

VISIT SOUTH WALTON

Visitor Tracking Study

Winter 2020

(December 2019 to February 2020)



TABLE OF CONTENTS

Study objectives & methodology 3

Executive summary 5

Visitor's journey 6

Economic impact 7

Pre-visit 10

Travel party profile 18

Trip experience 26

Post trip evaluation 32

Yearly comparisons 37

Detailed findings 42

Pre-visit 43

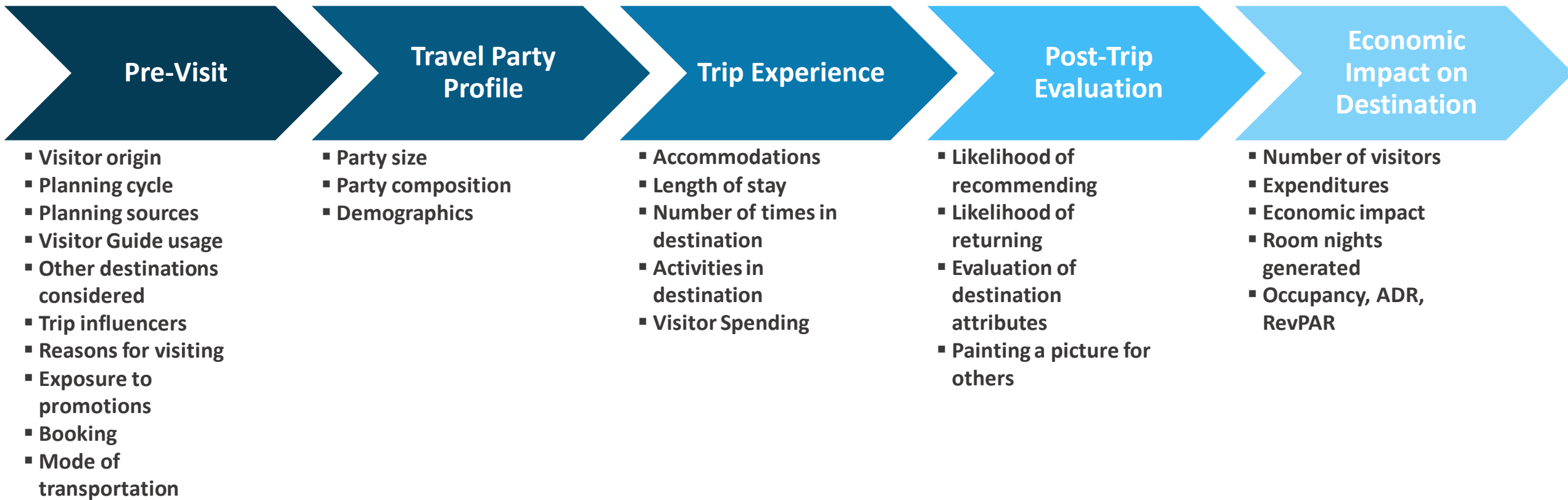
Travel party profile 53

Trip experience 60

Post trip evaluation 66



STUDY OBJECTIVES: MAP THE VISITOR JOURNEY



Visitor Tracking Study

This report is based on 436 internet and in-person surveys with Winter visitors who traveled to South Walton between December 2019 and February 2020.

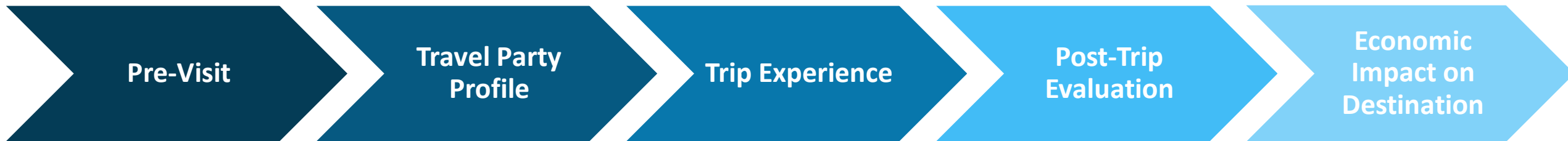
*Interviews are with out-of-county guests who stay at properties/vacation rentals at beach communities across South Walton, and at various locations along the beaches. 127 interviews were conducted via face-to-face interviews along the beach and in public areas.

EXECUTIVE SUMMARY



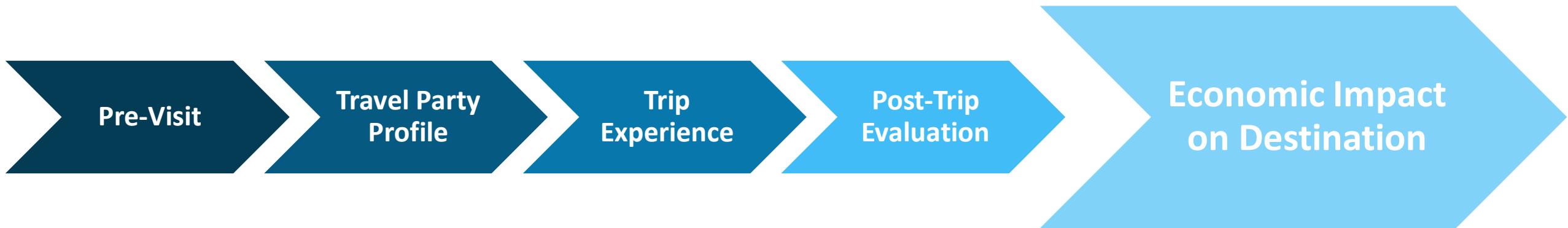
VISITOR JOURNEY: ECONOMIC IMPACT

This report is organized along the visitor's journey as shown below.



VISITOR JOURNEY: ECONOMIC IMPACT

We start at the end, that is, the economic impact of the visitor's journey.



ECONOMIC IMPACT – WINTER 2019 VS. 2020

There were modest increases in room nights and visitors in paid accommodations based on a 5% increase in active units from Winter 2019 to Winter 2020 countered by a 4.1% decrease in occupancy.

Direct spending was up 3.6% as per person spending increased based, in part, on a rise in ADR of 5.5%.

TDT increased 21.3% based primarily on the additional 1% tax that started January 1, 2020. Without the tax increase, TDT was up 5.5%.

Property Statistics	Winter 2019	Winter 2020	% Change
Room nights	505,280	514,710	+1.9%
Total visitors	383,250	388,630	+1.4%
TDT collections	\$1,996,365	\$2,421,872	+21.3%
Direct spending	\$560,087,400	\$580,464,500	+3.6%
Economic impact	\$828,923,800	\$859,087,500	+3.6%
Occupancy	41.9%	40.2%	-4.1%
Room rates	\$150.12	\$158.43	+5.5%
RevPAR	\$62.90	\$63.69	+1.3%

Data sources: Walton County government, properties in South Walton that rent to visitors, Key Data, and visitor surveys by Downs & St. Germain Research.

ECONOMIC IMPACT - LODGING STATISTICS

40.2%

Occupancy

↓ 4.1%

\$158.43

ADR

↑ 5.5%

\$63.69

RevPAR

↑ 1.3%

VISITOR JOURNEY: PRE-VISIT



PLANNING CYCLE

- » Nearly **5 in 10** visitors plan a Winter South Walton vacation at least 4 months in advance
- » **11%** of South Walton vacations are impulse decisions (plan two weeks or less in advance)
- » **12%** considered vacationing at a beach outside of South Walton - most of those beaches are in Florida



TRIP PLANNING SOURCES*



Friends, family

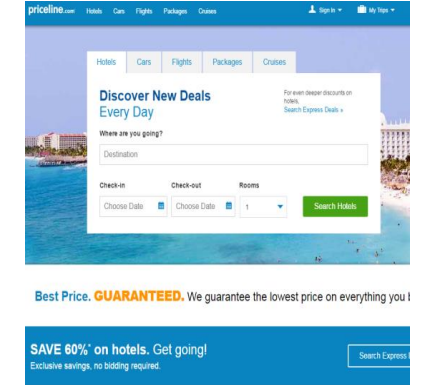
Search engines



Website for 1 of the 16 beach neighborhoods



Online Travel Agency



Online Travel Reviews



*Multiple responses permitted.

SOUTH WALTON VISITOR GUIDE

- » **18%** of visitors viewed (mostly online) the South Walton Visitors Guide before going to South Walton
- » Visitors Guide received a rating of **7.7 out of 10¹**



¹10 = Extremely useful; 1 = Not at all useful

TOP REASONS FOR VISIT*

Relax and unwind
(**54%**)



Family vacation
(**38%**)



Annual routine
(**28%**)



Special occasion
(**12%**)



*Multiple responses permitted

Sources of Promotions

- » **28%** of visitors have recently noticed promotions about South Walton

Television



Magazine Ad



Magazine Article



South Walton Social Media



TOP BOOKING SOURCES

Vacation Rental Company
(48%)

ROSEMARY
BEACH
COTTAGE RENTAL COMPANY



NEWMAN-DAILEY
RESORT PROPERTIES, INC.

Hotel/condo
(32%)

Residence
Inn[®]
Marriott[®]

 Sandestin[®]
Golf and Beach Resort


hotel • dining • spa

VRBO, Homeaway
(9%)

 HomeAway[®]

 VRBO[®]
from HomeAway[®]

VacationRentals.com[™]
Part of the HomeAway Family

VISITOR TRANSPORTATION

- » **85%** of visitors drove to South Walton
- » **15%** who flew used the following airports:

