Background & Methodology

Study Overview

The analysis of Key West International Airport (EYW) visitors to Key West and the Florida Keys was commissioned by the Monroe County Tourism Development Council (TDC). The research was conducted by Rockport Analytics, an independent market research & consulting company with offices in Annapolis, MD and West Chester, PA. The objective of the study was to better understand visitation to the Keys through the EYW airport. Specific measurement and analysis included:

- Determining the origin markets of visitors travelling through EYW and comparing how the origin markets for these visitors differ from those traveling by other transportation means.
- Estimating the share of all EYW visitors traveling to each island district after their arrival at the airport
- Gaining a better understanding of lodging preferences of EYW visitors and how they differ from those traveling to the Keys via means other than flying into or out of EYW.
- Estimating visitor expenditures by EYW visitors to the Florida Keys and comparing those to the expenditures of “non-airport visitors”
- Assessing the how road infrastructure in the Keys is impacted by “airport visitors” vs. “non-airport visitors”

Methodology

The study was conducted using 2018 geo-location data from UberMedia which captures and tracks the movement of a large and representative sample of visitors’ GPS-enabled devices. The analysis included geofencing both the airport as well as each individual lodging property in the Keys. Each lodging property was classified as a hotel, motel, dwelling, BNB or condo/apartment (full definitions on page 24). These airport and lodging datasets were merged to an accompanying geo-location dataset of all visitors to the Keys in 2018. This database included the island district(s) visited by each visitor as well as the origin location of visitors. Combining these datasets provides the basis for our analysis of differences between “airport” and “non-airport” visitors in terms of regions visited, the timing of their visits and their lodging preferences. “Airport” visitors in this study includes anyone who arrives or departs from Key West International Airport (EYW) while anyone who does not arrive or depart from EYW is classified as a “non-airport” visitor, whether or not they may have traveled through another airport (e.g., Miami International Airport) to reach the Keys.

By overlaying the data from our 2018 visitor study along with data collected by the Monroe TDC and JDO Insights, we could also estimate differences in visitor trip spending between airport and non-airport visitors. Additional analysis and context for this study came from secondary research and synthesis of other data sources including: data from the Bureau of Transportation Statistics, the 2019 US 1 Arterial Time Delay Study commissioned by the Florida Department of Transportation and Monroe County and a 2016 study of Key West visitor transportation choices from researchers at the University of South Florida.
Key West international airport has seen steady increases in visitor arrivals since 2015 reaching a peak of 482,930 in 2019. Arrivals jumped significantly in both 2018 and 2019, growing at double-digit rates each year.

Of the top ten EYW origin markets in 2018, eight were in the South Atlantic census division. Roughly 35% of passengers arrived from Atlanta and nearly another 38% arrived from other markets in Florida.

In 2018, nearly 93% of passengers flew in three major carriers, Republic Airlines, Delta and Silver. Silver exclusively serves cities in Florida.

In 2019, flights to the following cities were added or expanded: Philadelphia, Chicago, Dallas, NY (LaGuardia) and Newark. Service to Dallas, Newark and Chicago began or expanded in 2018.

EYW served fifteen domestic destinations at the start of 2020 before the Florida Keys was closed to visitors in March because of the COVID-19 pandemic. In 2021, Allegiant Airlines is planning on launching service to EYW from Nashville, Orlando (Sanford), Pittsburgh and Cincinnati/Kentucky. Jet Blue will be launching seasonal service from Boston and New York (Kennedy). United is also adding service from Houston and Washington Dulles in 2021. This will bring the total number of domestic destinations served by EYW to twenty one.
On Average, 23 Flights Arrived at EYW Each Day From 11 Destinations in 2018

Non-stop Service Airlines and Airports 2018
- Delta: Atlanta (ATL)
- American: Miami (MIA), Dallas/Fort Worth (DFW), Charlotte (CLT), Washington DC (DCA)
- United: Chicago (ORD), Newark (EWR)
- Silver Airways: Ft. Lauderdale (FLL), Fort Myers (RSW), Tampa (TPA), Orlando (MCO)

New non-stop routes added in 2019/2020
- Delta: New York LaGuardia (LGA)
- American: Philadelphia (PHL), Chicago (ORD), LaGuardia (LGA), Boston (BOS)

