

VISIT PENSACOLA

Visitor Tracking Study

FY2023

October 2022 – September 2023



STUDY OBJECTIVES: VISITOR JOURNEY



- Planning cycle
- Planning sources
- Reasons for visiting
- Exposure to destination messaging

- Visitor origin
- Party size
- Party composition
- Demographics
- Number of visits to the area

- Mode of transportation
- Accommodations
- Booking
- Length of stay
- Activities in destination
- Visitor spending

- Satisfaction with the Pensacola area
- Likelihood of returning
- Evaluation of destination attributes
- Painting a picture for others

- Number of visitors
- Expenditures
- Room nights generated
- Occupancy, ADR, RevPAR

EXECUTIVE SUMMARY



ANNUAL SNAPSHOT FY2023

- 1** **Tourism metrics dampened slightly** compared to FY22, however, visitation, direct spending, economic impact, and TDT **remained relatively flat for the past three years**
- 3** **Customer service (+8% points), Lodging (+6% points), Restaurants (+7% points), and Value for money (+3% points)** were all up in Exceeded Expectations from FY2022.
- 5** Among visitors who recently noticed advertising, more noticed this information on **personal social media (+8% points)** than in FY2022.

- 2** **Lodging occupancy was down -9.1%, and ADR was down -3.8%, resulting in a RevPAR that was down -12.5% from FY2022.** Accommodation units saw a 5% increase this year, with a typical lag in demand catching up to the increase in supply.
- 4** **2 of the top 4 advertising recall sources** are from **Visit Pensacola content** for the third year in a row.
- 6** More visitors came to the area for **family time (+5% points)** and participated in **family time activities (+6% points)** compared to FY2022



2,505,200

TOTAL VISITORS

↓ -0.2%



2,399,900

ROOM NIGHTS

↓ -2.5%



\$1,317,318,200

DIRECT SPENDING

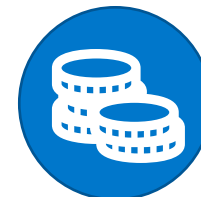
↑ 0.6%



\$2,028,670,100

ECONOMIC IMPACT

↑ 0.9%



\$21,582,336

TOURISM DEVELOPMENT TAX

↓ 1.1%

VISITOR JOURNEY: ECONOMIC IMPACT



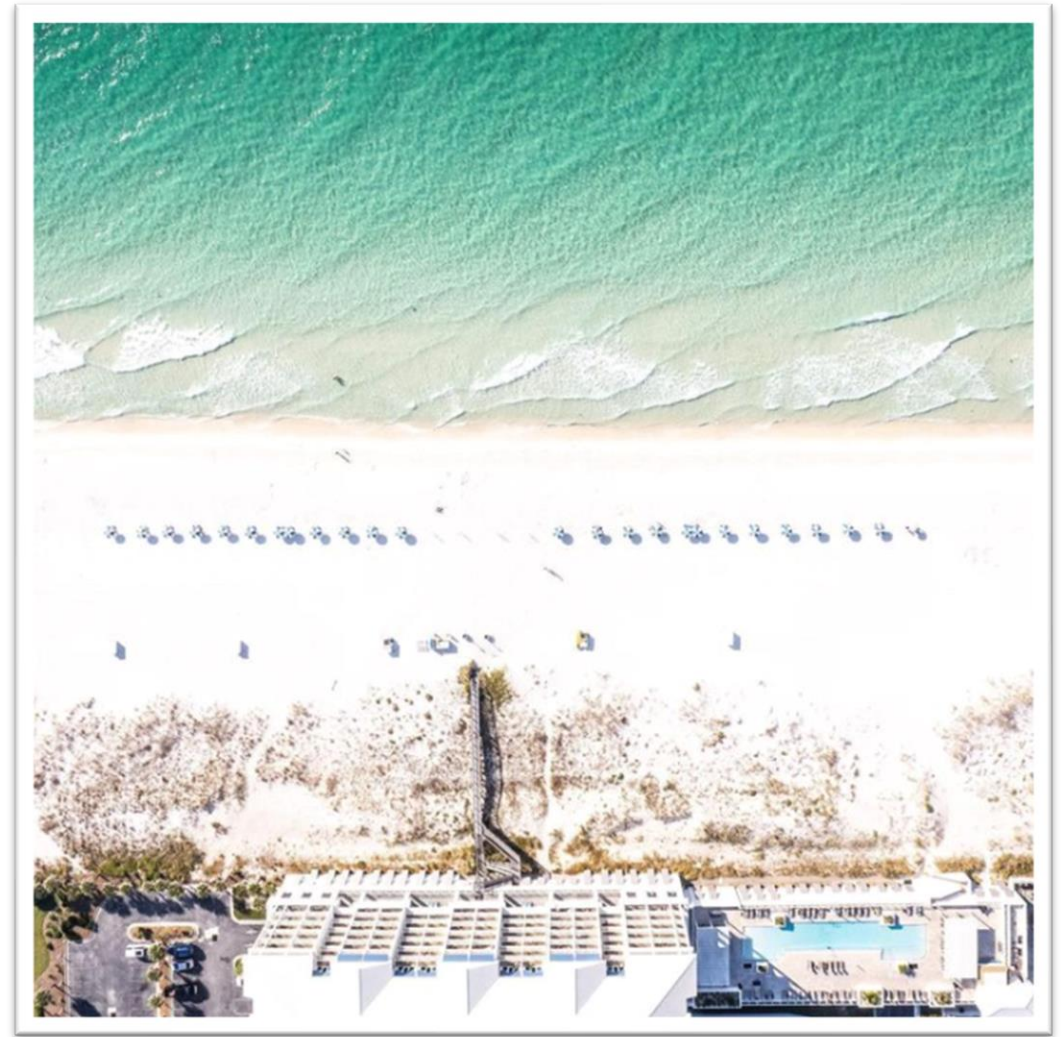
DIRECT SPENDING

Visitors to the Pensacola area spent

\$1,317,318,200

in the Pensacola area on accommodations, restaurants, groceries, transportation, attractions, entertainment, and shopping

An increase of **+0.6%** from FY2022



ECONOMIC IMPACT

Visitor spending generated a total economic impact of

\$2,028,670,100

in the Pensacola area

An increase of **+0.9%** from FY2022



VISITORS

Pensacola attracted

2,505,200

Visitors

A decrease of **-0.2%** from FY2022



ROOM NIGHTS

Pensacola visitors generated

2,399,900

room nights in paid accommodations

A decrease of **-2.5%** from FY2022



ACCOMODATION METRICS

FY23 experienced a decrease in occupancy, yet there was also a 4.9% increase in available units¹, demonstrating growth.

Occupancy

61.8%

- 9.1% from FY22

Average Daily Rate

\$161.01

- 3.8% from FY22

Revenue per Available Room

\$99.54

- 12.5% from FY22

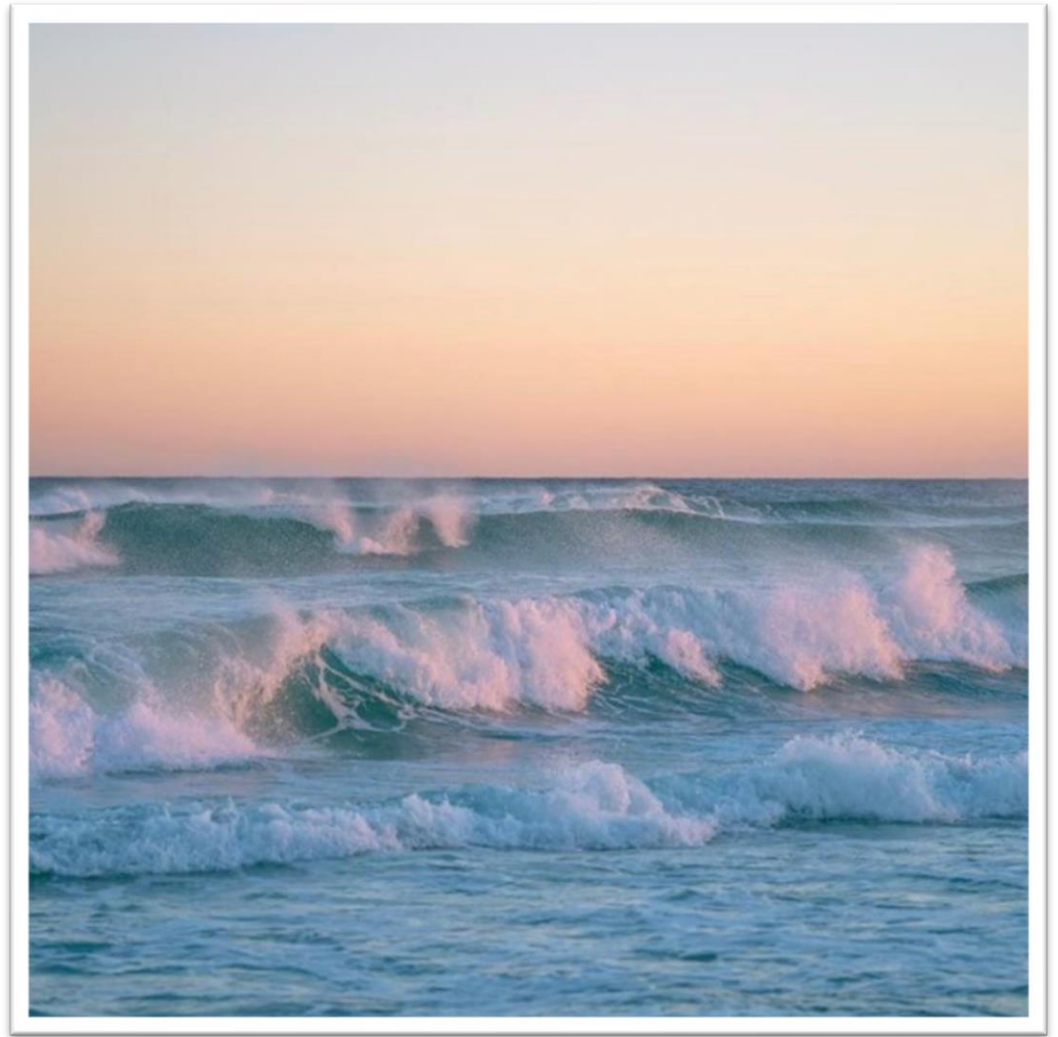
Tourism in the Pensacola area supported

20,600

local jobs in FY2023, generating

\$676,180,100

in wages and salaries



TOURISM DEVELOPMENT TAX

Lodging expenditures by visitors to the Pensacola area in FY2023 generated

\$21,582,336

in TDT collected

A decrease of **-1.1%** from FY2022



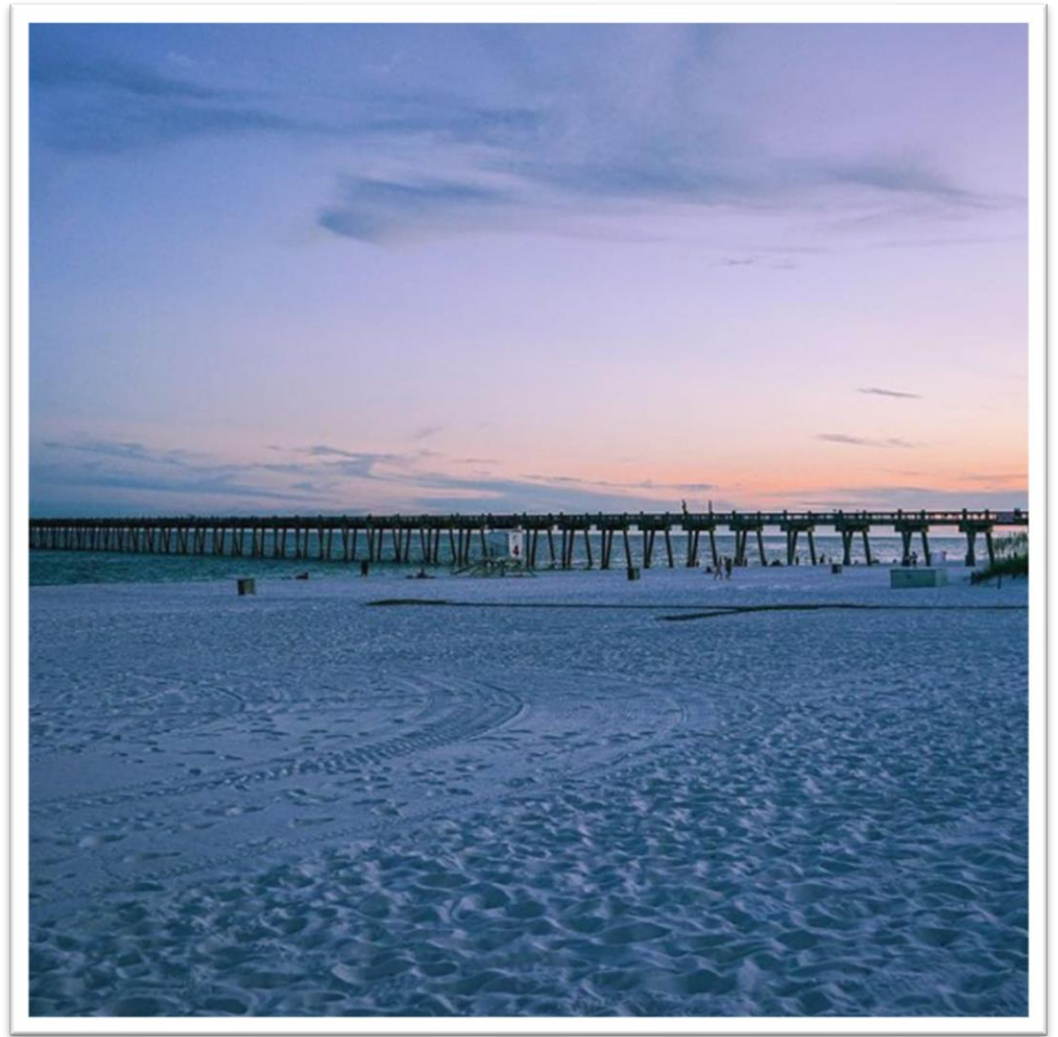
NET TAX BENEFIT¹

Visitors to the Pensacola area in FY2023
generated a net tax benefit of

\$59,051,714

in tax revenue to Escambia County
government

¹ Visitors contribute revenue to Escambia County government via taxes and user fees. Visitors, by using county services and infrastructure, cost Escambia County government money. The net impact of local government revenue for visitors less the cost of servicing visitors is \$59,051,714.

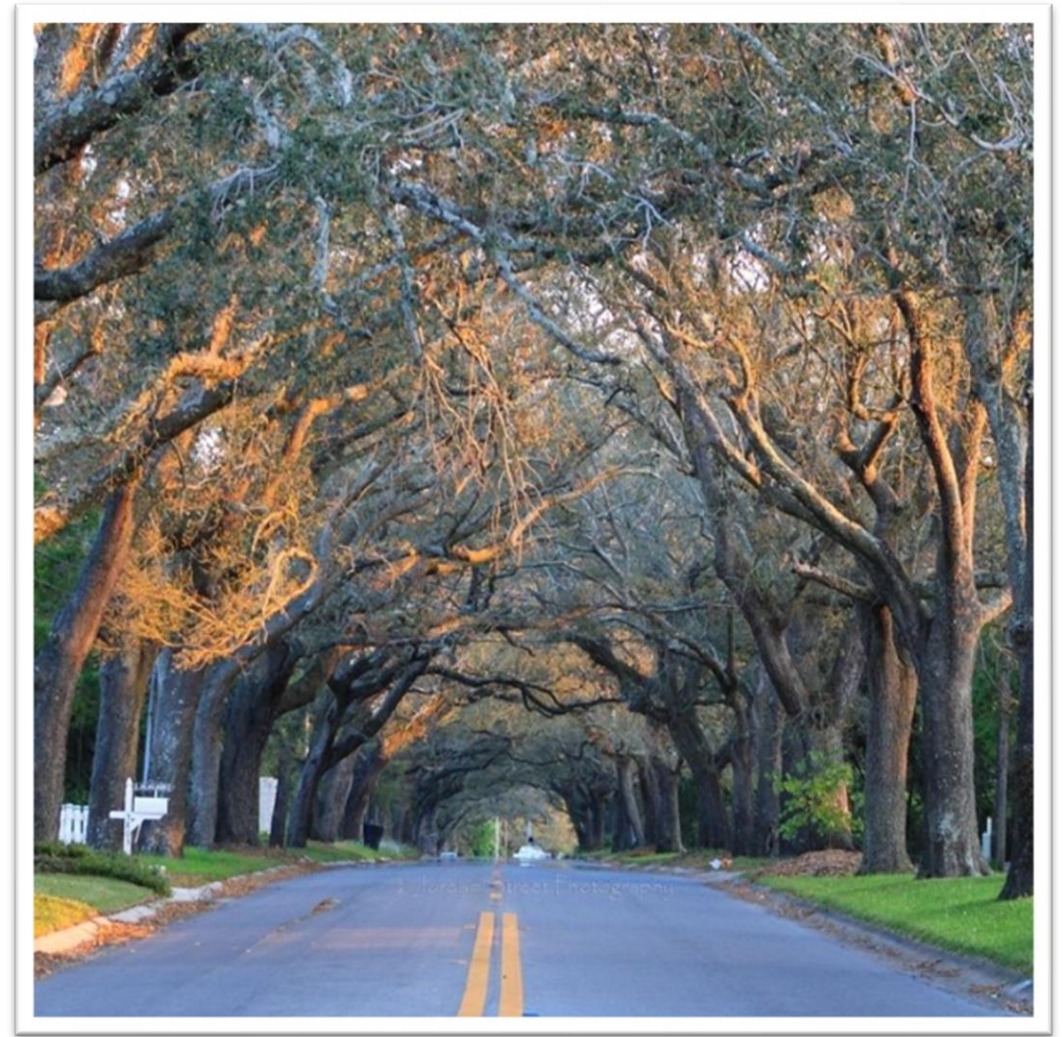


VISITORS SUPPORT JOBS

An additional Pensacola area job is supported by every

122

visitors



HOUSEHOLD SAVINGS

Visitors to the Pensacola area save local residents

\$508

in local taxes per household each year



VISITOR JOURNEY: PRE-VISIT



TRIP PLANNING CYCLE

- » Trips to Pensacola have short planning windows, as over **half** of visitors planned their trip to the Pensacola area **a month or less in advance** (54% in 2022)
- » Average trip planning cycle began **57 days** before the trip (59 days in 2022)



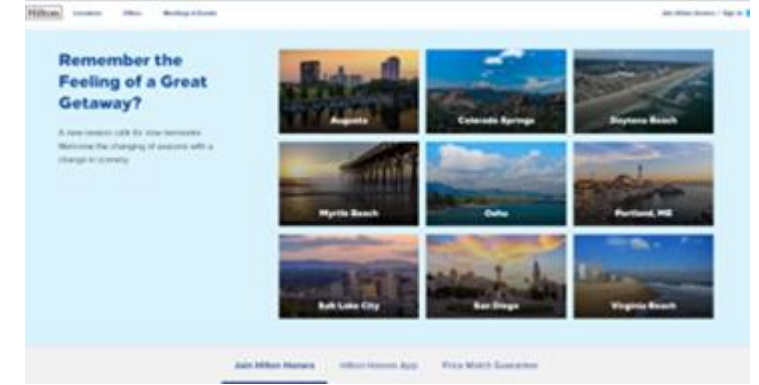
TOP TRIP PLANNING SOURCES¹



66% Search sites (Google, etc.)
(67% in 2022)



35% Friends/family
(36% in 2022)



28% Hotel websites/apps
(31% in 2022)



27% Vacation rental websites
(25% in 2022)



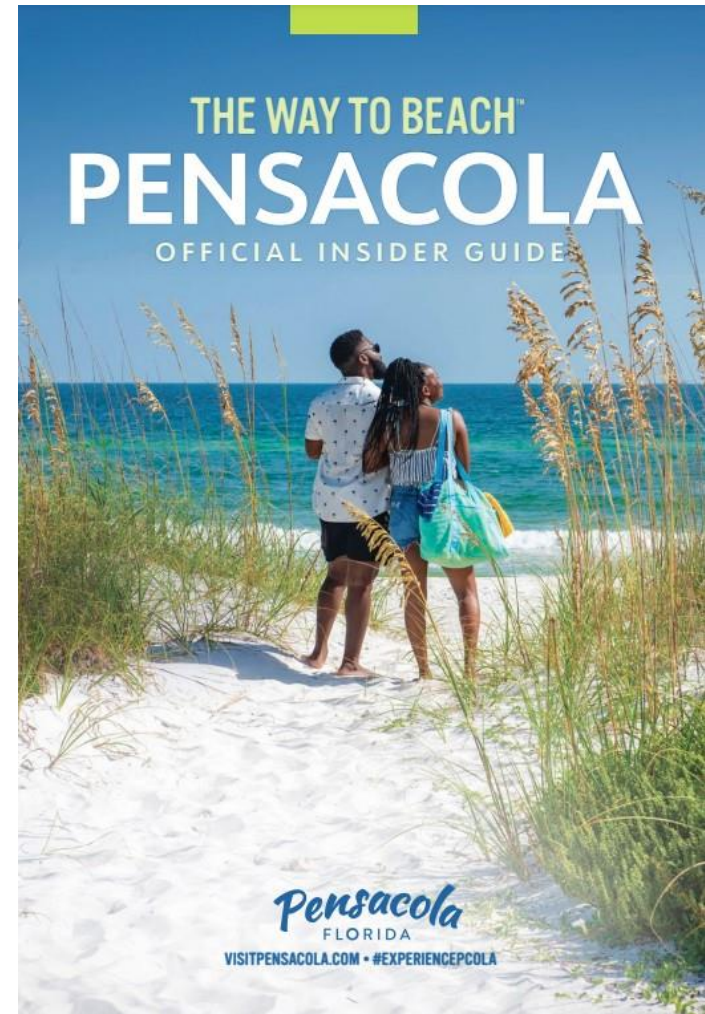
22% Airline websites/app
(24% in 2022)



22% Personal social media
(19% in 2022)

VISITOR GUIDE

- » **18%** of visitors requested or viewed the Pensacola Visitors Guide (**22% in 2022**)
- » Most visitors who use the Visitor Guide viewed it **online**



TOP REASONS FOR VISITING¹



40% Beach
(37% in 2022)



37% Relax and unwind
(40% in 2022)



24% Visit friends/relatives
(19% in 2022)

¹Three responses permitted.

