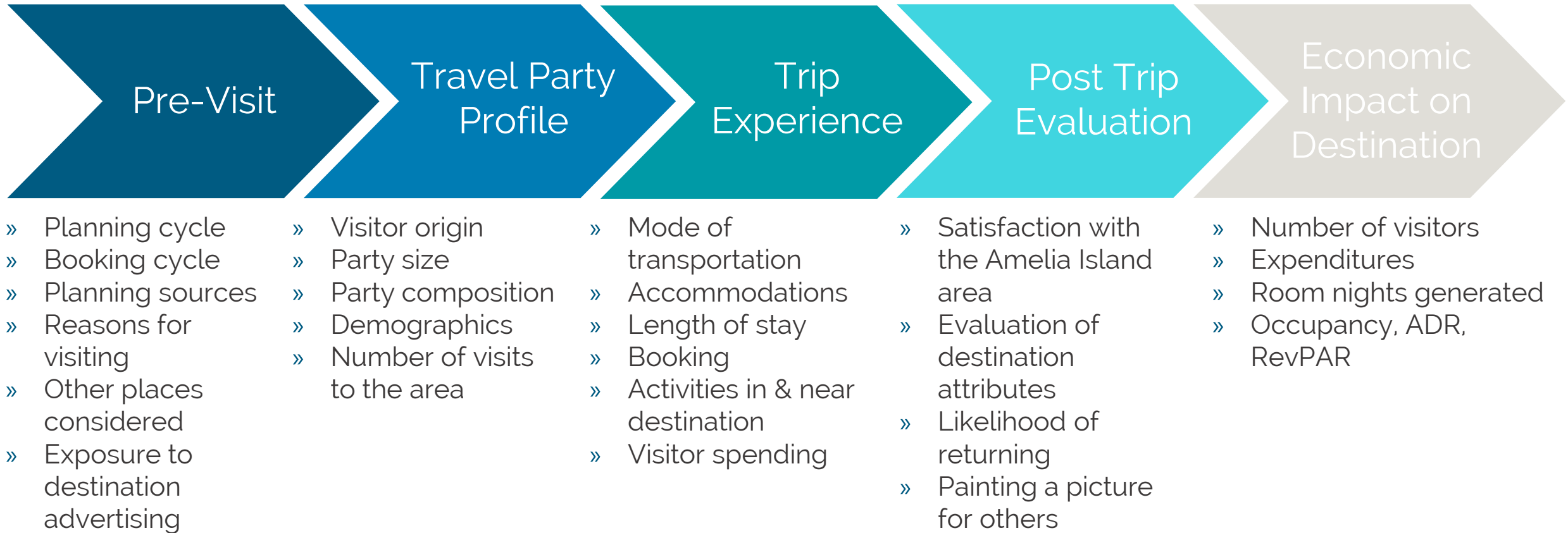


Amelia Island CVB

Visitor Tracking Study
April – June 2024

STUDY OBJECTIVES: VISITOR JOURNEY



EXECUTIVE SUMMARY



QUARTERLY SNAPSHOT

April – June
2024

- » This report includes data for all visitors, whereas the FY2023 Q3 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 than Q2, but longer YOY
- » Southeast visitation is up 13% points from Q2
- » Fewer overnight visitors are staying in paid accommodations compared to Q2; day tripper percent is similar to Q2
- » Total visitor number is up YOY, while length of stay is down



358,100

TOTAL
VISITORS

vs. 2023

↑ 3.6%



233,040

ROOM
NIGHTS

↑ 3.3%



\$224,969,100

DIRECT
SPENDING

↓ 1.4%



1,217,540

VISITOR
DAYS

↓ 2.2%

VISITOR JOURNEY: ECONOMIC IMPACT



TOURISM SNAPSHOT: METRICS

	April – June 2023 ^{1,2}	April – June 2024	% Δ
Visitors	345,680	358,100	+3.6%
Visitor Days	1,244,450	1,217,540	-2.2%
Direct Spending	\$228,058,400	\$224,969,100	-1.4%
Economic Impact ³	\$300,124,900	\$296,059,300	-1.4%

	April – June 2023 ²	April – June 2024	% Δ
Occupancy ⁴	66.8%	66.6%	-0.3%
ADR ⁴	\$340.31	\$331.45	-2.6%
RevPAR ⁴	\$227.34	\$220.81	-2.9%
Room Nights ^{4,5}	225,680	233,040	+3.3%

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 Q3 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.

⁵Room night increase despite a slight decrease in occupancy due to more rental units available in 2024.

VISITOR JOURNEY: PRE-VISIT



TRIP PLANNING/BOOKING CYCLE*

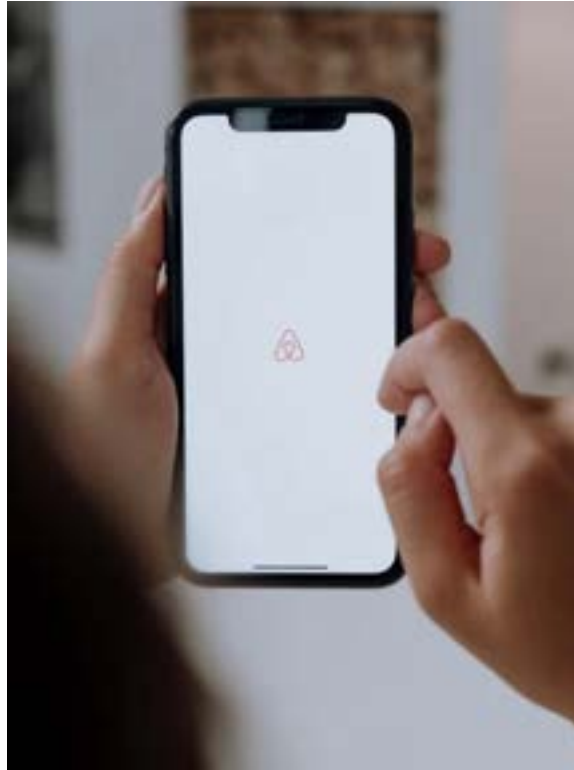
- » On average, leisure visitors began planning **38 days** before their trip
- » On average, leisure visitors booked their trip **31 days** before their arrival



TOP TRIP PLANNING SOURCES*



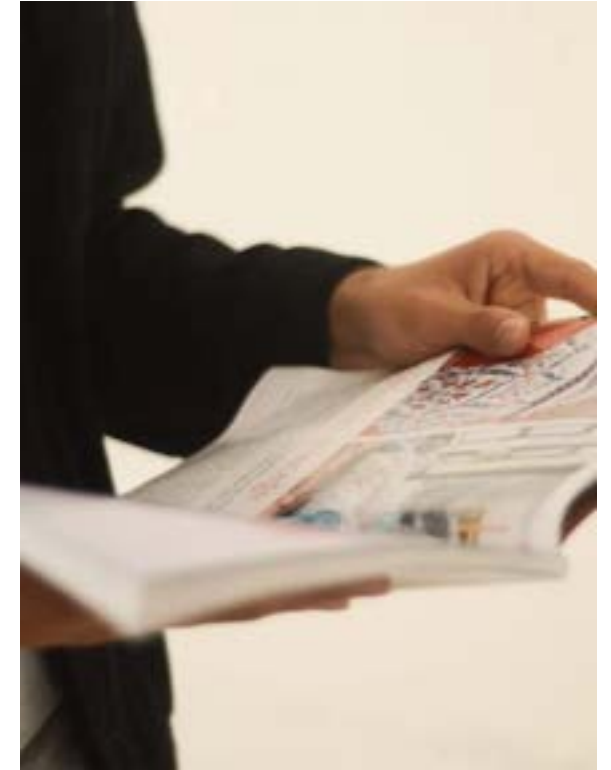
28% Friends/family



25% Airbnb, Vrbo, etc.



23% Hotel
websites/apps



21% Magazine

TOP REASONS FOR VISITING*



66% Vacation/leisure



24% Special occasion or event



16% Visit friends/relatives

OTHER DESTINATIONS CONSIDERED*

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

Top other destinations considered:



10% St. Augustine/Ponte Vedra



7% Daytona Beach area



7% Florida Keys

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

ADVERTISING RECALL*

- » **36%** of leisure visitors recalled advertising about the Amelia Island area
- » This information influenced **16%** of **all** leisure visitors to visit the Amelia Island area

*Based on visitors traveling for leisure.



TOP SOURCES OF ADVERTISING RECALL*

Base: All Visitors



13% Online article



13% Amelia Island's social media



10% Magazine article



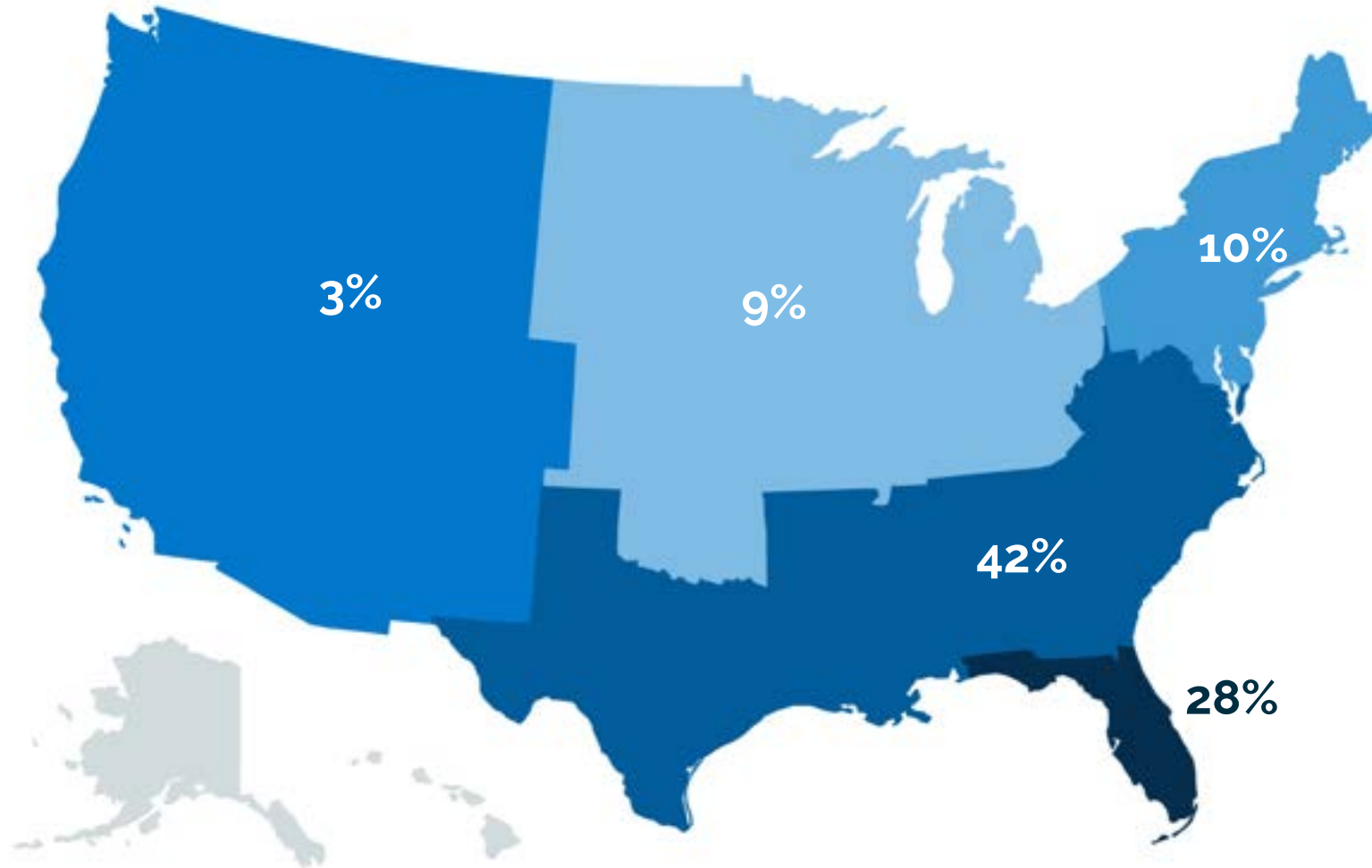
9% Ad on a website

VISITOR JOURNEY: TRAVEL PARTY PROFILE



REGIONS OF ORIGIN

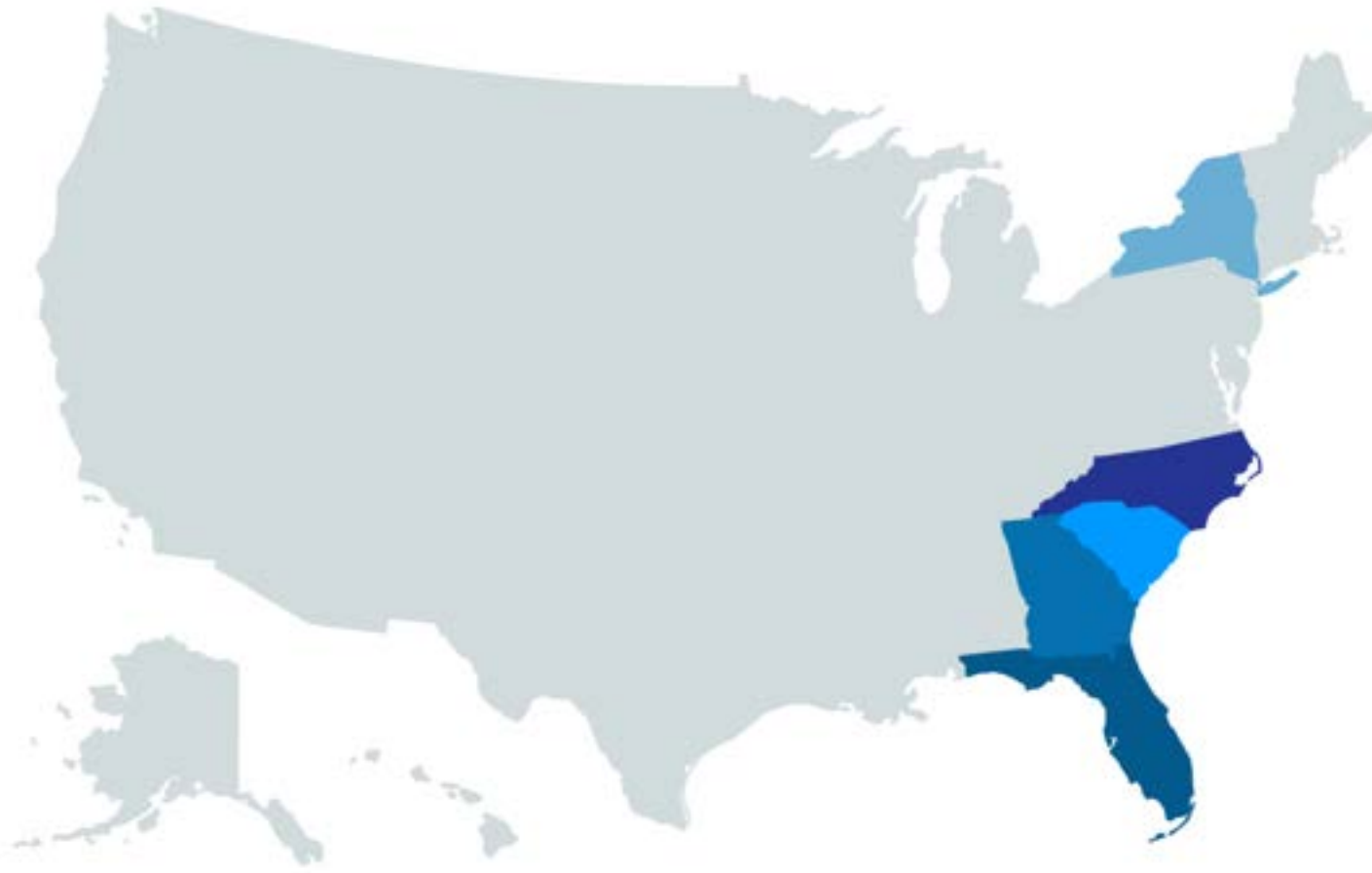
The Southeast, including Florida, accounts for **7 in 10** visitors.



