

Amelia Island CVB

Visitor Tracking Study
January – March 2026

METHODOLOGY



Data Collection:

From January 1, 2026, to March 31, 2026, **511** visitors were interviewed in person at events, the beach, The Shops at The Omni, and downtown, as well as online.

Note: The sampling error for a sample size of 511 is $\pm 4.3\%$ points given a 95% confidence level. That is, we are very certain (95%) that the results in our visitor tracking study are within 4.3% points of the "true" value on a quarterly basis.

KEY PERFORMANCE INDICATORS



KEY PERFORMANCE INDICATORS Q2 FY26*

A year-over-year decrease in overall visitor number - particularly higher-spending visitors staying in paid accommodations - resulted in lower total direct spending in FY26 Q2.



213,900

**Total
Visitors**

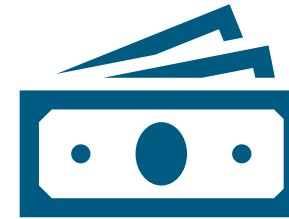
- 4.6% from FY25



199,570

**Room
Nights**

- 3.9% from FY25



\$158,705,600

**Direct
Spending**

- 6.9% from FY25



59.8%

Occupancy

- 4.3% from FY25

LODGING METRICS Q2 FY26

Note: Airbnb (effective April 30, 2026) and Vrbo (effective May 30, 2026) have updated how rates are quoted through their platforms. The ADR now includes cleaning fees, platform service fees, and applicable discounts (e.g., weekly or monthly stay discounts). Therefore, the ADR of vacation rentals may appear inflated in YOY comparisons now that Key Data is capturing the inclusive price (excluding taxes) rather than the base accommodation rate.

COMBINED



59.8%

Occupancy

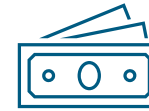
- 4.3% from FY25



\$286.55

Average Daily Rate

+ 3.7% from FY25



\$171.26

Revenue Per Available Room

- 0.7% from FY25

HOTELS*



67.1%

Occupancy

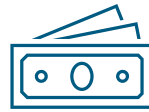
+ 1.9% from FY25



\$304.84

Average Daily Rate

+ 6.5% from FY25



\$204.56

Revenue Per Available Room

+ 8.5% from FY25

VACATION RENTALS**



48.3%

Occupancy

- 14.5% from FY25



\$258.00

Average Daily Rate

- 0.4% from FY25



\$124.61

Revenue Per Available Room

- 14.8% from FY25

VISITOR PROFILE SUMMARY



VISITOR PROFILE Q2 FY26



52

Median Age

37%

First-Time Visitor

\$148,100

Median Household Income

\$519

Average Daily Travel Party Spend

2.8

Travel Party Size

3.6

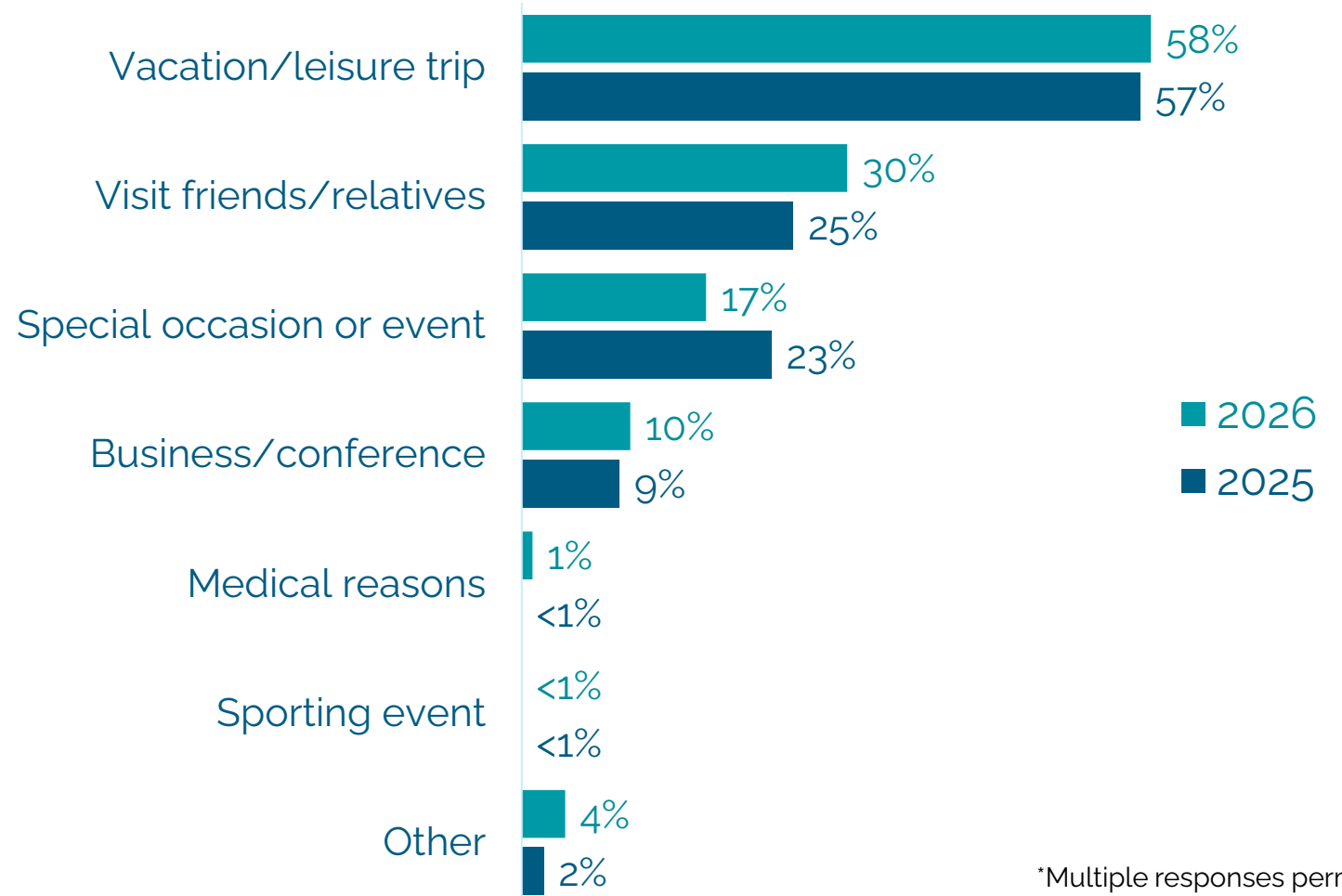
Length of Stay

MAIN REASONS FOR VISITING Q2 FY26*

What was your main reason for taking this trip to the Amelia Island area?

» **Going along with the increase in visitors staying in unpaid accommodations, more visitors came to Amelia Island mainly to visit friends or relatives compared to Q2 FY25**

» **That said, the most popular reason for visiting is still leisure (58% of visitors); beach vacations in particular (44% of visitors)**

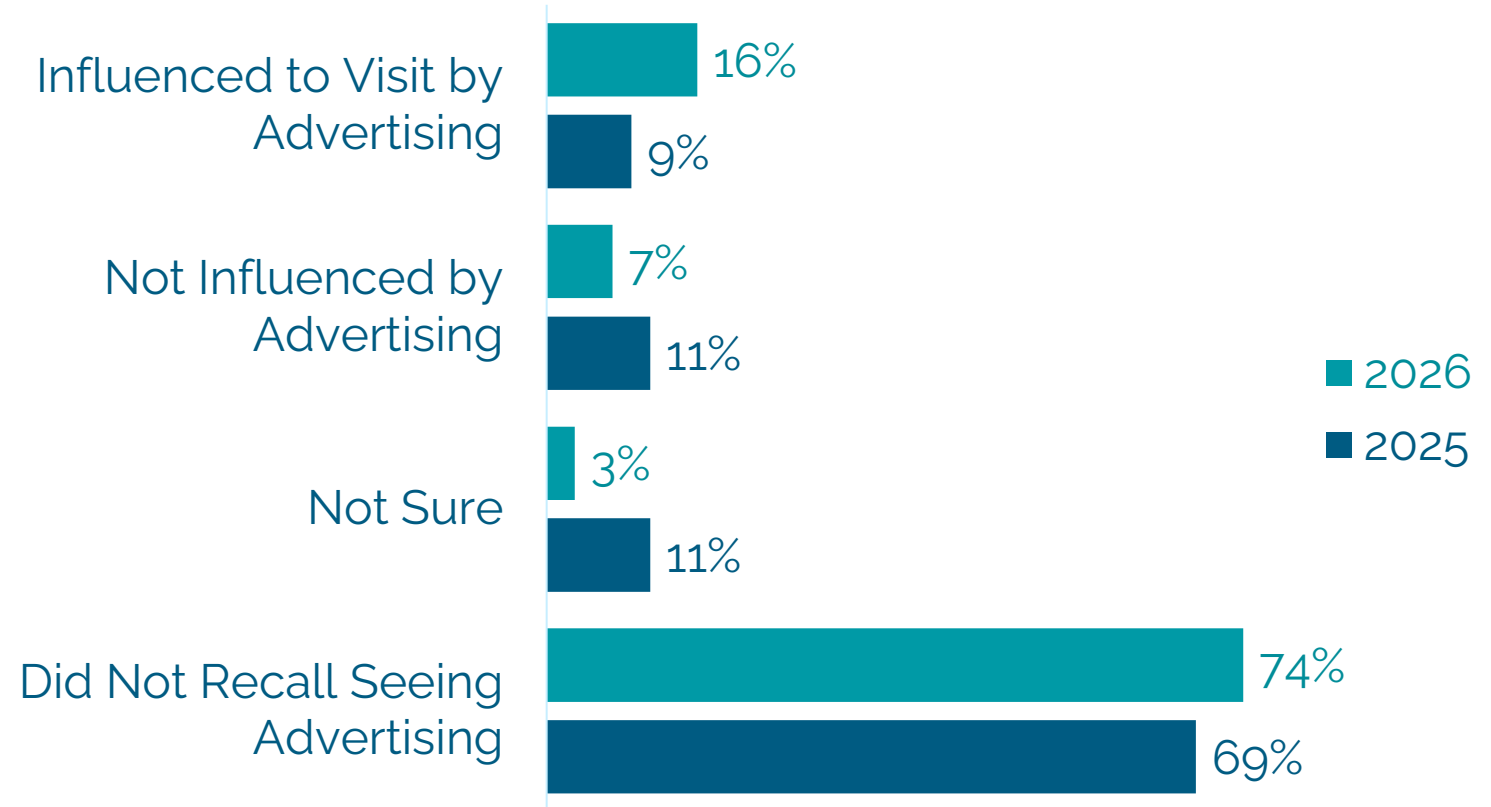


*Multiple responses permitted.

ADVERTISING INFLUENCE*

Were you influenced by advertising, promotions, or travel stories to come to the Amelia Island area?

» After trending down in Q2 over the past 2 years, the percent of visitors who were influenced by advertising to visit Amelia Island increased in Q2 FY26



ONLINE TRIP PLANNING SOURCES*

- » **Going along with this quarter's decrease in overall spending, visitors continue to rely increasingly on online travel agencies to help them plan cost-effective trips**
- » **While more visitors have been using social media to plan their trips in the past year, fewer relied on it this quarter compared to Q2 FY25**

Online Planning Source	2025	2026
Online travel agency	19%	30%
Airbnb, Vrbo, etc.	30%	28%
Review website/app	27%	27%
Hotel websites/apps	26%	23%
Amelia Island social media	27%	19%
Online travel reviews, blogs, stories	8%	14%
Personal social media	20%	11%
Mapping websites	4%	9%
Amelialand.com	6%	6%
Restaurant websites/apps	5%	6%
ChatGPT or other AI program	<1%	5%
Video streaming services	2%	2%
Airline websites/apps	2%	2%
Amelia Island mobile app	<1%	1%
Music streaming services	1%	1%
Amelia Island rental companies	1%	1%
Rental car websites/apps	1%	1%
Accessibility travel resource sites	<1%	1%
Other	4%	5%
None	18%	24%

*Multiple responses permitted.
Based on visitors traveling for leisure.

TOP ORIGIN MARKETS

Top Origin Markets – All Visitors

Market	2025	2026
Jacksonville ¹	14.4%	20.8%
Atlanta	4.1%	5.4%
New York City ²	4.3%	4.2%
Orlando-Daytona Beach-Melbourne	4.3%	4.1%
Savannah	2.0%	3.2%
Boston	3.1%	2.6%
Charlotte	3.6%	2.6%
Washington, DC-Hagerstown ³	2.4%	2.6%
Philadelphia	2.2%	2.3%
Tampa-St. Petersburg	2.2%	2.1%

Top Origin Markets – Overnight Visitors

Market	2025	2026
Jacksonville ¹	4.1%	8.0%
Atlanta	4.9%	7.0%
New York City ²	5.3%	5.1%
Orlando-Daytona Beach-Melbourne	4.4%	3.9%
Savannah	1.5%	3.0%
Charlotte	4.3%	3.0%
Washington, DC-Hagerstown ³	2.8%	3.0%
Boston	3.5%	2.8%
Tampa-St. Petersburg	2.5%	2.6%
Philadelphia	2.4%	2.5%
Miami-Fort Lauderdale	1.9%	2.3%

¹Includes Jacksonville, FL and Brunswick, GA.

²Includes parts of New York, New Jersey, and Connecticut.

³Includes parts of Maryland, Virginia, West Virginia, and Pennsylvania.

STRAIGHT FROM YOUR VISITORS: Q2 FY26*



Reasons for Choosing Amelia Island

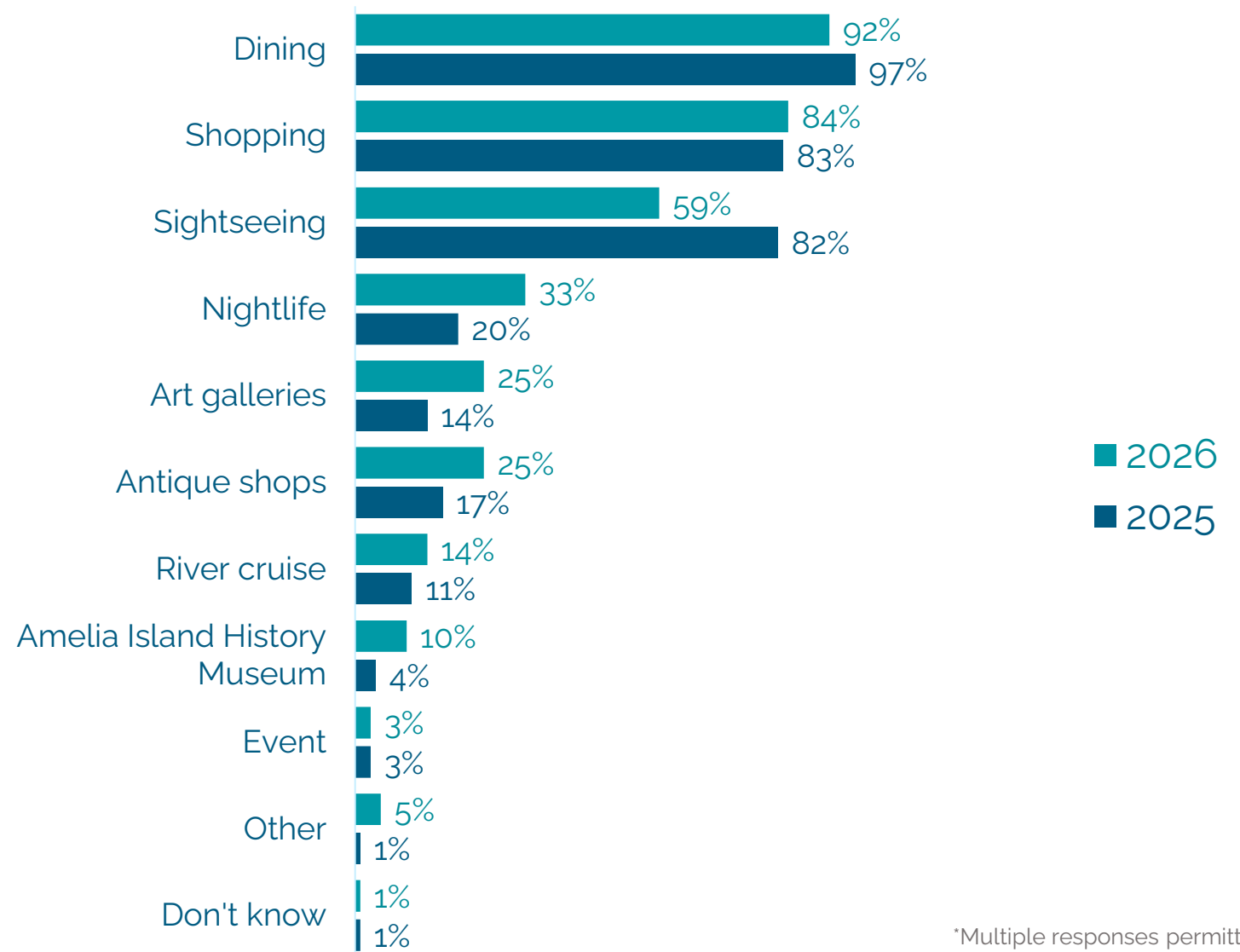
"We liked that it offered a great mix of beach, golf, restaurants, shopping, and fun."

