

# VISIT SOUTH WALTON

## Visitor Tracking Study

Summer 2020



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# STUDY OBJECTIVES: MAP THE VISITOR JOURNEY



# METHODOLOGY & PREFACE

## Visitor Tracking Study Methodology

This report is based on 1,326 internet and in-person surveys with Summer visitors who traveled to South Walton between June 2020 and August 2020.\*

## Preface

South Walton's visitor tracking and economic impact metrics were impacted by several factors in Summer 2020 including:

- Pent up demand from COVID-19
- Inventory increase

### **Pent up demand from COVID-19**

Fear of contracting COVID-19 certainly impacted all travel after March 15, 2020. However, after vacation rental units re-opened in May, occupancy levels rebounded higher than 2019 (+6 percentage points). South Walton visitors', particularly those from the Southeast, pent up demand for travel was on vivid display throughout the summer.

### **Inventory increase**

In addition, available units for visitors in Summer 2020 increased 939 units from 2019.

\*Interviews were with out-of-county guests who stayed at properties/vacation rentals at beach communities across South Walton, and at several locations along the beaches with day trippers, owners of second homes, and visitors staying with friends and relatives.

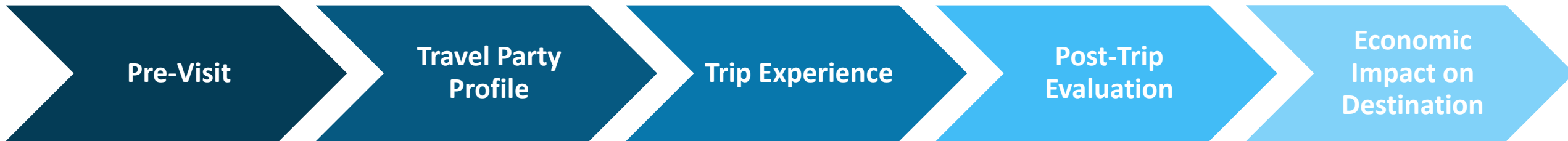


# EXECUTIVE SUMMARY



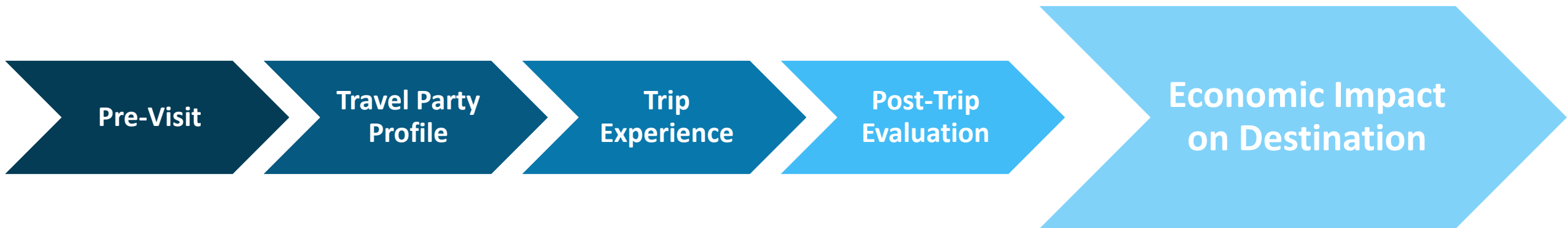
# VISITOR JOURNEY: ECONOMIC IMPACT

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 – SUMMER 2019 VS. 2020

South Walton may have the brightest tourism figures in the nation during COVID-19 as number of visitors, room nights and RevPAR were all up more than 10%.

A 6.7% increase in active units from Summer 2019 to Summer 2020, increases in occupancy and ADR, and an increase in TDT rate from 4% to 5% led to an increase in summer TDT of 36.8%.

With nearly 2.5 million summer visitors, total economic impact during summer 2020 was nearly \$2.4 billion.

Property Statistics	Summer 2019	Summer 2020	% Change
Room nights	1,046,108	1,152,811	+10.2%
Total visitors	2,191,600	2,428,300	+10.8%
TDT collections	\$13,966,563	\$19,106,264 <sup>1</sup>	+36.8% <sup>1</sup>
Direct spending	\$1,410,662,800	\$1,609,378,100	+14.1%
Economic impact	\$2,087,780,900	\$2,381,879,600	+14.1%
Occupancy	76.2% <sup>2</sup>	80.3%	+5.4%
Room rates	\$418.97 <sup>2</sup>	\$438.06	+4.6%
RevPAR	\$319.26 <sup>2</sup>	\$351.76	+10.2%

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

<sup>1</sup> 2020 tax rate is 4.5% compared to 4% in 2019. At the 4% level, summer 2020 TDT collections exceeded 2019 collections by 9.6%.

<sup>2</sup> Adjusted to reflect more reliance on Key Data.



# ECONOMIC IMPACT - LODGING STATISTICS

**80.3%**

Occupancy

↑ 5.4%

**\$438.06**

ADR

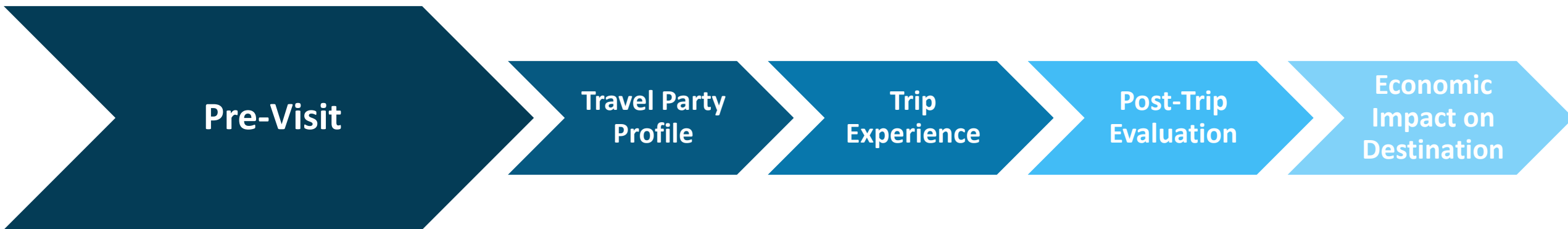
↑ 4.6%

**\$351.76**

RevPAR

↑ 10.2%

# VISITOR JOURNEY: PRE-VISIT



# PLANNING CYCLE

- » **1 in 2** visitors plan a Summer South Walton vacation at least 4 months in advance
- » **1 in 5** considered vacationing at a beach outside of South Walton
- » 1 in 3 visitors used the term “South Walton,” an all-time high



# TRIP PLANNING SOURCES\*



Friends, family **51%**

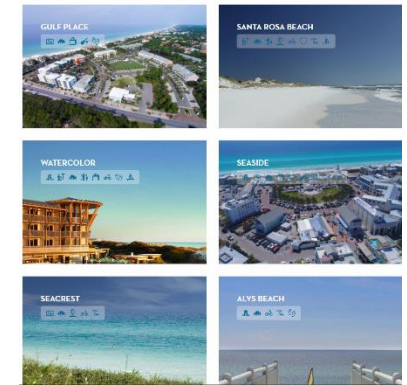
Search engines **36%**



Travel websites **27%**



Website for 1 of the 16 beach neighborhoods **29%**



VisitSouthWalton.com **25%**



\*Multiple responses permitted.



# SOUTH WALTON VISITOR GUIDE

- » **32%** of visitors viewed the South Walton Visitors Guide before going to South Walton
- » Visitors Guide received a rating of **7.5 out of 10<sup>1</sup>**



<sup>1</sup> 10 = Extremely useful; 1 = Not at all useful

# TOP REASONS FOR VISIT\*

Family vacation **77%**



Relax and unwind **57%**



Annual routine **22%**



Special occasion **11%**



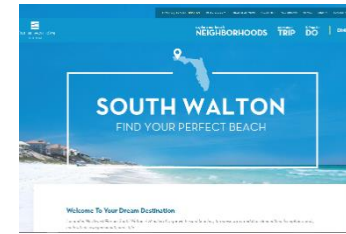
\*Multiple responses permitted



# SOUTH WALTON PROMOTIONS

- » **27%** of visitors have recently noticed promotions about South Walton
- » This information influenced **9%** of visitors to visit South Walton

VisitSouthWalton.com Other Social media



Television



Website Ad



# TOP BOOKING SOURCES

Vacation Rental Company **53%**

ROSEMARY  
BEACH  
COTTAGE RENTAL COMPANY

HOMEOWNER'S  
COLLECTION  
— Seaside, Florida —

NEWMAN-DAILEY  
RESORT PROPERTIES, INC.

Hotel/condo **29%**

Residence  
Inn®  
Marriott®

 Sandestin®  
Golf and Beach Resort

  
hotel • dining • spa

VRBO, Homeaway **10%**

 HomeAway®

 VRBO®  
from HomeAway®

VacationRentals.com™  
Part of the HomeAway Family

# VISITOR TRANSPORTATION

- » **86%** of visitors drove to South Walton
- » **14%** who flew used the following airports:

