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St. Petersburg/Clearwater Area Convention and Visitors Bureau

May 2000 Visitor Profile



Prepared for:

Pinellas County Board of County Commissioners
and

St. Petersburg/Clearwater Area Convention and Visitors Bureau

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President

Research Data Services, Inc.

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May 2000 Visitor Profile -- St. Petersburg/Clearwater Area Convention and Visitors Bureau

	Annual 1999 *	Year to Date (H/M/C/C & V F/R)			May		
		1999 *	2000 *	% Δ 99/00	1999	2000	% Δ 99/00
H/M/C/C Visitors	2,389,117	981,939	1,023,056	+4.2	197,015	206,644	+4.9
V F/R Visitors	2,152,994	1,029,575	1,063,171	+3.3	127,004	130,941	+3.1
Total	4,542,111	2,011,514	2,086,227	+3.7	324,019	337,585	+4.2
H/M/C/C Exp.	\$1,434,500,403	\$690,002,193	\$737,471,512	+6.9	\$117,160,880	\$127,557,208	+8.9
V F/R Exp.	1,002,090,037	484,296,429	505,945,793	+4.5	64,658,305	67,995,902	+5.2
Total	\$2,436,590,440	\$1,174,298,622	\$1,243,417,305	+5.9	\$181,819,185	\$195,553,110	+7.6

Visitor Origin	Annual 1999 *	Year to Date (H/M/C/C & V F/R)			May (H/M/C/C & V F/R)				
		1999 Visitor # *	2000 Visitor # *	% Δ	% Rel.	1999 Visitor #	% Rel.	2000 Visitor #	% Δ
Florida	397,468	109,377	122,744	+12.2	9.2%	29,810	9.5%	32,071	+7.6
Southeast	288,263	90,511	98,766	+9.1	7.3	23,653	7.6	25,656	+8.5
Northeast	978,376	526,224	551,146	+4.7	22.6	73,228	23.2	78,320	+7.0
Midwest	1,378,828	685,021	708,743	+3.5	32.3	104,658	32.1	108,365	+3.5
Canada	338,373	201,088	206,001	+2.4	5.1	16,525	5.5	18,567	+12.4
Europe	951,468	322,609	317,615	-1.5	19.4	62,860	17.6	59,415	-5.5
U.S. Opp. Mkts	161,434	66,010	71,393	+8.2	4.1	13,285	4.5	15,191	+14.3
Latin American	47,901	(4/99) 10,674	(4/00) 9,819	-8.0	n/a	n/a	n/a	n/a	n/a
Total	4,542,111	2,011,514	2,086,227	+3.7	100.0	324,019	100.0	337,585	+4.2

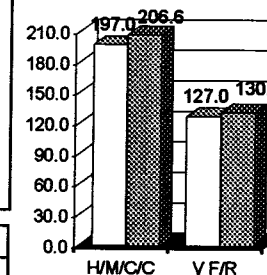
* Please Note: Latin American Visitor numbers published seasonally only.

Occupancy: Industry (Weighted)	Jan.	Feb.	Mar.	Apr.	May
Occupancy Rate 99/00	75.1%	92.8%	93.1%	86.7%	75.8%
Occupancy Rate 98/99	73.1	91.7	91.8	85.6	74.1
Δ Points	+2.0	+1.1	+1.3	+1.1	+1.7
Average Room Rate 99/00	\$71.52	\$86.88	\$90.44	\$85.62	\$71.19
Average Room Rate 98/99	67.60	82.50	87.73	79.33	68.78
Δ Percent	+5.8%	+5.3%	+3.1%	+7.9%	+3.5%

Occupancy: By Size	May Occupancy			May Room Rate		
	1999	2000	Point Δ	1999	2000	% Δ
< 20 units	68.0%	70.3%	+2.3	\$54.87	\$56.66	+3.3
21 - 50 units	73.7	74.8	+1.1	59.98	60.73	+1.3
51 - 100 units	75.4	77.2	+1.8	67.84	72.28	+6.5
101+ units	75.5	77.4	+1.9	78.67	81.53	+3.6

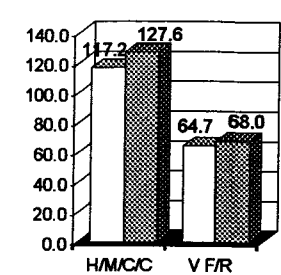
May Visitors
(in Thousands)