"The history and local attractions made it feel more interesting than other beach towns."

"We chose Amelia Island because it felt more affordable, manageable, and easy to enjoy!"

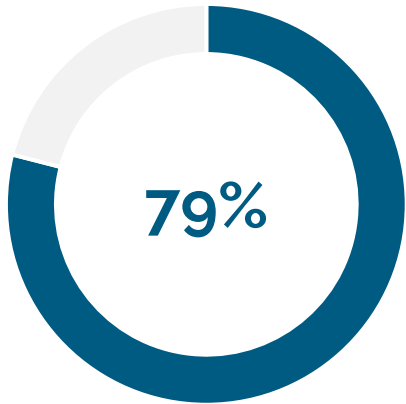
REASON FOR VISITING HISTORIC DOWNTOWN*

- » **Visitors went to downtown Amelia Island an average of 2.7 days this quarter compared to 2.8 in Q2 FY25**
- » **Their downtown visits this quarter were more purpose-driven, with fewer visitors coming just to see what downtown has to offer**



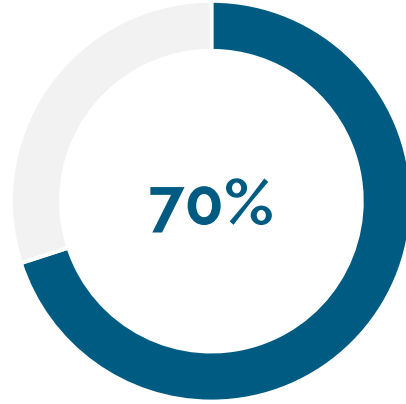
*Multiple responses permitted.

SATISFACTION STATISTICS Q2 FY26



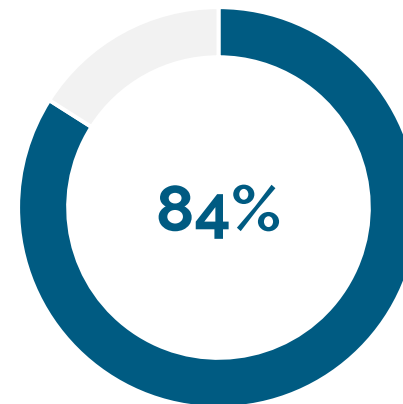
VERY SATISFIED

79% of visitors reported being very satisfied with their trip experience.



DEFINITELY RETURN

70% of visitors said they would definitely return to the area (up 8% points from 2025).



DEFINITELY RECOMMEND

84% of visitors would definitely recommend the area to friends and family over other vacation areas.



OVERALL BEACHES RATING

Visitors rated Amelia Island's beaches an average of 4.7 out of 5.

STRAIGHT FROM YOUR VISITORS: Q2 FY26*



Describing Amelia Island

“What I love most is that it works for any kind of trip - you can relax, explore, shop, dine, or just enjoy the scenery.”

“You come for the beaches, but then you realize how much history, culture, and local flavor Amelia Island has too!”

“It's a rare place that has beautiful nature, great restaurants, and a true small-town feel all in one.”

VISITOR PROFILE INSIGHTS Q2 FY26

Insights

More visitors came to Amelia Island mainly to visit friends or relatives and more visitors stayed in unpaid accommodations, including with a friend or relative.

That said, the most popular reason for visiting is still leisure (58% of visitors); beach vacations in particular (44% of visitors).

Unlike in recent quarters, more visitors YOY were influenced to visit by advertising.

Visitors continue to rely increasingly on online travel agencies to help them plan cost-effective trips.

A larger share of visitors traveled from both Jacksonville and Atlanta.

Fewer visitors relied on social media to help them plan their trips.

More visitors definitely plan to return to the Amelia Island area.

DETAILED FINDINGS



VISITOR JOURNEY: KEY PERFORMANCE INDICATORS



TOURISM SNAPSHOT: KPIs

	January – March 2025	January – March 2026	% Δ
Visitors	224,300	213,900	- 4.6%
Visitor Days	785,050	770,040	- 1.9%
Direct Spending ¹	\$170,519,700	\$158,705,600	- 6.9%

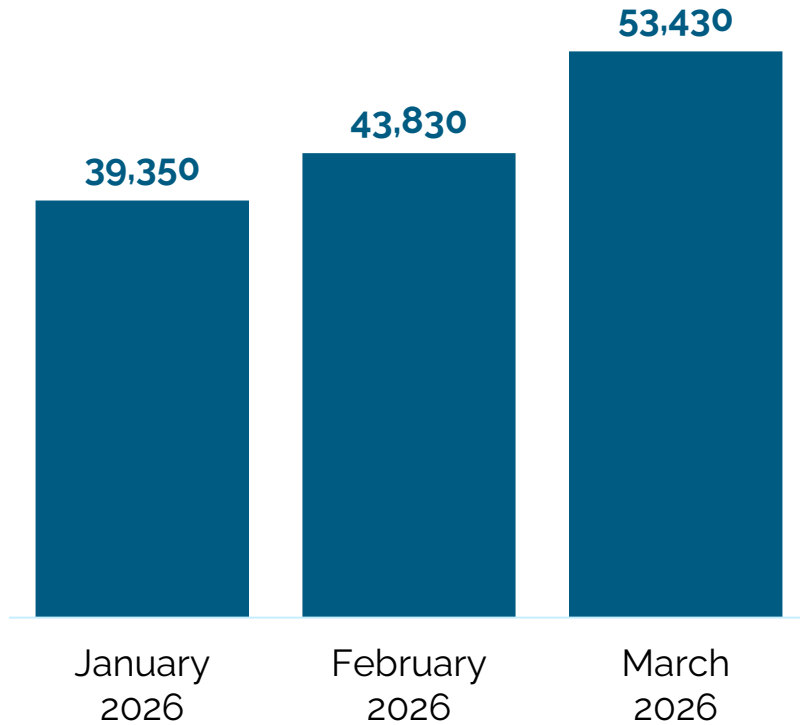
	January – March 2025	January – March 2026	% Δ
Occupancy ²	62.4%	59.8%	- 4.3%
ADR ²	\$276.34	\$286.55	+ 3.7%
RevPAR ²	\$172.55	\$171.26	- 0.7%
Room Nights ²	207,660	199,570	- 3.9%

¹Direct spending decreased despite higher ADR due to fewer paid visitors and lower spend per visitor outside of accommodations.

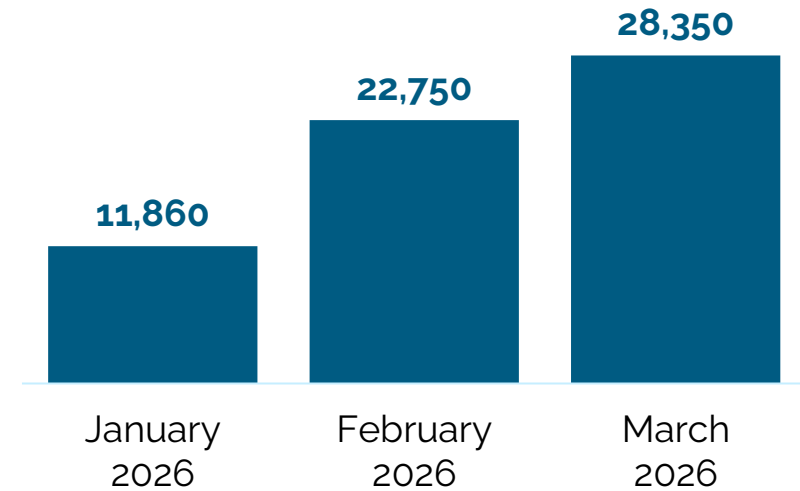
²Sources: Key Data, Smith Travel Research, Florida Department of Business and Professional Regulation.

MONTHLY ROOM NIGHTS*

Hotel Room Nights



Vacation Rental Room Nights



*Sources: Key Data, Smith Travel Research, Florida Department of Business and Professional Regulation.

MONTHLY VISITOR COUNTS

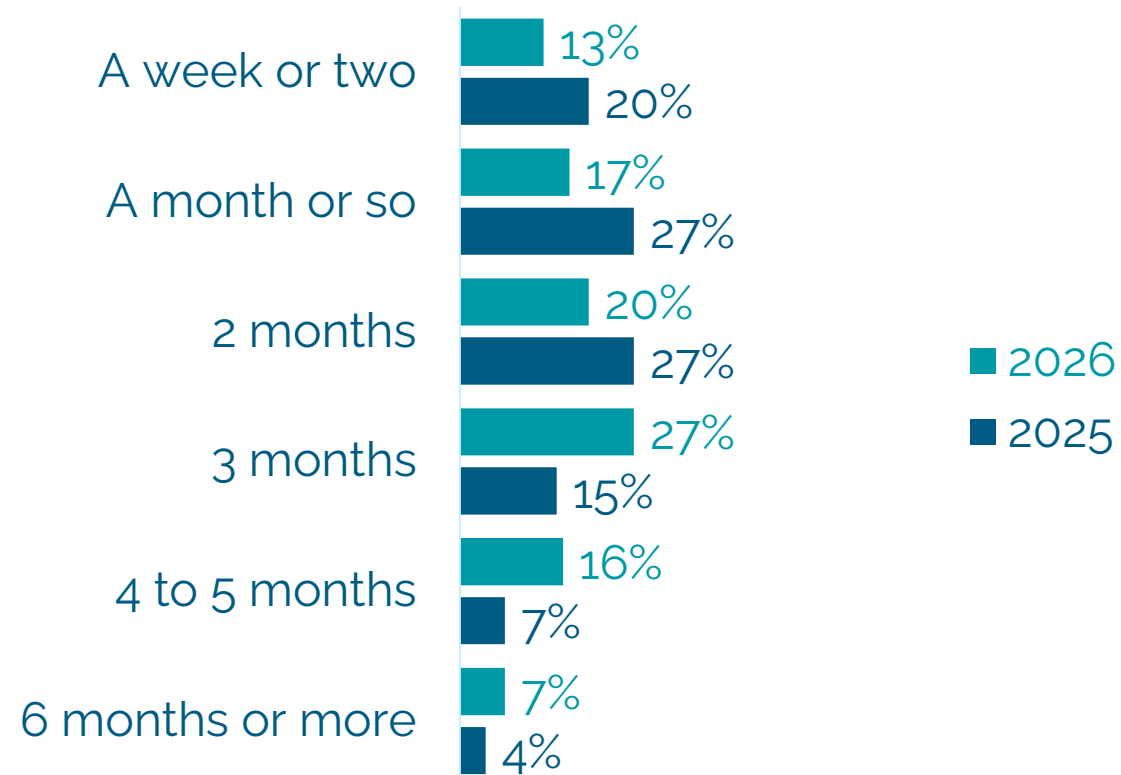
Accommodation Type	January Visitors	February Visitors	March Visitors
Hotel/motel/resort	27,970	36,620	40,340
Vacation rental	4,870	10,270	11,430
Non-paid accommodations*	10,880	14,240	15,680
Day tripper	11,090	14,520	15,990
Total	54,810	75,650	83,440

