

DATA & MARKETING

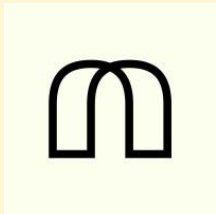
Joint BCC & TDC | Sep 11, 2025



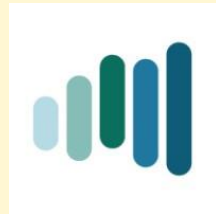
ST.PETE
CLEARWATER, FL

Data drives our marketing decisions.

VisitSPC utilizes data from multiple sources to picture the profile, impact and motives of visitors to Pinellas County.



Future Partners
Intercept Surveys
Economic Analysis
Visitor Profiles
Market Research



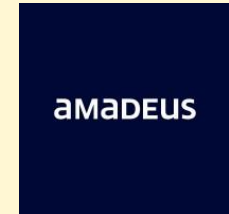
Key Data
Vacation Rental
direct data from
136 Property
Managers and 2853
units



Tourism Economics
Symphony Data
Dashboard
GCT Global
Databanks



CoStar
Hotel direct data
from the majority of
properties in Pinellas
County



Amadeus
Via Key Data –
direct hotel feeder
market data from
about half of Pinellas
County inventory

2025 Marketing & Promotion Execution

“And” Campaign Launched in Jan 25

Insight: More people reported doing other activities in the destination than previously. **Result:** America’s Favorite Beaches **AND** So Much More



Dining & The Arts

We've focused on our food scene & connected the arts

Recognition in the 2025 Michelin Guide.

Four local chefs highlighting the destination in New York.

Food-focused media visits and stories including Southern Living, Forbes, The Kitchn & Woman's World.

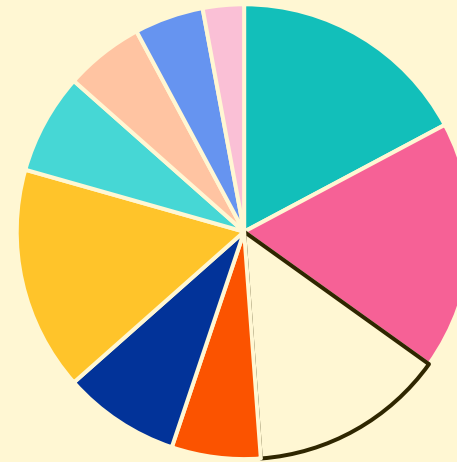














2025 Media Mix & Targeting

Traditional: 47.3% Digital: 52.7% (vs 78% Traditional and 22% Digital in 2024)

National/Audience Targeted	41.5%
New York	15.4%
Greater Tampa Bay	7.3%
Orlando	5.3%
Chicago	5.7%
Atlanta	4.3%
Minneapolis-St. Paul	3.5%
Philadelphia	3.1%
Rest of Florida	2.8%
Charlotte	2.5%
Detroit	1.5%
Nashville	1.4%
Cincinnati	1.4%
Pittsburgh	1.0%

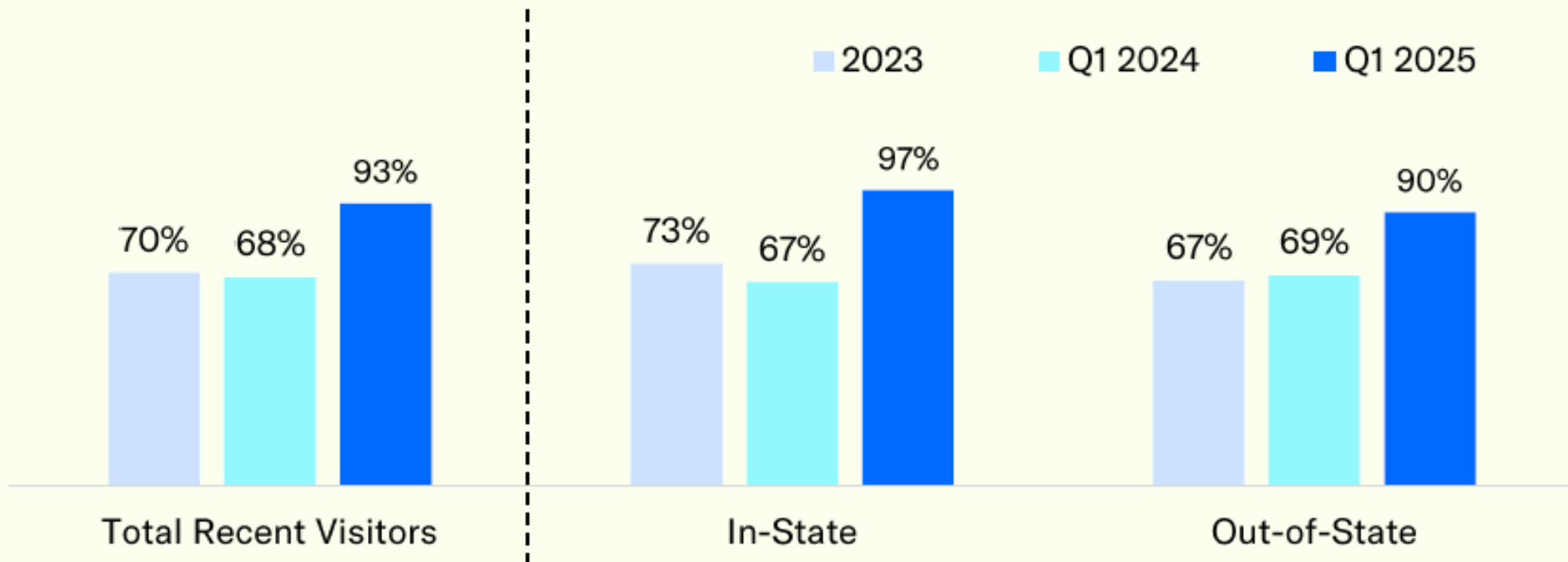


	Broadcast TV	14.7%
	Connected TV	15.1%
	Radio	11.9%
	Digital Audio	5.4%
	Print	7.1%
	OOH	13.6%
	Dlg. Display & Video	6.1%
	Content/Native	4.8%
	Paid Social	4.2%
	Paid Search	2.5%

