Visit St. Pete/Clearwater

VISITOR PROFILE STUDY

Report of Findings

May 2019

Research prepared for Visit St. Pete/Clearwater by

Destination Analysts

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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. 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 preliminary report presents the top-line survey data collected from these surveys in May 2019.

Data presented within this report is weighted to accurately reflect the overall population of St. Pete/Clearwater area visitors.

In total, 424 completed surveys from Pinellas County visitors were collected.

Overview & Methodology

Destination Analysts' survey team worked at locations around the St. Pete/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
- John's Pass Village & Boardwalk
- Pier 60
- Sandpearl Resort
- Shephard's Beach Resort
- St. Petersburg-Clearwater International Airport
- Sunken Gardens
- The Chihuly Collection
- The Dali Museum
- Vinoy Renaissance Hotel
- 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:

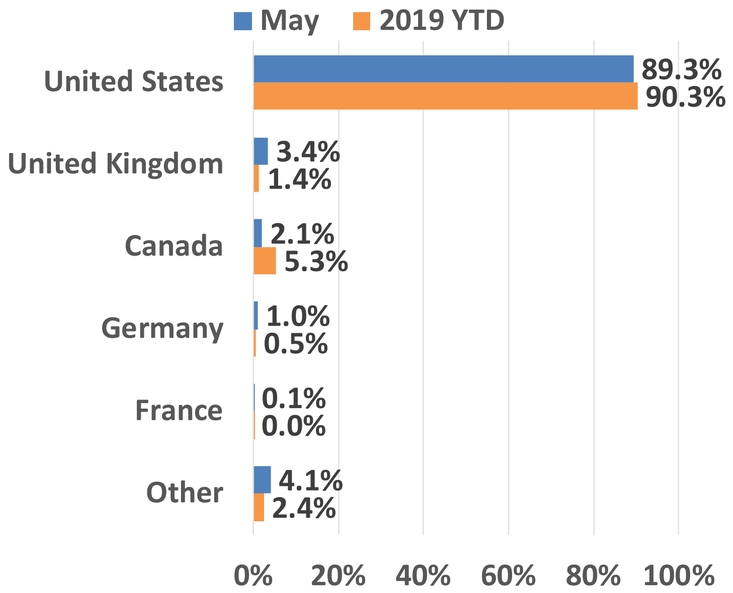
- Detailed trip characteristics (i.e. tripographic information like the reason for visiting the area, length of stay, place of stay, etc.)
- Travel party composition
- Activities & attractions visited in the St. Pete/Clearwater area
- Evaluation of St. Pete/Clearwater brand attributes
- Detailed visitor spending estimates
- Travel planning resources used by St. Pete/Clearwater area visitors
- Visitor satisfaction
- Visitor demographics

Destination Analysts' research staff surveying in the field.

Point of Origin & Demographic Profile

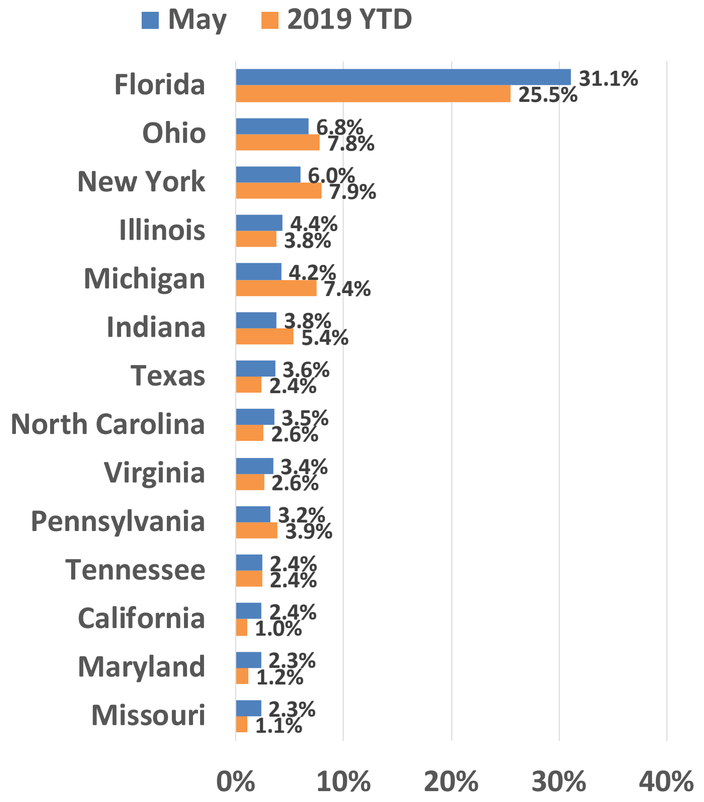
Point Of Origin

Chart: Country of Origin



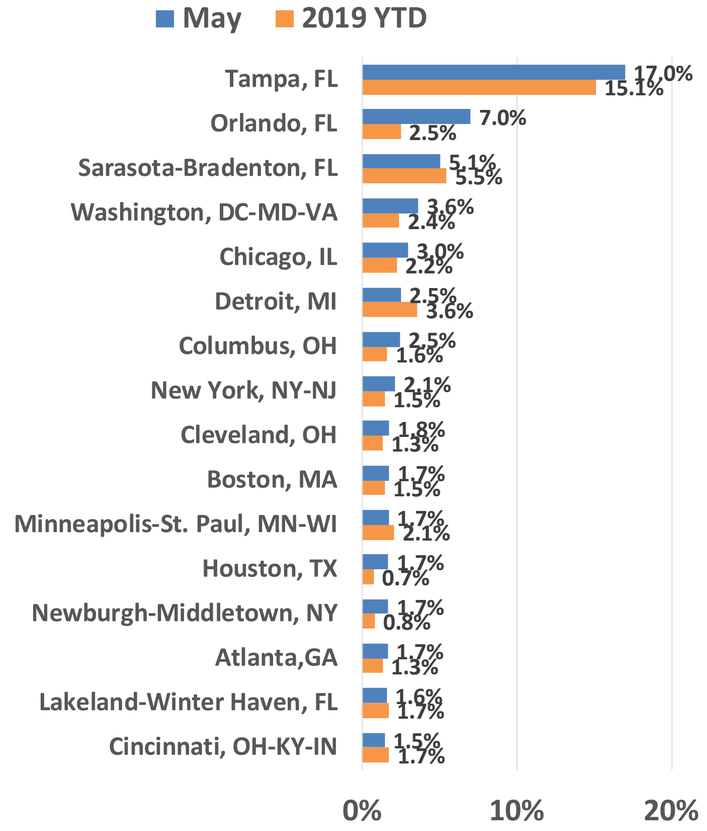
Question: In what country do you reside?
Base: All Respondents. 421 responses.

Chart: State of Origin



Question: What is your zip/postal code?
Base: Domestic respondents. 375 responses.

Chart: MSA of Origin



Question: What is your zip/postal code?
Base: Domestic respondents. 328 responses.

Demographic Profile

The following presents the demographic profile for all respondents surveyed in May 2019.

Mean age – 49.3

Female – 68.4%
Male – 31.2%

Mean household income – $84,766

Married/partnered – 56.2%
Has children under 18 – 12.1%

Ethnicity
Caucasian – 82.5%
Latino/Hispanic – 4.3%
Black/African-American – 6.3%
Asian/Pacific Islander – 3.1%

Heterosexual – 88.7%
LGBTQ – 2.1%

Top 10 Visitor Insights
May 2019

1. In May 2019, the **top domestic visitor markets** represented were **Tampa, FL (17.0%), Orlando, FL (7.0%), and Sarasota-Bradenton, FL (5.1%).** Sarasota-Bradenton had a higher representation of visitors in May 2019 compared to May 2018, when it was the 5th most represented MSA at 3.0 percent.

2. Visitors to the St. Pete/Clearwater area consisted of **10.7 percent international residents**, with the UK (3.4%) as the top international market. In May 2018, the top international market was Canada (6.6% in 2018 vs. 2.1% in 2019).

3. Approximately **70 percent** of domestic survey respondents were **out-of-state residents** (68.9%).

4. **Over one-quarter** of visitors were **first time travelers** to the St. Pete/Clearwater area (27.4%).

5. On average, visitors stayed **3.8 days** in the St. Pete/Clearwater area and spent an average of **$95.62 per person, per day.**

6. The **typical travel party size** was comprised of **2.6 persons**, and 15.0 percent of travel groups traveled with children under 18 (vs. 11.1% in May 2018).

7. May 2019 visitors more commonly visited **other destinations** in addition to St. Pete/Clearwater, compared to May 2018. 36.2 percent of May 2019 visitors took a trip to Tampa (vs. 19.8% in 2018), 13.0 percent went to Orlando/Disney (vs. 9.4% in 2018), and 12.2 percent travelled to the Sarasota area (vs. 6.6% in May 2018).

8. The **most important factors** to the decision to visit the St. Pete/Clearwater area **were "friends or family in the area" (38.7%) and "beaches that suit my taste" (37.4%),** both of which were rated important factors by approximately 40 percent of May 2019 visitors.

