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 401 for May 2022.
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 Q1 2022

**Average Time Between Q1ision to Visit & Arrival**
- Q1-20: 63.7
- Q1-21: 60.1
- Q1-22: 43.2

**Travel Party Size**
- Q1-20: 2.4
- Q1-22: 2.5
- Q1-20: 2.3

**Average Days & Nights**
- Days:
  - Q1-20: 3.5
  - Q1-21: 3.3
  - Q1-22: 3.1
- Nights:
  - Q1-20: 2.8
  - Q1-21: 2.5
  - Q1-22: 2.5

**Generations**
- Millennial or younger: 51.4%
- Gen X: 45.5%
- Boomer or older: 48.7%

**Average Age**
- Age: 51.1
- Age: 50.8
- Age: 51.9

**Average Daily Spending**
- Q1-22: $266.28
- Q1-21: $268.41
- Q1-20: $197.24

**Percent Staying Overnight**
- Q1-20: 40.5%
- Q1-21: 38.5%
- Q1-22: 44.6%

**Average Income**
- Q1-22: $104,406
- Q1-21: $104,406
- Q1-20: $99,980

- Millennial or younger: 51.4%
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- Boomer or older: 48.7%

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- Average Age: 50.8
- Average Age: 51.9

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- Average Income: $104,406
- Average Income: $104,406
- Average Income: $99,980

- Average Age: 51.1
- Average Age: 50.8
- Average Age: 51.9
### Point of Origin

#### Country of Origin

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>91.1%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>3.6%</td>
</tr>
<tr>
<td>Canada</td>
<td>2.5%</td>
</tr>
<tr>
<td>Germany</td>
<td>1.3%</td>
</tr>
<tr>
<td>France</td>
<td>0.0%</td>
</tr>
<tr>
<td>Mexico</td>
<td>0.0%</td>
</tr>
<tr>
<td>China</td>
<td>0.0%</td>
</tr>
<tr>
<td>Other</td>
<td>1.4%</td>
</tr>
</tbody>
</table>

#### State of Origin

<table>
<thead>
<tr>
<th>State</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Florida</td>
<td>34.3%</td>
</tr>
<tr>
<td>Ohio</td>
<td>8.9%</td>
</tr>
<tr>
<td>Indiana</td>
<td>3.9%</td>
</tr>
<tr>
<td>Illinois</td>
<td>3.6%</td>
</tr>
<tr>
<td>Michigan</td>
<td>3.5%</td>
</tr>
<tr>
<td>Pennsylvania</td>
<td>3.4%</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>3.2%</td>
</tr>
<tr>
<td>Texas</td>
<td>2.9%</td>
</tr>
<tr>
<td>Virginia</td>
<td>2.9%</td>
</tr>
<tr>
<td>New York</td>
<td>2.7%</td>
</tr>
<tr>
<td>Kentucky</td>
<td>2.3%</td>
</tr>
<tr>
<td>Tennessee</td>
<td>2.2%</td>
</tr>
</tbody>
</table>

#### MSA of Origin

<table>
<thead>
<tr>
<th>MSA</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tampa, FL</td>
<td>22.2%</td>
</tr>
<tr>
<td>Lakeland-Winter Haven, FL</td>
<td>5.7%</td>
</tr>
<tr>
<td>Sarasota-Bradenton, FL</td>
<td>4.2%</td>
</tr>
<tr>
<td>Columbus, OH</td>
<td>3.0%</td>
</tr>
<tr>
<td>Washington, DC-MD-VA</td>
<td>3.0%</td>
</tr>
<tr>
<td>Indianapolis, IN</td>
<td>2.8%</td>
</tr>
<tr>
<td>Cincinnati, OH-KY-IN</td>
<td>2.6%</td>
</tr>
<tr>
<td>Fort Lauderdale-Hollywood, FL</td>
<td>2.1%</td>
</tr>
<tr>
<td>Houston, TX</td>
<td>2.1%</td>
</tr>
<tr>
<td>Chicago, IL</td>
<td>2.0%</td>
</tr>
<tr>
<td>Atlanta, GA</td>
<td>1.9%</td>
</tr>
<tr>
<td>Kansas City, MO-KS</td>
<td>1.7%</td>
</tr>
</tbody>
</table>

*Base: 2022 - May 401 responses.*
Lodging Type / Daily Spending in Market

### Lodging Type

- **Hotel, resort or motel in SPC**: 18.9%
- **Home share rental in the SPC**: 3.9%
- **Condo/vacation home in the SPC**: 9.9%
- **Private residence in SPC**: 6.0%
- **Day trip**: 60.9%