Ad Effectiveness: Impact

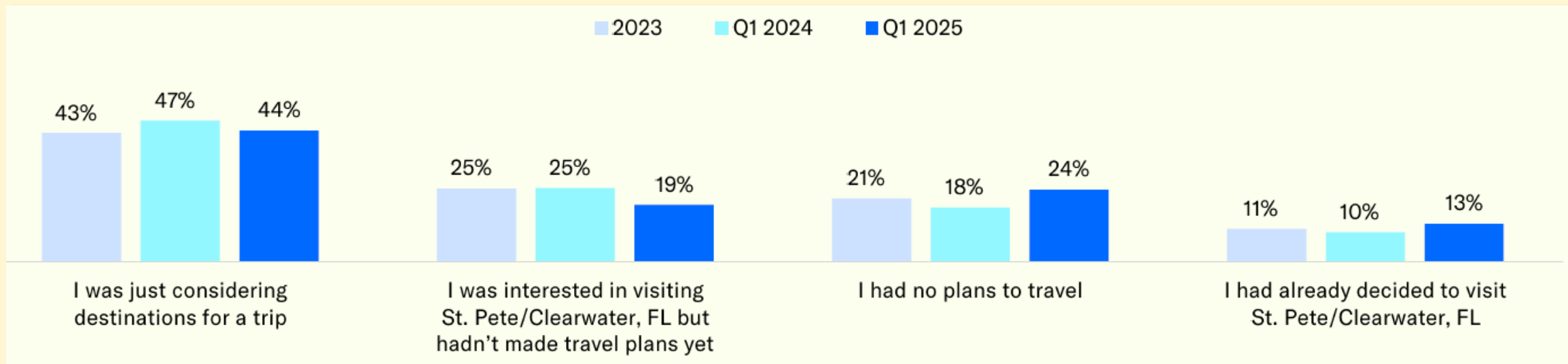
Among those who previously heard/saw the ads and then visited **93%** said that the ads impacted their decision to visit St. Pete-Clearwater.

Impact of Ads on Decision to Visit St. Pete/Clearwater by Market**
(% of Visitors who said the ads they recalled influenced their decision to visit)



Ad Effectiveness: Timing

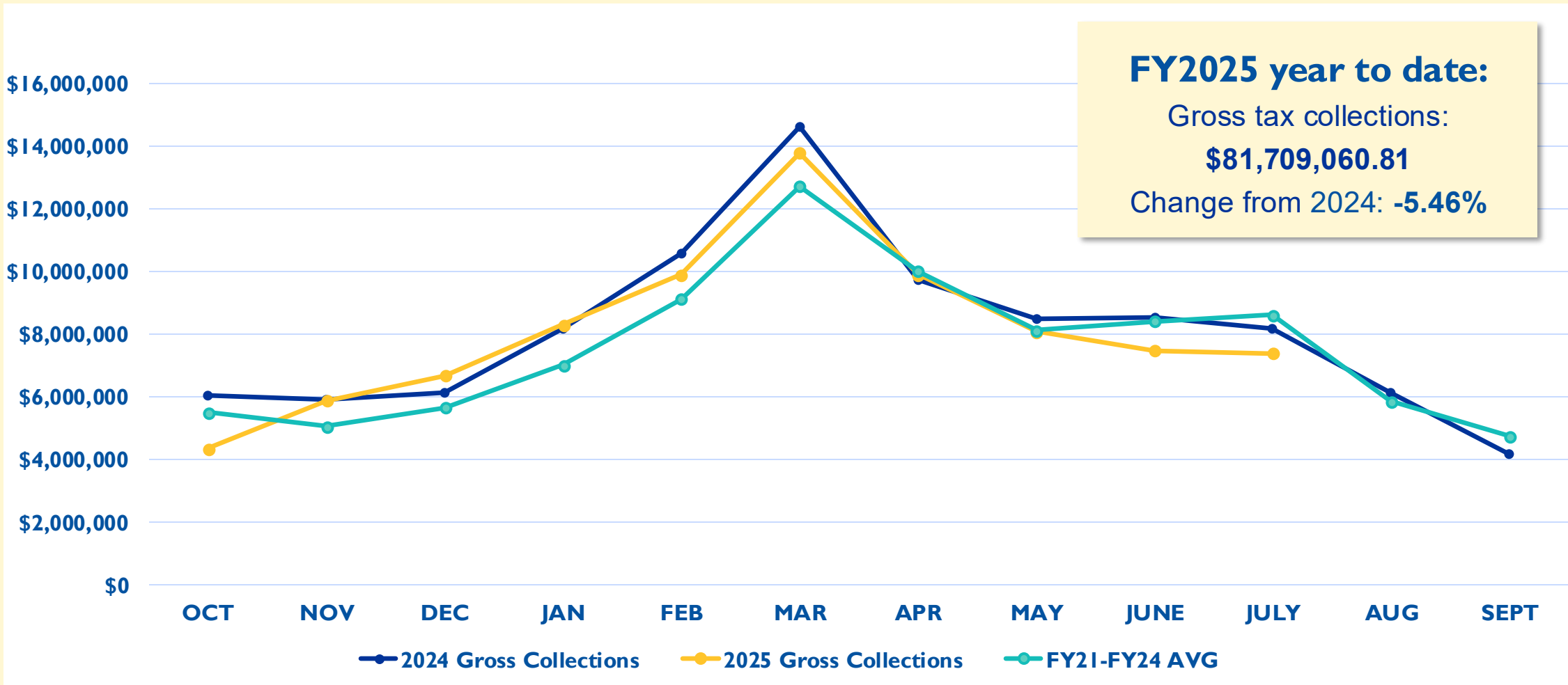
Only **13%** had already made the decision to visit when exposed to the ads.
87% were either just considering, had some interest or had no plans to travel at all.



