

Amelia Island CVB

Visitor Tracking Study
October – December 2025

METHODOLOGY



Data Collection:

From October 1, 2025, to December 31, 2025, **538** visitors were interviewed in person at events, the beach, The Shops at The Omni, downtown, as well as online.

Note: The sampling error for a sample size of 538 is $\pm 4.2\%$ points given a 95% confidence level. That is, we are very certain (95%) that the results in our visitor tracking study are within 4.2% points of the "true" value on a quarterly basis.

KEY PERFORMANCE INDICATORS



KEY PERFORMANCE INDICATORS Q1 FY26*

Similar to last quarter, a decrease in visitor number combined with lower ADR and less discretionary spending led to a 2.7% decrease in overall visitor spend in FY26 Q1.



200,400

**Total
Visitors**

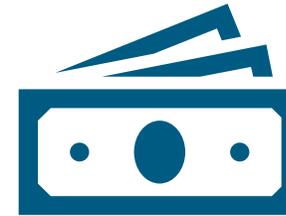
- 3.2% from FY25



152,390

**Room
Nights**

- 3.8% from FY25



\$127,388,500

**Direct
Spending**

- 2.7% from FY25



44.0%

Occupancy

- 6.4% from FY25

LODGING METRICS Q1 FY26

COMBINED



44.0%

Occupancy

- 6.4% from FY25



\$265.96

Average Daily Rate

- 1.3% from FY25



\$116.93

Revenue Per Available Room

- 7.6% from FY25

HOTELS*



54.6%

Occupancy

- 1.3% from FY25



\$271.36

Average Daily Rate

+ 2.9% from FY25



\$148.15

Revenue Per Available Room

+ 1.5% from FY25

VACATION RENTALS**



26.3%

Occupancy

- 17.8% from FY25



\$257.00

Average Daily Rate

- 8.2% from FY25



\$67.59

Revenue Per Available Room

- 24.6% from FY25

VISITOR PROFILE SUMMARY



VISITOR PROFILE Q1 FY26



53

Median Age

31%

First-Time Visitor

\$141,070

Median Household Income

\$517

Average Daily Travel Party Spend

2.9

Travel Party Size

3.3

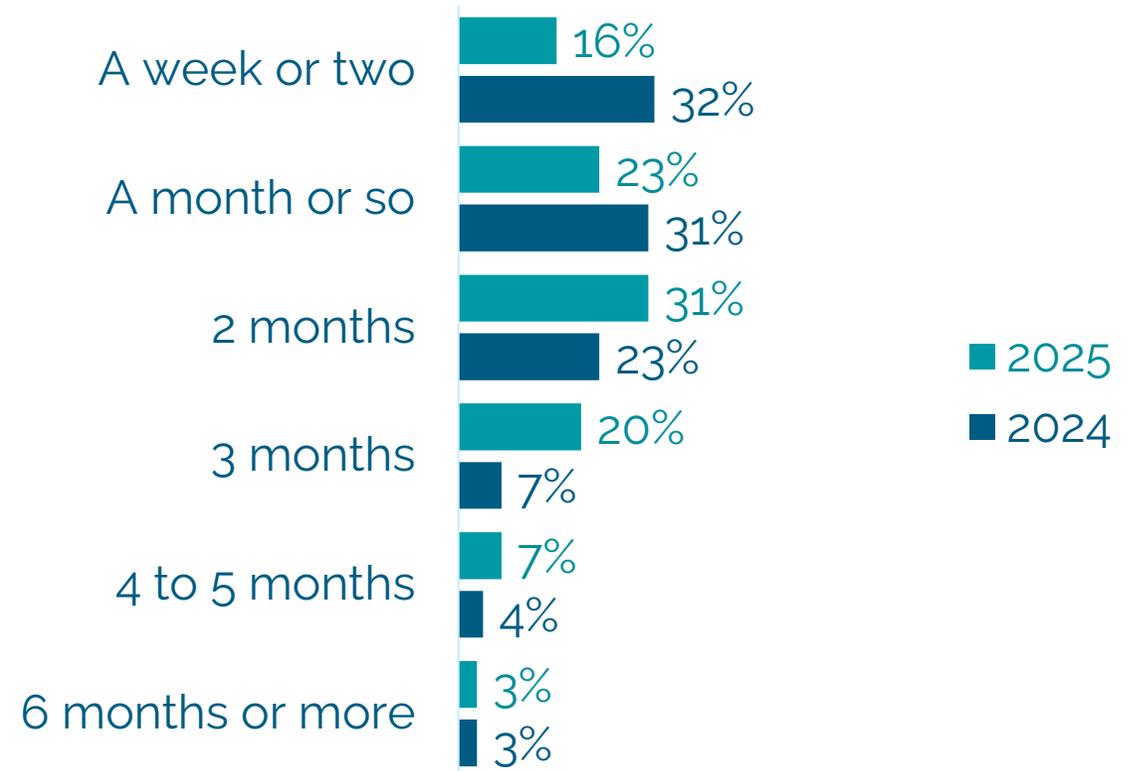
Length of Stay

TRIP BOOKING CYCLE Q1 FY26*

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

Average booking cycle: **60 days**
(+16 days from 2024)

» In a change from the trend of shortening booking cycles, Amelia Island's booking cycle increased by 16 days YOY in Q1



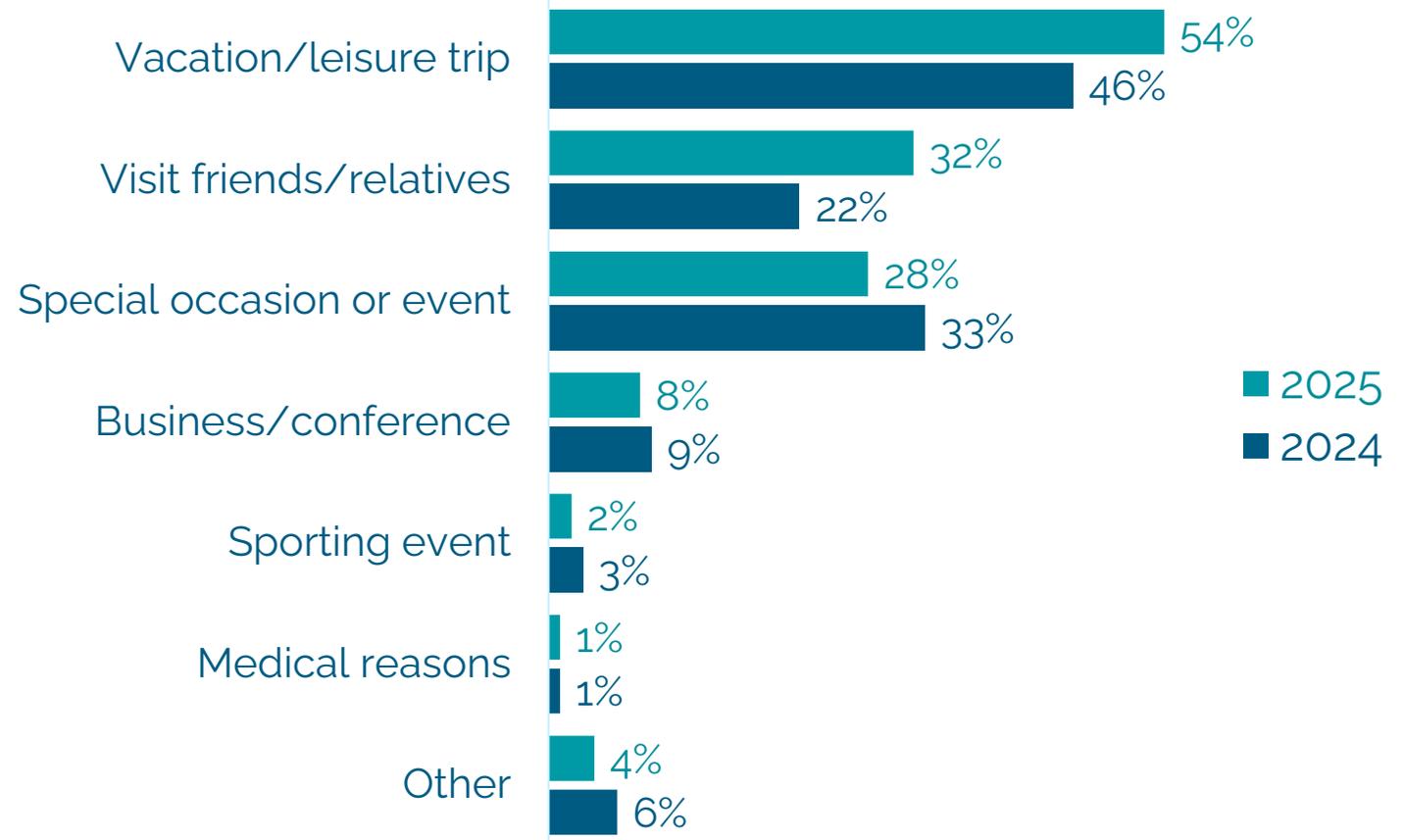
*Based on visitors traveling for leisure.

MAIN REASONS FOR VISITING Q1 FY26*

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

» **Despite continued economic uncertainty nationwide, Amelia Island's share of leisure visitation increased by 8% points in Q1**

» **10% points more visitors came to the area to visit friends or relatives, going along with several trends in the Q1 data**



*Multiple responses permitted.

STRAIGHT FROM YOUR VISITORS: Q1 FY26*



Reasons for Choosing Amelia Island

"We were looking for something family-friendly."

"I wanted a place that felt like a real escape."

"It's less commercialized and more authentic."

ADVERTISING AND PROMOTION SOURCES Q1 FY26*

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

» This quarter continued a trend of fewer visitors recalling ads for Amelia Island (-10% points), aligning with more visitors traveling to see friends and relatives

Advertising Source	2024	2025
Online article	10%	12%
Amelia Island's social media	16%	10%
Personal social media	14%	8%
Magazine article	8%	5%
Traveler reviews/blogs	5%	5%
Ad on a website	7%	4%
Magazine ad	5%	3%
Travel/visitor guide	4%	3%
Television	2%	1%
Video streaming services	2%	1%
Podcast	1%	1%
Newspaper	1%	1%
Rental agency/other booking website	2%	1%
Deal-based promotion	1%	1%
AAA	1%	1%
Other	2%	2%

TOP ORIGIN MARKETS Q1 FY26

Top Origin Markets – All Visitors

Market	2024	2025
Jacksonville*	24%	25%
Atlanta	7%	8%
Orlando-Daytona Beach-Melbourne	6%	7%
New York City**	4%	3%
Sarasota-Bradenton	2%	3%
Charlotte	2%	2%
Greenville-Spartanburg-Asheville	2%	2%
Miami-Fort Lauderdale	1%	2%
Tallahassee-Thomasville	1%	2%
Washington, DC-Hagerstown	3%	2%
West Palm Beach-Ft. Pierce	2%	2%

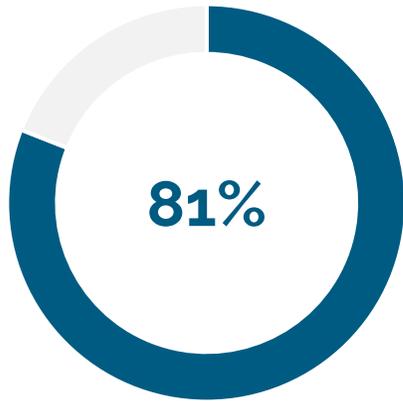
Top Origin Markets – Overnight Visitors

Market	2024	2025
Jacksonville*	11%	12%
Atlanta	8%	10%
Orlando-Daytona Beach-Melbourne	8%	8%
Charlotte	2%	3%
New York City**	4%	3%
Savannah	3%	3%
Tampa-St. Petersburg	3%	3%
Chicago	2%	2%
Greenville-Spartanburg-Asheville	2%	2%
Miami-Fort Lauderdale	1%	2%
Philadelphia	2%	2%
Tallahassee-Thomasville	2%	2%
Washington, DC-Hagerstown	3%	2%

*Includes Jacksonville, FL and Brunswick, GA.

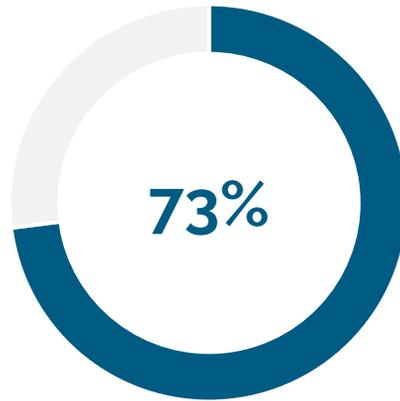
**Includes parts of Connecticut, New Jersey, and Pennsylvania.

SATISFACTION STATISTICS Q1 FY26



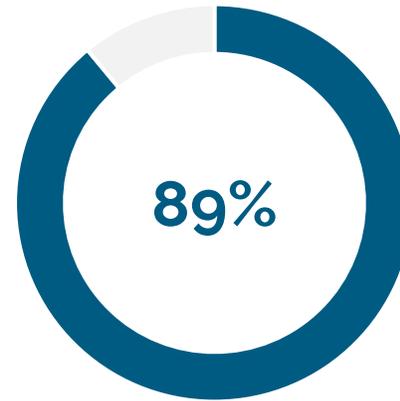
VERY SATISFIED

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



DEFINITELY RETURN

73% of visitors said they would definitely return to the area.



DEFINITELY RECOMMEND

89% 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 4.7 out of 5.

STRAIGHT FROM YOUR VISITORS: Q1 FY26*



Describing Amelia Island

"The perfect combination of beach, commerce, and charm."

"A Southern town staying true to its roots."

"Beach life with a little sophistication."

"Peaceful and not overdeveloped."

