

VISIT PENSACOLA

Visitor Tracking Study
April – June 2023



STUDY OBJECTIVES: VISITOR JOURNEY



EXECUTIVE SUMMARY



QUARTERLY SNAPSHOT

April – June 2023

- » In April to June 2023 lodging **occupancy** was down -4.9%, **ADR** was down -2.0%, resulting in a **RevPAR** that was down -6.7%
- » While the number of visitors increased there was higher percentage of day trippers compared to 2022 (+1.2% points)
- » Compared to 2022, there were fewer visitors coming to the area for the **first time** (-5% point) and more visitors who had previously visited **more than 10 times** (+4% points)
- » **Customer service** (+10%), **Lodging** (+9%), **Restaurants** (+8%), and **Value of money** (+7%) were all up in **Exceeded Expectations** from 2022



781,300

TOTAL
VISITORS

↑ 2.3%



674,543

ROOM
NIGHTS

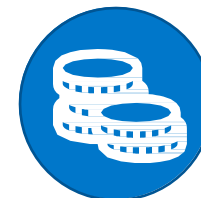
↓ 2.1%



\$397,015,500

DIRECT
SPENDING

↑ 3.7%



\$5,971,565

TOURISM
DEVELOPMENT TAX

↓ 1.4%

vs. 2022

VISITOR JOURNEY: ECONOMIC IMPACT



TOURISM SNAPSHOT: METRICS

	April - June 2022	April - June 2023	% Δ
Occupancy ¹	73.4%	69.8%	- 4.9%
ADR ¹	\$197.82	\$193.93	- 2.0%
RevPAR	\$145.22	\$135.44	- 6.7%
Room Nights	688,757	674,543	- 2.1%
TDT ²	\$6,053,844	\$5,971,565	- 1.4%

	April - June 2022	April - June 2023	% Δ
Visitors ³	763,600	781,300	+ 2.3%
Direct Spending	\$382,763,500	\$396,895,100	+ 3.7%

¹ Sources: Key Data and Smith Travel Research.

² Source: Clerk & Comptroller Escambia County. June collections were estimated as they were not available at the time this report was created.

³ Despite the decreased in occupancy there were more visitors coming to the area for the day and larger travel party sizes of visitor staying in paid accommodations, resulting in an increase in the number of visitors.

VISITOR JOURNEY: PRE-VISIT



TRIP PLANNING CYCLE

- » Trips to Pensacola have slightly shorter planning windows, as over **half** visitors planned their trip to the Pensacola area **a month or less in advance** (49% in 2022)
- » Average trip planning cycle began **58 days** before the trip (60 days in 2022)



TOP TRIP PLANNING SOURCES¹



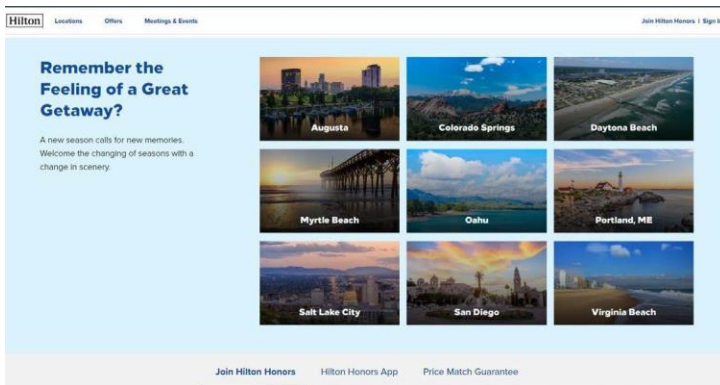
68% Search sites (Google, etc.)
(69% in 2022)



32% Friends/family
(28% in 2022)



28% Vacation rental websites
(32% in 2022)



27% Hotel websites/apps
(32% in 2022)