PRE-TRIP RECALL OF ADVERTISING

- » **21%** of visitors recalled noticing advertising about the Pensacola area (**20% in 2022**)
- » This information influenced **10%** of all visitors to visit the Pensacola area (**10% in 2022**)
- » Please note that these figures are topline and solely relies on the memory of each visitor even though various other factors go into the influence of advertising



SOURCES OF ADVERTISING EXPOSURE¹

Base: 21% of visitors who noticed advertising



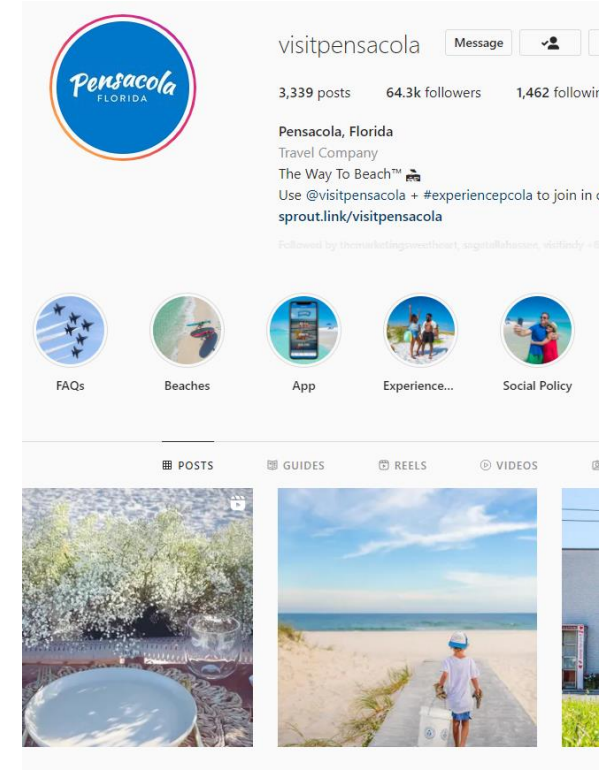
34% Personal social media
(26% in 2022)



28% Television
(30% in 2022)



17% VisitPensacola.com
(16% in 2022)



16% Visit Pensacola social media
(17% in 2022)

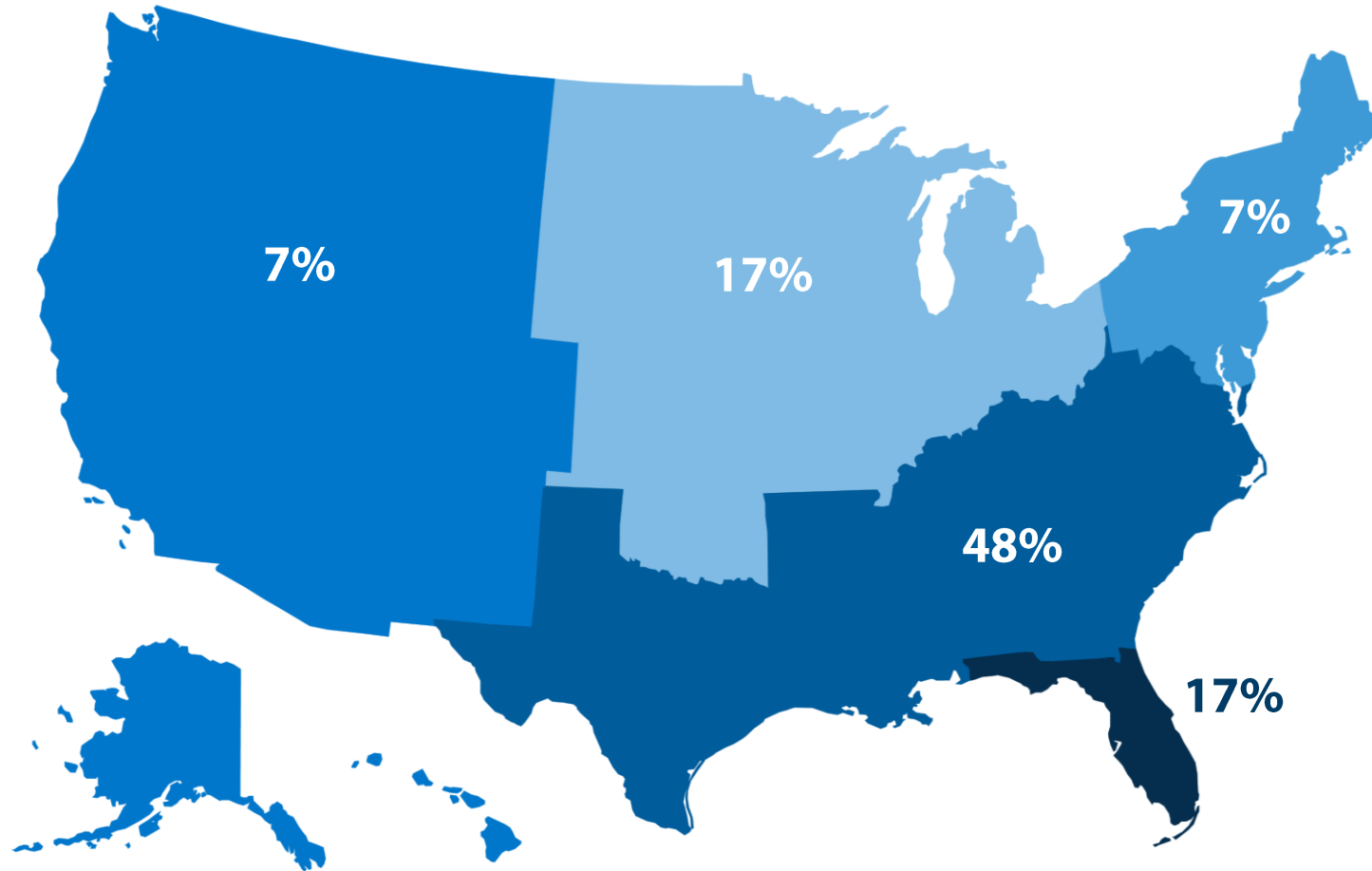
¹ Multiple responses permitted.

VISITOR JOURNEY: TRAVEL PARTY PROFILE



REGIONS OF ORIGIN¹

The southeast including Florida account for 2 in 3 visitors

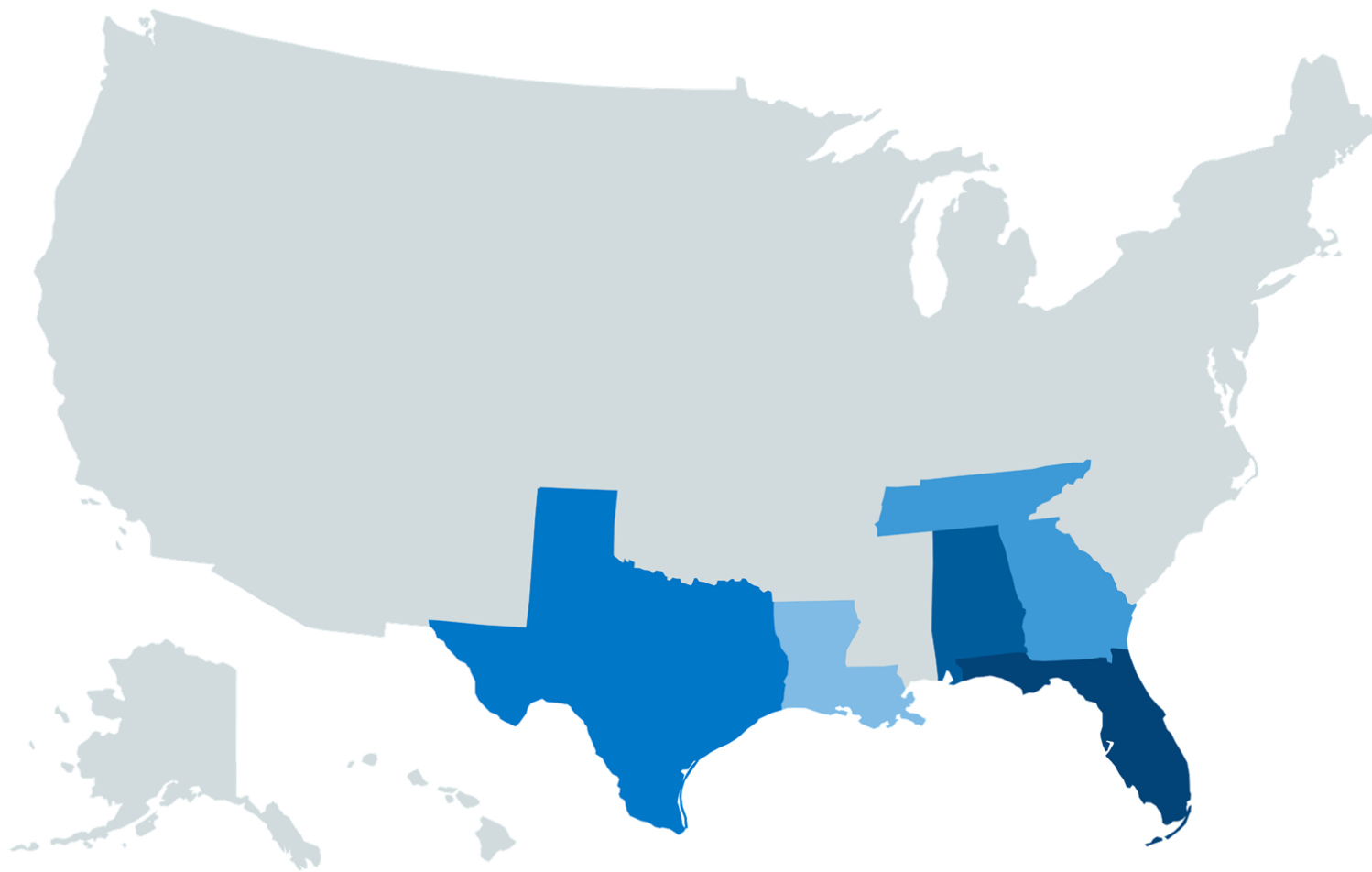








4% of visitors traveled to Pensacola from outside of the U.S.

¹Based on data from Visitor Tracking, Arrivalist, and Zartico.

TOP STATES OF ORIGIN¹

Over half of visitors reside in 6 states



- 17%  Florida
- 14%  Alabama
- 7%  Texas
- 6%  Georgia
- 5%  Tennessee
- 5%  Louisiana

TOP MARKETS OF ORIGIN¹



17% Mobile²
(13% in 2022)



5% Atlanta
(4% in 2022)



3% Birmingham
(3% in 2022)



3% New Orleans
(3% in 2022)



3% Nashville
(3% in 2022)



2% Dallas – Fort Worth
(3% in 2022)

TRAVEL PARTIES

- » The typical visitor traveled in a party composed of **3.1** people (3.1 in 2022)



- » **36%** traveled with at least one person under the age of 20 (36% in 2022)



VISITOR PROFILE

- » The typical Pensacola area Visitor:
 - » Is **44** years old (44 in 2022)
 - » Has a household income of **\$87,200** per year (\$88,500 in 2022)
 - » Female¹ 60% (57% in 2022)



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

NEW & RETURNING VISITORS

- » Over **1 in 4 visitors (27%)** were first time visitors to Pensacola area (**30% in 2022**)
- » **26%** of visitors were loyalists, having visited over 10 times (**23% in 2022**)



VISITOR JOURNEY: TRIP EXPERIENCE



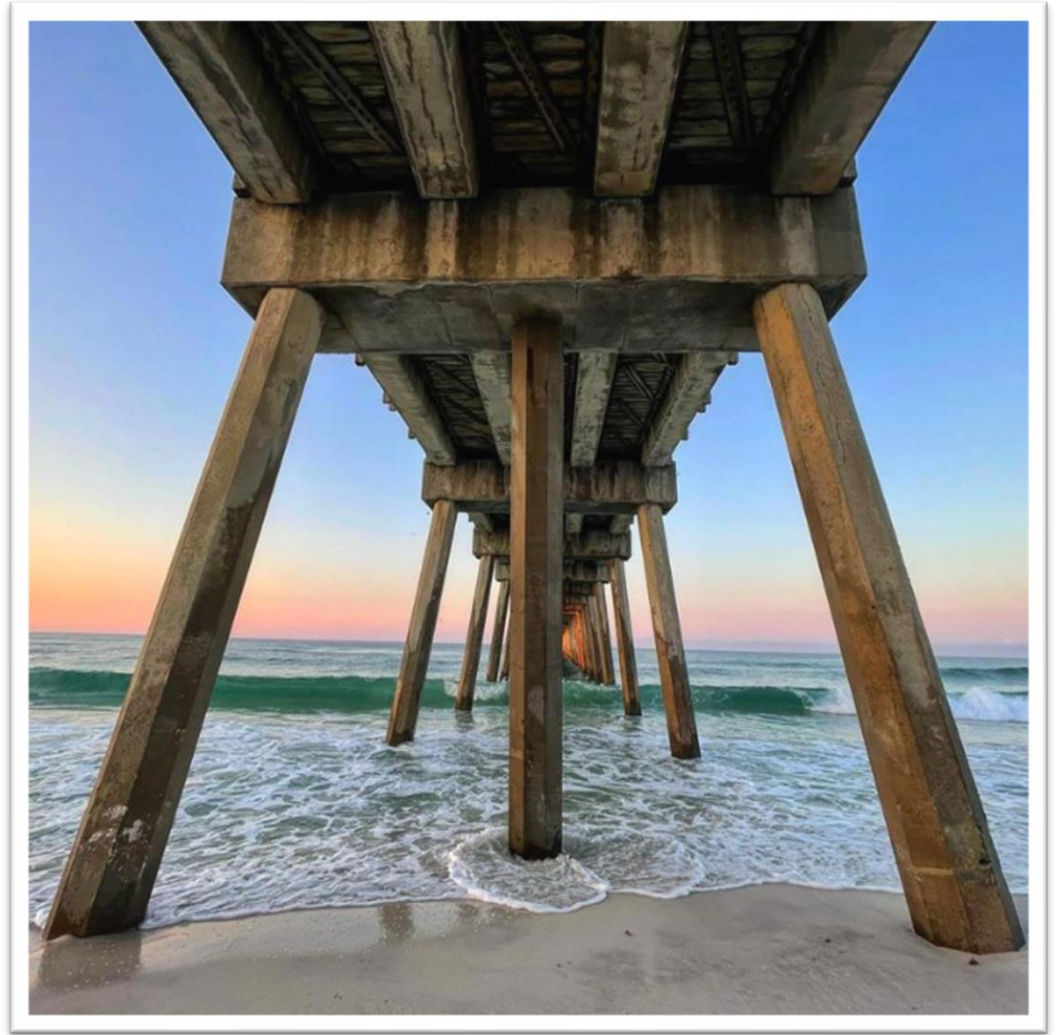
TRANSPORTATION

- » **84%** of visitors drove to the Pensacola area (83% in 2022)
- » **14%** of **all** visitors flew to Pensacola through the Pensacola International Airport (15% in 2022)



OVERNIGHT VISITORS

- » Over **1 in 3 (35%)** visitors stayed overnight in a **hotel, motel, or resort** (38% in 2022)
- » Typical visitors spent **4.5** nights in the Pensacola area (4.8 in 2022)



TOP ACCOMMODATIONS



35% Hotel/Motel/Resort
(38% in 2022)



22% Vacation rental home*
(21% in 2022)



22% Day tripper
(20% in 2022)

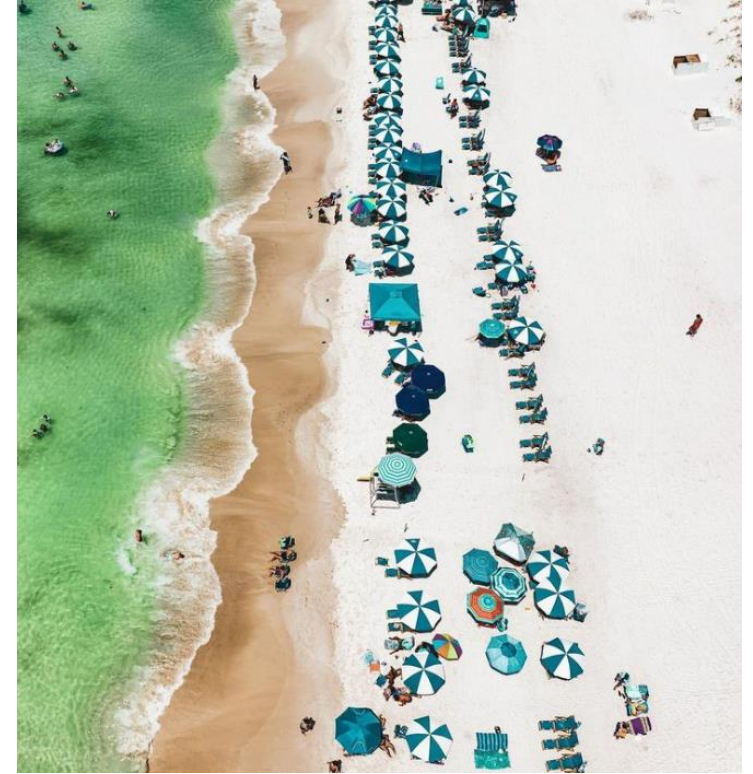
TOP ACTIVITIES DURING VISIT¹



81% Restaurants
(83% in 2022)



76% Relax and unwind
(76% in 2022)



72% Beach
(70% in 2022)

