

# Amelia Island CVB

Visitor Tracking Study  
July – September 2025

# METHODOLOGY



## Data Collection:

From July 1, 2025, to September 30, 2025, **509** visitors were interviewed in person at events, the beach, The Shops at The Omni, downtown, as well as online.

## Economic Impact:

Economic impact figures are based on all visitor types, including those staying in paid accommodations, unpaid accommodations, and day trippers.

*Note: The sampling error for a sample size of 509 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.*

# ECONOMIC IMPACT SUMMARY



# KEY PERFORMANCE INDICATORS Q4 FY25\*

A decrease in visitors this quarter combined with lower ADR and less discretionary spending led to a 7.6% decrease in overall visitor spend. However, an increase in the economic impact multiplier YOY softened the decrease in total economic impact to -1.7%.



217,200

**Total  
Visitors**

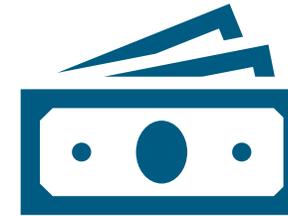
- 2.5% from FY24



198,410

**Room  
Nights\*\***

+ 2.6% from FY24



\$172,244,300

**Direct  
Spending**

- 7.6% from FY24



57.7%

**Occupancy**

+ 3.9% from FY24

# LODGING METRICS Q4 FY25

## COMBINED



57.7%

**Occupancy**

+ 3.9% from FY24



\$303.89

**Average Daily Rate**

- 4.2% from FY24



\$175.36

**Revenue Per Available Room**

- 0.4% from FY24

## HOTELS\*



64.0%

**Occupancy**

+ 5.0% from FY24



\$298.53

**Average Daily Rate**

+ 2.1% from FY24



\$190.92

**Revenue Per Available Room**

+ 7.3% from FY24

## VACATION RENTALS\*\*



47.1%

**Occupancy**

+ 0.9% from FY24



\$313.00

**Average Daily Rate**

- 12.6% from FY24



\$147.42

**Revenue Per Available Room**

- 11.8% from FY24

# VISITOR PROFILE SUMMARY



# VISITOR PROFILE Q4 FY25



**49**

Median Age

**37%**

First-Time Visitor

**\$152,330**

Median Household Income

**\$547**

Average Daily Travel Party Spend

**2.9**

Travel Party Size

**4.0**

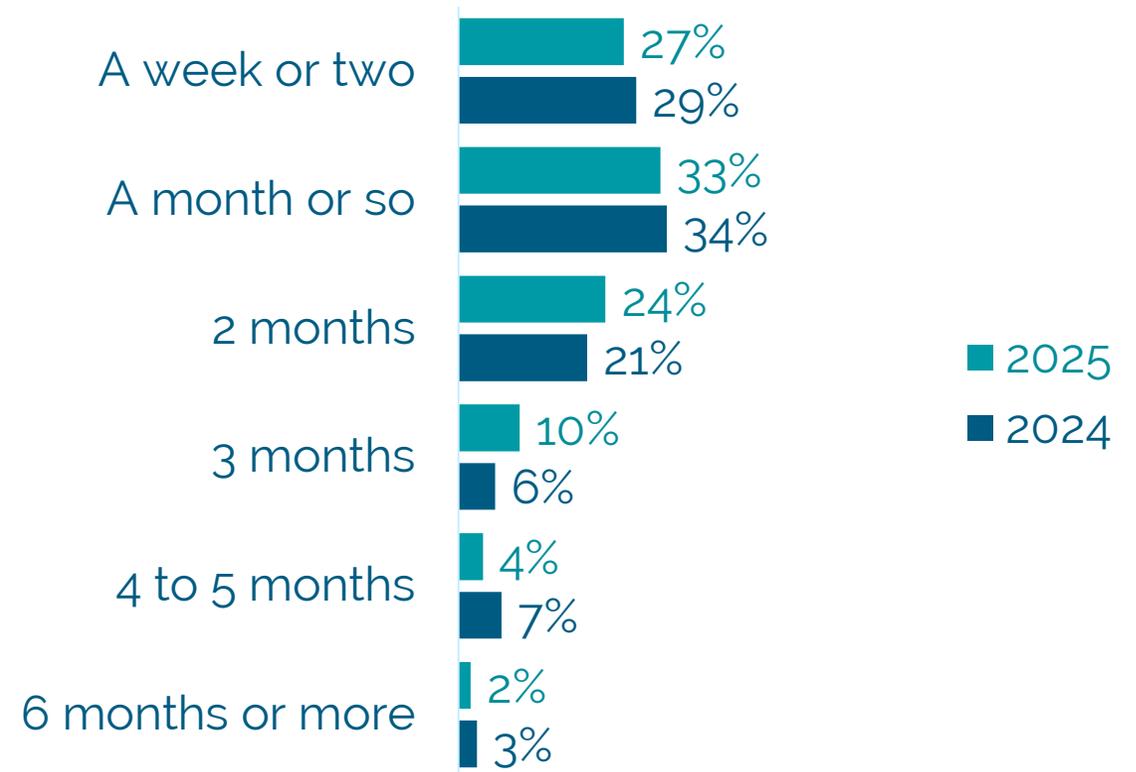
Length of Stay

# TRIP BOOKING CYCLE Q4 FY25\*

How far in advance did you book this trip to the area?

Average booking cycle: **45 days (-1 day from 2024)**

» Despite nationwide trends of shortening booking windows, Amelia Island's July-September leisure visitor booking window was only shorter by 1 day compared to 2024.



\*Based on visitors traveling for leisure.

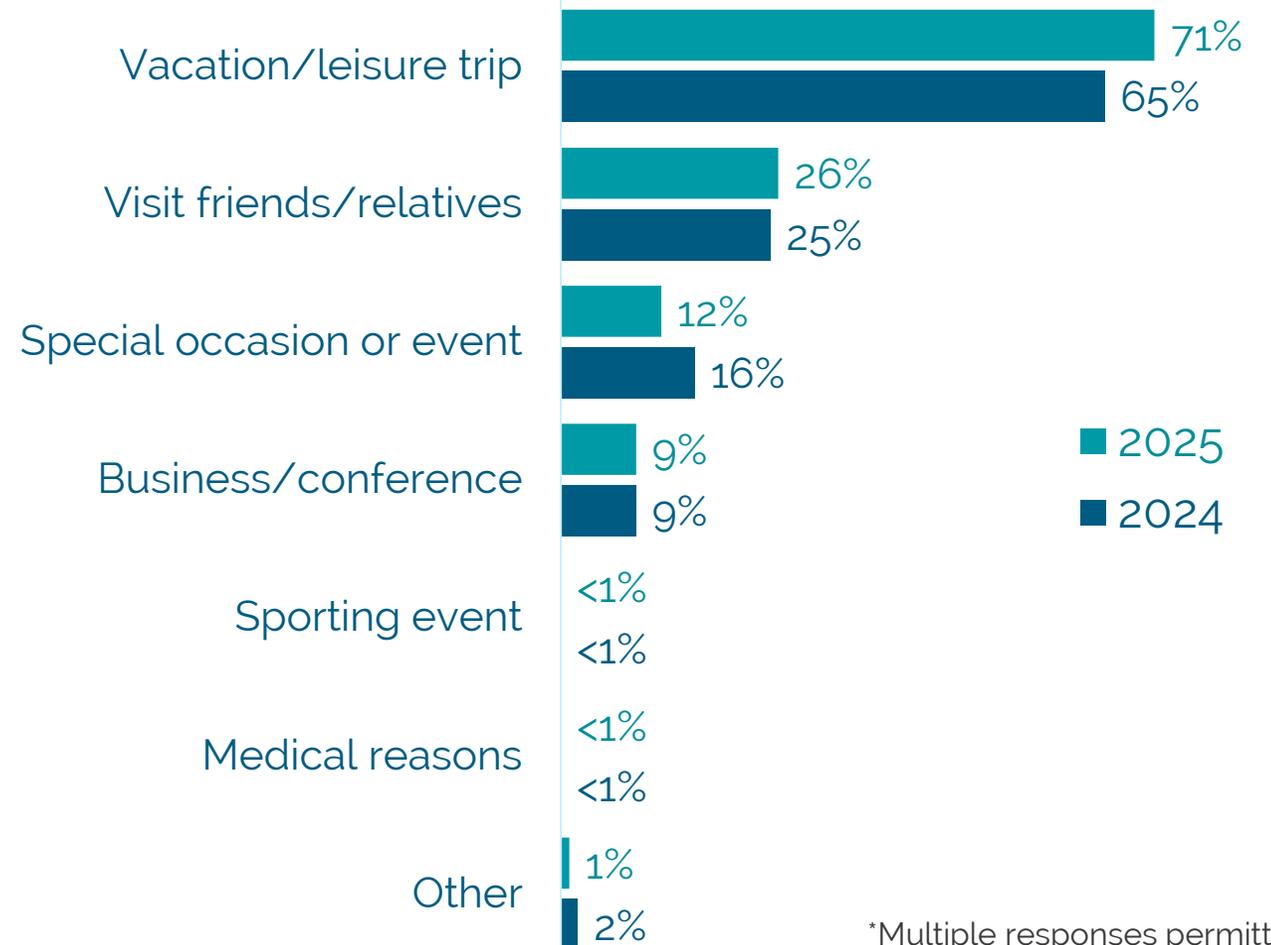
# MAIN REASONS FOR VISITING Q4 FY25\*

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

» Despite a nationwide decrease in leisure travel, 6% points more visitors indicated leisure as their primary reason for visiting Amelia Island compared to Q4 FY2024.

» This quarter continued a trend of more visitors coming to the area for its history (+5% points YOY)

» In line with the second year of Amelia Island Dining Month, more visitors also came for a foodie trip compared to Q4 2024 (+7% points)

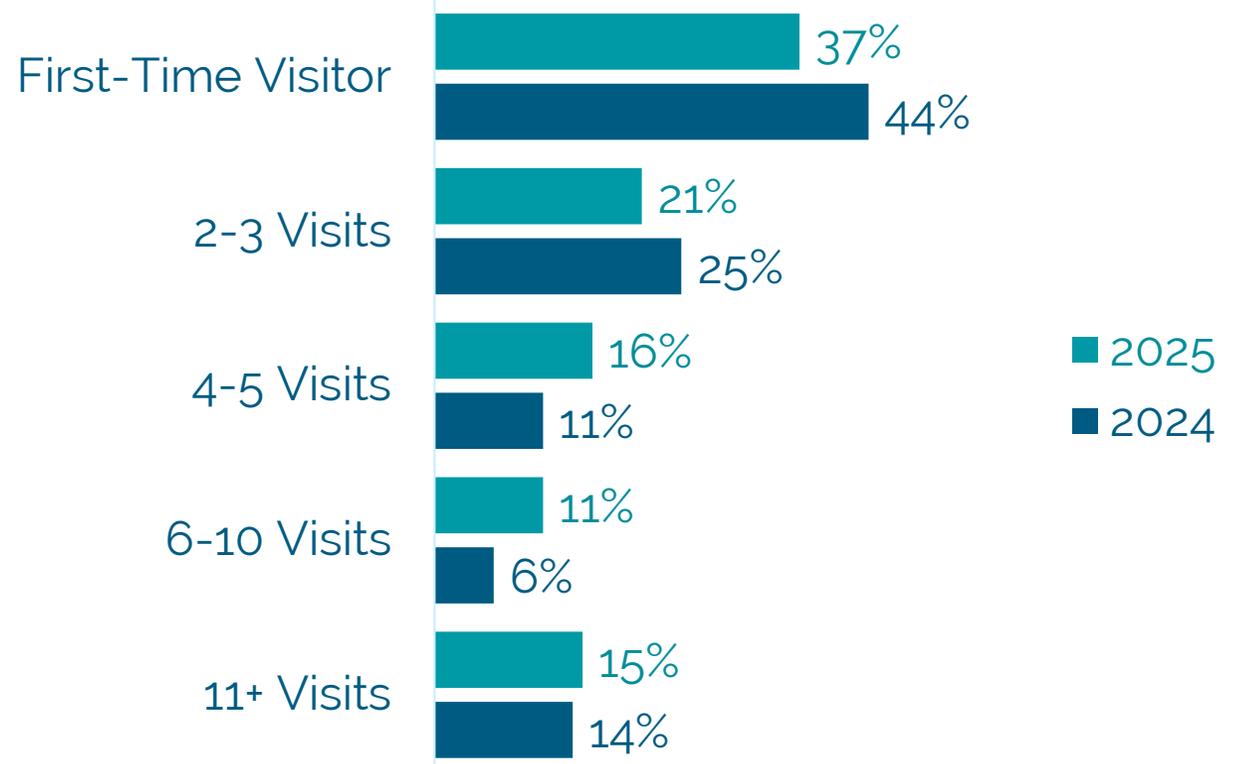


\*Multiple responses permitted.

# FIRST-TIME VISITORS Q4 FY25\*

Approximately how many times have you visited the Amelia Island area?

- » Amelia Island saw 7% points fewer first-time visitors compared to Q4 of 2024.
- » First-time visitors chose Amelia Island over other destinations for the following reasons:
  - » They wanted to go somewhere new
  - » They liked the smaller size compared to other beach towns
  - » They thought Amelia Island would have better beaches than other destinations
  - » Amelia Island was less expensive than other areas



\*Multiple responses permitted.

# ADVERTISING AND PROMOTION SOURCES Q4 FY25\*

Where did you see ads, promotions, or travel stories about the Amelia Island area?

» **11% points fewer visitors recalled seeing advertising for the Amelia Island area compared to Q4 2024. However, 9% points more of those who did see ads were influenced by them to visit the area.**

Advertising Source	2024	2025
Online article	15%	15%
Amelia Island's social media	15%	9%
Magazine article	15%	6%
Traveler reviews/blogs	7%	6%
Magazine ad	12%	5%
Travel/visitor guide	10%	5%
Ad on a website	8%	4%
Personal social media	7%	4%
Video streaming services	7%	2%
Podcast	2%	1%
Rental agency/other booking website	6%	1%
Deal-based promotion	1%	1%
AAA	3%	1%
Other	1%	1%

# TOP ORIGIN MARKETS Q4 FY25

## Top Origin Markets – All Visitors

Market	2024	2025
Jacksonville*	16%	20%
Atlanta	9%	8%
Orlando-Daytona Beach-Melbourne	4%	5%
Charlotte	4%	4%
Nashville	5%	3%
New York**	3%	3%
Savannah	2%	3%
Washington, DC-Hagerstown	2%	3%

## Top Origin Markets – Overnight Visitors

Market	2024	2025
Atlanta	10%	10%
Jacksonville*	10%	9%
Orlando-Daytona Beach-Melbourne	4%	5%
Charlotte	4%	4%
Nashville	6%	3%
New York	3%	3%
Savannah	2%	3%
Washington, DC-Hagerstown	2%	3%

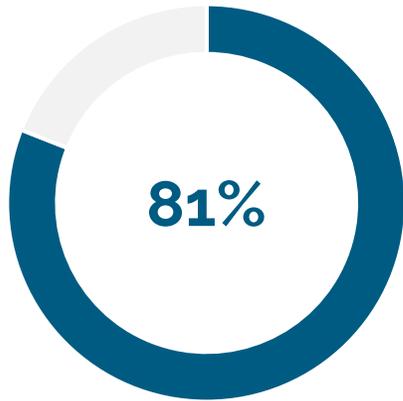
» **More visitors traveled to Amelia Island from the Jacksonville DMA compared to Q4 2024. However, more overnight visitors came from other areas and 1% point fewer from the Jacksonville DMA.**

» **Q4 tends to see more visitors traveling from the Southeast (outside of Florida) compared to other quarters.**

\*Includes Jacksonville, FL and Brunswick, GA.

