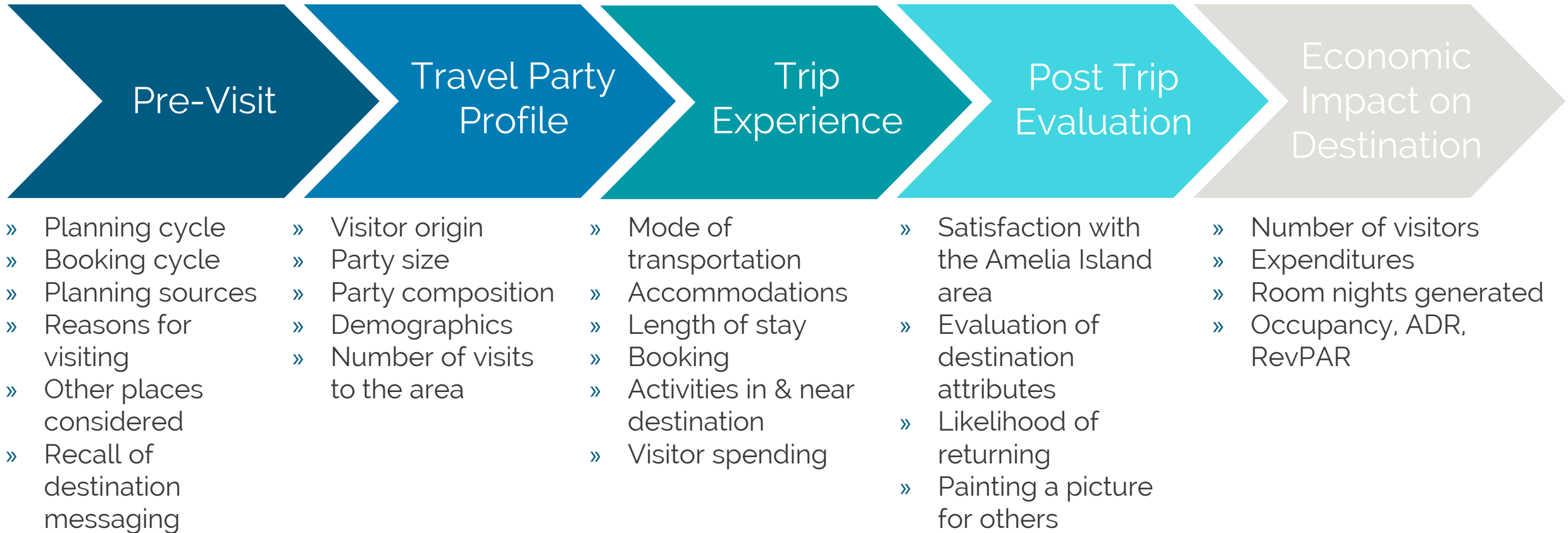


Amelia Island CVB

**Visitor Tracking Study
July – September 2024**

STUDY OBJECTIVES: VISITOR JOURNEY



EXECUTIVE SUMMARY



QUARTERLY SNAPSHOT

July – September
2024

- » This report includes data for all visitors, whereas the FY2023 Q4 report was based solely on data from visitors staying in paid accommodations. Some year-over-year differences will be due to this change in methodology.
- » Booking cycle is shorter compared to Q3 (-7 days)
- » Southeast visitation was up compared to Q3 (+11% points), particularly Georgia visitation (+4% points)
- » Despite the lower visitor number, those who visited spent more while in the area compared to last year, contributing to an increase in overall spending



222,700

TOTAL
VISITORS



193,460

ROOM
NIGHTS



\$186,373,100

DIRECT
SPENDING



846,260

VISITOR
DAYS

vs. 2023

↓ 4.1%

↓ 2.7%

↑ 1.9%

↓ -1.5%

VISITOR JOURNEY: ECONOMIC IMPACT



TOURISM SNAPSHOT: METRICS

	July – September 2023 ^{1,2}	July – September 2024	% Δ
Visitors	232,200	222,700	-4.1%
Visitor Days	859,140	846,260	-1.5%
Direct Spending	\$182,866,400	\$186,373,100	+1.9%
Economic Impact ³	\$240,652,200	\$245,267,000	+1.9%

	July – September 2023 ²	July – September 2024	% Δ
Occupancy ⁴	57.6%	55.5%	-3.6%
ADR ⁴	\$311.28	\$317.17	+1.9%
RevPAR ⁴	\$179.30	\$176.09	-1.8%
Room Nights ⁴	198,890	193,460	-2.7%

¹This data has been modeled to include all visitors for comparative purposes. Previous data only reported visitors staying in paid accommodations.

²Previous data revised to reflect updated FY2023 Q4 accommodations figures.

³An IMPLAN multiplier of 1.32 was used for both FY2023 and FY2024.

⁴Sources: Research Data Services, Key Data, Smith Travel Research, Florida Department of Business and Professional Regulation.

VISITOR JOURNEY: PRE-VISIT



TRIP PLANNING/BOOKING CYCLE*

- » On average, leisure visitors began planning **31 days** before their trip
- » On average, leisure visitors booked their trip **24 days** before their arrival



TOP TRIP PLANNING SOURCES*



33% Hotel websites/apps



30% Friends/family



24% Amelia Island's social media



16% Review website/app

TOP REASONS FOR VISITING*



65% Vacation/leisure



25% Visit friends/relatives



16% Special occasion or event

OTHER DESTINATIONS CONSIDERED*

Over **1 in 3** leisure visitors considered another destination before choosing Amelia Island.

Top other destinations considered:



15% Florida Keys



13% Savannah



12% St. Augustine/Ponte Vedra

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

ADVERTISING RECALL*

- » **33%** of leisure visitors recalled advertising about the Amelia Island area
- » This information influenced **15%** of **all** leisure visitors to visit the Amelia Island area

*Based on visitors traveling for leisure.

TOP SOURCES OF ADVERTISING RECALL*

Base: All Leisure Visitors



15% Magazine article



15% Online article



15% Amelia Island's social media



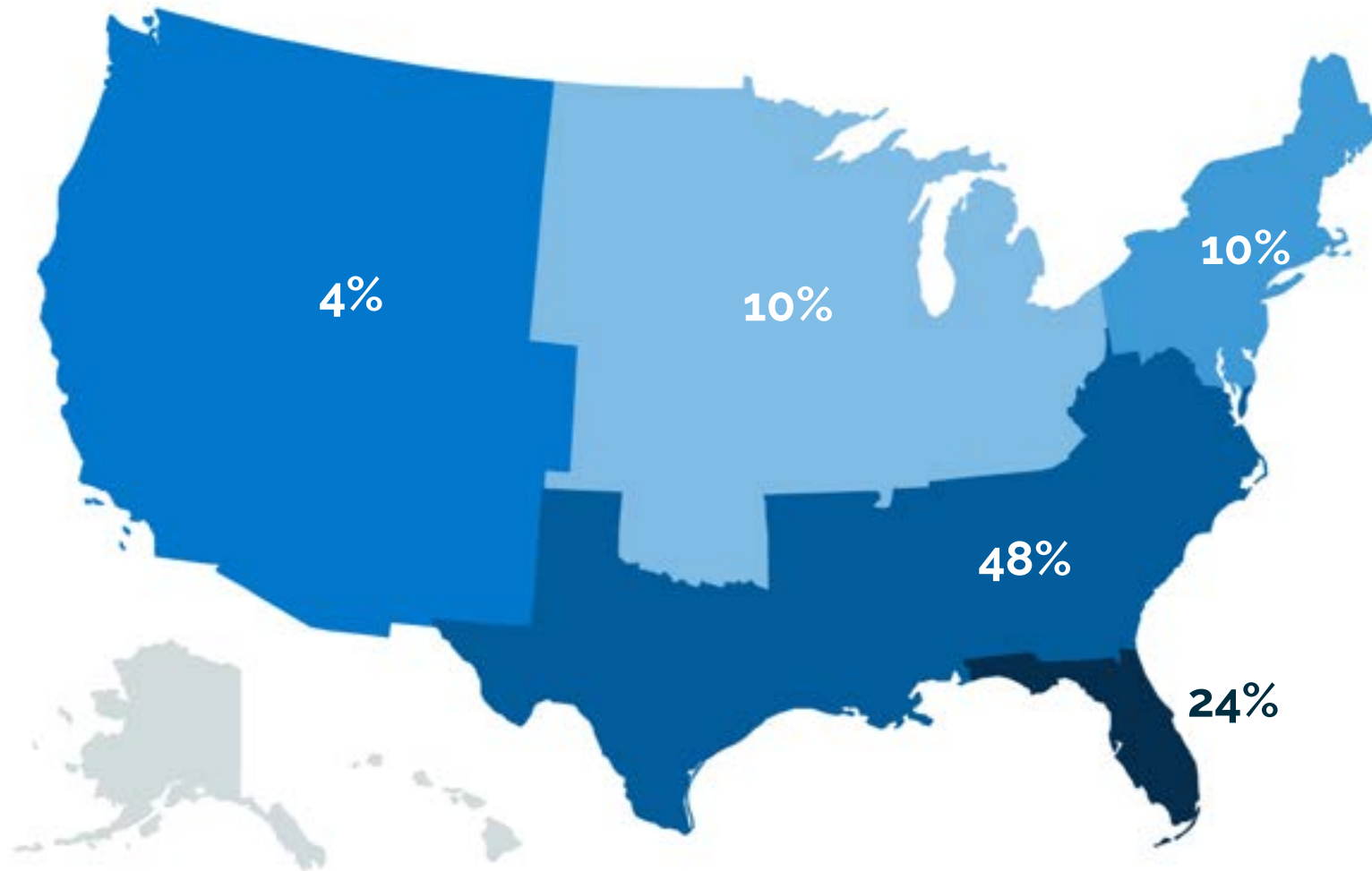
12% Magazine ad

VISITOR JOURNEY: TRAVEL PARTY PROFILE



REGIONS OF ORIGIN

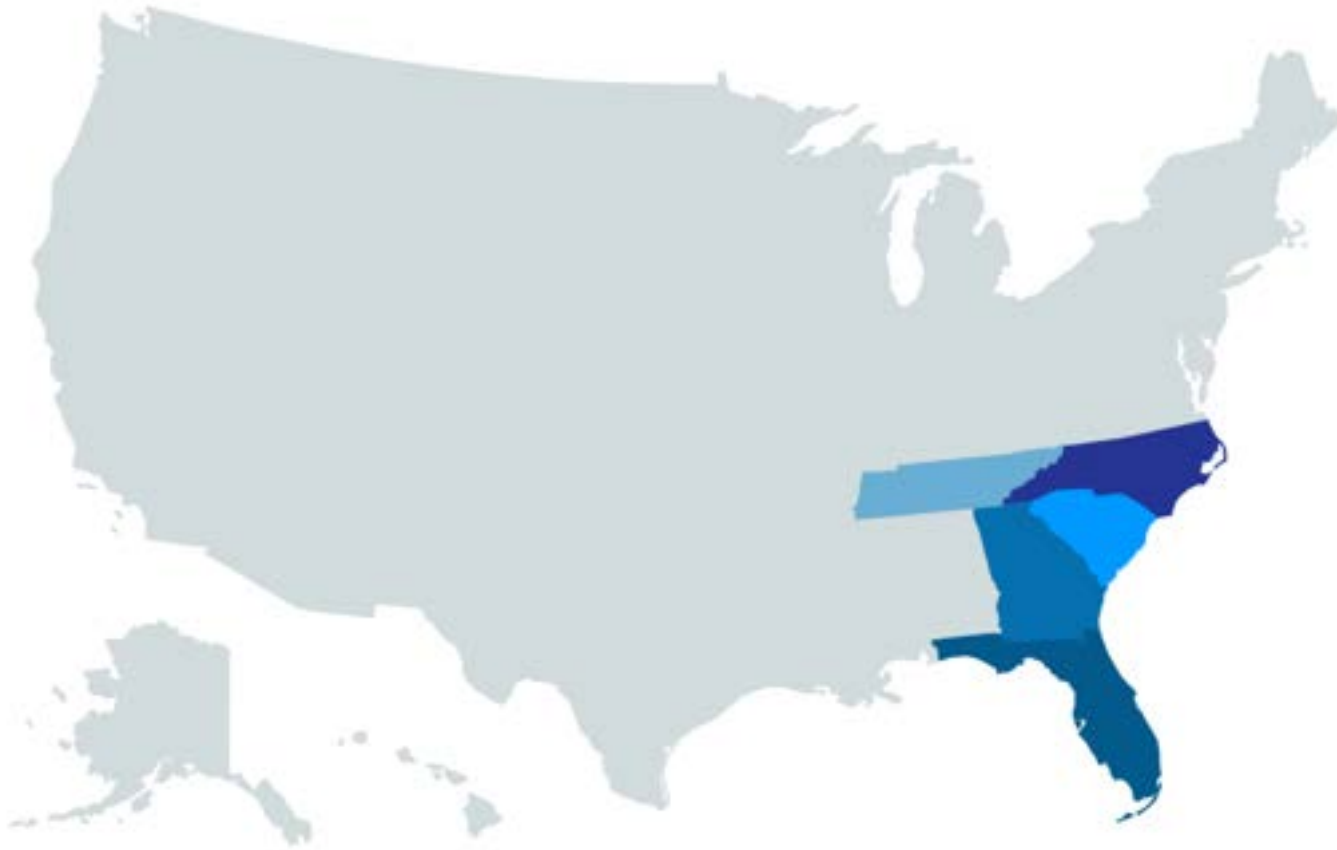
The Southeast, including Florida, accounts for over **7 in 10** visitors.



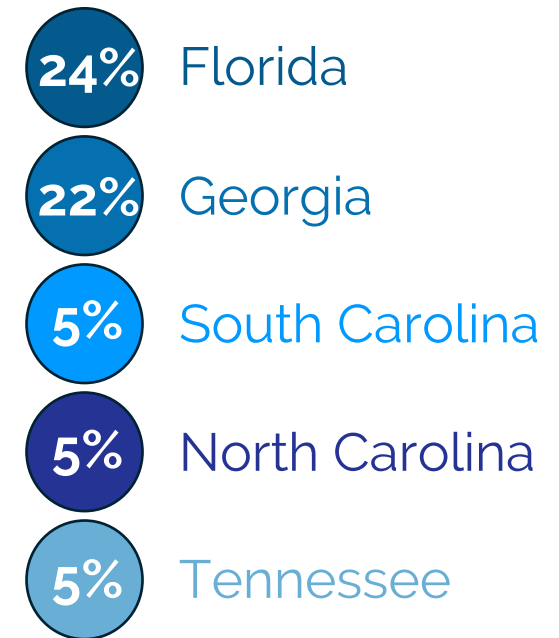
4% of visitors traveled to Amelia Island from outside of the U.S.*

* Top international markets were Canada (2%) and the UK (1%).

