



ROCKPORT
ANALYTICS

ISLAMORADA 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 (523 Total)

Month	Islamorada
January	42
February	95
March	16
April	56
May	20
June	39
July	47
August	19
September	84
October	37
November	35
December	33

2025 Islamorada Visitor Highlights

Visitor profile and trip behavior

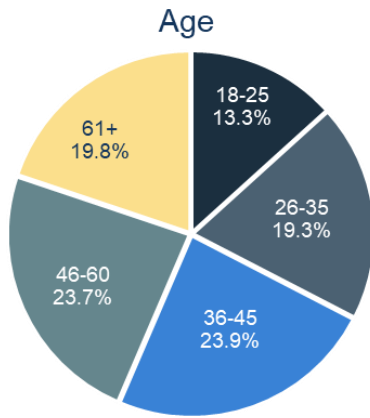
- The average visitor age jumped 4 years to 44.1 in 2025. Baby Boomers saw the largest generational gain (up 3.9 points to 23%), while Gen X had the sharpest decline (down 6.6 points). Visitors aged 61 and over rose 4.2 percentage points to 20% of the mix.
- Males accounted for 61% of Islamorada visitors in 2025, up nearly 10 points from 2024 — the most pronounced gender skew in the district since 2022.
- Domestic visitors surged to 94.5% of all arrivals, up over 12 points from 2024, as international visitation waned sharply.
- The length of stay for Islamorada visitors climbed 0.7 nights in 2025, as hotels, motels and resorts grew to 68.5% of accommodations, up 8.3 points. Online travel site reservations fell nearly 18 points to 37%, while direct booking via property websites rose 11 points and travel agent usage climbed 9 points.
- Average household income rose from \$109,180 in 2024 to \$129,664 in 2025, a gain of over \$20,000. A third of 2025 visitors reported incomes over \$150,000.
- Snorkeling saw the biggest activity jump of any category, rising 10.7 points to 31% participation. Museum visits fell 10.6 points and beach activities dropped 11.1 points. Dining out remained the most common activity at 69%.

Spend, satisfaction, and marketing outcomes

- Total per-person spending declined modestly to \$1,120 from \$1,131 in 2024. Lodging was the standout, rising 13.8% to \$560 and accounting for half of all visitor spend. Land recreation increased 6% and retail fell 23%, while food and beverage declined 11% to \$332.
- Long-lead planning declined in 2025 — the share booking more than 6 months out fell 16.4 points to just 2.3%. Last-minute planning surged, with the 1-week decision window rising 8.2 points and the 2–4 week window growing 7.1 points.
- Overall advertising awareness dropped to 40% of visitors, down 9.5 points. Among those who recalled ads, TV dominated at 66%, followed by internet and email newsletters at 52%.
- Relaxing and escaping rose 4.6 points to 47% as the top visit motivator. Satisfaction remained strong at 4.7/5, with 98% of visitors satisfied or very satisfied and NPS at 70.1.

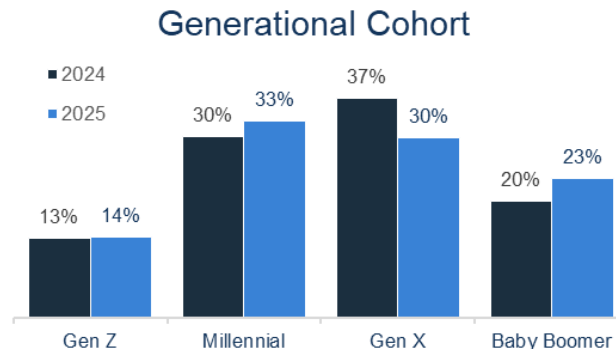
Visitor Demographics: Age, Generational Cohort, and Gender

- The average age of Islamorada visitors in 2025 was 44.1, an increase of 4 years from 2024. The largest age group of Islamorada visitors was those between 36-45, comprising 23.8% of visitors. Closely followed by travelers aged 46-60 (23.6%; a decline of 6.8 points), and travelers 61 and over (20.1%), which was the segment that saw the largest year-over-year increase (+4.2 points).
- Millennials made up the largest portion of 2025 visitors (33%). Baby Boomers saw the largest increase in 2025, increasing 3.9 points to 23.4%, while Gen X saw the largest decline, dropping 6.6 points to 30.1%.
- The gender mix of Islamorada visitors skewed even more toward male visitors in 2025, with 61% of visitors indicating they were males—an increase of over 9 points.

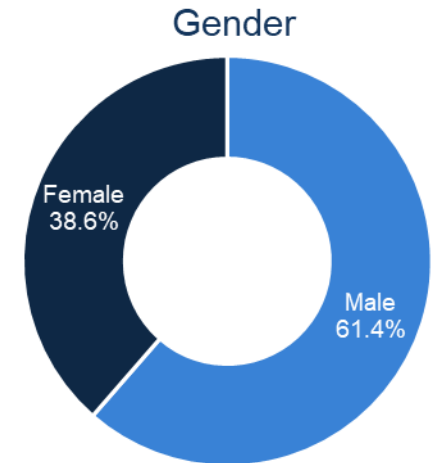


Average Age
2024: 40.1 years
2025: 44.1 years

Q: What is your age?



Q: What is your age?



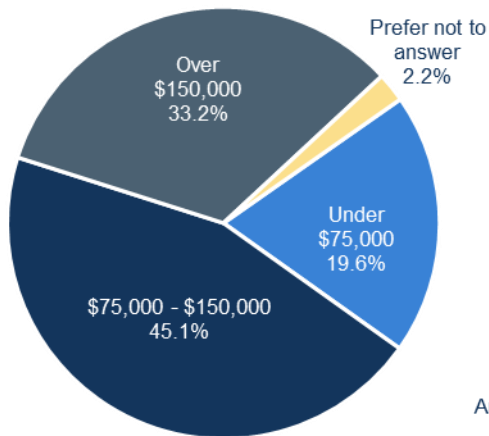
Gender	2024	2025	% +/-
Male	51.7%	61.4%	9.7%
Female	47.7%	38.6%	-9.1%

Q: What is your gender?

