

Amelia Island CVB

**Visitor Tracking Study
April – June 2026**

METHODOLOGY



Data Collection:

From April 1, 2026, to June 30, 2026, **548** 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 548 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 Q3 FY26¹

Direct spending increased YOY in Q3 FY2026 even as overall visitor number declined because a drop in lower-spending day trippers was offset by higher room rates, increased spending among unpaid visitors, and a longer average length of stay.



355,700

**Total
Visitors**

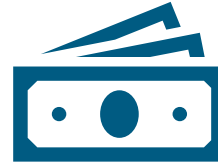
- 2.1% from FY25



234,000

**Room
Nights**

- 0.9% from FY25



\$234,521,800

**Direct
Spending**

+ 3.2% from FY25



65.7%

Occupancy²

- 5.5% from FY25

LODGING METRICS Q3 FY26

COMBINED



65.7%

Occupancy

- 5.5% from FY25



\$348.49

**Average
Daily Rate**

+ 3.8% from FY25



\$228.96

**Revenue Per
Available Room**

- 2.0% from FY25

Note: Airbnb (effective April 30, 2025) and Vrbo (effective May 30, 2025) 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.

HOTELS*



73.2%

Occupancy

- 0.8% from FY25



\$366.46

**Average
Daily Rate**

+ 6.7% from FY25



\$268.27

**Revenue Per
Available Room**

+ 5.9% from FY25

VACATION RENTALS**



55.9%

Occupancy

- 10.3% from FY25



\$325.00

**Average Daily
Rate**

+ 0.6% from FY25



\$181.68

**Revenue Per
Available Room**

- 9.7% from FY25

*Hotel source: Smith Travel Research

**Vacation rental source: Key Data

VISITOR PROFILE SUMMARY



VISITOR PROFILE Q3 FY26



49

Median Age

31%

First-Time Visitor

\$151,700

Median Household Income

\$554

Average Daily Travel Party Spend

3.1

Travel Party Size

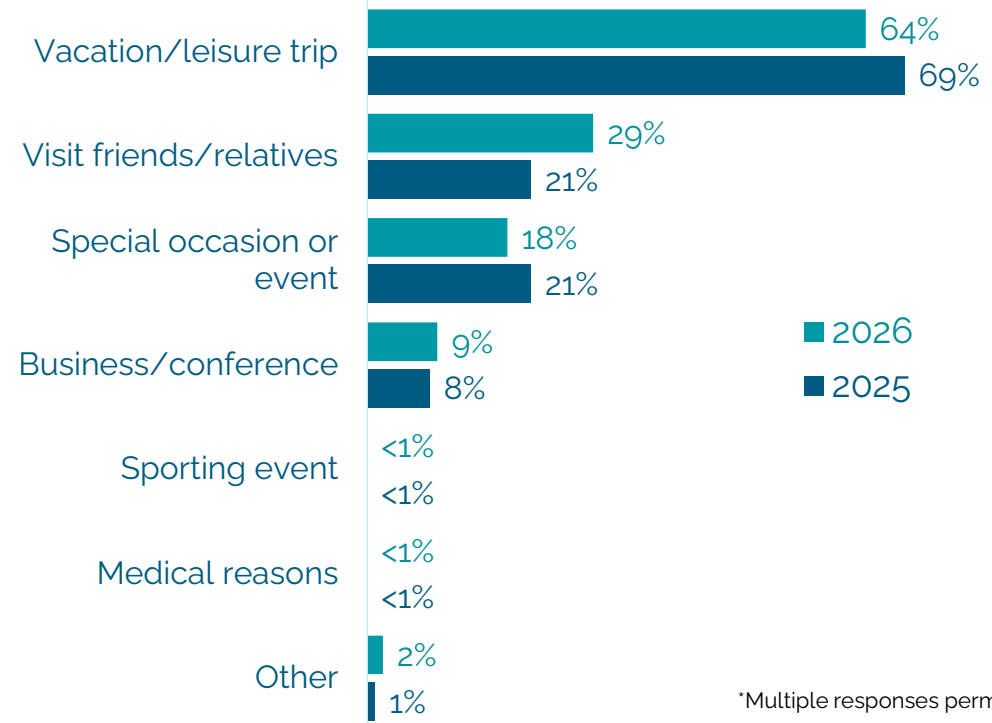
3.5

Length of Stay

MAIN REASONS FOR VISITING Q3 FY26*

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

- » Again this quarter, more visitors came to the area to spend time with friends or relatives compared to 2025
- » This quarter also saw the highest share of visitors coming to see friends or relatives compared to the rest of the year



*Multiple responses permitted.

ADVERTISING INFLUENCE*

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

- » **The share of visitors who recall seeing advertising for the area before their trip continues to decrease (-3% points from 2025)**
- » **Fewer visitors recalled seeing advertising on social media compared to last year**

Advertising Source	2025	2026
Online article	14%	14%
Amelia Island's social media	11%	6%
Traveler reviews/blogs	7%	4%
Magazine article	7%	3%
Ad on a website	7%	3%
Video streaming services	3%	2%
Magazine ad	5%	2%
Travel/visitor guide	4%	2%
Personal social media	5%	2%
Radio	<1%	1%
Podcast	3%	1%
Deal-based promotion	2%	1%
Billboard	<1%	<1%
Television	2%	<1%
Music streaming services	2%	<1%
Newspaper	<1%	<1%
Weather app	<1%	<1%
Rental agency/other booking website	<1%	<1%
AAA	<1%	<1%
Other	1%	<1%

*Based on visitors traveling for leisure.

ONLINE TRIP PLANNING SOURCES*

» **Online travel agencies were the top trip planning source for the second quarter in a row as visitors continue to travel cost-effectively**

» **Reliance on social media in trip planning is still trending down, while the use of AI is rising**

Online Planning Source	2025	2026
Online travel agency	22%	28%
Review website/app	21%	26%
Hotel websites/apps	25%	26%
Airbnb, Vrbo, etc.	26%	24%
Amelia Island social media	27%	22%
ChatGPT or other AI program	1%	12%
Online travel reviews, blogs, stories	9%	10%
Restaurant websites/apps	8%	10%
Mapping websites	4%	9%
AmeliaIsland.com	7%	6%
Personal social media	11%	5%
Amelia Island mobile app	2%	2%
Video streaming services	1%	1%
Music streaming services	1%	1%
Amelia Island rental companies	1%	1%
Airline websites/apps	3%	1%
Rental car websites/apps	2%	1%
Accessibility travel resource sites	<1%	<1%
Other	3%	4%
None	33%	32%

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

TOP ORIGIN MARKETS

Top Origin Markets – All Visitors

Market	2025	2026
Jacksonville ¹	20.9%	25.1%
Atlanta	9.0%	7.3%
Orlando-Daytona Beach-Melbourne	4.6%	5.1%
Savannah	3.2%	4.3%
New York City ²	3.9%	3.7%
Tampa-St. Petersburg	2.6%	2.7%
Charlotte	3.5%	2.5%
Greenville-Spartanburg-Asheville	1.8%	2.2%

Top Origin Markets – Overnight Visitors

Market	2025	2026
Jacksonville ¹	8.0%	10.8%
Atlanta	11.1%	9.3%
Orlando-Daytona Beach-Melbourne	4.2%	4.7%
New York City ²	4.8%	4.4%
Savannah	3.2%	4.2%
Tampa-St. Petersburg	2.7%	3.0%
Charlotte	4.0%	2.8%
Washington, DC-Hagerstown ³	2.4%	2.4%
Greenville-Spartanburg-Asheville	2.2%	2.0%
Tallahassee-Thomasville	1.9%	2.0%

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: Q3 FY26*



Reasons for Choosing Amelia Island

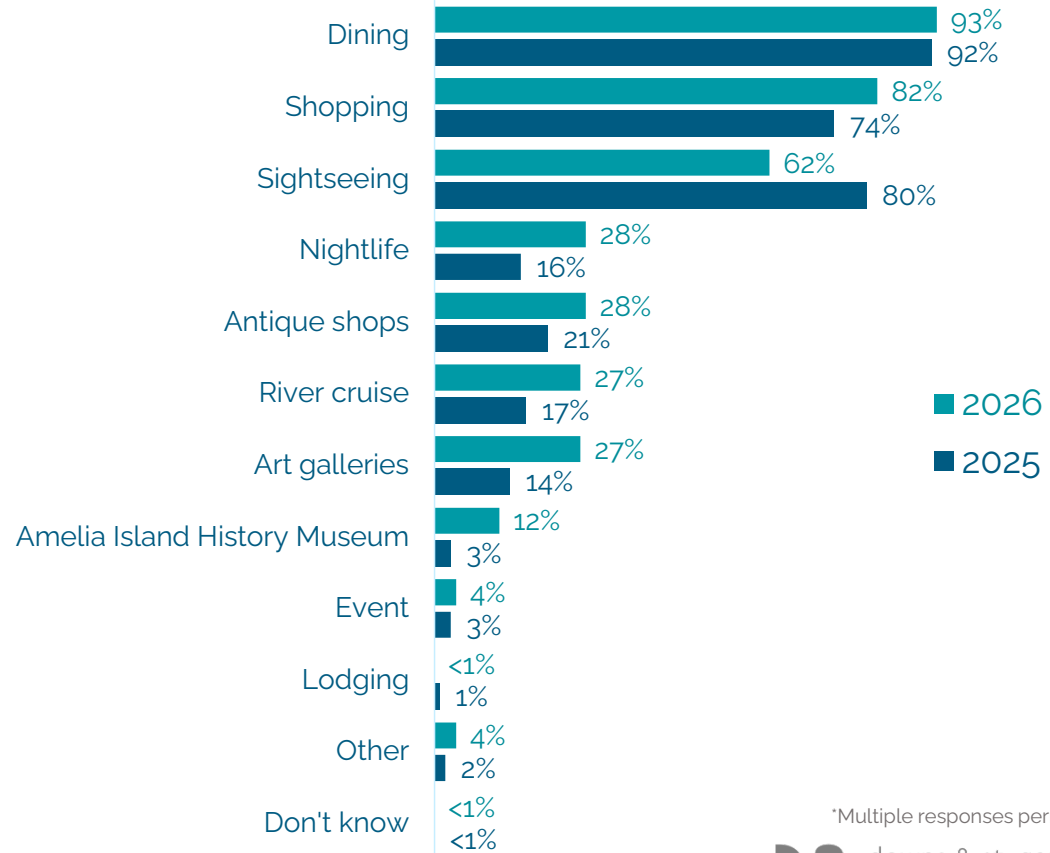
"The very nice mix of shops and good restaurants, all high-quality."

"We wanted to be on the beach in a smaller town, but be able to drive to nearby golf courses."

"We had not been here and it was highly recommended!"

