

VISIT PENSACOLA

Visitor Tracking Study
October - December 2023



STUDY OBJECTIVES: VISITOR JOURNEY



- Planning cycle
- Planning sources
- Reasons for visiting
- Exposure to destination messaging

- Visitor origin
- Party size
- Party composition
- Demographics
- Number of visits to the area

- Mode of transportation
- Accommodations
- Booking
- Length of stay
- Activities in destination
- Visitor spending

- Satisfaction with the Pensacola area
- Likelihood of returning
- Evaluation of destination attributes
- Painting a picture for others

- Number of visitors
- Expenditures
- Room nights generated
- Occupancy, ADR, RevPAR

EXECUTIVE SUMMARY



QUARTERLY SNAPSHOT

OCTOBER - DECEMBER 2023

- » Although lodging metrics were down compared to Oct-Dec 2022 an increase in units as well as more Day Trippers and Visitors staying with friends and relatives resulted in a larger number of visitors and direct spending
- » Visitors had a shorter length of stay
- » More visitors noted that their **expectations were exceeded (customer service +7%, value of money +4%, lodging +3% and restaurants +2%)** compared to 2022



517,100

TOTAL
VISITORS

↑ 1.6%



509,722

ROOM
NIGHTS

↑ 2.7%



\$276,355,900

DIRECT
SPENDING

↑ 6.1%



\$4,254,636

TOURISM
DEVELOPMENT TAX

↑ 1.7%

vs. 2022

VISITOR JOURNEY: ECONOMIC IMPACT



TOURISM SNAPSHOT: METRICS

	October - December 2022	October - December 2023	% Δ
Occupancy ¹	51.7%	49.9%	-3.4%
ADR ¹	\$132.91	\$126.76	-4.6%
RevPAR	\$68.75	\$63.31	-7.9%
Room Nights	496,586	509,772	+2.7%
TDT ²	\$4,182,231	\$4,254,636	+1.7%

	October - December 2022	October - December 2023	% Δ
Visitors ³	509,200	517,100	+1.6%
Direct Spending	\$260,430,700	\$276,355,900	+6.1%

¹ Sources: Key Data and Smith Travel Research.

² Source: Clerk & Comptroller Escambia County.

³ Compared to 2022, there were more units available. However, the occupancy rate was lower and there were more day trippers/ VFRs, resulting in an increased number of visitors.

VISITOR JOURNEY: PRE-VISIT



TRIP PLANNING CYCLE

- » Many visitors to Pensacola have short planning windows, as nearly **3 in 5** visitors planned their trip to the Pensacola area **a month or less in advance** (57% in 2022)
- » Average trip planning cycle began **54 days** before the trip (56 days in 2022)



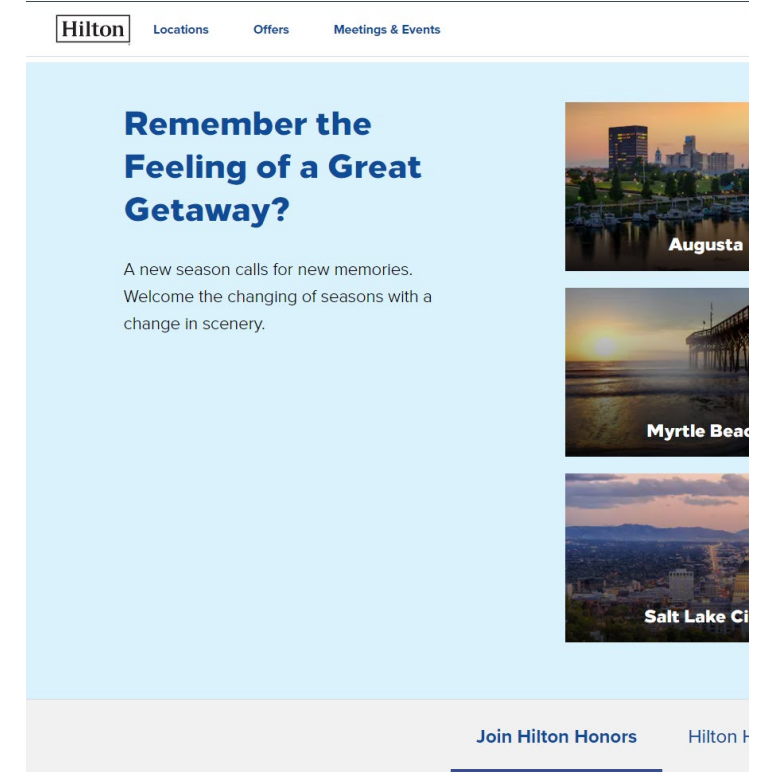
TOP TRIP PLANNING SOURCES¹



71% Search sites (Google, etc.)
(58% in 2022)



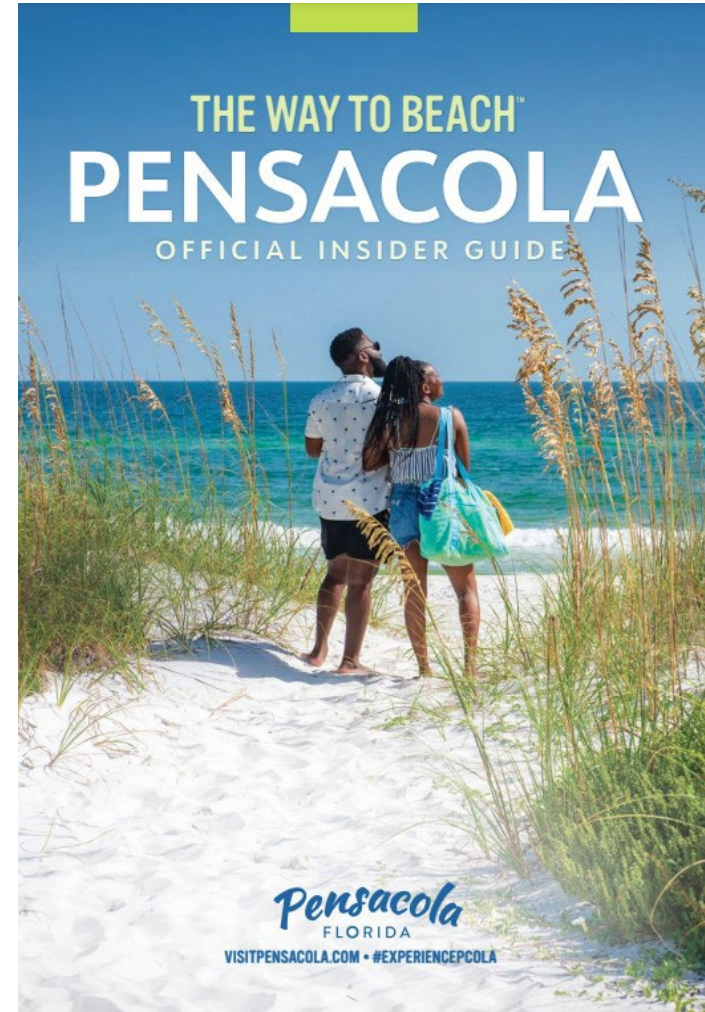
37% Friends/family
(34% in 2022)



21% Hotel websites/apps
(26% in 2022)

VISITOR GUIDE

- » **15%** of visitors requested or viewed the Pensacola Visitors Guide (**13% in 2022**)
- » Most visitors who use the Visitor Guide viewed it **online**



TOP REASONS FOR VISITING¹



26% Relax and unwind
(32% in 2022)



26% Visit friends/relatives
(25% in 2022)



23% Beach
(26% in 2022)

PRE-TRIP EXPOSURE TO ADVERTISING

- » **26%** of visitors have recently noticed advertising about the Pensacola area (**19%** in 2022)
- » This information influenced **10%** of all visitors to visit the Pensacola area (**8%** in 2022)



SOURCES OF ADVERTISING EXPOSURE¹

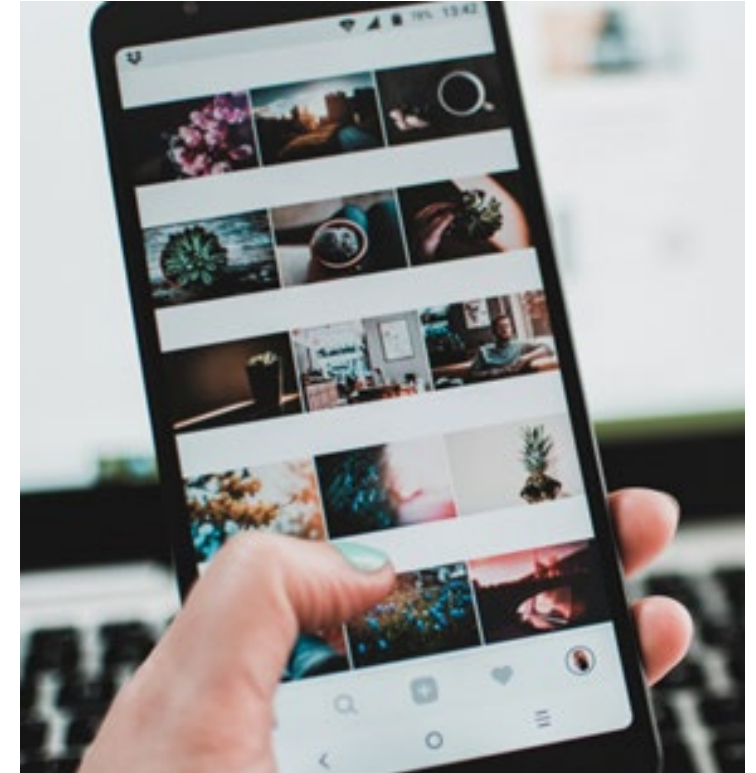
Base: 26% of visitors who noticed advertising



27% Television
(35% in 2022)



23% VisitPensacola.com
(12% in 2022)



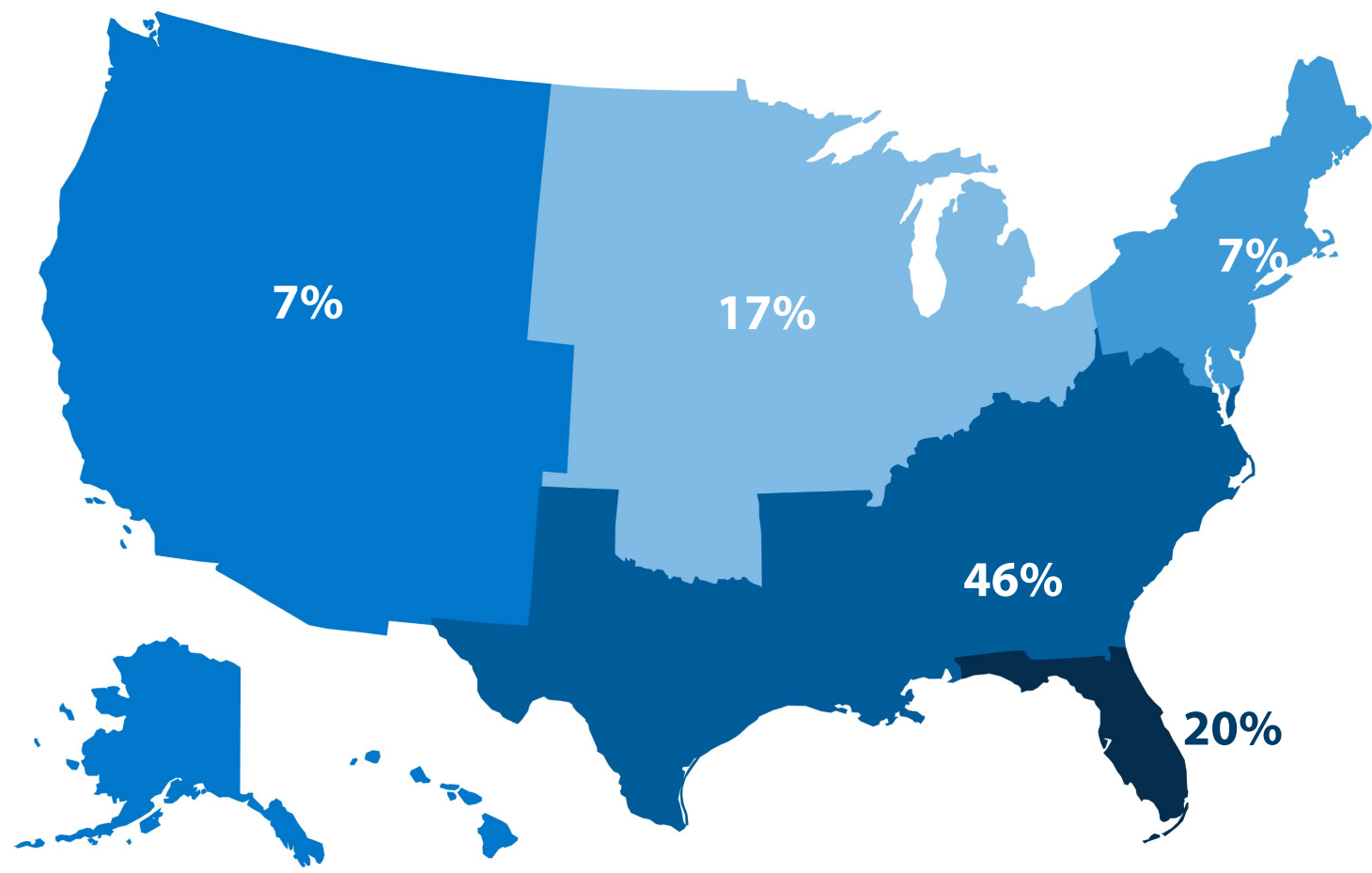
22% Personal social media
(25% in 2022)