49%

Northwest Florida Beaches
International Airport



37%

Destin-Ft. Walton Beach
Airport



8%

Pensacola International
Airport

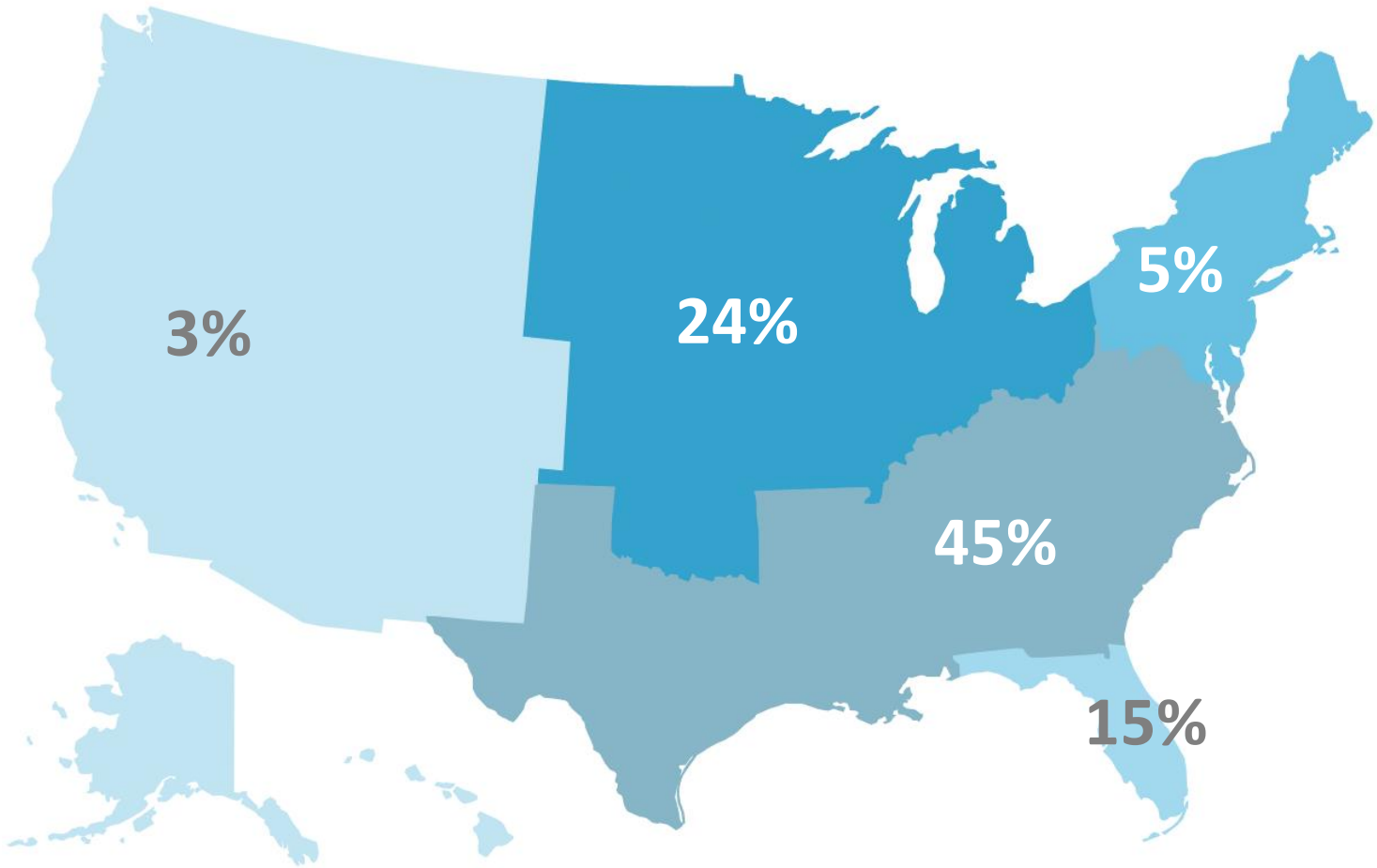


VISITOR JOURNEY: TRAVEL PARTY PROFILE



ORIGIN OF WINTER VISITORS

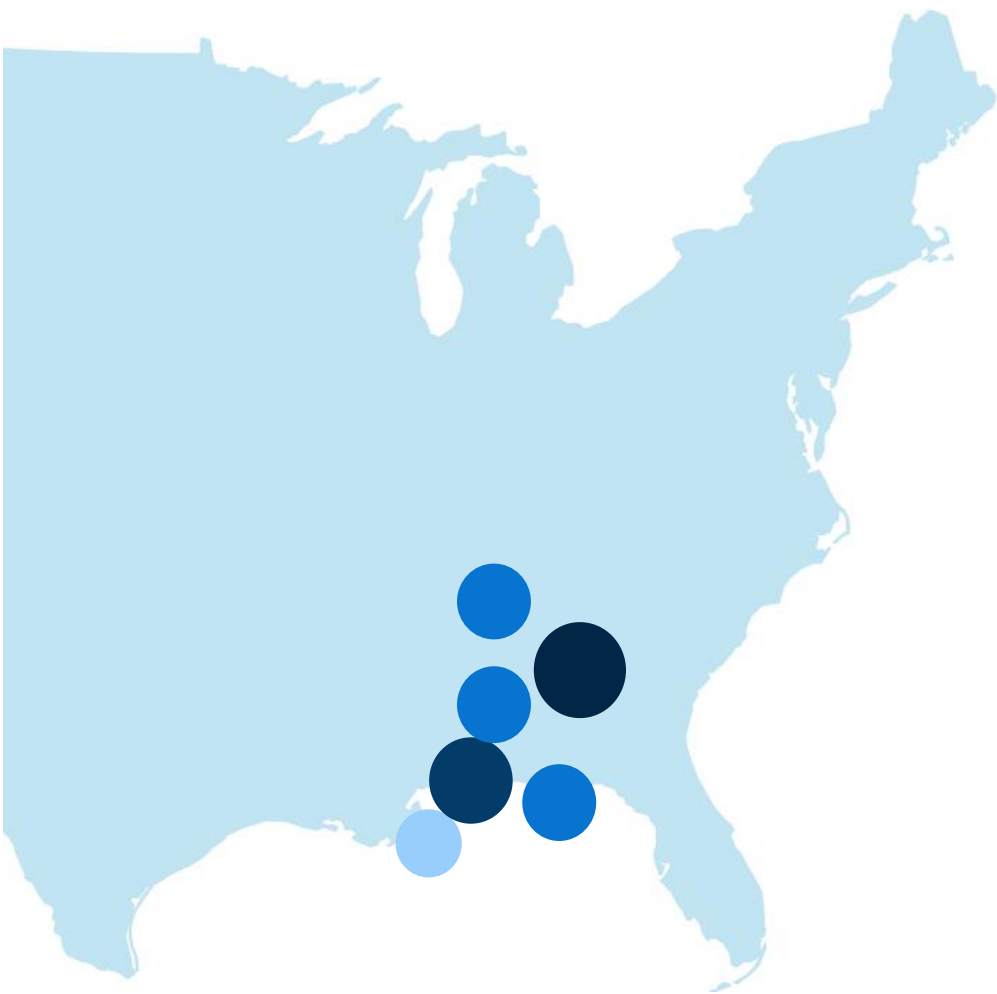
3 in 5 visitors are from the southeast.



8% of visitors were from Canada

ORIGIN OF WINTER VISITORS

35% of visitors are from 6 markets.



- 11% ● Atlanta
- 9% ● Pensacola-Mobile
- 4% ● Nashville
- 4% ● Panama City-Destin
- 4% ● Birmingham
- 3% ● New Orleans

TRAVEL PARTY SIZE AND COMPOSITION

The typical visitor traveled in a party composed of **3.4** people



25% traveled with at least one person under the age of 20 in their travel party



Winter VISITOR PROFILE



- » The typical South Walton Winter visitor:
 - » **58** years old
 - » Female (**56%**)
 - » Median household income of **\$152,600**
 - » From the Southeast (**60%**)

VISITOR PROFILE: TYPICAL VACATIONER¹



→The typical Vacationer¹ Visitor:

- Is **53** years old
- Has a median household income of **\$158,300**
- Is female (**57%**)
- 34%** travel with children
- 80%** drive to the area
- Is from the Southeast (**66%**)

¹Travel parties who stayed 1-10 nights.

VISITOR PROFILE: TYPICAL LONG-TERM¹ VISITOR

→The typical Long-Term¹ Visitor:

- Is **72** years old
- Has a median household income of **\$128,600**
- Is male (**53%**)
- 5%** travel with children
- 93%** drive to the area
- Is from the Midwest (**55%**)

¹Travel parties who stayed more than 10 nights.

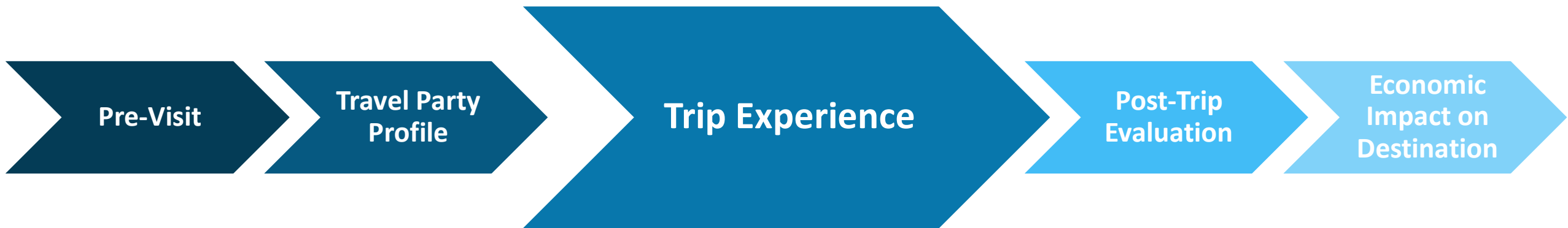
VISITOR PROFILE: TYPICAL DAY TRIPPER

» The typical Day Trip Visitor:

- » Is **53** years old
- » Has a median household income of **\$122,600**
- » Is female (**71%**)
- » **11%** travel with with children
- » **92%** drive to the area
- » Is from Florida (**59%**)



VISITOR JOURNEY: TRIP EXPERIENCE



ACCOMMODATIONS

71% Condos, rental houses, etc.



15% Hotels



8% Personal home/condo



TOP VISITOR ACTIVITIES*

Restaurants (**88%**)



Beach (**80%**)



Relax and unwind (**79%**)



Shopping, antiques (**70%**)



Family time, reading,
cooking (**60%**)



*Multiple responses permitted.

LENGTH OF STAY

- » Visitors spent **7.6*** nights in South Walton



*Visitors who stayed 30 or fewer nights.

FIRST-TIME AND EXPERIENCED VISITORS

- » **16%** were first-time visitors
- » **39%** had visited more than 10 times



VISITOR EXPENDITURES*

- » Visitors spent **\$689** a day
- » Visitors spent **\$5,236** on their trip



*Visitors staying in paid accommodations.

VISITOR JOURNEY: POST TRIP EVALUATION



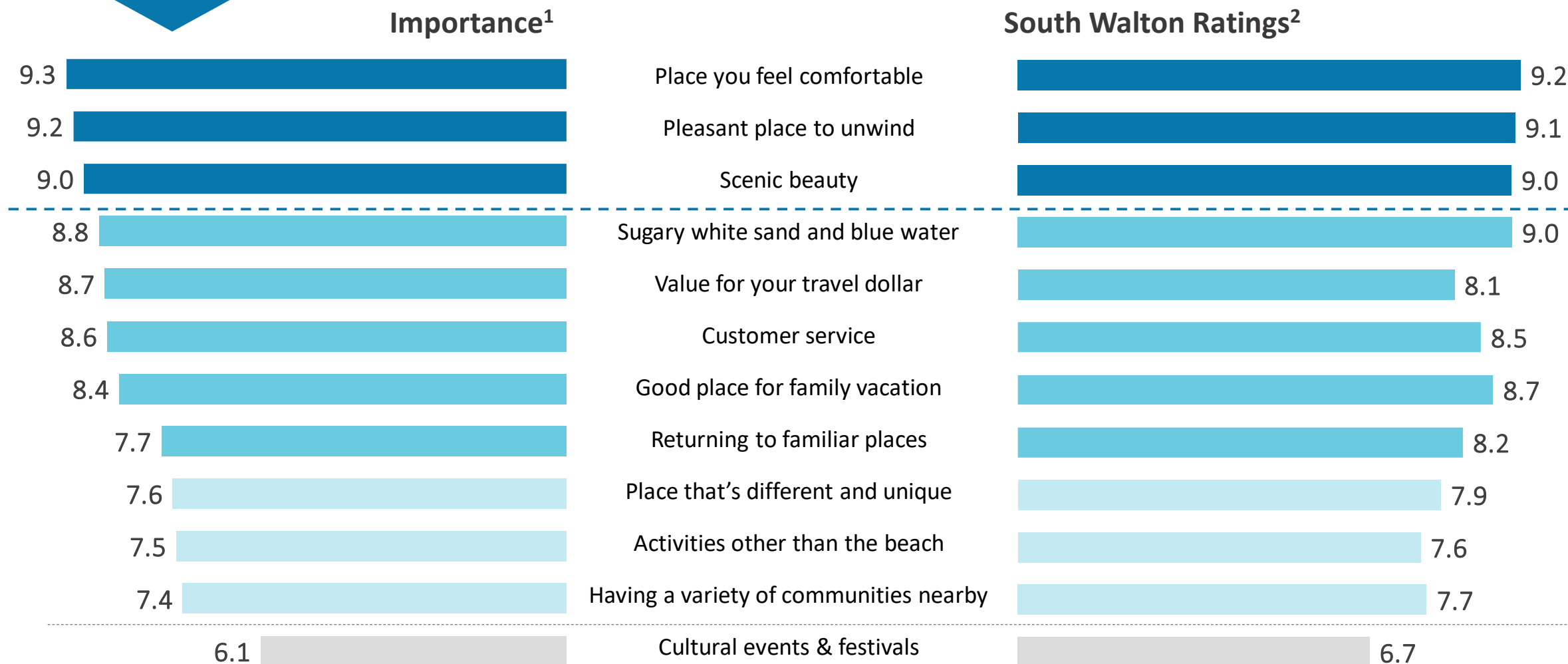
VISITOR SATISFACTION

- » Visitors gave South Walton a rating of **9.0¹** as a place to vacation
- » **94%** will return to South Walton²



¹10 = Excellent; 1 = Poor

VACATION ATTRIBUTE IMPORTANCE VS. RATINGS



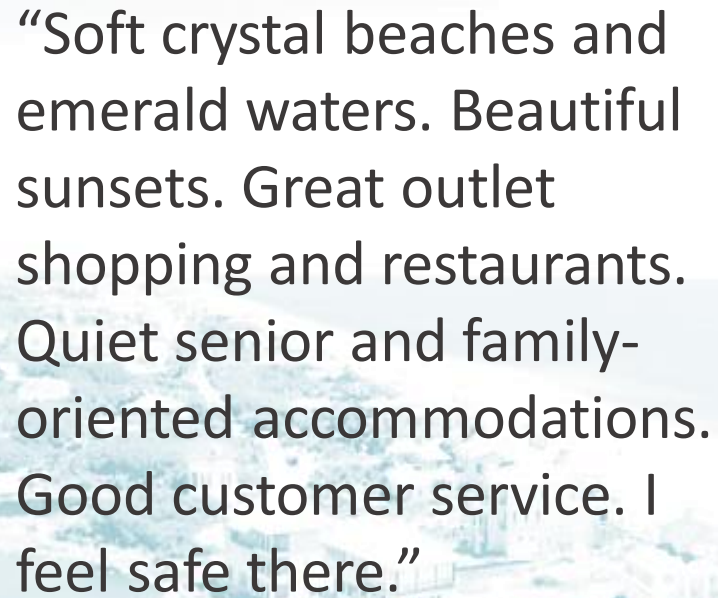
¹Rated on a scale from 1 to 10 where 10 is very important and 1 is not at all important.

²Rated on a scale from 1 to 10 where 10 is excellent and 1 is poor.

VISITOR DESCRIPTIONS OF SOUTH WALTON

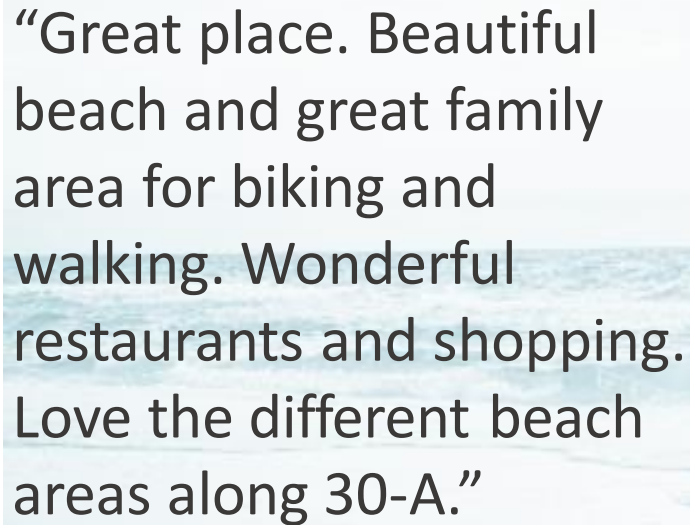
Beautiful white sand, clear water (65%)

“Soft crystal beaches and emerald waters. Beautiful sunsets. Great outlet shopping and restaurants. Quiet senior and family-oriented accommodations. Good customer service. I feel safe there.”



