



ROCKPORT
ANALYTICS

KEY LARGO 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 (629 Total)

Month	Key Largo
January	55
February	52
March	50
April	52
May	51
June	41
July	67
August	10
September	94
October	41
November	59
December	57

2025 Key Largo Visitor Highlights

Visitor profile and trip behavior

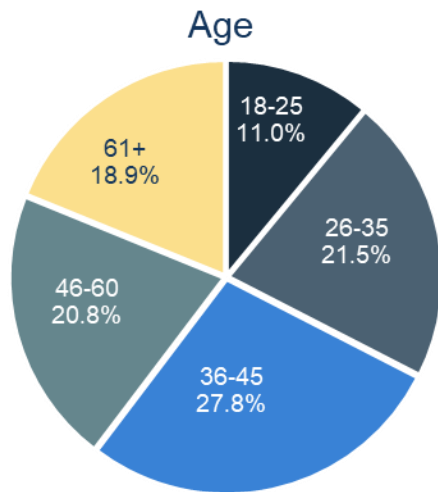
- Millennials increased from 33% to 39% of visitors in 2025, while Gen Z grew 3 points to 11%. Baby Boomers and Gen X each declined 4 points. The average visitor age ticked up slightly to 43.8, with the 36–45 age group now the largest at 28%.
- Males jumped 14.3 points to 60% of visitors in 2025. In 2024, females held a 54% majority — one of the sharpest gender reversals across all Keys districts.
- US-based visitors rose nearly 15 points to 96.6%, while all international visitors collapsed from 15% to just 2.2%. Texas surged 3 points to become the second-largest out-of-state source at 8.8%.
- African American visitors grew 5.6 points to 20% of Key Largo visitors — the largest ethnic shift year-over-year. Average household income rose over \$7,000 to \$113,602.
- The share of visitors who did not travel with children fell 5.7 points to 61%, indicating more family travel. Group-of-three travel grew 9 points to 27%. Average party size increased slightly to 3.1.
- The share of visitors staying 1–3 nights climbed another 4.5 points to 89.3%, while average length of stay slipped to 2.0 nights from 2.1 nights.

Spend, satisfaction, and marketing outcomes

- Total per-person spending dropped 18% to \$979 in 2025. Lodging fell 21% to \$472 and food and beverage dropped 21% to \$286. Transportation declined 25% to \$61. Water recreation (up 8.5% to \$61) and land recreation (up 16% to \$57) were the only categories to grow.
- Relaxing and escaping reclaimed its spot as the top visit motivator in 2025, rising 10.6 points to 51% of visitors.
- Visitors planning more than 6 months out fell 17.9 points to just 3.2%. The 1–3 month window grew 11.8 points to 40%, and the 2–4 week window rose 7.5 points.
- Friend or family recommendation rose nearly 12 points to 47.7% as the top visit influencer. Travel agent usage climbed 8 points to 14% as a reservation method.
- Only 24% of Key Largo visitors explored other parts of Florida — down 12 points from 36% in 2024. Repeat visitation dipped, with past-3-year visitors falling 4.8 points to 52%.
- NPS rose to 73.7 in 2025, up from 70.7 in 2024. Satisfaction held steady at 4.8/5, with 79% very satisfied. Advertising awareness declined slightly to 41% of visitors, down 2.9 points.

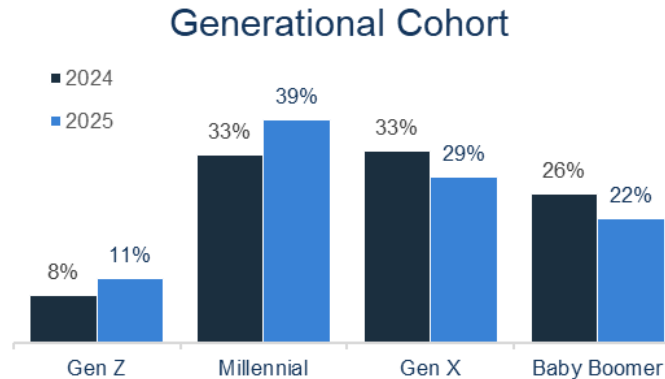
Visitor Demographics: Age, Generational Cohort, and Gender

- The average age of Key Largo visitors in 2025 was 43.8, increasing 1.7 years compared to 2024. Over a quarter (28%) of travelers were in the 36-45 age group. Ages 26-35 and those 46-60 and over each accounted for over one fifth (22% and 21%, respectively) while 19% were over age 61. Eleven percent were aged 18-25.
- Millennials travelers rose from 33% of travelers in 2024 to 39% in 2025, while Gen Z travelers increased 3 points to 11%. On the other hand, Gen X and Baby Boomer visitor shares both declined—each decreasing four points.
- The gender mix shifted in 2025 from a slight female majority to just over 60% male visitors.

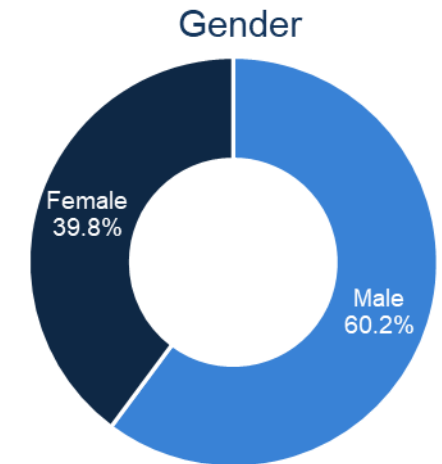


Average Age
2024: 42.1 years
2025: 43.8 years

Q: What is your age?



Q: What is your age?



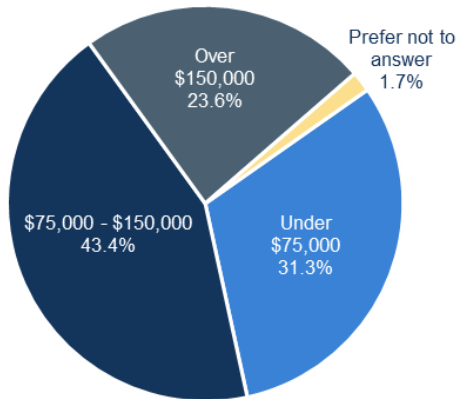
Gender	2024	2025	% +/-
Male	45.9%	60.2%	14.3%
Female	54.0%	39.8%	-14.2%

Q: What is your gender?

