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**Amelia Island  
Second Quarter 2018 (Apr. – Jun.)  
Visitor Profile**



***Prepared for:***

Amelia Island Tourist Development Council

***Prepared by:***

Research Data Services, Inc.

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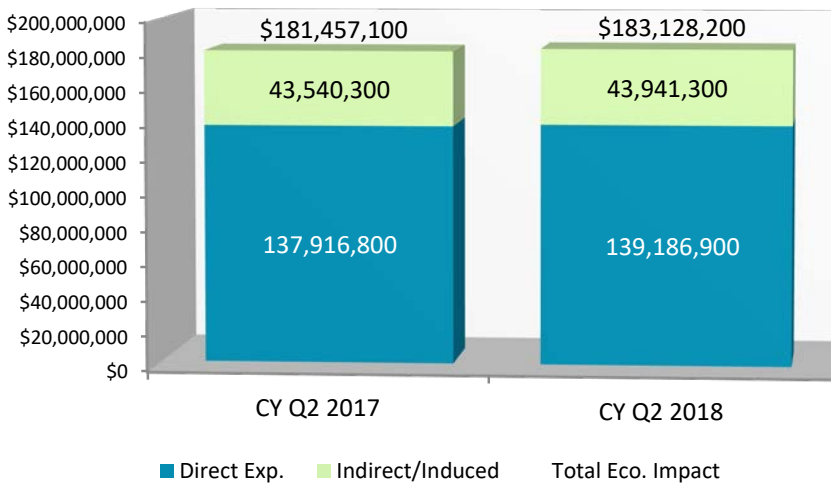
August 6, 2018



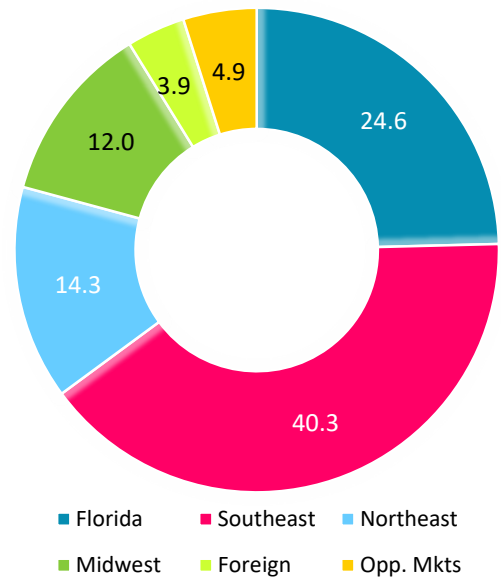
H/M/C/C* Visitor Stats	Fiscal Year-to-Date (Oct. - Jun.)			CY Second Quarter (Apr. - Jun.)		
	FYTD 2017	FYTD 2018	% Δ '17/'18	2017	2018	% Δ '17/'18
Visitors (#)	480,600	500,100	+4.1	183,400	182,900	-0.3
Direct Exp. (\$)	\$351,813,300	\$370,953,700	+5.4	\$137,916,800	\$139,186,900	+0.9
<b>Total Eco. Impact (\$)</b>	<b>\$462,880,700</b>	<b>\$488,063,800</b>	<i>(k: 1.3157)</i>	<b>\$181,457,100</b>	<b>\$183,128,200</b>	<i>(k: 1.3157)</i>
Taxable Ldg. Collections	\$99,645,302	\$106,058,096	+6.4	\$44,788,426	\$46,900,126	+4.7

\* Visitors staying in commercial lodging subject to the resort tax (hotel/motel/condo, etc.)

### CY Q2 Economic Impact



### CY Q2 2018 Visitor Origin Distribution (%)



### Fiscal Year-to-Date (Oct. - Jun.)

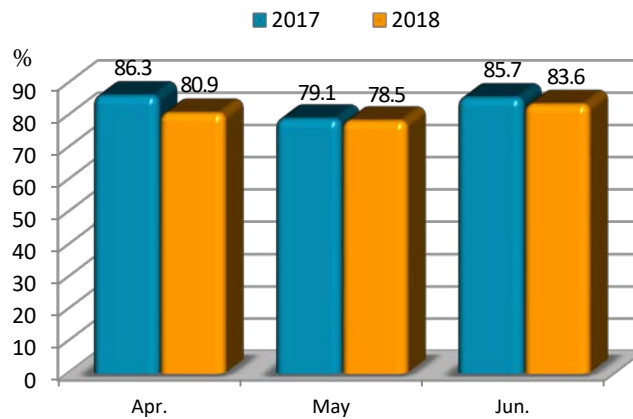
### CY Second Quarter (Apr. - Jun.)