**52%**

Northwest Florida Beaches  
International Airport



**36%**

Destin-Ft. Walton Beach  
Airport



**7%**

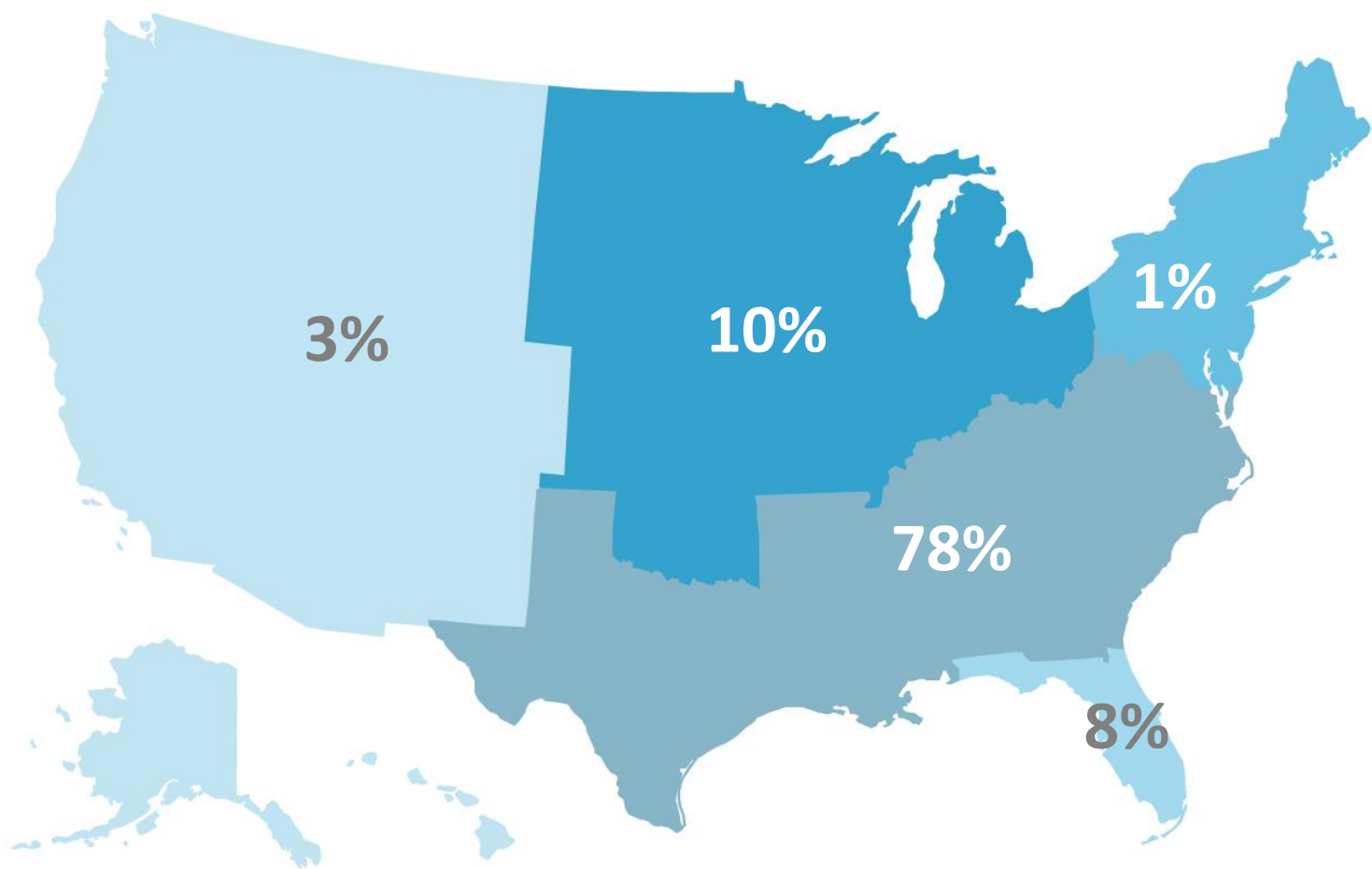
Pensacola International  
Airport



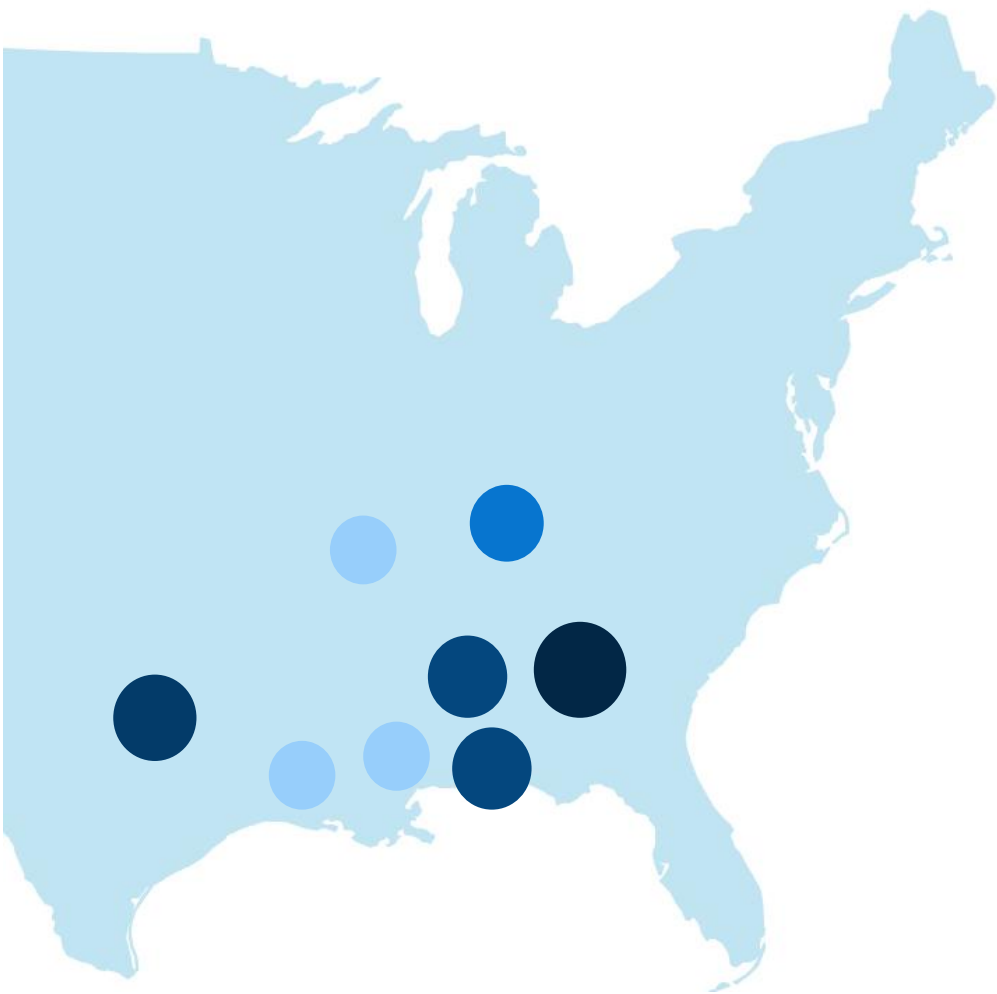
# VISITOR JOURNEY: TRAVEL PARTY PROFILE



# ORIGIN OF SUMMER VISITORS



# ORIGIN OF SUMMER VISITORS



- 23% ● Atlanta
- 6% ● Dallas – Ft. Worth
- 6% ● Birmingham
- 6% ● Pensacola-Mobile
- 5% ● Nashville
- 4% ● Houston
- 4% ● New Orleans
- 3% ● Memphis



# TRAVEL PARTY SIZE AND COMPOSITION

The typical visitor traveled in a party composed of **5** people



**65%** traveled with at least one person under the age of 20 in their travel party



# SUMMER VISITOR PROFILE



- » The typical South Walton Summer visitor:
  - » **51** years old
  - » Female **65%**
  - » Median household income of **\$178,300**
  - » From the Southeast **86%**

# VISITOR PROFILE: TYPICAL VACATIONER<sup>1</sup>



## →The typical Vacationer<sup>1</sup> Visitor:

- Is **50** years old
- Has a median household income of **\$179,200**
- Is female **68%**
- 64%** travel with children
- 86%** drive to the area
- Is from:
  - Southeast **86%**

<sup>1</sup>Travel parties who stayed 1-10 nights.



# VISITOR PROFILE: TYPICAL LONG-TERM<sup>1</sup> VISITOR

## →The typical Long-Term<sup>1</sup> Visitor:

- Is **56** years old
- Has a median household income of **\$354,500**
- Is female **63%**
- 71%** travel with children
- 80%** drive to the area
- Is from:
  - Southeast **80%**

<sup>1</sup>Travel parties who stayed more than 10 nights.

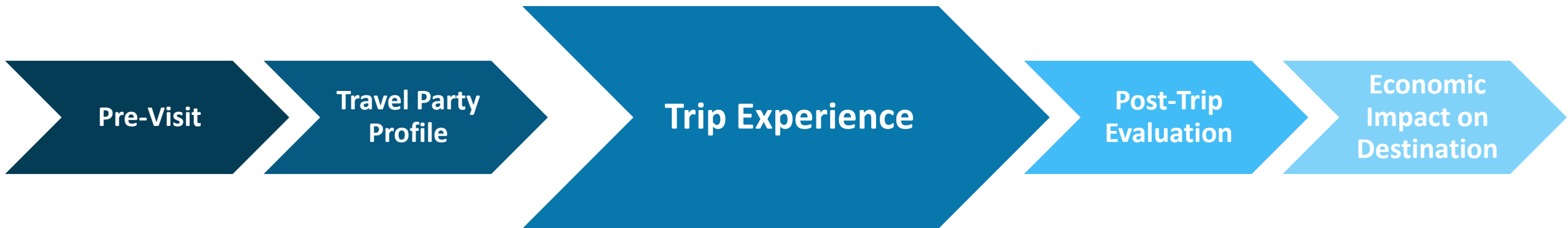
# VISITOR PROFILE: TYPICAL DAY TRIPPER

## » The typical Day Trip Visitor:

- » Is **46** years old
- » Has a median household income of **\$136,400**
- » Is female **67%**
- » **54%** travel with children
- » **91%** drive to the area
- » Is from:
  - » Southeast – not including FL **68%**
  - » Florida **26%**



# VISITOR JOURNEY: TRIP EXPERIENCE





# ACCOMMODATIONS

**68%** Condos, rental houses, etc.



**16%** Hotels



**9%** Personal condo



# TOP VISITOR ACTIVITIES\*

Beach **94%**



Restaurants **86%**



Relax and unwind **77%**



Family time, reading,  
cooking **66%**



Shopping, antiques **54%**



Biking, running, etc. **42%**



\*Multiple responses permitted.



# LENGTH OF STAY

- » Visitors spent **6.2\*** nights in South Walton



\*Visitors who stayed 30 or fewer nights.

# FIRST – TIME AND EXPERIENCED VISITORS

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



# VISITOR EXPENDITURES\*

- » Visitors spent **\$1,039** a day
- » Visitors spent **\$6,441** on their trip



\*Visitors staying in paid accommodations.



# VISITOR JOURNEY: POST TRIP EVALUATION



# VISITOR SATISFACTION

- » Visitors gave South Walton a rating of **9.0<sup>1</sup>** as a place to vacation
- » **96%** will return to South Walton<sup>2</sup>

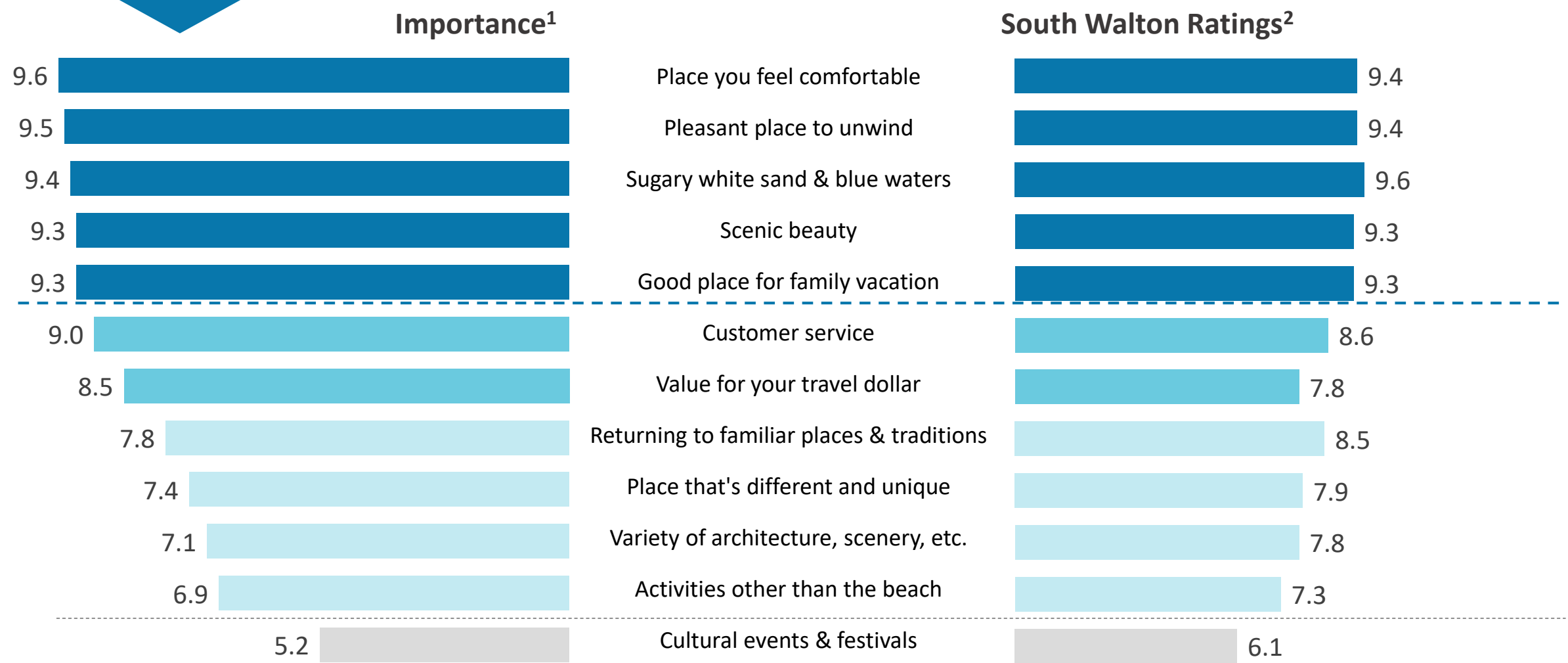


<sup>1</sup> 10 = Excellent; 1 = Poor

<sup>2</sup> About 3% of visitors will probably not return to South Walton because of the following reasons:

1. Too crowded 2. Too expensive 3. Traffic was a problem

# VACATION ATTRIBUTE IMPORTANCE VS. RATINGS



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

<sup>2</sup> Rated on a scale from 1 to 10 where 10 is excellent and 1 is poor.

# VISITOR DESCRIPTIONS OF SOUTH WALTON

Great place to visit **70%**

“It is our happy place. A variety of things to do or just the perfect place to go and relax. A great time to make memories with family. When you leave you can't wait for next year and within a month back we are on the website planning for the next year!”

Beautiful beaches **61%**

“The area has the best beaches and best water in the southeastern U.S. I love how there are a bunch of different little communities within which you can stay/visit. The bike trails along 30A help you and your family stay active and enjoy the scenery while on vacation.”

Relaxing **25%**

“Such a laid back and easygoing culture. It's easy to walk to restaurants and is super family friendly. Great food and just really great people. The beaches are gorgeous, and you really can't ask for more.”

# EMOTIONS ASSOCIATED WITH SOUTH WALTON\*



\*Coded verbatim responses; multiple responses permitted.



# YEARLY COMPARISONS

# VISITOR PROFILE – SUMMER 2019 VS. 2020

Visitor Metrics <sup>1</sup>	Summer 2019	Summer 2020
Travel party	5.4	5.0
Kids <20	67%	65%
Median age	52	51
Estimated median household income	\$177,300	\$178,300 <sup>2</sup>
Stayed in condo/rental house	73%	68%
Drove	84%	86%
Nights spent	6.1	6.2
Direct expenditures (travel party for entire trip)	\$6,184	\$6,441
1 <sup>st</sup> time visitor	16%	10%
10+ visits to South Walton	37%	39%

<sup>1</sup> Visitors who stayed in paid accommodations for up to 30 nights.

<sup>2</sup> Estimated average household income = \$325,000

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# VISITOR PROFILE – SUMMER 2019 VS. 2020

Top Origin States	Summer 2019	Summer 2020
Georgia	12%	25%
Alabama	11%	16%
Texas	17%	12%
Tennessee	11%	9%
Florida	4%	8%
Origins - Regions	Summer 2019	Summer 2020
Southeast	74%	86%
Midwest	19%	10%
West	4%	3%
Northeast	2%	1%
International	1%	0%

# VISITOR PROFILE – SUMMER 2019 VS. 2020

Top Visitor Activities	Summer 2019	Summer 2020
Beach	96%	94%
Restaurants	92%	86%
Relax and unwind	88%	77%
Family time, reading, cooking, etc.	79%	66%
Shopping, antiques	75%	54%
Biking, running, etc.	40%	42%
Bars, nightclubs	25%	28%
Water sports such as boating, kayaking, paddle boarding	32%	26%
State parks	11%	18%
Art galleries, museums, cultural events	9%	15%
Special events	14%	15%
Golf or tennis	17%	13%
Attractions	24%	13%
Hiking, nature walks, bird watching, eco tours	12%	9%
Dune Lakes	7%	4%

# VISITOR PROFILE – SUMMER 2019 VS. 2020

Visitor Metrics	Summer 2019	Summer 2020
Will return to South Walton	96%	96%
Rating for overall experience <sup>1</sup>	9.2 <sup>1</sup>	9.0 <sup>1</sup>
Viewed Visitors Guide	19% <sup>2</sup>	32% <sup>2</sup>
Planned trip	4 – 6+ months out (52%)	4 – 6+ months out (47%)
Used VisitSouthWalton.com	17%	25%
Used 1 of 16 beaches' websites	34%	29%
Use the term "South Walton"	15%	32%

<sup>1</sup>10-point scale with 10=Excellent & 1=Poor.

