

# RESEARCH DATA SERVICES, INC.

777 SOUTH HARBOUR ISLAND BOULEVARD • SUITE 260  
TAMPA, FLORIDA 33602  
TEL (813) 254-2975 • FAX (813) 223-2986

## Amelia Island Second Quarter 2019 *(April – June)* Visitor Profile



***Prepared for:***

Amelia Island Tourist Development Council

***Prepared by:***

Research Data Services, Inc.

**[Research@ResearchDataLLC.com](mailto:Research@ResearchDataLLC.com)**

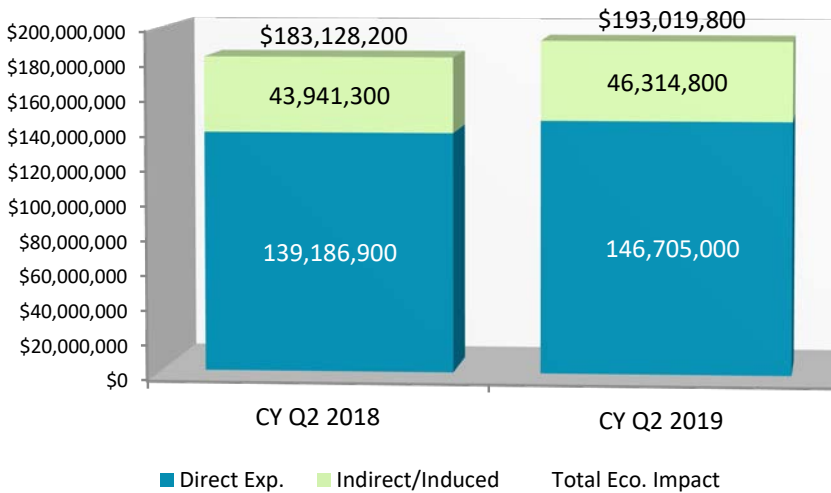
September 2019



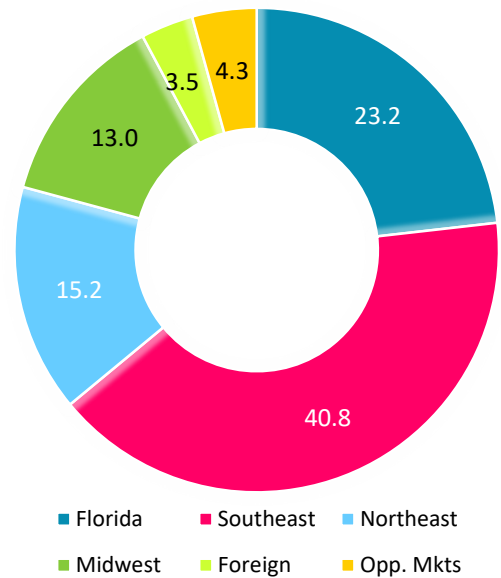
H/M/C/C* Visitor Stats	Fiscal Year-to-Date (Oct. - Jun.)			CY Second Quarter (Apr. - Jun.)		
	FYTD 2018	FYTD 2019	% Δ '18/'19	2018	2019	% Δ '18/'19
Visitors (#)	500,100	518,600	+3.7	182,900	185,000	+1.1
Direct Exp. (\$)	\$370,953,700	\$395,484,200	+6.6	\$139,186,900	\$146,705,000	+5.4
<b>Total Eco. Impact (\$)</b>	<b>\$488,063,800</b>	<b>\$520,338,600</b>	<i>(k: 1.3157)</i>	<b>\$183,128,200</b>	<b>\$193,019,800</b>	<i>(k: 1.3157)</i>
Taxable Ldg. Collections	\$105,610,980	\$113,960,945	+7.9	\$46,453,010	\$48,284,444	+3.9

\* Visitors staying in commercial lodging subject to the resort tax (hotel/motel/condo, etc.)  
June 2019 Taxable Lodging Collections represent a preliminary estimate.

