

VISIT PENSACOLA

VISITOR TRACKING STUDY

JANUARY-MARCH 2026



METHODOLOGY



Interviews were completed in-person and online with **1,038** visitors between **January 1 and March 31, 2026**.

In-person surveying locations included:

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

ECONOMIC IMPACT SUMMARY



KEY PERFORMANCE INDICATORS

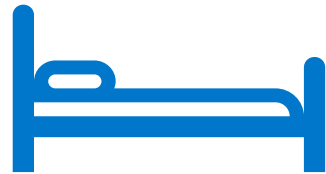
JANUARY TO MARCH 2026



513,500

TOTAL
VISITORS

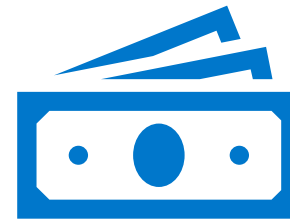
vs. 2025 ↑ 10.5%



605,800

ROOM
NIGHTS¹

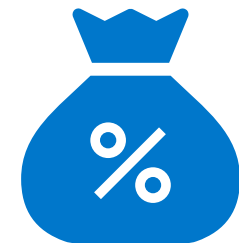
↑ 8.8%



\$282,744,500

DIRECT
SPENDING

↑ 13.5%



\$2,884,032

TOURIST
DEVELOPMENT TAX²

↑ 7.4%

LODGING METRICS

JANUARY TO MARCH 2026

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

COMBINED



58.4%

OCCUPANCY

↑ 5.3%



\$124.01

AVERAGE DAILY
RATE

↑ 1.4%



\$72.45

REVENUE PER
AVAILABLE ROOM

↑ 6.8%

HOTELS¹



61.0%

OCCUPANCY

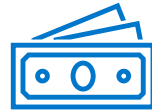
↑ 7.4%



\$117.01

AVERAGE DAILY
RATE

↑ 1.0%



\$71.39

REVENUE PER
AVAILABLE ROOM

↑ 8.5%

VACATION RENTALS²



49.5%

OCCUPANCY

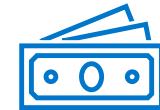
↑ 6.2%



\$148.07

AVERAGE DAILY
RATE

↑ 1.0%



\$73.31

REVENUE PER
AVAILABLE ROOM

↑ 7.2%

vs. 2025

DAILY TRAVEL PARTY SPENDING

JANUARY TO MARCH 2026

	ALL VISITORS ¹ 2025	ALL VISITORS ¹ 2026
Accommodations ¹	\$73	\$77
Restaurants	\$93	\$107
Groceries	\$13	\$15
Shopping	\$35	\$39
Entertainment	\$42	\$41
Transportation	\$20	\$22
Other	\$1	\$1
Daily Spending	\$277	\$302

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

TOTAL TRAVEL PARTY SPENDING

JANUARY TO MARCH 2026

	ALL VISITORS ¹ 2025	ALL VISITORS ¹ 2026
Accommodations ¹	\$343	\$331
Restaurants	\$437	\$460
Groceries	\$61	\$65
Shopping	\$165	\$168
Entertainment	\$197	\$176
Transportation	\$94	\$95
Other	\$5	\$4
Total Spending	\$1,302	\$1,299

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

	JANUARY – MARCH 2025	JANUARY – MARCH 2026	% Δ
Visitors	464,800	513,500	+10.5%
Direct Spending	\$249,104,300	\$282,744,500	+13.5%
Room Nights ¹	556,900	605,800	+8.8%
TDT ²	\$2,685,022	\$2,884,032	+7.4%

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

² Sources: Clerk & Comptroller Escambia County.

LODGING METRICS YOY

JANUARY TO MARCH 2026

COMBINED LODGING METRICS	JANUARY – MARCH 2025	JANUARY – MARCH 2026	% Δ
Occupancy	55.5%	58.4%	+5.3%
ADR	\$122.30	\$124.01	+1.4%
RevPAR	\$67.82	\$72.45	+6.8%

HOTEL METRICS ¹	JANUARY – MARCH 2025	JANUARY – MARCH 2026	% Δ
Occupancy	56.8%	61.0%	+7.4%
ADR	\$115.85	\$117.01	+1.0%
RevPAR	\$65.82	\$71.39	+8.5%

VACATION RENTAL METRICS ²	JANUARY – MARCH 2025	JANUARY – MARCH 2026	% Δ
Occupancy	46.6%	49.5%	+6.2%
ADR	\$146.63	\$148.07	+1.0%
RevPAR	\$68.37	\$73.31	+7.2%

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

¹ Source: Smith Travel Research.

² Source: Key Data.

VISITOR PROFILE SUMMARY





28%
Viewed Visitor Guide

19%
First-time Visitor

2.6
Travel Party Size²

83%
Drove

31%
Traveled with children¹

4.3
Length of Stay²

¹Children are defined as people under 20 years old.

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



Paid accommodations¹
62%
(59% in 2025)



Day trippers
24%
(25% in 2025)

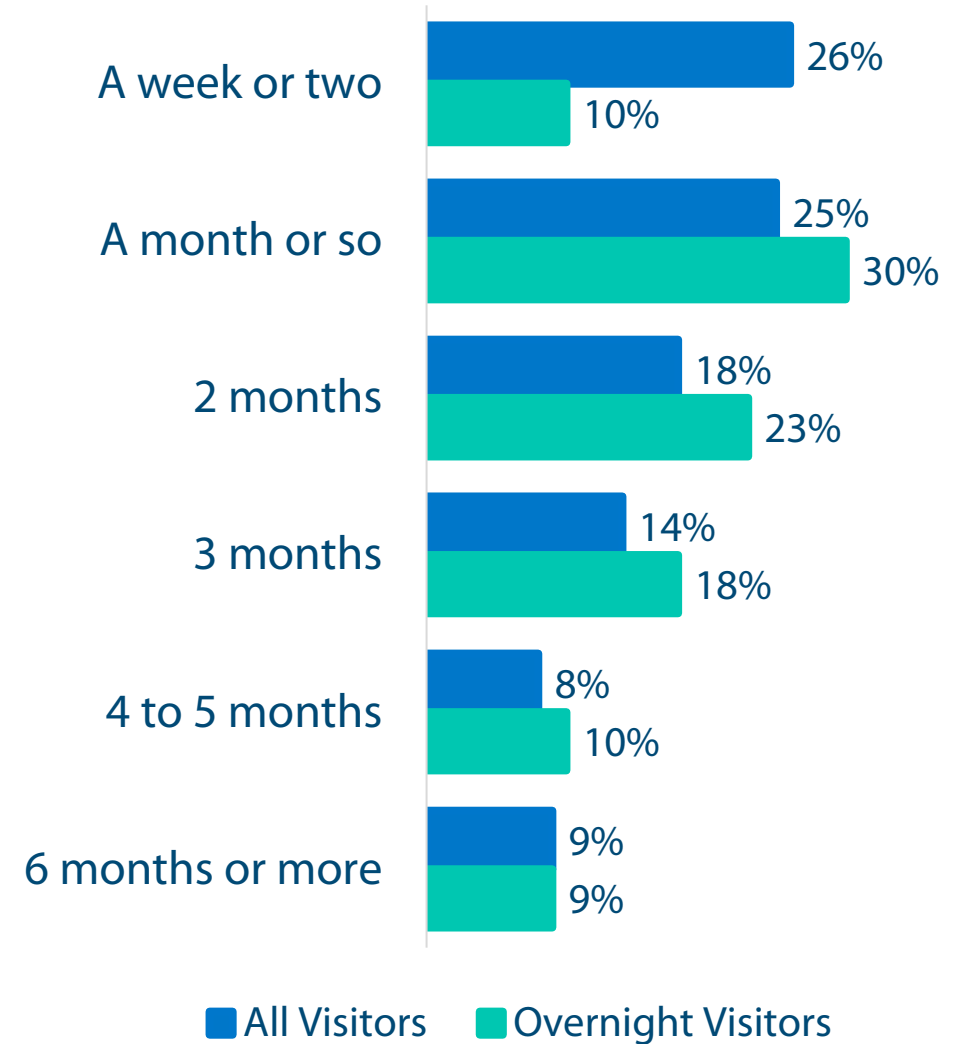


Nonpaid accommodations²
14%
(16% in 2025)

TRIP PLANNING CYCLE

JANUARY TO MARCH 2026

- » On average, visitors¹ planned their trip to the Pensacola area **60 days (about two months) in advance** (58 days in 2025)
- » Visitors staying overnight² had a slightly longer trip planning period of **69 days (over two months) in advance** (66 days in 2025)



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

²Includes visitors staying in paid accommodations and nonpaid accommodations.

TOP TRIP PLANNING SOURCES¹

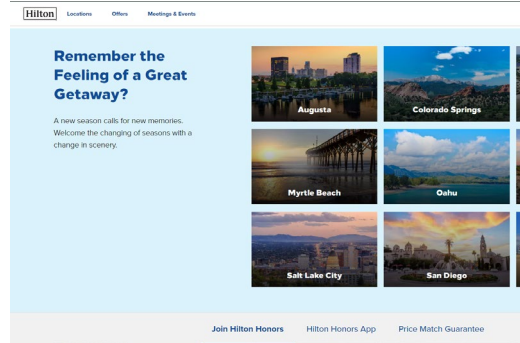
JANUARY TO MARCH 2026



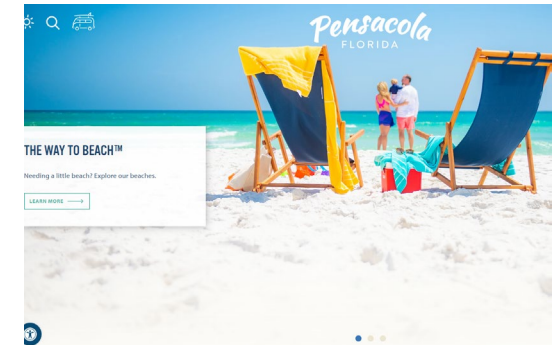
Search sites
72%
(76% in 2025)



Friends/family
41%
(43% in 2025)



Hotel websites/apps
30%
(30% in 2025)



VisitPensacola.com
26%
(21% in 2025)



Personal social media
22%
(20% in 2025)



Vacation rental websites
21%
(23% in 2025)



Airline websites/apps
21%
(22% in 2025)

¹ Multiple responses permitted.

TOP REASONS FOR VISITING¹

JANUARY TO MARCH 2026



Beach
32%
(27% in 2025)



Relax and unwind
27%
(25% in 2025)



Visit friends/relatives
22%
(22% in 2025)



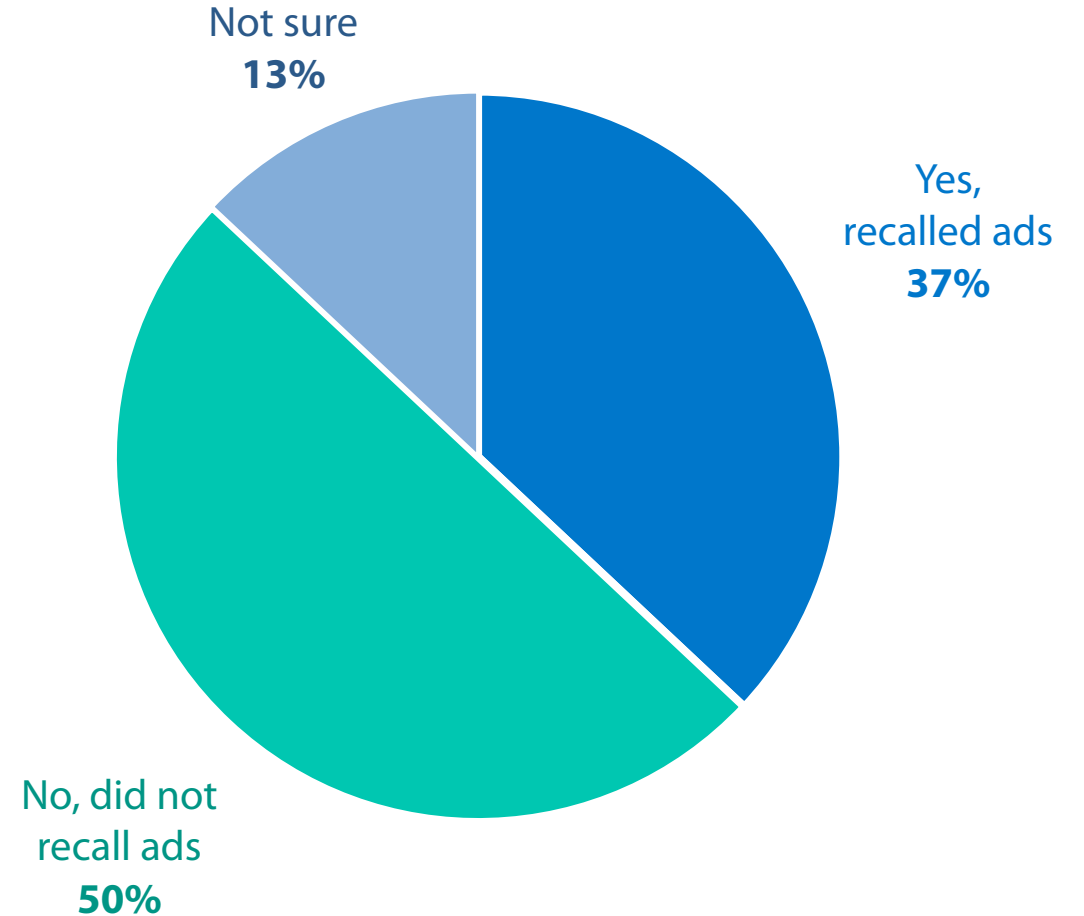
Special occasion
15%
(13% in 2025)



