

Amelia Island CVB

**Visitor Tracking Study
July – September 2026**

METHODOLOGY



Data Collection:

From July 1, 2026, to September 30, 2026, **607** 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 607 is $\pm 4.0\%$ points given a 95% confidence level. That is, we are very certain (95%) that the results in our visitor tracking study are within 4.0% points of the "true" value on a quarterly basis.

KEY PERFORMANCE INDICATORS



KEY PERFORMANCE INDICATORS Q4 FY26¹

Both paid visitor number and day trippers increased YOY in FY26 Q4, for a total 3.4% increase in visitor number. A higher spend per visitor across all visitor segments led to a slightly larger increase in overall visitor spending (+4.4%) compared to visitor number.



224,500

**Total
Visitors**

+ 3.4% from FY25



199,720

**Room
Nights**

+ 0.7% from FY25



\$179,805,400

**Direct
Spending**

+ 4.4% from FY25



56.2%

Occupancy²

- 2.7% from FY25

LODGING METRICS Q4 FY26

COMBINED



56.2%

Occupancy

- 2.7% from FY25



\$311.12

**Average
Daily Rate**

+ 2.4% from FY25



\$174.75

**Revenue Per
Available Room**

- 0.4% from FY25

Note: Airbnb (effective July 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*



64.5%

Occupancy

+ 0.8% from FY25



\$314.93

**Average
Daily Rate**

+ 5.5% from FY25



\$203.03

**Revenue Per
Available Room**

+ 6.3% from FY25

VACATION RENTALS**



45.0%

Occupancy

- 4.5% from FY25



\$306.00

**Average Daily
Rate**

- 2.2% from FY25



\$137.70

**Revenue Per
Available Room**

- 6.6% from FY25

VISITOR PROFILE SUMMARY



VISITOR PROFILE Q4 FY26



48

Median Age

32%

First-Time Visitor

\$151,800

Median Household Income

\$592

Average Daily Travel Party Spend

2.8

Travel Party Size

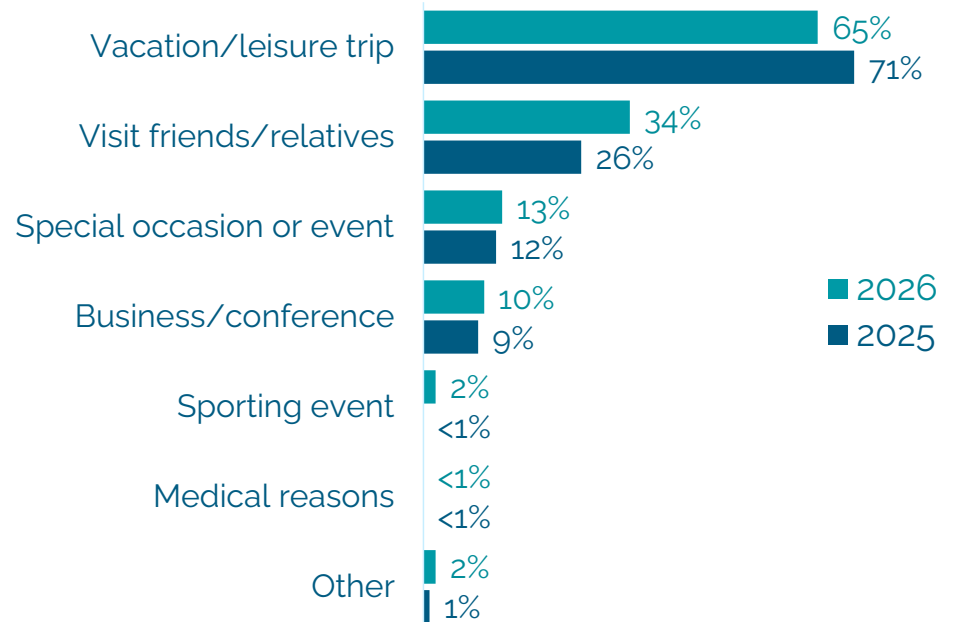
3.5

Length of Stay

MAIN REASONS FOR VISITING Q4 FY26*

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

- » Q4 visitors are more beach-focused and less event/culture-driven than visitors in other quarters
- » Friends and family in the area continue to increase YOY as a visitor draw in Q4
- » A larger share of visitors also relied on friends/family to help plan their trips YOY

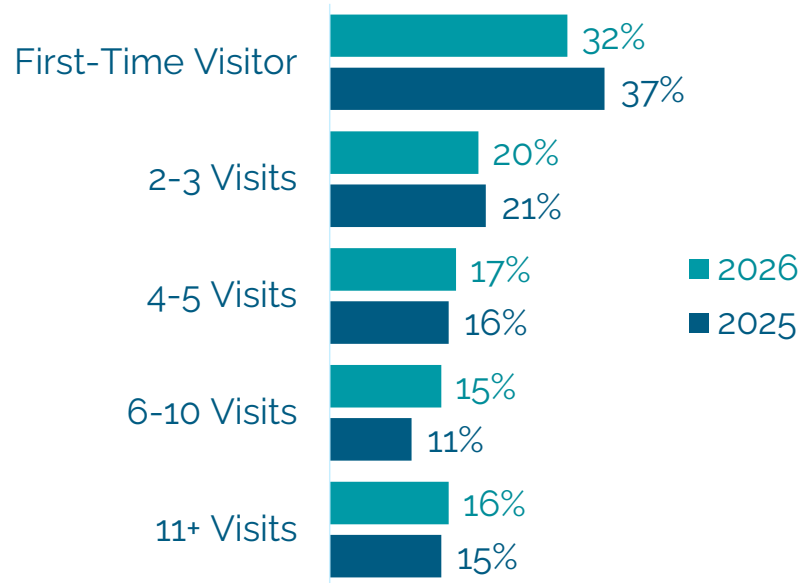


*Multiple responses permitted.

REPEAT VISITATION Q4 FY26

» Visitor loyalty is increasing

- » This quarter continues a 3-year trend of more repeat visitors coming to the area in Q4
- » More visitors definitely plan to return to Amelia Island



TOP ORIGIN MARKETS Q4 FY26

Top Origin Markets – All Visitors

Market	2025	2026
Jacksonville ¹	19.7%	24.8%
Atlanta	8.1%	7.6%
Orlando-Daytona Beach-Melbourne	4.7%	5.8%
Savannah	2.6%	3.5%
Charlotte	3.8%	3.3%
Nashville	2.8%	2.8%
New York City ²	2.9%	2.6%
Washington, DC-Hagerstown ³	2.8%	2.3%
Tampa-St. Petersburg	2.3%	2.2%

Top Origin Markets – Overnight Visitors

Market	2025	2026
Jacksonville ¹	9.4%	12.5%
Atlanta	9.5%	9.8%
Orlando-Daytona Beach-Melbourne	5.3%	6.9%
Savannah	2.9%	4.2%
Charlotte	3.8%	3.5%
New York City ²	3.4%	3.1%
Nashville	3.4%	3.0%
Washington, DC-Hagerstown ³	3.2%	2.8%
Tampa-St. Petersburg	2.2%	2.8%
Tallahassee-Thomasville	2.4%	2.2%

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: Q4 FY26*



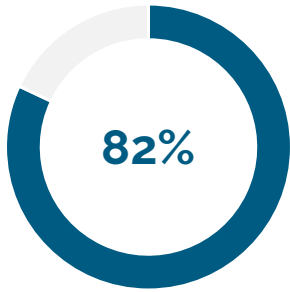
Reasons for Choosing Amelia Island

"I saw good reviews on TikTok, and it looked beautiful."

"We wanted to go camping, see the beach, fish, and hike nature trails, and it had all of them!"

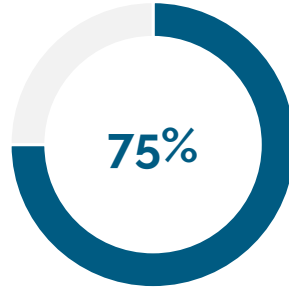
"Some places were too big, some were too small, and some weren't on the ocean. Amelia Island had it all."

SATISFACTION STATISTICS Q4 FY26



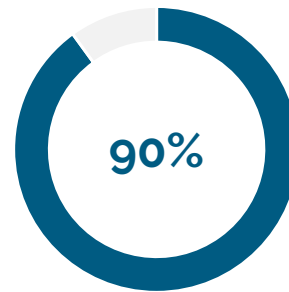
VERY SATISFIED

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



DEFINITELY RETURN

75% of visitors said they would definitely return to the area (+4% points from 2025).



DEFINITELY RECOMMEND

90% 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: Q4 FY26*



Describing Amelia Island

"It's like taking a step back to a day when people were nice and places were clean and taken care of. A real breath of fresh air."

"This place is like a Norman Rockwell painting. Beautiful is an understatement!"

"If you don't like it here, you won't like it anywhere."

VISITOR PROFILE INSIGHTS Q4 FY26

Insights

More paid visitors and day trippers came to the area compared to FY25 Q4 and both visitor segments spent more money across their trip.

Amelia Island's Q4 visitors are more beach-focused and less event/culture-driven than visitors in other quarters.

Friends and family in the area continue to increase YOY as a visitor draw in Q4.

A larger share of visitors relied on friends/family to help plan their trips YOY.

This quarter continues a 3-year trend of more repeat visitors coming to the area in Q4.

A larger share of visitors traveled from Jacksonville, Orlando, and Savannah compared to Q4 last year.

More visitors definitely plan to return to the Amelia Island area (+4% points from 2025).

DETAILED FINDINGS



VISITOR JOURNEY: KEY PERFORMANCE INDICATORS



TOURISM SNAPSHOT: KPIs

	July – September 2025	July – September 2026	% Δ
Visitors	217,200	224,500	+ 3.4%
Visitor Days ¹	868,800	785,750	- 9.6%
Direct Spending	\$172,244,300	\$179,805,400	+ 4.4%

	July – September 2025	July – September 2026	% Δ
Occupancy ^{2,3}	57.7%	56.2%	- 2.7%
ADR ²	\$303.89	\$311.12	+ 2.4%
RevPAR ²	\$175.36	\$174.75	- 0.4%
Room Nights ²	198,410	199,720	+ 0.7%

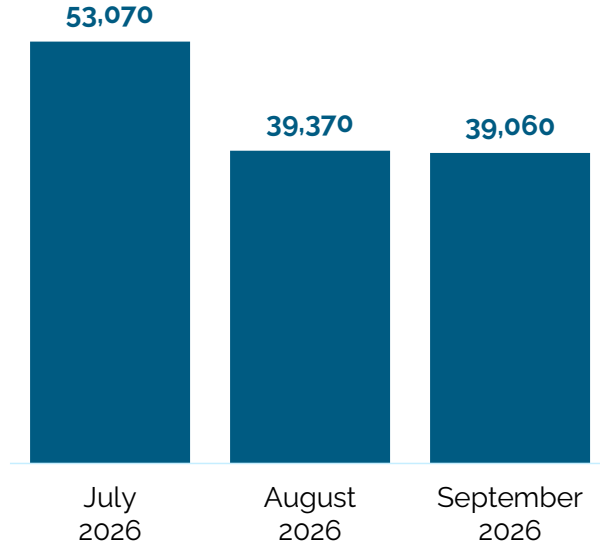
¹Visitor days decreased despite an increase in visitor number due to a decrease in length of stay.

