



ROCKPORT  
ANALYTICS

**FLORIDA KEYS VISITOR PROFILE STUDY**  
2025 ANNUAL RESULTS  
MARCH 2026

The  
Florida Keys  
& Key West  
... come as you are®

# Study Overview & Methodology

The mission of the Monroe County Tourist Development Council (TDC) is to manage Monroe County’s tourism marketing efforts to assure long-term economic stability resulting from visitor-related revenues. The TDC pledges to benefit residents and visitors by utilizing those financial contributions to improve Florida Keys environmental and community resources. The tourism council also prioritizes working to enhance residents' quality of life and minimize their property taxes through safeguarding the health of the county’s primary industry.

The TDC has commissioned Rockport Analytics to conduct an ongoing Visitor Profile Survey (VPS) – a study that has been conducted since 1996 – to develop a profile of overnight visitors, by season and district of the Florida Keys. Visitors are profiled in terms of demographics, psychographics, tripographics and type of visitor. These metrics are tracked quarter-by-quarter. The strategic implications of this information are used to direct the marketing, advertising and sales efforts of the TDC.

The study is being fielded through a combination of in-person intercept surveys and online surveys of recent visitors. A minimum of 600 surveys are collected per quarter. Post-stratification weights, based on district and month of the year, have been applied to the data to ensure they are projectable to the visitor population at large. Cruise ship visitors, day visitors, and those traveling only for business are not included in the scope of this study. This report summarizes the annual results from visitation to all five districts of the Florida Keys.

## Responses Collected: 2025 (n=3,745 Total)

Month	Key West	Big Key Pine	Marathon	Islamorada	Key Largo	Florida Keys Total
January	107	58	67	42	55	329
February	84	44	31	95	52	306
March	130	53	64	16	50	313
April	99	46	49	56	52	302
May	113	59	53	20	51	296
June	108	64	53	39	41	305
July	132	34	41	47	67	321
August	143	80	48	19	10	300
September	75	49	54	84	94	356
October	107	55	45	37	41	285
November	139	53	45	35	59	331
December	113	40	58	33	57	301

# 2025 FL Keys Visitor Highlights

## Visitor profile and trip behavior

- Domestic travelers accounted for 82% of all visitors, with 19% of these traveling from within the state of Florida. Canadians represented 3.4% of Florida Keys Region visitors, and all other countries combined amounted to 15.1% of the total.
- The average age of visitors was 51 years old; 40% of visitors were millennials. Sixty-seven percent of Florida Keys visitors were non-Hispanic white. Household incomes of visitors averaged \$118,317.
- The average length of stay in the Florida Keys was 4.2 nights. Fifty-one percent stayed 4-7 nights, 46% stayed 1-3 nights, and 3% stayed 8 or more nights.
- A little over half (54%) of Florida Keys visitors planned their trip at least one month in advance.
- Sixty-four percent of visitors stayed in a hotel, and 41% of Florida Keys visitors made a reservation online through a travel site (e.g., Travelocity, Expedia). Thirty-nine percent drove a personal vehicle or RV, while 26% flew into Miami and drove a rental car to the Keys.
- The most common primary trip purpose (75%) was a recreation or vacation trip, with 48% indicating that the one experience that best describes why they chose the Keys was to relax and escape.

## Spend, satisfaction, and marketing outcomes

- Florida Keys visitors spent an average of \$1,112 per person per trip. Lodging accounted for 47% of spending (\$524), food and beverage (32%) amounted to \$358, transportation (6%) at \$69, water recreation (6%) at \$63, land recreation (5%) at \$57, and retail (4%) at \$41.
- Nearly all (98%) of Florida Keys visitors were satisfied (4/5) or very satisfied (5/5) with their trip to the Keys.
- Fifty-two percent of Florida Keys visitors had visited the Keys another time within the past three years.
- Almost 40% of visitors had seen or heard advertising for the Florida Keys in the past three months.

# 2025 Year-Over-Year Trends

**2025 brought four meaningful shifts in motivations and behavior:**

## Slightly Younger, Wealthier, More Diverse

Avg. Age: 52

Average visitor age fell from 43 to 42. Millennials gained share, Gen X declined, and visitation became more racially diverse. Household income also increased to roughly \$118k.

## International Mix Was Stable, but U.S. Origins Shifted

International visitation: +0.4 pts

International visitation increased only marginally. However, the origin of U.S. travelers shifted, with more visitors coming from Texas, Delaware, and Alaska, while visitation from several Midwestern states, including Ohio, Minnesota, and Wisconsin, declined slightly.

## Party Size Held Steady, but Multigenerational Travel Rose

Multigenerational travel: +3.2 pts

Average travel party size remained largely unchanged year over year. Most parties traveled without children under 17, while multigenerational travel increased modestly, with more visitors reporting trips that included parents or grandparents.

## Shorter Trips Reduced Spend

Avg. stay: 4.2 nights | Spend per person: -19%

The average length of stay declined from 5.6 nights in 2024 to 4.2 nights in 2025, with the largest drop occurring in Key West. As a result, total visitor spending per person declined roughly 19 percent, largely driven by reduced lodging expenditures associated with shorter trips.

# 2025 Year-Over-Year Trends

**2025 brought four meaningful shifts in motivations and behavior:**

## Motivations Became More Social and Experience-Oriented

Friends/family influence: +9.5 pts

More visitors cited nightlife and conventions as reasons for visiting the Keys, while fewer reported coming primarily for recreation, vacation, or a better climate. At the same time, recommendations from friends and family and online reviews or blogs became significantly stronger drivers of visitation.

## Core Activities Held Steady, but Dining and Nightlife Softened

Dining: -6.3 pts | Bar attendance: -5.4 pts

Dining out, beach activities, and sightseeing remained the most common visitor activities. However, participation in dining and bar attendance declined, while snorkeling and museum visits saw modest increases.

## Planning Windows Shortened and Deal-Seeking Behavior Declined

2-4 weeks out: 33%

More visitors cited nightlife and conventions as reasons for visiting the Keys, while fewer reported coming primarily for recreation, vacation, or a better climate. At the same time, recommendations from friends and family and online reviews or blogs became significantly stronger drivers of visitation.

## Satisfaction Stayed Strong Despite Behavioral Shifts

Satisfaction: 4.8 / 5

Overall satisfaction with the Florida Keys remained strong in 2025, with average satisfaction holding steady and most visitors reporting they were very satisfied with their trip. Likelihood to recommend the destination also remained high, with only a slight year-over-year decline.

# Strategic Implications



## Shorter Trips, Higher Intent

Travelers are planning faster and staying fewer nights, signaling more intentional trip behavior.



## Repeat Visits Are the Opportunity

Satisfaction is high, but repeat visitation softened, creating a retention opportunity.



## The Keys Are Part of a Bigger Florida Journey

Many visitors are pairing the Keys with other Florida stops. The Keys are a leg on the journey.



## Trust Drives Choice

Word of mouth and reviews matter more in decision-making.



## Experience Value Beats Price Value

Visitors are less focused on deals and more focused on meaningful time well spent.

# Strategic Recommendations



## Expand and Promote Experience Diversity Across the Keys

Continue to develop and market a broader mix of cultural, recreational, and experiential offerings—including museums, historical sites, dining, and water-based activities—to support more engaging and differentiated visitor experiences.



## Align Marketing with Shorter, High-Impact Trip Patterns

Position the Florida Keys as an ideal 3–4 night getaway, supported by curated itineraries and easy-to-plan experiences, while encouraging longer stays through multi-day and cross-Key itineraries.



## Strengthen Repeat Visitation Through Targeted Engagement

Implement post-visit marketing and remarketing strategies that encourage first-time visitors to return, highlighting new experiences across different Keys communities.



## Leverage Gateway and Multi-Destination Travel Opportunities

Partner with key Florida gateway markets (e.g., Miami, Fort Lauderdale, Orlando) to position the Keys as a natural extension within broader Florida travel itineraries.