Special events
15%
(14% in 2025)

¹ Up to three responses permitted

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



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

JANUARY TO MARCH 2026

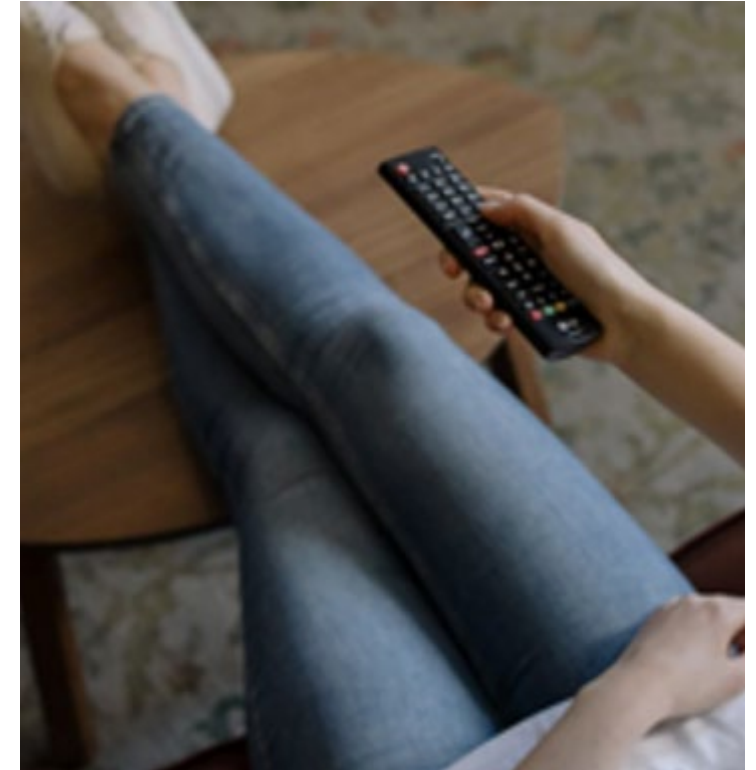
Base: **37%** of visitors who recalled advertising



VisitPensacola.com
34%
(33% in 2025)



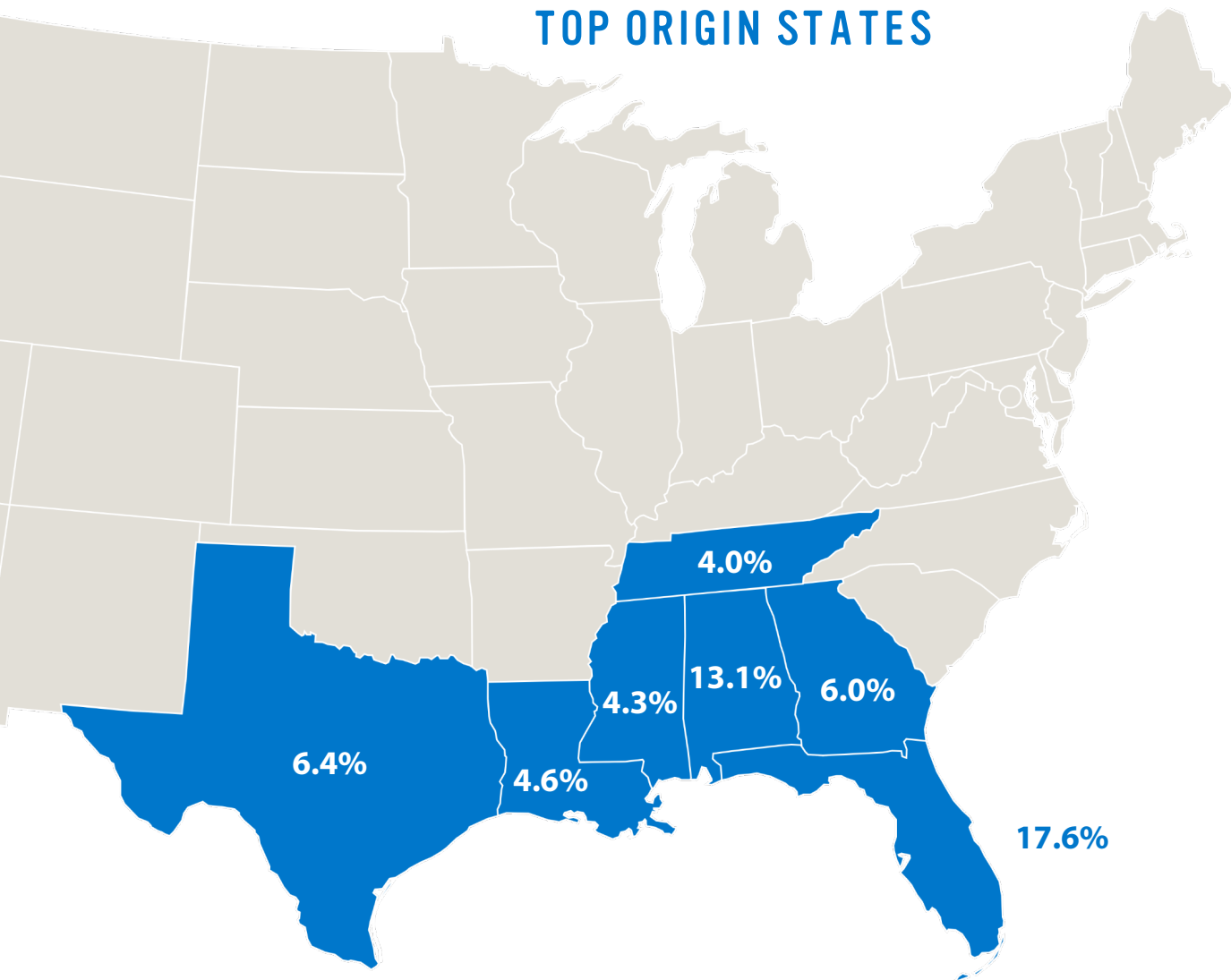
Personal social media
32%
(32% in 2025)



Television
23%
(21% in 2025)

¹ Multiple responses permitted.

DS downs & st. germain
RESEARCH



TOP MARKETS	2025	2026
Mobile ²	14.1%	16.4%
Atlanta	4.3%	4.5%
Birmingham	2.9%	2.6%
Nashville	2.4%	2.5%
New Orleans	2.9%	2.4%
Dallas – Fort Worth	2.3%	2.4%

1.5% of visitors traveled to the Pensacola area from **outside of the U.S.** The majority of international visitors came from Ontario (0.6%), the United Kingdom (0.2%), British Columbia (0.2%), and Quebec (0.1%).

TOP ACTIVITIES DURING VISIT¹

JANUARY TO MARCH 2026



Restaurants
89%
(88% in 2025)



Relax and unwind
71%
(74% in 2025)



Beach
64%
(66% in 2025)



Shopping
58%
(50% in 2025)



Art galleries/museums
36%
(38% in 2025)



Bars/nightclubs
35%
(31% in 2025)



Visit friends/relatives
33%
(34% in 2025)



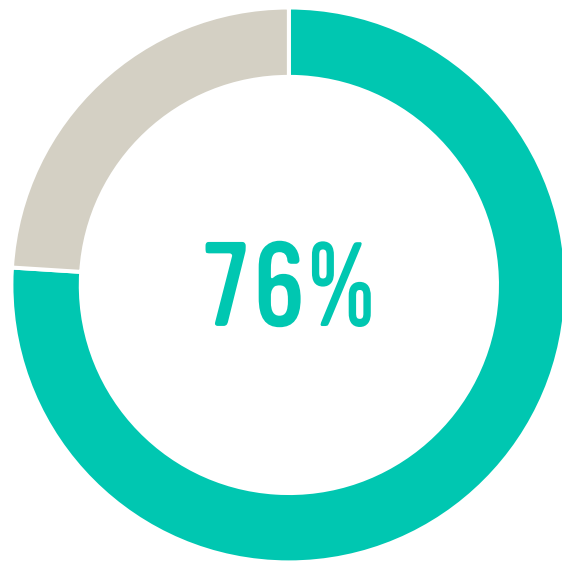
Attractions
33%
(37% in 2025)



Special events
30%
(26% in 2025)

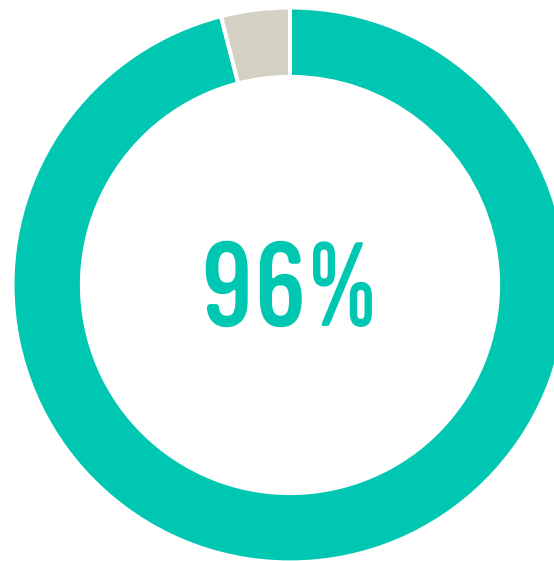


Family time
29%
(35% in 2025)



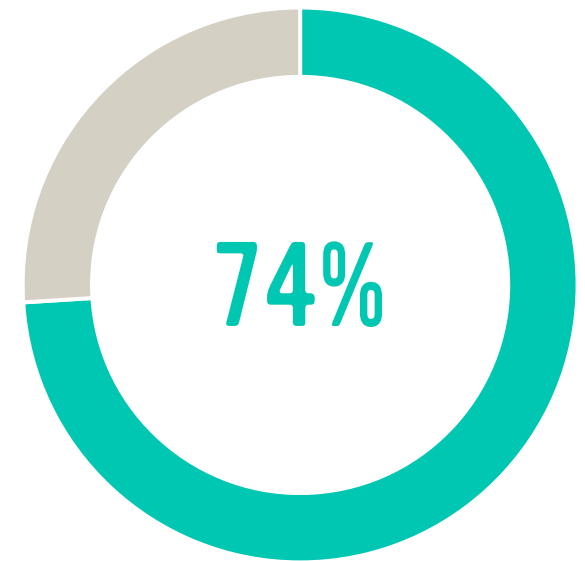
VERY SATISFIED

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



LIKELIHOOD TO RECOMMEND

Almost all visitors would recommend the Pensacola area to others.



DEFINITELY WILL RETURN

Nearly 3 in 4 visitors will definitely return to the Pensacola area.



AREA DESCRIPTORS

- » **Iconic beaches** – “We enjoy Perdido more than the Alabama beaches because it’s calmer and not so commercial.” / “The beaches have the whitest sand and clearest water”
- » **Friendly and welcoming vibe** – “A friendly and welcoming community” / “Great city, friendly people, beautiful beaches, and good times.” / It’s very friendly, welcoming, accepting community.”
- » **Relaxing, laid-back, peaceful** – “Came for a meeting, stayed for the fun and relaxation.” / “The best place to go when you need a break from the world” / “We come as much as we can. It’s so laid-back and relaxing.”
- » **Family-friendly** – “It’s a great place to bring the family” / “The perfect location for the baby’s first beach trip” / “We’ve stayed at a few different locations over the years and have found that we like Perdido the best because it feels smaller and safe for the kids.”
- » **Charming Downtown** – “Downtown is so quaint” / “The beach is gorgeous, but we really like the downtown area. Very historic and quaint.” / “Pensacola has a safe and well-maintained downtown that has plenty to do within walking distance.”

