



## Visit St. Pete/Clearwater

### **VISITOR PROFILE STUDY**

Report of Findings  
February 2019



# TABLE OF CONTENTS

Overview & Methodology	3
Point of Origin & Demographic Profile	6
Top 10 Visitor Insights	9
Visitor Trip Details	10
Travel Planning and Satisfaction Metrics	22





# 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 February 2019.

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

In total, 431 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



*Destination Analysts' research staff at PIE airport.*



# 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:

- Beach Drive
- Clearwater Beach
- Clearwater Marine Aquarium
- John's Pass Village & Boardwalk
- Seminole City Center
- Shephard's Resort
- St. Petersburg-Clearwater International Airport
- St. Petersburg Saturday Morning Market
- Straub Park
- Sundial St. Pete
- The Dali Museum
- Wyndham Grand Clearwater Beach



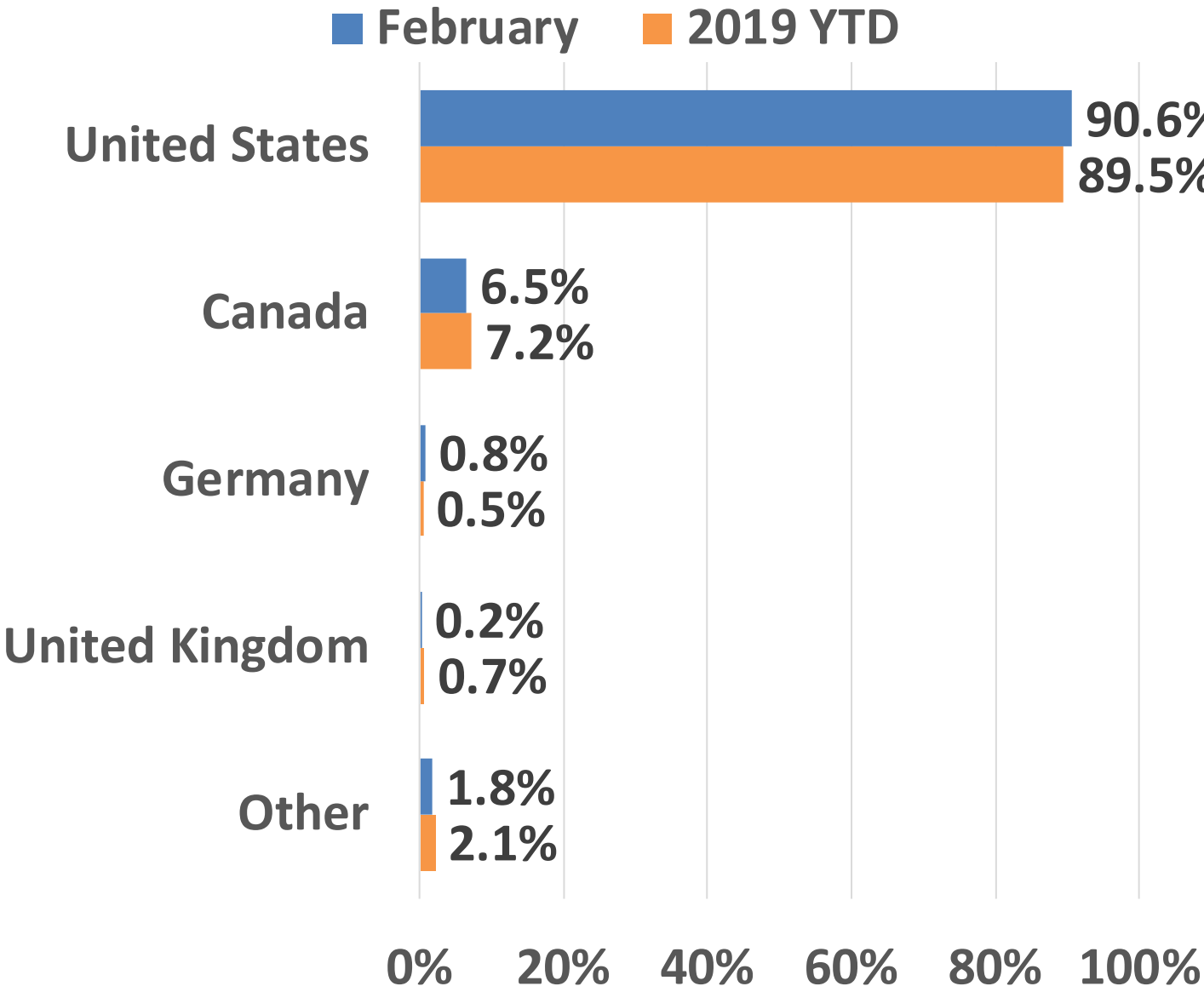
*Destination Analysts' research staff interviewing visitors at the St. Petersburg Saturday Morning Market.*

# POINT OF ORIGIN & DEMOGRAPHIC PROFILE



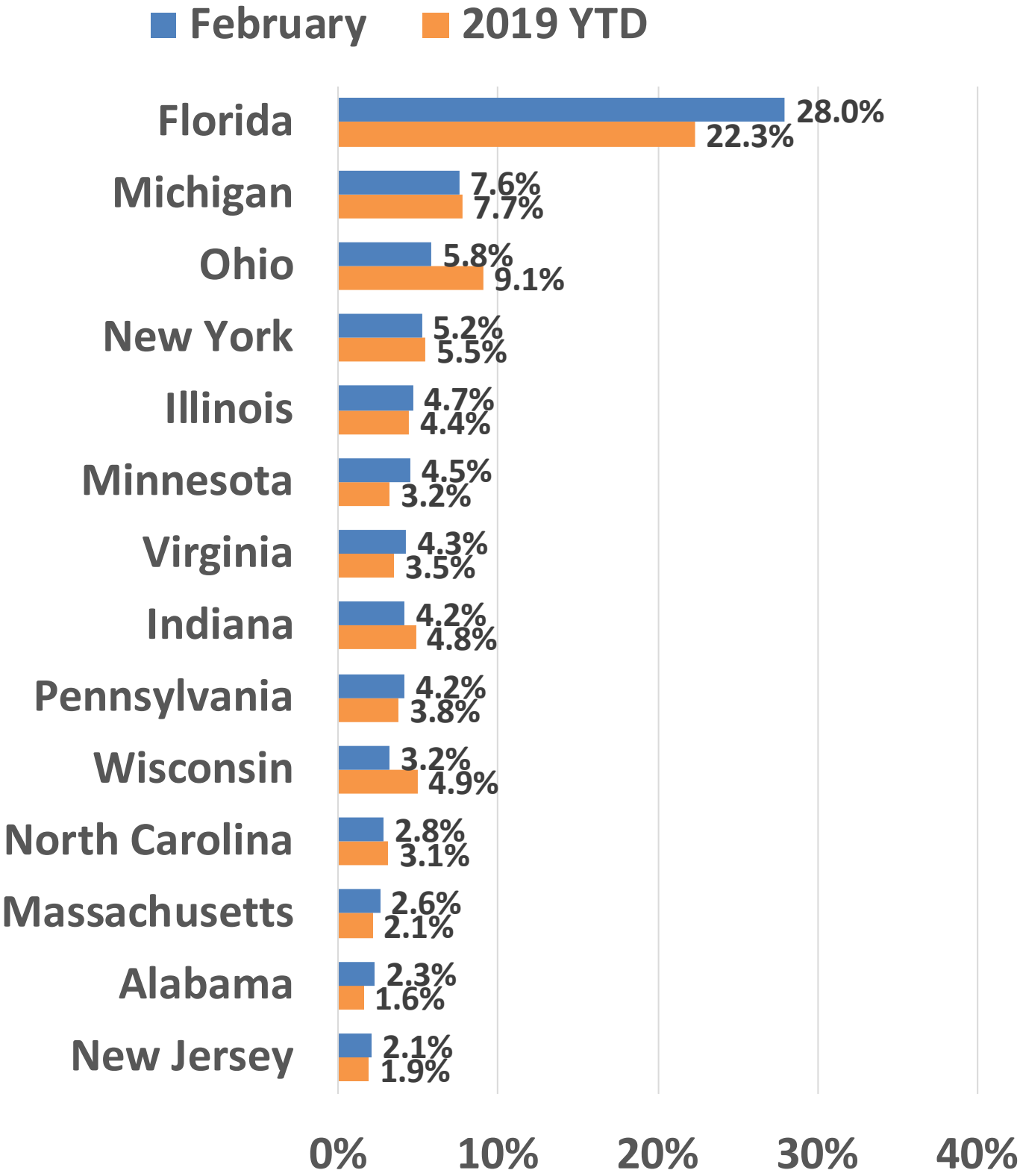
# Point Of Origin

Chart: Country of Origin



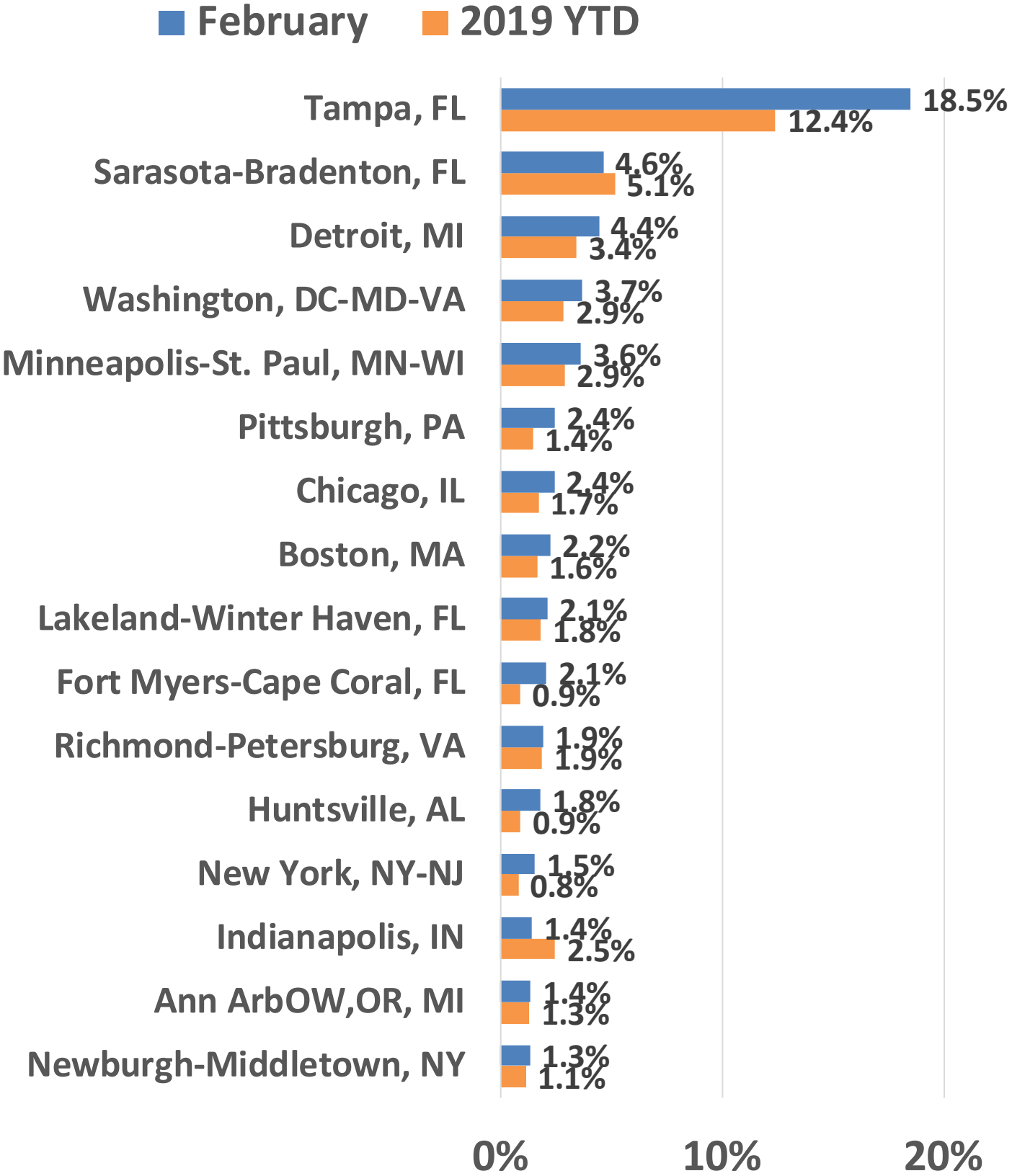
Question: In what country do you reside?  
Base: All Respondents. 431 responses.

Chart: State of Origin



Question: What is your zip/postal code?  
Base: Domestic respondents. 378 responses.

