WEEKLY PERFORMANCE SNAPSHOT

July 20, 2026

June 2026 monthly STR data (calendar year) · July–October D360 forward outlook · vacation rental pacing

The Florida Keys & Key West

MONROE COUNTY TDC

THE BOTTOM LINE

June 2026 monthly STR data shows Florida Keys RevPAR up 1.0% and Key West RevPAR up 2.1% year over year. Vacation rentals have $13.8M on the books for July through October, up 39.5% over the same point last year, with every month in the window pacing ahead.

JUNE REVPAR · FLORIDA KEYS	JUNE REVPAR · KEY WEST	VACATION RENTAL REVENUE
$217.48	**$217.48**	**$13.8M**
▲1.0% vs LY	▲2.1% vs LY	▲39.5% vs LY
ADR $290.13 · Occ 75.0%	*ADR $283.16 · Occ 76.8%*	*July–October on the books*

HOTEL PERFORMANCE

Source: STR/CoStar · monthly · June 2026

- **Florida Keys RevPAR up 1.0% in June,** to $217.48, on ADR growth of 1.2% to $290.13. Occupancy was essentially flat at 75.0%, down 0.2 points.
- **Key West RevPAR up 2.1%,** to $217.48, with ADR up 1.3% to $283.16 and occupancy up 0.8 points to 76.8%.
- **Calendar year to date, Florida Keys RevPAR is up 10.0%** to $343.69, on 6.6% ADR growth. Key West YTD RevPAR is up 8.9% to $367.36.

HOTEL FORWARD OUTLOOK

Source: TravelClick D360 · as of 7/12

JUL	AUG	SEP	OCT
+10.0%	+5.9%	+19.2%	+2.2%
Occ	Occ	Occ	Occ

- **Committed occupancy is pacing ahead of last year in every month, July through October.** September currently shows the strongest gain at +19.2%.
- **Total 2026 committed occupancy for Monroe County is 42.4%,** up 8.9 points year over year as of July 12.

VACATION RENTAL PACING

Source: Key Data · as of 7/19 vs same point LY (7/20)

JUL	AUG	SEP	OCT
+41.1%	+32.9%	+51.3%	+37.0%
$6.39M	$3.07M	$1.74M	$2.59M

- **$13.8M on the books for July through October,** up $3.9M (+39.5%) over the same point last year.
- **Every month in the window is pacing ahead of last year,** led by September at +51.3%. Average daily rate is pacing at $483, up from $468 (+3.2%).

REGIONAL MARKET BENCHMARKING

Source: Amadeus D360 · as of 7/12 · YoY occupancy change vs STLY

MARKET	JUL	AUG	SEP
Monroe County	+9.9%	+4.8%	+14.5%
Ft Lauderdale	+2.9%	+0.8%	+22.8%
Miami	-2.5%	-10.8%	+10.2%
Palm Beach	+7.2%	+26.6%	+39.4%
Sarasota	+1.9%	+10.9%	+16.1%
Puerto Rico	+9.3%	-12.6%	-24.1%
US Virgin Islands	+9.1%	+41.5%	+67.5%
Bahamas	+7.4%	+17.1%	+51.6%
Dominican Republic	+11.5%	+6.2%	+9.5%

- **Monroe County is positive across all three months** and leads the South Florida mainland markets in July and August, though Ft Lauderdale and Palm Beach both overtake it by September.
- **Puerto Rico is the outlier,** moving from +9.3% in July to -24.1% by September, the only market in the set to turn negative. The Bahamas and US Virgin Islands show the steepest acceleration into September, at +51.6% and +67.5%.