Visitor Origins	Fiscal Year-to-Date (Oct. - Jun.)			CY Second Quarter (Apr. - Jun.)		
	FYTD 2017	FYTD 2018	% Δ '17/'18	2017 # of Visitors	2018 # of Visitors	% Δ '17/'18
Florida	102,041	106,920	+4.8	44,016	44,993	+2.2
Southeast	176,121	182,122	+3.4	76,294	73,709	-3.4
Northeast	81,939	88,395	+7.9	25,126	26,155	+4.1
Midwest	71,724	72,698	+1.4	21,458	21,948	+2.3
Foreign	28,108	26,024	-7.4	7,886	7,133	-9.5
Opportunity Mkts	20,667	23,941	+15.8	8,620	8,962	+4.0
<b>Total</b>	<b>480,600</b>	<b>500,100</b>	<b>+4.1</b>	<b>183,400</b>	<b>182,900</b>	<b>-0.3</b>

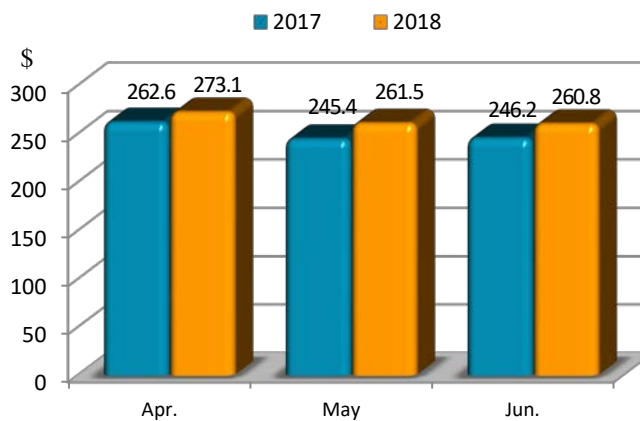
<b>Occupancy and ADR (STR)**</b>	<b>April</b>	<b>May</b>	<b>June</b>
Occupancy 2018	80.9%	78.5%	83.6%
Occupancy 2017 <sup>†</sup>	86.3	79.1	85.7
<b>Δ % Occ. ('17/'18)</b>	<b>-6.3%</b>	<b>-0.8%</b>	<b>-2.5%</b>
ADR 2018	\$273.06	\$261.48	\$260.84
ADR 2017 <sup>†</sup>	262.63	245.35	246.17
<b>Δ % ADR ('17/'18)</b>	<b>+4.0%</b>	<b>+6.6%</b>	<b>+6.0%</b>
RevPAR 2018	\$220.86	\$205.15	\$218.02
RevPAR 2017 <sup>†</sup>	226.78	194.07	211.06
<b>Δ % RevPAR ('17/'18)</b>	<b>-2.6</b>	<b>+5.7%</b>	<b>+3.3%</b>

\*\* Source: Smith Travel Research; <sup>†</sup> 2017 Update

### Occupancy (STR)



### Room Rates (STR)



## Second Quarter 2018 Top U.S. Feeder Markets

States of Origin: <i>Primary Markets</i>		2017	2018
1.	Georgia	27.6%	25.7%
2.	Florida	24.0	24.6
3.	New York/New Jersey	6.8	7.4
4.	South Carolina	4.4	5.2
5.	North Carolina	5.9	5.0

States of Origin: <i>Secondary Markets</i>		2017	2018
6.	Tennessee	2.9%	3.2%
7.	Pennsylvania	3.2	3.0
8.	Texas	2.5	2.7
9.	Ohio	3.1	2.6
10.	Virginia/D.C.	--	2.6

## Second Quarter 2018 Top U.S. Feeder Markets

<b>DMA's: Primary Markets</b>		<b>2017</b>	<b>2018</b>
1.	<b>Atlanta</b>	18.0%	14.6%
2.	<b>Jacksonville</b>	7.8	8.6
3.	<b>Greater Orlando Area</b>	6.8	7.1
4.	<b>New York/New Jersey</b>	4.3	4.6
5.	<b>Savannah</b>	3.6	3.8