Major Carriers 2018

<table>
<thead>
<tr>
<th>Major Carriers 2018</th>
<th>Total Passengers*</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Republic Airlines (American Eagle, Delta Connection, and United Express)</td>
<td>367</td>
<td>43.2%</td>
</tr>
<tr>
<td>Delta</td>
<td>248</td>
<td>29.2%</td>
</tr>
<tr>
<td>Silver Airways</td>
<td>171</td>
<td>20.2%</td>
</tr>
<tr>
<td>ExpressJet (United Express)</td>
<td>53</td>
<td>6.3%</td>
</tr>
<tr>
<td>Endeavor (Delta Connection)</td>
<td>7</td>
<td>0.8%</td>
</tr>
<tr>
<td>Other</td>
<td>3</td>
<td>0.3%</td>
</tr>
</tbody>
</table>

*Includes both arrivals and departures
Source: Bureau of Transportation Statistics. T-100 Domestic Market US Carriers

Key West Airport Flights per Month 2010-2019

Source: Bureau of Transportation Statistics. T-100

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Overview of EYW Airfares

- In 2018, the average airfare to EYW was the third most expensive among all commercial airports in Florida. Average EYW airfares were 35% higher than those to FLL and 76% higher than those to MIA.

- Over the last ten years, EYW fare increases have mostly kept pace with national airfares – declining in the period of 2010 through 2012 – before rising faster than average from 2013 through 2016 and then leveling off over the last few years. Since 2010, airfares to EYW have stayed above $350 reaching a peak of nearly $500 in 2015. The slight declines in average airfares from 2016 to 2019 coincide with an increase in service from airports in the Mid-Atlantic and Midwest regions.

- With the announcement of new routes from low cost carriers Allegiant and Jet Blue we expect average airfares to the Florida Keys are likely to fall in 2021 and 2022 even as passenger volumes rise.

Source: Bureau of Transportation Statistics, Airline Origin & Destination Survey (10% Sample), Fares exclude baggage fees or other fees paid at the airport or onboard the aircraft.
Quality public infrastructure is central to a viable travel and tourism industry. Transportation infrastructure including roads, bridges and airports allows access to the Florida Keys and ensures that visitors get to their desired travel destinations both safely and efficiently. Numerous studies\(^1\) have shown that quality infrastructure can also enhance travelers’ overall experience and satisfaction when traveling to a destination\(^1\). Investments in infrastructure also improve the quality of life for residents by allowing fewer traffic delays and ease and enjoyment of daily commutes.

US 1 is the only vehicular access route to the Florida Keys for residents and visitors. In recent years increases in traffic volumes down the Route 1 corridor have resulted in travel delays during high volume periods. The Florida Department of Transportation and Monroe County conduct a study every two years to assess the traffic volume and flow conditions along US 1. Findings from the most recent study show:

- **Annual traffic volumes in Big Pine Key (Lower Keys), Marathon and Upper Matecumbe (Islamorada) grew between 2017 and 2019 and traffic in both Marathon and Islamorada have steadily increased since 2013.**
- **From 2017 to 2019, 15 of the 24 measured segments along US 1 witnessed decreases in median speeds and the median speed for US 1 declined from 46 mph to 44.6 mph. The worst declines in median speeds across the county were measured in Islamorada— from mile marker 73 through mile marker 91.5. The Plantation Key segment (mile marker 86 to 91.5) decreased by 5.2 mph in 2019.**
- **In both 2017 and 2019, out of the five delay sources\(^2\) measured in the study, congestion added the most additional minutes per trip, adding seven and five minutes respectively.**

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\(^2\) Delay sources include: congestion, traffic signals, accidents, construction, draw bridges; delay event is when a vehicle is only traveling between 5 and 15 miles per hour. Source: 2019 US 1 Arterial Time Delay Study. Prepared for Monroe County Planning Department, prepared by: AECOM.
Researchers from the University of South Florida studied vehicular congestion in Key West after a 2015 city-sponsored survey identified traffic as the third “biggest issue” for residents. In this 2016 study, researchers asked visitors about their transportation choices for arrival in Key West and their transportation choices while on the island. The study found that most visitors (66%) used automobiles to get to Key West. First time visitors were even more likely to arrive via rented vehicle while repeat visitors were more likely to arrive via a flight into EYW airport.

Survey results also showed that more than one third (31%) of visitors who drove their personal vehicle and 37% of those who rented a vehicle said EYW airport was an option they would consider using for their next trip.

