VISITOR PROFILE STUDY
Dashboard of Findings

Pinellas County - July 2021
Overview & Methodology

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 detailed in the table to the right.

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<thead>
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<th></th>
<th>2017</th>
<th>2018</th>
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<th>2020</th>
<th>2021</th>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>443</td>
</tr>
</tbody>
</table>

Filter: 2021 - July; Weight: WEIGHT - Numeric; base n = 443; effective sample size = 256 (58%); 98%
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  July 2021

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

- **July-19**: 69.5
- **July-20**: 22.0
- **July-21**: 43.1

**Travel Party Size**

- July-21: 2.9
- July-19: 3.0

**Average Days & Nights**

- **Days**:
  - July-19: 2.8
  - July-20: 2.3
  - July-21: 3.1
- **Nights**:
  - July-19: 1.2
  - July-20: 1.3
  - July-21: 2.2

**Generations**

- **Millennial or younger**: 27.2%
- **Gen X**: 50.4%
- **Boomer or older**: 35.3%

**Average Age**

- **July-19**: 45.5
- **July-20**: 46.0
- **July-21**: 46.9

**Percent Staying Overnight**

- **39.5%** July-19
- **23.3%** July-20
- **35.6%** July-21

**Average Daily Spending**

- **July-21**: $282.39
- **July-19**: $227.89
- **July-20**: $232.50

**Average Income**

- **July-21**: $109,352
- **July-20**: $85,720
- **July-19**: $92,010
Point of Origin

**Country of Origin**
- United States: 98%
- Canada: 1%
- United Kingdom: 0%
- Germany: 0%
- France: 0%
- Mexico: 0%
- China: 0%
- Other: 0%

**State of Origin**
- Florida: 44%
- Ohio: 5%
- Georgia: 4%
- Illinois: 4%
- Tennessee: 4%
- Missouri: 3%
- Texas: 3%
- New York: 3%
- Kentucky: 3%
- Michigan: 3%
- Alabama: 2%
- Connecticut: 2%

**MSA of Origin**
- Tampa, FL: 21%
- Sarasota-Bradenton, FL: 11%
- Orlando, FL: 4%
- Lakeland-Winter Haven, FL: 4%
- Atlanta, GA: 3%
- Dallas-Fort Worth, TX: 3%
- St. Louis, MO-IL: 3%
- Nashville, TN: 2%
- Detroit, MI: 2%
- Chicago, IL: 2%
- Cincinnati, OH-KY-IN: 2%
- Melbourne-Titusville-Palm Bay, FL: 1%

Base: 2021 - July 443 responses.
Lodging Type / Daily Spending in Market

**Lodging Type Daily Spending**

- Hotel, resort or motel in SPC: 21%
- Home share rental in the SPC: 4%
- Condo/vacation home in the SPC: 10%
- Private residence in SPC: 0%
- Day trip: 64%

**Daily Spending**

- Hotel/motel/inn/lodging: $100
- Restaurants: $95
- Retail store purchases: $50
- Other Entertainment & sightseeing: $29
- Gas, parking and local transportation: $10
- Car rental (in area only): $2
- Other: $3
- Mean Travel Party Spending = $ 290
- Avg # of People Covered by Spending = 3
- Mean Spending Per Person = $ 102

*Base: 2021 - July 443 responses.*
Days & Nights in St. Pete/Clearwater

Days in Market

<table>
<thead>
<tr>
<th>Days</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>60%</td>
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<td>2</td>
<td>10%</td>
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<td>3</td>
<td>6%</td>
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<td>9</td>
<td>0%</td>
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<tr>
<td>10 or more</td>
<td>2%</td>
</tr>
</tbody>
</table>

Mean Days

\( \leq 30\) = 3
\( > 30\) = 3

Nights in Market

<table>
<thead>
<tr>
<th>Nights</th>
<th>Percentage</th>
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<td>4%</td>
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<tr>
<td>3</td>
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<td>9</td>
<td>1%</td>
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<tr>
<td>10 or more</td>
<td>1%</td>
</tr>
</tbody>
</table>

Mean Nights

\( \leq 30\) = 2
\( > 30\) = 2

Base: 2021 - July 443 responses.
Primary Reason for Visit / Other Destinations Visited

### Primary Reason for Visit

- **Vacation**: 56%
- **Attend special event, exhibition or concert**: 16%
- **Visit friends or family in the area**: 12%
- **Weekend getaway**: 7%
- **Other personal reasons**: 6%
- **Wedding**: 1%
- **Government business/travel**: 1%
- **Business**: 0%
- **Attend sports event/tournament**: 0%
- **Conference/tradeshow or other group meeting**: 0%
- **Honeymoon**: 0%
- **On or pre/post a cruise**: 0%

