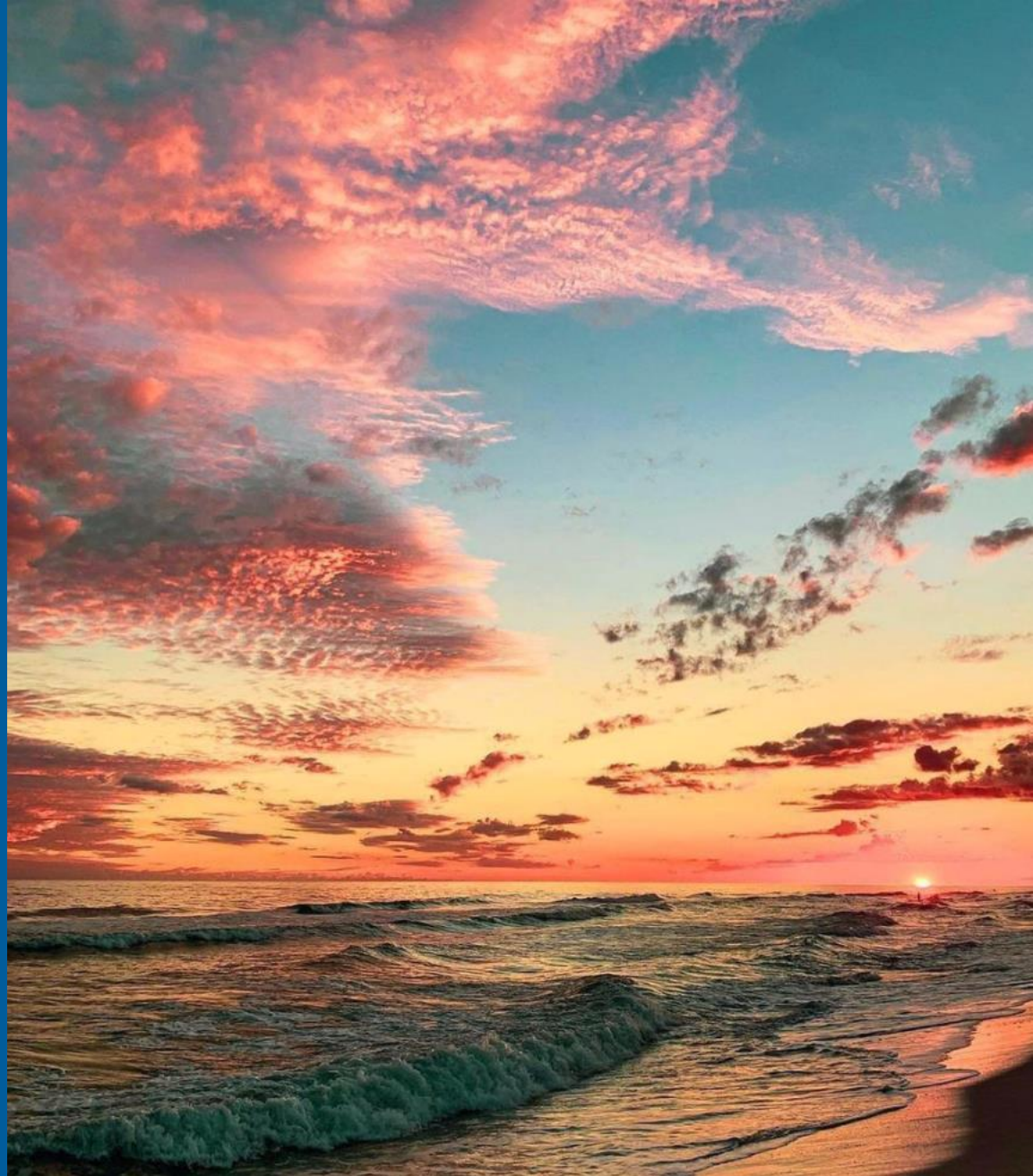


# VISIT PENSACOLA

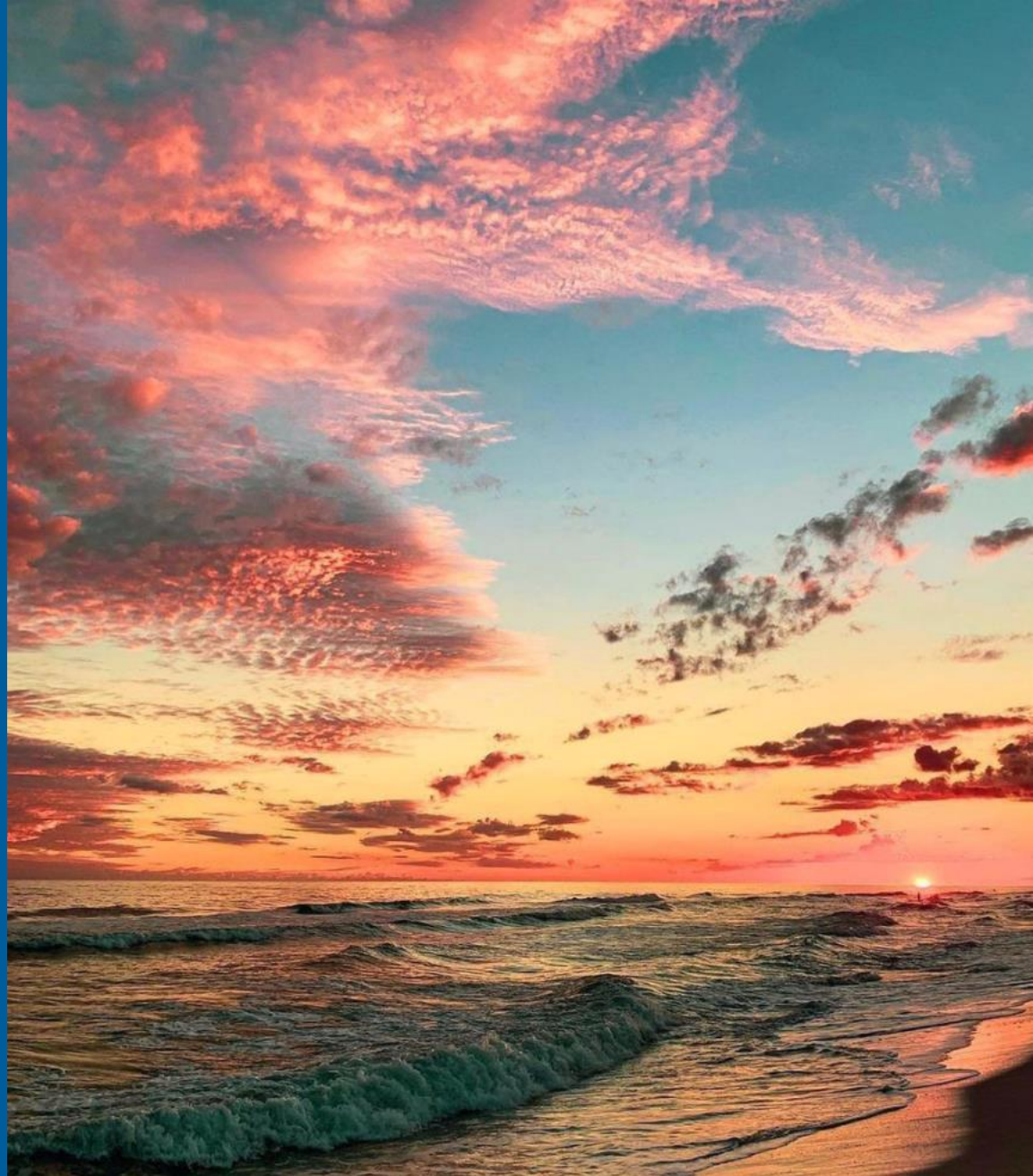
Visitor Tracking Study  
October – December 2024



# STUDY OBJECTIVES: VISITOR JOURNEY



# EXECUTIVE SUMMARY





# QUARTERLY SNAPSHOT

OCTOBER – DECEMBER 2024



517,300

TOTAL  
VISITORS



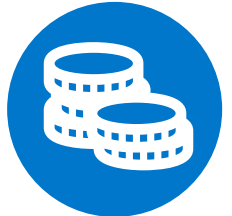
521,700

ROOM  
NIGHTS



\$273,472,600

DIRECT  
SPENDING



\$4,244,228

TOURISM  
DEVELOPMENT TAX

vs. 2023

0%

↑ 2.3%

↓ 1.0%

↓ 0.2%

## Compared to October – December 2023, in October – December 2024...

- » **Occupancy** was up **+3.2%** and **ADR** was up **+1.8%**, resulting in a **RevPAR** that was up **+5.0%**.
- » A slight decrease in **available units (-0.8%)** resulted in a slight decrease in **TDT (-0.2%)**.
- » An increase in **occupancy (+3.2%)** and a slight decrease in **available units (-0.8%)** resulted in about **the same number of visitors**.
- » **Spending** was down **-1.0%** due to a shorter length of stay despite about the same number of visitors.
- » More visitors used **VisitPensacola.com to plan their trip (+5% points)**.
- » More visitors **recalled advertising** about the Pensacola area **(+6% points)** and of those visitors who **recalled advertising**, they were more likely to see it on a **weather app (+12% points)**, **traveler reviews/blogs (+9% points)**, **VisitPensacola.com (+6% points)**, and **personal social media (+6% points)**.

# VISITOR JOURNEY: ECONOMIC IMPACT



# TOURISM SNAPSHOT: METRICS

	October – December 2023	October – December 2024	% Δ
Occupancy <sup>1</sup>	49.9%	51.5%	+3.2%
ADR <sup>1</sup>	\$126.76	\$129.03	+1.8%
RevPAR	\$63.31	\$66.50	+5.0%
Room Nights	509,800	521,700	+2.3%
TDT <sup>2</sup>	\$4,254,636	\$4,244,228	-0.2%

	October – December 2023	October – December 2024	% Δ
Visitors <sup>3</sup>	517,100	517,300	-
Direct Spending	\$276,355,900	\$273,472,600	-1.0%

<sup>1</sup> Sources: Key Data and Smith Travel Research.

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

<sup>3</sup> An increase in occupancy and a slight decrease in available units resulted in about the same number of visitors.

# VISITOR JOURNEY: PRE-VISIT



# TRIP PLANNING CYCLE

- » Visitors to Pensacola have short trip planning windows, as **over half** of visitors planned their trip to the Pensacola area **a month or less in advance** (58% in 2023)
- » Average trip planning cycle began **57 days** before the trip (54 days in 2023)





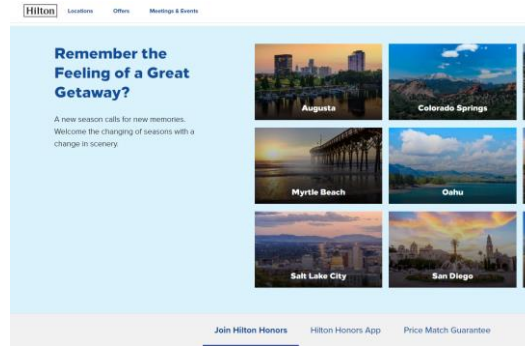
# TOP TRIP PLANNING SOURCES<sup>1</sup>



**69%** Search sites  
(Google, etc.)  
(71% in 2023)



**40%** Friends/family  
(37% in 2023)



**26%** Hotel websites/apps  
(21% in 2023)



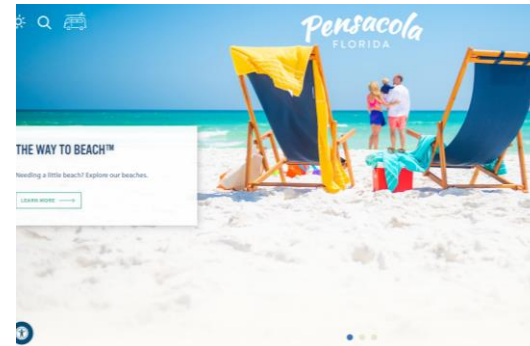
**21%** Personal social media  
(17% in 2023)



**19%** Vacation rental  
websites  
(18% in 2023)



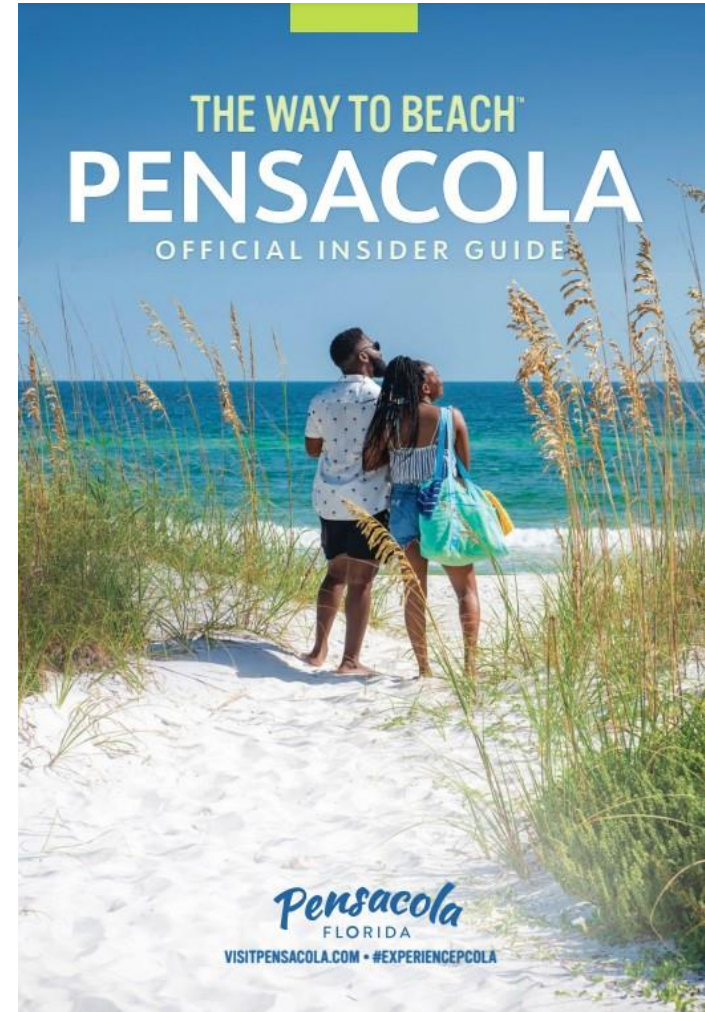
**19%** Airline websites/apps  
(20% in 2023)



**18%** VisitPensacola.com  
(13% in 2023)

# VISITOR GUIDE

- » **18%** visitors requested or viewed the Pensacola Visitors Guide (**15% in 2023**)
- » Most visitors who use the Pensacola Visitor Guide viewed it **online**





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



**28%** Beach  
(23% in 2023)



**28%** Relax and unwind  
(26% in 2023)



**23%** Visit friends/relatives  
(26% in 2023)



**15%** Special events  
(17% in 2023)



**14%** Special occasion  
(14% in 2023)



**13%** Family time  
(13% in 2023)



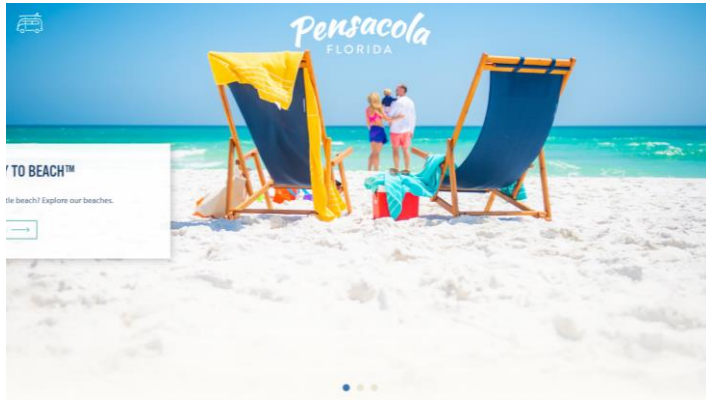
# PRE-TRIP RECALL OF ADVERTISING

- » **32%** of visitors have recently noticed advertising about the Pensacola area (**26%** in 2023)
- » This information influenced **17%** of all visitors to visit the Pensacola area (**10%** in 2023)



# SOURCES OF ADVERTISING RECALL<sup>1</sup>

Base: 32% of visitors who recalled advertising<sup>2</sup>



**29%** VisitPensacola.com  
(23% in 2023)



**28%** Personal social media  
(22% in 2023)



**26%** Television  
(27% in 2023)



**16%** Weather app  
(4% in 2023)



**12%** Traveler reviews/blogs  
(3% in 2023)

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

<sup>2</sup> Additional top sources of advertising recall:  
Online article (11%), Visit Pensacola social media (11%), Radio (10%), and Billboard (9%).

