



Monthly Summary Report

August 2026

Highlights

Florida Keys lodging performance was mixed in August. Hotel occupancy declined 1.8% YOY to 65.1%, while ADR dipped 1.1% to \$245.80 and revenue fell 2.9%.

Key West International Airport recorded 60.3K TSA checkpoint passengers in August, up 3.3% YOY, while fiscal YTD volume reached 870.4K, up a stronger 7.2%. Philadelphia, Newark, Boston, and Washington remained the leading air origin markets, highlighting the continued importance of Northeast and Mid-Atlantic travelers to the Keys.

Website traffic strengthened in August, with 530.0K users (+9.8% YOY), 569.4K sessions (+6.2%), and 309.3K engaged sessions (+4.6%). However, page views declined 9.1% and average session duration fell by 200 seconds. Meta accounted for 47.8% of traffic sources, followed by Google at 22.5%.

USTA's Travel Price Index rose 1.6% in August and was 7.4% higher than last year, driven mainly by motor fuel (+27.9% YOY) and airfares (+23.4% YOY). Elevated prices combined with the August job growth of 162,000 jobs contributed to the Federal Reserve increasing its benchmark interest rate to 4% in September.

U.S. hotel performance moderated in August, with RevPAR growth slowing to 2.0% YOY after six consecutive months above 4%. Upper-upscale hotels led growth at 3.1%, while economy hotels declined 2.4%, reflecting continued market bifurcation.



Hotel Demand
217.6K
-1.8% YOY



Hotel ADR
\$245.80
-1.1% YOY



Hotel RevPAR
\$160.07
-2.9% YOY



EYW Checkpoint Volume
60.3K
+3.3% YOY



Website Sessions
569.4K
+6.2% YOY



Hotel Review

Monthly Performance by Market

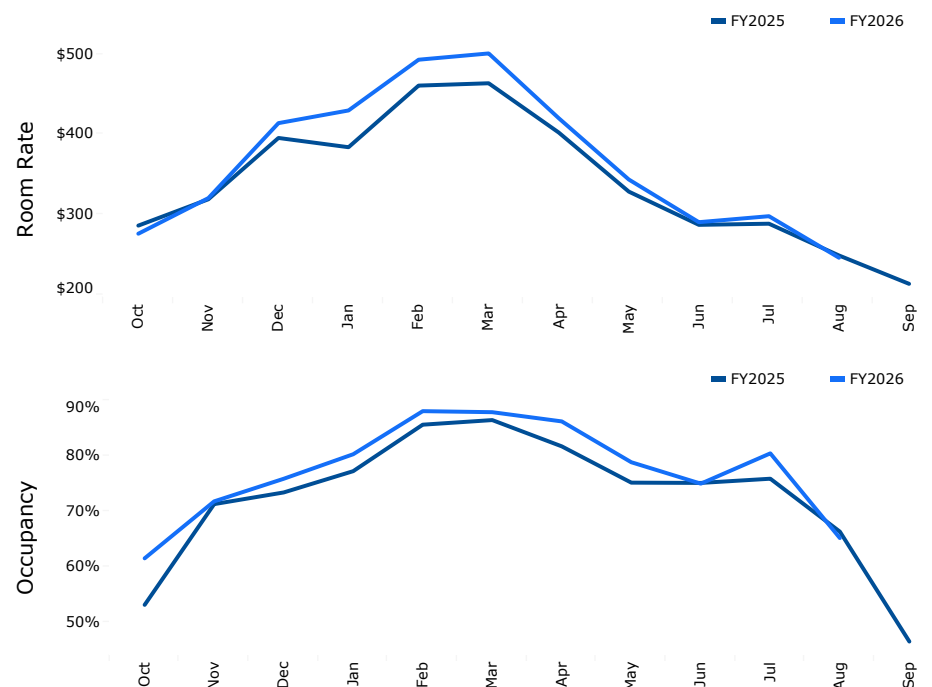
		OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Jun	Florida Keys	75.0%	-0.2%	\$290	+1.2%	\$217	+1.0%
	Islamorada+	77.9%	+7.1%	\$343	+7.0%	\$267	+14.6%
	Key Largo, FL+	72.1%	-4.2%	\$264	-3.5%	\$190	-7.5%
	Key West, FL	76.8%	+0.8%	\$283	+1.3%	\$217	+2.1%
	Marathon+	75.1%	+0.8%	\$290	+2.6%	\$218	+3.4%
	Upper Florida Keys	73.1%	-1.2%	\$298	+1.1%	\$217	-0.2%
Jul	Florida Keys	80.4%	+6.0%	\$298	+3.3%	\$239	+9.5%
	Islamorada+	79.3%	+10.6%	\$348	+7.6%	\$276	+19.0%
	Key Largo, FL+	74.7%	+1.9%	\$276	+0.4%	\$206	+2.2%
	Key West, FL	81.9%	+5.7%	\$286	+2.2%	\$235	+8.0%
	Marathon+	80.0%	+3.4%	\$301	+4.5%	\$241	+8.0%
	Upper Florida Keys	78.9%	+6.4%	\$310	+4.3%	\$244	+11.0%
Aug	Florida Keys	65.1%	-1.8%	\$246	-1.1%	\$160	-2.9%
	Islamorada+	66.6%	+5.4%	\$286	+0.9%	\$191	+6.4%
	Key Largo, FL+	59.9%	-8.0%	\$228	-4.8%	\$137	-12.4%
	Key West, FL	67.1%	-1.6%	\$239	-1.5%	\$160	-3.1%
	Marathon+	62.9%	-2.9%	\$237	-0.3%	\$149	-3.1%
	Upper Florida Keys	63.1%	-1.9%	\$254	-0.8%	\$160	-2.6%

