WEEKLY PERFORMANCE SNAPSHOT

November 9, 2026

The Florida Keys & Key West
MONROE COUNTY TDC

THE BOTTOM LINE

For October 25-31, Florida Keys RevPAR rose 13.4% and Key West rose 8.8%, with occupancy accounting for most of the gain. Vacation rental revenue on the books for November through January is up 7.2%.

OCT 25-31 REVPAR · FLORIDA KEYS
$165.37
▲13.4% vs LY
ADR $260.28 · Occ 63.5%

OCT 25-31 REVPAR · KEY WEST
$184.89
▲8.8% vs LY
ADR $262.85 · Occ 70.3%

VACATION RENTAL REVENUE
$20.8M
▲7.2% vs LY
Nov-Jan on the books

HOTEL PERFORMANCE

Source: STR/CoStar · weekly, October 25-31

- **Occupancy accounted for most of the gain.** Florida Keys occupancy rose 11.8% to 63.5%. ADR rose 1.4% to $260.28.
- **Key West ADR was flat.** ADR was $262.85 (-0.3%). Occupancy rose 9.0% to 70.3%.
- **Year to date,** Florida Keys RevPAR is $278.08 (+11.3%) and Key West RevPAR is $295.74 (+10.0%).

FORWARD OUTLOOK

Source: TravelClick D360 · as of November 1, 2026

NOV	DEC	JAN
+17.7%	+13.0%	+6.0%
RevPAR	RevPAR	RevPAR

- **November and December lead.** November gains are split between occupancy (+8.0%) and ADR (+9.7%).
- **January growth is smaller.** Occupancy is up 3.5% and ADR is up 2.5%.

VACATION RENTAL PACING

Source: Key Data · as of 11/6 vs same point LY

NOV	DEC	JAN
+3.5%	+8.3%	+9.2%
$5.9M	$7.4M	$7.5M

- **$20.8M on the books** for November through January, up $1.4M (+7.2%) over same point LY.
- **Growth increases further out,** from +3.5% in November to +9.2% in January.

HOLIDAY TRAVEL SENTIMENT

Source: Longwoods ATS Wave 112 · fielded Oct 6-9

31%
plan to travel less this holiday season, up 8.3 pts from Oct 2025

35%
plan to spend less on holiday travel, up 10.9 pts from Oct 2025

35%
say gas prices will greatly impact travel plans, up 9.6 pts from Sep

53%
plan holiday travel by car; plane travel down 5.6 pts from Oct 2025

Sources: STR/CoStar, TravelClick D360, Key Data, Longwoods International ATS Wave 112

PREPARED BY THE MONROE COUNTY TDC