

VISIT SOUTH WALTON

Visitor Tracking Study

Fall 2020



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STUDY OBJECTIVES: MAP THE VISITOR JOURNEY



Visitor Tracking Study

Visitor tracking is completed through internet surveys and in-person interviewing in public areas in South Walton, including beaches, towns and events.

This report is based on interviews¹ with 741 Fall visitors who traveled to South Walton between September and November 2020.

¹Interviews 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. 177 interviews were conducted via face-to-face interviews along the beach and in public areas.

EXECUTIVE SUMMARY



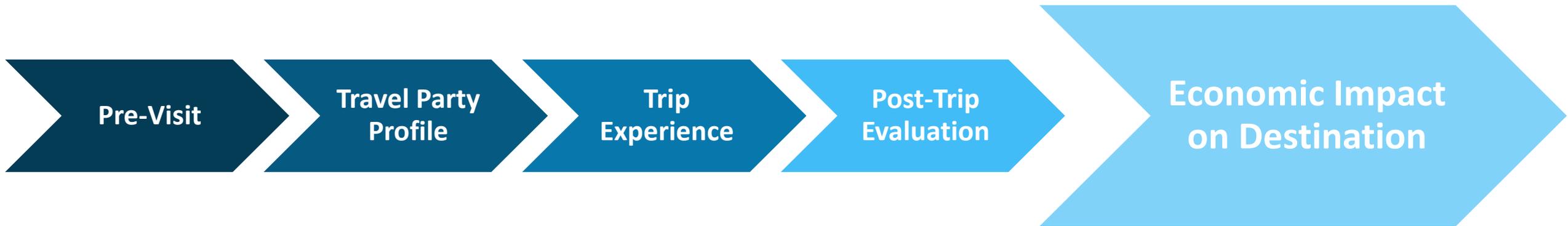
VISITOR JOURNEY: ECONOMIC IMPACT

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 – FALL 2019 VS. 2020

A 7.1% increase in active units from Fall 2019 to Fall 2020, increases in occupancy and ADR, and an increase in TDT rate from 4% to 5% led to an increase in Fall TDT of 104.1%.¹

South Walton continues to see increased tourism figures into the fall, despite the COVID-19 crisis, as number of visitors, room nights and RevPAR were all up more than 27%.

With nearly 804,000 fall visitors, total economic impact during fall 2020 was over \$1.27 billion.

Property Statistics	Fall 2019	Fall 2020	% Change
Room nights	540,900	709,753	+31.2%
Total visitors	620,500	803,900	+29.6%
TDT collections	\$4,306,778	\$8,844,768 ¹	+104.1% ¹
Direct spending	\$633,035,600	\$861,147,800	+36.0%
Economic impact	\$936,892,700	\$1,274,498,700	+36.0%
Occupancy	41.9%	49.9%	+19.1%
Room rates	\$254.48	\$273.18	+7.3%
RevPAR	\$106.63	\$136.32	+27.8%

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

¹ 2020 tax rate is 5% compared to 4% in 2019. At the 4% level, fall 2020 TDT collections exceeded 2019 collections by 63%.