Source: STR

Fiscal Year-to-Date Performance

Florida Keys

Occupancy	ADR	RevPAR	Supply	Demand	Revenue
77.2%	\$373	\$288	3.6M	2.8M	\$1.0B
+3.6%	+4.6%	+8.4%	+0.0%	+3.7%	+8.4%



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Hotel Competitive Performance

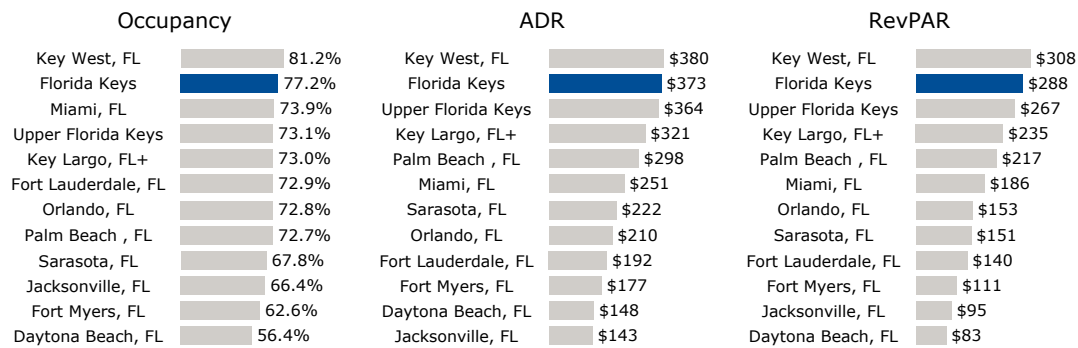
Monthly Performance by Market

		OCC	% CHG	ADR	% CHG	RevPAR	% CHG
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+	72.1%	-4.2%	\$264	-3.5%	\$190	-7.5%
	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%	
Jul	Daytona Beach, FL	63.5%	+1.0%	\$142	-3.7%	\$90	-2.7%
	Florida Keys	80.4%	+6.0%	\$298	+3.3%	\$239	+9.5%
	Fort Lauderdale, FL	66.7%	+0.4%	\$155	+8.4%	\$103	+8.8%
	Fort Myers, FL	58.2%	+2.7%	\$149	+0.3%	\$87	+3.0%
	Jacksonville, FL	70.2%	+3.5%	\$145	+3.0%	\$102	+6.7%
	Key Largo, FL+	74.7%	+1.9%	\$276	+0.4%	\$206	+2.2%
	Key West, FL	81.9%	+5.7%	\$286	+2.2%	\$235	+8.0%
	Miami, FL	66.4%	-4.0%	\$208	+22.5%	\$138	+17.6%
	Orlando, FL	71.9%	+1.3%	\$184	+1.1%	\$132	+2.4%
	Palm Beach , FL	64.3%	+5.7%	\$200	+10.3%	\$129	+16.6%
	Sarasota, FL	66.0%	+0.8%	\$191	+5.9%	\$126	+6.7%
Upper Florida Keys	78.9%	+6.4%	\$310	+4.3%	\$244	+11.0%	
Aug	Daytona Beach, FL	52.5%	-0.5%	\$133	-5.1%	\$70	-5.5%
	Florida Keys	65.1%	-1.8%	\$246	-1.1%	\$160	-2.9%
	Fort Lauderdale, FL	63.8%	-2.4%	\$130	-3.8%	\$83	-6.2%
	Fort Myers, FL	49.4%	-0.6%	\$129	-2.8%	\$64	-3.4%
	Jacksonville, FL	61.1%	+0.1%	\$126	-1.3%	\$77	-1.2%
	Key Largo, FL+	59.9%	-8.0%	\$228	-4.8%	\$137	-12.4%
	Key West, FL	67.1%	-1.6%	\$239	-1.5%	\$160	-3.1%
	Miami, FL	63.6%	-7.6%	\$163	-0.3%	\$103	-7.9%
	Orlando, FL	60.3%	-5.6%	\$163	-1.6%	\$98	-7.0%
	Palm Beach , FL	61.4%	+2.0%	\$182	+3.1%	\$112	+5.2%
	Sarasota, FL	56.0%	-7.0%	\$167	+3.5%	\$94	-3.8%
Upper Florida Keys	63.1%	-1.9%	\$254	-0.8%	\$160	-2.6%	