VISITOR JOURNEY: PRE-VISIT



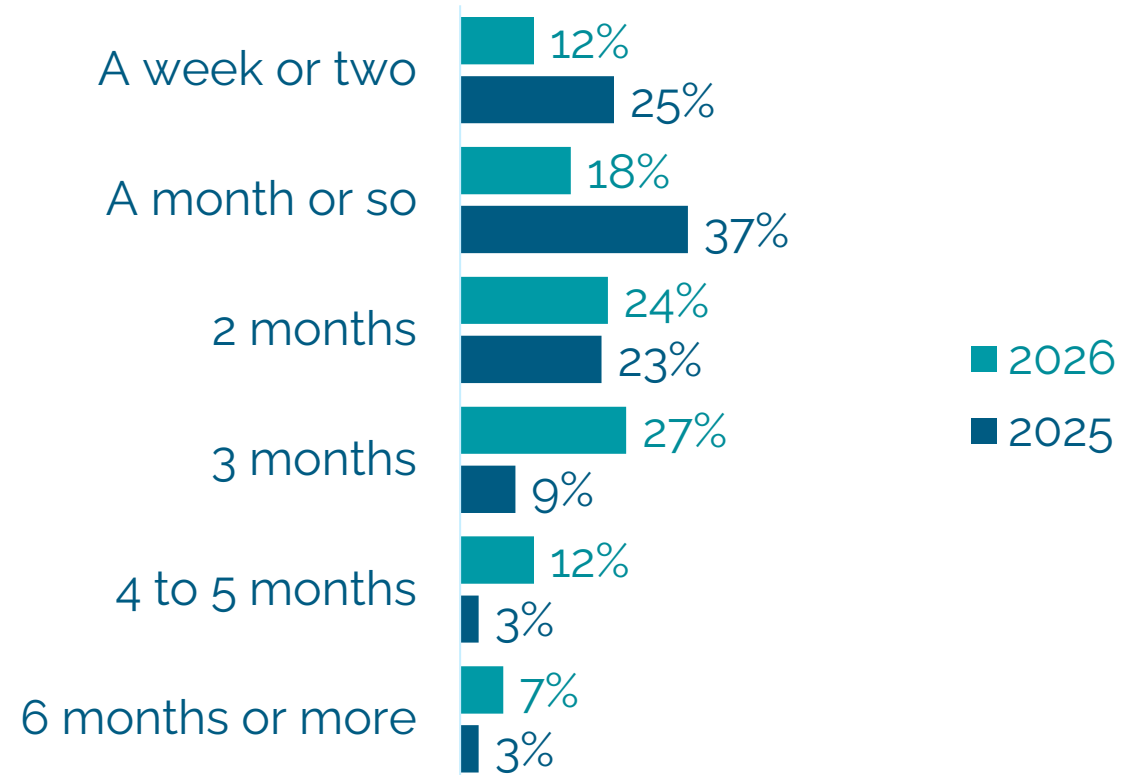
TRIP PLANNING CYCLE*

Average planning cycle: **75 days**



TRIP BOOKING CYCLE*

Average booking cycle: **73 days**

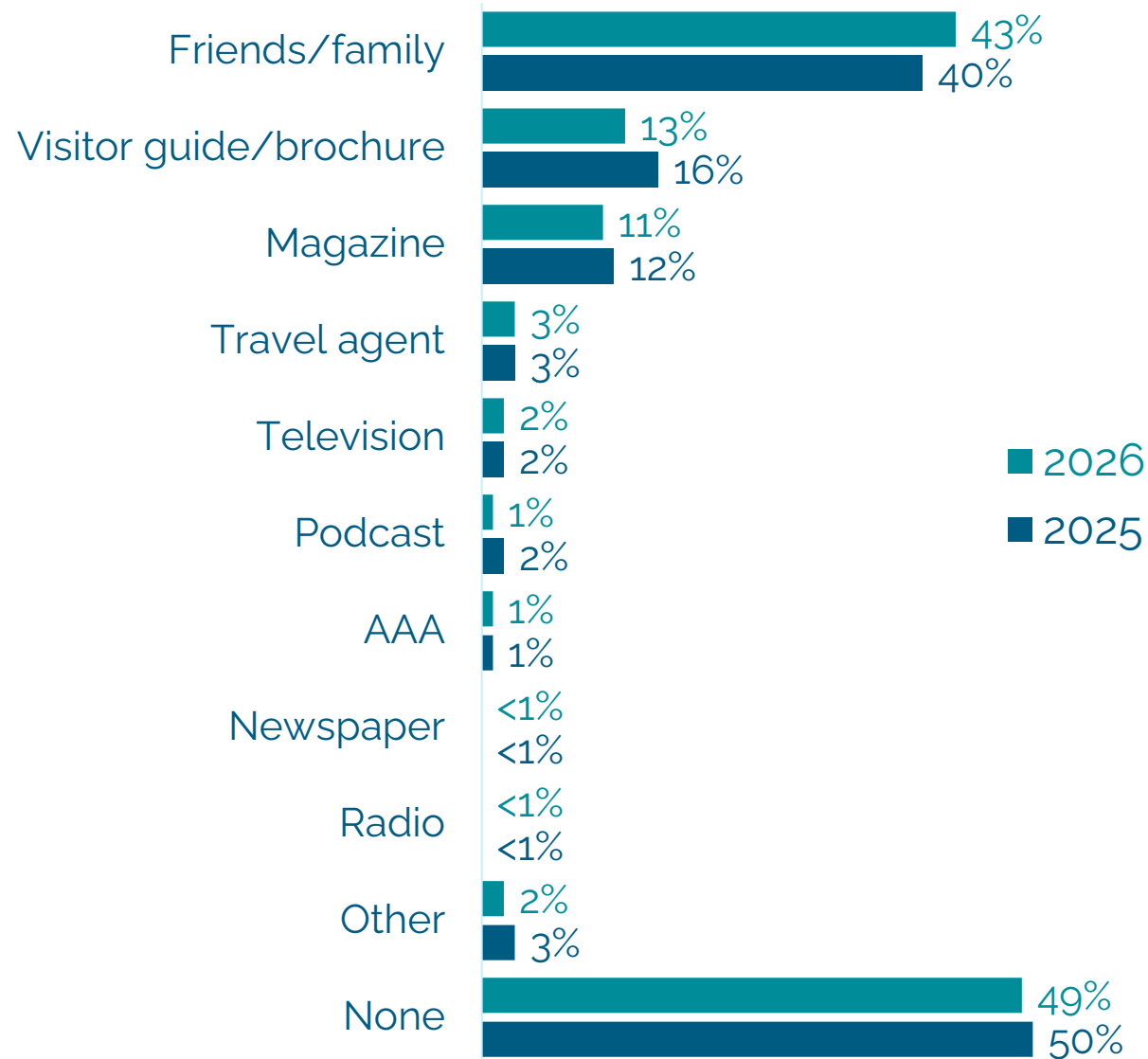


ONLINE TRIP PLANNING SOURCES*

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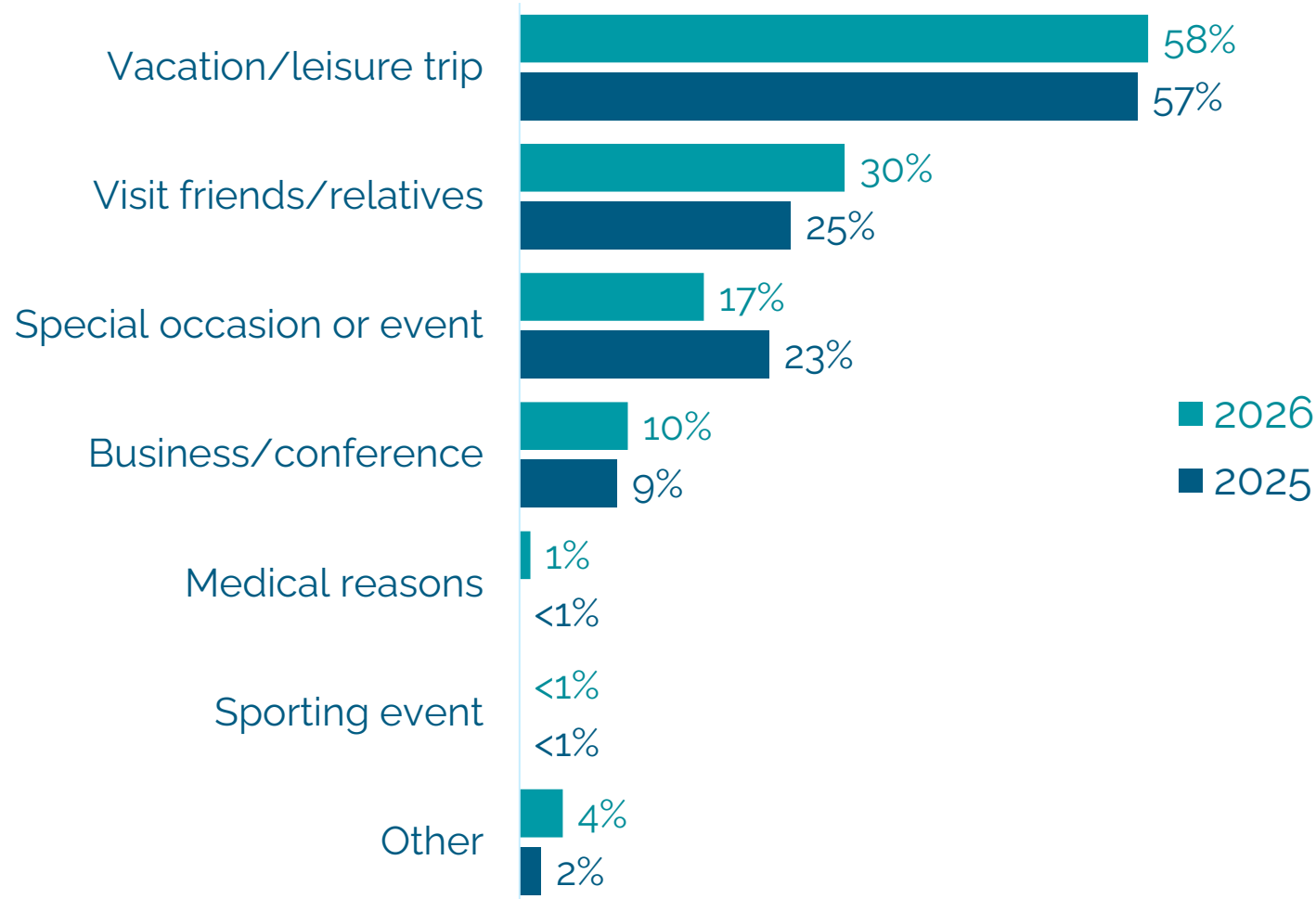
*Multiple responses permitted.
Based on visitors traveling for leisure.

OTHER TRIP PLANNING SOURCES*



*Multiple responses permitted.
Based on visitors traveling for leisure.

REASONS FOR VISITING*



DETAILED REASONS FOR VISITING*

Main Reasons for Visiting	2025	2026
Beach trip	45%	44%
History	22%	19%
Shopping	17%	15%
Foodie/culinary	10%	9%
Wedding/honeymoon	7%	6%
Company/government business	4%	6%
Girls/guys trip	5%	5%
Nature, bird watching, eco tours, etc.	5%	4%
Conference/convention/trade show	5%	4%
Golf or tennis	1%	4%
Festival	6%	2%
Birthday/anniversary	2%	2%
Water sports	1%	2%
Reunion	2%	1%
Biking, hiking, running, etc.	1%	1%
Art galleries, museums, cultural events	1%	1%
Breweries/distilleries	1%	1%
Concert	<1%	1%
Performing arts	<1%	1%

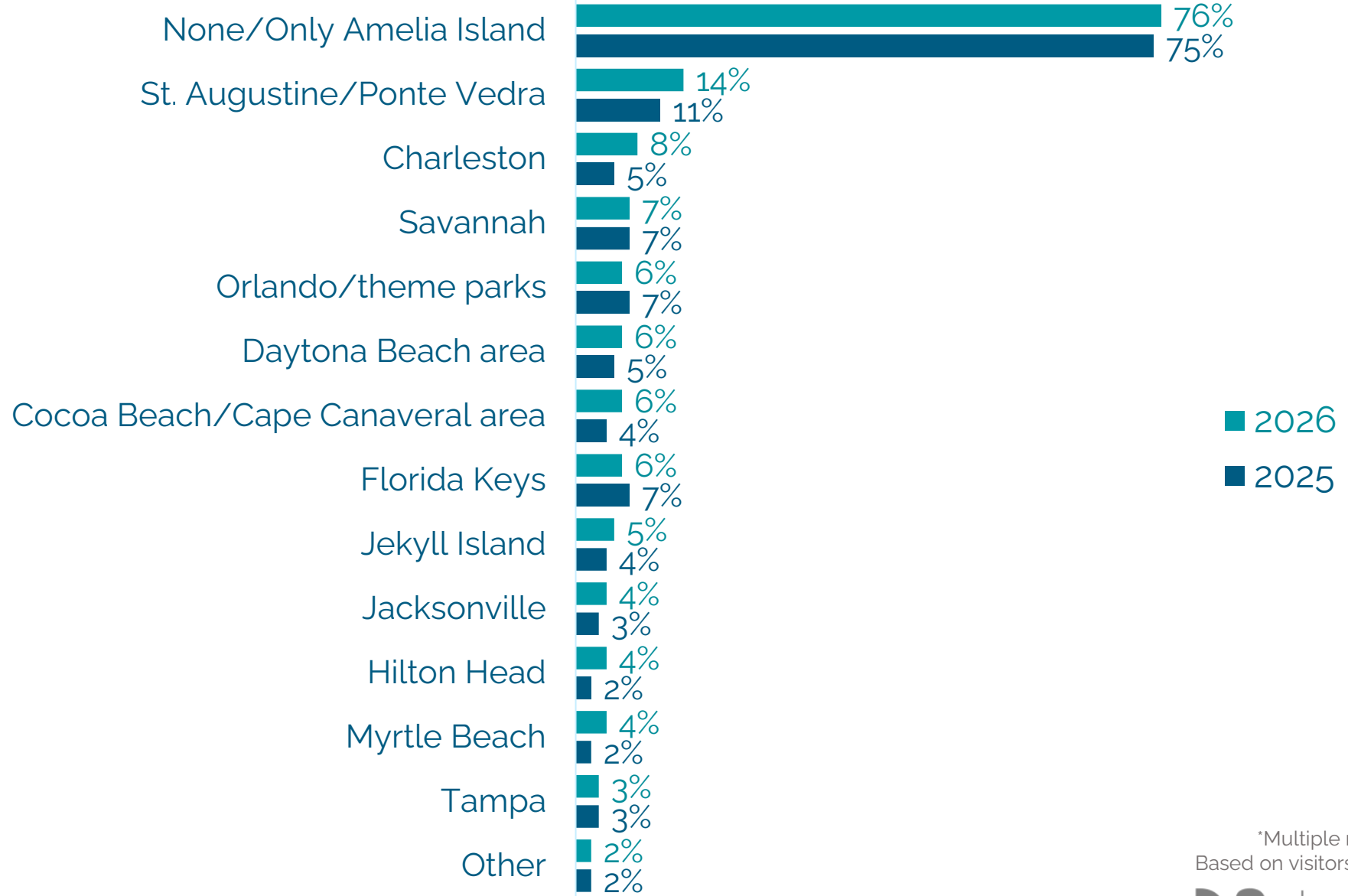
*Multiple responses permitted.
Based on all visitors traveling for leisure.

OPEN-ENDED REASONS FOR VISITING*



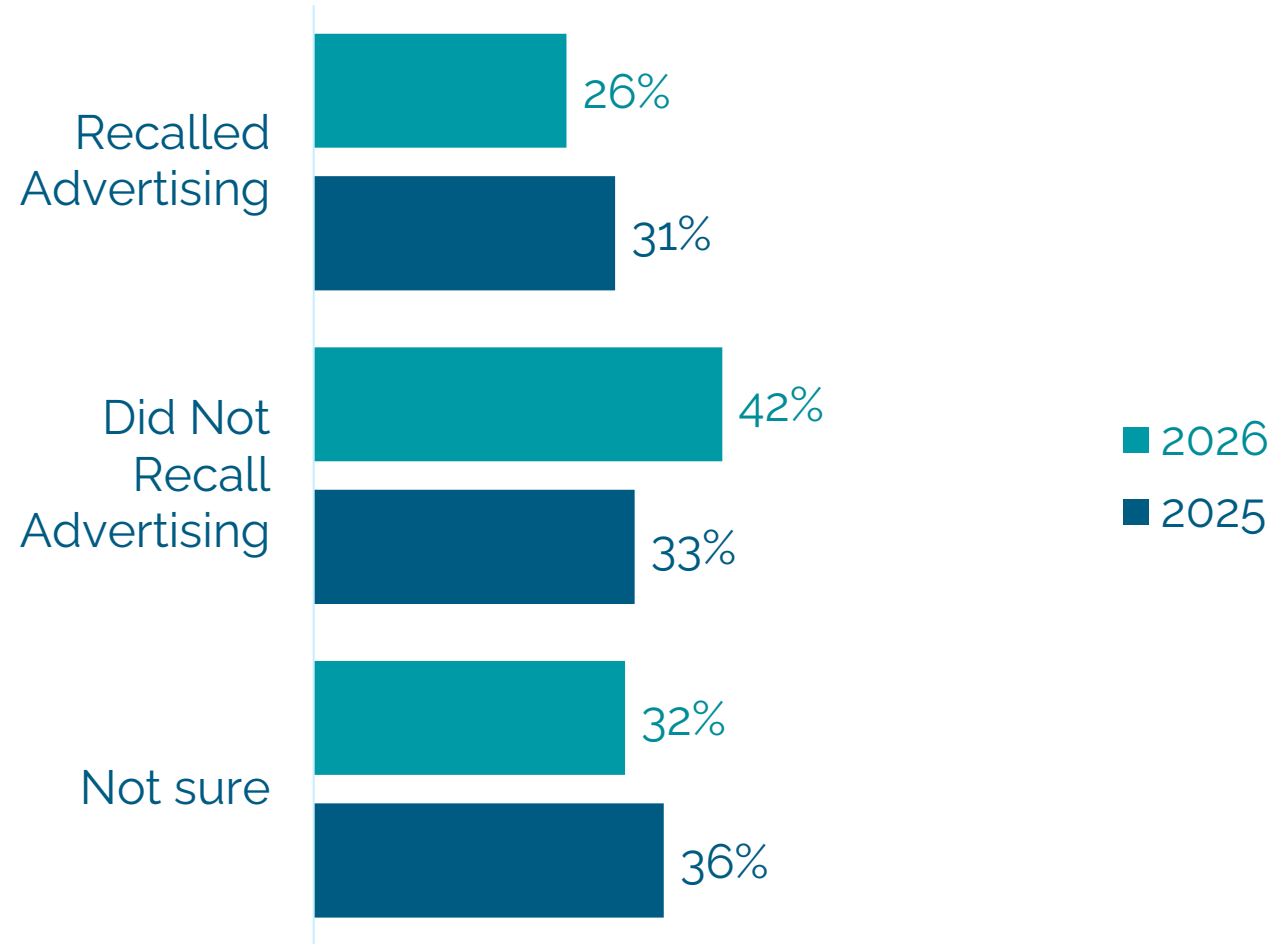
- “We came to visit friends and family in the area and decided to spend time on the island too.”
- “We’ve been here before and wanted to come back because we love it!”
- “We picked Amelia Island because it has just the right size and pace for a getaway.”
- “We wanted a place that felt less crowded and more relaxed than some of the other Florida destinations.”
- “We liked that it offered a great mix of beach, golf, restaurants, shopping, and fun.”
- “We came because the history and local attractions made it feel more interesting than other beach towns.”
- “We chose Amelia Island because it felt more affordable, manageable, and easy to enjoy.”

OTHER DESTINATIONS CONSIDERED*



*Multiple responses permitted.
Based on visitors traveling for leisure.

ADVERTISING RECALL*



ADVERTISING SOURCES*

Advertisements influenced **16%** of **all leisure visitors** to visit the Amelia Island area (**+7% points from 2025**).