### CY Q2 Economic Impact



### CY Q2 2019 Visitor Origin Distribution (%)



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

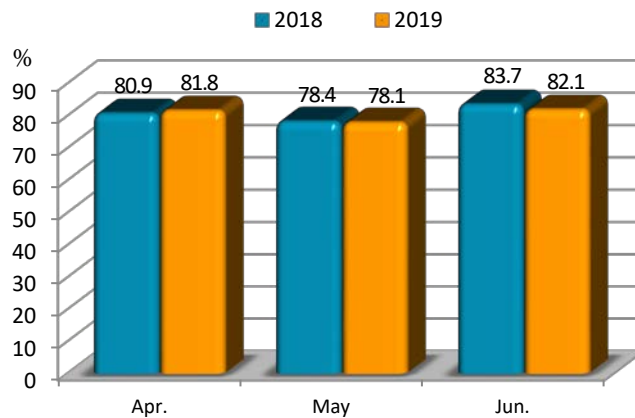
### CY Second Quarter (Apr. - Jun.)

Visitor Origins	Fiscal Year-to-Date (Oct. - Jun.)			CY Second Quarter (Apr. - Jun.)		
	FYTD 2018	FYTD 2019	% Δ '18/'19	2018 # of Visitors	2019 # of Visitors	% Δ '18/'19
Florida	106,920	108,142	+1.1	44,993	42,920	-4.6
Southeast	182,122	191,608	+5.2	73,709	75,480	+2.4
Northeast	88,395	88,129	-0.3	26,155	28,120	+7.5
Midwest	72,698	78,868	+8.5	21,948	24,050	+9.6
Foreign	26,024	27,945	+7.4	7,133	6,475	-9.2
Opportunity Mkts	23,941	23,908	-0.1	8,962	7,955	-11.2
<b>Total</b>	<b>500,100</b>	<b>518,600</b>	<b>+3.7</b>	<b>182,900</b>	<b>185,000</b>	<b>+1.1</b>

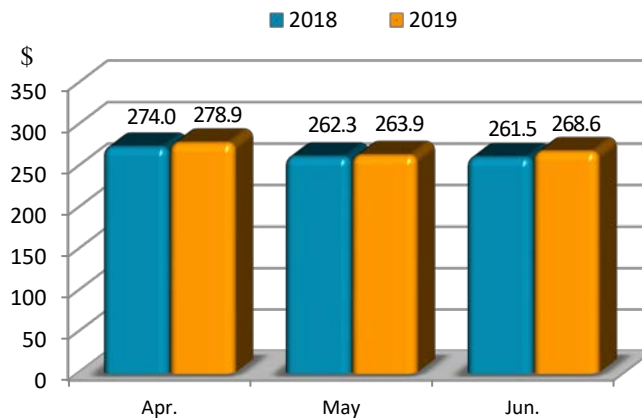
Occupancy and ADR (STR)**	April	May	June
Occupancy 2019	81.8%	78.1%	82.1%
Occupancy 2018 †	80.9	78.4	83.7
Δ % Occ. ('18/'19)	+1.2%	-0.4%	-2.0%
ADR 2019	\$278.92	\$263.93	\$268.59
ADR 2018 †	274.02	262.27	261.53
Δ % ADR ('18/'19)	+1.8%	+0.6%	+2.7%
RevPAR 2019	\$228.17	\$206.12	\$220.39
RevPAR 2018 †	221.57	205.71	218.93
Δ % RevPAR ('18/'19)	+3.0%	+0.2%	+0.7%

\*\* Source: Smith Travel Research; † 2018 Update

Occupancy (STR)



Room Rates (STR)



## Second Quarter 2019 Top U.S. Feeder Markets

States of Origin: <i>Primary Markets</i>		2018	2019
1.	Georgia	25.7%	23.8%
2.	Florida	24.6	23.2
3.	New York/New Jersey	7.4	6.5
4.	South Carolina	5.2	5.8
5.	North Carolina	5.0	5.7

