

VISIT PENSACOLA

MONTHLY DASHBOARD

OCTOBER 2025

By Downs & St. Germain Research



VISITOR SUMMARY – OCTOBER 2025¹

Compared to October 2024, in October 2025...

- » Visitor numbers increased by **+2.6%**.
- » Hotel occupancy was down **-0.3%** and ADR was up **+6.3%**, resulting in a RevPAR that was up **+5.9%**.
- » Hotel room nights were up **+1.3%**.
- » Vacation rental room nights were up **+13.3%** primarily due to the **+13.2%** increase in units.
- » Top markets for this month were **Mobile, 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 – OCTOBER 2025

Visitor Statistics	October 2024	October 2025	% Change
Visitors ²	223,300	229,000	+2.6%
Airline Passengers ³	263,626	-	-

Hotel Statistics ⁴	October 2024 ¹	October 2025	% Change
Occupancy	64.0%	63.7%	-0.3%
Room Rates	\$127.76	\$135.80	+6.3%
RevPAR	\$81.71	\$86.56	+5.9%
Room Nights	173,737	175,997	+1.3%

Vacation Rental Statistics ⁵	October 2024 ¹	October 2025	% Change
Occupancy	53.2%	53.3%	+0.1%
Room Rates	\$224.89	\$224.06	-0.4%
RevPAR	\$119.73	\$119.41	-0.3%
Room Nights	36,359	41,186	+13.3%
Unit Revenue (Nightly)	\$6,338,705	\$6,635,887	+4.7%

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

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

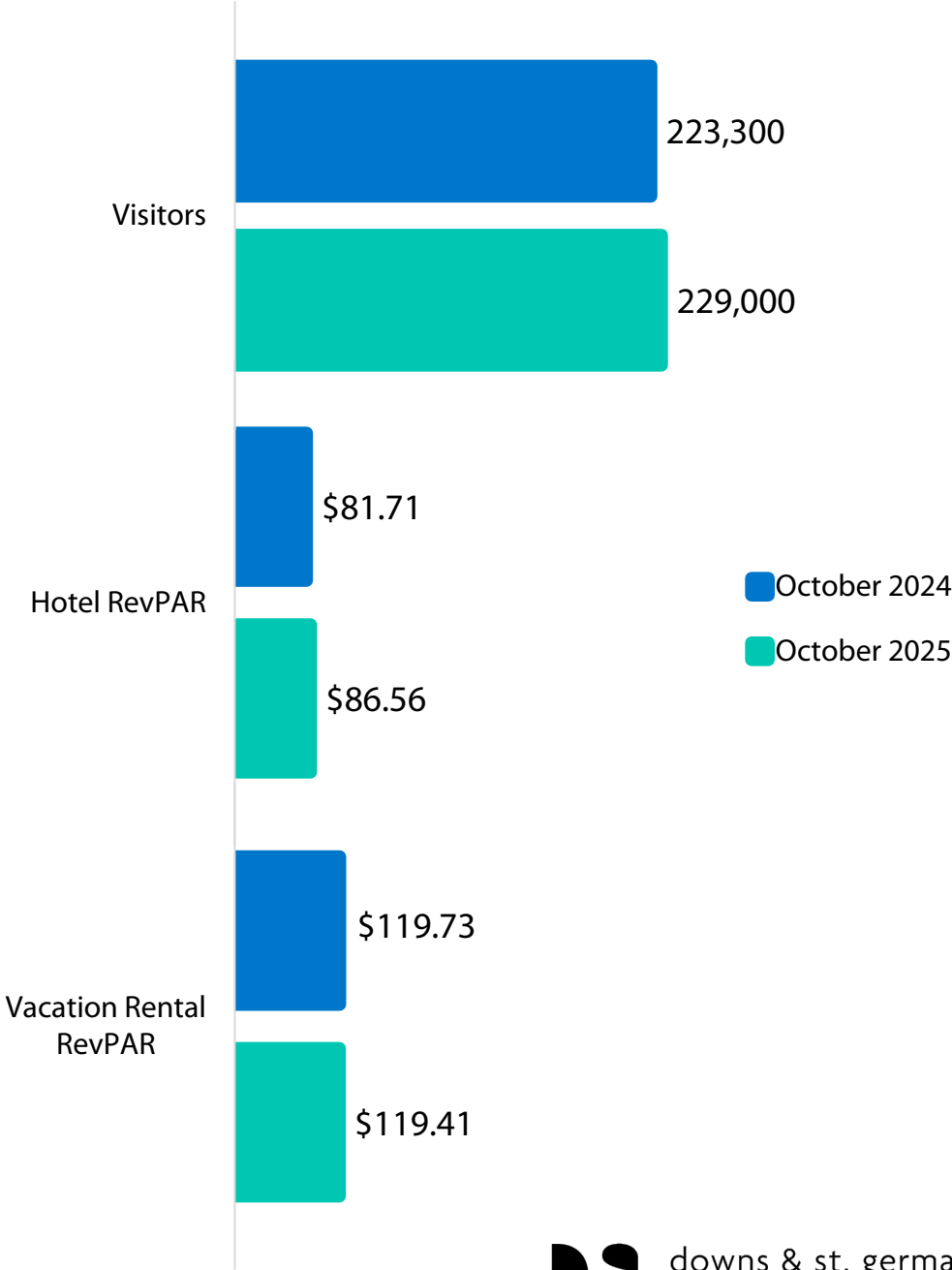
Adjustments may be made to these estimates at the end of the quarter, to account for quarterly fluctuations.