<b>DMA's: Secondary Markets</b>		<b>2017</b>	<b>2018</b>
6.	<b>Tampa/St. Petersburg</b>	3.4%	3.0%
7.	<b>Charlotte</b>	2.6	2.4
8.	<b>Greenville</b>	1.9	2.3
9.	<b>Tallahassee</b>	2.1	2.0
10.	<b>Chicago</b>	1.9	1.8

**Visitor Profile Metrics:**

<b>Length of Stay (Days)</b>	<b>2017</b> <i>n = 693</i>	<b>2018</b> <i>n = 710</i>	
In Amelia Island	4.4 days	4.3 days	↓

<b>Party Size</b>	<b>2017</b>	<b>2018</b>	
Number of People	3.0 people	3.0 people	—

<b>Travel Party Composition</b> <i>(Multiple Response)</i>	<b>2017</b>	<b>2018</b>	
Couple	44.0%	48.3%	↑
Family	41.7	39.5	↓
Extended Family	12.2	9.0	↓
Group of Friends	7.1	7.9	↑
Single	4.3	4.0	↓

<b>Have Children or Young Adults In Immediate Travel Party</b>	<b>2017</b>	<b>2018</b>	
% Yes	33.6%	30.4%	↓

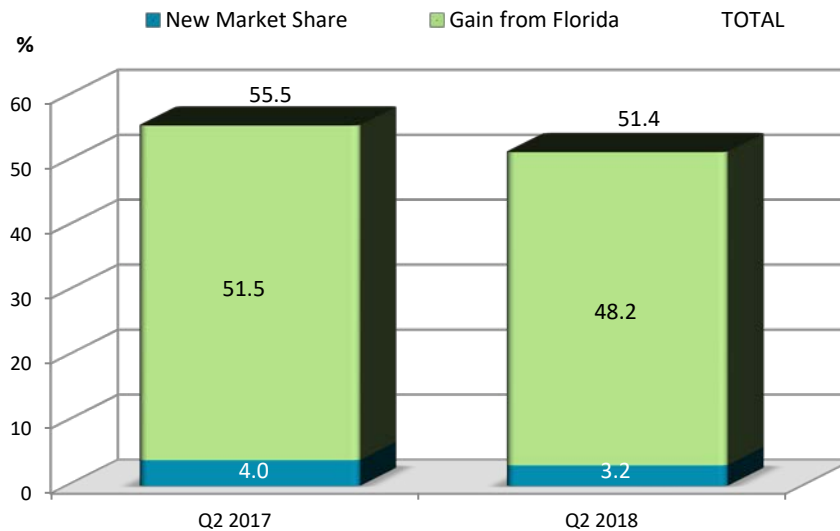
<b>Transportation Mode</b> <i>(Multiple Response)</i> <i>(Percentaged to the Base of All Respondents)</i>	<b>2017</b>	<b>2018</b>	
Personal Car/RV	69.5%	72.8%	↑
Plane	27.8	24.7	↓
Rental Car	22.3	19.6	↓

<b>Airport Deplaned</b> <i>(Base: Flew)</i>	<b>2017</b>	<b>2018</b>	
Jacksonville International	80.6%	84.6%	↑
Orlando International/Sanford	13.9	9.5	↓

Purpose of Trip (Multiple Response)	2017	2018	
Vacation	70.5%	69.4%	↓
A Getaway	18.3	21.7	↑
Visit with Friends/Relatives	10.2	9.9	↓
Special Event/Festival	9.8	9.5	↓
Business/Conference/Meeting	8.8	9.4	↑
Wedding/Honeymoon	5.1	3.4	↓

