THE Pensacola EXPERIENCE

Visitor Insights

MAJORITY OPINION RESEARCH

December 2019

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Purpose and Methodology

The purpose of this marketing research is to track visitor profiles, behaviors and experiences associated with visiting Pensacola (Pensacola, Pensacola Beach and Perdido Key).

Visitors throughout the destination are interviewed by interviewers on the ground with iPads programmed with the questionnaire. 300 interviews per month, 900 per season and 3,600 annually are sought and distributed across many locations within the destination:

Pensacola
- Historic Pensacola Village
- Palafox Street
- Saturday Farmer's Market

Pensacola Beach
- Casino Beach Area
- Pensacola Beach (on the beach)
- Pensacola Beach Boardwalk

Perdido Key
- Perdido Key (on the beach)
- Perdido Key State Park

Pensacola International Airport

Pensacola Lighthouse

Naval Aviation Museum

Insight Headlines

December 2019:

- Mobile, Montgomery, and Atlanta were the top 3 feeder markets for visitation this December and all three of these markets were in the top 5 last December. At the same time, six top 10 markets were not in the top 10 last December (Raleigh-Durham, NC; New York, NY; Austin, TX; Champaign, IL; Denver, CO; and, Lafayette, LA).
- The average visitor was 41 years old, which is younger than last December. Within this, there was a significant increase in Centennials and Millennials and a corresponding decrease in Generation X.
- With incomes of nearly $94K, visitors were, on average, about 17% less affluent this December vs last.
- Party sizes were smaller this December vs last and visitor mix was more 'ethnically diverse' than last December.
- 54% of visitors stayed in paid accommodations (significantly less than last December, but the average length of stay (8.0 nights) was almost 2 nights longer than last December).
- 54% of visitors recalled Visit Pensacola marketing communications (less than last December).
- On average, trips were planned and booked in much shorter windows than last December.
- There was more beach going, shopping and attending ticketed events this December vs last, but less fine dining, visits to museums or art galleries, and fishing.
- Average December spend per party was $952 (40% less than last December); average spend per day was $119 (51% less than last December).

Year-to-Date (Calendar Year 2019):

- Mobile, Atlanta, Birmingham, and New Orleans were, in order, the top 4 feeder markets for 2018 and 2019.
- The visitor mix is trending younger with more Centennials and Millennials and less Generation X and Baby Boomers.
- Household incomes are trending lower.
- Party sizes and traveling with children are fairly stable, but the visitor mix is trending more ethnic in nature.
- Visiting family and friends in Pensacola is on the increase and, as such, staying in paid accommodations is trending down, as is, slightly, length of stay.
- In accordance with the downward trend of staying in paid accommodations, spend per party and per day has trended down.
- Recall of marketing communications among visitors has increased over the last year among all communication vehicles.
- Visitors remain overwhelmingly likely to return and recommend Pensacola as a place to visit.

Visitor Insights Dashboard

Metric	December 2019	Trend
Stayed in paid accommodations	54%	↓
Average length of stay (nights)	8.0	↑
Average party size (people)	2.7	↓
Average spend per party	$952	↓
Average spend per day	$119	↓
Communications recall	54%	↓
First time visitors	34%	↓

Metric	CY 2019	Trend
Stayed in paid accommodations	64%	↓
Average length of stay (nights)	6.0	↓
Average party size (people)	3.2	↓
Average spend per party	$1,293	↓
Average spend per day	$216	↓
Communications recall	70%	↑
First time visitors	27%	↓

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Visitor Demographics

	December 2018	December 2019	YTD 2018	YTD 2019
Average Age	45	**41**	45	**44**
Centennials (1996-)	4%	**12%**	3%	**5%**
Millennials (1977-1995)	35%	**43%**	38%	**44%**
Generation X (1965-1976)	29%	**16%**	27%	**22%**
Baby Boomers (1946-1964)	29%	**28%**	30%	**27%**
Silent Generation (before 1946)	3%	**2%**	3%	**2%**
Average Household Income	$113,285	**$93,710**	$95,186	**$84,115**
Average Party Size	3.4	**2.7**	3.5	**3.2**
Traveled with Children < 18	25%	**25%**	28%	**28%**
First Time Visitor	36%	**34%**	35%	**27%**
Caucasian/White	88%	**76%**	82%	**76%**
African-American/Black	5%	**13%**	8%	**15%**
Hispanic	2%	**1%**	4%	**5%**
Any other race or ethnicity	5%	**10%**	6%	**4%**

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Top 10 Visitor Origins

Arrival by Air — December 2019: 36% YTD: 22%

Arrival by Car — December 2019: 64% YTD: 78%

December 2018	**December 2019**	YTD 2018	**YTD 2019**
Mobile, AL	**Mobile, AL**	Mobile, AL	**Mobile, AL**
Birmingham, AL	**Montgomery, AL**	Atlanta, GA	**Atlanta, GA**
Montgomery, AL	**Atlanta, GA**	Birmingham, AL	**Birmingham, AL**
Atlanta, GA	**Jacksonville, FL**	New Orleans, LA	**New Orleans, LA**
Nashville, TN	**Raleigh-Durham, NC**	Dallas-Ft. Worth, TX	**Biloxi-Gulfport, MS**
Orlando, FL	**New York, NY**	Nashville, TN	**Tallahassee, FL**
Jacksonville, FL	**Austin, TX**	Montgomery, AL	**Nashville, TN**
Columbus, GA	**Champaign, IL**	Columbus, GA	**Montgomery, AL**
Tallahassee, FL	**Denver, CO**	Chicago, IL	**Panama City, FL**
Huntsville-Decatur, AL	**Lafayette, LA**	Memphis, TN	**Jacksonville, FL**

