

VISIT PENSACOLA

MONTHLY DASHBOARD

DECEMBER 2025

By Downs & St. Germain Research



VISITOR SUMMARY – DECEMBER 2025¹



Compared to December 2024, in December 2025...

- » Visitor numbers decreased by **-0.9%**.
- » Hotel occupancy was up **+3.2%** and ADR was up **+0.1%**, resulting in a RevPAR that was up **+3.3%**.
- » Hotel room nights were up **+3.5%**.
- » Vacation rental room nights were up **+20.1%** primarily due to the **+13.5%** increase in units.
- » Top markets for this month were **Mobile and Atlanta**.
- » **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.

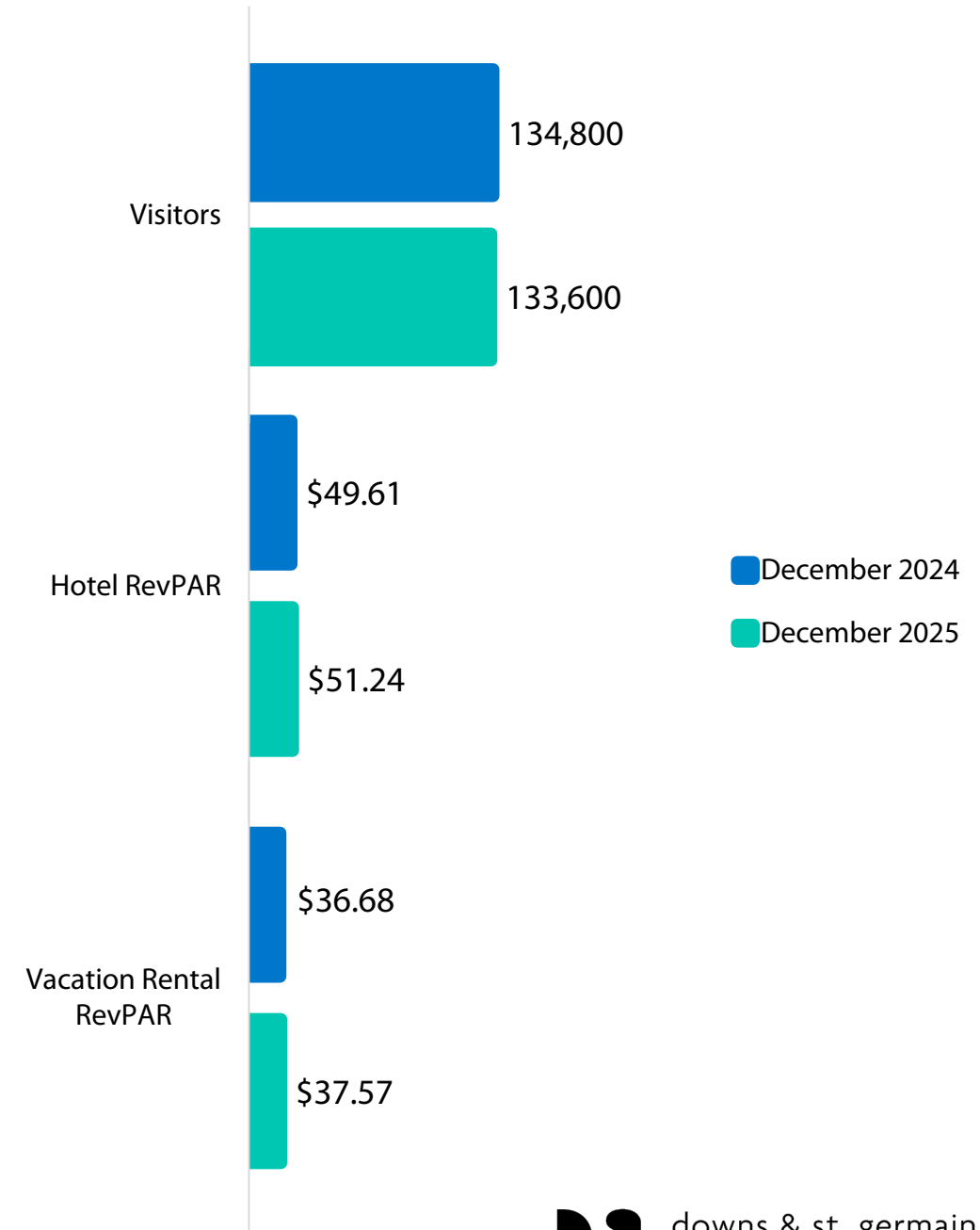
¹ Data should be interpreted with caution as monthly sample sizes are modest resulting in larger month-to-month variation.