First Visit to (% yes)	2017	2018	
Amelia Island	55.5%	51.4%	↓
Florida	4.0	3.2	↓

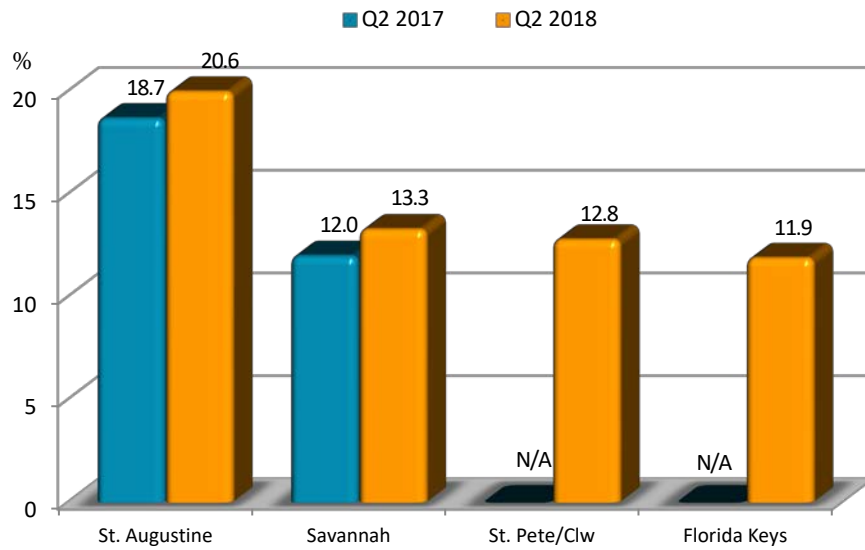
First Visit to Amelia Island (% Yes)



**Other Southeast Areas Considered for this Trip** (Open Ended Multiple Response)

	2017	2018	
Considered Only Amelia Island	48.9%	46.0%	↓
St. Augustine/Ponte Vedra	18.7	20.6	↑
Savannah	12.0	13.3	↑
St. Petersburg/Clearwater	--	12.8	—
Florida Keys	--	11.9	—
Orlando	10.8	10.4	↓
Jacksonville Area	9.6	9.5	↓
Jekyll Island	11.3	9.0	↓
Hilton Head	7.9	8.7	↑

**Other Areas Considered (Top Four)**

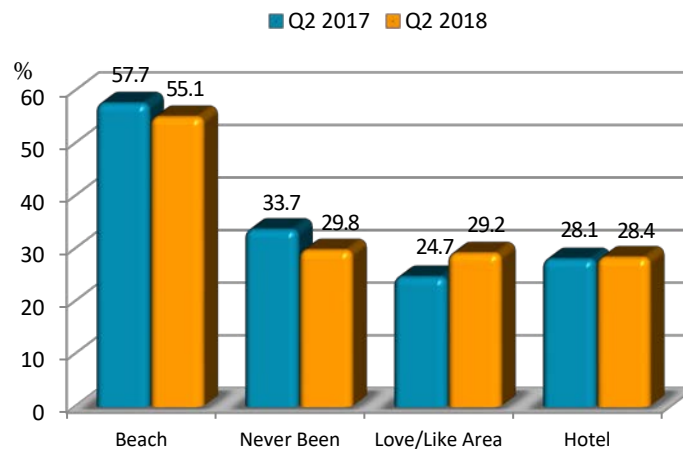




**Why Chose Amelia Island**  
(Multiple Response)

	2017	2018	
Beach	57.7%	55.1%	↓
Never Been/Try Something New	33.7	29.8	↓
Love/Like the Area	24.7	29.2	↑
Hotel/Accommodations	28.1	28.4	↑
Recommendation	28.6	27.6	↓
Nature/Environment	21.9	23.0	↑
History	18.0	22.4	↑
Appealing Brochures/Websites	24.4	22.2	↓
Weather	19.6	22.2	↑
Convenient Location	21.8	21.5	↓
Previous Experience	15.3	19.8	↑
Family Oriented Area	22.3	18.9	↓
Attractions	13.5	14.8	↑
Business/Meeting	9.7	9.8	↑
Event	10.0	9.1	↓
Visiting with Friends/Family	9.2	8.6	↓
On the Way/Enroute	5.8	4.9	↓

**Why Choose Amelia Island (Top Four)**



<b>Travel Planning Window</b>	<b>2017</b>	<b>2018</b>	
How Far in Advance Start Planning Trip	57.1 days	51.9 days	↓
How Far in Advance Book Reservations	34.7 days	33.7 days	↓

<b>Information Most Helpful to Visit</b> <i>(Multiple Response)</i>	<b>2017</b>	<b>2018</b>	
Internet	87.9%	89.6%	↑
Previous Visit	33.8	36.5	↑
Hotel/Accommodations	25.9	29.6	↑
Recommendation	31.2	28.0	↓
Print Media	18.7	17.9	↓
Maps	11.7	10.6	↓
Family	7.2	7.6	↑
Special Event	7.7	7.2	↓
Business/Conference/Meeting	5.4	6.4	↑

