

# June 29, 2026

## THE BOTTOM LINE

June 14–20 weekly hotel data shows rate-driven growth across the Keys. ADR climbed over 9% in both Florida Keys and Key West, while occupancy was slightly below last year. Vacation rental revenue for June is pacing 19.4% ahead of last year.

### JUNE 14–20 REVPAR · FLORIDA KEYS

**\$252.34**

▲ 8.1% vs LY

ADR \$324.72 · Occ 77.7%

### JUNE 14–20 REVPAR · KEY WEST

**\$252.30**

▲ 8.3% vs LY

ADR \$316.48 · Occ 79.7%

### VACATION RENTAL REVENUE

**\$5.64M**

▲ 19.4% vs LY

June on the books

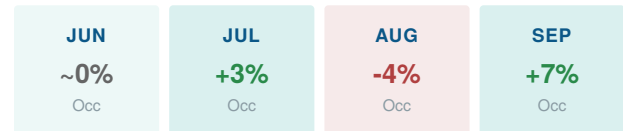
## HOTEL PERFORMANCE

Source: STR/CoStar · weekly · June 14–20

- ◆ **Rate carried the week.** Florida Keys ADR reached \$324.72, up 9.6% over last year. Key West ADR reached \$316.48, up 9.0%.
- ◆ **Occupancy was slightly below last year** in both markets, down 1.4% in Florida Keys and 0.7% in Key West, while RevPAR still grew over 8% in both.

## FORWARD OUTLOOK

Source: TravelClick D360 · as of 6/14

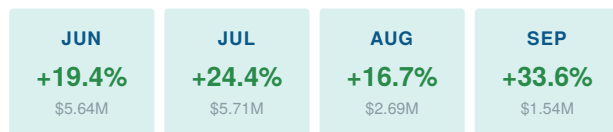


- ◆ **August is the soft point.** Occupancy, ADR, and RevPAR all pace below last year, with RevPAR the weakest of the four months.
- ◆ **September pacing is well ahead** of last year across occupancy, ADR, and RevPAR.

*This week's D360 export has a data quality issue and is still being verified. The figures above are the most recent confirmed data, as of June 14.*

## VACATION RENTAL PACING

Source: Key Data · as of 6/29 vs same point LY



- ◆ **\$5.64M on the books for June**, up 19.4% over the same point last year.
- ◆ **July is also tracking ahead** of last year. August and September are a smaller share of total inventory booked at this point, so those figures carry less weight.

## MARKET CONTEXT

Source: Tourism Economics · June 2026

### WHAT IT IS

Tourism Economics is a research firm that tracks national and global travel demand trends, used here as a national backdrop for our local results.

US hotel demand has posted positive year-over-year growth every month of 2026, a useful signal for whether the rate growth we're seeing locally lines up with broader demand.

**+1.8%**

US hotel demand, YTD through May, positive every month of 2026

**-4.8%**

Overseas arrivals to the US, YTD through May