



ROCKPORT
ANALYTICS

**LOWER KEYS & BIG PINE KEY
VISITOR PROFILE STUDY
2025 ANNUAL RESULTS
APRIL 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, trip behavior, 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 (635 Total)

| Month | Big Pine Key |
|-----------|--------------|
| January | 58 |
| February | 44 |
| March | 53 |
| April | 46 |
| May | 59 |
| June | 64 |
| July | 34 |
| August | 80 |
| September | 49 |
| October | 55 |
| November | 53 |
| December | 40 |

2025 FL Keys Visitor Highlights

Visitor profile and trip behavior

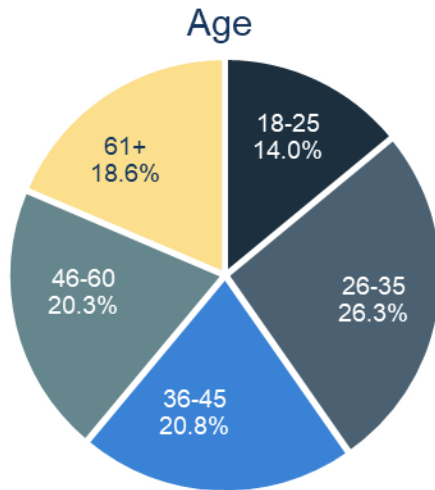
- The average visitor age dropped nearly 2 years to 40.5 in 2025, reversing the aging trend seen in 2024. Millennials surged to 40% of visitors, up 8.7 percentage points, while Gen X dropped 8 points. Males now account for 55% of visitors after females dominated in 2024.
- Texas jumped from 5.3% to 13.2% of out-of-state visitors, making it the number one out-of-state origin in 2025. California also grew, rising to 6.5% of visitors. New York and Georgia, previously top sources, each declined over 2 points.
- Over 70% of 2025 visitors traveled with a spouse, partner, or significant other, up 6.5 points from 2024. Party sizes also grew, with those traveling in groups of three jumping from 17% to 23%. Nearly 70% did not travel with children, down almost 4 points year-over-year.
- The share of visitors staying 1 to 3 nights climbed another 6 points to 87% in 2025, with 4 to 7 night stays dropping to just 10.6%. Average length of stay remained flat at 2.5 nights.
- Average household income among Big Pine Key visitors grew by over \$6,000 year-over-year, reaching \$120,552 in 2025. The largest income bracket remains \$75K to \$150K at 25% of visitors.

Spend, satisfaction, and marketing outcomes

- Total per-person spending fell nearly 10% from \$1,423 in 2024 to \$1,287 in 2025. Declines were seen across every category: food and beverage dropped -\$77, transportation -\$28, lodging -\$36, water recreation -\$21, and retail-\$16.
- Hotels, motels, and resorts grew to 59% of accommodations, up 4.6 points from 2024. More visitors called properties directly (+5 points) or used a travel agent (+4 points), while online travel site bookings continued to decline.
- Trip planning timelines polarized in 2025. The 1 to 3 month booking window dropped 12.7 points, while both the 2 to 4 week and 6-plus month windows grew. Online review sites remained the top planning tool at 49%, with articles about travel also gaining ground.
- Overall advertising awareness fell to 39% of visitors, down nearly 12 points from 51% in 2024. Among those who recalled advertising, TV became the dominant channel at 59%, up 21 points, while internet and email newsletter awareness dropped 25 points.
- The Net Promoter Score rose to 71, up from 58.1 in 2024, with 76% of visitors rating the Keys 9 or 10 out of 10 for likelihood to recommend. Satisfaction held steady at 4.7 out of 5.

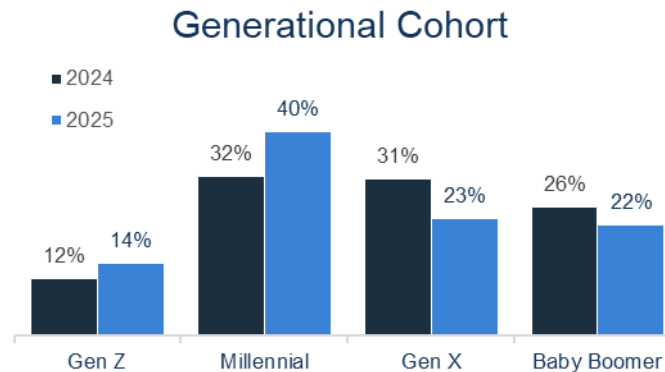
Visitor Demographics: Age, Generational Cohort, and Gender

- The average age of Big Pine Key visitors in 2025 was 40.5, a decrease of 1.9 years from 2024. Over one-fourth (26.3%) of travelers were in the 26–35-year age group.
- Millennials surged from 32% to 40%, while Gen X dropped nearly 8 points to 23%. Gen Z travelers increased 3 points to 14%, while Baby Boomers decreased over 3 points to 22%.
- The gender mix of Big Pine Key visitors has shifted from having more females in 2024 to now having more males (55%) in 2025

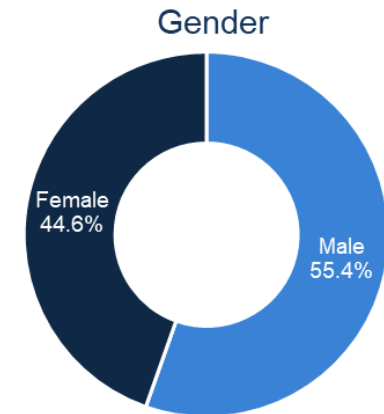


Average Age
2024: 42.4 years
2025: 40.5 years

Q: What is your age?



Q: What is your age?



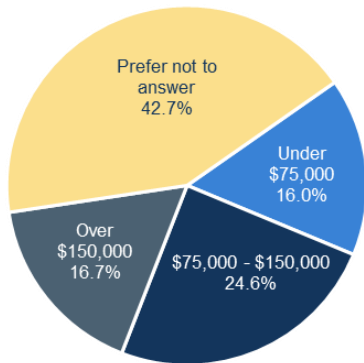
| Gender | 2024 | 2025 | % +/- |
|--------|-------|-------|--------|
| Male | 44.7% | 55.4% | 10.7% |
| Female | 55.3% | 44.6% | -10.7% |

Q: What is your gender?