TOP STATES OF ORIGIN



Over **3 in 5** visitors reside in **5** states:



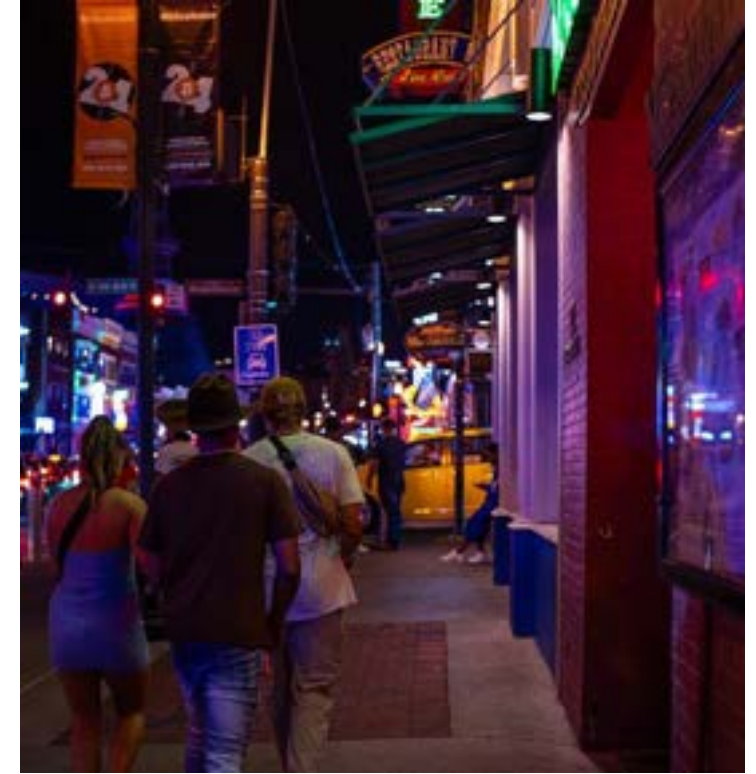
TOP MARKETS OF ORIGIN



16% Jacksonville¹



9% Atlanta²



5% Nashville²

¹Includes Jacksonville, FL and Brunswick, GA

²Markets with direct flights to Jacksonville International Airport

TRAVEL PARTIES



The typical visitor traveled in a party composed of **2.8** people



Nearly **half** of visitors traveled as a couple



Over **3 in 10** traveled with at least one person under the age of 18

VISITOR PROFILE

- » The typical Amelia Island area visitor:
 - » Is **47** years old
 - » Has an annual household income of **\$164,700**
 - » Is White/Caucasian (**88%**)

NEW & RETURNING VISITORS

- » Over **2 in 5** were first-time visitors to the Amelia Island area
- » **14%** of visitors were loyalists, having visited over 10 times



VISITOR JOURNEY: TRIP EXPERIENCE



TRANSPORTATION

- » **68%** of visitors drove to the Amelia Island area
- » **90%** of visitors who flew to Amelia Island used the **Jacksonville International Airport** (**25%** of all visitors)

LENGTH OF STAY

- » Typical visitors stayed **3.8 nights** in the Amelia Island area
- » Visitors staying in paid accommodations stayed an average of **4.0 nights** in the area

TRAVEL/LODGING CHOICES



45% Hotel/Motel/
Resort



18% Condo/Rental
House*



15% Day Tripper



12% With
Friends/Relatives

TOP ACTIVITIES DURING VISIT*



84% Restaurants



81% Beach



76% Historic Downtown
Fernandina Beach



51% Shopping

VISITING HISTORIC DOWNTOWN

- » Those who visited Historic Downtown Fernandina Beach did so an average of **2.2 times** during their stay
- » Afternoon and evening were the most common times to visit Historic Downtown
- » Nearly **9 in 10** visitors came to Historic Downtown Fernandina Beach for its dining opportunities*

*Multiple responses permitted.



TOP OFF-ISLAND ACTIVITIES*

» The top off-island activity was visiting **restaurants/breweries**, with **1 in 8** visitors to Amelia Island also visiting restaurants or breweries in Yulee, Callahan, or Hilliard



*Multiple responses permitted.

TRAVEL PARTY SPENDING

- » The typical travel party spent **\$592** per day and **\$2,250** during their trip
- » The typical visitor spent **\$211** per day and **\$803** during their trip

VISITOR JOURNEY: POST-TRIP



VISITOR SATISFACTION

- » Nearly **all** visitors were **satisfied** with their trip to Amelia Island (83% were very satisfied)
- » Nearly **all** visitors would **recommend** the area to others (79% would definitely recommend the area)
- » **98%** of visitors will **return** to the Amelia Island area (68% will definitely return)



BEACH RATINGS

- » **97%** of visitors rated Amelia Island's beaches as **excellent or very good overall** (74% rated them as excellent)
- » **96%** of visitors rated the **cleanliness** of Amelia Island's beaches as **excellent or very good** (82% rated it as excellent)



WHY VISITORS CHOSE AMELIA ISLAND*



"We came for the golf and stayed for the beauty, serenity, and fine dining."



"The online descriptions made it sound quieter and more peaceful than other beach towns."



"Family and friends couldn't recommend it highly enough!"



*Open-ended responses.
Based on visitors traveling for leisure.

DETAILED FINDINGS



QUARTERLY METRICS

	July – September 2023 ^{1,2}	July – September 2024	% Δ
Visitors	232,200	222,700	-4.1%
Visitor Days	859,140	846,260	-1.5%
Direct Spending	\$182,866,400	\$186,373,100	+1.9%
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¹This data has been modeled to include all visitors for comparative purposes. Previous data only reported visitors staying in paid accommodations.

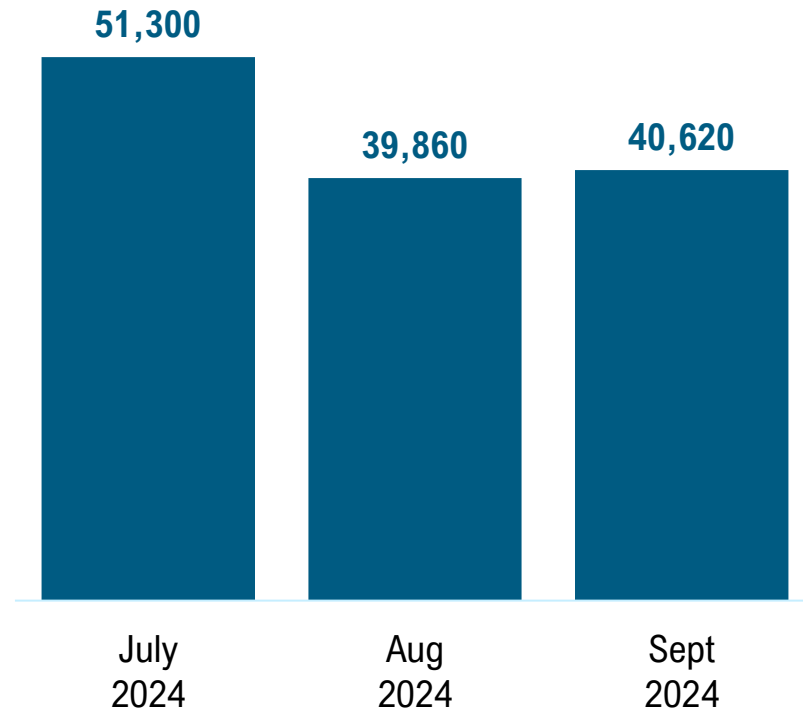
²Previous data revised to reflect updated FY2023 Q4 accommodations figures.

³An IMPLAN multiplier of 1.32 was used for both FY2023 and FY2024.

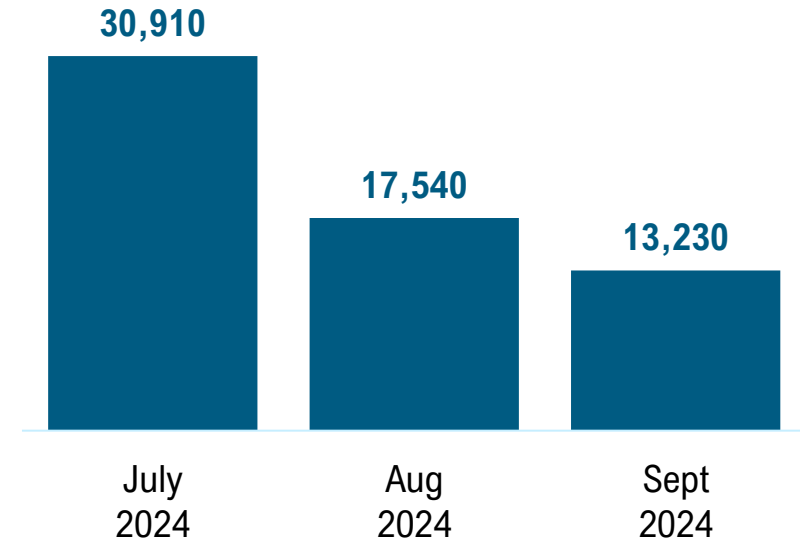
⁴Sources: Research Data Services, Key Data, Smith Travel Research, Florida Department of Business and Professional Regulation.

MONTHLY ROOM NIGHTS*

Hotel Room Nights



Vacation Rental Room Nights



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

MONTHLY VISITOR COUNTS

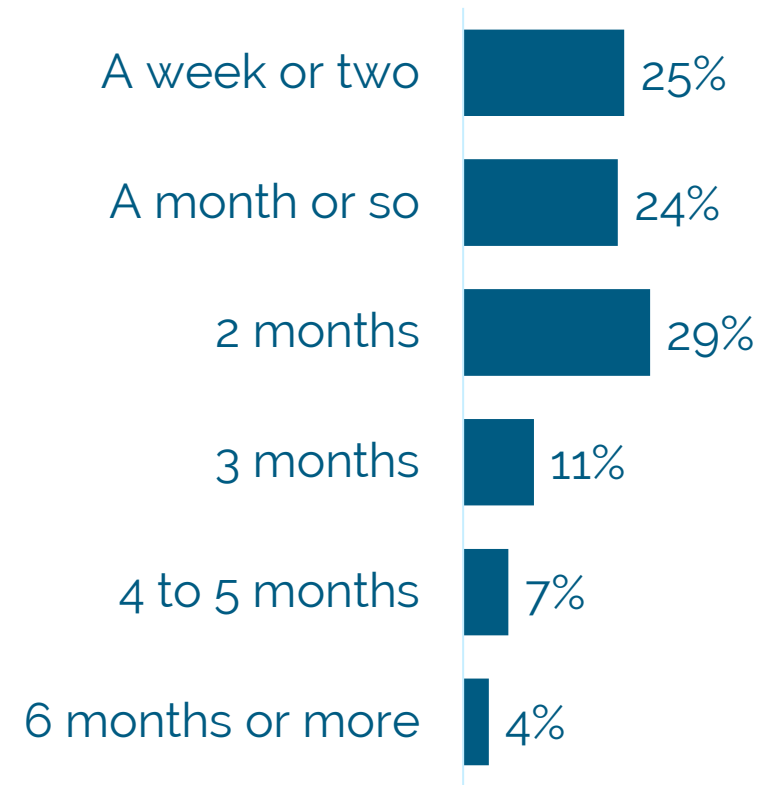
Accommodation Type	July Visitors	August Visitors	September Visitors
Hotel/motel/resort	38,610	30,000	31,590
Day tripper	21,250	12,190	11,360
Non-paid accommodations*	16,990	13,200	13,900
Vacation rental	12,960	10,060	10,590
Total	89,810	65,450	67,440

VISITOR JOURNEY: PRE-VISIT



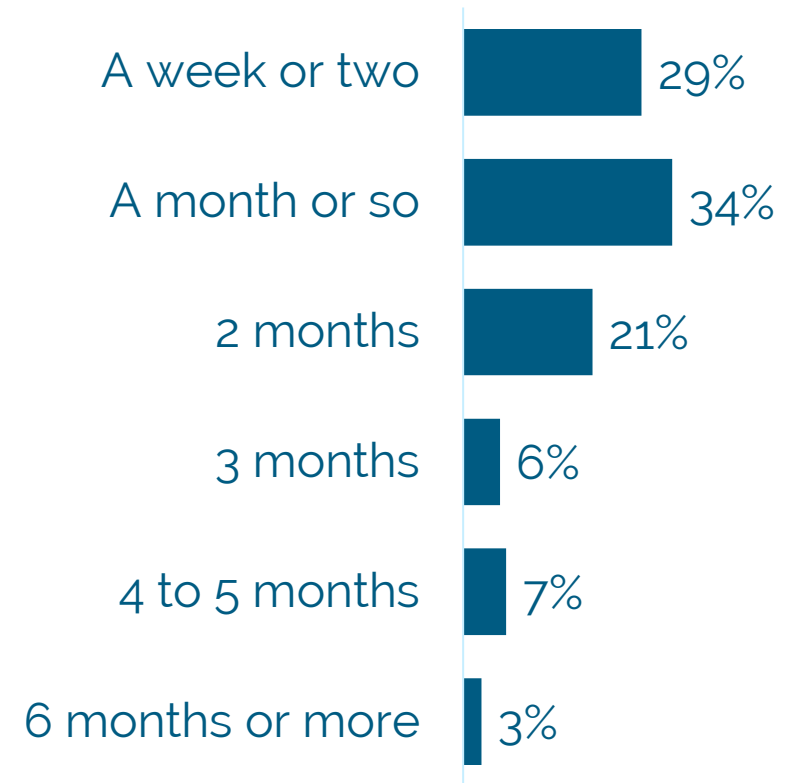
TRIP PLANNING CYCLE*

- » Leisure visitors to Amelia Island have short trip planning windows, as nearly **half** planned their trip to the area **1 month or less in advance**
- » On the other hand, over **1 in 5** leisure visitors planned their trip **3 or more months in advance**
- » On average, leisure visitors began planning **31 days** before their trip
- » Leisure visitors staying in paid accommodations began planning **33 days** before their trip



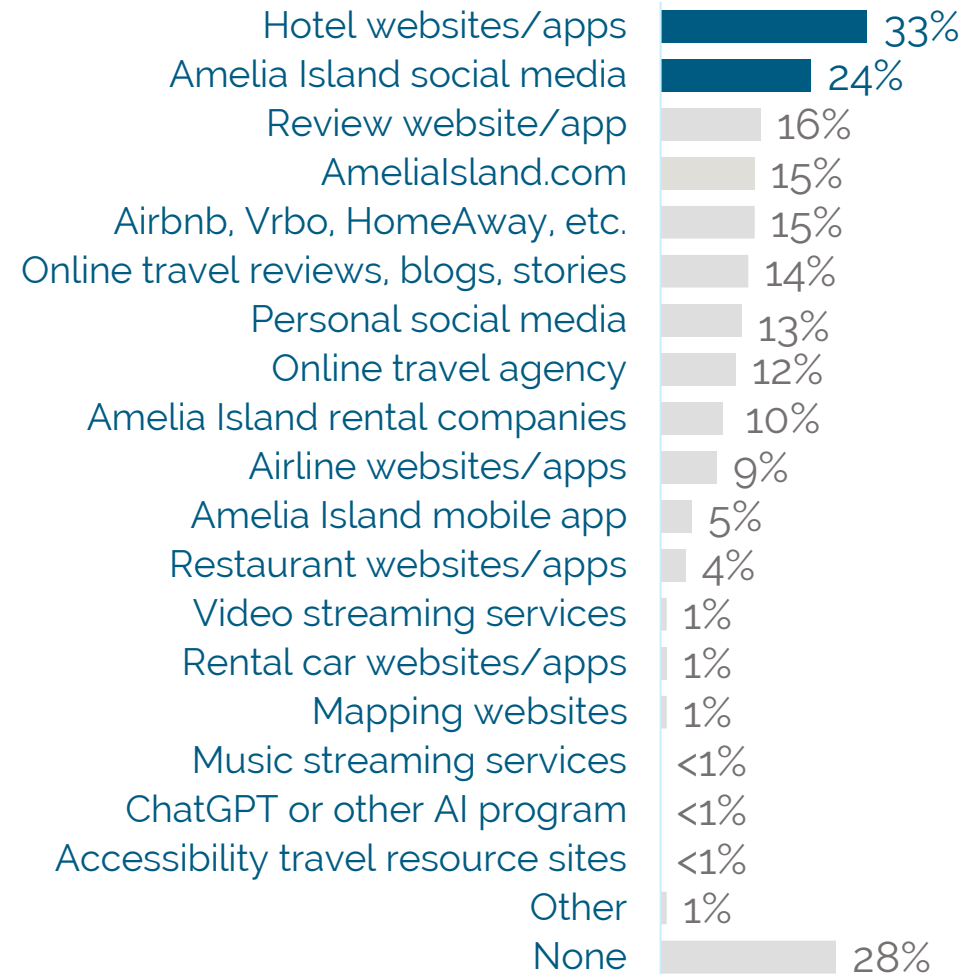
TRIP BOOKING CYCLE*

- » Over **3 in 5** leisure visitors booked their trip to the Amelia Island area **a month or less in advance**
- » **1 in 6** booked their trip **3 or more months in advance**
- » On average, leisure visitors booked their trip **24 days** before their arrival
- » Leisure visitors staying in paid accommodations booked **25 days** before their arrival