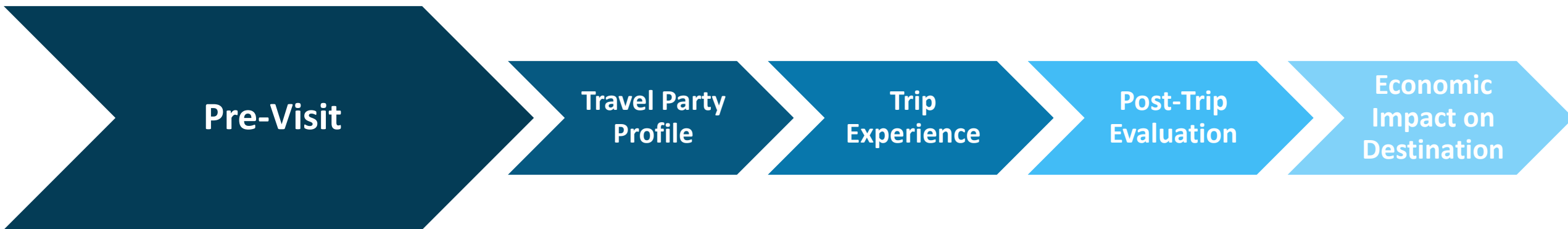
<sup>2</sup> 25% used the online version & 7% used the print version.



# DETAILED FINDINGS




# VISITOR JOURNEY: PRE-VISIT




# PLANNING CYCLE

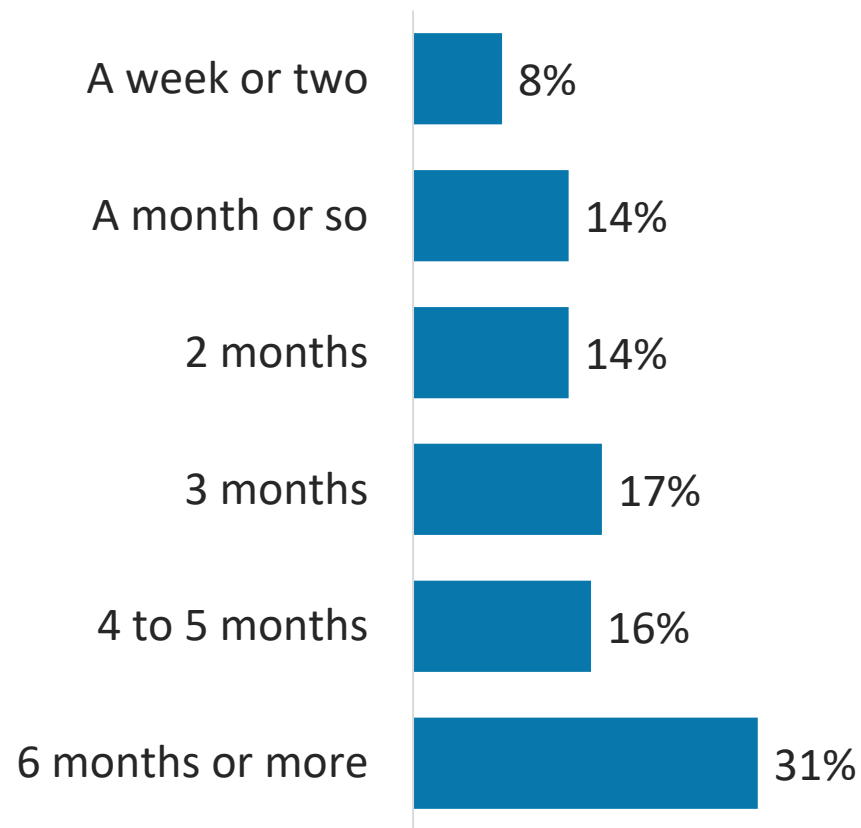
Despite COVID-19, visitors to South Walton continue to take a long-range approach when planning vacations. A trip to South Walton is an annual voyage for so many families that adverse circumstances do not deter them from keeping their scheduled visits.



Almost **1 in 2** visitors plan a Summer South Walton vacation at least **4 months out**.



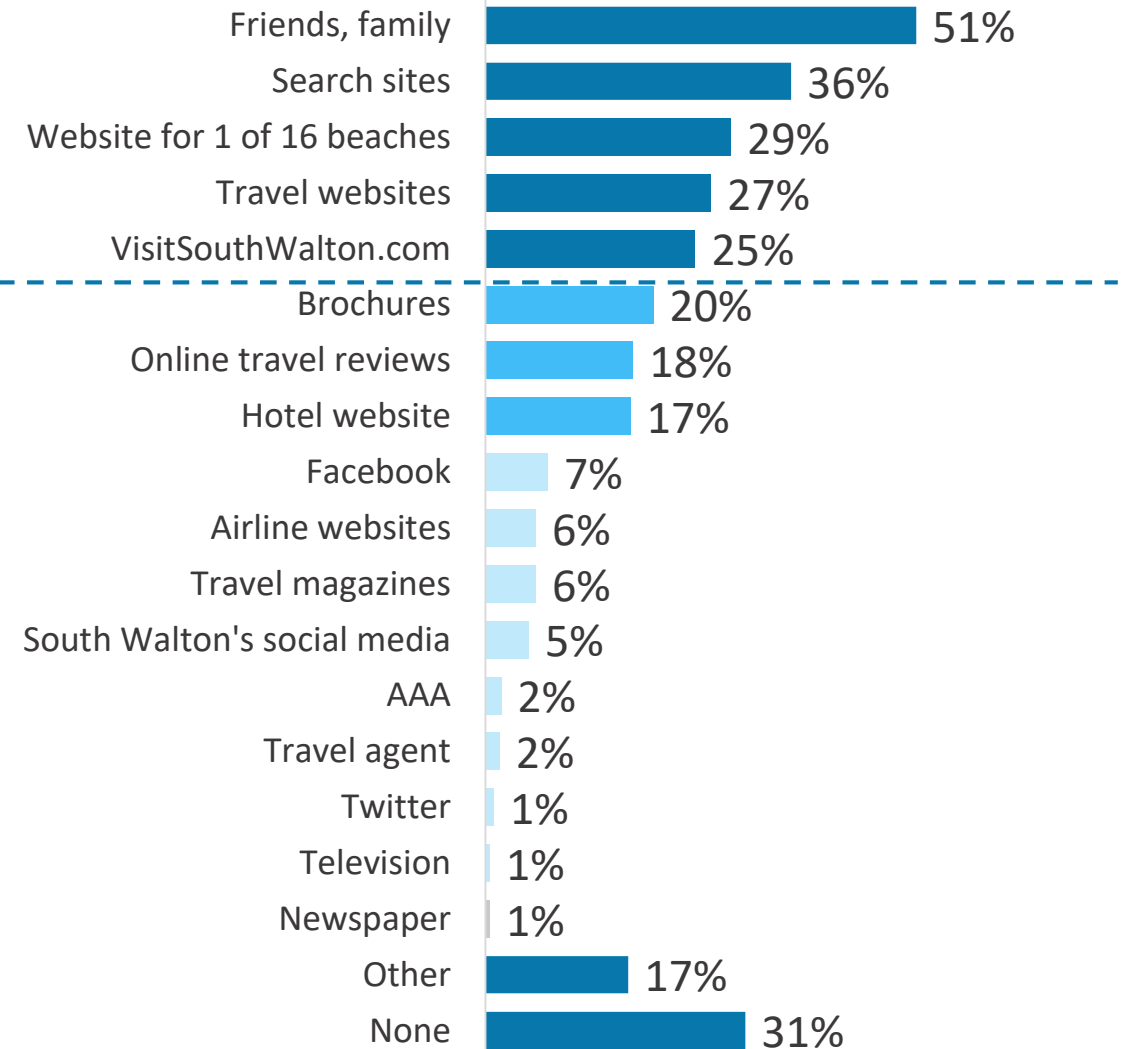
**1 in 5** visitors to South Walton have a short (a month or less) planning cycle.



# PLANNING SOURCES<sup>1</sup>

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

COVID-19 has enhanced use of DMOs' websites as visitors want to know what's happening on the ground. Use of VSW's website increased from 17% last year to **25%** this year.

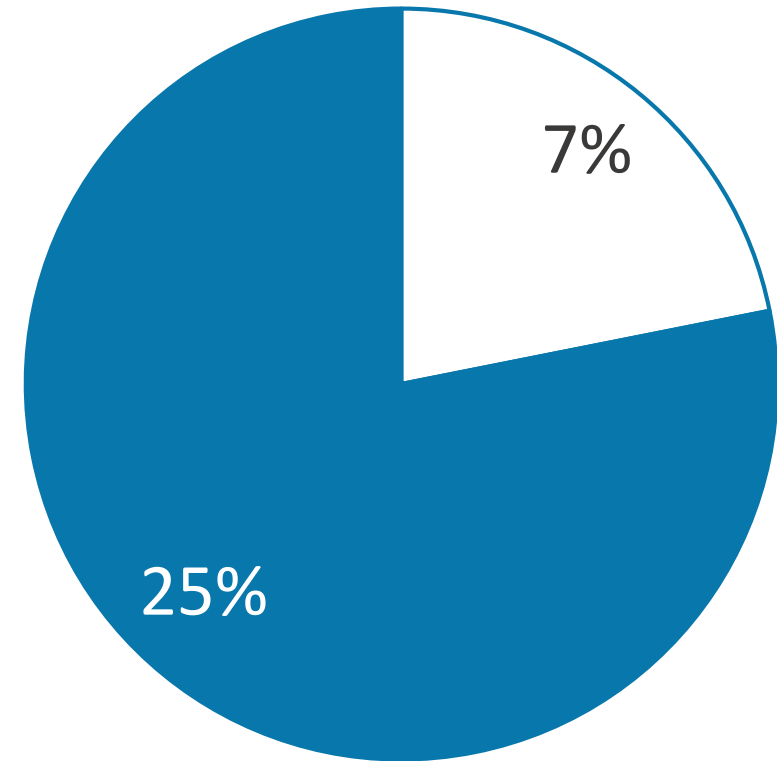


<sup>1</sup> Multiple responses permitted.

# SOUTH WALTON VISITOR GUIDE



**32%** of visitors viewed a South Walton Visitors Guide before going to South Walton.




☐ Print version    ☒ Online version


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



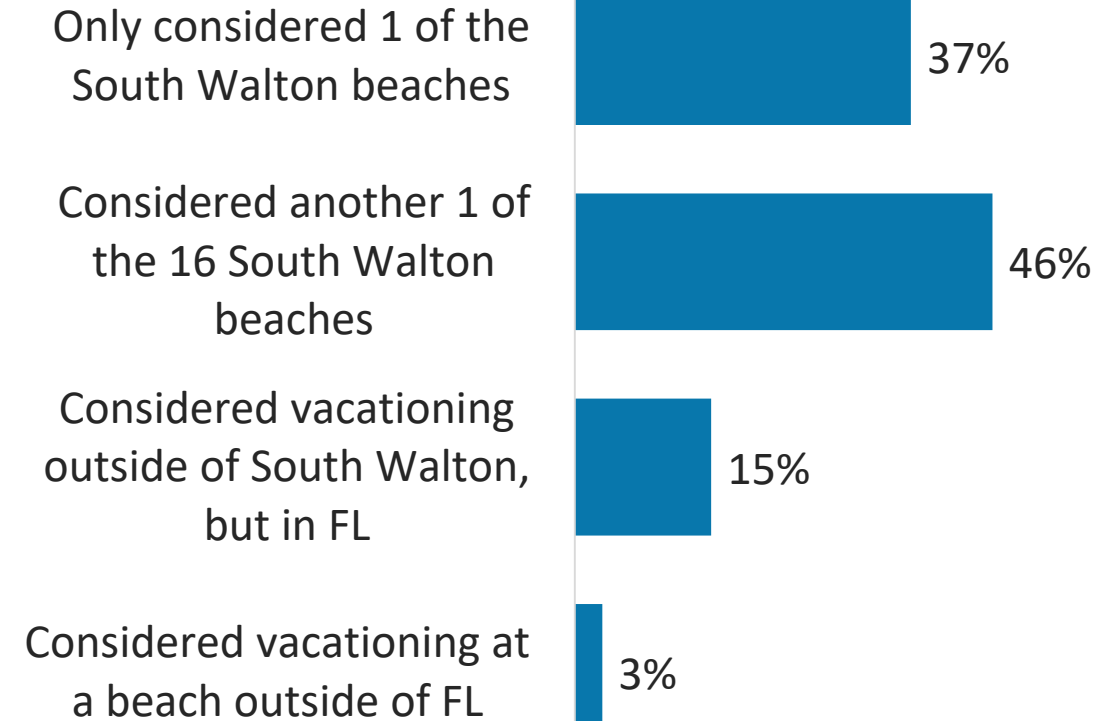
# OTHER DESTINATIONS CONSIDERED



Only **18%** of visitors considered vacationing at a beach outside of South Walton.