TRAVEL PARTY SPENDING

- » Travel parties spent **\$337** per day and **\$1,509** during their trip (\$345 per day and \$1,581 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) – **75%** were **very satisfied** (79% in 2022)
- » **92%** of visitors would **recommend** the area to others (93% in 2022)
- » **98%** of visitors would **return** to the Pensacola area (98% in 2022) – **73%** would **definitely return** (75% in 2022)



SATISFACTION RATINGS

- » **2 in 3** visitors expressed that **lodging (66%), restaurants (66%),** and **customer service (66%)** exceeded expectations
- » Over **half** of visitors expressed **value for their money** exceeded expectations



DETAILED FINDINGS

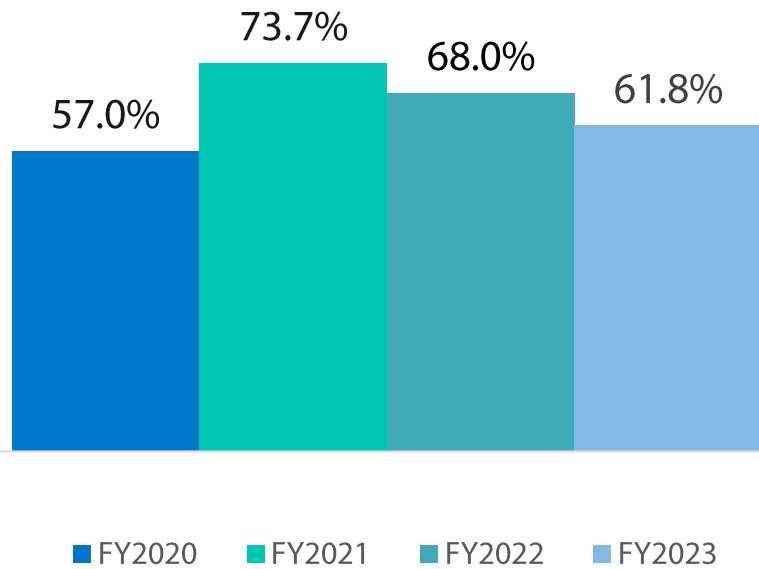


VISITOR JOURNEY: ECONOMIC IMPACT

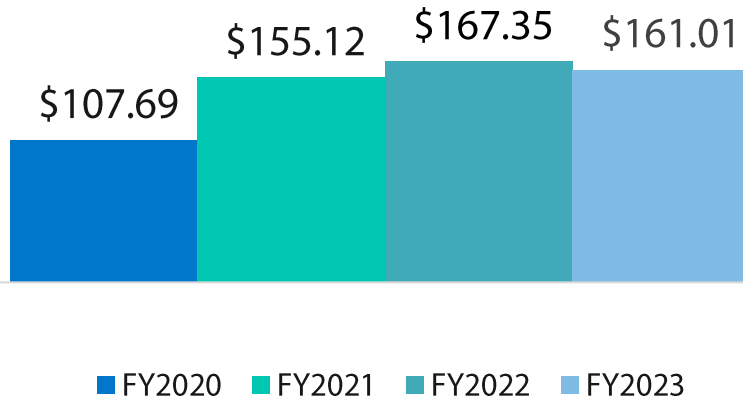


ACCOMODATION METRICS

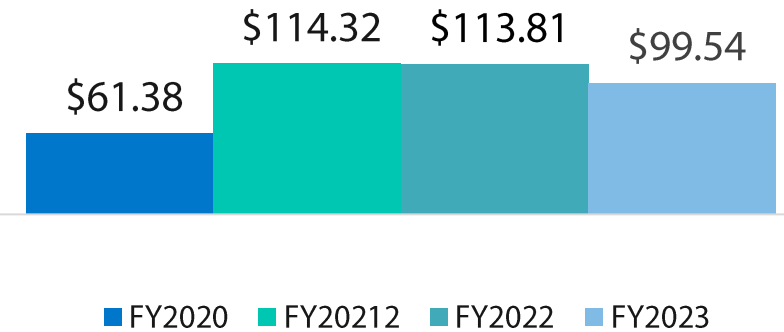
Occupancy



ADR

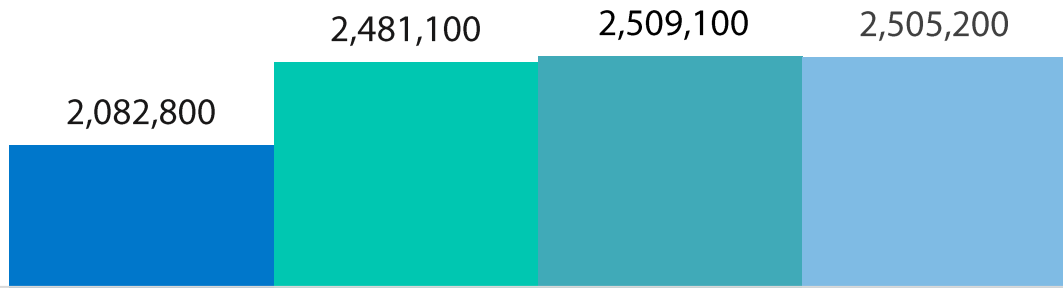


RevPAR

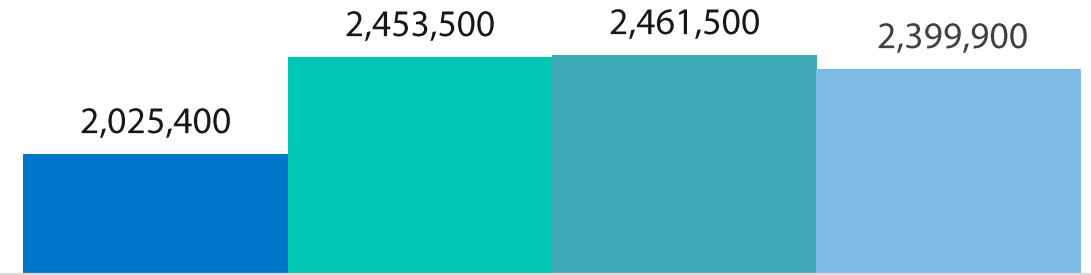


IMPACT OF TOURISM METRICS

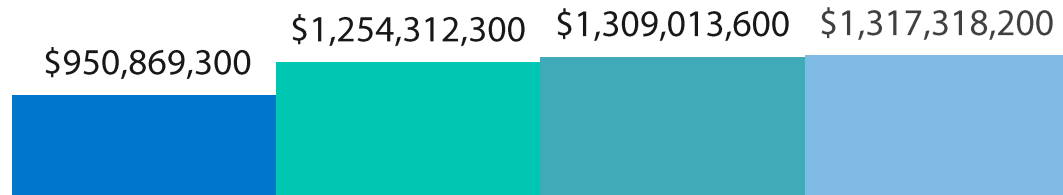
Visitors



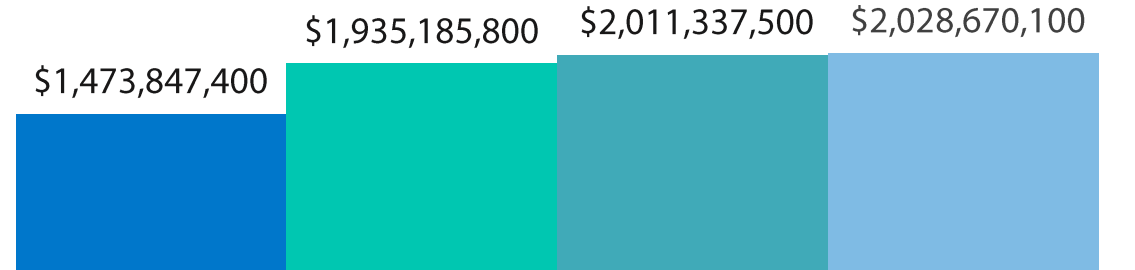
Room Nights



Direct Spending



Economic Impact

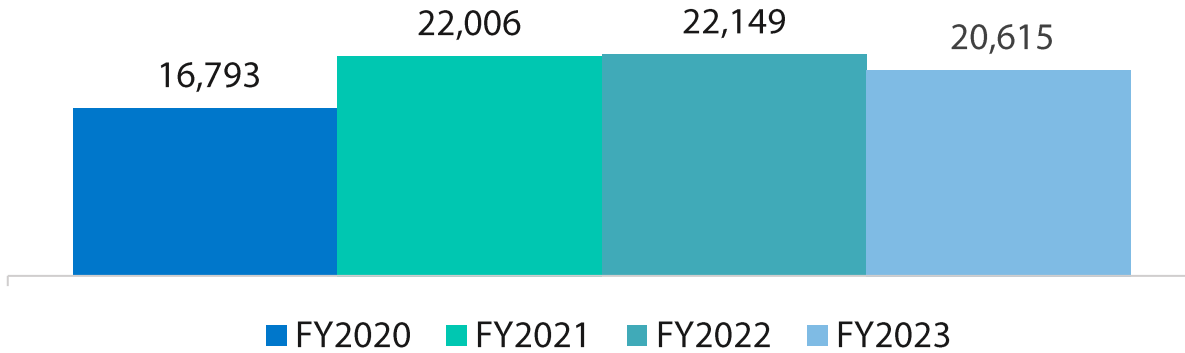


■ FY2020 ■ FY2021 ■ FY2022 ■ FY2023

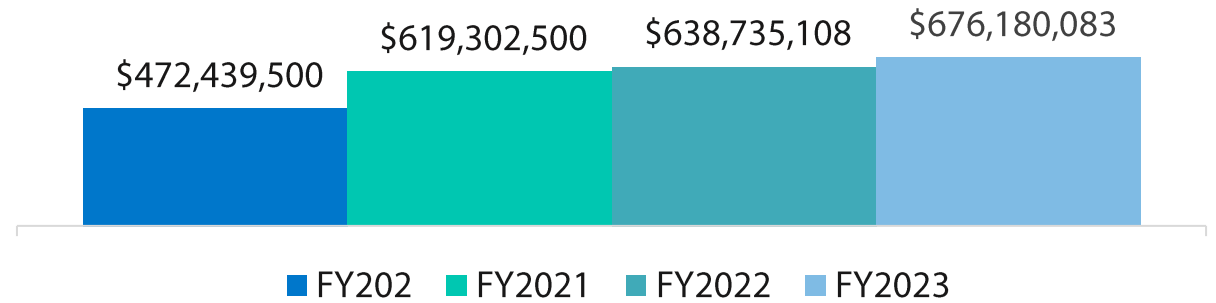
■ FY2020 ■ FY2021 ■ FY2022 ■ FY2023

IMPACT OF TOURISM METRICS CONT.

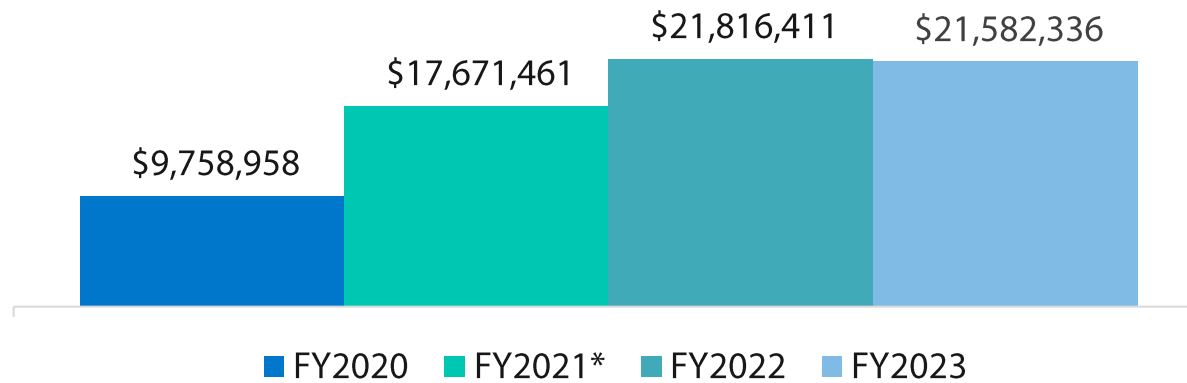
Jobs Supported



Wages Generated

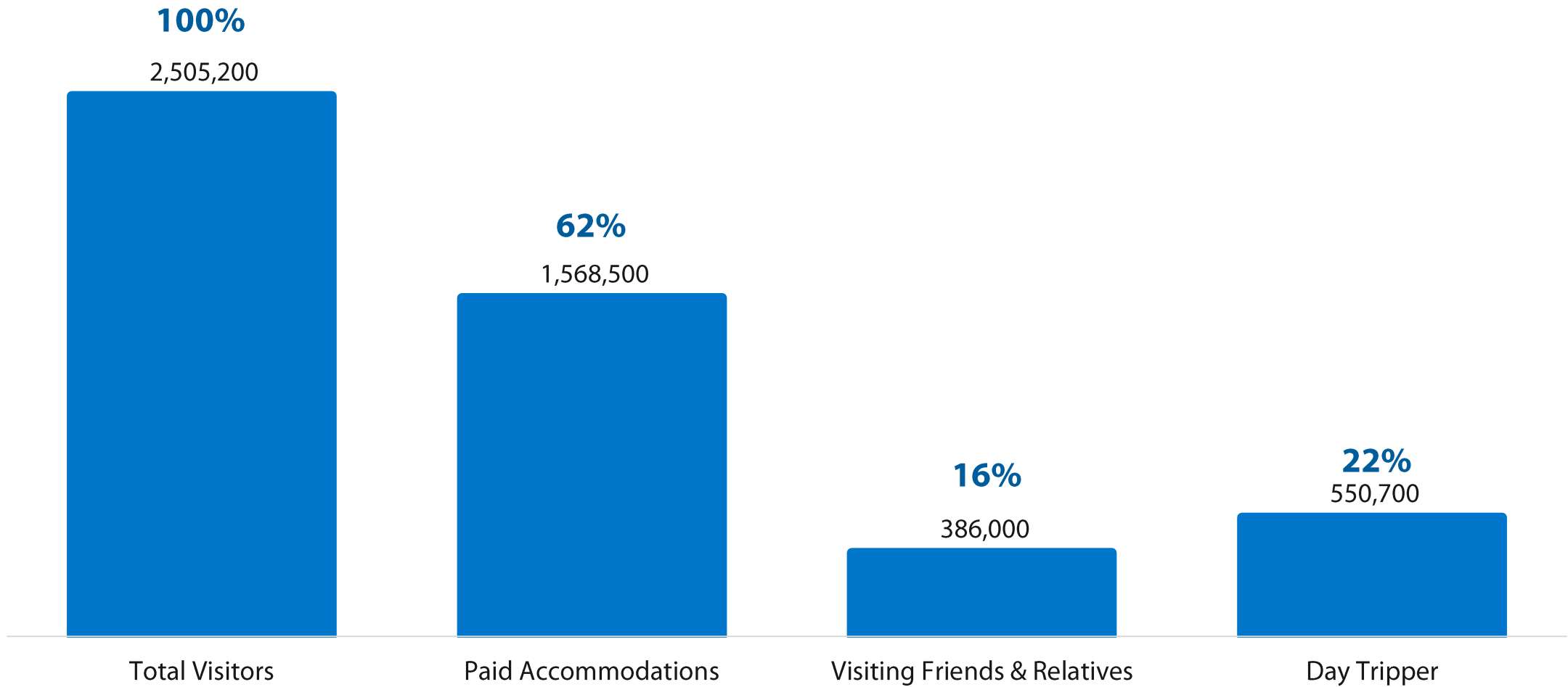


Tourism Development Tax

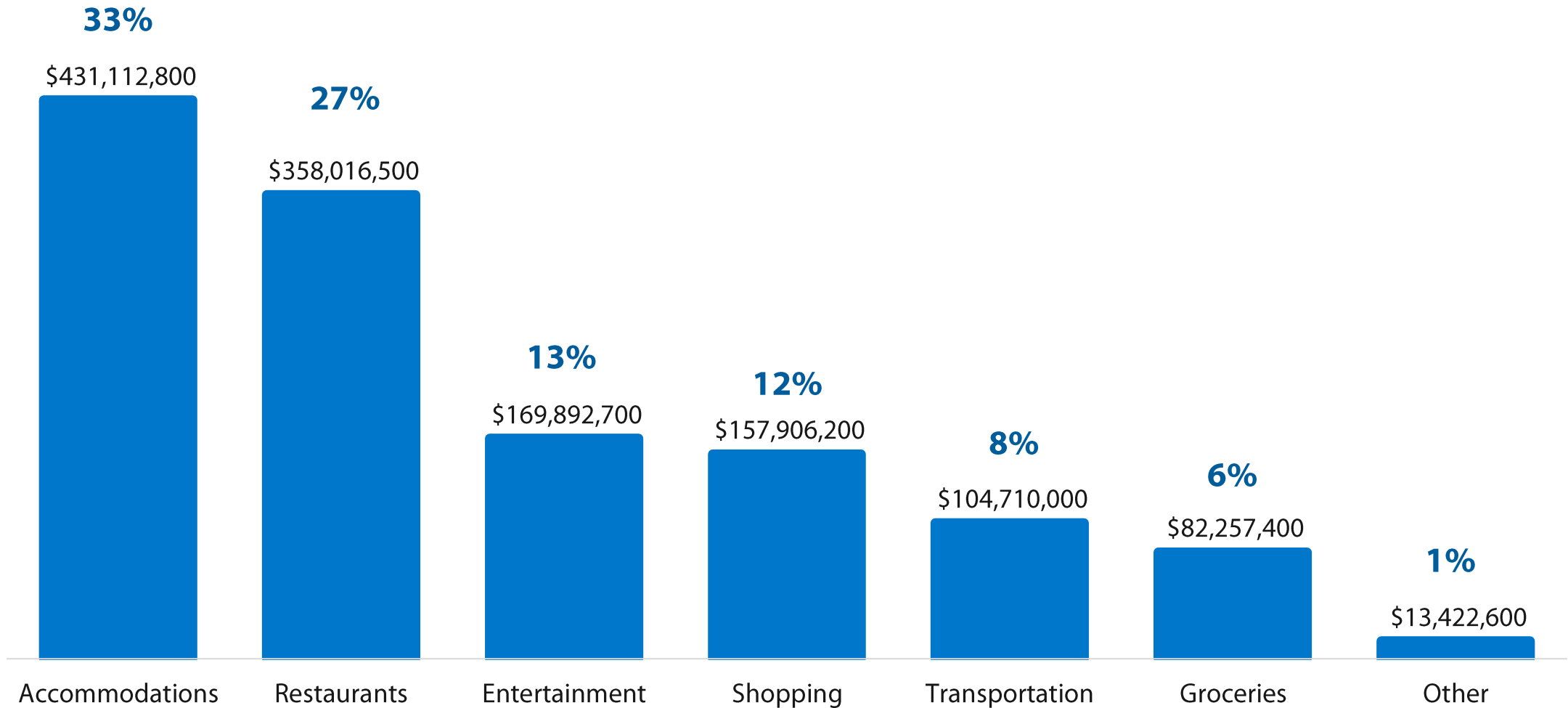


* April of FY2021 tax rate increased from 4% to 5%.

