WEEKLY LODGING INSIGHTS

JUNE 28 - JULY 4, 2026

AMELIA ISLAND WEEKLY PERFORMANCE RECAP

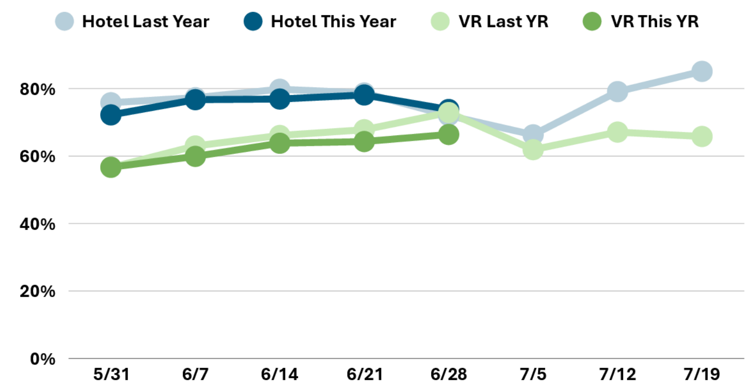
Last week continued a familiar trend for the hotel sector: higher room rates and strong group business helped offset softer leisure demand. Hotels achieved an Average Daily Rate (ADR) that was $32 higher than the same week last year, despite leisure demand declining 18% year over year. While group business accounted for roughly one-third of total hotel demand, it increased an impressive 151% compared to last year, providing a meaningful boost to overall occupancy.

Vacation rentals, meanwhile, experienced their first notable slowdown in several weeks, with guest nights declining nearly 20% compared to last year's exceptionally strong performance.

Hotels	Last Week	YOY % Change
Occupancy	73.8%	+3.8%
Avg Daily Rate	$424	+8.2%
RevPAR	$313	+12.2%

Vacation Rentals	Last Week	YOY % Change
Occupancy	66.3%	-9.1%
Avg Daily Rate	$424	+0.5%
RevPAR	$281	-8.8%

WEEKLY OCCUPANCY



LOOKING FORWARD

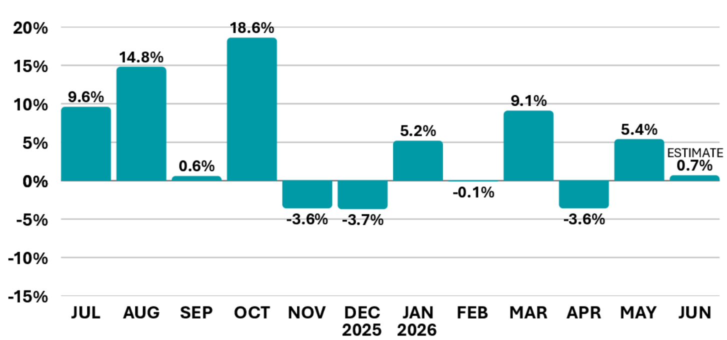
Group business and higher average daily rates continue to be the primary drivers of hotel performance, helping offset persistent softness in leisure demand over the past five months. July appears to be no exception, with group demand outperforming while leisure bookings remain slightly below last year's pace.

As noted in last week's update, August and September booking pace remains below expectations. Fortunately, there is still ample time for these months to improve. Historically, approximately 50% of August bookings and 70% of September bookings have yet to materialize. Encouragingly, last week brought a noticeable increase in Labor Day bookings, providing a much-needed boost to the September hotel leisure segment.

Vacation rentals continue to sustain strong momentum, posting 15 consecutive months of year-over-year demand growth. Booking pace for the next three months is currently 5.2% ahead of 2025, reflecting continued strength in the segment.

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