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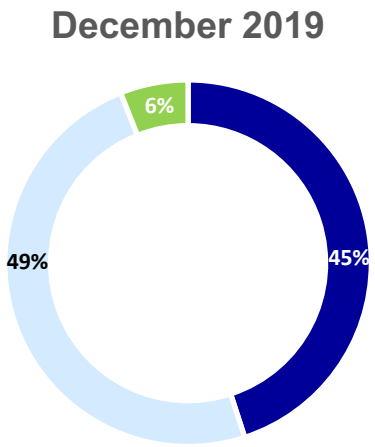
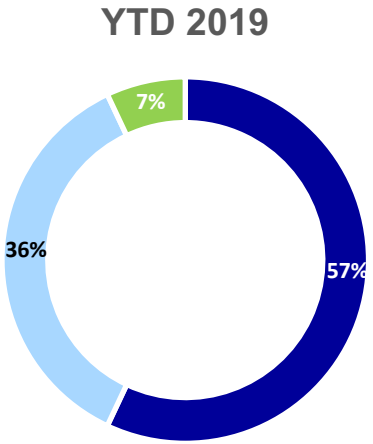
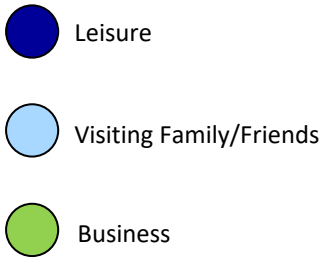
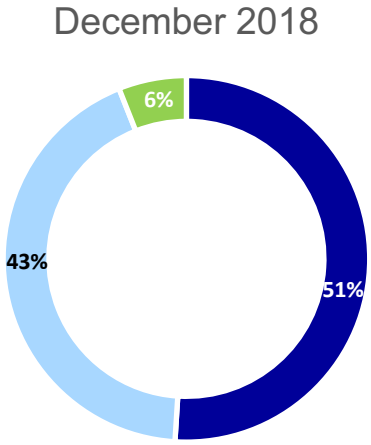
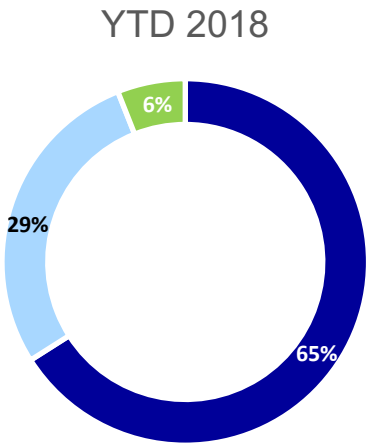
Primary Reason for Visit











