This online report presents interim findings of a comprehensive visitor profile development study conducted by Destination Analysts, Inc. on behalf of Visit St. Pete/Clearwater. The data presented here comes from an in-person intercept survey of St. Pete/Clearwater area visitors at locations throughout the destination. To be considered a visitor respondents had to reside outside of Pinellas County. This online report presents the top-line survey data collected from October 2017 onward and collection is still ongoing.

Data presented within this report is weighted to accurately reflect the overall population of St. Pete/Clearwater area visitors. The total number of completed surveys from Pinellas County visitors collected is 443 for April 2022.
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 and events:

- 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
- TradeWinds Island Grand
- The James Museum
- Wyndham Grand Clearwater Beach
Research Objectives

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

• Detailed trip characteristics
  (i.e. the reason for visiting the area, length of stay, place of stay, etc.)

• Travel party composition

• Activities & attractions visited in the St. Pete/Clearwater area

• Evaluation of St. Pete/Clearwater brand attributes

• Detailed visitor spending estimates

• Travel planning resources used by St. Pete/Clearwater area visitors

• Visitor satisfaction

• Visitor demographics
KEY THINGS TO KNOW
**VISIT ST. PETE/CLEARWATER** April 2022

### Average Time Between Decision to Visit & Arrival

- **Apr-19**: 63.6
- **Apr-21**: 57.0
- **Apr-22**: 69.7

### Travel Party Size

- **Apr-22**: 2.8
- **Apr-19**: 2.6
- **Apr-19**: 2.7

### Average Days & Nights

- **Days**:
  - **Apr-19**: 2.8
  - **Apr-21**: 3.1
  - **Apr-22**: 3.2
- **Nights**:
  - **Apr-19**: 2.1
  - **Apr-21**: 2.3
  - **Apr-22**: 2.3

### Percent Staying Overnight

- **Apr-19**: 41.7%
- **Apr-21**: 37.5%
- **Apr-22**: 43.9%

### Generations

- **Boomer or older**
  - **Apr-19**: 46.8%
  - **Apr-21**: 39.1%
  - **Apr-22**: 36.7%
  - **April-19**: 37.4%
  - **April-21**: 46.7%
  - **April-22**: 44.2%

### Average Age

- **Apr-19**: 48.8
- **Apr-21**: 49.5
- **Apr-22**: 51.2

### Average Income

- **Apr-22**: $105,303
- **Apr-21**: $100,422
- **Apr-19**: $99,819

### Average Daily Spending

- **Apr-22**: $294.01
- **Apr-19**: $273.24
- **Apr-21**: $242.29
VISIT ST. PETE/CLEARWATER Q1 2022

**Average Time Between Q1ision to Visit & Arrival**

- Q1-20: 63.7
- Q1-21: 60.1
- Q1-22: 43.2

**Average Daily Spending**

- Q1-22: $266.28
- Q1-21: $268.41
- Q1-20: $197.24

**Travel Party Size**

- Q1-21: 2.4
- Q1-20: 2.3

**Average Days & Nights**

- Days:
  - Q1-20: 2.3
  - Q1-21: 2.5
  - Q1-22: 3.1

- Nights:
  - Q1-20: 4.3
  - Q1-21: 3.5
  - Q1-22: 2.8

**Percent Staying Overnight**

- Q1-20: 40.5%
- Q1-21: 38.5%
- Q1-22: 44.6%

**Generations**

- Boomers or older:
  - Q1-20: 51.4%
  - Q1-21: 45.5%
  - Q1-22: 48.7%

- Other:
  - Q1-20: 33.2%
  - Q1-21: 38.9%
  - Q1-22: 35.7%

**Average Age**

- Q1-20: 51.1
- Q1-21: 50.8
- Q1-22: 51.9

**Average Income**

- Q1-22: $104,406
- Q1-21: $111,830
- Q1-20: $99,980
**Average Time Between Decision to Visit & Arrival**

- Q2-21: 53.7
- Q3-21: 49.0
- Q4-21: 42.5
- Q1-22: 39.3

**Average Daily Spending**

- Q2-21: $274
- Q3-21: $281
- Q4-21: $260
- Q1-22: $264

**Travel Party Size**

- Q2-21: 2.2
- Q3-21: 2.7
- Q4-21: 2.3
- Q1-22: 2.8

**Average Days & Nights**

- Days: 3.0
- Nights: 2.8

**Generations**

- Boomer or older:
  - Q2-21: 34.7%
  - Q3-21: 37.7%
  - Q4-21: 36.1%
  - Q1-22: 48.7%