This study also found that the location of a visitor’s lodging has an impact on their vehicular use during their stay in Key West. About 14% of visitors who stayed at properties in “Old Town” or “downtown” (along Duval Street) used a vehicle (personal or rental) as their primary form of transportation while those who stayed in other parts of town used a vehicle more than 40% of the time. Lastly, results from the survey showed that 67% of visitors who arrive via the airport did not use a vehicle during their visit.

Researchers suggest that developing marketing messages that make visitors aware that they seldom need a vehicle to get around while in Key West could convince them to consider traveling via EYW airport and thus help reduce the number of vehicles on US 1 and curtail congestion throughout Key West.

Changes in Mode of Arrival to Key West by Number of Visits

<table>
<thead>
<tr>
<th></th>
<th>First Time Visitor</th>
<th>Second Time Visitor</th>
<th>Visited 3-5 Times</th>
<th>Visited 5+ Times</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Vehicle</td>
<td>26%</td>
<td>31%</td>
<td>36%</td>
<td>40%</td>
</tr>
<tr>
<td>Rental Vehicle</td>
<td>20%</td>
<td>17%</td>
<td>14%</td>
<td>34%</td>
</tr>
<tr>
<td>Airport</td>
<td>6%</td>
<td>4%</td>
<td>4%</td>
<td>11%</td>
</tr>
<tr>
<td>Ferry</td>
<td>11%</td>
<td>11%</td>
<td>10%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Most Common Modes of Transportation

Visitor Volumes, EYW Arrivals and Vehicular Traffic Have All Increased in Recent Years

- Total visitor volume to the Florida Keys grew in 2015 and 2016 before falling slightly in 2017 when the region was impacted by Hurricane Irma. Despite the significant impact the hurricane had on visitor activity in the first half of 2018, visitor volume still managed to grow 1.5%, year-over-year.

- Passenger arrivals to EYW airport have risen since 2016 and in the span of two years (2017-2019) arrivals grew by nearly 29%. The growth in arrivals in 2018 and 2019 coincides with the introduction of new routes and the expansion of service to existing routes.

- According to the 2019 Arterial Travel Time Study, average annual daily traffic volume along US 1 has also increased since 2011, declining only twice in the last eight years. Traffic spiked by nearly 15% between 2013 and 2015 and it declined slightly between 2015 and 2017, again impacted by Hurricane Irma. Vehicular volume rose by almost 11% between 2017 and 2019, a period when tourism to the Keys was able to get back on track.

- It is critical that policymakers focus on diverting resources to the infrastructure projects that will improve transportation while continuing to generate revenue and economic impact for the region. In 2018, Tourism in the Keys generated $1.8 billion in value added to the Monroe County economy and supported 26,500 Monroe County jobs – representing 54% of Monroe County private sector GDP and 44% Monroe County employment.

**Total Visitor Volume to the Florida Keys 2014-2018**

- 2014: 4.89
- 2015: 5.04 (+3.2%)
- 2016: 5.07 (+0.4%)
- 2017: 5.05 (-0.3%)
- 2018: 5.13 (+3.6%)


- % Change EYW Arrivals
  - 2011: 48%
  - 2013: 36%
  - 2015: 28.7%
  - 2017: 10.5%

- % Change Vehicular Volume
  - 2011: 8.4%
  - 2013: 15.4%
  - 2015: 14.9%
  - 2017: 8.3%
  - 2019: 10.5%

Sources: Rockport Analytics, Uber Media, DK Shifflet

Sources: 2019 US 1 Arterial Time Delay Study. Prepared for Monroe County Planning Department, prepared by: AECOM and Bureau of Transportation Statistics. T-100

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The seasonality of Keys visitation looks similar between both airport visitors and non-airport visitors (as highlighted in the chart at top left) with January through July being the busiest months for visiting the region. There are, however, some slight differences in the seasonal trends between the groups:

- Airport visitors are more likely to travel in the winter and early spring months – a popular period for air travel to the warm and sunny Florida Keys from the colder northern latitudes.
- The summer months are more likely to be busier times for visitors not flying the EYW airport as many families and regional drive visitors make their way to the Keys.

EYW visitors are significantly more likely to travel to the Lower Keys with over a quarter of EYW visitors making their way to the Lower Keys.

Non-airport visitors who travel to the Florida Keys are, not surprisingly, more likely to visit Key Largo and Islamorada than those flying into EYW. Interestingly they are also significantly more likely to visit Marathon than visitors flying into EYW.

