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Amelia Island Third Quarter 2018 (*Jul. – Sep.*) Visitor Profile



Prepared for:

Amelia Island Tourist Development Council

Prepared by:

Research Data Services, Inc.

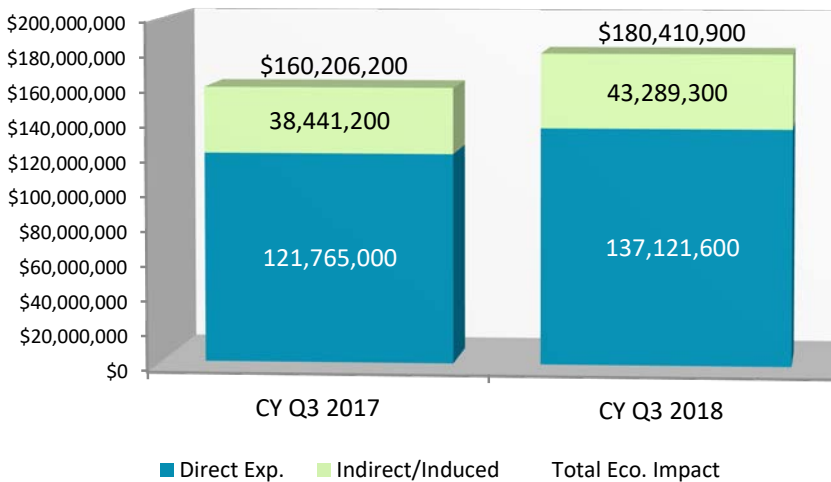
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November 1, 2018

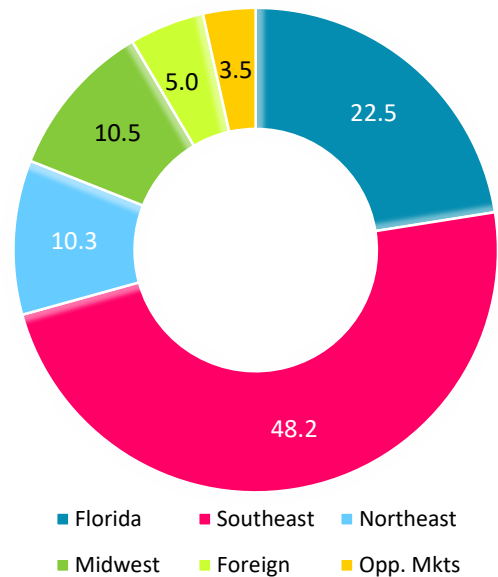
H/M/C/C* Visitor Stats	Fiscal Year (Oct. - Sep.)			CY Third Quarter (Jul. - Sep.)		
	FY 2017	FY 2018	% Δ '17/'18	2017	2018	% Δ '17/'18
Visitors (#)	652,100	684,900	+5.0	171,500	184,800	+7.8
Direct Exp. (\$)	\$473,578,300	\$508,075,300	+7.3	\$121,765,000	\$137,121,600	+12.6
Total Eco. Impact (\$)	\$623,086,900	\$668,474,700	<i>(k: 1.3157)</i>	\$160,206,200	\$180,410,900	<i>(k: 1.3157)</i>

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

CY Q3 Economic Impact



CY Q3 2018 Visitor Origin Distribution (%)