### Other Destinations Visited on SPC Trip

- **Tampa**: 25%
- **Sarasota Area**: 16%
- **Orlando/Disney**: 5%
- **Lakeland/Winter Haven**: 4%
- **Crystal River**: 2%
- **Jax/St. Augustine**: 2%
- **Panhandle**: 2%
- **Ft. Lauderdale/Palm Beach**: 1%
- **Ft. Myers/SW Florida**: 1%
- **Miami**: 1%
- **Sebring**: 1%
- **Kennedy/Space…**: 1%
- **Florida Keys**: 0%
- **Tallahassee**: 0%
- **Ocala/Gainesville**: 0%
- **Daytona**: 0%
- **Everglades**: 0%
- **NONE—The St…**: 48%

**Base: 2021 - July 443 responses.**
Method of Arrival / Arrival Airport & Airline

<table>
<thead>
<tr>
<th>Method of Arrival</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Personal vehicle</td>
<td>63%</td>
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<tr>
<td>Airline</td>
<td>31%</td>
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<tr>
<td>Rental vehicle</td>
<td>5%</td>
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<tr>
<td>Tour bus</td>
<td>3%</td>
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<tr>
<td>Rideshare (Uber, Lyft, etc.)</td>
<td>2%</td>
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<tr>
<td>Taxi or limo</td>
<td>0%</td>
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<tr>
<td>RV</td>
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<tr>
<td>Public bus</td>
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<td>Train</td>
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<tr>
<td>Other</td>
<td>2%</td>
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</tbody>
</table>

Method of Departure

<table>
<thead>
<tr>
<th>Method of Departure</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Personal vehicle</td>
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<tr>
<td>Airline</td>
<td>28%</td>
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<tr>
<td>Rental vehicle</td>
<td>4%</td>
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<tr>
<td>Tour bus</td>
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<tr>
<td>Rideshare (Uber, Lyft, etc.)</td>
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<td>RV</td>
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<td>Taxi or limo</td>
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<td>Train</td>
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<td>Public bus</td>
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<tr>
<td>Other</td>
<td>2%</td>
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Base: 2021 - July 443 responses.
Method of Arrival / Arrival Airport & Airline

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<thead>
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<th>Airport of Arrival</th>
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<th>20%</th>
<th>40%</th>
<th>60%</th>
<th>80%</th>
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</thead>
<tbody>
<tr>
<td>Tampa Int'l.</td>
<td>62%</td>
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<tr>
<td>St. Pete-Clearwater Int'l</td>
<td>27%</td>
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<tr>
<td>Orlando Int'l.</td>
<td>8%</td>
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<tr>
<td>Sarasota/Bradenton Int'l</td>
<td>2%</td>
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<td>Sanford Int'l</td>
<td>1%</td>
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<tr>
<td>SW FL Int'l. (Ft. Myers)</td>
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<td>Miami Int'l.</td>
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<tr>
<td>Ft. Lauderdale Int'l.</td>
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<tr>
<td>Palm Beach Int'l.</td>
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<td>Jacksonville Int'l.</td>
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<tr>
<td>Other</td>
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</table>

Base: 2021 - July 443 responses.

Airline Used by Airport of Arrival

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<th>Allegiant</th>
<th>American Airlines</th>
<th>Delta Airlines</th>
<th>United</th>
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<th>Sun Country</th>
<th>Alaska Airlines</th>
<th>Other</th>
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<td>13.0%</td>
<td>5.6%</td>
<td>4.9%</td>
<td>0.7%</td>
<td>0.3%</td>
<td>6.6%</td>
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<tr>
<td>St. Pete-Clearwater Int'l</td>
<td>3.4%</td>
<td>94.2%</td>
<td>0.0%</td>
<td>0.7%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>1.7%</td>
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</tbody>
</table>
Rental Vehicle Pick-Up City / Transportation Used In-Market

**Rental Vehicle Pick-Up City**
- Tampa: 72%
- St. Petersburg/ Clearwater area: 14%
- Orlando: 9%
- Sanford: 4%
- Sarasota/Bradenton: 0%
- Ft. Myers: 0%
- Fort Lauderdale: 0%
- Miami: 0%
- West Palm Beach: 0%
- Jacksonville: 0%
- Outside of Florida: 0%

**Transportation Used In-Market**
- Personal vehicle: 69%
- Rental vehicle: 22%
- Uber, Lyft, etc.: 6%
- Tour bus: 3%
- Free Beach Rides: 1%
- Taxi or limo: 1%
- Boat: 0%
- Public bus: 0%
- RV: 0%
- Motorcycle: 0%
- Bicycle: 0%