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

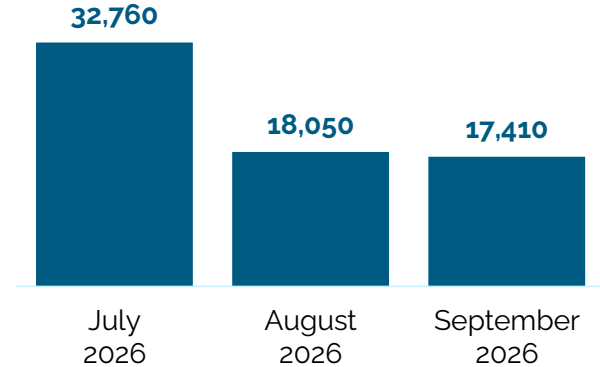
³Decrease in occupancy partially due to an increase in vacation rental units.

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	July Visitors	August Visitors	September Visitors
Hotel/motel/resort	39,410	29,250	29,980
Vacation rental	21,470	11,860	11,830
Non-paid accommodations*	16,380	12,160	12,460
Day tripper	15,860	11,770	12,070
Total	93,120	65,040	66,340

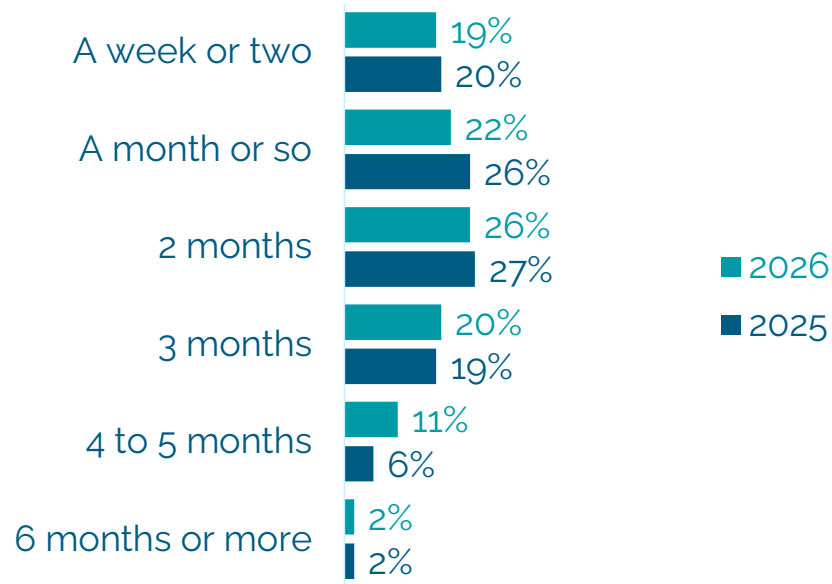
*Visitors staying with friends or relatives or in a second home.

VISITOR JOURNEY: PRE-VISIT



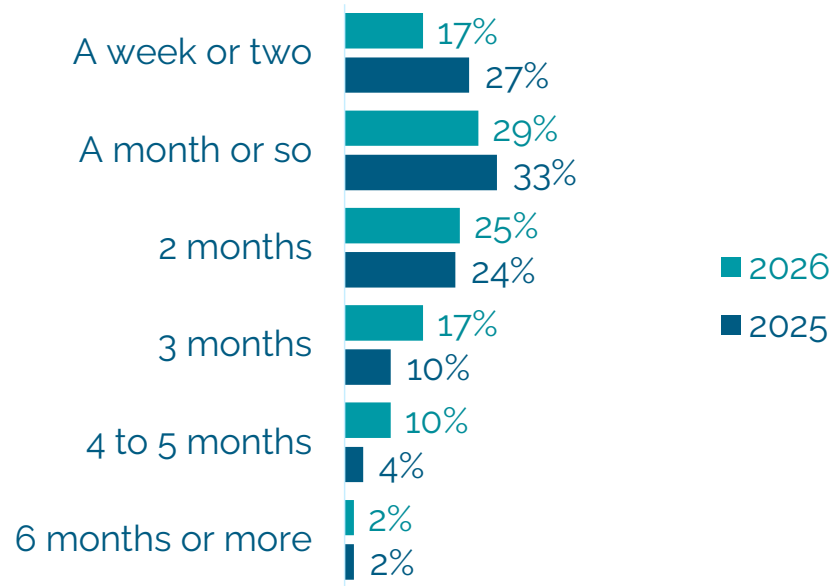
TRIP PLANNING CYCLE*

Average planning cycle: **60 days**



TRIP BOOKING CYCLE*

Average booking cycle: **57 days**

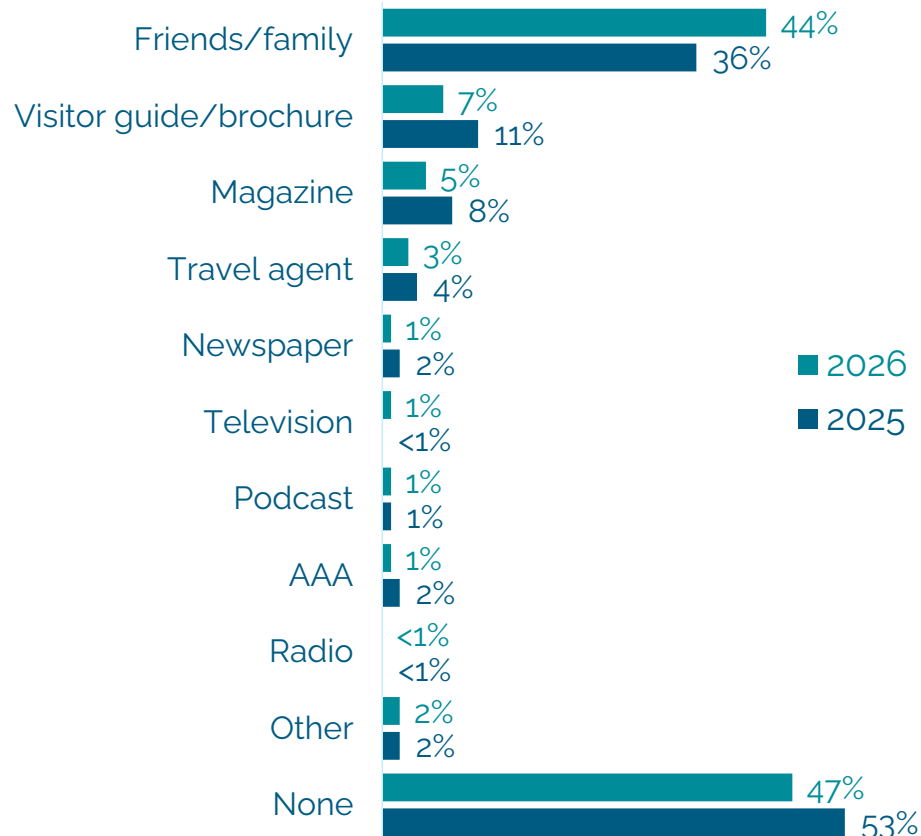


ONLINE TRIP PLANNING SOURCES*

Online Planning Source	2025	2026
Online travel agency	29%	34%
Hotel websites/apps	30%	30%
Review website/app	28%	24%
Amelia Island social media	24%	18%
Airbnb, Vrbo, etc.	17%	18%
Restaurant websites/apps	9%	15%
Online travel reviews, blogs, stories	11%	12%
Ameliasland.com	7%	9%
Personal social media	11%	8%
ChatGPT or other AI program	4%	8%
Mapping websites	4%	6%
Video streaming services	2%	3%
Airline websites/apps	4%	3%
Amelia Island mobile app	3%	2%
Amelia Island rental companies	3%	2%
Rental car websites/apps	1%	2%
Music streaming services	<1%	<1%
Accessibility travel resource sites	<1%	<1%
Other	1%	2%
None	33%	28%

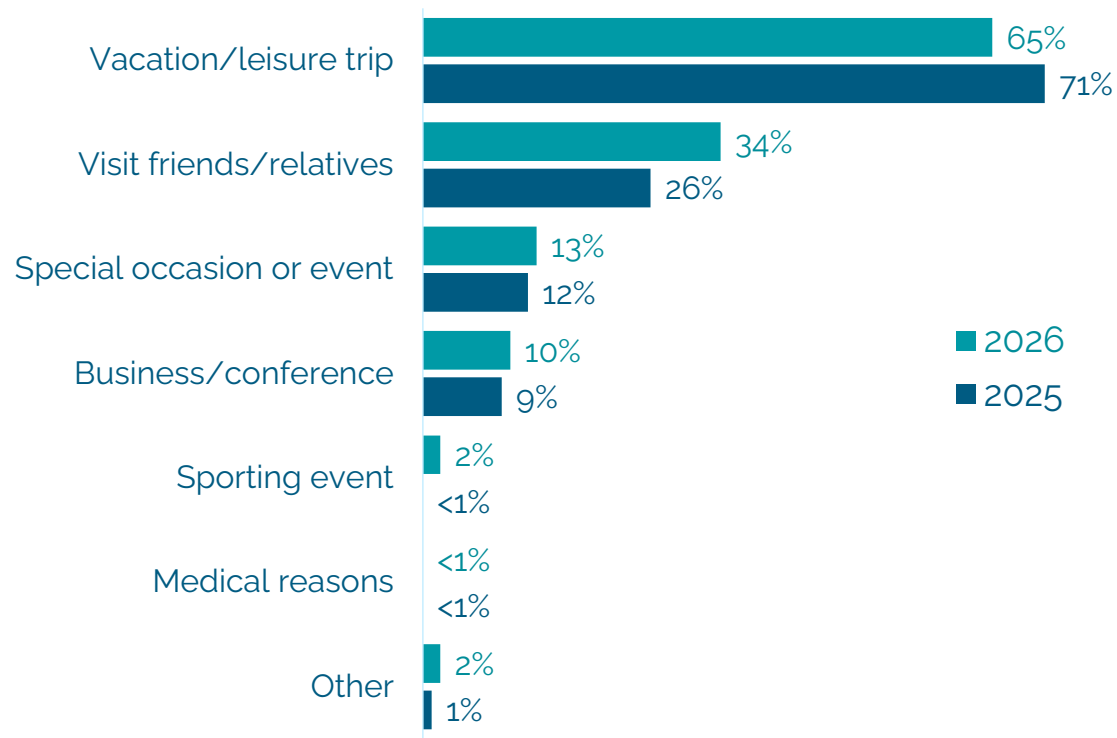
*Multiple responses permitted.
Based on visitors traveling for leisure.

