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**Third Quarter 2013 Visitor Profile (*July – September*)
Amelia Island Tourist Development Council**



Prepared for:

Amelia Island Tourist Development Council

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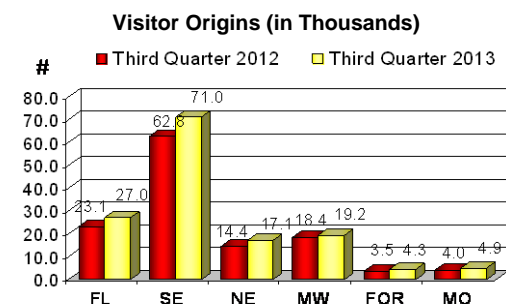
December 2013

Amelia Island Visitor Profile | Third Quarter 2013 (Jul. – Sep.)

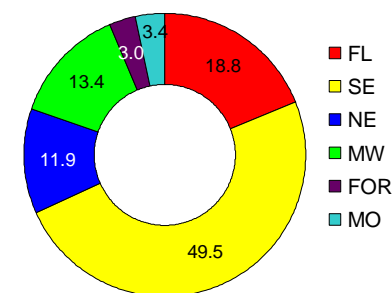
H/M/C/C Visitor Statistics *	FY 2012	FY 2013	% Δ '12/'13	Q3 2012	Q3 2013	% Δ '12/'13
Visitors (#)	459,600	504,300	+9.7	126,300	143,500	+13.6
Direct Expenditures (\$)	\$274,125,500	\$320,873,500	+17.1	\$74,775,900	\$92,378,100	+23.5
Total Economic Impact (\$)	\$360,667,152	\$422,173,300	+17.1	\$98,382,652	\$121,541,900	+23.5

* H/M/C/C: Visitors staying in a commercial lodging (hotel, motel, condo, or campground).

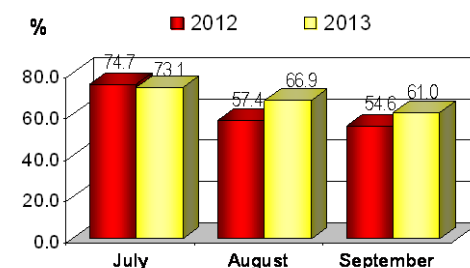
Visitor Origin	FY 2012	FY 2013	% Δ '12/'13	Q3 2012	Q3 2013	% Δ '12/'13
Florida	91,258	105,317	+15.4	23,113	26,978	+16.7
Southeast	193,973	206,967	+6.7	62,771	71,033	+13.2
Northeast	66,868	74,295	+11.1	14,398	17,076	+18.6
Midwest	68,871	75,790	+10.0	18,440	19,229	+4.3
Foreign	16,722	18,847	+12.7	3,536	4,305	+21.7
Markets of Opportunity	21,908	23,084	+5.4	4,042	4,879	+20.7
Total	459,600	504,300	+9.7	126,300	143,500	+13.6



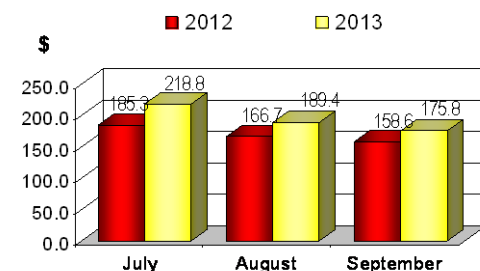
Third Quarter 2013 Visitor Origin Distribution (%)



Occupancy



Room Rates



Occupancy and ADR **	July	August	September
Occupancy 2013	73.1%	66.9%	61.0%
Occupancy 2012 †	74.7	57.4	54.6
Δ % ('12/'13)	-2.1%	+16.6%	+11.7%
ADR 2013	\$218.83	\$189.44	\$175.79
ADR 2012 †	185.28	166.66	158.60
Δ % ('12/'13)	+18.1%	+13.7%	+10.8%
RevPAR 2013	\$160.07	\$126.66	\$107.27
RevPAR 2012 †	138.45	95.66	86.62
Δ % ('12/'13)	+15.6%	+32.4%	+23.8%

