

VISIT PENSACOLA

VISITOR TRACKING STUDY

APRIL-JUNE 2026



METHODOLOGY



Interviews were completed in-person and online with **973** visitors between **April 1 and June 30, 2026**.

In-person surveying locations included:

- » Downtown Pensacola
- » The Historic Village
- » Pensacola Beach
- » Perdido Key
- » Pensacola International Airport
- » Pensacola Lighthouse
- » National Aviation Museum
- » Local Events

KEY PERFORMANCE INDICATORS



KEY PERFORMANCE INDICATORS

APRIL TO JUNE 2026



823,500

TOTAL
VISITORS

vs. 2025

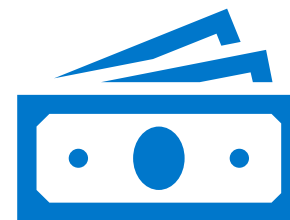
↑ 7.7%



765,900

ROOM
NIGHTS¹

↑ 5.1%



\$430,305,700

DIRECT
SPENDING

↑ 4.3%



\$6,568,990

TOURIST
DEVELOPMENT TAX²

↑ 7.6%

LODGING METRICS

APRIL TO JUNE 2026

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

COMBINED



71.6%

OCCUPANCY

↑ 1.5%



\$204.88

AVERAGE DAILY
RATE

↑ 4.6%



\$146.78

REVENUE PER
AVAILABLE ROOM

↑ 6.1%

HOTELS¹



72.7%

OCCUPANCY

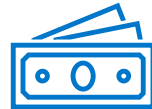
↑ 1.5%



\$168.12

AVERAGE DAILY
RATE

↑ 3.2%



\$122.15

REVENUE PER
AVAILABLE ROOM

↑ 4.8%

VACATION RENTALS²



68.4%

OCCUPANCY

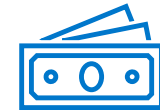
↑ 3.8%



\$323.86

AVERAGE DAILY
RATE

↑ 4.1%



\$221.39

REVENUE PER
AVAILABLE ROOM

↑ 8.1%

vs. 2025

DAILY TRAVEL PARTY SPENDING

APRIL TO JUNE 2026

	ALL VISITORS ¹ 2025	ALL VISITORS ¹ 2026
Accommodations ¹	\$128	\$137
Restaurants	\$109	\$115
Groceries	\$20	\$18
Shopping	\$36	\$37
Entertainment	\$51	\$45
Transportation	\$24	\$25
Other	\$2	\$1
Daily Spending	\$370	\$378

¹Including visitors staying in paid accommodations, with friends/relatives or second homes, and day trippers.

TOTAL TRAVEL PARTY SPENDING

APRIL TO JUNE 2026

	ALL VISITORS ¹ 2025	ALL VISITORS ¹ 2026
Accommodations ¹	\$499	\$534
Restaurants	\$425	\$449
Groceries	\$78	\$70
Shopping	\$140	\$144
Entertainment	\$199	\$176
Transportation	\$94	\$98
Other	\$8	\$4
Total Spending	\$1,443	\$1,475

¹Including visitors staying in paid accommodations, with friends/relatives or second homes, and day trippers.

	APRIL – JUNE 2025	APRIL – JUNE 2026	% Δ
Visitors	764,700	823,500	+7.7%
Direct Spending	\$412,725,500	\$430,305,700	+4.3%
Room Nights ¹	728,700	765,900	+5.1%
TDT ²	\$6,105,246	\$6,568,990	+7.6%

¹ Sources: Smith Travel Research, Key Data, and Department of Business and Professional Regulation (DBPR).

² Sources: Clerk & Comptroller Escambia County.

LODGING METRICS YOY

APRIL TO JUNE 2026

COMBINED LODGING METRICS	APRIL – JUNE 2025	APRIL – JUNE 2026	% Δ
Occupancy	70.6%	71.6%	+1.5%
ADR	\$195.93	\$204.88	+4.6%
RevPAR	\$138.34	\$146.78	+6.1%

HOTEL METRICS ¹	APRIL – JUNE 2025	APRIL – JUNE 2026	% Δ
Occupancy	71.6%	72.7%	+1.5%
ADR	\$162.92	\$168.12	+3.2%
RevPAR	\$116.58	\$122.15	+4.8%

VACATION RENTAL METRICS ²	APRIL – JUNE 2025	APRIL – JUNE 2026	% Δ
Occupancy	65.8%	68.4%	+3.8%
ADR	\$311.10	\$323.86	+4.1%
RevPAR	\$204.82	\$221.39	+8.1%

¹ Source: Smith Travel Research.

² Source: Key Data.

VISITOR PROFILE SUMMARY





31%
Viewed Visitor Guide

27%
First-time Visitor

3.1
Travel Party Size²

79%
Drove

43%
Traveled with children¹

3.9
Length of Stay²

¹Children are defined as people under 20 years old.

²Includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.



Paid accommodations¹
67%
(66% in 2025)



Day trippers
21%
(21% in 2025)

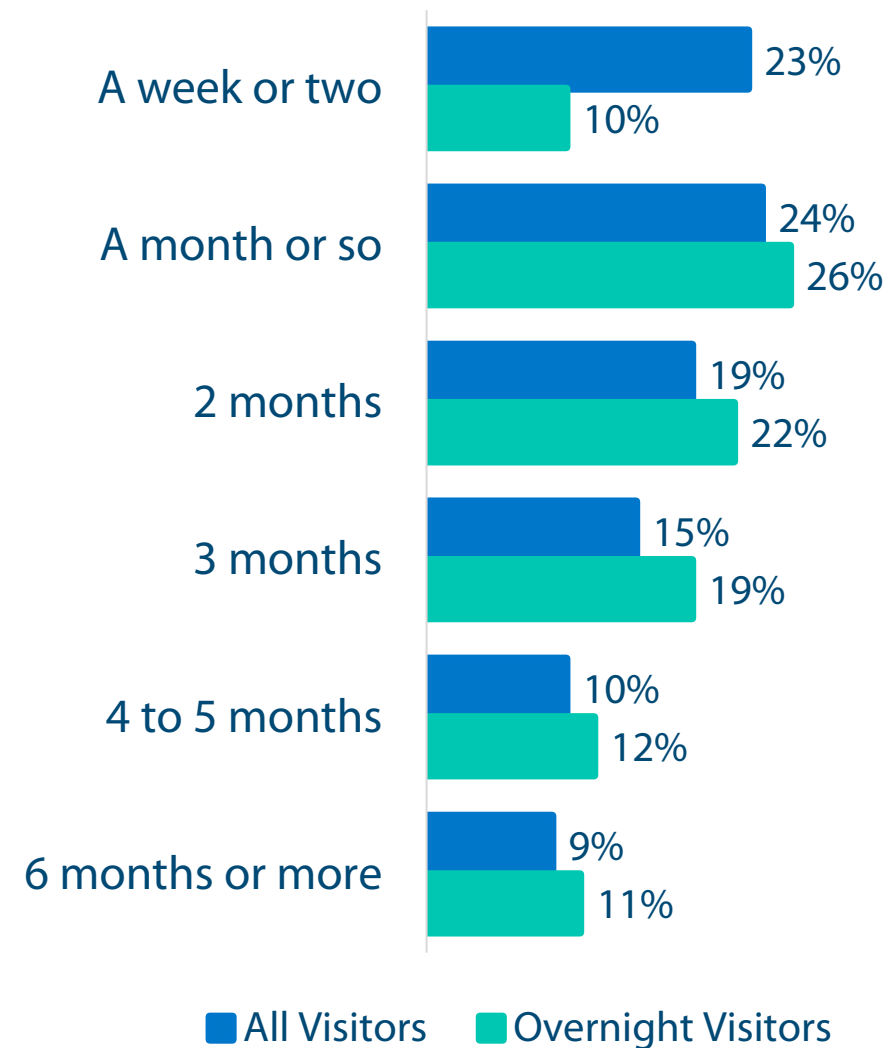


Nonpaid accommodations²
12%
(13% in 2025)

TRIP PLANNING CYCLE

APRIL TO JUNE 2026

- » On average, visitors¹ planned their trip to the Pensacola area **64 days in advance** (64 days in 2025)
- » Visitors staying overnight² had a slightly longer trip planning period of **74 days in advance** (79 days in 2025)



¹Includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.

²Includes visitors staying in paid accommodations and nonpaid accommodations.

TOP TRIP PLANNING SOURCES¹

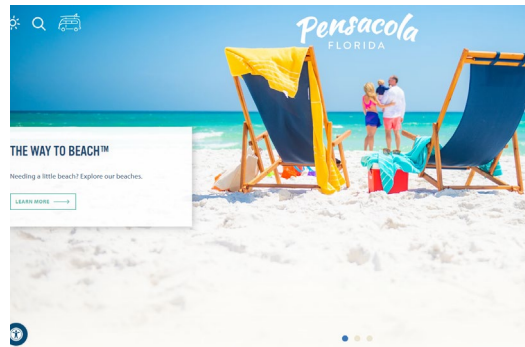
APRIL TO JUNE 2026



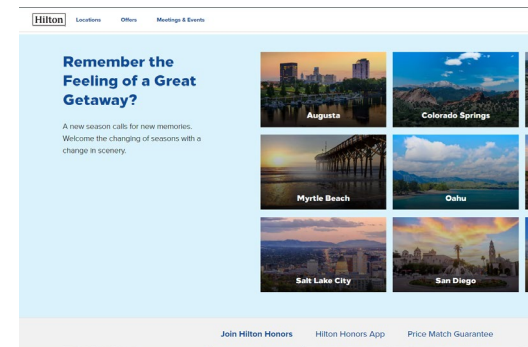
Search sites
71%
(78% in 2025)



Friends/family
33%
(43% in 2025)



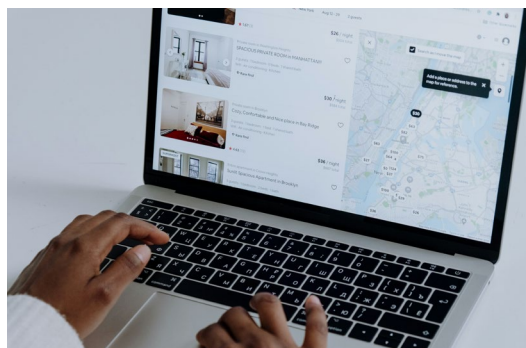
VisitPensacola.com
31%
(23% in 2025)



Hotel websites/apps
29%
(31% in 2025)



Airline websites/apps
28%
(26% in 2025)



Vacation rental websites
27%
(27% in 2025)



Personal social media
23%
(20% in 2025)

¹ Multiple responses permitted.

TOP REASONS FOR VISITING¹

APRIL TO JUNE 2026



Beach
53%
(49% in 2025)



Relax and unwind
38%
(35% in 2025)



Visit friends/relatives
20%
(26% in 2025)



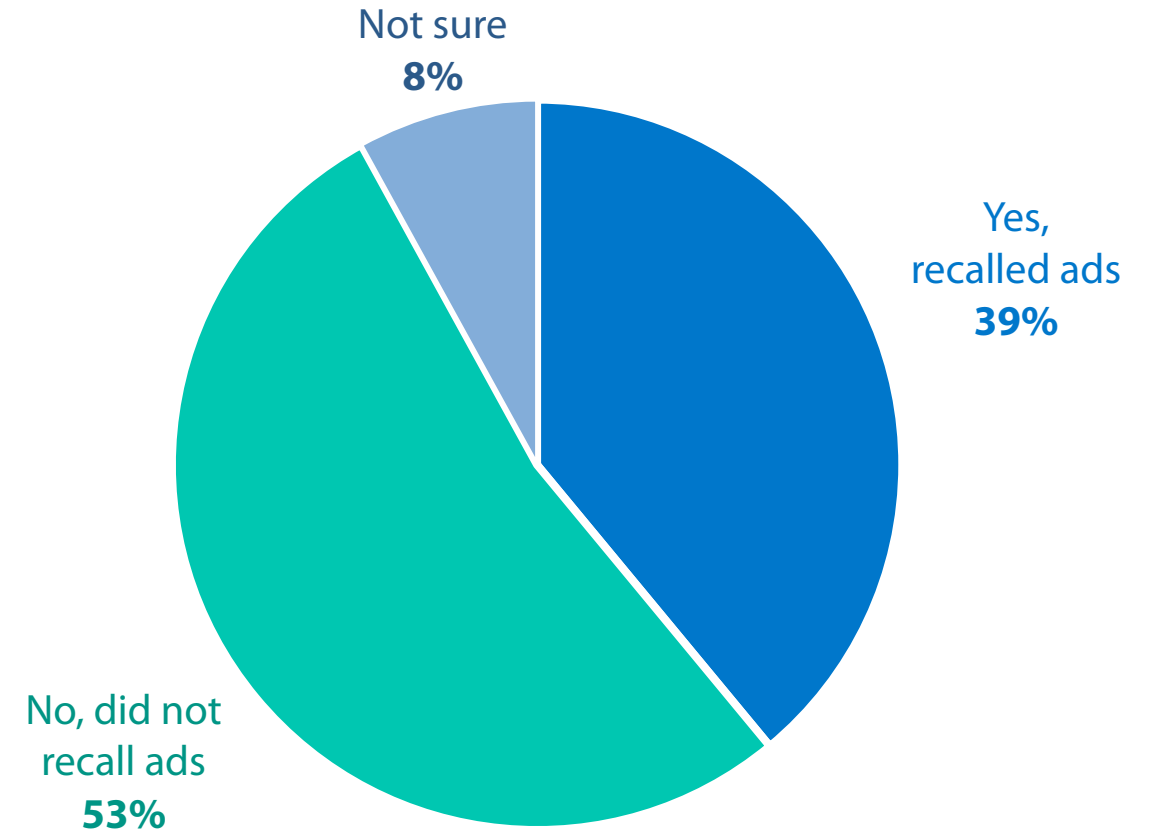
Family time
15%
(11% in 2025)



Special occasion
14%
(20% in 2025)

¹ Up to three responses permitted

» **39%** of visitors **recalled advertising** about the Pensacola area (37% in 2025)



¹ Note: These figures are topline and solely rely on the memory of each visitor even though various other factors go into the influence of advertising.