VISITOR JOURNEY: TRAVEL PARTY PROFILE



REGIONS OF ORIGIN

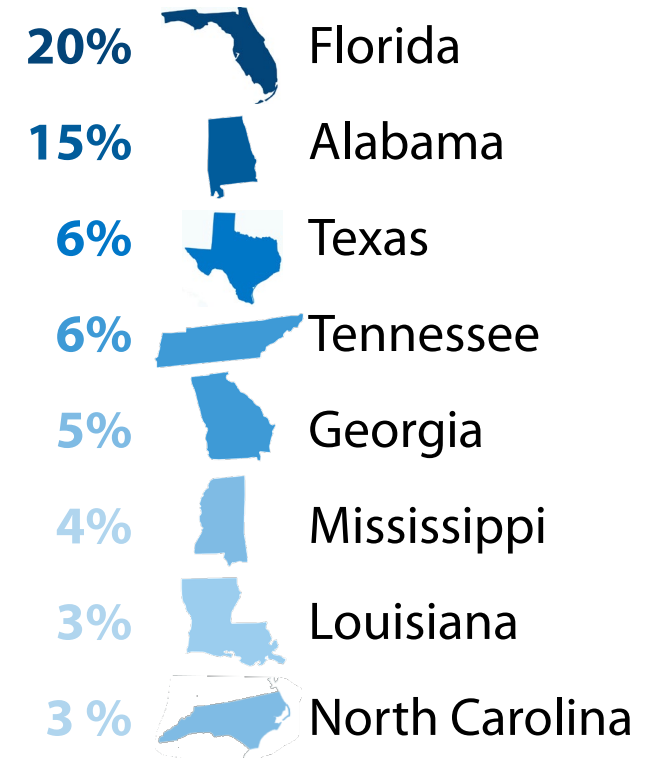
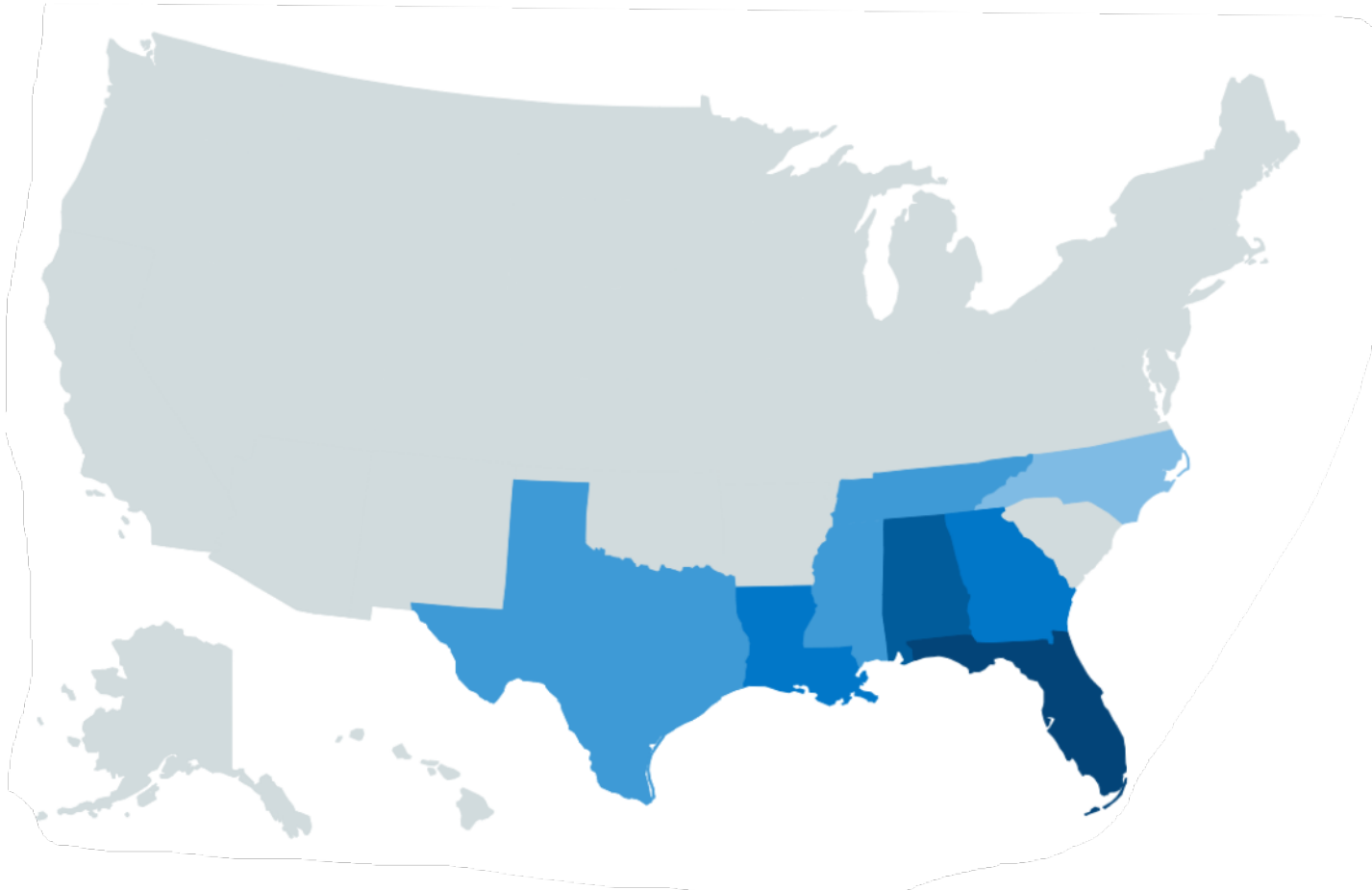
The southeast including Florida account for 2 in 3 visitors



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

TOP STATES OF ORIGIN

Over 3 in 5 visitors reside in 8 states



TOP MARKETS OF ORIGIN



21% Mobile¹
(16% in 2022)



4% Atlanta
(4% in 2022)



3% Nashville
(3% in 2022)



2% New Orleans
(2% in 2022)

¹ Mobile DMA spans across Florida, Alabama, and Mississippi.

TRAVEL PARTIES

- » The typical visitor traveled in a party composed of **2.8** people (2.7 in 2022)



- » **41%** traveled with at least one person under the age of 20 (29% in 2022)



VISITOR PROFILE

- » The typical Pensacola area Visitor:
 - » Is **45** years old (45 in 2022)
 - » Has a household income of **\$79,800** per year (\$87,500 in 2022)



NEW & RETURNING VISITORS

- » Over **1 in 5 visitors** were first time visitors to Pensacola area (**22% in 2022**)
- » **33%** of visitors were loyalists, having visited over 10 times (**26% 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 (14% in 2022)



OVERNIGHT VISITORS

- » **3 in 10** visitors stayed overnight in a **hotel, motel, or resort** (33% in 2022)
- » Typical visitors spent **4.5** nights in the Pensacola area (4.7 in 2022)



TOP ACCOMMODATIONS



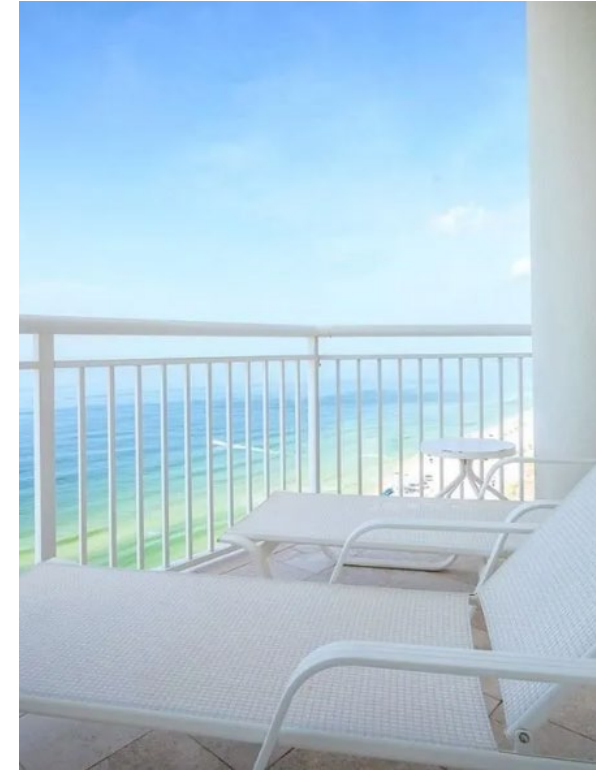
30% Hotel/Motel/Resort
(33% in 2022)



30% Day tripper
(28% in 2022)



18% Friends/family home
(16% in 2022)



15% Vacation rental home*
(16% in 2022)

*Includes Airbnb, VRBO, HomeAway, etc.

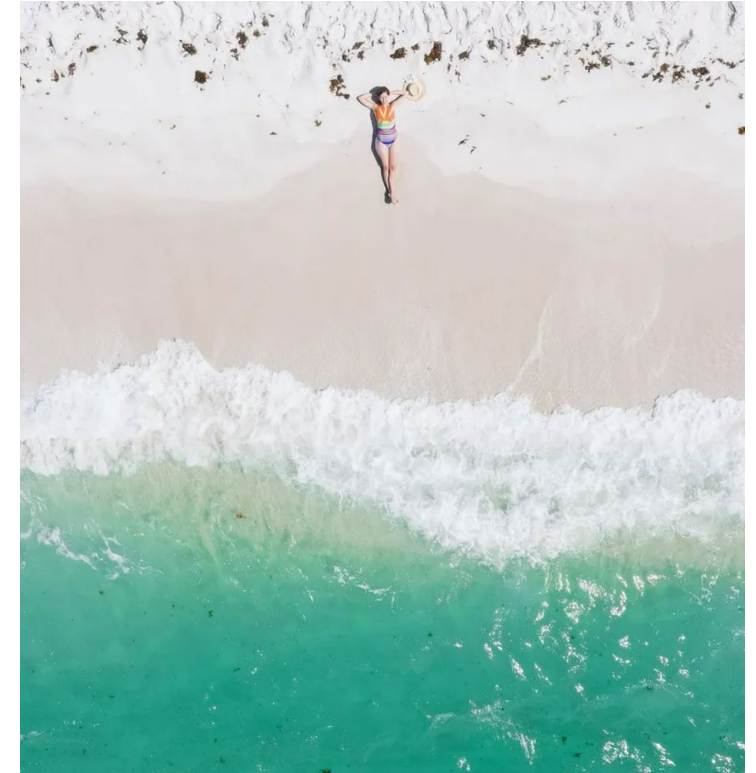
TOP ACTIVITIES DURING VISIT¹



80% Restaurants
(79% in 2022)



70% Relax and unwind
(72% in 2022)



60% Beach
(63% in 2022)

TRAVEL PARTY SPENDING

- » Travel parties spent **\$302** per day and **\$1,461** during their trip (\$255 per day and \$1,273 per trip in 2022)



VISITOR JOURNEY: POST-TRIP



VISITOR SATISFACTION

- » **99%** of visitors were **satisfied** with their trip to the Pensacola area (98% in 2022) – **76%** were **very satisfied** (75% in 2022)
- » **94%** of visitors would **recommend** the area to others (91% in 2022)
- » **99%** of visitors would **return** to the Pensacola area (98% in 2022) – **72%** would **definitely return** (77% in 2022)



SATISFACTION RATINGS

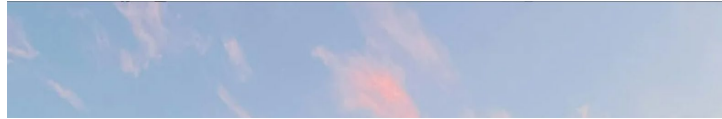
- » Around **2 in 3** visitors expressed that **lodging** (62% in 2022) **restaurants** (63% in 2022), and **customer service** (60% in 2022) exceeded expectations.
- » More than **half** of visitors expressed **value for their money** (52% in 2022), exceeded expectations



AREA DESCRIPTIONS*



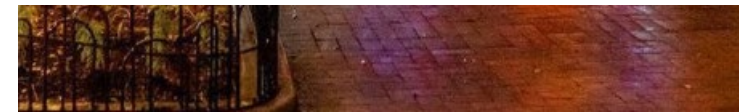
"My sister was kind enough to fly me down for a girl's weekend. It's been a lot of fun and it's a great girl's trip location."



