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**Fourth Quarter 2013 Visitor Profile (October – December)
Amelia Island Tourist Development Council**



Prepared for:

Amelia Island Tourist Development Council

Prepared by:

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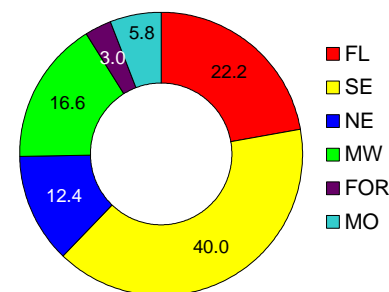
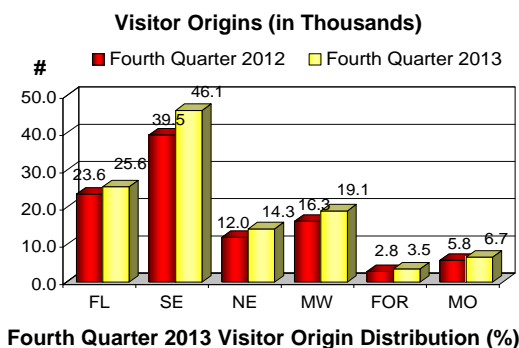
February 2014

Amelia Island Visitor Profile | Fourth Quarter 2013 (Oct. – Dec.)

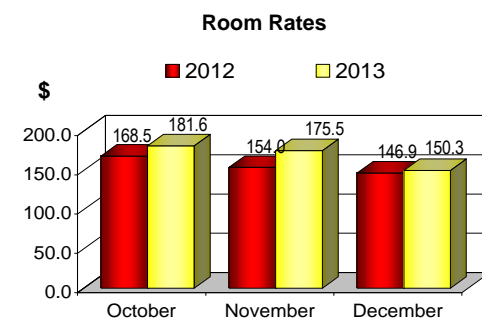
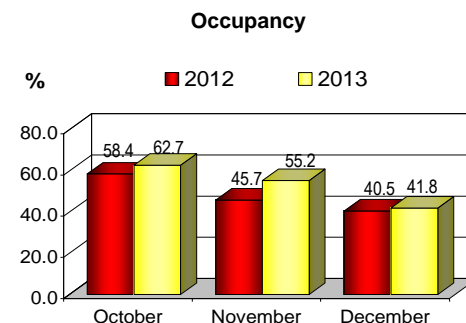
H/M/C/C Visitor Statistics *	CY Annual 2012	CY Annual 2013	% Δ '12/'13	Q4 2012	Q4 2013	% Δ '12/'13
Visitors (#)	461,400	519,400	+12.6	100,100	115,200	+15.1
Direct Expenditures (\$)	\$278,078,500	\$334,634,900	+20.3	\$60,701,600	\$74,463,000	+22.7
Total Economic Impact (\$)	\$365,868,052	\$440,279,200	+20.3	\$79,865,100	\$97,971,000	+22.7

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

Visitor Origin	CY Annual 2012	CY Annual 2013	% Δ '12/'13	Q4 2012	Q4 2013	% Δ '12/'13
Florida	92,175	107,267	+16.4	23,624	25,574	+8.3
Southeast	194,389	213,508	+9.8	39,539	46,080	+16.5
Northeast	66,887	76,568	+14.5	12,012	14,285	+18.9
Midwest	68,968	78,597	+14.0	16,316	19,123	+17.2
Foreign	16,674	19,500	+16.9	2,803	3,456	+23.3
Markets of Opportunity	22,307	23,960	+7.4	5,806	6,682	+15.1
Total	461,400	519,400	+12.6	100,100	115,200	+15.1



Occupancy and ADR **	October	November	December
Occupancy 2013	62.7%	55.2%	41.8%
Occupancy 2012 †	58.4	45.7	40.5
Δ % Occ. ('12/'13)	+7.4%	+20.8%	+3.1%
ADR 2013	\$181.64	\$175.48	\$150.33
ADR 2012 †	168.48	153.96	146.86
Δ % ADR ('12/'13)	+7.8%	+14.0%	+2.4%
RevPAR 2013	\$113.87	\$96.87	\$62.81
RevPAR 2012 †	98.35	70.35	59.50
Δ % RevPAR ('12/'13)	+15.8%	+37.7%	+5.6%