<b>Satisfaction with Amelia Island</b>	<b>2017</b>	<b>2018</b>	
Very Satisfied	87.3%	88.4%	↑
Satisfied	8.7	7.1	↓
Satisfaction Level <i>(Combined)</i>	<b>96.0%</b>	<b>95.5%</b>	↓

<b>Recommend Amelia Island to Friends/Relatives</b>	<b>2017</b>	<b>2018</b>	
% Yes	97.5%	95.9%	↓

<b>Plan to Return (% Yes)</b>	<b>2017</b>	<b>2018</b>	
To Local Area	87.7%	89.1%	↑

<b>Demographics</b>	<b>2017</b>	<b>2018</b>	
Average Age Head of Household (years)	48.4	49.7	↑
Median Annual Household Income	\$129,054	\$127,550	↓
% Household Income of \$100,000+	69.5%	67.8%	↓

<b>Seen/Read/Heard Amelia Island Information</b>	<b>2017</b>	<b>2018</b>	
% Yes	41.2%	44.0%	↑

<b>Influenced by Amelia Island Information</b>	<b>2017</b>	<b>2018</b>	
<i>(Base: Respondents Reporting Seen/Heard/Read)</i>	60.7%	64.7%	↑

<b>Avg. Party Budget Breakdown</b>	<b>2017</b>	<b>2018</b>	
Accommodations	\$1,023	\$1,057	↑
Restaurant Food/Beverage	476	466	↓
Grocery Store	61	56	↓
Admissions to Attractions	72	80	↑
Other Entertainment	91	99	↑
Retail Purchases	256	261	↑
Miscellaneous	276	264	↓

<b>Amelia Island Base Budget</b>	<b>2017</b>	<b>2018</b>	
Total	\$2,255	\$2,283	↑
Per Person/Stay	752	761	↑
Per Person/Day	171	177	↑

<b>Used Internet to Get Travel Information for this Trip</b>	<b>2017</b>	<b>2018</b>	
Yes	94.2%	91.8%	↓

<b>Booked Travel for this Trip on the Internet</b>	<b>2017</b>	<b>2018</b>	
Yes	73.5%	75.1%	↑

Activities Enjoyed (Multiple Response)	2017	2018	
Beach	86.5%	88.5%	↑
Dining Out	83.0	86.5	↑
Historic Downtown	84.1	85.1	↑
Relaxing	67.3	70.7	↑
Walking on the Beach	67.0	67.8	↑
Shopping	55.2	57.8	↑
Sight Seeing	43.8	48.1	↑
Pool	36.5	38.6	↑
State Park	33.3	37.2	↑
Shelling	35.9	36.1	↑
Reading	30.9	34.7	↑
Swimming	32.7	32.0	↓
Attractions	26.5	30.5	↑
Wildlife/Environment	27.8	29.1	↑
Bars/Nightlife	17.5	21.7	↑
Antiquing	22.9	20.9	↓
Art Galleries	14.8	17.9	↑
Exercising	18.4	17.2	↓
Water Cruise	13.8	13.9	↑
Farmers Market	9.9	10.7	↑
Visiting with Friends/Relatives	9.4	8.2	↓
Golfing	7.6	6.9	↓
Fishing	5.0	6.1	↑

Attributes that Describe Amelia Island Well	2017	2018	
Beautiful Beaches	82.1%	79.9%	↓
Clean Environment	72.2	74.8	↑
Good Food and Restaurants	74.7	74.1	↓
Historic Downtown	70.9	70.0	↓
Safe Destination	67.7	69.1	↑
Family Friendly	69.0	67.1	↓
Complete Relaxation	59.6	63.4	↑
A Romantic Place	48.6	52.6	↑
Upscale Accommodations	52.1	51.8	↓
Good Value for the Money	45.9	44.2	↓
State Parks	33.9	35.4	↑
Activities for All Ages	26.1	26.3	↑
Art Galleries	11.6	14.4	↑
Good Water Sports	11.5	7.4	↓
Good Golfing	9.0	7.0	↓
Good Fishing	6.1	6.9	↑

Attributes that Describe Amelia Island Well (Top Five)

