WEEKLY PERFORMANCE SNAPSHOT

October 19, 2026

The Florida Keys & Key West
MONROE COUNTY TDC

THE BOTTOM LINE

For October 4–10, Florida Keys hotel RevPAR was up 9.1% to $173.09, led by a 7.6% occupancy gain, with Key West up 3.3%. Vacation rental revenue on the books for October through December is up 7.6% to $16.3M.

OCT 4–10 REVPAR · FLORIDA KEYS
$173.09
▲9.1% vs LY
ADR $265.38 · Occ 65.2%

OCT 4–10 REVPAR · KEY WEST
$186.40
▲3.3% vs LY
ADR $263.96 · Occ 70.6%

VACATION RENTAL REVENUE
$16.3M
▲7.6% vs LY
Oct–Dec on the books

HOTEL PERFORMANCE

Source: STR/CoStar · weekly, Oct 4–10

- **Florida Keys RevPAR up 9.1%.** Occupancy was 65.2% (+7.6%) and ADR was $265.38 (+1.4%).
- **Key West RevPAR up 3.3%.** Occupancy was 70.6% (+4.7%). ADR was down 1.3% to $263.96.
- **Calendar YTD remains ahead.** Florida Keys RevPAR is $283.74 (+11.4%) on ADR of $369.96 (+6.2%). Key West RevPAR is $299.76 (+9.9%).

FORWARD OUTLOOK

Source: TravelClick D360 · as of 10/11

OCT	NOV	DEC
+10.1%	+22.6%	+13.4%
RevPAR	RevPAR	RevPAR

- **All three months ahead of LY.** Occupancy is up 6.4% to 13.3% and ADR is up 3.7% to 9.3%.
- **November shows the largest gain.** Occupancy is up 13.3% and ADR is up 9.3%.

VACATION RENTAL PACING

Source: Key Data · as of 10/18 vs same point LY

OCT	NOV	DEC
+9.8%	+4.7%	+8.8%
$4.1M	$5.5M	$6.7M

- **$16.3M on the books** for October through December, up $1.2M (+7.6%) over same point LY.
- **November is the smallest gain,** up 4.7%, while hotel RevPAR for November is up 22.6% in D360.

MARKET CONTEXT

Source: Future Partners, State of the American Traveler · fielded Sept 15–22

57.3%
took an overnight leisure trip in the past month, up from 49.6% a year ago

48.5%
expect a recession within 6 months, up from 46.6% in August

32.7%
say gas prices held back travel, about double a year ago

31.6%
of non-family holiday travelers have not picked a destination; beaches top the list

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

PREPARED BY THE MONROE COUNTY TDC