

RESEARCH DATA SERVICES, INC.

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

Amelia Island Fourth Quarter 2018 (Oct. – Dec.) Visitor Profile



Prepared for:

Amelia Island Tourist Development Council

Prepared by:

Research Data Services, Inc.

Research@ResearchDataLLC.com

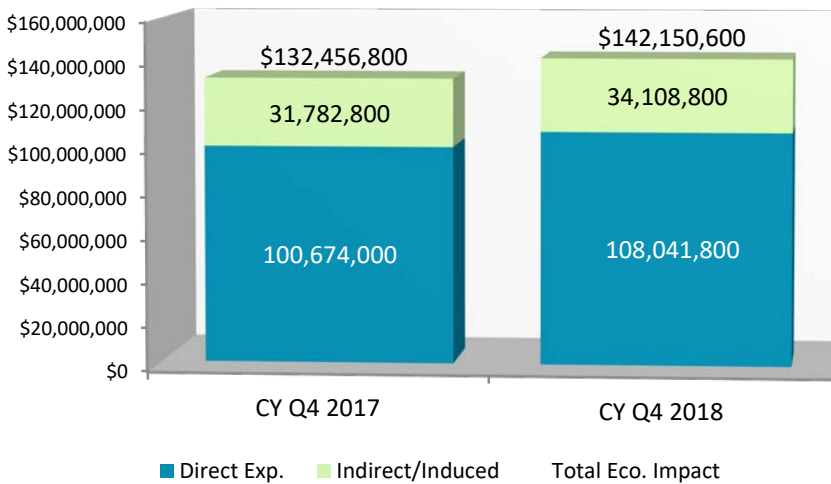
February 2019



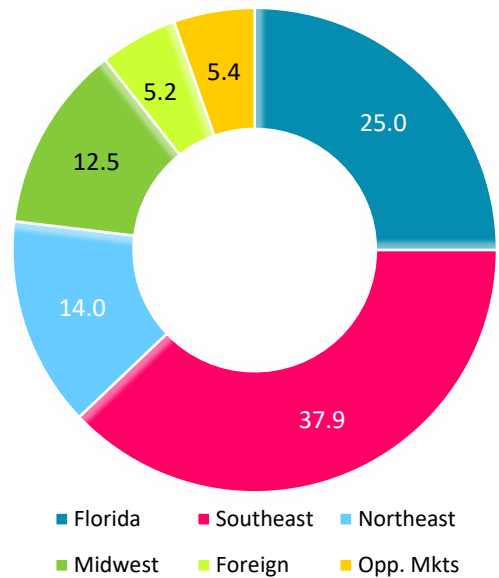
H/M/C/C* Visitor Stats	Calendar Year (Jan. - Dec.)			CY Fourth Quarter (Oct. - Dec.)		
	CY 2017	CY 2018	% Δ '17/'18	2017	2018	% Δ '17/'18
Visitors (#)	666,300	690,100	+3.6	141,000	146,200	+3.7
Direct Exp. (\$)	\$485,030,700	\$515,443,100	+6.3	\$100,674,000	\$108,041,800	+7.3
Total Eco. Impact (\$)	\$638,154,900	\$678,168,500	<i>(k: 1.3157)</i>	\$132,456,800	\$142,150,600	<i>(k: 1.3157)</i>
Taxable Ldg. Collections	\$138,370,672	\$149,522,516	+8.1	\$24,564,121	\$27,744,802	+12.9

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

CY Q4 Economic Impact



CY Q4 2018 Visitor Origin Distribution (%)



Calendar Year (Jan. - Dec.)