- Other:
  - Q2-21: 44.8%
  - Q3-21: 44.6%
  - Q4-21: 42.6%
  - Q1-22: 35.7%

**Average Age**

- Q2-21: 47.1
- Q3-21: 48.2
- Q4-21: 47.4
- Q1-22: 47.1

**Percent Staying Overnight**

- Q2-21: 36.4%
- Q3-21: 38.0%
- Q4-21: 39.5%
- Q1-22: 44.6%

**Average Income**

- Q2-21: $108,907
- Q3-21: $105,882
- Q4-21: $105,097
- Q1-22: $104,401

**Visit St. Pete/Clearwater Quarterly Comparison**
DETAILED FINDINGS
**Point of Origin**

Country of Origin

- United States: 94.2%
- Canada: 2.9%
- Germany: 0.6%
- France: 0.6%
- United Kingdom: 0.5%
- Mexico: 0.0%
- China: 0.0%
- Other: 1.3%

State of Origin

- Florida: 34.5%
- New York: 7.8%
- Massachusetts: 6.0%
- Wisconsin: 5.0%
- Michigan: 4.4%
- Illinois: 4.3%
- Indiana: 3.8%
- Ohio: 3.0%
- Pennsylvania: 2.7%
- Maryland: 2.4%
- New Jersey: 2.0%
- Connecticut: 1.9%

MSA of Origin

- Tampa, FL: 15.8%
- Orlando, FL: 9.1%
- Sarasota-Bradenton, FL: 4.9%
- Boston, MA: 4.3%
- Chicago, IL: 4.1%
- Lakeland-Winter Haven, FL: 3.0%
- New York, NY-NJ: 2.5%
- Minneapolis-St. Paul, MN-WI: 2.2%
- Indianapolis, IN: 2.1%
- Albany-Schenectady-Troy, NY: 2.1%
- Washington, DC-MD-VA: 1.6%
- Detroit, MI: 1.6%

Base: 2022 - April 443 responses.
Lodging Type / Daily Spending in Market

Lodging Type

- Hotel, resort or motel in SPC: 16.9%
- Home share rental in the SPC: 3.7%
- Condo/vacation home in the SPC: 8.9%
- Private residence in SPC: 14.0%
- Day trip: 56.1%

Daily Spending

- Restaurants: $109.73
- Hotel/motel/inn/lodging: $87.20
- Retail store purchases: $44.63
- Other Entertainment & sightseeing: $27.30
- Gas, parking and local transportation: $21.12
- Car rental (in area only): $1.01
- Other: $4.37

Mean Travel Party Spending = $295.36
Avg # of People Covered by Spending = 2.64
Mean Spending Per Person = $111.97

Base: 2022 - April 443 responses.
Days & Nights in St. Pete/Clearwater

**Days in Market**

- **0 days**: 52.1%
- **1 day**: 10.3%
- **2 days**: 7.0%
- **3 days**: 8.7%
- **4 days**: 5.7%
- **5 days**: 2.7%
- **6 days**: 2.7%
- **7 days**: 2.6%
- **8 days**: 6.8%
- **9 days**: 2.4%
- **10 or more**: 5.6%

**Mean Days**

- **(≤ 30)**: 3.1
- **(> 30)**: 5.4

**Nights in Market**

- **0 nights**: 0%
- **1 night**: 10.3%
- **2 nights**: 7.0%
- **3 nights**: 8.7%
- **4 nights**: 5.7%
- **5 nights**: 2.7%
- **6 nights**: 2.7%
- **7 nights**: 2.6%
- **8 nights**: 6.8%
- **9 nights**: 2.4%
- **10 or more**: 5.6%

**Mean Nights**

- **(≤ 30)**: 2.1
- **(> 30)**: 4.3

Base: 2022 - April 443 responses.
Primary Reason for Visit

- Vacation: 57%
- Visit friends or family in the area: 15%
- Other personal reasons: 9%
- Weekend getaway: 9%
- Attend special event, exhibition or concert: 8%
- Business: 1%
- Wedding: 1%
- Conference/tradeshow or other group meeting: 0%
- Attend sports event/tournament: 0%
- Honeymoon: 0%
- On or pre/post a cruise: 0%
- Government business/travel: 0%