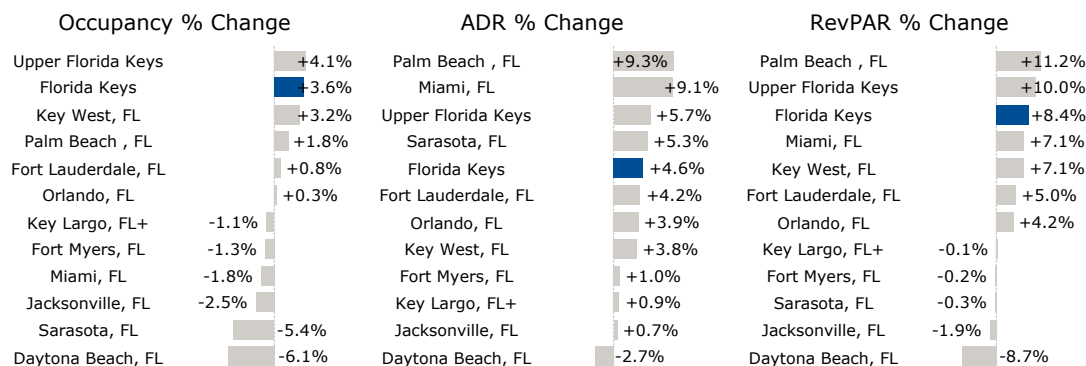
Source: STR

Fiscal Year-to-Date Performance

Performance by Market



% Change vs. Previous Year



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Preliminary September 2026 Hotel Performance

Florida Keys

Occupancy
55.9%
+12.1%

ADR
\$229
+5.7%

RevPAR
\$128
+18.5%

Hotel Performance by Market

	Occupancy		ADR		RevPAR	
Florida Keys	55.9%	+12.1%	\$229	+5.7%	\$128	+18.5%
Daytona Beach, FL	44.8%	+6.7%	\$116	+2.9%	\$52	+9.8%
Florida Central North	53.0%	+3.5%	\$123	+5.3%	\$66	+7.6%
Florida Central South	50.5%	-5.4%	\$120	+2.0%	\$61	-3.4%
Florida Panhandle	61.8%	+6.0%	\$150	+4.1%	\$93	+10.3%
Fort Myers, FL	45.7%	-3.5%	\$121	+2.4%	\$55	-1.5%
Jacksonville, FL	59.3%	+0.0%	\$130	+2.3%	\$77	+2.5%
Key West	59.5%	+11.0%	\$228	+3.4%	\$136	+14.7%
Key West, FL	59.5%	+11.0%	\$228	+3.4%	\$136	+14.7%
Melbourne, FL	61.7%	+12.1%	\$127	+4.9%	\$79	+17.6%
Miami, FL	64.0%	+6.9%	\$165	+9.5%	\$106	+17.3%
Monroe Cty Ex Key West+	51.7%	+12.3%	\$220	+8.4%	\$114	+21.9%
Orlando, FL	64.0%	+6.9%	\$182	+4.1%	\$117	+11.2%
Palm Beach , FL	58.2%	-0.5%	\$180	+2.7%	\$105	+2.2%
Sarasota, FL	52.0%	-2.7%	\$151	+0.5%	\$79	-2.3%