TOP SOURCES OF AD RECALL

APRIL TO JUNE 2026

Base: **39%** of visitors who recalled advertising



VisitPensacola.com
40%
(36% in 2025)



Personal social media
40%
(31% in 2025)

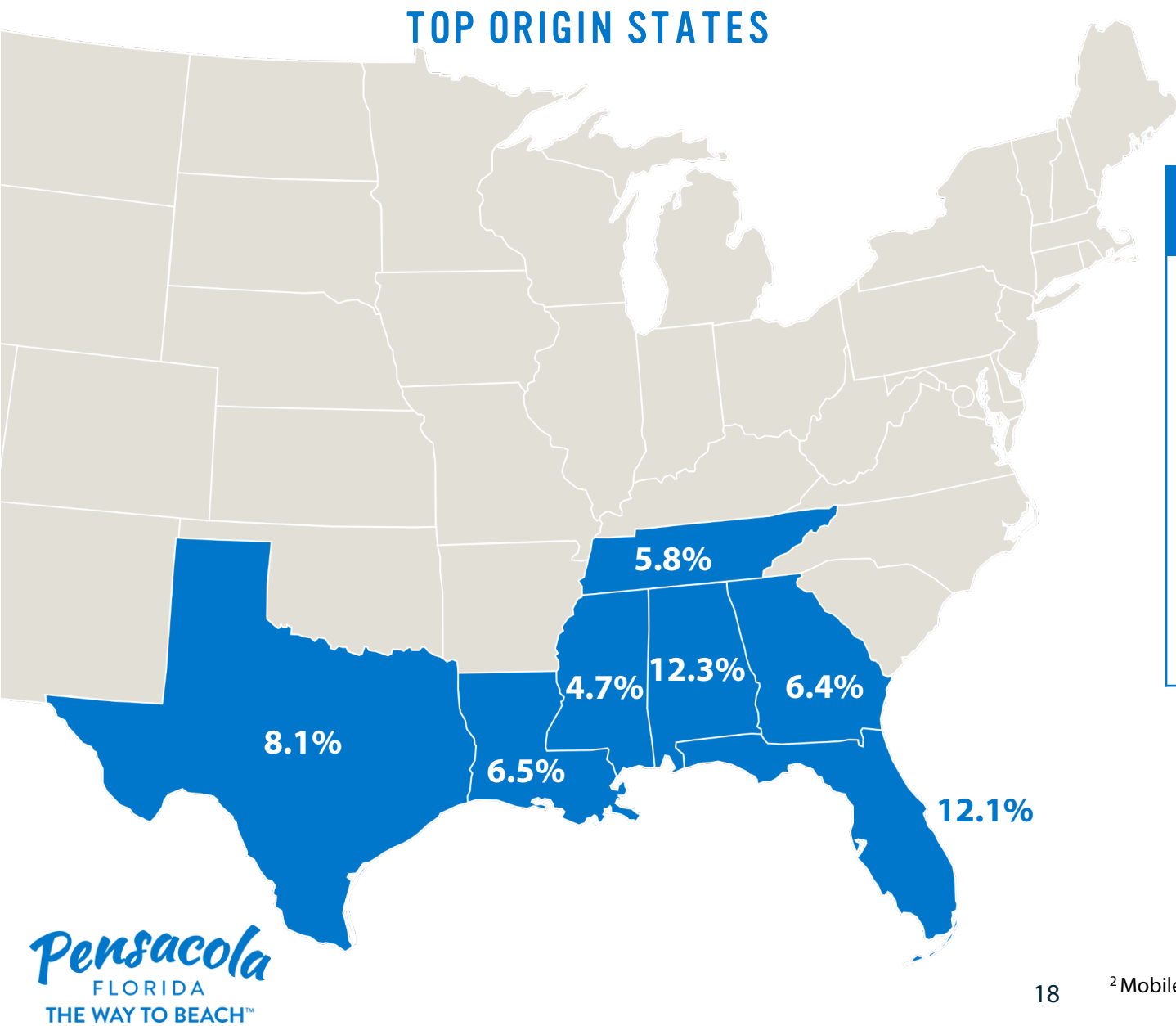


Television
23%
(23% in 2025)



Traveler reviews/blogs
21%
(16% in 2025)

¹ Multiple responses permitted.



TOP MARKETS	2025	2026
Mobile ²	13.9%	12.2%
Atlanta	4.4%	5.1%
New Orleans	3.7%	3.5%
Nashville	2.8%	3.3%
Dallas – Fort Worth	2.7%	3.0%
Birmingham	3.2%	2.9%
Houston	1.5%	2.0%

1.5% of visitors traveled to the Pensacola area from **outside of the U.S.** The majority of international visitors came from Ontario (0.6%), Quebec (0.3%), and the United Kingdom (0.3%).

¹ Sources: Zartico and Visitor Tracking Study.

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

downs & st. germain
RESEARCH

TOP ACTIVITIES DURING VISIT¹

APRIL TO JUNE 2026



Restaurants
87%
(84% in 2025)



Beach
79%
(77% in 2025)



Relax and unwind
77%
(77% in 2025)



Shopping
51%
(51% in 2025)



Art galleries/museums
44%
(37% in 2025)



Attractions
35%
(39% in 2025)



Family time
33%
(31% in 2025)



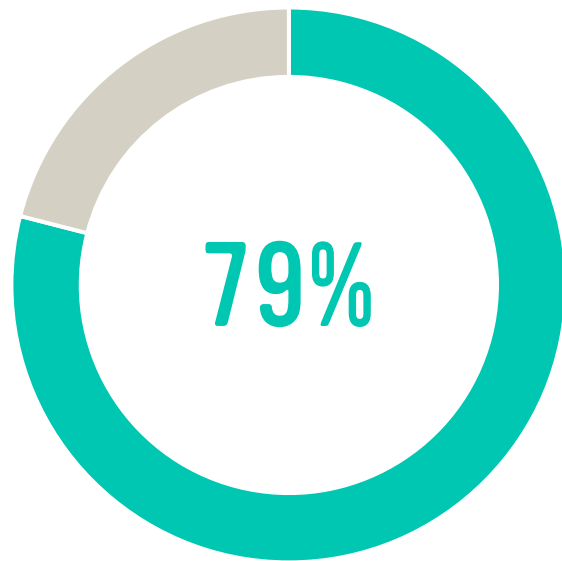
Water sports
30%
(25% in 2025)



Bars/nightclubs
29%
(35% in 2025)

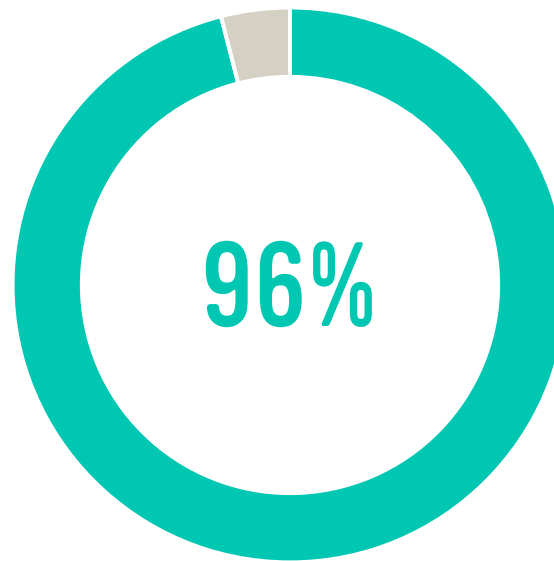


Visit friends/relatives
27%
(35% in 2025)



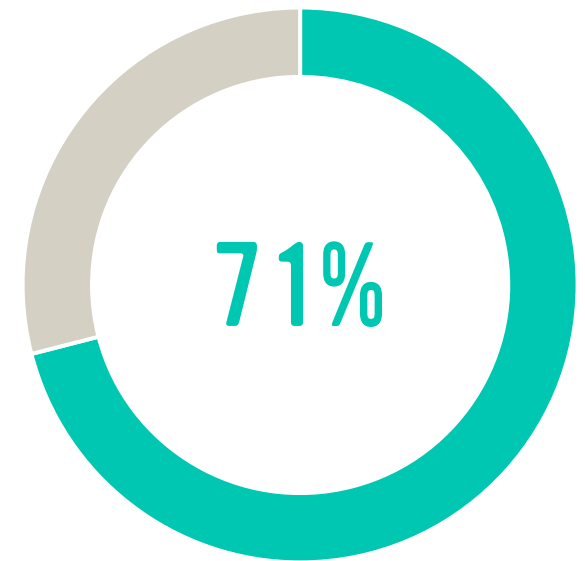
VERY SATISFIED

Nearly 4 in 5 visitors were very satisfied with their stay in the Pensacola area.



LIKELIHOOD TO RECOMMEND

Almost all visitors would recommend the Pensacola area to others.

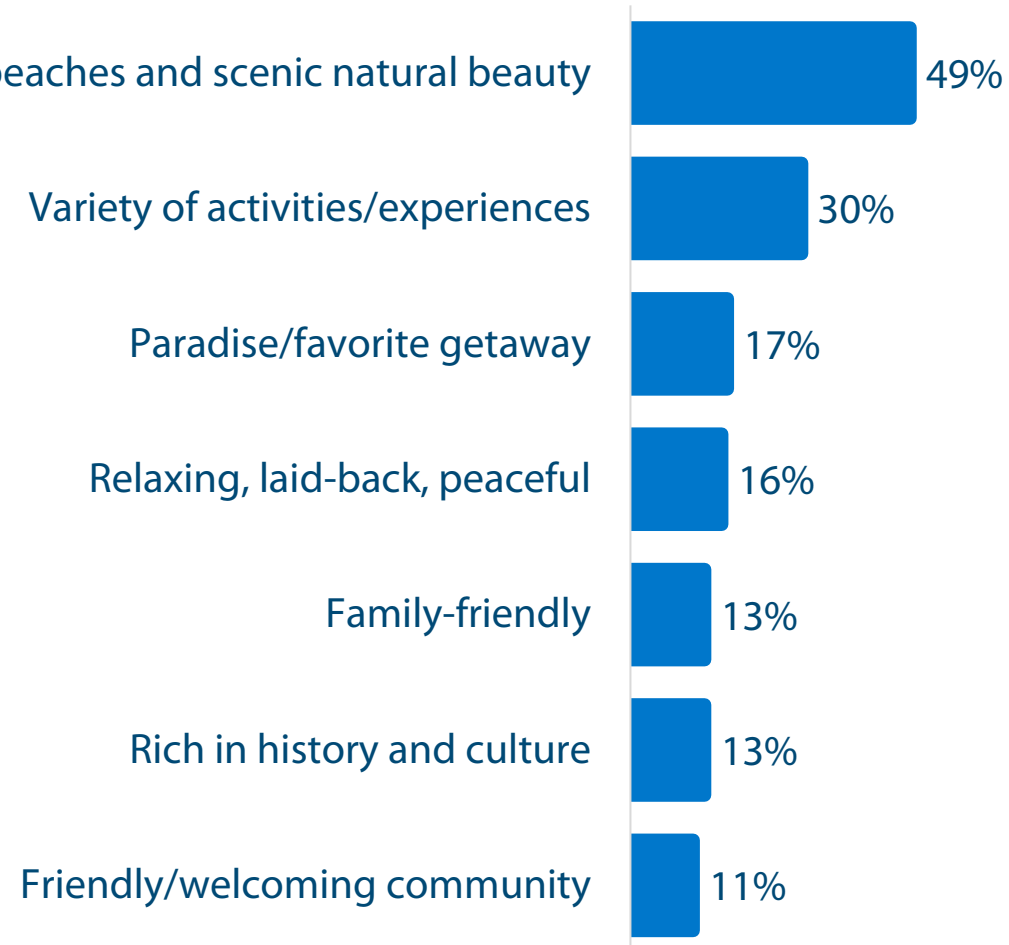


DEFINITELY WILL RETURN

Over 7 in 10 visitors will definitely return to the Pensacola area.

» Visitors were asked, “If you were talking to a friend, how would you describe the Pensacola area as a place to visit?”. From their responses, the following themes emerged. Highlighted most frequently was the **area’s beauty**, particularly the beach, and **variety of activities/experiences**.

» Areas of dissatisfaction included parking/traffic, crowds, high prices, and weather.



QUARTERLY SNAPSHOT: APRIL – JUNE 2026

COMPARED TO APRIL – JUNE 2025, IN APRIL – JUNE 2026...

- ☀️ **Occupancy** was up **+1.5%** and **ADR** was up **+4.6%**, resulting in a **RevPAR** that was up **+6.1%**.
- ☀️ Visitor **spending** was up **+4.3%** due to an **increase in visitation** (+7.7%), despite a decrease in spending per visitor (-3.2%).
- ☀️ An **increase in visitation** (+7.7%) and **increase in rental units** (+3.7%) contributed to an **increase in room nights** (+5.1%) and **TDI** (+7.6%).
- ☀️ More visitors utilized **VisitPensacola.com** (+8% points), **online travel reviews** (+5% points), and **All websites/apps** (+5% points) to plan their trip.
- ☀️ More visitors utilized the online **Pensacola Visitor Guide** (+5% points).
- ☀️ Of the 39% of visitors who recalled advertising, they were more likely to see it on **VisitPensacola.com** (+4% points), **personal social media** (+9% points), and **traveler reviews/blogs** (+5% points).
- ☀️ Advertising influenced **26% of all visitors** to come to the Pensacola area (+9% points).
- ☀️ Excluding Florida, more visitors traveled from the **Southeast** (+6.9% points).
- ☀️ There was an **increase in first time visitors** (+4% points).
- ☀️ More visitors traveled with **children** under the age of 20 (+6% points).



