VISIT PENSACOLA

Economic Impact & Visitor Tracking Study

FISCAL YEAR 2025

OCTOBER 2024 – SEPTEMBER 2025

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METHODOLOGY

DATA COLLECTION

Interviews were completed in-person and online with **4,441** visitors between **October 1, 2024 and September 30, 2025**.

In-person surveying location included:

- Downtown Pensacola
- The Historic Village
- Pensacola Beach
- Perdido Key
- Pensacola International Airport
- Pensacola Lighthouse
- National Aviation Museum
- Veterans Memorial Park
- Events

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.

The economic impact analysis process has been updated to align more closely with current IMPLAN data models. As a result, previous years' figures have been revised using the updated methodology. IMPLAN models are based on government data sources (e.g., BEA, BLS, Census, etc.) that lag behind this report's calendar year, therefore future updates may occur as newer datasets become available. This Economic Impact analysis accounts for leakage outside of Escambia County (i.e., the cost of wholesale and retail trade services that do not continue to circulate within the county's economy).

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 1.53.

EXECUTIVE SUMMARY

KEY PERFORMANCE INDICATORS

	2,492,500	2,503,400	$1,345,497,200	$1,782,317,400	$22,048,835
	TOTAL VISITORS[1]	ROOM NIGHTS[2]	DIRECT SPENDING	ECONOMIC IMPACT	TOURISM DEVELOPMENT TAX[3]
vs. FY 2024	↓ 2.8%	↑ 0.8%	↑ 1.8%	↑ 3.1%	↑ 0.1%

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[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: Smith Travel Research, Key Data, and Department of Business and Professional Regulation.

[3] Sources: Clerk & Comptroller Escambia County.

LODGING METRICS

[1] Source: Smith Travel Research.
[2] Source: Key Data and Department of Business and Professional Regulation (DBPR).

COMBINED

61.1%	$159.88	$97.61
OCCUPANCY	AVERAGE DAILY RATE	REVENUE PER AVAILABLE ROOM
↑ 0.4%	↑ 1.4%	↑ 1.8%

HOTELS[1]

	62.6%	$138.66	$86.84
	OCCUPANCY	AVERAGE DAILY RATE	REVENUE PER AVAILABLE ROOM
vs. FY 2024	0.0%	↑ 1.3%	↑ 1.2%

VACATION RENTALS[2]

54.4%	$235.51	$128.15
OCCUPANCY	AVERAGE DAILY RATE	REVENUE PER AVAILABLE ROOM
↓ 0.9%	↑ 3.2%	↑ 2.3%

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.

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RESEARCH

ANNUAL SNAPSHOT: FISCAL YEAR 2025

Direct spending increased slightly (+1.8%) compared to FY 2024 despite a **shorter length of stay** (4.2 vs 4.3 in FY 2024) and decrease in visitation.

Smaller travel party sizes (2.8 vs 3.0 in FY 2024) and fewer visitors staying with friends/relatives or in a personal second home contributed to the **decrease in overall visitation** (-2.8%).

With a slight increase in lodging **occupancy** (+0.4%) and **ADR** (+1.4%), **RevPAR** was up **+1.8%** compared to FY 2024. **Accommodation units** also saw a slight increase (+0.4%), leading to an increase in **room nights** (+0.8%) and **TDT** (+0.1%).

Visitors have a **longer trip planning window** of about **61 days** in advance (+4 days).

Consistent with last year, the **top trip planning sources** were **search sites** and **friends/family**. According to Phocuswright, this aligns with national trends as friends/family, general search, and online travel agencies are the most relied upon resources. More visitors utilized **VisitPensacola.com** (+4% points) and **friends/family** (+5% points) to plan their trip.

Visitors were more likely to view the **Visitor Guide** online (+6% points) prior to visiting the Pensacola area.

Consistent with last year, the **main reasons for visiting** to the Pensacola area included going to the **beach**, **relaxing and unwinding**, and **visiting friends/relatives**.

More visitors **recalled advertising** about the Pensacola area (+7% points). Top ad recall sources included VisitPensacola.com, personal social media, and television. Compared to FY 2024, visitors were more likely to see an ad on **VisitPensacola.com** (+11% points), **traveler reviews/blogs** (+7% points), **rental agencies/booking websites** (+6% points), and **weather apps** (+5% points). Advertising influenced **17% of all visitors** to come to the Pensacola area (+5% points).

There was an increase in visitors from the **Southeast** (+6% points), not including Florida, specifically from Alabama, Louisiana, and Mississippi. Mobile remains the top market.

Nearly half of visitors **traveled with children** under the age of 20 (+5% points). According to Hilton, 70% of global travelers who travel with children pick the destination based on the kids' needs/interests.

While there was a decrease in first time visitors (-4% points), there was an **increase in repeat visitors** as **31%** have visited the Pensacola area more than 10 times (+5% points).

The top visitor activities remained the same as visitors enjoy **dining out**, **relaxing and unwinding**, **visiting the beach**, and **shopping**. More visitors engaged in **shopping** (+10% points), **bars/nightclubs** (+6% points), and **special events** (+6% points) while visiting the Pensacola area.

ECONOMIC IMPACT

DIRECT SPENDING

Visitors to the Pensacola area spent

$1,345,497,200

on accommodations, restaurants, groceries, transportation, attractions, entertainment, and shopping

An increase of **+1.8%** from FY2024

ECONOMIC IMPACT

Visitor spending generated a total economic impact[1] of

$1,782,317,400

in the Pensacola area

An increase of **+3.1%** from FY2024

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[1] The economic impact analysis process has been updated to align more closely with current IMPLAN data models. As a result, previous years' figures have been revised using the updated methodology. This Economic Impact analysis accounts for leakage outside of Escambia County (i.e., the cost of wholesale and retail trade services that do not continue to circulate within the county's economy).

VISITORS

Pensacola attracted

2,492,500

visitors

A decrease of **-2.8%** from FY2024

ROOM NIGHTS

Pensacola visitors generated

2,503,400

room nights[1] in paid accommodations

An increase of **+0.8%** from FY2024

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[1] Sources: Smith Travel Research, Key Data, and Department of Business and Professional Regulation.

JOBS & WAGES

Tourism in the Pensacola area supported

13,510

local jobs in FY2025, supporting

$524,428,100

in wages and salaries

TOURISM DEVELOPMENT TAX

Lodging expenditures by visitors to the Pensacola area in FY2025 generated

$22,048,835

in TDT collected

An increase of **+0.1%** from FY2024

LOCAL TAX CONTRIBUTIONS BY VISITORS

Visitors to the Pensacola area in FY2025 contributed

$57,382,300

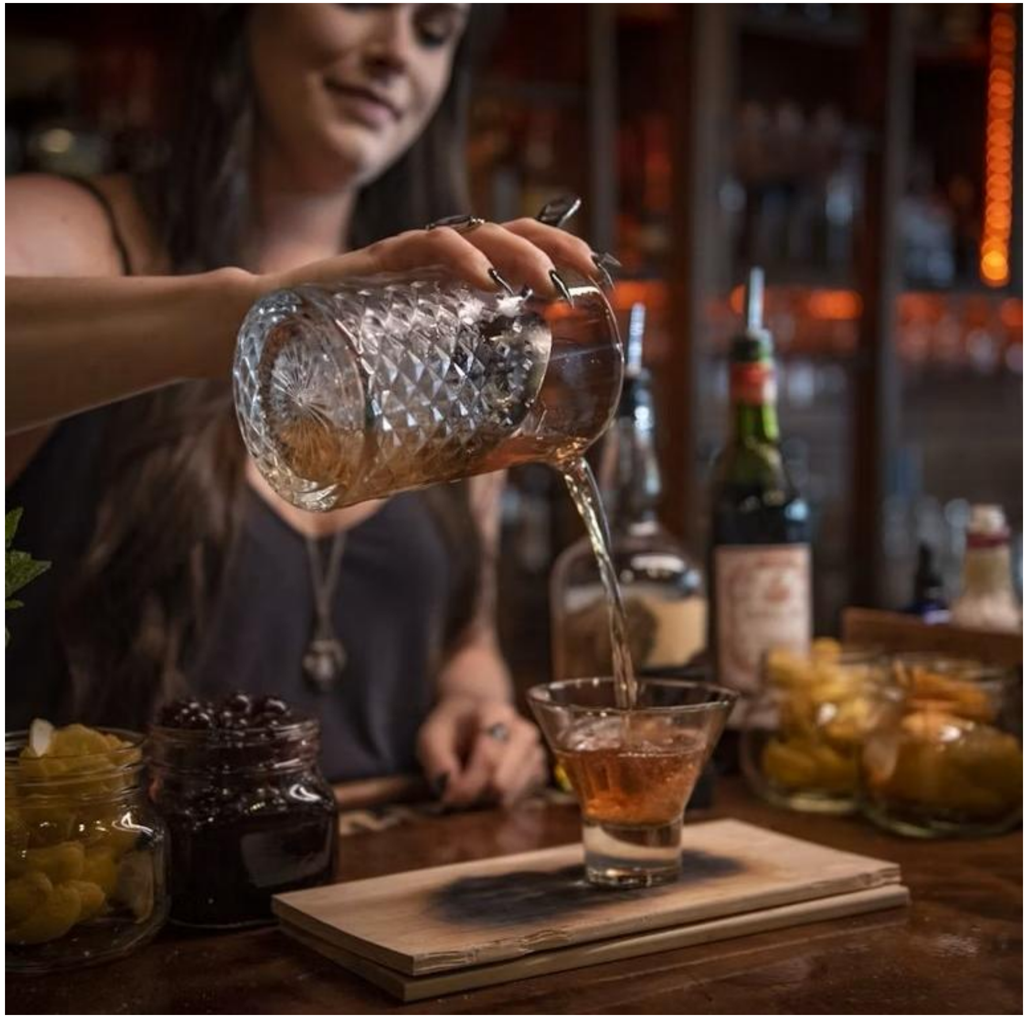
in local taxes to Escambia County

VISITORS SUPPORT JOBS

An additional Pensacola area job is supported by every

184

visitors



HOUSEHOLD SAVINGS

Visitors to the Pensacola area save residents

$453

in local taxes per household each year

VISITOR PROFILE SUMMARY

VISITOR PROFILE

24%
Viewed Visitor Guide

82%
Drove

23%
First-time Visitor

47%
Traveled with children[1]

2.8
Travel Party Size[2]

4.2
Length of Stay[2]

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[1] Children are defined as people under 20 years old.
[2] Includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.

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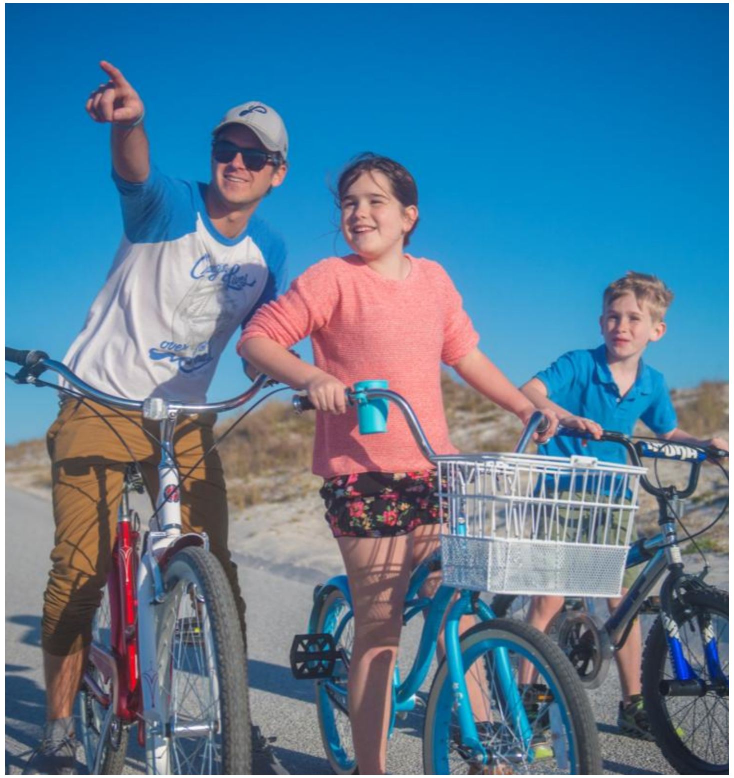
VISITOR TYPE

Paid accommodations[1]

62%

(61% in FY 2024)



Day trippers

23%

(23% in FY 2024)

Nonpaid accommodations[2]

15%

(16% in FY 2024)

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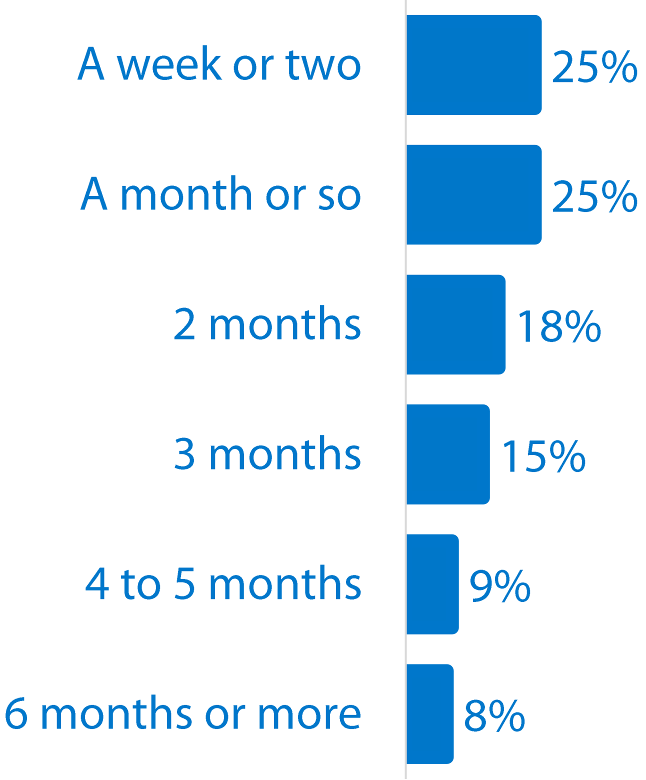
[1] Visitors staying in a hotel/motel/resort, rental condo/vacation rental home, or campground/RV park.

[2] Visitors staying with friends/family or in a personal second home.

TRIP PLANNING CYCLE

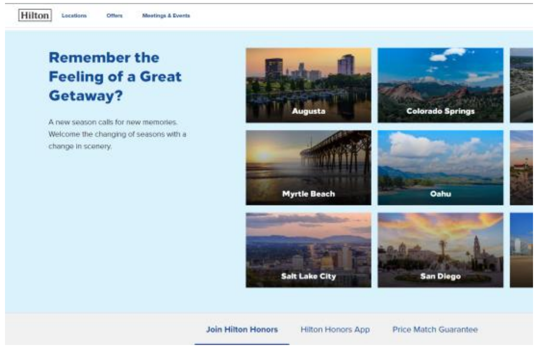
- Visitors to Pensacola have short trip planning windows, as **half** of visitors planned their trip to the Pensacola area **a month or less in advance** (54% in FY 2024)
- **1 in 3** visitors planned their trips **2-3 months in advance** (32% in FY 2024)
- Average trip planning cycle began **61 days** before the trip (56 days in FY 2024)



TOP TRIP PLANNING SOURCES[1]

Search sites
74%
(73% in FY 2024)

Friends/family
42%
(37% in FY 2024)



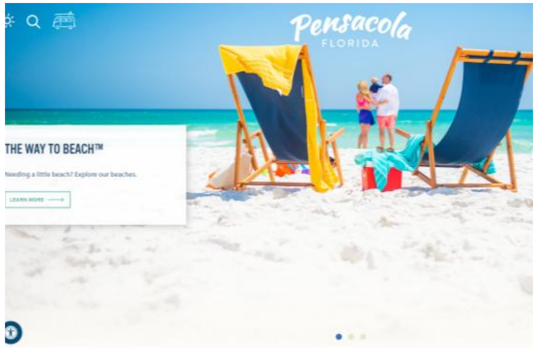
Remember the Feeling of a Great Getaway?

A new season calls for new memories. Welcome the changing of seasons with a change in scenery.

Hotel websites/apps
29%
(26% in FY 2024)

Vacation rental websites
24%
(25% in FY 2024)

Airline websites/apps
23%
(22% in FY 2024)



Needing a little beach? Explore our beaches.

VisitPensacola.com
21%
(17% in FY 2024)

Personal social media
20%
(19% in FY 2024)

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[1] Multiple responses permitted.

TOP REASONS FOR VISITING[1]

Beach
41%
(38% in FY 2024)

Relax and unwind
33%
(34% in FY 2024)

Visit friends/relatives
25%
(23% in FY 2024)

Special occasion
16%
(14% in FY 2024)

Special events
13%
(10% in FY 2024)

Family time
12%
(13% in FY 2024)

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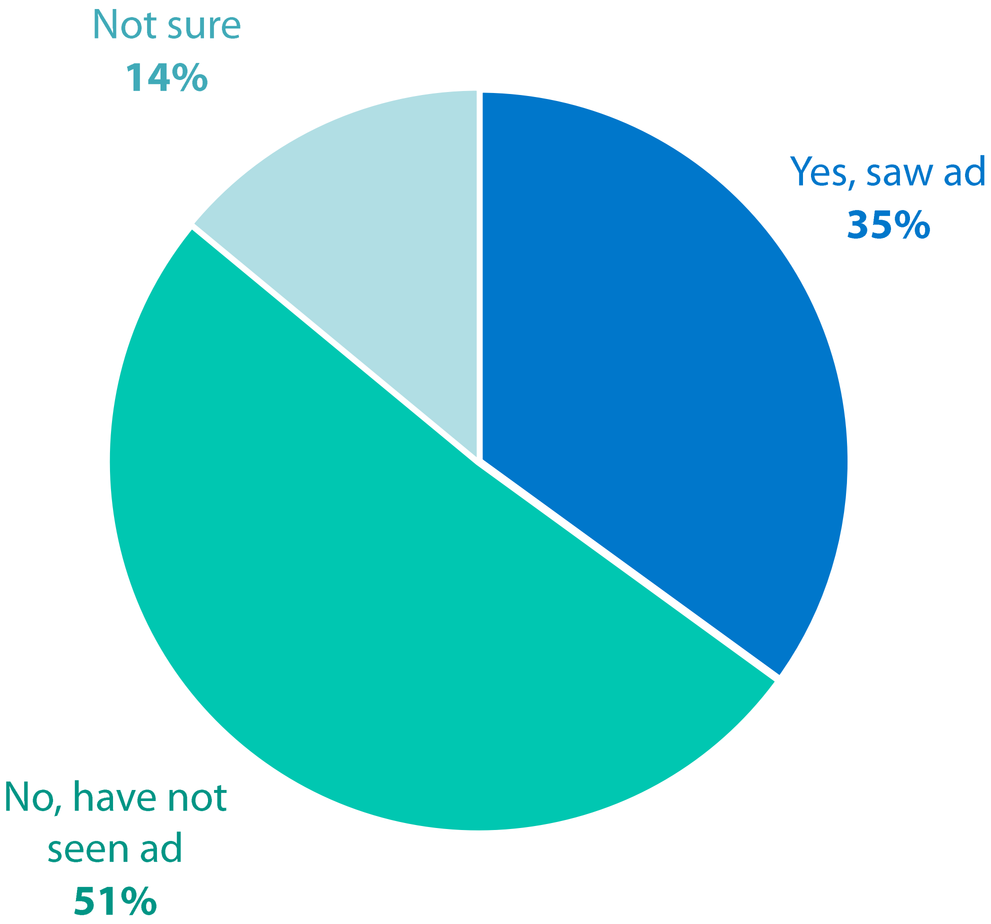
[1] Up to three responses permitted

ADVERTISING RECALL[1]

- **Over 1 in 3** visitors **recalled advertising** about the Pensacola area (28% in FY 2024)
- **17%** of **all visitors** were influenced by an ad to visit the Pensacola area (12% in FY 2024)

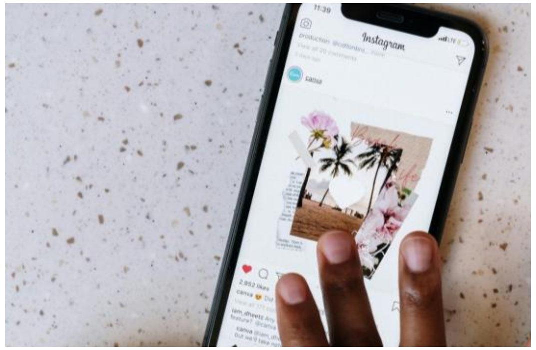


[1] Note: These figures are topline and solely relies on the memory of each visitor even though various other factors go into the influence of advertising.