VISITOR PROFILE INSIGHTS Q1 FY26

Insights

Leisure visitor booking window lengthened substantially YOY

Leisure visitor share increased YOY, particularly foodie trips

A larger share of visitors came to the area to visit friends or relatives

This quarter continued a trend of fewer visitors recalling ads

More visitors traveled from the Jacksonville and Atlanta areas

More visitors would definitely recommend the area to friends/family

DETAILED FINDINGS



VISITOR JOURNEY: KEY PERFORMANCE INDICATORS



TOURISM SNAPSHOT: KPIs

	October – December 2024	October – December 2025	% Δ
Visitors	207,100	200,400	- 3.2%
Visitor Days ¹	621,300	661,320	+ 6.4%
Direct Spending	\$130,912,500	\$127,388,500	- 2.7%

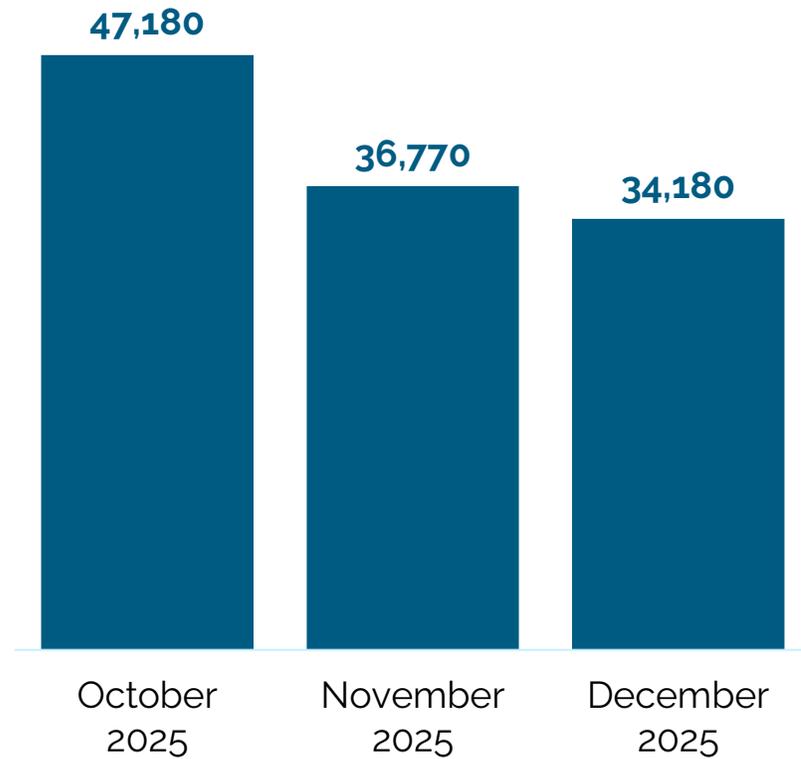
	October – December 2024	October – December 2025	% Δ
Occupancy ²	46.9%	44.0%	- 6.4%
ADR ²	\$269.58	\$265.96	- 1.3%
RevPAR ²	\$126.56	\$116.93	- 7.6%
Room Nights ²	158,480	152,390	- 3.8%

¹Visitor days increased despite a decrease in visitor number because length of stay increased.

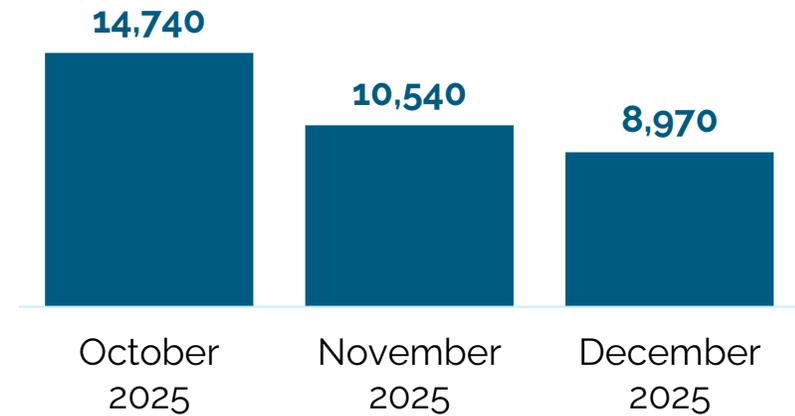
²Sources: Key Data, Smith Travel Research, Florida Department of Business and Professional Regulation.

MONTHLY ROOM NIGHTS*

Hotel Room Nights



Vacation Rental Room Nights



MONTHLY VISITOR COUNTS

Accommodation Type	October Visitors	November Visitors	December Visitors
Hotel/motel/resort	37,620	30,300	27,250
Vacation rental	9,850	7,230	5,950
Non-paid accommodations*	14,270	11,490	10,340
Day tripper	18,220	14,680	13,200
Total	79,960	63,700	56,740

VISITOR JOURNEY: PRE-VISIT



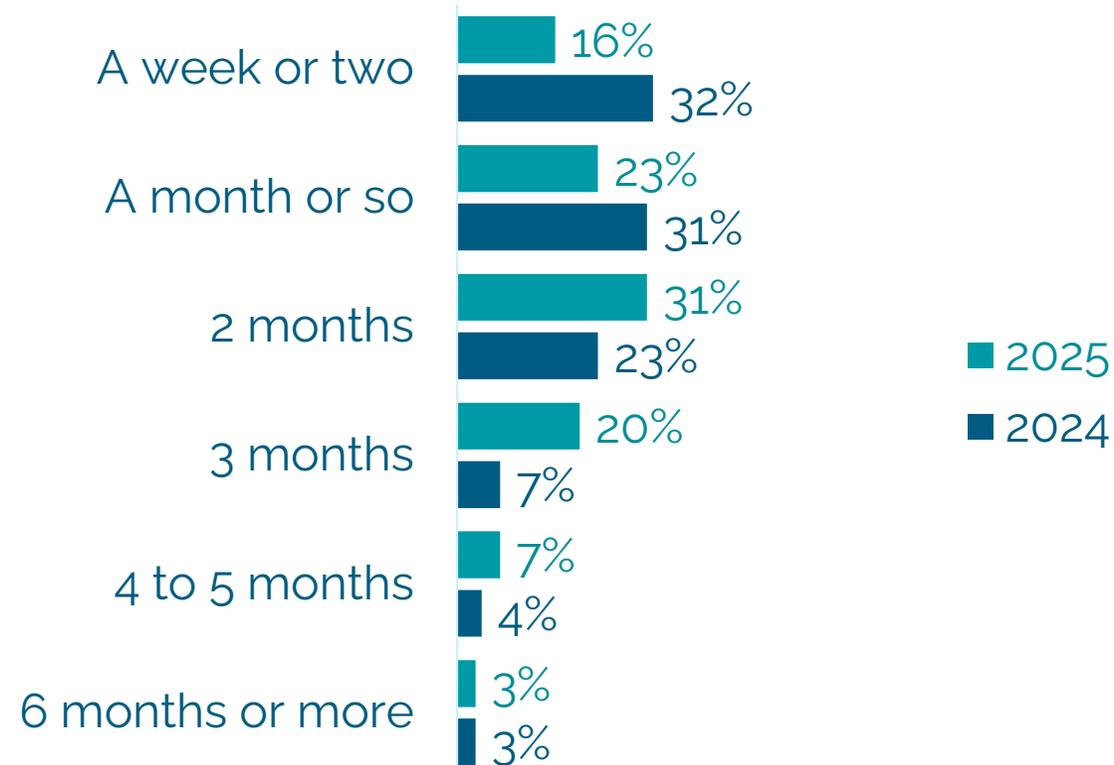
TRIP PLANNING CYCLE*

Average planning cycle: **65 days**
(+13 days from 2024)



TRIP BOOKING CYCLE*

Average booking cycle: **60 days**
(+16 days from 2024)

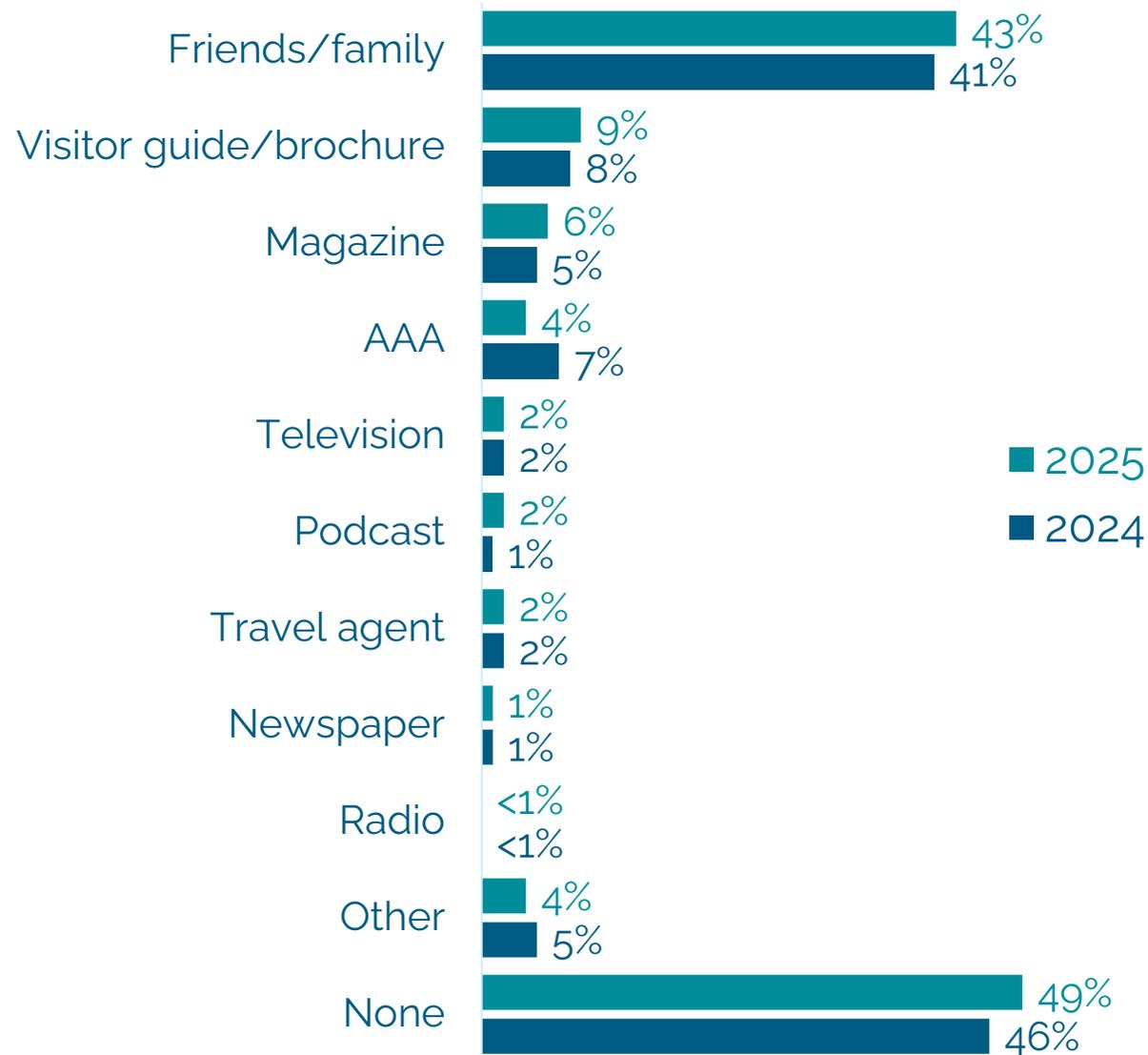


ONLINE TRIP PLANNING SOURCES*

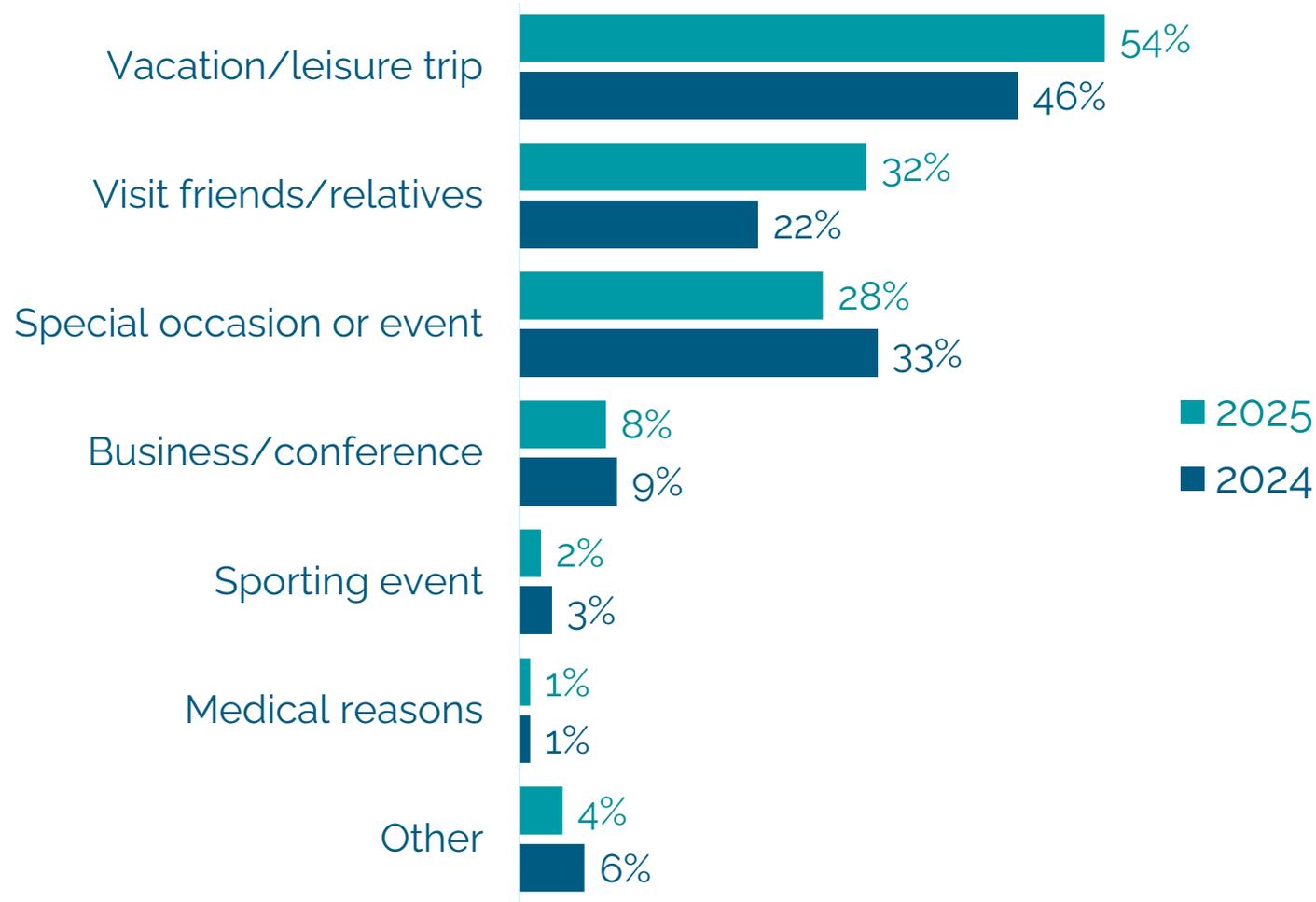
Online Planning Source	2024	2025
Review website/app	25%	28%
Amelia Island social media	28%	25%
Airbnb/Vrbo	15%	22%
Online travel agency	11%	22%
Hotel websites/apps	28%	22%
AmeliaIsland.com	15%	11%
Personal social media	18%	11%
Online travel reviews, blogs, stories	9%	11%
Mapping websites	8%	11%
Restaurant websites/apps	6%	9%
ChatGPT or other AI program	1%	6%
Video streaming services	3%	3%
Airline websites/apps	5%	3%
Amelia Island rental companies	2%	2%
Rental car websites/apps	3%	2%
Amelia Island mobile app	2%	1%
Music streaming services	1%	1%
Accessibility travel resource sites	<1%	<1%
Other	7%	5%
None	27%	32%