## Enhance Digital Presence and Social Proof

Strengthen online reviews, user-generated content, and digital storytelling, with increased visibility closer to booking windows to capture shorter-lead and spontaneous travel.

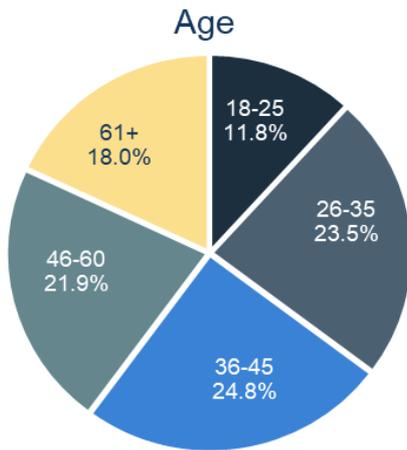


## Focus on Value-Added Packaging Rather Than Discounting

Develop bundled experiences, curated itineraries, and value-added offers that enhance perceived value without relying heavily on price-based promotions.

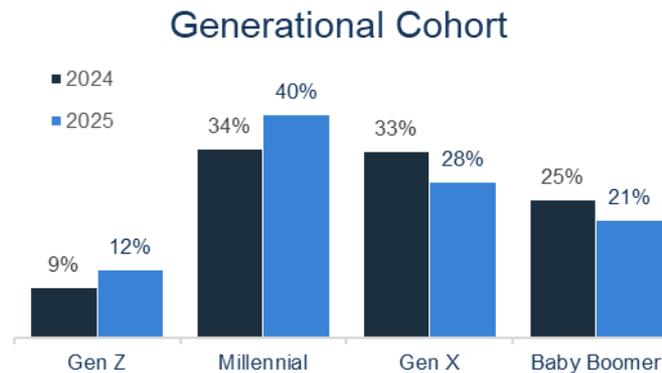
# Visitor Demographics: Age, Generational Cohort, and Gender

- The average age of Florida Keys visitors decreased a year since last year. Almost a quarter (24.8%) of 2025 travelers were in the 36-45 age group. Over one-fifth (23%) were ages 26-35, as well as 46-60 years old (22%). Just under 12% were between the ages of 18 and 25.
- Two-fifths of travelers were millennials (age 29-44), which is six percentage points higher than the previous year. Over a quarter (28%) of 2025 travelers were Gen X (age 45-60), which is a five point decrease relative to last year.
- The gender mix of Florida Keys visitors shifted nearly seven points this year. Male travelers now make up 55% of the total, while females account for 45%, reversing the female majority seen in 2024.

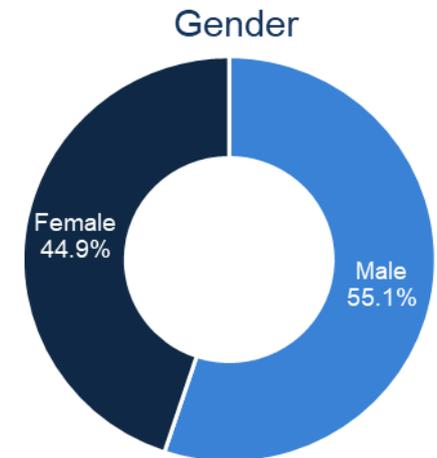


**Average Age**  
2024: 43 years old  
**2025: 42 years old**

Q: What is your age?



Q: What is your age?



Gender	2024	2025	% +/-
Male	48.3%	55.1%	6.8%
Female	51.6%	44.9%	-6.7%

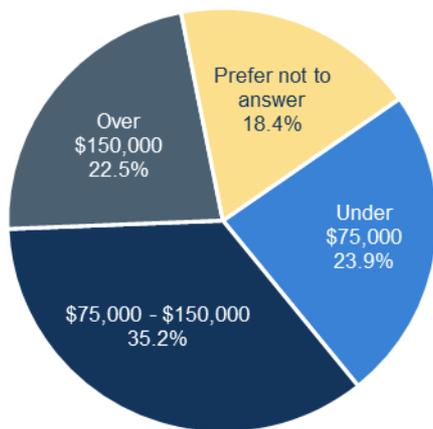
Q: What is your gender?

# Visitor Demographics: Income, Ethnicity and Sexual Orientation

Florida Keys VPS  
Keys-Wide  
Results  
2025

- Average household income was \$118,317, up about \$9k from 2024. About 24% of visitors earned under \$75k, 35% earned \$75k–\$150k, and 23% earned over \$150k. Another 18% did not report income.
- In 2025, 67% of visitors were non-Hispanic White, down nine points. African American visitors rose to 18%, Hispanic/Spanish/Latino visitors were 14%, Asian or Pacific Islanders were 3%, and 1% identified as American Indian/Alaska Native or “other.”
- Over 89% of visitors identified as straight/heterosexual. Bisexual visitors accounted for just over 6%, gay visitors for over 2%, and lesbians for just over 1%. About 1% did not answer.

### Household Income

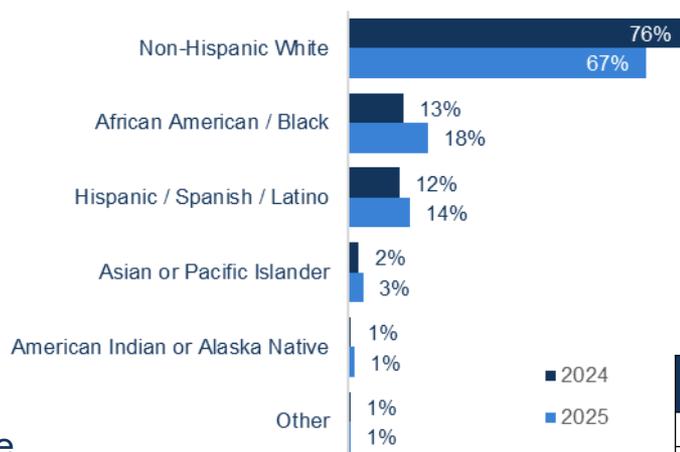


### Average Household Income

2024: \$109,318  
2025: **\$118,317**

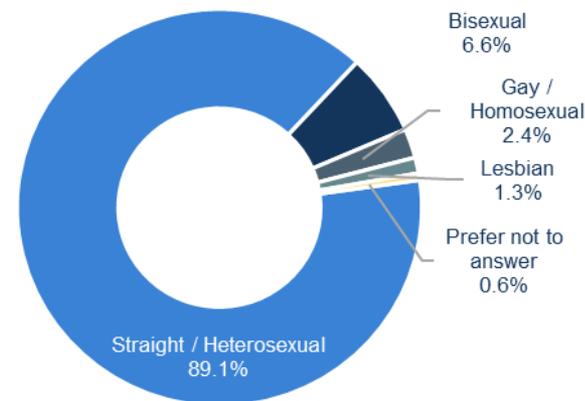
Q: What is the total annual income of your household?

### Ethnicity



Q: Do you consider yourself to be: (Select all that apply)

### Sexual Orientation

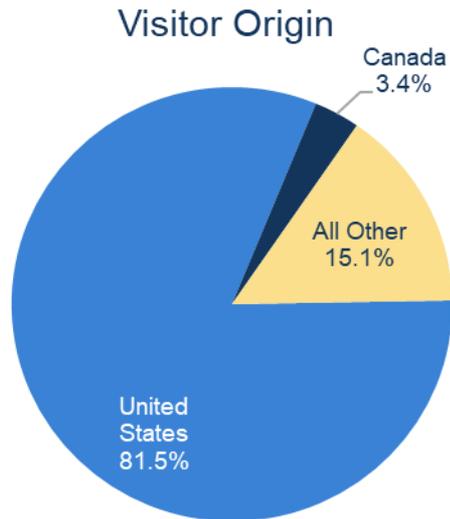


Sexual Orientation	2024	2025	% +/-
Straight / Heterosexual	92.1%	89.1%	-3.0%
Bisexual	3.0%	6.6%	3.6%
Gay / Homosexual	2.7%	2.4%	-0.3%
Lesbian	1.3%	1.3%	0.0%
Prefer not to answer	0.8%	0.6%	-0.2%

Q: Orientation?

