

# VISIT PENSACOLA

VISITOR TRACKING STUDY  
JULY – SEPTEMBER 2025



# METHODOLOGY



Interviews were completed in-person and online with **977** visitors between **July 1 and September 30, 2025**.

In-person surveying locations included:

- » Downtown Pensacola
- » The Historic Village
- » Pensacola Beach
- » Perdido Key
- » Pensacola International Airport
- » Pensacola Lighthouse
- » National Aviation Museum
- » Veterans Memorial Park
- » Blue Angels Airshow at Pensacola Beach
- » Flora-Bama Bulls on the Beach
- » Pensacola Seafood Festival



# ECONOMIC IMPACT SUMMARY



# KEY PERFORMANCE INDICATORS

JULY TO SEPTEMBER 2025

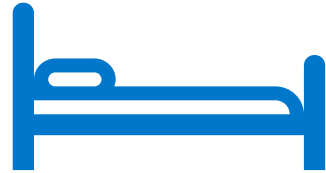


745,700

TOTAL  
VISITORS<sup>1</sup>

vs. 2024

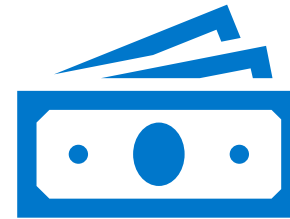
↓ 3.8%



696,100

ROOM  
NIGHTS

↓ 0.4%



\$445,970,200

DIRECT  
SPENDING

↑ 4.3%



\$9,116,016

TOURISM  
DEVELOPMENT TAX<sup>2</sup>

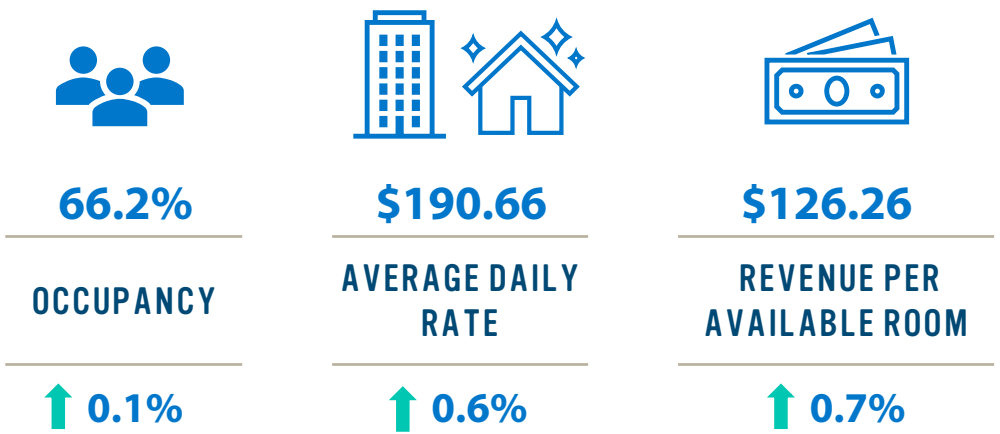
↓ 1.6%

# LODGING METRICS

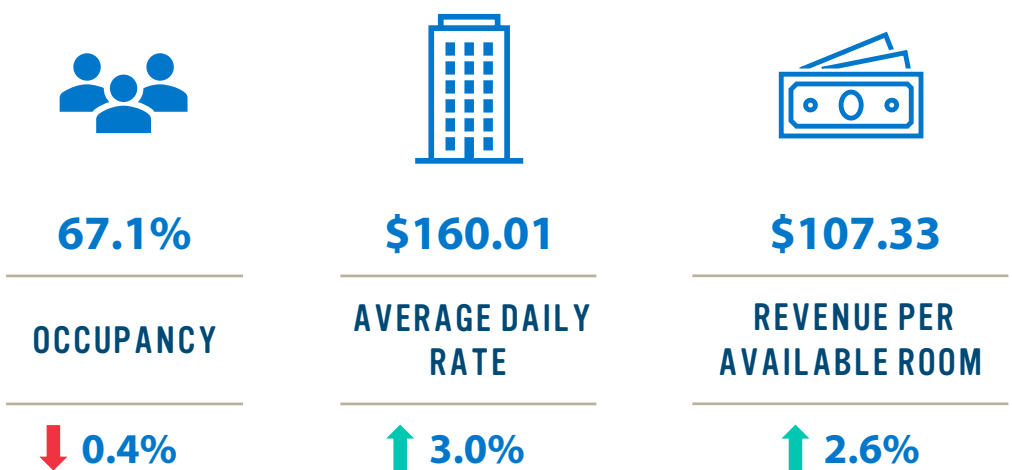
JULY TO SEPTEMBER 2025

<sup>1</sup> Source: Smith  
Travel Research.  
<sup>2</sup> Source: Key Data.

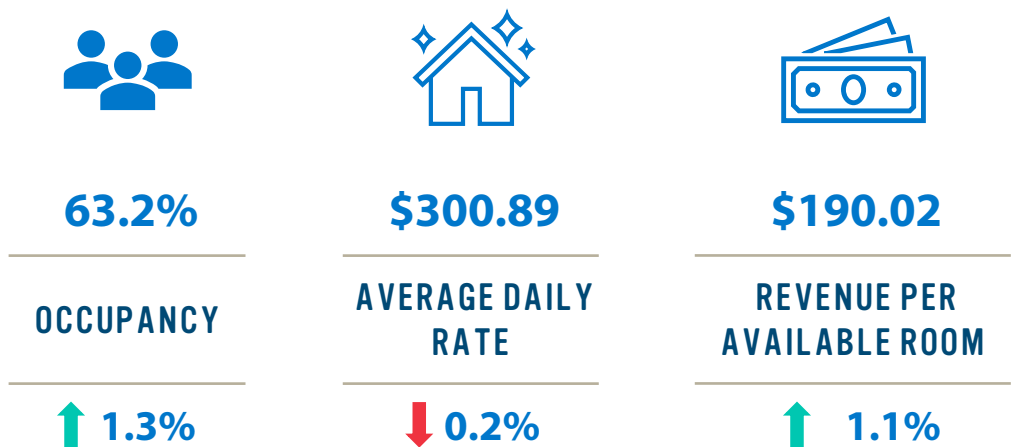
## COMBINED



## HOTELS<sup>1</sup>



## VACATION RENTALS<sup>2</sup>



**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.

# DAILY TRAVEL PARTY SPENDING

JULY TO SEPTEMBER 2025

	ALL VISITORS 2024	ALL VISITORS 2025
Accommodations <sup>1</sup>	\$145	\$152
Restaurants	\$102	\$115
Groceries	\$16	\$17
Shopping	\$31	\$35
Entertainment	\$42	\$43
Transportation	\$26	\$26
Other	\$1	\$1
<b>Daily Spending</b>	<b>\$363</b>	<b>\$389</b>

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

# TOTAL TRAVEL PARTY SPENDING

JULY TO SEPTEMBER 2025

	ALL VISITORS 2024	ALL VISITORS 2025
Accommodations <sup>1</sup>	\$595	\$608
Restaurants	\$418	\$460
Groceries	\$66	\$68
Shopping	\$127	\$140
Entertainment	\$172	\$172
Transportation	\$107	\$104
Other	\$4	\$4
<b>Total Spending</b>	<b>\$1,489</b>	<b>\$1,556</b>

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

	JULY – SEPTEMBER 2024	JULY – SEPTEMBER 2025	% Δ
Visitors <sup>1</sup>	775,200	745,700	-3.8%
Direct Spending	\$427,517,700	\$445,970,200	+4.3%
Room Nights	698,800	696,100	-0.4%
TDT <sup>2</sup>	\$9,268,217	\$9,116,016	-1.6%

<sup>1</sup> Smaller travel party sizes and fewer visitors staying with friends/relatives or in their second homes contributed to a decrease in overall visitation.

<sup>2</sup> Source: Clerk & Comptroller Escambia County.



# LODGING METRICS YOY

JULY TO SEPTEMBER 2025

COMBINED LODGING METRICS	JULY - SEPTEMBER 2024	JULY - SEPTEMBER 2025	% Δ
Occupancy	66.2%	66.2%	+0.1%
ADR	\$189.46	\$190.66	+0.6%
RevPAR	\$125.40	\$126.26	+0.7%

HOTEL METRICS <sup>1</sup>	JULY - SEPTEMBER 2024	JULY - SEPTEMBER 2025	% Δ
Occupancy	67.4%	67.1%	-0.4%
ADR	\$155.28	\$160.01	+3.0%
RevPAR	\$104.60	\$107.33	+2.6%

VACATION RENTAL METRICS <sup>2</sup>	JULY - SEPTEMBER 2024	JULY - SEPTEMBER 2025	% Δ
Occupancy	62.3%	63.2%	+1.3%
ADR	\$301.47	\$300.89	-0.2%
RevPAR	\$187.90	\$190.02	+1.1%

**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.

<sup>1</sup> Source: Smith Travel Research.

<sup>2</sup> Source: Key Data.

# VISITOR PROFILE SUMMARY





**26%**  
Viewed Visitor Guide

**21%**  
First-time Visitor

**2.9**  
Travel Party Size<sup>2</sup>

**82%**  
Drove

**48%**  
Traveled with children<sup>1</sup>

**4.0**  
Length of Stay<sup>2</sup>

<sup>1</sup>Children are defined as people under 20 years old.

<sup>2</sup>Includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.





**Paid accommodations<sup>1</sup>**  
**65%**  
(65% in 2024)

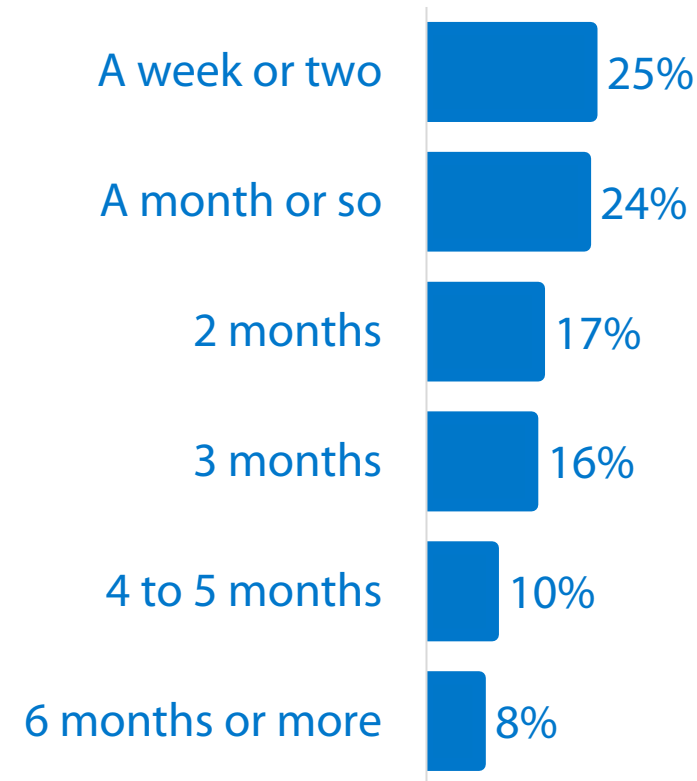


**Day trippers**  
**21%**  
(20% in 2024)



**Nonpaid accommodations<sup>2</sup>**  
**14%**  
(15% in 2024)

- » Visitors to the Pensacola area have short trip planning windows, as **nearly half** of visitors planned their trip to the Pensacola area **a month or less in advance** (54% in 2024)
- » On the other hand, **1 in 3** visitors planned their trip between **2 and 3 months in advance** (33% in 2024)
- » Average trip planning cycle began **62 days** before the trip (55 days in 2024)





# TOP TRIP PLANNING SOURCES<sup>1</sup>

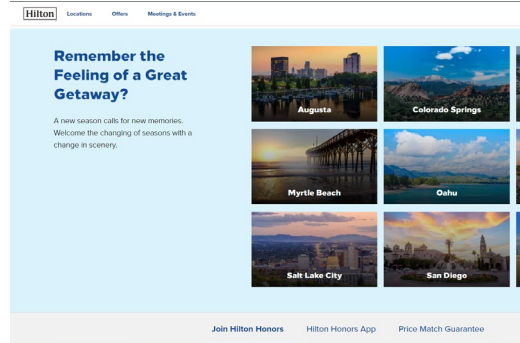
JULY TO SEPTEMBER 2025



**Search sites**  
**73%**  
(72% in 2024)



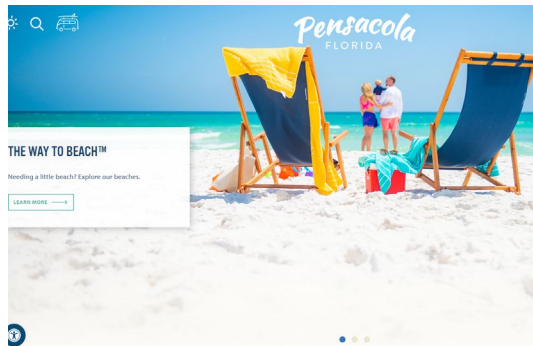
**Friends/family**  
**43%**  
(38% in 2024)



**Hotel websites/apps**  
**29%**  
(29% in 2024)



**Vacation rental websites**  
**26%**  
(26% in 2024)



**VisitPensacola.com**  
**22%**  
(21% in 2024)



**Airline websites/apps**  
**22%**  
(20% in 2024)



**Personal social media**  
**19%**  
(24% in 2024)

<sup>1</sup> Multiple responses permitted.