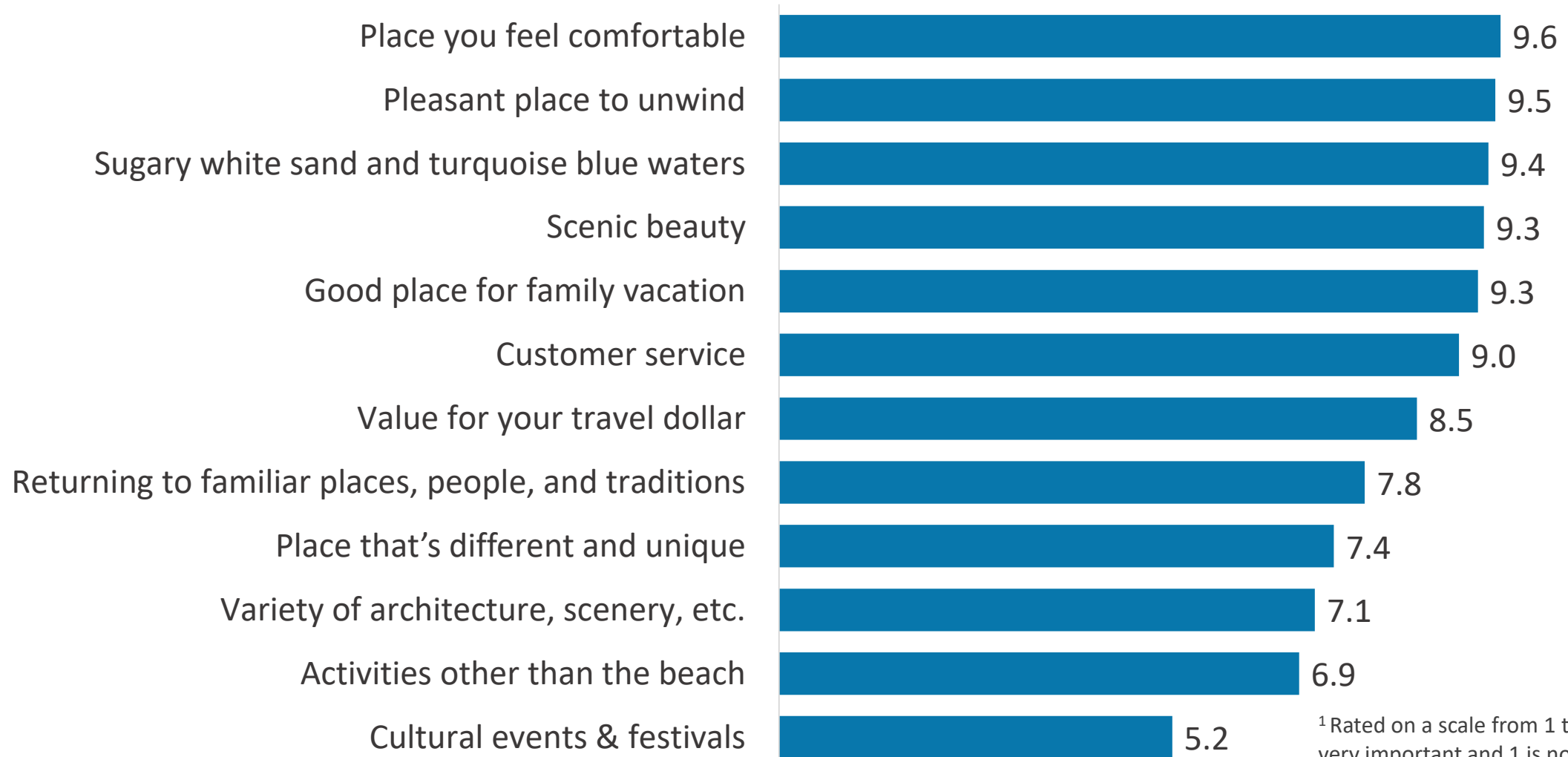


**32%** use the term “South Walton” when referring to the area.



# IMPORTANT VACATION DESTINATION ATTRIBUTES<sup>1</sup>

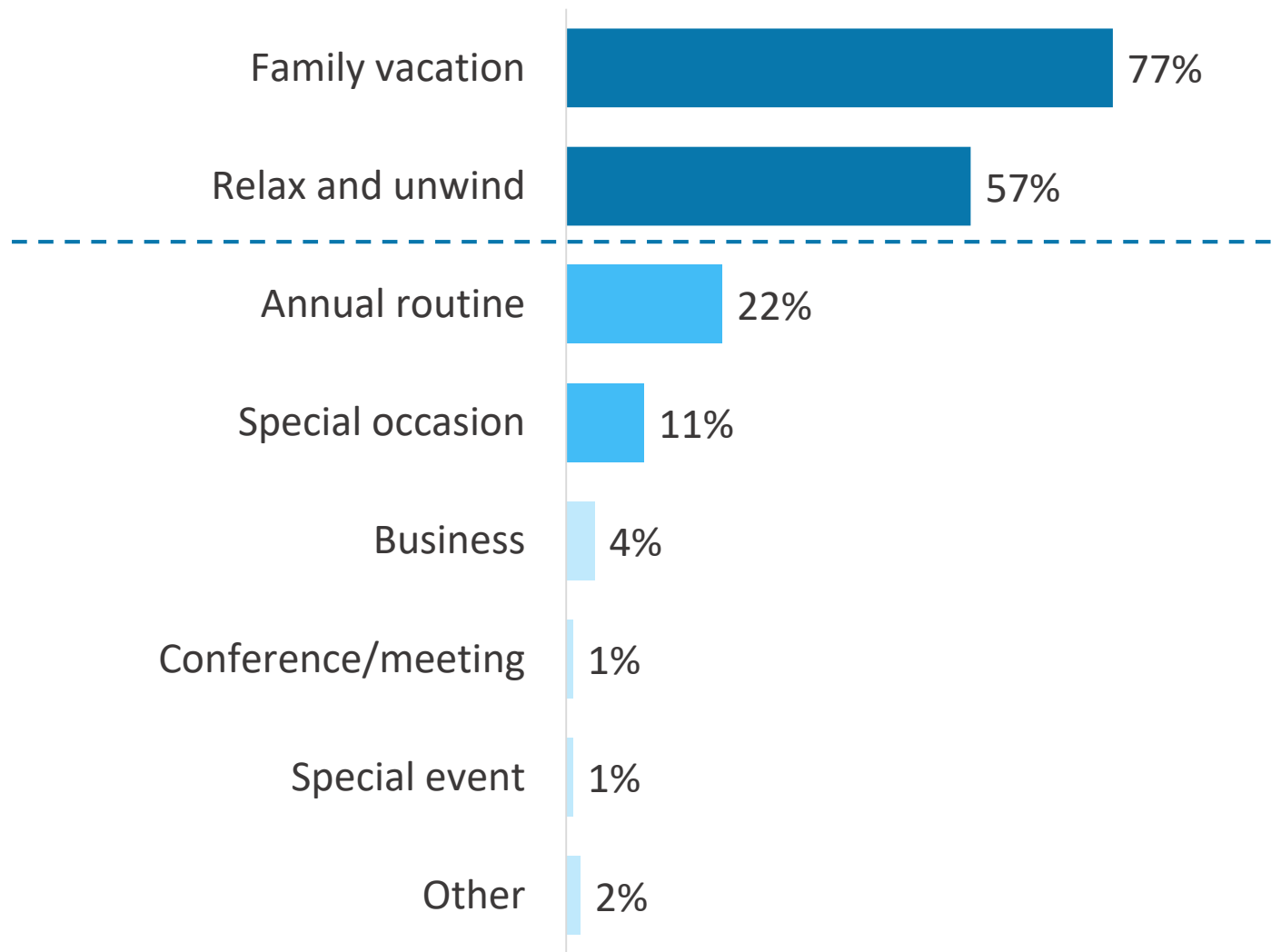
Order of attribute importance was unchanged from last summer.



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

# REASONS FOR VISITING<sup>1</sup>

Order of reasons for visiting were exactly the same as in 2019.



<sup>1</sup> Multiple responses permitted.

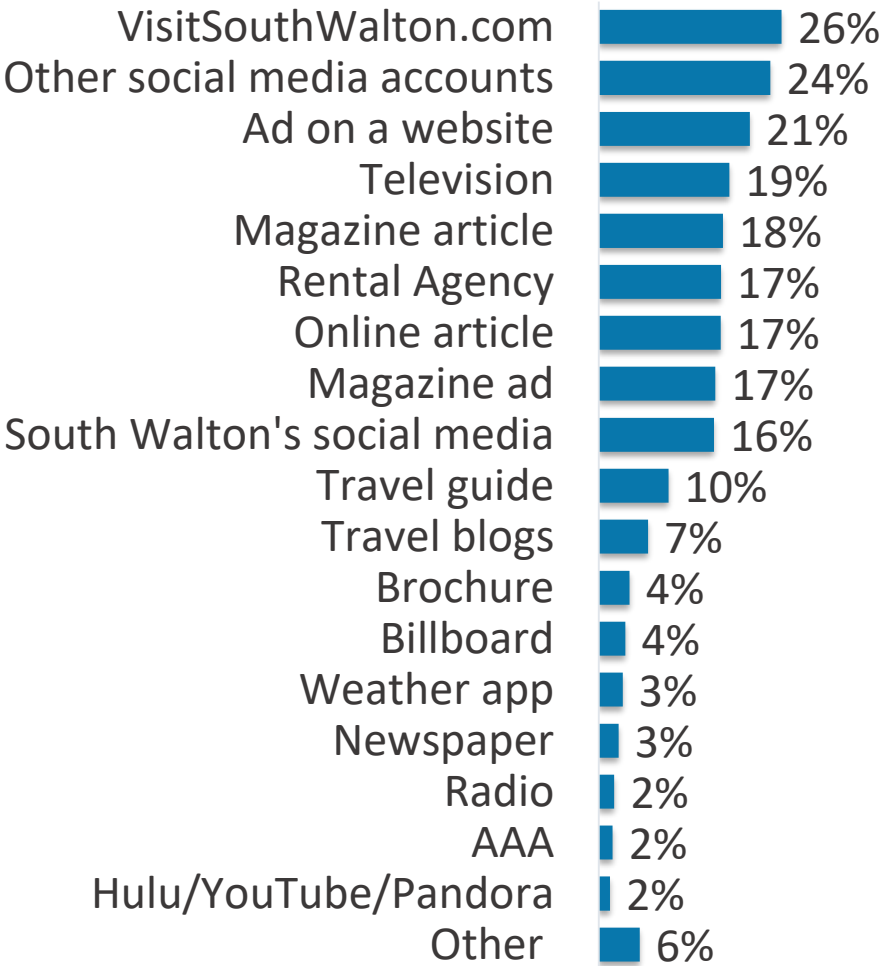
# SOUTH WALTON PROMOTIONS<sup>1</sup>



**27%** of Summer visitors have recently noticed promotions or travel stories about South Walton.

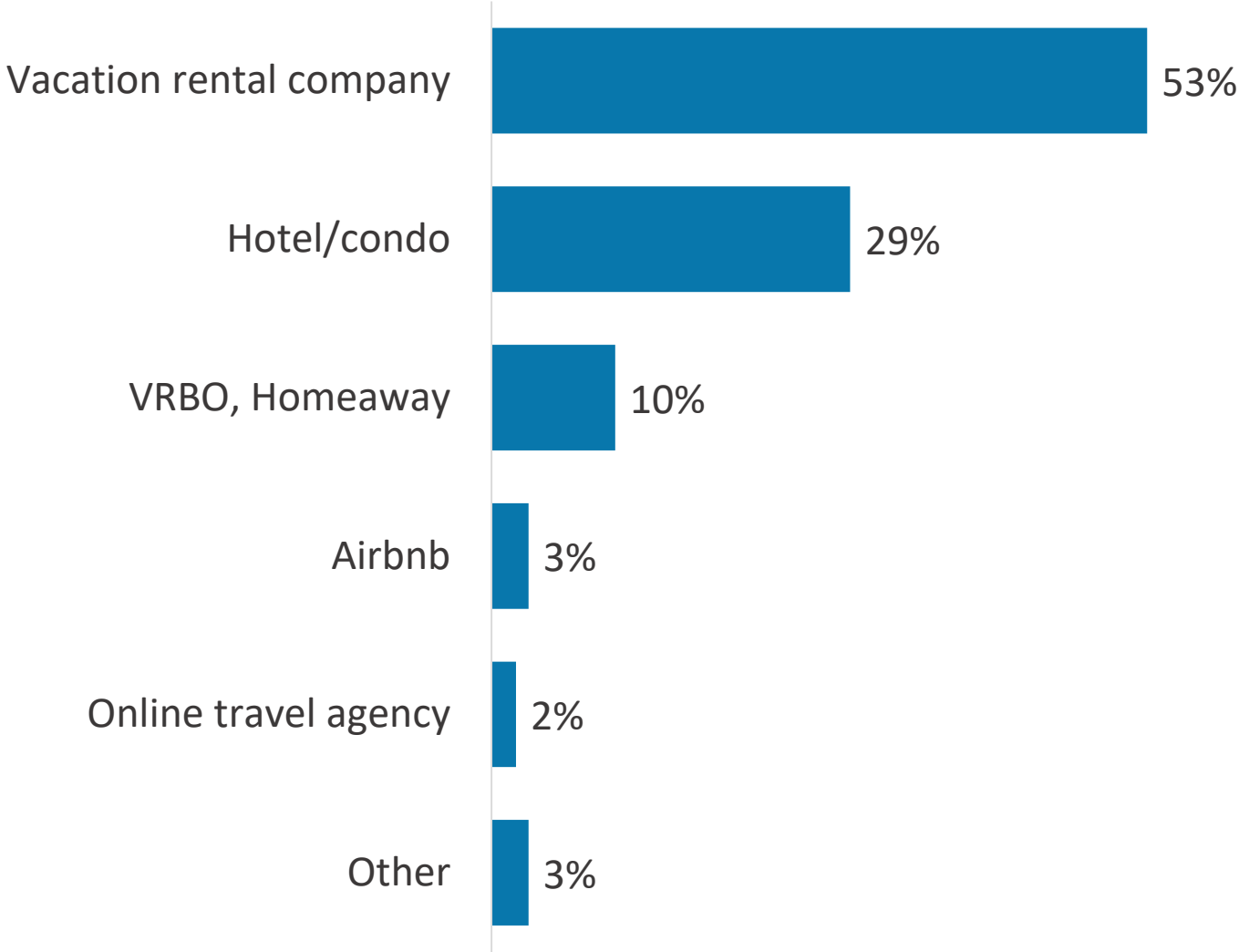


During COVID-19, consumers use destinations' websites more to check on restrictions, local ground rules, etc. VisitSouthWalton.com was the most often cited promotional vehicle.