# Origin of Florida Keys Visitors

- Most Florida Keys visitors in 2025 were from the United States (81.5%). Canadian travelers accounted for 3.4% of visitors, while over 15% of the visitors also came from South America, Europe, and Asian countries. International travel climbed 0.4 points from 2024 levels, with more visitors from countries such as France, Germany, and Brazil
- Of the visitors from the U.S., almost 19% came from within Florida, a drop of 0.4 percentage points from 2024. New York attracted over 8% of 2025, while Texas, California, and Georgia each attracted over 6%. Over 3% of visitors were from Illinois, North Carolina, Pennsylvania, and Michigan, while just under 3% were from Ohio.



Country of Origin	2024	2025	% +/-
United States	81.9%	81.5%	-0.4%
Canada	3.1%	3.4%	0.3%
All Other	15.0%	15.1%	0.1%

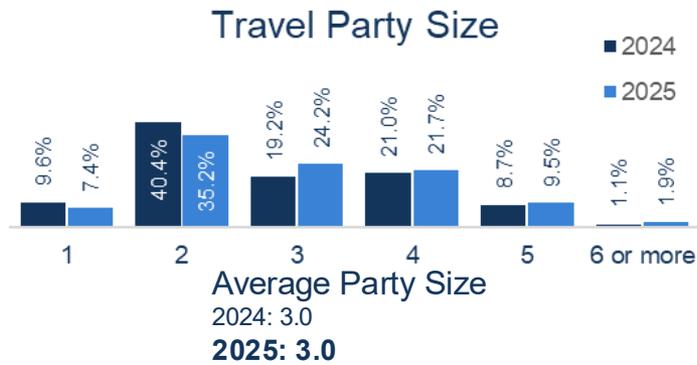
Q: What country do you currently live in?  
Percentages are based on intercept survey collections

State of Origin	Percent	
	2024	2025
Florida	19.3%	18.9%
New York	7.7%	8.3%
Texas	5.2%	7.6%
California	6.2%	6.7%
Georgia	5.7%	6.6%
Illinois	4.1%	3.7%
North Carolina	3.3%	3.6%
Pennsylvania	3.6%	3.5%
Michigan	3.5%	3.4%
Ohio	4.3%	2.9%

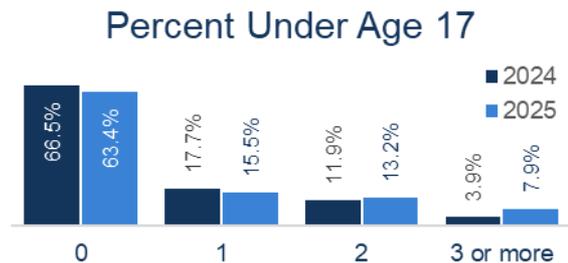
Q: Where in the U.S. do you live?  
All other states were <3.0% each

# Travel Party Size and Travel Companions

- Average party size held at 3. Pairs made up over 35% of groups (down 5 points). Groups of 3 accounted for 24%, groups of 4 for 22%, and solo travelers for 7%. Parties of 5 represented over 9%, and groups of six or more were just under 2%.
- Sixty-three percent of parties traveled without children under 17. About 15% traveled with one child, 13% with two, and 8% with three or more (up four points).
- Seventy percent traveled with a spouse or partner. Thirty-five percent traveled with children or step-children, and just over 21% traveled with friends.

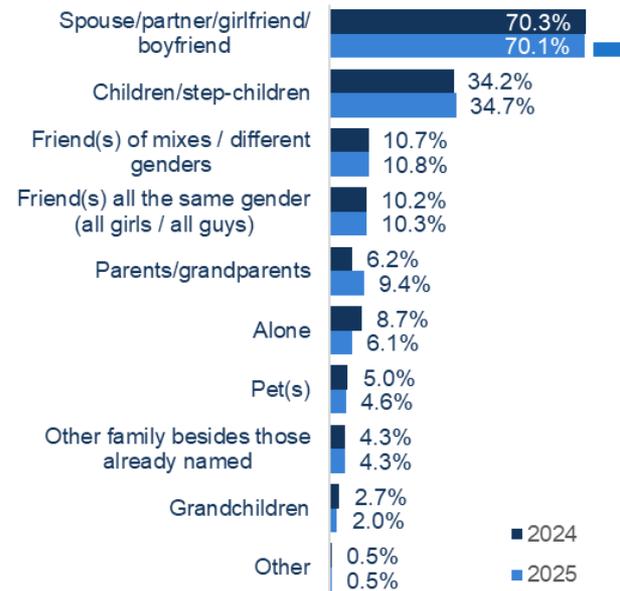


Q: Including yourself, how many people are in your travel party?



Q: How many in your travel party are under the age of 17?

### Travel Companions



41.8% were traveling as a party of 2 in 2025, compared to 48.3% in 2024

Q: Which best describes who you are traveling with? (Select all that apply)

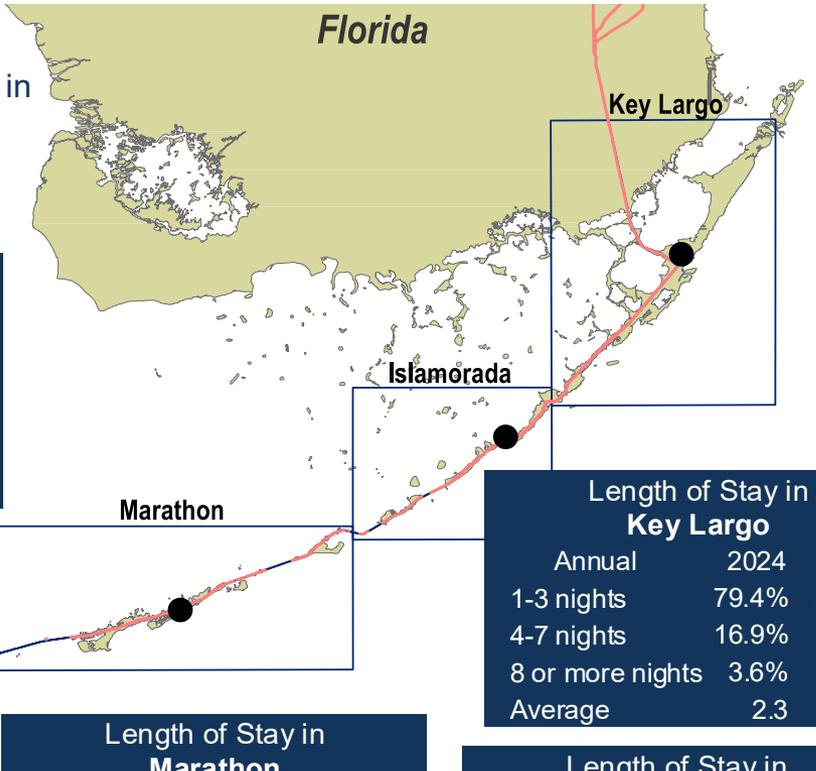
# Visitors' Length of Stay in the Florida Keys

- The average length of stay in 2025 for all the Florida Keys was 4.2 nights, which is 1.4 nights shorter than the average stay of 2024. Over half of respondents (51%) stayed in the Keys between four and seven nights, and 3% stayed 8 or more nights.
- Visitor stays averaged 2.7 nights in Key West (2.2 nights less than the previous year), 2.9 nights in Marathon, and 2.5 nights in the Lower Keys. Stays in Islamorada averaged 2.3, and Key Largo averaged 2.0 nights.

