



ROCKPORT
ANALYTICS

MARATHON 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 (n=608 Total)

Month	Marathon
January	67
February	31
March	64
April	49
May	53
June	53
July	41
August	48
September	54
October	45
November	45
December	58

2025 Marathon Visitor Highlights

Visitor profile and trip behavior

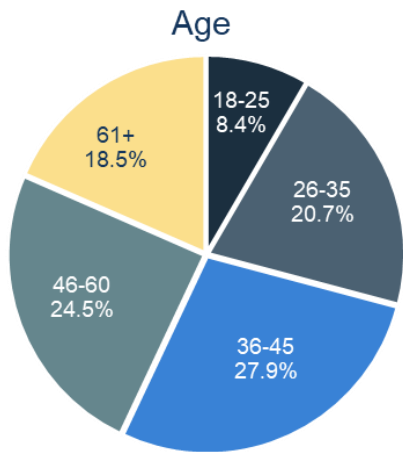
- The average visitor age dropped 2.8 years to 39.7 in 2025. Millennials climbed to 40% of visitors, up 4 points from 2024, while Gen Z grew to 9%. Baby Boomers declined to 21%, and females now make up 52.9% of visitors, up 3.9 points.
- The share of international visits to Marathon increased over 8 points in 2025, making up 21.9% of trips. Within the US, Florida in-state visitors surged to 27.8%, followed by Georgia (8.5%) and New York (8.1%).
- Average household income rose over \$23k to \$127,588 in 2025. Non-Hispanic White visitors declined to 68%, while Hispanic visitors held at 12%, and African American visitors grew to 16%.
- Average party size grew to 3.1 from 2.9 in 2024. Spouse/partner travel declined to 69.9% (down 3.3 points) and children/step-children travel held steady at 37.9%. The share not traveling with children dipped to 65.2%.
- The average length of stay held flat at 2.9 nights. Short stays (1-3 nights) rose to 76.1%, while 4-7 night stays fell to 21.7% and stays of 8 or more nights dropped to 2.1%.
- Relaxing and escaping declined to 40.2% as the top visit motivator, down 11.1 points. Recreation and vacation trips accounted for 78.0% of visits. Friend or family recommendation (37.3%) and past visitation (36.0%) remained the top influencers.

Spend, satisfaction, and marketing outcomes

- Average per-person spending fell to \$967 in 2025, down \$577 from \$1,543 in 2024. Lodging dropped from \$937 to \$459 (-\$478), due to an increase in stays with friends and family. Food and beverage declined to \$342 (-\$16), transportation to \$57 (-\$24), and water recreation to \$40 (-\$19).
- The 2025 average satisfaction score held at 4.8/5 and the NPS was 81.3, a modest decline from 84.4 in 2024. The likelihood-to-recommend average was 9.4 out of 10, with 74.2% of visitors rating their likelihood to recommend a 10.
- Hotel/motel/resort stays fell sharply to 60.6% in 2025 (down 12.5 points), while seasonal and vacation rentals grew to 19.0% (up 8.2 points) and staying with family or friends rose to 9.3%. Direct calls to the property jumped to 17.9% as a booking method.
- The 2-4 week planning window became the most common in 2025 at 29.1% (up 7.7 points), while visitors planning more than 6 months out increased to 20.8% (up 5.0 points). Deal-seekers fell to 48.4%, down 20.6 points from 69.0% in 2024.
- Advertising awareness ticked up slightly to 44.5% in 2025 (from 43.5% in 2024). Television remained the top channel at 60.4%, followed by internet/email newsletters at 53.0% and magazines at 33.6%.

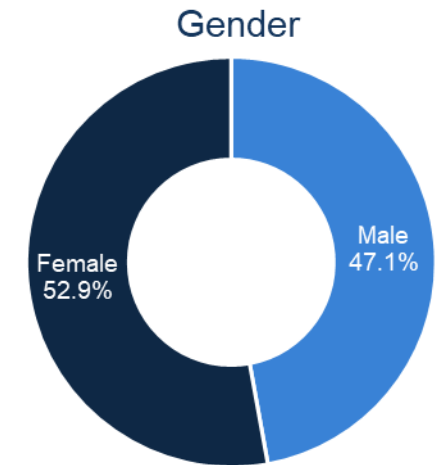
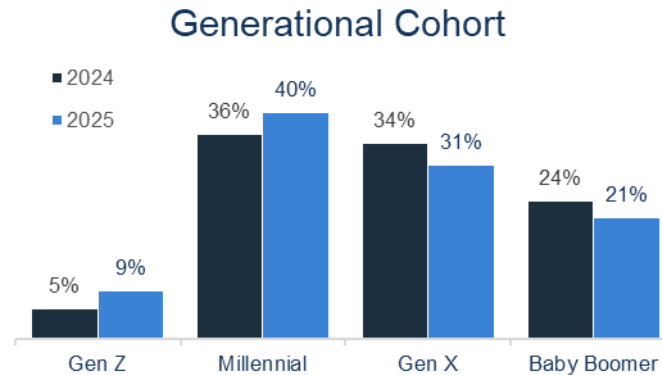
Visitor Demographics: Age, Generational Cohort, and Gender

- The average age of Marathon visitors in 2025 was 39.7, a decrease of 2.8 years from 42.5 in 2024. Millennials were the largest generational cohort at 40% of visitors—up 4 points—while Gen Z grew to 9%. Baby Boomers declined to 21%, and Gen X held at 31% of visitors.
- The gender mix shifted in 2025, with females comprising 52.9% of Marathon visitors, an increase of 3.9 points from 2024. Male visitors declined correspondingly to 47.1%.



Average Age
2024: 42.5 years
2025: 39.7 years

Q: What is your age?



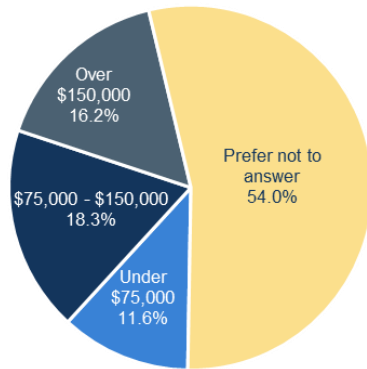
Gender	2024	2025	% +/-
Male	51.0%	47.1%	-3.9%
Female	49.0%	52.9%	3.9%

Q: What is your gender?