# TOP REASONS FOR VISITING<sup>1</sup>

JULY TO SEPTEMBER 2025



**Beach**  
**50%**  
(52% in 2024)



**Relax and unwind**  
**38%**  
(40% in 2024)



**Visit friends/relatives**  
**26%**  
(24% in 2024)



**Special occasion**  
**16%**  
(13% in 2024)



**Special events**  
**13%**  
(9% in 2024)

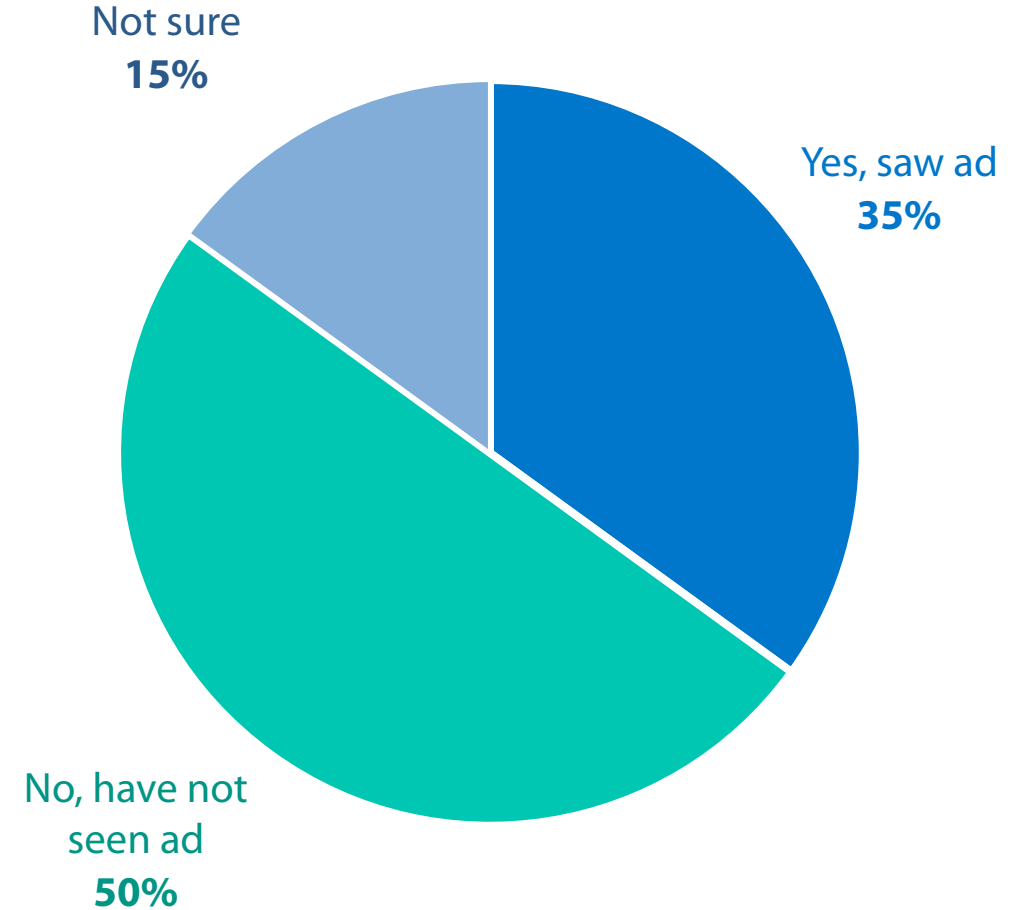


**Family time**  
**12%**  
(17% in 2024)

<sup>1</sup> Up to three responses permitted



» **Over 1 in 3** visitors **recalled advertising** about the Pensacola area (27% in 2024)



# TOP SOURCES OF AD RECALL

JULY TO SEPTEMBER 2025

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



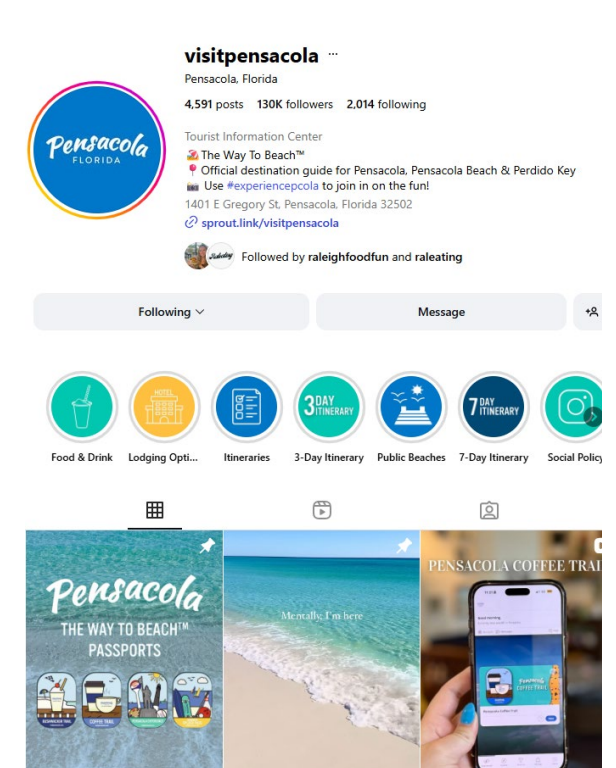
**VisitPensacola.com**  
**36%**  
(25% in 2024)



**Personal social media**  
**30%**  
(34% in 2024)



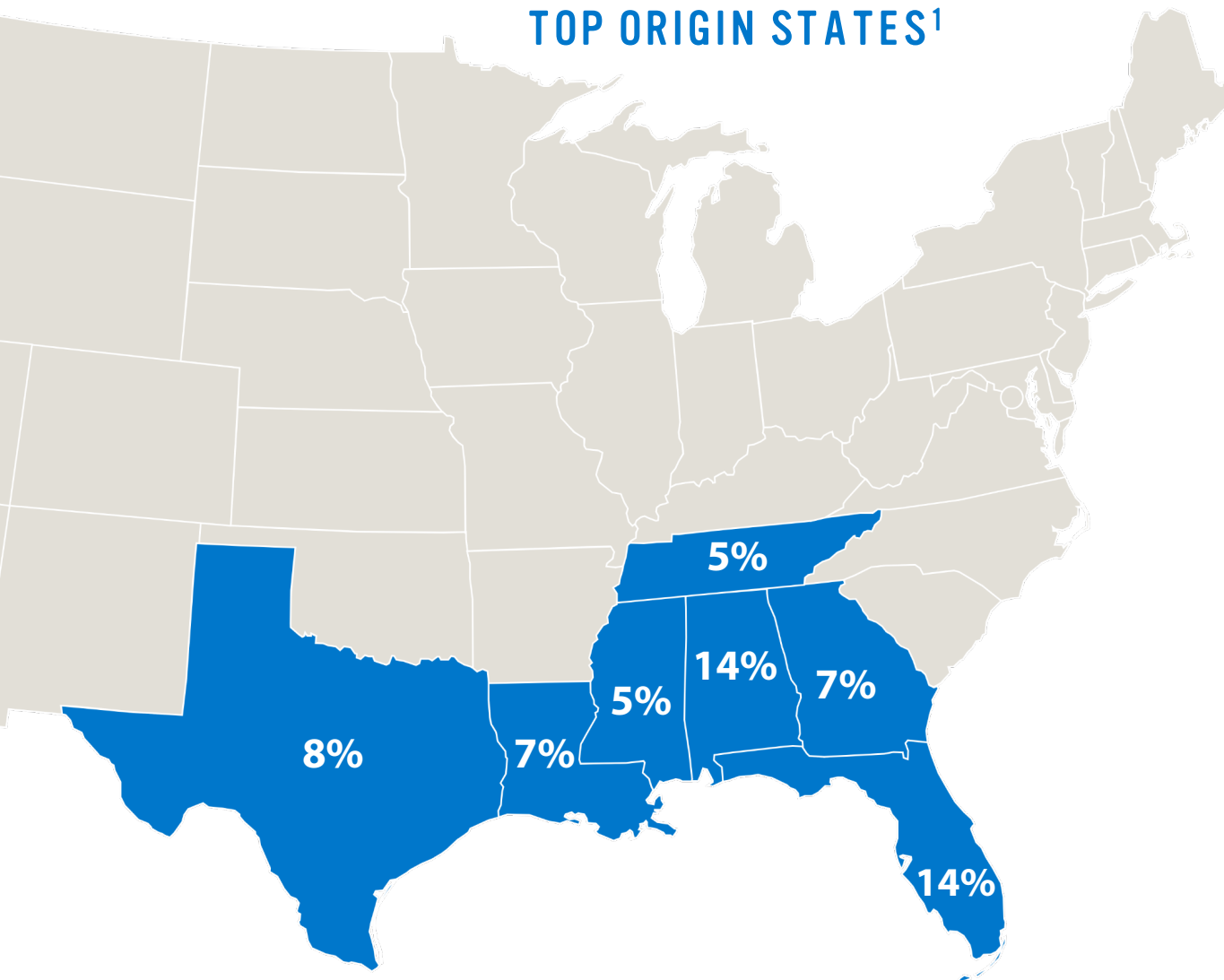
**Television**  
**22%**  
(23% in 2024)



**Visit Pensacola social media**  
**16%**  
(18% in 2024)

<sup>1</sup> Multiple responses permitted.

## TOP ORIGIN STATES<sup>1</sup>



TOP MARKETS	2024	2025 <sup>1</sup>
Mobile <sup>2</sup>	15%	15%
Atlanta	5%	5%
New Orleans	3%	4%
Dallas – Fort Worth	3%	3%
Birmingham	2%	3%
Nashville	3%	3%
Houston	2%	2%
Montgomery	1%	2%

The **2%** of visitors who traveled **internationally** to the Pensacola area came from Ontario, Germany, Ireland, Denmark, and Manitoba.

<sup>1</sup> Sources: Zartico and Visitor Tracking Study.

<sup>2</sup> Mobile DMA spans across Florida, Alabama, and Mississippi.



# TOP ACTIVITIES DURING VISIT

JULY TO SEPTEMBER 2025



**Restaurants**  
**83%**  
(83% in 2024)



**Relax and unwind**  
**78%**  
(75% in 2024)



**Beach**  
**76%**  
(81% in 2024)



**Shopping**  
**50%**  
(37% in 2024)



**Attractions**  
**36%**  
(34% in 2024)



**Art galleries/museums**  
**34%**  
(34% in 2024)



**Bars/nightclubs**  
**33%**  
(24% in 2024)



**Visit friends/relatives**  
**32%**  
(28% in 2024)



**Family time**  
**30%**  
(37% in 2024)

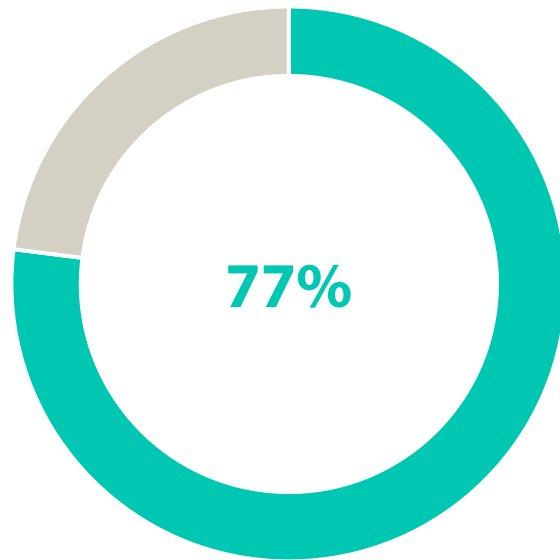


**Water sports**  
**25%**  
(26% in 2024)



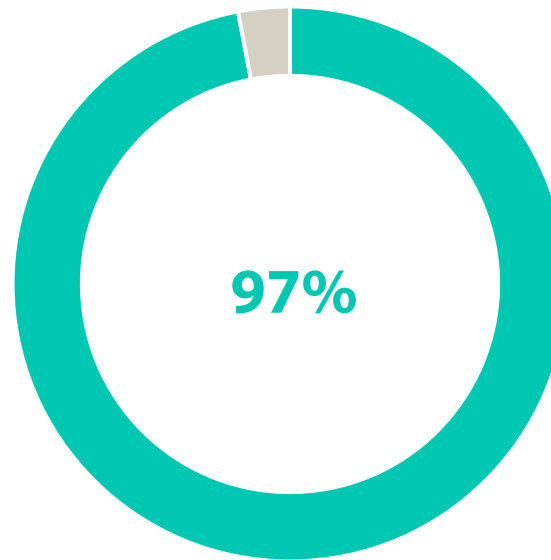
**Special events**  
**25%**  
(16% in 2024)

<sup>1</sup> Multiple responses permitted.



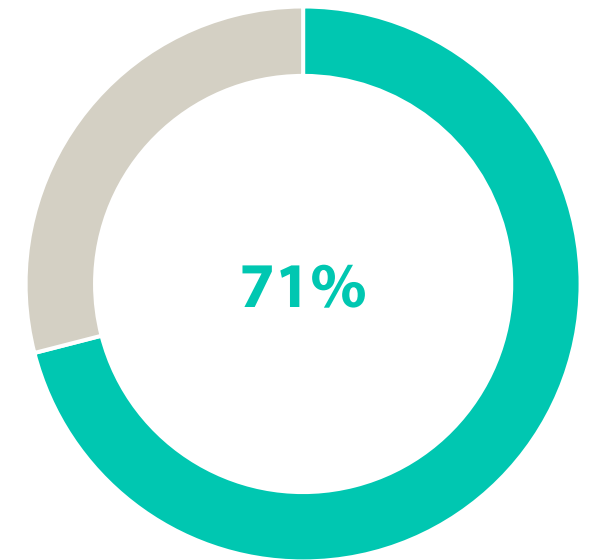
## VERY SATISFIED

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.



## DEFINITELY WILL RETURN

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





## AREA DESCRIPTORS

- » **Iconic beaches** – “The whitest sand and clearest water.” / “Beautiful white sand and turquoise water. Just like the ad says.”
- » **Friendly and welcoming vibe** – “The nicest and friendliest people.” / “Friendly people, easy to get around, lots of live music, beautiful beaches.” / “Visiting parents and checking out the area. Nice people. Beautiful beaches. Good restaurants. I see why they moved here.”
- » **Relaxing, laid-back, peaceful** – “Very laid back. It’s paradise.” / “A wonderful place to relax and unwind.”
- » **Family-friendly** – “Perfect family beach.” / “A really good choice for a family vacation...lots of options when the weather didn’t cooperate.”
- » **Charming Downtown** – “Very charming downtown with lots of parks.” / “Great downtown area with lots of green space.” / “So many cute shops and restaurants downtown.”

## AREAS FOR IMPROVEMENT

- » **Parking** – “Parking is a nightmare/terrible.” / “Downtown...except the parking.”
- » **Crowds** – “The kids loved the children's museum and of course we all loved seeing the blue angels perform. It is very crowded though so if you're avoiding crowds don't visit when the blues are flying.” / “Way too many people, but fun.”