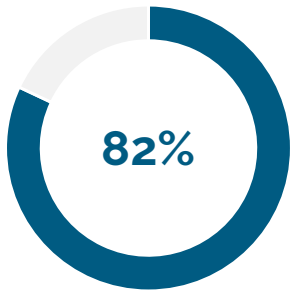
REASON FOR VISITING HISTORIC DOWNTOWN*

- » Visitors on average visited downtown as often as they did last year (2.3 days)
- » Like last quarter, their visits were more purpose-driven, with fewer coming just to sightsee and more coming because of a specific draw



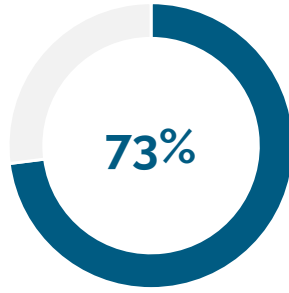
*Multiple responses permitted.

SATISFACTION STATISTICS Q3 FY26



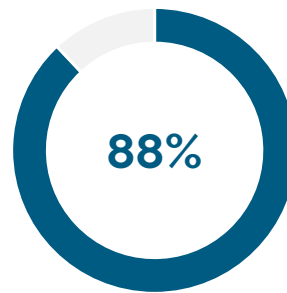
VERY SATISFIED

82% of visitors reported being very satisfied with their trip experience.



DEFINITELY RETURN

73% of visitors said they would definitely return to the area (+6% points from 2025).



DEFINITELY RECOMMEND

88% 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 4.8 out of 5.

STRAIGHT FROM YOUR VISITORS: Q3 FY26*



Describing Amelia Island

"If you stay a week, you will want 2 [weeks]; if you stay for 3 months, you will want 6 [months]; if you stay for any longer, you will want to move here!"

"It's less than an hour from us, but it feels so far away from the busyness of life."

"As we age, we continue to find things that pique our interest. This island is one of a kind."

VISITOR PROFILE INSIGHTS Q3 FY26

Insights

Again this quarter, more visitors came to the area to spend time with friends or relatives compared to 2025 and compared to other quarters of the year.

The share of visitors who recall seeing advertising for the area before their trip, as well as recall seeing advertising on social media, decreased.

Online travel agencies were the top trip planning source for the second quarter in a row as visitors continue to travel cost-effectively.

Reliance on social media in trip planning is still trending down, while the use of AI is rising.

Visitors on average visited downtown as often as they did last year (2.3 days), but their visits were more purpose-driven.

More visitors traveled from Orlando or Savannah compared to last year.

More visitors definitely plan to return to the Amelia Island area (+6% points from 2025).

DETAILED FINDINGS



VISITOR JOURNEY: KEY PERFORMANCE INDICATORS



TOURISM SNAPSHOT: KPIs

	April – June 2025	April – June 2026	% Δ
Visitors	363,300	355,700	- 2.1%
Visitor Days ¹	1,235,220	1,244,950	+ 0.8%
Direct Spending	\$227,184,500	\$234,521,800	+ 3.2%

	April – June 2025	April – June 2026	% Δ
Occupancy ^{2,3}	69.6%	65.7%	- 5.5%
ADR ²	\$335.87	\$348.49	+ 3.8%
RevPAR ²	\$233.59	\$228.96	- 2.0%
Room Nights ²	236,100	234,000	- 0.9%

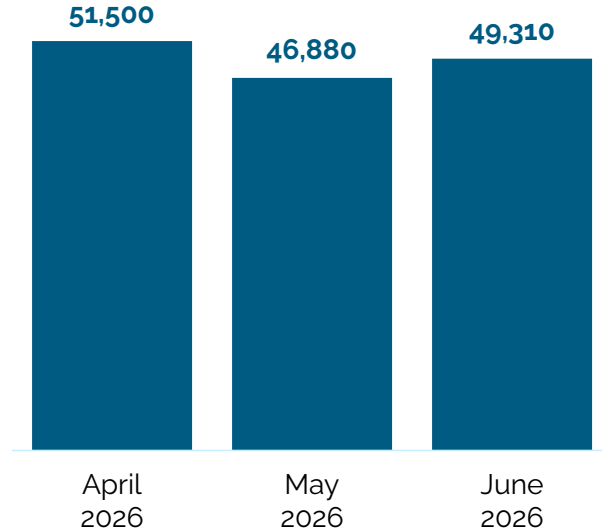
¹Visitor days increased despite a decrease in visitor number due to an increase in length of stay.

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

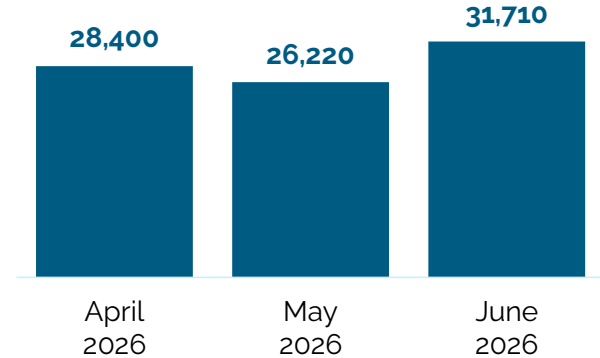
³Decrease in occupancy partially due to an increase in vacation rental units.

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	April Visitors	May Visitors	June Visitors
Hotel/motel/resort	43,080	37,940	41,250
Vacation rental	22,530	20,100	25,200
Non-paid accommodations*	31,740	27,960	30,400
Day tripper	26,600	23,430	25,470
Total	123,950	109,430	122,320

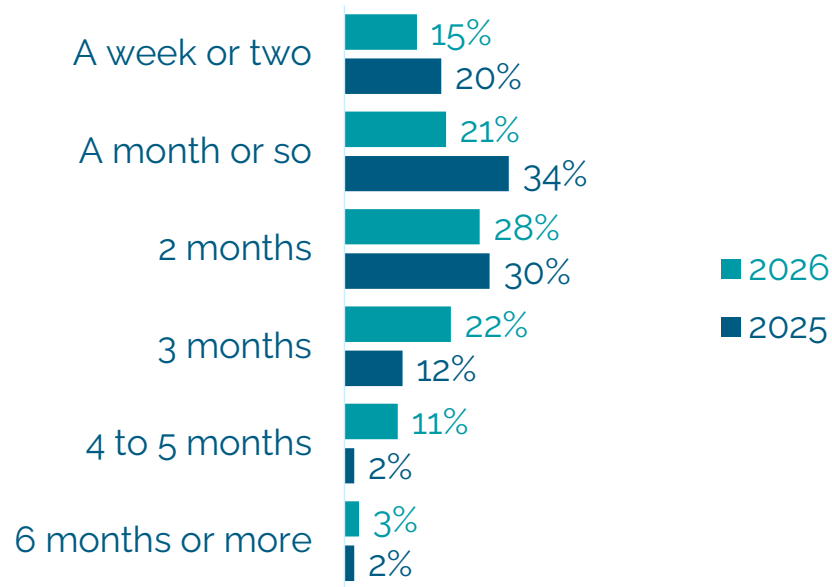
*Visitors staying with friends or relatives or in a second home.