States of Origin: <i>Secondary Markets</i>		2018	2019
6.	Tennessee	3.2%	3.6%
7.	Pennsylvania	3.0	3.4
8.	Texas	2.7	3.2
9.	Ohio	2.6	3.1
10.	Michigan	--	2.5

## Second Quarter 2019 Top U.S. Feeder Markets

<b>DMA's: Primary Markets</b>		<b>2018</b>	<b>2019</b>
1.	<b>Atlanta</b>	14.6%	14.3%
2.	<b>Jacksonville</b>	8.6	7.9
3.	<b>Greater Orlando Area</b>	7.1	6.5
4.	<b>Savannah</b>	3.8	4.1
5.	<b>New York/New Jersey</b>	4.6	3.9

<b>DMA's: Secondary Markets</b>		<b>2018</b>	<b>2019</b>
6.	<b>Tampa/St. Petersburg</b>	3.0%	3.5%
7.	<b>Charlotte</b>	2.4	3.0
8.	<b>Greenville</b>	2.3	2.5
9.	<b>Chicago</b>	1.8	2.2
10.	<b>Boston</b>	--	2.2

**Visitor Profile Metrics:**

	2018 <i>n = 710</i>	2019 <i>n = 611</i>	
<b>Length of Stay (Days)</b>			
In Amelia Island	4.3 days	4.4 days	↑

	2018	2019	
<b>Party Size</b>			
Number of People	3.0 people	3.1 people	↑

<b>Travel Party Composition</b> (Multiple Response)	2018	2019	
Couple	48.3%	45.9%	↓
Family	39.5	40.5	↑
Extended Family	9.0	12.5	↑
Group of Friends	7.9	9.3	↑
Single	4.0	4.2	↑

<b>Have Children or Young Adults In Immediate Travel Party</b>	2018	2019	
% Yes	30.4%	32.6%	↑

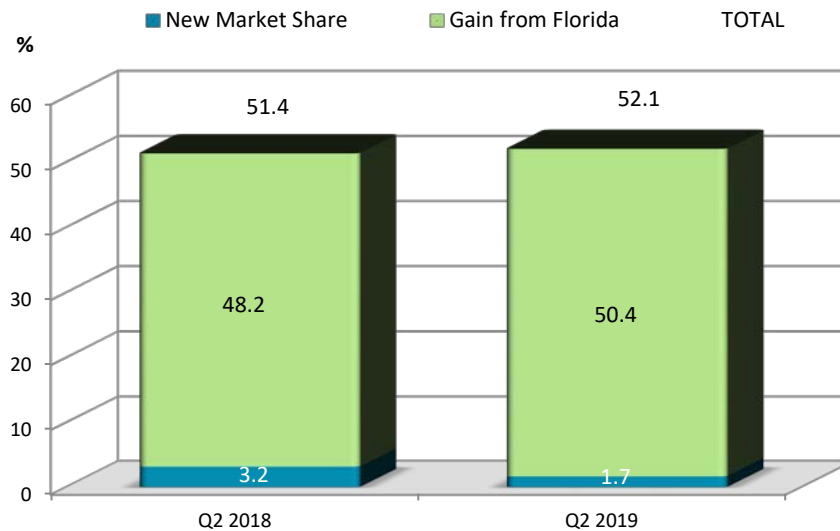
<b>Transportation Mode (Multiple Response)</b> (Percentaged to the Base of All Respondents)	2018	2019	
Personal Car/RV	72.8%	71.6%	↓
Plane	24.7	26.6	↑
Rental Car	19.6	20.0	↑

<b>Airport Deplaned (Base: Flew)</b>	2018	2019	
Jacksonville International	84.6%	82.0%	↓
Orlando International/Sanford	9.5	10.5	↑

Purpose of Trip (Multiple Response)	2018	2019	
Vacation	69.4%	68.1%	↓
A Getaway	21.7	19.9	↓
Special Event/Festival	9.5	11.4	↑
Business/Conference/Meeting	9.4	10.6	↑
Visit with Friends/Relatives	9.9	8.5	↓
Wedding/Honeymoon	3.4	4.7	↑
Guy/Girls Trip	--	4.3	—

