The Florida Keys & Key West come as you are®

Monthly Summary Report

June 2026

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Executive Summary

June 2026

Highlights

Hotel performance remained steady in June as demand was essentially unchanged (-0.3% YOY) and ADR increased 1.2% to $290, lifting revenue 0.9% YOY to $70.3M, the ninth consecutive month of revenue growth. Budget and Economy hotels recorded demand growth, while Midscale and Luxury hotels saw declines.

Short-term rental performance remained strong in June, with ADR increasing 9.0% from $423 to $461 and RevPAR rising 12.9% from $170 to $192. Total revenue increased 21.9% year over year, reaching $5.76 million.

Other tourism indicators remained positive. TSA checkpoint volume at EYW increased 8.6% YOY, outperforming statewide throughput, which declined 0.7%. Website sessions increased 41.4% YOY, with the "Summer" campaign accounting for 25.4% of sessions and "Keysseasontosave" generating 7.4%.

The USTA Travel Price Index declined 2.0% in June month-over-month, marking the largest monthly drop in four years. Despite the decrease, the U.S. Travel Price Index remained 8.1% above year-ago levels, reflecting elevated prices for gas and airfares, both more than 25% higher than a year ago.

U.S. hotel performance remained strong in June, as ADR growth (+6.7% YOY) and demand outpacing new supply drove RevPAR up 8.4% despite only modest occupancy gains (+1.6%). Luxury hotels led performance (+15.1% RevPAR), while every chain scale posted YOY RevPAR growth.

Hotel Demand
242.4K
-0.3% YOY

Hotel ADR
$290.13
+1.2% YOY

Hotel RevPAR
$217.48
+1.0% YOY

EYW Checkpoint Volume
70.6K
+8.6% YOY

Website Sessions
702.7K
+41.4% YOY

Sources: STR, Azira (formerly Near), TSA, Transunion, Sprout Social, Google Analytics, and Bureau of Labor Statistics

Hotel Review

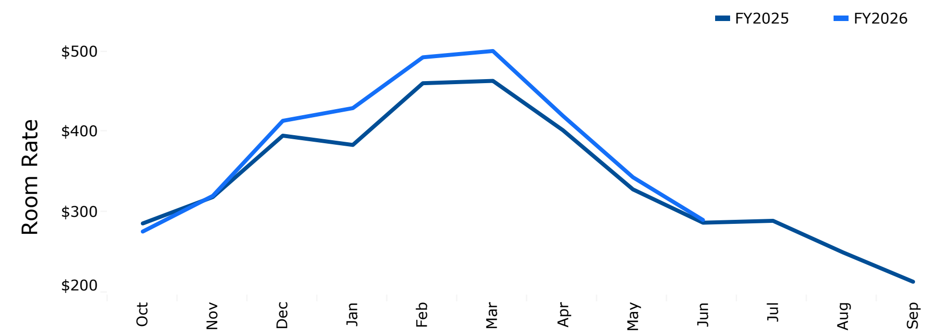
Monthly Performance by Market

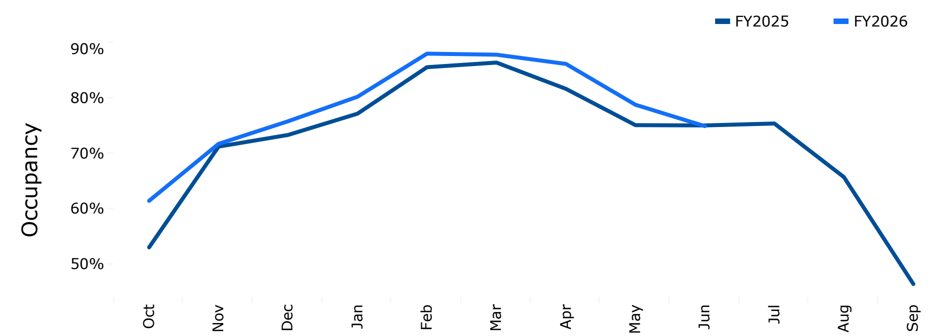
		OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Apr	Florida Keys	86.2%	+5.5%	$420	+4.4%	$362	+10.2%
	Islamorada+	85.5%	+12.6%	$490	+9.5%	$419	+23.2%
	Key Largo, FL+	82.0%	+0.2%	$365	+1.5%	$299	+1.8%
	Key West, FL	89.6%	+4.4%	$421	+4.4%	$378	+9.0%
	Marathon+	80.6%	+6.7%	$389	+0.2%	$314	+6.8%
	Upper Florida Keys	82.6%	+6.8%	$418	+4.5%	$345	+11.5%
May	Florida Keys	78.8%	+4.9%	$343	+4.6%	$271	+9.7%
	Islamorada+	78.0%	+10.8%	$401	+10.2%	$313	+22.1%
	Key Largo, FL+	74.9%	+1.6%	$307	+2.4%	$230	+4.0%
	Key West, FL	82.7%	+4.0%	$345	+3.9%	$285	+8.1%
	Marathon+	72.2%	+4.6%	$301	+1.5%	$217	+6.2%
	Upper Florida Keys	74.9%	+5.9%	$341	+5.4%	$256	+11.6%
Jun	Florida Keys	75.0%	-0.2%	$290	+1.2%	$217	+1.0%
	Islamorada+	71.1%	-2.3%	$330	+2.9%	$234	+0.5%
	Key Largo, FL+	72.0%	-4.2%	$264	-3.5%	$190	-7.6%
	Key West, FL	76.8%	+0.8%	$283	+1.3%	$217	+2.1%
	Marathon+	75.0%	+0.6%	$291	+3.0%	$218	+3.6%
	Upper Florida Keys	73.1%	-1.2%	$298	+1.1%	$217	-0.2%

