

Weekly Stats (Duval County):

	Current Week	% of change	Month to Date	% of change
Occupancy	64.4%	-11.5%	62.3%	-12.8%
ADR	\$105.94	-4.4%	\$108.81	-6.5%
RevPAR	\$68.22	-15.4%	\$67.77	-18.5%
Room Revenue	\$9,521,591	*12.3%	\$40,538,086	-15.5%



The week of November 30 closed with an overall occupancy rate of 64.4% across Duval County. The Average Daily Rate (ADR) stood at \$105.94, while Revenue per Available Room (RevPAR) reached \$68.22, generating approximately \$9.5 million in room revenue. While these figures represent a decline compared to the same period in 2024, there were some bright spots worth noting.

Saturday night saw a notable uptick in demand, with room sales nearly matching 2024 levels. This surge was likely fueled by the Jaguars vs. Colts game on December 7 and seasonal holiday gatherings hosted at local hotels. Although all areas of the county experienced declines in key STR metrics, Downtown Jacksonville performed relatively well, selling just 0.2% fewer rooms than last year. Downtown ADR dipped by 2%, and RevPAR decreased by 2.3%, while the Beaches market posted a modest gain in ADR.

November's month-to-date performance reflects broader economic uncertainty, tariff impacts, the federal government shutdown, and additional hotel supply introduced since November 2024. The presence of two weekday holidays also contributed to softer demand patterns. These factors underscore the complexity of the current operating environment for hospitality businesses in the region.

According to a recent CoStar Analytics article by Chantal Wu, Jacksonville's hotel market remains active with a robust construction pipeline. Over 1,000 new rooms have opened year-to-date, with another 140 rooms expected before year-end. As the market absorbs this influx of supply, Jacksonville is projected to experience consecutive 12-month occupancy declines through 2026. While this presents challenges, it also signals long-term confidence in the region's growth potential.

Weekly By Area

Source: STR

	Occupancy	% of change	ADR	% of change	RevPAR	% of change
Arlington	57.9%	-19.9%	\$76.82	-10.4%	\$44.50	-28.3%
Beaches	54.2%	-21.4%	\$153.66	1.8%	\$83.26	-20.0%
Downtown	62.5%	-0.3%	\$134.78	-2.0%	\$84.20	-2.3%
Northside/Airport	63.9%	-13.5%	\$92.76	-8.1%	\$59.29	-20.5%
Southside/Mandarin	69.7%	-10.0%	\$102.81	-4.2%	\$71.70	-13.8%
Westside	60.1%	-13.1%	\$93.22	-8.7%	\$56.01	-20.6%

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