

VISIT PENSACOLA

Visitor Tracking Study
July - September 2023



VISITOR JOURNEY: ECONOMIC IMPACT



QUARTERLY SNAPSHOT

July - September 2023

Direct spending was up more (+3.9%) than the number of visitors (-1.3%) as the Pensacola area generated a **higher yield per visitor (+5.2%)**



758,200

TOTAL
VISITORS

- 1.3%



657,887

ROOM
NIGHTS

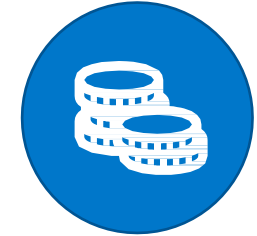
+ 2.1%



\$423,474,600

DIRECT
SPENDING

+ 3.9%



\$8,778,711

TOURISM
DEVELOPMENT TAX

- 1.5%

vs. 2022

ACCOMODATION METRICS¹

Occupancy

64.9%

- 5.8% from 2022

Average Daily Rate

\$192.34

- 1.6% from 2022

Revenue per Available Room

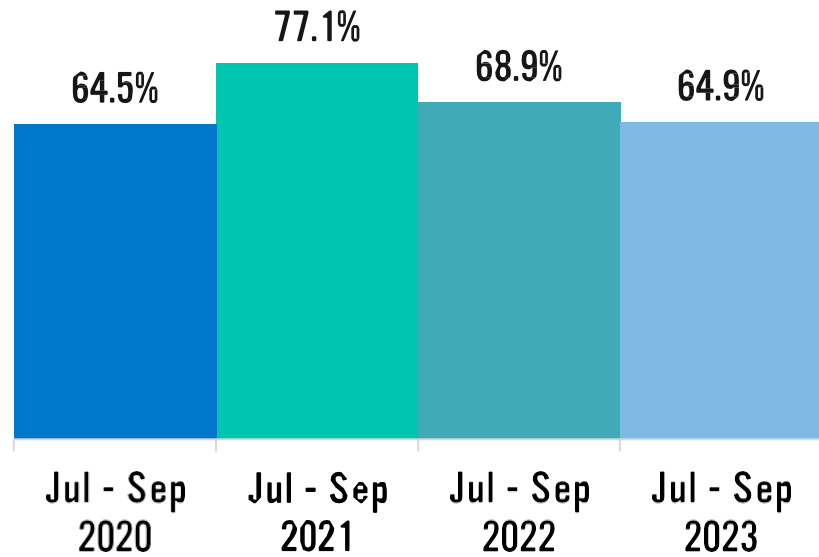
\$124.89

- 7.3% from 2022

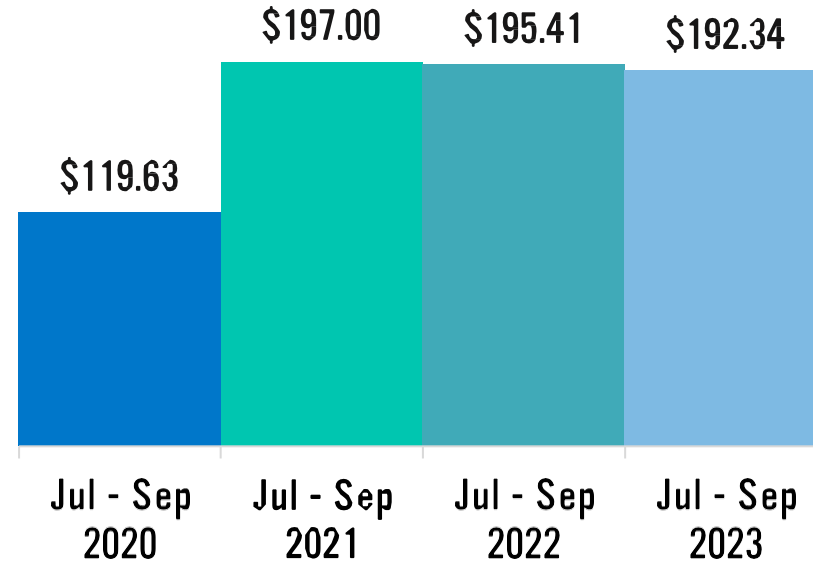
¹Total units available is calculated using Smith Travel Research and the Department of Business and Professional Regulation's estimate of vacation rental units.