Visitor Demographics: Income, Ethnicity and Sexual Orientation

- The average household income has increased over \$6K from 2024 and now sits at \$120,552. Most travelers that responded to the question were in the \$75k to \$150k income bracket (25%).
- Most visitors to Big Pine Key in 2025 identified themselves as Non-Hispanic White (73%) despite decreasing 1.1 points year-over-year, while Hispanic travelers had the biggest increase (2.5 points) for the second consecutive year, making up close to 14% of visitors.
- Eighty-nine percent of visitors were straight/heterosexual. Gay/Homosexual travelers accounted for 5% of 2025 visitors, bisexuals represented 4%, and lesbians made up 1% of Big Pine Key visitors.

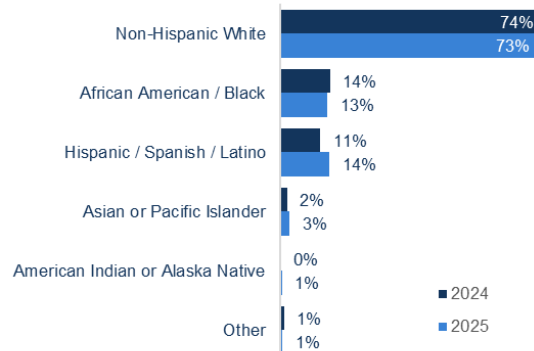
Household Income



Average Household Income
2024: \$114,439
2025: \$120,552

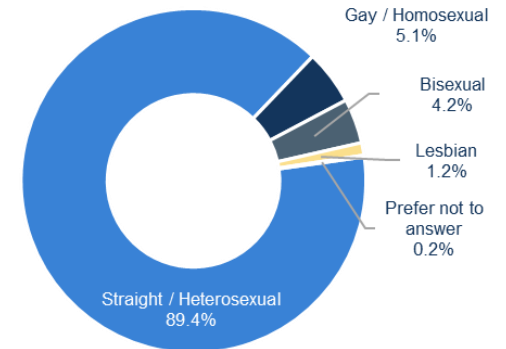
Q: What is the total annual income of your household?

Ethnicity



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

Sexual Orientation

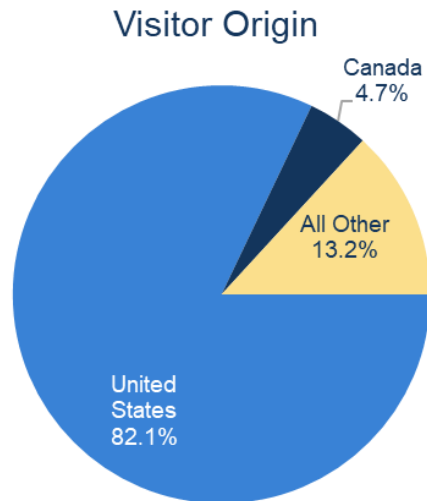


| Sexual Orientation | 2024 | 2025 | % +/- |
|-------------------------|-------|-------|-------|
| Straight / Heterosexual | 88.9% | 89.4% | 0.5% |
| Gay / Homosexual | 4.5% | 5.1% | 0.6% |
| Bisexual | 3.4% | 4.2% | 0.8% |
| Lesbian | 1.2% | 1.2% | 0.0% |
| Prefer not to answer | 2.0% | 0.2% | -1.8% |

Q: Orientation?

Origin of Big Pine Key Visitors

- US-based Big Pine Key visits increased slightly (0.2 points), while international visits declined somewhat, moving from 18.1% of visits in 2024 to 17.9%.
- Of the visitors from the U.S., 20% came from within Florida. Texas (13.2%), California (6.5%), and Georgia (5.9%) accounted for the top states of origin for Big Pine Key visitors. There was an increase of 7.9 points in visits from Texas, as well as an increase of 2 points in visits from California. The states that decreased the most were New York (-2.5 points) and Georgia (-2 points).



| Country of Origin | 2024 | 2025 | % +/- |
|-------------------|-------|-------|-------|
| United States | 81.9% | 82.1% | 0.2% |
| Canada | 3.1% | 4.7% | 1.6% |
| All Other | 15.0% | 13.2% | -1.8% |

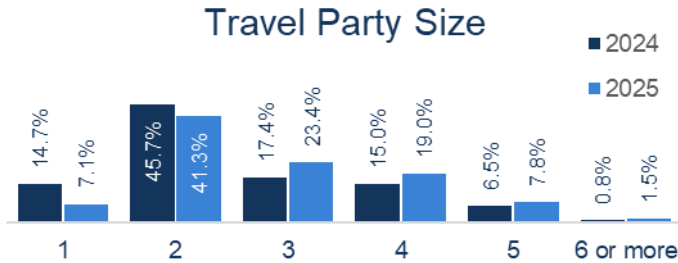
| State of Origin | Percent | |
|-----------------|---------|-------|
| | 2024 | 2025 |
| Florida | 20.6% | 20.1% |
| Texas | 5.3% | 13.2% |
| California | 4.5% | 6.5% |
| Georgia | 7.9% | 5.9% |
| New York | 7.4% | 4.9% |
| Illinois | 4.3% | 4.8% |
| North Carolina | 5.3% | 3.9% |
| Michigan | 3.4% | 3.7% |
| Ohio | 4.2% | 3.1% |
| Massachusetts | 1.2% | 3.1% |

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

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

Travel Party Size and Travel Companions

- The average travel party size of Big Pine Key visitors was 2.9. Those traveling in groups of three increased the most from 2024 (17%) to 2025 (23%).
- Almost 70% of 2025 visitors did not travel with children which is a 3.9 percentage point decrease from 2024.
- Over 70% percent traveled with a spouse, partner, girlfriend, or boyfriend—an increase of 6.5 points over 2024.