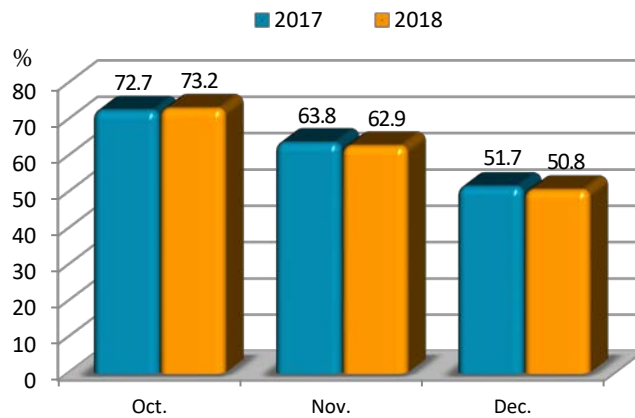
CY Fourth Quarter (Oct. - Dec.)

Visitor Origins	Calendar Year (Jan. - Dec.)			CY Fourth Quarter (Oct. - Dec.)		
	CY 2017	CY 2018	% Δ '17/'18	2017 # of Visitors	2018 # of Visitors	% Δ '17/'18
Florida	148,311	148,672	+0.2	36,378	36,550	+0.5
Southeast	261,941	273,872	+4.6	52,734	55,410	+5.1
Northeast	104,024	106,888	+2.8	21,009	20,468	-2.6
Midwest	88,408	93,457	+5.7	16,920	18,275	+8.0
Foreign	36,834	35,957	-2.4	6,909	7,602	+10.0
Opportunity Mkts	26,782	31,254	+16.7	7,050	7,895	+12.0
Total	666,300	690,100	+3.6	141,000	146,200	+3.7

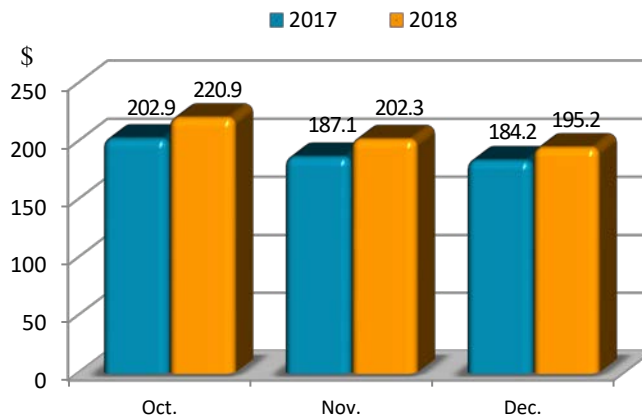
Occupancy and ADR (STR)**	October	November	December
Occupancy 2018	73.2%	62.9%	50.8%
Occupancy 2017 †	72.7	63.8	51.7
Δ % Occ. ('17/'18)	+0.6%	-1.5%	-1.7%
ADR 2018	\$220.85	\$202.29	\$195.15
ADR 2017 †	202.85	187.07	184.16
Δ % ADR ('17/'18)	+8.9%	+8.1%	+6.0%
RevPAR 2018	\$161.56	\$127.22	\$99.13
RevPAR 2017 †	147.56	119.38	95.16
Δ % RevPAR ('17/'18)	+9.5%	+6.6%	+4.2%

** Source: Smith Travel Research; † 2017 Update

Occupancy (STR)



Room Rates (STR)



Fourth Quarter 2018 Top U.S. Feeder Markets

States of Origin: <i>Primary Markets</i>		2017	2018
1.	Florida	25.8%	25.0%
2.	Georgia	17.0	17.9
3.	New York/New Jersey	6.8	6.1
4.	North Carolina	5.8	6.0
5.	South Carolina	5.1	4.7

States of Origin: <i>Secondary Markets</i>		2017	2018
6.	Pennsylvania	3.3%	3.9%
7.	Ohio	3.2	3.4
8.	Tennessee	3.7	3.2
9.	Virginia	2.6	2.5
10.	Massachusetts	--	2.0

Fourth Quarter 2018 Top U.S. Feeder Markets

DMA's: Primary Markets		2017	2018
1.	Atlanta	10.6%	11.5%
2.	Greater Orlando Area	8.0	8.4
3.	Jacksonville	7.3	7.6
4.	New York/New Jersey	5.9	5.0
5.	Tampa/St. Petersburg	4.6	4.9