Visitor Demographics: Income, Ethnicity and Sexual Orientation

- The average household income increased over \$20k in 2025. The largest portion of Islamorada visitors fell into the \$75-\$150,000 income range, like the previous year.
- In 2025, as in the previous year, 73% of Islamorada visitors were non-Hispanic white, while slightly fewer travelers indicated they were African American (-4.8 points). Hispanic/Spanish/Latino visitors made up 13% of the visitors—unchanged from 2024. Asian or Pacific Islanders comprised 2% of visitors, American Indian or Alaska Native made up 1%, and “other, not listed” accounted for 1%.
- Eighty-nine percent of visitors were straight/heterosexual—a decrease of almost five points, as the share of visitors that indicated they were bisexual climbed 6.5 points year-over-year to 9.4%.

Household Income

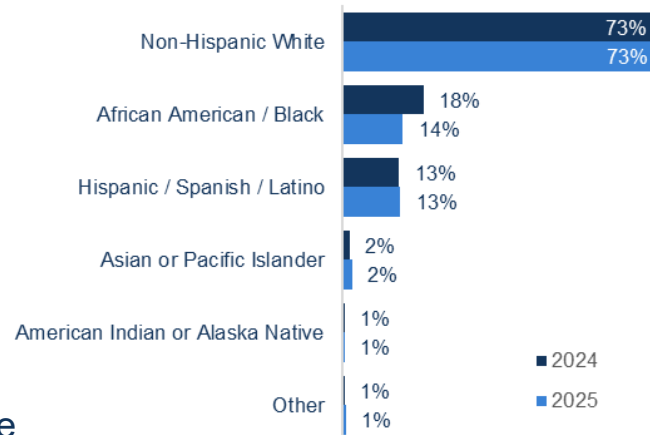


Average Household Income

2024: \$109,180
2025: \$129,664

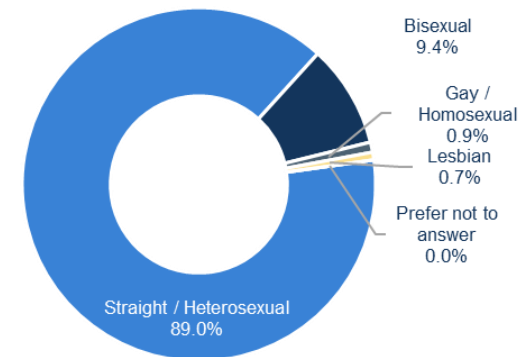
Q: What is the total annual income of your household?

Ethnicity



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

Sexual Orientation



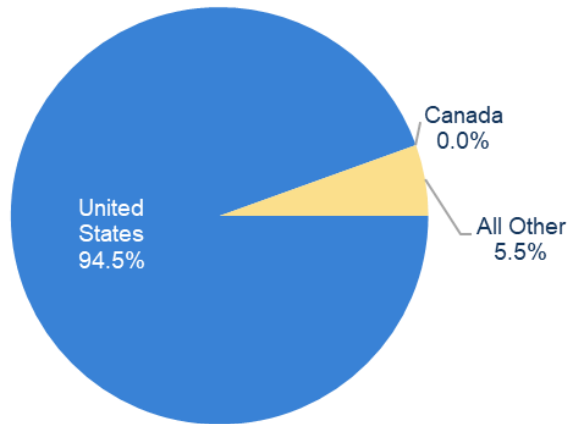
Sexual Orientation	2024	2025	% +/-
Straight / Heterosexual	93.7%	89.0%	-4.7%
Bisexual	2.9%	9.4%	6.5%
Gay / Homosexual	1.6%	0.9%	-0.7%
Lesbian	1.3%	0.7%	-0.6%
Prefer not to answer	0.5%	0.0%	-0.5%

Q: Orientation?

Origin of Islamorada Visitors

- Fewer international travelers visited Islamorada in 2025, with an increase of over 12 points in domestic visitors, as international visitors waned.
- Of the visitors from the U.S., over 18% came from within Florida, a decline of over 2 percentage points from 2024. California accounted for the second most Islamorada visitors (almost 9%) with a decrease of 1.2 percentage points. Delaware had the highest increase in 2025, going up over 3 points compared to 2024, while New York visitors had the largest decrease among out-of-state visitors (-1.6 points)

Visitor Origin



Country of Origin	2024	2025	% +/-
United States	81.9%	94.5%	12.6%
Canada	3.1%	0.0%	-3.1%
All Other	15.0%	5.5%	-9.5%

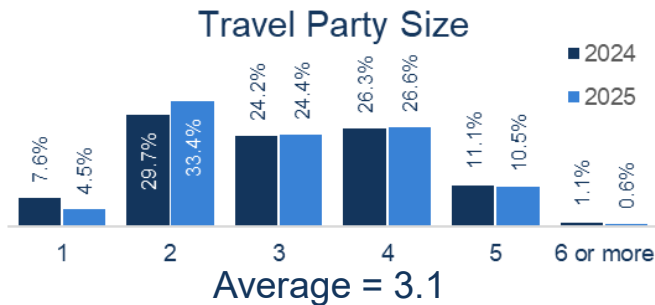
State of Origin	Percent	
	2024	2025
Florida	20.6%	18.4%
California	9.7%	8.5%
Texas	6.7%	8.5%
New York	9.2%	7.6%
Georgia	4.4%	4.7%
Ohio	3.6%	4.5%
Pennsylvania	3.9%	4.2%
Delaware	0.3%	3.6%
Illinois	3.6%	3.5%

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

All other states were <2.0% each
Q: Where in the U.S. do you live?

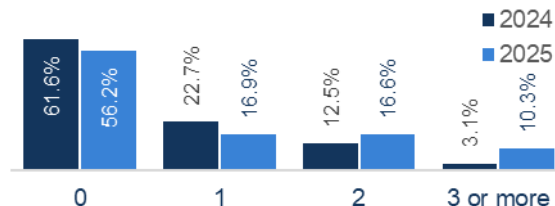
Travel Party Size and Travel Companions

- The average travel party size of Islamorada visitors was 3.1—a small decline from 3.2 in 2024. Those traveling in pairs made up 33% of all travel party groups (up 3.7 points). Groups of 3 and 4 accounted for 24% and 27%, respectively.
- Fifty-six percent of travel parties did not include children under age 17. There were more visitors traveling with three or more minors in 2025 (10.3%), increasing 7.2 points.
- Almost 80% traveled with a spouse, partner, girlfriend, or boyfriend, and 39% traveled with children or step-children. Almost 10% were traveling with friends of different genders.



