

VISIT PENSACOLA

VISITOR TRACKING STUDY

OCTOBER – DECEMBER 2025



METHODOLOGY



Interviews were completed in-person and online with **841** visitors between **October 1 and December 31, 2025**.

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

OCTOBER TO DECEMBER 2025



523,100

TOTAL
VISITORS

vs. 2024

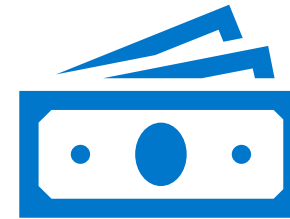
↑ 1.1%



546,900

ROOM
NIGHTS

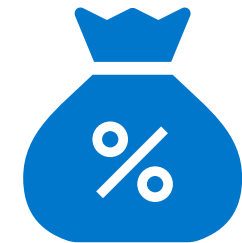
↑ 4.8%



\$281,896,400

DIRECT
SPENDING

↑ 3.1%



\$4,199,646

TOURIST
DEVELOPMENT TAX¹

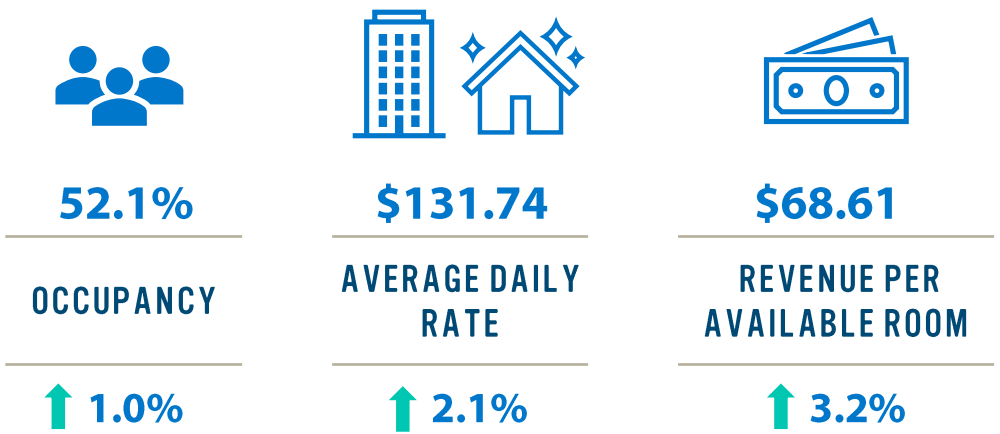
↓ 1.1%

LODGING METRICS

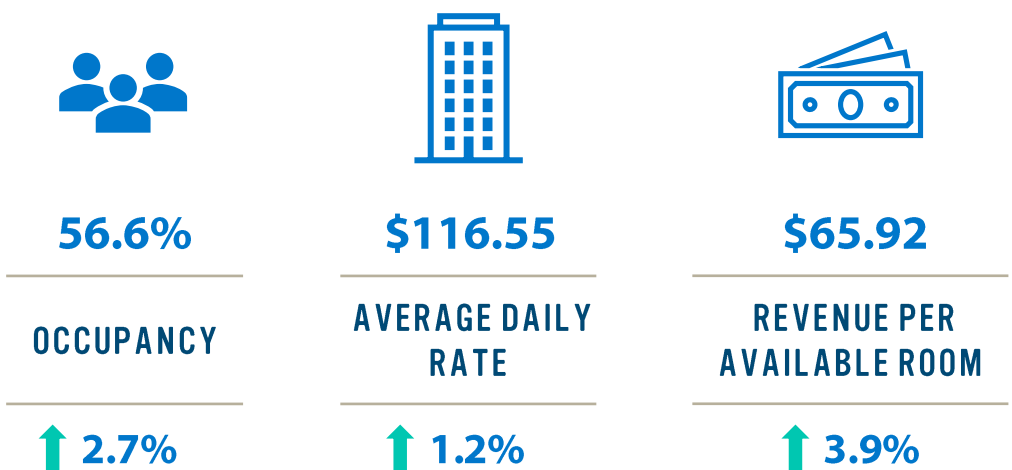
OCTOBER TO DECEMBER 2025

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

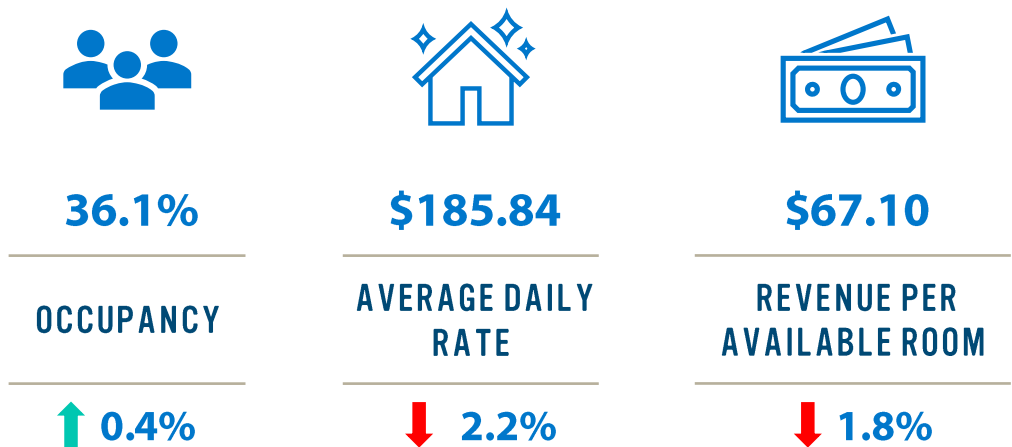
COMBINED



HOTELS¹



VACATION RENTALS²



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.

	ALL VISITORS ¹ 2024	ALL VISITORS ¹ 2025
Accommodations ¹	\$101	\$76
Restaurants	\$85	\$96
Groceries	\$14	\$17
Shopping	\$35	\$37
Entertainment	\$35	\$39
Transportation	\$23	\$23
Other	\$1	\$1
Daily Spending	\$294	\$289

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

TOTAL TRAVEL PARTY SPENDING

OCTOBER TO DECEMBER 2025

	ALL VISITORS ¹ 2024	ALL VISITORS ¹ 2025
Accommodations ¹	\$455	\$304
Restaurants	\$383	\$384
Groceries	\$63	\$68
Shopping	\$158	\$148
Entertainment	\$158	\$156
Transportation	\$104	\$92
Other	\$5	\$4
Total Spending	\$1,326	\$1,156

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

	OCTOBER – DECEMBER 2024	OCTOBER – DECEMBER 2025	% Δ
Visitors	517,300	523,100	+1.1%
Direct Spending	\$273,472,600	\$281,896,400	+3.1%
Room Nights	521,700	546,900	+4.8%
TDT ¹	\$4,244,228	\$4,199,646	-1.1%

¹ Source: Clerk & Comptroller Escambia County.

LODGING METRICS YOY

OCTOBER TO DECEMBER 2025

COMBINED LODGING METRICS	OCTOBER – DECEMBER 2024	OCTOBER – DECEMBER 2025	% Δ
Occupancy	51.5%	52.1%	+1.0%
ADR	\$129.03	\$131.74	+2.1%
RevPAR	\$66.50	\$68.61	+3.2%

HOTEL METRICS ¹	OCTOBER – DECEMBER 2024	OCTOBER – DECEMBER 2025	% Δ
Occupancy	55.1%	56.6%	+2.7%
ADR	\$115.15	\$116.55	+1.2%
RevPAR	\$63.43	\$65.92	+3.9%

VACATION RENTAL METRICS ²	OCTOBER – DECEMBER 2024	OCTOBER – DECEMBER 2025	% Δ
Occupancy	36.0%	36.1%	+0.4%
ADR	\$190.12	\$185.84	-2.2%
RevPAR	\$68.36	\$67.10	-1.8%

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





25%
Viewed Visitor Guide

19%
First-time Visitor

2.5
Travel Party Size²

83%
Drove

32%
Traveled with children¹

4.0
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
58%
(55% in 2024)



Day trippers
26%
(26% in 2024)

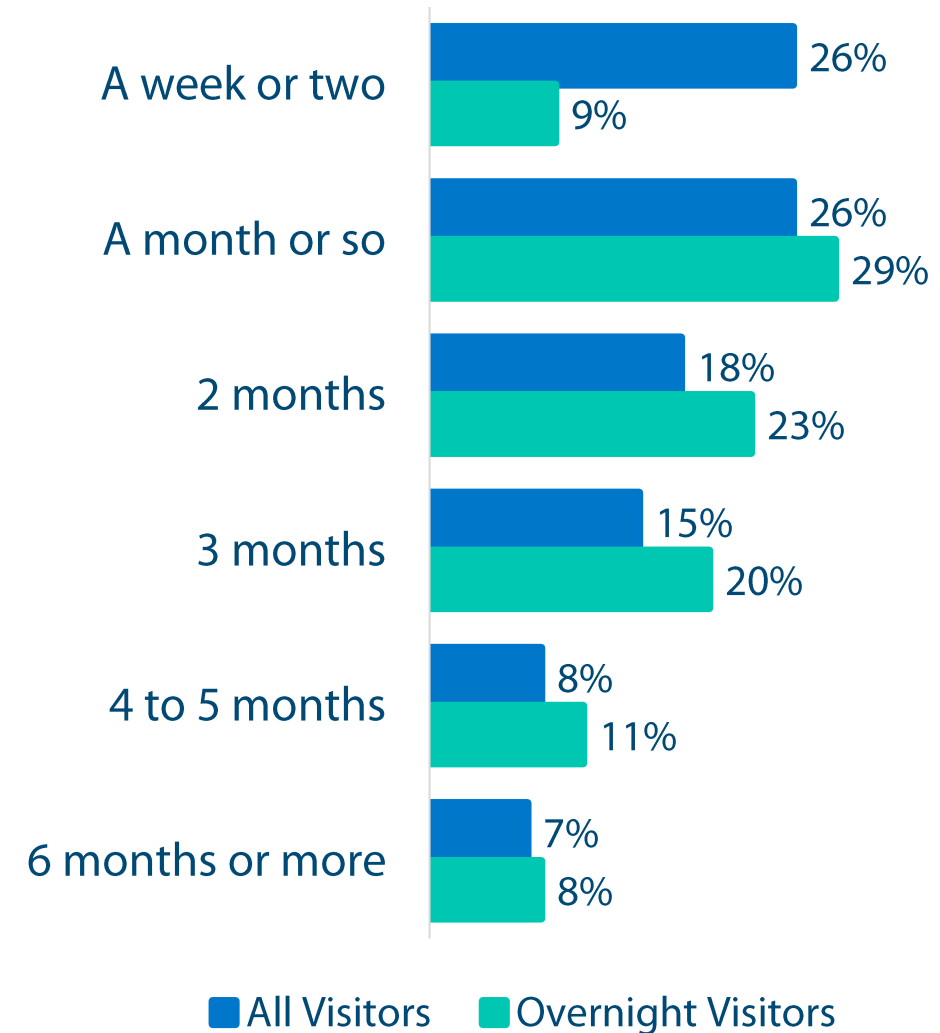


Nonpaid accommodations²
16%
(19% in 2024)

TRIP PLANNING CYCLE

OCTOBER TO DECEMBER 2025

- » On average, visitors¹ to the Pensacola area planned their trip the Pensacola area **58 days (about two months) in advance** (57 days in 2024)
- » Visitors staying overnight² had a longer trip planning period of **69 days (over two months) in advance** (66 days in 2024)



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

²Includes visitors staying in paid accommodations and nonpaid accommodations.

TOP TRIP PLANNING SOURCES¹

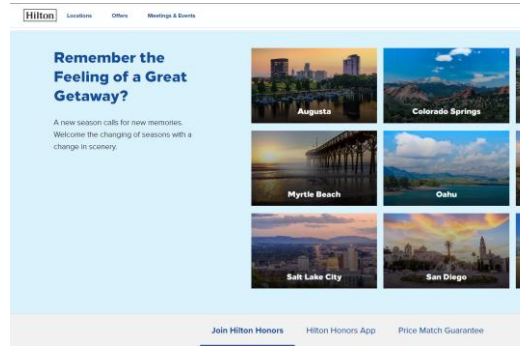
OCTOBER TO DECEMBER 2025



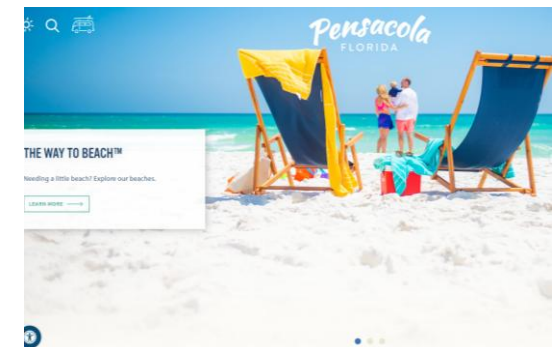
Search sites
73%
(69% in 2024)



Friends/family
45%
(40% in 2024)



Hotel websites/apps
25%
(26% in 2024)



VisitPensacola.com
22%
(18% in 2024)



Airline websites/apps
22%
(19% in 2024)



Vacation rental websites
20%
(19% in 2024)



Personal social media
19%
(21% in 2024)

¹ Multiple responses permitted.