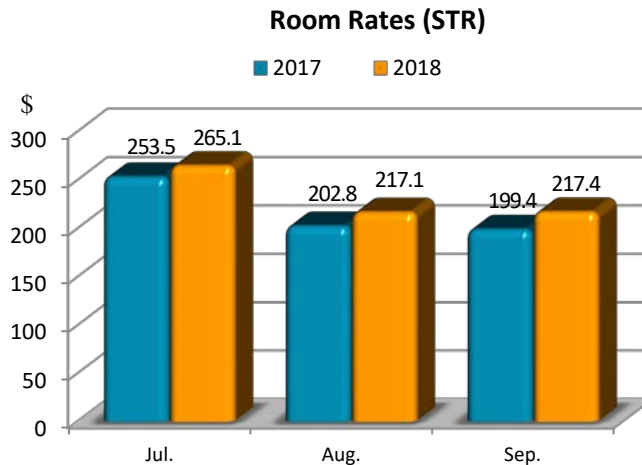
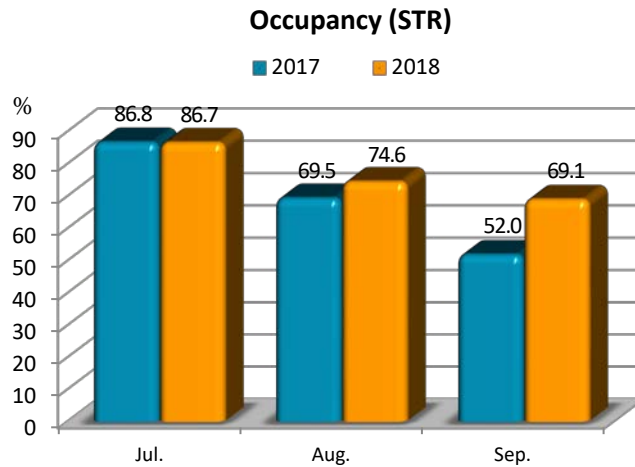
Fiscal Year (Oct. - Sep.)

CY Third Quarter (Jul. - Sep.)

Visitor Origins	Fiscal Year (Oct. - Sep.)			CY Third Quarter (Jul. - Sep.)		
	FY 2017	FY 2018	% Δ '17/'18	2017 # of Visitors	2018 # of Visitors	% Δ '17/'18
Florida	143,887	148,500	+3.2	41,846	41,580	-0.6
Southeast	255,869	271,196	+6.0	79,748	89,074	+11.7
Northeast	101,147	107,429	+6.2	19,208	19,034	-0.9
Midwest	87,845	92,102	+4.8	16,121	19,404	+20.4
Foreign	37,026	35,264	-4.8	8,918	9,240	+3.6
Opportunity Mkts	26,326	30,409	+15.5	5,659	6,468	+14.3
Total	652,100	684,900	+5.0	171,500	184,800	+7.8

Occupancy and ADR (STR)**	July	August	September
Occupancy 2018	86.7%	74.6%	69.1%
Occupancy 2017 †	86.8	69.5	52.0
Δ % Occ. ('17/'18)	-0.1%	+7.3%	+32.8%
ADR 2018	\$265.07	\$217.12	\$217.41
ADR 2017 †	253.52	202.80	199.41
Δ % ADR ('17/'18)	+4.6%	+7.1%	+9.0%
RevPAR 2018	\$229.74	\$162.01	\$150.13
RevPAR 2017 †	220.01	141.04	103.68
Δ % RevPAR ('17/'18)	+4.4%	+14.9%	+44.8%

** Source: Smith Travel Research; † 2017 Update



Third Quarter 2018 Top U.S. Feeder Markets

States of Origin: <i>Primary Markets</i>		2017	2018
1.	Georgia	27.8%	28.5%
2.	Florida	24.4	22.5
3.	South Carolina	5.3	5.8
4.	North Carolina	4.2	5.1
5.	New York/New Jersey	5.1	4.7

States of Origin: <i>Secondary Markets</i>		2017	2018
6.	Tennessee	4.0%	3.7%
7.	Ohio	2.4	3.0
8.	Virginia/Washington, D.C.	2.1	2.7
9.	Texas	2.5	2.3
10.	Pennsylvania	2.1	2.3

Third Quarter 2018 Top U.S. Feeder Markets

DMA's: Primary Markets		2017	2018
1.	Atlanta	18.5%	18.2%
2.	Jacksonville	7.1	6.9
3.	Greater Orlando Area	6.5	6.1
4.	Savannah	3.7	3.9
5.	Tampa/St. Petersburg	3.3	3.5