Visitor Demographics: Income, Ethnicity and Sexual Orientation

- Average household income rose over \$23,000 to \$127,588 in 2025, up from \$104,467 in 2024. Among those who reported their income, 18% were in the \$75,000-\$150,000 bracket and 16% reported incomes over \$150,000.
- In 2025, 68% of Marathon visitors were Non-Hispanic White, a decrease of 8 points from 2024. Hispanic visitors held at 12%, while African American visitors grew to 16%, up 4 points from 2024.
- In 2025, 87.3% of visitors identified as straight/heterosexual, a decrease of 6.2 points from 93.5% in 2024. Bisexual visitors rose to 6.5% (up 3.5 points), while Gay/Homosexual visitors increased to 2.8% and Lesbian visitors to 2.2%.

Household Income



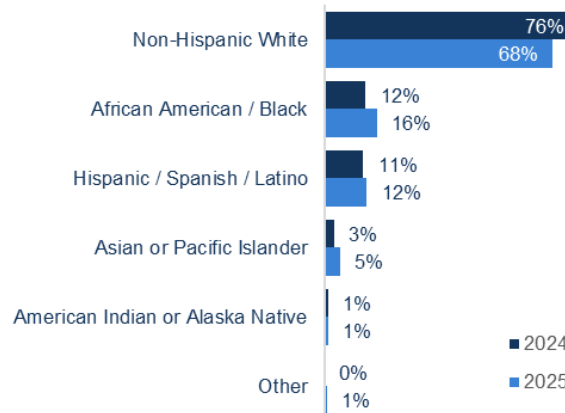
Average Household Income

2024: \$104,467

2025: \$127,588

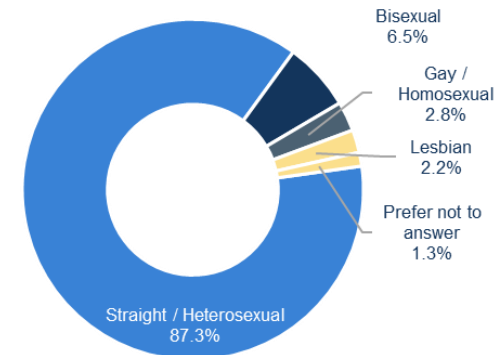
Q: What is the total annual income of your household?

Ethnicity



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

Sexual Orientation

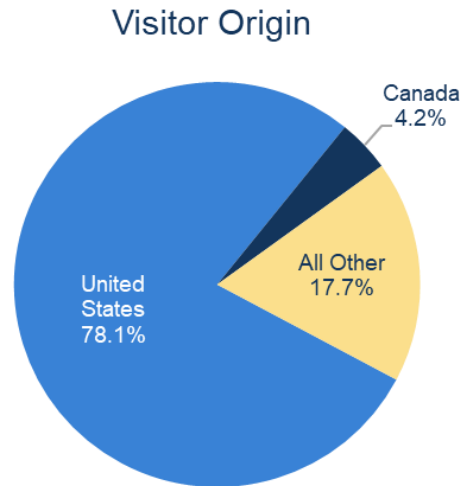


Sexual Orientation	2024	2025	% +/-
Straight / Heterosexual	93.5%	87.3%	-6.2%
Bisexual	3.0%	6.5%	3.5%
Gay / Homosexual	2.2%	2.8%	0.6%
Lesbian	1.0%	2.2%	1.2%
Prefer not to answer	0.3%	1.3%	1.0%

Q: Orientation?

Origin of Marathon Visitors

- In 2025, 78.1% of Marathon visitors were from the United States, a decline of 8.7 points from 86.8% in 2024. Canadian visitors grew to 4.2% (up 2.9 points), while all other international visitors rose to 17.7% of arrivals, an increase of 5.8 points.
- Of US visitors, 27.8% came from within Florida in 2025, an increase of 6.7 points from 2024. Georgia surged to 8.5% (up 4.4 points) and New York grew to 8.1% (up 1.1 points). The states with the largest year-over-year decreases were Texas (down 2.4 points), and Massachusetts (down 1.8 points).



Country of Origin	2024	2025	% +/-
United States	86.8%	78.1%	-8.7%
Canada	1.3%	4.2%	2.9%
All Other	11.9%	17.7%	5.8%

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

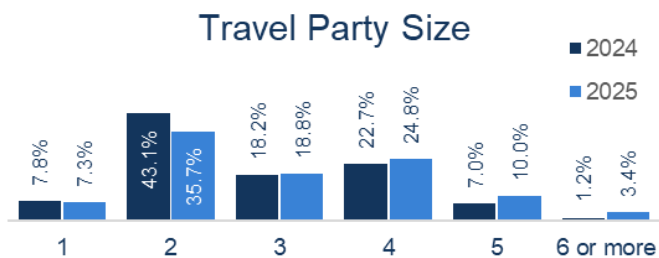
State of Origin	Percent	
	2024	2025
Florida	21.1%	27.8%
Georgia	4.1%	8.5%
New York	7.0%	8.1%
California	6.3%	7.5%
Illinois	3.6%	3.2%
Tennessee	3.8%	3.1%
North Carolina	2.5%	3.0%
Michigan	3.6%	2.8%
Ohio	4.4%	2.8%
Texas	5.1%	2.8%

All other states were <3% each

Q: Where in the U.S. do you live?

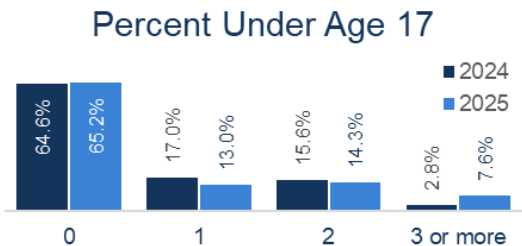
Travel Party Size and Travel Companions

- The average travel party size of Marathon visitors grew to 3.1 in 2025, up from 2.9 in 2024. Those traveling in pairs held at 35.7%, while groups of 4 grew to 24.8% (up 2.1 points) and groups of 5 grew to 10.0% (up 3.0 points).
- In 2025, 65.2% of travel parties did not include children under age 17, nearly unchanged from 2024. Those traveling with one minor fell to 13.0%, while those with two minors decreased to 14.3% and those with three or more minors grew to 7.6%.
- Nearly 70% of 2025 Marathon visitors traveled with a spouse or partner, decreasing over three points. Children/step-children remained the second most common travel companion at 37.9%, while friends of mixed genders grew to 11.6%.