Fiscal Year-to-Date Performance

Florida Keys

Occupancy	ADR	RevPAR	Supply	Demand	Revenue
78.3%	**$393**	**$308**	**2.9M**	**2.3M**	**$903.0M**
+3.9%	+5.0%	+9.1%	+0.0%	+3.9%	+9.1%





Source: STR

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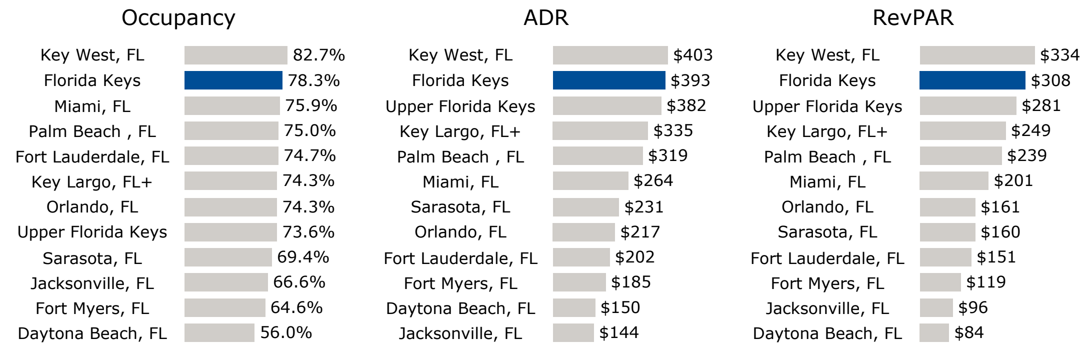
Hotel Competitive Performance