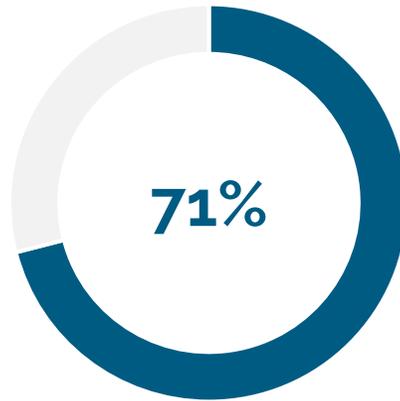
\*\*Includes parts of Connecticut, New Jersey, and Pennsylvania.

# SATISFACTION STATISTICS Q4 FY25



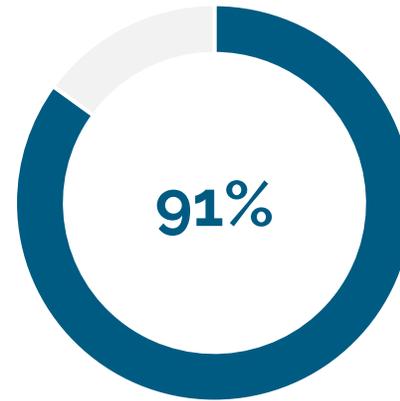
## VERY SATISFIED

81% of visitors reported being very satisfied with their trip experience.



## DEFINITELY RETURN

71% of visitors said they would definitely return to the area.



## DEFINITELY RECOMMEND

91% of visitors would definitely recommend the area to friends and family over other vacation areas (up 12% points from 2024).



## OVERALL BEACHES RATING

Visitors rated Amelia Island's beaches an average of 4.8 out of 5.

# VISITOR PROFILE INSIGHTS Q4 FY25

## Insights

Leisure visitor booking window largely stable YOY

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Leisure travel increased YOY, particularly history and foodie trips

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Fewer first-time visitors

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Fewer visitors recalled ads, but more of these were influenced by them

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More visitors traveled from within the Jacksonville DMA

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This quarter sees the highest percent of visitors from the Southeast

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More visitors would definitely recommend the area to friends/family

# STRAIGHT FROM YOUR VISITORS: Q4 FY25\*

Reasons for Choosing Amelia Island	Describing Amelia Island
"Great mix of beaches and things to do for the entire family."	"Wonderful small, quaint town. Truly Old Florida."
"Just the right size."	"Beautiful, chill, fun, and full of nice people."
"All the charm and history without all the traffic!"	"Great golf, lovely beaches, and fun restaurants."
"We liked the hotel prices and availability."	"Peaceful and safe, yet vibrant and alive."
"We came for Dining Month and because we'd never been!"	"Like several types of vacations rolled into one!"
"Word of mouth plus ads on TV convinced us to visit."	"A manageable size and reasonable prices."
"We saw it on a list of top beach destinations!"	"A great place for a conference – there's so much to do!"
"It's more upscale; nicer beaches and restaurants."	"It has maintained its quiet charm over the years."

# DETAILED FINDINGS



# VISITOR JOURNEY: ECONOMIC IMPACT



# TOURISM SNAPSHOT: METRICS

	July – September 2024	July – September 2025	% Δ
Visitors	222,700	217,200	- 2.5%
Visitor Days <sup>1</sup>	846,260	868,800	+ 2.7%
Direct Spending	\$186,373,100	\$172,244,300	- 7.6%
Economic Impact <sup>2</sup>	\$245,267,000	\$241,142,000	- 1.7%

	July – September 2024	July – September 2025	% Δ
Occupancy <sup>3</sup>	55.5%	57.7%	+ 3.9%
ADR <sup>3</sup>	\$317.17	\$303.89	- 4.2%
RevPAR <sup>3</sup>	\$176.09	\$175.36	- 0.4%
Room Nights <sup>3</sup>	193,460	198,410	+ 2.6%

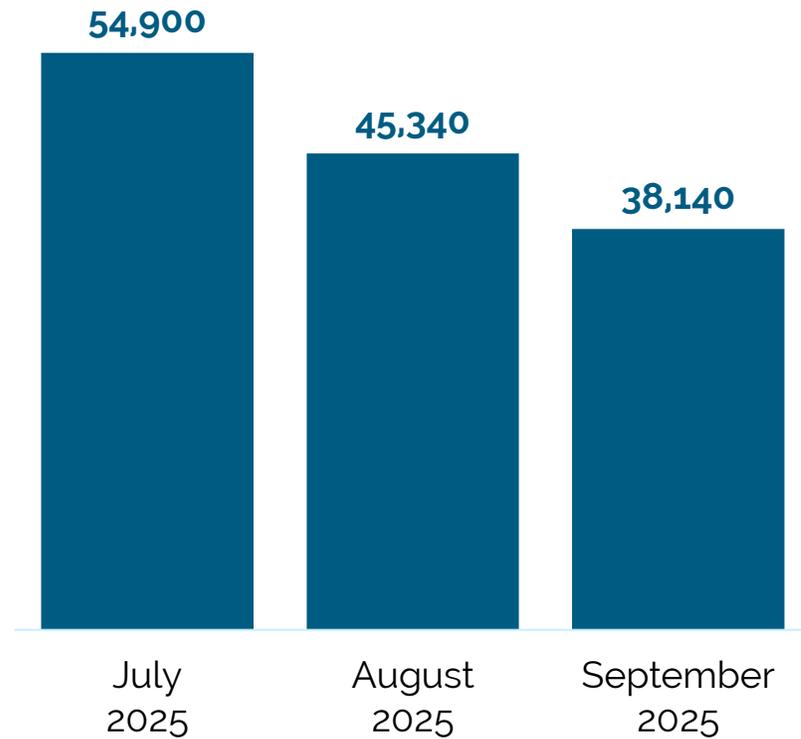
<sup>1</sup>Visitor days increased despite a decrease in visitor number because length of stay increased.

<sup>2</sup>Economic impact decreased less than spending because the IMPLAN multiplier for FY2025 updated to 1.40 from 1.32 in FY2024.

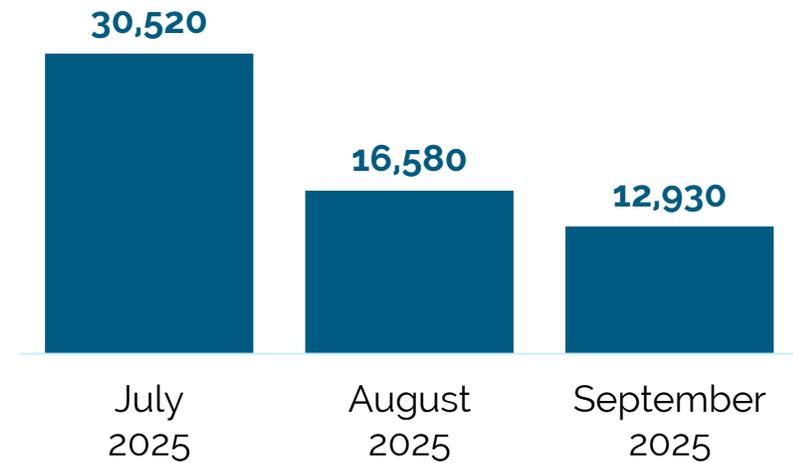
<sup>3</sup>Sources: Key Data, Smith Travel Research, Florida Department of Business and Professional Regulation.

# MONTHLY ROOM NIGHTS\*

## Hotel Room Nights



## Vacation Rental Room Nights



# MONTHLY VISITOR COUNTS

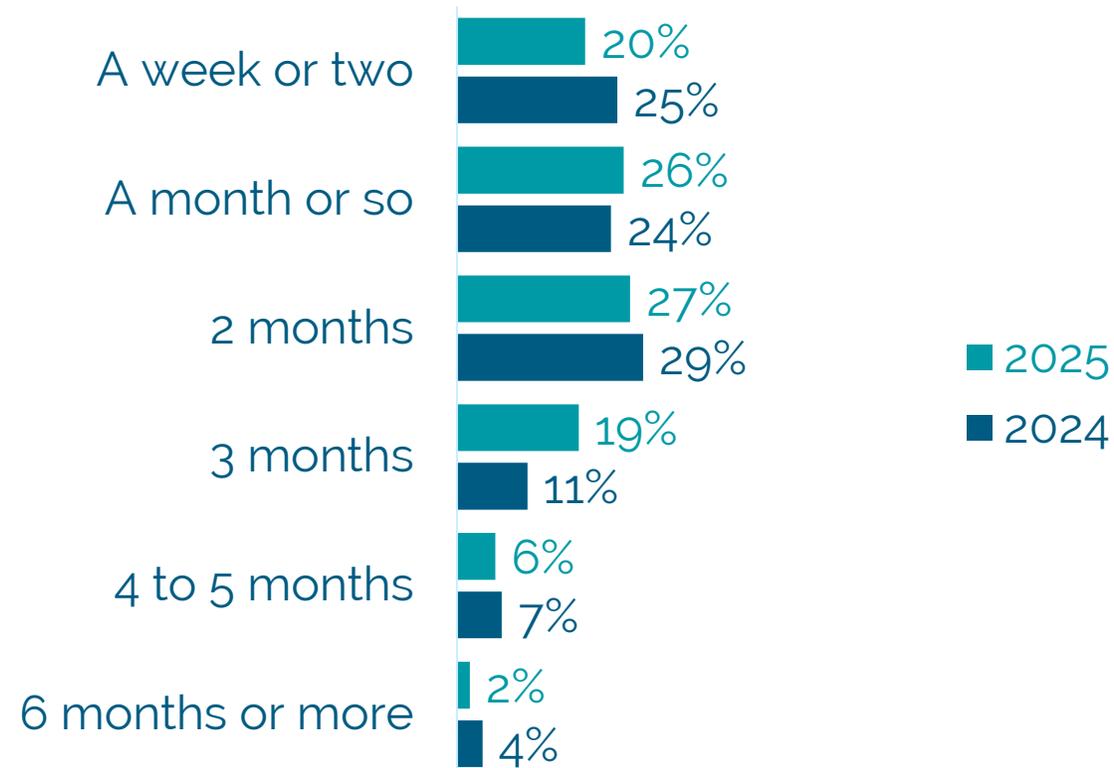
Accommodation Type	July Visitors	August Visitors	September Visitors
Hotel/motel/resort	40,910	33,800	29,390
Vacation rental	17,360	9,740	7,800
Non-paid accommodations*	16,230	13,410	11,660
Day tripper	14,500	11,980	10,420
<b>Total</b>	<b>89,000</b>	<b>68,930</b>	<b>59,270</b>

# VISITOR JOURNEY: PRE-VISIT



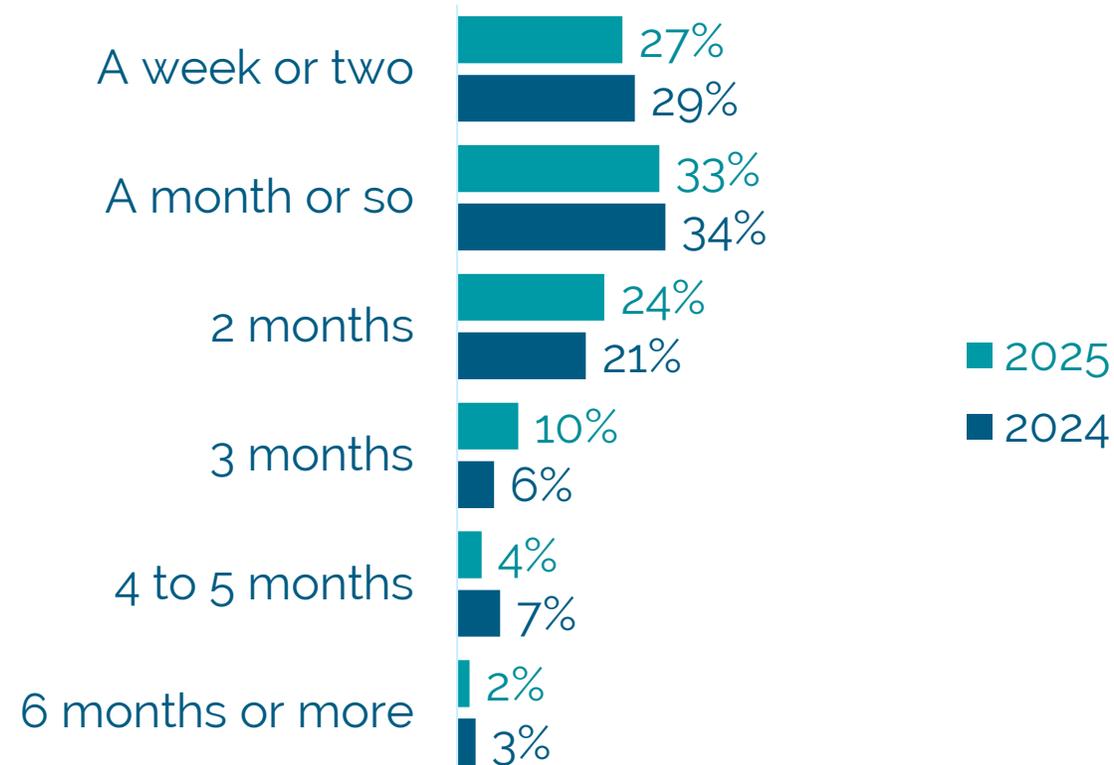
# TRIP PLANNING CYCLE\*

Average planning cycle: **55 days**  
(-1 day from 2024)



# TRIP BOOKING CYCLE\*

Average booking cycle: **45 days**  
(-1 day from 2024)