### Daily Spending

- **Restaurants**: $119.84
- **Hotel/motel/inn/lodging**: $92.32
- **Retail store purchases**: $57.25
- **Other Entertainment & sightseeing**: $30.29
- **Gas, parking and local transportation**: $18.25
- **Car rental (in area only)**: $1.08
- **Other**: $3.82

**Mean Travel Party Spending = $322.83**

**Avg # of People Covered by Spending = 2.45**

**Mean Spending Per Person = $131.50**

### Days & Nights in St. Pete/Clearwater

#### Days in Market

- **10 or more**: 2.2%
- **9**: 0.9%
- **8**: 1.5%
- **7**: 10.3%
- **6**: 7.7%
- **5**: 6.9%
- **4**: 5.6%
- **3**: 7.3%
- **2**: 4.2%
- **1**: 53.4%

#### Nights in Market

- **10 or more**: 1.6%
- **9**: 0.6%
- **8**: 0.9%
- **7**: 1.8%
- **6**: 9.9%
- **5**: 7.6%
- **4**: 6.9%
- **3**: 5.1%
- **2**: 4.6%
- **1**: 1.0%
- **0**: 59.9%

### Mean Days

- **(≤ 30)** = 2.8
- **(> 30)** = 3.4

### Mean Nights

- **(≤ 30)** = 1.9
- **(> 30)** = 2.4

Primary Reason for Visit / Other Destinations Visited

**Primary Reason for Visit**

- Vacation: 50.6%
- Visit friends or family in the area: 23.6%
- Other personal reasons: 12.0%
- Weekend getaway: 5.2%
- Business: 2.3%
- Attend special event, exhibition or concert: 2.1%
- Wedding: 2.0%
- Conference/tradeshow or other group meeting: 1.0%
- On or pre/post a cruise: 0.6%
- Honeymoon: 0.6%
- Attend sports event/tournament: 0.0%
- Government business/travel: 0.0%

**Other Destinations Visited on SPC Trip**

- Tampa: 38.8%
- Sarasota Area: 14.1%
- Orlando/Disney: 9.7%
- Lakeland/Winter Haven: 4.1%
- Ft. Myers/SW Florida: 2.9%
- Miami: 1.3%
- Kennedy/Space Coast/Cocoa/Melbourne: 1.2%
- Daytona: 0.8%
- Ocala/Gainesville: 0.8%
- Crystal River: 0.7%
- Florida Keys: 0.7%
- Jax/St. Augustine: 0.6%
- Panhandle: 0.5%
- Ft. Lauderdale/Palm Beach: 0.2%
- Sebring: 0.0%
- Tallahassee: 0.0%
- Everglades: 0.0%
- NONE—SPC was my only destination: 35.4%

Method of Arrival / Arrival Airport & Airline

Method of Arrival:
- Personal vehicle: 63.9%
- Airline: 41.5%
- Rental vehicle: 9.7%
- Rideshare (Uber, Lyft, etc.): 1.5%
- RV: 0.4%
- Tour bus: 0.2%
- Taxi or limo: 0.2%
- Train: 0.0%
- Public bus: 0.0%
- Other: 0.0%

Method of Departure:
- Personal vehicle: 66.1%
- Airline: 25.8%
- Rental vehicle: 12.1%
- Rideshare (Uber, Lyft, etc.): 2.0%
- RV: 0.8%
- Tour bus: 0.4%
- Taxi or limo: 0.2%
- Train: 0.0%
- Public bus: 0.0%
- Other: 0.0%

Method of Arrival / Arrival Airport & Airline

Airport of Arrival

- Tampa Int'l.: 61.4%
- Orlando Int'l.: 20.7%
- St. Pete-Clearwater Int'l.: 13.3%
- Sarasota/Bradenton Int'l.: 2.6%
- Sanford Int'l.: 1.3%
- Miami Int'l.: 0.8%
- SW Fl Int'l. (Ft. Myers): 0.0%
- Ft. Lauderdale Int'l.: 0.0%
- Palm Beach Int'l.: 0.0%
- Jacksonville Int'l.: 0.0%
- Other: 0.0%

Airline Used by Airport of Arrival

- Tampa Int'l.: Southwest 28.7%, American Airlines 21.6%, United 20.8%, Allegiant 15.8%, Delta Airlines 5.5%, Jet Blue 0.0%, Sun Country 0.0%, Alaska Airlines 0.0%, Other 7.6%
- St. Pete-Clearwater Int'l.: Southwest 9.8%, Other 88.0%