First Visit to (% yes)	2018	2019	
Amelia Island	51.4%	52.1%	↑
Florida	3.2	1.7	↓

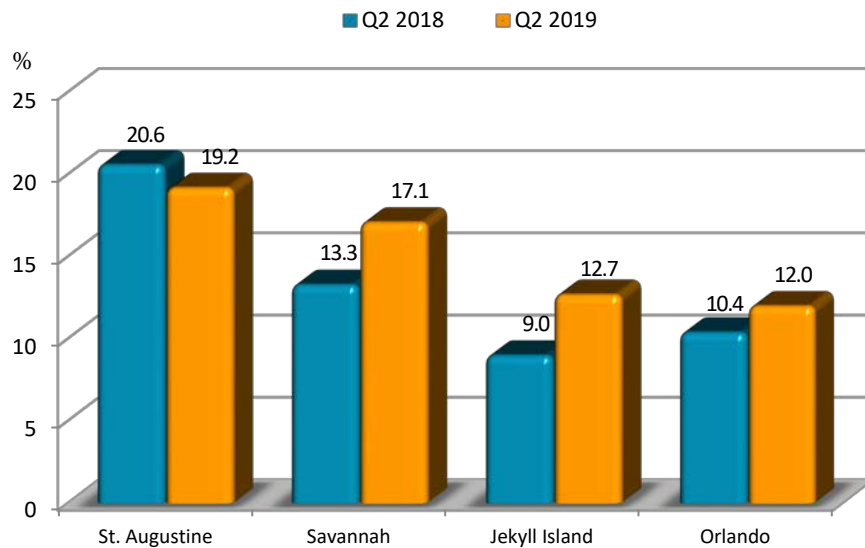
First Visit to Amelia Island (% Yes)



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

	2018	2019	
Considered Only Amelia Island	46.0%	47.3%	↑
St. Augustine/Ponte Vedra	20.6	19.2	↓
Savannah	13.3	17.1	↑
Jekyll Island	9.0	12.7	↑
Orlando	10.4	12.0	↑
Hilton Head	8.7	10.3	↑
Florida Keys	11.9	9.4	↓
St. Petersburg/Clearwater	12.8	8.7	↓
Jacksonville Area	9.5	8.6	↓
Charleston	--	8.3	—

**Other Areas Considered (Top Four)**

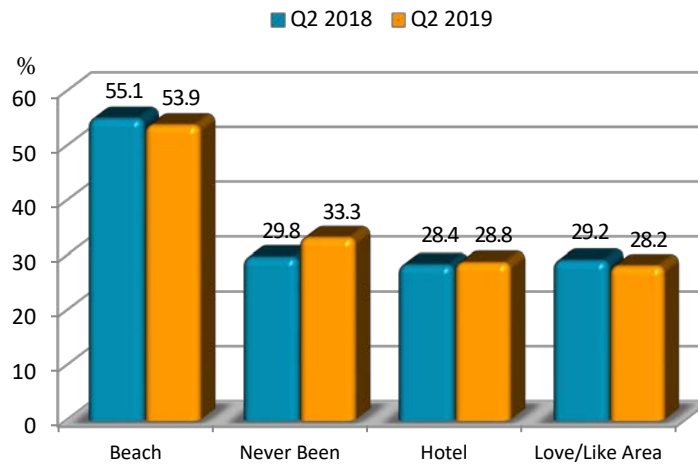




**Why Chose Amelia Island**  
(Multiple Response)

	2018	2019	
Beach	55.1%	53.9%	↓
Never Been/Try Something New	29.8	33.3	↑
Hotel/Accommodations	28.4	28.8	↑
Love/Like the Area	29.2	28.2	↓
Recommendation	27.6	25.8	↓
Nature/Environment	23.0	24.6	↑
Appealing Brochures/Websites	22.2	24.1	↑
Weather	22.2	21.3	↓
Family Oriented Area	18.9	20.9	↑
History	22.4	19.9	↓
Convenient Location	21.5	19.9	↓
Attractions	14.8	18.5	↑
Previous Experience	19.8	17.5	↓
Business/Meeting	9.8	10.9	↑
Event	9.1	10.4	↑
Visiting with Friends/Family	8.6	9.9	↑
On the Way/Enroute	4.9	7.8	↑