	Annual	2024	2025
1-3 nights	40.9%	45.9%	45.9%
4-7 nights	51.0%	51.2%	51.2%
8 or more nights	8.1%	2.9%	2.9%
Average		5.6	4.2

	Annual	2024	2025
1-3 nights	84.3%	86.9%	86.9%
4-7 nights	12.8%	10.6%	10.6%
8 or more nights	2.9%	2.5%	2.5%
Average		2.5	2.5

	Annual	2024	2025
1-3 nights	68.2%	75.3%	75.3%
4-7 nights	26.0%	23.9%	23.9%
8 or more nights	5.7%	0.8%	0.8%
Average		4.9	2.7



	Annual	2024	2025
1-3 nights	79.4%	89.3%	89.3%
4-7 nights	16.9%	9.8%	9.8%
8 or more nights	3.6%	0.9%	0.9%
Average		2.3	2.0

	Annual	2024	2025
1-3 nights	72.0%	76.1%	76.1%
4-7 nights	24.0%	21.7%	21.7%
8 or more nights	4.1%	2.1%	2.1%
Average		3.9	2.9

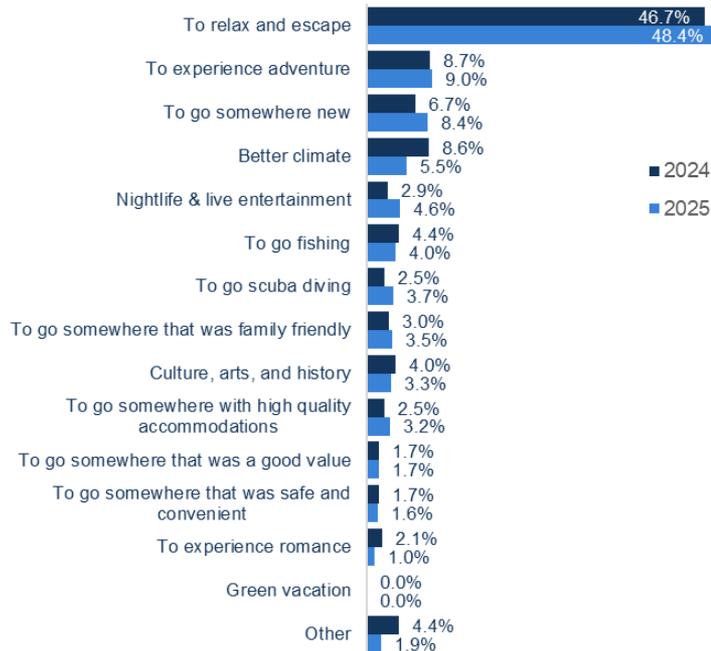
	Annual	2024	2025
1-3 nights	82.5%	89.3%	89.3%
4-7 nights	12.9%	9.2%	9.2%
8 or more nights	4.6%	1.6%	1.6%
Average		2.5	2.3

Q: How many nights will you stay in each of the Florida Keys?

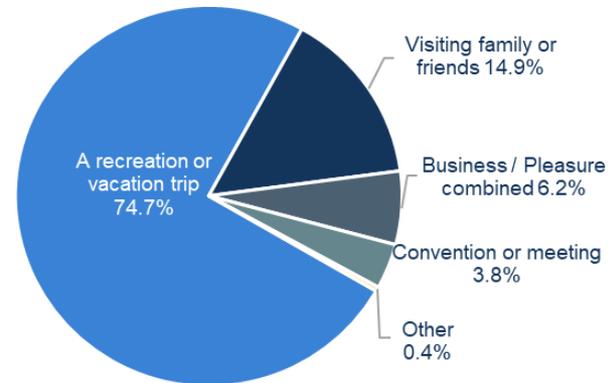
# Primary Reasons and Experiences That Drive Visitors to the Keys

- 48% of 2025 Florida Keys visitors traveled to the Keys primarily to relax and escape, an increase of 1.3 percentage points compared to last year. Experiencing adventure remained the second most popular reason (9%), while nightlife and live entertainment had the largest increase (1.7 percentage points) from 2024 to 2025.
- When asked about the primary purpose for the visit to the Keys, 75% of visitors indicated it was a recreation or vacation trip; a 2.3 percentage point decrease from last year. Fifteen percent indicated that it was to visit family or friends. Six percent were combining a business and leisure trip, 4% came for a convention or meeting, and 0.4% for other purposes.

One Experience Which Best Describes Why Florida Keys



Primary Purpose of Visit to the Keys



Primary Purpose of Visit	2024	2025	% +/-
A recreation or vacation trip	77.0%	74.7%	-2.3%
Visiting family or friends	14.6%	14.9%	0.3%
Business / Pleasure combined	6.8%	6.2%	-0.6%
Convention or meeting	1.0%	3.8%	2.8%
Other	0.6%	0.4%	-0.2%

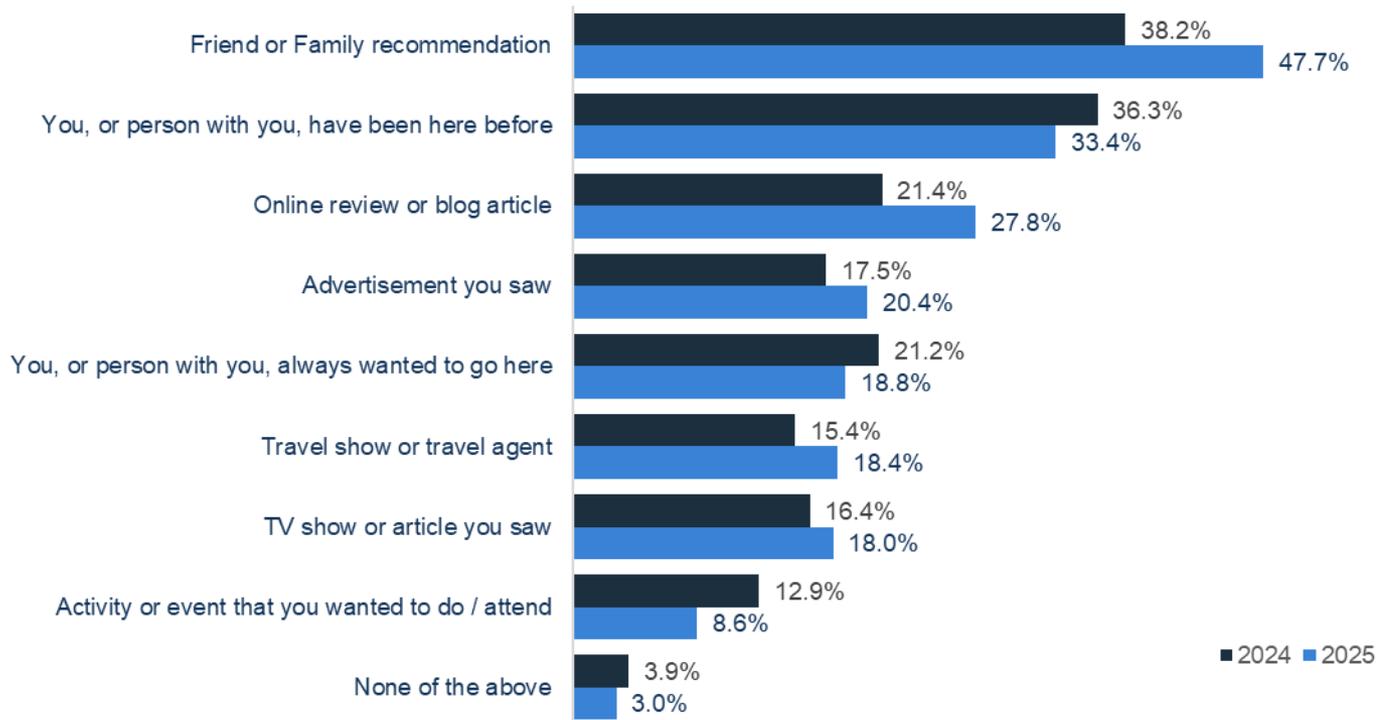
Q: What was the primary purpose of your visit to the Keys?

Q: Which ONE of your experiences BEST describes why you decided to visit the Florida Keys?

# Key Influencers for Visits to the Florida Keys in 2025

- Friend or family recommendation remained the top influencer in 2025 at 48%, rising nine points and showing the largest gain among all factors. Online reviews increased six points year over year, and travel shows and advertisements each rose three points. Activities the visitor wanted to do declined the most, dropping four points, and repeat visits decreased three points.