More than half (55%) of visitors who do not fly through EYW end up visiting Key West. While more analysis would need to be done to assess the full economic impact of incentivizing these Key West visitors to fly directly to Key West, this could potentially improve their ease of travel and help reduce the traffic volume on US 1.
Visitors to the Florida Keys and Primary Location of Lodging

Dwellings make up more than half of all the lodging properties (52%) in Key Largo.

Key Largo and Marathon both have 21% of all the motels in the Florida Keys and 11% of all the hotels.

Islamorada has the largest share of Motels in the Florida Keys (28%).

Dwellings make close to two thirds of all the lodging properties (63%) in Islamorada.

Marathon has the second largest number of total properties, second only to Key West.

About 36% of the properties in Key West are Apartments & Condos.

Key West has the second largest share of Motels in the Florida Keys (26%).

Nearly 8 in 10 of all the properties in the Lower Keys are Dwellings.

The Lower Keys have the smallest share of Motels (4%) and Apartments & Condos (4%) in the Florida Keys.
Visitors who fly through EYW airport spend an average of $99.45 per day, this is about $30.51 (44%) more than visitors who arrive using other forms of transportation. Visitors who travel through EYW airport have a length of stay of 5.3 nights in the Florida Keys compared to non-airport travelers with a length of stay of 4.3 nights.

Keys visitors arriving through the airport allocate more of their daily spending towards lodging, shopping and entertainment and recreation than those not arriving through the airport. More of the daily spending budget among non-airport visitors is allocated towards food & beverage. The share of daily transportation budgets between the two visitor segments are similar (7%) but the amount of spending is higher among airport visitors- around $7/day vs less than $5/day for non-airport visitors.

From a tourism development standpoint, EYW airport visitors are attractive because they are spending more per day in the Keys and also placing less demand on the road and bridge infrastructure of the region.

Source: D.K.Shifflet, Uber Media, NTTO, STR, Monroe County TDC, JDO Insights, Inc, AirDNA, VisaVue, Rockport Analytics
2018 Visitors to the Florida Keys That Traveled Through Key West International Airport

Index of Origin States with High Proportion of Keys Visitors Traveling Through EYW (100 = Average)

<table>
<thead>
<tr>
<th>State of Origin</th>
<th>Index Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Washington, DC</td>
<td>251</td>
</tr>
<tr>
<td>Mississippi</td>
<td>207</td>
</tr>
<tr>
<td>North Carolina</td>
<td>183</td>
</tr>
<tr>
<td>Iowa</td>
<td>182</td>
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<tr>
<td>Arkansas</td>
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<td>Louisiana</td>
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<td>Nebraska</td>
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<td>Georgia</td>
<td>171</td>
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<tr>
<td>Virginia</td>
<td>170</td>
</tr>
<tr>
<td>Oklahoma</td>
<td>168</td>
</tr>
</tbody>
</table>

Source: UberMedia, Rockport Analytics
## Comparing Origin Markets of Key West Visitors