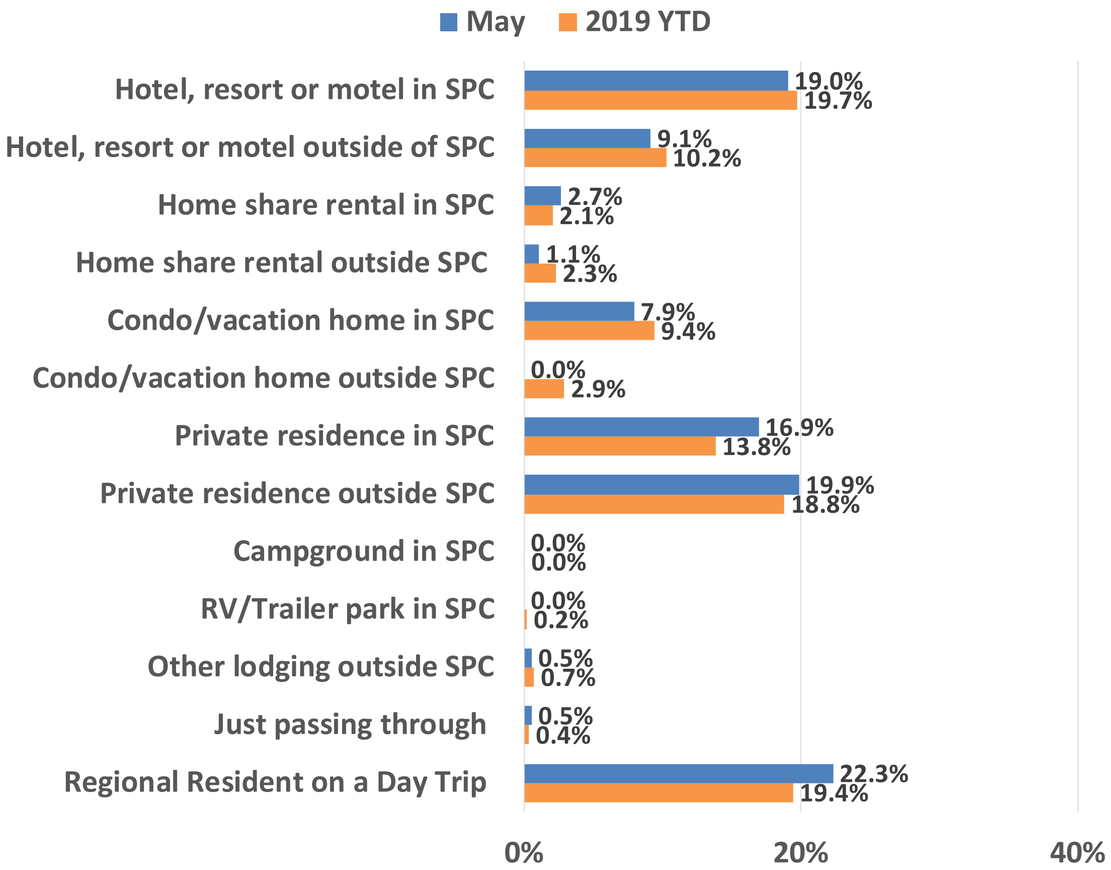
9. There was a **significant increase in May 2019 visitors (42.4%) who recalled reading, seeing, or hearing paid or earned media** for the St. Pete/Clearwater area in the past six months, compared to May 2018 (28.1%).

10. Visitors rated their **likelihood to return** to St. Pete/Clearwater an average of **9.4 out of 10** and rated their **likelihood to recommend** the area to other travelers an average of **9.8 out of 10.**

VISITOR TRIP DETAILS

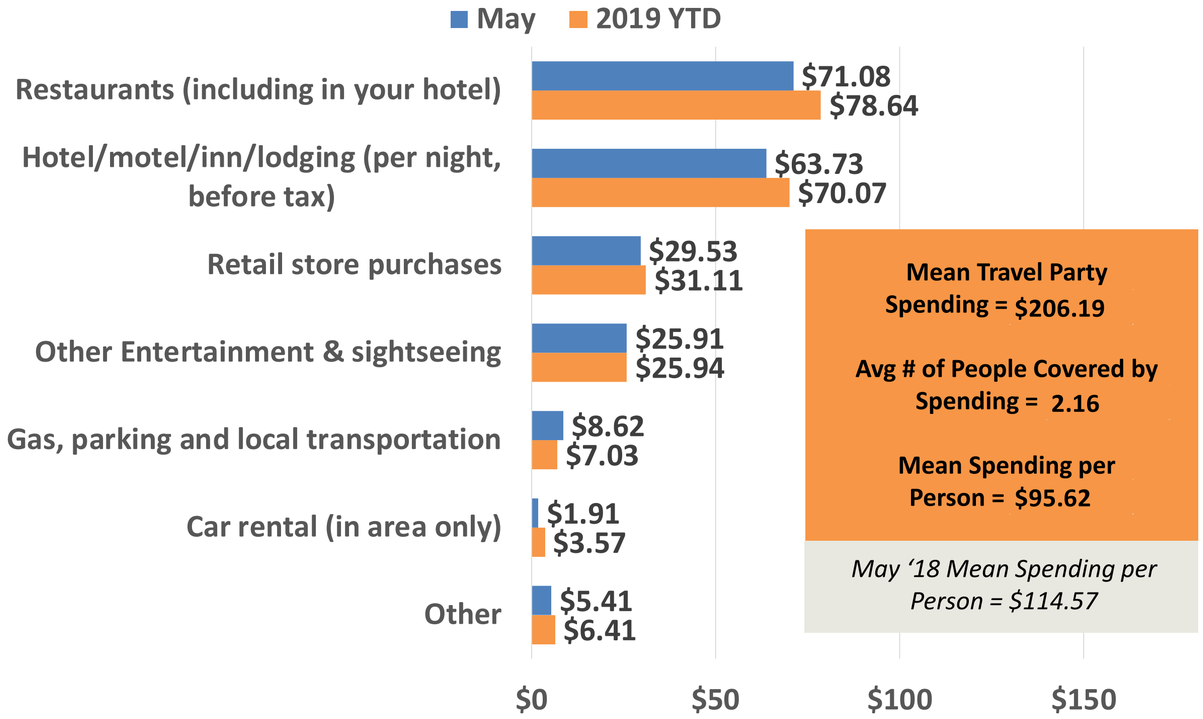
Lodging Type / Daily Spending In-Market

Chart: Type of Lodging



Question: Where are you staying overnight on this trip to the St. Pete/Clearwater area? (Select one)
Base: All Respondents. 424 responses.

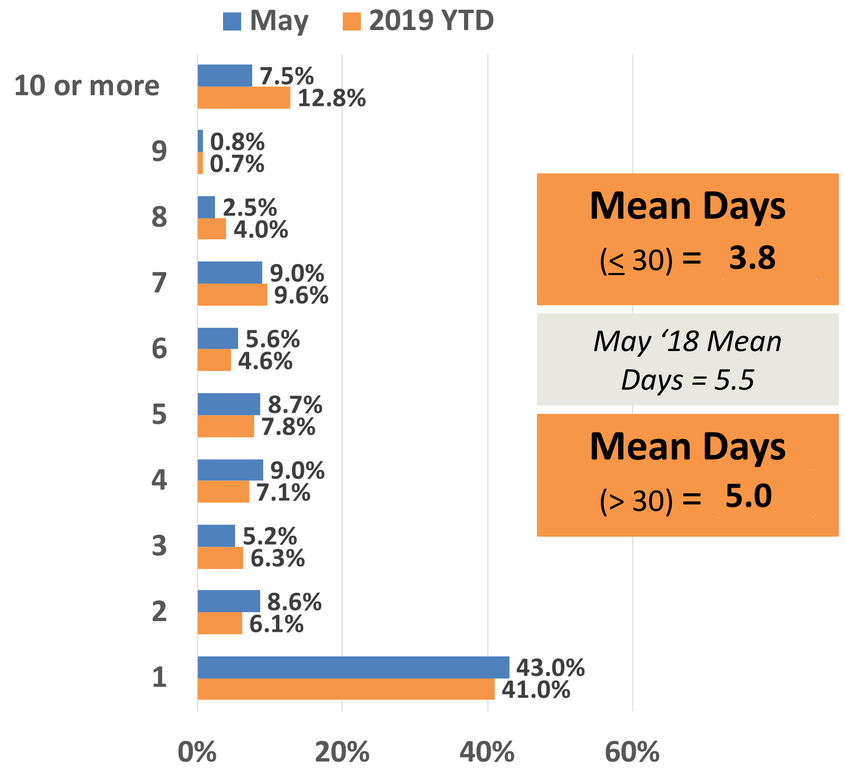
Chart: Per Day Travel Party Spending



Question: Approximately how much will you spend on each of the following while in the St. Petersburg/Clearwater area? Base: All Respondents. 409 responses.

Days & Nights in St. Pete/Clearwater

Chart: Days in Market



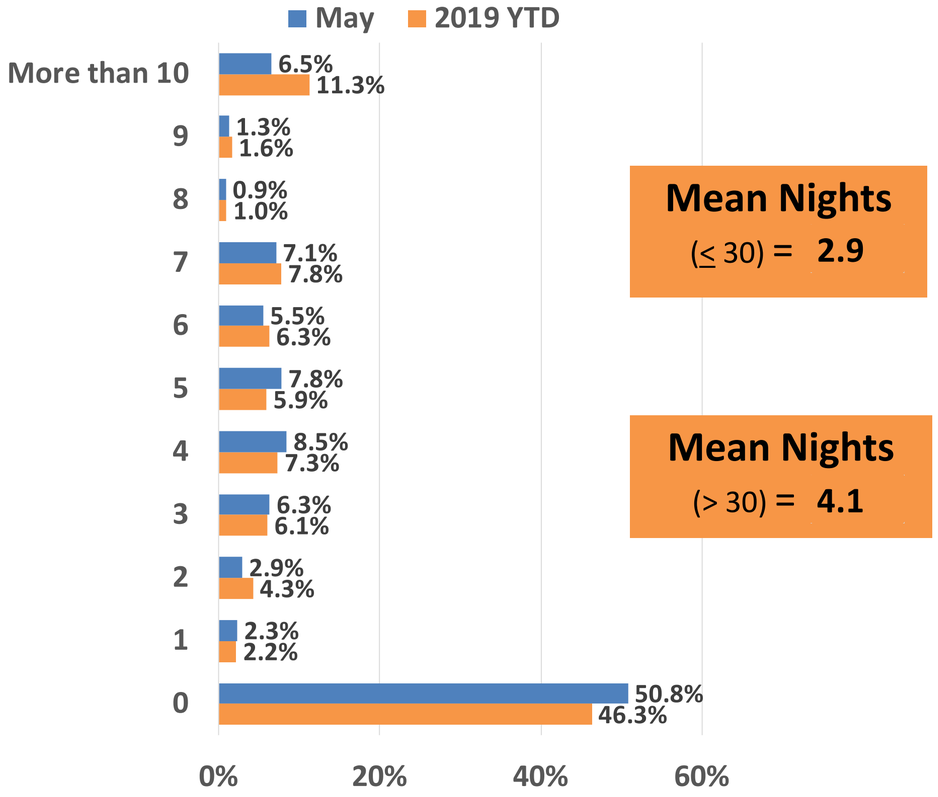
Mean Days
(≤ 30) = **3.8**

May '18 Mean Days = 5.5

Mean Days
(> 30) = **5.0**

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. 411 responses.

