

June 8, 2026

THE BOTTOM LINE

Preliminary May 1-30 daily hotel data shows Florida Keys RevPAR up 12.6% to \$272.71, with both rate and occupancy higher year over year. Vacation rentals are pacing 8.8% ahead for the summer, and forward hotel occupancy runs flat to modestly ahead through August.

MAY REVPAR · FLORIDA KEYS

\$272.71

▲ 12.6% vs LY

ADR \$345.83 · Occ 78.9%

MAY REVPAR · KEY WEST

\$287.95

▲ 10.9% vs LY

ADR \$347.77 · Occ 82.8%

VACATION RENTAL REVENUE

\$19.6M

▲ 8.8% vs LY

May–Aug on the books

HOTEL PERFORMANCE

Source: STR/CoStar · May 1-30 daily data, preliminary

- ◆ **Florida Keys RevPAR \$272.71, up 12.6%.** ADR rose 6.1% to \$345.83 and occupancy reached 78.9%, up from 74.2%.
- ◆ **Key West RevPAR \$287.95, up 10.9%.** ADR was \$347.77 at 82.8% occupancy, with \$47.3M in revenue for the month.

HOTEL FORWARD OUTLOOK

Source: TravelClick D360 · as of May 31

JUNE	JULY	AUGUST
+0.1%	+4.3%	+1.6%
Occ	Occ	Occ

- ◆ **All three summer months are pacing at or above last year** on committed occupancy, with July the strongest at up 4.3%.
- ◆ **Pace is steady, not accelerating.** Single-digit gains with no softening in the forward booking window.

VACATION RENTAL PACING

Source: Key Data · as of 6/7 vs same point LY

MAY	JUNE	JULY	AUGUST
+7%	+6%	+15%	+9%
\$6.3M	\$5.7M	\$5.1M	\$2.5M

- ◆ **\$19.6M on the books for May through August**, up 8.8% (+\$1.6M) over the same point last year.
- ◆ **Every summer month is pacing ahead of last year**, with July strongest at up 15%.