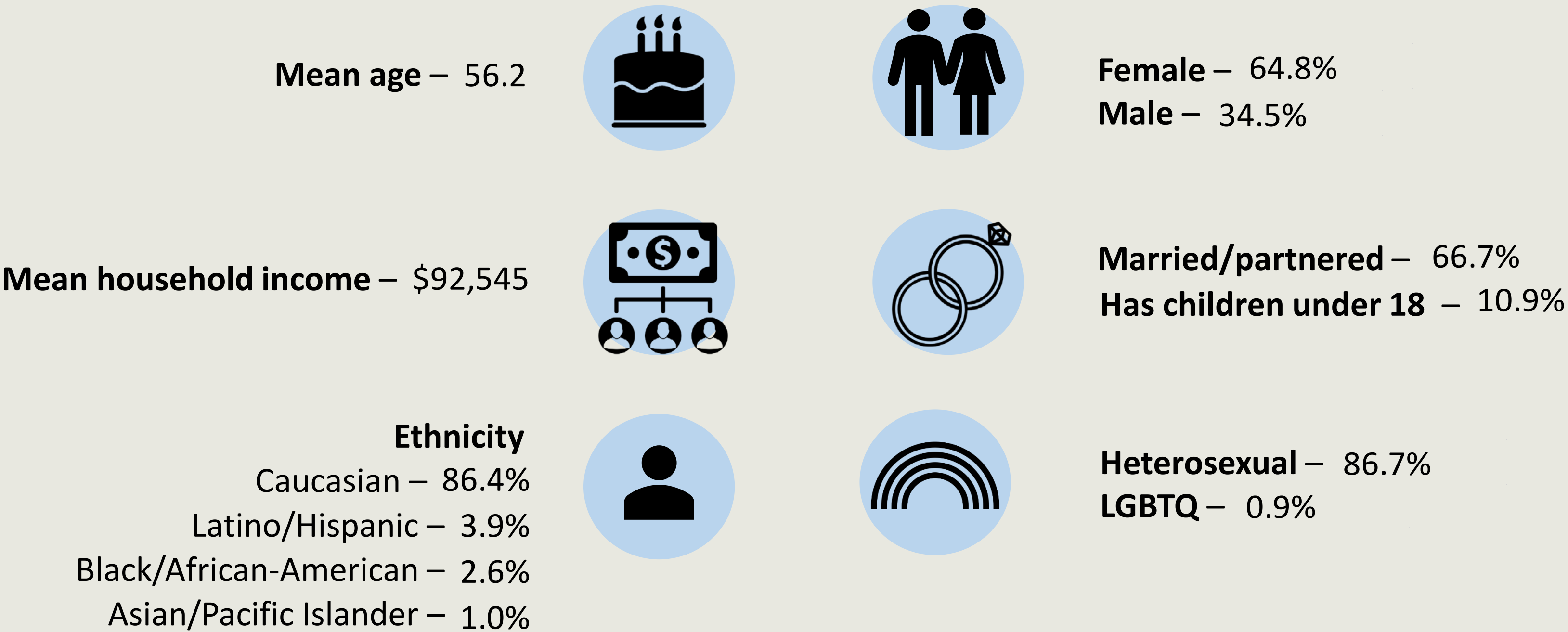
Chart: MSA of Origin



Question: What is your zip/postal code?  
Base: Domestic respondents. 324 responses.

# Demographic Profile

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





# TOP 10 VISITOR INSIGHTS

## FEBRUARY 2019

1. In February 2019, the top domestic visitor markets represented were **Tampa, FL (18.5%)** and **Sarasota-Bradenton, FL (4.6%)**. Outside of Florida, the top domestic visitor markets were **Detroit, MI (4.4%)**, **Washington, DC (3.7%)** and **Minneapolis-St. Paul, MN (3.6%)**.
2. About **one-in-ten** survey respondents were **international** residents (9.4%), with **Canada (6.5%)** being the top international market.
3. Nearly three-quarters of domestic survey respondents were **out of state residents (72.0%)**, with the largest representation from **Michigan (7.6%)** residents.
4. Visitors averaged **6.8 past trips** to the St. Pete/Clearwater area, with **22.0 percent** who were visiting for the **first time**.
5. The typical travel party included **3.1 people**. In total, **12.7 percent** of travel groups surveyed **included children under 18**.
6. On average, February 2019 visitors stayed **5.1 days** in the St. Pete/Clearwater area, spending an average of **\$98.45 per person, per day**.
7. About half of visitors surveyed arrived in the area by **airline (49.1%)**. Of this group, about 60 percent flew into Tampa International Airport (59.9%), while one-quarter flew into St. Pete/Clearwater International airport (23.2%). Meanwhile, **53.1 percent arrived via personal automobile**.
8. Nearly all visitors surveyed (99.6%) said they were **“satisfied” (9.7%)** or **“very satisfied” (89.9%)** with their experience in the St. Pete/Clearwater area.
9. Visitors rated their **likelihood to recommend** the area to other travelers an average of **9.6 out of 10**. Visitors rated their **likelihood to return** to St. Pete/Clearwater an average of **9.2 out of 10**.
10. In total, **36.9 percent** of February 2019 visitors surveyed **recalled reading, seeing or hearing paid or earned media** for the St. Pete/Clearwater area in the past six months.

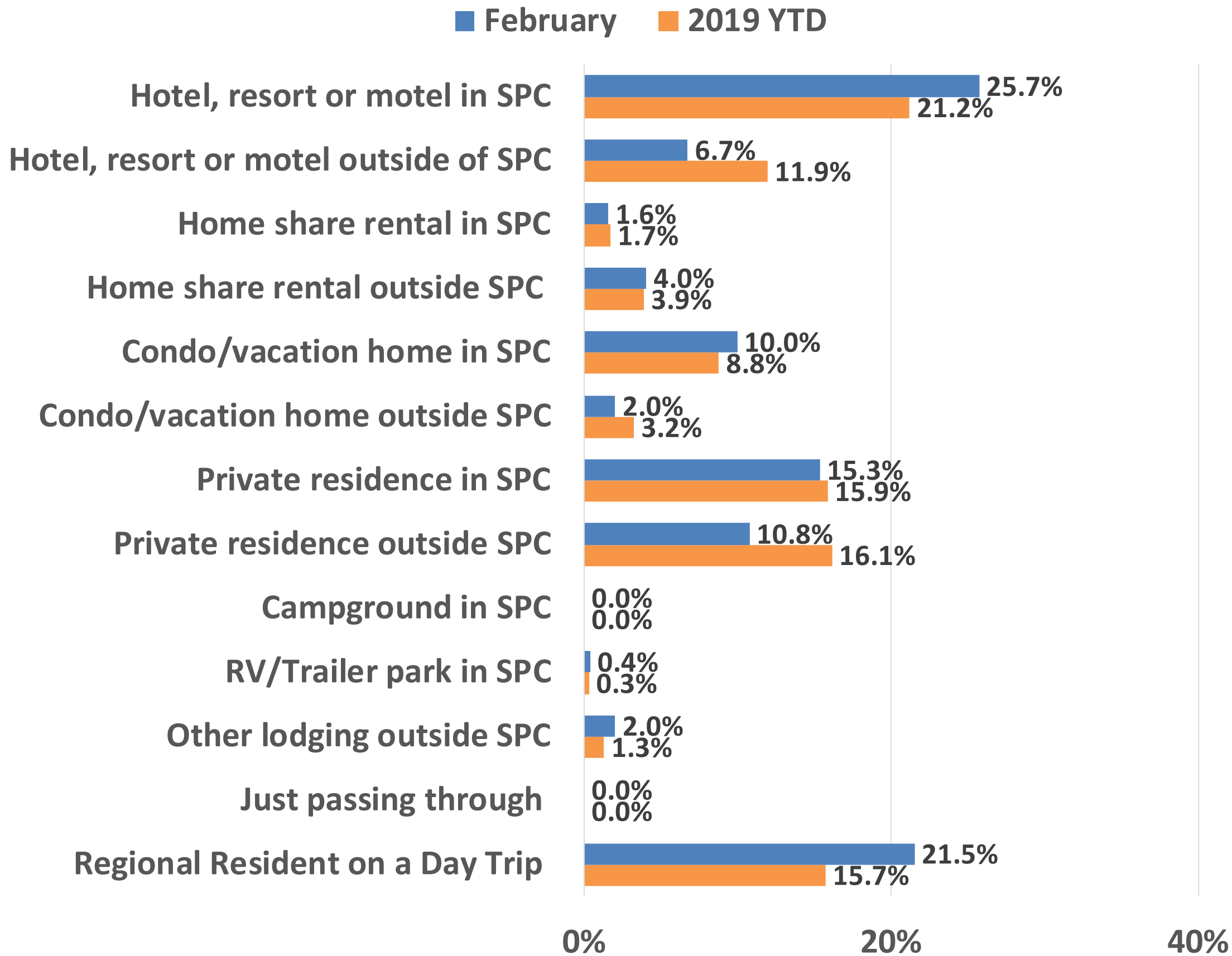


# VISITOR TRIP DETAILS



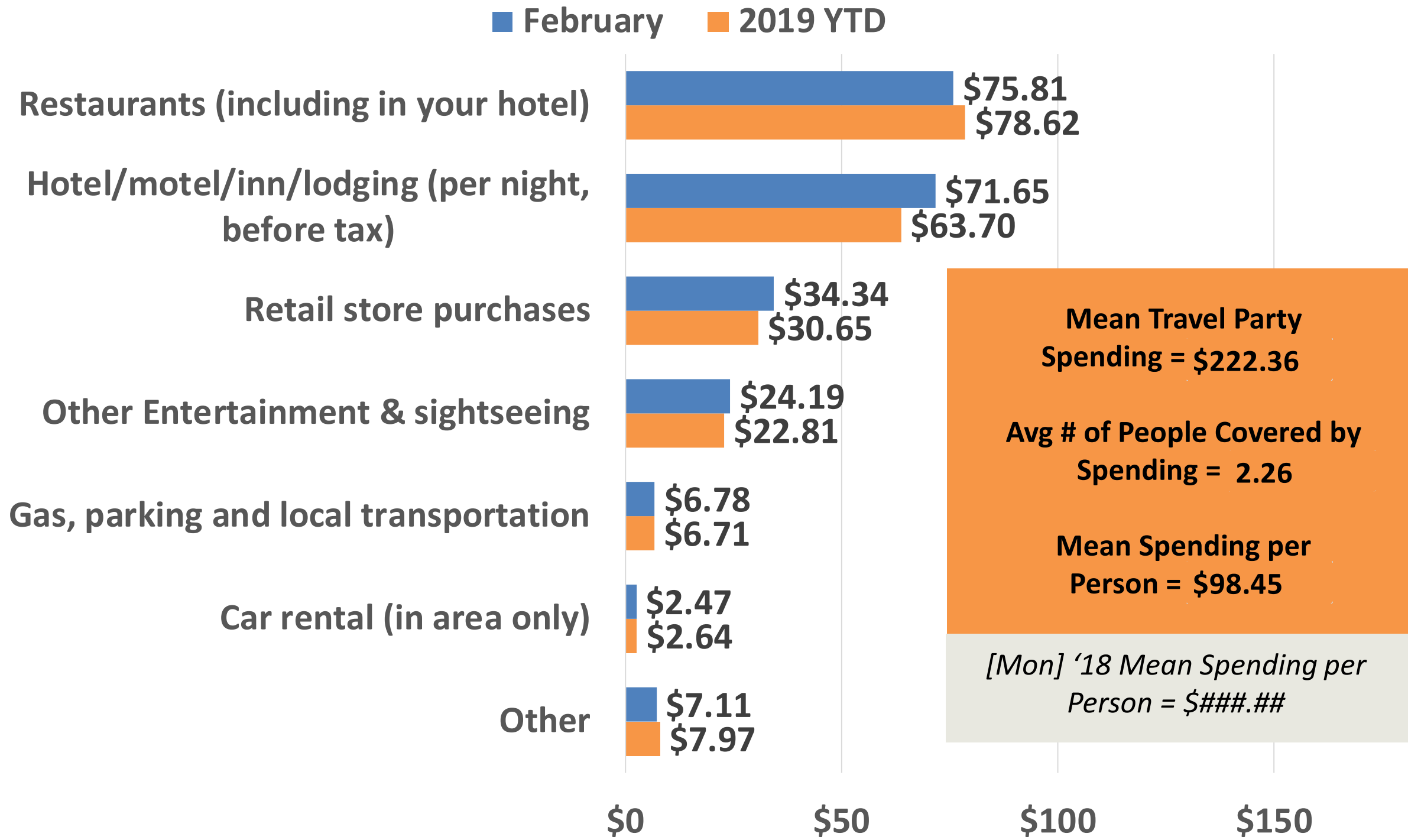
# Lodging Type / Daily Spending In-Market

Chart: Type of Lodging



Question: Where are you staying overnight on this trip to the St. Pete/Clearwater area? (Select one)  
Base: All Respondents. 431 responses.

Chart: Per Day Travel Party Spending

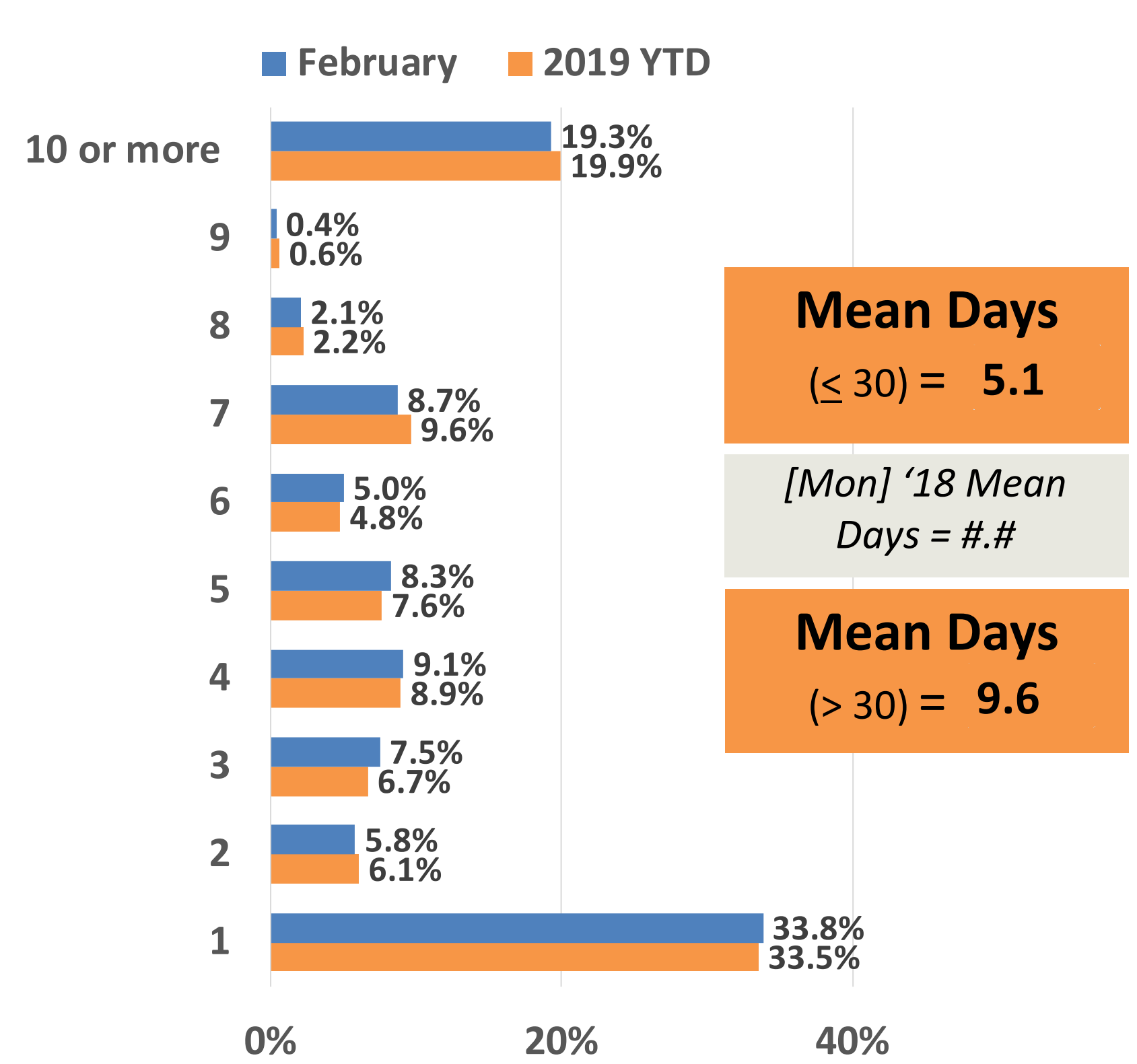


Question: Approximately how much will you spend on each of the following while in the St. Petersburg/Clearwater area? Base: All Respondents. 410 responses.



