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Amelia Island
Calendar Year 2014 Visitor Profile
(January – December)

Prepared for:

Amelia Island Tourist Development Council

Prepared by:

Research Data Services, Inc.

www.ResearchDataLLC.com

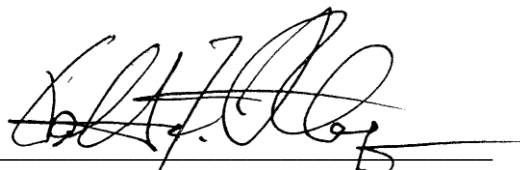
February 2015

Amelia Island: Calendar Year 2014 Visitor Profile

Certification

RESEARCH DATA SERVICES, INC. hereby certifies that, except as otherwise noted in this report:

1. We have no present or contemplated future interest in the project that is the subject of this study.
2. We have no personal interest or bias with respect to the subject matter of this report or the parties involved.
3. To the best of our knowledge and belief, the statements of fact contained in this report, upon which analyses, opinions, and conclusions expressed herein are based, are true and correct.
4. This report sets forth all of the limiting conditions (imposed by the terms of our assignment or by the undersigned) affecting the analyses, opinions, and conclusions contained in this report.
5. The underlying assumptions are based on present circumstances and information currently available.
6. Because circumstances may change and unanticipated events may occur subsequent to the date of this report, the reader must evaluate the assumptions and rationale of this report in light of the circumstances then prevailing. The terms of this engagement are such that we have no obligation to revise this report or the included projections to reflect events or conditions which occur subsequent to the completion of our fieldwork.



Walter J. Klages, Ph.D., President

February 26, 2015

Date

Amelia Island: Calendar Year 2014 Visitor Profile

Estimated Visitor Metrics

Visitor Statistics	<i>Quarter 1 (Jan. - Mar. '14)</i>	<i>Quarter 2 (Apr. - Jun. '14)</i>	<i>Quarter 3 (Jul. - Sep. '14)</i>	<i>Quarter 4 (Oct. - Dec. '14)</i>	Calendar Year 2013	Calendar Year 2014	% Δ 2013-2014
H/M/C/C Visitors (#)	137,300	153,400	160,700	123,000	519,400	574,400	+10.6%
Direct Expenditures (\$)	\$90,339,300	\$111,675,200	\$107,100,100	\$82,272,200	\$334,634,900	\$391,386,800	+17.0%
Total Economic Impact	\$118,859,400	\$146,931,000	\$140,911,600	\$108,245,500	\$440,279,200	\$514,947,500	+17.0%

Estimated Visitor Origins: Number of Visitors by Region

H/M/C/C Visitor Origins	<i>Quarter 1 (Jan. - Mar. '14)</i>	<i>Quarter 2 (Apr. - Jun. '14)</i>	<i>Quarter 3 (Jul. - Sep. '14)</i>	<i>Quarter 4 (Oct. - Dec. '14)</i>	Calendar Year 2013	Calendar Year 2014	% Δ 2013-2014
Florida	21,144	34,362	31,497	29,028	107,267	116,031	+8.2%
Southeast	48,055	65,655	80,831	46,494	213,508	241,035	+12.9%
Northeast	28,009	24,544	17,356	16,359	76,568	86,268	+12.7%
Midwest	25,126	15,954	20,891	19,434	78,597	81,405	+3.6%
Foreign	10,435	5,522	4,500	4,920	19,500	25,377	+30.1%
Markets of Opp.	4,531	7,363	5,625	6,765	23,960	24,284	+1.4%
Total	137,300	153,400	160,700	123,000	519,400	574,400	+10.6%

Amelia Island: Calendar Year 2014 Visitor Profile

Occupancy and ADR Data

	Quarter 1			Quarter 2			Quarter 3			Quarter 4			Calendar Year 2014	% Δ 2013-2014
	Jan '14	Feb. '14	Mar. '14	Apr. '14	May '14	Jun. '14	Jul. '14	Aug. '14	Sep. '14	Oct. '14	Nov. '14	Dec. '14		
Occ. (%)	54.8	63.7	74.1	78.4	79.4	78.7	83.2	69.9	65.3	67.9	58.8	48.2	68.6	+7.1%
ADR	\$152.86	\$161.73	\$241.78	\$237.92	\$229.29	\$226.15	\$226.60	\$198.11	\$176.96	\$200.35	\$174.42	\$163.88	\$203.67	+6.1%
RevPAR	\$83.75	\$102.99	\$179.23	\$186.60	\$182.16	\$177.92	\$188.63	\$138.57	\$115.53	\$136.07	\$102.57	\$79.05	\$139.65	+13.6%