*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	31%	35%
Shopping	17%	21%
History	13%	17%
Foodie/culinary	12%	11%
Girls/guys trip	6%	7%
Sporting event	6%	6%
Nature, bird watching, eco tours, etc.	5%	5%
Festival	5%	5%
Company/government business	4%	4%
Holiday	4%	4%
Birthday/anniversary	4%	3%
Biking, hiking, running, etc.	4%	3%
Wedding/honeymoon	3%	3%
Conference/convention/trade show	3%	3%
Art galleries, museums, cultural events	1%	2%
Reunion	1%	2%
Water sports	1%	2%
Golf or tennis	1%	2%
Breweries/distilleries	<1%	1%
Performing arts	<1%	<1%
Concert	<1%	<1%

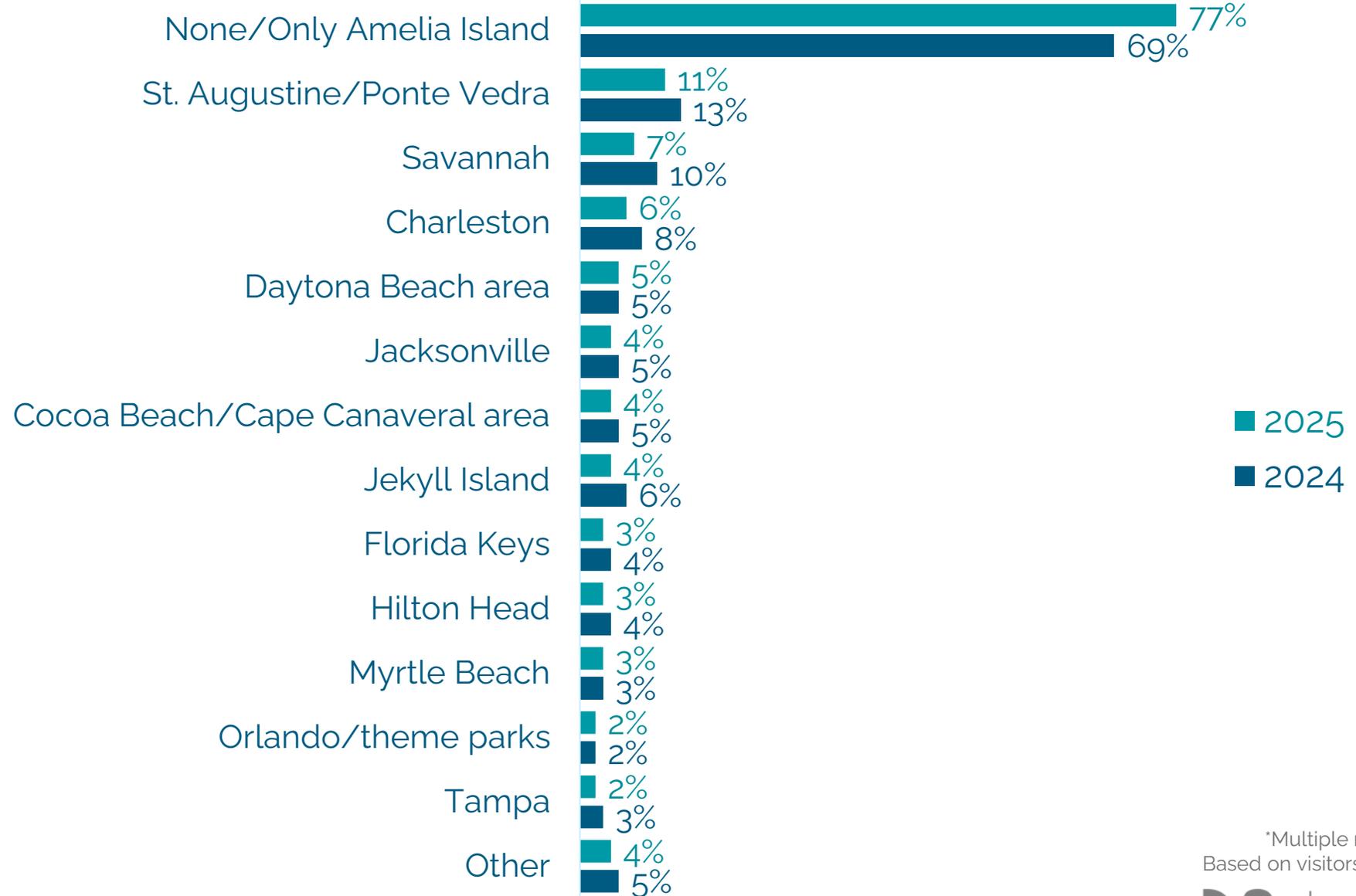
*Multiple responses permitted.
Based on all visitors traveling for leisure.

OPEN-ENDED REASONS FOR VISITING*



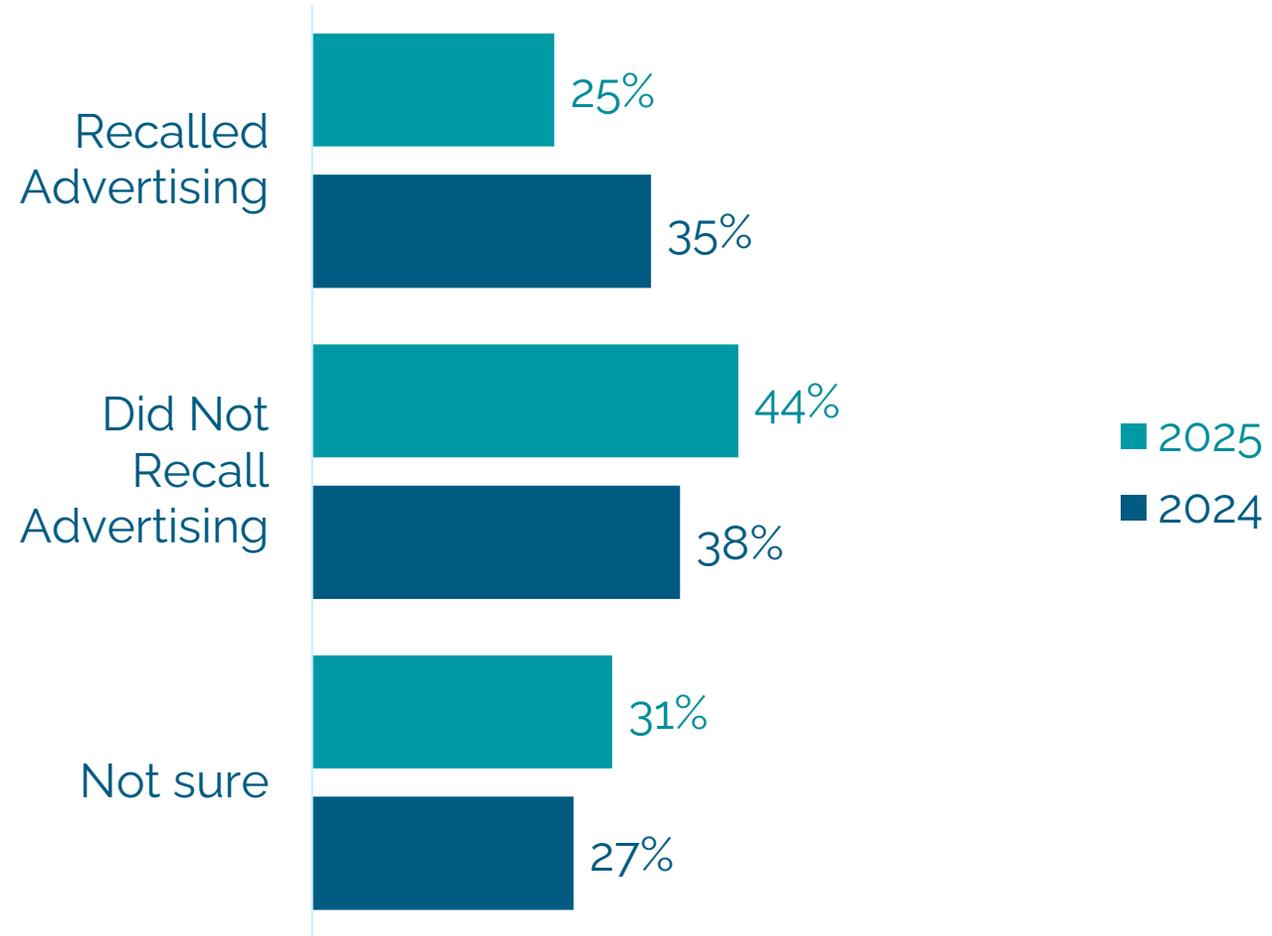
- “Other beaches are either too small or too busy.”
- “We were looking for something family-friendly.”
- “It’s less commercialized and more authentic!”
- “I wanted a place that felt like a real escape.”
- “Friends kept telling us how wonderful it was!”
- “Affordable waterfront accommodations.”
- “We just stopped by to experience something different!”
- “We decided to visit after seeing family in Jax.”

OTHER DESTINATIONS CONSIDERED*



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

ADVERTISING RECALL*



ADVERTISING SOURCES*

Advertisements influenced **15%** of **all leisure visitors** to visit the Amelia Island area (**-3% points from 2024**).

Advertising Source	2024	2025
Online article	10%	12%
Amelia Island's social media	16%	10%
Personal social media	14%	8%
Magazine article	8%	5%
Traveler reviews/blogs	5%	5%
Ad on a website	7%	4%
Magazine ad	5%	3%
Travel/visitor guide	4%	3%
Television	2%	1%
Video streaming services	2%	1%
Podcast	1%	1%
Newspaper	1%	1%
Rental agency/other booking website	2%	1%
Deal-based promotion	1%	1%
AAA	1%	1%
Billboard	<1%	<1%
Music streaming services	<1%	<1%
Radio	<1%	<1%
Weather app	1%	<1%
Other	2%	2%

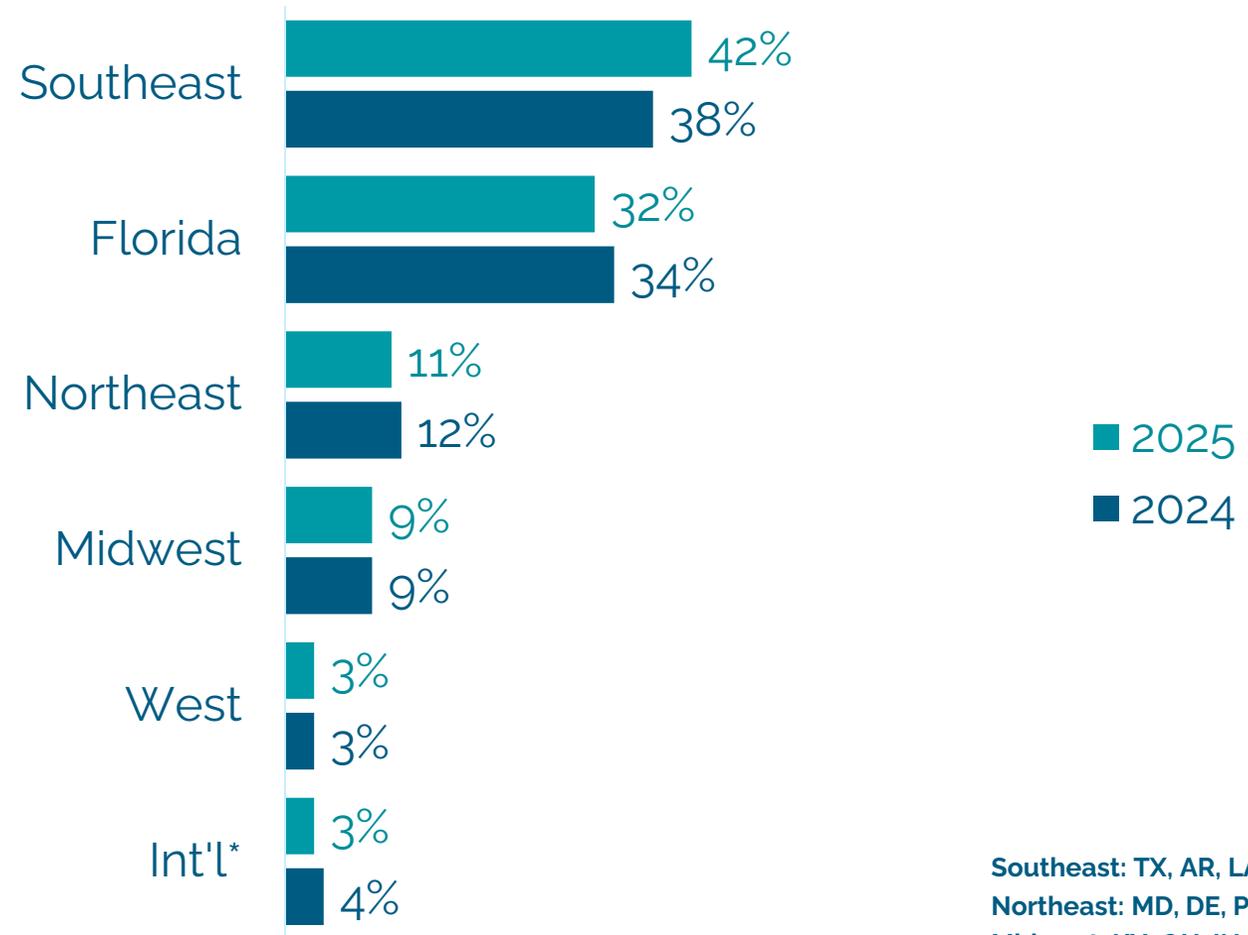
*Multiple responses permitted.
Based on all visitors traveling for leisure.