"The beach is unbelievable, the whitest sand anyone has ever seen before and feels like sugar."



"Very beautiful. Festive downtown area and gorgeous beaches. Calming but fun."



*Open-ended responses. Multiple responses permitted.

DETAILED FINDINGS



VISITOR JOURNEY: ECONOMIC IMPACT



TOURISM SNAPSHOT: METRICS

	October - December 2022	October - December 2023	% Δ
Occupancy ¹	51.7%	49.9%	-3.4%
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VISITOR JOURNEY: PRE-VISIT



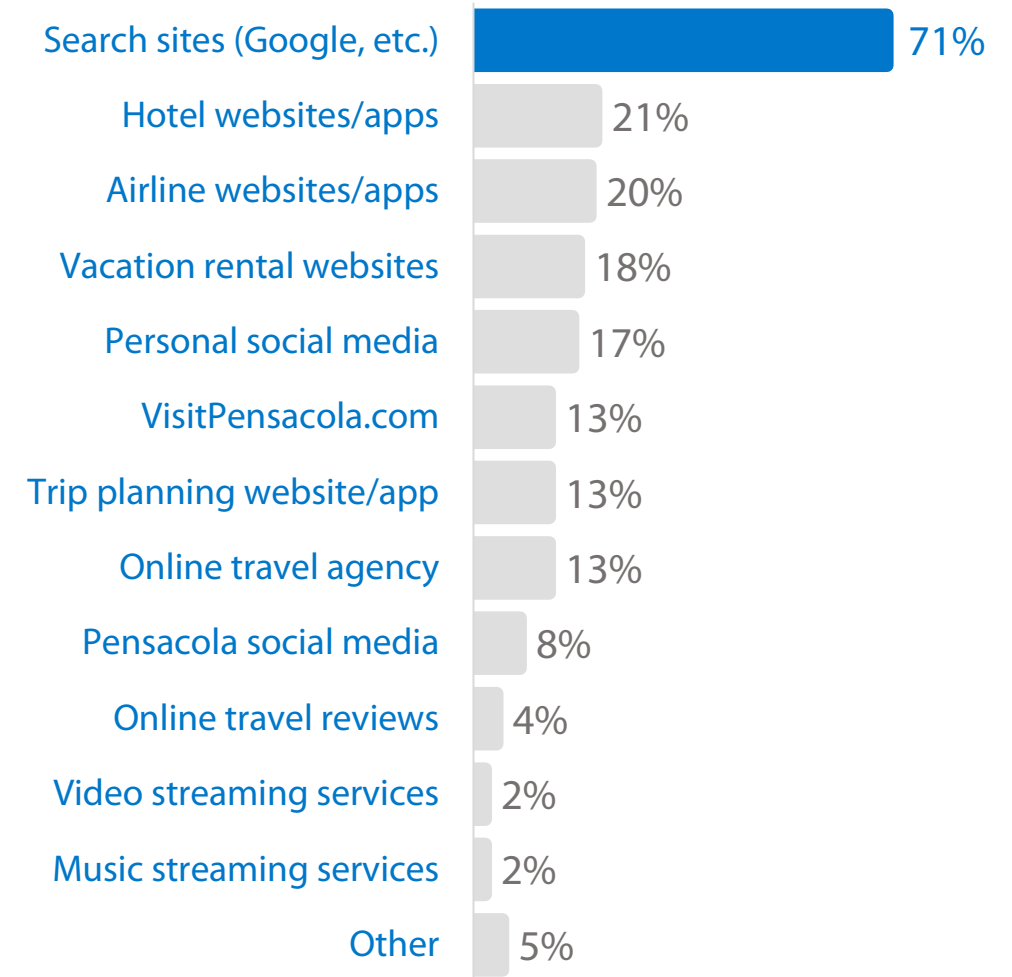
TRIP PLANNING CYCLE

- » Visitors to Pensacola have short trip planning windows, as nearly **3 in 5** visitors planned their trip to the Pensacola area **a month or less in advance** (57% in 2022)
- » On the other hand, over **1 in 4** visitors planned their trips at **least 3 months in advance**
- » Average trip planning cycle began **54 days** before the trip (56 days in 2022)



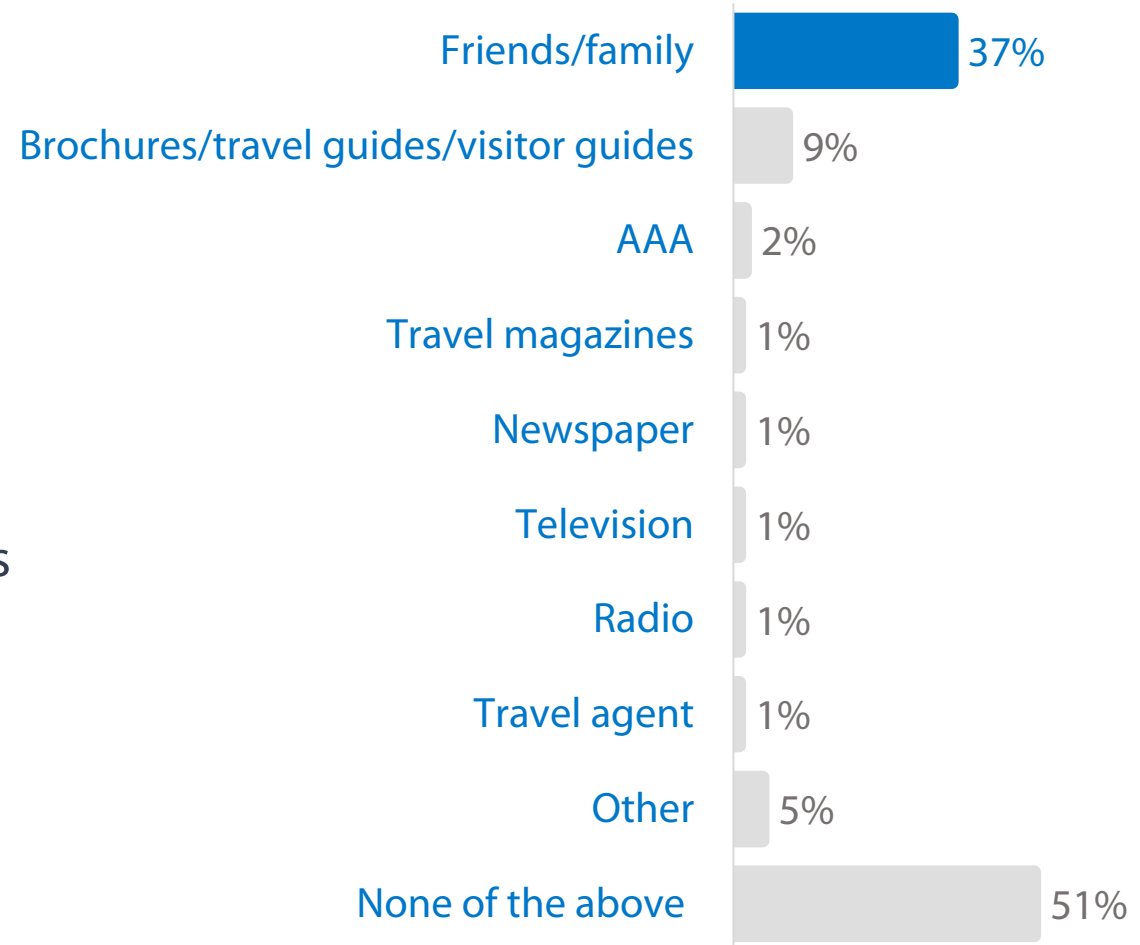
ONLINE TRIP PLANNING SOURCES¹

- » **Search sites such as Google** continue to be the **number one planning source** for trips to Pensacola
- » **Hotel website/apps** and **airline websites/apps** are **good advertising mediums** for Pensacola as about **1 in 5** visitors used this planning source
- » About **1 in 6** visitors used **personal social media** and **vacation rental websites** to plan their trip
- » **13%** of visitors used **VisitPensacola.com** to plan their trip



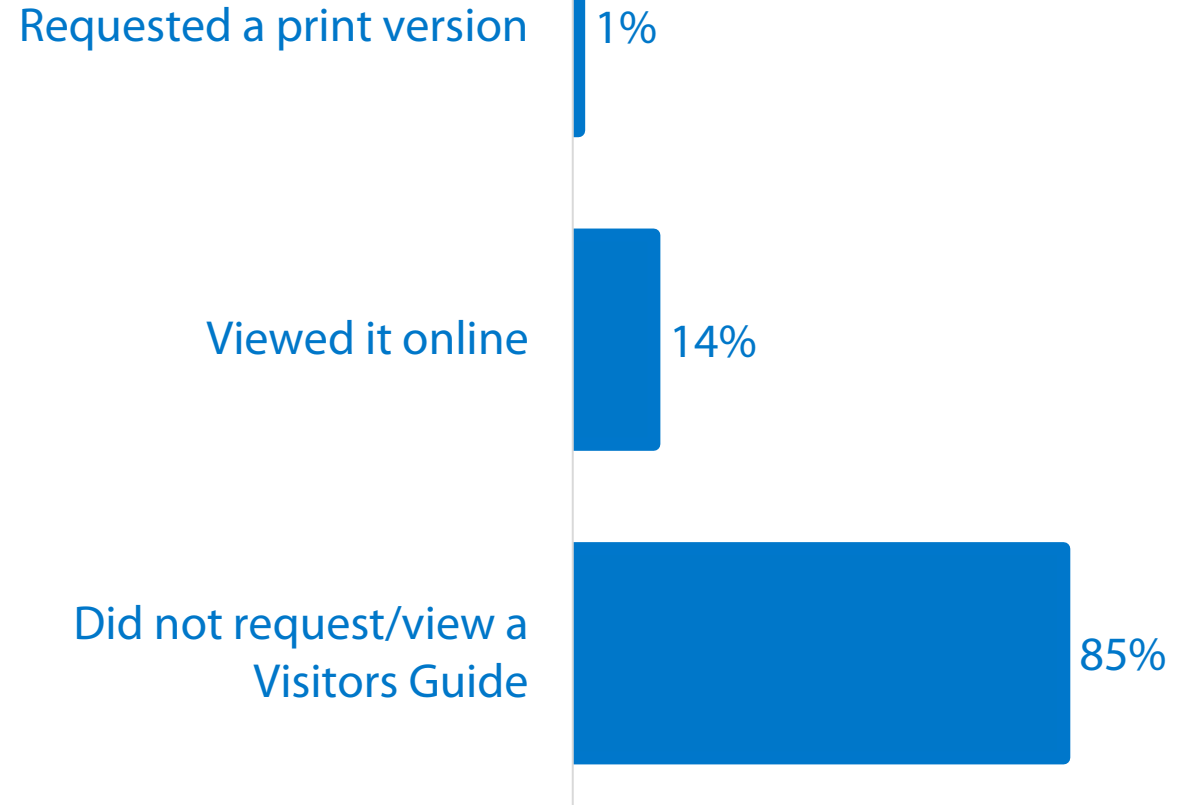
OTHER TRIP PLANNING SOURCES¹

- » Over **1 in 3** visitors planned their trip to the Pensacola area through **friends/family**
- » More **traditional planning sources** such as brochures followed distantly