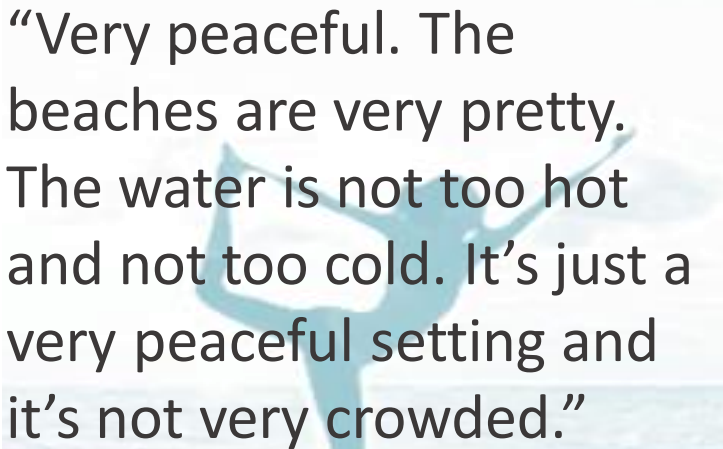
Great place to visit (39%)

“Great place. Beautiful beach and great family area for biking and walking. Wonderful restaurants and shopping. Love the different beach areas along 30-A.”



Relaxing & stress free (28%)

“Very peaceful. The beaches are very pretty. The water is not too hot and not too cold. It’s just a very peaceful setting and it’s not very crowded.”



EMOTIONS ASSOCIATED WITH SOUTH WALTON*



*Word cloud generated from verbatim responses

YEARLY COMPARISONS

VISITOR PROFILE – Winter 2019 VS. 2020

Visitor Metrics ¹	Winter 2019	Winter 2020
Travel party	3.4	3.4
Kids <20	26%	25%
Median age	56	58
Estimated median household income	\$154,700	\$152,600
Stayed in condo/rental house	67%	69%
Drove	76%	85%
Nights spent	7.6	7.6
Direct expenditures (travel party for entire trip)	\$4,902	\$5,219
1 st time visitor	17%	16%
10+ visits to South Walton	39%	39%

¹ Visitors who stayed in paid accommodations for up to 30 nights.

VISITOR PROFILE – Winter 2019 VS. 2020

Top Origin States	Winter 2019	Winter 2020
Florida	12%	15%
Georgia	10%	14%
Alabama	13%	11%
Canada	7%	8%
Tennessee	11%	7%
Michigan	3%	5%
Origins - Regions	Winter 2019	Winter 2020
Southeast	59%	60%
Northeast	4%	5%
Midwest	25%	24%
West	4%	3%
International	8%	8%

VISITOR PROFILE – Winter 2019 VS. 2020

Top Visitor Activities	Winter 2019	Winter 2020
Restaurants	94%	88%
Beach	79%	80%
Relax and unwind	85%	79%
Shopping, antiquing	76%	70%
Family time, reading, cooking, etc.	59%	60%
Biking, running, etc.	37%	36%
Bars, nightclubs	31%	35%
Special events	28%	32%
Hiking, nature walks, eco tours	27%	30%
State parks	26%	25%
Golf or tennis	26%	23%
Attractions	19%	22%

VISITOR PROFILE – Winter 2019 VS. 2020

Visitor Metrics	Winter 2019	Winter 2020
Will return to South Walton	94%	94%
Rating for overall experience ¹	9.1 ¹	9.0
Viewed Visitors Guide	18%	18%
Planned trip	6+ months out	6+ months out
Used VisitSouthWalton.com	17%	14%
Used 1 of 16 beaches' websites	25%	19%

¹ 10-point scale with 10=Excellent & 1=Poor.

² 15% used the online version & 3% used the print version.

DETAILED FINDINGS



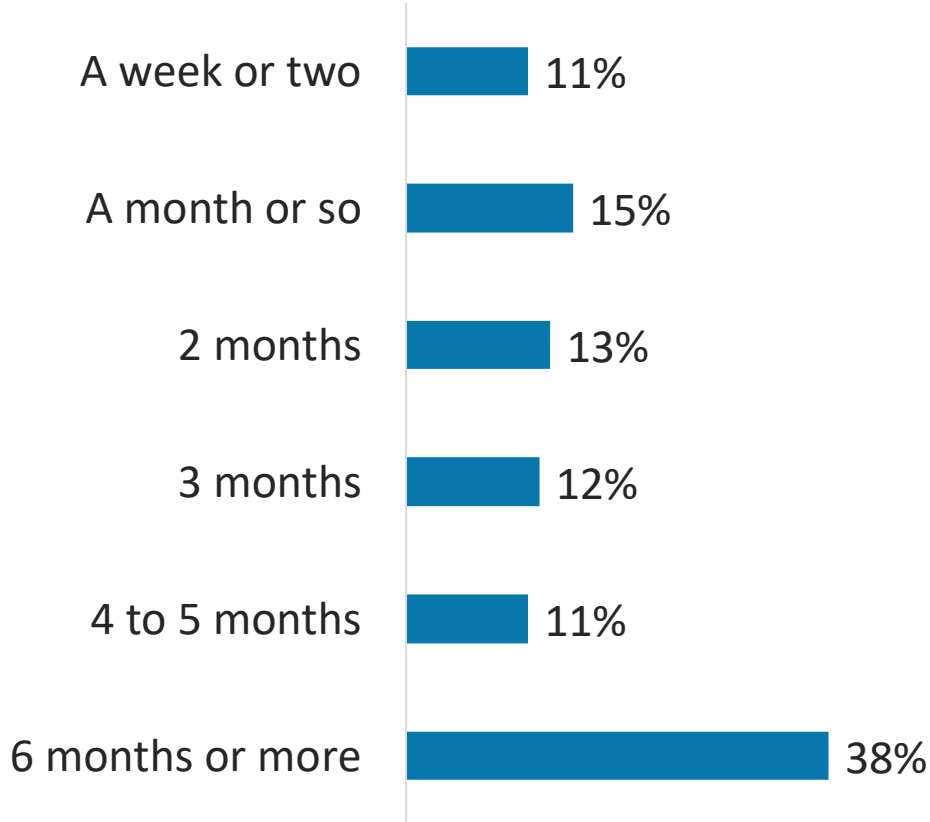
VISITOR JOURNEY: PRE-VISIT




PLANNING CYCLE

Nearly **5 in 10** visitors plan a Winter South Walton vacation at least **4 months out**.

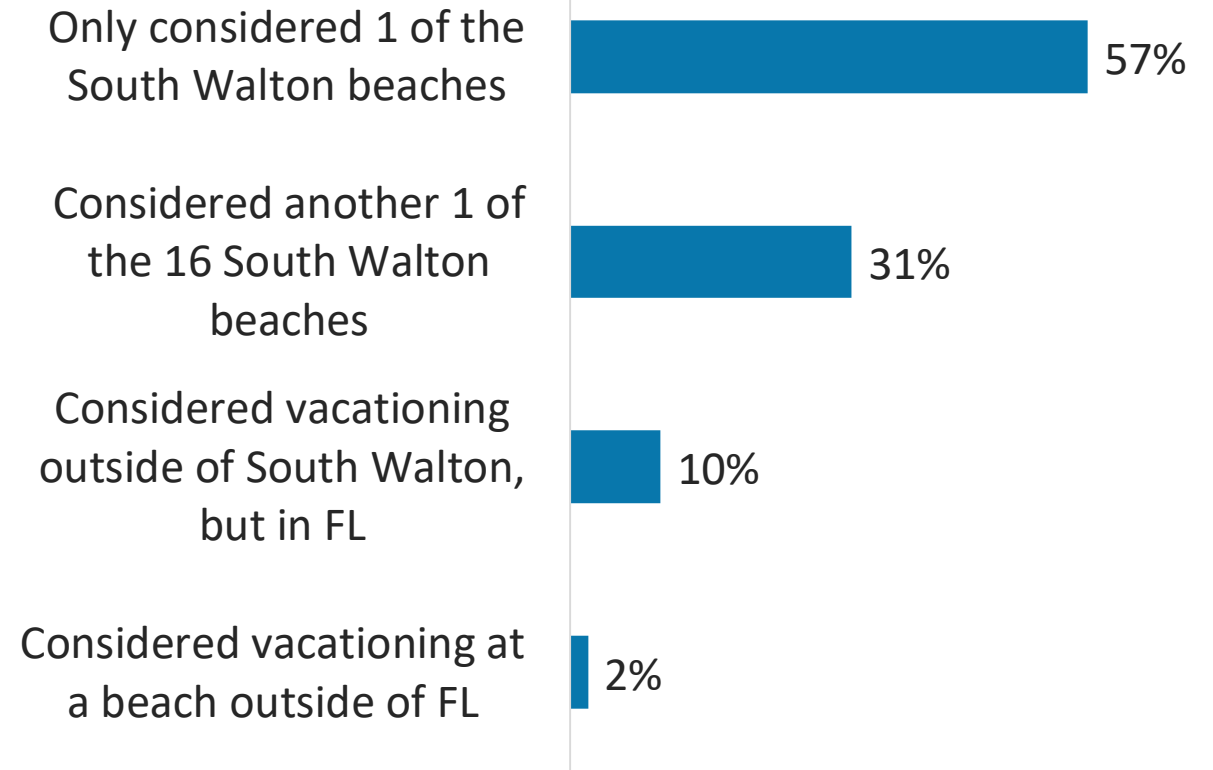
Relatively few visitors to South Walton have **a short (a month or less) planning cycle**.



OTHER DESTINATIONS CONSIDERED

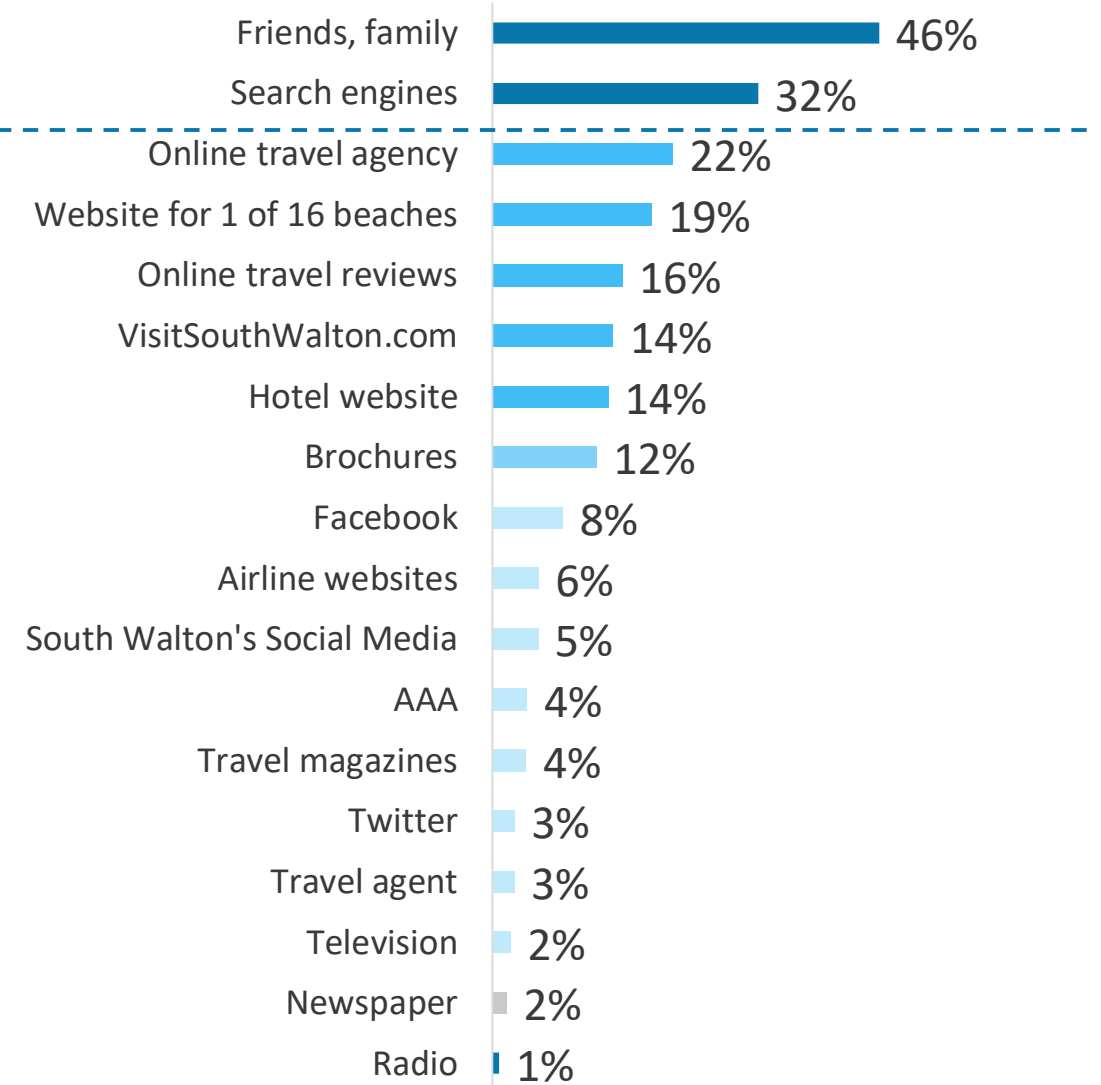


Only **12%** of visitors considered vacationing at a beach outside of South Walton.



