

RESEARCH DATA SERVICES, INC.

777 SOUTH HARBOUR ISLAND BOULEVARD • SUITE 260
TAMPA, FLORIDA 33602
TEL (813) 254-2975 • FAX (813) 223-2986

Amelia Island Visitor Profile
Fiscal Year 2013/2014
(October 2013 – September 2014)



Prepared for:

Amelia Island Tourist Development Council

Prepared by:

Research Data Services, Inc.

www.ResearchDataLLC.com


November 2014

Amelia Island: *Fiscal Year 2013/2014 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

November 25, 2014

Date

Amelia Island Visitor Profile: Fiscal Year 2013/2014

Estimated Visitor Metrics

Visitor Statistics	FY Quarter 1 (Oct. - Dec. '13)	FY Quarter 2 (Jan. - Mar. '14)	FY Quarter 3 (Apr. - Jun. '14)	FY Quarter 4 (Jul. - Sep. '14)	Fiscal Year 2012/2013	Fiscal Year 2013/2014	% Δ FY 2013- 2014
H/M/C/C Visitors (#)	115,200	137,300	153,400	160,700	504,300	566,600	+12.4%
Direct Expenditures (\$)	\$74,463,000	\$90,339,300	\$111,675,200	\$107,100,100	\$320,873,500	\$383,577,600	+19.5%
Total Economic Impact	\$97,971,000	\$118,859,400	\$146,931,000	\$140,911,600	\$422,173,300	\$504,673,000	+19.5%

Estimated Visitor Origins: Number of Visitors by Region

H/M/C/C Visitor Origins	FY Quarter 1 (Oct. - Dec. '13)		FY Quarter 2 (Jan. - Mar. '14)		FY Quarter 3 (Apr. - Jun. '14)		FY Quarter 4 (Jul. - Sep. '14)		Fiscal Year 2012/2013 # of Visitors	Fiscal Year 2013/2014 # of Visitors	% Δ FY 2013- 2014
	Rel %	# of Vis.	Rel %	# of Vis.	Rel %	# of Vis.	Rel %	# of Vis.			
Florida		25,574		21,144		34,362		31,497	105,317	112,577	+6.9%
Southeast		46,080		48,055		65,655		80,831	206,967	240,621	+16.3%
Northeast		14,285		28,009		24,544		17,356	74,295	84,194	+13.3%
Midwest		19,123		25,126		15,954		20,891	75,790	81,094	+7.0%
Foreign		3,456		10,435		5,522		4,500	18,847	23,913	+26.9%
Markets of Opp.		6,682		4,531		7,363		5,625	23,084	24,201	+4.8%
Total		115,200		137,300		153,400		160,700	504,300	566,600	+12.4%

Amelia Island Visitor Profile: Fiscal Year 2013/2014

Occupancy and ADR Data

	FY Quarter 1			FY Quarter 2			FY Quarter 3			FY Quarter 4			Fiscal Year 2013/2014	% Δ FY 2013- 2014
	Oct. '13	Nov. '13	Dec. '13	Jan '14	Feb. '14	Mar. '14	Apr. '14	May '14	Jun. '14	Jul. '14	Aug. '14	Sep. '14		
Occ. (%)	62.7	55.2	41.8	54.8	63.7	74.1	78.4	79.4	78.7	83.2	69.9	65.3	67.3	+7.5%
ADR	\$181.64	\$175.48	\$150.33	\$152.86	\$161.73	\$241.78	\$237.92	\$229.29	\$226.15	\$226.60	\$198.11	\$176.96	\$196.57	+6.9%
RevPAR	\$113.87	\$96.87	\$62.81	\$83.75	\$102.99	\$179.23	\$186.60	\$182.16	\$177.92	\$188.63	\$138.57	\$115.53	\$135.74	+15.1%