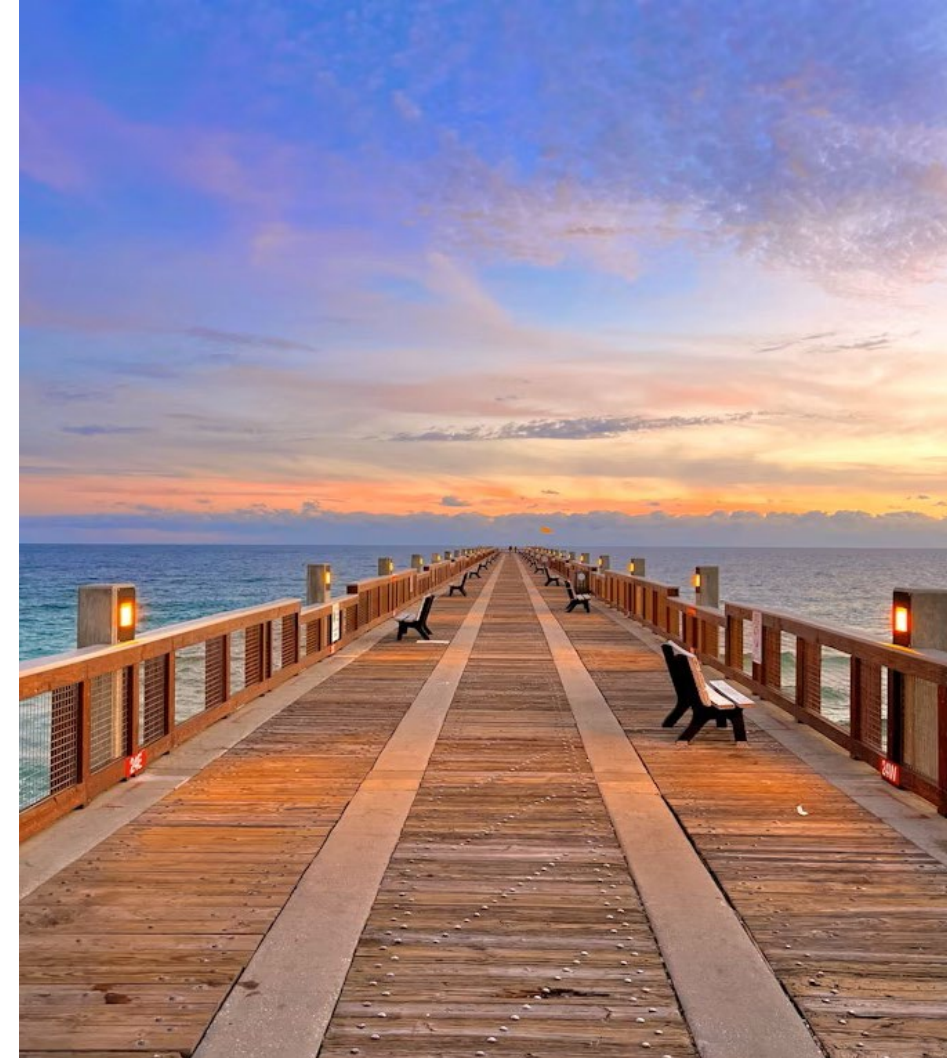
AREAS FOR IMPROVEMENT

- » **Parking** – “Nice Downtown, except parking is terrible.” / “Heading to Pensacola Beach area can sometimes be impossibly busy and parking is hard to find.”

QUARTERLY SNAPSHOT: JANUARY – MARCH 2026

COMPARED TO JANUARY – MARCH 2025, IN JANUARY – MARCH 2026...

- ☀️ **Occupancy** was up **+5.3%** and **ADR** was up **+1.4%**, resulting in a **RevPAR** that was up **+6.8%**.
- ☀️ Visitor **spending** was up **+13.5%** with a **higher yield per visitor** (+2.7%).
- ☀️ An **increase in visitation** (+10.5%) and **decrease in length of stay** (4.3 vs 4.7 in 2025) contributed to an **increase in room nights** (+8.8%) and **TDT** (+7.4%).
- ☀️ Visitors have a consistent **trip planning window** of about **60 days** in advance (+2 days longer than 2025). **Overnight visitors** have **longer trip planning** periods of about **69 days** in advance (+3 days longer than 2025).
- ☀️ More visitors utilized **VisitPensacola.com** (+5% points) to plan their trip.
- ☀️ More visitors utilized the **Pensacola Visitor Guide**, particularly online (+5% points).
- ☀️ Advertising influenced **19% of all visitors** to come to the Pensacola area (+2% points).
- ☀️ Of the 37% of visitors who recalled advertising, they were more likely to see it on **Visit Pensacola's social media** (+5% points) and an **online article** (+4% points).
- ☀️ There was an **increase in repeat visitors** as **25%** of visitors have visited the Pensacola area **more than 20 times** (+8% points). However, there was a **decrease in first time visitation** (-4.0% points).



VISITOR PROFILE DETAILED FINDINGS



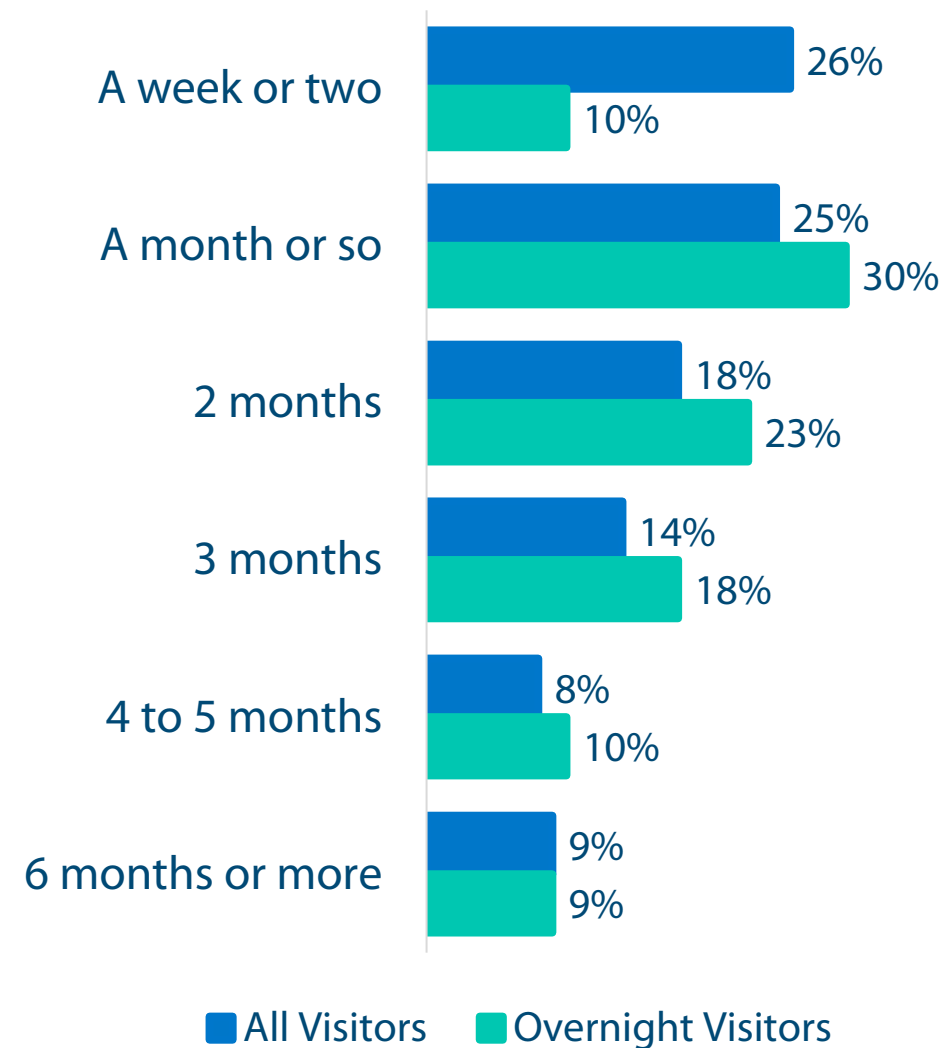
STUDY OBJECTIVES: VISITOR JOURNEY



VISITOR JOURNEY: PRE-VISIT



- » On average, visitors¹ planned their trip to the Pensacola area **60 days (about two months) in advance** (58 days in 2025)
- » Visitors staying overnight² had a slightly longer trip planning period of **69 days (over two months) in advance** (66 days in 2025)



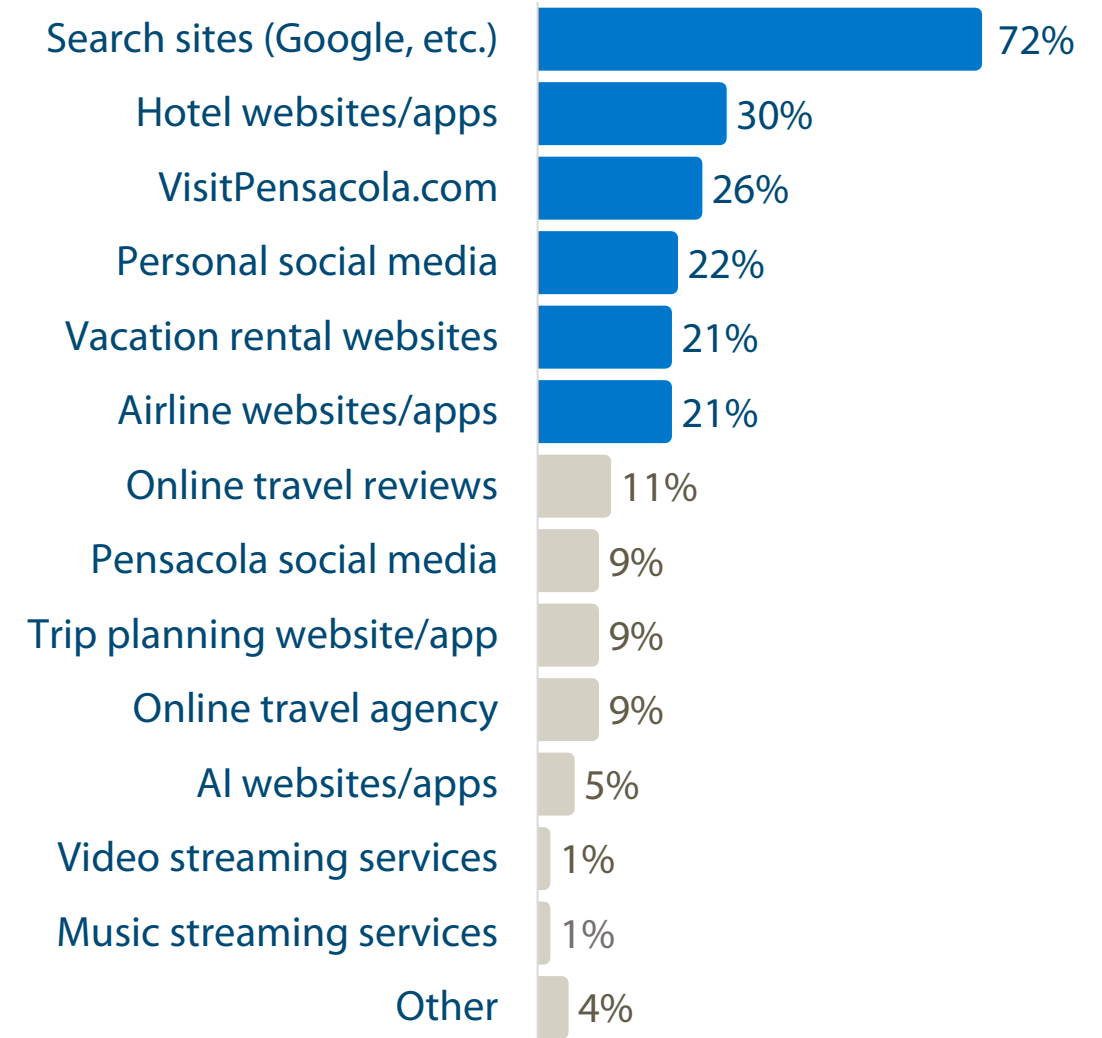
¹Includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.

²Includes visitors staying in paid accommodations and nonpaid accommodations.