Monthly Performance by Market

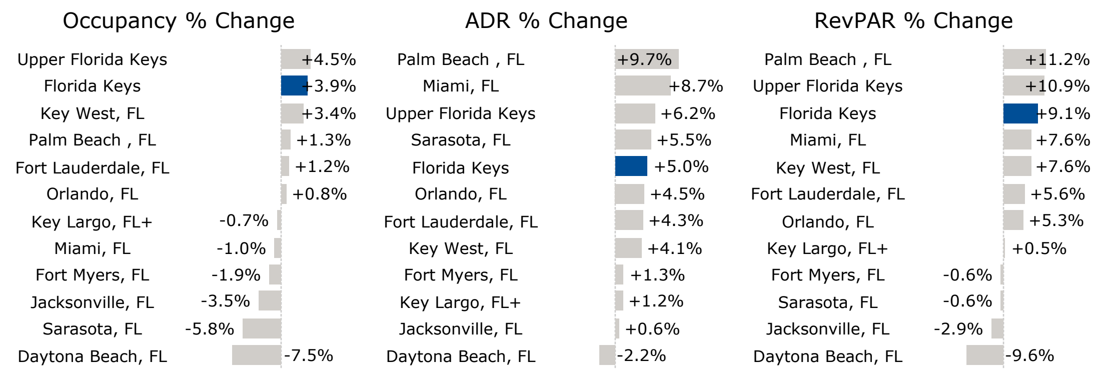
Month	Market	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Apr	Daytona Beach, FL	61.1%	+0.1%	$163	+0.2%	$99	+0.3%
	Florida Keys	86.2%	+5.5%	$420	+4.4%	$362	+10.2%
	Fort Lauderdale, FL	77.0%	+2.0%	$211	+4.8%	$162	+6.8%
	Fort Myers, FL	67.8%	+5.1%	$196	+1.9%	$133	+7.1%
	Jacksonville, FL	71.0%	+1.1%	$156	+1.6%	$110	+2.7%
	Key Largo, FL+	82.0%	+0.2%	$365	+1.5%	$299	+1.8%
	Key West, FL	89.6%	+4.4%	$421	+4.4%	$378	+9.0%
	Miami, FL	78.8%	-2.3%	$283	+12.5%	$223	+9.8%
	Orlando, FL	77.3%	+5.8%	$235	+4.8%	$182	+10.9%
	Palm Beach , FL	75.1%	+1.7%	$343	+9.1%	$257	+11.0%
	Sarasota, FL	72.9%	+2.2%	$259	+5.0%	$189	+7.4%
	Upper Florida Keys	82.6%	+6.8%	$418	+4.5%	$345	+11.5%
May	Daytona Beach, FL	59.8%	-3.1%	$159	-3.9%	$95	-6.9%
	Florida Keys	78.8%	+4.9%	$343	+4.6%	$271	+9.7%
	Fort Lauderdale, FL	69.9%	-0.8%	$180	+5.2%	$125	+4.4%
	Fort Myers, FL	58.6%	+0.8%	$159	+1.3%	$93	+2.1%
	Jacksonville, FL	67.4%	-2.4%	$147	+0.2%	$99	-2.2%
	Key Largo, FL+	74.9%	+1.6%	$307	+2.4%	$230	+4.0%
	Key West, FL	82.7%	+4.0%	$345	+3.9%	$285	+8.1%
	Miami, FL	70.4%	-1.8%	$245	+11.5%	$173	+9.5%
	Orlando, FL	71.4%	+2.9%	$207	+3.7%	$147	+6.8%
	Palm Beach , FL	68.8%	+0.6%	$252	+6.2%	$173	+6.8%
	Sarasota, FL	69.7%	+7.0%	$206	+5.1%	$143	+12.5%
	Upper Florida Keys	74.9%	+5.9%	$341	+5.4%	$256	+11.6%
Jun	Daytona Beach, FL	59.9%	+2.1%	$133	-5.9%	$80	-3.9%
	Florida Keys	75.0%	-0.2%	$290	+1.2%	$217	+1.0%
	Fort Lauderdale, FL	67.0%	-2.5%	$163	+5.5%	$109	+2.9%
	Fort Myers, FL	56.6%	+1.1%	$153	-0.2%	$86	+0.9%
	Jacksonville, FL	68.3%	+4.1%	$142	+0.4%	$97	+4.5%
	Key Largo, FL+	72.0%	-4.2%	$264	-3.5%	$190	-7.6%
	Key West, FL	76.8%	+0.8%	$283	+1.3%	$217	+2.1%
	Miami, FL	65.2%	-7.7%	$218	+23.2%	$142	+13.6%
	Orlando, FL	70.3%	-4.5%	$198	+0.0%	$139	-4.4%
	Palm Beach , FL	67.5%	+3.6%	$215	+10.8%	$145	+14.8%
	Sarasota, FL	69.4%	+1.3%	$202	+4.5%	$140	+5.9%
	Upper Florida Keys	73.1%	-1.2%	$298	+1.1%	$217	-0.2%

Fiscal Year-to-Date Performance

Performance by Market



% Change vs. Previous Year



Source: STR

Preliminary Hotel Performance

Preliminary July 2026 Hotel Performance

Florida Keys

Occupancy	ADR	RevPAR
79.0%	**$284**	**$224**
+4.1%	+1.8%	+6.0%

Hotel Performance by Market

	Occupancy		ADR		RevPAR	
Florida Keys	79.0%	+4.1%	$284	+1.8%	$224	+6.0%
Daytona Beach, FL	64.0%	+0.4%	$138	-2.4%	$88	-1.9%
Florida Central North	56.4%	+2.2%	$104	-3.5%	$59	-1.3%
Florida Central South	57.1%	+2.0%	$126	+2.8%	$72	+4.9%
Florida Panhandle	74.6%	+2.5%	$205	+5.1%	$153	+7.8%
Fort Myers, FL	58.9%	+4.1%	$139	+0.9%	$82	+5.0%
Jacksonville, FL	71.0%	+4.0%	$141	+2.4%	$100	+6.5%
Key West	80.8%	+4.2%	$275	+1.2%	$223	+5.6%
Key West, FL	80.8%	+4.2%	$275	+1.2%	$223	+5.6%
Melbourne, FL	71.1%	+2.1%	$140	-1.5%	$99	+0.7%
Miami, FL	66.6%	-5.3%	$209	+23.3%	$139	+16.6%
Monroe Cty Ex Key West+	77.2%	+3.8%	$288	+2.9%	$223	+6.6%
Orlando, FL	70.8%	+0.0%	$185	+6.3%	$131	+6.2%
Palm Beach , FL	65.7%	+6.8%	$198	+12.0%	$130	+19.4%
Sarasota, FL	65.9%	-1.2%	$180	+3.6%	$119	+2.4%