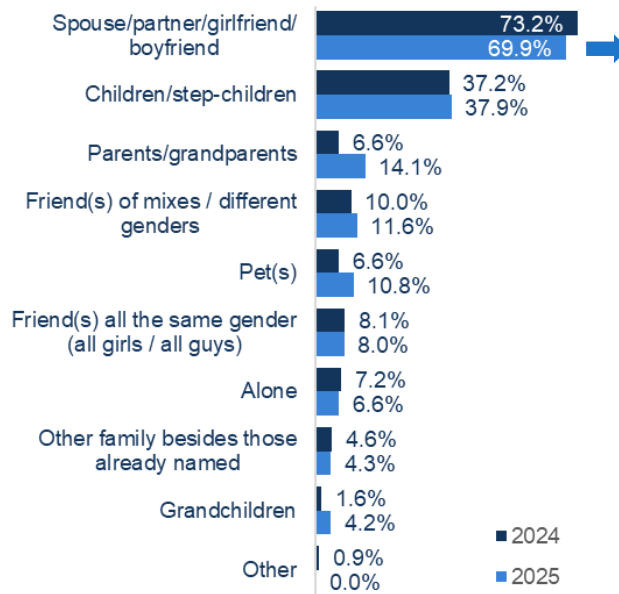
Average Party Size
2024: 2.9
2025: 3.1

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



44.3% were traveling as a party of 2 in 2025, compared to 49.8% in 2024.

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

Visitors' Length of Stay in Marathon

- The average length of stay for 2025 Marathon visitors remained at 2.9 nights. The share staying 1-3 nights rose to 76.1% (up 4.2 points from 71.9% in 2024), while 4-7 night stays declined to 21.7%, and stays of 8 or more nights fell to 2.1%.



Length of Stay in Marathon		
	2024	2025
1-3 nights	71.9%	76.1%
4-7 nights	24.0%	21.7%
8 or more nights	4.1%	2.1%
Average	2.9	2.9

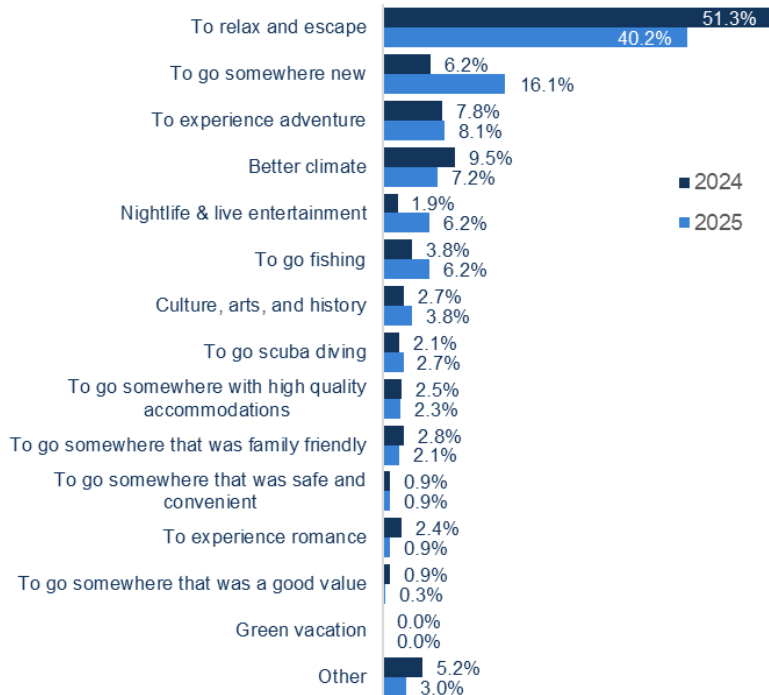
Q: How many nights will you stay in each of the Florida Keys?



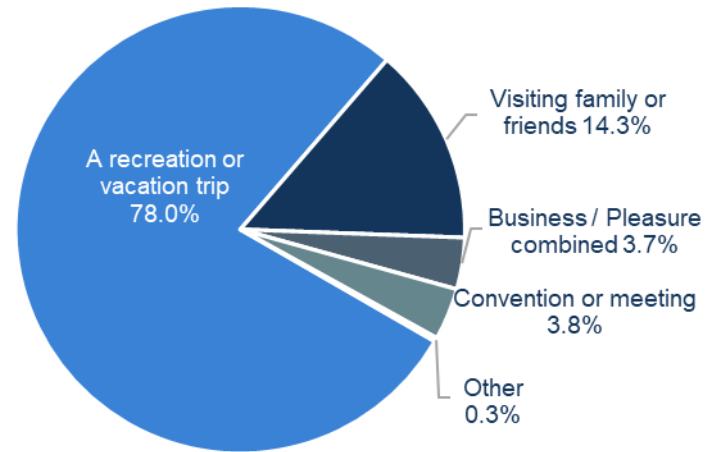
Primary Reasons and Experiences That Drive Visitors to the Keys

- In 2025, 40.2% of Marathon visitors traveled to the Keys primarily to relax and escape, a decrease of 11.1 points from 51.3% in 2024. Going somewhere new climbed to 16.1% (up 9.9 points), while better climate fell to 7.2% from its second-place position in 2024.
- In 2025, 78.0% of Marathon visitors indicated their primary visit purpose was a recreation or vacation trip, a decrease of 3.3 points from 81.3% in 2024. Visiting family or friends rose to 14.3% (up 1.5 points), while business and pleasure combined fell to 3.7%.

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	81.3%	78.0%	-3.3%
Visiting family or friends	12.8%	14.3%	1.5%
Convention or meeting	0.7%	3.8%	3.1%
Business / Pleasure combined	4.4%	3.7%	-0.7%
Other	0.7%	0.3%	-0.4%

