

VISIT PENSACOLA

MONTHLY DASHBOARD

NOVEMBER 2025

By Downs & St. Germain Research



VISITOR SUMMARY – NOVEMBER 2025¹



Compared to November 2024, in November 2025...

- » Visitor numbers increased by **+3.6%**.
- » Hotel occupancy was up **+5.8%** and ADR was down **-3.4%**, resulting in a RevPAR that was up **+2.2%**.
- » Hotel room nights were up **+7.0%**.
- » Vacation rental room nights were up **+9.9%** primarily due to the **+13.1%** increase in units.
- » Top markets for this month were **Mobile, Atlanta, and New Orleans**.
- » **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 – NOVEMBER 2025

Visitor Statistics	November 2024	November 2025	% Change
Visitors ²	159,200	164,900	+3.6%
Airline Passengers ³	230,015	216,939	-5.7%

Hotel Statistics ⁴	November 2024 ¹	November 2025	% Change
Occupancy	53.4%	56.5%	+5.8%
Room Rates	\$114.14	\$110.22	-3.4%
RevPAR	\$60.95	\$62.28	+2.2%
Room Nights	141,072	150,987	+7.0%

Vacation Rental Statistics ⁵	November 2024 ¹	November 2025	% Change
Occupancy	32.1%	31.2%	-2.9%
Room Rates	\$182.72	\$175.90	-3.7%
RevPAR	\$58.64	\$54.84	-6.5%
Room Nights	21,259	23,362	+9.9%
Unit Revenue (Nightly)	\$2,969,224	\$2,916,482	-1.8%

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

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

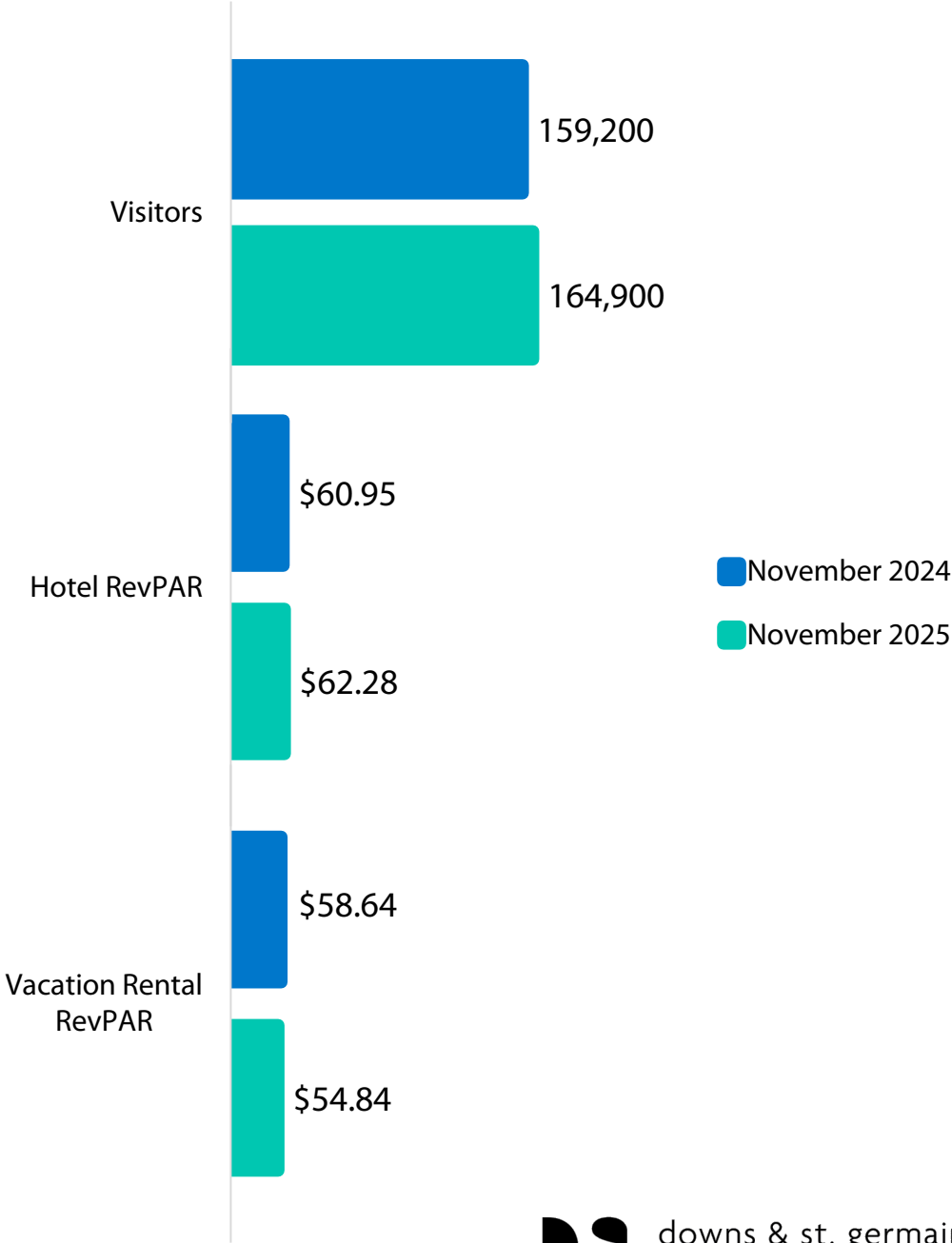
Adjustments may be made to these estimates at the end of the quarter, to account for quarterly fluctuations.

