

VISIT PENSACOLA

Monthly Dashboard
May 2025

By Downs & St. Germain Research



VISITOR SUMMARY – MAY 2025¹



Compared to May 2024, in May 2025...

- » Visitor numbers decreased by **-2.5%**, however, a higher percentage of visitors stayed in paid accommodations.
- » Airline passengers increased by **+4.1%**.
- » Hotel occupancy was up **+1.3%** and ADR was up **+2.1%**, resulting in a RevPAR that was up **+3.5%**.
- » Hotel room nights were up **+6.6%**.
- » Vacation rental room nights were down **-8.5%** primarily due to the **-10.3%** decrease in units.
- » Top markets for this month were **Mobile, Birmingham, New Orleans, 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.

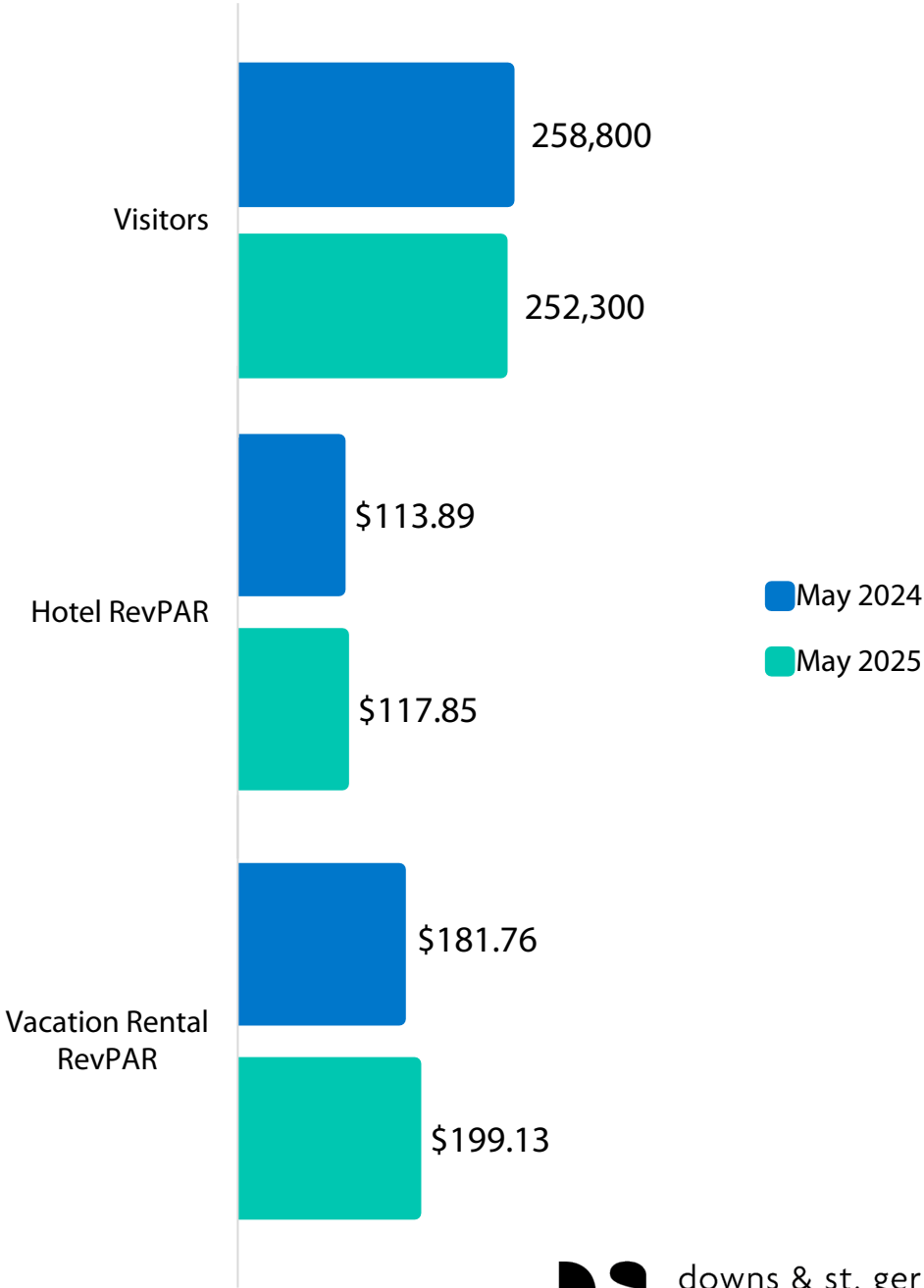
¹ Data should be interpreted with caution as monthly sample sizes are modest resulting in larger month-to-month variation.