DMA's: Secondary Markets		2017	2018
6.	New York/New Jersey	3.9%	3.2%
7.	Charlotte	2.6	3.0
8.	Greenville/Spartanburg	2.4	2.6
9.	Tallahassee	2.1	2.4
10.	Virginia/Washington, D.C.	--	2.1

Visitor Profile Metrics:

	2017 <i>n = 622</i>	2018 <i>n = 656</i>	
Length of Stay (Days)			
In Amelia Island	4.2 days	4.3 days	↑

	2017	2018	
Party Size			
Number of People	3.2 people	3.1 people	↓

Travel Party Composition (Multiple Response)	2017	2018	
Couple	44.7%	46.1%	↑
Family	40.4	38.3	↓
Group of Friends	7.5	7.1	↓
Single	4.5	5.9	↑
Extended Family	7.3	5.0	↓

Have Children or Young Adults In Immediate Travel Party	2017	2018	
% Yes	35.7%	33.3%	↓

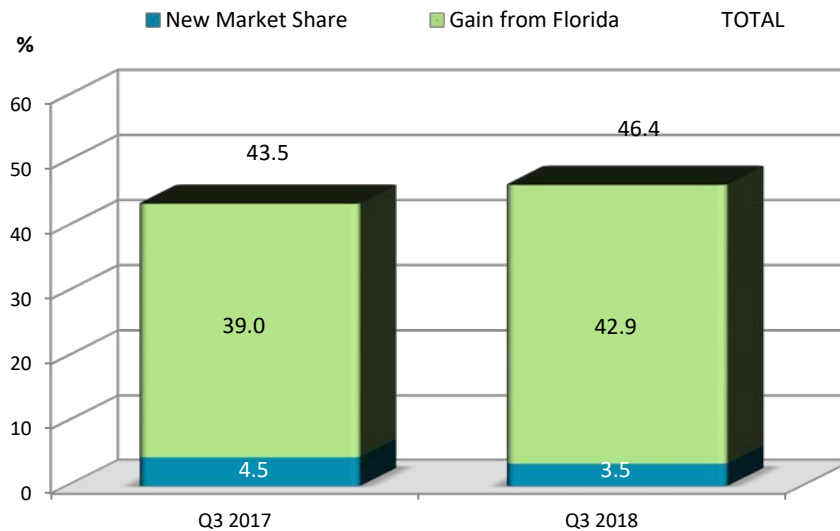
Transportation Mode (Multiple Response) (Percentaged to the Base of All Respondents)	2017	2018	
Personal Car/RV	72.6%	76.6%	↑
Plane	26.6	22.1	↓
Rental Car	22.2	16.9	↓

Airport Deplaned (Base: Flew)	2017	2018	
Jacksonville International	80.2%	79.5%	↓
Orlando International/Sanford	11.7	13.2	↑

Purpose of Trip (Multiple Response)	2017	2018	
Vacation	62.1%	65.3%	↑
A Getaway	24.9	20.4	↓
Business/Conference/Meeting	15.1	13.1	↓
Special Event/Festival	7.4	6.8	↓
Visit with Friends/Relatives	7.2	6.4	↓
Wedding/Honeymoon	5.7	4.3	↓