PENSACOLA DASHBOARD – DECEMBER 2025

Visitor Statistics	December 2024	December 2025	% Change
Visitors ²	134,800	133,600	-0.9%
Airline Passengers ³	234,269	222,275	-5.1%

Hotel Statistics ⁴	December 2024 ¹	December 2025	% Change
Occupancy	47.9%	49.5%	+3.2%
Room Rates	\$103.55	\$103.62	+0.1%
RevPAR	\$49.61	\$51.24	+3.3%
Room Nights	132,155	136,755	+3.5%

Vacation Rental Statistics ⁵	December 2024 ¹	December 2025	% Change
Occupancy	22.5%	23.8%	+5.8%
Room Rates	\$162.74	\$157.57	-3.2%
RevPAR	\$36.68	\$37.57	+2.4%
Room Nights	15,496	18,606	+20.1%
Unit Revenue (Nightly)	\$1,941,989	\$2,055,439	+5.8%



¹ FY25 metrics have been adjusted to reflect updated lodging figures.

² Visitation estimates provided here are **preliminary**.

Adjustments may be made to these estimates at the end of the quarter, to account for quarterly fluctuations.

Includes visitors staying in paid accommodations, staying with friends & relatives, and day trippers.

³ Source: PNS Airport. Includes all airline travel, i.e., locals and visitors. Tabulated by summing monthly airline travel.

⁴ Source: Smith Travel Research.

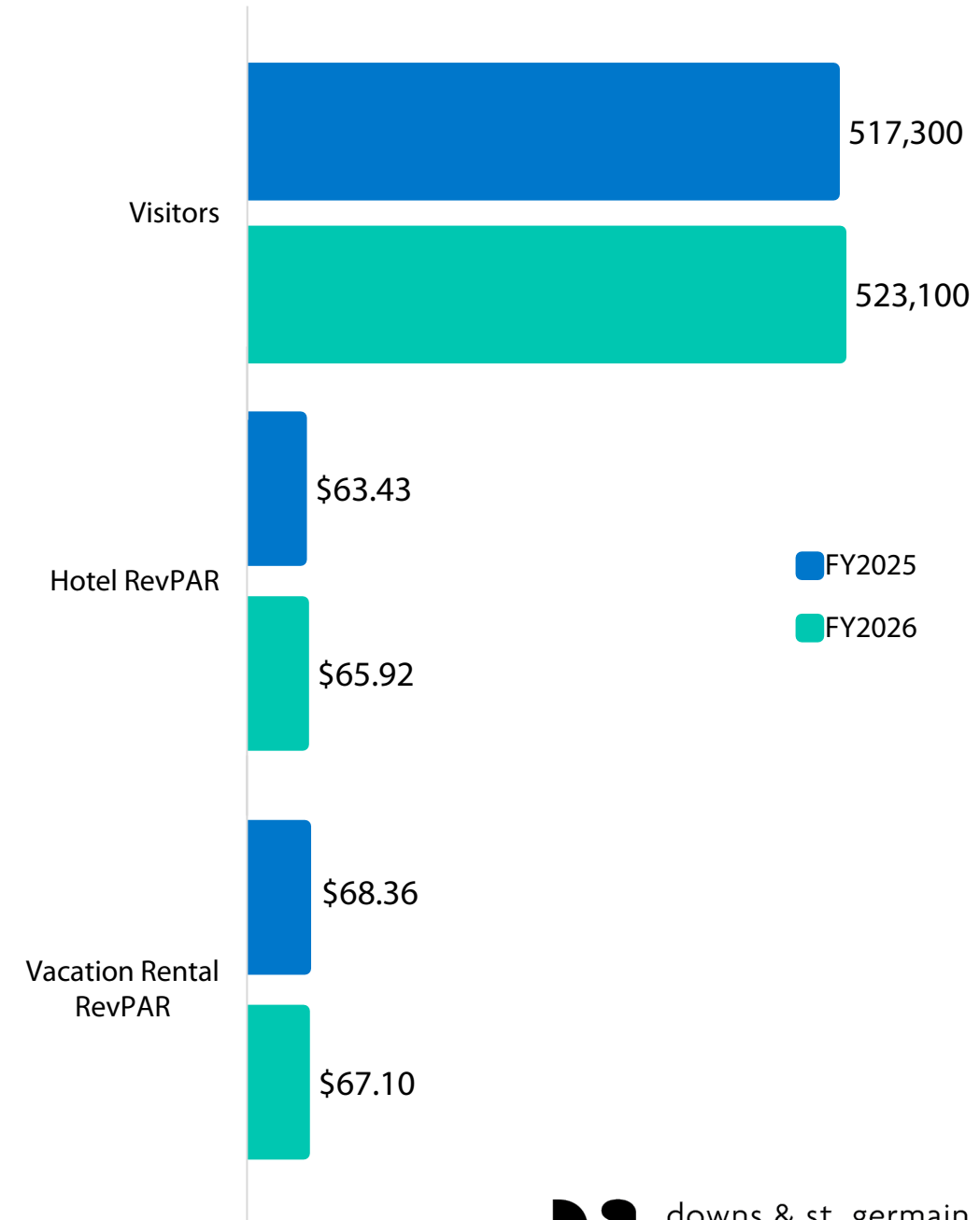
⁵ Sources: Key Data and the Florida Department of Business & Professional Regulation.

