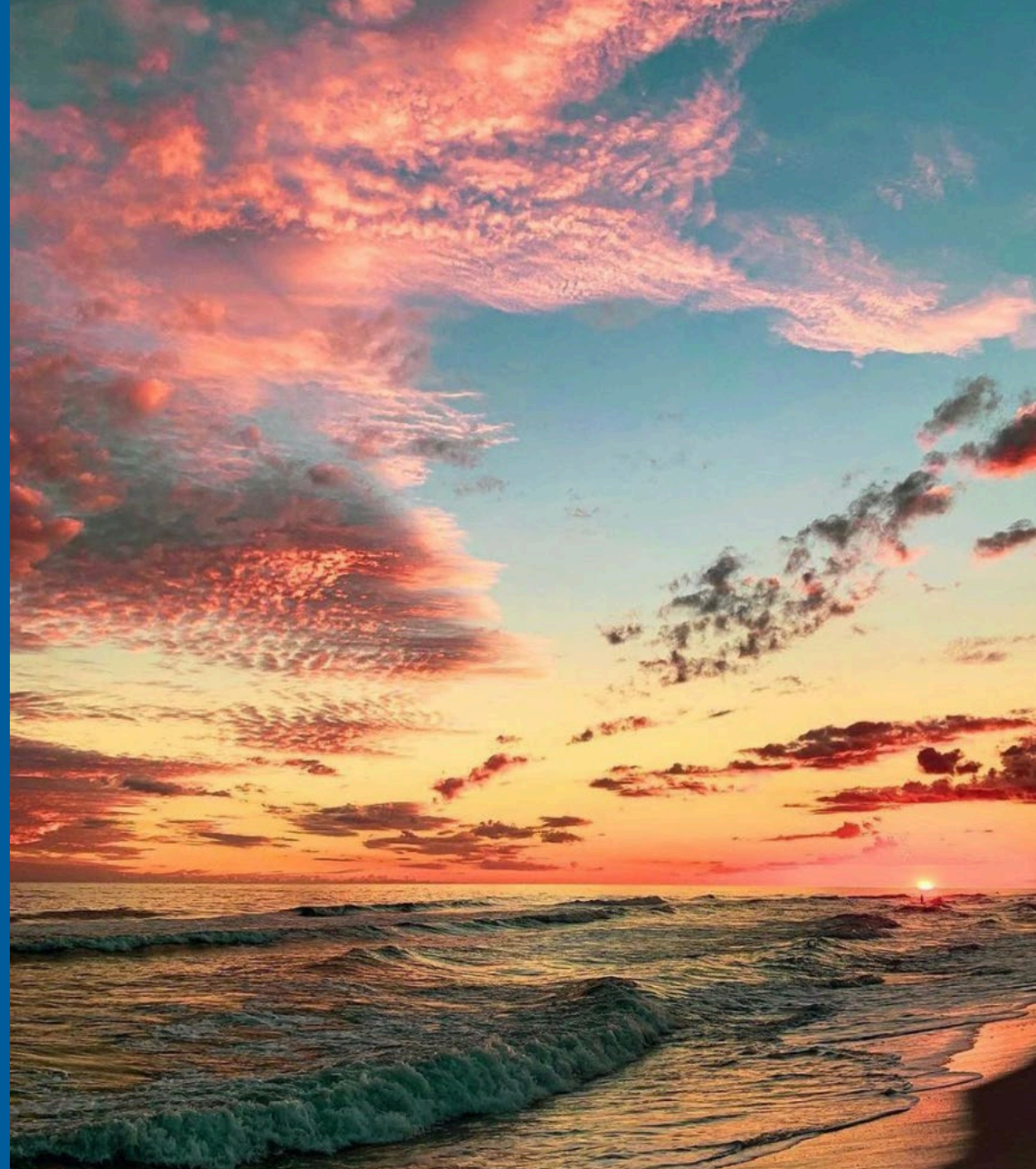


VISIT PENSACOLA

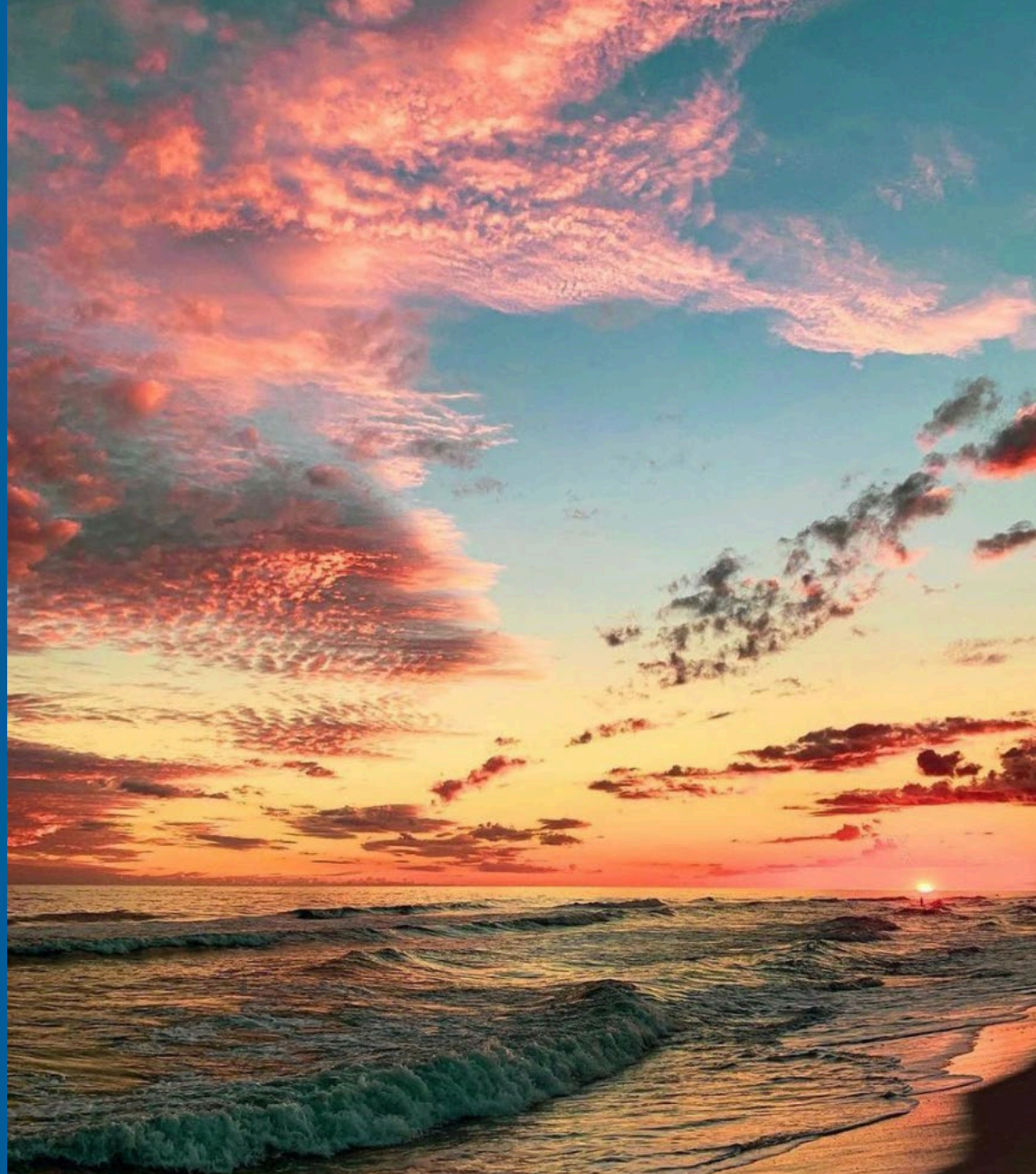
Visitor Tracking Study
April – June 2025



STUDY OBJECTIVES: VISITOR JOURNEY





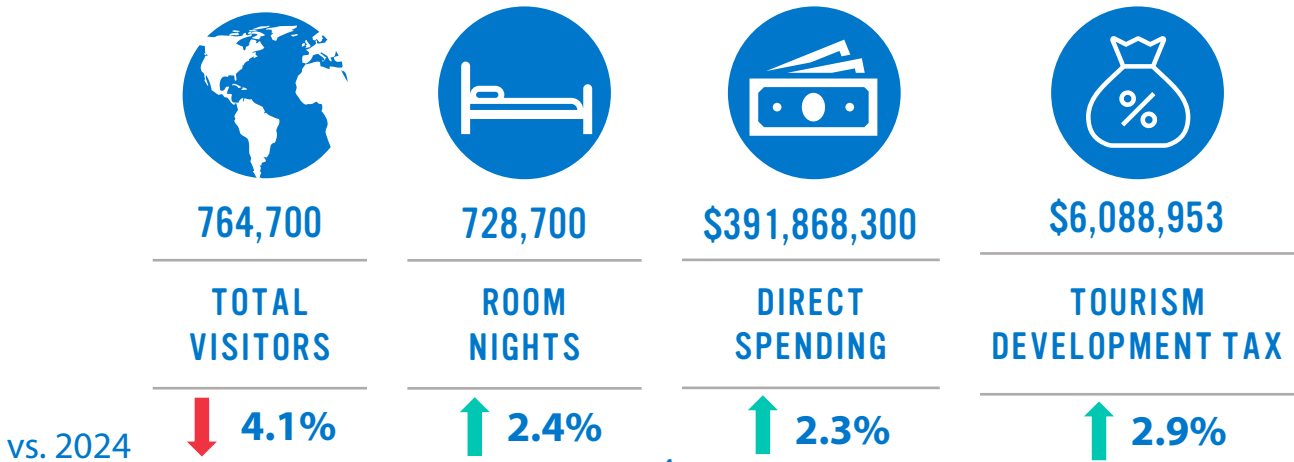
EXECUTIVE SUMMARY



QUARTERLY SNAPSHOT: APRIL-JUNE 2025

COMPARED TO APRIL - JUNE 2024, IN APRIL - JUNE 2025...

-  **Occupancy** was up **+0.7%** and **ADR** was up **+1.6%**, resulting in a **RevPAR** that was up **+2.3%**.
-  Smaller travel party sizes and fewer visitors staying with friends/relatives or in their second homes contributed to a **decrease in overall visitation (-4.1%)**.
-  Visitors have a **longer trip planning window** of about **64 days** in advance **(+8 days longer than last year)**.
-  More visitors **recalled advertising** about the Pensacola area **(+7% points)** and of those visitors who recalled advertising, they were more likely to see it on a **VisitPensacola.com (+15% points)** and **traveler reviews/blogs (+7% points)**.
-  Visitors were more likely to **travel with children under the age of 20 (+4% points)**.
-  An increase in **ADR (+1.6%)** contributed to the increase in **TDT (+2.9%)**.
-  Visitor **spending** was up **+2.3%** with a **higher yield per visitor (+6.6%)**.
-  More visitors used **VisitPensacola.com (+6% points)** and **friends/family (+6% points)** to plan their trip.
-  Advertising influenced **17% of all visitors** to come to the Pensacola area **(+5% points)**.
-  There was an increase in **repeat visitors** as **32%** of visitors have visited the Pensacola area **more than 10 times (+7% points)**.