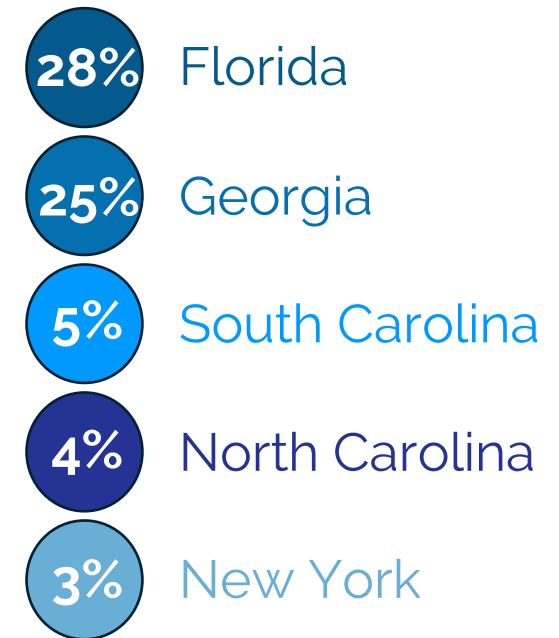
8% of visitors traveled to Amelia Island from outside of the U.S.*

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

TOP STATES OF ORIGIN



Nearly 2 in 3 visitors reside in **5** states:



TOP MARKETS OF ORIGIN



22% Jacksonville¹



10% Atlanta²



7% Orlando



4% New York²

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 **3.0** people



Over **2 in 5** visitors traveled as a couple



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

VISITOR PROFILE

- » The typical Amelia Island area visitor:
 - » Is **51** years old
 - » Has an annual household income of **\$149,000**
 - » Is White/Caucasian (**87%**)



NEW & RETURNING VISITORS

- » Over **1 in 3** were first-time visitors to the Amelia Island area
- » **15%** of visitors were loyalists, having visited over 10 times

VISITOR JOURNEY: TRIP EXPERIENCE



TRANSPORTATION

- » **73%** of visitors drove to the Amelia Island area
- » **89%** of visitors who flew to Amelia Island used the **Jacksonville International Airport** (**23%** of all visitors)



LENGTH OF STAY

- » Typical visitors stayed **3.4 nights** in the Amelia Island area
- » Visitors staying in paid accommodations stayed an average of **3.7 nights** in the area



TRAVEL/LODGING CHOICES



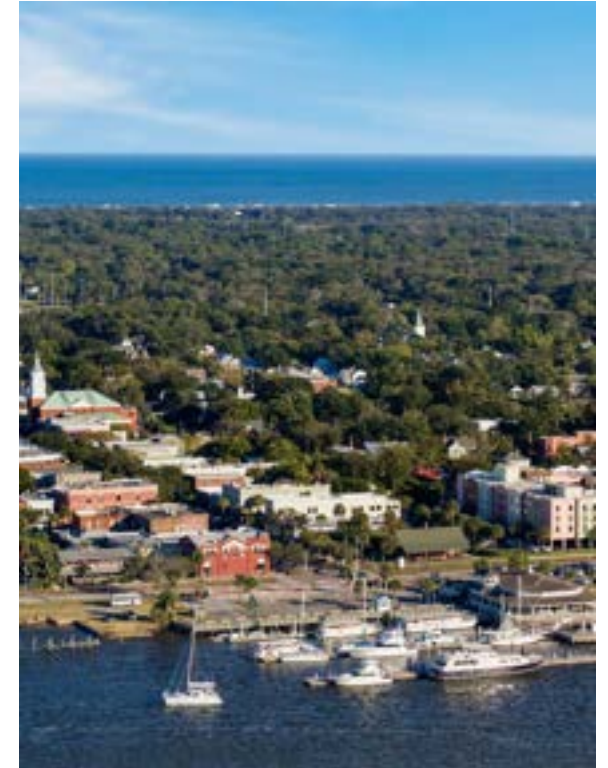
36% Hotel/Motel/
Resort



23% Day Tripper



18% With
Friends/Relatives



15% Condo/Rental
House*

TOP ACTIVITIES DURING VISIT*



79% Beach



78% Restaurants



75% Historic Downtown
Fernandina Beach



58% Shopping

VISITING HISTORIC DOWNTOWN

- » Those who visited Historic Downtown Fernandina Beach did so an average of **2.5 times** during their stay
- » Afternoon and evening were the most common times to visit
- » 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 **restaurants/breweries**, with nearly **1 in 6** 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 **\$525** per day and **\$1,785** during their trip
- » The typical visitor spent **\$188** per day and **\$639** during their trip

VISITOR JOURNEY: POST-TRIP



VISITOR SATISFACTION

- » **99%** of visitors were **satisfied** with their trip to Amelia Island (88% were very satisfied)
- » Nearly **all** visitors would **recommend** the area to others (78% would definitely recommend the area)
- » **98%** of visitors will **return** to the Amelia Island area (72% will definitely return)



BEACH RATINGS

- » **99%** of visitors rated Amelia Island's beaches as **excellent or very good overall** (88% rated them as excellent)
- » Nearly **all** visitors rated the **cleanliness** of Amelia Island's beaches as **excellent or very good** (95% rated it as excellent)



WHY VISITORS CHOSE AMELIA ISLAND*



"It's much more relaxing than other, more crowded beaches. A nice, quiet little island – truly 'Old Florida'."



"The island has a lot of history, including old architecture. The beaches are glorious, but there's more to do here than just that!"



"Amelia Island is quaint, charming, and tranquil, with good beaches and good people."



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

DETAILED FINDINGS



QUARTERLY METRICS

	April – June 2023 ^{1,2}	April – June 2024	% Δ
Visitors	345,680	358,100	+3.6%
Visitor Days	1,244,450	1,217,540	-2.2%
Direct Spending	\$228,058,400	\$224,969,100	-1.4%
Economic Impact ³	\$300,124,900	\$296,059,300	-1.4%

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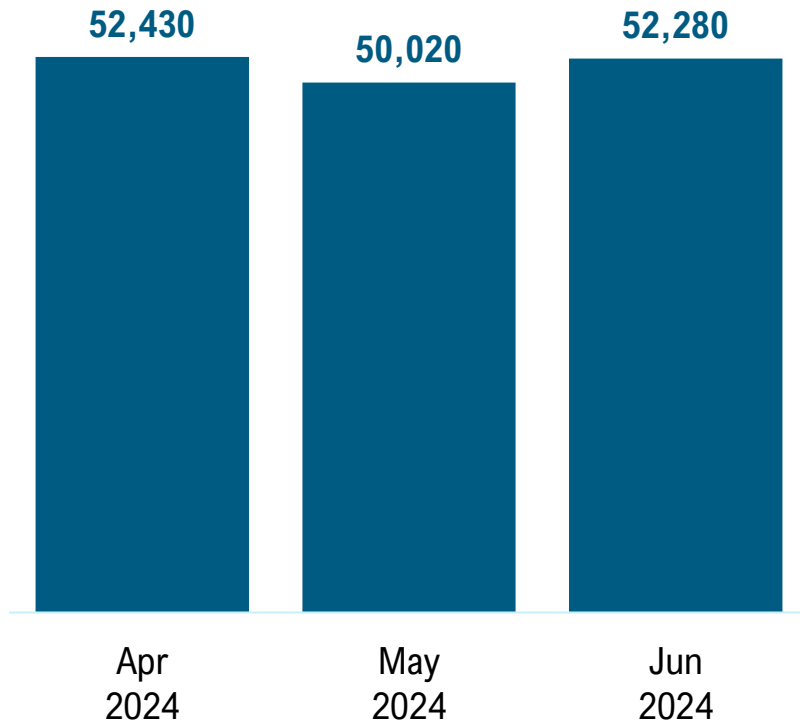
³An IMPLAN multiplier of 1.32 was used for both FY2023 and FY2024.

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

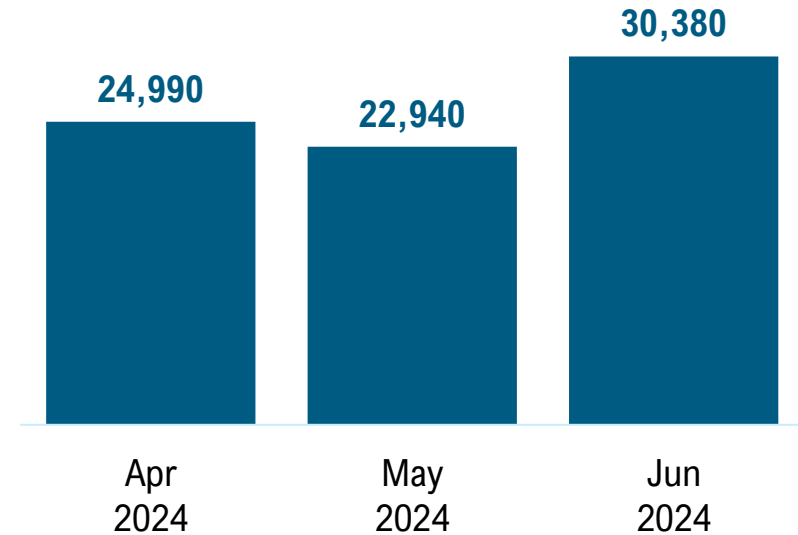
⁵Room night increase despite a slight decrease in occupancy due to more rental units available in 2024.

MONTHLY ROOM NIGHTS

Hotel Room Nights



Vacation Rental Room Nights



MONTHLY VISITOR COUNTS

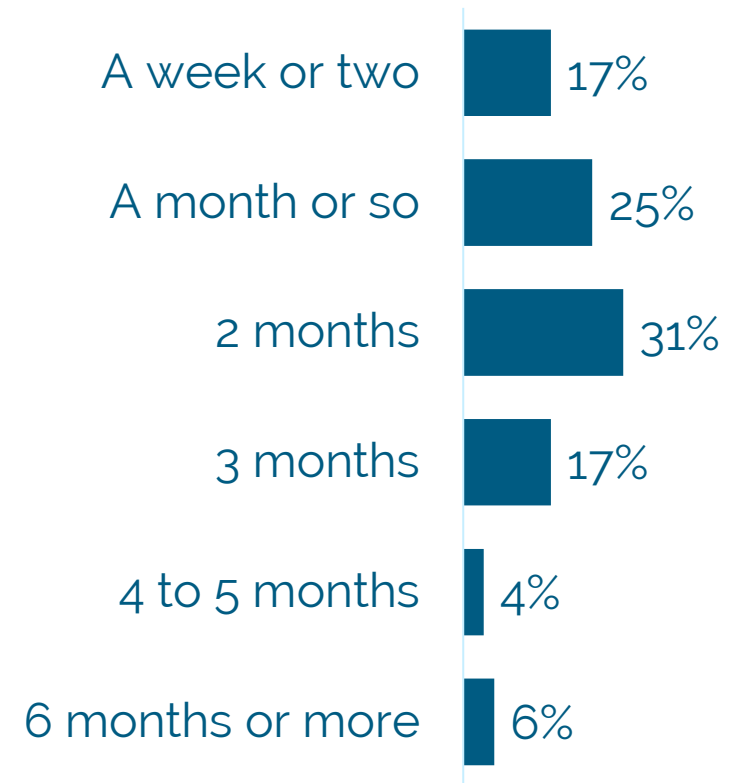
Accommodation Type	April Visitors	May Visitors	June Visitors
Hotel/motel/resort	44,510	41,100	44,390
Day tripper	28,180	26,020	28,100
Non-paid accommodations*	27,360	25,260	27,280
Vacation rental	21,460	18,870	25,570
Total	121,510	111,250	125,340

VISITOR JOURNEY: PRE-VISIT



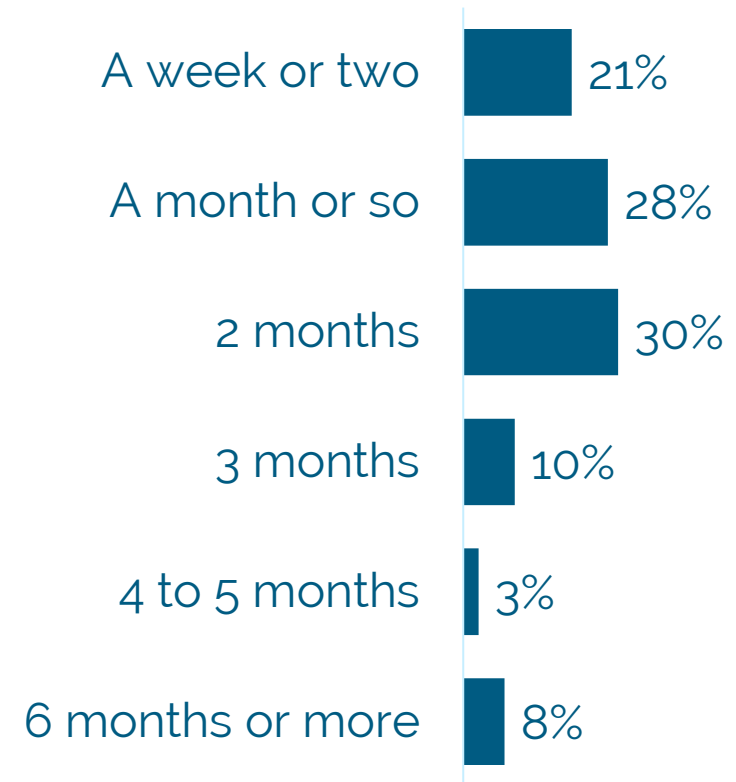
TRIP PLANNING CYCLE*

- » Leisure visitors to Amelia Island have short trip planning windows, as over **2 in 5** planned their trip to the area **1 month or less in advance**
- » On the other hand, over **1 in 4** leisure visitors planned their trip **3 or more months in advance**
- » On average, leisure visitors began planning **38 days** before their trip
- » Leisure visitors staying in paid accommodations began planning **44 days** before their trip



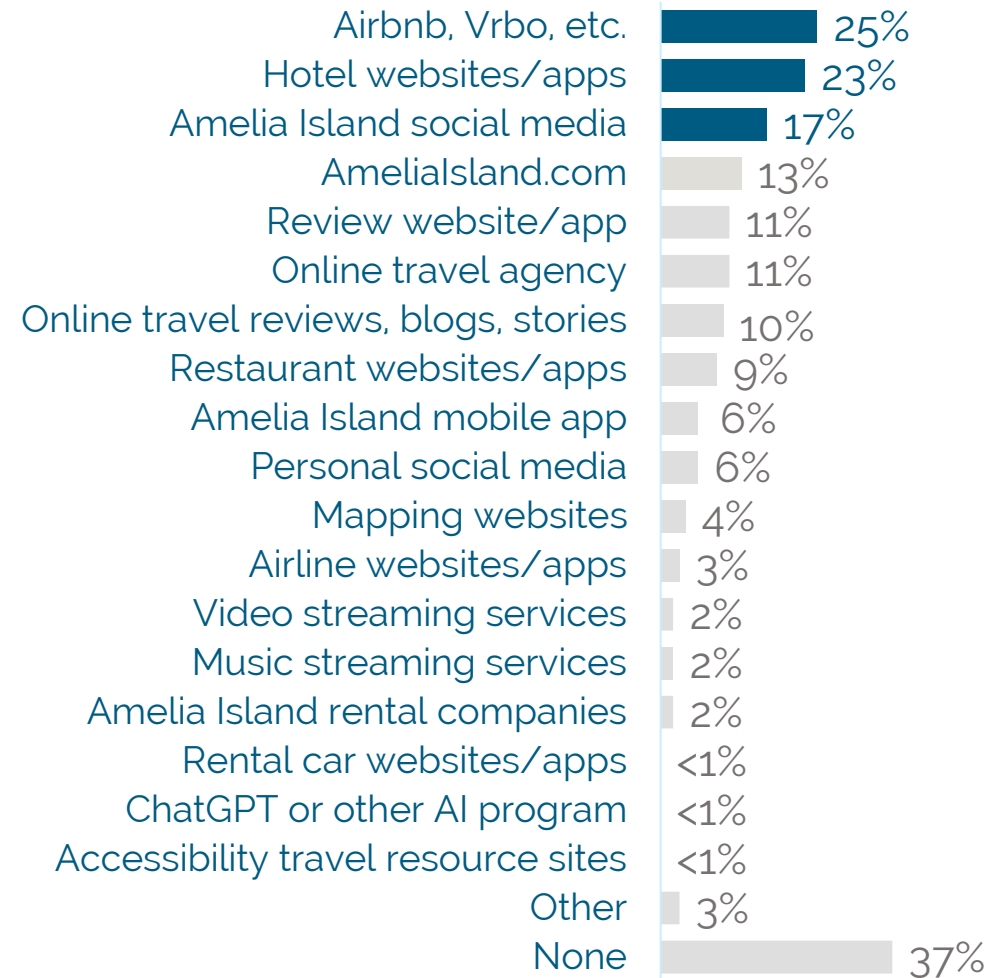
TRIP BOOKING CYCLE*

- » Nearly **half** of leisure visitors booked their trip to the Amelia Island area **a month or less in advance**
- » Over **1 in 5** booked their trip **3 or more months in advance**
- » On average, leisure visitors booked their trip **31 days** before their arrival
- » Leisure visitors staying in paid accommodations booked **39 days** before their arrival