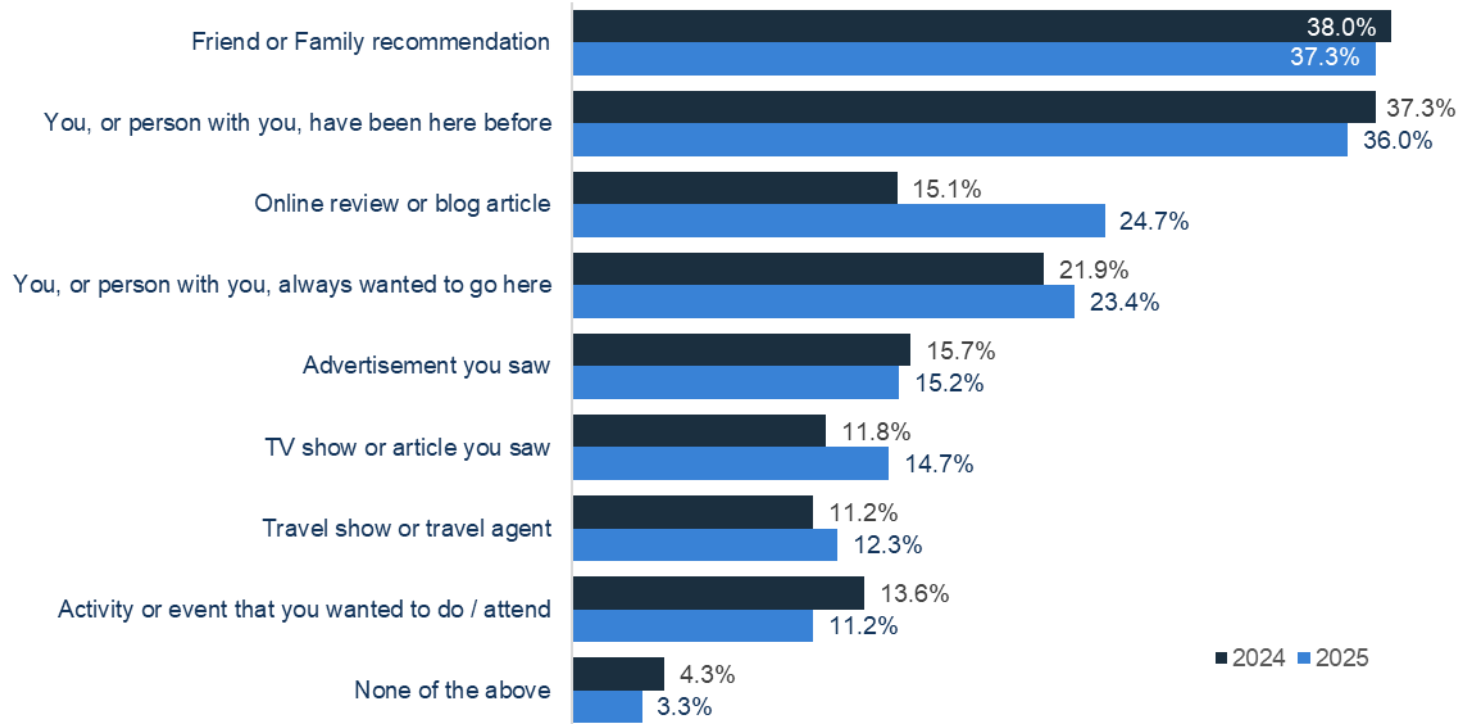
Q: Which ONE of your experiences BEST describes why you decided to visit the Florida Keys?

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

Key Influencers for Visits to Marathon

- In 2025, friend or family recommendation remained the top influencer at 37.3%, down slightly from 38.0% in 2024. Repeat visits (36%) as an influence also declined—down 1.3 points. Online reviews or blog articles surged to 24.7% (up 9.6 points), while always wanting to visit grew to 23.4% (up 1.5 points) and TV shows rose to 14.7% (up 2.9 points).

Key Influencer in Visiting the Florida Keys

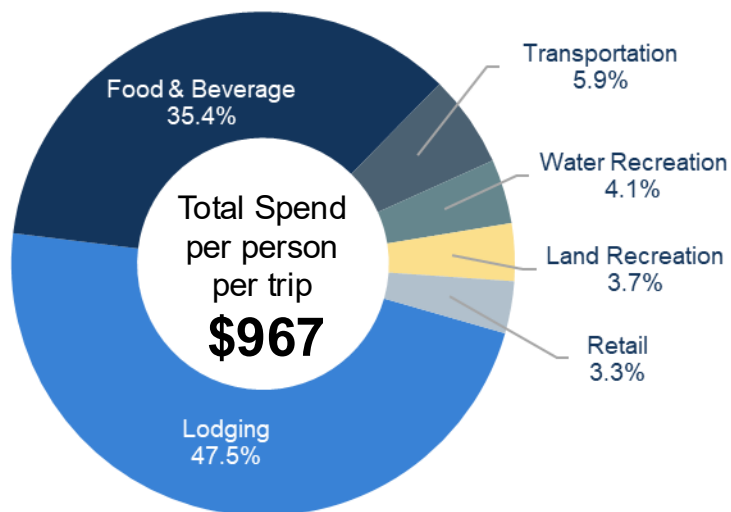


Q: Which of the following influenced you to first think Florida Keys? (Select all that apply)

Marathon Visitor Spending

- Overall 2025 spending averaged \$967 per person per trip, a decrease of \$577 from the \$1,543 recorded in 2024. The total represents a 37.4% decline year-over-year.
- Lodging saw the sharpest absolute decline, falling from \$937 in 2024 to \$459 in 2025, a drop of \$478. This is partly due to visitors reporting they stayed with friends or family. Food and beverage spending declined (-\$16) to \$342. Transportation fell \$24 to \$57, water recreation dropped \$19 to \$40, and land recreation and retail also declined.

Average Spent Per Person Per Trip



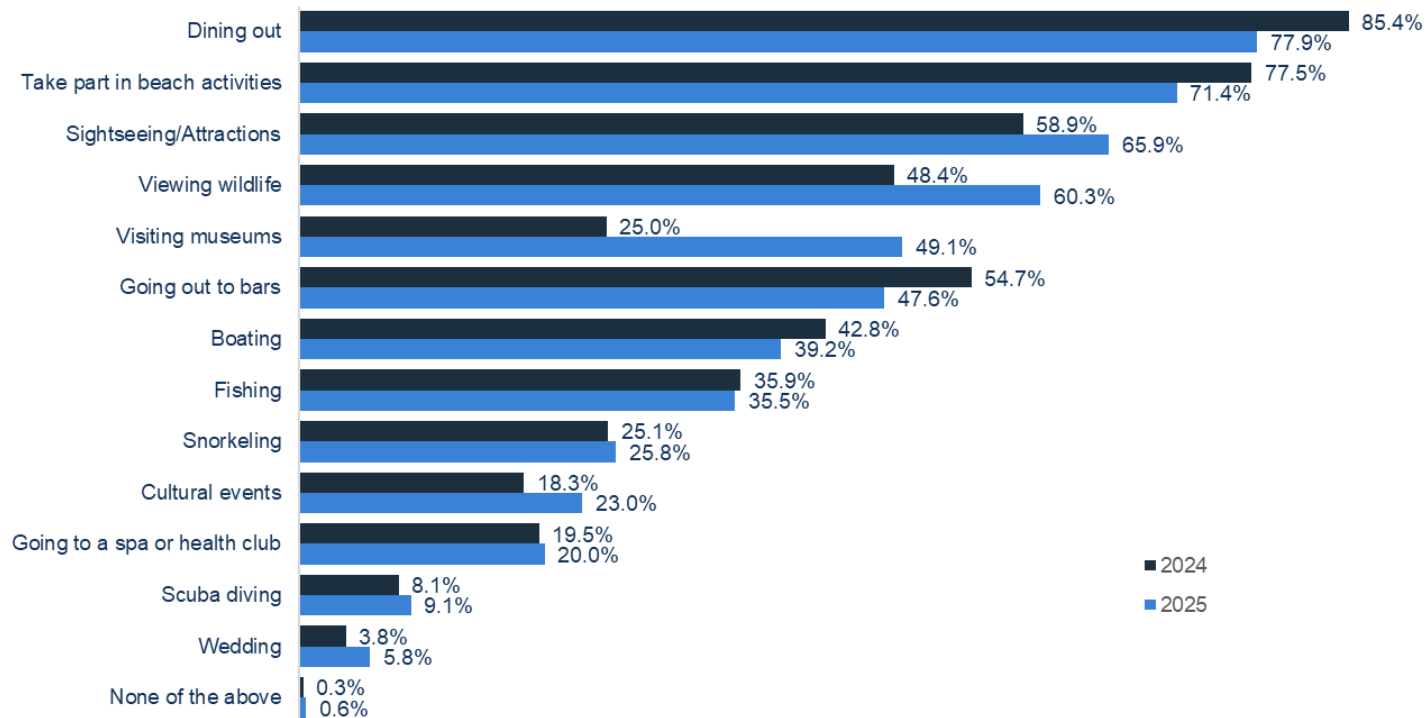
Spending Category	Average per person per trip		
	2024	2025	\$ +/-
Lodging	\$937	\$459	-\$478
Food & Beverage	\$358	\$342	-\$16
Transportation	\$81	\$57	-\$24
Water Recreation	\$59	\$40	-\$19
Land Recreation	\$57	\$36	-\$21
Retail	\$51	\$32	-\$18
Total	\$1,543	\$967	-\$577