ACCOMODATION METRICS - 4 YEAR TREND

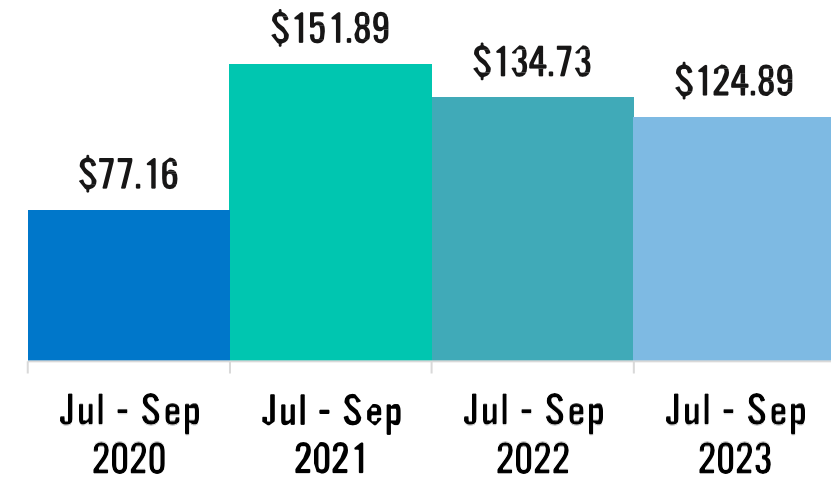
Occupancy



ADR

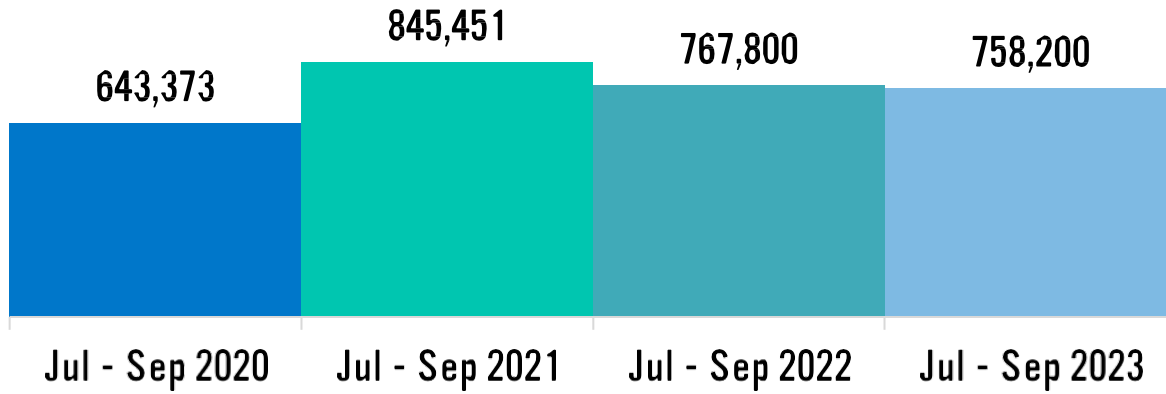


RevPAR

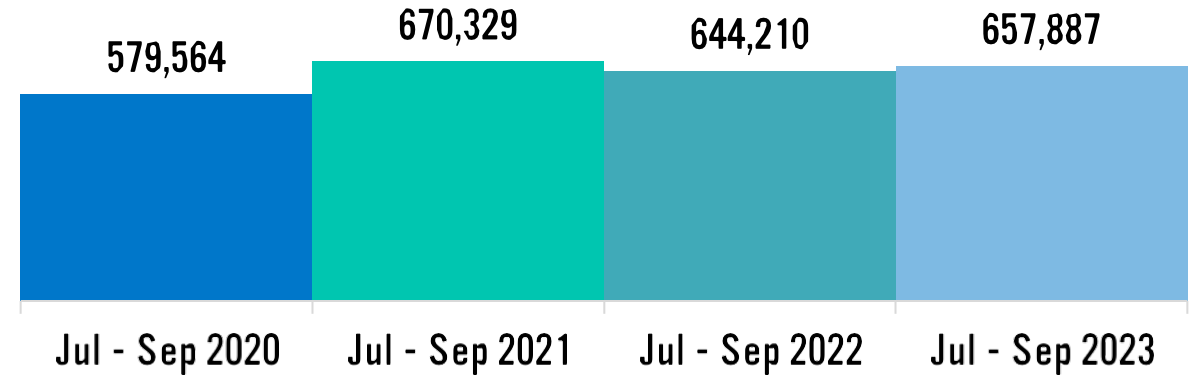


IMPACT OF TOURISM METRICS - 4 YEAR TREND

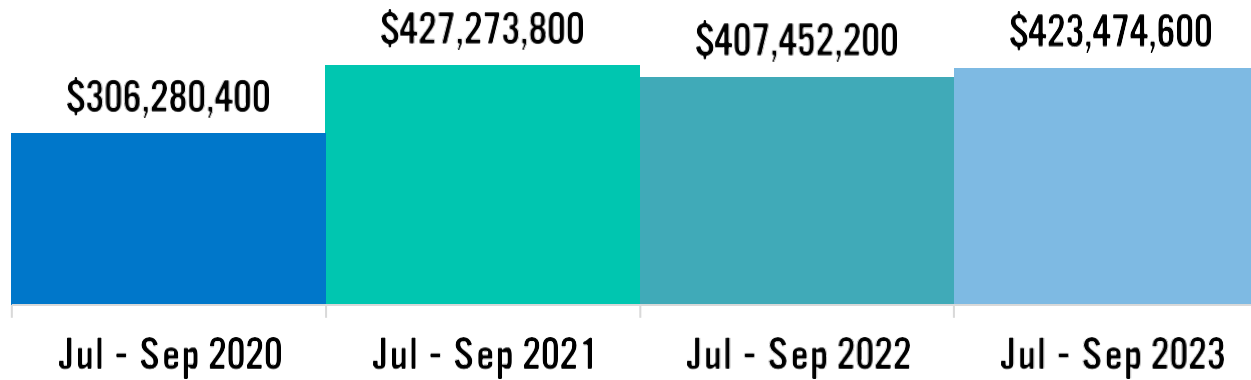
Visitors



Room Nights



Direct Spending



VISITOR JOURNEY: PRE-VISIT



TRIP PLANNING CYCLE

