

Monthly Stats (Duval County):

Monthly	Current Month	% of change	Year to Date	% of change
Occupancy	60.9%	-10.0%	66.7%	-3.1%
ADR	\$103.92	-3.7%	\$114.65	-0.2%
RevPAR	\$63.33	-13.3%	\$76.50	-3.3%
Room Revenue	\$39,131,646	-10.2%	\$546,081,746	-1.2%



EXECUTIVE SUMMARY:

Occupancy in Duval County closed December 2025 at 60.9%, reflecting a 10.0% year-over-year decline. Demand (rooms sold) decreased by a more moderate 6.8%, with the difference attributed to the nearly 700 new hotel rooms that entered the market since December 2024. While ADR and RevPAR experienced declines for the month, the additional room supply expanded the county's long-term capacity to accommodate future growth.

The Downtown submarket stood out as the strongest performer in December, delivering the only gains in both ADR and RevPAR among all submarkets. Downtown ADR increased by 3.3% and RevPAR grew by 2.4%, despite a slight 0.9% decline in occupancy.

For the year, Duval County finished 2025 with an average occupancy of 66.7%, representing a modest 3.1% decline from the prior year. Demand was down just 1.0%, while ADR remained nearly flat at \$114.65, a decrease of only \$0.23 year over year. RevPAR closed the year at \$76.50, and total room revenue reached \$546.1 million, a 1.2% decline from 2024. Importantly, the strong performance earlier in the year helped offset the softer results experienced during the fourth quarter. The fourth quarter was impacted by the Federal Government shutdown, which disrupted air travel, along with the implementation of tariffs and broader financial market uncertainty.

All submarkets recorded slight RevPAR declines for the full year. Downtown finished with a minimal 0.1% decline in room revenue, while the Westside saw a 0.5% decrease. The Southside submarket added 2.8% in new supply and limited its room revenue decline to just 0.9%, demonstrating healthy demand absorption amid expansion.

Large Groups &
Events 2018-2028

CoStar/STR
Methodology

Research &
Development



Duval County STR Report – December 2025

Monthly By Area

	<i>Occupancy</i>	<i>% of change</i>	<i>ADR</i>	<i>% of change</i>	<i>RevPAR</i>	<i>% of change</i>
Arlington	56.1%	-18.0%	\$78.92	-9.1%	\$44.29	-25.5%
Beaches	55.6%	-13.0%	\$151.79	-2.4%	\$84.40	-15.1%
Downtown	57.0%	-0.9%	\$138.08	3.3%	\$78.65	2.4%
Northside/Airport	59.8%	-11.7%	\$92.52	-8.9%	\$55.33	-19.5%
Southside/Mandarin	65.1%	-9.5%	\$97.22	-4.0%	\$63.27	-13.0%
Westside	57.5%	-12.8%	\$94.20	-7.0%	\$54.20	-18.8%

Year to Dates Stats by Areas

	<i>Occupancy</i>	<i>% of change</i>	<i>ADR</i>	<i>% of change</i>	<i>RevPAR</i>	<i>% of change</i>
Arlington	62.3%	-8.4%	\$81.85	-1.9%	\$51.03	-10.1%
Beaches	69.8%	-2.1%	\$184.35	0.9%	\$128.76	-1.3%
Downtown	64.8%	-0.3%	\$146.43	-0.8%	\$94.85	-1.1%
Northside/Airport	64.7%	-2.8%	\$97.89	-2.0%	\$63.32	-4.7%
Southside/Mandarin	68.8%	-4.1%	\$106.52	0.5%	\$73.29	-3.6%
Westside	65.5%	1.3%	\$98.92	-2.7%	\$64.81	-1.5%

Occupancy Segmentation

Segment	<i>Current Month</i>	<i>% of change</i>	<i>Year to Date</i>	<i>% of change</i>
Transient	52.4%	-7.9%	54.2%	-3.2%
Group	5.7%	-19.8%	9.4%	-1.3%
Contract	2.9%	-23.2%	3.1%	-8.1%
Total	60.9%	-10.0%	66.7%	-3.1%