VISITOR JOURNEY: TRAVEL PARTY PROFILE



REGION OF ORIGIN

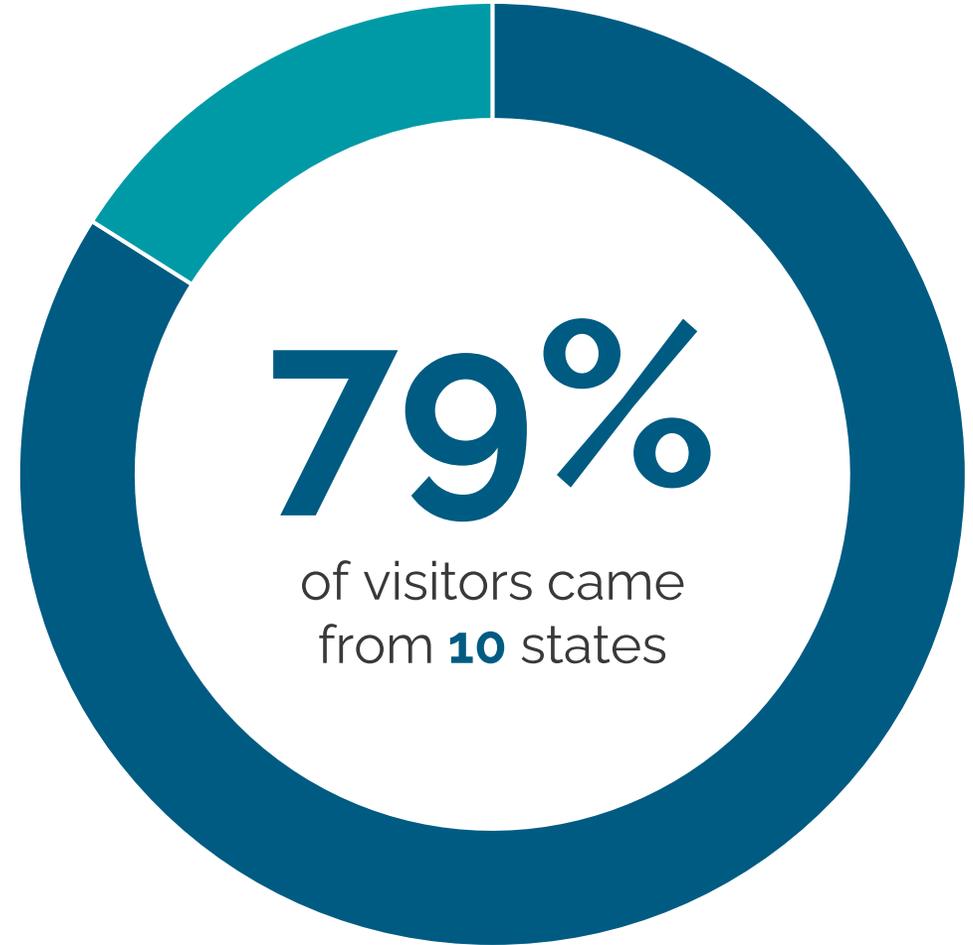


Southeast: TX, AR, LA, TN, MS, AL, VA, WV, NC, SC, GA
Northeast: MD, DE, PA, NJ, NY, CT, RI, MA, VT, NH, ME
Midwest: KY, OH, IN, MI, WI, IL, MN, IA, MO, ND, SD, NE, KS, OK
West: WA, OR, CA, NV, ID, MT, WY, CO, UT, AZ, NM, AK, HI

* The top international market was Canada (1%; -1% point from 2024).

TOP ORIGIN STATES

State	2024	2025
Florida	34%	32%
Georgia	20%	23%
North Carolina	6%	5%
South Carolina	3%	4%
New York	4%	3%
Tennessee	2%	3%
Virginia	3%	3%
Illinois	2%	2%
Ohio	2%	2%
Pennsylvania	2%	2%



TOP ORIGIN MARKETS

Top Origin Markets – All Visitors

Market	2024	2025
Jacksonville*	24%	25%
Atlanta	7%	8%
Orlando-Daytona Beach-Melbourne	6%	7%
New York City**	4%	3%
Sarasota-Bradenton	2%	3%
Charlotte	2%	2%
Greenville-Spartanburg-Asheville	2%	2%
Miami-Fort Lauderdale	1%	2%
Tallahassee-Thomasville	1%	2%
Washington, DC-Hagerstown	3%	2%
West Palm Beach-Ft. Pierce	2%	2%

Top Origin Markets – Overnight Visitors

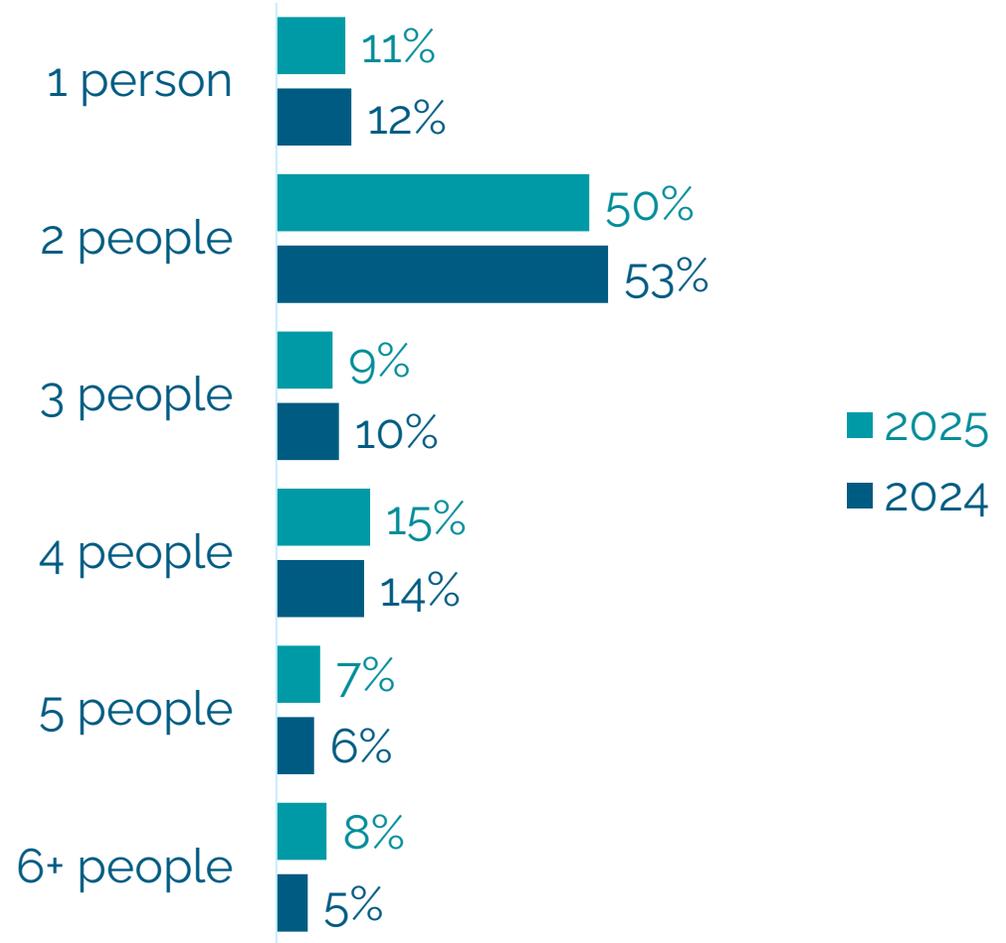
Market	2024	2025
Jacksonville*	11%	12%
Atlanta	8%	10%
Orlando-Daytona Beach-Melbourne	8%	8%
Charlotte	2%	3%
New York City**	4%	3%
Savannah	3%	3%
Tampa-St. Petersburg	3%	3%
Chicago	2%	2%
Greenville-Spartanburg-Asheville	2%	2%
Miami-Fort Lauderdale	1%	2%
Philadelphia	2%	2%
Tallahassee-Thomasville	2%	2%
Washington, DC-Hagerstown	3%	2%

*Includes Jacksonville, FL and Brunswick, GA.

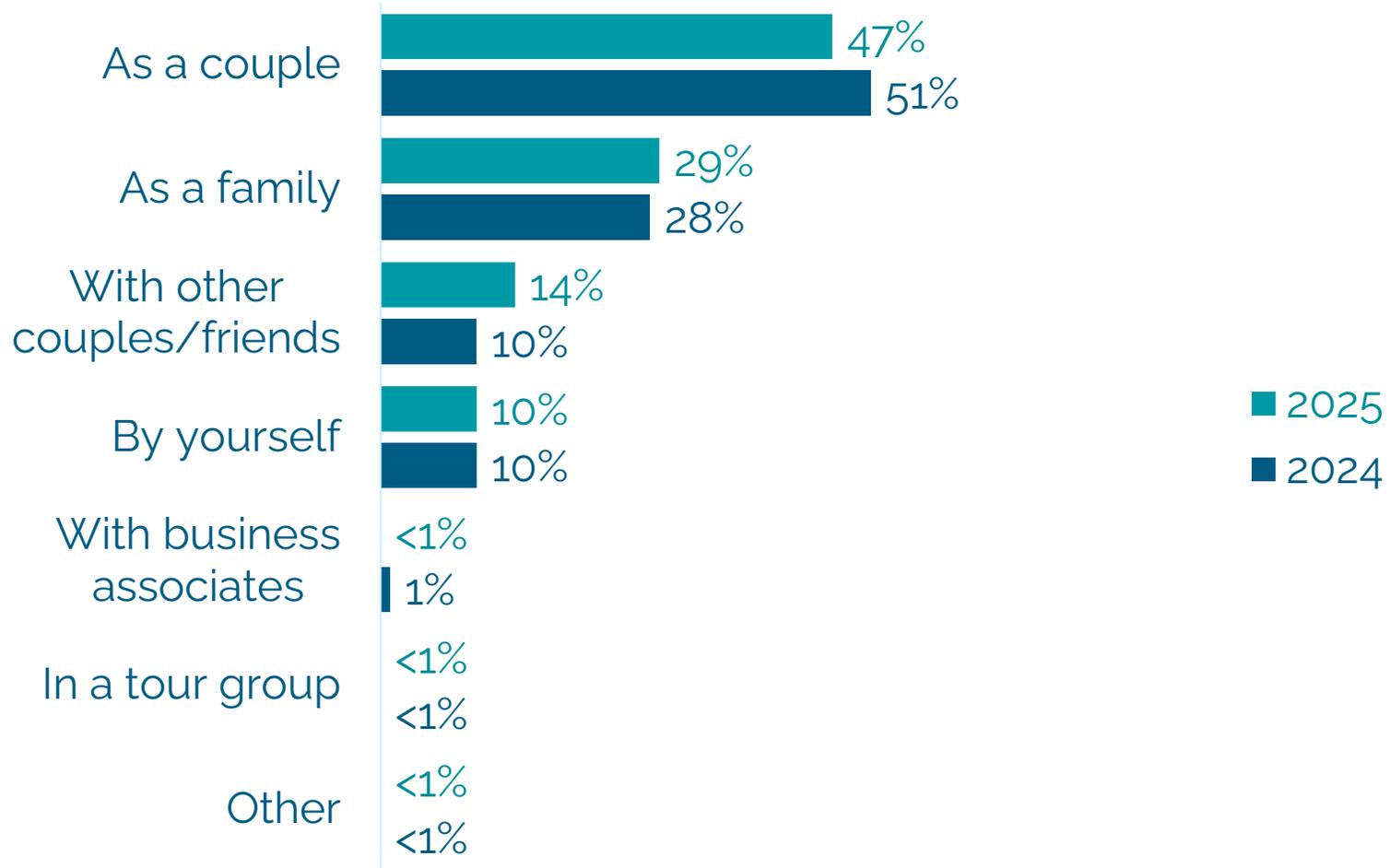
**Includes parts of Connecticut, New Jersey, and Pennsylvania.

TRAVEL PARTY SIZE

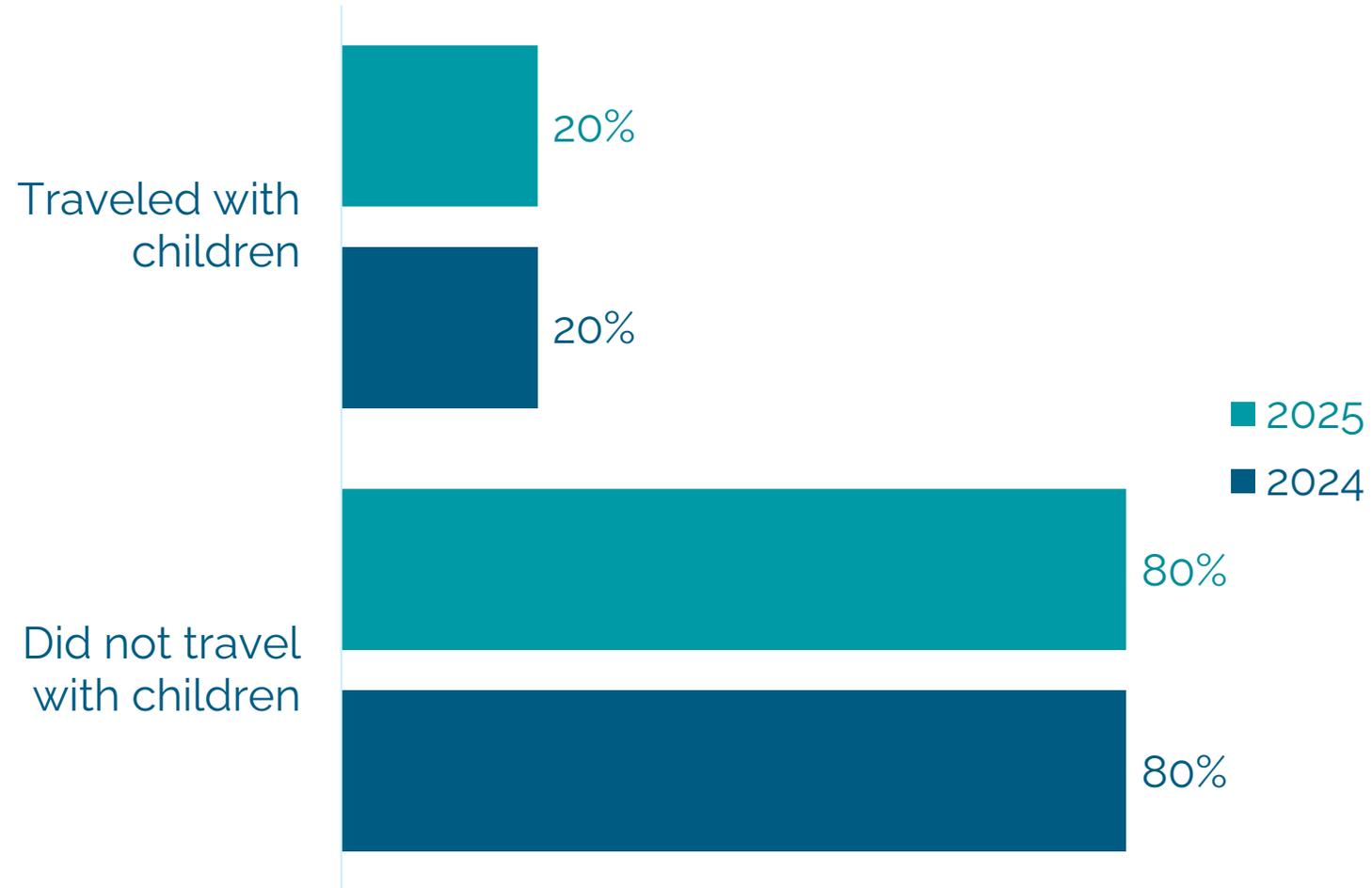
Average travel party size: **2.9**
(+0.2 from 2024)