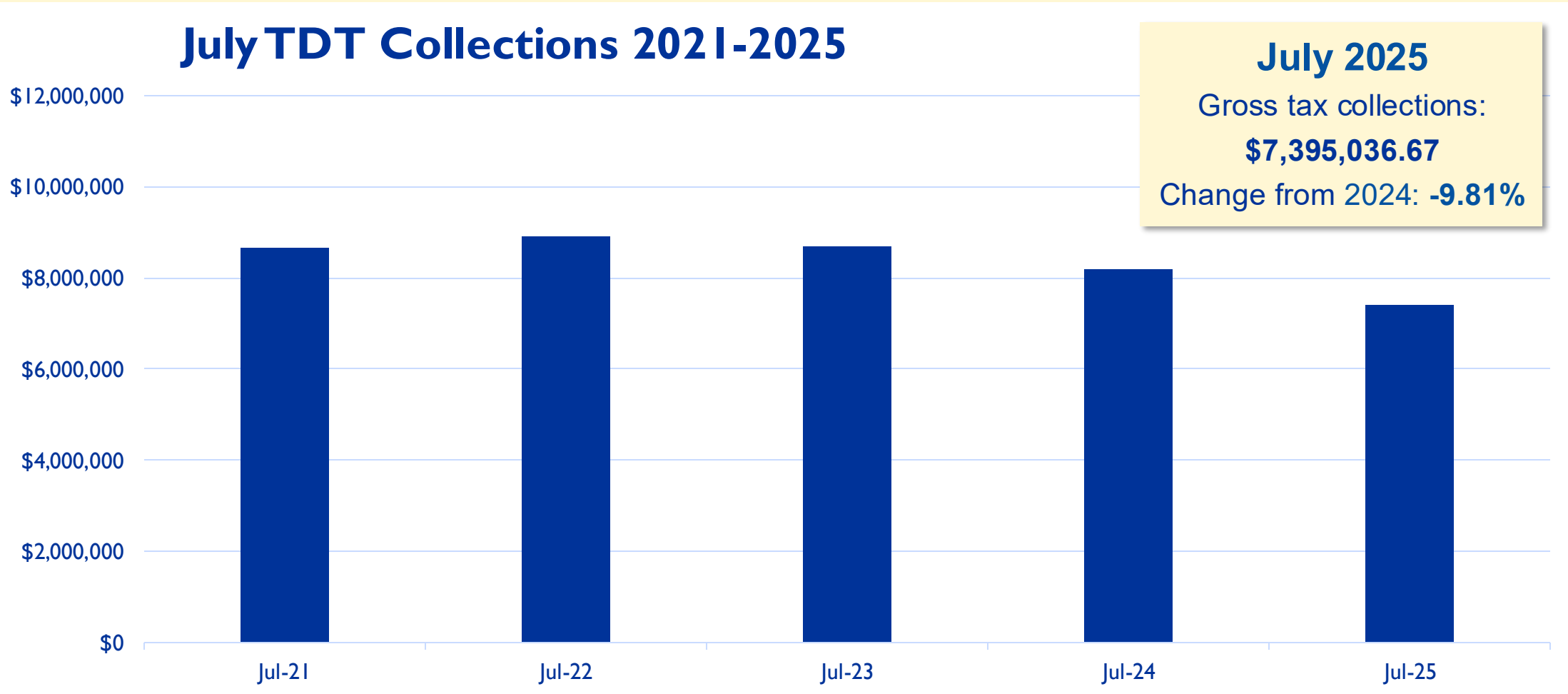
2025 Visitation Data



Tourist Development Tax: Year to Date



Tourist Development Tax: July



TDT Local Option – July TDT

Local Option TDT	July 2024 Tax Collected	July 2025 Tax Collected	July Change from 2024	July Difference from 2024
Dunedin	\$76,060.86	\$86,764.28	14.1%	\$10,703.42
Clearwater/Clearwater Beach	\$2,360,203.68	\$2,356,293.47	-0.2%	(\$3,910.21)
Vacation Rental/MISC	\$2,840,134.29	\$2,621,639.66	-7.7%	(\$218,494.63)
St. Pete	\$726,909.38	\$660,877.47	-9.1%	(\$66,031.91)
Tarpon Springs/Oldsmar/Palm Harbor/Safety Harbor	\$169,541.10	\$150,289.13	-11.4%	(\$19,251.97)
Indian Rocks/Indian Shores/Madeira/Belleair Beach	\$417,544.64	\$322,106.56	-22.9%	(\$95,438.08)
Treasure Island	\$384,973.47	\$287,995.92	-25.2%	(\$96,977.55)
St. Pete Beach	\$1,171,258.78	\$832,501.91	-28.9%	(\$338,756.87)

Visitor Trip Activities & Trip Factors

Top 5 2025 vs 2024 (Hotel Guests, January to June Visitor Profile)

Factors in Decision to Visit	2024	2025
Beaches that suit me	55%	61%
Outdoor recreation	23%	55%
Weather	49%	54%
Restaurants/Food Scene	3%	43%
Attractions	37%	42%

Trip Activities	2024	2025
Dining in restaurants	95%	99%
Visit the beach	75%	78%
Shopping	53%	63%
Visit museums	38%	59%
Other boating	33%	55%

Visitor Resources Used

2025 vs 2024 (January to June Visitor Profile)

Pre-arrival Resources	2024	2025
Social Media	49%	65%
Opinions of friends or relatives	28%	40%
Review sites, (Yelp, TripAdvisor etc)	34%	30%
Online Travel (Expedia, Travelocity, etc.)	31%	29%
Travel guides, brochures	13%	9%

In-Market Resources	2024	2025
Social Media	28%	42%
Travel guides, brochures	33%	32%
Review sites, (Yelp, TripAdvisor etc)	46%	26%

Hotels: Open vs Temporarily Closed

1,220 (5.2%) rooms remain closed.

704 of which are on St. Pete Beach.

94.8% of hotel rooms in Pinellas County are open.