Visitor Demographics: Income, Ethnicity and Sexual Orientation

- The average household income increased over \$7K from 2024 and now sits at \$113,602. Most travelers who responded to the question were in the \$75k to \$150k income bracket (43%).
- Most visitors to Key Largo in 2025 identified themselves as Non-Hispanic White (69%)—decreasing 8 points from the previous year—while African American travelers had the biggest increase (5.6 points), making up 20% of visitors.
- Almost 93% of visitors were straight/heterosexual. Gay/Homosexual travelers accounted for over 1% of 2025 visitors, bisexuals represented over 4%, and lesbians made up slightly over 1% of Key Largo visitors.

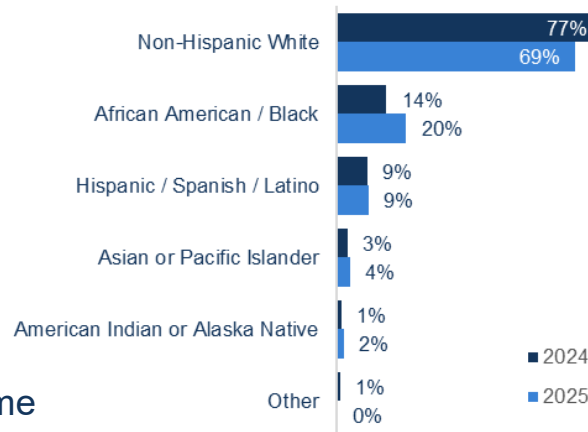
Household Income



Average Household Income
2024: \$105,764
2025: \$113,602

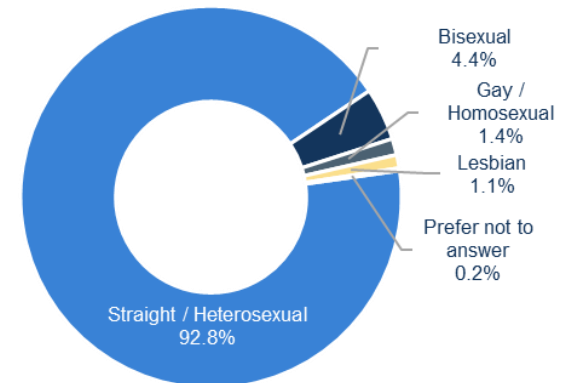
Q: What is the total annual income of your household?

Ethnicity



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

Sexual Orientation



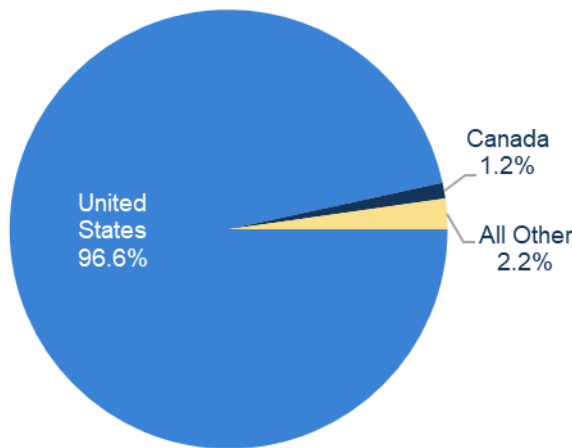
Sexual Orientation	2024	2025	% +/-
Straight / Heterosexual	92.0%	92.8%	0.8%
Bisexual	3.3%	4.4%	1.1%
Gay / Homosexual	2.8%	1.4%	-1.4%
Lesbian	1.5%	1.1%	-0.4%
Prefer not to answer	0.4%	0.2%	-0.2%

Q: Orientation?

Origin of Key Largo Visitors

- US-based Key Largo visits increased considerably (almost 15 points) to 96.6%, while international visits declined.
- Of the visitors from the U.S., close to 17% came from within Florida. Texas (8.8%), New York (7.2%), and California (7.1%) accounted for the top states of origin for Key Largo visitors. There was an increase of 3 points in visits from Texas, as well as an increase of 2 points in visits from Delaware. The states that decreased the most were Ohio (-3 points) and Connecticut (-1.3 points).

Visitor Origin



Country of Origin	2024	2025	% +/-
United States	81.9%	96.6%	14.7%
Canada	3.1%	1.2%	-1.9%
All Other	15.0%	2.2%	-12.8%

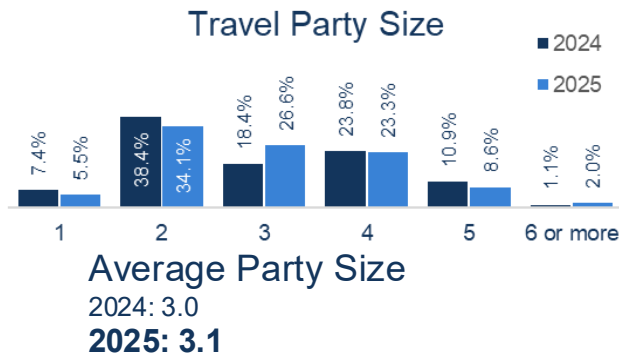
State of Origin	Percent	
	2024	2025
Florida	16.1%	16.8%
Texas	5.5%	8.8%
New York	7.3%	7.2%
California	6.6%	7.1%
Georgia	5.5%	5.4%
North Carolina	2.7%	4.5%
Pennsylvania	4.8%	4.2%
Michigan	4.8%	3.9%
Illinois	4.2%	3.6%
Virginia	3.1%	2.5%

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

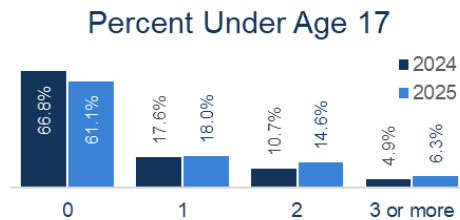
All other states were <3.0% each
Q: Where in the U.S. do you live?