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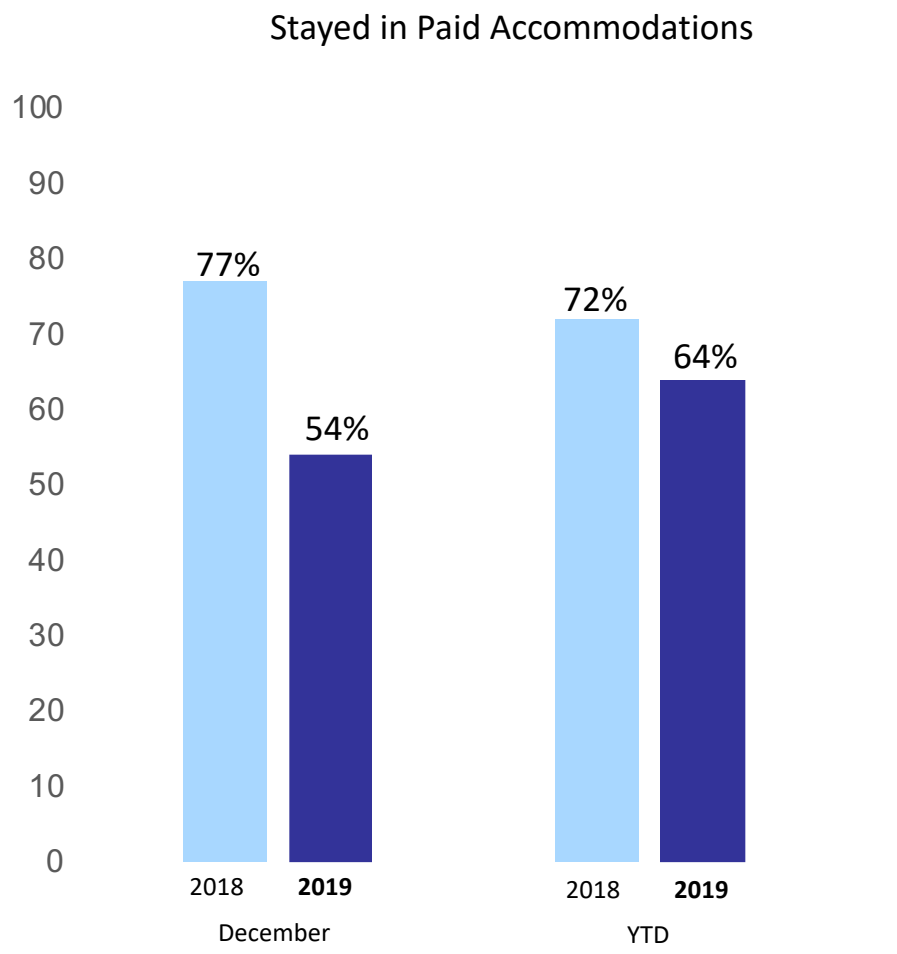
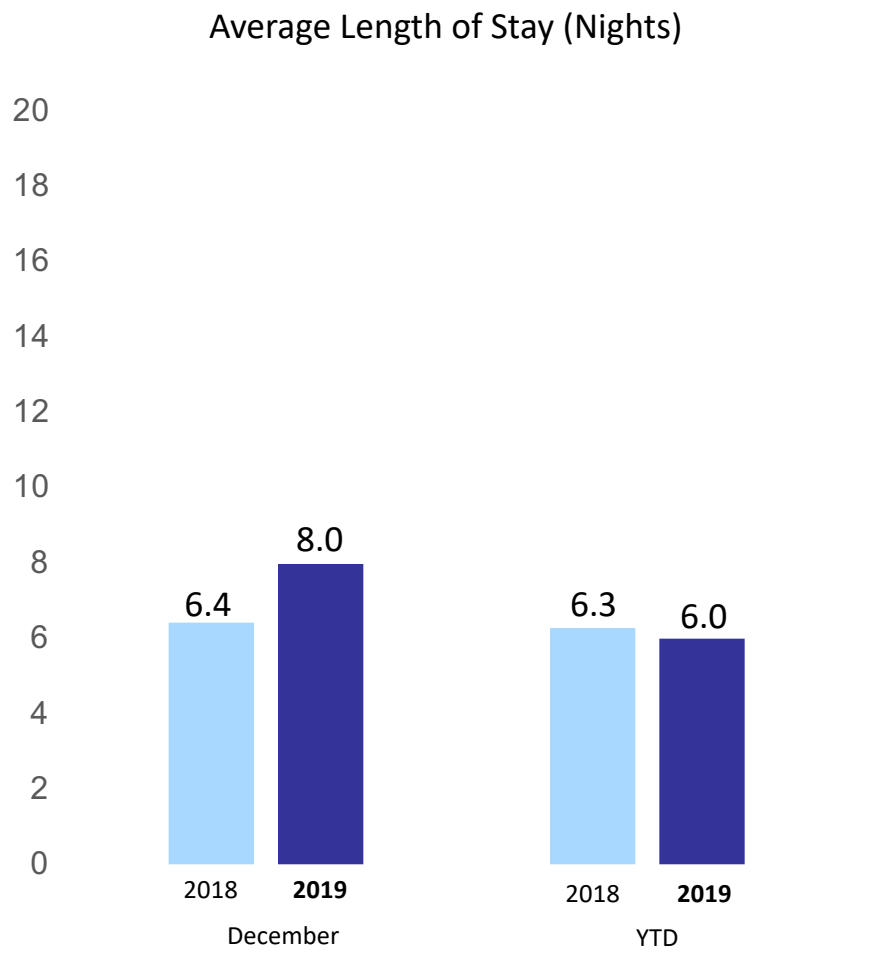
Lodging





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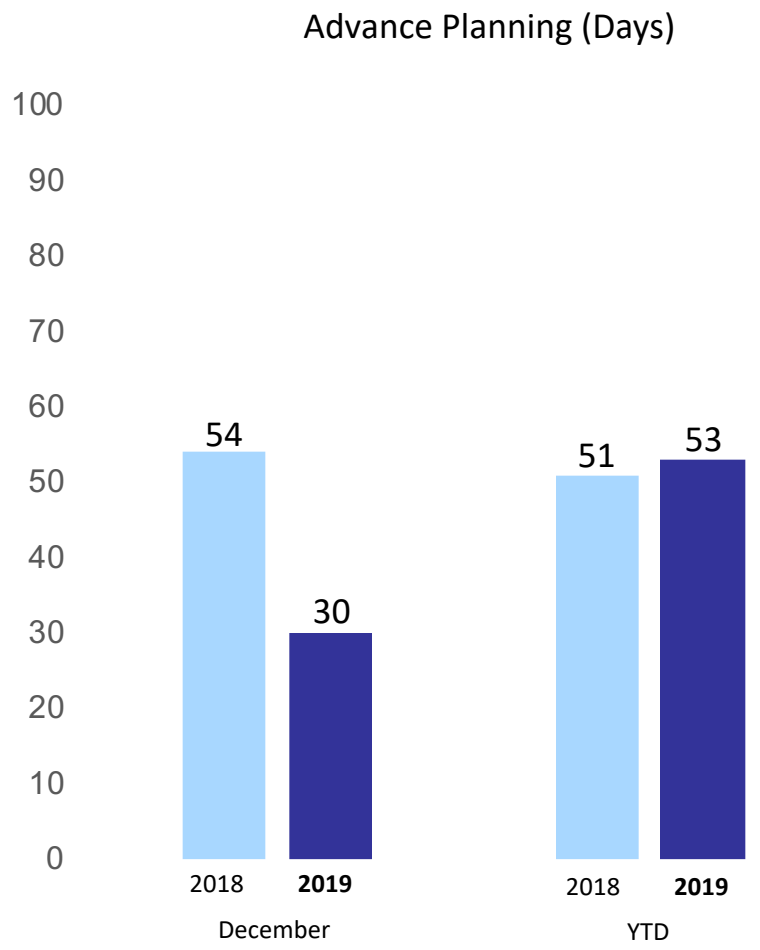
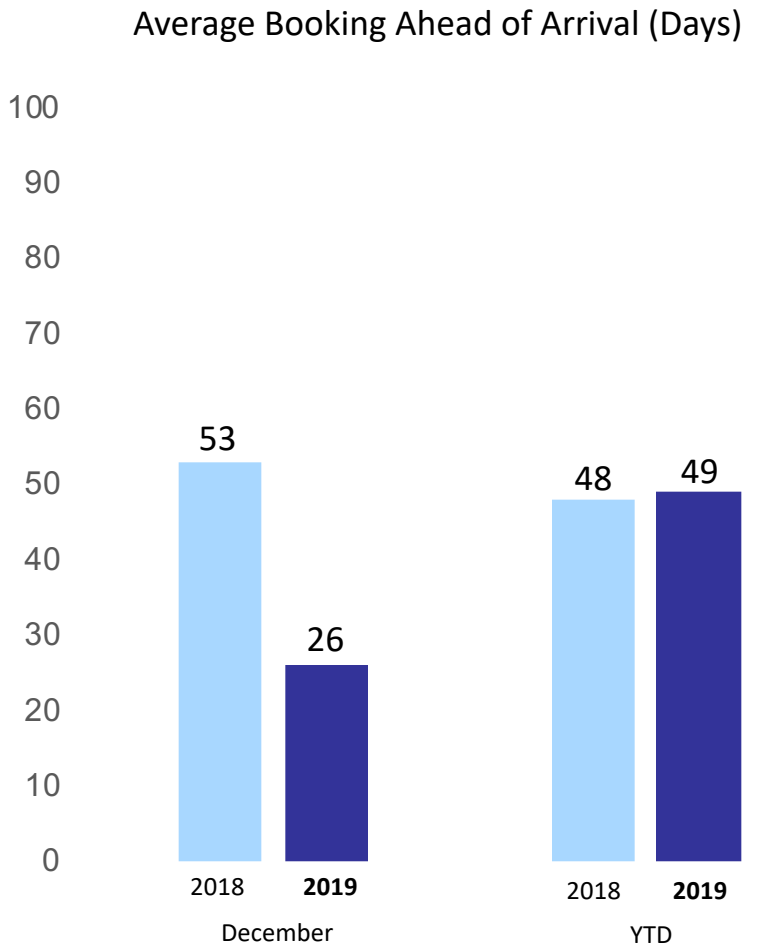
Planning and Booking