** Source: Smith Travel Research

† 2012 Update

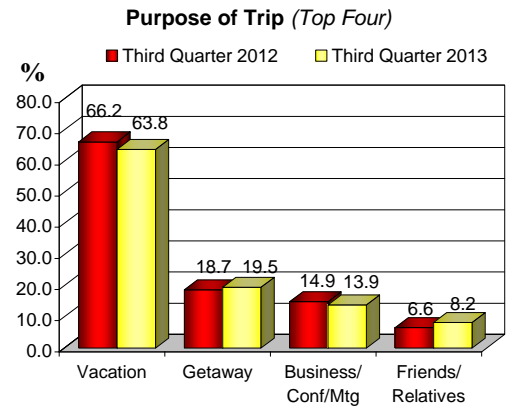
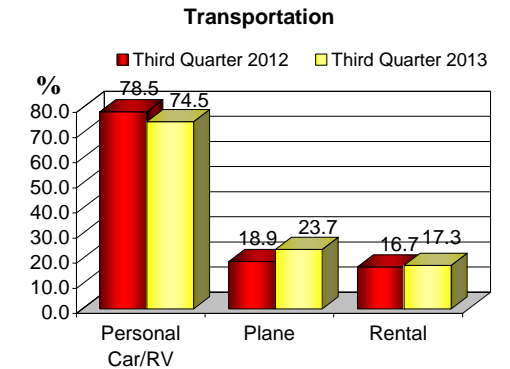
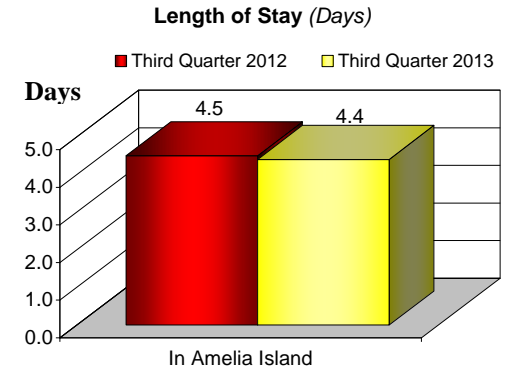
THIRD QUARTER TOP ORIGINS (2012-2013)

	<u>States of Origin</u>	
	<u>2012 Rank</u>	<u>2013 Rank</u>
Florida	2	1
Georgia	1	2
Tennessee	5	3
South Carolina	3	4
North Carolina	7	5
Pennsylvania	6	6
New York	8	7
Illinois	10	8
Ohio	4	9
Virginia	9	10

	<u>DMA's</u>	
	<u>2012 Rank</u>	<u>2013 Rank</u>
Atlanta	1	1
Jacksonville	2	2
Greater Orlando Area	3	3
Tampa/St. Petersburg	5	4
New York/New Jersey	6	5
Philadelphia	--	6
Greenville/Spartanburg	7	7
Nashville	10	8
Washington, D.C.	8	9
Miami/Ft. Lauderdale	9	10
Chicago	--	11