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)

Visitor Statistics	FYTD 2025	FYTD 2026	% Change
Visitors ²	223,300	229,000	+2.6%
Airline Passengers ³	263,626	-	-

Hotel Statistics ⁴	FYTD 2025 ¹	FYTD 2026	% Change
Occupancy	64.0%	63.7%	-0.3%
Room Rates	\$127.76	\$135.80	+6.3%
RevPAR	\$81.71	\$86.56	+5.9%
Room Nights	173,737	175,997	+1.3%

Vacation Rental Statistics ⁵	FYTD 2025 ¹	FYTD 2026	% Change
Occupancy	53.2%	53.3%	+0.1%
Room Rates	\$224.89	\$224.06	-0.4%
RevPAR	\$119.73	\$119.41	-0.3%
Room Nights	36,359	41,186	+13.3%
Unit Revenue (Nightly)	\$6,338,705	\$6,635,887	+4.7%

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.

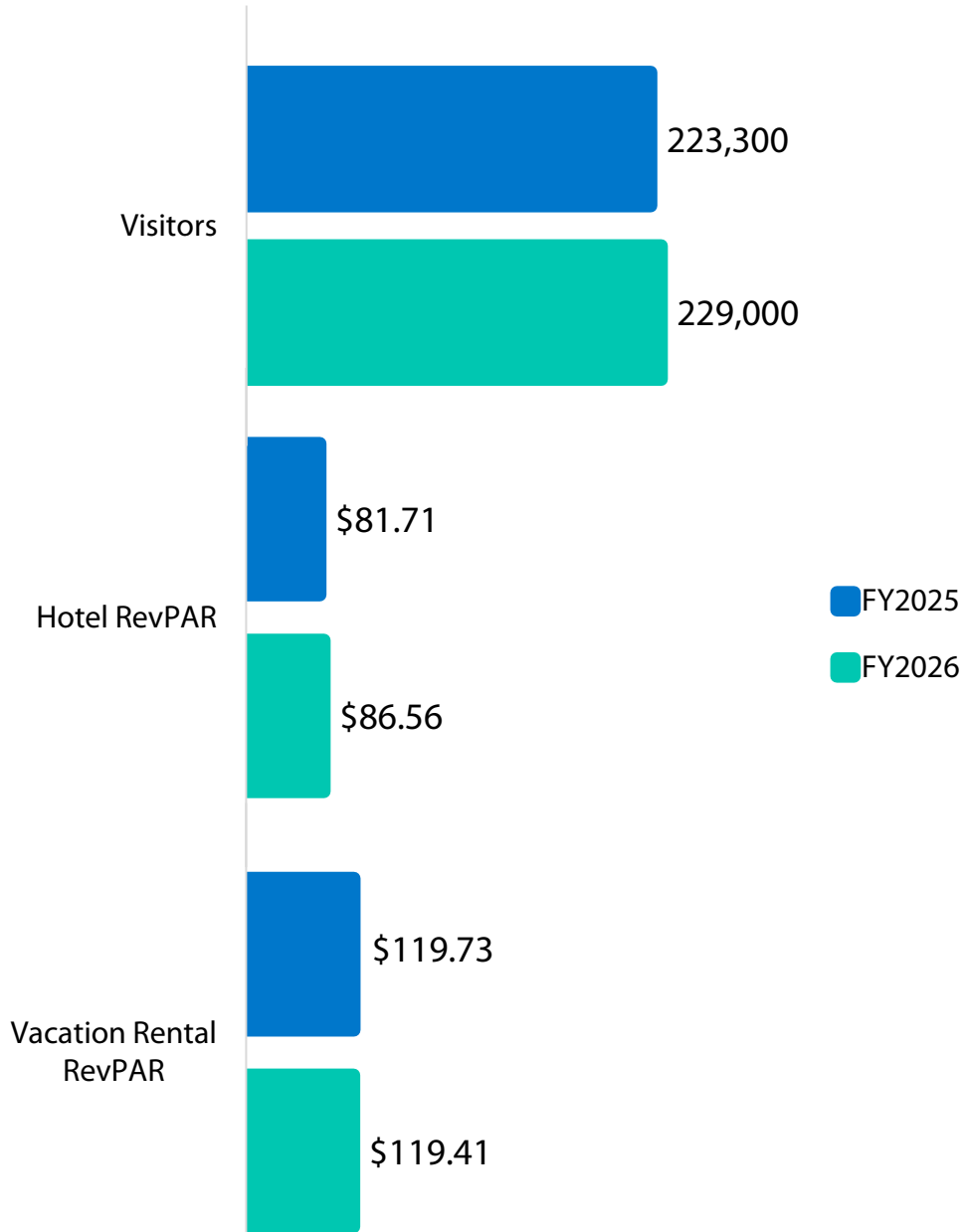
Includes visitors staying in paid accommodations, staying with friends & relatives, and day trippers.

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.

4



PENSACOLA DASHBOARD – OCTOBER 2025

TOP VISITOR ORIGIN MARKETS		
Markets	October 2024	October 2025 ¹
Mobile ²	16%	17%
New Orleans	3%	3%
Atlanta	4%	3%
Birmingham	3%	3%
Nashville	4%	2%
Houston	2%	2%
Dallas – Fort Worth	2%	2%
Panama City	1%	2%

¹ Sources: Zartico and Visitor Tracking Study.