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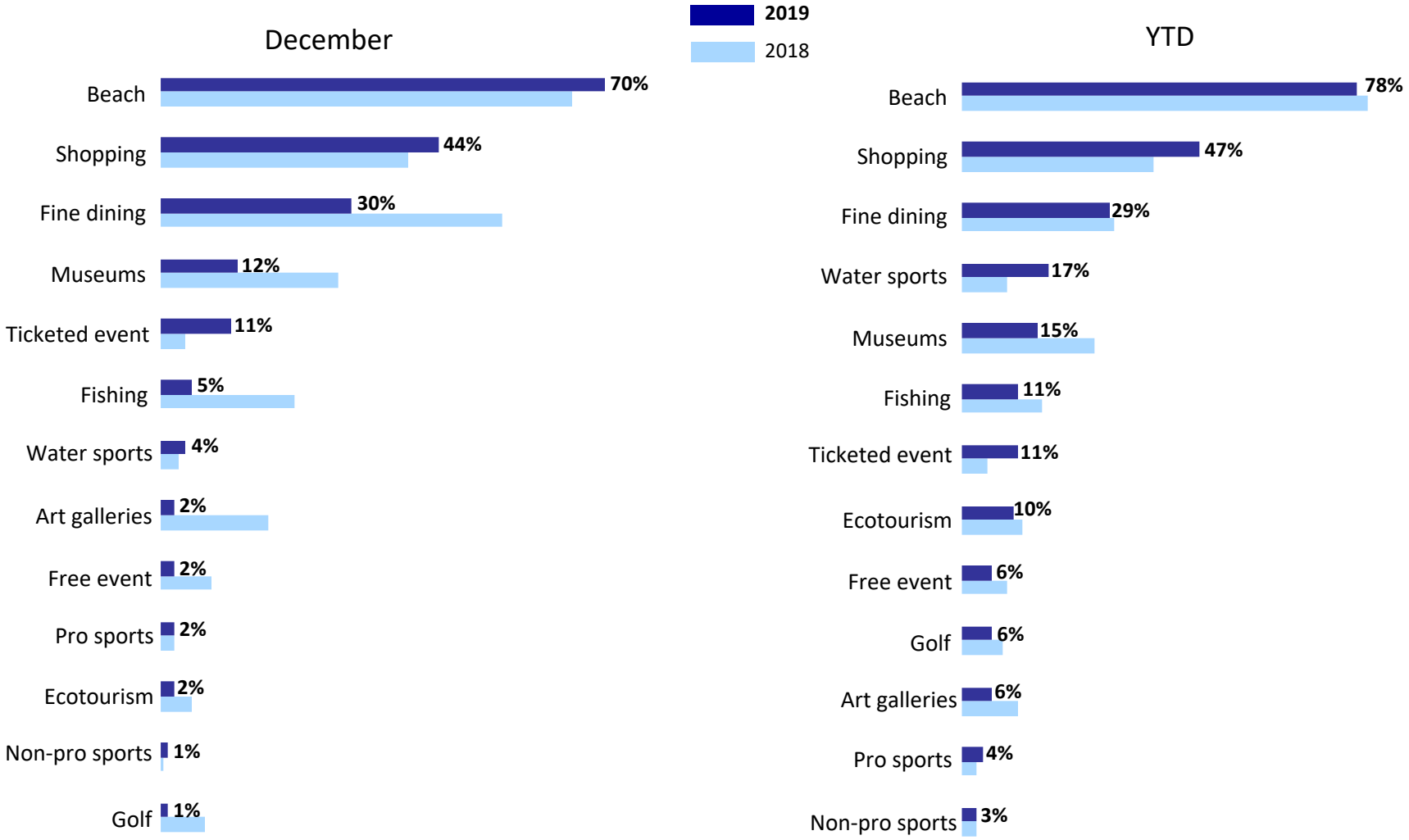
Activities