TRAVEL PARTY TYPE

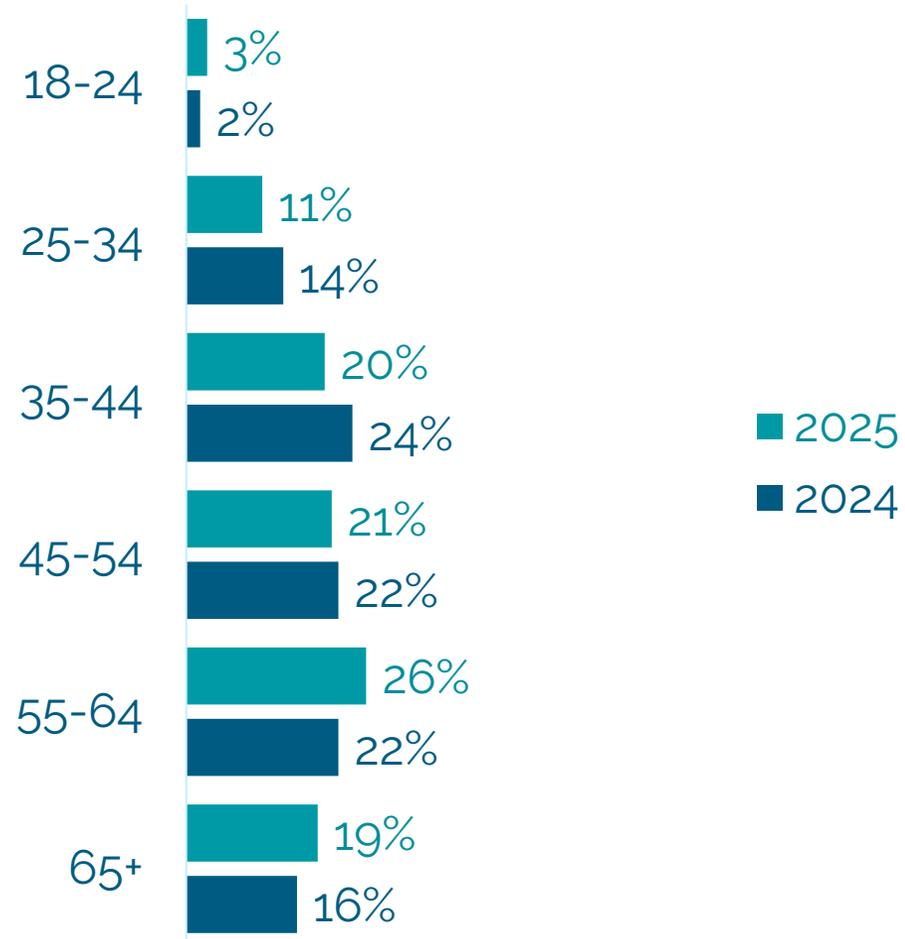


TRAVELED WITH CHILDREN



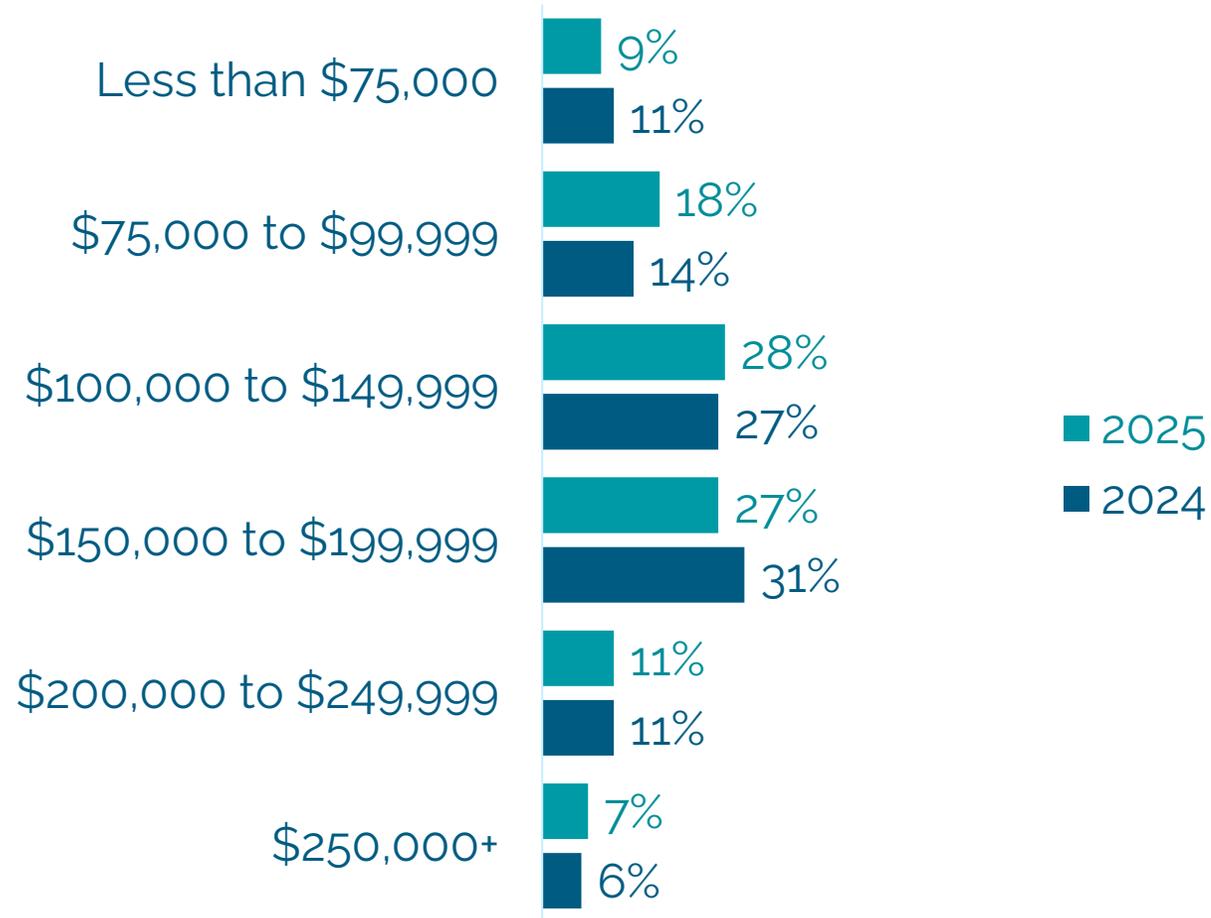
AGE

Median age: **53**
(+3 years from 2024)

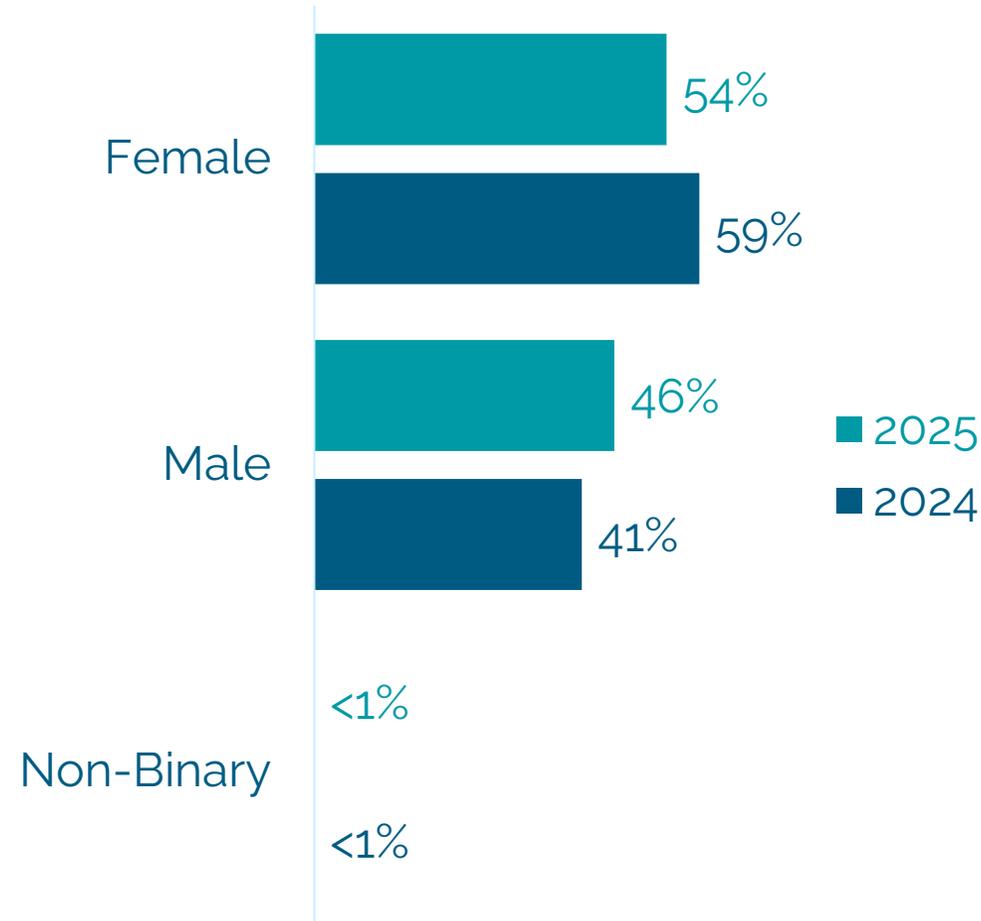


HOUSEHOLD INCOME

Median household income: **\$141,070**
(**-\$5,230 from 2024**)