VISITOR JOURNEY: ECONOMIC IMPACT



KEY PERFORMANCE INDICATORS

APRIL TO JUNE 2025

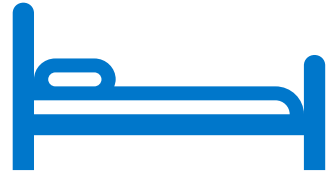


764,700

TOTAL
VISITORS¹

vs. 2024

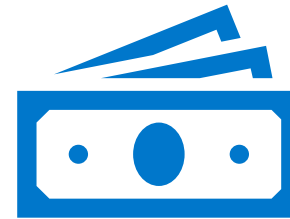
↓ 4.1%



728,700

ROOM
NIGHTS

↑ 2.4%



\$391,868,300

DIRECT
SPENDING

↑ 2.3%

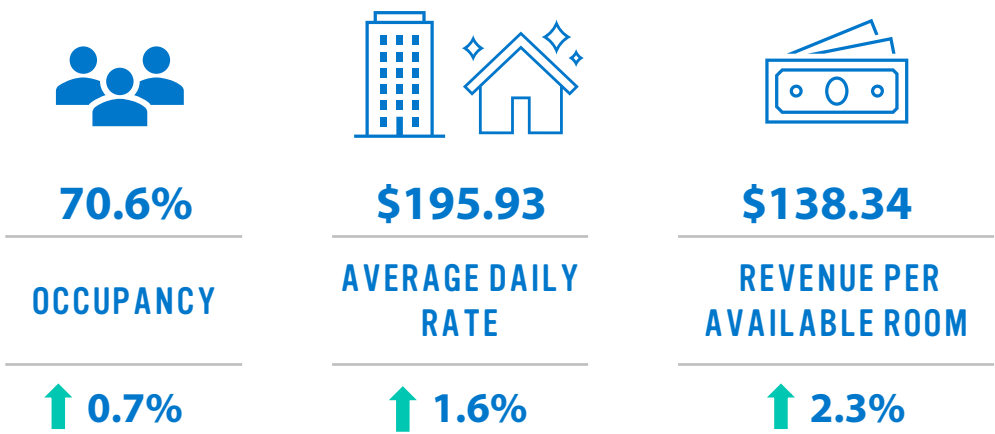


\$6,088,953

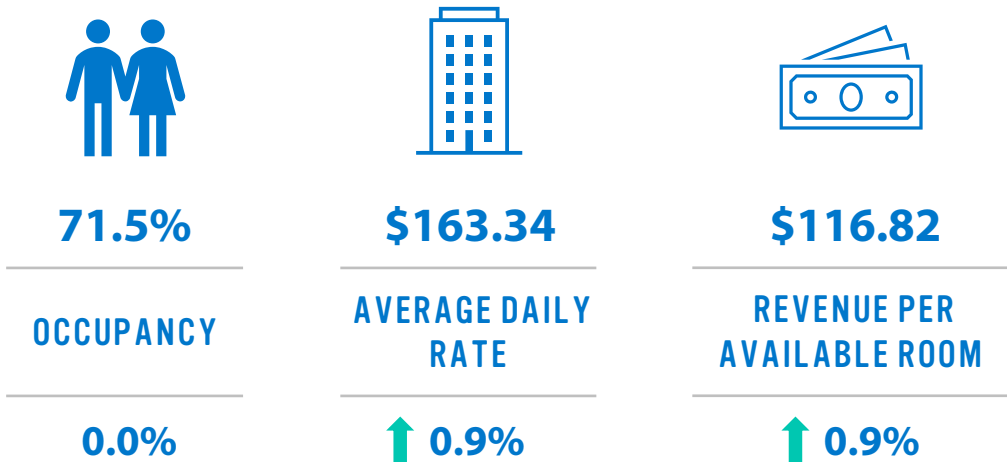
TOURISM
DEVELOPMENT TAX²

↑ 2.9%

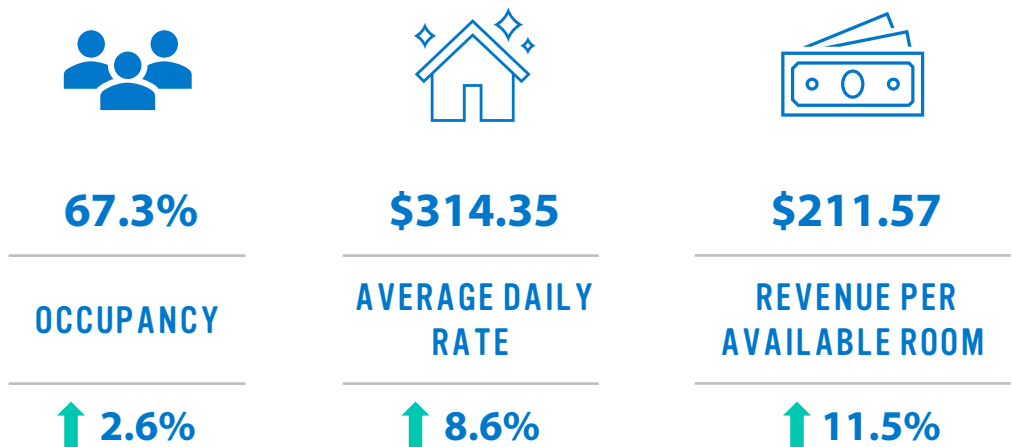
COMBINED



HOTELS¹



VACATION RENTALS²



¹ Source: Smith Travel Research.
² Source: Key Data.

vs. 2024

Note: Airbnb (effective April 30, 2025) and Vrbo (effective May 30, 2025) have updated how rates are quoted through their platforms. The ADR now includes cleaning fees, platform service fees, and applicable discounts (e.g., weekly or monthly stay discounts). Therefore, the **ADR of vacation rentals may appear inflated** in YOY comparisons now that Key Data is capturing the inclusive price (excluding taxes) rather than the base accommodation rate.

VISITOR JOURNEY: PRE-VISIT



- » Visitors to the Pensacola area have short trip planning windows, as **nearly half** of visitors planned their trip to the Pensacola area **a month or less in advance** (52% in 2024)
- » Average trip planning cycle began **64 days** before the trip (56 days in 2024)



TOP TRIP PLANNING SOURCES¹

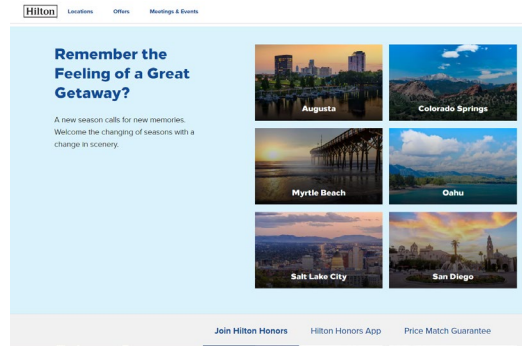
APRIL TO JUNE 2025



78% Search sites
(Google, etc.)
(76% in 2024)



43% Friends/family
(37% in 2024)



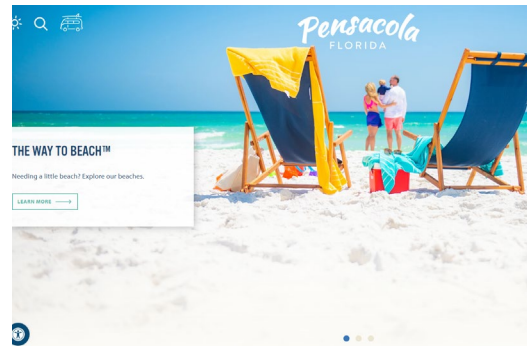
31% Hotel websites/apps
(27% in 2024)



27% Vacation rental
websites
(29% in 2024)



26% Airline websites/apps
(23% in 2024)

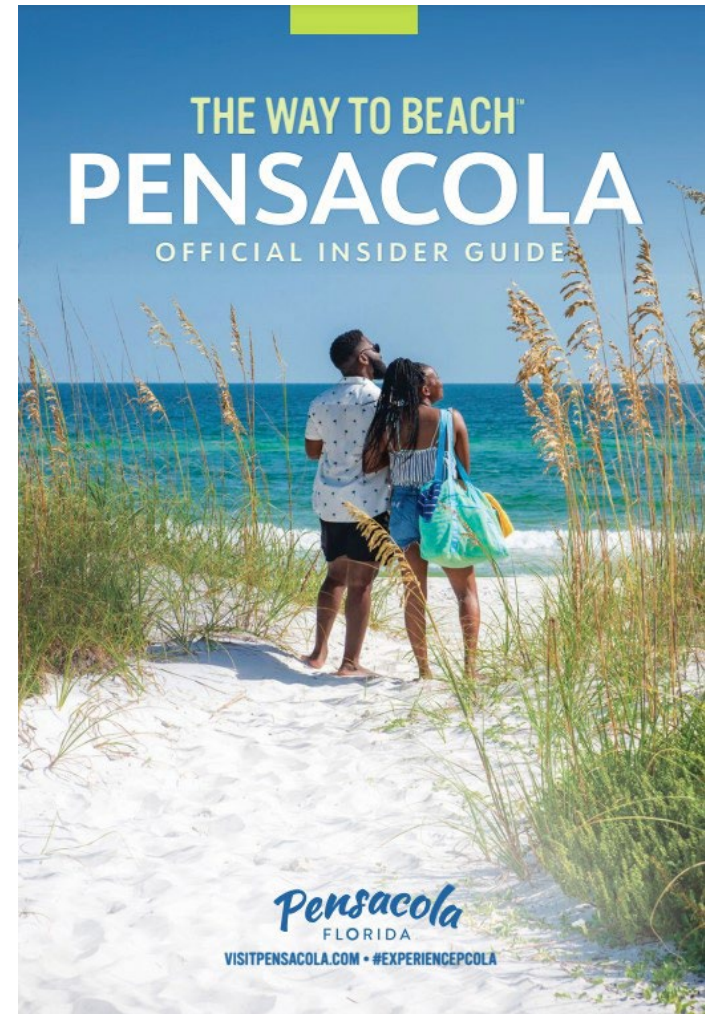


23% VisitPensacola.com
(17% in 2024)



20% Personal social media
(17% in 2024)

- » **26%** visitors requested or viewed the Pensacola Visitors Guide (**21% in 2024**)
- » Most visitors who used the Pensacola Visitor Guide viewed it **online**



TOP REASONS FOR VISITING¹

APRIL TO JUNE 2025



49% Beach
(49% in 2024)



35% Relax and unwind
(36% in 2024)



26% Visit friends/relatives
(26% in 2024)



20% Special occasion
(19% in 2024)



12% Special events
(8% in 2024)



11% Family time
(14% in 2024)

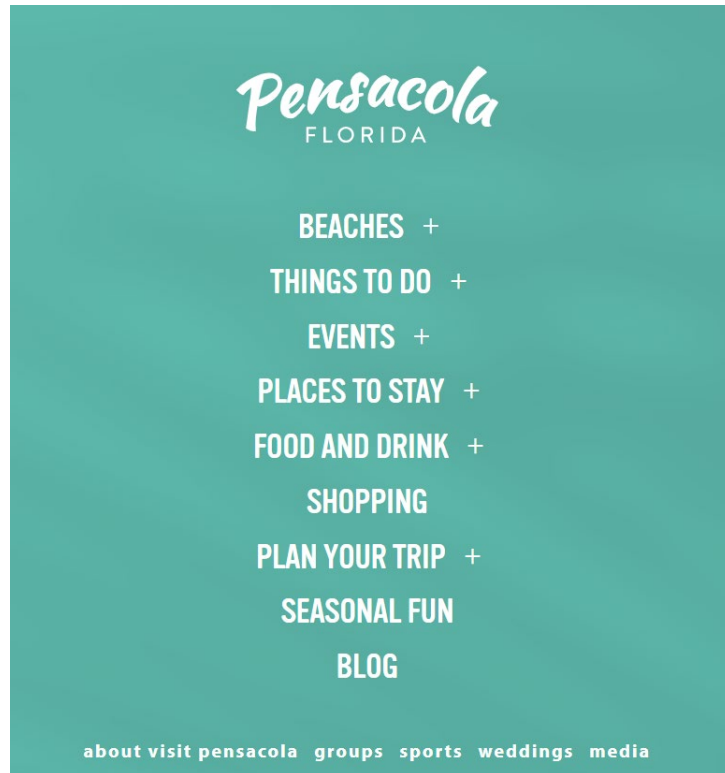
- » **37%** of visitors have recently noticed advertising about the Pensacola area (30% in 2024)
- » This information influenced **17%** of **all visitors** to visit the Pensacola area (12% in 2024)



SOURCES OF ADVERTISING RECALL¹

APRIL TO JUNE 2025

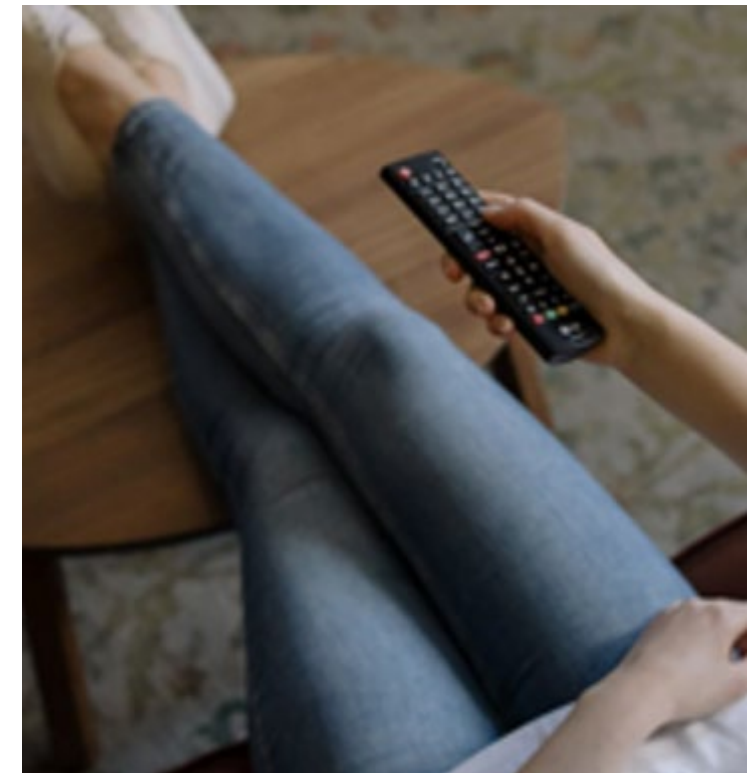
Base: **37%** of visitors who recalled advertising²



36% VisitPensacola.com
(21% in 2024)



31% Personal social media
(28% in 2024)



23% Television
(26% in 2024)

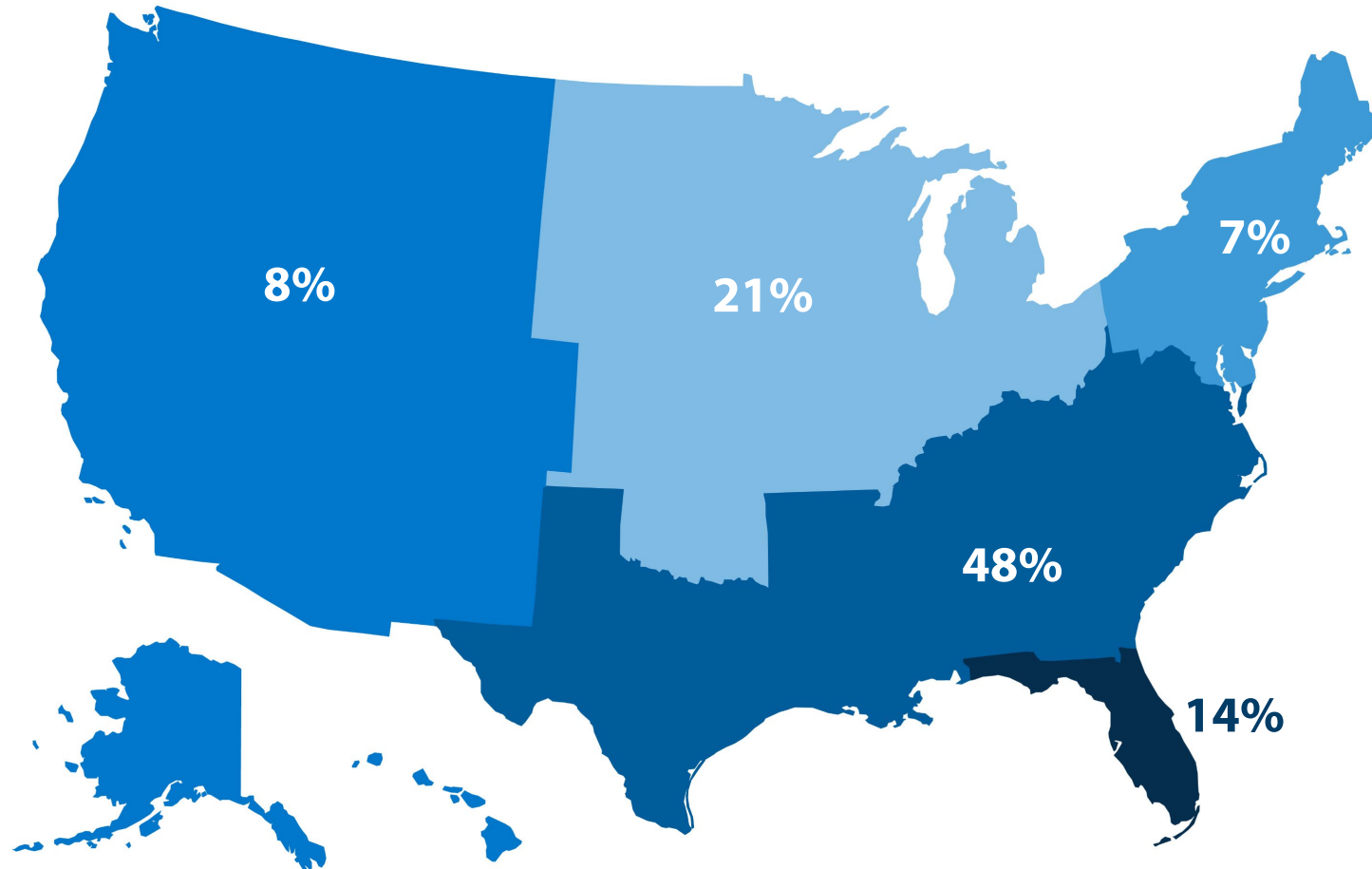
¹ Multiple responses permitted.