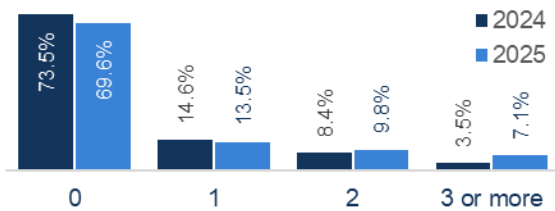
Average Party Size

2024: 2.7

2025: 2.9

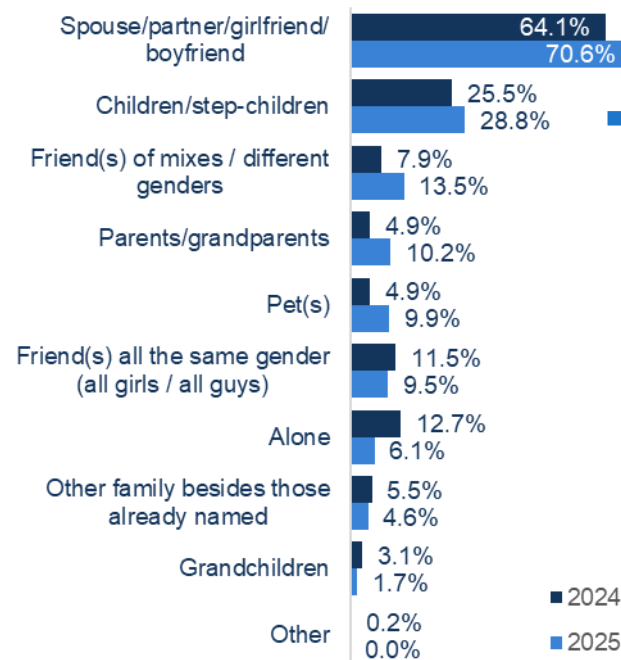
Q: Including yourself, how many people are in your travel party?

Percent Under Age 17



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

Travel Companions



51.5% were traveling as a party of 2 in 2025

Q: Who are you traveling with (Select all that apply)?

Visitors' Length of Stay in Big Pine Key

- The average length of stay for 2025 Big Pine Key visitors remained the same in 2025 at 2.5 nights. The share of visitors staying one-to-three nights climbed six points in 2025, with fewer visitors staying four-to-seven nights.



| Length of Stay in Big Pine Key | | |
|--------------------------------|-------|-------|
| | 2024 | 2025 |
| 1-3 nights | 80.9% | 86.9% |
| 4-7 nights | 16.8% | 10.6% |
| 8 or more nights | 2.3% | 2.5% |
| Average | 2.5 | 2.5 |

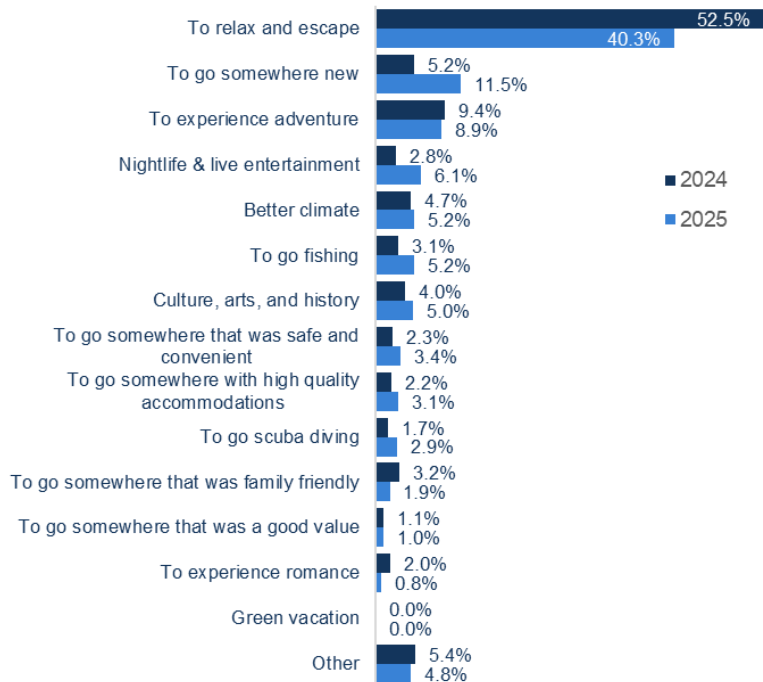
Q: How many nights will you stay in each of the Florida Keys?



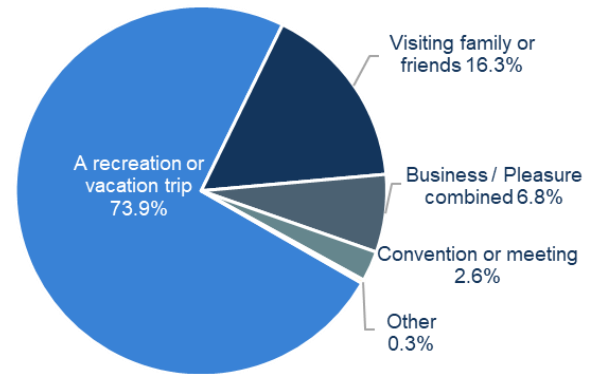
Primary Reasons and Experiences That Drive Visitors to the Keys

- Most Big Pine Key visitors traveled to the Keys primarily to relax and escape (40%). However, that share dropped over 12 points from 2024. This was followed by travelers who wanted to go somewhere new, which climbed 6.3 points compared to 2024.
- When asked about the primary purpose for the visit to the Keys, around 74% of Big Pine Key visitors indicated it was a recreation or vacation trip. This was an increase of over 2 points compared to 2024, while 16% indicated their trip purpose was to visit family or friends—a decline of over 2 points.

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 | 71.6% | 73.9% | 2.3% |
| Visiting family or friends | 18.6% | 16.3% | -2.3% |
| Business / Pleasure combined | 8.4% | 6.8% | -1.6% |
| Convention or meeting | 0.8% | 2.6% | 1.8% |
| Other | 0.6% | 0.3% | -0.3% |