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

Marathon Visitor Activity Participation

- In 2025, 77.9% of Marathon visitors dined out, down 7.5 points from 85.4% in 2024, while beach activities fell to 71.4% (down 6.1 points). Viewing wildlife climbed sharply to 60.3% (up 11.9 points), museum visits surged to 49.1% (up 24.1 points), while going out to bars rose to 47.6% (down 7.1 points).

Activities That Travel Party Members Participated In

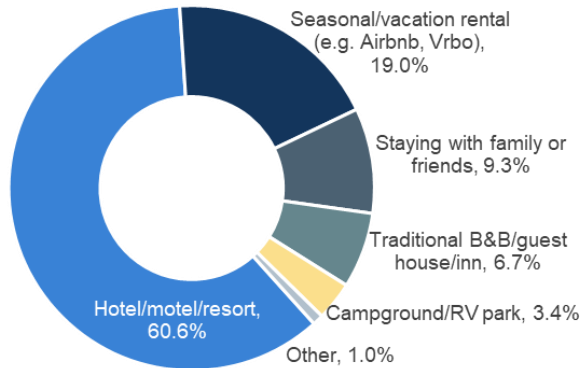


Q: While visiting the Florida Keys or Marathon, have you or anyone from your group gone: (Select all that apply)

Visitor Accommodations and Reservations

- In 2025, 60.6% of Marathon visitors stayed in a hotel, motel, or resort, a decline of 12.5 points from 73.1% in 2024. Seasonal and vacation rentals grew to 19.0% (up 8.2 points), and staying with family or friends rose to 9.3% (up 4.4 points). Traditional B&Bs held near-flat at 6.7%.
- In 2025, making reservations through travel sites remained the preferred option for travelers, despite dropping close to 10 points. Making direct calls to the property became the second most common booking method at 17.9%. Online property website bookings declined to 17.7% and travel agent usage rose to 11.9% (up 4.2 points). Fewer visitors (4.4%) made no advance reservation.

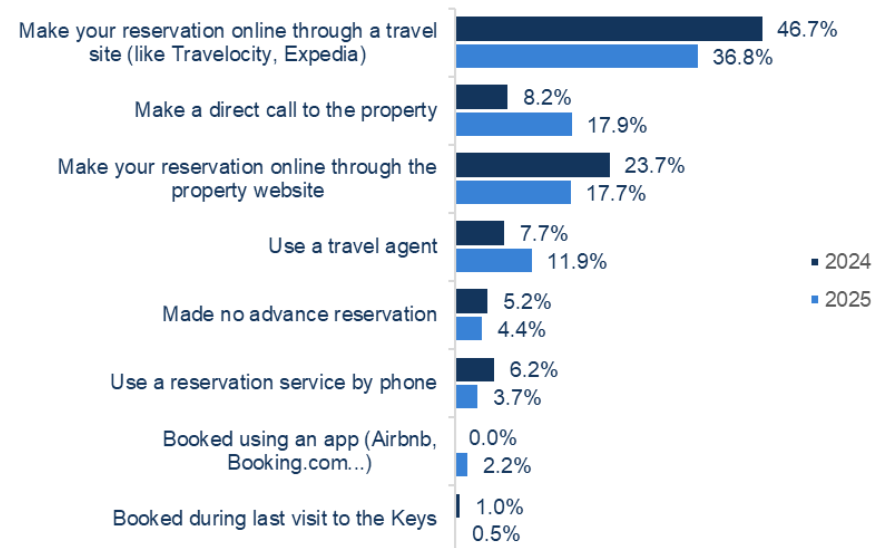
Primary Accommodations in the Keys



Accommodations During Visit	2024	2025	% +/-
Hotel/motel/resort	73.1%	60.6%	-12.5%
Seasonal/vacation rental (e.g. Airbnb, Vrbo)	10.8%	19.0%	8.2%
Staying with family or friends	4.9%	9.3%	4.4%
Traditional B&B/guest house/inn	6.5%	6.7%	0.2%
Campground/RV park	4.1%	3.4%	-0.7%
Other	0.6%	1.0%	0.4%

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

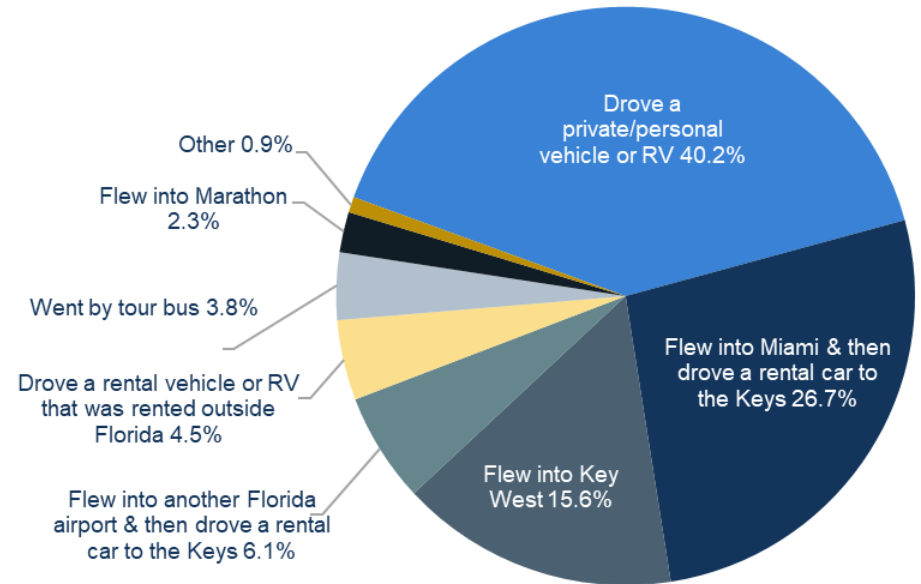
Q: When making your reservations for your accommodations, did you...