Preliminary July 2026 by Day-of-Week

Week Days

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Florida Keys	74.0%	+4.2%	$259	+0.6%	$192	+4.7%
Daytona Beach, FL	60.7%	+1.4%	$130	-2.7%	$79	-1.0%
Florida Central North	54.1%	+2.0%	$100	-3.5%	$54	-1.6%
Florida Central South	54.6%	+2.0%	$120	+2.1%	$66	+4.2%
Florida Panhandle	70.8%	+2.1%	$190	+3.2%	$135	+5.4%
Fort Myers, FL	56.3%	+3.2%	$134	+2.3%	$76	+5.5%
Jacksonville, FL	68.6%	+2.9%	$135	+2.2%	$93	+5.2%
Key West, FL	76.0%	+3.9%	$251	-0.6%	$191	+3.4%
Melbourne, FL	67.8%	+2.6%	$131	-1.4%	$89	+1.2%
Miami, FL	62.1%	-5.6%	$182	+17.2%	$113	+10.5%
Orlando, FL	67.2%	-0.6%	$182	+5.9%	$123	+5.2%
Palm Beach , FL	63.9%	+8.0%	$191	+13.7%	$122	+22.6%
Sarasota, FL	61.7%	-0.8%	$170	+4.2%	$105	+3.4%

Week Ends

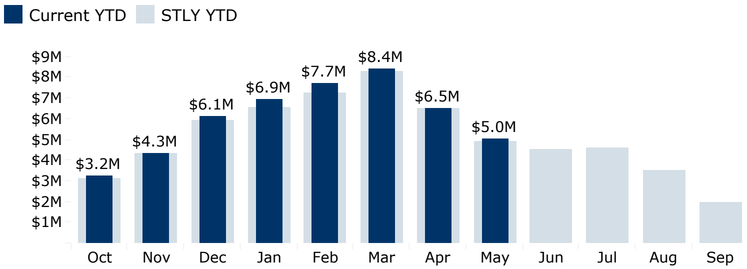
	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Florida Keys	91.6%	+4.1%	$334	+3.8%	$306	+8.1%
Daytona Beach, FL	72.2%	-1.6%	$154	-1.9%	$112	-3.4%
Florida Central North	62.3%	+2.7%	$113	-3.5%	$70	-0.9%
Florida Central South	63.6%	+1.9%	$138	+4.2%	$88	+6.2%
Florida Panhandle	83.9%	+3.5%	$236	+8.3%	$198	+12.2%
Fort Myers, FL	65.4%	+5.9%	$150	-1.8%	$98	+4.0%
Jacksonville, FL	77.2%	+6.5%	$153	+2.5%	$118	+9.2%
Key West, FL	93.0%	+5.0%	$325	+4.0%	$303	+9.3%
Melbourne, FL	79.2%	+1.2%	$158	-1.4%	$125	-0.3%
Miami, FL	78.0%	-4.9%	$260	+32.5%	$204	+26.2%
Orlando, FL	79.8%	+1.3%	$190	+6.8%	$152	+8.3%
Palm Beach , FL	70.0%	+4.0%	$213	+9.0%	$149	+13.4%
Sarasota, FL	76.6%	-1.9%	$201	+2.7%	$154	+0.8%

Note: Includes daily data through 7/25/2026
Source: STR

The Florida Keys & Key West Hotel Occ Tax Collections

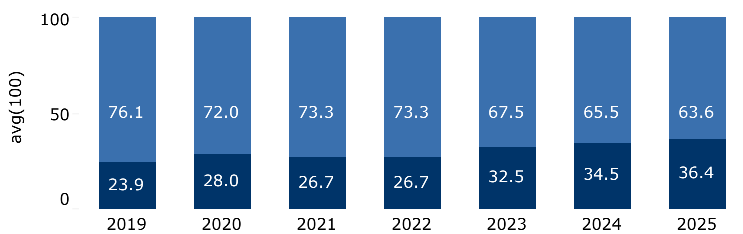
Hotel Occ Tax Tax Collections by Month

Fiscal Year 2026 | Location: All



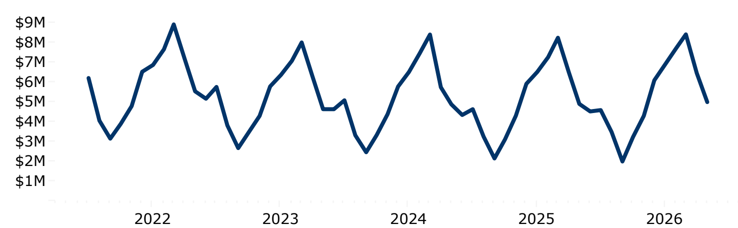
Bed Tax Contribution

Fiscal Year | Non - STR | STR



Hotel Occ Tax Tax Collections

Long Term Trend | Location: All



Oct 2025 - May 2026 Collections

$48.2M

+2.9% YOY

Hotel Occ Tax Tax Collections by Month

Fiscal Year 2026

	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	YTD
District I	$1.8M	$2.3M	$2.9M	$3.4M	$3.7M	$3.8M	$3.0M	$2.4M					$23.3M
District II	$256.4K	$364.7K	$525.2K	$692.8K	$676.0K	$692.3K	$506.1K	$415.6K					$4.1M
District III	$409.3K	$600.3K	$1.1M	$1.2M	$1.4M	$1.6M	$1.1M	$814.8K					$8.2M
District IV	$315.9K	$430.1K	$653.4K	$679.1K	$820.9K	$980.1K	$780.0K	$606.9K					$5.3M
District V	$470.4K	$622.2K	$917.3K	$980.8K	$1.2M	$1.4M	$1.0M	$797.7K					$7.4M
Total	$3.2M	$4.3M	$6.1M	$6.9M	$7.7M	$8.4M	$6.5M	$5.0M					$48.2M