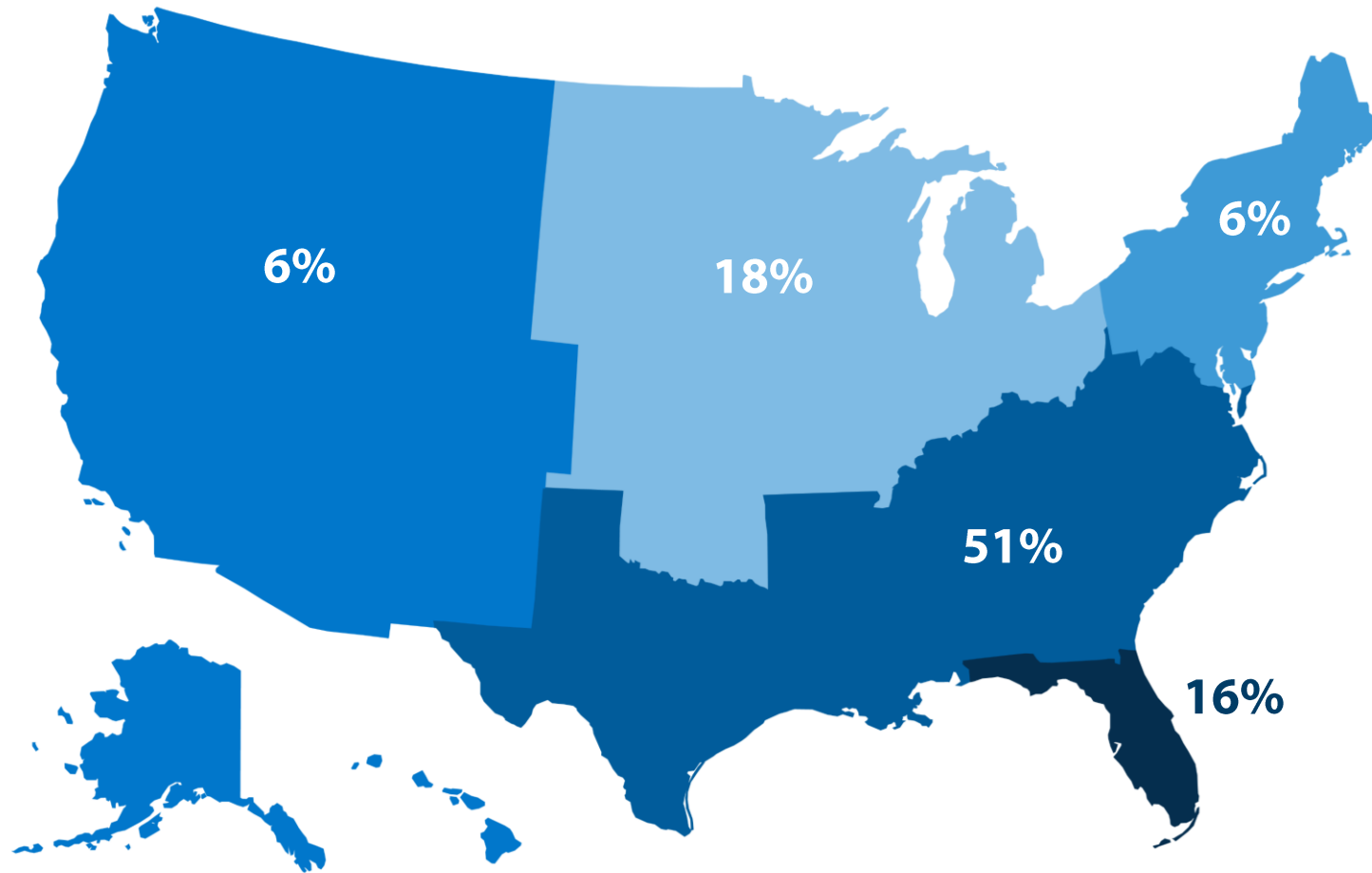


# VISITOR JOURNEY: TRAVEL PARTY PROFILE



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

The **southeast** including Florida account for **2 in 3** visitors

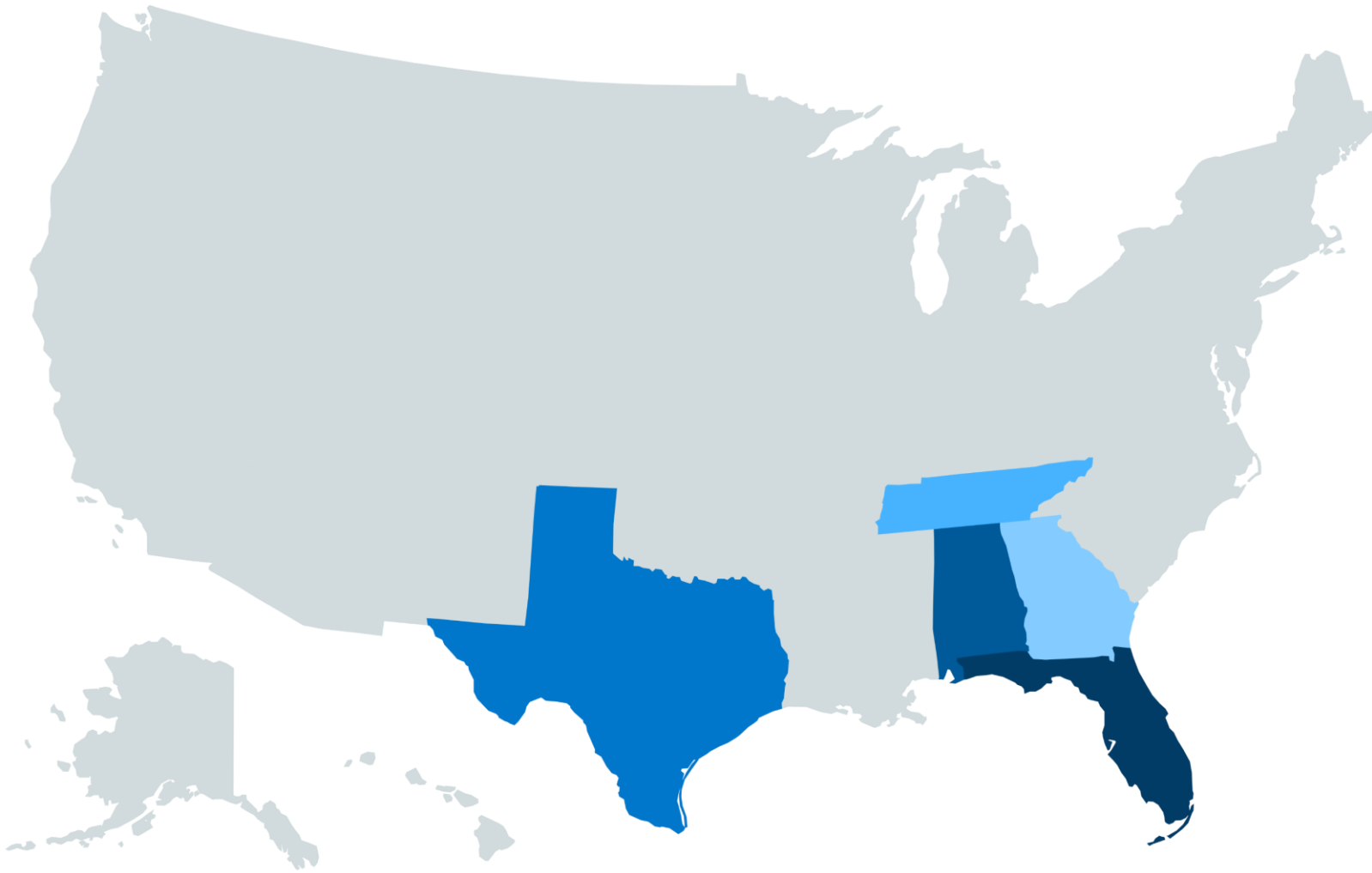


**3%** of visitors traveled to Pensacola from outside of the U.S.\*

\*Top international markets include the United Kingdom, Ontario, France, and British Columbia.

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

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



**Half** of visitors reside in **5 states**

**16%** Florida

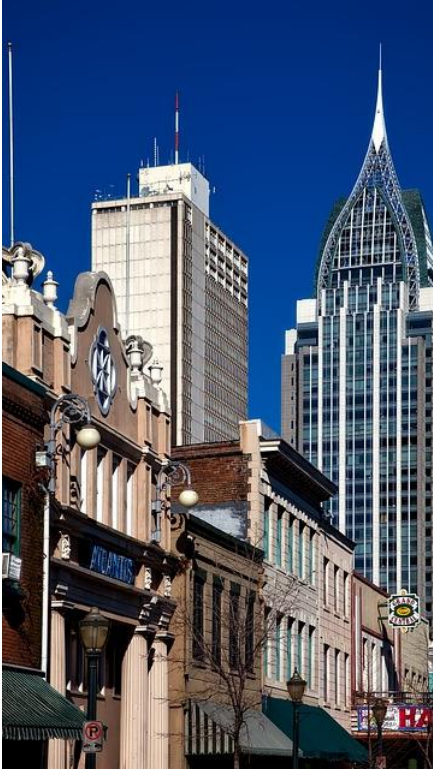
**15%** Alabama

**7%** Texas

**6%** Tennessee

**6%** Georgia

# TOP MARKETS OF ORIGIN<sup>1</sup>



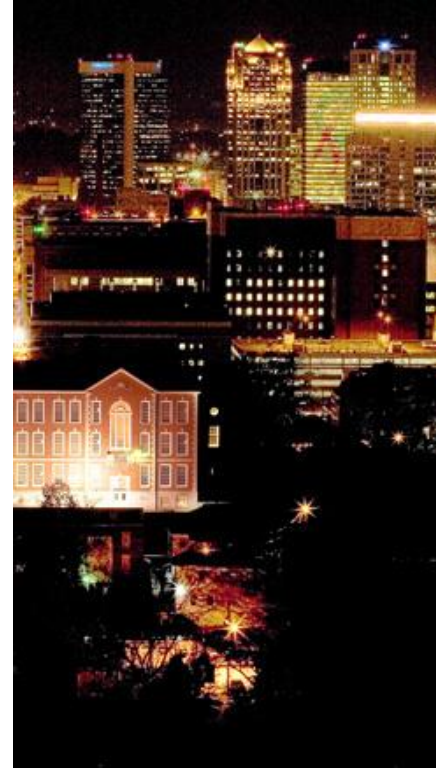
**15%** Mobile<sup>2</sup>  
(21% in 2023)



**4%** Atlanta  
(4% in 2023)



**3%** Nashville  
(3% in 2023)



**3%** Birmingham  
(2% in 2023)



**3%** New Orleans  
(2% in 2023)

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

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



# TRAVEL PARTIES

- » The typical visitor traveled in a party composed of **2.6** people (2.8 in 2023)



- » **41%** traveled with at least one person under the age of 20 (41% in 2023)





# VISITOR PROFILE

- » The typical Pensacola area visitor:
  - » Is **46** years old (45 in 2023)
  - » Has a household income of **\$85,900** per year (\$79,800 in 2023)
  - » Female<sup>1</sup> **62%** (63% in 2023)



<sup>1</sup>May be influenced by visitor's willingness to complete a survey.