** Source: Smith Travel Research
 † 2012 Update

Amelia Calendar Year Summary

Visitor Statistics	Quarter 1 (Jan. - Mar.)	Quarter 2 (Apr. - Jun.)	Quarter 3 (Jul. - Sep.)	Quarter 4 (Oct. - Dec.)	Calendar Year 2012	Calendar Year 2013	% Δ 2012/2013
H/M/C/C Visitors (#)	122,200	138,500	143,500	115,200	461,400	519,400	+12.6%
Direct Expenditures (\$)	\$74,055,600	\$93,738,200	\$92,378,100	\$74,463,000	\$278,078,500	\$334,634,900	+20.3%
Total Economic Impact	\$97,435,000	\$123,331,300	\$121,541,900	\$97,971,000	\$365,868,052	\$440,279,200	+20.3%

H/M/C/C Visitor Origins	Quarter 1 (Jan. - Mar.)		Quarter 2 (Apr. - Jun.)		Quarter 3 (Jul. - Sep.)		Quarter 4 (Oct. - Dec.)		Calendar Year 2012	Calendar Year 2013	% Δ 2012/2013
	Rel %	# of Vis.	Rel %	# of Vis.	Rel %	# of Vis.	Rel %	# of Vis.	# of Visitors	# of Visitors	
Florida	17.8	21,752	23.8	32,963	18.8	26,978	22.2	25,574	92,175	107,267	+16.4%
Southeast	32.3	39,471	41.1	56,924	49.5	71,033	40.0	46,080	194,389	213,508	+9.8%
Northeast	20.9	25,540	14.2	19,667	11.9	17,076	12.4	14,285	66,887	76,568	+14.5%
Midwest	19.9	24,318	11.5	15,927	13.4	19,229	16.6	19,123	68,968	78,597	+14.0%
Foreign	5.3	6,476	3.8	5,263	3.0	4,305	3.0	3,456	16,674	19,500	+16.9%
Markets of Opp.	3.8	4,643	5.6	7,756	3.4	4,879	5.8	6,682	22,307	23,960	+7.4%
Total	100.0	122,200	100.0	138,500	100.0	143,500	100.0	115,200	461,400	519,400	+12.6%

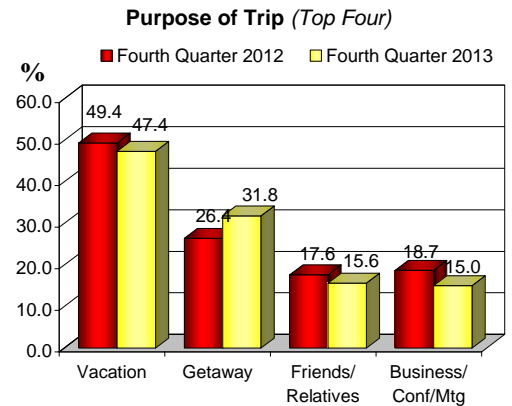
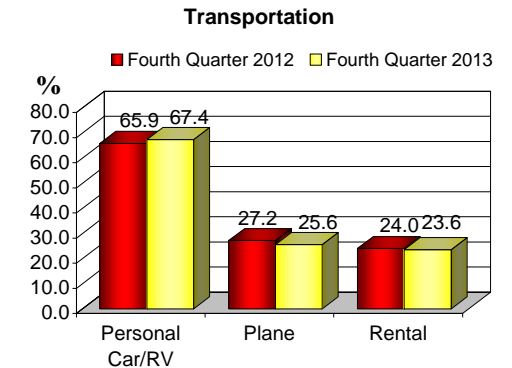
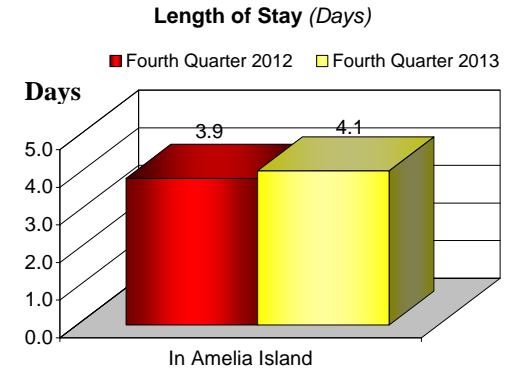
FOURTH QUARTER TOP ORIGINS (2012-2013)