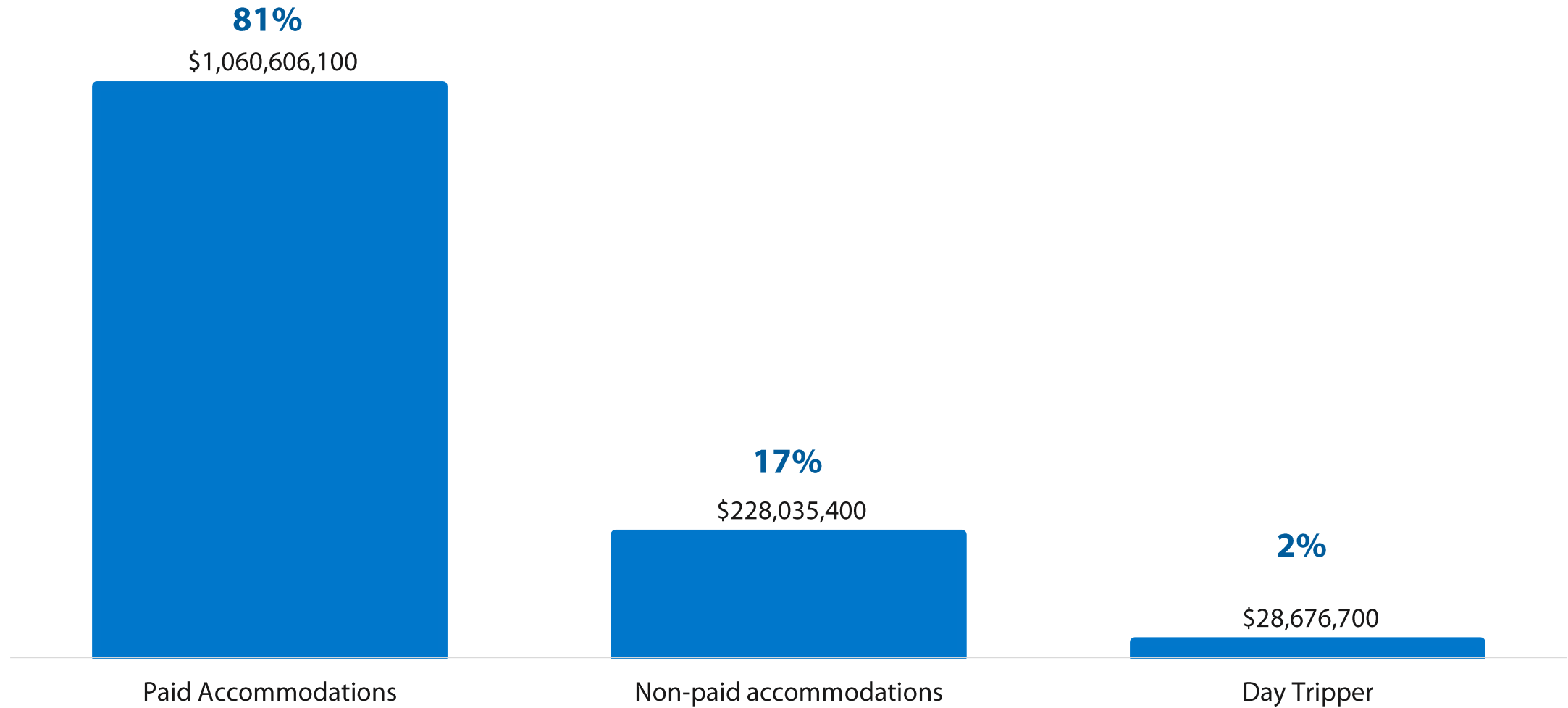
VISITOR TYPES



DIRECT SPENDING



DIRECT SPENDING BY VISITOR TYPE

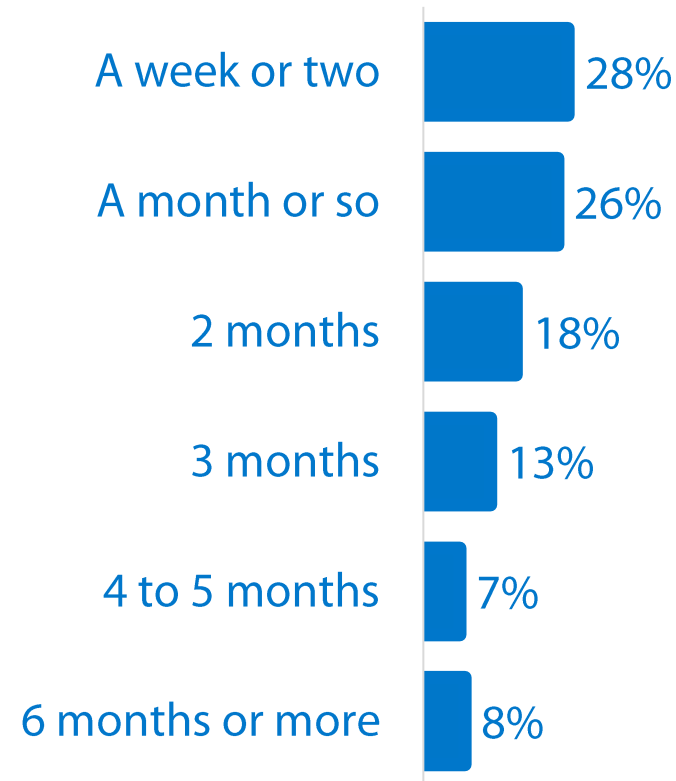


VISITOR JOURNEY: PRE-VISIT



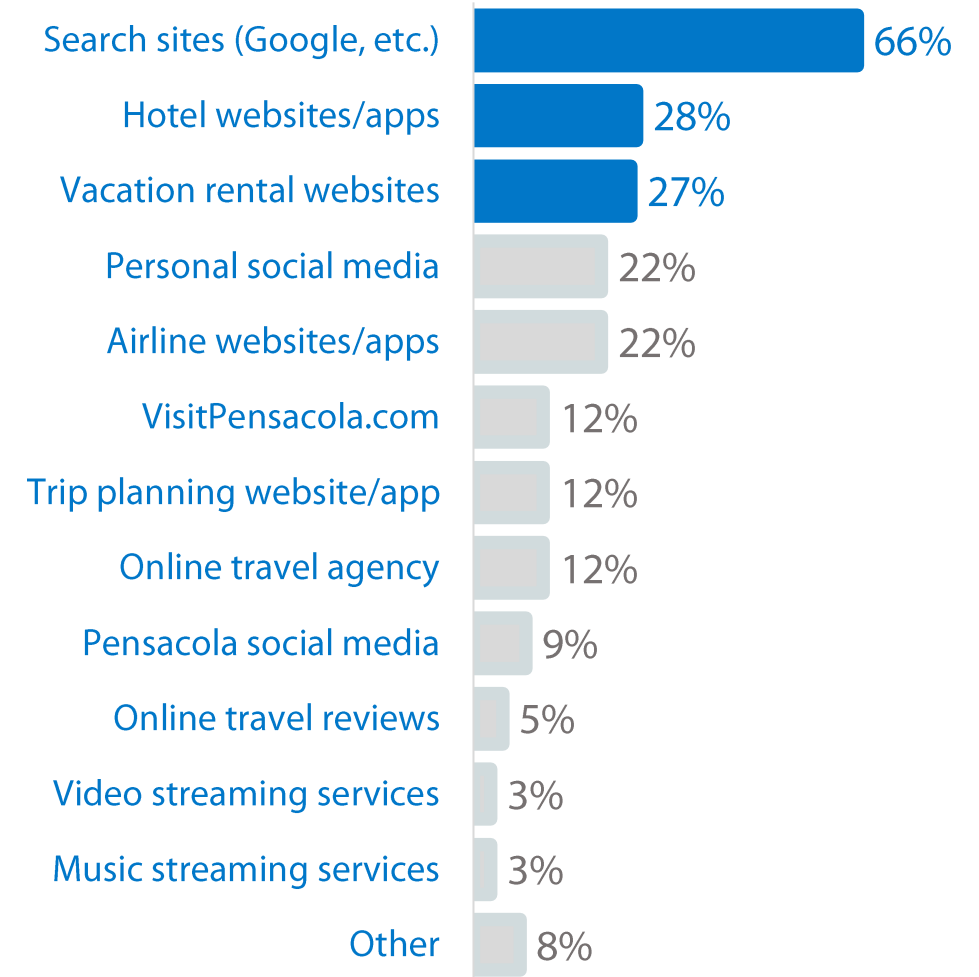
TRIP PLANNING CYCLE

- » Visitors to Pensacola have short trip planning windows, as over **half** of visitors planned their trip to the Pensacola area **a month or less in advance** (54% in 2022)
- » On the other hand, nearly **3 in 10** visitors planned their trips at **least 3 months in advance**
- » Average trip planning cycle began **57 days** before the trip (59 days in 2022)



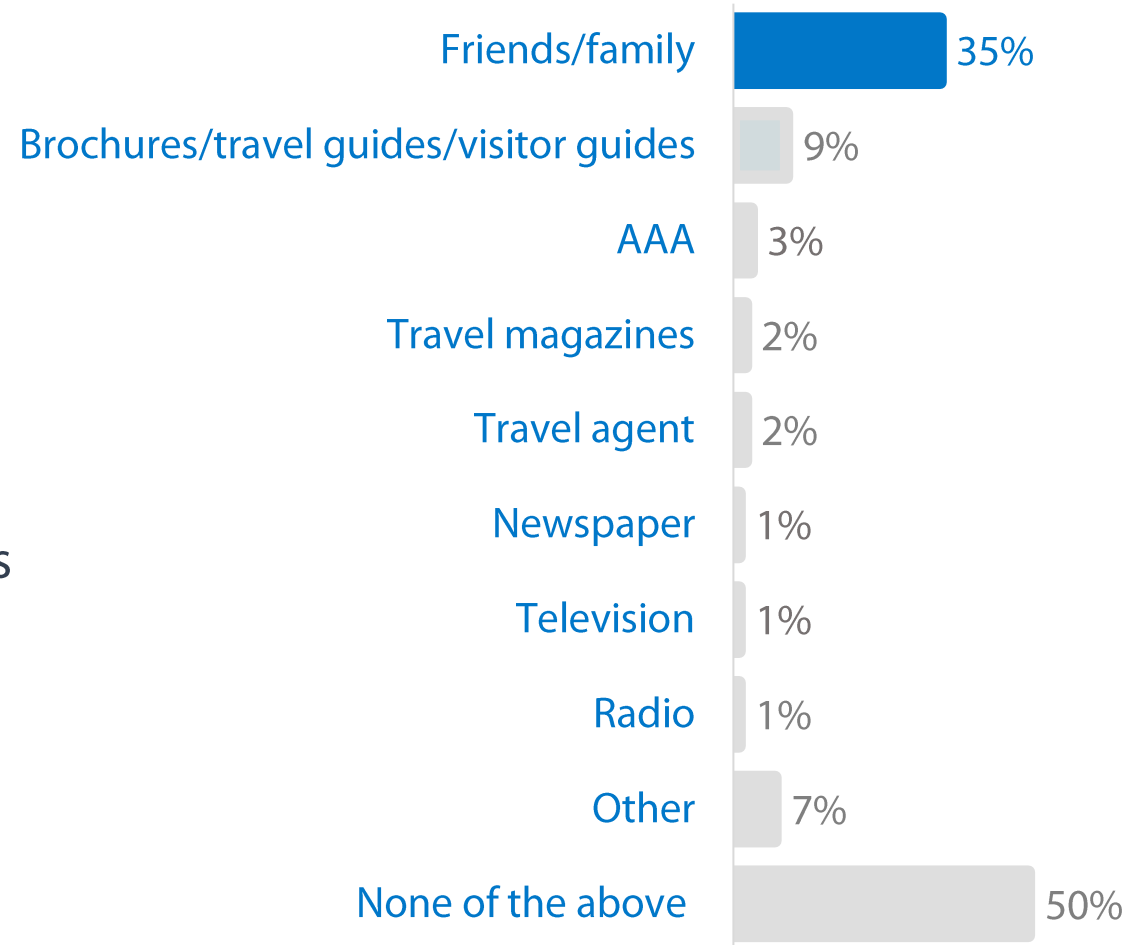
ONLINE TRIP PLANNING SOURCES¹

- » **Search sites such as Google** continue to be the **number one planning source** for trips to Pensacola
- » **Hotel website/apps** are **good advertising mediums** for Pensacola as nearly **3 in 10** visitors used this planning source
- » Over **1 in 4** visitors used **vacation rental websites**
- » **12%** of visitors used **VisitPensacola.com** to plan their trip (14% in 2022)



OTHER TRIP PLANNING SOURCES¹

- » Over **1 in 3** visitors planned their trip to the Pensacola area through **friends/family**
- » More **traditional planning sources** such as brochures followed distantly



VISITOR GUIDE

- » Nearly **1 in 5** visitors requested or viewed the Pensacola Visitors Guide (22% in 2022)
- » **Online** consumption of the Pensacola Visitor Guide was 8 times greater than print consumption

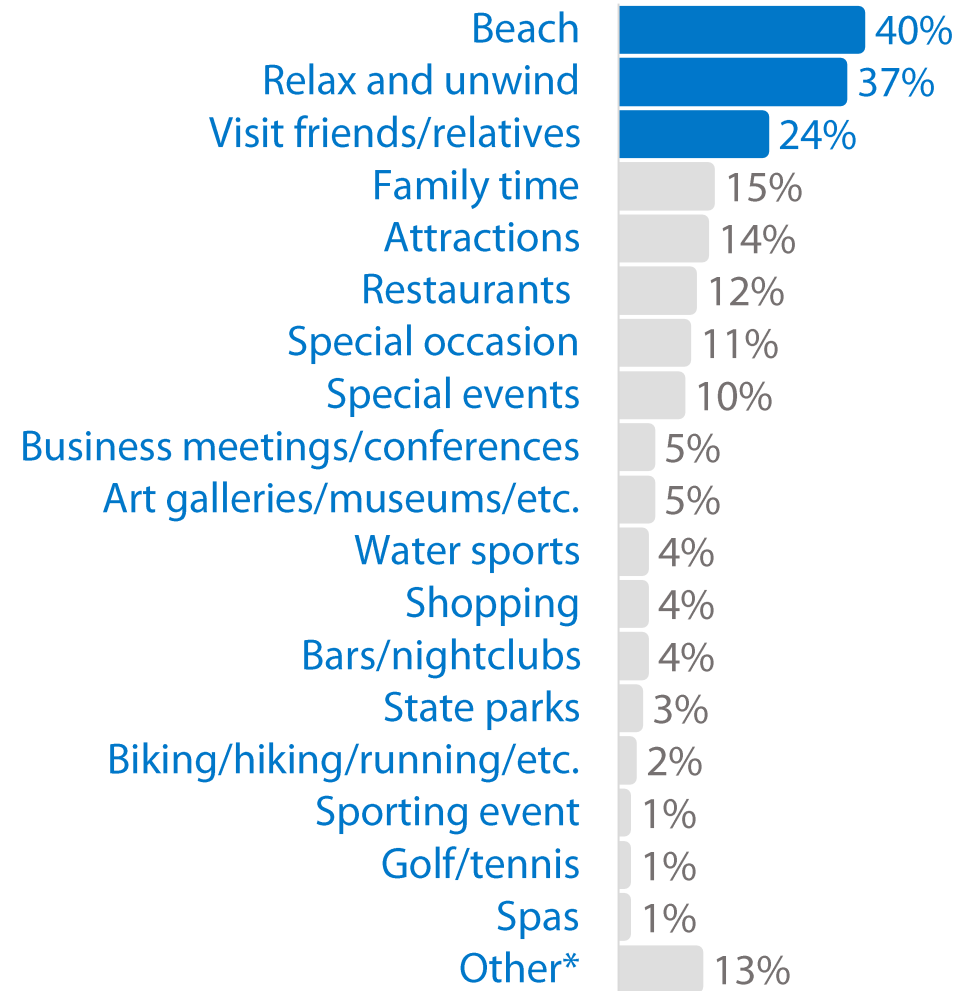
Requested a print version 2%

Viewed it online 16%

Did not request/view a Visitors Guide 82%

REASONS FOR VISITING¹

- » **The beach** along with **relax and unwind** are the **top** reasons for visiting as **2 in 5** visitors came to Pensacola for these reasons
- » Nearly **1 in 4** visitors came to **visit friends and relatives**

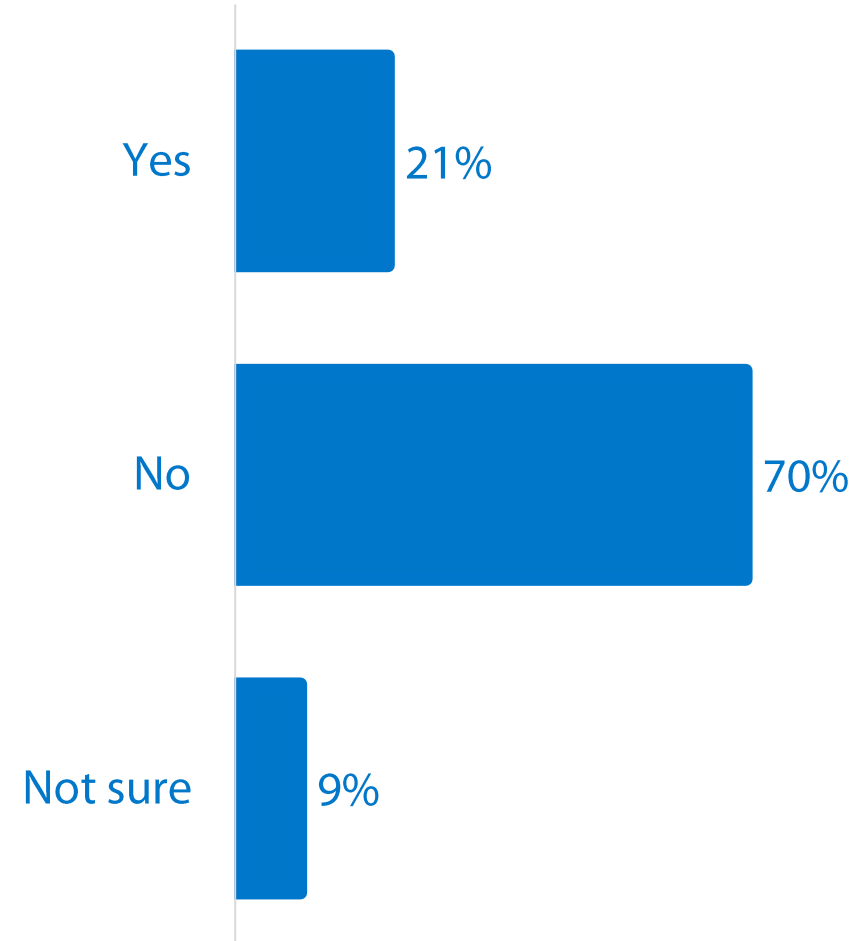


¹ Three responses permitted.

* Other reasons include visiting for the weather, a spring break trip, for a graduation ceremony, and to look for a second home.