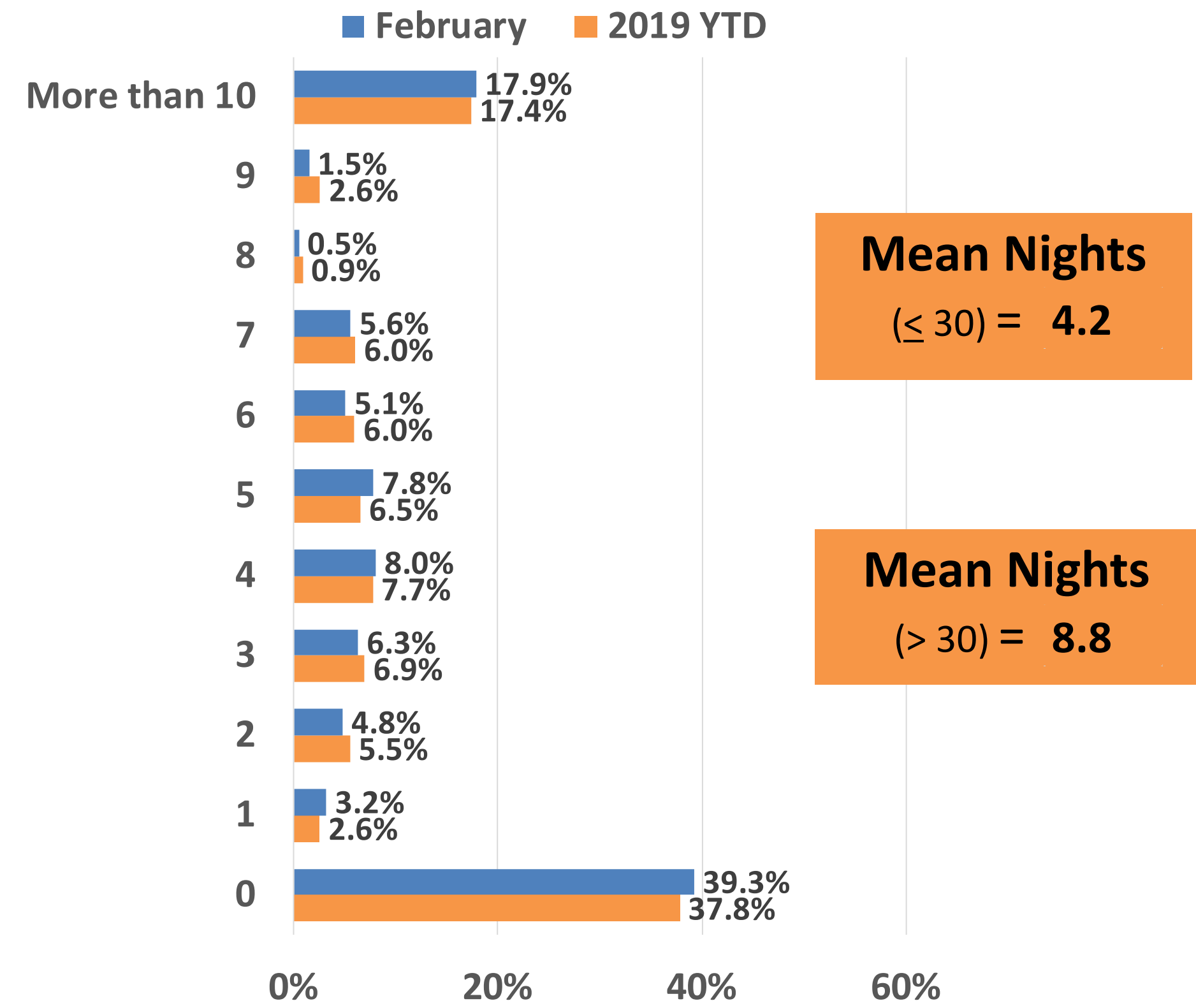
# Days & Nights in St. Pete/Clearwater

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. 399 responses.

Chart: Nights in Market

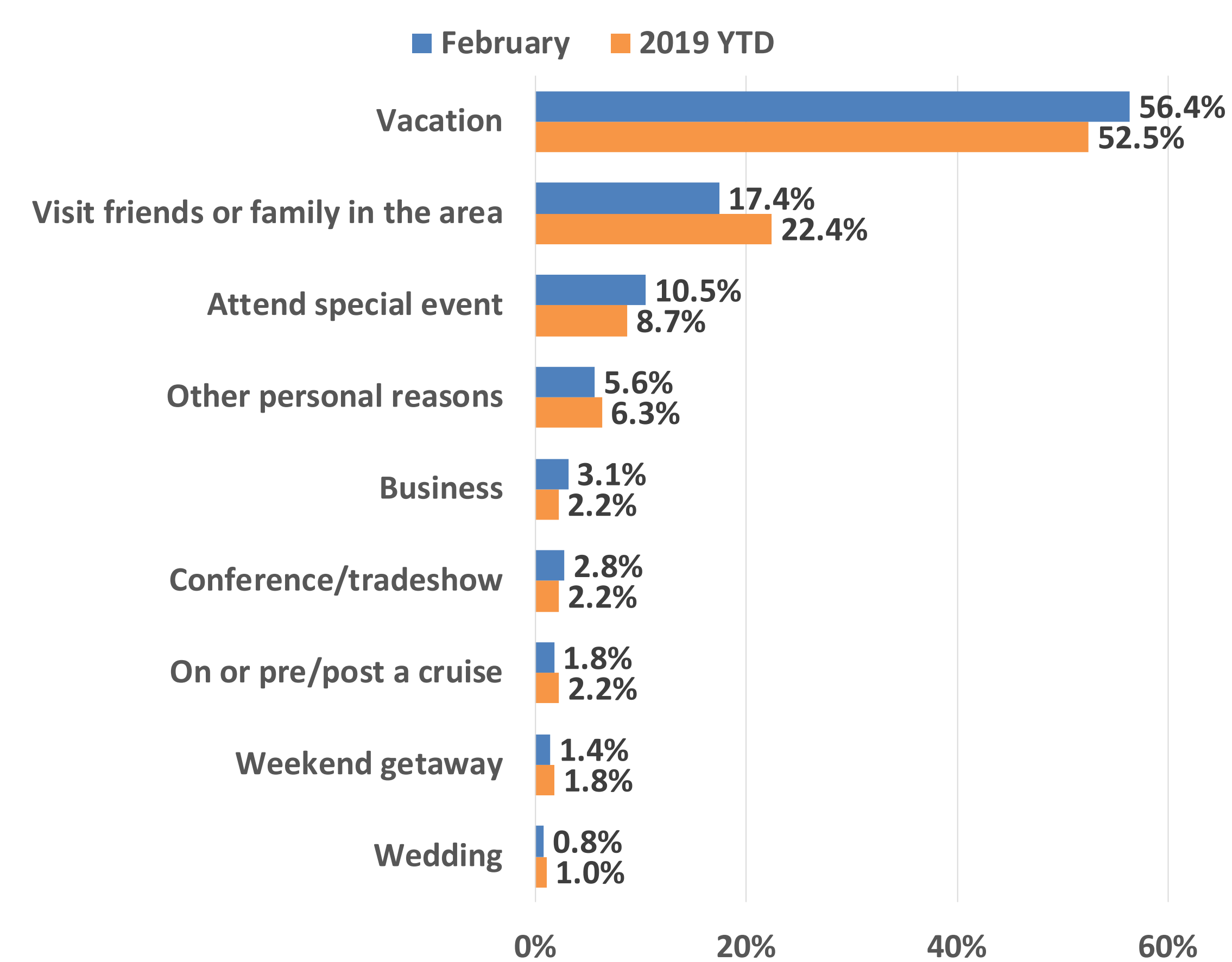


Question: How many total days and nights did you, or will you, stay in the St. Petersburg/Clearwater area on this trip?  
Base: All Respondents. 399 responses.



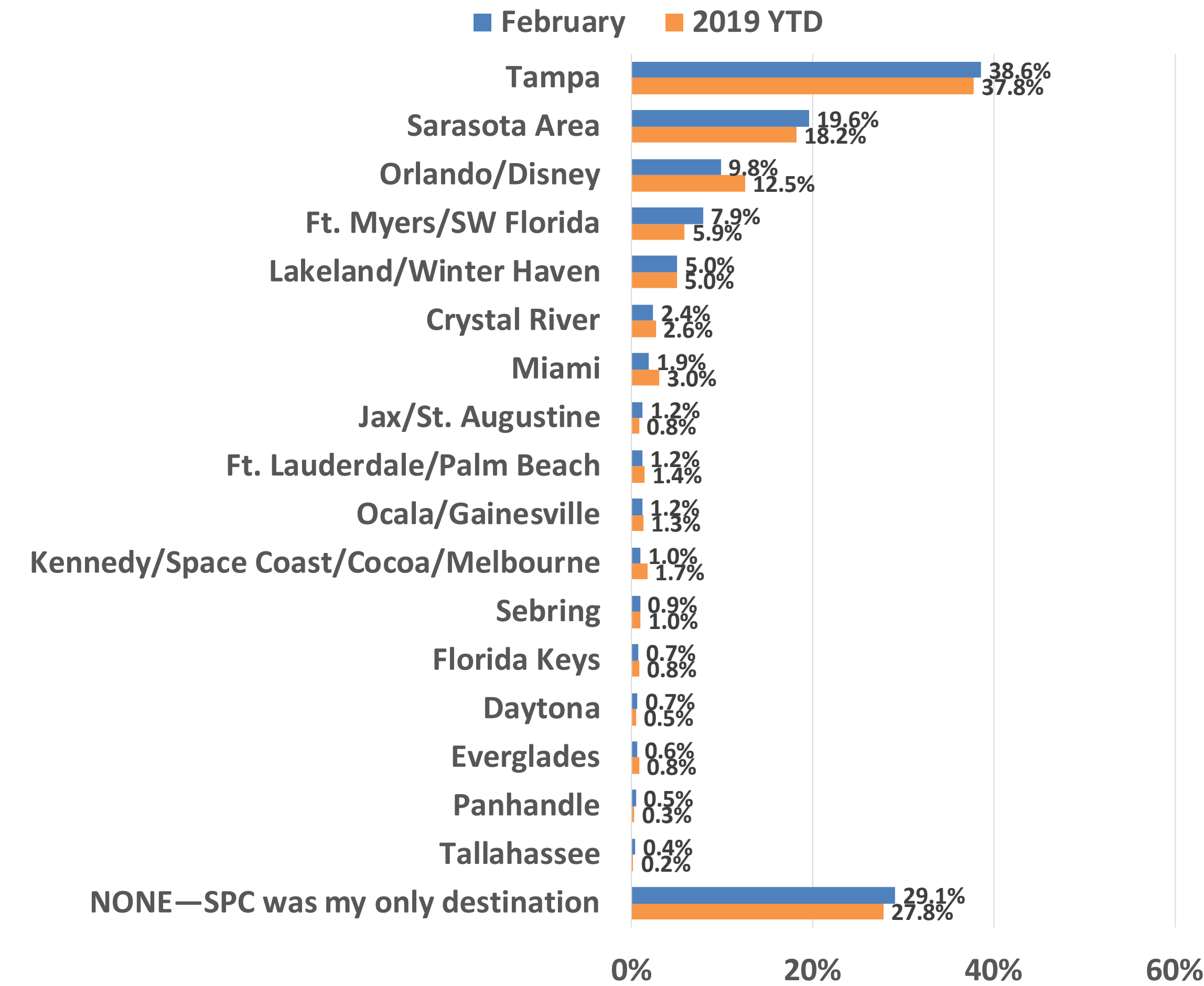
# Primary Reason for Visit / Other Destinations Visited

Chart: Primary Reason for Visit



Question: What is your primary reason for visiting the St. Pete/Clearwater Area? (Select one)  
Base: All Respondents. 390 responses.