ONLINE TRIP PLANNING SOURCES*

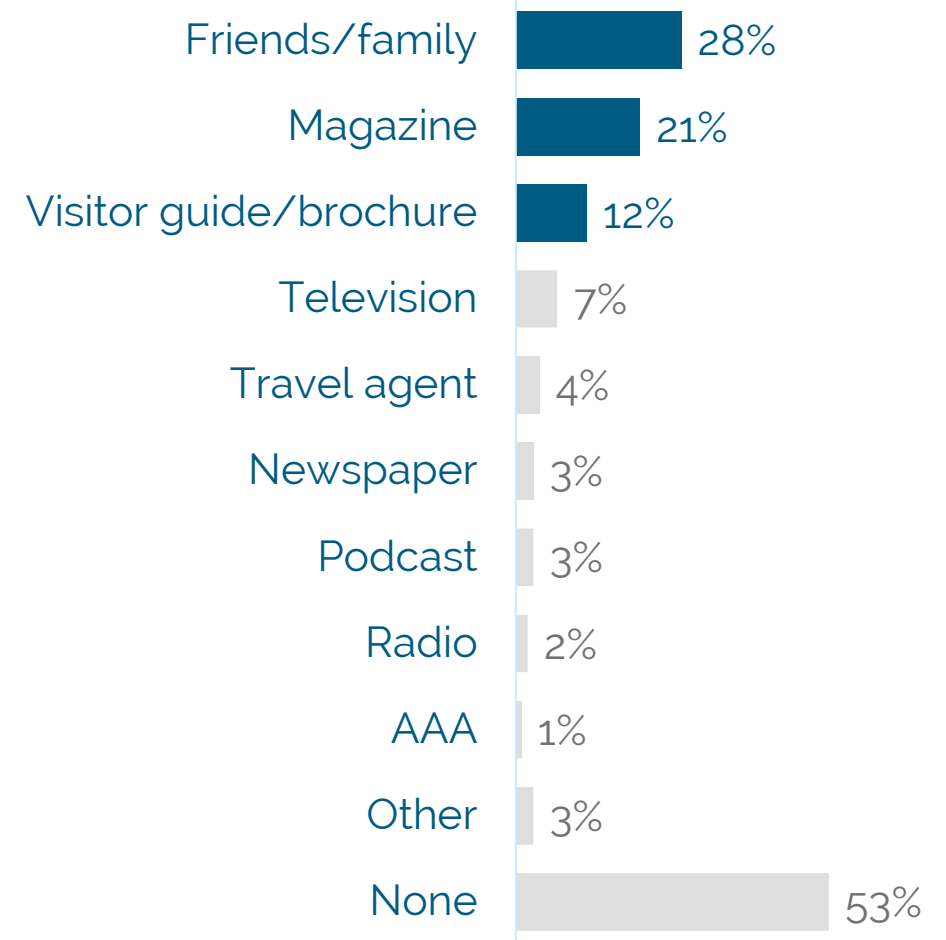
- » Vacation rental websites like **Airbnb or Vrbo** are the **number one online planning source** for leisure trips to Amelia Island, used by **1 in 4** leisure visitors
- » **Hotel websites/apps** are also a strong trip planning source, used by nearly **1 in 4** leisure visitors
- » **Amelia Island's social media** is another strong trip planning source, used by over **1 in 6** leisure visitors



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

OTHER TRIP PLANNING SOURCES*

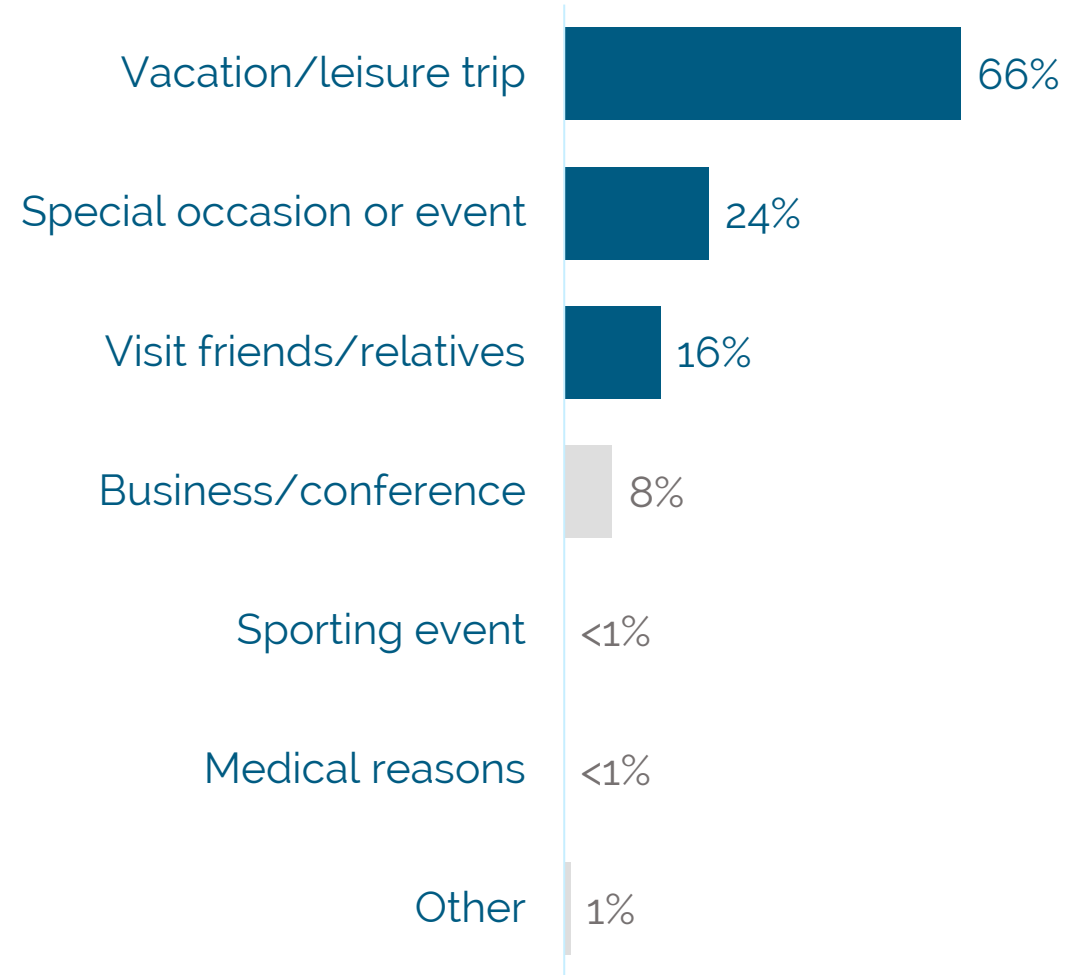
- » Nearly **3 in 10** leisure visitors planned their trip to the Amelia Island area by talking to **friends or family**
- » Traditional planning sources such as **magazines** (used by over **1 in 5** leisure visitors) and **visitor guides/brochures** (used by **1 in 8** leisure visitors) were also popular



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

REASONS FOR VISITING*

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



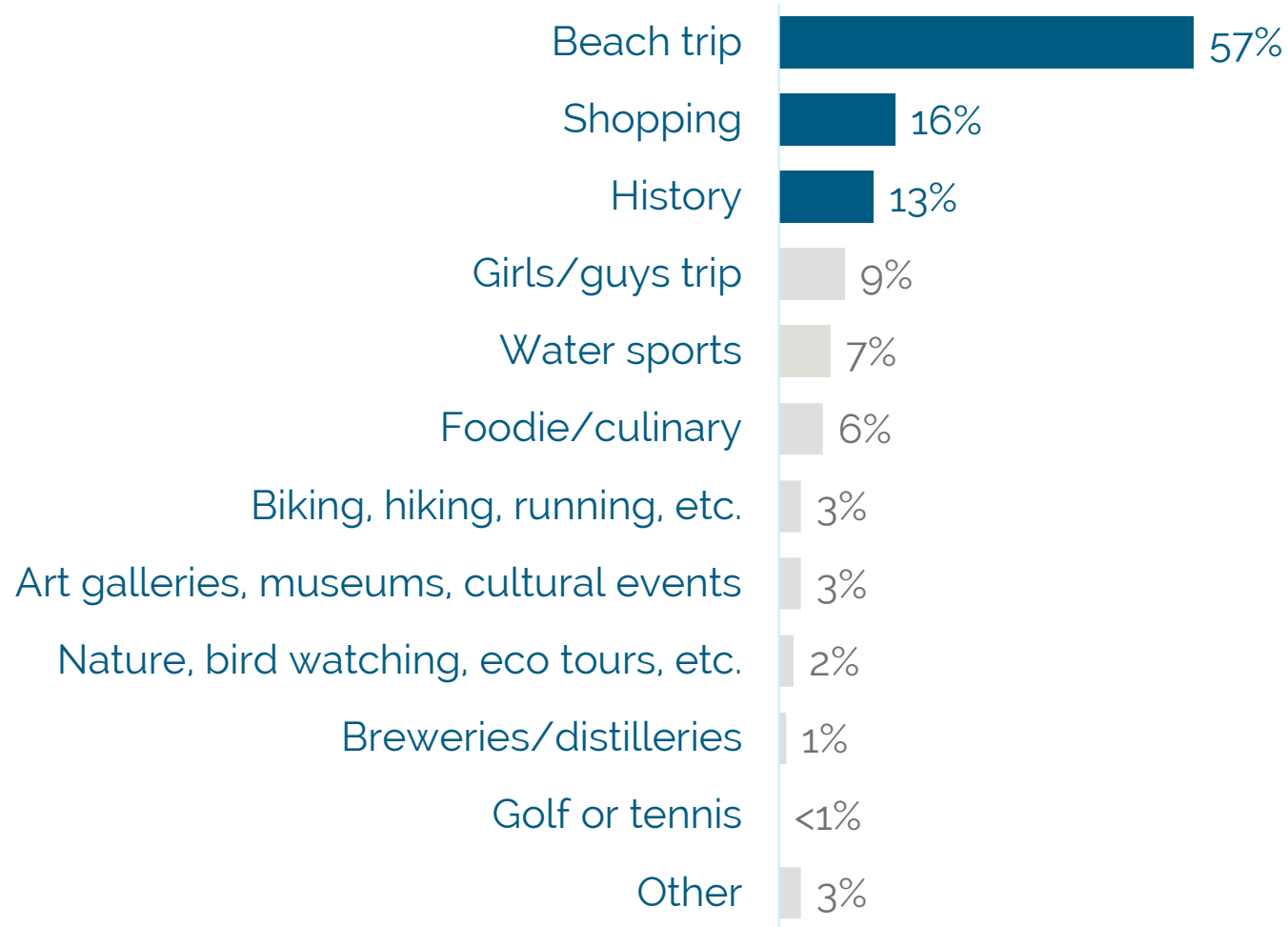
OPEN-ENDED REASONS FOR VISITING*



- » "Amelia Island has the perfect mix of things to do: the beach, restaurants, bars, and shops."
- » "The area has the best beaches. They're beautiful and have a laid-back feel."
- » "We came to Amelia Island because we had never been, and we'd heard good things!"
- » "It's a family-friendly place – plenty to do for us parents as well as for the kids."
- » "We choose Amelia Island for the quiet and the beautiful scenery. It's a very pretty area!"

*Open-ended responses. Multiple responses permitted.

TYPE OF VACATION/LEISURE TRIP*

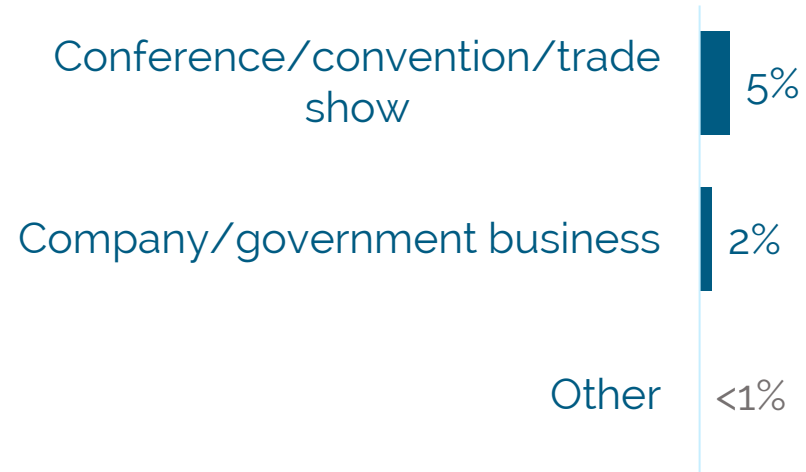


*Up to 3 responses permitted.
Based on all visitors traveling for leisure.

