

VISIT PENSACOLA

MONTHLY DASHBOARD

SEPTEMBER 2025

By Downs & St. Germain Research



VISITOR SUMMARY – SEPTEMBER 2025¹

Compared to September 2024, in September 2025...

- » Visitor numbers decreased by **-1.7%** due to smaller travel party sizes.
- » Airline passengers increased by **+4.1%**.
- » Hotel occupancy was down **-0.6%** and ADR was up **+5.0%**, resulting in a RevPAR that was up **+4.4%**.
- » Hotel room nights were up **+1.0%**.
- » Vacation rental room nights were down **-12.5%** primarily due to the **-10.8%** decrease 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 – SEPTEMBER 2025

Visitor Statistics	September 2024	September 2025	% Change
Visitors ²	210,100	206,600	-1.7%
Airline Passengers ³	244,874	254,879	+4.1%

Hotel Statistics ⁴	September 2024 ¹	September 2025	% Change
Occupancy	60.5%	60.1%	-0.6%
Room Rates	\$131.82	\$138.43	+5.0%
RevPAR	\$79.78	\$83.26	+4.4%
Room Nights	159,107	160,722	+1.0%

Vacation Rental Statistics ⁵	September 2024 ¹	September 2025	% Change
Occupancy	52.6%	51.5%	-2.0%
Room Rates	\$216.30	\$212.53	-1.7%
RevPAR	\$113.67	\$109.48	-3.7%
Room Nights	43,686	38,204	-12.5%
Unit Revenue (Nightly)	\$6,019,251	\$6,119,057	+1.7%

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

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

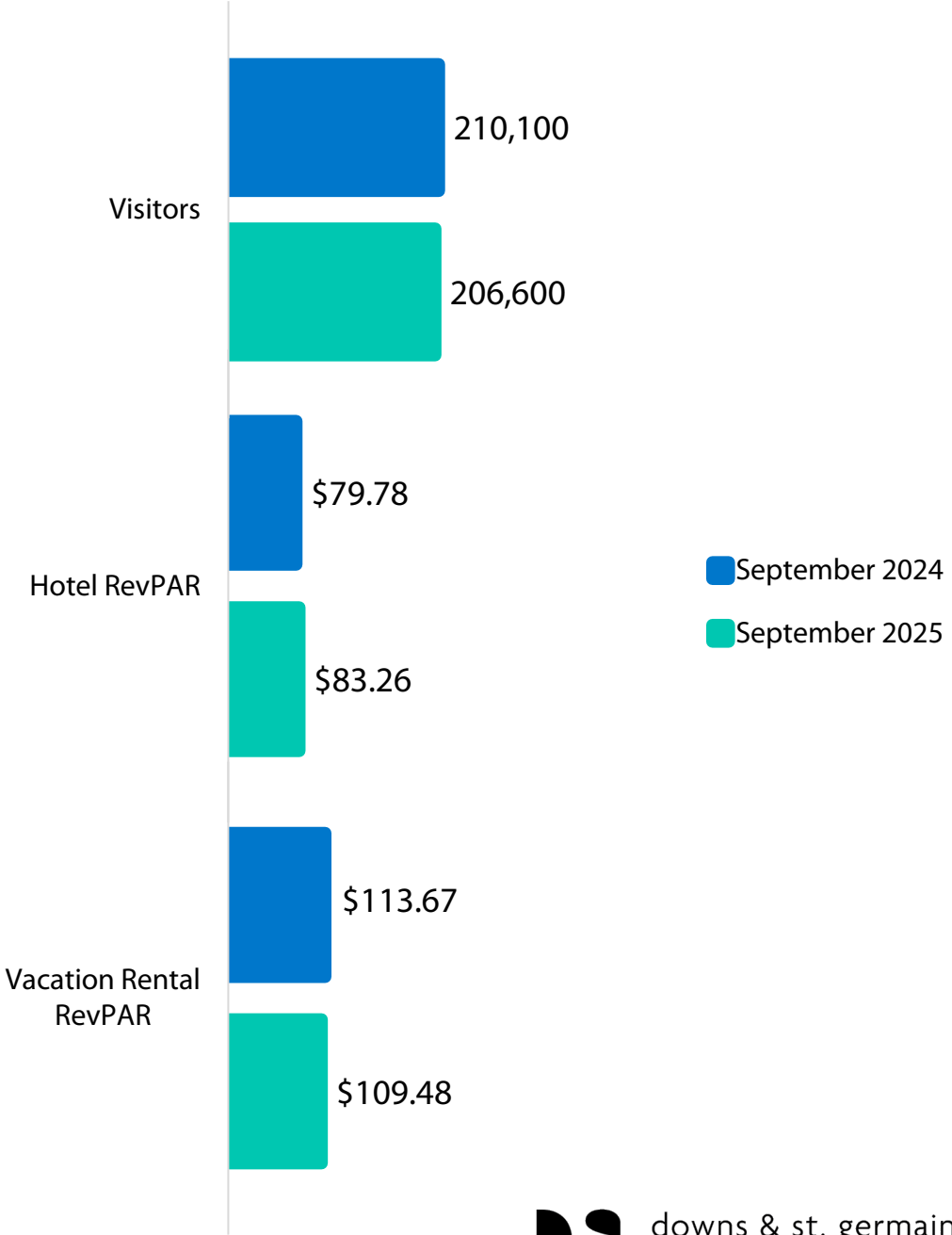
Adjustments may be made to these estimates at the end of the quarter, to account for quarterly fluctuations.