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 – NOV 2025)

Visitor Statistics	FYTD 2025	FYTD 2026	% Change
Visitors ²	382,500	393,900	+3.0%
Airline Passengers ³	493,641	487,073	-1.3%

Hotel Statistics ⁴	FYTD 2025 ¹	FYTD 2026	% Change
Occupancy	58.7%	60.1%	+2.5%
Room Rates	\$120.95	\$123.01	+1.7%
RevPAR	\$70.97	\$73.96	+4.2%
Room Nights	314,809	326,984	+3.9%

Vacation Rental Statistics ⁵	FYTD 2025 ¹	FYTD 2026	% Change
Occupancy	42.7%	42.2%	-1.0%
Room Rates	\$203.80	\$199.98	-1.9%
RevPAR	\$86.96	\$84.46	-2.9%
Room Nights	57,619	64,547	+12.0%
Unit Revenue (Nightly)	\$9,307,929	\$9,552,369	+2.6%

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

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

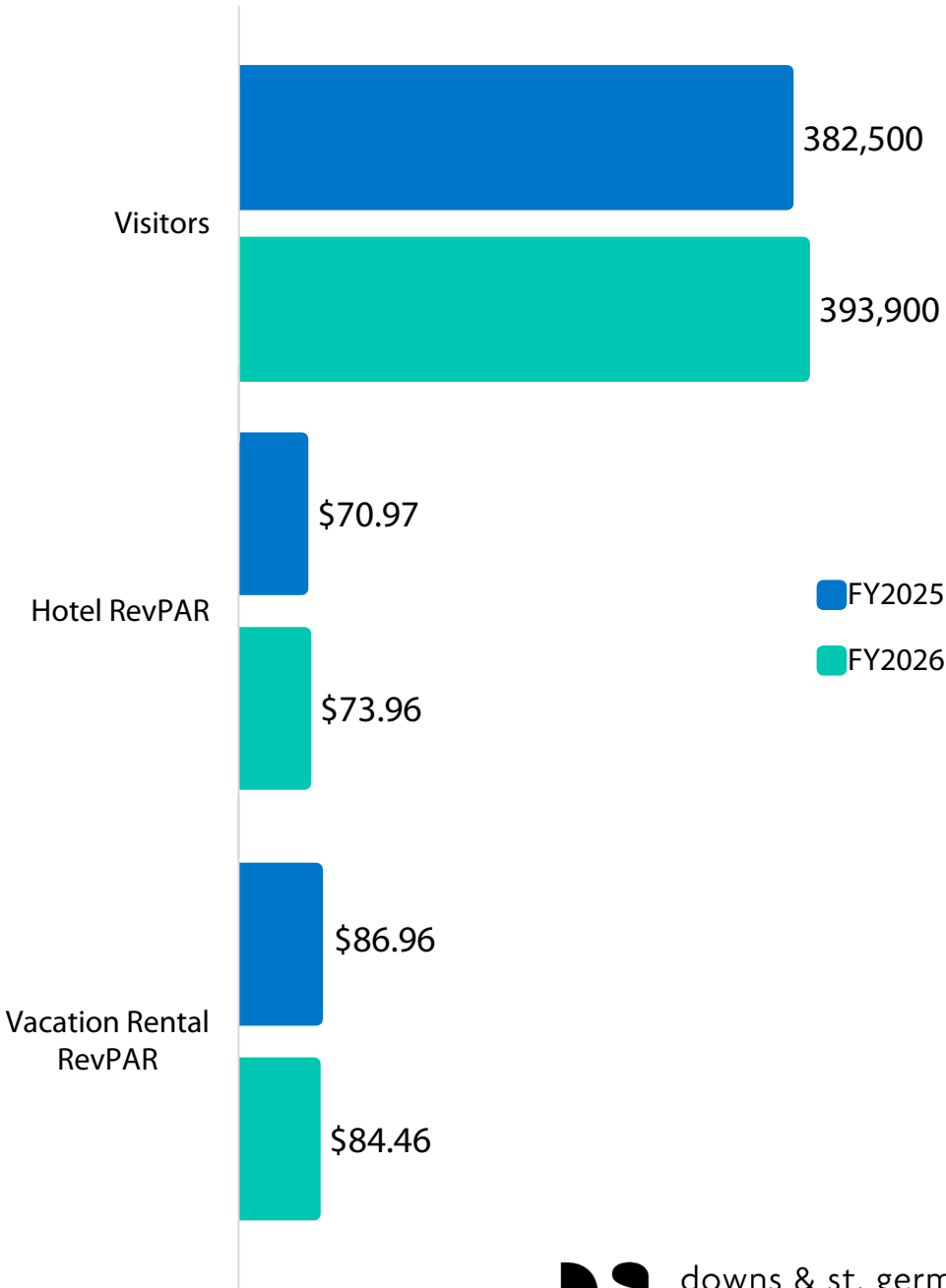
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Includes visitors staying in paid accommodations, staying with friends & relatives, and day trippers.