OTHER TRIP PLANNING SOURCES*



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

REASONS FOR VISITING*



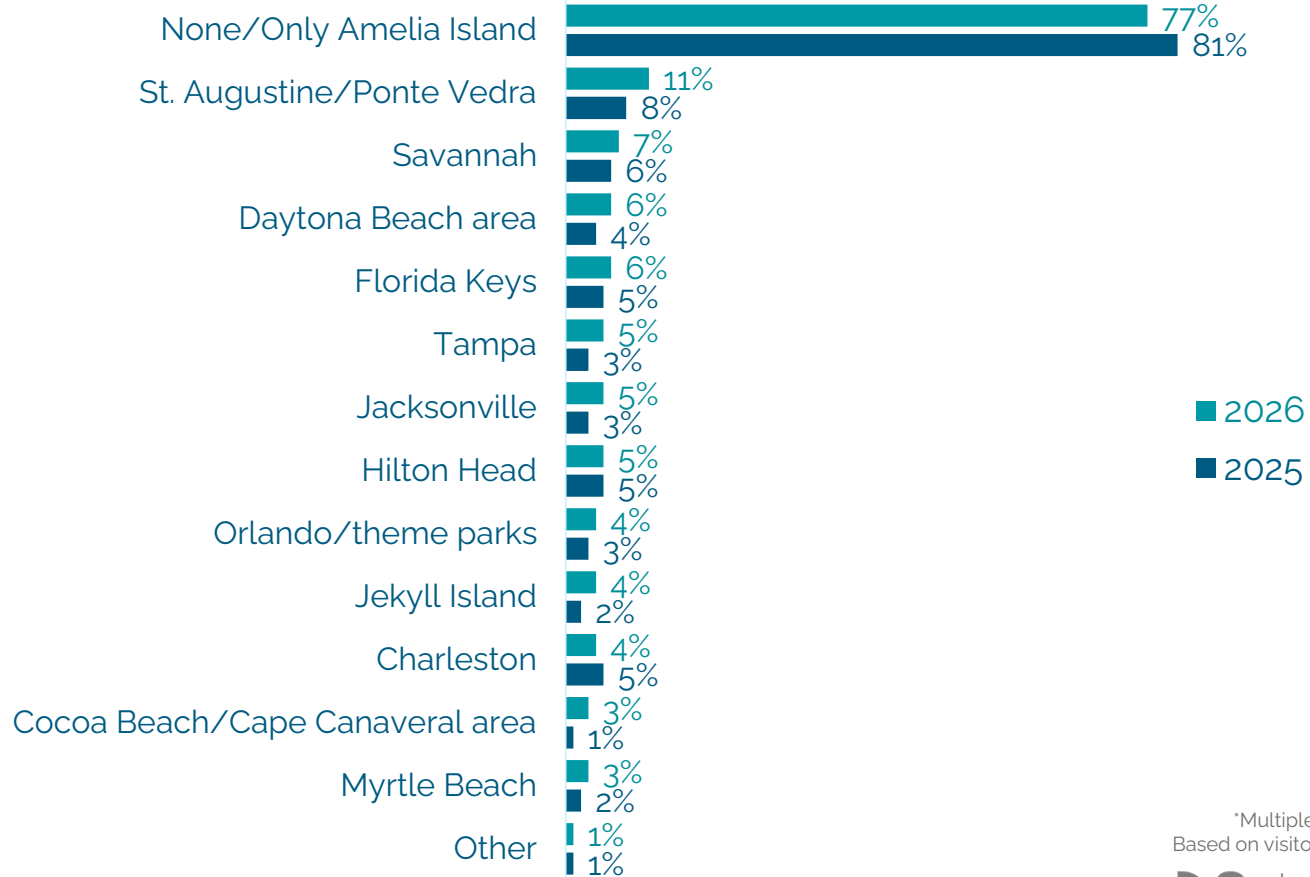
*Multiple responses permitted.

DETAILED REASONS FOR VISITING*

Main Reasons for Visiting	2025	2026
Beach trip	59%	55%
Visit friends/relatives	26%	34%
Shopping	13%	13%
Foodie/culinary	11%	12%
History	13%	10%
Company/government business	5%	7%
Girls/guys trip	6%	6%
Nature, bird watching, eco tours, etc.	6%	6%
Water sports	5%	5%
Wedding/honeymoon	4%	5%
Biking, hiking, running, etc.	4%	4%
Golf or tennis	1%	3%
Birthday/anniversary	3%	3%
Conference/convention/trade show	4%	3%
Reunion	2%	2%
Breweries/distilleries	1%	1%
Art galleries, museums, cultural events	1%	1%
Sporting event	1%	1%
Amelia Island Dining Month	<1%	1%
Festival	<1%	<1%
Concert	<1%	<1%
Performing arts	<1%	<1%

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

OTHER DESTINATIONS CONSIDERED*



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

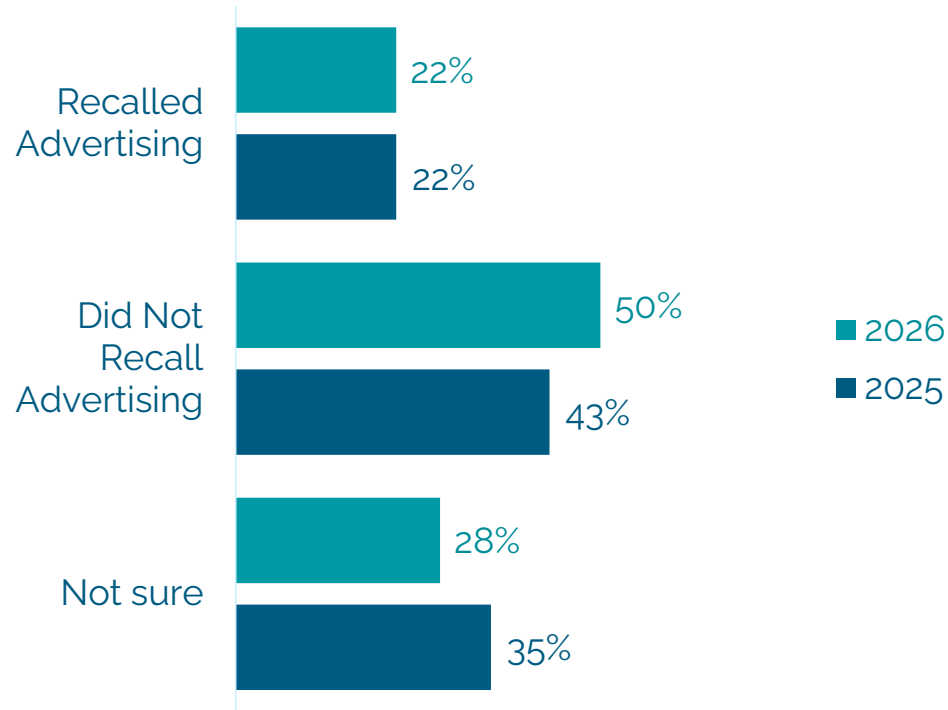
REASONS FOR CHOOSING AMELIA ISLAND*



- “We wanted a historic town with the beach right there. At other places, we would have had to drive several miles from the historic area to the beach.”
- “It has enough to do, but it's still small and easy to get around!”
- “We heard St. Augustine was very busy, so we decided to stay here and make a day trip down there.”
- “Some places were too big, some were too small, and some weren't on the ocean. Amelia Island had it all.”
- “We wanted to go camping, see the beach, fish, and hike nature trails, and it had all of them!”
- “It's quieter and more laid-back than the other places we looked at, and it was more affordable.”
- “I saw good reviews on TikTok, and it looked beautiful.”

*Open-ended responses. Multiple responses permitted.

ADVERTISING RECALL*



ADVERTISING SOURCES*

Advertisements influenced **15%** of **all leisure visitors** to visit the Amelia Island area (**+3% points from 2025**).

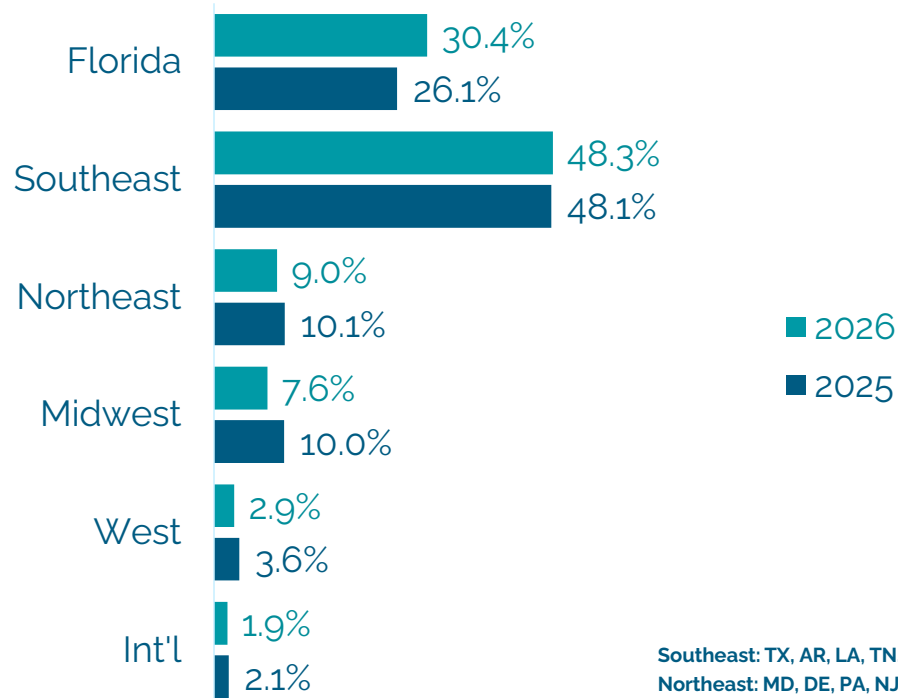
Advertising Source	2025	2026
Online article	15%	19%
Amelia Island's social media	9%	6%
Magazine article	6%	4%
Traveler reviews/blogs	6%	4%
Magazine ad	5%	3%
Ad on a website	4%	3%
Travel/visitor guide	5%	3%
Television	<1%	2%
Video streaming services	2%	2%
Rental agency/other booking website	1%	2%
Personal social media	4%	2%
Podcast	1%	1%
Deal-based promotion	1%	1%
AAA	1%	1%
Billboard	<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