- » Trips to Pensacola have slightly shorter planning windows, as over **half** of visitors planned their trip to the Pensacola area **a month or less in advance** (53% in 2022)
- » Average trip planning cycle began **57 days** before the trip (57 days in 2022)



TOP TRIP PLANNING SOURCES¹



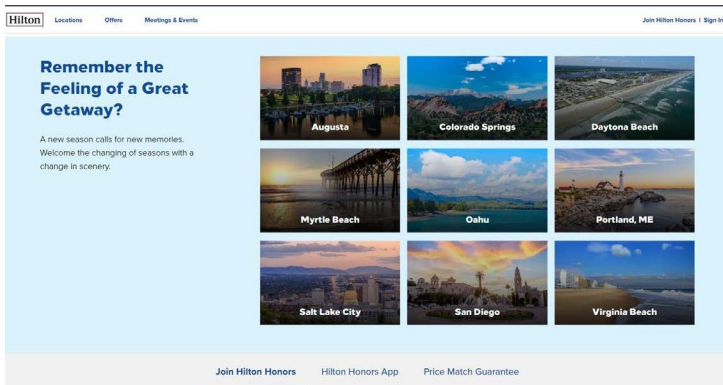
69% Search sites (Google, etc.)
(67% in 2022)



37% Friends/family
(37% in 2022)



29% Vacation rental websites
(31% in 2022)