<sup>1</sup> Multiple responses permitted.

# BOOKING ACCOMMODATIONS






# VISITOR TRANSPORTATION

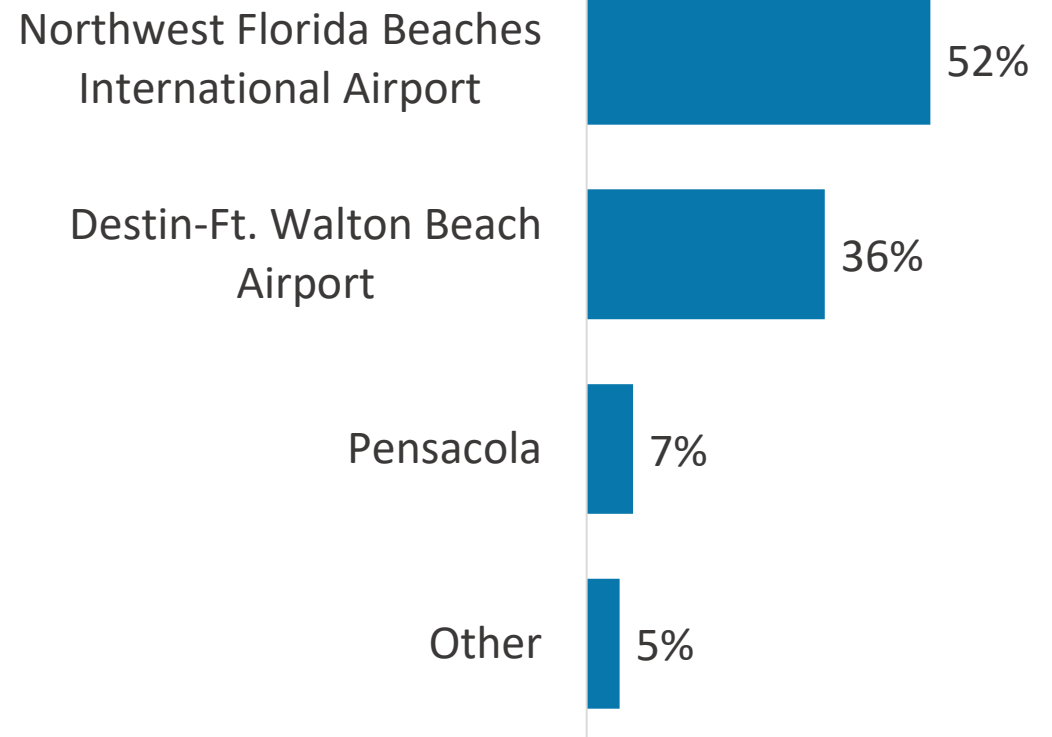


**86%** of Summer visitors drove to South Walton.



**33%** of those who drove were aware that there were direct flights from their city to the South Walton area.

**14%** who **flew** used the following airports:



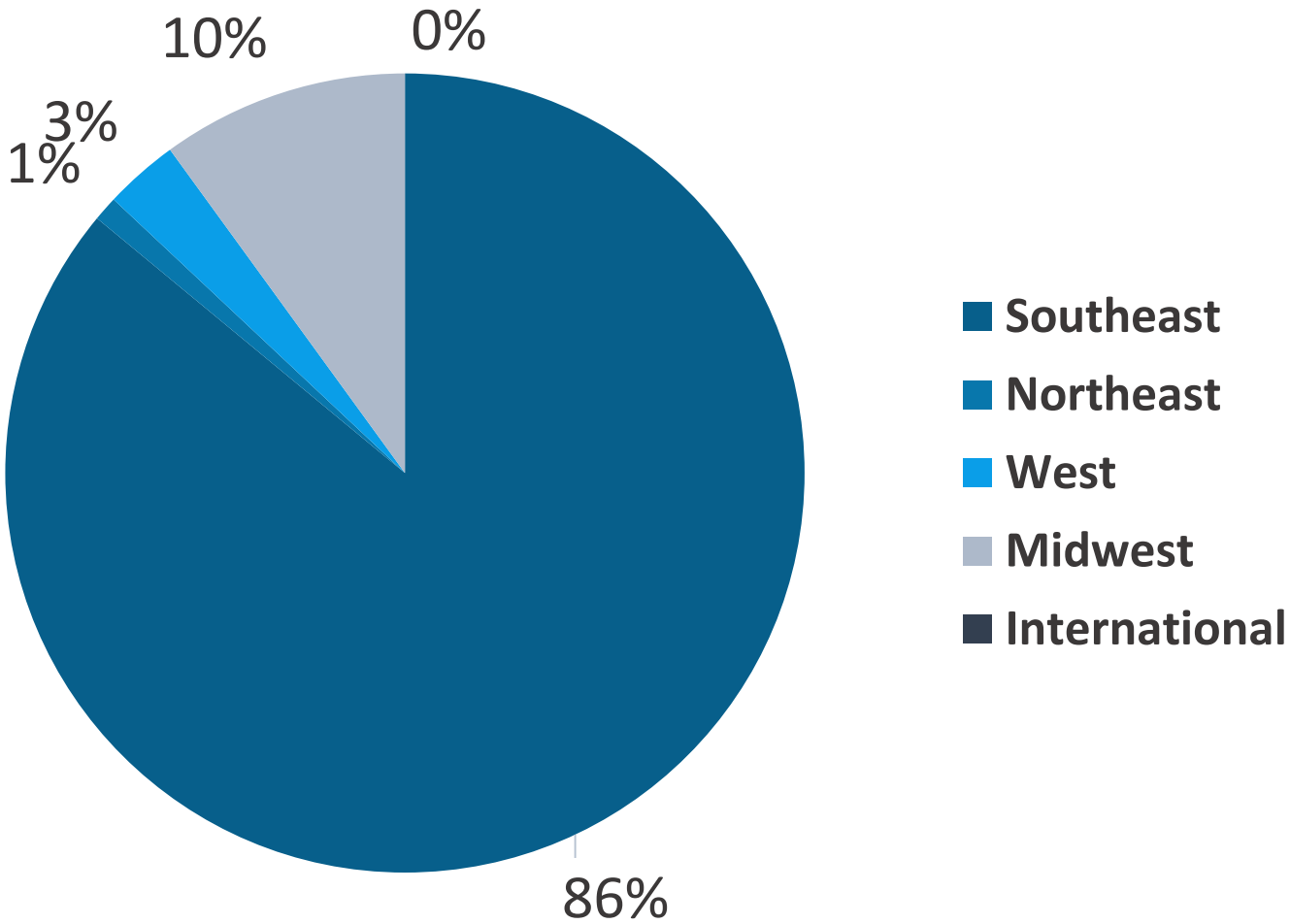
# VISITOR JOURNEY: TRAVEL PARTY PROFILE



# ORIGIN OF SUMMER VISITORS

% of visitors originating in Atlanta increased from 10% last summer to 23% this summer.

Top Origin Markets	% of Visitors
Atlanta	23%
Dallas-Ft. Worth	6%
Birmingham	6%
Pensacola-Mobile	6%
Nashville	5%
Houston	4%
New Orleans	4%
Memphis	3%
Montgomery	2%
St. Louis	2%
Jackson	2%
Cincinnati	1%
Dothan	1%
Chicago	1%
Panama City – Destin	1%
Louisville	1%
Baton Rouge	1%



<sup>1</sup> The metro area of St. Louis includes some parts of Missouri and Illinois.

# ORIGIN OF SUMMER VISITORS

Influenced by COVID-19, 1 in 4 visitors in summer 2020 hailed from Georgia vs. 12% in summer 2019.

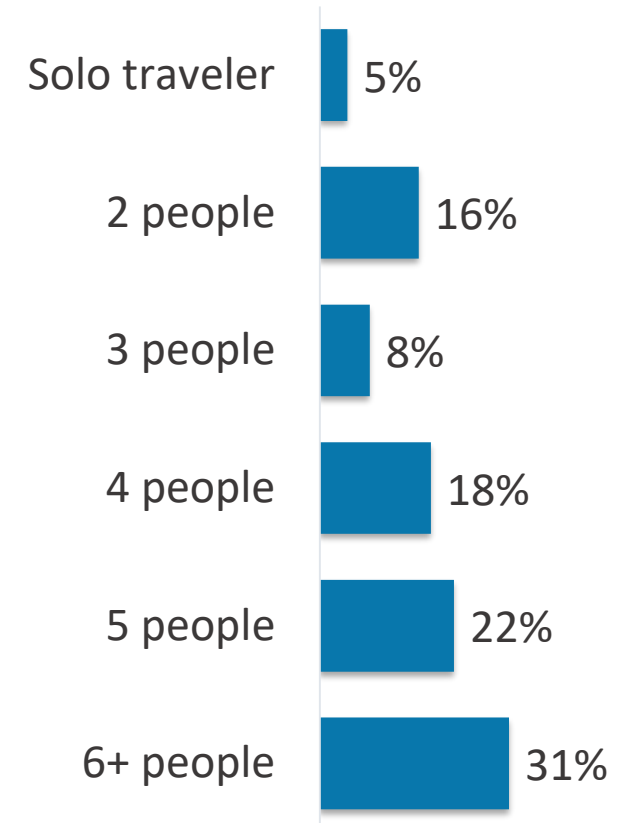
State	Percentage of Visitors
Georgia	25%
Alabama	16%
Texas	12%
Tennessee	9%
Florida	8%
Louisiana	6%
Mississippi	4%
Missouri	3%
Kentucky	2%
Arkansas	2%
Ohio	2%
Oklahoma	2%



# TRAVEL PARTY SIZE AND COMPOSITION

Visitors traveled in a party composed of **5** people.

**65%** of visitors traveled with children under the age of 18.



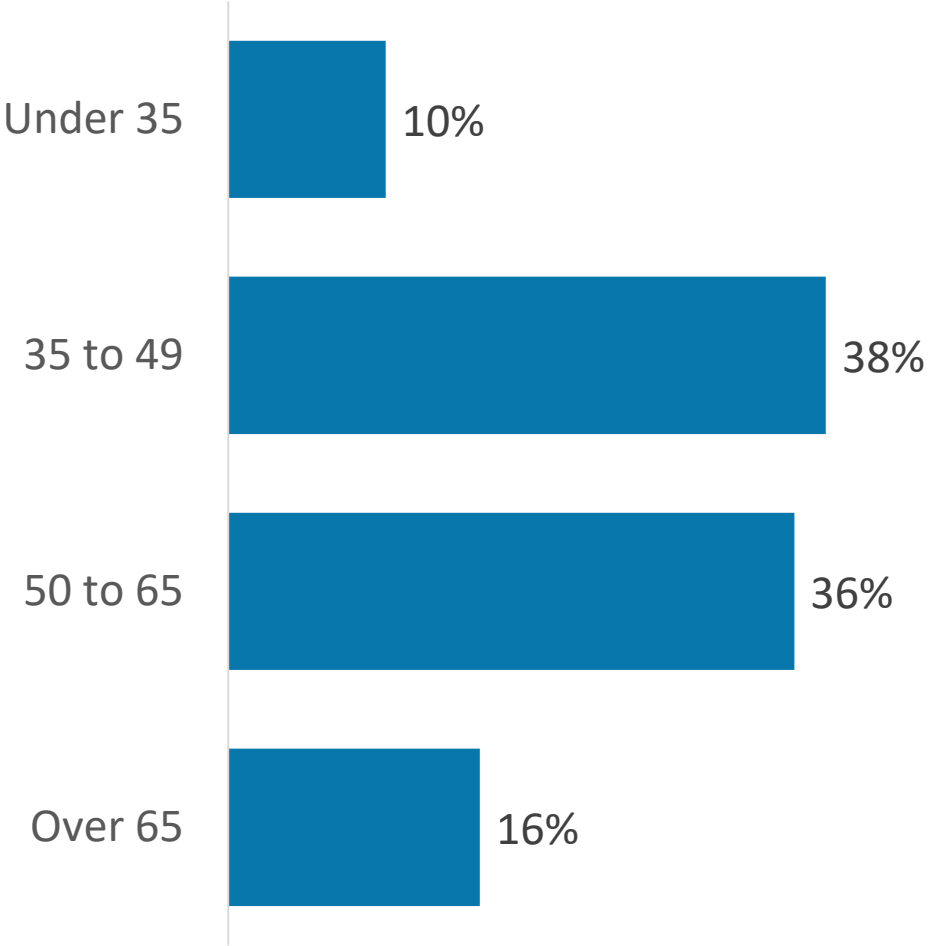
<sup>1</sup>Multiple responses permitted.