□ 1999 ■ 2000



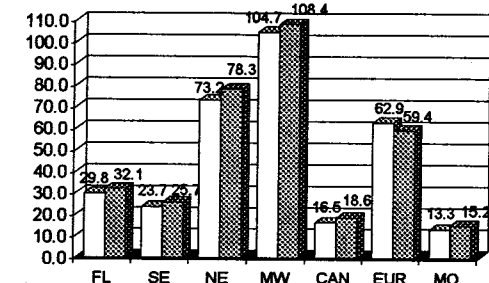
May Expenditures
(in Millions)

□ 1999 ■ 2000



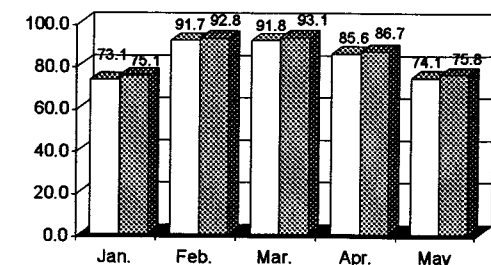
May Visitor Origin (in Thousands)

□ 1999 ■ 2000



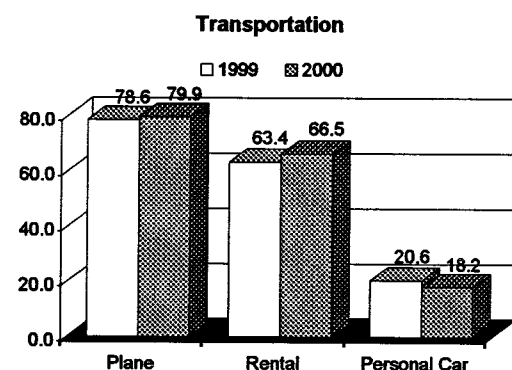
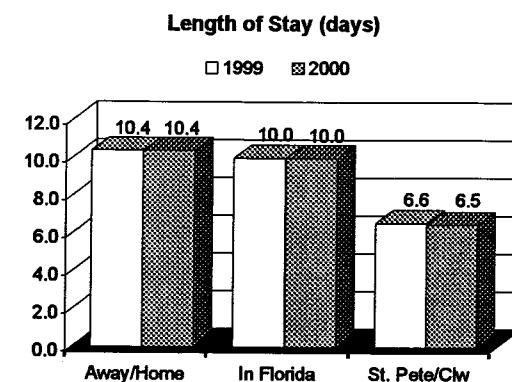
Industry Occupancy (by Month)

□ 98/99 ■ 99/00

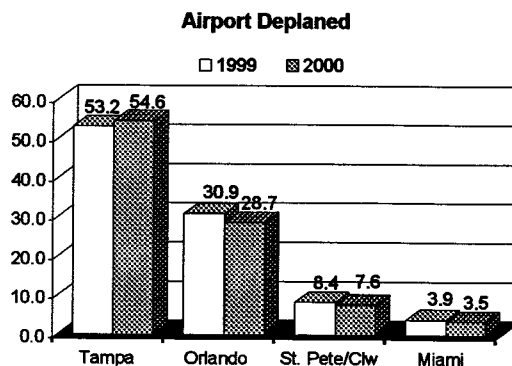


May 2000 Visitor Profile -- St. Petersburg/Clearwater Area Convention and Visitors Bureau

	May 1999	May 2000
Length of Stay (days)		
Away from Home	10.4	10.4
In Florida	10.0	10.0
In St. Petersburg/Clearwater Area	6.6	6.5
Party Size (# of people)	2.7	2.6
Party Composition		
Couple	46.0%	47.4%
Family	43.2	42.7
Single	5.1	6.2
Transportation		
Plane	78.6%	79.9%
Rental Car	63.4	66.5
Personal Car	20.6	18.2