PENSACOLA DASHBOARD – FY2026 (OCT 2025 – DEC 2025)

Visitor Statistics	FYTD 2025	FYTD 2026	% Change
Visitors ²	517,300	523,100	+1.1%
Airline Passengers ³	727,910	709,348	-2.6%

Hotel Statistics ⁴	FYTD 2025 ¹	FYTD 2026	% Change
Occupancy	55.1%	56.6%	+2.7%
Room Rates	\$115.15	\$116.55	+1.2%
RevPAR	\$63.43	\$65.92	+3.9%
Room Nights	446,964	463,739	+3.8%

Vacation Rental Statistics ⁵	FYTD 2025 ¹	FYTD 2026	% Change
Occupancy	36.0%	36.1%	+0.4%
Room Rates	\$190.12	\$185.84	-2.2%
RevPAR	\$68.36	\$67.10	-1.8%
Room Nights	73,115	83,153	+13.7%
Unit Revenue (Nightly)	\$11,249,919	\$11,607,808	+3.2%



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³ Source: PNS Airport. Includes all airline travel, i.e., locals and visitors. Tabulated by summing monthly airline travel.

⁴ Source: Smith Travel Research.

⁵ Sources: Key Data and the Florida Department of Business & Professional Regulation.

PENSACOLA DASHBOARD – DECEMBER 2025

TOP VISITOR ORIGIN MARKETS ¹		
Markets	December 2024	December 2025
Mobile ²	22.5%	17.0%
Atlanta	3.9%	3.3%
Birmingham	2.6%	2.5%
Dallas – Fort Worth	1.1%	2.5%
Nashville	2.4%	2.4%
New Orleans	1.3%	2.1%
Chicago	1.4%	1.8%
New York ³	1.1%	1.7%
Kansas City	1.3%	1.5%
Minneapolis – Saint Paul	1.0%	1.5%
Washington, DC – Hagerstown	1.1%	1.5%

¹ Sources: Zartico and Visitor Tracking Study.

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

³New York market includes some areas Connecticut, New Jersey, and Pennsylvania.