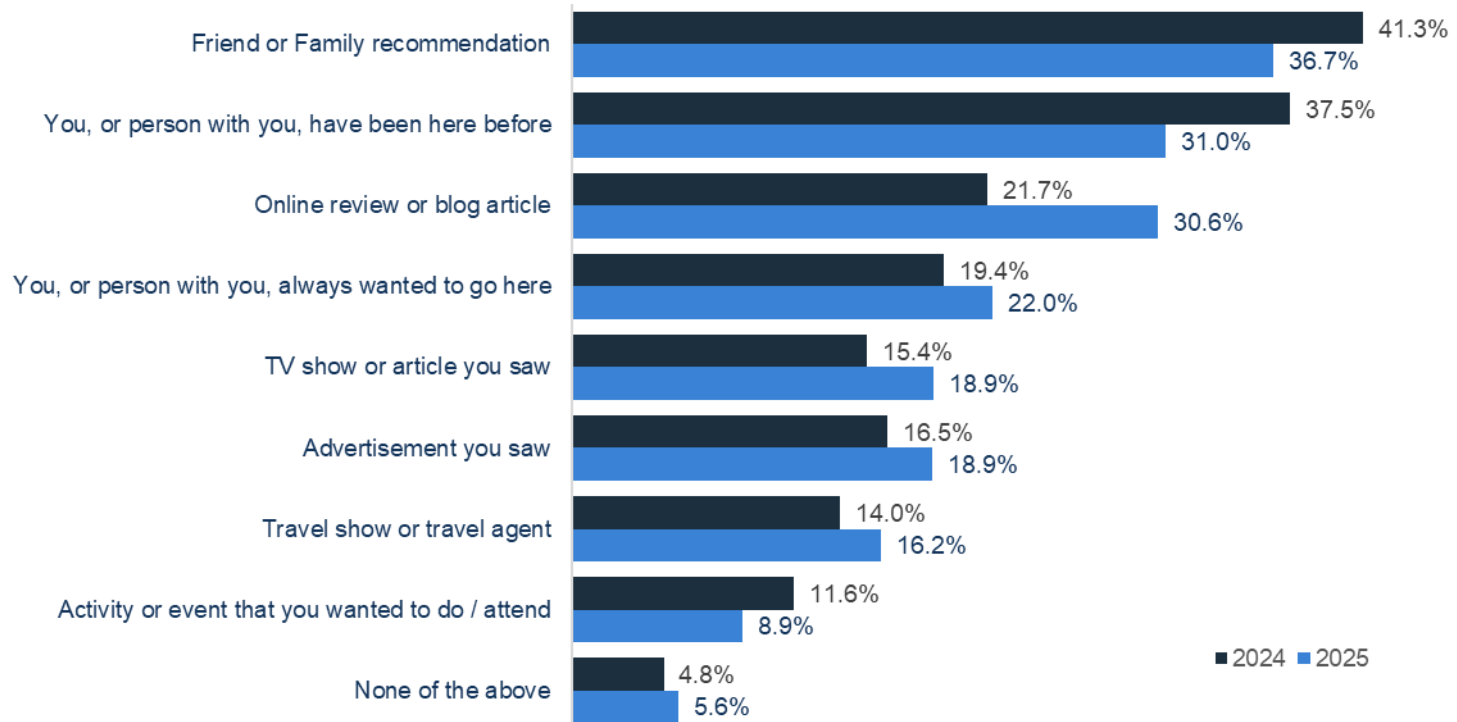
Q: Which ONE of your experiences BEST describes why you decided to visit the Florida Keys?

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

Key Influencers for Visits to Big Pine Key

- The key influencers for visits to Big Pine Key shifted in 2025, with the top reasons from last year losing some ground to options such as online reviews and blog articles (31%), which increased almost 9 points year-over-year, and TV shows (up 3.5 points to 18.9%). Friend or family recommendation remained the main influence for trips to Big Pine Key, with over 36% of respondents selecting that option, followed by repeat visits (31%).

Key Influencer in Visiting the Florida Keys

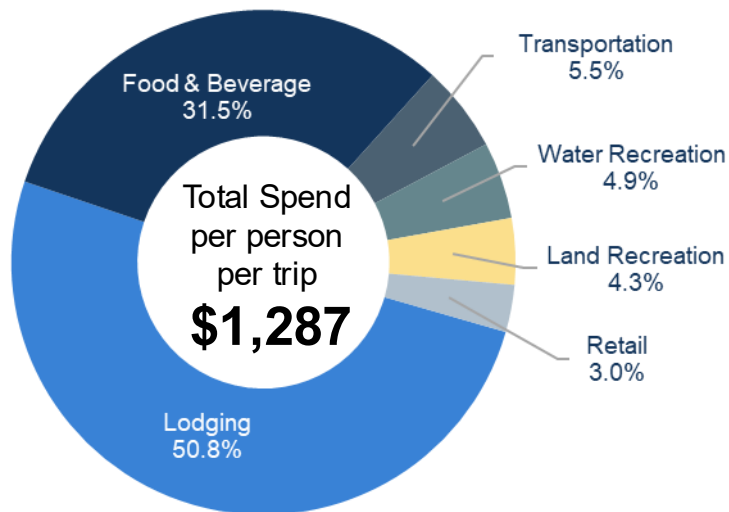


Q: Which of the following influenced you to first think about the Florida Keys? (Select all that apply)

Big Pine Key Visitor Spending

- Overall 2025 spending averaged \$1,287 per person per trip, a decrease of \$136 compared to 2024.
- All spend categories were lower on average in Big Pine Key. Food and beverage declined the most in dollar terms (-\$77), while retail declined the most in percentage terms (-29%).