\*Open-ended responses to the question “If you were talking to a friend, how would you describe the Pensacola area as a place to visit?”

# QUARTERLY SNAPSHOT: JULY - SEPTEMBER 2025

COMPARED TO JULY - SEPTEMBER 2024, IN JULY - SEPTEMBER 2025...

-  **Occupancy** was up **+0.1%** and **ADR** was up **+0.6%**, resulting in a **RevPAR** that was up **+0.7%**.
-  Smaller travel party sizes and fewer visitors staying with friends/relatives or in their second homes contributed to a **decrease in overall visitation** (-3.8%).
-  Visitors have a **longer trip planning window** of about **62 days** in advance (+7 days longer than last year).
-  More visitors utilized **friends/family** (+5% points) to plan their trip but fewer visitors used their **personal social media** in planning their trip (-5% points).
-  More visitors **recalled advertising** about the Pensacola area (+8% points). Of the **35%** of visitors who recalled advertising, they were more likely to see it on a **VisitPensacola.com** (+11% points), **rental agencies/booking websites** (+8% points), and **weather apps** (+5% points).
-  A decrease in **length of stay** (4.0 vs 4.1 in 2024) and **room nights** (-0.4%) contributed to the decrease in **TDT** (-1.6%).
-  Visitor **spending** was up **+4.3%** with a **higher yield per visitor** (+8.4%).
-  Visitors were more likely to **travel with children under the age of 20** (+9% points).
-  There was an **increase in repeat visitors** as **33%** of visitors have visited the Pensacola area **more than 10 times** (+13% points).
-  Advertising influenced **18% of all visitors** to come to the Pensacola area (+3% points).



# VISITOR PROFILE DETAILED FINDINGS





# STUDY OBJECTIVES: VISITOR JOURNEY



# VISITOR JOURNEY: PRE-VISIT



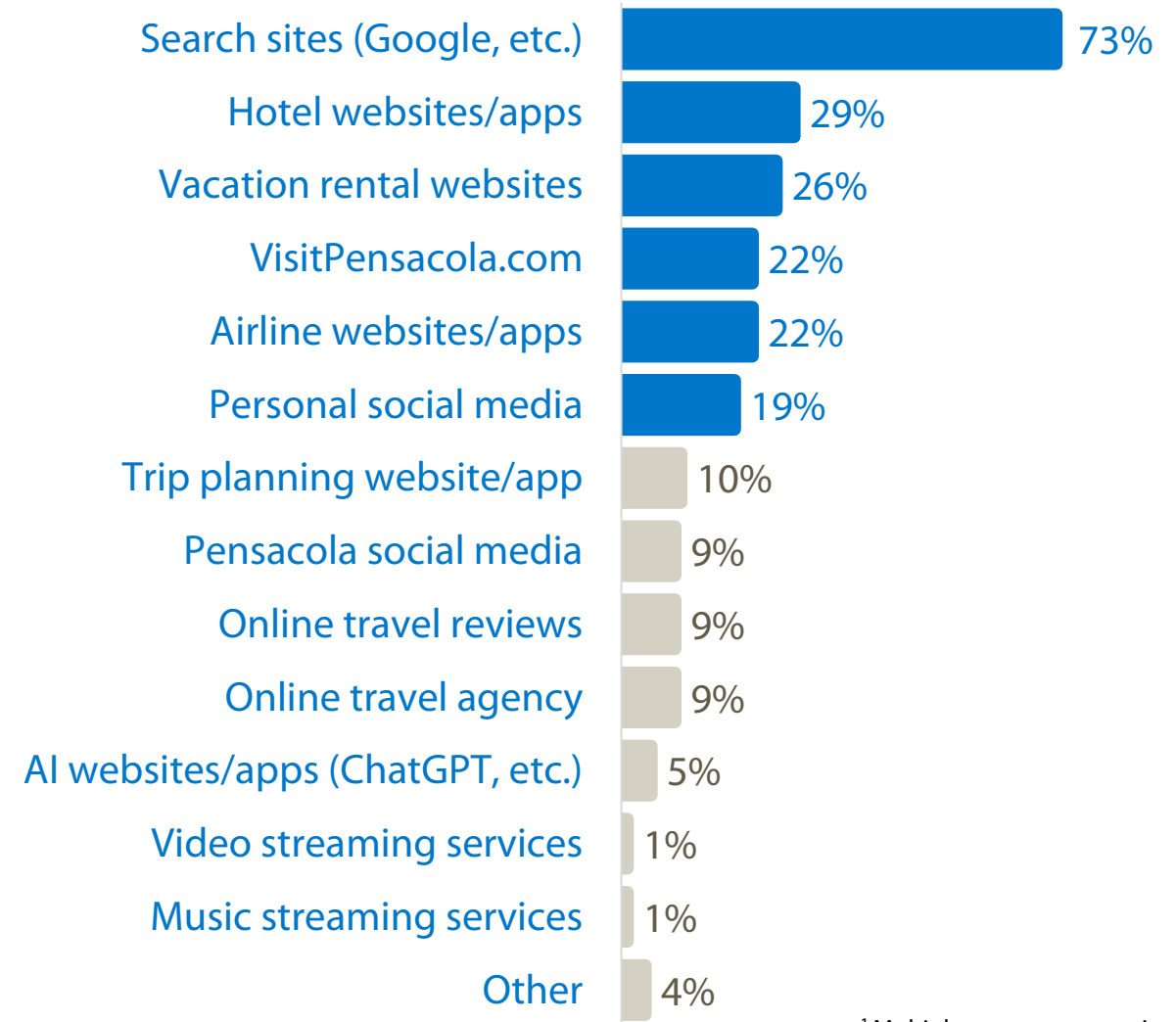
- » Visitors to the Pensacola area have short trip planning windows, as **nearly half** of visitors planned their trip to the Pensacola area **a month or less in advance** (54% in 2024)
- » On the other hand, **1 in 3** visitors planned their trip between **2 and 3 months in advance** (33% in 2024)
- » Average trip planning cycle began **62 days** before the trip (55 days in 2024)



# ONLINE TRIP PLANNING SOURCES<sup>1</sup>

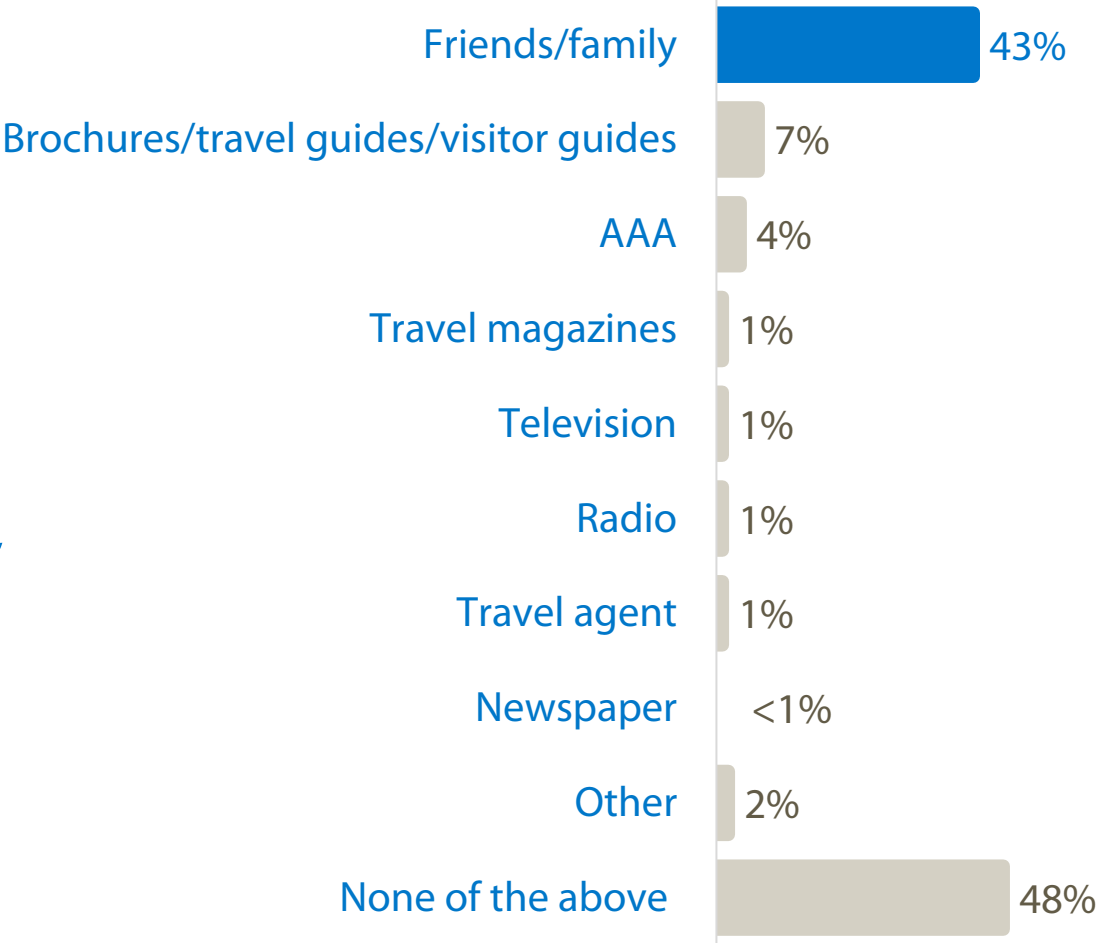
JULY TO SEPTEMBER 2025

- » **Search sites, such as Google,** continue to be the **number one planning source** for trips to the Pensacola area
- » **Nearly 3 in 10** visitors used **hotel websites/apps** and **over 1 in 4** visitors used **vacation rental websites** to plan their trip – all proving to be good advertising mediums for the Pensacola area
- » **Over 1 in 5** visitors used **VisitPensacola.com** and **airline websites/apps** to plan their trip
- » **Nearly 1 in 5** visitors planned their trip with their **personal social media**



<sup>1</sup> Multiple responses permitted.

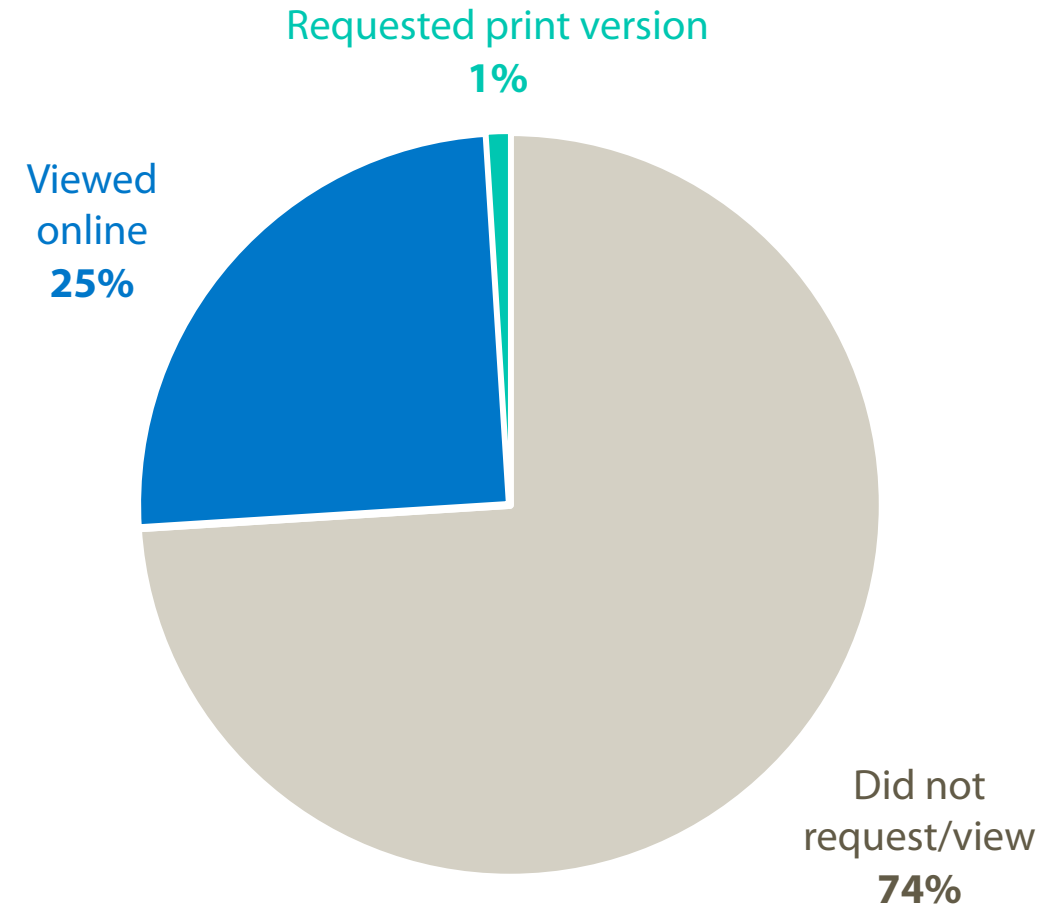
- » **Over 2 in 5** visitors planned their trip to the Pensacola area through **friends/family**
- » **1 in 14** visitors used **brochures, travel guides, and/or visitor guides**