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

### Rental Vehicle Pick-Up City

- **Tampa**: 60.9%
- **Orlando**: 24.6%
- **St. Petersburg/Clearwater area**: 6.7%
- **Sarasota/Bradenton**: 4.3%
- **Ft. Myers**: 2.1%
- **Miami**: 1.3%
- **Fort Lauderdale**: 0.0%
- **West Palm Beach**: 0.0%
- **Jacksonville**: 0.0%
- **Outside of Florida**: 0.0%
- **Sanford**: 0.0%

### Transportation Used In-Market

- **Personal vehicle**: 70.9%
- **Rental vehicle**: 24.8%
- **Uber, Lyft, etc.**: 4.5%
- **Free Beach Rides**: 1.3%
- **Public bus**: 0.8%
- **RV**: 0.2%
- **Tour bus**: 0.2%
- **Taxi or limo**: 0.0%
- **Bicycle**: 0.0%
- **Motorcycle**: 0.0%
- **Boat**: 0.0%

Travel Party Composition / Travel Party Size

**Travel Party Composition**
- Solo: 17.9%
- Couple: 52.4%
- Immediate Family: 25.4%
- Extended Family: 1.4%
- Group of Couples: 3.7%
- Group of Friends: 13.9%
- Tour Group: 0.2%
- Business Associates: 0.0%
- Other: 0.0%

**Travel Party Size**
- Female adults (18 yrs. +): 1.3
- Male adults (18 yrs. +): 0.9
- Female children (0 to 17 yrs.): 0.2
- Male children (0 to 17 yrs.): 0.2


Avg Travel Party Size = 2.6
Percent with Children = 16.7%
## Important Factors to Destination Decision / Trip Activities

### Important to Decision to Visit

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beaches that suit my tastes</td>
<td>43.3%</td>
</tr>
<tr>
<td>Scenic beauty</td>
<td>38.7%</td>
</tr>
<tr>
<td>Overall ambiance &amp; atmosphere</td>
<td>38.2%</td>
</tr>
<tr>
<td>Weather</td>
<td>30.8%</td>
</tr>
<tr>
<td>Friends or family in the area</td>
<td>30.1%</td>
</tr>
<tr>
<td>Easy to get to</td>
<td>28.1%</td>
</tr>
<tr>
<td>&quot;Restaurants, cuisine, food scene&quot;</td>
<td>24.8%</td>
</tr>
<tr>
<td>Recommendation from people I…</td>
<td>23.4%</td>
</tr>
<tr>
<td>Attractions in the area</td>
<td>17.7%</td>
</tr>
<tr>
<td>Shopping opportunities</td>
<td>12.9%</td>
</tr>
<tr>
<td>St. Pete Pier</td>
<td>8.1%</td>
</tr>
<tr>
<td>Arts &amp; cultural offerings</td>
<td>8.1%</td>
</tr>
<tr>
<td>Outdoor recreational opportunities</td>
<td>5.4%</td>
</tr>
<tr>
<td>The SPC area is family-friendly</td>
<td>4.4%</td>
</tr>
<tr>
<td>Appealing hotels/resorts</td>
<td>3.3%</td>
</tr>
</tbody>
</table>

### Trip Activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dining in restaurants</td>
<td>90.0%</td>
</tr>
<tr>
<td>Visit the beach</td>
<td>82.2%</td>
</tr>
<tr>
<td>Shopping</td>
<td>66.7%</td>
</tr>
<tr>
<td>Swimming</td>
<td>48.8%</td>
</tr>
<tr>
<td>Photography</td>
<td>33.2%</td>
</tr>
<tr>
<td>Visit friends or family</td>
<td>31.8%</td>
</tr>
<tr>
<td>Visit museums</td>
<td>20.8%</td>
</tr>
<tr>
<td>Guided tour</td>
<td>15.9%</td>
</tr>
<tr>
<td>Other boating</td>
<td>11.7%</td>
</tr>
<tr>
<td>Shelling</td>
<td>7.3%</td>
</tr>
<tr>
<td>Bars/Nightlife</td>
<td>5.6%</td>
</tr>
<tr>
<td>Fishing</td>
<td>5.1%</td>
</tr>
<tr>
<td>Jet skiing</td>
<td>5.0%</td>
</tr>
<tr>
<td>Take a dining cruise</td>
<td>3.3%</td>
</tr>
<tr>
<td>Attend a festival or special event</td>
<td>3.1%</td>
</tr>
</tbody>
</table>