# NEW & RETURNING VISITORS

- » **1 in 4** visitors said this was their **first time visiting** the Pensacola area (22% in 2023)
- » **3 in 10** visitors were loyal to Pensacola, having visited over 10 times (33% in 2023)



# VISITOR JOURNEY: TRIP EXPERIENCE



# TRANSPORTATION

- » **84%** of visitors **drove** to the Pensacola area for their trip (84% in 2023)
- » **15%** of **all** visitors flew to the Pensacola area through the **Pensacola International Airport** (14% in 2023)





# OVERNIGHT VISITORS

- » **1 in 3** visitors stayed overnight in a **hotel, motel, or resort** (30% in 2023)
- » Typical visitors spent **4.5** nights in the Pensacola area (4.6 in 2023)





# TOP ACCOMMODATIONS



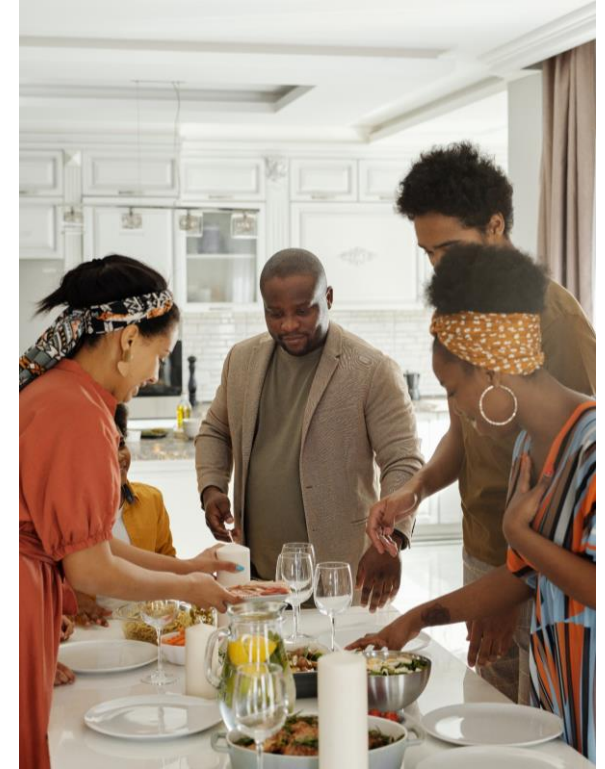
**33%** Hotel/Motel/Resort  
(30% in 2023)



**26%** Day tripper  
(30% in 2023)



**19%** Vacation rental home\*  
(15% in 2023)



**17%** Friends/family home  
(18% in 2023)



# TOP ACTIVITIES DURING VISIT<sup>1</sup>



**83%** Restaurants  
(80% in 2023)



**72%** Relax and unwind  
(70% in 2023)



**65%** Beach  
(60% in 2023)



**42%** Shopping  
(38% in 2023)



**37%** Family time  
(36% in 2023)



**34%** Art galleries,  
museums, etc.  
(31% in 2023)



**33%** Visit friends/relatives  
(36% in 2023)



**29%** Attractions  
(25% in 2023)



**29%** Bars/nightclubs  
(26% in 2023)



**26%** Special events  
(28% in 2023)

# TRAVEL PARTY SPENDING

- » Travel parties spent **\$294** per day and **\$1,326** during their trip (\$291 per day and \$1,339 per trip in 2023)



# VISITOR JOURNEY: POST-TRIP





# VISITOR SATISFACTION

- » **99%** of visitors were **satisfied** with their trip to the Pensacola area (99% in 2023) – **77%** were **very satisfied** (76% in 2023)
- » **96%** of visitors would **recommend** the area to others (94% in 2023)
- » **99%** of visitors would **return** to the Pensacola area (99% in 2023) – **74%** would **definitely return** (72% in 2023)





# SATISFACTION RATINGS

- » About **3 in 5** visitors expressed that **customer service** (67% in 2023), **restaurants** (65% in 2023), and **lodging** (65% in 2023) exceeded expectations
- » Nearly **half** of visitors expressed **value for their money** (53% in 2023) exceeded expectations



# AREA DESCRIPTIONS\*



*"We love spending our winter in Pensacola. It's rarely too hot or too cold. So many activities going on. Really good restaurants and the beach is great."*



*"I understand why so many people suggested Pensacola to me. It's a beautiful place and the people are quite nice."*



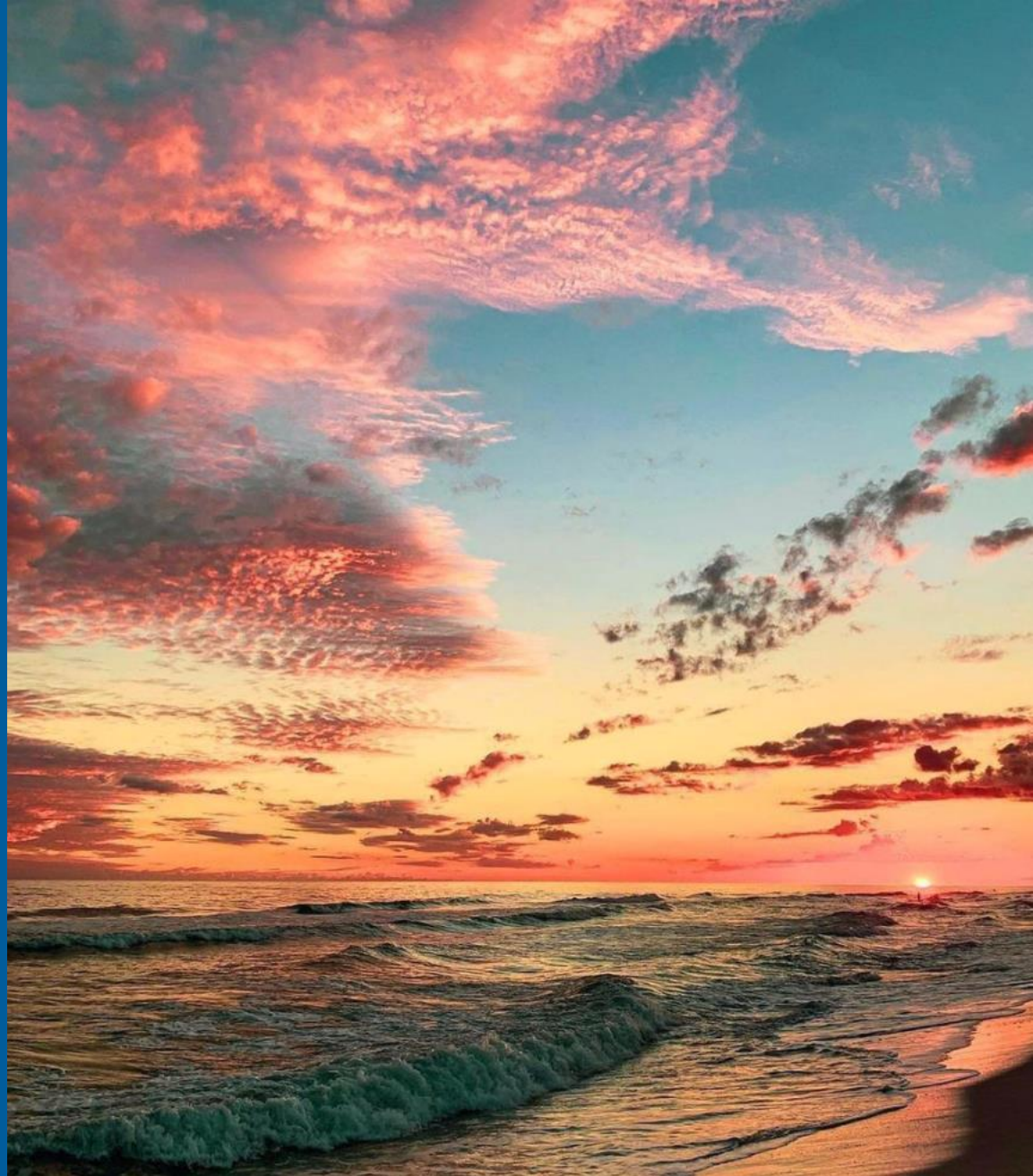
*"It's fun and relaxing, even in cooler weather. The sand is so soft and the ocean is beautiful. There are really good restaurants too. And the aviation museum was amazing."*



\*Open-ended responses. Multiple responses permitted.



# DETAILED FINDINGS



# VISITOR JOURNEY: ECONOMIC IMPACT





# TOURISM SNAPSHOT: METRICS

	October – December 2023	October – December 2024	% Δ
Occupancy <sup>1</sup>	49.9%	51.5%	+3.2%
ADR <sup>1</sup>	\$126.76	\$129.03	+1.8%
RevPAR	\$63.31	\$66.50	+5.0%
Room Nights	509,800	521,700	+2.3%
TDT <sup>2</sup>	\$4,254,636	\$4,244,228	-0.2%

	October – December 2023	October – December 2024	% Δ
Visitors <sup>3</sup>	517,100	517,300	-
Direct Spending	\$276,355,900	\$273,472,600	-1.0%

<sup>1</sup> Sources: Key Data and Smith Travel Research.

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

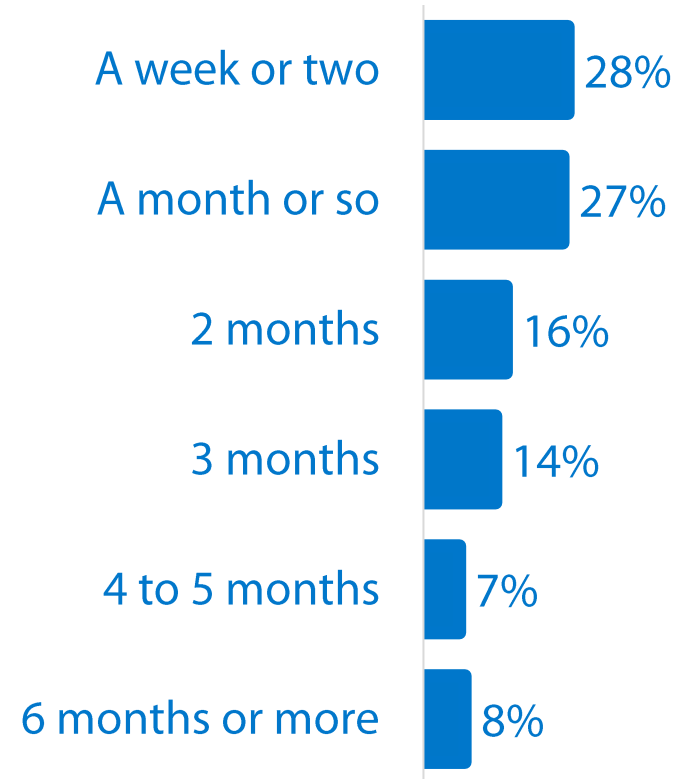
<sup>3</sup> An increase in occupancy and a slight decrease in available units resulted in about the same number of visitors.

# VISITOR JOURNEY: PRE-VISIT



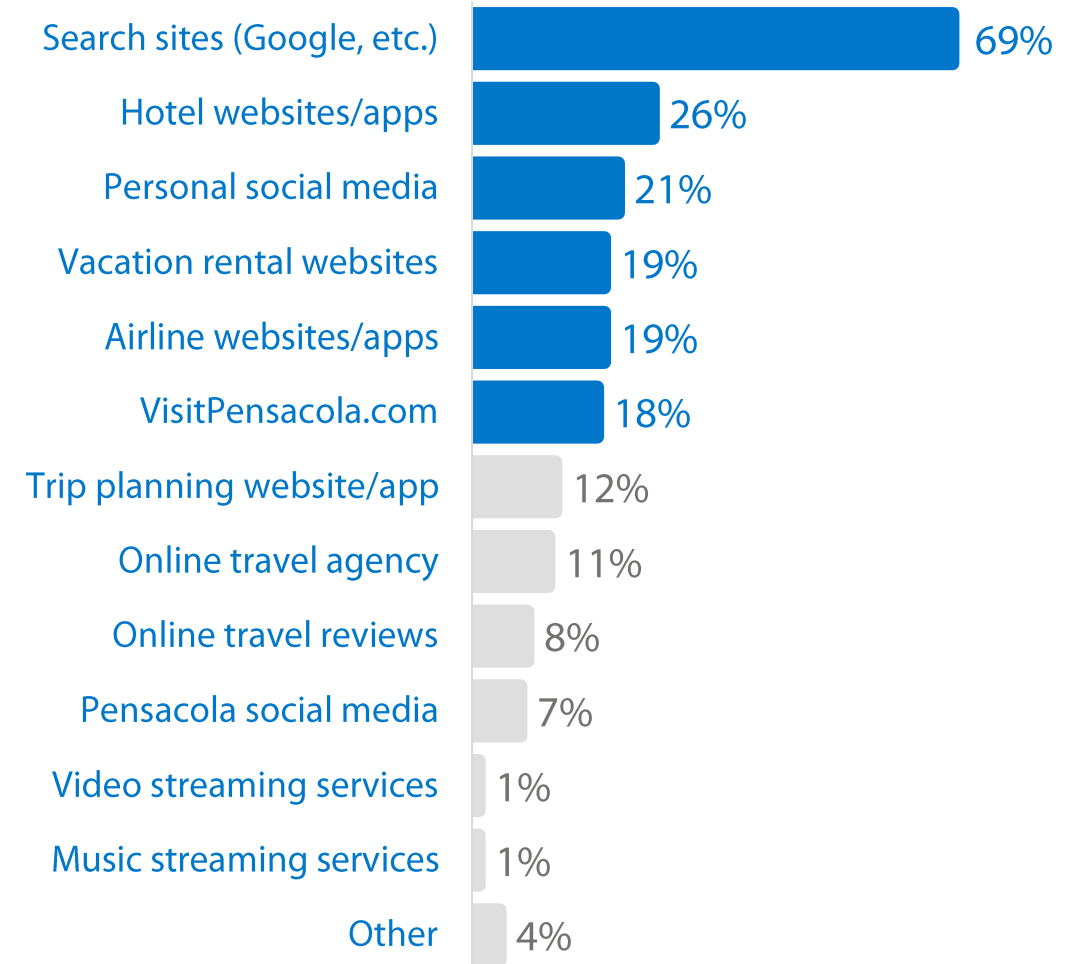
# TRIP PLANNING CYCLE

- » Visitors to Pensacola have short trip planning windows, as **over half** of visitors planned their trip to the Pensacola area **a month or less in advance** (58% in 2023)
- » On the other hand, **3 in 10** visitors planned their trips between **2 and 3 months in advance** (28% in 2023)
- » Average trip planning cycle began **57 days** before the trip (54 days in 2023)



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

- » **Search sites, such as Google**, continue to be the **number one planning source** for trips to the Pensacola area
- » Over **1 in 4** visitors used **hotel websites/apps** and over **1 in 5** visitors used their **personal social media** to plan their trip – all proving to be **good advertising mediums** for the Pensacola area
- » Nearly **1 in 5** visitors used **vacation rental websites** and **airline websites/apps**, and **VisitPensacola.com** to plan their trip
- » Nearly **1 in 5** visitors used **VisitPensacola.com** to plan their trip, **+5% points** from 2023.