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



<b>Travel Planning Window</b>	<b>2018</b>	<b>2019</b>	
How Far in Advance Start Planning Trip	51.9 days	49.5 days	↓
How Far in Advance Book Reservations	33.7 days	34.9 days	↑

<b>Information Most Helpful to Visit</b> <i>(Multiple Response)</i>	<b>2018</b>	<b>2019</b>	
Internet	89.6%	90.5%	↑
Hotel/Accommodations	29.6	34.6	↑
Previous Visit	36.5	33.1	↓
Recommendation	28.0	27.3	↓
Print Media	17.9	15.7	↓
Maps	10.6	13.7	↑
Mobile App	--	13.2	—
Family	7.6	9.2	↑
Special Event	7.2	8.6	↑
Business/Conference/Meeting	6.4	7.5	↑
Social Media	--	4.1	—

<b>Satisfaction with Amelia Island</b>	<b>2018</b>	<b>2019</b>	
Very Satisfied	88.4%	85.0%	↓
Satisfied	7.1	11.9	↑
Satisfaction Level <i>(Combined)</i>	<b>95.5%</b>	<b>96.9%</b>	↑

<b>Recommend Amelia Island to Friends/Relatives</b>	<b>2018</b>	<b>2019</b>	
% Yes	95.9%	97.1%	↑

<b>Plan to Return (% Yes)</b>	<b>2018</b>	<b>2019</b>	
To Local Area	89.1%	90.1%	↑

Demographics	2018	2019	
Average Age Head of Household (years)	49.7	49.1	↓
Median Annual Household Income	\$127,550	\$129,108	↑
% Household Income of \$100,000+	67.8%	68.3%	↑

Seen/Read/Heard Amelia Island Information	2018	2019	
% Yes	44.0%	46.0%	↑

Influenced by Amelia Island Information	2018	2019	
<i>(Base: Respondents Reporting Seen/Heard/Read)</i>	64.7%	68.4%	↑

Avg. Party Budget Breakdown	2018	2019	
Accommodations	\$1,057	\$1,150	↑
Restaurant Food/Beverage	466	498	↑
Grocery Store	56	71	↑
Admissions to Attractions	80	91	↑
Other Entertainment	99	95	↓
Retail Purchases	261	280	↑
Miscellaneous	264	272	↑

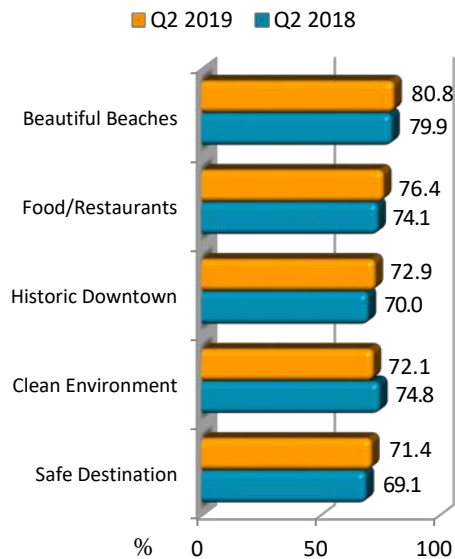
Amelia Island Base Budget	2018	2019	
Total	\$2,283	\$2,457	↑
Per Person/Stay	761	793	↑
Per Person/Day	177	180	↑