ONLINE TRIP PLANNING SOURCES*

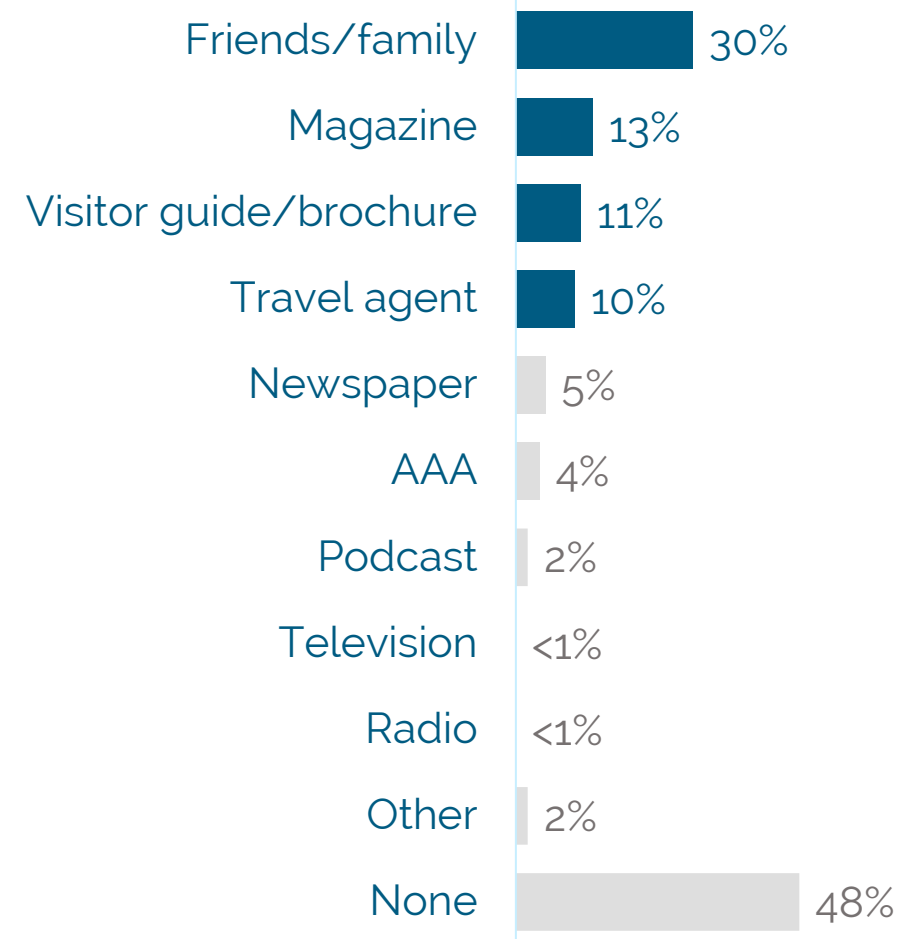
- » Hotel websites/apps were the **number one online planning source** for leisure trips to Amelia Island, used by over **3 in 10** leisure visitors
- » **Amelia Island's social media** was also a strong trip planning source, used by nearly **1 in 4** leisure visitors



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

OTHER TRIP PLANNING SOURCES*

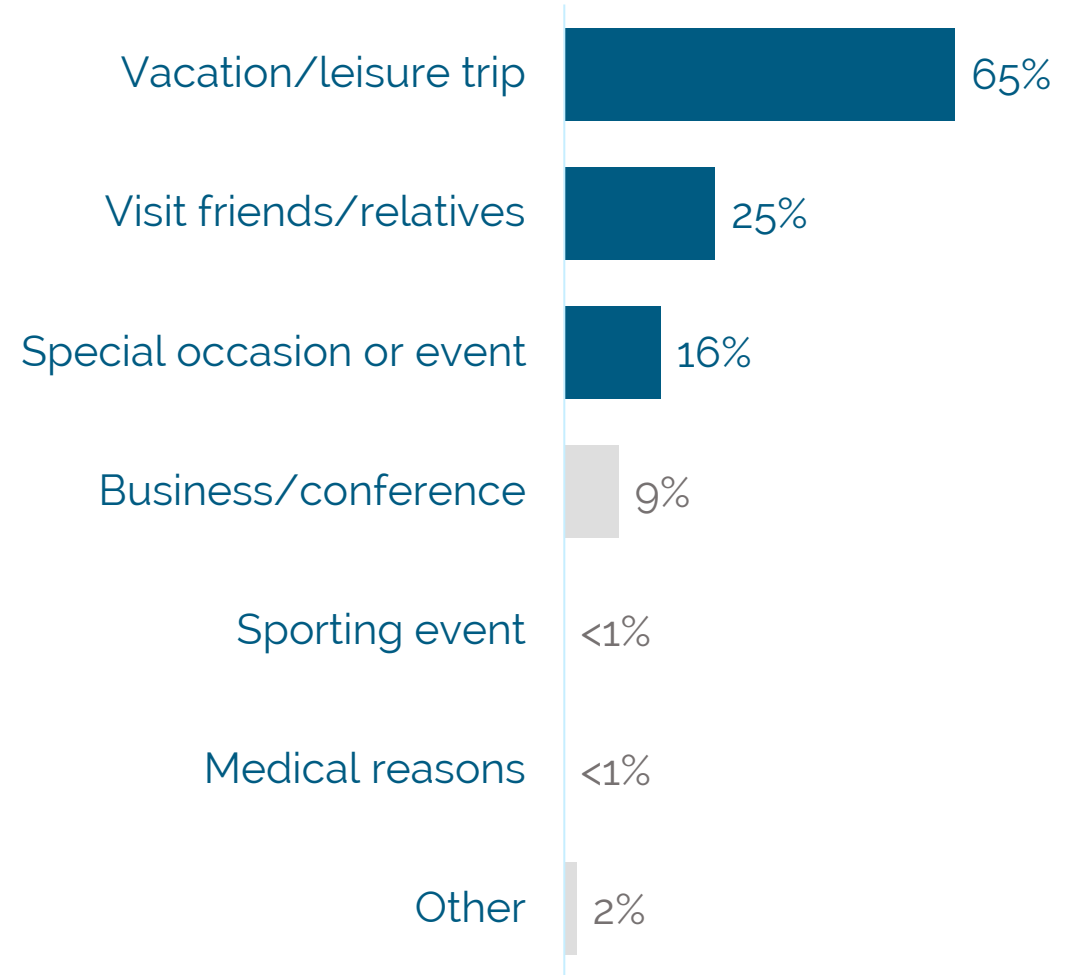
- » **3 in 10** leisure visitors planned their trip to the Amelia Island area by talking to **friends or family**
- » Traditional planning sources such as **magazines** (used by over **1 in 8** leisure visitors) and **visitor guides/brochures** (used by nearly **1 in 8** leisure visitors) were also popular



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

REASONS FOR VISITING*

- » **Nearly 2 in 3** visitors came to Amelia Island for a **vacation/leisure trip**
- » **1 in 4** came to **visit friends and relatives**
- » **1 in 6** visitors came for a **special occasion or event**

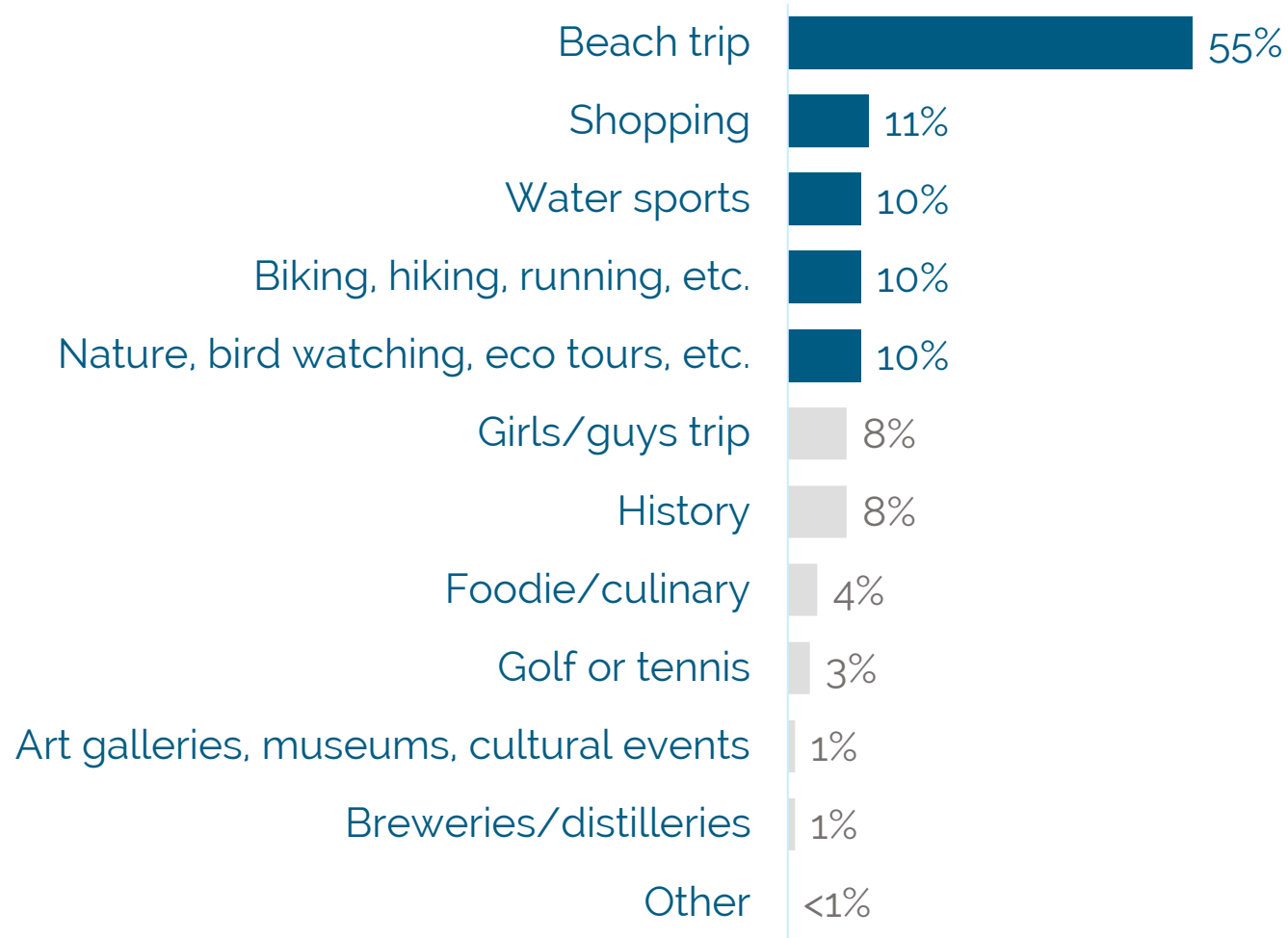


OPEN-ENDED REASONS FOR VISITING*



- » "The descriptions we read online made it sound quieter and more peaceful than other beach towns."
- » "We came for the golf and stayed for the beauty, serenity, and fine dining."
- » "There is less of a kid and young adult crowd here. It makes for a more chill environment."
- » "Other beach destinations were 2-3 times more expensive!"
- » "We like the historical attractions here, in addition to the beaches and downtown."
- » "Family and friends couldn't recommend it highly enough!"

TYPE OF VACATION/LEISURE TRIP*



*Up to 3 responses permitted.
Based on all visitors traveling for leisure.

