

VISIT PENSACOLA

Monthly Dashboard
July 2025

By Downs & St. Germain Research



VISITOR SUMMARY – JULY 2025¹



Compared to July 2024, in July 2025...

- » Visitor numbers decreased by **-6.4%** due to smaller travel party sizes.
- » Airline passengers decreased by **-2.0%**.
- » Hotel occupancy was up **+0.7%** and ADR was up **+2.1%**, resulting in a RevPAR that was up **+2.8%**.
- » Hotel room nights were up **+3.6%**.
- » Vacation rental room nights were down **-7.8%** primarily due to the **-8.8%** decrease in units.
- » Top markets for this month were **Mobile, Atlanta, New Orleans, and Dallas-Fort Worth**.
- » **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 – JULY 2025

Visitor Statistics	July 2024	July2025	% Change
Visitors ²	317,200	296,800	-6.4%
Airline Passengers ³	330,417	323,727	-2.0%

Hotel Statistics ⁴	July 2024 ¹	July 2025	% Change
Occupancy	74.9%	75.4%	+0.7%
Room Rates	\$192.74	\$196.76	+2.1%
RevPAR	\$144.39	\$148.42	+2.8%
Room Nights	200,622	207,760	+3.6%

Vacation Rental Statistics ⁵	July 2024 ¹	July 2025	% Change
Occupancy	80.6%	81.5%	+1.1%
Room Rates	\$419.43	\$423.59	+1.0%
RevPAR	\$338.07	\$345.26	+2.1%
Room Nights	69,238	63,850	-7.8%
Unit Revenue (Nightly)	\$19,366,344	\$20,329,770	+5.0%

¹ FY24 metrics have been adjusted to reflect updated lodging figures.

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

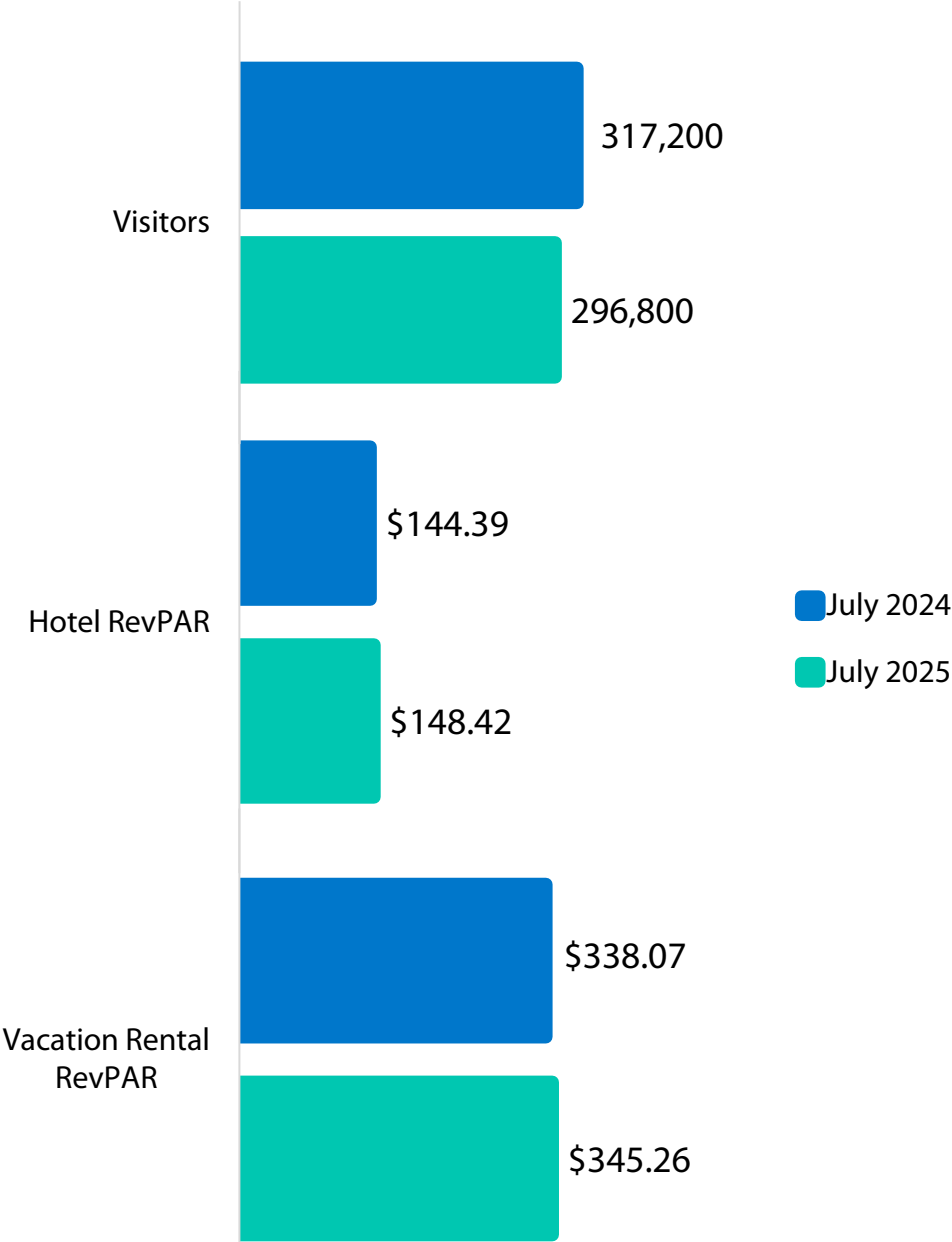
Adjustments may be made to these estimates at the end of the quarter, to account for quarterly fluctuations.