Other Destinations Visited on SPC Trip

- Tampa: 29%
- Sarasota Area: 11%
- Orlando/Disney: 10%
- Lakeland/Winter Haven: 4%
- Ft. Myers/SW Florida: 3%
- Miami: 2%
- Florida Keys: 1%
- Jax/St. Augustine: 1%
- Ft. Lauderdale/Palm Beach: 1%
- Daytona: 1%
- Kennedy/Space…: 1%
- Ocala/Gainesville: 1%
- Crystal River: 1%
- Everglades: 1%
- Panhandle: 0%
- Sebring: 0%
- Tallahassee: 0%
-NONE—The St. : 49%

Base: 2022 - April 443 responses.
Method of Arrival / Arrival Airport & Airline

Method of Arrival

<table>
<thead>
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<th>Percentage</th>
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<tbody>
<tr>
<td>Personal vehicle</td>
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<tr>
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<td>Rideshare (Uber, Lyft, etc.)</td>
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<td>RV</td>
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<tr>
<td>Train</td>
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<tr>
<td>Public bus</td>
<td>0%</td>
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<tr>
<td>Taxi or limo</td>
<td>0%</td>
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<tr>
<td>Other</td>
<td>1%</td>
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</tbody>
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Method of Departure

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</tbody>
</table>

Base: 2022 - April 443 responses.
Method of Arrival / Arrival Airport & Airline

**Airport of Arrival**

- Tampa Int'l.: 71%
- Orlando Int'l.: 14%
- St. Pete-Clearwater Int'l.: 11%
- Miami Int'l.: 2%
- Sarasota/Bradenton Int'l.: 1%
- SW Fl Int'l. (Ft. Myers): 0%
- Ft. Lauderdale Int'l.: 0%
- Palm Beach Int'l.: 0%
- Sanford Int'l.: 0%
- Jacksonville Int'l.: 0%
- Other: 0%

**Airline Used by Airport of Arrival**

- Tampa Int'l.:
  - Southwest: 24.7%
  - Delta Airlines: 23.7%
  - American Airlines: 16.5%
  - Allegiant: 11.9%
  - United: 4.0%
  - Jet Blue: 0.2%
  - Sun Country: 0.0%
  - Alaska Airlines: 0.0%
  - Other: 19.0%

- St. Pete-Clearwater Int'l.:
  - Southwest: 95.8%

Base: 2022 - April 443 responses.
Rental Vehicle Pick-Up City / Transportation Used In-Market

**Rental Vehicle Pick-Up City**
- Tampa: 70%
- Orlando: 15%
- Sarasota/Bradenton: 6%
- Miami: 5%
- St. Petersburg/Clearwater area: 4%
- Fort Lauderdale: 0%
- Ft. Myers: 0%
- West Palm Beach: 0%
- Jacksonville: 0%
- Outside of Florida: 0%
- Sanford: 0%

**Transportation Used In-Market**
- Personal vehicle: 63%
- Rental vehicle: 27%
- Uber, Lyft, etc.: 7%
- Tour bus: 4%
- Free Beach Rides: 2%
- Public bus: 1%
- Taxi or limo: 0%
- RV: 0%
- Bicycle: 0%
- Motorcycle: 0%
- Boat: 0%

Base: 2022 - April 443 responses.
Travel Party Composition

- Solo: 10%
- Couple: 50%
- Immediate Family: 36%
- Extended Family: 1%
- Group of Couples: 3%
- Group of Friends: 13%
- Tour Group: 1%
- Business Associates: 0%
- Other: 1%

Travel Party Size

- Female adults (18 yrs. +): 1.4
- Male adults (18 yrs. +): 0.9
- Female children (0 to 17 yrs.): 0.3
- Male children (0 to 17 yrs.): 0.2

Avg Travel Party Size = 2.8
Percent with Children = 23.4%

Base: 2022 - April 443 responses.
Important Factors to Destination Decision / Trip Activities

**Important to Decision to Visit**

- Beaches that suit my tastes: 41%
- Weather: 37%
- Scenic beauty: 36%
- Overall ambiance & atmosphere: 34%
- Easy to get to: 28%
- Friends or family in the area: 23%
- Attractions in the area: 21%
- “Restaurants, cuisine, food scene”: 16%
- Recommendation from people I know: 14%
- Outdoor recreational opportunities: 12%
- Special event(s) and/or festival(s): 11%
- Arts & cultural offerings: 11%
- Shopping opportunities: 10%
- St. Pete Pier: 7%
- Appealing hotels/resorts: 3%