Base: 2021 - July 443 responses.
Travel Party Composition / Travel Party Size

**Travel Party Composition**
- Solo: 7%
- Couple: 47%
- Immediate Family: 34%
- Extended Family: 4%
- Group of Couples: 4%
- Group of Friends: 12%
- Tour Group: 1%
- Business Associates: 0%
- Other: 0%

**Travel Party Size**
- Female adults (18 yrs. +): 1
- Male adults (18 yrs. +): 1
- Female children (0 to 17 yrs.): 0.2
- Male children (0 to 17 yrs.): 0

**Avg Travel Party Size = 3**
**Percent with Children = 32%**

Base: 2021 - July 443 responses.
**Important Factors to Destination Decision / Trip Activities**

### Important to Decision to Visit

- Beaches that suit my tastes: 31%
- Easy to get to: 23%
- Overall ambiance & atmosphere: 22%
- Attractions in the area: 21%
- Arts & cultural offerings: 20%
- Scenic beauty: 19%
- Weather: 19%
- A specific attraction: 17%
- Friends or family in the area: 16%
- Restaurants, cuisine, food scene: 13%
- Recommendation from people I trust: 12%
- Advertisements for the area: 11%
- St. Pete Pier: 7%
- Shopping opportunities: 6%
- Appealing hotels/resorts: 6%

### Trip Activities

- Dining in restaurants: 93%
- Shopping: 59%
- Visit the beach: 54%
- Swimming: 40%
- Visit museums: 31%
- Visit friends or family: 12%
- Other boating: 11%
- Guided tour: 7%
- Bars/Nightlife: 5%
- Photography: 5%
- Jet skiing: 4%
- Shelling: 4%
- Kayaking/Canoeing: 4%
- Bird watching: 3%
- Attend a festival or special event: 3%

*Base: 2021 - July 443 responses.*
First-Time Visit to Florida / Previous Visitation to St. Pete/Clearwater

First Time Visitors to Florida

- Yes: 4%
- No: 96%

Previous Visitation to the St. Pete/Clearwater Area

- First Time Visitor: 26%
- 1 - 10 Previous Visits: 40%
- 11 - 20 Previous Visits: 7%
- More than 20 Visits: 28%

Mean # of Past Trips = 11

Base: 2021 - July 443 responses.
Attractions Visited / Communities Visited

**Attractions Visited**
- St. Pete Pier: 23%
- Chihuly Exhibit: 14%
- Sunken Gardens: 10%
- Dali Art Museum: 7%
- Clearwater Marine Aquarium: 6%
- Orlando area Theme Parks: 2%
- Tarpon Springs: 2%
- Caladesi Island: 2%
- Florida Aquarium in Tampa: 1%
- Busch Gardens: 1%
- Other: 11%
- NONE OF THESE: 50%

**Communities Visited**
- St. Petersburg: 50%
- Clearwater Beach: 35%
- Madeira Beach: 28%
- St. Pete Beach: 24%
- Treasure Island: 12%
- Indian Shores & Indian Rocks Beach: 8%
- Clearwater: 7%
- North Redington Beach/Redington...: 5%
- Tarpon Springs: 4%
- Dunedin: 4%
- Pass-A-Grille Beach: 4%
- Largo: 2%
- Tierra Verde: 2%
- Seminole: 1%
- Safety Harbor: 1%

Base: 2021 - July 443 responses.
Most Liked Aspects of SPC (Unaided)

- Beaches / Ocean: 56%
- Scenic Beauty: 29%
- Tropical Climate / Warm Weather: 23%
- Attractions (Museums, Aquarium, etc.): 21%
- Everything: 12%
- Entertainment / Variety of Fun: 10%
- Food / Restaurants & Bars: 7%
- Relaxing Atmosphere / Ambiance: 6%
- Friendly People: 4%
- Family Friendly: 3%
- Great Location / Easy to get to: 3%
- Accessible / Convenient / Walkable: 2%
- Shopping: 2%
- Clean: 1%
- Safe: 0%

Feelings in SPC Area (Unaided)

- Calm / Relaxed: 50%
- Happy: 15%
- Energized / Excited: 8%
- Amazing: 7%
- Refreshed / Healthy: 6%
- Entertained: 5%
- Fine / Good: 4%
- Comfortable: 2%
- Welcomed: 2%
- Warm: 1%

Base: 2021 - July 443 responses.
Attractions or Services that Would Enhance the Destination Experience

Additional Attractions or Services (Unaided)