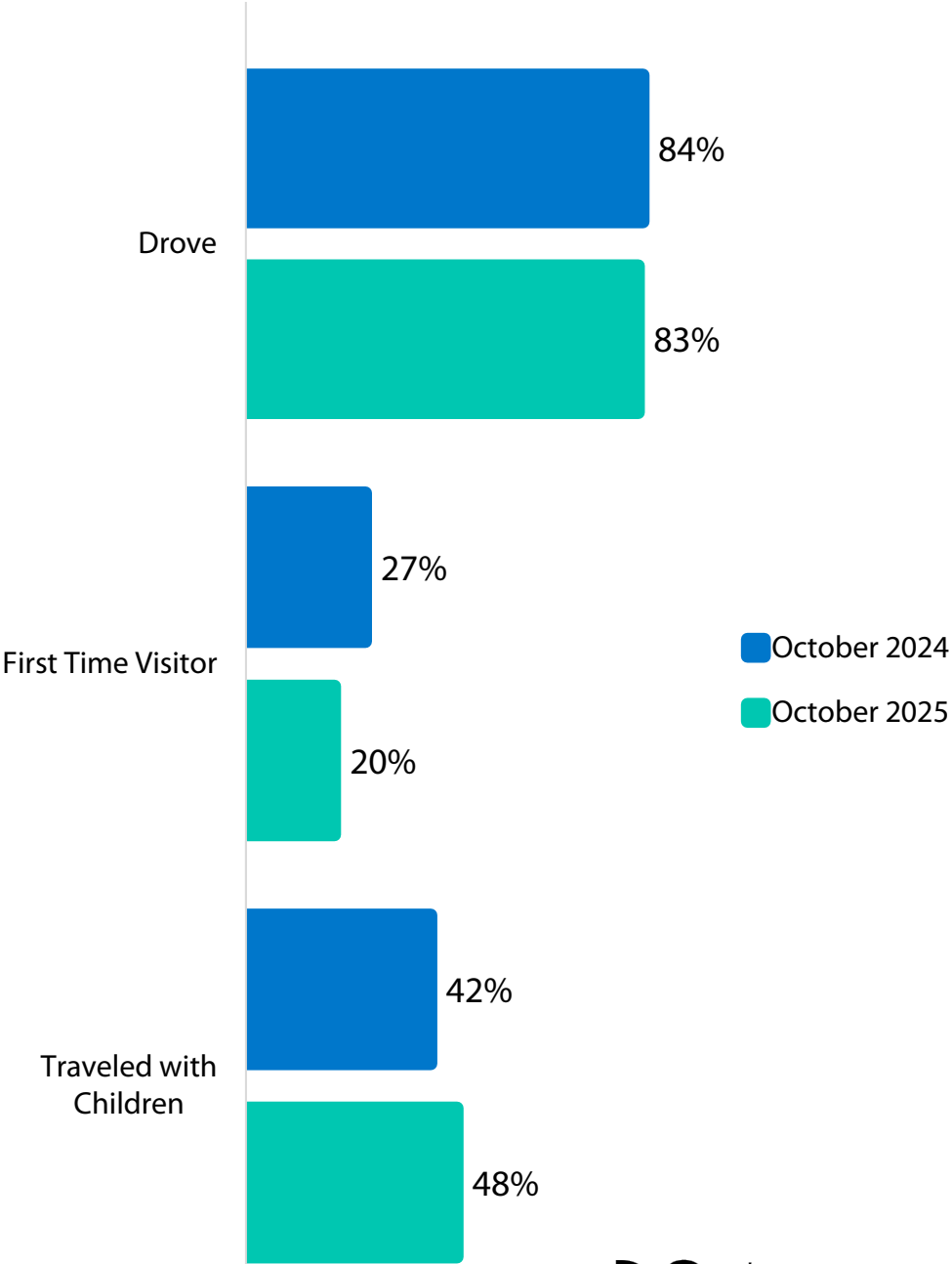
² Mobile DMA spans across Florida, Alabama, and Mississippi.

PENSACOLA DASHBOARD – OCTOBER 2025

October Visitors	2024	2025
Stayed in paid accommodations	54%	53%
Drove	84%	83%
Length of stay ¹	5.1	4.5
Will recommend	96%	97%
First time visitor	27%	20%

October Visitors	2024	2025
Median Age	45	44
Gender (Female) ²	64%	62%
Household Income	\$88,100	\$83,000
Travel party size ¹	2.9	2.5
Traveled with Children	42%	48%

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



VISIT PENSACOLA

MONTHLY DASHBOARD

SEPTEMBER 2025

Downs & St. Germain Research
contact@dsg-research.com
850-906-3111 | www.dsg-research.com