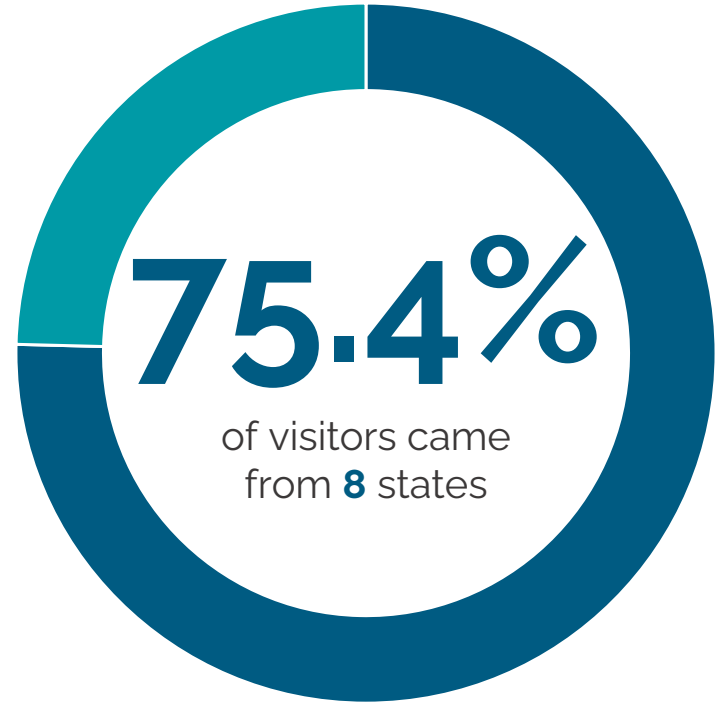
Midwest: KY, OH, IN, MI, WI, IL, MN, IA, MO, ND, SD, NE, KS, OK

West: WA, OR, CA, NV, ID, MT, WY, CO, UT, AZ, NM, AK, HI

* The top international market was the UK (0.5%); +0.1% points from 2025).

TOP ORIGIN STATES

State	2025	2026
Florida	26.1%	30.4%
Georgia	22.9%	24.7%
South Carolina	5.8%	5.5%
North Carolina	5.8%	5.3%
Tennessee	3.7%	3.4%
Texas	1.8%	2.2%
Virginia	2.2%	2.1%
Ohio	2.5%	1.8%



TOP ORIGIN MARKETS

Top Origin Markets – All Visitors

Market	2025	2026
Jacksonville ¹	19.7%	24.8%
Atlanta	8.1%	7.6%
Orlando-Daytona Beach-Melbourne	4.7%	5.8%
Savannah	2.6%	3.5%
Charlotte	3.8%	3.3%
Nashville	2.8%	2.8%
New York City ²	2.9%	2.6%
Washington, DC-Hagerstown ³	2.8%	2.3%
Tampa-St. Petersburg	2.3%	2.2%

Top Origin Markets – Overnight Visitors

Market	2025	2026
Jacksonville ¹	9.4%	12.5%
Atlanta	9.5%	9.8%
Orlando-Daytona Beach-Melbourne	5.3%	6.9%
Savannah	2.9%	4.2%
Charlotte	3.8%	3.5%
New York City ²	3.4%	3.1%
Nashville	3.4%	3.0%
Washington, DC-Hagerstown ³	3.2%	2.8%
Tampa-St. Petersburg	2.2%	2.8%
Tallahassee-Thomasville	2.4%	2.2%

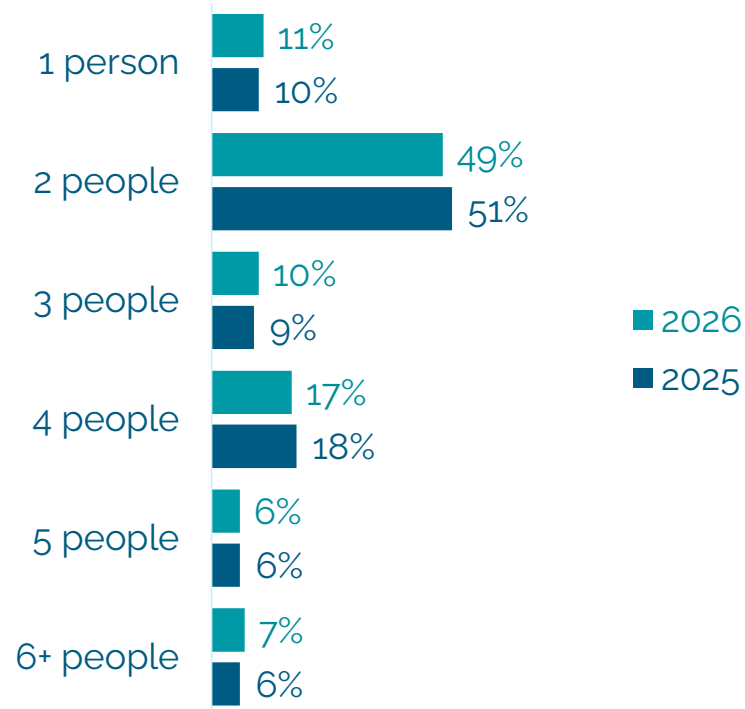
¹Includes Jacksonville, FL and Brunswick, GA.

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

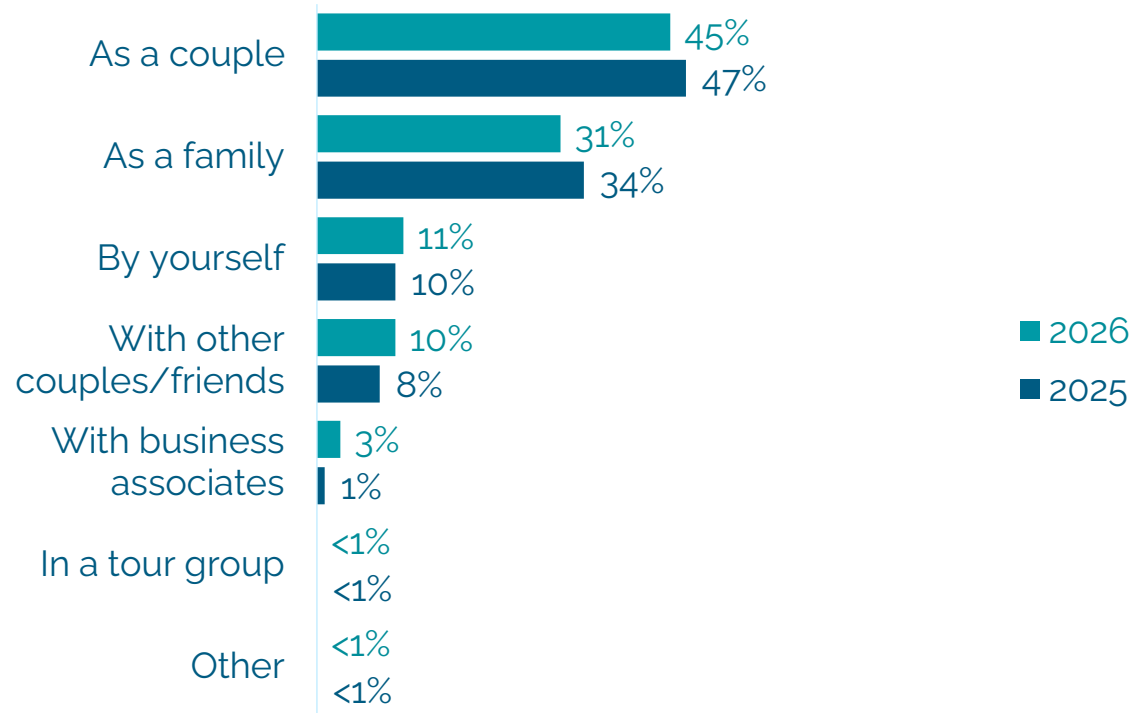
³Includes parts of Maryland, Virginia, West Virginia, and Pennsylvania.

TRAVEL PARTY SIZE

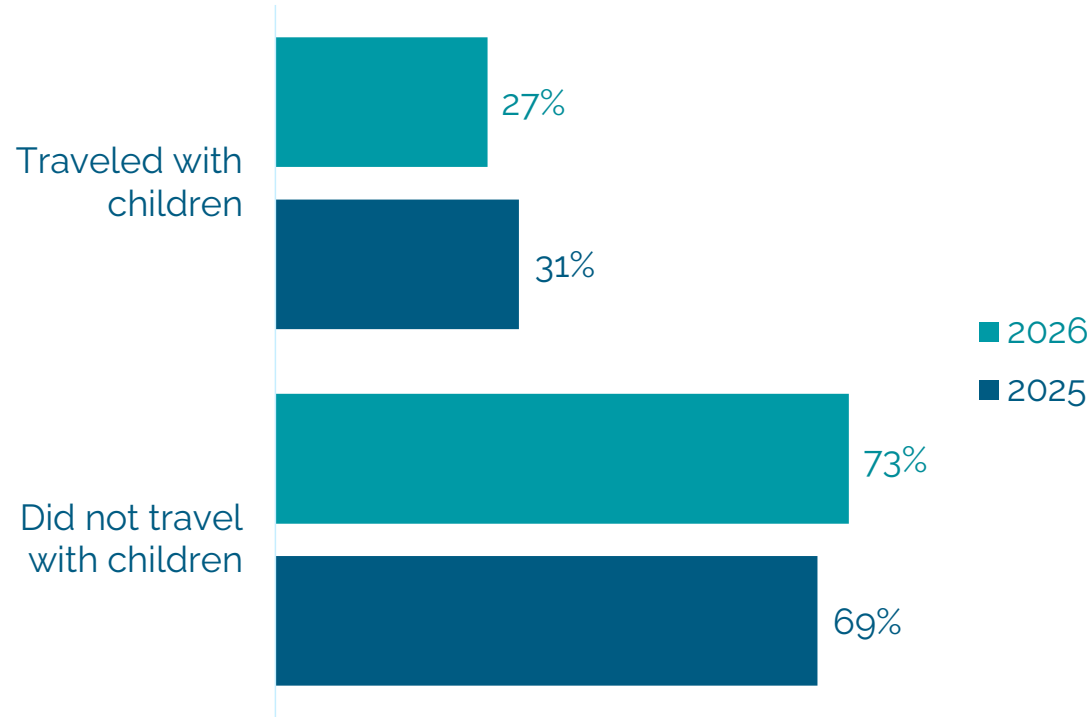
Average travel party size: **2.8**
(-0.1 from 2025)