TOP SOURCES OF AD RECALL[1]

Base: **35%** of visitors who recalled advertising

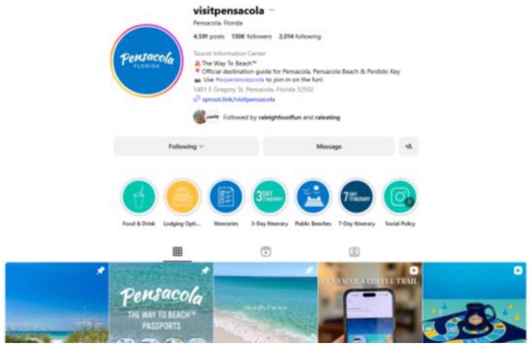
VisitPensacola.com
34%
(23% in FY 2024)



Personal social media
30%
(30% in FY 2024)

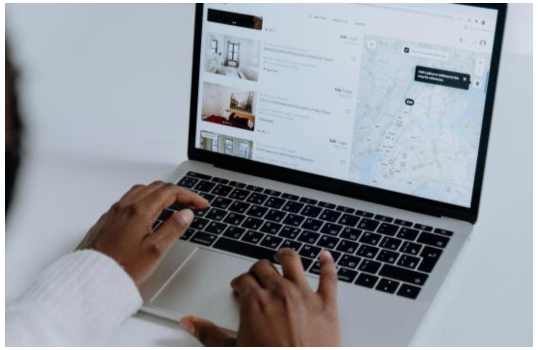
Television
23%
(25% in FY 2024)

Weather app
15%
(10% in FY 2024)



Visit Pensacola social media
14%
(13% in FY 2024)

Traveler reviews/blogs
14%
(7% in FY 2024)

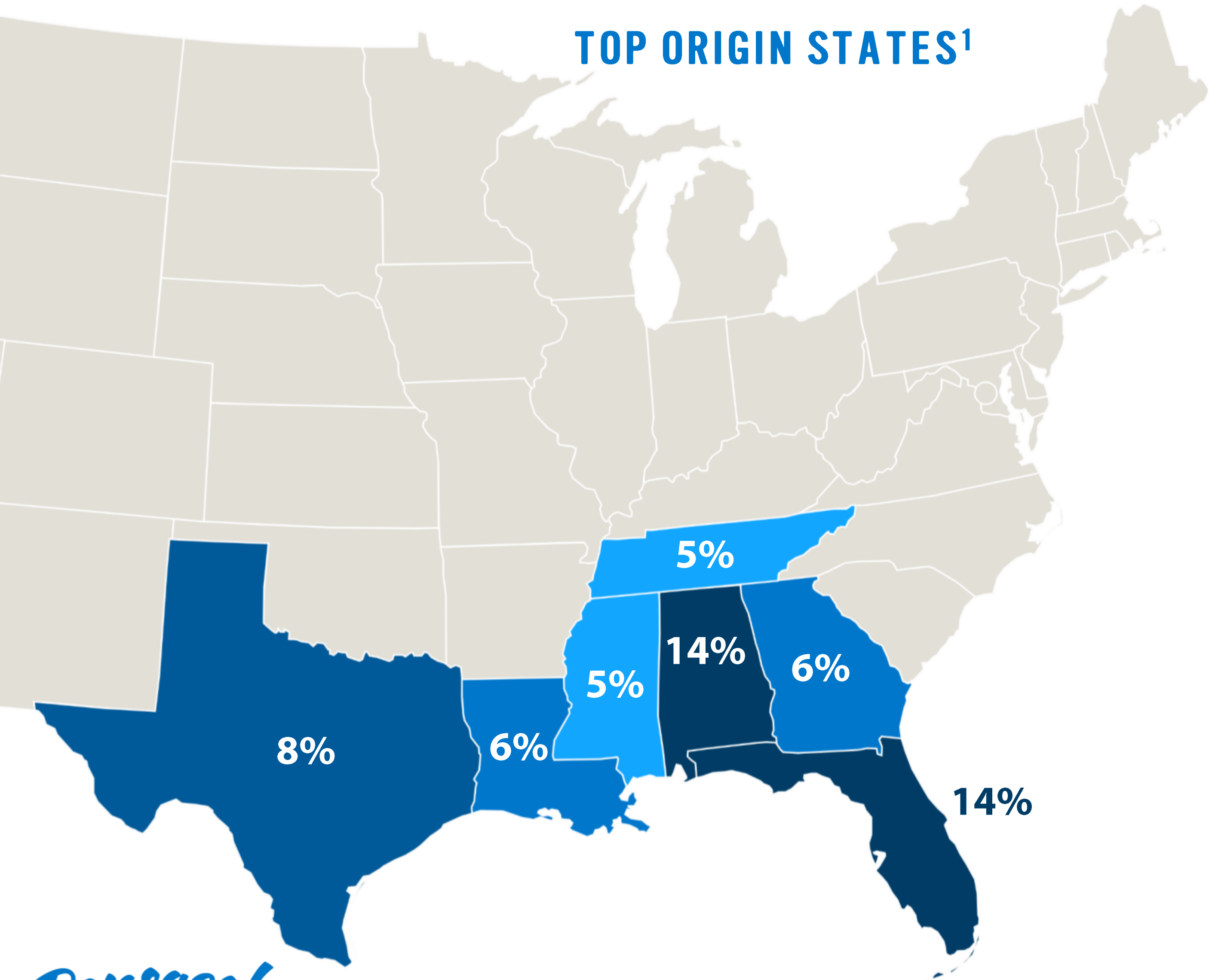


Rental agency/booking websites
12%
(6% in FY 2024)

[1] Multiple responses permitted.

VISITOR ORIGIN

TOP ORIGIN STATES[1]



MARKETS	2025[1]
Mobile[2]	15%
Atlanta	4%
New Orleans	3%
Birmingham	3%
Nashville	3%
Dallas – Fort Worth	3%
Houston	2%
Montgomery	2%

The **2%** of visitors who traveled **internationally** to the Pensacola area came mostly from Ontario, the United Kingdom, Germany, and France.

[1] Sources: Zartico and Visitor Tracking Study.
[2] Mobile DMA spans across Florida, Alabama, and Mississippi.

TOP ACTIVITIES DURING VISIT[1]

Restaurants
84%
(84% in FY 2024)

Relax and unwind
76%
(74% in FY 2024)

Beach
72%
(73% in FY 2024)

Shopping
49%
(39% in FY 2024)

Art galleries/museums
36%
(35% in FY 2024)

Attractions
36%
(32% in FY 2024)

Visit friends/relatives
34%
(32% in FY 2024)

Family time
33%
(35% in FY 2024)

Bars/nightclubs
32%
(26% in FY 2024)

Special events
25%
(19% in FY 2024)

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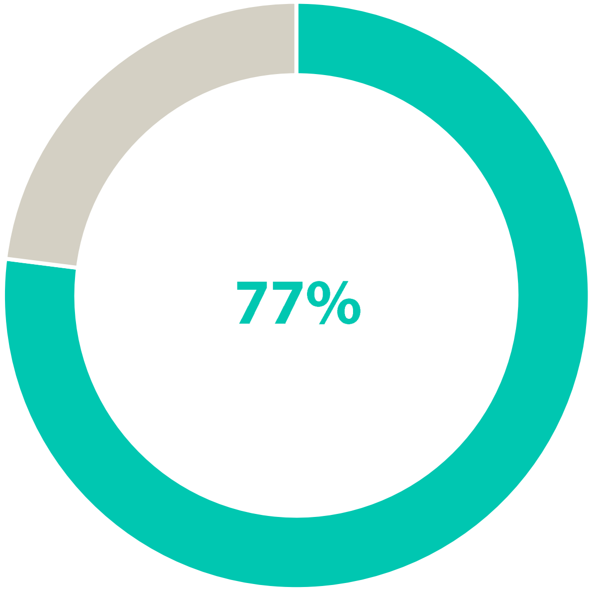
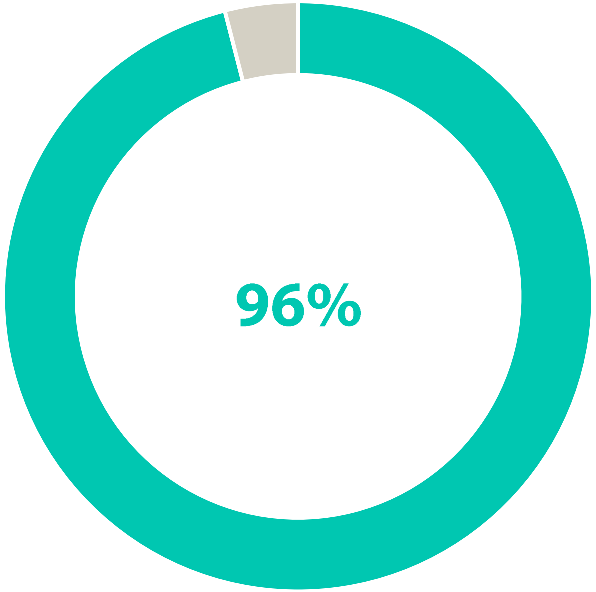
[1] Multiple responses permitted.

VISITOR RATINGS



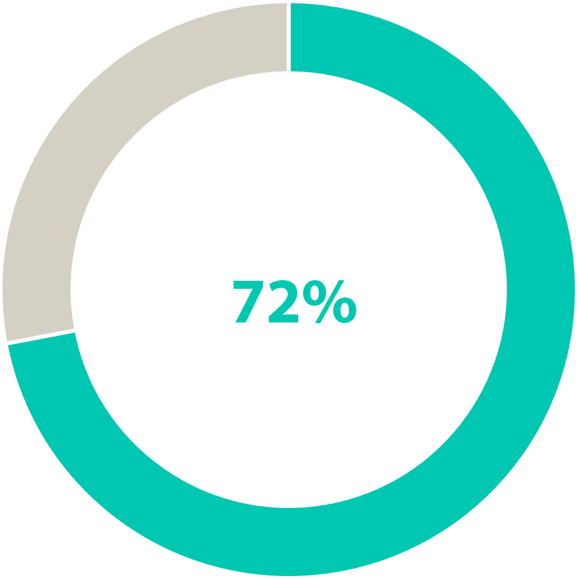
VERY SATISFIED

Over 3 in 4 visitors were very satisfied with their stay in the Pensacola area.



LIKELIHOOD TO RECOMMEND

Over 9 in 10 visitors would recommend the Pensacola area to others.



DEFINITLEY WILL RETURN

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

DETAILED FINDINGS

STUDY OBJECTIVES: VISITOR JOURNEY

PRE-VISIT

- Planning cycle
- Planning sources
- Visitor Guide
- Reasons for visiting
- Recall of destination messaging

TRAVEL PARTY PROFILE

- Visitor origin
- Party size and composition
- Demographics
- New vs. returning visitors

TRIP EXPERIENCE

- Mode of transportation
- Accommodations
- Booking
- Length of stay
- In-market activities
- Beaches visited

POST TRIP EVALUATION

- Satisfaction with the Pensacola area
- Evaluation of destination attributes
- Likelihood to recommend the area
- Likelihood of returning

ECONOMIC IMPACT

- Accommodation metrics
- Number of visitors
- Room nights
- Direct spending
- Jobs supported
- Wages generated

VISITOR JOURNEY: ECONOMIC IMPACT

PRE-VISIT

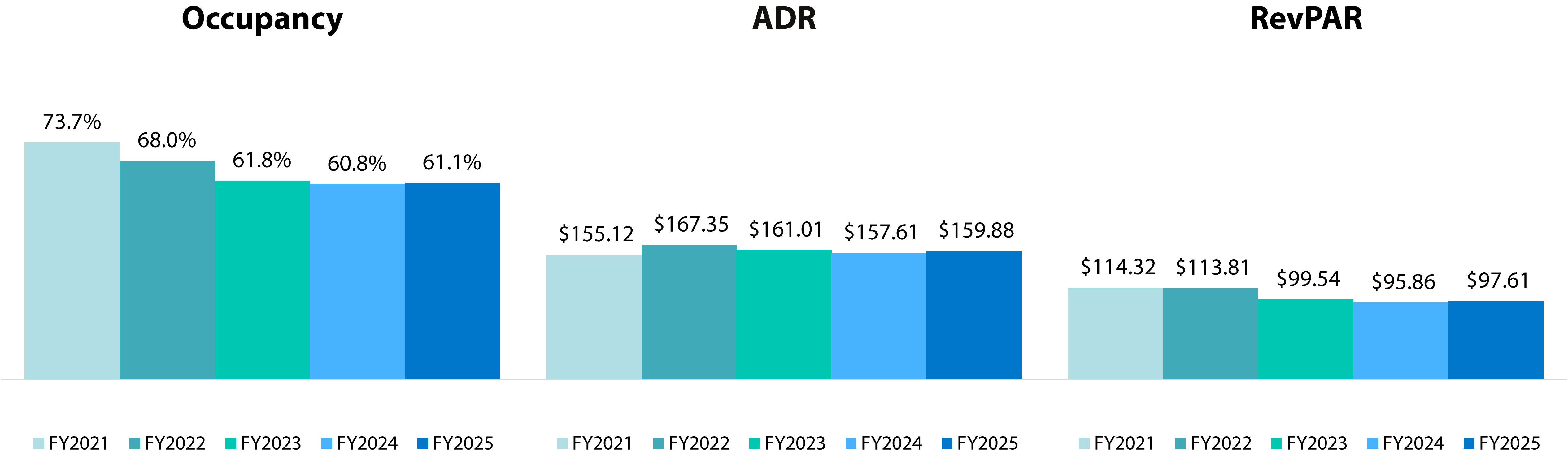
TRAVEL PARTY PROFILE

TRIP EXPERIENCE

POST TRIP EVALUATION

ECONOMIC IMPACT

LODGING METRICS[1]



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

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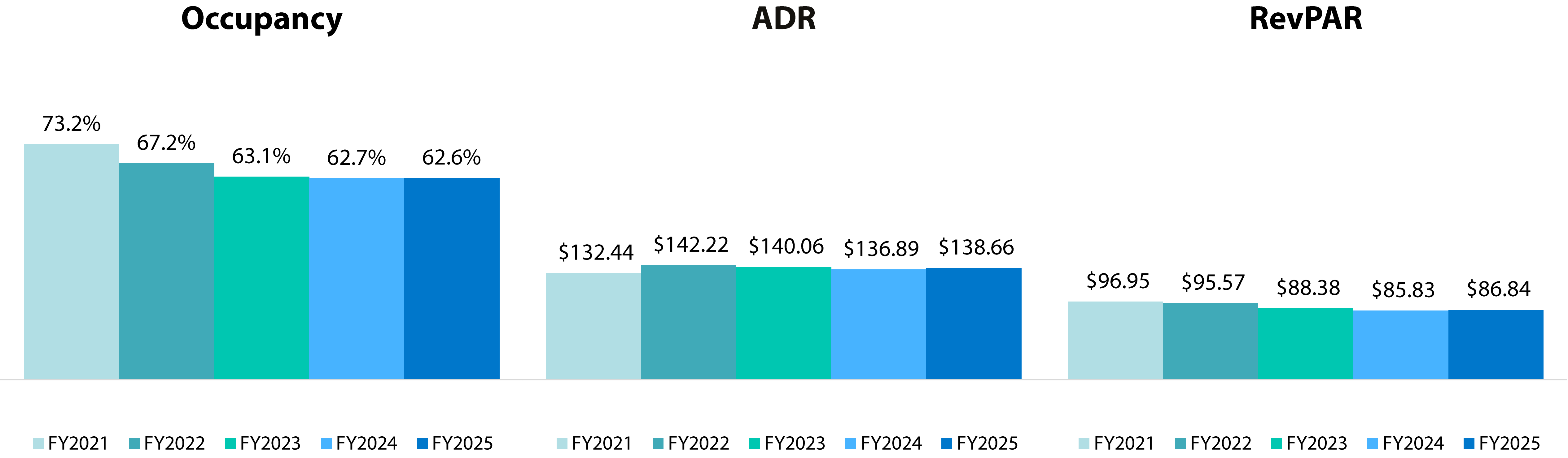
HOTEL METRICS[1]



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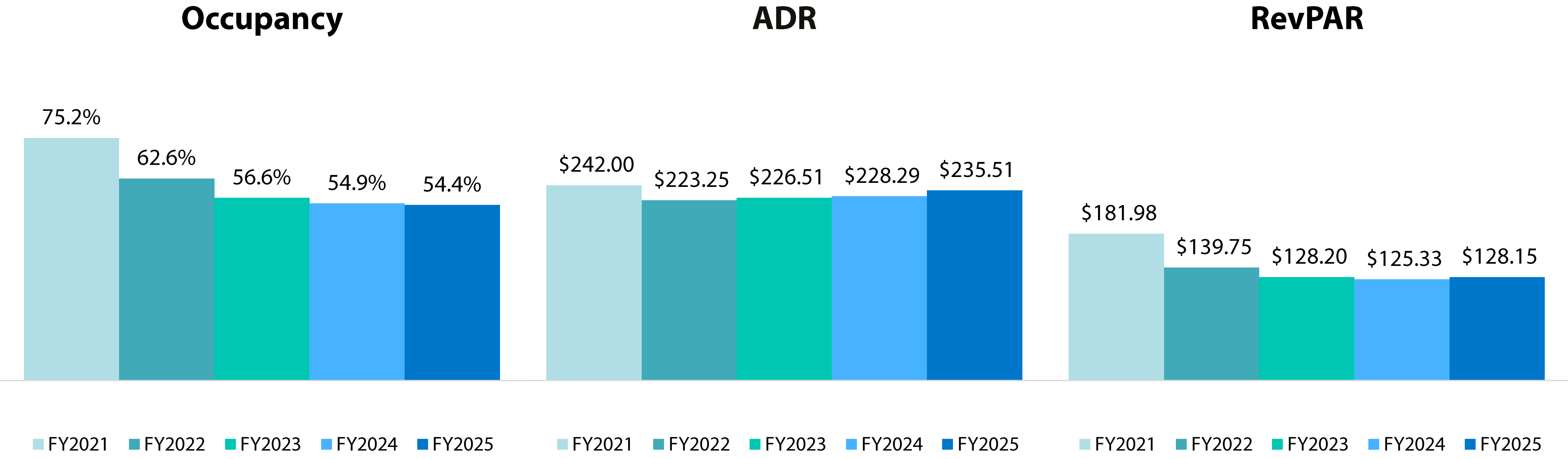
[1] Sources: Smith Travel Research.

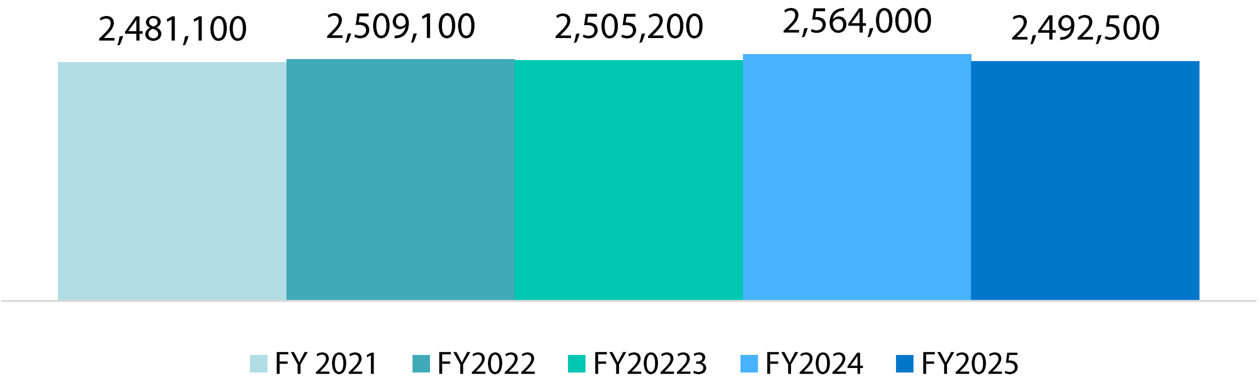
VACATION RENTAL METRICS[1]



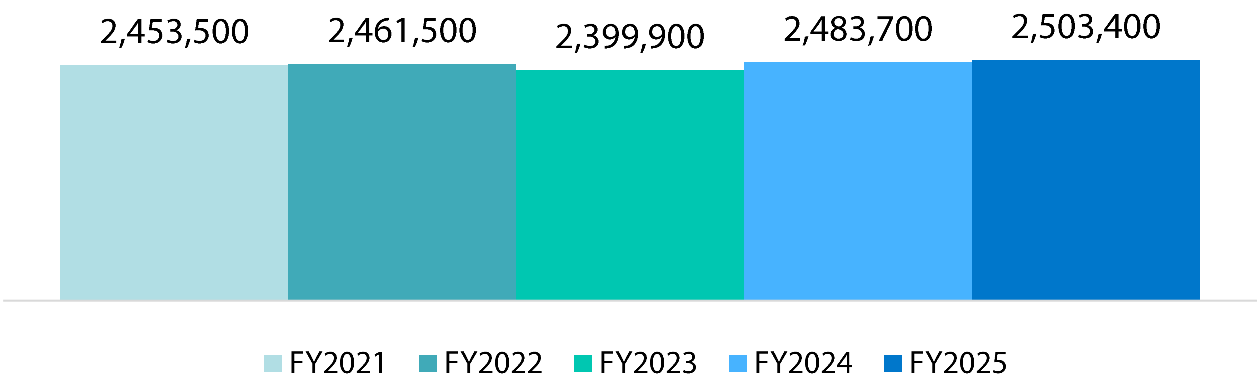
[1] Sources: Key Data and Department of Business and Professional Regulation (DBPR).

