



ROCKPORT
ANALYTICS

KEY WEST VISITOR PROFILE STUDY

2025 H2 RESULTS

MARCH 2026

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

Study Overview & Methodology

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

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

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

Responses Collected: 2025 (n=709 Total)

Month	Key West
July	132
August	143
September	75
October	107
November	139
December	113

2025 H2 Key West Visitor Highlights

Florida Keys VPS
Key West
Results
2025 H2

Visitor profile and trip behavior

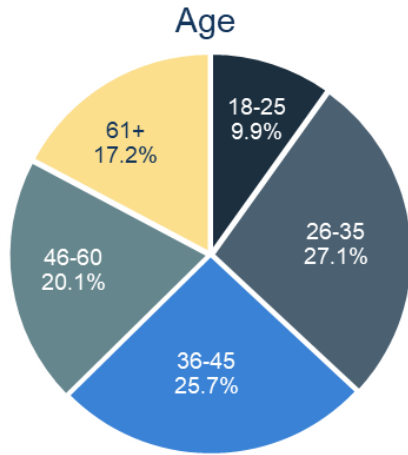
- Males now account for 59.7% of Key West visitors in 2025 H2, up 9.6 points from 2024 H2. The average visitor age dropped to 42 years, 3 years younger than 2024 H2, with Millennials comprising 43.8% of visitors.
- New York surged to 12.9% of visitors (up 4.6 points), while Texas grew to 9.3% (up 4.1 points). Florida in-state visitors rose to 20.4%. US visitors fell to 71.7% of total — a sharp 15-point drop — while Canada grew to 5.0% and all other countries combined to 23.3%.
- The average travel party size remained 3.1 in 2025 H2. Those traveling with a spouse or partner rose to 69.6% (up 7.5 points). 39.1% traveled as a party of 2, up from 35.7% in 2024 H2.
- The share of visitors staying 1–3 nights fell to 58.1% while 4–7 night stays rose sharply to 40.8%, up 14.9 points. Average length of stay dropped to 3.5 nights from 5.2 in 2024 H2.
- Recreation and vacation remained the primary trip purpose for 80.3% of visitors (up 8.9 points). Relaxing and escaping was the top single experience cited by 51.3% of visitors (up 7.8 points).
- Friend or family recommendation surged to 57.5% as the top visit influencer, up 19.7 points from 2024 H2. Past visitation fell to 25.7% (down 3.6 points).

Spend, satisfaction, and marketing outcomes

- Total per-person spending averaged \$1,112 in 2025 H2, down \$264 from 2024 H2. Lodging fell to \$524 (-\$263), food and beverage to \$358 (-\$194), transportation to \$69 (-\$56), and water recreation to \$63 (-\$30). Land recreation and retail declined modestly.
- Average satisfaction held at 4.8 in 2025 H2, up from 4.7 in 2024 H2. The NPS was 69.8, with 98.5% of visitors satisfied or very satisfied and 96.3% likely or very likely to recommend Key West.
- Hotels/motels/resorts grew to 65.9% of accommodations (up 2.9 points). Online travel sites remained the top booking method at 47.5%, while travel agent usage rose to 15.5% (up 6.2 points) and app-based booking appeared as a new channel at 9.9%.
- Only 34.5% of visitors recalled seeing Keys advertising in 2025 H2. Among those who did, TV dominated at 62%, while newspaper awareness grew to 33.6% (+17.1 points) and internet/email newsletter awareness fell to 31.9% (-15.7 points).
- Return visitation declined: 45.0% of 2025 H2 visitors had been to the Keys in the past three years, down 12.4 points from 57.3% in 2024 H2.

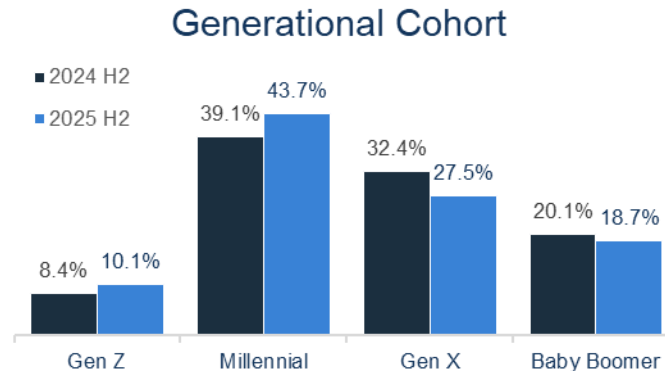
Visitor Demographics: Age, Generational Cohort, and Gender

- The average age of Key West visitors in 2025 H2 was 42, which is three years less than 2024 H2. The largest proportion (27.1%) of travelers were in the age group of 26-35, while 25.7% were 36-45 and 20.1% were 46-60. The largest increase from 2024 H2 was in the 26-35 age group (2.7 points), while the largest decline was in the 46-60 age group (-5.9%).
- Over 43% of visitors in 2025 H2 were Millennials, followed by 27.5% Generation X, and 18.7% Baby Boomers. The largest change from a year ago can be seen in the 5 point increase in Millennial travelers, and the 5 point decrease in Gen X.
- The gender mix of visitors was 59.7% male and 40.2% female. The share of males increase 9.6 points compared to the previous year.

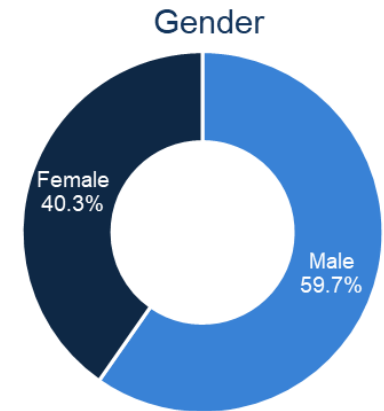


Average Age
2024 H2: 45 years
2025 H2: 42 years

Q: What is your age?



Q: What is your age?



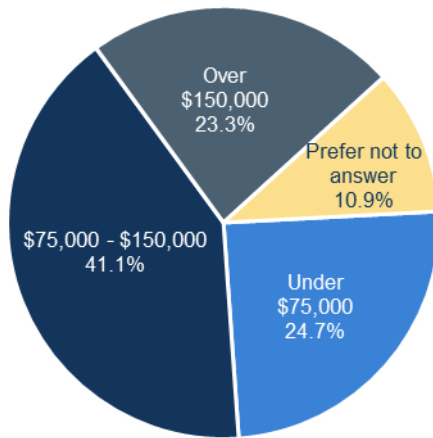
Gender	2024 H2	2025 H2	% +/-
Male	50.1%	59.7%	9.6%
Female	49.9%	40.2%	-9.7%

Q: What is your gender?

Visitor Demographics: Income, Ethnicity and Sexual Orientation

- The average household income of Key West visitors in 2025 H2 was \$118,077, a decrease of \$5,639 from the \$123,716 recorded in 2024 H2. The largest income bracket was \$75,000–\$150,000 (41.1%), followed by those earning over \$150,000 (23.3%).
- Non-Hispanic White visitors made up 65% of 2025 H2 visitors, a decline of 10.7 points from 2024 H2. Hispanic/Spanish/Latino visitors accounted for 9%, while African American/Black visitors represented 19%, up from 12% a year prior.
- Most 2025 H2 visitors (91.5%) identified as straight/heterosexual, a decrease of 1.5 points from 2024 H2. Bisexual visitors rose slightly to 3.9%, and Gay/Homosexual visitors increased to 2.1%.