ADVERTISING

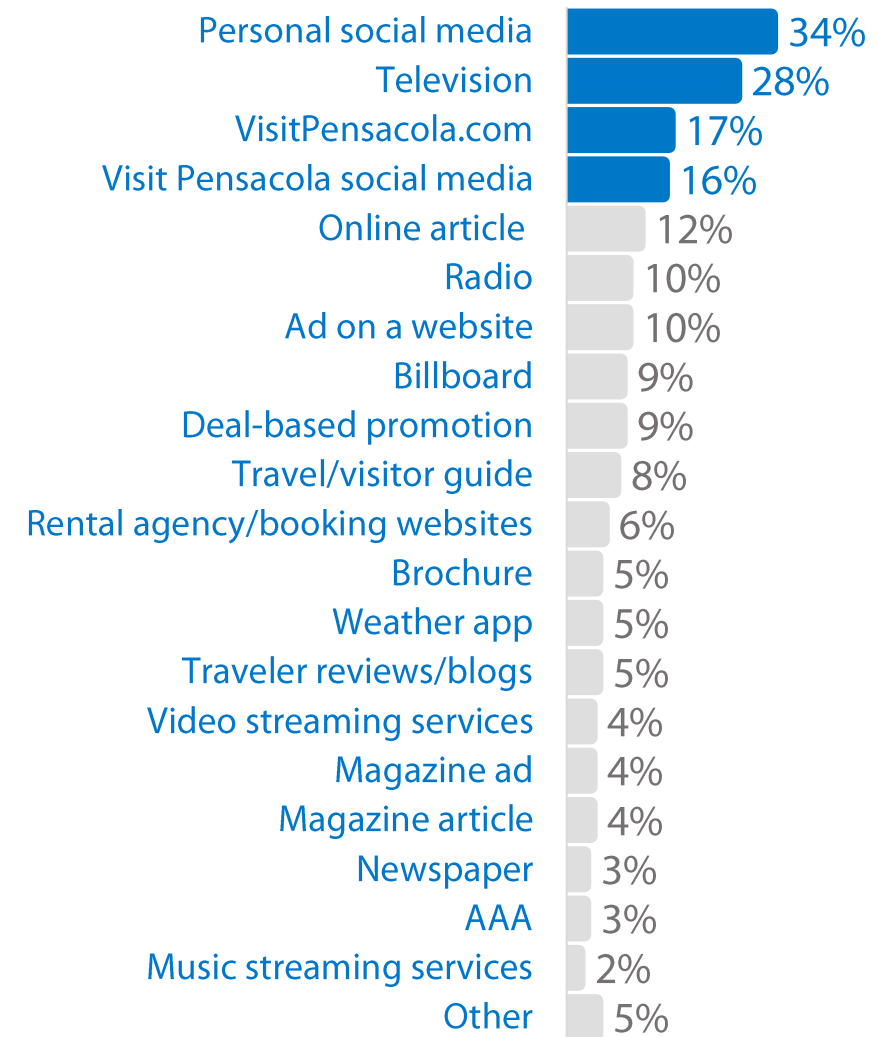
- » Over **1 in 5** visitors recalled advertising about the Pensacola area (20% in 2022)
- » This information influenced **10%** of **all** visitors to visit the Pensacola area (10% in 2022)
- » Please note that these figures are topline and solely relies on the memory of each visitor even though various other factors go into the influence of advertising



ADVERTISING SOURCE¹

- » Most visitors who recalled advertising for the Pensacola area noticed it on **personal social media** or **television**
- » About **1 in 6** visitors who recalled advertising saw an advertisement on **Visit Pensacola social media** or **VisitPensacola.com**

Base: 21% of visitors who recalled advertising

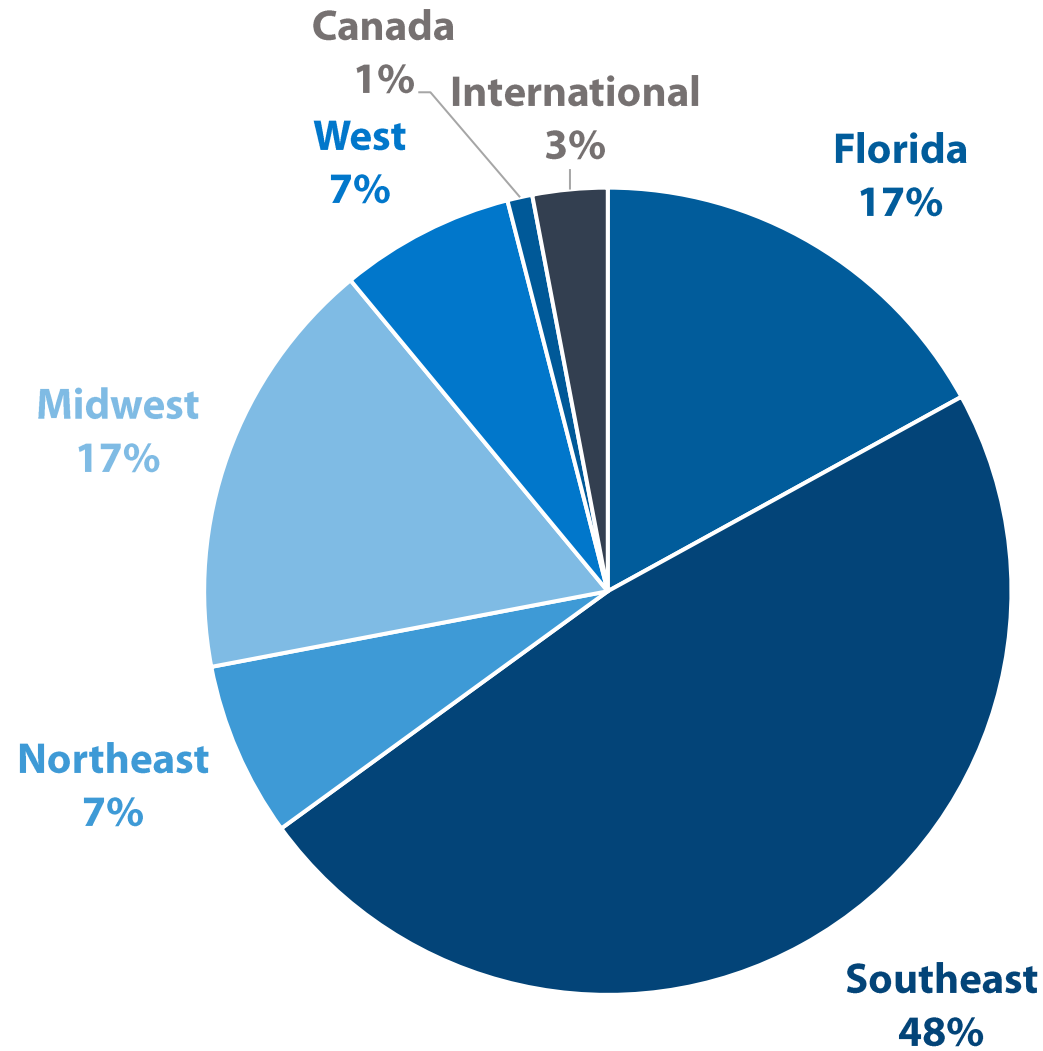


¹ Multiple responses permitted.

VISITOR JOURNEY: TRAVEL PARTY PROFILE



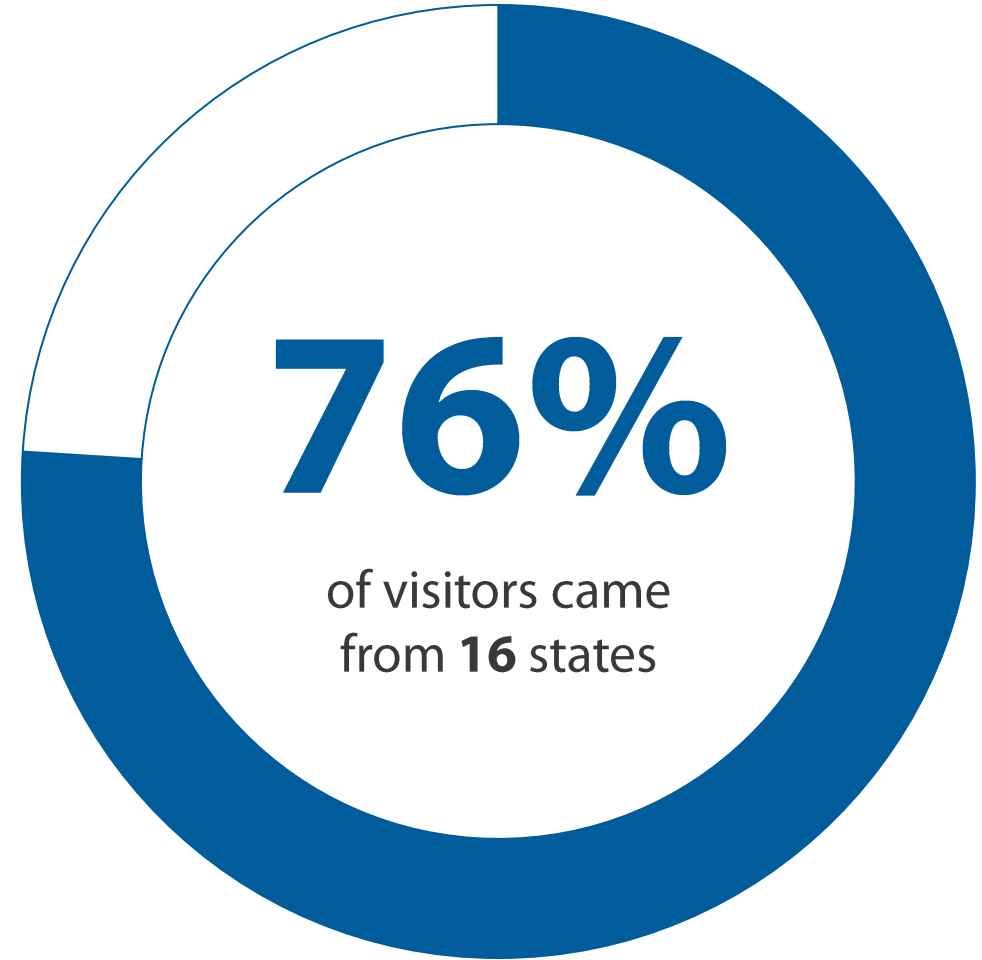
REGION OF ORIGIN¹



¹ Based on data from Visitor Tracking, Arrivalist, and Zartico
Top International countries include: UK, Netherlands, France, & Germany. Zartico was used to supplement some data.

STATE OF ORIGIN¹

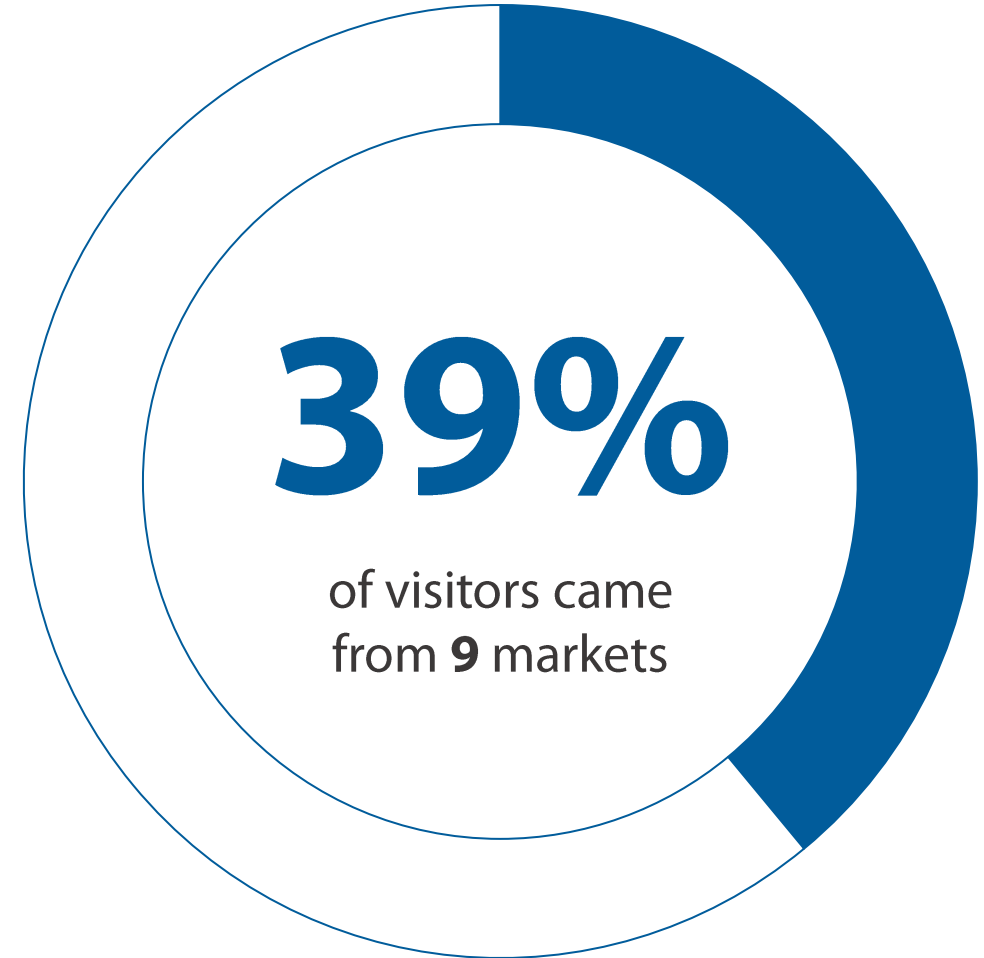
	FY2023
Florida	17%
Alabama	14%
Texas	7%
Georgia	6%
Louisiana	5%
Tennessee	5%
Mississippi	4%
Arkansas	2%
Illinois	2%
Indiana	2%
Kentucky	2%
Missouri	2%
New York	2%
North Carolina	2%
Ohio	2%
Wisconsin	2%



¹ Based on data from Visitor Tracking, Arrivalist, and Zartico.

TOP ORIGIN MARKETS¹

	FY2023
Mobile ²	17%
Atlanta	5%
Birmingham	3%
Nashville	3%
New Orleans	3%
Chicago	2%
Dallas – Fort Worth	2%
Houston	2%
Panama City	2%

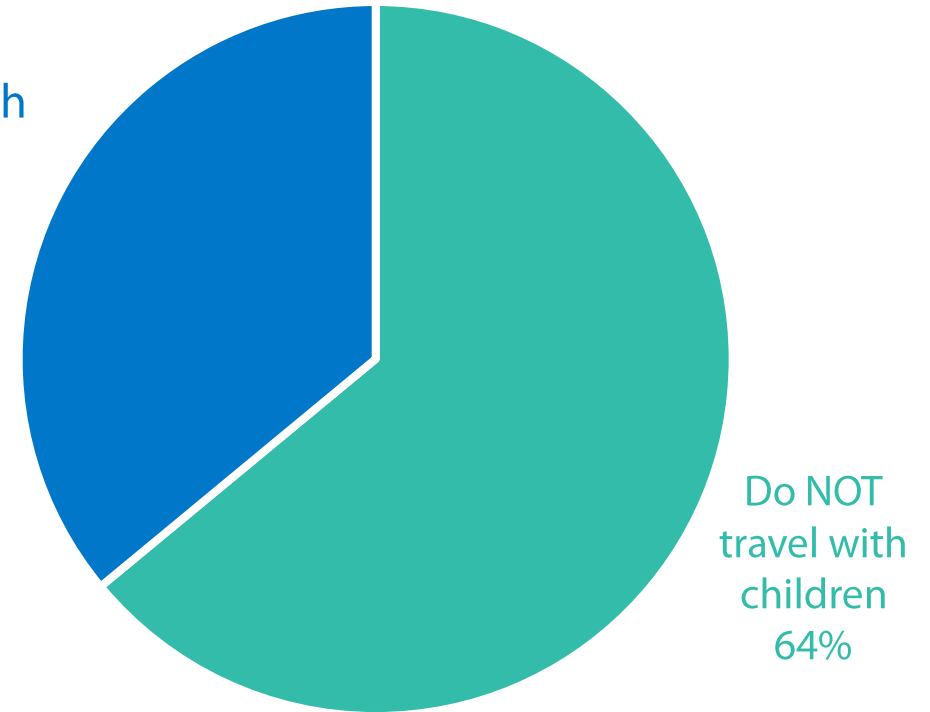


¹ Based on data from Visitor Tracking, Arrivalist, and Zartico.
² Mobile DMA spans across Florida, Alabama, and Mississippi.

TRAVEL PARTIES

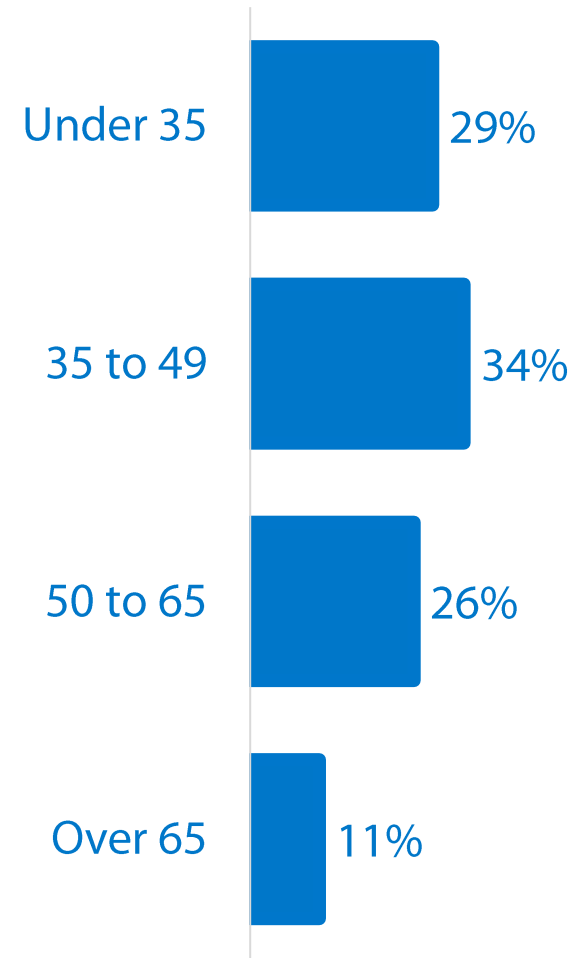
- » For all visitors, the typical travel party size was **3.1** (3.1 in 2022)
- » Nearly **2 in 5** travel parties included children under the age of 20 (36% in 2022)

Travel with children
36%



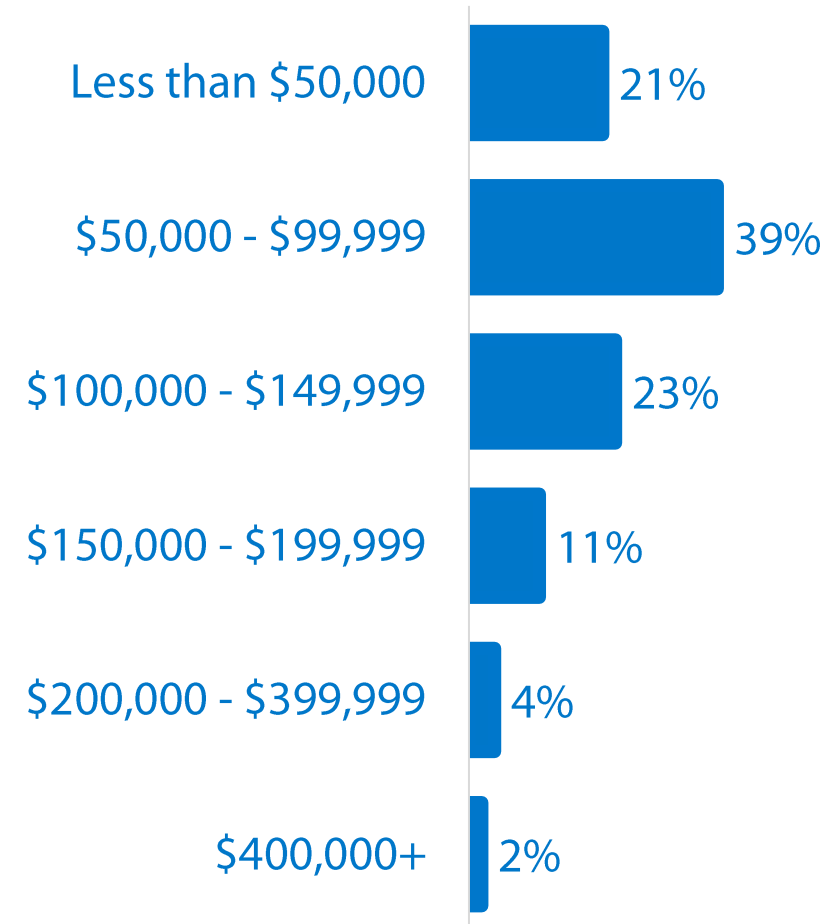
AGE

» The median age of visitors to the Pensacola area was **44** (44 in 2022)