VISITOR GUIDE

- » **14%** visitors requested or viewed the Pensacola Visitors Guide (13% in 2022)
- » **Online** consumption of the Pensacola Visitor Guide was over 14 times greater than print consumption



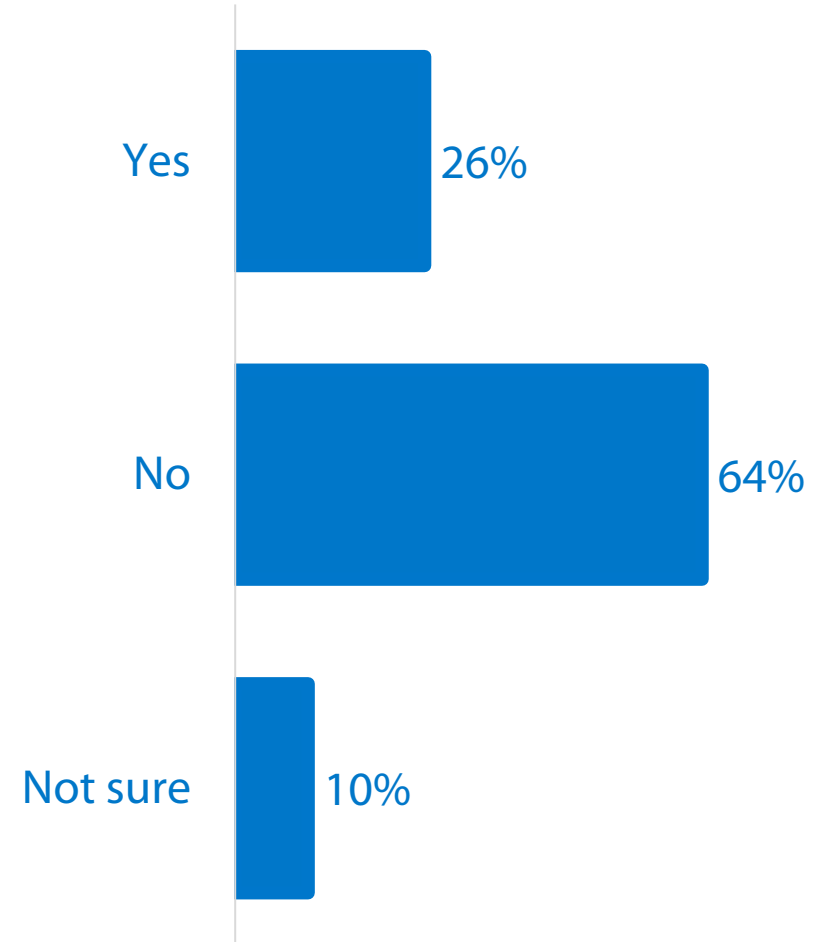
REASONS FOR VISITING¹

- » **Relaxation and visiting friends/family are the top** reasons for visiting as over **1 in 4** visitors came to Pensacola for this reason
- » About **1 in 4** visitors came for the **beach**



ADVERTISING

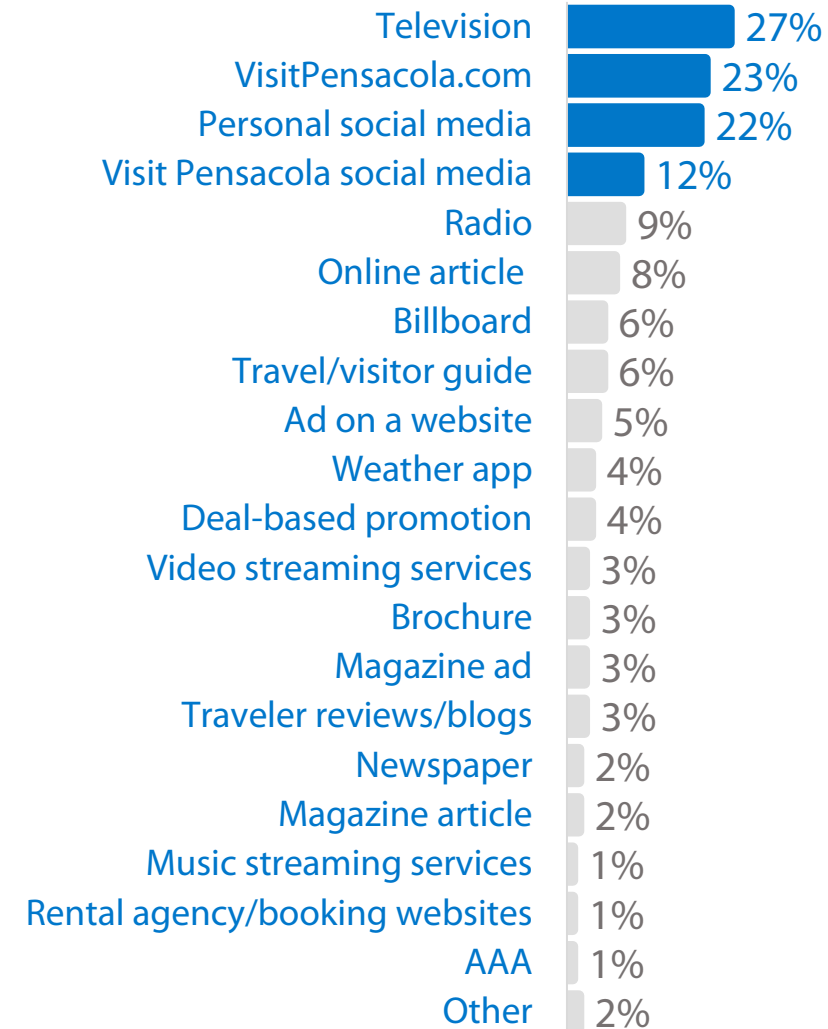
- » Over **1 in 4** visitors have recently noticed advertising about the Pensacola area (**19% in 2022**)
- » This information influenced **10%** of all visitors to visit the Pensacola area (**8% in 2022**)



ADVERTISING SOURCE¹

- » Over **1 in 4** who have recently seen advertising for the Pensacola area noticed it on **television**
- » **1 in 5** visitors who have recently seen advertising saw an advertisement on their **VisitPensacola.com** or **personal social media**
- » About **1 in 8** visitors noticed advertising on **Visit Pensacola social media**

Base: 26% of visitors who noticed advertising

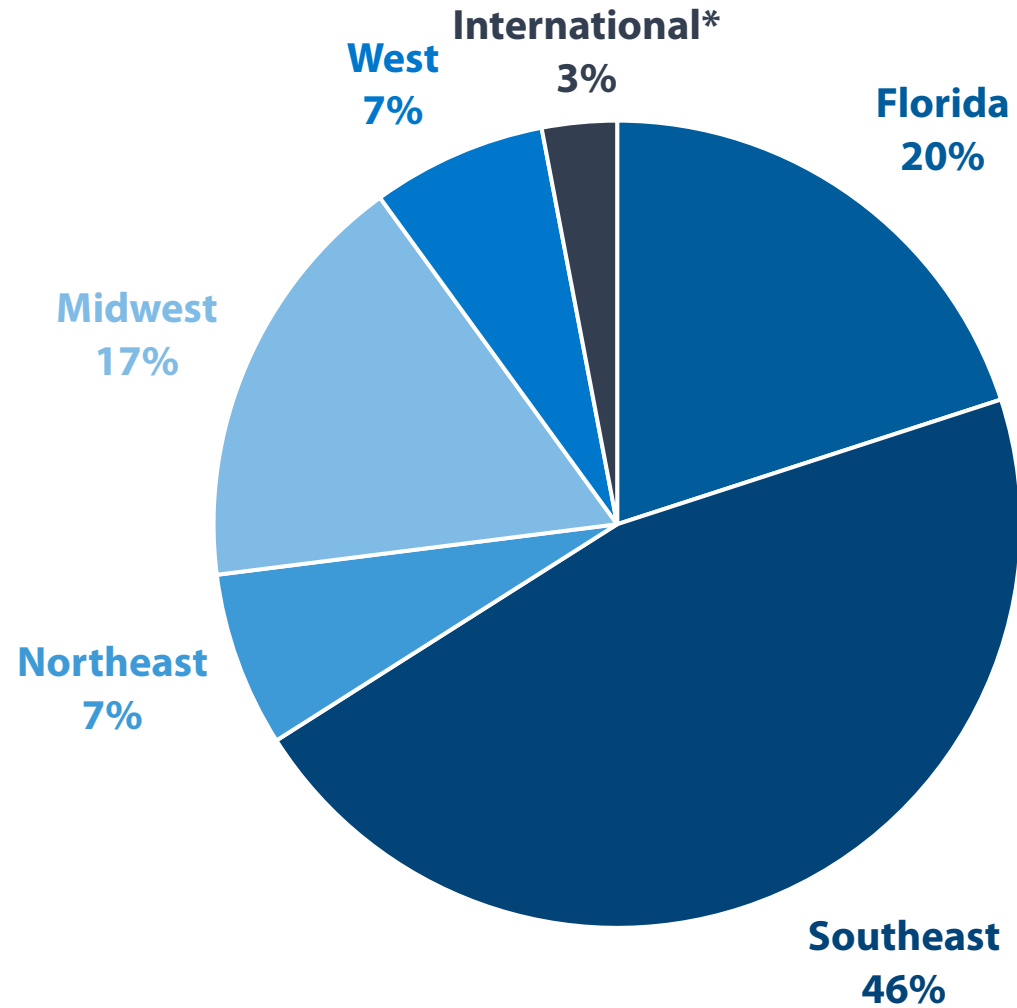


¹ Multiple responses permitted.

VISITOR JOURNEY: TRAVEL PARTY PROFILE



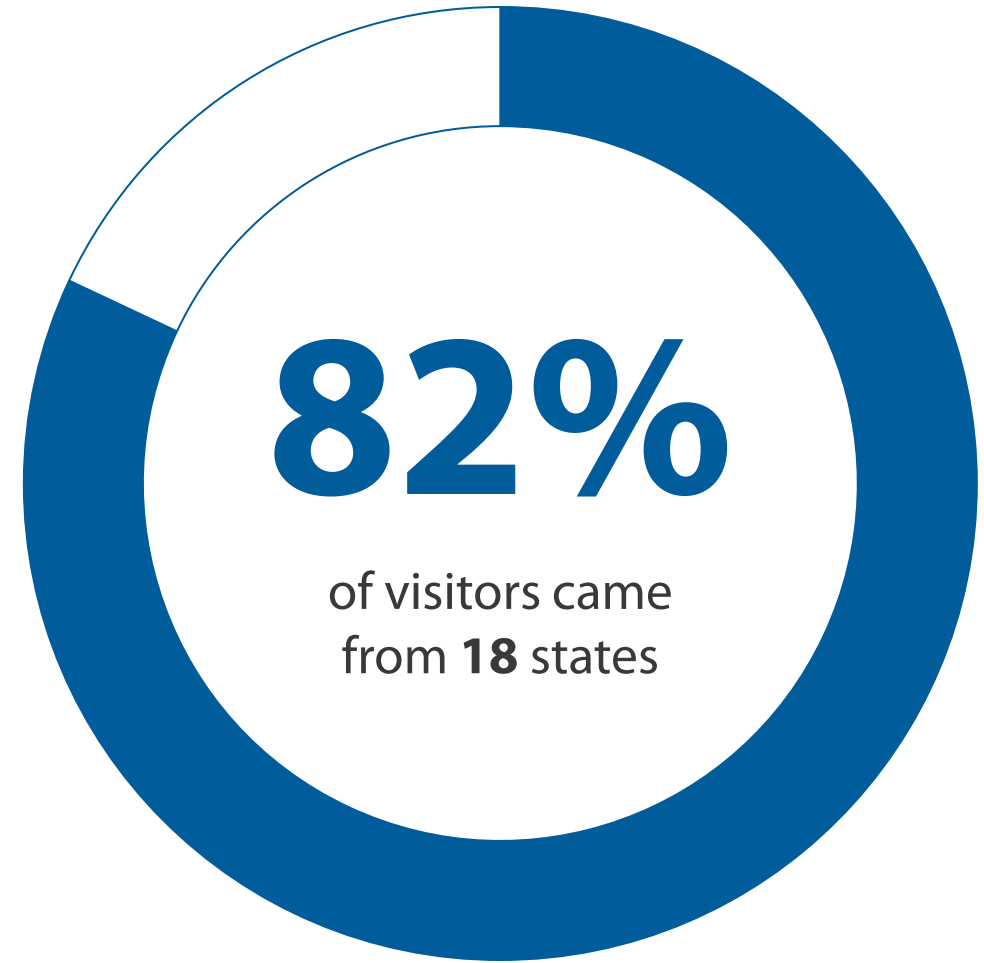
REGION OF ORIGIN



¹ Top international markets include the United Kingdom, Belgium, Quebec, and Ontario.