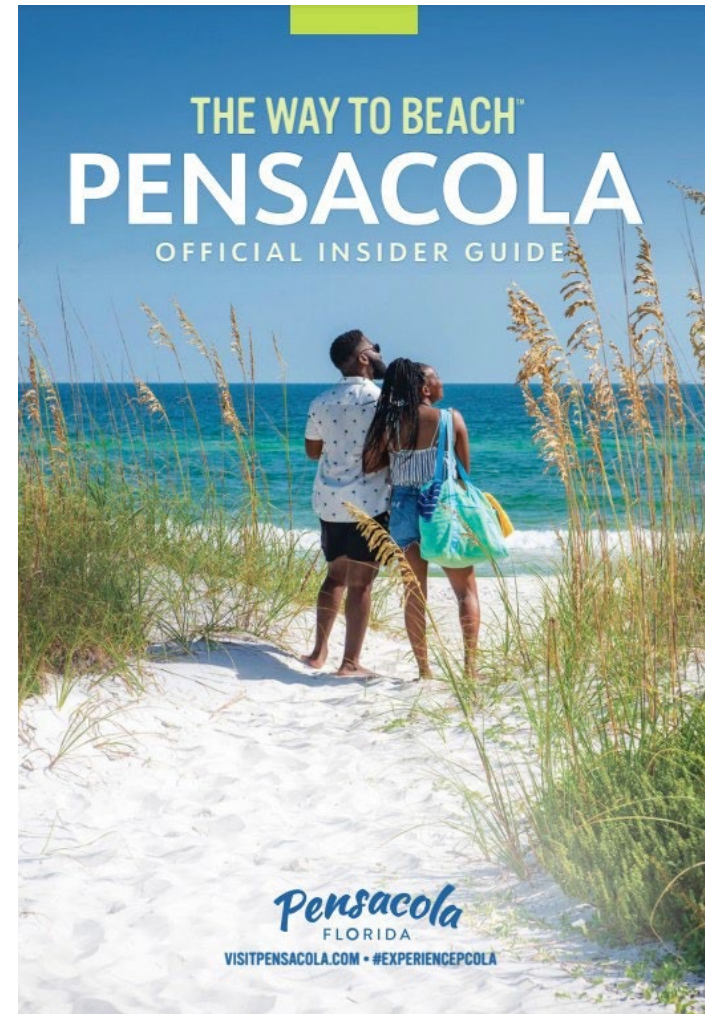
27% Hotel websites/apps
(34% in 2022)



21% Airline websites/apps
(27% in 2022)

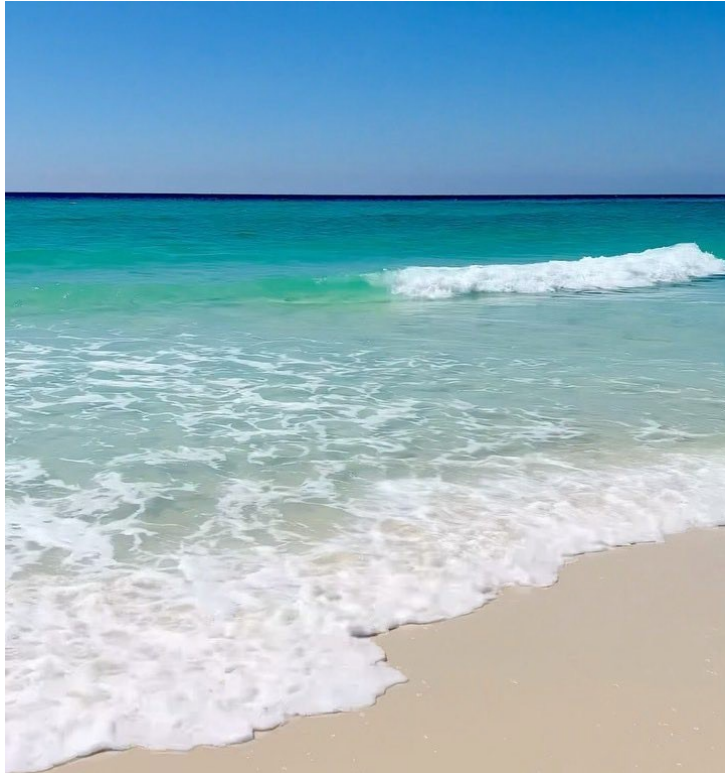
VISITOR GUIDE

- » **21%** of visitors requested or viewed the Pensacola Visitors Guide (**26% in 2022**)
- » Most visitors who use the Visitor Guide viewed it **online**



TOP REASONS FOR VISITING¹

Compared to last year, more visitors came to the area for **family time together (+5% points)**



50% Beach
(46% in 2022)



39% Relax and unwind
(43% in 2022)



25% Visit friends/relatives
(23% in 2022)

PRE-TRIP RECALL OF ADVERTISING

- » **22%** of visitors have recalled advertising about the Pensacola area (**19% in 2022**)
- » This information influenced **11%** of all visitors to visit the Pensacola area (**12% in 2022**)
- » Please note that these figures are topline and solely relies on the memory of each visitor even though various other factors go into the influence of advertising