TYPE OF SPECIAL OCCASION OR EVENT*

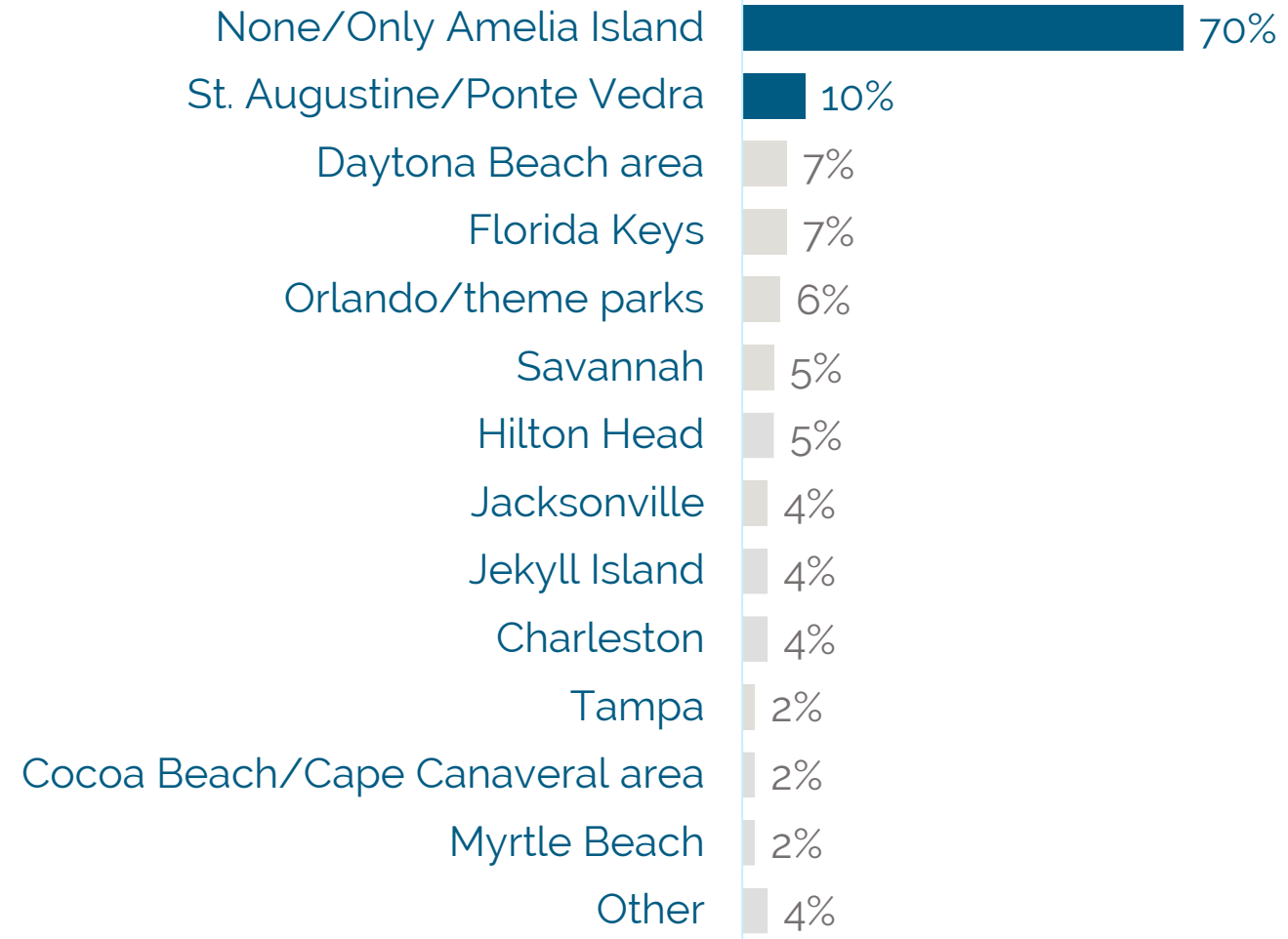


TYPE OF BUSINESS/CONFERENCE*



OTHER DESTINATIONS CONSIDERED*

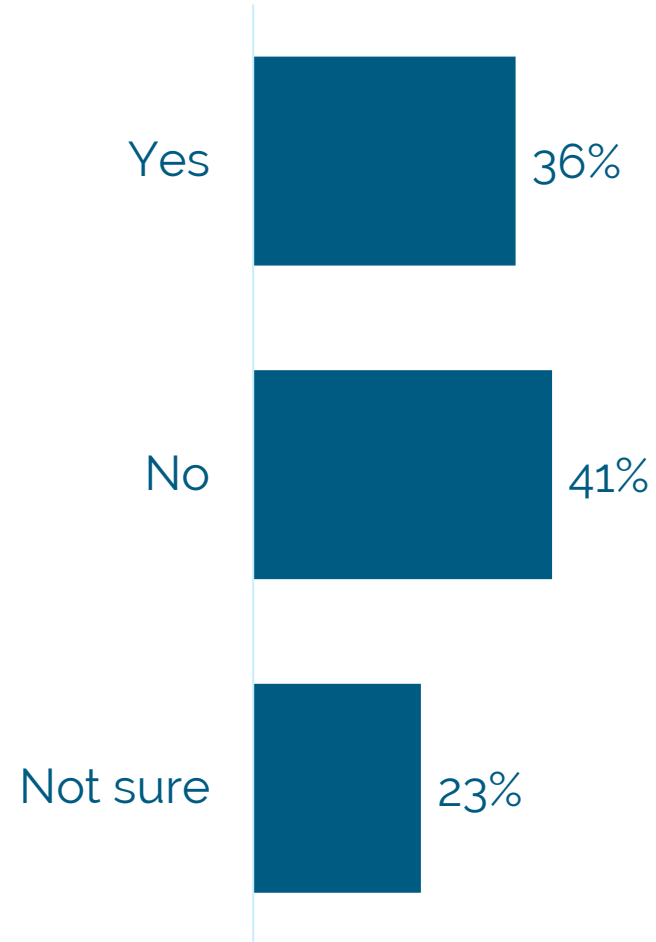
- » **7 in 10** leisure visitors to the Amelia Island area did not consider visiting any other destinations
- » **1 in 10** leisure visitors to the area also considered visiting **St. Augustine/Ponte Vedra**



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

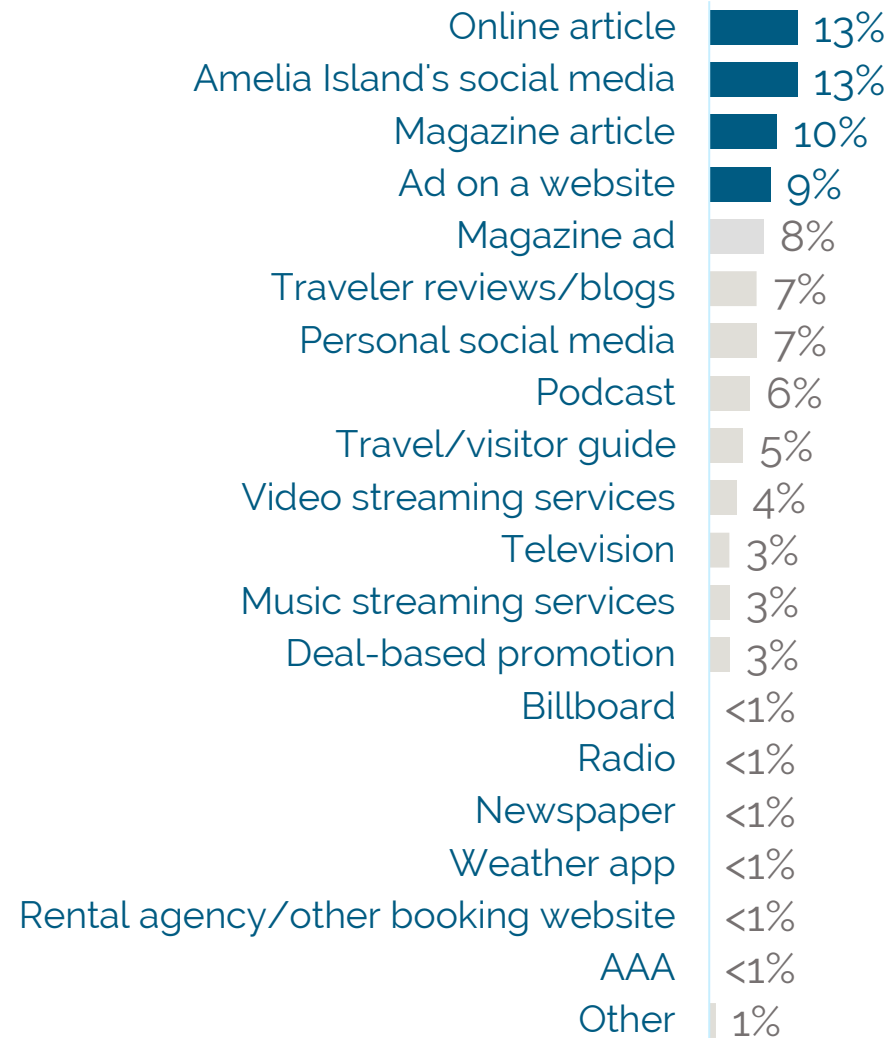
ADVERTISING RECALL*

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



ADVERTISING SOURCES*

- » Out of **all** leisure visitors, over **1 in 8** recalled seeing advertising in an **online article** or on **Amelia Island's social media**
- » Around **1 in 10** saw advertising in a **magazine article** or in an **ad on a website**
- » This information influenced **16%** of **all leisure visitors** to visit the Amelia Island area

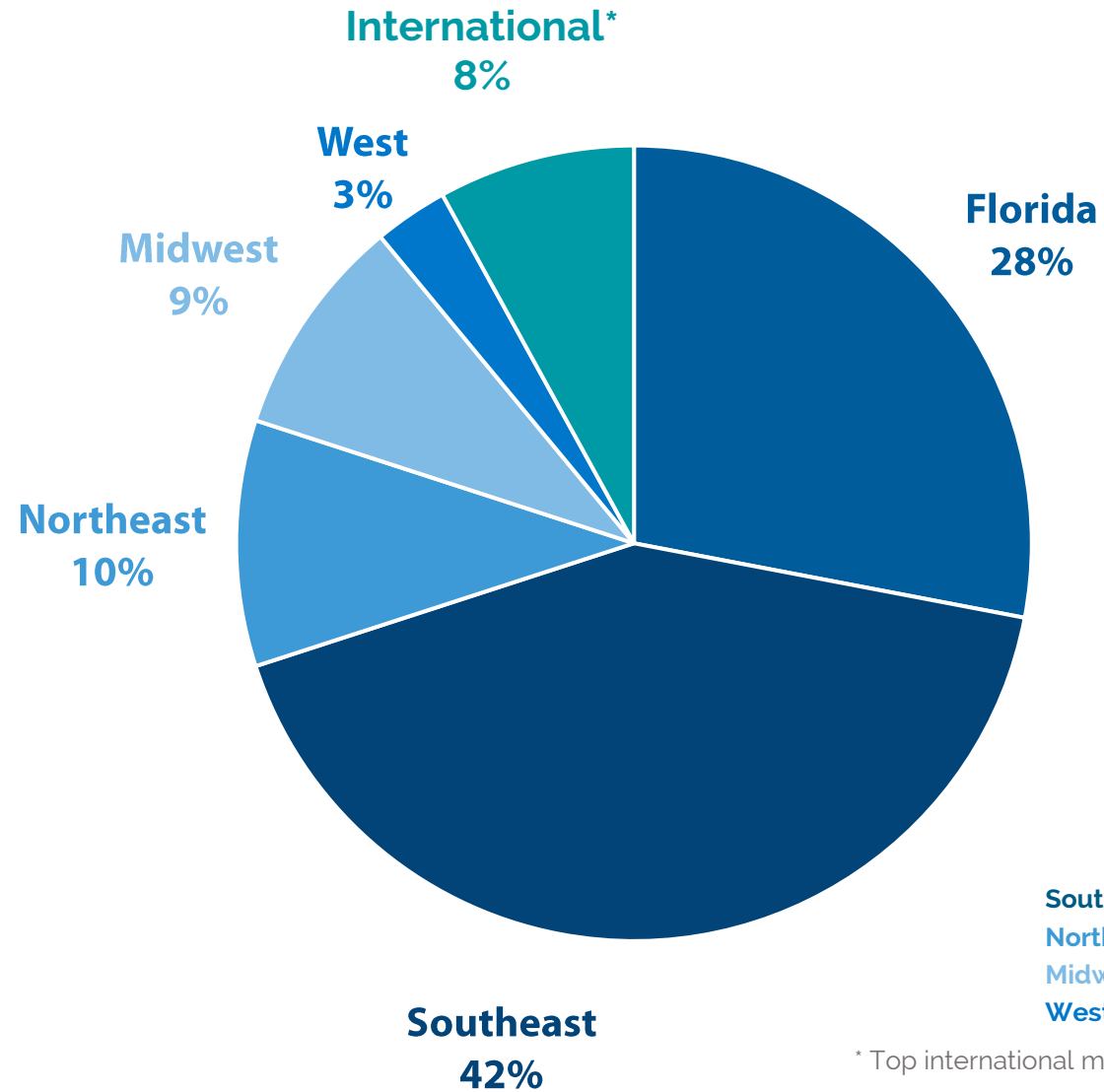


*Multiple responses permitted.
Based on all visitors traveling for leisure.

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

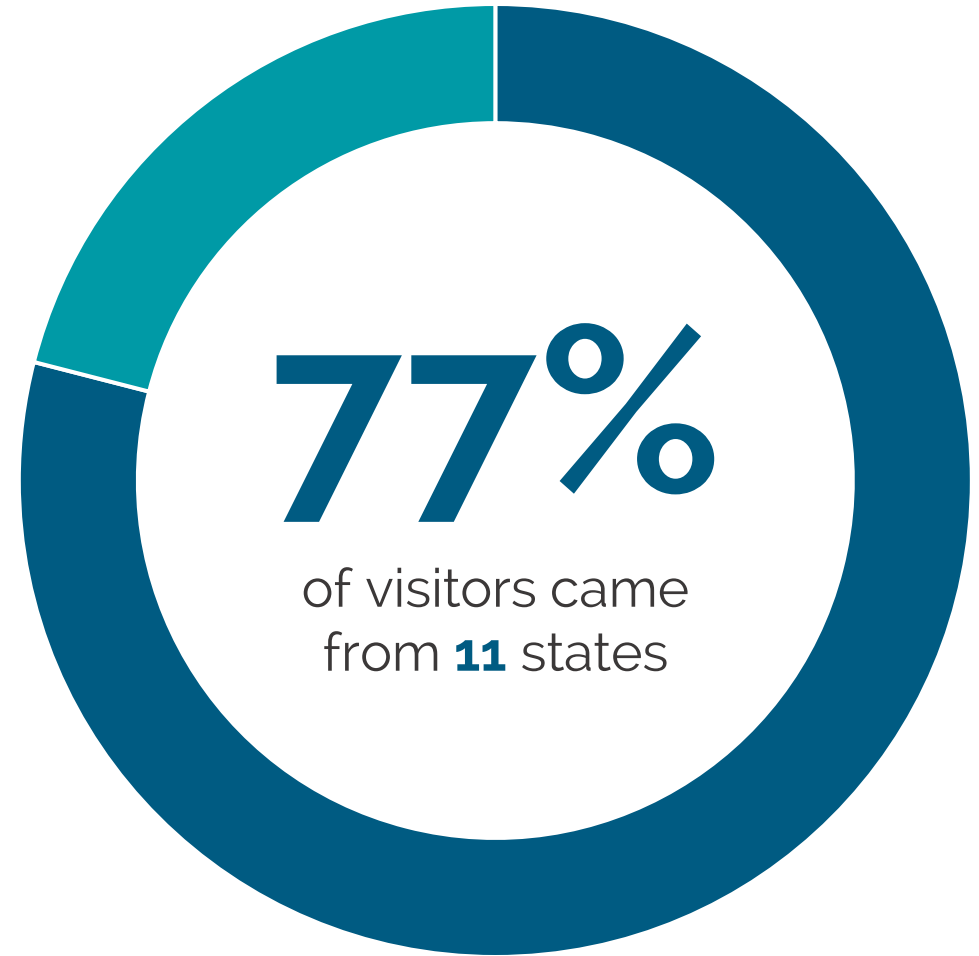
West: WA, OR, CA, NV, ID, MT, WY, CO, UT, AZ, NM, AK, HI

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

STATE OF ORIGIN

Top States of Origin 2024

Florida	28%
Georgia	25%
South Carolina	5%
North Carolina	4%
New York	3%
Illinois	2%
Minnesota	2%
Ohio	2%
Pennsylvania	2%
Tennessee	2%
Virginia	2%



TOP ORIGIN MARKETS

Top Origin Markets – All Visitors

Jacksonville**	22%
Atlanta*	10%
Orlando-Daytona Beach-Melbourne	7%
New York*	4%
Savannah	3%
Charlotte*	2%
Greenville, SC Area	2%
Macon	2%
Minneapolis-St. Paul*	2%
Tampa-St. Petersburg	2%

Top Origin Markets – Overnight Visitors

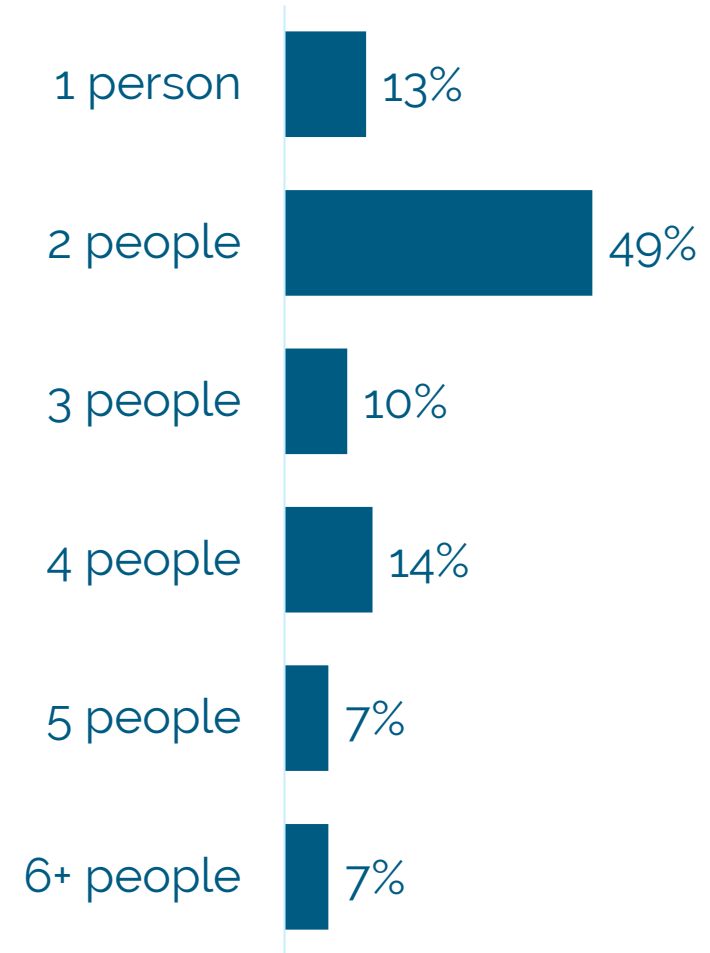
Atlanta*	13%
Jacksonville	10%
Orlando-Daytona Beach-Melbourne	6%
New York*	5%
Savannah	3%
Charlotte*	2%
Columbus, GA	2%
Greenville, SC Area	2%
Macon	2%
Minneapolis-St. Paul*	2%
Philadelphia*	2%
Raleigh-Durham	2%
Tallahassee-Thomasville	2%
Tampa-St. Petersburg	2%

