

MAJORITY OPINION

RESEARCH

# Visitor Research Trends 2013 - 2018



October 24, 2018

# Decision Maker Age

**Trend: Steady over 5 years**

## Currently

Average Age of Decision Maker: 44

Spring: 43

Summer: 44

Fall: 45

Winter: 46

# Visitor Household Income

**Trend: Increasing** (11% over 5 years)

## Currently

Average Household Income: \$89,931

Spring:	\$95,354
Summer:	\$95,606
Fall:	\$81,870
Winter:	\$83,666

# Party Size

**Trend: Increasing** (28% over 5 years)

## Currently

Average Party Size: 3.4 persons

Spring: 3.4

Summer: 3.8

Fall: 3.4

Winter: 2.9

# Visiting with Children

**Trend: Increasing** (18% over 5 years)

## Currently

Traveling with Children: 28%

Spring: 28%

Summer: 35%

Fall: 26%

Winter: 20%

# Visiting for Leisure

**Trend: Increasing** (13% over 5 years)

## Currently

Visiting for Leisure: 65%  
(28% visiting family/friends; 7% for business)

Spring: 64%

Summer: 72%

Fall: 62%

Winter: 56%

# Staying in Paid Accommodations

**Trend: Increasing** (2% over 5 years)

## Currently

Staying in Paid Accommodations: 67%

Spring: 70%

Summer: 75%

Fall: 69%

Winter: 58%

# Length of Overnight Stay

**Trend: Decreasing** (6% over 5 years)

## Currently

Average Length of Overnight Stay: 6.3 nights

Spring:	6.5
Summer:	5.0
Fall:	4.3
Winter:	10.7



# Use of the Beach (#1 Activity)

**Trend: Decreasing** (15% over 5 years)

## Currently

Went to the Beach: 76%

Spring: 77%

Summer: 87%

Fall: 72%

Winter: 66%

# Shopping (#2 Activity)

Trend: **Increasing** (12% over 5 years)

## Currently

Shopped: 36%

Spring: 36%

Summer: 40%

Fall: 30%

Winter: 36%

# Visiting Museums (#3 Activity)

**Trend: Decreasing** (15% over 5 years)

## Currently

Visited a Museum: 27%

Spring: 20%

Summer: 31%

Fall: 22%

Winter: 30%

# Fine Dining (#4 Activity)

**Trend: Increasing** (27% over 5 years)

## Currently

Went to a Fine Dining Restaurant: 25%

Spring: 20%

Summer: 27%

Fall: 22%

Winter: 25%

# Fishing (#5 Activity)

**Trend: Increasing** (45% over 5 years)

## Currently

Went Fishing: 14%

Spring: 17%

Summer: 18%

Fall: 12%

Winter: 10%

# Overall Spend

**Trend: Increasing** (35% over 5 years)

## Currently

Average Spend Per Party: \$1,483

Spring: \$1,417

Summer: **\$1,774**

Fall: **\$1,055**

Winter: \$1,452

# Spend per Day

**Trend: Increasing** (43% over 5 years)

## Currently

Average Spend Per Day: \$234

(\$302 if in paid accommodations)

Spring: \$218

Summer: **\$352**

Fall: \$244

Winter: **\$136**

# Number of Visitors

*Using first 6 months of the year (January – June) as an indicator...*

**Trend: Increasing** (33% total over 5 years)  
(61% overnight over 5 years)

*Comparing two most recent complete years...*

2016	2017	Past Year Change
2,073,381	2,683,221	+29%





# Visitor Spending

*Using first 6 months of the year (January – June) as an indicator...*

**Trend: Increasing** (21% total over 5 years)  
(37% overnight over 5 years)

*Comparing two most recent complete years...*

2016	2017	Past Year Change
\$787,186,547	\$802,582,211	+2%



# Visitor Outlook

## Steady average age of decision maker

But look for increasing percentages of Millennials

In 2019, they are expected to pass Baby Boomers in population

And they won't turn into their parents



## Increasingly affluent

Make sure that we have product and provided expected service for them

## Increase of families visiting with children

Make sure that we have product for them

Don't forget about those traveling without kids (72% of visitors)

## Shorter lengths of stay

Promote long weekend getaways, as well as week long or longer vacations

Will require more visitors to maintain and grow occupancy

However, if we can increase length of stay, we will gain an average of \$234 per party.

*Based on 2017 number of visiting parties, that would be a extra \$184,668,739 if everyone was here one extra day. If just got overnight parties to extend their stay by 1 night, it would be an additional \$152,911,771 spent in the county. (overnight visitor spend is roughly \$302 per day)*

# Visitor Outlook

## Decreasing use of the beach

Not necessarily less crowded, just more visitors now doing other things

Still the most utilized asset

Promote what makes Pensacola special in the context of a beach destination

## Increasing number of visitors

But at a seemingly slower pace

Percentage increases decrease as numbers grow

*2% to 4% = 100% increase*

*4% to 6% = 50% increase*

## Increased spending and tax revenue from visitors

Again at a seemingly slower pace

But, well worth the investment in marketing with strong ROI



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