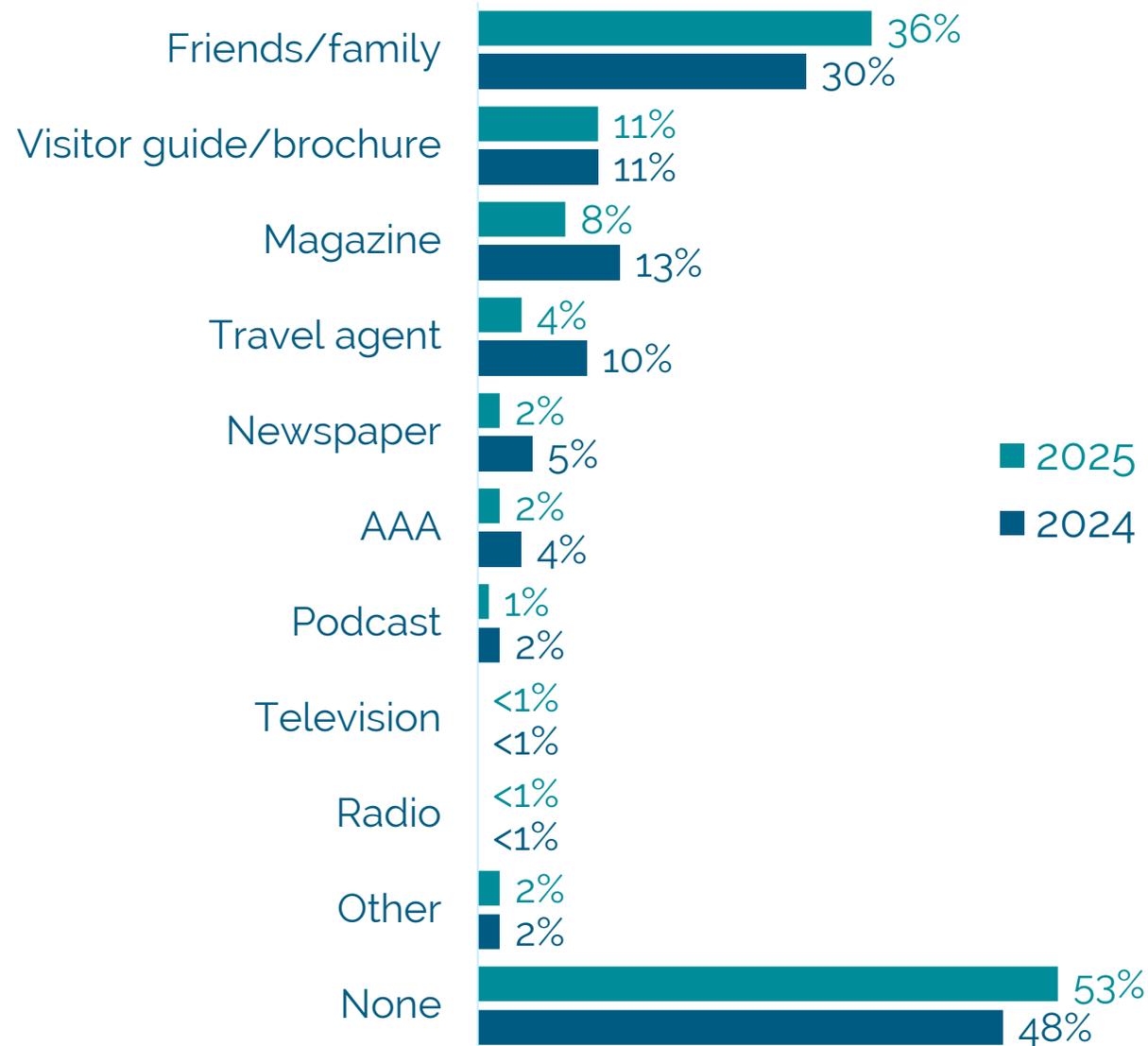


# ONLINE TRIP PLANNING SOURCES\*

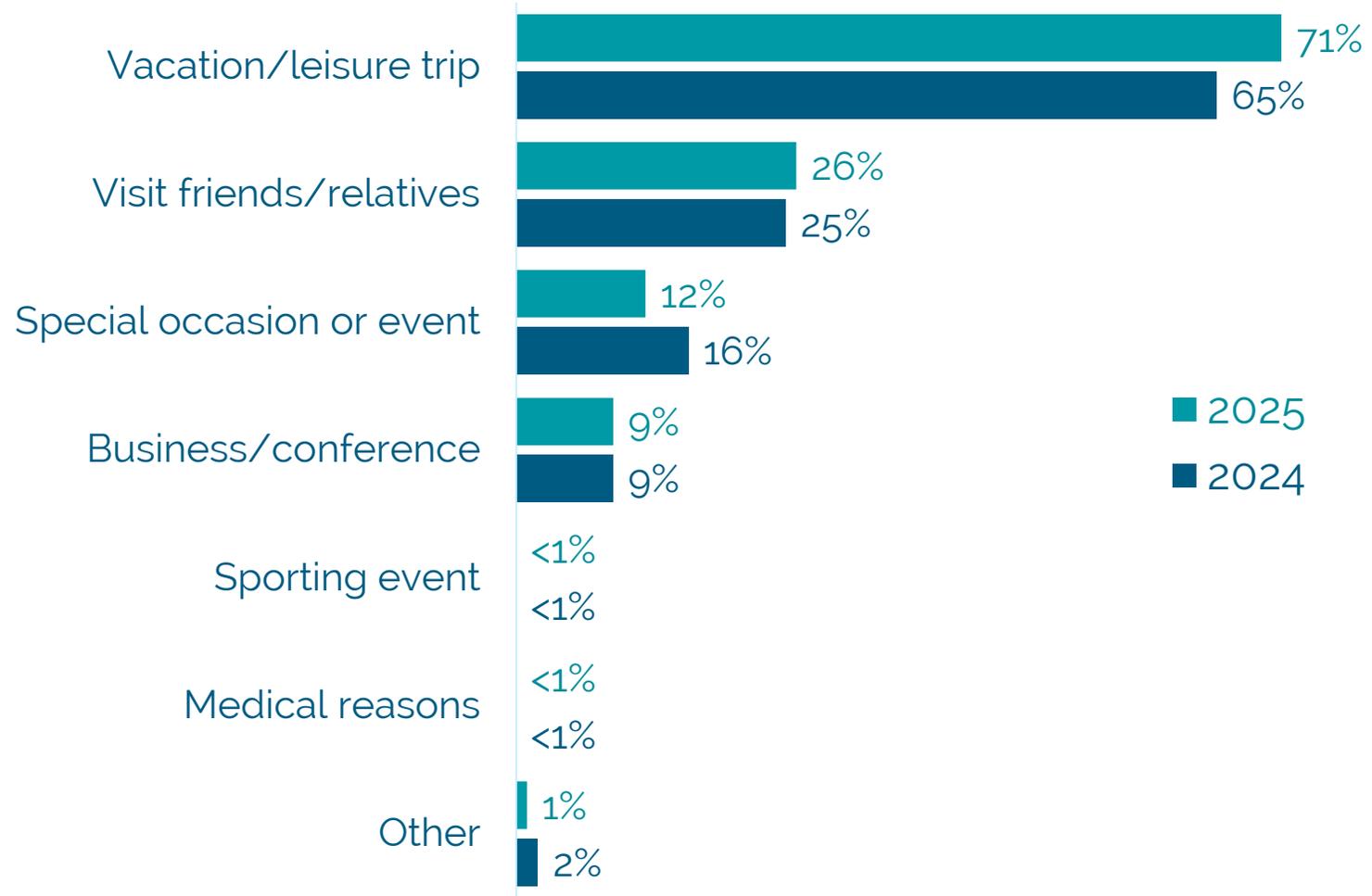
Online Planning Source	2024	2025
Hotel websites/apps	33%	30%
Online travel agency	12%	29%
Review website/app	16%	28%
Amelia Island social media	24%	24%
Airbnb, Vrbo, etc.	15%	17%
Personal social media	13%	11%
Online travel reviews, blogs, stories	14%	11%
Restaurant websites/apps	4%	9%
AmeliaIsland.com	15%	7%
Airline websites/apps	9%	4%
ChatGPT or other AI program	<1%	4%
Mapping websites	1%	4%
Amelia Island mobile app	5%	3%
Amelia Island rental companies	10%	3%
Video streaming services	1%	2%
Rental car websites/apps	1%	1%
Music streaming services	<1%	<1%
Accessibility travel resource sites	<1%	<1%
Other	1%	1%
None	28%	33%

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

# OTHER TRIP PLANNING SOURCES\*



# REASONS FOR VISITING\*



# DETAILED REASONS FOR VISITING\*

Main Reasons for Visiting	2024	2025
Beach trip	55%	59%
History	8%	13%
Shopping	11%	13%
Foodie/culinary	4%	11%
Girls/guys trip	8%	6%
Nature, bird watching, eco tours, etc.	10%	6%
Water sports	10%	5%
Company/government business	4%	5%
Biking, hiking, running, etc.	10%	4%
Wedding/honeymoon	7%	4%
Conference/convention/trade show	5%	4%
Birthday/anniversary	5%	3%
Reunion	3%	2%
Golf or tennis	3%	1%
Art galleries, museums, cultural events	1%	1%
Breweries/distilleries	1%	1%
Sporting event	<1%	1%
Festival	<1%	<1%
Performing arts	<1%	<1%
Concert	<1%	<1%

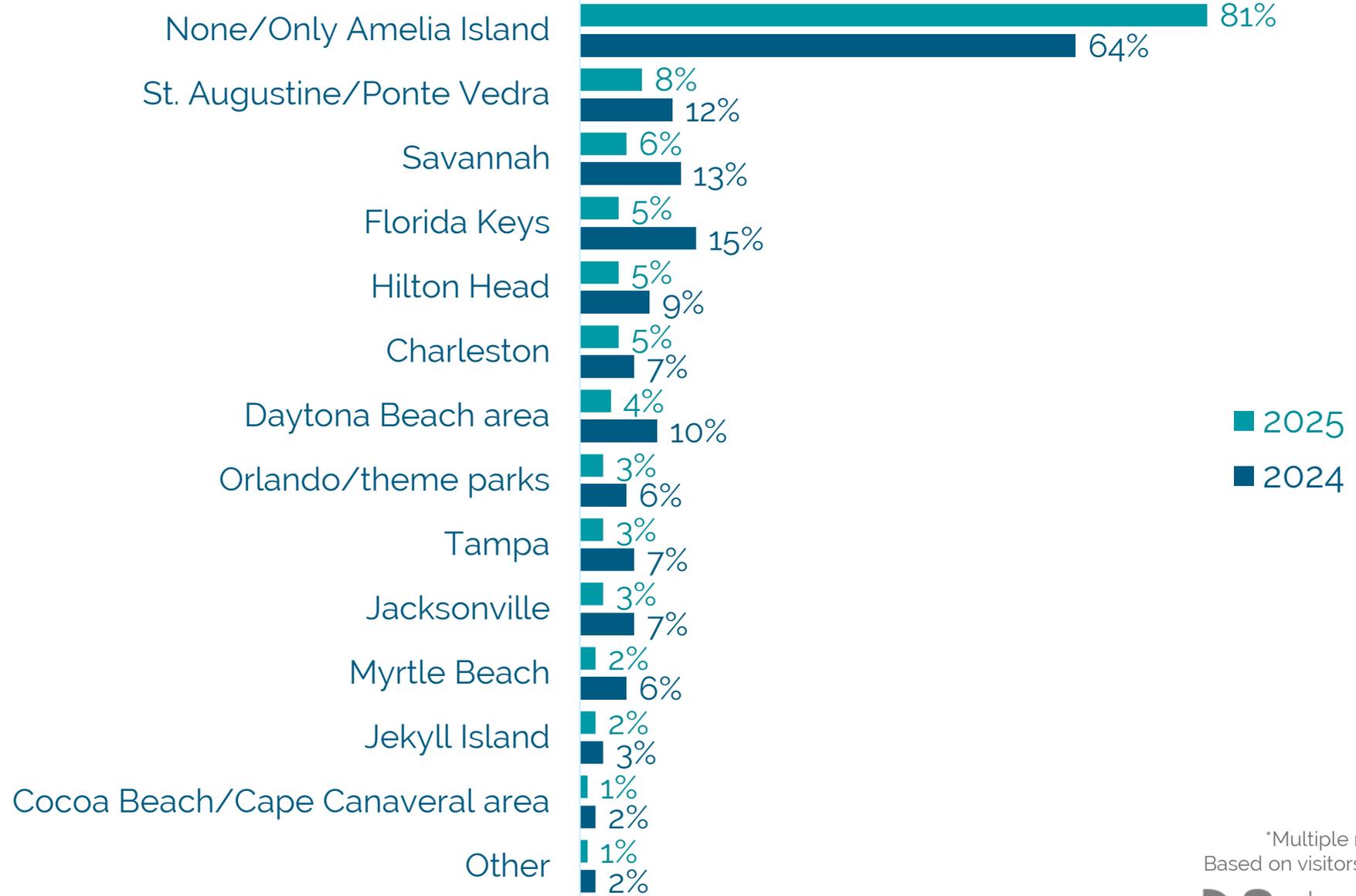
\*Multiple responses permitted.  
Based on all visitors traveling for leisure.

# OPEN-ENDED REASONS FOR VISITING\*



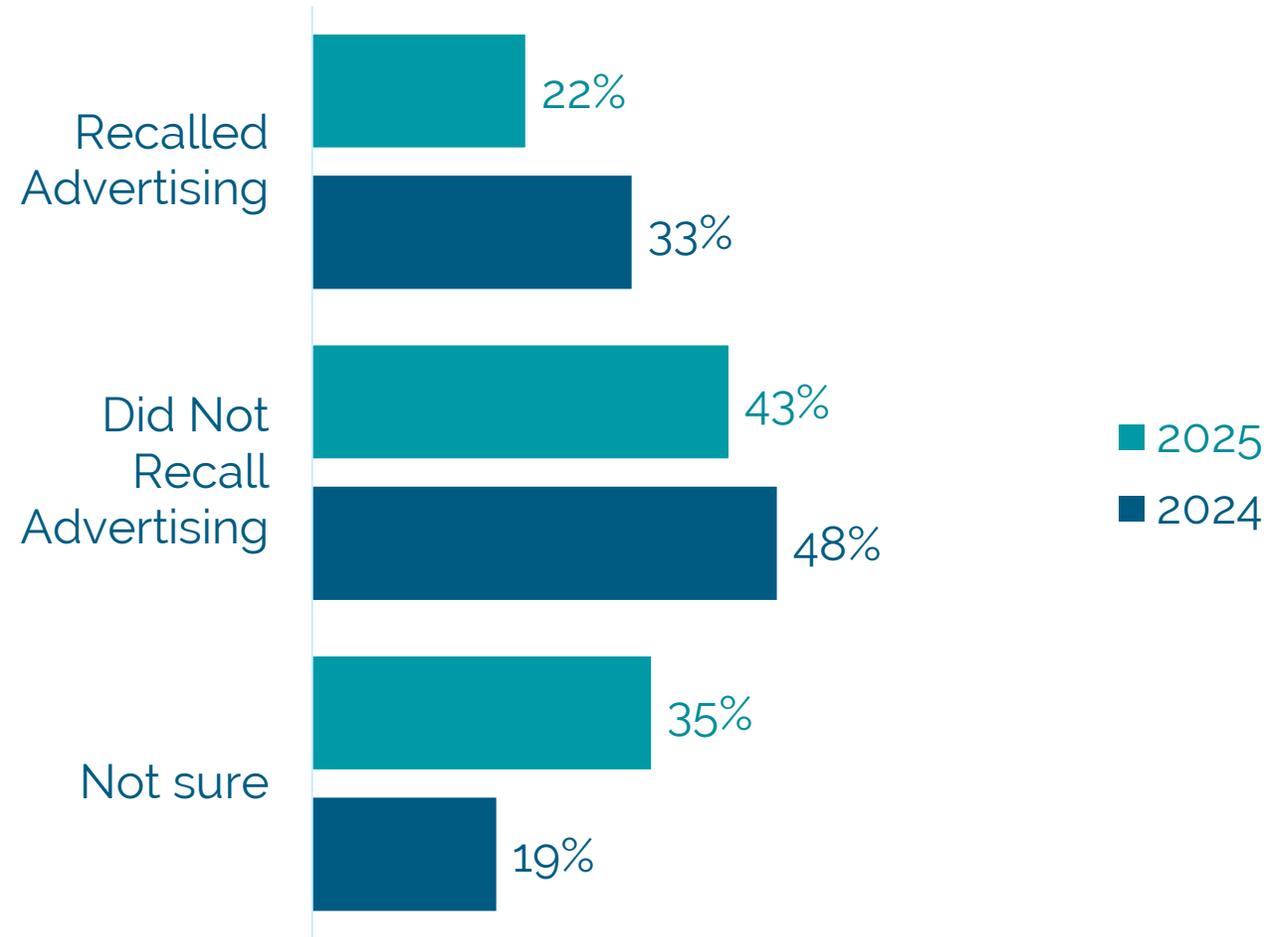
- “Great mix of beaches and things to do for the entire family.”
- “Just the right size.”
- “All the charm and history without all the traffic!”
- “We liked the hotel prices and availability.”
- “We came for Dining Month and because we’d never been!”
- “Word of mouth plus ads on TV convinced us to visit.”
- “We saw it on a list of top beach destinations!”
- “It’s more upscale; nicer beaches and restaurants.”

# OTHER DESTINATIONS CONSIDERED\*



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

# ADVERTISING RECALL\*



# ADVERTISING SOURCES\*

Advertisements influenced **12%** of **all leisure visitors** to visit the Amelia Island area (**-3% points from 2024**).