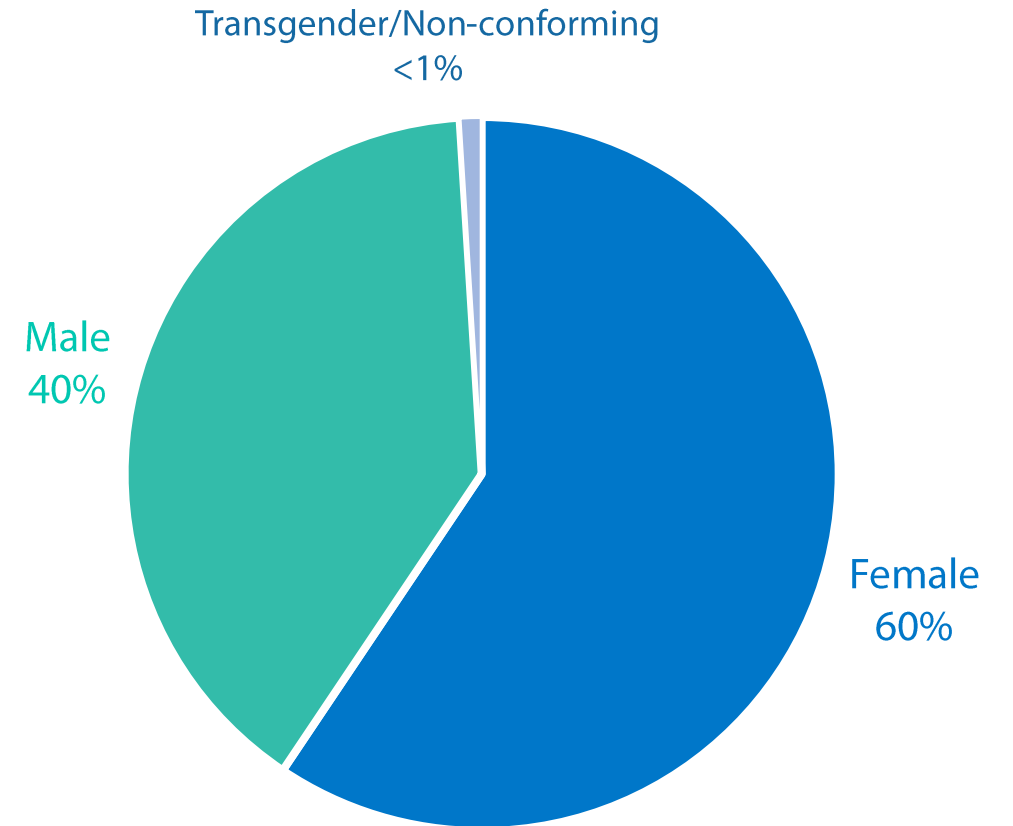
HOUSEHOLD INCOME

- » Visitors to the Pensacola area had a median household income of **\$87,200** per year (\$88,500 in 2022)
- » **17%** of visitors had household incomes over **\$150,000**



GENDER

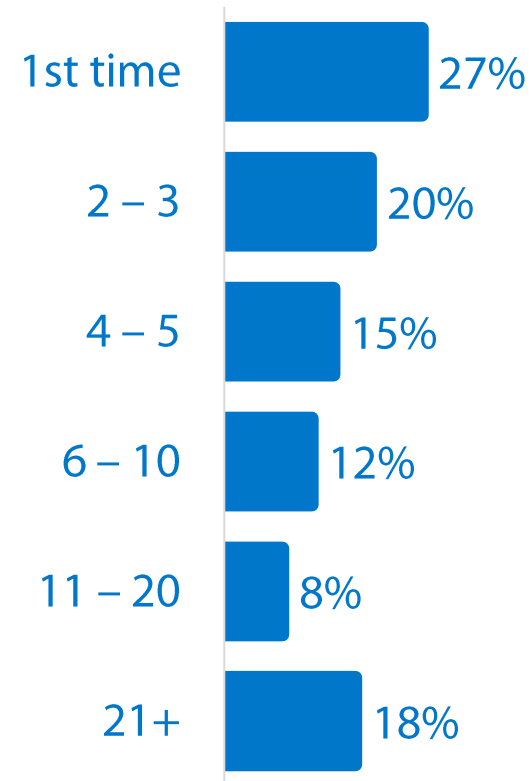
» **60%** of visitors interviewed were **female**¹ (57% in 2022)



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

NEW & RETURNING VISITORS

- » Nearly **3 in 10** visitors said **this was their first time visiting** the Pensacola area (30% in 2022)
- » **26%** of visitors were loyalists having visited over 10 times (23% in 2022)

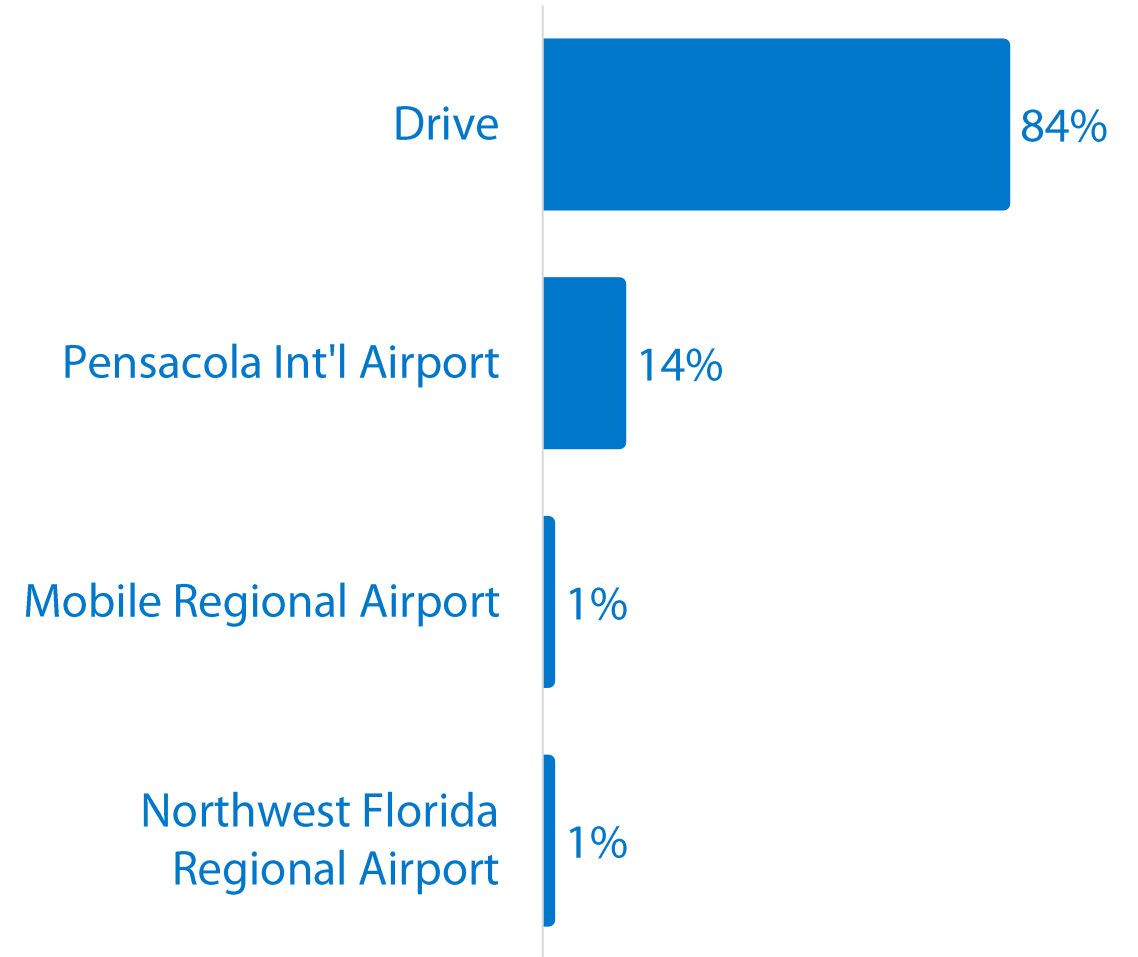


VISITOR JOURNEY: TRIP EXPERIENCE



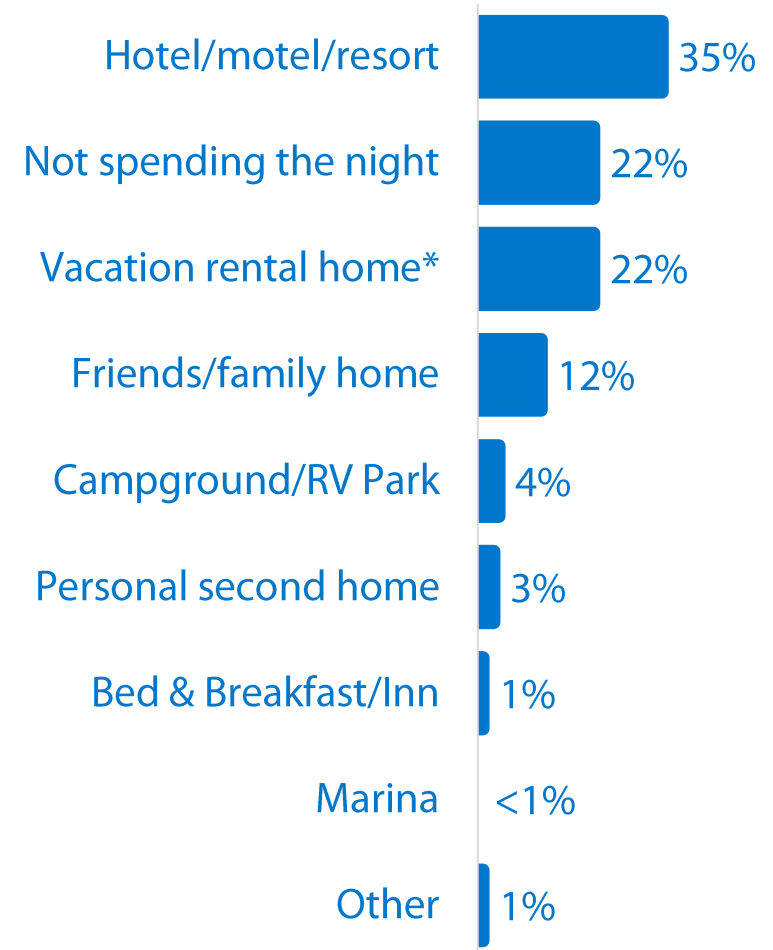
TRANSPORTATION

- » **84%** of visitors drove to Pensacola area for their trip (83% in 2022)
- » **14%** of **all** visitors used the **Pensacola International Airport** (15% in 2022)



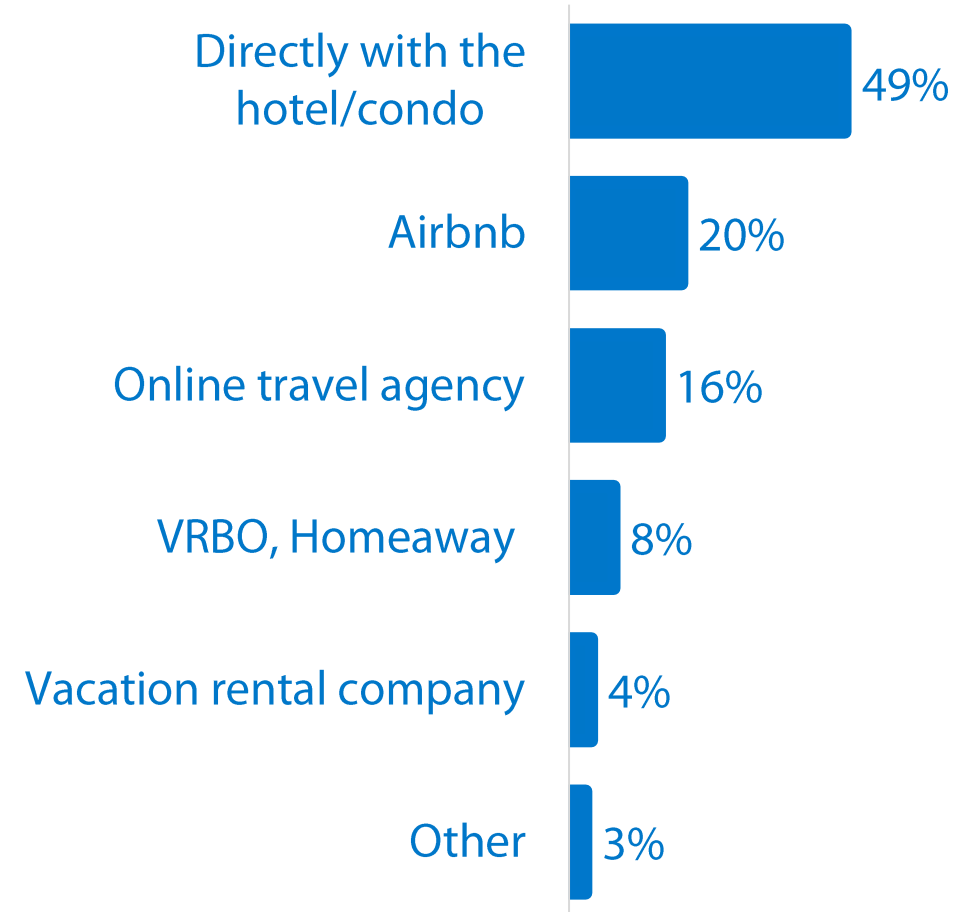
ACCOMMODATIONS

- » Over **1 in 3** visitors stayed overnight in a **hotel, motel, or resort** (38% in 2022)
- » Typical visitors stayed **4.5** nights in Pensacola area (4.8 in 2022)
- » Typical visitors staying in paid accommodations stayed **5.1** nights in the Pensacola area (5.2 in 2022)



ACCOMMODATION BOOKING

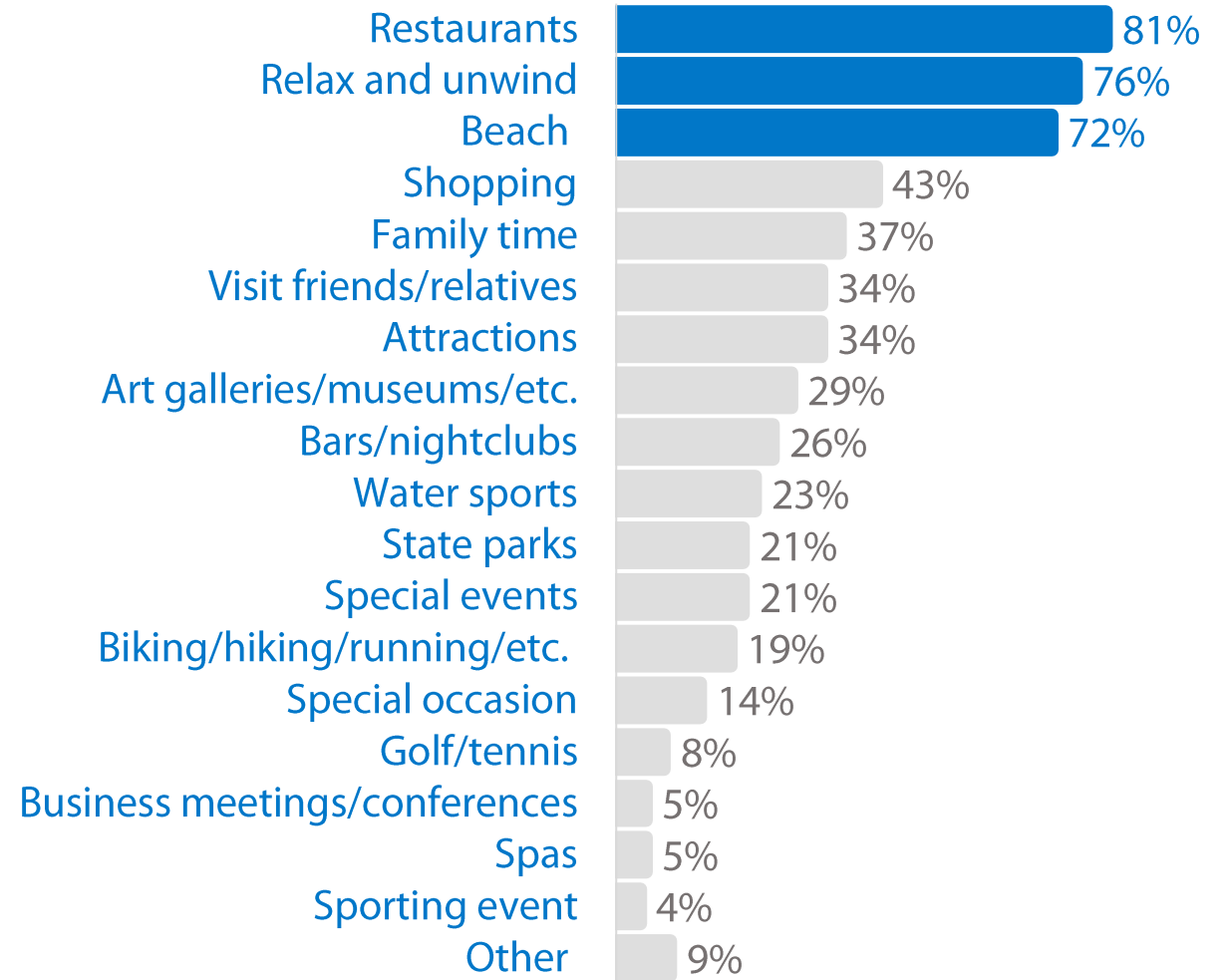
- » Nearly **Half** of visitors booked their trip to the Pensacola area **directly with the hotel/condo** (50% in 2022)
- » **1 in 5** visitors booked through **Airbnb** (18% in 2022)



VISITOR ACTIVITIES¹

» Top activities enjoyed by visitors this year include:

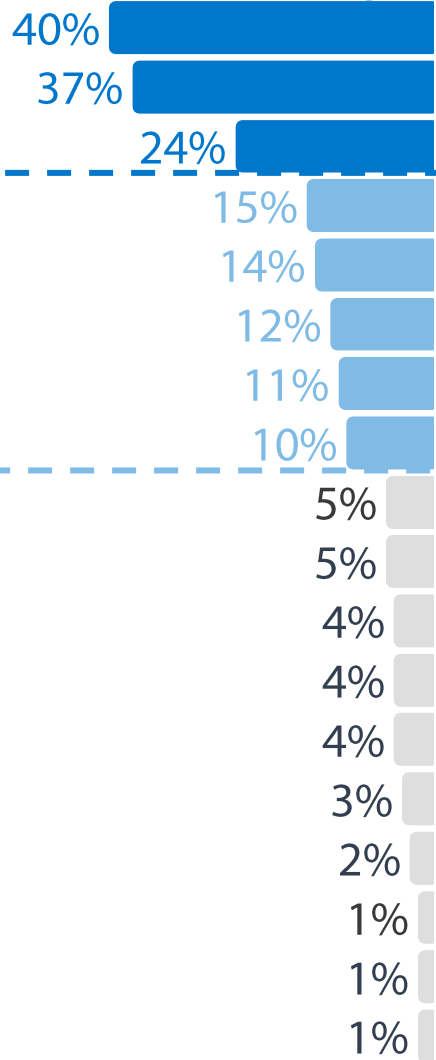
- » **Eating at restaurants**
- » **Enjoying relaxation**
- » **Visiting the beach**



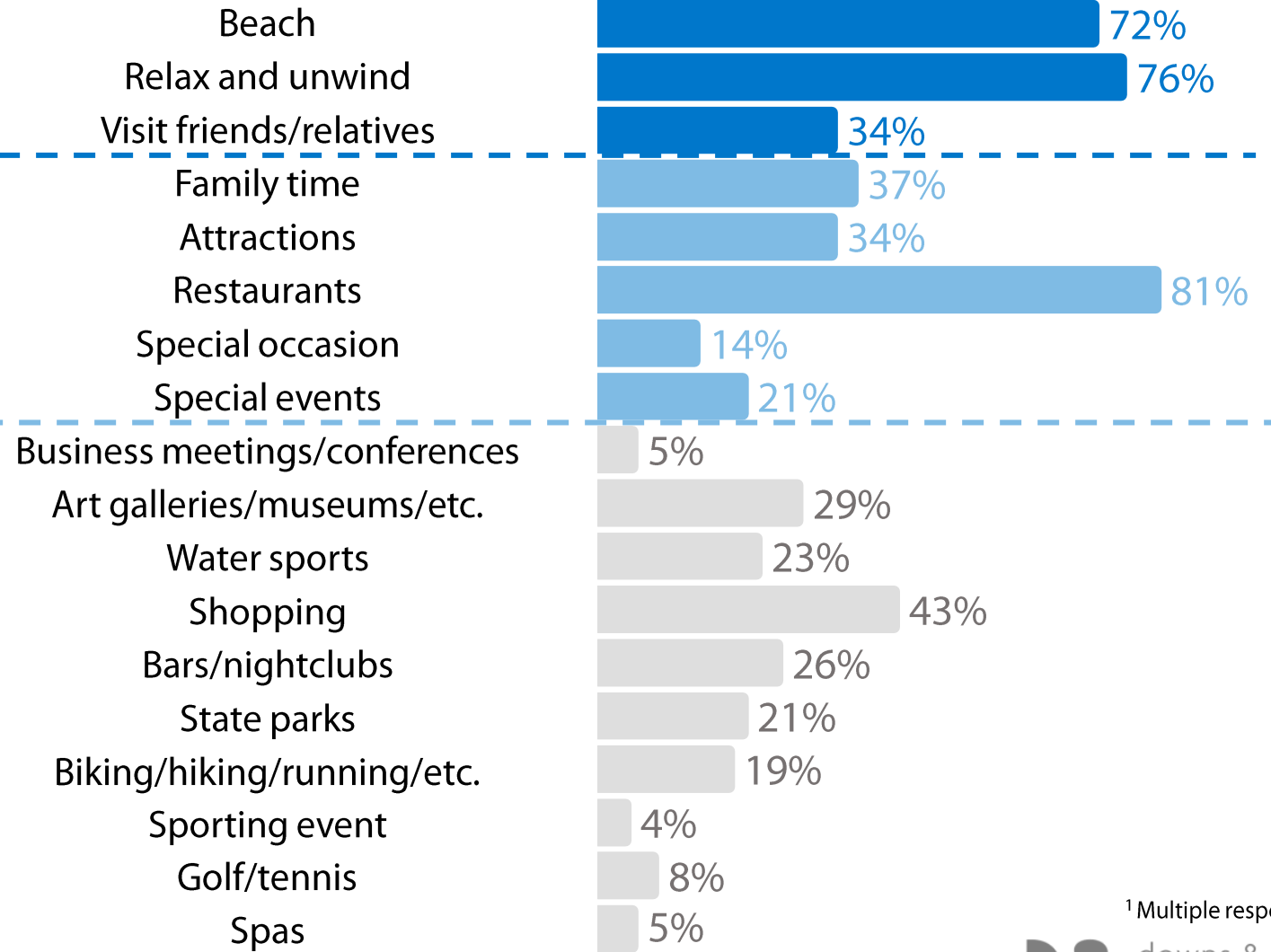
¹ Multiple responses permitted.

