WEEKLY PERFORMANCE SNAPSHOT

August 3, 2026

The Florida Keys & Key West
MONROE COUNTY TDC

THE BOTTOM LINE

For the week of July 19–25, hotel occupancy ran above 85% in both the Florida Keys and Key West, with RevPAR up 11.6% YoY in each submarket. Vacation rental pacing for August–November stands at $11.8M, up 18.5% over the same point last year.

WEEK OF 7/19–7/25 REVPAR · FLORIDA KEYS
$248.09
▲11.6% vs LY
ADR $290.33 · Occ 85.4%

WEEK OF 7/19–7/25 REVPAR · KEY WEST
$252.11
▲11.6% vs LY
ADR $287.39 · Occ 87.7%

VACATION RENTAL REVENUE
$11.8M
▲18.5% vs LY
Aug–Nov on the books

HOTEL PERFORMANCE

Source: STR/CoStar · week of July 19–25, 2026

- **Florida Keys occupancy reached 85.4%,** up 8.3 points YoY; RevPAR $248.09 (+11.6%), ADR $290.33 (+3.0%).
- **Key West occupancy reached 87.7%,** up 8.0 points YoY; RevPAR $252.11 (+11.6%), ADR $287.39 (+3.3%).
- **Calendar YTD RevPAR** up 11.3% in the Keys and 9.9% in Key West.

FORWARD OUTLOOK · MONROE COUNTY

Source: TravelClick D360 · occupancy YoY change on the books

AUG	SEP	OCT	NOV
+7.6%	+17.4%	+6.8%	+22.1%
Occ	Occ	Occ	Occ

- **Occupancy is pacing ahead of last year** in every month on the books, August through November.
- **November shows the largest gain,** +22.1% YoY, with September also strong at +17.4%.

VACATION RENTAL PACING

Source: Key Data · Monroe County Direct · as of 8/2/2026 vs. LY

AUG	SEP	OCT	NOV
+14.8%	+37.0%	+22.5%	+10.8%
$3.51M	$1.95M	$2.80M	$3.52M

- **$11.8M on the books** for August–November, up $1.84M (+18.5%) over the same point last year.
- **Every month is pacing ahead of last year;** September shows the largest percentage gain (+37.0%) off a smaller base.

MARKET CONTEXT

Source: U.S. Travel Association Insights Dashboard, July 28, 2026

+2.8%
2026 national hotel RevPAR forecast, upgraded from +0.6% in February

37.7%
of consumers say it's a good time to spend on leisure travel, up from 31.6% in May

+7.3%
corporate hotel booking pace for August

+8.6%
corporate hotel booking pace for September

REGIONAL COMP SET · OCCUPANCY YOY

Source: TravelClick D360 comp set · monthly, August–November 2026 vs LY · Florida markets and island markets

MARKET	AUG	SEP	OCT	NOV
Monroe County	+7.6%	+17.4%	+6.8%	+22.1%
Fort Lauderdale	-2.9%	+19.2%	+3.7%	+1.2%
Miami	-7.4%	+14.1%	+4.6%	+12.7%
Palm Beach	+12.6%	+24.5%	-7.6%	-15.2%
Sarasota	+7.0%	+15.5%	+23.8%	+2.2%
Bahamas	+11.0%	+49.8%	+4.0%	-4.2%
Dominican Republic	+12.7%	+7.2%	-1.2%	-8.2%
Puerto Rico	-6.2%	-20.1%	-11.8%	0.0%
US Virgin Islands	+35.2%	+65.8%	+1.8%	+19.7%