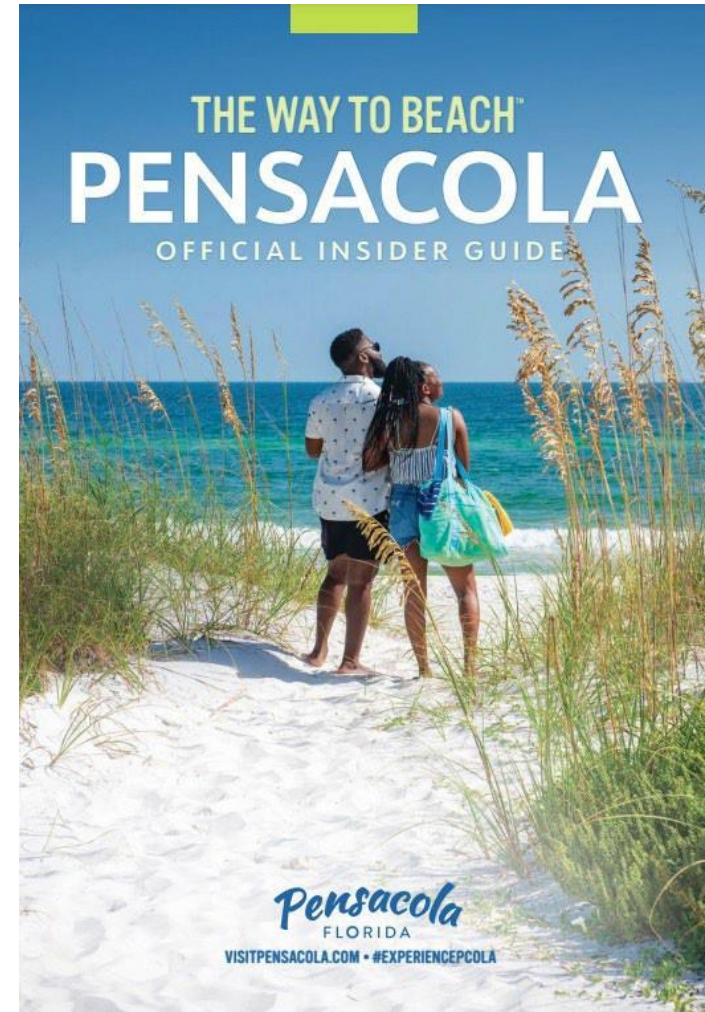


26% Personal social media
(20% in 2022)

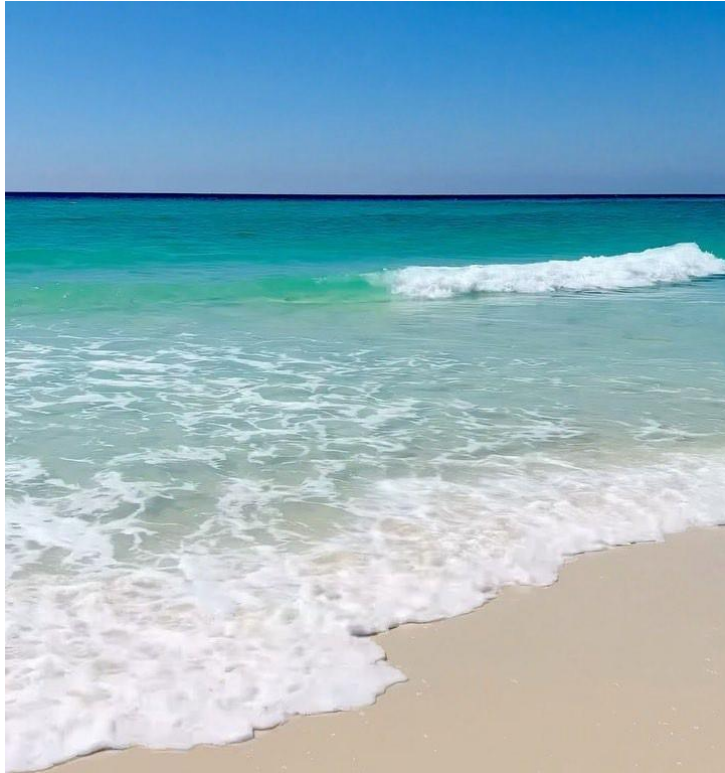
¹ Multiple responses permitted.

VISITOR GUIDE

- » **19%** of visitors requested or viewed the Pensacola Visitors Guide (**23% in 2022**)
- » Most visitors who use the Visitor Guide viewed it **online**



TOP REASONS FOR VISITING¹



48% Beach
(47% in 2022)



41% Relax and unwind
(47% in 2022)



25% Visit friends/relatives
(22% in 2022)

¹ Multiple responses permitted.