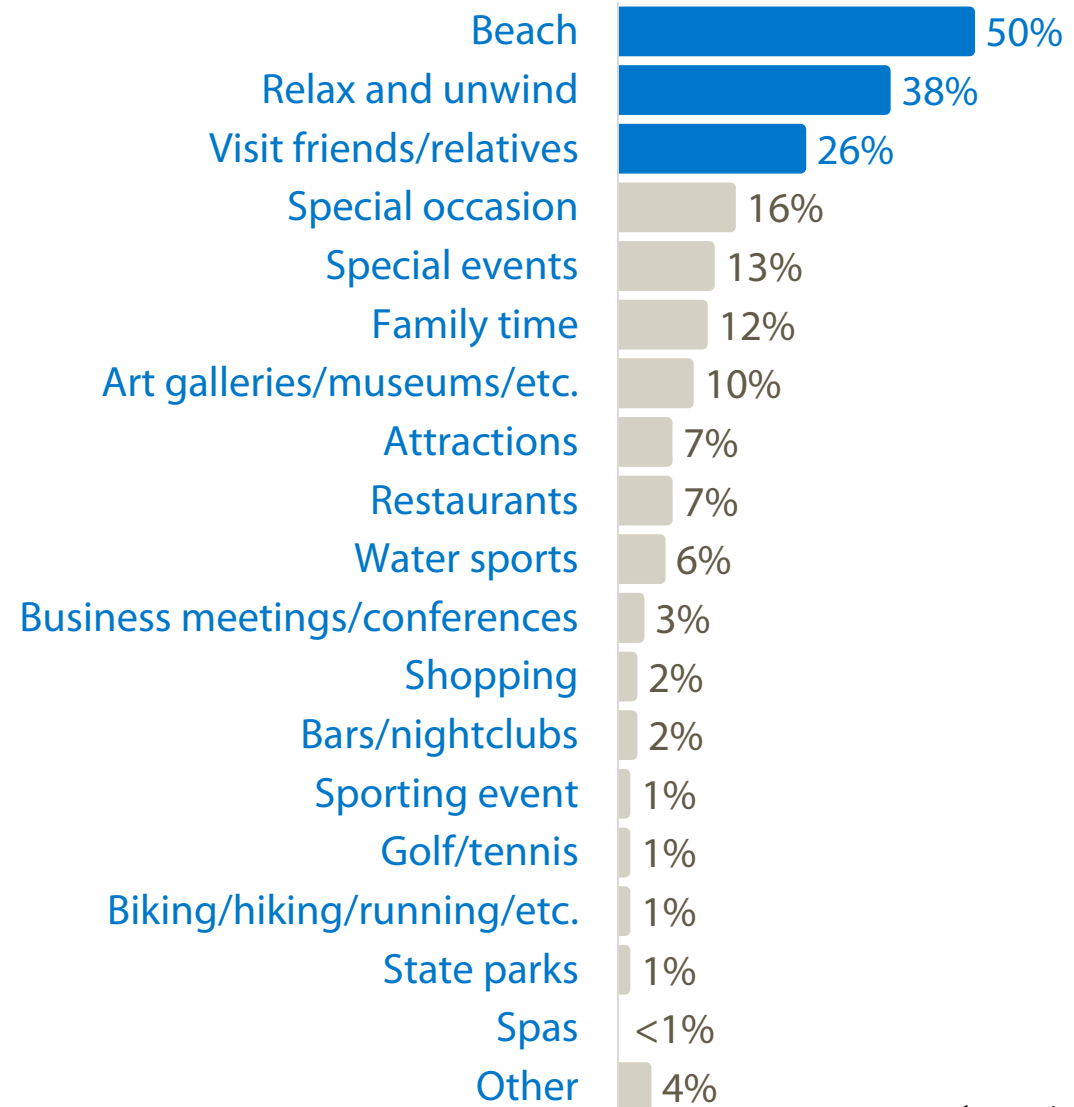
<sup>1</sup> Multiple responses permitted.



- » **Over 1 in 4** visitors **requested or viewed** the Pensacola Visitors Guide (20% in 2024)
- » **Online** viewership of the Pensacola Visitor Guide was **significantly greater than print consumption**

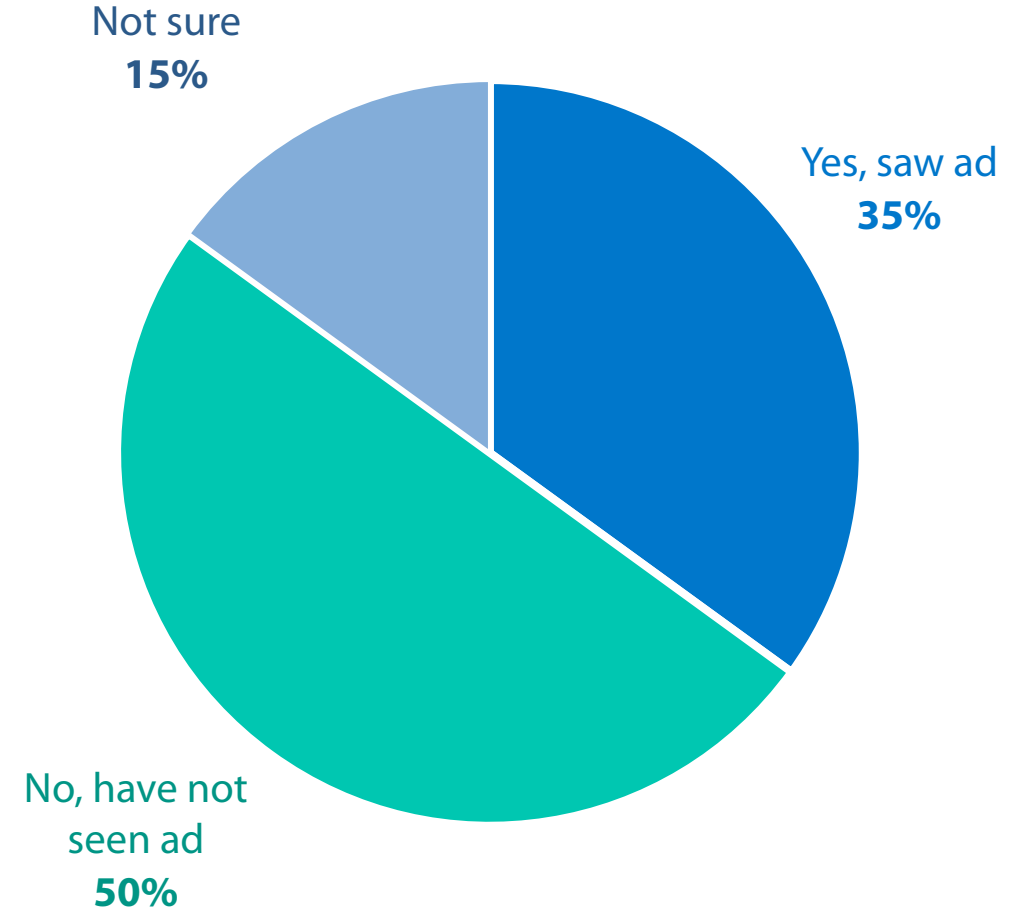


- » **Half** of visitors came to the Pensacola area to visit the **beach**
- » **Nearly 2 in 5** visitors came to **relax and unwind**
- » **Over 1 in 4** visitors came to **visit friends and relatives**



<sup>1</sup> Up to three responses permitted

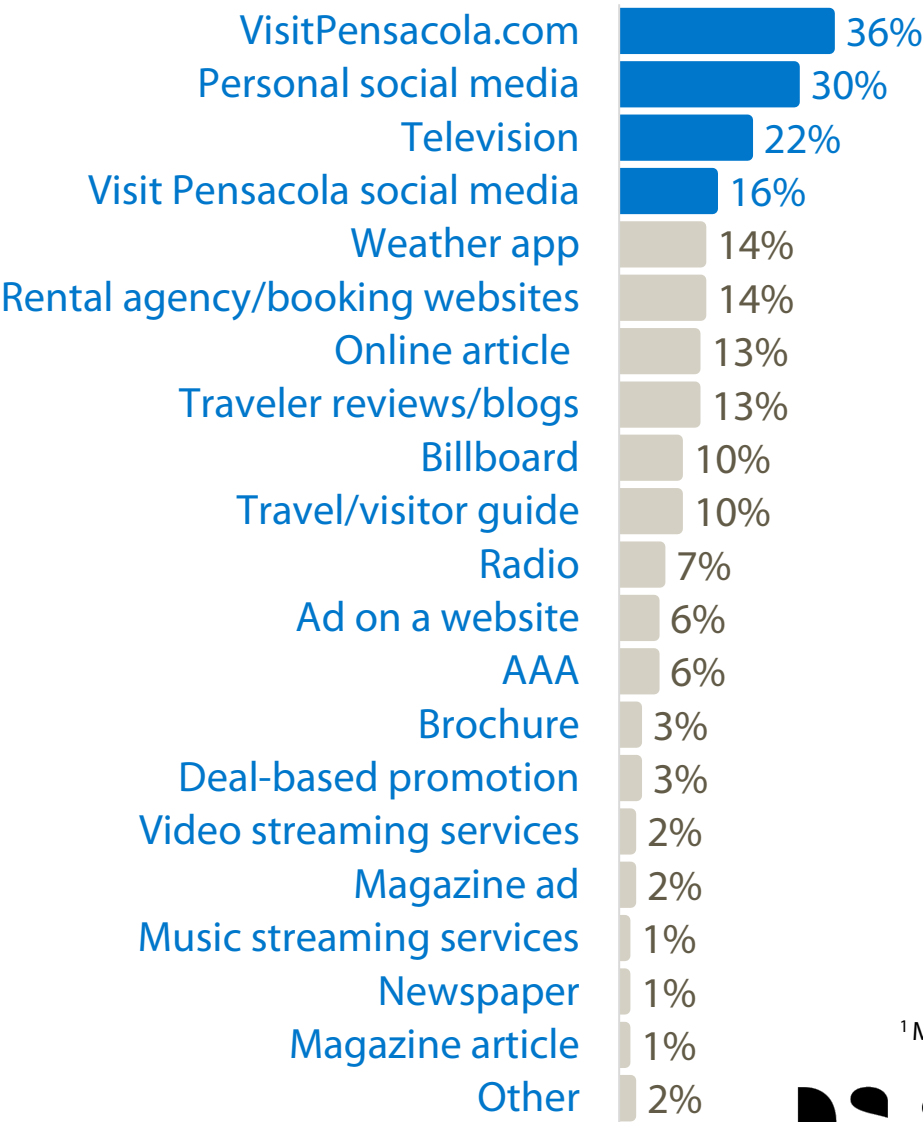
» **Over 1 in 3** visitors **recalled advertising** about the Pensacola area (27% in 2024)



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

- » **Over 1 in 3** visitors noticed advertising on **VisitPensacola.com**
- » **3 in 10** visitors noticed advertising on **personal social media**
- » **Over 1 in 5** visitors noticed advertising on **television**
- » **1 in 6** visitors noticed advertising on **Visit Pensacola social media**

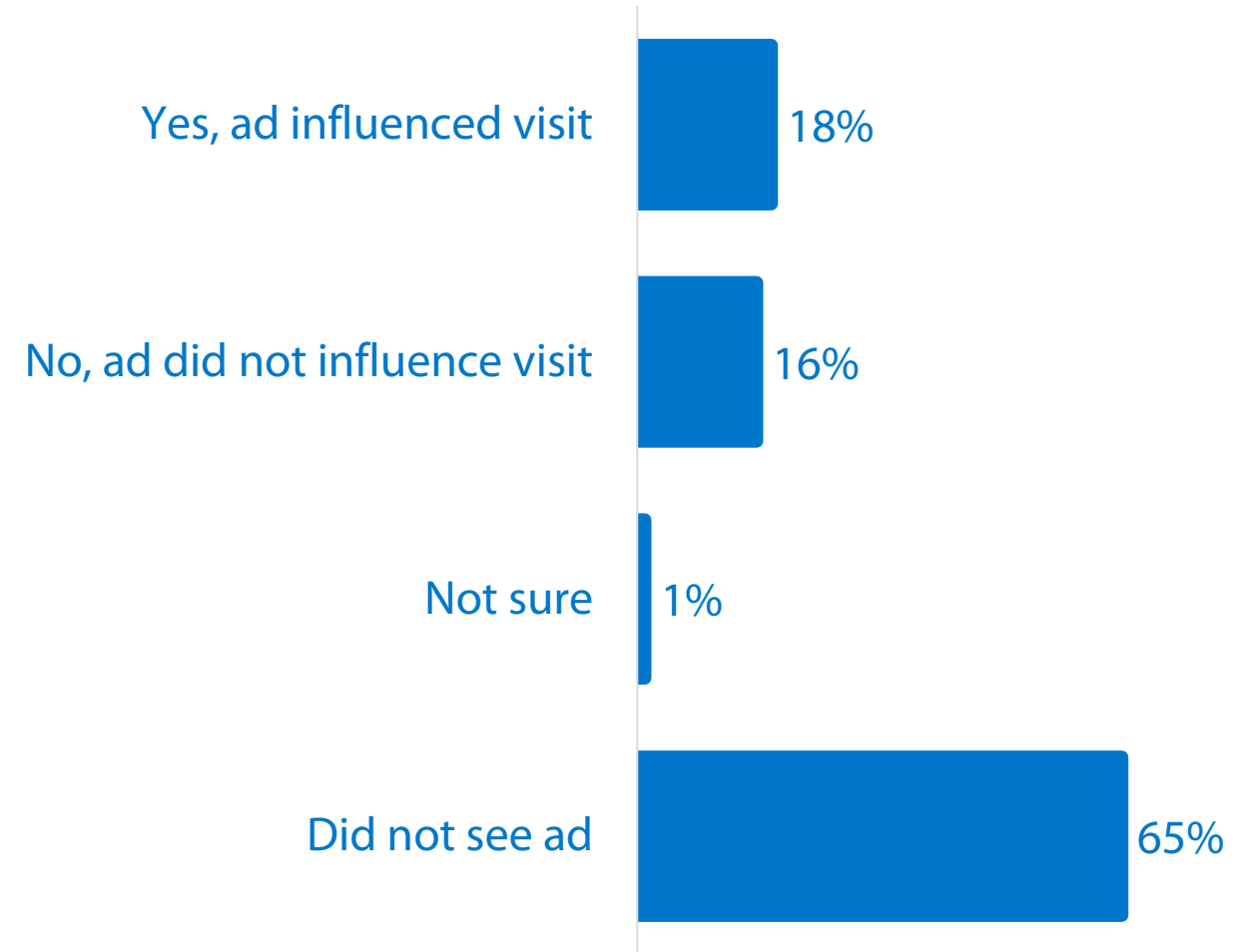
Base: **35%** of visitors who recalled advertising



<sup>1</sup> Multiple responses permitted.