VISITOR JOURNEY: PRE-VISIT



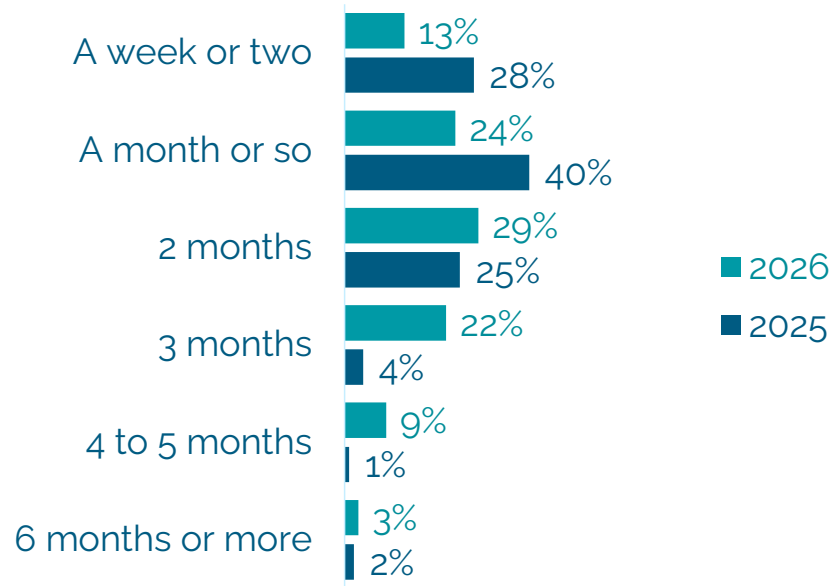
TRIP PLANNING CYCLE*

Average planning cycle: **64 days**



TRIP BOOKING CYCLE*

Average booking cycle: **62 days**

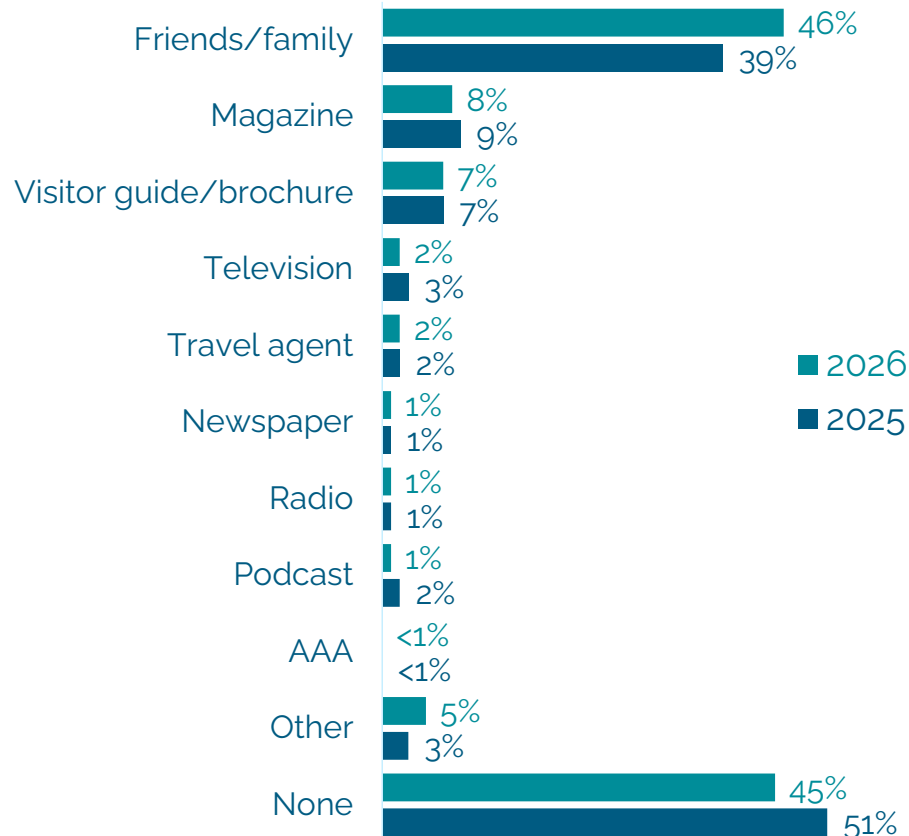


ONLINE TRIP PLANNING SOURCES*

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Mapping websites	4%	9%
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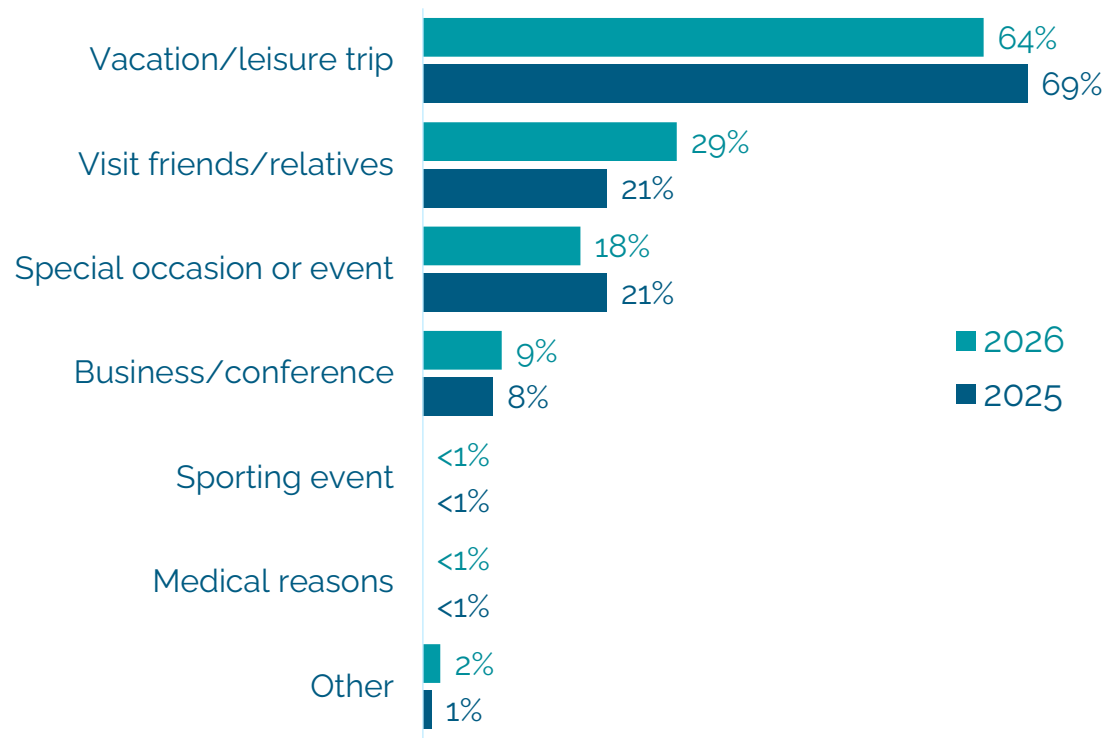
*Multiple responses permitted.
Based on visitors traveling for leisure.

OTHER TRIP PLANNING SOURCES*



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

REASONS FOR VISITING*



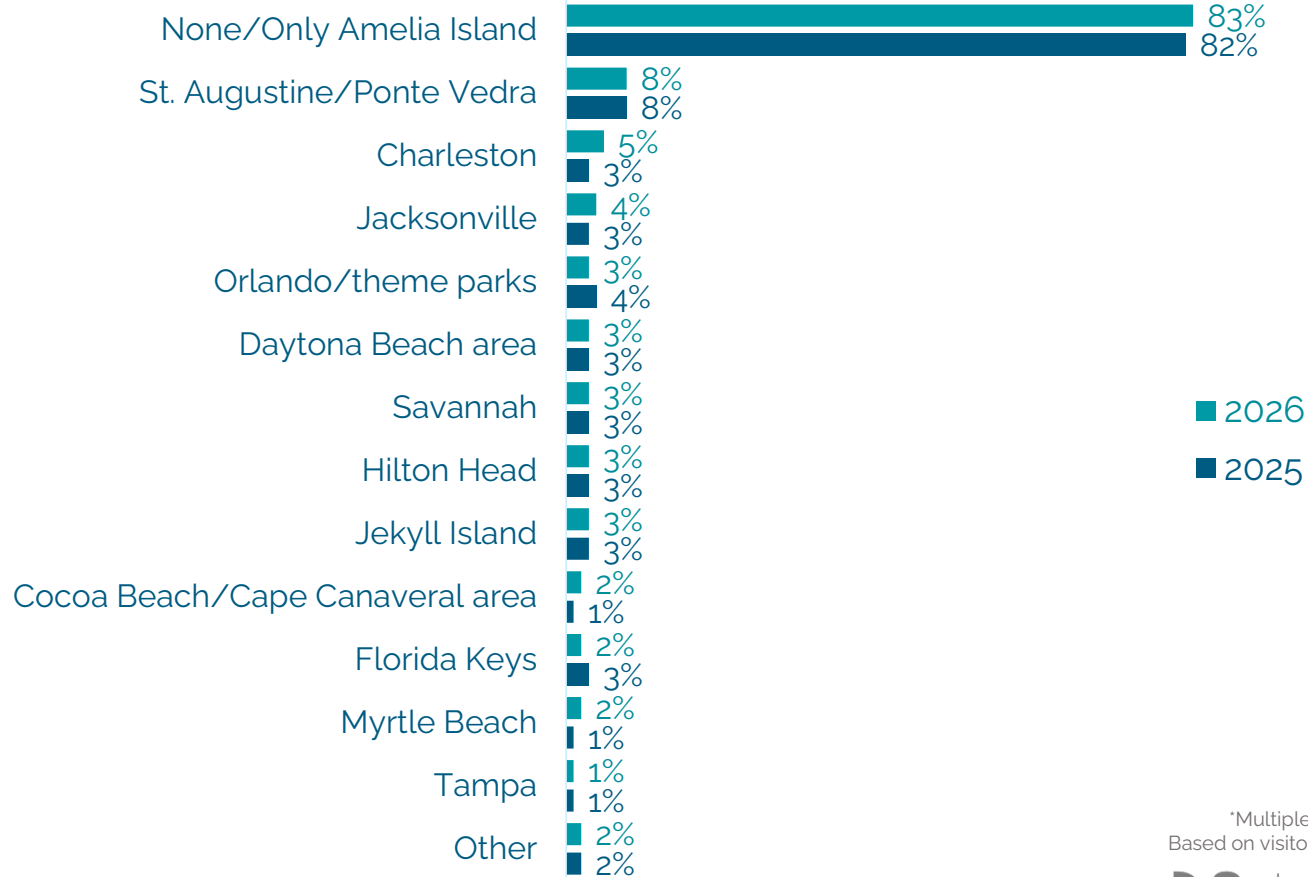
*Multiple responses permitted.

DETAILED REASONS FOR VISITING*

Main Reasons for Visiting	2025	2026
Beach trip	59%	54%
Visit friends or relatives	21%	29%
History	16%	17%
Shopping	17%	15%
Foodie/culinary	10%	9%
Wedding/honeymoon	7%	8%
Girls/guys trip	7%	6%
Company/government business	3%	5%
Conference/convention/trade show	4%	4%
Water sports	4%	4%
Nature, bird watching, eco tours, etc.	3%	4%
Golf or tennis	1%	3%
Birthday/anniversary	3%	2%
Festival	3%	2%
Reunion	1%	2%
Biking, hiking, running, etc.	2%	1%
Art galleries, museums, cultural events	1%	1%
Breweries/distilleries	1%	1%
Performing arts	1%	1%
Concert	<1%	<1%
Sporting event	<1%	<1%

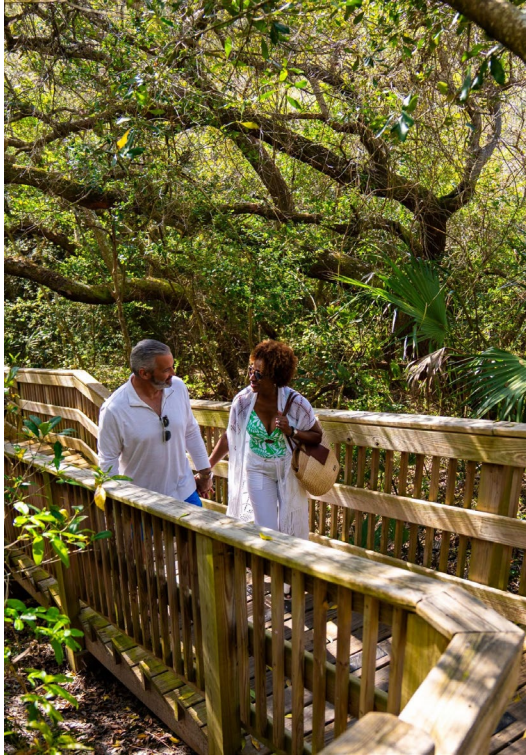
*Multiple responses permitted.
Based on all visitors traveling for leisure.

OTHER DESTINATIONS CONSIDERED*



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

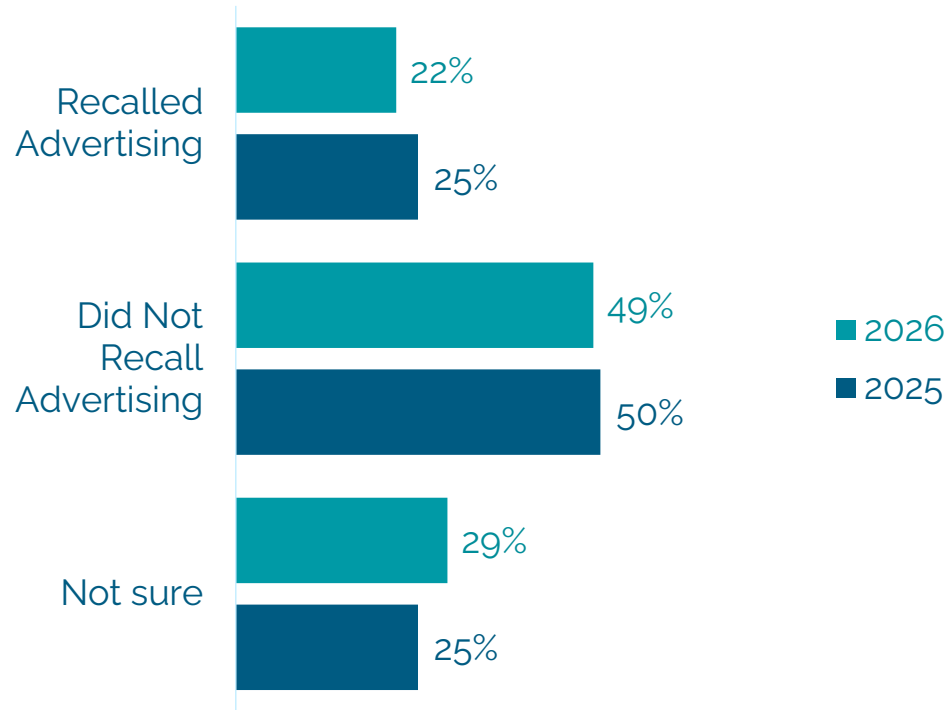
REASONS FOR CHOOSING AMELIA ISLAND*



- “We wanted to be on the beach in a smaller town, but be able to drive to nearby golf courses.”
- “We had not been here and it was highly recommended.”
- “We decided this was a good home base for exploring Jacksonville – too much congestion down there.”
- “We’re staying here before boarding a cruise!”
- “St. Augustine is overcrowded. This island has everything we need!”
- “It’s more compact and more peaceful than other golf destinations.”
- “The very nice mix of shops and good restaurants, all high-quality.”
- “We stopped here on our way home to see Fort Clinch!”