² Additional top sources of advertising recall: Weather app (17%), Rental agency/booking websites (16%), Traveler reviews/blogs (16%), and Visit Pensacola social media (15%).

VISITOR JOURNEY: TRAVEL PARTY PROFILE



The **southeast** including Florida account for **over 3 in 5** visitors

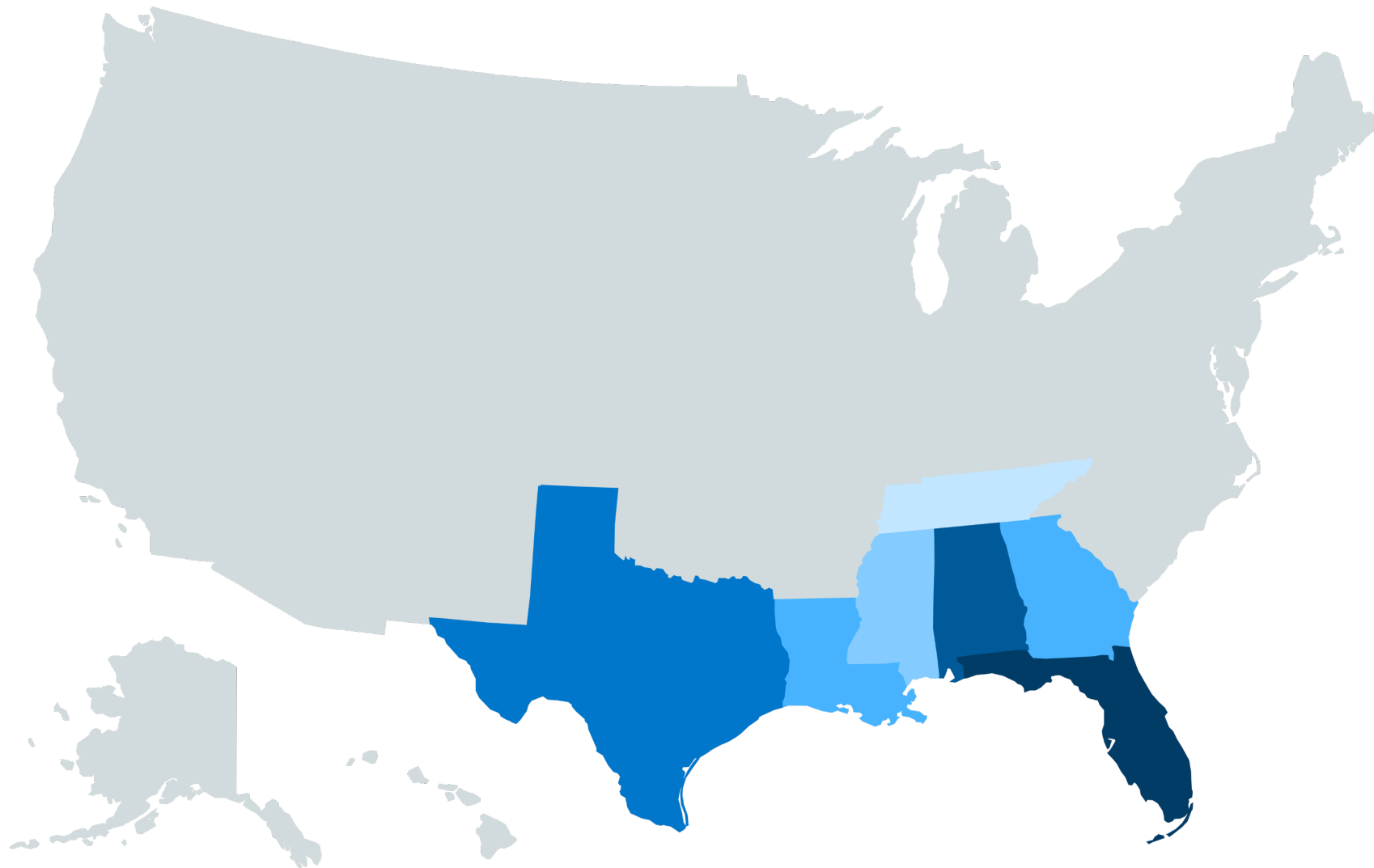


2% of visitors traveled to the Pensacola area from outside of the U.S.*

*Top international markets include Ontario, United Kingdom, Quebec, Germany, and France.

¹ Sources: Zartico and Visitor Tracking Study.

TOP STATES OF ORIGIN¹



Over 3 in 5 visitors
reside in **7 states**

14% Florida

13% Alabama

7% Texas

6% Georgia

6% Louisiana

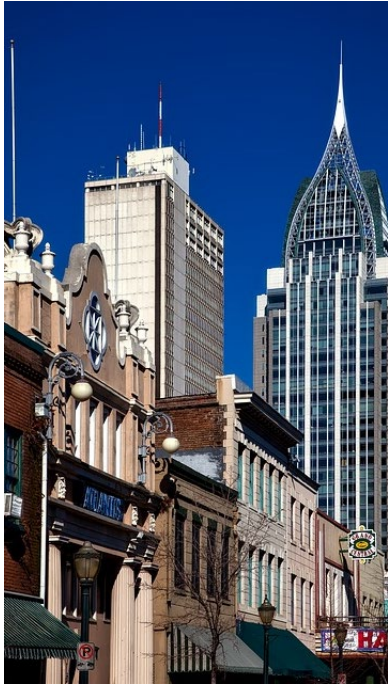
5% Mississippi

5% Tennessee

¹ Sources: Zartico and Visitor Tracking Study.

TOP MARKETS OF ORIGIN¹

APRIL TO JUNE 2025



14% Mobile²
(15% in 2024)



4% Atlanta
(4% in 2024)



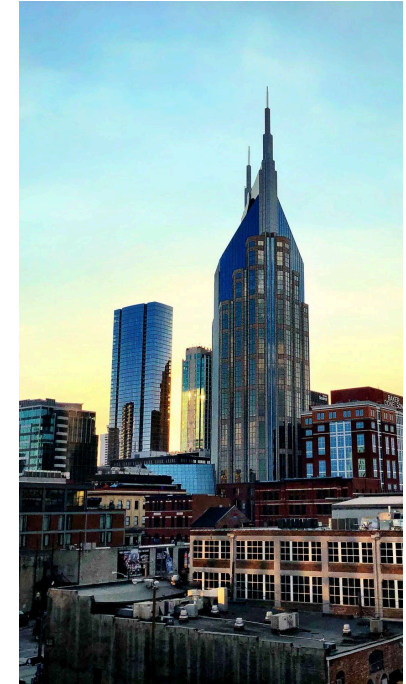
4% New Orleans
(2% in 2024)



3% Birmingham
(2% in 2024)



3% Dallas-Fort Worth
(3% in 2024)



3% Nashville
(2% in 2024)

¹ Sources: Zartico and Visitor Tracking Study.

² Mobile DMA spans across Florida, Alabama, and Mississippi.

- » The typical visitor traveled in a party composed of **2.9** people (3.1 in 2024)



- » **51%** traveled with at least one person under the age of 20 (47% in 2024)



- » The typical Pensacola area visitor:
 - » Is **44** years old (43 in 2024)
 - » Has a household income of **\$89,300** per year (\$83,300 in 2024)
 - » Female¹ **61%** (61% in 2024)



¹May be influenced by visitor's willingness to complete a survey.

- » **23%** of visitors said this was their **first time visiting** the Pensacola area (**29%** in 2024)
- » **32%** of visitors were loyal to Pensacola, having visited over 10 times (**25%** in 2024)



VISITOR JOURNEY: TRIP EXPERIENCE



- » **80%** of visitors **drove** to the Pensacola area for their trip (79% in 2024)
- » **19%** of **all** visitors flew to the Pensacola area through the **Pensacola International Airport** (20% in 2024)



- » Nearly **2 in 5** visitors stayed overnight in a **hotel, motel, or resort** (36% in 2024)
- » Typical visitors spent **3.9** nights in the Pensacola area (**4.0** in 2024)



TOP ACCOMMODATIONS

APRIL TO JUNE 2025



39% Hotel/Motel/Resort
(36% in 2024)



25% Vacation rental home*
(25% in 2024)



21% Day tripper
(21% in 2024)



10% Friends/family home
(11% in 2024)

*Includes Airbnb, Vrbo, etc.

TOP ACTIVITIES DURING VISIT¹

APRIL TO JUNE 2025



84% Restaurants
(87% in 2024)



77% Relax and unwind
(76% in 2024)



77% Beach
(80% in 2024)



51% Shopping
(39% in 2024)



39% Attractions
(35% in 2024)



37% Art galleries,
museums, etc.
(37% in 2024)



35% Bars/nightclubs
(28% in 2024)



35% Visit friends/
relatives
(33% in 2024)



31% Family time
(33% in 2024)



25% Water sports
(24% in 2024)



23% Special events
(14% in 2024)

¹ Multiple responses permitted.

- » Travel parties spent **\$394** per day and **\$1,537** during their trip (\$388 per day and \$1,552 per trip in 2024)



VISITOR JOURNEY: POST-TRIP



- » **99%** of visitors were **satisfied** with their trip to the Pensacola area (99% in 2024) – **79%** were **very satisfied** (77% in 2024)
- » **96%** of visitors would **recommend** the area to others (93% in 2024)
- » **99%** of visitors would **return** to the Pensacola area (98% in 2024) – **72%** would **definitely return** (70% in 2024)



- » **Over 3 in 5** visitors expressed that **restaurants** (65% in 2024), **customer service** (66% in 2024), and **lodging** (62% in 2024) exceeded expectations
- » **Half** of visitors expressed **value for their money** (51% in 2024) exceeded expectations





"Would love to visit more often. There's so much to see and do. We are only here for four days and it's not nearly enough. Fried food heaven, really good food in town and at the beach."



"We want to move here. Pensacola has the best beaches and everyone is so friendly!"

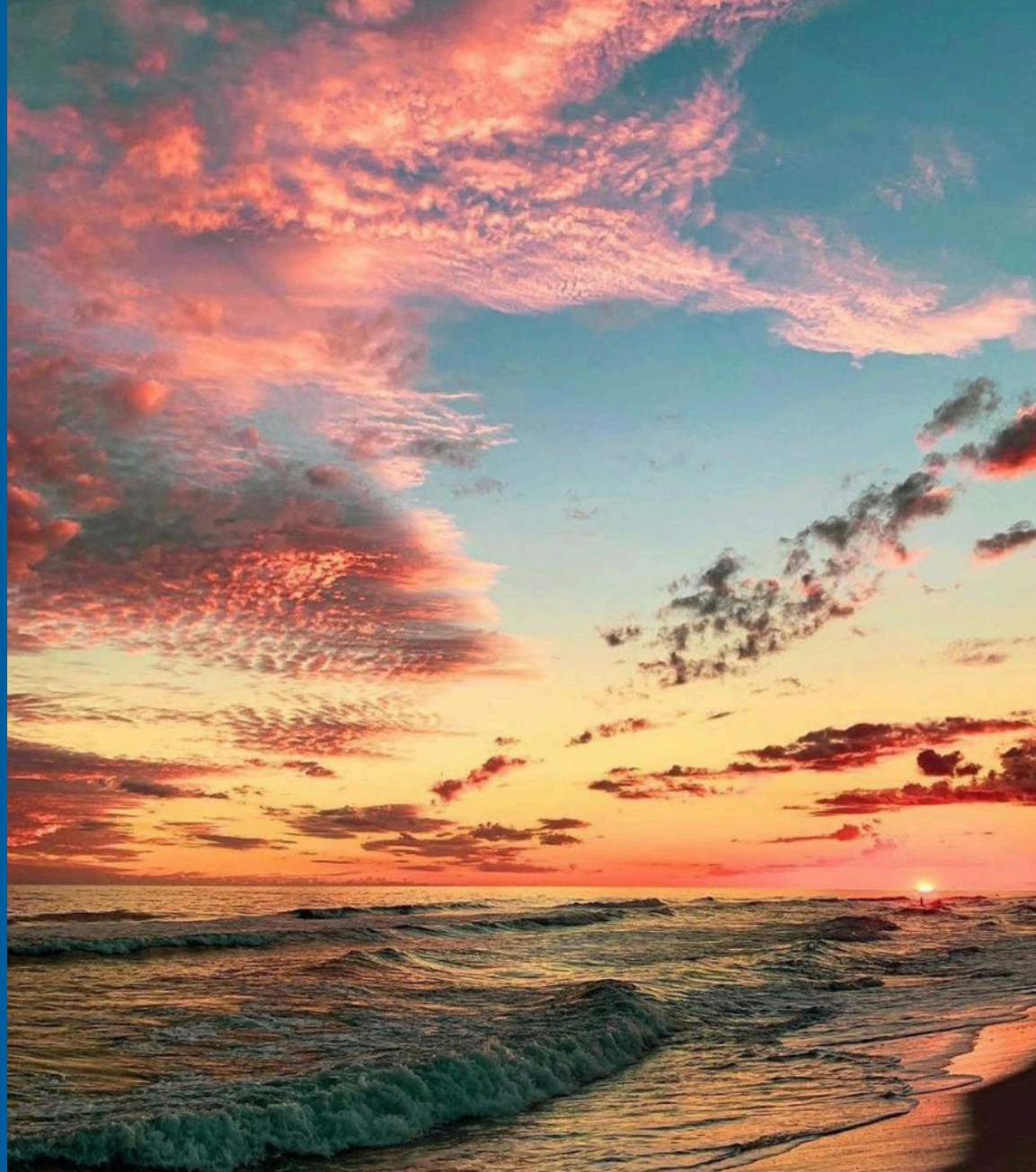


"Great for the whole family and everything you might need is close by. Beautiful, accessible, accommodating, friendly, and feels safe."