DMA's: Secondary Markets		2017	2018
6.	Savannah	2.9%	3.4%
7.	Washington, D.C.	3.0	2.8
8.	West Palm Beach	2.6	2.5
9.	Nashville	--	2.3
10.	Chicago	--	2.2

Visitor Profile Metrics:

	2017 <i>n = 529</i>	2018 <i>n = 611</i>	
Length of Stay (Days)			
In Amelia Island	3.9 days	4.0 days	↑

	2017	2018	
Party Size			
Number of People	2.7 people	2.7 people	—

Travel Party Composition <i>(Multiple Response)</i>	2017	2018	
Couple	57.3%	56.1%	↓
Family	23.4	25.0	↑
Group of Friends	10.5	8.9	↓
Extended Family	8.7	7.6	↓
Single	5.3	6.1	↑

Have Children or Young Adults In Immediate Travel Party	2017	2018	
% Yes	19.6%	18.1%	↓

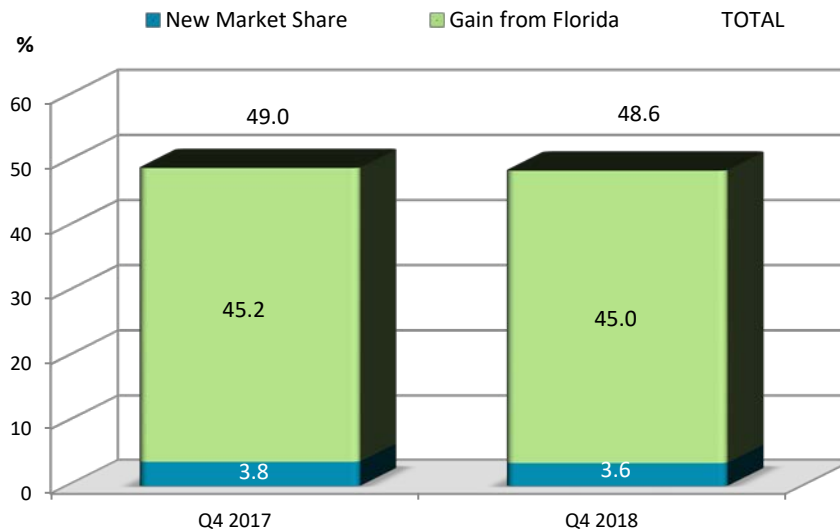
Transportation Mode <i>(Multiple Response)</i> <i>(Percentaged to the Base of All Respondents)</i>	2017	2018	
Personal Car/RV	68.3%	67.5%	↓
Plane	30.8	31.3	↑
Rental Car	28.1	30.3	↑

Airport Deplaned <i>(Base: Flew)</i>	2017	2018	
Jacksonville International	82.4%	84.1%	↑
Orlando International/Sanford	11.2	7.7	↓

Purpose of Trip (Multiple Response)	2017	2018	
Vacation	40.8%	42.8%	↑
A Getaway	33.6	29.1	↓
Visit with Friends/Relatives	14.4	13.1	↓
Special Event/Festival	10.4	12.8	↑
Business/Conference/Meeting	14.7	12.6	↓
Wedding/Honeymoon	6.4	5.8	↓