Household Income



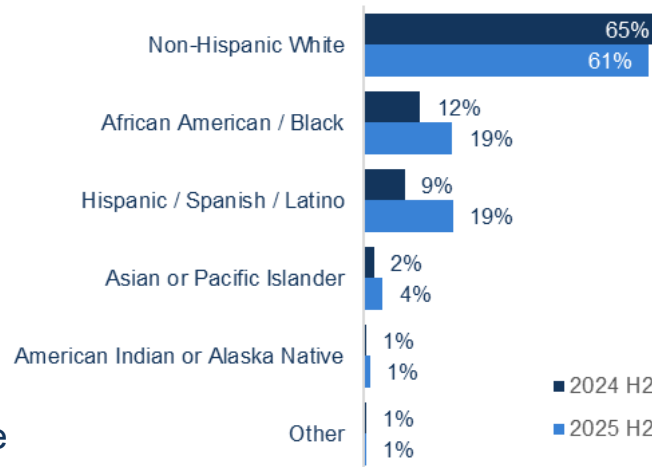
Average Household Income

2024 H2: : \$123,716

2025 H2: \$118,077

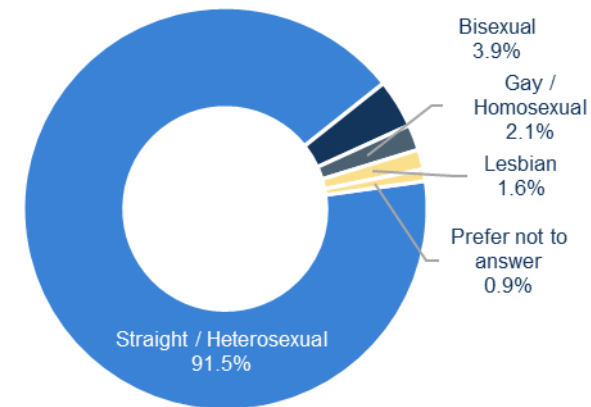
Q: What is the total annual income of your household?

Ethnicity



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

Sexual Orientation



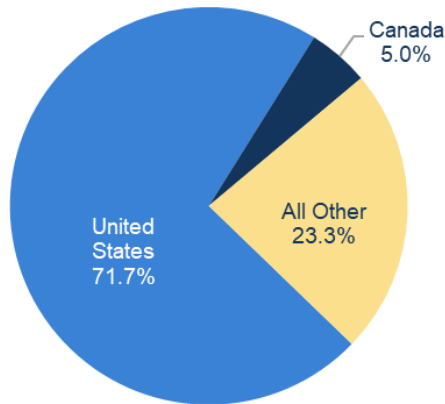
Sexual Orientation	2024 H1	2024 H2	% +/-
Straight / Heterosexual	93.0%	91.5%	-1.5%
Bisexual	3.2%	3.9%	0.7%
Gay / Homosexual	1.6%	2.1%	0.5%
Lesbian	1.9%	1.6%	-0.3%
Prefer not to answer	0.3%	0.9%	0.6%

Q: Orientation?

Origin of Visitors

- In 2025 H2, 71.7% of Key West visitors were from the United States, a sharp decrease of 15.0 points from 86.7% in 2024 H2. Canadian visitors grew to 5.0% (up 5.0 points), while all other international visitors rose to 23.3% of arrivals, an increase of 10.0 points from a year ago.
- Of US visitors, 20.4% came from within Florida, an increase of 2.8 points from 2024 H2. New York was the top out-of-state source at 12.9% (up 4.6 points), followed by Texas at 9.3% (up 4.1 points). California declined from 7.4% to 5.1%, while Illinois fell from 5.5% to 3.7%.

Visitor Origin



Country of Origin	2024 H2	2025 H2	% +/-
United States	86.7%	71.7%	-15.0%
Canada	0.0%	5.0%	5.0%
All Other	13.3%	23.3%	10.0%

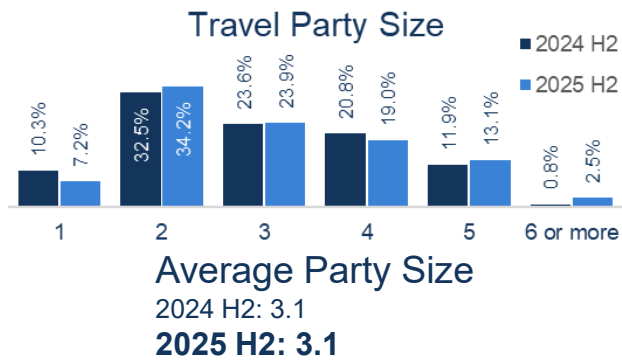
Q: What country do you currently live in?
Percentages are based on intercept survey collections

State of Origin	Percent	
	2024 H2	2025 H2
Florida	17.6%	20.4%
New York	8.3%	12.9%
Texas	5.2%	9.3%
Georgia	6.1%	5.8%
California	7.4%	5.1%
Michigan	2.5%	3.9%
Illinois	5.5%	3.7%
Pennsylvania	2.5%	3.3%
North Carolina	2.2%	2.5%
Tennessee	2.2%	2.3%

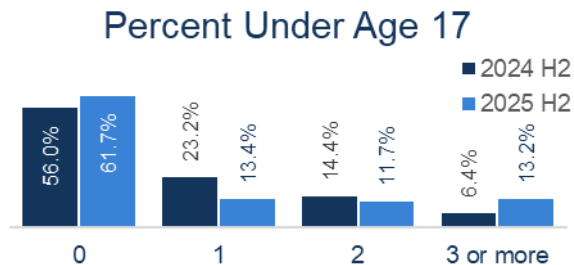
All other states were <2.0% each
Q: Where in the U.S. do you live?

Travel Party Size and Travel Companions

- The average Key West travel party size in 2025 H2 remained 3.1, unchanged from 2024 H2. Those traveling in pairs rose to 34.2% (up 1.7 points), while solo travelers declined to 6.2% (down 1.6 points). Groups of 3 grew from 23.6% to 23.9%, and parties of 4 or more also increased.
- In 2025 H2, 61.7% of visitors did not travel with children under age 17, up 5.7 points from 2024 H2. Those traveling with one minor increased to 13.4%, and those with three or more minors grew to 13.2%, up 6.8 points.
- The majority (69.6%) of 2025 H2 visitors traveled with a spouse, partner, girlfriend, or boyfriend, an increase of 7.5 points from 2024 H2. Children/step-children were the second most common travel companion at 32.1%, while those traveling with friends of mixed genders rose to 11.7%.