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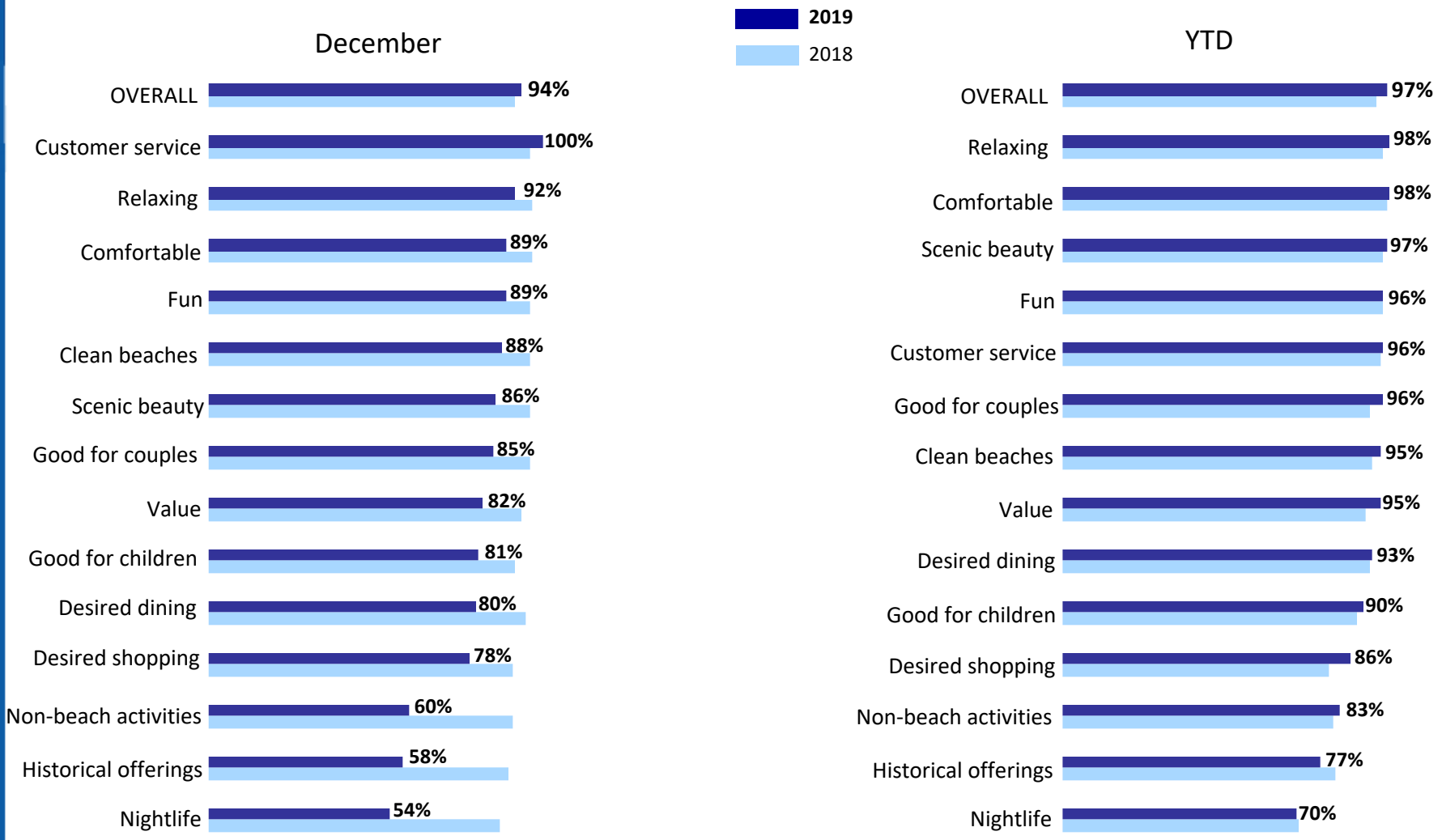
In Destination Experience



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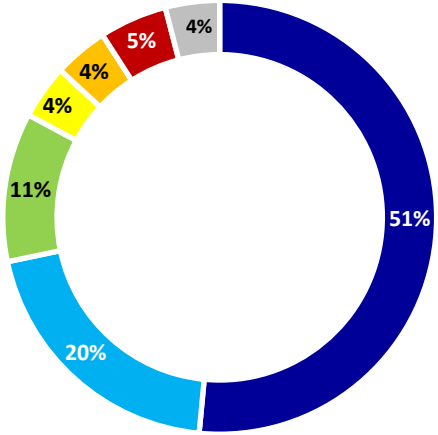
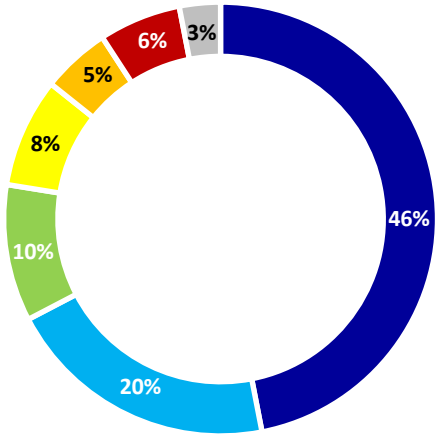
Visitor Spending