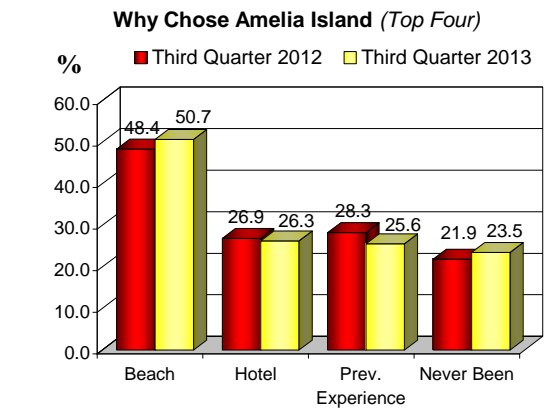
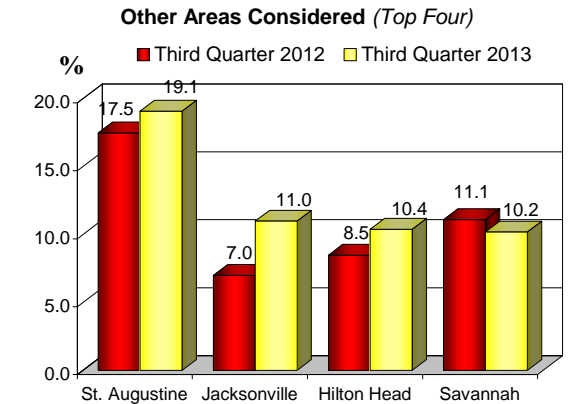
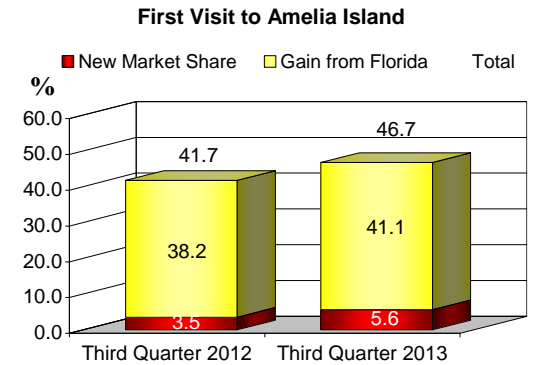
Amelia Island Visitor Profile | Third Quarter 2013 (Jul. – Sep.)

	<u>Third Quarter 2012</u> <i>n = 604</i>	<u>Third Quarter 2013</u> <i>n = 548</i>
Length of Stay (Days) In Amelia Island	4.5 days	4.4 days
Party Size (# of People)	3.0 people	2.9 people
Travel Party (Multiple Response)		
Couple	42.5%	44.8%
Family	40.0	39.6
Group of Friends	8.0	7.7
Single	8.2	6.6
Extended Family	5.1	4.3
Have Children or Young Adults in Immediate Travel Party (% Yes)	37.9%	36.7%
Transportation Mode (Multiple Response)		
Personal Car/RV	78.5%	74.5%
Plane	18.9	23.7
Rental Car	16.7	17.3
Airport Deplaned (Base: Flew)		
Jacksonville International	84.8%	80.4%
Orlando International/Sanford	6.6	7.7
Purpose of Trip (Multiple Response)		
Vacation	66.2%	63.8%
A Getaway	18.7	19.5
Business/Conference/Meeting	14.9	13.9
Visit with Friends and Relatives	6.6	8.2
Wedding	3.7	5.6
Special Event/Festival	3.1	5.1



