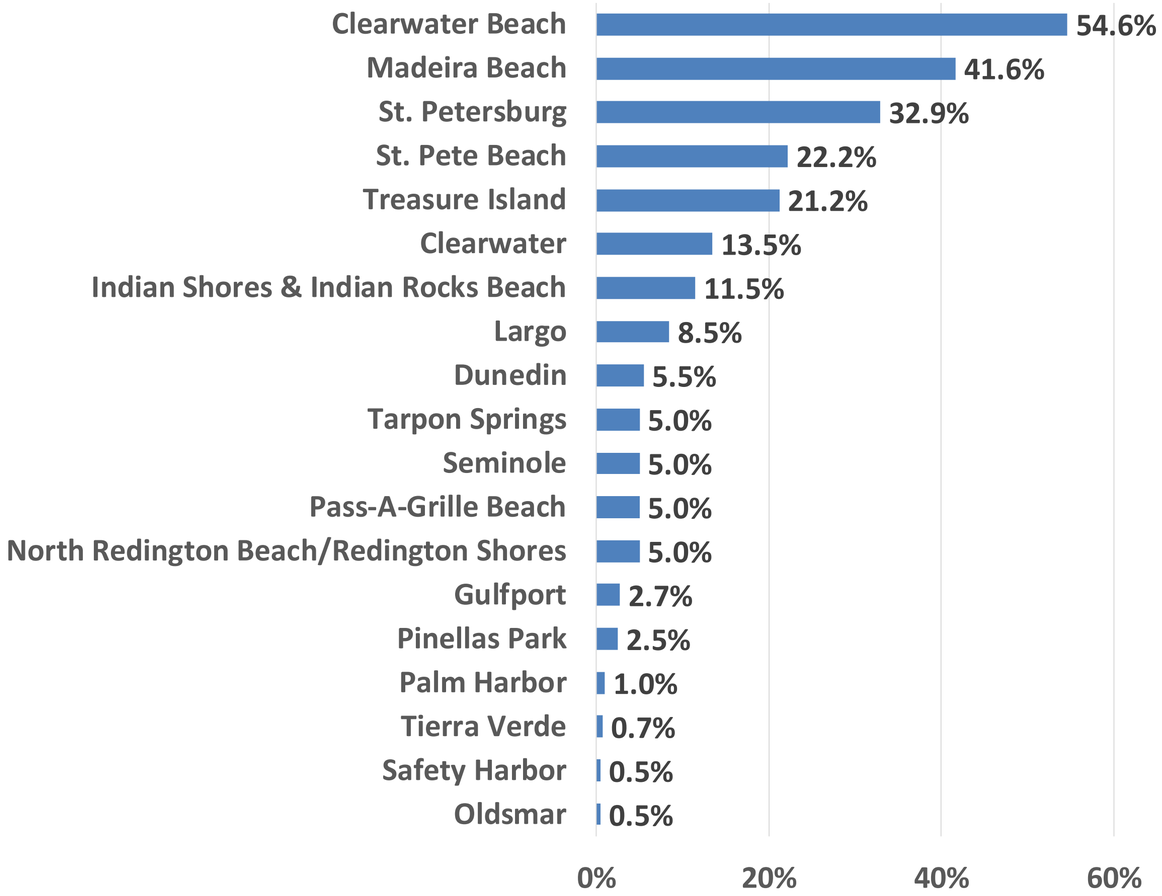
Attractions Visited / Communities Visited

Chart: Attractions Visited



Question: Which of these attractions did you (or will you) visit while on this trip? (Select all that apply) Base: All Respondents. 396 responses.