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

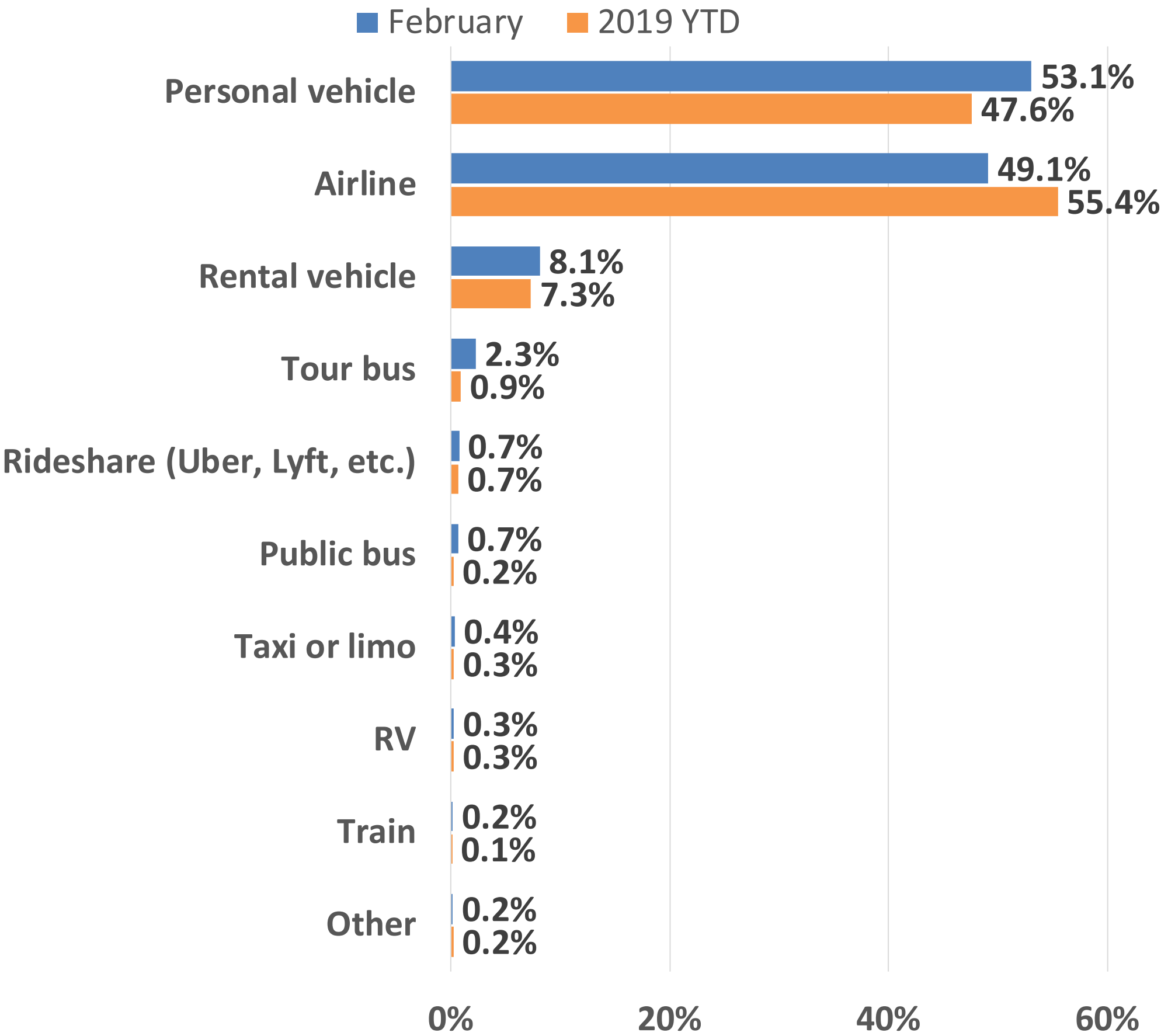


Question: Which of these other destinations did you visit while on this trip? (Show list. Select all that apply) Base: All Respondents. 431 responses.



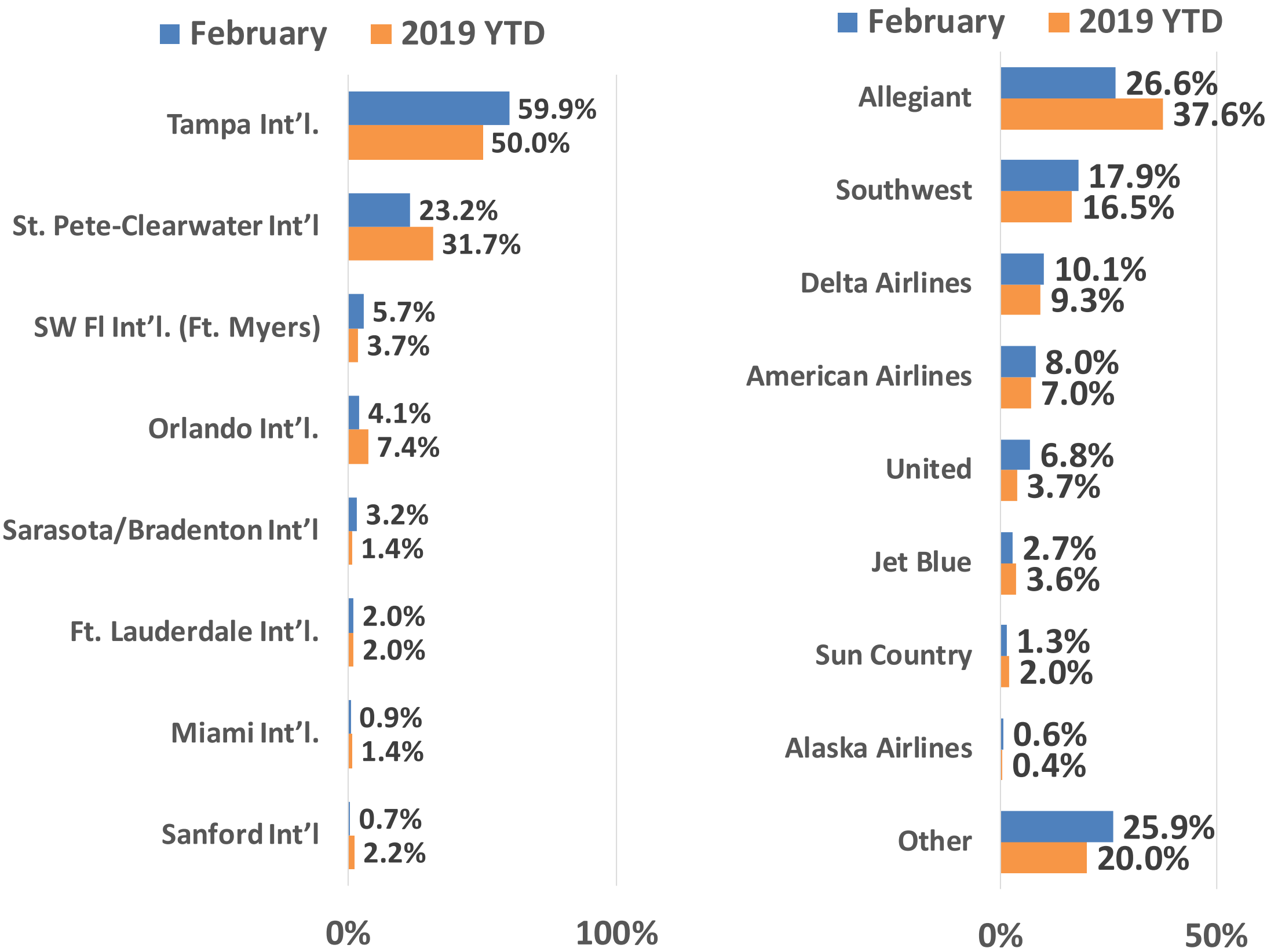
# Method of Arrival / Arrival Airport & Airline

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. 431 responses.

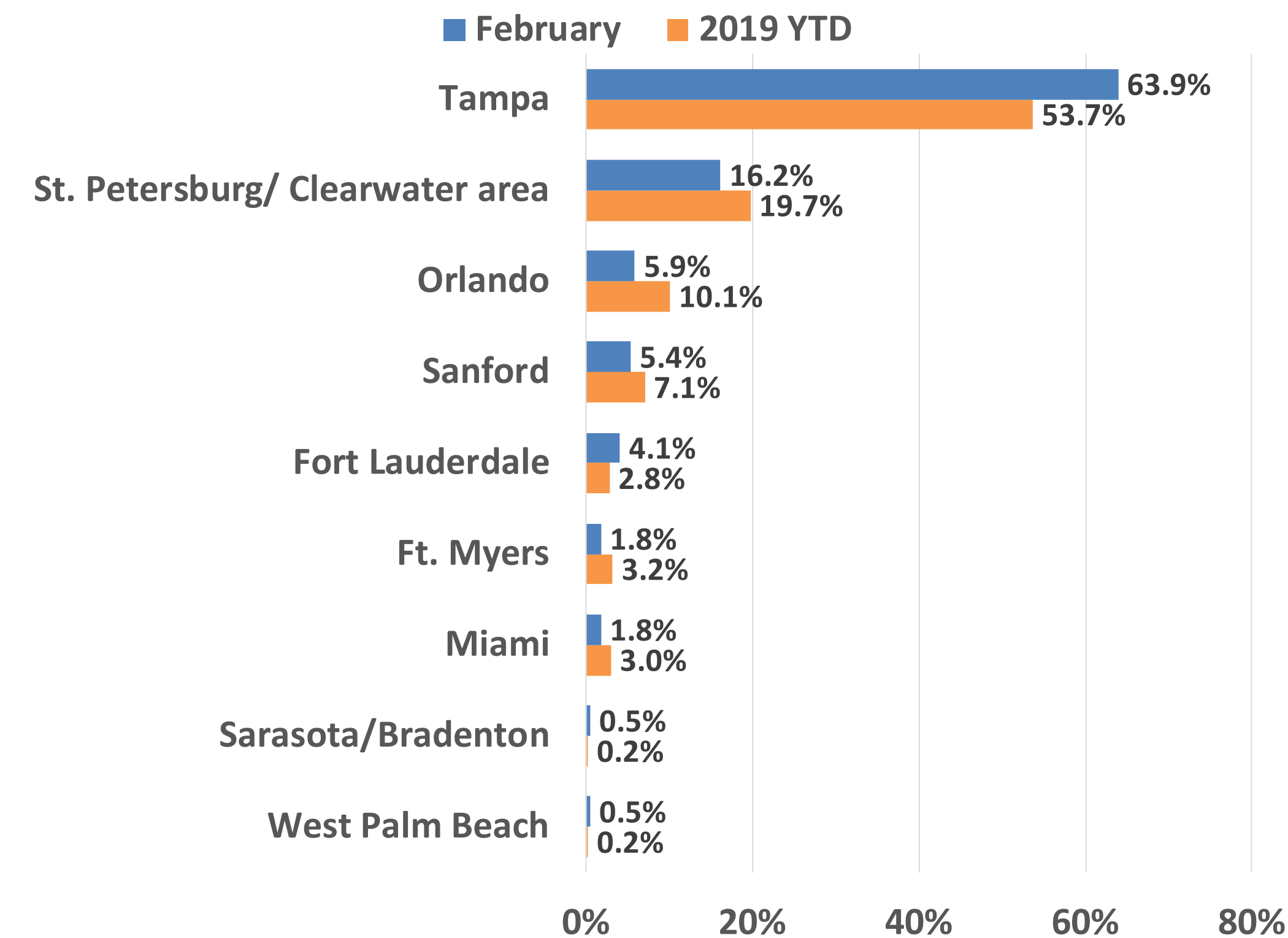
Charts: Airport of Arrival and Airline Used



Question: At which airport did you arrive into the area? Which airline did you use? Base: Respondents who arrived by Airline. 212 responses.

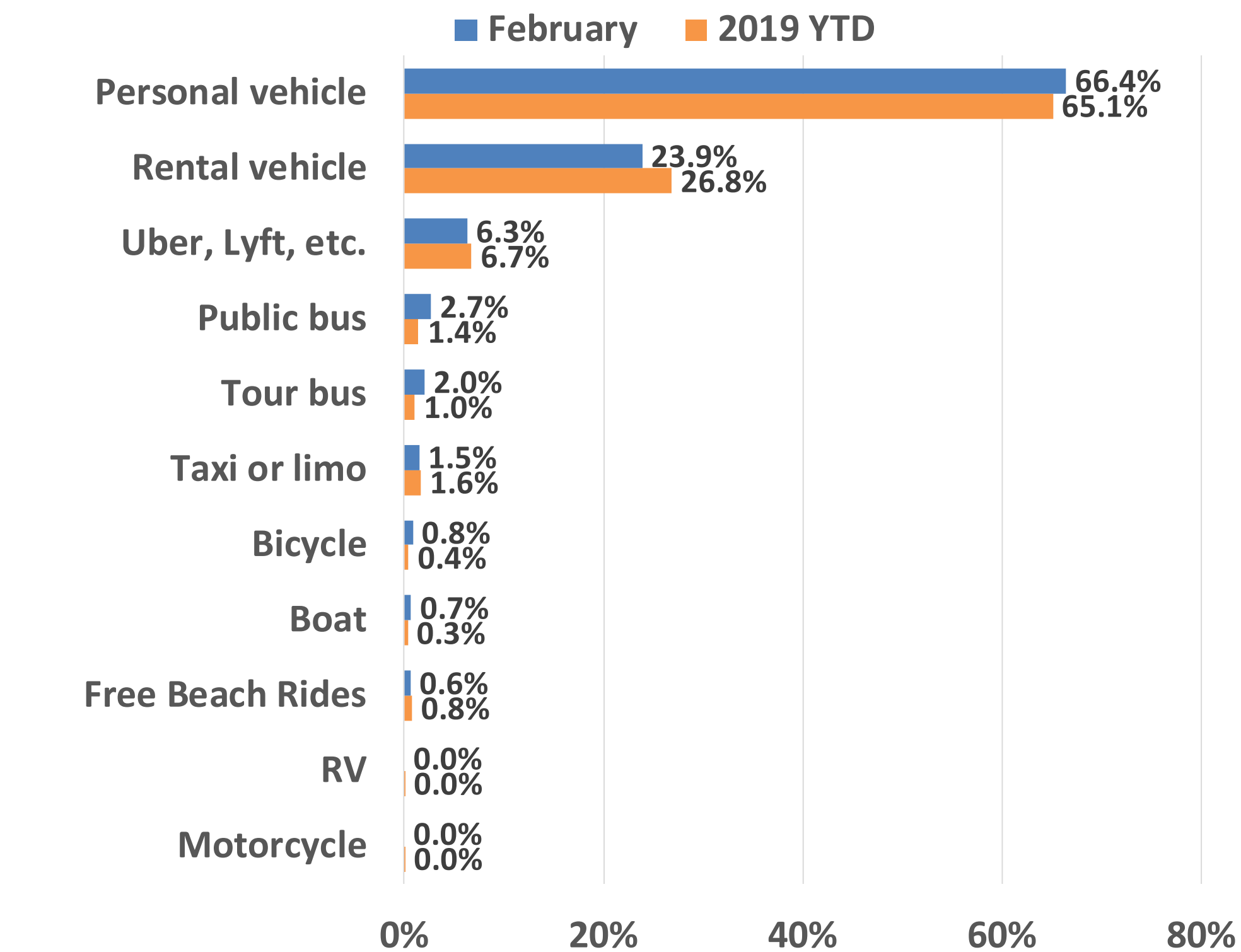
# Rental Vehicle Pick-Up City / Transportation Used In-Market

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. 103 responses.