*Open-ended responses. Multiple responses permitted.

DETAILED FINDINGS



VISITOR JOURNEY: ECONOMIC IMPACT



	April - June 2024	April - June 2025	% Δ
Visitors ¹	797,200	764,700	-4.1%
Direct Spending	\$383,126,400	\$391,868,300	+2.3%
Room Nights	711,500	728,700	+2.4%
TDT ²	\$5,915,677	\$6,088,953	+2.9%

¹ Smaller travel party sizes and fewer visitors staying with friends/relatives or in their second homes contributed to a decrease in overall visitation.

² Source: Clerk & Comptroller Escambia County.

Combined Lodging Metrics	April – June 2024	April – June 2025	% Δ
Occupancy	70.1%	70.6%	+0.7%
ADR	\$192.86	\$195.93	+1.6%
RevPAR	\$135.17	\$138.34	+2.3%

Hotel Metrics ¹	April – June 2024	April – June 2025	% Δ
Occupancy	71.5%	71.5%	0.0%
ADR	\$161.91	\$163.34	+0.9%
RevPAR	\$115.82	\$116.82	+0.9%

Vacation Rental Metrics ²	April – June 2024	April – June 2025	% Δ
Occupancy	65.6%	67.3%	+2.6%
ADR	\$289.42	\$314.35	+8.6%
RevPAR	\$189.77	\$211.57	+11.5%

Note: Airbnb (effective April 30, 2025) and Vrbo (effective May 30, 2025) have updated how rates are quoted through their platforms. The ADR now includes cleaning fees, platform service fees, and applicable discounts (e.g., weekly or monthly stay discounts). Therefore, the **ADR of vacation rentals may appear inflated** in YOY comparisons now that Key Data is capturing the inclusive price (excluding taxes) rather than the base accommodation rate.

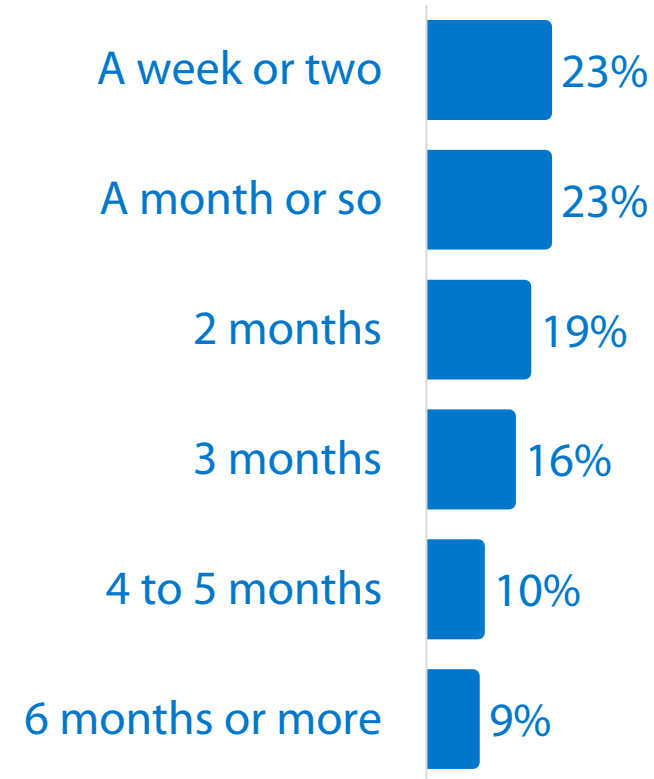
¹ Source: Smith Travel Research.

² Source: Key Data.

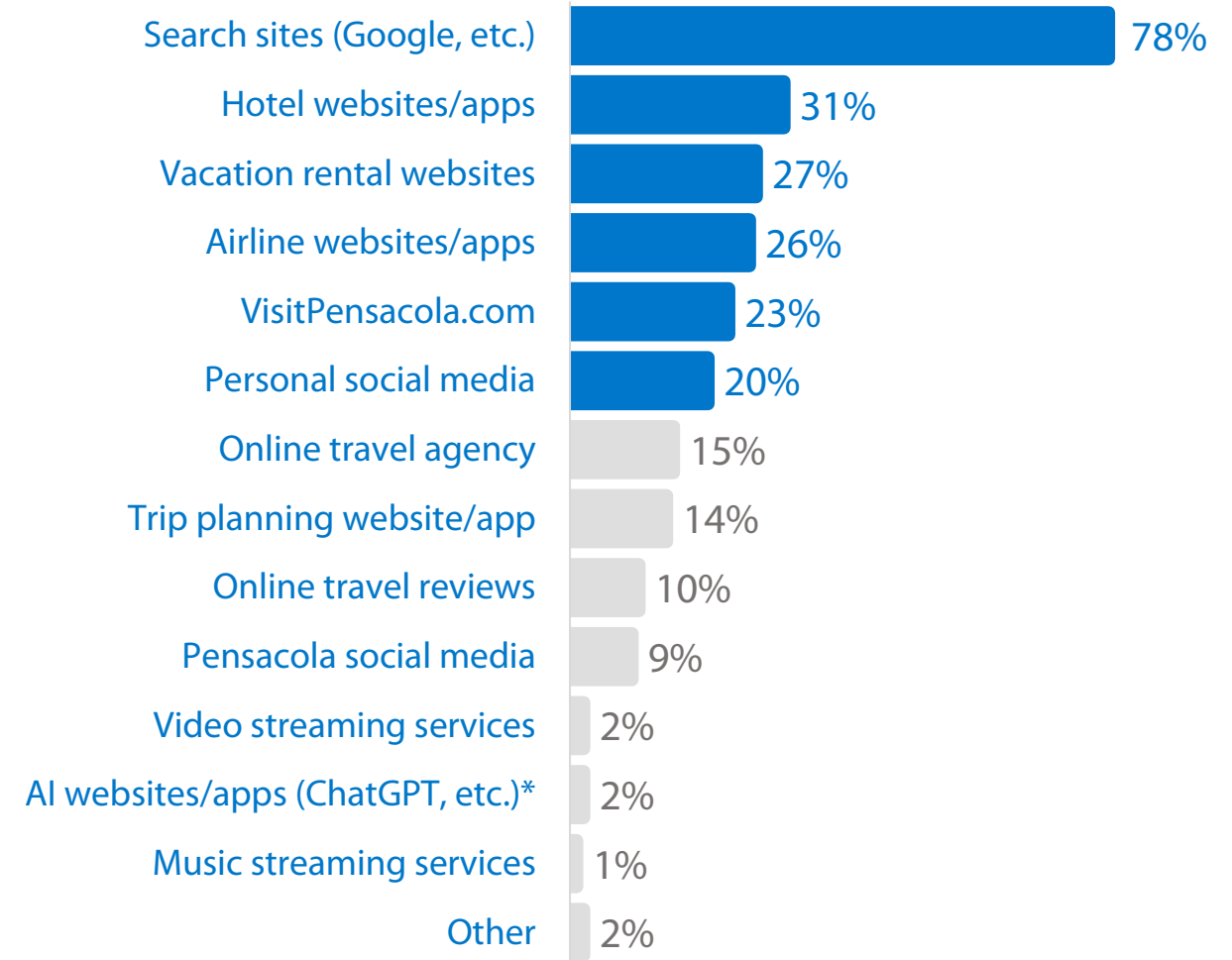
VISITOR JOURNEY: PRE-VISIT



- » Visitors to the Pensacola area have short trip planning windows, as **nearly half** of visitors planned their trip to the Pensacola area **a month or less in advance** (52% in 2024)
- » On the other hand, **over 1 in 3** visitors planned their trip between **2 and 3 months in advance** (35% in 2024)
- » Average trip planning cycle began **64 days** before the trip (56 days in 2024)



- » **Search sites, such as Google,** continue to be the **number one planning source** for trips to the Pensacola area
- » **Over 3 in 10** visitors used **hotel websites/apps** and **over 1 in 4** visitors used **vacation rental websites** and **airline websites/apps** to plan their trip – all proving to be **good advertising mediums** for the Pensacola area
- » **Over 1 in 5** visitors used **VisitPensacola.com** to plan their trip, **+6% points** from 2024
- » **1 in 5** visitors planned their trip with their **personal social media**



¹ Multiple responses permitted.

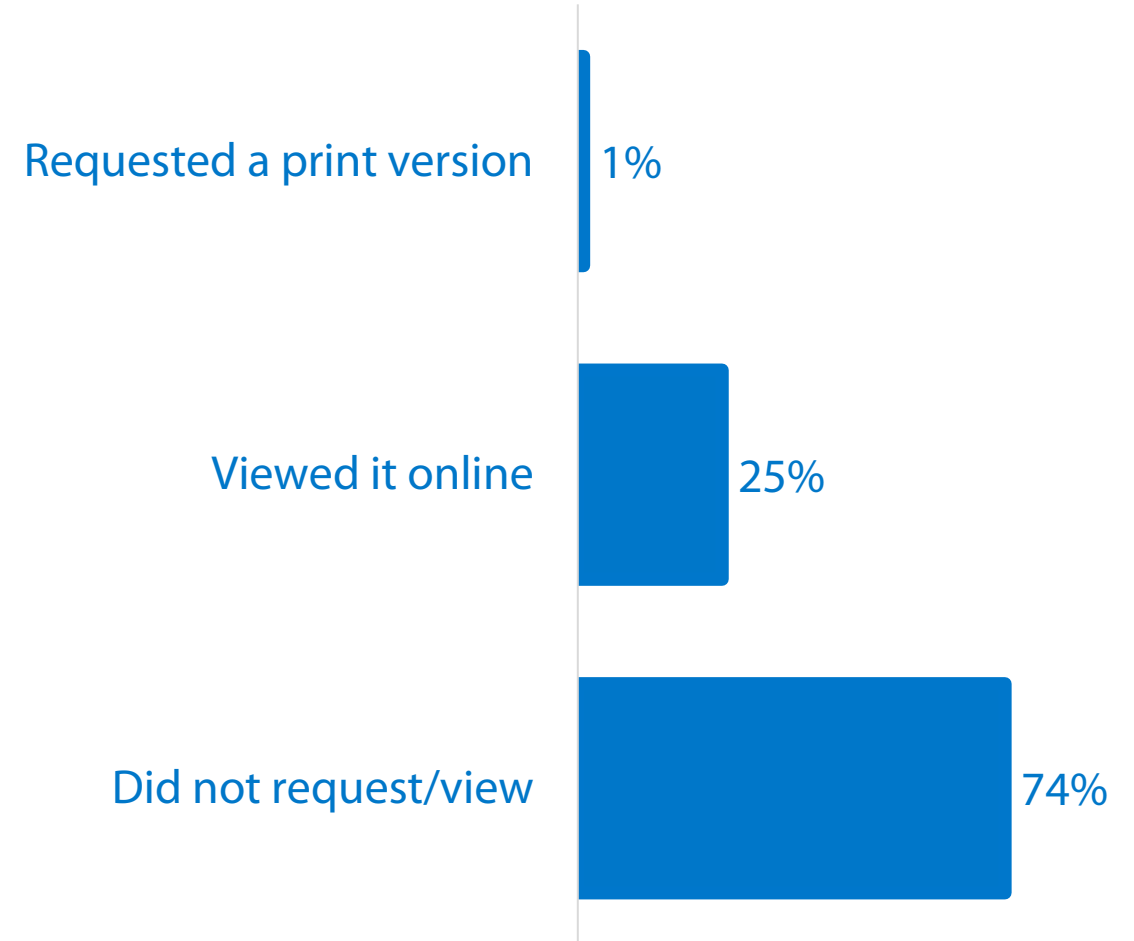
*Added as an answer choice this quarter.