» **18%** of **all visitors** were influenced by an ad to visit the Pensacola area (15% in 2024)

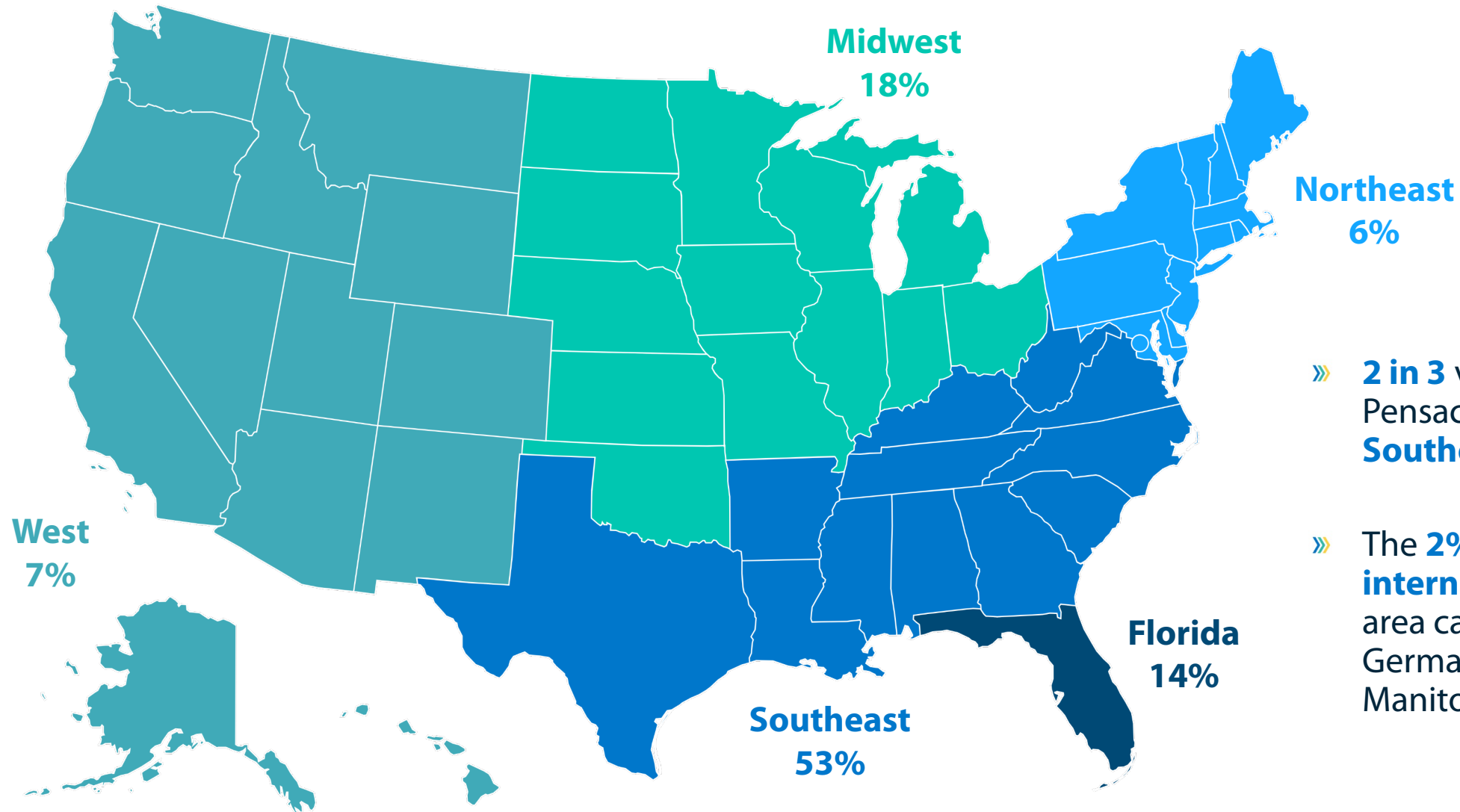


# VISITOR JOURNEY: TRAVEL PARTY PROFILE



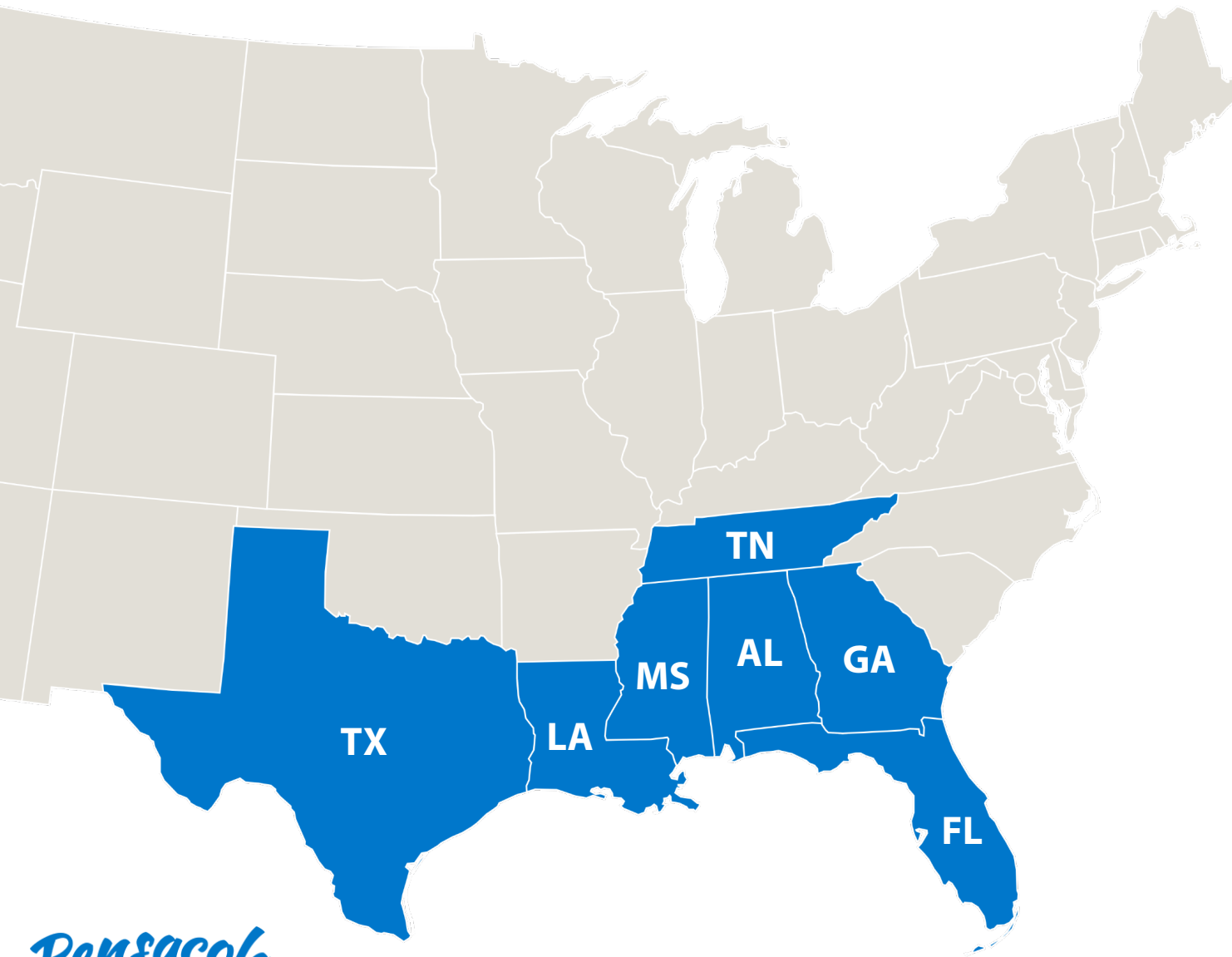
# REGION OF ORIGIN<sup>1</sup>

JULY TO SEPTEMBER 2025



- » **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 from Ontario, Germany, Ireland, Denmark, and Manitoba

<sup>1</sup> Sources: Zartico and Visitor Tracking Study.



STATE	2024	2025 <sup>1</sup>
Florida	15%	14%
Alabama	12%	14%
Texas	8%	8%
Louisiana	5%	7%
Georgia	7%	7%
Tennessee	5%	5%
Mississippi	4%	5%

**60%** of visitors traveled from **7** states

<sup>1</sup> Sources: Zartico and Visitor Tracking Study.



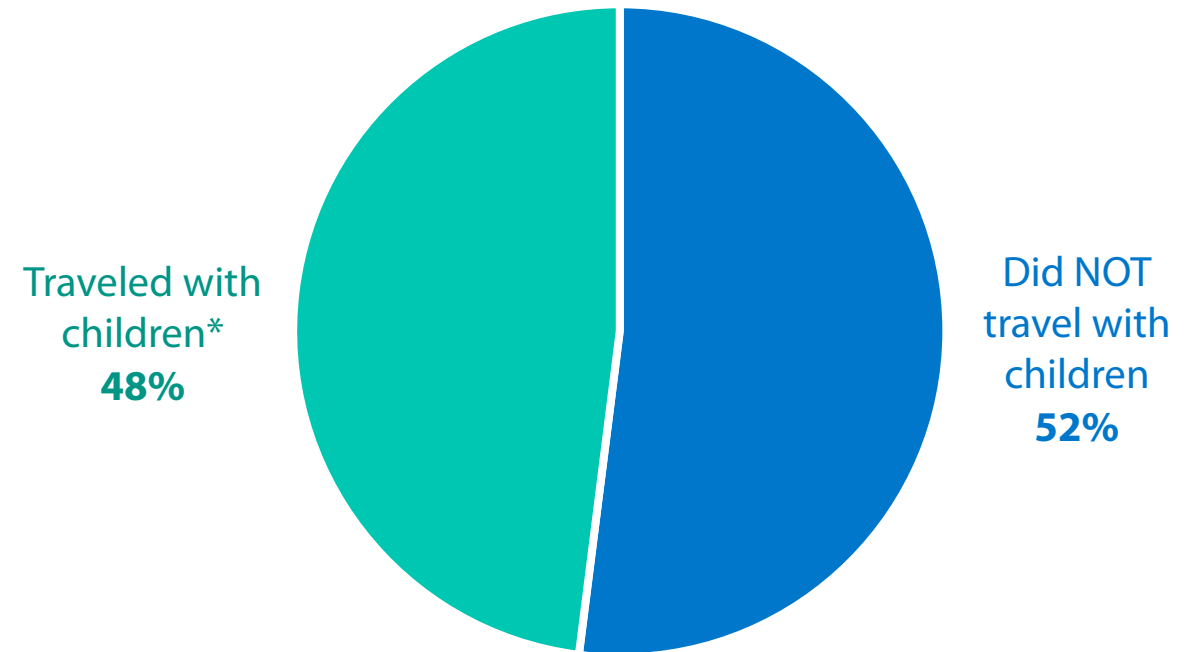
- » **Mobile**<sup>2</sup> continues to be the top DMA for the Pensacola area
- » **37%** of visitors traveled from **8** market areas

MARKETS	2024	2025 <sup>1</sup>
Mobile <sup>2</sup>	15%	15%
Atlanta	5%	5%
New Orleans	3%	4%
Dallas – Fort Worth	3%	3%
Birmingham	2%	3%
Nashville	3%	3%
Houston	2%	2%
Montgomery	1%	2%

<sup>1</sup> Sources: Zartico and Visitor Tracking Study.

<sup>2</sup> Mobile DMA spans across Florida, Alabama, and Mississippi.

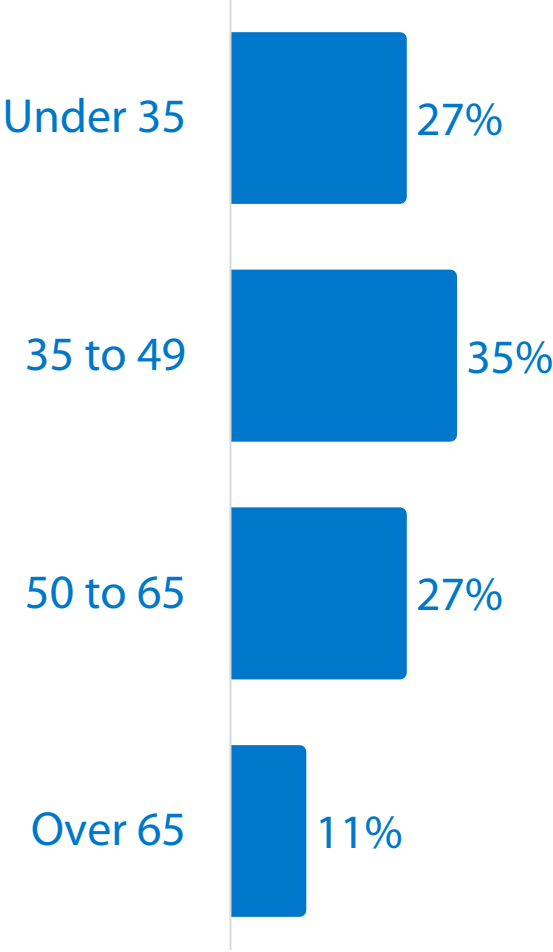
- » For **all visitors**<sup>1</sup>, the typical **travel party size** was **2.9** (3.1 in 2024)
- » The typical **travel party size** for visitors staying in **paid accommodations** was **3.1** (3.3 in 2024)
- » **Nearly half** of travel parties included **children under the age of 20** (39% in 2024)



<sup>1</sup> Includes visitors staying in paid accommodations, nonpaid accommodations, and day trippers.