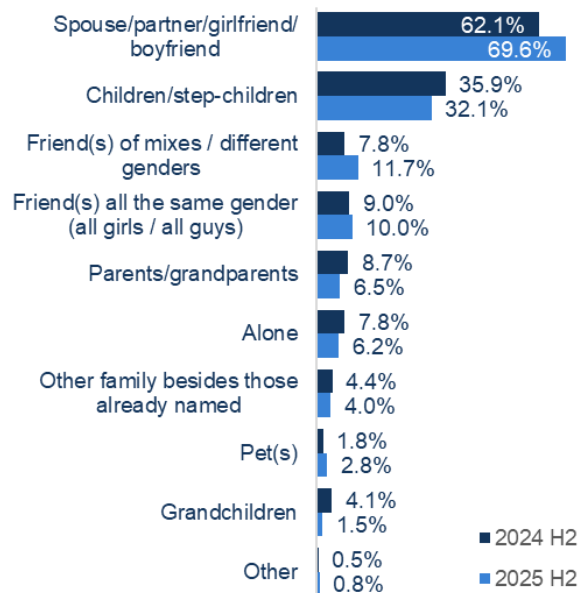


Q: Including yourself, how many people are in your travel party?



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

Travel Companions



39.1% were traveling as a party of 2 in 2025 H2, compared to 35.7% in 2024 H2

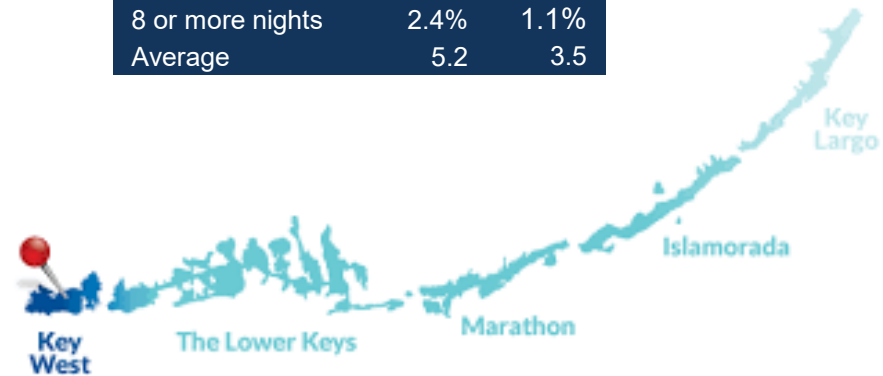
Q: What best describes the people you are traveling with (Select all that apply)?

Visitors' Length of Stay in Key West

- The average length of stay for Key West visitors in 2025 H2 was 3.5 nights, down 1.7 nights from the 5.2 average recorded in 2024 H2.
- The share of visitors staying 1–3 nights declined to 58.1% in 2025 H2, down 13.6 points from 71.7% in 2024 H2. Meanwhile, 4–7 night stays surged to 40.8%, a 14.9-point increase from 25.9% in 2024 H2. Stays of 8 or more nights declined slightly to 1.1%.



Length of Stay in Key West		
July-December	2024	2025
1-3 nights	71.7%	58.1%
4-7 nights	25.9%	40.8%
8 or more nights	2.4%	1.1%
Average	5.2	3.5

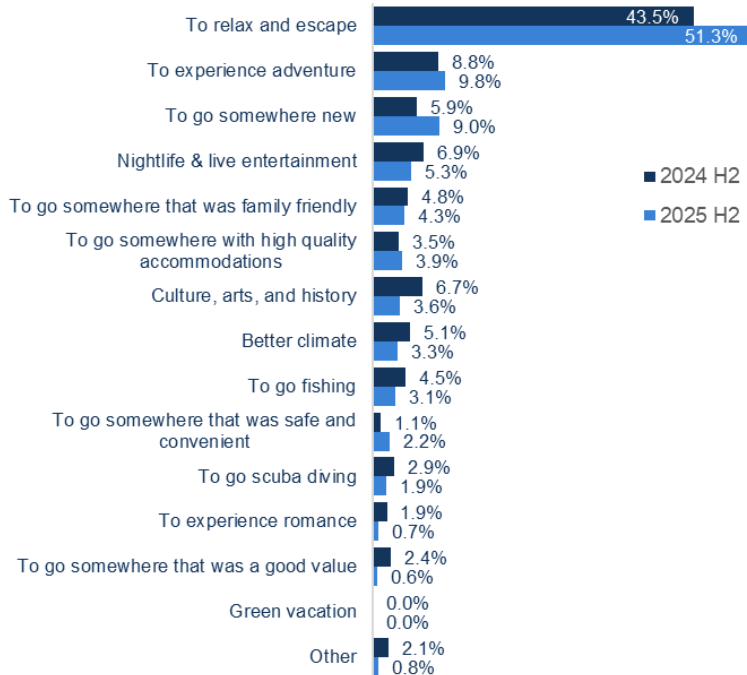


Q: How many nights will you stay in each of the Florida Keys?

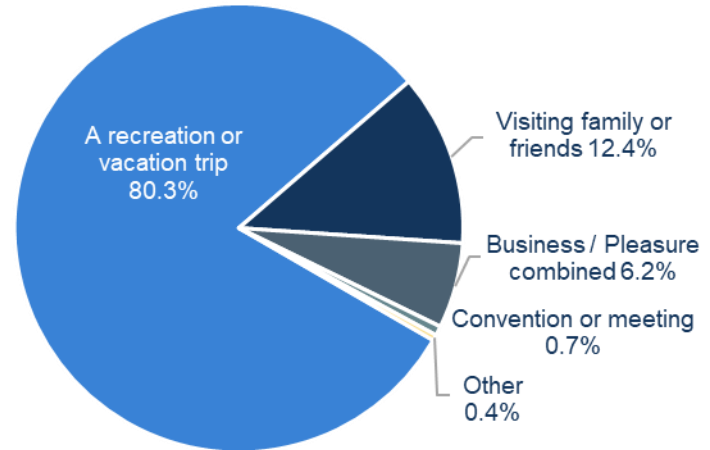
Primary Reasons and Experiences That Drive Visitors to the Florida Keys

- In 2025 H2, 51.3% of Key West visitors chose to relax and escape as the one experience that best describes why they visited the Florida Keys, up 7.8 points from 43.5% in 2024 H2. Going to experience adventure followed at 9.8%, while going somewhere new rose to 9.0%.
- Over four-fifths (80.3%) of 2025 H2 visitors indicated the primary purpose for their Keys visit was a recreation or vacation trip, an 8.9-point increase from 71.4% in 2024 H2. Visiting family or friends declined to 12.4% (-5.6 points), and business/pleasure combined fell to 6.2%.