But only **66.3%** in St. Pete Beach

Community	Open	Temp Closed	Total	Percentage Open
Belleair Beach	64	42	106	60.4%
St Pete Beach	1385	704	2089	66.3%
North Redington Beach	205	28	233	88.0%
Treasure Island	1223	112	1335	91.6%
Redington Shores	96	8	104	92.3%
Clearwater	5334	194	5528	96.5%
Indian Rocks Beach	406	14	420	96.7%
Clearwater Beach	3850	91	3941	97.7%
Saint Petersburg	5766	27	5793	99.5%
Indian Shores	104	0	104	100.0%
Belleair	35	0	35	100.0%
Dunedin	625	0	625	100.0%
Gulfport	12	0	12	100.0%
Largo	550	0	550	100.0%
Madeira Beach	617	0	617	100.0%
Oldsmar	470	0	470	100.0%
Palm Harbor	478	0	478	100.0%
Pinellas Park	413	0	413	100.0%
Redington Beach	44	0	44	100.0%
Safety Harbor	193	0	193	100.0%
Tarpon Springs	303	0	303	100.0%
Tierra Verde	95	0	95	100.0%
Room Totals	22,268	1,220	23,488	94.8%

Hotel Pipeline

27 hotel projects in the CoStar hotel pipeline report.

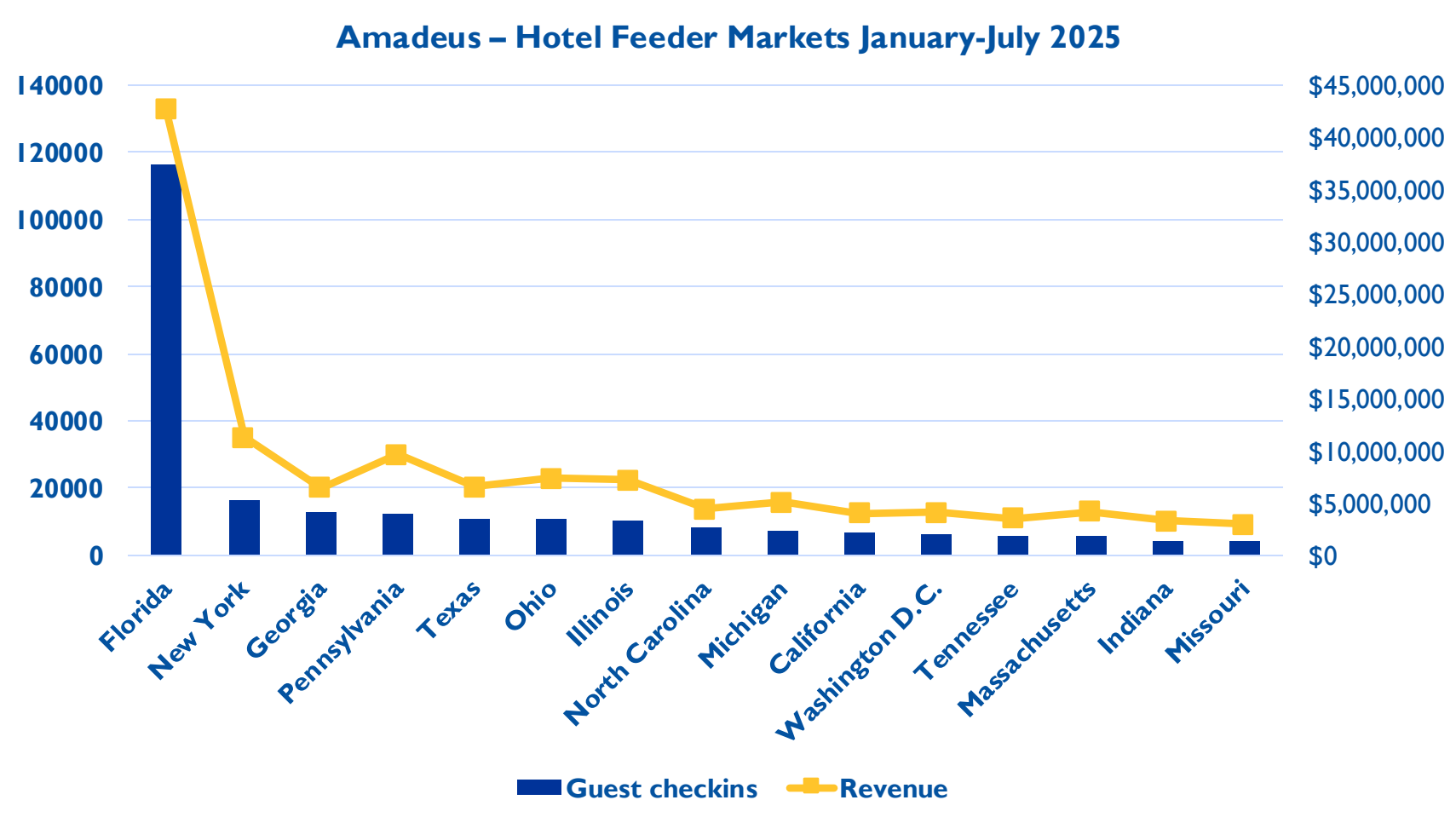
3082 estimated new hotel rooms.

New hotels concentrated in St. Pete, Clearwater, and Tarpon Springs.

Property Name	Submarket Name	Rooms	Year
Clearwater Point Hotel	Clearwater	60	2026
CW Resort & Marina	Clearwater	91	2026
Tarpon Springs Hotel	Tarpon Springs/North Shore	8	2026
The St. James Hotel	Tarpon Springs/North Shore	36	2026
Clearwater Downtown, Tapestry Collection by Hilton	Clearwater	228	2027
Residence Inn by Marriott Clearwater	Clearwater	125	2027
Autograph Collection Madeira Beach	St Petersburg	161	2027
Echelon City Center Hotel	St Petersburg	120	2027
Edge District Boutique Hotel	St Petersburg	114	2027
Mixed Use Hotel-1st Ave South	St Petersburg	60	2027
Schooner Resort	St Petersburg	56	2027
Tempo by Hilton St. Petersburg Downtown	St Petersburg	185	2027
The Windward Pass Resort	St Petersburg	104	2027
Beachfront Hotel	Clearwater	135	2028
Embassy Suites by Hilton Clearwater Beach	Clearwater	180	2028
Autograph Collection St. Petersburg	St Petersburg	170	2028
Hampton by Hilton St Pete Beach	St Petersburg	130	2028
JW Marriott St. Pete Beach	St Petersburg	290	2028
The Coronet Hotel	St Petersburg	74	2028
Gateway Hotel Dunedin	Tarpon Springs/North Shore	79	2028
Hampton Inn & Suites by Hilton Clearwater Central	Clearwater	117	2029
Home2 Suites by Hilton Clearwater Central	Clearwater	84	2029
Future Thunderbird Beach Resort	St Petersburg	68	2029
North Redington Beach Luxury Boutique Resort	St Petersburg	56	2029
WoodSpring Suites Largo	Clearwater	122	2034
Cambria at the Sponge Docks	Tarpon Springs/North Shore	107	2034
WoodSpring Suites Tarpon Springs	Tarpon Springs/North Shore	122	2034