Change vs. Previous Year

	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	YTD
District I	+1.1%	-1.5%	+2.5%	+3.9%	+6.8%	+2.4%	-1.0%	+3.7%					+2.5%
District II	+14.9%	+12.3%	-1.7%	+9.5%	+6.0%	+0.2%	-9.3%	+1.5%					+3.0%
District III	+1.8%	-3.2%	+3.0%	+7.8%	+8.0%	-1.7%	+0.8%	-5.9%					+1.7%
District IV	+19.1%	+10.4%	+6.5%	+15.7%	+11.0%	+5.9%	+5.9%	+11.3%					+9.7%
District V	+0.6%	-5.0%	+5.0%	+2.0%	-0.7%	+3.9%	-1.3%	-1.0%					+0.8%
Total	+3.7%	-0.2%	+3.0%	+5.9%	+6.2%	+2.1%	-0.7%	+1.9%					+2.9%

Source: The Florida Keys & Key West

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Airport TSA Checkpoint Volume & Visitor Origins

EYW - Key West International

Monthly TSA Checkpoint Volume

June 2026 Volume

70.6K

+8.6% YOY

Year-to-Date TSA Checkpoint Volume & Visitor Origins

Oct 2025 - Jun 2026 Volume

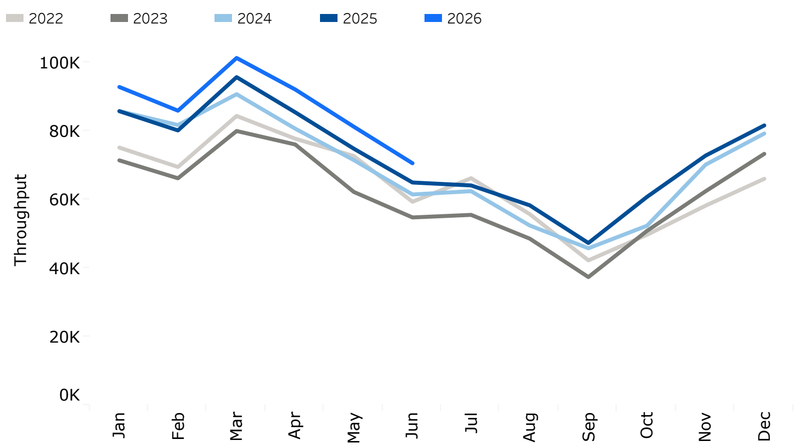
739.3K

+6.9% YOY

Source: Transportation Security Administration

TSA Checkpoint Volume by Month

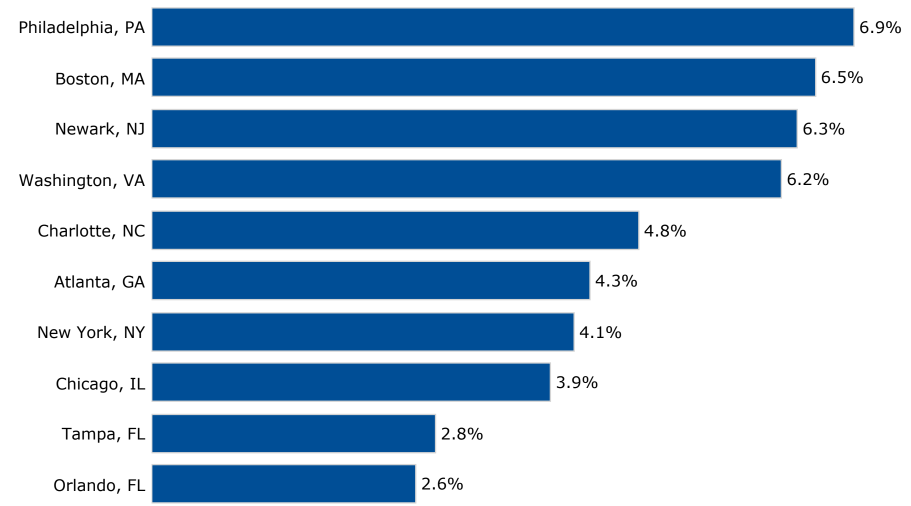
Last Five Calendar Years



Source: Transportation Security Administration

Top Origin Markets - Air

Oct 2025 - Jun 2026 Visitor Arrivals



Source: OAG

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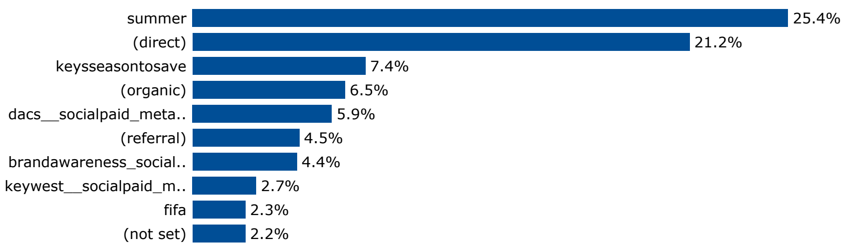
Website Performance Summary