Advertising Source	2024	2025
Online article	15%	15%
Amelia Island's social media	15%	9%
Magazine article	15%	6%
Traveler reviews/blogs	7%	6%
Magazine ad	12%	5%
Travel/visitor guide	10%	5%
Ad on a website	8%	4%
Personal social media	7%	4%
Video streaming services	7%	2%
Podcast	2%	1%
Rental agency/other booking website	6%	1%
Deal-based promotion	1%	1%
AAA	3%	1%
Billboard	<1%	<1%
Television	1%	<1%
Music streaming services	<1%	<1%
Radio	<1%	<1%
Newspaper	<1%	<1%
Weather app	<1%	<1%
Other	1%	1%

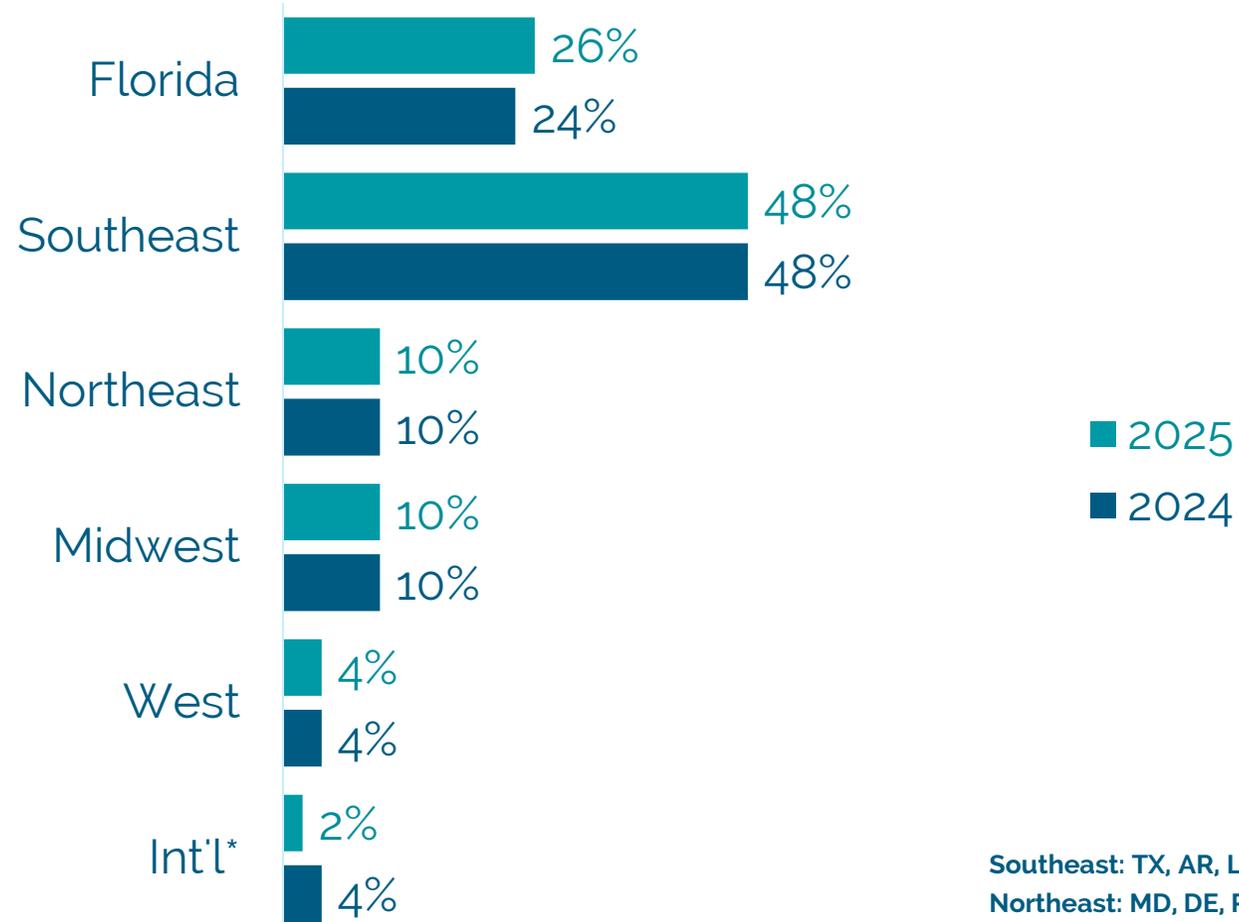
\*Multiple responses permitted.  
Based on all visitors traveling for leisure.



# 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 (1%; -1% point from 2024).

# TOP ORIGIN STATES

State	2024	2025
Florida	24%	26%
Georgia	22%	23%
North Carolina	5%	6%
South Carolina	5%	6%
Tennessee	5%	4%
Ohio	3%	3%
Maryland	2%	2%
Massachusetts	2%	2%
Mississippi	4%	2%
New Jersey	2%	2%
New York	1%	2%
Pennsylvania	1%	2%
Texas	2%	2%
Virginia	1%	2%



# TOP ORIGIN MARKETS

## Top Origin Markets – All Visitors

Market	2024	2025
Jacksonville*	16%	20%
Atlanta	9%	8%
Orlando-Daytona Beach-Melbourne	4%	5%
Charlotte	4%	4%
Nashville	5%	3%
New York**	3%	3%
Savannah	2%	3%
Washington, DC-Hagerstown	2%	3%
Boston	2%	2%
Columbia, SC	1%	2%
Greenville-Spartanburg-Asheville	1%	2%
Tallahassee-Thomasville	3%	2%
Tampa-St. Petersburg	3%	2%
West Palm Beach-Ft. Pierce	2%	2%

## Top Origin Markets – Overnight Visitors

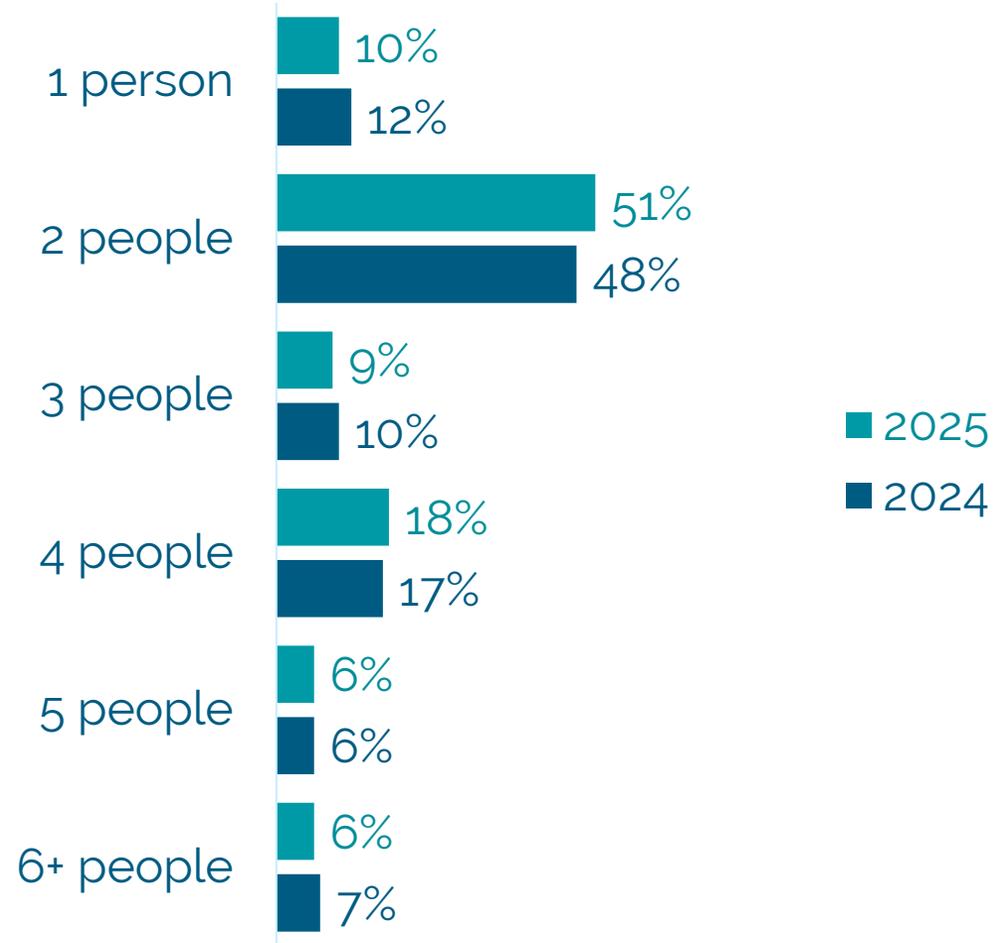
Market	2024	2025
Atlanta	10%	10%
Jacksonville*	10%	9%
Orlando-Daytona Beach-Melbourne	4%	5%
Charlotte	4%	4%
Nashville	6%	3%
New York**	3%	3%
Savannah	2%	3%
Washington, DC-Hagerstown	2%	3%
Boston	3%	2%
Columbia, SC	2%	2%
Greenville-Spartanburg-Asheville	1%	2%
Philadelphia	2%	2%
Tallahassee-Thomasville	3%	2%
Tampa-St. Petersburg	3%	2%
West Palm Beach-Ft. Pierce	2%	2%

\*Includes Jacksonville, FL and Brunswick, GA.

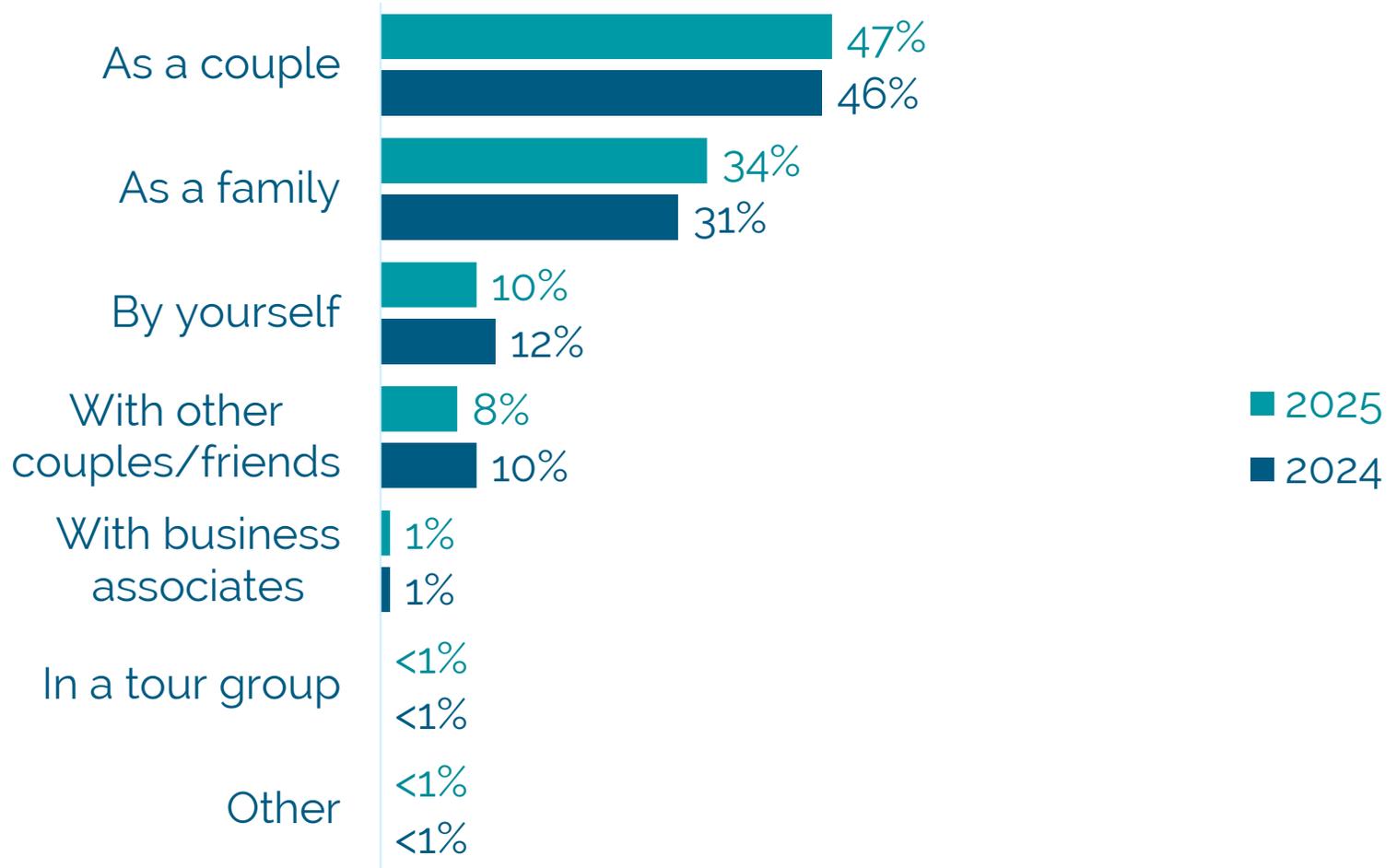
\*\*Includes parts of Connecticut, New Jersey, and Pennsylvania.

# TRAVEL PARTY SIZE

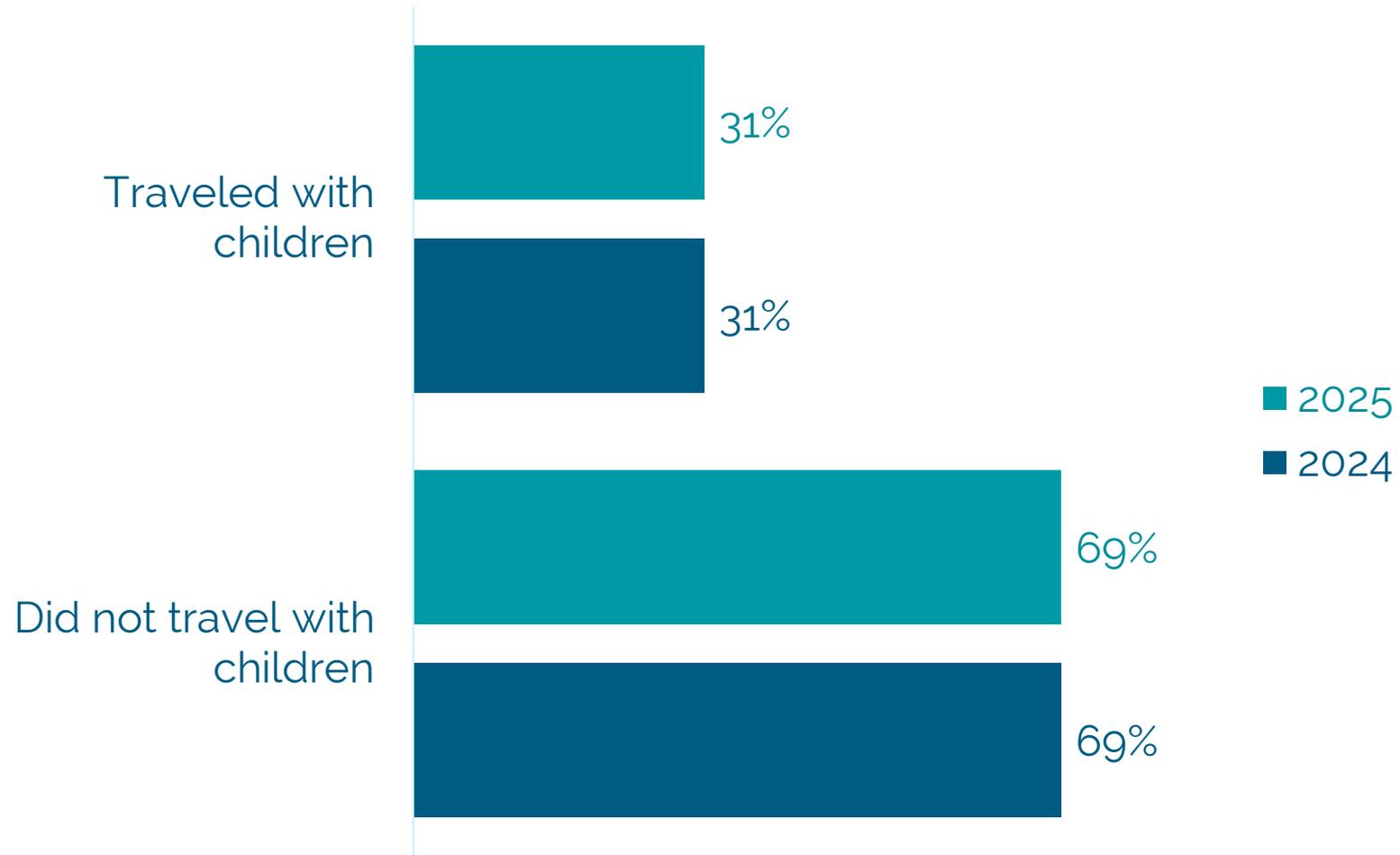
Average travel party size: **2.9**  
(+0.1 from 2024)