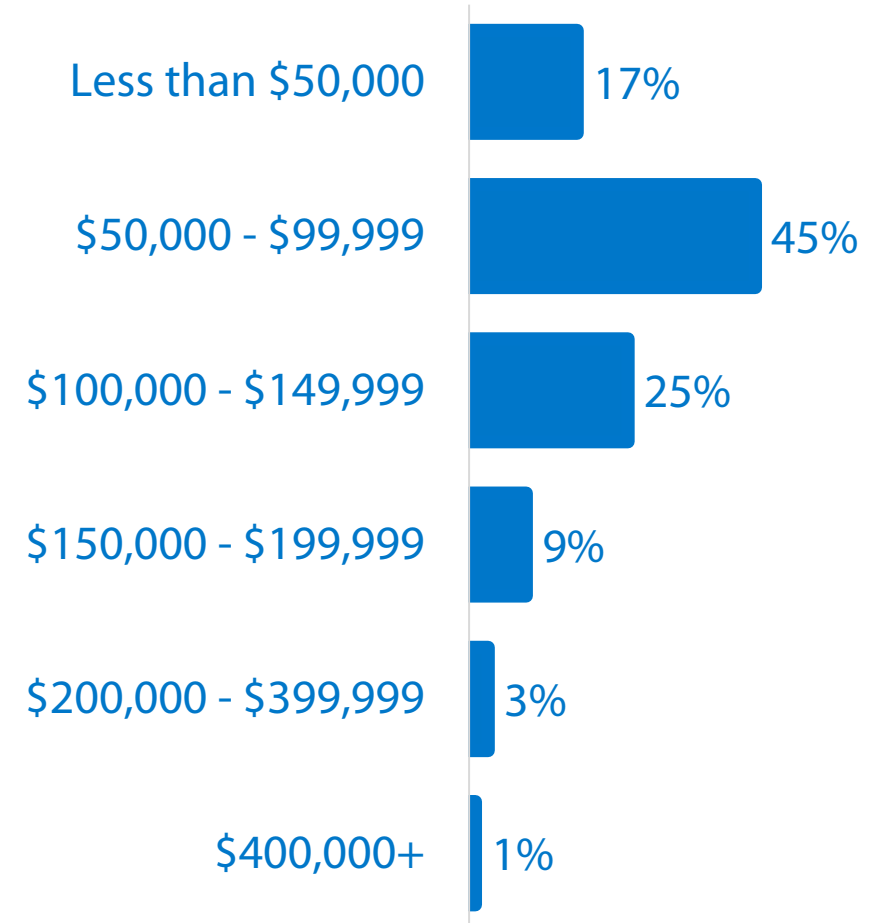
\*Children are considered people under the age of 20

» The median **age**<sup>1</sup> of visitors to the Pensacola area was **45** (43 in 2024)



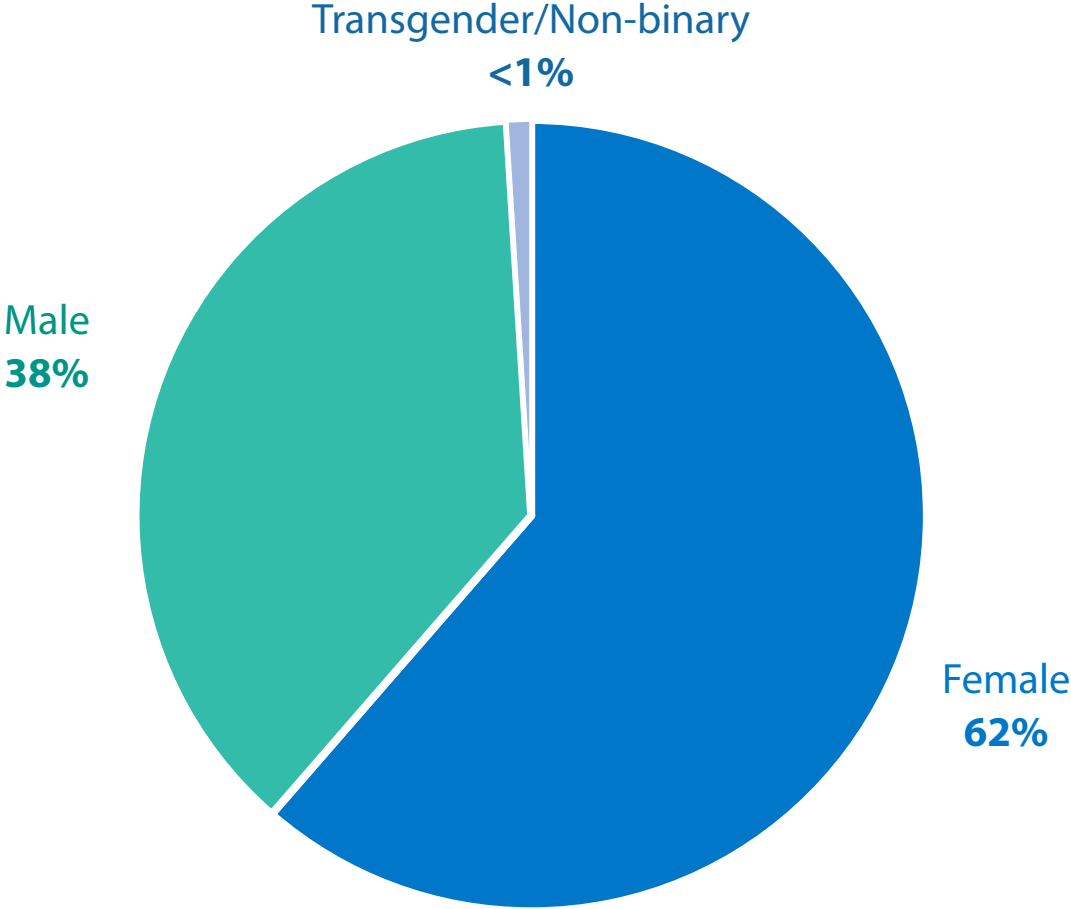
<sup>1</sup>Age of member of travel party surveyed.  
The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

- » Visitors to the Pensacola area had a **median household income** of **\$86,700** per year (\$86,700 in 2024)
- » **13%** of visitors had household incomes **over \$150,000**



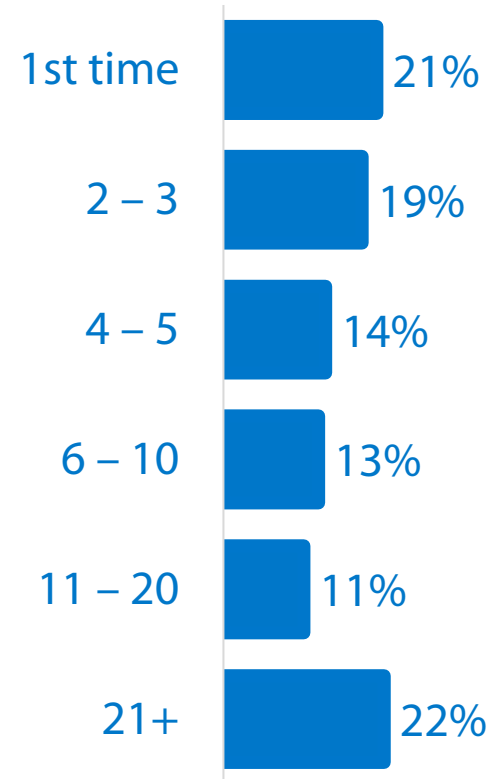


» **62%** of visitors interviewed were **female**<sup>1</sup>  
(59% in 2024)



<sup>1</sup>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.

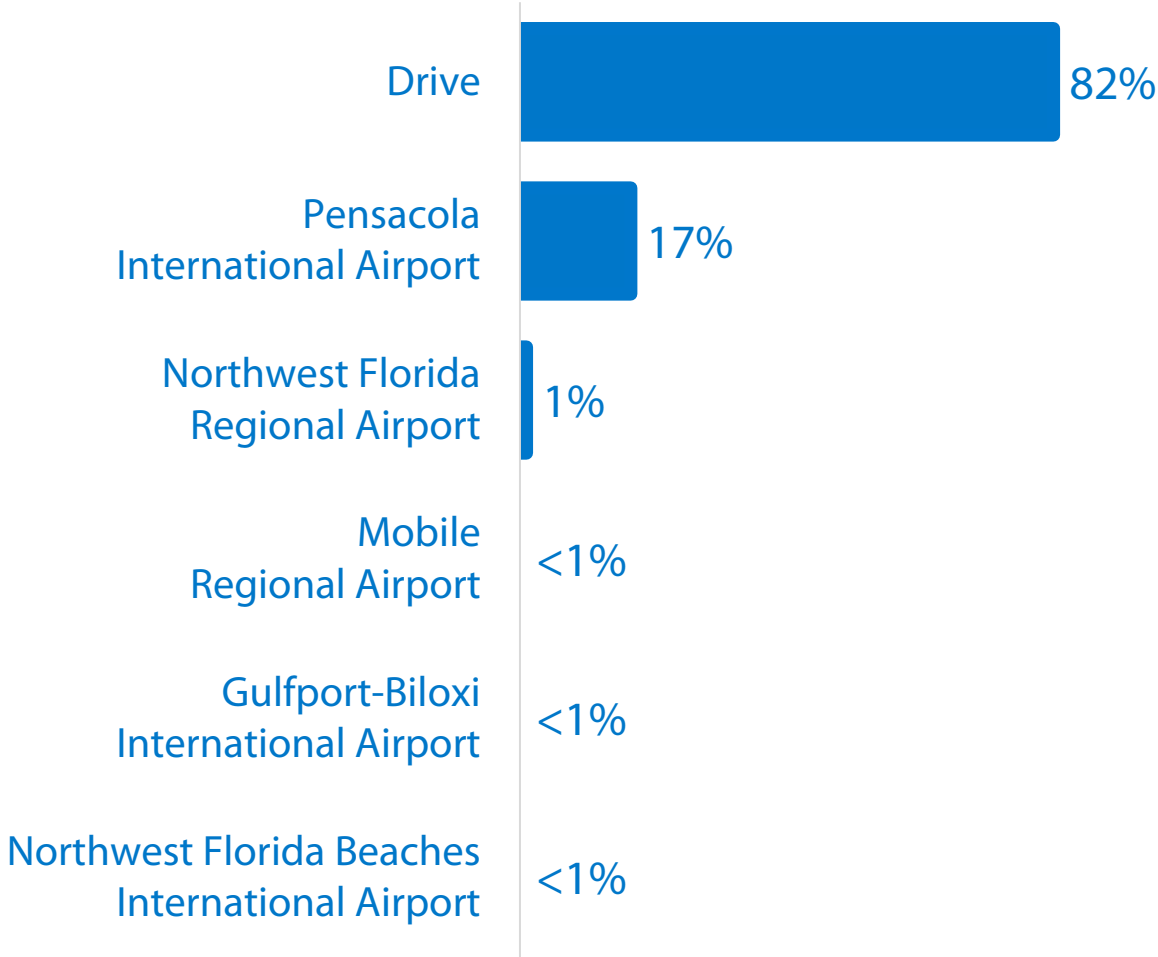
- » **Over 1 in 5** visitors said this was their **first time visiting** the Pensacola area (30% in 2024)
- » **1 in 3** visitors are loyalists, having **visited the Pensacola area over 10 times** (20% in 2024)



# VISITOR JOURNEY: TRIP EXPERIENCE

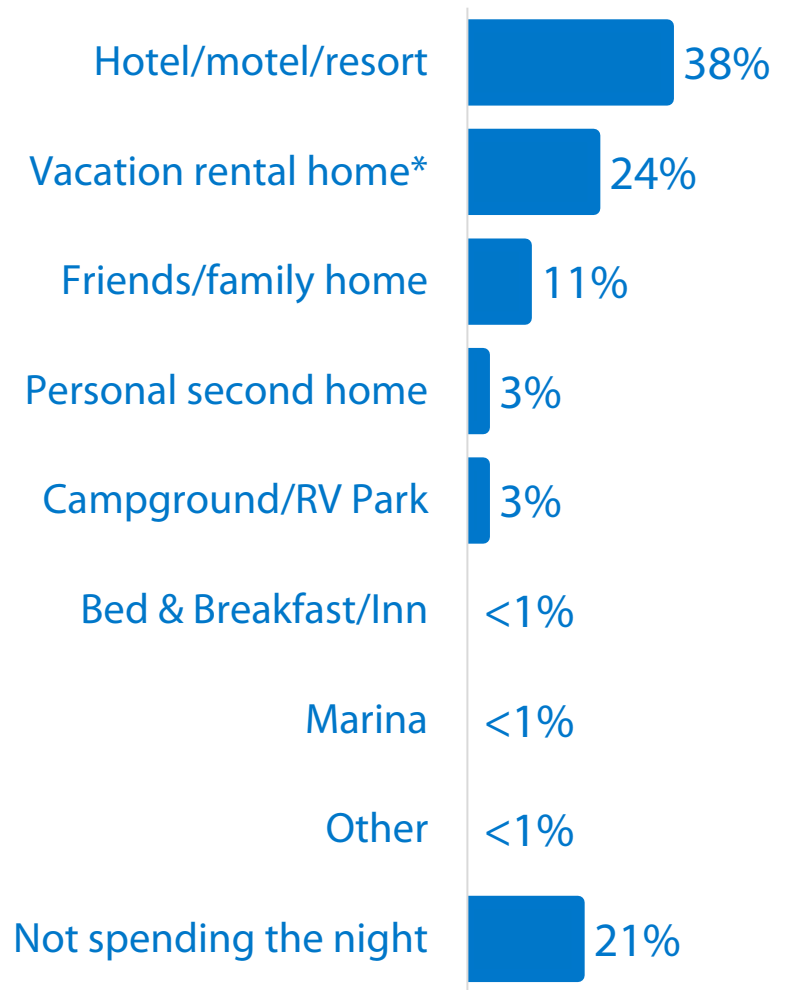


- » **Over 4 in 5** visitors **drove** to the Pensacola area for their trip (83% in 2024)
- » **17%** of **all** visitors used the **Pensacola International Airport** (16% in 2024)





- » **Over 1 in 3** visitors stayed overnight in a **hotel, motel, or resort** (39% in 2024)
- » The typical visitor<sup>1</sup> stayed **4.0** nights in Pensacola area (4.1 in 2024)
- » Visitors staying in **paid accommodations**<sup>2</sup> stayed an average of **4.5** nights in the Pensacola area (4.6 in 2024)

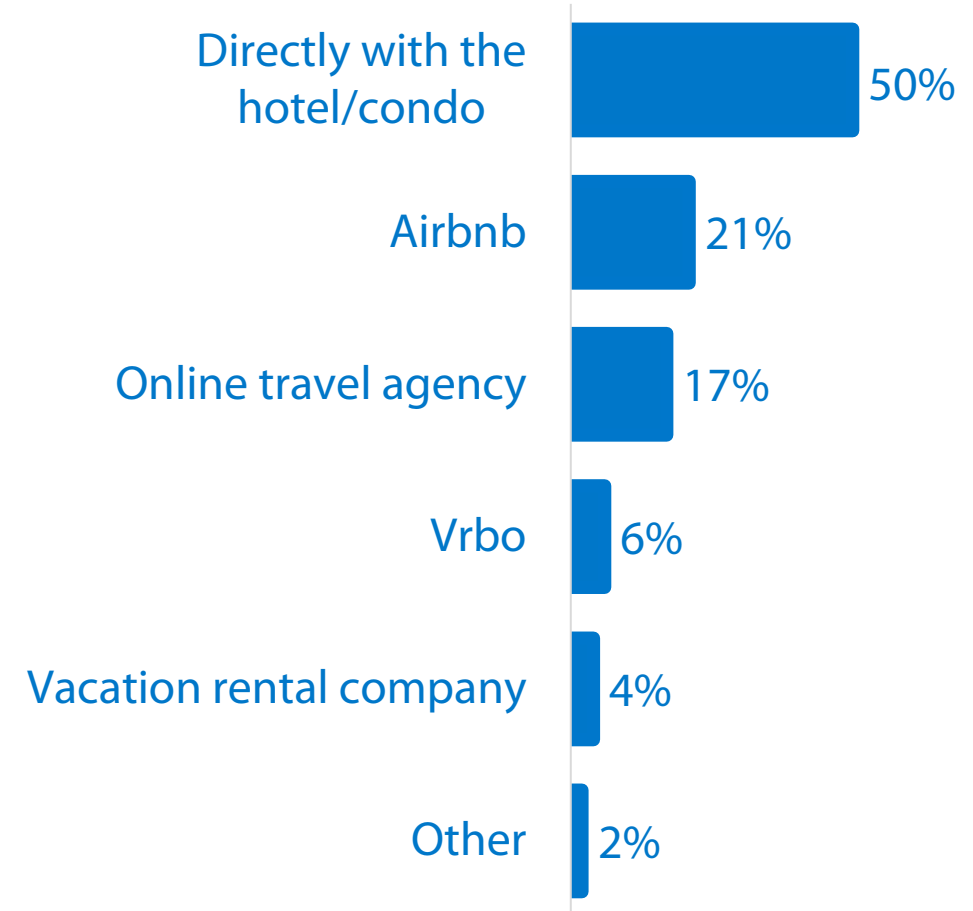


<sup>1</sup> Visitors staying in paid accommodations, nonpaid accommodations, and day trippers.