STATE OF ORIGIN

October – December	2022	2023
Florida	24%	20%
Alabama	16%	15%
Tennessee	5%	6%
Texas	6%	6%
Georgia	5%	5%
Mississippi	4%	4%
Louisiana	3%	3%
North Carolina	2%	3%
Illinois	2%	2%
Indiana	2%	2%
Kansas	<1%	2%
Kentucky	2%	2%
Michigan	2%	2%
Missouri	2%	2%
New York	2%	2%
Virginia	1%	2%
Wisconsin	2%	2%
Ohio	2%	2%



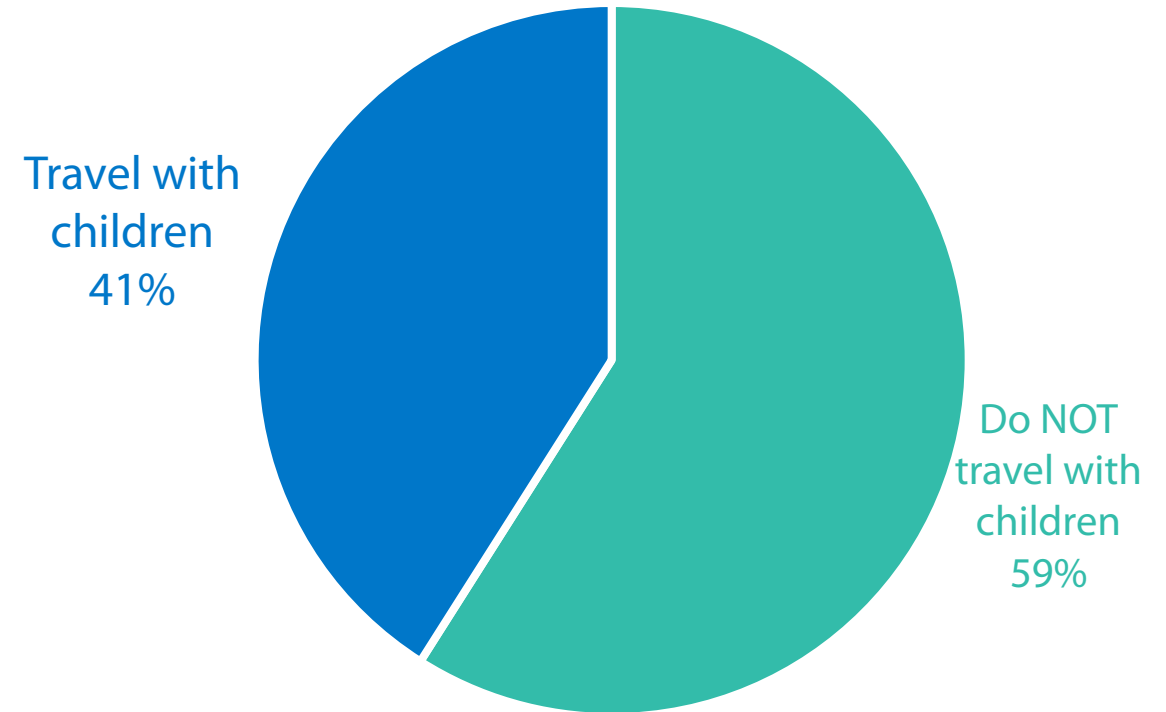
TOP ORIGIN MARKETS

Markets	2022	2023
Mobile ¹	16%	21%
Atlanta	4%	4%
Nashville	3%	3%
New Orleans	2%	2%
Birmingham	3%	2%
Dallas-Fort Worth	2%	2%
Houston	2%	2%
Montgomery	2%	1%
Chicago	1%	1%
Biloxi-Gulfport	1%	1%
Indianapolis	1%	1%

¹ Mobile DMA spans across Florida, Alabama, and Mississippi.

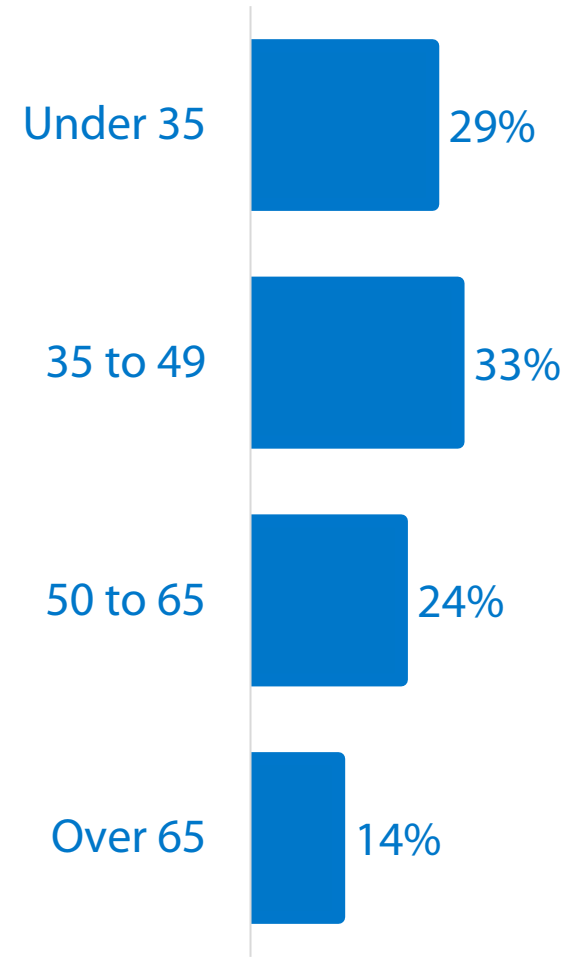
TRAVEL PARTIES

- » For all visitors, the typical travel party size was **2.8** (2.7 in 2022)
- » **2 in 5** travel parties included children under the age of 20 (29% in 2022)



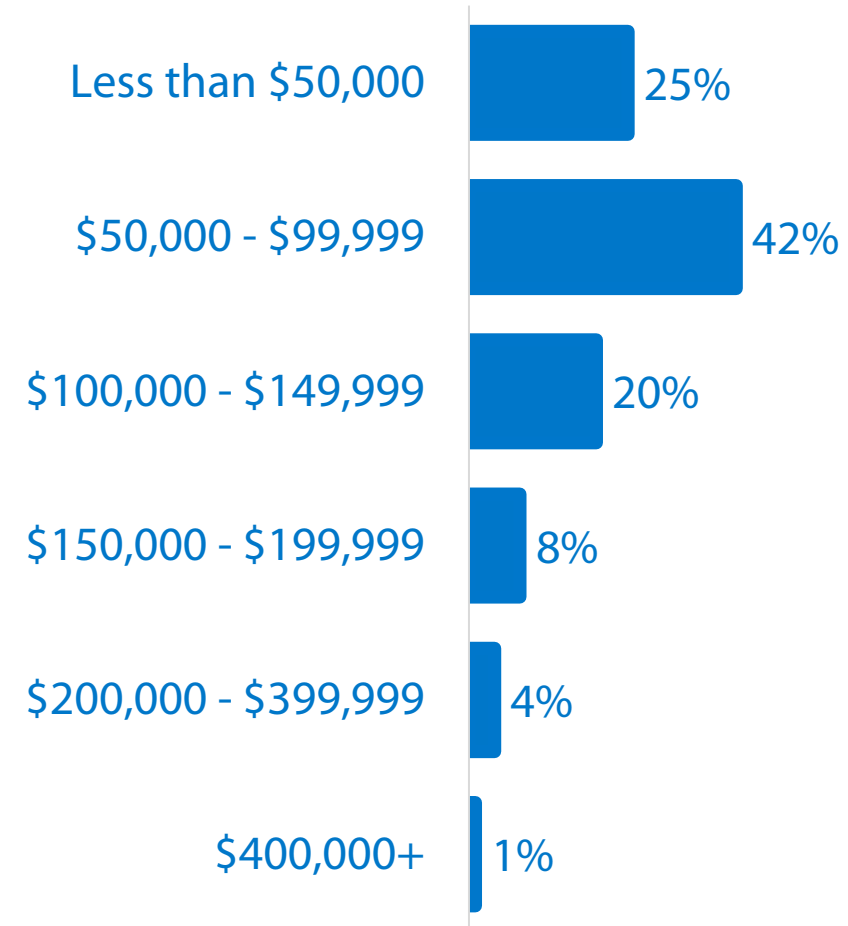
AGE

» The median age of visitors to the Pensacola area was **45** (45 in 2022)



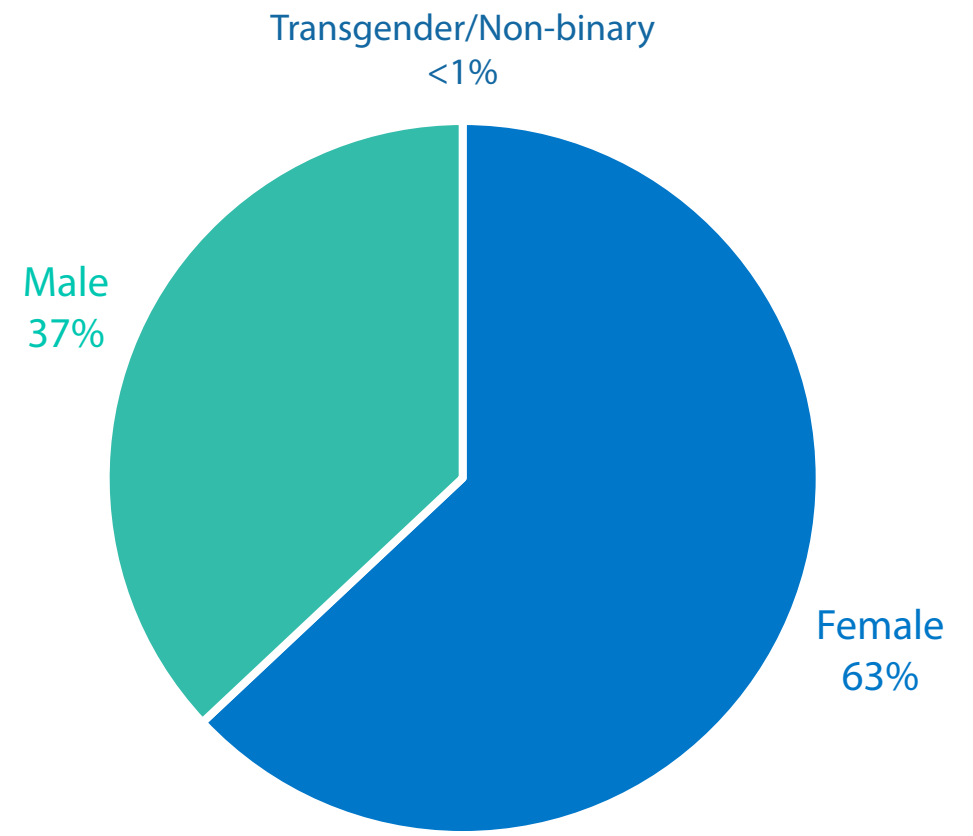
HOUSEHOLD INCOME

- » Visitors to the Pensacola area had a median household income of **\$79,800** per year (\$87,500 in 2022)
- » **13%** of visitors had household incomes over **\$150,000**