*Open-ended responses. Multiple responses permitted.

ADVERTISING RECALL*



ADVERTISING SOURCES*

Advertisements influenced **12%** of **all leisure visitors** to visit the Amelia Island area (**-1% points from 2025**).

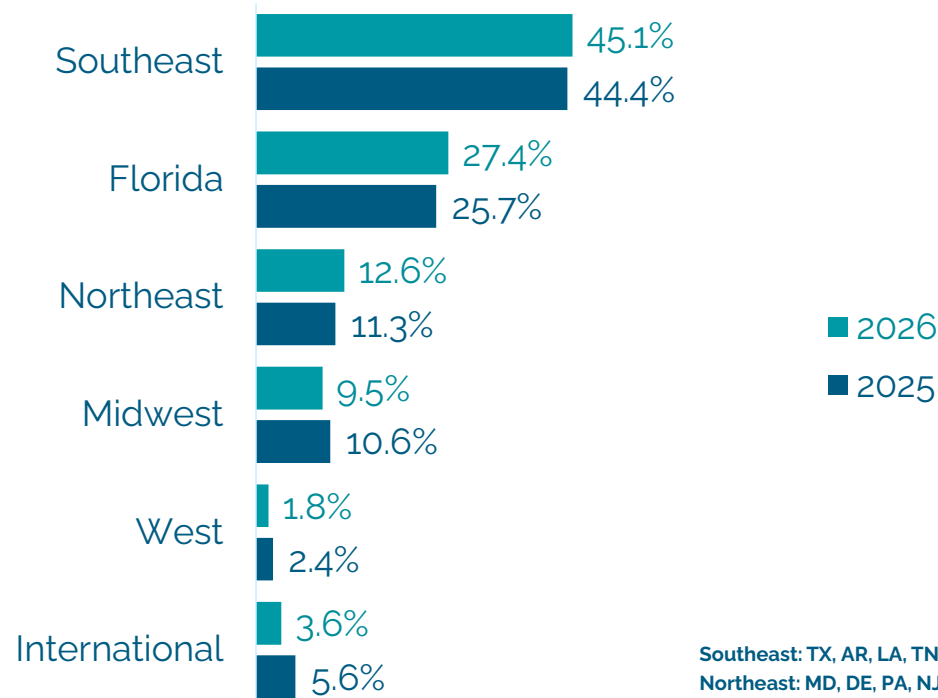
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Billboard	<1%	<1%
Television	2%	<1%
Music streaming services	2%	<1%
Newspaper	<1%	<1%
Weather app	<1%	<1%
Rental agency/other booking website	<1%	<1%
AAA	<1%	<1%
Other	1%	<1%

*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%; -0.9% points from 2025).

TOP ORIGIN STATES

State	2025	2026
Florida	25.7%	27.4%
Georgia	23.9%	24.8%
South Carolina	4.7%	5.7%
North Carolina	5.5%	4.7%
New York	3.0%	3.5%
Tennessee	3.2%	3.0%
Ohio	3.1%	2.4%
Virginia	2.1%	2.3%
Pennsylvania	1.6%	2.0%



TOP ORIGIN MARKETS

Top Origin Markets – All Visitors

Market	2025	2026
Jacksonville ¹	20.9%	25.1%
Atlanta	9.0%	7.3%
Orlando-Daytona Beach-Melbourne	4.6%	5.1%
Savannah	3.2%	4.3%
New York City ²	3.9%	3.7%
Tampa-St. Petersburg	2.6%	2.7%
Charlotte	3.5%	2.5%
Greenville-Spartanburg-Asheville	1.8%	2.2%

Top Origin Markets – Overnight Visitors

Market	2025	2026
Jacksonville ¹	8.0%	10.8%
Atlanta	11.1%	9.3%
Orlando-Daytona Beach-Melbourne	4.2%	4.7%
New York City ²	4.8%	4.4%
Savannah	3.2%	4.2%
Tampa-St. Petersburg	2.7%	3.0%
Charlotte	4.0%	2.8%
Washington, DC-Hagerstown ³	2.4%	2.4%
Greenville-Spartanburg-Asheville	2.2%	2.0%
Tallahassee-Thomasville	1.9%	2.0%

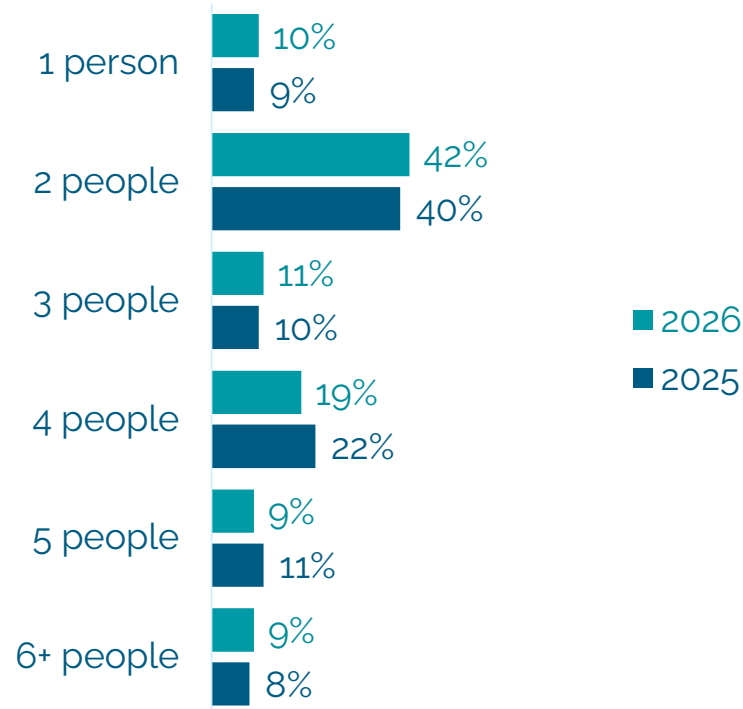
¹Includes Jacksonville, FL and Brunswick, GA.

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

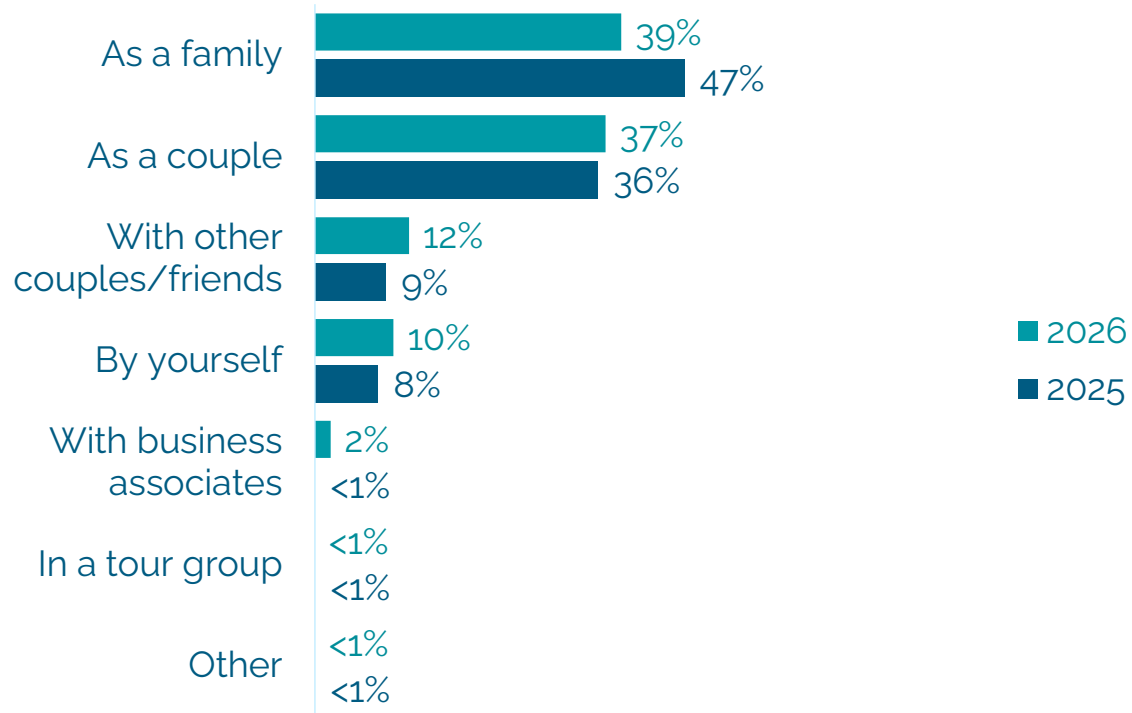
³Includes parts of Maryland, Virginia, West Virginia, and Pennsylvania.