Advertising Source	2025	2026
Online article	11%	20%
Amelia Island's social media	13%	8%
Magazine article	12%	5%
Ad on a website	9%	5%
Traveler reviews/blogs	7%	5%
Personal social media	7%	5%
Magazine ad	8%	4%
Travel/visitor guide	9%	4%
Television	4%	3%
Deal-based promotion	3%	2%
Video streaming services	2%	1%
Podcast	1%	1%
Weather app	1%	1%
Rental agency/other booking website	1%	1%
Billboard	1%	<1%
Music streaming services	<1%	<1%
Radio	<1%	<1%
Newspaper	1%	<1%
AAA	1%	<1%
Other	2%	1%

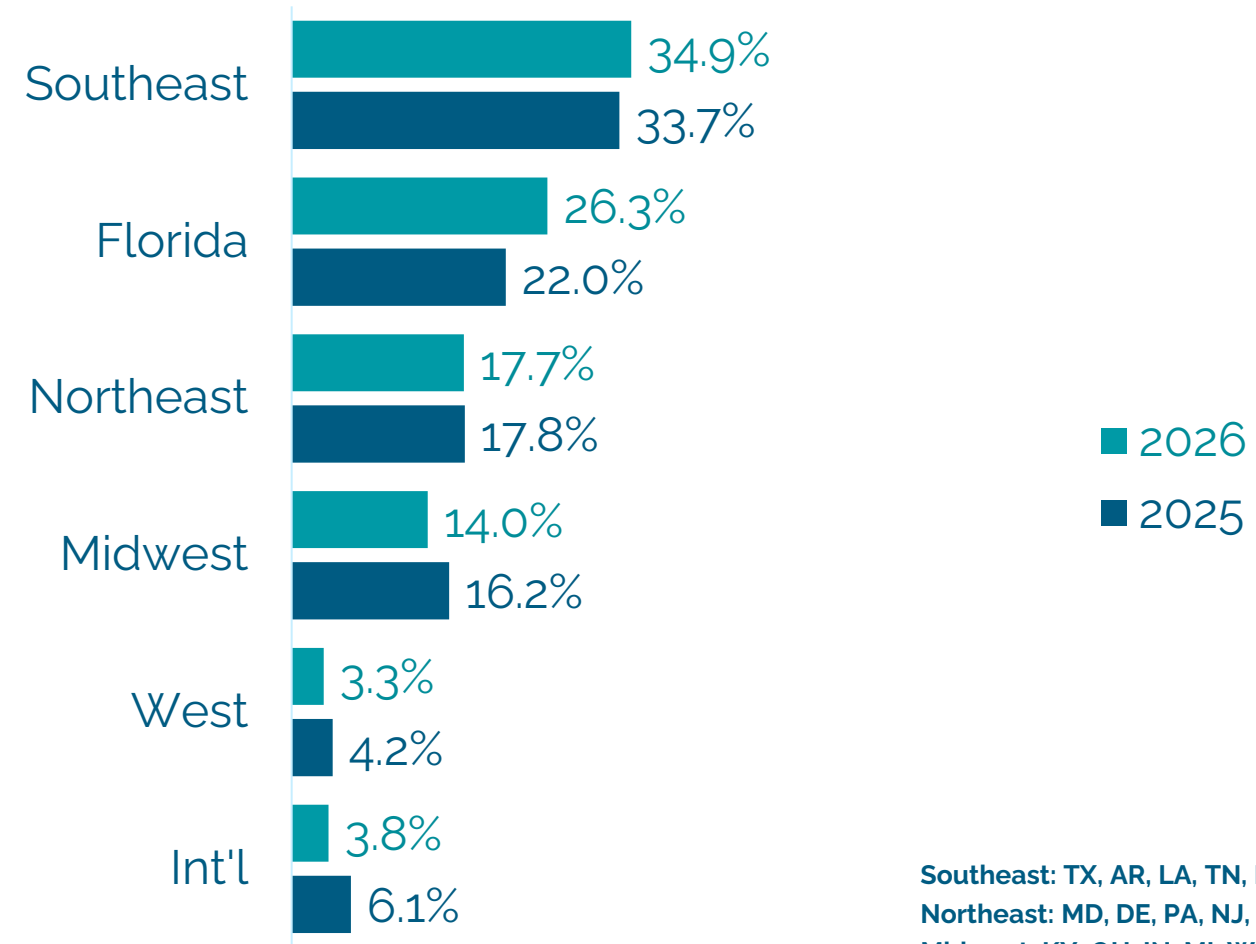
*Multiple responses permitted.
Based on all visitors traveling for leisure.



VISITOR JOURNEY: TRAVEL PARTY PROFILE



REGION OF ORIGIN



Southeast: TX, AR, LA, TN, MS, AL, VA, WV, NC, SC, GA
Northeast: MD, DE, PA, NJ, NY, CT, RI, MA, VT, NH, ME
Midwest: KY, OH, IN, MI, WI, IL, MN, IA, MO, ND, SD, NE, KS, OK
West: WA, OR, CA, NV, ID, MT, WY, CO, UT, AZ, NM, AK, HI

* The top international market was Canada (2.7%; -1.8% points from 2025).

TOP ORIGIN STATES

State	2025	2026
Florida	22.0%	26.3%
Georgia	12.1%	15.5%
North Carolina	6.0%	5.5%
New York	4.1%	3.9%
Pennsylvania	4.3%	3.9%
South Carolina	3.8%	3.6%
Virginia	3.2%	2.9%
Tennessee	2.5%	2.7%
Ohio	2.8%	2.4%
Massachusetts	2.5%	2.3%



TOP ORIGIN MARKETS

Top Origin Markets – All Visitors

Market	2025	2026
Jacksonville ¹	14.4%	20.8%
Atlanta	4.1%	5.4%
New York City ²	4.3%	4.2%
Orlando-Daytona Beach-Melbourne	4.3%	4.1%
Savannah	2.0%	3.2%
Boston	3.1%	2.6%
Charlotte	3.6%	2.6%
Washington, DC-Hagerstown ³	2.4%	2.6%
Philadelphia	2.2%	2.3%
Tampa-St. Petersburg	2.2%	2.1%

Top Origin Markets – Overnight Visitors

Market	2025	2026
Jacksonville ¹	4.1%	8.0%
Atlanta	4.9%	7.0%
New York City ²	5.3%	5.1%
Orlando-Daytona Beach-Melbourne	4.4%	3.9%
Savannah	1.5%	3.0%
Charlotte	4.3%	3.0%
Washington, DC-Hagerstown ³	2.8%	3.0%
Boston	3.5%	2.8%
Tampa-St. Petersburg	2.5%	2.6%
Philadelphia	2.4%	2.5%
Miami-Fort Lauderdale	1.9%	2.3%

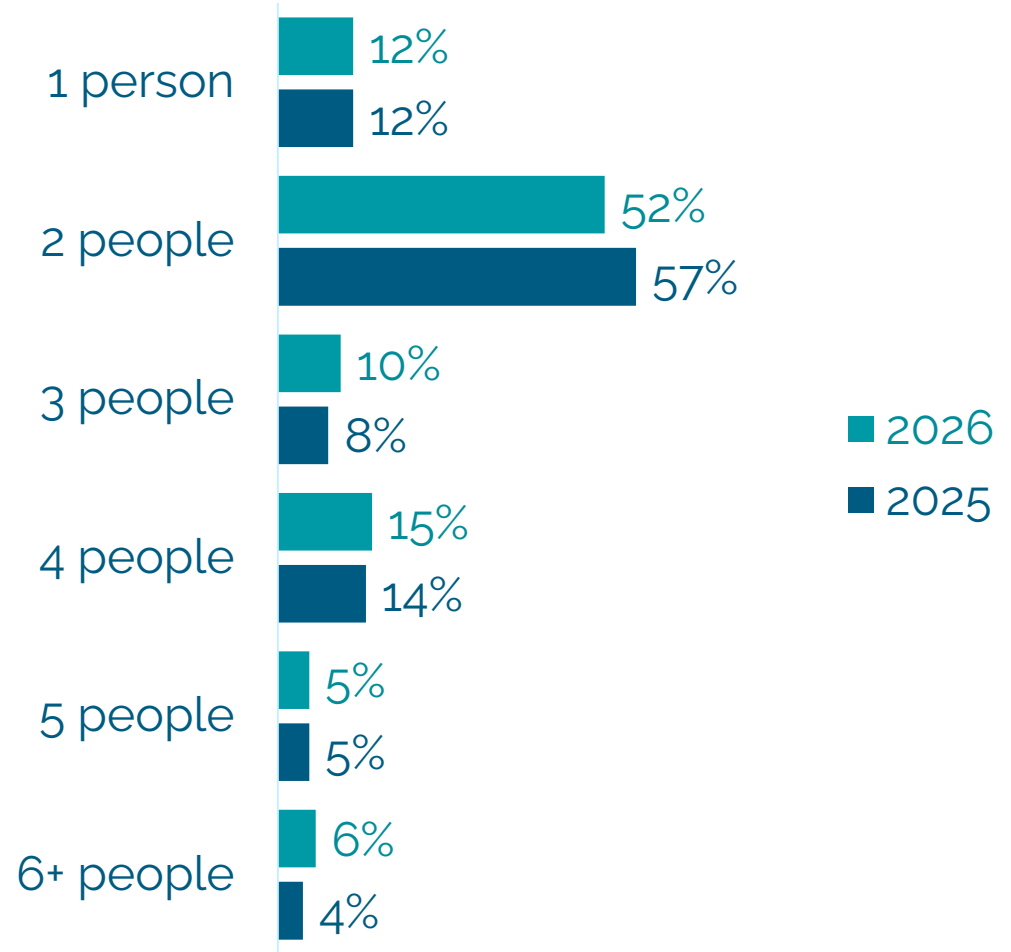
¹Includes Jacksonville, FL and Brunswick, GA.

²Includes parts of New York, New Jersey, and Connecticut.

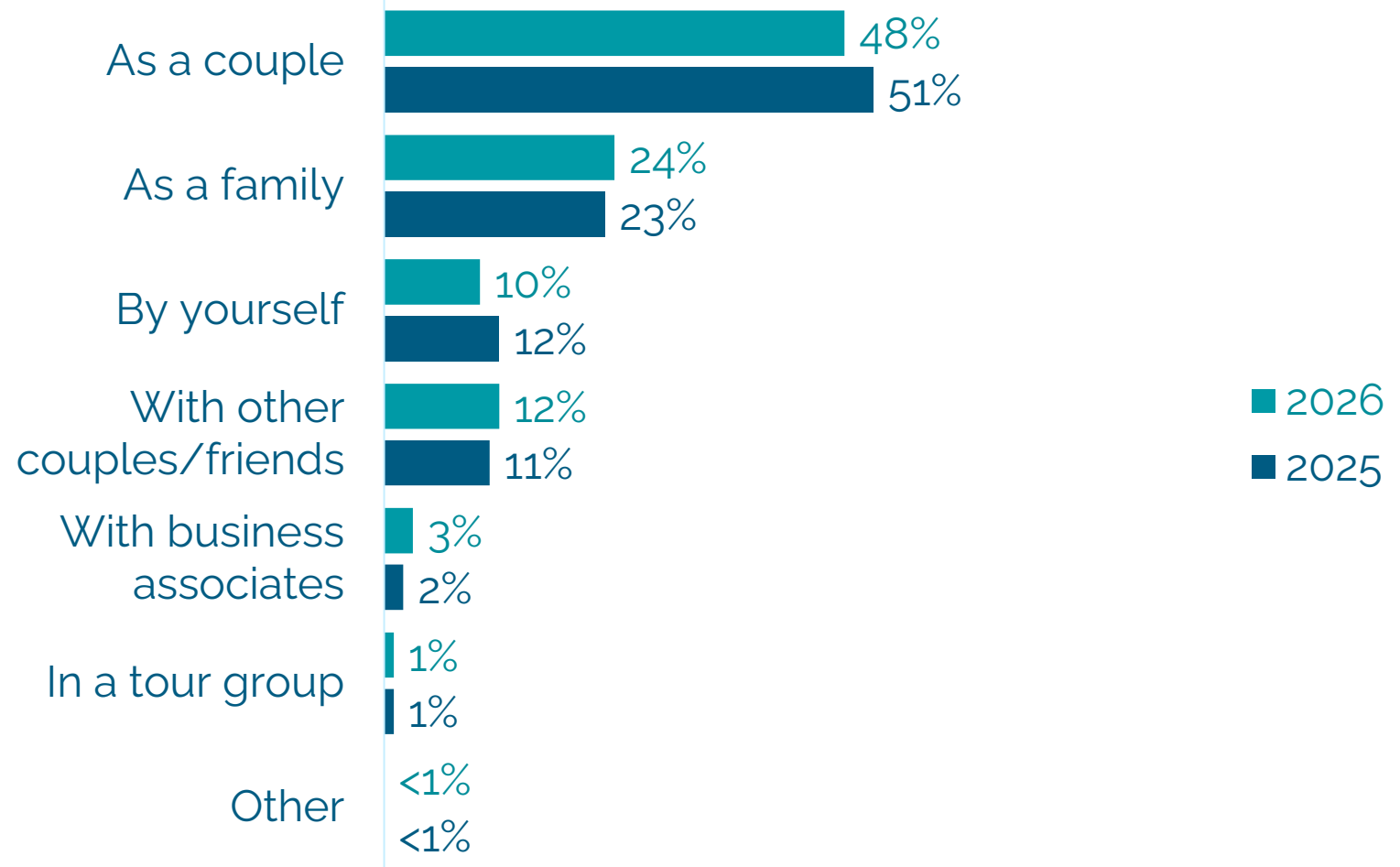
³Includes parts of Maryland, Virginia, West Virginia, and Pennsylvania.

TRAVEL PARTY SIZE

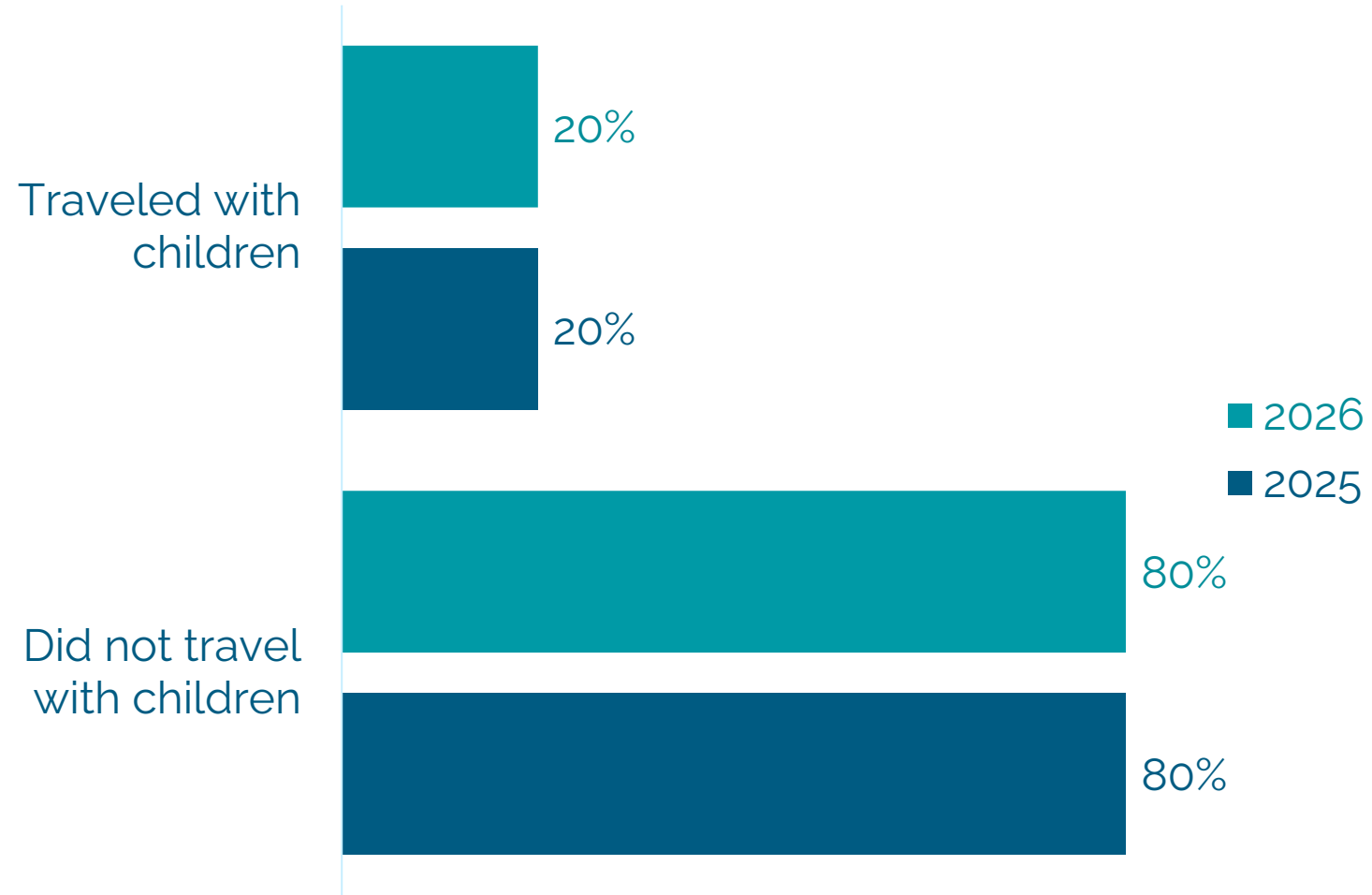
Average travel party size: **2.8**
(-0.1 from 2025)