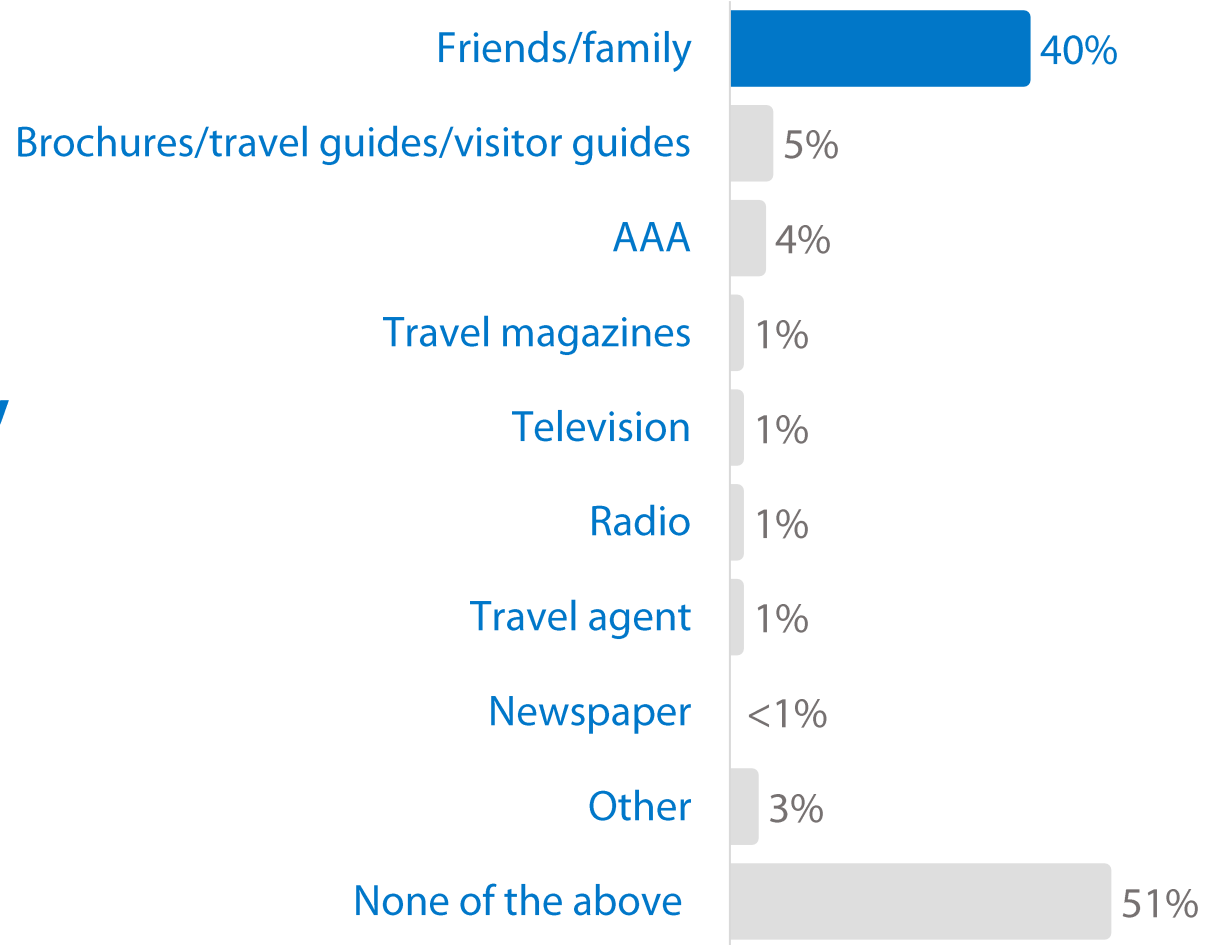
<sup>1</sup>Multiple responses permitted.



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

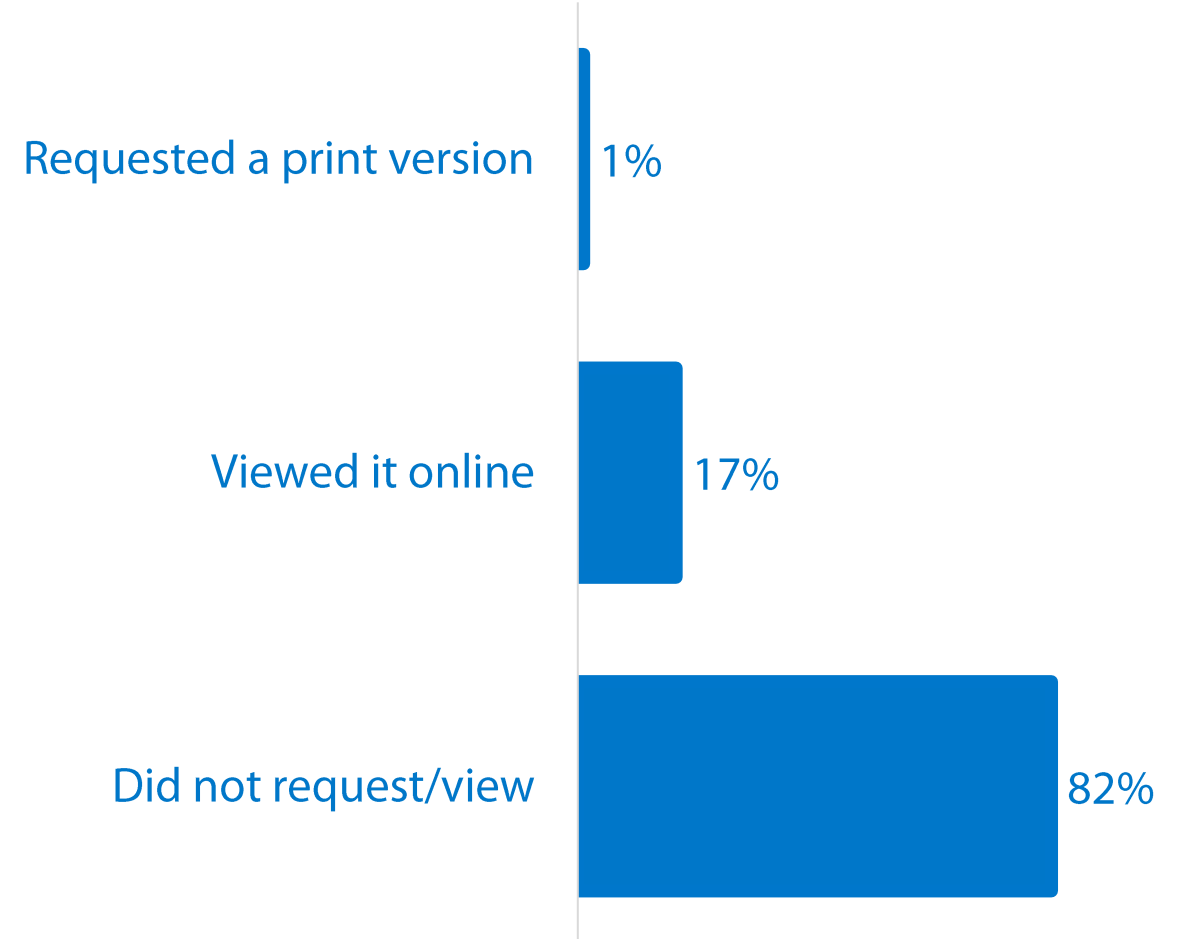
» **2 in 5** visitors planned their trip to the Pensacola area through **friends/family**

» **1 in 20** visitors used **brochures, travel guides, and/or visitor guides**



# VISITOR GUIDE

- » **18%** visitors requested or viewed the Pensacola Visitors Guide (15% in 2023)
- » **Online** viewership of the Pensacola Visitor Guide was significantly greater than print consumption



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

- » Nearly **3 in 10** visitors came to the Pensacola area to visit the **beach** or to **relax and unwind**
- » Nearly **1 in 4** visitors came to **visit friends and relatives**
- » About **1 in 7** visitors came for a **special event, special occasion, or family time**

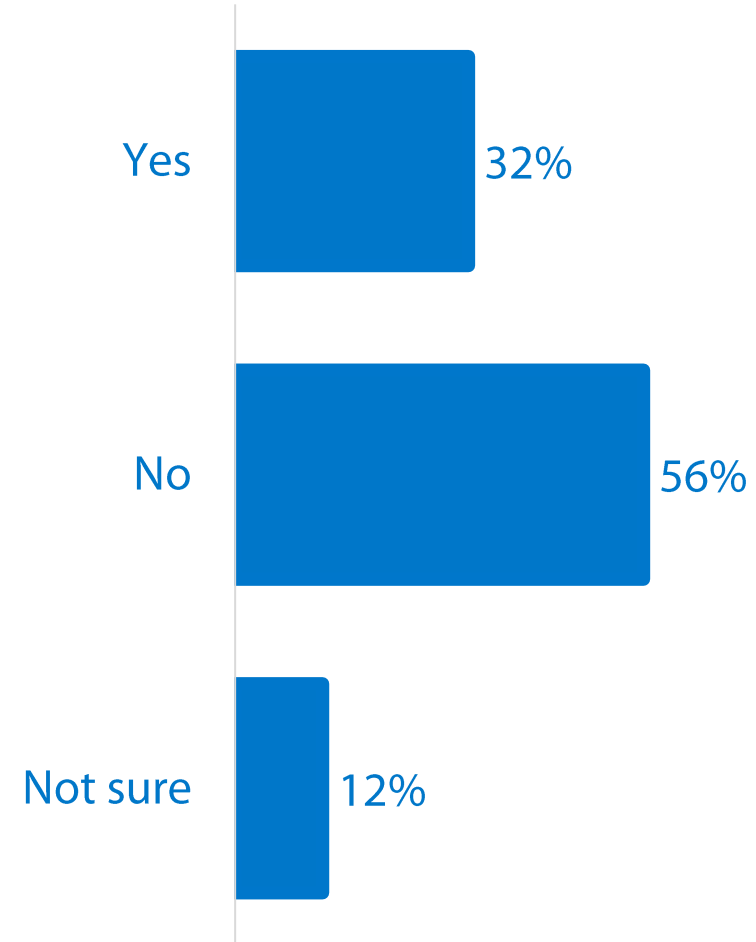


<sup>1</sup> Up to three responses permitted.



# ADVERTISING RECALL

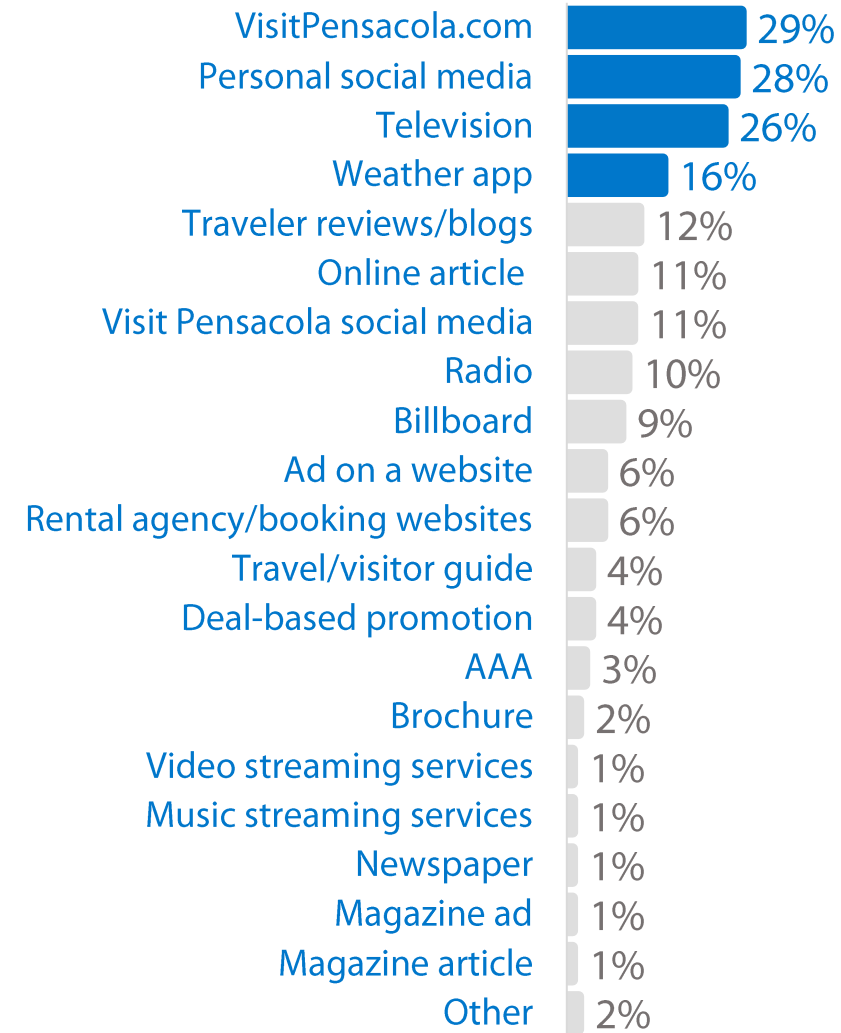
- » Over **3 in 10** visitors recalled advertising about the Pensacola area (**26% in 2023**)
- » This information influenced **17%** of all visitors to visit the Pensacola area (**10% in 2023**)



# ADVERTISING SOURCE<sup>1</sup>

- » Nearly **3 in 10** visitors who recalled advertising for the Pensacola area noticed it on **VisitPensacola.com** or on their **personal social media**
- » Over **1 in 4** visitors noticed advertising on **television**
- » **1 in 6** visitors noticed advertising on a **weather app**

Base: 32% of visitors who recalled advertising



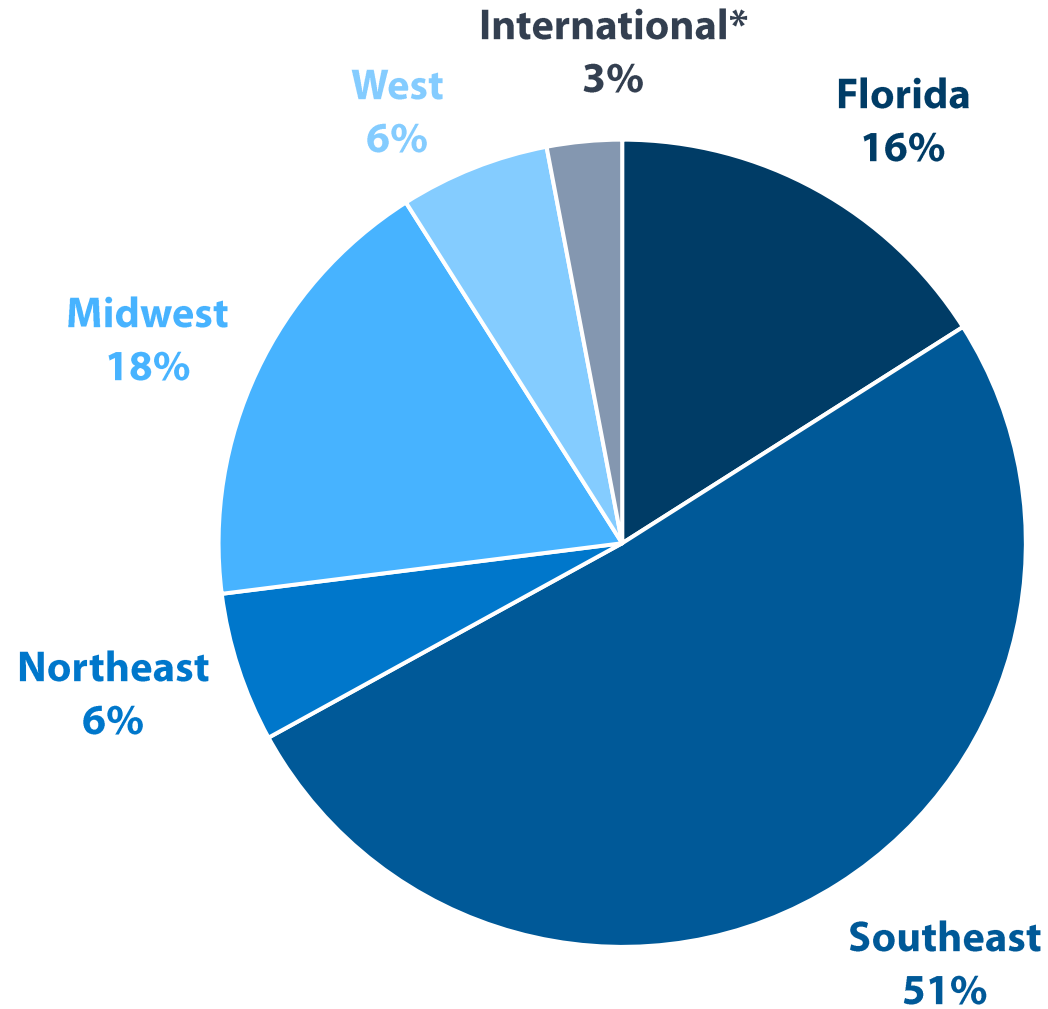
<sup>1</sup> Multiple responses permitted.