TOP SOURCES OF ADVERTISING RECALL¹

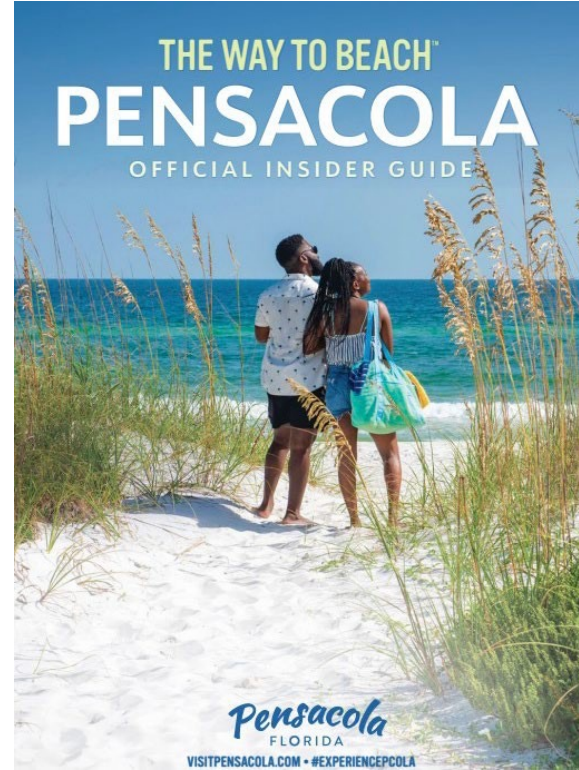
Base: 22% of visitors who recalled advertising



33% Personal social media
(28% in 2022)



26% Television
(27% in 2022)



20% VisitPensacola.com
(16% in 2022)



18% Visit Pensacola social media
(18% in 2022)

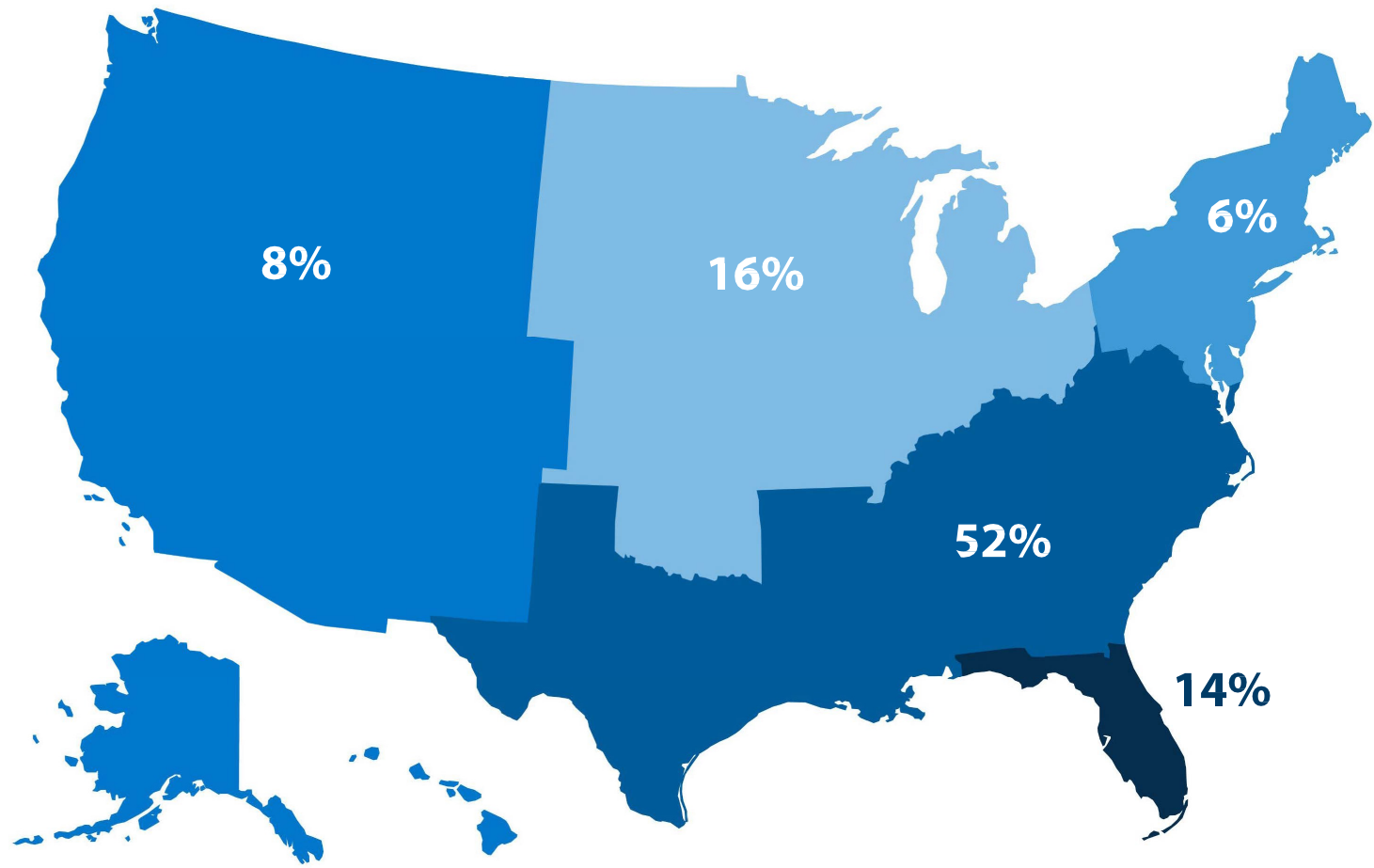
¹ Multiple responses permitted.