TYPE OF SPECIAL OCCASION OR EVENT*

Wedding/honeymoon 7%

Birthday/anniversary 5%

Reunion 3%

Festival <1%

Concert <1%

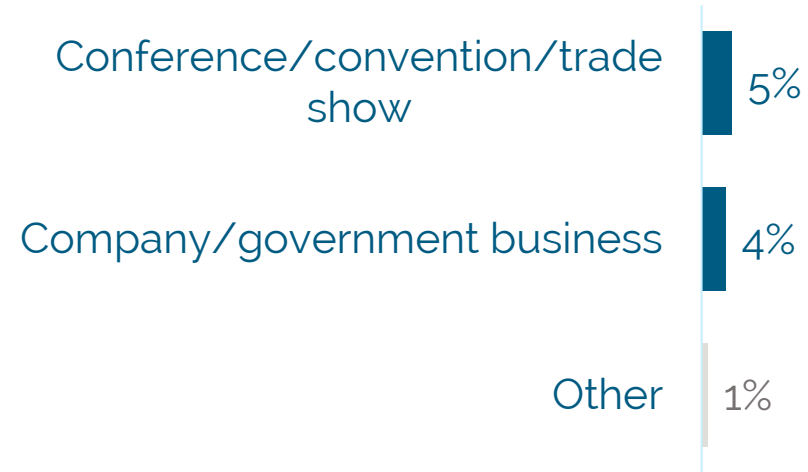
Performing arts <1%

Sporting event <1%

Dining Month <1%

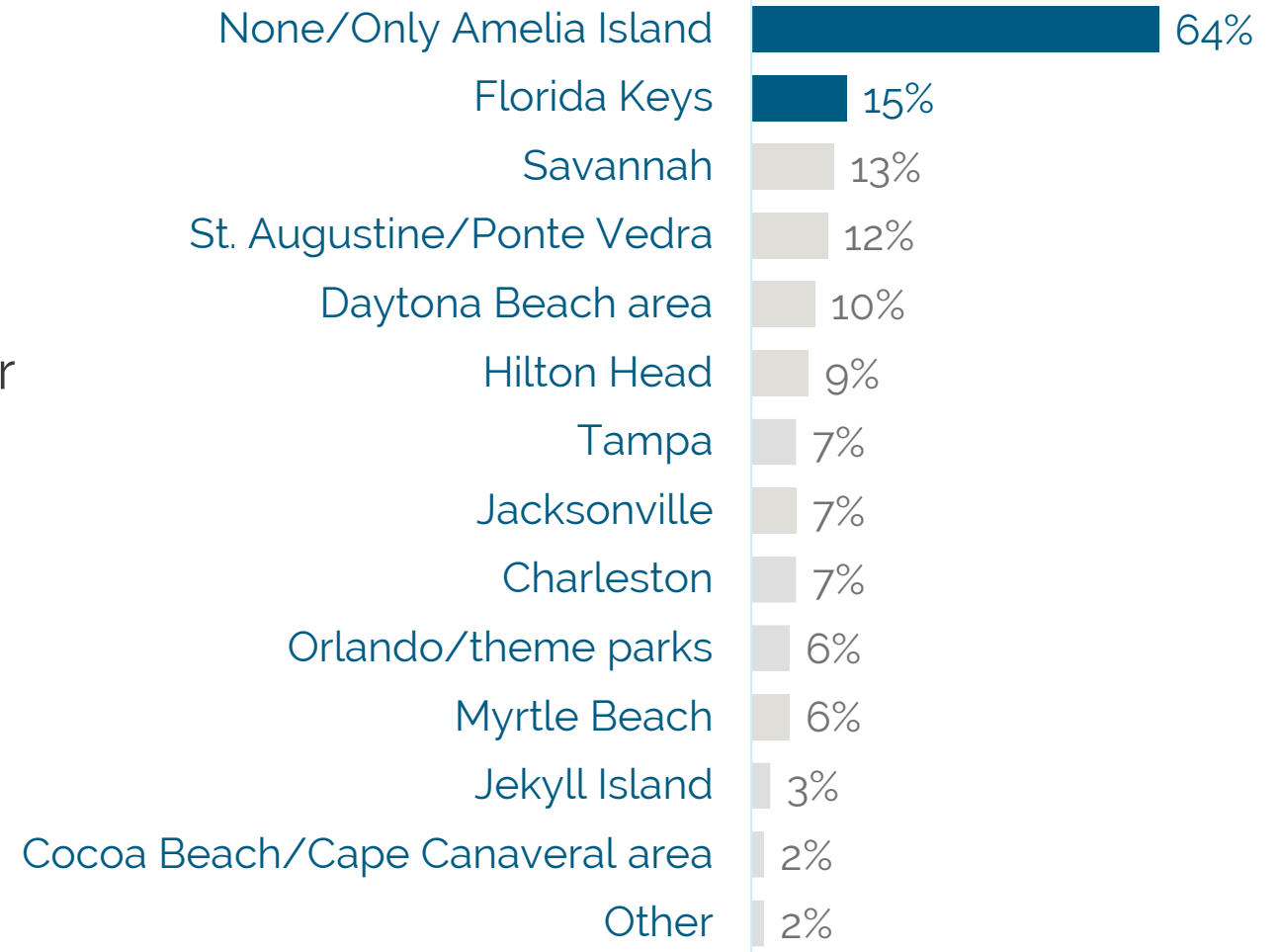
2%

TYPE OF BUSINESS/CONFERENCE*



OTHER DESTINATIONS CONSIDERED*

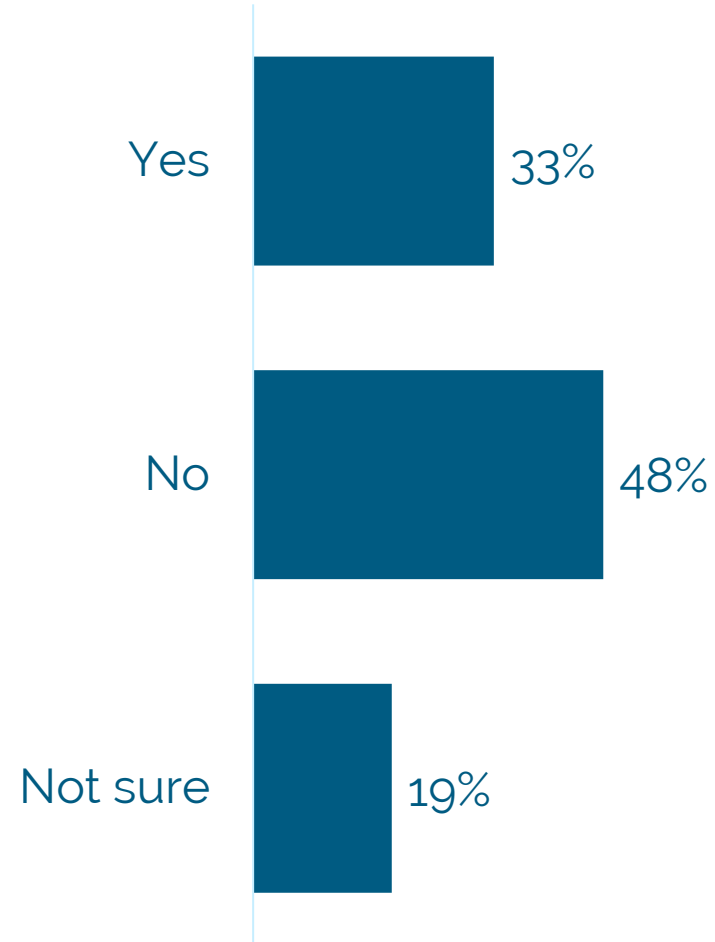
- » Nearly **2 in 3** leisure visitors to the Amelia Island area did not consider visiting any other destinations
- » Nearly **1 in 6** leisure visitors to the area also considered visiting the **Florida Keys**



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

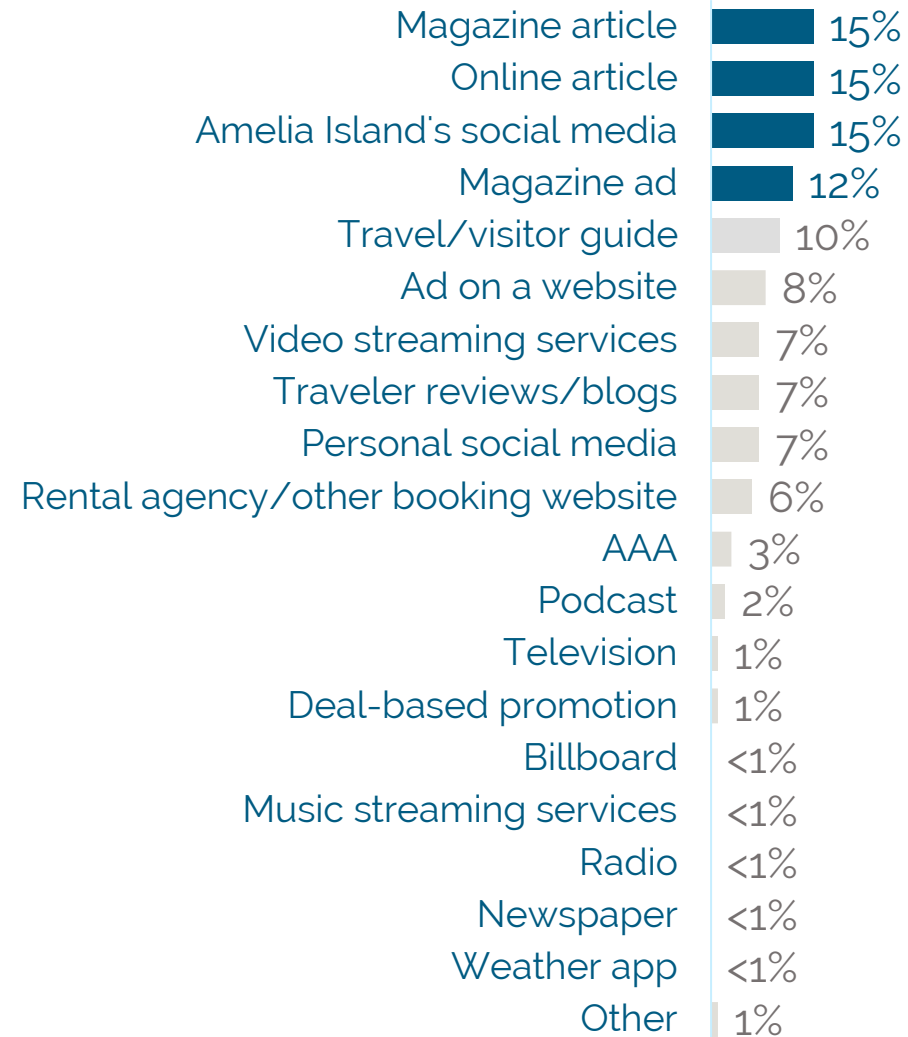
ADVERTISING RECALL*

» **1 in 3** leisure visitors recalled seeing advertising about the Amelia Island area



ADVERTISING SOURCES*

- » Out of **all** leisure visitors, nearly **1 in 6** recalled seeing advertising in a **magazine article**, in an **online article**, or on **Amelia Island's social media**
- » **1 in 8** saw a **magazine advertisement**
- » This information influenced **15%** of **all leisure visitors** to visit the Amelia Island area

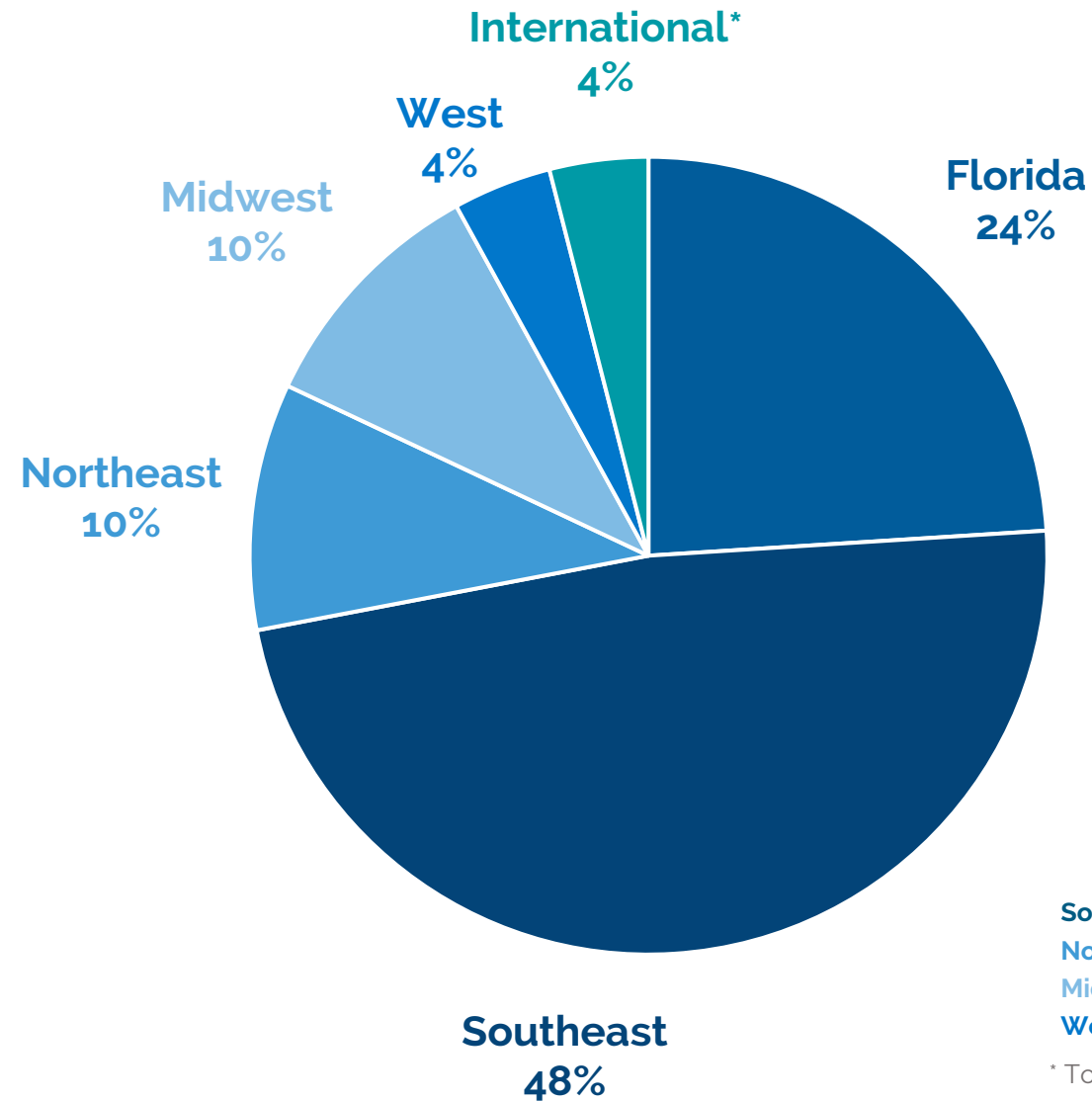


*Multiple responses permitted.
Based on all visitors traveling for leisure.

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

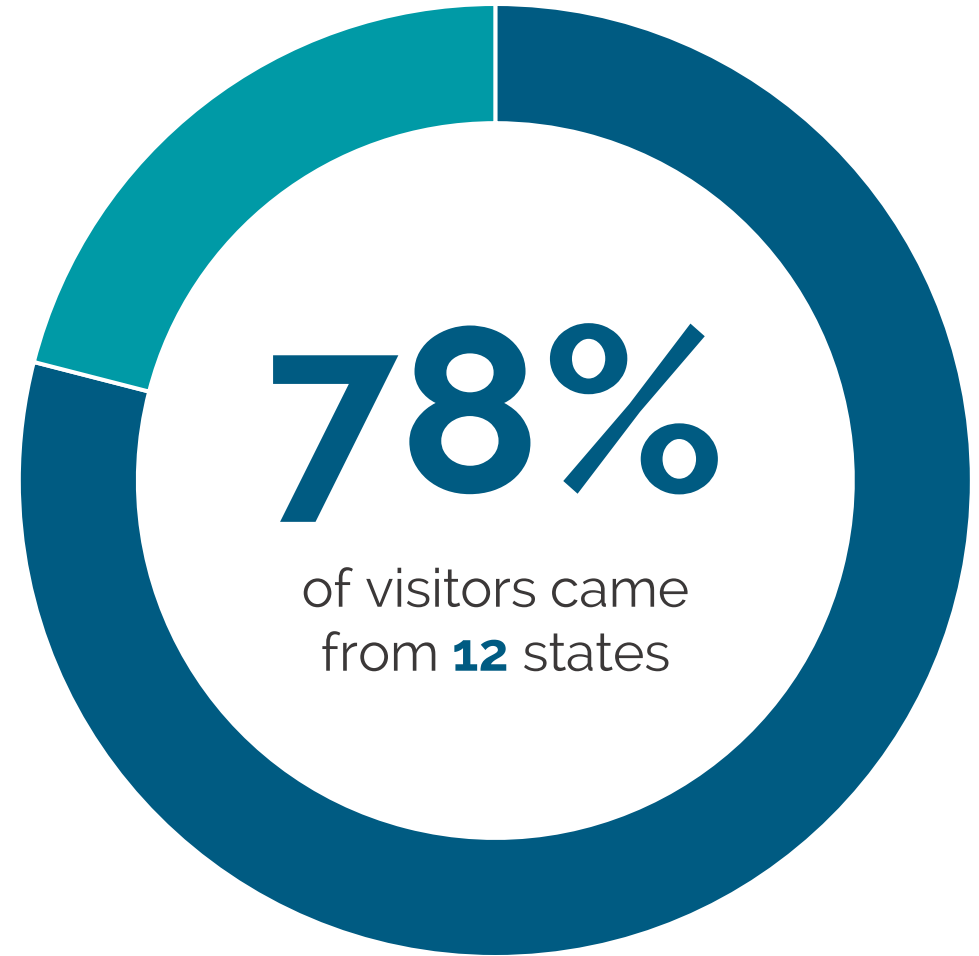
West: WA, OR, CA, NV, ID, MT, WY, CO, UT, AZ, NM, AK, HI

* Top international markets include Canada (2%) and the UK (1%).

STATE OF ORIGIN

Top States of Origin 2024

Florida	24%
Georgia	22%
North Carolina	5%
South Carolina	5%
Tennessee	5%
Mississippi	4%
Ohio	3%
Illinois	2%
Maryland	2%
Massachusetts	2%
New Jersey	2%
Texas	2%



TOP ORIGIN MARKETS

Top Origin Markets – All Visitors

Jacksonville*	16%
Atlanta**	9%
Nashville**	5%
Charlotte**	4%
Orlando-Daytona Beach-Melbourne	4%
New York**	3%
Tallahassee-Thomasville***	3%
Tampa-St. Petersburg	3%
Boston**	2%
Chattanooga	2%
Savannah	2%
Washington, D.C.-Hagerstown**	2%
West Palm Beach-Ft. Pierce	2%

Top Origin Markets – Overnight Visitors

Atlanta**	10%
Jacksonville*	10%
Nashville**	6%
Charlotte**	4%
Orlando-Daytona Beach-Melbourne	4%
Boston**	3%
New York**	3%
Tallahassee-Thomasville	3%
Tampa-St. Petersburg	3%
Baltimore**	2%
Chattanooga	2%
Chicago**	2%
Cincinnati**	2%
Columbia, SC	2%
Philadelphia**	2%
Savannah	2%
Washington, D.C.-Hagerstown**	2%
West Palm Beach-Ft. Pierce	2%

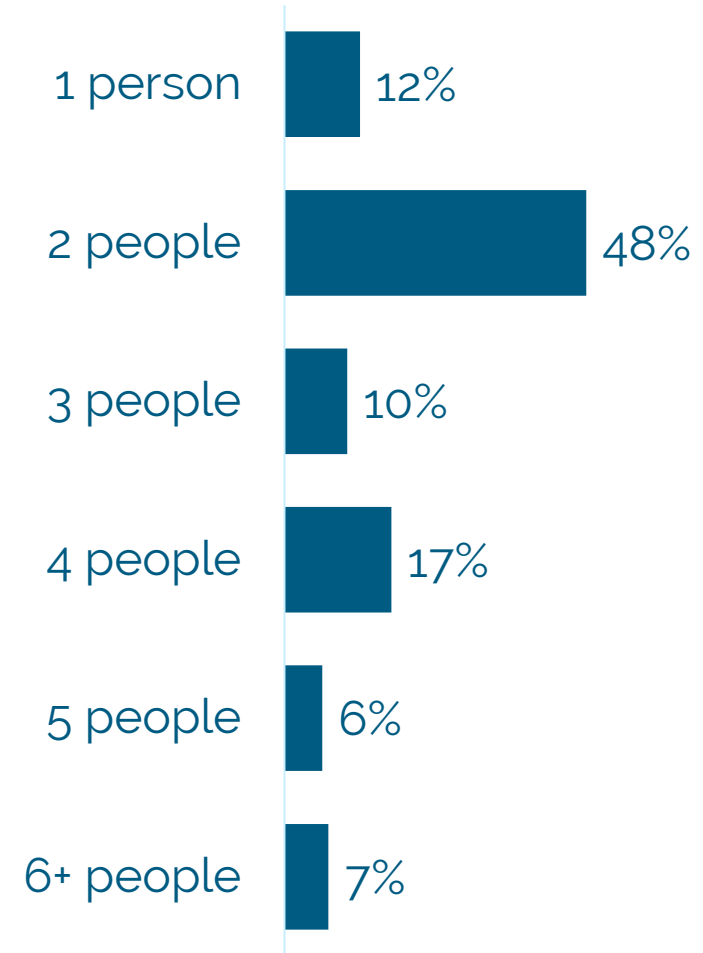
*Includes Jacksonville, FL and Brunswick, GA.