Amelia Island Visitor Profile: Fiscal Year 2013/2014

Visitor Profile

	FY Quarter 1 Oct. - Dec. '13	FY Quarter 2 Jan. - Mar. '14	FY Quarter 3 Apr. - Jun. '14	FY Quarter 4 Jul. - Sep. '14	Fiscal Year 2013/2014
Length of Stay (Days)					
In Amelia Island	4.1	4.1	4.8	4.5	4.4
Party Size					
Number of People	2.6	2.7	2.9	2.8	2.8
Party Composition (Multiple Response)					
Family	23.0	26.7	32.4	37.9	30.0
Couple	56.5	57.5	52.2	45.5	52.9
Single	9.7	7.0	4.7	7.5	7.2
Extended Family	5.6	7.4	8.8	4.0	6.5
Group of Friends	6.8	5.4	8.1	8.1	7.1
Have Children or Young Adults in Immediate Travel Party					
% Yes	20.2	22.8	29.7	36.1	27.2
Transportation (Percentaged to the Base of All Resp.)					
Personal Car/RV	67.4	69.5	69.9	78.0	71.2
Plane	25.6	27.6	28.1	20.0	25.3
Rental Car	23.6	19.5	21.8	15.2	20.0
Airport Deplaned (Base: Flew)					
Jacksonville Int'l	87.6	84.5	86.2	87.9	86.6
Orlando Int'l/Sanford	6.7	6.5	6.0	5.5	6.2
Purpose of Trip (Multiple Response)					
Vacation	47.4	56.2	70.0	62.1	58.9
A Getaway	31.8	31.3	16.2	19.9	24.8
Business/Meeting/Conference	15.0	14.9	11.7	18.5	15.0
Friends/Relatives	15.6	12.8	12.5	6.4	11.8
Wedding	8.3	5.0	4.5	5.1	5.7
Special Event/Festival	5.8	8.4	7.0	4.3	6.4

Amelia Island Visitor Profile: Fiscal Year 2013/2014

	FY Quarter 1 <i>Oct. - Dec. '13</i>	FY Quarter 2 <i>Jan. - Mar. '14</i>	FY Quarter 3 <i>Apr. - Jun. '14</i>	FY Quarter 4 <i>Jul. - Sep. '14</i>	Fiscal Year 2013/2014
First Visit to (% yes)					
Amelia Island	53.8	63.9	55.0	47.7	55.1
Florida	11.6	6.7	8.0	5.2	7.9
Other Areas in FL Considered for Trip <i>(Open Ended Multiple Response)</i>					
None, Only Amelia Island	58.3	45.7	45.0	51.1	50.0
St. Augustine/Ponte Vedra	18.5	18.4	21.6	19.4	19.5
Savannah	9.4	13.3	15.6	14.0	13.1
Orlando	6.8	12.8	8.1	7.0	8.7
Hilton Head	7.4	9.9	9.3	13.8	10.1
Jacksonville	11.1	14.3	11.1	10.5	11.8
Jekyll Island	3.7	10.7	7.3	11.6	8.3
Why Chose Amelia Island <i>(Multiple Response)</i>					
Beach	46.7	36.7	53.6	52.1	47.3
Previous Experience	16.9	15.8	14.6	24.2	17.9
Love/Like the Area	15.5	21.6	23.6	21.3	20.5
Never Been/Try Something New	28.7	26.9	35.4	25.6	29.2
Hotel/Accommodations	27.1	13.7	30.9	27.0	24.7
Recommendation	24.4	18.5	26.2	21.6	22.7
Convenient Location	13.4	23.5	21.2	14.6	18.2
Appealing Brochures/Websites	24.5	29.4	22.8	22.6	24.8
Nature/Environment	21.2	16.0	25.6	19.2	20.5
Family Oriented Area	10.7	15.7	19.1	20.3	16.5
Business/Meeting	15.6	15.2	13.3	12.8	14.2
Visiting with Friends/Family	18.5	13.1	12.3	11.5	13.9
History	9.5	20.0	21.9	12.1	15.9
Weather	25.8	22.0	18.7	16.8	20.8
Event	6.0	N/A	9.8	7.4	7.7
Attractions	8.8	15.2	19.5	9.8	13.3

Amelia Island Visitor Profile: Fiscal Year 2013/2014

	FY Quarter 1 <i>Oct. - Dec. '13</i>	FY Quarter 2 <i>Jan. - Mar. '14</i>	FY Quarter 3 <i>Apr. - Jun. '14</i>	FY Quarter 4 <i>Jul. - Sep. '14</i>	Fiscal Year 2013/2014
Information Most Helpful to Visit <i>(Open Ended Multiple Response)</i>					
Internet	73.8	76.0	83.3	78.1	77.8
Previous Visit	28.8	28.5	32.2	32.8	30.6
Recommendation	30.3	25.1	34.7	34.2	31.1
Family	17.4	10.2	9.0	17.4	13.5
Hotel/Accommodations	21.6	24.4	24.3	26.9	24.3
Print Media	18.6	22.1	20.1	10.7	17.9
Business/Conference/Meeting	15.6	13.8	9.3	11.4	12.5
Maps	10.4	12.1	10.8	15.1	12.1
Special Event	7.4	8.9	12.6	6.9	9.0
Satisfaction with Amelia Island					
Very Satisfied	81.7	78.4	83.8	86.9	82.7
Satisfied	16.1	19.2	15.1	10.9	15.3
Satisfaction Level <i>(Very Satisfied + Satisfied)</i>	97.8	97.6	98.9	97.8	98.0
Recommend Amelia Island to Friends/Relatives					
% Yes	96.3	94.5	98.2	97.4	96.6
Plan to Return <i>(% yes)</i>					
To Local Area	91.4	85.2	86.1	93.4	89.0
Demographics					
Average Age Head of HH (yrs)	51.0	50.3	49.5	48.8	49.9
Median Annual HH Income	\$119,131	\$122,910	\$117,370	\$132,143	\$122,889
Seen/Read/Heard Amelia Island Message					
% Yes	43.7	42.9	39.4	44.7	42.7
Influenced by Amelia Island Message <i>(Base: Seen/Read/Heard Area Message)</i>					
% Yes	51.8	46.0	56.2	47.6	50.4

