WEEKLY PERFORMANCE SNAPSHOT MONTHLY STR RELEASE

August 24, 2026

July 2026 monthly STR data · Aug–Nov D360 outlook · vacation rental pacing

The Florida Keys & Key West

MONROE COUNTY TDC

THE BOTTOM LINE

July 2026 monthly STR data shows Florida Keys RevPAR up 9.5% and Key West RevPAR up 8.0% year over year. Vacation rentals have $13.1M on the books for August through November, up 16.1% over the same point last year, with every month in the window pacing ahead.

JULY REVPAR · FLORIDA KEYS

$239.38

▲9.5% vs LY

ADR $297.59 · Occ 80.4%

JULY REVPAR · KEY WEST

$234.64

▲8.0% vs LY

ADR $286.44 · Occ 81.9%

VACATION RENTAL REVENUE

$13.1M

▲16.1% vs LY

August–November on the books

HOTEL PERFORMANCE

Source: STR/CoStar · monthly · July 2026

- **Florida Keys RevPAR up 9.5% in July,** to $239.38, on ADR growth of 3.3% to $297.59. Occupancy was up 6.0% to 80.4%.
- **Key West RevPAR up 8.0%,** to $234.64, with ADR up 2.2% to $286.44 and occupancy up 5.7% to 81.9%.
- **Calendar year to date, Florida Keys RevPAR is up 9.9%** to $328.39, on 6.2% ADR growth. Key West YTD RevPAR is up 8.8% to $347.95.

HOTEL FORWARD OUTLOOK

Source: TravelClick D360 · as of 8/16

AUG	SEP	OCT	NOV
+1.8% RevPAR	+29.2% RevPAR	+10.6% RevPAR	+29.2% RevPAR

- **RevPAR (est) is pacing positive across all four months, August through November.** September and November show the strongest gains, both +29.2%.
- **ADR growth builds through the window,** from -3.6% in August to +4.7% in November, while occupancy gains stay in double digits September onward.

RevPAR YoY (est) derived from TravelClick D360 ADR YoY and Occupancy YoY change (RevPAR YoY = (1+ADR YoY) × (1+Occ YoY) − 1). Not a native RevPAR pull.

VACATION RENTAL PACING

Source: Key Data, Unit Revenue (Nightly) · as of 8/22 vs same point LY (8/23)

AUG	SEP	OCT	NOV
+18.9%	+33.2%	+13.9%	+9.6%
$3.80M	$2.25M	$3.04M	$3.99M

- **$13.1M on the books for August through November,** up $1.8M (+16.1%) over the same point last year.
- **Every month in the window is pacing ahead of last year,** led by September at +33.2%.

REGIONAL MARKET BENCHMARKING

Source: Amadeus D360 regional comp set · as of 8/16 · RevPAR YoY change (est) vs STLY

MARKET	AUG	SEP	OCT	NOV
Monroe County	+1.8%	+29.2%	+10.6%	+29.2%
Ft Lauderdale	-1.9%	+12.8%	+4.0%	+3.4%
Miami	-1.8%	+21.0%	+16.0%	+32.7%
Palm Beach	+10.4%	+13.3%	-7.0%	+0.8%
Sarasota	+4.8%	+9.2%	+18.7%	+1.8%
Puerto Rico	-7.0%	-11.5%	-4.1%	+19.7%
US Virgin Islands	+13.1%	+78.7%	-2.5%	+66.0%
Bahamas	+6.3%	+52.7%	+20.5%	-0.3%
Dominican Republic	+8.2%	+13.3%	+27.9%	+9.7%

- **Monroe County posts positive RevPAR growth across all four months,** peaking at +29.2% in September and November.
- **US Virgin Islands and Bahamas show the widest swings in the comp set,** +13.1% to +78.7% and +6.3% to +52.7% respectively.
- **Puerto Rico is the only market with negative months,** down August through October before turning positive at +19.7% in November.

RevPAR YoY (est) derived from TravelClick D360 ADR YoY and Occupancy YoY change by market (RevPAR YoY = (1+ADR YoY) × (1+Occ YoY) − 1). Not a native RevPAR pull.