TRAVEL PARTY TYPE

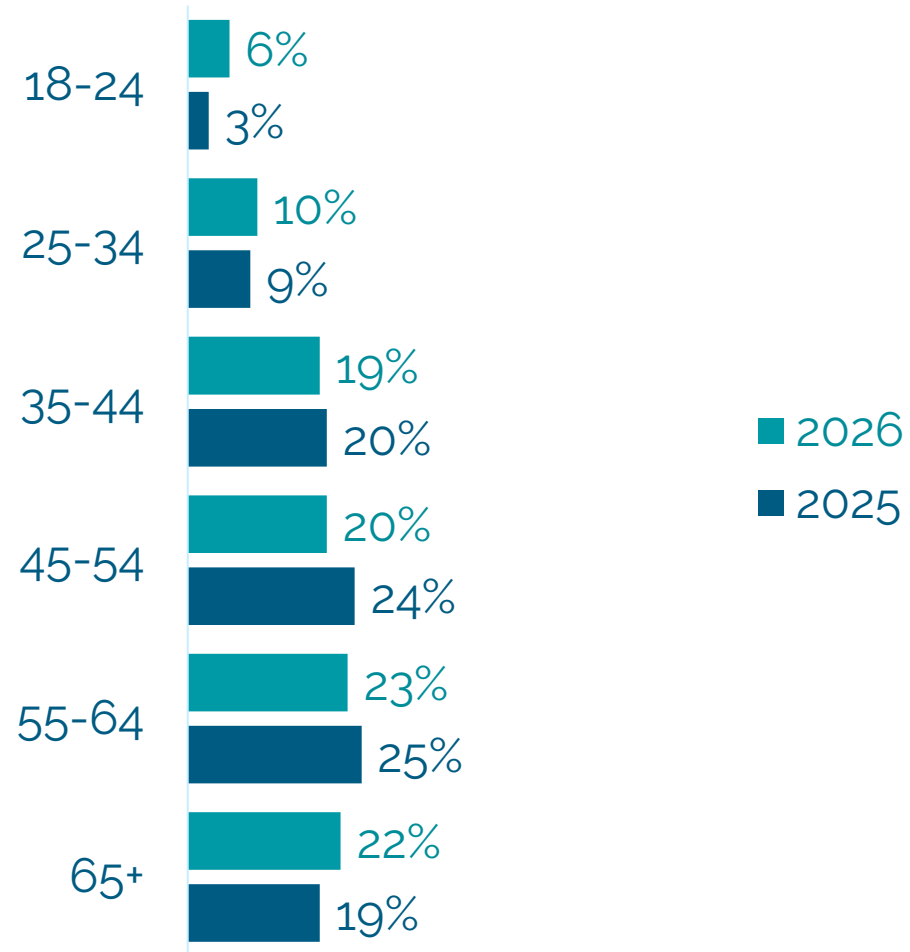


TRAVELED WITH CHILDREN



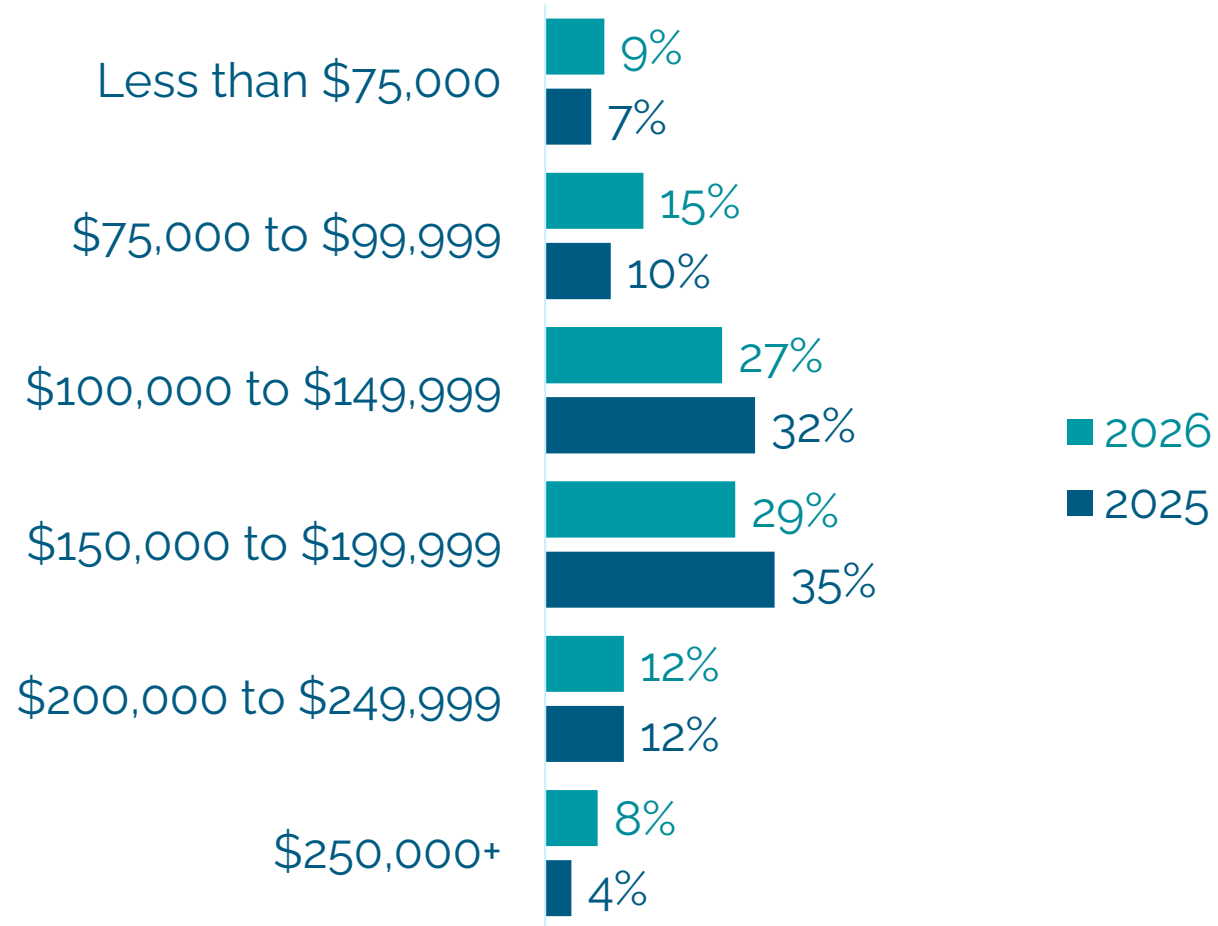
AGE

Median age: **52**
(same as 2025)

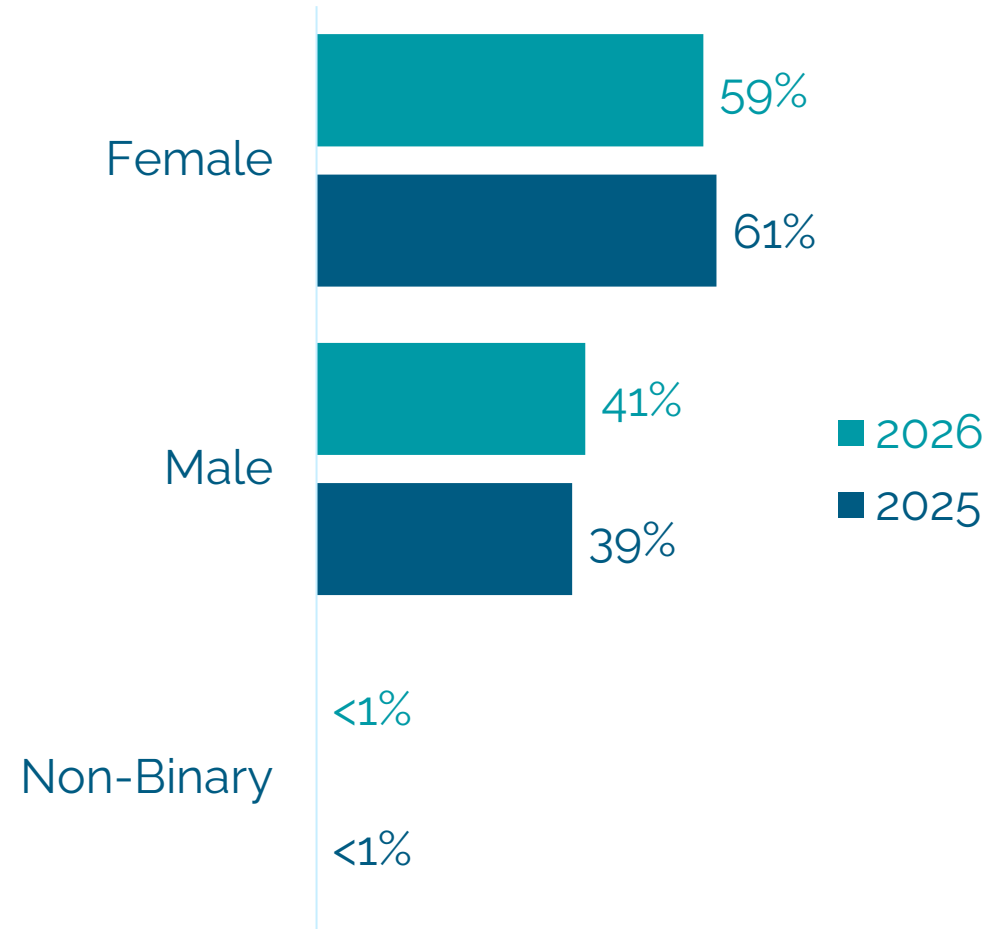


HOUSEHOLD INCOME

Median household income: **\$148,100**
(+ \$4,350 from 2025)

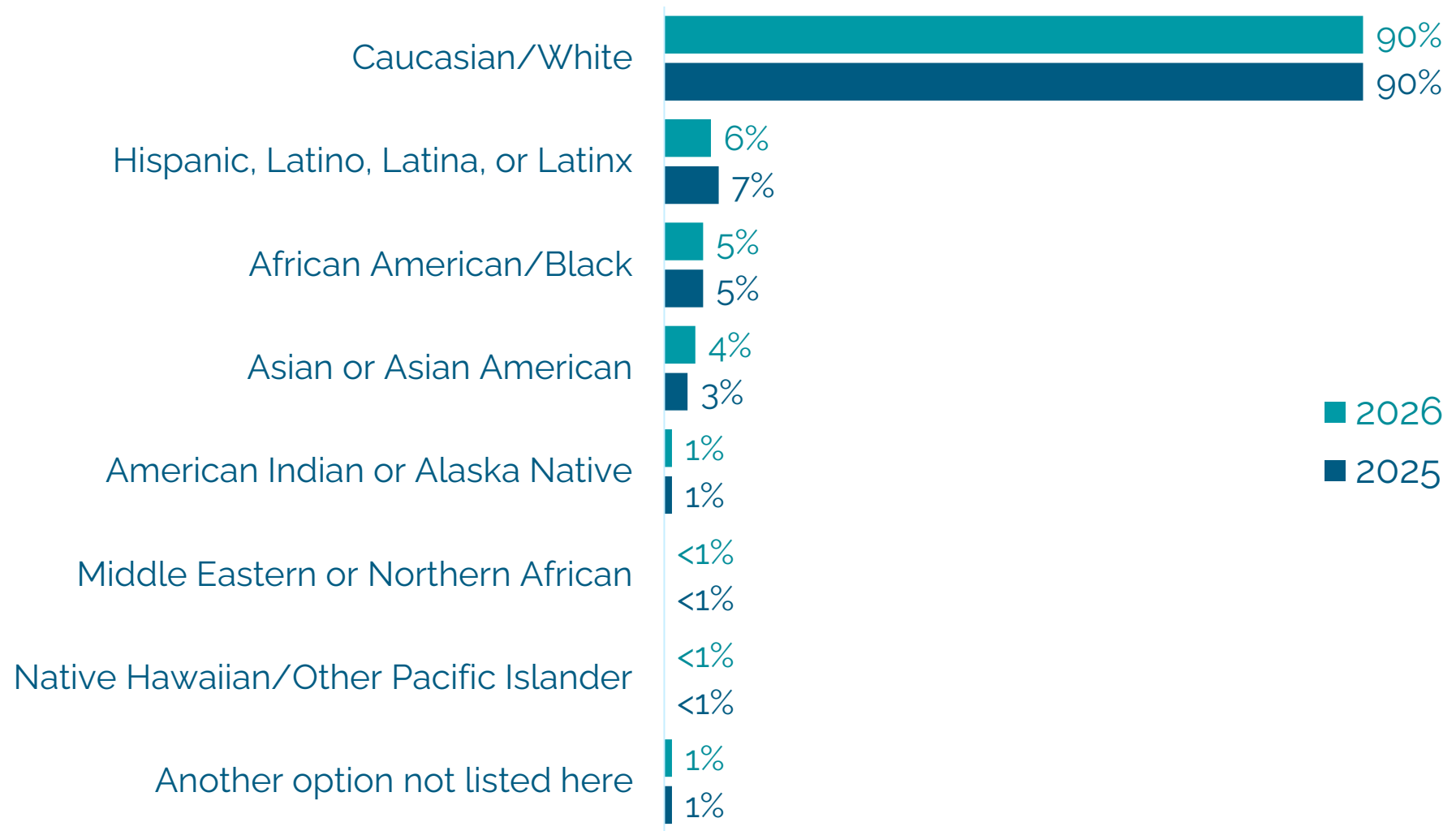


GENDER*

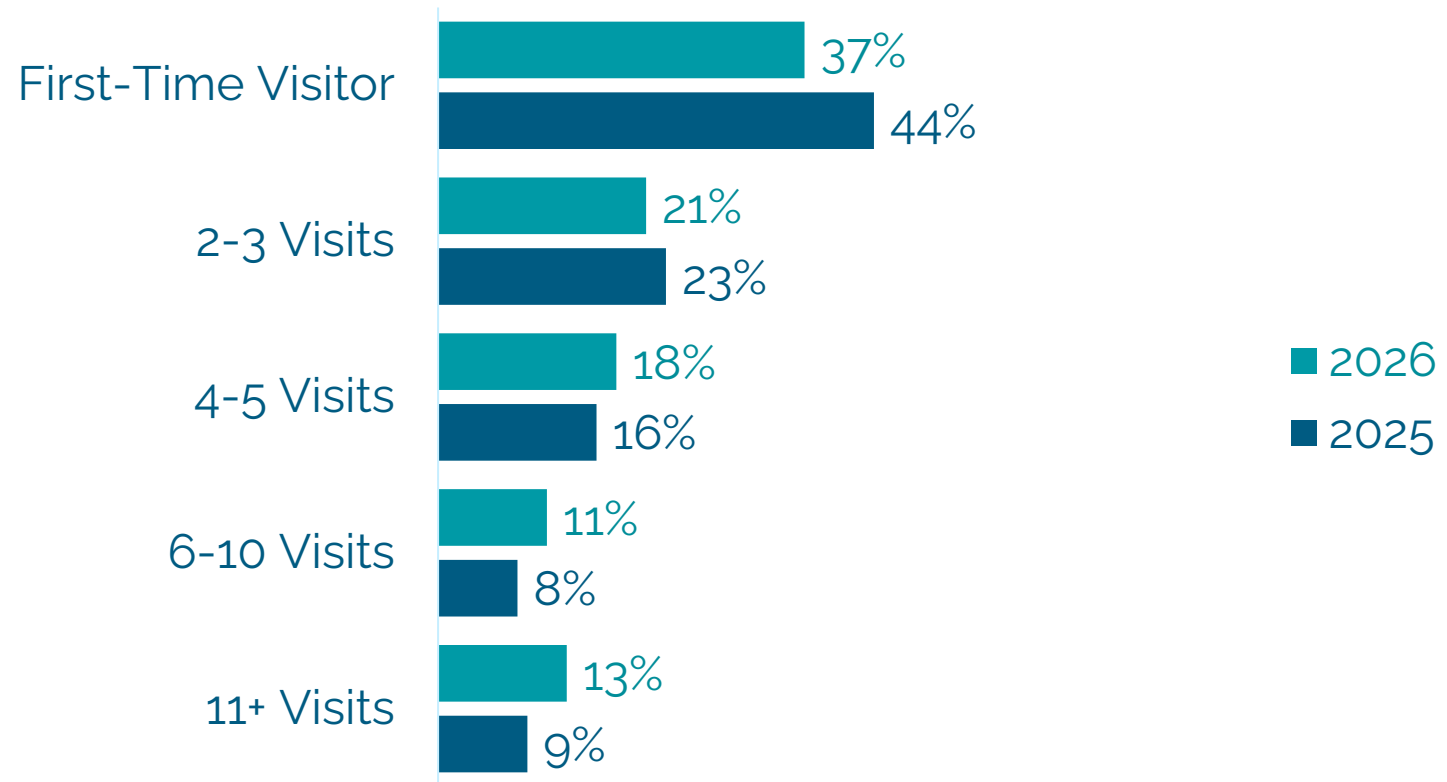


*Gender of member of travel party interviewed. May be influenced by visitors' willingness to complete a survey.