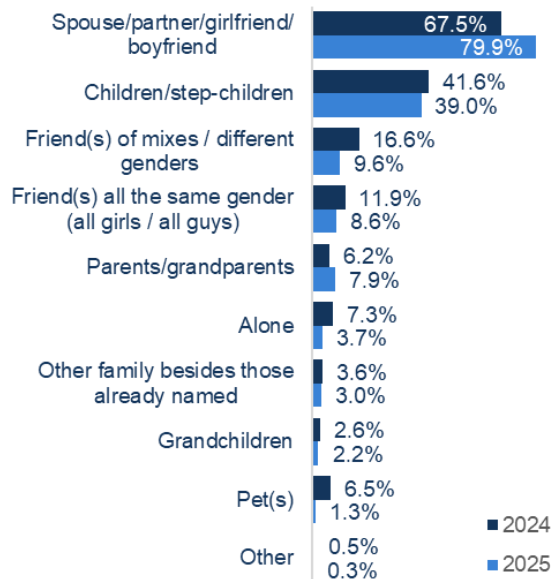
Q: Including yourself, how many people are in your travel party?

Percent Under Age 17



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

Travel Companions



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

38% were traveling as a party of 2 in 2025, compared to 36% in 2024

Visitors' Length of Stay in Islamorada

- The average length of stay for 2025 Islamorada visitors was 2.3 nights—an increase of 0.7 nights compared to 2024's 1.6 nights. A greater number of 2025 visitors opted for stays of four-to-seven nights, with that option climbing two points.



Length of Stay in Islamorada		
	2024	2025
1-3 nights	91.6%	89.3%
4-7 nights	7.2%	9.2%
8 or more nights	1.2%	1.6%
Average	1.6	2.3

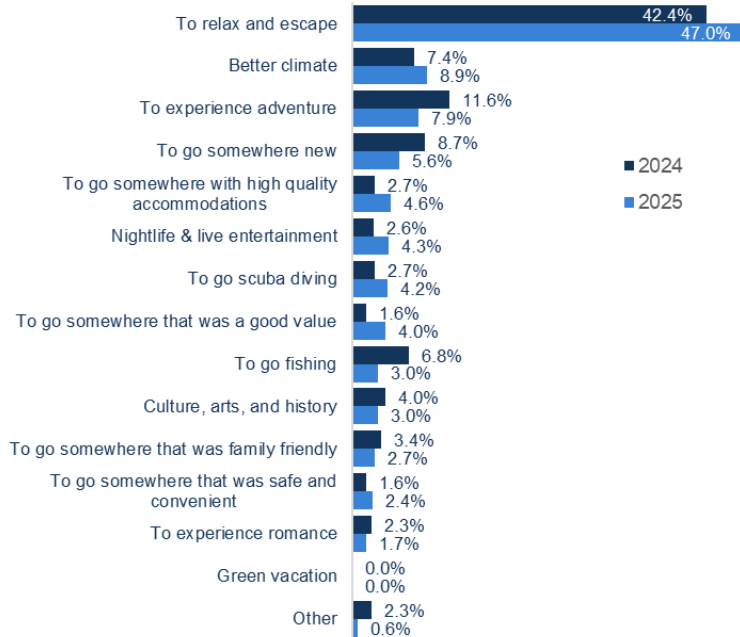
Q: How many nights will you stay in each of the Florida Keys?



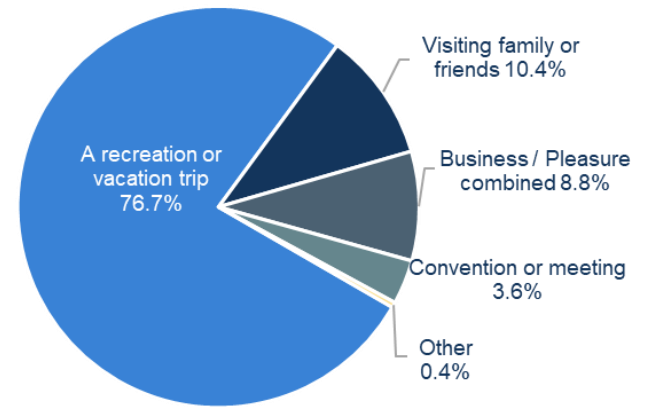
Primary Reasons and Experiences That Drive Visitors to the Keys

- Islamorada visitors traveled to the Keys primarily to relax and escape again in 2025, with this option increasing 4.6 points to 47%. Other reasons that increased in popularity include going somewhere that was a good value (up 2.4 points), going somewhere with high-quality accommodations (+1.9 points), and nightlife and live entertainment (+1.7 points).
- When asked about the primary purpose for the visit to the Keys, over 76% of Islamorada visitors indicated it was a recreation or vacation trip. 2025 visitors were 2.8 percentage points more likely to have attended a convention or meeting in the Keys.

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	74.5%	76.7%	2.2%
Visiting family or friends	17.4%	10.4%	-7.0%
Business / Pleasure combined	6.5%	8.8%	2.3%
Convention or meeting	1.0%	3.6%	2.6%
Other	0.5%	0.4%	-0.1%