First Visit to (% yes)	2017	2018	
Amelia Island	49.0%	48.6%	↓
Florida	3.8	3.6	↓

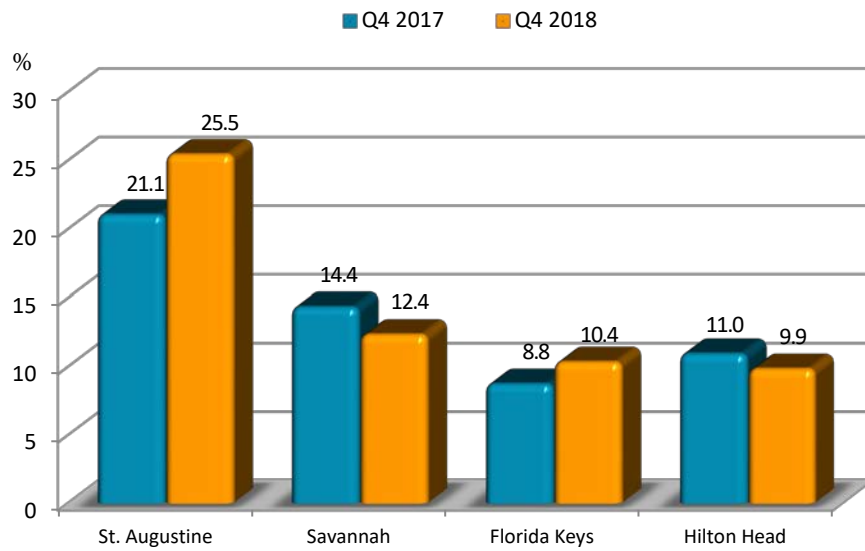
First Visit to Amelia Island (% Yes)



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

	2017	2018	
Considered Only Amelia Island	52.6%	55.4%	↑
St. Augustine/Ponte Vedra	21.1	25.5	↑
Savannah	14.4	12.4	↓
Florida Keys	8.8	10.4	↑
Hilton Head	11.0	9.9	↓
Jacksonville Area	10.4	9.7	↓
Jekyll Island	10.7	8.6	↓
Orlando	7.9	5.5	↓

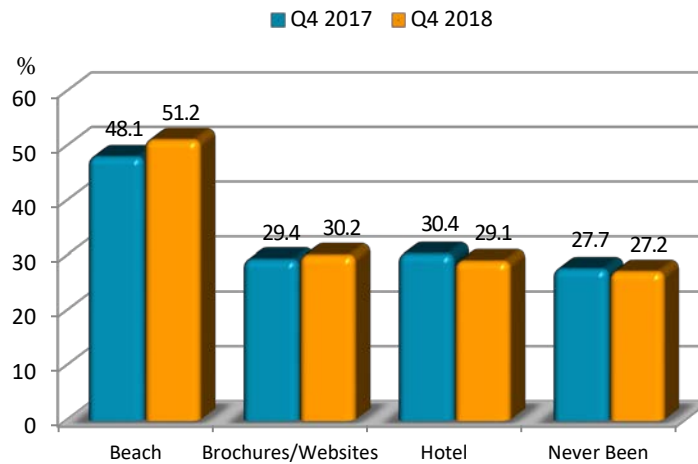
Other Areas Considered (Top Four)



Why Chose Amelia Island
(Multiple Response)

	2017	2018	
Beach	48.1%	51.2%	↑
Appealing Brochures/Websites	29.4	30.2	↑
Hotel/Accommodations	30.4	29.1	↓
Never Been/Try Something New	27.7	27.2	↓
Love/Like the Area	23.3	26.4	↑
Recommendation	21.4	24.3	↑
Nature/Environment	19.5	22.7	↑
Previous Experience	20.9	21.6	↑
Weather	22.2	20.3	↓
Convenient Location	14.7	16.4	↑
History	14.4	16.0	↑
Event	12.0	14.9	↑
Attractions	9.0	11.9	↑
Visiting with Friends/Family	15.4	11.2	↓
Family Oriented Area	10.5	10.8	↑
Business/Meeting	13.4	10.3	↓
Culture	8.7	9.5	↑

Why Choose Amelia Island (Top Four)



Travel Planning Window	2017	2018	
How Far in Advance Start Planning Trip	43.3 days	41.9 days	↓
How Far in Advance Book Reservations	33.5 days	34.0 days	↑