PLANNING SOURCES¹

Nearly **half** of visitors used friends and family to help plan their trip to South Walton.

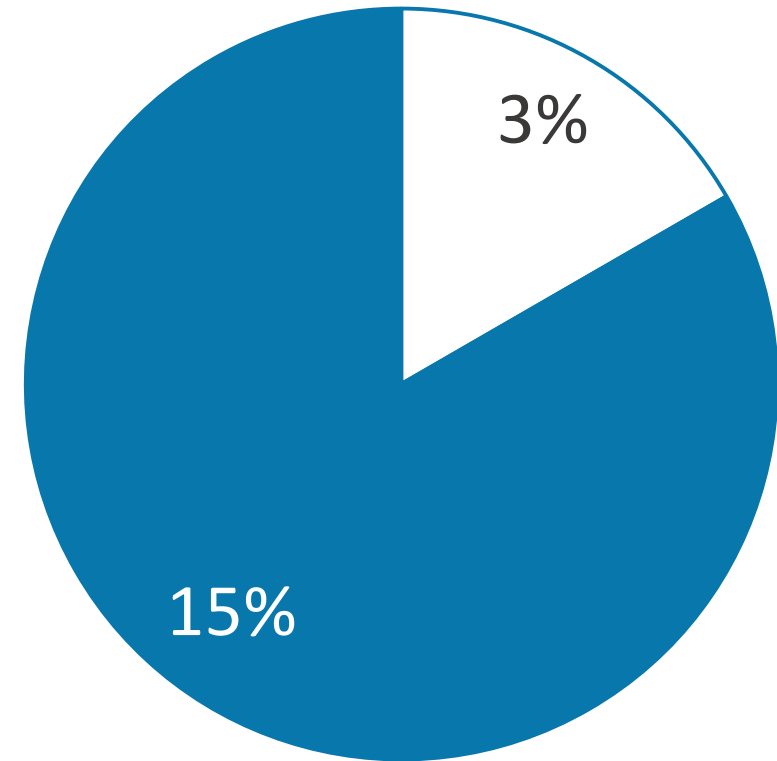


¹Multiple responses permitted.

SOUTH WALTON VISITOR GUIDE

18% of visitors viewed a South Walton Visitors Guide before going to South Walton.

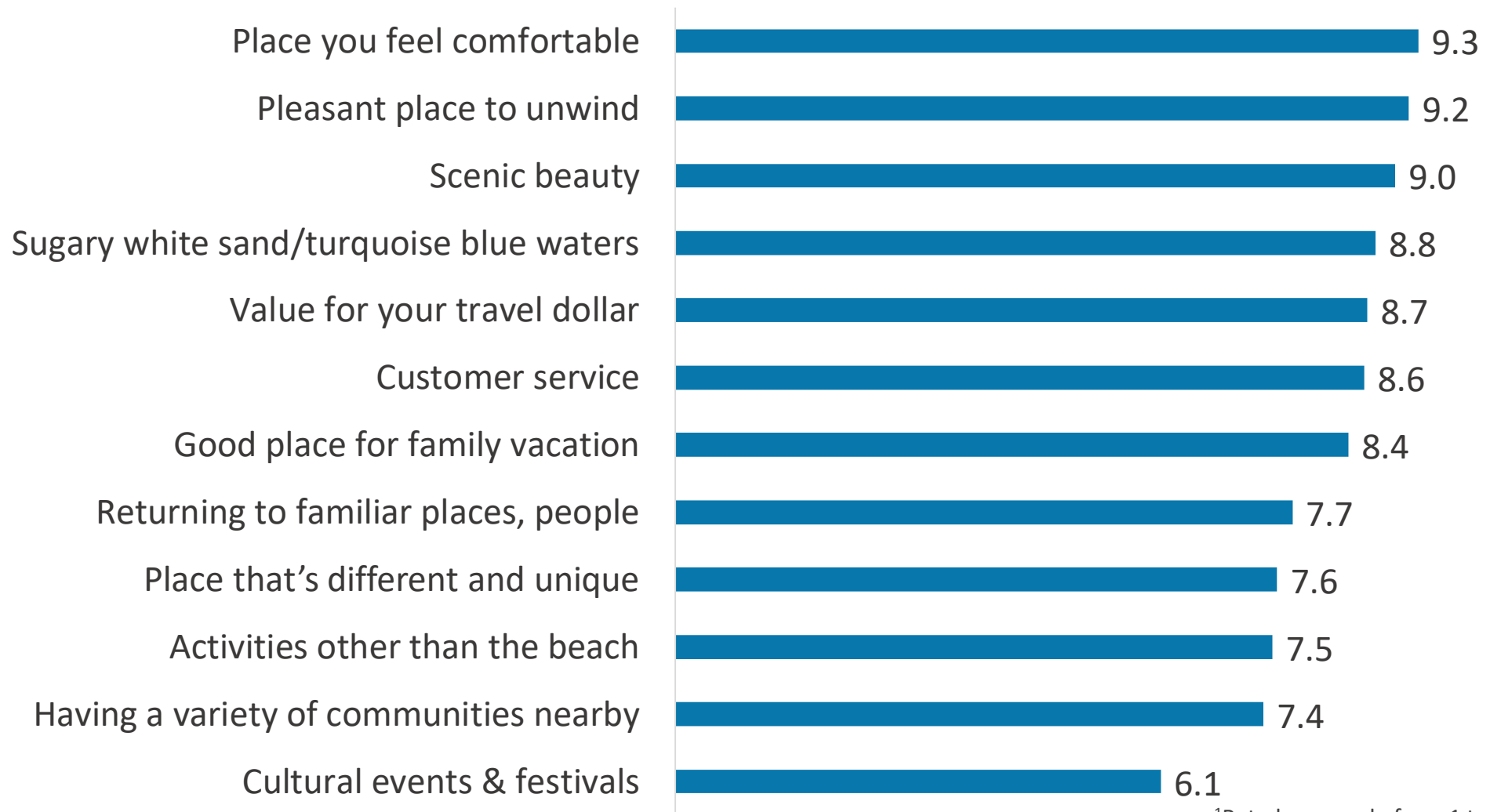
Visitors Guide received a rating of **7.7 out of 10¹**.



☐ Print version ☒ Online version

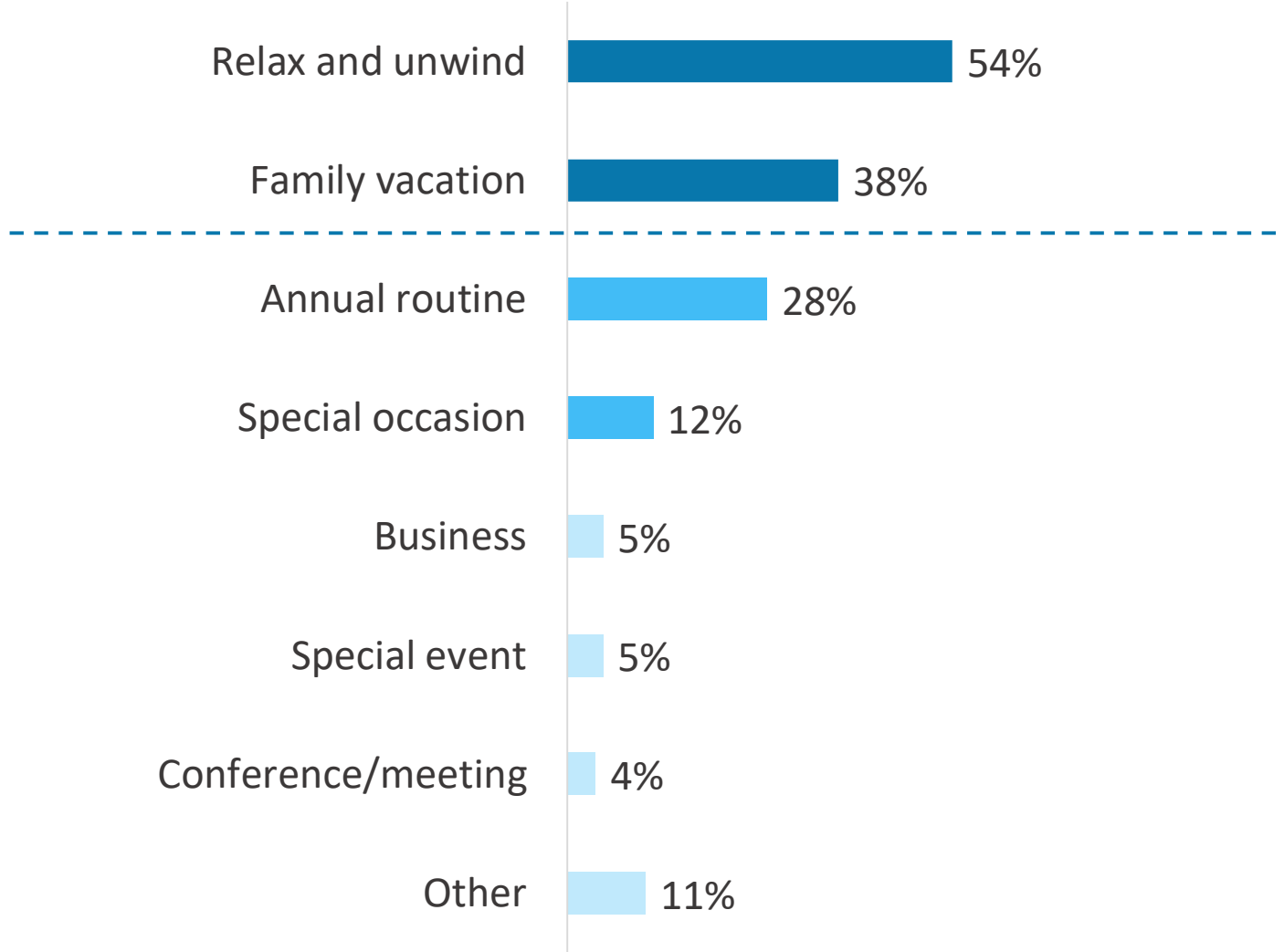
¹Rated on a 10 point scale where 10 is extremely useful and 1 is not at all useful.

IMPORTANT VACATION DESTINATION ATTRIBUTES¹



¹Rated on a scale from 1 to 10 where 10 is very important and 1 is not at all important.

REASONS FOR VISITING¹

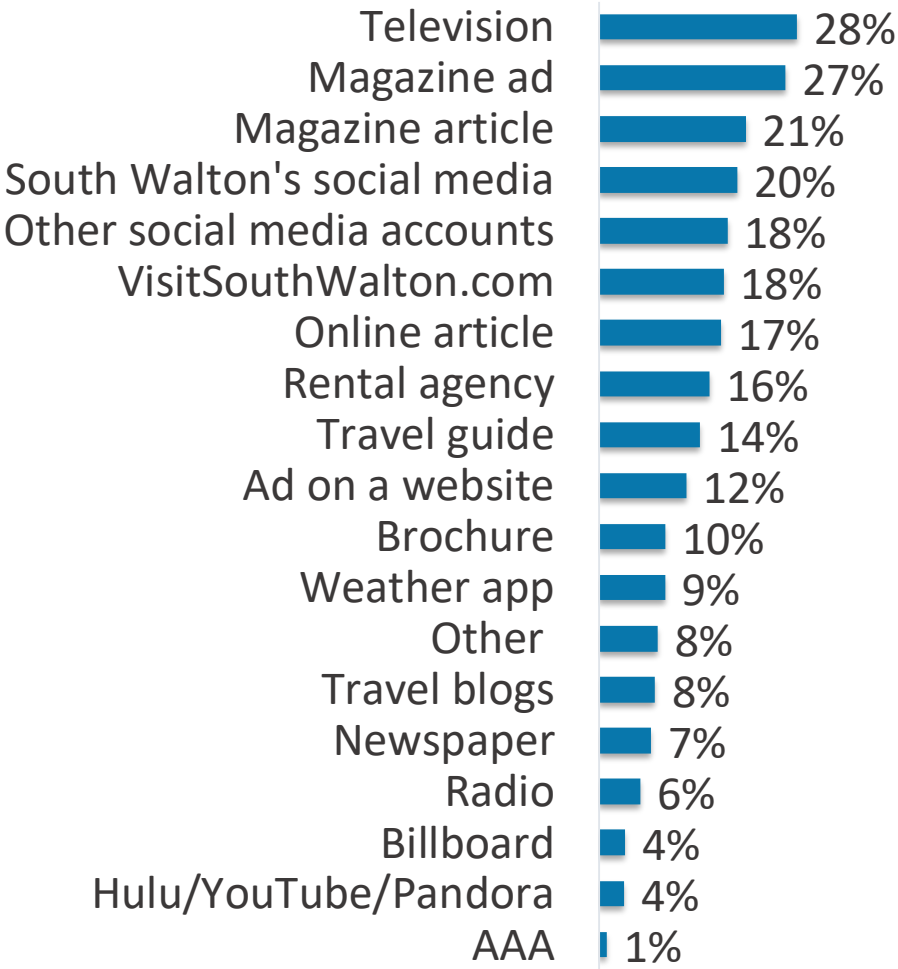


¹Multiple responses permitted.