IMPACT OF TOURISM METRICS

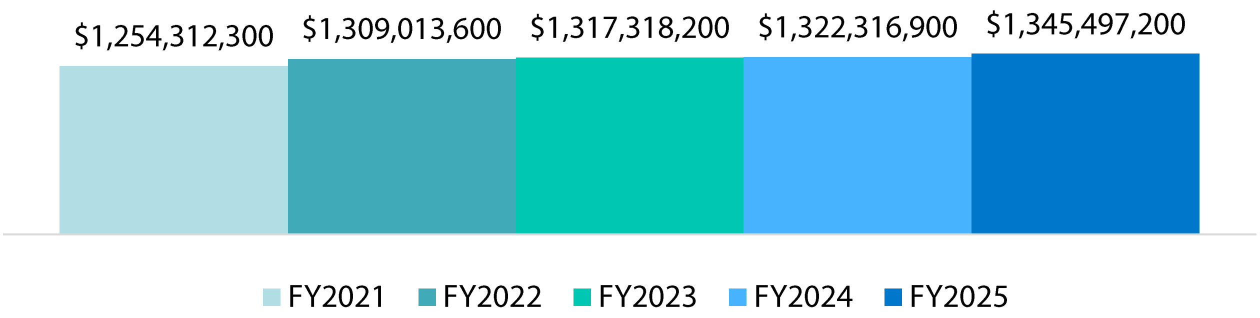
Visitors



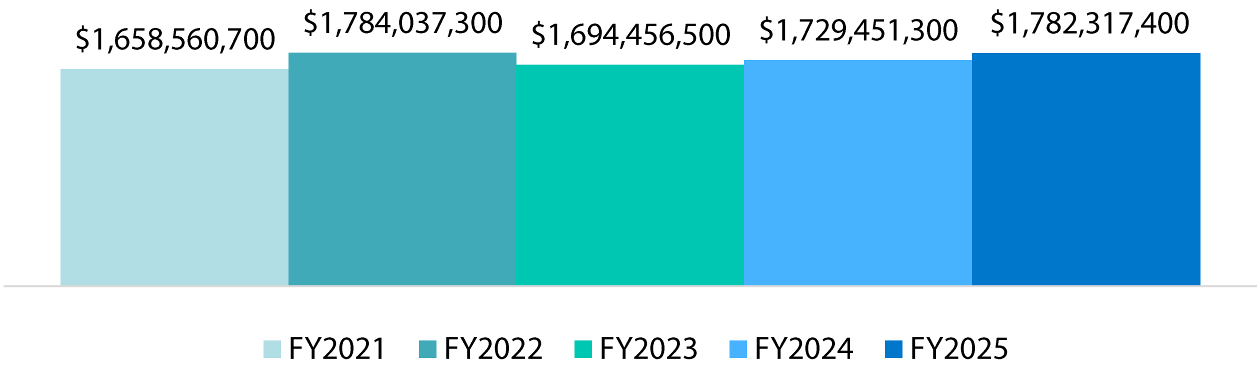
Room Nights[2]



Direct Spending



Economic Impact[1]



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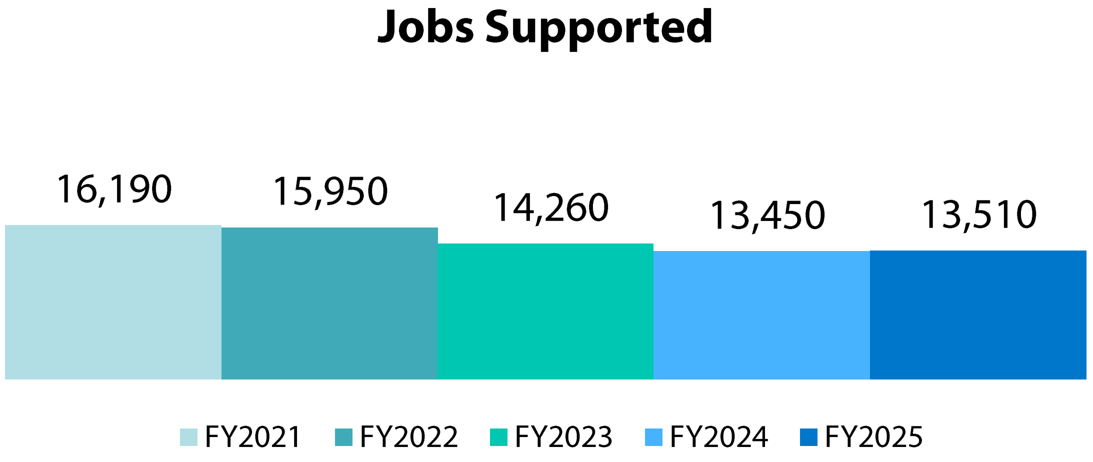
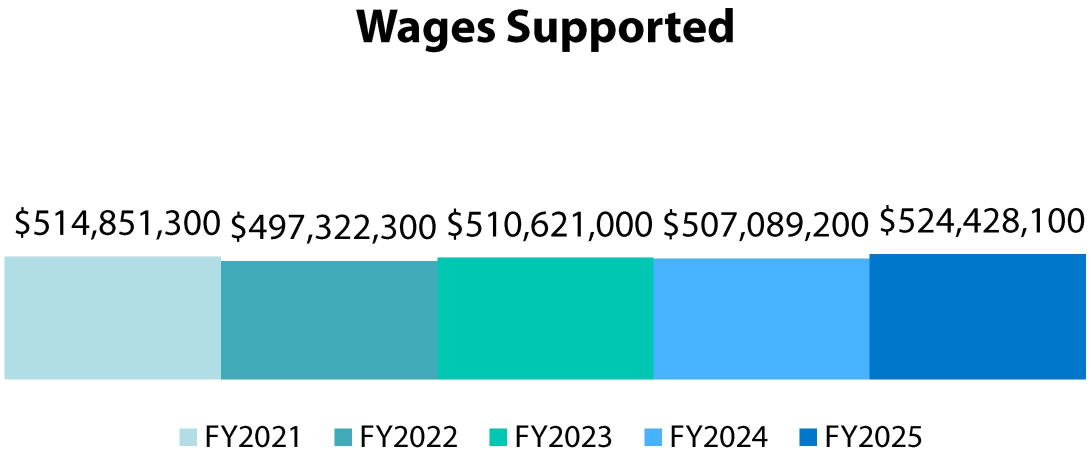
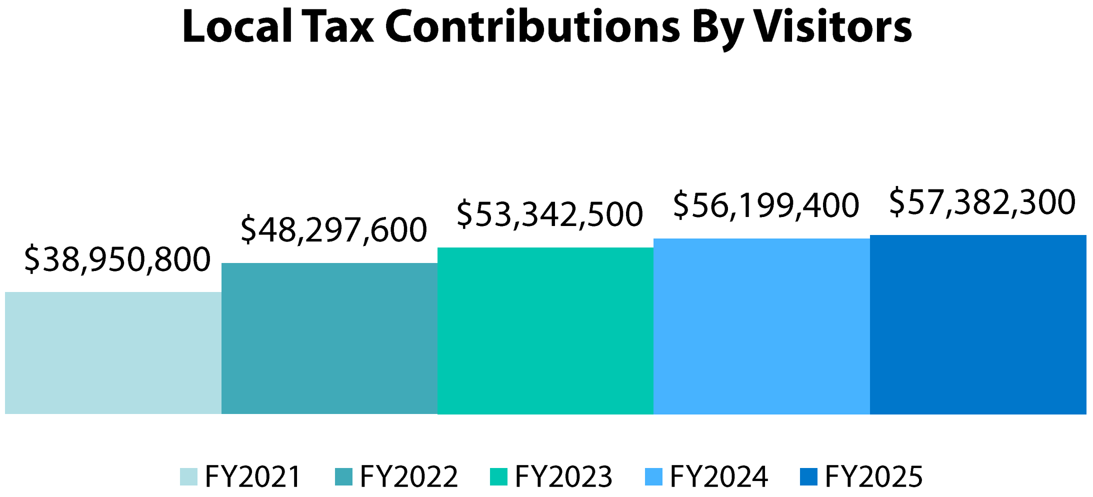
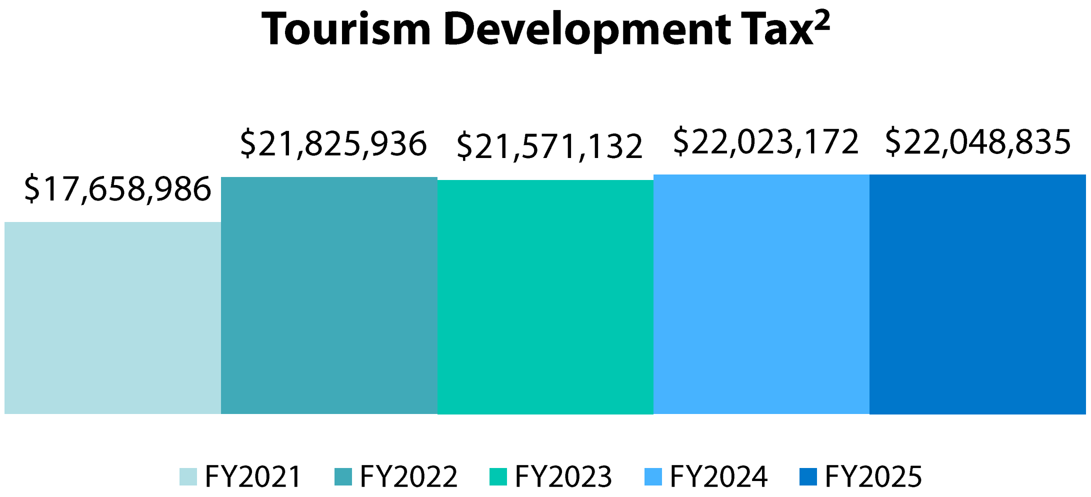
[2] Sources: Smith Travel Research, Key Data, and Department of Business and Professional Regulation.

IMPACT OF TOURISM METRICS CONT.[1]









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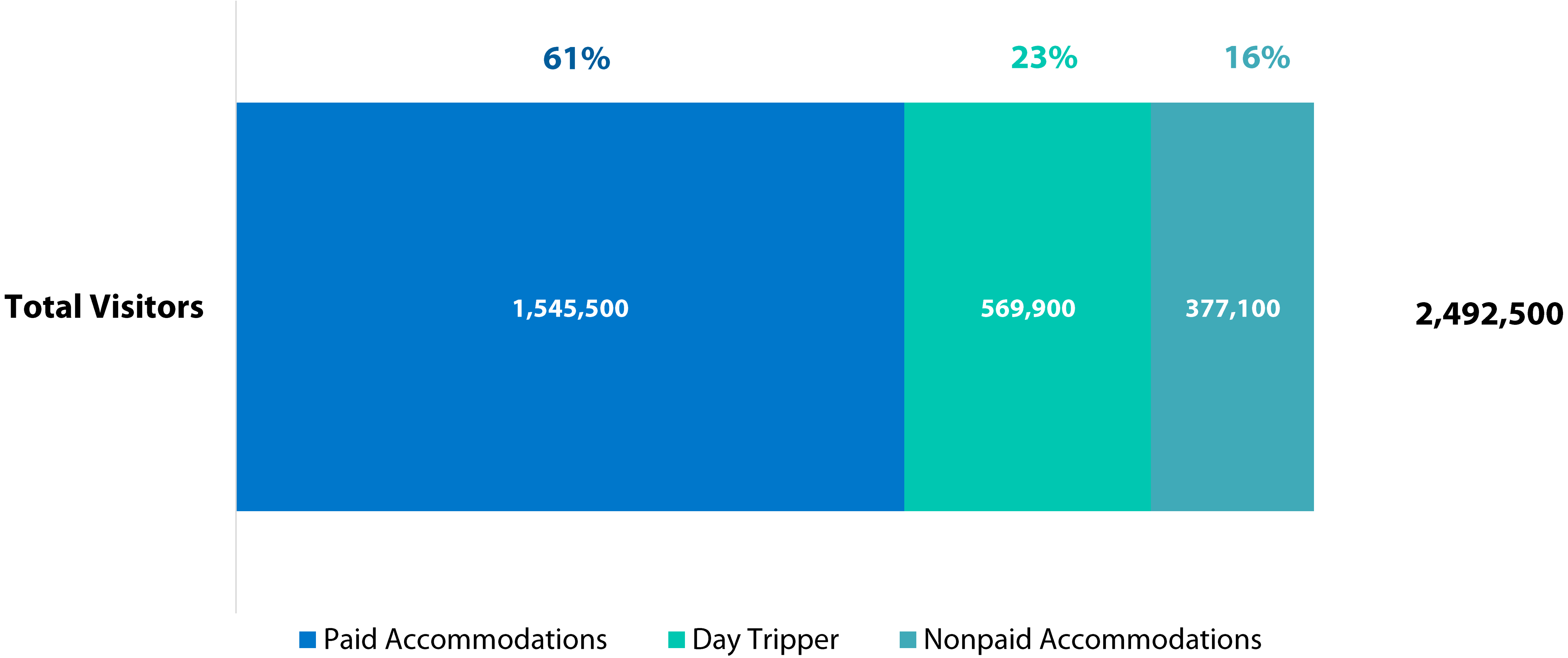
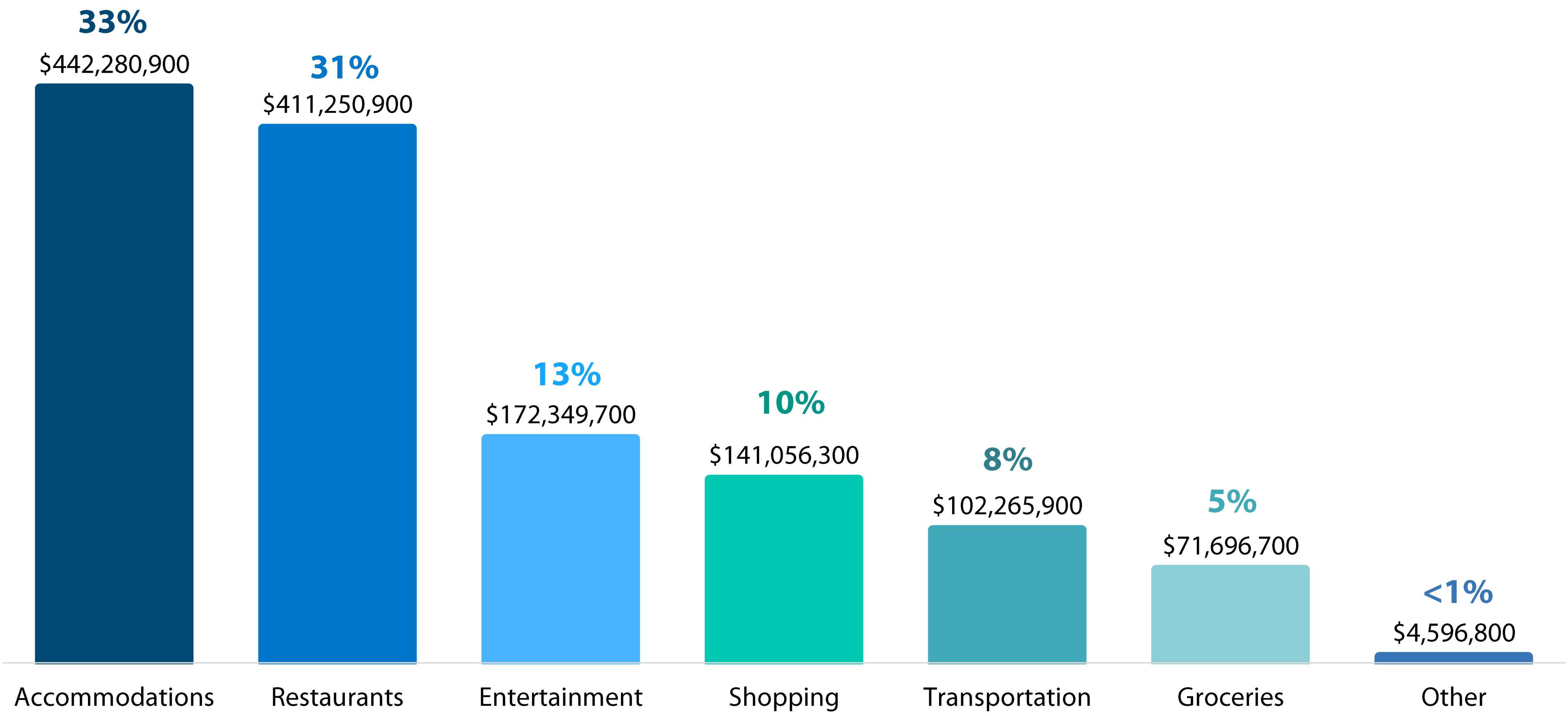
[2] Tax rate increased from 4% to 5% in April of FY2021.

VISITOR TYPES



DIRECT SPENDING BY CATEGORY



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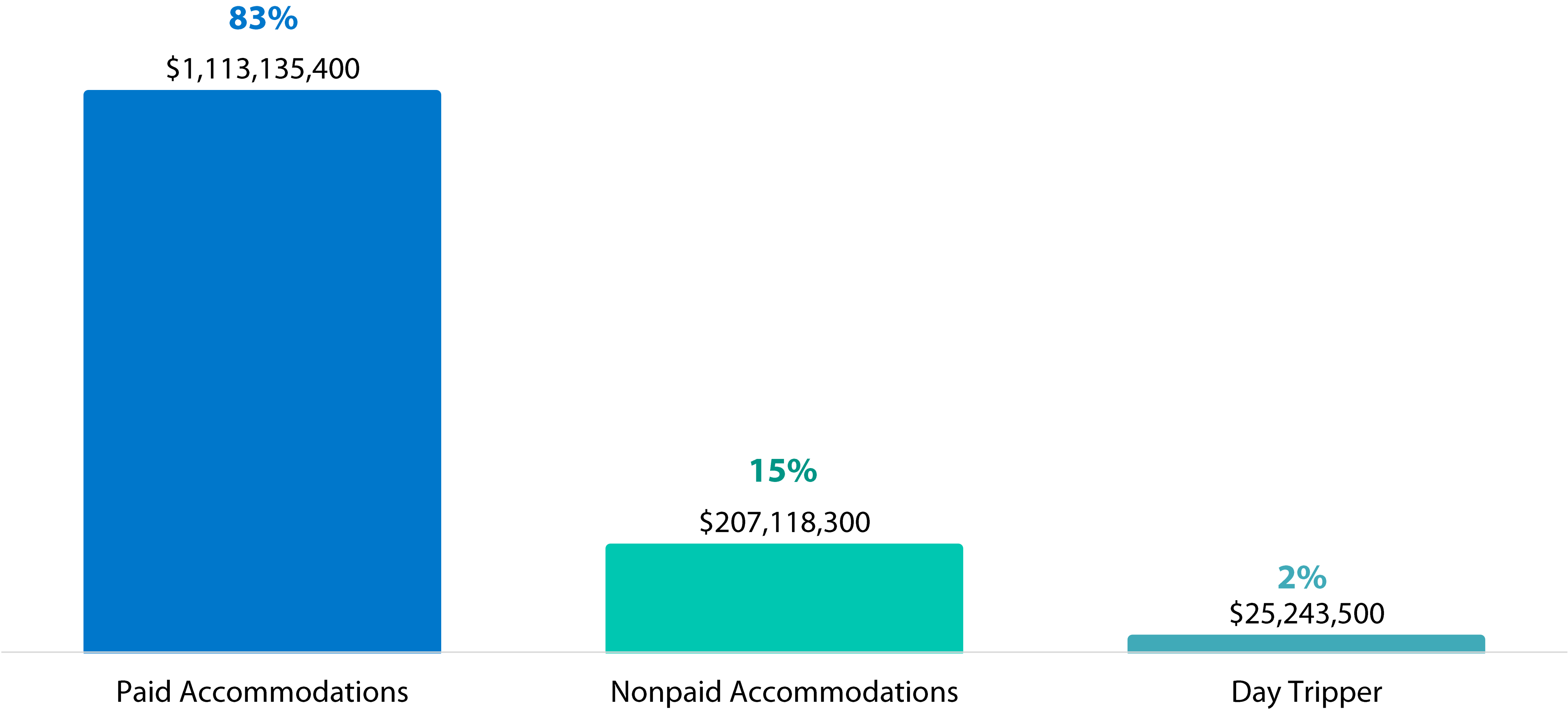
DIRECT SPENDING BY VISITOR TYPE



TRAVEL PARTY SPENDING

	DAILY TRAVEL PARTY SPEND	**TOTAL TRAVEL PARTY SPEND**
Accommodations[1]	$131	$550
Restaurants	$103	$433
Groceries	$17	$71
Shopping	$35	$147
Entertainment	$44	$185
Transportation	$24	$101
Other	$1	$4
TOTAL SPENDING	**$355**	**$1,491**

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

VISITOR JOURNEY: PRE-VISIT

PRE-VISIT

TRAVEL PARTY PROFILE

TRIP EXPERIENCE

POST TRIP EVALUATION

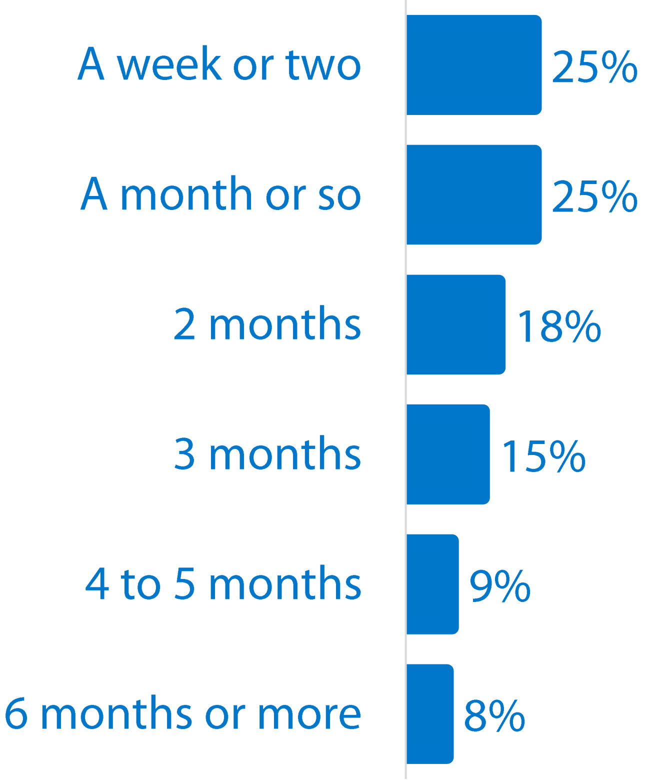
ECONOMIC IMPACT

TRIP PLANNING CYCLE

- Visitors to Pensacola have short trip planning windows, as **half** of visitors planned their trip to the Pensacola area **a month or less in advance** (54% in FY 2024)