Marathon Visitor Transportation to the Keys

- In 2025, 40.2% of Marathon visitors drove their personal vehicle, up slightly from 39.4% in 2024. Flying into Miami and renting a car fell to 26.7% (down 4.9 points), while flying into Key West remained almost unchanged at 15.6%. Flying into another Florida airport and renting a car grew to 6.1% (up 3.6 points), and tour bus arrivals rose to 3.8% (up 1.4 points).

Primary Mode of Transportation to the Keys

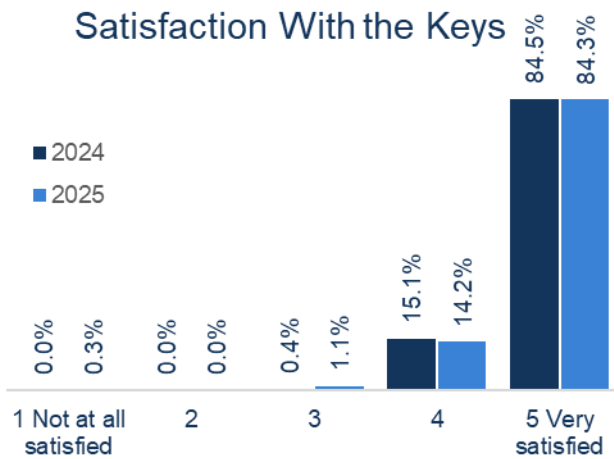
Primary Mode of Transportation	2024	2025	% +/-
Drove a private/personal vehicle or RV	39.4%	40.2%	0.8%
Flew into Miami & then drove a rental car to the Keys	31.6%	26.7%	-4.9%
Flew into Key West	15.2%	15.6%	0.4%
Flew into another Florida airport & then drove a rental car to the Keys	2.5%	6.1%	3.6%
Drove a rental vehicle or RV that was rented outside Florida	5.6%	4.5%	-1.1%
Went by tour bus	2.4%	3.8%	1.4%
Flew into Marathon	1.9%	2.3%	0.4%
Other	1.5%	0.9%	-0.6%



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

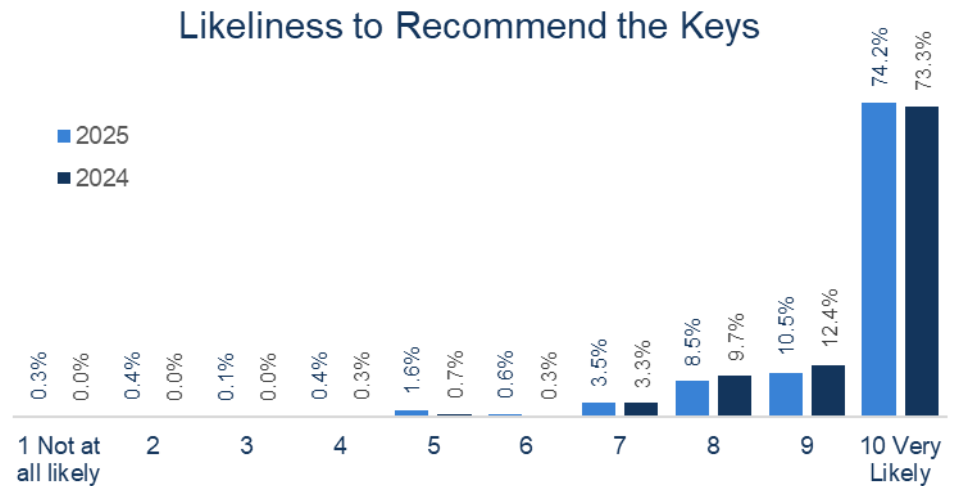
Satisfaction With the Keys and Recommendations to Visit the Keys

- The 2025 average Marathon visitor satisfaction rating was 4.8 out of 5—unchanged from 2024. The share of visitors that rated their satisfaction level a 5 was 84.3%, just below the 84.5% in 2024. The share rating it a 4 rose to 14.2% from 15.1%.
- The likelihood-to-recommend average was 9.4 out of 10 in 2025, almost unchanged from 2024 (9.5). The net promoter score was 81.3, a decline from 84.4 in 2024. Promoters (ratings of 9 or 10) accounted for 84.7% of visitors, including 74.2% who rated their likelihood to recommend a 10.



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?



Average Likeliness to Recommend
Average = 9.4

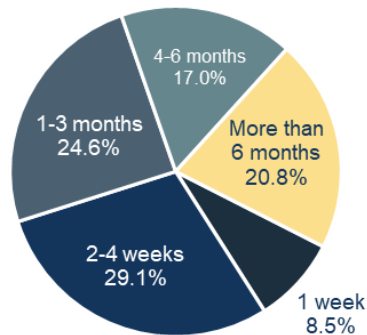
NPS
2024: 84.4
2025: 81.3

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?

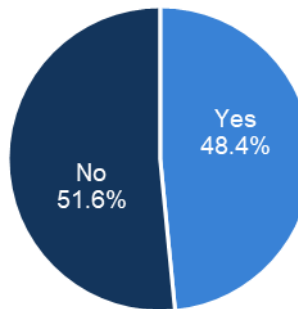
Trip Planning

- In 2025, Marathon visitors planned further in advance compared to 2024, with visitors planning more than 6 months out rising to 20.8% (up 5.0 points). The 2-4 week window grew to 29.1% (up 7.7 points). The 1-3 month window fell sharply to 24.6% (down 13.7 points), and last-minute planning (1 week) declined to 8.5%.
- Fewer visitors looked for a special deal in 2025: 48.4% sought a deal, a decline of 20.6 points from 69.0% in 2024. The majority (51.6%) did not seek a discount or added value offer.
- Traveler online review sites remained the top planning tool at 44.8%, down slightly from 48.1% in 2024. Social internet sites (38.5%) and Florida Keys official website (27.4%) also ranked among the top resources. Articles about travel grew to 22.1% (up 5.1 points).