VISITOR JOURNEY: TRAVEL PARTY PROFILE



REGIONS OF ORIGIN

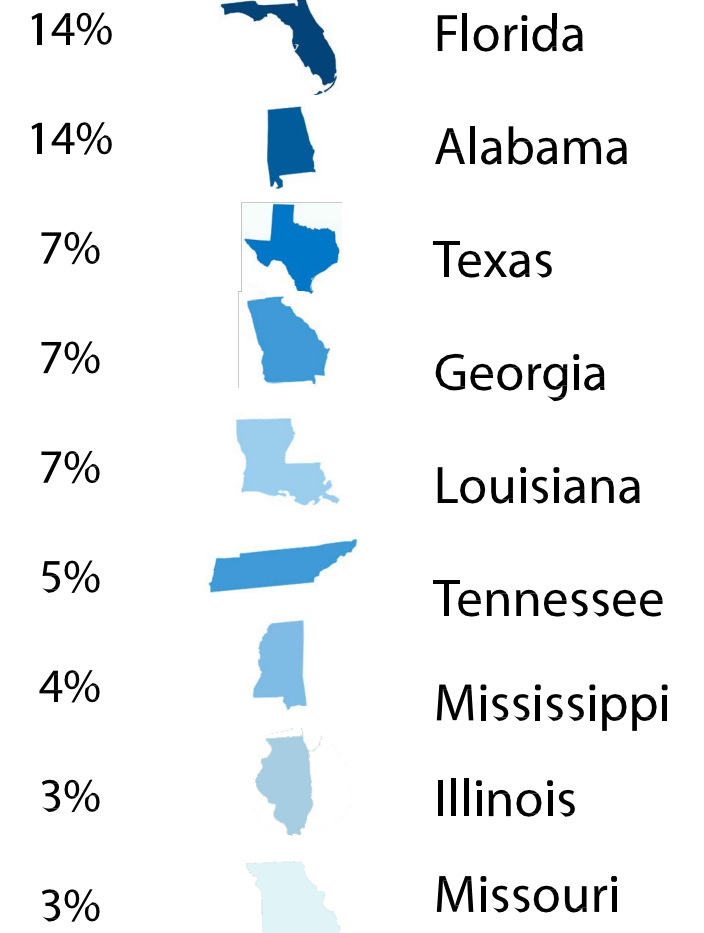
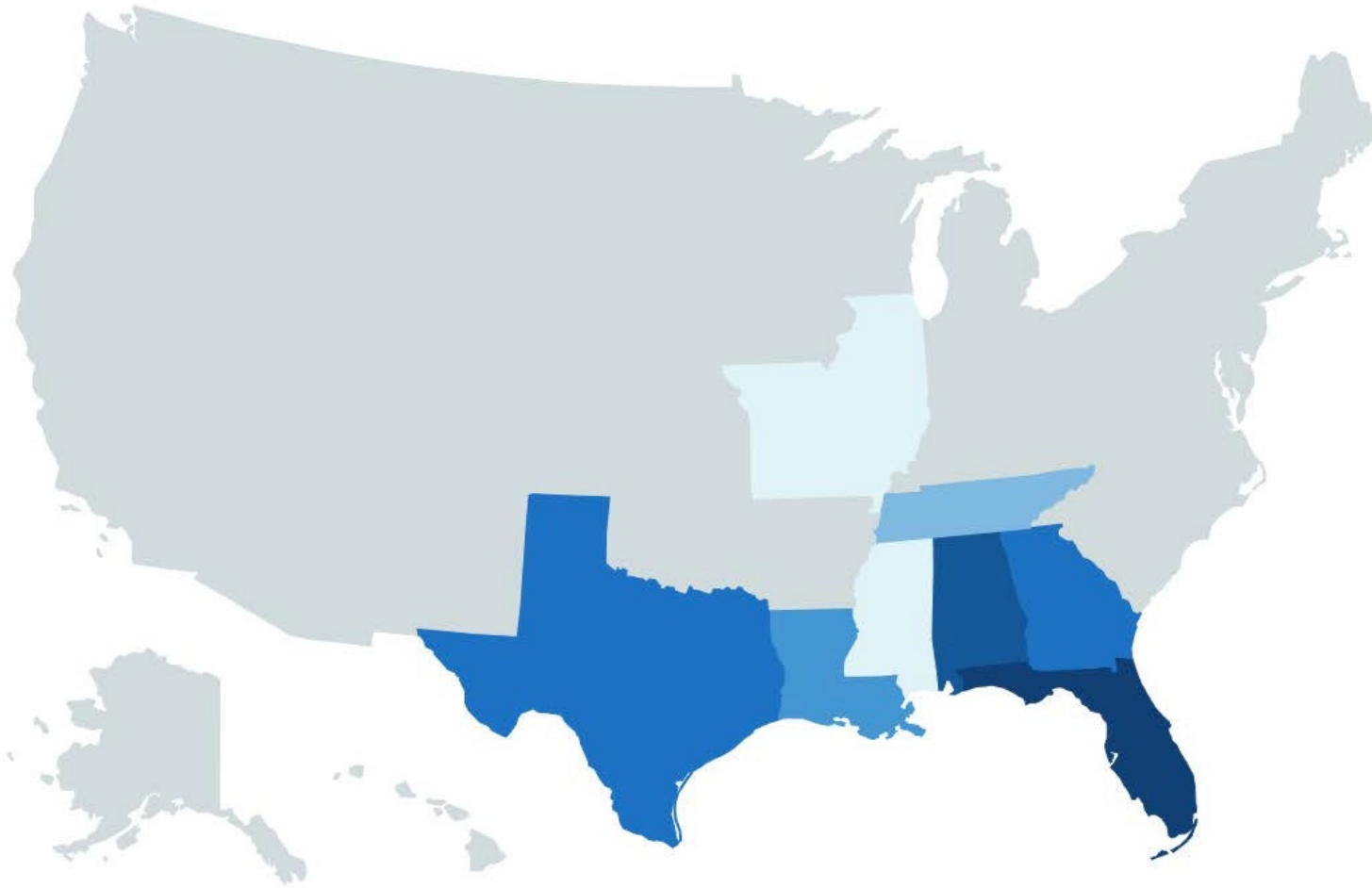
The southeast including Florida account for 2 in 3 visitors



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

TOP STATES OF ORIGIN

Over 3 in 5 visitors reside in 9 states



TOP MARKETS OF ORIGIN



15% Mobile¹
(11% in 2022)



5% Atlanta
(5% in 2022)



4% New Orleans
(3% in 2022)



3% Nashville
(3% in 2022)



3% Dallas – Fort Worth
(3% in 2022)