SOUTH WALTON PROMOTIONS¹

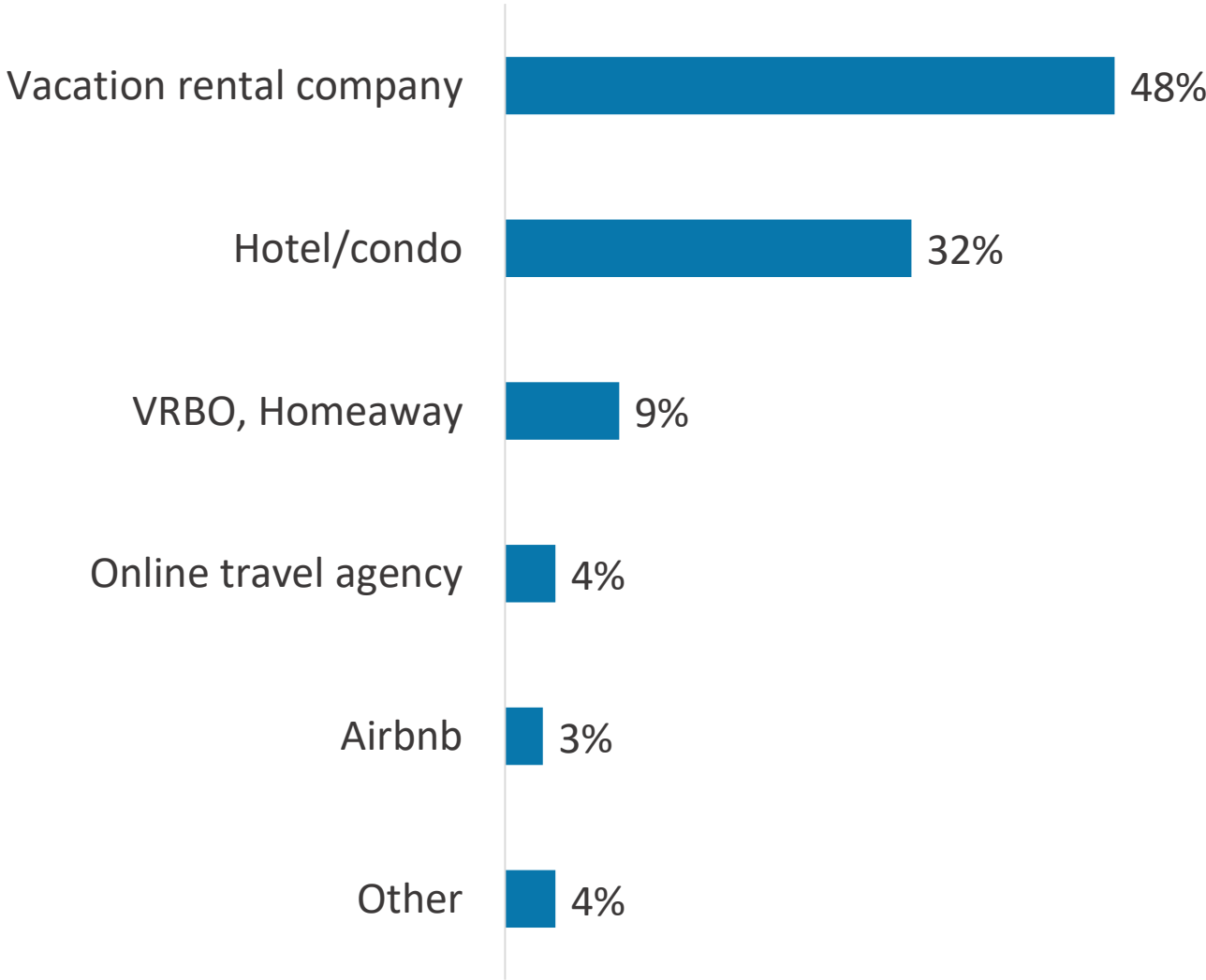


28% of Winter visitors have recently seen, read or heard advertising, promotions or travel stories about South Walton.




¹Multiple responses permitted.


BOOKING ACCOMMODATIONS



VISITOR TRANSPORTATION

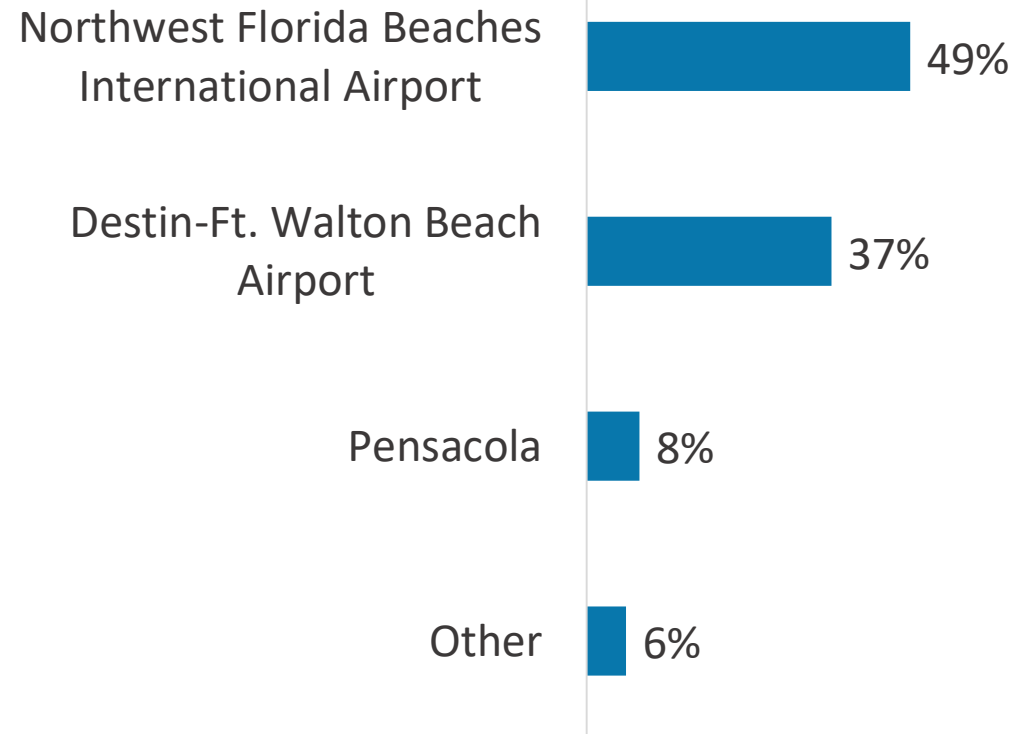


85% of Winter visitors drove to South Walton.



23% of those who drove were aware that there were direct flights from their city to the South Walton area.

15% who **flew** used the following airports:

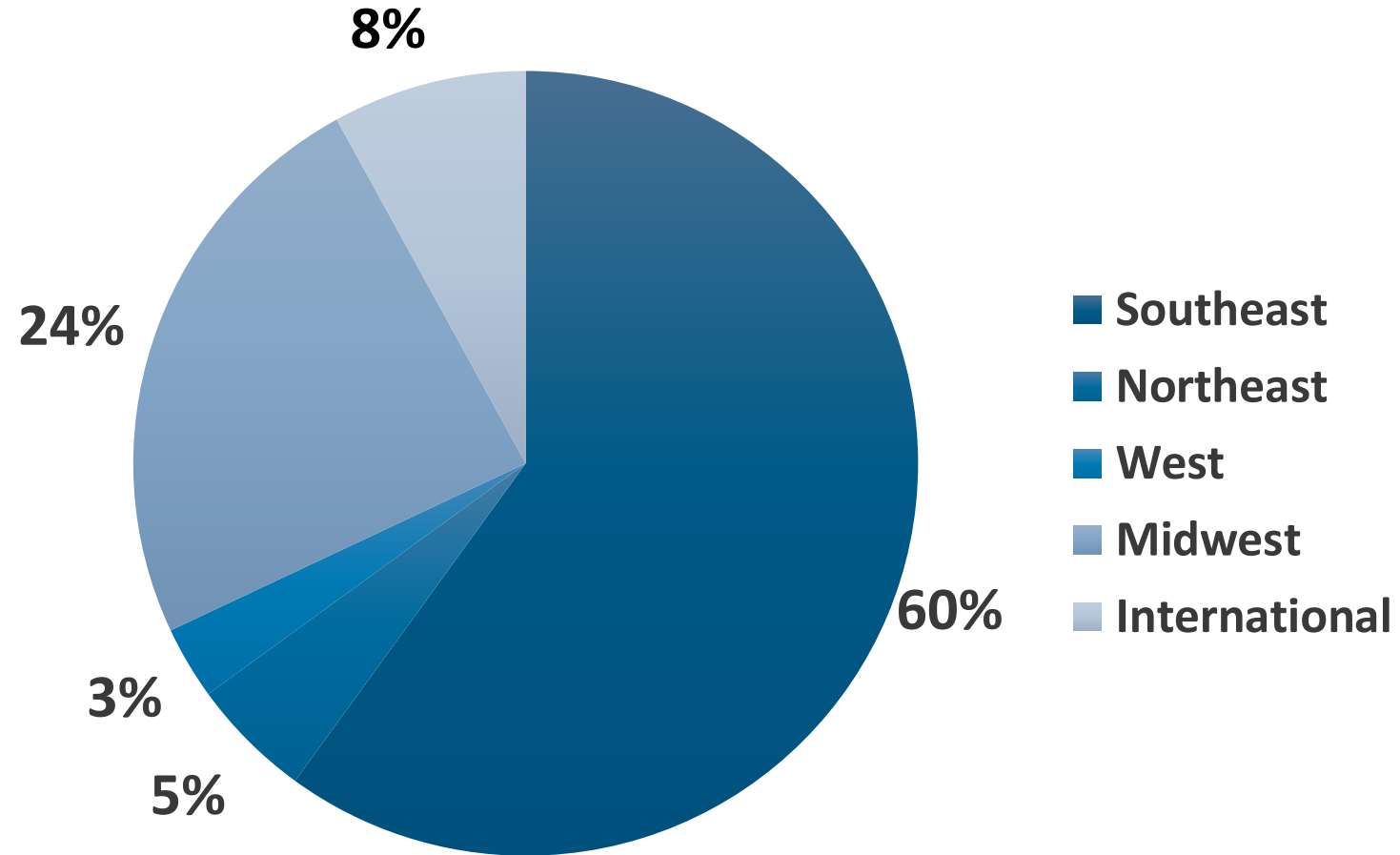


VISITOR JOURNEY: TRAVEL PARTY PROFILE



ORIGIN OF Winter VISITORS

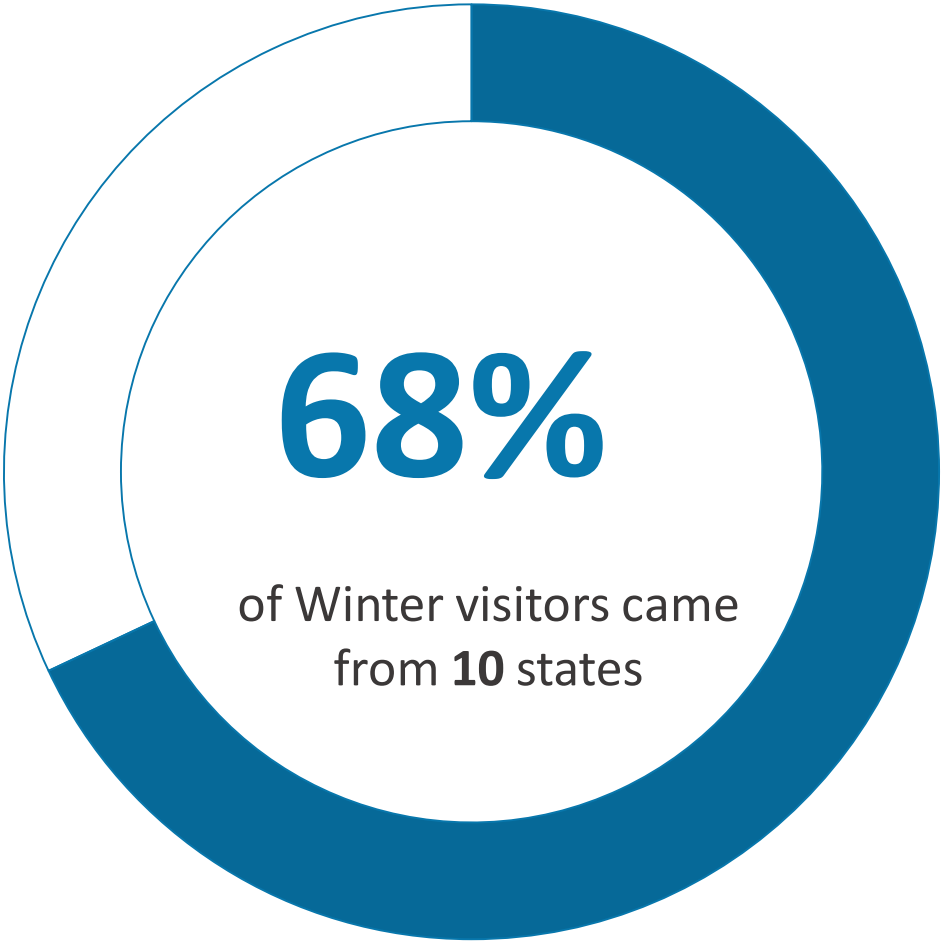
Top Origin Markets	% of Visitors
Atlanta	11%
Pensacola-Mobile	9%
Nashville	4%
Panama City-Destin	4%
Birmingham	4%
New Orleans	3%
Orlando	2%
St. Louis ¹	2%
Minneapolis	2%
Detroit	2%
New York City	2%
Knoxville	2%
Kansas City	2%
Dallas-Ft. Worth	2%



¹The metro area of St. Louis includes some parts of Missouri and Illinois.