Average Spent Per Person Per Trip



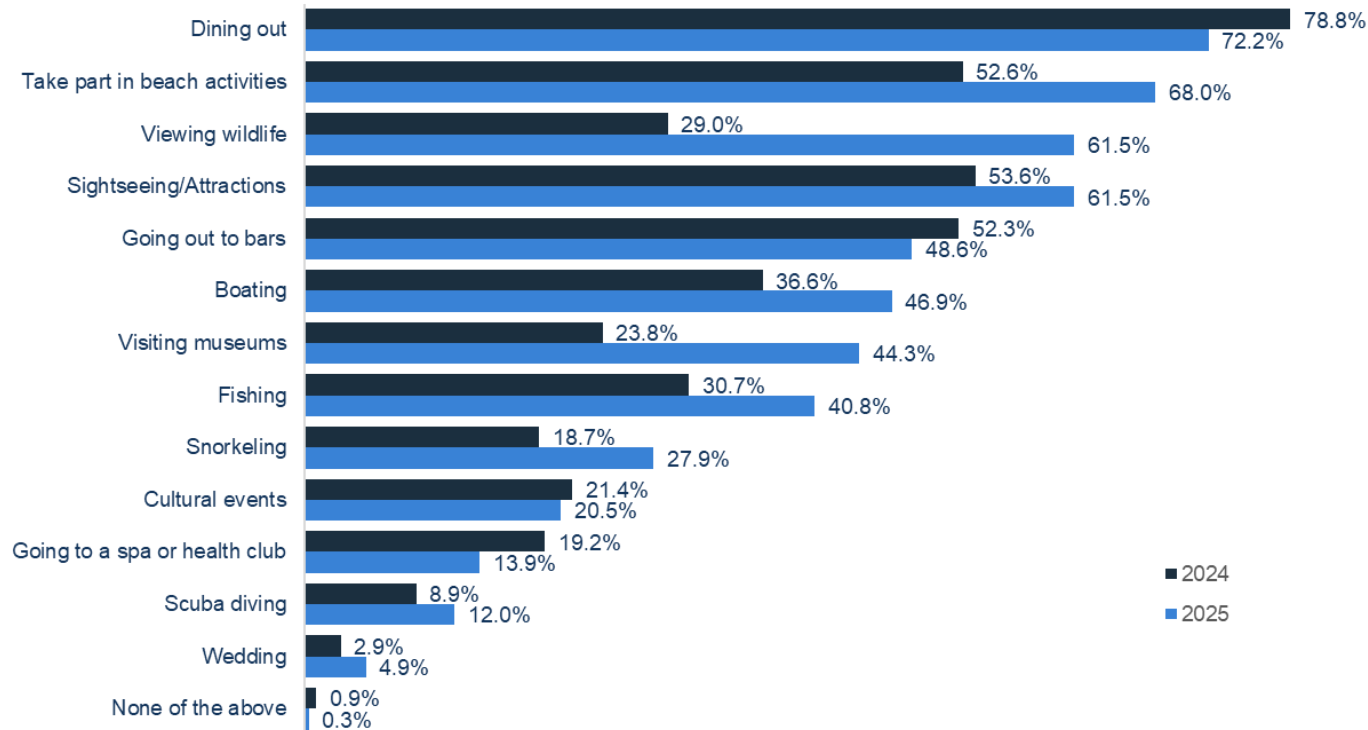
| Spending Category | Average per person per trip | | |
|-------------------|-----------------------------|----------------|---------------|
| | 2024 | 2025 | \$ +/- |
| Lodging | \$689 | \$653 | -\$36 |
| Food & Beverage | \$482 | \$405 | -\$77 |
| Transportation | \$99 | \$71 | -\$28 |
| Water Recreation | \$84 | \$63 | -\$21 |
| Land Recreation | \$69 | \$55 | -\$14 |
| Retail | \$55 | \$39 | -\$16 |
| Total | \$1,423 | \$1,287 | -\$136 |

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

Big Pine Key Visitor Activity Participation

- The activities Big Pine Key visitors engaged in during their 2025 visit mainly included dining out (72.2%), outdoor activities such as going to the beach (68%), and viewing wildlife (61.5%).
- Big Pine Key visitors in 2025 were more likely to engage in viewing wildlife (+33 points), going to museums (+21 points), and going to the beach (+15 points), and they were less likely to dine out (-7 points), go to a spa (-5 points), and go out to bars (-4 points).

Activities That Travel Party Members Participated In

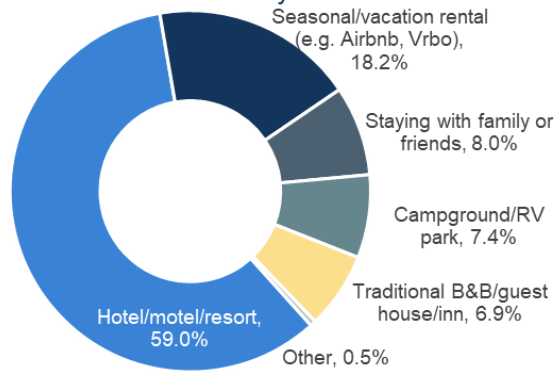


Q: While visiting the Florida Keys or Big Pine Key, have you or anyone from your group gone: (Select all that apply)

Visitor Accommodations and Reservations

- Most visitors (59%) stayed in a hotel, motel, or resort in 2025—up 4.6 points from last year. Use of traditional bed and breakfasts declined the most (-4.8 points).
- In 2025, reservations made online through a travel site (Expedia, Travelocity, etc.) were still the most common method (38%) but many visitors opted to call the property directly (18.6%, for an increase of 5 points) and use a travel agent to arrange their accommodation (12.6%, for an increase of 4 points).

Primary Accommodations in the Keys



| Accommodations During Visit | 2024 | 2025 | % +/- |
|--|-------|-------|-------|
| Hotel/motel/resort | 54.4% | 59.0% | 4.6% |
| Seasonal/vacation rental (e.g. Airbnb, Vrbo) | 16.8% | 18.2% | 1.4% |
| Staying with family or friends | 10.5% | 8.0% | -2.5% |
| Campground/RV park | 5.4% | 7.4% | 2.0% |
| Traditional B&B/guest house/inn | 11.7% | 6.9% | -4.8% |
| Other | 1.2% | 0.5% | -0.7% |

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

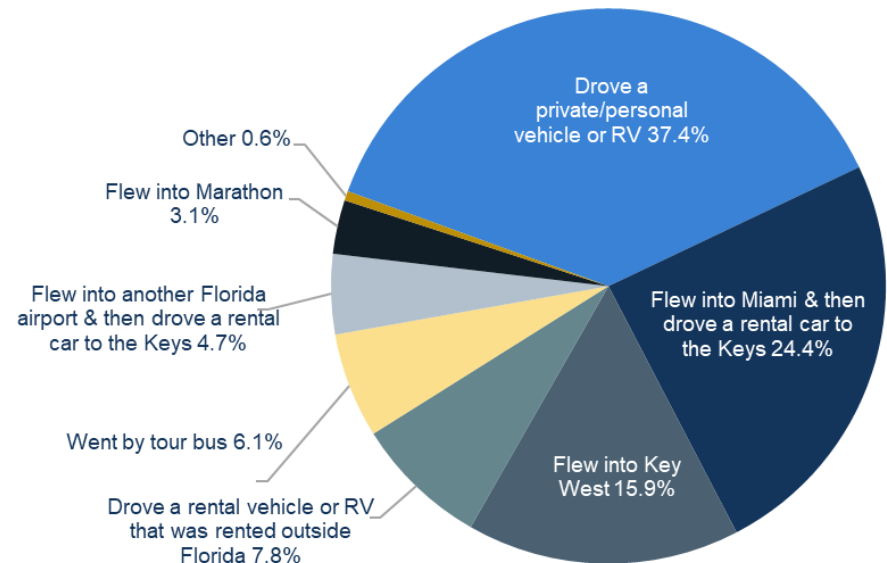
Q: When making your reservations for your accommodations, did you ...