Travel Party Size and Travel Companions

- The average travel party size of Key Largo visitors was 3.1—a slight increase of 0.1 over 2024. Those traveling in groups of three increased the most from 2024 (18%) to 2025 (27%)
- Around 61% of 2025 visitors did not travel with children, which is a 5.7 percentage point decline from 2024.
- Almost 69% traveled with a spouse, partner, girlfriend, or boyfriend, which is 4 points lower than the previous year.

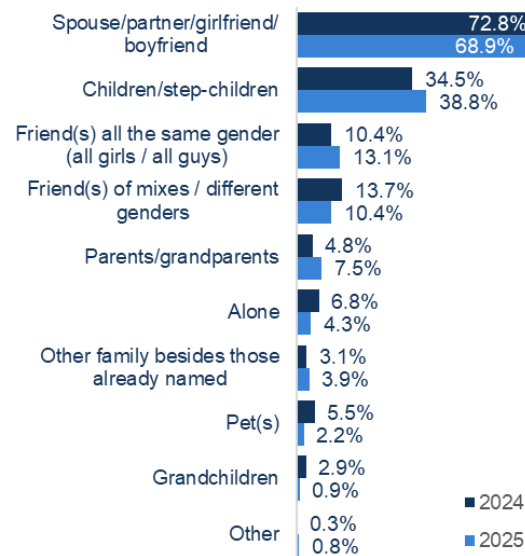


Q: Including yourself, how many people are in your travel party?



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

Travel Companions



39.2% were traveling as a party of 2 in 2025

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

Visitors' Length of Stay in Key Largo

- The average length of stay for 2025 Key Largo visitors was 2 nights, a slight decline of 0.2 nights from 2024. Key Largo visitors mostly stayed 1-3 nights (89.3%), a 4.5 point increase from last year.



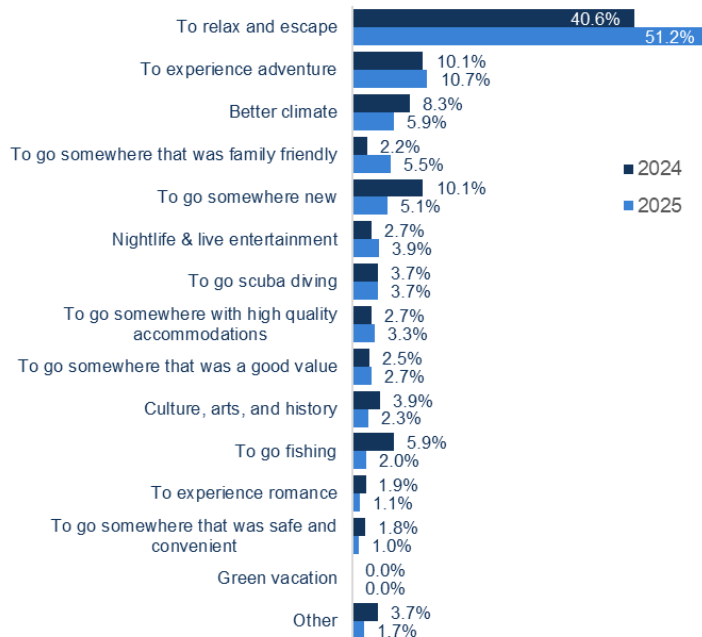
Length of Stay in Key Largo		
	2024	2025
1-3 nights	84.8%	89.3%
4-7 nights	13.2%	9.8%
8 or more nights	2.0%	0.9%
Average	2.2	2.0



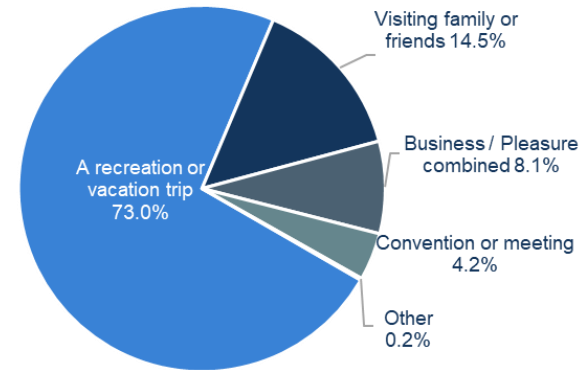
Primary Reasons and Experiences That Drive Visitors to the Keys

- Most Key Largo visitors came to the Keys to relax and escape (51%), up 10.6 points in 2025. Adventure-seeking travelers followed at 10.7%, rising only 0.6 points from 2024. The biggest drop was “going somewhere new,” which fell five points.
- When asked about the primary purpose for the visit to the Keys, 73% of Key Largo visitors indicated it was a recreation or vacation trip. This was a decrease of 8 points compared to 2024, while 15% indicated their trip purpose was to visit family or friends—an increase of over 3 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	81.2%	73.0%	-8.2%
Visiting family or friends	11.3%	14.5%	3.2%
Business / Pleasure combined	6.0%	8.1%	2.1%
Convention or meeting	1.2%	4.2%	3.0%
Other	0.3%	0.2%	-0.1%