VISITOR PROFILE DETAILED FINDINGS



STUDY OBJECTIVES: VISITOR JOURNEY



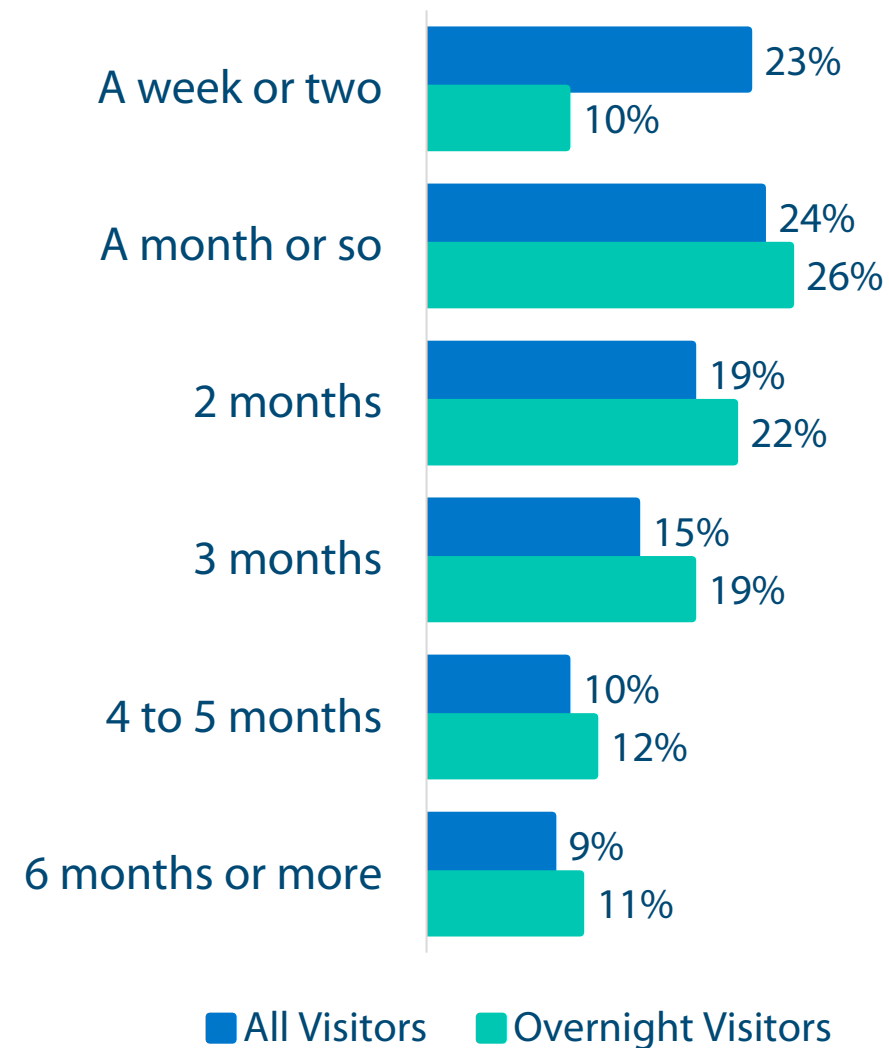
VISITOR JOURNEY: PRE-VISIT



- » On average, visitors¹ planned their trip to the Pensacola area **64 days in advance** (64 days in 2025)
- » Visitors staying overnight² had a slightly longer trip planning period of **74 days in advance** (79 days in 2025)

¹Includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.

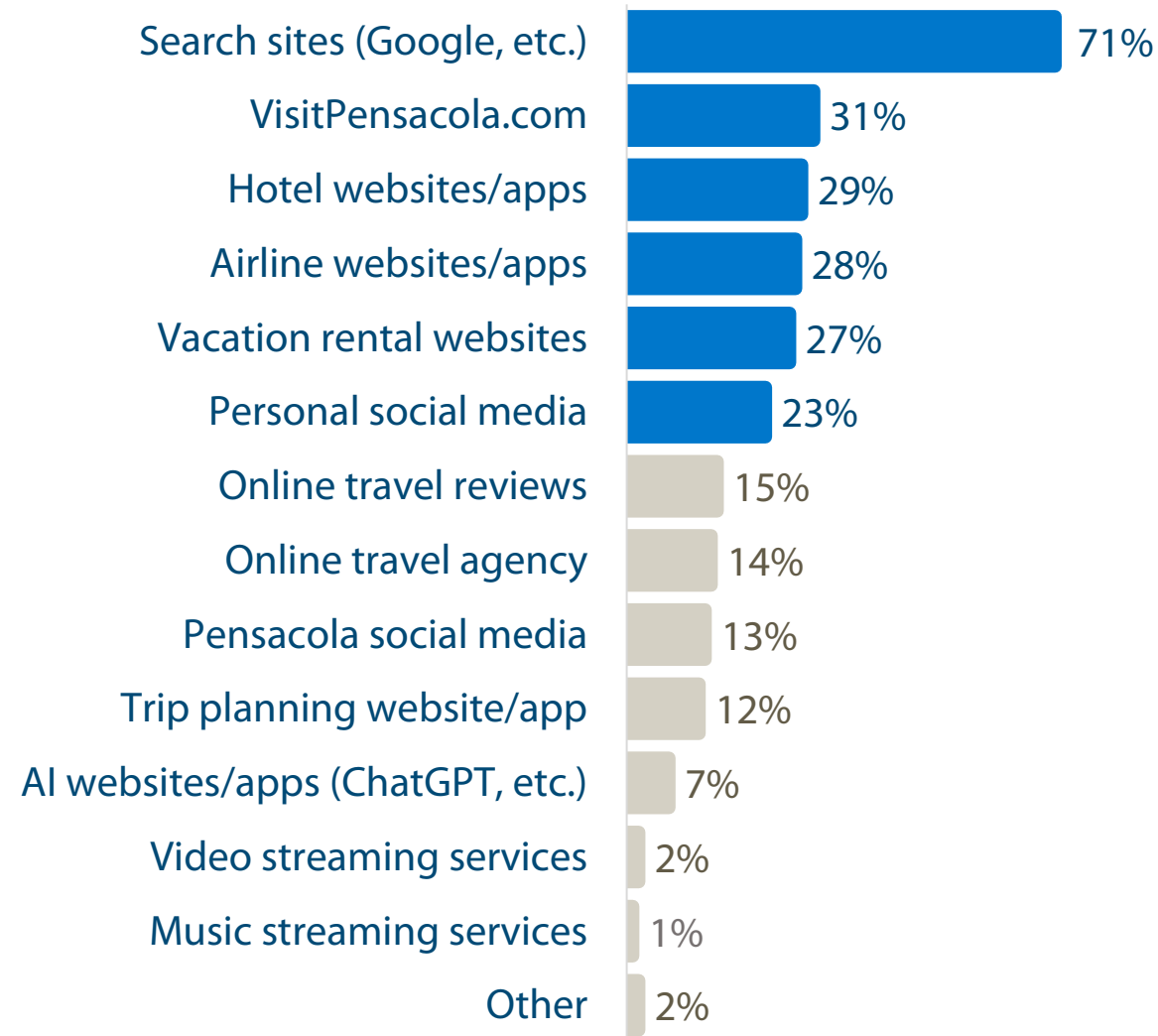
²Includes visitors staying in paid accommodations and nonpaid accommodations.



ONLINE TRIP PLANNING SOURCES¹

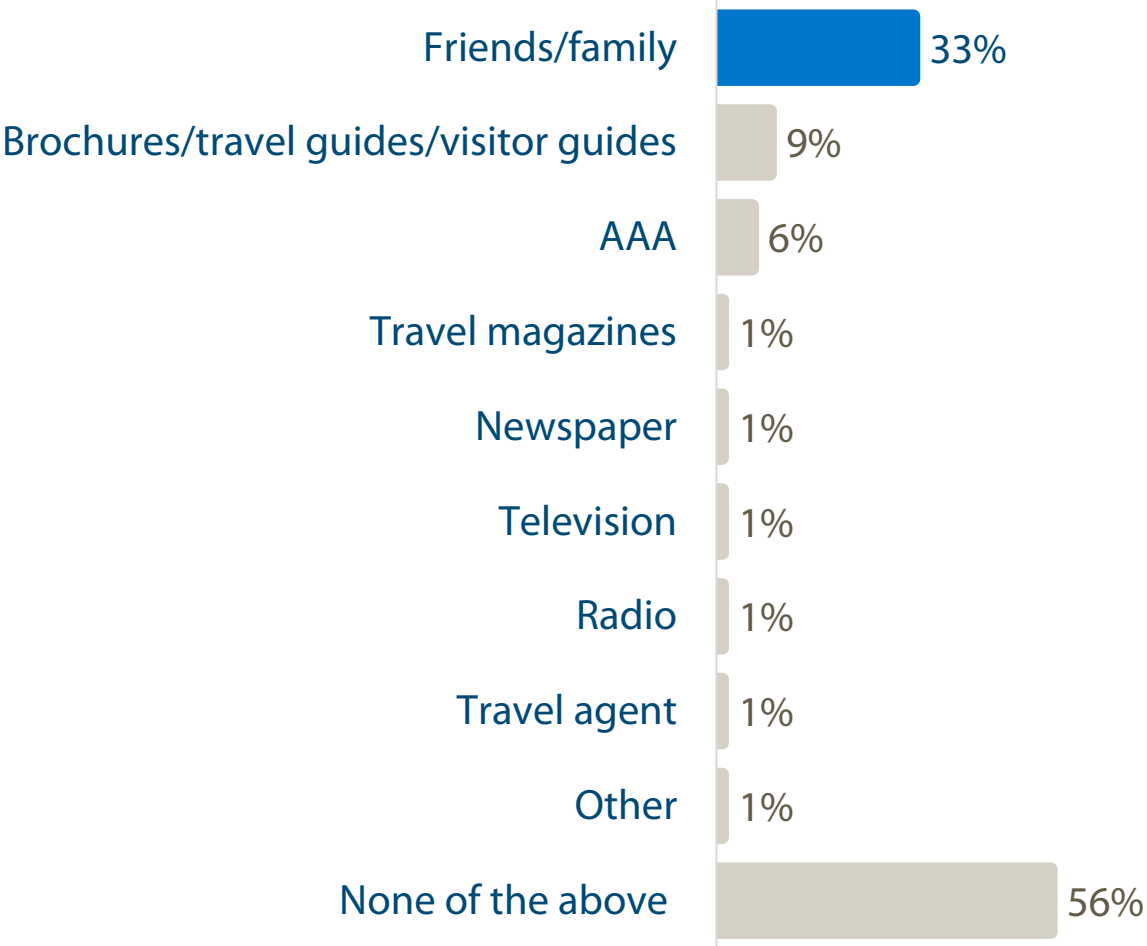
APRIL TO JUNE 2026

- » **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 **VisitPensacola.com** to plan their trip (+8% points compared to 2025)
- » **Nearly 3 in 10** visitors used **hotel websites/apps** to plan their trip
- » **Over 1 in 4** visitors used **airline websites/apps** or **vacation rental websites** to plan their trip
- » **Nearly 1 in 4** visitors used their **personal social media** to plan their trip



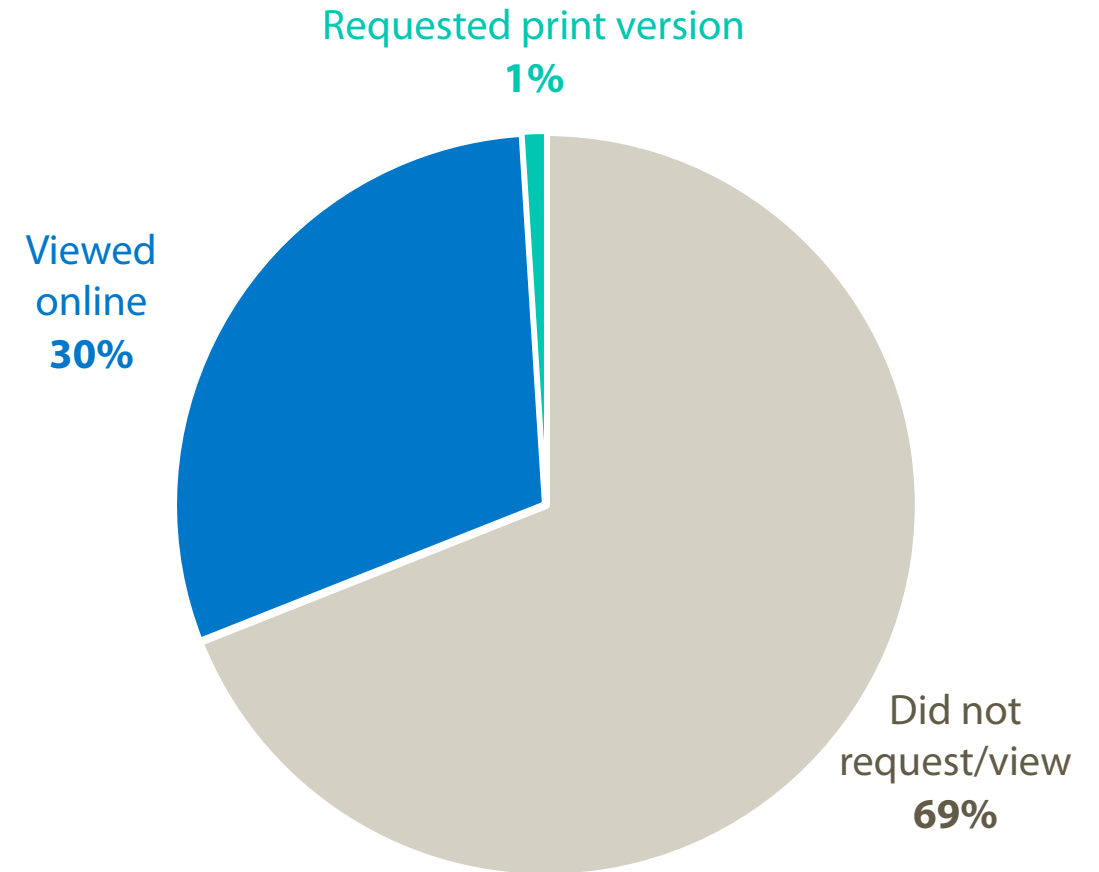
¹ Multiple responses permitted.

» **1 in 3** visitors planned their trip to the Pensacola area through **friends/family**



¹ Multiple responses permitted.