# AGE OF SUMMER VISITORS



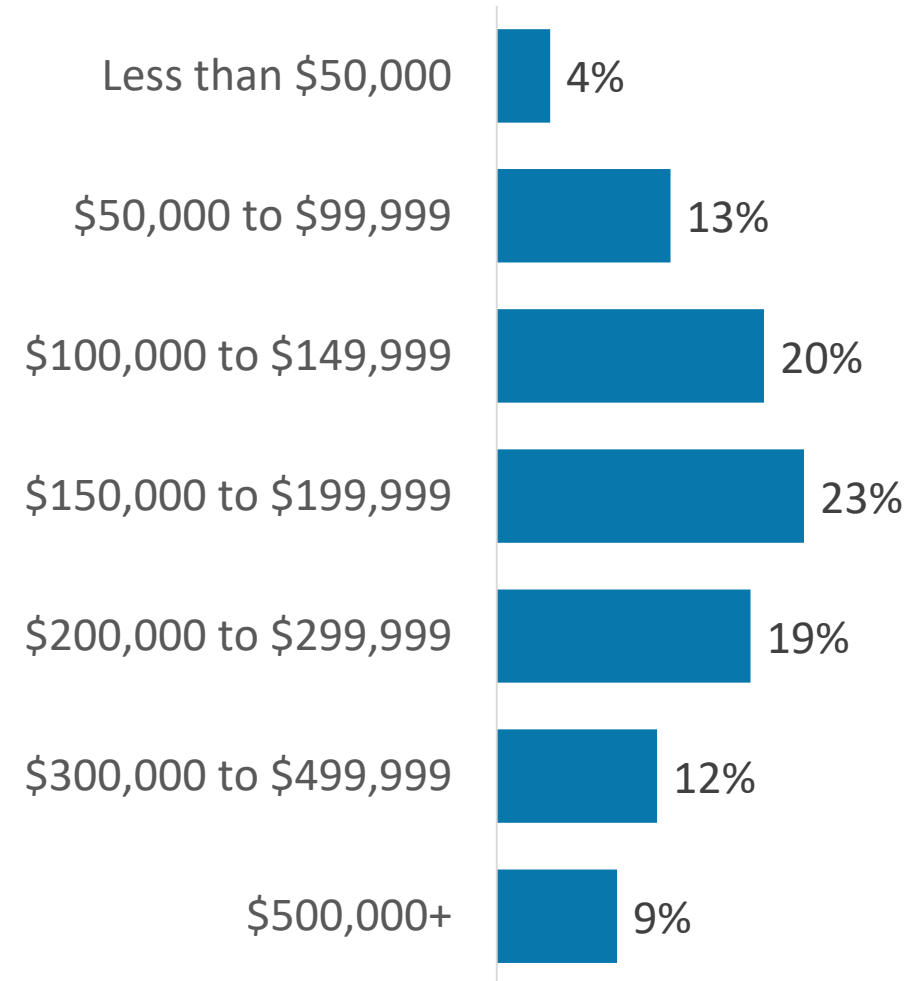
Median age of Summer visitors was **51 years old.**



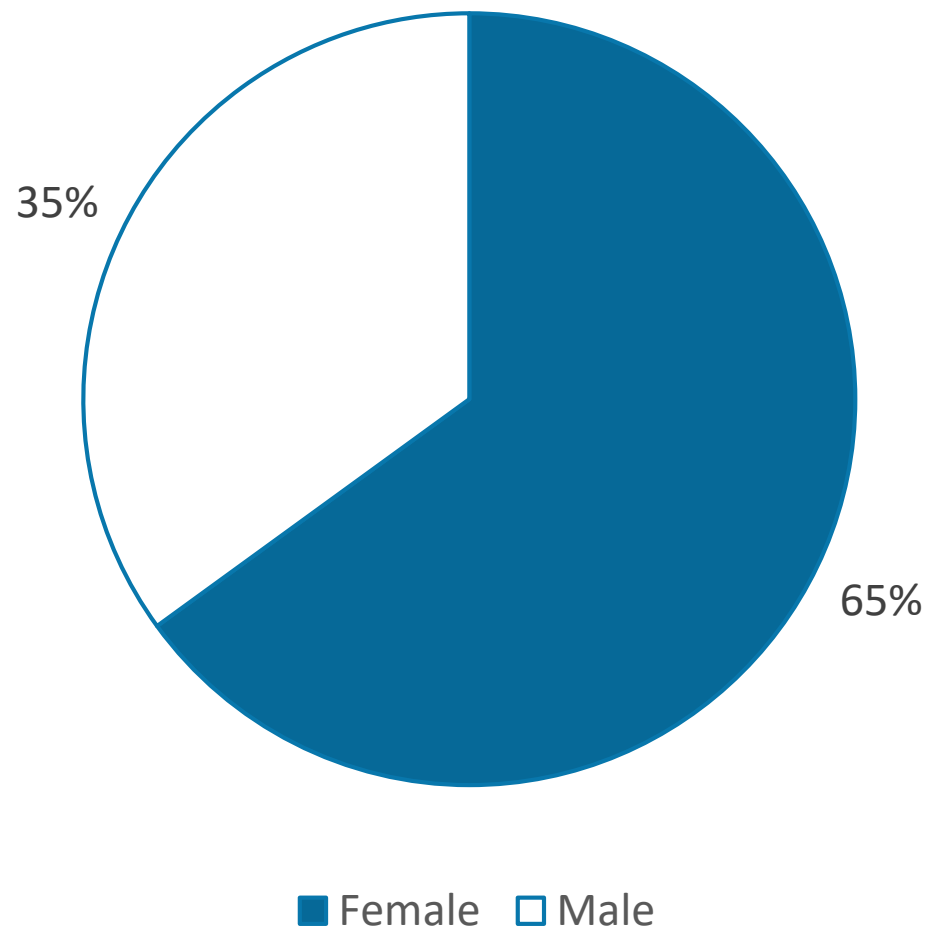
# TOTAL HOUSEHOLD INCOME IN 2018

Summer visitors had a **median** household income of **\$178,300**.

Summer visitors had an estimated **average** household income of **\$325,000**.

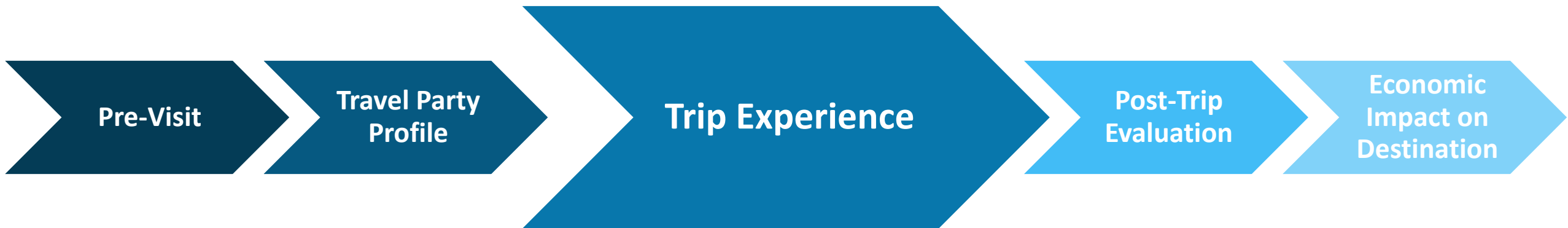


# GENDER

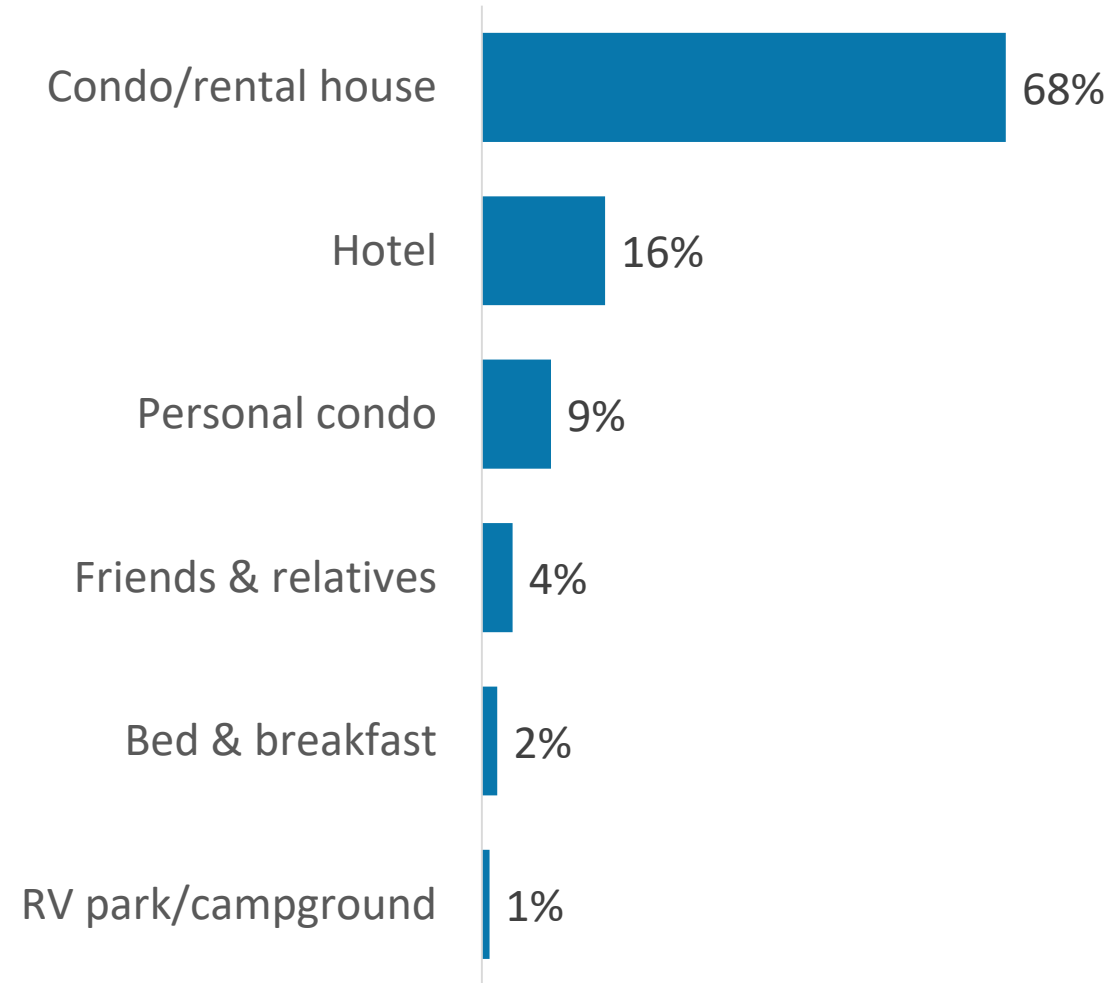


Responses impacted by person more willing to be interviewed.  
59

# VISITOR JOURNEY: TRIP EXPERIENCE



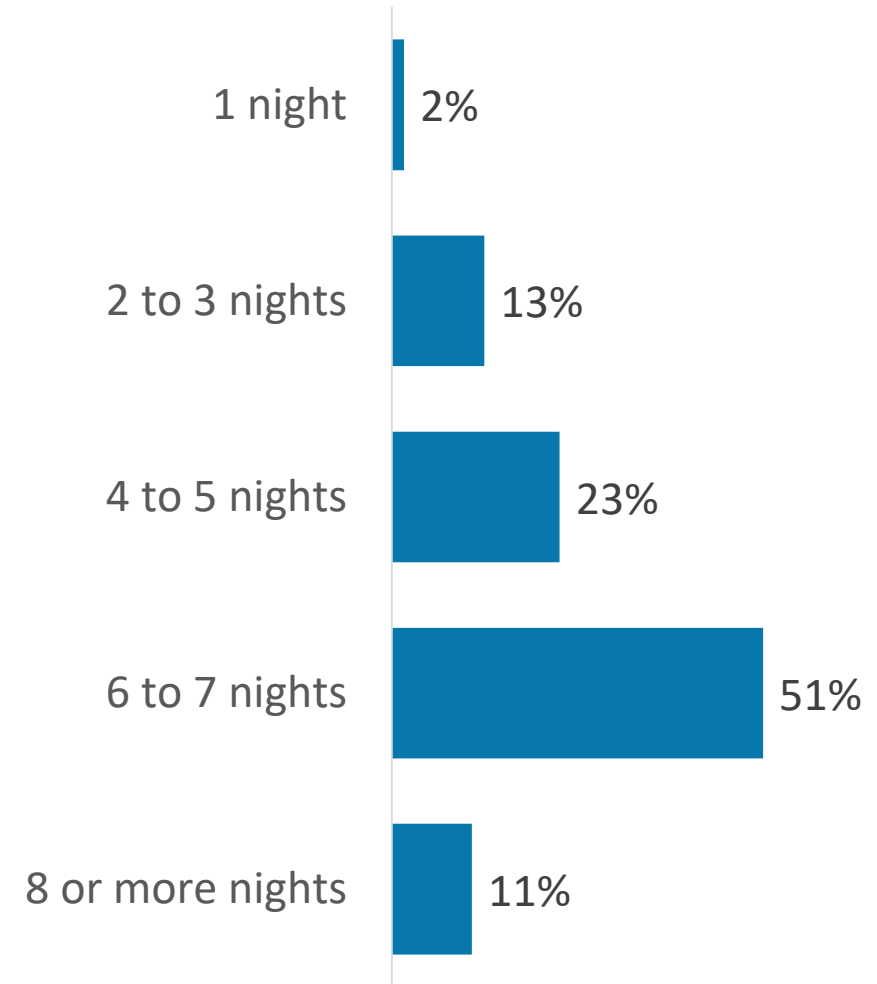
# VISITORS' ACCOMMODATIONS





# LENGTH OF STAY

Summer visitors spent an average of **6.2** nights in South Walton.