Chart: Transportation Used In-Market

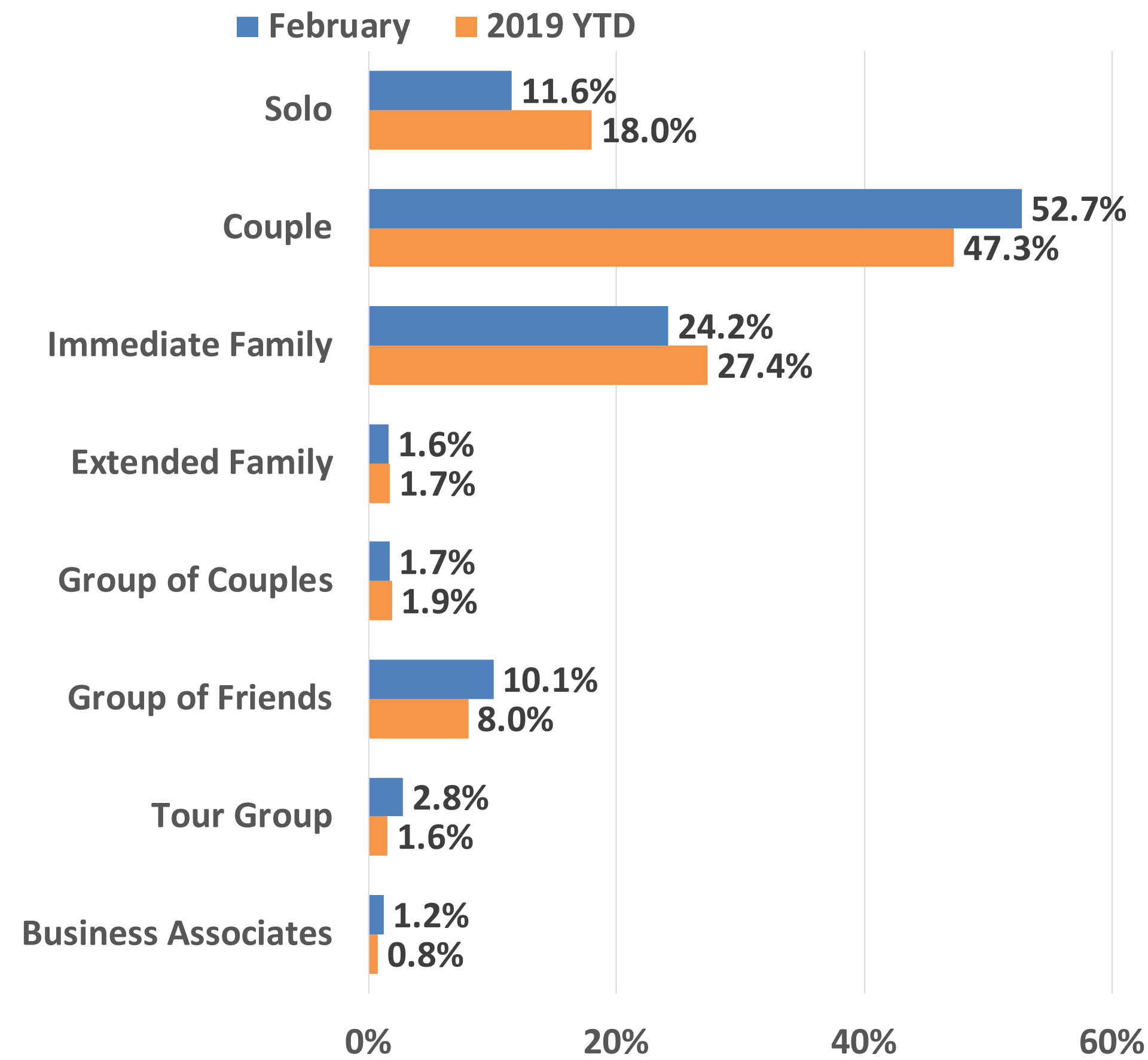


Question: Which modes of transportation did you, or will you, use while in the St. Petersburg/ Clearwater area? (Select all that apply) Base: All Respondents. 431 responses.



# 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. 431 responses.

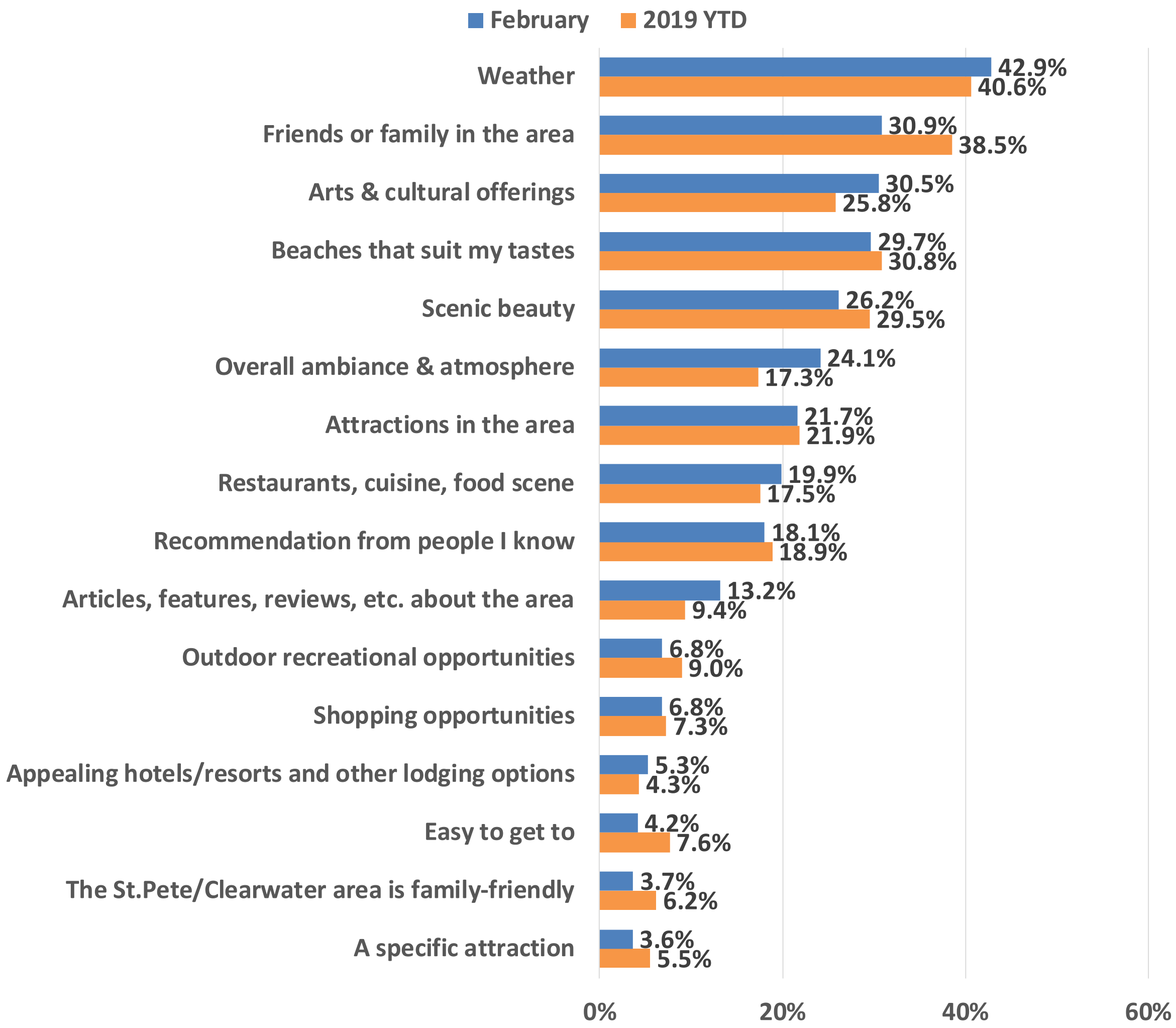
Chart: Travel Party Size

	February	2019 YTD
Male adults (18 yrs. +)	1.25	1.08
Female adults (18 yrs. +)	1.62	1.45
Male children (0 to 17 yrs.)	0.14	0.15
Female children (0 to 17 yrs.)	0.10	0.16
Average Travel Party Size	3.1	2.8
Percent with children in party	12.7%	15.2%

Question: How many people of each type are in your immediate travel party, including yourself?  
Base: All Respondents. 431 responses.

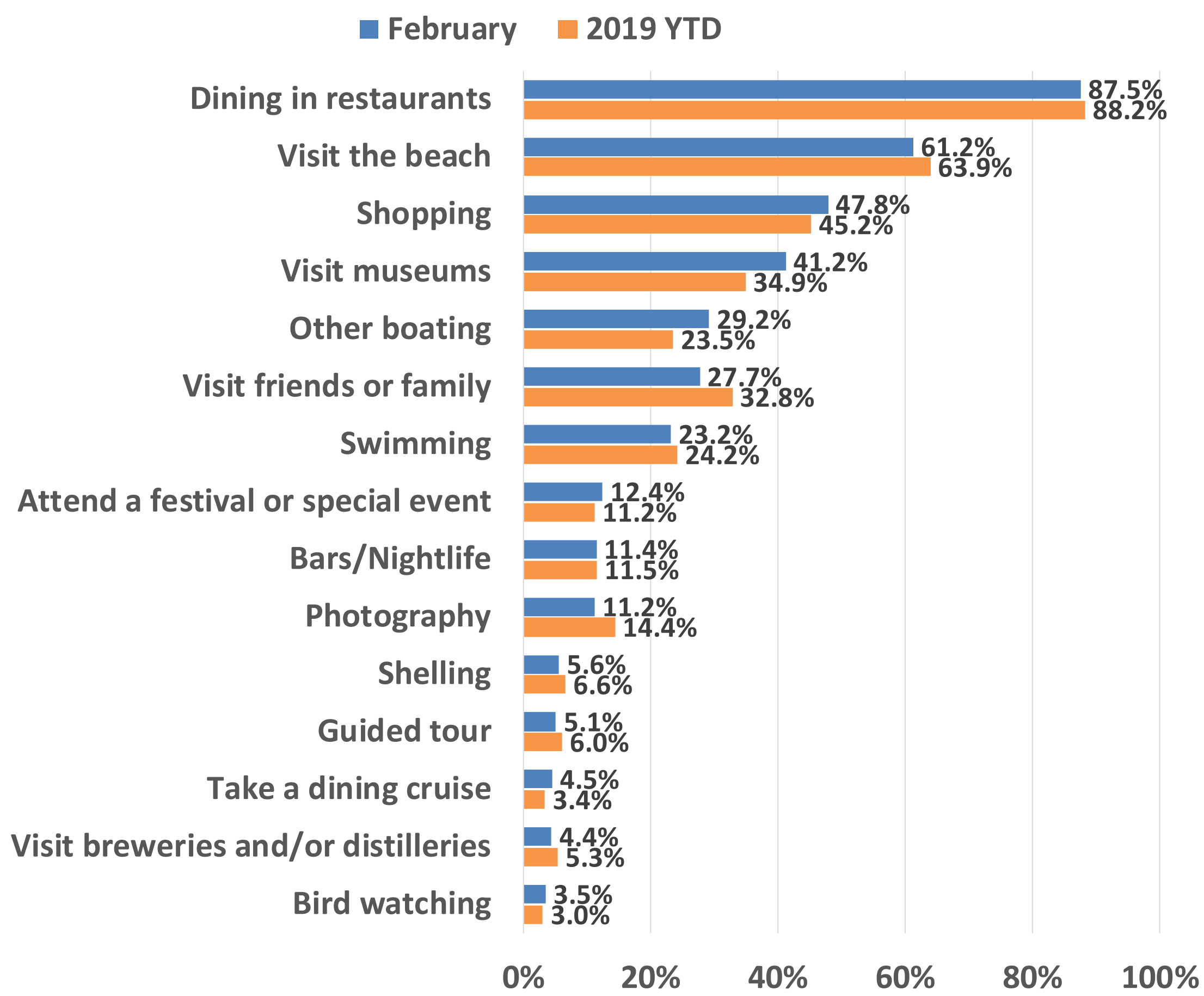
# Important Factors to Destination Decision / Trip Activities

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. 408 responses.