TOP REASONS FOR VISITING¹

OCTOBER TO DECEMBER 2025



Beach
27%
(28% in 2024)



Relax and unwind
26%
(28% in 2024)



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



Special occasion
17%
(14% in 2024)

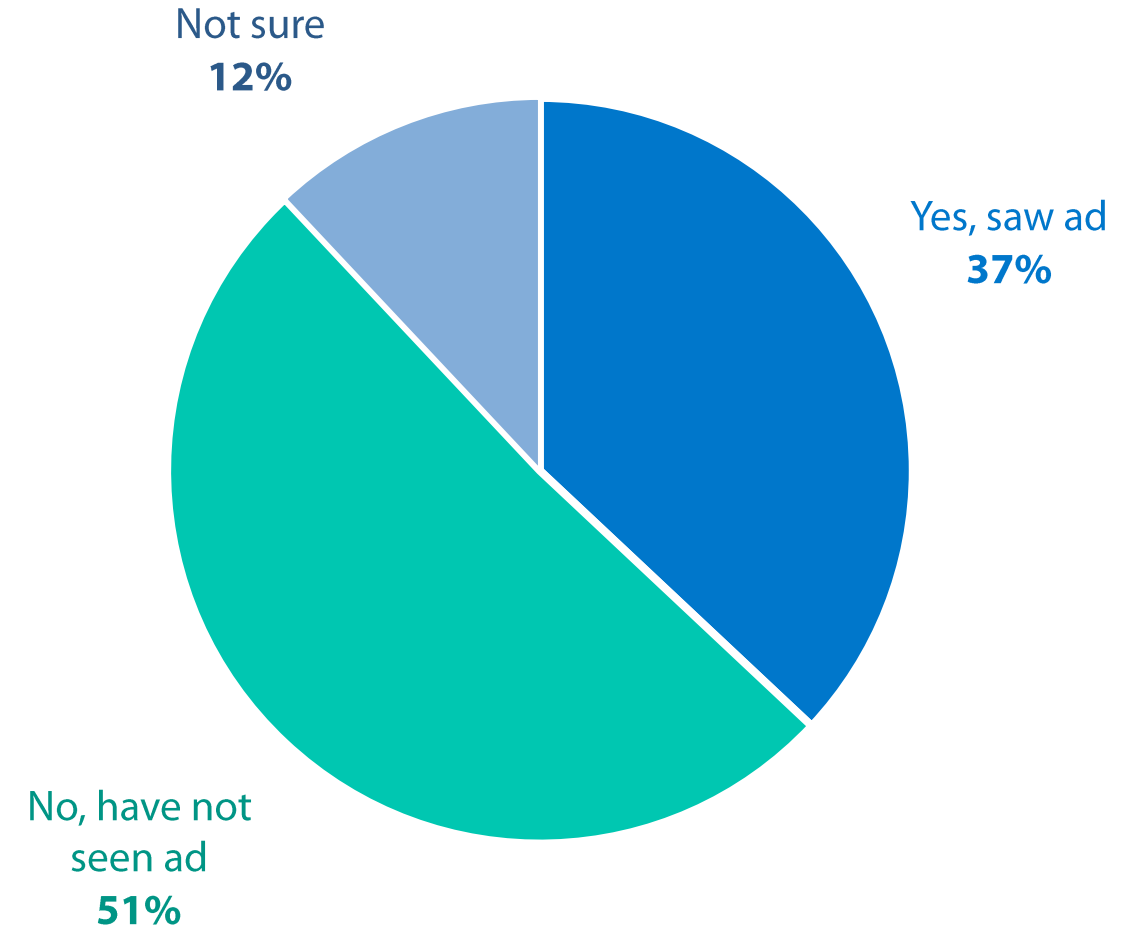


Special events
16%
(15% in 2024)



Family time
11%
(13% in 2024)

» **37%** of visitors **recalled advertising** about the Pensacola area (32% in 2024)

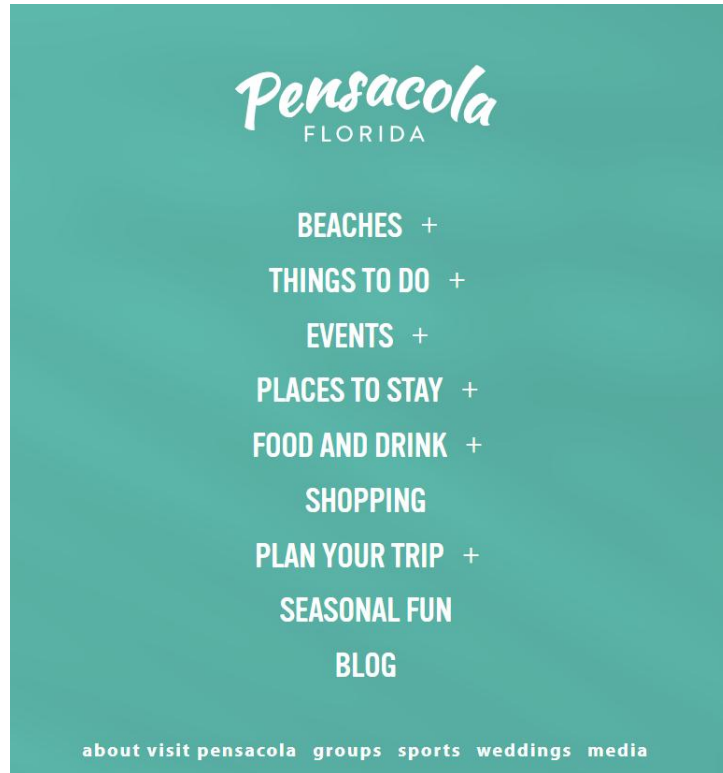


¹ Note: These figures are topline and solely relies on the memory of each visitor even though various other factors go into the influence of advertising.

TOP SOURCES OF AD RECALL

OCTOBER TO DECEMBER 2025

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



VisitPensacola.com
39%
(29% in 2024)



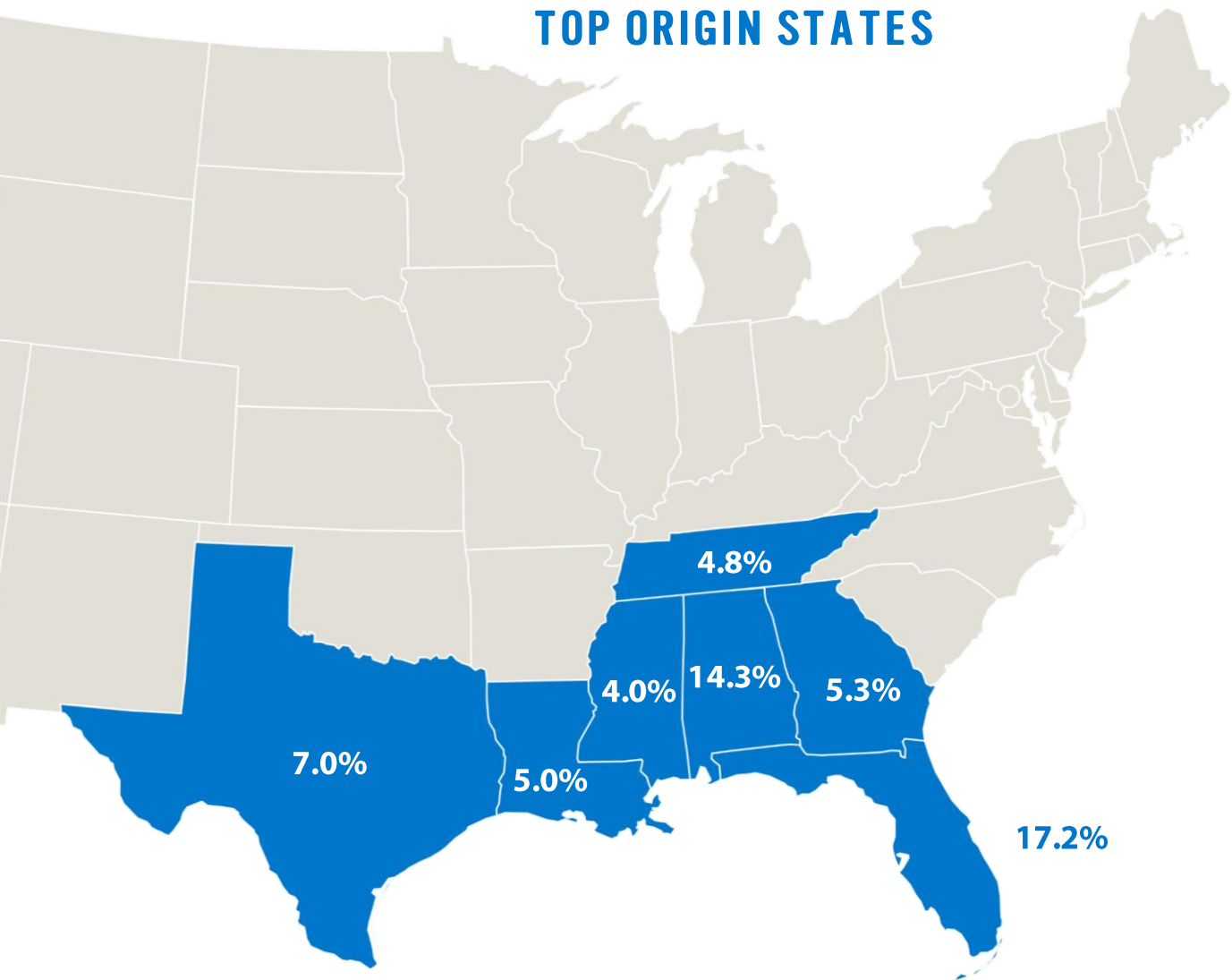
Personal social media
28%
(28% in 2024)



Television
25%
(26% in 2024)

¹ Multiple responses permitted.

DS downs & st. germain
RESEARCH



TOP MARKETS	2024	2025
Mobile ²	15.2%	16.9%
Atlanta	4.3%	4.2%
New Orleans	2.7%	3.4%
Birmingham	3.2%	3.4%
Dallas – Fort Worth	2.0%	2.7%
Nashville	3.3%	2.7%
Houston	1.9%	1.7%
Orlando – Daytona Beach – Melbourne	1.7%	1.5%

2.1% of visitors traveled to the Pensacola area from **outside of the U.S.** The majority of international visitors came from Ontario (0.4%), the Netherlands (0.4%), British Columbia (0.1%), Quebec (0.1%), and United Kingdom (0.1%).