# VISITOR JOURNEY: TRAVEL PARTY PROFILE





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

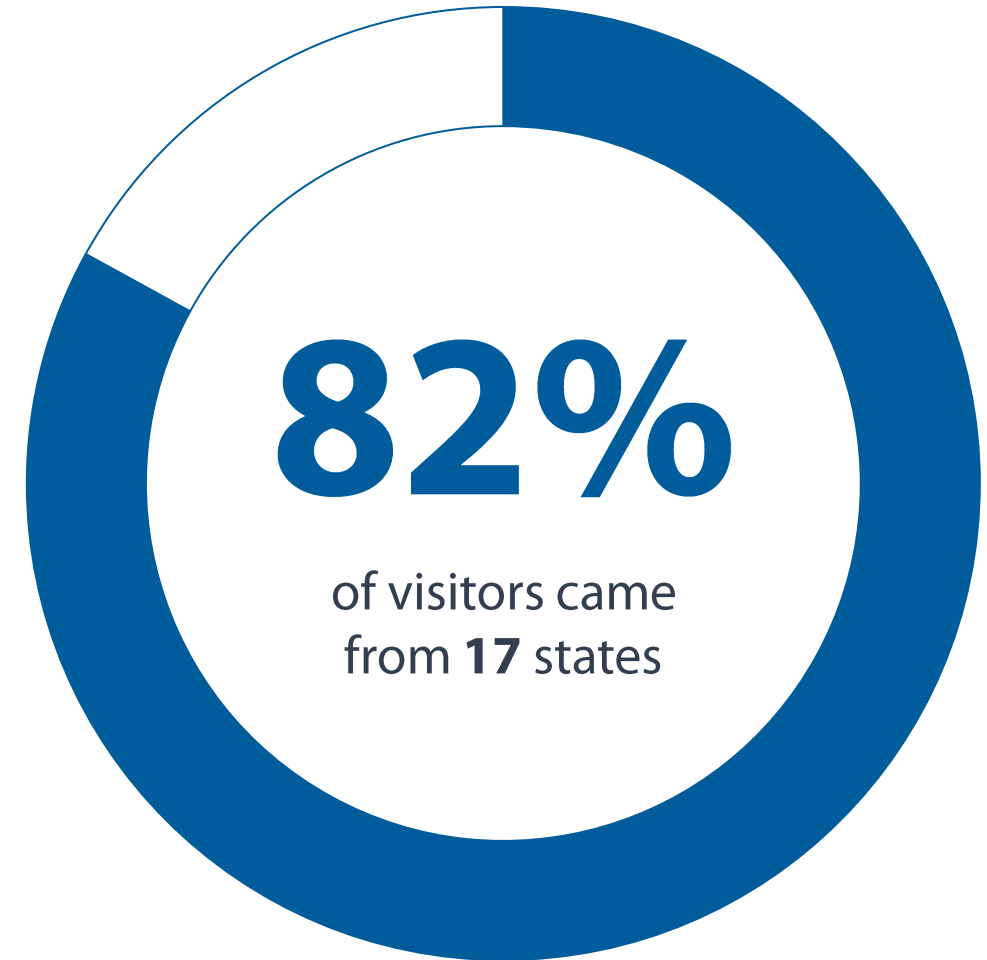


<sup>1</sup> Sources: Zartico and Visitor Tracking Study.

\*Top international markets include the United Kingdom, Ontario, France, and British Columbia.

# STATE OF ORIGIN

State of Origin	2023	2024 <sup>1</sup>
Florida	20%	16%
Alabama	15%	15%
Texas	6%	7%
Tennessee	6%	6%
Georgia	5%	6%
Mississippi	4%	5%
Louisiana	3%	4%
Indiana	2%	3%
Kentucky	2%	3%
Ohio	2%	3%
Arkansas	1%	2%
Missouri	2%	2%
Illinois	2%	2%
North Carolina	3%	2%
Virginia	2%	2%
Michigan	2%	2%
Wisconsin	2%	2%



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

# TOP ORIGIN MARKETS

Markets	2023	2024 <sup>1</sup>
Mobile <sup>1</sup>	21%	15%
Atlanta	4%	4%
Nashville	3%	3%
Birmingham	2%	3%
New Orleans	2%	3%
Dallas – Fort Worth	2%	2%
Houston	2%	2%
Orlando – Daytona Beach – Melbourne	1%	2%
Montgomery	1%	2%

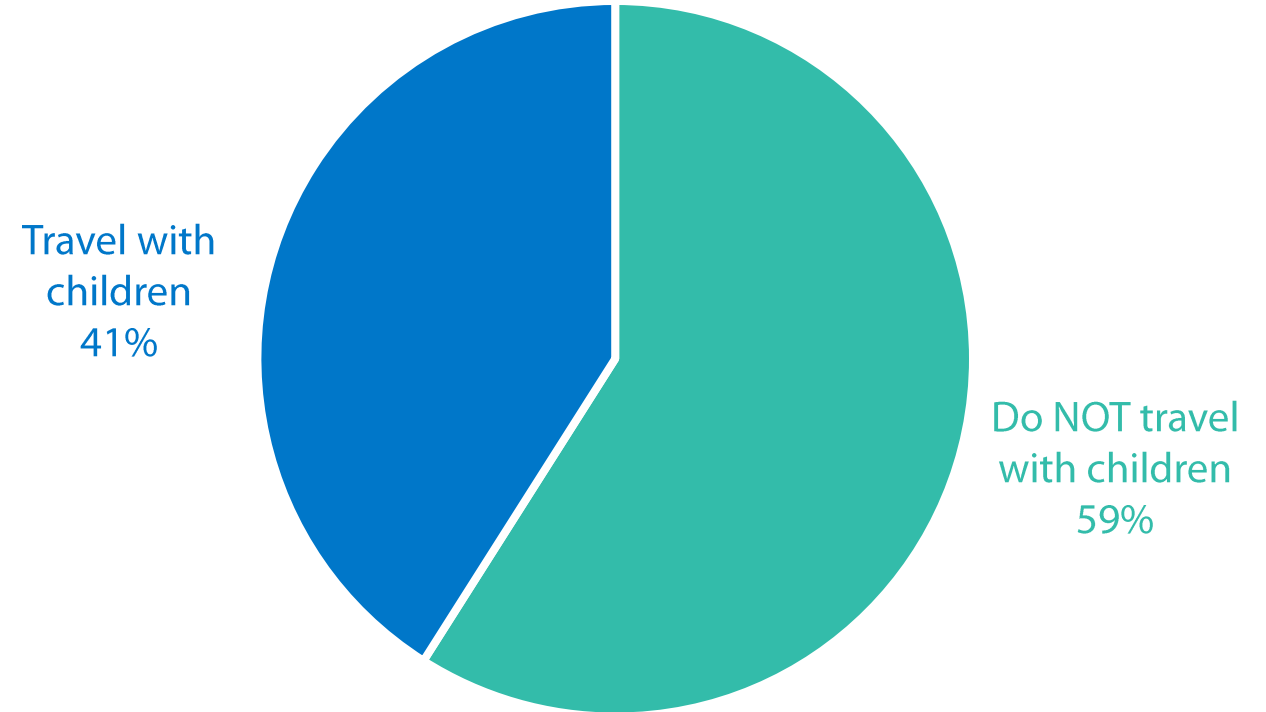
<sup>1</sup> Sources: Zartico and Visitor Tracking Study.

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

# TRAVEL PARTIES

» For all visitors, the typical travel party size was **2.6** (2.8 in 2023)

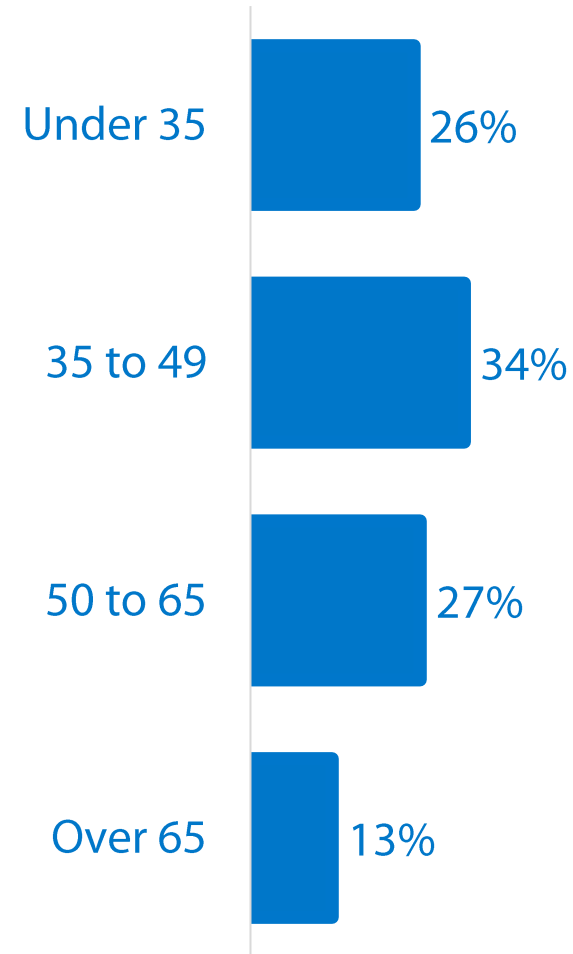
» **41%** of travel parties included children under the age of 20 (41% in 2023)





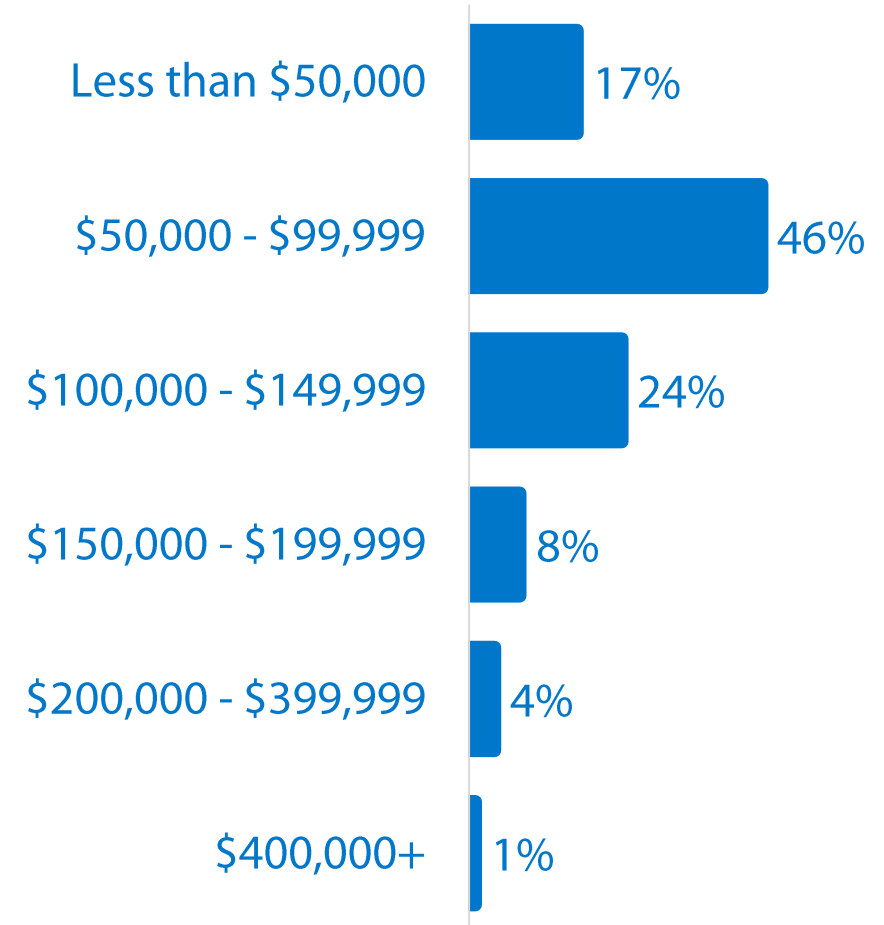
# AGE

» The median age of visitors to the Pensacola area was **46** (45 in 2023)