One Experience Which Best Describes Why Florida Keys



Primary Purpose of Visit to the Keys



Primary Purpose of Visit	2024 H2	2025 H2	% +/-
A recreation or vacation trip	71.4%	80.3%	8.9%
Visiting family or friends	18.0%	12.4%	-5.6%
Business / Pleasure combined	8.8%	6.2%	-2.6%
Convention or meeting	1.3%	0.7%	-0.6%
Other	0.5%	0.4%	-0.1%

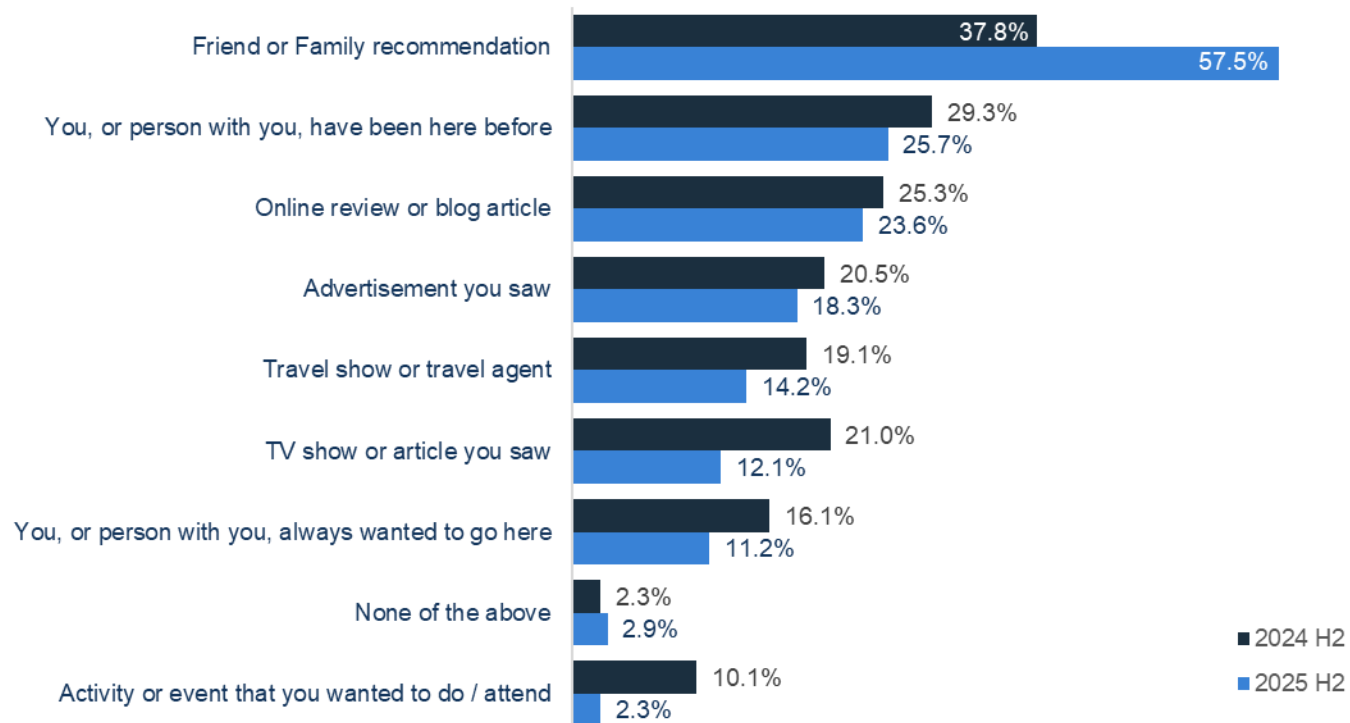
Q: Which ONE of your experiences BEST describes why you decided to visit the Florida Keys?

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

Key Influencers for Visits to Key West

- The top influencer for visiting Key West in 2025 H2 was a friend or family recommendation, cited by 57.5% of visitors — a dramatic increase of 19.7 points from 37.8% in 2024 H2. Past visitation (25.7%) remained second but declined 3.6 points. Online reviews or blog articles (23.6%) and advertisement exposure (18.3%) also ranked among the top influencers.

Key Influencer in Visiting the Florida Keys

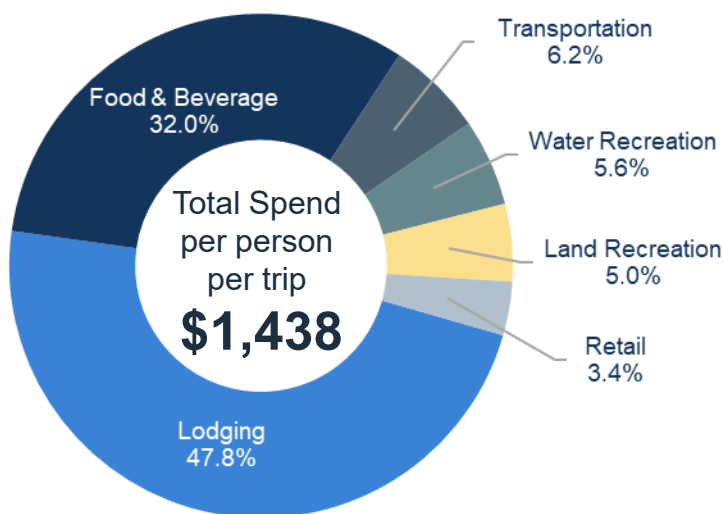


Q: Which of the following influenced you to first think Florida Keys? (Select all that apply)

Visitor Spending

- On average, Key West visitors spent \$1,112 per person per trip in 2025 H2, a decrease of \$264 from the \$1,376 recorded in 2024 H2. Lodging remained the largest spending category at \$524 per person (47.2% of total spend), followed by food and beverage at \$358 (32.2%).
- Compared to 2024 H2, visitors saw declines across all categories. Lodging decreased by \$263 (-33.4%), food and beverage by \$194 (-35.1%), transportation by \$56 (-44.8%), and water recreation by \$30 (-32.3%). Land recreation (-\$3) and retail (-\$9) saw the smallest absolute decreases.