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 - SEP 2025)

Visitor Statistics	FYTD 2024	FYTD 2025	% Change
Visitors ²	2,564,000	2,492,400	-2.8%
Airline Passengers ³	3,030,411	3,114,429	+2.8%

Hotel Statistics ⁴	FYTD 2024 ¹	FYTD 2025	% Change
Occupancy	62.7%	62.6%	-
Room Rates	\$136.89	\$138.66	+1.3%
RevPAR	\$85.77	\$86.84	+1.2%
Room Nights	1,950,103	2,025,418	+3.9%

Vacation Rental Statistics ⁵	FYTD 2024 ¹	FYTD 2025	% Change
Occupancy	54.9%	54.4%	-0.9%
Room Rates	\$228.29	\$235.51	+3.2%
RevPAR	\$125.31	\$128.15	+2.3%
Room Nights	536,123	476,858	-11.1%
Unit Revenue (Nightly)	\$89,622,700	\$95,307,900	+6.3%

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

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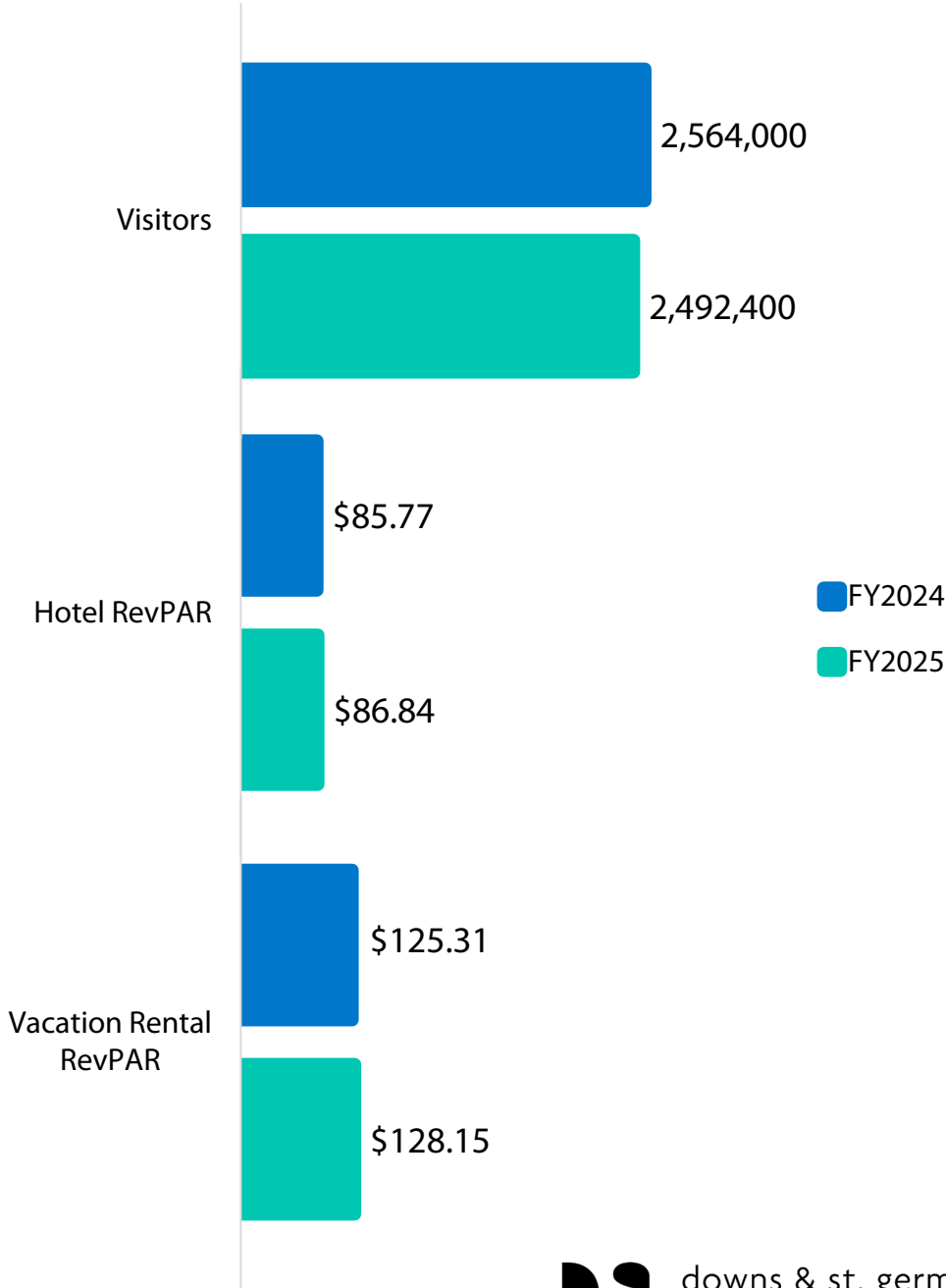
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PENSACOLA DASHBOARD – SEPTEMBER 2025

TOP VISITOR ORIGIN MARKETS		
Markets	September 2024	September 2025 ¹
Mobile ²	21%	20%
Atlanta	5%	5%
New Orleans	3%	4%
Birmingham	3%	4%
Nashville	3%	3%
Dallas – Fort Worth	2%	2%
Memphis	2%	2%
Montgomery – Selma	1%	2%

¹ Sources: Zartico and Visitor Tracking Study.