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

First Time Visitors to Florida
- Yes: 14.7%
- No: 85.3%

Previous Visitation to the St. Pete/Clearwater Area
- First Time Visitor: 32.5%
- 1 - 10 Previous Visits: 45.9%
- 11 - 20 Previous Visits: 9.8%
- More than 20 Visits: 11.7%

Mean # of Past Trips = 7.0

### Attractions Visited

<table>
<thead>
<tr>
<th>Attraction</th>
<th>Visited Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>St. Pete Pier</td>
<td>17.8%</td>
</tr>
<tr>
<td>Dali Art Museum</td>
<td>10.6%</td>
</tr>
<tr>
<td>Chihuly Exhibit</td>
<td>7.5%</td>
</tr>
<tr>
<td>Orlando area Theme Parks</td>
<td>6.3%</td>
</tr>
<tr>
<td>Clearwater Marine Aquarium</td>
<td>3.2%</td>
</tr>
<tr>
<td>Tarpon Springs</td>
<td>3.0%</td>
</tr>
<tr>
<td>Florida Aquarium in Tampa</td>
<td>2.3%</td>
</tr>
<tr>
<td>Sunken Gardens</td>
<td>1.3%</td>
</tr>
<tr>
<td>Ft. Desoto Park</td>
<td>1.1%</td>
</tr>
<tr>
<td>Caladesi Island</td>
<td>1.0%</td>
</tr>
<tr>
<td>Other</td>
<td>0.9%</td>
</tr>
<tr>
<td>NONE OF THESE</td>
<td>66.5%</td>
</tr>
</tbody>
</table>

### Communities Visited

<table>
<thead>
<tr>
<th>Community</th>
<th>Visited Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Madeira Beach</td>
<td>48.5%</td>
</tr>
<tr>
<td>Clearwater Beach</td>
<td>46.3%</td>
</tr>
<tr>
<td>St. Petersburg</td>
<td>29.0%</td>
</tr>
<tr>
<td>Treasure Island</td>
<td>18.8%</td>
</tr>
<tr>
<td>St. Pete Beach</td>
<td>16.5%</td>
</tr>
<tr>
<td>Indian Shores &amp; Indian Rocks…</td>
<td>11.6%</td>
</tr>
<tr>
<td>North Redington…</td>
<td>8.8%</td>
</tr>
<tr>
<td>Dunedin</td>
<td>4.8%</td>
</tr>
<tr>
<td>Seminole</td>
<td>4.7%</td>
</tr>
<tr>
<td>Tarpon Springs</td>
<td>4.7%</td>
</tr>
<tr>
<td>Clearwater</td>
<td>3.8%</td>
</tr>
<tr>
<td>Largo</td>
<td>3.3%</td>
</tr>
<tr>
<td>Pass-A-Grille Beach</td>
<td>2.6%</td>
</tr>
<tr>
<td>Palm Harbor</td>
<td>2.3%</td>
</tr>
<tr>
<td>Tierra Verde</td>
<td>2.1%</td>
</tr>
</tbody>
</table>

Most Liked Aspects of SPC (Unaided)

- Beaches / Ocean: 54.1%
- Everything: 35.3%
- Scenic Beauty: 26.4%
- Tropical Climate / Warm Weather: 22.4%
- Friendly People: 9.0%
- Relieving Atmosphere / Ambiance: 8.3%
- Entertainment / Variety of Fun…: 8.3%
- "Attractions (Museums,…: 8.1%
- Clean: 7.1%
- Food / Restaurants & Bars: 6.1%
- Accessible / Convenient / Walkable: 4.8%
- Shopping: 3.8%
- Safe: 2.9%
- Great Location / Easy to get to: 1.7%
- Family Friendly: 0.5%

Feelings in SPC Area (Unaided)

- Calm / Relaxed: 52.6%
- Happy: 32.7%
- Amazing: 12.9%
- Fine / Good: 3.9%
- Refreshed / Healthy: 1.8%
- Energized / Excited: 1.0%
- Welcomed: 0.7%
- Comfortable: 0.6%
- Safe: 0.5%
- Warm: 0.3%

Attractions or Services that Would Enhance the Destination Experience

Additional Attractions or Services (Unaided)

- It needs no improvement: 84.3%
- Cheaper & More Parking: 13.1%
- Less congestion / traffic: 1.1%
- Tourist Information: 0.6%
- More Public Transportation Options: 0.4%
- More Affordable: 0.2%
- More beach & boardwalk rentals: 0.2%
- Bars and food options on the beach: 0.1%
- Finish the Pier: 0.0%
- Restaurant Diversity: 0.0%
- More public restrooms: 0.0%
- More shaded / green areas: 0.0%
- More Shopping: 0.0%
- Better Signage /accessibility: 0.0%
- More kid friendly activities: 0.0%