*Markets with direct flights to Jacksonville International Airport

**Includes Jacksonville, FL and Brunswick, GA.

TRAVEL PARTY SIZE

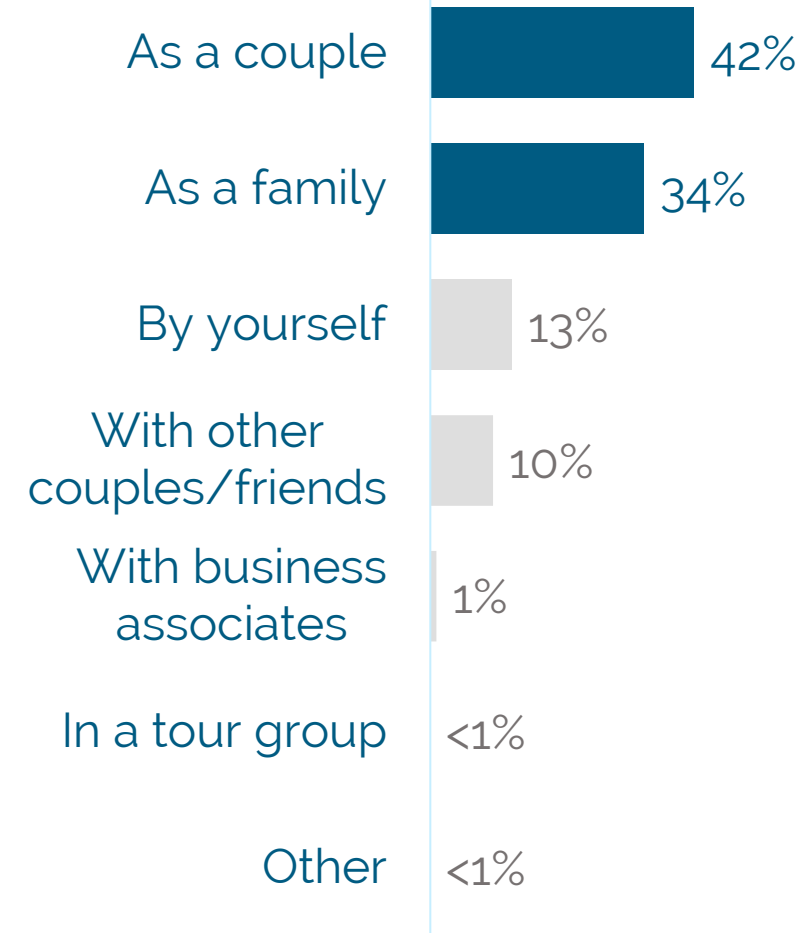
» The typical travel party size was **3.0**



TRAVEL PARTY TYPE

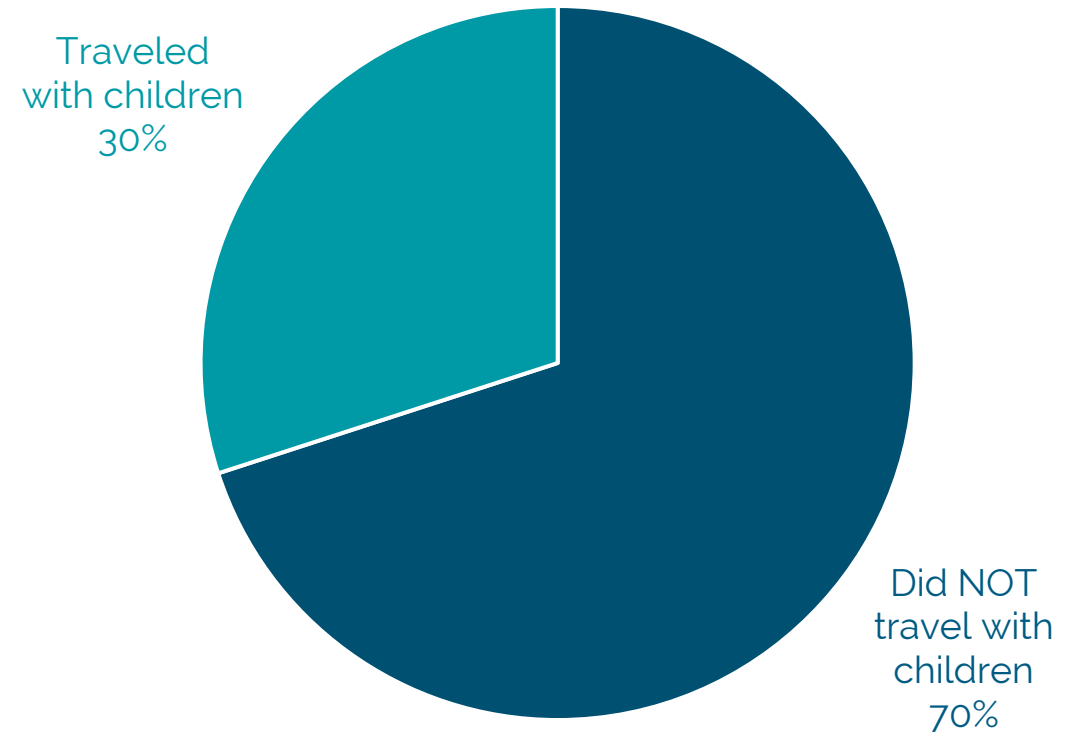
» Over **2 in 5** visitors to the Amelia Island area traveled **as a couple**

» Over **1 in 3** visitors traveled **as a family**



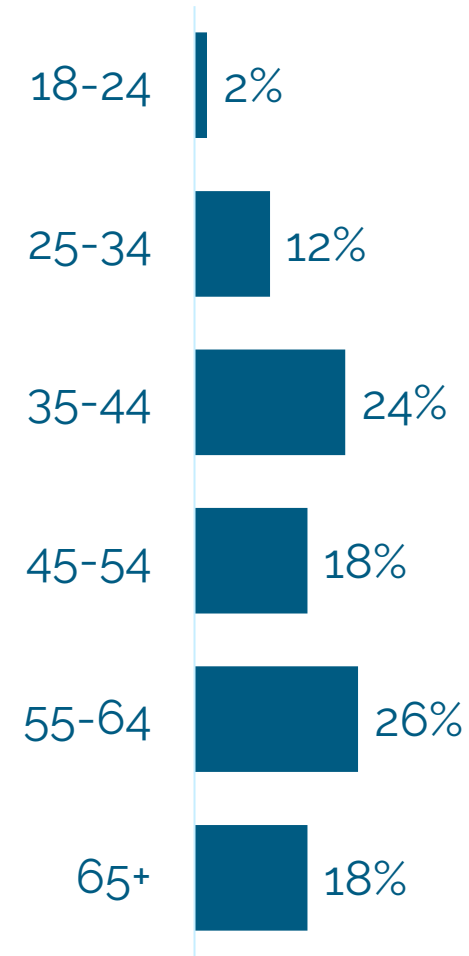
TRAVELED WITH CHILDREN

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



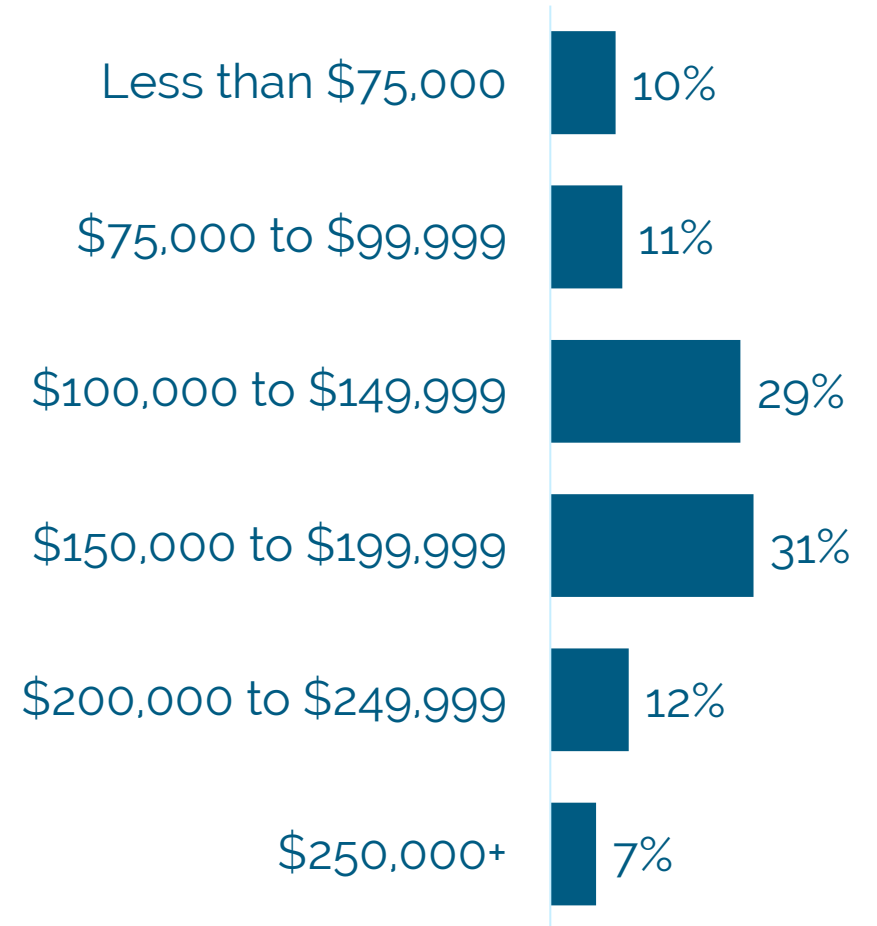
AGE

» The median age of visitors to the Amelia Island area was **51**



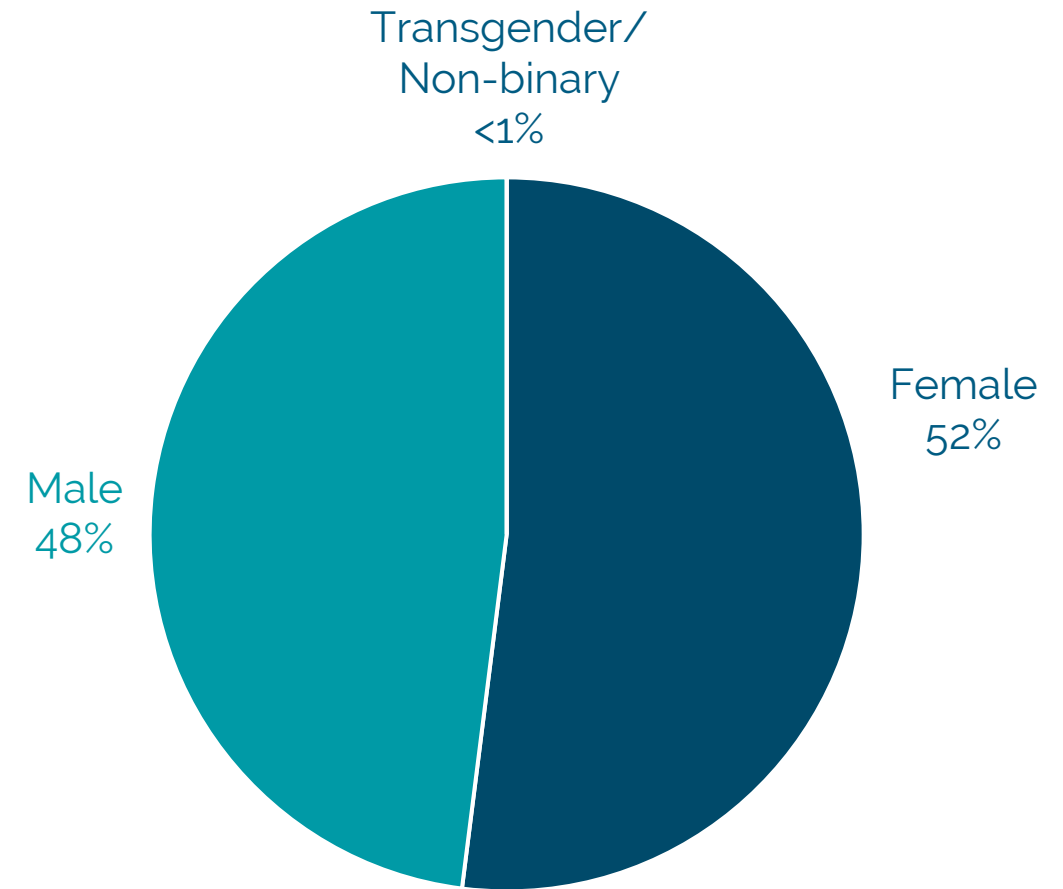
HOUSEHOLD INCOME

- » Visitors to the Amelia Island area had a median annual household income of **\$149,000**
- » **Half** of visitors had household incomes over **\$150,000**



GENDER

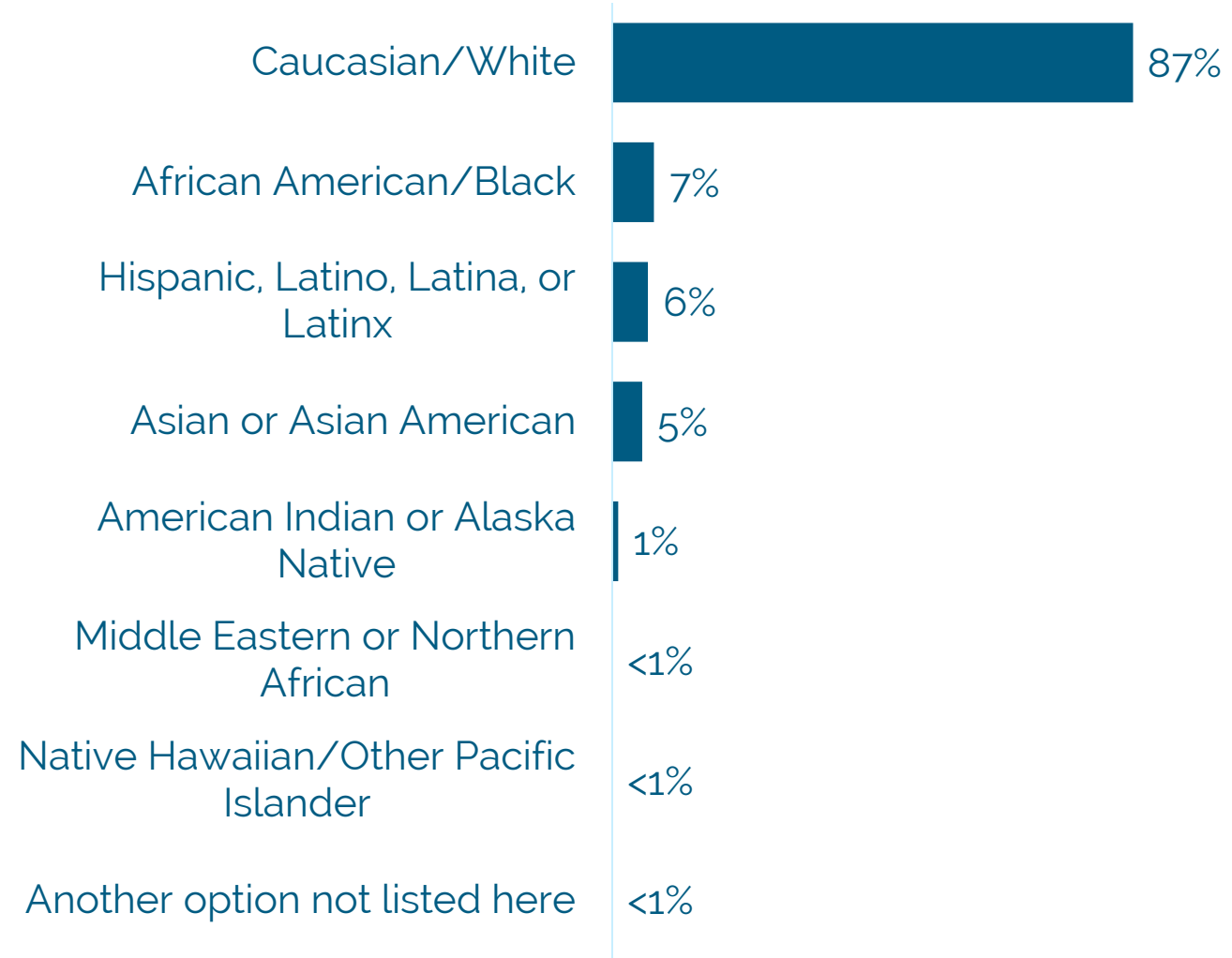
» **52%** of visitors interviewed were **female***