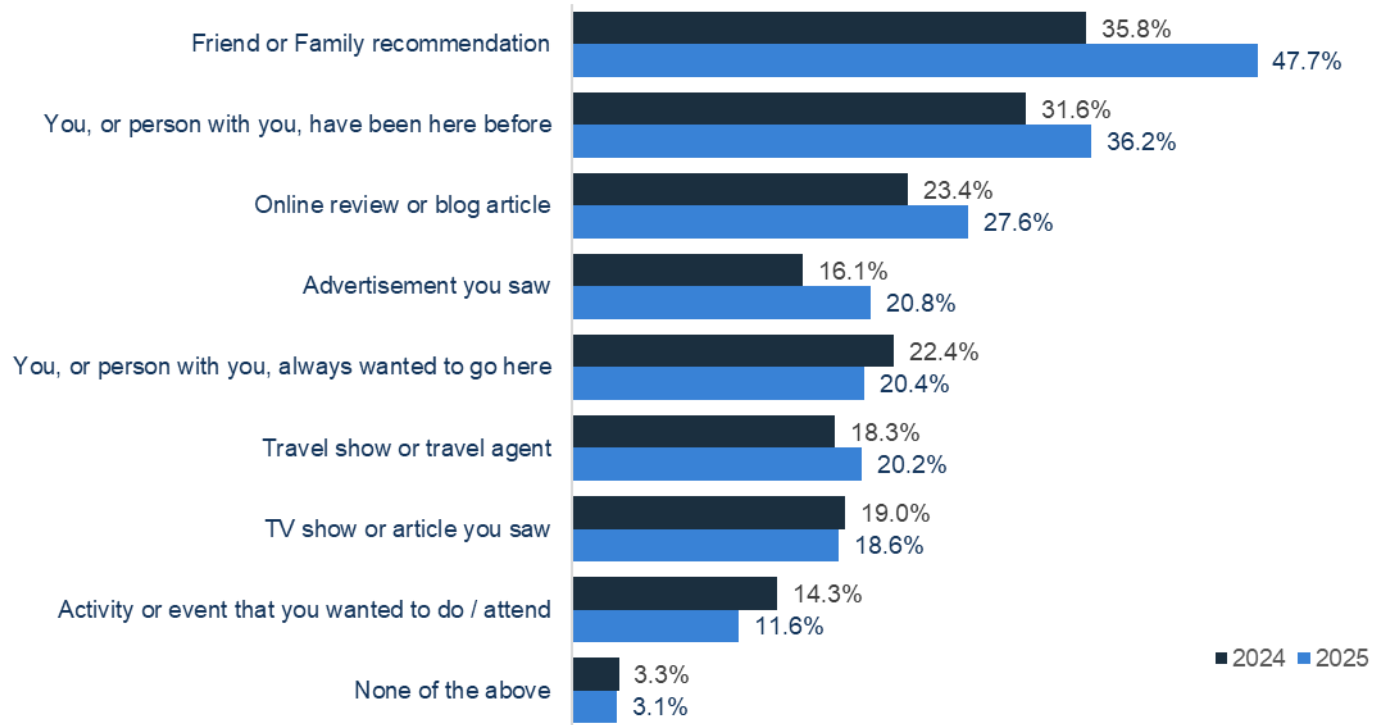
Q: Which ONE of your experiences BEST describes why you decided to visit the Florida Keys?

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

Key Influencers for Visits to Key Largo

- Friend or family recommendation—along with having visited before—was the top influencer for visiting Key Largo, rising nearly 12 points from 35.8% to 47.7%. Visitors in 2025 were less influenced by activities they wanted to do (-2.7 points) and by “always wanting to go there” (-2 points).

Key Influencer in Visiting the Florida Keys

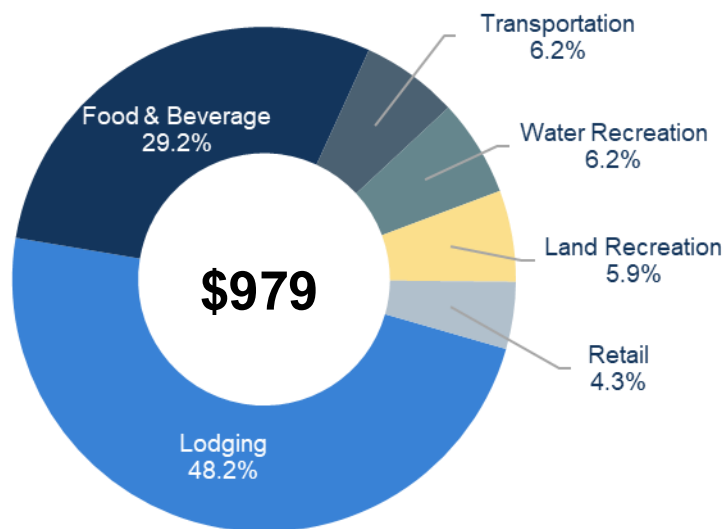


Q: Which of the following influenced you to first think Florida Keys? (Select all that apply)

Key Largo Visitor Spending

- Overall 2025 spending averaged \$979 per person per trip, a decrease of 18% compared to 2024.
- Per-trip spending averaged \$216 less in 2025. Lodging accounted for the biggest dollar change (-\$125), and transportation saw the largest percentage decline (-25%). In contrast, water recreation and land recreation edged upward, adding \$5 and \$8, respectively.

Average Spent Per Person Per Trip



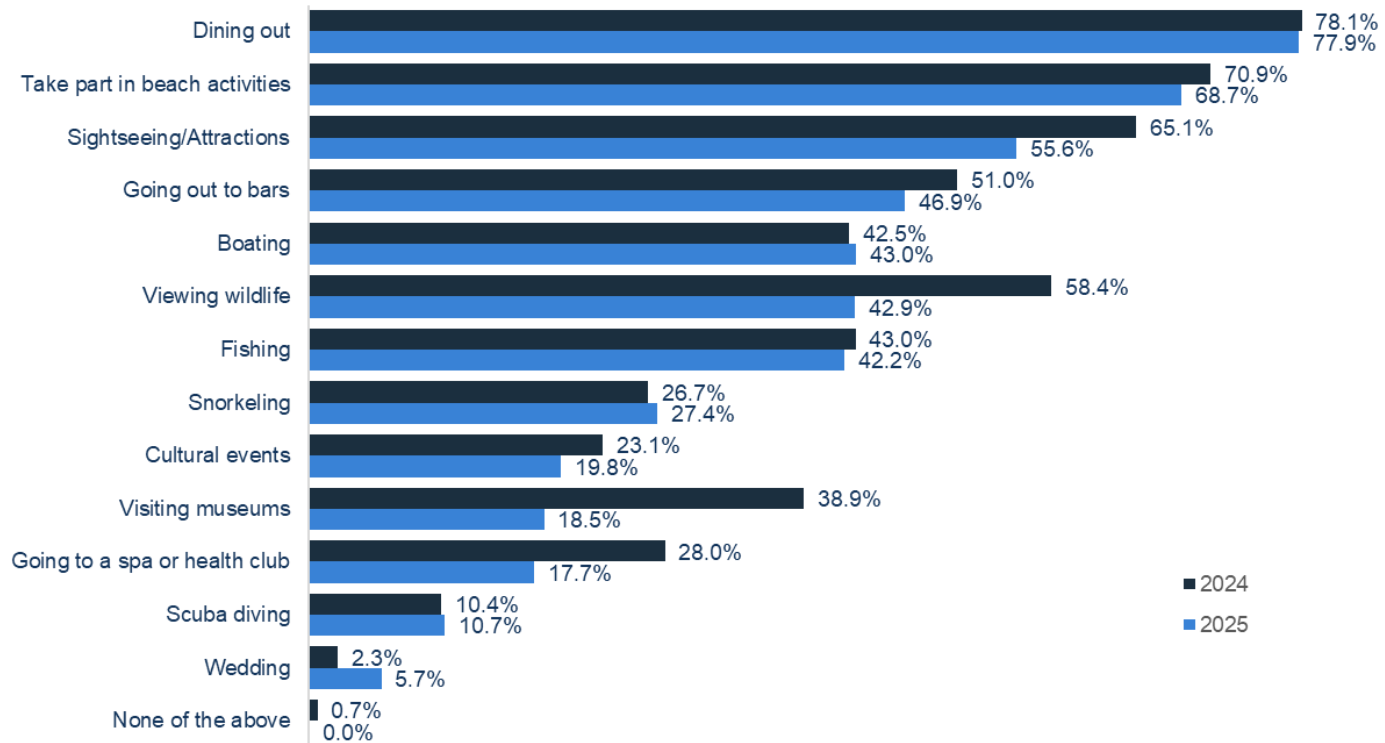
Spending Category	Average per person per trip		
	2024	2025	\$ +/-
Lodging	\$597	\$472	-\$125
Food & Beverage	\$360	\$286	-\$74
Transportation	\$82	\$61	-\$21
Water Recreation	\$56	\$61	\$5
Land Recreation	\$49	\$57	\$8
Retail	\$52	\$42	-\$10
Total	\$1,195	\$979	-\$216