	December 2018	**December 2019**	YTD 2018	**YTD 2019**
Average per Party	$1,574	**$952**	$1,572	**$1,293**
Average per Day	$244	**$119**	$250	**$216**

December 2019 Allocation



YTD 2019 Allocation



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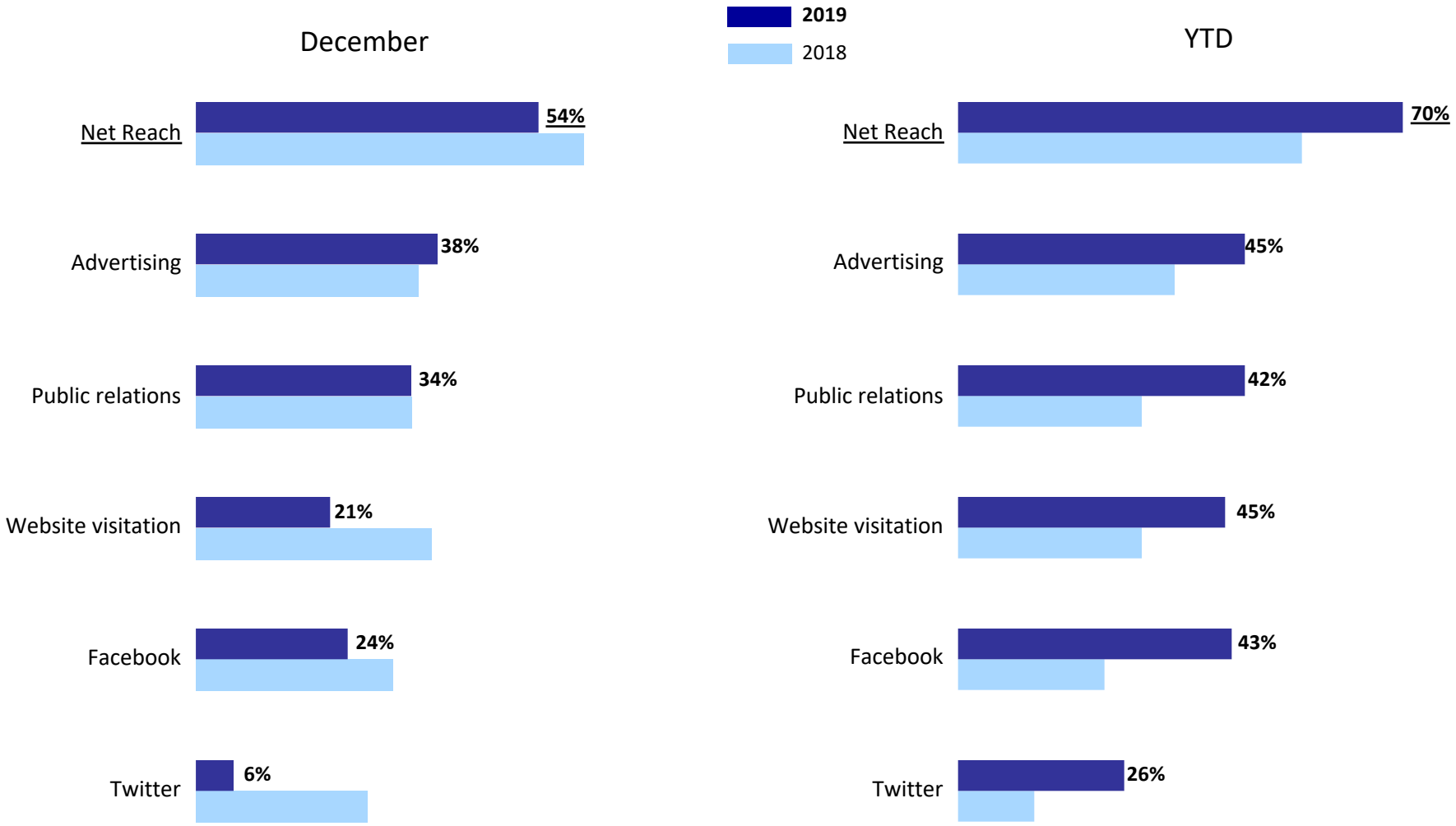
Past 12 Month Communications Recall



