

MAJORITY OPINION

RESEARCH

**Visitor Tracking Study  
Spring 2018 Update**



June 2018

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# Purpose and Methodology

The purpose of this marketing research is to track visitor behaviors and experiences associated with visiting Pensacola, Pensacola Beach and Perdido Key.

Visitors throughout the destination are interviewed by interviewers on the ground with iPads programmed with the questionnaire. Results are provided monthly and summarized seasonally. A total of 300 interviews per month, 900 per season and 3,600 annually are sought and distributed across many locations within the destination:

## **Pensacola**

- Historic Pensacola Village
- Palafox Street
- Saturday Farmer's Market
- T.T. Wentworth, Jr. Florida State Museum
- Pensacola Museum of Art

## **Pensacola Beach**

- Casino Beach Area
- Pensacola Beach (on the beach)
- Portofino Boardwalk

## **Perdido Key**

- Perdido Key (on the beach)
- Perdido Key State Park

## **Pensacola International Airport**

## **Pensacola Lighthouse**

## **Naval Aviation Museum**

# Sample Size

<u>Season</u>	<u>Interviews Conducted</u>
Winter 2014	669
Spring 2014	896
Summer 2014	915
Fall 2014	904
Winter 2015	853
Spring 2015	951
Summer 2015	944
Fall 2015	915
Winter 2016	861
Spring 2016	912
Summer 2016	932
Fall 2016	906
Winter 2017	872
Spring 2017	907
Summer 2017	922
Fall 2017	901
Winter 2018	867
Spring 2018	912

# What You Need to Know

The top 5 visitor feeder markets for Spring 2018 were Mobile, Birmingham, Atlanta, New Orleans, and Memphis, which is a first time Spring 'top 10' origin market.

Visitors planned and booked their trips closer to their visit (less in advance) than last Spring, which continues an 'up - down, up - down' pattern year over year.

Compared to last Spring, a larger percentage of visitors stayed in paid accommodations, but had shorter stays.

Spring visitors continue to be more affluent year over year.

There was an increase in the percentage of first-time visitors this Spring, following a record low percentage last Spring.

While the beach still continues to be the number one draw, it had its lowest Spring time usage among visitors this year.

Most visitor experience ratings are similar to last Spring, but there were significantly higher ratings for shopping, activities other than the beach, and historical offerings/attractions.

Even with that significant increase in perceptions of activities other than the beach, Spring 2018 visitors were still seeking a better experience in that area.

Correlating to the shorter length of stay, Spring 2018 visitors spent an average of \$1,417 (slightly lower than last Spring), or \$218 per day (slightly higher than last Spring).

About half of the Spring 2018 visitors recall being exposed to at least one marketing communications tool over the past year, which is slightly higher than last Spring. Within this, advertising recall is up significantly, while website visitation and Facebook interaction is down significantly.

Nearly all Spring 2018 visitors (97%) say they would recommend Pensacola to others, with 94% planning to return for a future visit. 77% plan to return within the next year and 30% plan to visit again within the next six months, which is up significantly from last Spring.

# Top Feeder Markets

<u>Rolling Year*</u>	<u>Summer '17</u>	<u>Fall '17</u>	<u>Winter '18</u>	<u>Spring '18</u>
Mobile, AL	Atlanta, GA	Mobile, AL	Mobile, AL	Mobile, AL
Atlanta, GA	Mobile, AL	Atlanta, GA	Atlanta, GA	Birmingham, AL
Birmingham, AL	Dallas, TX	Birmingham, AL	Birmingham, AL	Atlanta, GA
New Orleans, LA	Houston, TX	New Orleans, LA	Washington, DC	New Orleans, LA
Nashville, TN	New Orleans, LA	Montgomery, AL	Dallas, TX	Memphis, TN
Dallas, TX	Nashville, TN	Nashville, TN	Chicago, IL	Nashville, TN
Montgomery, AL	Montgomery, AL	Washington, DC	Montgomery, AL	Montgomery, AL
Houston, TX	Birmingham, AL	Jacksonville, FL	New York, NY	Dallas, TX
Washington, DC	Memphis, TN	Dallas, TX	Orlando, FL	Washington, DC
Memphis, TN	Huntsville, AL	Houston, TX	New Orleans, LA	Houston, TX

Notes 4 season consistency.

Notes 3 season consistency.