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

Key Largo Visitor Activity Participation

- The activities Key Largo visitors engaged in during their 2025 visit mainly included dining out (77.9%), outdoor activities such as going to the beach (68.7%), and sightseeing (55.6%).
- Key Largo visitors in 2025 were more likely to attend weddings (+3 points), and go snorkeling (+0.7 points), and they were less likely to visit museums (-20 points), and to view wildlife (-16 points).

Activities That Travel Party Members Participated In

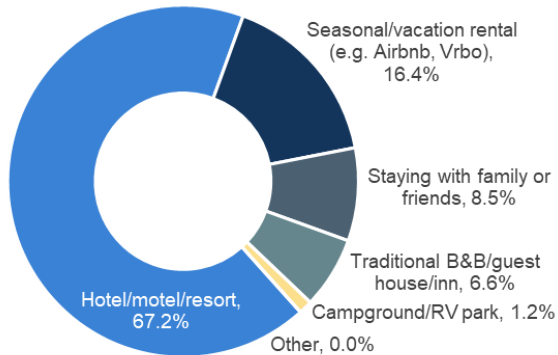


Q: While visiting the Florida Keys or Key Largo, have you or anyone from your group gone: (Select all that apply)

Visitor Accommodations and Reservations

- Most visitors (67%) stayed in a hotel, motel, or resort in 2025—up 2.9 points from last year. Use of traditional bed and breakfasts declined the most (-2.6 points).
- In 2025, reservations made online through a travel site (Expedia, Travelocity, etc.) were still the most common method (43%) but many visitors opted to use a travel agent to arrange their accommodation (13.9%, for an increase of 8 points), as well as using the property’s website (19%, for an increase of 2.1 points).

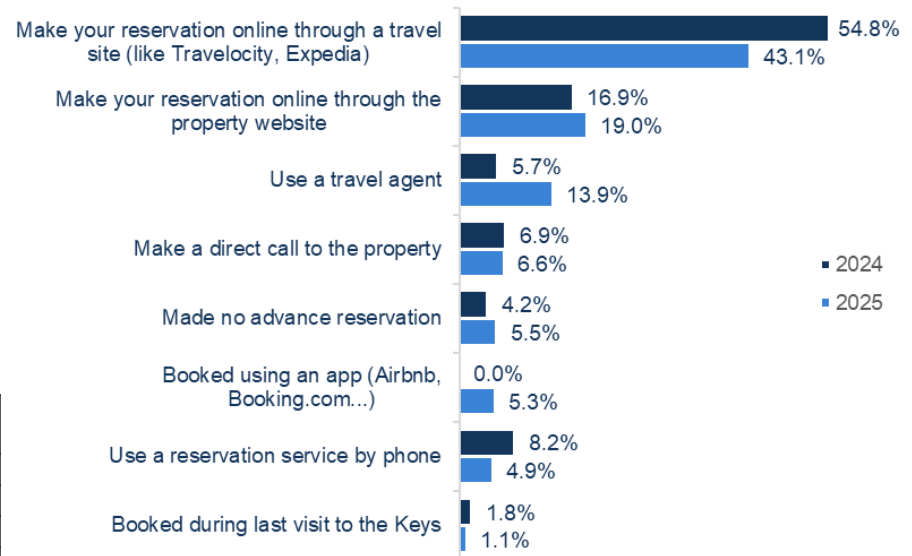
Primary Accommodations in the Keys



Accommodations During Visit	2024	2025	% +/-
Hotel/motel/resort	64.3%	67.2%	2.9%
Seasonal/vacation rental (e.g. Airbnb, Vrbo)	16.6%	16.4%	-0.2%
Staying with family or friends	5.9%	8.5%	2.6%
Traditional B&B/guest house/inn	9.2%	6.6%	-2.6%
Campground/RV park	3.6%	1.2%	-2.4%
Other	0.4%	0.0%	-0.4%

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

Method of Accommodation Reservation



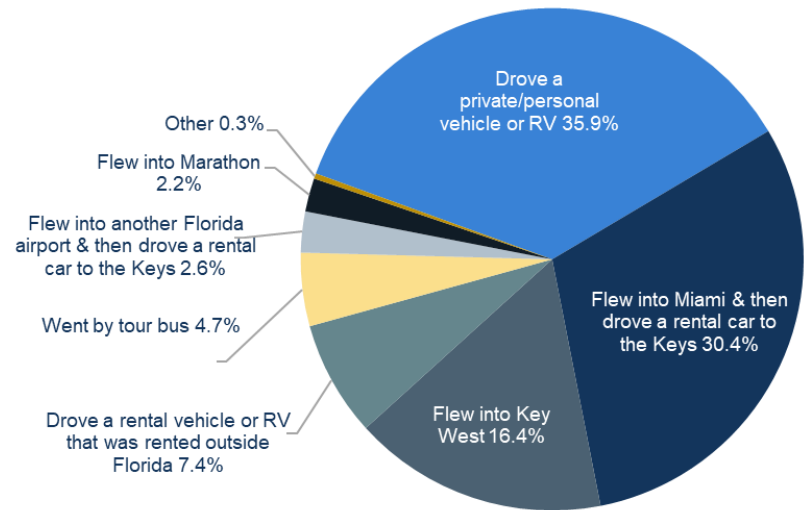
Q: When making your reservations for your accommodations, did you...