ECONOMIC IMPACT - LODGING STATISTICS

49.9%

Occupancy

↑ 19.1%

\$273.18

ADR

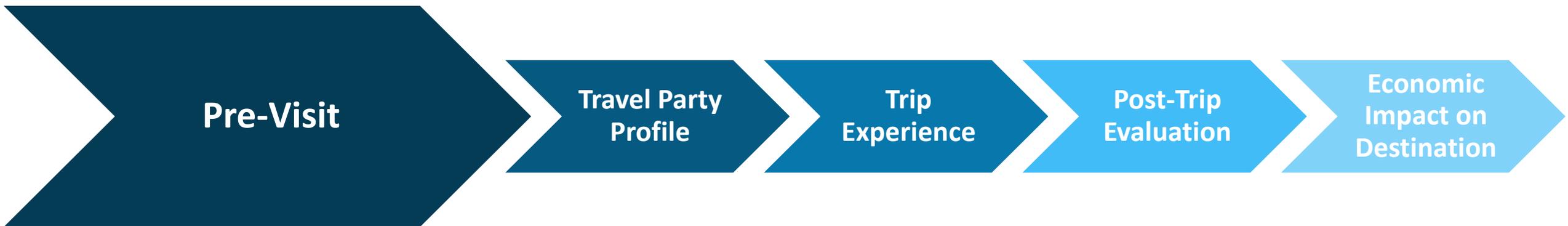
↑ 7.3%

\$136.32

RevPAR

↑ 27.8%

VISITOR JOURNEY: PRE-VISIT



PLANNING CYCLE

- » Nearly **2 in 5** visitors plan a Fall South Walton vacation at least **4 months in advance**
- » **14%** of South Walton vacations are impulse decisions (plan two weeks or less in advance)
- » **13%** considered vacationing at a beach outside of South Walton - most of those beaches are in Florida



TRIP PLANNING SOURCES*

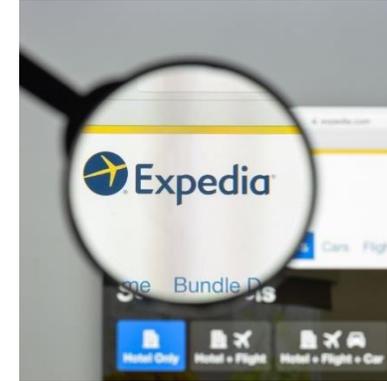


Friends, family **46%**

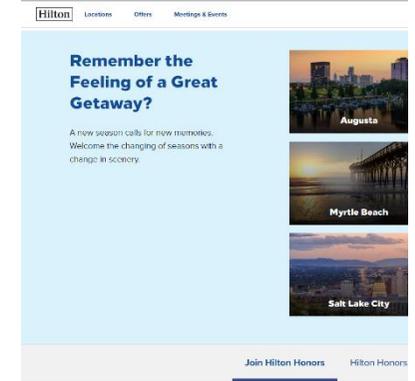
Search sites **34%**



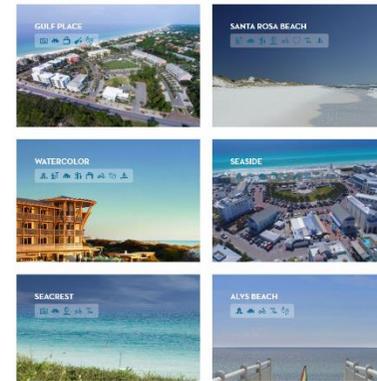
Travel websites **29%**



Hotel Website **25%**



Website for 1 of the 16 beach neighborhoods **24%**



VisitSouthWalton.com **21%**



*Multiple responses permitted.

SOUTH WALTON VISITOR GUIDE

- » **26%** of visitors viewed (mostly online) the South Walton Visitors Guide before going to South Walton



¹10 = Extremely useful; 1 = Not at all useful

TOP REASONS FOR VISIT*

Relax and unwind **64%**



Family vacation **57%**



Annual routine **22%**



Special occasion **15%**



SOUTH WALTON PROMOTIONS

» **27%** of visitors have recently noticed promotions about South Walton

Top Promotion Sources

Television



Other social media



Magazine article



South Walton's social media



TOP BOOKING SOURCES

Vacation Rental Company (**38%**)

ROSEMARY
BEACH
COTTAGE RENTAL COMPANY

HOMEOWNER'S
COLLECTION
Seaside, Florida

NEWMAN-DAILEY
RESORT PROPERTIES, INC.