<table>
<thead>
<tr>
<th>Metro Area of Origin of Non-Airport Visitors Who Stay in Key West</th>
<th>Share of Visitation</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York, NY</td>
<td>6.1%</td>
</tr>
<tr>
<td>Tampa-St. Petersburg (Sarasota), FL</td>
<td>5.9%</td>
</tr>
<tr>
<td>Washington, DC (Hagerstown, MD)</td>
<td>4.4%</td>
</tr>
<tr>
<td>Miami-Fort Lauderdale, FL</td>
<td>4.1%</td>
</tr>
<tr>
<td>Philadelphia, PA</td>
<td>3.8%</td>
</tr>
<tr>
<td>Orlando-Daytona Beach-Melbourne, FL</td>
<td>3.6%</td>
</tr>
<tr>
<td>Atlanta, GA</td>
<td>3.5%</td>
</tr>
<tr>
<td>Chicago, IL</td>
<td>2.8%</td>
</tr>
<tr>
<td>Boston, MA (Manchester, NH)</td>
<td>2.6%</td>
</tr>
<tr>
<td>West Palm Beach-Ft Pierce, FL</td>
<td>2.0%</td>
</tr>
<tr>
<td>Ft. Myers-Naples, FL</td>
<td>1.9%</td>
</tr>
<tr>
<td>Raleigh-Durham (Fayetteville), NC</td>
<td>1.9%</td>
</tr>
<tr>
<td>Charlotte, NC</td>
<td>1.7%</td>
</tr>
<tr>
<td>Detroit, MI</td>
<td>1.7%</td>
</tr>
<tr>
<td>Baltimore, MD</td>
<td>1.7%</td>
</tr>
<tr>
<td>Jacksonville, FL</td>
<td>1.6%</td>
</tr>
<tr>
<td>Dallas-Ft. Worth, TX</td>
<td>1.5%</td>
</tr>
<tr>
<td>Houston, TX*</td>
<td>1.5%</td>
</tr>
<tr>
<td>Cleveland-Akron (Canton), OH</td>
<td>1.4%</td>
</tr>
<tr>
<td>Norfolk-Portsmouth-Newport News, VA</td>
<td>1.2%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Metro Area of Origin of EYW Airport Visitors Who Stay in Key West</th>
<th>Share of Visitation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Miami-Fort Lauderdale, FL</td>
<td>12.8%</td>
</tr>
<tr>
<td>Tampa-St. Petersburg (Sarasota), FL</td>
<td>8.0%</td>
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<tr>
<td>Orlando-Daytona Beach-Melbourne, FL</td>
<td>6.4%</td>
</tr>
<tr>
<td>West Palm Beach-Ft Pierce, FL</td>
<td>5.7%</td>
</tr>
<tr>
<td>New York, NY</td>
<td>5.2%</td>
</tr>
<tr>
<td>Ft. Myers-Naples, FL</td>
<td>4.6%</td>
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<tr>
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<td>Detroit, MI</td>
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</tr>
<tr>
<td>Houston, TX</td>
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<tr>
<td>Dallas-Ft. Worth, TX</td>
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</tr>
<tr>
<td>Baltimore, MD</td>
<td>1.2%</td>
</tr>
<tr>
<td>Minneapolis-St. Paul, MN</td>
<td>1.1%</td>
</tr>
<tr>
<td>Los Angeles, CA</td>
<td>1.1%</td>
</tr>
<tr>
<td>Cleveland-Akron (Canton), OH</td>
<td>1.0%</td>
</tr>
<tr>
<td>Raleigh-Durham (Fayetteville), NC</td>
<td>0.9%</td>
</tr>
</tbody>
</table>

Source: Rockport Analytics, Uber Media

- Direct Service to EYW
Two-Thirds of All Lodging Properties in the Florida Keys are in Marathon & Key West

- Visitors to the Florida Keys have a variety of accommodation choices available to them with 1,288 various types of lodging properties available throughout the Keys. About 66% of all available lodging properties are in Key West and Marathon. Key Largo and Islamorada combined have about a quarter (25.7%) of the properties with the remaining 8% located in the Lower Keys.

- About 57% of the available lodging properties in the Florida Keys are licensed as dwellings. Roughly 4 in 10 licensed dwellings are in Marathon. Apartments and condominiums make up about a quarter of the properties in the Keys and nearly half of these are in Key West. Key West has roughly nine out of ten BNBs and three quarters of all hotel properties in the Keys. Key Largo has most of the remaining hotel properties (11%). Islamorada has the largest share of motels in the Keys (28%) followed by Key West which has 26% of the available motel properties.

- While Hotels, Motels and BNBs combined make up only 17% of the properties in the Keys, many of these have a large number of rooms and can accommodate many more visitors that your average dwelling, apartment or condo. According to property licensing regulations, hotels accommodate twenty-five or more guests, BNBs up to fifteen rooms and motels must have at least six rental units. According to 2019 STR data, the combined census of 175 hotel, motel and BNB properties had over 10,000 rooms, an average of 58 rooms per property.

Dwellings make up the largest share of lodging properties in the Florida Keys

- Dwellings
  - 57%
- Hotels
  - 4%
- Motels
  - 9%
- Apartments & Condos
  - 26%
- BNB
  - 4%

Type of Lodging Property by Island District

- **Islamorada**
  - BNB: 1%
  - Dwelling: 1%
  - Hotels: 17%
  - Motels: 4%
  - Apartments & Condos: 1%
- **Key Largo**
  - BNB: 18%
  - Dwelling: 14%
  - Hotels: 31%
  - Motels: 10%
  - Apartments & Condos: 0%
- **Key West**
  - BNB: 17%
  - Dwelling: 9%
  - Hotels: 36%
  - Motels: 7%
  - Apartments & Condos: 1%
- **Lower Keys**
  - BNB: 15%
  - Dwelling: 5%
  - Hotels: 78%
  - Motels: 2%
  - Apartments & Condos: 1%
- **Marathon**
  - BNB: 16%
  - Dwelling: 20%
  - Hotels: 72%
  - Motels: 15%
  - Apartments & Condos: 0%

3 Apartments & Condos includes: Condominiums, Nontransient apartment (NAPT) and Transient Apartments (TAPT); Condos includes SNGL, CLCT and GRP properties.