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 – FY2025

(OCT 2024 - JUL 2025)

Visitor Statistics	FYTD 2024	FYTD 2025	% Change
Visitors ²	2,106,000	2,043,500	-3.0%
Airline Passengers ³	2,510,289	2,582,263	+2.9%

Hotel Statistics ⁴	FYTD 2024 ¹	FYTD 2025	% Change
Occupancy	62.5%	62.6%	+0.2%
Room Rates	\$136.96	\$138.07	+0.8%
RevPAR	\$85.56	\$86.39	+1.0%
Room Nights	1,609,917	1,681,858	+4.5%

Vacation Rental Statistics ⁵	FYTD 2024 ¹	FYTD 2025	% Change
Occupancy	55.2%	54.5%	-1.3%
Room Rates	\$225.45	\$234.71	+4.1%
RevPAR	\$124.52	\$127.92	+2.7%
Room Nights	446,193	395,900	-11.3%
Unit Revenue (Nightly)	\$75,469,400	\$80,442,000	+6.6%

¹ FY24 metrics have been adjusted to reflect updated lodging figures.

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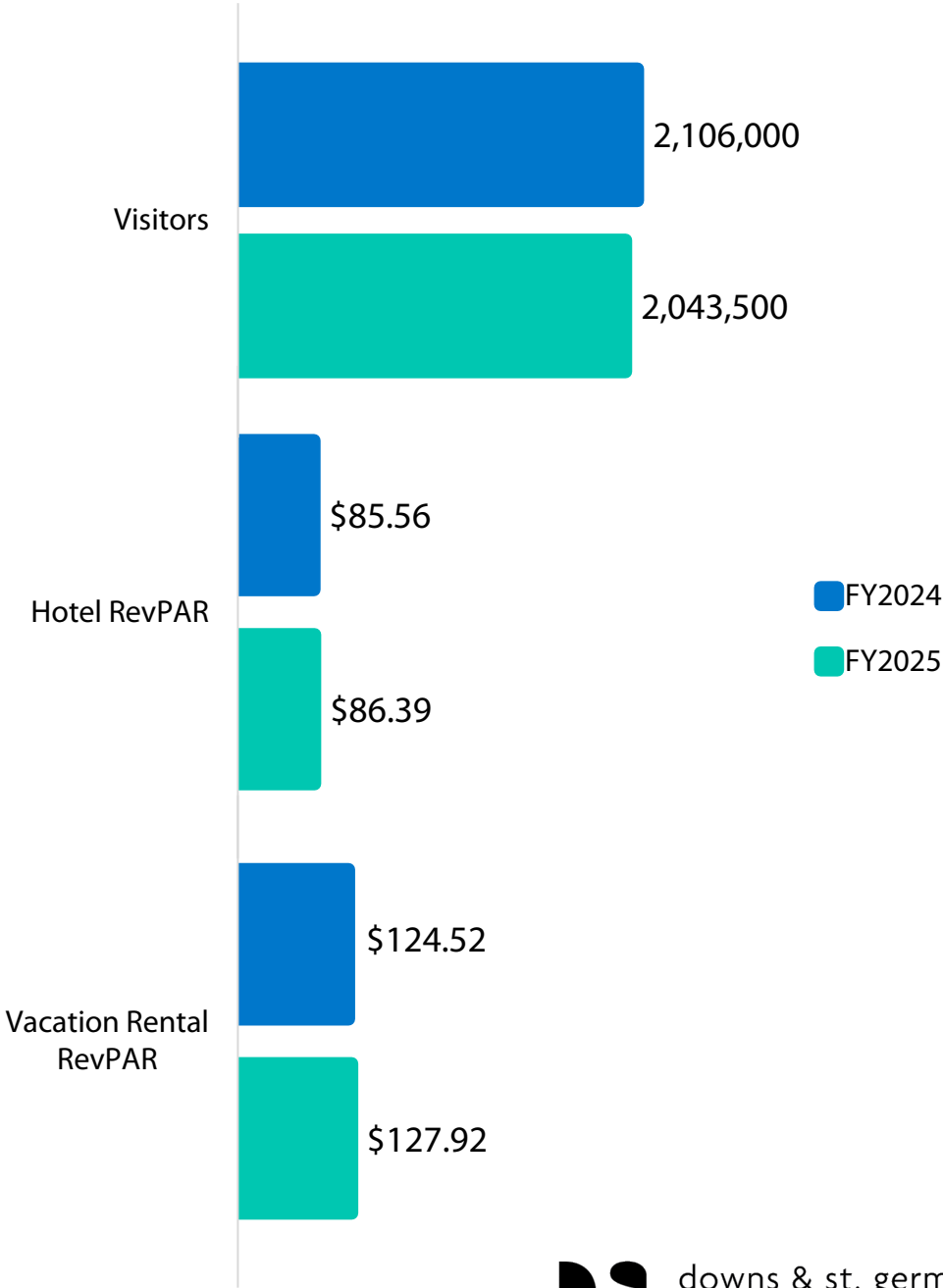
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PENSACOLA DASHBOARD – JULY 2025

TOP VISITOR ORIGIN MARKETS		
Markets	July 2024	July 2025 ¹
Mobile ²	13%	12%
Atlanta	5%	4%
New Orleans	3%	4%
Dallas – Fort Worth	4%	4%
Birmingham	2%	3%
Houston	2%	2%
Nashville	2%	2%
Charlotte	1%	2%
Saint Louis	1%	2%
Little Rock – Pine Bluff	2%	2%
New York ³	2%	2%
Montgomery – Selma	1%	2%
Orlando – Daytona Beach – Melbourne	1%	2%

¹ Sources: Zartico and Visitor Tracking Study.