Note: Includes daily data through 9/26/2026
Source: STR

Preliminary September 2026 by Day-of-Week

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Florida Keys	50.1%	+15.1%	\$214	+7.4%	\$108	+23.9%
Daytona Beach, FL	38.9%	+5.5%	\$108	+2.1%	\$42	+7.6%
Florida Central North	49.2%	+2.6%	\$98	-1.7%	\$48	+0.9%
Florida Central South	48.4%	-5.4%	\$116	+3.1%	\$56	-2.4%
Florida Panhandle	58.3%	+8.0%	\$137	+7.5%	\$80	+16.0%
Fort Myers, FL	43.4%	-3.2%	\$116	+3.5%	\$50	-0.1%
Jacksonville, FL	56.7%	-0.4%	\$125	+2.9%	\$71	+2.6%
Key West, FL	54.2%	+13.5%	\$212	+3.4%	\$115	+17.3%
Melbourne, FL	56.7%	+7.6%	\$119	+0.4%	\$67	+8.0%
Miami, FL	60.2%	+7.8%	\$156	+9.7%	\$94	+18.4%
Orlando, FL	60.6%	+6.7%	\$183	+3.1%	\$111	+9.8%
Palm Beach , FL	56.4%	-0.2%	\$174	+4.0%	\$98	+3.7%
Sarasota, FL	49.2%	-1.6%	\$147	+4.0%	\$72	+2.4%

Week
Days

Week
Ends

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Florida Keys	70.2%	+7.0%	\$254	+4.0%	\$179	+11.3%
Daytona Beach, FL	59.5%	+8.6%	\$130	+3.6%	\$77	+12.8%
Florida Central North	62.3%	+5.4%	\$167	+14.6%	\$111	+16.0%
Florida Central South	56.0%	-5.4%	\$128	-0.1%	\$72	-5.5%
Florida Panhandle	70.4%	+2.0%	\$176	+0.0%	\$126	+2.2%
Fort Myers, FL	51.6%	-3.9%	\$133	+0.8%	\$69	-3.9%
Jacksonville, FL	65.6%	+0.8%	\$141	+1.3%	\$92	+2.2%
Key West, FL	72.8%	+6.6%	\$258	+4.1%	\$188	+10.9%
Melbourne, FL	74.1%	+21.9%	\$144	+12.3%	\$106	+36.8%
Miami, FL	73.4%	+5.1%	\$185	+9.1%	\$137	+15.3%
Orlando, FL	72.6%	+7.3%	\$180	+6.5%	\$131	+14.3%
Palm Beach , FL	62.9%	-1.0%	\$195	+0.3%	\$123	-0.5%
Sarasota, FL	59.2%	-5.1%	\$158	-5.4%	\$94	-10.2%

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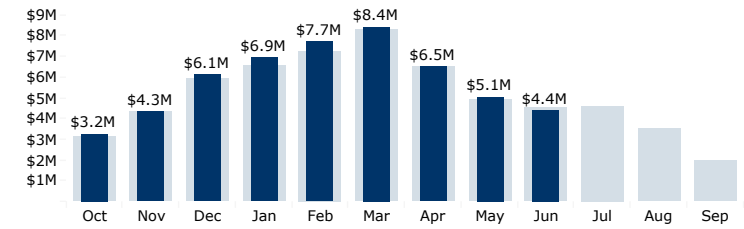
The Florida Keys & Key West Hotel Occ Tax Collections



