WEEKLY PERFORMANCE SNAPSHOT

November 16, 2026

The Florida Keys & Key West
MONROE COUNTY TDC

THE BOTTOM LINE

For the week of November 1–7, Florida Keys RevPAR rose 14.5% and Key West RevPAR rose 11.4%, led by ADR in both. Vacation Rental Revenue on the books for November through January is up 5.1%.

NOV 1–7 REVPAR · FLORIDA KEYS
$304.22
▲14.5% vs LY
ADR $401.54 · Occ 75.8%

NOV 1–7 REVPAR · KEY WEST
$358.72
▲11.4% vs LY
ADR $440.66 · Occ 81.4%

VACATION RENTAL REVENUE
$21.3M
▲5.1% vs LY
Nov–Jan on the books

HOTEL PERFORMANCE

Source: STR/CoStar · weekly, November 1–7

- **Florida Keys ADR up 10.4%** to $401.54. Occupancy was 75.8%, up 3.7%.
- **Key West ADR up 6.9%** to $440.66. Occupancy was 81.4%, up 4.2%.
- **Ahead of year-to-date pace.** Calendar YTD RevPAR is $278.63 (+11.7%) for the Florida Keys and $297.11 (+10.4%) for Key West.

FORWARD OUTLOOK

Source: TravelClick D360 · as of November 8, 2026

NOV	DEC	JAN
+19.0%	+14.3%	+8.0%
RevPAR	RevPAR	RevPAR

- **November and December up double digits.** Occupancy up 8.3% and 5.8%, ADR up 9.9% and 8.0%.
- **January is occupancy led.** Occupancy is up 5.4% with ADR up 2.5%.

RevPAR derived from D360 occupancy and ADR: (1 + Occ %) × (1 + ADR %) − 1

VACATION RENTAL PACING

Source: Key Data · as of 11/15/26 vs same point LY

NOV	DEC	JAN
+3.4%	+6.1%	+5.5%
$6.0M	$7.6M	$7.7M

- **$21.3M on the books** for November through January, up $1.0M (+5.1%) over same point LY.
- **December and January pace ahead of November,** which is up 3.4%.

TRAVELER SENTIMENT

Source: Future Partners · American Traveler, Oct 15–28 survey

51.2%
have trips planned for a holiday

32.8%
have a December leisure trip planned (26.1% November)

27.3%
have a Thanksgiving trip planned

32.6%
say now is a good time to spend on travel (37.7% in June)

CONSUMER SPENDING SIGNALS

Source: Bank of America Institute · Consumer Morsel, November 9, 2026

What it is. Bank of America tracks its customers' card spending to see whether people are shopping at higher-priced or lower-priced places.

Why it matters. Americans are shifting to cheaper options, mostly in clothing and dining. Travel is the exception. People who are traveling are not trading down. BofA's read is that budget households are skipping trips.

Most since 2021
Americans shifting to cheaper stores and restaurants

Travel
is the exception, with spending shifting to pricier options

Sources: STR/CoStar, TravelClick D360, Key Data, Future Partners, Bank of America Institute

PREPARED BY THE MONROE COUNTY TDC