Big Pine Key Visitor Transportation to the Keys

- In 2025, use of a personal vehicle or RV was still the most common mode of transportation (37%), increasing 1.8 points compared to 2024. The mode of transportation with the largest increase in 2025 was flying into Miami and then driving a rental car to the Keys, while the largest decrease in mode of transportation to Big Pine Key was in visitors who flew into Key West, which went down 11.2 points.

Primary Mode of Transportation to the Keys

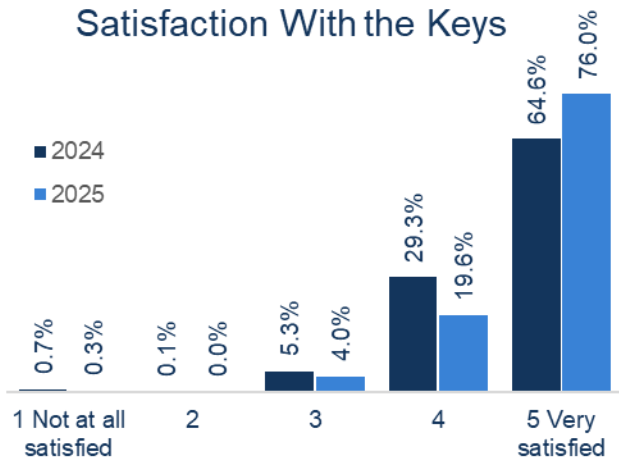
| Primary Mode of Transportation | 2024 | 2025 | % +/- |
|---|-------|-------|--------|
| Drove a private/personal vehicle or RV | 35.6% | 37.4% | 1.8% |
| Flew into Miami & then drove a rental car to the Keys | 16.7% | 24.4% | 7.7% |
| Flew into Key West | 27.1% | 15.9% | -11.2% |
| Drove a rental vehicle or RV that was rented outside Florida | 11.1% | 7.8% | -3.3% |
| Went by tour bus | 3.1% | 6.1% | 3.0% |
| Flew into another Florida airport & then drove a rental car to the Keys | 3.2% | 4.7% | 1.5% |
| Flew into Marathon | 2.7% | 3.1% | 0.4% |
| Other | 0.6% | 0.6% | 0.0% |



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

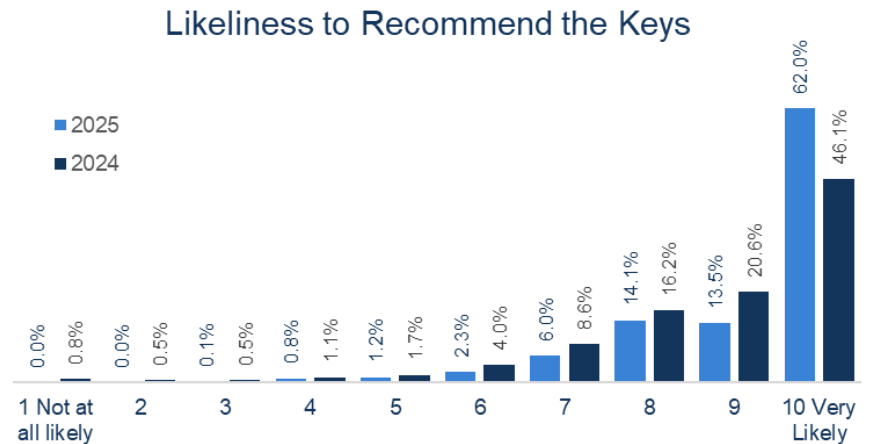
Satisfaction With the Keys and Recommendations to Visit the Keys

- The 2025 average Big Pine Key visitor satisfaction rating of the Florida Keys was 4.7 out of 5—remaining the same as the previous year. Approximately 20% of visitors rated their satisfaction a 4 out of 5, and another 76% were very satisfied (5/5)—up over 11 points from 2024. Four percent were neutral regarding their satisfaction (3).
- The average rating of those who would recommend the Keys to a friend or family member was 9.2 out of 10, which is only slightly lower than the 2024 rating of 9.4. Almost 76% of visitors were promoters, ranking the Keys as 9 or 10. Only four percent were detractors, ranking the Keys between 1 and 6. The net promoter score (promoters minus detractors) was 71, which is considerably higher than last year, meaning visitors in 2025 were much more likely to recommend the Keys.



Average Satisfaction
2024: 4.7
2025: 4.7

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?



Average = 9.2
NPS Score
2024: 58.1
2025: 71.0

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

- 2025 Big Pine Key visitors most commonly (31%) made their decision 2-4 weeks in advance. Visitors that planned their visit six months in advance increased around 7 points, while those that planned their visit one-to-three months in advance decreased 12.7 points.
- Slightly more visitors to Big Pine Key looked for special deals when booking their trip (56%, an increase of 1.7 points from 2024).
- The most common tool used to plan the trip remained online review sites (49%; up 6 points), followed by social internet sites (45%; up 1.6 points), and articles about travel (22%; up 5.3 points).