**Markets with direct flights to Jacksonville International Airport.

***Includes counties surrounding Tallahassee, FL and Thomasville, GA.

TRAVEL PARTY SIZE

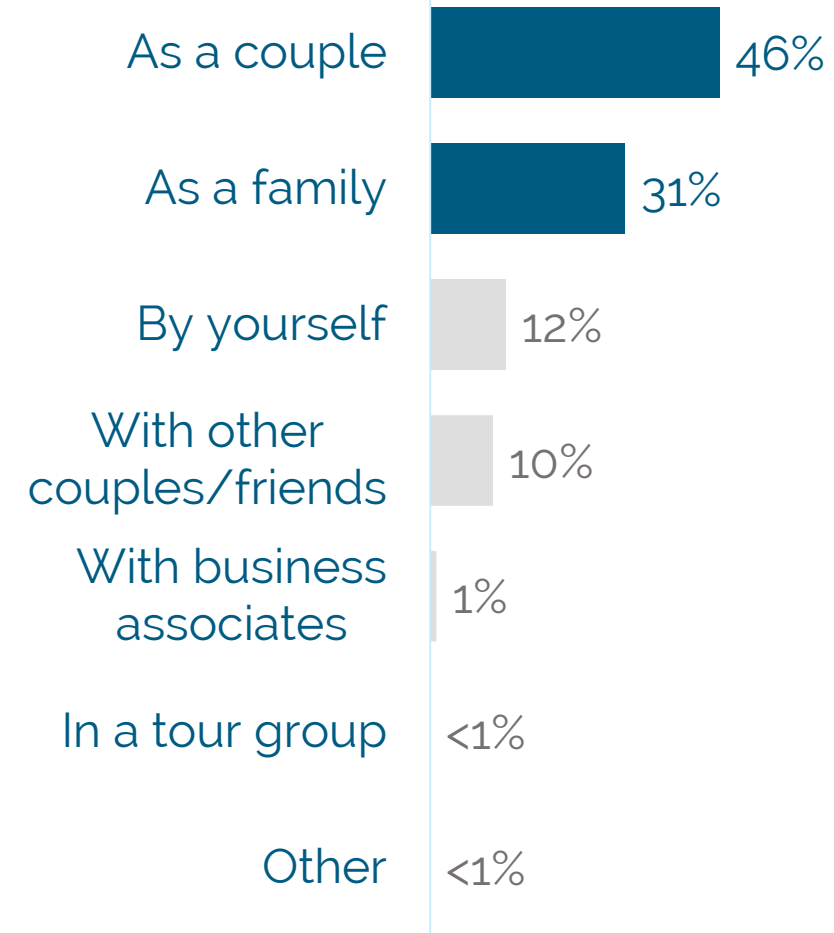
» The typical travel party size was **2.8**



TRAVEL PARTY TYPE

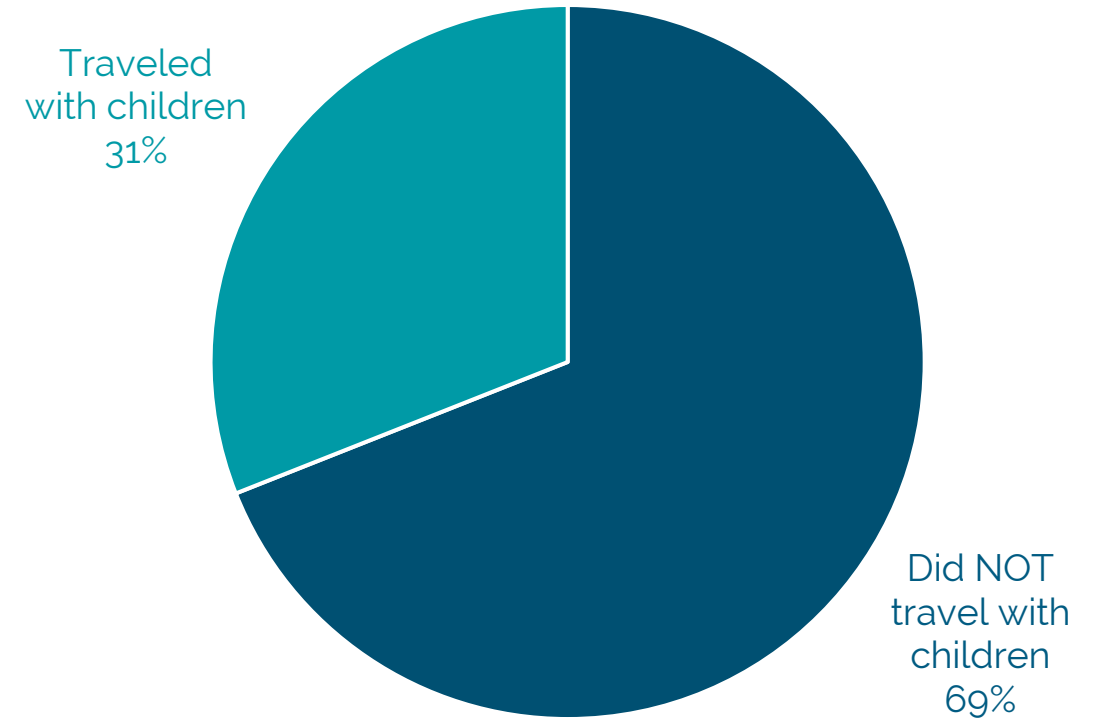
» Nearly **half** of visitors to the Amelia Island area traveled **as a couple**

» Over **3 in 10** visitors traveled **as a family**



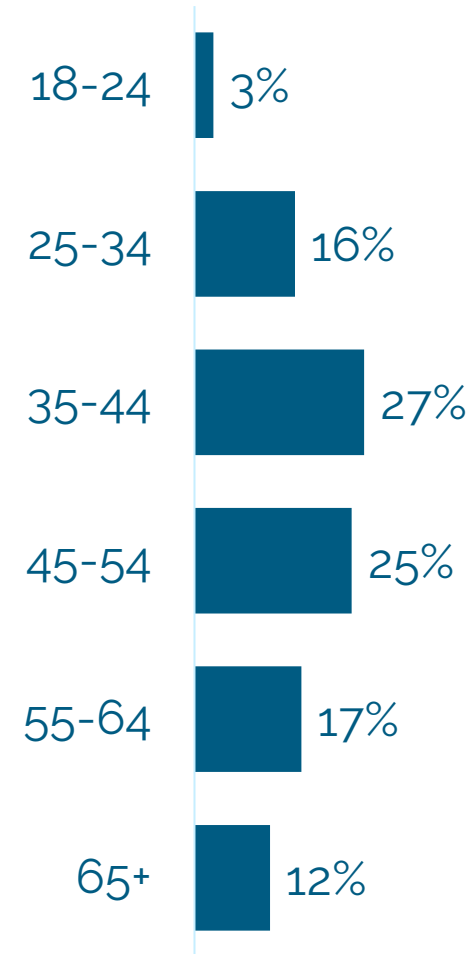
TRAVELED WITH CHILDREN

» Over **3 in 10** travel parties included children under the age of 18



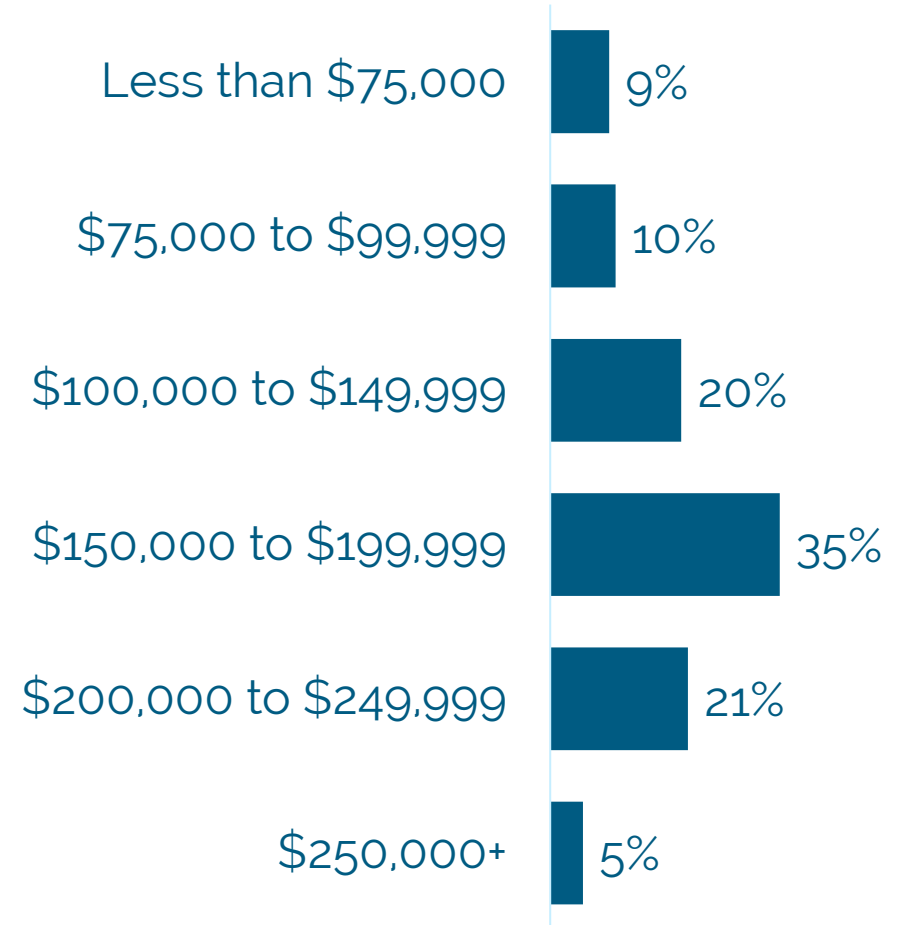
AGE

» The median age of visitors to the Amelia Island area was **47**



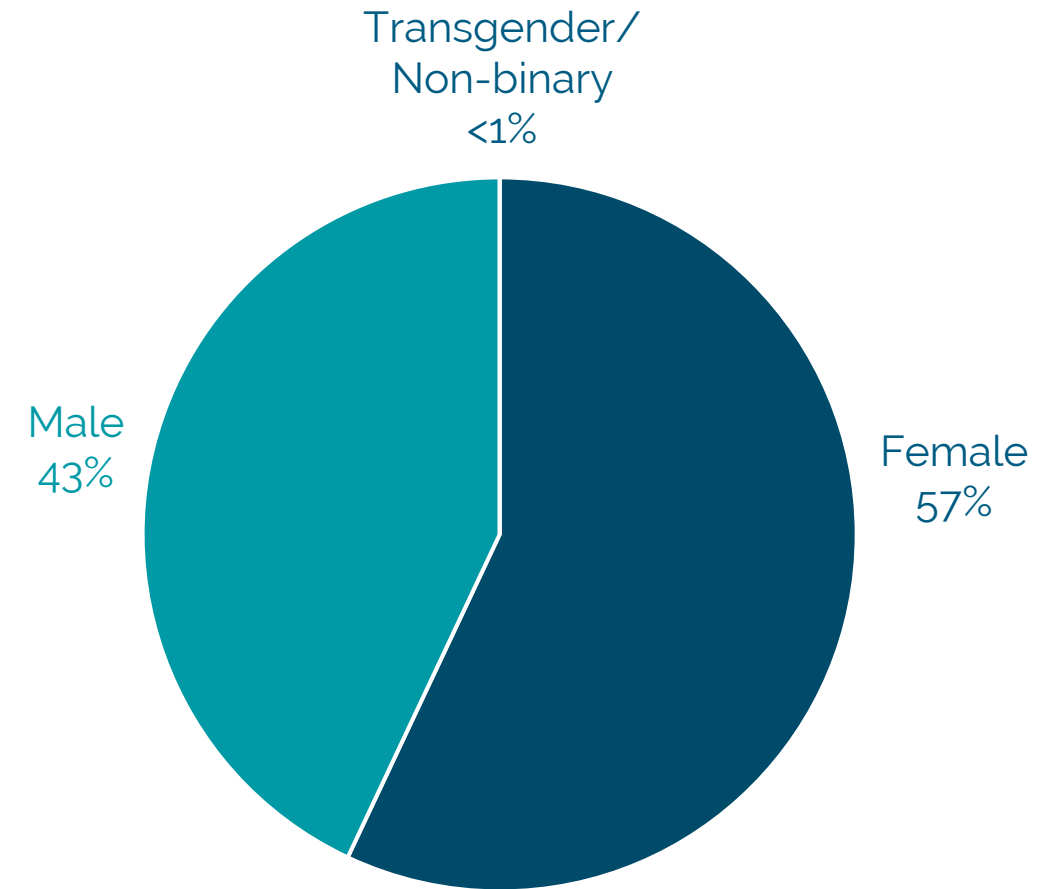
HOUSEHOLD INCOME

- » Visitors to the Amelia Island area had a median annual household income of **\$164,700**
- » Over **3 in 5** visitors had household incomes over **\$150,000**



GENDER

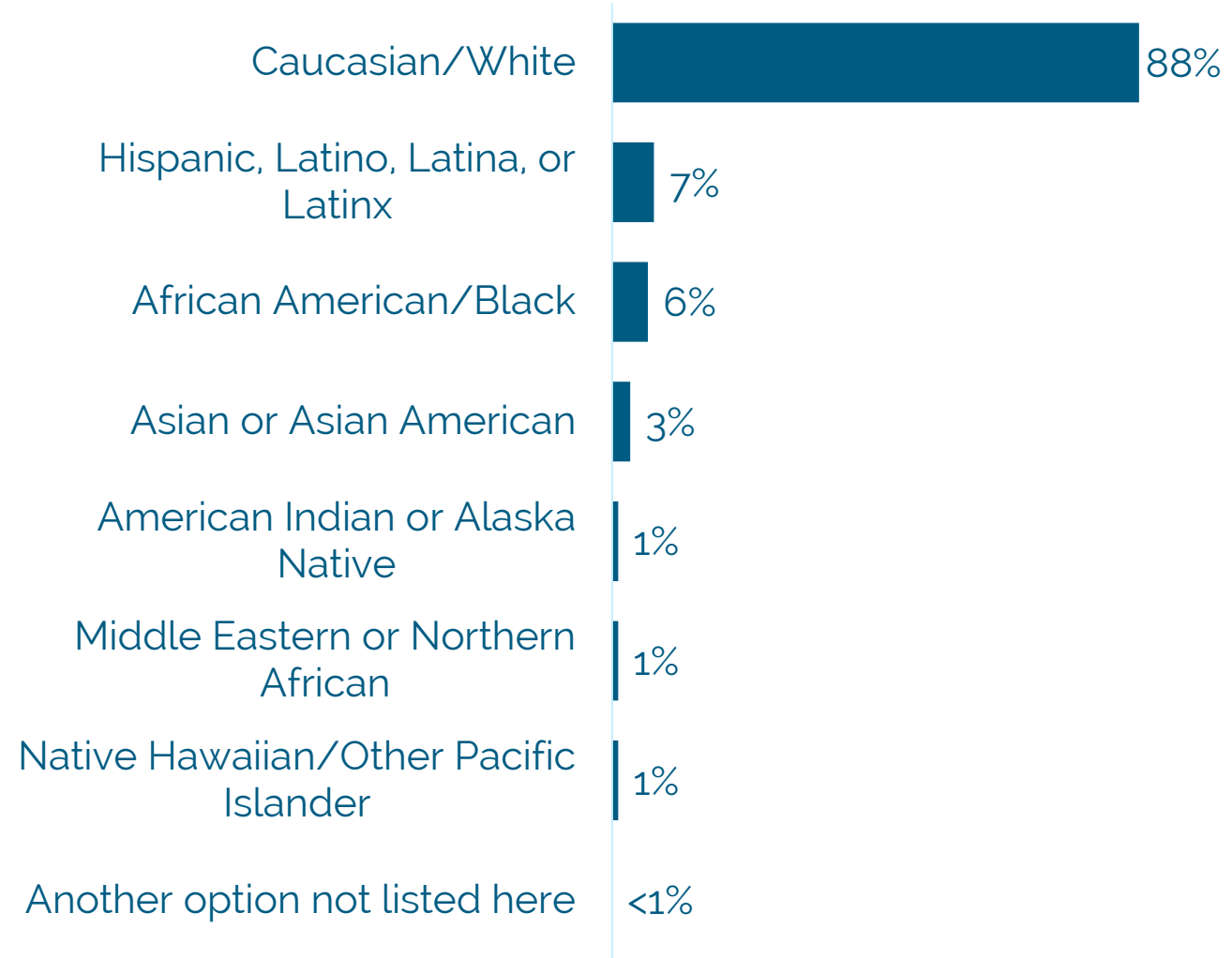
» **57%** of visitors interviewed were **female***