- **1 in 3** visitors planned their trips **2-3 months in advance** (32% in FY 2024)

- Average trip planning cycle began **61 days** before the trip (56 days in FY 2024)



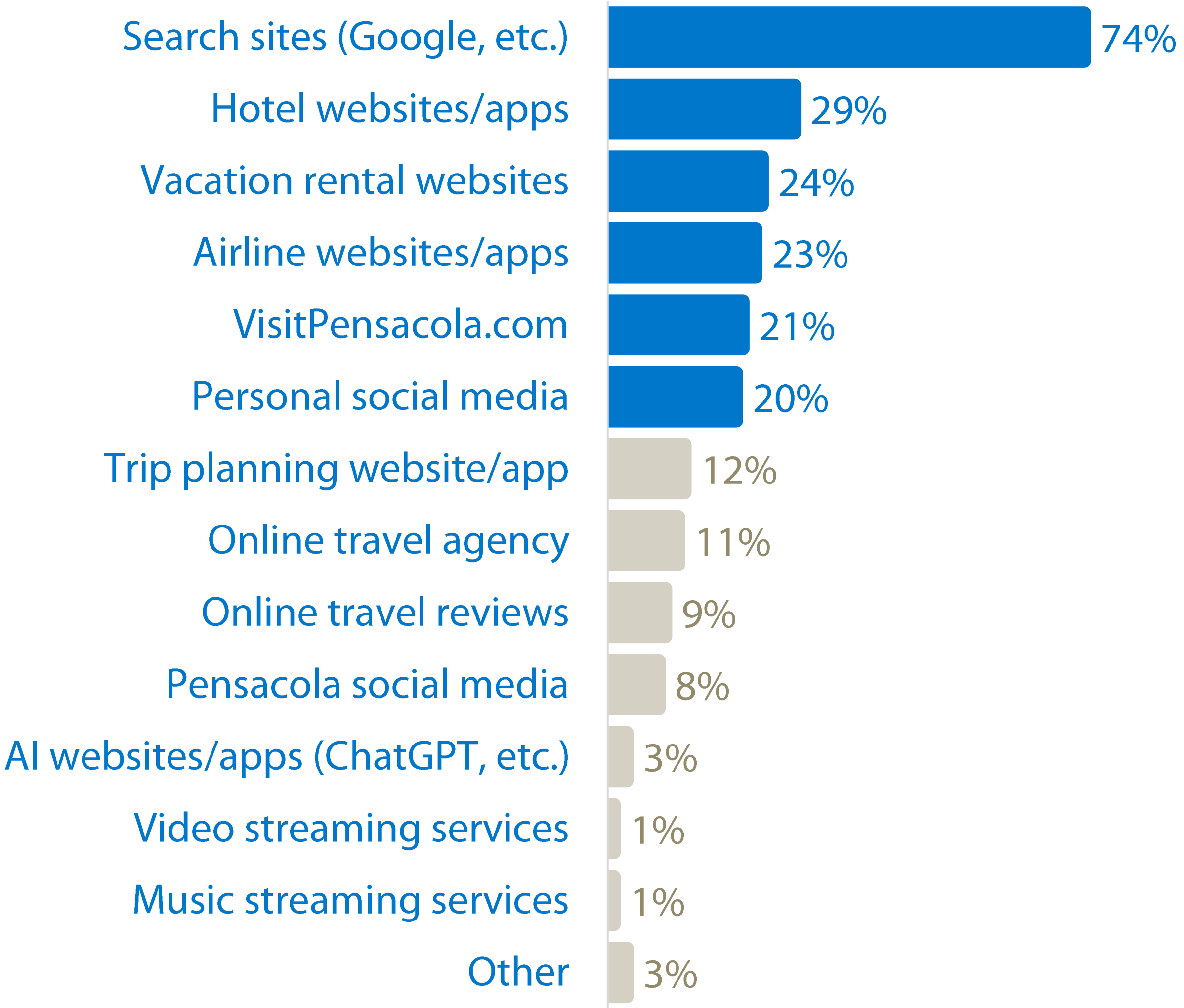
ONLINE TRIP PLANNING SOURCES[1]

- » **Search sites such as Google** continue to be the **number one planning source** for trips to Pensacola

- » **Nearly 3 in 10** visitors used **hotel websites/apps** to plan their trip (26% in FY 2024)

- » **Nearly 1 in 4** visitors used **vacation rental websites/apps** and **airline websites/apps** to plan their trip

- » **1 in 5** visitors utilized **VisitPensacola.com** (17% in FY 2024) and **personal social media** for trip planning



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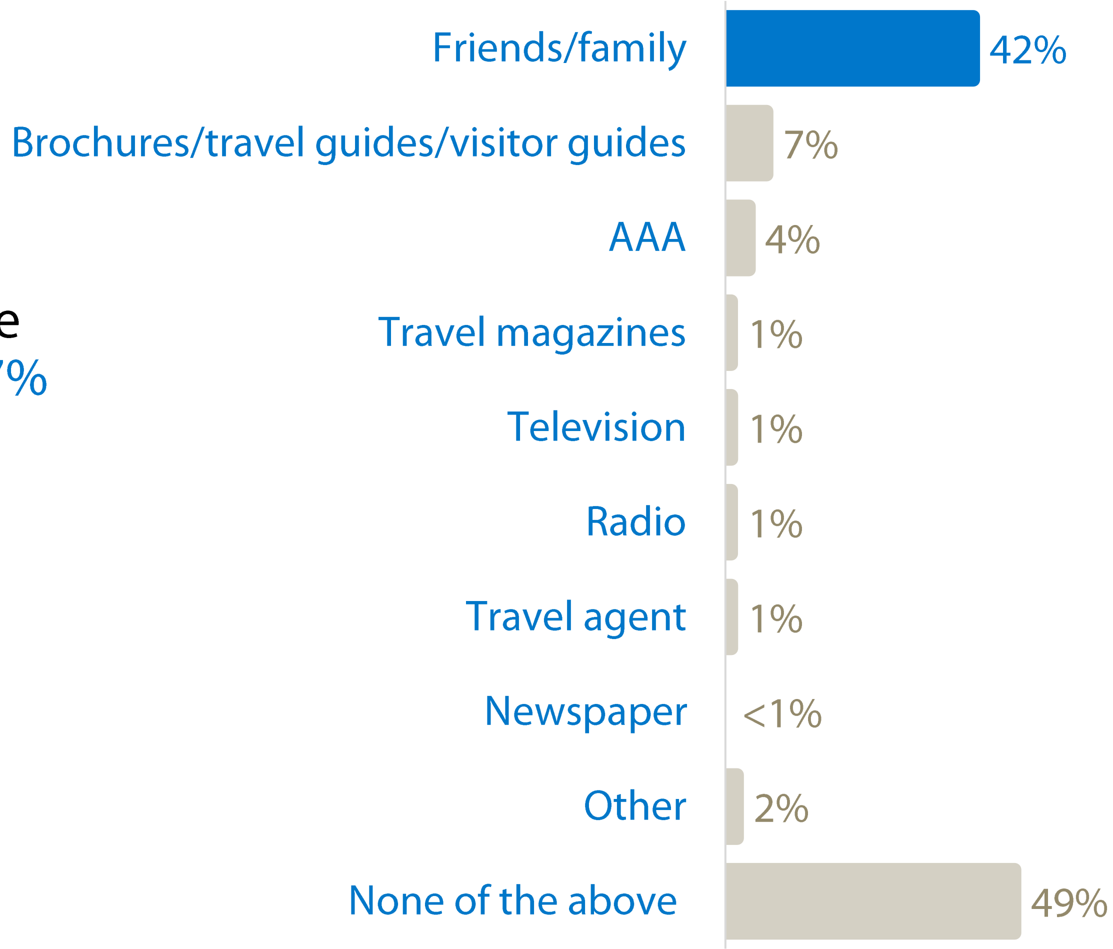
[1] Multiple responses permitted.

OTHER TRIP PLANNING SOURCES[1]

- **Over 2 in 5** visitors planned their trip to the Pensacola area through **friends/family** (37% in FY 2024)
- **1 in 14** visitors used **brochures, travel guides, and/or visitor guides**



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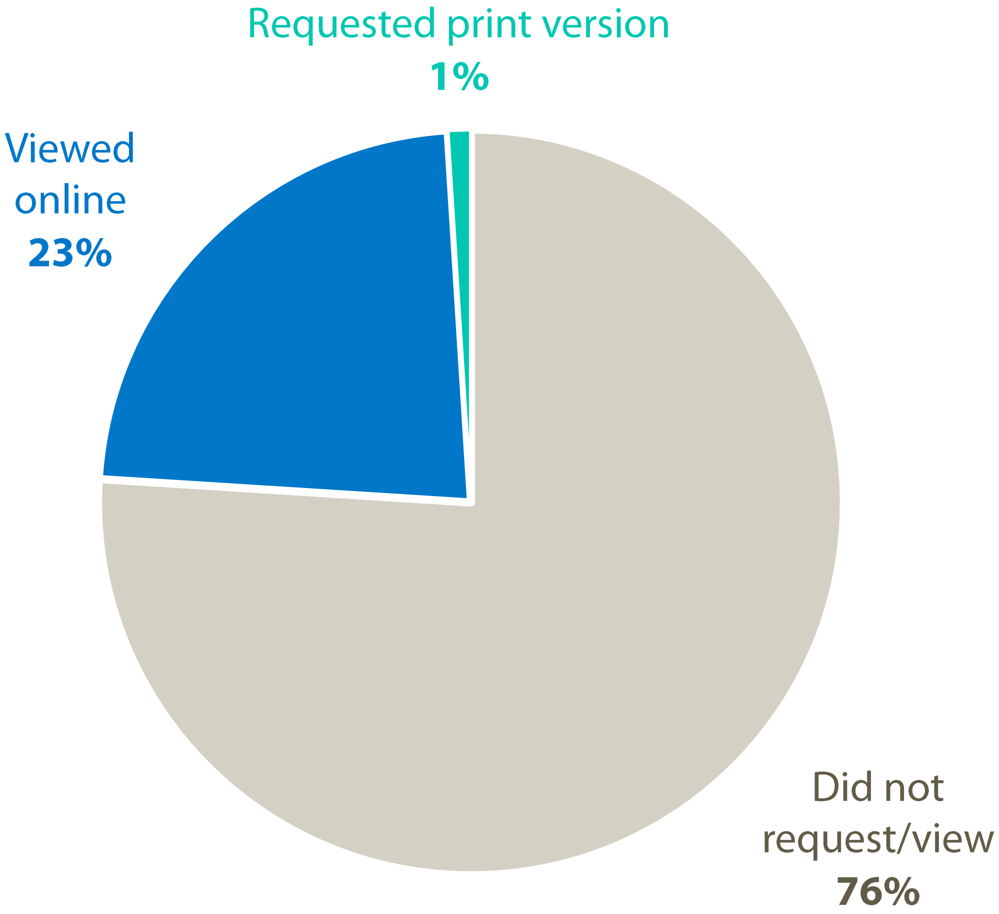
[1] Multiple responses permitted.

VISITOR GUIDE

- **Nearly 1 in 4** visitors **requested or viewed** the Pensacola Visitors Guide (19% in FY 2024)
- **Online** viewership of the Pensacola Visitor Guide was **significantly greater than print consumption**



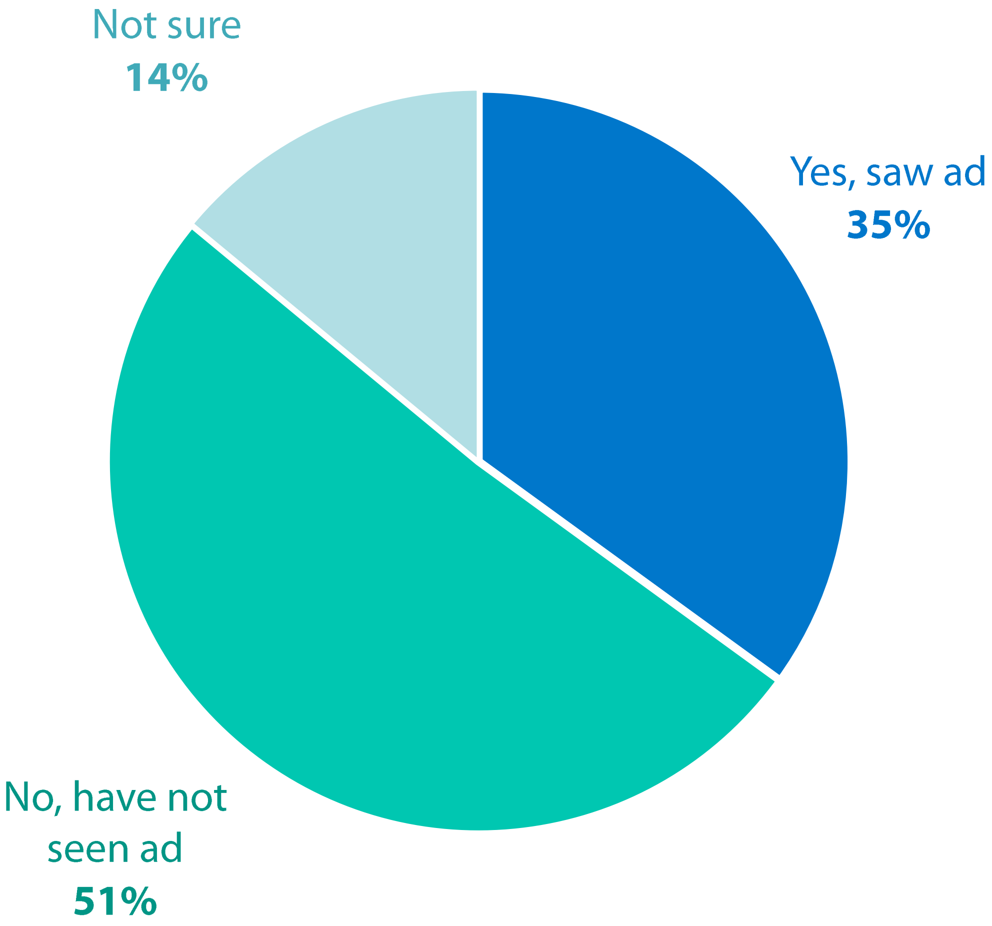
REASONS FOR VISITING[1]

- **Over 2 in 5** visitors came to the Pensacola area to visit the **beach**
- **1 in 3** visitors came to **relax and unwind**
- **1 in 4** visitors came to **visit friends and relatives**

[1] Up to three responses permitted

ADVERTISING RECALL[1]

- **Over 1 in 3** visitors **recalled advertising** about the Pensacola area (28% in FY 2024)



[1] Note: 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 SOURCE[1]

Of the **35%** of visitors who **recalled advertising** about the Pensacola area:

- **Over 1 in 3** visitors noticed advertising on **VisitPensacola.com** (23% in FY 2024)
- **3 in 10** visitors noticed advertising on **personal social media**
- **Nearly 1 in 4** visitors noticed advertising on **television**
- **Nearly 1 in 6** visitors noticed advertising on **weather app**, **Visit Pensacola social media**, and **traveler reviews/blogs**

Base: **35%** of visitors who recalled advertising

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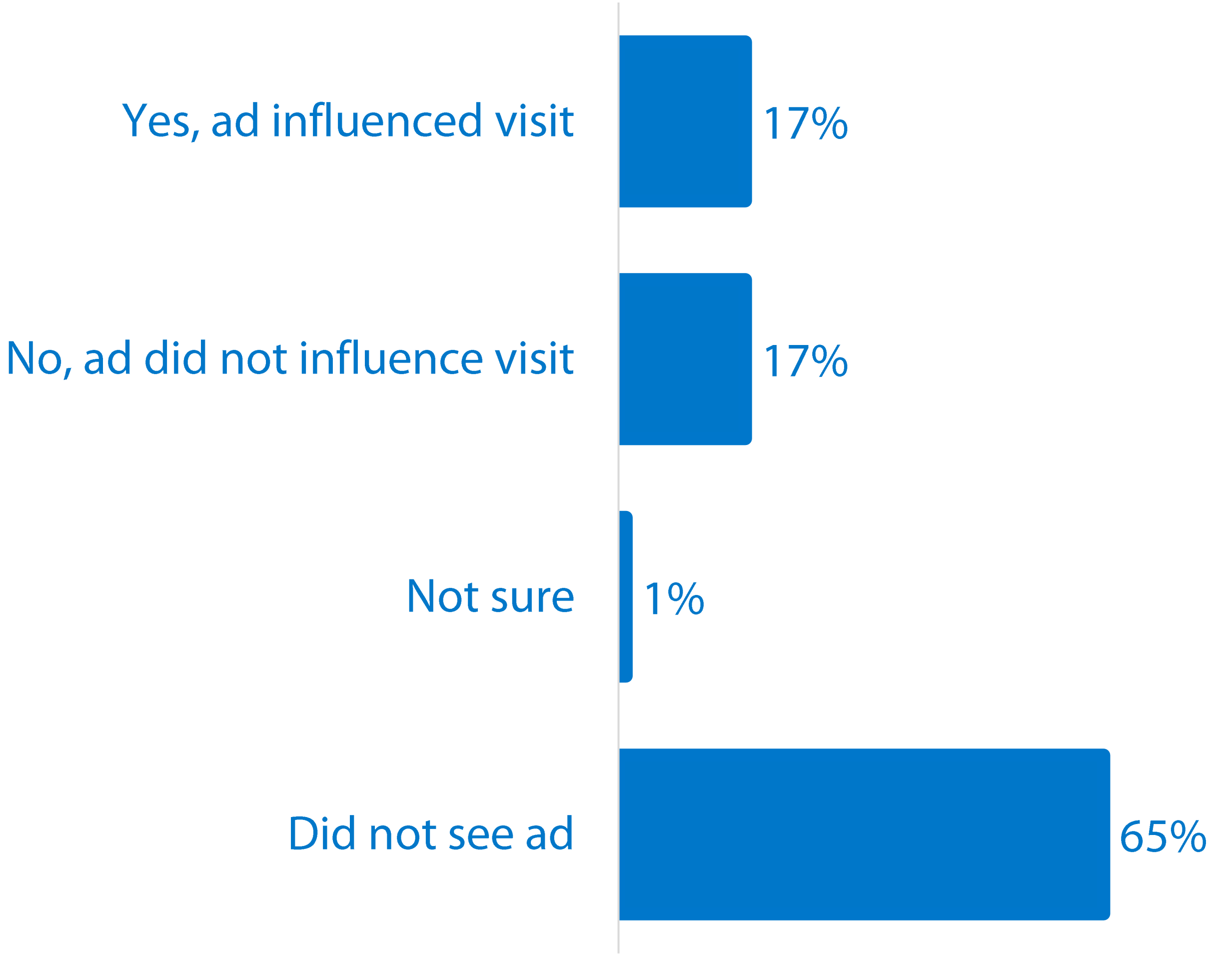
[1] Multiple responses permitted.