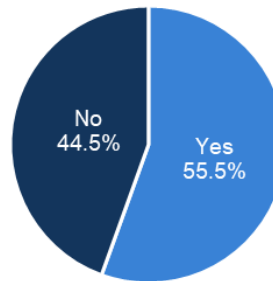
Timing of Decision to Visit



| Timing of Decision | 2024 | 2025 | % +/- |
|--------------------|-------|-------|--------|
| 1 week | 12.3% | 10.9% | -1.4% |
| 2-4 weeks | 24.1% | 30.6% | 6.5% |
| 1-3 months | 38.6% | 25.9% | -12.7% |
| 4-6 months | 16.8% | 17.7% | 0.9% |
| More than 6 months | 8.1% | 15.0% | 6.9% |

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

Looked for Special Deals

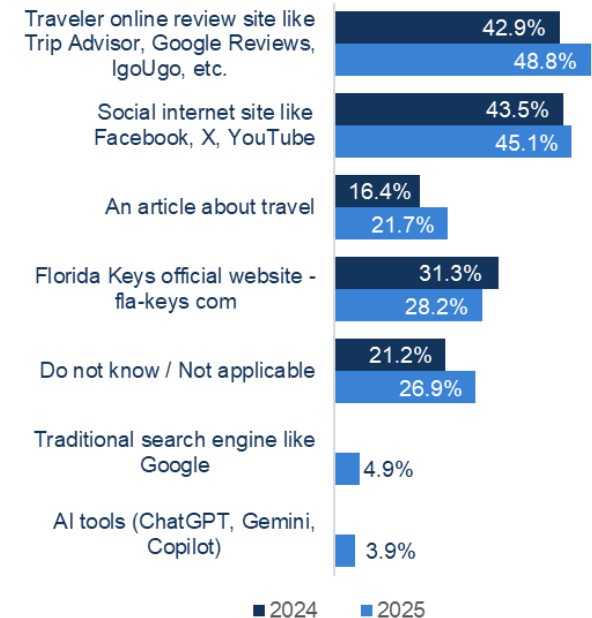


| Looked for Deals | 2024 | 2025 | % +/- |
|------------------|-------|-------|-------|
| Yes | 53.8% | 55.5% | 1.7% |
| No | 46.2% | 44.5% | -1.7% |

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



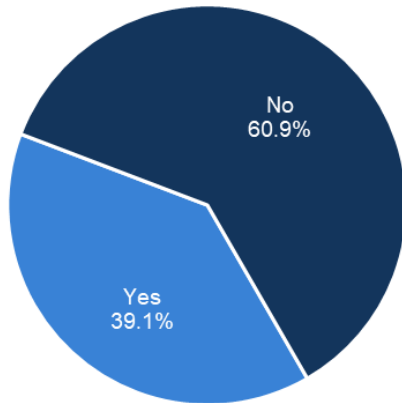
Search Engine and AI tools were introduced as options in 2025 Q4

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

Advertising

- In 2025, much less visitors had seen or heard advertising for the Florida Keys or Big Pine Key in the past three months, going from 51% in 2024 to 39% in 2025.
- Of these 39% who had seen or heard advertising, 59% saw advertisements on TV, followed by the internet or Email newsletters (41.9%). The biggest increase was in respondents who had seen TV ads (+21 points), while internet and newsletter advertisement awareness dropped 25 points in 2025.

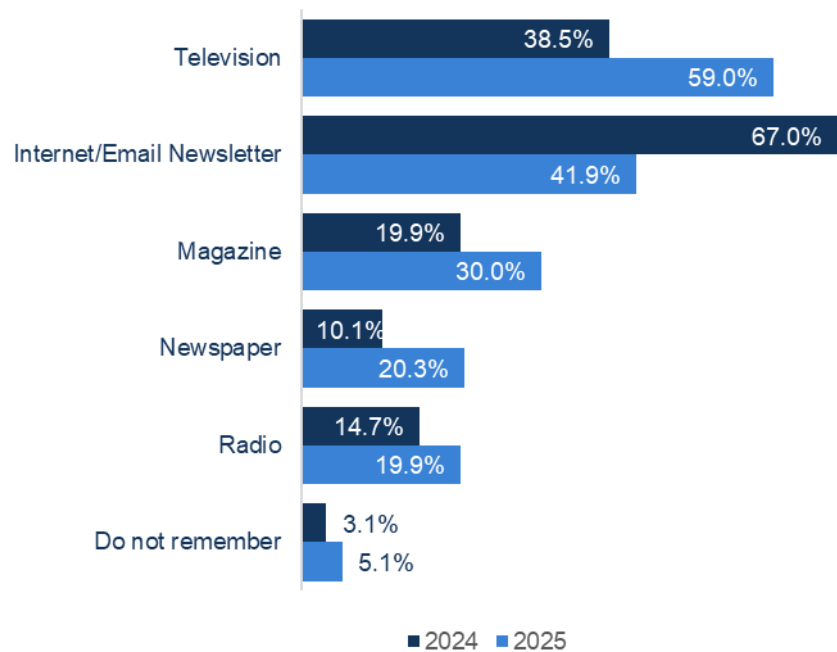
Recently Seen or Heard Advertising



| Seen or Heard Advertising | 2024 | 2025 | % +/- |
|---------------------------|-------|-------|--------|
| Yes | 50.8% | 39.1% | -11.7% |
| No | 49.2% | 60.9% | 11.7% |

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

Where Respondents Saw Advertising



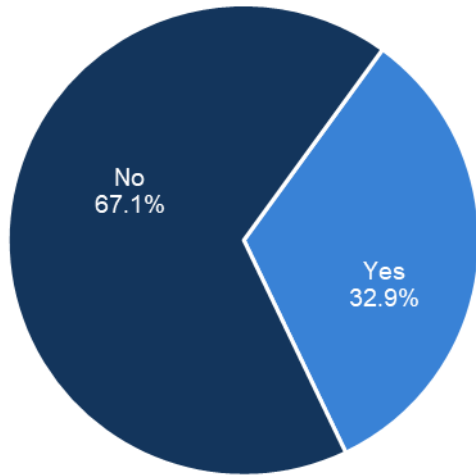
The answers for this question were changed in 2025 Q4, so those results were excluded

Q: Where did you see advertising for the Florida Keys and/or Big Pine Key?

Visited Other Areas in Florida

- Thirty-three percent of Big Pine Key visitors went to other places in Florida during their trip, which is an increase of almost 16 points year-over-year.