\* June 2017 – May 2018

# Top Winter Feeder Markets Trend

<u>Spring '14</u>	<u>Spring '15</u>	<u>Spring '16</u>	<u>Spring '17</u>	<u>Spring '18</u>
Atlanta, GA	Mobile, AL	Mobile, AL	Mobile, AL	Mobile, AL
Mobile, AL	Atlanta, GA	Atlanta, GA	Atlanta, GA	Birmingham, AL
Birmingham, AL	New Orleans, LA	New Orleans, LA	New Orleans, LA	Atlanta, GA
New Orleans, LA	Birmingham, AL	Birmingham, AL	Birmingham, AL	New Orleans, LA
Montgomery, AL	<b>Gulfport-Biloxi, MS</b>	Houston, TX	Nashville, TN	<b>Memphis, TN</b>
Dallas, TX	Nashville, TN	<b>Ft. Walton Beach</b>	Dallas, TX	Nashville, TN
<b>Gulfport-Biloxi, MS</b>	<b>Baton Rouge, LA</b>	<b>Indianapolis, IN</b>	Houston, TX	Montgomery, AL
Nashville, TN	<b>Eau Claire, WI</b>	Washington, DC	<b>Baton Rouge, LA</b>	Dallas, TX
<b>Cincinnati, OH</b>	<b>Indianapolis, IN</b>	<b>Charleston, SC</b>	<b>Jackson, MS</b>	Washington, DC
<b>Chicago, IL</b>	Dallas, TX	<b>Gulfport-Biloxi, MS</b>	<b>Little Rock, AR</b>	Houston, TX

Was a previous top 10, but not currently

Is a top 10 currently, but was not previously

# Generational Top Spring Feeder Markets

## Centennials

Mobile, AL  
Atlanta, GA  
Houston, TX  
Nashville, TN  
Memphis, TN  
Montgomery, AL  
Columbus, GA  
Jacksonville, FL  
Columbus, MS  
Biloxi-Gulfport, MS

## Millennials

Mobile, AL  
Atlanta, GA  
New Orleans, LA  
Birmingham, AL  
Memphis, TN  
Nashville, TN  
Houston, TX  
Columbus, GA  
Jacksonville, FL  
Dallas, TX

## Generation X

Birmingham, AL  
Mobile, AL  
Montgomery, AL  
New Orleans, LA  
Memphis, TN  
Atlanta, GA  
Washington, DC  
Nashville, TN  
Little Rock, AR  
New York, NY

## Baby Boomers

Mobile, AL  
Atlanta, GA  
Dallas, TX  
Memphis, TN  
Cleveland, OH  
Washington, DC  
New Orleans, LA  
Tampa-St Pete, FL  
Montgomery, AL  
Birmingham, AL

## Silent Generation

Mobile, AL  
Grand Rapids, MI  
Chicago, IL  
Baltimore, MD  
Richmond, VA  
Memphis, TN  
Cincinnati, OH  
Detroit, MI  
Philadelphia, PA  
Birmingham, AL

Notes 5 generation consistency.

Notes 4 generation consistency.



# Visit Profile

	<u>Rolling Year*</u>	<u>Summer '17</u>	<u>Fall '17</u>	<u>Winter '18</u>	<u>Spring '18</u>
Leisure Trip	64%	69%	62%	56%	64%
Visiting family and friends	30%	27%	31%	36%	29%
Business Trip	6%	4%	7%	8%	7%
Advance Planning (days)	50	52	45	57	46
Advance Booking (days)	46	48	41	54	42
Stayed in Paid Accommodations	63%	58%	69%	58%	70%
Average Party Size	3.4	3.9	3.4	2.9	3.4
Primary Destination	87%	86%	89%	86%	86%
Average Length of Lodging Stay	6.2	4.5	4.3	10.7	6.5

\* June 2017 – May 2018

# Spring Visit Profile Trend

	<u>Spring '14</u>		<u>Spring '15</u>		<u>Spring '16</u>		<u>Spring '17</u>		<u>Spring '18</u>
Leisure Trip	60%	→	74%	←	70%	←	66%		64%
Visiting Family and Friends	34%	←	21%		20%	→	26%		29%
Business Trip	6%	→	5%	→	10%		7%		7%
Advance Planning (days)	51	→	58	←	32	→	55	←	46
Advance Booking (days)	47	→	56	←	29	→	51	←	42
Stayed in Paid Accommodations	55%	→	78%		76%	←	66%	→	70%
Average Party Size	2.7		2.6		2.9		3.3		3.4
Primary Destination	88%		92%		95%	←	87%		86%
Average Length of Stay (lodging)	7.4		6.8	→	8.1		7.2	←	6.5