Hotel/condo (**36%**)

Residence
Inn[®]
Marriott

Sandestin[®]
Golf and Beach Resort

THE
PEARL
hotel • dining • spa

VRBO, Homeaway (**16%**)

HomeAway[®]

VRBO[®]
from HomeAway[®]

VacationRentals.com[™]
Part of the HomeAway Family

VISITOR TRANSPORTATION

- » **87%** of visitors drove to South Walton
- » **13%** who flew used the following airports:

52%

Northwest Florida Beaches
International Airport



31%

Destin-Ft. Walton Beach
Airport



8%

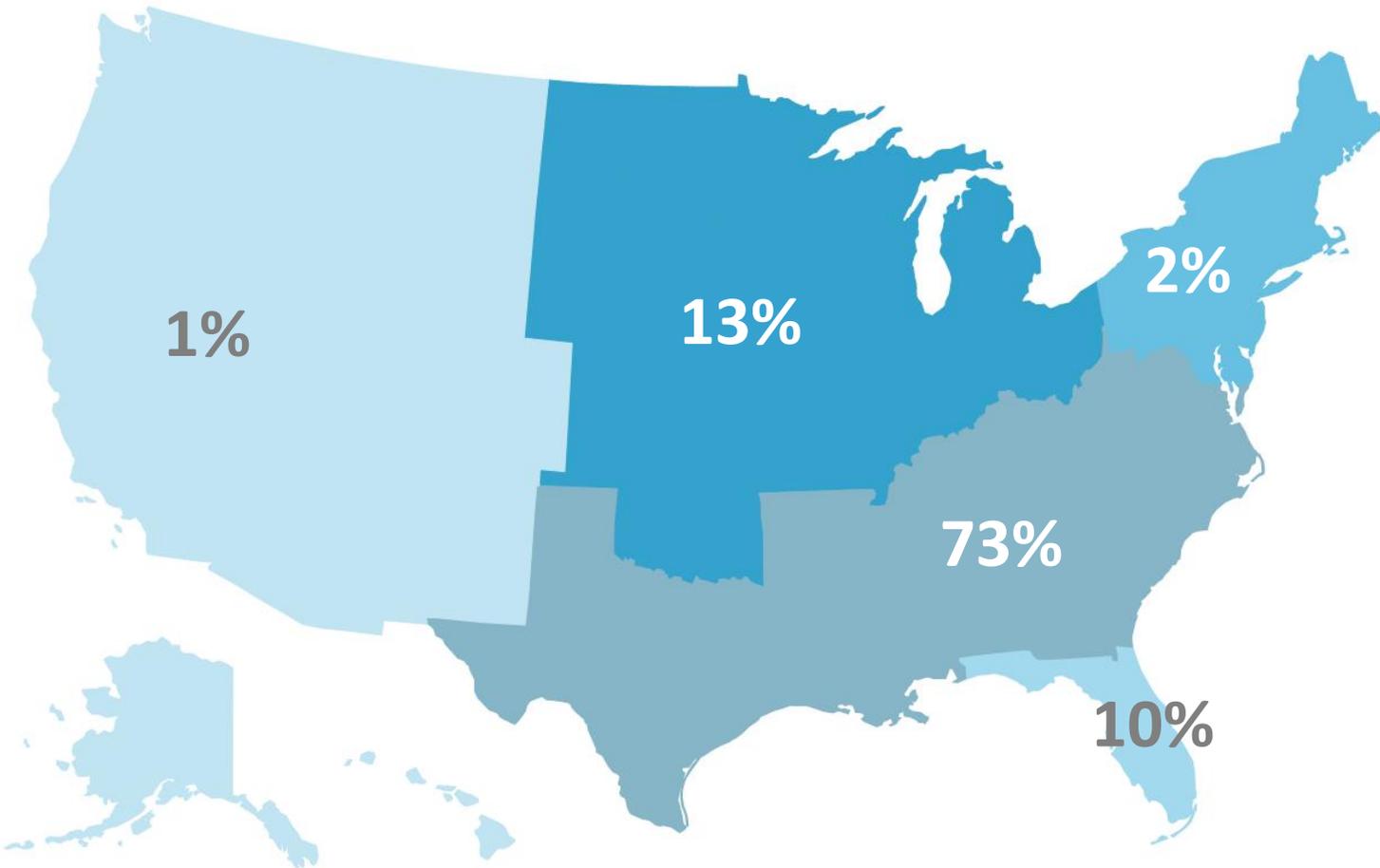
Pensacola International
Airport



VISITOR JOURNEY: TRAVEL PARTY PROFILE

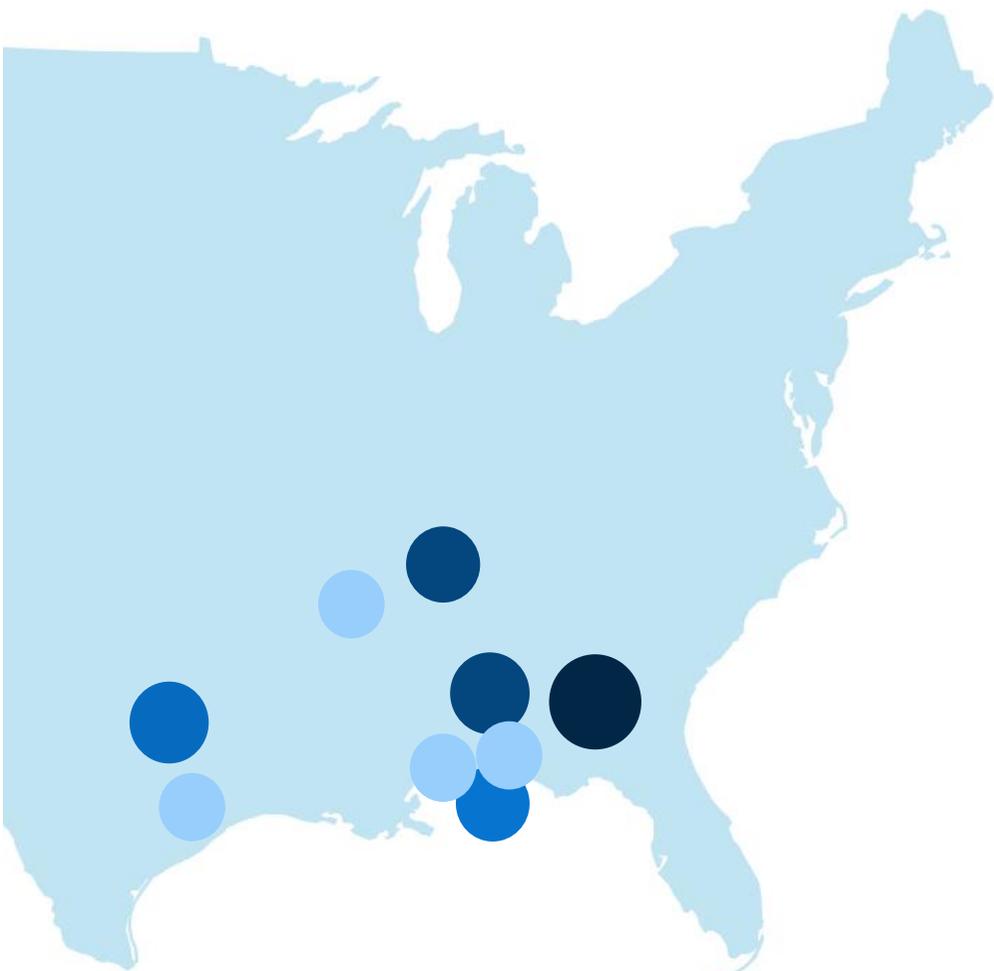


ORIGIN OF FALL VISITORS



1% of visitors were from areas outside the U.S.