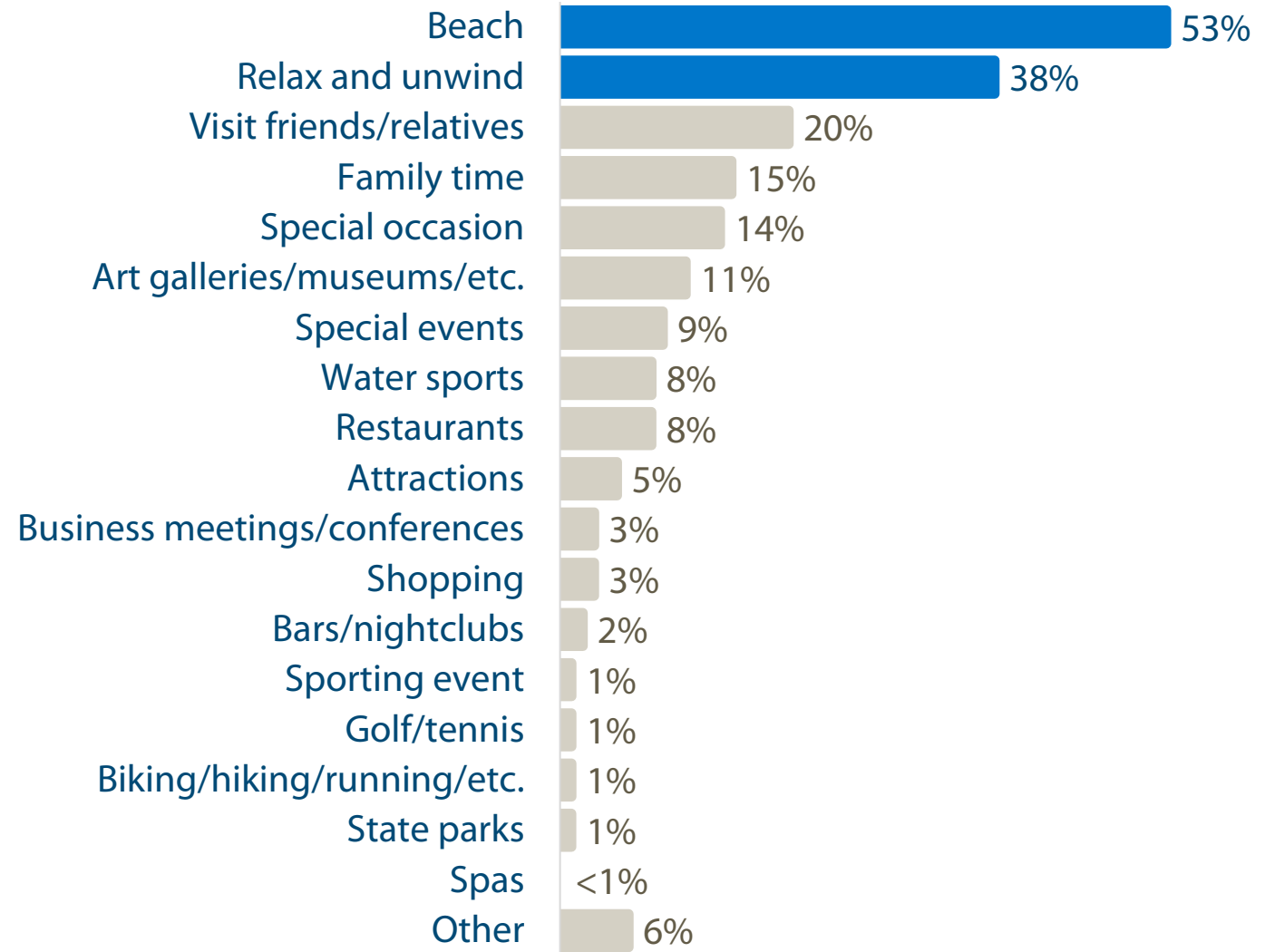
- » **Over 3 in 10** visitors **requested or viewed** the Pensacola Visitors Guide (26% in 2025)
- » **Online** viewership of the Pensacola Visitor Guide was **significantly greater than print consumption**



REASONS FOR VISITING¹

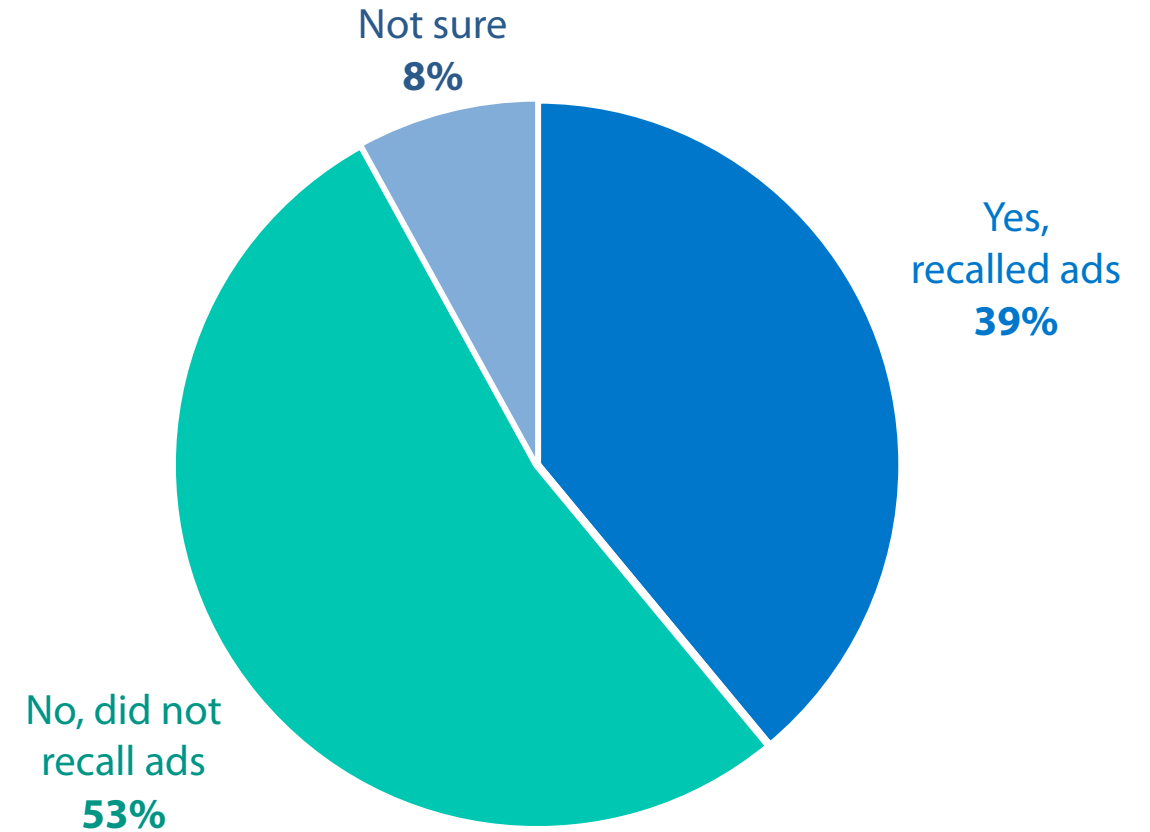
APRIL TO JUNE 2026

- » **Over half** of visitors came to the Pensacola area to visit the **beach**
- » **Nearly 2 in 5** visitors came to **relax and unwind**



¹ Up to three responses permitted

» **39%** of visitors **recalled advertising** about the Pensacola area (37% in 2025)



¹ Note: These figures are topline and solely rely on the memory of each visitor even though various other factors go into the influence of advertising.

Of the **39%** of visitors who **recalled advertising** about the Pensacola area:

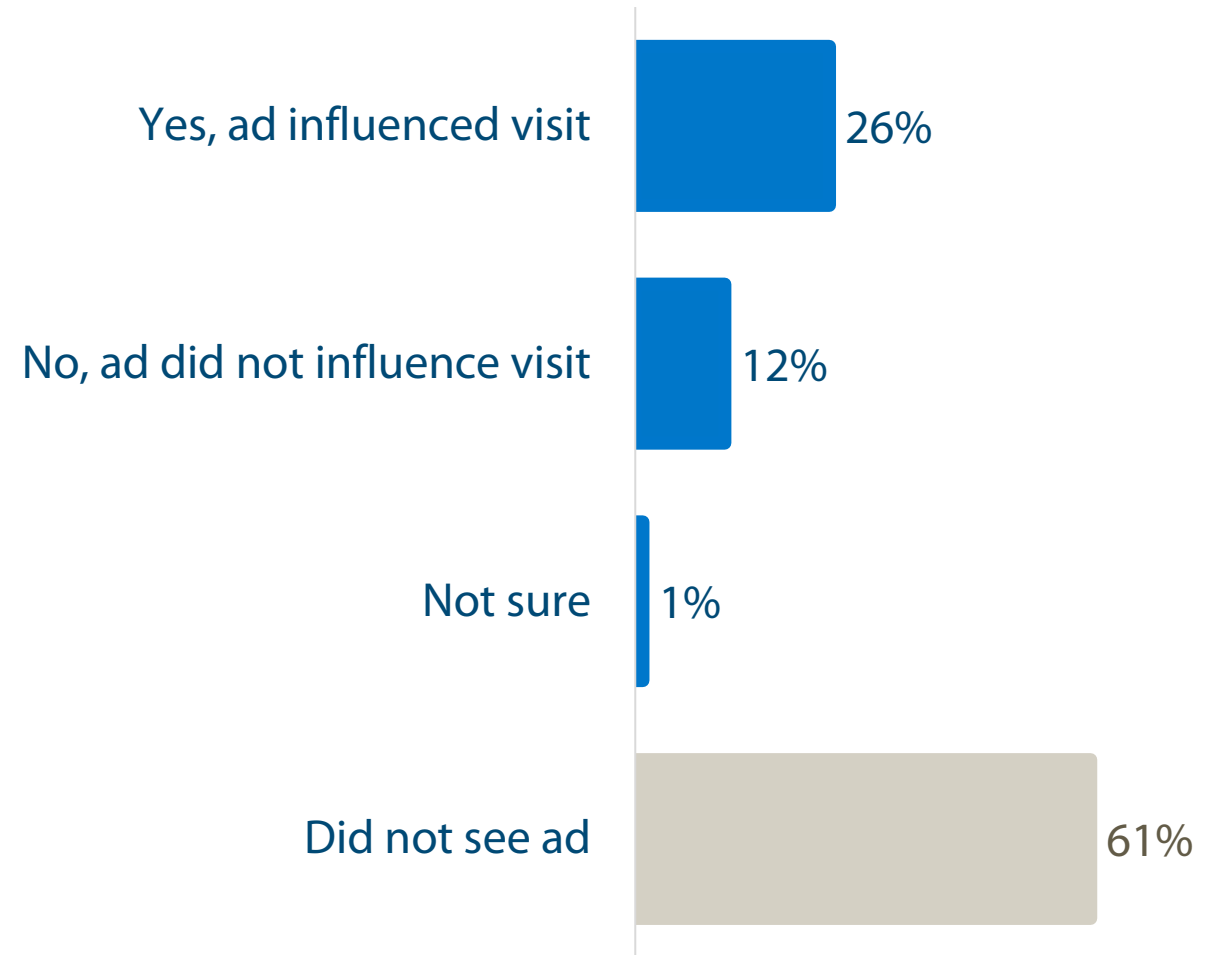
- » **2 in 5** visitors noticed advertising on **VisitPensacola.com**
- » **2 in 5** visitors noticed advertising on **personal social media**

Base: **39%** of visitors who recalled advertising



¹ Multiple responses permitted.

» **26%** of **all visitors** were influenced by an ad to visit the Pensacola area (17% in 2025)



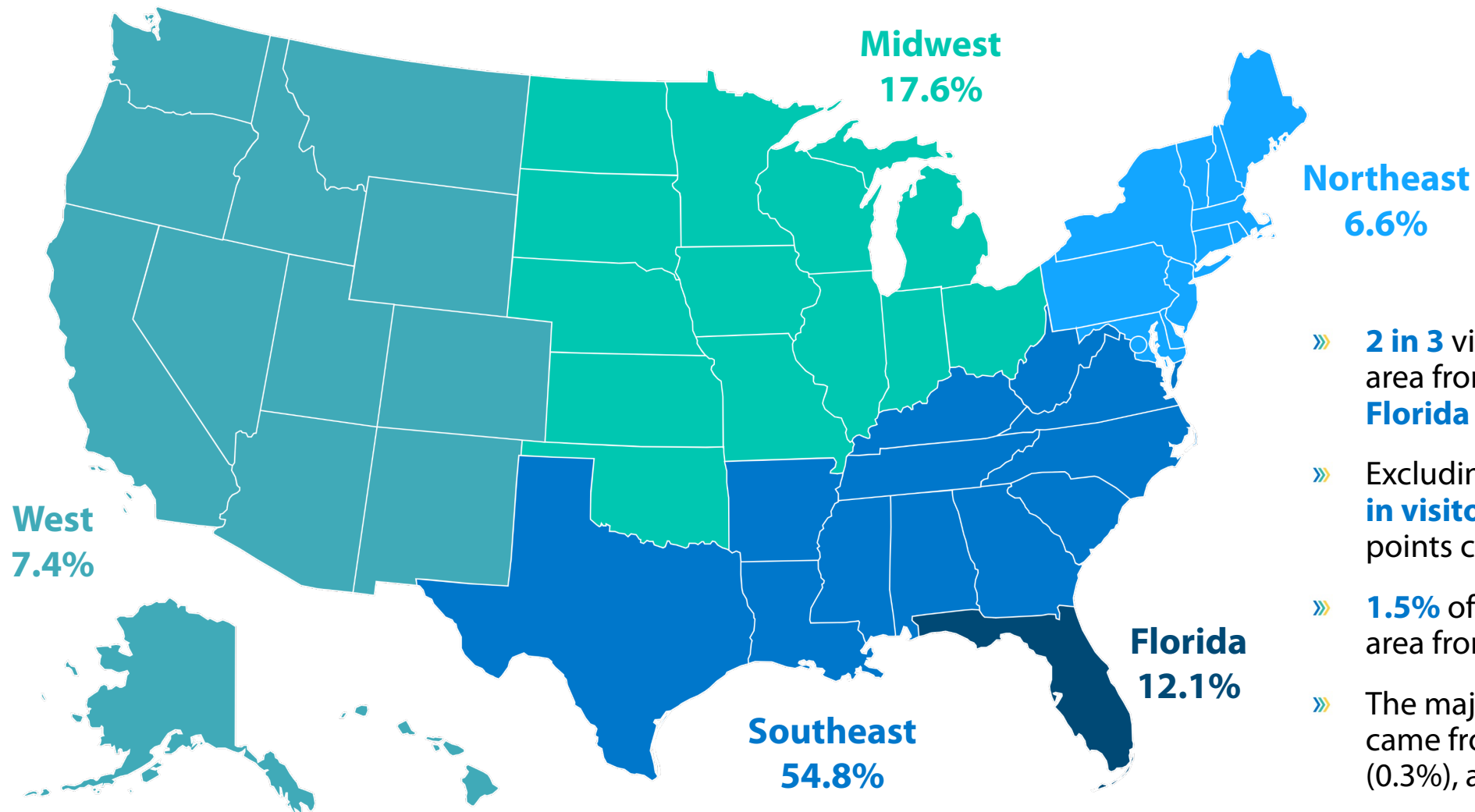
¹ Note: These figures are topline and solely rely on the memory of each visitor even though various other factors go into the influence of advertising.