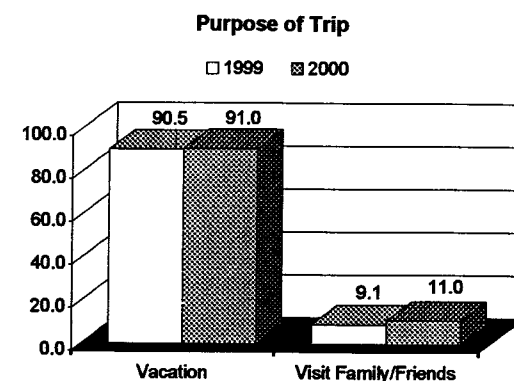


	Total		Europe	
	1999	2000	1999	2000
Airport Deplaned				
Tampa International	53.2%	54.6%	20.8%	29.0%
Orlando International/Sanford	30.9	28.7	64.1	61.2
St. Petersburg-Clearwater	8.4	7.6	N/A	N/A
Miami International	3.9	3.5	9.9	6.5
Car Rental Location				
Tampa	53.8%	55.3%	21.9%	30.1%
Greater Orlando Area	29.8	28.4	62.8	60.5
St. Petersburg/Clearwater Area	8.2	7.2	1.2	N/A
Miami	3.0	2.5	7.5	5.2



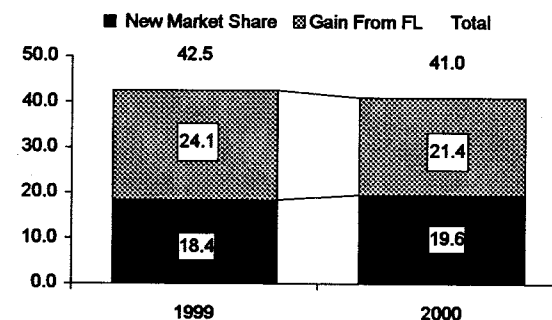
May 2000 Visitor Profile -- St. Petersburg/Clearwater Area Convention and Visitors Bureau

Purpose of Trip	Total		Europe	
	1999	2000	1999	2000
A. Profile Data				
Vacation	90.5%	91.0%	99.3%	99.7%
Visit Friends/Relatives	9.1	11.0	1.7	2.1
B. Occupancy Survey Data				
Business	16.4%	18.1%	N/A	N/A
Convention/Conference	6.0	6.3	N/A	N/A

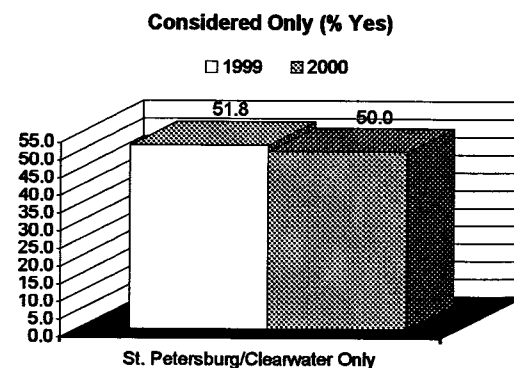


First Visit to (% yes)	Total		Europe	
	1999	2000	1999	2000
St. Petersburg/Clearwater Area	42.5%	41.0%	63.4%	62.5%
Florida	18.4	19.6	42.7	40.0

First Visit to St. Petersburg/Clearwater Area (%Yes)



Considered St. Petersburg/ Clearwater Area Only	Total		Europe	
	1999	2000	1999	2000
	51.8%	50.0%	26.8%	31.5%

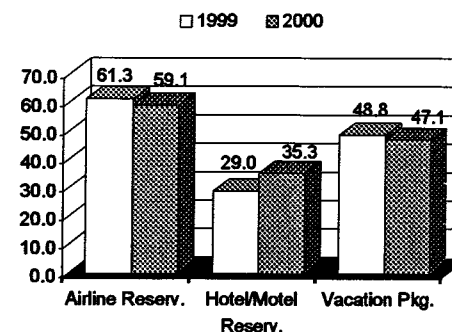


May 2000 Visitor Profile -- St. Petersburg/Clearwater Area Convention and Visitors Bureau