Activities Enjoyed (Multiple Response)	2018	2019	
Historic Downtown	85.1%	88.2%	↑
Beach	88.5	83.8	↓
Dining Out	86.5	82.7	↓
Relaxing	70.7	68.4	↓
Shopping	57.8	60.5	↑
Sight Seeing	48.1	48.9	↑
State Park	37.2	38.1	↑
Shelling	36.1	36.7	↑
Reading	34.7	31.2	↓
Swimming	32.0	29.7	↓
Attractions	30.5	29.5	↓
Wildlife/Nature/Bird Watching	29.1	28.8	↓
Bars/Nightlife	21.7	19.4	↓
Art Galleries	17.9	18.7	↑
Antiquing	20.9	18.3	↓
Exercising/Wellness	17.2	16.4	↓
Water Cruise	13.9	14.3	↑
Biking	--	12.6	—
Visiting with Friends/Relatives	15.7	12.2	↓
Farmers Market	10.7	11.6	↑
Festivals	--	9.4	—
Boating/Watercraft	--	8.4	—
Fishing	6.1	7.9	↑
Golfing	6.9	4.5	↓

**Attributes that Describe Amelia Island Well**

	2018	2019	
Beautiful Beaches	79.9%	80.8%	↑
Good Food and Restaurants	74.1	76.4	↑
Historic Downtown	70.0	72.9	↑
Clean Environment	74.8	72.1	↓
Safe Destination	69.1	71.4	↑
Family Friendly	67.1	63.4	↓
Complete Relaxation	63.4	59.8	↓
Upscale Accommodations	51.8	49.5	↓
A Romantic Place	52.6	48.3	↓
Good Value for the Money	44.2	41.4	↓
State Parks	35.4	38.6	↑
Activities for All Ages	26.3	23.2	↓
Art Galleries	14.4	15.9	↑
Good Water Sports	7.4	9.9	↑
Good Fishing	6.9	8.4	↑
Good Golfing	7.0	6.5	↓

**Attributes that Describe Amelia Island Well (Top Five)**



## Amelia Island Assets

- Overall, survey respondents who visited Amelia Island’s beaches in the second quarter of 2019 rate them 4.67 (on a five point scale where five is excellent), with seven out of ten (70.3%) giving the destination’s beaches a score of five (excellent).
- Specifically in terms of cleanliness, the beaches rate 4.72 on the same scale, with 72.6% giving a five (excellent) rating.
- Respondents who visited historic downtown Fernandina Beach say that they frequent the downtown area an average of 3.0 times during their stay.
- Afternoons are the preferred time to visit historic downtown Fernandina Beach with respondents citing the following visit times (*multiple response*):
 

○ Morning	46.2%
○ Afternoon	77.3%
○ Evening	70.1%
- The following amenities draw visitors to historic downtown Fernandina Beach (*multiple response*):
 

○ Dining	91.7%
○ Shopping	80.2%
○ Sight seeing	68.0%
○ River cruise	20.9%
○ Antique shops	15.6%
○ Art galleries	14.0%
○ Nightlife	13.7%
○ Amelia Island History Museum	13.4%
○ Events	7.0%
- Many respondents could not think of anything else that they would like to see downtown, offering comments like “all I anticipated and more” and “I was really impressed with your downtown.” Others took the opportunity to mention things that they like about the downtown area now including:
 

○ Music (Sounds on Centre)	○ Fountains
○ Horse and buggy tours	○ Pet friendliness
○ River cruises	○ Free parking
○ Farmers market	○ Family/child friendliness
○ Statues (great photo ops)	○ Restaurants
○ Flowers	○ Signage
○ Benches	

- Suggestions from respondents for additions to the downtown area include:
  - Drugstore
  - Bike lanes
  - Bike/scooter rentals
  - More shade
  - More coffee shops/Starbucks
  - Make parts of Centre Street pedestrian only
  - Finish the marina
  - Park/children's play areas
  - More shops/cafes
  - More nightlife
  - More public restrooms/drinking fountains
  - Sunset parties
  - No trains
  - More activities along the waterfront
  - More parking by the waterfront
  - More family oriented restaurants
  - Fewer offices on Centre Street
  - Better signage for businesses on side streets
  - More outdoor/rooftop dining
  - Map of walking/cycling paths
  - More historical information regarding old houses (when built, who lived there, etc.)