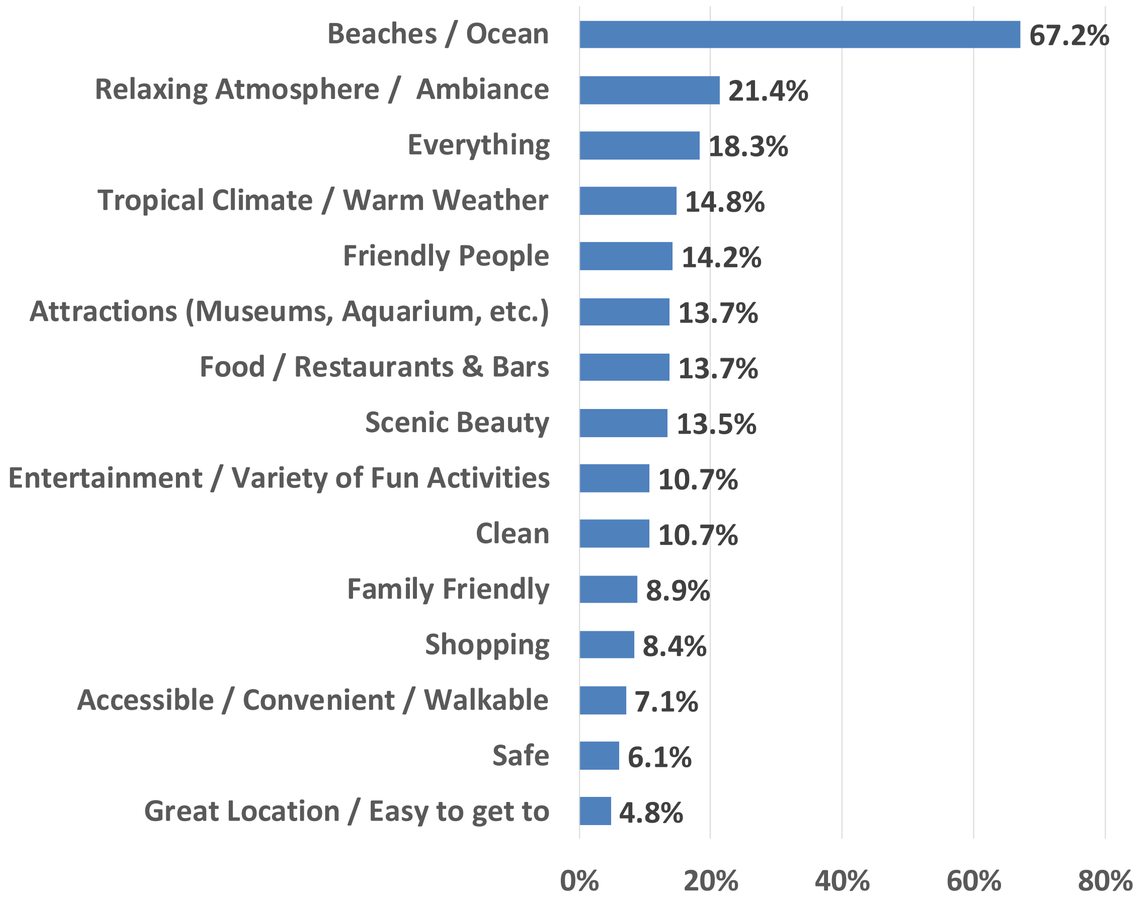
Chart: Communities Visited



Question: Which of the following communities in the St. Pete/Clearwater area did you visit? (Show list. Select all that apply) Base: All Respondents. 401 responses.

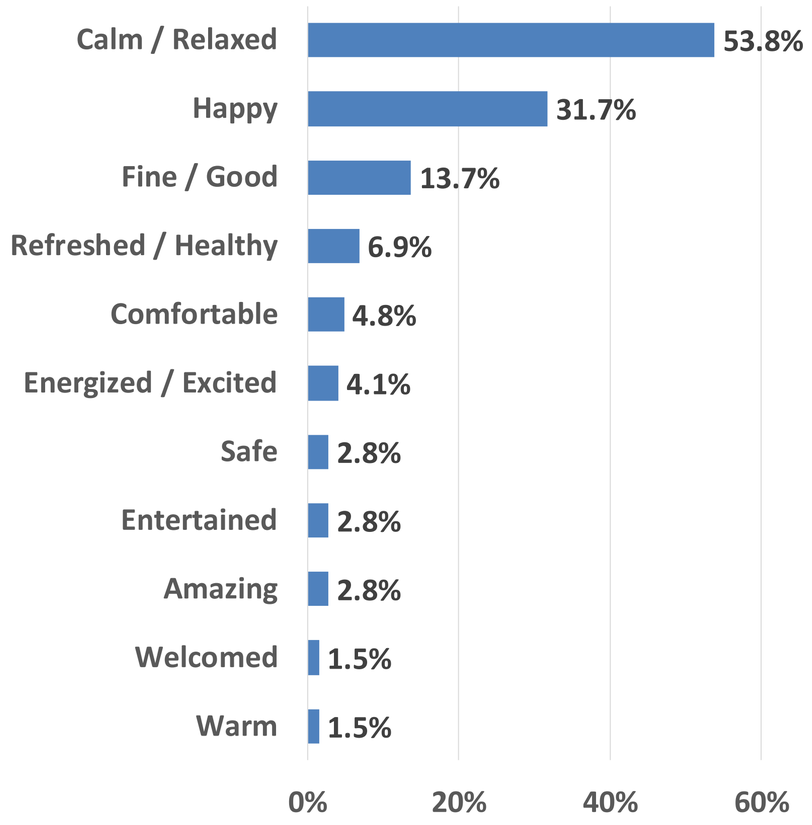
Most Liked Aspect / Feelings in St. Pete-Clearwater

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



Question: What do you like most about the St. Petersburg/Clearwater area?
Base: All Respondents. 393 responses.

