

RESEARCH DATA SERVICES, INC.

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



Amelia Island
Calendar Year 2016 Visitor Profile
(January – December)

Prepared for:

Amelia Island Tourist Development Council

Prepared by:

Research Data Services, Inc.

www.ResearchDataLLC.com

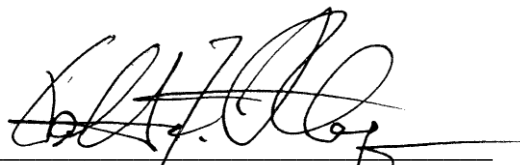
March 2017

Amelia Island: Calendar Year 2016 Visitor Profile

Certification

RESEARCH DATA SERVICES, INC. hereby certifies that, except as otherwise noted in this report:

1. We have no present or contemplated future interest in the project that is the subject of this study.
2. We have no personal interest or bias with respect to the subject matter of this report or the parties involved.
3. To the best of our knowledge and belief, the statements of fact contained in this report, upon which analyses, opinions, and conclusions expressed herein are based, are true and correct.
4. This report sets forth all of the limiting conditions (imposed by the terms of our assignment or by the undersigned) affecting the analyses, opinions, and conclusions contained in this report.
5. The underlying assumptions are based on present circumstances and information currently available.
6. Because circumstances may change and unanticipated events may occur subsequent to the date of this report, the reader must evaluate the assumptions and rationale of this report in light of the circumstances then prevailing. The terms of this engagement are such that we have no obligation to revise this report or the included projections to reflect events or conditions which occur subsequent to the completion of our fieldwork.



Walter J. Klages, Ph.D., President

March 2, 2017

Date

Amelia Island: Calendar Year 2016 Visitor Profile

Estimated Visitor Metrics

Visitor Statistics	<i>Quarter 1 (Jan. - Mar. '16)</i>	<i>Quarter 2 (Apr. - Jun. '16)</i>	<i>Quarter 3 (Jul. - Sep. '16)</i>	<i>Quarter 4 (Oct. - Dec. '16)</i>	Calendar Year 2015	Calendar Year 2016	% Δ 2015-2016
H/M/C/C Visitors (#)	157,300	165,800	183,800	126,800	618,200	633,700	+2.5%
Direct Expenditures (\$)	\$114,168,300	\$125,013,200	\$126,638,200	\$89,221,600	\$433,142,700	\$455,041,300	+5.1%
Total Economic Impact	\$150,211,200	\$164,479,900	\$166,617,900	\$117,388,800	\$569,885,800	\$598,697,800	+5.1%

Estimated Visitor Origins: Number of Visitors by Region

H/M/C/C Visitor Origins	<i>Quarter 1 (Jan. - Mar. '16)</i>	<i>Quarter 2 (Apr. - Jun. '16)</i>	<i>Quarter 3 (Jul. - Sep. '16)</i>	<i>Quarter 4 (Oct. - Dec. '16)</i>	Calendar Year 2015	Calendar Year 2016	% Δ 2015-2016
Florida	24,696	38,300	41,539	31,954	131,974	136,489	+3.4%
Southeast	51,122	70,631	90,246	46,662	252,174	258,661	+2.6%
Northeast	34,921	24,538	19,667	18,132	92,050	97,258	+5.7%
Midwest	30,044	18,570	18,747	16,357	85,553	83,718	-2.1%
Foreign	11,326	6,300	8,087	7,101	29,602	32,814	+10.9%
Markets of Opp.	5,191	7,461	5,514	6,594	26,847	24,760	-7.8%
Total	157,300	165,800	183,800	126,800	618,200	633,700	+2.5%