ACTIVITIES V. REASON FOR VISIT¹

Reason for Visiting



Visitor Activities



¹ Multiple responses permitted.

DAILY TRAVEL PARTY SPENDING

	<i>All Visitors 2022</i>	<i>All Visitors 2023</i>
<i>Accommodations</i>	\$125	\$111
<i>Restaurants</i>	\$94	\$93
<i>Groceries</i>	\$17	\$19
<i>Shopping</i>	\$39	\$40
<i>Activities & attractions</i>	\$42	\$45
<i>Transportation</i>	\$26	\$26
<i>Other</i>	\$2	\$3
<i>Daily Spending</i>	\$345	\$337

TOTAL TRAVEL PARTY SPENDING

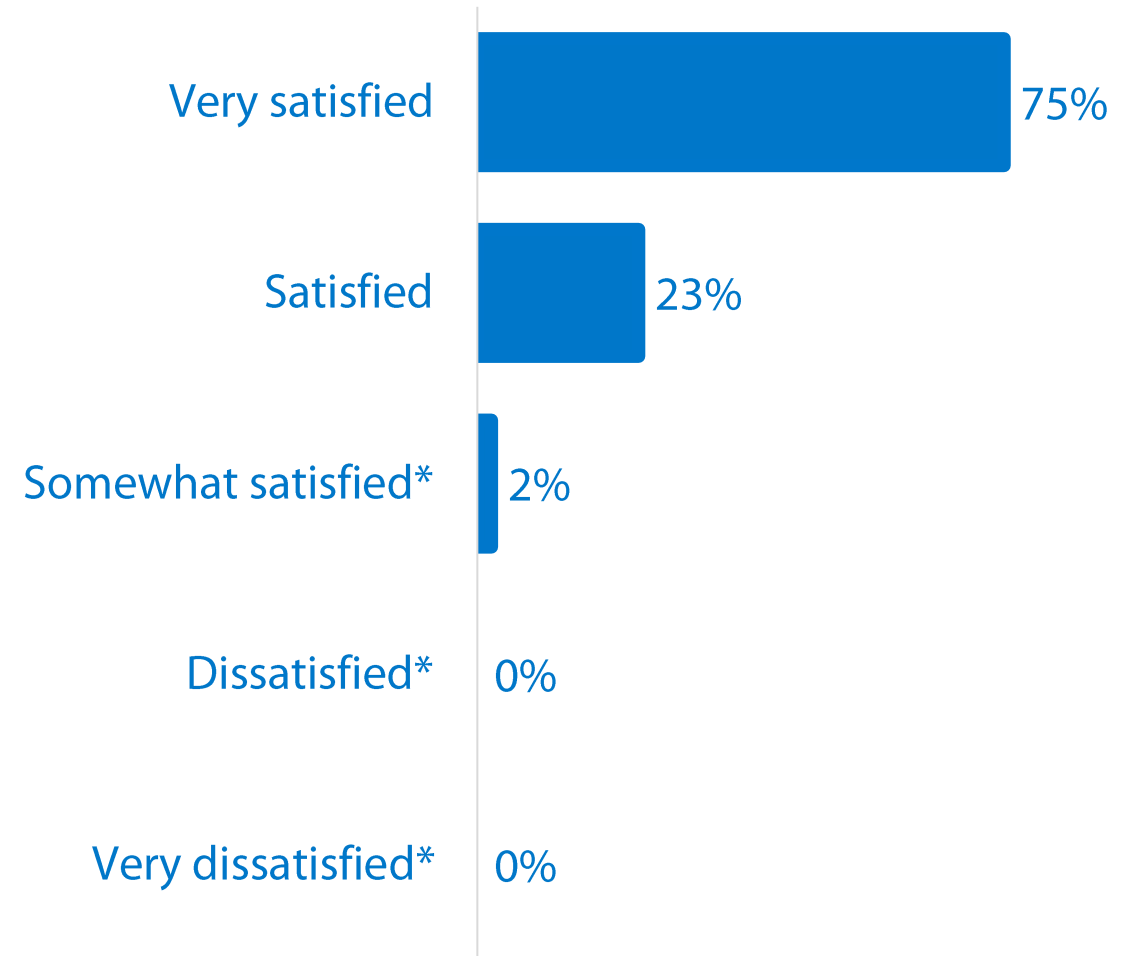
	<i>All Visitors 2022</i>	<i>All Visitors 2023</i>
<i>Accommodations</i>	\$541	\$477
<i>Restaurants</i>	\$446	\$421
<i>Groceries</i>	\$79	\$89
<i>Shopping</i>	\$188	\$181
<i>Activities & attractions</i>	\$197	\$204
<i>Transportation</i>	\$123	\$121
<i>Other</i>	\$7	\$16
<i>Total Spending</i>	\$1,581	\$1,509

VISITOR JOURNEY: POST-TRIP



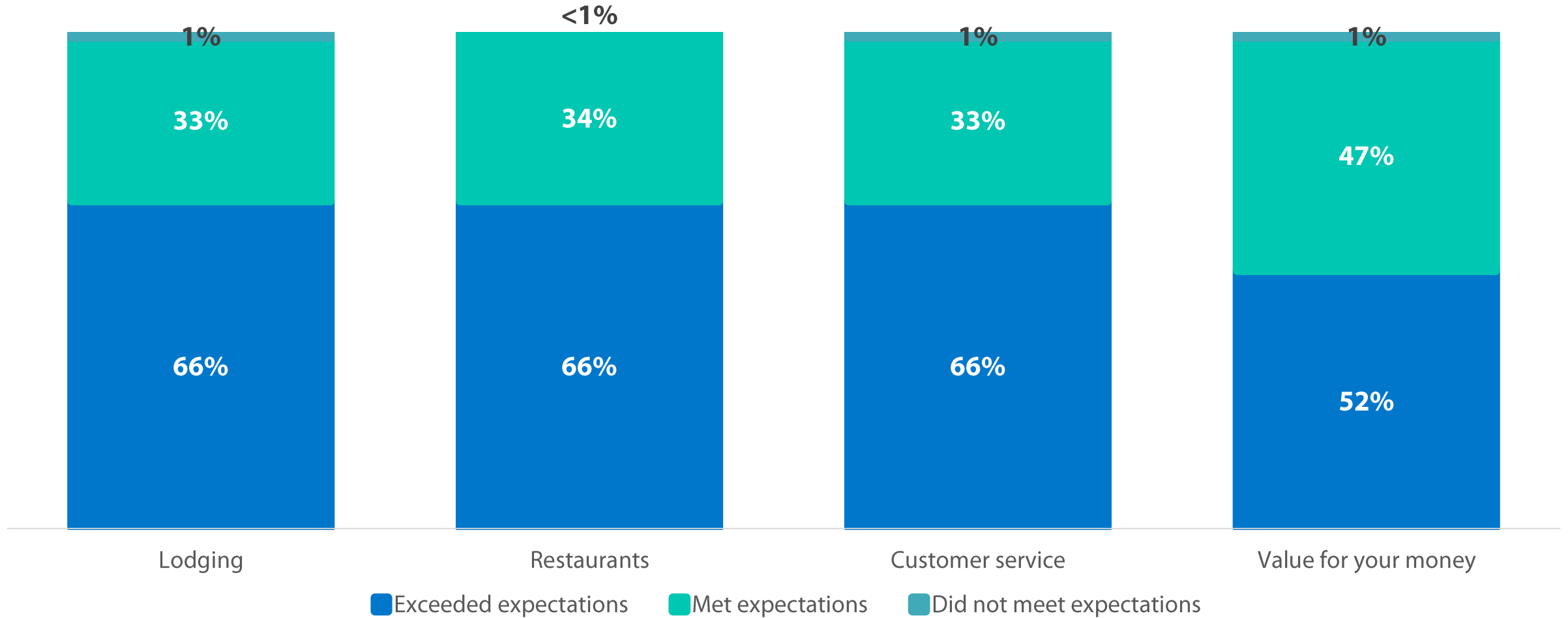
VISITOR SATISFACTION

- » **98%** of visitors were **satisfied** with their trip to Pensacola (98% in 2022)
- » **3 in 4** visitors were **very satisfied** with their trip to Pensacola (79% in 2022)
- » Of visitors who were only somewhat satisfied, reasons listed most often were:
 - » Weather
 - » Quality of accommodations



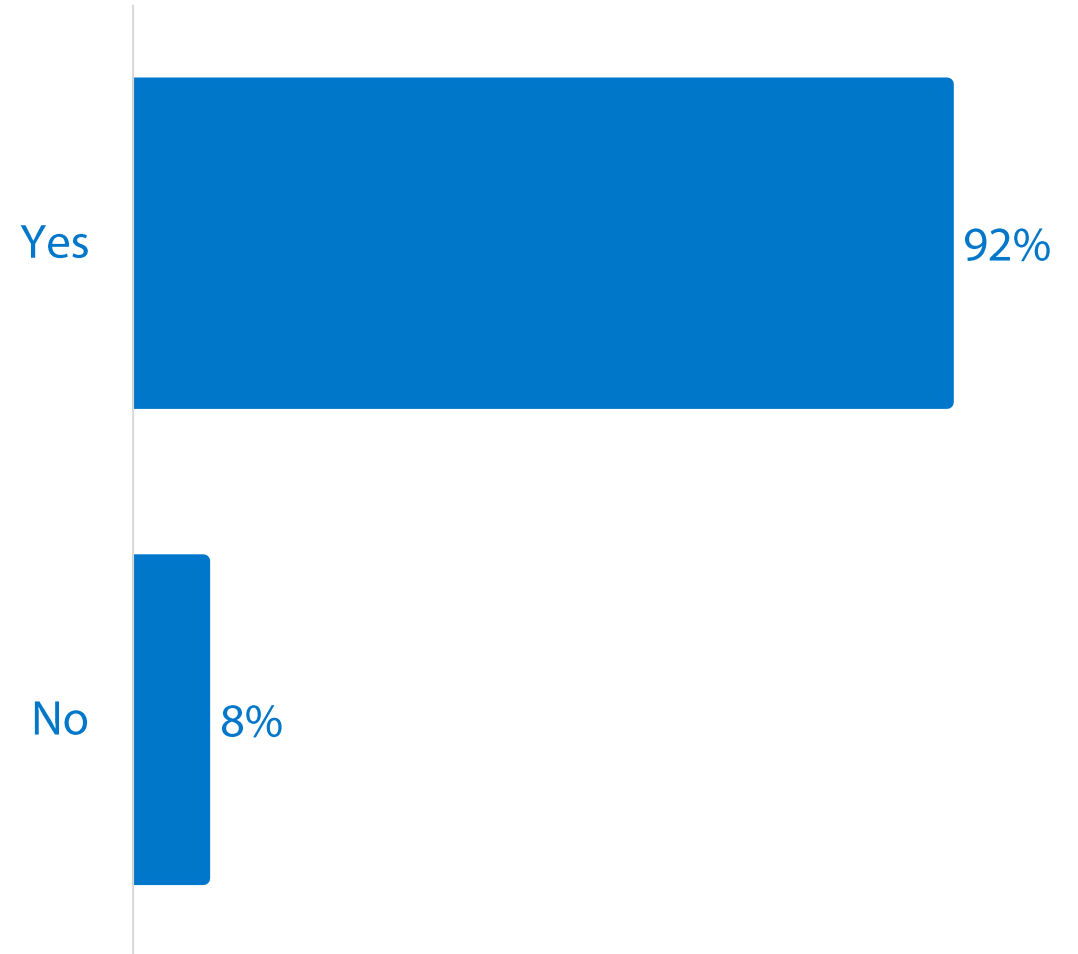
*Those who said somewhat satisfied were asked what features they liked least about the area.

SATISFACTION RATINGS



RECOMMENDATION

» **Over 9 in 10** visitors would recommend the Pensacola area to others (93% in 2022)



LIKELIHOOD OF RETURNING

- » **98%** of visitors would **return** to the Pensacola area (98% in 2022)
- » Nearly **3 in 4** visitors would **definitely return** to the Pensacola area (75% in 2022)
- » 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.

QUARTERLY COMPARISONS



VISITOR JOURNEY: ECONOMIC IMPACT



KEY PERFORMANCE INDICATORS¹

	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Visitors	509,200	456,500	781,300	758,200	2,505,200
Room nights	496,600	570,900	674,500	657,900	2,399,900
Direct spending	\$260,430,700	\$236,397,400	\$397,015,500	\$423,474,600	\$1,317,318,200

	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Occupancy ²	51.7%	60.5%	69.8%	64.9%	61.8%
Average Daily Rate ²	\$132.91	\$122.95	\$193.93	\$192.34	\$161.01
RevPAR	\$68.75	\$74.45	\$135.44	\$124.89	\$99.54
TDT ³	\$4,182,231	\$2,672,865	\$5,948,528	\$8,778,711	\$21,582,336

¹ Year end calculations utilized the vacation rental unit figure provided by the Department of Business and Professional Regulations. (DBPR) Quarterly metrics have been adjusted to reflect updated number of units used for year end calculations.

² Sources: Key Data, Smith Travel Research, and DBPR.

³ Source: Clerk & Comptroller Escambia County.

VISITOR JOURNEY: PRE-VISIT



TRIP PLANNING CYCLE

	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
A week or two	31%	30%	26%	27%	28%
A month or so	27%	25%	26%	25%	26%
2 months	15%	18%	19%	20%	18%
3 months	12%	12%	14%	13%	13%
4 to 5 months	6%	5%	8%	8%	7%
6 months or more	9%	10%	7%	7%	8%
Average Planning Cycle	56	57	58	57	57

ONLINE TRIP PLANNING SOURCES¹

	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Search sites (Google, etc.)	58%	67%	68%	69%	66%
Hotel websites/apps	26%	32%	27%	27%	28%
Vacation rental websites	20%	28%	28%	29%	27%
Personal social media	21%	21%	26%	18%	22%
Airline websites/apps	23%	27%	18%	21%	22%
VisitPensacola.com	11%	13%	12%	13%	12%
Trip planning website/app	11%	12%	12%	12%	12%
Online travel agency	10%	8%	13%	13%	12%
Pensacola social media	9%	8%	11%	6%	9%
Online travel reviews	4%	5%	6%	4%	5%
Video streaming services	2%	3%	5%	3%	3%
Music streaming services	2%	3%	4%	2%	3%
Other	12%	8%	6%	8%	8%

¹ Multiple responses permitted.

OTHER TRIP PLANNING SOURCES¹

	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Friends/family	34%	39%	32%	37%	35%
Brochures/travel guides/visitor guides	6%	9%	10%	11%	9%
AAA	2%	2%	4%	3%	3%
Travel magazines	1%	2%	3%	2%	2%
Travel agent	1%	2%	2%	3%	2%
Newspaper	1%	1%	2%	1%	1%
Television	1%	1%	2%	1%	1%
Radio	1%	1%	1%	2%	1%
Other	7%	6%	6%	8%	7%
None of the above	55%	48%	51%	46%	50%

¹ Multiple responses permitted.

VISITOR GUIDE

	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Requested a print version	1%	2%	3%	3%	2%
Viewed it online	12%	16%	16%	18%	16%
Did not request or view a Visitors Guide for Pensacola area	87%	82%	81%	79%	82%

REASON FOR VISITING¹

	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Beach	26%	24%	48%	50%	40%
Relax and unwind	32%	30%	41%	39%	37%
Visit friends/relatives	25%	21%	25%	25%	24%
Family time	14%	13%	16%	17%	15%
Attractions	10%	13%	17%	15%	14%
Restaurants	13%	13%	12%	11%	12%
Special occasion	9%	9%	13%	11%	11%
Special events	16%	12%	9%	6%	10%
Business meetings/conferences	8%	5%	4%	4%	5%
Art galleries/museums/etc.	4%	5%	4%	6%	5%
Water sports	2%	2%	6%	5%	4%
Shopping	6%	3%	4%	4%	4%
Bars/nightclubs	5%	4%	4%	4%	4%
State parks	3%	2%	3%	3%	3%
Biking/hiking/running/etc.	1%	2%	2%	2%	2%
Sporting event	1%	3%	1%	1%	1%
Golf/tennis	1%	1%	1%	1%	1%
Spas	0%	1%	2%	1%	1%
Other	14%	13%	14%	10%	13%

¹Three responses permitted.

ADVERTISING

Recalled Advertising	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Yes	19%	19%	23%	22%	21%
No	70%	72%	70%	68%	70%
Not sure	11%	9%	7%	10%	9%

Influenced by Advertising	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Yes	8%	8%	12%	11%	10%
No	10%	9%	10%	10%	10%
Not sure	1%	2%	1%	1%	1%
Have not recalled seeing advertising, promotions, or travel stories about the Pensacola area	81%	81%	77%	78%	79%

ADVERTISING SOURCES¹

	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Personal social media	25%	32%	41%	33%	34%
Television	35%	24%	28%	26%	28%
VisitPensacola.com	12%	19%	15%	20%	17%
Visit Pensacola social media	13%	16%	17%	18%	16%
Online article	11%	10%	11%	14%	12%
Radio	14%	10%	11%	7%	10%
Ad on a website	10%	10%	11%	10%	10%
Billboard	12%	8%	11%	7%	9%
Deal-based promotion	5%	9%	9%	10%	9%
Travel/visitor guide	5%	8%	9%	9%	8%
Rental agency/booking websites	2%	7%	7%	6%	6%
Brochure	4%	6%	4%	6%	5%
Weather app	5%	3%	6%	4%	5%
Traveler reviews/blogs	5%	6%	5%	6%	5%
Video streaming services	3%	5%	4%	5%	4%
Magazine ad	4%	3%	3%	6%	4%
Magazine article	4%	2%	4%	4%	4%
Newspaper	4%	3%	3%	3%	3%
AAA	1%	2%	4%	3%	3%
Music streaming services	2%	3%	1%	2%	2%
Other	6%	6%	5%	5%	5%

VISITOR JOURNEY: TRAVEL PARTY PROFILE



TOP VISITOR ORIGIN STATES & REGION¹

	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Southeast	45%	43%	48%	52%	48%
Florida	24%	19%	17%	14%	17%
Midwest	15%	21%	17%	16%	17%
Northeast	7%	8%	6%	6%	7%
West	6%	6%	8%	8%	7%
Int'l	3%	3%	4%	4%	4%

	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Florida	24%	19%	17%	14%	17%
Alabama	16%	13%	13%	14%	14%
Texas	6%	6%	7%	7%	7%
Georgia	5%	5%	7%	7%	6%
Louisiana	3%	4%	6%	7%	5%
Tennessee	5%	4%	5%	5%	5%
Mississippi	4%	3%	3%	4%	4%
Arkansas	1%	2%	2%	2%	2%
Illinois	2%	3%	2%	3%	2%
Indiana	2%	2%	2%	1%	2%

TOP VISITOR ORIGIN MARKETS¹

	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Mobile²	16%	18%	18%	15%	17%
Atlanta	4%	4%	6%	5%	5%
Birmingham	3%	2%	3%	3%	3%
Nashville	3%	3%	3%	3%	3%
New Orleans	2%	3%	3%	4%	3%
Chicago	1%	2%	2%	2%	2%
Dallas - Fort Worth	2%	2%	2%	3%	2%
Houston	2%	2%	2%	1%	2%
Panama City	2%	3%	1%	2%	2%
Baton Rouge	1%	1%	1%	1%	1%

¹ Based on data from Visitor Tracking, Arrivalist, and Zartico.
² Mobile DMA spans across Florida, Alabama, and Mississippi.