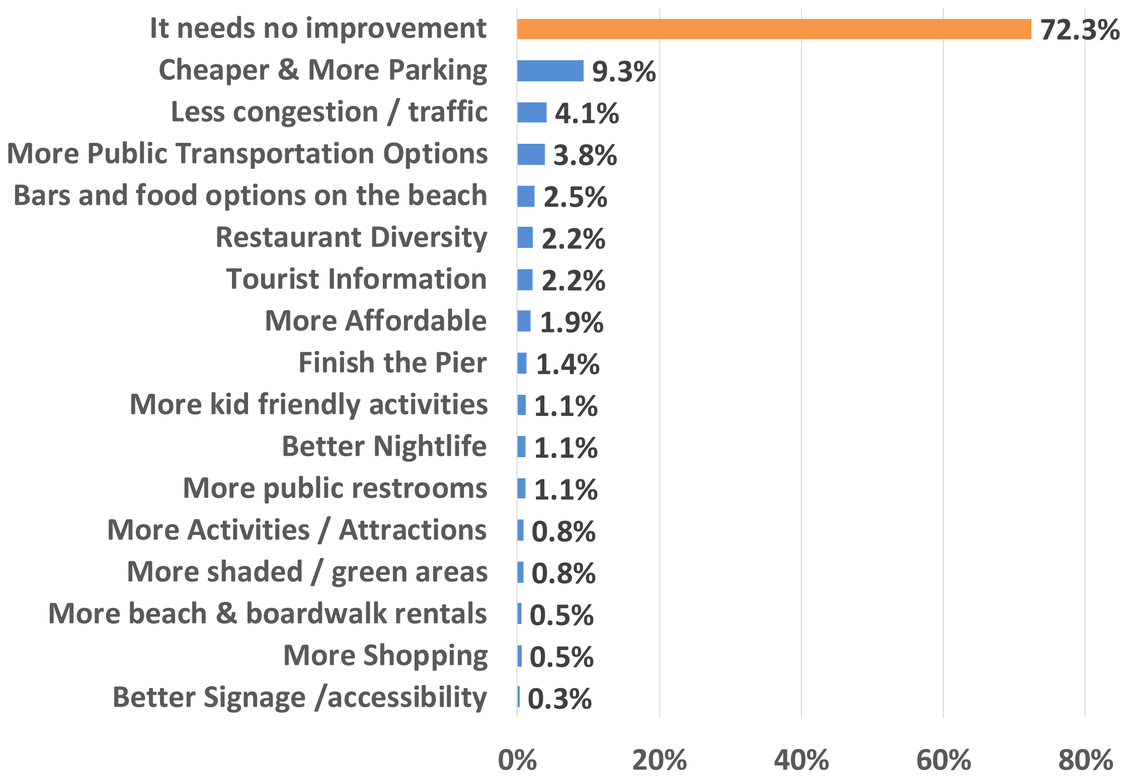
Chart: Feelings in St. Pete/Clearwater Area (Unaided)



Question: What one word or phrase best describes how you feel in the St. Petersburg/Clearwater area? Base: Respondents. 394 responses.

Attractions or Services that Would Enhance the Destination Experience

Chart: Additional Attractions or Services (Unaided)



Question: In your opinion, what services or additional attractions would most enhance your experience in the St. Petersburg/Clearwater Area? Base: All Respondents. 365 responses.

Travel Planning
And Satisfaction Metrics

When Decision to Visit was Made / Travel Planning Resources Used

Chart: Average Time Between Decision to Visit and Arrival

70.9 Days in Advance

Question: Approximately how many days before you arrived did you make the decision to visit the St. Petersburg/Clearwater area for this trip? Base: All Respondents. 401 responses.