PENSACOLA DASHBOARD – MAY 2025

Visitor Statistics	May 2024	May 2025	% Change
Visitors ²	258,800	252,300	-2.5%
Airline Passengers ³	303,950	316,517	+4.1%

Hotel Statistics ⁴	May 2024 ¹	May 2025	% Change
Occupancy	71.5%	72.5%	+1.3%
Room Rates	\$159.20	\$162.61	+2.1%
RevPAR	\$113.89	\$117.85	+3.5%
Room Nights	187,342	199,627	+6.6%

Vacation Rental Statistics ⁵	May 2024 ¹	May 2025	% Change
Occupancy	65.0%	66.3%	+2.0%
Room Rates	\$279.56	\$300.21	+7.4%
RevPAR	\$181.76	\$199.13	+9.6%
Room Nights	54,964	50,297	-8.5%
Unit Revenue (Nightly)	\$10,087,115	\$11,328,658	+12.3%



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 - MAY 2025)

Visitor Statistics	FYTD 2024	FYTD 2025	% Change
Visitors ²	1,470,900	1,447,000	-1.6%
Airline Passengers ³	1,853,067	1,942,010	+4.8%

Hotel Statistics ⁴	FYTD 2024 ¹	FYTD 2025	% Change
Occupancy	59.2%	59.4%	+0.3%
Room Rates	\$124.57	\$125.44	+0.7%
RevPAR	\$73.74	\$74.50	+1.0%
Room Nights	1,214,198	1,273,752	+4.9%

Vacation Rental Statistics ⁵	FYTD 2024 ¹	FYTD 2025	% Change
Occupancy	49.0%	47.8%	-2.5%
Room Rates	\$178.65	\$188.70	+5.6%
RevPAR	\$87.61	\$90.19	+2.9%
Room Nights	311,295	270,648	-13.1%
Unit Revenue (Nightly)	\$38,056,000	\$40,766,500	+7.1%