Top Hotel Feeder Markets

January to July 2025



Florida

40.4% of check ins
27.6% of domestic revenue

Out of State

59.6% of check ins
72.4% of domestic revenue

Source: Amadeus. Data is a direct sample of 643.1k guest check ins in Pinellas County from Jan. 1 thru July 31, 2025



Top Hotel Feeder Markets YOY

January to July 2025

State	Check Ins vs '24	Revenue vs '24
Florida	-1.6%	0.0%
New York	-7.6%	-8.9%
Pennsylvania	-2.6%	-2.9%
Ohio	-1.8%	-3.7%
Illinois	-6.3%	-7.0%
Texas	-0.4%	0.1%
Georgia	-4.9%	-6.2%
Michigan	-4.1%	-3.9%
North Carolina	-2.5%	-2.1%
Massachusetts	-2.4%	-3.8%

Market Area	Change from '24
Tampa-St. Petersburg-Clearwater	3.3%
Orlando	-6.6%
Miami	-7.3%
Jacksonville	-4.5%
Bradenton-Sarasota-Venice	10.3%
Fort Myers	2.7%

International Feeder Markets YOY

Hotels

	Check ins vs 2024	Revenue vs 2024
Canada	-23.3%	-23.8%
Europe	-6.1%	-11.3%
UK	4.5%	32.9%
LATAM	10.3%	33.5%

Source: Amadeus. Data from sample of 2654 guest check ins in 2025 | 2273 check ins in 2024

Vacation Rentals

	Check ins vs 2024	Revenue vs 2024
Canada	-34.0%	-28.39%
Europe	4.9%	-10.92%
UK	6.5%	-12.69%
LATAM	29.0%	108.00%

Source: Key Data. Data from sample of 1268 guest check ins in 2025 | 1698 check ins in 2024

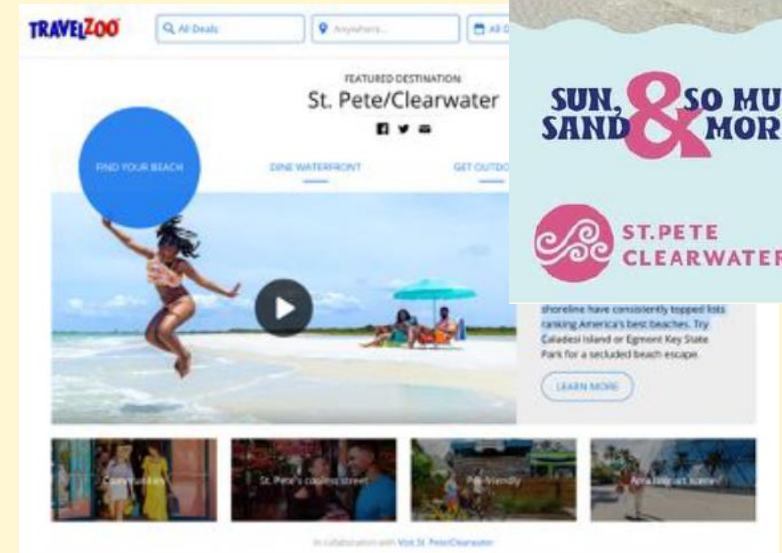
Summary

- Local visitation (Greater Tampa Bay) is up, but other markets in Florida are soft, particularly Orlando.
- National fly markets are down, the bigger the market the bigger the decline.
- International travel is broadly down but travel to St.Pete-Clearwater is stronger than many other US markets.
 - Canada is the biggest change

