Duval County STR Report – October 2025

Monthly Stats (Duval County):

Monthly	Current Month	% of change	Year to Date	% of change
Occupancy	63.9%	-9.8%	67.8%	-1.4%
ADR	$114.13	-1.1%	$116.19	0.7%
RevPAR	$72.95	-10.8%	$78.74	-0.8%
Room Revenue	$44,813,414	-8.0%	$466,432,286	1.2%

EXECUTIVE SUMMARY:

Year-to-date through October, Duval County's Room Revenue continues to outpace the same period in 2024, an encouraging milestone, especially following the conclusion of the longest federal government shutdown and ongoing economic uncertainty related to tariffs. While Occupancy shows a modest percentage decline, overall demand remains strong, with rooms sold increasing by 0.5%. The addition of approximately 600 new rooms since October 2024 has expanded available inventory and is contributing to the lower Occupancy percentage. Notably, the market has welcomed more than 7,000 additional rooms sold year-to-date, underscoring sustained interest in the destination.

October reflected declines across most STR performance metrics, with losses seen countywide. However, there were bright spots: Downtown and Beaches properties experienced growth in Average Daily Rate (ADR). Although all Occupancy segments experienced decreases for the month, Group business remains a key highlight, showing a 1.8% increase year-to-date compared to 2024.

Despite the challenges of the broader economic environment, the year-to-date performance reflects resilience and steady demand for travel to Duval County. The continued growth in rooms sold and strengthening ADR in key submarkets signal positive momentum as we move into the final months of the year.

Large Groups & Events 2018-2028

Jacksonville Forecast

Chart of Figures

CoStar/STR Methodology

Research & Development

Monthly By Area

	Occupancy	% of change	ADR	% of change	RevPAR	% of change
Arlington	58.0%	-13.9%	$77.87	-5.8%	$45.16	-18.9%
Beaches	63.8%	-8.4%	$176.89	2.6%	$112.83	-6.0%
Downtown	64.7%	-8.6%	$160.09	2.7%	$103.51	-6.1%
Northside/Airport	62.4%	-6.3%	$94.32	-7.4%	$58.87	-13.2%
Southside/Mandarin	66.4%	-9.6%	$105.01	-0.7%	$69.72	-13.2%
Westside	60.6%	-13.5%	$98.03	-6.6%	$59.39	-19.3%

Year to Dates Stats by Areas

By Area:	Occupancy	% of change	ADR	% of change	RevPAR	% of change
Arlington	63.6%	-6.0%	$82.44	-0.4%	$52.42	-6.4%
Beaches	72.7%	0.3%	$188.62	1.1%	$137.04	1.4%
Downtown	65.8%	0.5%	$147.18	0.3%	$96.87	0.8%
Northside/Airport	65.3%	-0.7%	$98.65	-0.8%	$64.45	-1.5%
Southside/Mandarin	69.6%	-2.7%	$107.91	1.4%	$75.08	-1.4%
Westside	66.8%	4.4%	$99.35	-2.1%	$66.38	2.2%

Occupancy Segmentation

Segment	Current Month	% of change	Year to Date	% of change
Transient	52.7%	-8.4%	54.6%	-1.8%
Group	8.2%	-16.3%	10.0%	1.8%
Contract	3.0%	-14.9%	3.2%	-5.4%
Total	63.9%	-9.8%	67.8%	-1.4%