WEEKLY PERFORMANCE SNAPSHOT

July 6, 2026

The Florida Keys & Key West

MONROE COUNTY TDC

THE BOTTOM LINE

June 21–27 daily hotel data showed RevPAR up 5.9% in the Florida Keys and 5.2% in Key West. Vacation rentals are pacing well for July, up 24.1% over last year, while D360 forward data show August occupancy down 2.0% ahead of a stronger September.

JUNE 21–27 REVPAR · FLORIDA KEYS	JUNE 21–27 REVPAR · KEY WEST	VACATION RENTAL REVENUE
$220.79	**$215.23**	**$5.9M**
▲5.9% vs LY	▲5.2% vs LY	▲24.1% vs LY
ADR $286.88 · Occ 77.0%	*ADR $274.48 · Occ 78.4%*	*July on the books*

HOTEL PERFORMANCE

Source: STR/CoStar · weekly · 6/21–6/27

- **Florida Keys RevPAR rose 5.9% to $220.79.** Occupancy was up 3.2% and ADR up 2.6% year over year.
- **Key West RevPAR rose 5.2% to $215.23.** Occupancy led the gain, up 4.1%, with ADR up 1.0%.

HOTEL FORWARD OUTLOOK

Source: TravelClick D360 · as of 6/28

JUL	AUG	SEP	OCT
+10.1%	–2.0%	+8.8%	+5.1%
Occ	Occ	Occ	Occ

- **August occupancy is down 2.0%** year over year, the only month in the outlook showing a decline.
- **September and October are early stage.** Both show solid gains, but the booking window is still filling in.

VACATION RENTAL PACING

Source: Key Data · as of 7/3 vs 7/5 LY

JUL	AUG	SEP	OCT
+24.1%	+15.2%	+34.1%	+23.7%
$5.9M	$2.7M	$1.6M	$2.4M

- **$5.9M on the books for July,** up 24.1% over the same point last year, the most complete month in this window.
- **September's 34.1% gain is on a smaller booking base than July,** about 11% of nights booked to date. More bookings will fill in before it's a clear trend.

MARKET CONTEXT

Source: AAA Travel · Independence Day forecast, 2026

72.2M
Americans traveling for July 4th week, a new US record

4-yr high
Gas prices this holiday week, yet 85% still drove to their destination

2 of 10
Miami and Fort Lauderdale rank on AAA's top 10 domestic destinations list

+5.3%
YoY growth in cruise, bus, and train travel, the fastest growing mode

FLORIDA KEYS HOTEL FORECAST

Source: Tourism Economics, June 2026 update

The June Tourism Economics forecast is in. The update revised the Keys' 2026 outlook up across every metric versus the March forecast, even as Oxford Economics flags slower national GDP growth and gas prices at four-year highs as headwinds to watch nationally. Full report: visitfloridakeys.com

$1.08B
Projected 2026 Keys hotel room revenue, up 8.1%, revised up from a 6.7% March estimate

+7.5%
Projected 2026 RevPAR growth, revised up from 5.7% in March