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

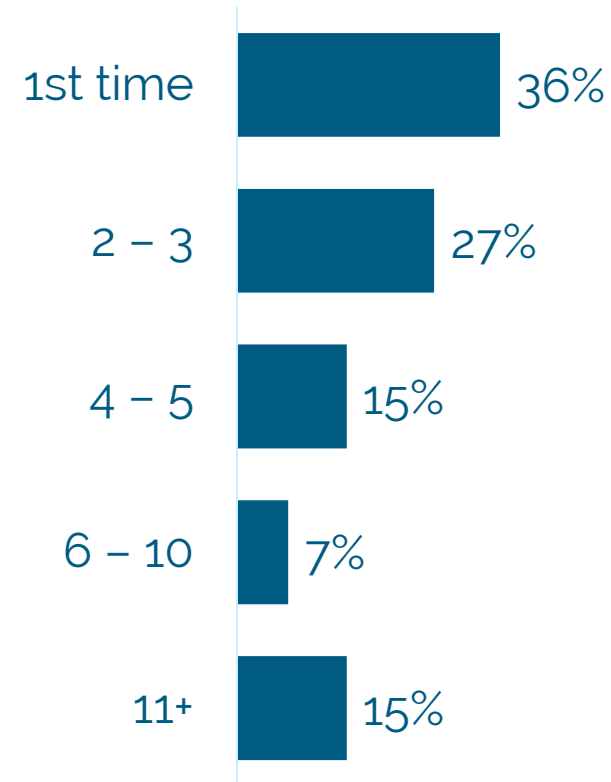
RACE*

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



NEW & RETURNING VISITORS

- » Over **1 in 3** visitors said **this was their first time visiting** the Amelia Island area
- » Nearly **1 in 6** visitors were loyalists, having visited **over 10 times**

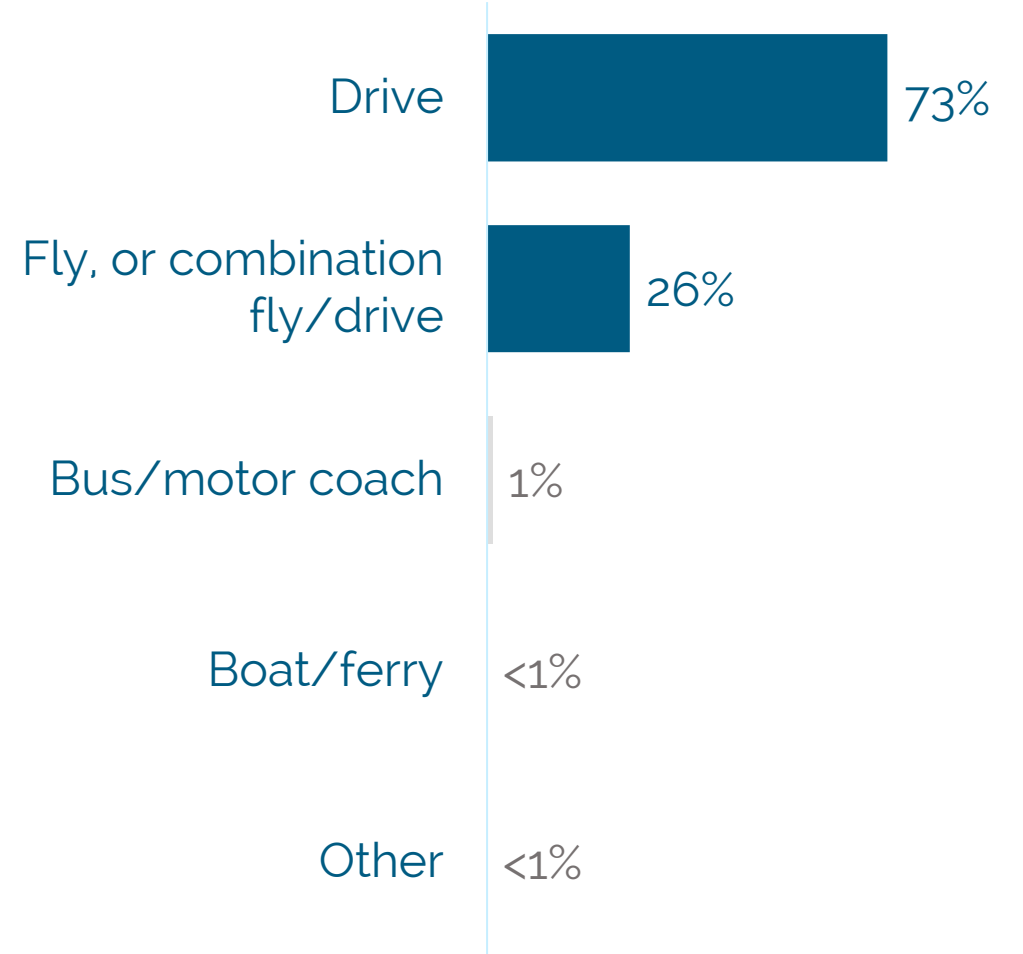


VISITOR JOURNEY: TRIP EXPERIENCE



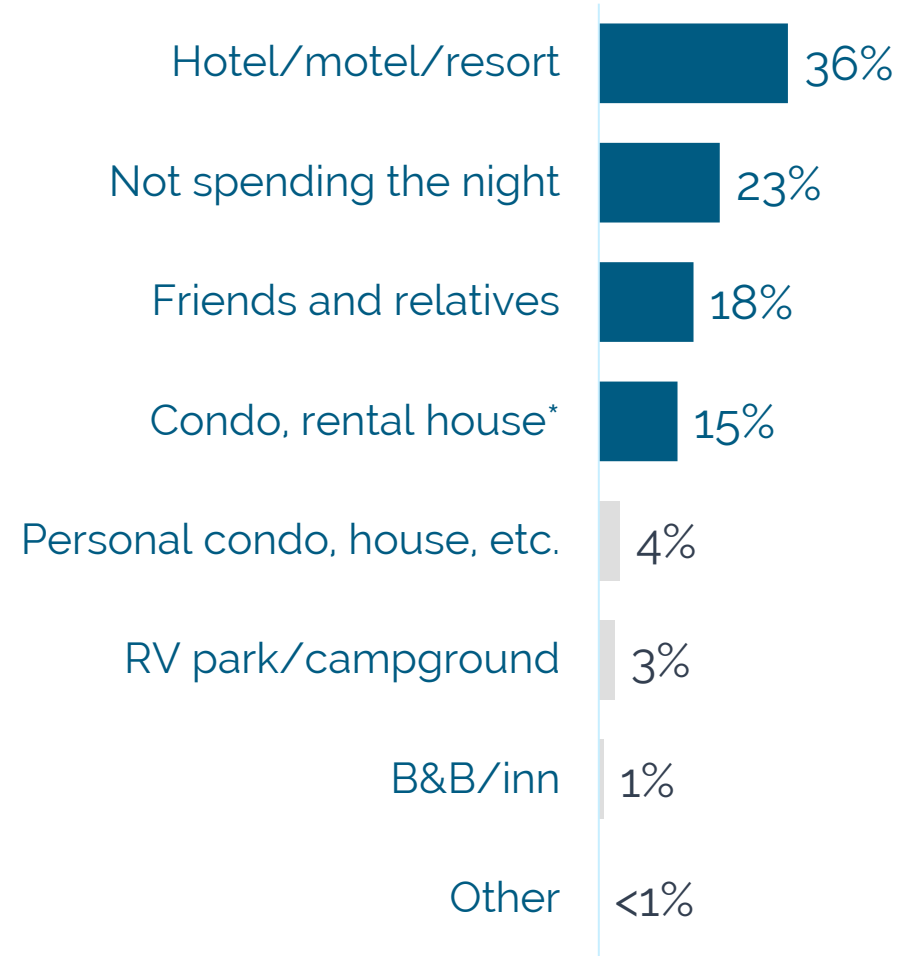
TRANSPORTATION

- » Nearly **3 in 4** visitors **drove** to the Amelia Island area
- » **89%** of visitors who flew to the area used the **Jacksonville International Airport** (**23%** of all visitors)



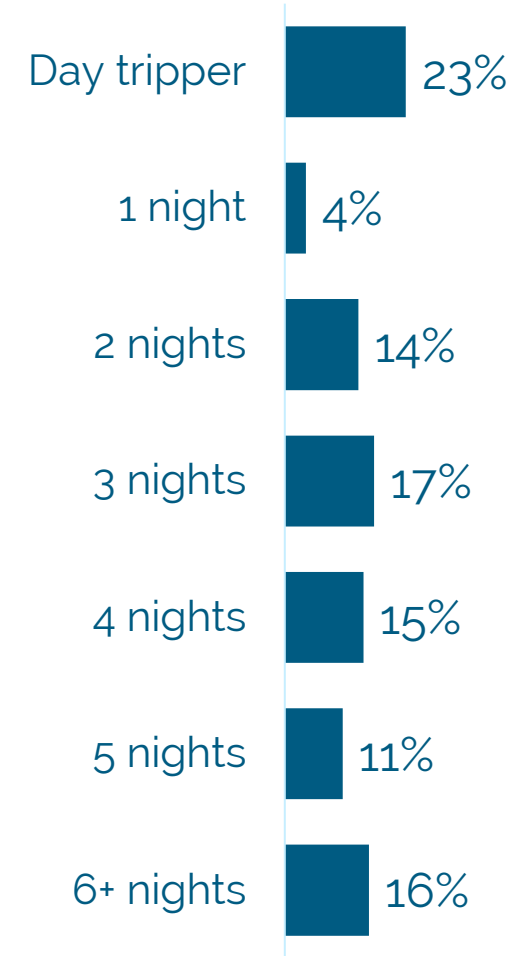
ACCOMMODATIONS

- » Over **1 in 3** visitors stayed overnight in a **hotel, motel, or resort**
- » Nearly **1 in 5** stayed with **friends and relatives**
- » Nearly **1 in 4** did not stay overnight
- » Nearly **1 in 6** stayed at a **condo or rental house**



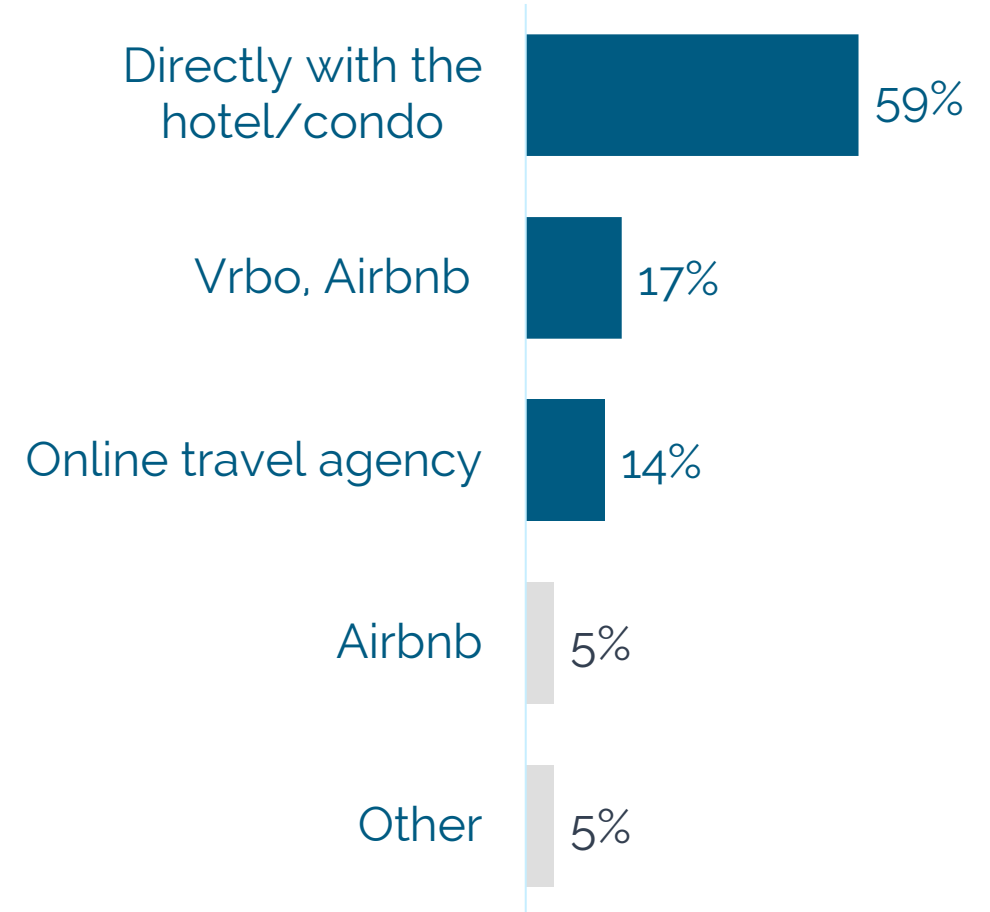
NIGHTS STAYED

- » Typical visitors stayed **3.4 nights** in the Amelia Island area
- » Typical visitors staying in paid accommodations stayed **3.7 nights** in the Amelia Island area