Average Spent Per Person Per Trip



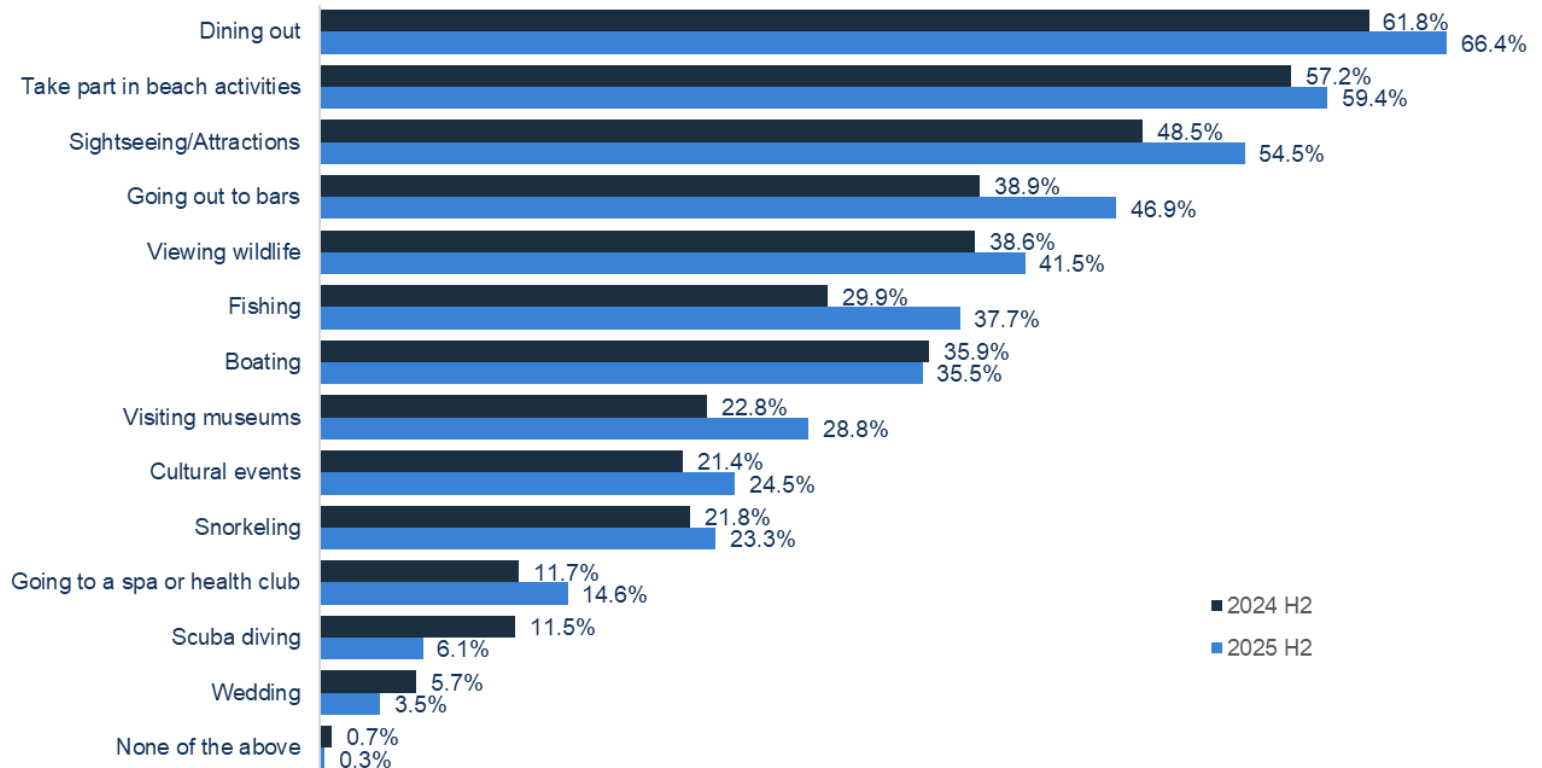
Spending Category	Average per person per trip		
	2024 H2	2025 H2	\$ +/-
Lodging	\$787	\$524	-\$263
Food & Beverage	\$552	\$358	-\$194
Transportation	\$125	\$69	-\$56
Water Recreation	\$93	\$63	-\$30
Land Recreation	\$60	\$57	-\$3
Retail	\$50	\$41	-\$9
Total	\$1,376	\$1,112	-\$264

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

Visitor Activity Participation

- In 2025 H2, dining out remained the top activity at 61.8% of Key West visitors, though this represented a slight decline from the prior period. Beach activities followed closely at 57.2%, while sightseeing/attractions (48.5%) and going out to bars (38.9%) rounded out the top four. Compared to 2024 H2, the largest increases came from going out to bars (+8.0 points) and sightseeing (+6.0 points), while fishing declined most notably (-7.8 points).

Activities That Travel Party Members Participated In

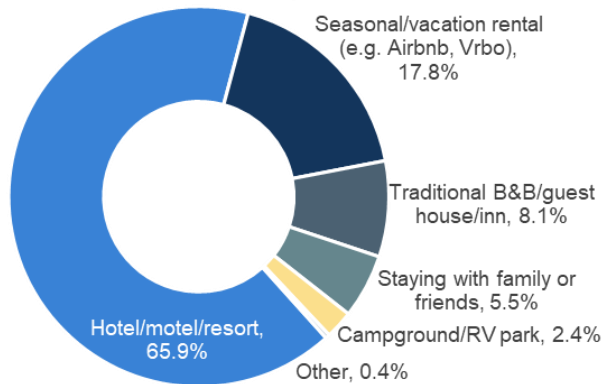


Q: While visiting the Florida Keys or Key West, have you or anyone from your group gone: (Select all that apply)

Visitor Accommodations and Reservations

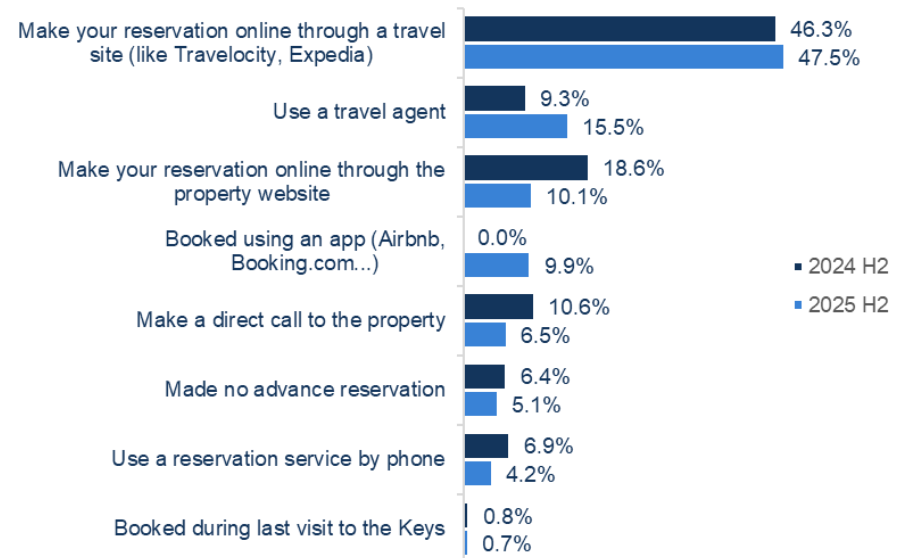
- In 2025 H2, 65.9% of Key West visitors stayed in a hotel, motel, or resort, an increase of 2.9 points from 2024 H2. Seasonal/vacation rentals (17.8%) and traditional B&Bs (8.1%) were the next most common accommodation types, with B&Bs declining 3.3 points year-over-year.
- Online travel sites remained the most common reservation method at 47.5%, up 1.2 points from 2024 H2. Travel agent usage grew significantly to 15.5% (up 6.2 points). App-based booking (e.g., Airbnb, Booking.com) emerged as a new channel at 9.9%, while reservations made directly through property websites fell to 10.1% (-8.5 points).