VISITOR JOURNEY: TRAVEL PARTY PROFILE



REGION OF ORIGIN¹

APRIL TO JUNE 2026

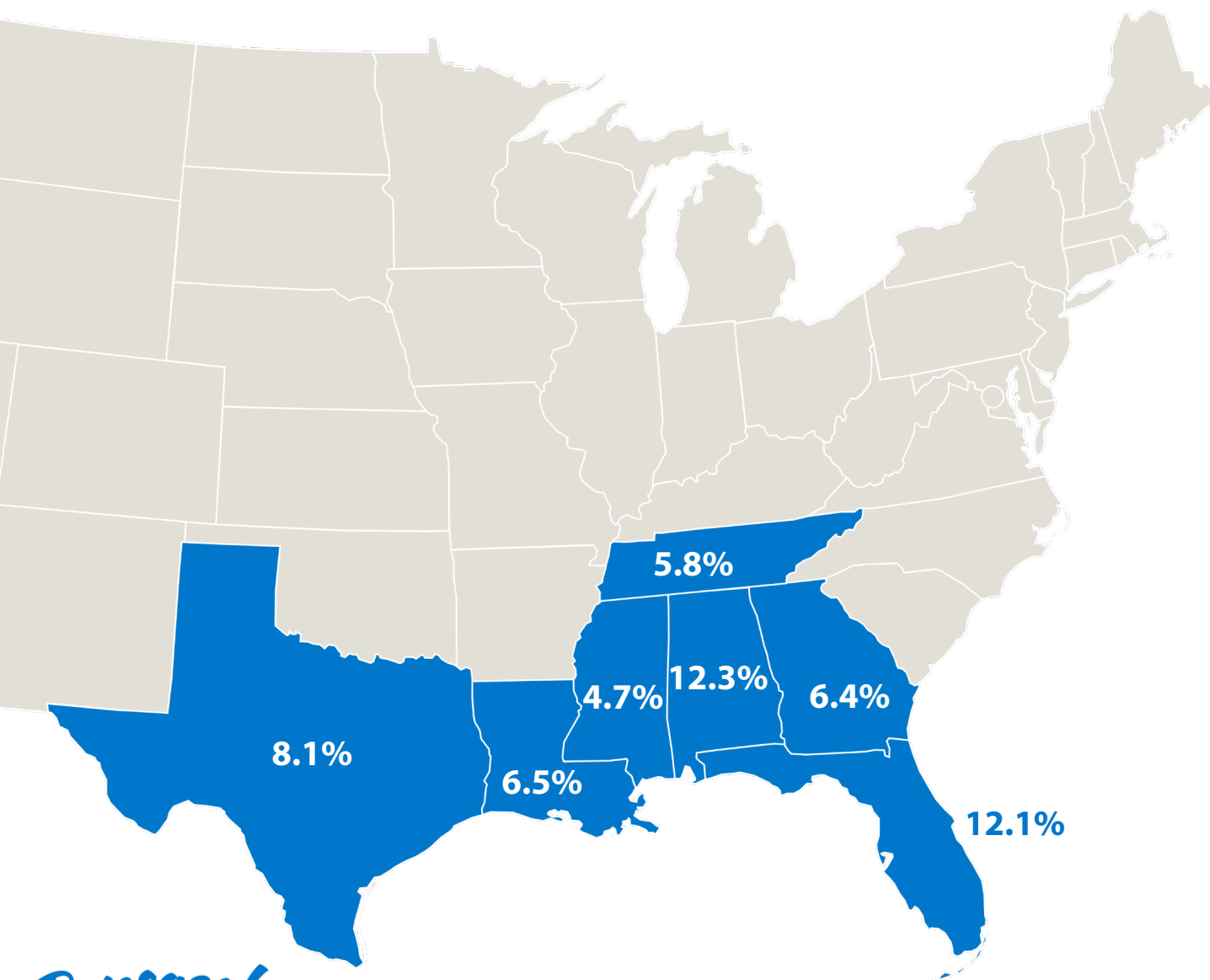


- » **2 in 3** visitors traveled to the Pensacola area from the **Southeast**, including **Florida**
- » Excluding Florida, there was an **increase in visitors from the Southeast** (+6.9% points compared to 2025)
- » **1.5%** of visitors traveled to the Pensacola area from **outside of the U.S.**
- » The majority of international visitors came from Ontario (0.6%), Quebec (0.3%), and the United Kingdom (0.3%)

¹ Sources: Zartico and Visitor Tracking Study.

STATE OF ORIGIN¹

APRIL TO JUNE 2026



STATE	2025	2026
Alabama	13.2%	12.3%
Florida	13.6%	12.1%
Texas	7.2%	8.1%
Louisiana	6.4%	6.5%
Georgia	5.9%	6.4%
Tennessee	5.0%	5.8%
Mississippi	4.6%	4.7%

¹ Sources: Zartico and Visitor Tracking Study.

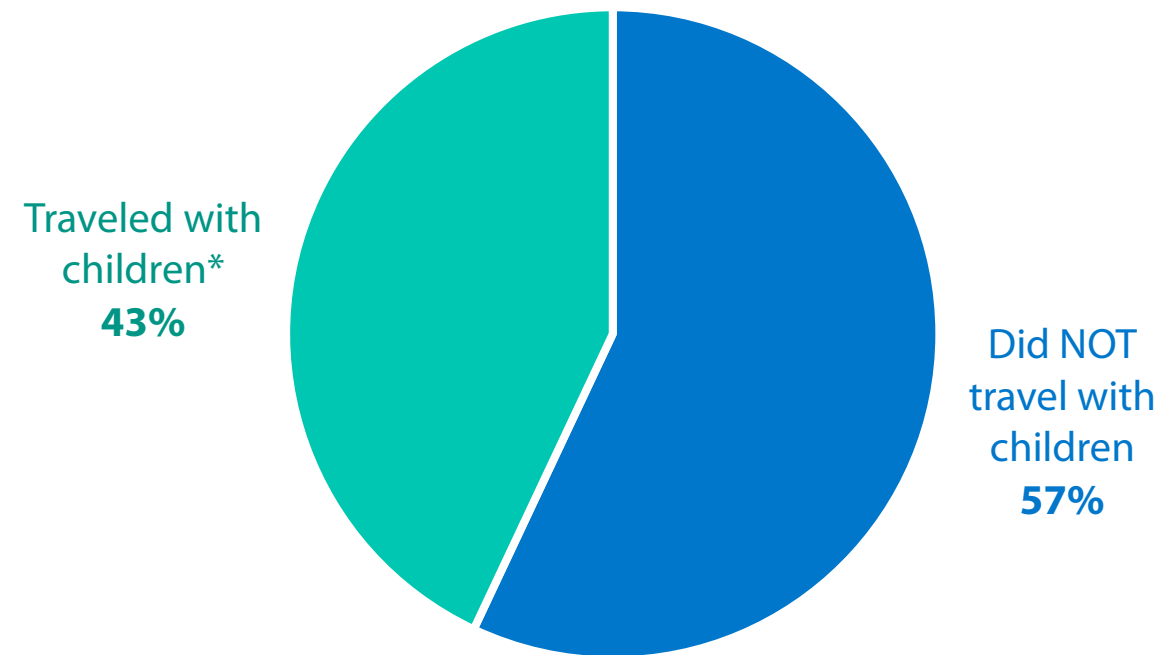
TOP MARKETS	2025	2026
Mobile ²	13.9%	12.2%
Atlanta	4.4%	5.1%
New Orleans	3.7%	3.5%
Nashville	2.8%	3.3%
Dallas – Fort Worth	2.7%	3.0%
Birmingham	3.2%	2.9%
Houston	1.5%	2.0%

- » **Mobile²** continues to be the top DMA for the Pensacola area
- » **32.0%** of visitors traveled from **7** market areas

¹ Sources: Zartico and Visitor Tracking Study.

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

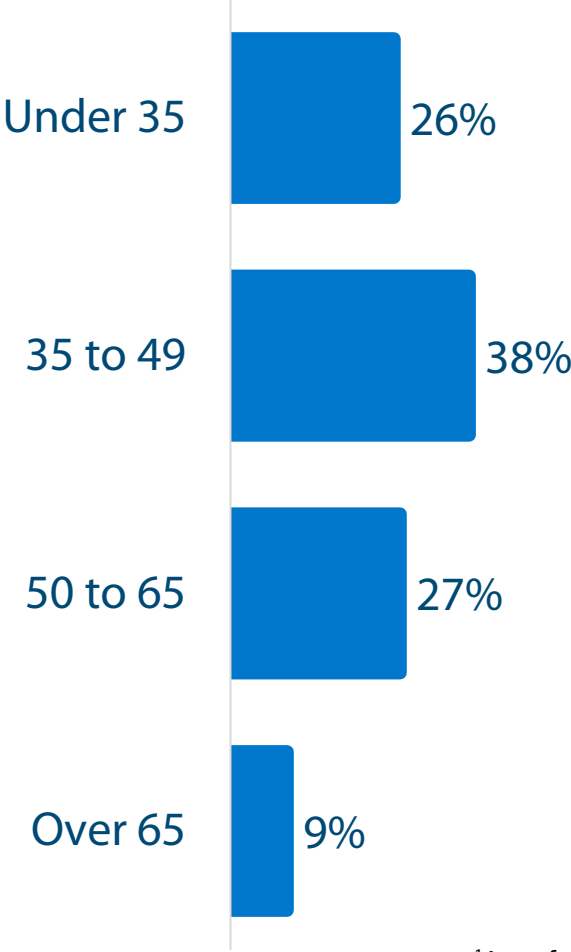
- » For **all visitors**¹, the typical **travel party size** was **3.1** (2.9 in 2025)
- » The typical **travel party size** for visitors staying in **paid accommodations** was **3.2** (3.1 in 2025)
- » **Over 2 in 5** travel parties included **children under the age of 20** (37% in 2025)



¹ Includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.

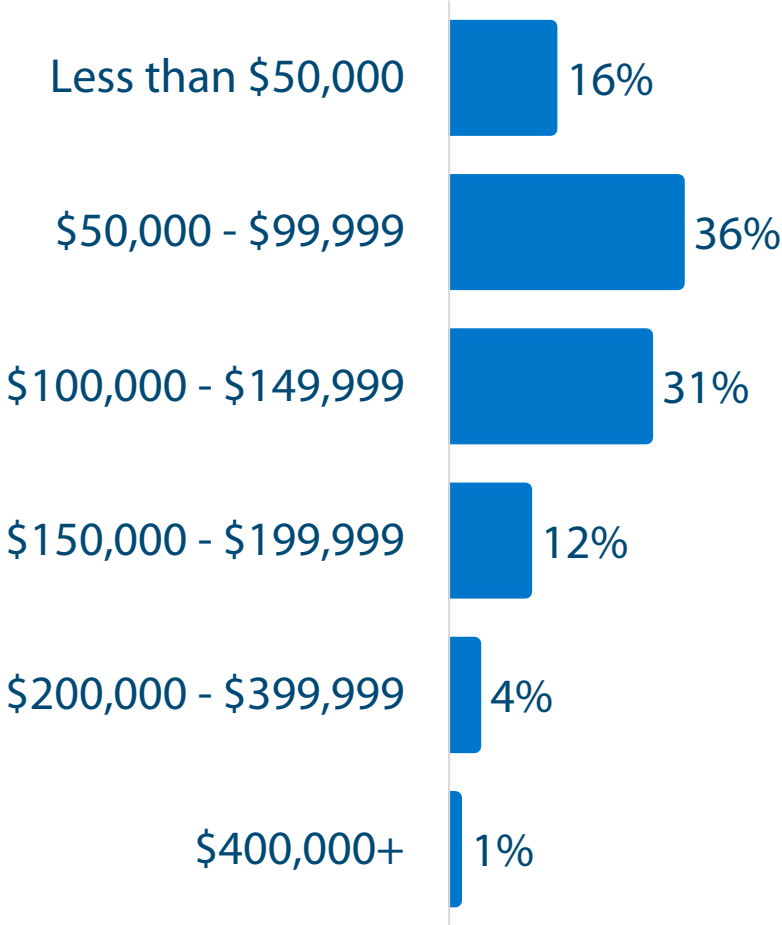
*Children are considered people under the age of 20

» The median **age**¹ of visitors surveyed was **44** (44 in 2025)