PRE-TRIP EXPOSURE TO ADVERTISING

- » **23%** of visitors have recently noticed advertising about the Pensacola area (**21% in 2022**)
- » This information influenced **11%** of all visitors to visit the Pensacola area (**11% in 2022**)



SOURCES OF ADVERTISING EXPOSURE¹

Base: 23% of visitors who noticed advertising



41% Personal social media
(24% in 2022)



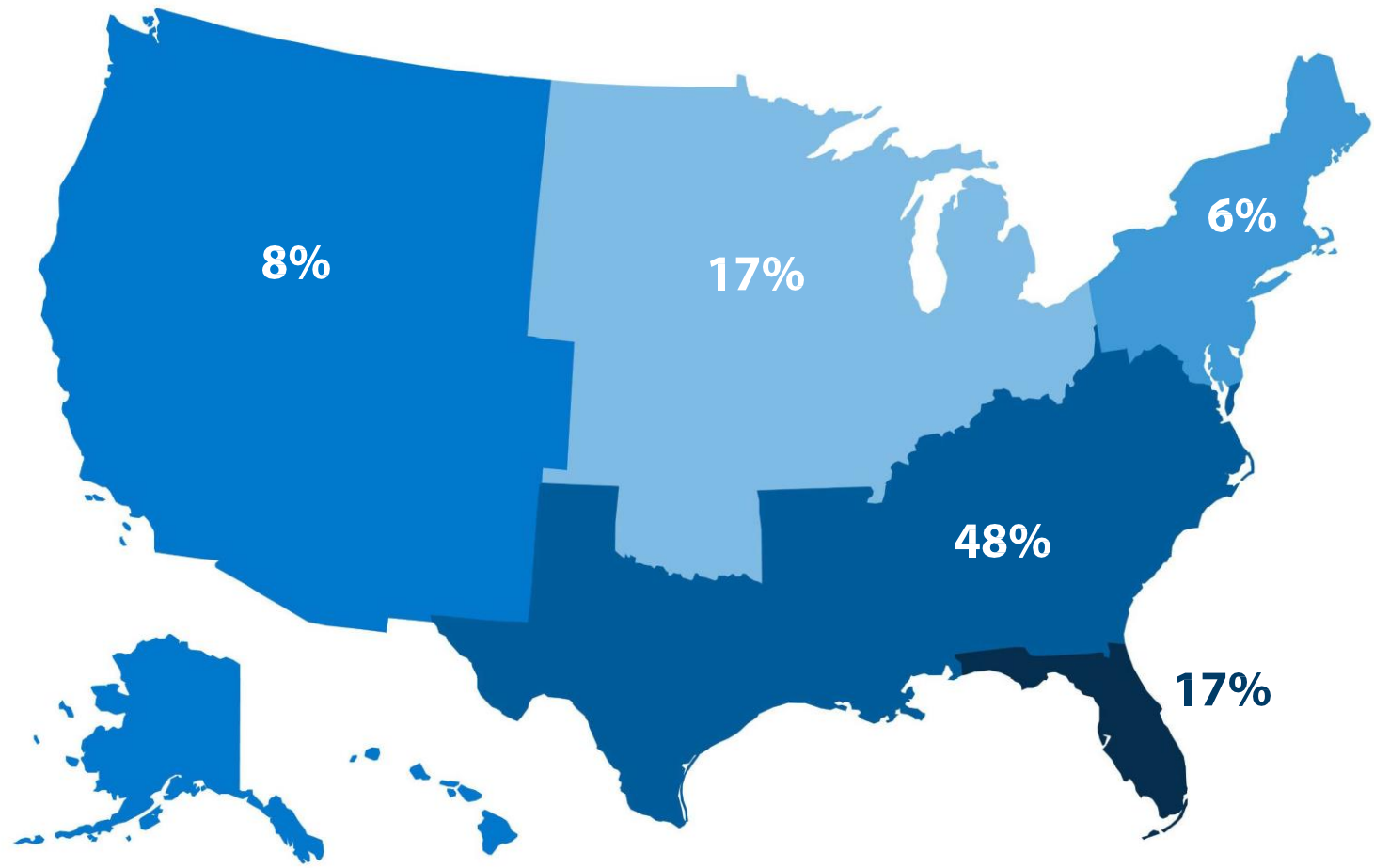
28% Television
(33% in 2022)