TOP ACTIVITIES DURING VISIT¹

OCTOBER TO DECEMBER 2025



Restaurants
84%
(83% in 2024)



Relax and unwind
73%
(72% in 2024)



Beach
62%
(65% in 2024)



Shopping
53%
(42% in 2024)



Visit friends/relatives
39%
(33% in 2024)



Bars/nightclubs
33%
(29% in 2024)



Family time
33%
(37% in 2024)



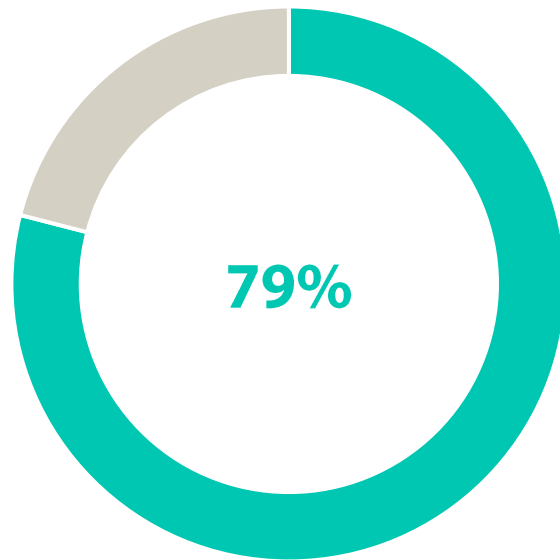
Art galleries/museums
31%
(34% in 2024)



Special events
30%
(26% in 2024)

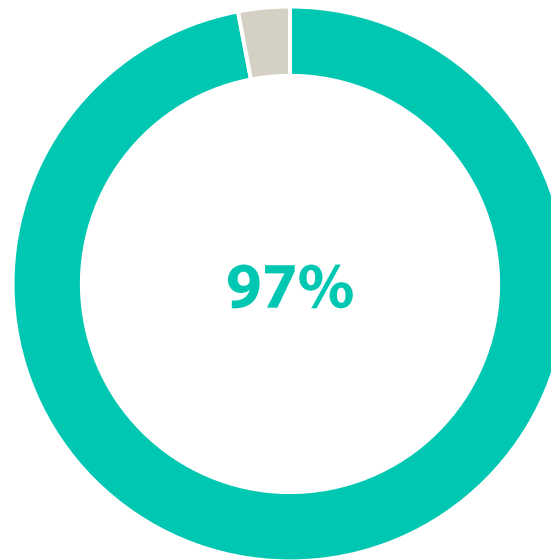


Attractions
28%
(29% in 2024)



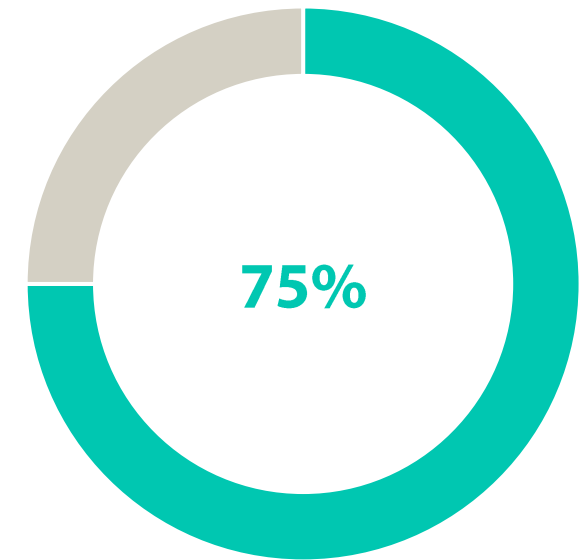
VERY SATISFIED

Nearly 4 in 5 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

3 in 4 visitors would definitely return to the Pensacola area.



AREA DESCRIPTORS

- » **Iconic beaches** – “Some of the most beautiful beaches anywhere.” / “The water is really turquoise, and the sand is soft and white.” / “The beaches are gorgeous with all the shells and wildlife.”
- » **Friendly and welcoming vibe** – “Nice people.” / “Lovely area, friendly people.” / “There’s plenty of good food and friendly people.”
- » **Relaxing, laid-back, peaceful** – “Beautiful, laid back, open-minded, small-town feel.” / “The perfect place to get away and refresh.”
- » **Family-friendly** – “Nice for the whole family, very family friendly and welcoming.” / “Impressed with how well the restaurants are with children.”
- » **Charming Downtown** – “Good boutiques and restaurants in the downtown area.” / “It has a special charm.” / “Downtown is beautiful with a lot of parks.”

AREAS FOR IMPROVEMENT

- » **Parking** – “Just hate the parking situation.” / “Too much traffic...no parking downtown.” / “Parking was a pain.”

*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: OCTOBER – DECEMBER 2025

COMPARED TO OCTOBER – DECEMBER 2024, IN OCTOBER – DECEMBER 2025...

-  **Occupancy** was up **+1.0%** and **ADR** was up **+2.1%**, resulting in a **RevPAR** that was up **+3.2%**.
-  Visitor **spending** was up **+3.1%** with a **higher yield per visitor** (+1.9%).
-  More visitors utilized the **Pensacola Visitor Guide**, particularly online (+7% points).
-  There was an **increase in repeat visitors** as **28%** of visitors have visited the Pensacola area **more than 21 times** (+8% points). However, there was a **decrease in first time visitation** (-6.0% points).
-  Advertising influenced **19% of all visitors** to come to the Pensacola area (+3% points).
-  A decrease in **length of stay** (4.0 vs 4.5 in 2024) was bolstered by increased **room nights** (+4.8%) from an increase in units (+3.7%) along with an increase in occupancy (+1.0%) leading to a limited decrease in **TDT** (-1.1%).
-  Visitors have a consistent **trip planning window** of about **58 days** in advance (+1 day longer than 2024). **Overnight visitors** have **longer trip planning** periods of about **69 days** in advance (+3 days longer than 2024).
-  More visitors utilized **search Sites (Google, etc.)** (+4% points) and **friends/family** (+5% points) to plan their trip.
-  More visitors **recalled advertising** about the Pensacola area (+5% points). Of the **37%** of visitors who recalled advertising, they were more likely to see it on a **VisitPensacola.com** (+10% points), **rental agencies/booking websites** (+5% points), and **travel/visitors guides** (+4% points).

VISITOR PROFILE DETAILED FINDINGS



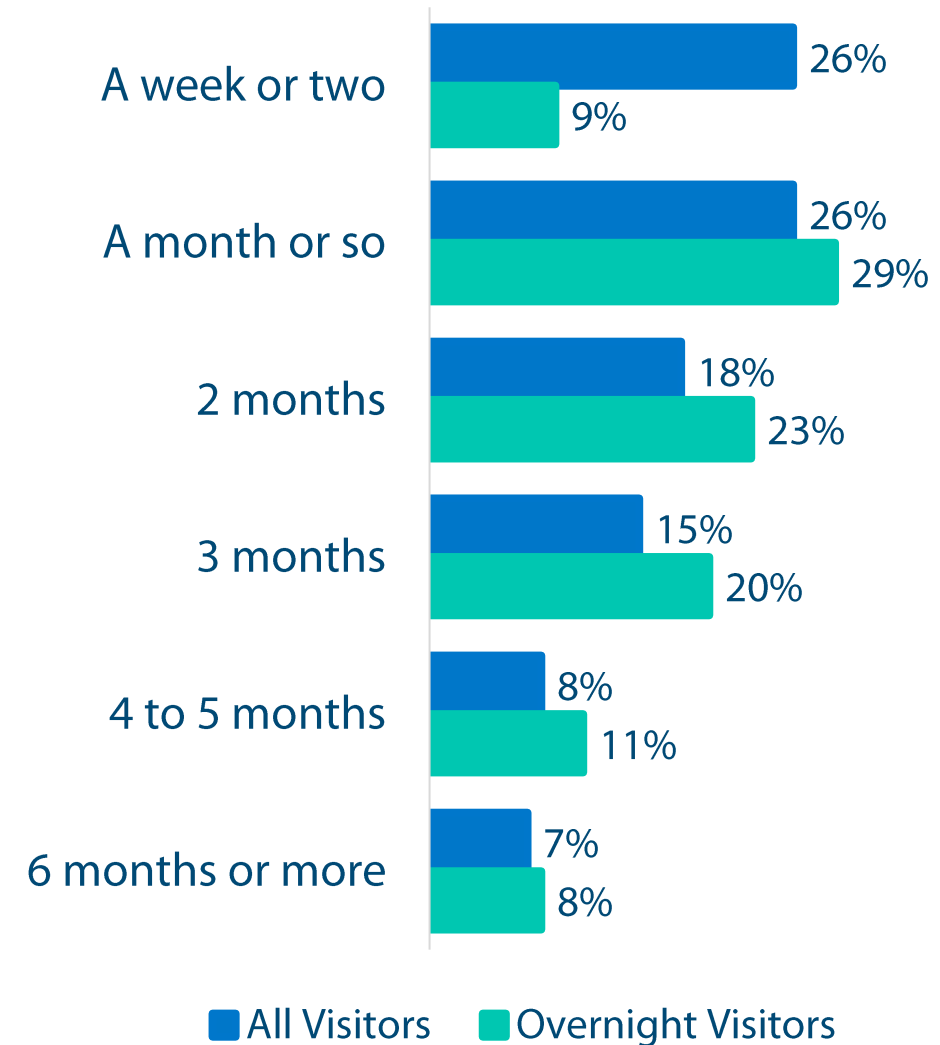
STUDY OBJECTIVES: VISITOR JOURNEY



VISITOR JOURNEY: PRE-VISIT



- » On average, visitors¹ to the Pensacola area planned their trip the Pensacola area **58 days (about two months) in advance** (57 days in 2024)
- » Visitors staying overnight² had a longer trip planning period of **69 days (over two months) in advance** (66 days in 2024)



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

²Includes visitors staying in paid accommodations and nonpaid accommodations.

ONLINE TRIP PLANNING SOURCES¹

OCTOBER TO DECEMBER 2025

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



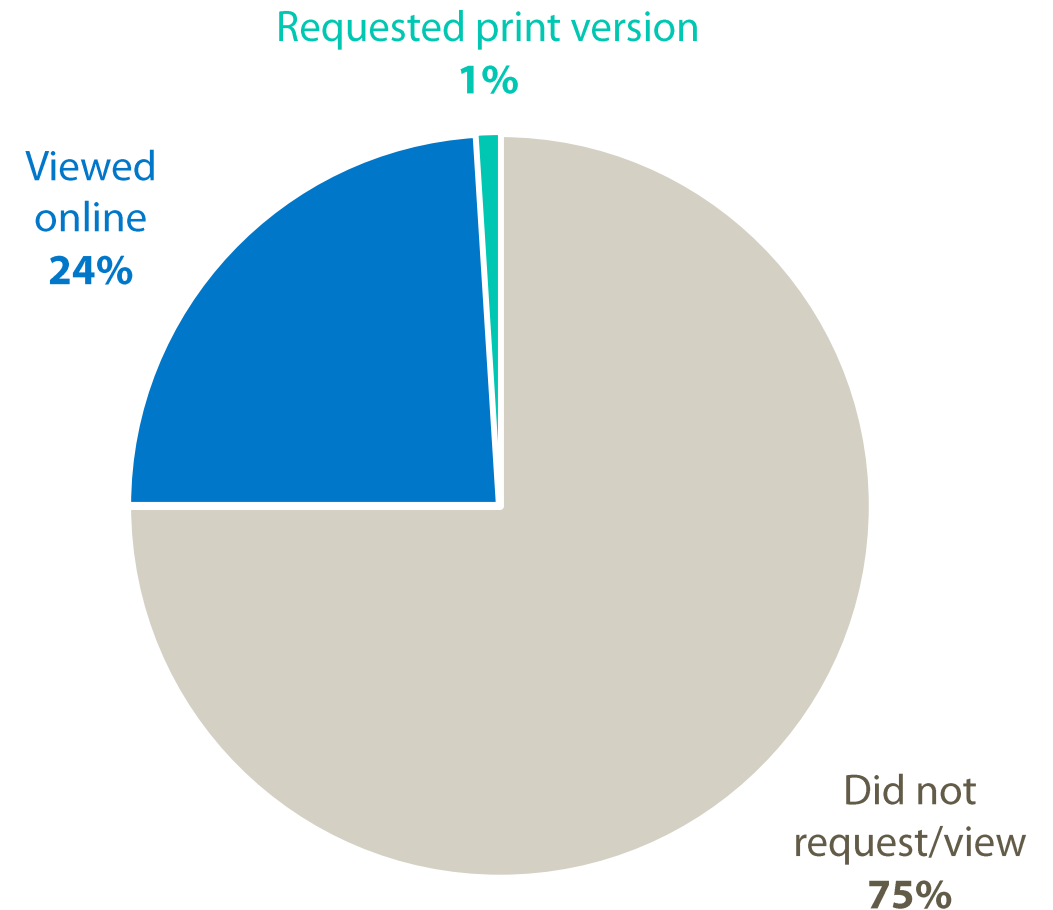
¹ Multiple responses permitted.