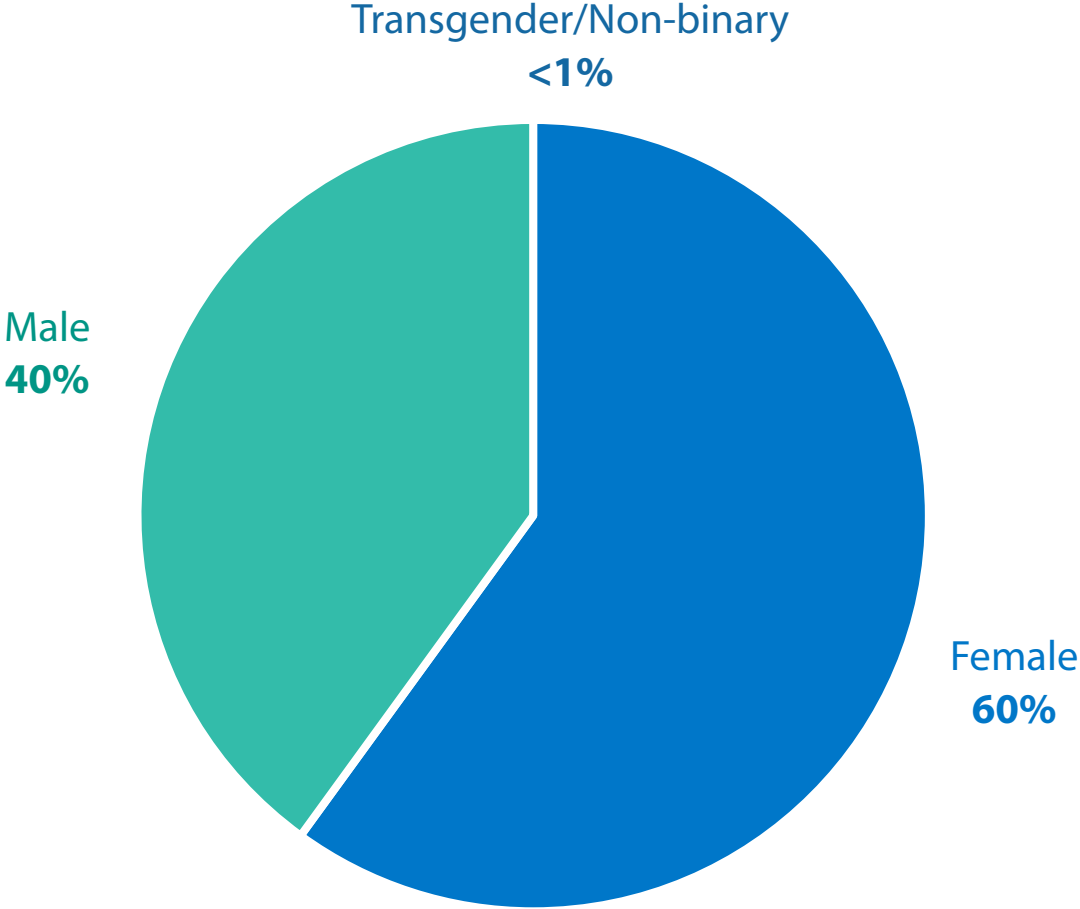


¹Age of the member of the travel party surveyed.
The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

- » Visitors to the Pensacola area had a **median household income** of **\$97,200** per year (\$89,300 in 2025)
- » **17%** of visitors had household incomes **over \$150,000**

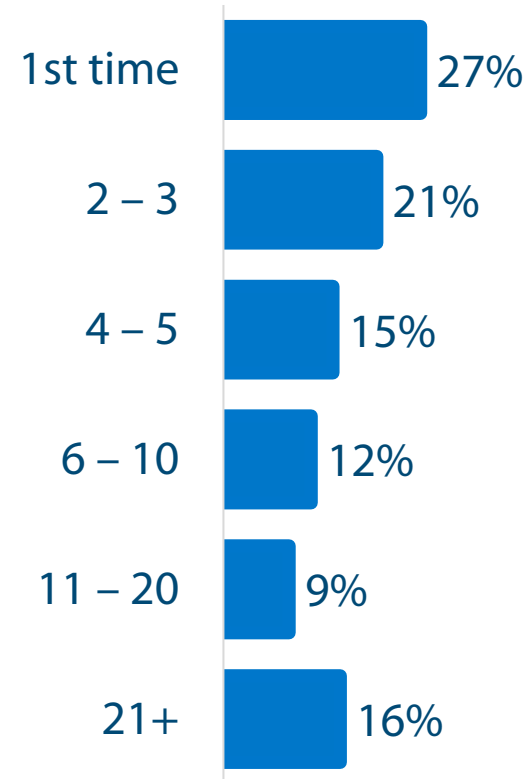


» 60% of visitors surveyed identified as female¹ (61% in 2025)



¹Gender of the member of the travel party surveyed.
The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

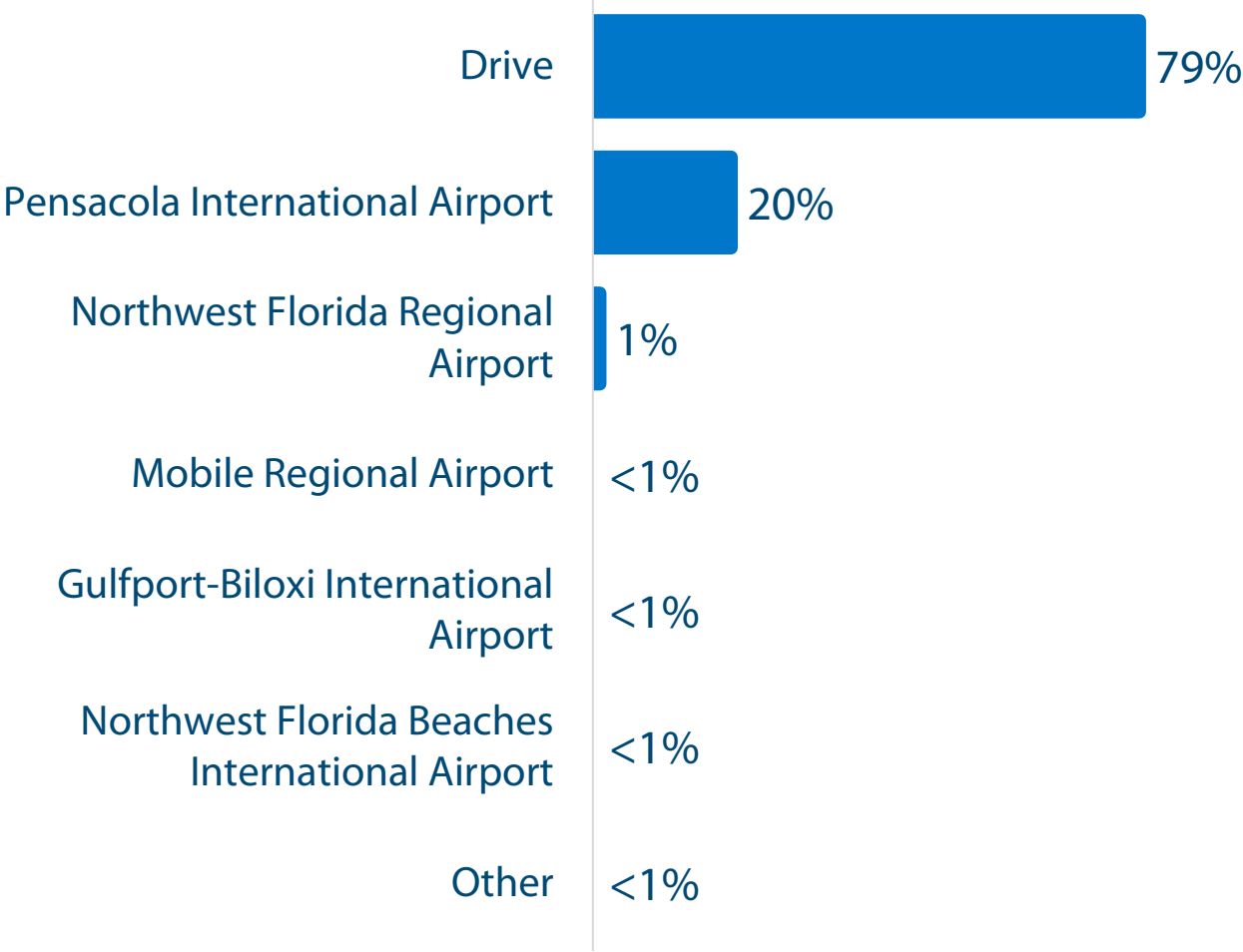
- » **Over 1 in 4** visitors were visiting the Pensacola area for the **first time** (23% in 2025)
- » **25%** of visitors are loyalists, having **visited the Pensacola area over 10 times** (32% in 2025)



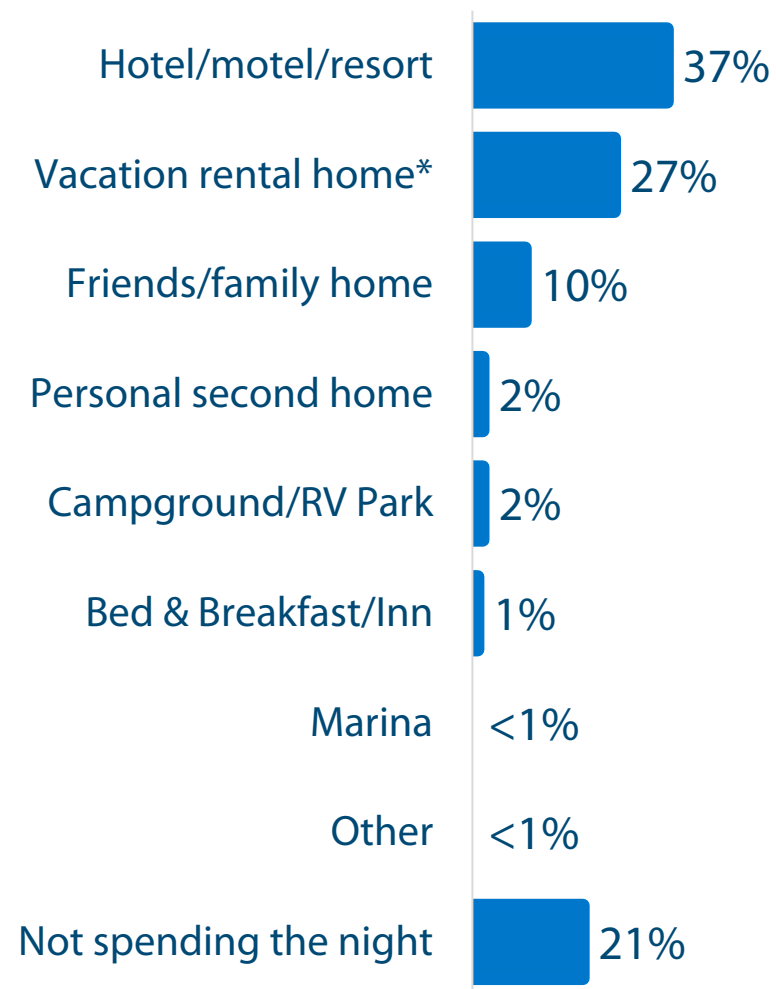
VISITOR JOURNEY: TRIP EXPERIENCE



- » **Nearly 4 in 5** visitors **drove** to the Pensacola area for their trip (80% in 2025)
- » **20%** of visitors used the **Pensacola International Airport** (19% in 2025)



- » **Nearly 2 in 5** visitors stayed overnight in a **hotel, motel, or resort** (39% in 2025)
- » The typical visitor¹ stayed **3.9 nights** in Pensacola area (3.9 in 2025)
- » Visitors staying in **paid accommodations**² stayed an average of **4.4 nights** in the Pensacola area (4.5 in 2025)

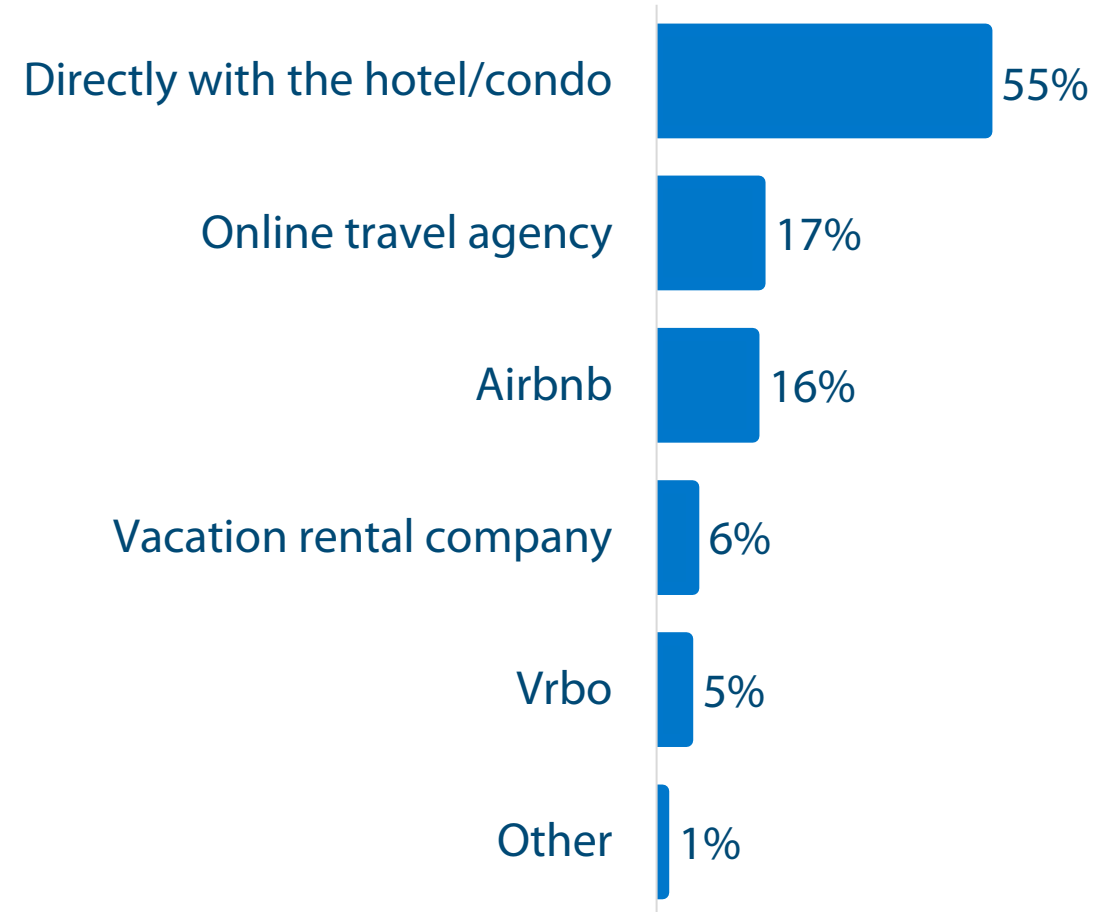


¹ Visitors staying in paid accommodations, nonpaid accommodations, and day trippers.