Key Largo Visitor Transportation to the Keys

- In 2025, use of a personal vehicle or RV was still the most common mode of transportation (37%), increasing over 8 points compared to 2024, making it the mode of transportation with the largest increase in 2025. The largest decrease in mode of transportation to Key Largo was in visitors who flew into Key West, which went down 4.2 points.

Primary Mode of Transportation	2024	2025	% +/-
Drove a private/personal vehicle or RV	27.4%	35.9%	8.5%
Flew into Miami & then drove a rental car to the Keys	28.9%	30.4%	1.5%
Flew into Key West	20.6%	16.4%	-4.2%
Drove a rental vehicle or RV that was rented outside Florida	8.2%	7.4%	-0.8%
Went by tour bus	7.6%	4.7%	-2.9%
Flew into another Florida airport & then drove a rental car to the Keys	2.9%	2.6%	-0.3%
Flew into Marathon	3.7%	2.2%	-1.5%
Other	0.7%	0.3%	-0.4%

Primary Mode of Transportation to the Keys

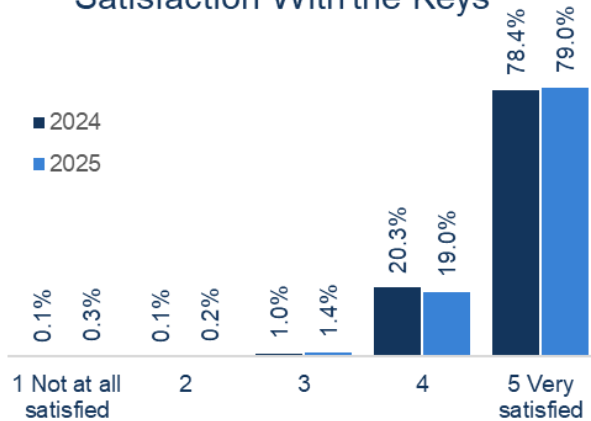


Q: How did you get to the Florida Keys on your trip?

Satisfaction With the Keys and Recommendations to Visit the Keys

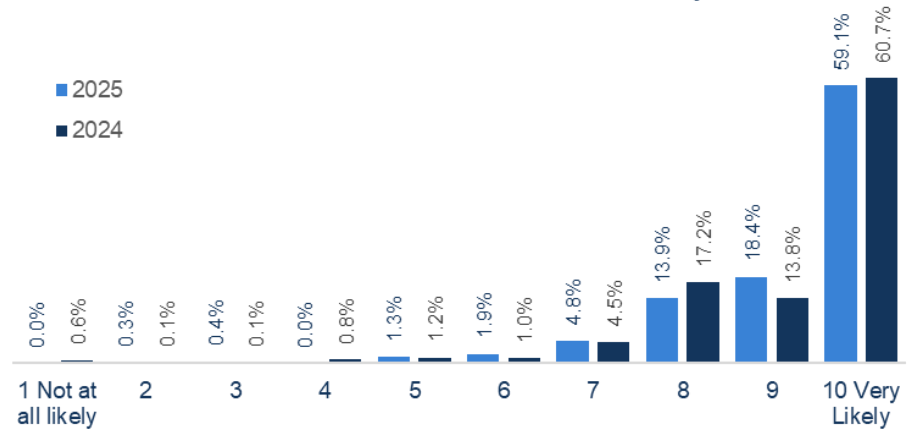
- The 2025 average Key Largo visitor satisfaction rating was 4.8 out of 5—remaining the same as the previous year. Nineteen percent rated satisfaction 4 out of 5, and another 79% were very satisfied (5/5)—up over 11 points from 2024. A little over 1% were neutral regarding their satisfaction (3)
- The 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 9.3. Almost 78% 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 73.7, which is considerably higher than last year, meaning visitors in 2025 were much more likely to recommend the Keys.

Satisfaction With the Keys



Average Satisfaction
2024: 4.8
2025: 4.8

Likelihood to Recommend the Keys



Average = 9.2

NPS Score
2024: 70.7
2025: 73.7

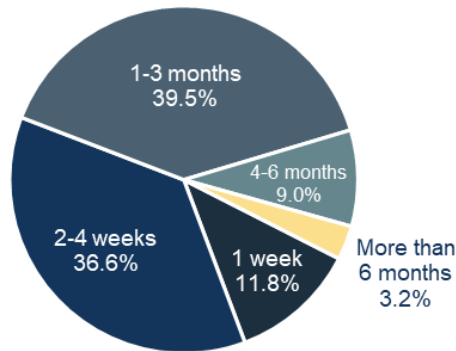
Q: On a scale of 1-5, where 1 is "Not at all satisfied" and 5 is "Very Satisfied", how satisfied were you with your most recent visit to the Keys?

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

- The most common timing of decision (39.5%) to visit Key Largo was 1-3 months, a percentage point increase of almost 12 points from 2024. The largest decrease (17.9 points) was in visitors who made a decision 6 or more months in advance.
- Almost 66% looked for a special deal when planning or booking their vacation, which was a 12 point increase from 2024.
- 2025 Key Largo visitors were much more likely to use internet tools when planning a trip. Traveler online review sites, and social internet sites both increased year-over-year, growing 12 points and 7 points, respectively.