- » **Over 2 in 5** visitors planned their trip to the Pensacola area through **friends/family**
- » **Nearly 1 in 10** visitors used **brochures, travel guides, and/or visitor guides**

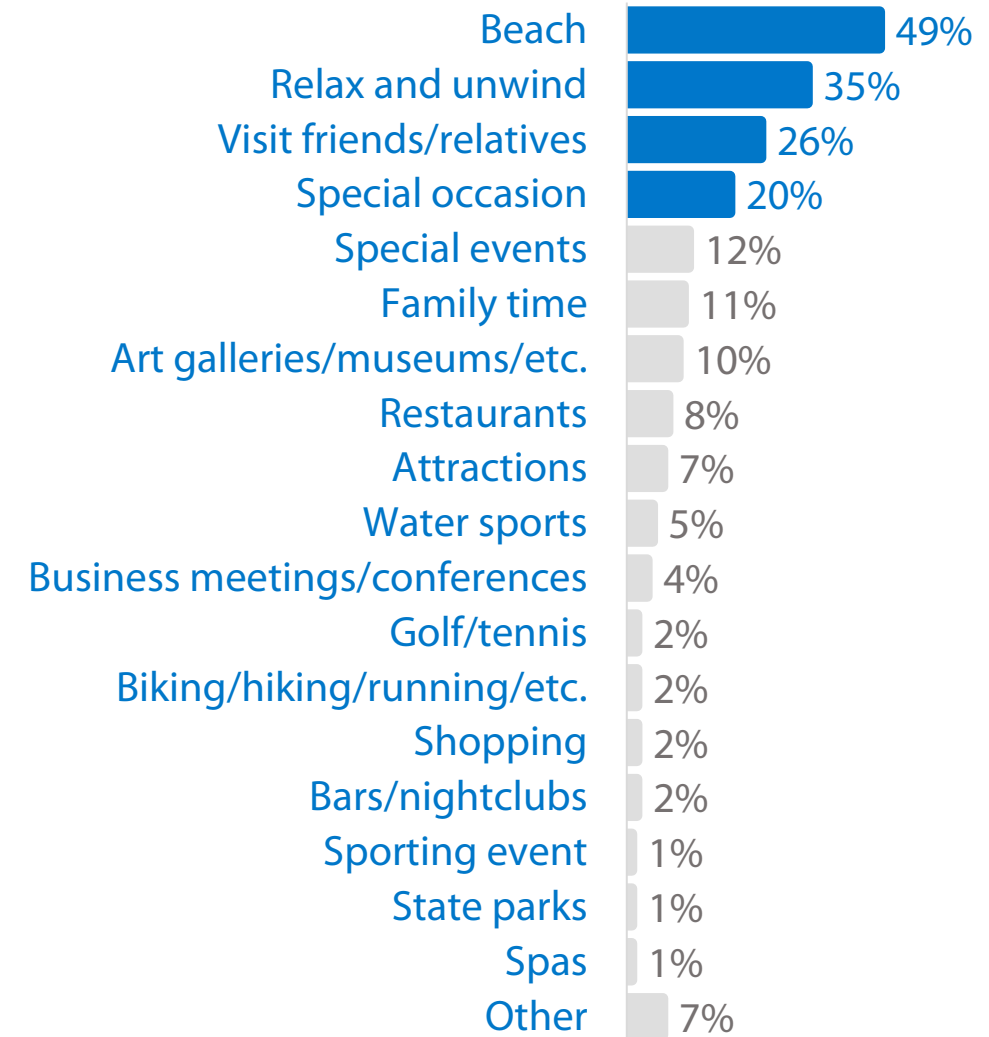


¹ Multiple responses permitted.

- » **Over 1 in 4** visitors requested or viewed the Pensacola Visitors Guide (21% in 2024)
- » **Online** viewership of the Pensacola Visitor Guide was significantly greater than print consumption

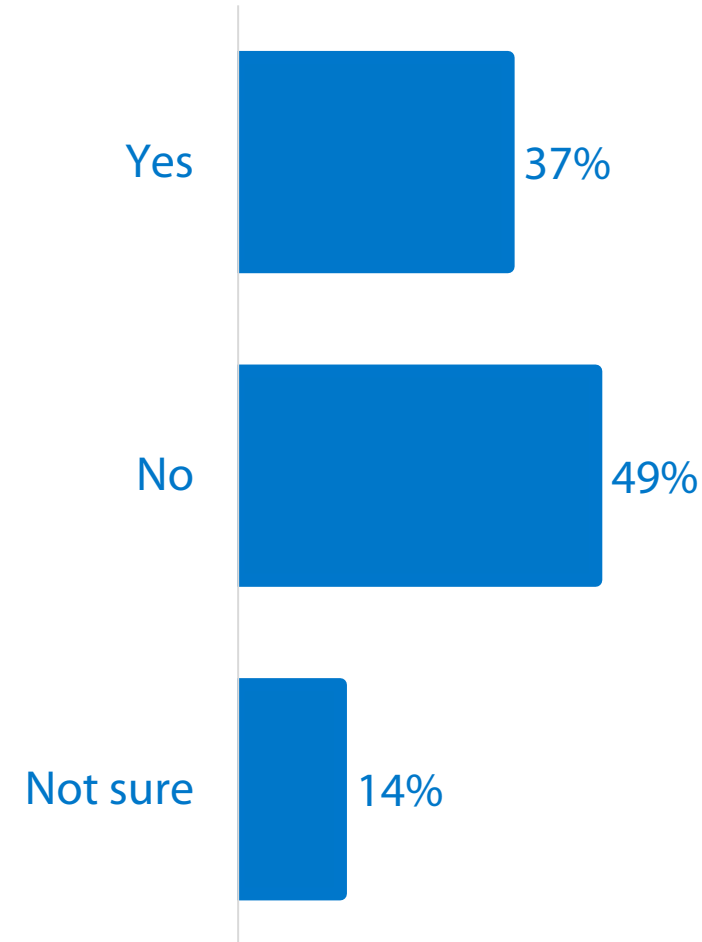


- » **Nearly half** of visitors came to the Pensacola area to visit the **beach**
- » **Over 1 in 3** visitors came to **relax and unwind**
- » **Over 1 in 4** visitors came to **visit friends and relatives**
- » **1 in 5** visitors came for a **special occasion**



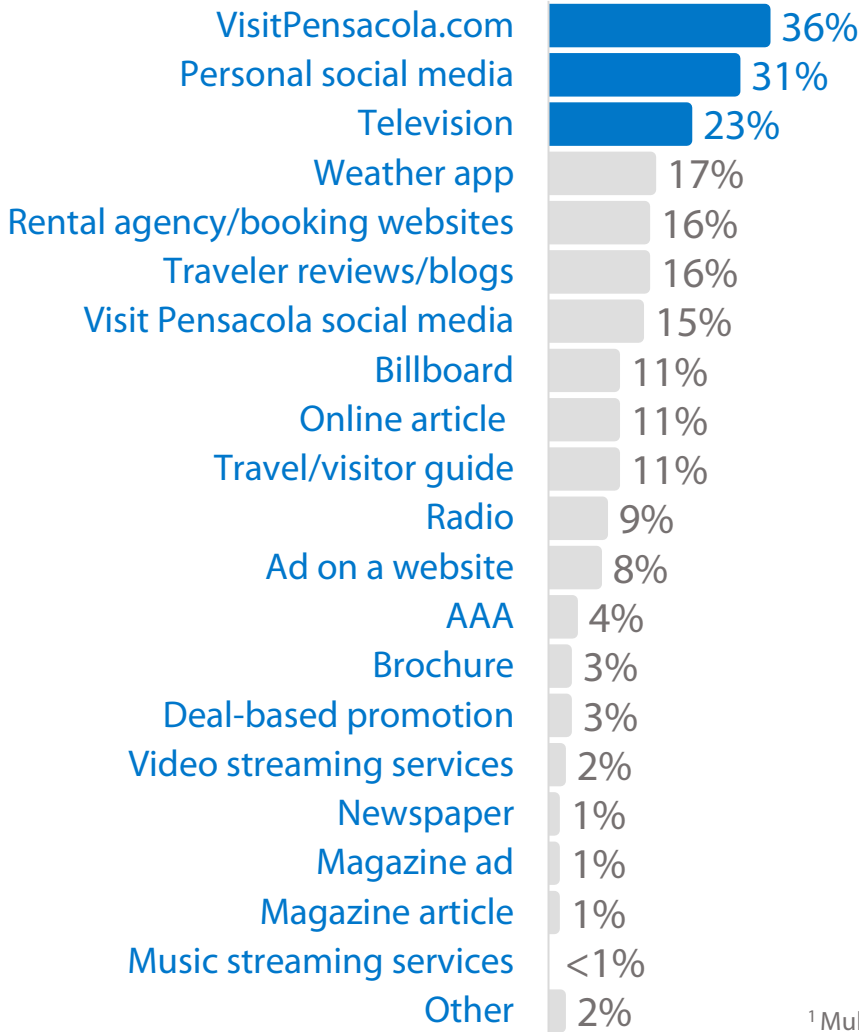
¹ Up to three responses permitted

- » **Nearly 2 in 5** visitors **recalled advertising** about the Pensacola area (30% in 2024)
- » This information influenced **17%** of **all visitors** to visit the Pensacola area (12% in 2024)



- » **Over 1 in 3** visitors who recalled advertising for the Pensacola area noticed it on **VisitPensacola.com**
- » **Over 3 in 10** visitors noticed advertising on **personal social media**
- » **Nearly 1 in 4** visitors noticed advertising on a **television**

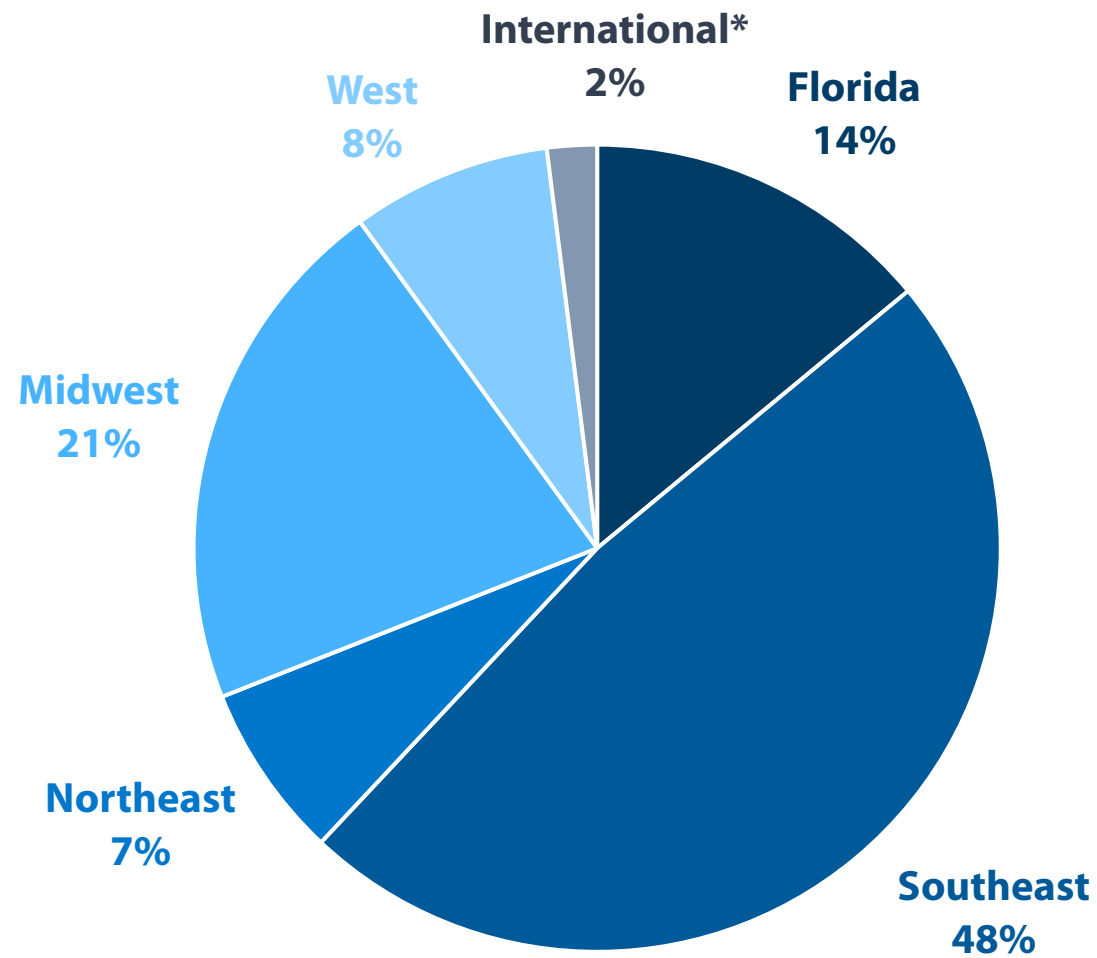
Base: **37%** of visitors who recalled advertising



¹ Multiple responses permitted.

VISITOR JOURNEY: TRAVEL PARTY PROFILE





¹ Sources: Zartico and Visitor Tracking Study.

*Top international markets include Ontario, United Kingdom, Quebec, Germany, and France.

State of Origin	2024	2025 ¹
Florida	16%	14%
Alabama	11%	13%
Texas	8%	7%
Georgia	6%	6%
Louisiana	5%	6%
Mississippi	3%	5%
Tennessee	5%	5%
Kentucky	3%	3%
Missouri	3%	3%



¹ Sources: Zartico and Visitor Tracking Study.

Markets	2024	2025 ¹
Mobile ²	15%	14%
Atlanta	4%	4%
New Orleans	2%	4%
Birmingham	2%	3%
Dallas – Fort Worth	3%	3%
Nashville	2%	3%

¹ Sources: Zartico and Visitor Tracking Study.

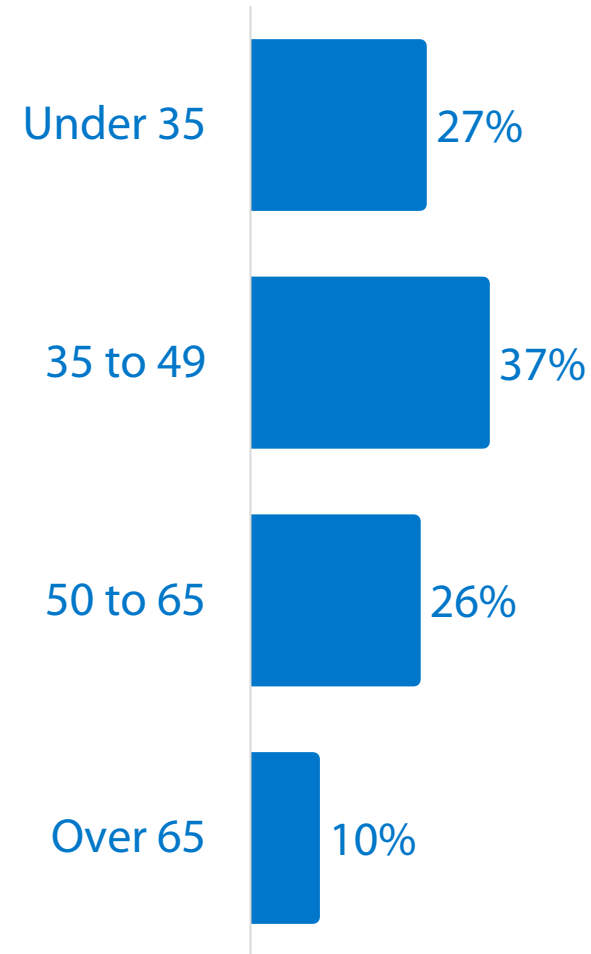
² Mobile DMA spans across Florida, Alabama, and Mississippi.