When Decision to Visit was Made / Travel Planning Resources Used

Average Time Between Decision to Visit and Arrival

- **62.4 Days in Advance**

Resources Used before Arrival and While In Market

- **Before Arriving**
  - Social Media content: 45.7%
  - Opinions of friends or relatives: 39.9%
  - Online travel agencies (Expedia, Travelocity, etc.): 39.8%
  - User-generated content/Review websites, such as Yelp and TripAdvisor: 39.3%
  - Official St. Petersburg/Clearwater area tourism website, www.VisitStPeteClearwater.com: 39.0%
  - Travel guides, brochures: 17.7%
  - Television programming: 11.0%
  - Travel agency (traditional, offline): 10.0%
  - Radio programming: 2.9%
  - YouTube or other online videos: 1.2%
  - Gulf to Bay St. Pete/Clearwater Destination Magazine: 1.1%
  - Newspaper travel section: 0.6%
  - Lifestyle or travel magazines: 0.2%

- **While in St. Pete/Clearwater Area**
  - Social Media content: 40.6%
  - Opinions of friends or relatives: 24.2%
  - Online travel agencies (Expedia, Travelocity, etc.): 23.8%
  - User-generated content/Review websites, such as Yelp and TripAdvisor: 23.3%
  - Travel guides, brochures: 17.7%
  - Television programming: 11.0%
  - Travel agency (traditional, offline): 10.0%
  - Radio programming: 2.9%
  - YouTube or other online videos: 1.2%
  - Gulf to Bay St. Pete/Clearwater Destination Magazine: 1.1%
  - Newspaper travel section: 0.6%
  - Lifestyle or travel magazines: 0.2%

Experience Satisfaction / Earned & Paid Media Recall

**Overall Satisfaction**
- Very satisfied: 96.5%
- Satisfied: 2.8%
- Neutral—neither satisfied nor unsatisfied: 0.7%
- Unsatisfied: 0.0%
- Very unsatisfied: 0.0%

**Media Recall**
- Yes: 33.6%
- No: 63.9%
- Maybe/Not sure: 2.5%

Likelihood to Recommend / Likelihood to Return

Demographics

- Female: 76.7%
- Male: 22.2%
- I prefer not to answer: 1.2%

Average Age: 46.6

Average Income: $14

Race/Ethnicity:
- Caucasian: 87.3%
- Latino/Hispanic: 4.2%
- Black/African-American: 3.2%
- American Indian/Alaska Native: 0.5%
- Asian/Pacific Islander: 0.1%
- Other: 2.3%
- I prefer not to answer: 2.3%

Marital Status:
- Single: 22.2%
- Single with children under 18: 1.1%
- Married/partnered: 51.0%
- Married/partnered with children under 18: 17.3%
- Other: 5.4%
- I prefer not to answer: 2.9%

Sexual Orientation:
- Heterosexual: 95.4%
- LGBTQ: 1.4%
- I prefer not to answer: 3.2%

Visit St. Pete Clearwater
Visitor Profile Study
Infographic Profile: 2022 - May 401 responses.
Infographic Profile: 2022 - May 401 responses.

- **Domestic vs. International**
  - United States Resident 91.1%
  - International Visitor 8.9%

- **Point of Origin: Top States**
  - Florida: 34.3%
  - Ohio: 8.9%
  - Indiana: 3.9%

- **Factors Important to Destination Decision**
  - Beaches that suit my tastes: 43.3%
  - Scenic beauty: 38.7%
  - Overall ambiance & atmosphere: 38.2%
  - Weather: 30.8%
  - Friends or family in the area: 30.1%
  - Easy to get to: 28.1%
Infographic Profile: 2022 - May 401 responses.

Length of Stay
2.8 Days (on average)

Seasonality of Visit
- Jan-Mar: 0.0%
- Apr-Jun: 100.0%
- Jul-Sept: 0.0%
- Oct-Dec: 0.0%

Travel Party Size
- 2.6 People
- 16.7% Traveled with Children

Daily Spending
- $131.50 Per Person

Top Communities Visited
- Madeira Beach: 57.4%
- Clearwater Beach: 50.4%
- St. Petersburg: 34.2%
- Treasure Island: 33.4%
- St. Pete Beach: 27.4%

Top Activities
- Dining in restaurants: 90.0%
- Visit the beach: 82.2%
- Shopping: 66.7%
- Swimming: 48.8%