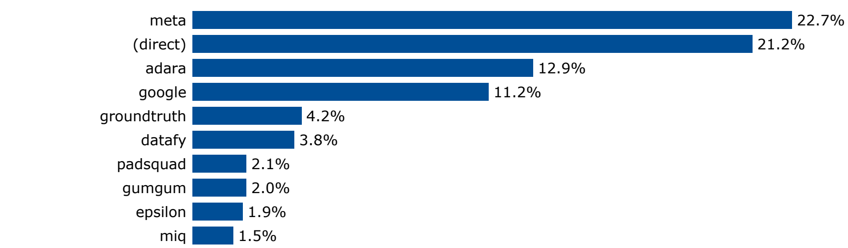
June 2026 | Properties: 321274354

Users	Sessions	Engaged Sessions	Engagement Rate	Page Views	Pages Per Session	Avg. Session Duration	Bounce Rate
654.0K	702.7K	332.6K	47.3%	965.4K	1.37 pages	00:07:04	52.7%
+46.2% YOY	+41.4% YOY	+6.2% YOY	-15.66% pt YOY	+11.4% YOY	-0.37 pages YOY	-358 sec YOY	+15.66% pt YOY

Campaigns

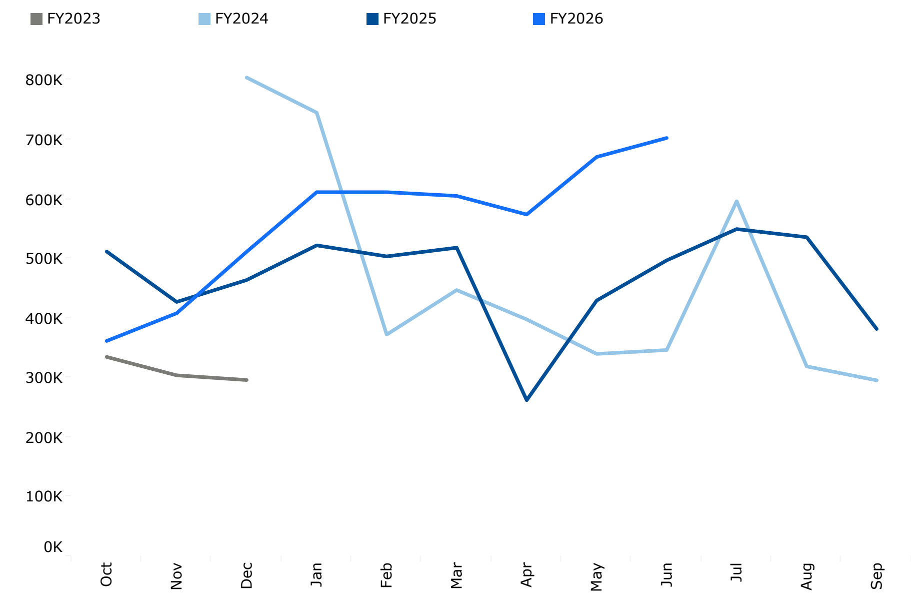


Sources



Sessions Analysis

Monthly Trend

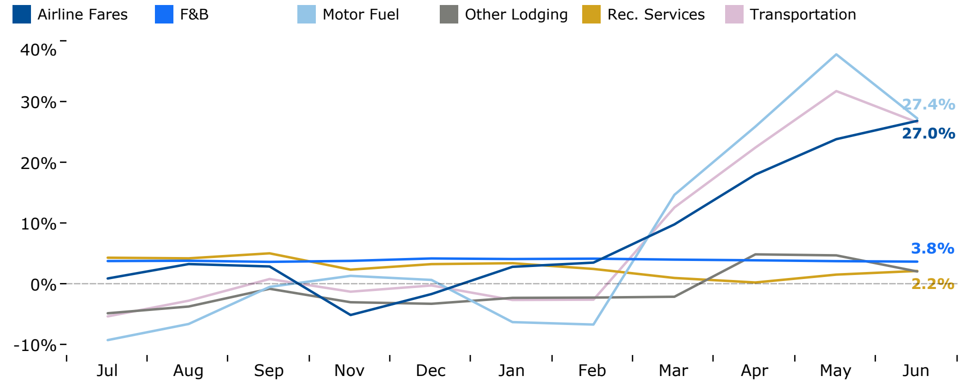


Source: Google Analytics
Note: Due to Google's practice of exporting sampled data to protect user identities, figures may not precisely match data viewed in the Google Analytics platform.