Chart: Trip Activities

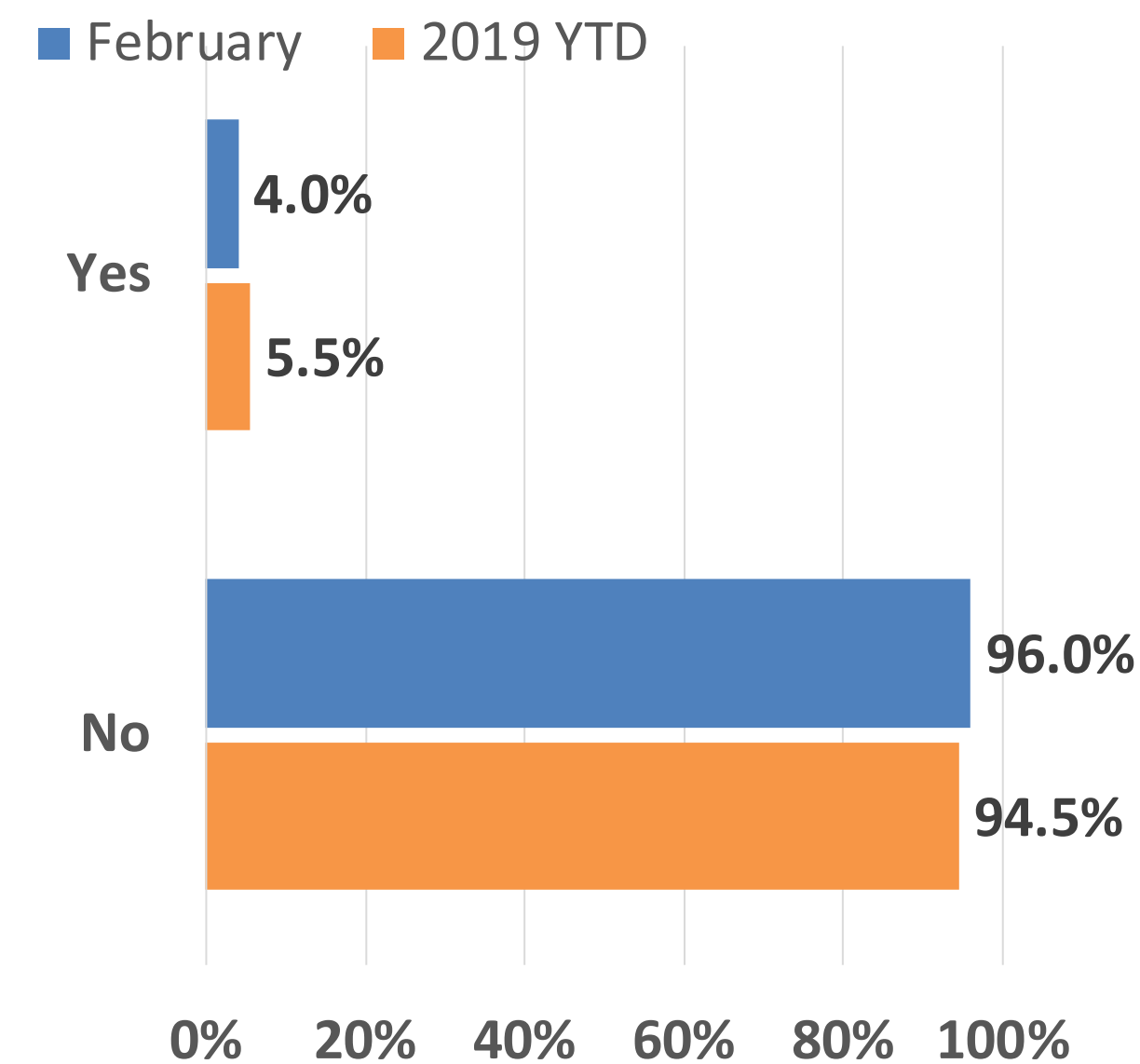


Question: Which of these activities did you, or will you, participate in while in the St. Pete/Clearwater area? (Select all that apply) Base: All Respondents. 431 responses.



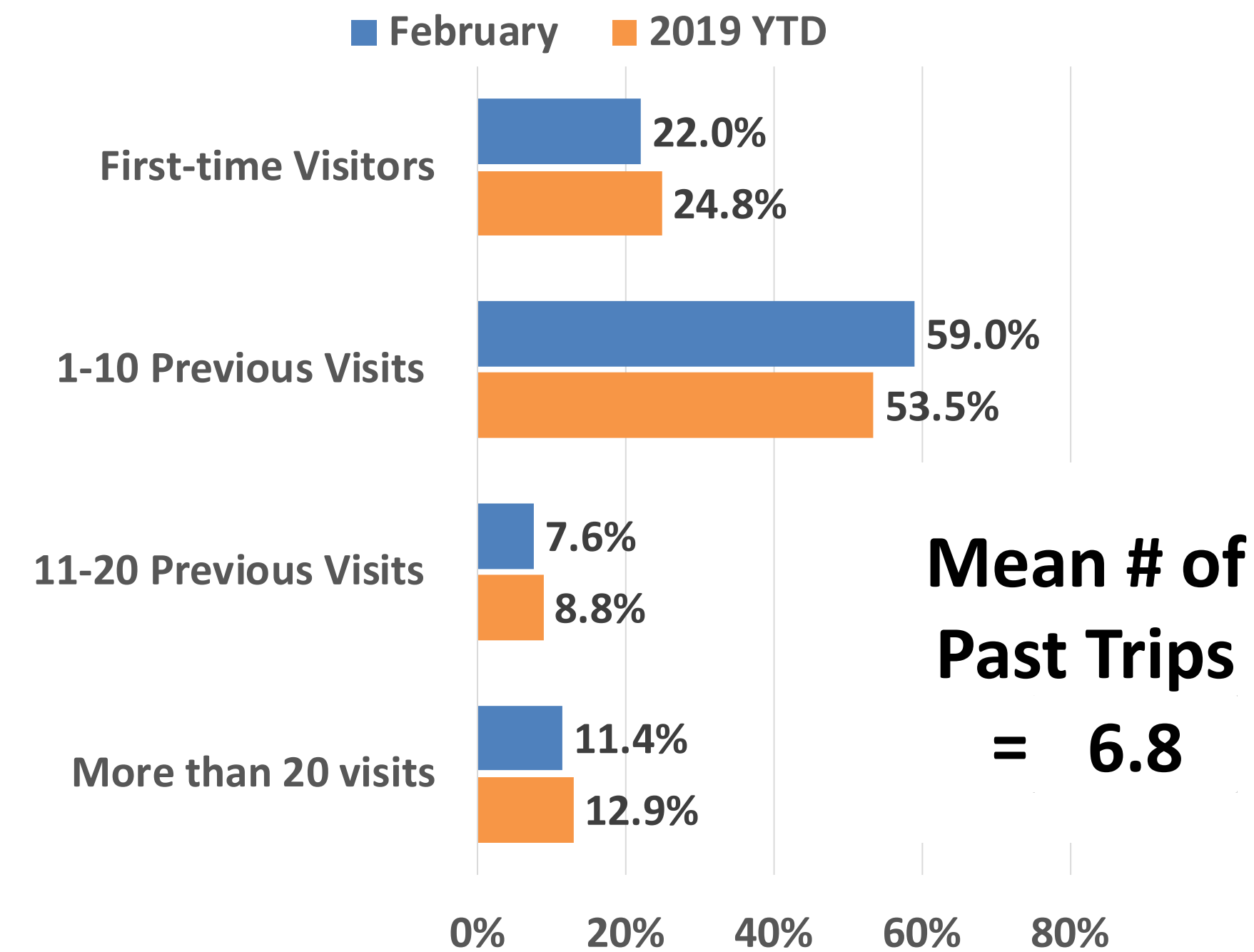
# First-Time Visit to Florida / Previous Visitation to St. Pete/Clearwater

Chart: First Time Visitors to Florida



Question: Is this your first visit to Florida?  
Base: All Respondents. 429 responses.

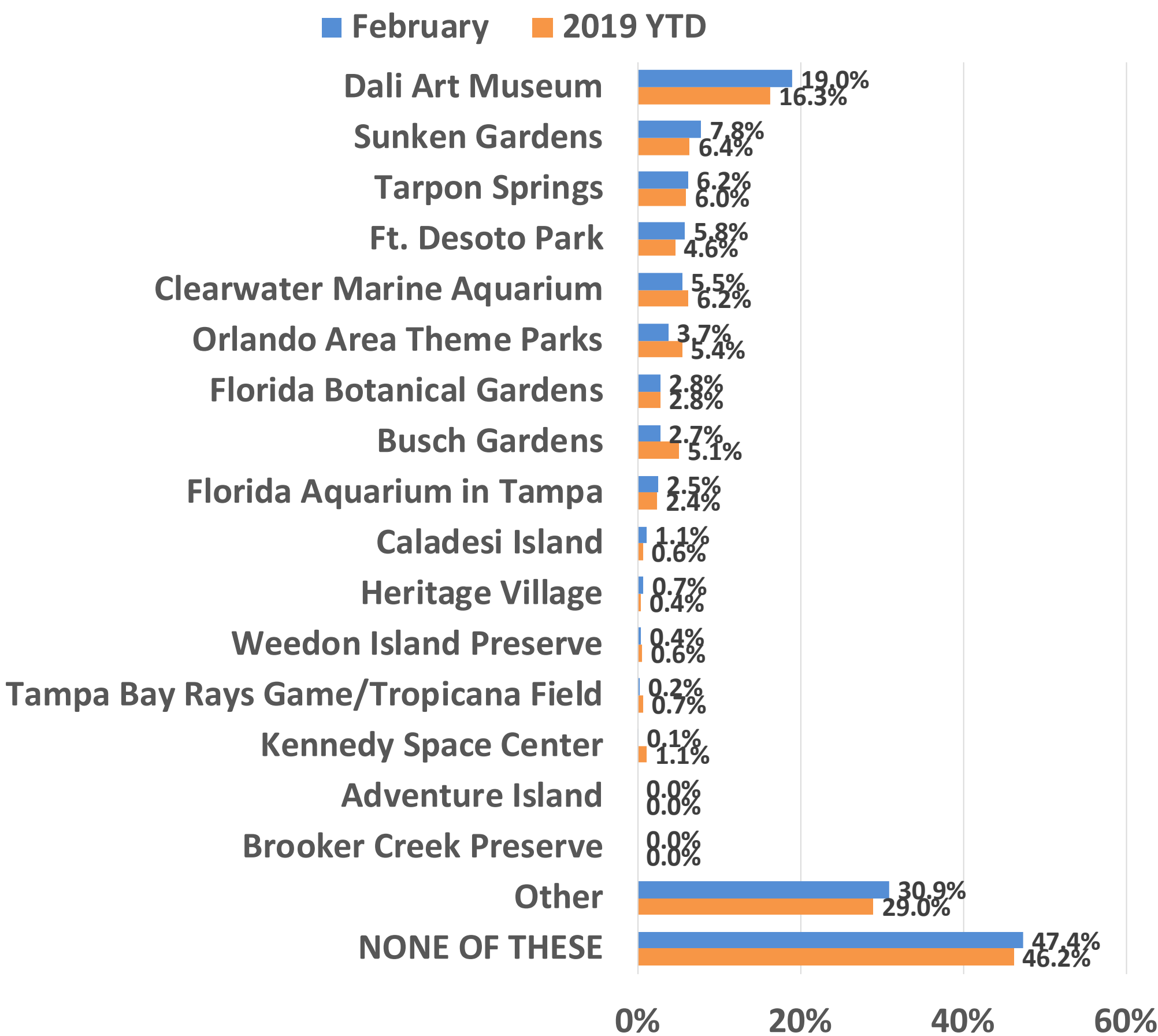
Chart: Previous Visitation to the St. Pete/Clearwater Area



Question: Prior to this visit, how many times have you been to the St. Petersburg/Clearwater area?  
Base: All Respondents. 427 responses.

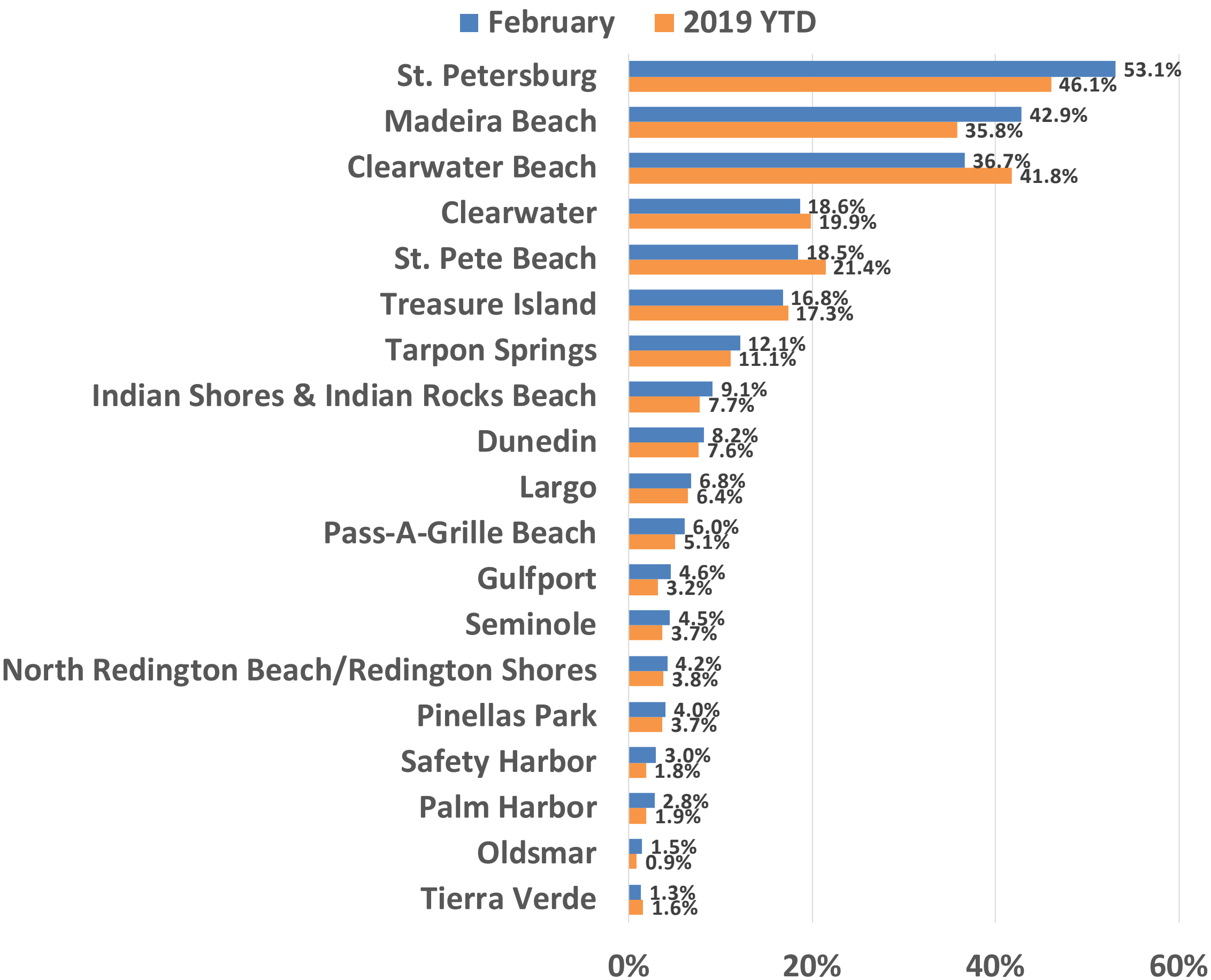
# Attractions Visited / Communities Visited

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. 427 responses.