Sources: Florida Department of Business and Professional Regulation Public Lodging Establishment Licenses, Monroe County TDC, STR
Overnight Lodging Choices of Visitors to the Florida Keys

In the charts on this next series of pages, we show visitor lodging preferences based on the location of the lodging property and whether they used EYW airport or another form of transportation to travel to the Keys. If the share of visitors staying at a particular property type is less than 1% the property type is not depicted on the charts.

- A higher proportion of visitors who fly into EYW airport stayed at dwellings (27% vs 15%) while visitors who didn’t use the airport were more likely to stay in motels (29% vs 18%) and in apartments & condos (31% vs 29%). These results are likely driven by a greater proportion of non-airport visitors staying in Key Largo, Islamorada and Marathon. These three island districts combined have roughly 70% of all the motels in the Keys.

**Florida Keys Comparison of Lodging Choice Between Airport Visitor & Non-Airport Visitor**

Source: Rockport Analytics, Uber Media

Apartments & Condos includes: Condominiums, Nontransient apartment (NAPT) and Transient Apartments (TAPT); Condos includes SNGL, CLCT and GRP properties
Apartments & condos make up about a third of lodging properties in Key Largo and hotels and motels combined make up roughly 18% of properties. Key Largo does not have any BNBs and more than half of the properties are dwellings.

Key Largo has 21% of all the motels in the Keys, 15% of the apartments & condos and 11% of both the hotels and dwellings.

Only 2% of airport visitors stayed in Key Largo compared to 16% of visitors using other forms of transportation. Key Largo’s proximity to mainland Florida makes it attractive for day trippers and for those traveling to the area through Miami (MIA) or Fort Lauderdale (FLL) airports.

Of those visitors who stayed at a property in Key Largo, EYW airport visitors were slightly more likely to stay in hotels or apartments & condos. Non-airport visitors were slightly more likely to stay in dwellings or motels.
Overnight Lodging Choices of Visitors to the Florida Keys: Islamorada

Dwellings make up about 63% of all the lodging properties in Islamorada while apartments & condos and motels make up roughly 17% and 18% of properties respectively. There is only one BNB and one hotel in Islamorada.

Islamorada has 28% of all the motels across the Keys, more than any other island district. Islamorada has 15% of all dwellings, 9% of apartments & condos and 2% of hotels and BNBs.

Only 2% of EYW visitors stayed in Islamorada compared to 13% of non-airport visitors.

Of those visitors who stayed at a property in Islamorada, EYW airport visitors were slightly more likely to stay in motels (41% vs 39%). Visitors who traveled using other transportation modes were more likely to stay in both dwellings (37% vs 36%) and in apartments & condos (22% vs 21%). Hotels were used at roughly the same rate by both visitor segments.
Over 70% of the lodging properties in Marathon are dwellings. Apartments & condos make up about 20% and hotels and motels combined make up roughly 7% of lodging properties. There are two BNBs in Marathon.

Marathon has 41% of all the motels across the Keys, more than any other island district. Marathon also has 25% of apartments & condos, second only to Key West.

Only 5% of EYW visitors stayed in Marathon compared to 17% of non-airport visitors.

Of those visitors who stayed at a property in Marathon, EYW airport visitors were slightly more likely to stay in both dwellings (21% vs 18%) and in apartments & condos (50% vs 49%). Non-airport visitors were slightly more likely to stay in hotels (12% vs 11%) and motels (21% vs 17%).
The lion’s share (78%) of lodging properties in the Lower Keys are dwellings. Apartments & condos make up about 15% of available properties in the Lower Keys and motels comprise 5% of the total. The island district has no hotels and only a few BNBs.

The Lower Keys has the least number of lodging properties in the Keys and the island district is home to 11% of the dwellings and 4% each of the BNBs, Motels and Apartments & Condos.

Roughly 2% of all visitors stayed in lodging properties in the Lower Keys.