National Travel Trends

Travel Price Index

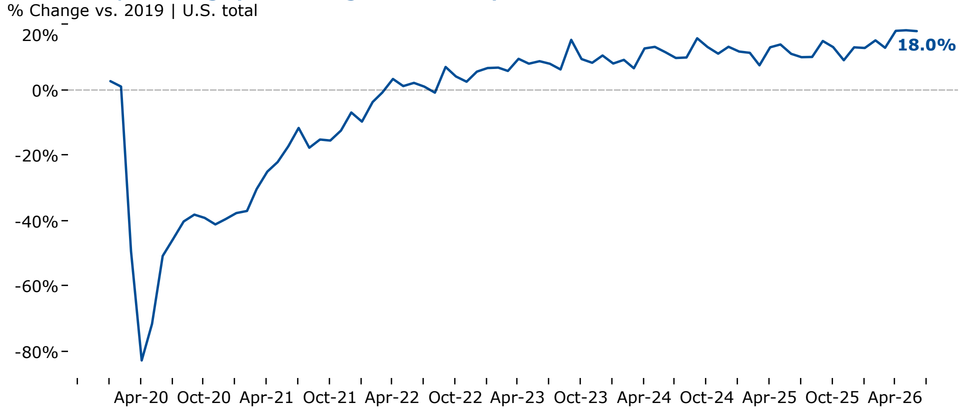
% Change Relative to Same Month in Previous Year | Last 12 Months



Source: U.S. Travel Association via U.S. Travel Recovery Tracker

Travel Spending (% change vs 2019)

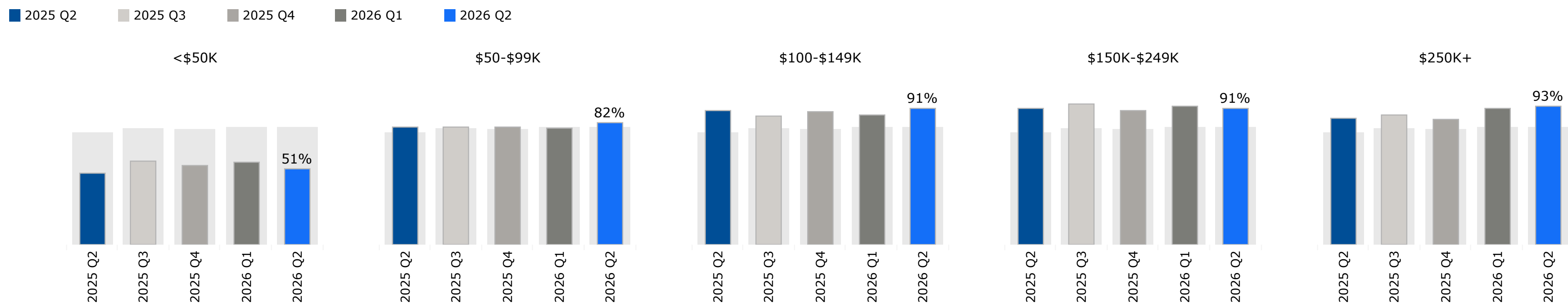
% Change vs. 2019 | U.S. total



Source: Tourism Economics via U.S. Travel Recovery Tracker

Planning Leisure Travel Within the Next 12 Months

% of American Consumers Planning Travel by Household Income (Calendar Year)



Note: Light gray bars represent the average for all survey respondants
Source: MMGY Global's Portait of American Travelers

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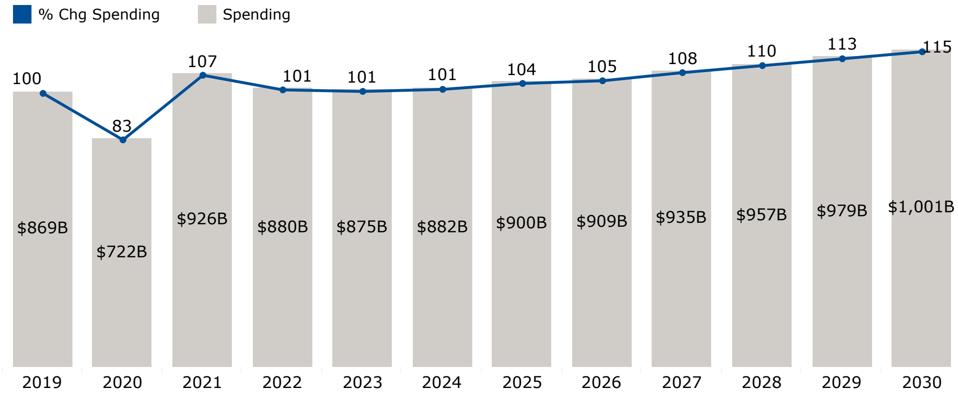
Domestic Travel Forecast