TRAVEL PARTY SIZE

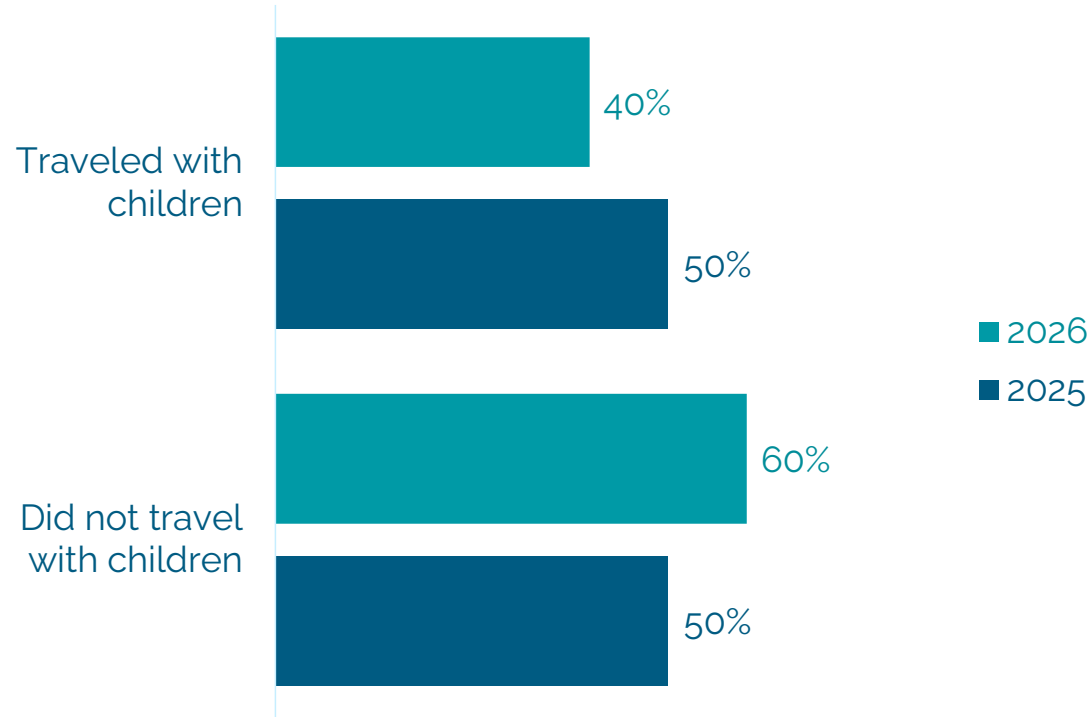
Average travel party size: **3.1**
(-0.1 from 2025)



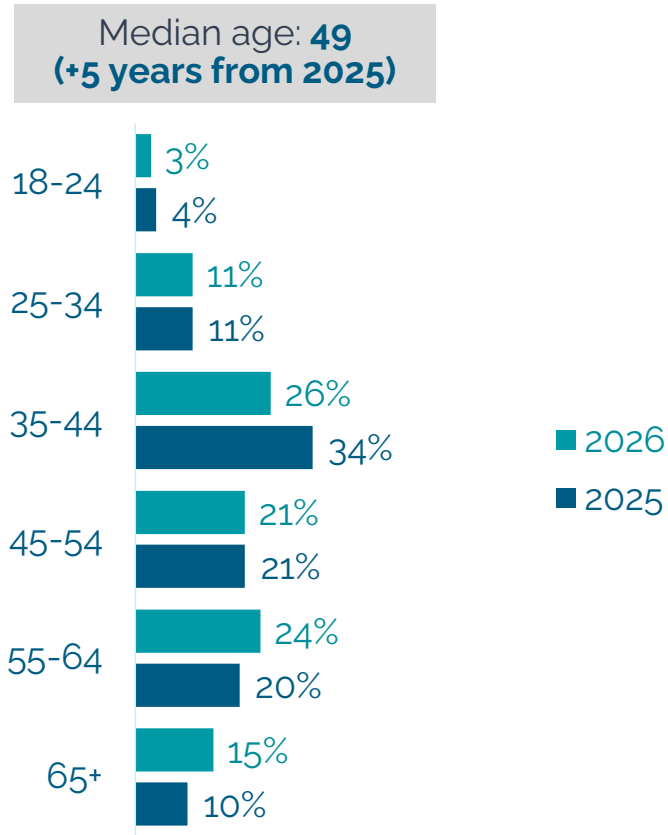
TRAVEL PARTY TYPE



TRAVELED WITH CHILDREN

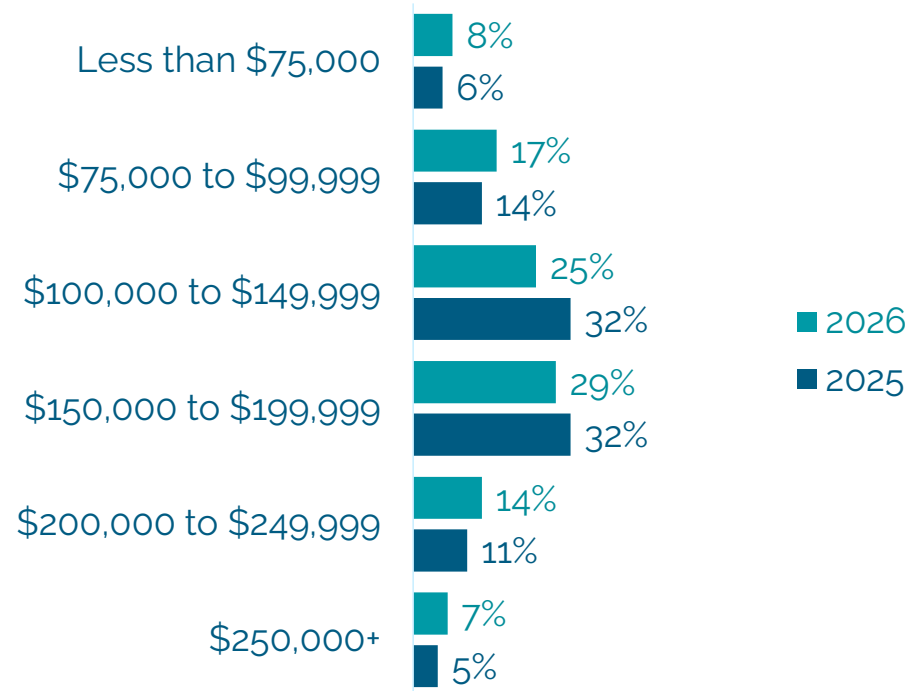


AGE

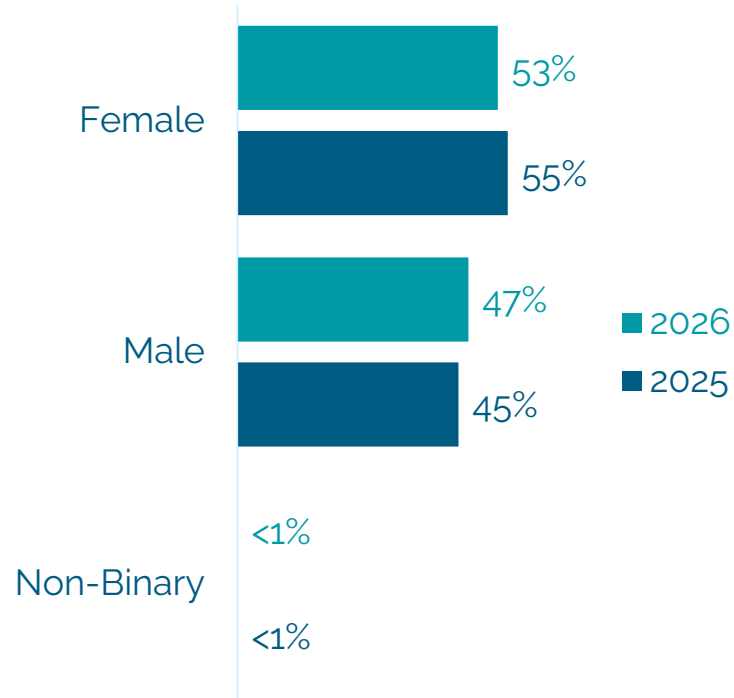


HOUSEHOLD INCOME

Median household income: **\$151,700**
(+ \$4,700 from 2025)