ACCOMMODATION BOOKING

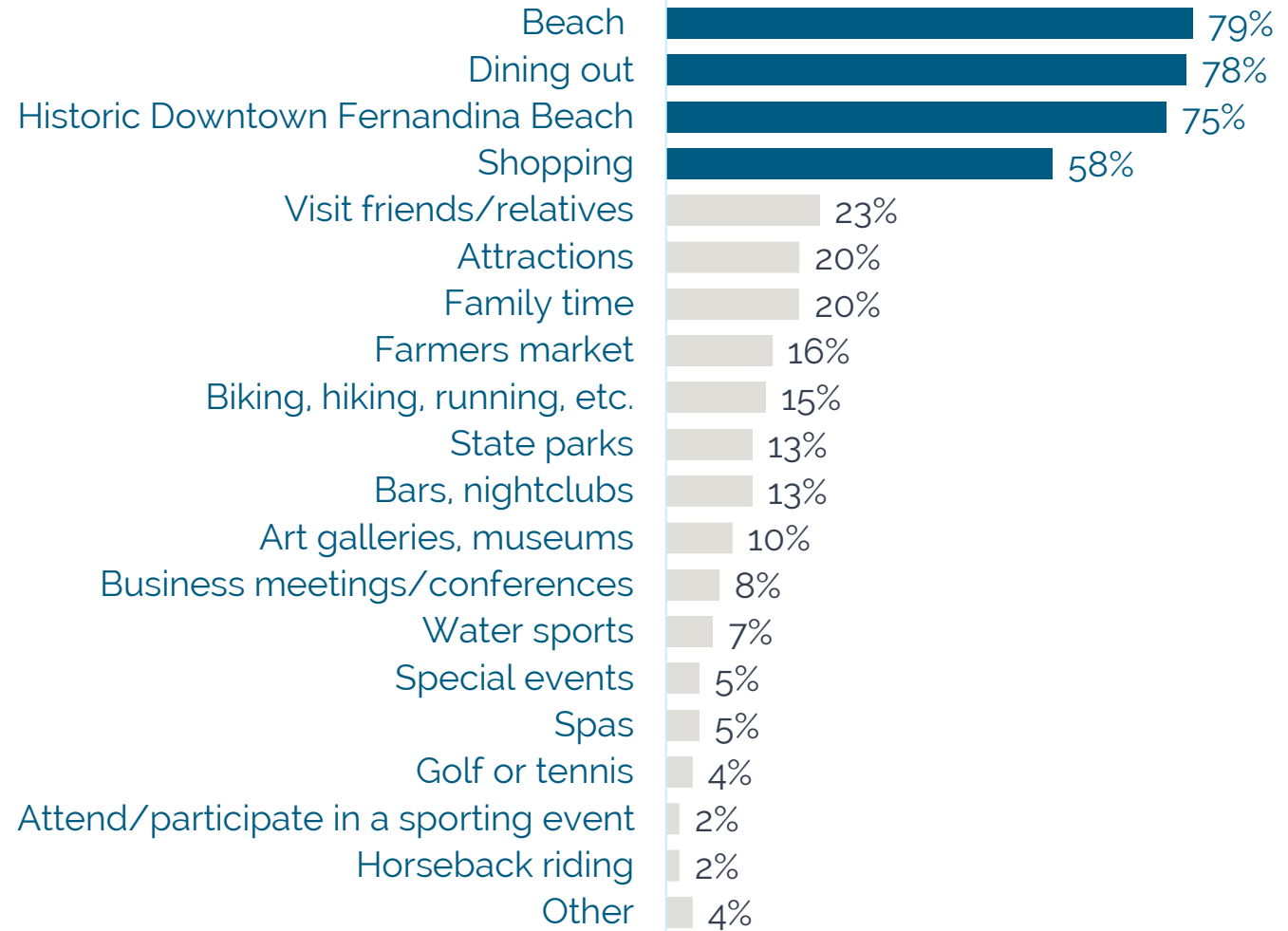
- » Nearly **3 in 5** visitors booked their trip to the Amelia Island area **directly with the hotel/condo**
- » Over **1 in 6** visitors booked through **Vrbo or Airbnb**



VISITOR ACTIVITIES*

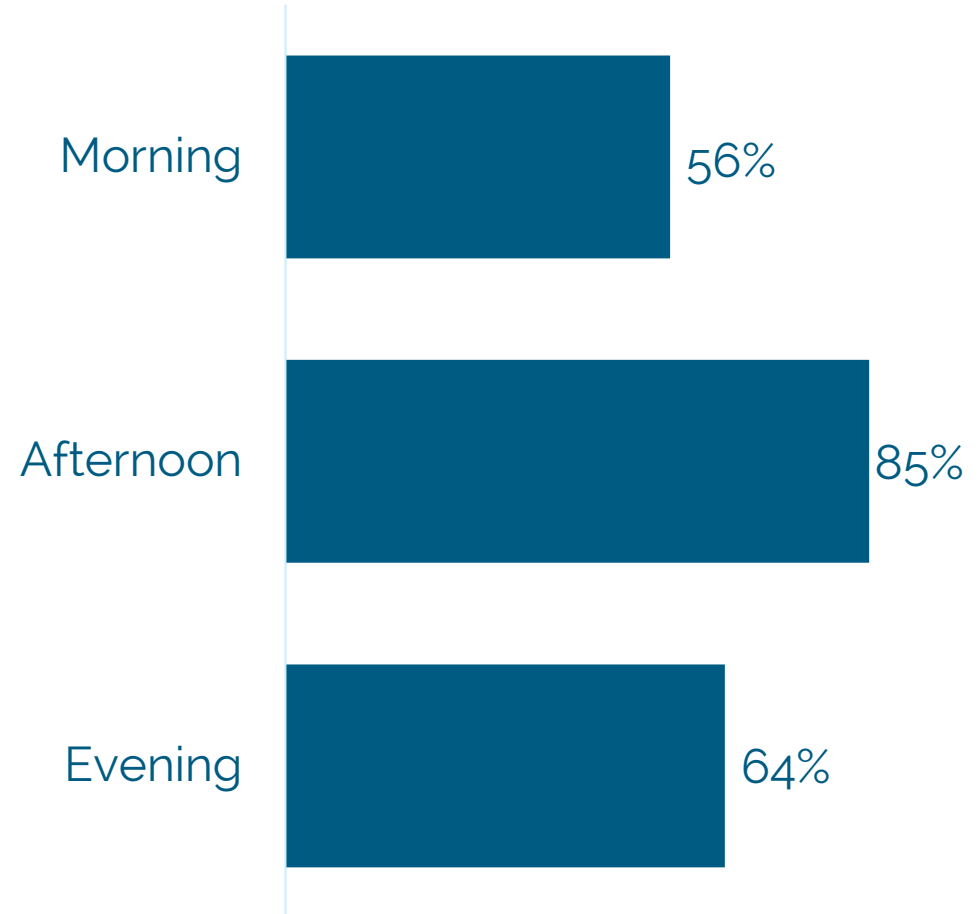
» Top activities enjoyed by visitors this quarter included:

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



VISITING HISTORIC DOWNTOWN*

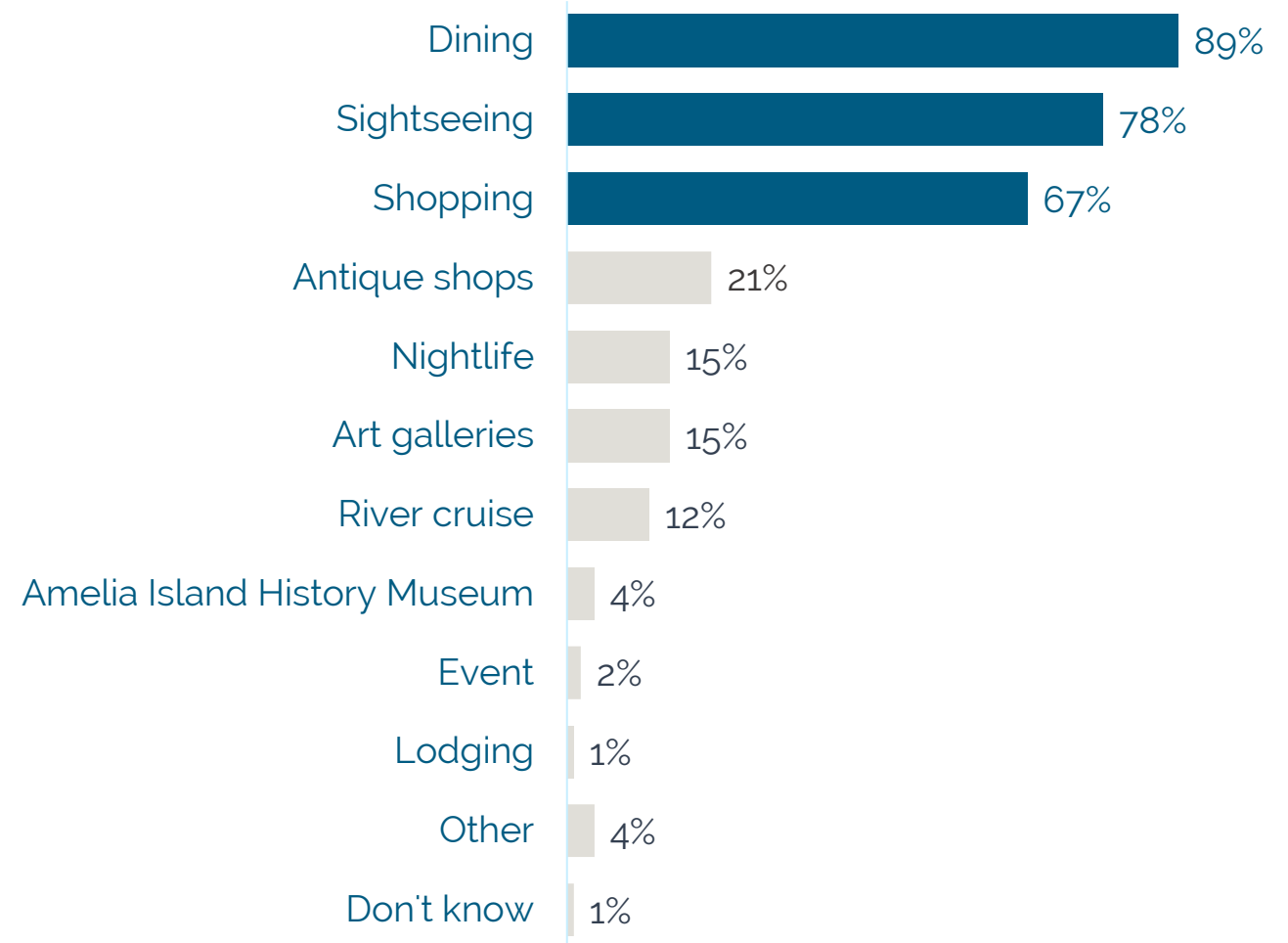
- » Those who visited **Historic Downtown Fernandina Beach** did so an average of **2.5 times** during their stay
- » Nearly **9 in 10** visited during the **afternoon**



*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**
- » Nearly **4 in 5** go to the area to **sightsee**
- » Over **2 in 3** go to the area to **shop**



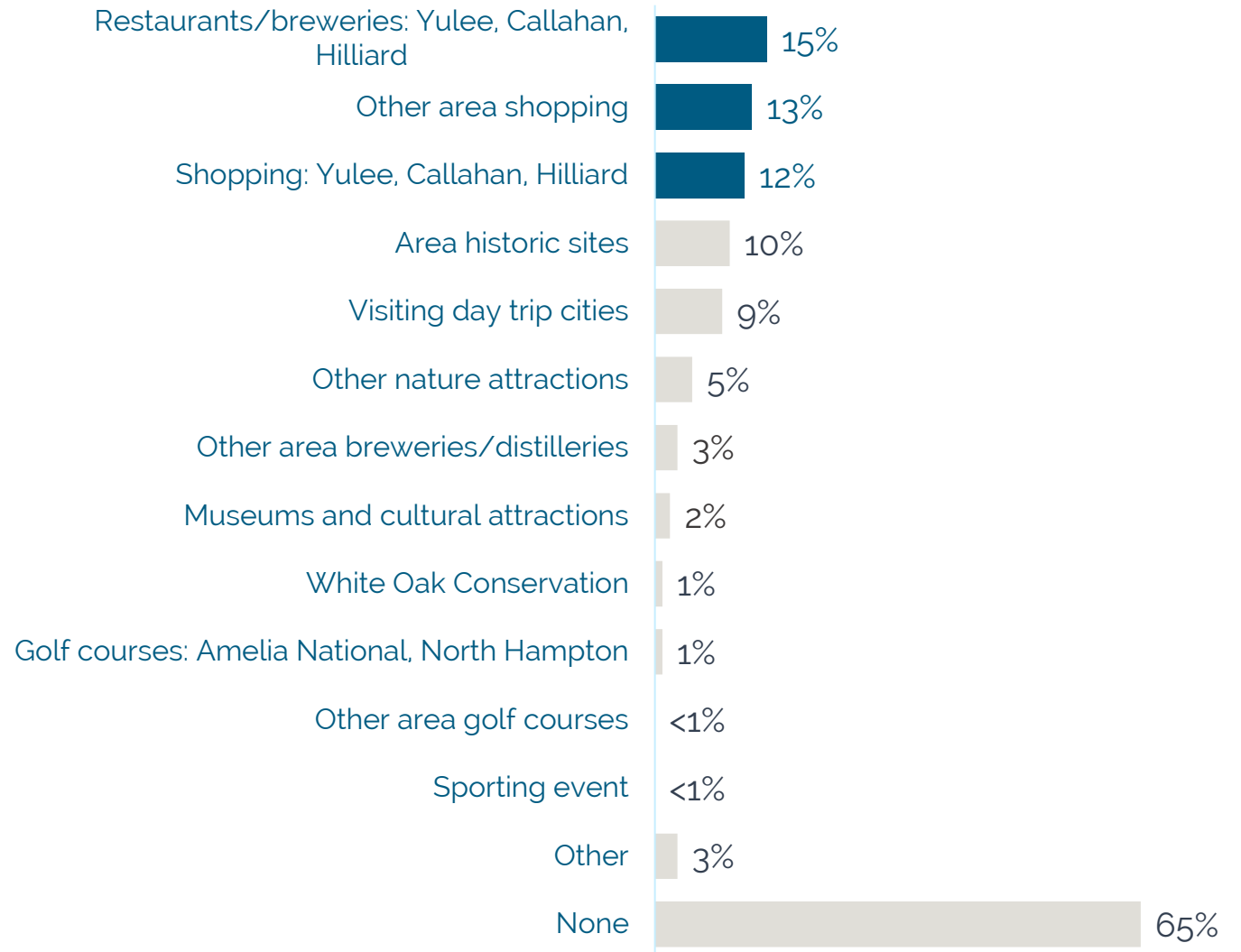
AREAS FOR IMPROVEMENT: DOWNTOWN*



- » Better solutions for parking
- » More activities for children
- » More public restrooms
- » More benches and picnic tables, particularly along the waterfront
- » More coffee shops
- » However, visitors love the pocket park, the flowers, the benches honoring loved ones, and the overall quaint charm.

OFF-ISLAND ACTIVITIES*

- » Around **1 in 7** visitors to Amelia Island also visit **restaurants, breweries, and shops** in Yulee, Callahan, or Hilliard
- » Nearly **2 in 3** Amelia Island visitors do not engage in any activities off-island



*Multiple responses permitted.