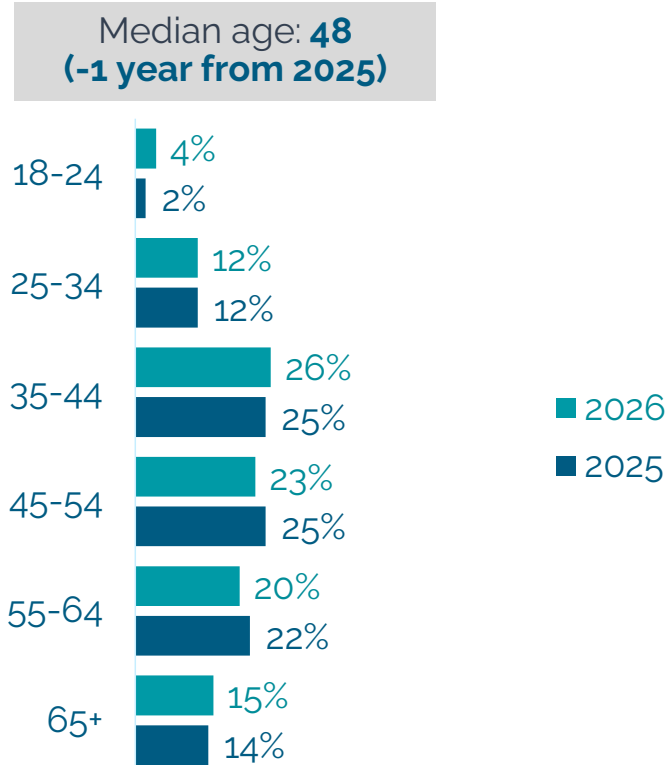


TRAVEL PARTY TYPE



TRAVELED WITH CHILDREN

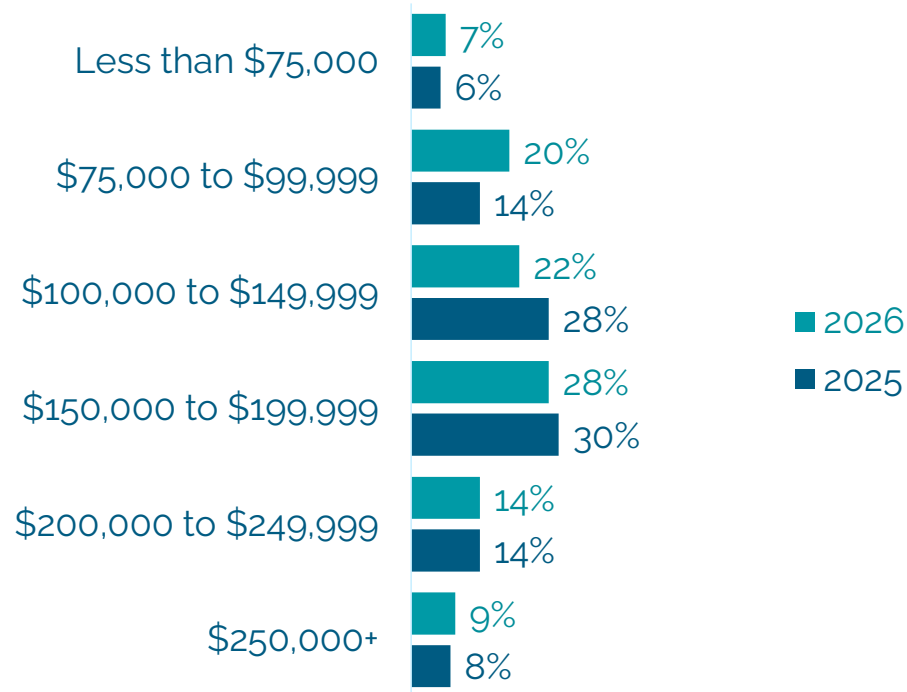




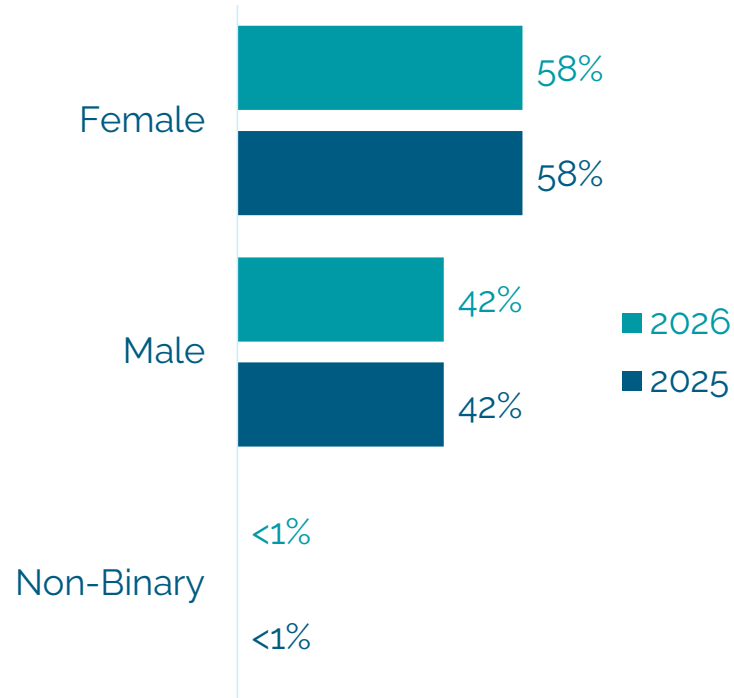
*Demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

HOUSEHOLD INCOME

Median household income: **\$151,800**
(**-\$530 from 2025**)

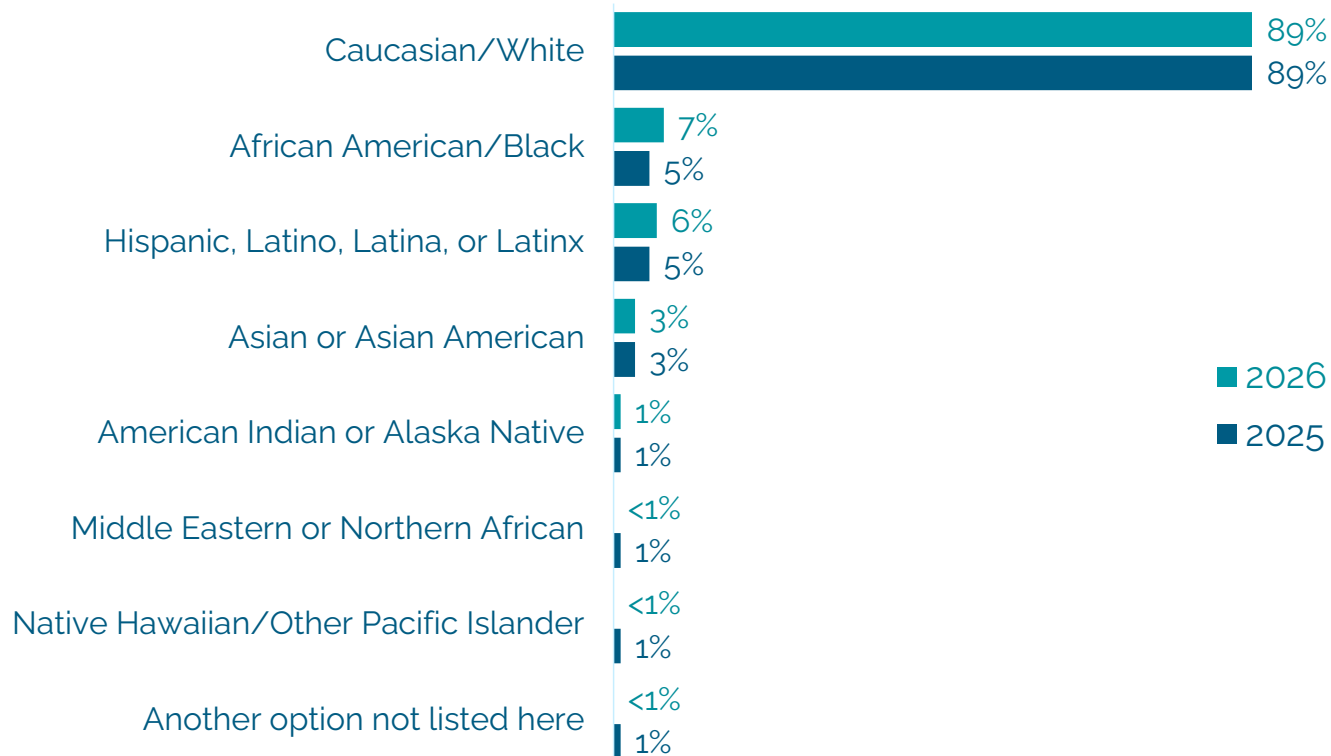


GENDER*



*Demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

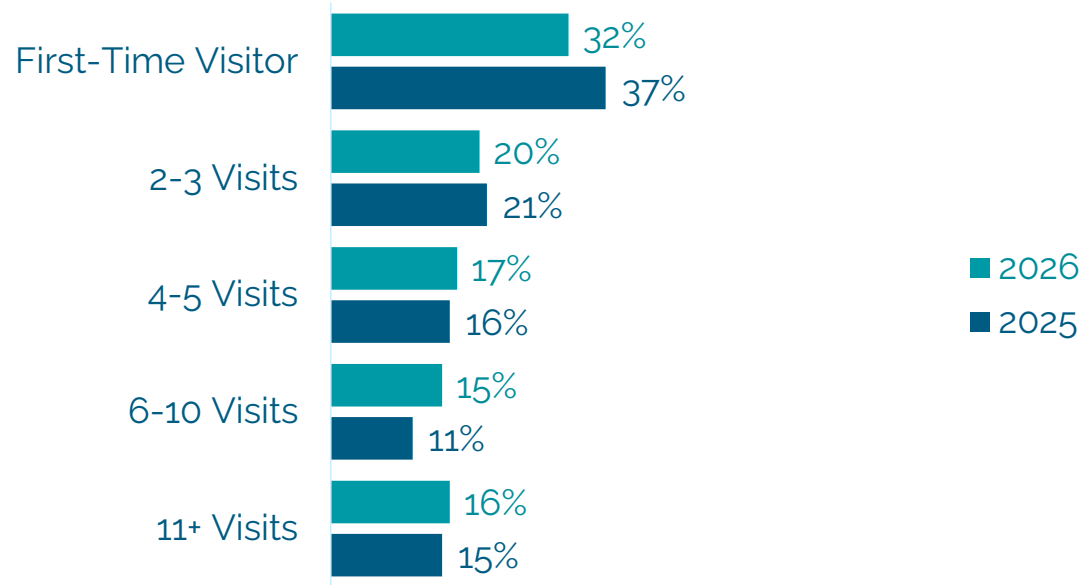
RACE*



*Multiple responses permitted.

Demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

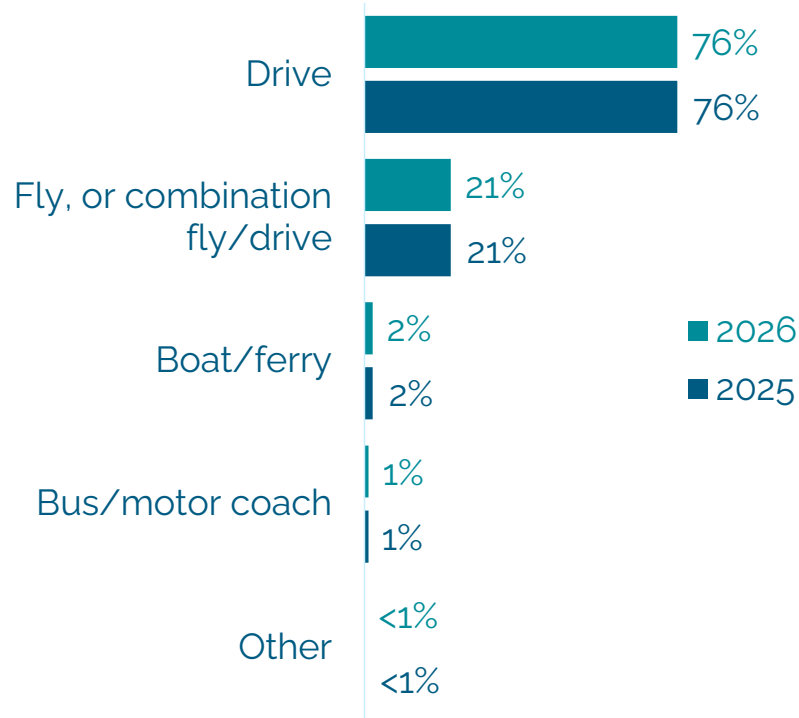
NEW & RETURNING VISITORS



VISITOR JOURNEY: TRIP EXPERIENCE

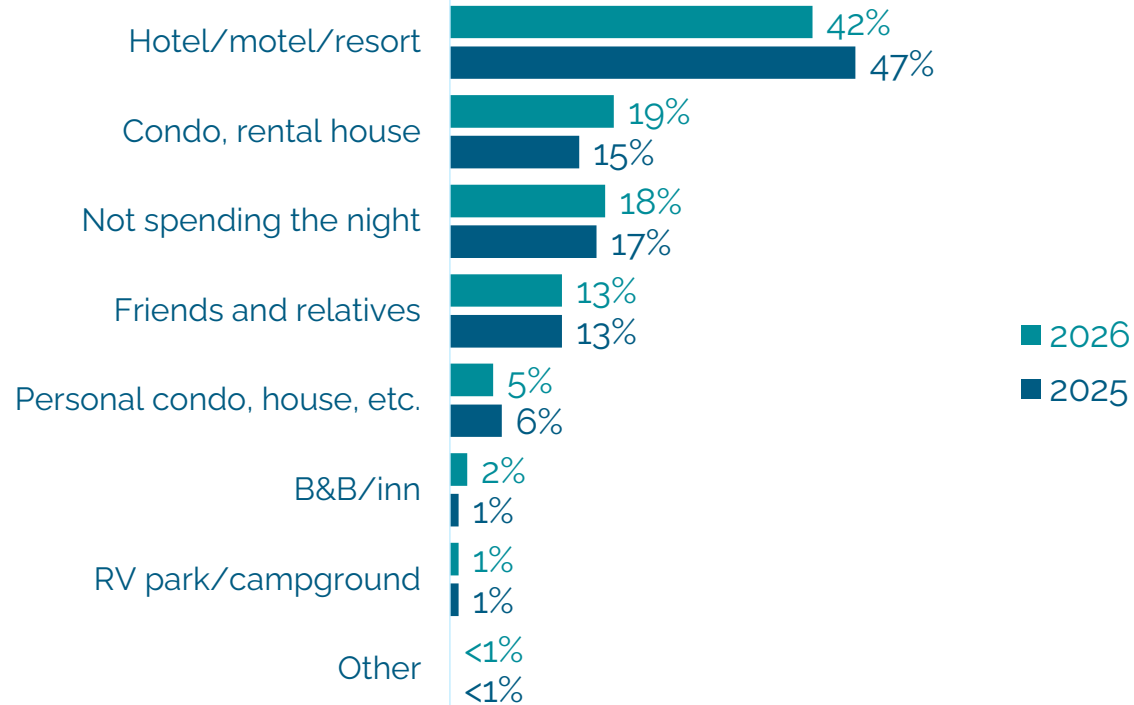


TRANSPORTATION



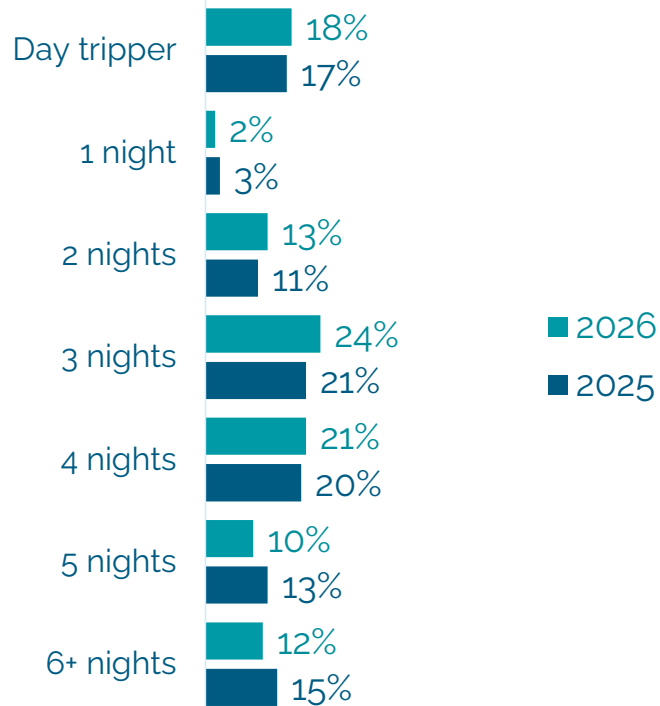
*18% of all visitors flew into the Jacksonville International Airport (same as 2025).

ACCOMMODATIONS

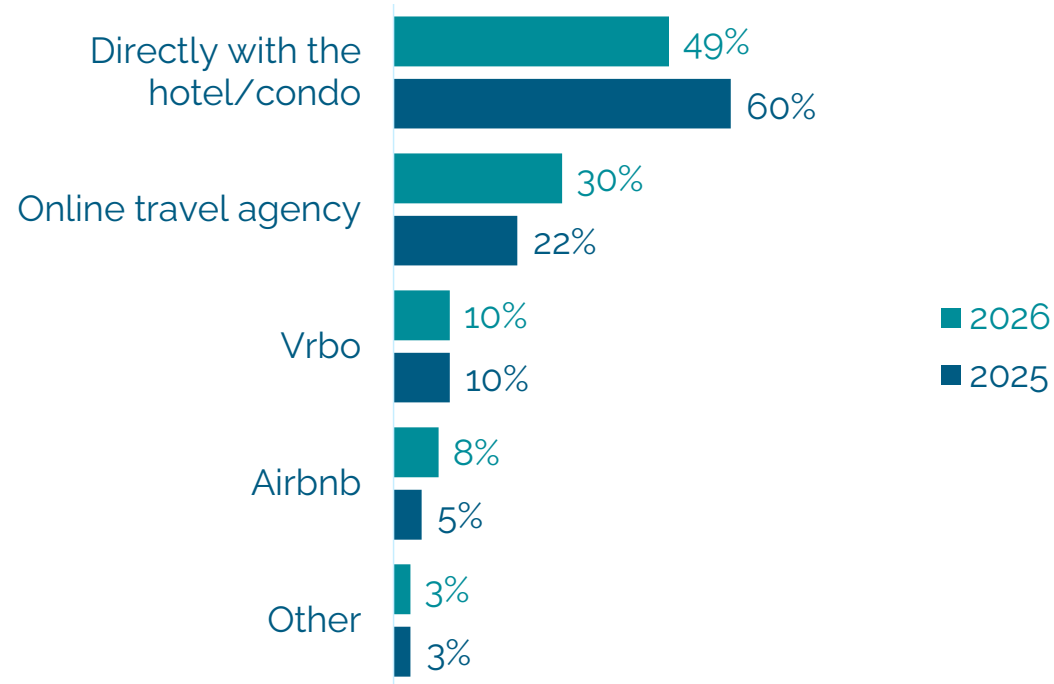


NIGHTS STAYED

Average nights stayed (all visitors): **3.5 (-0.5 from 2025)**
Average nights stayed (paid visitors): **4.0 (-0.3 from 2025)**



ACCOMMODATION BOOKING



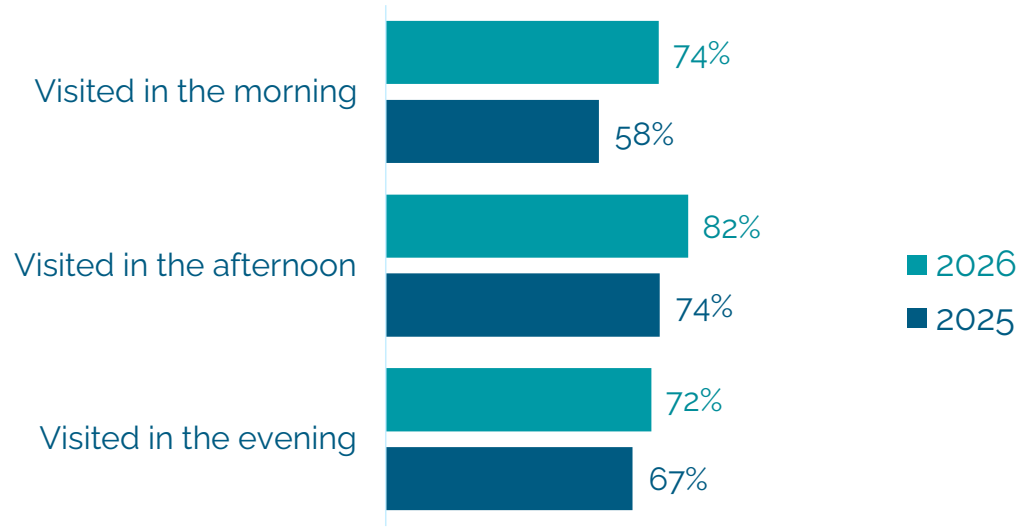
VISITOR ACTIVITIES*

Activity	2025	2026
Dining out	87%	87%
Beach	77%	78%
Historic Downtown Fernandina Beach	82%	75%
Shopping	64%	63%
Visit friends/relatives	31%	40%
Family time	23%	29%
Biking, hiking, running, etc.	28%	29%
Farmers market	24%	28%
Bars, nightclubs	22%	27%
Attractions	23%	20%
Golf or tennis	15%	18%
State parks	13%	15%
Water sports	13%	13%
Amelia Island Dining Month	6%	10%
Business meetings/conferences	9%	9%
Special events	7%	7%
Art galleries, museums	8%	7%
Spas	5%	5%
Attend/participate in a sporting event	2%	4%
Horseback riding	1%	1%
Other	1%	2%

*Multiple responses permitted.