VISITOR JOURNEY: TRAVEL PARTY PROFILE



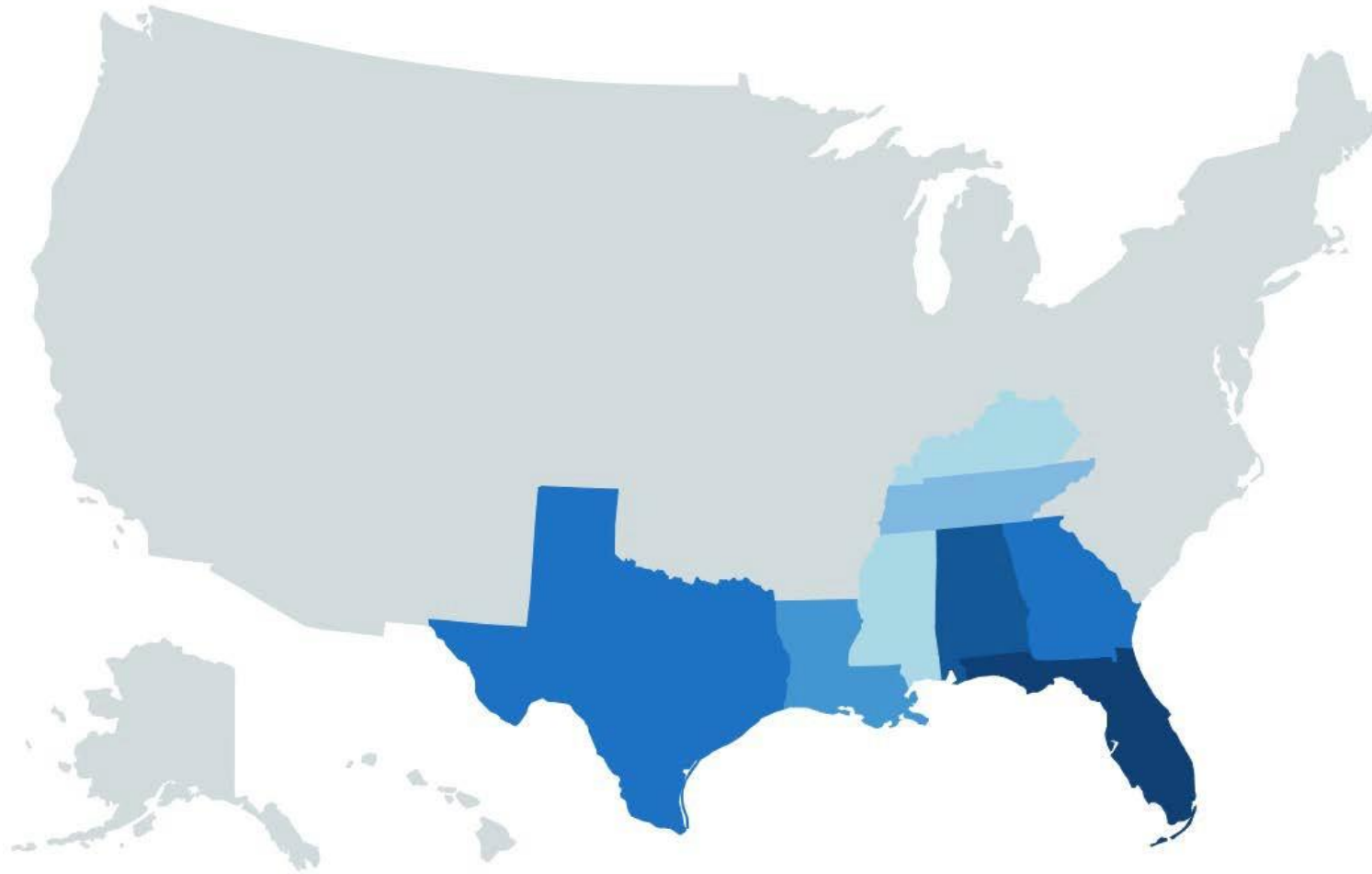
REGIONS OF ORIGIN

The southeast including Florida account for nearly 2 in 3 visitors



4% of visitors traveled to Pensacola from outside of the U.S.