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

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

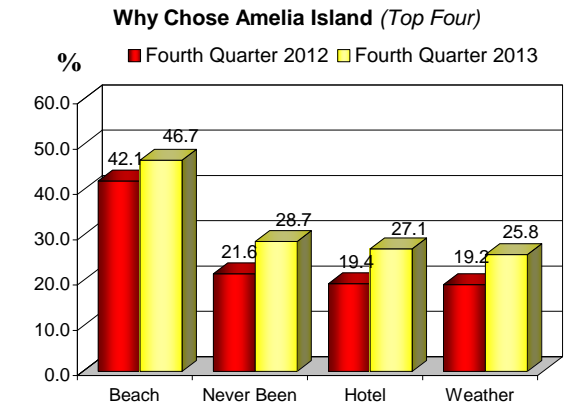
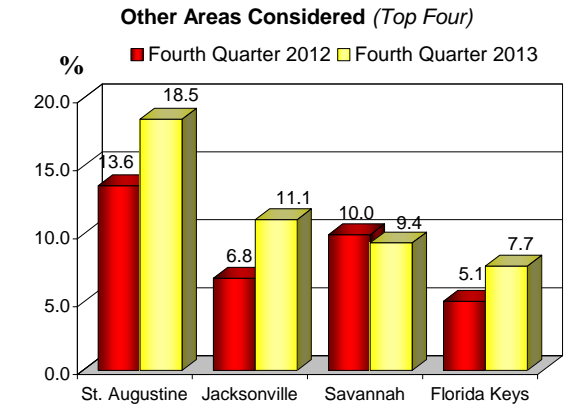
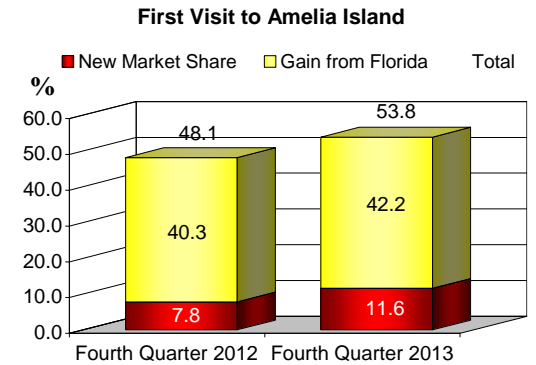
Amelia Island Visitor Profile | Fourth Quarter 2013 (Oct. – Dec.)

	<u>Fourth Quarter 2012</u> <i>n = 552</i>	<u>Fourth Quarter 2013</u> <i>n = 570</i>
Length of Stay (Days) In Amelia Island	3.9 days	4.1 days
Party Size (# of People)	2.5 people	2.6 people
Travel Party (Multiple Response)		
Couple	50.0%	56.5%
Family	23.8	23.0
Single	7.7	9.7
Group of Friends	9.0	6.8
Extended Family	5.9	5.6
Have Children or Young Adults in Immediate Travel Party (% Yes)	20.9%	20.2%
Transportation Mode (Multiple Response)		
Personal Car/RV	65.9%	67.4%
Plane	27.2	25.6
Rental Car	24.0	23.6
Airport Deplaned (Base: Flew)		
Jacksonville International	82.0%	87.6%
Orlando International/Sanford	8.7	6.7
Purpose of Trip (Multiple Response)		
Vacation	49.4%	47.4%
A Getaway	26.4	31.8
Visit with Friends and Relatives	17.6	15.6
Business/Conference/Meeting	18.7	15.0
Wedding/Honeymoon	5.0	8.3
Special Event/Festival	5.4	5.8