**Trip Activities**

- Dining in restaurants: 88%
- Visit the beach: 79%
- Shopping: 65%
- Swimming: 47%
- Photography: 25%
- Visit friends or family: 23%
- Visit museums: 21%
- Attend a festival or special event: 17%
- Guided tour: 12%
- Other boating: 9%
- Bars/Nightlife: 7%
- Shelling: 6%
- Fishing: 4%
- Jet skiing: 4%
- Take a dining cruise: 3%

*Base: 2022 - April 443 responses.*
First-Time Visit to Florida / Previous Visitation to St. Pete/Clearwater

First Time Visitors to Florida

- Yes: 11.5%
- No: 88.5%

Previous Visitation to the St. Pete/Clearwater Area

- First Time Visitor: 32%
- 1 - 10 Previous Visits: 43%
- 11 - 20 Previous Visits: 10%
- More than 20 Visits: 14%

Mean # of Past Trips = 7.2

Base: 2022 - April 443 responses.
**Attractions Visited**

- St. Pete Pier: 18%
- Chihuly Exhibit: 10%
- Dali Art Museum: 7%
- Orlando area Theme Parks: 5%
- Sunken Gardens: 4%
- Tarpon Springs: 3%
- Clearwater Marine Aquarium: 3%
- Ft. Desoto Park: 3%
- Busch Gardens: 2%
- Florida Botanical Gardens: 1%
- Other: 3%
- NONE OF THESE: 62%

**Communities Visited**

- Clearwater Beach: 52%
- Madeira Beach: 36%
- St. Petersburg: 32%
- St. Pete Beach: 16%
- Treasure Island: 14%
- Clearwater: 10%
- Indian Shores & Indian Rocks: 9%
- Dunedin: 7%
- North Redington: 6%
- Largo: 6%
- Tarpon Springs: 5%
- Pass-A-Grille Beach: 4%
- Seminole: 3%
- Pinellas Park: 3%
- Gulfport: 2%

*Base: 2022 - April 443 responses.*
Most Liked Aspects of SPC (Unaided)

- Beaches / Ocean: 51%
- Everything: 23%
- Scenic Beauty: 22%
- Tropical Climate / Warm Weather: 21%
- Entertainment / Variety of Fun: 17%
- Relaxing Atmosphere / Ambiance: 9%
- "Attractions (Museums, …): 8%
- Friendly People: 6%
- Food / Restaurants & Bars: 5%
- Clean: 4%
- Accessible / Convenient / Walkable: 4%
- Shopping: 3%
- Great Location / Easy to get to: 1%
- Safe: 1%
- Family Friendly: 1%

Feelings in SPC Area (Unaided)

- Calm / Relaxed: 57%
- Happy: 26%
- Amazing: 9%
- Energized / Excited: 5%
- Fine / Good: 4%
- Refreshed / Healthy: 3%
- Comfortable: 3%
- Warm: 2%
- Entertained: 1%
- Welcomed: 1%

Base: 2022 - April 443 responses.
Attractions or Services that Would Enhance the Destination Experience

Additional Attractions or Services (Unaided)

- It needs no improvement: 78%
- Cheaper & More Parking: 15%
- Less congestion / traffic: 3%
- More Affordable: 3%
- More Public Transportation Options: 2%
- More Shopping: 1%
- More Activities / Attractions: 1%
- Clean it up: 1%
- Finish the Pier: 1%
- Restaurant Diversity: 0%
- More public restrooms: 0%
- Tourist Information: 0%
- Bars and food options on the beach: 0%
- Better Signage / accessibility: 0%
- More shaded / green areas: 0%

Base: 2022 - April 443 responses.
When Decision to Visit was Made / Travel Planning Resources Used