GENDER

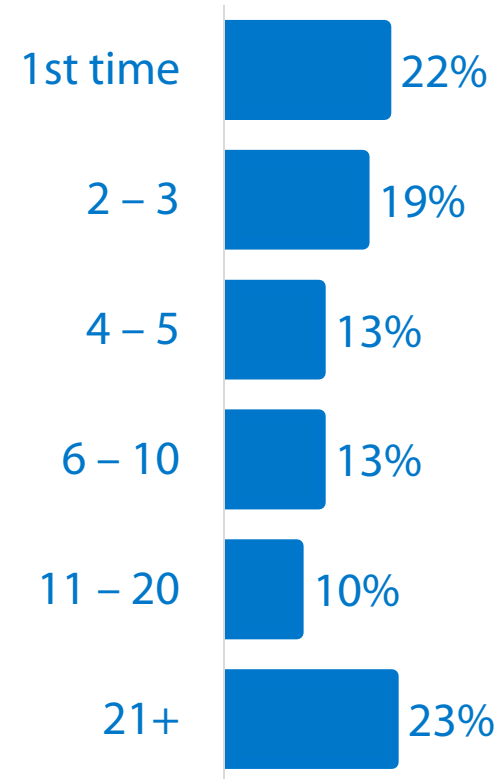
» **63%** of visitors interviewed were **female**¹ (59% in 2022)



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

NEW & RETURNING VISITORS

- » Over **1 in 5** visitors said **this was their first time visiting** the Pensacola area (22% in 2022)
- » **33%** of visitors were loyalists having visited over 10 times (34% in 2022)



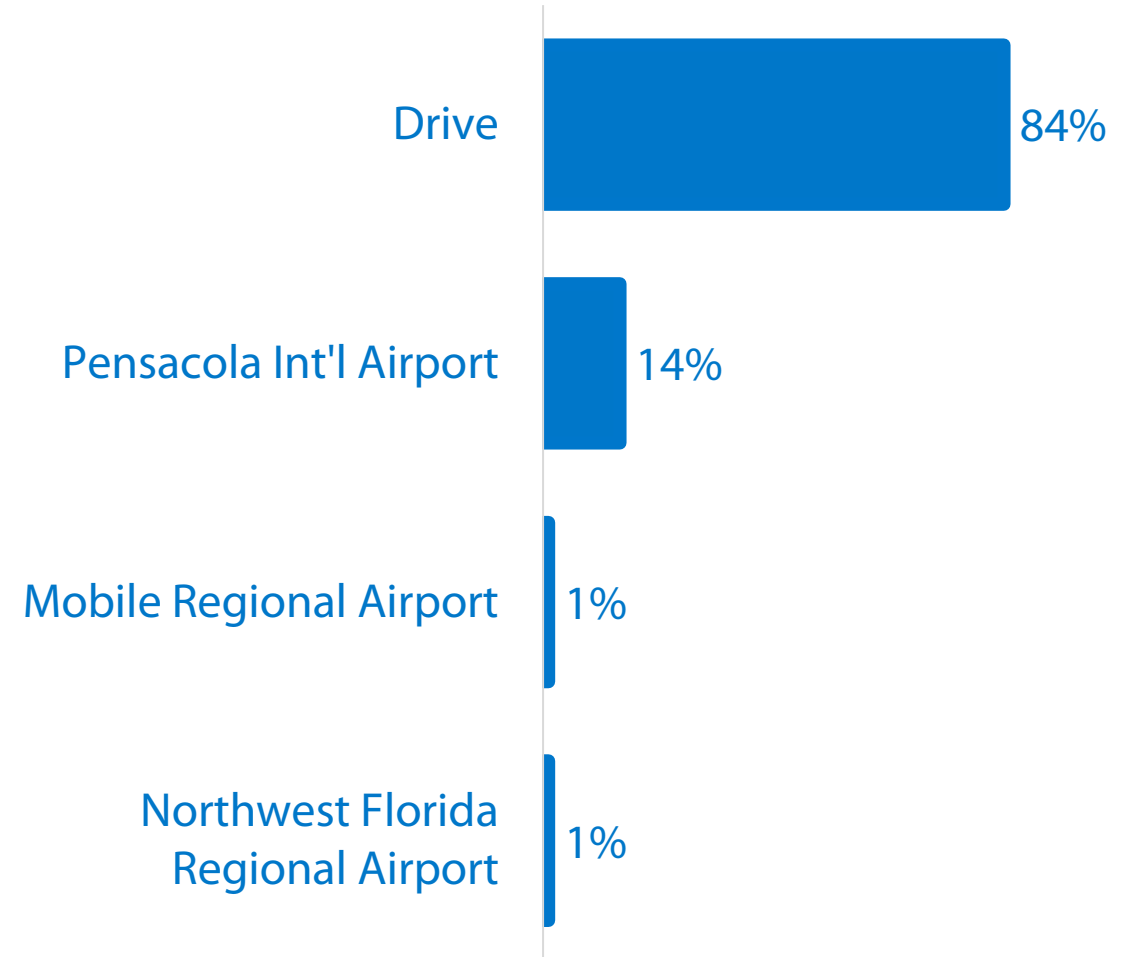
VISITOR JOURNEY: TRIP EXPERIENCE



TRANSPORTATION

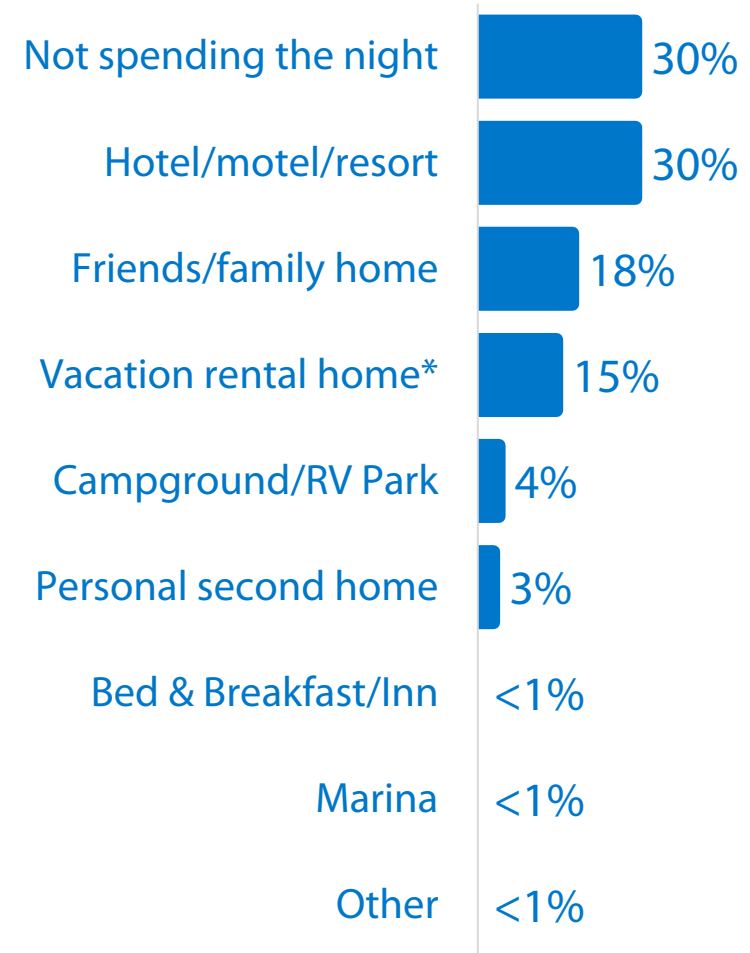
» **84%** of visitors drove to Pensacola area for their trip (84% in 2022)

» **14%** of **all** visitors used the **Pensacola International Airport** (14% in 2022)



ACCOMMODATIONS

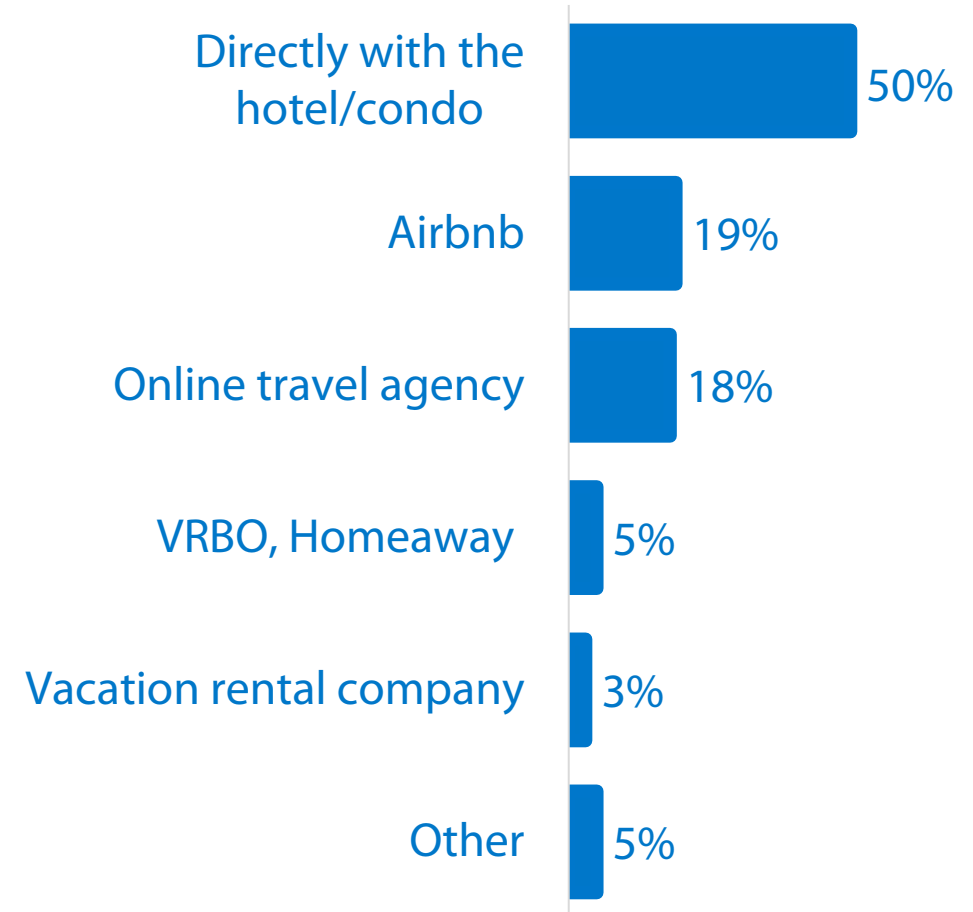
- » **3 in 10** visitors stayed overnight in a **hotel, motel, or resort** (33% in 2022)
- » Typical visitors stayed **4.5** nights in Pensacola area (4.7 in 2022)
- » Typical visitors staying in paid accommodations stayed **5.3** nights in the Pensacola area (5.4 in 2022)



*Includes Airbnb, VRBO, HomeAway, etc.