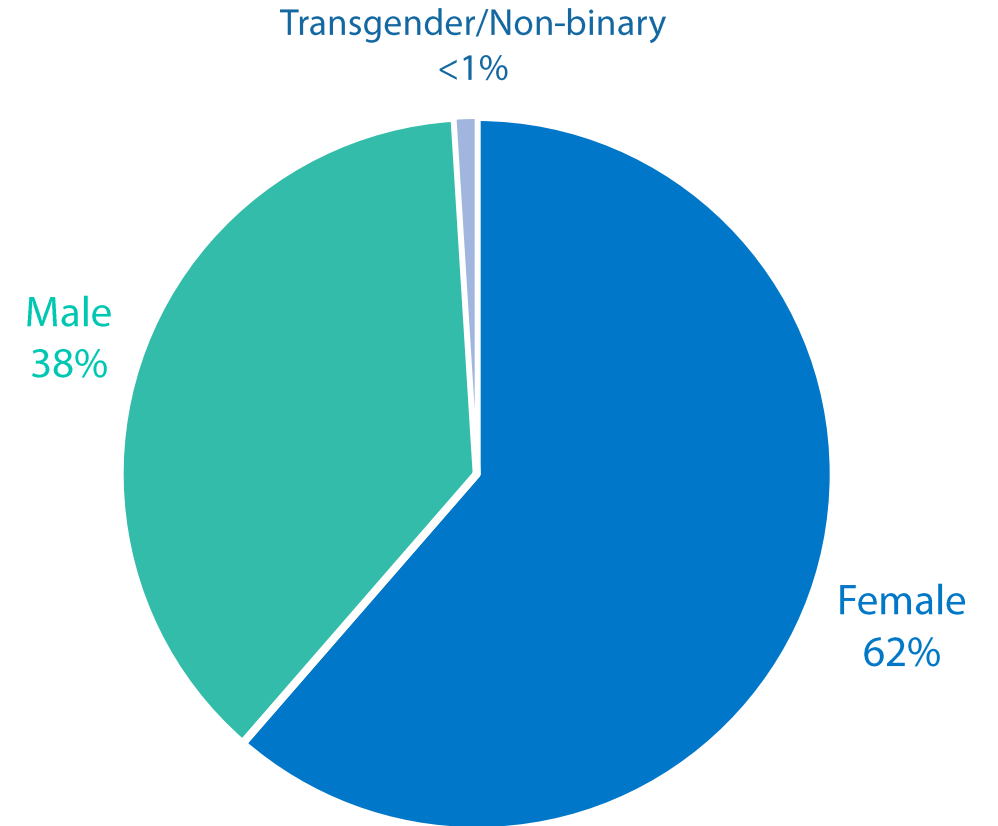
# HOUSEHOLD INCOME

- » Visitors to the Pensacola area had a median household income of **\$85,900** per year (\$79,800 in 2023)
- » **13%** of visitors had household incomes **over \$150,000**



# GENDER

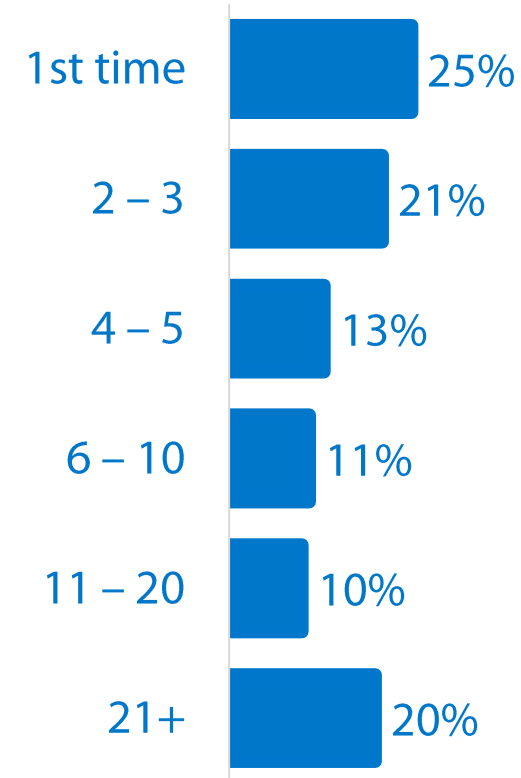
» **62%** of visitors interviewed were **female**<sup>1</sup>  
(63% in 2023)



<sup>1</sup>May be influenced by visitor's willingness to complete a survey.

# NEW & RETURNING VISITORS

- » **1 in 4** visitors said this was their **first time visiting** the Pensacola area (22% in 2023)
- » **3 in 10** visitors are loyalists, having visited the Pensacola area over 10 times (33% in 2023)



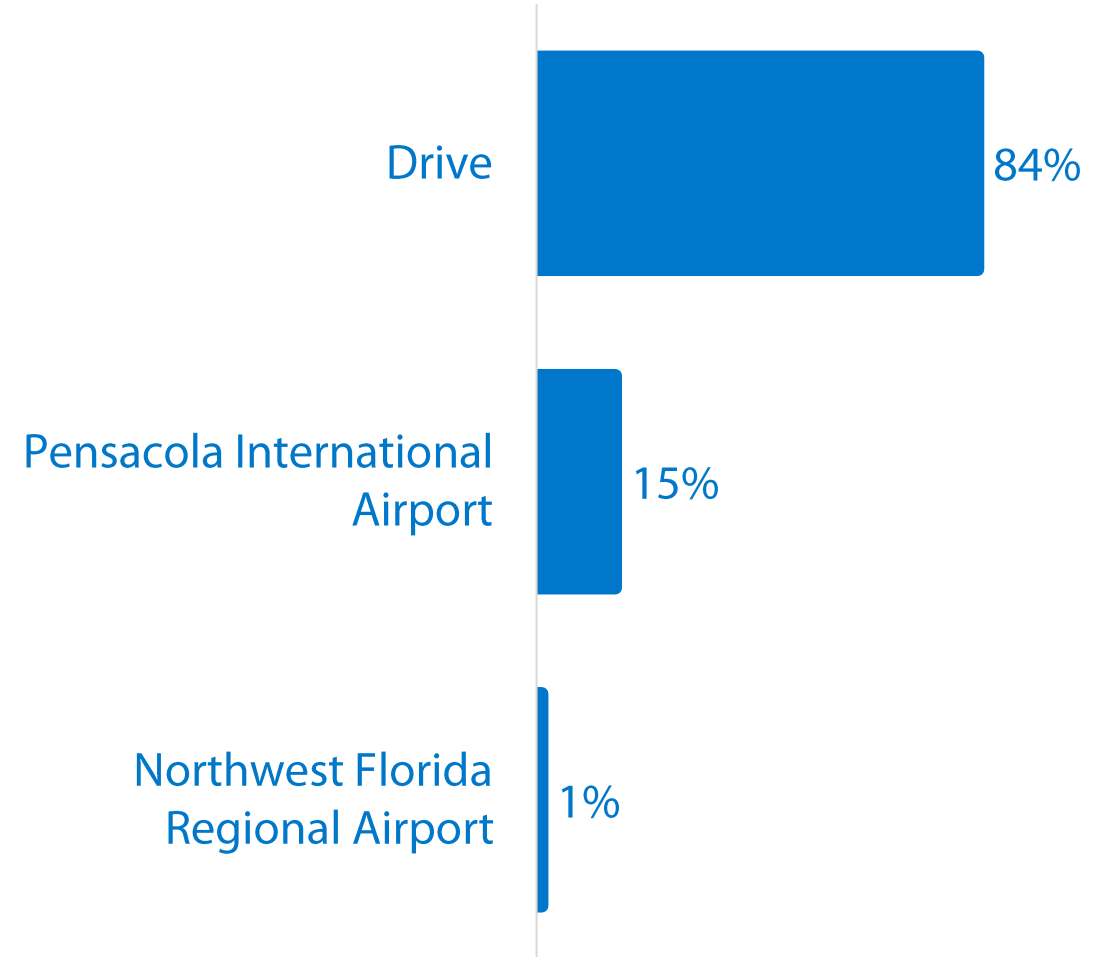


# VISITOR JOURNEY: TRIP EXPERIENCE



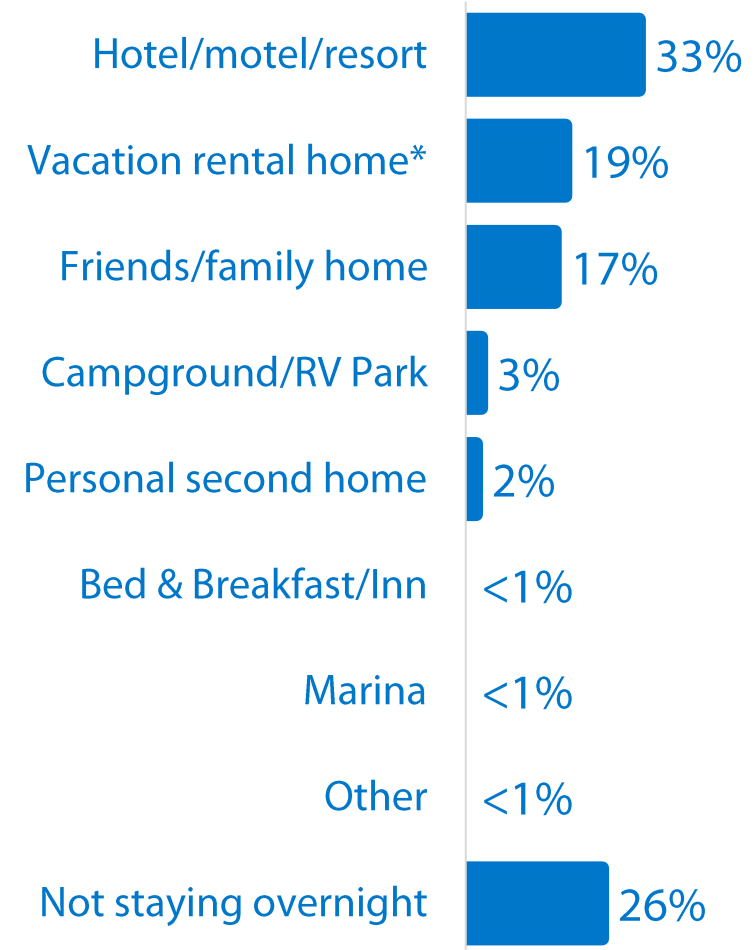
# TRANSPORTATION

- » **84%** of visitors **drove** to Pensacola area for their trip (84% in 2023)
- » **15%** of **all** visitors used the **Pensacola International Airport** (14% in 2023)



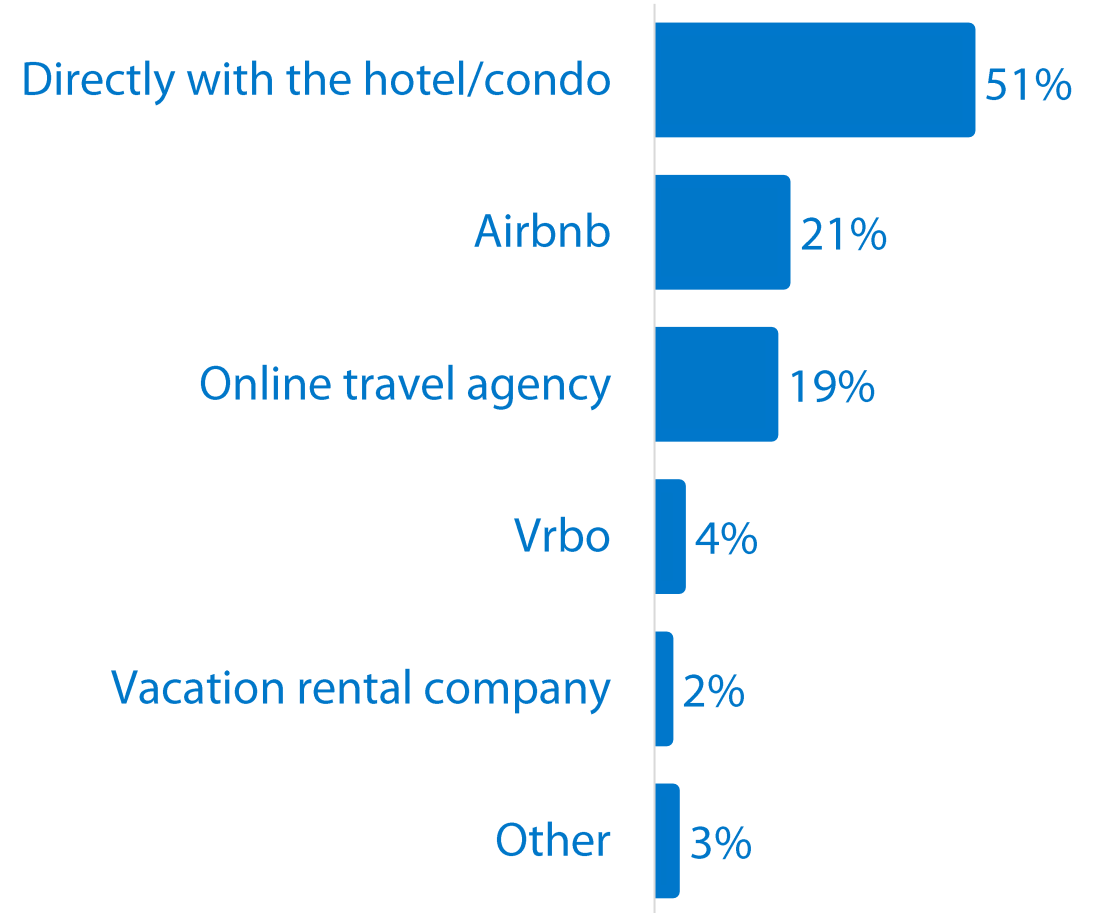
# ACCOMMODATIONS

- » **1 in 3** visitors stayed overnight in a **hotel, motel, or resort** (30% in 2023)
- » Typical visitors stayed **4.5** nights in Pensacola area (4.6 in 2023)
- » Typical visitors staying in paid accommodations stayed **5.1** nights in the Pensacola area (5.4 in 2023)



# ACCOMMODATION BOOKING

- » Over **half** of visitors booked their trip to the Pensacola area **directly with the hotel/condo** (51% in 2023)
- » Over **1 in 5** visitors booked through **Airbnb** (19% in 2023)