- » **Over 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**

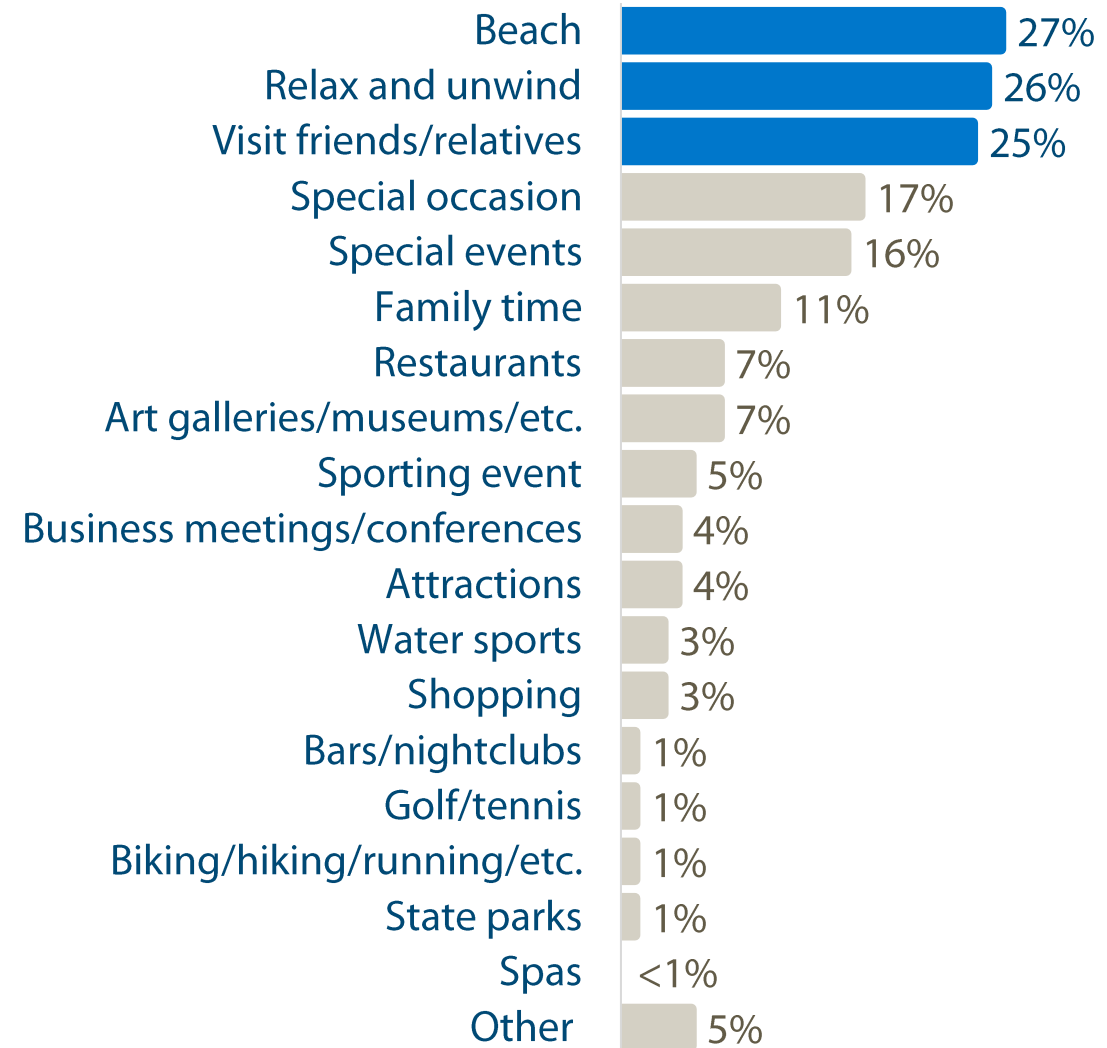


¹ Multiple responses permitted.

- » **1 in 4** visitors **requested or viewed** the Pensacola Visitors Guide (18% in 2024)
- » **Online** viewership of the Pensacola Visitor Guide was **significantly greater than print consumption**

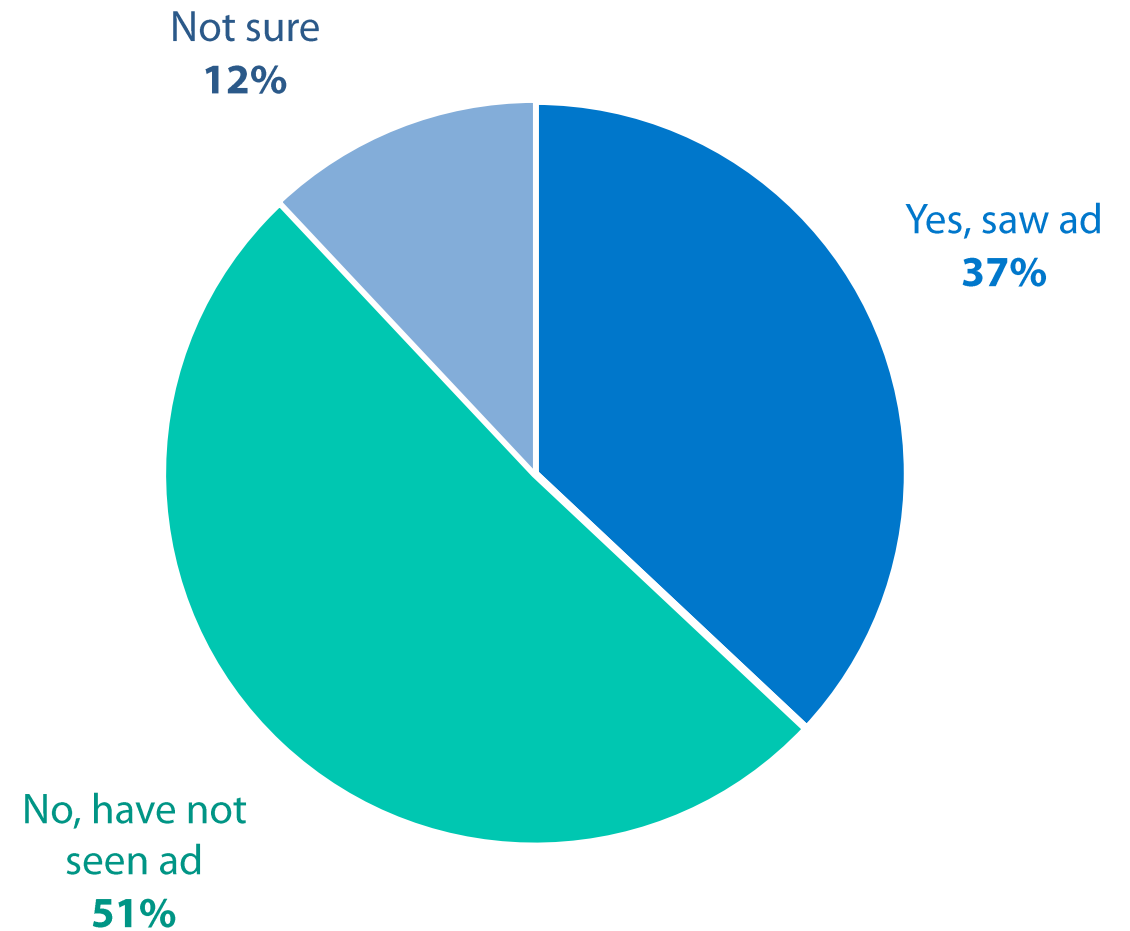


- » **Over 1 in 4** visitors came to the Pensacola area to visit the **beach**
- » **Over 1 in 4** visitors came to **relax and unwind**
- » **1 in 4** visitors came to **visit friends or relatives**



¹Up to three responses permitted

» **37%** of visitors **recalled advertising** about the Pensacola area (32% in 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.

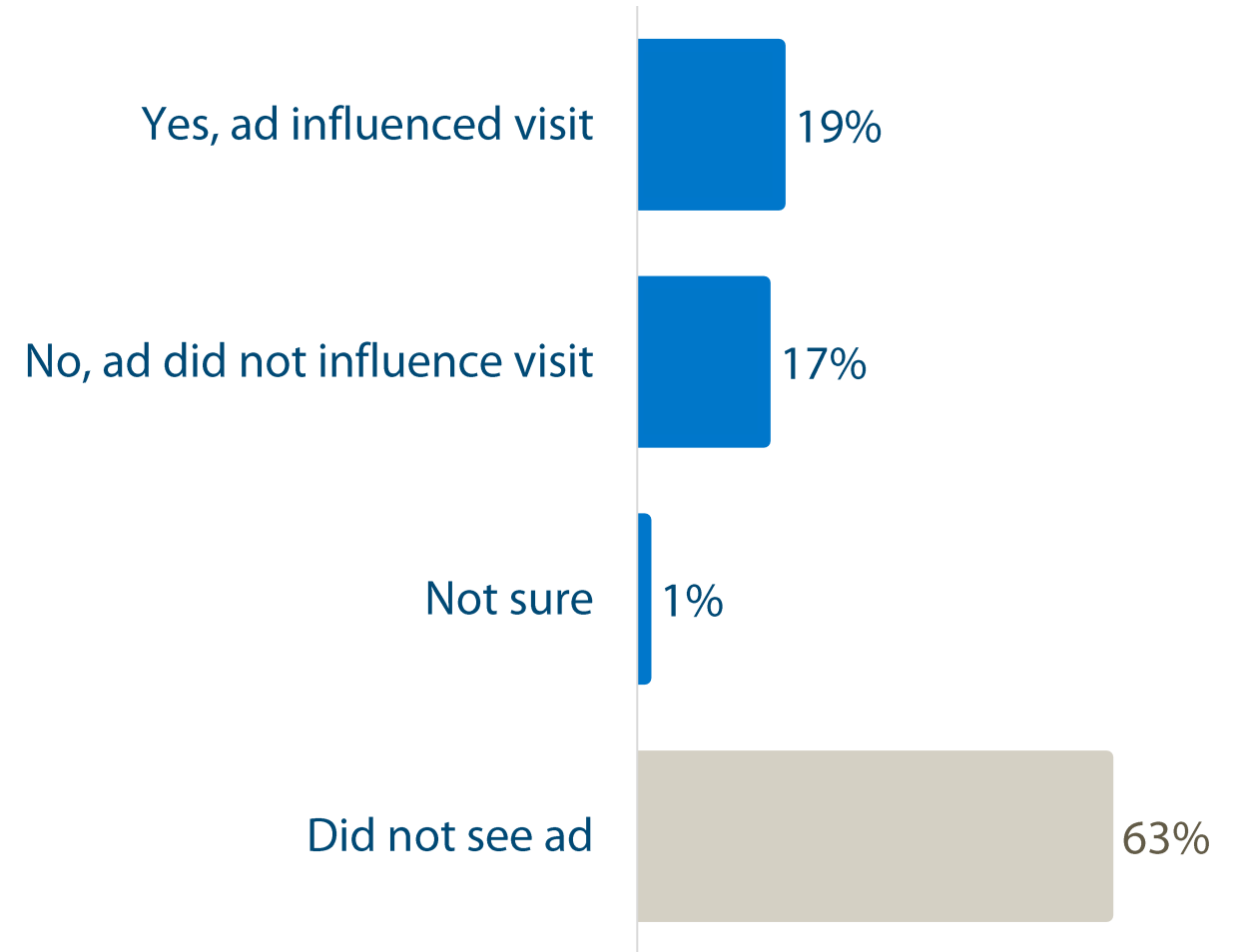
- Of the **37%** of visitors who **recalled advertising** about the Pensacola area:
- » **Nearly 2 in 5** visitors noticed advertising on **VisitPensacola.com**
 - » **Over 1 in 4** visitors noticed advertising on **personal social media**
 - » **1 in 4** visitors noticed advertising on **television**
 - » **Other online sources** such as apps, online articles, and travel websites contribute to overall destination awareness

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



¹ Multiple responses permitted.