- » For all visitors, the typical travel party size was **2.9** (3.1 in 2024)
- » **Over half** of travel parties included **children under the age of 20** (47% in 2024)

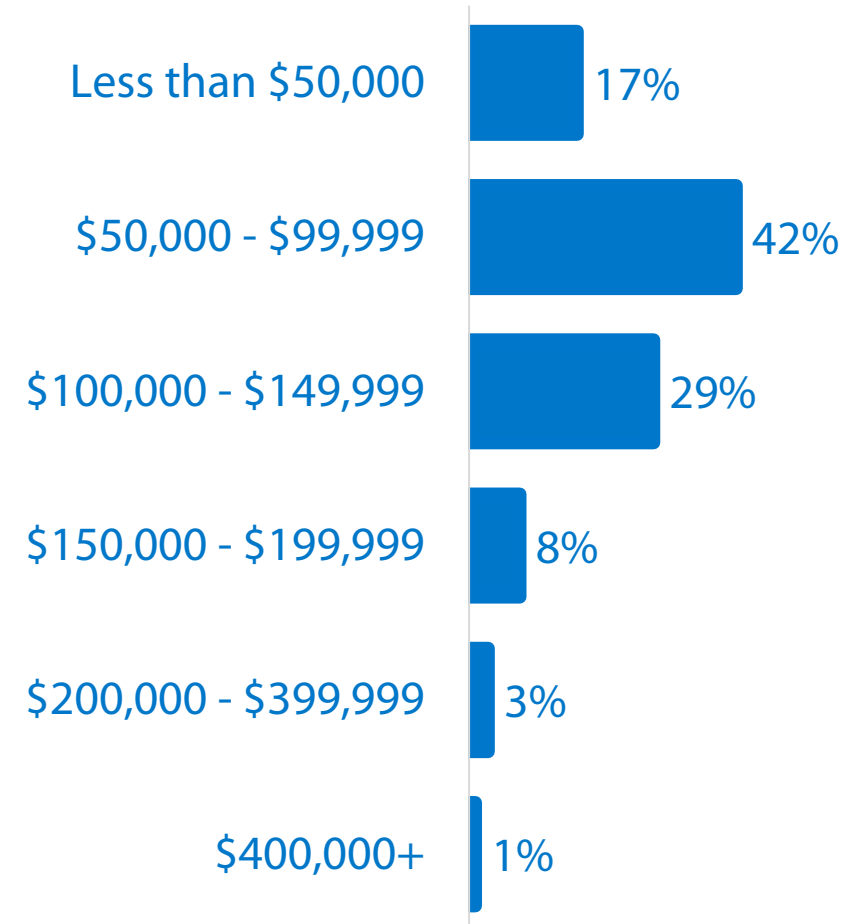


*Children are considered people under the age of 20

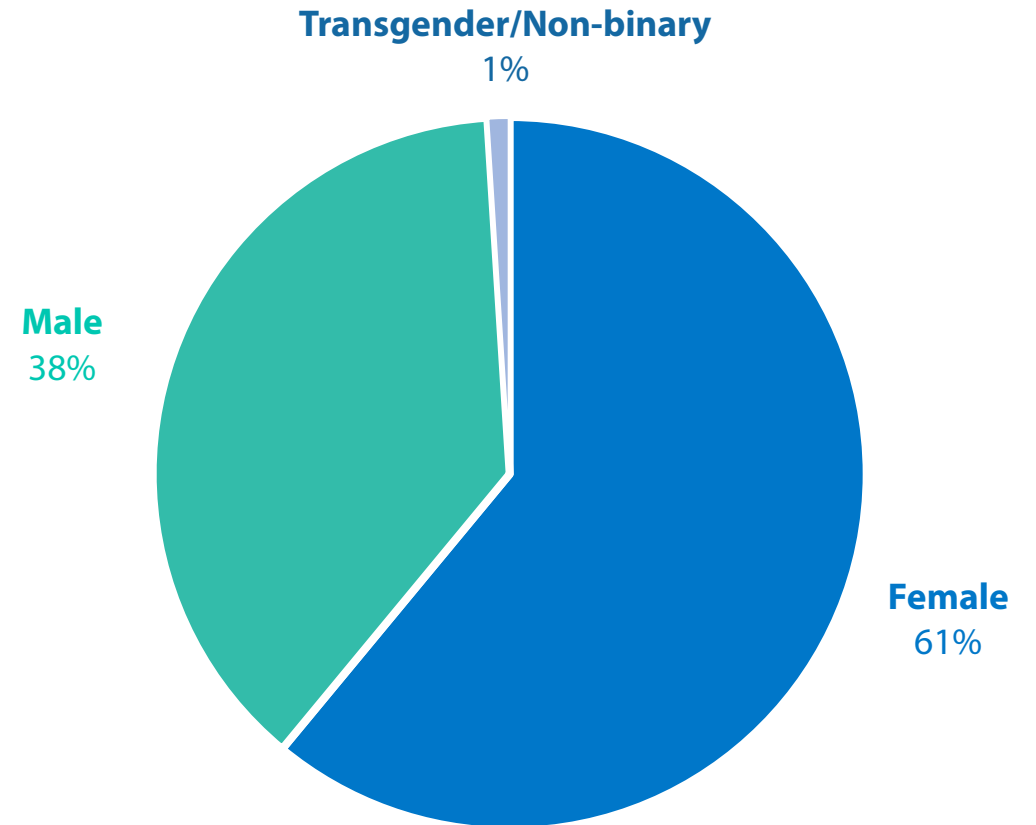
» The median age of visitors to the Pensacola area was **44** (43 in 2024)



- » Visitors to the Pensacola area had a median household income of **\$89,300** per year (\$83,300 in 2024)
- » **12%** of visitors had household incomes **over \$150,000**

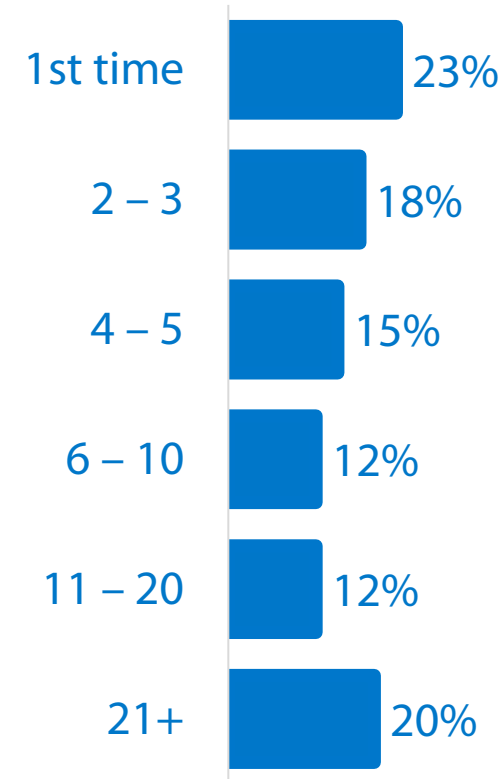


» **61%** of visitors interviewed were **female**¹
(61% in 2024)



¹May be influenced by visitor's willingness to complete a survey.

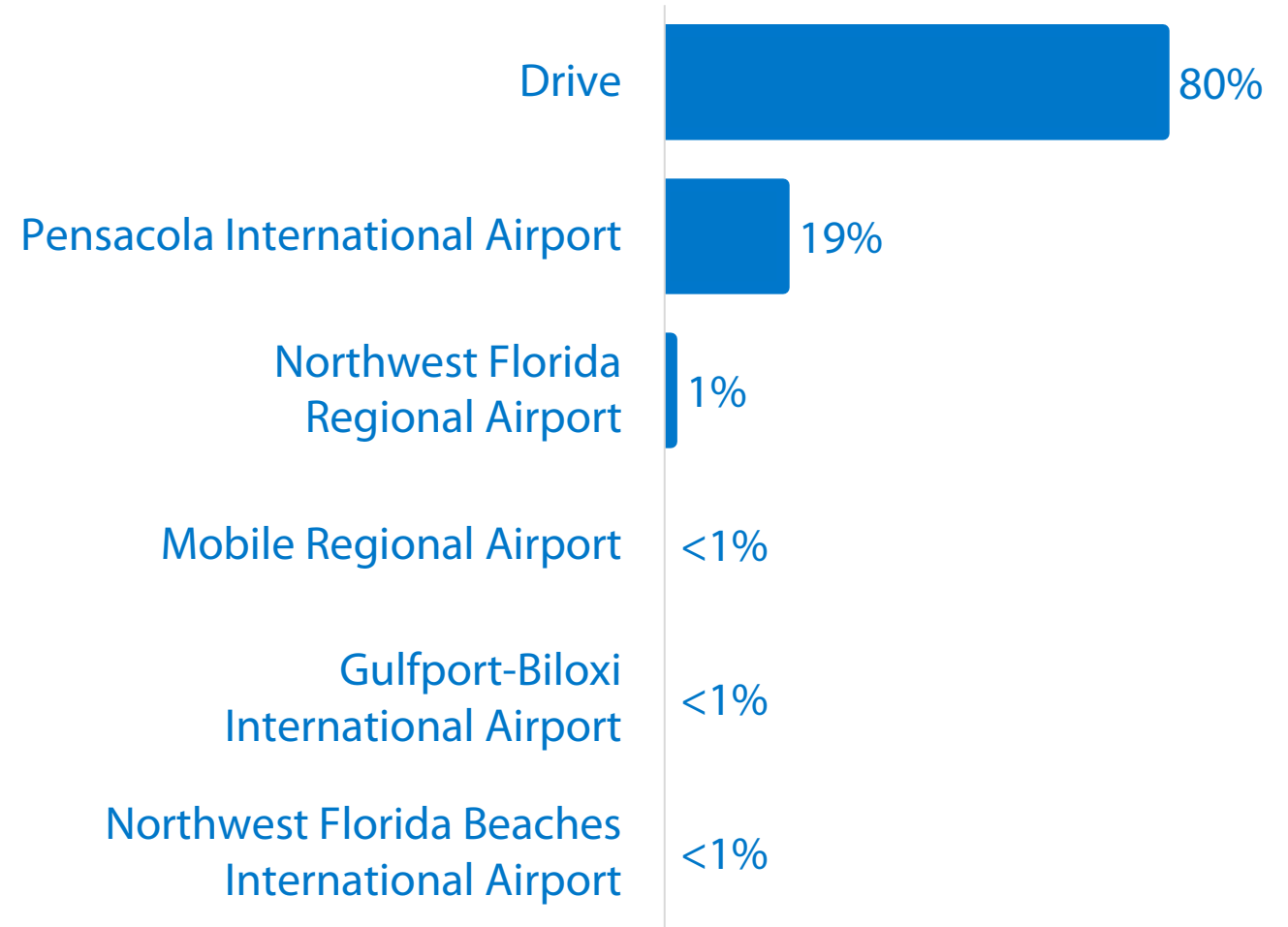
- » **Nearly 1 in 4** visitors said this was their **first time visiting** the Pensacola area (29% in 2024)
- » **Nearly 1 in 3** visitors are loyalists, having **visited the Pensacola area over 10 times** (25% in 2024)



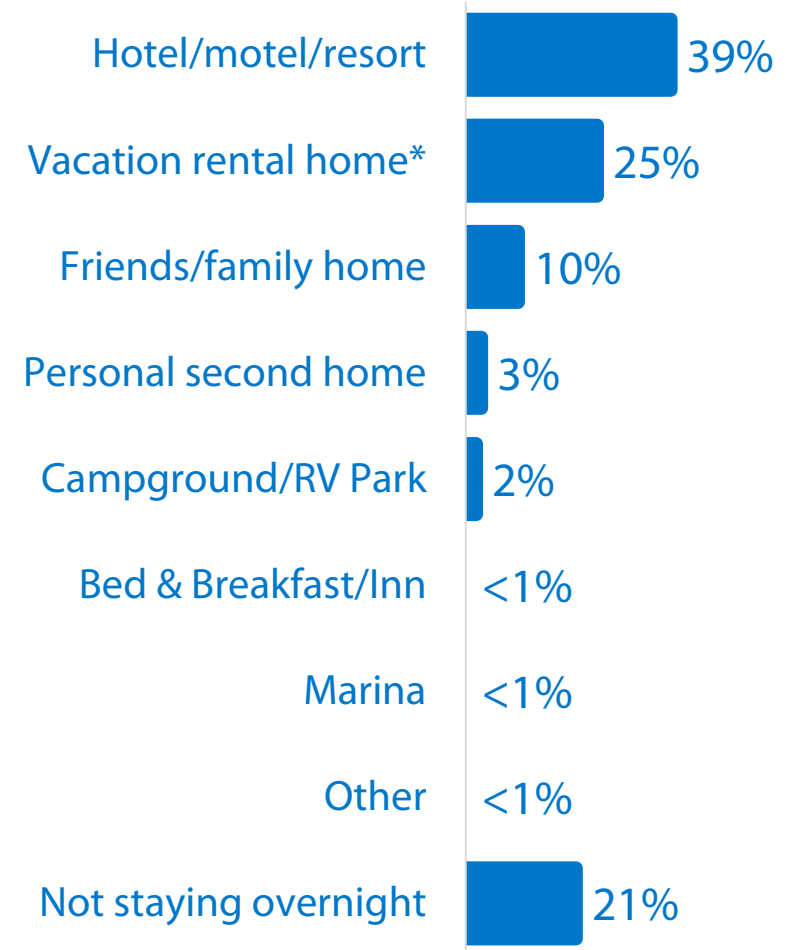
VISITOR JOURNEY: TRIP EXPERIENCE



- » **4 in 5** visitors **drove** to Pensacola area for their trip (79% in 2024)
- » **19%** of **all** visitors used the **Pensacola International Airport** (20% in 2024)