ONLINE TRIP PLANNING SOURCES¹

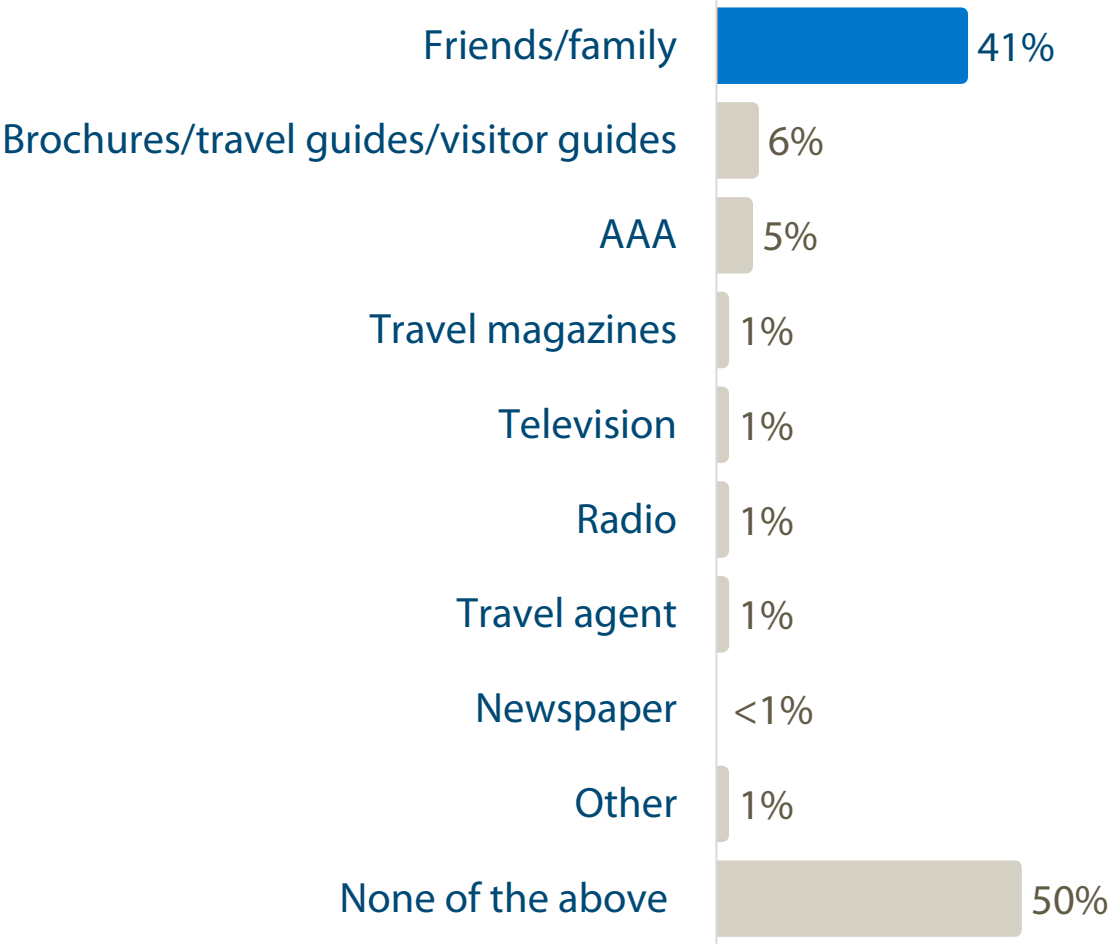
JANUARY TO MARCH 2026

- » **Search sites**, such as Google, continue to be the **number one planning source** for trips to the Pensacola area
- » **3 in 10** visitors used **hotel websites/apps** to plan their trip
- » **Over 1 in 4** visitors used **VisitPensacola.com** to plan their trip
- » **Over 1 in 5** visitors used their **personal social media**, **vacation rental websites**, or **airline websites/apps** to plan their trip



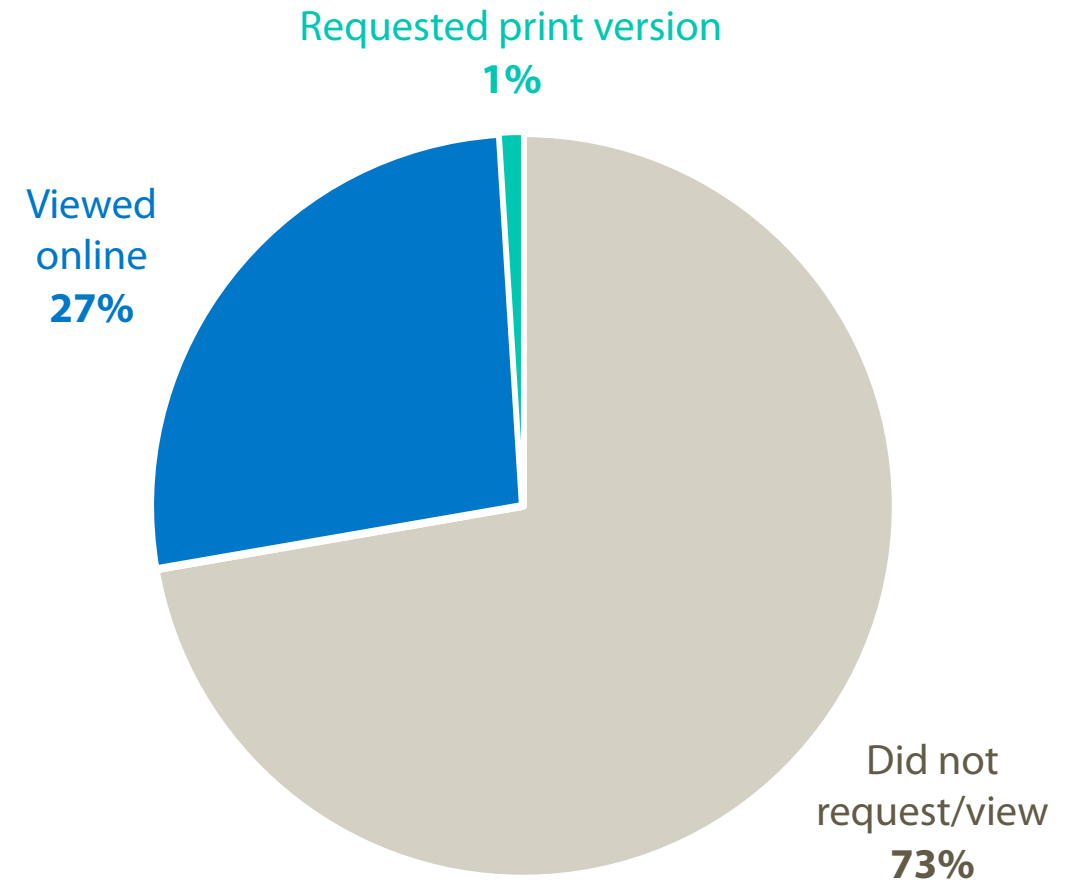
¹ Multiple responses permitted.

- » **Over 2 in 5** visitors planned their trip to the Pensacola area through **friends/family**
- » **Over 1 in 20** visitors used **brochures, travel guides, and/or visitor guides**



¹ Multiple responses permitted.

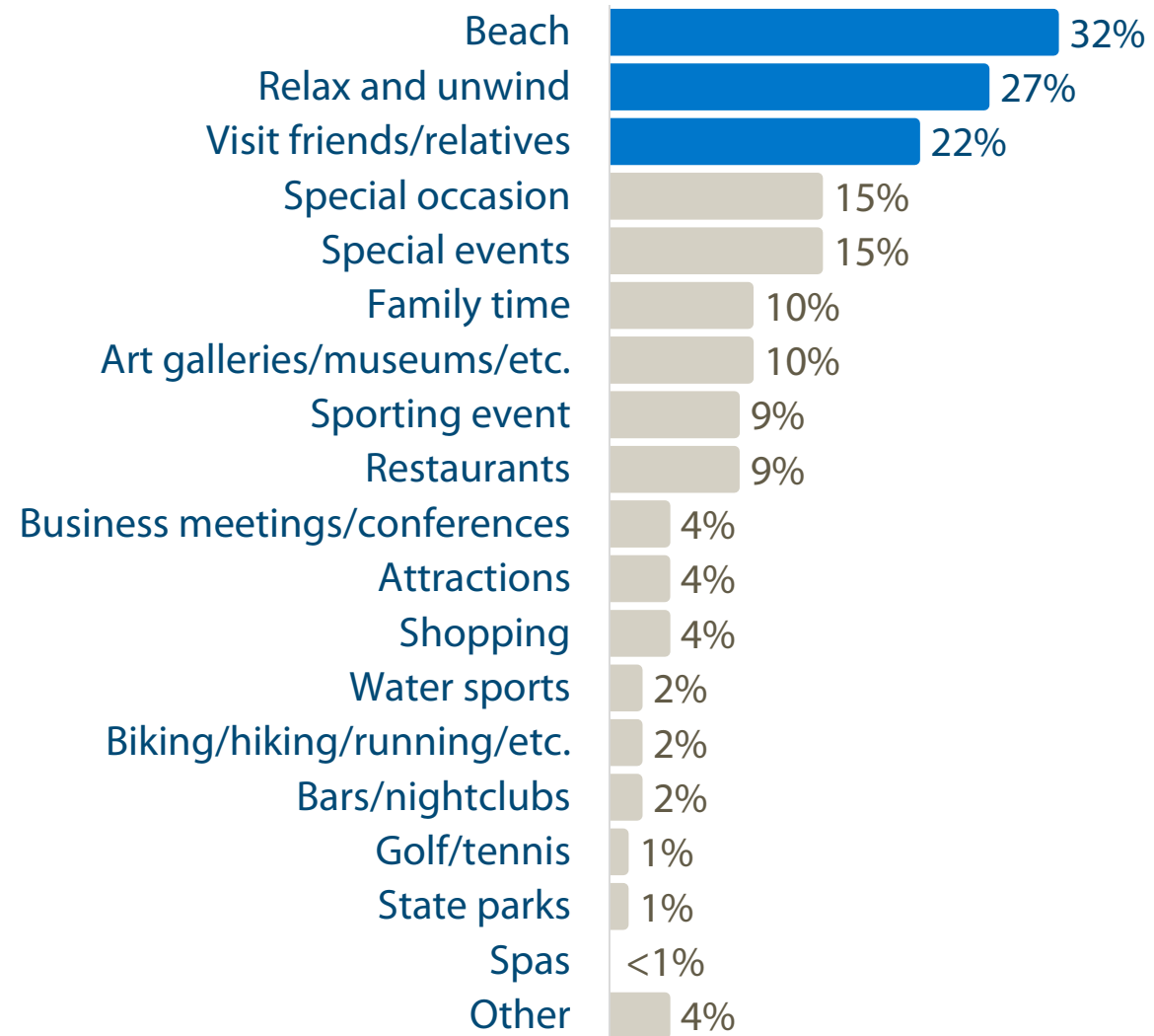
- » **Nearly 3 in 10** visitors **requested or viewed** the Pensacola Visitors Guide (23% in 2025)
- » **Online** viewership of the Pensacola Visitor Guide was **significantly greater than print consumption**



REASONS FOR VISITING¹

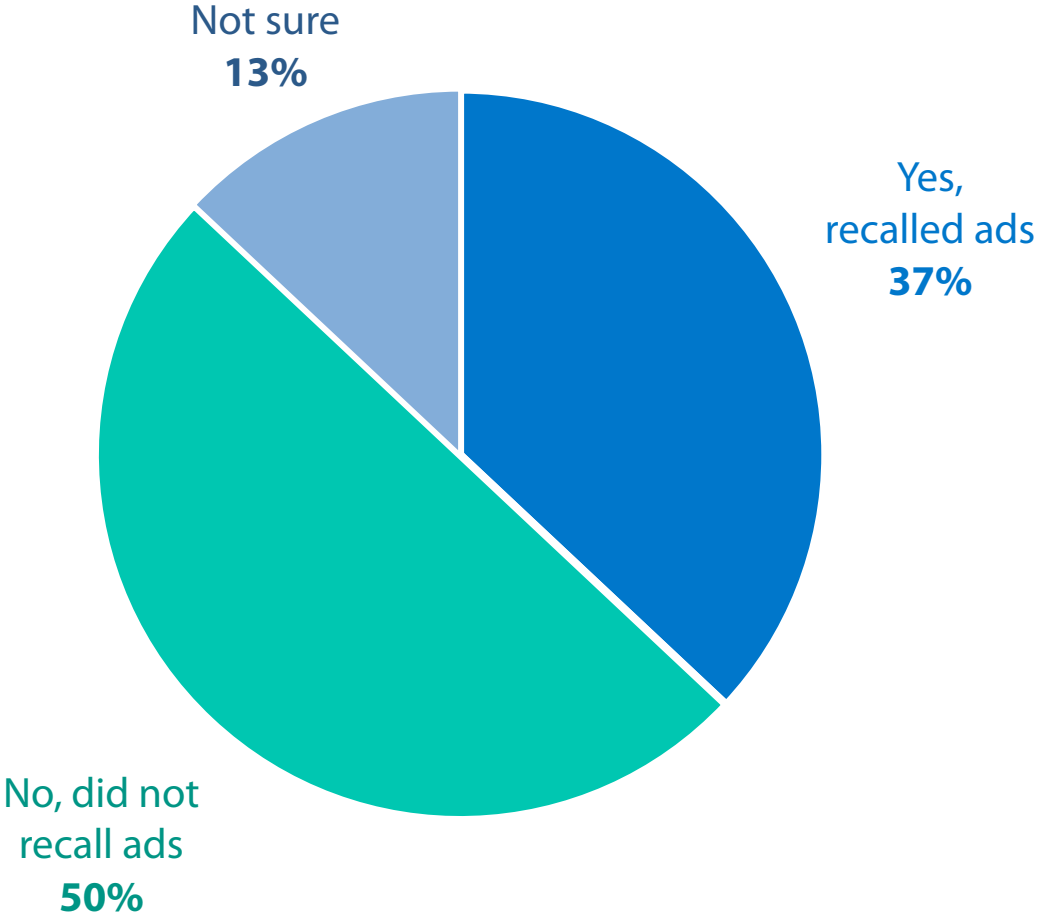
JANUARY TO MARCH 2026

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



¹ Up to three responses permitted

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



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.