Chart: Communities Visited

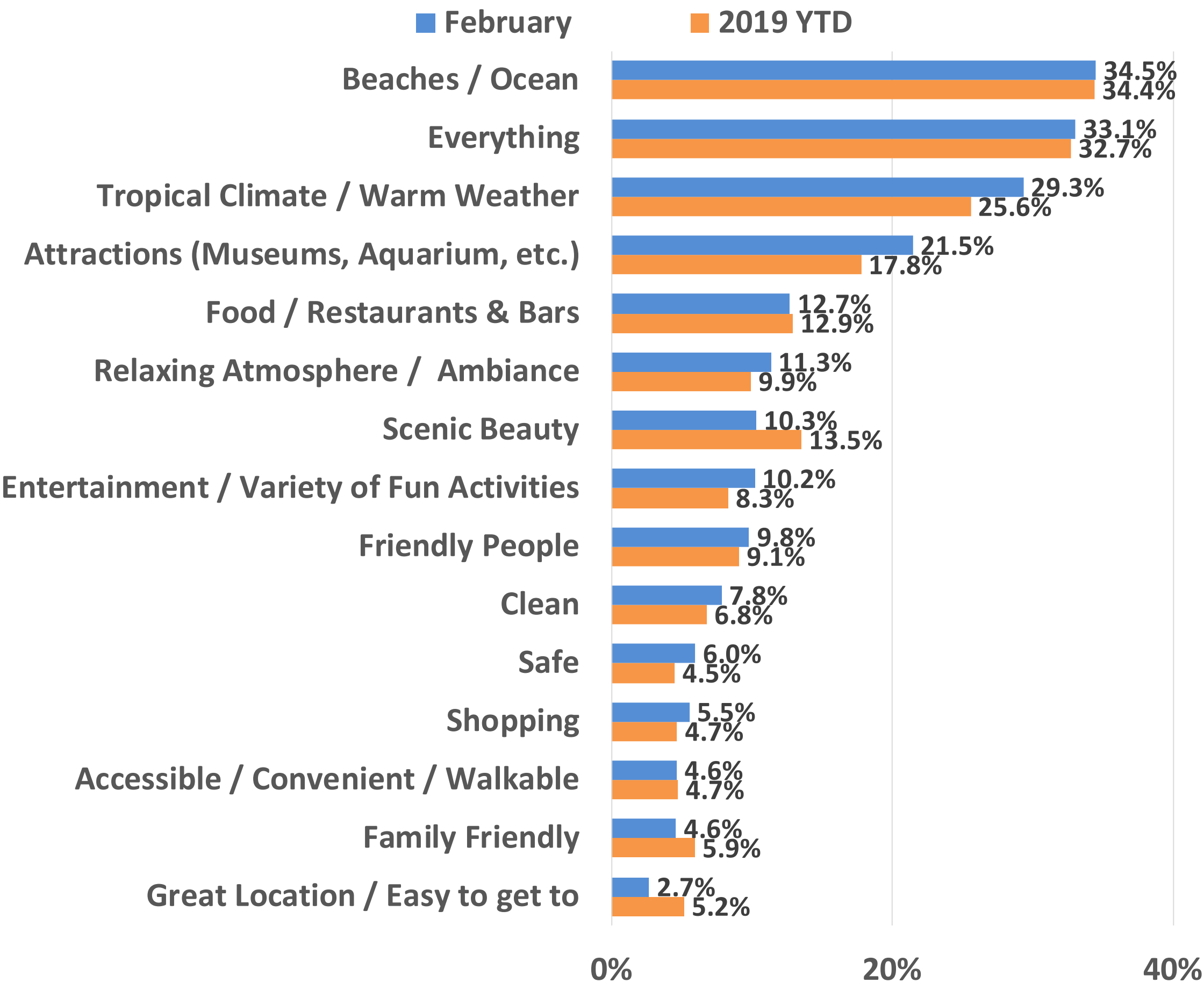


Question: Which of the following communities in the St. Pete/Clearwater area did you visit? (Show list. Select all that apply) Base: All Respondents. 431 responses.



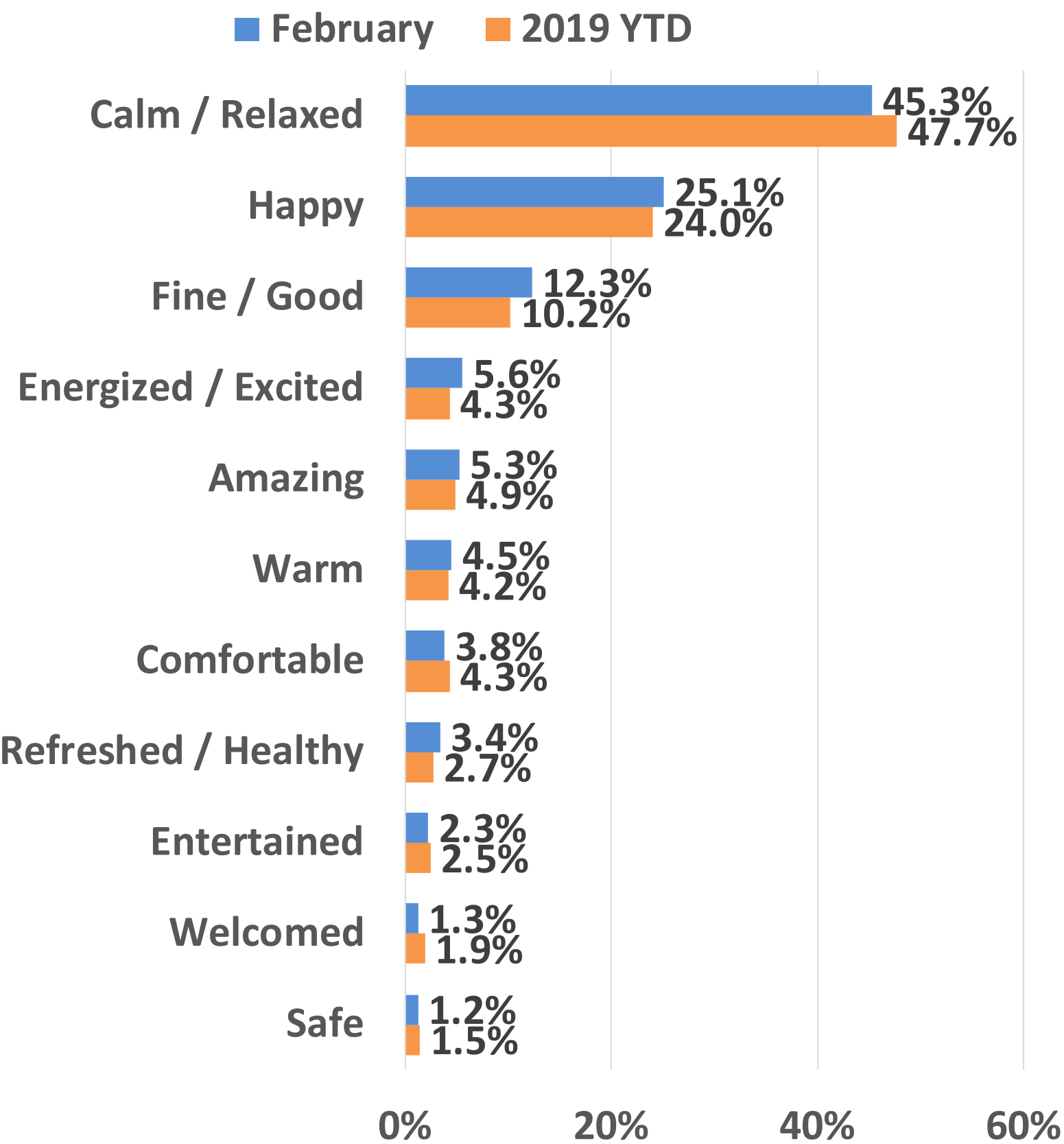
# Most Liked Aspect / Feelings in St. Pete-Clearwater

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



Question: What do you like most about the St. Petersburg/Clearwater area?  
Base: All Respondents. 430 responses.

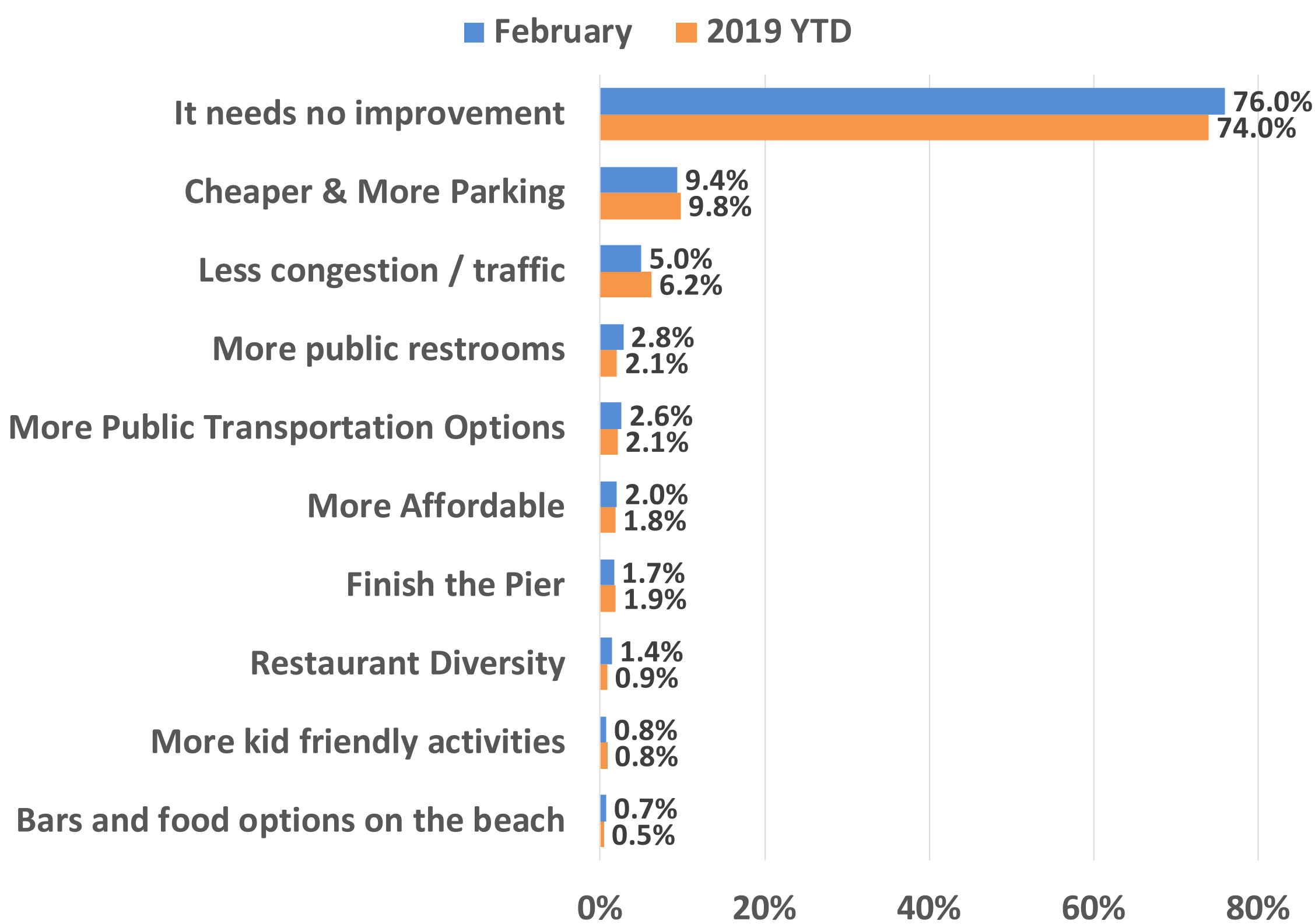
Chart: Feelings in St. Pete/Clearwater Area (Unaided)



Question: What one word or phrase best describes how you feel in the St. Petersburg/Clearwater area? Base: Respondents. 416 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. 420 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



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. 428 responses.