Chart: Nights in Market



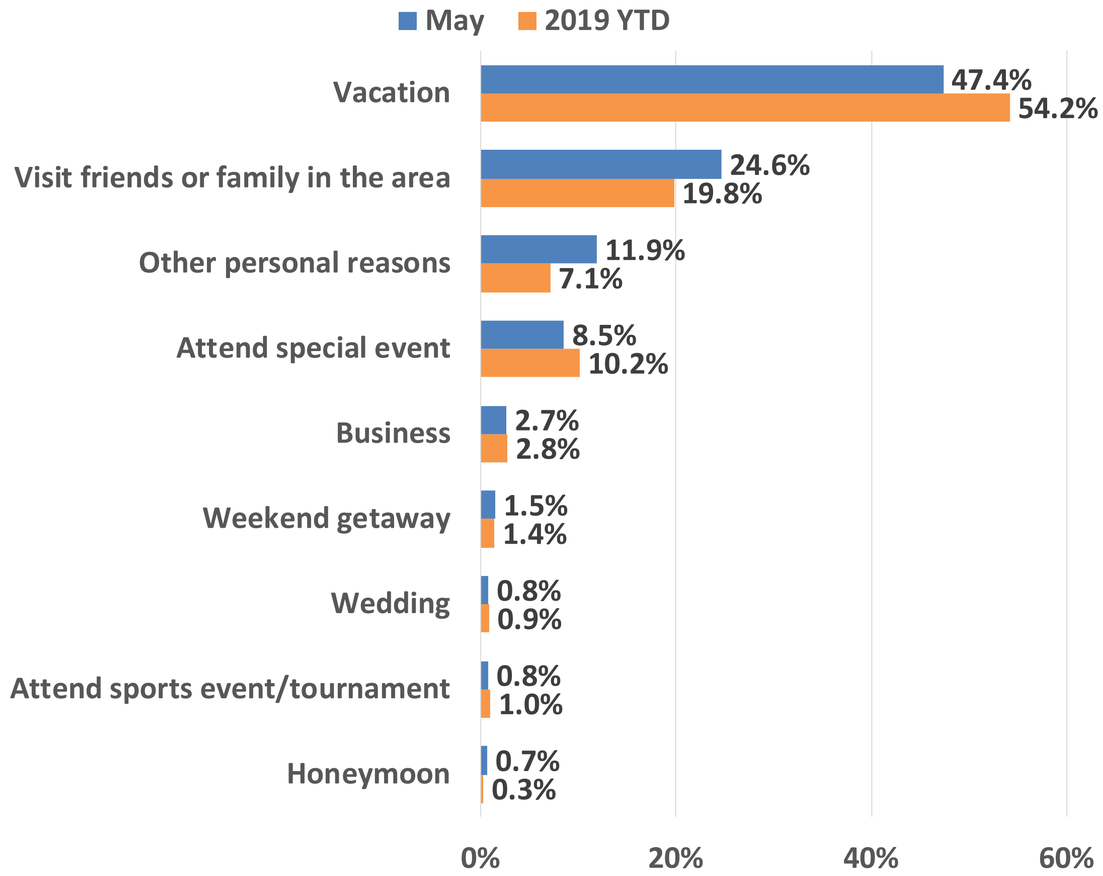
Mean Nights
(≤ 30) = **2.9**

Mean Nights
(> 30) = **4.1**

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. 411 responses.

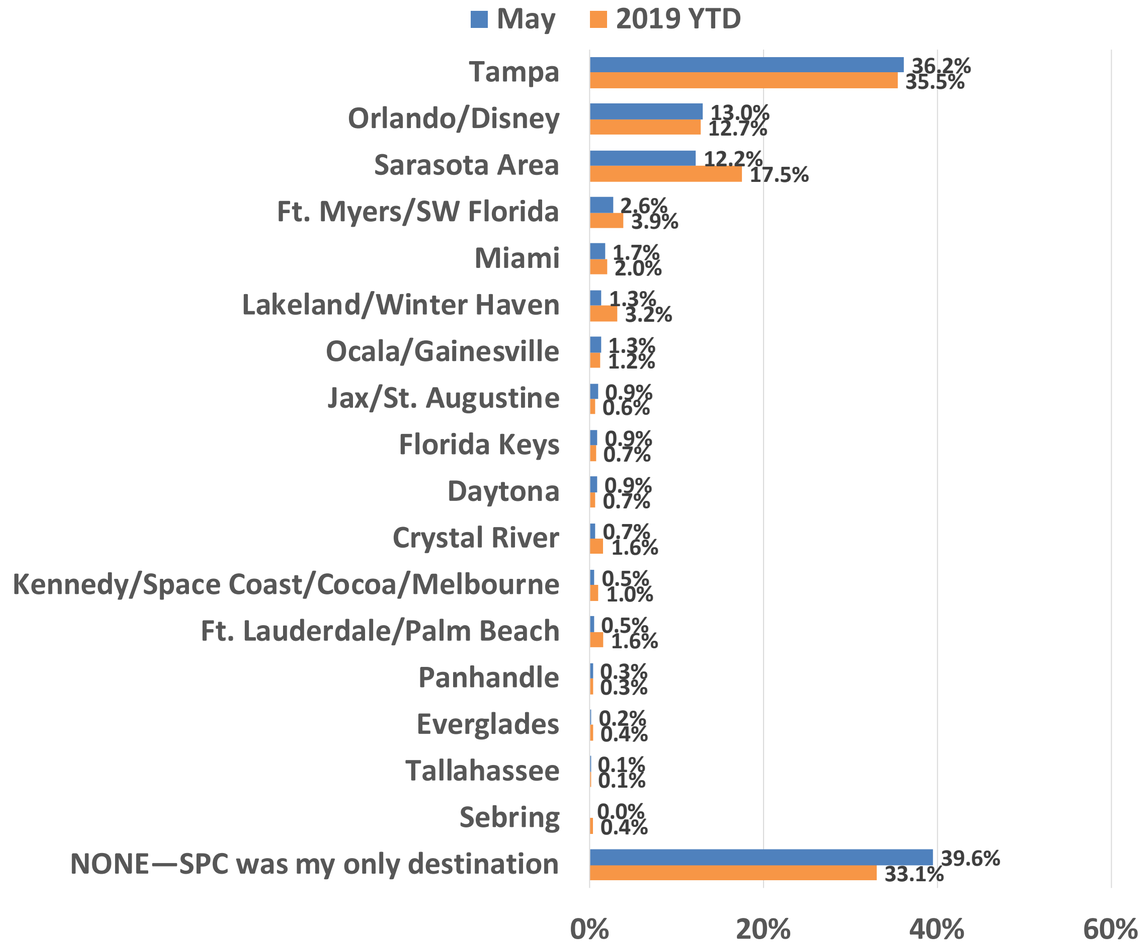
Primary Reason for Visit / Other Destinations Visited

Chart: Primary Reason for Visit



Question: What is your primary reason for visiting the St. Pete/Clearwater Area? (Select one)
Base: All Respondents. 402 responses.

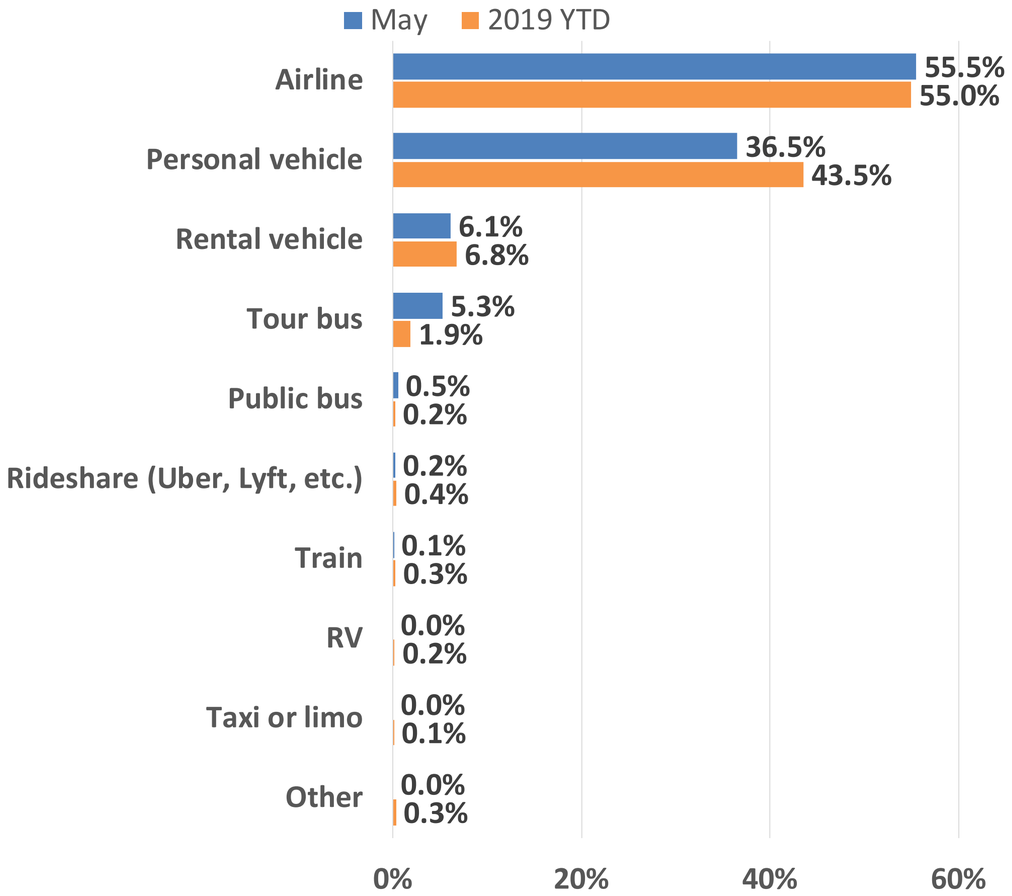
Chart: Other Destinations Visited on St. Pete/Clearwater Trip



Question: Which of these other destinations did you visit while on this trip? (Show list. Select all that apply) Base: All Respondents. 424 responses.