Immediate Action

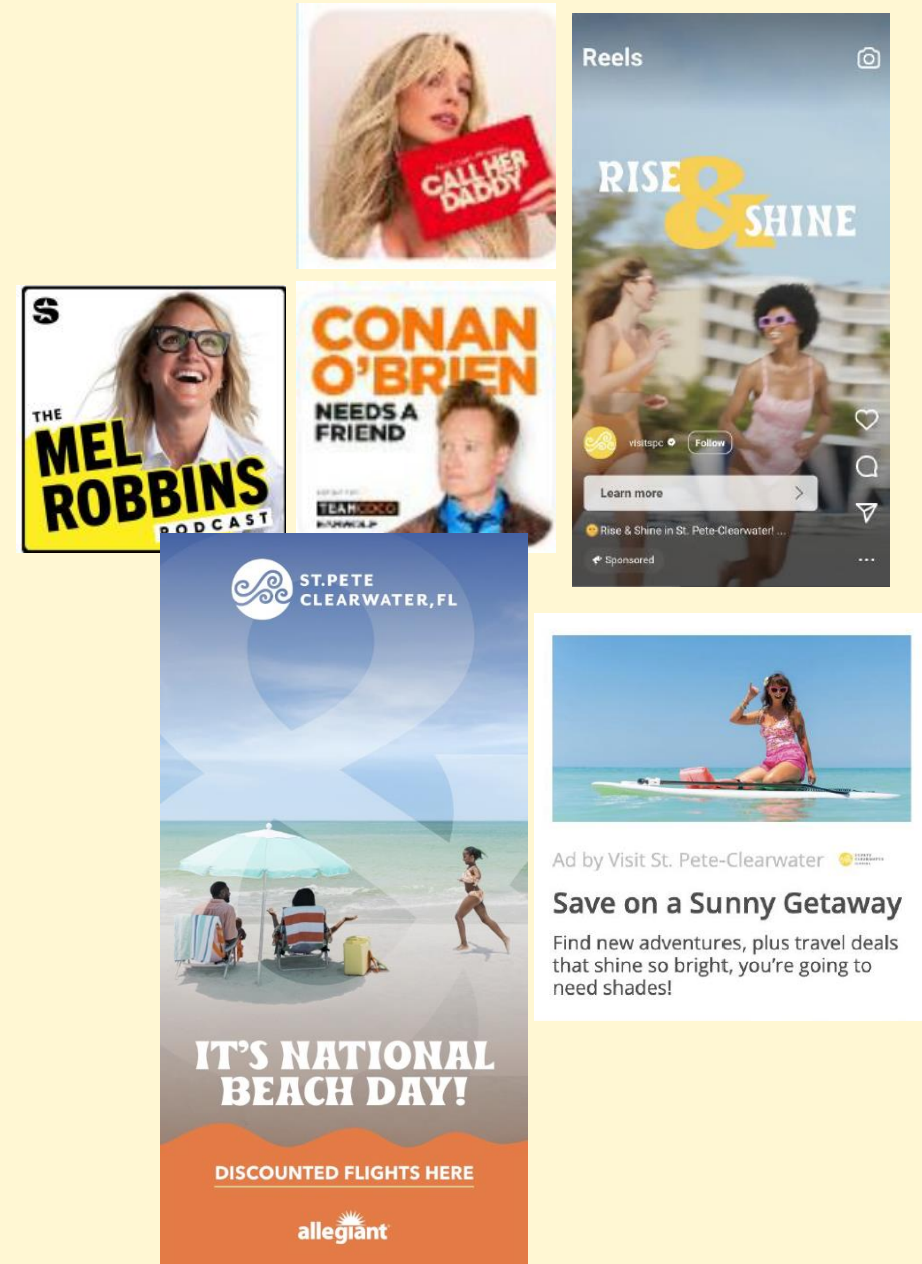
Fall: Florida

- Significant increase in spending in target markets.
- More beach-centric creative
- Targeted OOH around Epic Universe in Orlando
- TravelZoo and Hopper promotions to drive hotel bookings



Fall: National & Canada

- Partnered with Allegiant to create the first ever **National Beach Day** promotion with discounted flights on all 62 routes serving PIE
- Trip Advisor Takeover of their beach section for National Beach Day
- National Podcasts campaign including host reads
- Streaming TV and digital in



State of Travel Industry

Skift US Travel Health Index

U.S. Skift Travel Index Summary									
FY25	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25
Total	104.3	102.4	105.0	106.3	102.8	102.7	100.3	101.3	102.9
Aviation	104.1	102.6	104.9	104.6	100.8	101.7	100.3	101.4	105.9
Hotels	97.3	90.3	96.3	103.2	100	102	96.2	96.5	95.3
Vacation Rentals	103.1	103.7	101.9	103.9	106.2	103	105.8	106	103.1

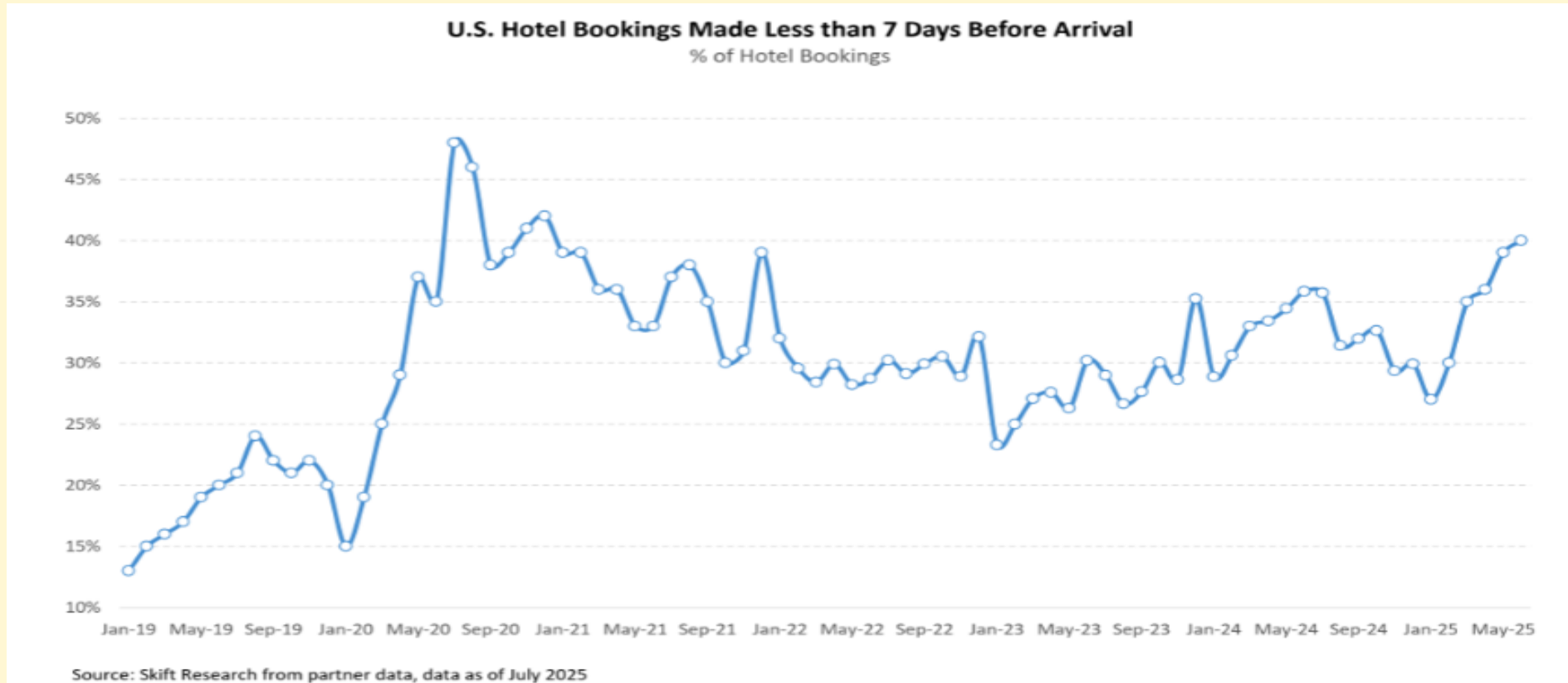
Measuring travel industry health across four main sectors: aviation, hotels, vacation rentals, and car rentals.