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

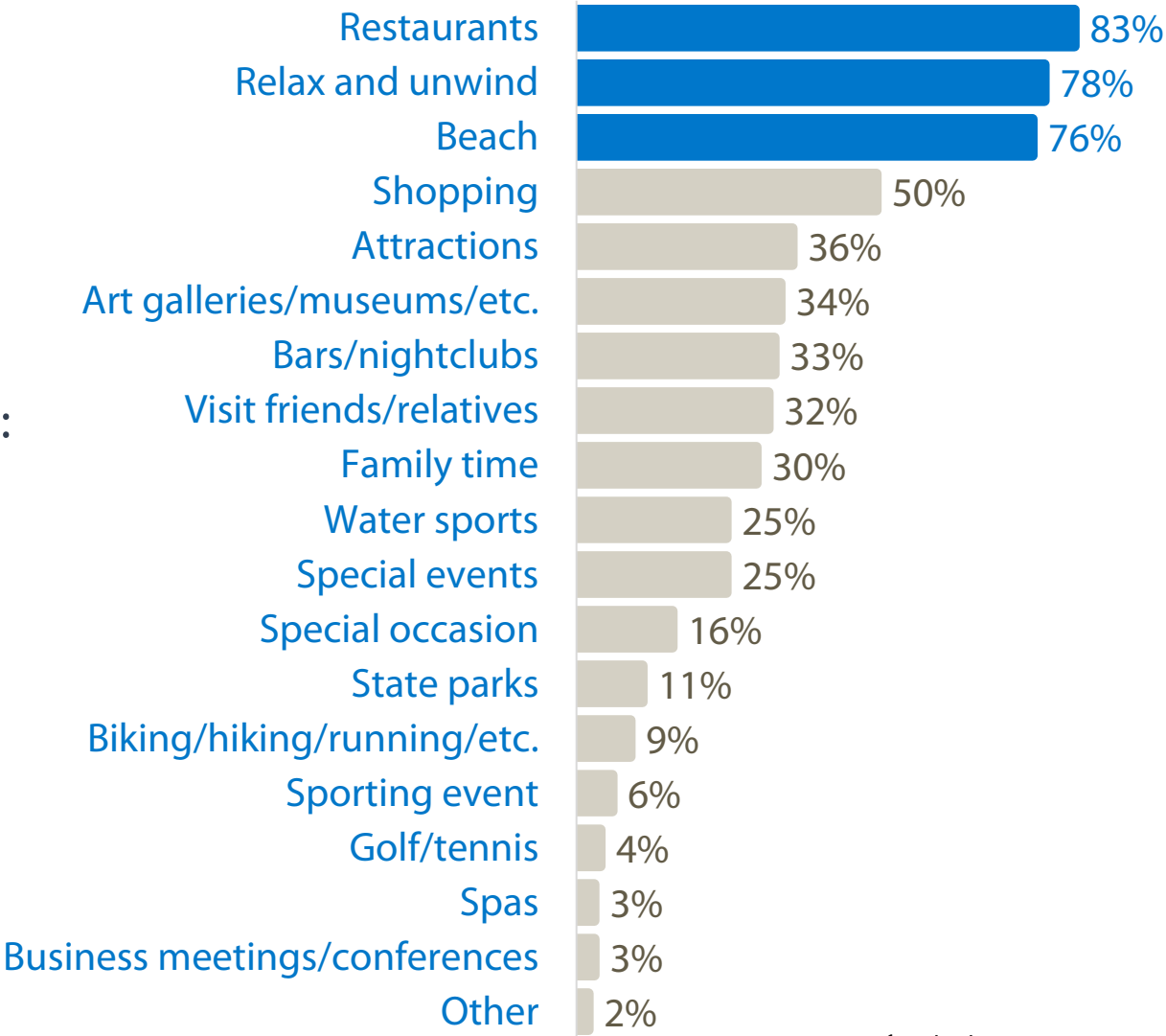
\*Includes Airbnb, Vrbo, etc.

- » **Half** of visitors booked their trip to the Pensacola area **directly with the hotel/condo** (50% in 2024)
- » **Around 1 in 5** visitors booked through **Airbnb** (22% in 2024) or an **online travel agency** (17% in 2024)



Top activities enjoyed by visitors this quarter include:

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

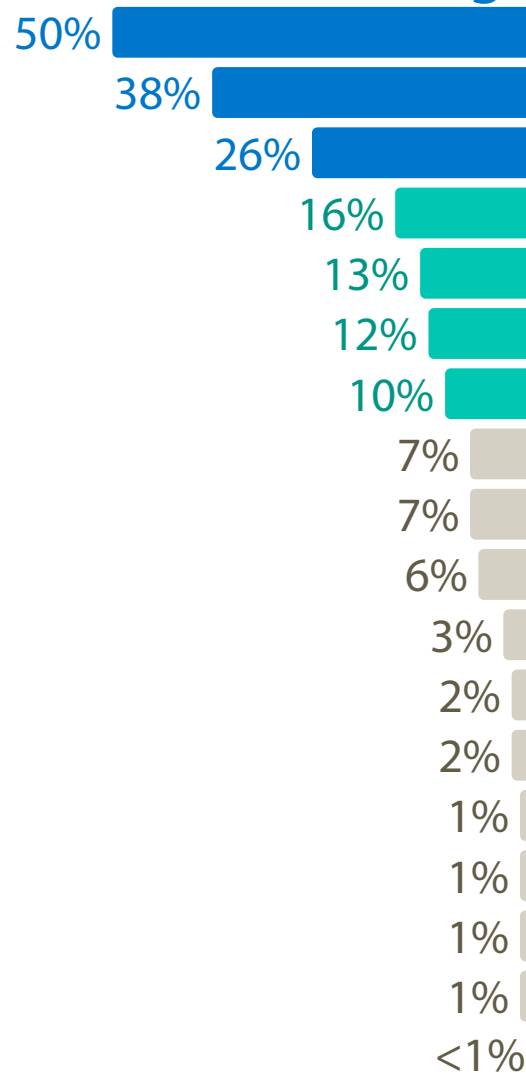


<sup>1</sup> Multiple responses permitted.

# ACTIVITIES V. REASON FOR VISIT

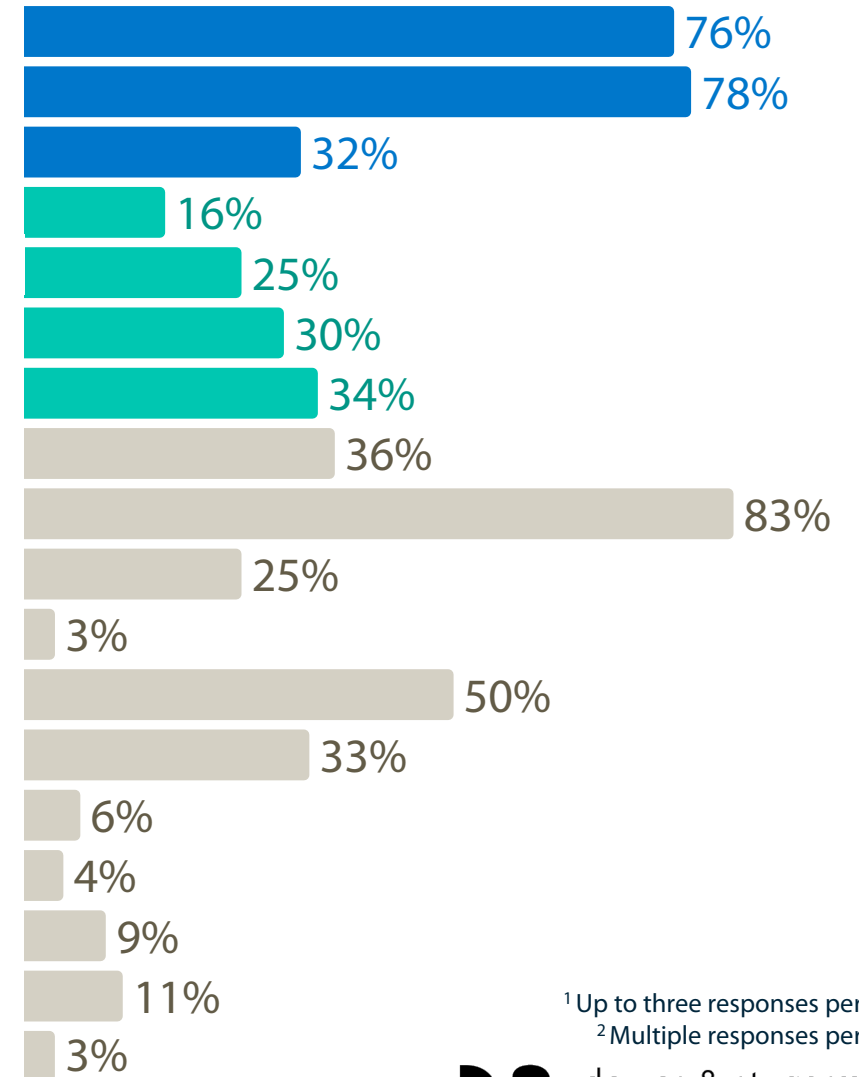
JULY TO SEPTEMBER 2025

## Reason for Visiting<sup>1</sup>



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

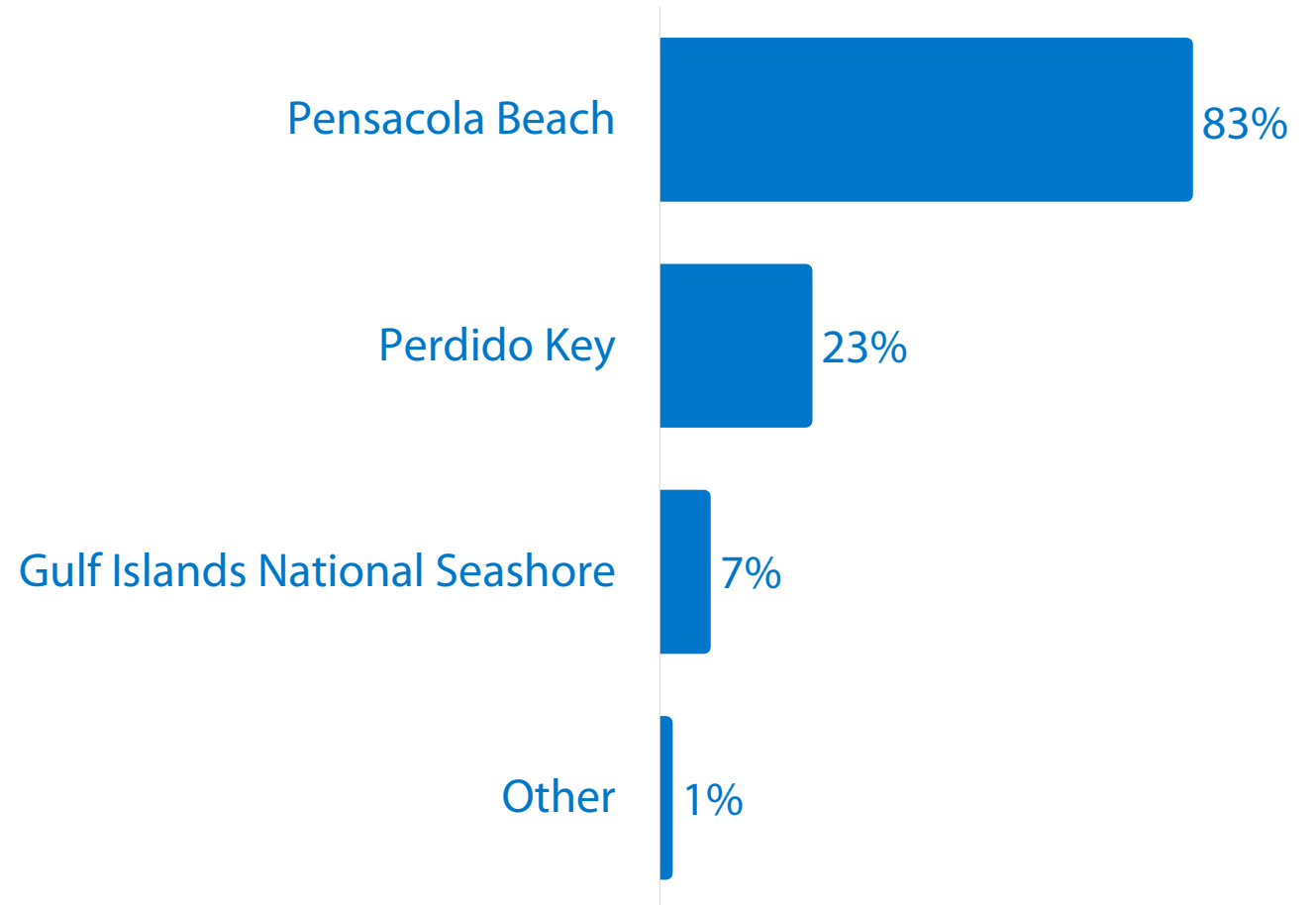
## Visitor Activities<sup>2</sup>



<sup>1</sup> Up to three responses permitted.