# Generational Spring Visit Profile

	<u>Centennials</u>	<u>Millennials</u>	<u>Generation X</u>	<u>Baby Boomers</u>	<u>Silent Generation</u>
Leisure Trip	65%	65%	67%	61%	46%
Visiting family and friends	26%	26%	27%	34%	54%
Business Trip	9%	8%	6%	4%	-
Advance Planning (days)	41	42	46	52	73
Advance Booking (days)	38	37	44	47	70
Stayed in Paid Accommodations	66%	72%	78%	62%	42%
Average Party Size	4.3	3.4	3.5	3.0	3.0
Primary Destination	93%	88%	88%	81%	71%
Average Length of Lodging Stay	4.0	5.1	5.0	9.7	25.9

**Centennials:** Born 1996 -; **Millennials:** Born 1977 to 1995; **Generation X:** Born 1965 to 1976; **Baby Boomers:** Born 1946 to 1964; **Silent Generation:** Born 1945 and before

# Visitor Profile

	<u>Rolling Year*</u>	<u>Summer '17</u>	<u>Fall '17</u>	<u>Winter '18</u>	<u>Spring '18</u>
Average Age of Decision Maker	44	43	45	46	43
Average Age of Visitor	39	37	40	43	39
Traveled with Children	30%	40%	26%	20%	28%
Average Income	\$87,874	\$88,877	\$81,870	\$83,666	\$95,354
First-Time Visitor	34%	33%	34%	31%	36%
Flew to Area	25%	21%	25%	25%	29%

\* June 2017 – May 2018

# Spring Visitor Profile Trend

	<u>Spring '14</u>	<u>Spring '15</u>	<u>Spring '16</u>	<u>Spring '17</u>	<u>Spring '18</u>
Average Age of Decision Maker	46	45	43	45	43
Average Age of Visitor	41	41	38	39	39
Traveled with Children	20%	19%	21% →	31%	28%
Average Income	\$79,220	\$75,600	\$77,034 →	\$86,855 →	\$95,354
First-Time Visitor	39%	42% →	50% ←	32%	36% →
Flew to Area	24% ←	15%	24% →	22%	29% →

# Generational Spring Visitor Profile

	<u>Centennials</u>	<u>Millennials</u>	<u>Generation X</u>	<u>Baby Boomers</u>	<u>Silent Generation</u>
Traveled with Children	22%	35%	43%	10%	4%
Average Income	\$54,362	\$74,693	\$117,705	\$110,951	\$88,415
First-Time Visitor	44%	37%	40%	32%	15%
Flew to Area	28%	18%	32%	40%	39%

**Centennials:** Born 1996 -; **Millennials:** Born 1977 to 1995; **Generation X:** Born 1965 to 1976; **Baby Boomers:** Born 1946 to 1964; **Silent Generation:** Born 1945 and before

# Visitor Activities

	<u>Rolling Year*</u>	<u>Summer '17</u>	<u>Fall '17</u>	<u>Winter '18</u>	<u>Spring '18</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Went to the beach	76	86	72	66	77
Went to a fine dining restaurant	24	29	22	25	20
Went shopping	36	41	30	36	36
Visited museums	26	32	22	30	20
Visited art galleries	10	10	8	14	9
Went fishing	14	16	12	10	17
Participated in water sports	13	23	11	2	10
Attended a ticketed performance	6	8	4	10	5
Played golf	10	9	10	12	7
Attended professional sporting event	4	6	1	2	4
Non-professional spectator sports	4	4	4	2	3
Ecotourism	8	4	5	11	10

\* June 2017 – May 2018

# Spring Visitor Activities Trend

	<u>Spring '14</u>		<u>Spring '15</u>		<u>Spring '16</u>		<u>Spring '17</u>		<u>Spring '18</u>
	<u>%</u>		<u>%</u>		<u>%</u>		<u>%</u>		<u>%</u>
Went to the beach	86	→	91	←	82		85	←	77
Went to a fine dining restaurant	30	→	38	→	52	←	23		20
Went shopping	35	←	30	→	44	←	34		36
Visited museums	35	→	53	←	29		28	←	20
Visited art galleries	9	→	13		13	←	5	→	9
Went fishing	10		13		13		16		17
Participated in water sports	7	→	22	←	6		7	→	10
Attended a ticketed performance	4		4		5		4		5
Played golf	6		6		9		7		7
Attended professional sporting event	4		1		2		4		4
Attended non-professional spectator sports	3		1		3		3		3
Ecotourism	NA		NA		NA		5	→	10