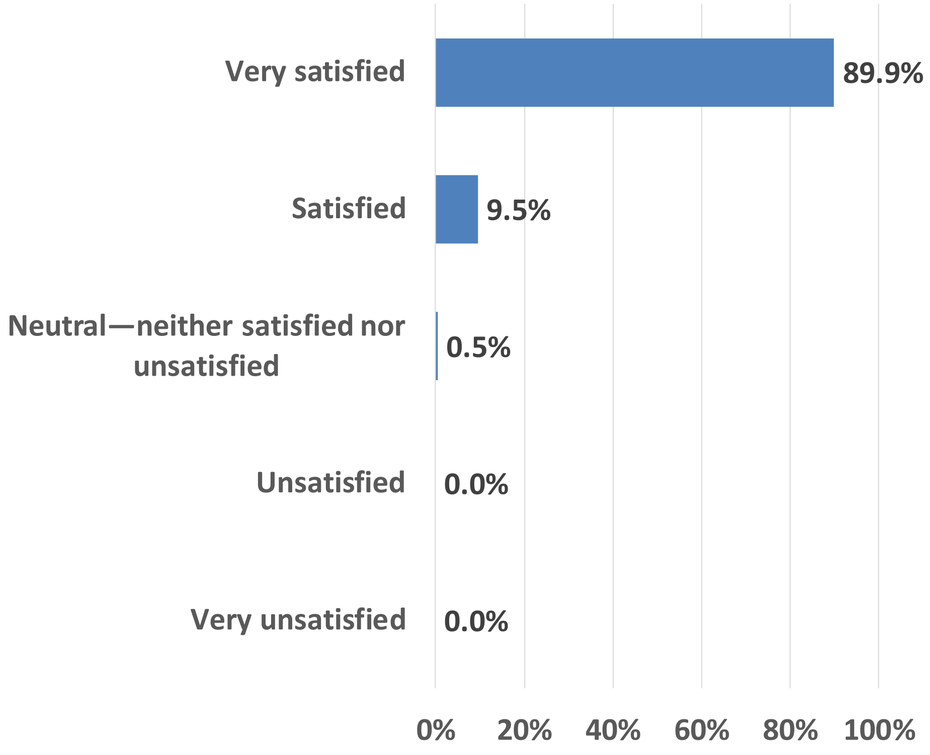
Chart: Resources Used before Arrival and While In Market

	Used Before Arrival	Used In Market
User-generated content/Review websites, such as Yelp and TripAdvisor	64.1%	43.4%
Online travel agencies (Expedia, Travelocity, etc.)	48.4%	1.0%
Opinions of friends or relatives	33.4%	32.2%
Social Media content	18.7%	19.5%
YouTube or other online videos	4.5%	4.7%
Official St. Petersburg/Clearwater area tourism website, www.VisitStPeteClearwater.com	**4.0%**	**3.7%**
Travel agency (traditional, offline)	3.7%	1.0%
Television programming	2.5%	1.0%
Travel guides, brochures	2.0%	19.7%
Newspaper travel section	1.7%	1.0%
Official Visit St. Pete/Clearwater Destination Magazine	**1.5%**	**0.7%**
Lifestyle or travel magazines	1.2%	3.2%
Radio programming	0.7%	0.2%

Question: Which of the following resources did you use to plan your trip to the St. Petersburg/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. 401 responses.

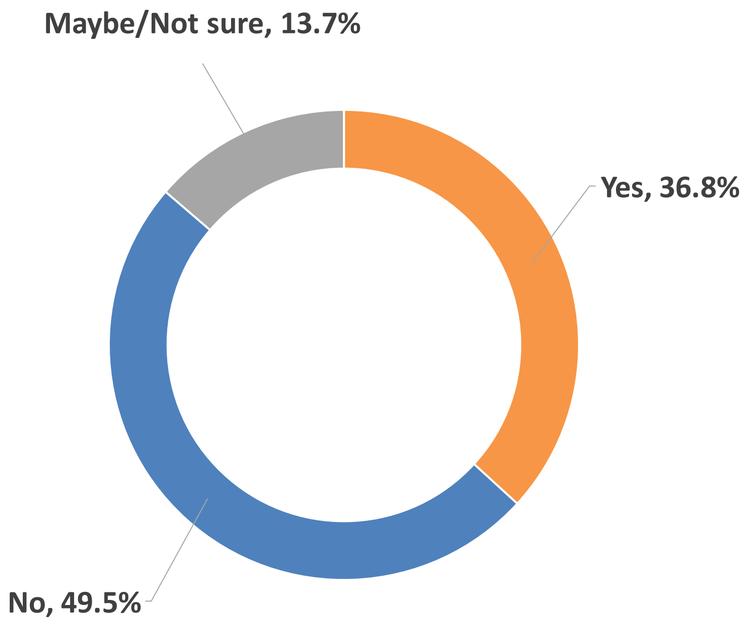
Experience Satisfaction / Earned & Paid Media Recall

Chart: Overall Satisfaction



Question: How satisfied are you with your experience in the St. Petersburg/Clearwater area on this trip? (Select one) Base: All Respondents. 398 responses.