ORIGIN OF Winter VISITORS

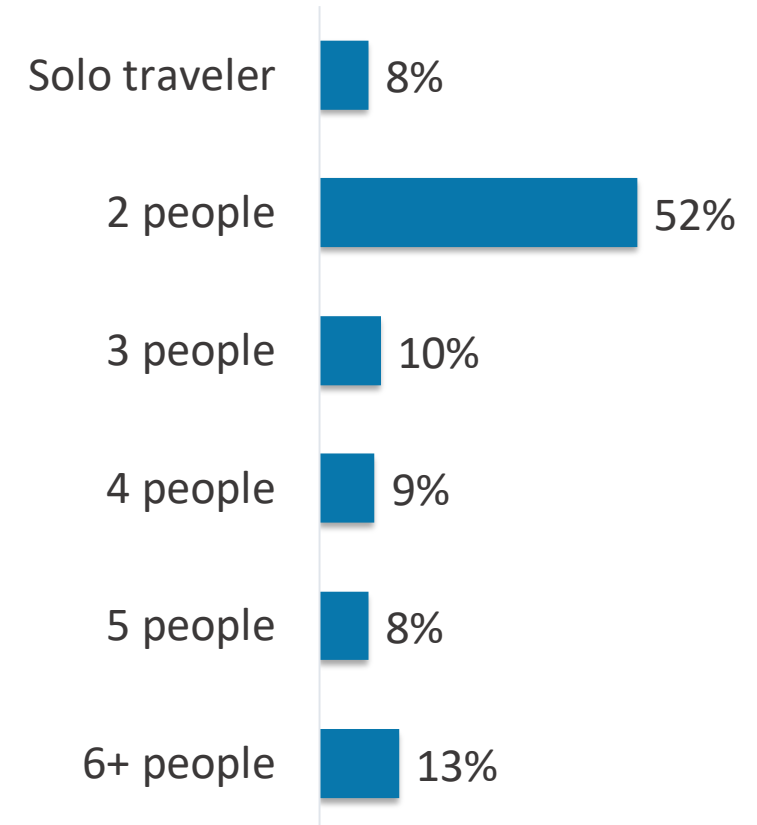
State	Percentage of Visitors
Florida	15%
Georgia	14%
Alabama	11%
Tennessee	7%
Michigan	5%
Texas	4%
Louisiana	3%
Ohio	3%
Indiana	3%
Illinois	3%



TRAVEL PARTY SIZE AND COMPOSITION

Visitors traveled in a party composed of **3.4** people.

25% of visitors traveled with children under the age of 20.

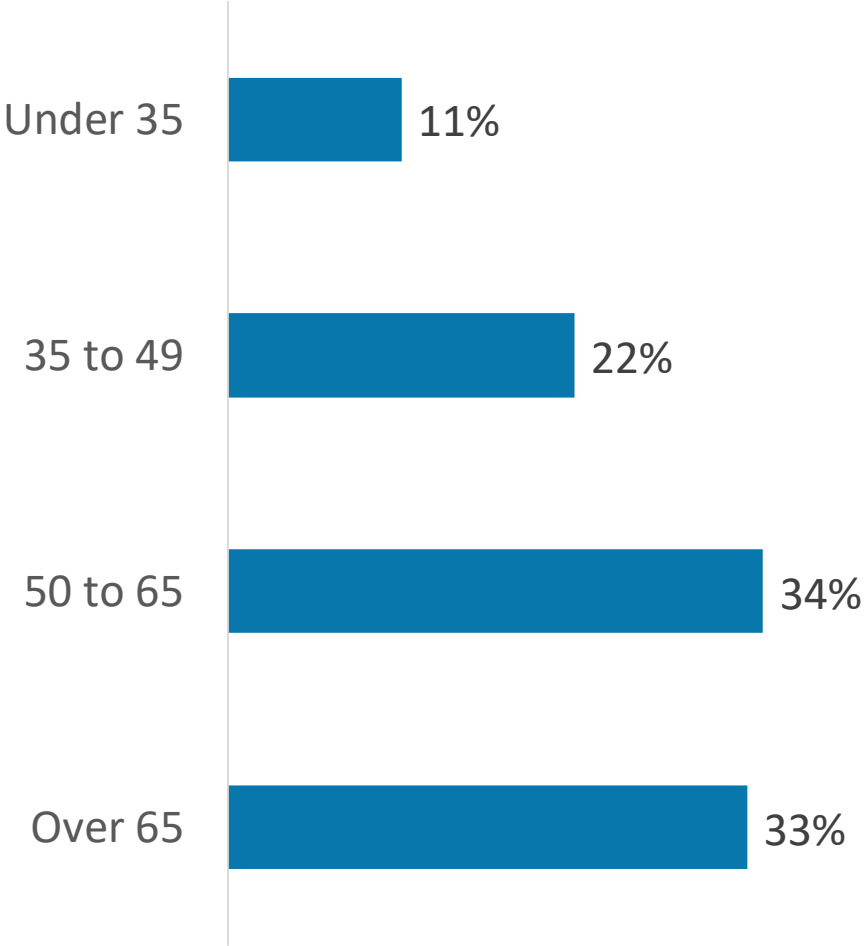


¹Multiple responses permitted.

AGE OF Winter VISITORS

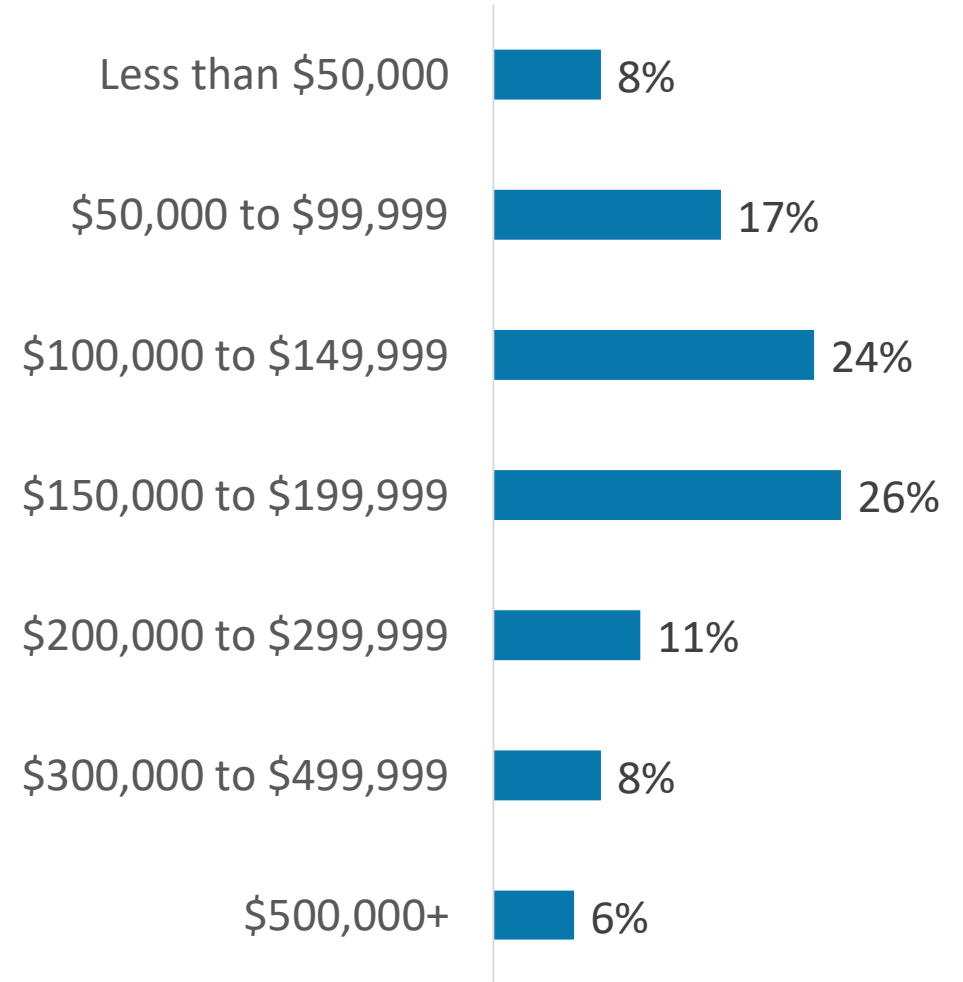


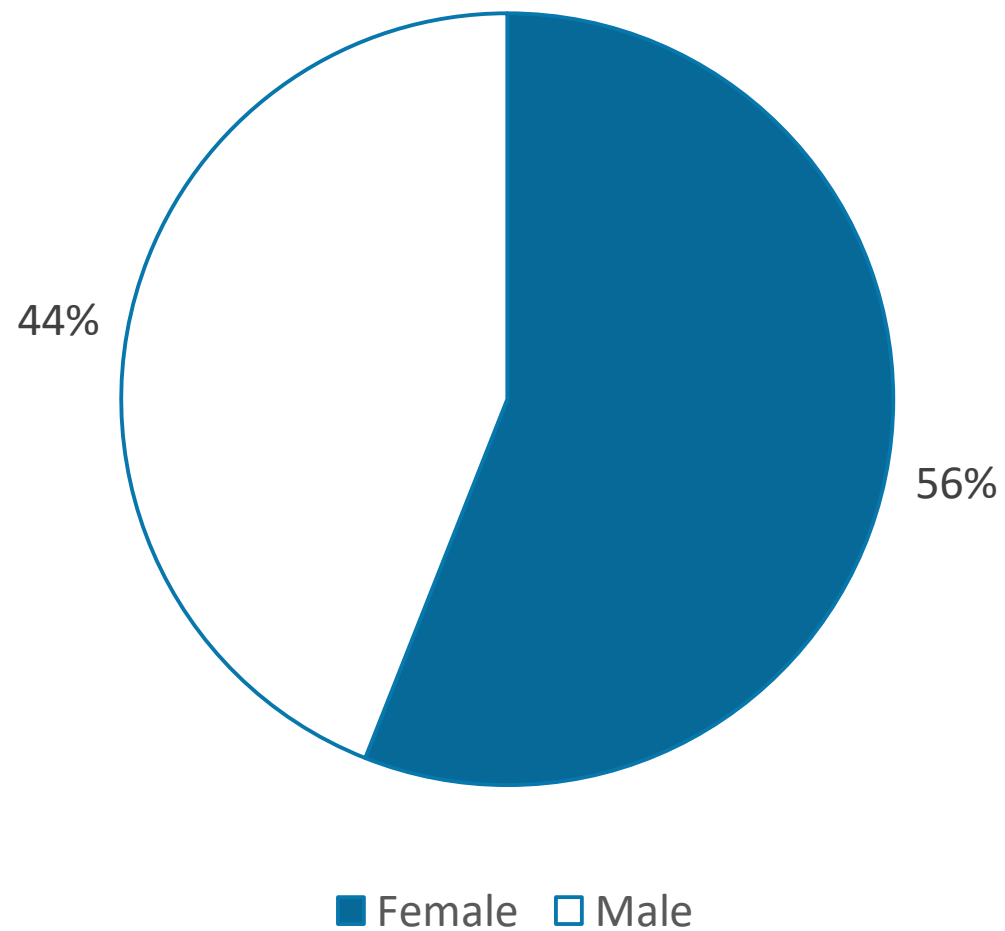
Median age of Winter visitors was **58 years old.**



TOTAL HOUSEHOLD INCOME IN 2018

Winter visitors had a median household income of **\$152,600**.