Timing of Decision to Visit



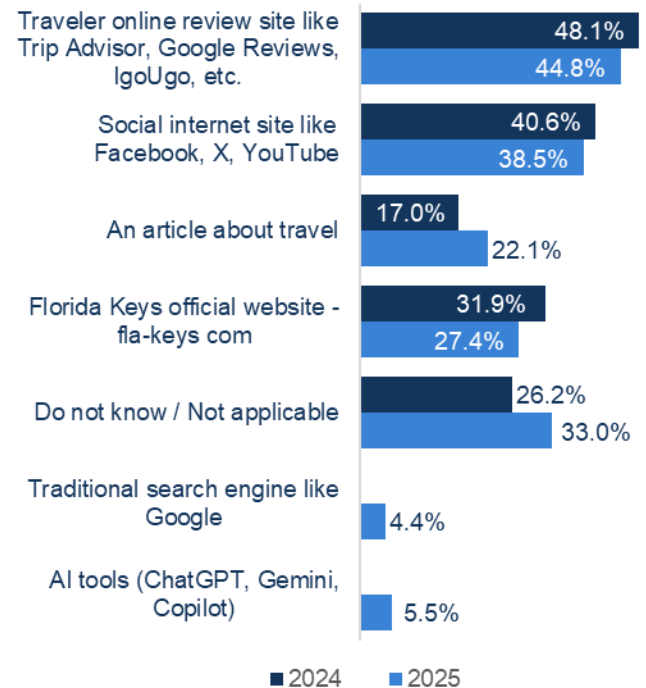
Looked for Special Deals



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



Timing of Decision	2024	2025	% +/-
1 week	12.0%	8.5%	-3.5%
2-4 weeks	21.4%	29.1%	7.7%
1-3 months	38.3%	24.6%	-13.7%
4-6 months	12.6%	17.0%	4.4%
More than 6 months	15.8%	20.8%	5.0%

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

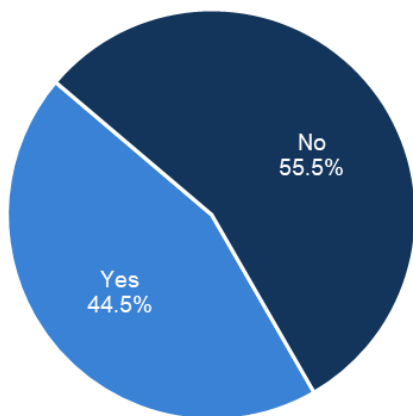
Looked for Deals	2024	2025	% +/-
Yes	69.0%	48.4%	-20.6%
No	31.0%	51.6%	20.6%

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

Advertising

- In 2025, 44.5% of Marathon visitors had seen or heard advertising for the Florida Keys or Marathon in the past three months, a slight increase of 1.0 point from 43.5% in 2024.
- Among those who saw or heard advertising, television remained the top channel at 60.4%, a decline from 65.8% in 2024. Internet and email newsletter awareness held nearly flat at 53.0%, while magazine awareness rose to 33.6% (up 14.3 points) and newspaper awareness grew to 21.7% (up 3.4 points).

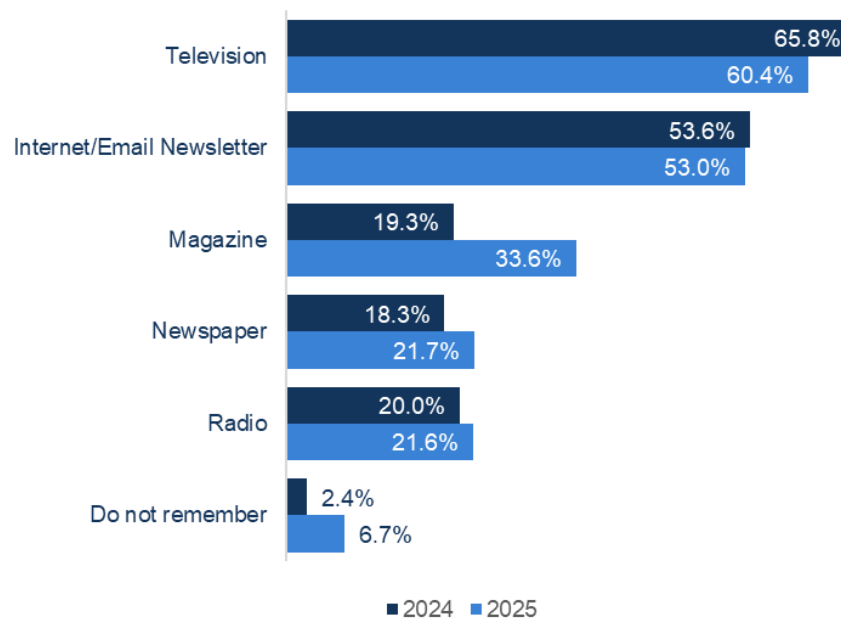
Recently Seen or Heard Advertising



Seen or Heard Advertising	2024	2025	% +/-
Yes	43.5%	44.5%	1.0%
No	56.5%	55.5%	-1.0%

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

Where Respondents Saw Advertising



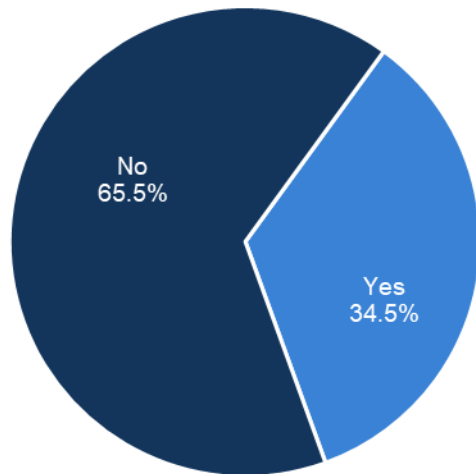
The answers for this question were changed in 2025 Q4, so those results were excluded

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

Visited Other Areas in Florida

- In 2025, 34.5% of Marathon visitors also visited other destinations in Florida on their trip, an increase of 5.2 points from 29.3% in 2024.
- Among those who visited elsewhere in Florida, Miami was the most popular at 66.4% (up 12.1 points), followed by Orlando at 50.7% (up 18.2 points) and Ft. Lauderdale at 31.7% (up 20.5 points). Tampa Area (16.3%) and West Palm/Palm Beach (13.9%) also drew Marathon visitors.