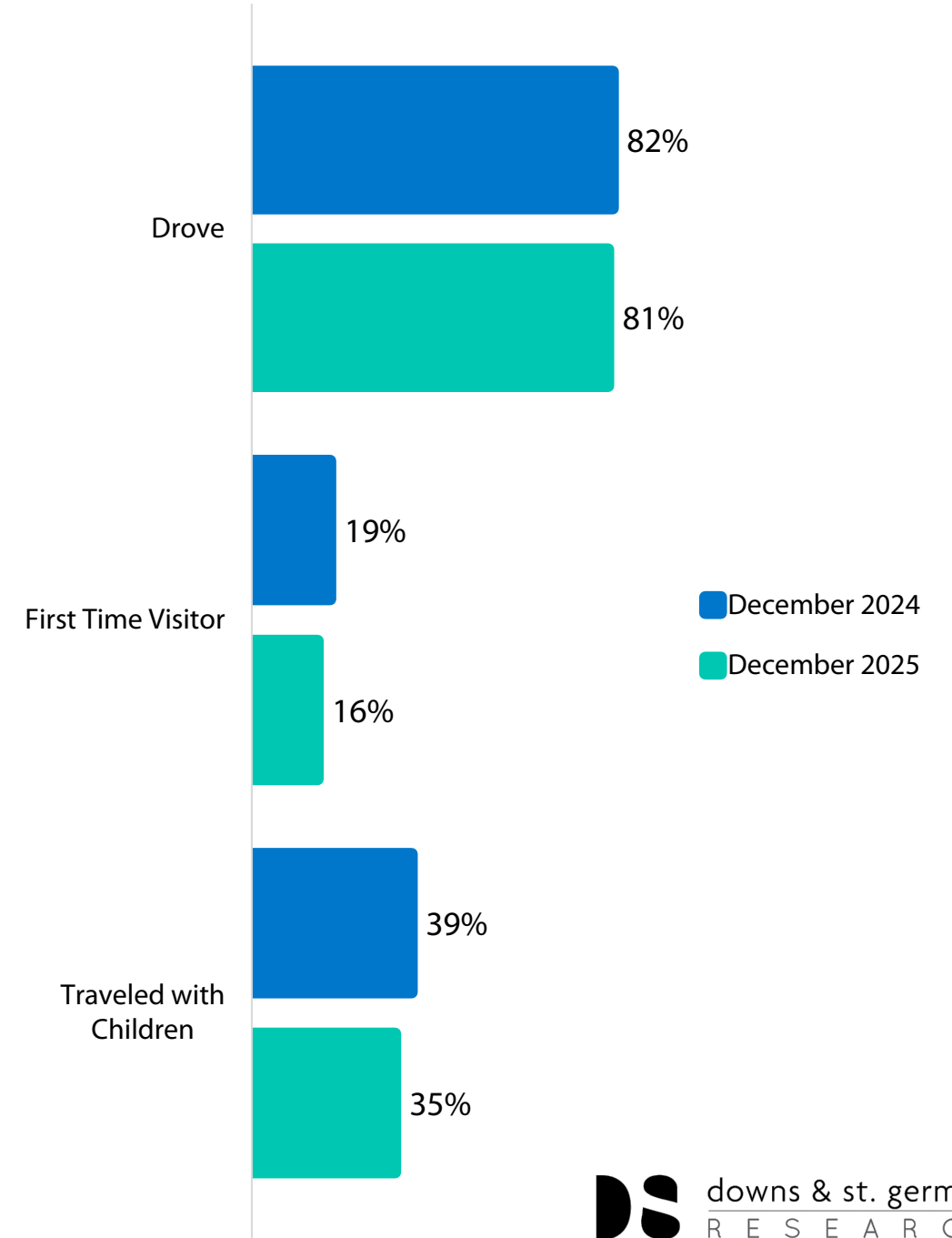
PENSACOLA DASHBOARD – DECEMBER 2025

December Visitors	2024	2025
Stayed in paid accommodations	56%	59%
Drove	82%	81%
Length of stay ¹	5.4	5.1
Will recommend	96%	97%
First time visitor	19%	16%

December Visitors	2024	2025
Median Age ²	45	44
Gender (Female) ²	62%	61%
Household Income	\$83,000	\$85,700
Travel party size ¹	2.8	2.6
Traveled with Children	39%	35%

¹ Visitors staying in Paid Accommodations.

² Age and gender 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.



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