Hotel Occ Tax Tax Collections by Month

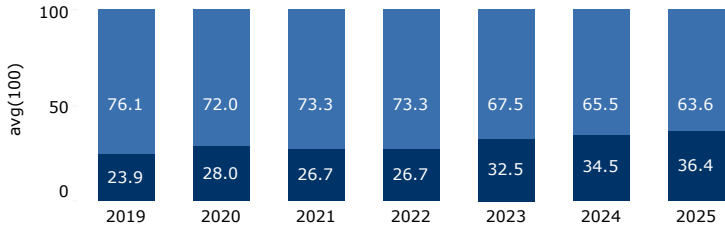
Fiscal Year 2026 | Location: All

■ Current YTD ■ STLY YTD



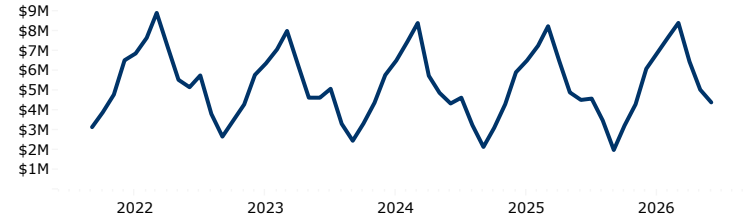
Bed Tax Contribution

Fiscal Year | ■ Non - STR ■ STR



Hotel Occ Tax Tax Collections

Long Term Trend | Location: All



Source: The Florida Keys & Key West

Oct 2025 - Jun 2026 Collections

\$52.7M

+2.5% 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	\$1.8M				\$25.1M
District II	\$256.4K	\$364.7K	\$525.2K	\$692.8K	\$676.0K	\$692.3K	\$506.1K	\$421.7K	\$358.3K				\$4.5M
District III	\$409.3K	\$600.3K	\$1.1M	\$1.2M	\$1.4M	\$1.6M	\$1.1M	\$827.0K	\$950.9K				\$9.2M
District IV	\$315.9K	\$430.1K	\$653.4K	\$679.1K	\$820.9K	\$980.1K	\$780.0K	\$612.2K	\$573.1K				\$5.8M
District V	\$470.4K	\$622.2K	\$917.3K	\$980.8K	\$1.2M	\$1.4M	\$1.0M	\$810.9K	\$722.3K				\$8.1M
Total	\$3.2M	\$4.3M	\$6.1M	\$6.9M	\$7.7M	\$8.4M	\$6.5M	\$5.1M	\$4.4M				\$52.7M

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%	+4.1%	-0.3%				+2.3%
District II	+14.9%	+12.3%	-1.7%	+9.5%	+6.0%	+0.2%	-9.3%	+2.9%	-6.5%				+2.3%
District III	+1.8%	-3.2%	+3.0%	+7.8%	+8.0%	-1.7%	+0.8%	-4.5%	-3.5%				+1.3%
District IV	+19.1%	+10.4%	+6.5%	+15.7%	+11.0%	+5.9%	+5.9%	+12.3%	+1.1%				+8.9%
District V	+0.6%	-5.0%	+5.0%	+2.0%	-0.7%	+3.9%	-1.3%	+0.6%	-8.4%				+0.0%
Total	+3.7%	-0.2%	+3.0%	+5.9%	+6.2%	+2.1%	-0.7%	+2.8%	-2.7%				+2.5%

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Airport TSA Checkpoint Volume & Visitor Origins