TRAVEL PARTY SPENDING

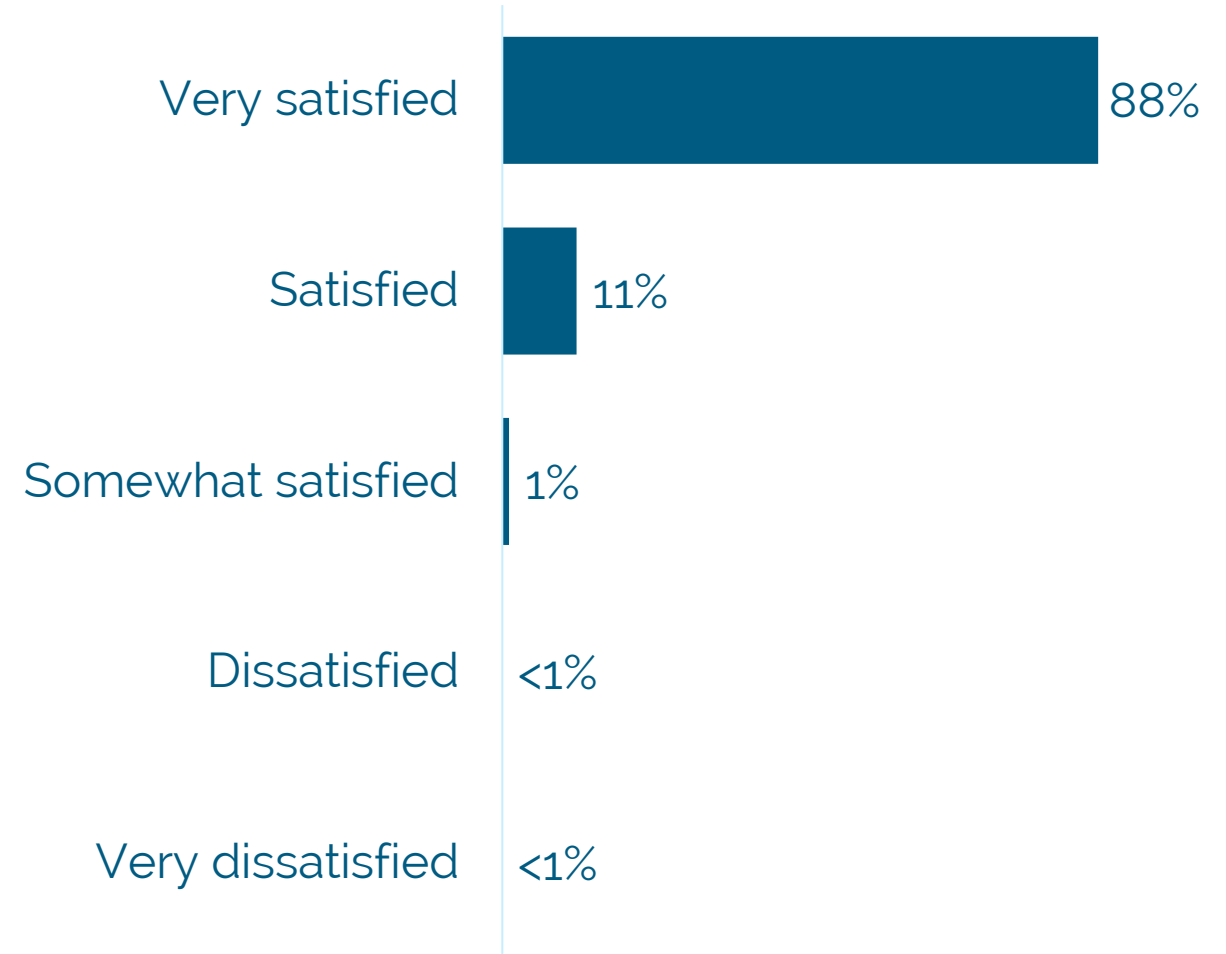
	Daily Spending	Total Spending
Accommodations	\$181	\$615
Restaurants	\$123	\$418
Groceries	\$42	\$143
Shopping	\$99	\$337
Activities & attractions	\$36	\$122
Transportation	\$32	\$109
Other	\$11	\$37
Total	\$524	\$1,782

VISITOR JOURNEY: POST-TRIP



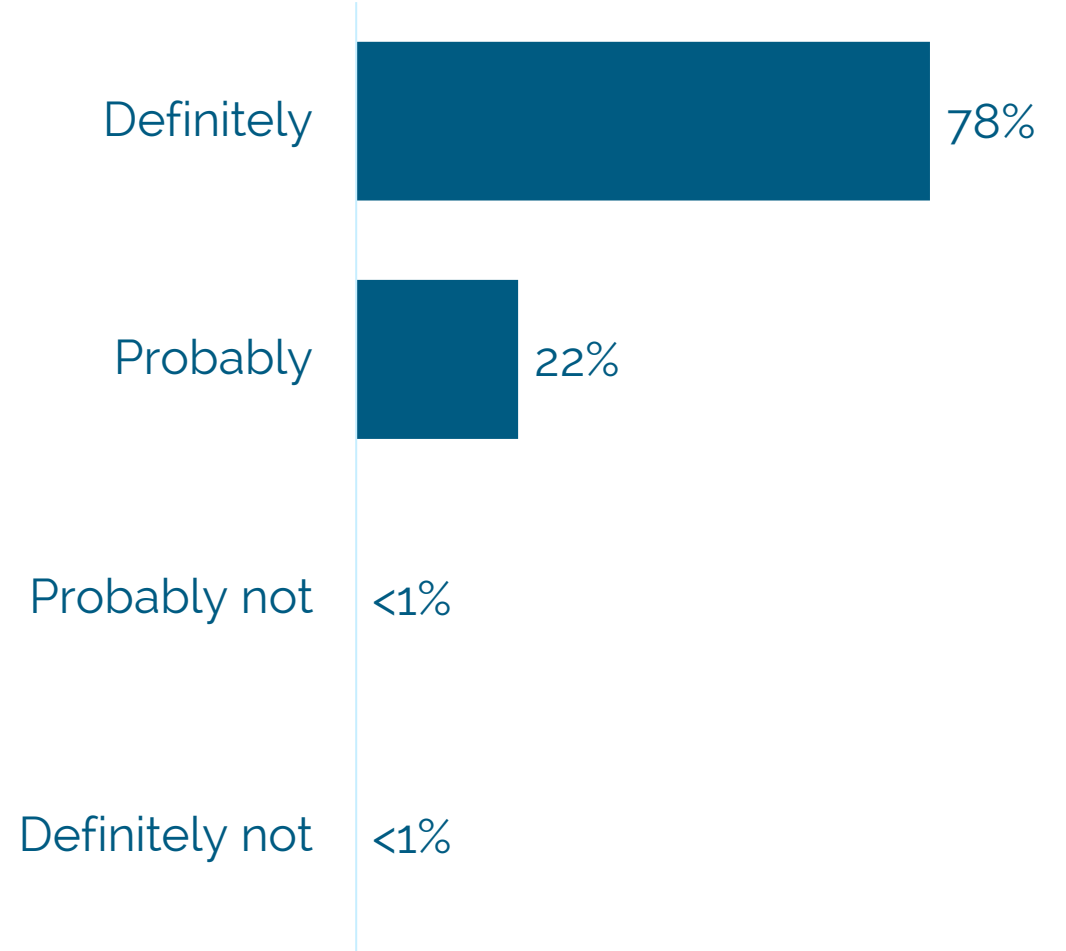
VISITOR SATISFACTION

- » **99%** of visitors were **satisfied** with their trip to Amelia Island
- » Nearly **9 in 10** visitors were **very satisfied** with their trip to Amelia Island



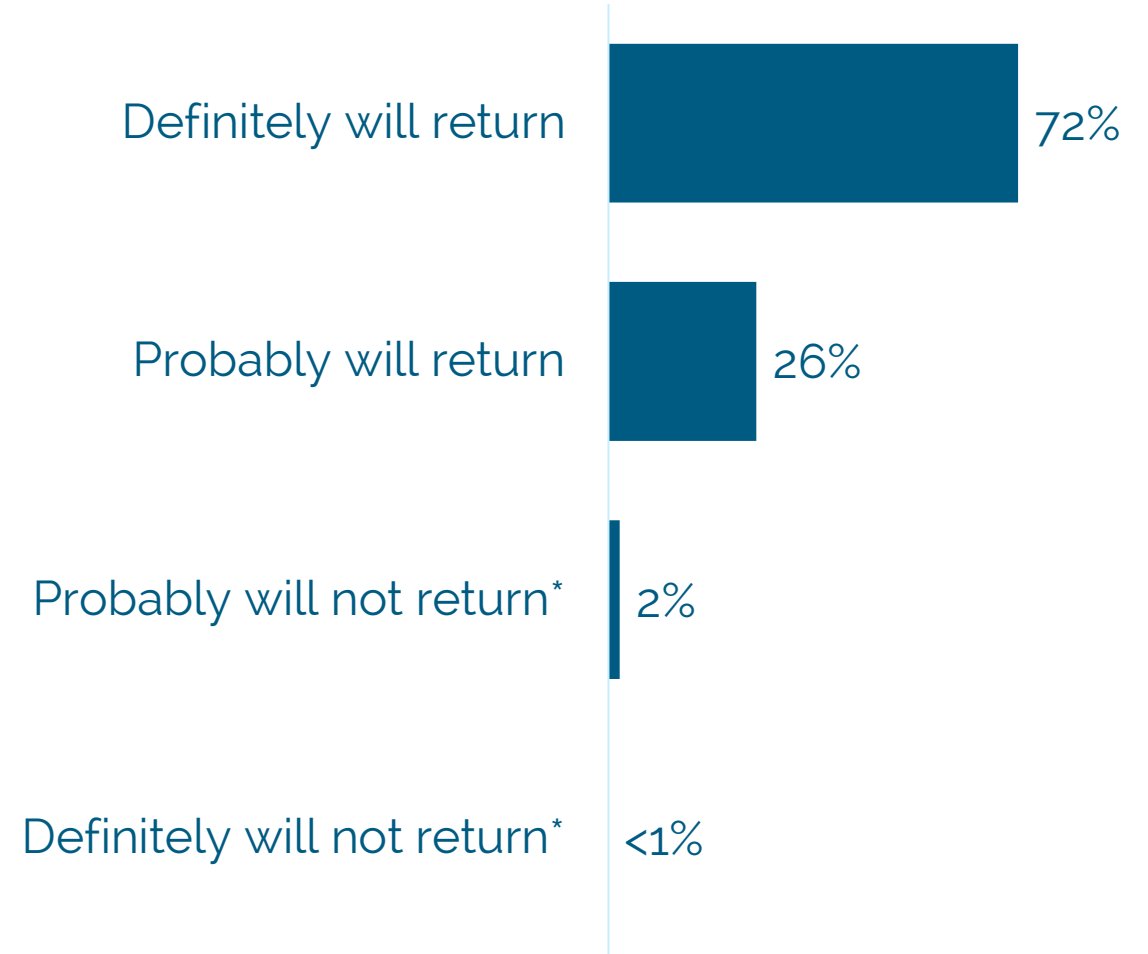
RECOMMENDATION

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



LIKELIHOOD OF RETURNING

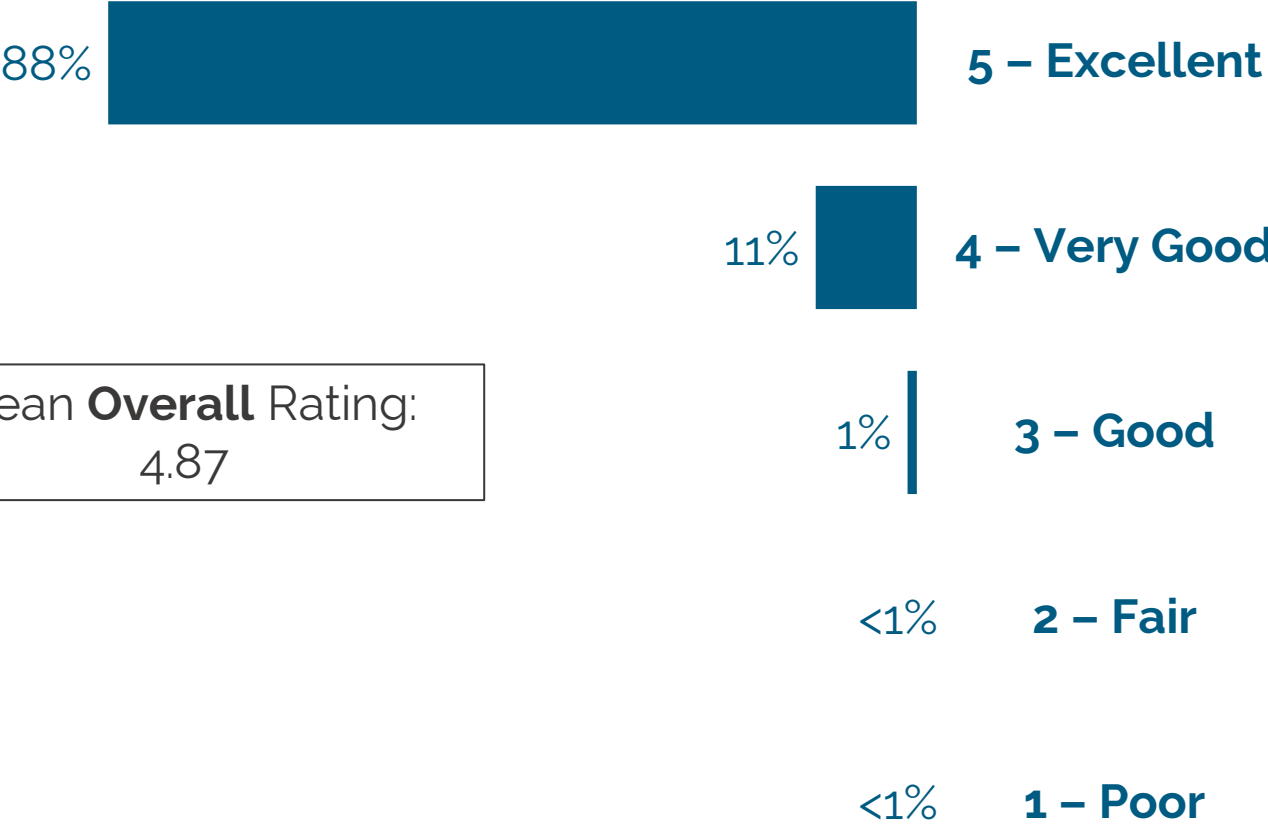
- » **98%** of visitors **will return** to the Amelia Island area
- » Over **7 in 10** visitors will **definitely return** to the Amelia Island area
- » The most frequently stated reasons for not returning were only having gone for a specific occasion and a preference for variety in vacation spots



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

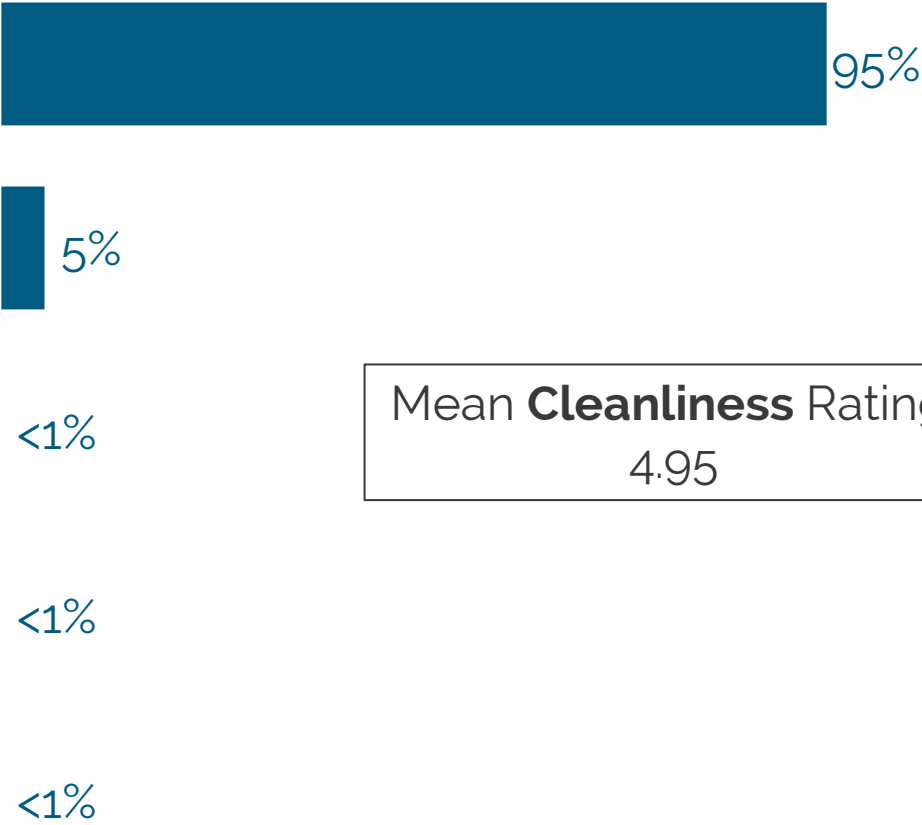
BEACH RATINGS

Overall Beach Rating



Mean **Overall** Rating:
4.87

Beach Cleanliness Rating



Mean **Cleanliness** Rating:
4.95

AREA DESCRIPTIONS*



- » "Amelia Island is quaint, charming, and tranquil, with good beaches and good people!"
- » "It's a high-end beach town. Downtown is remarkable, and the beaches are first-class. It reminds me of Portugal!"
- » "The parking is easy, which makes me feel like you want visitors here!"
- » "It's much more relaxing than other, more crowded beaches. A nice, quiet little island – truly 'Old Florida'."
- » "Amelia Island is a chill, idyllic destination with a growth problem."
- » "The island has a lot of history, including old architecture. The beaches are glorious, but there's more to do here than just that!"
- » "It's a great place for anything – a wedding, a conference, a guys' golf trip, or a family vacation."



Visitor Tracking Study

- » Interviews were completed with [531 visitors](#) in person at events, the beach, The Shops at The Omni, downtown, and online, between [April 1, 2024](#), and [June 30, 2024](#).

Amelia Island CVB

Visitor Tracking Study April – June 2024

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