Of the 37% of visitors who recalled advertising about the Pensacola area:

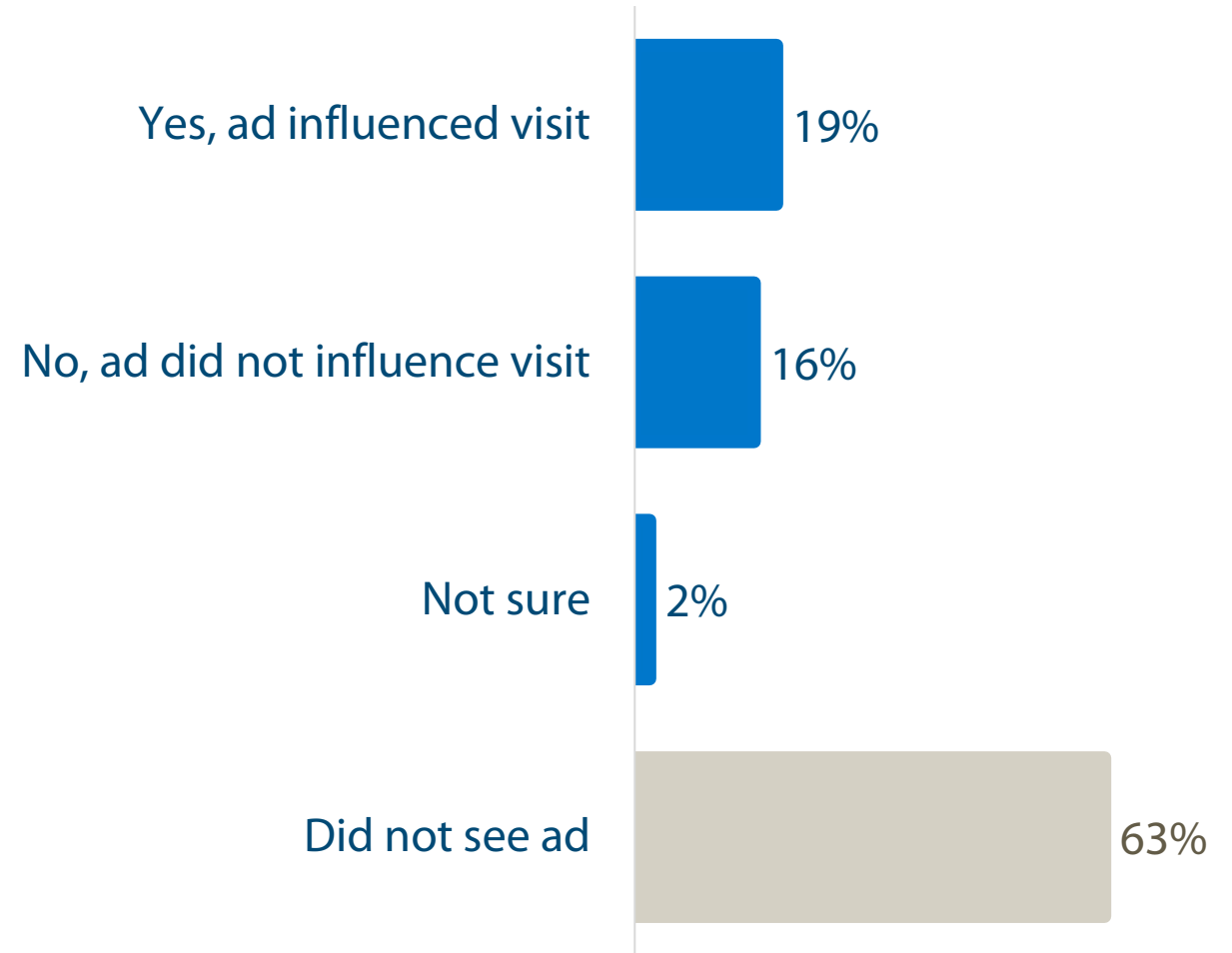
- » Over 1 in 3 visitors noticed advertising on VisitPensacola.com
- » Nearly 1 in 3 visitors noticed advertising on personal social media
- » Nearly 1 in 4 visitors noticed advertising on television

Base: 37% of visitors who recalled advertising



¹ Multiple responses permitted.

» **19%** of **all visitors** were influenced by an ad to visit the Pensacola area (17% in 2025)



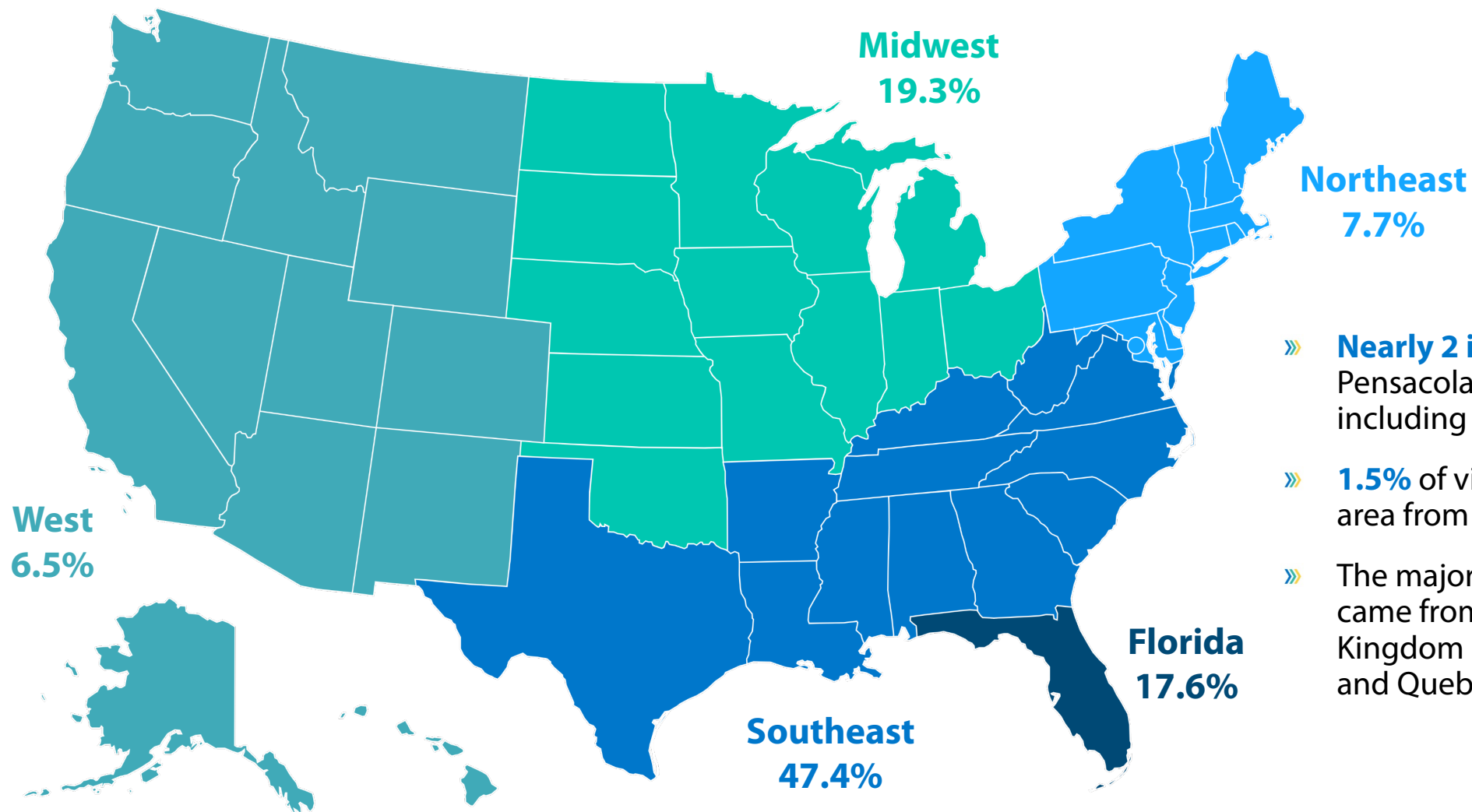
¹ Note: These figures are topline and solely relies on the memory of each visitor even though various other factors go into the influence of advertising.

VISITOR JOURNEY: TRAVEL PARTY PROFILE



REGION OF ORIGIN¹

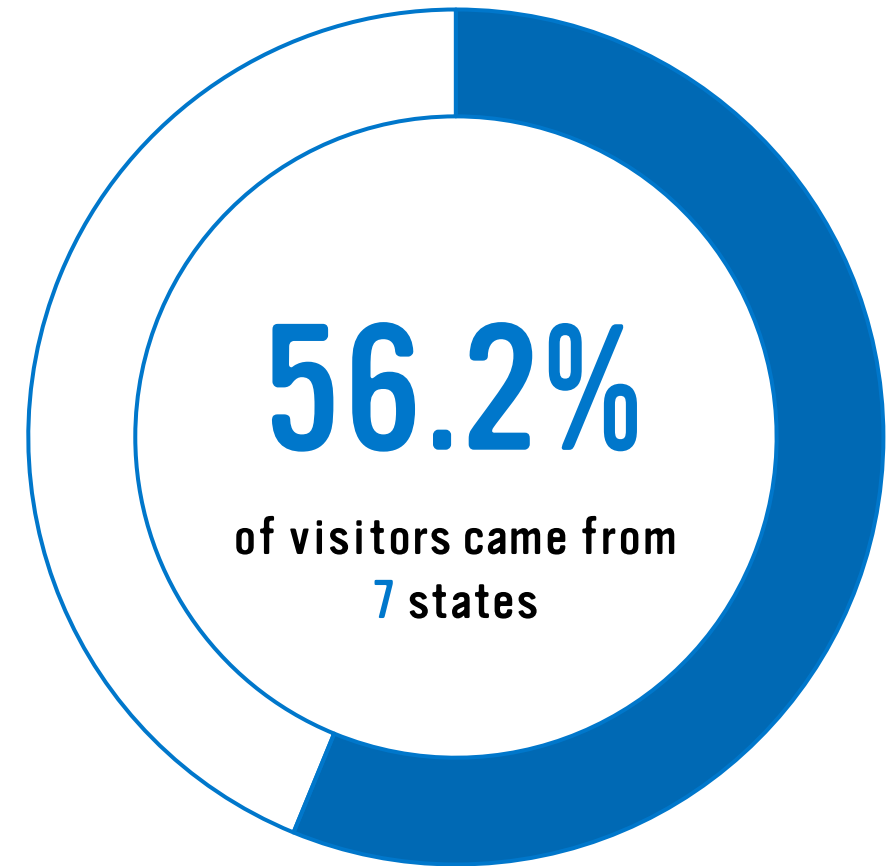
JANUARY TO MARCH 2026



- » **Nearly 2 in 3** visitors traveled to the Pensacola area from the **Southeast**, including **Florida**
- » **1.5%** of visitors traveled to the Pensacola area from **outside of the U.S.**
- » The majority of international visitors came from Ontario (0.6%), the United Kingdom (0.2%), British Columbia (0.2%), and Quebec (0.1%).

¹ Sources: Zartico and Visitor Tracking Study.

STATE	2025	2026
Florida	14.0%	17.6%
Alabama	13.2%	13.1%
Texas	6.7%	6.4%
Georgia	6.0%	6.0%
Louisiana	5.6%	4.6%
Mississippi	4.9%	4.3%
Tennessee	3.9%	4.0%



¹ Sources: Zartico and Visitor Tracking Study.

TOP MARKETS	2025	2026
Mobile ²	14.1%	16.4%
Atlanta	4.3%	4.5%
Birmingham	2.9%	2.6%
Nashville	2.4%	2.5%
New Orleans	2.9%	2.4%
Dallas – Fort Worth	2.3%	2.4%

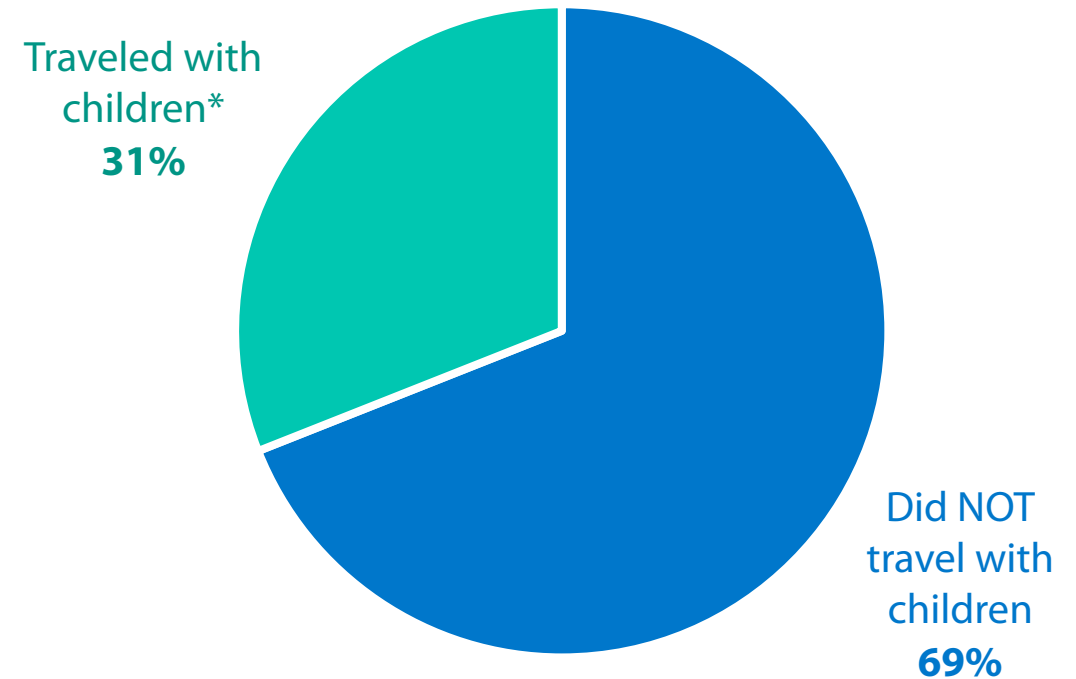
» **Mobile²** continues to be the top DMA for the Pensacola area

» **30.8%** of visitors traveled from **6** market areas

¹ Sources: Zartico and Visitor Tracking Study.