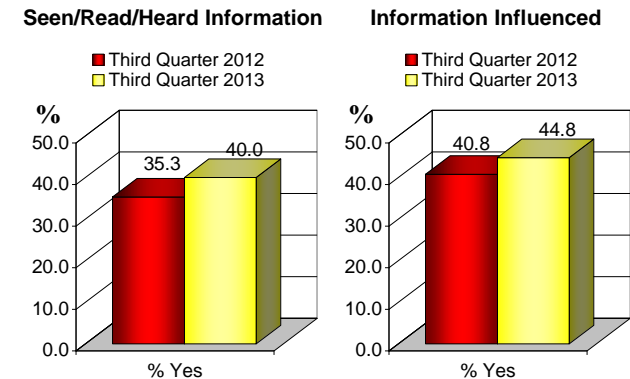
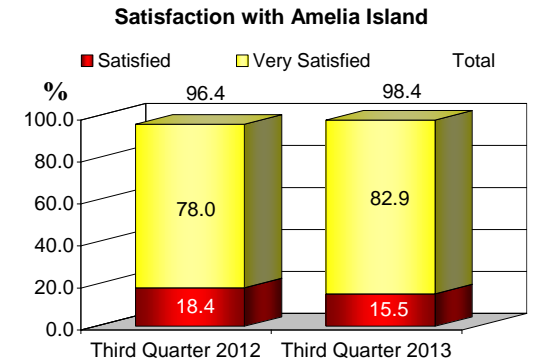
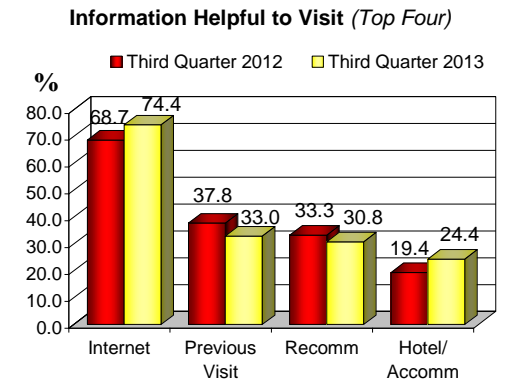
Amelia Island Visitor Profile | Third Quarter 2013 (Jul. – Sep.)

	<u>Third Quarter 2012</u> <i>n = 604</i>	<u>Third Quarter 2013</u> <i>n = 548</i>
First Visit to (% Yes)		
Amelia Island	41.7%	46.7%
Florida	3.5	5.6
Other Southeast Areas Considered for this Trip <i>(Multiple Response)</i>		
Considered Only Amelia Island	52.8%	57.2%
St. Augustine/Ponte Vedra	17.5	19.1
Jacksonville Area	7.0	11.0
Hilton Head	8.5	10.4
Savannah	11.1	10.2
Jekyll Island	9.0	7.7
Orlando	8.0	6.0
Myrtle Beach	6.7	4.7
Why Chose Amelia Island <i>(Multiple Response)</i>		
Beach	48.4%	50.7%
Hotel/Accommodations	26.9	26.3
Previous Experience	28.3	25.6
Never Been/Try Something New	21.9	23.5
Love/Like the Area	21.9	20.5
Appealing Brochures/Websites	20.5	20.1
Family Oriented Area	21.1	19.6
Recommendation	20.9	16.0
Visiting with Friends/Family	16.0	15.6
Weather	17.6	15.4
Nature/Environment	18.8	15.2
Convenient Location	19.7	13.2
History	13.4	12.5
Attractions	11.1	10.9
Business/Meeting	12.6	10.5
Event	7.5	6.6



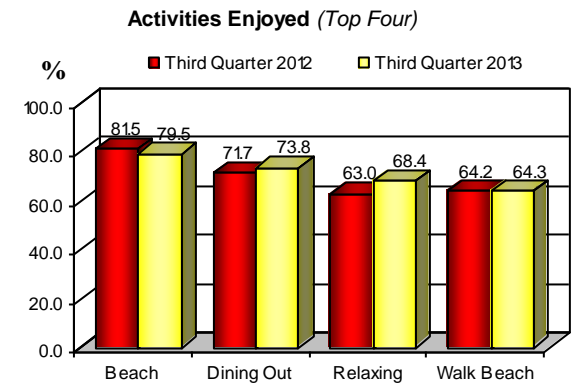
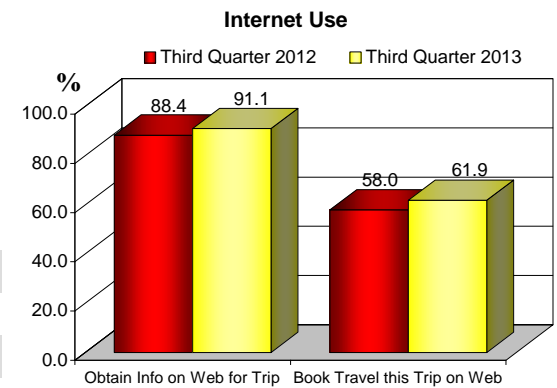
Amelia Island Visitor Profile | Third Quarter 2013 (Jul. – Sep.)