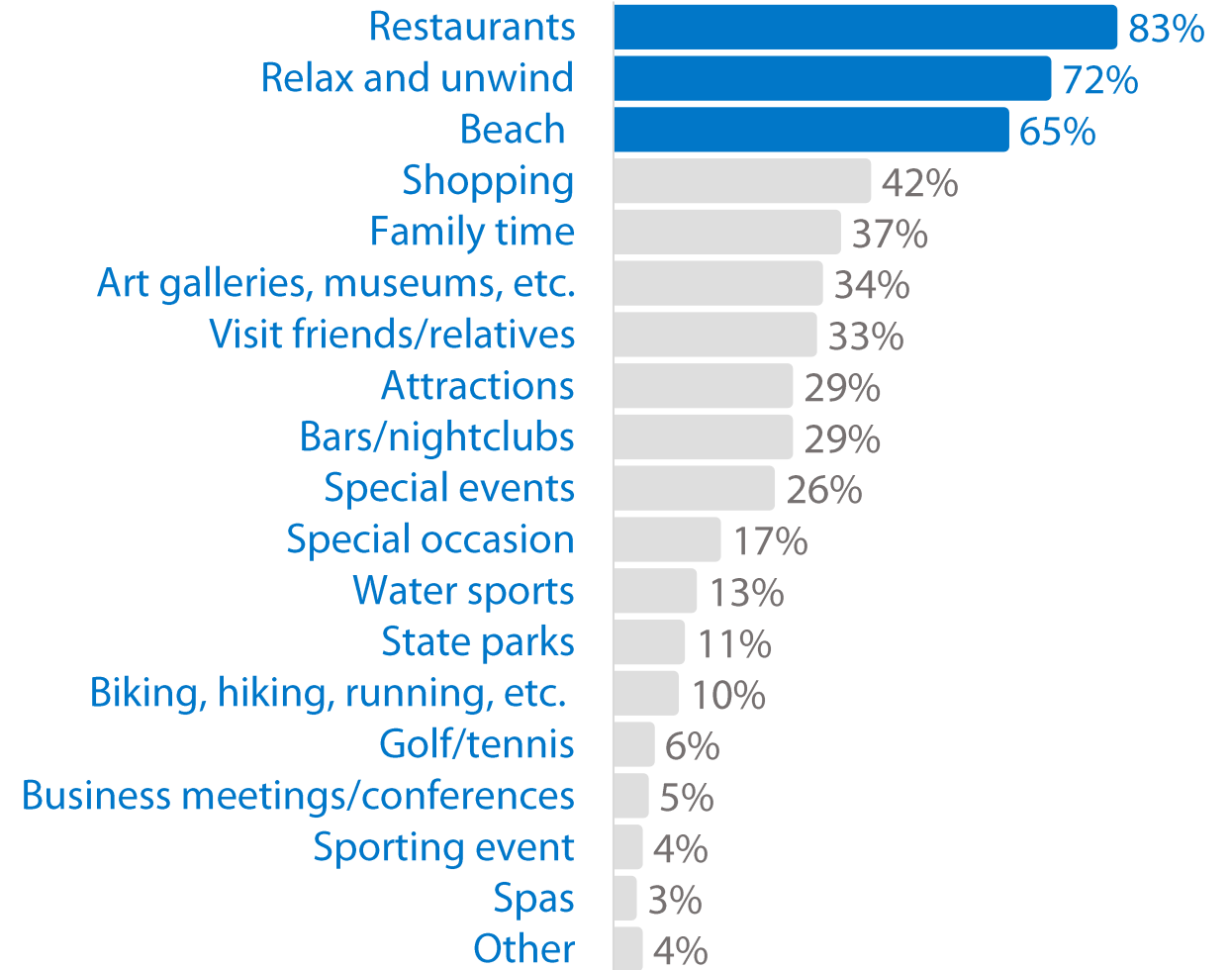




# VISITOR ACTIVITIES<sup>1</sup>

» Top activities enjoyed by visitors this quarter include:

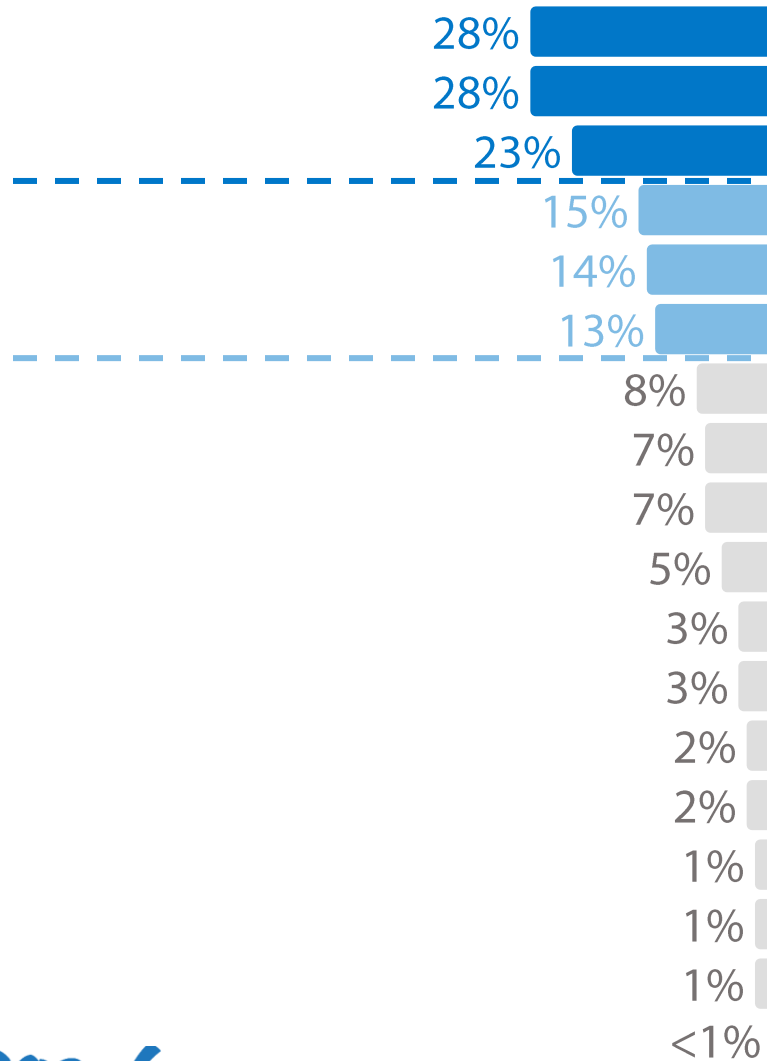
- » **Eating at restaurants**
- » **Relaxing**
- » **Visiting the beach**



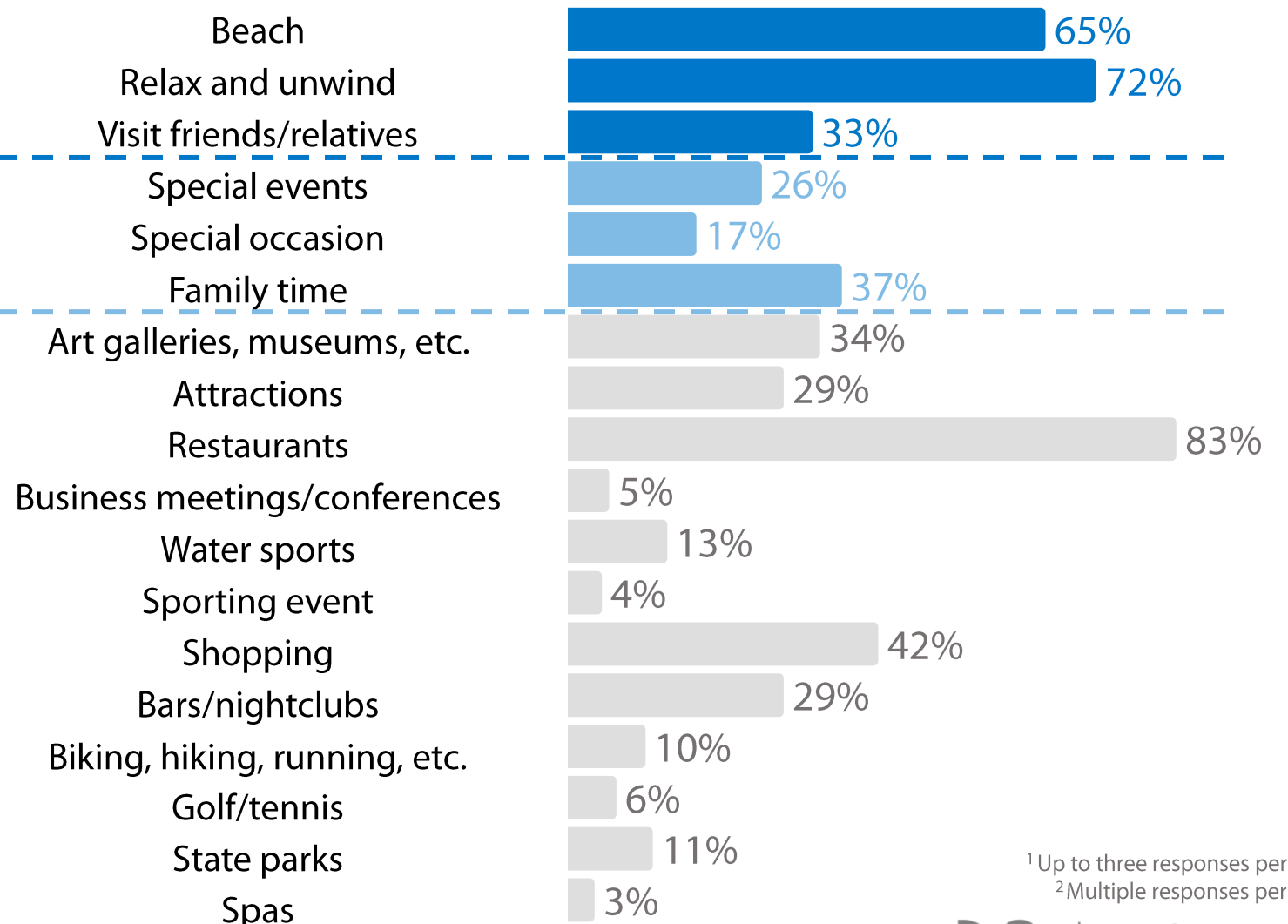
<sup>1</sup> Multiple responses permitted.

# ACTIVITIES V. REASON FOR VISIT

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



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



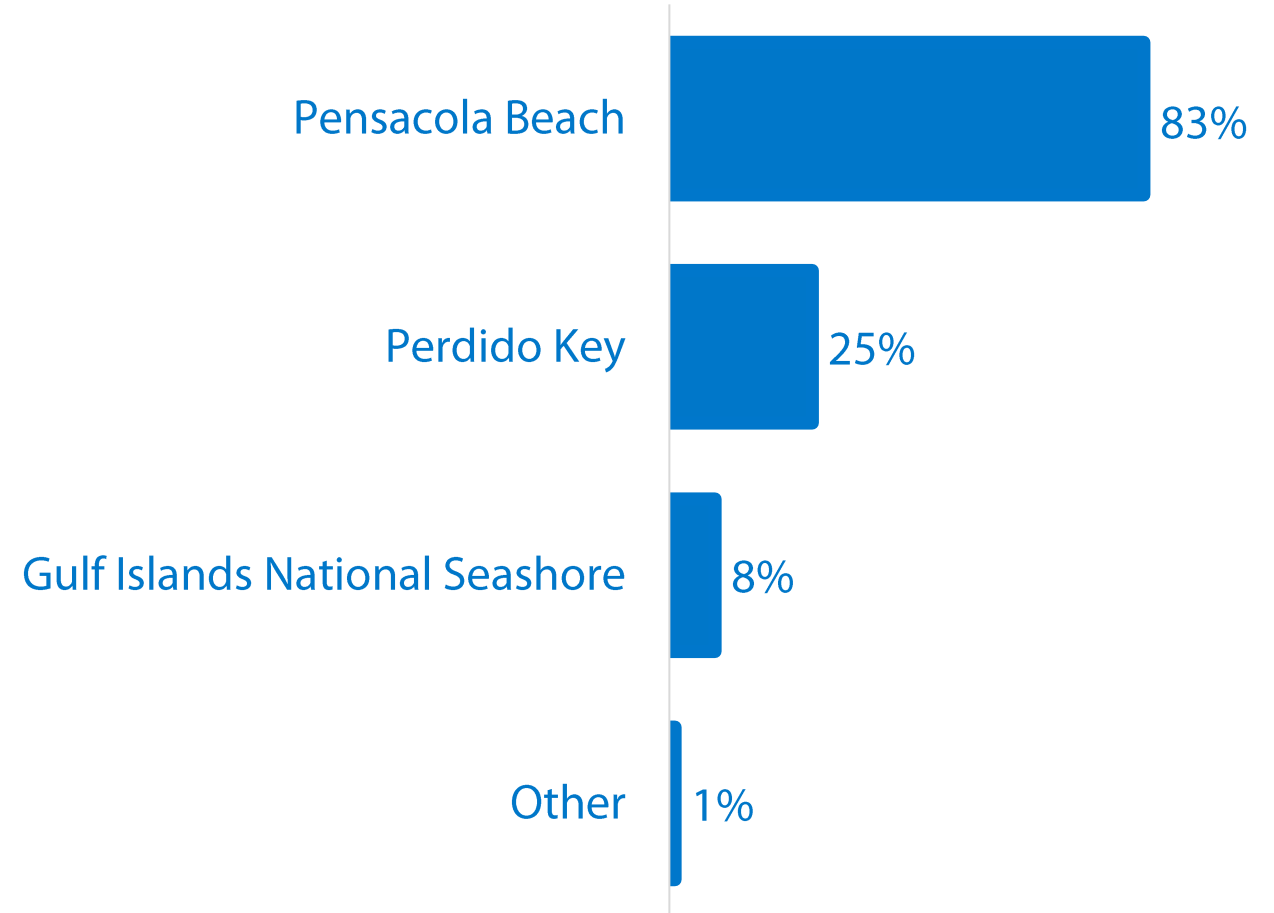
<sup>1</sup> Up to three responses permitted.