RACE*



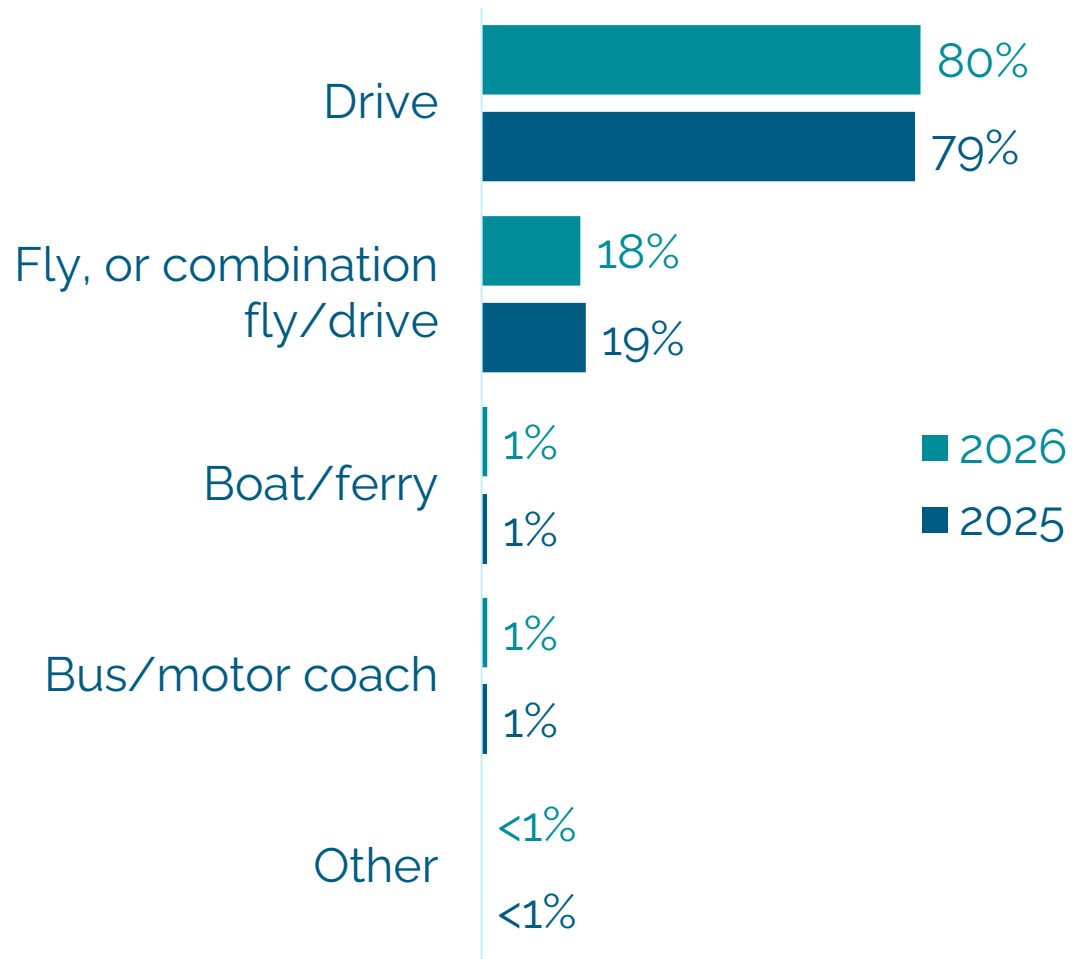
NEW & RETURNING VISITORS



VISITOR JOURNEY: TRIP EXPERIENCE

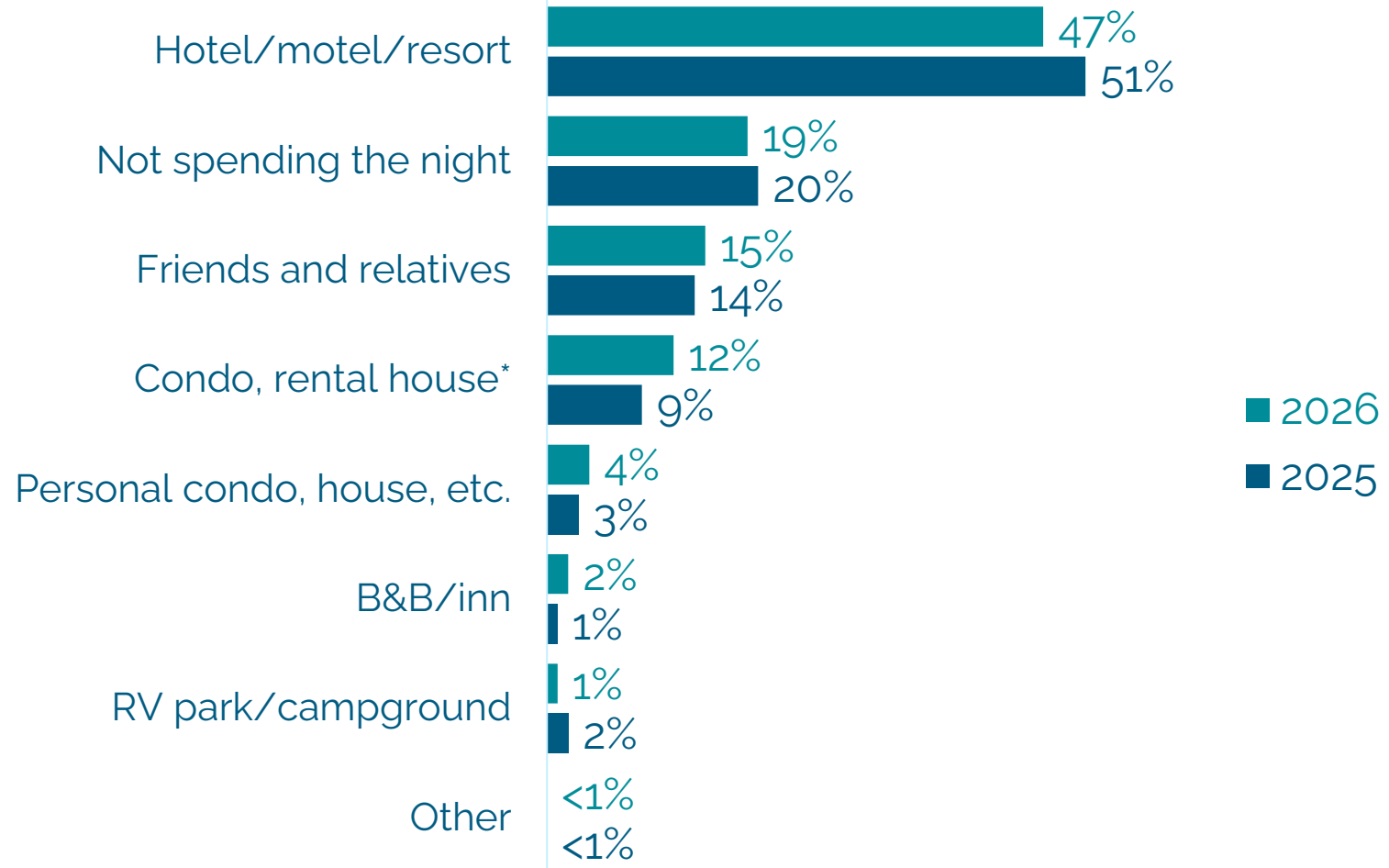


TRANSPORTATION



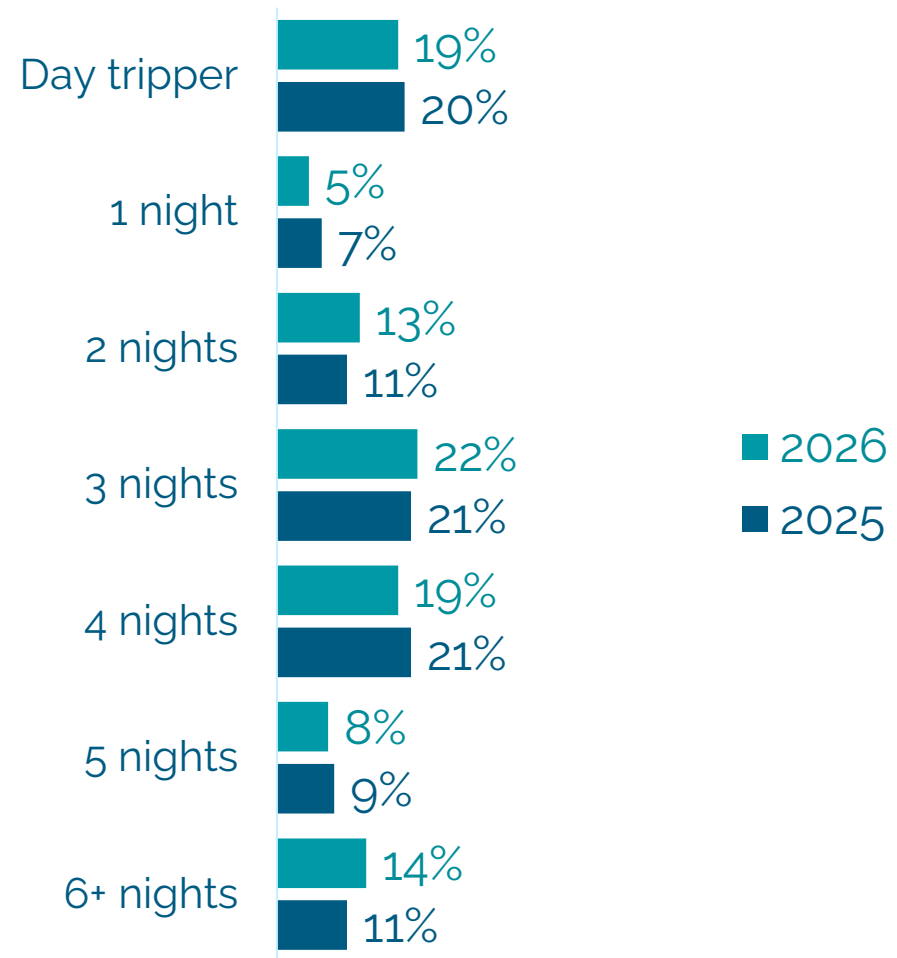
*16% of all visitors used the Jacksonville International Airport (-1% point from 2025).

ACCOMMODATIONS

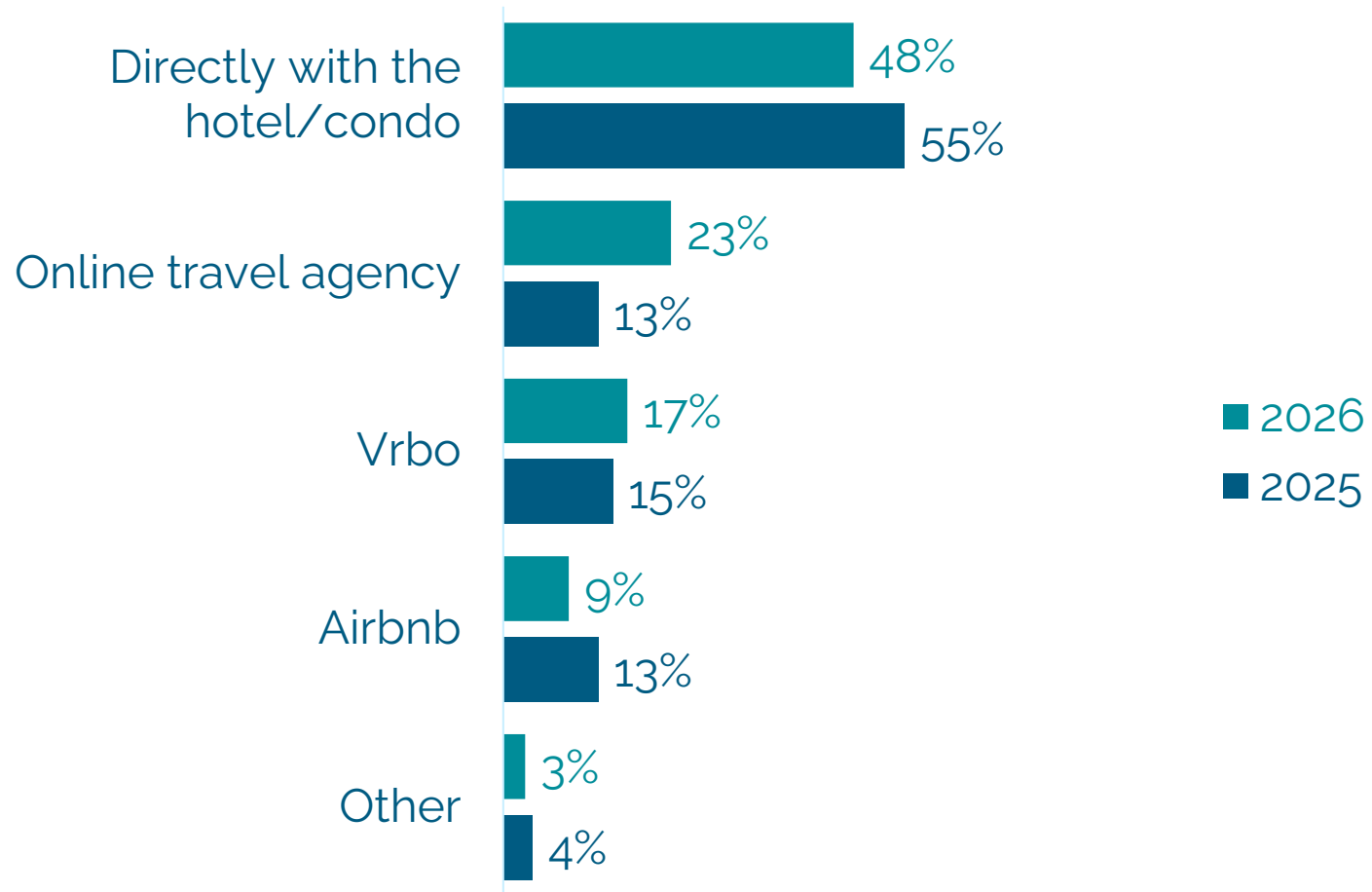


NIGHTS STAYED

Average nights stayed (all visitors): **3.6 (+0.1 from 2025)**
Average nights stayed (paid visitors): **4.2 (+0.1 from 2025)**