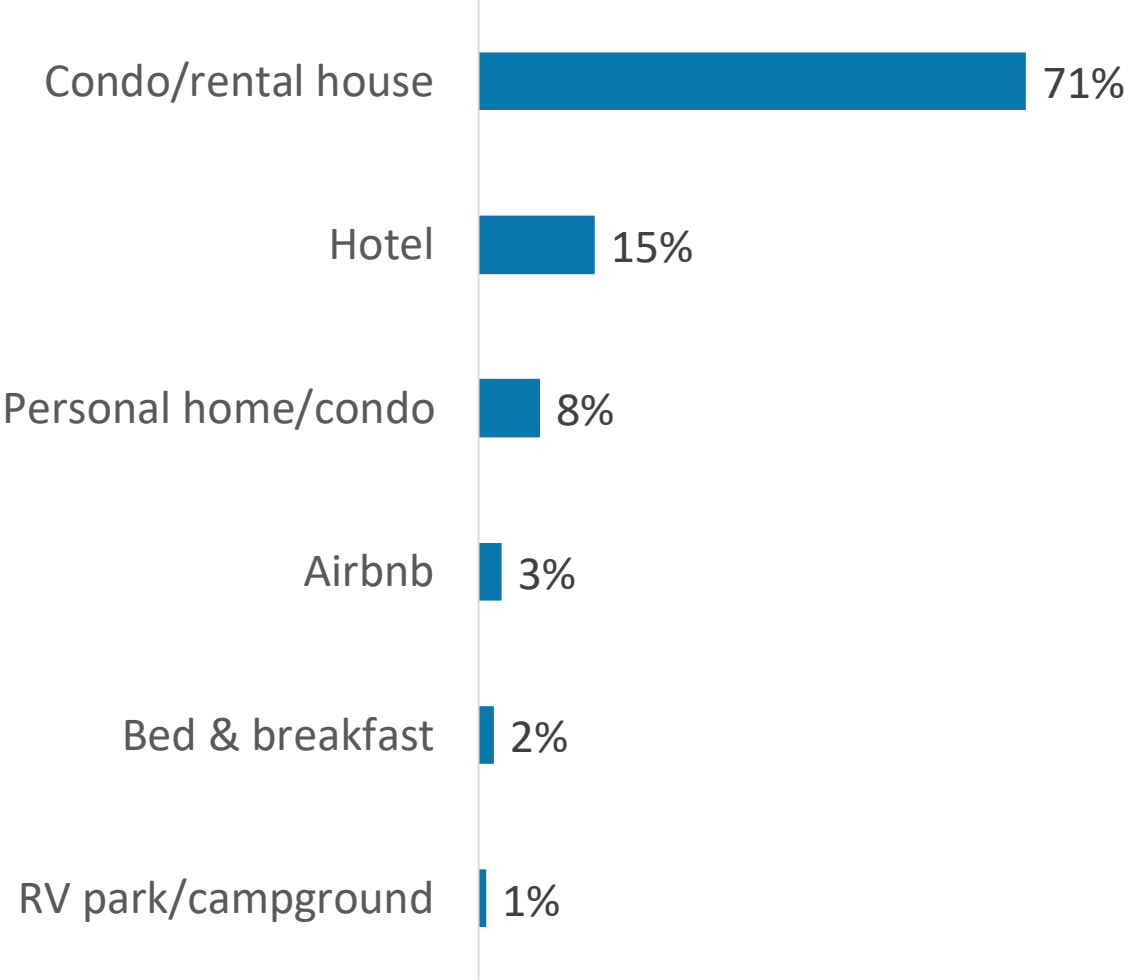




VISITOR JOURNEY: TRIP EXPERIENCE



VISITOR'S PAID ACCOMMODATIONS¹

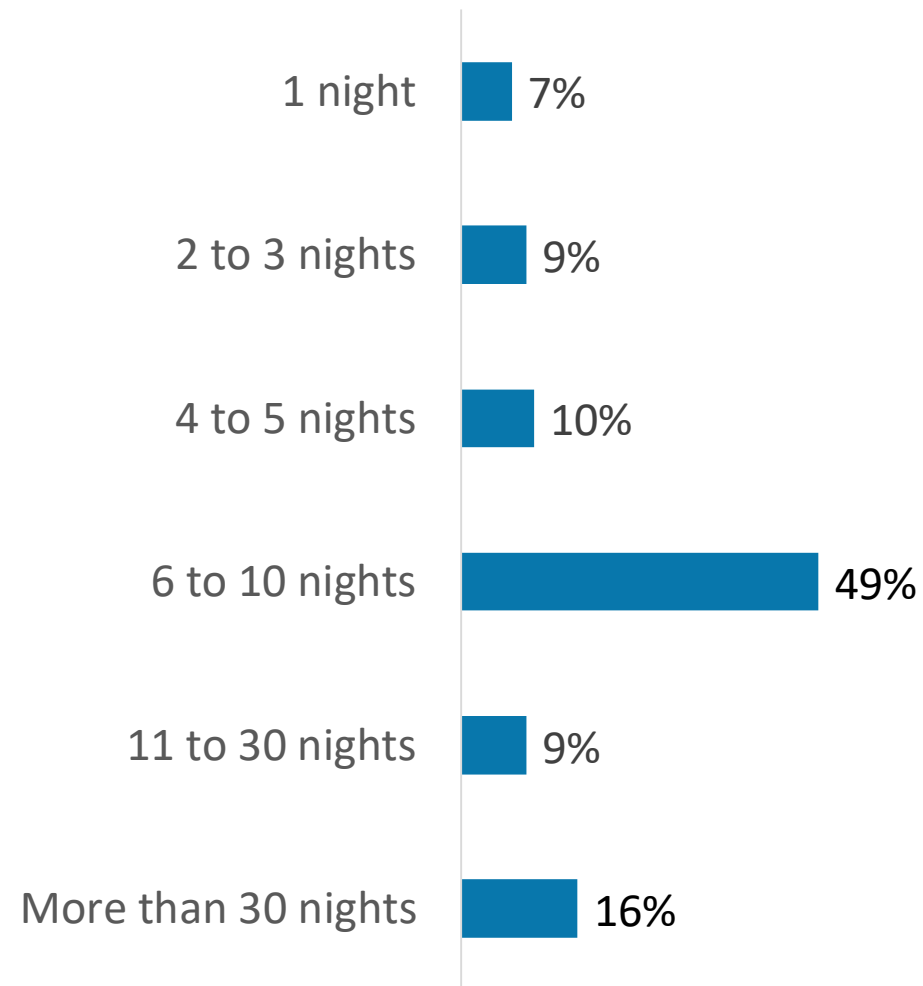


¹Excludes visitors staying with friends and relatives.

LENGTH OF STAY

Winter visitors¹ spent an average of **7.6** nights in South Walton.

When including long-term winter visitors², average length of stay was **21.1** nights.



¹Visitors who stayed in South Walton up to 30 nights.

²Includes visitors who stayed in South Walton for 30 nights or more.

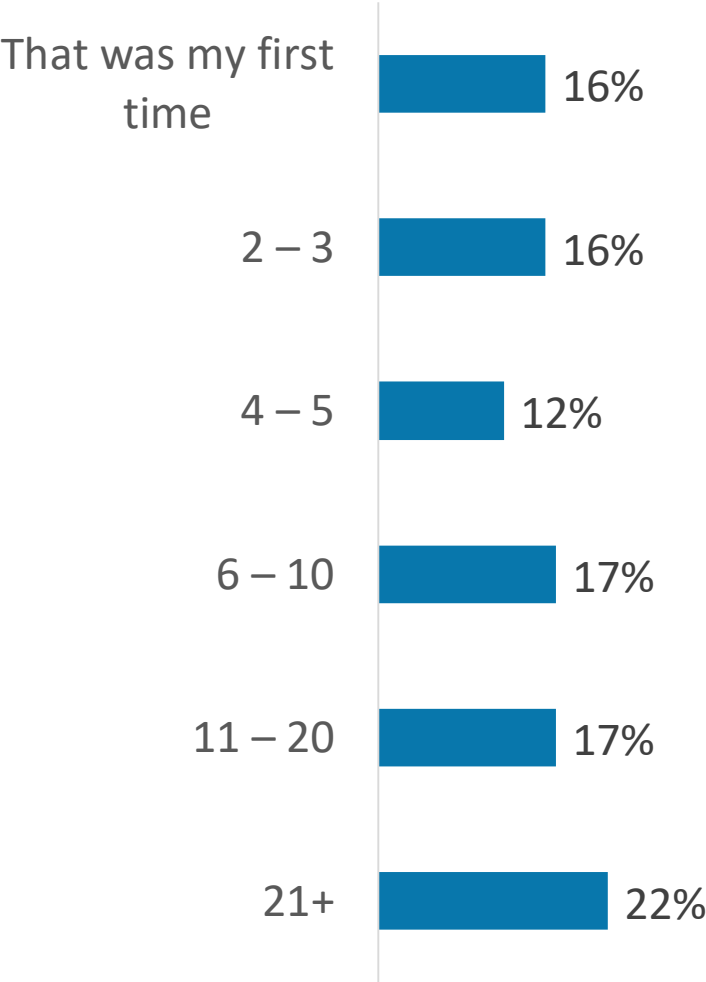
NUMBER OF VISITS TO SOUTH WALTON



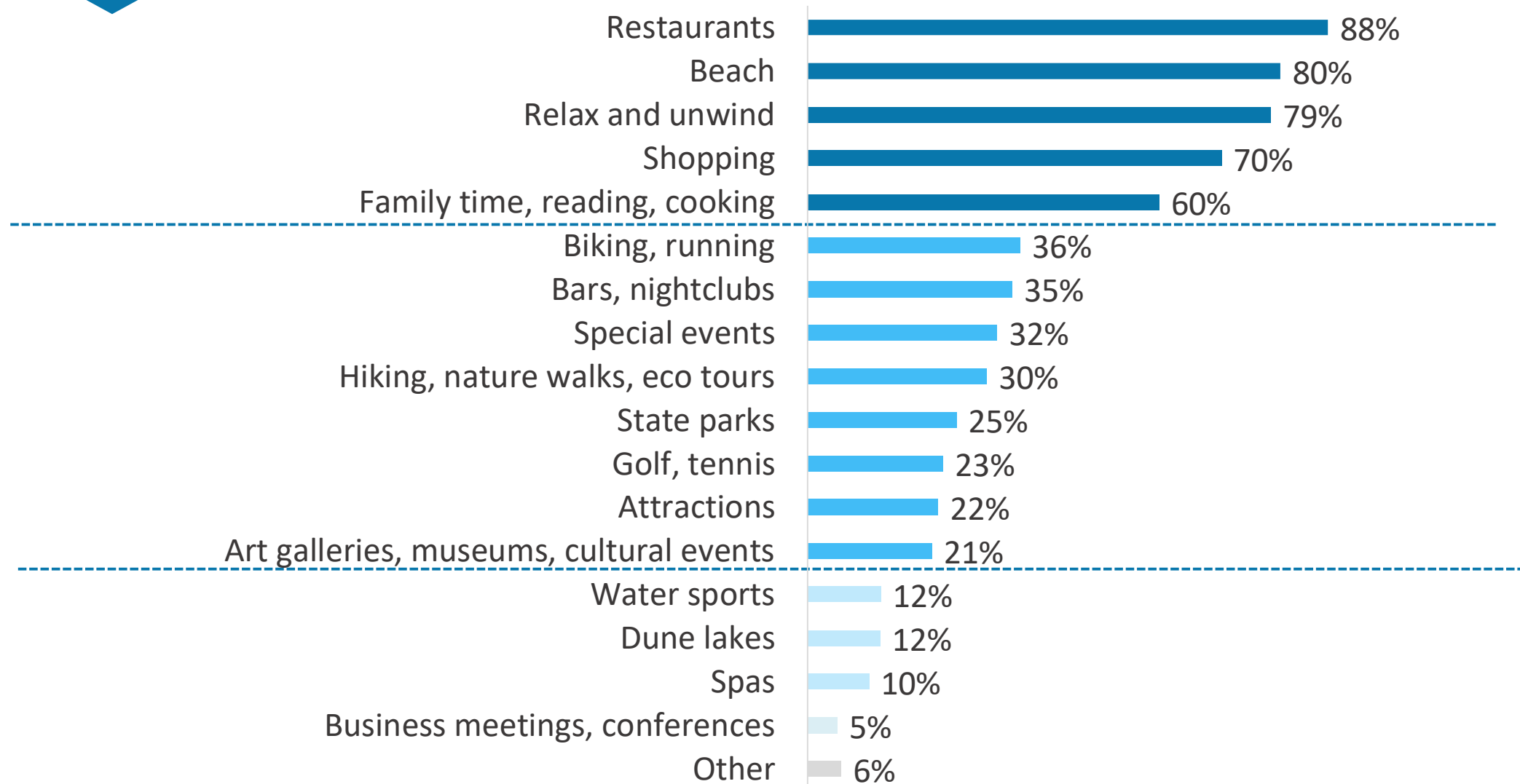
16% of Winter visitors were visiting for the first time.



4 in 10 Winter visitors have visited South Walton more than 10 times.



VISITOR ACTIVITIES¹



¹Multiple responses permitted.

TYPICAL SOUTH WALTON TRAVEL PARTY EXPENSES¹

Visitor Metrics ¹	Average Daily Expenditure	Total Trip Expenditure
Accommodations	\$228	\$1,733
Restaurants	\$149	\$1,132
Groceries	\$48	\$365
Shopping	\$113	\$859
Entertainment	\$64	\$486
Transportation	\$49	\$372
Other	\$38	\$289
Total	\$689	\$5,236

¹For visitors staying 30 days or fewer

²This figure differs from the ADR reported by properties because of various fees added to the price visitors pay such as swim & tennis fees, amenity fees, housekeeping fees, reservation fees, arts & entertainment fees, linen charges, damage fees, etc.

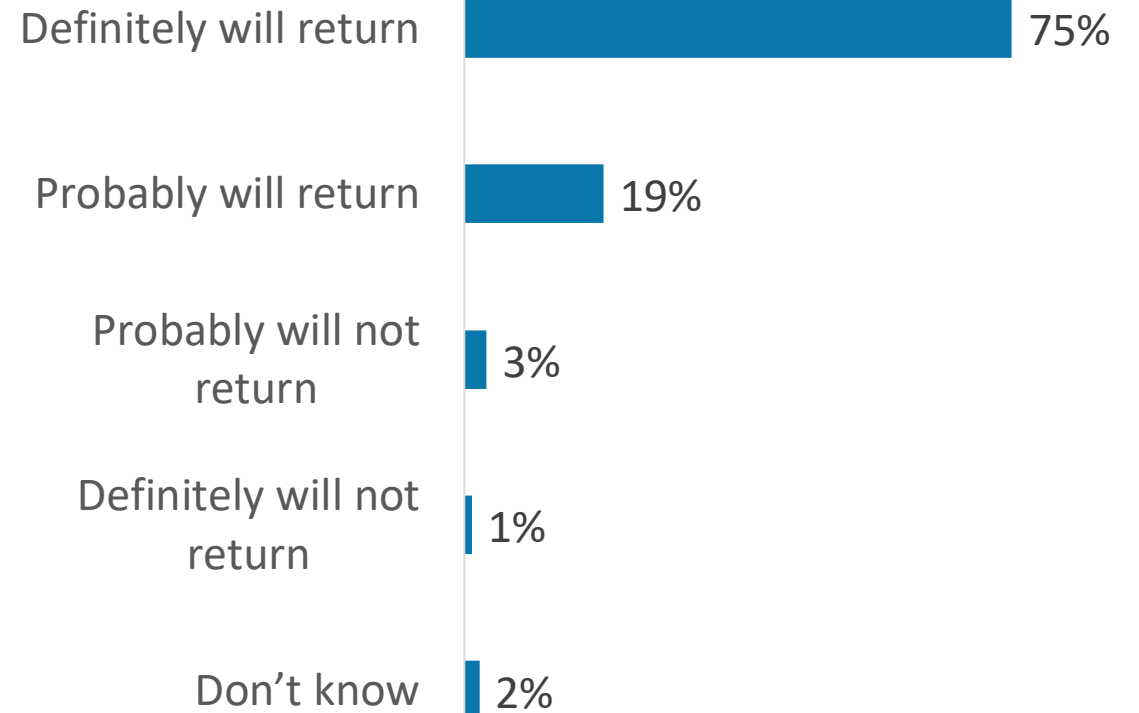
VISITOR JOURNEY: POST-TRIP EVALUATION



SATISFACTION WITH SOUTH WALTON

Visitors gave South Walton a rating of **9.0¹** as a place to vacation.