Primary Accommodations in the Keys



Accommodations During Visit	2024 H2	2025 H2	% +/-
Hotel/motel/resort	63.0%	65.9%	2.9%
Seasonal/vacation rental (e.g. Airbnb, Vrbo)	14.9%	17.8%	2.9%
Traditional B&B/guest house/inn	11.4%	8.1%	-3.3%
Staying with family or friends	7.4%	5.5%	-1.9%
Campground/RV park	2.7%	2.4%	-0.3%
Other	0.5%	0.4%	-0.1%

Method of Accommodation Reservation



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

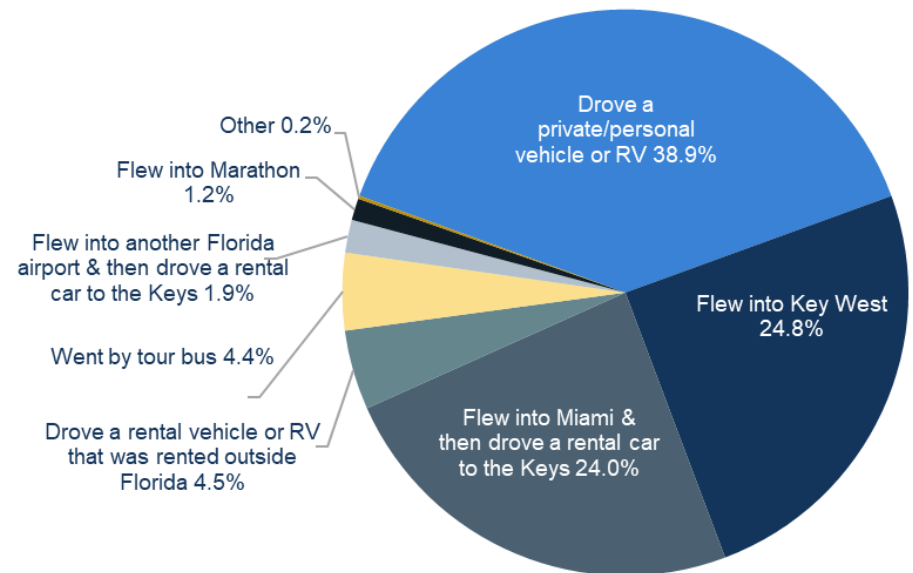
Q: Which of the following best describes your accommodations while staying in the Florida Keys?

Visitor Transportation to the Keys

- In 2025 H2, driving a personal vehicle or RV remained the most common way to reach Key West at 38.9% (up 1.9 points). Flying into Key West directly surged to 24.8% (up 6.7 points from 18.1% in 2024 H2), making it as common as flying into Miami and renting a car (24.0%). Renting a vehicle outside Florida dropped sharply by 7.7 points to just 4.5%.

Primary Mode of Transportation	2024 H2	2025 H2	% +/-
Drove a private/personal vehicle or RV	37.0%	38.9%	1.9%
Flew into Key West	18.1%	24.8%	6.7%
Flew into Miami & then drove a rental car to the Keys	22.9%	24.0%	1.1%
Drove a rental vehicle or RV that was rented outside Florida	12.2%	4.5%	-7.7%
Went by tour bus	4.5%	4.4%	-0.1%
Flew into another Florida airport & then drove a rental car to the Keys	1.9%	1.9%	0.0%
Flew into Marathon	2.9%	1.2%	-1.7%
Other	0.5%	0.2%	-0.3%

Primary Mode of Transportation to the Keys

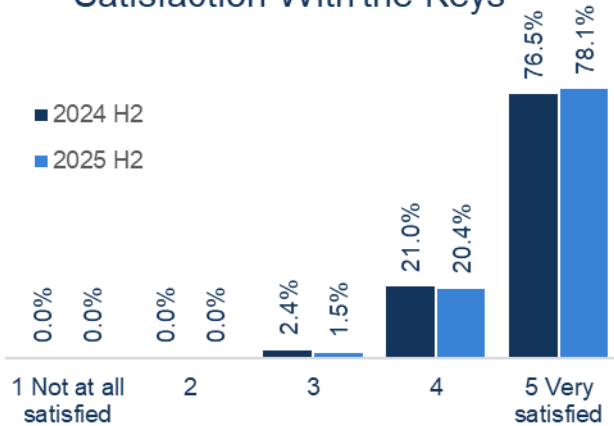


Q: How did you get to the Florida Keys on your trip?

Satisfaction With the Keys and Recommendations to Visit the Keys

- The 2025 H2 average visitor satisfaction rating was 4.8 out of 5, up 0.1 points from 4.7 in 2024 H2. Notably, 78.1% of visitors rated their satisfaction as 5/5 (very satisfied), a 1.6-point increase from 76.5% a year ago.
- The likelihood-to-recommend average was 9.1 out of 10 in 2025 H2, unchanged from 2024 H2. The net promoter score was 69.8, with 96.3% of visitors indicating they were likely or very likely to recommend Key West to others. Promoters (those rating 9 or 10) made up 73.1% of respondents, while detractors (1 through 6) accounted for just 3.3%.

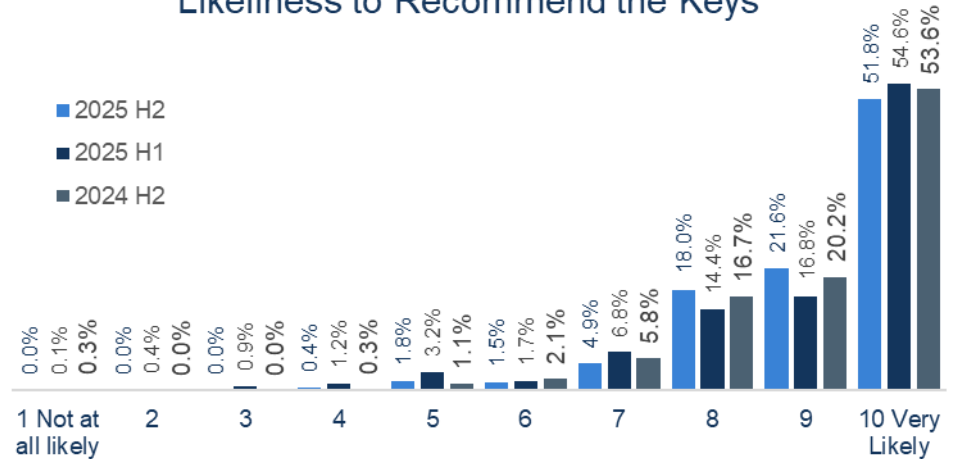
Satisfaction With the Keys



Average Satisfaction
2024 H2: 4.7
2025 H2: 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?

Likelihood to Recommend the Keys



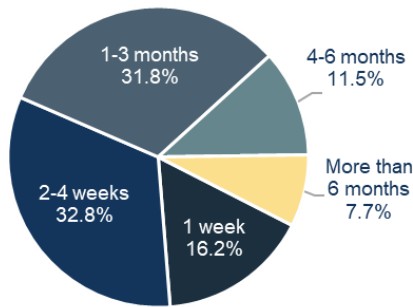
Likelihood to Recommend Average = 9.1
Net Promoter Score = 69.8

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?