Amelia Island: Calendar Year 2016 Visitor Profile

Occupancy and ADR Data

	Quarter 1			Quarter 2			Quarter 3			Quarter 4			Calendar Year 2016	% Δ '15-'16
	Jan. '16	Feb. '16	Mar. '16	Apr. '16	May '16	Jun. '16	Jul. '16	Aug. '16	Sep. '16	Oct. '16	Nov. '16	Dec. '16		
Occ. (%)	58.1	70.5	81.9	78.8	74.8	82.0	87.8	73.5	73.0	55.9	64.2	51.5	71.0	-0.3%
ADR	\$168.21	\$184.00	\$273.01	\$258.42	\$238.68	\$244.86	\$243.72	\$196.53	\$204.78	\$203.37	\$188.30	\$183.91	\$219.84	+2.8%
RevPAR	\$97.78	\$129.73	\$223.61	\$203.58	\$178.56	\$200.72	\$214.09	\$144.50	\$149.43	\$113.71	\$120.85	\$94.66	\$156.02	+2.6%

Amelia Island: Calendar Year 2016 Visitor Profile

Visitor Profile

	Quarter 1 <i>Jan. - Mar. '16</i>	Quarter 2 <i>Apr. - Jun. '16</i>	Quarter 3 <i>Jul. - Sep. '16</i>	Quarter 4 <i>Oct. - Dec. '16</i>	Calendar Year 2016
Length of Stay (Days)					
In Amelia Island	4.0	4.5	4.2	4.0	4.2
Party Size					
Number of People	2.7	2.9	3.0	2.5	2.8
Party Composition (Multiple Response)					
Family	23.7	37.5	36.0	20.5	29.4
Couple	62.8	45.9	47.3	59.2	53.8
Single	6.0	4.9	5.3	7.6	6.0
Extended Family	11.5	13.9	8.8	7.9	10.5
Group of Friends	7.0	6.7	6.9	7.4	7.0
Have Children or Young Adults in Immediate Travel Party					
% Yes	19.5	32.1	31.0	15.0	24.4
Transportation <i>(Percentaged to the Base of All Resp.)</i>					
Personal Car/RV	77.0	70.1	75.6	65.6	72.1
Plane	21.8	26.9	22.0	32.2	25.7
Rental Car	17.9	19.7	18.8	29.4	21.5
Airport Deplaned (Base: Flew)					
Jacksonville Int'l	83.8	81.6	82.1	84.4	83.0
Orlando Int'l/Sanford	7.1	11.5	9.8	10.2	9.7
Purpose of Trip (Multiple Response)					
Vacation	58.8	68.0	61.7	46.7	58.8
A Getaway	28.0	21.0	26.0	30.6	26.4
Business/Meeting/Conference	10.0	10.7	14.6	14.4	12.4
Friends/Relatives	11.5	10.3	5.8	10.2	9.5
Wedding/Honeymoon	6.4	6.9	6.0	6.7	6.5
Special Event/Festival	5.7	9.5	7.5	10.9	8.4

Amelia Island: Calendar Year 2016 Visitor Profile

	Quarter 1 <i>Jan. - Mar. '16</i>	Quarter 2 <i>Apr. - Jun. '16</i>	Quarter 3 <i>Jul. - Sep. '16</i>	Quarter 4 <i>Oct. - Dec. '16</i>	Calendar Year 2016
First Visit to (% yes)					
Amelia Island	65.8	53.2	49.7	51.4	55.0
Florida	8.3	6.9	6.2	5.2	6.7
Other Areas in FL Considered for Trip <i>(Open Ended Multiple Response)</i>					
None, Only Amelia Island	44.1	45.5	48.6	54.2	48.1
St. Augustine/Ponte Vedra	14.8	17.9	23.7	23.3	19.9
Savannah	15.1	12.9	16.1	10.1	13.6
Orlando	10.2	9.8	11.6	5.9	9.4
Hilton Head	8.0	9.5	12.7	9.6	10.0
Jacksonville	11.9	8.7	12.4	8.0	10.3
Jekyll Island	10.3	12.0	13.3	7.0	10.7
Why Chose Amelia Island <i>(Multiple Response)</i>					
Beach	41.9	56.5	52.3	51.2	50.5
Previous Experience	10.6	14.3	17.5	17.0	14.9
Love/Like the Area	19.9	22.1	17.2	19.1	19.6
Never Been/Try Something New	30.1	30.5	28.3	29.8	29.7
Hotel/Accommodations	16.4	30.0	28.9	28.8	26.0
Recommendation	25.6	31.5	18.2	25.0	25.1
Convenient Location	21.0	19.7	15.2	11.9	17.0
Appealing Brochures/Websites	29.7	23.6	27.1	28.6	27.3
Nature/Environment	19.4	21.5	21.3	23.7	21.5
Family Oriented Area	9.0	20.5	23.4	9.8	15.7
Business/Meeting	11.9	9.6	10.1	12.8	11.1
Visiting with Friends/Family	9.6	10.7	6.6	13.1	10.0
History	18.7	17.5	19.0	12.3	16.9
Weather	17.1	18.5	11.7	19.4	16.7
Event	n/a	10.3	7.2	10.4	9.3
Attractions	16.2	16.6	10.9	9.9	13.4
Travel Planning Window <i>(Days)</i>					
How Far in Advance Start Planning Trip	45.3	54.2	46.5	43.7	47.4
How Far in Advance Book Reservations	32.3	35.2	33.8	31.6	33.2