100 = same as previous year

Data is an index vs previous year of U.S. data aggregated from 88 real-time indicators, including travel search intent, bookings, key performance metrics like occupancy and load factors, cancellations, and future reservations.

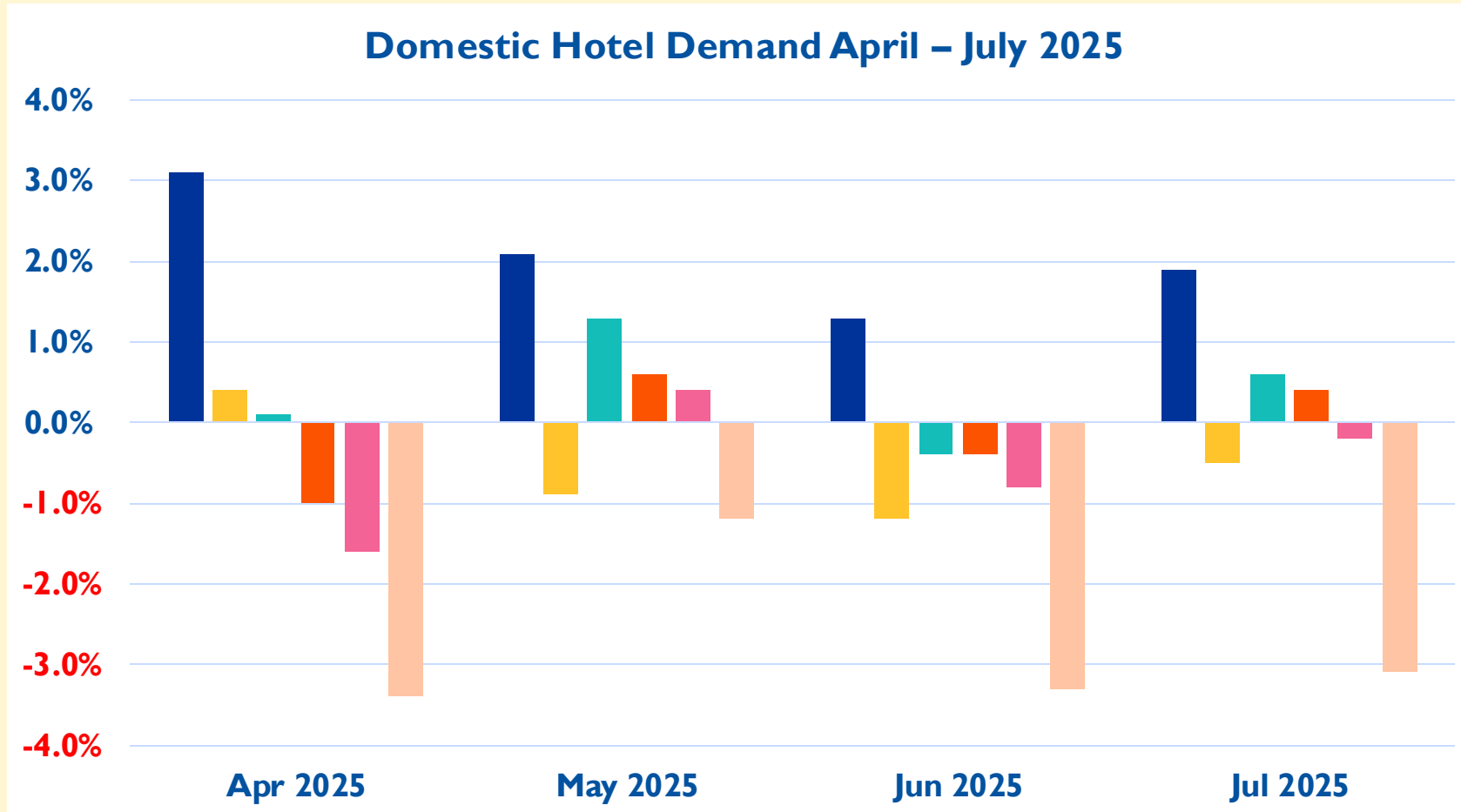
Domestically, in FY25 vacation rental and aviation are out-performing FY24, while hotel performance has, on average, fallen below 2024 levels.

U.S. Last Minute Bookings are Surging



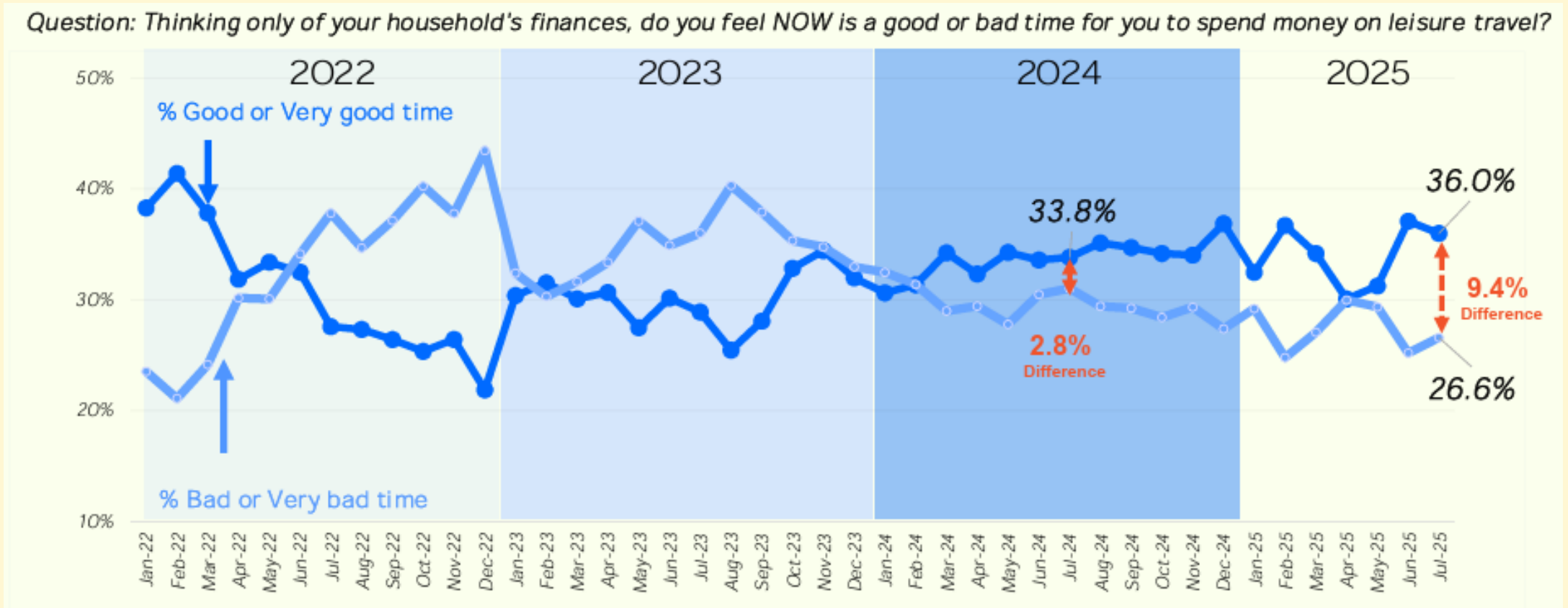
As of June 2025, **40%** of hotel bookings were made within seven days of arrival. Suggesting uncertainty is factor in current travel planning.