ACCOMMODATION BOOKING



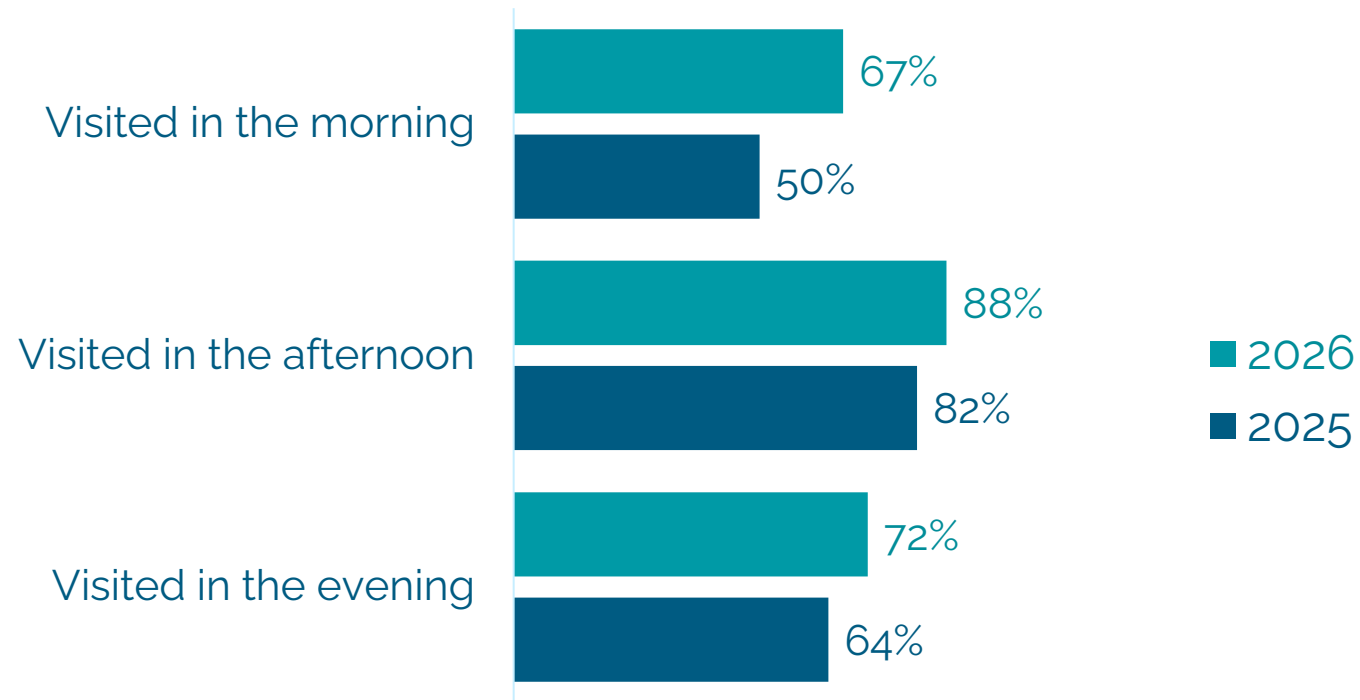
VISITOR ACTIVITIES*

Activity	2025	2026
Dining out	76%	76%
Historic Downtown Fernandina Beach	73%	73%
Beach	62%	66%
Shopping	57%	60%
Visit friends/relatives	31%	34%
Farmers market	20%	26%
Bars, nightclubs	12%	25%
Attractions	25%	20%
Family time	16%	20%
Biking, hiking, running, etc.	18%	20%
State parks	13%	14%
Golf or tennis	7%	13%
Art galleries, museums	7%	11%
Business meetings/conferences	7%	8%
Water sports	6%	7%
Special events	4%	3%
Attend/participate in a sporting event	3%	3%
Spas	2%	3%
Horseback riding	1%	<1%
Other	2%	3%

*Multiple responses permitted.

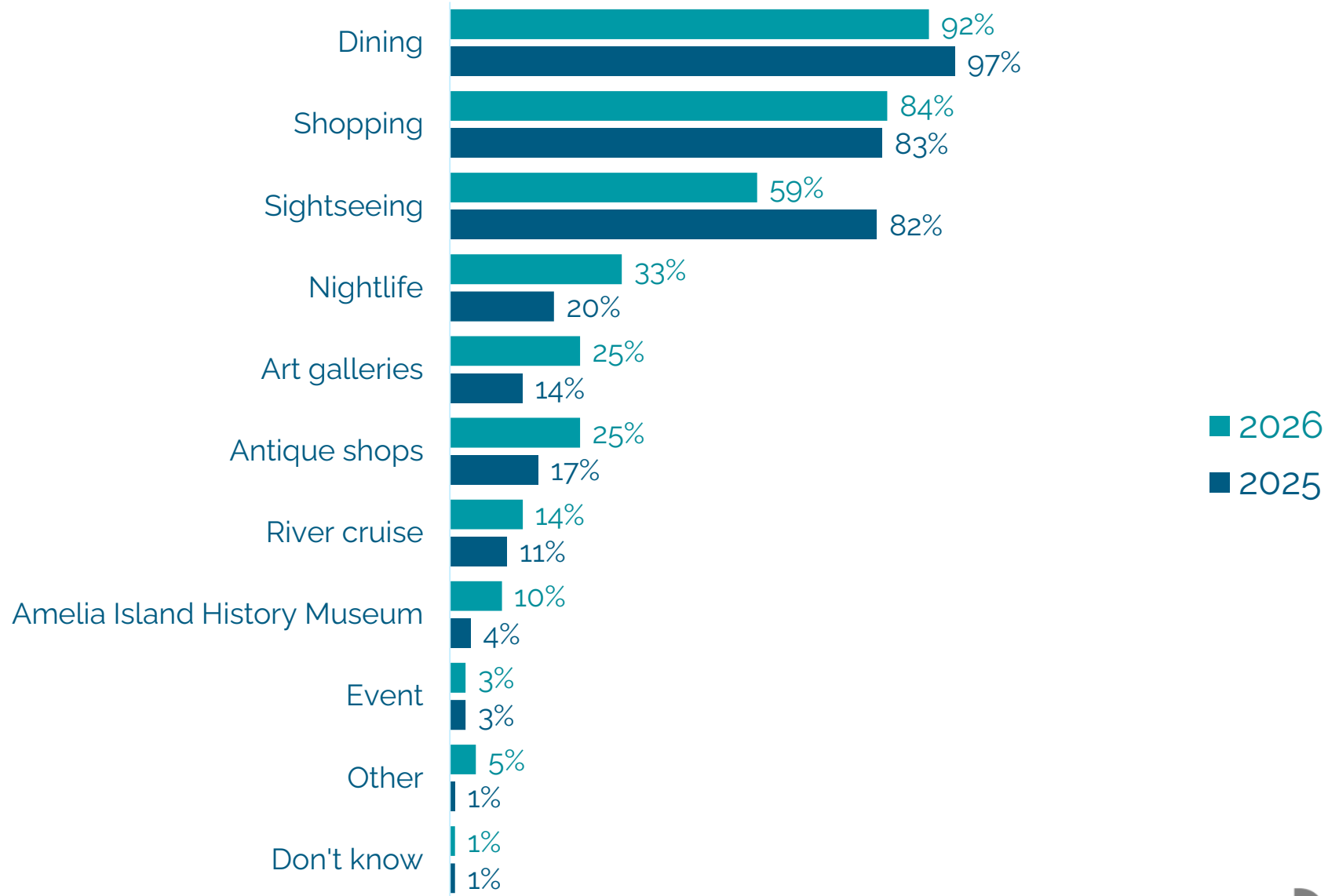
VISITING HISTORIC DOWNTOWN*

Average days visited per trip: **2.7**
(-0.1 from 2025)



*Multiple responses permitted.
Based on all visitors to Historic Downtown.

REASON FOR VISITING HISTORIC DOWNTOWN*

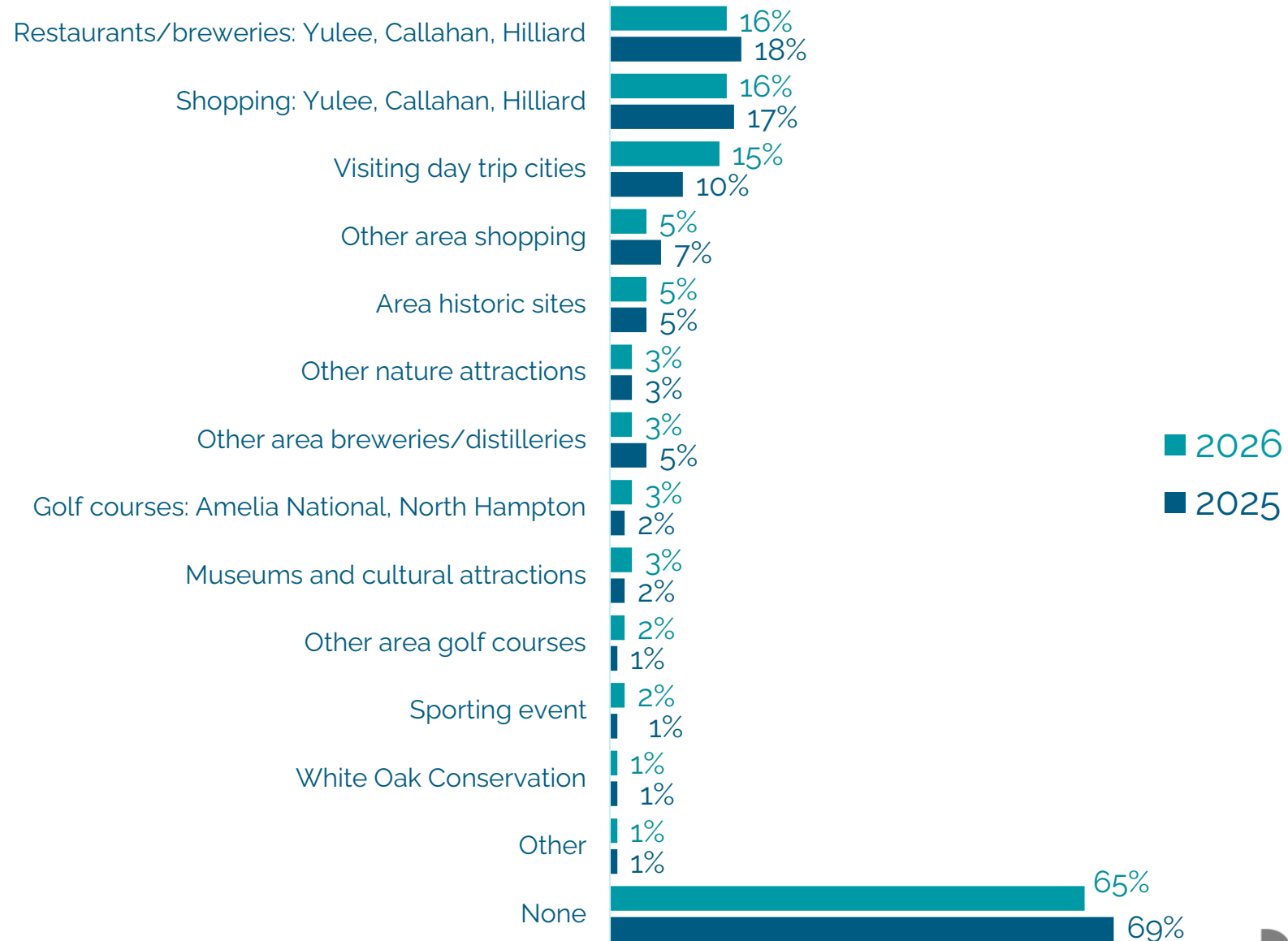


AREAS FOR IMPROVEMENT: DOWNTOWN*



- » Visitors love downtown's history and architecture, memorial benches, dog friendliness, and walkable feel
- » Ideas for improvement:
 - » More free parking options
 - » Clearer parking rules and a simpler parking app
 - » More varied stores
 - » More seating and gathering spaces
 - » More kid-friendly activities
 - » More live music and entertainment
 - » More diverse food options

OFF-ISLAND ACTIVITIES*



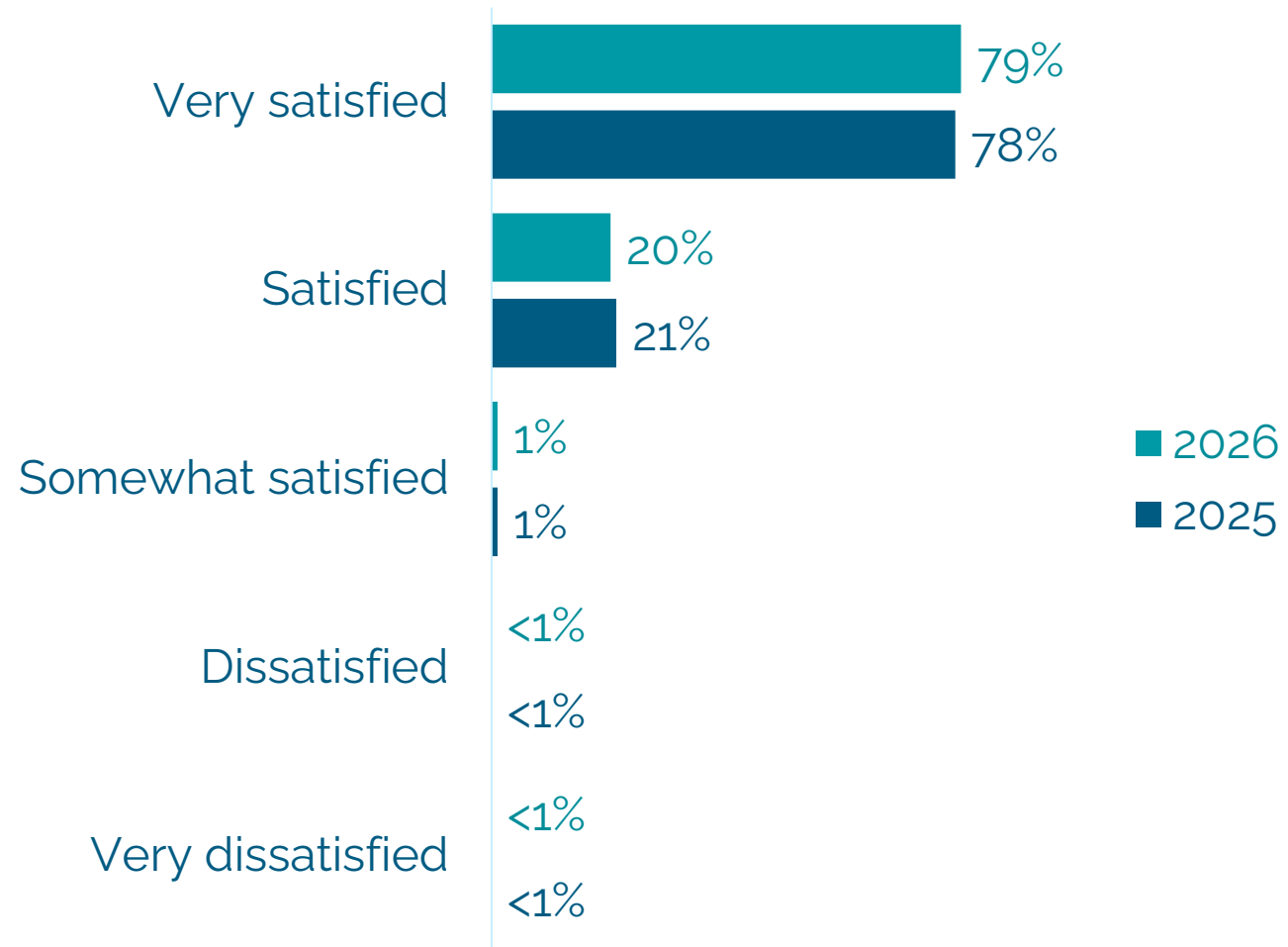
TRAVEL PARTY SPENDING

Category	Daily Spending		Total Spending	
	2025	2026	2025	2026
Accommodations	\$174	\$176	\$609	\$634
Restaurants	\$156	\$160	\$546	\$576
Groceries	\$35	\$29	\$123	\$104
Shopping	\$93	\$75	\$326	\$270
Activities & attractions	\$38	\$40	\$133	\$144
Transportation	\$32	\$27	\$112	\$97
Other	\$8	\$12	\$28	\$43
Total	\$536	\$519	\$1,877	\$1,868