Chart: Resources Used before Arrival and While In Market

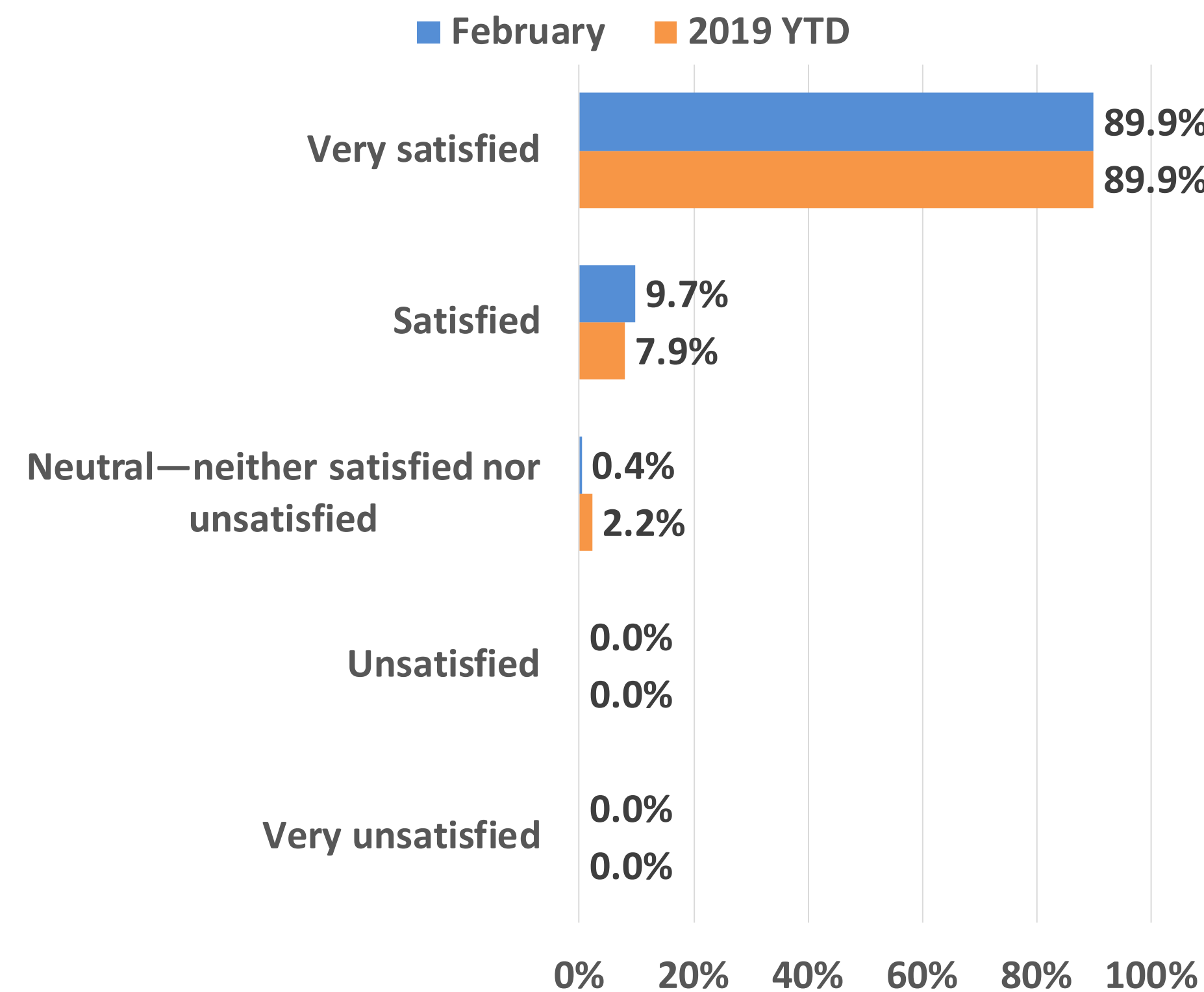
	Used Before Arrival	Used In Market
User-generated content/Review websites, such as Yelp and TripAdvisor	57.9%	51.9%
Online travel agencies (Expedia, Travelocity, etc.)	52.0%	26.0%
Opinions of friends or relatives	29.8%	24.7%
Social Media content	19.7%	18.3%
Official St. Petersburg/Clearwater area tourism website, <a href="http://www.VisitStPeteClearwater.com">www.VisitStPeteClearwater.com</a>	10.8%	2.0%
YouTube or other online videos	3.2%	3.0%
Travel agency (traditional, offline)	2.5%	1.4%
Travel guides, brochures	2.1%	20.6%
Official Visit St. Pete/Clearwater Destination Magazine	2.1%	2.6%
Television programming	1.6%	8.6%
Radio programming	1.0%	5.7%
Lifestyle or travel magazines	0.9%	2.4%
Newspaper travel section	0.7%	2.0%

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. 431 responses.



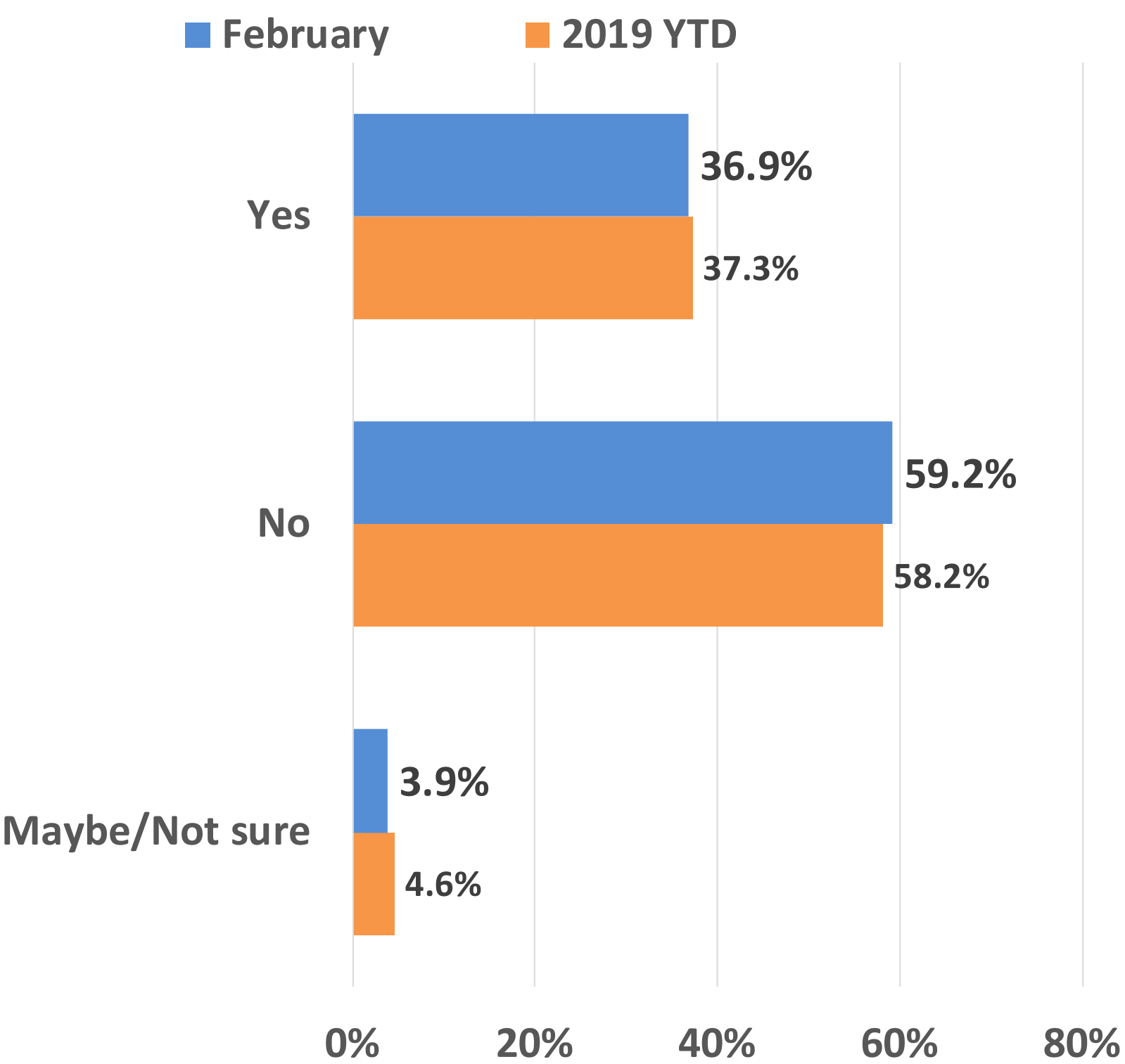
# Experience Satisfaction / Earned & Paid Media Recall

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. 429 responses.

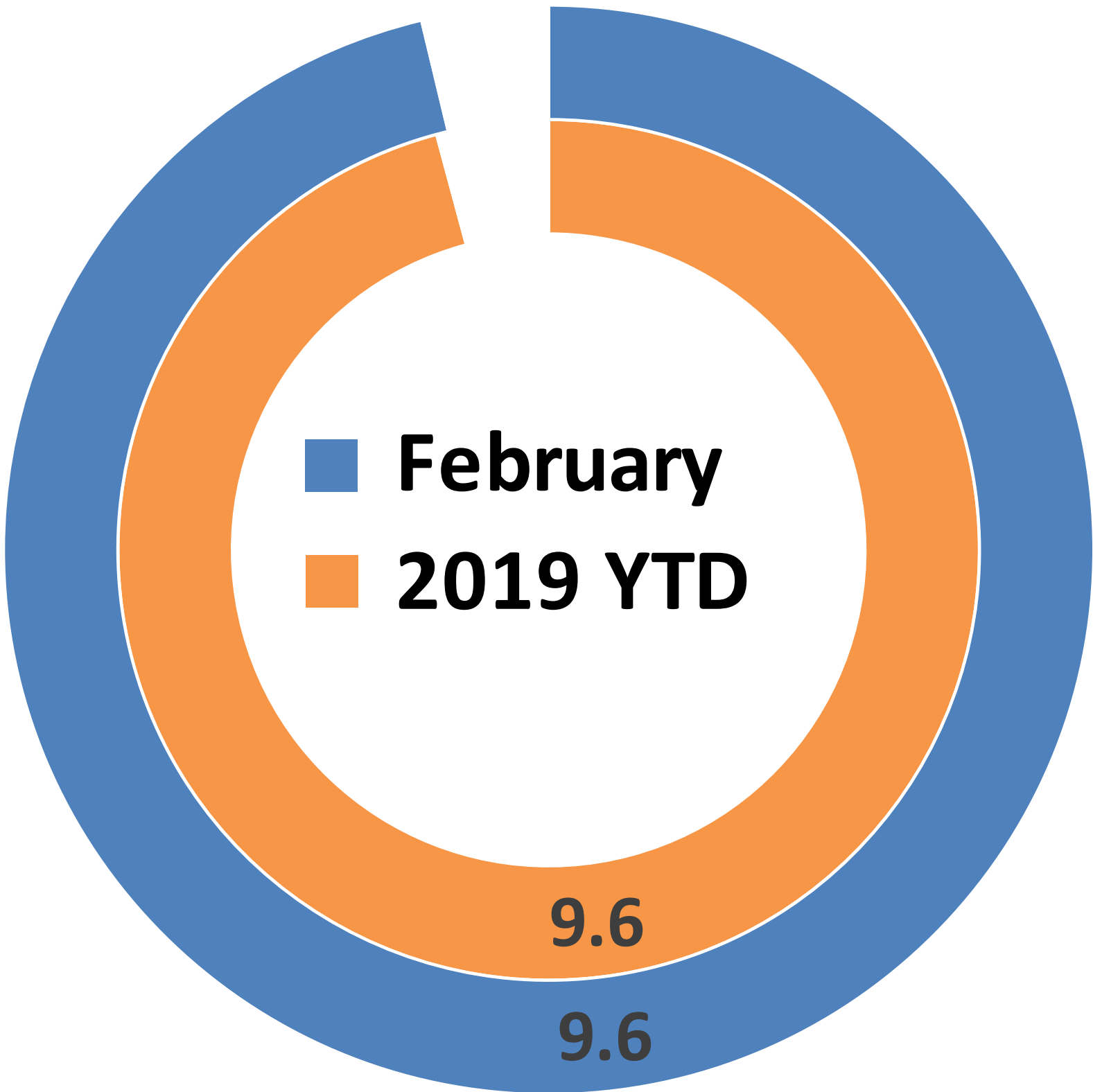
Chart: Media Recall



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. 415 responses.

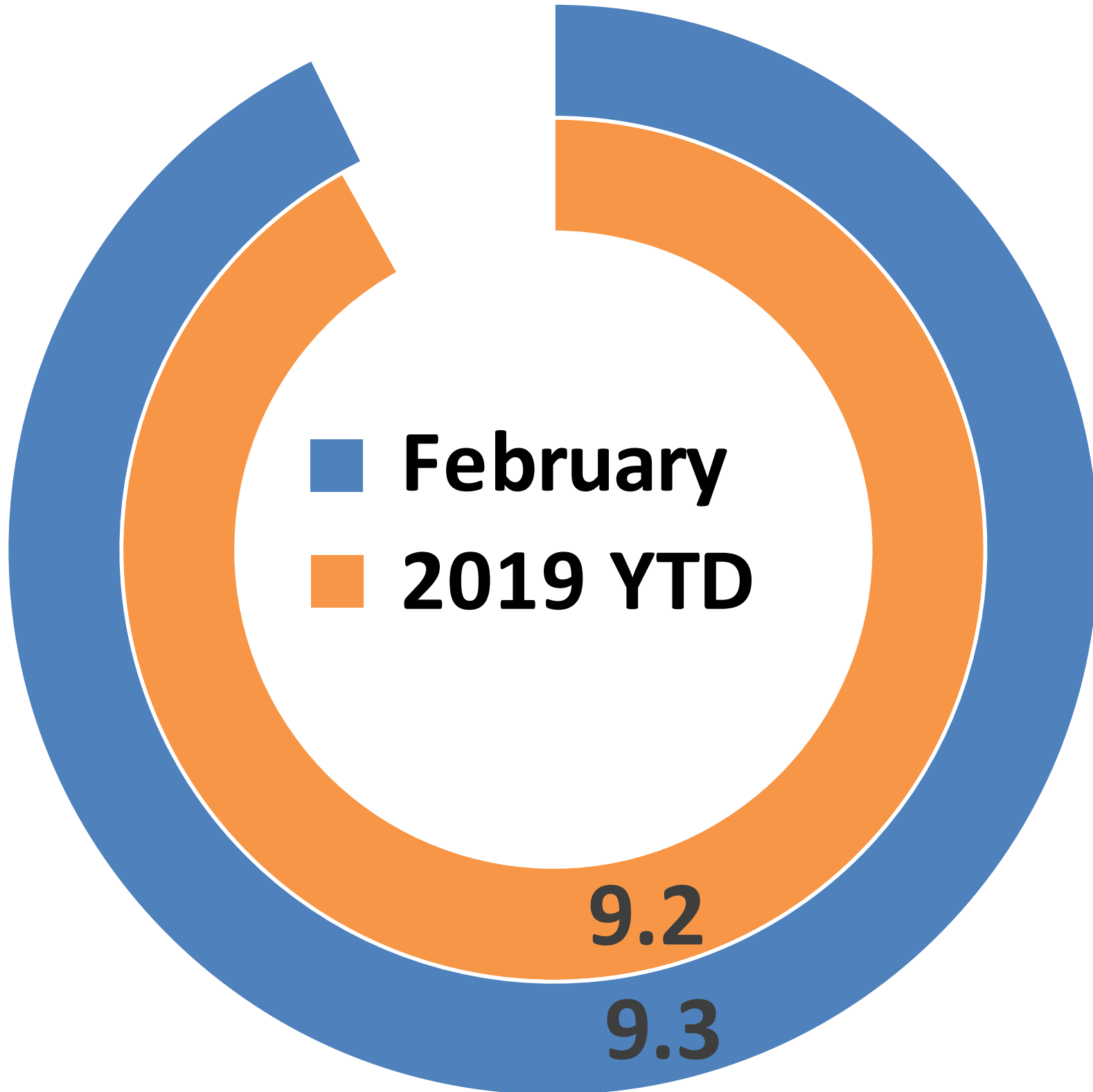
# Likelihood to Recommend / Likelihood to Return

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. 430 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. 426 responses.