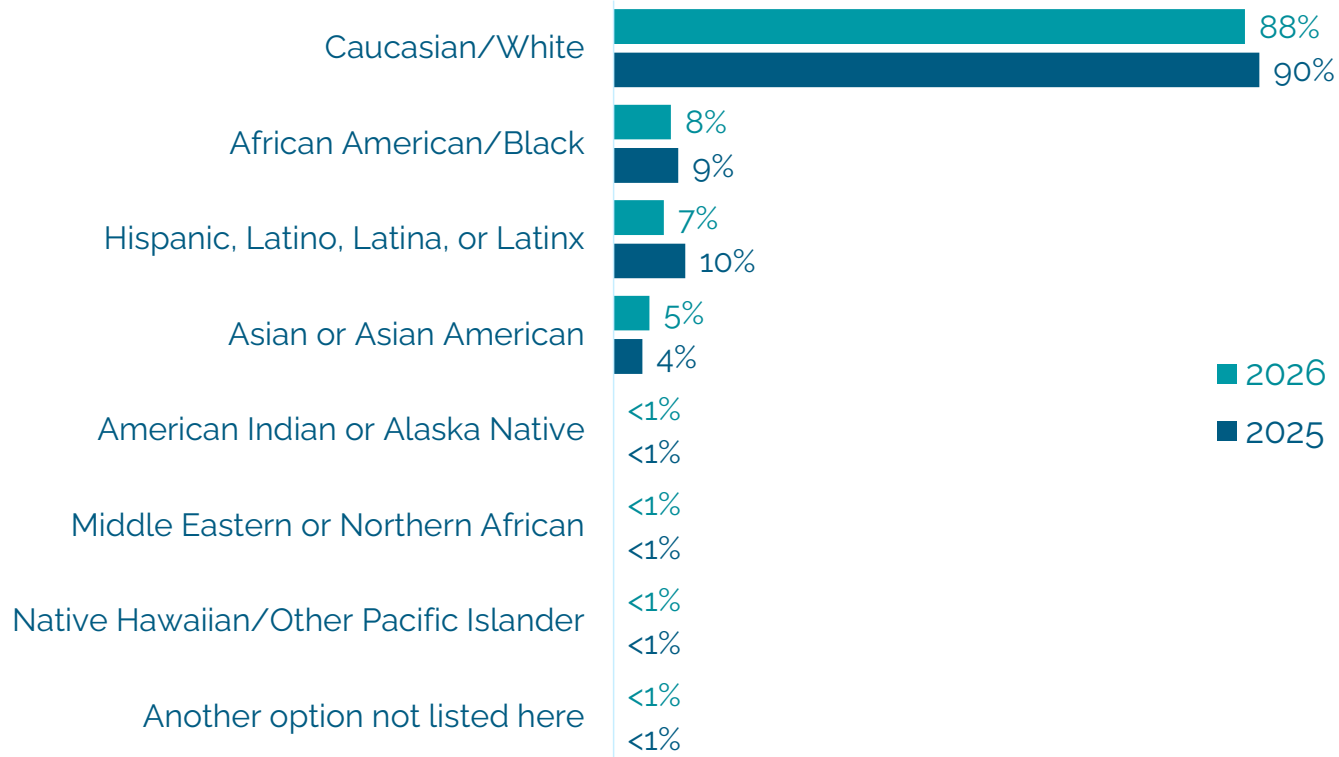


GENDER*

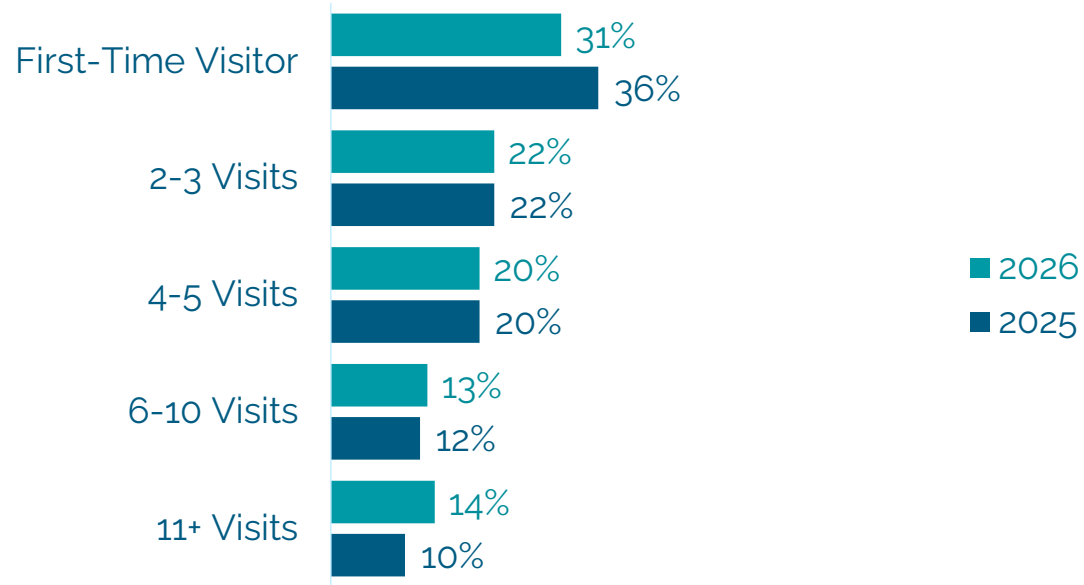


*Gender of member of travel party interviewed.
May be influenced by visitors' willingness to complete a survey.

RACE*



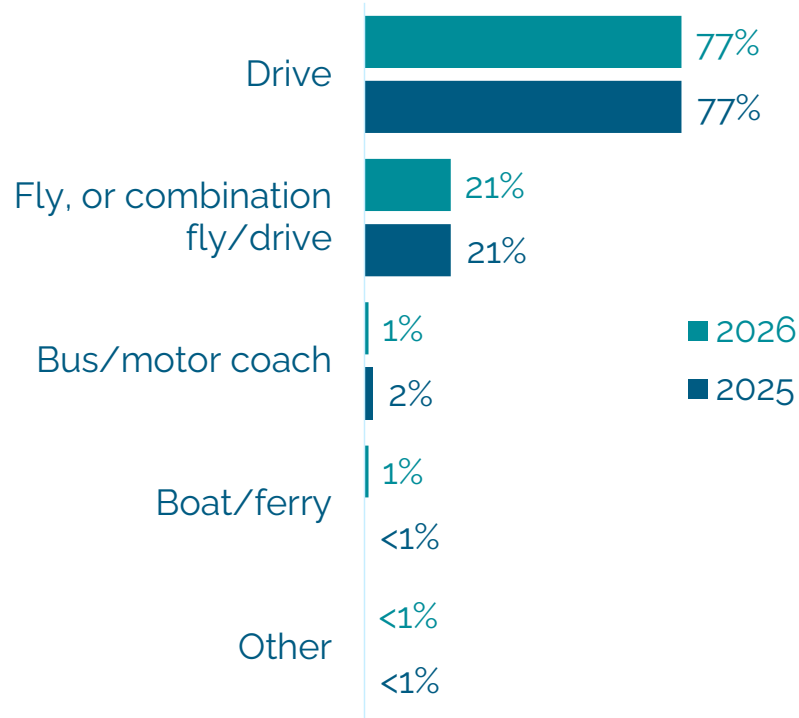
NEW & RETURNING VISITORS



VISITOR JOURNEY: TRIP EXPERIENCE

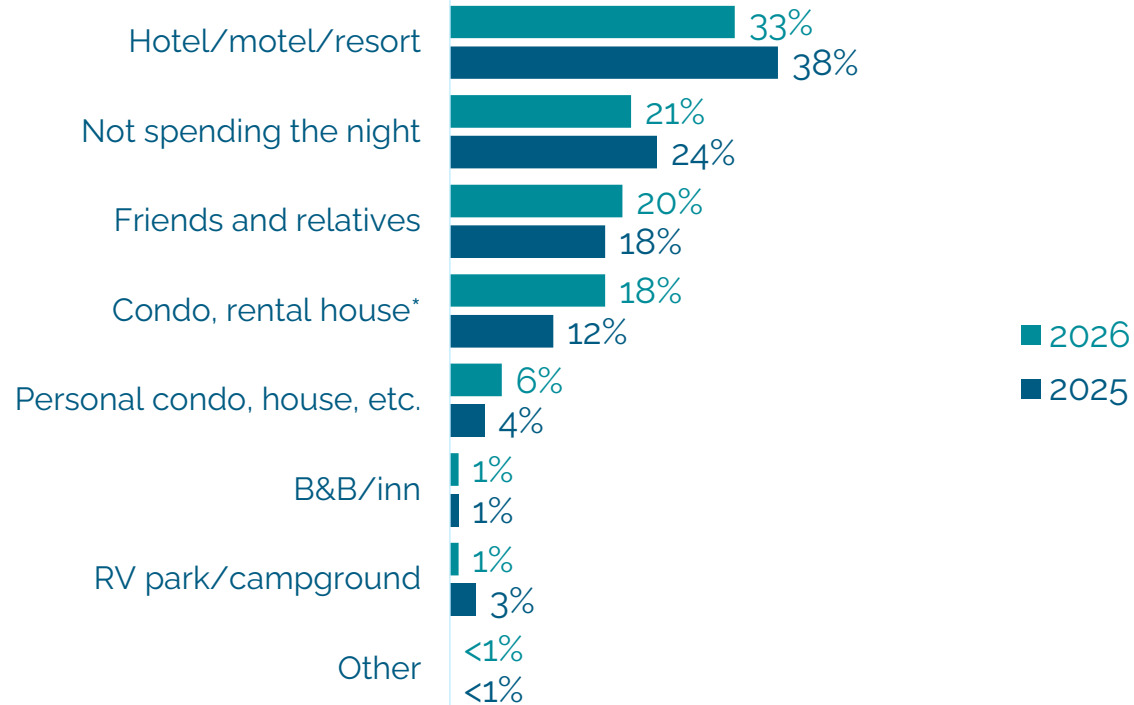


TRANSPORTATION



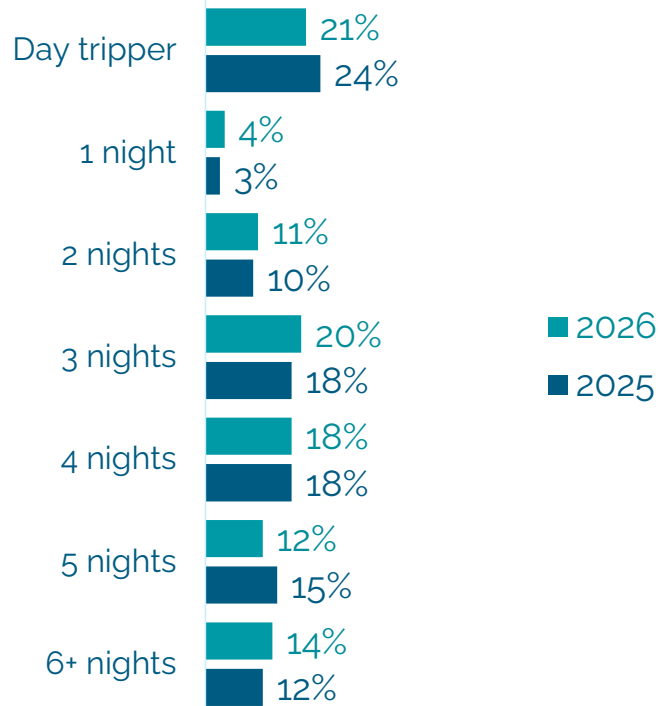
*19% of all visitors used the Jacksonville International Airport (~2% points from 2025).

ACCOMMODATIONS

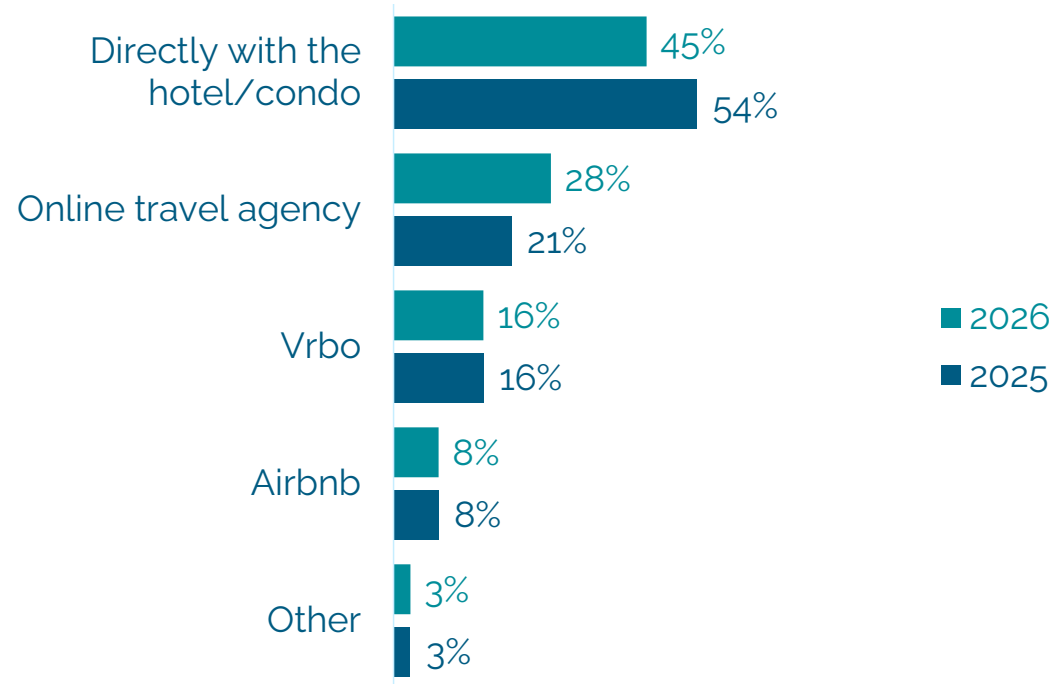


NIGHTS STAYED

Average nights stayed (all visitors): **3.5 (+0.1 from 2025)**
Average nights stayed (paid visitors): **4.0 (-0.1 from 2025)**