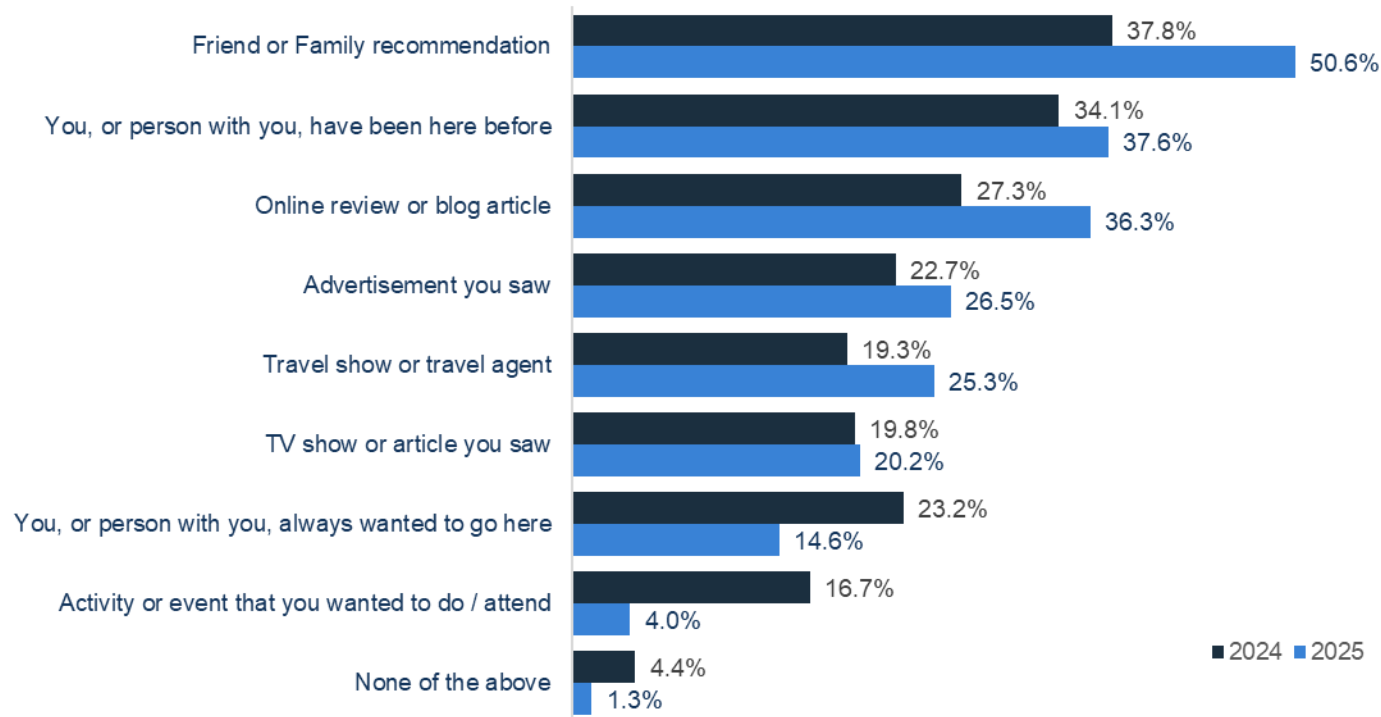
Q: Which ONE of your experiences BEST describes why you decided to visit the Florida Keys?

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

Key Influencers for Visits to Islamorada

- Friend or family recommendation was the main influence for this return trip among Islamorada visitors, with a higher share of respondents indicating that was the reason for their visit (+12.8 points). On the other hand, visitors who always wanted to visit the Keys and visitors who had activities or events they wanted to do in the Keys both declined, falling 8.6 and 12.7 points, respectively.

Key Influencer in Visiting the Florida Keys

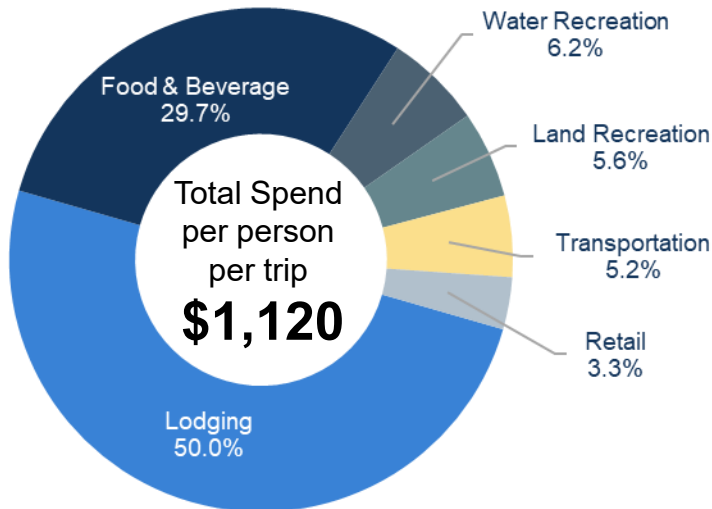


Q: Which of the following influenced you to first think Florida Keys? (Select all that apply)

Islamorada Visitor Spending

- Overall spending in 2025 averaged \$1,120 per person per trip; a decrease of \$11 from 2024.
- Lodging comprised 50% of visitor spending in 2025 with an average of \$560 per person per trip—up \$68 compared to 2024. Visitors spent an average of \$332 per person per trip on food and beverage. Transportation accounted for 5% of visitor spending with an average of \$58 per person per trip. Water recreation accounted for over 6% of travel costs and land recreation accounted for over 5%. Shopping (retail spend) made up over 3% of visitor spending at \$37 per person per trip.