ADVERTISING INFLUENCE[1]

- **17%** of **all visitors** were influenced by an ad to visit the Pensacola area (12% in FY 2024)



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

VISITOR JOURNEY: TRAVEL PARTY PROFILE

PRE-VISIT

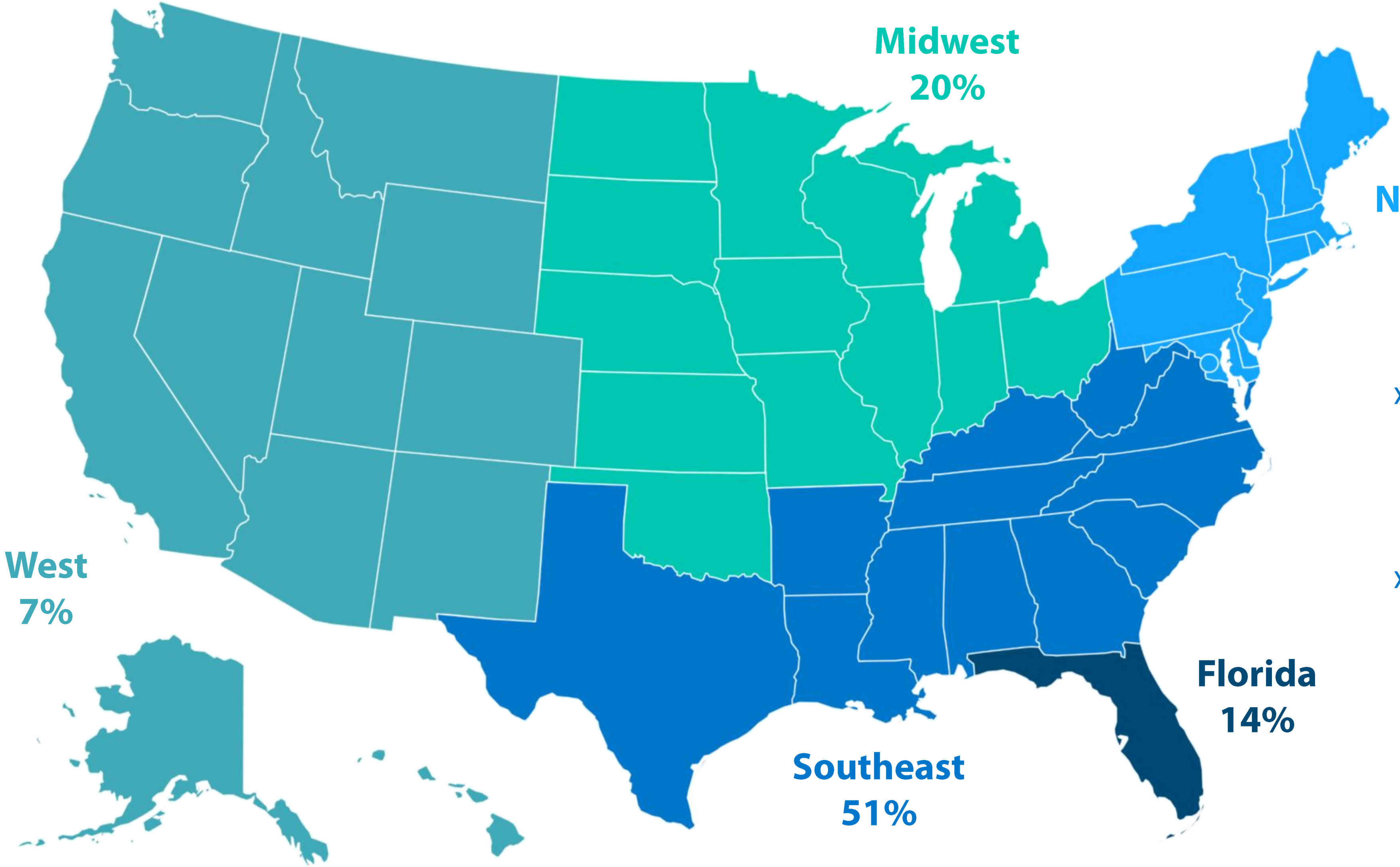
TRAVEL PARTY PROFILE

TRIP EXPERIENCE

POST TRIP EVALUATION

ECONOMIC IMPACT

REGION OF ORIGIN[1]



- **Nearly 2 in 3** visitors traveled to the Pensacola area from the **Southeast**, including **Florida**
- The **2%** of visitors who traveled **internationally** to the Pensacola area came mostly from Ontario, the United Kingdom, Germany, and France

[1] Sources: Zartico and Visitor Tracking Study.

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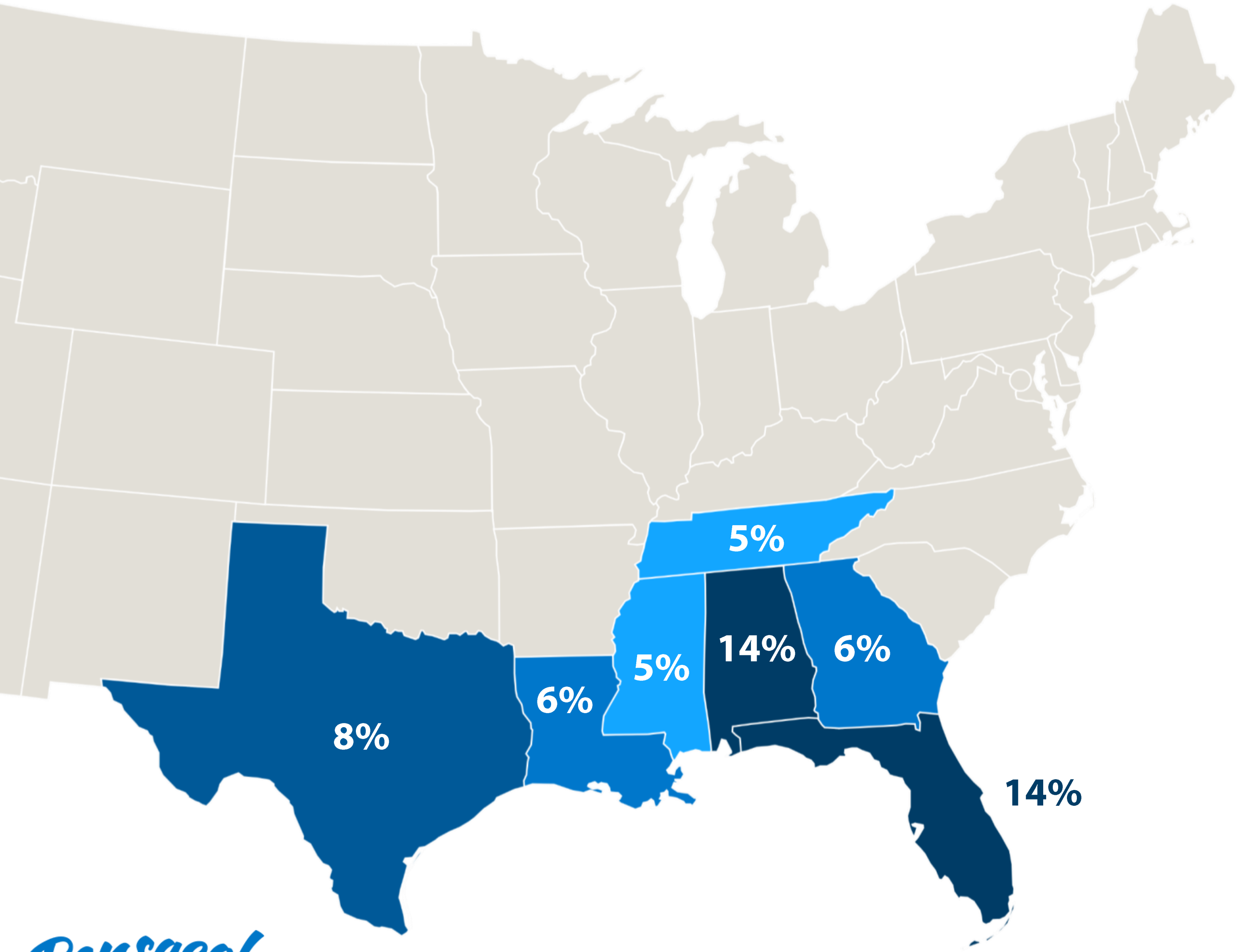
RESEARCH

TOP STATES OF ORIGIN[1]



TOP STATES	2025[1]
Florida	**14%**
Alabama	**14%**
Texas	**8%**
Georgia	**6%**
Louisiana	**6%**
Tennessee	**5%**
Mississippi	**5%**

58% of visitors traveled from **7** states

[1] Sources: Zartico and Visitor Tracking Study.

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RESEARCH

TOP ORIGIN MARKETS[1]

- **Mobile**[2] continues to be the top DMA for the Pensacola area
- **34%** of visitors traveled from **8** market areas

MARKETS	2025[1]
Mobile[2]	15%
Atlanta	4%
New Orleans	3%
Birmingham	3%
Nashville	3%
Dallas – Fort Worth	3%
Houston	2%
Montgomery	2%

[1] Sources: Zartico and Visitor Tracking Study.

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

TRAVEL PARTIES

- For **all visitors**[1], the typical **travel party size** was **2.8** (3.0 in FY 2024)
- The typical **travel party size** for visitors staying in **paid accommodations** was **3.0** (3.2 in FY 2024)
- **Nearly half** of travel parties included **children under the age of 20** (42% in FY 2024)

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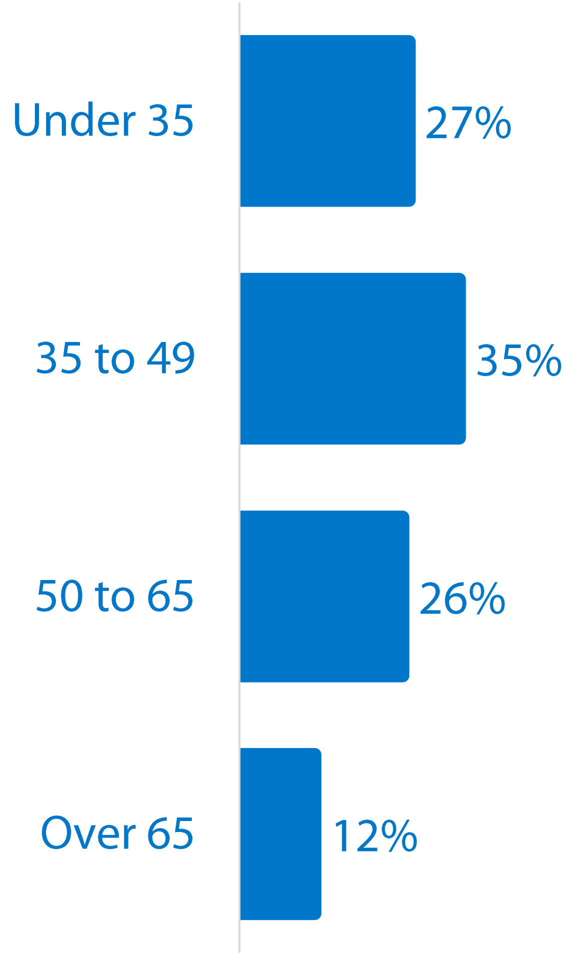
[1] Includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.

*Children are considered people under the age of 20

AGE

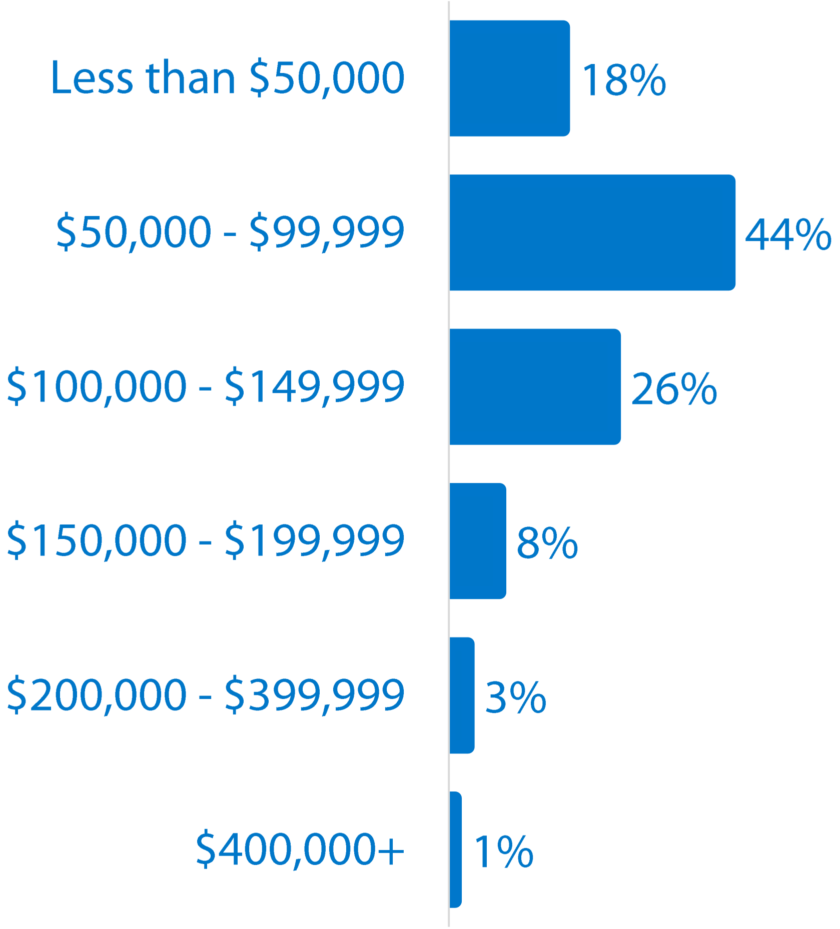
- The median **age**[1] of visitors to the Pensacola area was **45**



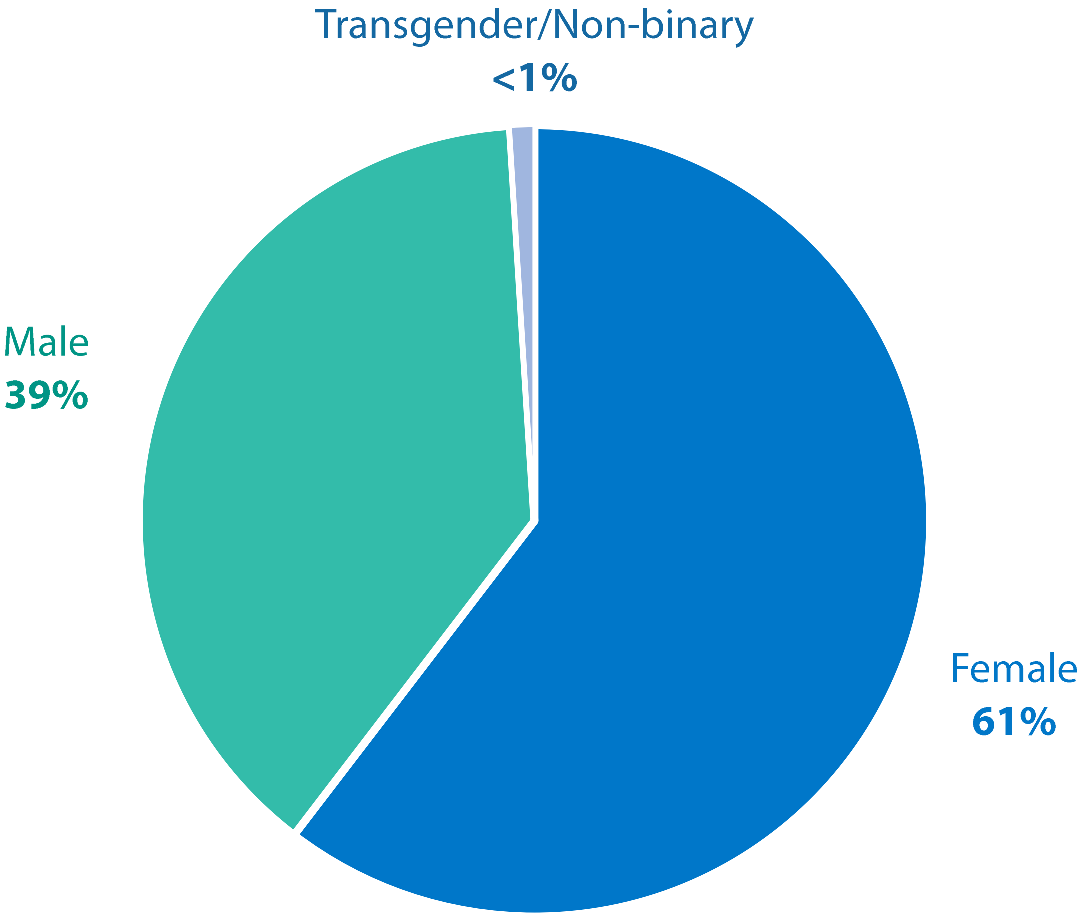
[1] Age of member of travel party surveyed.
The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

HOUSEHOLD INCOME

- Visitors to the Pensacola area had a **median household income** of **$86,400** per year
- **38%** of visitors had household incomes of **$100,000 or more**



GENDER

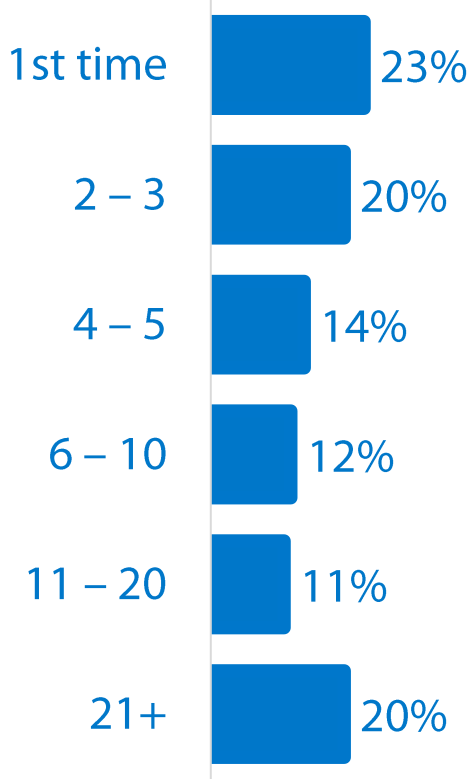


- **61%** of visitors interviewed were **female**[1]

[1] Gender of the member of 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.

NEW & RETURNING VISITORS

- **Nearly 1 in 4** visitors said **this was their first time visiting** the Pensacola area (27% in FY 2024)
- **Nearly 1 in 3** visitors were loyalists having visited over 10 times (26% in FY 2024)



VISITOR JOURNEY: TRIP EXPERIENCE

PRE-VISIT

TRAVEL PARTY PROFILE

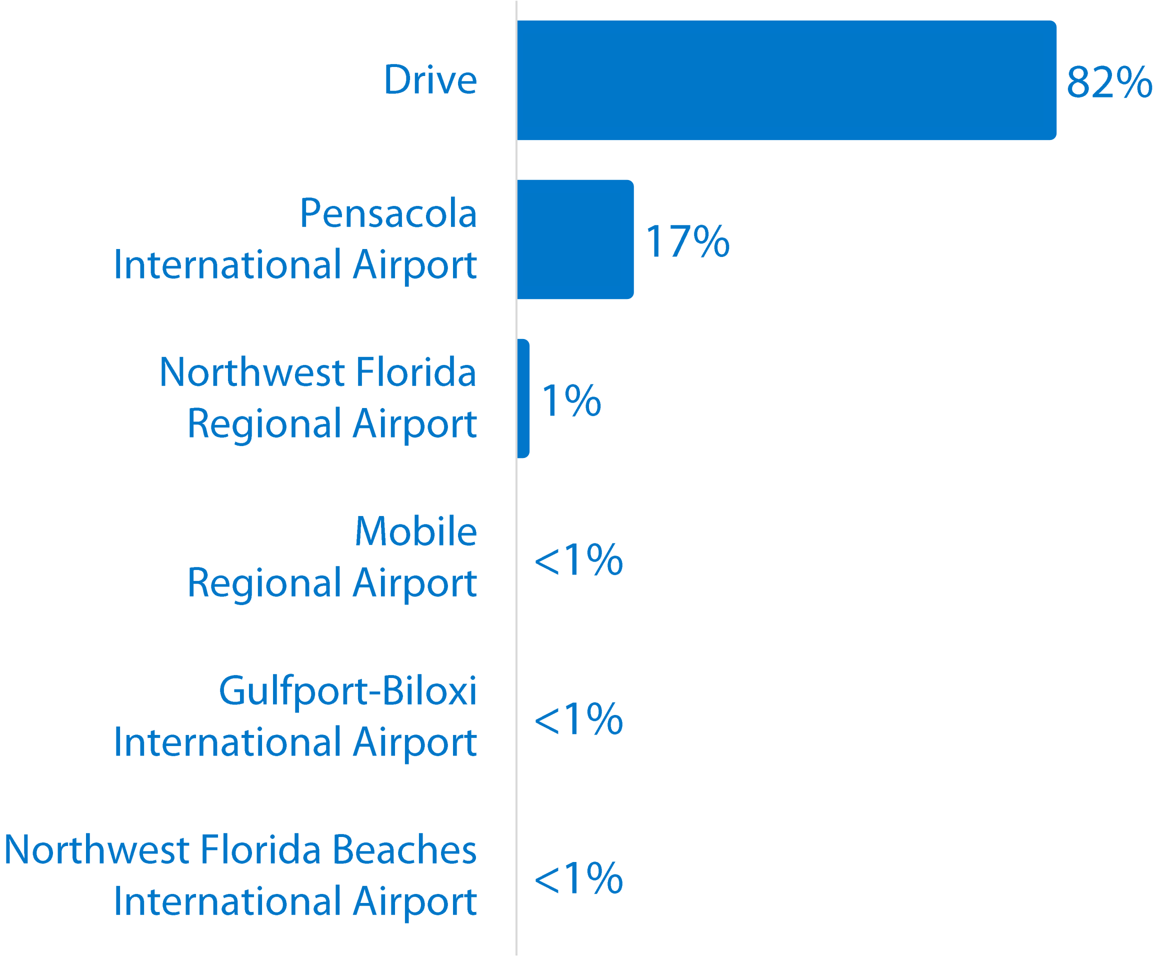
TRIP EXPERIENCE

POST TRIP EVALUATION

ECONOMIC IMPACT

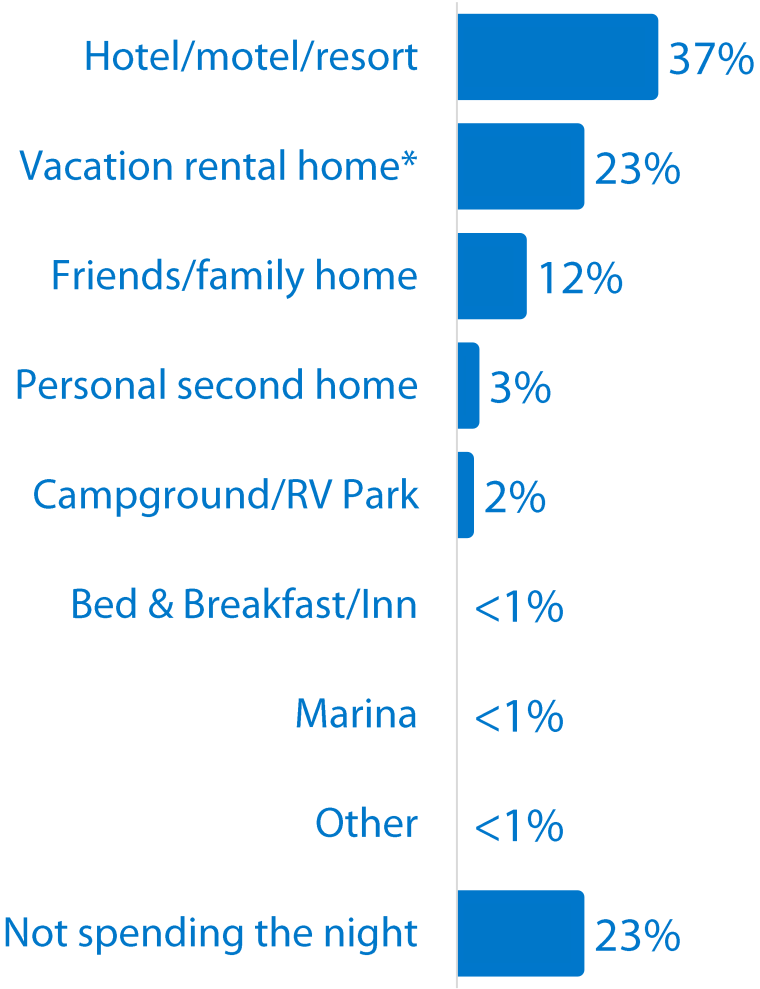
TRANSPORTATION

- **Over 4 in 5** of visitors **drove** to the Pensacola area for their trip
- **17%** of **all** visitors used the **Pensacola International Airport**