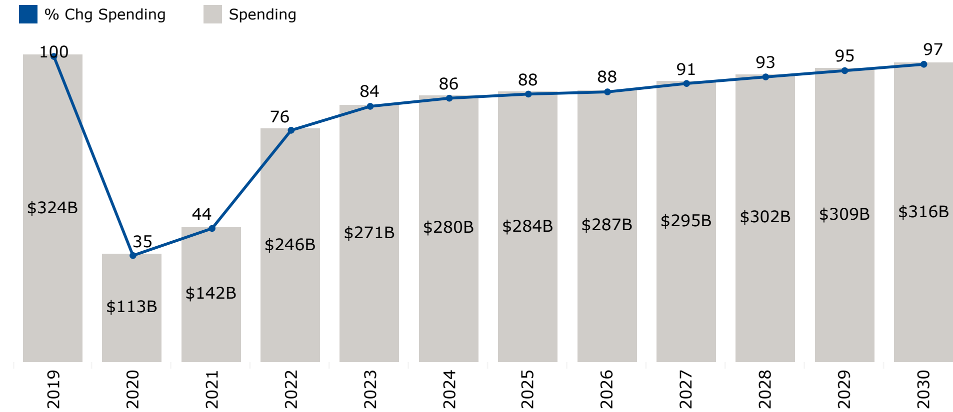
Real Domestic Leisure Travel Spending

Forecasted recovery, relative to 2019 (index, 2019=100)



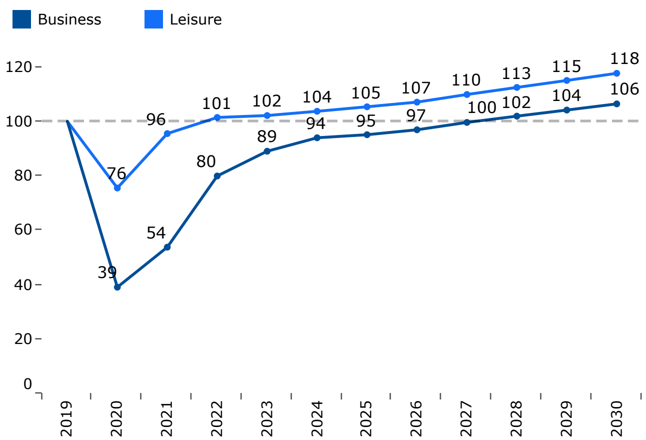
Real Domestic Business Travel Spending

Forecasted recovery, relative to 2019 (index, 2019=100)



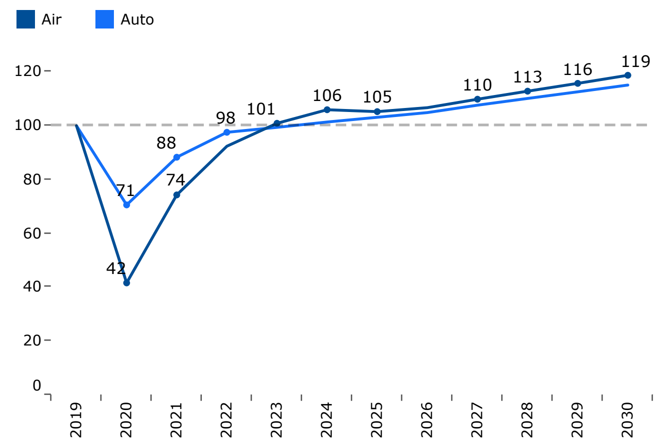
Leisure vs. Business Travel Volume

Forecasted recovery, relative to 2019 (index, 2019=100)



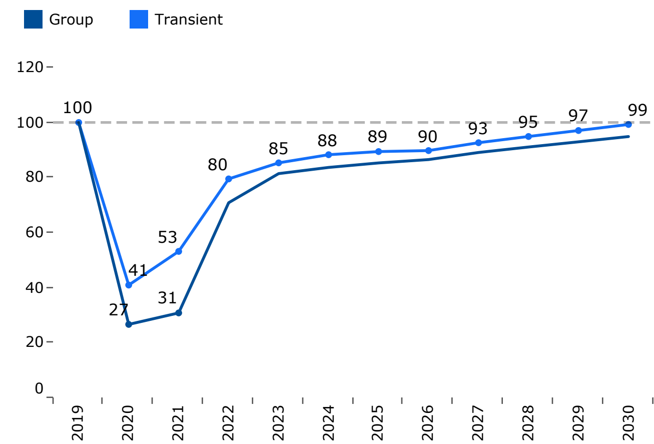
Auto vs. Air Travel Volume

Forecasted recovery, relative to 2019 (index, 2019=100)



Group vs. Transient Travel Spending

Forecasted recovery, relative to 2019 (index, 2019=100)



Forecast as of May 2026
Source: Tourism Economics via U.S. Travel Recovery Tracker

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