Average Spent Per Person Per Trip



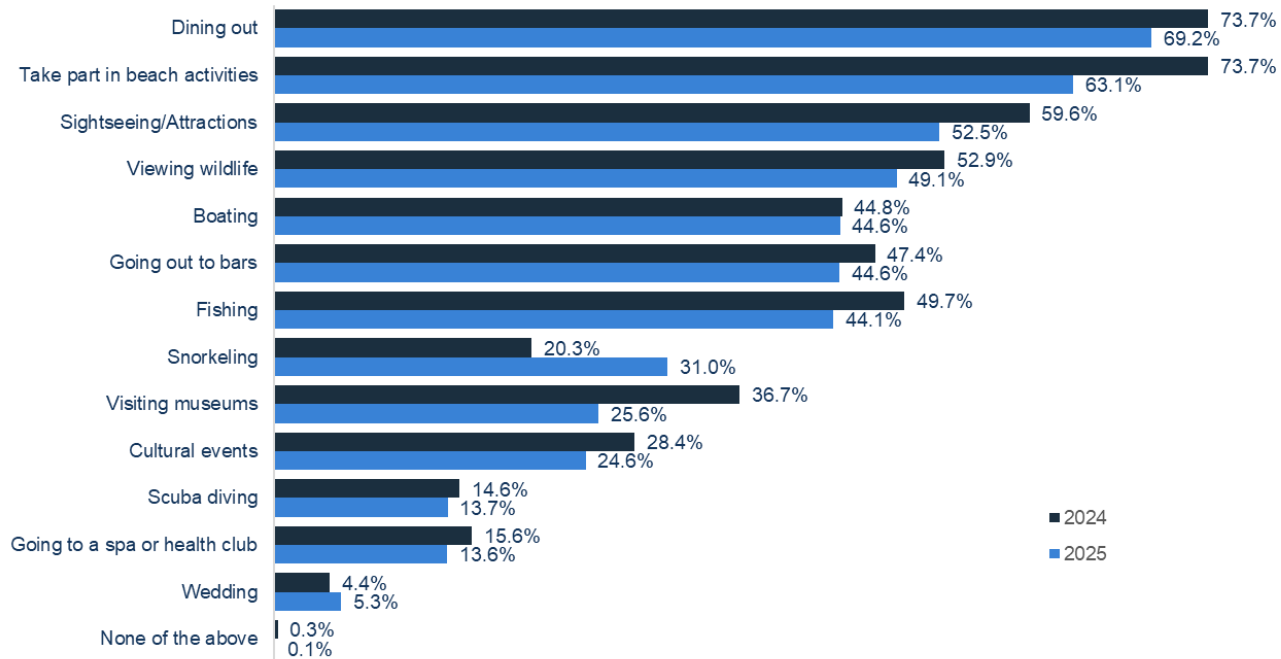
Spending Category	Average per person per trip		
	2024	2025	\$ +/-
Lodging	\$492	\$560	\$68
Food & Beverage	\$372	\$332	-\$40
Water Recreation	\$70	\$69	\$0
Land Recreation	\$59	\$62	\$4
Transportation	\$90	\$58	-\$32
Retail	\$49	\$37	-\$11
Total	\$1,131	\$1,120	-\$11

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

Islamorada Visitor Activity Participation

- Sixty-nine percent of 2025 Islamorada visitors dined out during their trip to the Keys, and 63% went to take part in beach activities, followed by 52% who went sightseeing or to attractions. The activities that gained the most popularity in 2025 were snorkeling (+10.7 points to 31%) and going to weddings (+0.9 points to 5%), while visiting museums and going to the beach both declined, down 10.6 points and 11.1 points, respectively.

Activities That Travel Party Members Participated In

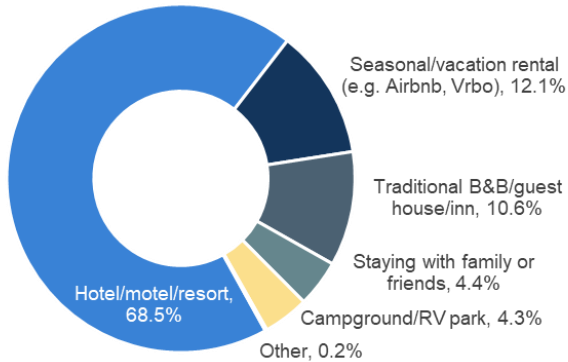


Q: While visiting the Florida Keys or Islamorada, have you or anyone from your group gone: (Select all that apply)

Visitor Accommodations and Reservations

- Most Islamorada visitors (68.5%) stayed in a hotel, motel, or resort in 2025—increasing 8.3 points year-over-year. Seasonal/vacation rentals accounted for 12% of stays (-3.7 points), while staying in traditional bed and breakfasts made up 10.6% of accommodations; unchanged from 2024.
- In 2025, 36.7% made their reservation online through a travel site (Expedia, Travelocity, etc.)—down almost 18 points—while another 25.8% made their reservation online through the property’s website (up over 11 points). More visitors in 2025 used a travel agent to reserve their accommodations (15.5%; up almost 9 points).

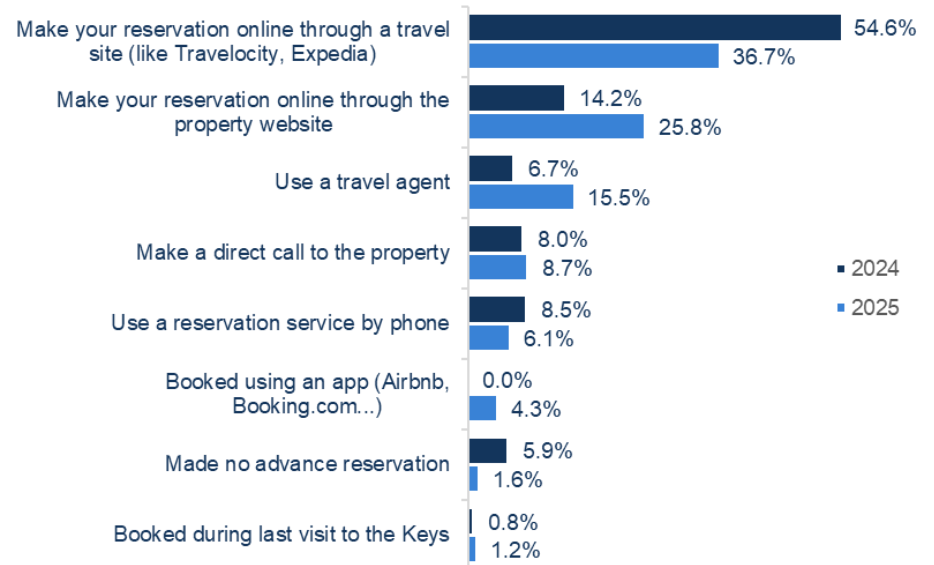
Primary Accommodations in the Keys



Accommodations During Visit	2024	2025	% +/-
Hotel/motel/resort	60.2%	68.5%	8.3%
Seasonal/vacation rental (e.g. Airbnb, Vrbo)	15.8%	12.1%	-3.7%
Traditional B&B/guest house/inn	10.6%	10.6%	0.0%
Staying with family or friends	7.2%	4.4%	-2.8%
Campground/RV park	5.7%	4.3%	-1.4%
Other	0.5%	0.2%	-0.3%