² Visitors staying in a hotel/motel/resort, rental condo/vacation rental home, or campground/RV park.

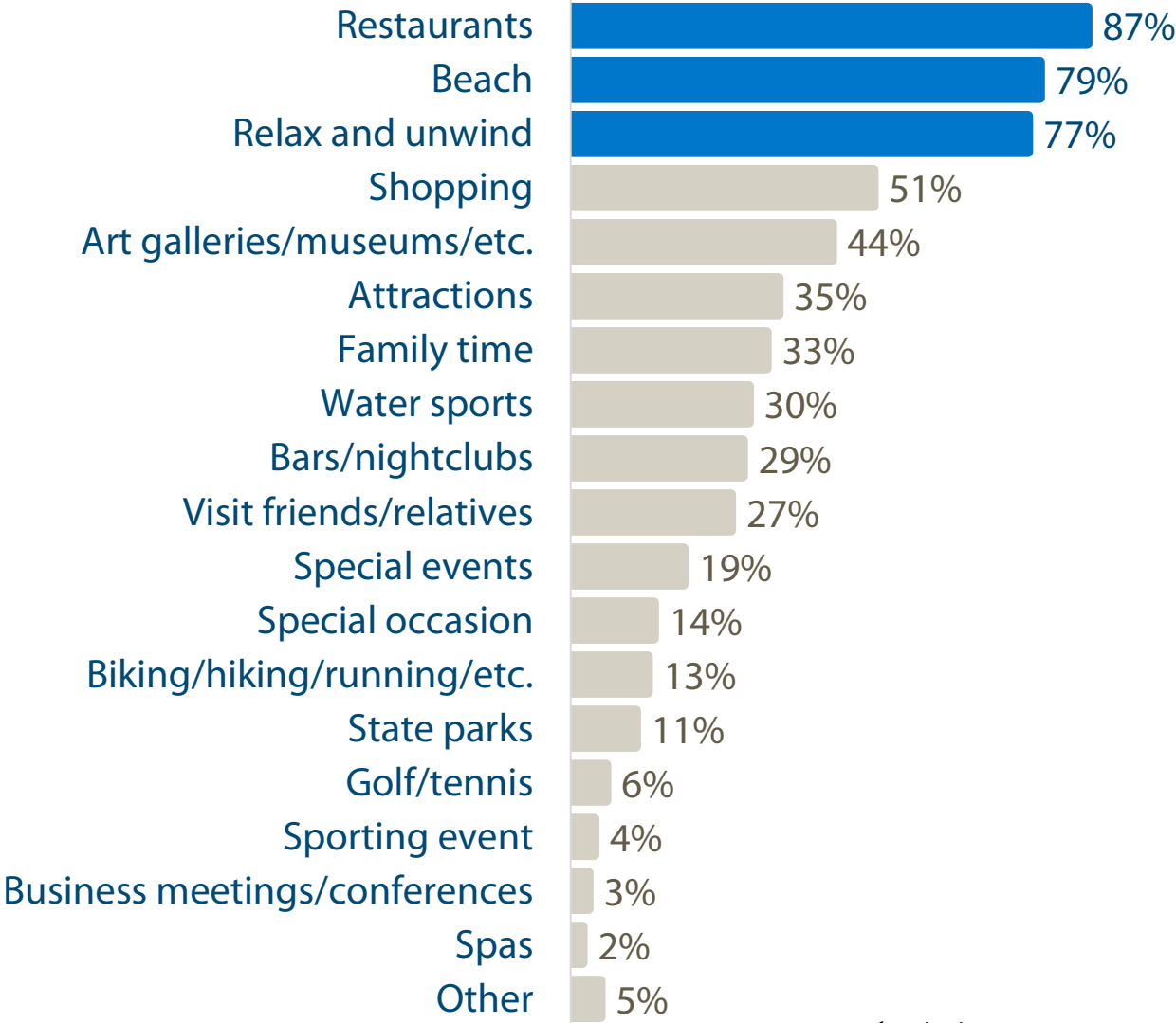
*Includes Airbnb, Vrbo, etc.

- » **Over half** of visitors booked their trip to the Pensacola area **directly with the hotel/condo** (50% in 2025)
- » **1 in 6** visitors booked through an **online travel agency** (19% in 2025) or **Airbnb** (20% in 2025)



Top activities enjoyed by visitors this quarter include:

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

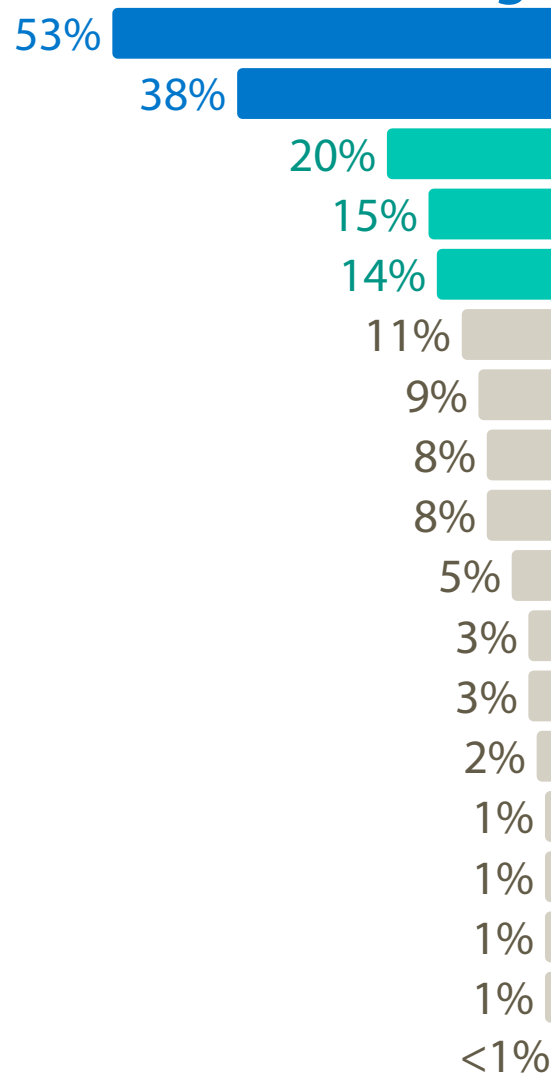


¹ Multiple responses permitted.

ACTIVITIES V. REASON FOR VISIT

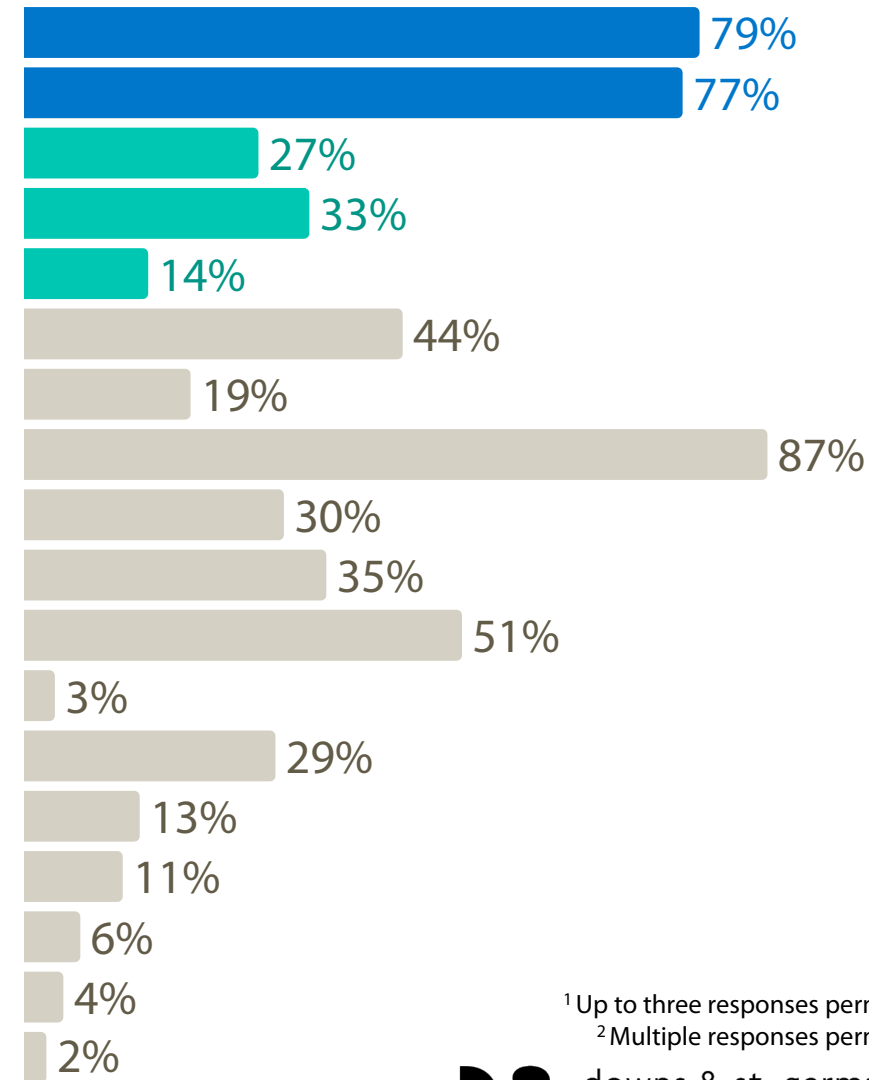
APRIL TO JUNE 2026

Reason for Visiting¹



Beach
Relax and unwind
Visit friends/relatives
Family time
Special occasion
Art galleries, museums, etc.
Special events
Restaurants
Water sports
Attractions
Shopping
Business meetings/conferences
Bars/nightclubs
Biking, hiking, running, etc.
State parks
Golf/tennis
Sporting event
Spas

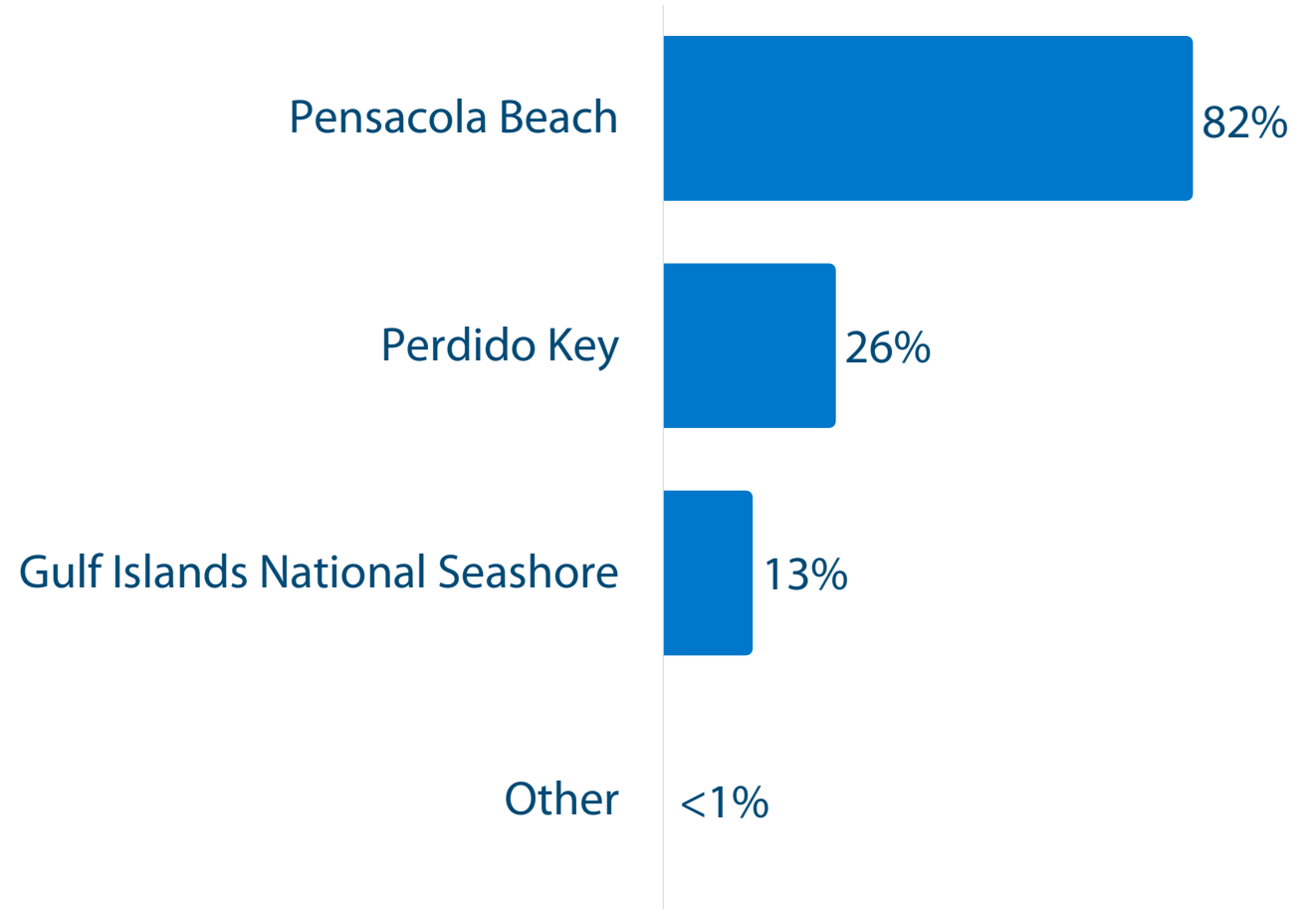
Visitor Activities²



¹ Up to three responses permitted.