Amelia Island: Calendar Year 2016 Visitor Profile

	Quarter 1 Jan. - Mar. '16	Quarter 2 Apr. - Jun. '16	Quarter 3 Jul. - Sep. '16	Quarter 4 Oct. - Dec. '16	Calendar Year 2016
Information Most Helpful to Visit (Open Ended Multiple Response)					
Internet	79.8	86.6	76.9	71.1	78.6
Previous Visit	24.6	35.3	25.8	29.7	28.9
Recommendation	27.3	33.3	33.8	27.6	30.5
Family	10.3	7.6	13.5	12.3	10.9
Hotel/Accommodations	23.6	23.0	27.2	26.1	25.0
Print Media	19.7	19.5	10.9	15.8	16.5
Business/Conference/Meeting	11.4	6.0	6.5	14.8	9.7
Maps	9.8	10.3	14.1	9.9	11.0
Special Event	6.1	8.7	8.4	8.4	7.9
Satisfaction with Amelia Island					
Very Satisfied	80.9	85.0	83.1	87.9	84.2
Satisfied	14.5	10.8	15.9	9.2	12.6
Satisfaction Level (Very Satisfied + Satisfied)	95.4	95.8	99.0	97.1	96.8
Recommend Amelia Island to Friends/Relatives					
% Yes	96.3	98.3	97.1	96.4	97.0
Plan to Return (% yes)					
To Local Area	87.8	85.2	90.5	89.0	88.1
Demographics					
Average Age Head of HH (yrs)	51.1	49.0	48.6	52.1	50.2
Median Annual HH Income	\$127,224	\$126,304	\$138,024	\$129,861	\$521,413
Seen/Read/Heard Amelia Island Message					
% Yes	42.2	38.1	44.7	49.4	43.6
Influenced by Amelia Island Message (Base: Seen/Read/Heard Area Message)					
% Yes	50.9	58.0	47.9	55.7	53.1

Amelia Island: Calendar Year 2016 Visitor Profile

	Quarter 1 <i>Jan. - Mar. '16</i>	Quarter 2 <i>Apr. - Jun. '16</i>	Quarter 3 <i>Jul. - Sep. '16</i>	Quarter 4 <i>Oct. - Dec. '16</i>	Calendar Year 2016
Avg. Party Budget Breakdown					
Accommodations	\$768	\$1,009	\$927	\$778	\$871
Restaurant Food/Beverage	\$458	\$456	\$466	\$422	\$450
Grocery Store	\$70	\$70	\$88	\$44	\$68
Admissions to Attractions	\$85	\$65	\$62	\$68	\$70
Other Entertainment	\$87	\$84	\$125	\$113	\$102
Retail Purchases	\$203	\$243	\$237	\$170	\$213
Miscellaneous	\$289	\$261	\$162	\$164	\$219
Average Party Budget Breakdown					
Total	\$1,960	\$2,188	\$2,067	\$1,759	\$1,993
Per Person/Trip	\$726	\$754	\$689	\$704	\$718
Per Person/Day	\$181	\$168	\$164	\$176	\$172
Use Internet to Obtain Travel Information					
% Yes	93.7	93.2	92.7	93.8	93.4
Book Travel Reservations For Trip Online					
<i>(Base: Resp. who Obtain Travel Info. Online)</i>					
% Yes	70.1	68.7	68.9	66.1	68.5