ACCOMMODATION BOOKING



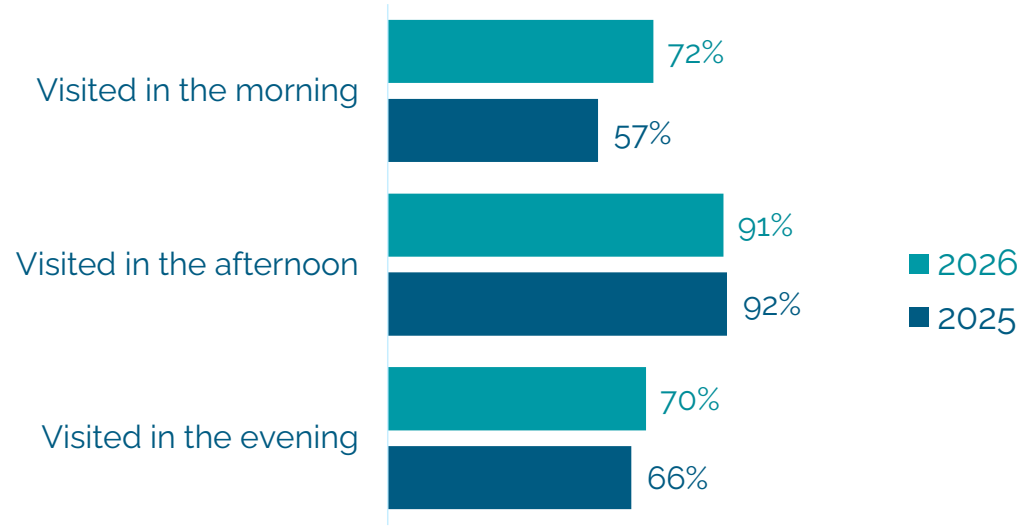
VISITOR ACTIVITIES*

Activity	2025	2026
Dining out	82%	78%
Historic Downtown Fernandina Beach	79%	75%
Beach	77%	74%
Shopping	62%	63%
Visit friends/relatives	28%	37%
Farmers market	21%	28%
Family time	21%	25%
Biking, hiking, running, etc.	23%	25%
Attractions	24%	23%
Bars, nightclubs	12%	21%
Golf or tennis	8%	15%
State parks	11%	14%
Water sports	9%	11%
Business meetings/conferences	6%	7%
Art galleries, museums	6%	7%
Spas	4%	6%
Special events	6%	5%
Attend/participate in a sporting event	3%	2%
Horseback riding	1%	1%
Other	2%	3%

*Multiple responses permitted.

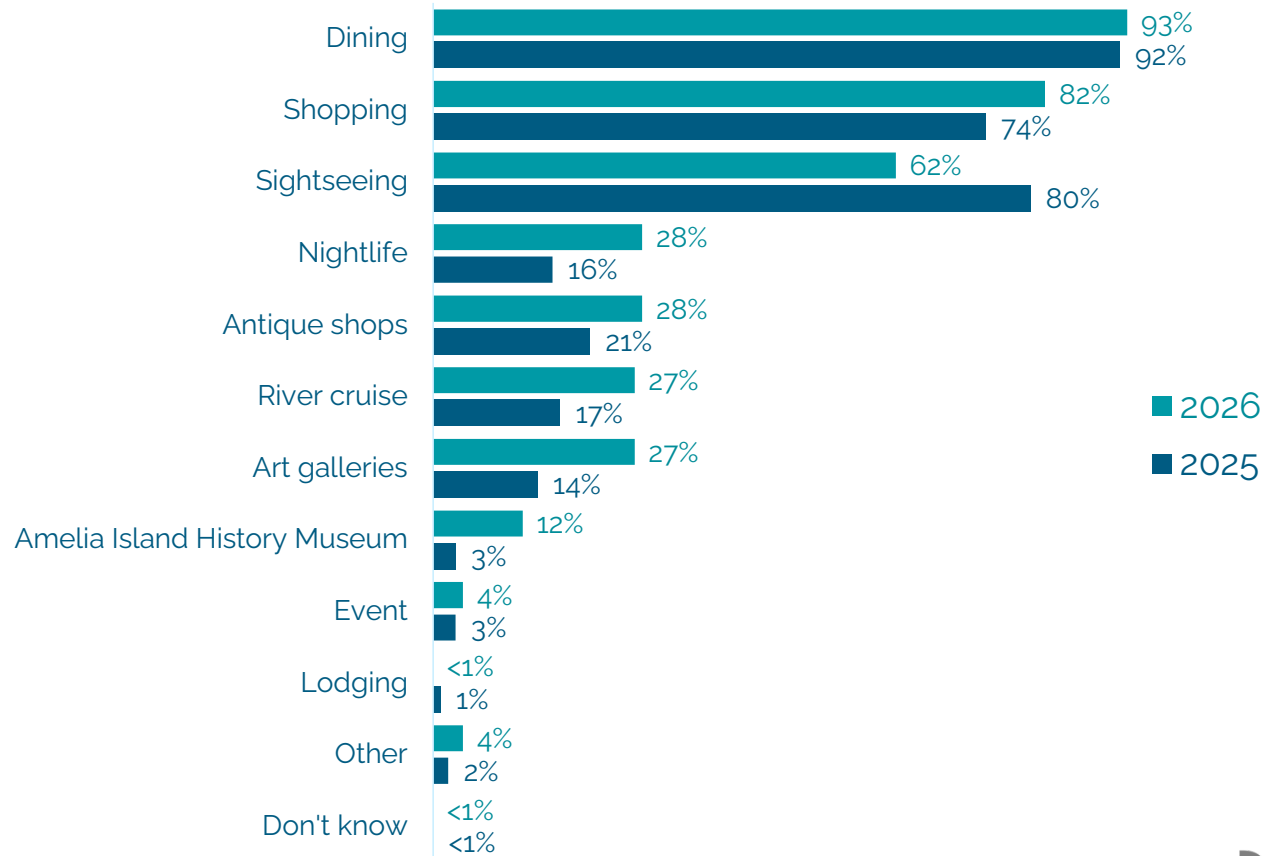
VISITING HISTORIC DOWNTOWN*

Average days visited per trip: **2.3**
(same as 2025)



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

REASON FOR VISITING HISTORIC DOWNTOWN*



*Multiple responses permitted.

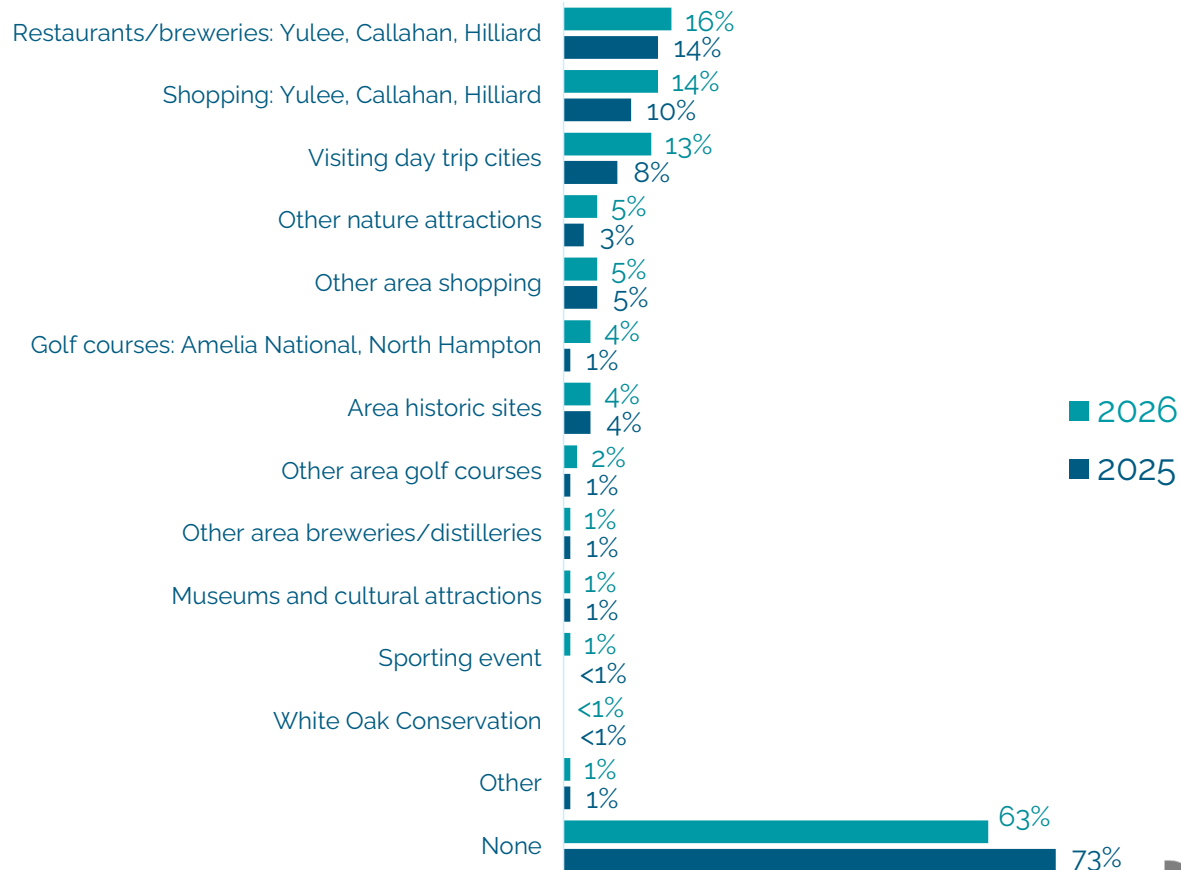
AREAS FOR IMPROVEMENT: DOWNTOWN*



- » Visitors love downtown's history and preservation, the shade and benches, dog friendliness, and its quaint, walkable charm
- » Ideas for improvement:
 - » Remove paid parking or provide clearer instructions
 - » Clearer parking signage and an easier-to-use parking app
 - » Better handicap accessibility - smoother road crossings and wider store entries for wheelchairs
 - » More for kids and teenagers to do
 - » More seating and shaded places to rest
 - » More dining options, including upscale waterfront seafood restaurants open for lunch
 - » More live music and entertainment
 - » Bike-share stations downtown and around the island

*Open-ended responses. Multiple responses permitted.

OFF-ISLAND ACTIVITIES*



*Multiple responses permitted.