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

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

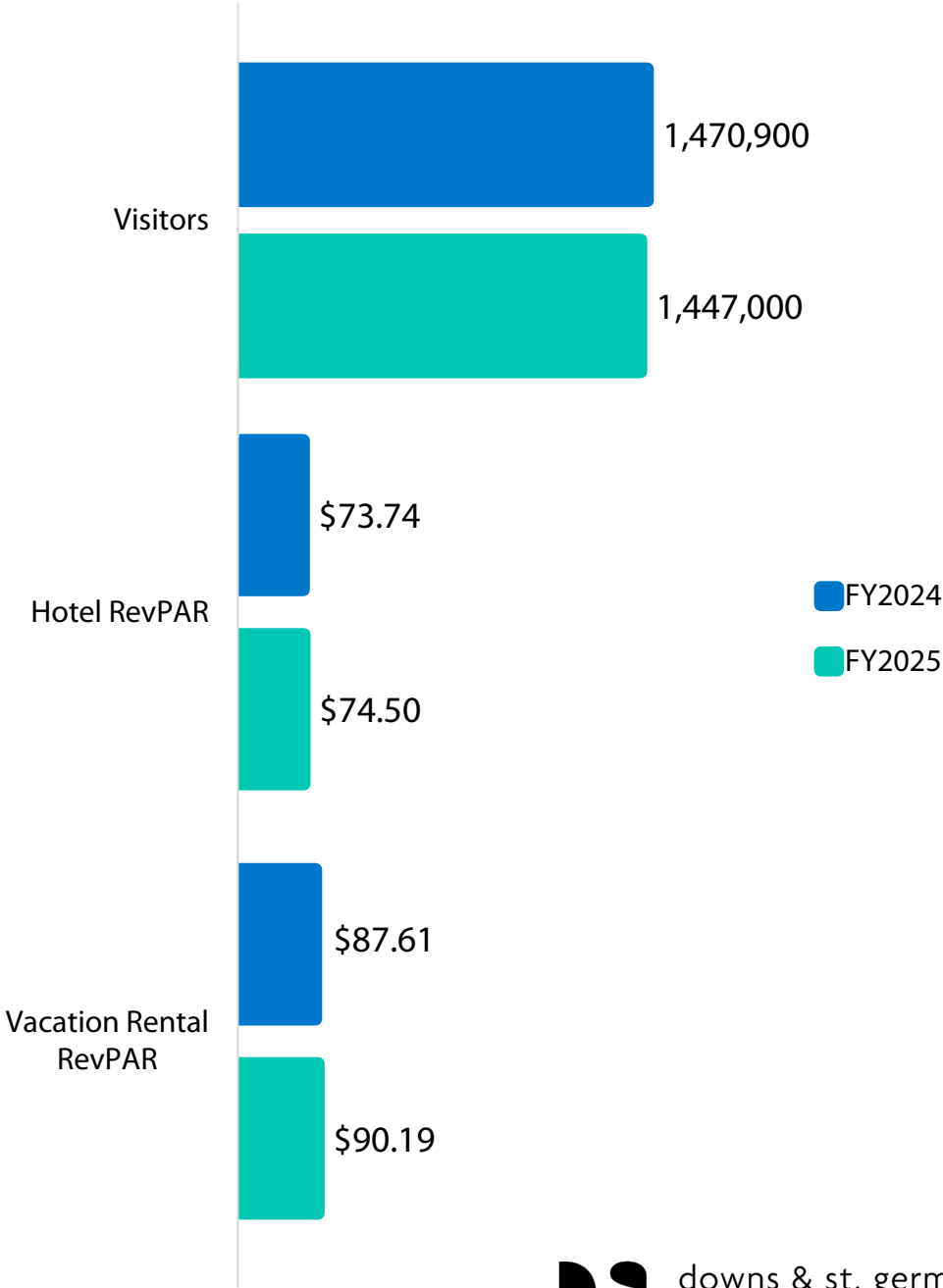
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PENSACOLA DASHBOARD – MAY 2025

TOP VISITOR ORIGIN MARKETS		
Markets	May 2024	May 2025 ¹
Mobile, AL	14%	13%
Birmingham, AL	4%	4%
New Orleans, LA	3%	4%
Atlanta, GA	4%	4%
Nashville, TN	3%	3%
Dallas – Fort Worth, TX	3%	2%
Panama City, FL	1%	2%
New York, NY	1%	2%
St. Louis, MO	2%	2%