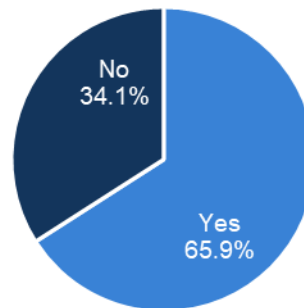
Timing of Decision to Visit



Timing of Decision	2024	2025	% +/-
1 week	10.7%	11.8%	1.1%
2-4 weeks	29.1%	36.6%	7.5%
1-3 months	27.7%	39.5%	11.8%
4-6 months	11.4%	9.0%	-2.4%
More than 6 months	21.1%	3.2%	-17.9%

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

Looked for Special Deals

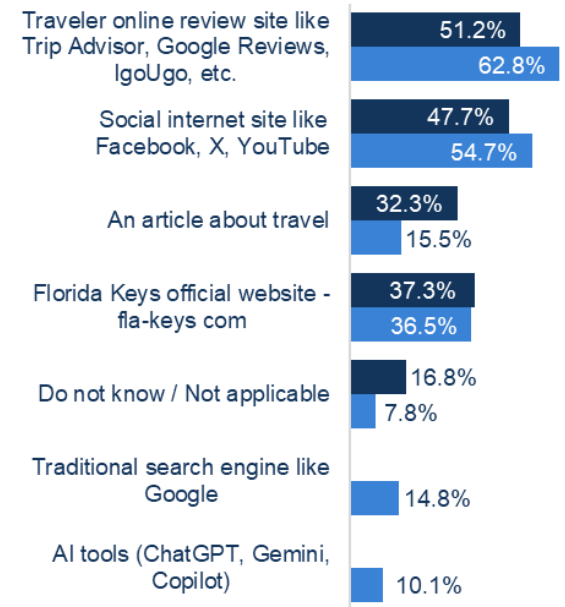


Looked for Deals	2024	2025	% +/-
Yes	53.8%	65.9%	12.1%
No	46.2%	34.1%	-12.1%

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?

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

Internet Tools Used to Plan Trip

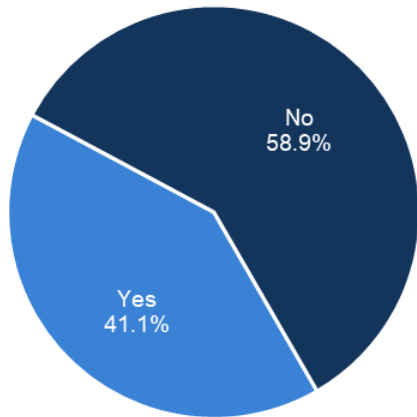


■ 2024 ■ 2025

Advertising

- In 2025, 41% of Key Largo visitors had seen or heard advertising for the Florida Keys or Key Largo in the past three months, a 2.9 percentage point increase from 2024.
- 2025 visitors were more likely to see advertising on the internet or email newsletters, and in the newspaper.

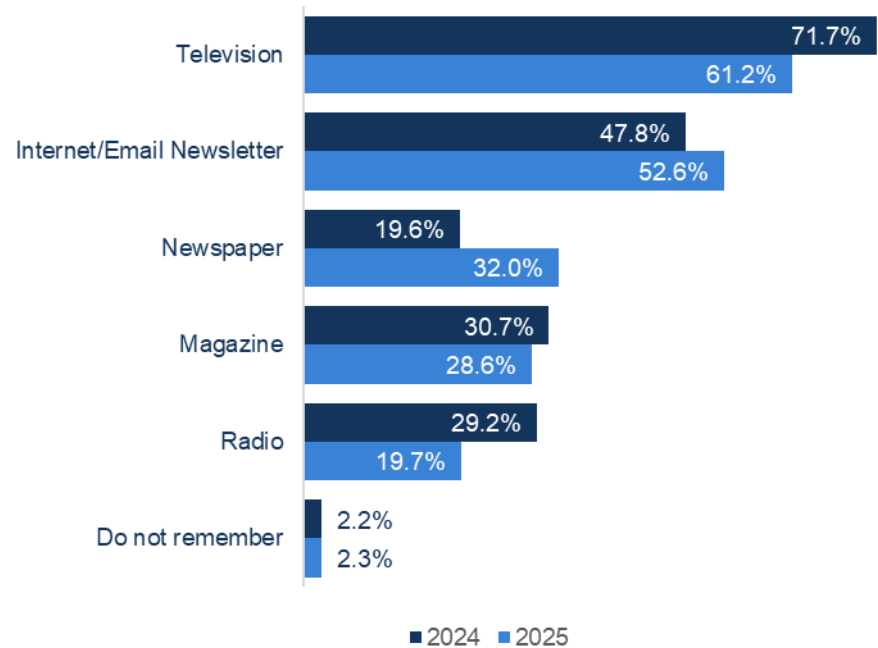
Recently Seen or Heard Advertising



Seen or Heard Advertising	2024	2025	% +/-
Yes	44.0%	41.1%	-2.9%
No	56.0%	58.9%	2.9%

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

Where Respondents Saw Advertising



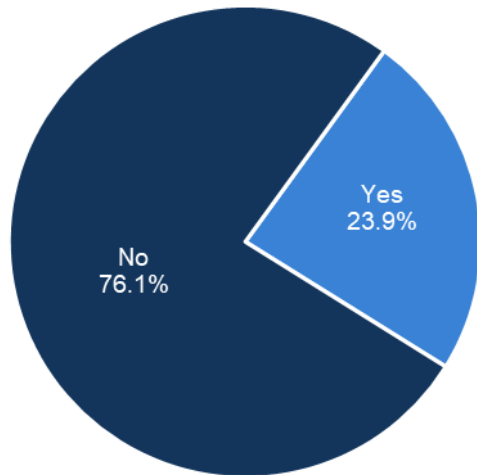
Question wording changed in Q4 2025; those results were excluded from year-over-year comparisons

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

Visited Other Areas in Florida

- 2025 visitors were less likely (-12 percentage points) to visit somewhere else in Florida during their trip to Key Largo.
- Of these 24% who visited elsewhere, 57% went to Miami, 46% visited Orlando, and 29% went to the Tampa Area.