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

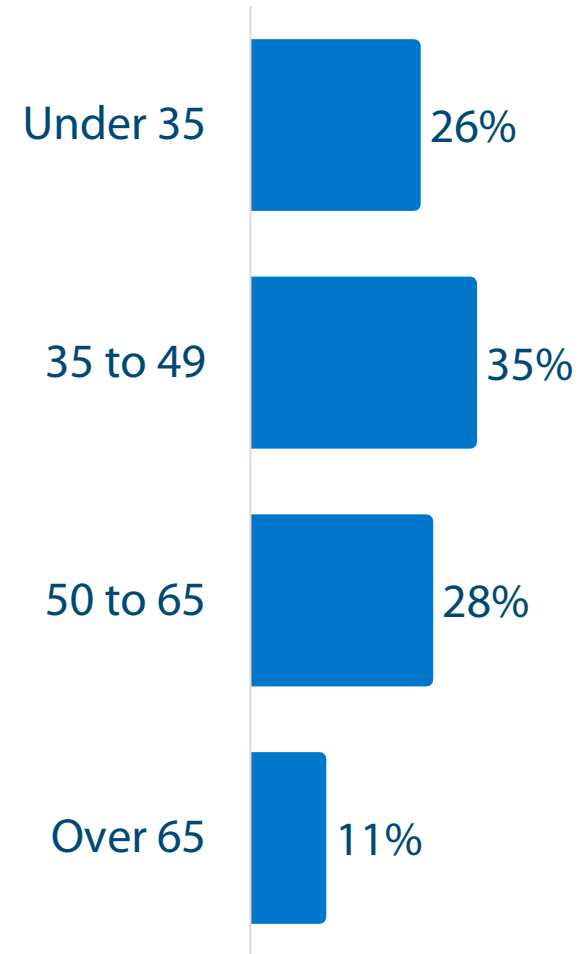
- » For **all visitors**¹, the typical **travel party size** was **2.6** (2.7 in 2025)
- » The typical **travel party size** for visitors staying in **paid accommodations** was **2.7** (2.8 in 2025)
- » **Majority** of travel parties did not include **children under the age of 20** (70% in 2025)



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

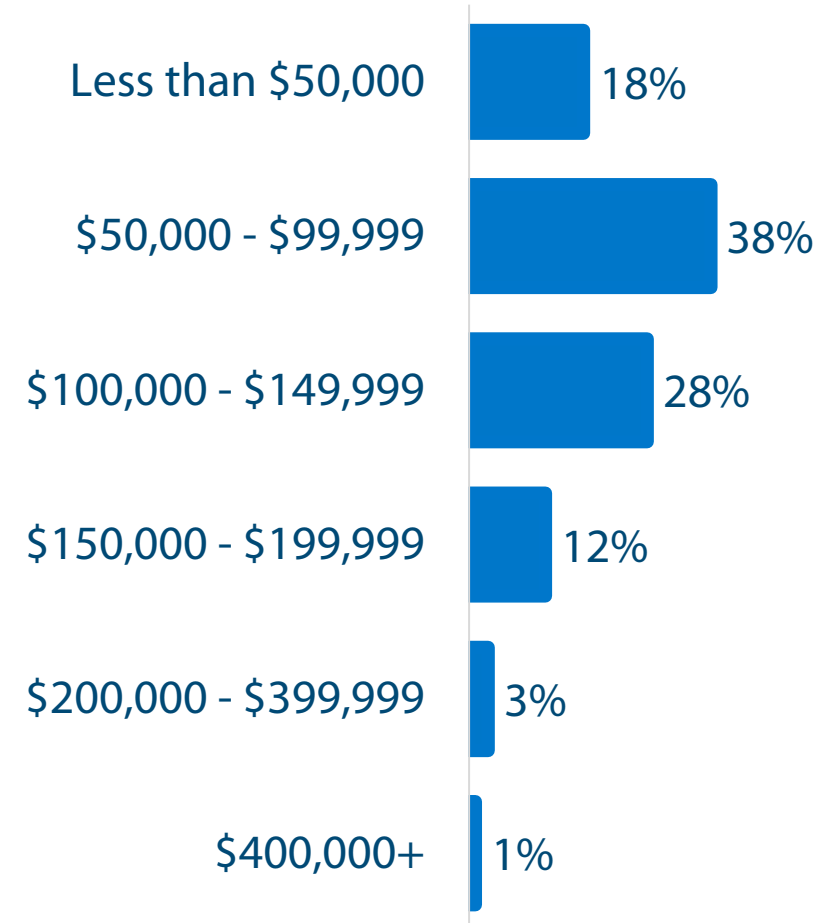
*Children are considered people under the age of 20

» The median **age**¹ of visitors to the Pensacola area was **45** (45 in 2025)

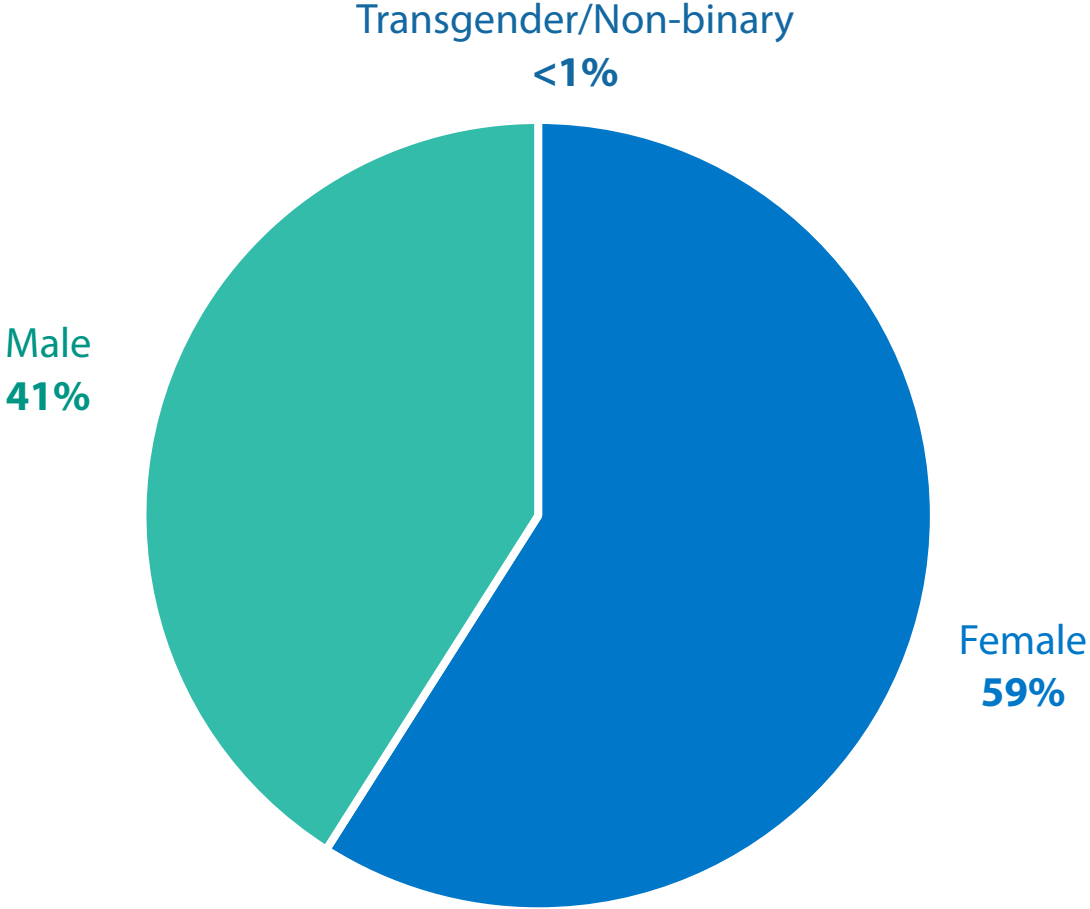


¹Age of member of travel party surveyed.
The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

- » Visitors to the Pensacola area had a **median household income** of **\$92,100** per year (\$83,700 in 2025)
- » **16%** of visitors had household incomes **over \$150,000**
- » **56%** of visitors had household incomes **below \$100,000**

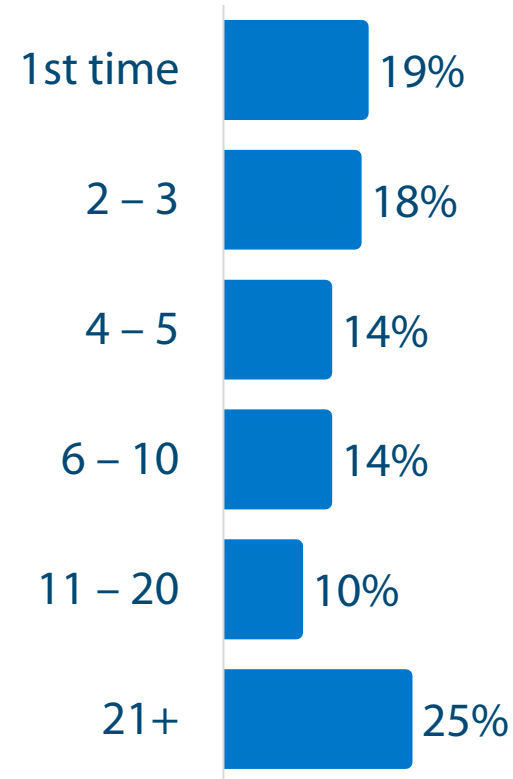


» 59% of visitors interviewed were female¹
(60% in 2025)



¹Gender 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.

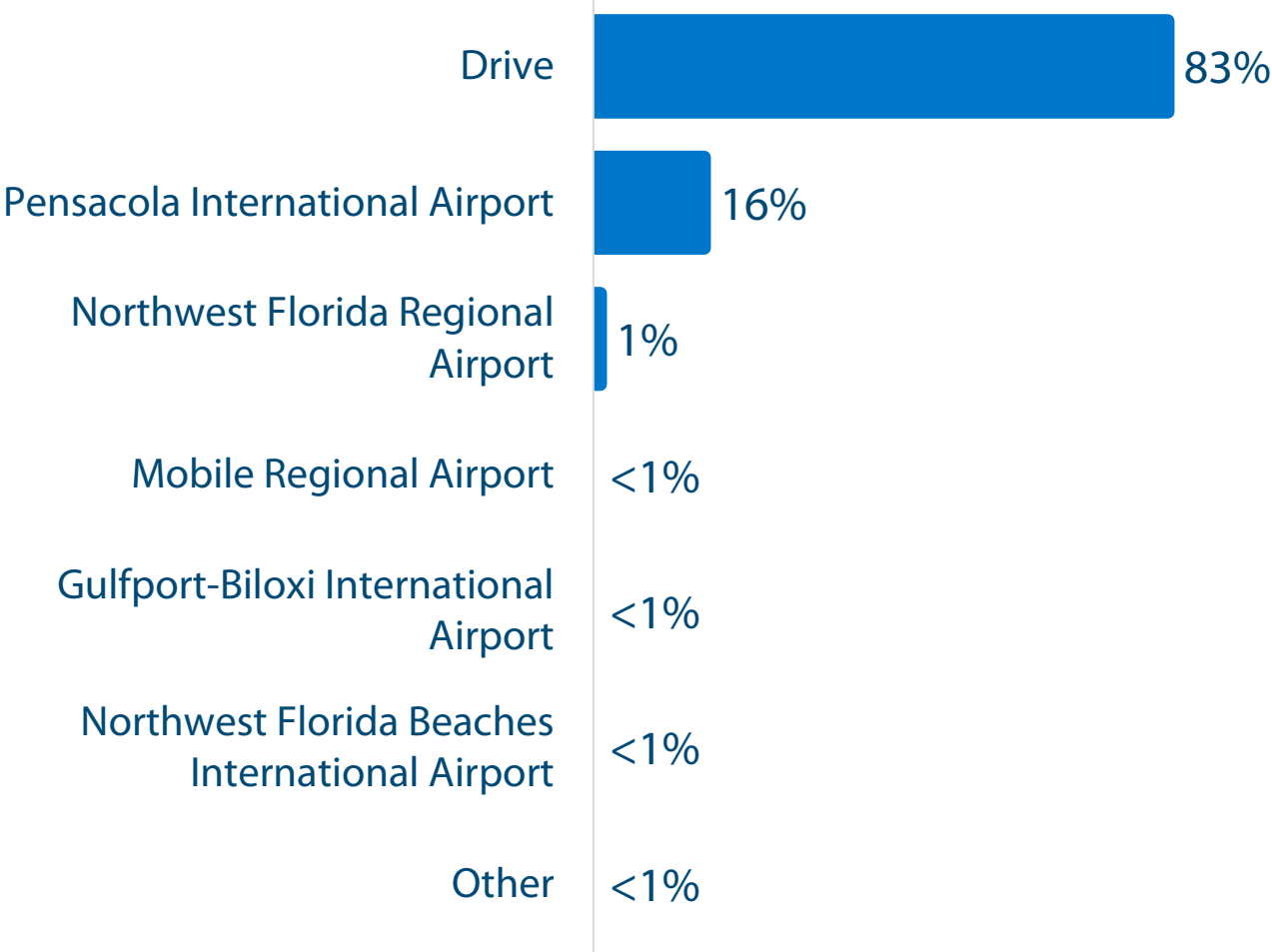
- » **Nearly 1 in 5** visitors were visiting the Pensacola area for the **first time** (23% in 2025)
- » **35%** of visitors are loyalists, having **visited the Pensacola area over 10 times** (26% in 2025)