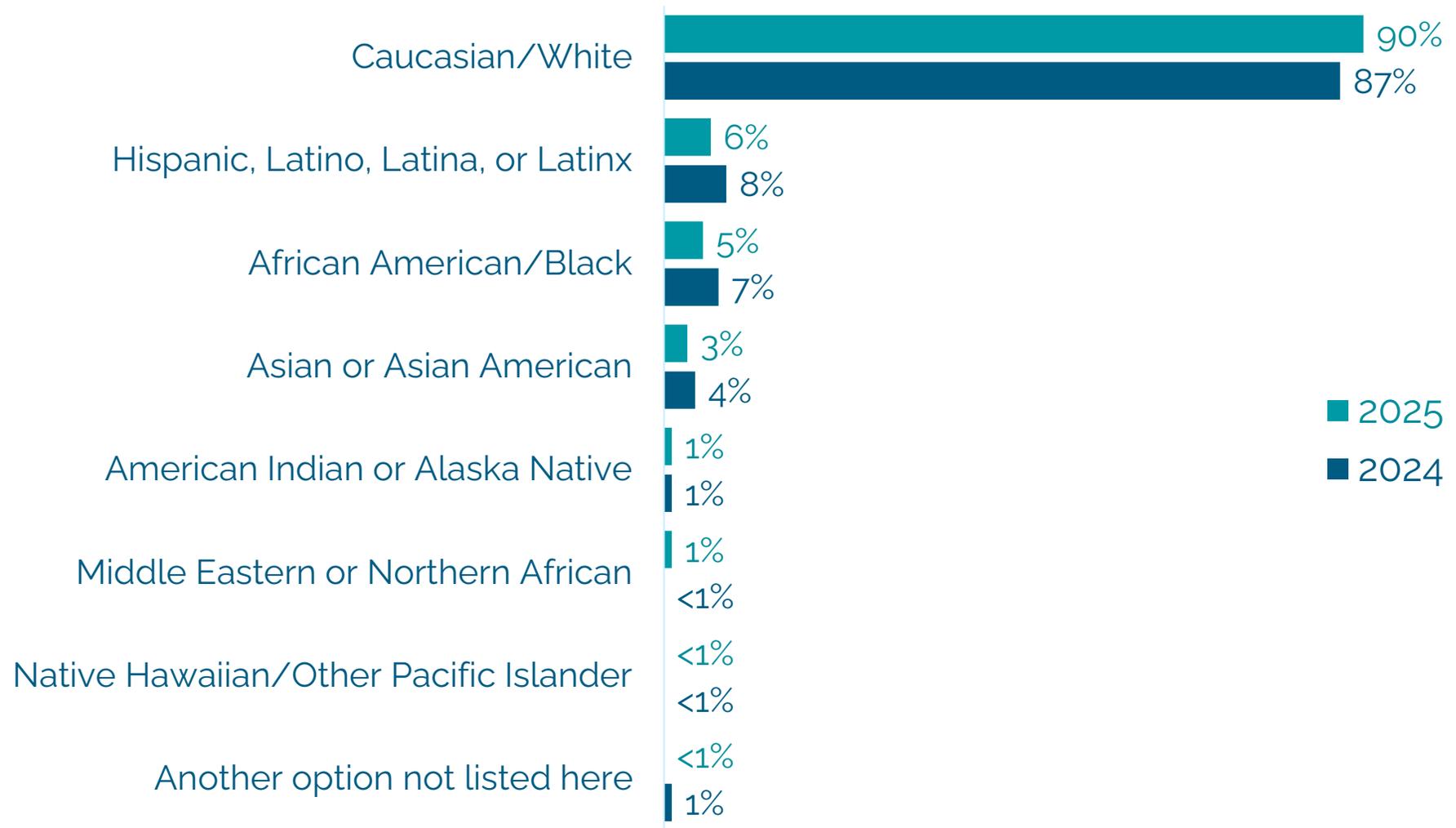


GENDER*

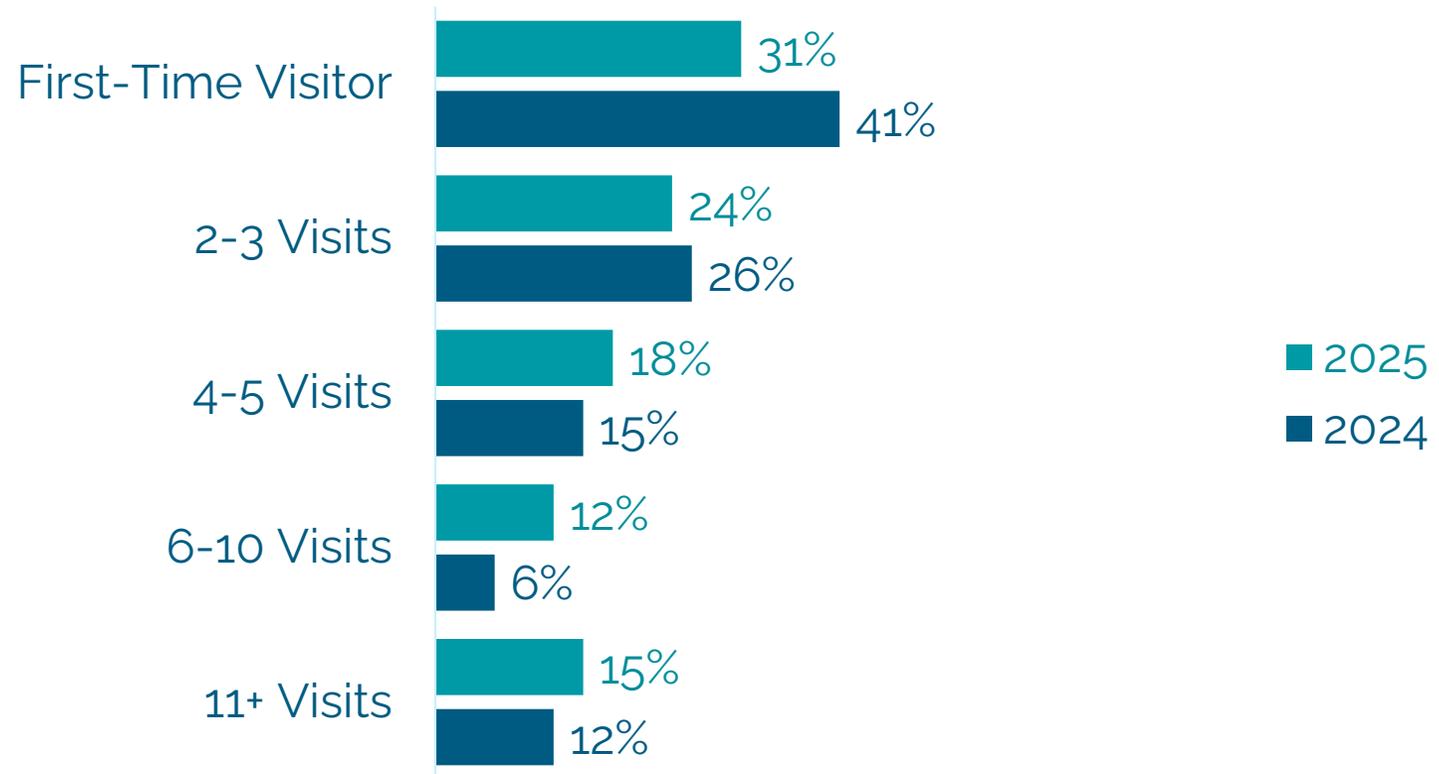


*Gender of member of travel party interviewed. May be influenced by visitors' willingness to complete a survey.

RACE*



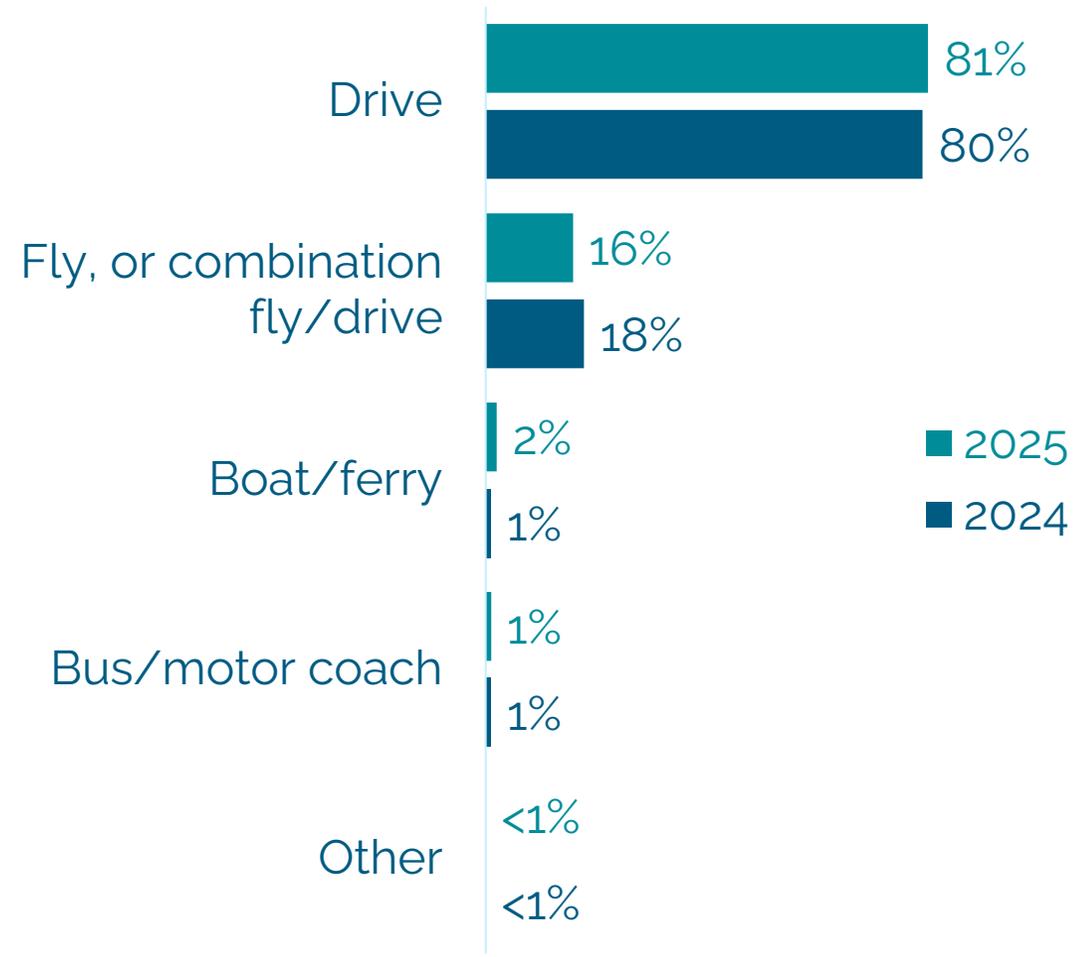
NEW & RETURNING VISITORS



VISITOR JOURNEY: TRIP EXPERIENCE

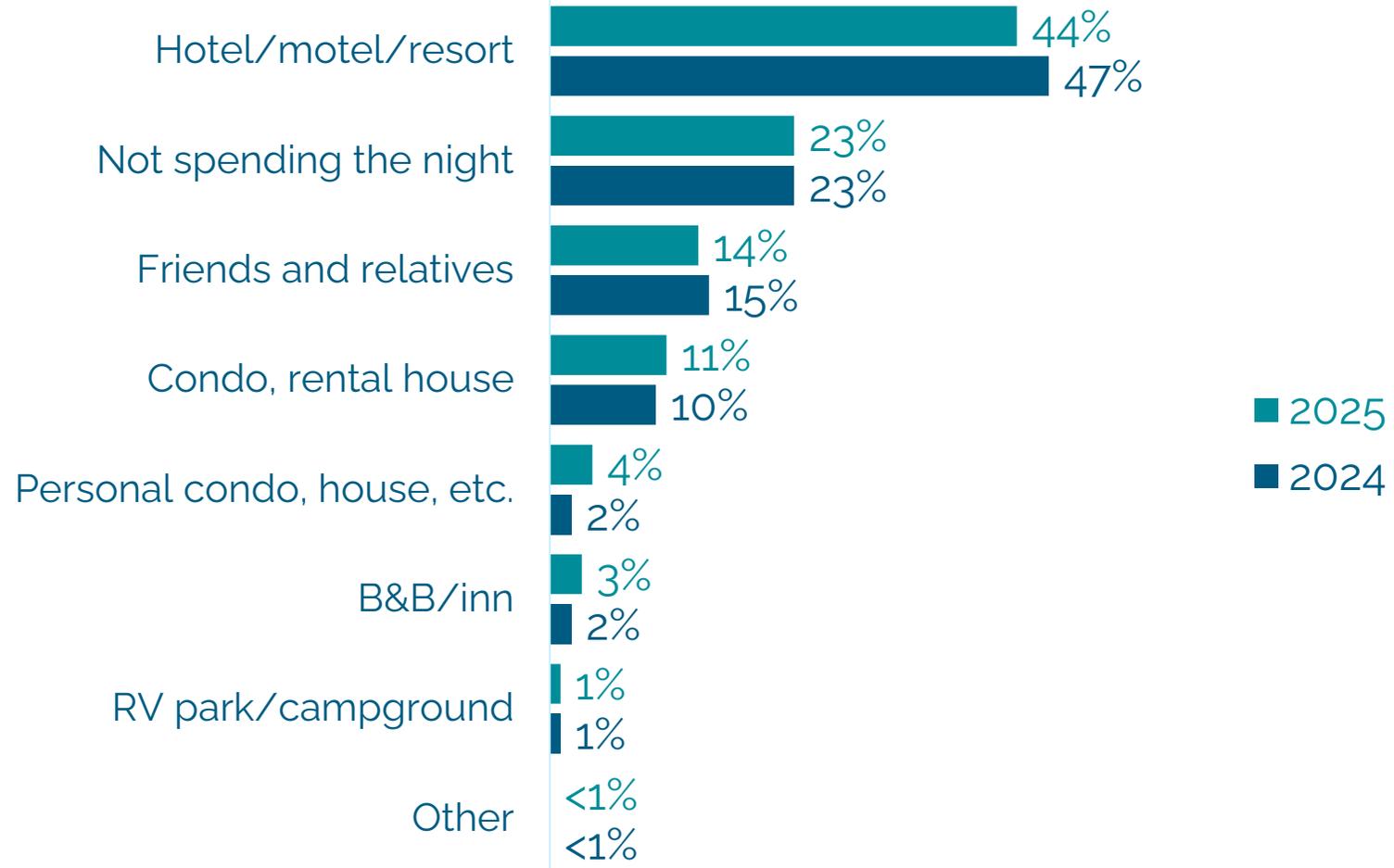


TRANSPORTATION



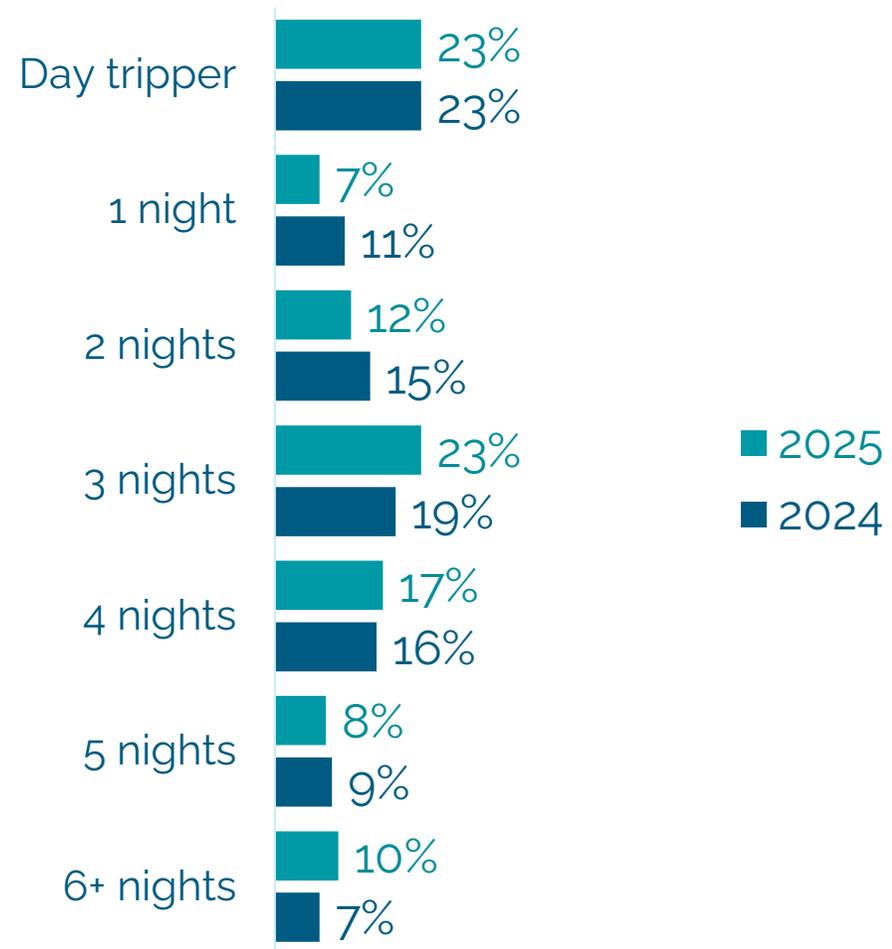
*13% of all visitors used the Jacksonville International Airport (-2% points from 2024).