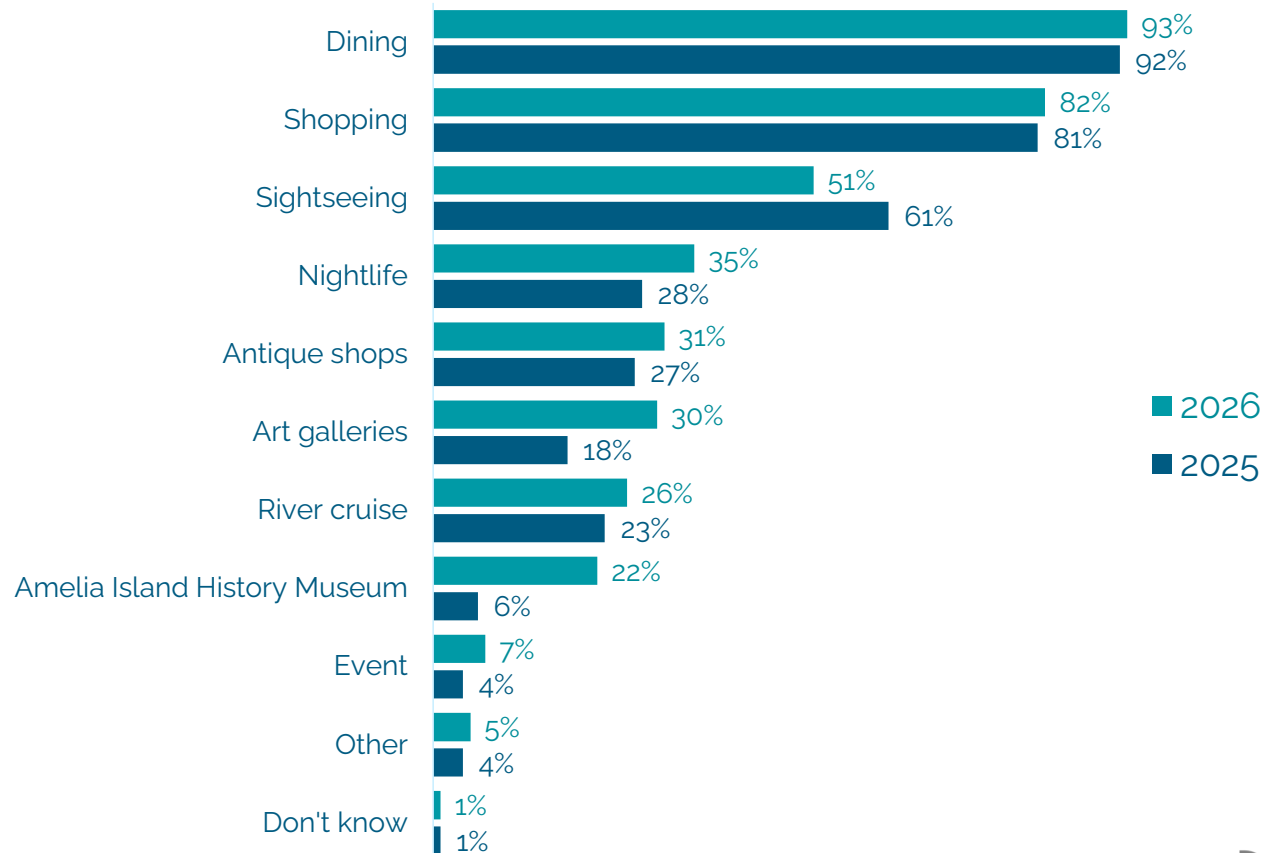
VISITING HISTORIC DOWNTOWN*

Average days visited per trip: **2.4**
(-0.1 day from 2025)



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

REASON FOR VISITING HISTORIC DOWNTOWN*



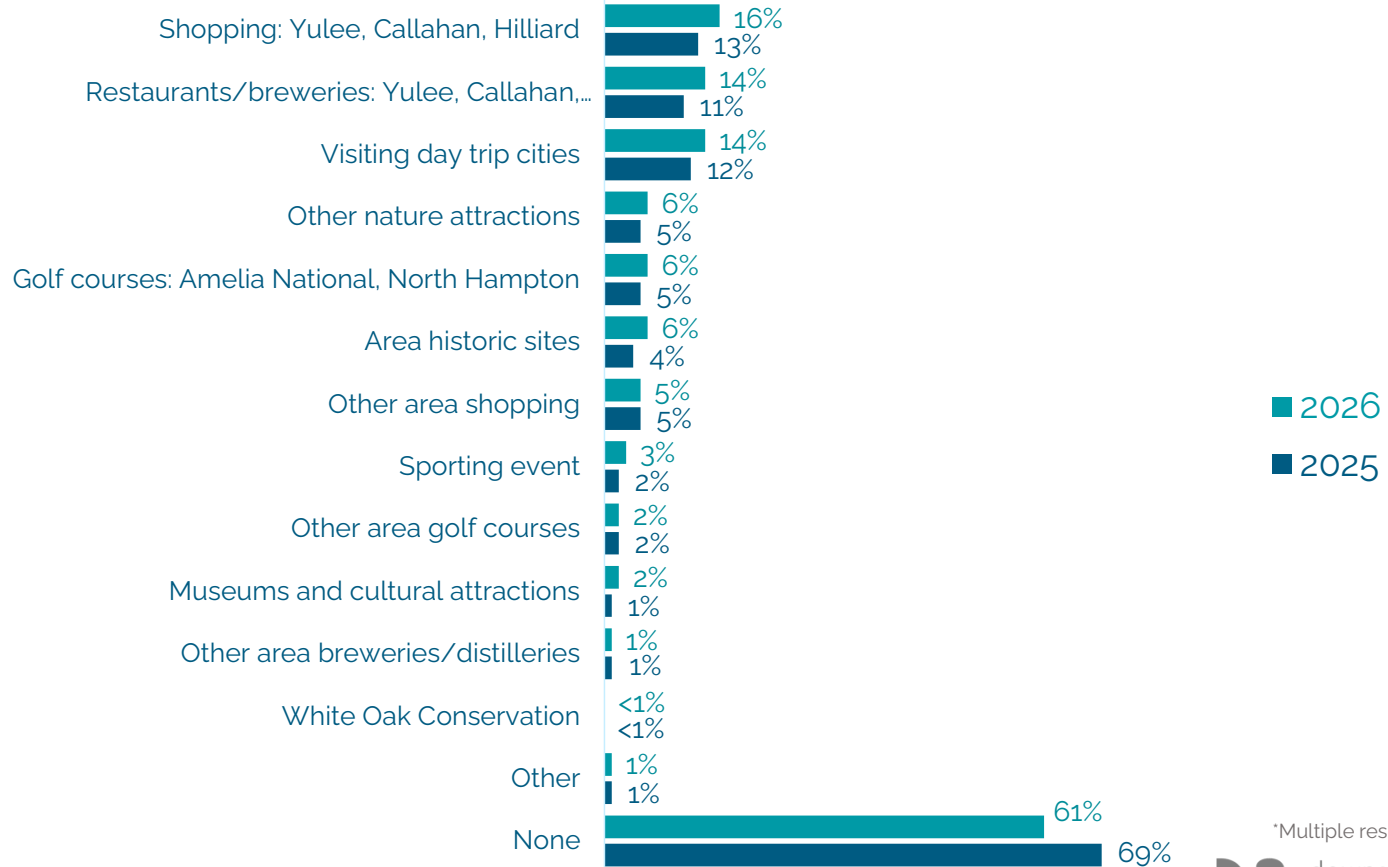
AREAS FOR IMPROVEMENT: DOWNTOWN*



- » Visitors like downtown's historic architecture, shaded benches with name plates, friendly people, ice cream shops, and small, quaint feel
- » Ideas for improvement:
 - » More ways to cool off, including shaded seating, air conditioned restrooms, and misting or water stations
 - » More for kids and teenagers to do, especially in the early evening
 - » More use of the waterfront, such as a walkway along the water, dining with views, and a fishing pier
 - » More live music and street performers
 - » More pedestrian and bike options
 - » Exhibits on the island's Black history, including American Beach
 - » More quick and casual food options
 - » Easier-to-find public restrooms

*Open-ended responses. Multiple responses permitted.

OFF-ISLAND ACTIVITIES*



*Multiple responses permitted.