94% will return to South Walton.²

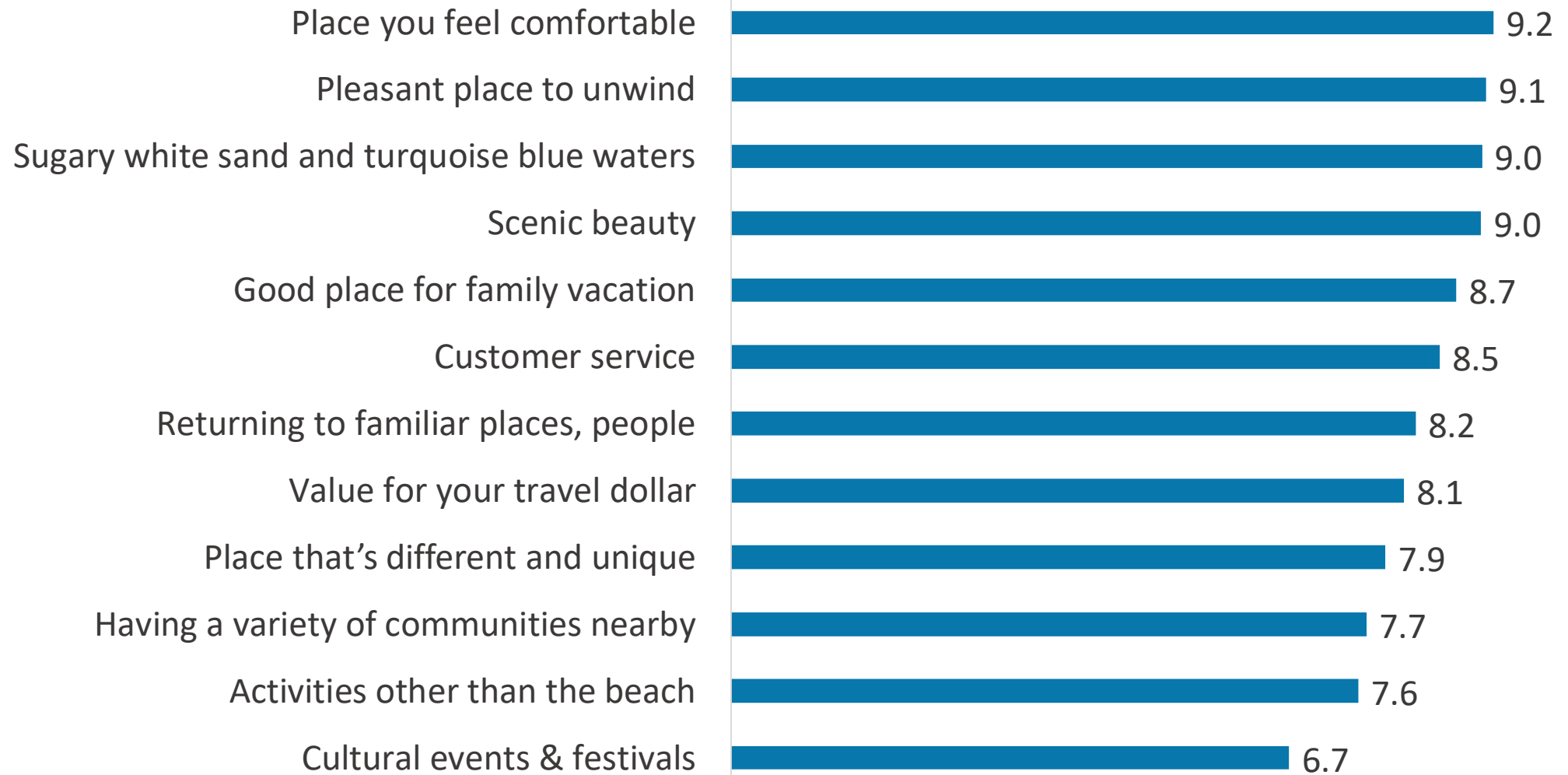


¹10 = Excellent; 1 = Poor

²4% of all visitors will not return to South Walton for the following reasons:

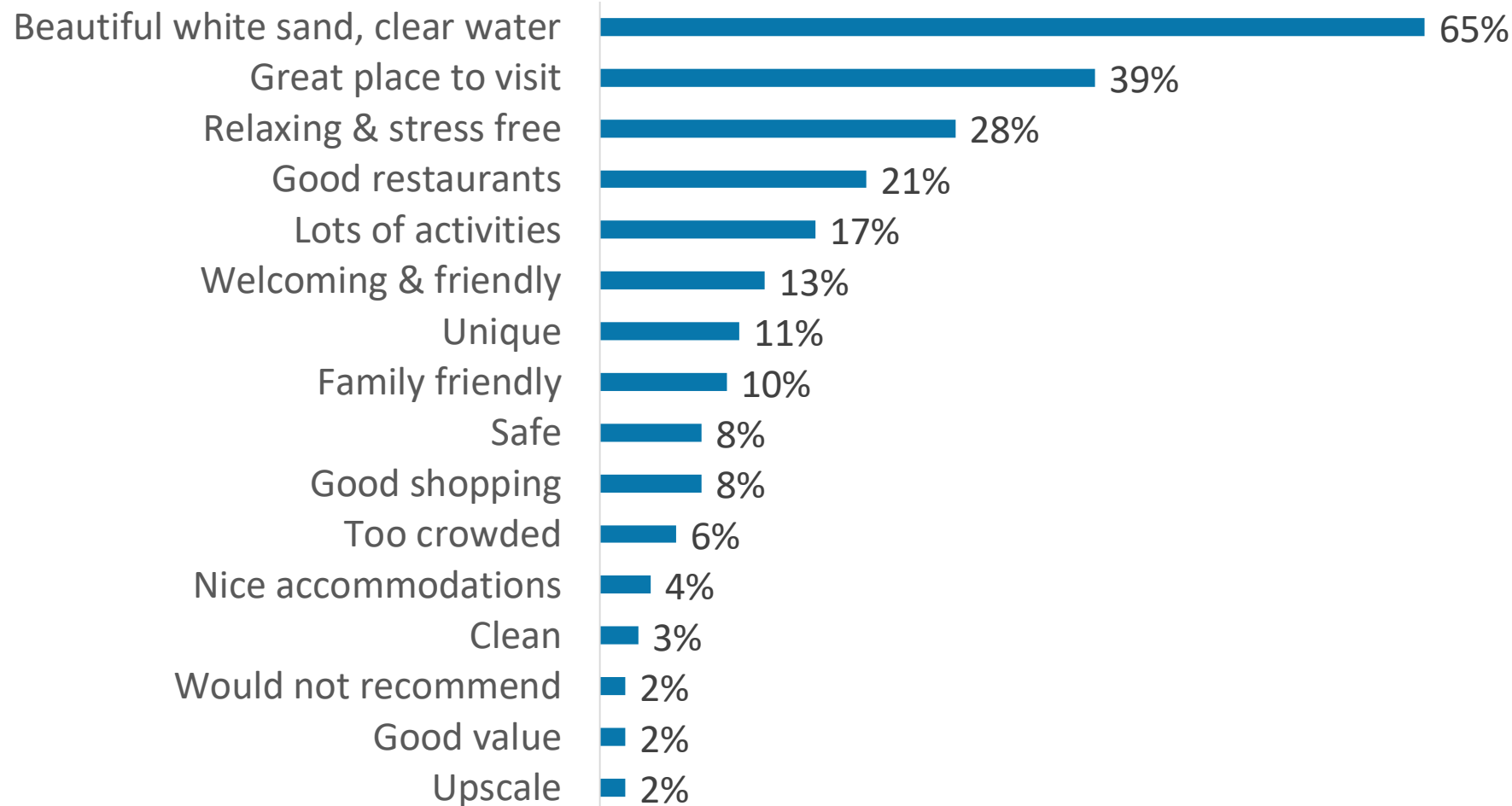
1. Not enough to do 2. Prefer other beaches 3. Prefer variety in vacation spots 4. Traffic was a problem 5. Poor customer service

RATING SOUTH WALTON¹



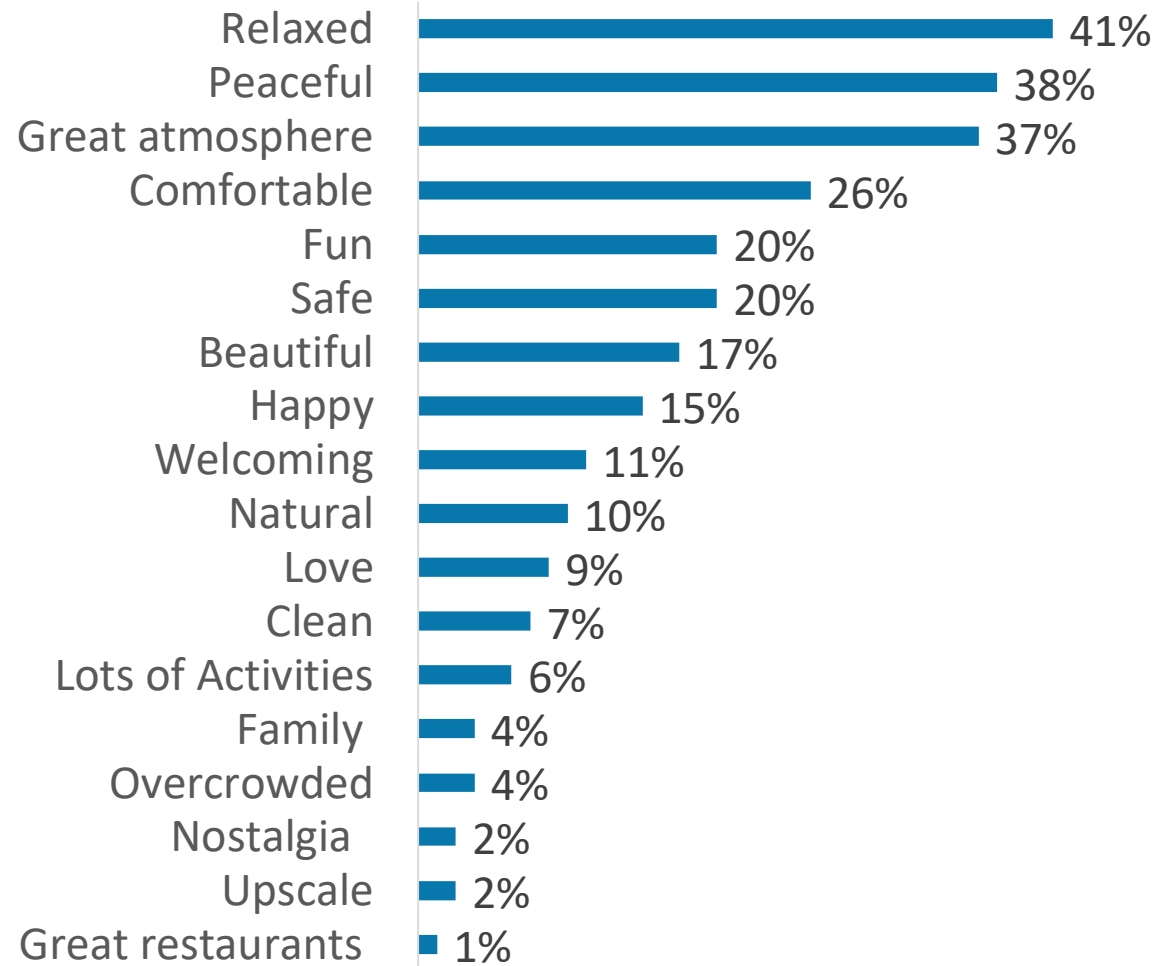
¹Rated on a scale from 1 to 10 where 1 is poor and 10 is excellent.

VISITOR DESCRIPTIONS OF SOUTH WALTON¹



¹Coded verbatim response; multiple responses permitted.

EMOTIONS ASSOCIATED WITH SOUTH WALTON¹



¹Coded verbatim response; multiple responses permitted.

VISIT SOUTH WALTON

Visitor Tracking Study

Winter 2020

(December 2019 to February 2020)



Joseph St. Germain, Ph.D
Phillip Downs, Ph.D.
Rachael Anglin
Erin Dinkel
Isiah Lewis
Glencora Haskins
dsg-research.com
850.906.3111