

July 13, 2026

June 28–July 4 hotel data · July–October forward outlook · vacation rental pacing as of 7/9 · market context

The Florida Keys & Key
West

MONROE COUNTY TDC

THE BOTTOM LINE

For June 28–July 4, hotel RevPAR was up 1.8% in the Florida Keys and down 0.7% in Key West versus last year, while vacation rental bookings for the July–October window are pacing 23.1% ahead of last year as of July 9. Nationally, concern about fuel costs is climbing, a trend worth watching given the Keys' reliance on drive-market visitors.

6/28–7/4 REVPAR · FLORIDA KEYS

\$245.51

▲ 1.8% vs LY

ADR \$318.49 · Occ 77.1%

6/28–7/4 REVPAR · KEY WEST

\$234.20

▼ 0.7% vs LY

ADR \$297.93 · Occ 78.6%

VACATION RENTAL REVENUE

\$13.1M

▲ 23.1% vs LY

July–October on the books

HOTEL PERFORMANCE

Source: STR/CoStar · weekly · 6/28–7/4

- ◆ **Florida Keys occupancy was 77.1%**, up 2.9 points over last year. ADR was \$318.49, down 1.1%; RevPAR was \$245.51, up 1.8%.
- ◆ **Key West occupancy was 78.6%**, up 2.4 points over last year. ADR was \$297.93, down 3.0%; RevPAR was \$234.20, down 0.7%.

FORWARD OUTLOOK

Source: TravelClick D360 · as of 7/5

JUL	AUG	SEP	OCT
+8.9%	+4.4%	+19.9%	+1.7%
Occ	Occ	Occ	Occ

- ◆ **Every month July through October is pacing above last year on occupancy.**
- ◆ **October is the softest month at +1.7%**, with more booking activity still to come.

VACATION RENTAL PACING

Source: Key Data · as of 7/9 vs same point LY (7/11)

JUL	AUG	SEP	OCT
+23.4%	+15.1%	+32.1%	+26.7%
\$6.1M	\$2.9M	\$1.6M	\$2.5M

- ◆ **\$13.1M on the books** for July–October, up \$2.5M (+23.1%) over the same point last year.
- ◆ **Every month in the window is pacing ahead of last year**, led by September at +32.1%. Average daily rate is pacing at \$490, up from \$441.

MARKET CONTEXT: FUEL COSTS

Source: Future Partners, June 2026 edition

74.3% of American travelers are concerned fuel costs will affect summer travel	34.2% say gas prices have already kept them from traveling more, up from 12.0% in 2022
38.0% plan to take fewer trips this summer specifically due to fuel costs	\$4.15 national average price per gallon, per AAA