# TRAVEL PARTY TYPE

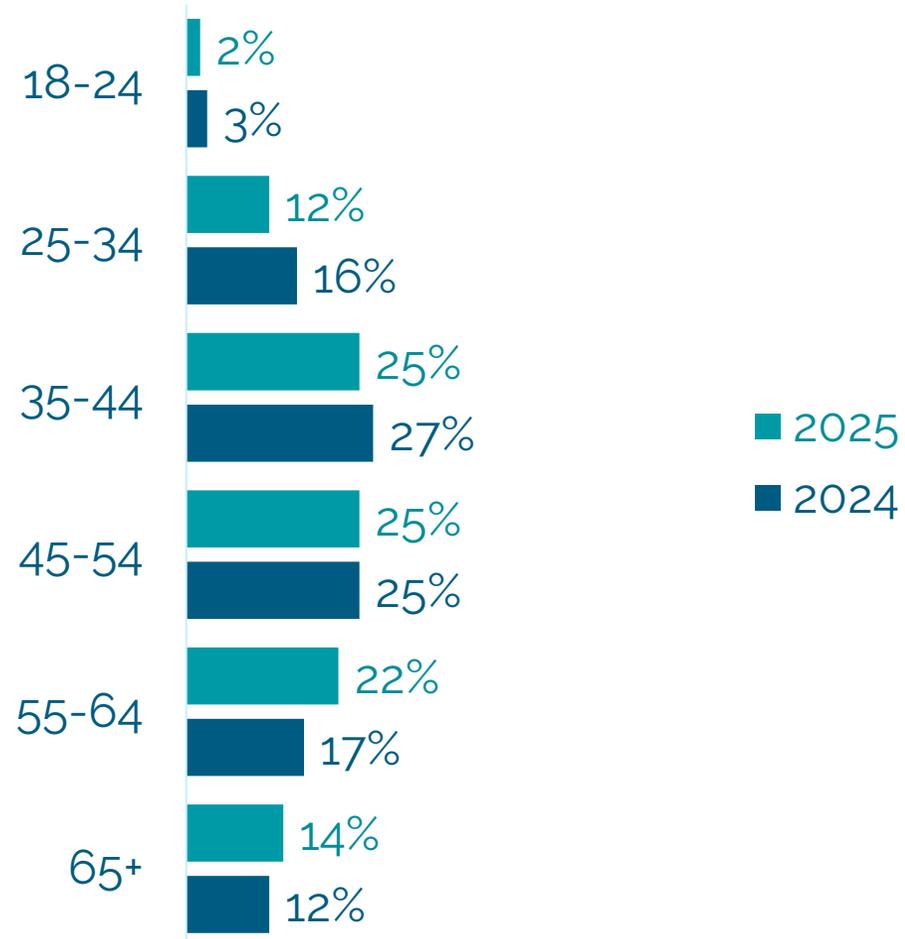


# TRAVELED WITH CHILDREN



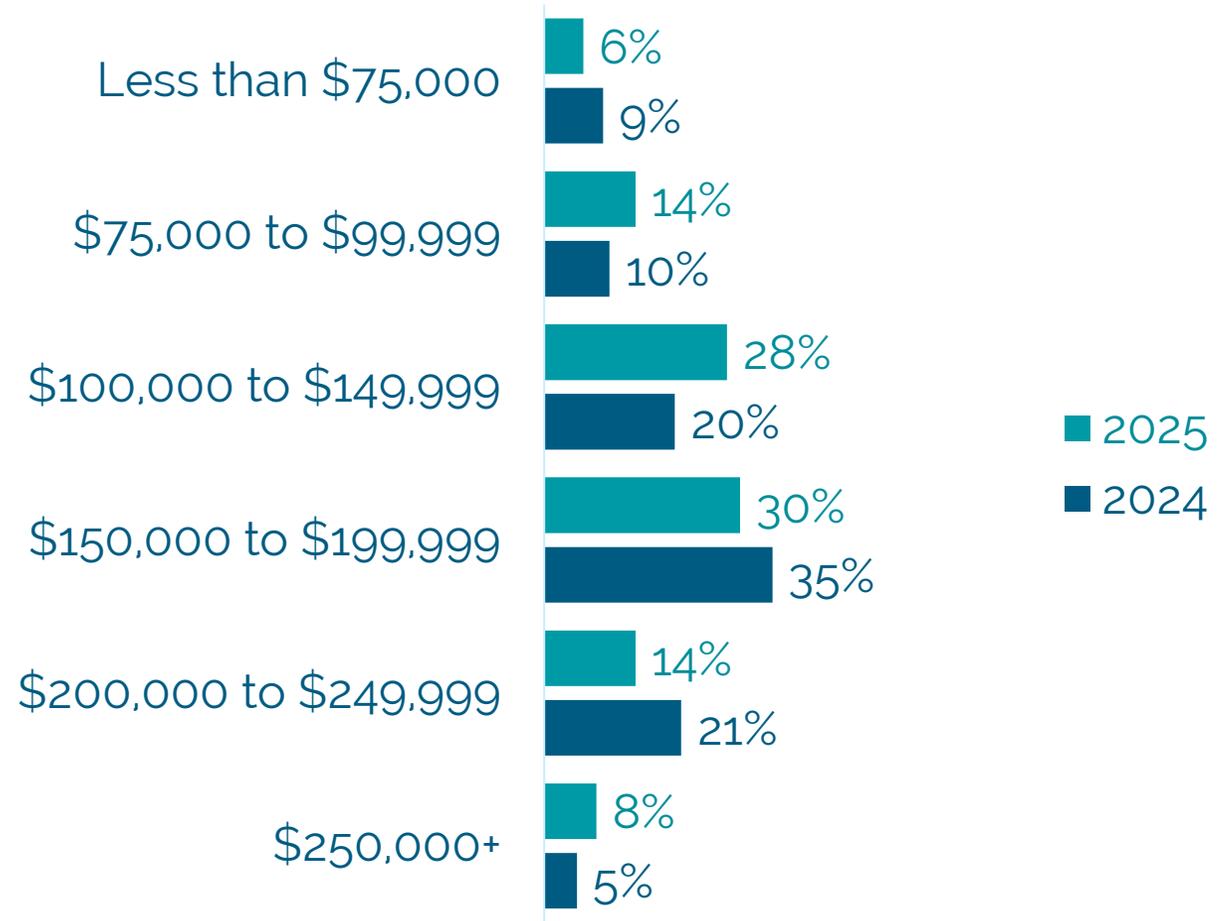
# AGE

Median age: **49**  
(+2 years from 2024)

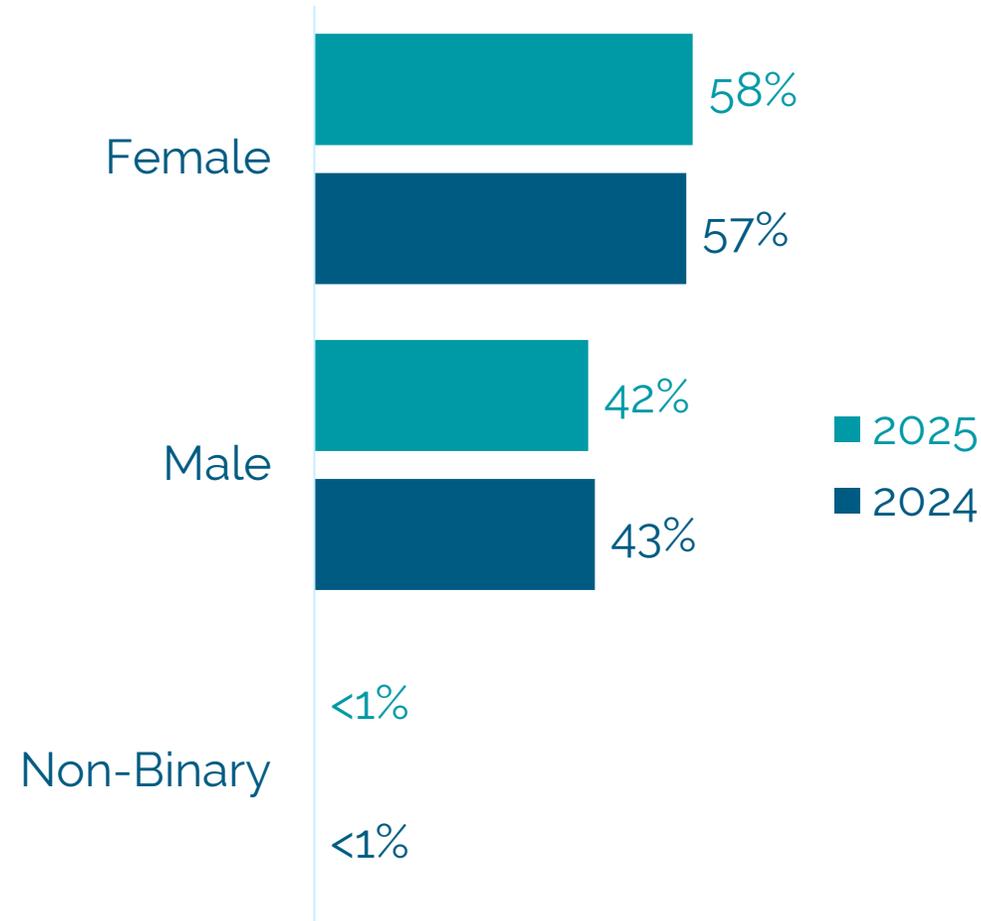


# HOUSEHOLD INCOME

Median household income: **\$152,330**  
(**-\$12,370 from 2024**)