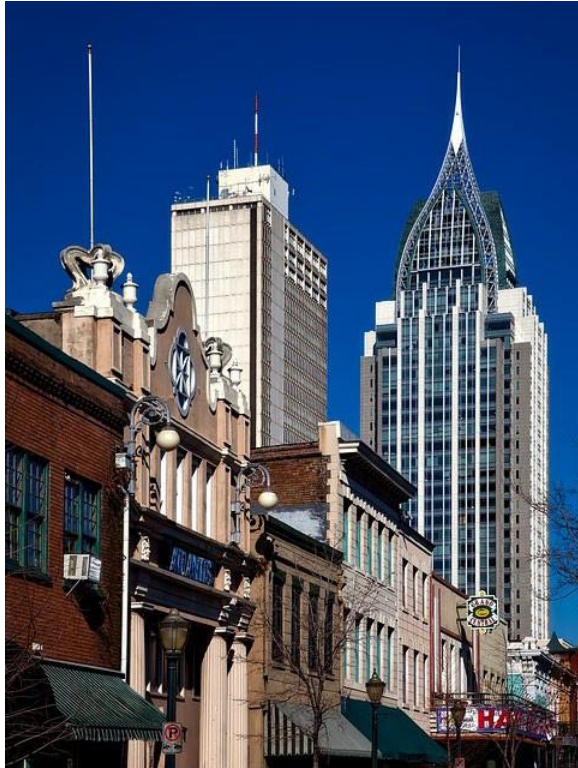
TOP STATES OF ORIGIN



3 in 5 visitors reside in 8 states

- 17% Florida
- 13% Alabama
- 7% Texas
- 7% Georgia
- 6% Louisiana
- 5% Tennessee
- 3% Mississippi
- 3% Kentucky

TOP MARKETS OF ORIGIN



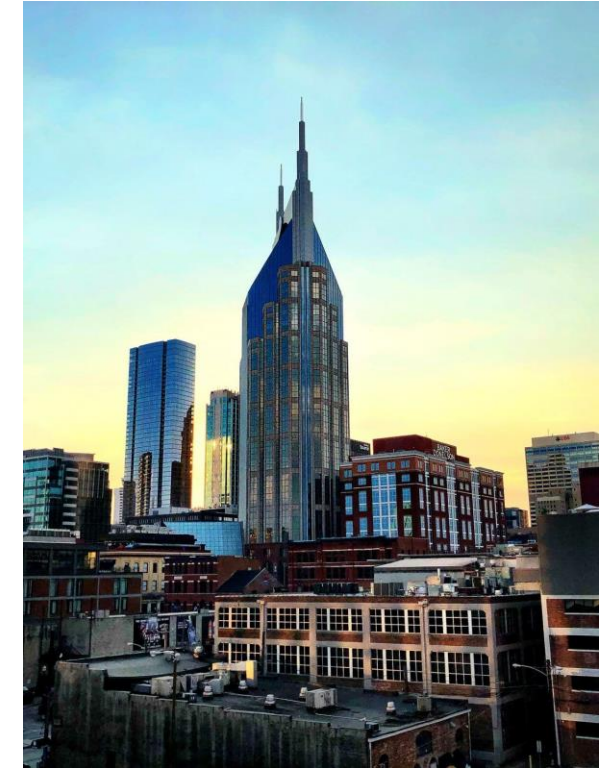
18% Mobile¹
(13% in 2022)



6% Atlanta
(5% in 2022)



3% New Orleans
(3% in 2022)



3% Nashville
(3% in 2022)