Key Influencer in Visiting the Florida Keys

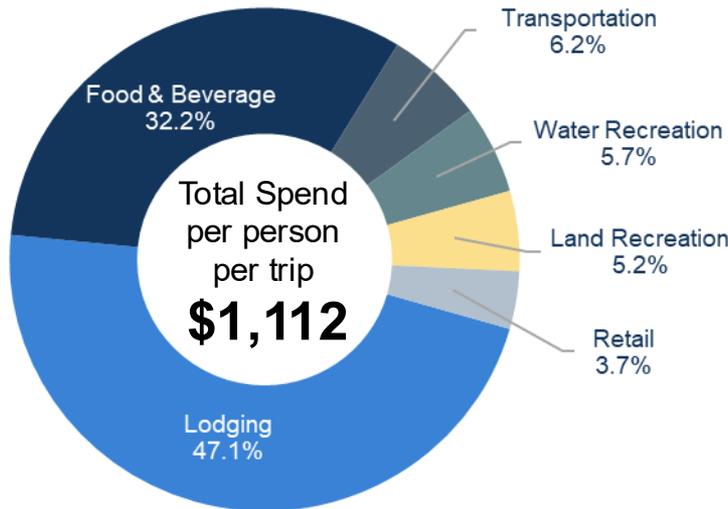


Q: Which of the following influenced you to first think Florida Keys? (Select all that apply)

# Florida Keys Visitor Spending

- 2025 visitor spending averaged \$1,112 per person per trip, down from \$1,376 in 2024. This decrease was mainly driven by a decrease in lodging spend because of the shorter length of stay across the Keys (5.6 to 4.2).
- Lodging comprised almost 47% of visitor spending in 2025, with an average of \$524 per person per trip—down from \$787 in 2024. Average reported spending also decreased for all other categories as well, with a decrease of almost \$200 in average food and beverage spend.

Average Spent Per Person Per Trip



Spending Category	Average per person per trip		
	2024	2025	\$ +/-
Lodging	\$787	\$524	-\$263
Food & Beverage	\$552	\$358	-\$194
Transportation	\$125	\$69	-\$56
Water Recreation	\$93	\$63	-\$30
Land Recreation	\$60	\$57	-\$3
Retail	\$50	\$41	-\$9
<b>Total</b>	<b>\$1,376</b>	<b>\$1,112</b>	<b>-\$264</b>

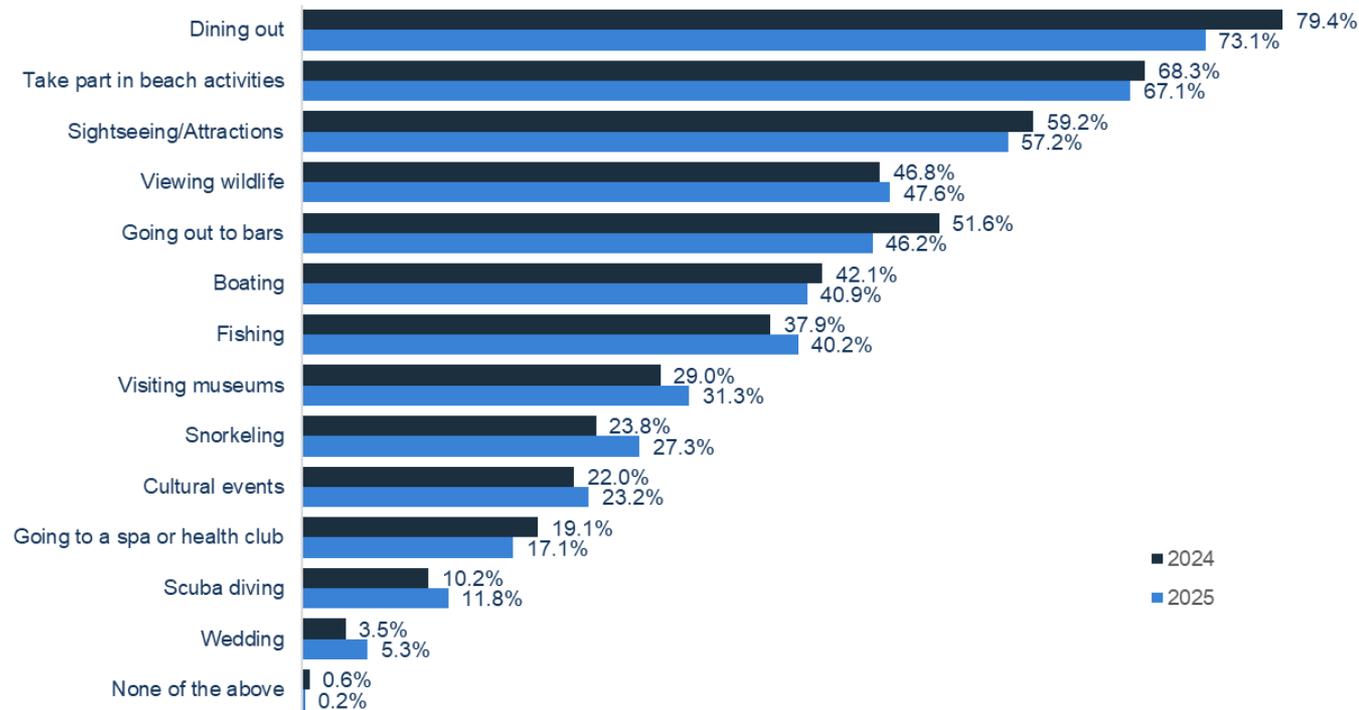
Q: Thinking only about the part of your trip that will be in the Florida Keys / Florida Keys Region, how much do you estimate your party will have spent on each of the following during your stay in the Florida Keys / Florida Keys Region?

# Activity Participation Among Florida Keys Visitors

Florida Keys VPS  
Keys-Wide  
Results  
2025

- Seventy-three percent of 2025 Florida Keys visitors dined out during their trip, and 67% participated in beach activities. Fifty-seven percent went sightseeing or visited attractions, a two-point decline from 2024. Snorkeling saw the largest increase at 3.5 points, while dining out saw the largest decrease at six points.

Activities That Travel Party Members Participated In

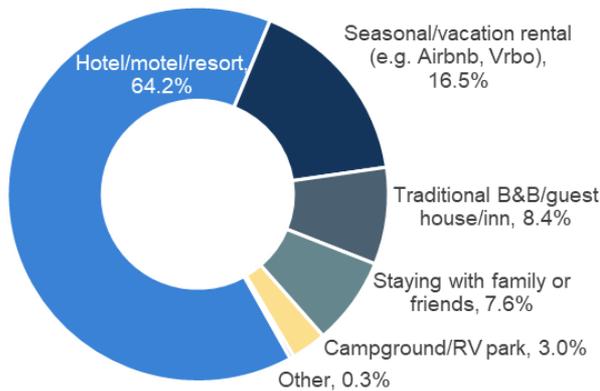


Q: While visiting the Florida Keys or Florida Keys Region, have you or anyone from your group gone: (Select all that apply)

# Visitor Accommodations and Reservations

- Most Florida Keys visitors (64%) stayed in a hotel, motel, or resort in 2025—an increase of 2 points year-over-year. Seasonal/vacation rentals accounted for almost 17% of stays, while staying in a traditional bed and breakfast made up over 8% of accommodations. Over seven percent stayed with family or friends. Campgrounds/RV parks drew 3% of visitors. Less than one percent indicated another type of accommodation not listed.
- In 2025, 41% percent made their reservation online through a travel site (Expedia, Travelocity, etc.), decreasing over 6 points. Visitors were more likely to use a travel agent in 2025, as well as making a direct call to the property in order to make their reservations.