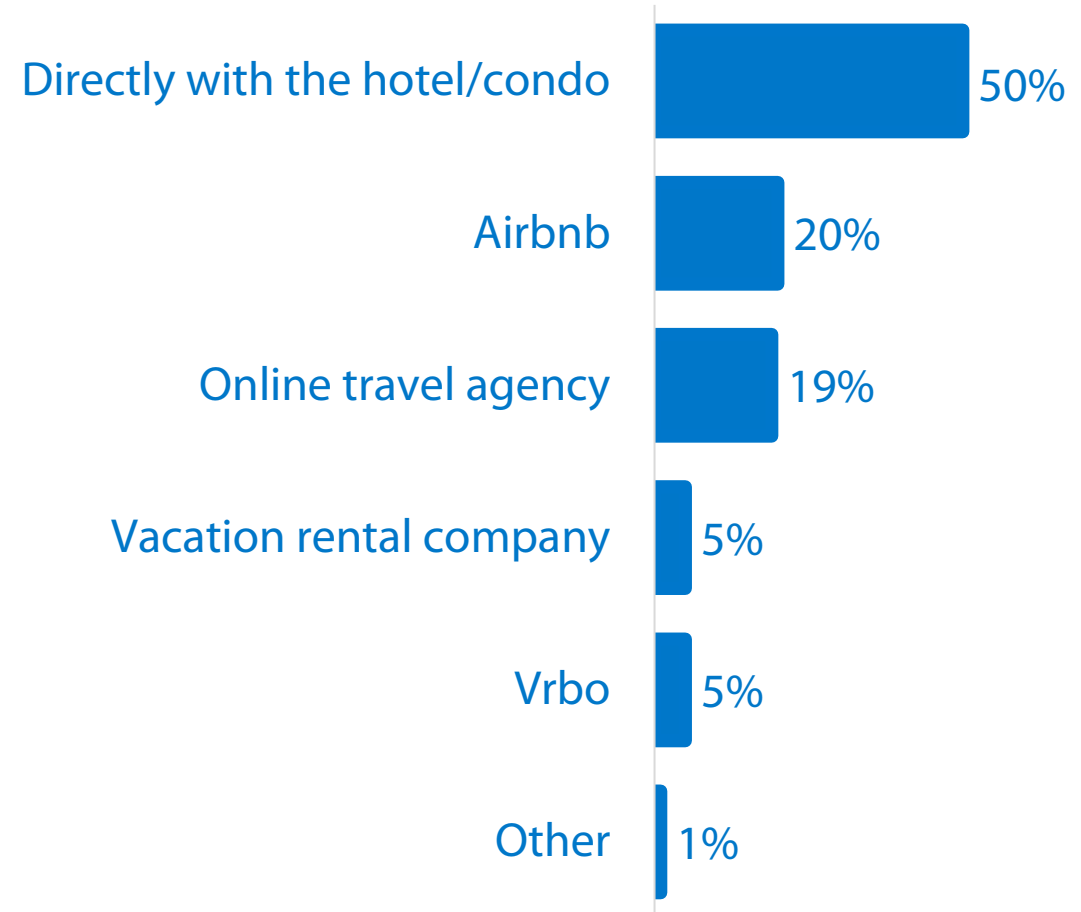


- » **Nearly 2 in 5** visitors stayed overnight in a **hotel, motel, or resort** (36% in 2024)
- » Typical visitors stayed **3.9** nights in Pensacola area (4.0 in 2024)
- » Typical visitors staying in paid accommodations stayed **4.5** nights in the Pensacola area (4.6 in 2024)



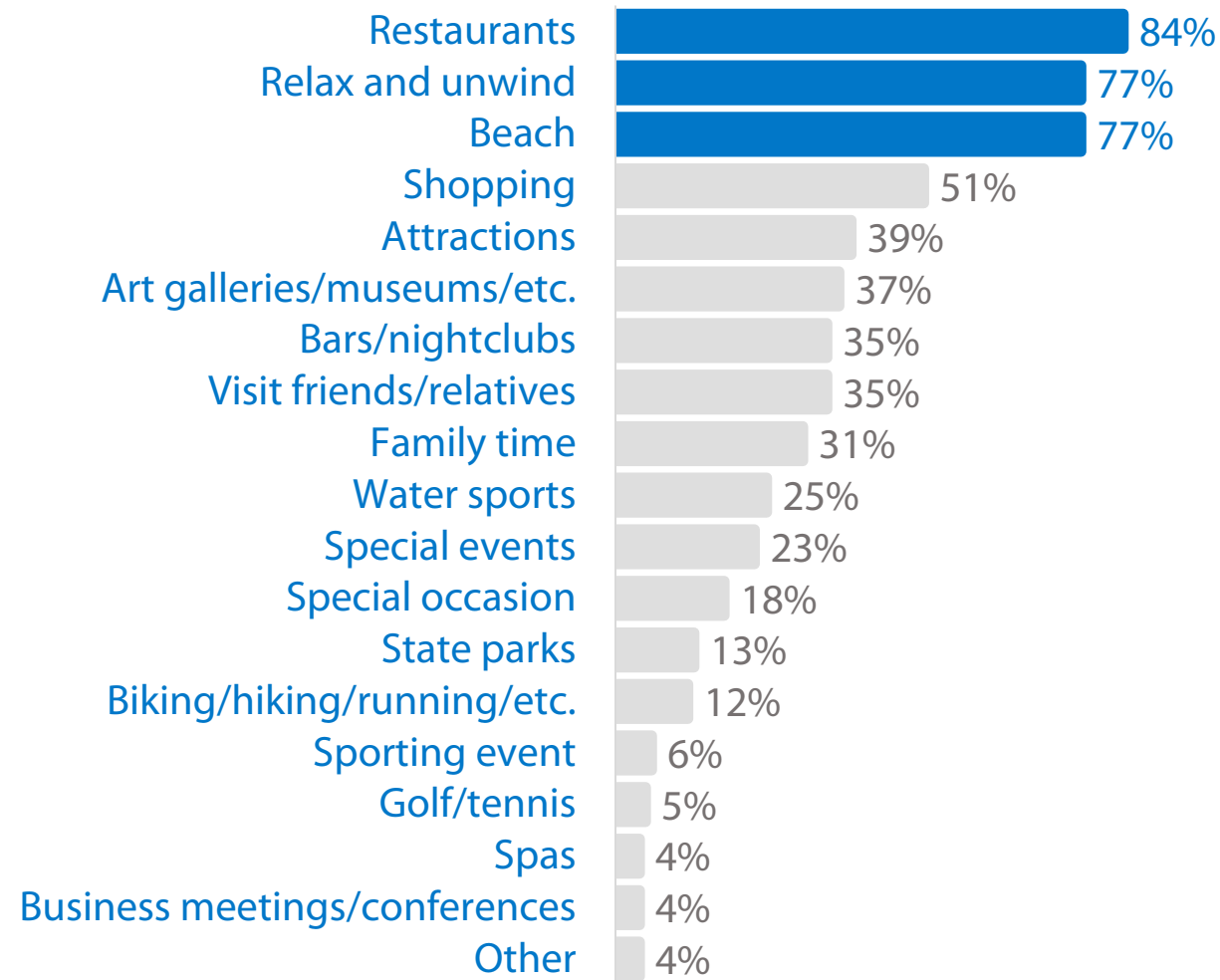
*Includes Airbnb, Vrbo, etc.

- » **Half** of visitors booked their trip to the Pensacola area **directly with the hotel/condo** (46% in 2024)
- » **Around 1 in 5** visitors booked through **Airbnb** (21% in 2024) or an **online travel agency** (19% in 2024)



» Top activities enjoyed by visitors this quarter include:

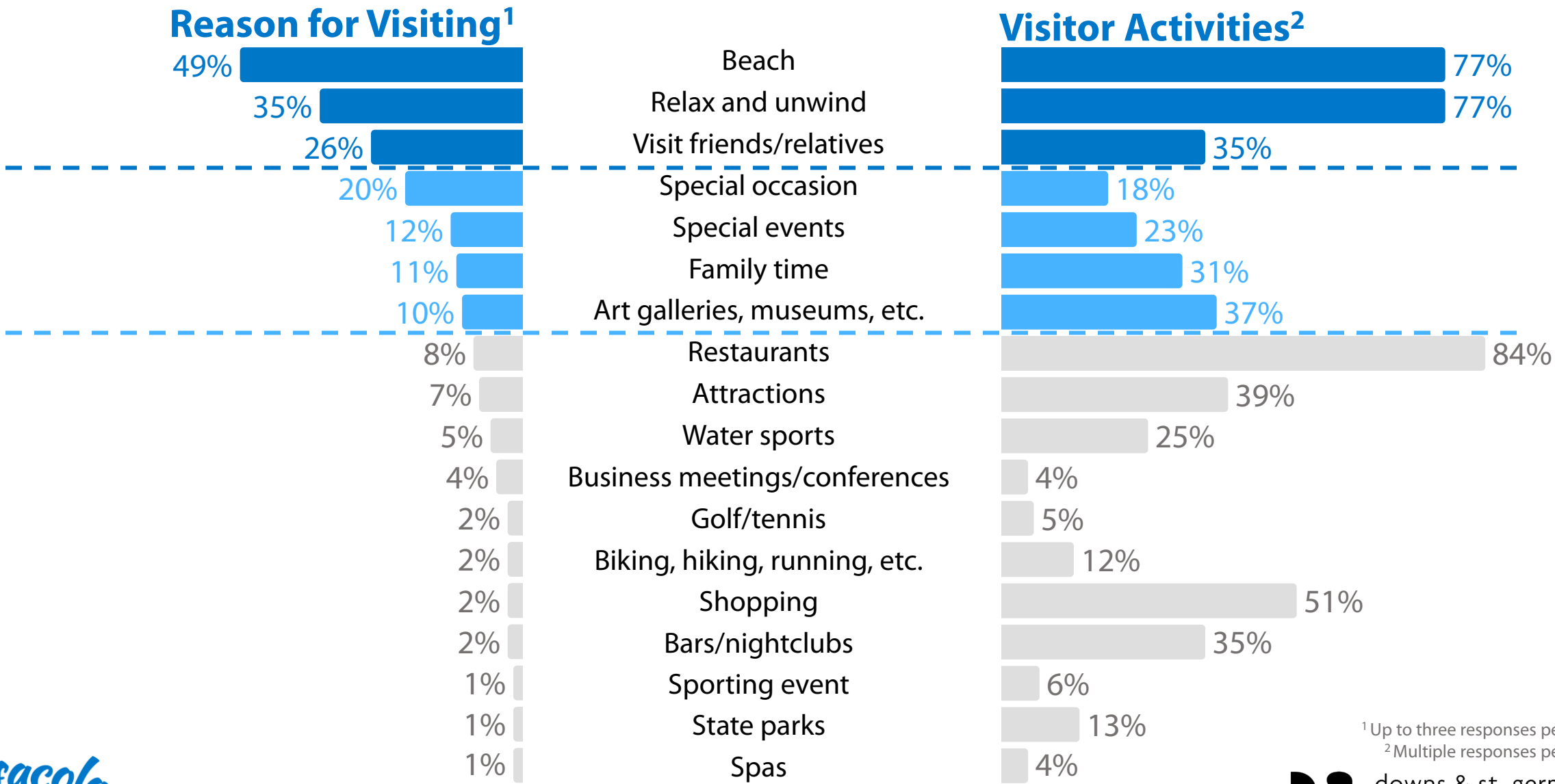
- » **Eating at restaurants**
- » **Relaxing**
- » **Visiting the beach**



¹ Multiple responses permitted.

ACTIVITIES V. REASON FOR VISIT

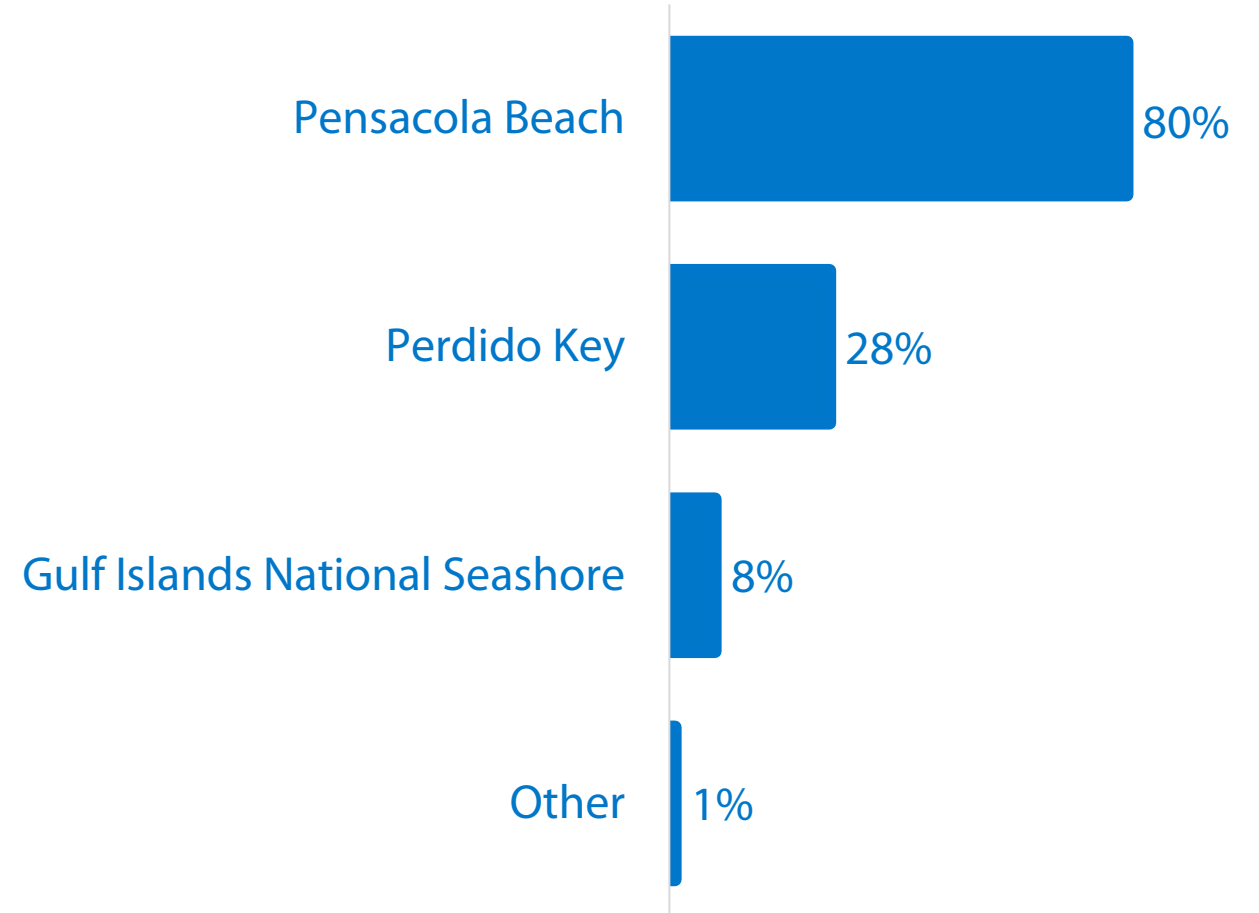
APRIL TO JUNE 2025



¹ Up to three responses permitted.
² Multiple responses permitted.