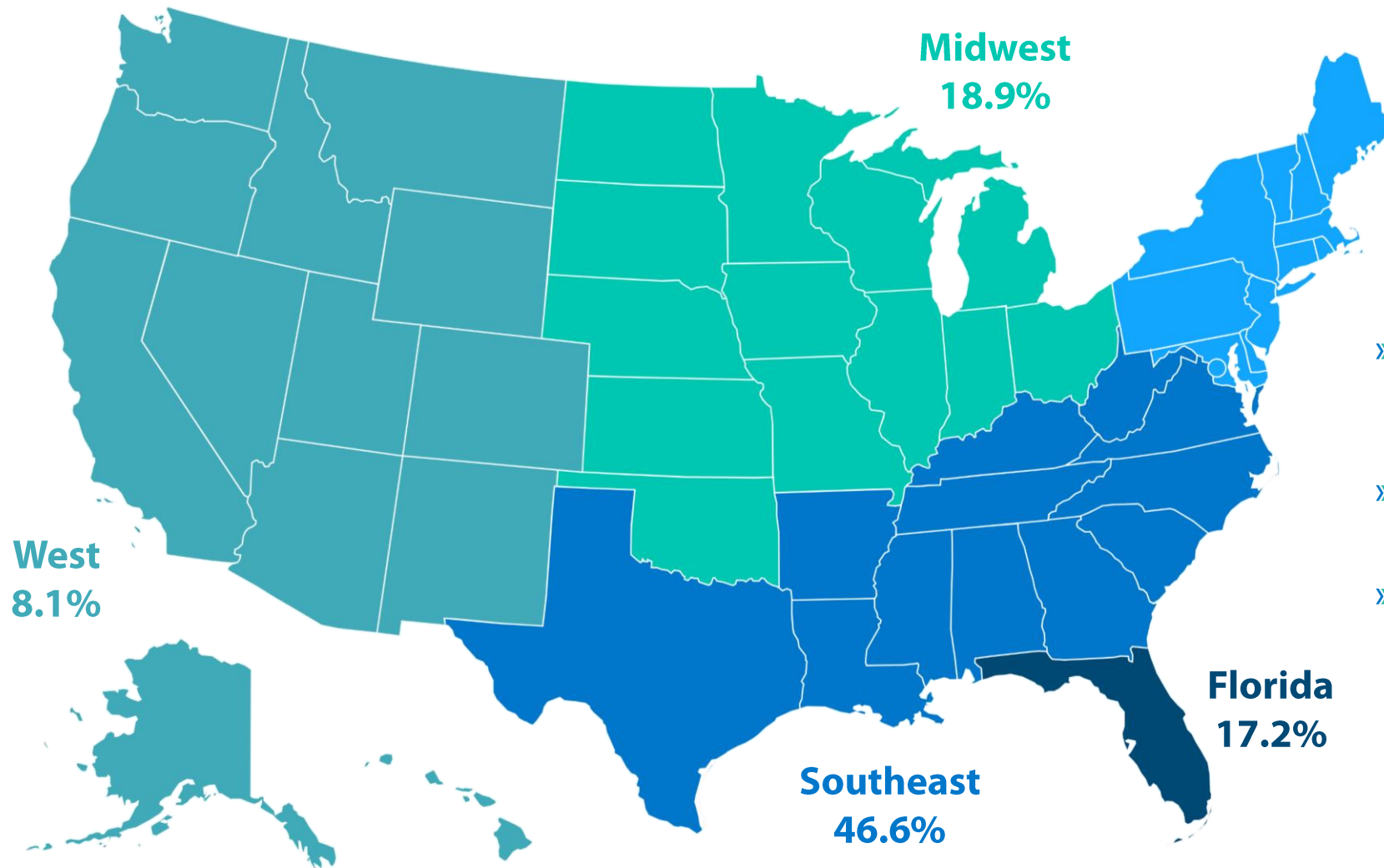
» **19%** of **all visitors** were influenced by an ad to visit the Pensacola area (16% in 2024)



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.

VISITOR JOURNEY: TRAVEL PARTY PROFILE

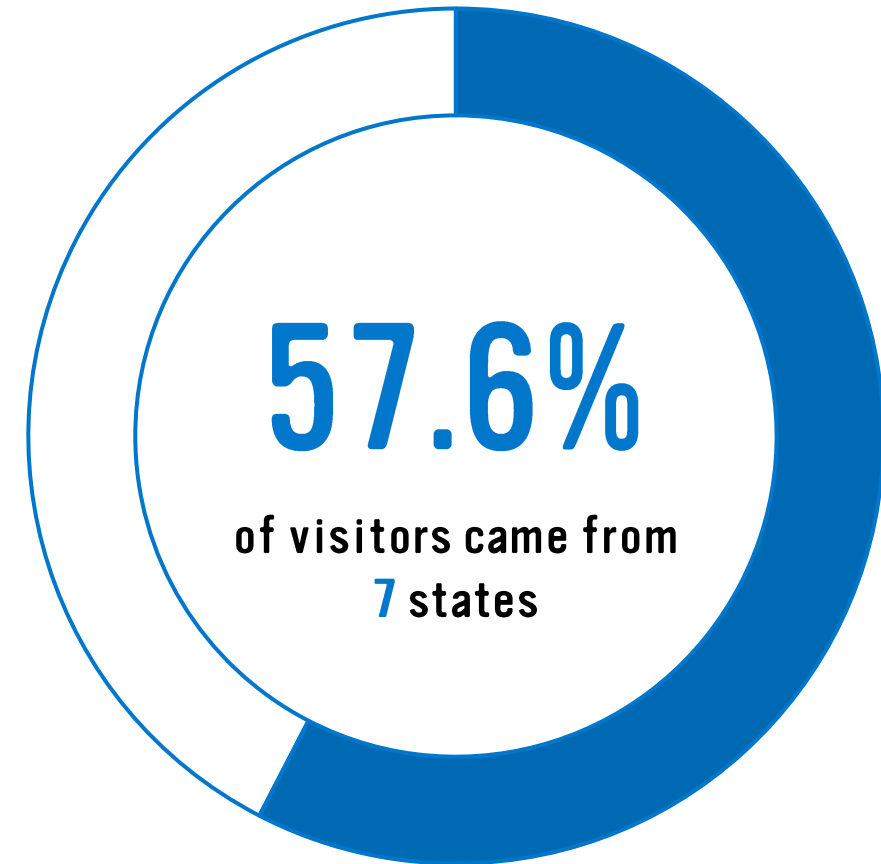




- » **Over 3 in 5** visitors traveled to the Pensacola area from the **Southeast**, including **Florida**
- » **2.1%** of visitors traveled to the Pensacola area from **outside of the U.S.**
- » The majority of international visitors came from Ontario (0.4%), the Netherlands (0.4%), the United Kingdom (0.1%), British Columbia (0.1%), and Quebec (0.1%).

¹ Sources: Zartico and Visitor Tracking Study.

STATE	2024	2025
Florida	16.6%	17.2%
Alabama	15.1%	14.3%
Texas	6.8%	7.0%
Georgia	5.9%	5.3%
Louisiana	5.0%	5.0%
Tennessee	6.3%	4.8%
Mississippi	4.9%	4.0%



¹ Sources: Zartico and Visitor Tracking Study.

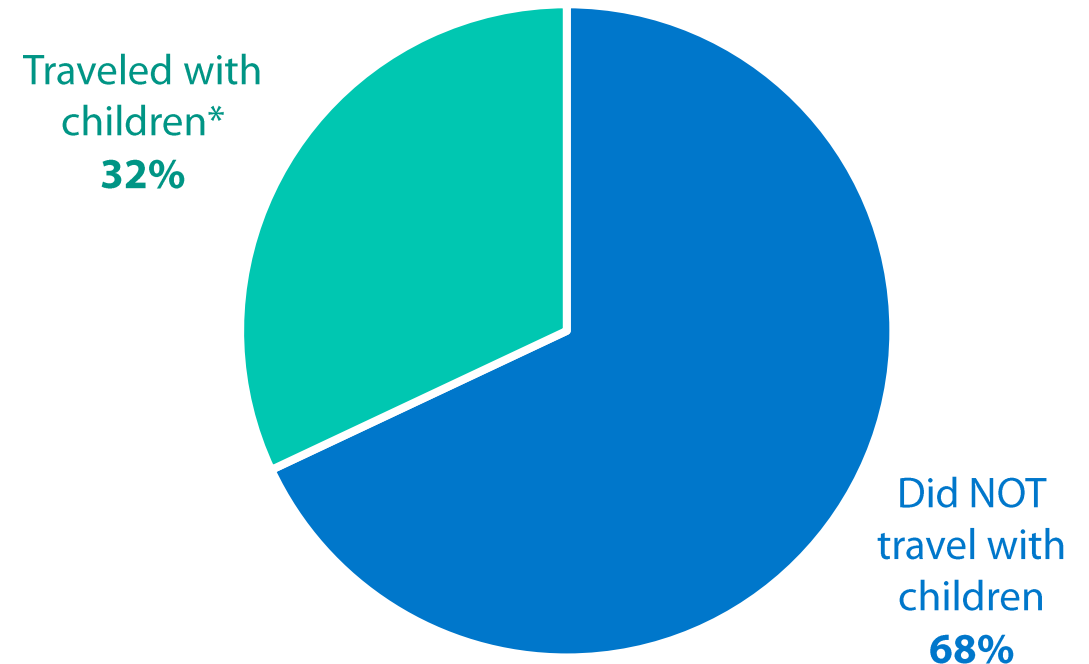
TOP MARKETS	2024	2025
Mobile ²	15.2%	16.9%
Atlanta	4.3%	4.2%
New Orleans	2.7%	3.4%
Birmingham	3.2%	3.4%
Dallas – Fort Worth	2.0%	2.7%
Nashville	3.3%	2.7%
Houston	1.9%	1.7%
Orlando – Daytona Beach – Melbourne	1.7%	1.5%

- » **Mobile²** continues to be the top DMA for the Pensacola area
- » **36.4%** of visitors traveled from **8** market areas

¹ Sources: Zartico and Visitor Tracking Study.

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

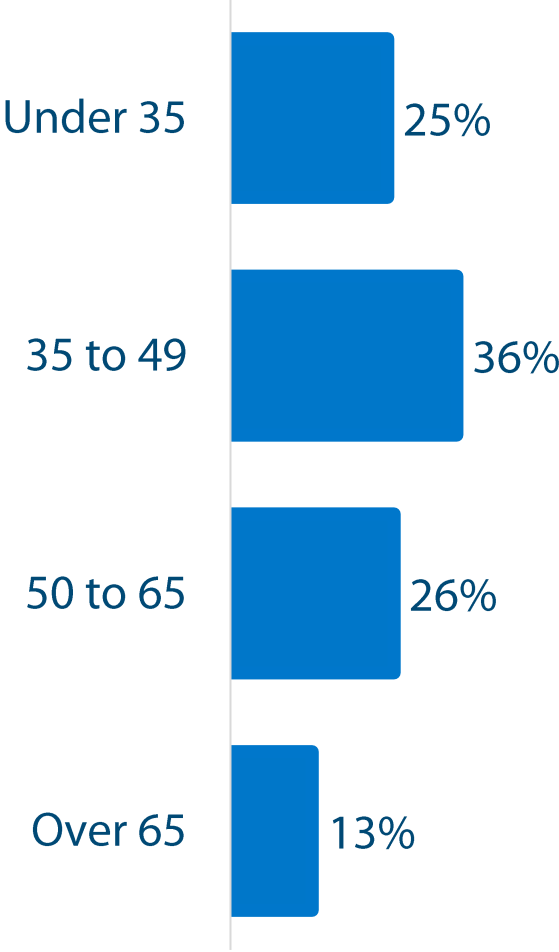
- » For **all visitors**¹, the typical **travel party size** was **2.5** (2.6 in 2024)
- » The typical **travel party size** for visitors staying in **paid accommodations** was **2.6** (2.8 in 2024)
- » **Majority** of travel parties did not include **children under the age of 20** (67% in 2024)



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

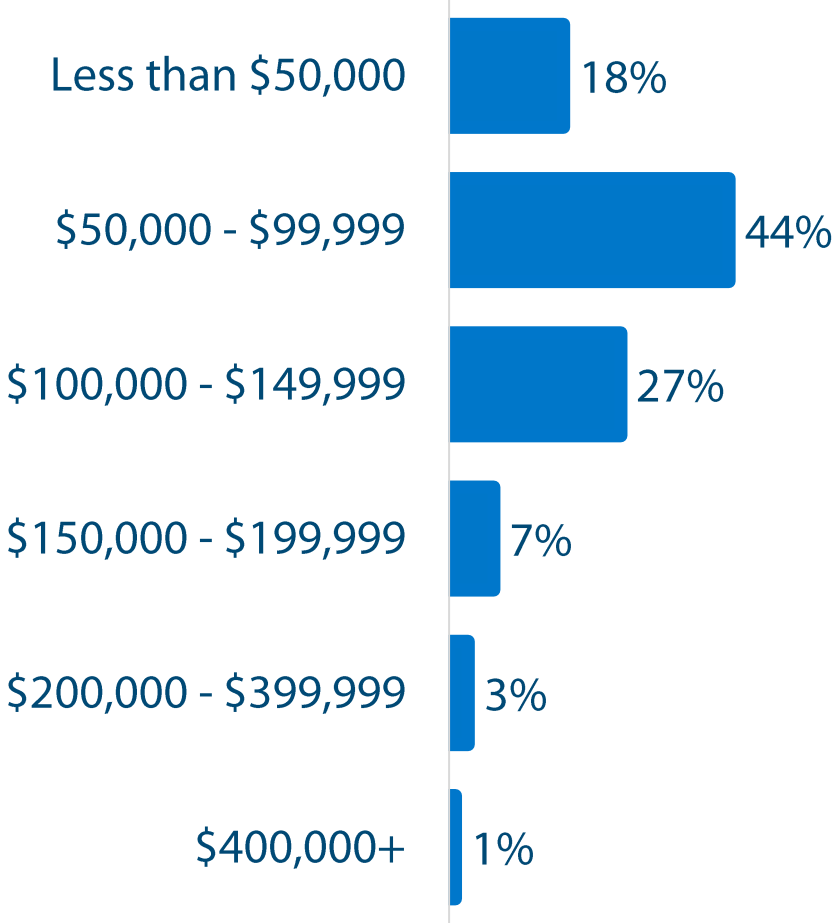
*Children are considered people under the age of 20