National Hotel Demand by Type



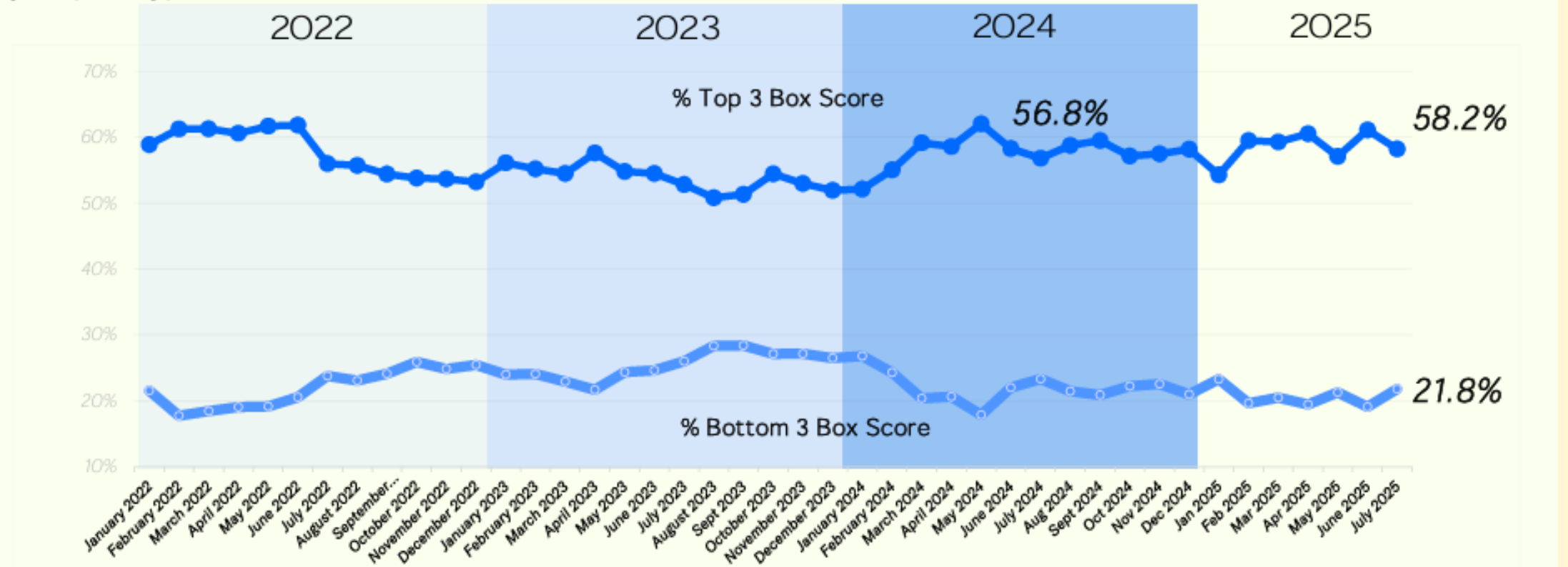
		12 mo ADR
	Luxury	\$384.59
	Upper Upscale	\$221.42
	Upscale	\$165.05
	Upper Midscale	\$134.67
	Midscale	\$101.39
	Economy	\$78.55

State of the American Traveler: Travel Confidence



State of the American Traveler: Travel Budget Priority

Question: Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities. Leisure travel will be a(n) _____.



2026

New Agency

After an exhaustive RFP process, we have selected **Envisionit** (Chicago) as our new advertising agency.

Founded in 2002. Strong in tourism, but also in finance and technology

With approval of the contract, they will start mid-Sept



Envisionit in their words

- *“We rethink how destinations approach DMAs in today’s evolving privacy landscape to mitigate investment waste.”*
- *“We advise on shifts in technology strategy to maximize utilization and create financial flexibility.”*
- *“We introduce new methodologies for demonstrating return on investment to stakeholders and their communities.”*
- *“We continually bring innovative ideas to the table - even beyond the initial scope of work - to improve overall performance.”*

2026 Strategy

- Core strategy remains the same.
 - **St.Pete-Clearwater has amazing beaches and lots, lots more.**
- Executions will evolve as Envisionit start work
 - Ampersand will likely play less of a role
- Position our unique selling proposition consistently - but express it differently for each audience.
 - Broad messaging intended to appeal to everyone tends to resonate with no one. **Precision is where performance begins.**

2026 Markets & Targeting

- Still looking to reach the right people in core markets but not just going to be “In a city” or broadly buying DMAs
- Envisionit will lead a more specific targeting strategy using zip code, visitation and census data with AI analysis
- Driving improved performance and ROI
- Continued shift from traditional media (TV/Radio/Outdoor) to more targetable digital platforms (CTV, digital audio, digital billboards)



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