ORIGIN OF FALL VISITORS



- 19% ● Atlanta
- 7% ● Nashville
- 7% ● Birmingham
- 5% ● Dallas – Ft. Worth
- 4% ● Pensacola-Mobile
- 4% ● New Orleans
- 3% ● Houston
- 3% ● Memphis
- 3% ● Montgomery

TRAVEL PARTY SIZE AND COMPOSITION

The typical visitor traveled in a party composed of **4.3** people



40% traveled with at least one person under the age of 20 in their travel party



FALL VISITOR PROFILE



- » The typical South Walton Fall visitor:
 - » **55** years old
 - » Female (**60%**)
 - » Median household income of **\$159,100**
 - » From the Southeast (**83%**)

VISITOR PROFILE: TYPICAL VACATIONER¹



→The typical Vacationer¹ Visitor:

→Is **55** years old

→Has a median household income of
\$168,800

→Is female² (**62%**)

→**44%** travel with children

→**88%** drive to the area

→Is from:

→Southeast (**89%**)

VISITOR PROFILE: TYPICAL LONG-TERM¹ VISITOR

→ The typical Long-Term¹ Visitor:

→ Is **57** years old

→ Has a median household income of
\$244,400

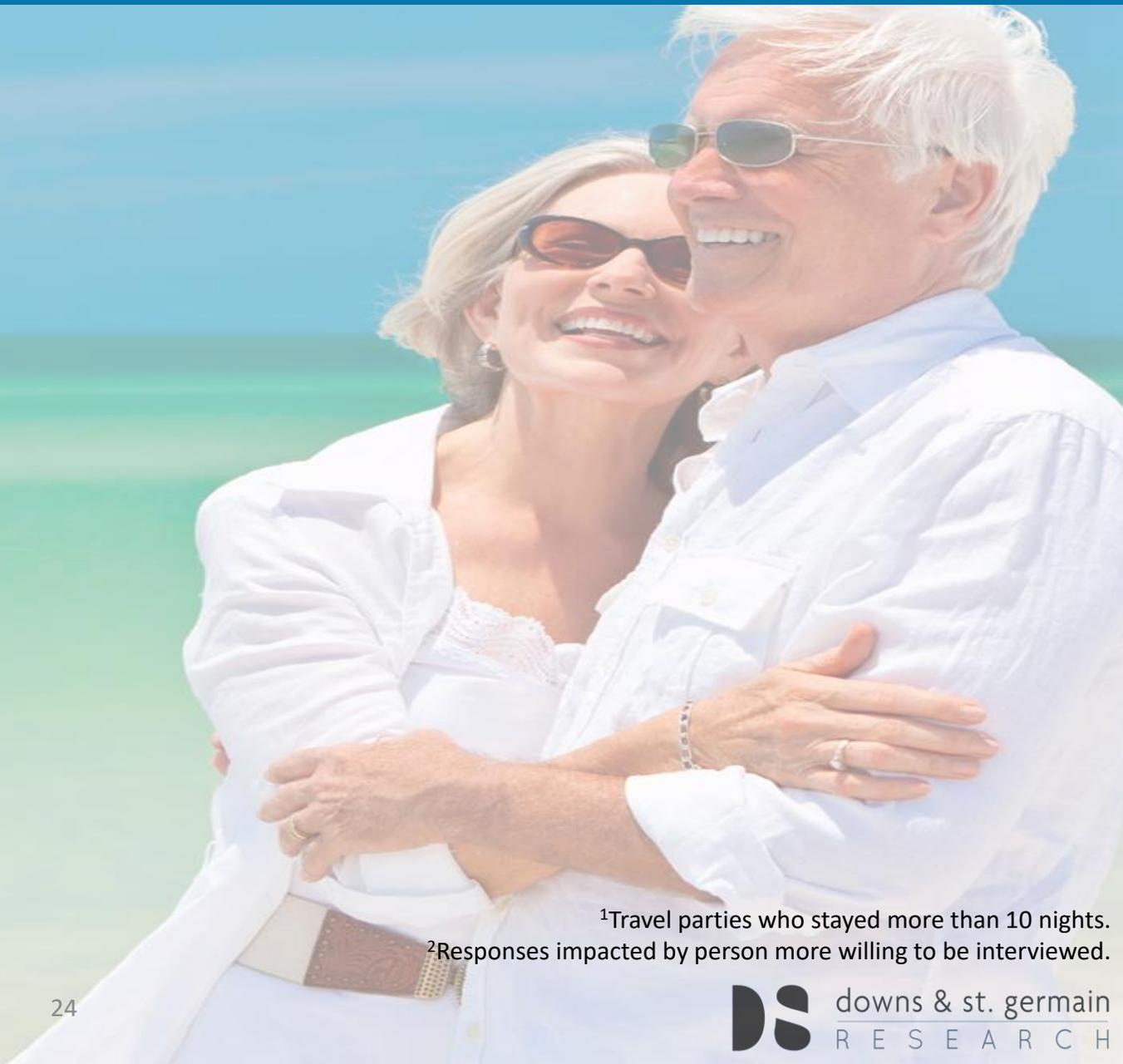
→ Is female² (**75%**)