Amelia Island: Calendar Year 2014 Visitor Profile

Visitor Profile

	Quarter 1 Jan. - Mar. '14	Quarter 2 Apr. - Jun. '14	Quarter 3 Jul. - Sep. '14	Quarter 4 Oct. - Dec. '14	Calendar Year 2014
Length of Stay (Days)					
In Amelia Island	4.1	4.8	4.5	4.1	4.4
Party Size					
Number of People	2.7	2.9	2.8	2.5	2.7
Party Composition (Multiple Response)					
Family	26.7	32.4	37.9	21.3	29.6
Couple	57.5	52.2	45.5	59.3	53.6
Single	7.0	4.7	7.5	10.2	7.4
Extended Family	7.4	8.8	4.0	8.2	7.1
Group of Friends	5.4	8.1	8.1	7.1	7.2
Have Children or Young Adults in Immediate Travel Party					
% Yes	22.8	29.7	36.1	18.7	26.8
Transportation (Percentaged to the Base of All Resp.)					
Personal Car/RV	69.5	69.9	78.0	70.7	72.0
Plane	27.6	28.1	20.0	27.5	25.8
Rental Car	19.5	21.8	15.2	23.4	20.0
Airport Deplaned (Base: Flew)					
Jacksonville Int'l	84.5	86.2	87.9	82.9	85.4
Orlando Int'l/Sanford	6.5	6.0	5.5	8.9	6.7
Purpose of Trip (Multiple Response)					
Vacation	56.2	70.0	62.1	48.8	59.3
A Getaway	31.3	16.2	19.9	25.5	23.2
Business/Meeting/Conference	14.9	11.7	18.5	16.6	15.4
Friends/Relatives	12.8	12.5	6.4	11.7	10.9
Wedding/Honeymoon	5.0	4.5	5.1	6.6	5.3
Special Event/Festival	8.4	7.0	4.3	6.9	6.7

Amelia Island: Calendar Year 2014 Visitor Profile

	Quarter 1 Jan. - Mar. '14	Quarter 2 Apr. - Jun. '14	Quarter 3 Jul. - Sep. '14	Quarter 4 Oct. - Dec. '14	Calendar Year 2014
First Visit to (% yes)					
Amelia Island	63.9	55.0	47.7	55.6	55.6
Florida	6.7	8.0	5.2	8.7	7.2
Other Areas in FL Considered for Trip (Open Ended Multiple Response)					
None, Only Amelia Island	45.7	45.0	51.1	50.9	48.2
St. Augustine/Ponte Vedra	18.4	21.6	19.4	20.8	20.1
Savannah	13.3	15.6	14.0	13.8	14.2
Orlando	12.8	8.1	7.0	7.4	8.8
Hilton Head	9.9	9.3	13.8	10.4	10.9
Jacksonville	14.3	11.1	10.5	9.4	11.3
Jekyll Island	10.7	7.3	11.6	5.3	8.7
Why Chose Amelia Island (Multiple Response)					
Beach	36.7	53.6	52.1	42.9	46.3
Previous Experience	15.8	14.6	24.2	13.9	17.1
Love/Like the Area	21.6	23.6	21.3	12.3	19.7
Never Been/Try Something New	26.9	35.4	25.6	30.4	29.6
Hotel/Accommodations	13.7	30.9	27.0	26.5	24.5
Recommendation	18.5	26.2	21.6	21.3	21.9
Convenient Location	23.5	21.2	14.6	15.4	18.7
Appealing Brochures/Websites	29.4	22.8	22.6	28.2	25.8
Nature/Environment	16.0	25.6	19.2	19.4	20.1
Family Oriented Area	15.7	19.1	20.3	9.0	16.0
Business/Meeting	15.2	13.3	12.8	16.9	14.6
Visiting with Friends/Family	13.1	12.3	11.5	15.7	13.2
History	20.0	21.9	12.1	8.6	15.7
Weather	22.0	18.7	16.8	22.6	20.0
Event	N/A	9.8	7.4	7.1	8.1
Attractions	15.2	19.5	9.8	7.7	13.1

Amelia Island: Calendar Year 2014 Visitor Profile

	Quarter 1 Jan. - Mar. '14	Quarter 2 Apr. - Jun. '14	Quarter 3 Jul. - Sep. '14	Quarter 4 Oct. - Dec. '14	Calendar Year 2014
Information Most Helpful to Visit					
<i>(Open Ended Multiple Response)</i>					
Internet	76.0	83.3	78.1	70.8	77.1
Previous Visit	28.5	32.2	32.8	27.4	30.2
Recommendation	25.1	34.7	34.2	27.9	30.5
Family	10.2	9.0	17.4	15.0	12.9
Hotel/Accommodations	24.4	24.3	26.9	23.4	24.8
Print Media	22.1	20.1	10.7	18.4	17.8
Business/Conference/Meeting	13.8	9.3	11.4	17.1	12.9
Maps	12.1	10.8	15.1	9.6	11.9
Special Event	8.9	12.6	6.9	7.1	8.9
Satisfaction with Amelia Island					
Very Satisfied	78.4	83.8	86.9	84.2	83.3
Satisfied	19.2	15.1	10.9	14.1	14.8
Satisfaction Level <i>(Very Satisfied + Satisfied)</i>	97.6	98.9	97.8	98.3	98.2
Recommend Amelia Island to Friends/Relatives					
% Yes	94.5	98.2	97.4	95.9	96.5
Plan to Return <i>(% yes)</i>					
To Local Area	85.2	86.1	93.4	88.5	88.3
Demographics					
Average Age Head of HH (yrs)	50.3	49.5	48.8	52.8	50.4
Median Annual HH Income	\$122,910	\$117,370	\$132,143	\$122,730	\$123,788
Seen/Read/Heard Amelia Island Message					
% Yes	42.9	39.4	44.7	42.3	42.3
Influenced by Amelia Island Message					
<i>(Base: Seen/Read/Heard Area Message)</i>					
% Yes	46.0	56.2	47.6	53.9	50.9