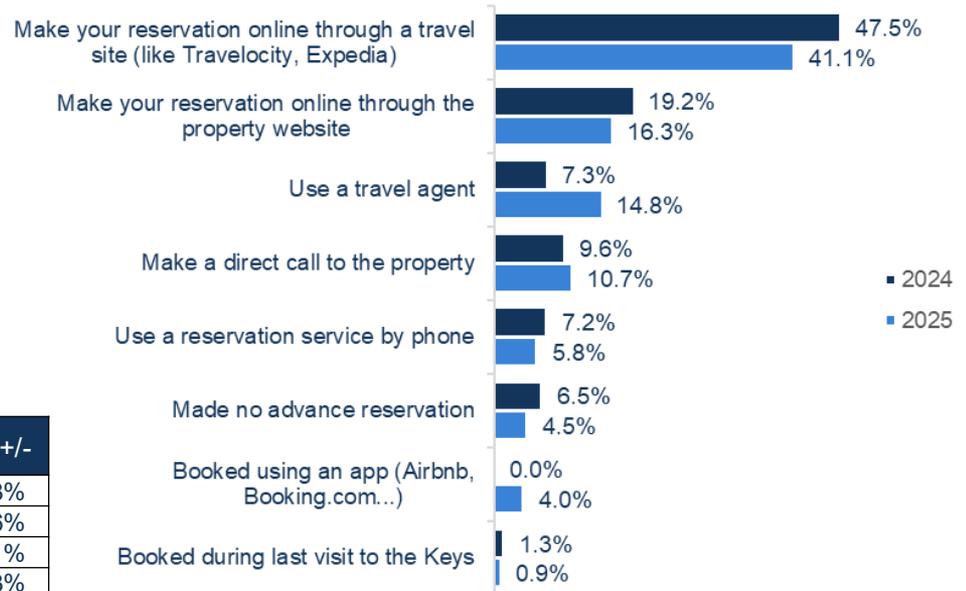
Primary Accommodations in the Keys



Accommodations During Visit	2024	2025	% +/-
Hotel/motel/resort	61.9%	64.2%	2.3%
Seasonal/vacation rental (e.g. Airbnb, Vrbo)	15.9%	16.5%	0.6%
Traditional B&B/guest house/inn	9.5%	8.4%	-1.1%
Staying with family or friends	7.3%	7.6%	0.3%
Campground/RV park	4.6%	3.0%	-1.6%
Other	0.8%	0.3%	-0.5%

Q: Which of the following best describes your accommodations while staying in the Florida Keys?

Method of Accommodation Reservation



Booked Using an App was first introduced as an answer choice in 2025 Q4

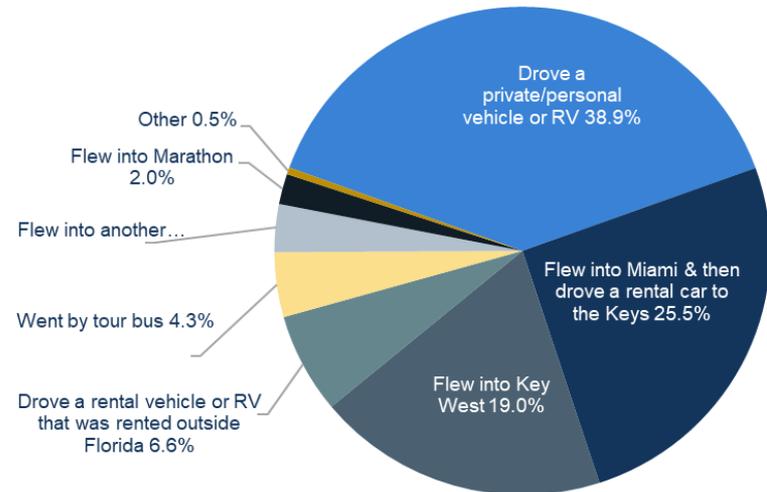
Q: When making your reservations for your accommodations, did you...

# Visitor Transportation to the Keys

- In 2025, almost half (49.7%) of the people visiting the Keys flew into Florida. Of those, 26% flew into Miami, 20% flew into Key West, 4% flew into another Florida airport, and 3% flew into Marathon.
- 2025 visitors were 4 percentage points more likely to drive a personal vehicle or RV, while being 2 points less likely to drive a rental vehicle or RV that was rented outside of Florida.

Primary Mode of Transportation	2024	2025	% +/-
Drove a private/personal vehicle or RV	34.9%	38.9%	4.0%
Flew into Miami & then drove a rental car to the Keys	25.9%	25.5%	-0.4%
Flew into Key West	20.1%	19.0%	-1.1%
Drove a rental vehicle or RV that was rented outside Florida	8.6%	6.6%	-2.0%
Flew into another Florida airport & then drove a rental car to the Keys	4.3%	4.3%	0.0%
Went by tour bus	2.9%	3.2%	0.3%
Flew into Marathon	2.6%	2.0%	-0.6%
Other	0.8%	0.5%	-0.3%

Primary Mode of Transportation to the Keys

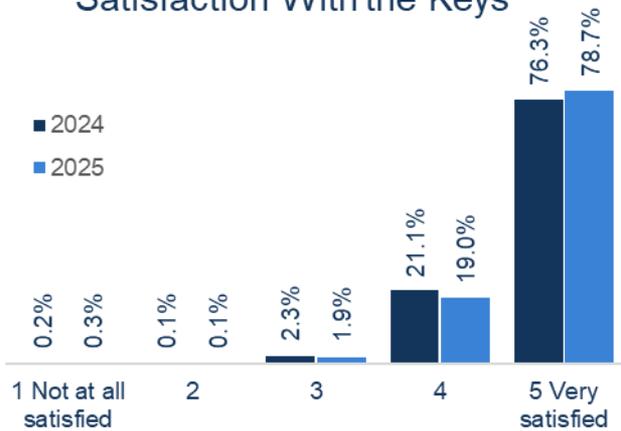


Q: How did you get to the Florida Keys on your trip?

# Satisfaction With the Keys and Recommendations to Visit the Keys

- The 2025 average visitor satisfaction rating of the Florida Keys remained at a 4.8 out of 5. Nineteen percent of visitors were satisfied with the Keys (4/5), and 78.7% were very satisfied (5/5)—a 2.4 point increase. Less than 2% were neutral regarding their satisfaction (3), while less than 1% claimed to be ‘not satisfied’ or ‘not at all satisfied’ with their trip.
- The average rating of those who would recommend the Florida Keys to a friend or family member was 9.2 out of 10. Over 76% percent of visitors were promoters, ranking the Keys as 9 or 10. Four and a half percent were detractors, ranking the Florida Keys between 1 and 6. The net promoter score (promoters minus detractors) was 72, which is 0.4 points higher than 2024 NPS ratings.

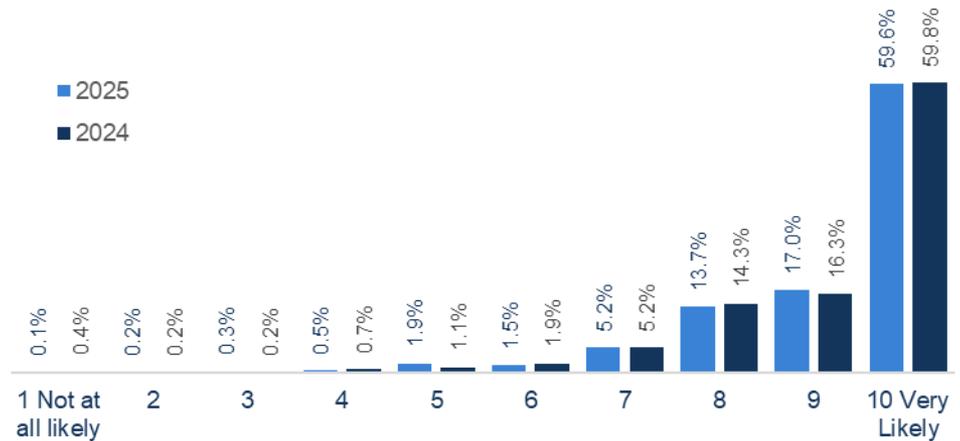
Satisfaction With the Keys



**Average Satisfaction**  
2024: 4.8  
**2025: 4.8**

Q: On a scale of 1-5, where 1 is “Not at all satisfied” and 5 is “Very Satisfied”, how satisfied were you with your most recent visit to the Keys?