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 – NOVEMBER 2025

TOP VISITOR ORIGIN MARKETS ¹		
Markets	November 2024	November 2025
Mobile ²	13%	15%
Atlanta	5%	6%
New Orleans	3%	5%
Dallas – Fort Worth	2%	4%
Birmingham	4%	4%
Nashville	3%	3%

¹ Sources: Zartico and Visitor Tracking Study.

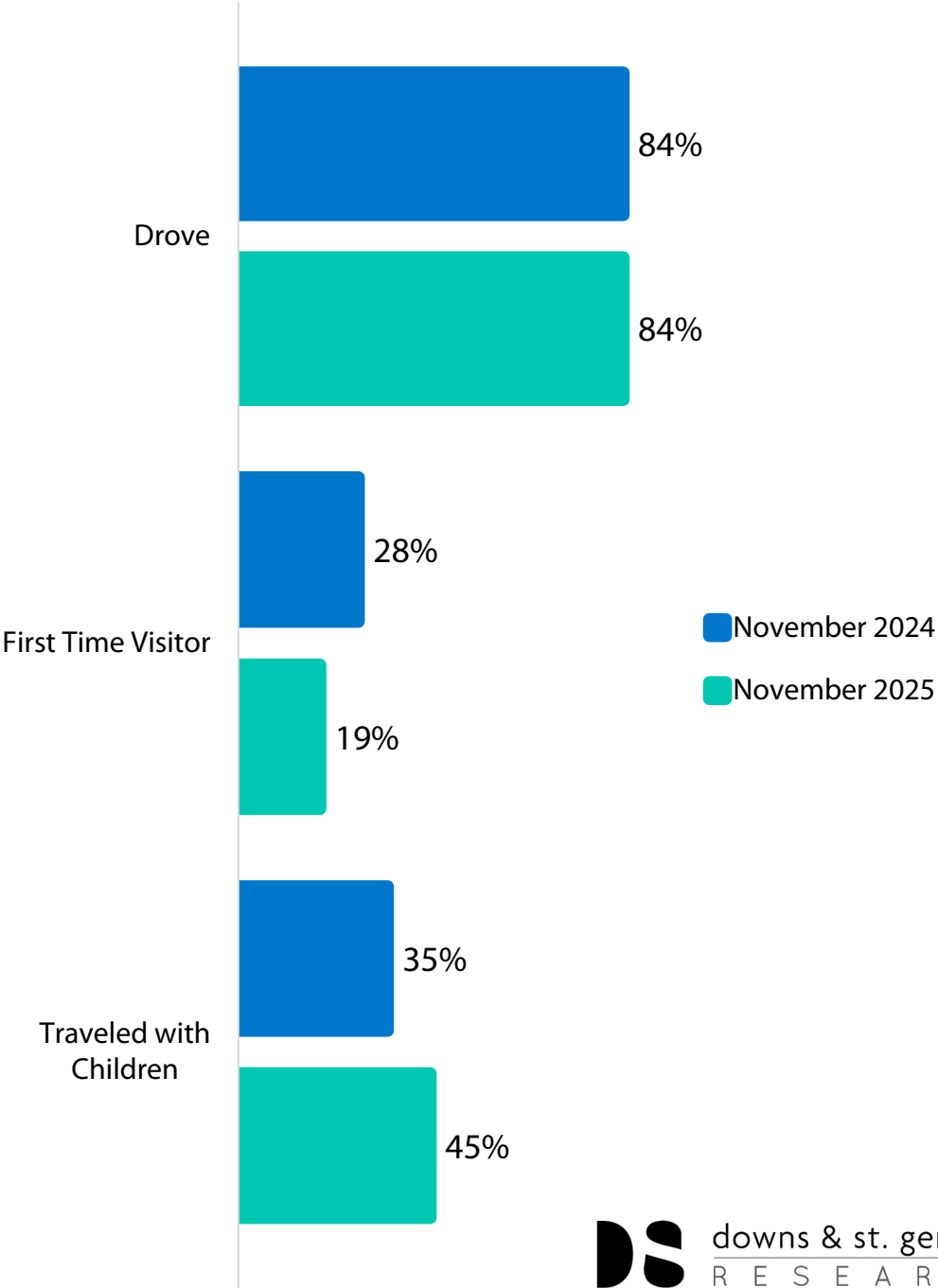
² Mobile DMA spans across Florida, Alabama, and Mississippi.

PENSACOLA DASHBOARD – NOVEMBER 2025

November Visitors	2024	2025
Stayed in paid accommodations	57%	62%
Drove	84%	84%
Length of stay ¹	4.8	4.5
Will recommend	96%	98%
First time visitor	28%	19%

November Visitors	2024	2025
Median Age	47	46
Gender (Female) ²	58%	60%
Household Income	\$87,800	\$88,900
Travel party size ¹	2.7	2.6
Traveled with Children	35%	45%

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



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