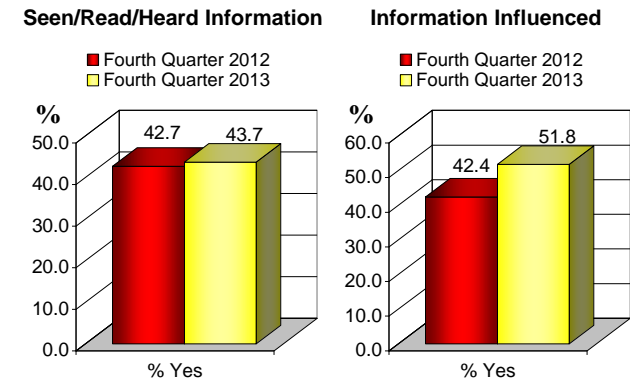
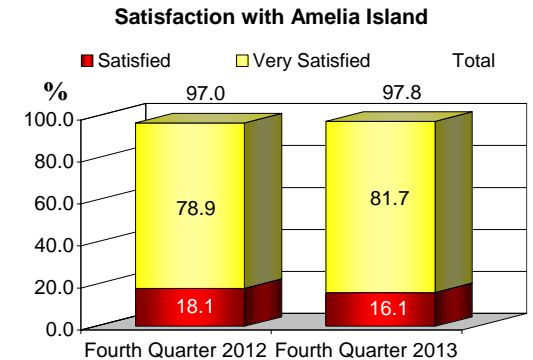
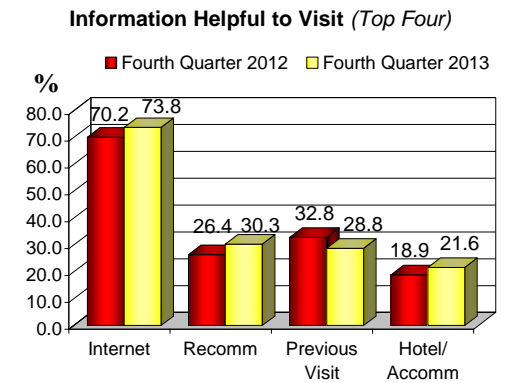
Amelia Island Visitor Profile | Fourth Quarter 2013 (Oct. – Dec.)

	<u>Fourth Quarter 2012</u> <i>n = 552</i>	<u>Fourth Quarter 2013</u> <i>n = 570</i>
First Visit to (% Yes)		
Amelia Island	48.1%	53.8%
Florida	7.8	11.6
Other Southeast Areas Considered for this Trip <i>(Multiple Response)</i>		
Considered Only Amelia Island	63.1%	58.3%
St. Augustine/Ponte Vedra	13.6	18.5
Jacksonville Area	6.8	11.1
Savannah	10.0	9.4
Florida Keys	5.1	7.7
Hilton Head	6.9	7.4
Orlando	6.1	6.8
Jekyll Island	4.7	3.7
Why Chose Amelia Island <i>(Multiple Response)</i>		
Beach	42.1%	46.7%
Never Been/Try Something New	21.6	28.7
Hotel/Accommodations	19.4	27.1
Weather	19.2	25.8
Appealing Brochures/Websites	18.3	24.5
Recommendation	19.5	24.4
Nature/Environment	19.9	21.2
Visiting with Friends/Family	17.0	18.5
Previous Experience	18.4	16.9
Business/Meeting	16.2	15.6
Love/Like the Area	17.4	15.5
Convenient Location	16.0	13.4
Family Oriented Area	11.3	10.7
History	9.7	9.5
Attractions	7.2	8.8
Event	6.5	6.0



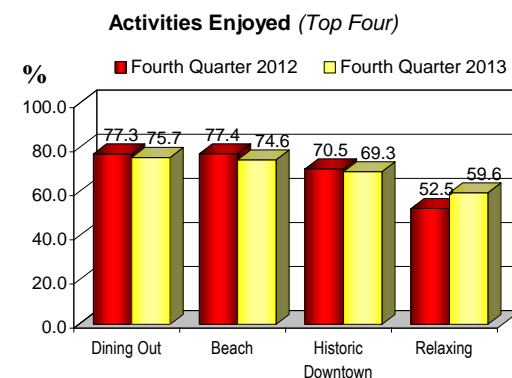
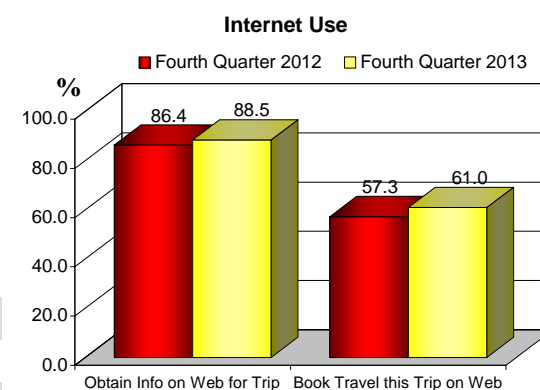
Amelia Island Visitor Profile | Fourth Quarter 2013 (Oct. – Dec.)