ACCOMMODATIONS

- **Nearly 2 in 5** visitors stayed overnight in a **hotel, motel, or resort** (35% in FY 2024)
- The typical visitor[1] stayed **4.2** nights in Pensacola area (4.3 nights in FY 2024)
- Visitors staying in **paid accommodations**[2] stayed an average of **4.8** nights in the Pensacola area (5.0 nights in FY 2024)



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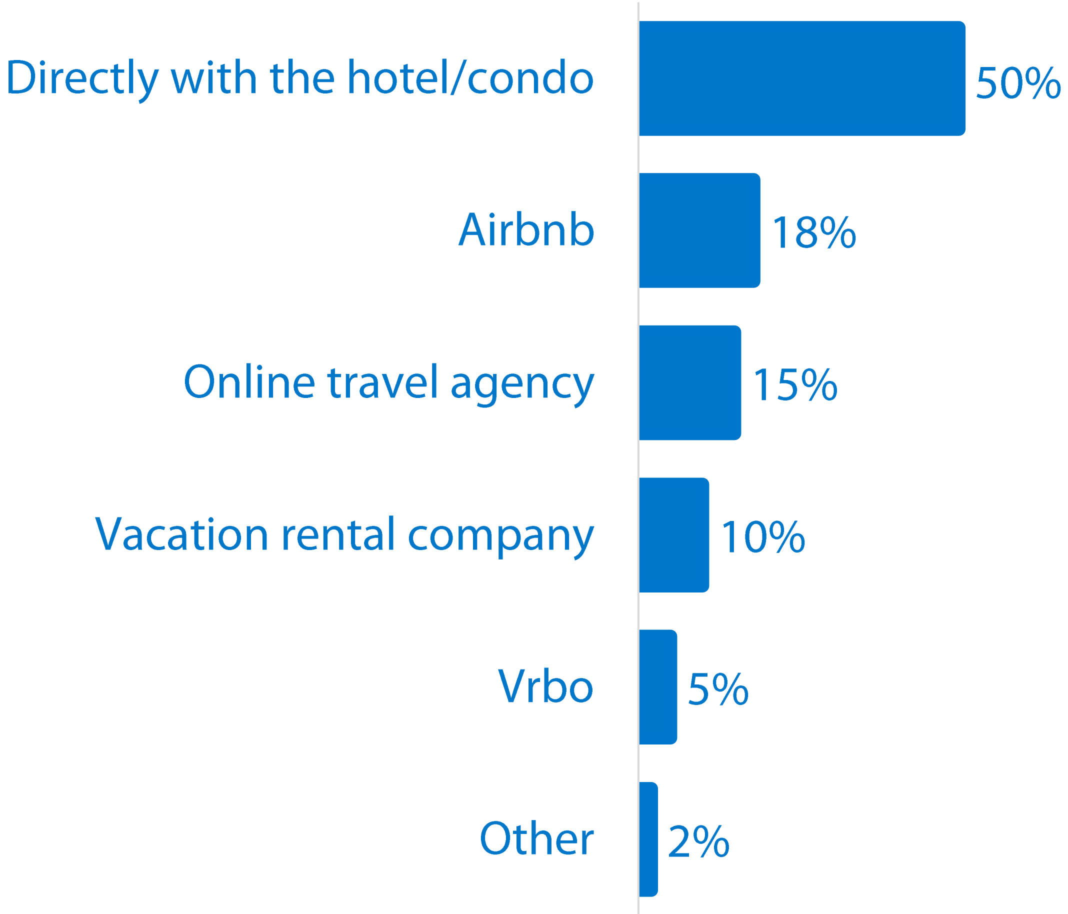
[1] Visitors staying in paid accommodations, nonpaid accommodations, and day trippers.

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

*Includes Airbnb, Vrbo, etc.

ACCOMMODATION BOOKING

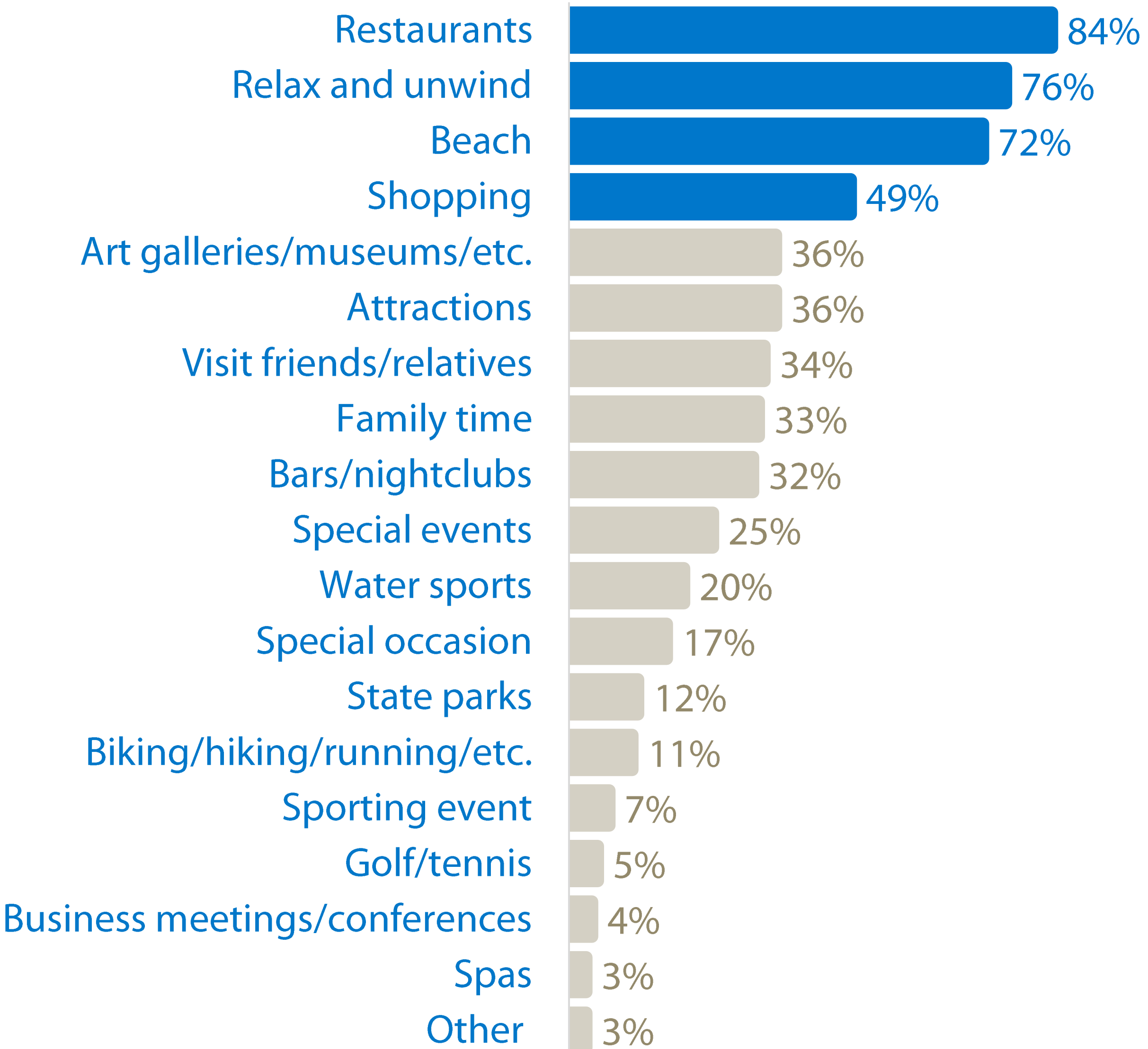
- **Half** of visitors booked their trip to the Pensacola area **directly with the hotel/condo**
- **Nearly 1 in 5** visitors booked through **Airbnb**



VISITOR ACTIVITIES[1]

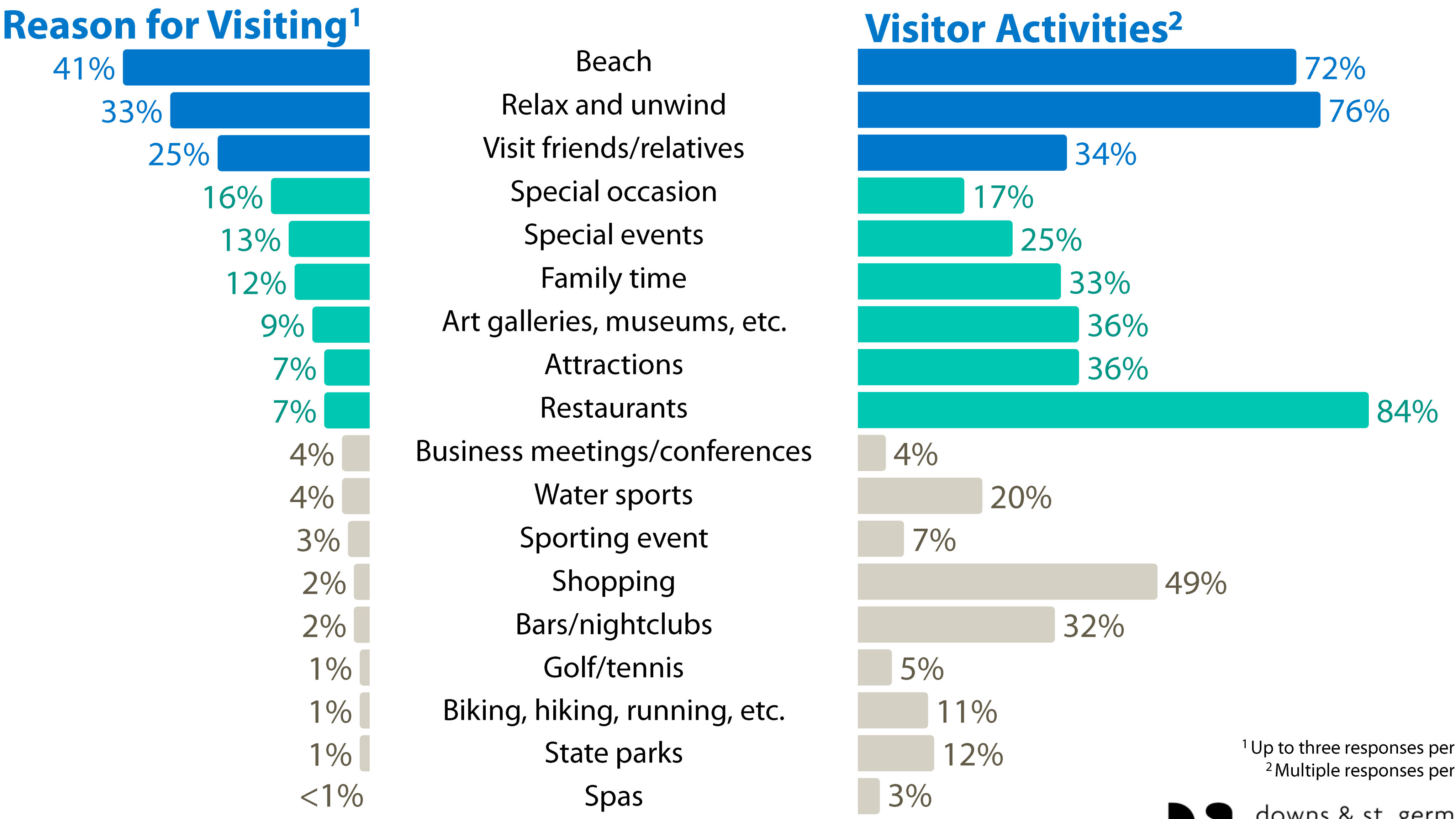
Top activities enjoyed by visitors this year include:

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



[1] Multiple responses permitted.

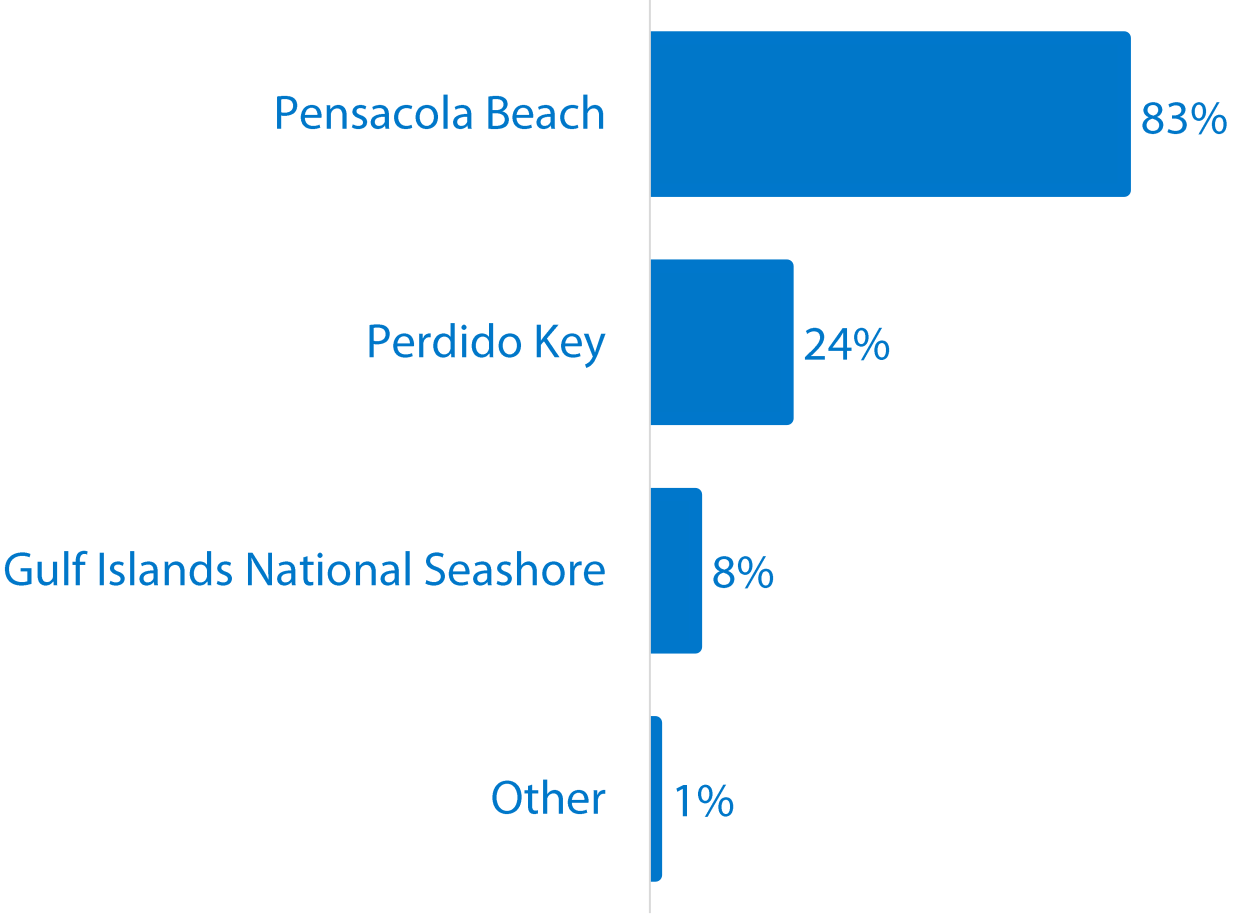
ACTIVITIES V. REASON FOR VISIT



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

BEACHES VISITED[1]

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



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[1] Multiple responses permitted.

VISITOR JOURNEY: POST TRIP EVALUATION

PRE-VISIT

TRAVEL PARTY PROFILE

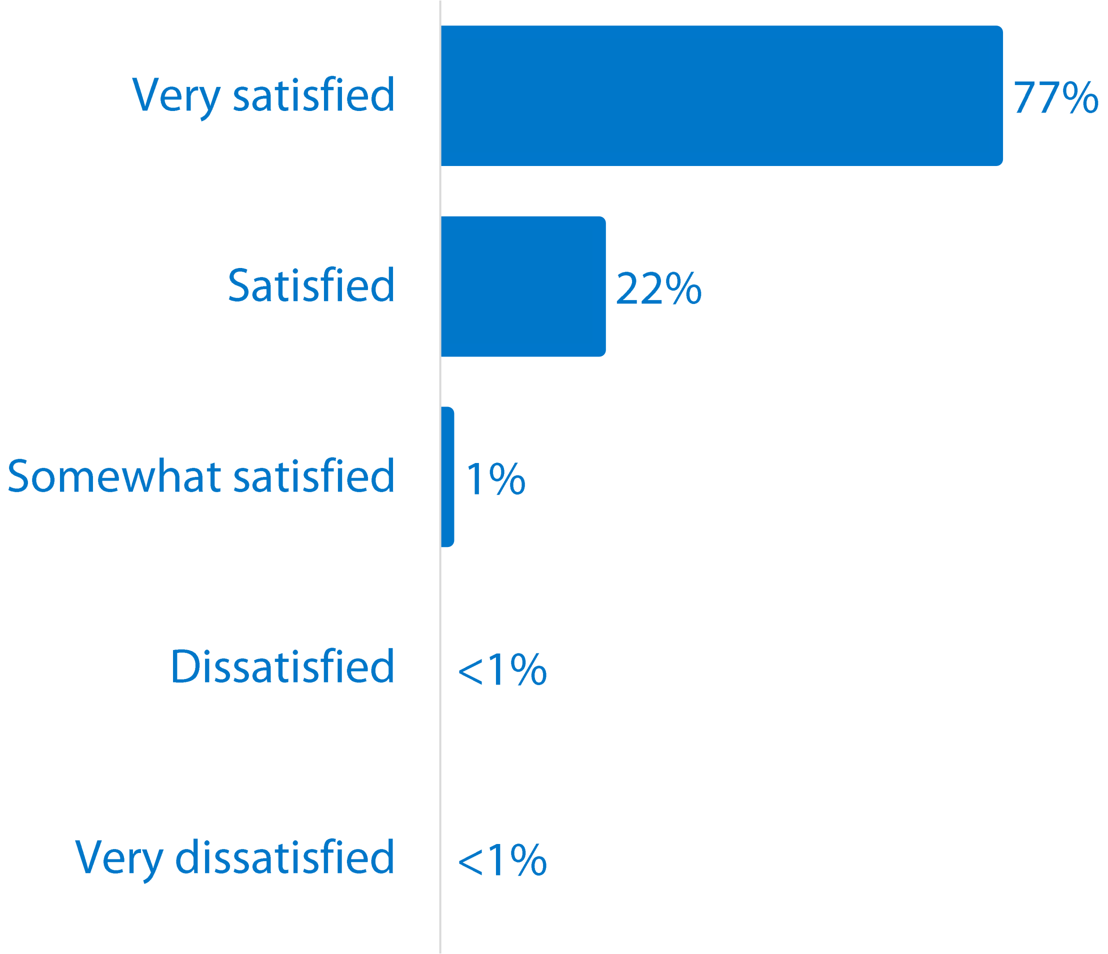
TRIP EXPERIENCE

POST TRIP EVALUATION

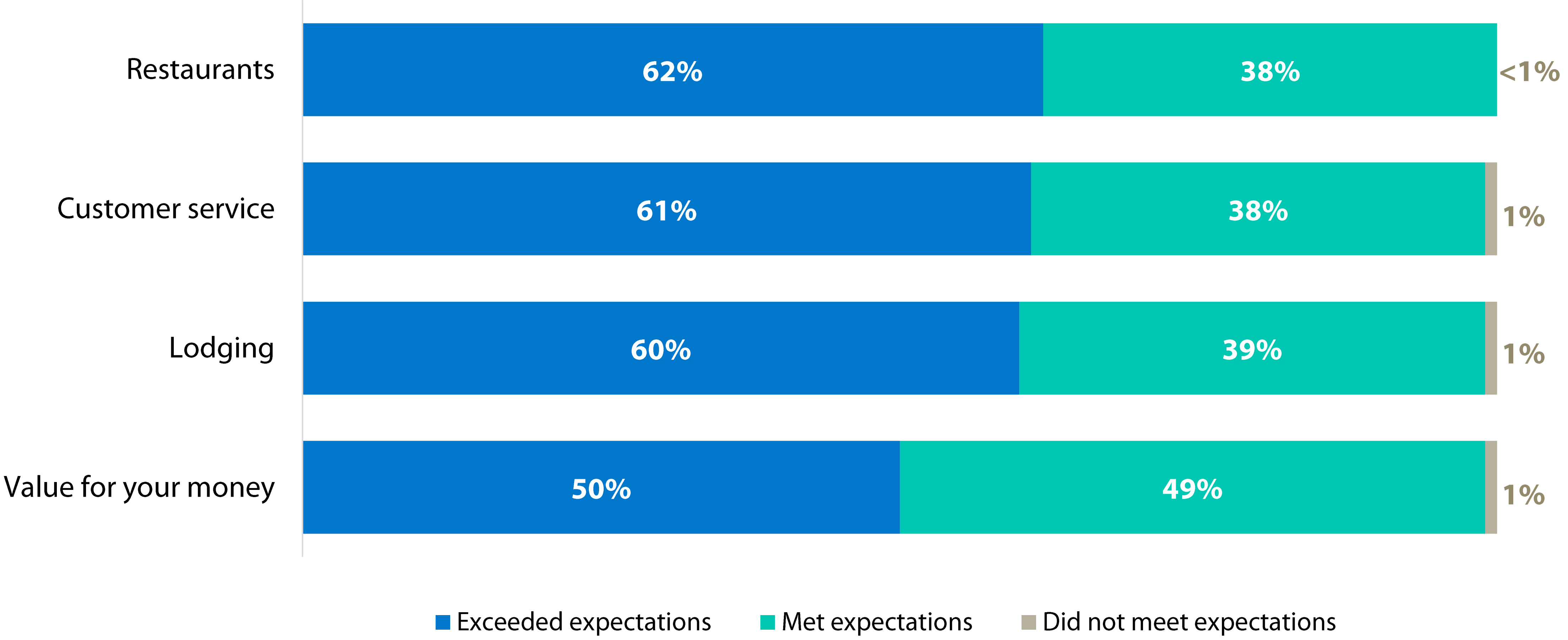
ECONOMIC IMPACT

VISITOR SATISFACTION

- **99%** of visitors were **satisfied or very satisfied** with their trip to the Pensacola area
- **Over 3 in 4** visitors were **very satisfied** with their trip to the Pensacola area
- Those who said somewhat satisfied, dissatisfied, or very dissatisfied were asked what features they liked least about the area, which included traffic and high prices