→ **20%** travel with children

→ **88%** drive to the area

→ Is from:

→ **Southeast (90%)**



¹Travel parties who stayed more than 10 nights.

²Responses impacted by person more willing to be interviewed.

VISITOR PROFILE: TYPICAL DAY TRIPPER

» The typical Day Trip Visitor:

- » Is **57** years old
- » Has a median household income of **\$131,300**
- » Is female¹ (**54%**)
- » **23%** travel with with children
- » **84%** drive to the area
- » Is from:
 - » Southeast – not including FL (**66%**)
 - » Florida (**29%**)



¹Responses impacted by person more willing to be interviewed.

VISITOR JOURNEY: TRIP EXPERIENCE



TOP ACCOMMODATIONS

60% Condos, rental houses, etc.



18% Hotels



9% Personal home/condo



TOP VISITOR ACTIVITIES*

Beach (90%)



Restaurants (88%)



Relax and unwind (77%)



Family time, reading,
cooking (56%)



Shopping, antiques (53%)



*Multiple responses permitted.

LENGTH OF STAY

- » Visitors spent **5.7*** nights in South Walton



*Visitors who stayed 30 or fewer nights.

FIRST-TIME AND EXPERIENCED VISITORS

- » **10%** were first-time visitors
- » **1 in 2** had visited more than 10 times



VISITOR EXPENDITURES*

- » Visitors spent **\$719** a day
- » Visitors spent **\$4,098** on their trip



*Visitors staying in paid accommodations.

VISITOR JOURNEY: POST TRIP EVALUATION



VISITOR SATISFACTION

- » Visitors gave South Walton a rating of **8.9¹** as a place to vacation
- » **95%** will return to South Walton²