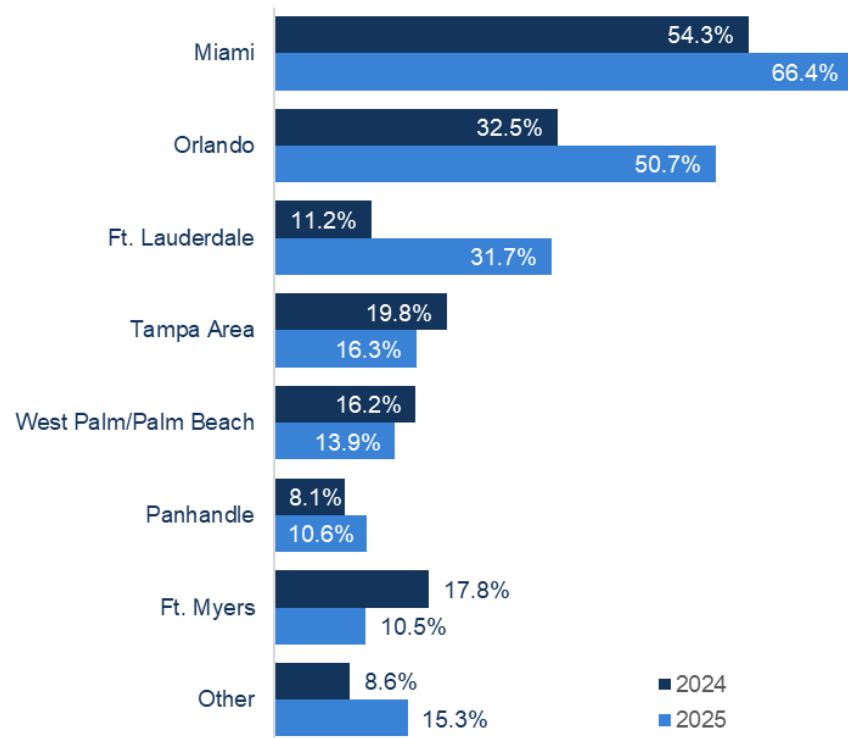
Visited Elsewhere in Florida



Visited Other Places	2024	2025	% +/-
Yes	29.3%	34.5%	5.2%
No	70.7%	65.5%	-5.2%

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

Visited Other Places in Florida

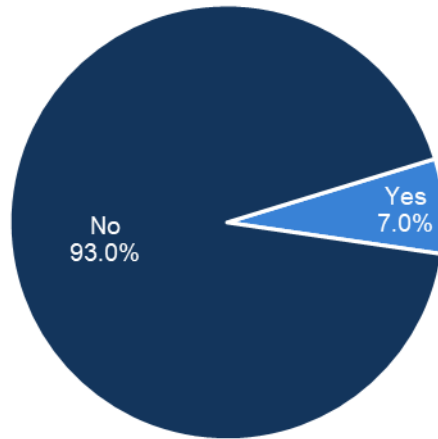


Q: Where else in Florida did you visit besides the Keys?

Own Property Elsewhere in Florida

- In 2025, 7.0% of Marathon visitors owned a second home or vacation property elsewhere in Florida, an increase of 1.8 points from 5.2% in 2024. Among those who owned property, Tampa Area (49.7%) and West Palm/Palm Beach (35.8%) were the most common locations, both showing large increases from 2024.

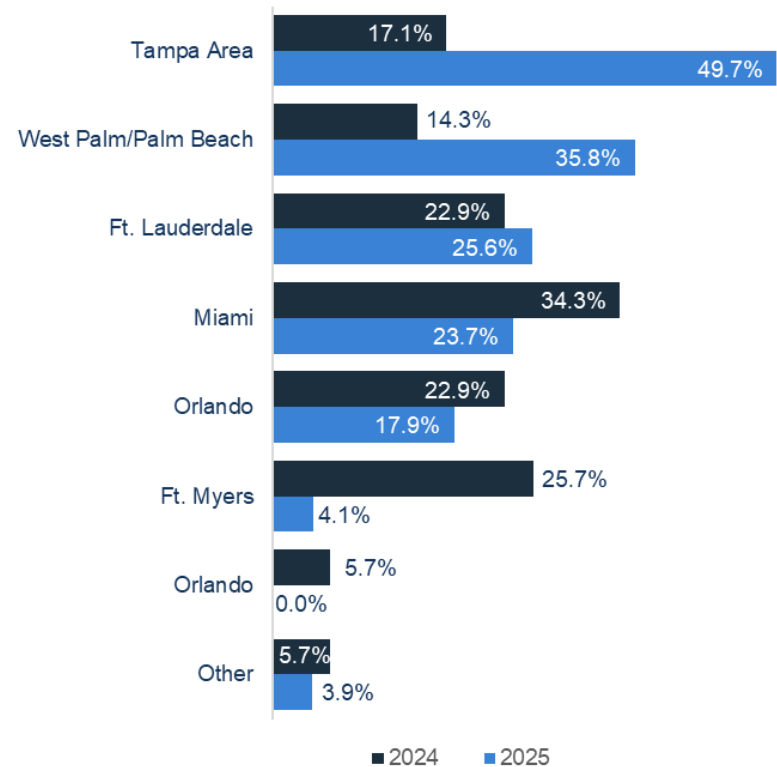
Second Home or Vacation Property in Florida



Own Second Home	2024	2025	% +/-
Yes	5.2%	7.0%	1.8%
No	94.8%	93.0%	-1.8%

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

Second Home or Vacation Property Located in Florida

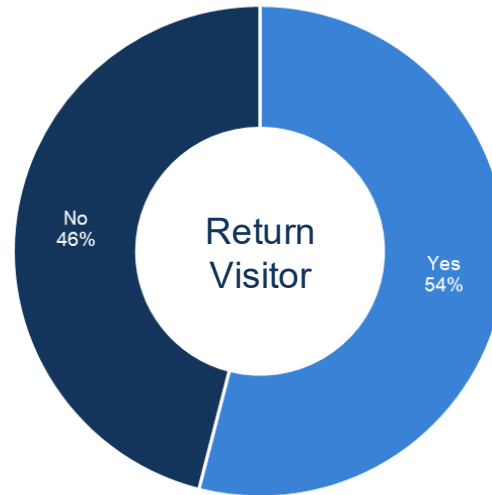


The question was removed from the survey in 2025 Q4

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

Return Visitation of Marathon Visitors to the Florida Keys

- In 2025, 54.0% of Marathon visitors had visited the Florida Keys at least one other time in the past three years, an increase of 2.4 points from 51.6% in 2024.



Visited in Past 3 Years	2024	2025	% +/-
Yes	51.6%	54.0%	2.4%
No	48.4%	46.0%	-2.4%

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:



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