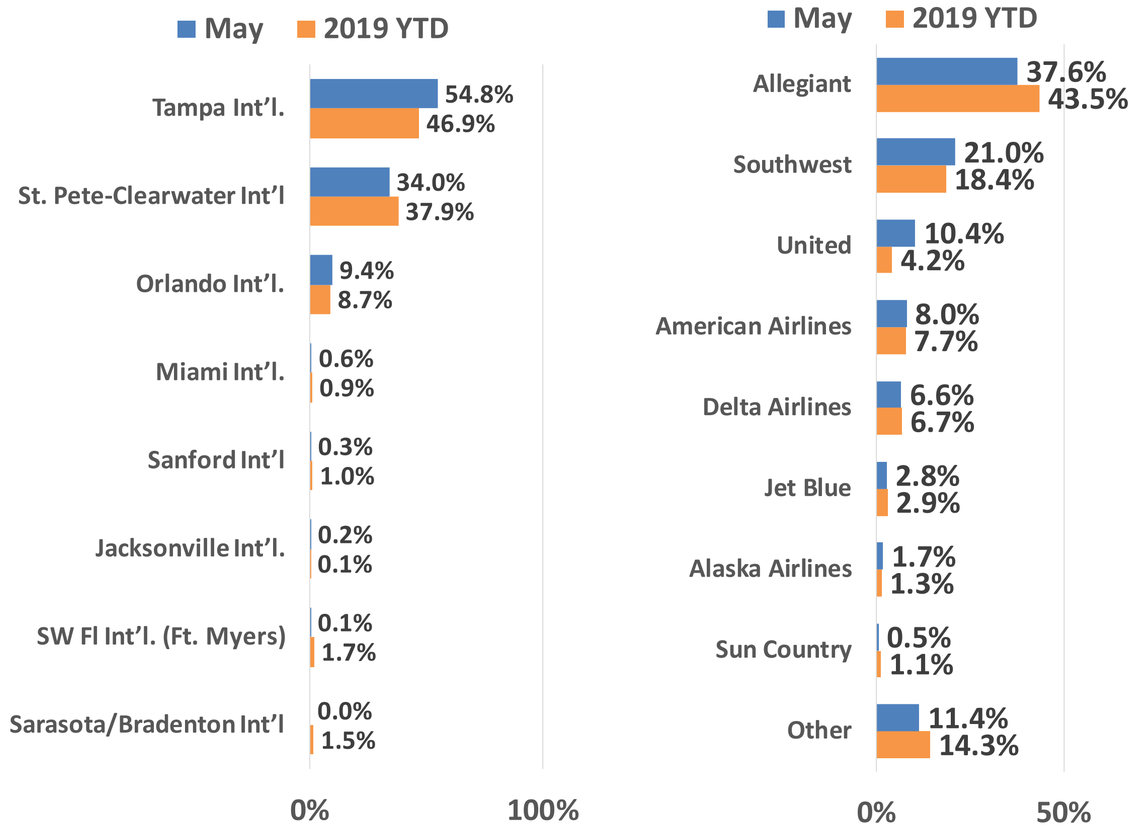
Method of Arrival / Arrival Airport & Airline

Chart: Method of Arrival



Question: How did you arrive into the St. Pete/Clearwater area and how will you leave? (Select all that apply) Base: All Respondents. 424 responses.

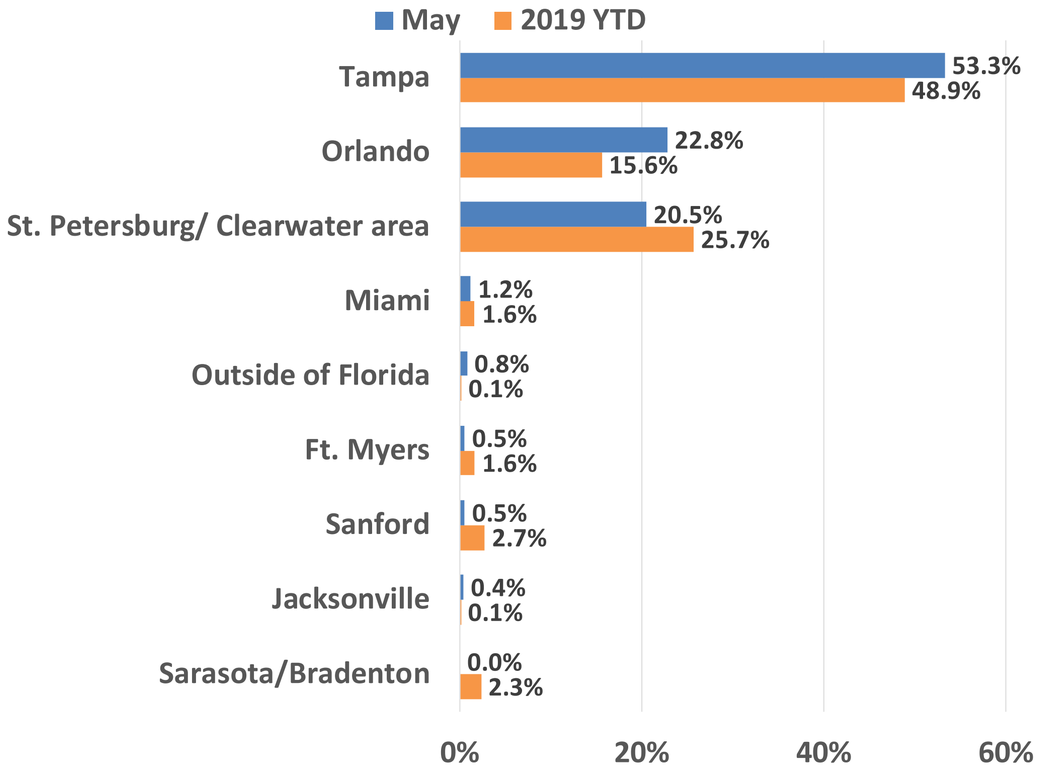
Charts: Airport of Arrival and Airline Used



Question: At which airport did you arrive into the area? Which airline did you use?
Base: Respondents who arrived by Airline. 236 responses.

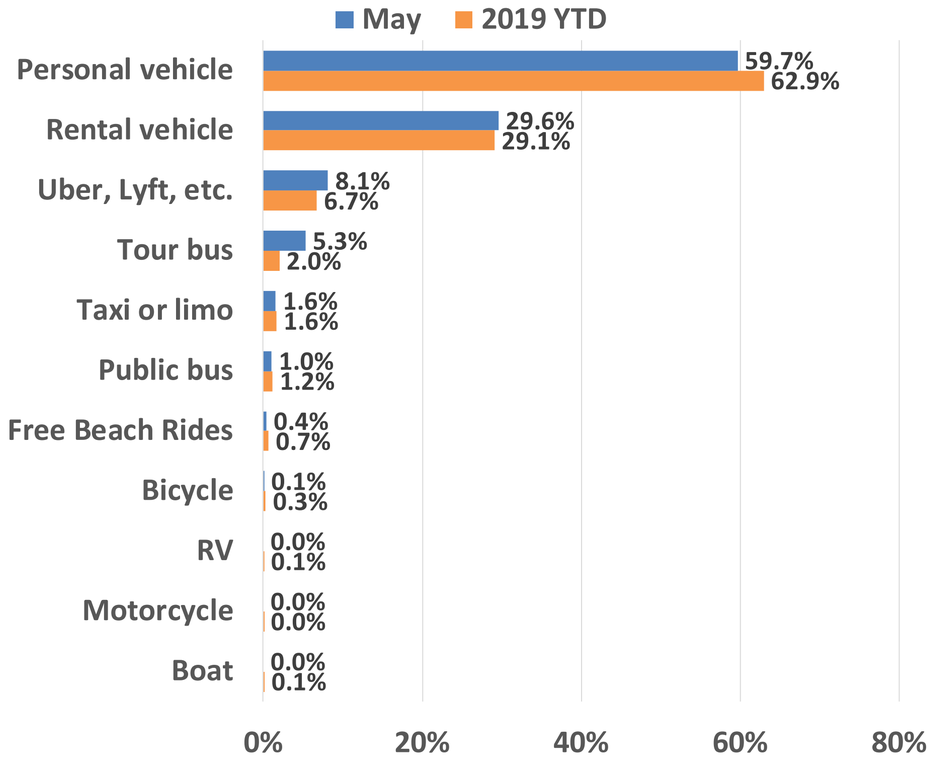
Rental Vehicle Pick-Up City / Transportation Used In-Market

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. 125 responses.