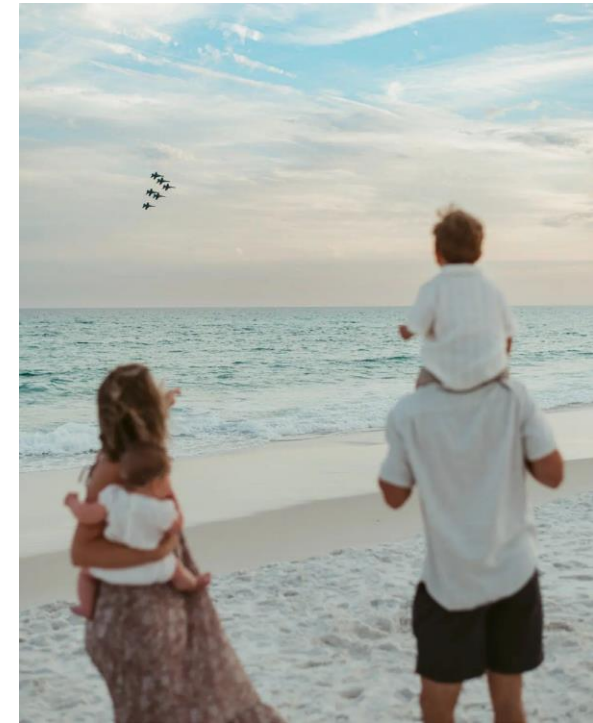
¹ Mobile DMA spans across Florida, Alabama, and Mississippi. Data is weighted with Arrivalist to determining top markets.

TRAVEL PARTIES

- » The typical visitor traveled in a party composed of **3.3** people (3.3 in 2022)



- » **40%** traveled with at least one person under the age of 20 (40% in 2022)



VISITOR PROFILE

- » The typical Pensacola area Visitor:
 - » Is **43** years old (43 in 2022)
 - » Has a household income of **\$86,300** per year (\$85,400 in 2022)
 - » Female¹ **61%** (57% in 2022)



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

NEW & RETURNING VISITORS

- » **3 in 10 visitors** were first time visitors to Pensacola area (35% in 2022)
- » **25%** of visitors were loyalists, having visited over 10 times (30% in 2022)



VISITOR JOURNEY: TRIP EXPERIENCE



TRANSPORTATION

- » **82%** of visitors drove to the Pensacola area (81% in 2022)
- » **16%** of **all** visitors flew to Pensacola through the Pensacola International Airport (17% in 2022)



OVERNIGHT VISITORS

- » **Over 1 in 3** visitors stayed overnight in a **hotel, motel, or resort** (42% in 2022)
- » Typical visitors spent **4.8** nights in the Pensacola area (4.7 in 2022)



TOP ACCOMMODATIONS



36% Hotel/Motel/Resort
(42% in 2022)



26% Vacation rental home*
(24% in 2022)



20% Day tripper
(19% in 2022)



10% Friends/family home
(9% in 2022)

*Includes Airbnb, VRBO, HomeAway, etc.

TOP ACTIVITIES DURING VISIT¹



82% Restaurants
(85% in 2022)



77% Relax and unwind
(79% in 2022)



75% Beach
(72% in 2022)

TRAVEL PARTY SPENDING

- » Travel parties spent **\$394** per day and **\$1,670** during their trip (\$407 per day and \$1,695 per trip in 2022)



VISITOR JOURNEY: POST-TRIP



VISITOR SATISFACTION

- » **98%** of visitors were **satisfied** with their trip to the Pensacola area (98% in 2022) – **74%** were **very satisfied** (81% in 2022)
- » **91%** of visitors would **recommend** the area to others (91% in 2022)
- » **98%** of visitors would **return** to the Pensacola area (98% in 2022) – **71%** would **definitely return** (73% in 2022)



SATISFACTION RATINGS

- » Nearly **2 in 3** visitors expressed that **lodging** (56% in 2022), **restaurants** (57% in 2022), and **customer service** (56% in 2022) exceeded expectations
- » Over **half** of visitors expressed **value for their money** (44% in 2022), exceeded expectations



AREA DESCRIPTIONS*



"Interesting and diverse atmosphere with nice locals and great restaurants."



"Gorgeous beaches that will make you fall in love. Paradise."



"Very nice beach town with lots of family-oriented things to do as well as night time fun for adults. Lots of historical places to visit."



*Open-ended responses. Multiple responses permitted.

QUESTIONS?

Visitor Tracking Study April – June 2023

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