<sup>2</sup> Multiple responses permitted.

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



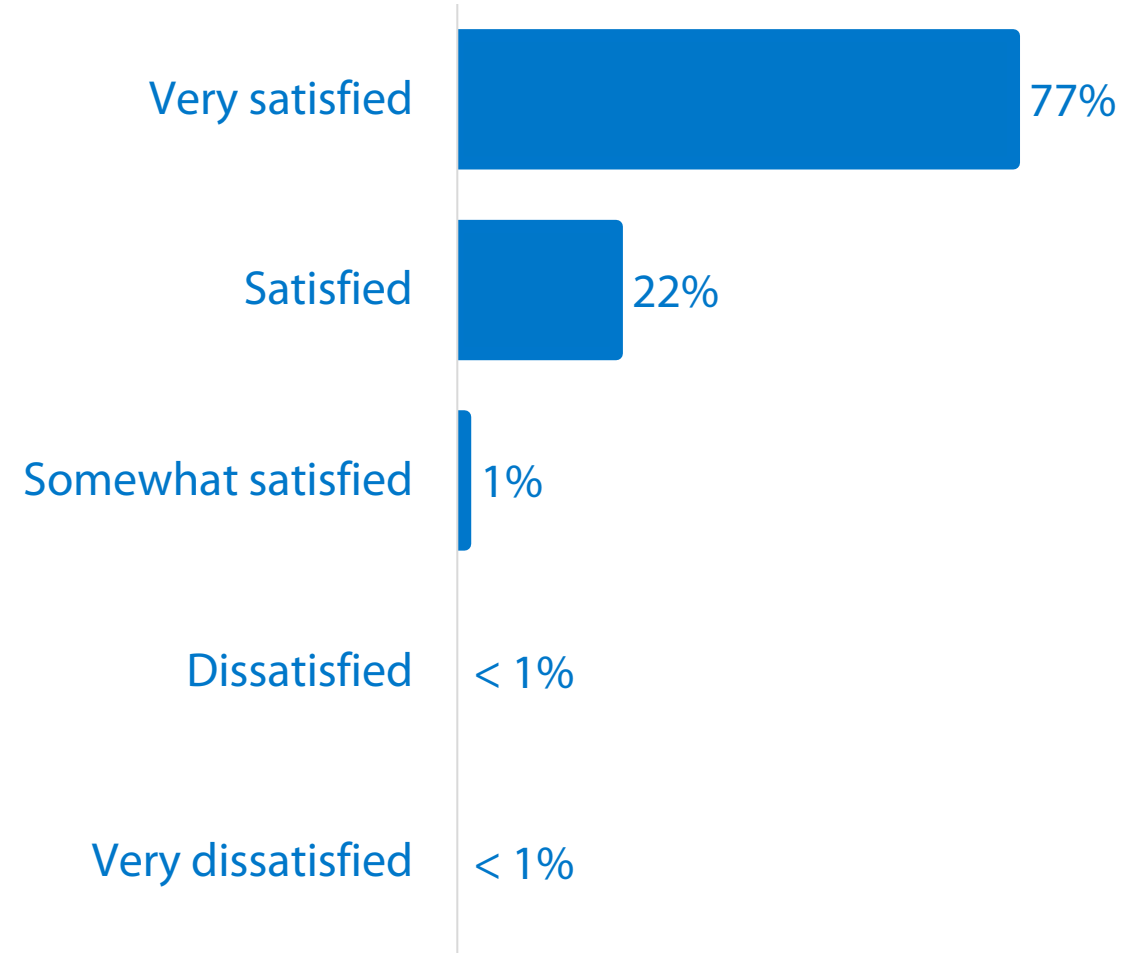
<sup>1</sup> Multiple responses permitted.



# VISITOR JOURNEY: POST TRIP EVALUATION

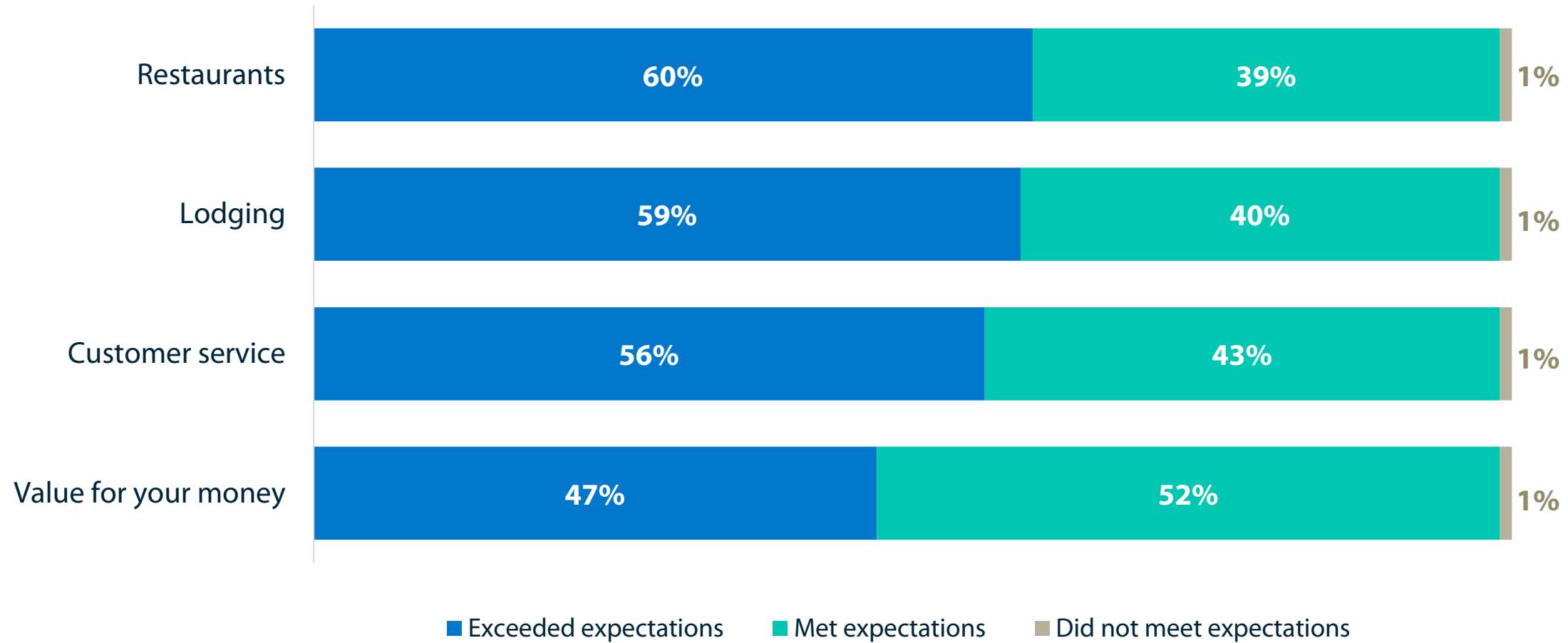


- » **99%** of visitors were **satisfied or very satisfied** with their trip to the Pensacola area (99% in 2024)
- » **Over 3 in 4** visitors were **very satisfied** with their trip to the Pensacola area (77% in 2024)
- » Those who said somewhat satisfied, dissatisfied, or very dissatisfied were asked what features they liked least about the area, which included: Traffic, high prices, and beach seaweed

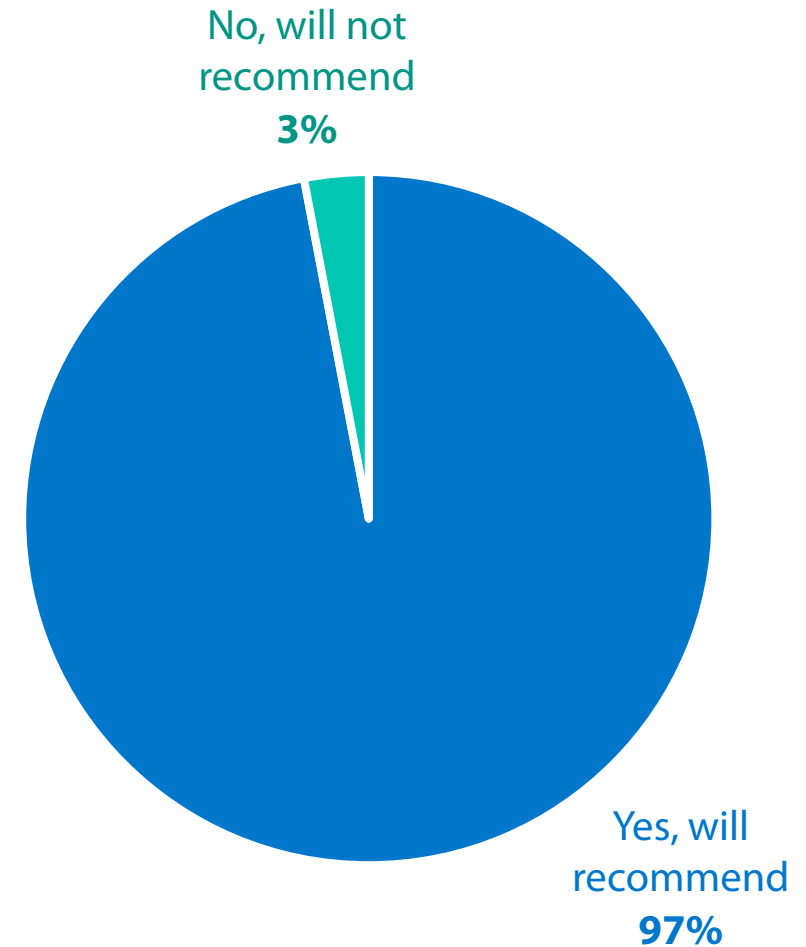


# SATISFACTION RATINGS

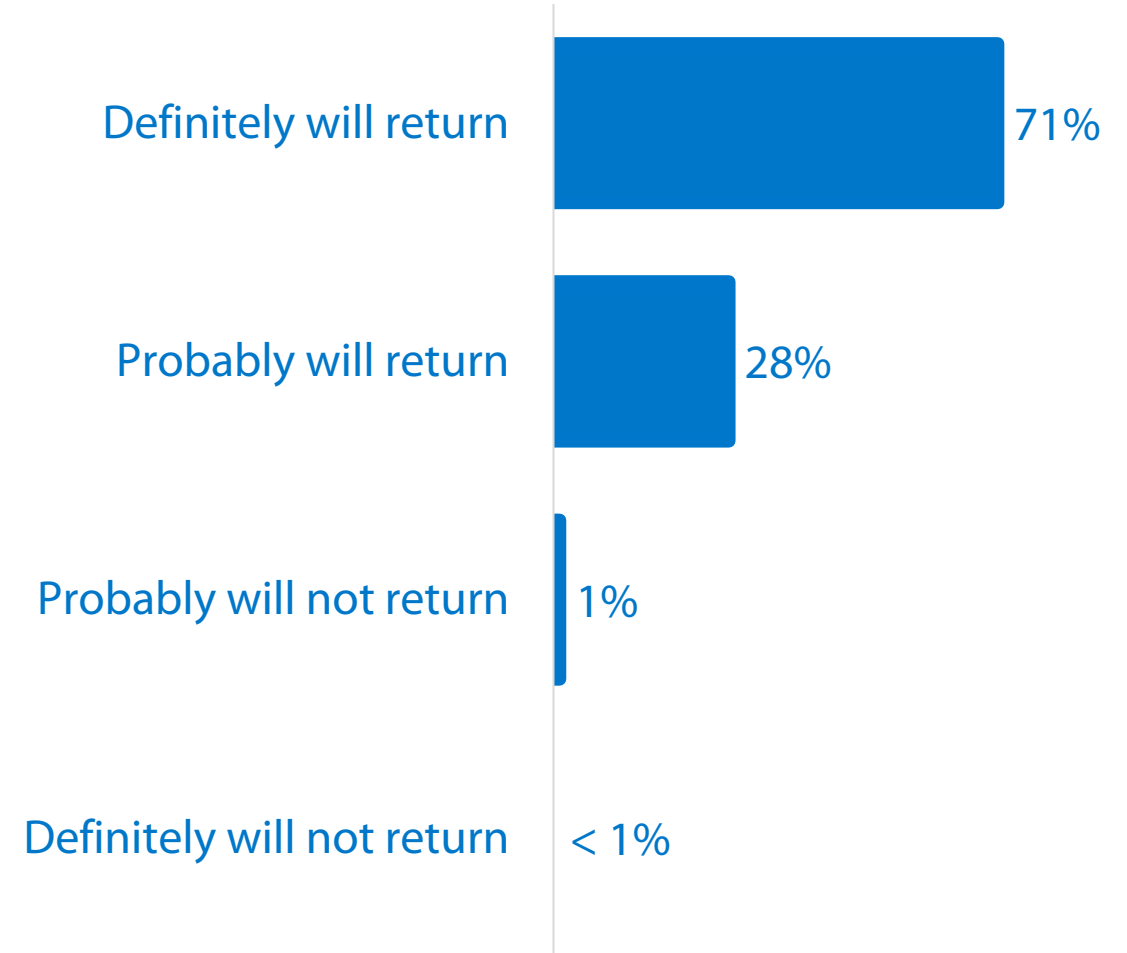
JULY TO SEPTEMBER 2025



» **Over 9 in 10** visitors would recommend the Pensacola area to others (94% in 2024)



- » **99%** of visitors would **return** to the Pensacola area (98% in 2024)
- » **Over 7 in 10** visitors would **definitely return** to the Pensacola area (71% in 2024)
- » Those who said they will not return were asked why they were uncertain, the main reason being preference for a variety in vacation spots





# VISIT PENSACOLA

## VISITOR TRACKING STUDY

### JULY – SEPTEMBER 2025

Downs & St. Germain Research  
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