	<u>Third Quarter 2012</u> <i>n = 604</i>	<u>Third Quarter 2013</u> <i>n = 548</i>
Information Most Helpful to Visit (Multiple Response)		
Internet	68.7%	74.4%
Previous Visit	37.8	33.0
Recommendation	33.3	30.8
Hotel/Accommodations	19.4	24.4
Family	15.5	16.8
Maps	11.5	14.2
Print Media	10.3	9.3
Business/Conference/Meeting	10.1	8.3
Special Event	5.0	4.2
Travel Planning Window (2013)		
How Far in Advance Start Planning Trip	--	55.0 days
How Far in Advance Book Reservations for Trip	--	35.2 days
Satisfaction with Amelia Island		
Very Satisfied	78.0%	82.9%
Satisfied	18.4	15.5
Satisfaction Level (Very Satisfied + Satisfied)	96.4%	98.4%
Recommend Amelia Island to Friends/Relatives		
Yes	98.2%	97.0%
Plan to Return (% Yes)		
To Local Area	91.0%	92.1%
Demographics		
Average Age Head of Household (Years)	48.0	47.6
Median Annual Household Income	\$126,233	\$132,680
Seen/Read/Heard Amelia Island Information (% Yes)		
	35.3%	40.0%
Influenced by Amelia Island Information <i>(Base: Respondents Reporting Seen/Read/Heard Information)</i>		
	40.8%	44.8%
Amelia Island Base Budget		
Total	\$1,776.16	\$1,866.88
Per Person/Trip	592.05	643.75
Per Person/Day	131.57	146.31



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	<u>Third Quarter 2012</u> <i>n = 604</i>	<u>Third Quarter 2013</u> <i>n = 548</i>
Used Internet to Get Travel Information for this Trip (% Yes)	88.4%	91.1%
Booked Travel for this Trip on the Internet (% Yes)	58.0%	61.9%
Activities Enjoyed in Area (Multiple Response)		
Beach	81.5%	79.5%
Dining Out	71.7	73.8
Relaxing	63.0	68.4
Walking on the Beach	64.2	64.3
Historic Downtown	60.9	62.4
Shopping	54.5	59.6
Pool	32.2	35.5
Sight-Seeing	34.2	35.0
Shelling	33.9	33.3
Reading	27.2	32.7
State Parks	26.9	28.2
Swimming	23.4	26.2
Wildlife/Environment	22.1	19.5
Antiquing	13.7	18.1
Bars/Nightlife	14.8	17.9
Visiting with Friends/Relatives	14.1	15.4
Exercising	12.0	13.5
Art Galleries	11.2	12.8
Farmers Market	9.0	11.4
Water Cruise	10.6	9.9
Golfing	6.7	8.9
Bird Watching	6.8	8.7
Fishing	8.3	7.1



Attributes that Describe Amelia Island Well

	<u>Third Quarter 2012</u> <i>n = 604</i>	<u>Third Quarter 2013</u> <i>n = 548</i>
Clean Environment	83.3%	87.9%
Beautiful Beaches	80.9	81.6
Safe Destination	76.1	78.7
Family Friendly	73.4	75.8
Complete Relaxation	74.8	74.0
Good Food & Restaurants	71.6	72.8
Upscale Accommodations	62.7	70.5
Historic Downtown	69.2	68.4
Good Value for the Money	62.3	59.3
A Romantic Place	57.5	57.9
Activities for All Ages	46.8	50.4
State Parks	35.2	31.7
Good Golfing	14.3	15.8
Art Galleries	12.9	13.8
Good Fishing	12.7	10.0
Good Water Sports	12.4	8.2

Attributes that Describe Amelia Island (Top Five)