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

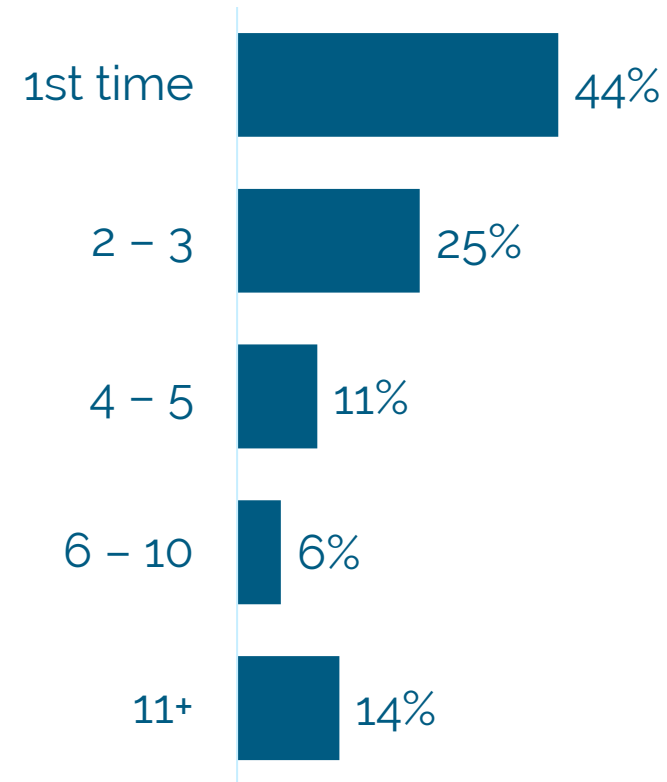
RACE*

» Nearly **9 in 10** visitors to the Amelia Island area were **Caucasian/White**



NEW & RETURNING VISITORS

- » Over **2 in 5** visitors said **this was their first time visiting** the Amelia Island area
- » Nearly **1 in 8** visitors were loyalists, having visited **over 10 times**

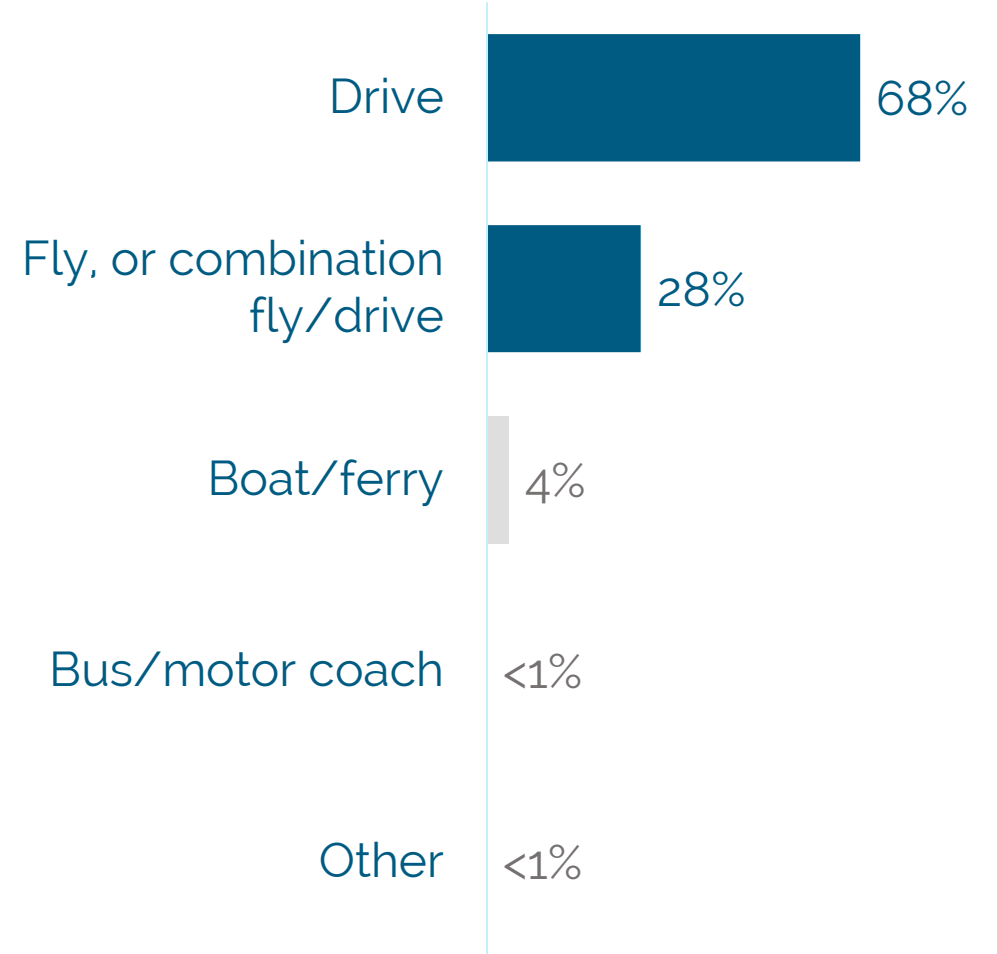


VISITOR JOURNEY: TRIP EXPERIENCE



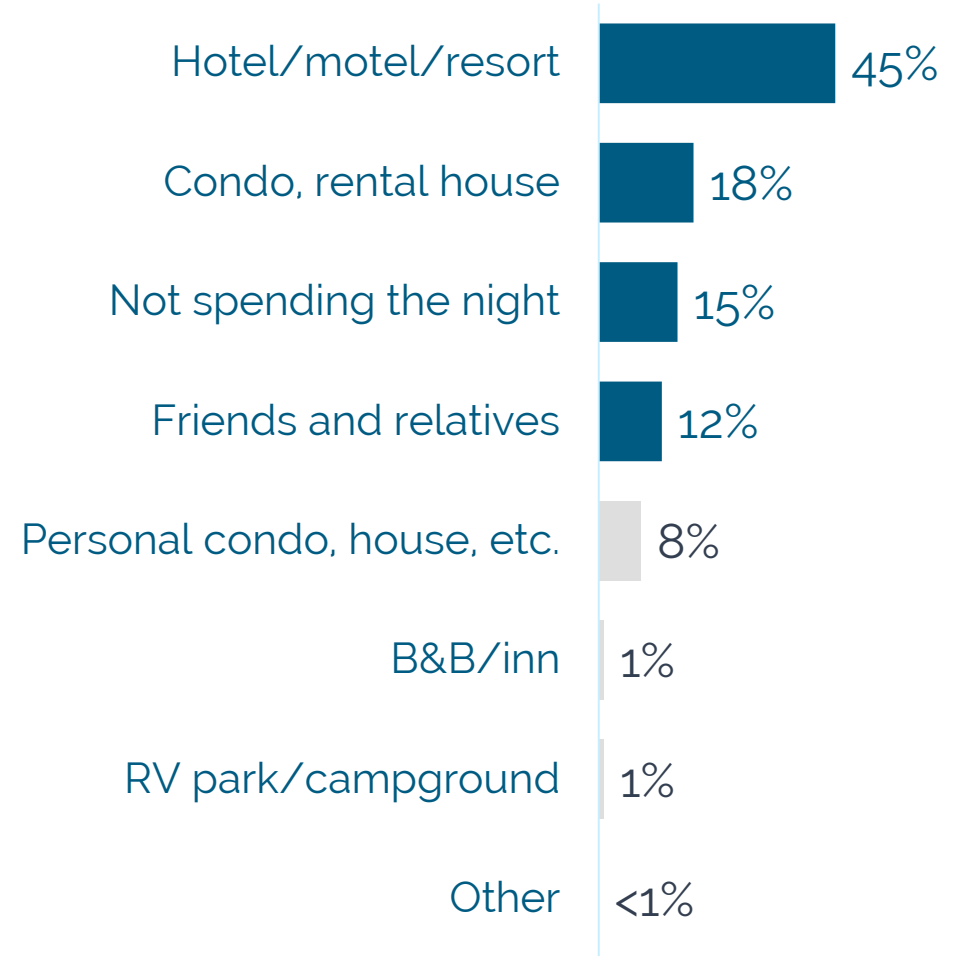
TRANSPORTATION

- » Nearly **7 in 10** visitors **drove** to the Amelia Island area
- » **90%** of visitors who flew to the area used the **Jacksonville International Airport** (**25%** of all visitors)



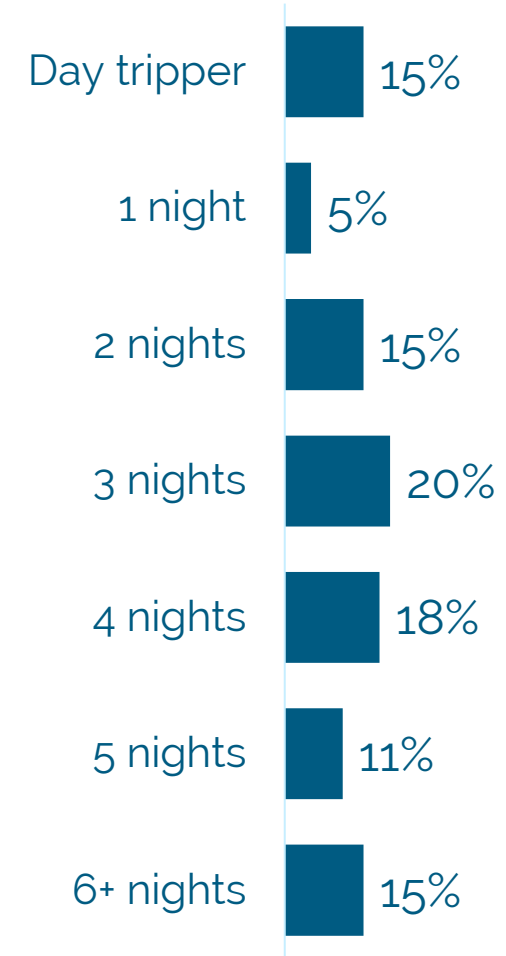
ACCOMMODATIONS

- » Nearly **half** of visitors stayed overnight in a **hotel, motel, or resort**
- » Nearly **1 in 6** stayed at a **condo or rental house**
- » Nearly **1 in 6** did not stay overnight
- » **1 in 8** stayed with **friends and relatives**



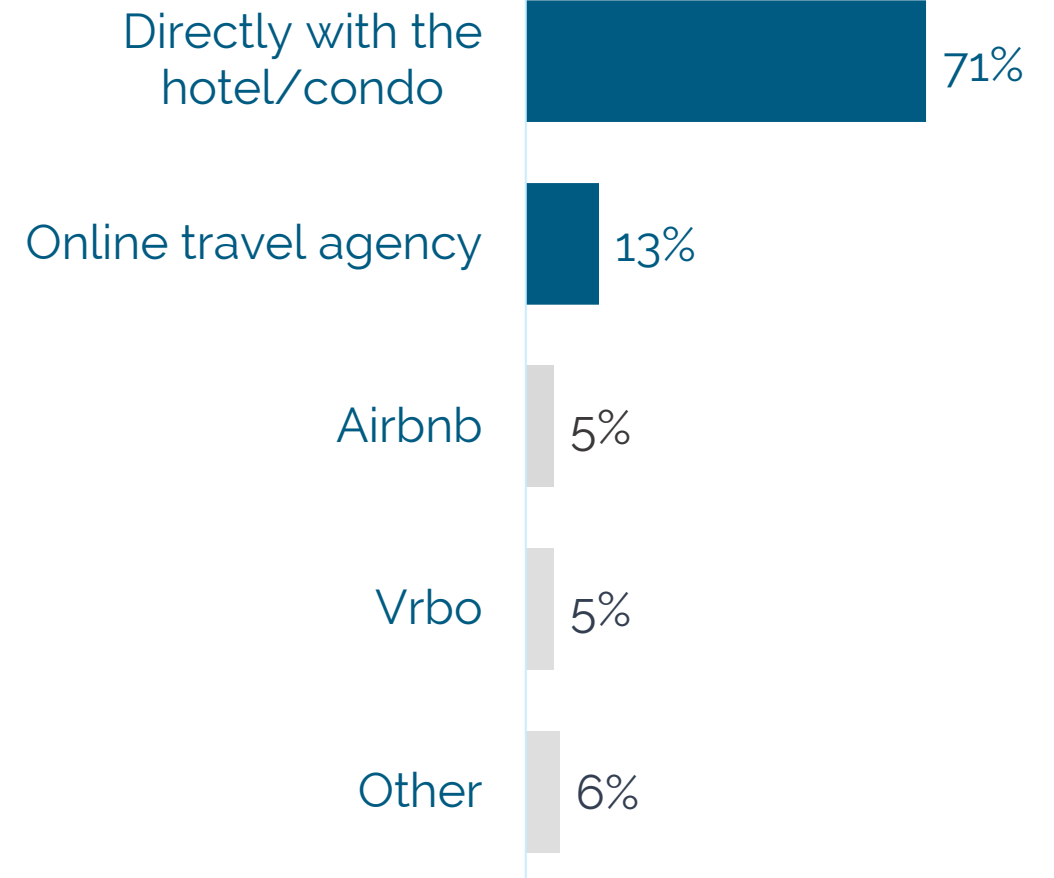
NIGHTS STAYED

- » Typical visitors stayed **3.8 nights** in the Amelia Island area
- » Typical visitors staying in paid accommodations stayed **4.0 nights** in the Amelia Island area