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

# BEACHES VISITED<sup>1</sup>

» Over **4 in 5** visitors who visited the beach went to Pensacola Beach

» **1 in 4** visited Perdido Key



# DAILY TRAVEL PARTY SPENDING

	All Visitors 2023	All Visitors 2024
Accommodations	\$96	\$101
Restaurants	\$81	\$85
Groceries	\$16	\$14
Shopping	\$34	\$35
Entertainment	\$34	\$35
Transportation	\$28	\$23
Other	\$2	\$1
<b>Daily Spending</b>	<b>\$291</b>	<b>\$294</b>



# TOTAL TRAVEL PARTY SPENDING

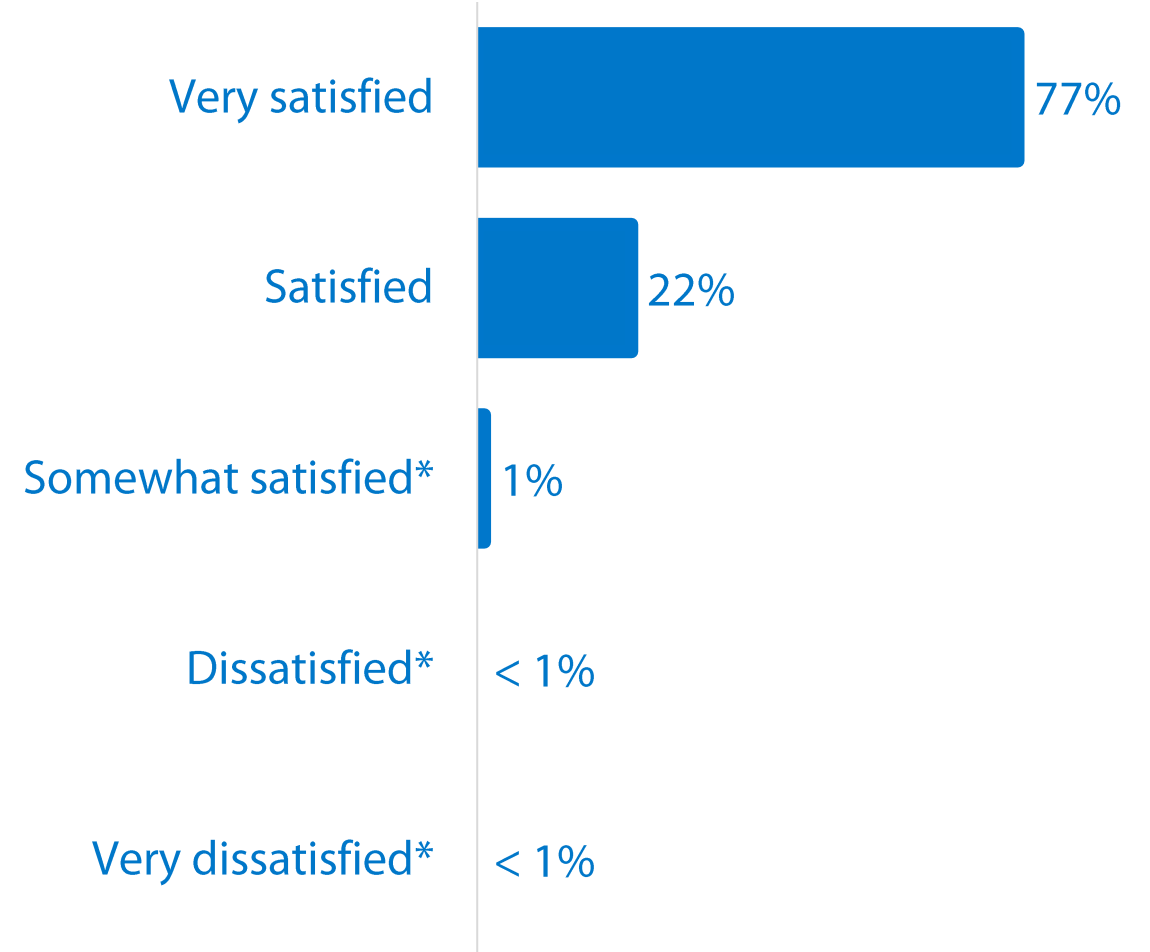
	All Visitors 2023	All Visitors 2024
Accommodations	\$442	\$455
Restaurants	\$373	\$383
Groceries	\$74	\$63
Shopping	\$156	\$158
Entertainment	\$156	\$158
Transportation	\$129	\$104
Other	\$9	\$5
<b>Total Spending</b>	<b>\$1,339</b>	<b>\$1,326</b>

# VISITOR JOURNEY: POST-TRIP



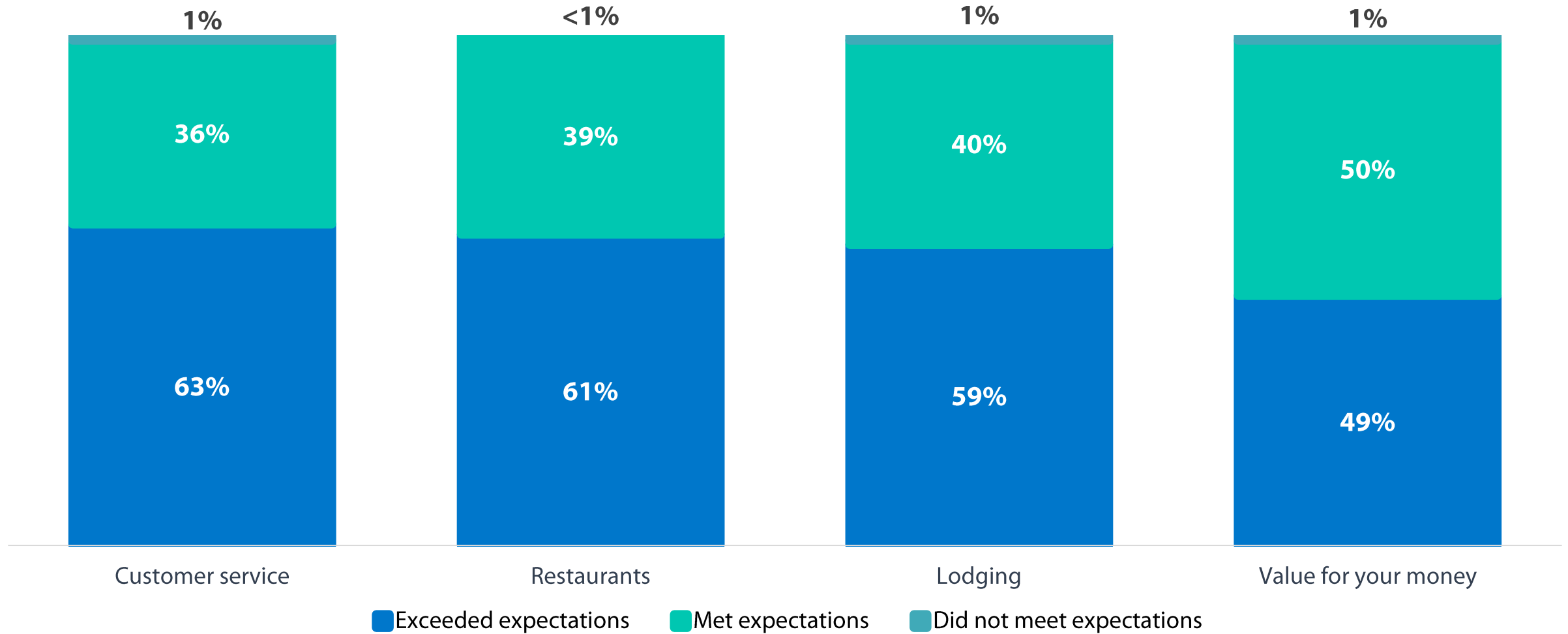
# VISITOR SATISFACTION

- » **99%** of visitors were **satisfied** with their trip to the Pensacola area (99% in 2023)
- » Over **3 in 4** visitors were **very satisfied** with their trip to the Pensacola area (76% in 2023)



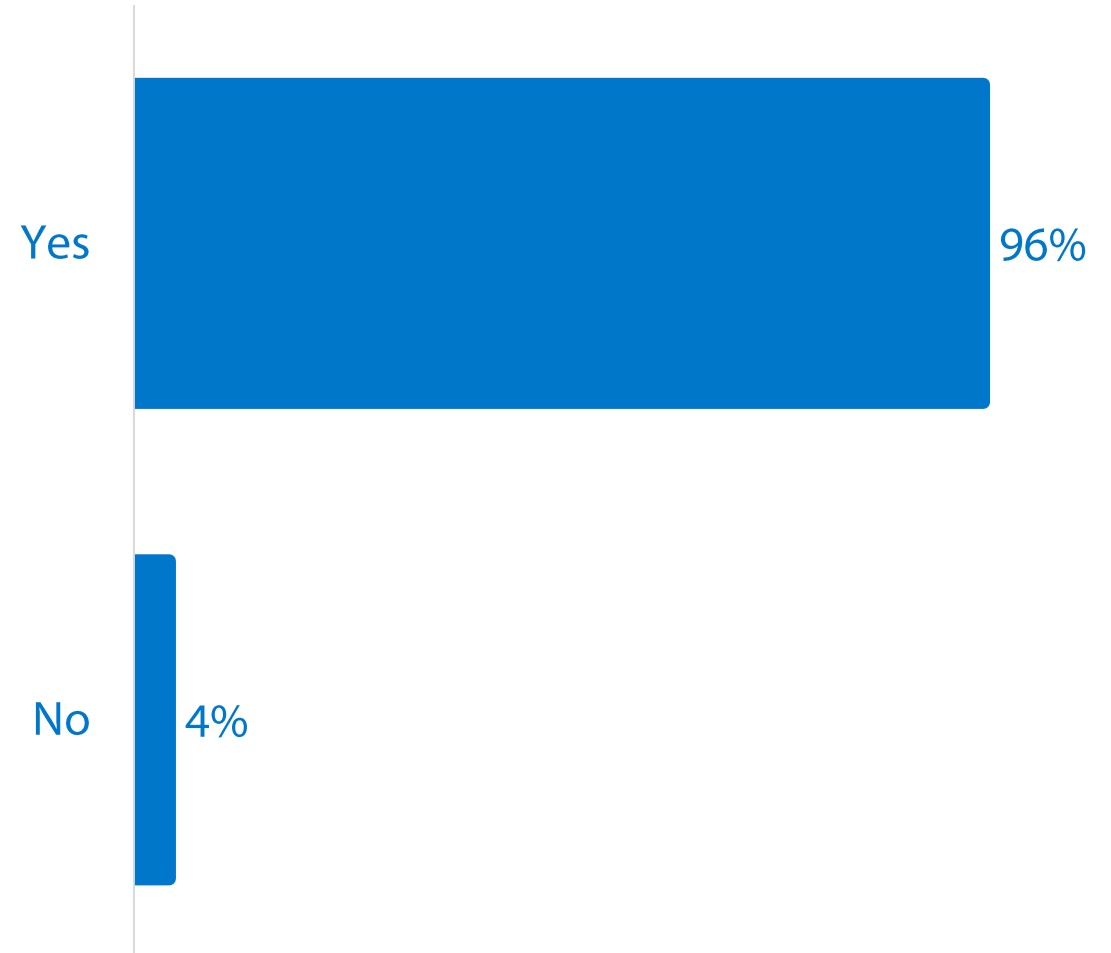
\*Those who said somewhat satisfied, dissatisfied, or very dissatisfied were asked what features they liked least about the area.

# SATISFACTION RATINGS



# RECOMMENDATION

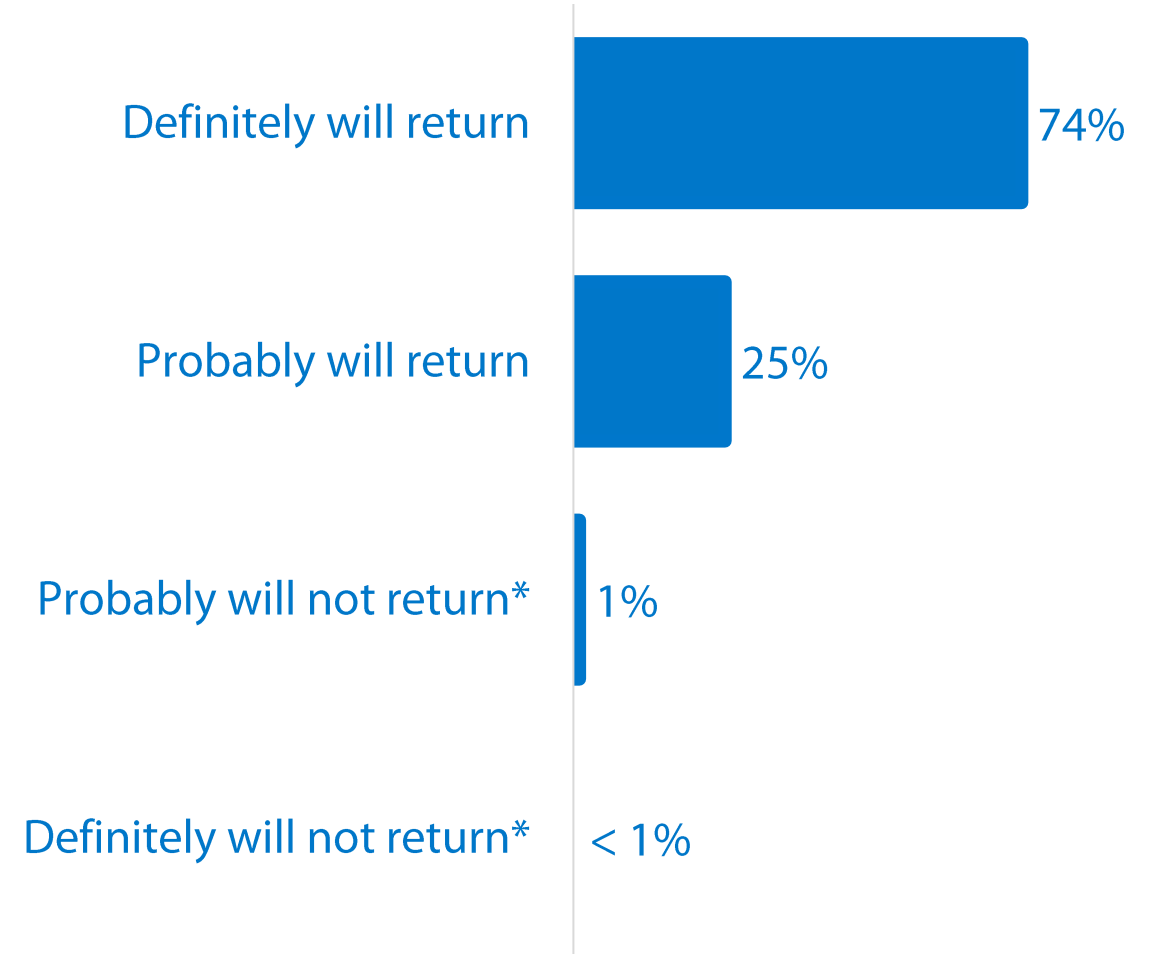
» **Over 9 in 10** visitors would recommend the Pensacola area to others (94% in 2023)





# LIKELIHOOD OF RETURNING

- » **99%** of visitors would **return** to the Pensacola area (**99%** in 2023)
- » Nealy **3 in 4** visitors would **definitely return** to the Pensacola area (**72%** in 2023)
- » Of visitors who would not return, the reason listed most often was **preference for a variety in vacation spots**



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

# AREA DESCRIPTIONS\*



- » “Best place to spend the winter. Very clean and friendly, good place to relax.”
- » “I understand why so many people suggested Pensacola to me. It's a beautiful place and the people are quite nice.”
- » “It's fun and relaxing, even in cooler weather. The sand is so soft and the ocean is beautiful. There are really good restaurants too. And the aviation museum was amazing.”
- » “Pensacola is a perfectly wonderful city and we're planning to visit in the warmer months so we can enjoy water sports and the beach. The people are so nice and welcoming. Walking around downtown and the historic district has been one of my favorite things to do this busy trip.”
- » “We love spending our winter in Pensacola. It's rarely too hot or too cold. So many activities going on. Really good restaurants and the beach is great.”

\*Open-ended responses. Multiple responses permitted.

# AREAS OF IMPROVEMENT\*



- » "Been coming here for years. Getting too crowded in the summer but this time of year is perfect."
- » "Pretty, relaxing city; cluttered traffic at times."
- » "It's like a mini paradise, minus the overly crowded beach."

\*Open-ended responses. Multiple responses permitted.



## Visitor Tracking Study

- » Interviews were completed in person and online with **1,340 visitors** at the airport, beach, downtown, Naval Aviation Museum, and events between **October 1 and December 31, 2024**.



# VISIT PENSACOLA

## Visitor Tracking Study October – December 2024

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