Amelia Island: Calendar Year 2014 Visitor Profile

	Quarter 1 Jan. - Mar. '14	Quarter 2 Apr. - Jun. '14	Quarter 3 Jul. - Sep. '14	Quarter 4 Oct. - Dec. '14	Calendar Year 2014
Avg. Party Budget Breakdown					
Accommodations	\$695	\$965	\$838	\$735	\$808
Restaurant Food/Beverage	\$423	\$445	\$456	\$393	\$429
Grocery Store	\$76	\$78	\$82	\$66	\$76
Admissions to Attractions	\$69	\$64	\$59	\$60	\$63
Other Entertainment	\$73	\$86	\$90	\$109	\$89
Retail Purchases	\$165	\$210	\$198	\$153	\$182
Miscellaneous	\$275	\$263	\$143	\$156	\$209
Average Party Budget Breakdown					
Total	\$1,777	\$2,111	\$1,866	\$1,672	\$1,856
Per Person/Trip	\$658	\$728	\$666	\$669	\$680
Per Person/Day	\$160	\$152	\$148	\$163	\$156
Use Internet to Obtain Travel Information					
% Yes	91.6	92.3	92.2	90.8	91.7
Book Travel Reservations For Trip Online					
<i>(Base: Resp. who Obtain Travel Info. Online)</i>					
% Yes	63.0	66.4	64.9	59.2	63.4

Amelia Island: Calendar Year 2014 Visitor Profile

	Quarter 1 Jan. - Mar. '14	Quarter 2 Apr. - Jun. '14	Quarter 3 Jul. - Sep. '14	Quarter 4 Oct. - Dec. '14	Calendar Year 2014
Activities Enjoyed in Area					
<i>(Open Ended Multiple Response)</i>					
Beach	61.6	84.0	82.1	74.3	75.5
Dining Out	83.3	83.2	75.6	76.5	79.7
Historic Downtown	78.7	89.3	61.1	74.9	76.0
Walking on the Beach	55.9	69.0	64.5	51.7	60.3
Relaxing	60.2	70.3	70.1	60.0	65.2
Shopping	53.3	59.1	61.2	56.7	57.6
Sight-Seeing	36.6	50.2	35.8	39.4	40.5
Pool	16.3	43.2	36.4	23.9	30.0
Shelling	24.3	36.4	34.2	19.8	28.7
Reading	30.4	35.8	29.5	27.2	30.7
Swimming	13.3	39.1	28.3	16.5	24.3
State Parks	41.7	34.6	28.7	26.1	32.8
Wildlife/Environment	24.6	26.2	21.8	17.8	22.6
Visiting with Friends/Relatives	20.0	10.0	15.0	17.3	15.6
Bars/Nightlife	15.0	19.4	18.4	13.4	16.6
Art Galleries	17.9	15.5	13.4	16.3	15.8
Antiquing	17.3	21.6	19.7	15.7	18.6
Exercising	17.1	14.5	12.3	13.3	14.3
Golfing	11.6	9.1	9.3	5.2	8.8
Water Cruise	11.8	12.7	9.2	12.9	11.7
Fishing	7.0	5.7	7.4	8.2	7.1
Farmers Market	14.5	8.2	11.0	9.9	10.9

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	Quarter 1 Jan. - Mar. '14	Quarter 2 Apr. - Jun. '14	Quarter 3 Jul. - Sep. '14	Quarter 4 Oct. - Dec. '14	Calendar Year 2014
Amelia Island Attributes					
Clean Environment	73.1	73.9	89.1	84.1	80.1
Beautiful Beaches	71.9	82.4	84.0	74.5	78.2
Safe Destination	74.4	66.7	83.4	75.2	74.9
Family Friendly	56.7	64.9	76.3	52.5	62.6
Complete Relaxation	55.3	61.3	75.0	66.0	64.4
Good Food & Restaurants	72.4	70.3	76.0	75.9	73.7
Historic Downtown	75.3	75.9	67.8	73.2	73.1
Upscale Accommodations	60.3	54.3	75.1	61.0	62.7
Good Value for the Money	36.6	49.0	61.3	42.5	47.4
A Romantic Place	52.3	51.9	58.0	59.5	55.4
Activities for All Ages	20.3	24.3	49.2	24.7	29.6
State Parks	43.3	36.1	35.8	32.4	36.9
Good Golfing	12.4	11.9	16.0	10.7	12.8
Good Water Sports	7.6	10.9	8.7	8.0	8.8
Good Fishing	10.8	9.2	9.8	12.5	10.6
Art Galleries	6.7	10.2	14.1	15.1	11.5