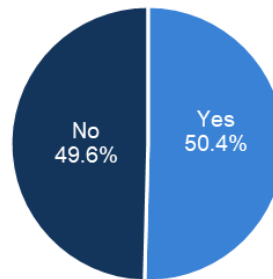
Keys Trip Planning

- In 2025 H2, the 2–4 week planning window was the most common at 32.8%, similar to the 34.2% in 2024 H2. The 1–3 month window declined by 5.1 points to 31.8%, while trips planned more than 6 months out grew to 7.7% (up 2.9 points). Last-minute planning (1 week) rose 4.7 points to 16.2%.
- Fewer visitors looked for special deals in 2025 H2: 50.4% sought a deal, down 9.7 points from 60.1% in 2024 H2. The share of visitors not seeking deals rose to 49.6%.
- Social internet sites (58.4%) and traveler online review sites (50.1%) were the top trip-planning tools in 2025 H2. The Florida Keys official website was used by 28.8% of visitors (-5.8 points), while traditional search engines (22.2%) and AI tools like ChatGPT (17.1%) appeared as new planning resources introduced in 2025 Q4.

Timing of Decision to Visit



Looked for Special Deals

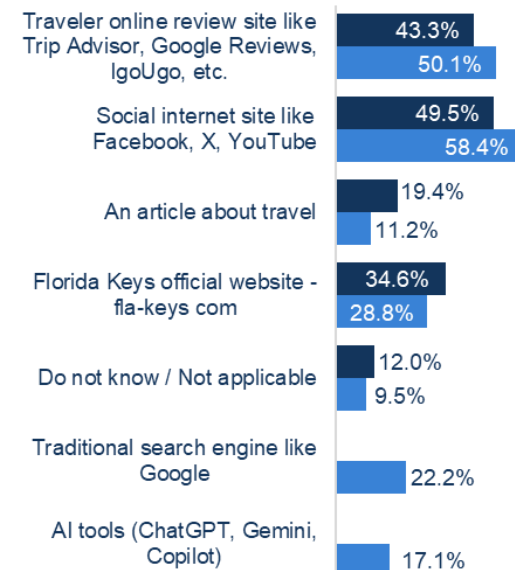


Looked for Deals	2024 H2	2025 H2	% +/-
Yes	60.1%	50.4%	-9.7%
No	39.9%	49.6%	9.7%

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



■ 2024 H2 ■ 2025 H2

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

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

Source: Rockport Analytics

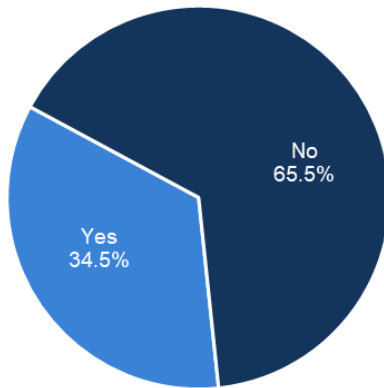
Timing of Decision	2024 H2	2025 H2	% +/-
1 week	11.5%	16.2%	4.7%
2-4 weeks	34.2%	32.8%	-1.4%
1-3 months	36.9%	31.8%	-5.1%
4-6 months	12.6%	11.5%	-1.1%
More than 6 months	4.8%	7.7%	2.9%

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

Exposure to Keys Advertising

- In 2025 H2, 34.5% of Key West visitors had seen or heard advertising for the Florida Keys or Key West in the three months prior to their trip, compared to 43.7% in 2024 H2 — a decline of 9.2 points.
- Among those who had seen or heard advertising, television was the most recalled channel at 62.0% (up 10.1 points from 2024 H2). Newspaper awareness rose sharply to 33.6% (up 17.1 points), while internet/email newsletter awareness fell to 31.9% (-15.7 points). Magazine awareness also increased to 30.3% (+5.1 points).

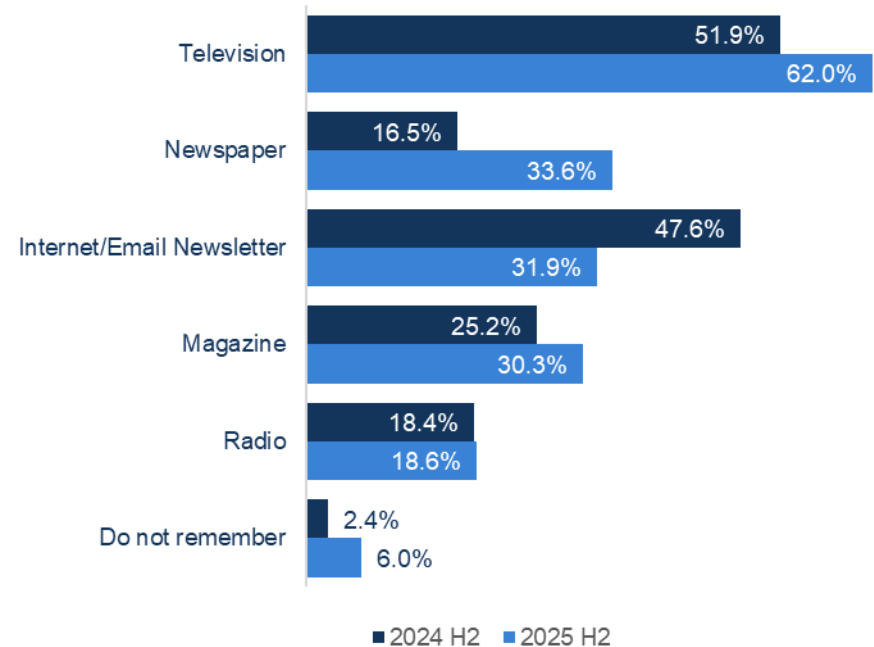
Recently Seen or Heard Advertising



Seen or Heard Advertising	2024 H2	2025 H2	% +/-
Yes	43.7%	34.5%	-9.2%
No	56.3%	65.5%	9.2%

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

Where Respondents Saw Advertising

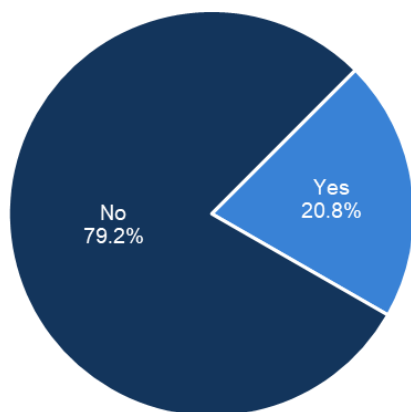


Q: Where did you see advertising for the Florida Keys and/or Key West?

Visiting Other Florida Destinations

- In 2025 H2, 20.8% of Key West visitors also visited other destinations in Florida on their trip, a decrease of 3.6 points from 24.4% in 2024 H2.
- Among those who visited other Florida destinations, Miami was the most popular at 59.5% (up 9.0 points from 2024 H2), followed by Orlando at 47.4% (up 11.1 points). Tampa Area visits declined to 16.5% (-8.8 points) and West Palm/Palm Beach fell to 18.1% (-7.2 points).