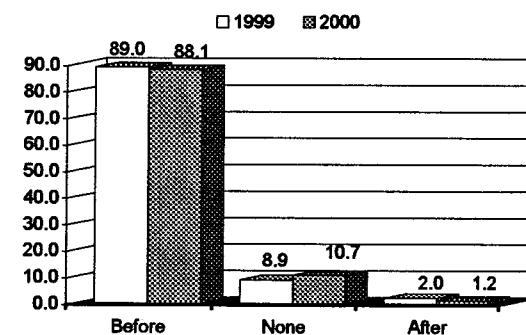
	Total		Europe	
	1999	2000	1999	2000
Information Sources (Volunteered)				
Previous Visit	54.5%	56.5%	36.4%	38.7%
Print Media	30.1	25.7	66.3	58.3
Recommendation	27.4	26.1	40.6	42.9
Internet*	N/A	16.0	N/A	13.0
Business Contacts	13.7	13.8	1.4	N/A
Travel Agent	8.3	3.1	17.8	12.4
Travel Agent Assisted (% Yes)	50.8%	33.9%	74.3%	65.4%
Travel Agent Assistance				
Airline Reservations	61.3%	59.1%	28.0%	34.2%
Hotel/Motel Reservations	29.0	35.3	14.7	19.9
Vacation Packages (Including Fly/Drive)	48.8	47.1	75.4	72.5
Reservations				
Before Leaving Home	89.0%	88.1%	88.0%	86.7%
None	8.9	10.7	11.0	13.3
After Arrival	2.0	1.2	1.0	N/A
Where Stay Night Before				
St. Petersburg/Clearwater Area				
At Home	63.8%	64.2%	20.6%	26.6%
In Florida (not in St. Pete/Clearwater)	30.0	29.5	76.3	69.5
On Road (not in Florida)	6.2	6.3	3.1	3.9
Where in Florida				
<i>(Base: Respondents in Florida Night Prior to Arriving in St. Petersburg/Clearwater)</i>				
Orlando	72.7%	70.3%	86.4%	88.9%
Tampa	5.1	5.4	3.2	N/A
Visit Other Florida Areas This Trip				
<i>(Overnight trips only -- % yes)</i>	38.0%	37.4%	74.7%	73.3%

*Source: 2000 St. Petersburg/Clearwater Area Visitor Internet Research

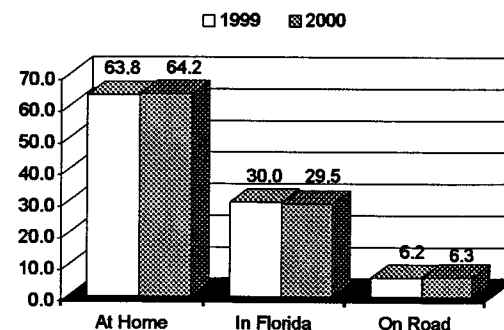
Travel Agent Assistance



Reservations



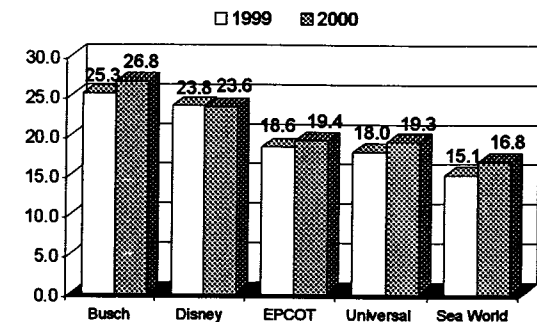
Where Stay Night Before St. Petersburg/Clearwater Area



May 2000 Visitor Profile -- St. Petersburg/Clearwater Area Convention and Visitors Bureau

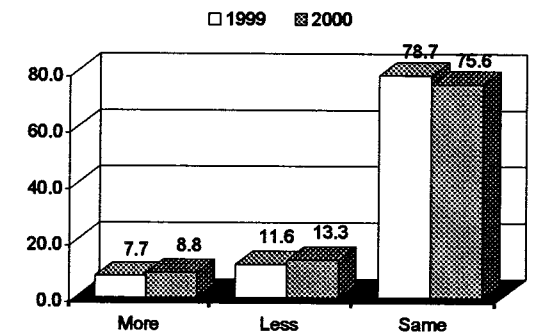
Attractions/Theme Parks Visited	Total		Europe	
	1999	2000	1999	2000
Busch Gardens	25.3%	26.8%	48.3%	42.3%
Disney World	23.8	23.6	61.2	55.3
EPCOT	18.6	19.4	49.9	48.6
Universal Studios	18.0	19.3	48.9	46.9
Sea World	15.1	16.8	38.6	32.8
MGM	12.8	9.0	41.2	35.9
Satisfaction with St. Petersburg/Clearwater Area				
Satisfied (Combined)	95.6%	96.7%	93.1%	92.3%