» The median **age**¹ of visitors to the Pensacola area was **45** (46 in 2024)

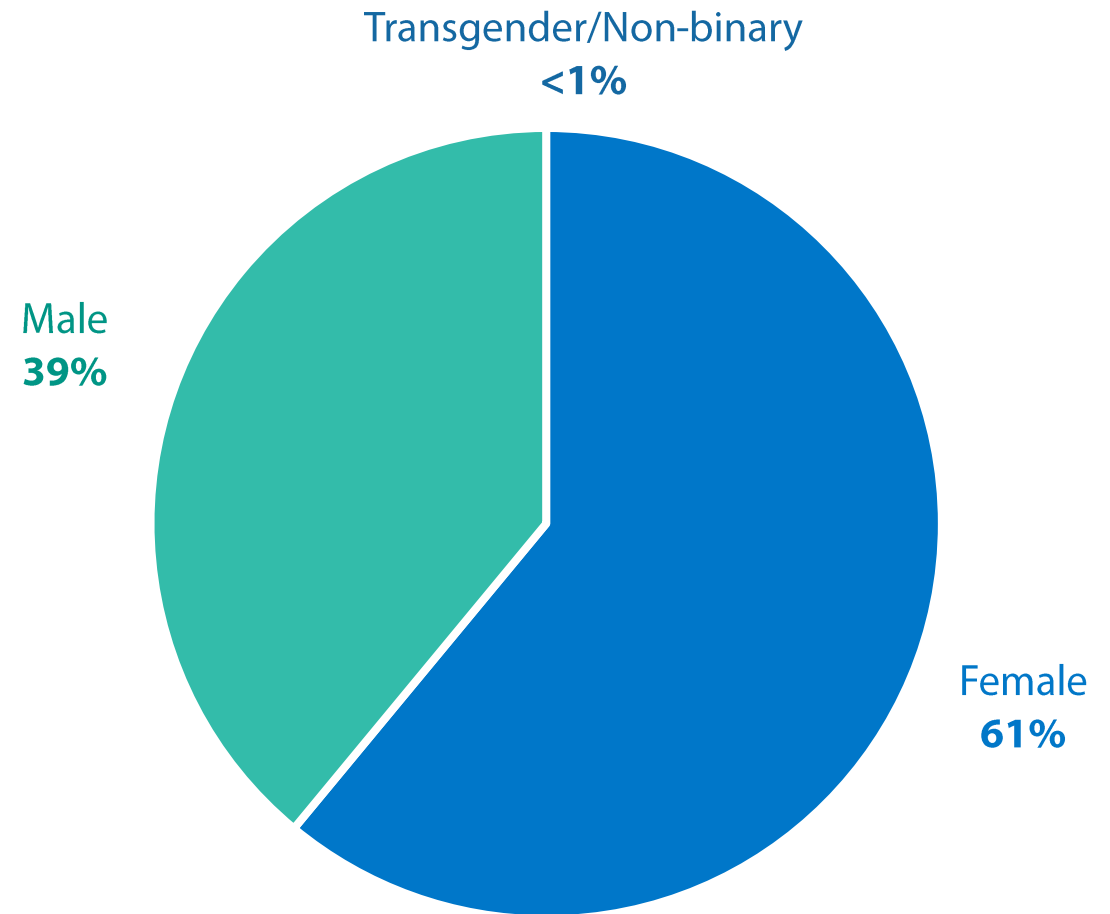


¹Age of member of travel party surveyed.
The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

- » Visitors to the Pensacola area had a **median household income** of **\$86,400** per year (\$85,900 in 2024)
- » **11%** of visitors had household incomes **over \$150,000**
- » **62%** of visitors had household incomes **below \$100,000**

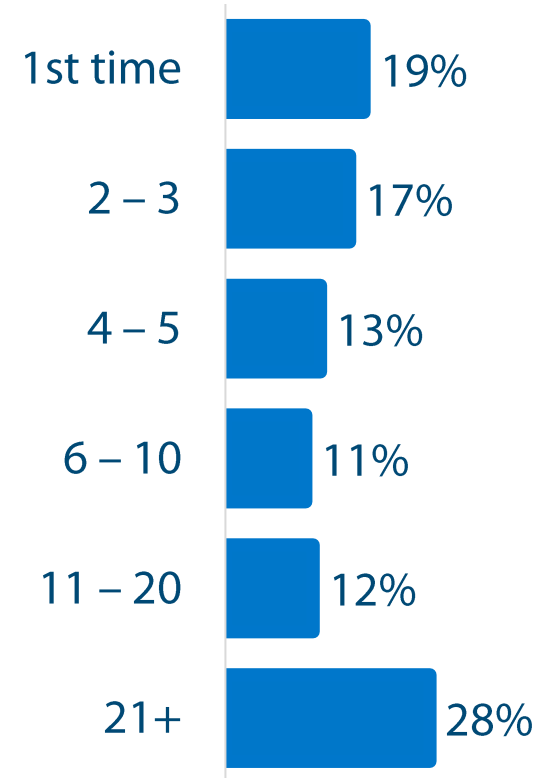


» 61% of visitors interviewed were **female**¹
(62% in 2024)



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.

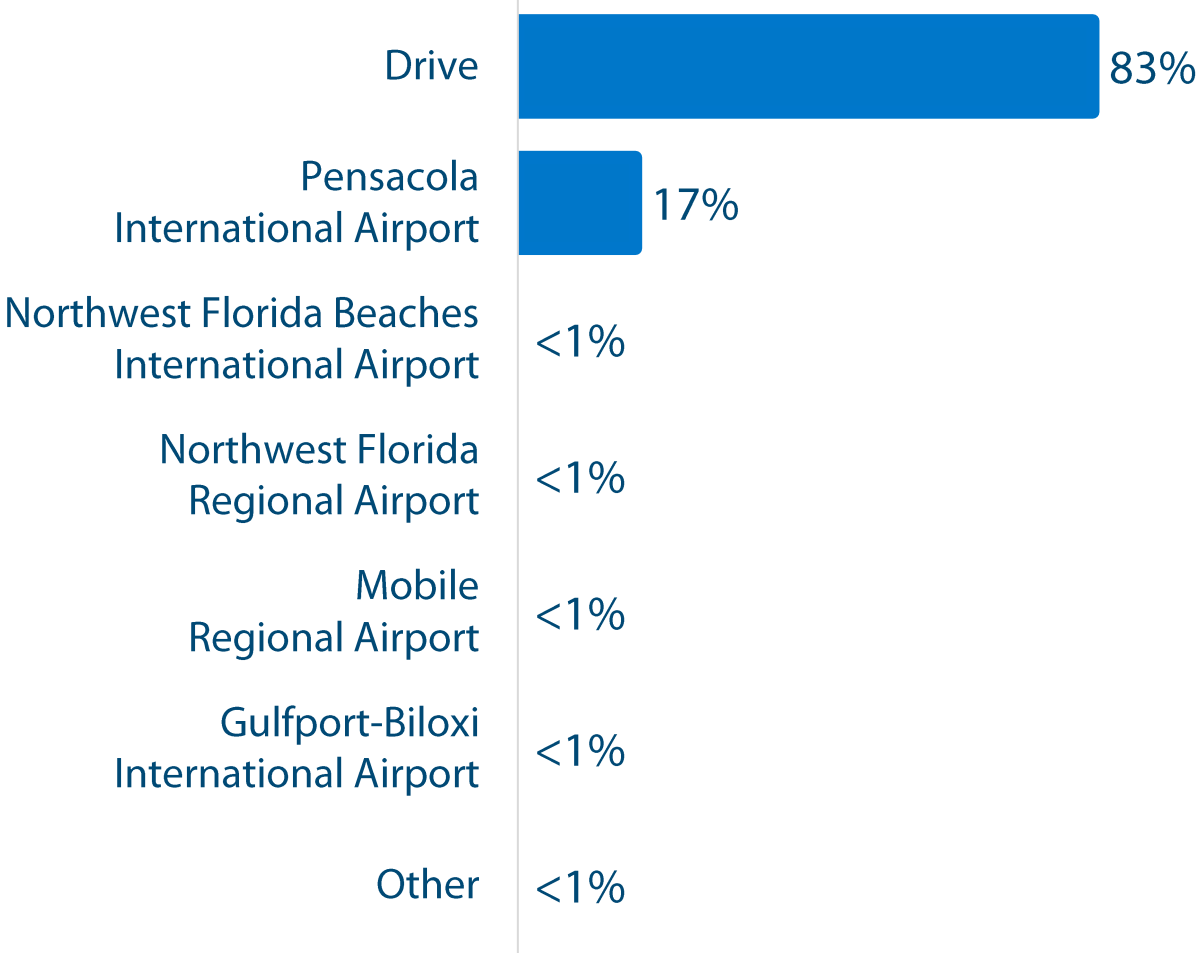
- » **Nearly 1 in 5** visitors were visiting the Pensacola area for the **first time** (25% in 2024)
- » **40%** of visitors are loyalists, having **visited the Pensacola area over 10 times** (30% in 2024)



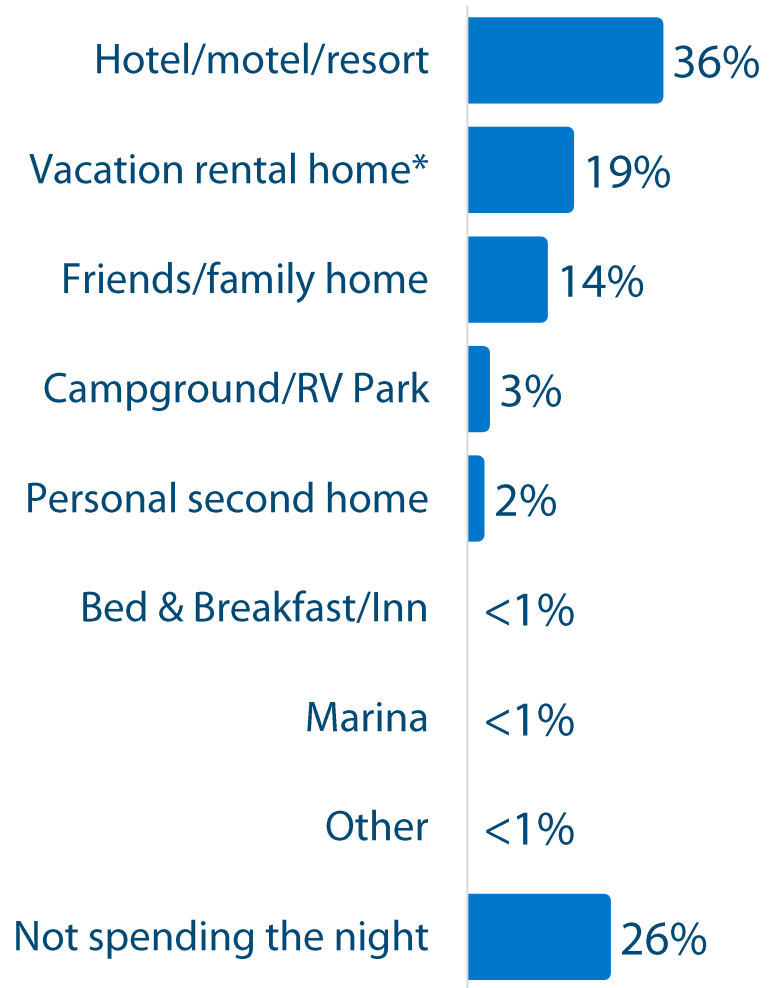
VISITOR JOURNEY: TRIP EXPERIENCE



- » **Over 4 in 5** visitors **drove** to the Pensacola area for their trip (84% in 2024)
- » **17%** of visitors used the **Pensacola International Airport** (15% in 2024)



- » Over 1 in 3 visitors stayed overnight in a hotel, motel, or resort (33% in 2024)
- » The typical visitor¹ stayed 4.0 nights in Pensacola area (4.5 in 2024)
- » Visitors staying in paid accommodations² stayed an average of 4.7 nights in the Pensacola area (5.1 in 2024)

