WEEKLY LODGING INSIGHTS

JULY 19-25, 2026

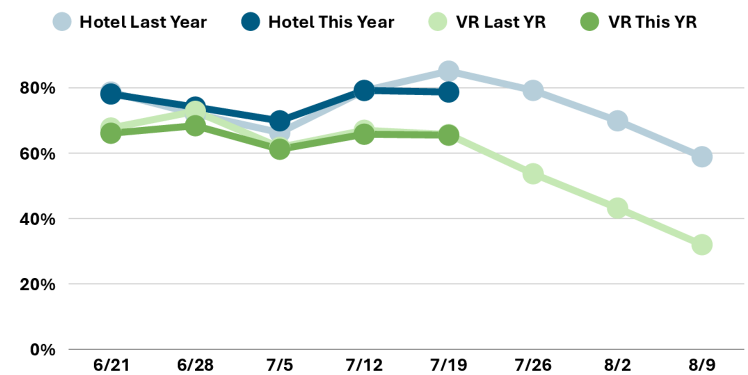
AMELIA ISLAND WEEKLY PERFORMANCE RECAP

Families are taking advantage of the final opportunity for a summer getaway. Last week's hotel occupancy held steady while strong pricing power persisted, with Average Daily Rate (ADR) increasing $19 compared to the same week last year, contributing to another solid week for hotel revenues. Vacation rental occupancy remained essentially unchanged from last year, while ADR also increased by $19 over the same period. As the summer season begins to wind down, the segment continues to benefit from travelers seeking flexible, value-oriented accommodations for last-minute family vacations.

Hotels	Last Week	YOY % Change
Occupancy	78.7%	-4.8%
Avg Daily Rate	$375	+5.3%
RevPAR	$296	+0.3%

Vacation Rentals	Last Week	YOY % Change
Occupancy	65.5%	-0.3%
Avg Daily Rate	$364	+5.5%
RevPAR	$239	+5.3%

WEEKLY OCCUPANCY



LOOKING FORWARD

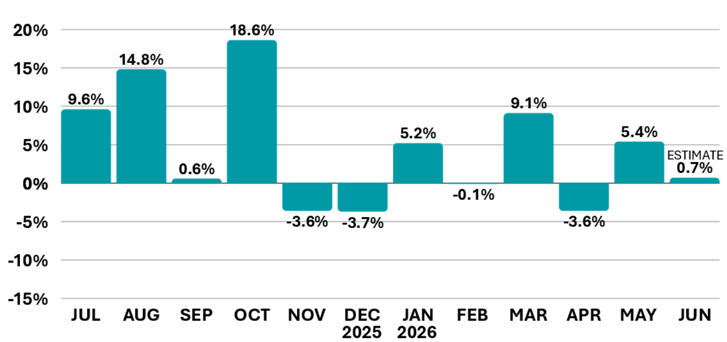
As the destination transitions from the peak summer season into fall, overall booking pace for August through October is currently 16% below expectations.

Leisure demand is hovering relatively flat, currently pacing 0.6% above last year over the next three months. September's outlook particularly benefits from the Labor Day calendar shift, as the holiday falls on September 7 this year rather than September 1 last year, shifting a portion of demand from August into September. When comparing Labor Day weekend directly, hotel leisure bookings are currently pacing nearly 6% ahead of last year's holiday weekend.

The more significant trend is the sharp decline in group booking pace. Group demand for the next three months is currently 31% below last year's pace, marking a substantial shift in the market. Over the past six months, groups, meetings, incentive travel, weddings, family reunions, and other organized travel have been the primary drivers of hotel performance, helping offset a softer leisure segment. As forward group bookings have weakened, the near-term outlook has become more challenging.

Vacation rentals are also beginning to moderate. Booking pace for the next three months is currently 6.1% below expectations. While September also benefits from the Labor Day calendar shift, booking activity during the remaining weeks is running below typical seasonal levels, suggesting demand is beginning to normalize following an extended period of exceptional growth.

LODGING TAXABLE SALES year over year comparison



FUTURE BOOKING PACE vs this time last year