ACCOMMODATIONS

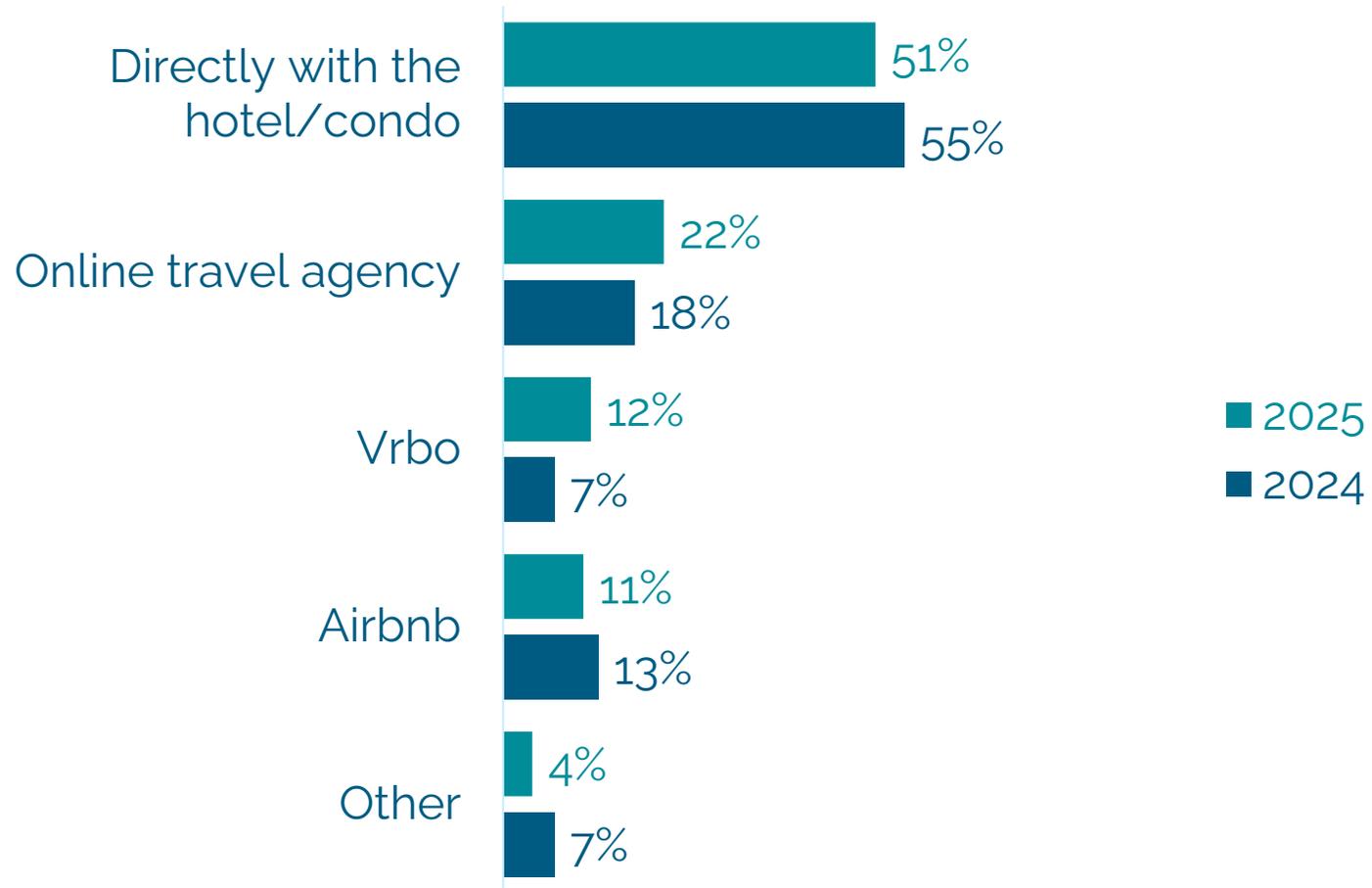


NIGHTS STAYED

Average nights stayed (all visitors): **3.3 (+0.3 from 2024)**
Average nights stayed (paid visitors): **3.9 (+0.4 from 2024)**



ACCOMMODATION BOOKING



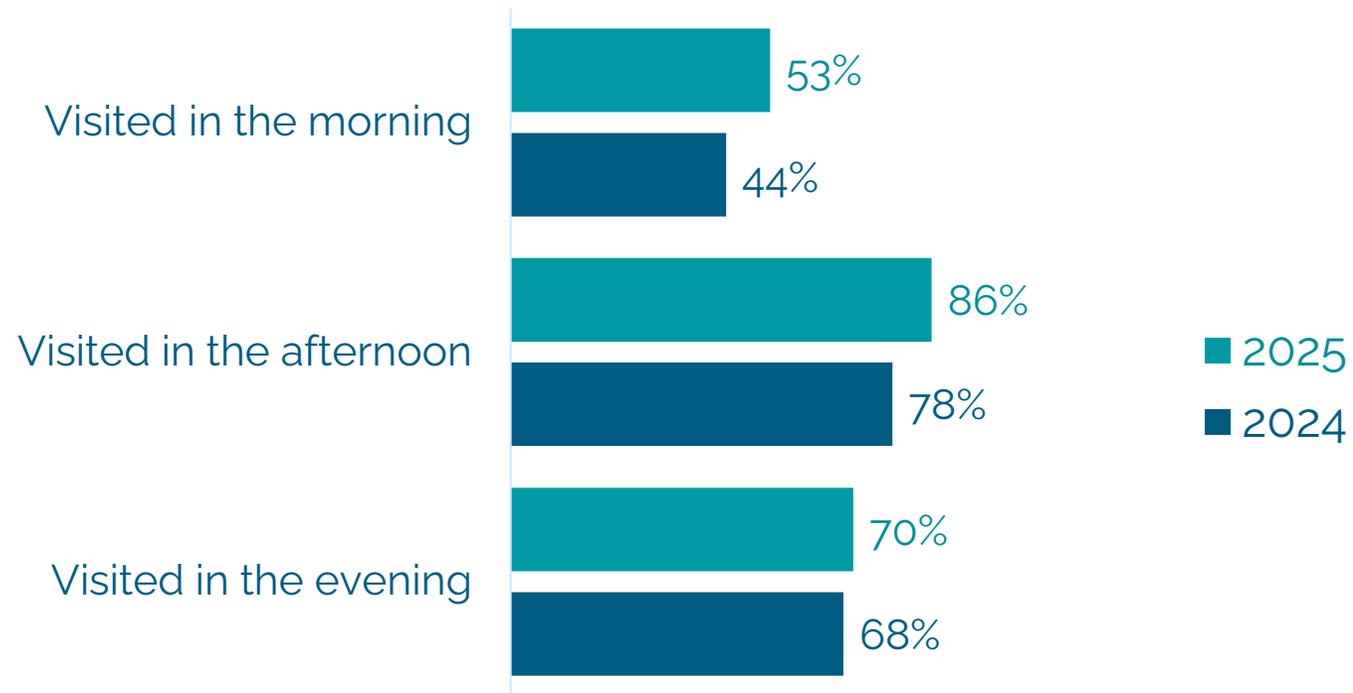
VISITOR ACTIVITIES*

Activity	2024	2025
Dining out	77%	77%
Historic Downtown Fernandina Beach	73%	75%
Shopping	59%	64%
Beach	60%	59%
Visit friends/relatives	28%	33%
Special events	33%	28%
Farmers market	19%	24%
Bars, nightclubs	18%	24%
Family time	20%	23%
Biking, hiking, running, etc.	12%	23%
Attractions	23%	22%
State parks	15%	14%
Art galleries, museums	10%	12%
Attend/participate in a sporting event	6%	10%
Golf or tennis	5%	10%
Water sports	6%	8%
Business meetings/conferences	9%	8%
Spas	4%	4%
Horseback riding	<1%	<1%
Other	<1%	3%

*Multiple responses permitted.

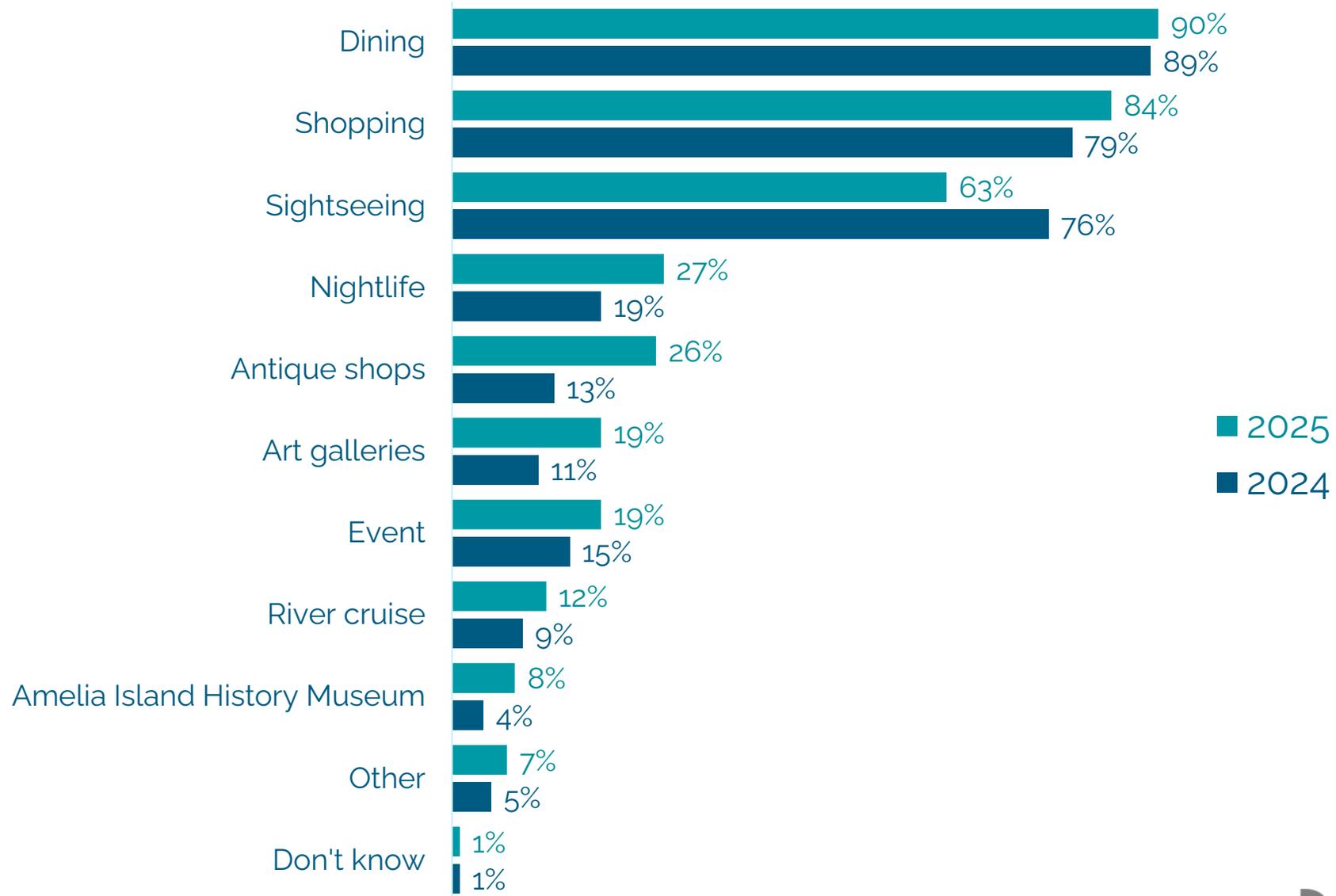
VISITING HISTORIC DOWNTOWN*

Average visits per trip: **2.5**
(same as 2024)



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

REASON FOR VISITING HISTORIC DOWNTOWN*

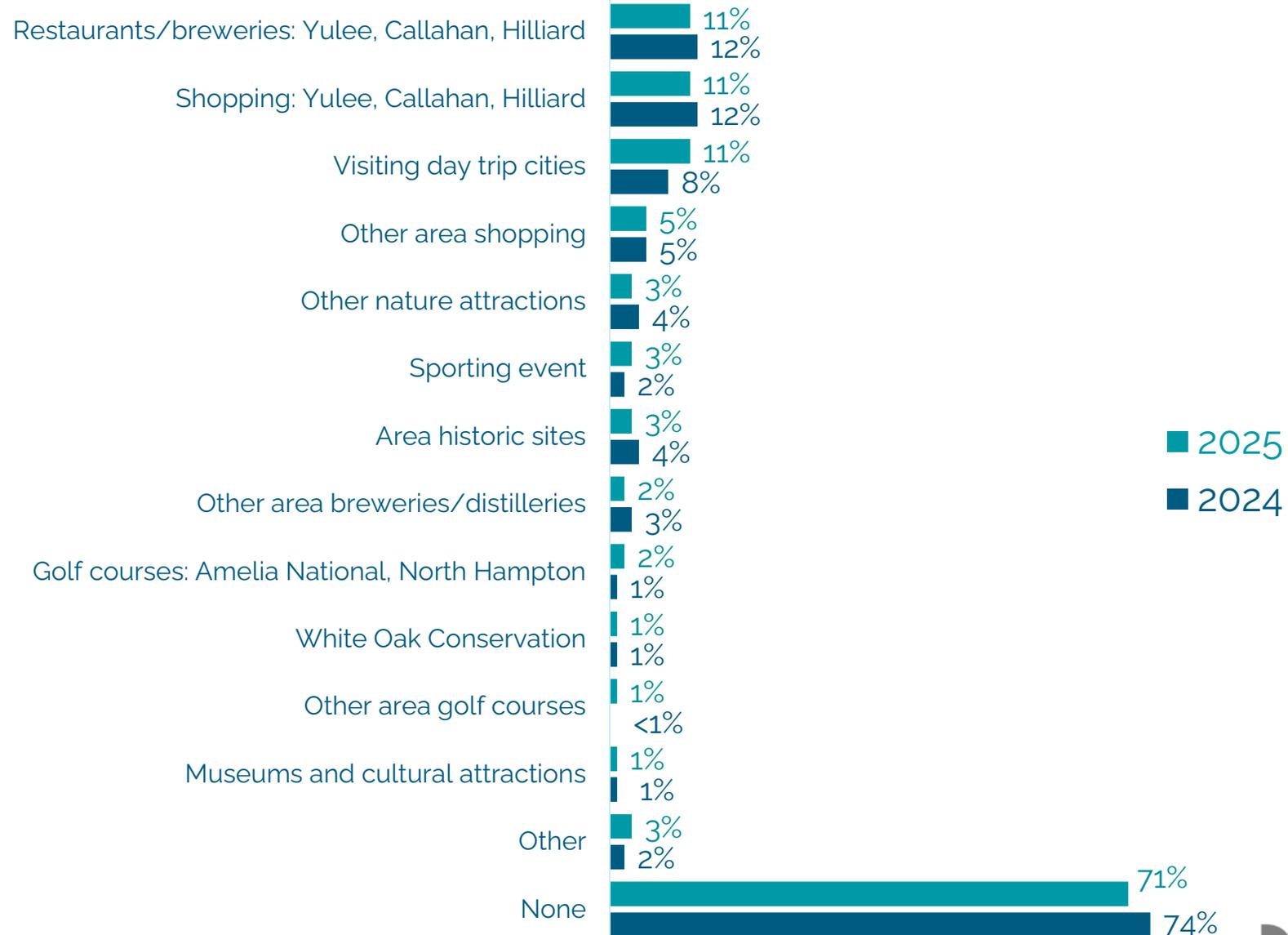


AREAS FOR IMPROVEMENT: DOWNTOWN*



- » Visitors love the tree lights, ice cream shops, and memorial benches
- » Ideas for improvement:
 - » Shuttles from nearby hotels
 - » More parking
 - » More play areas for kids
 - » More men's stores
 - » More breweries
 - » Food trucks
 - » More restrooms and comfort stations