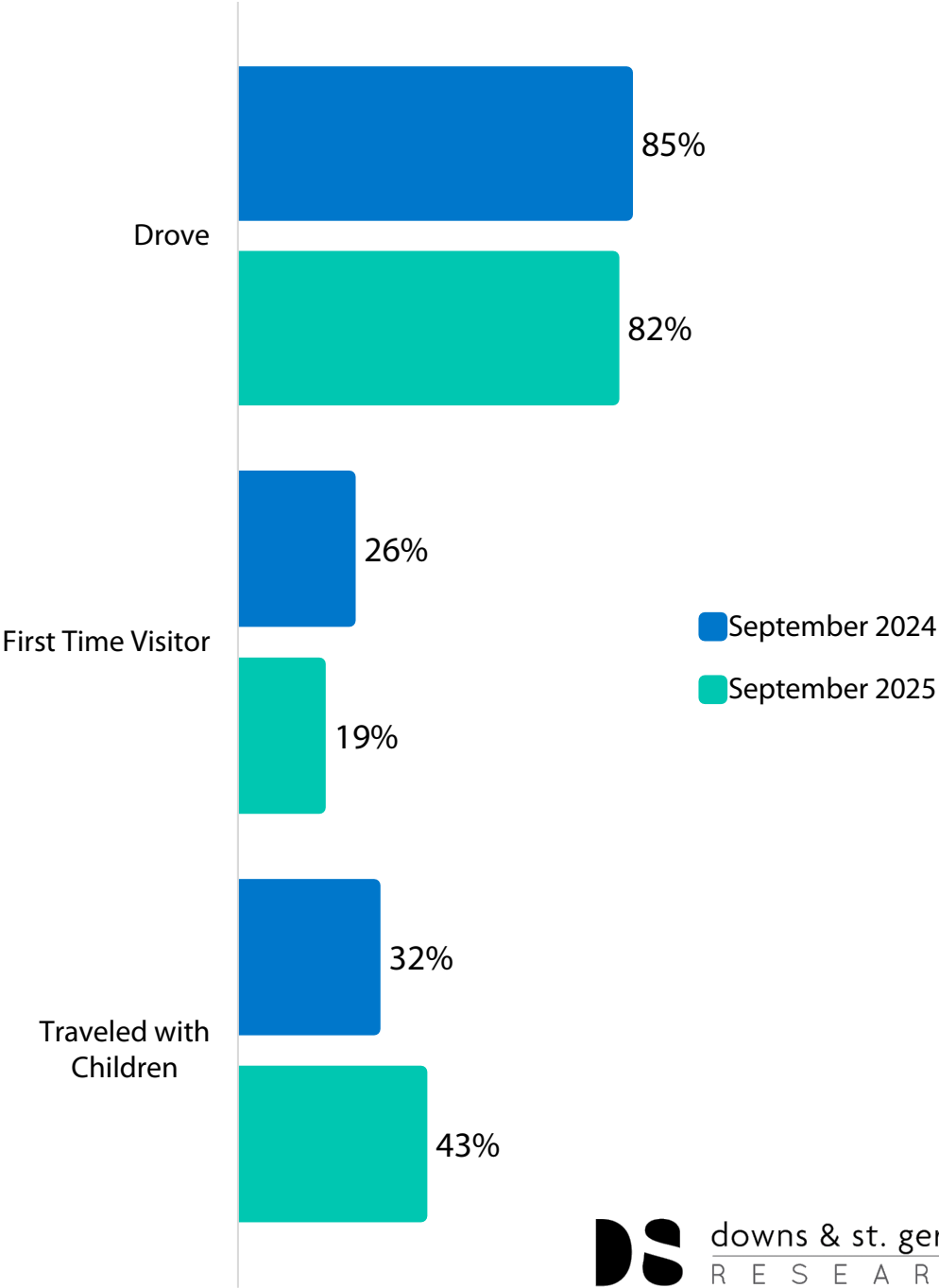
² Mobile DMA spans across Florida, Alabama, and Mississippi.

PENSACOLA DASHBOARD – SEPTEMBER 2025

September Visitors	2024	2025
Stayed in paid accommodations	62%	60%
Drove	85%	82%
Length of stay ¹	4.7	4.5
Will recommend	95%	97%
First time visitor	26%	19%

September Visitors	2024	2025
Median Age	45	46
Gender (Female) ²	60%	64%
Household Income	\$86,200	\$82,000
Travel party size ¹	3.0	2.8
Traveled with Children	32%	43%

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



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