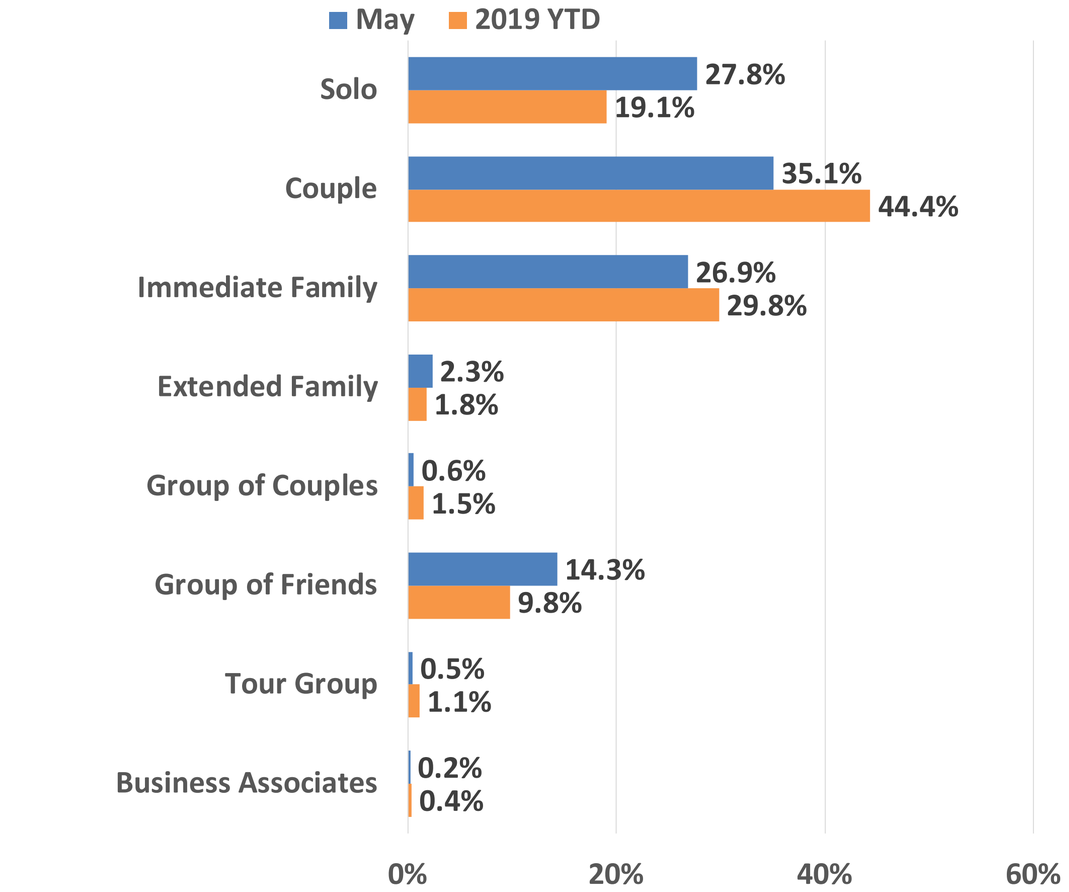
Chart: Transportation Used In-Market



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. 424 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. 422 responses.

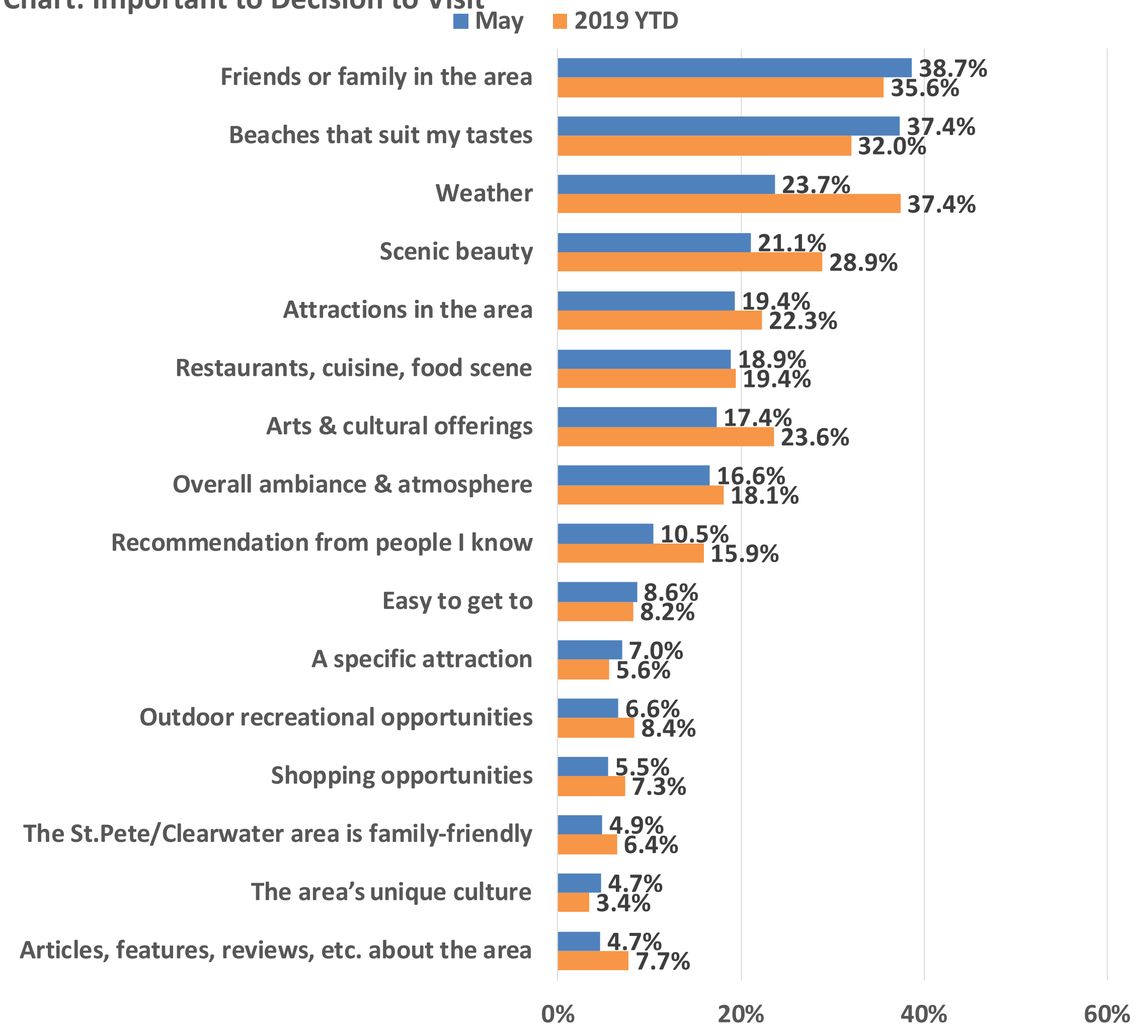
Chart: Travel Party Size

	May	2019 YTD
Male adults (18 yrs. +)	0.92	1.00
Female adults (18 yrs. +)	1.41	1.44
Male children (0 to 17 yrs.)	0.11	0.17
Female children (0 to 17 yrs.)	0.14	0.20
Average Travel Party Size	**2.6**	**2.8**
Percent with children in party	**15.0%**	**18.1%**

Question: How many people of each type are in your immediate travel party, including yourself?
Base: All Respondents. 424 responses.

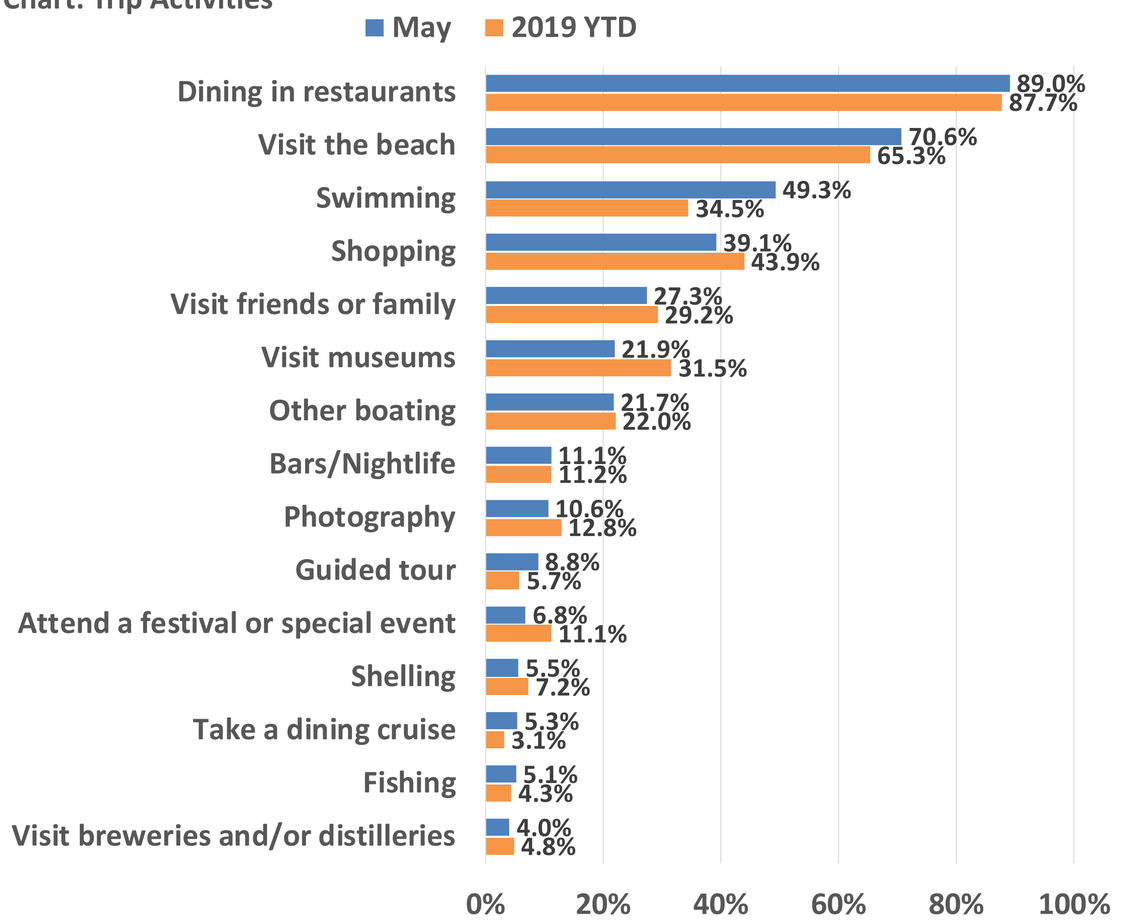
Important Factors to Destination Decision / Trip Activities

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. 412 responses.