NA = Not Asked



# Generational Spring Visitor Activities

	<u>Centennials</u>	<u>Millennials</u>	<u>Generation X</u>	<u>Baby Boomers</u>	<u>Silent Generation</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Went to the beach	97	77	74	76	86
Shopped	40	38	41	29	43
Visited museums	16	18	18	25	33
Went to a fine dining restaurant	18	18	21	21	32
Went fishing	16	14	22	16	14
Ecotourism	-	10	12	11	5
Participated in water sports	28	12	9	5	4
Visited art galleries	3	9	12	9	5
Played golf	3	10	7	4	4
Free performance/event	8	6	4	7	4
Ticketed performance	3	4	4	6	8
Professional sporting event	-	6	1	4	5
Non-professional spectator sports	7	4	2	2	-

# Visitor Experience Ratings

	<u>Rolling Year*</u>	<u>Summer '17</u>	<u>Fall '17</u>	<u>Winter '18</u>	<u>Spring '18</u>
<u>Positive opinion of:</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
A place you feel comfortable	95	96	97	92	97
A place to relax	95	95	97	90	97
A place to have fun	94	94	96	89	96
Good place to visit as a couple	90	88	94	86	91
Scenic beauty	95	96	97	91	97
Clean, well maintained beaches	91	89	95	88	93
Good place to visit with children	87	86	90	85	88
Dining options you want	88	82	94	86	90
Value for the travel dollar	89	85	93	88	90
Shopping options you want	77	68	85	77	80
Activities other than the beach	78	73	84	77	81
Historical offerings/attractions	78	71	82	80	80
Customer service received	93	91	96	91	93
Nightlife options you want	71	NA	74	69	70

\* June 2017 – May 2018

# Spring Visitor Experience Ratings Trend

	<u>Spring '14</u>		<u>Spring '15</u>		<u>Spring '16</u>		<u>Spring '17</u>		<u>Spring '18</u>
<u>Positive opinion of:</u>	<u>%</u>		<u>%</u>		<u>%</u>		<u>%</u>		<u>%</u>
A place you feel comfortable	96		99		97		96		97
A place to relax	94	→	99		96		96		97
A place to have fun	94		96		96		95		96
Good place to visit as a couple	93	→	97	←	92		92		91
Scenic beauty	95	→	99		96		95		97
Clean, well maintained beaches	95		97		96		94		93
Good place to visit with children	90	←	83		86	→	90		88
Dining options you want	89	→	94		92	←	87		90
Value for the travel dollar	84	→	92		91	←	87		90
Shopping options you want	81		82	→	86	←	74	→	80
Activities other than the beach	80	→	88		86	←	77	→	81
Historical offerings/attractions	85		88	←	80	←	76	→	80
Customer service received	NA		NA		93		92		93
Nightlife options you want	NA		NA		NA		NA		70