ACCOMMODATION BOOKING

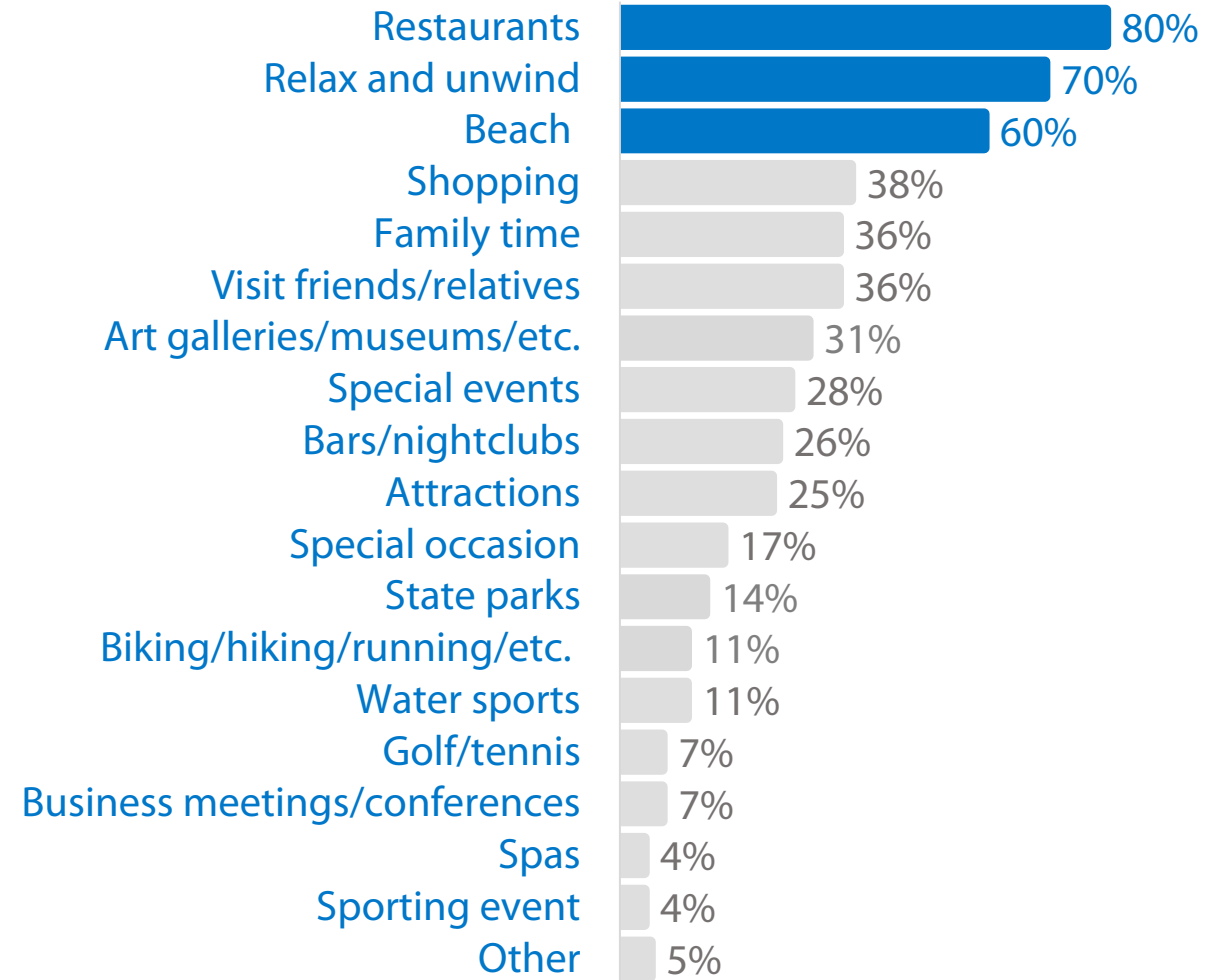
- » **Half** of visitors booked their trip to the Pensacola area **directly with the hotel/condo** (54% in 2022)
- » **19%** visitors booked through **Airbnb** (18% in 2022)



VISITOR ACTIVITIES¹

» Top activities enjoyed by visitors this quarter include:

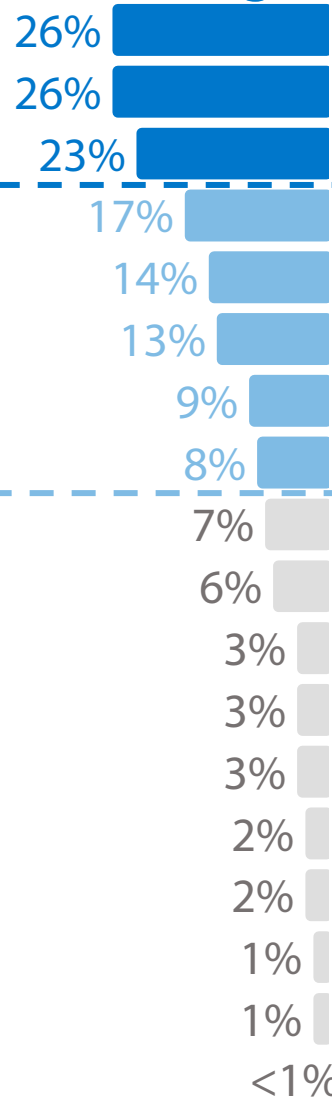
- » **Eating at restaurants**
- » **Enjoying relaxation**
- » **Visiting the beach**



¹ Multiple responses permitted.

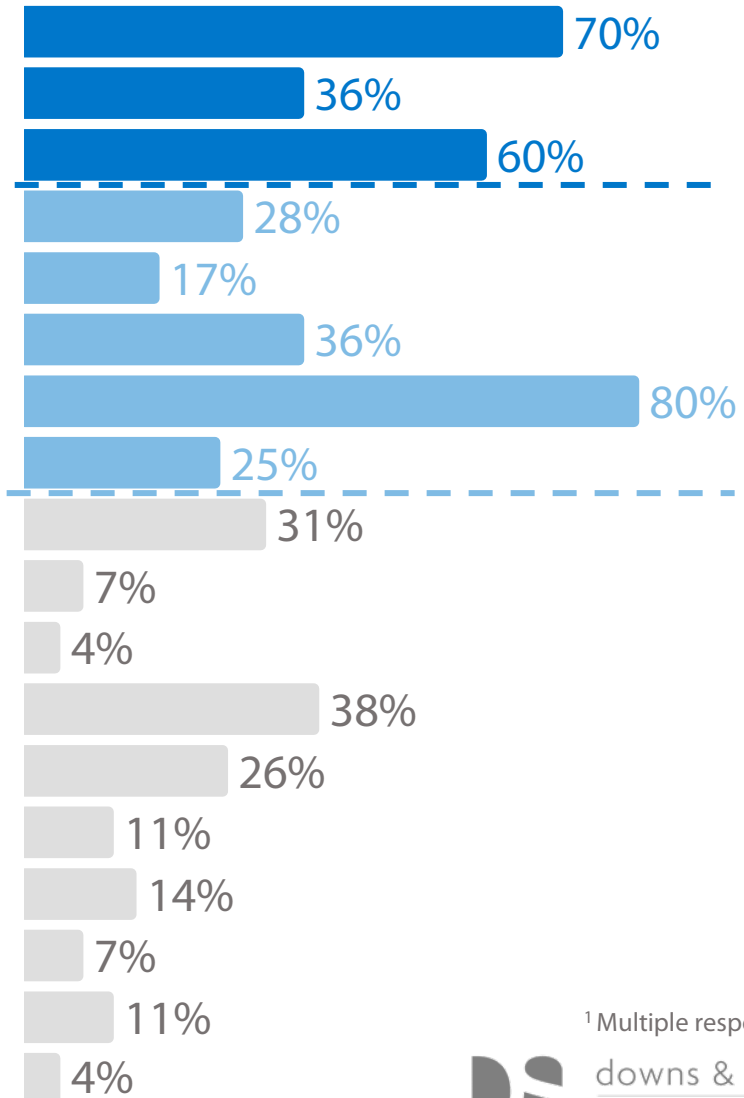
ACTIVITIES V. REASON FOR VISIT¹

Reason for Visiting



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

Visitor Activities



¹ Multiple responses permitted.

DAILY TRAVEL PARTY SPENDING

	<i>All Visitors 2022</i>	<i>All Visitors 2023</i>
<i>Accommodations</i>	<i>\$73</i>	<i>\$86</i>
<i>Restaurants</i>	<i>\$75</i>	<i>\$79</i>
<i>Groceries</i>	<i>\$13</i>	<i>\$15</i>
<i>Shopping</i>	<i>\$38</i>	<i>\$34</i>
<i>Activities & attractions</i>	<i>\$30</i>	<i>\$37</i>
<i>Transportation</i>	<i>\$22</i>	<i>\$238</i>
<i>Other</i>	<i>\$4</i>	<i>\$13</i>
<i>Daily Spending</i>	<i>\$255</i>	<i>\$302</i>

TOTAL TRAVEL PARTY SPENDING

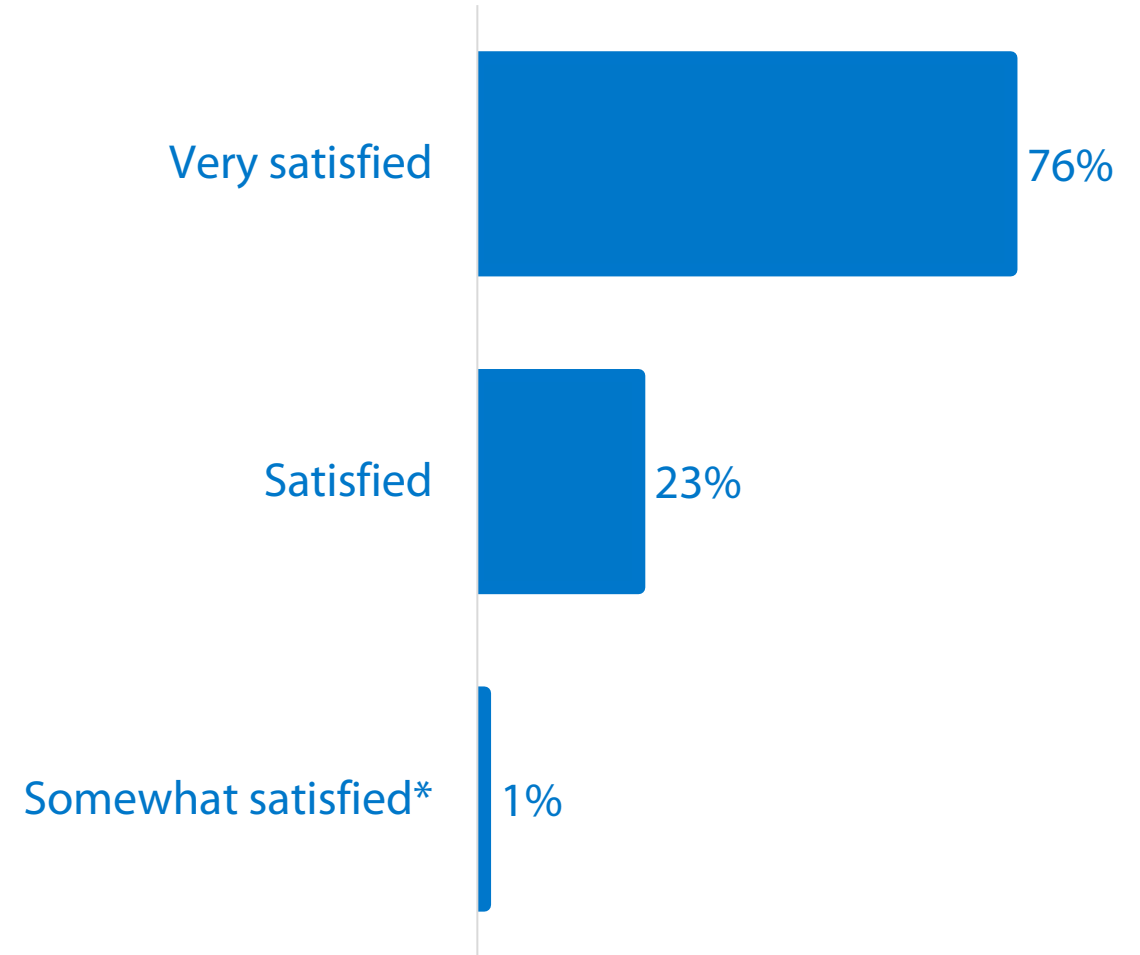
	<i>All Visitors 2022</i>	<i>All Visitors 2023</i>
<i>Accommodations</i>	<i>\$365</i>	<i>\$412</i>
<i>Restaurants</i>	<i>\$371</i>	<i>\$401</i>
<i>Groceries</i>	<i>\$68</i>	<i>\$74</i>
<i>Shopping</i>	<i>\$191</i>	<i>\$184</i>
<i>Activities & attractions</i>	<i>\$148</i>	<i>\$177</i>
<i>Transportation</i>	<i>\$107</i>	<i>\$163</i>
<i>Other</i>	<i>\$23</i>	<i>\$48</i>
Total Spending	\$1,273	\$1,461