- It needs no improvement: 82%
- Cheaper & More Parking: 5%
- Less congestion / traffic: 2%
- More shaded / green areas: 2%
- More public restrooms: 1%
- More kid friendly activities: 1%
- Restaurant Diversity: 1%
- Bars and food options on the beach: 1%
- Tourist Information: 1%
- More Activities / Attractions: 0%
- More Affordable: 0%
- More Shopping: 0%
- Better Nightlife: 0%
- Clean it up: 0%
- More Public Transportation Options: 0%

Base: 2021 - July 443 responses.
When Decision to Visit was Made / Travel Planning Resources Used

Average Time Between Decision to Visit and Arrival

43 Days in Advance

Resources Used before Arrival and While In Market

- **Official St. Petersburg/Clearwater area tourism website:**
  - Before Arriving: 45%
  - While in Market: 35%

- **User-generated content/Review websites, such as Yelp and...**
  - Before Arriving: 41%
  - While in Market: 31%

- **Social Media content**
  - Before Arriving: 40%
  - While in Market: 30%

- **Online travel agencies (Expedia, Travelocity, etc.)**
  - Before Arriving: 35%
  - While in Market: 28%

- **Opinions of friends or relatives**
  - Before Arriving: 9%
  - While in Market: 10%

- **Travel guides, brochures**
  - Before Arriving: 24%
  - While in Market: 10%

- **Television programming**
  - Before Arriving: 8%
  - While in Market: 1%

- **YouTube or other online videos**
  - Before Arriving: 5%
  - While in Market: 4%

- **Lifestyle or travel magazines**
  - Before Arriving: 5%
  - While in Market: 5%

- **Newspaper travel section**
  - Before Arriving: 5%
  - While in Market: 1%

- **Radio programming**
  - Before Arriving: 2%
  - While in Market: 3%

- **Gulf to Bay St. Pete/Clearwater Destination Magazine**
  - Before Arriving: 1%
  - While in Market: 2%

- **Travel agency (traditional, offline)**
  - Before Arriving: 1%
  - While in Market: 1%

Base: 2021 - July 443 responses.
Experience Satisfaction / Earned & Paid Media Recall

Overall Satisfaction

- Very satisfied: 96%
- Satisfied: 4%
- Neutral—neither satisfied nor unsatisfied: 0%
- Unsatisfied: 0%
- Very unsatisfied: 0%

Media Recall

- Yes: 52%
- No: 41%
- Maybe/Not sure: 7%

Base: 2021 - July 443 responses.
Likelihood to Recommend / Likelihood to Return

Likelihood to Recommend

9.9 / 10

Likelihood to Return

9.6 / 10

Base: 2021 - July 443 responses.
**Demographics**

- **Gender**
  - Female: 70%
  - Male: 29%
  - Other: 0%
  - I prefer not to answer: 1%

- **Age**
  - Average Age: 46.9

- **Income**
  - Average Income: $109,352

- **Race/Ethnicity**
  - Caucasian: 91%
  - Black/African-American: 4%
  - Latino/Hispanic: 2%
  - Asian/Pacific Islander: 2%
  - American Indian/Alaska Native: 1%
  - Other: 0%
  - I prefer not to answer: 2%

- **Relationship Status**
  - Single: 21%
  - Single with children under 18: 2%
  - Married/partnered: 3%
  - Married/partnered with children under 18: 49%
  - Other: 0%
  - I prefer not to answer: 3%

- **Sexual Orientation**
  - Heterosexual: 96%
  - LGBTQ: 2%
  - Other: 0%
  - I prefer not to answer: 2%

**Base:** 2021 - July 443 responses.
Visit St. Pete Clearwater
Visitor Profile Study
Infographic Profile: 2021 - July 443 responses.
Infographic Profile: 2021 - July 443 responses.

**Domestic vs. International**
- United States Resident: 98%
- International Visitor: 2%

**Point of Origin: Top States**
- Florida: 44%
- Ohio: 5%
- Georgia: 4%

**Factors Important to Destination Decision**
- Beaches that suit my tastes: 31%
- Easy to get to: 23%
- Overall ambiance & atmosphere: 22%
- Attractions in the area: 21%
- Arts & cultural offerings: 20%
- Scenic beauty: 19%

16.4% Millennials
49.3% Gen X
22.7% Baby Boomers
Infographic Profile: 2021 - July 443 responses.

Length of Stay
2.8 Days (on average)

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

Top Communities Visited
- St. Petersburg: 50%
- Clearwater Beach: 46%
- St. Pete Beach: 36%
- Madeira Beach: 34%
- Treasure Island: 22%

Travel Party Size
- 2.9 People
- 32.0% Traveled with Children

Daily Spending
- $102.00 Per Person

Top Activities
- 93% Dining in restaurants
- 59% Shopping
- 54% Visit the beach
- 40% Swimming

Destination Analysts