WEEKLY PERFORMANCE SNAPSHOT

September 14, 2026

The Florida Keys & Key West

MONROE COUNTY TDC

THE BOTTOM LINE

For the week of August 30 to September 5, Florida Keys RevPAR was $130.34, up 22.6% over last year, with the gain concentrated in the Friday and Saturday of Labor Day weekend that last year's comparable week did not include. Vacation rental revenue on the books for September through November is $10.5M, up 10.3% over the same point last year.

AUG 30 – SEP 5 REVPAR · FLORIDA KEYS

$130.34

▲22.6% vs LY

ADR $261.34 · Occ 49.9%

AUG 30 – SEP 5 REVPAR · KEY WEST

$134.50

▲20.2% vs LY

ADR $253.79 · Occ 53.0%

VACATION RENTAL REVENUE

$10.5M

▲10.3% vs LY

September through November on the books

HOTEL PERFORMANCE

Source: STR/CoStar · weekly, August 30 to September 5, 2026

- **Florida Keys RevPAR $130.34, up 22.6%.** Occupancy 49.9% (up 8.1%) and ADR $261.34 (up 13.4%).
- **Labor Day fell September 7 this year and September 1 last year.** This week captured the Friday and Saturday of the holiday weekend; the same week last year fell after the holiday.
- **The week was weekend driven.** Weekend occupancy was 83.0% against 36.6% on weekdays, with Saturday at 91.3% and ADR $345.61.
- **Calendar year to date RevPAR is up 10.9%** in the Florida Keys at $304.61 and up 9.6% in Key West at $321.38.

FORWARD OUTLOOK

Source: TravelClick D360 · as of September 7, 2026

SEP	OCT	NOV
+25.9%	+10.0%	+24.7%
RevPAR	RevPAR	RevPAR

- **All three forward months are pacing ahead.** September RevPAR is up 25.9% and November is up 24.7% (est).
- **Occupancy is carrying the forward gain.** September occupancy is up 16.3% and November is up 17.5%, with ADR up 9.6% and 7.2%.
- **October is the softest of the three** at 10.0%, on ADR up 3.8% and occupancy up 6.3%.

VACATION RENTAL PACING

Source: Key Data · as of 9/12 vs same point LY (9/13)

SEP	OCT	NOV
+29.5%	+9.2%	+2.2%
$2.6M	$3.4M	$4.4M

- **$10.5M on the books** for September through November, up $1.0M (10.3%) over the same point last year.
- **The gain is concentrated in September,** up 29.5% to $2.6M, while November is close to even at 2.2%.
- **November remains the largest month** at $4.4M on the books, ahead of October at $3.4M.

MARKET CONTEXT

Source: Future Partners, State of the American Traveler · fielded August 17 to 23, 2026

25.2% take spontaneous leisure trips frequently, the highest level in the series

10.3 wks average domestic planning window, down from 11.7 weeks last year

46.6% expect a recession within six months, up from 43.8% last month

29.8% have December trips planned, the highest of any forward month