Likeliness to Recommend the Keys



**Average Likeliness to Recommend**  
2024: 9.3  
**2025: 9.2**

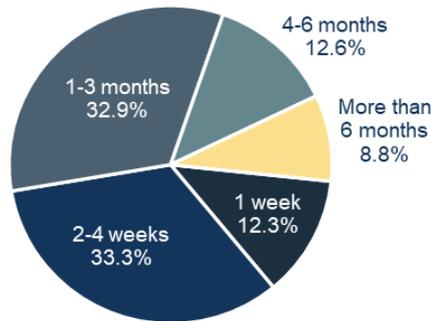
**NPS**  
2024: 71.6  
**2025: 72.0**

Q: On a scale of 1-10, where 1 is “Not at all Likely” and 10 is “Very Likely”, how likely are you to recommend to a friend or family member that they visit the Florida Keys?

# Trip Planning

- Around one-third (33.3%) of 2025 Florida Keys visitors made their decision to visit the Keys 2-4 weeks in advance of their trip, which is over 7 points higher than 2024. Longer-term planners (more than 6 months) decreased 6 percentage points from last year.
- Over half (57.3%) looked for a special deal when planning or booking their vacation, which is a decrease of 9 percentage points since 2024.
- 2025 visitors were more likely to use a social site, and traveler online review sites compared to the previous year—increasing 6.4 and 5.7 points, respectively.

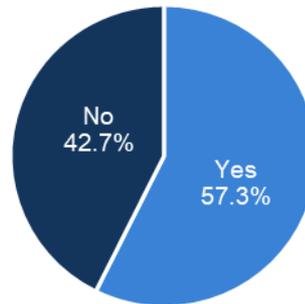
Timing of Decision to Visit



Timing of Decision	2024	2025	% +/-
1 week	11.4%	12.3%	0.9%
2-4 weeks	25.9%	33.3%	7.4%
1-3 months	34.5%	32.9%	-1.6%
4-6 months	13.4%	12.6%	-0.8%
More than 6 months	14.8%	8.8%	-6.0%

Q: How far in advance of your trip did you make your decision to visit the Florida Keys?

Looked for Special Deals

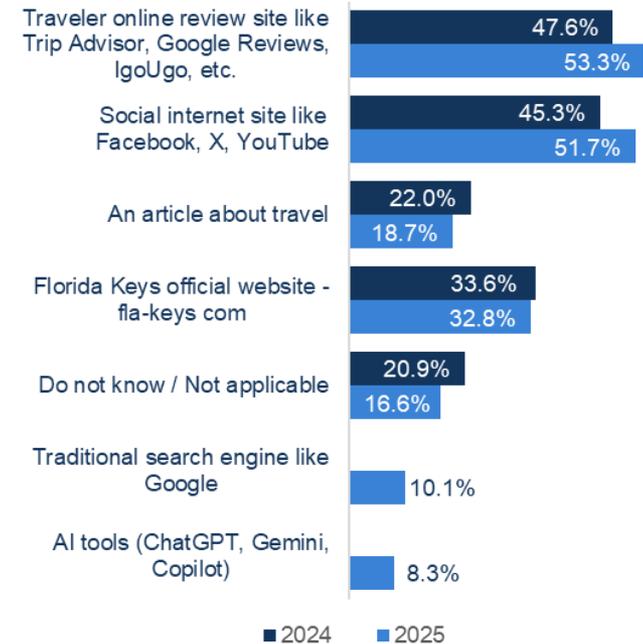


Looked for Deals	2024	2025	% +/-
Yes	66.3%	57.3%	-9.0%
No	33.7%	42.7%	9.0%

*This question was rephrased in 2025 Q4, so those results were excluded*

Q: Did you look for a special deal, like an added value offer, discount for longer stay or coupon, when planning or booking your vacation?

Internet Tools Used to Plan Trip



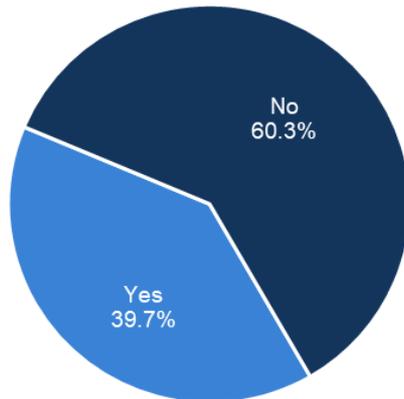
*Search Engine and AI tools were introduced as options in 2025 Q4*

Q: Did you use any of the following internet tools to plan your trip?

# Advertising

- In 2025, almost 40% of Florida Keys Region visitors had seen or heard advertising for the Florida Keys or in the past three months, which 6 percentage points less than last year.
- Of those who had seen or heard advertising, 61% saw advertisements on television. Fifty percent saw ads on the internet or via an email newsletter, while 31% saw ads in a magazine. Another 26% saw ads in the newspaper, and 21% heard an ad on the radio. The greatest increase from 2024 was in the use of newspapers (9.7 points).

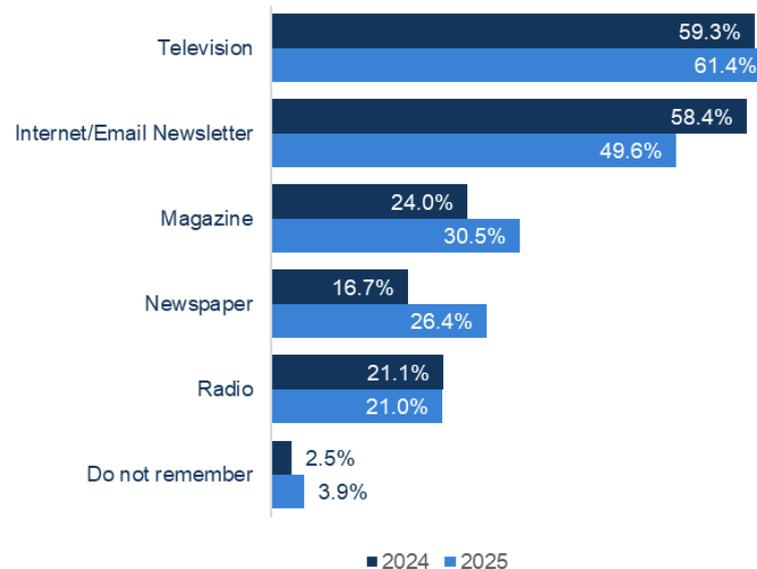
Recently Seen or Heard Advertising



Seen or Heard Advertising	2024	2025	% +/-
Yes	45.8%	39.7%	-6.1%
No	54.2%	60.3%	6.1%

Q: Have you seen or heard any advertising for the Florida Keys and Florida Keys Region in the past 3 months?

Where Respondents Saw Advertising



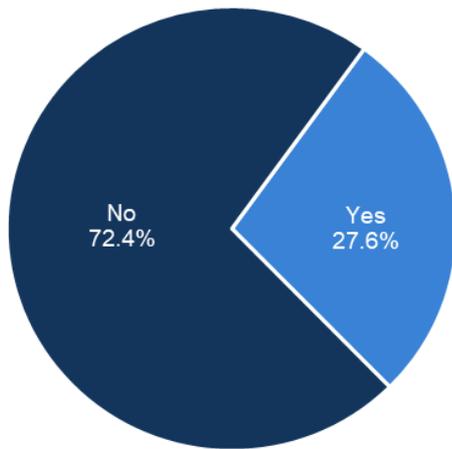
*The answers for this question were changed in 2025 Q4, so those results were excluded*

Q: Where did you see advertising for the Florida Keys and/or Florida Keys Region?

# Visited Other Areas in Florida

- Over one-fourth (27.6%) of Keys visitors visited another area of Florida before or after their stay in the Keys.
- Of those 27% who visited elsewhere, over 62% went to Miami, 46% visited Orlando, and 29% went to Ft. Lauderdale. Over 23% visited the Tampa Area, 22% went to Palm Beach, 14% went to Ft. Myers, and 13% visited the Panhandle.