Amelia Island Visitor Profile: Fiscal Year 2013/2014

	FY Quarter 1 <i>Oct. - Dec. '13</i>	FY Quarter 2 <i>Jan. - Mar. '14</i>	FY Quarter 3 <i>Apr. - Jun. '14</i>	FY Quarter 4 <i>Jul. - Sep. '14</i>	Fiscal Year 2013/2014
Average Party Budget Breakdown					
Total	\$1,681	\$1,777	\$2,111	\$1,866	\$1,859
Per Person/Trip	\$646	\$658	\$728	\$666	\$675
Per Person/Day	\$158	\$160	\$152	\$148	\$155
Use Internet to Obtain Travel Information					
% Yes	88.5	91.6	92.3	92.2	91.2
Book Travel Reservations For Trip Online					
<i>(Base: Resp. who Obtain Travel Info. Online)</i>					
% Yes	61.0	63.0	66.4	64.9	63.8
Activities Enjoyed in Area					
<i>(Open Ended Multiple Response)</i>					
Beach	74.6	61.6	84.0	82.1	75.6
Dining Out	75.7	83.3	83.2	75.6	79.5
Historic Downtown	69.3	78.7	89.3	61.1	74.6
Walking on the Beach	49.4	55.9	69.0	64.5	59.7
Relaxing	59.6	60.2	70.3	70.1	65.1
Shopping	56.8	53.3	59.1	61.2	57.6
Sight-Seeing	40.5	36.6	50.2	35.8	40.8
Pool	25.5	16.3	43.2	36.4	30.4
Shelling	21.5	24.3	36.4	34.2	29.1
Reading	24.4	30.4	35.8	29.5	30.0
Swimming	18.5	13.3	39.1	28.3	24.8
State Parks	21.7	41.7	34.6	28.7	31.7
Wildlife/Environment	18.7	24.6	26.2	21.8	22.8
Visiting with Friends/Relatives	18.3	20.0	10.0	15.0	15.8
Bars/Nightlife	17.0	15.0	19.4	18.4	17.5
Art Galleries	16.0	17.9	15.5	13.4	15.7
Antiquing	17.2	17.3	21.6	19.7	19.0
Exercising	9.4	17.1	14.5	12.3	13.3
Golfing	5.9	11.6	9.1	9.3	9.0
Water Cruise	10.5	11.8	12.7	9.2	11.1
Fishing	7.3	7.0	5.7	7.4	6.9
Farmers Market	7.4	14.5	8.2	11.0	10.3

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<i>Amelia Island Attributes</i>					
Clean Environment	88.0	73.1	73.9	89.1	81.0
Beautiful Beaches	76.0	71.9	82.4	84.0	78.6
Safe Destination	77.9	74.4	66.7	83.4	75.6
Family Friendly	55.1	56.7	64.9	76.3	63.3
Complete Relaxation	68.1	55.3	61.3	75.0	64.9
Good Food & Restaurants	79.5	72.4	70.3	76.0	74.6
Historic Downtown	70.2	75.3	75.9	67.8	72.3
Upscale Accommodations	64.0	60.3	54.3	75.1	63.4
Good Value for the Money	44.0	36.6	49.0	61.3	47.7
A Romantic Place	65.1	52.3	51.9	58.0	56.8
Activities for All Ages	23.7	20.3	24.3	49.2	29.4
State Parks	31.0	43.3	36.1	35.8	36.6
Good Golfing	12.0	12.4	11.9	16.0	13.1
Good Water Sports	9.5	7.6	10.9	8.7	9.2
Good Fishing	9.9	10.8	9.2	9.8	9.9
Art Galleries	19.2	6.7	10.2	14.1	12.6