NA = Not Asked

# Generational Spring Visitor Experience Ratings

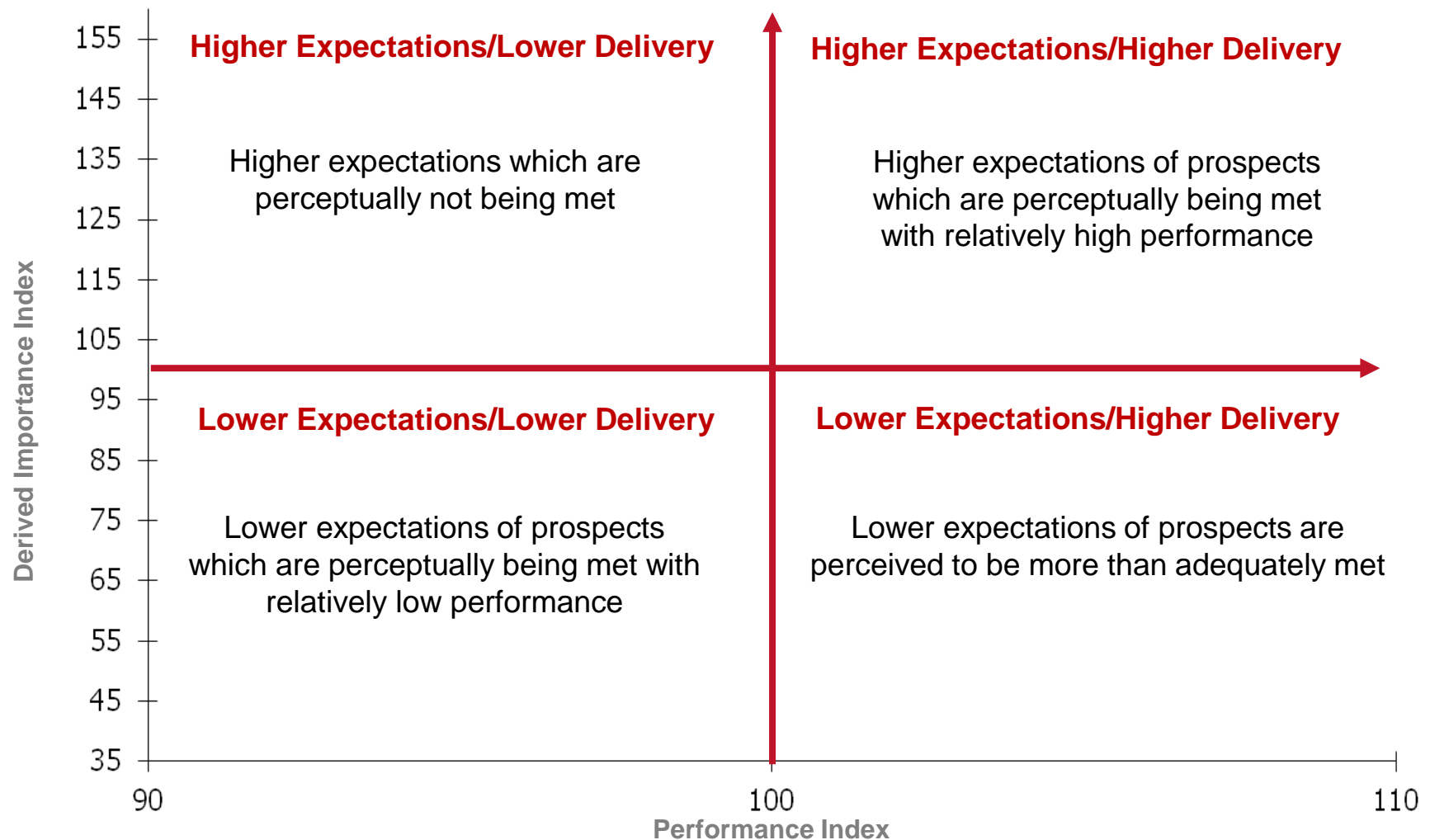
	<u>Centennials</u>	<u>Millennials</u>	<u>Generation X</u>	<u>Baby Boomers</u>	<u>Silent Generation</u>
<u>Positive opinion of:</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
A place to relax	90	97	99	96	95
A place you feel comfortable	91	98	96	97	95
Having scenic beauty	94	97	98	95	95
A place to have fun	87	96	96	95	95
Customer service you've received	90	91	96	93	95
Clean, well maintained beaches	87	93	95	92	86
Good place to visit as a couple	79	94	92	90	81
Offering value for the travel dollar	74	89	92	91	95
Having the dining options you want	85	89	91	90	90
Good place to visit with children	62	92	91	83	87
Activities other than the beach	72	84	82	77	71
Having shopping options you want	66	81	85	80	67
Historical offerings/attractions	48	79	84	83	90
Having the nightlife options you want	66	74	80	63	27

# Derived Importance

Derived importance is a statistical measure that relates the overall importance or influence that the individual attributes have on the overall rating or likelihood to purchase a product service or brand. The statistical procedure used to calculate Derived Importance is called the Pearson Bivariate Correlation. This procedure calculates the simple correlation coefficients between the overall rating and the attribute performance ratings. That is to say how similar each attribute rating is to the overall rating. This analysis is done on a respondent-by-respondent basis and then combined for interpretation.

Derived Importance goes beyond what respondents claim is important to them and uncovers the underlying reasons for making consumer choices. For instance, one might say that cleanliness is important in a restaurant, say that safety is important in a car, say that financial stability is important for a bank, and say that qualified physicians are important in a hospital. This does not necessarily mean that those attributes drive, or contribute, to an overall rating or purchase; in fact, we have ample evidence that this is not necessarily what determines (drives) what brand, product, or service people select. Rather, when consumers are asked how important specific attributes are, they are simply giving the 'price of entry' for the category.