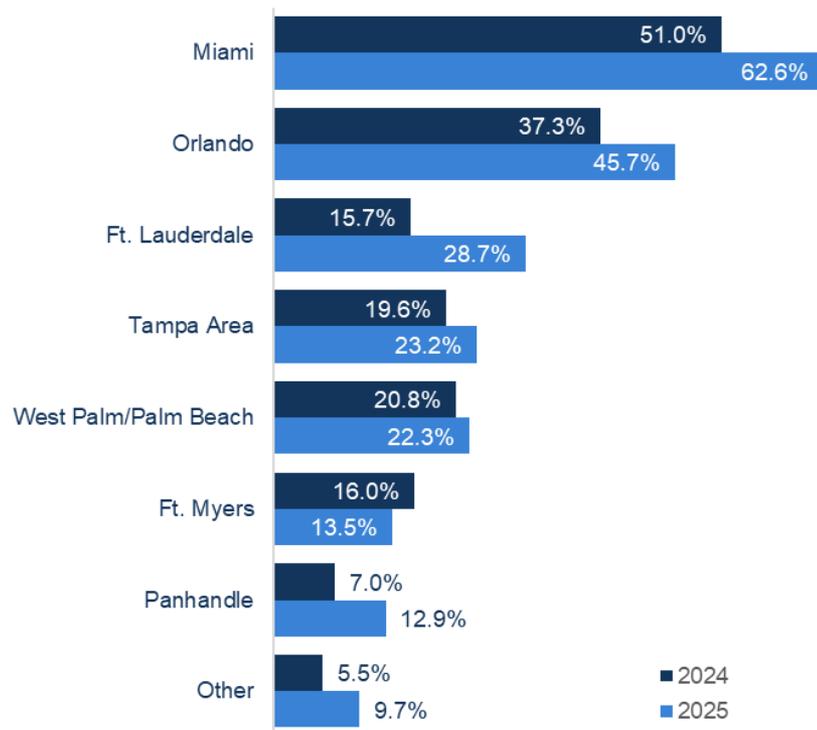
Visited Elsewhere in Florida



Visited Other Places	2024	2025	% +/-
Yes	27.0%	27.6%	0.6%
No	73.0%	72.4%	-0.6%

Q: Did you visit somewhere else in Florida besides the Keys on your trip to the Keys?

Visited Other Places in Florida

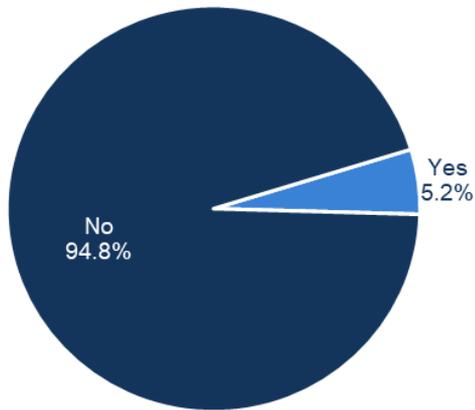


Q: Where else in Florida did you visit besides the Keys?

# Own Property Elsewhere in Florida

- Five percent of Florida Keys visitors in 2025 owned a second home or vacation property elsewhere in Florida.
- Of those visitors, 37% owned property in West Palm/Palm Beach, 35% owned in the Tampa Area, and 28% owned in Miami. Four percent of those who own property elsewhere in Florida are not accounted for in these listed locations.

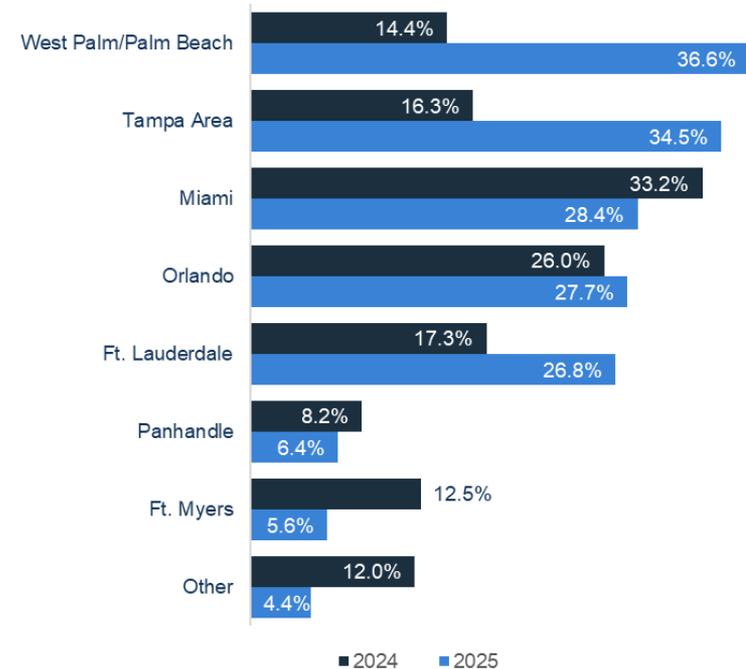
Second Home or Vacation Property in Florida



Own Second Home	2024	2025	% +/-
Yes	6.3%	5.2%	-1.1%
No	93.7%	94.8%	1.1%

Q: Do you own a second home or vacation property in Florida?

Second Home or Vacation Property Located in Florida



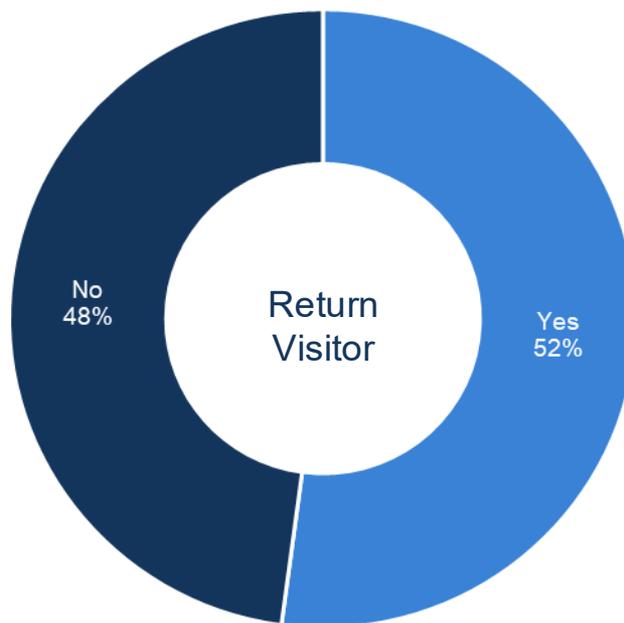
*The question was removed from the survey in 2025 Q4*

Q: Where is your second home or vacation property in Florida?

# Return Visitation of Florida Keys Region Visitors to the Florida Keys

Florida Keys VPS  
Keys-Wide  
Results  
2025

- Fifty-two percent of 2025 Florida Keys visitors had visited the Keys at least one other time in the past three years.



Visited in Past 3 Years	2024	2025	% +/-
Yes	56.0%	52.1%	-3.8%
No	44.0%	47.9%	3.8%

Q: Before this trip to the Keys, had you visited the Keys before in the past 3 years?

# About Rockport Analytics

Rockport Analytics ([www.rockportanalytics.com](http://www.rockportanalytics.com)) is a research and analytical consulting firm providing high quality quantitative and qualitative research solutions to business, government, and non-profit organization clients across the globe. Rockport's focus is on creative and actionable research to help stakeholders in the public, private and non-profit sectors. We provide fast, nimble service in a transparent environment.

## *Rockport Core Competencies Include:*



**Economic Impact  
Assessment**



**Marketing  
Analytics**



**Consumer  
Insight &  
Intelligence**



**Survey Research &  
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**Market Modeling &  
Decision Support**



**Market &  
Industry  
Forecasts**



**Project & Event  
Feasibility**



**Data Synthesis &  
Research Partner  
Collaborations**