Information Most Helpful to Visit (Multiple Response)	2017	2018	
Internet	74.8%	79.4%	↑
Previous Visit	32.9	36.7	↑
Hotel/Accommodations	28.2	31.1	↑
Recommendation	23.7	26.0	↑
Print Media	14.4	13.1	↓
Business/Conference/Meeting	16.1	11.5	↓
Maps	11.2	10.3	↓
Family	11.7	9.7	↓
Special Event	7.4	8.3	↑

Satisfaction with Amelia Island	2017	2018	
Very Satisfied	89.0%	89.6%	↑
Satisfied	6.9	7.2	↑
Satisfaction Level (Combined)	95.9%	96.8%	↑

Recommend Amelia Island to Friends/Relatives	2017	2018	
% Yes	97.4%	96.6%	↓

Plan to Return (% Yes)	2017	2018	
To Local Area	90.7%	89.6%	↓

Demographics	2017	2018	
Average Age Head of Household (years)	51.8	51.5	↓
Median Annual Household Income	\$132,762	\$135,920	↑
% Household Income of \$100,000+	74.8%	76.7%	↑

Seen/Read/Heard Amelia Island Information	2017	2018	
% Yes	52.5%	53.2%	↑

Influenced by Amelia Island Information	2017	2018	
<i>(Base: Respondents Reporting Seen/Heard/Read)</i>	52.7%	54.4%	↑

Avg. Party Budget Breakdown	2017	2018	
Accommodations	\$777	\$835	↑
Restaurant Food/Beverage	475	461	↓
Grocery Store	65	60	↓
Admissions to Attractions	83	89	↑
Other Entertainment	137	149	↑
Retail Purchases	208	220	↑
Miscellaneous	184	182	↓

Amelia Island Base Budget	2017	2018	
Total	\$1,929	\$1,996	↑
Per Person/Stay	714	739	↑
Per Person/Day	183	185	↑

Used Internet to Get Travel Information for this Trip	2017	2018	
Yes	91.6%	89.2%	↓

Booked Travel for this Trip on the Internet	2017	2018	
Yes	67.5%	71.6%	↑

Activities Enjoyed (Multiple Response)	2017	2018	
Dining Out	81.9%	84.8%	↑
Historic Downtown	79.7	80.3	↑
Beach	72.5	75.5	↑
Relaxing	61.1	64.8	↑
Walking on the Beach	58.8	62.8	↑
Shopping	56.2	55.8	↓
Shelling	28.1	32.7	↑
Sight Seeing	34.8	32.0	↓
State Parks	27.3	30.0	↑
Reading	28.6	29.3	↑
Wildlife/Environment	22.5	24.3	↑
Bars/Nightlife	19.7	20.9	↑
Pool	23.5	20.4	↓
Art Galleries	17.0	18.3	↑
Swimming	17.6	17.0	↓
Antiquing	16.7	16.9	↑
Bird Watching	11.6	14.3	↑
Water Cruise	13.1	13.6	↑
Exercising	11.4	12.9	↑
Visiting with Friends/Relatives	14.4	12.2	↓
Farmers Market	11.1	9.8	↓
Golfing	8.2	8.0	↓
Fishing	6.6	7.5	↑

Attributes that Describe Amelia Island Well	2017	2018	
Clean Environment	82.6%	84.4%	↑
Safe Destination	78.8	80.7	↑
Good Food and Restaurants	76.7	80.4	↑
Beautiful Beaches	77.0	75.0	↓
Historic Downtown	71.8	72.3	↑
A Romantic Place	63.0	63.8	↑
Complete Relaxation	63.8	61.5	↓
Family Friendly	56.5	59.3	↑
Upscale Accommodations	56.1	57.7	↑
Good Value for the Money	44.4	46.4	↑
State Parks	34.7	37.2	↑
Activities for All Ages	21.1	21.6	↑
Art Galleries	13.0	14.0	↑
Good Golfing	11.8	12.5	↑
Good Fishing	8.3	11.4	↑
Good Water Sports	7.8	8.1	↑

Attributes that Describe Amelia Island Well (Top Five)