Amelia Island: Calendar Year 2016 Visitor Profile

	Quarter 1 <i>Jan. - Mar. '16</i>	Quarter 2 <i>Apr. - Jun. '16</i>	Quarter 3 <i>Jul. - Sep. '16</i>	Quarter 4 <i>Oct. - Dec. '16</i>	Calendar Year 2016
Activities Enjoyed in Area					
<i>(Open Ended Multiple Response)</i>					
Beach	68.7	86.1	82.1	75.4	78.1
Dining Out	85.3	80.4	79.2	76.6	80.4
Historic Downtown	78.9	85.7	63.0	75.9	75.9
Walking on the Beach	61.8	65.2	66.9	59.4	63.3
Relaxing	61.4	66.5	71.9	63.0	65.7
Shopping	59.3	59.5	63.1	59.8	60.4
Sight-Seeing	37.9	45.6	39.7	37.8	40.3
Pool	20.7	38.8	39.4	19.6	29.6
Shelling	29.7	33.3	36.9	25.9	31.5
Reading	29.9	31.5	31.8	30.6	31.0
Swimming	14.6	38.3	25.5	15.2	23.4
State Parks	39.4	35.8	30.9	25.4	32.9
Wildlife/Environment	25.2	26.1	24.0	23.8	24.8
Visiting with Friends/Relatives	14.4	9.2	11.0	14.1	12.2
Bars/Nightlife	16.0	15.7	19.0	16.8	16.9
Art Galleries	16.6	14.1	14.2	17.6	15.6
Antiquing	18.1	20.9	18.2	17.3	18.6
Exercising	13.8	16.3	15.0	13.4	14.6
Golfing	9.0	8.2	9.9	6.6	8.4
Water Cruise	12.8	15.4	10.4	14.2	13.2
Fishing	6.0	5.8	7.7	6.4	6.5
Farmers Market	11.0	11.1	10.8	9.7	10.7

Amelia Island: Calendar Year 2016 Visitor Profile

	Quarter 1 <i>Jan. - Mar. '16</i>	Quarter 2 <i>Apr. - Jun. '16</i>	Quarter 3 <i>Jul. - Sep. '16</i>	Quarter 4 <i>Oct. - Dec. '16</i>	Calendar Year 2016
Amelia Island Attributes					
Clean Environment	74.0	74.5	85.8	85.8	80.0
Beautiful Beaches	75.2	80.1	83.7	74.8	78.5
Safe Destination	76.3	69.2	84.9	82.8	78.3
Family Friendly	58.1	66.3	78.8	52.9	64.0
Complete Relaxation	53.7	62.2	72.1	63.1	62.8
Good Food & Restaurants	74.8	70.3	75.4	78.8	74.8
Historic Downtown	76.0	71.5	68.7	74.1	72.6
Upscale Accommodations	59.8	49.8	67.8	55.8	58.3
Good Value for the Money	41.9	44.5	55.1	47.6	47.3
A Romantic Place	54.7	47.9	57.1	64.4	56.0
Activities for All Ages	19.4	25.4	49.4	19.7	28.5
State Parks	39.3	31.9	37.5	38.8	36.9
Good Golfing	11.9	10.1	14.8	11.7	12.1
Good Water Sports	8.3	13.7	9.2	9.9	10.3
Good Fishing	10.5	7.2	10.1	9.1	9.2
Art Galleries	6.0	9.7	15.2	14.7	11.4