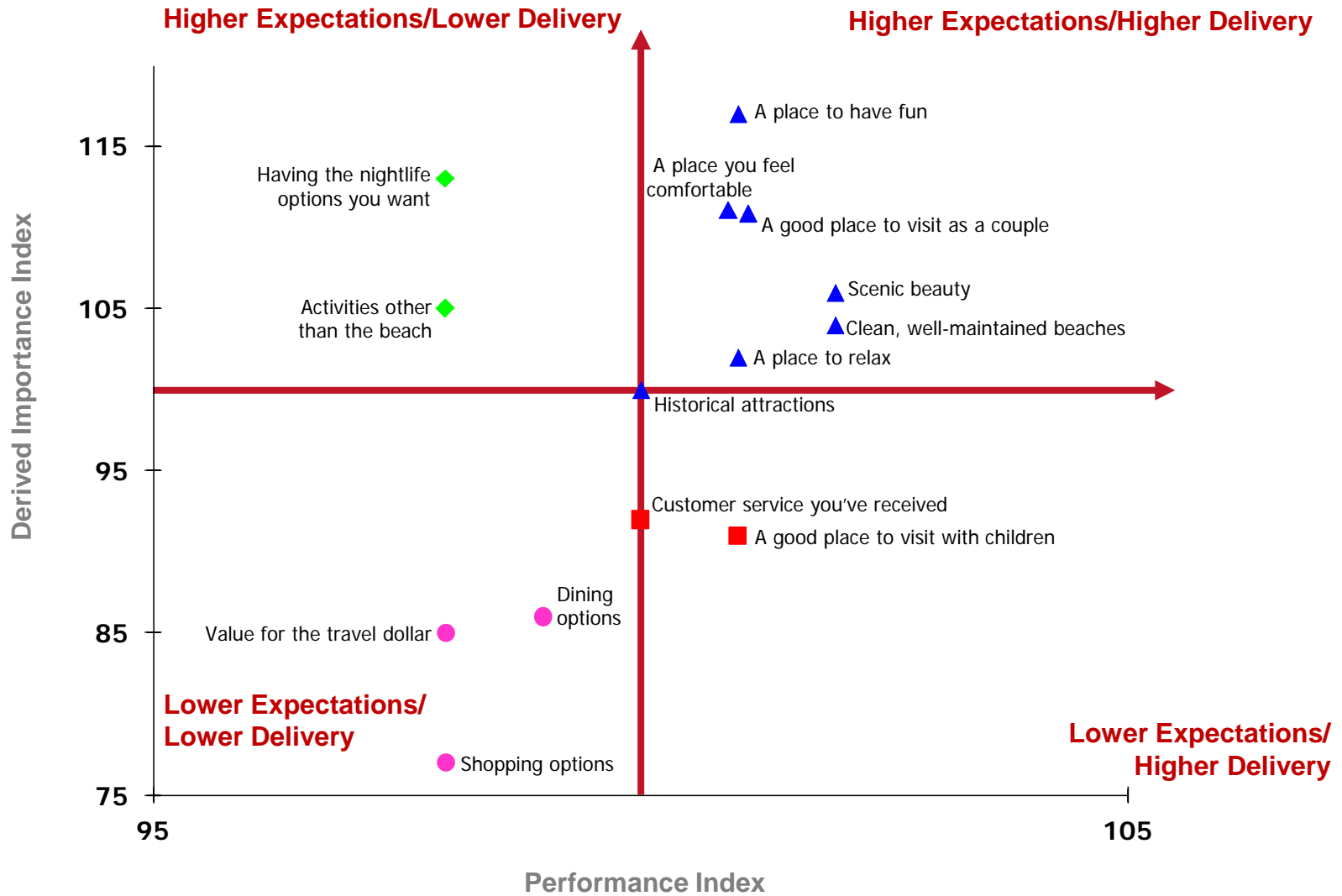
# Delivery vs. Expectations Analysis



"Derived Importance" is the result of a correlation analysis that measures the relationship between the ratings of individual experience attributes and the destination's overall rating. The analysis is conducted on a respondent by respondent basis and combined for interpretation.

# Rolling Year Delivery vs. Expectations

(3,602 Pensacola/Pensacola Beach/Perdido Key Visitors June 2017 – May 2018)



# Delivery vs. Expectations by Season

Rolling Year: June 2017 – May 2018

- ▲ High Expectations Met
- Lower Expectations Exceeded
- ◆ High Expectations Not Met
- Lower Expectations Met

Attributes	Rolling Year	Spring '17	Summer '17	Fall '17	Winter '18	Spring '18
A place you feel comfortable	▲	▲	▲	▲	▲	▲
A place to have fun	▲	▲	▲	▲	▲	▲
A place to relax	▲	▲	■	■	■	▲
Being a good place to visit with children	■	▲	■	▲	▲	■
Being a good place to visit as a couple	▲	▲	▲	▲	▲	■
Having activities/entertainment other than the beach	◆	●	◆	●	◆	◆
Having clean, well maintained beaches	▲	■	■	▲	▲	▲
Having the dining options you want	●	●	●	●	●	●
Historical offerings/attractions	▲	●	▲	◆	●	▲
Having scenic beauty	▲	■	■	▲	▲	■
Having the shopping options you want	●	●	●	●	●	●
Offering value for the travel dollar	●	●	●	●	◆	●
Customer service you've received	■	■	▲	■	▲	■
Having the nightlife options you want	◆	NA	NA	NA	NA	●