First Visit to (% yes)	2017	2018	
Amelia Island	43.5%	46.4%	↑
Florida	4.5	3.5	↓

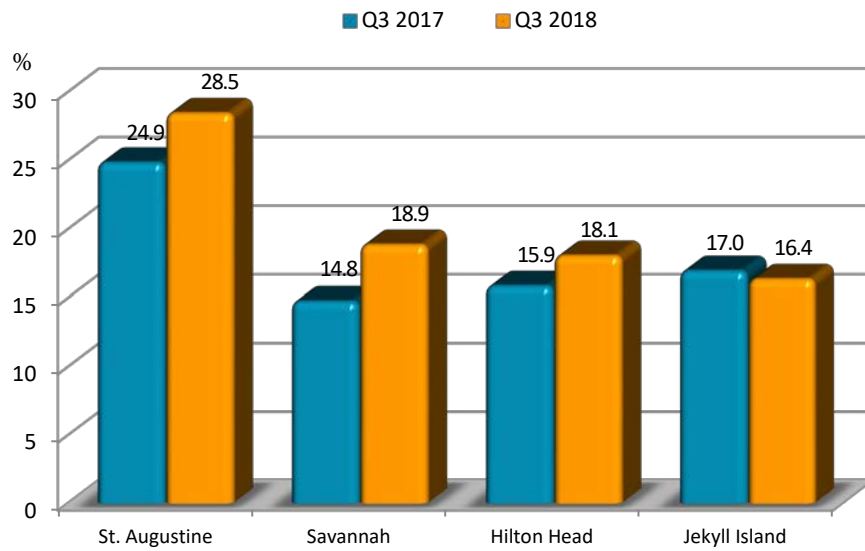
First Visit to Amelia Island (% Yes)



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

	2017	2018	
Considered Only Amelia Island	41.2%	45.4%	↑
St. Augustine/Ponte Vedra	24.9	28.5	↑
Savannah	14.8	18.9	↑
Hilton Head	15.9	18.1	↑
Jekyll Island	17.0	16.4	↓
Jacksonville Area	13.6	15.3	↑
Orlando	13.1	11.8	↓
Myrtle Beach	4.8	6.4	↑

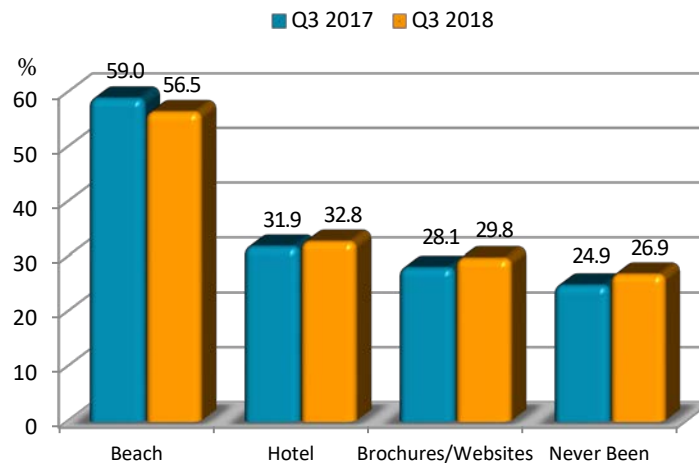
Other Areas Considered (Top Four)



Why Chose Amelia Island
(Multiple Response)

	2017	2018	
Beach	59.0%	56.5%	↓
Hotel/Accommodations	31.9	32.8	↑
Appealing Brochures/Websites	28.1	29.8	↑
Never Been/Try Something New	24.9	26.9	↑
Nature/Environment	19.1	23.3	↑
Family Oriented Area	24.2	22.5	↓
Convenient Location	19.1	22.1	↑
Weather	23.6	21.2	↓
Love/Like the Area	23.3	18.8	↓
Recommendation	17.4	18.3	↑
History	20.8	17.6	↓
Attractions	14.6	17.6	↑
Previous Experience	21.2	16.7	↓
Business/Meeting	11.4	10.7	↓
Event	7.4	8.2	↑
Visiting with Friends/Family	7.5	6.5	↓

Why Choose Amelia Island (Top Four)



Travel Planning Window	2017	2018	
How Far in Advance Start Planning Trip	44.6 days	43.3 days	↓
How Far in Advance Book Reservations	36.0 days	36.7 days	↑