EYW - Key West International



Monthly TSA Checkpoint Volume

August 2026 Volume

60.3K

+3.3% YOY

Year-to-Date TSA Checkpoint Volume & Visitor Origins

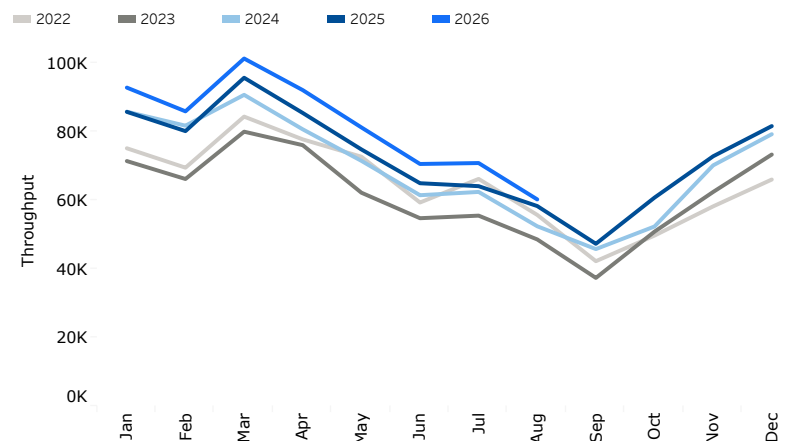
Oct 2025 - Aug 2026 Volume

870.4K

+7.2% YOY

TSA Checkpoint Volume by Month

Last Five Calendar Years

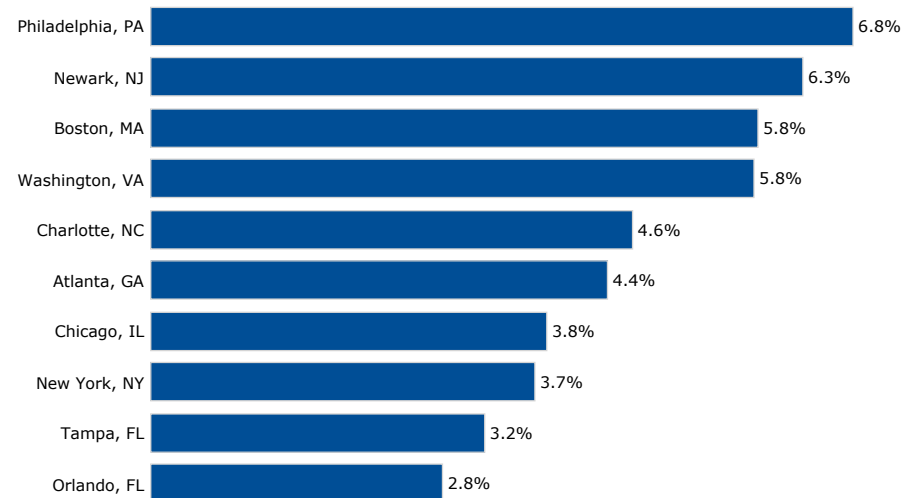


Source: Transportation Security Administration

Source: Transportation Security Administration

Top Origin Markets - Air

Oct 2025 - Aug 2026 Visitor Arrivals



Source: OAG



Website Performance Summary

August 2026 | Properties: 321274354



Users
530.0K
+9.8% YOY



Sessions
569.4K
+6.2% YOY



Engaged Sessions
309.3K
+4.6% YOY



Engagement Rate
54.3%
-0.86% pt YOY



Page Views
827.8K
-9.1% YOY



Pages Per Session
1.45 pages
-0.24 pages YOY