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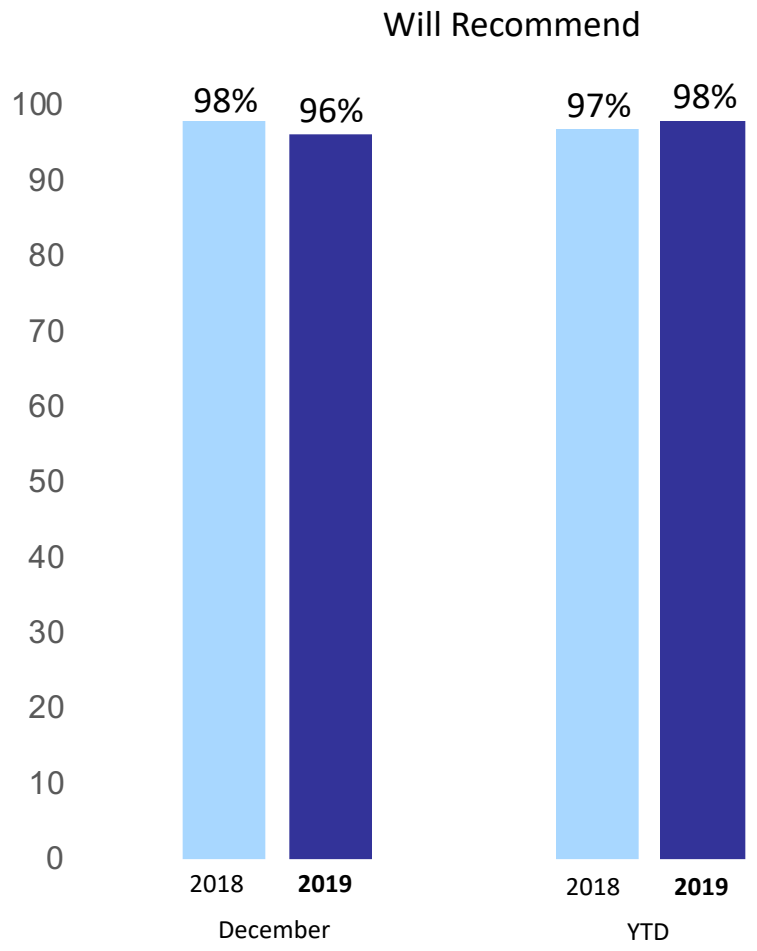
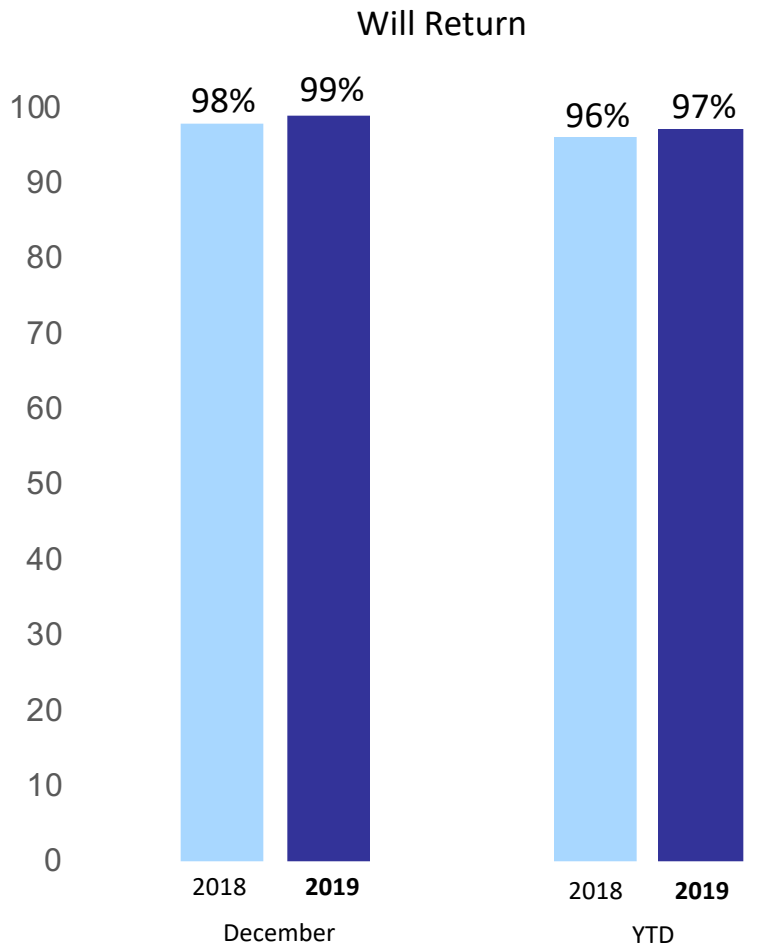
Recommendations and Returns