# Delivery vs. Expectations by Generation

Rolling Year: June 2017 – May 2018

- ▲ High Expectations Met
- Lower Expectations Exceeded
- ◆ High Expectations Not Met
- Lower Expectations Met

Attributes	Rolling Year	Spring '18	Spring 2018 Generation		
			Millennials	Generation X	Baby Boomers
A place you feel comfortable	▲	▲	▲	▲	▲
A place to have fun	▲	▲	▲	▲	▲
A place to relax	▲	▲	▲	■	▲
Being a good place to visit with children	■	■	▲	■	■
Being a good place to visit as a couple	▲	■	▲	▲	■
Having activities/entertainment other than the beach	◆	◆	◆	◆	◆
Having clean, well maintained beaches	▲	▲	■	■	▲
Having the dining options you want	●	●	◆	◆	●
Historical offerings/attractions	▲	▲	■	■	■
Having scenic beauty	▲	■	■	▲	▲
Having the shopping options you want	●	●	●	●	●
Offering value for the travel dollar	●	●	◆	●	●
Customer service you've received	■	■	●	■	▲
Having the nightlife options you want	◆	●	●	■	◆

Millennials: Born 1977 to 1995; Generation X: Born 1965 to 1976; Baby Boomers: Born 1946 to 1964

# Visitor Spending

	<u>Rolling Year*</u>	<u>Summer '17</u>	<u>Fall '17</u>	<u>Winter '18</u>	<u>Spring '18</u>
Average Total Spend	\$1,337	\$1,431	\$1,055	\$1,452	\$1,417
Average Spend Per Day	\$216	\$321	\$244	\$136	\$218
<u>Allocation of \$</u>					
Lodging	45%	45%	44%	43%	48%
Dining	22%	21%	22%	22%	23%
Shopping	10%	10%	11%	11%	9%
Gasoline	4%	5%	4%	4%	4%
Grocery	8%	7%	7%	8%	8%
Activities	9%	9%	11%	9%	8%
Anything else	2%	3%	1%	3%	1%

\* June 2017 – May 2018

# Spring 2018 Spending Segmentation

	<u>Total</u>	<u>Reason for Visit</u>		<u>Visitor Experience</u>		<u>Visitor Type</u>	
		<u>Leisure</u>	<u>Business</u>	<u>First Time</u>	<u>Repeat</u>	<u>Lodging</u>	<u>Non-Lodging</u>
Total	\$1,417	\$1,442 ←	\$916	\$1,650 ←	\$1,285	\$1,862 ←	\$406
<u>Allocation of \$</u>							
Lodging	48%	48%	51%	51% ←	45%	52% ←	0%
Dining	23%	23%	24%	23%	22%	21% →	36%
Shopping	9%	9%	5%	8%	11%	8% →	24%
Gasoline	4%	3%	6%	3%	4%	3% →	7%
Grocery	8%	7%	6%	7%	8%	7% →	13%
Activities	8%	8%	5%	6%	9%	7% →	16%
Anything else	1%	2%	3%	1%	2%	1%	4%

# Spring Visitor Spending Trend

	<u>Spring '14</u>		<u>Spring '15</u>		<u>Spring '16</u>		<u>Spring '17</u>		<u>Spring '18</u>
Average Total Spend	\$995	→	\$1,523		\$1,273		\$1,525		\$1,417
Average Spend Per Day	\$135	→	\$223	←	\$156	→	\$211		\$218
<u>Allocation of \$</u>									
Lodging	39%	→	46%	←	35%	→	50%		48%
Dining	26%		24%		23%		21%		23%
Shopping	11%		9%		11%		9%		9%
Gasoline	8%		6%		7%		4%		4%
Grocery	7%		6%		8%		7%		8%
Activities	5%		7%		12%	←	8%		8%
Anything else	5%		1%		4%		2%		1%

# Generational Spring Visitor Spending

	<u>Centennials</u>	<u>Millennials</u>	<u>Generation X</u>	<u>Baby Boomers</u>	<u>Silent Generation</u>
Average Total Spend	\$1,919	\$1,278	\$1,349	\$1,551	\$1,682
Average Spend Per Day	\$480	\$251	\$272	\$160	\$65
<u>Allocation of \$</u>					
Lodging	54%	45%	49%	48%	49%
Dining	28%	26%	20%	20%	24%
Activities	5%	9%	9%	7%	4%
Shopping	6%	9%	9%	11%	9%
Gasoline	2%	4%	4%	3%	4%
Groceries	3%	6%	8%	10%	11%
Anything else	1%	2%	1%	2%	-