Average Time Between Decision to Visit and Arrival

69.7 Days in Advance

Resources Used before Arrival and While In Market

- **User-generated content/Review websites, such as Yelp and TripAdvisor**: 38% (BEFORE ARRIVING), 38% (WHILE IN ST. PETE/CLEARWATER AREA)
- **Opinions of friends or relatives**: 37% (BEFORE ARRIVING), 37% (WHILE IN ST. PETE/CLEARWATER AREA)
- **Online travel agencies (Expedia, Travelocity, etc.)**: 32% (BEFORE ARRIVING), 32% (WHILE IN ST. PETE/CLEARWATER AREA)
- **Social Media content**: 31% (BEFORE ARRIVING), 31% (WHILE IN ST. PETE/CLEARWATER AREA)
- **Official St. Petersburg/Clearwater area tourism website, www.VisitStPeteClearwater.com**: 17% (BEFORE ARRIVING), 26% (WHILE IN ST. PETE/CLEARWATER AREA)
- **Travel guides, brochures**: 6% (BEFORE ARRIVING), 7% (WHILE IN ST. PETE/CLEARWATER AREA)
- **Television programming**: 1% (BEFORE ARRIVING), 2% (WHILE IN ST. PETE/CLEARWATER AREA)
- **Travel agency (traditional, offline)**: 1% (BEFORE ARRIVING), 1% (WHILE IN ST. PETE/CLEARWATER AREA)
- **Newspaper travel section**: 1% (BEFORE ARRIVING), 1% (WHILE IN ST. PETE/CLEARWATER AREA)
- **Radio programming**: 1% (BEFORE ARRIVING), 1% (WHILE IN ST. PETE/CLEARWATER AREA)
- **Lifestyle or travel magazines**: 1% (BEFORE ARRIVING), 1% (WHILE IN ST. PETE/CLEARWATER AREA)
- **YouTube or other online videos**: 1% (BEFORE ARRIVING), 1% (WHILE IN ST. PETE/CLEARWATER AREA)
- **Gulf to Bay St. Pete/Clearwater Destination Magazine**: 0% (BEFORE ARRIVING), 1% (WHILE IN ST. PETE/CLEARWATER AREA)

Base: 2022 - April 443 responses.
Experience Satisfaction / Earned & Paid Media Recall

Overall Satisfaction

- Very satisfied: 98%
- Satisfied: 2%
- Neutral—neither satisfied nor unsatisfied: 1%
- Unsatisfied: 0%
- Very unsatisfied: 0%

Base: 2022 - April 443 responses.

Media Recall

- Yes: 38.3%
- No: 55.1%
- Maybe/Not sure: 6.7%
Likelihood to Recommend: 9.9 / 10
Likelihood to Return: 9.6 / 10

Base: 2022 - April 443 responses.
Demographics

Gender Distribution:
- Female: 79.8%
- Male: 19.7%
- Other: 0.4%

Base: 2022 - April 443 responses.

Age Distribution:
- Average Age: 48.8

Income Distribution:
- Average Income: $14

Race/Ethnicity Distribution:
- Caucasian: 87%
- Latino/Hispanic: 4%
- Black/African-American: 3%
- Asian/Pacific Islander: 1%
- American Indian/Alaska Native: 0%
- Other: 3%
- I prefer not to answer: 1%

Marital Status Distribution:
- Single: 19%
- Single with children under 18: 5%
- Married/partnered: 48%
- Married/partnered with children under 18: 18%
- Other: 11%
- I prefer not to answer: 1%

Sexual Orientation Distribution:
- Heterosexual: 97.3%
- LGBTQ: 1.1%
- I prefer not to answer: 1.6%
Visit St. Pete Clearwater
Visitor Profile Study
Infographic Profile: 2022 - April 443 responses.
Infographic Profile: 2022 - April 443 responses.

**Domestic vs. International**
- United States Resident: 94.2%
- International Visitor: 5.8%

**Point of Origin: Top States**
- Florida: 34%
- New York: 8%
- Massachusetts: 6%

**Factors Important to Destination Decision**
- Beaches that suit my tastes: 41%
- Weather: 37%
- Scenic beauty: 36%
- Overall ambiance & atmosphere: 34%
- Easy to get to: 28%
- Friends or family in the area: 23%

**Demographics**
- 14.5% Millennials
- 45.2% Gen X
- 17.6% Baby Boomers
Infographic Profile: 2022 - April 443 responses.

**Seasonality of Visit**
- Jan-Mar: 0%
- Apr-Jun: 100%
- Jul-Sept: 0%
- Oct-Dec: 0%

**Travel Party Size**
- 2.8 People
- 23.4% Traveled with Children

**Daily Spending**
- $111.97 Per Person

**Top Communities Visited**
- Clearwater Beach: 55%
- Madeira Beach: 45%
- St. Petersburg: 35%
- St. Pete Beach: 25%
- Treasure Island: 25%

**Top Activities**
- Dining in restaurants: 88%
- Visit the beach: 79%
- Shopping: 65%
- Swimming: 47%