OFF-ISLAND ACTIVITIES*



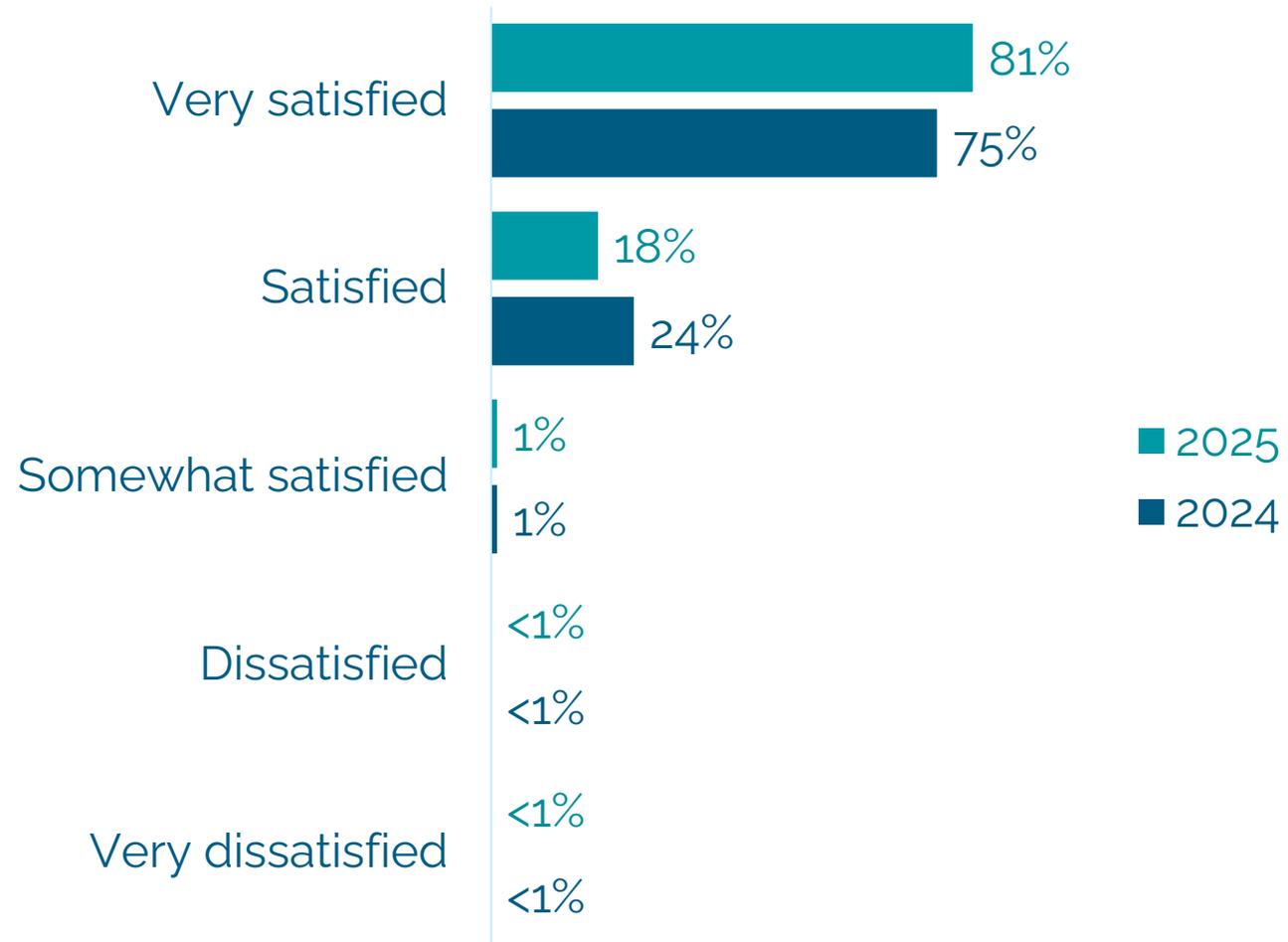
TRAVEL PARTY SPENDING

Category	Daily Spending		Total Spending	
	2024	2025	2024	2025
Accommodations	\$162	\$157	\$486	\$518
Restaurants	\$154	\$165	\$462	\$545
Groceries	\$34	\$34	\$102	\$112
Shopping	\$94	\$86	\$282	\$284
Activities & attractions	\$30	\$34	\$90	\$112
Transportation	\$34	\$29	\$102	\$96
Other	\$11	\$12	\$33	\$40
Total	\$519	\$517	\$1,557	\$1,706

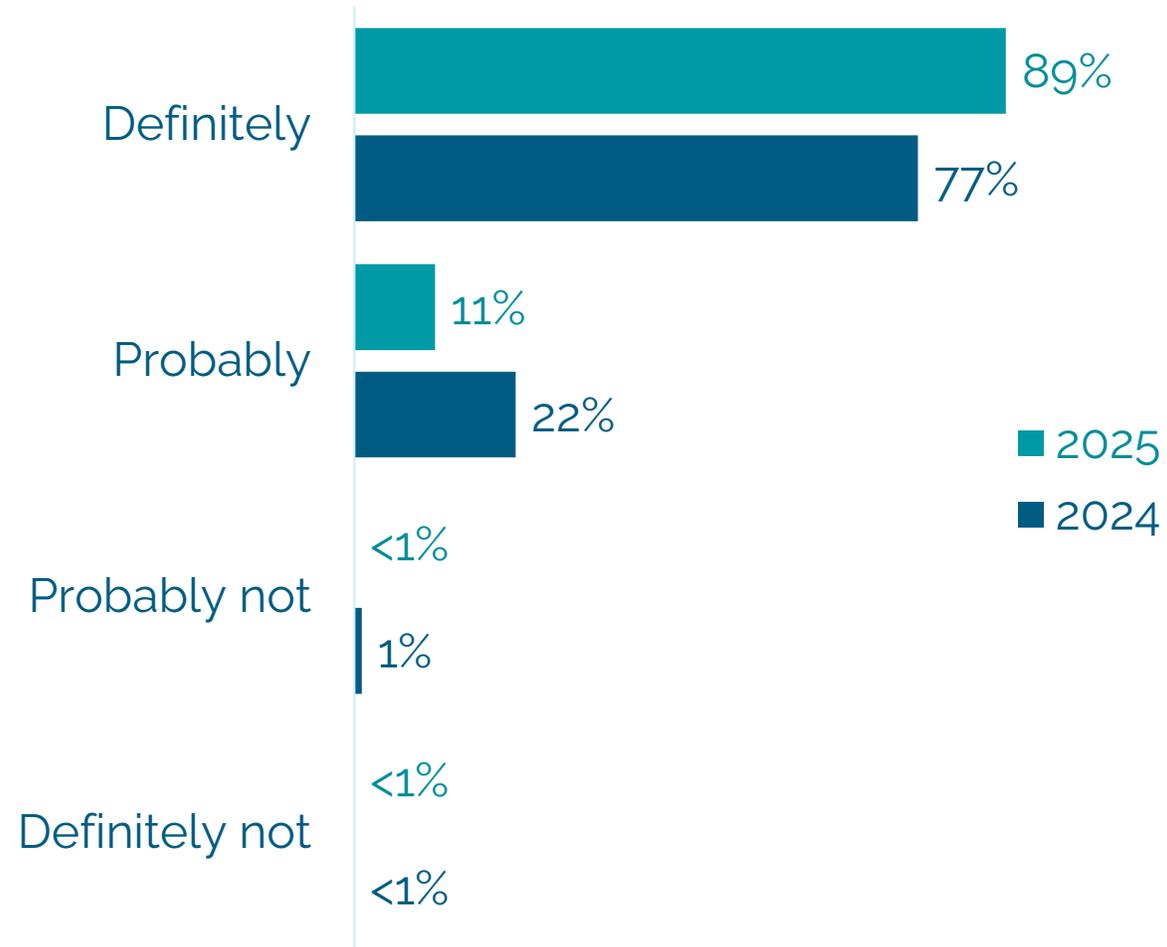
VISITOR JOURNEY: POST-TRIP



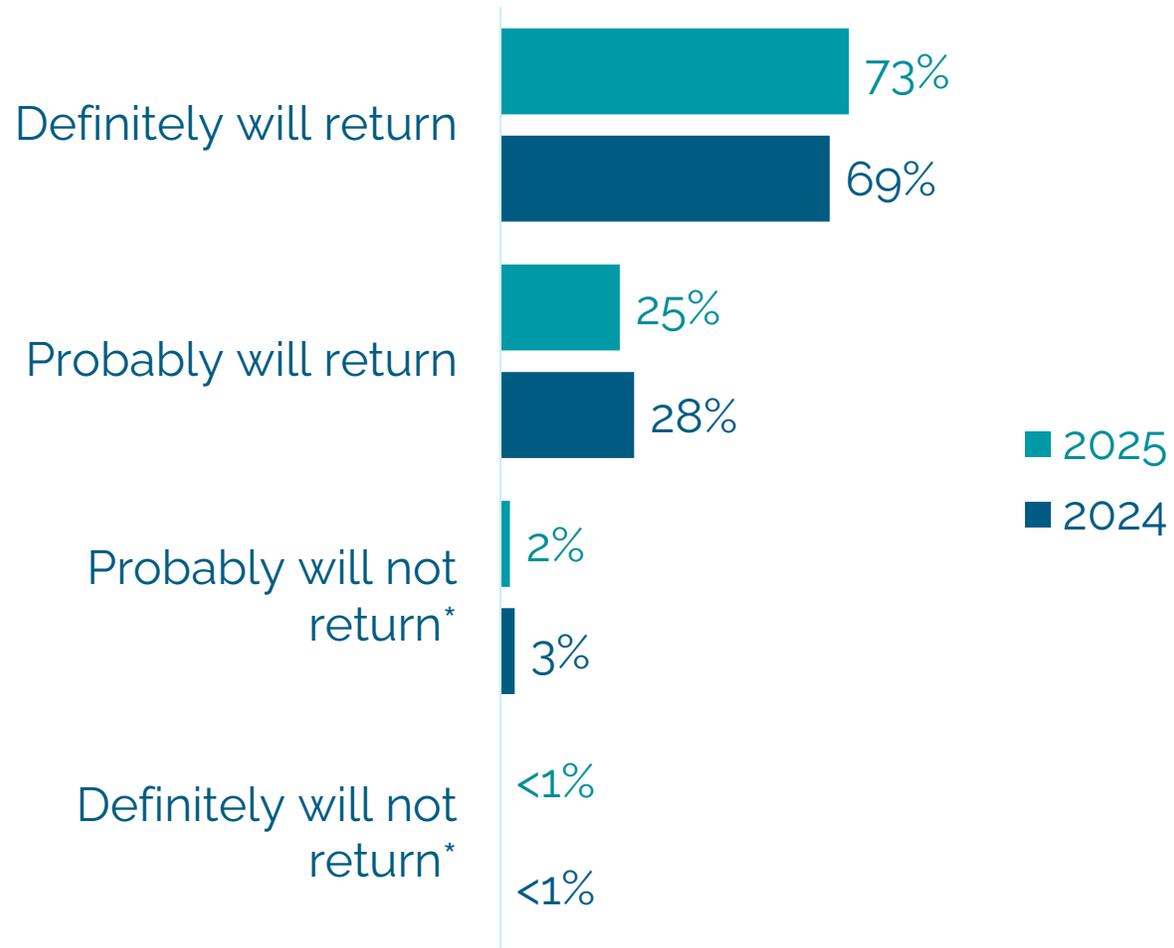
VISITOR SATISFACTION



RECOMMENDATION



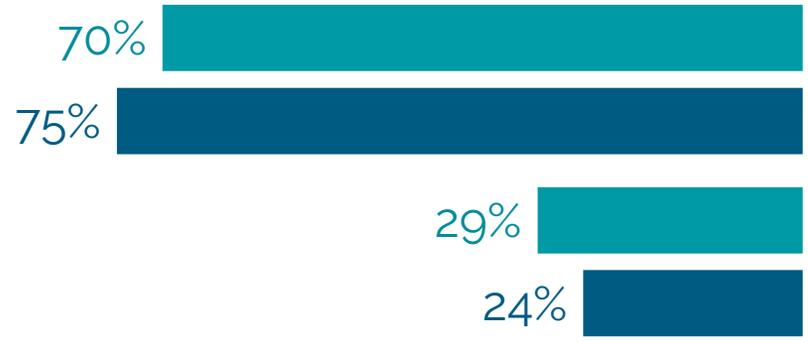
LIKELIHOOD OF RETURNING



*Top reasons for not returning were 1) a preference for variety in vacation spots, 2) only having gone for a specific occasion, and 3) difficulty getting to the area.

BEACH RATINGS

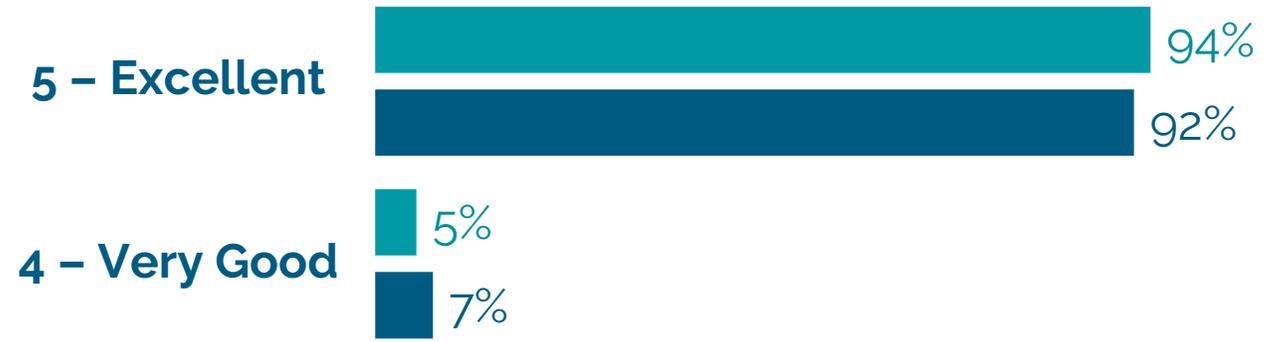
Overall Beach Rating



Mean **Overall** Rating:
4.7 (-0.1 from 2024)

■ 2025 ■ 2024

Beach Cleanliness Rating



Mean **Cleanliness** Rating:
4.98 (+0.03 from 2024)

■ 2025 ■ 2024

AREA DESCRIPTIONS*



- “A different world with a community vibe; beautiful in every way.”
- “Amazing to have so much on a small island, quaint and relaxing.”
- Beach life with just enough sophistication.”
- “Not many places like this in the U.S. anymore - charm, history beauty, and nice people.”
- “Like a Norman Rockwell Christmas!”
- “Spectacular sunrises and sunsets. The area has a calming effect that will help you deal with the outside world when you return.”
- “Has the best of all the surrounding beaches without overcrowding and overdevelopment.”

Amelia Island CVB

Visitor Tracking Study October – December 2025

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