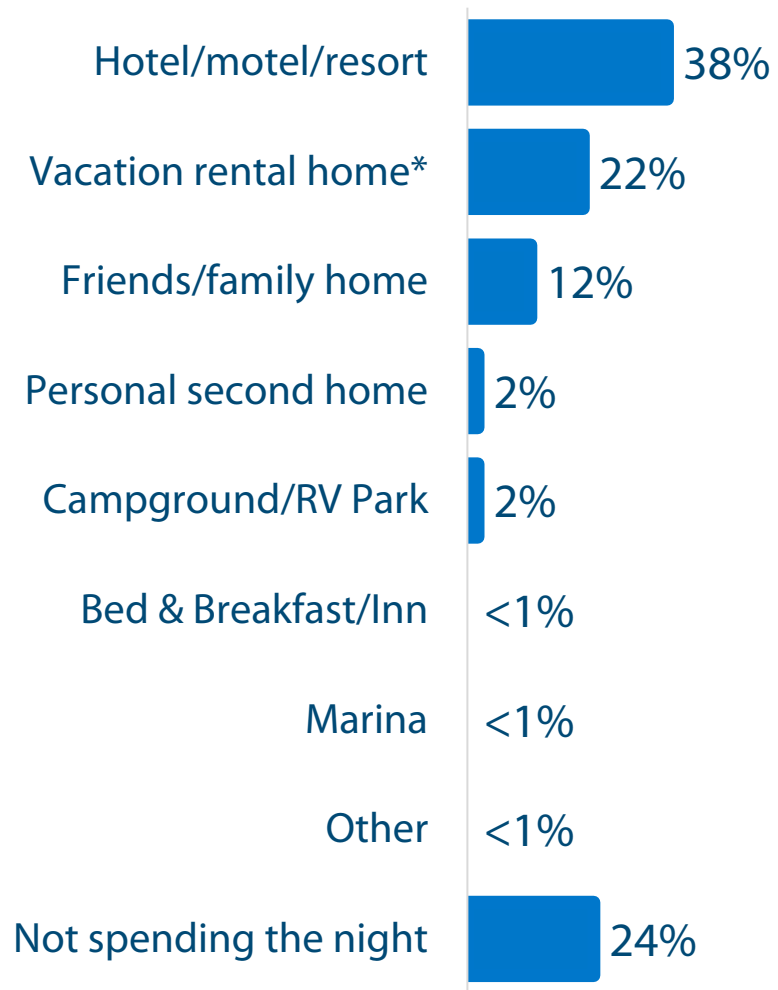
VISITOR JOURNEY: TRIP EXPERIENCE



- » **Over 4 in 5** visitors **drove** to the Pensacola area for their trip (84% in 2025)
- » **16%** of visitors used the **Pensacola International Airport** (15% in 2025)



- » **Nearly 2 in 5** visitors stayed overnight in a **hotel, motel, or resort** (36% in 2025)
- » The typical visitor¹ stayed **4.3 nights** in Pensacola area (4.7 in 2025)
- » Visitors staying in **paid accommodations**² stayed an average of **5.1 nights** in the Pensacola area (5.6 in 2025)

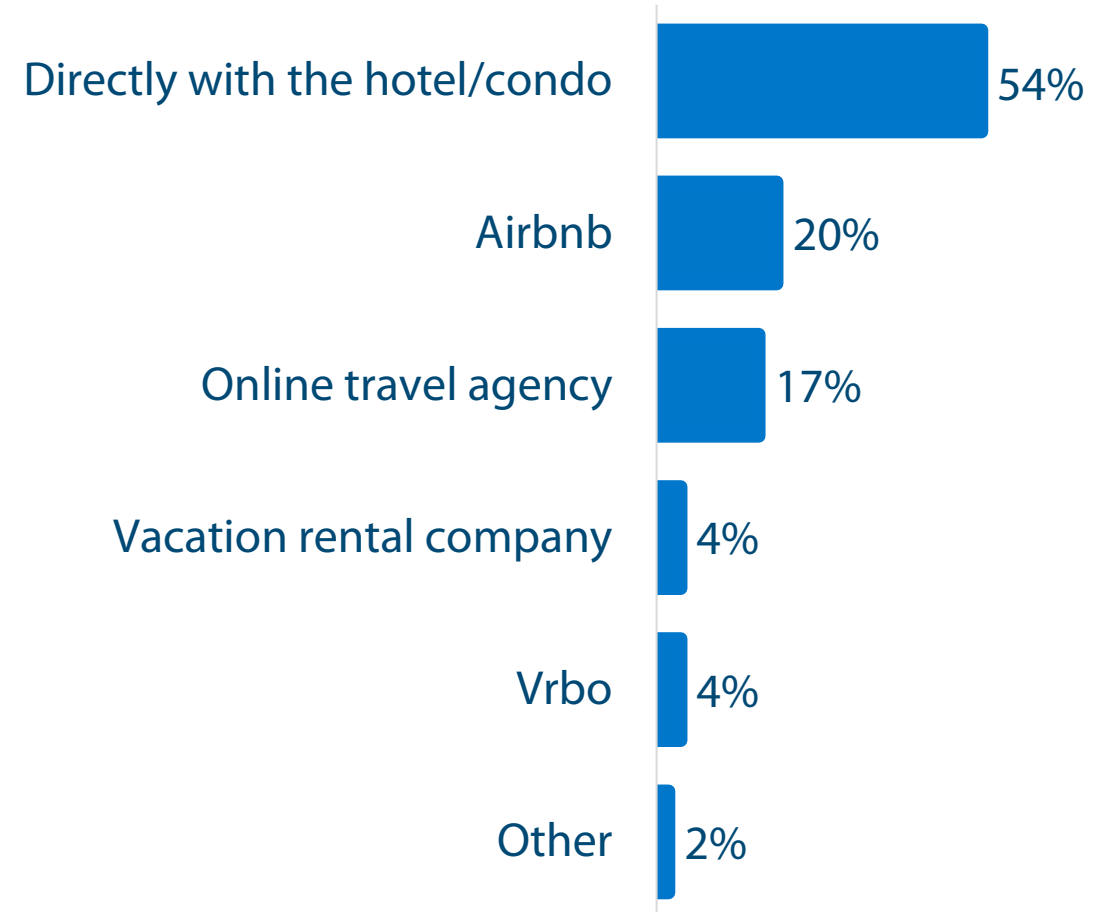


¹ Visitors staying in paid accommodations, nonpaid accommodations, and day trippers.

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

*Includes Airbnb, Vrbo, etc.

- » **Over half** of visitors booked their trip to the Pensacola area **directly with the hotel/condo** (50% in 2025)
- » **1 in 5** visitors booked through **Airbnb** (23% in 2025)
- » **1 in 6** visitors booked through an **online travel agency** (17% in 2025)



Top activities enjoyed by visitors this quarter include:

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

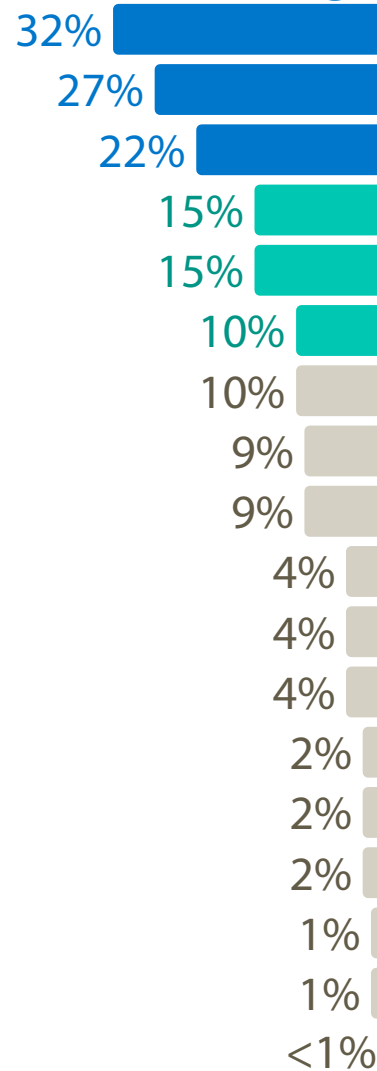


¹ Multiple responses permitted.