# Communications

	<u>Rolling Year*</u>	<u>Summer '17</u>	<u>Fall '17</u>	<u>Winter '18</u>	<u>Spring '18</u>
<u>Net Communications Reach</u>	51%	52%	50%	51%	51%
Recall advertising	31%	26%	34%	33%	31%
Recall public relations	28%	24%	35%	32%	22%
Visited <a href="http://www.visitpensacola.com">www.visitpensacola.com</a>	24%	28%	24%	20%	22%
Viewed Visit Pensacola Facebook	16%	15%	18%	16%	14%
Read Tweets from Visit Pensacola	6%	6%	9%	7%	5%

\* June 2017 – May 2018

Net Communications Reach is at least one of the communication vehicles recalled.

# Spring Communications Trend

	<u>Spring '14</u>		<u>Spring '15</u>		<u>Spring '16</u>		<u>Spring '17</u>		<u>Spring '18</u>
<u>Net Communications Reach</u>	<u>60%</u>		<u>60%</u>	←	<u>53%</u>		<u>49%</u>		<u>51%</u>
Recall advertising	25%	→	33%		36%	←	25%	→	31%
Recall public relations	27%	→	40%	←	32%	←	23%		22%
Visited <a href="http://www.visitpensacola.com">www.visitpensacola.com</a>	22%	→	46%	←	28%		27%	←	22%
Viewed Visit Pensacola Facebook	10%	→	28%	←	21%		22%	←	14%
Read Tweets from Visit Pensacola	1%	→	14%	←	4%		7%		5%

Net Communications Reach is at least one of the communication vehicles recalled.

# Generational Spring Communications

	<u>Centennials</u>	<u>Millennials</u>	<u>Generation X</u>	<u>Baby Boomers</u>	<u>Silent Generation</u>
<u>Net Communications Reach</u>	<u>43%</u>	<u>46%</u>	<u>57%</u>	<u>52%</u>	<u>58%</u>
Recall advertising	34%	27%	34%	33%	33%
Recall public relations	24%	24%	19%	23%	22%
Visited <a href="http://www.visitpensacola.com">www.visitpensacola.com</a>	12%	19%	26%	22%	31%
Viewed Visit Pensacola Facebook	8%	12%	21%	13%	16%
Read Tweets from Visit Pensacola	4%	5%	7%	4%	-

Net Communications Reach is at least one of the communication vehicles recalled.

**Centennials:** Born 1996 -; **Millennials:** Born 1977 to 1995; **Generation X:** Born 1965 to 1976; **Baby Boomers:** Born 1946 to 1964; **Silent Generation:** Born 1945 and before



# Recommendations & Returns

	<u>Rolling Year*</u>	<u>Summer '17</u>	<u>Fall '17</u>	<u>Winter '18</u>	<u>Spring '18</u>
Will Recommend	98%	98%	99%	100%	97%
<u>Will Return</u>	<u>95%</u>	<u>94%</u>	<u>95%</u>	<u>96%</u>	<u>94%</u>
Within 1 year	80%	82%	82%	80%	77%
Within 6 months	32%	32%	34%	32%	30%

\* June 2017 – May 2018

# Spring Recommendations & Returns Trend

	<u>Spring '14</u>	<u>Spring '15</u>	<u>Spring '16</u>	<u>Spring '17</u>	<u>Spring '18</u>
Will Recommend	98%	98%	99%	99%	97%
<u>Will Return</u>	<u>93%</u>	<u>90%</u> →	<u>97%</u>	<u>94%</u>	<u>94%</u>
Within 1 year	72% →	78%	78%	80%	77%
Within 6 months	31%	28%	29%	26%	→ 30%

# Generational Spring Recommendations & Returns

	<u>Centennials</u>	<u>Millennials</u>	<u>Generation X</u>	<u>Baby Boomers</u>	<u>Silent Generation</u>
Will Recommend	96%	97%	97%	97%	100%
<u>Will Return</u>	<u>100%</u>	<u>96%</u>	<u>94%</u>	<u>91%</u>	<u>92%</u>
Within 1 year	85%	79%	76%	73%	72%
Within 6 months	46%	28%	25%	34%	33%

**For Additional Information Contact:**

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