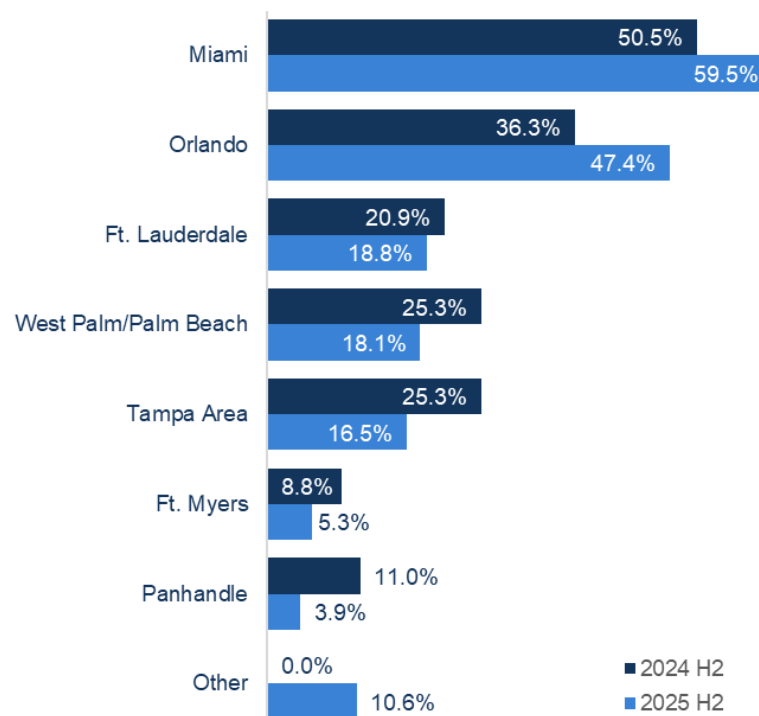
Visited Elsewhere in Florida



Visited Other Places	2024 H2	2025 H2	% +/-
Yes	24.4%	20.8%	-3.6%
No	75.6%	79.2%	3.6%

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

Visited Other Places in Florida

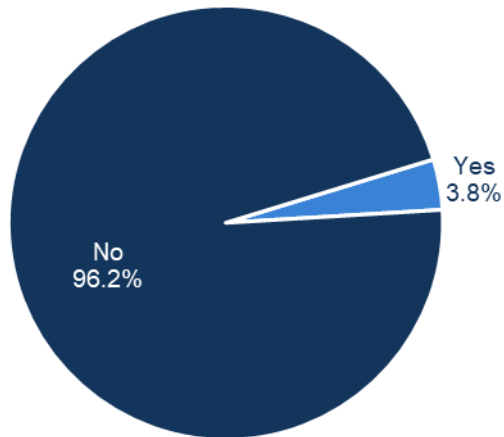


Q: Where else in Florida did you visit besides the Keys?

Own Property Elsewhere in Florida

- In 2025 H2, 3.8% of Key West visitors owned a second home or vacation property elsewhere in Florida, a decrease of 1.0 point from 4.8% in 2024 H2. Among those who owned property, the Tampa Area (48.3%) and West Palm/Palm Beach (44.5%) were the most common locations, both showing large increases from 2024 H2.

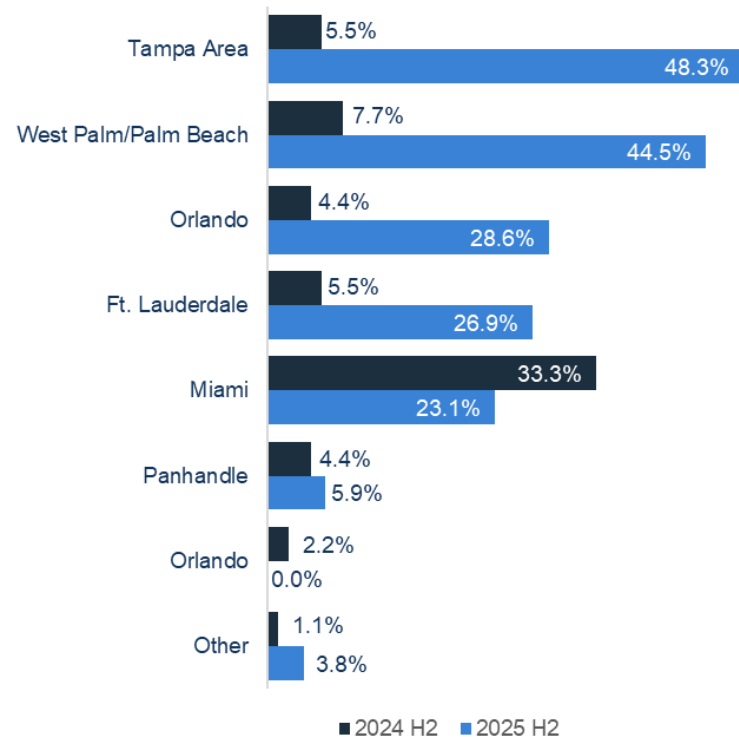
Second Home or Vacation Property in Florida



Own Second Home	2024 H2	2025 H2	% +/-
Yes	4.8%	3.8%	-1.0%
No	95.2%	96.2%	1.0%

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

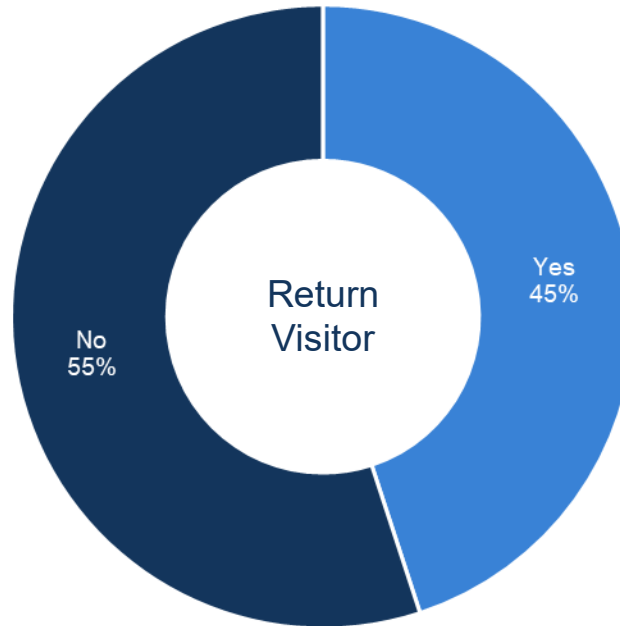
Second Home or Vacation Property Located in Florida



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

Return Visitors to the Florida Keys

- In 2025 H2, 45.0% of Key West visitors had visited the Florida Keys at least once in the past three years, a decline of 12.4 points from 57.3% in 2024 H2. Conversely, the share of first-time or lapsed visitors rose to 55.0%, up 12.4 points.



Visited in Past 3 Years	2024 H2	2025 H2	% +/-
Yes	57.3%	45.0%	-12.4%
No	42.7%	55.0%	12.4%

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

About Rockport Analytics

Rockport Analytics is a research and analytical consulting firm providing high quality quantitative and qualitative research solutions to business, government, and non-profit organization clients across the globe. We provide fast, nimble service in a completely transparent environment.

Capabilities include:

- Market Analysis and Forecasting
- Economic Impact Assessment, Tourism Satellite Accounting, and Economic Development
- Market Modeling and Decision Support Tools
- Project Feasibility Assessment
- Primary and Secondary Research Synthesis
- Stakeholder Surveys – internal & external



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