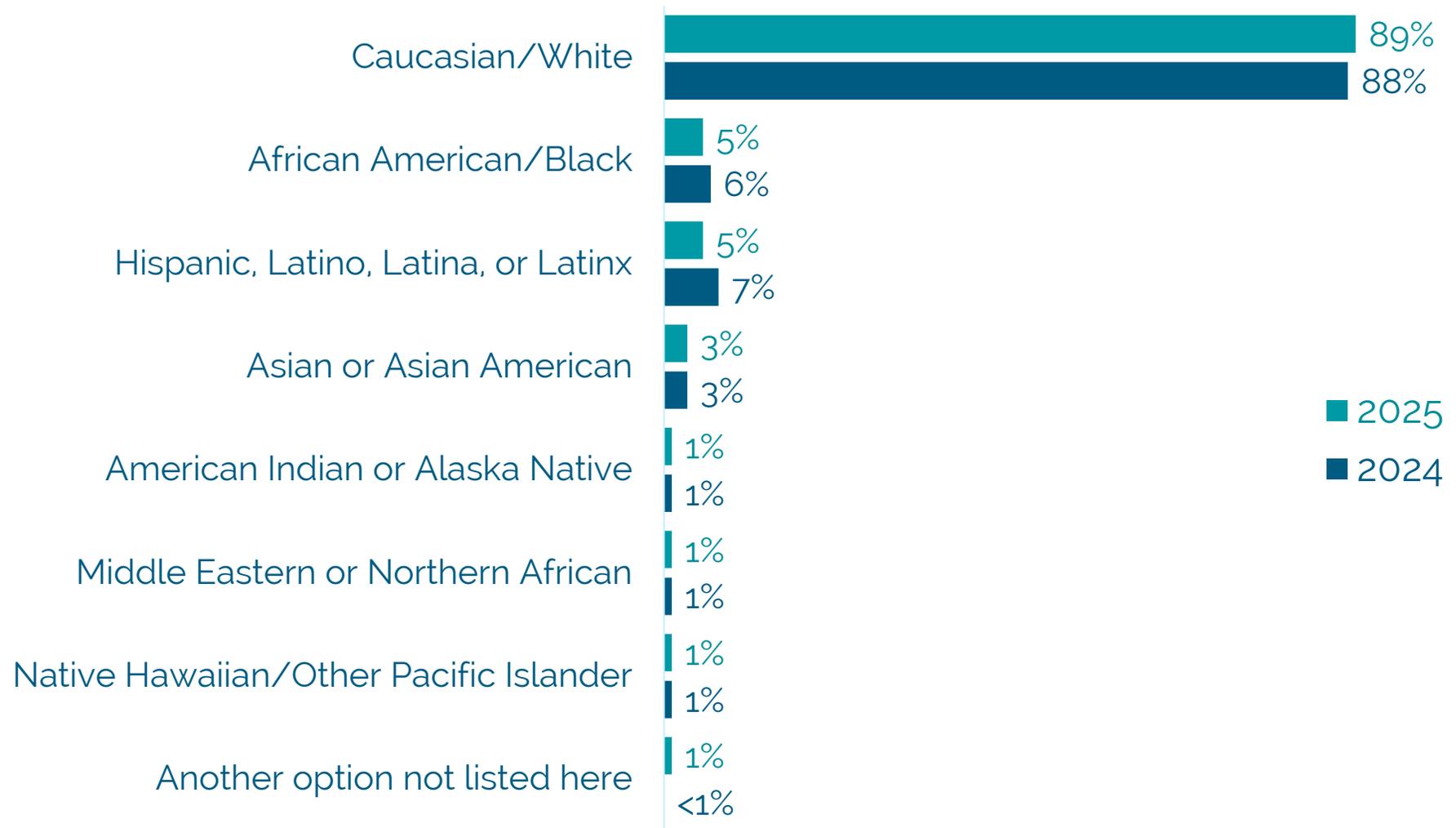


# GENDER\*



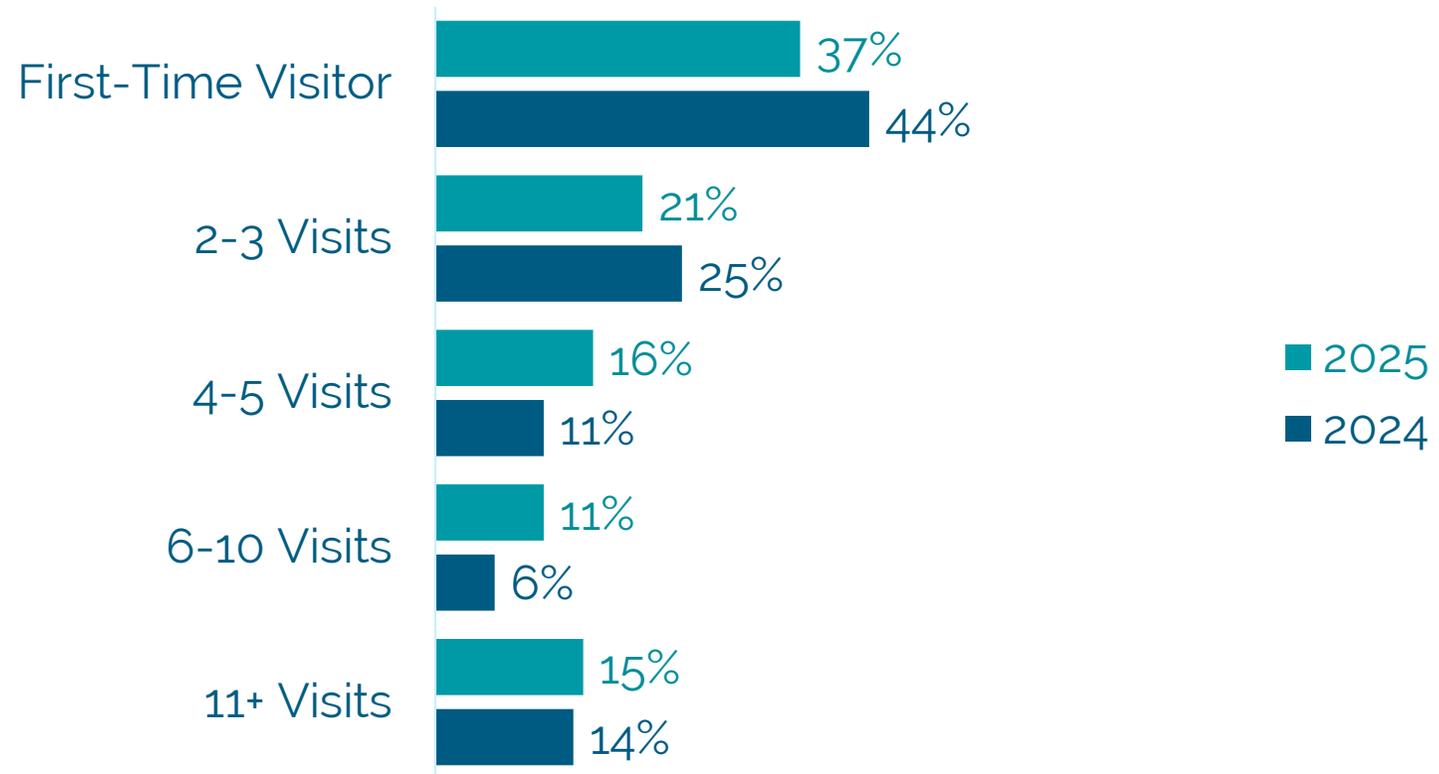
\*Gender of member of travel party interviewed. May be influenced by visitors' willingness to complete a survey.

# RACE\*



■ 2025  
■ 2024

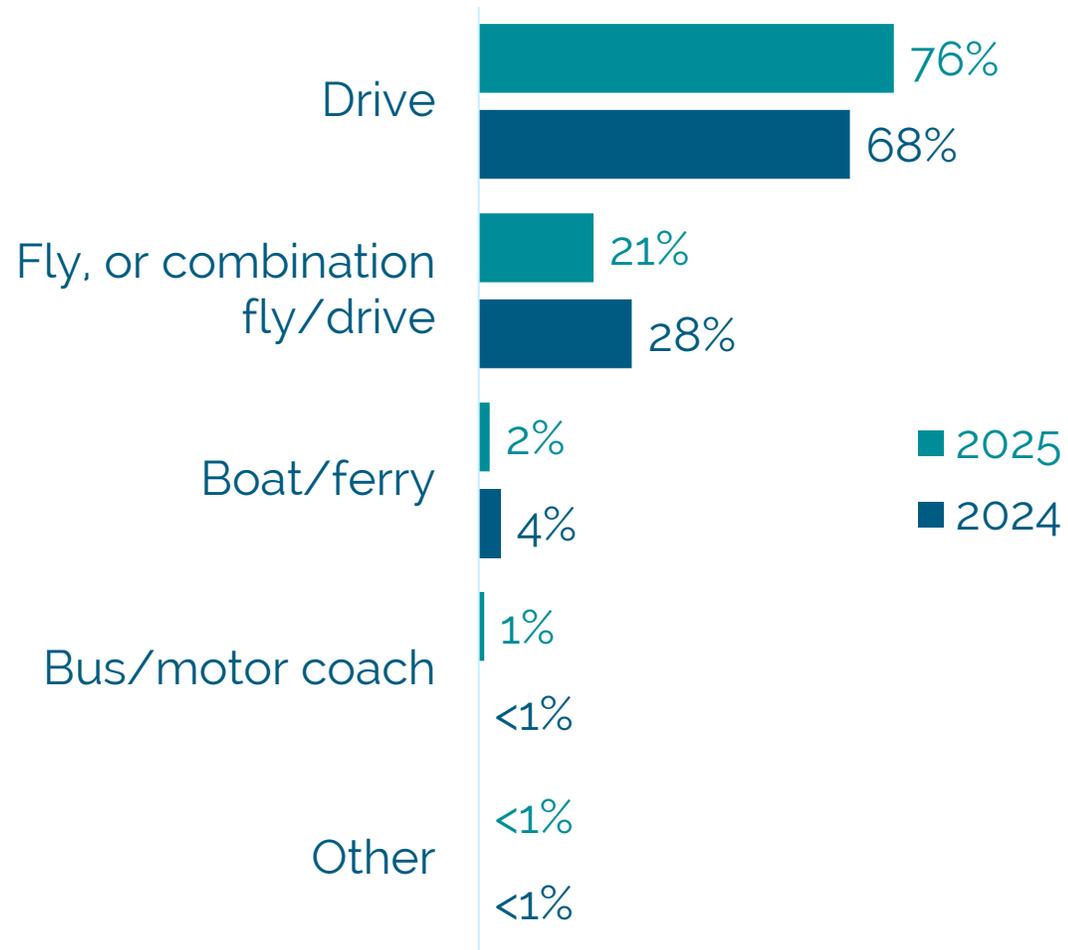
# NEW & RETURNING VISITORS



# VISITOR JOURNEY: TRIP EXPERIENCE

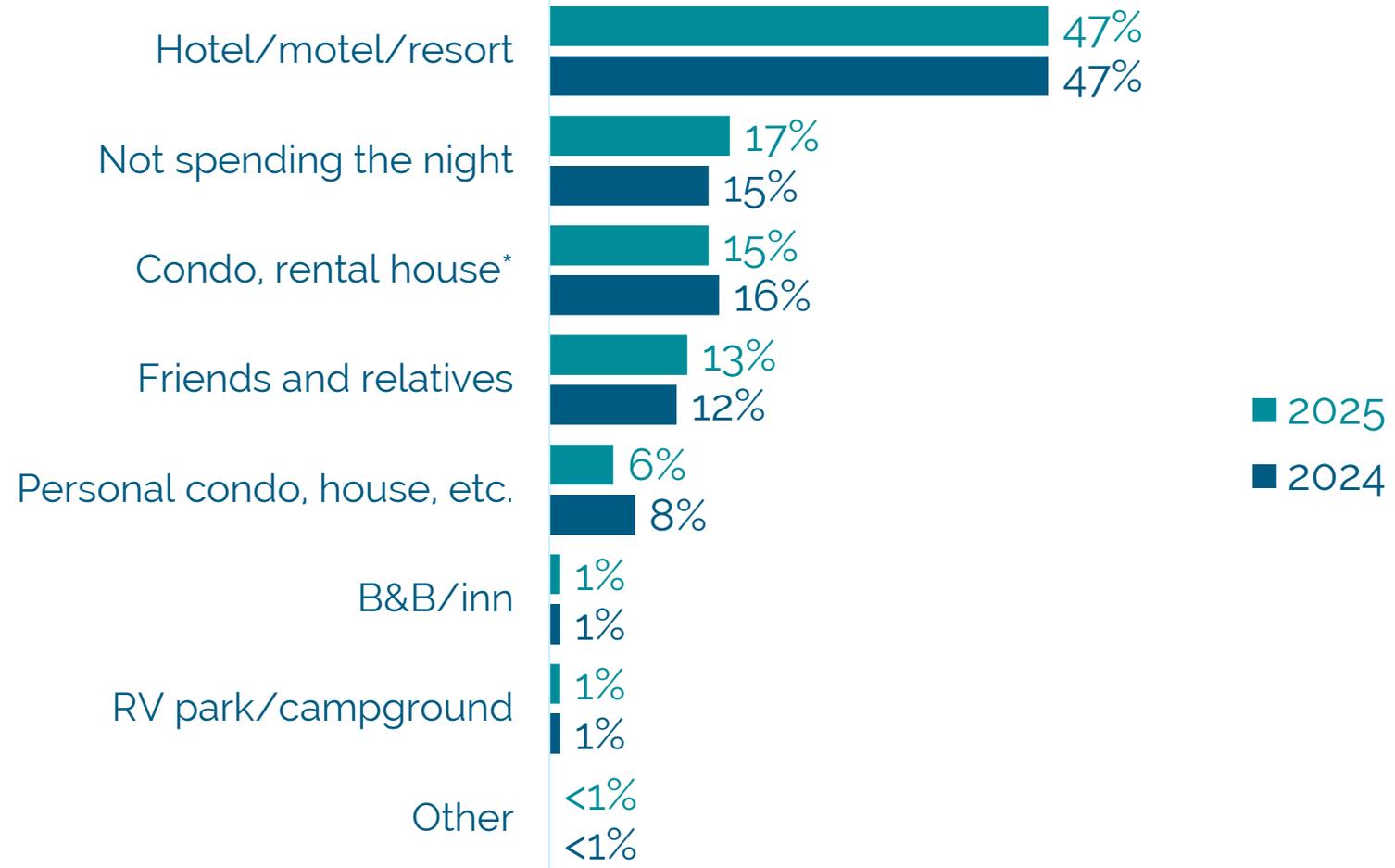


# TRANSPORTATION



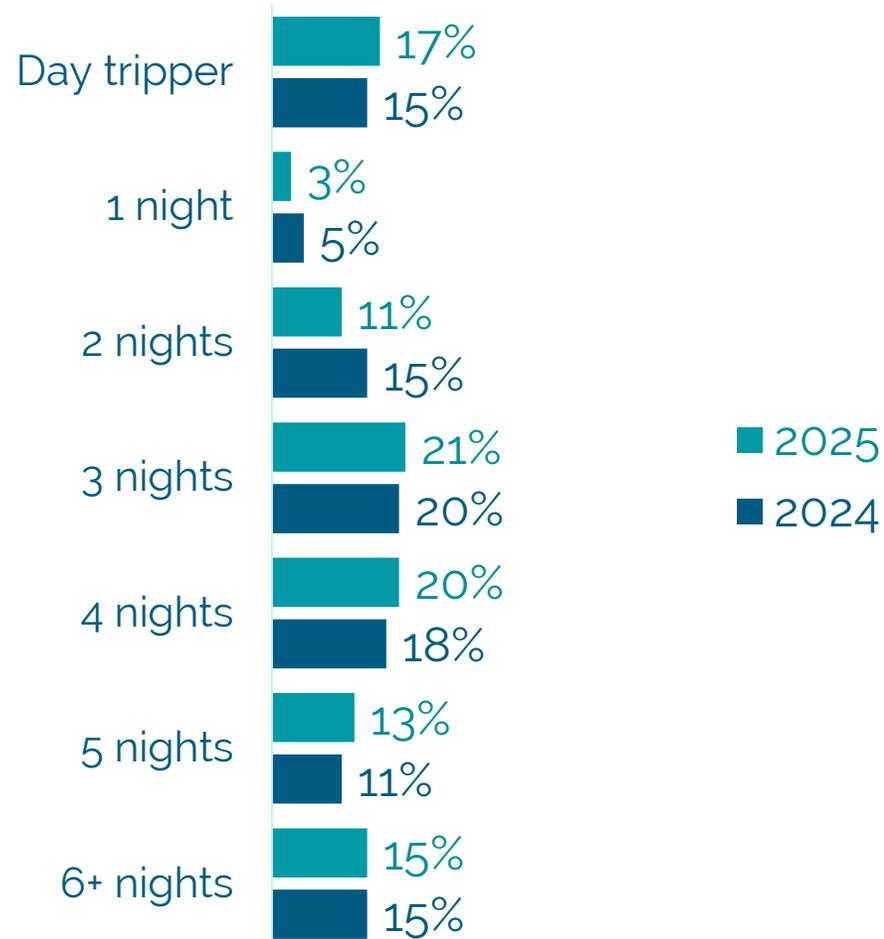
\*18% of all visitors used the Jacksonville International Airport (-7% points from 2024).

# ACCOMMODATIONS

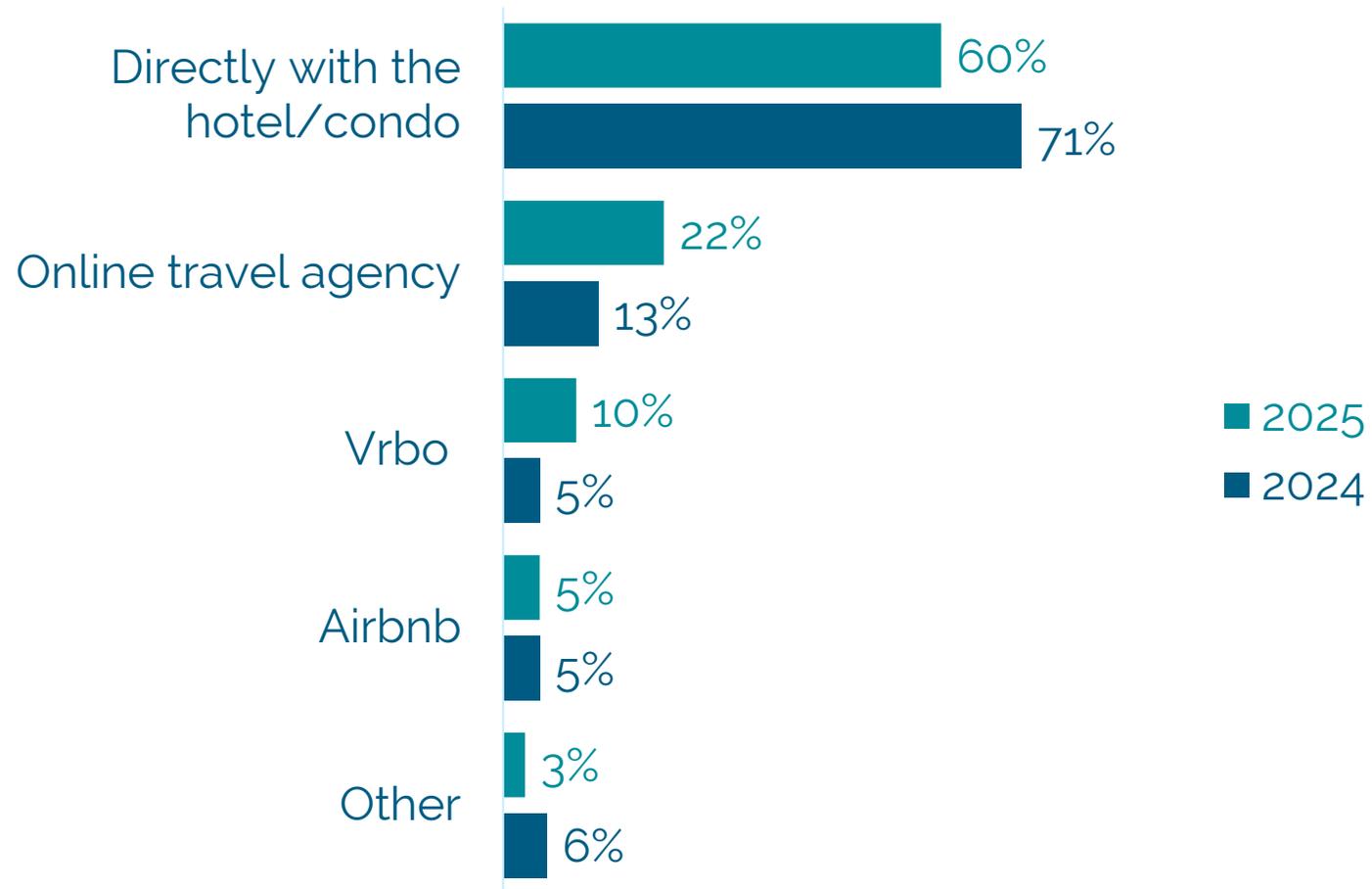


# NIGHTS STAYED

Average nights stayed (all visitors): **4.0 (+0.2 from 2024)**  
Average nights stayed (paid visitors): **4.3 (+0.3 from 2024)**