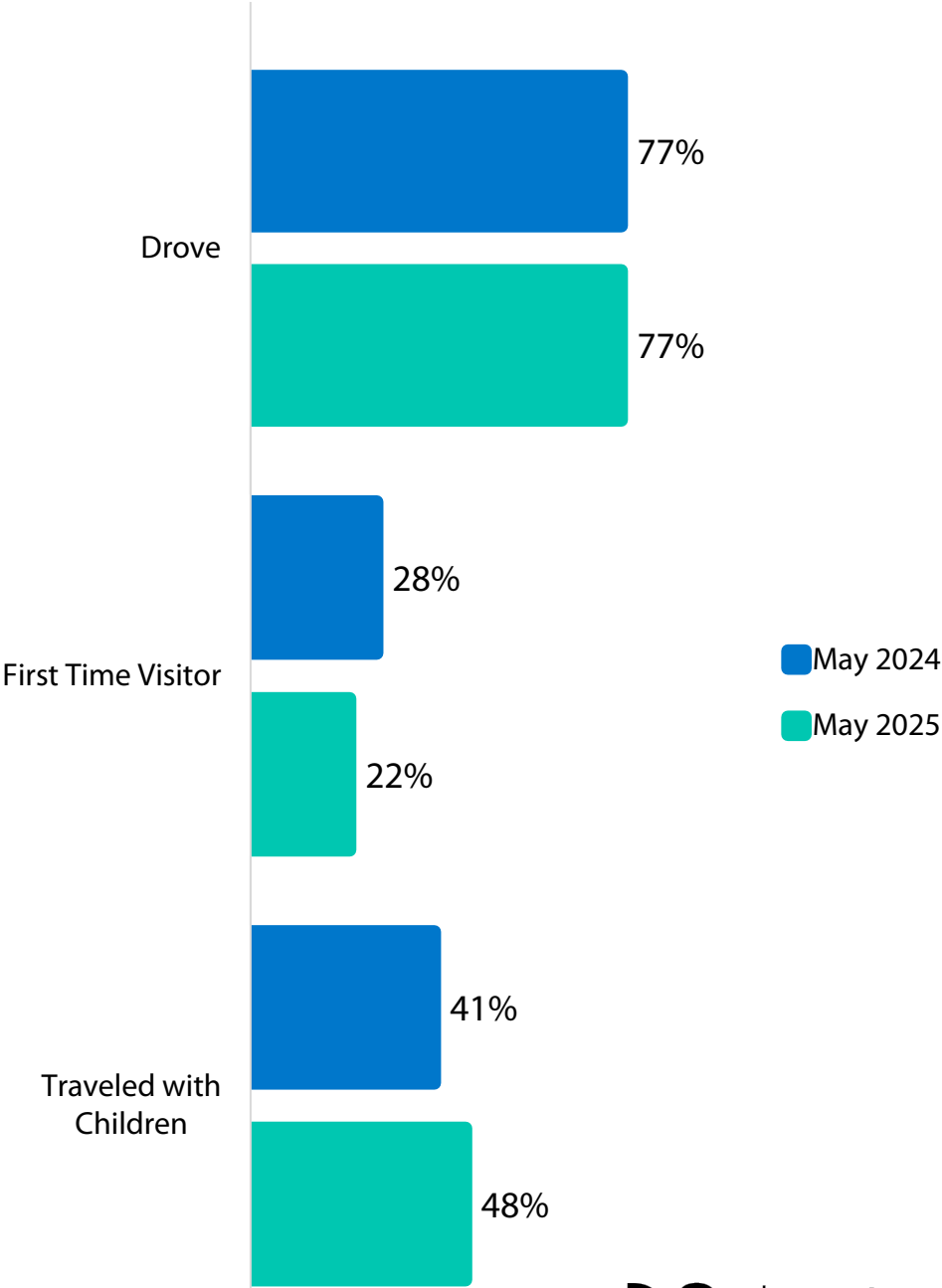
¹ Sources: Zartico and Visitor Tracking Study.

PENSACOLA DASHBOARD – MAY 2025

May Visitors	2024	2025
Stayed in paid accommodations	65%	69%
Drove	77%	77%
Length of stay ¹	4.3	4.3
Will recommend	93%	96%
First time visitor	28%	22%

May Visitors	2024	2025
Median Age	43	42
Gender (Female) ²	59%	55%
Household Income	\$82,100	\$88,100
Travel party size ¹	3.0	3.0
Traveled with Children	41%	48%

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



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