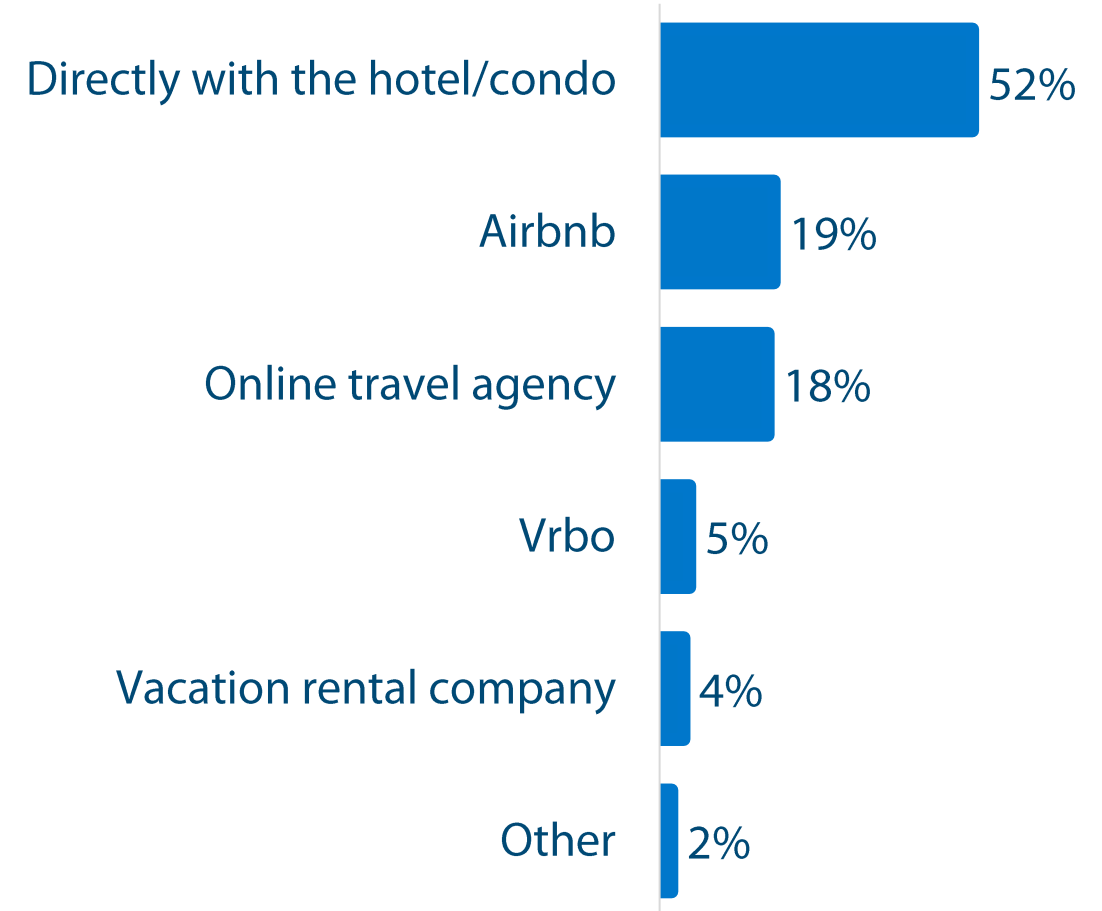


¹ Visitors staying in paid accommodations, nonpaid accommodations, and day trippers.

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

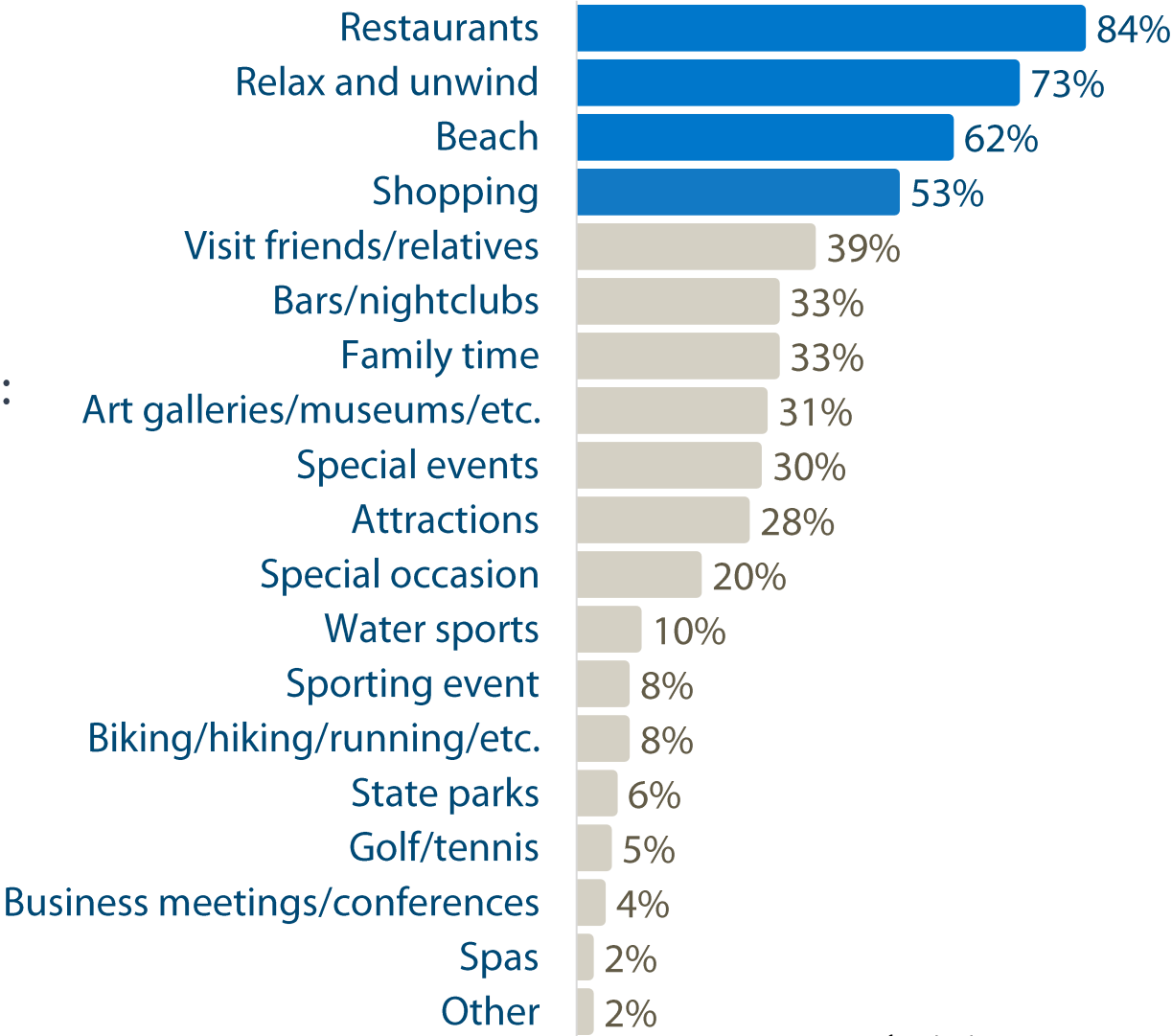
*Includes Airbnb, Vrbo, etc.

- » **Over half** of visitors booked their trip to the Pensacola area **directly with the hotel/condo** (51% in 2024)
- » **19%** of visitors booked through **Airbnb** (21% in 2024) or an **online travel agency** (19% in 2024)



Top activities enjoyed by visitors this quarter include:

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

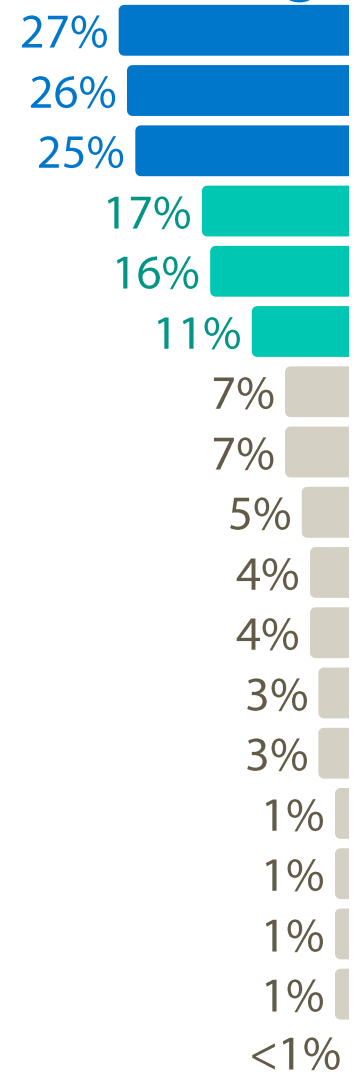


¹ Multiple responses permitted.