# ACCOMMODATION BOOKING



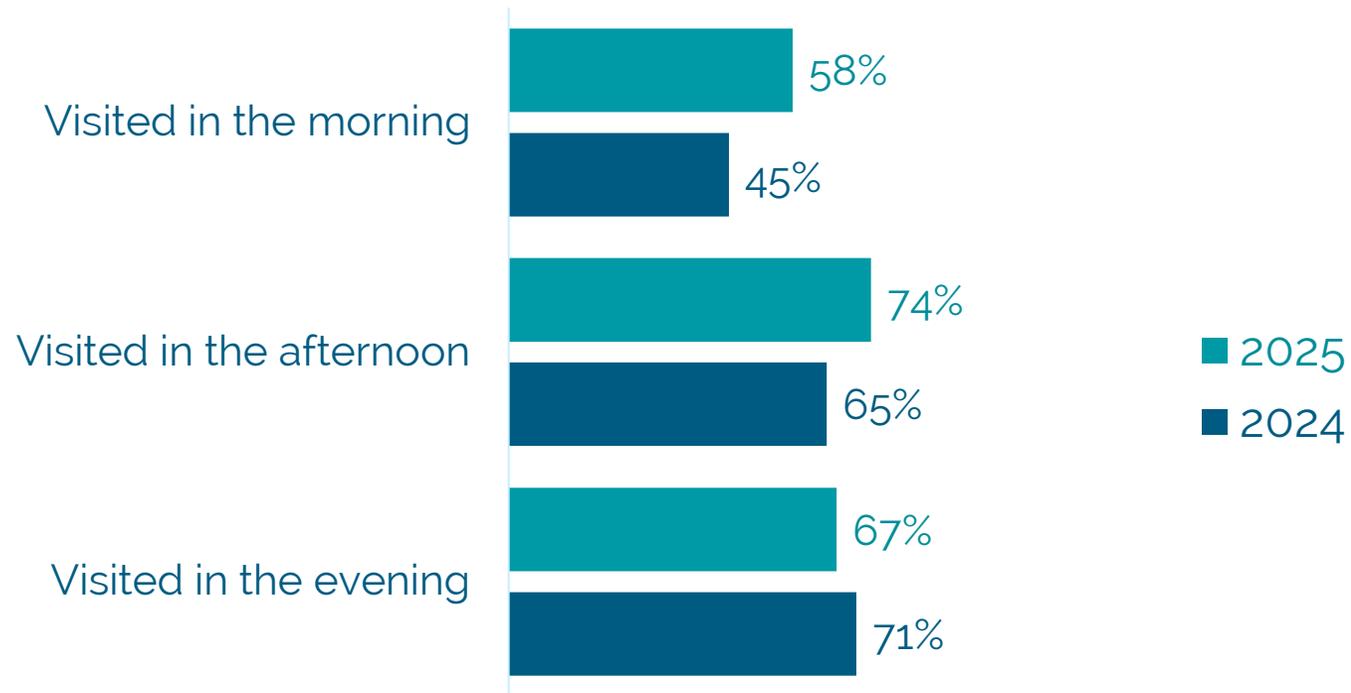
# VISITOR ACTIVITIES\*

Activity	2024	2025
Dining out	84%	87%
Historic Downtown Fernandina Beach	76%	82%
Beach	81%	77%
Shopping	51%	64%
Visit friends/relatives	31%	31%
Biking, hiking, running, etc.	25%	28%
Farmers market	14%	24%
Attractions	18%	23%
Family time	27%	23%
Bars, nightclubs	16%	22%
Golf or tennis	15%	15%
Water sports	14%	13%
State parks	15%	13%
Business meetings/conferences	8%	9%
Art galleries, museums	7%	8%
Special events	19%	7%
Dining Month	2%	6%
Spas	7%	5%
Attend/participate in a sporting event	4%	2%
Horseback riding	2%	1%
Other	4%	1%

\*Multiple responses permitted.

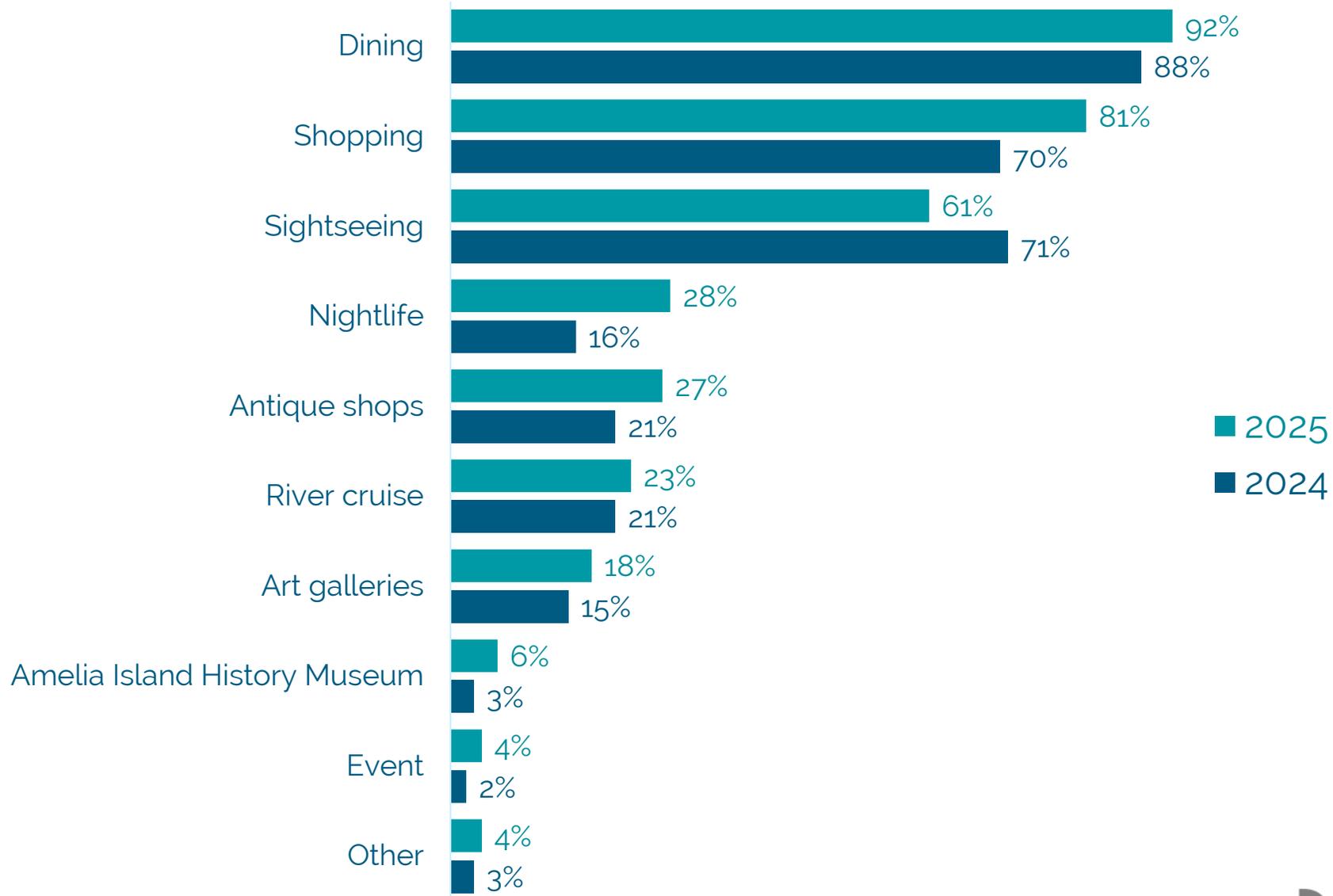
# VISITING HISTORIC DOWNTOWN\*

Average visits per trip: **2.5**  
(+0.3 from 2024)



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

# REASON FOR VISITING HISTORIC DOWNTOWN\*

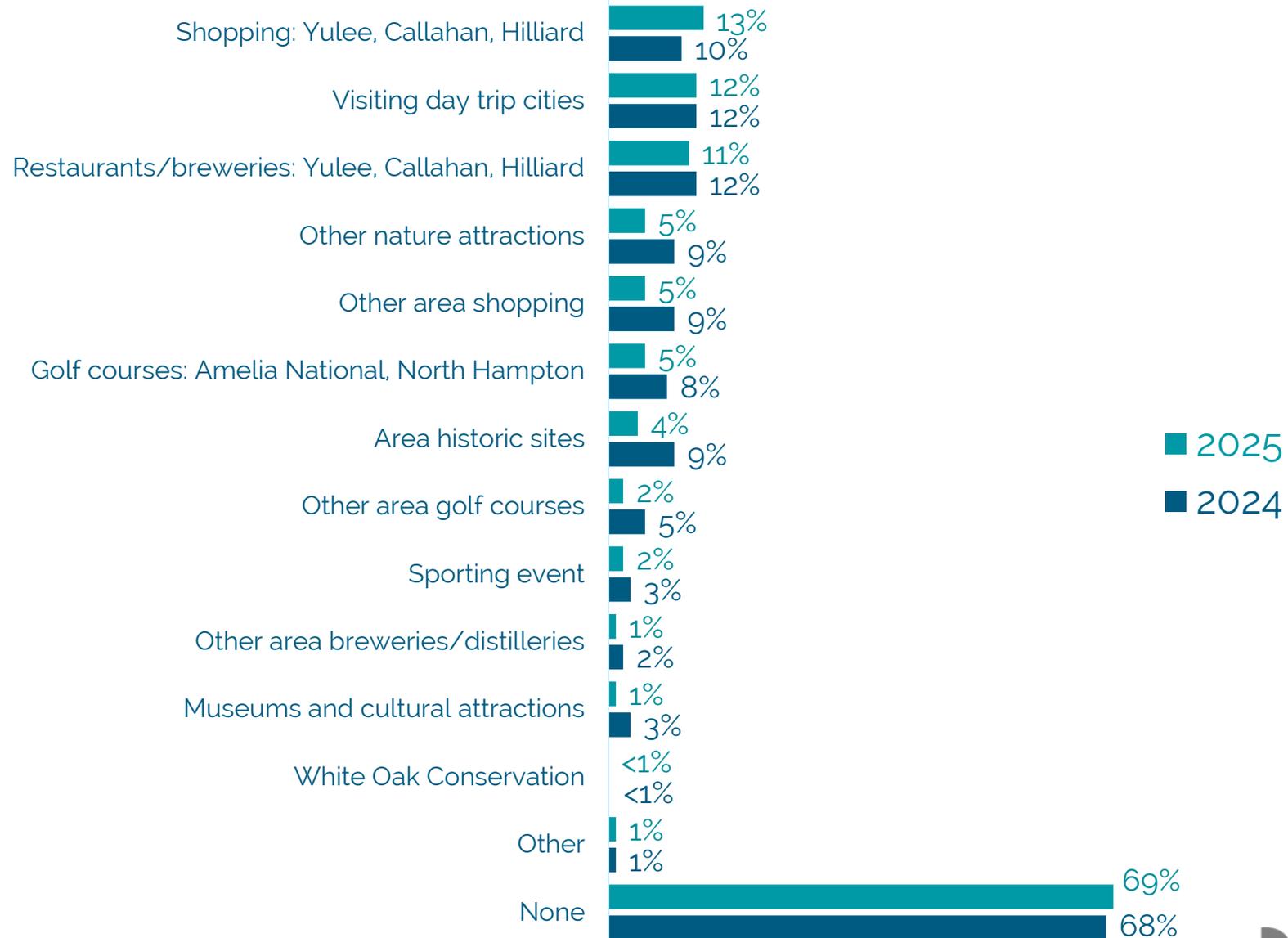


# AREAS FOR IMPROVEMENT: DOWNTOWN\*



- » Stores open later
- » Wheelchair accessibility
- » Shuttles around the island
- » More parking
- » More public restrooms
- » More benches in the shade
- » At the same time, visitors love the cleanliness, benches, architecture, tree lights, and river cruise.

# OFF-ISLAND ACTIVITIES\*



53

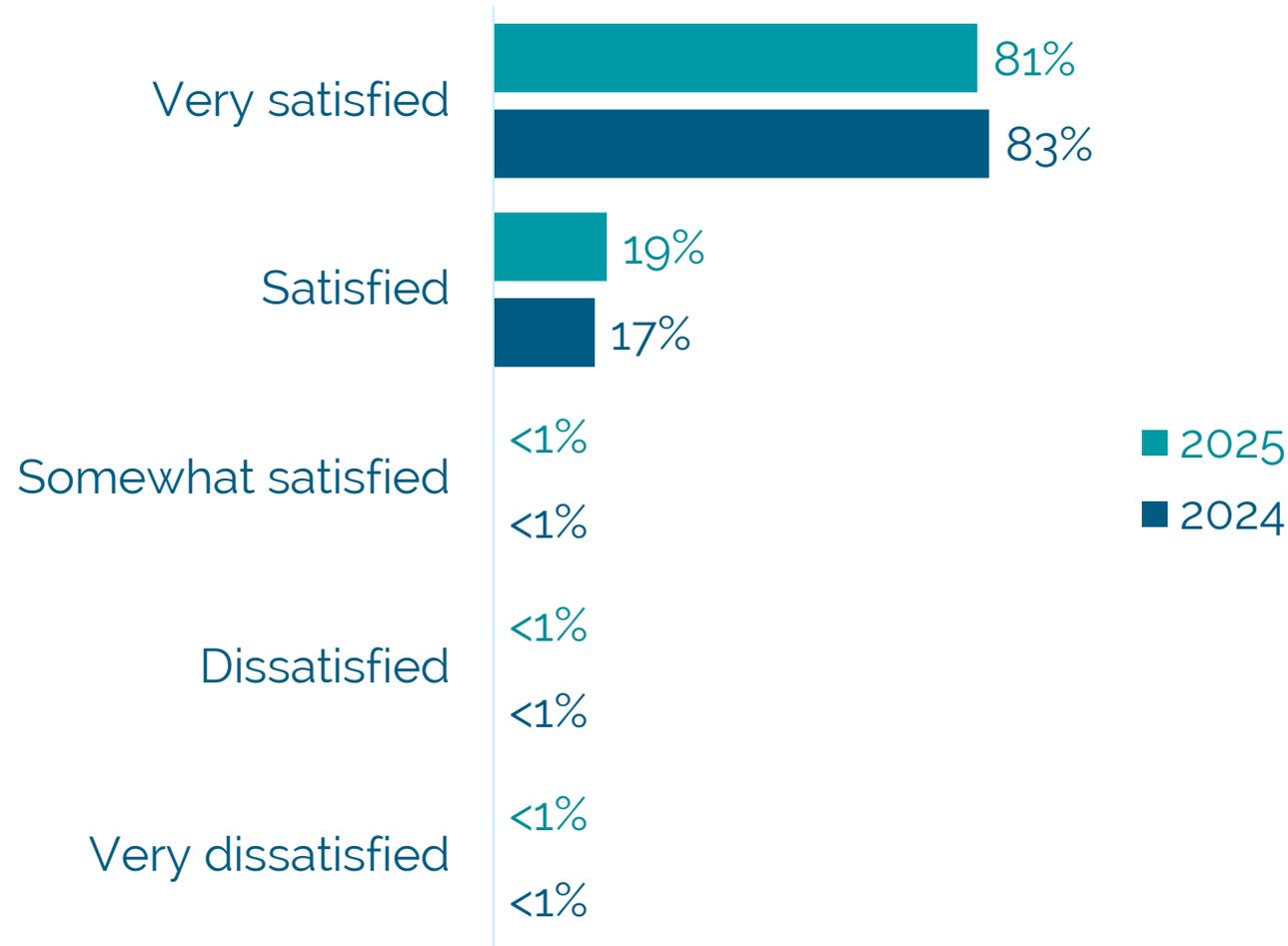
# TRAVEL PARTY SPENDING

Category	Daily Spending		Total Spending	
	2024	2025	2024	2025
Accommodations	\$207	\$194	\$787	776
Restaurants	\$153	\$156	\$581	\$624
Groceries	\$34	\$33	\$129	\$132
Shopping	\$91	\$84	\$346	\$336
Activities & attractions	\$53	\$41	\$201	\$164
Transportation	\$38	\$29	\$144	\$116
Other	\$16	\$10	\$61	\$40
<b>Total</b>	<b>\$592</b>	<b>\$547</b>	<b>\$2,250</b>	<b>\$2,188</b>