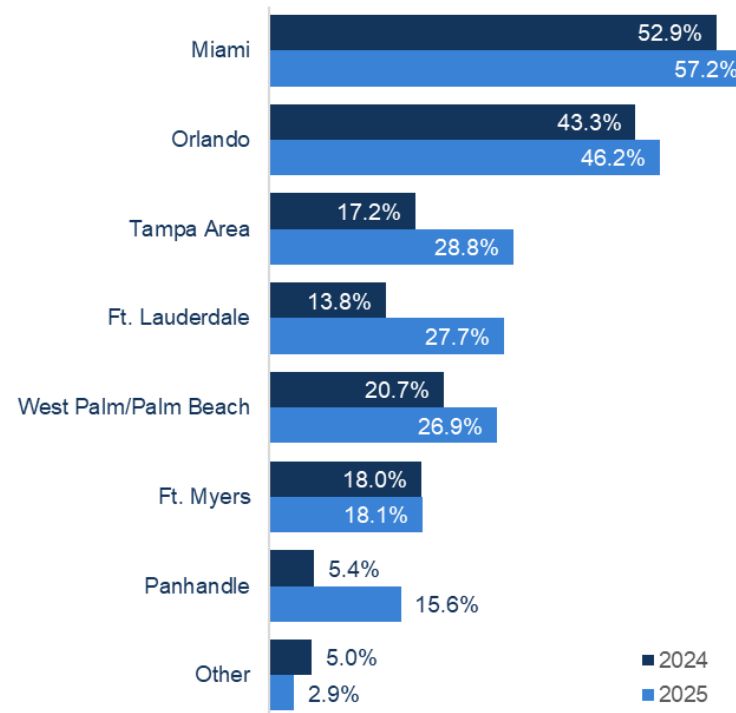
Visited Elsewhere in Florida



Visited Other Places	2024	2025	% +/-
Yes	35.9%	23.9%	-12.0%
No	64.1%	76.1%	12.0%

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

Visited Other Places in Florida

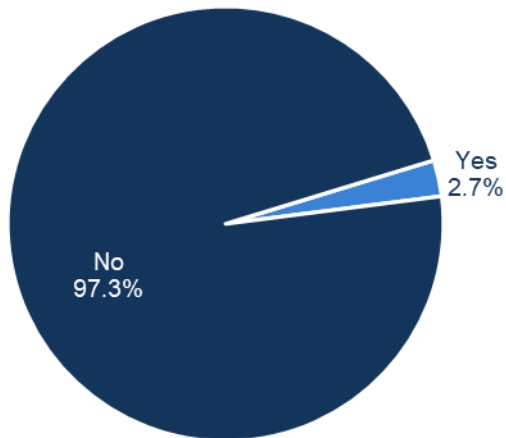


Q: Where else in Florida did you visit besides the Keys?

Own Property Elsewhere in Florida

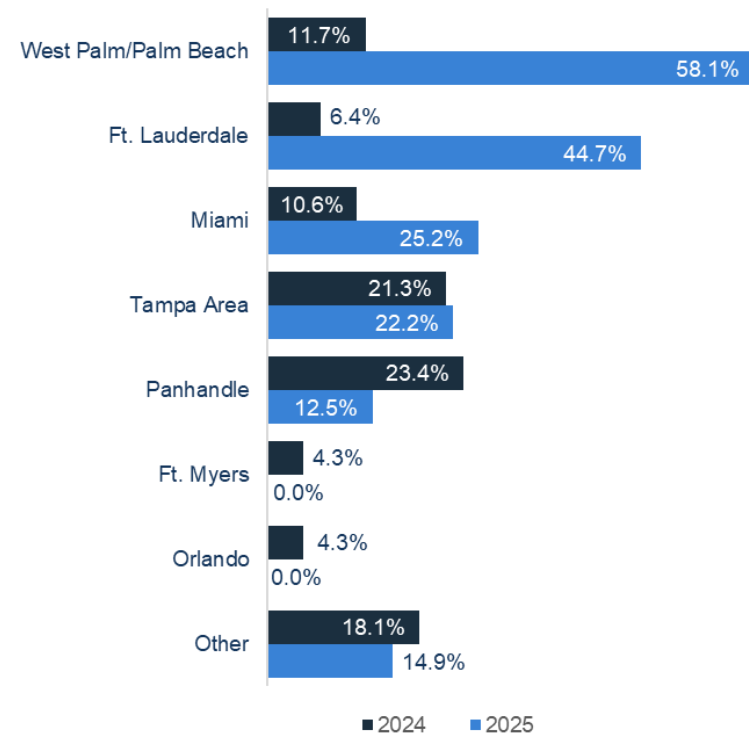
- Just under 3% of 2025 Key Largo visitors owned a second home or vacation property in Florida, which is 2.8 points less than 2024.
- Most respondents indicated their second home was in West Palm/Palm Beach (58%), Ft. Lauderdale (45%), and Miami (25%).

Second Home or Vacation Property in Florida



Own Second Home	2024	2025	% +/-
Yes	5.5%	2.7%	-2.8%
No	94.5%	97.3%	2.8%

Second Home or Vacation Property Located in Florida

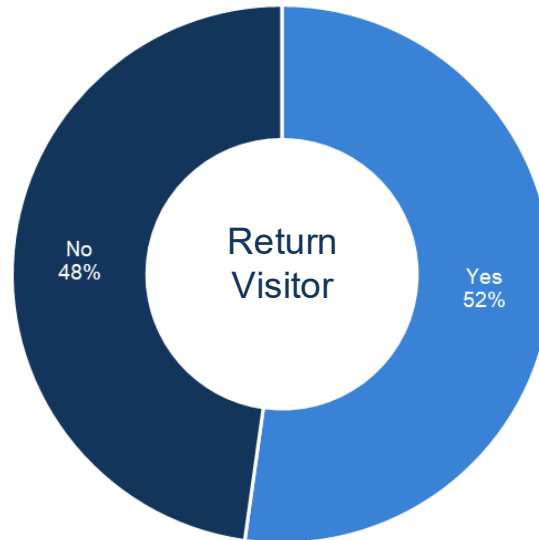


Q: Do you own a second home or vacation property in Florida?

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

Return Visitation of Key Largo Visitors to the Florida Keys

- 2025 visitors were 4.8 percentage points less likely to have visited Key Largo previously compared to 2024.



Visited in Past 3 Years	2024	2025	% +/-
Yes	57.0%	52.2%	-4.8%
No	43.0%	47.8%	4.8%

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) 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**