VISITOR PROFILE

	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Travel Party Size	2.7	2.9	3.3	3.2	3.1
Traveled with children	29%	34%	40%	37%	36%

	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Under 35	27%	29%	32%	28%	29%
35 to 49	33%	33%	35%	34%	34%
50 to 65	27%	25%	25%	28%	26%
Over 65	13%	13%	8%	10%	11%
Median Age	45	45	43	45	44

VISITOR PROFILE

Gender*	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Female	59%	60%	61%	59%	60%
Male	41%	40%	38%	41%	40%
Transgender/Non-conforming	<1%	<1%	1%	<1%	<1%

Income	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Less than \$50,000	23%	22%	21%	20%	21%
\$50,000 to \$99,000	36%	36%	40%	41%	39%
\$100,000 to \$149,000	21%	24%	23%	23%	23%
\$150,000 to \$199,000	12%	12%	10%	10%	11%
\$200,000 to \$399,000	6%	4%	4%	5%	4%
\$400,000+	2%	2%	2%	1%	2%
Median Income	\$87,500	\$88,900	\$86,300	\$86,600	\$87,200

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

NEW & RETURNING VISITORS

	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
This was my first time	22%	26%	30%	28%	27%
2-3	19%	19%	20%	22%	20%
4-5	13%	17%	15%	17%	15%
6-10	12%	13%	10%	12%	12%
11-20	8%	8%	8%	7%	8%
21+	26%	17%	17%	14%	18%

VISITOR JOURNEY: TRIP EXPERIENCE



TRANSPORTATION

	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Drive	84%	85%	82%	84%	84%
Pensacola Int'l Airport	14%	13%	16%	14%	14%
Mobile Regional Airport	1%	<1%	<1%	<1%	1%
Gulfport-Biloxi Int'l Airport	<1%	<1%	<1%	<1%	<1%
Northwest Florida Beaches International Airport	<1%	<1%	1%	<1%	<1%
Northwest Florida Regional Airport	1%	1%	1%	1%	1%
Other	<1%	1%	<1%	1%	<1%

ACCOMMODATIONS

	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Hotel/motel/resort	33%	36%	36%	35%	35%
Not spending the night	28%	22%	20%	19%	22%
Vacation rental home*	16%	21%	26%	23%	22%
Friends/family home	16%	12%	10%	13%	12%
Campground/RV Park	4%	5%	4%	5%	4%
Personal second home	3%	3%	3%	3%	3%
Bed & Breakfast/Inn	<1%	<1%	1%	1%	1%
Marina	<1%	<1%	<1%	<1%	<1%
Other	<1%	1%	<1%	1%	<1%
Average Length of Stay	4.7	5.4	4.2	4.3	4.5

ACCOMMODATION BOOKING

	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Directly with the hotel/condo	54%	53%	47%	45%	49%
Airbnb	18%	20%	19%	22%	20%
Online travel agency	15%	12%	18%	16%	16%
VRBO, Homeaway	6%	7%	9%	9%	8%
Vacation rental company	2%	4%	5%	5%	4%
Other	5%	4%	2%	3%	3%

VISITOR ACTIVITIES¹

	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Restaurants	79%	84%	82%	80%	81%
Relax and unwind	72%	79%	77%	76%	76%
Beach	63%	64%	75%	79%	72%
Shopping	43%	49%	41%	42%	43%
Family time	35%	41%	36%	37%	37%
Visit friends/relatives	38%	36%	32%	33%	34%
Attractions	25%	37%	36%	35%	34%
Art galleries/museums/etc.	25%	33%	31%	27%	29%
Bars/nightclubs	28%	26%	26%	24%	26%
Water sports	13%	15%	31%	27%	23%
State parks	18%	24%	21%	21%	21%
Special events	27%	28%	20%	14%	21%
Biking/hiking/running/etc.	14%	23%	21%	17%	19%
Special occasion	15%	14%	14%	13%	14%
Golf/tennis	5%	8%	8%	9%	8%
Business meetings/conferences	9%	5%	5%	5%	5%
Spas	4%	4%	6%	5%	5%
Sporting event	2%	7%	4%	4%	4%
Other	10%	7%	10%	7%	9%

¹ Multiple responses permitted.

DAILY TRAVEL PARTY SPEND

	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Accommodations	\$71	\$77	\$136	\$130	\$111
Restaurants	\$78	\$89	\$101	\$96	\$93
Groceries	\$13	\$19	\$24	\$19	\$19
Shopping	\$40	\$41	\$47	\$32	\$40
Entertainment	\$34	\$35	\$58	\$44	\$45
Transportation	\$22	\$21	\$30	\$29	\$27
Other	\$4	\$4	\$4	\$1	\$3
Total Daily Spend	\$262	\$286	\$400	\$351	\$337

TOTAL TRAVEL PARTY SPEND

	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Accommodations	\$334	\$416	\$548	\$533	\$477
Restaurants	\$367	\$481	\$433	\$409	\$421
Groceries	\$61	\$103	\$107	\$82	\$89
Shopping	\$188	\$221	\$191	\$142	\$181
Entertainment	\$160	\$189	\$248	\$198	\$204
Transportation	\$103	\$113	\$119	\$138	\$121
Other	\$19	\$22	\$24	\$4	\$16
Total Trip Spend	\$1,232	\$1,545	\$1,670	\$1,506	\$1,509

VISITOR JOURNEY: POST-TRIP



SATISFACTION

	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Very satisfied	75%	78%	74%	74%	75%
Satisfied	23%	21%	24%	24%	23%
Somewhat satisfied*	2%	1%	2%	2%	2%
Dissatisfied*	0%	0%	0%	0%	0%
Very dissatisfied*	0%	0%	0%	0%	0%

	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Definitely will return	77%	76%	71%	70%	73%
Probably will return	21%	23%	27%	28%	25%
Probably will not return**	2%	1%	2%	2%	2%
Definitely will not return**	0%	0%	0%	0%	0%

*Those who said somewhat satisfied were asked what features they liked least about the area.

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

SATISFACTION RATINGS

Exceeded Expectations	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Lodging	62%	70%	65%	68%	66%
Restaurants	63%	70%	65%	67%	66%
Customer service	60%	69%	66%	69%	66%
Value for your money	49%	54%	51%	55%	52%

Would Recommend	Oct - Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul - Sep 2023	FY2023
Yes	91%	94%	91%	93%	92%
No	9%	6%	9%	7%	8%

YEARLY COMPARISONS



VISITOR JOURNEY: ECONOMIC IMPACT



KEY PERFORMANCE INDICATORS

	FY2022	FY2023	% Δ
Visitors	2,509,100	2,505,200	- 0.2%
Room nights	2,461,500	2,399,900	- 2.5%
Direct spending	\$1,309,013,600	\$1,317,318,200	+ 0.6%
Economic Impact	\$2,011,337,500	\$2,028,670,100	+ 0.9%

	FY2022	FY2023	% Δ
Occupancy ¹	68.0%	61.8%	-9.1%
Average Daily Rate ¹	\$167.35	\$161.01	-3.8%
RevPAR	\$113.81	\$99.54	-12.5%
TDT ²	\$21,816,411	\$21,582,336	-1.1%

¹ Sources: Key Data, Smith Travel Research, and DBPR.

² Source: Clerk & Comptroller Escambia County.

VISITOR JOURNEY: PRE-VISIT



TRIP PLANNING CYCLE

	FY2022	FY2023	Δ
A week or two	28%	28%	-
A month or so	26%	26%	-
2 months	16%	18%	+2.0%
3 months	13%	13%	-
4 to 5 months	7%	7%	-
6 months or more	10%	8%	-2.0%
Average Planning Cycle	59	57	- 2

ONLINE TRIP PLANNING SOURCES¹

	FY2022	FY2023	Δ
Search sites (Google, etc.)	67%	66%	-1%
Hotel websites/apps	31%	28%	-3%
Vacation rental websites	25%	27%	+2%
Personal social media	19%	22%	+3%
Airline websites/apps	24%	22%	-2%
VisitPensacola.com	14%	12%	-2%
Online travel agency	15%	12%	-3%
Trip planning website/app	17%	12%	-5%
Pensacola social media	11%	9%	-2%
Online travel reviews	6%	5%	-1%
Video streaming services	4%	3%	-1%
Music streaming services	4%	3%	-1%
Other	8%	8%	-

OTHER TRIP PLANNING SOURCES¹

	FY2022	FY2023	Δ
Friends/family	36%	35%	-1%
Brochures/travel guides/visitor guides	9%	9%	-
AAA	4%	3%	-1%
Travel magazines	3%	2%	-1%
Travel agent	3%	2%	-1%
Newspaper	2%	1%	-1%
Television	2%	1%	-1%
Radio	2%	1%	-1%
Other	10%	7%	-3%
None of the above	46%	50%	+4%

VISITOR GUIDE

	FY2022	FY2023	Δ
Requested a print version	3%	2%	-1%
Viewed it online	19%	16%	-3%
Did not request or view a Visitors Guide for Pensacola area	78%	82%	+4%

REASON FOR VISITING¹

	FY2022	FY2023	Δ
Beach	37%	40%	+3%
Relax and unwind	40%	37%	-3%
Visit friends/relatives	19%	24%	+5%
Family time	10%	15%	+5%
Attractions	9%	14%	+5%
Restaurants	9%	12%	+3%
Special occasion	14%	11%	-3%
Special events	13%	10%	-3%
Business meetings/conferences	7%	5%	-2%
Art galleries/museums/etc.	4%	5%	+1%
Water sports	5%	4%	-1%
Shopping	4%	4%	-
Bars/nightclubs	4%	4%	-
State parks	3%	3%	-
Biking/hiking/running/etc.	3%	2%	-1%
Sporting event	3%	1%	-2%
Golf/tennis	2%	1%	-1%
Spas	1%	1%	-
Other	15%	13%	-2%

¹ Multiple responses permitted.

ADVERTISING

Recalled Advertising	FY2022	FY2023	Δ
Yes	20%	21%	+1%
No	70%	70%	-
Not sure	10%	9%	-1%

Influenced by Advertising	FY2022	FY2023	Δ
Yes	10%	10%	-
No	9%	10%	+1%
Not sure	1%	1%	-
Have not recalled seeing advertising, promotions, or travel stories about the Pensacola area	80%	79%	-1%

ADVERTISING SOURCES¹

	FY2022	FY2023	Δ
Personal social media	26%	34%	+8%
Television	30%	28%	-2%
VisitPensacola.com	16%	17%	+1%
Visit Pensacola social media	17%	16%	-1%
Online article	14%	12%	-2%
Radio	13%	10%	-3%
Ad on a website	11%	10%	-1%
Billboard	12%	9%	-3%
Deal-based promotion	6%	9%	+3%
Travel/visitor guide	9%	8%	-1%
Rental agency/booking websites	7%	6%	-1%
Brochure	5%	5%	-
Weather app	5%	5%	-
Traveler reviews/blogs	7%	5%	-2%
Video streaming services	4%	4%	-
Magazine ad	4%	4%	-
Magazine article	4%	4%	-
Newspaper	4%	3%	-1%
AAA	3%	3%	-
Music streaming services	3%	2%	-1%
Other	6%	5%	-1%

¹ Multiple responses permitted.

VISITOR JOURNEY: TRAVEL PARTY PROFILE



TOP VISITOR ORIGIN STATES & REGION¹

	FY2022	FY2023	Δ
Southeast	45%	48%	+3%
Midwest	20%	17%	-3%
Florida	16%	17%	+1%
Northeast	8%	7%	-1%
West	8%	7%	-1%
Int'l	3%	4%	+1%

	FY2022	FY2023	Δ
Florida	16%	17%	+1%
Alabama	11%	14%	+3%
Texas	8%	7%	-1%
Georgia	5%	6%	+1%
Louisiana	4%	5%	+1%
Tennessee	5%	5%	-
Mississippi	3%	4%	+1%
Arkansas	1%	2%	+1%
Illinois	3%	2%	-1%
Indiana	2%	2%	-

¹ Based on data from Visitor Tracking, Arrivalist, and Zartico.

TOP VISITOR ORIGIN MARKETS¹

	FY2022	FY2023	Δ
Mobile²	13%	17%	+4%
Atlanta	4%	5%	+1%
Birmingham	3%	3%	-
Nashville	3%	3%	-
New Orleans	3%	3%	-
Chicago	2%	2%	-
Dallas - Fort Worth	3%	2%	-1%
Houston	2%	2%	-
Panama City	1%	2%	+1%

¹ Based on data from Visitor Tracking, Arrivalist, and Zartico.
² Mobile DMA spans across Florida, Alabama, and Mississippi.

VISITOR PROFILE

	FY2022	FY2023	Δ
Travel Party Size	3.1	3.1	-
Traveled with children	36%	36%	-

	FY2022	FY2023	Δ
Under 35	28%	29%	+1%
35 to 49	35%	34%	-1%
50 to 65	27%	26%	-1%
Over 65	10%	11%	+1%
Median Age	44	44	-

VISITOR PROFILE

Gender*	FY2022	FY2023	Δ
Female	57%	60%	+3%
Male	42%	40%	-2%
Transgender/Non-conforming	1%	<1%	-1%
Income	FY2022	FY2023	Δ
Less than \$50,000	20%	21%	+1%
\$50,000 to \$99,000	39%	39%	-
\$100,000 to \$149,000	23%	23%	-
\$150,000 to \$199,000	11%	11%	-
\$200,000 to \$399,000	5%	4%	-1%
\$400,000+	2%	2%	-
Median Income	\$88,500	\$87,200	-\$1,300

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

NEW & RETURNING VISITORS

	FY2022	FY2023	Δ
This was my first time	30%	27%	-3%
2-3	21%	20%	-1%
4-5	15%	15%	-
6-10	11%	12%	+1%
11-20	7%	8%	+1%
21+	16%	18%	+2%

VISITOR JOURNEY: TRIP EXPERIENCE



TRANSPORTATION

	FY2022	FY2023	Δ
Drive	83%	84%	+ 1%
Pensacola Int'l Airport	15%	14%	- 1%
Northwest Florida Regional Airport	1%	1%	–
Mobile Regional Airport	<1%	1%	+1%
Northwest Florida Beaches International Airport	1%	<1%	- 1%
Gulfport-Biloxi Int'l Airport	<1%	<1%	–
Other	<1%	<1%	–

ACCOMMODATIONS

	FY2022	FY2023	Δ
Hotel/motel/resort	38%	35%	-3%
Not spending the night	20%	22%	+2%
Vacation rental home*	21%	22%	+1%
Friends/family home	13%	12%	-1%
Campground/RV Park	3%	4%	+1%
Personal second home	4%	3%	-1%
Bed & Breakfast/Inn	1%	1%	-
Marina	<1%	<1%	-
Other	<1%	1%	+1%
Average Length of Stay	4.8	4.5	- 0.3

ACCOMMODATION BOOKING

	FY2022	FY2023	Δ
Directly with the hotel/condo	50%	49%	-1%
Airbnb	18%	20%	+2%
Online travel agency	16%	16%	-
VRBO, Homeaway	8%	8%	-
Vacation rental company	5%	4%	-1%
Other	3%	3%	-

VISITOR ACTIVITIES¹

	FY2022	FY2023	Δ
Restaurants	83%	81%	-2%
Relax and unwind	76%	76%	-
Beach	70%	72%	+2%
Shopping	49%	43%	-6%
Family time	31%	37%	+6%
Visit friends/relatives	35%	34%	-1%
Attractions	30%	34%	+4%
Art galleries/museums/etc.	31%	29%	-2%
Bars/nightclubs	29%	26%	-3%
Water sports	21%	23%	+2%
State parks	20%	21%	+1%
Special events	20%	21%	+1%
Biking/hiking/running/etc.	22%	19%	-3%
Special occasion	13%	14%	+1%
Golf/tennis	8%	8%	-
Business meetings/conferences	7%	5%	-2%
Spas	4%	5%	+1%
Sporting event	4%	4%	-
Other	10%	9%	-1%

¹ Multiple responses permitted.

DAILY TRAVEL PARTY SPEND

	FY2022	FY2023	Δ
Accommodations	\$125	\$111	-\$14
Restaurants	\$94	\$93	-\$1
Groceries	\$17	\$19	\$2
Shopping	\$39	\$40	\$1
Entertainment	\$42	\$45	\$3
Transportation	\$26	\$26	\$0
Other	\$2	\$3	\$1
Total Daily Spend	\$345	\$337	-\$8

TOTAL TRAVEL PARTY SPEND

	FY2022	FY2023	Δ
Accommodations	\$541	\$477	-\$64
Restaurants	\$446	\$421	-\$25
Groceries	\$79	\$89	\$10
Shopping	\$188	\$181	-\$7
Entertainment	\$197	\$204	\$7
Transportation	\$123	\$121	-\$2
Other	\$7	\$16	\$9
Total Trip Spend	\$1,581	\$1,509	-\$72

VISITOR JOURNEY: POST-TRIP



SATISFACTION

	FY2022	FY2023	Δ
Very satisfied	79%	75%	-4%
Satisfied	19%	23%	+4%
Somewhat satisfied*	2%	2%	-
Dissatisfied*	0%	0%	-
Very dissatisfied*	0%	0%	-

	FY2022	FY2023	Δ
Definitely will return	75%	73%	-2%
Probably will return	23%	25%	+2%
Probably will not return**	2%	2%	-
Definitely will not return**	0%	0%	-

*Those who said somewhat satisfied were asked what features they liked least about the area.

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

SATISFACTION RATINGS

Exceeded Expectations	FY2022	FY2023	Δ
Lodging	60%	66%	+ 6%
Restaurants	59%	66%	+ 7%
Customer service	58%	66%	+ 8%
Value for your money	49%	52%	+ 3%

Would Recommend	FY2022	FY2023	Δ
Yes	93%	92%	- 1%
No	7%	8%	+ 1%



Data Collection

4,422 interviews were completed with visitors to the Pensacola area in-person and online at events, the airport, the beach, and downtown between October 1, 2022 and September 30, 2023.

Economic Impact

Total economic impact is a function of direct spending by visitors in the Pensacola area, as well as the indirect and induced effects of this spending, such as increased business and household spending generated by tourism dollars.

Multiplier

Downs & St. Germain Research uses IMPLAN economic modeling to calculate the multiplier based on direct expenditure data collected from visitors to the Pensacola area. Agencies such as FEMA, EPA, Federal Reserve bank, and the Bureau of Land Management use IMPLAN modeling. Pensacola's multiplier is 1.54.

VISIT PENSACOLA

Visitor Tracking Study
FY2023

October 2022 – September 2023

Downs & St. Germain Research
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