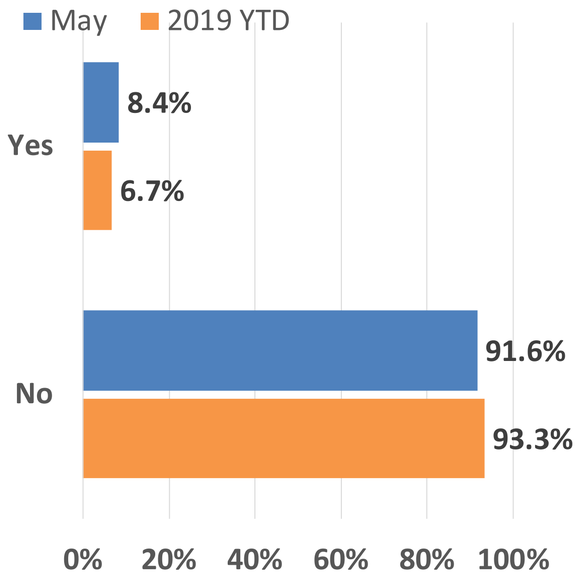
Chart: Trip Activities



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. 424 responses.

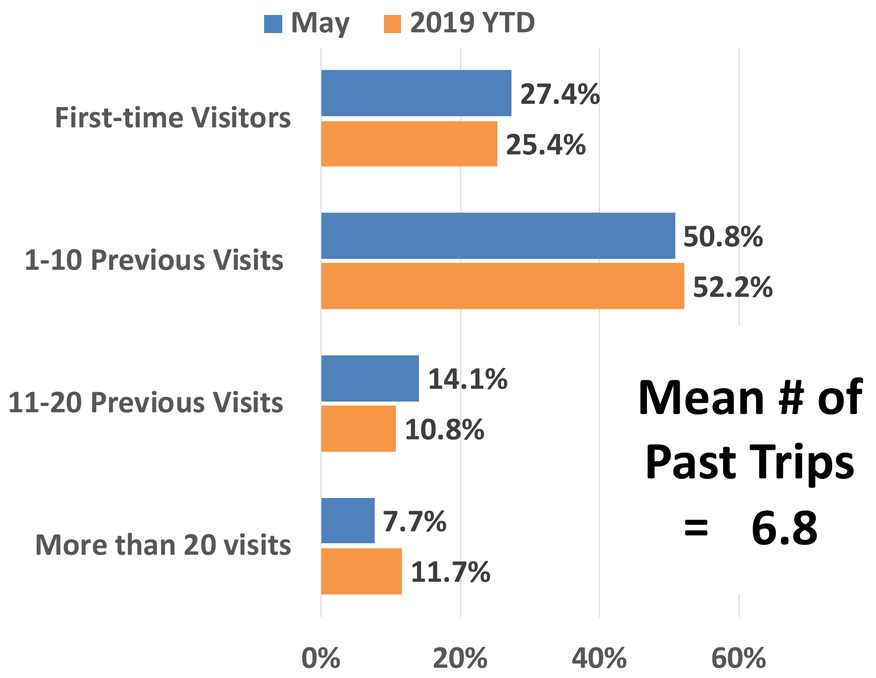
First-Time Visit to Florida / Previous Visitation to St. Pete/Clearwater

Chart: First Time Visitors to Florida



Question: Is this your first visit to Florida?
Base: All Respondents. 422 responses.

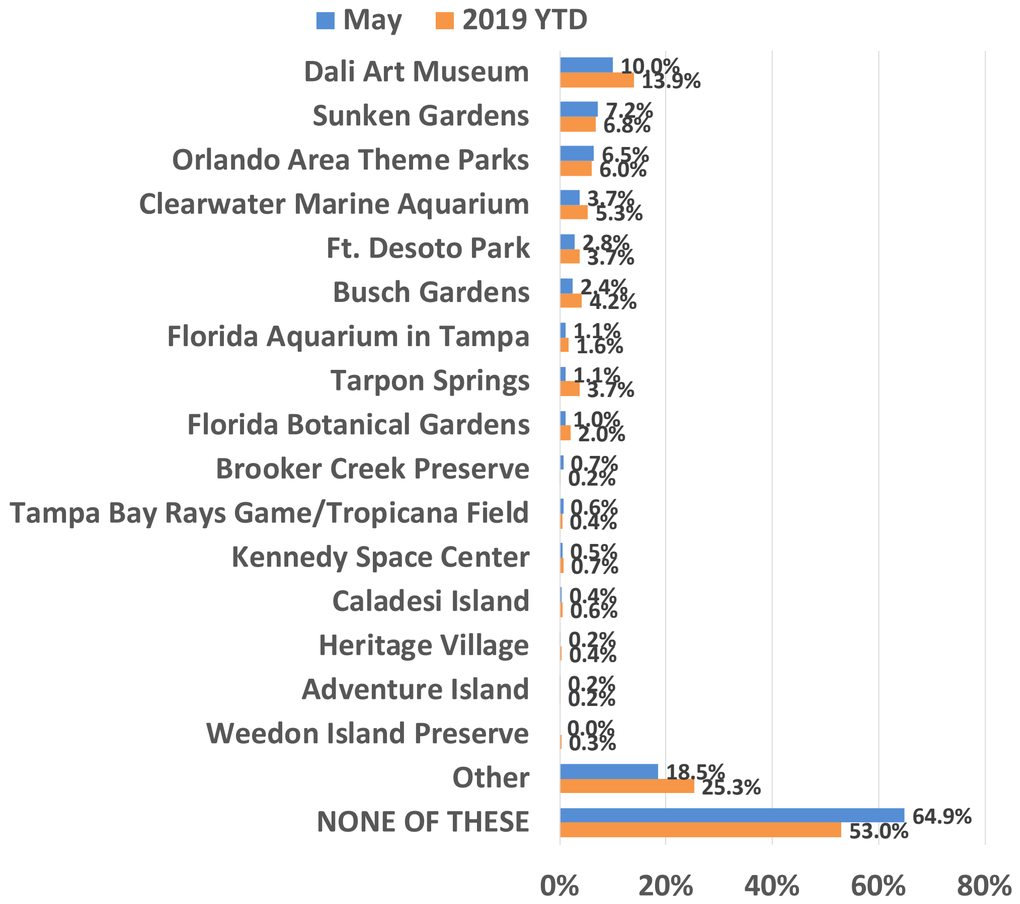
Chart: Previous Visitation to the St. Pete/Clearwater Area



Question: Prior to this visit, how many times have you been to the St. Petersburg/Clearwater area?
Base: All Respondents. 415 responses.

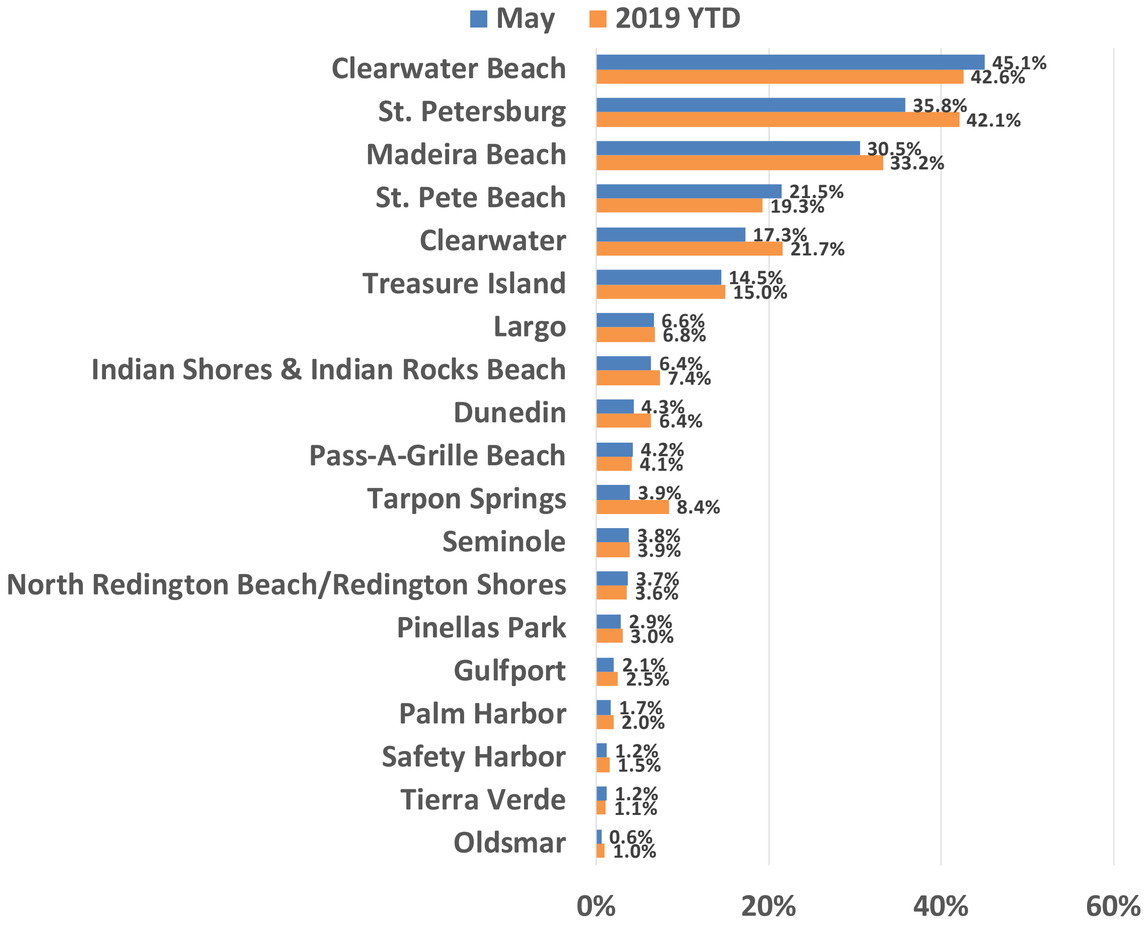
Attractions Visited / Communities Visited

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. 422 responses.