VISITOR JOURNEY: POST-TRIP



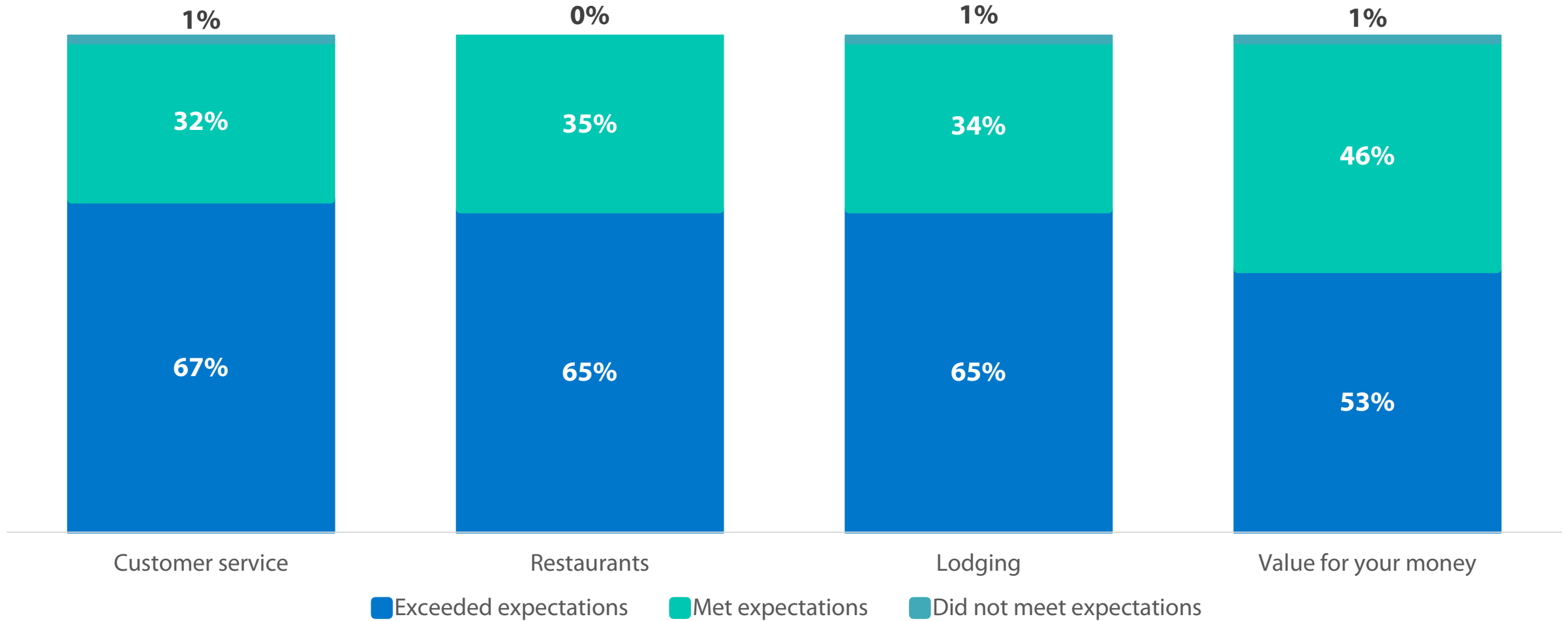
VISITOR SATISFACTION

- » **99%** of visitors were **satisfied** with their trip to Pensacola (98% in 2022)
- » **3 in 4** visitors were **very satisfied** with their trip to Pensacola (75% in 2022)
- » Of visitors who were only somewhat satisfied, reasons listed most often were:
 - » Traffic
 - » High prices



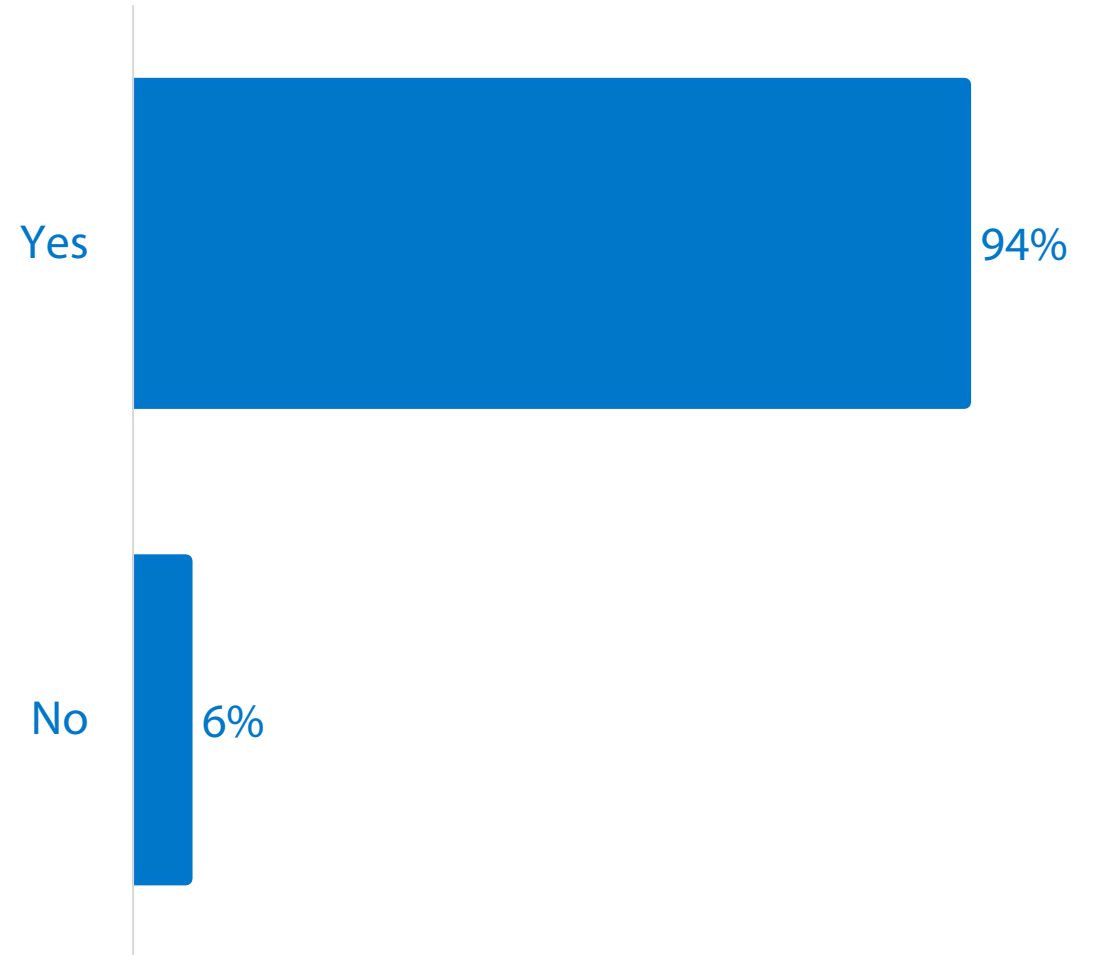
*Those who said somewhat satisfied were asked what features they liked least about the area.

SATISFACTION RATINGS



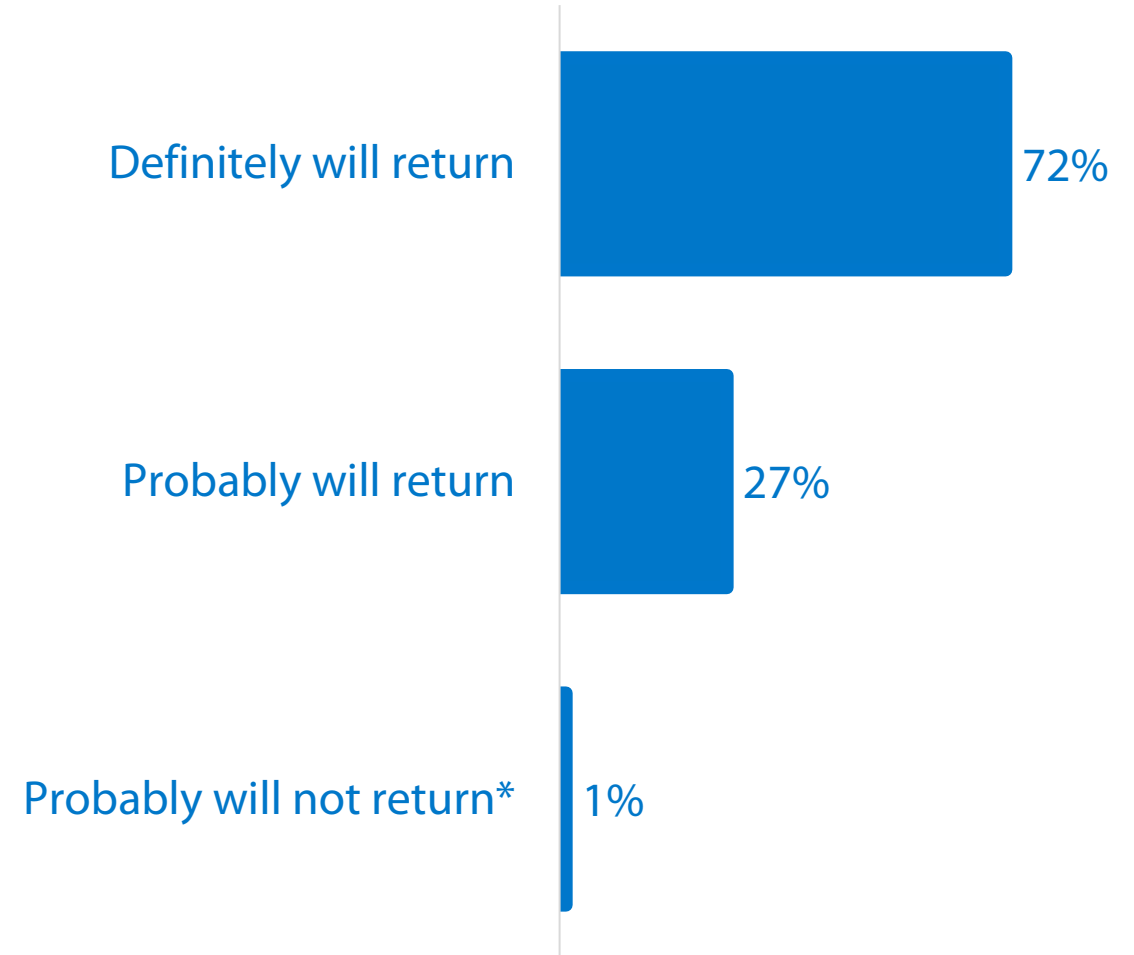
RECOMMENDATION

» **Over 9 in 10** visitors would recommend the Pensacola area to others (91% in 2022)



LIKELIHOOD OF RETURNING

- » **99%** of visitors would **return** to the Pensacola area (99% in 2022)
- » Nearly **3 in 4** visitors would **definitely return** to the Pensacola area (77% in 2022)
- » 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*



- » “Our favorite getaway. Whatever time of year we come there's always something to do. Pensacola is the perfect holiday destination.”
- » “Gorgeous clear beaches, hidden gem and perfect getaway”
- » “The beach is unbelievable, the whitest sand anyone has ever seen before and feels like sugar.”
- » “AMAZING. Love the cute markets downtown and the nearby store. Great night life.”

AREAS OF IMPROVEMENT*



- » “Can get crowded but nice beaches”
- » “Spacious, but bad parking.”
- » “Nice beach but can't easily walk on it. No sidewalks to walk on either. Not that impressed.”
- » “Beaches are beautiful, weather is hot, shopping is fairly good. But the city itself is visually unappealing.”

*Open-ended responses. Multiple responses permitted.



Visitor Tracking Study

- » Interviews were completed in person and online with **1,091 visitors** at events, the airport, the beach, and downtown between **October 1, 2023 and December 31, 2023**

VISIT PENSACOLA

Visitor Tracking Study
October – December 2023

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