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

Method of Accommodation Reservation



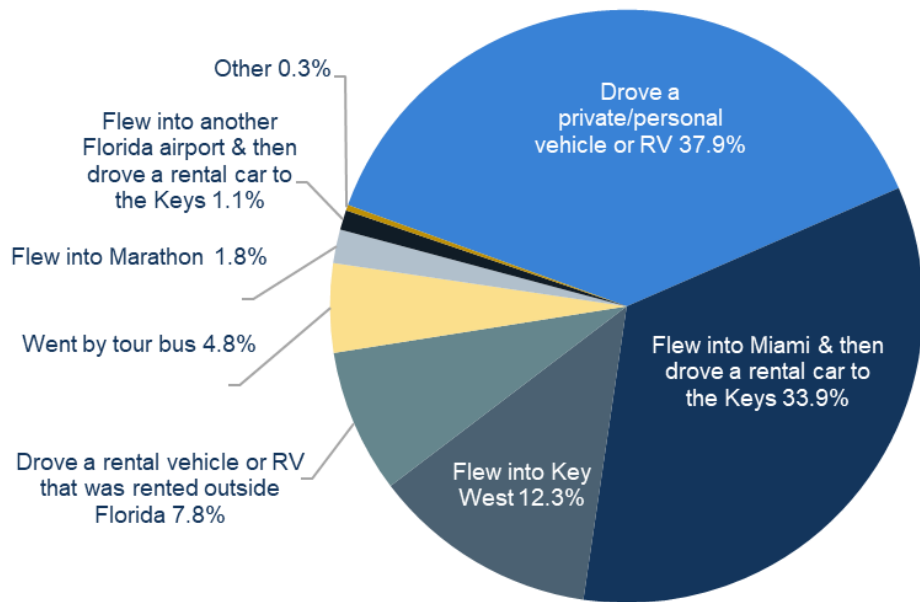
Q: When making your reservations for your accommodations, did you...

Islamorada Visitor Transportation to the Keys

- In 2025, use of a personal vehicle or RV was still the most common mode of transportation (38%), increasing 3.2 points compared to 2024. The mode of transportation with the largest increase in 2025 was flying into Miami then driving a rental car to the Keys (up 8.2 points), while the largest decrease in mode of transportation to Islamorada was in visitors who flew into Key West, which went down 9 points.

Primary Mode of Transportation	2024	2025	% +/-
Drove a private/personal vehicle or RV	34.7%	37.9%	3.2%
Flew into Miami & then drove a rental car to the Keys	25.7%	33.9%	8.2%
Flew into Key West	21.3%	12.3%	-9.0%
Drove a rental vehicle or RV that was rented outside Florida	9.8%	7.8%	-2.0%
Went by tour bus	5.7%	4.8%	-0.9%
Flew into Marathon	1.5%	1.8%	0.3%
Flew into another Florida airport & then drove a rental car to the Keys	1.3%	1.1%	-0.2%

Primary Mode of Transportation to the Keys

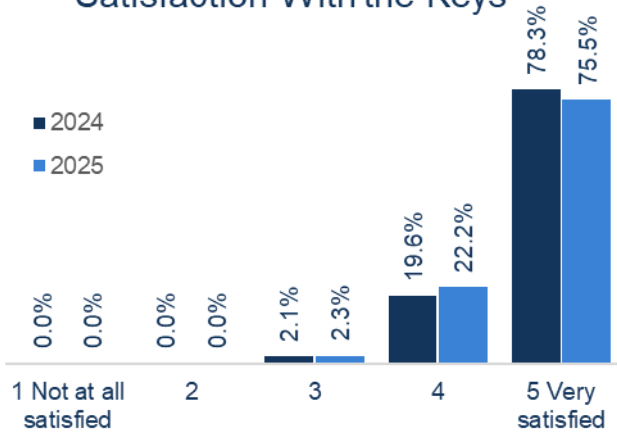


Q: How did you get to the Florida Keys on your trip?

Satisfaction With the Keys and Recommendations to Visit the Keys

- The 2025 average Islamorada visitor satisfaction rating of the Florida Keys was 4.7 out of 5—marginally lower than the previous year. Approximately 22% rated satisfaction with the Keys 4 out of 5, and another 76% were very satisfied (5/5)—down 2.8 points from 2024. Over 2% were neutral regarding their satisfaction (3).
- The average rating of those who would recommend the Keys to a friend or family member was 9.1 out of 10, which is only slightly lower than the 2024 rating of 9.2. Almost 75% 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 70, which is a bit lower than last year, meaning visitors in 2025 were somewhat less likely to recommend the Keys.

Satisfaction With the Keys

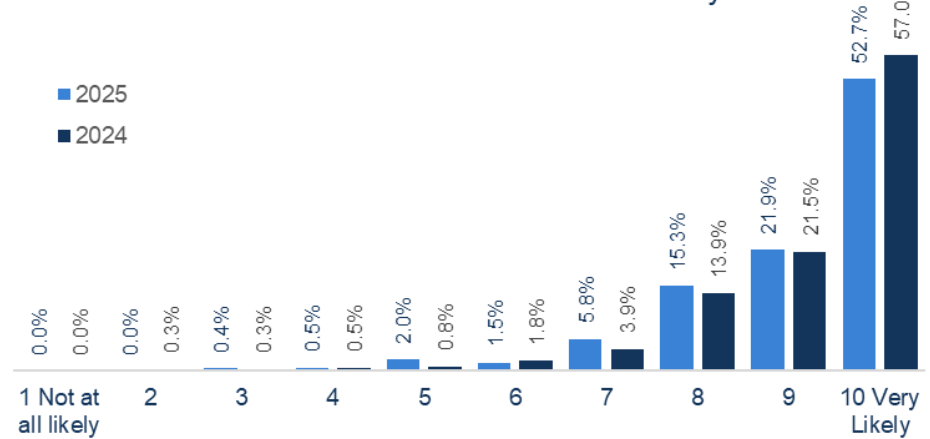


Average Satisfaction

2024: 4.8
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?