² Multiple responses permitted.

- » **Over 4 in 5** visitors who visited the beach went to **Pensacola Beach**
- » **Over 1 in 4** visitors who visited the beach went to **Perdido Key**

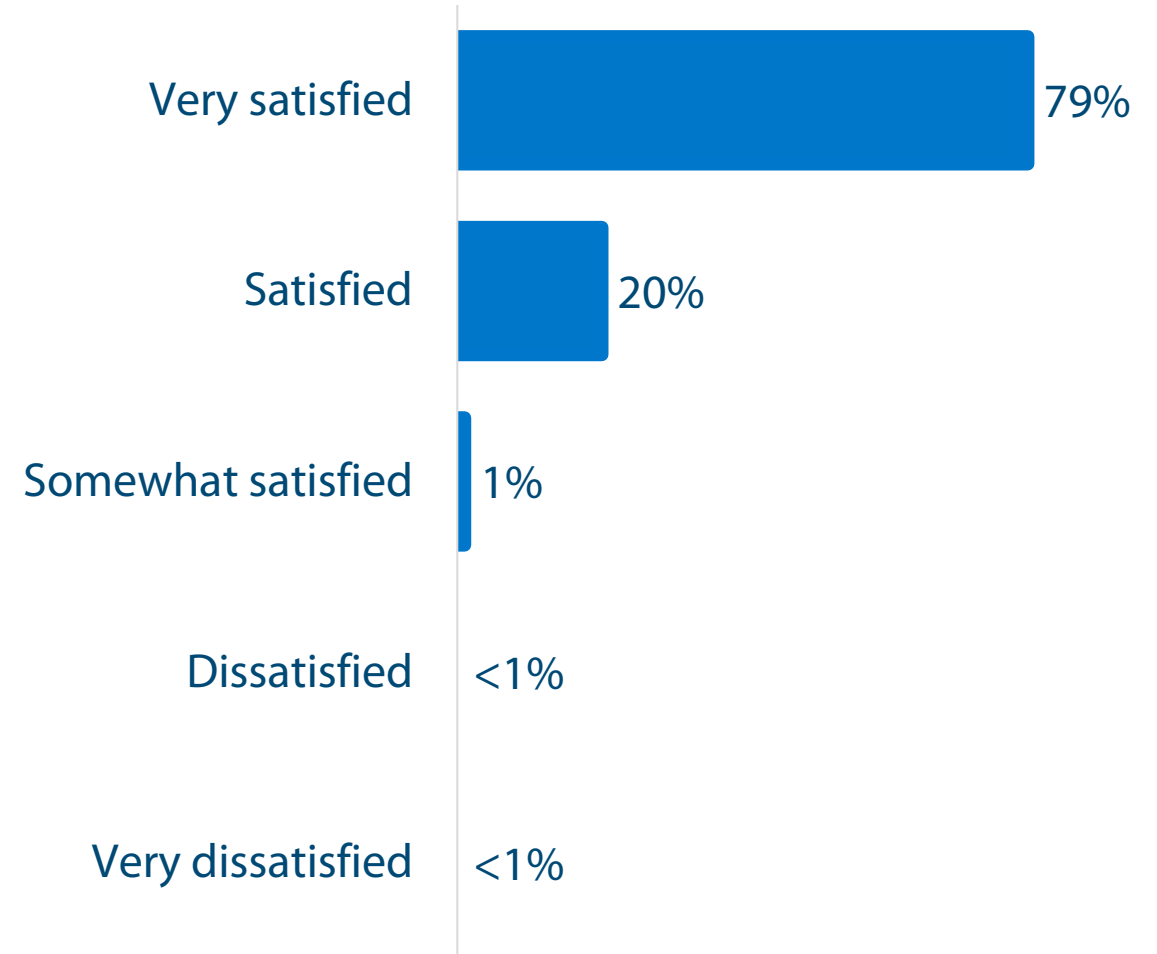


¹ Multiple responses permitted.

VISITOR JOURNEY: POST TRIP EVALUATION

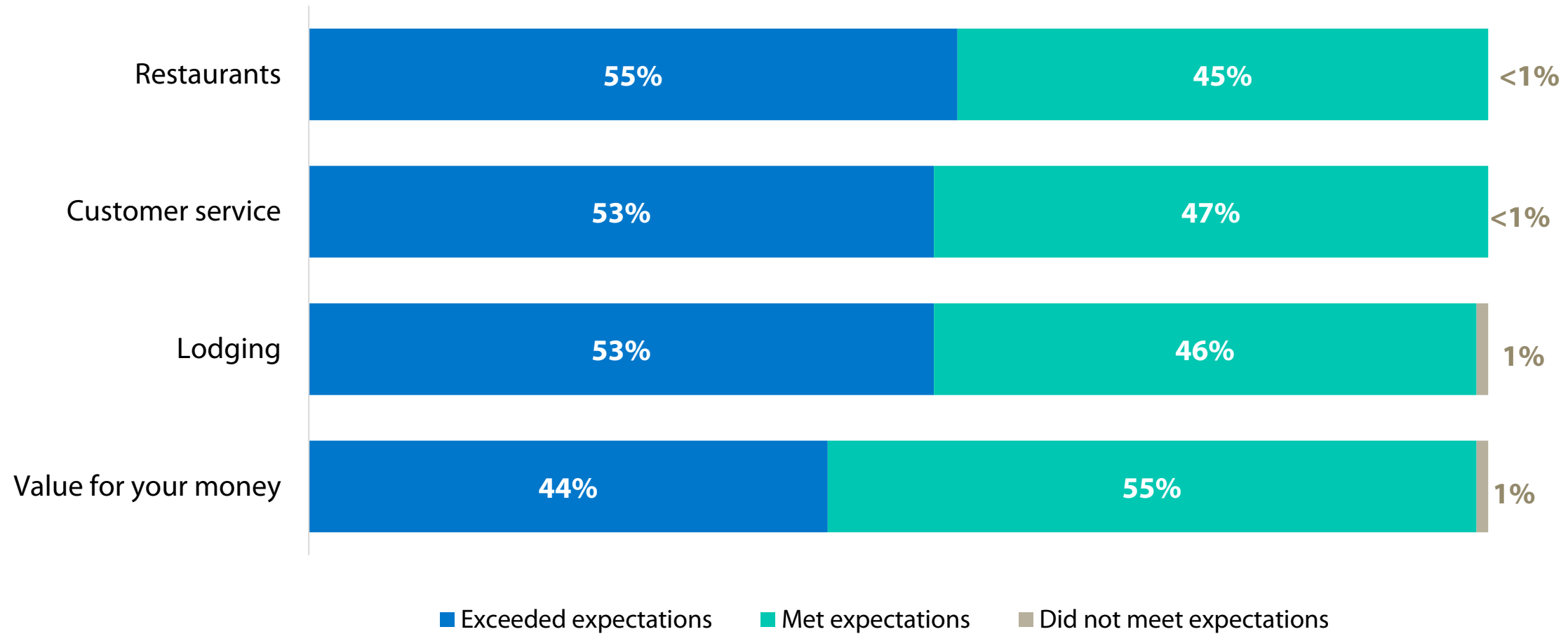


- » **Over 3 in 4** visitors were **very satisfied** with their trip to the Pensacola area (**79% in 2025**)
- » Those who said somewhat satisfied, dissatisfied, or very dissatisfied were asked what features they liked least about the area, which included: traffic, high prices, weather, and insects

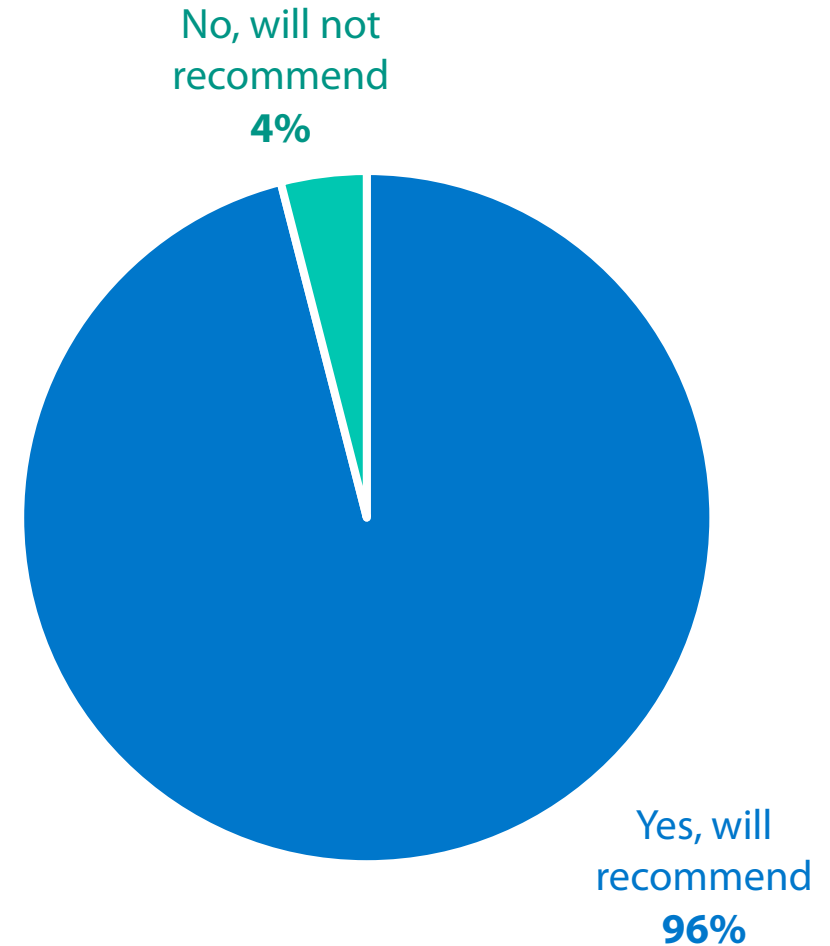


SATISFACTION RATINGS

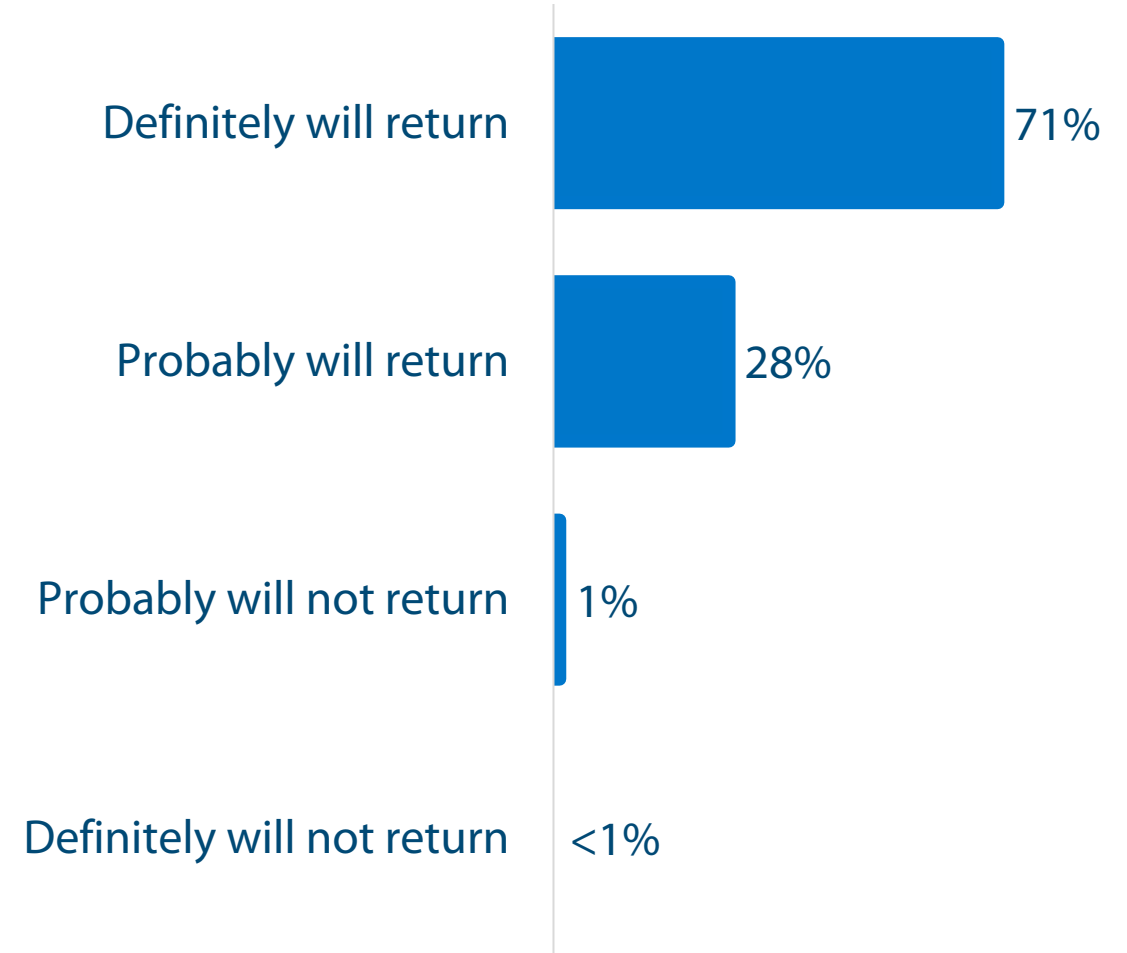
APRIL TO JUNE 2026



» **Almost all** visitors would recommend the Pensacola area to others (96% in 2025)



» **Over 7 in 10** visitors will **definitely return** to the Pensacola area (72% in 2025)



VISIT PENSACOLA

VISITOR TRACKING STUDY

APRIL-JUNE 2026

Downs & St. Germain Research
contact@dsg-research.com
850-906-3111 | www.dsg-research.com