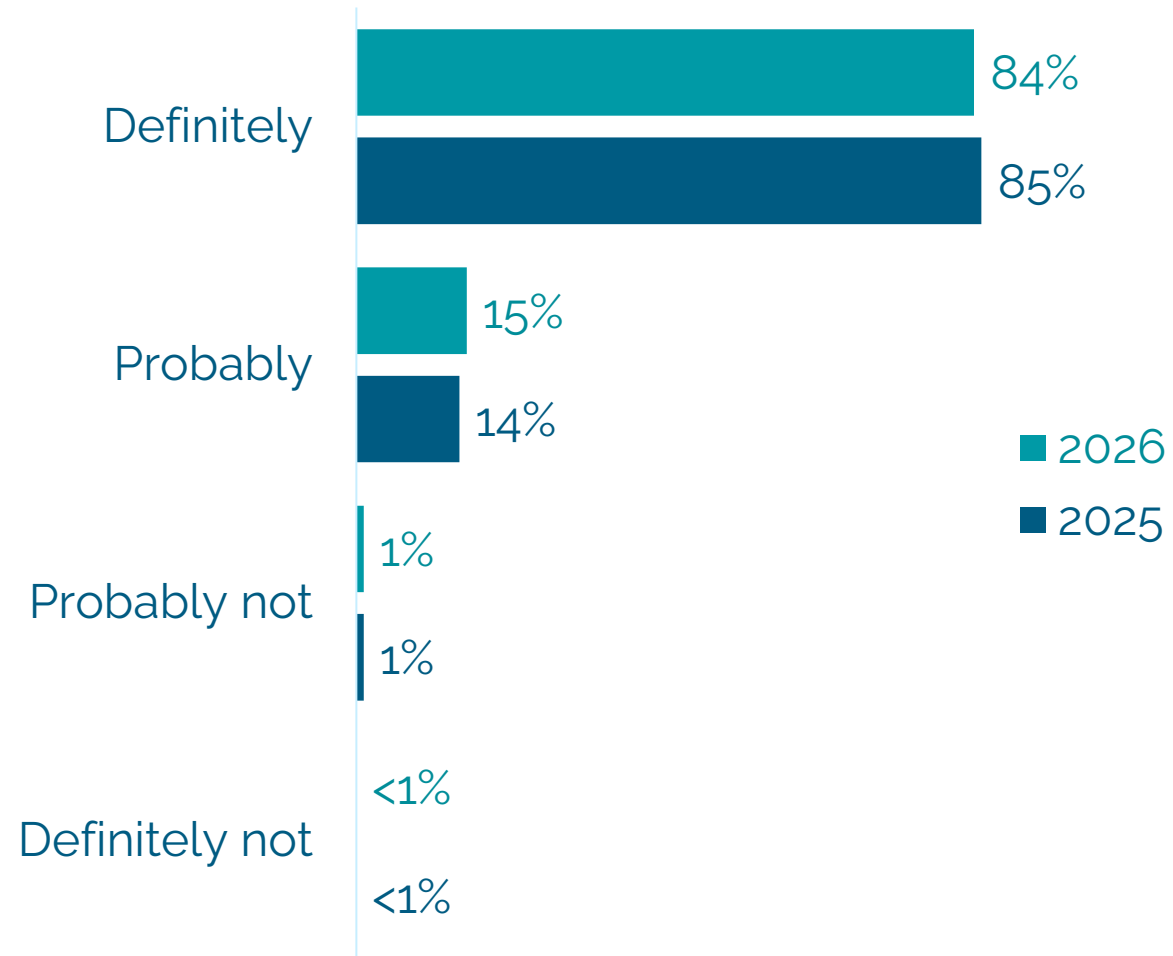
VISITOR JOURNEY: POST-TRIP



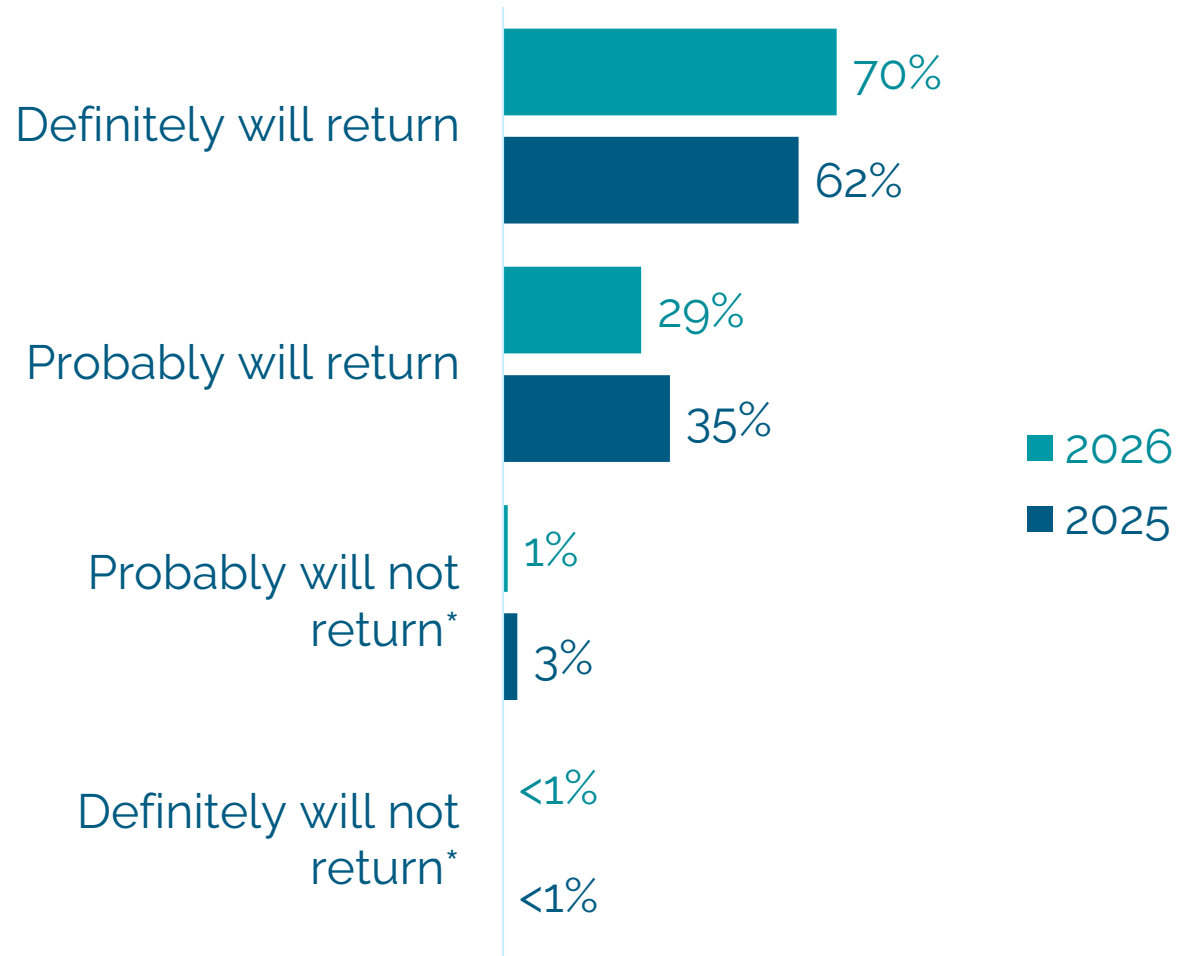
VISITOR SATISFACTION



RECOMMENDATION



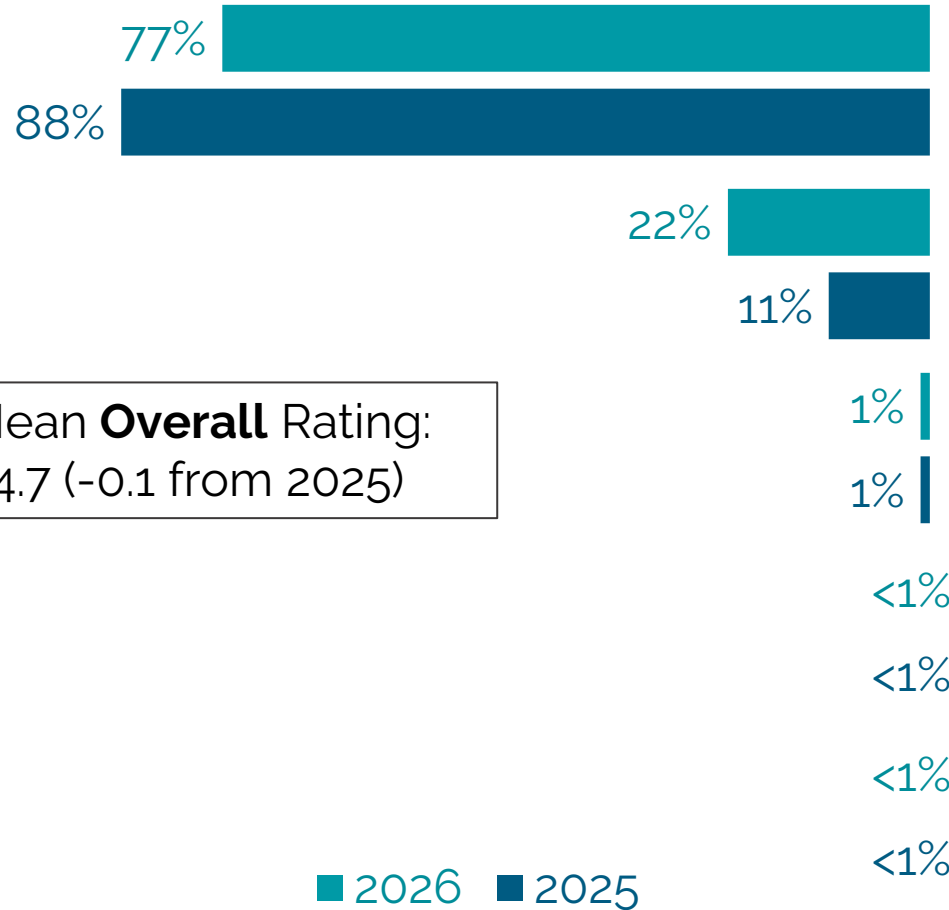
LIKELIHOOD OF RETURNING



*Top reasons for not returning were 1) a preference for variety in vacation spots, 2) only having gone for a specific occasion, and 3) problems with parking.

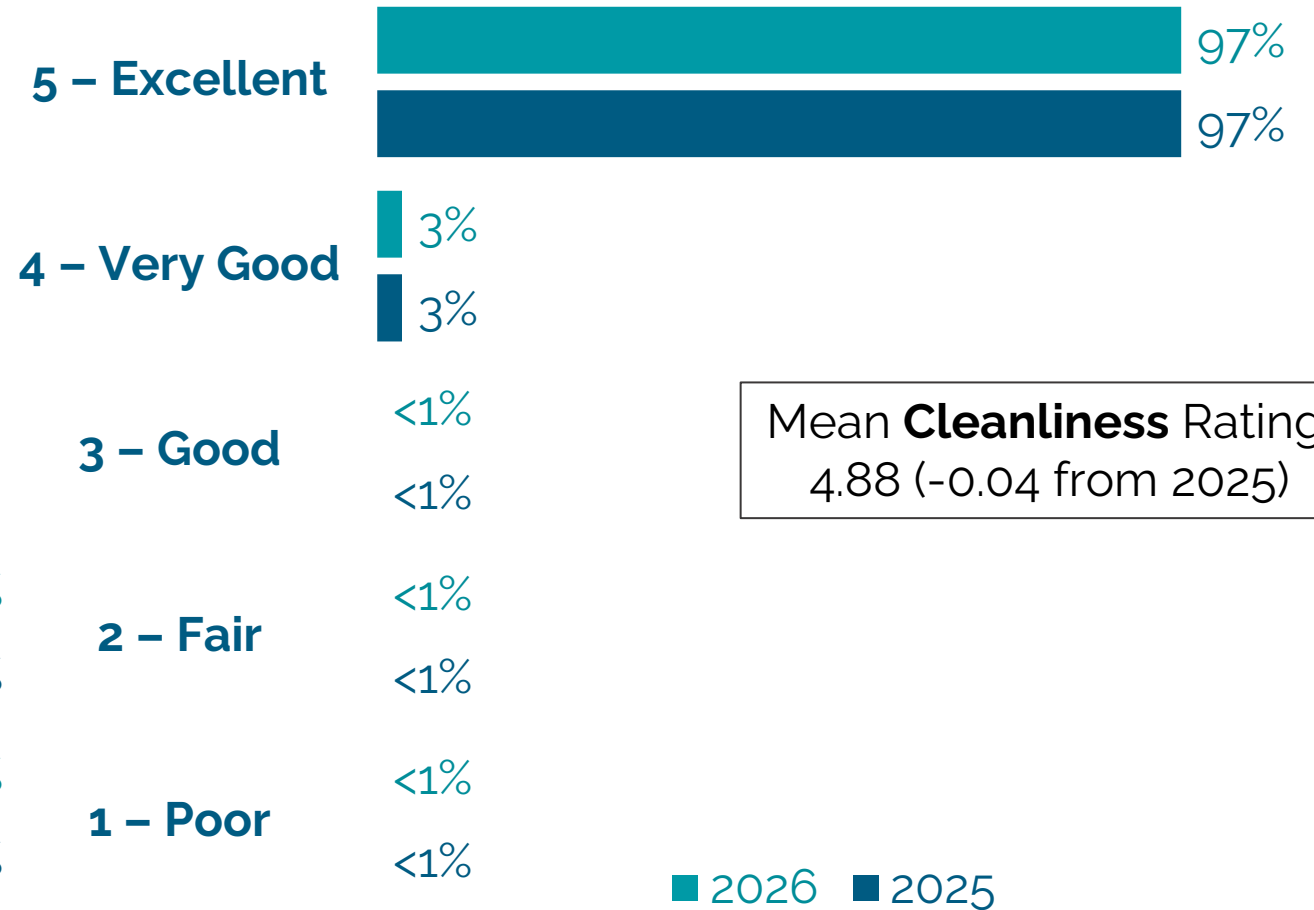
BEACH RATINGS

Overall Beach Rating



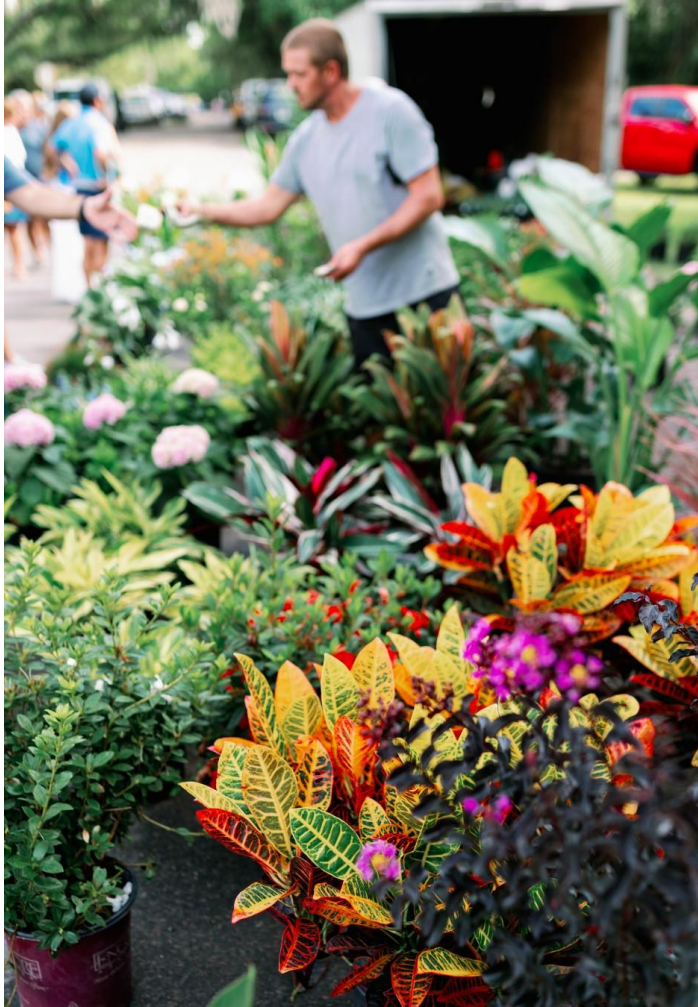
Mean **Overall** Rating:
4.7 (-0.1 from 2025)

Beach Cleanliness Rating



Mean **Cleanliness** Rating:
4.88 (-0.04 from 2025)

AREA DESCRIPTIONS*



- “Amelia Island feels like old Florida in the best way - peaceful, beautiful, and full of character.”
- “There’s so much to do here, but it still feels relaxed and never overcrowded.”
- “The beaches are gorgeous, the people are friendly, and the whole area has a really welcoming vibe.”
- “What I love most is that it works for any kind of trip - you can relax, explore, shop, dine, or just enjoy the scenery.”
- “It’s a rare place that has beautiful nature, great restaurants, and a true small-town feel all in one.”
- “You come for the beaches, but then you realize how much history, culture, and local flavor Amelia Island has too.”
- “It’s one of those places that feels special right away - calm, picturesque, and full of little things to discover.”

*Open-ended responses. Multiple responses permitted.

Amelia Island CVB

Visitor Tracking Study January – March 2026

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