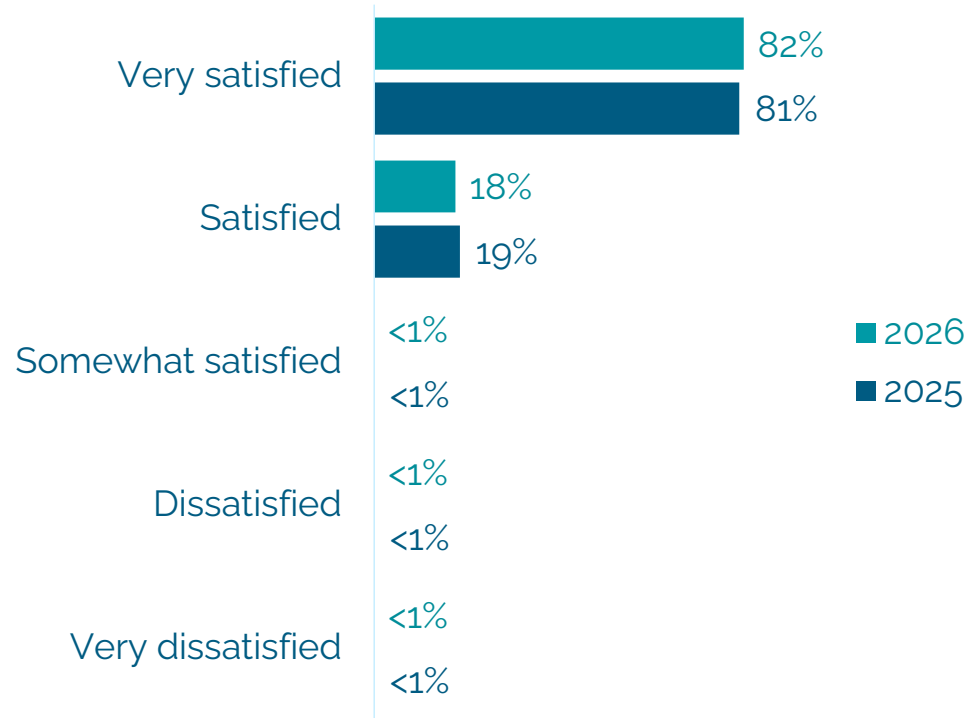
TRAVEL PARTY SPENDING

Category	Daily Spending		Total Spending	
	2025	2026	2025	2026
Accommodations	\$194	\$207	\$776	\$725
Restaurants	\$156	\$153	\$624	\$536
Groceries	\$33	\$34	\$132	\$119
Shopping	\$84	\$91	\$336	\$319
Activities & attractions	\$41	\$53	\$164	\$186
Transportation	\$29	\$38	\$116	\$133
Other	\$10	\$16	\$40	\$56
Total	\$547	\$592	\$2,188	\$2,072

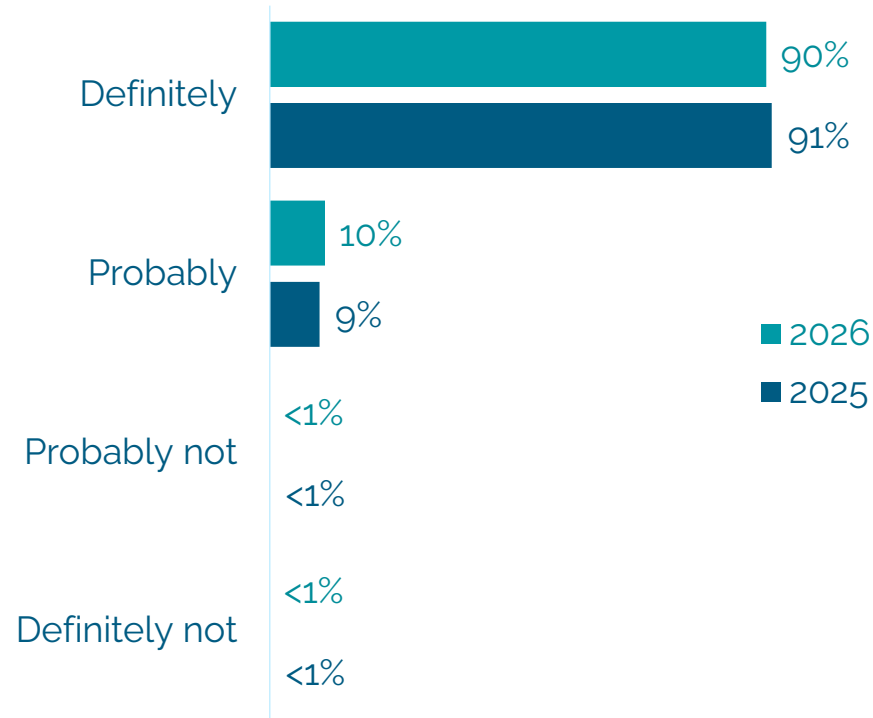
VISITOR JOURNEY: POST-TRIP



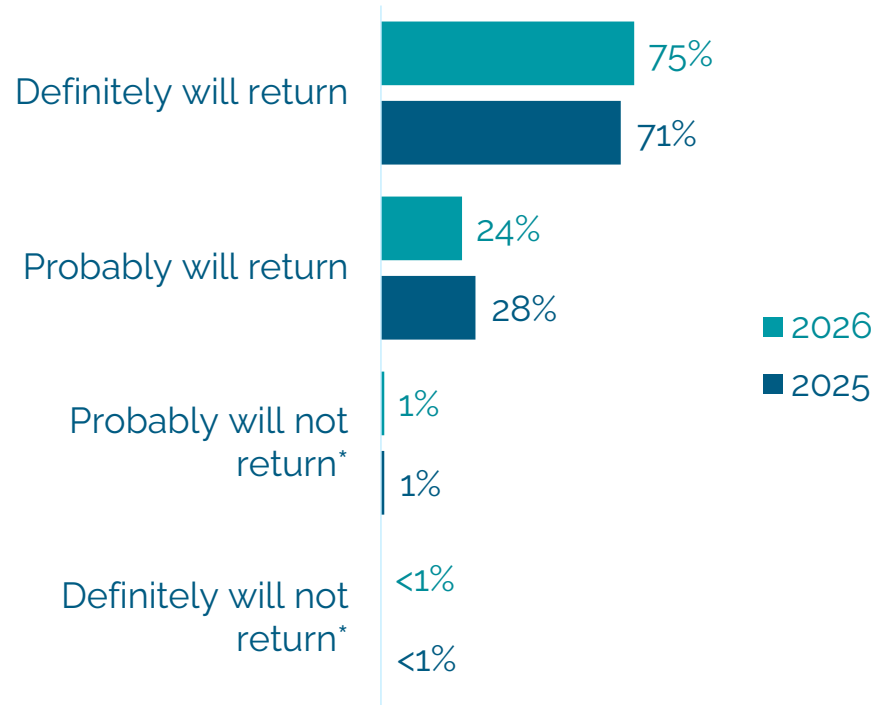
VISITOR SATISFACTION



RECOMMENDATION



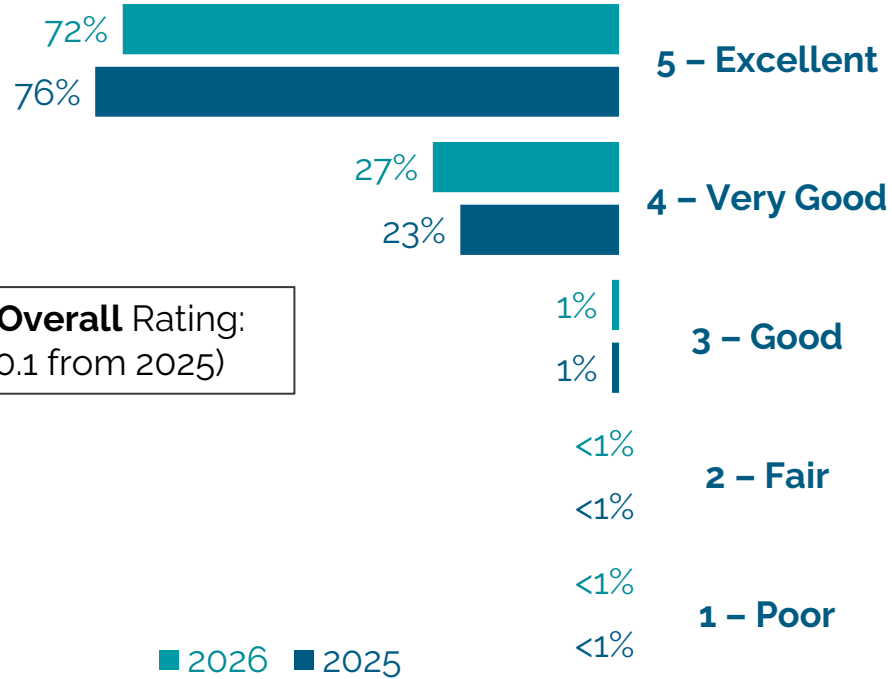
LIKELIHOOD OF RETURNING



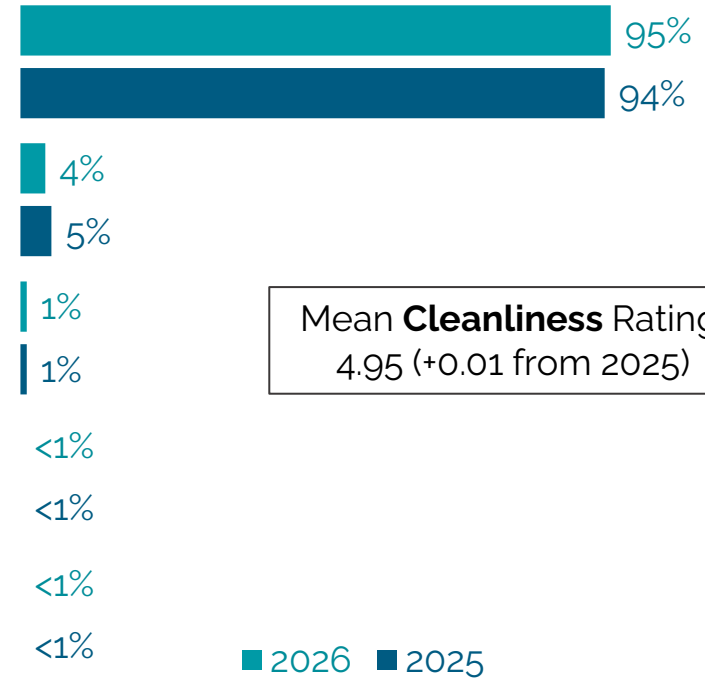
*Top reasons for not returning were 1) too difficult to get to 2) only went for a specific occasion and 3) prefer variety in vacation spots.

BEACH RATINGS

Overall Beach Rating



Beach Cleanliness Rating



AREA DESCRIPTIONS*



- "This place is like a Norman Rockwell painting. Beautiful is an understatement!"
- "It feels safe enough to give older kids some freedom, and they enjoyed it!"
- "Old Florida charm with friendly locals who want you to enjoy the island."
- "A better place to stay than Jacksonville when you're in town for a game or event."
- "Everything is close together, so you don't need to drive much once you're here."
- "It's like taking a step back to a day when people were nice and places were clean and taken care of. A real breath of fresh air."
- "Great beaches, a walkable historic district, and family-owned shops and restaurants."
- "If you don't like it here, you won't like it anywhere."

*Open-ended responses. Multiple responses permitted.

Amelia Island CVB

Visitor Tracking Study July – September 2026

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