

## AMELIA ISLAND WEEKLY PERFORMANCE RECAP

This reporting period covers Sunday through Saturday, capturing the second half of the Memorial Day holiday weekend. The week continued to reflect a familiar trend, with soft hotel leisure demand offset by strong group business performance. Meanwhile, vacation rentals once again delivered substantial year-over-year growth, continuing to outperform other lodging segments.

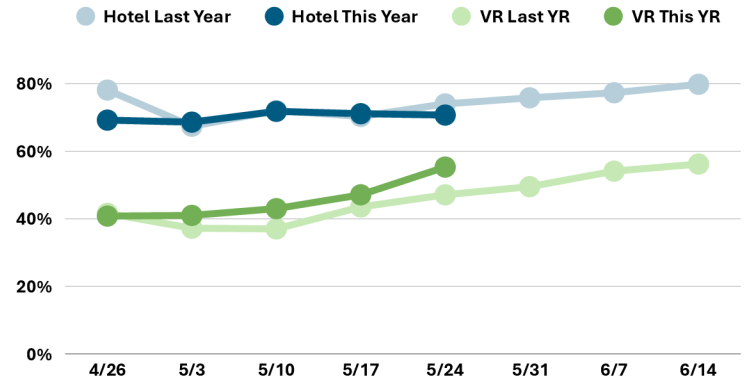
Guest night performance by segment compared to the same week last year was as follows:

Hotel Leisure: -27% | Hotel Group: +39% | Vacation Rentals: +15%

Hotels	Last Week	YOY % Change
<b>Occupancy</b>	<b>70.7%</b>	<b>-5.1%</b>
<b>Avg Daily Rate</b>	<b>\$374</b>	<b>+4.2%</b>
<b>RevPAR</b>	<b>\$265</b>	<b>-1.1%</b>

Vacation Rentals	Last Week	YOY % Change
<b>Occupancy*</b>	<b>55.3%</b>	<b>+12.1%</b>
<b>Avg Daily Rate</b>	<b>\$352</b>	<b>+1.9%</b>
<b>RevPAR</b>	<b>\$195</b>	<b>+14.3%</b>

## WEEKLY OCCUPANCY



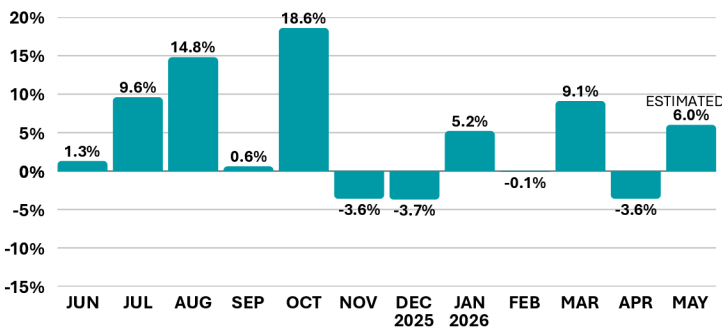
## LOOKING FORWARD

Summer travel is expected to remain resilient, however, the travelers feeling the greatest pressure on their budgets will likely seek ways to reduce travel costs. We anticipate an increase in travelers staying with family, sharing vacation rentals, driving instead of flying, traveling closer to home, shortening trip lengths, and reducing discretionary spending on dining and activities.

Despite these shifting consumer behaviors, June and July demand remains healthy across most lodging segments. Current booking pace is running 5% ahead of historical levels for Hotel Leisure, 18% ahead for Hotel Groups, and 3% ahead for Vacation Rentals, signaling continued strength through the heart of the summer season. Looking further ahead, August is beginning to emerge as a watchpoint for the hotel sector, with booking pace trending below expectations. In contrast, vacation rentals continue to gain momentum, with bookings currently pacing nearly 20% ahead of last year.

While the near-term outlook remains generally optimistic, August and beyond are beginning to show signs of soft demand. The CVB continues to monitor a variety of macroeconomic and travel-related factors, including consumer confidence, travel costs, and broader economic conditions, that may influence travel planning and spending decisions in the months ahead.

## LODGING TAXABLE SALES year over year comparison



## FUTURE BOOKING PACE vs this time last year