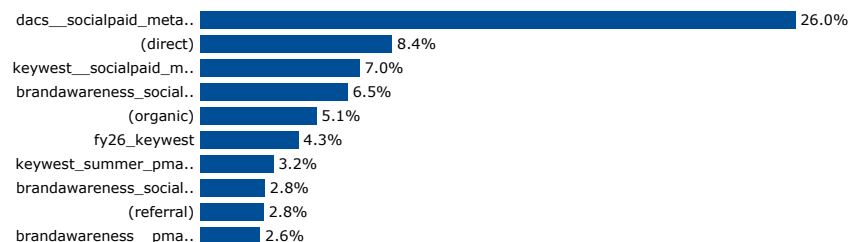


Avg. Session Duration
00:08:46
-200 sec YOY

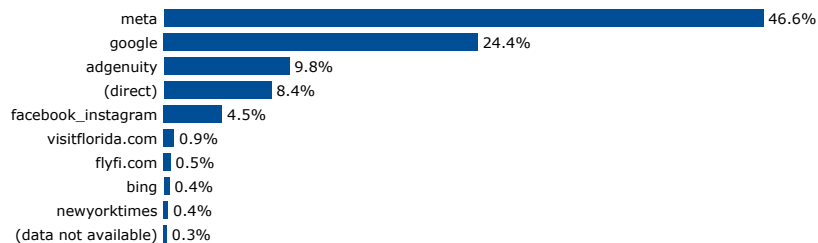


Bounce Rate
45.7%
+0.86% pt YOY

Campaigns

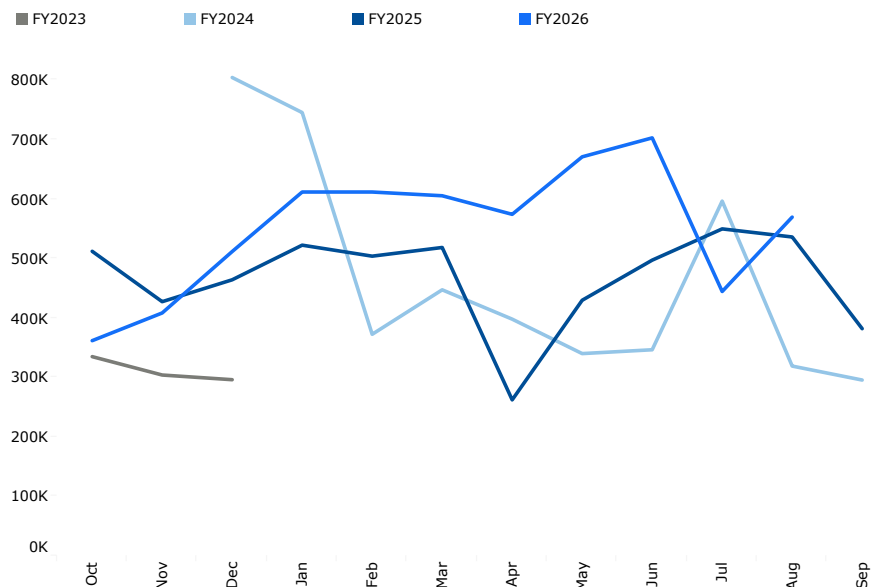


Sources



Sessions Analysis

Monthly Trend



Source: Google Analytics

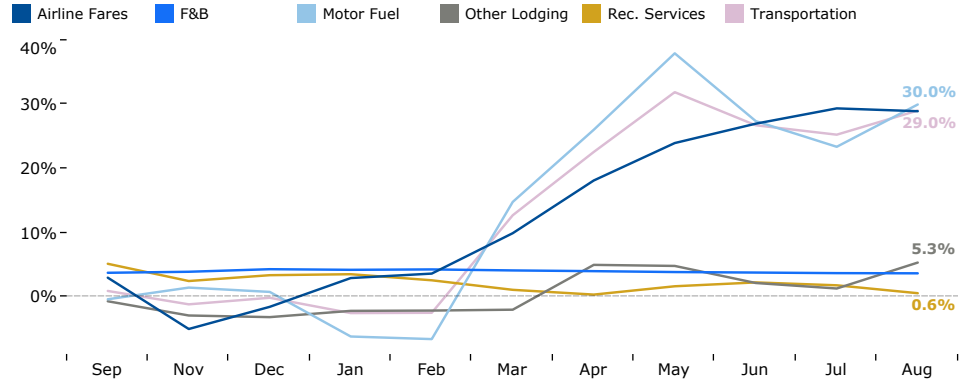
Note: Due to Google's practice of exporting sampled data to protect user identities, figures may not precisely match data viewed in the Google Analytics platform.

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National Travel Trends

Travel Price Index

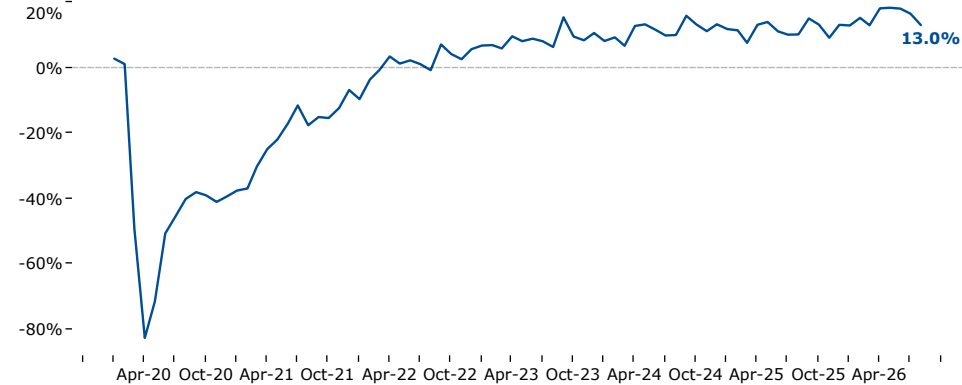
% Change Relative to Same Month in Previous Year | Last 12 Months



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

Travel Spending (% change vs 2019)