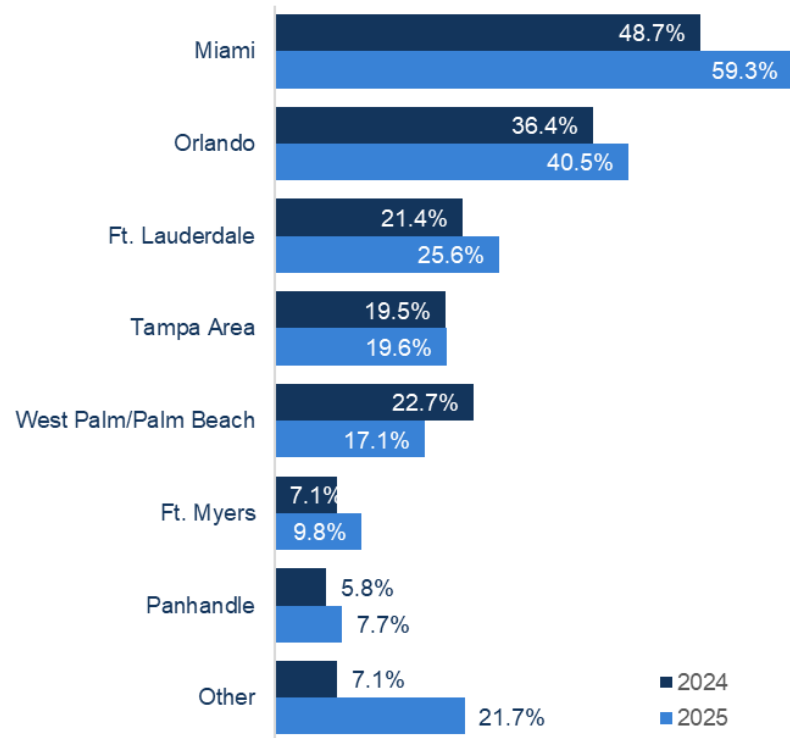
Visited Elsewhere in Florida



| Visited Other Places | 2024 | 2025 | % +/- |
|----------------------|-------|-------|--------|
| Yes | 17.1% | 32.9% | 15.8% |
| No | 82.9% | 67.1% | -15.8% |

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

Visited Other Places in Florida

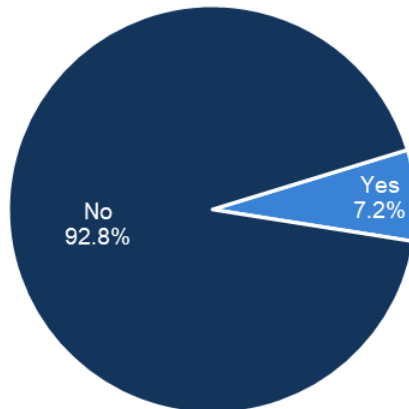


Q: Where else in Florida did you visit besides the Keys?

Own Property Elsewhere in Florida

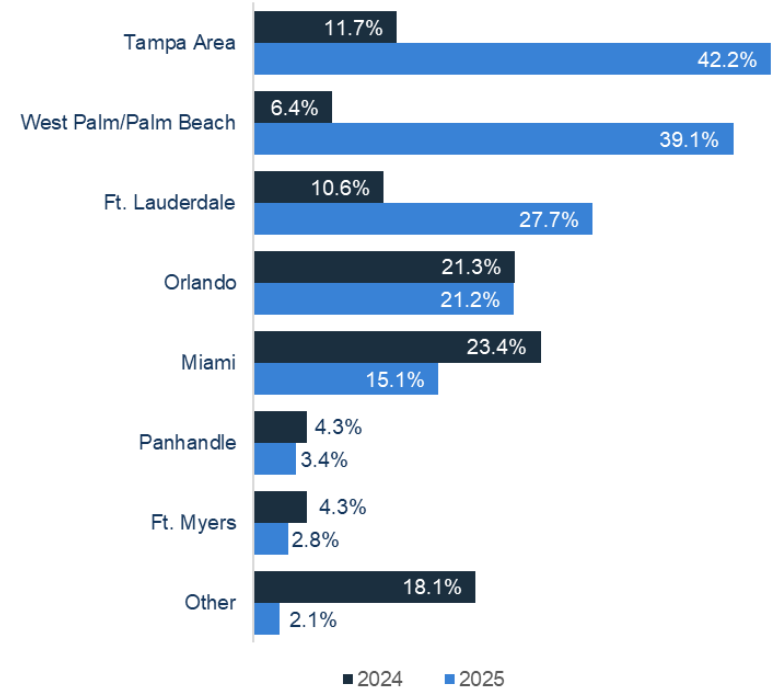
- Over seven percent of Big Pine Key visitors owned a second home in Florida.
- The respondents that owned a second home in the Keys most cited Tampa (42%), West Palm/Palm Beach (39%), and Ft. Lauderdale (28%) as the location of their vacation properties.

Second Home or Vacation Property in Florida



| Own Second Home | 2024 | 2025 | % +/- |
|-----------------|-------|-------|-------|
| Yes | 9.3% | 7.2% | -2.1% |
| No | 90.7% | 92.8% | 2.1% |

Second Home or Vacation Property Located in Florida

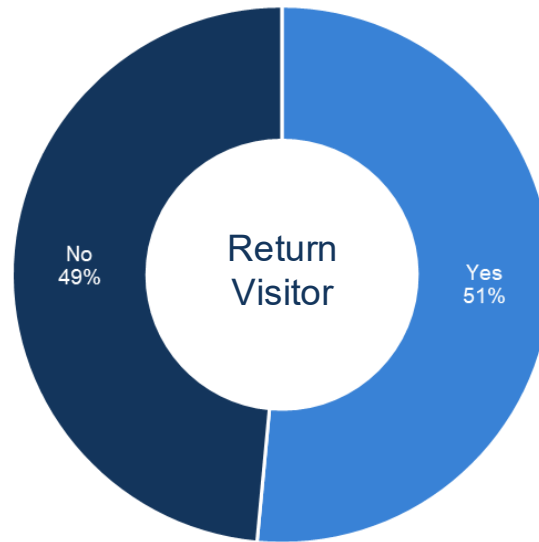


Q: Do you own a second home or vacation property in Florida?

The question was removed from the survey in 2025 Q4
Q: Where is your second home or vacation property in Florida?

Return Visitation of Big Pine Key Visitors to the Florida Keys

- Fifty-seven percent of 2024 Big Pine Key visitors had visited the Florida Keys at least one other time in the past three years.



| Visited in Past 3 Years | 2024 | 2025 | % +/- |
|-------------------------|-------|-------|-------|
| Yes | 56.7% | 51.5% | -5.2% |
| No | 43.3% | 48.5% | 5.2% |

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) is a research and analytical consulting firm providing high quality quantitative and qualitative research solutions to business, government, and non-profit organizations 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.

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