	<u>Fourth Quarter 2012</u> <i>n = 552</i>	<u>Fourth Quarter 2013</u> <i>n = 570</i>
Information Most Helpful to Visit (Multiple Response)		
Internet	70.2%	73.8%
Recommendation	26.4	30.3
Previous Visit	32.8	28.8
Hotel/Accommodations	18.9	21.6
Print Media	15.2	18.6
Family	18.4	17.4
Business/Conference/Meeting	17.6	15.6
Maps	8.3	10.4
Special Event	8.8	7.4
Travel Planning Window (2013)		
How Far in Advance Start Planning Trip	--	51.9 days
How Far in Advance Book Reservations for Trip	--	34.4 days
Satisfaction with Amelia Island		
Very Satisfied	78.9%	81.7%
Satisfied	<u>18.1</u>	<u>16.1</u>
Satisfaction Level (Very Satisfied + Satisfied)	<u>97.0%</u>	<u>97.8%</u>
Recommend Amelia Island to Friends/Relatives		
Yes	97.5%	96.3%
Plan to Return (% Yes)		
To Local Area	89.8%	91.4%
Demographics		
Average Age Head of Household (Years)	50.4	51.0
Median Annual Household Income	\$117,968	\$119,131
Seen/Read/Heard Amelia Island Information (% Yes)	42.7%	43.7%
Influenced by Amelia Island Information <i>(Base: Respondents Reporting Seen/Read/Heard Information)</i>	42.4%	51.8%
Amelia Island Base Budget		
Total	\$1,516.03	\$1,680.59
Per Person/Trip	606.41	646.38
Per Person/Day	151.60	157.65



Amelia Island Visitor Profile | Fourth Quarter 2013 (Oct. – Dec.)

	<u>Fourth Quarter 2012</u> <i>n = 552</i>	<u>Fourth Quarter 2013</u> <i>n = 570</i>
Used Internet to Get Travel Information for this Trip (% Yes)	86.4%	88.5%
Booked Travel for this Trip on the Internet (% Yes)	57.3%	61.0%
Activities Enjoyed in Area (Multiple Response)		
Dining Out	77.3%	75.7%
Beach	77.4	74.6
Historic Downtown	70.5	69.3
Relaxing	52.5	59.6
Shopping	53.3	56.8
Walking on the Beach	46.6	49.4
Sight-Seeing	36.5	40.5
Pool	19.7	25.5
Reading	19.6	24.4
State Parks	22.1	21.7
Shelling	19.3	21.5
Wildlife/Environment	17.3	18.7
Swimming	20.8	18.5
Visiting with Friends/Relatives	19.2	18.3
Antiquing	12.3	17.2
Bars/Nightlife	14.8	17.0
Art Galleries	14.4	16.0
Water Cruise	12.8	10.5
Exercising	11.1	9.4
Farmers Market	7.9	7.4
Fishing	9.8	7.3
Golfing	7.5	5.9



Attributes that Describe Amelia Island Well

	<u>Fourth Quarter 2012</u> <i>n = 552</i>	<u>Fourth Quarter 2013</u> <i>n = 570</i>
Clean Environment	86.6%	88.0%
Good Food & Restaurants	74.2	79.5
Safe Destination	74.6	77.9
Beautiful Beaches	77.4	76.0
Historic Downtown	67.5	70.2
Complete Relaxation	71.4	68.1
A Romantic Place	57.7	65.1
Upscale Accommodations	58.7	64.0
Family Friendly	51.9	55.1
Good Value for the Money	45.0	44.0
State Parks	29.0	31.0
Activities for All Ages	18.2	23.7
Art Galleries	16.2	19.2
Good Golfing	12.5	12.0
Good Fishing	13.5	9.9
Good Water Sports	10.3	9.5

Attributes that Describe Amelia Island (Top Five)