ACCOMMODATION BOOKING

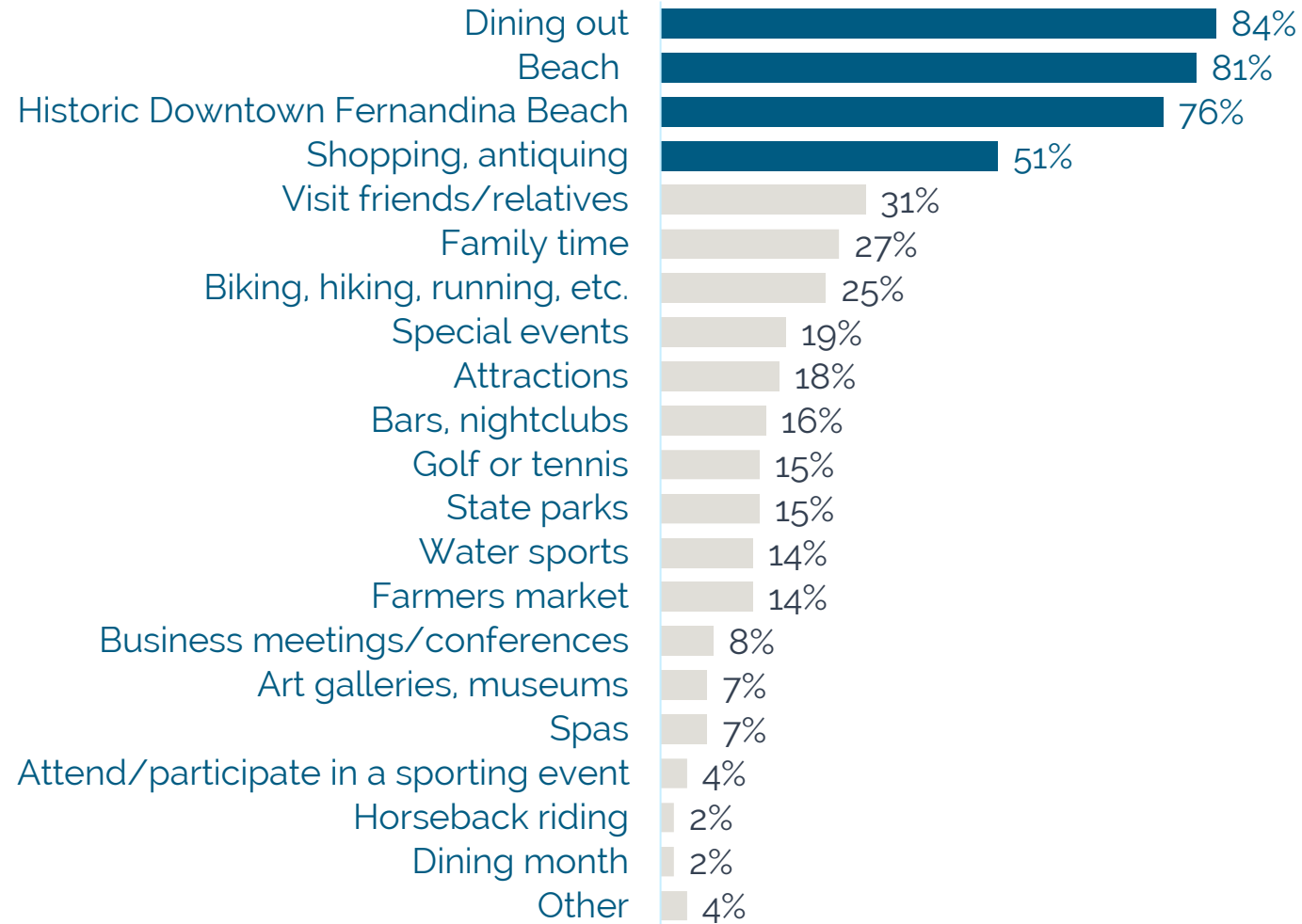
- » Nearly **3 in 5** visitors booked their trip to the Amelia Island area **directly with the hotel/condo**
- » Over **1 in 8** visitors booked through **an online travel agency**



VISITOR ACTIVITIES*

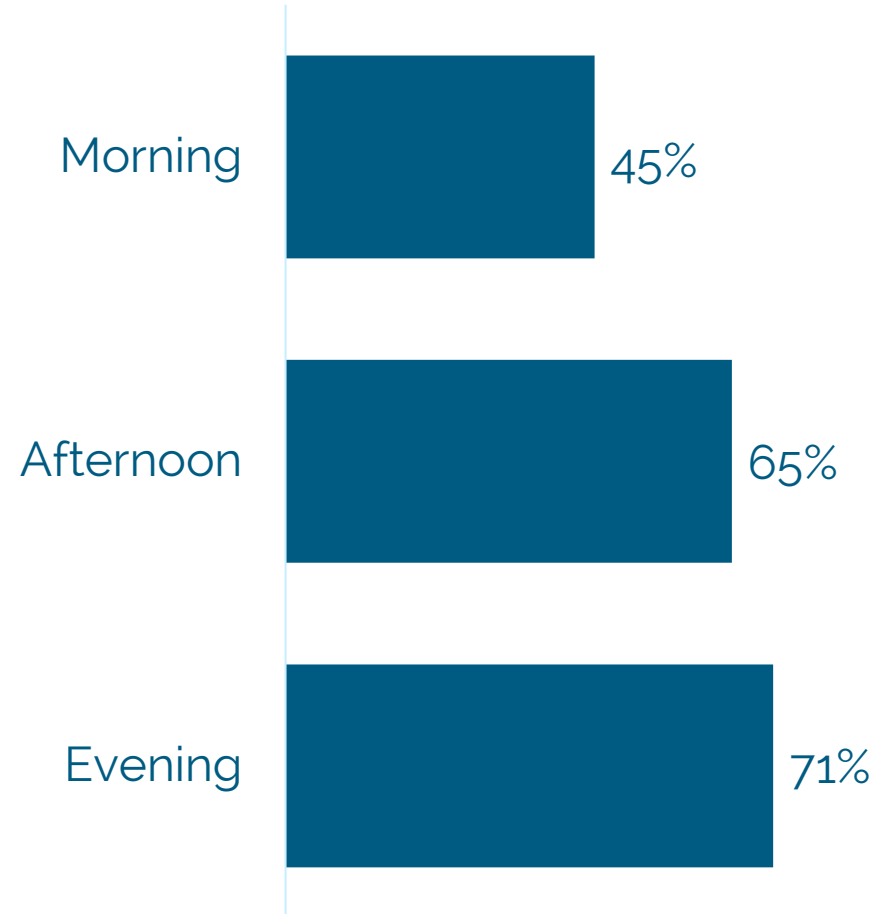
» Top activities enjoyed by visitors this quarter included:

- » **Eating at restaurants**
- » **Visiting the beach**
- » **Exploring Historic Downtown Fernandina Beach**
- » **Shopping**



VISITING HISTORIC DOWNTOWN*

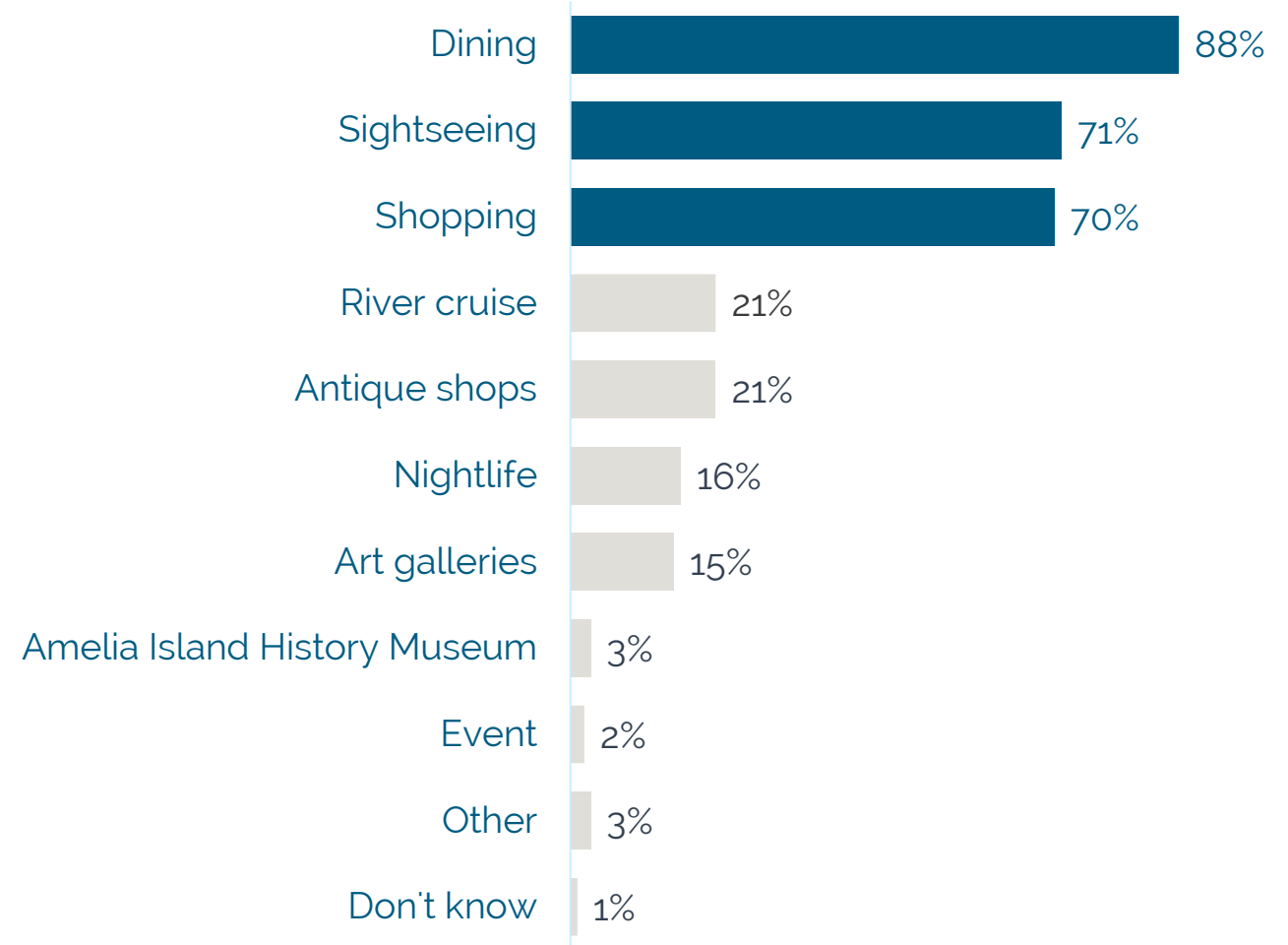
- » Those who visited **Historic Downtown Fernandina Beach** did so an average of **2.2 times** during their stay
- » Over **7 in 10** visited during the **evening**



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

REASON FOR VISITING HISTORIC DOWNTOWN*

- » Nearly **9 in 10** visitors to Historic Downtown Fernandina Beach go there to **dine at restaurants**
- » Around **7 in 10** go to the area to **sightsee** or to **shop**



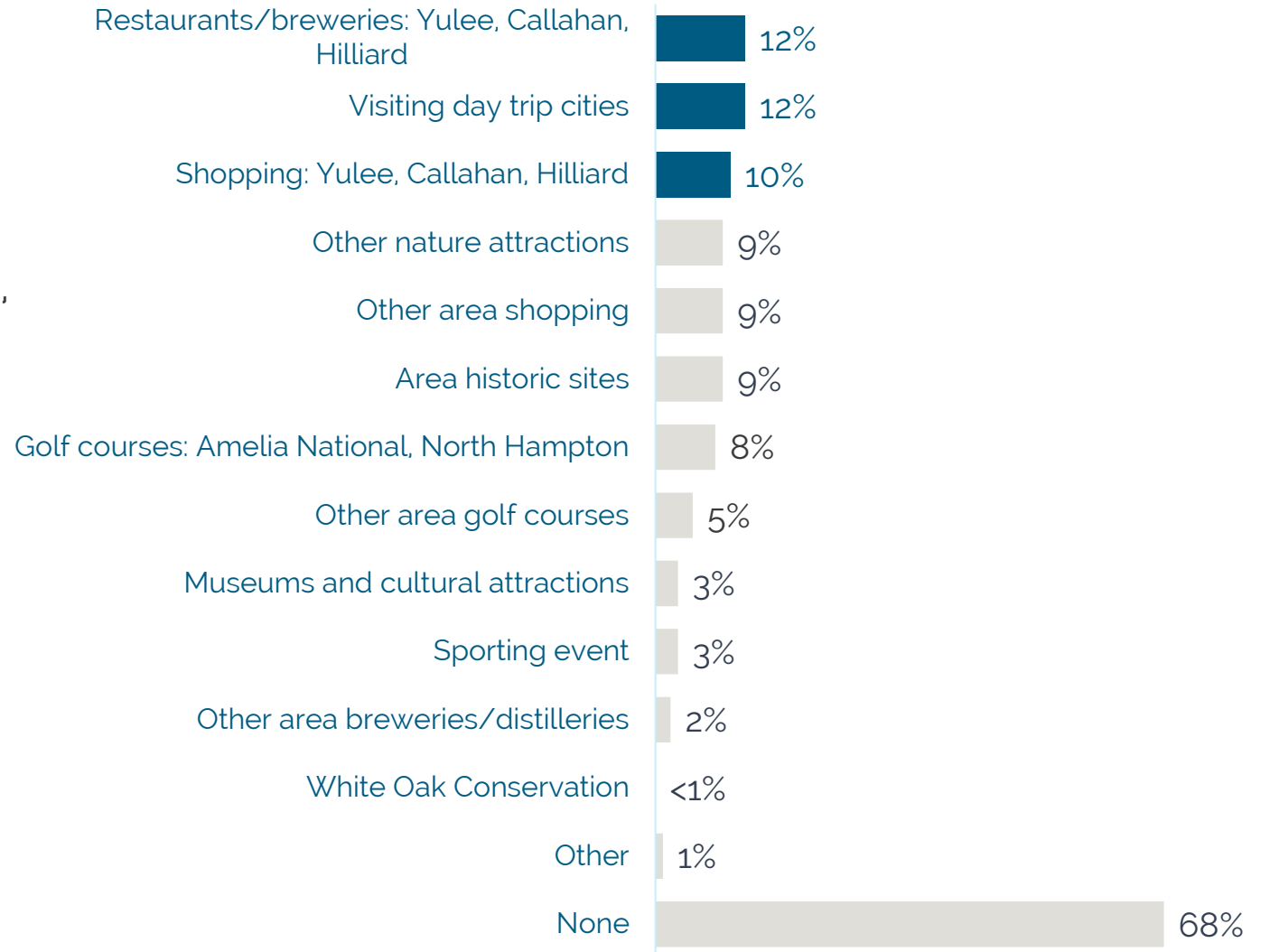
AREAS FOR IMPROVEMENT: DOWNTOWN*



- » More public parking, particularly at night
- » More directional signs
- » More activities for children
- » More public restrooms
- » More benches and picnic tables, particularly along the waterfront
- » More water fill stations
- » However, visitors love the architecture, the flowers, the benches honoring loved ones, and the dog friendliness.

OFF-ISLAND ACTIVITIES*

- » **1 in 8** visitors to Amelia Island also visit **restaurants** and **breweries** in Yulee, Callahan, or Hilliard
- » Another **1 in 8** visit day trip cities in the area
- » Nearly **7 in 10** Amelia Island visitors do not engage in any activities off-island



*Multiple responses permitted.