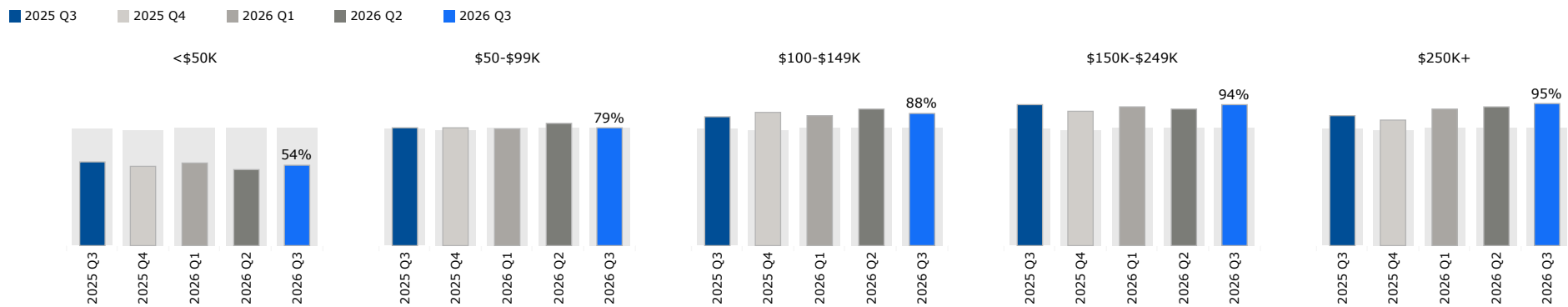
% Change vs. 2019 | U.S. total



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

Planning Leisure Travel Within the Next 12 Months

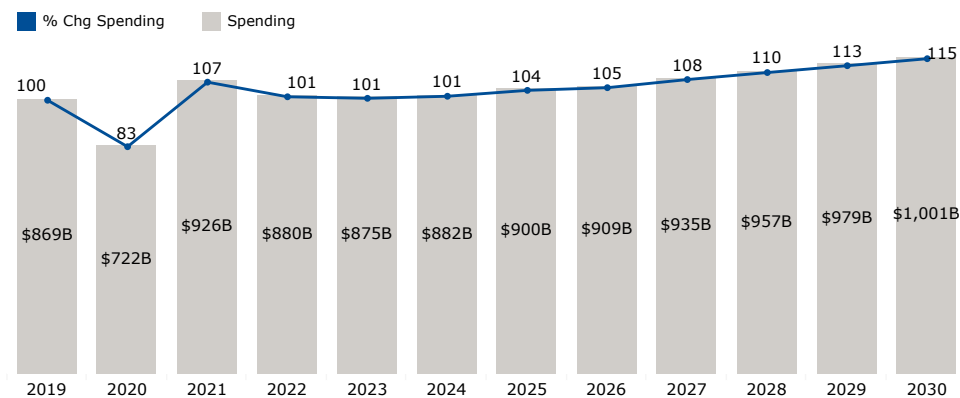
% of American Consumers Planning Travel by Household Income (Calendar Year)



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

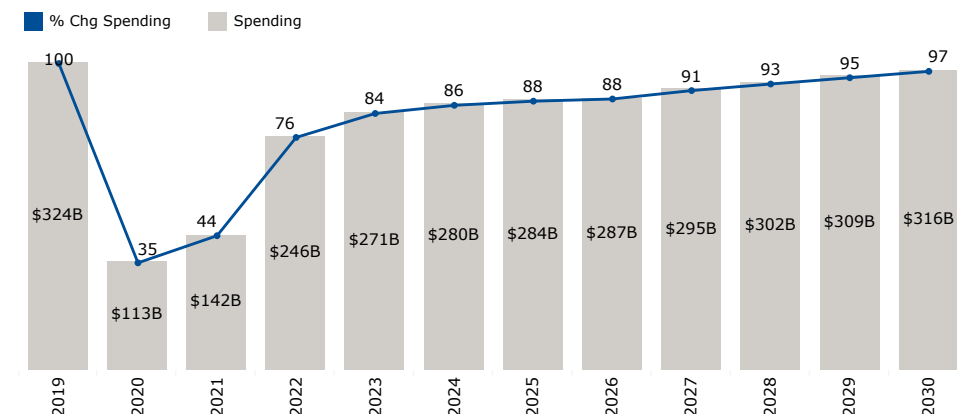
Real Domestic Leisure Travel Spending

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



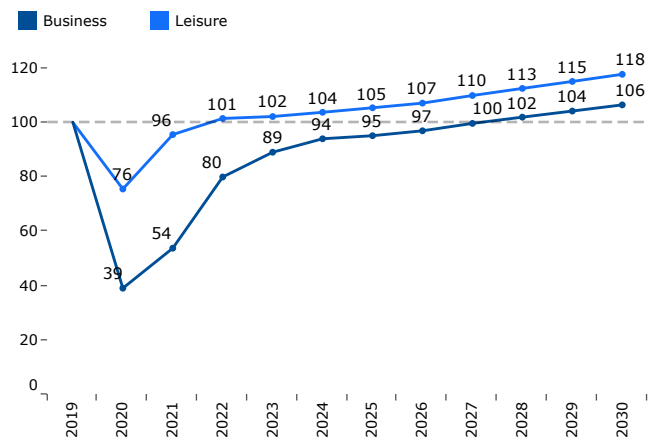
Real Domestic Business Travel Spending

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



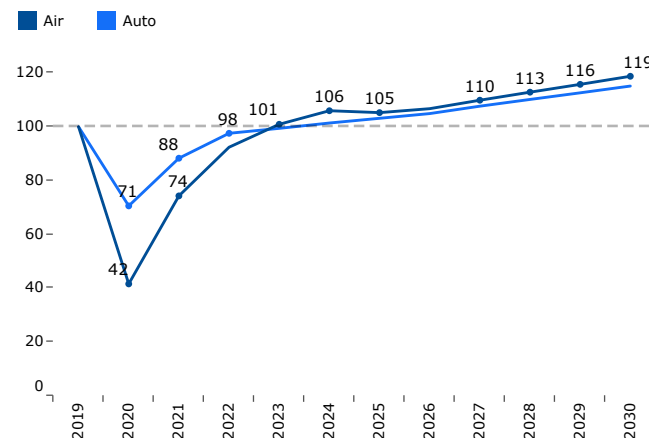
Leisure vs. Business Travel Volume

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)