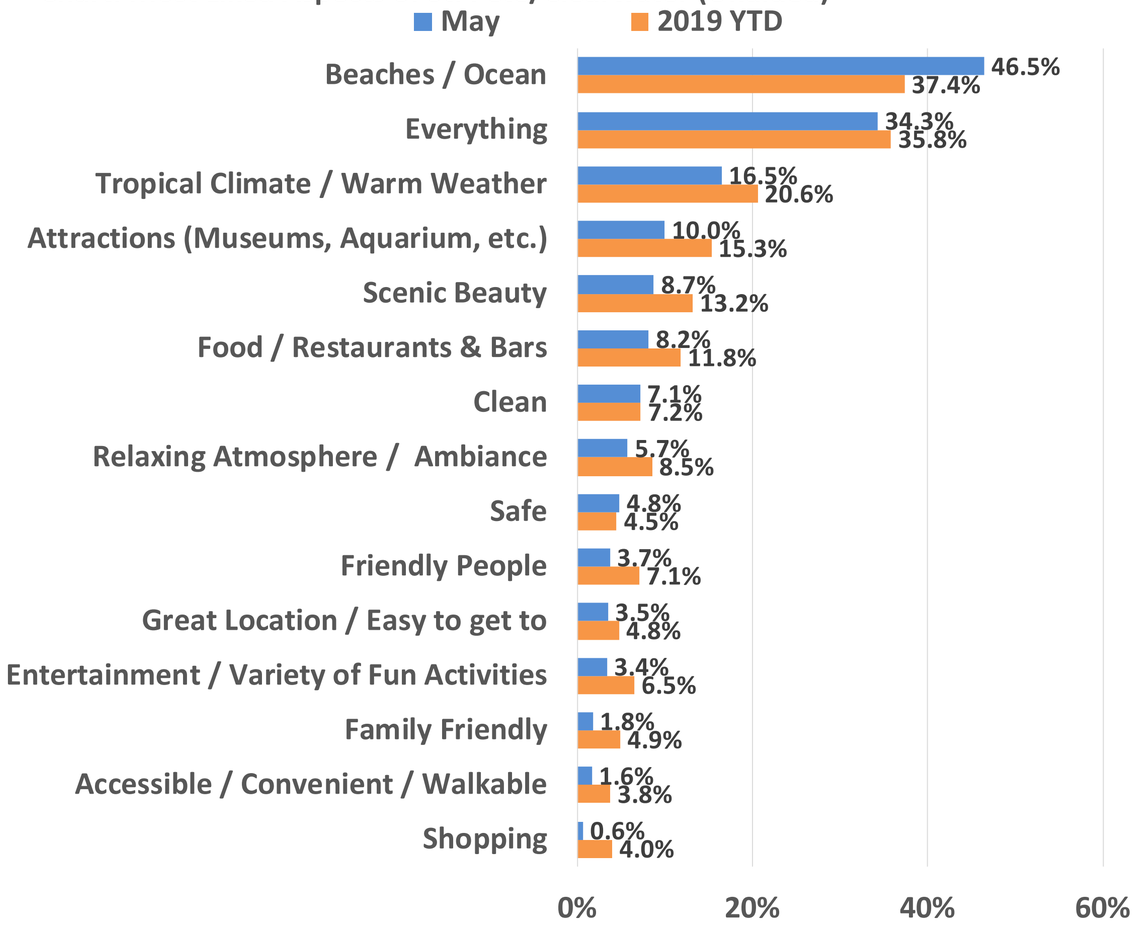
Chart: Communities Visited



Question: Which of the following communities in the St. Pete/Clearwater area did you visit? (Show list. Select all that apply) Base: All Respondents. 424 responses.

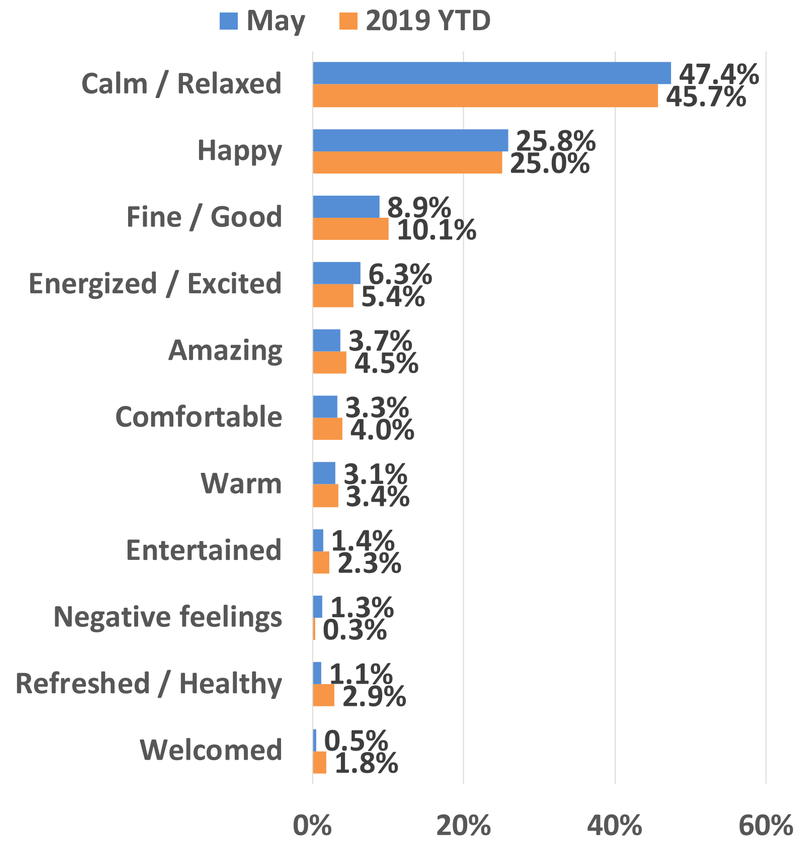
Most Liked Aspect / Feelings in St. Pete-Clearwater

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



Question: What do you like most about the St. Petersburg/Clearwater area?
Base: All Respondents. 415 responses.

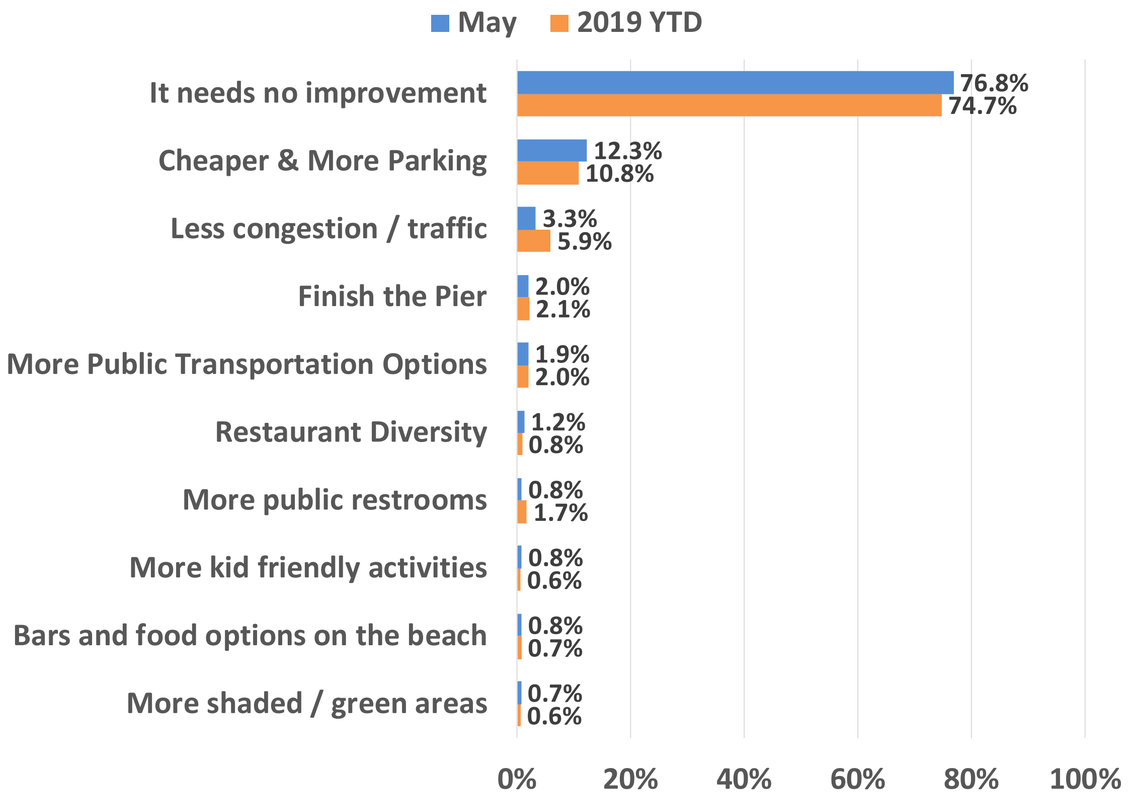
Chart: Feelings in St. Pete/Clearwater Area (Unaided)



Question: What one word or phrase best describes how you feel in the St. Petersburg/Clearwater area? Base: Respondents. 412 responses.

Attractions or Services that Would Enhance the Destination Experience

Chart: Additional Attractions or Services (Unaided)



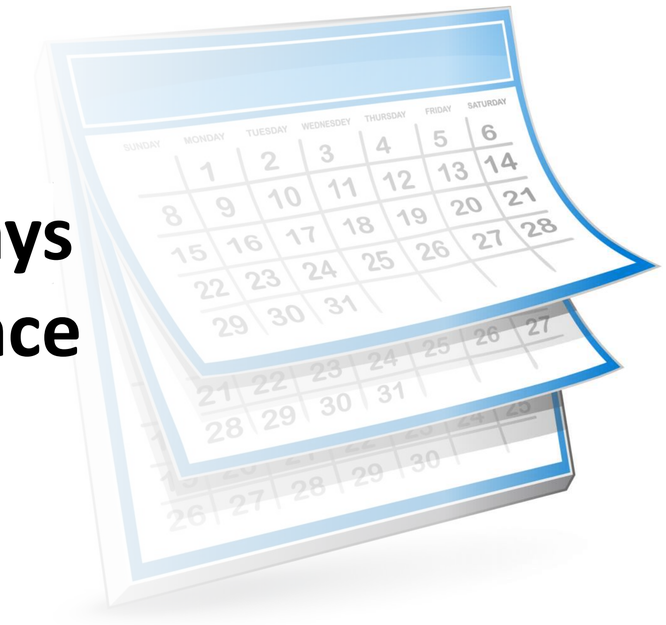
Question: In your opinion, what services or additional attractions would most enhance your experience in the St. Petersburg/Clearwater Area? Base: All Respondents. 403 responses.