» **4 in 5** visitors who visited the beach went to Pensacola Beach

» **Nearly 3 in 10** visited Perdido Key



¹ Multiple responses permitted.

DAILY TRAVEL PARTY SPENDING

APRIL TO JUNE 2025

	All Visitors 2024	All Visitors 2025
Accommodations	\$150	\$152
Restaurants	\$97	\$109
Groceries	\$23	\$20
Shopping	\$40	\$36
Entertainment	\$48	\$51
Transportation	\$27	\$24
Other	\$3	\$2
Daily Spending	\$388	\$394

TOTAL TRAVEL PARTY SPENDING

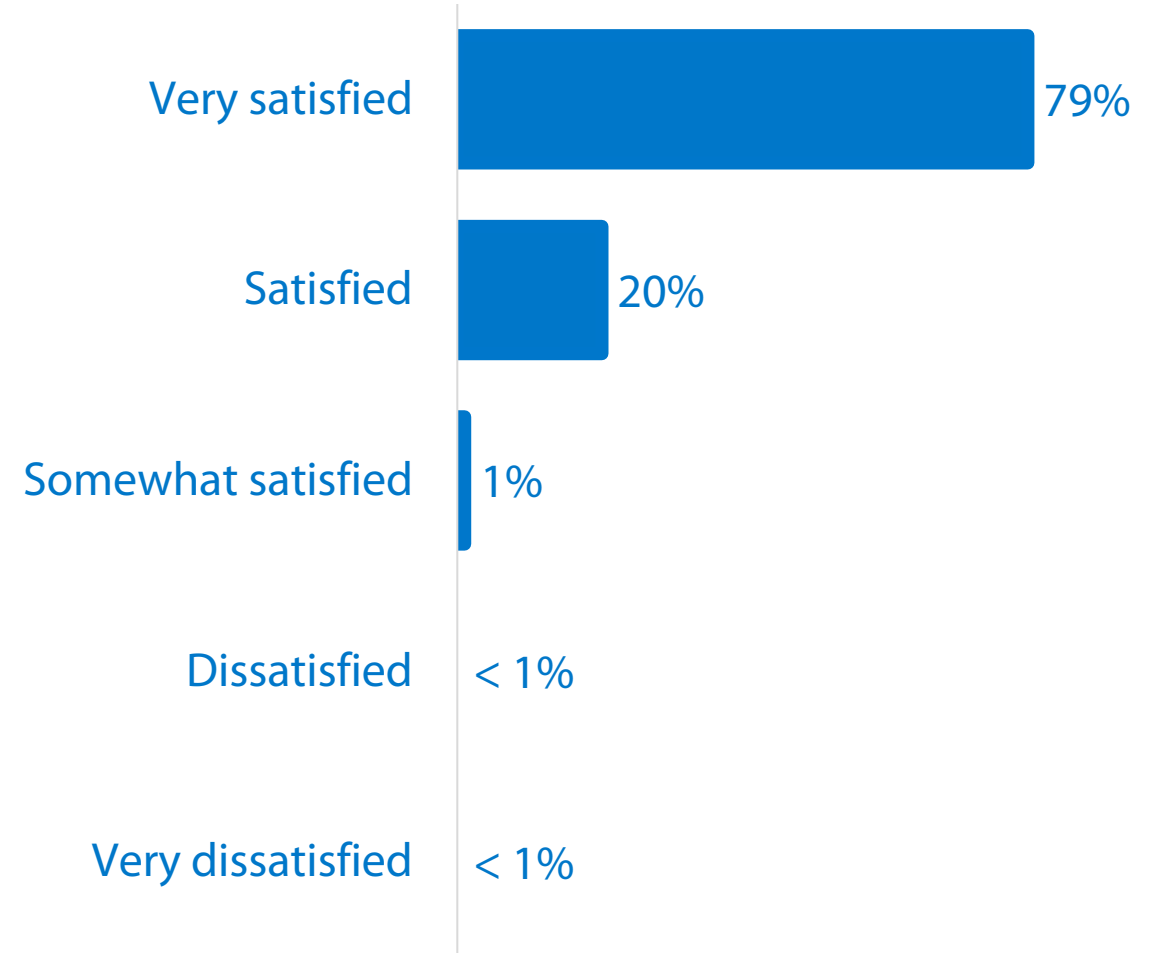
APRIL TO JUNE 2025

	All Visitors 2024	All Visitors 2025
Accommodations	\$600	\$593
Restaurants	\$388	\$425
Groceries	\$92	\$78
Shopping	\$160	\$140
Entertainment	\$192	\$199
Transportation	\$108	\$94
Other	\$12	\$8
Total Spending	\$1,552	\$1,537

VISITOR JOURNEY: POST-TRIP

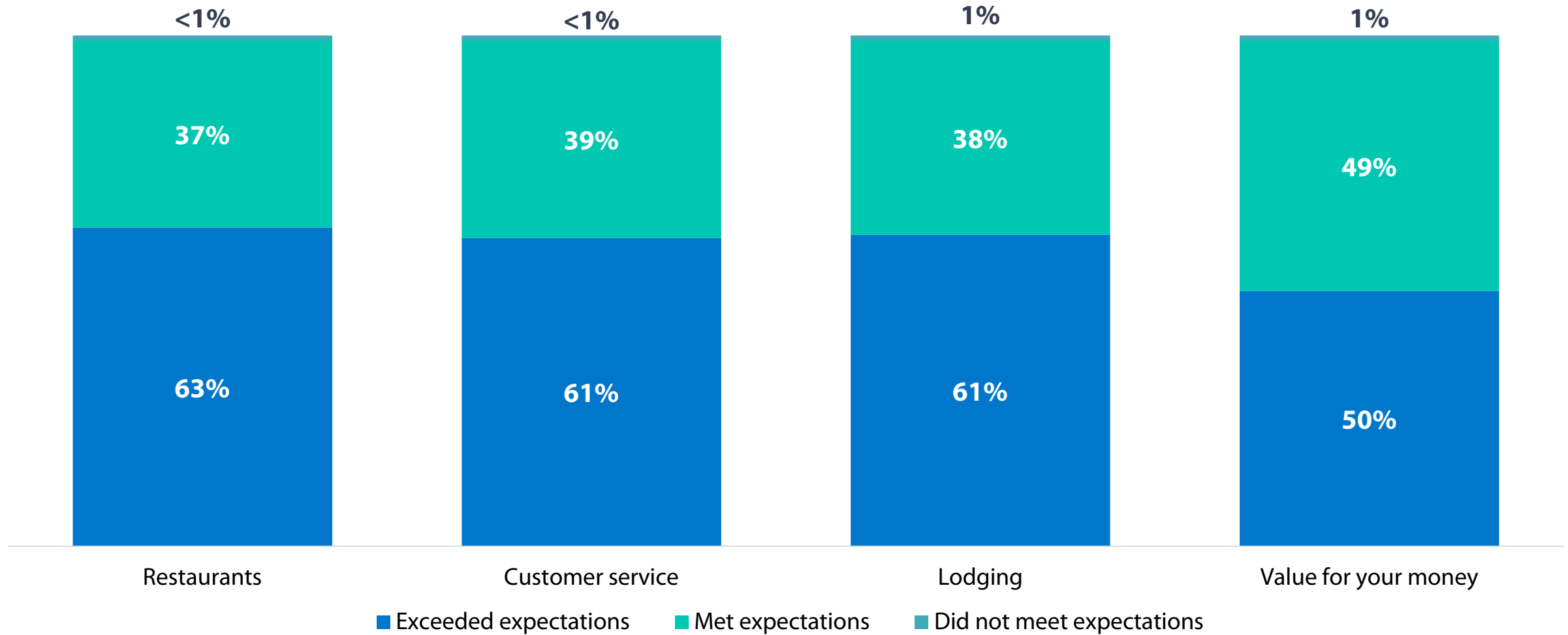


- » **99%** of visitors were **satisfied** with their trip to the Pensacola area (98% in 2024)
- » **Nearly 4 in 5** visitors were **very satisfied** with their trip to the Pensacola area (77% in 2024)

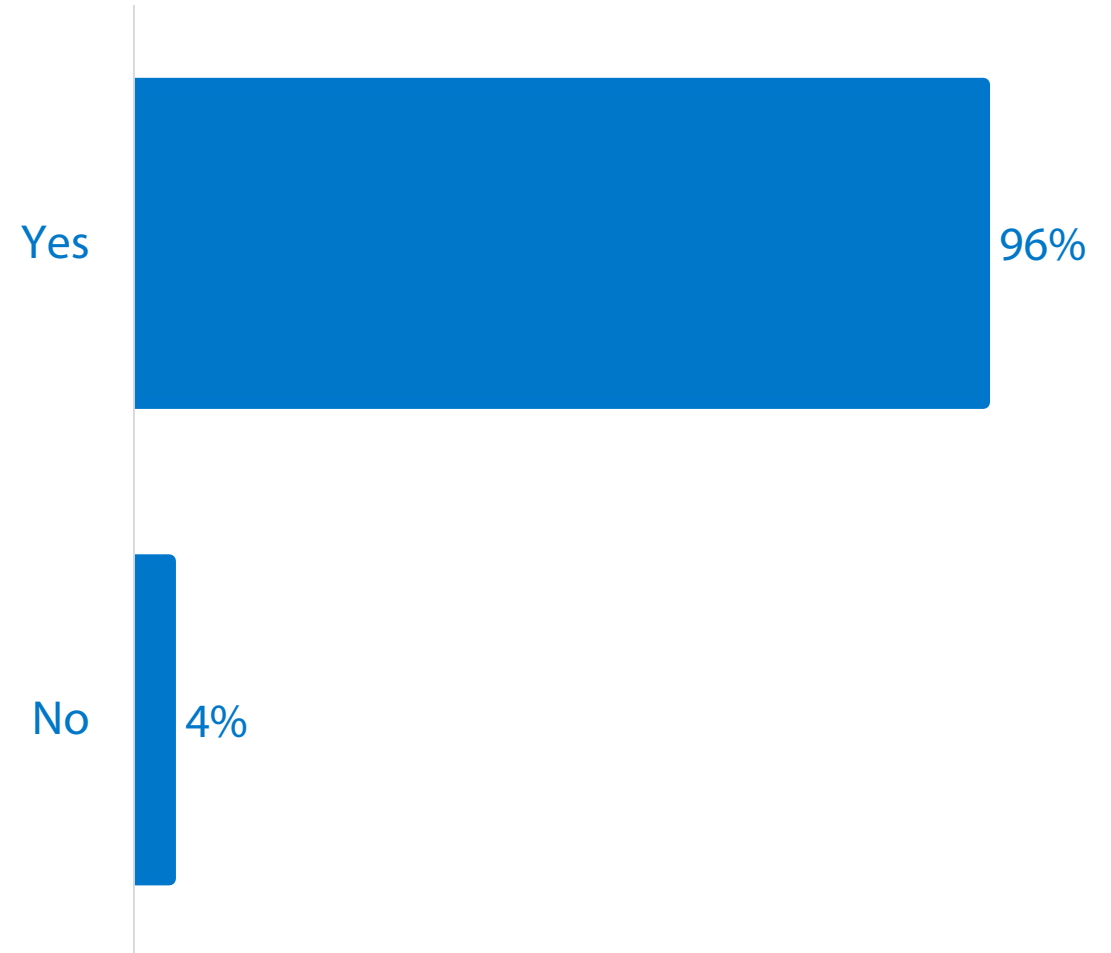


SATISFACTION RATINGS

APRIL TO JUNE 2025



» **Over 9 in 10** visitors would recommend the Pensacola area to others (93% in 2024)



- » **99%** of visitors would **return** to the Pensacola area (99% in 2024)
- » **Over 7 in 10** visitors would **definitely return** to the Pensacola area (70% in 2024)
- » Of visitors who would not return, the reason listed most often was **preference for a variety in vacation spots**



*Those who said they will not return were asked why they were uncertain.



- » "Would love to visit more often. There's so much to see and do. We are only here for four days and it's not nearly enough. Fried food heaven, really good food in town and at the beach."
- » "We want to move here. Pensacola has the best beaches and everyone is so friendly!"
- » "We came for the beach and museum but will come back for the people. I've never met such friendly people."
- » "Every time we come back, we don't want to leave. It's very relaxing, even with the kids. The pier, the boardwalk, the beach and pool, many other families with other kids to play with, mini golf and the arcade. Lots of fun!"
- » "Great for the whole family and everything you might need is close by. Beautiful, accessible, accommodating, friendly, and feels safe."

*Open-ended responses. Multiple responses permitted.



- » "Downtown is so nice, just hate the parking."
- » "Good restaurants. Downtown is amazing, except for parking."
- » "Parking situation is ridiculous. Paid way too much to park not knowing it wasn't city parking."
- » "Go Retro Tour hop on/off too rushed. Would be better to see town on your own."

*Open-ended responses. Multiple responses permitted.



Visitor Tracking Study

- » Interviews were completed in person and online with **1,020 visitors** at the airport, beach, downtown, Naval Aviation Museum, and events between **April 1 and June 30, 2025**.

VISIT PENSACOLA

Visitor Tracking Study April – June 2025

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