ACTIVITIES V. REASON FOR VISIT

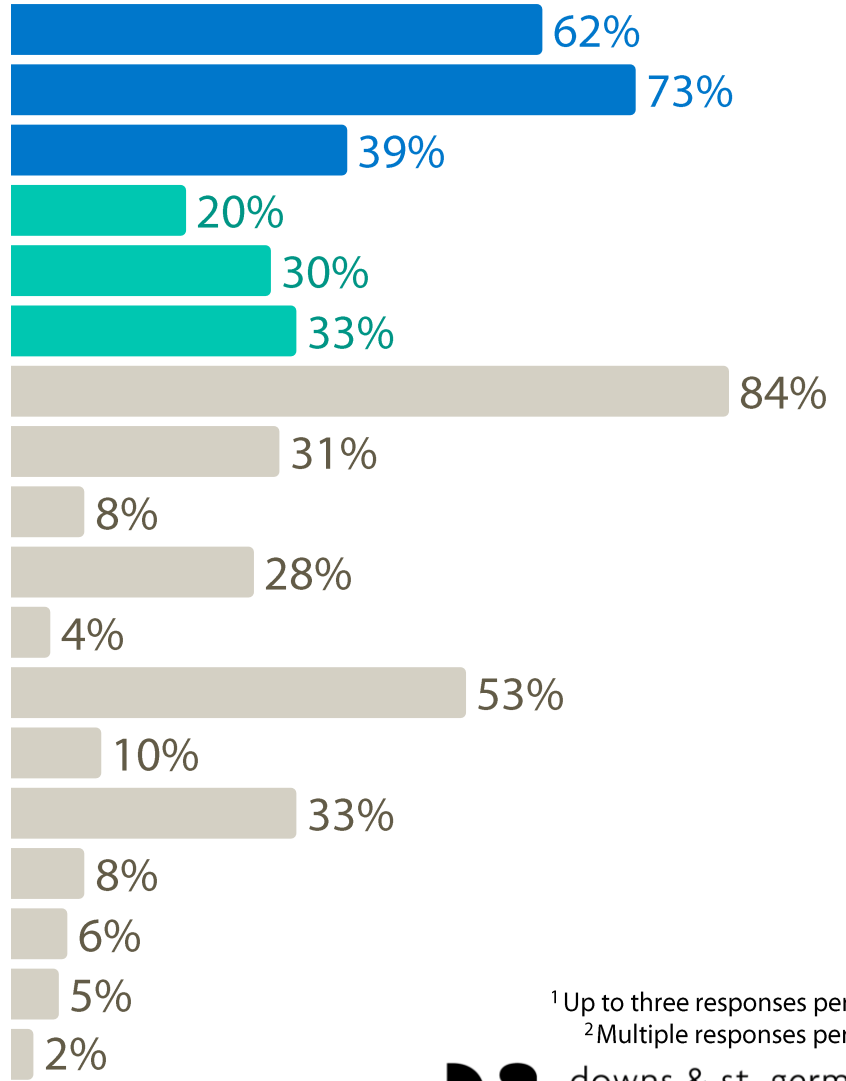
OCTOBER TO DECEMBER 2025

Reason for Visiting¹

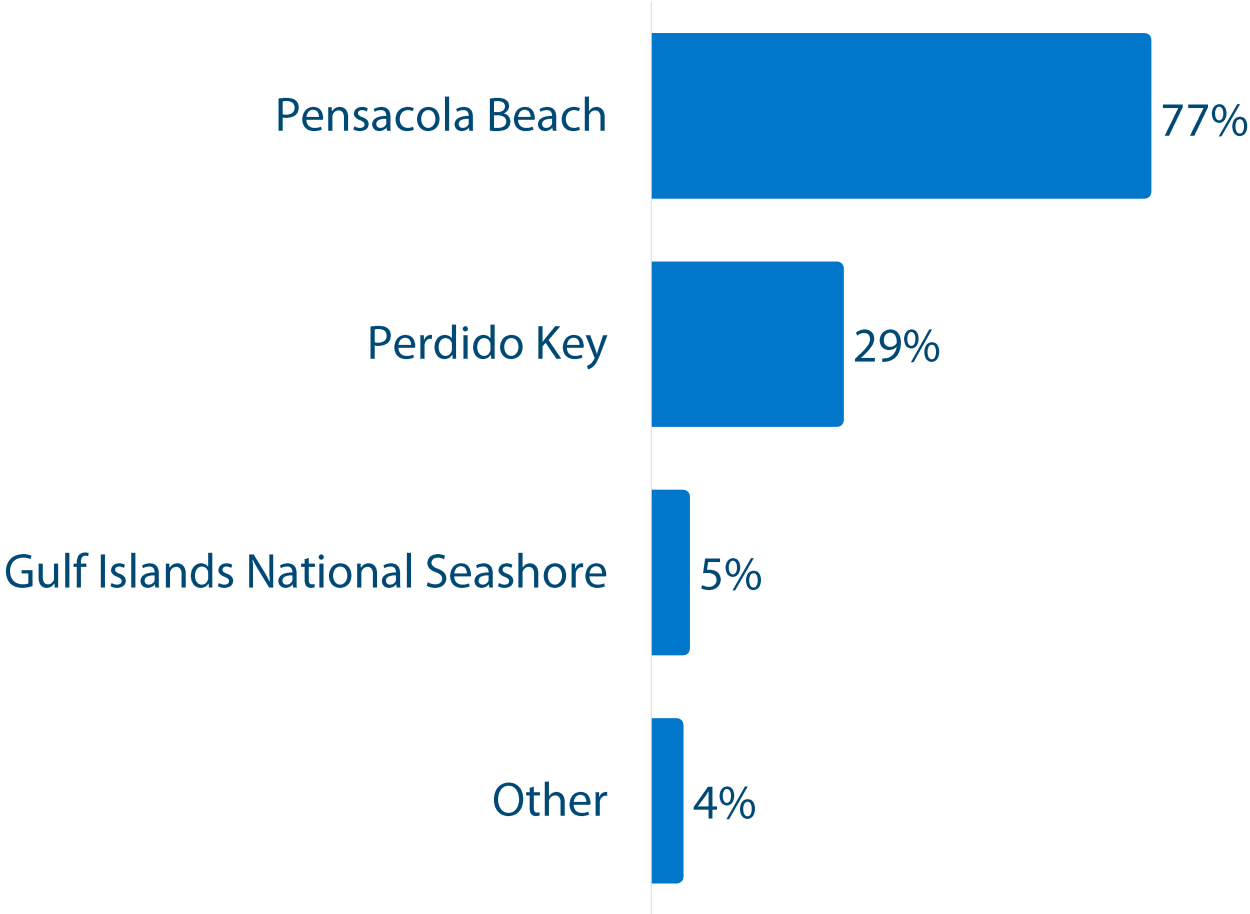


Beach
Relax and unwind
Visit friends/relatives
Special occasion
Special events
Family time
Restaurants
Art galleries, museums, etc.
Sporting event
Attractions
Business meetings/conferences
Shopping
Water sports
Bars/nightclubs
Biking, hiking, running, etc.
State parks
Golf/tennis
Spas

Visitor Activities²



- » **Over 3 in 4** visitors who visited the beach went to **Pensacola Beach**
- » **Nearly 1 in 5** visited **Perdido Key**

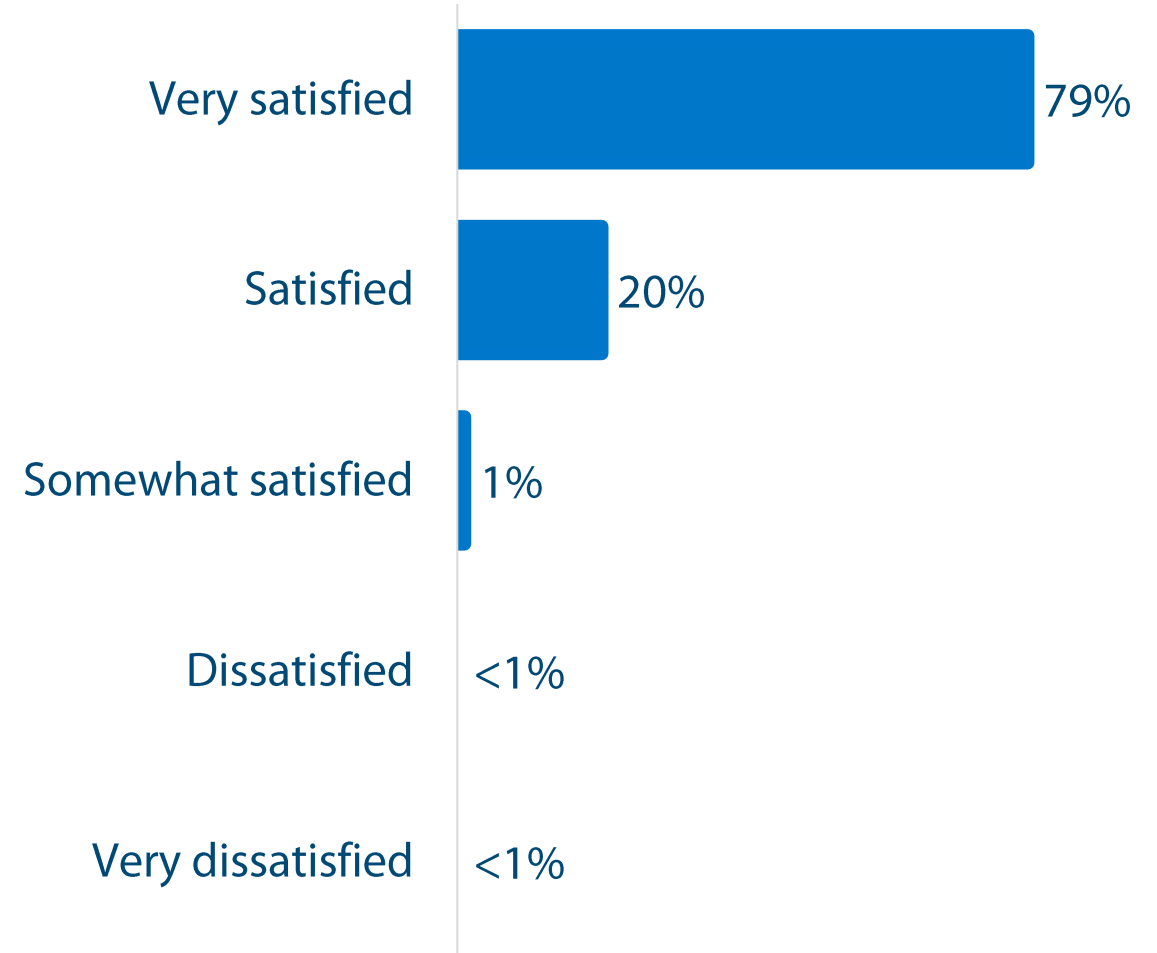


¹ Multiple responses permitted.

VISITOR JOURNEY: POST TRIP EVALUATION

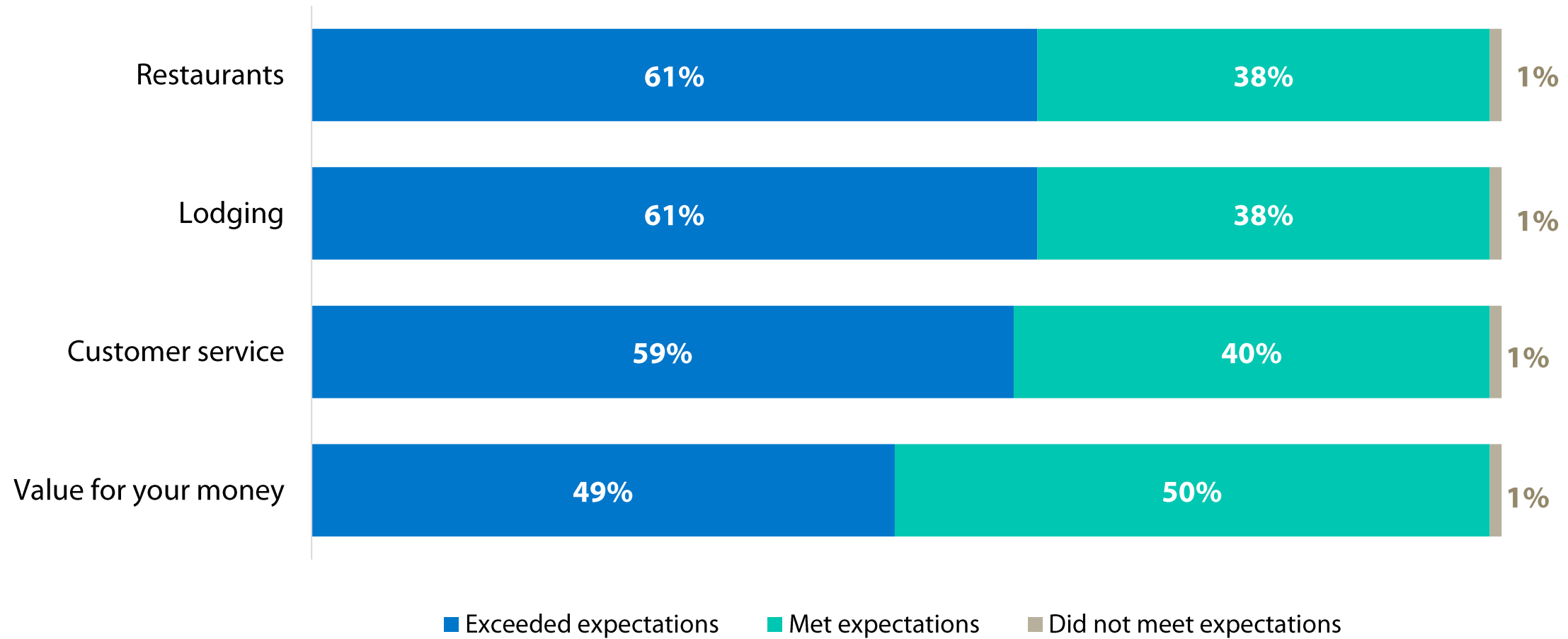


- » **Nearly 4 in 5** visitors were **very satisfied** with their trip to the Pensacola area (**77% in 2024**)
- » Those who said somewhat satisfied, dissatisfied, or very dissatisfied were asked what features they liked least about the area, which included: high prices, traffic, and customer service

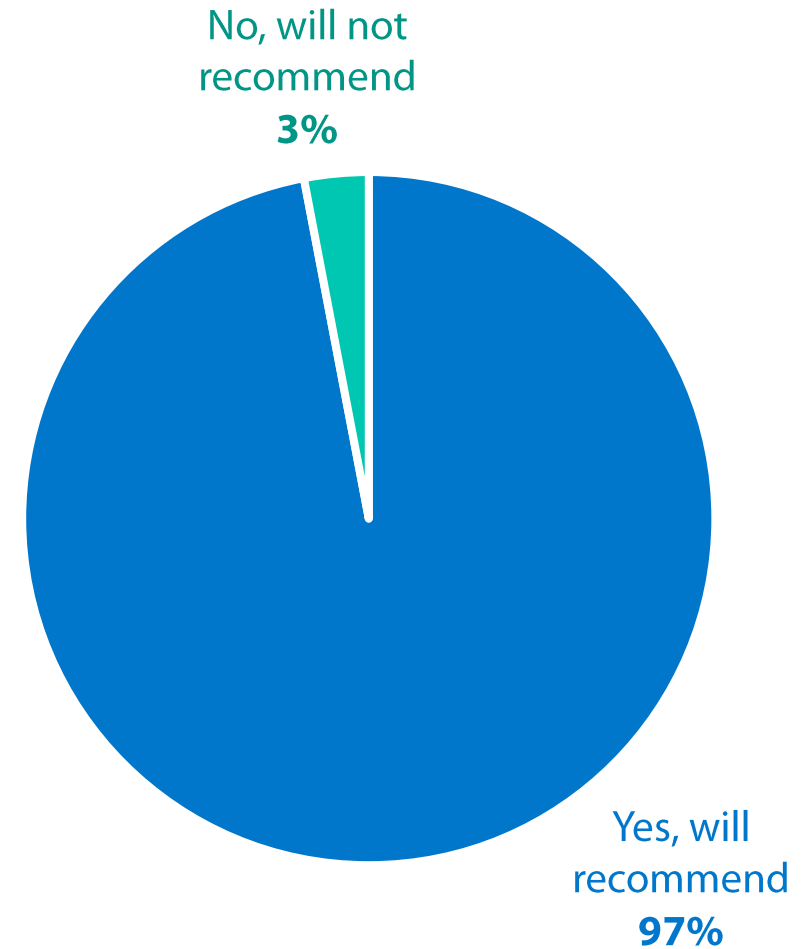


SATISFACTION RATINGS

OCTOBER TO DECEMBER 2025



» **Almost all** visitors would recommend the Pensacola area to others (96% in 2024)



- » **99%** of visitors would **return** to the Pensacola area (99% in 2024)
- » **3 in 4** visitors would **definitely return** to the Pensacola area (74% in 2024)



VISIT PENSACOLA

VISITOR TRACKING STUDY

OCTOBER – DECEMBER 2025

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