Travel Planning And Satisfaction Metrics

When Decision to Visit was Made / Travel Planning Resources Used

Chart: Average Time Between Decision to Visit and Arrival

86.4 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. 422 responses.

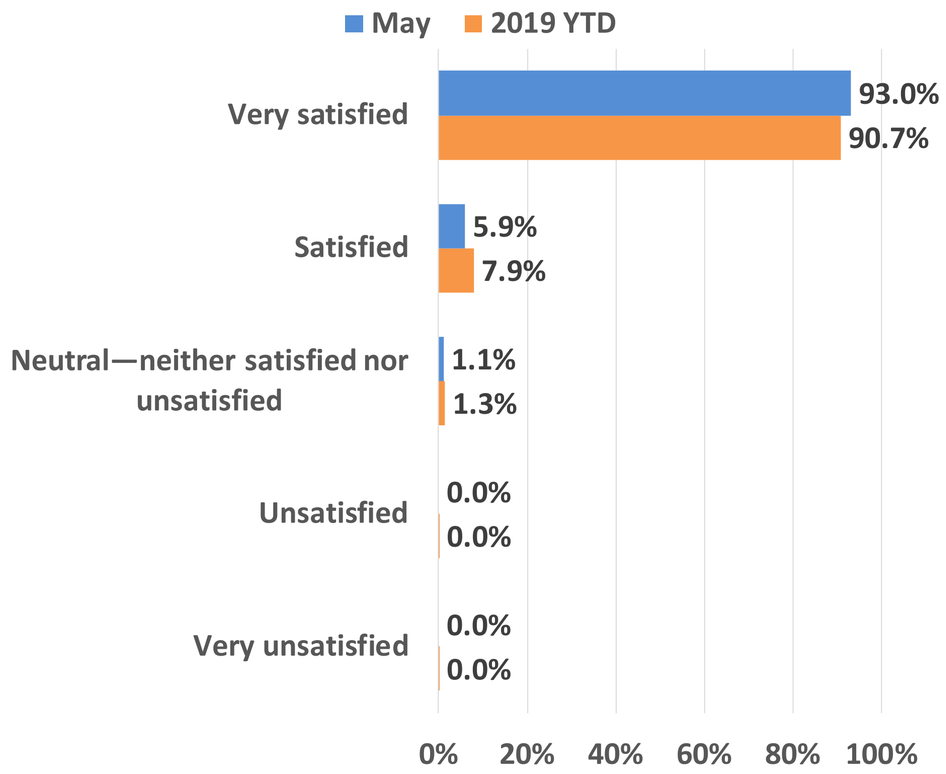
Chart: Resources Used before Arrival and While In Market

	Used Before Arrival	Used In Market
User-generated content/Review websites, such as Yelp and TripAdvisor	53.8%	42.3%
Online travel agencies (Expedia, Travelocity, etc.)	49.8%	14.9%
Opinions of friends or relatives	29.6%	26.1%
Social Media content	24.0%	20.7%
Official St. Petersburg/Clearwater area tourism website, www.VisitStPeteClearwater.com	**11.6%**	**1.9%**
Travel agency (traditional, offline)	3.3%	1.5%
Travel guides, brochures	3.3%	20.3%
YouTube or other online videos	2.7%	2.4%
Television programming	2.2%	8.9%
Radio programming	2.0%	5.6%
Official Visit St. Pete/Clearwater Destination Magazine	**1.5%**	**1.4%**
Newspaper travel section	0.7%	1.1%
Lifestyle or travel magazines	0.7%	1.3%

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. 424 responses.

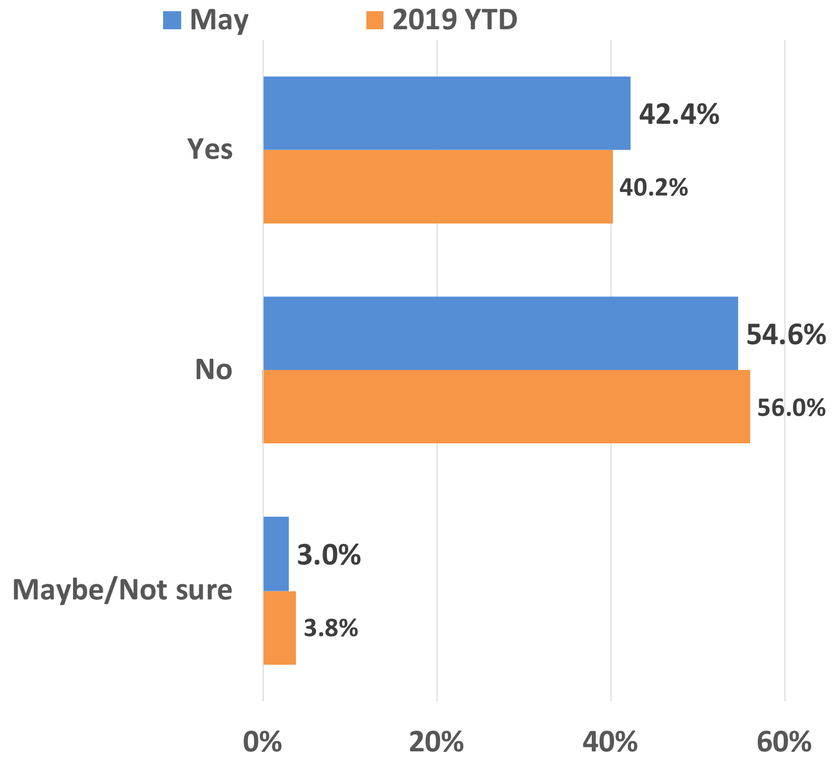
Experience Satisfaction / Earned & Paid Media Recall

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. 420 responses.

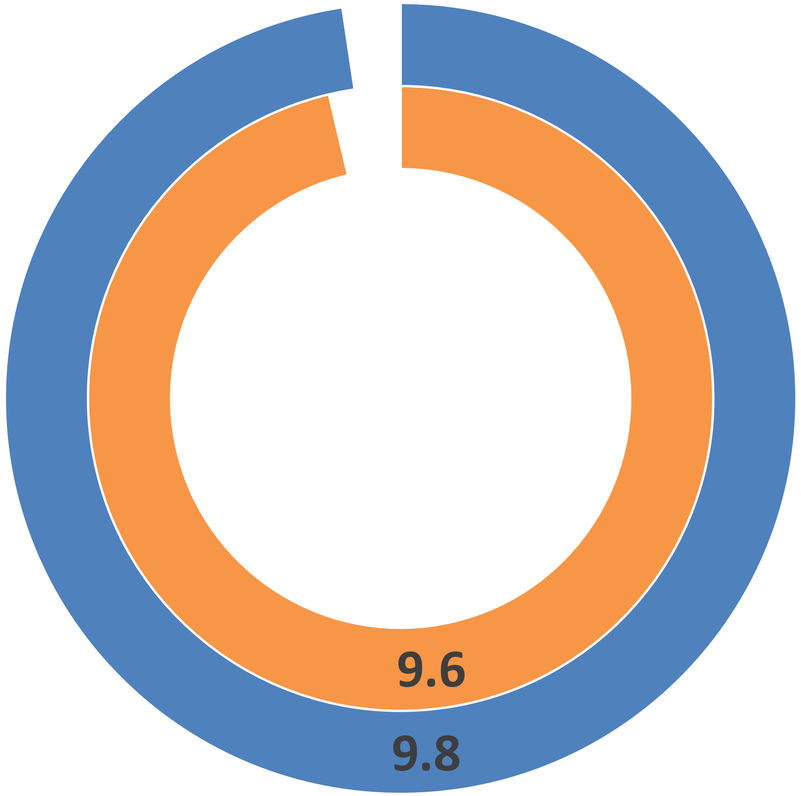
Chart: Media Recall



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. 406 responses.

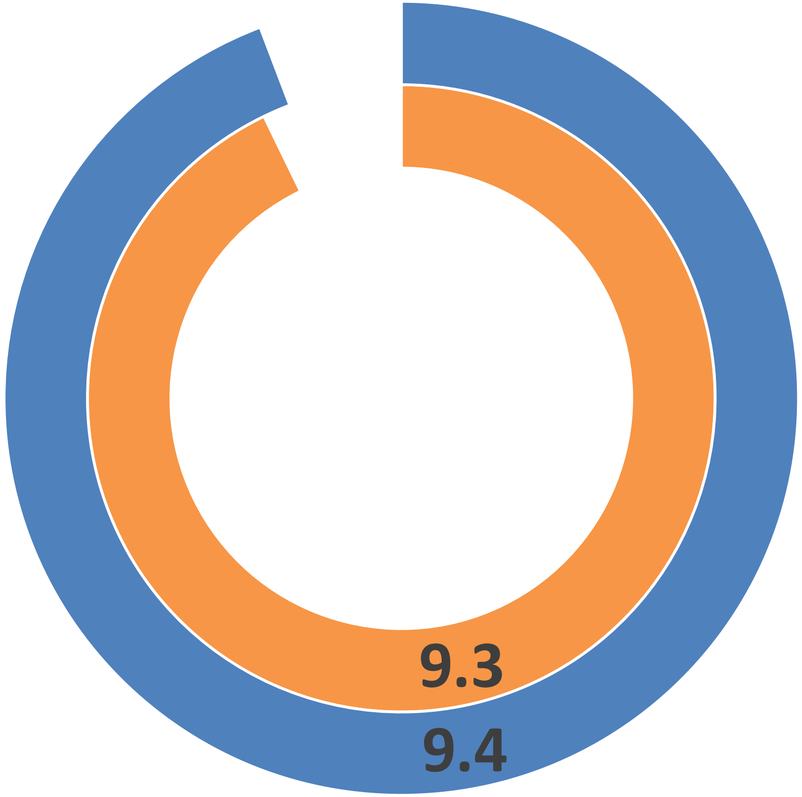
Likelihood to Recommend / Likelihood to Return

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. 421 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. 420 responses.