Of those visitors who stayed at a property in the Lower Keys, EYW airport visitors were slightly more likely to stay in both dwellings (31% vs 24%) and in apartments & condos (15% vs 13%). Non-airport visitors were slightly more likely to stay in motels (62% vs 54%).
Overnight Lodging Choices of Visitors to the Florida Keys: Key West

Key West has 90% of the BNBs in the Keys and 75% of hotel properties. Key West also has almost half (47%) of the apartments & condos in the Keys.

EYW visitors who stayed in Key West were almost three times more likely to stay at a dwelling than non-airport visitors (28% vs 10%). Visitors who traveled using other modes of transportation were more likely to stay in apartments and condos (29% vs 27%), hotels (29% vs 22%) and motels (25% vs 16%).

Almost 90% of airport visitors stayed in Key West vs 52% of visitors using other forms of transportation. There is a clear difference in the property type selection in Key West between airport and non-airport visitors with those traveling via EYW significantly more likely to be staying at a dwelling rather than a hotel or motel.
Total visitor volume to the Florida Keys has increased steadily since 2014, except for declines in 2017 when Hurricane Irma took its toll on tourism. Between 2017 and 2019 both the number of vehicles on US 1 and passengers flying through EYW witnessed significant increases as tourism rebounded sharply following the Irma rebuild and the reopening of hotel and resort properties. Both 2018 and 2019 also brought about new and expanded service into EYW from a number of markets that helped to drive additional airport traffic.

While the increased service to EYW should help relieve pressure on the road and bridge infrastructure, the biennial traffic assessment study from Monroe County and the Florida Department of Transportation shows that passenger volumes rose and travel delays increased between 2017 and 2019. Further expansion of EYW service in 2021 could offer some additional relief.

Almost nine in ten visitors who travel through EYW airport stay in Key West. Those that fly into the Key West International Airport are significantly less likely to travel up the island chain and put additional stress on infrastructure. Of those flying into EYW, 2% took accommodation in the Lower Keys, 5% stayed in lodging in Marathon, 2% stayed in a property in Islamorada and 2% stayed in a property in Key Largo. Those who traveled to the Keys through other means (e.g., rental car, personal vehicle), on the other hand, are more likely to travel down the island chain with 16% taking accommodation in Key Largo, 13% in Islamorada, 17% in Marathon, 2% in the lower Keys and and 52% in Key West.

Over 40% of visitors who travel to Key West by means other than EYW are from Florida. The top DMA’s of origin are fairly similar between airport visitors and non-airport visitors to the Key West. The seasonality of airport visitation differs slightly from that of non-airport visitation with relatively more airport volume in the winter and early spring months – a popular period for air travel to the warm and sunny Florida Keys from the colder northern latitudes. The summer months are more likely to be busier times for visitors not flying through the EYW airport as many families and regional drive visitors make their way to the Keys.

Visitors who fly through EYW airport spend an average of $99.45 per day, this is about $30 (44%) more than visitors who arrive using other forms of transportation. Adding additional service to EYW will lead to a higher economic yield per visitor and significantly less strain on road and bridge infrastructure.

Airport visitors who stayed in Key West were almost three times more likely to stay at a dwelling than non-airport visitors (28% vs 10%). The decision to fly through EYW and remain in Key West likely plays a role in the type of lodging properties chosen by these visitors. Visitors who stay in one place, or for a longer period, might look for properties with amenities such as furnished kitchens, multiple rooms or private outdoor spaces.
Appendix: Lodging Property Definitions

**Hotel:** Any public lodging establishment containing sleeping room accommodations for 25 or more guests.

**Motel:** Any public lodging establishment which offers at least six rental units all of which have an exit to the outside, daily or weekly rates, off-street parking, a bathroom and a central office on the property with hours of operation.

**Bed and Breakfast Inn:** is a family home structure with no more than 15 sleeping rooms which provides accommodation and meal services.

**Non-transient apartment (NAPT):** A building or complex of buildings in which 75% or more of the units are available for rent to non transient tenants.

**Transient apartment (TAPT):** A building or complex of buildings in which more than 25% of the units are advertised or held as available for transient occupancy.

**Dwelling:** A single-family house, a townhouse, or a unit or group of units in a duplex, triplex, quadruplex, or other dwelling unit that has four or less units collectively.

**Condominium:** A unit or group of units in a property comprised entirely of units that share common elements that may be owned by one or more persons.

Sources: Florida Department of Business and Professional Regulation Public Lodging Establishment Licenses, Monroe County TDC