Attractions/Theme Parks Visited (Top Five)

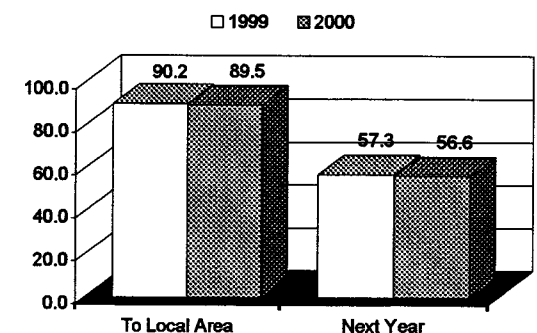


Expense Relative to Expectations	Total		Europe	
	1998	2000	1999	2000
More Expensive	7.7%	8.8%	11.9%	15.5%
Less Expensive	11.6	13.3	9.9	9.5
As Expected	78.7	75.6	68.3	66.6
Recommend St. Petersburg/Clearwater to Friends/Relatives (% yes)				
	94.9%	95.4%	95.5%	95.2%
Plan to Return (% yes)				
To Local Area	90.2%	89.5%	80.2%	82.9%
Next Year (Base: Planning to Return)	57.3	56.6	20.7	22.2
Median Age Head of Household (years)				
	42.8	43.1	42.7	41.5
Median Annual Household Income				
	\$60,756	\$63,570	\$58,710	\$63,531

Expense Relative to Expectations

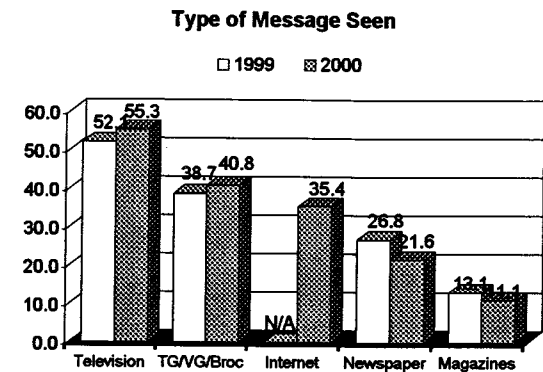


Plan to Return



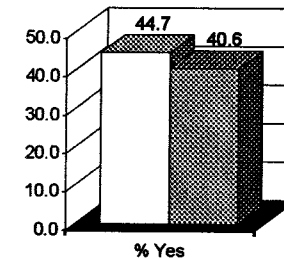
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	Total		Europe	
	1999	2000	1999	2000
St. Petersburg/Clearwater Message Seen/Read/Heard (% yes)	44.7%	40.6%	48.7%	45.3%
Source of Information				
Television	52.1%	55.3%	43.3%	34.1%
Brochures/Visitor Guides/Travel Guides	38.7	40.8	56.8	61.1
Internet*	N/A	35.4	N/A	21.8
Newspapers	26.8	21.6	16.7	10.1
Magazines	13.1	11.1	10.8	5.3
Directly Influenced by Message (Base: Seen/Read/Heard Area Message)	29.9%	33.3%	38.2%	35.9%



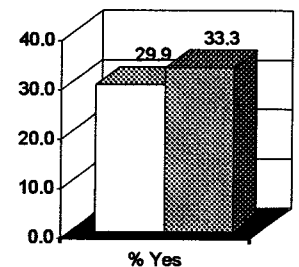
Seen/Read/Heard Message

□ 1999 ■ 2000



Influenced by Message

□ 1999 ■ 2000

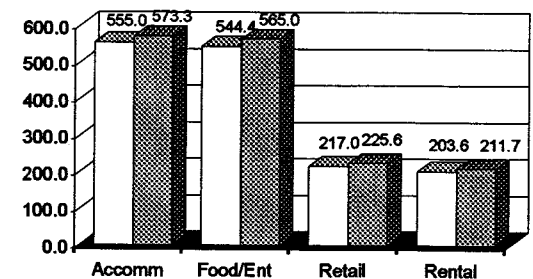


	May 1999	May 2000
Budget Breakdown		
Accommodations	\$554.96	\$573.29
Food/Entertainment	544.42	565.00
Retail Purchases	216.99	225.58
Rental Car	203.60	211.68
St. Petersburg/Clearwater Area Base Budget		
Total	\$1,298.55	\$1,347.90
Per Person/Trip	480.94	518.42
Per Person/Day	72.87	79.76