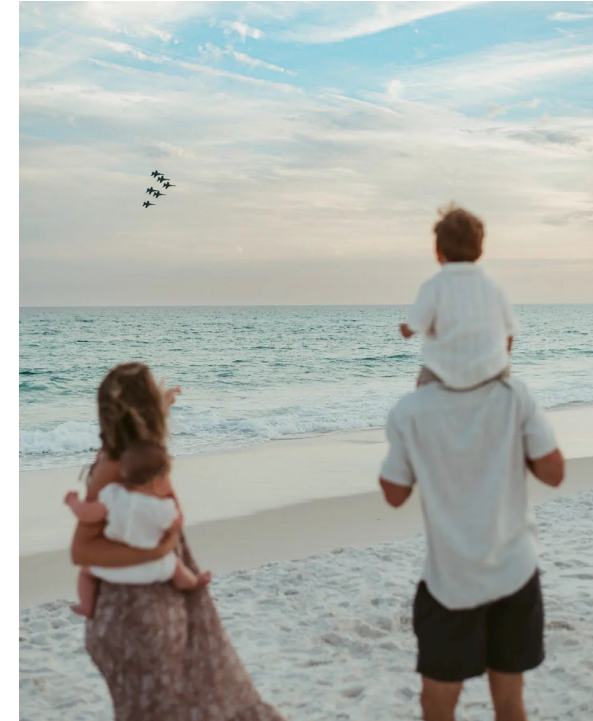
3% Birmingham
(3% in 2022)

TRAVEL PARTIES

- » The typical visitor traveled in a party composed of **3.2** people (3.3 in 2022)



- » **37%** traveled with at least one person under the age of 20 (40% in 2022)



VISITOR PROFILE

- » The typical Pensacola area Visitor:
 - » Is **45** years old (44 in 2022)
 - » Has a household income of **\$86,600** per year (\$92,300 in 2022)
 - » Female¹ **59%** (57% in 2022)



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

NEW & RETURNING VISITORS

- » Nearly **3 in 10 visitors** were first time visitors to Pensacola area (**30% in 2022**)
- » **21%** of visitors were loyalists, having visited over 10 times (**19% in 2022**)



VISITOR JOURNEY: TRIP EXPERIENCE



TRANSPORTATION

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



OVERNIGHT VISITORS

- » **Over 1 in 3** visitors stayed overnight in a **hotel, motel, or resort** (40% in 2022)
- » Typical visitors spent **4.3** nights in the Pensacola area (4.4 in 2022)



TOP ACCOMMODATIONS



35% Hotel/Motel/Resort
(40% in 2022)



23% Vacation rental home*
(22% in 2022)



19% Day tripper
(16% in 2022)



13% Friends/family home
(13% in 2022)

*Includes Airbnb, VRBO, HomeAway, etc.

TOP ACTIVITIES DURING VISIT¹



80% Restaurants
(82% in 2022)



79% Beach
(75% in 2022)



76% Relax and unwind
(77% in 2022)

¹ Multiple responses permitted.

TRAVEL PARTY SPENDING

- » Travel parties spent **\$350** per day and **\$1,506** during their trip (\$351 per day and \$1,543 per trip in 2022)



VISITOR JOURNEY: POST-TRIP



VISITOR SATISFACTION

- » **98%** of visitors were **satisfied** with their trip to the Pensacola area (98% in 2022) – **74%** were **very satisfied** (76% in 2022)
- » **93%** of visitors would **recommend** the area to others (91% in 2022)
- » **98%** of visitors would **return** to the Pensacola area (97% in 2022) – **70%** would **definitely return** (74% in 2022)



SATISFACTION RATINGS

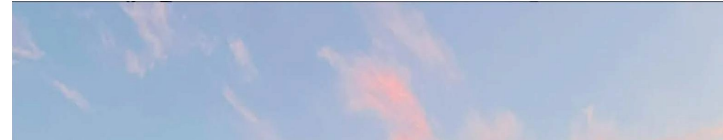
- » Nearly **7 in 10** visitors expressed that **lodging** (63% in 2022), **restaurants** (61% in 2022), and **customer service** (58% in 2022) exceeded expectations
- » Over **half** of visitors expressed **value for their money** (47% in 2022), exceeded expectations



AREA DESCRIPTIONS*



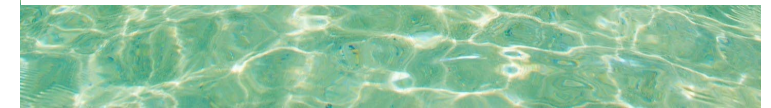
"A vibe. Best beaches you're ever going to see + great nightlife"



"Picture perfect and serene landscape. Fall asleep to the nature's chorus."



"Great. Beautiful beaches. Amazing Blue Angel's. Great shopping. Very nice, friendly people."



*Open-ended responses. Multiple responses permitted.

QUESTIONS?

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