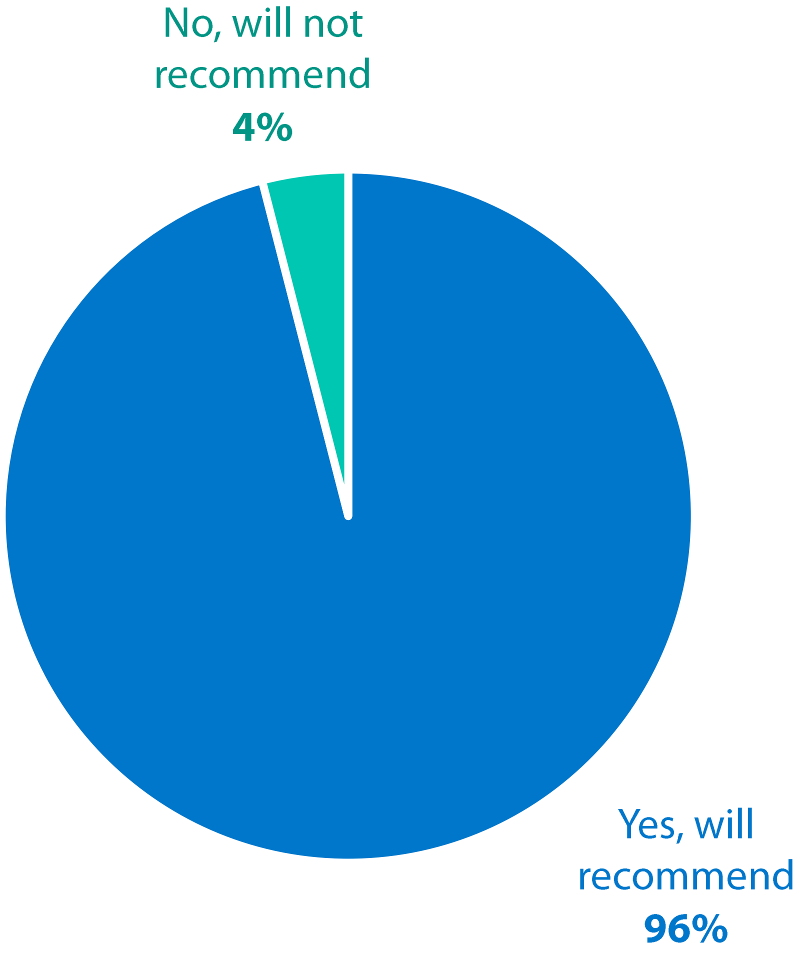


SATISFACTION RATINGS



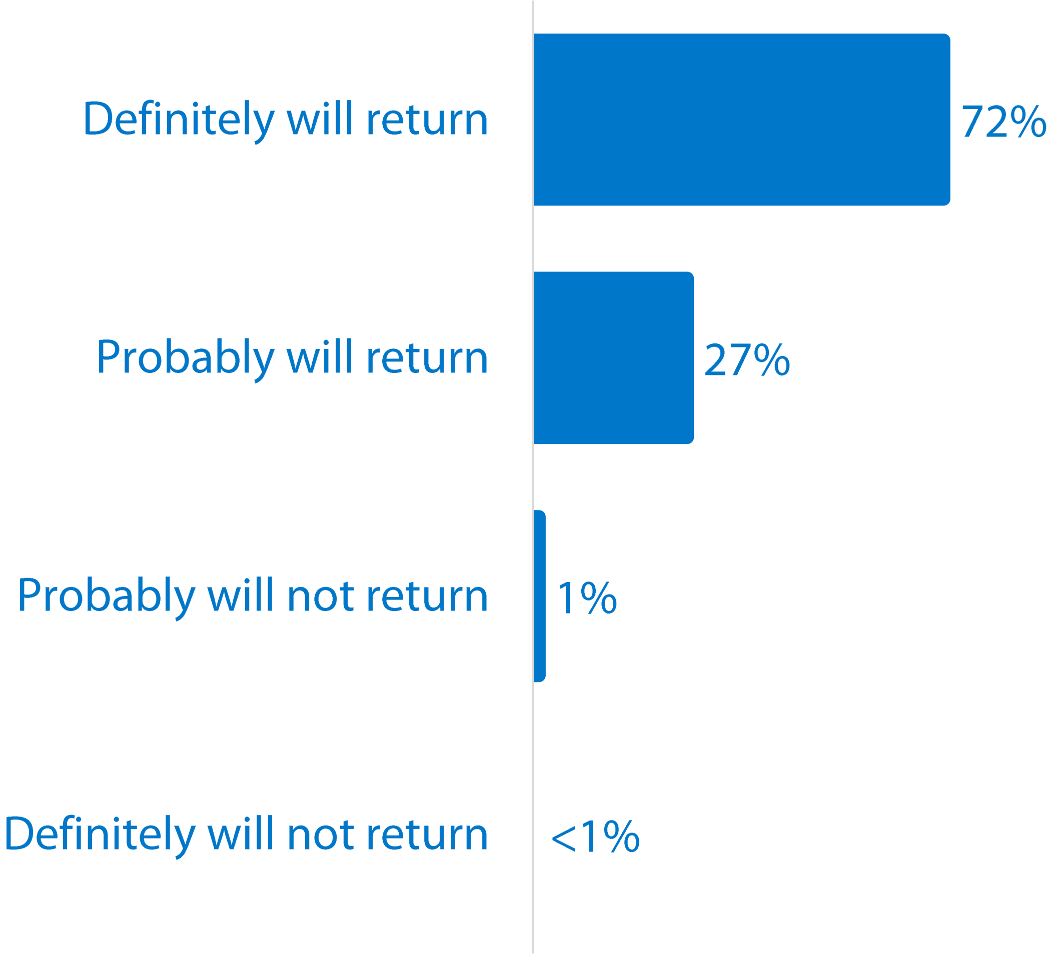
RECOMMENDATION

- **Over 9 in 10** visitors would recommend the Pensacola area to others



LIKELIHOOD OF RETURNING

- **99%** of visitors would **return** to the Pensacola area
- **Over 7 in 10** visitors would **definitely return** to the Pensacola area
- Those who said they will not return were asked why they were uncertain, the main reason being preference for a variety in vacation spots



QUARTERLY COMPARISONS

VISITOR JOURNEY: ECONOMIC IMPACT

PRE-VISIT

TRAVEL PARTY PROFILE

TRIP EXPERIENCE

POST TRIP EVALUATION

ECONOMIC IMPACT

KEY PERFORMANCE INDICATORS

	OCT – DEC 2024	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	FY 2025
Visitors	517,300	464,800	764,700	745,700	**2,492,500**
Direct Spending	$273,472,600	$234,186,100	$391,868,300	$445,970,200	**$1,345,497,200**
Room Nights[1]	521,700	556,900	728,700	696,100	**2,503,400**
TDT[2]	$4,236,624	$2,685,022	$6,105,246	$9,021,942	**$22,048,835**

[1] Source: Smith Travel Research and Department of Business and Professional Regulation.

[2] Sources: Clerk & Comptroller Escambia County.

LODGING METRICS

COMBINED LODGING METRICS	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
Occupancy	51.5%	55.5%	70.6%	66.2%	**61.1%**
ADR	$129.03	$122.30	$195.93	$190.66	**$159.88**
RevPAR	$66.50	$67.82	$138.34	$126.26	**$97.61**

HOTEL METRICS[1]	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
Occupancy	54.9%	57.0%	71.5%	67.1%	**62.6%**
ADR	$115.12	$116.18	$163.34	$160.01	**$138.66**
RevPAR	$63.25	$66.19	$116.82	$107.33	**$86.84**

VACATION RENTAL METRICS[2]	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
Occupancy	37.4%	49.8%	67.3%	63.2%	**54.4%**
ADR	$181.74	$145.07	$314.35	$300.89	**$235.51**
RevPAR	$67.97	$72.24	$211.57	$190.02	**$128.15**

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 and Department of Business and Professional Regulation (DBPR).

DAILY TRAVEL PARTY SPEND

	OCT – DEC 2024	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	FY 2025
Accommodations	$101	$98	$152	$152	**$131**
Restaurants	$85	$93	$109	$115	**$103**
Groceries	$14	$13	$20	$17	**$17**
Shopping	$35	$35	$36	$35	**$35**
Entertainment	$35	$42	$51	$43	**$44**
Transportation	$23	$20	$24	$26	**$24**
Other	$1	$1	$2	$1	**$1**
Total Daily Spend	$294	$302	$394	$389	**$355**

TOTAL TRAVEL PARTY SPEND

	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
Accommodations	$455	$461	$593	$608	**$550**
Restaurants	$383	$437	$425	$460	**$433**
Groceries	$63	$61	$78	$68	**$71**
Shopping	$158	$165	$140	$140	**$147**
Entertainment	$158	$197	$199	$172	**$185**
Transportation	$104	$94	$94	$104	**$101**
Other	$5	$5	$8	$4	**$4**
Total Trip Spend	$1,326	$1,420	$1,537	$1,556	**$1,491**

VISITOR JOURNEY: PRE-VISIT

PRE-VISIT

TRAVEL PARTY PROFILE

TRIP EXPERIENCE

POST TRIP EVALUATION

ECONOMIC IMPACT

TRIP PLANNING CYCLE

	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
A week or two	28%	25%	23%	25%	**25%**
A month or so	27%	28%	23%	24%	**25%**
2 months	16%	19%	19%	17%	**18%**
3 months	14%	13%	16%	16%	**15%**
4 to 5 months	7%	6%	10%	10%	**9%**
6 months or more	8%	9%	9%	8%	**8%**
Average Planning Cycle	57 days	58 days	64 days	62 days	**61 days**

ONLINE TRIP PLANNING SOURCES[1]

	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
Search sites (Google, etc.)	69%	76%	78%	73%	**74%**
Hotel websites/apps	26%	30%	31%	29%	**29%**
Vacation rental websites	19%	23%	27%	26%	**24%**
Airline websites/apps	19%	22%	26%	22%	**23%**
VisitPensacola.com	18%	21%	23%	22%	**21%**
Personal social media	21%	20%	20%	19%	**20%**
Trip planning website/app	12%	13%	14%	10%	**12%**
Online travel agency	11%	9%	15%	9%	**11%**
Online travel reviews	8%	8%	10%	9%	**9%**
Pensacola social media	7%	7%	9%	9%	**8%**
AI websites/apps (ChatGPT, etc.)[2]	-	-	2%	5%	**3%**
Video streaming services	1%	1%	2%	1%	**1%**
Music streaming services	1%	1%	1%	1%	**1%**
Other	4%	3%	2%	4%	**3%**

[1] Multiple responses permitted.

[2] AI websites/apps was added as an answer choice in May 2025.

OTHER TRIP PLANNING SOURCES[1]

	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
Friends/family	40%	43%	43%	43%	**42%**
Brochures/travel guides/visitor guides	5%	7%	9%	7%	**7%**
AAA	4%	3%	3%	4%	**4%**
Travel magazines	1%	1%	1%	1%	**1%**
Television	1%	1%	1%	1%	**1%**
Radio	1%	<1%	<1%	1%	**1%**
Travel agent	1%	1%	1%	1%	**1%**
Newspaper	<1%	<1%	1%	<1%	**<1%**
Other	3%	2%	2%	2%	**2%**
None of the above	51%	49%	47%	48%	**49%**

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[1] Multiple responses permitted.

VISITOR GUIDE

	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
Requested a print version	1%	1%	1%	1%	**1%**
Viewed it online	17%	22%	25%	25%	**23%**
Did not request/view a Visitors Guide for Pensacola area	82%	77%	74%	74%	**76%**

REASONS FOR VISITING[1]

	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
Beach	28%	27%	49%	50%	**41%**
Relax and unwind	28%	25%	35%	38%	**33%**
Visit friends/relatives	23%	22%	26%	26%	**25%**
Special occasion	14%	13%	20%	16%	**16%**
Special events	15%	14%	12%	13%	**13%**
Family time	13%	12%	11%	12%	**12%**
Art galleries/museums/etc.	8%	9%	10%	10%	**9%**
Attractions	7%	8%	7%	7%	**7%**
Restaurants	7%	7%	8%	7%	**7%**
Business meetings/conferences	5%	4%	4%	3%	**4%**
Water sports	3%	2%	5%	6%	**4%**
Sporting event	3%	9%	1%	1%	**3%**
Shopping	2%	2%	2%	2%	**2%**
Bars/nightclubs	2%	2%	2%	2%	**2%**
Golf/tennis	1%	1%	2%	1%	**1%**
Biking/hiking/running/etc.	1%	1%	2%	1%	**1%**
State parks	1%	1%	1%	1%	**1%**
Spas	<1%	<1%	1%	<1%	**<1%**
Other	7%	6%	7%	4%	**6%**

[1] Up to three responses permitted

ADVERTISING RECALL[1]

	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
Yes, saw ad about the Pensacola area	32%	37%	37%	35%	**35%**
No, did not see ad about the Pensacola area	56%	51%	49%	50%	**51%**
Not sure	12%	12%	14%	15%	**14%**

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

Pensacola FLORIDA THE WAY TO BEACH™

downs & st. germain RESEARCH

ADVERTISING SOURCES[1]

	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
Base: Visitors who recalled advertising	32%	37%	37%	35%	**35%**
VisitPensacola.com	29%	33%	36%	36%	**34%**
Personal social media	28%	32%	31%	30%	**30%**
Television	26%	21%	23%	22%	**23%**
Weather app	16%	13%	17%	14%	**15%**
Traveler reviews/blogs	12%	12%	16%	13%	**14%**
Visit Pensacola social media	11%	11%	15%	16%	**14%**
Rental agency/booking websites	6%	11%	16%	14%	**12%**
Online article	11%	9%	11%	13%	**11%**
Billboard	9%	11%	11%	10%	**10%**
Radio	10%	11%	9%	7%	**9%**
Travel/visitor guide	4%	6%	11%	10%	**8%**
Ad on a website	6%	6%	8%	6%	**7%**
Deal-based promotion	4%	5%	3%	3%	**4%**
AAA	3%	4%	4%	6%	**4%**
Brochure	2%	3%	3%	3%	**3%**
Video streaming services	1%	2%	2%	2%	**2%**
Music streaming services	1%	1%	<1%	1%	**1%**
Newspaper	1%	1%	1%	1%	**1%**
Magazine ad	1%	1%	1%	2%	**1%**
Magazine article	1%	1%	1%	1%	**1%**
Other	2%	2%	2%	2%	**2%**

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[1] Multiple responses permitted.

ADVERTISING INFLUENCE[1]

	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
Yes, ad influenced visit	17%	17%	17%	18%	**17%**
No, ad did not influence visit	14%	17%	19%	16%	**17%**
Not sure	1%	3%	1%	1%	**1%**
Do not recall seeing advertising, promotions, or travel stories about the Pensacola area	68%	63%	63%	65%	**65%**

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

VISITOR JOURNEY: TRAVEL PARTY PROFILE

PRE-VISIT

TRAVEL PARTY PROFILE

TRIP EXPERIENCE

POST TRIP EVALUATION

ECONOMIC IMPACT

REGION OF ORIGIN[1]

	OCT – DEC 2024	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	FY 2025
Southeast	51%	49%	48%	53%	**51%**
Midwest	18%	23%	21%	18%	**20%**
Florida	16%	14%	14%	14%	**14%**
West	6%	6%	8%	7%	**7%**
Northeast	6%	6%	7%	6%	**6%**
International	3%	2%	2%	2%	**2%**

[1] Sources: Zartico and Visitor Tracking Study.

TOP STATES OF ORIGIN[1]

	OCT – DEC 2024	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	FY 2025
Florida	16%	14%	14%	14%	**14%**
Alabama	15%	13%	13%	14%	**14%**
Texas	7%	7%	7%	8%	**8%**
Georgia	6%	6%	6%	7%	**6%**
Louisiana	4%	6%	7%	7%	**6%**
Tennessee	6%	4%	5%	5%	**5%**
Mississippi	5%	5%	5%	5%	**5%**
Missouri	2%	3%	3%	3%	**3%**
Kentucky	3%	2%	3%	2%	**3%**
North Carolina	2%	3%	2%	3%	**3%**
Ohio	3%	2%	2%	2%	**2%**
Illinois	2%	3%	2%	2%	**2%**
Indiana	3%	2%	2%	2%	**2%**
Michigan	2%	3%	2%	1%	**2%**
Arkansas	2%	2%	2%	2%	**2%**
Wisconsin	2%	3%	2%	1%	**2%**
Pennsylvania	1%	2%	2%	2%	**2%**
Virginia	2%	2%	2%	2%	**2%**
Oklahoma	1%	2%	2%	2%	**2%**

Pensacola FLORIDA THE WAY TO BEACH™

[1] Sources: Zartico and Visitor Tracking Study.

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TOP ORIGIN MARKETS[1]

	OCT – DEC 2024	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	FY 2025
Mobile[2]	15%	14%	14%	15%	**15%**
Atlanta	4%	4%	4%	5%	**5%**
New Orleans	3%	3%	4%	4%	**3%**
Birmingham	3%	3%	3%	3%	**3%**
Nashville	3%	2%	3%	3%	**3%**
Dallas – Fort Worth	2%	2%	3%	3%	**3%**
Houston	2%	2%	1%	2%	**2%**
Montgomery	2%	2%	1%	2%	**2%**

[1] Sources: Zartico and Visitor Tracking Study.
[2] Mobile DMA spans across Florida, Alabama, and Mississippi.

TRAVEL PARTY

TRAVEL PARTY SIZE	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
Paid accommodations[1]	2.8	2.8	3.1	3.1	**3.0**
Nonpaid accommodations[2]	2.0	2.1	2.1	2.2	**2.1**
Day trippers	2.8	2.8	2.9	2.9	**2.8**
All visitors[3]	2.6	2.7	2.9	2.9	**2.8**

CHILDREN[4]	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
Traveled with children	41%	44%	51%	48%	**47%**
Did not travel with children	59%	56%	49%	52%	**53%**

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

[2] Visitors staying with friends/family or in a personal second home.

[3] Includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.

[4] Children are considered people under the age of 20.

VISITOR DEMOGRAPHICS[1]

GENDER	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
Female	62%	60%	61%	62%	**61%**
Male	38%	40%	38%	38%	**39%**
Transgender/Non-conforming	<1%	<1%	1%	<1%	**<1%**

AGE	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
Under 35	26%	28%	27%	27%	**27%**
35 to 49	34%	34%	37%	35%	**35%**
50 to 65	27%	24%	26%	27%	**26%**
Over 65	13%	14%	10%	11%	**12%**
Median Age	46	45	44	45	**45**

HOUSEHOLD INCOME	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
Less than $50,000	17%	21%	17%	17%	**18%**
$50,000 to $99,000	46%	43%	42%	45%	**44%**
$100,000 to $149,000	24%	23%	29%	25%	**26%**
$150,000 to $199,000	8%	9%	8%	9%	**8%**
$200,000 to $399,000	4%	3%	3%	3%	**3%**
$400,000 or more	1%	1%	1%	1%	**1%**
Median Income	$85,900	$83,700	$89,300	$86,700	**$86,400**

[1] Gender and age of the member of 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.