Likelihood to Recommend the Keys



Average = 9.1

NPS Score

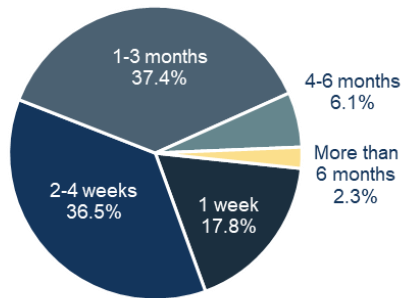
2024: 74.8
2025: 70.1

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 Islamorada visitors most commonly (32%) made their decision 1-3 months in advance. Visitors who planned their visit one week in advance increased over 8 points, while those who planned their visit over six months in advance decreased over 16 points.
- Slightly fewer visitors to Islamorada looked for special deals when booking their trip (63%, a decrease of over 8 points from 2024).
- The most common tool used to plan the trip remained online review sites (62%; up 10.7 points), followed by social internet sites (59%; up 10 points), and the Florida Keys website (37%; up half-a-point).

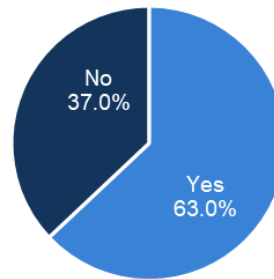
Timing of Decision to Visit



Timing of Decision	2024	2025	% +/-
1 week	9.6%	17.8%	8.2%
2-4 weeks	29.4%	36.5%	7.1%
1-3 months	32.2%	37.4%	5.2%
4-6 months	10.1%	6.1%	-4.0%
More than 6 months	18.7%	2.3%	-16.4%

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

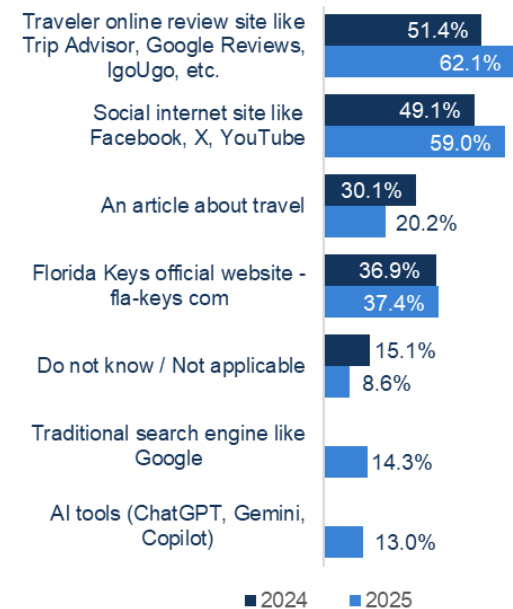
Looked for Special Deals



Looked for Deals	2024	2025	% +/-
Yes	71.4%	63.0%	-8.4%
No	28.6%	37.0%	8.4%

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

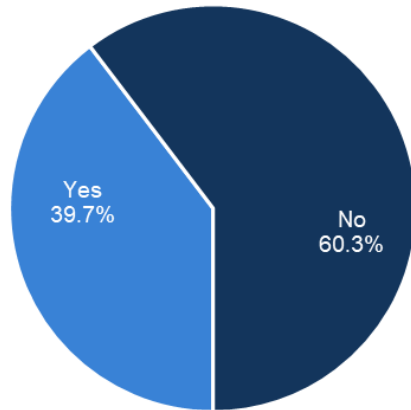


Q: Did you use any of the following internet tools to plan your trip?

Advertising

- In 2025, many fewer visitors had seen or heard advertising for the Florida Keys or Islamorada in the past three months, going from 51% in 2024 to 40% in 2025.
- Of these 40% who had seen or heard advertising, 66% saw advertisements on TV, followed by the internet or email newsletters (51.5%). The biggest increase was in respondents who had seen newspaper ads (+9 points), while radio advertisement awareness dropped 6 points in 2025.

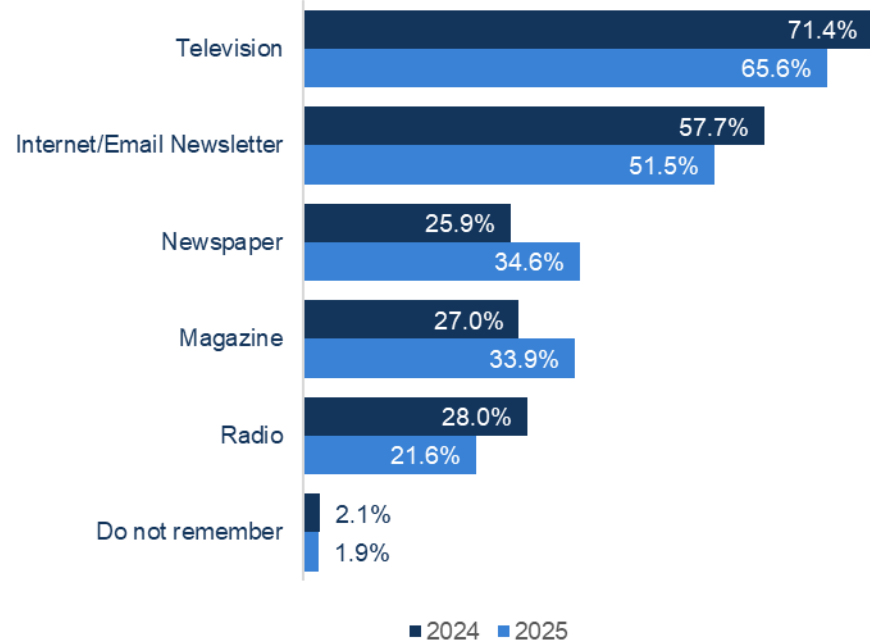
Recently Seen or Heard Advertising



Seen or Heard Advertising	2024	2025	% +/-
Yes	49.2%	39.7%	-9.5%
No	50.8%	60.3%	9.5%

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

Where Respondents Saw Advertising

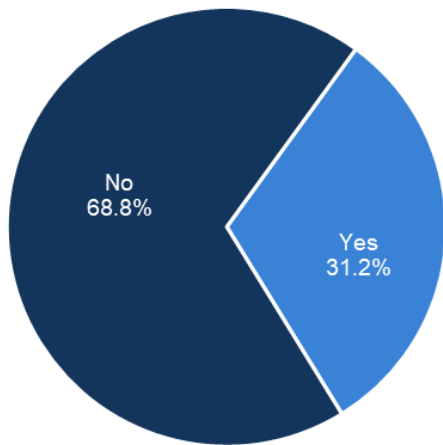


Q: Where did you see advertising for the Florida Keys and/or Islamorada?