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

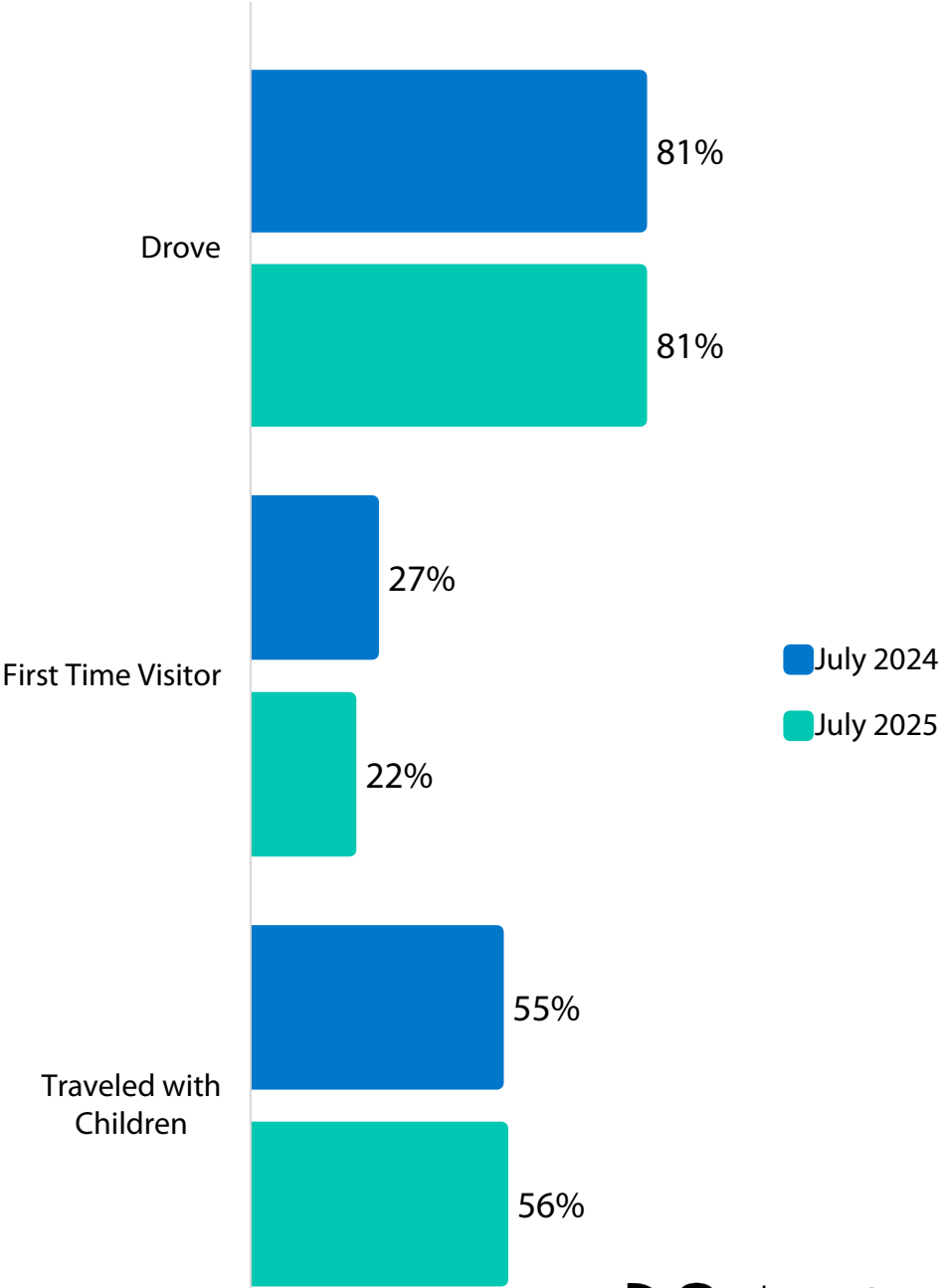
³New York DMA includes some areas in Connecticut, New Jersey, and Pennsylvania.

PENSACOLA DASHBOARD – JULY 2025

July Visitors	2024	2025
Stayed in paid accommodations	68%	67%
Drove	81%	81%
Length of stay ¹	4.5	4.5
Will recommend	95%	97%
First time visitor	27%	22%

July Visitors	2024	2025
Median Age	42	45
Gender (Female) ²	60%	64%
Household Income	\$86,900	\$92,700
Travel party size ¹	3.6	3.3
Traveled with Children	55%	56%

¹ Visitors staying in Paid Accommodations.
² May be influenced by visitor’s willingness to complete a survey.



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