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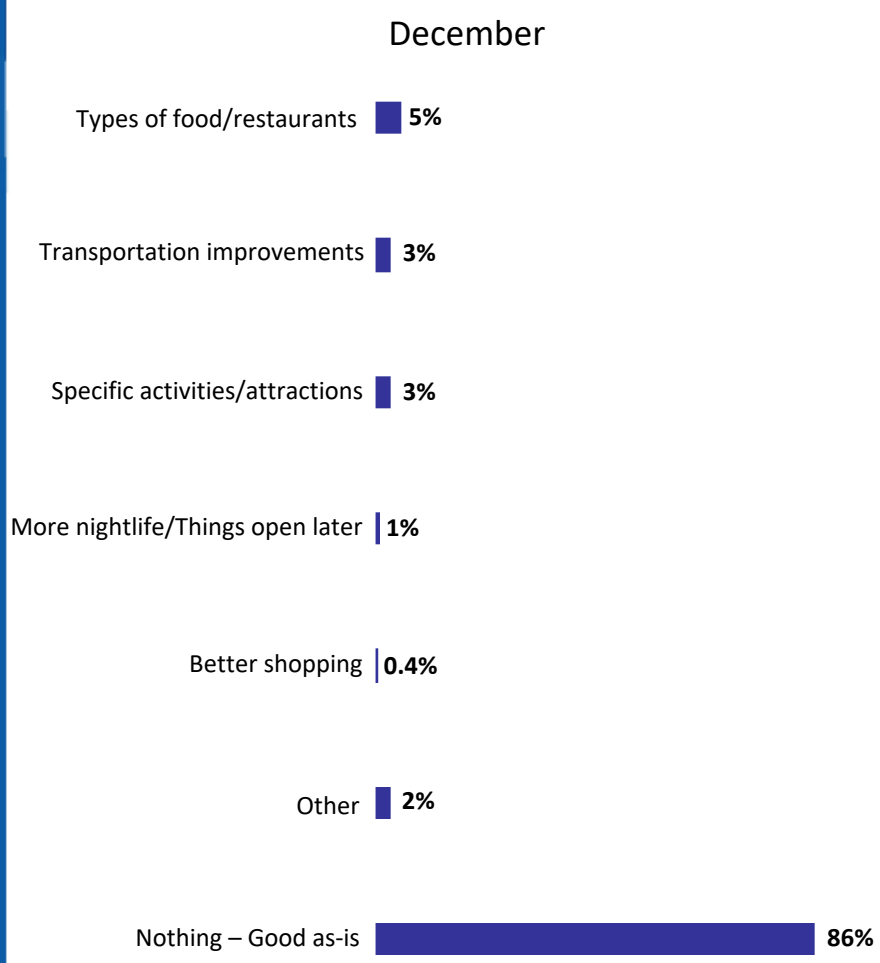
Would Improve Destination Experience



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First asked October 2019

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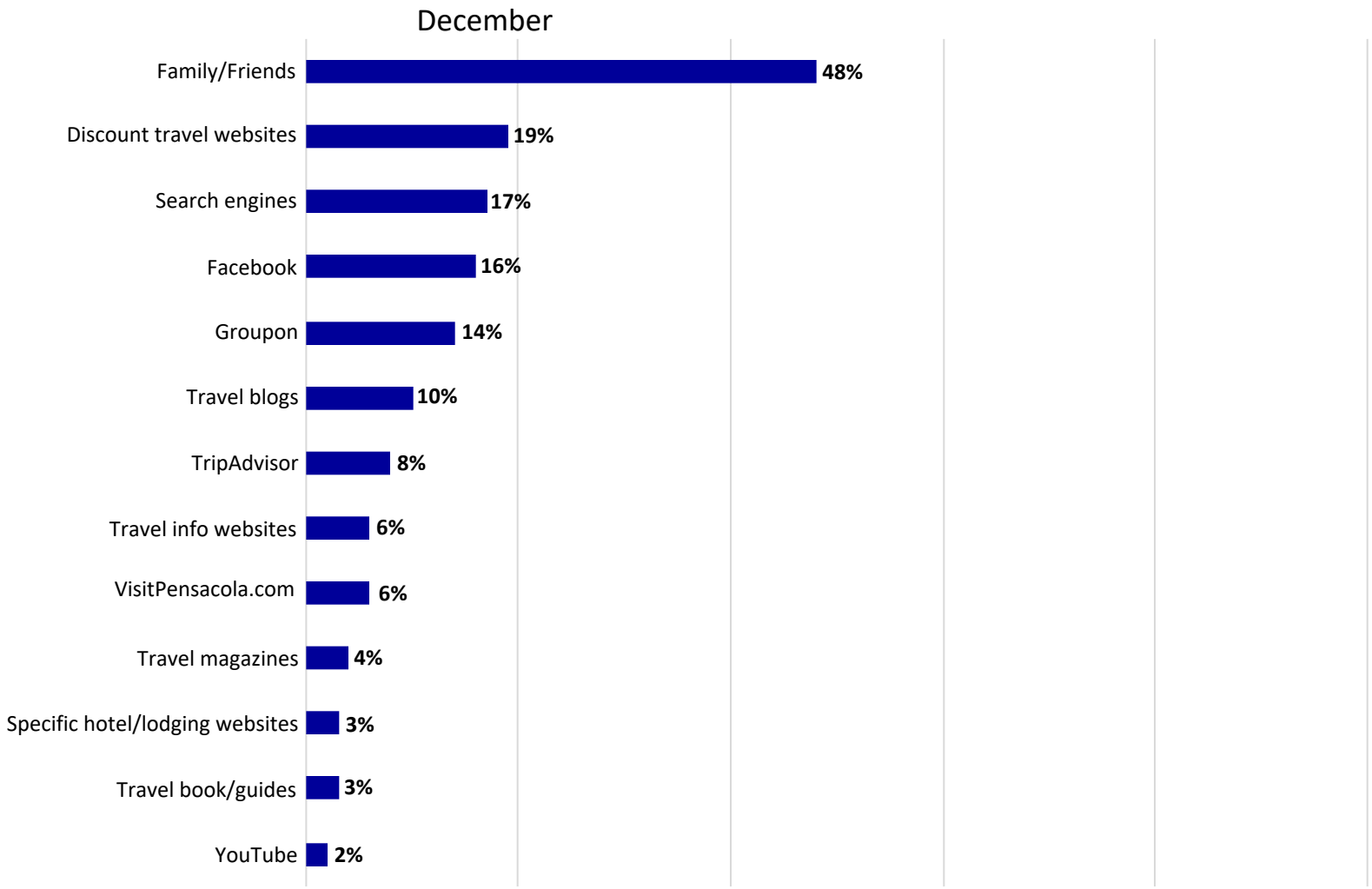
Travel Info Sources Consulted



First asked November 2019

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For Additional Information Contact:

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