Visited Other Areas in Florida

- Thirty-one percent of Islamorada visitors went to other places in Florida during their trip.

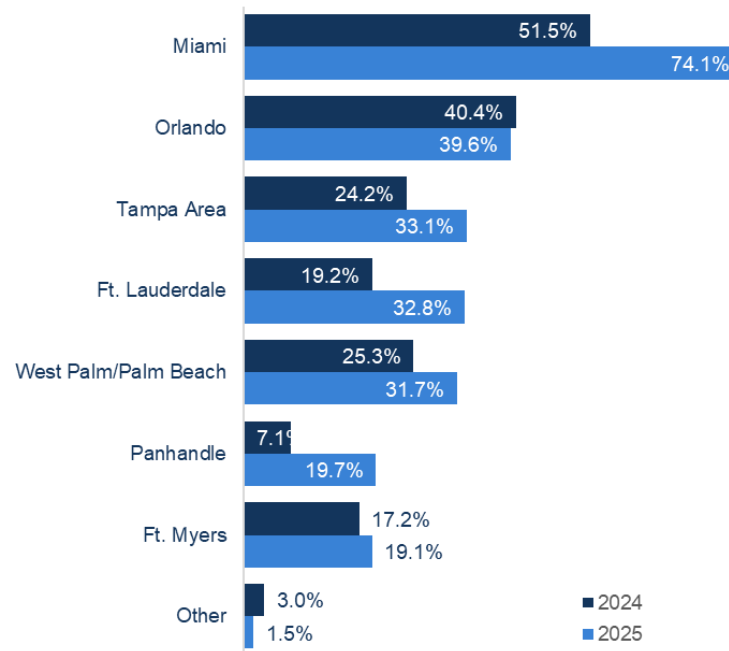
Visited Elsewhere in Florida



Seen or Heard Advertising	2024	2025	% +/-
Yes	26.1%	31.2%	5.1%
No	73.9%	68.8%	-5.1%

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

Visited Other Places in Florida

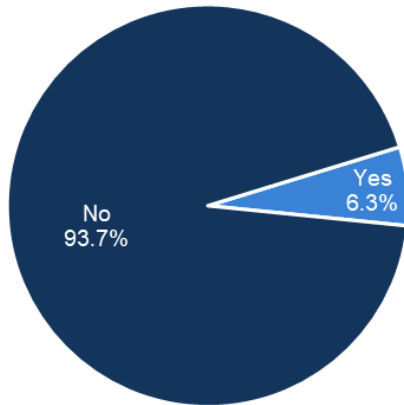


Q: Where else in Florida did you visit besides the Keys?

Own Property Elsewhere in Florida

- Over six percent of Islamorada visitors owned a second home in Florida.
- The respondents who owned a second home in the Keys most cited Orlando (56%), West Palm/Palm Beach (48%), and Miami (47%) as the location of their vacation properties.

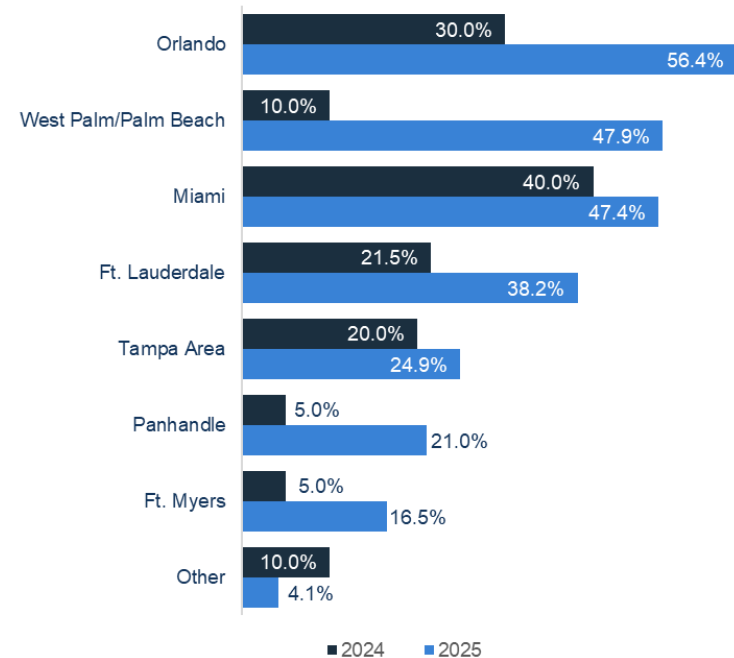
Second Home or Vacation Property in Florida



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

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

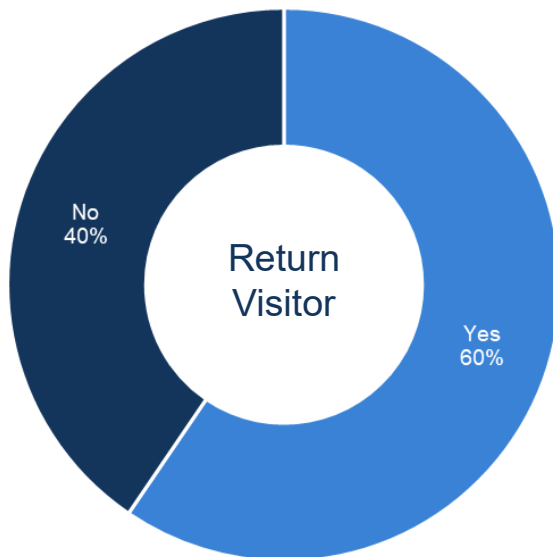
Second Home or Vacation Property Located in Florida



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

Return Visitation of Islamorada Visitors to the Florida Keys

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



Visited in Past 3 Years	2024	2025	% +/-
Yes	62.0%	59.5%	-2.5%
No	38.0%	40.5%	2.5%

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.

Rockport Core Competencies Include:



**Economic Impact
Assessment**



**Marketing
Analytics**



**Consumer
Insight &
Intelligence**



**Survey Research &
Analytics**



**Market Modeling &
Decision Support**



**Market &
Industry
Forecasts**



**Project & Event
Feasibility**



**Data Synthesis &
Research Partner
Collaborations**