TRAVEL PARTY SPENDING

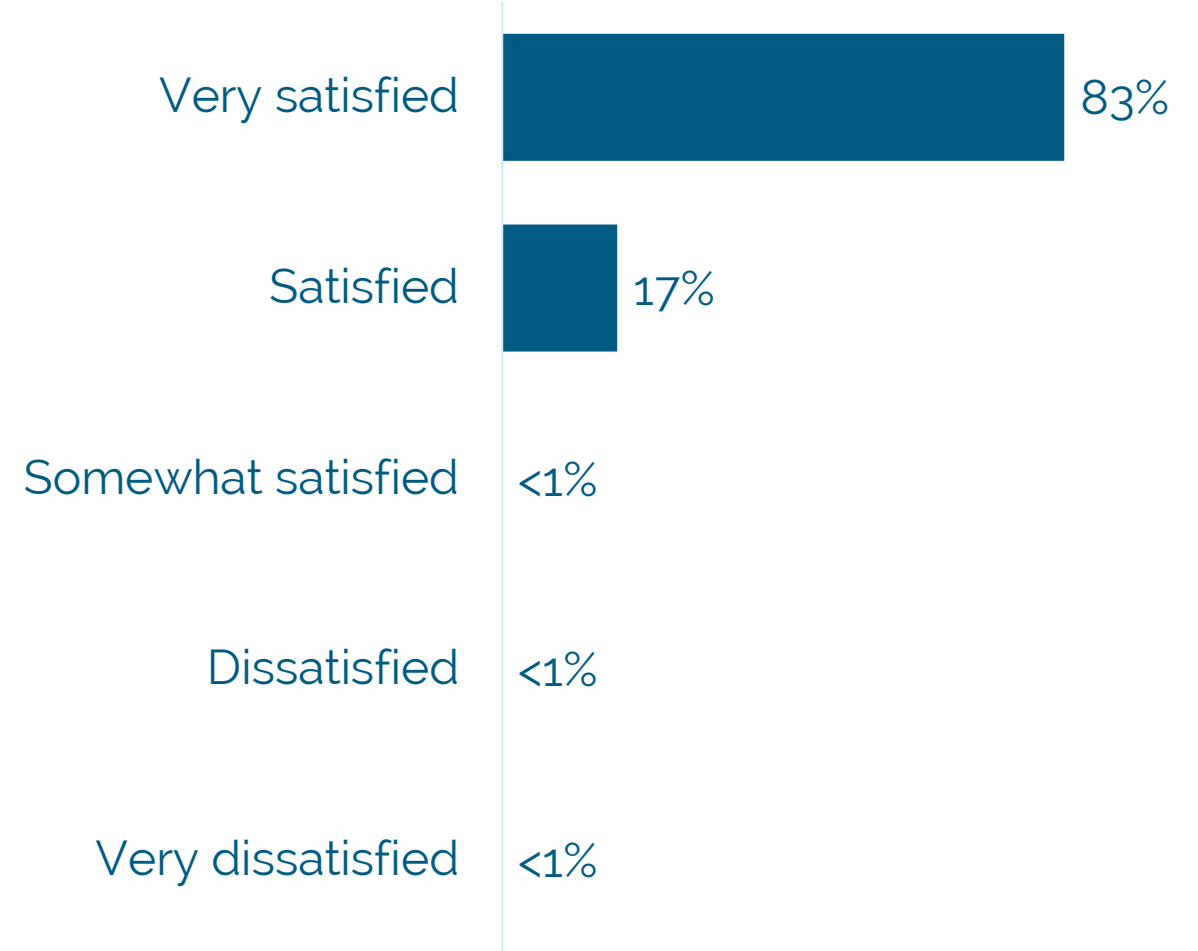
	Daily Spending	Total Spending
Accommodations	\$207	\$787
Restaurants	\$153	\$581
Groceries	\$34	\$129
Shopping	\$91	\$346
Activities & attractions	\$53	\$201
Transportation	\$38	\$144
Other	\$16	\$61
Total	\$592	\$2,250

VISITOR JOURNEY: POST-TRIP



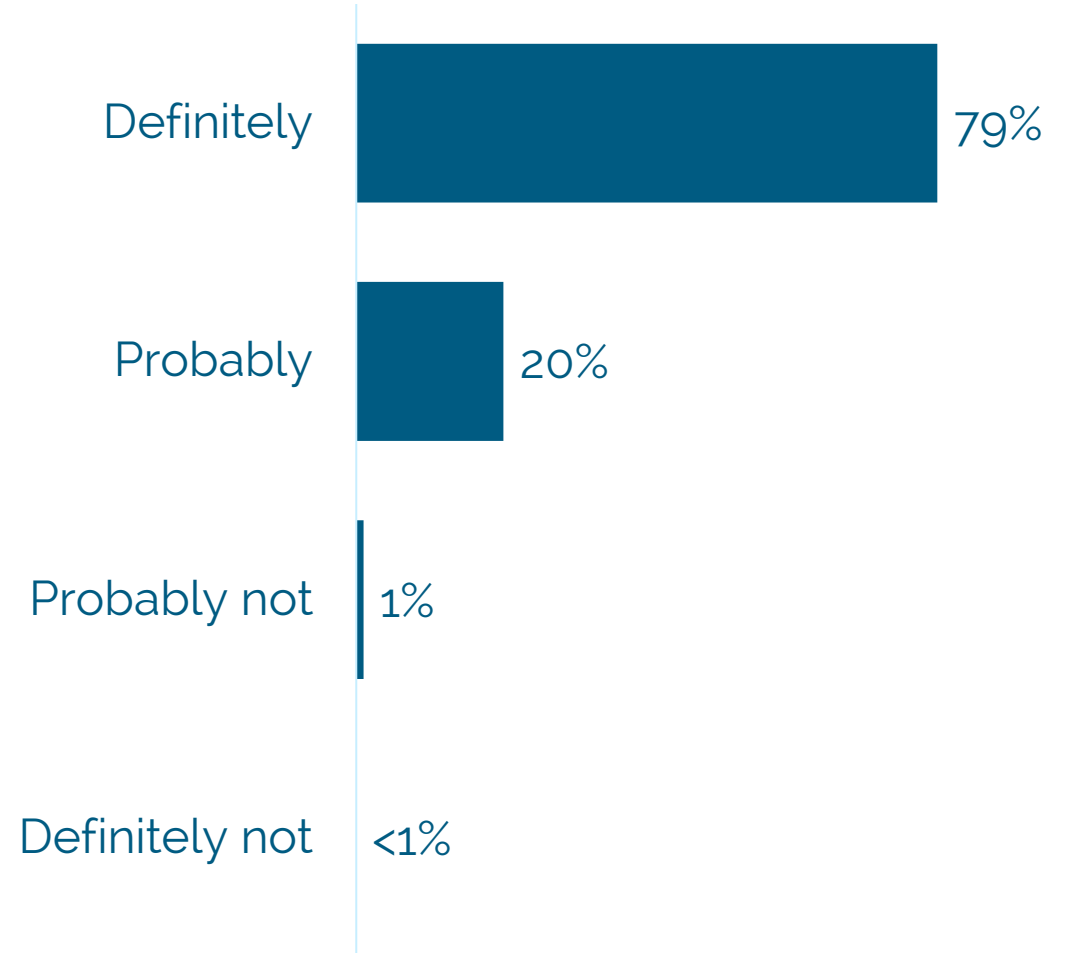
VISITOR SATISFACTION

- » Nearly **all** visitors were **satisfied** with their trip to Amelia Island
- » **5 in 6** visitors were **very satisfied** with their trip to Amelia Island



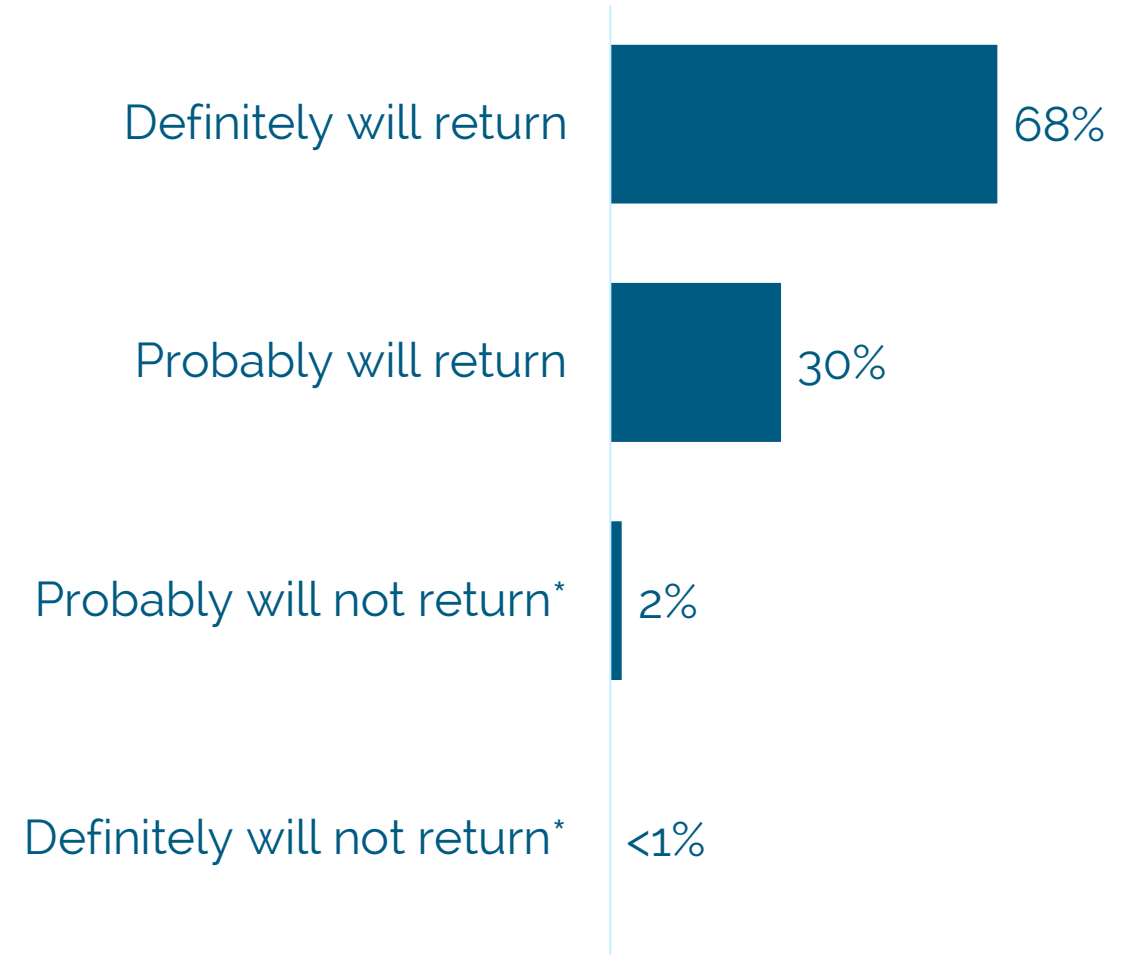
RECOMMENDATION

- » Nearly **all** visitors would recommend the Amelia Island area to others
- » Nearly **4 in 5** would definitely recommend the area



LIKELIHOOD OF RETURNING

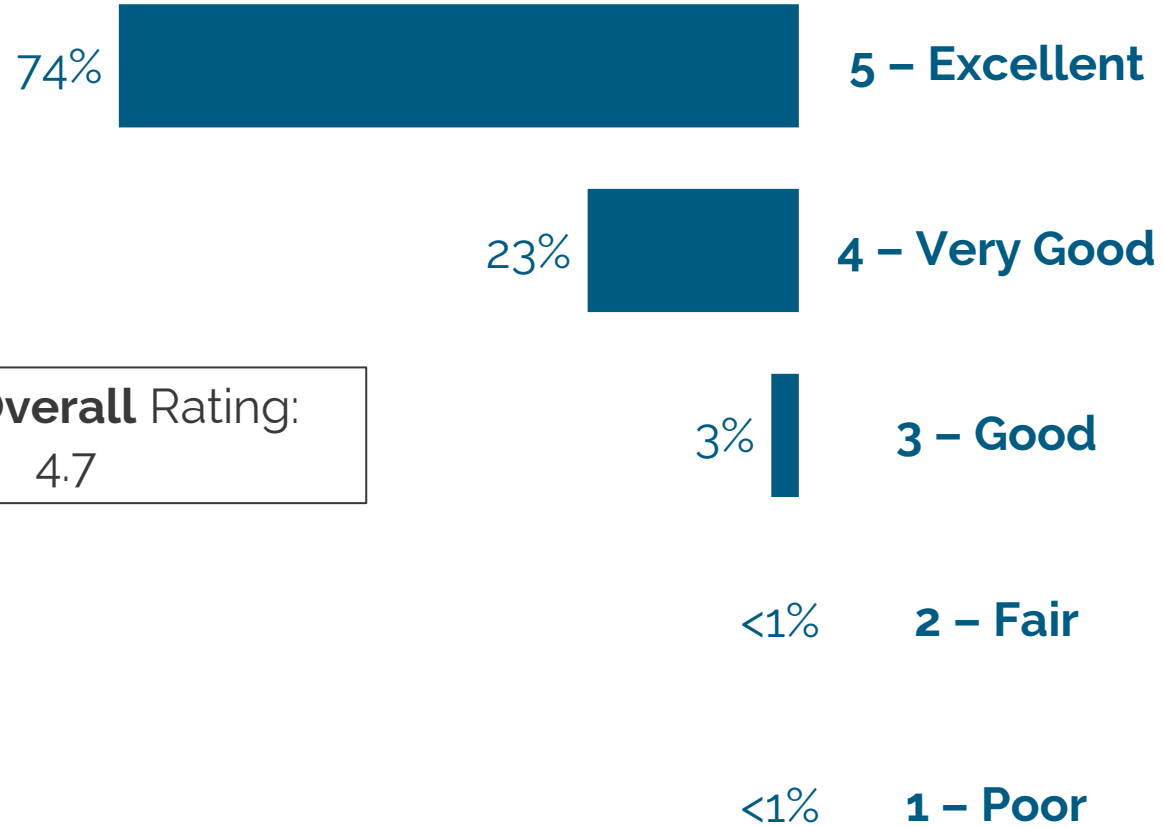
- » **98%** of visitors **will return** to the Amelia Island area
- » Nearly **7 in 10** visitors will **definitely return** to the Amelia Island area
- » The most frequently stated reasons for not returning were a preference for **variety** in vacation spots and difficulties with **parking**



*Those who said they will not return were asked why they were uncertain.

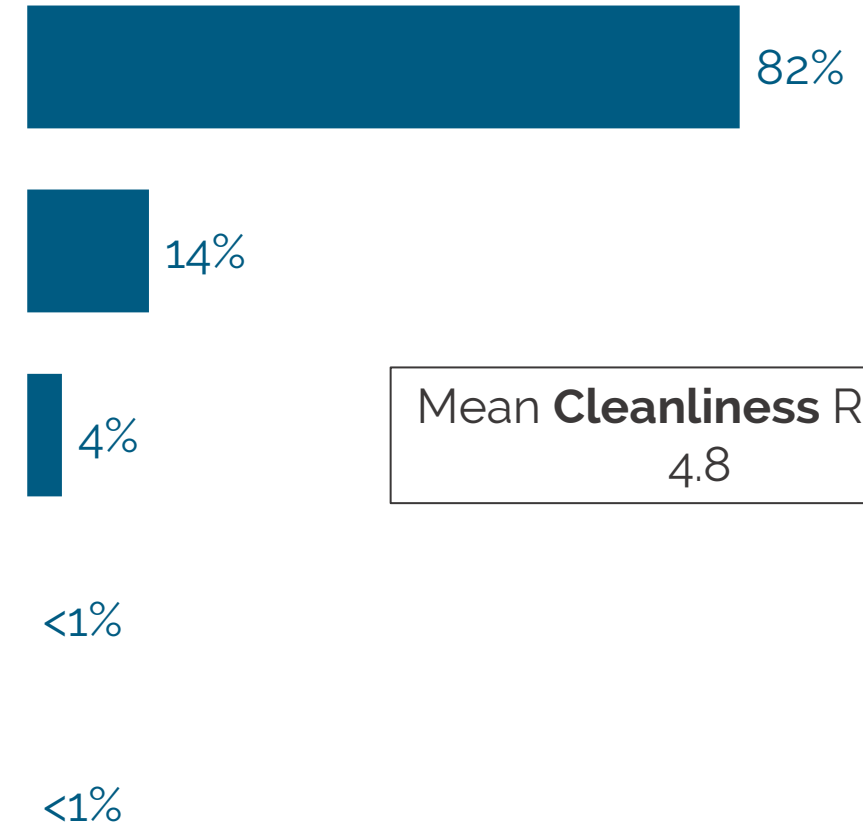
BEACH RATINGS

Overall Beach Rating



Mean **Overall** Rating:
4.7

Beach Cleanliness Rating



Mean **Cleanliness** Rating:
4.8

AREA DESCRIPTIONS*



- » "With the beautiful ocean views and great dining, this place is a sanctuary. An oasis for all ages!"
- » "Amelia Island is perfect for both business and leisure travel – there's plenty for the family to do while you're in meetings."
- » "There are so many opportunities to be active: water sports, walking and biking paths, golfing, and of course, swimming!"
- » "Chill and charming with a classic old Florida feel. We always feel very safe here."
- » "Everyone is so friendly! You won't find better customer service."
- » "Shopping, spas, and bars: the perfect girls' trip."
- » "There is a gorgeous restored downtown with centuries-old buildings. The architecture! The dining! The flowers!"
- » "The atmosphere is tranquil and the scenery is picturesque. We didn't want to leave."

*Open-ended responses. Multiple responses permitted.



Visitor Tracking Study

- » Interviews were completed with [504 visitors](#) in person at events, the beach, The Shops at The Omni, downtown, and online, between [July 1, 2024](#), and [September 30, 2024](#).

Amelia Island CVB

Visitor Tracking Study July – September 2024

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