NEW & RETURNING VISITORS

NUMBER OF VISITS	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
This was my first time	25%	23%	23%	21%	**23%**
2 – 3	21%	23%	18%	19%	**20%**
4 – 5	13%	16%	15%	14%	**14%**
6 – 10	11%	12%	12%	13%	**12%**
11 – 20	10%	9%	12%	11%	**11%**
21 or more	20%	17%	20%	22%	**20%**

VISITOR JOURNEY: TRIP EXPERIENCE

PRE-VISIT

TRAVEL PARTY PROFILE

TRIP EXPERIENCE

POST TRIP EVALUATION

ECONOMIC IMPACT

TRANSPORTATION

	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
Drive	84%	84%	80%	82%	**82%**
Pensacola International Airport	15%	15%	19%	17%	**17%**
Northwest Florida Regional Airport	1%	1%	1%	1%	**1%**
Mobile Regional Airport	<1%	<1%	<1%	<1%	**<1%**
Gulfport-Biloxi International Airport	<1%	<1%	<1%	<1%	**<1%**
Northwest Florida Beaches International Airport	<1%	<1%	<1%	<1%	**<1%**
Other	<1%	<1%	<1%	<1%	**<1%**

ACCOMMODATIONS & LENGTH OF STAY

ACCOMODATIONS	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
Hotel/motel/resort	33%	36%	39%	38%	**37%**
Vacation rental home[1]	19%	21%	25%	24%	**23%**
Friends/family home	17%	13%	10%	11%	**12%**
Personal second home	2%	3%	3%	3%	**3%**
Campground/RV Park	3%	2%	2%	3%	**2%**
Bed & Breakfast/Inn	<1%	<1%	<1%	<1%	**<1%**
Marina	<1%	<1%	<1%	<1%	**<1%**
Other	<1%	<1%	<1%	<1%	**<1%**
Not spending the night	26%	25%	21%	21%	**23%**

LENGTH OF STAY	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
Paid accommodations[2]	5.1	5.6	4.5	4.5	**4.8**
Nonpaid accommodations[3]	7.5	7.2	5.6	6.0	**6.4**
Average Length of Stay[4]	4.5	4.7	3.9	4.0	**4.2**

[1] Includes Airbnb, Vrbo, etc.

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

[3] Visitors staying with friends/family or in a personal second home.

[4] Includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.

ACCOMMODATION BOOKING

	OCT – DEC 2024	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	FY 2025
Directly with the hotel/condo	51%	50%	50%	50%	**50%**
Airbnb	19%	10%	20%	21%	**18%**
Online travel agency	2%	21%	19%	17%	**15%**
Vacation rental company	21%	13%	5%	4%	**10%**
Vrbo	4%	4%	5%	6%	**5%**
Other	3%	2%	1%	2%	**2%**

VISITOR ACTIVITIES[1]

	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
Restaurants	83%	88%	84%	83%	**84%**
Relax and unwind	72%	74%	77%	78%	**76%**
Beach	65%	66%	77%	76%	**72%**
Shopping	42%	50%	51%	50%	**49%**
Art galleries/museums/etc.	34%	38%	37%	34%	**36%**
Attractions	29%	37%	39%	36%	**36%**
Visit friends/relatives	33%	34%	35%	32%	**34%**
Family time	37%	35%	31%	30%	**33%**
Bars/nightclubs	29%	31%	35%	33%	**32%**
Special events	26%	26%	23%	25%	**25%**
Water sports	13%	12%	25%	11%	**20%**
Special occasion	17%	16%	18%	16%	**17%**
State parks	11%	13%	13%	11%	**12%**
Biking/hiking/running/etc.	10%	16%	12%	9%	**11%**
Sporting event	4%	11%	6%	6%	**7%**
Golf/tennis	6%	8%	5%	4%	**5%**
Business meetings/conferences	5%	4%	4%	3%	**4%**
Spas	3%	4%	4%	3%	**3%**
Other	4%	2%	4%	2%	**3%**

[1] Multiple responses permitted.

BEACHES VISITED[1]

	OCT – DEC 2024	JAN – MAR 2025	APR – JUN 2025	JUL – SEP 2025	FY 2025
Pensacola Beach	83%	88%	80%	83%	**83%**
Perdido Key	25%	18%	28%	23%	**24%**
Gulf Islands National Seashore	8%	7%	8%	7%	**8%**
Other	1%	1%	1%	1%	**1%**

[1] Multiple responses permitted.

VISITOR JOURNEY: POST TRIP EVALUATION

PRE-VISIT

TRAVEL PARTY PROFILE

TRIP EXPERIENCE

POST TRIP EVALUATION

ECONOMIC IMPACT

VISITOR SATISFACTION

TRIP SATISFACTION	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
Very satisfied	77%	76%	79%	77%	**77%**
Satisfied	22%	23%	20%	22%	**22%**
Somewhat satisfied[1]	1%	1%	1%	1%	**1%**
Dissatisfied[1]	<1%	<1%	<1%	<1%	**<1%**
Very dissatisfied[1]	<1%	<1%	<1%	<1%	**<1%**

EXCEEDED EXPECTATIONS	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
Restaurants	61%	65%	63%	60%	**62%**
Customer service	63%	66%	61%	56%	**61%**
Lodging	59%	61%	61%	59%	**60%**
Value for your money	49%	54%	50%	47%	**50%**

[1] Those who said somewhat satisfied, dissatisfied, or very dissatisfied were asked what features they liked least about the area.

LIKELIHOOD TO RETURN & RECOMMEND

LIKELIHOOD TO RETURN	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
Definitely will return	74%	72%	72%	71%	**72%**
Probably will return	25%	27%	27%	28%	**27%**
Probably will not return[1]	1%	1%	1%	1%	**1%**
Definitely will not return[1]	<1%	<1%	<1%	<1%	**<1%**

RECOMMEND THE PENSACOLA AREA	OCT - DEC 2024	JAN - MAR 2025	APR - JUN 2025	JUL - SEP 2025	FY 2025
Yes, will recommend	96%	96%	96%	97%	**96%**
No, will not recommend	4%	4%	4%	3%	**4%**

YEARLY COMPARISONS

VISITOR JOURNEY: ECONOMIC IMPACT


PRE-VISIT

TRAVEL PARTY PROFILE

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ECONOMIC IMPACT

KEY PERFORMANCE INDICATORS

	FY 2024	FY 2025	% Δ
Visitors[1]	2,564,000	2,492,500	-2.8%
Direct Spending	$1,322,316,900	$1,345,497,200	+1.8%
Room Nights[2]	2,483,700	2,503,400	+0.8%
TDT[3]	$22,023,172	$22,048,835	+0.1%

[1] Source: Smith Travel Research and Department of Business and Professional Regulation.

[2] Sources: Clerk & Comptroller Escambia County.

LODGING METRICS

COMBINED LODGING METRICS	FY 2024	FY 2025	% Δ
Occupancy	60.8%	61.1%	+0.4%
ADR	$157.61	$159.88	+1.4%
RevPAR	$95.86	$97.61	+1.8%

HOTEL METRICS[1]	FY 2024	FY 2025	% Δ
Occupancy	62.7%	62.6%	-
ADR	$136.89	$138.66	+1.3%
RevPAR	$85.77	$86.84	+1.2%

VACATION RENTAL METRICS[2]	FY 2024	FY 2025	% Δ
Occupancy	54.9%	54.4%	-0.9%
ADR	$228.29	$235.51	+3.2%
RevPAR	$125.31	$128.15	+2.3%

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 and Department of Business and Professional Regulation (DBPR).

DAILY TRAVEL PARTY SPEND

	FY 2024	FY 2025	Δ
Accommodations[1]	$127	$131	+$4
Restaurants	$93	$103	+10
Groceries	$18	$17	-$1
Shopping	$36	$35	-$1
Entertainment	$41	$44	+$3
Transportation	$26	$24	-$2
Other	$2	$1	-$1
Total Daily Spend	**$343**	**$355**	**+$12**

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

TOTAL TRAVEL PARTY SPEND

	FY 2024	FY 2025	Δ
Accommodations[1]	$546	$550	+$4
Restaurants	$400	$433	+$33
Groceries	$77	$71	-$6
Shopping	$155	$147	-$8
Entertainment	$176	$185	+$9
Transportation	$112	$101	-$11
Other	$9	$4	-$5
Total Trip Spend	**$1,475**	**$1,491**	**+$16**

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

VISITOR JOURNEY: PRE-VISIT

PRE-VISIT

TRAVEL PARTY PROFILE

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TRIP PLANNING CYCLE

	FY 2024	FY 2025	Δ
A week or two	28%	25%	-3.0%
A month or so	26%	25%	-1.0%
2 months	18%	18%	-
3 months	14%	15%	+1.0%
4 to 5 months	7%	9%	+2.0%
6 months or more	7%	8%	+1.0%
Average Planning Cycle	56 days	61 days	+4 days

ONLINE TRIP PLANNING SOURCES[1]

	FY 2024	FY 2025	Δ
Search sites (Google, etc.)	73%	74%	+1.0%
Hotel websites/apps	26%	29%	+3.0%
Vacation rental websites	25%	24%	-1.0%
Airline websites/apps	22%	23%	+1.0%
VisitPensacola.com	17%	21%	+4.0%
Personal social media	19%	20%	+1.0%
Trip planning website/app	15%	12%	-3.0%
Online travel agency	14%	11%	-3.0%
Online travel reviews	6%	9%	+3.0%
Pensacola social media	9%	8%	-1.0%
AI websites/apps (ChatGPT, etc.)	-	3%	-
Video streaming services	2%	1%	-1.0%
Music streaming services	2%	1%	-1.0%
Other	4%	3%	-1.0%

[1] Multiple responses permitted.

[2] AI websites/apps was added as an answer choice in May 2025.

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OTHER TRIP PLANNING SOURCES[1]

	FY 2024	FY 2025	Δ
Friends/family	37%	42%	+5.0%
Brochures/travel guides/visitor guides	12%	7%	-5.0%
AAA	3%	4%	+1.0%
Travel magazines	1%	1%	-
Television	1%	1%	-
Radio	1%	1%	-
Travel agent	1%	1%	-
Newspaper	1%	<1%	-1.0%
Other	3%	2%	-1.0%
None of the above	50%	49%	-1.0%

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[1] Multiple responses permitted.

VISITOR GUIDE

	FY 2024	FY 2025	Δ
Requested a print version	2%	1%	-1.0%
Viewed it online	17%	23%	+6.0%
Did not request or view a Visitors Guide for Pensacola area	81%	76%	-5.0%

REASONS FOR VISITING[1]

	FY 2024	FY 2025	Δ
Beach	38%	41%	+3.0%
Relax and unwind	34%	33%	-1.0%
Visit friends/relatives	23%	25%	+2.0%
Special occasion	14%	16%	+2.0%
Special events	10%	13%	+3.0%
Family time	13%	12%	-1.0%
Art galleries/museums/etc.	7%	9%	+2.0%
Attractions	14%	7%	-7.0%
Restaurants	11%	7%	-4.0%
Business meetings/conferences	6%	4%	-2.0%
Water sports	4%	4%	-
Sporting event	2%	3%	+1.0%
Shopping	3%	2%	-1.0%
Bars/nightclubs	3%	2%	-1.0%
Biking/hiking/running/etc.	3%	1%	-2.0%
State parks	2%	1%	-1.0%
Golf/tennis	1%	1%	-
Spas	1%	<1%	-1.0%
Other	8%	6%	-2.0%

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[1] Multiple responses permitted.

ADVERTISING RECALL[1]

	FY 2024	FY 2025	Δ
Yes, saw ad about the Pensacola area	28%	35%	+7.0%
No, did not see ad about the Pensacola area	62%	51%	-11.0%
Not sure	10%	14%	+4.0%

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[1] Note: 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 SOURCES[1]

	FY 2024	FY 2025	Δ
Base: Visitors who recalled advertising	28%	35%	+7.0%
VisitPensacola.com	23%	34%	+11.0%
Personal social media	30%	30%	-
Television	25%	23%	-2.0%
Weather app	10%	15%	+5.0%
Visit Pensacola social media	13%	14%	+1.0%
Traveler reviews/blogs	7%	14%	+7.0%
Rental agency/booking websites	6%	12%	+6.0%
Online article	10%	11%	+1.0%
Billboard	10%	10%	-
Radio	10%	9%	-1.0%
Travel/visitor guide	9%	8%	-1.0%
Ad on a website	10%	7%	-3.0%
Deal-based promotion	6%	4%	-2.0%
AAA	2%	4%	+2.0%
Brochure	5%	3%	-2.0%
Video streaming services	4%	2%	-2.0%
Magazine ad	3%	1%	-2.0%
Newspaper	2%	1%	-1.0%
Magazine article	2%	1%	-1.0%
Music streaming services	1%	1%	-
Other	3%	2%	-1.0%

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[1] Multiple responses permitted.

ADVERTISING INFLUENCE[1]

	FY 2024	FY 2025	Δ
Yes, ad influenced visit	12%	17%	+5.0%
No, ad did not influence visit	15%	17%	+2.0%
Not sure	1%	1%	-
Do not recall seeing advertising, promotions, or travel stories about the Pensacola area	72%	65%	-7.0%

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

VISITOR JOURNEY: TRAVEL PARTY PROFILE

PRE-VISIT

TRAVEL PARTY PROFILE

TRIP EXPERIENCE

POST TRIP EVALUATION

ECONOMIC IMPACT

REGION OF ORIGIN[1]

	FY 2024	FY 2025	Δ
Southeast	45%	51%	+6.0%
Midwest	20%	20%	-
Florida	17%	14%	-3.0%
West	8%	7%	-1.0%
Northeast	7%	6%	-1.0%
International	3%	2%	-1.0%

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[1] Sources: Visitor Tracking and Zartico.

TOP STATES OF ORIGIN[1]

	FY 2024	FY 2025	Δ
Florida	17%	14%	-3.0%
Alabama	12%	14%	+2.0%
Texas	7%	8%	+1.0%
Georgia	6%	6%	-
Louisiana	4%	6%	+2.0%
Tennessee	5%	5%	-
Mississippi	3%	5%	+2.0%
Missouri	3%	3%	-
Kentucky	2%	3%	+1.0%
North Carolina	3%	3%	-
Ohio	3%	2%	-1.0%
Illinois	3%	2%	-1.0%
Indiana	2%	2%	-
Michigan	2%	2%	-
Arkansas	2%	2%	-
Wisconsin	2%	2%	-
Pennsylvania	2%	2%	-
Virginia	2%	2%	-
Oklahoma	2%	2%	-

[1] Sources: Visitor Tracking and Zartico.

TOP VISITOR ORIGIN MARKETS[1]

	FY 2024	FY 2025	Δ
Mobile[2]	17%	15%	-2.0%
Atlanta	4%	4%	-
New Orleans	2%	3%	+1.0%
Birmingham	2%	3%	+1.0%
Nashville	3%	3%	-
Dallas – Fort Worth	3%	3%	-
Houston	2%	2%	-
Montgomery	1%	2%	+1.0%

[1] Sources: Visitor Tracking and Zartico.

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

Pensacola FLORIDA THE WAY TO BEACH™

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TRAVEL PARTY

TRAVEL PARTY SIZE	FY 2024	FY 2025	Δ
Paid accommodations[1]	3.2	3.0	-0.2
Nonpaid accommodations[2]	2.2	2.1	-0.1
Day trippers	3.0	2.8	-0.2
All visitors[3]	3.0	2.8	-0.2

CHILDREN[4]	FY 2024	FY 2025	Δ
Traveled with children	42%	47%	+5.0%
Did not travel with children	58%	53%	-5.0%

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

[2] Visitors staying with friends/family or in a personal second home.

[3] Includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.

[4] Children are considered people under the age of 20.

VISITOR DEMOGRAPHICS[1]

GENDER	FY 2024	FY 2025	Δ
Female	60%	61%	+1.0%
Male	40%	39%	-1.0%
Transgender/Non-conforming	<1%	<1%	-

AGE	FY 2024	FY 2025	Δ
Under 35	31%	27%	-4.0%
35 to 49	32%	35%	+3.0%
50 to 65	25%	26%	+1.0%
Over 65	12%	12%	-
Median Age	44	45	+1

HOUSEHOLD INCOME	FY 2024	FY 2025	Δ
Less than $50,000	21%	18%	-3.0%
$50,000 to $99,000	42%	44%	+2.0%
$100,000 to $149,000	23%	26%	+3.0%
$150,000 to $199,000	9%	8%	-1.0%
$200,000 to $399,000	4%	3%	-1.0%
$400,000 or more	1%	1%	-
Median Income	$84,500	$86,400	+$1,900

[1] Gender and age of the member of 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.

NEW & RETURNING VISITORS

NUMBER OF VISITS	FY 2024	FY 2025	Δ
This was my first time	27%	23%	-4.0%
2-3	22%	20%	-2.0%
4-5	14%	14%	-
6-10	11%	12%	+1.0%
11-20	8%	11%	+3.0%
21 or more	18%	20%	+2.0%

VISITOR JOURNEY: TRIP EXPERIENCE

PRE-VISIT

TRAVEL PARTY PROFILE

TRIP EXPERIENCE

POST TRIP EVALUATION

ECONOMIC IMPACT

TRANSPORTATION

	FY 2024	FY 2025	Δ
Drive	82%	82%	-
Pensacola International Airport	17%	17%	-
Northwest Florida Regional Airport	1%	1%	-
Mobile Regional Airport	<1%	<1%	-
Northwest Florida Beaches International Airport	<1%	<1%	-
Gulfport-Biloxi International Airport	<1%	<1%	-
Other	<1%	<1%	-

ACCOMMODATIONS & LENGTH OF STAY

ACCOMODATIONS	FY 2024	FY 2025	Δ
Hotel/motel/resort	35%	37%	+2.0%
Vacation rental home[1]	21%	23%	+2.0%
Friends/family home	12%	12%	-
Personal second home	4%	3%	-1.0%
Campground/RV Park	3%	2%	-1.0%
Bed & Breakfast/Inn	<1%	<1%	-
Marina	2%	<1%	-2.0%
Other	<1%	<1%	-
Not spending the night	23%	23%	-

LENGTH OF STAY	FY 2024	FY 2025	Δ
Paid accommodations[2]	5.0	4.8	-0.2
Nonpaid accommodations[3]	6.9	6.4	-0.5
Average Length of Stay[4]	4.3	4.2	-0.1

[1] Includes Airbnb, Vrbo, etc.

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

[3] Visitors staying with friends/family or in a personal second home.

[4] Includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.

*Includes Airbnb, Vrbo, etc.

ACCOMMODATION BOOKING

	FY 2024	FY 2025	Δ
Directly with the hotel/condo	49%	50%	+1.0%
Airbnb	21%	18%	-3.0%
Online travel agency	17%	15%	-2.0%
Vacation rental company	3%	10%	+7.0%
Vrbo	7%	5%	-2.0%
Other	3%	2%	-1.0%

VISITOR ACTIVITIES[1]

	FY 2024	FY 2025	Δ
Restaurants	84%	84%	-
Relax and unwind	74%	76%	+2.0%
Beach	73%	72%	-1.0%
Shopping	39%	49%	+10.0%
Art galleries/museums/etc.	35%	36%	+1.0%
Attractions	32%	36%	+4.0%
Visit friends/relatives	32%	34%	+2.0%
Family time	35%	33%	-2.0%
Bars/nightclubs	26%	32%	+6.0%
Special events	19%	25%	+6.0%
Water sports	20%	20%	-
Special occasion	16%	17%	+1.0%
State parks	15%	12%	-3.0%
Biking/hiking/running/etc.	14%	11%	-3.0%
Sporting event	4%	7%	+3.0%
Golf/tennis	8%	5%	-3.0%
Business meetings/conferences	6%	4%	-2.0%
Spas	5%	3%	-2.0%
Other	5%	3%	-2.0%

[1] Multiple responses permitted.

BEACHES VISITED[1]

	FY 2024	FY 2025	Δ
Pensacola Beach	84%	83%	-1.0%
Perdido Key	24%	24%	-
Gulf Islands National Seashore	7%	8%	+1.0%
Other	1%	1%	-

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[1] Multiple responses permitted.

VISITOR JOURNEY: POST TRIP EVALUATION

PRE-VISIT

TRAVEL PARTY PROFILE

TRIP EXPERIENCE

POST TRIP EVALUATION

ECONOMIC IMPACT

VISITOR SATISFACTION

TRIP SATISFACTION	FY 2024	FY 2025	Δ
Very satisfied	77%	77%	-
Satisfied	22%	22%	-
Somewhat satisfied[1]	1%	1%	-
Dissatisfied[1]	<1%	<1%	-
Very dissatisfied[1]	<1%	<1%	-

EXCEEDED EXPECTATIONS	FY 2024	FY 2025	Δ
Restaurants	65%	62%	-3.0%
Customer service	66%	61%	-5.0%
Lodging	63%	60%	-3.0%
Value for your money	52%	50%	-2.0%

[1] Those who said somewhat satisfied, dissatisfied, or very dissatisfied were asked what features they liked least about the area.

LIKELIHOOD TO RETURN & RECOMMEND

LIKELIHOOD TO RETURN	FY 2024	FY 2025	Δ
Definitely will return	71%	72%	+1.0%
Probably will return	27%	27%	-
Probably will not return[1]	2%	1%	-1.0%
Definitely will not return[1]	<1%	<1%	-

RECOMMEND THE PENSACOLA AREA	FY 2024	FY 2025	Δ
Yes, will recommend	94%	96%	+2.0%
No, will not recommend	6%	4%	-2.0%

VISIT PENSACOLA

Visitor Tracking Study
FY2025
October 2024 – September 2025

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