Information Most Helpful to Visit <i>(Multiple Response)</i>	2017	2018	
Internet	77.3%	76.7%	↓
Recommendation	29.8	31.9	↑
Hotel/Accommodations	32.5	29.3	↓
Previous Visit	26.9	22.4	↓
Maps	20.2	18.7	↓
Print Media	10.0	8.7	↓
Family	10.8	7.9	↓
Special Event	8.1	7.1	↓
Business/Conference/Meeting	6.7	5.9	↓

Satisfaction with Amelia Island	2017	2018	
Very Satisfied	84.7%	88.4%	↑
Satisfied	14.1	10.5	↓
Satisfaction Level <i>(Combined)</i>	98.8%	98.9%	↑

Recommend Amelia Island to Friends/Relatives	2017	2018	
% Yes	96.9%	96.3%	↓

Plan to Return (% Yes)	2017	2018	
To Local Area	91.6%	92.3%	↑

Demographics	2017	2018	
Average Age Head of Household (years)	48.2	49.4	↑
Median Annual Household Income	\$141,460	\$140,261	↓
% Household Income of \$100,000+	74.3%	73.8%	↓

Seen/Read/Heard Amelia Island Information	2017	2018	
% Yes	48.3%	46.5%	↓

Influenced by Amelia Island Information	2017	2018	
<i>(Base: Respondents Reporting Seen/Heard/Read)</i>	46.8%	48.2%	↑

Avg. Party Budget Breakdown	2017	2018	
Accommodations	\$959	\$1,044	↑
Restaurant Food/Beverage	518	500	↓
Grocery Store	97	92	↓
Admissions to Attractions	85	90	↑
Other Entertainment	141	126	↓
Retail Purchases	264	258	↓
Miscellaneous	208	189	↓

Amelia Island Base Budget	2017	2018	
Total	\$2,272	\$2,299	↑
Per Person/Stay	710	742	↑
Per Person/Day	169	172	↑

Used Internet to Get Travel Information for this Trip	2017	2018	
Yes	91.7%	90.9%	↓

Booked Travel for this Trip on the Internet	2017	2018	
Yes	73.0%	75.5%	↑

Activities Enjoyed (Multiple Response)	2017	2018	
Dining Out	83.6%	82.9%	↓
Beach	85.9	82.4	↓
Relaxing	70.1	73.2	↑
Walking on the Beach	65.8	66.0	↑
Historic Downtown	62.5	63.8	↑
Shopping	61.0	58.8	↓
Sight Seeing	41.6	40.6	↓
Pool	41.2	39.6	↓
Shelling	38.2	37.6	↓
Reading	34.8	36.3	↑
State Parks	28.5	30.2	↑
Swimming	25.7	26.3	↑
Bars/Nightlife	17.2	21.2	↑
Wildlife/Environment	22.2	20.0	↓
Art Galleries	14.7	18.8	↑
Antiquing	19.2	17.6	↓
Exercising	16.4	12.9	↓
Water Cruise	9.6	10.7	↑
Farmers Market	11.0	9.4	↓
Visiting with Friends/Relatives	11.9	9.1	↓
Fishing	5.6	7.1	↑
Bird Watching	7.9	6.0	↓
Golfing	7.3	5.0	↓

Attributes that Describe Amelia Island Well	2017	2018	
Safe Destination	88.3%	89.7%	↑
Clean Environment	84.2	86.9	↑
Beautiful Beaches	87.1	84.4	↓
Good Food and Restaurants	76.4	76.9	↑
Family Friendly	74.1	70.4	↓
Complete Relaxation	72.6	68.4	↓
Upscale Accommodations	71.6	67.2	↓
Historic Downtown	67.2	64.7	↓
A Romantic Place	58.5	62.7	↑
Good Value for the Money	60.1	56.3	↓
Activities for All Ages	50.0	53.2	↑
State Parks	34.9	36.4	↑
Art Galleries	16.8	16.5	↓
Good Water Sports	8.1	9.4	↑
Good Golfing	10.8	8.2	↓
Good Fishing	8.7	7.5	↓

Attributes that Describe Amelia Island Well (Top Five)