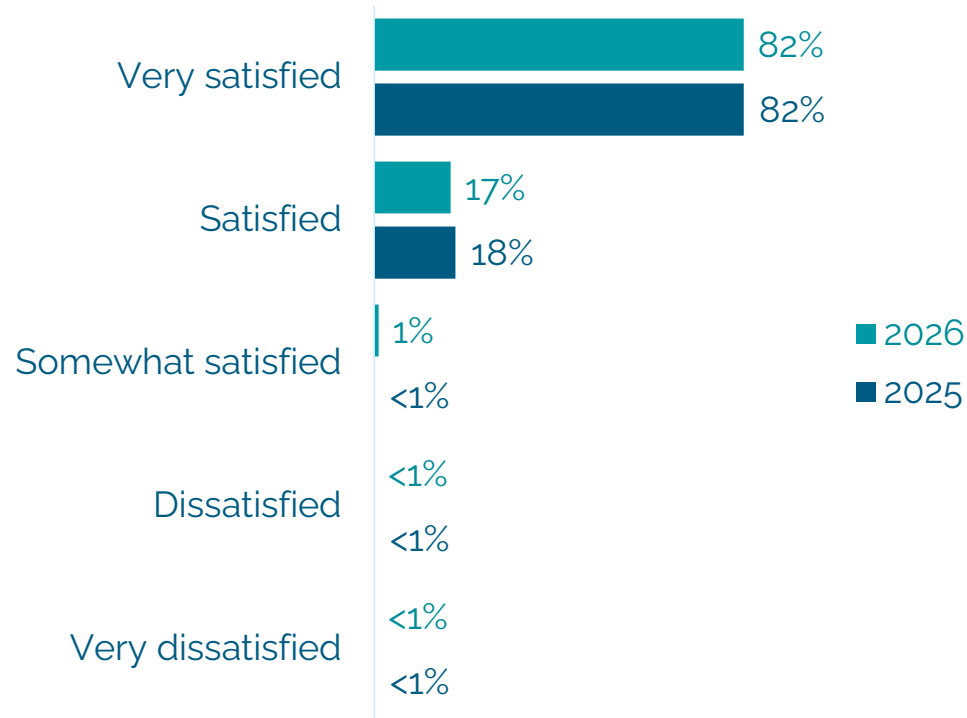
TRAVEL PARTY SPENDING

Category	Daily Spending		Total Spending	
	2025	2026	2025	2026
Accommodations	\$181	\$186	\$615	\$651
Restaurants	\$152	\$157	\$517	\$550
Groceries	\$41	\$35	\$139	\$123
Shopping	\$97	\$98	\$330	\$343
Activities & attractions	\$35	\$38	\$119	\$133
Transportation	\$34	\$27	\$116	\$95
Other	\$8	\$13	\$27	\$46
Total	\$548	\$554	\$1,863	\$1,941

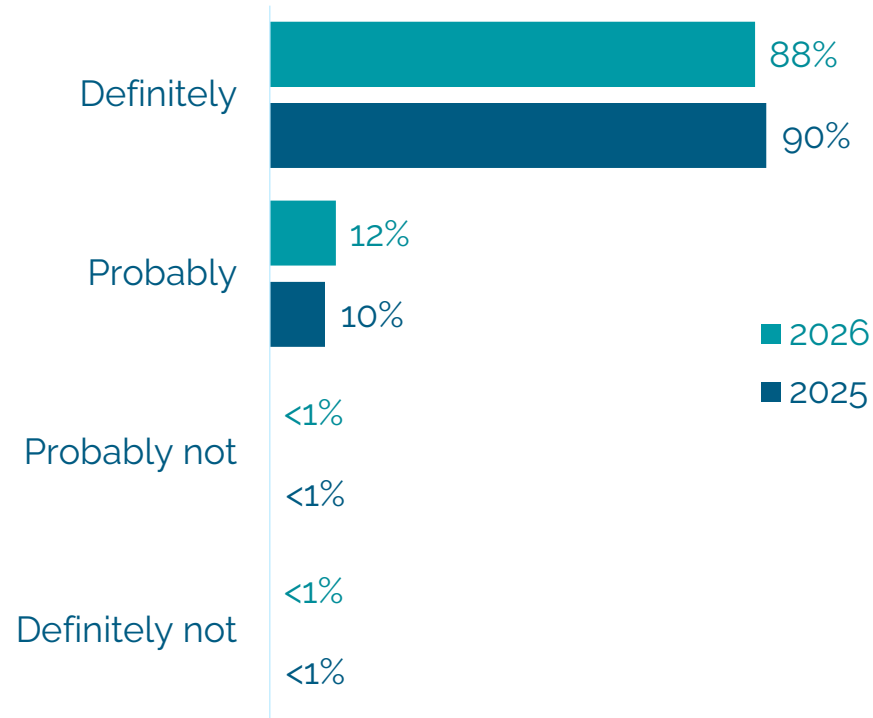
VISITOR JOURNEY: POST-TRIP



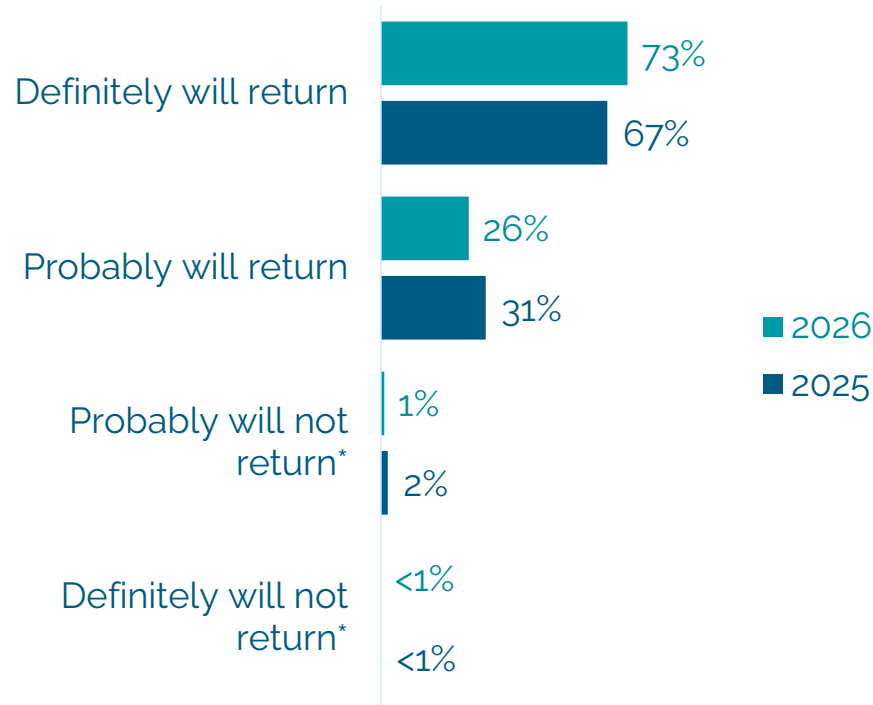
VISITOR SATISFACTION



RECOMMENDATION



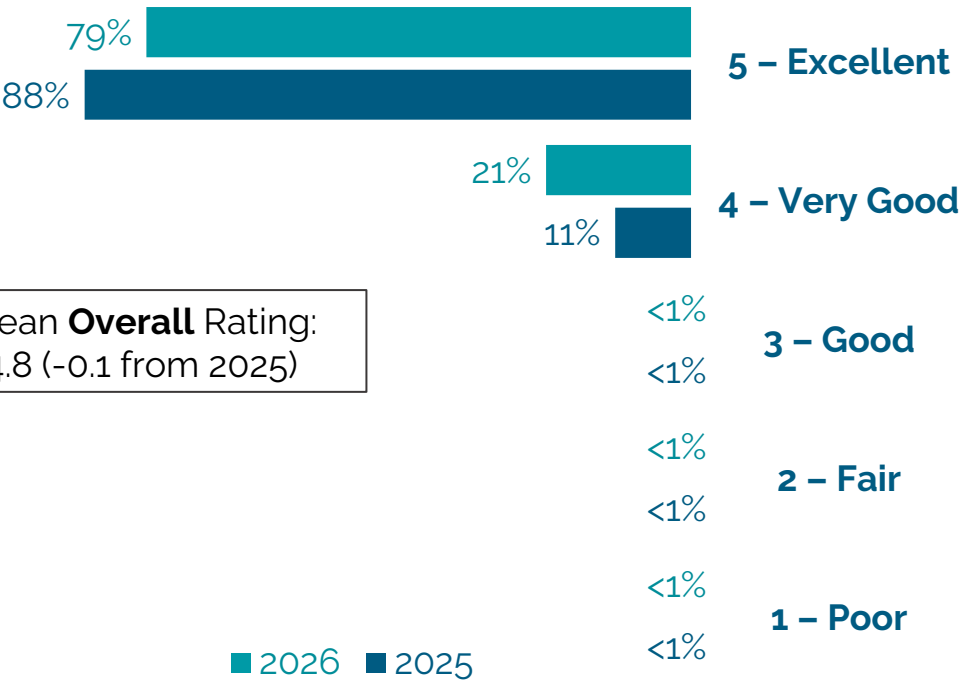
LIKELIHOOD OF RETURNING



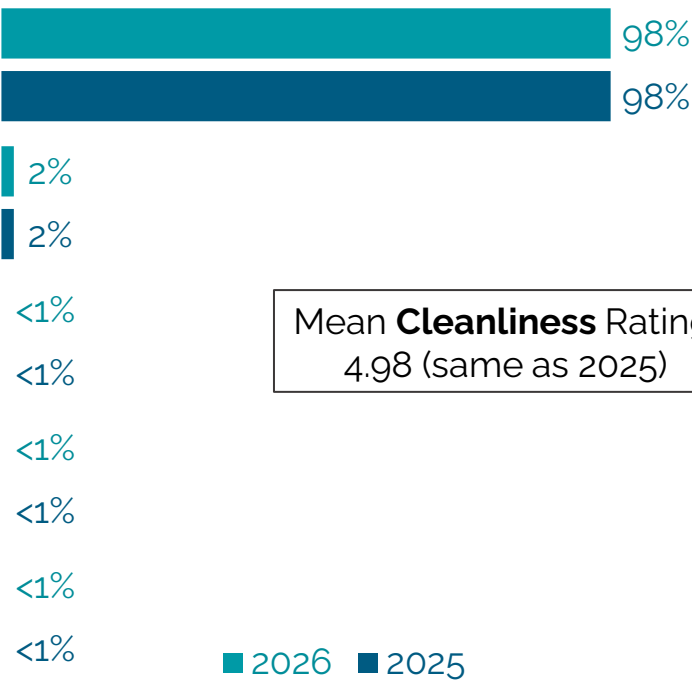
*Top reasons for not returning were 1) too difficult to get to 2) only went for a specific occasion and 3) prefer variety in vacation spots.

BEACH RATINGS

Overall Beach Rating



Beach Cleanliness Rating



AREA DESCRIPTIONS*



- "It's old Florida the way you remember it - safe, charming, and full of southern hospitality."
- "If you stay a week, you will want 2 [weeks]; if you stay for 3 months, you will want 6 [months]; if you stay for any longer, you will want to move here!"
- "It works for every kind of trip: a girls' getaway, a guys' golf weekend, or a multi-generational family vacation all feel right here."
- "It's less than an hour from us, but it feels so far away from the busyness of life."
- "It's the kind of place where you can stay as busy as you want or do absolutely nothing at all, and both feel perfect."
- "Beachy and laid-back, but with sophisticated restaurants and shops."
- "As we age, we continue to find things that pique our interest. This island is one of a kind."

*Open-ended responses. Multiple responses permitted.

Amelia Island CVB

Visitor Tracking Study April – June 2026

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