Occupation		
Professional/Technical	35.9%	34.6%
Executive/Managerial	16.1	17.0
Craft/Mechanical/Factory	15.3	15.0
Retired	12.0	11.7
Salesman/Buyer	7.4	7.0

Budget Breakdown

□ 1999 ■ 2000



*Source: 2000 St. Petersburg/Clearwater Area Visitor Internet Research

May 2000 Visitor Profile -- St. Petersburg/Clearwater Area Convention and Visitors Bureau

When Did Visitors "Start Talking" About Going on This Trip vs. Make the Decision to Come to the St. Petersburg/Clearwater Area (Decision Window)

	Start Talking		Decide	
	May '99	May '00	May '99	May '00
Less than One Month	27.1%	25.8%	36.5%	35.5%
1 - 2 Months	20.2	23.5	24.6	28.5
3 Months	11.3	12.1	11.0	13.4
More than Three Months	41.4	38.6	27.9	22.6

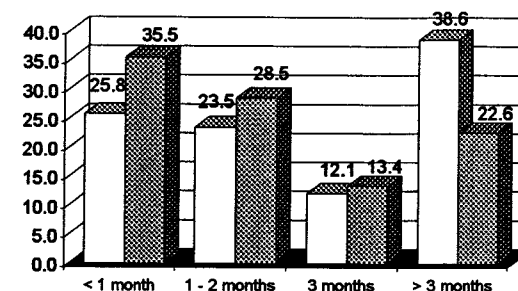
	May 1999	May 2000
Use a Computer at Home or Work	80.6%	83.6%
Use an On Line Service (Base: Respondents with use of a computer)	83.5%	87.7%
Use On Line Service to: (Base: Respondents who have used on line services)		
Obtain Travel Information	58.4%	60.5%
Book Travel Reservations on-line	21.9	34.7

Occupancy Rate Type of Establishment

	Hotel	Motel/ Resort Vacation	Motel Urban/ Midtown	Motel Roadside	Condo- miniums
May 1999					
Occupancy Rate	76.7%	69.8%	59.7%	58.9%	68.9%
Average Unit Rate	\$83.00	\$54.59	\$43.23	\$43.45	\$93.72
May 2000					
Occupancy Rate	78.5%	71.2%	62.2%	60.3%	70.3%
Average Unit Rate	\$85.91	\$56.87	\$44.72	\$44.53	\$98.05

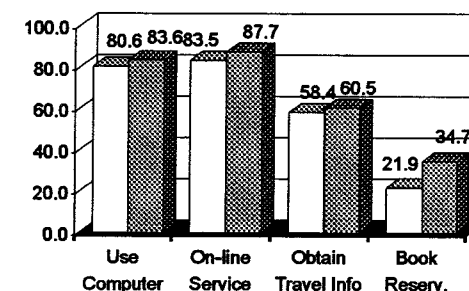
Start Talking vs. Decision to Come to Area

□ Start Talking 2000 ■ Decide to Come To Area 2000



Computer Use

□ 1999 ■ 2000



TOP ADI'S

<u>May 1999</u>		<u>May 2000</u>		<u>'99</u> <u>Rank</u>
1. Chicago	13.1%	1. Chicago	12.2%	1
2. New York	8.0	2. New York	9.0	2
3. Tampa/St. Petersburg	6.9	3. Tampa/St. Petersburg	6.3	3
4. St. Louis	4.5	4. Detroit	4.7	5
5. Detroit	4.4	5. Orlando/Daytona Beach	4.2	8
6. Cincinnati	4.1	6. St. Louis	4.2	4
7. Philadelphia	3.5	7. Cincinnati	3.9	6
8. Orlando/Daytona Beach	3.3	8. Philadelphia	3.8	7
9. Indianapolis	3.1	9. Boston	3.5	10
10. Boston	3.0	10. Pittsburgh	3.3	11
11. Pittsburgh	3.0	11. Indianapolis	3.0	9