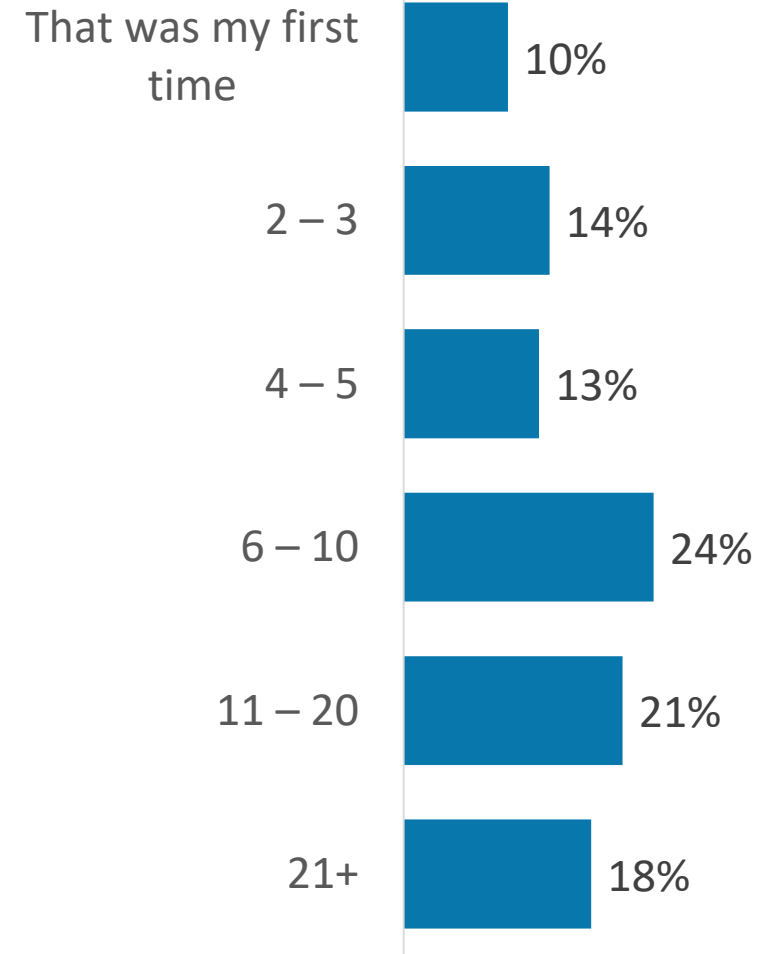


<sup>1</sup>Visitors who stayed in paid accommodations up to 30 nights.

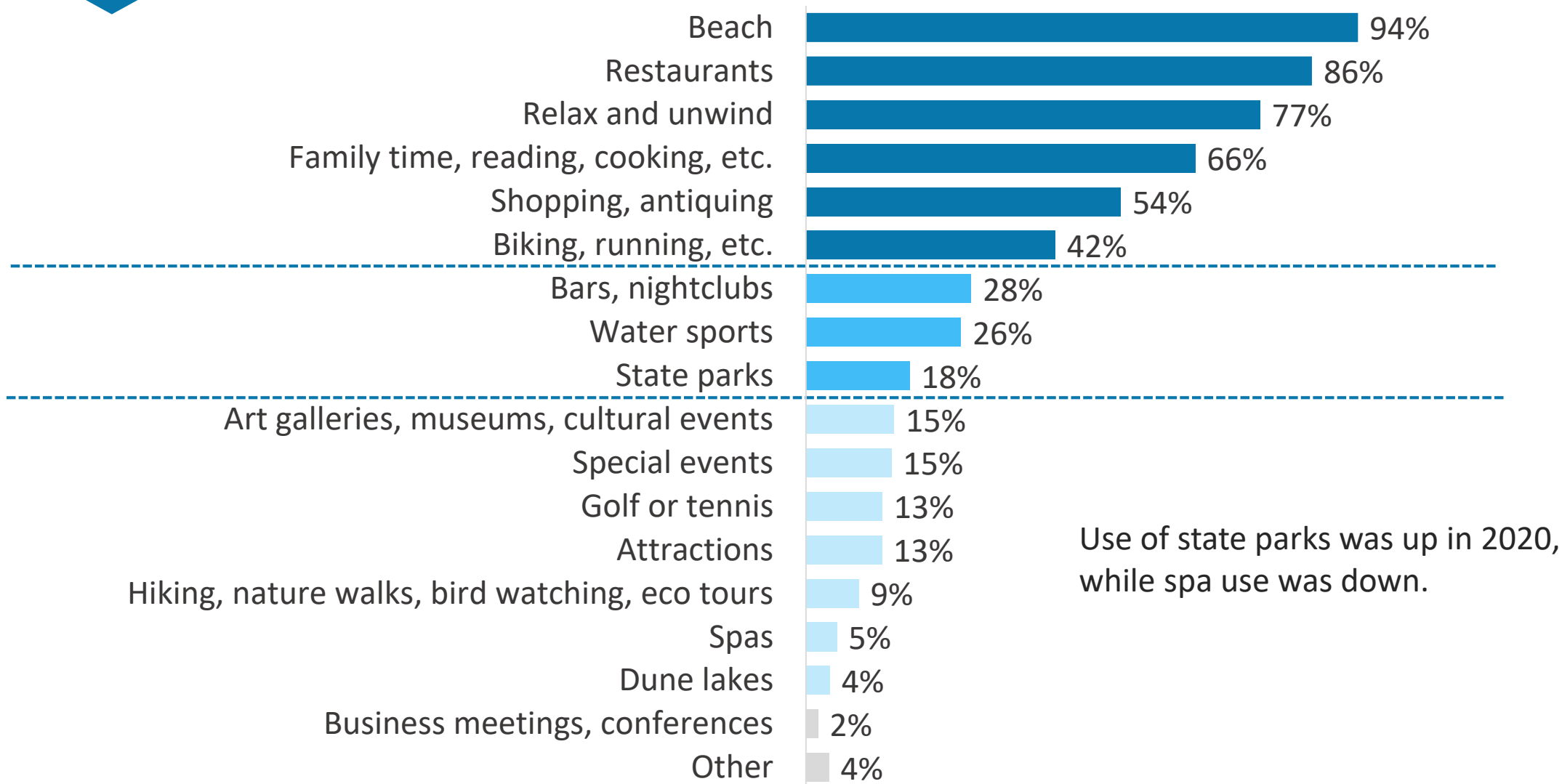
# FIRST TIME AND EXPERIENCED VISITORS

**10%** of Summer visitors were visiting for the first time, this is down slightly from 16% in 2019.

Almost **2 in 5** Summer visitors have visited South Walton more than 10 times.



# VISITOR ACTIVITIES<sup>1</sup>



<sup>1</sup>Multiple responses permitted.

# TYPICAL SOUTH WALTON TRAVEL PARTY EXPENSES<sup>1</sup>

Visitor Metrics <sup>1</sup>	Average Daily Expenditure	Total Trip Expenditure
Accommodations	\$465	\$2,883
Restaurants	\$191	\$1,184
Groceries	\$71	\$440
Shopping	\$146	\$905
Entertainment	\$64	\$397
Transportation	\$65	\$403
Other	\$37	\$229
Total	\$1,039	\$6,441

<sup>1</sup>For visitors staying 30 days or fewer

<sup>2</sup>This 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

Summer visitors gave South Walton a rating of **9.0**<sup>1</sup>.

**96%** will return to South Walton.<sup>2</sup>

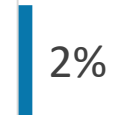
Definitely will return



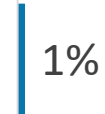
Probably will return



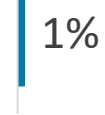
Probably will not return



Definitely will not return



Don't know



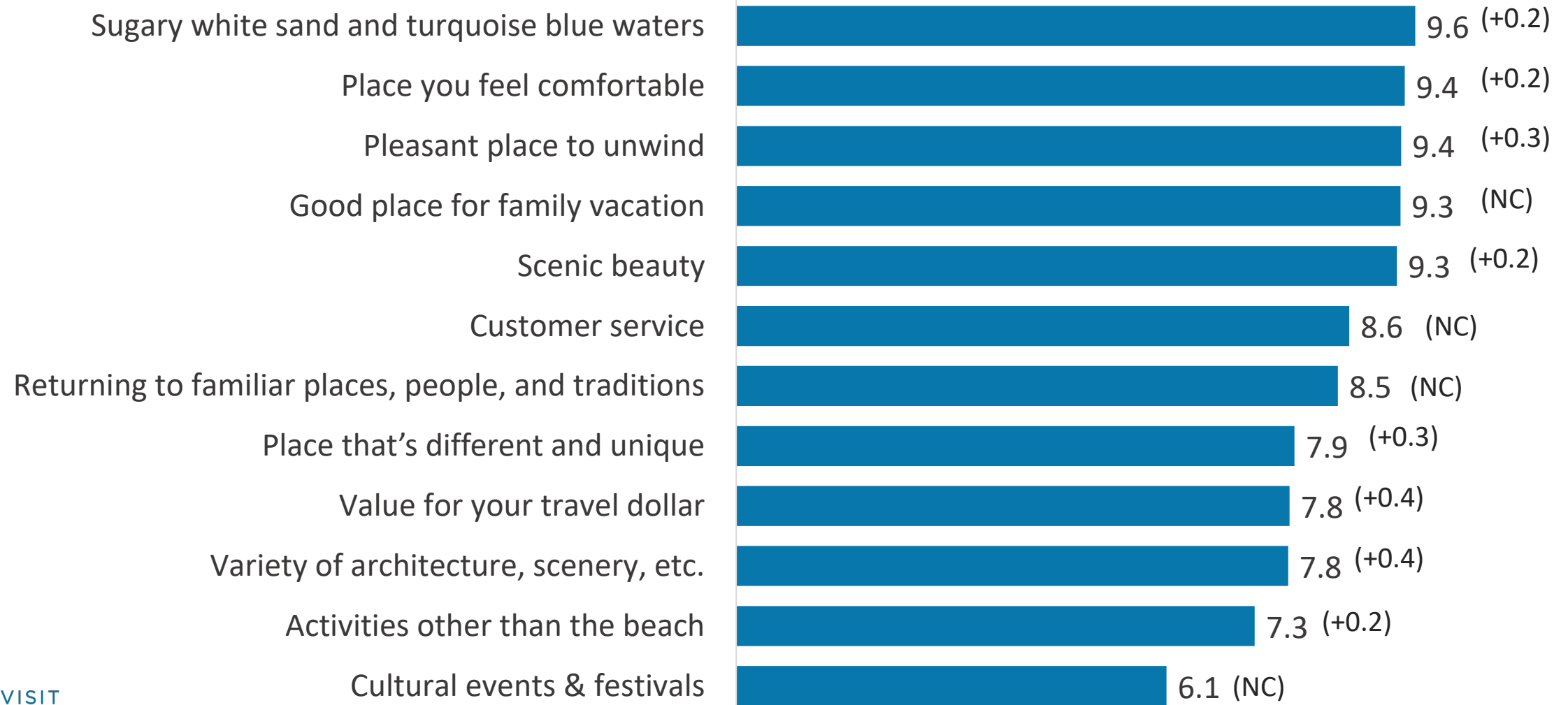
<sup>1</sup>10 = Excellent; 1 = Poor

<sup>2</sup> 3% of all visitors will not return to South Walton for the following reasons:

1. Too crowded 2. Too expensive 3. Traffic was a problem

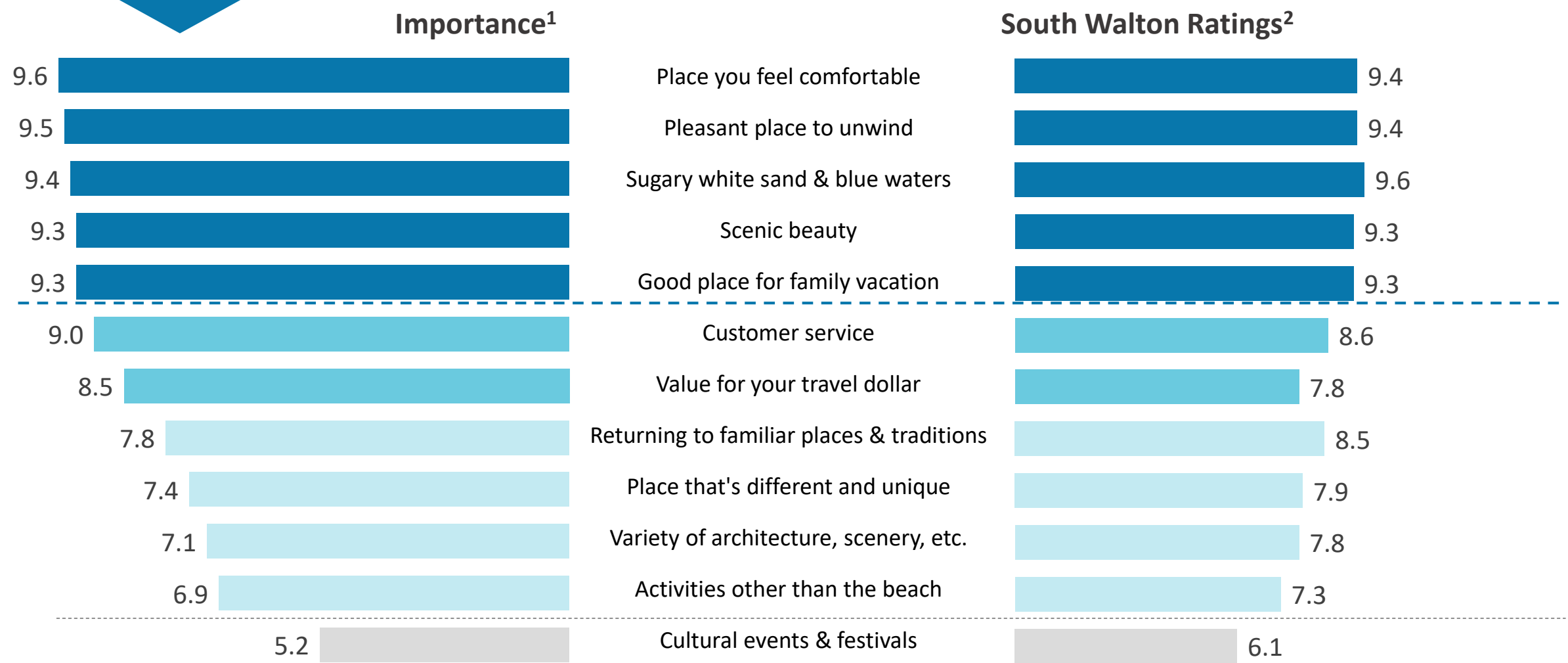
# RATING SOUTH WALTON<sup>1</sup>

Ratings on many attributes went up since 2019 – COVID-19 Effect? (change in parentheses)



<sup>1</sup>Rated on a scale from 1 to 10 where 1 is poor and 10 is excellent.

# VACATION ATTRIBUTE IMPORTANCE VS. RATINGS

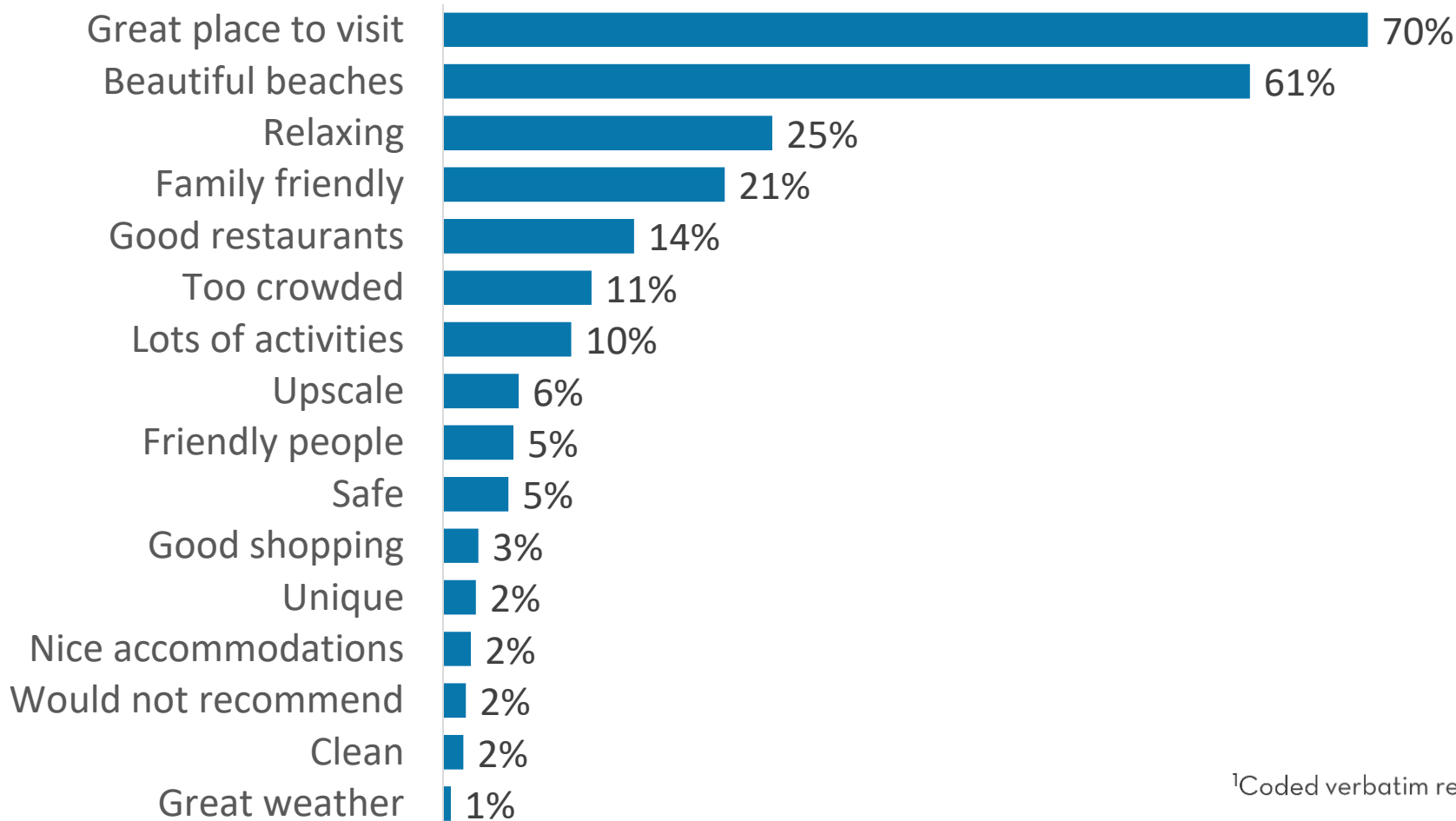


<sup>1</sup> Rated on a scale from 1 to 10 where 10 is very important and 1 is not at all important.

<sup>2</sup> Rated on a scale from 1 to 10 where 10 is excellent and 1 is poor.

# VISITOR DESCRIPTIONS OF SOUTH WALTON<sup>1</sup>

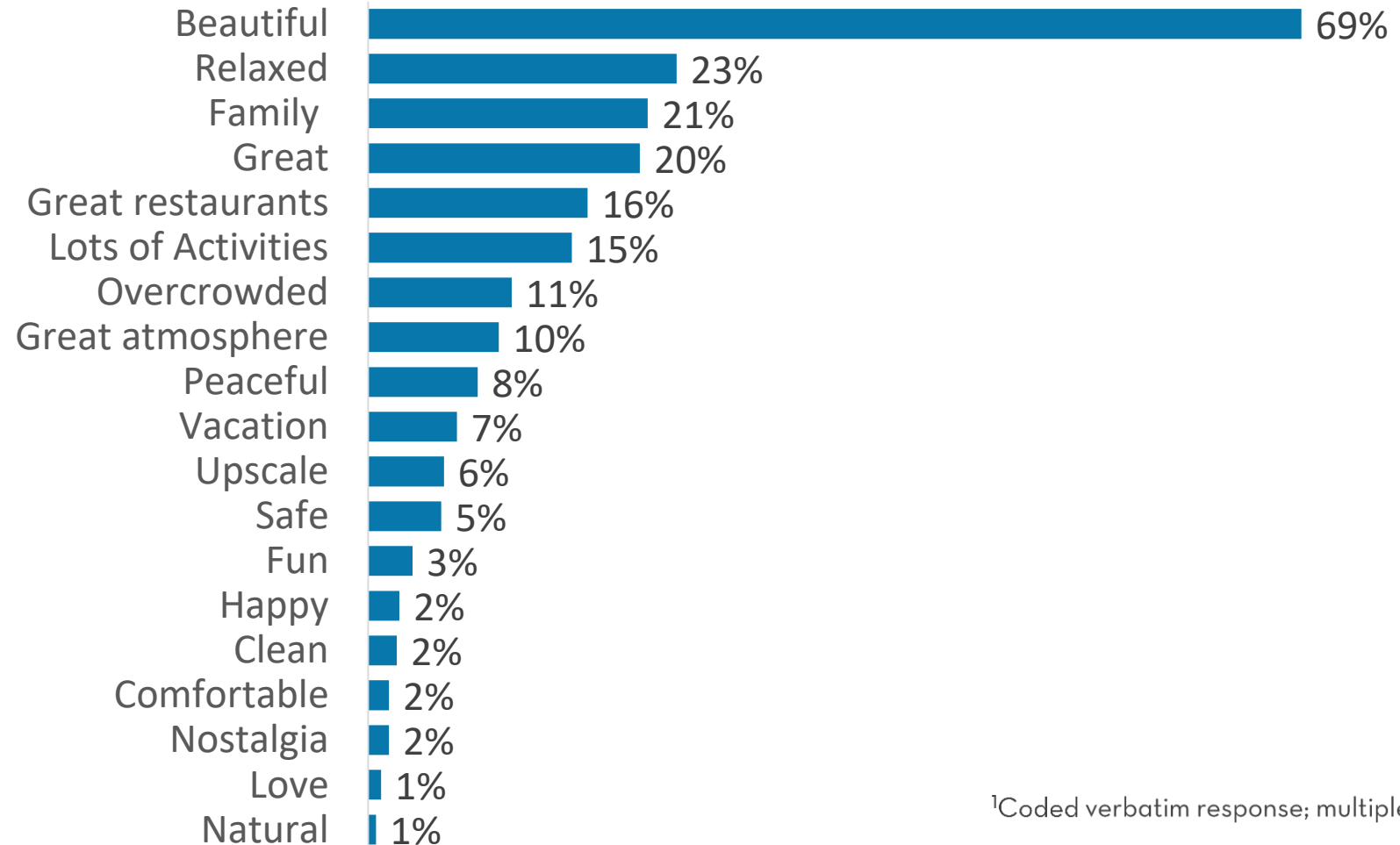
In an open-ended question, visitors offered more positive than negative descriptors by a 17 to 1 ratio. “Safe,” as a descriptor increased from 2% last year to 5% this year. Conversely, “crowded” increased from 8% last year to 11% this year.



<sup>1</sup>Coded verbatim response; multiple responses permitted.

# EMOTIONS ASSOCIATED WITH SOUTH WALTON<sup>1</sup>

“Beautiful” was mentioned much more frequently this year as people sought refuge from their home environments. “Relaxed” decreased this year – perhaps there was some COVID-19 related tension.



<sup>1</sup>Coded verbatim response; multiple responses permitted.

# STUDY OBJECTIVES: ECONOMIC IMPACT





# ECONOMIC IMPACT – SUMMER 2019 VS. 2020

A 6.7% increase in active units from Summer 2019 to Summer 2020, increases in occupancy and ADR, and an increase in TDT rate from 4% to 5% led to an increase in summer TDT of 36.8%.

South Walton may have the brightest tourism figures in the nation during COVID-19 as number of visitors, room nights and RevPAR were all up more than 10%.

With nearly 2.5 million summer visitors, total economic impact during summer 2020 was nearly \$2.4 billion.

Property Statistics	Summer 2019	Summer 2020	% Change
Room nights	1,046,108	1,152,811	+10.2%
Total visitors	2,191,600	2,428,300	+10.8%
TDT collections	\$13,966,563	\$19,106,264 <sup>1</sup>	+36.8% <sup>1</sup>
Direct spending	\$1,410,662,800	\$1,609,378,100	+14.1%
Economic impact	\$2,087,780,900	\$2,381,879,600	+14.1%
Occupancy	76.2% <sup>2</sup>	80.3%	+5.4%
Room rates	\$418.97 <sup>2</sup>	\$438.06	+4.6%
RevPAR	\$319.26 <sup>2</sup>	\$351.76	+10.2%

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

<sup>1</sup> 2020 tax rate is 4.5% compared to 4% in 2019. At the 4% level, summer 2020 TDT collections exceeded 2019 collections by 9.6%.

<sup>2</sup> Adjusted to reflect more reliance on Key Data.

# VISIT SOUTH WALTON

## Visitor Tracking Study

### Summer 2020



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