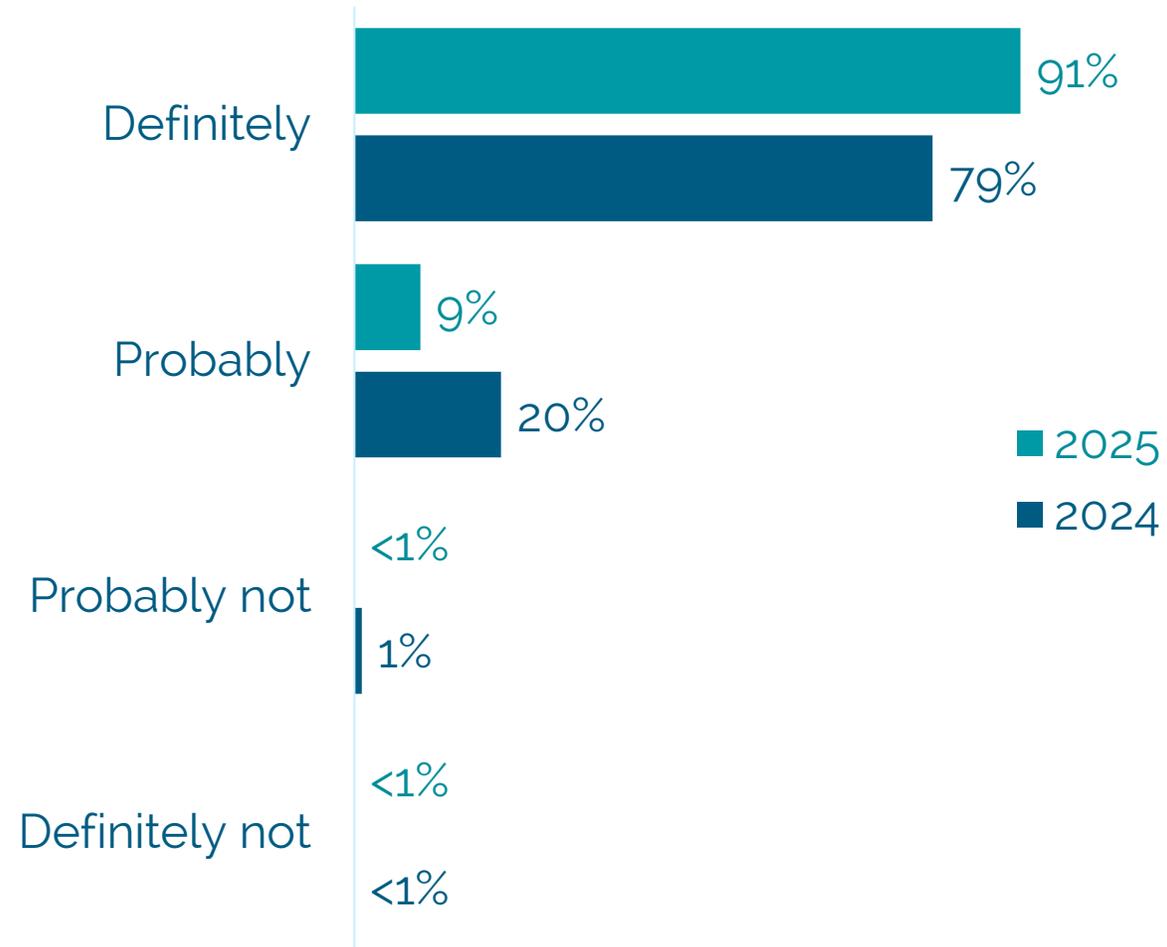
# VISITOR JOURNEY: POST-TRIP



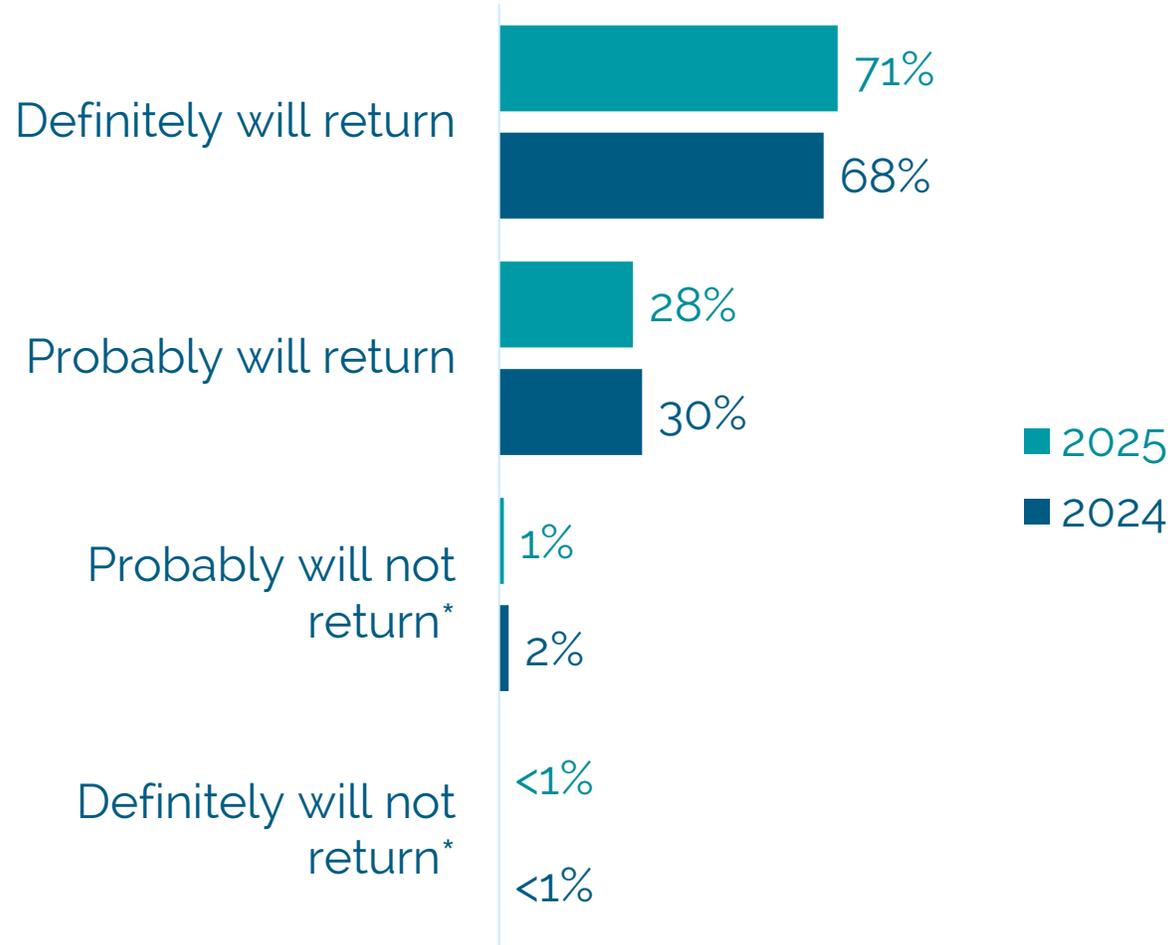
# VISITOR SATISFACTION



# RECOMMENDATION



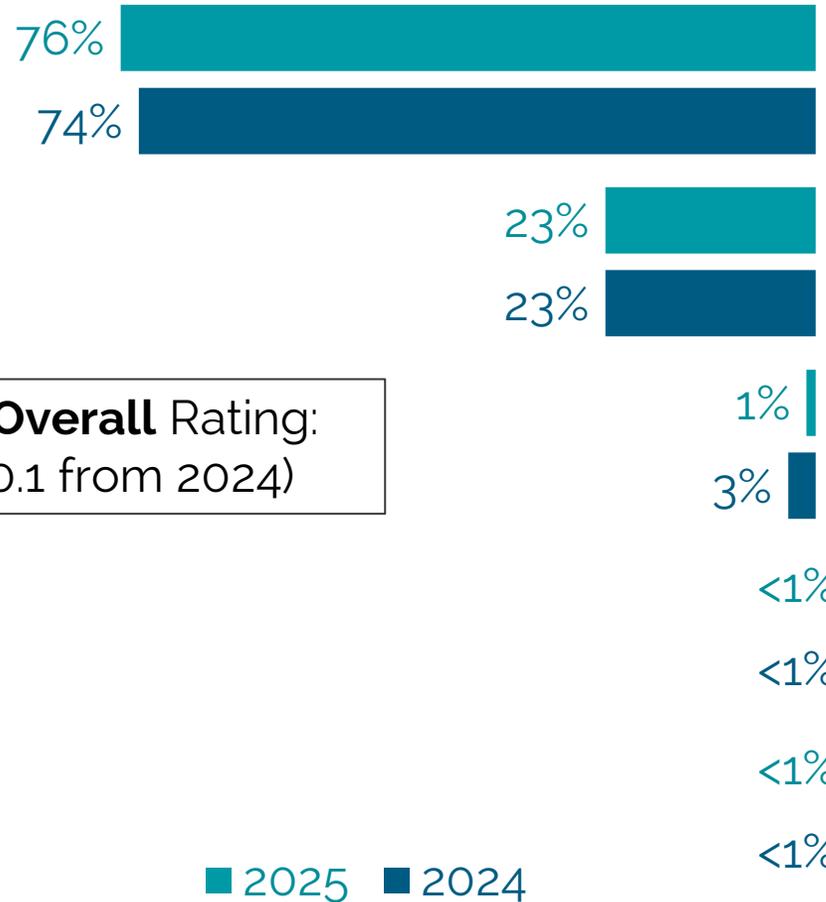
# LIKELIHOOD OF RETURNING



\*Top reasons for not returning were 1) difficulty getting to the area, 2) a preference for variety in vacation spots, and 3) difficulty parking in the area.

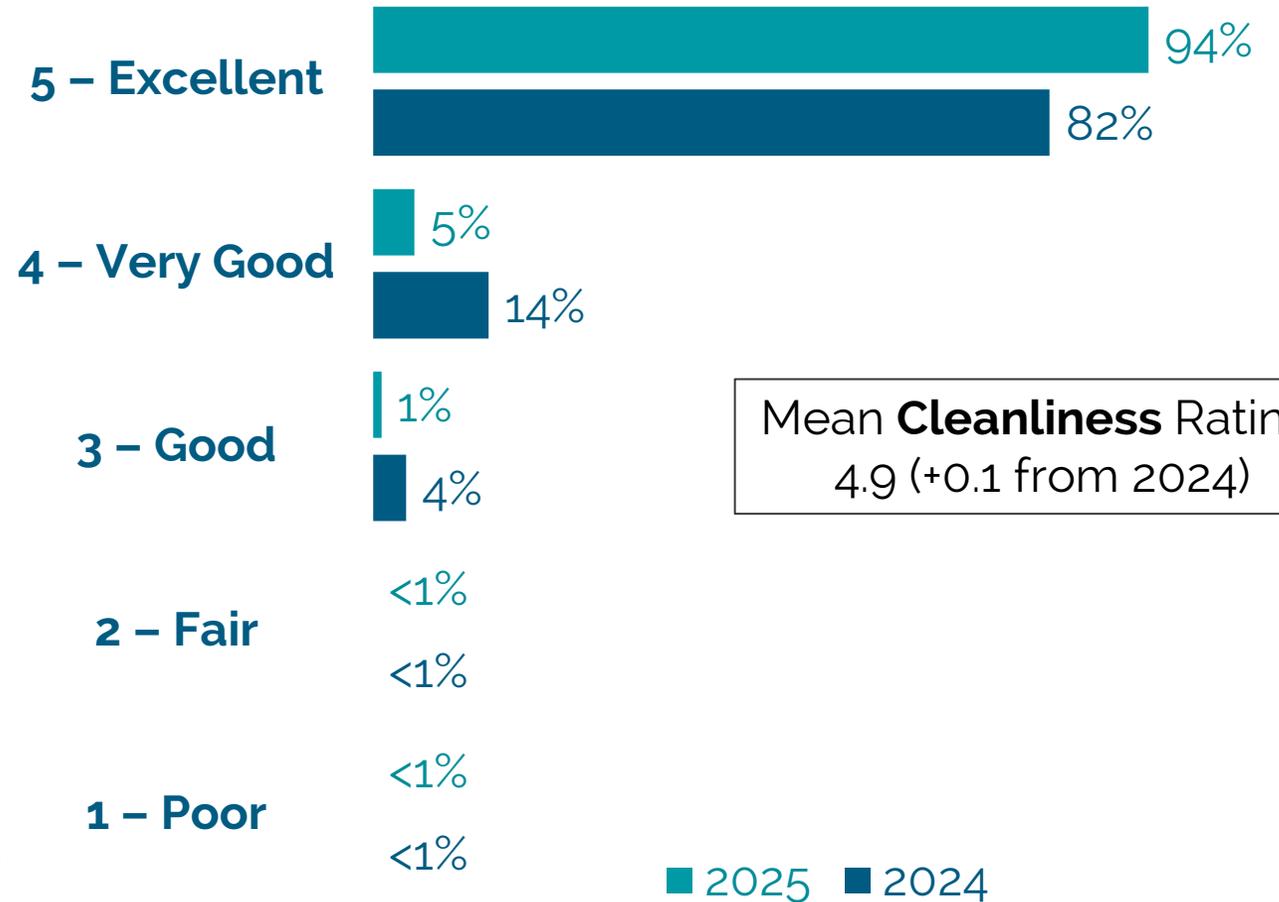
# BEACH RATINGS

## Overall Beach Rating



Mean **Overall** Rating:  
4.8 (+0.1 from 2024)

## Beach Cleanliness Rating



Mean **Cleanliness** Rating:  
4.9 (+0.1 from 2024)

# AREA DESCRIPTIONS\*



- “Wonderful small, quaint town. Truly Old Florida.”
- “Beautiful, chill, fun, and full of nice people.”
- “Great golf, lovely beaches, and fun restaurants.”
- “Peaceful and safe, yet vibrant and alive.”
- “Like several types of vacations rolled into one!”
- “A manageable size and reasonable prices.”
- “A great place for a conference – there’s so much to do!”
- “It has maintained its quiet charm over the years.”

# Amelia Island CVB

## Visitor Tracking Study July – September 2025

Downs & St. Germain Research  
contact@dsg-research.com  
850-906-3111 | www.dsg-research.com