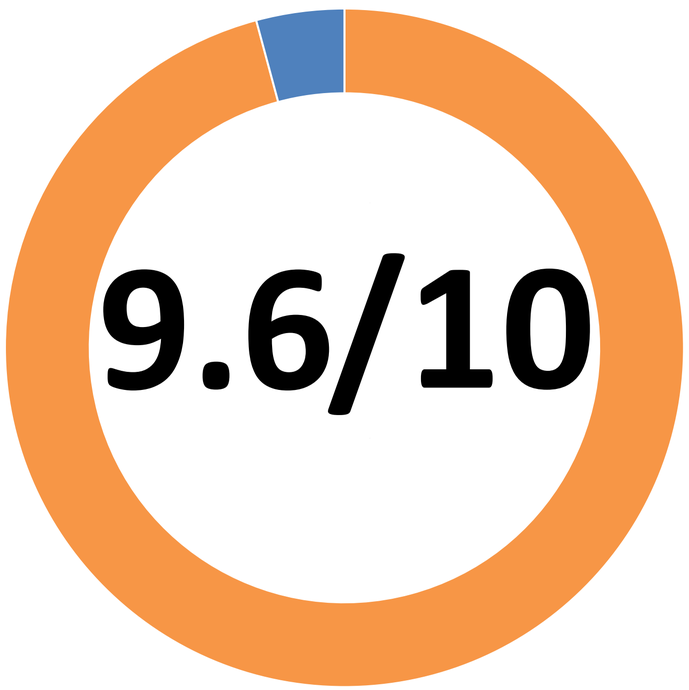
Chart: Media Recall



Question: In the last six months, have you seen, read, or heard any travel stories, advertising, or promotions for the St. Petersburg/Clearwater area?
Base: All Respondents. 394 responses.

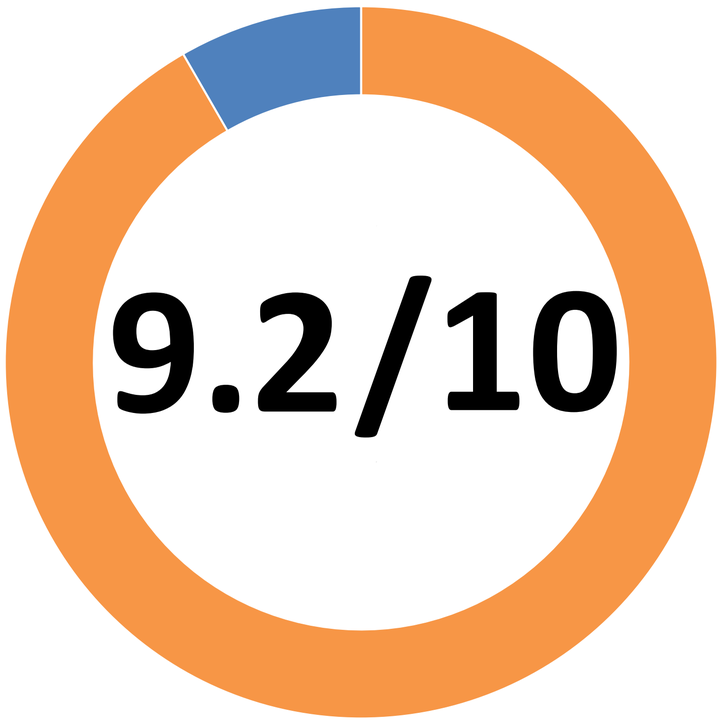
Likelihood to Recommend / Likelihood to Return

Chart: Likelihood to Recommend St. Pete/Clearwater Area



Question: How likely are you to recommend the St. Petersburg/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. 394 responses.

Chart: Likelihood to Return to St. Pete/Clearwater Area



Question: How likely are you to return to the St. Petersburg/Clearwater area? Please use a 10-point scale where 1 represents "Definitely will NOT return" and 10 represents "Certain to return." Base: All Respondents. 394 responses.