WEEKLY PERFORMANCE SNAPSHOT

August 17, 2026

The Florida Keys & Key West
MONROE COUNTY TDC

THE BOTTOM LINE

For the week of August 2-8, hotel RevPAR grew 11.8% in the Florida Keys and 14.7% in Key West year-over-year, both on occupancy gains. Vacation rental revenue on the books for August-November is pacing 15.8% ahead of last year.

AUG 2-8 REVPAR · FLORIDA KEYS	AUG 2-8 REVPAR · KEY WEST	VACATION RENTAL REVENUE
$218.80	**$217.82**	**$15.3M**
▲11.8% vs LY	▲14.7% vs LY	▲15.8% vs LY
ADR $270.09 · Occ 81.0%	*ADR $260.71 · Occ 83.5%*	*Aug-Nov on the books*

HOTEL PERFORMANCE

Source: STR/CoStar · weekly

- **Florida Keys RevPAR $218.80, up 11.8% YoY,** on 81.0% occupancy (+6.2%) and $270.09 ADR (+5.3%). Key West RevPAR reached $217.82, up 14.7% YoY, on 83.5% occupancy (+8.1%) and $260.71 ADR (+6.1%).
- **Calendar year-to-date RevPAR is up 11.3% in the Florida Keys ($325.65) and 10.0% in Key West ($344.15),** both markets ahead of last year on occupancy and rate.

HOTEL FORWARD OUTLOOK

Source: TravelClick D360 · RevPAR YoY (est)

AUG	SEP	OCT	NOV
-0.2%	+27.6%	+13.4%	+27.1%
RevPAR	RevPAR	RevPAR	RevPAR

- **August RevPAR is pacing roughly flat YoY (est),** the softest month in the four-month outlook.
- **September through November all show double-digit YoY RevPAR growth (est),** led by September at +27.6%.

VACATION RENTAL PACING

Source: Key Data · as of 8/16 vs 8/17/25

AUG	SEP	OCT	NOV
+16.3%	+31.3%	+14.3%	+8.8%
$4.5M	$2.6M	$3.6M	$4.5M

- **$15.3M on the books** for August-November, up $2.1M (+15.8%) over same point LY.
- **September shows the steepest pace gain at +31.3%,** while November growth is more moderate at +8.8%.

MARKET CONTEXT

Source: Future Partners, State of the American Traveler, Aug 2026

30.6%
used AI tools for trip planning, up from 23.9% a year ago

36.1%
cite travel as too expensive right now, up from 30.4% a year ago

35.1%
now prefer road trips over air travel, the highest reading in the tracker

10.2 wks
average booking lead time, down from 10.8 wks in July 2025

Sources: STR/CoStar, TravelClick D360, Key Data, Future Partners

PREPARED BY THE MONROE COUNTY TDC