ACTIVITIES V. REASON FOR VISIT

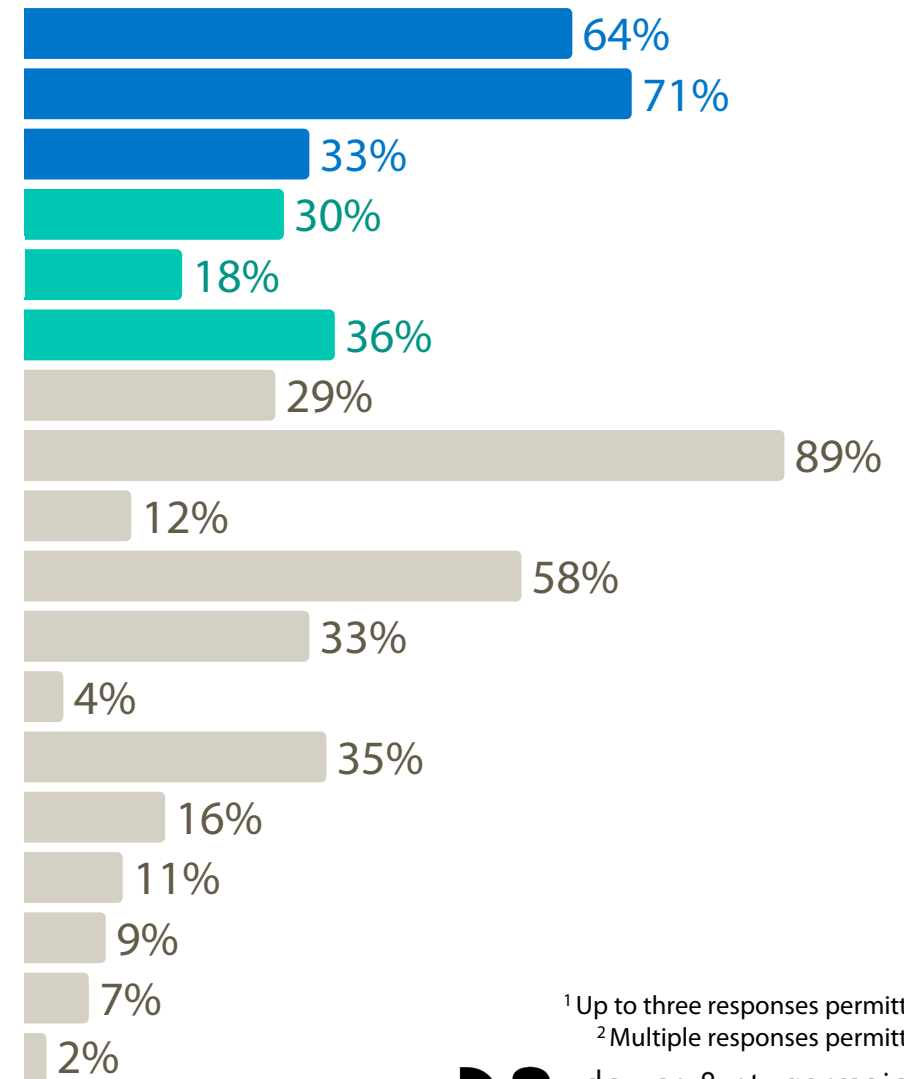
JANUARY TO MARCH 2026

Reason for Visiting¹



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

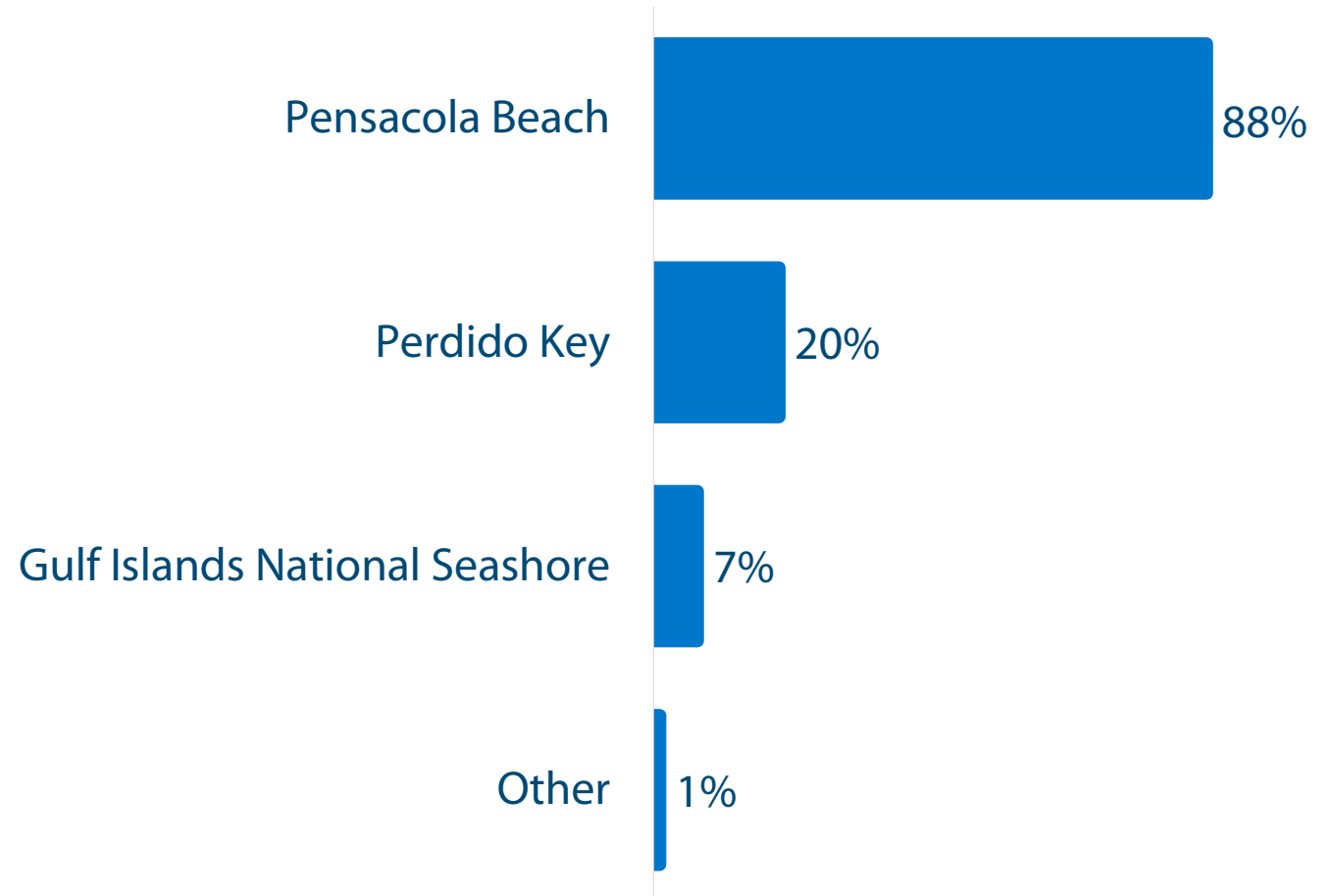
Visitor Activities²



¹ Up to three responses permitted.

² Multiple responses permitted.

- » **Nearly 9 in 10** visitors who visited the beach went to **Pensacola Beach**
- » **1 in 5** visitors who visited the beach went to **Perdido Key**

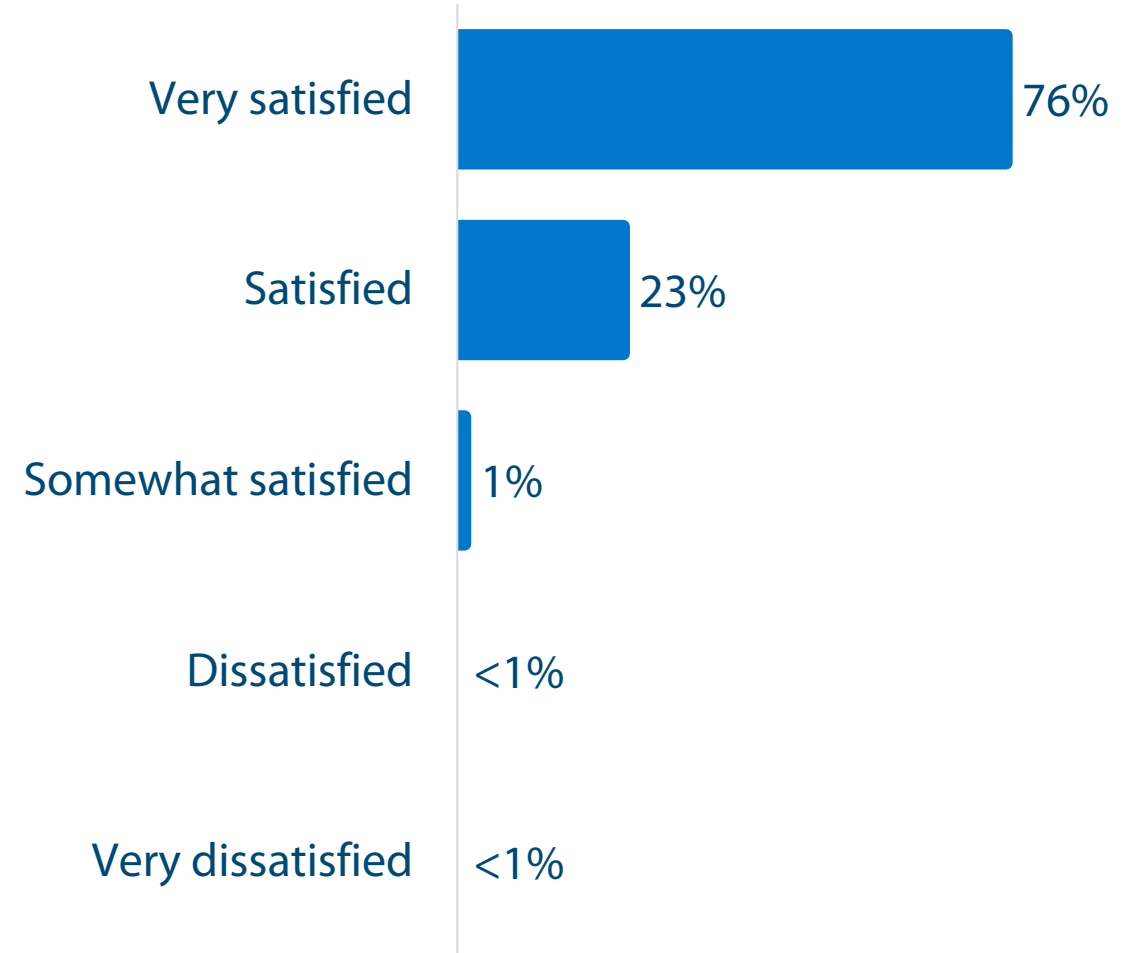


¹ Multiple responses permitted.

VISITOR JOURNEY: POST TRIP EVALUATION

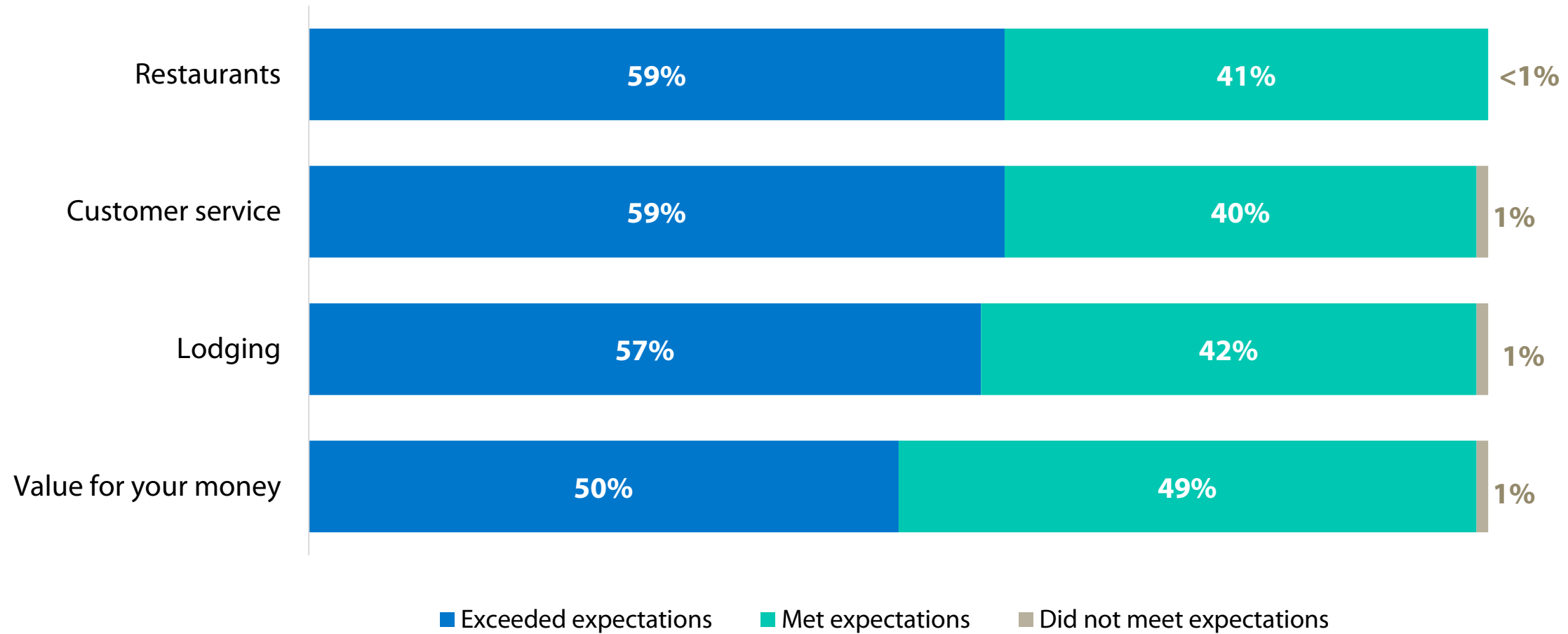


- » **Over 3 in 4** visitors were **very satisfied** with their trip to the Pensacola area (**76% in 2025**)
- » Those who said somewhat satisfied, dissatisfied, or very dissatisfied were asked what features they liked least about the area, which included: high prices, traffic, quality accommodations, and customer service

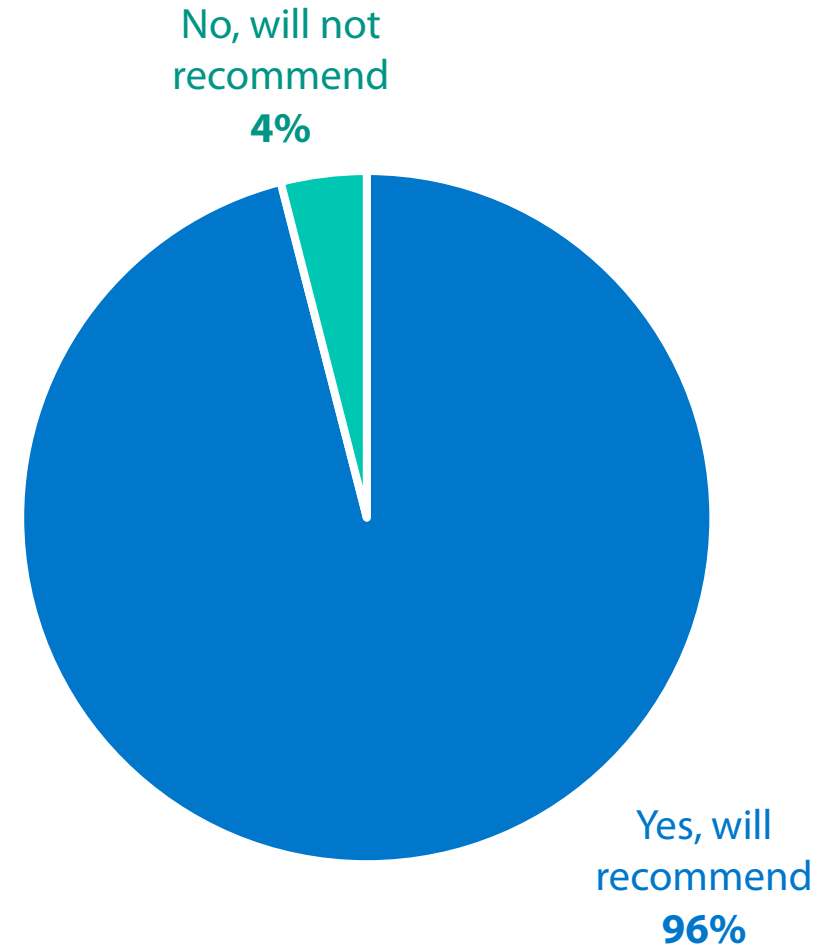


SATISFACTION RATINGS

JANUARY TO MARCH 2026



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



» **Nearly 3 in 4** visitors will **definitely return** to the Pensacola area (72% in 2025)



VISIT PENSACOLA

VISITOR TRACKING STUDY

JANUARY-MARCH 2026

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