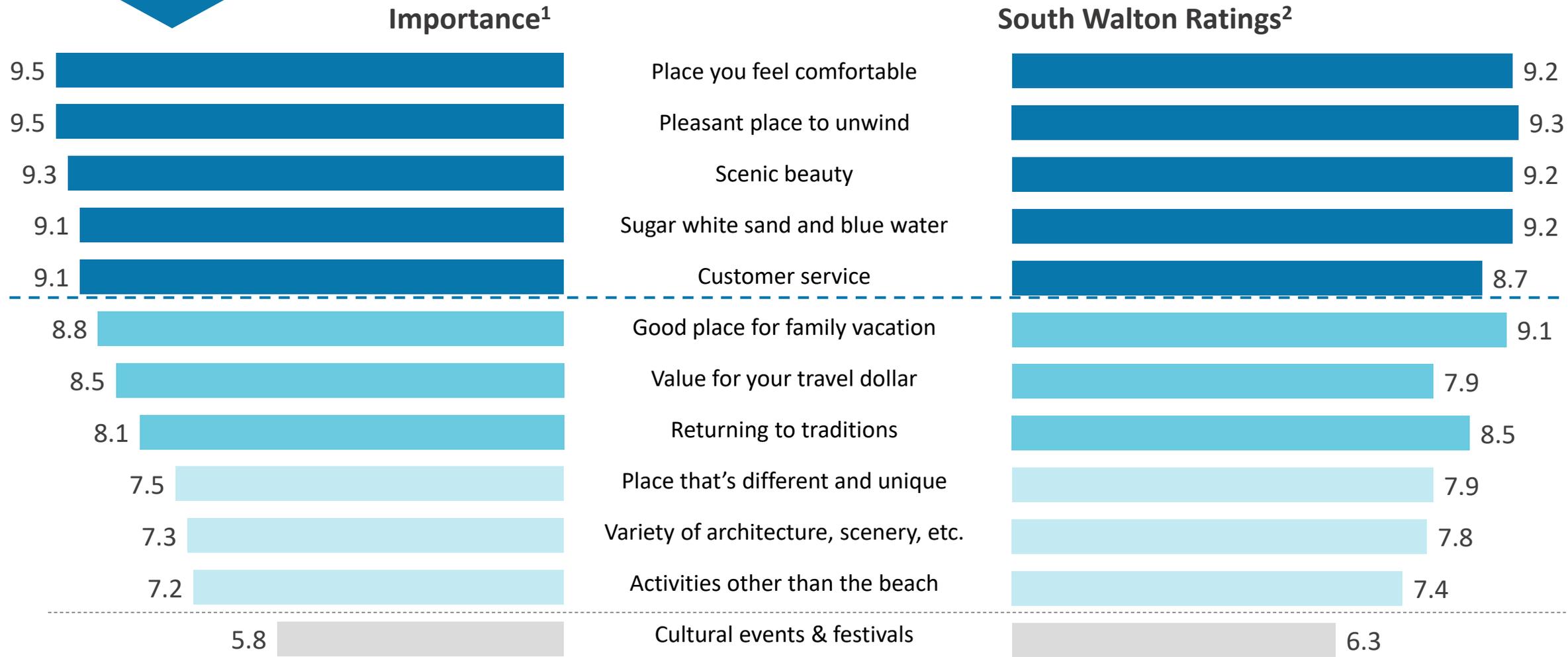


¹10 = Excellent; 1 = Poor

²4% 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



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

Great place to visit (**70%**)



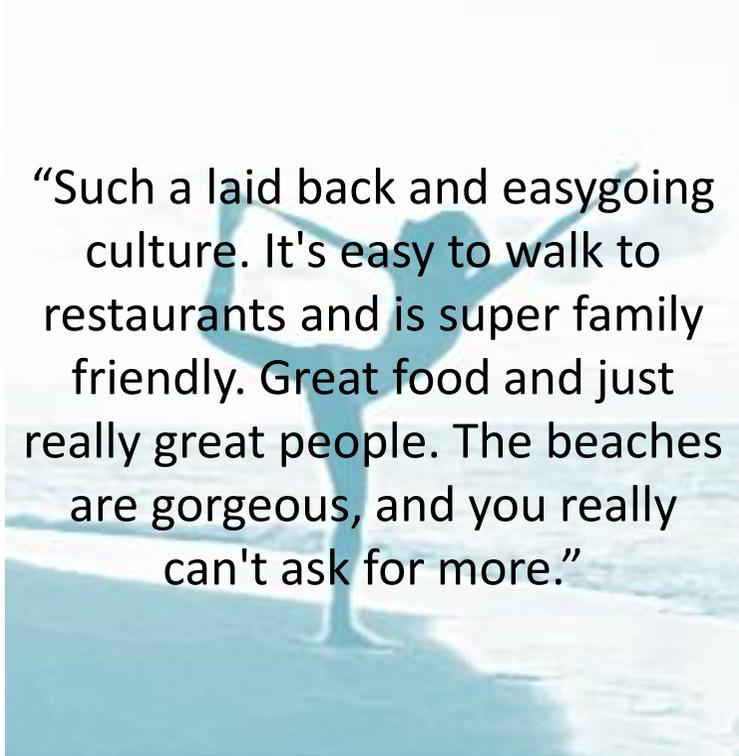
“It is our happy place. A variety of things to do or just the perfect place to go and relax. A great time to make memories with family. When you leave you can't wait for next year and within a month back on the website planning for the next year!”

Beautiful white sand, clear water (**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 & stress free (**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*



*Word cloud generated from verbatim responses

YEARLY COMPARISONS



VISITOR PROFILE – FALL 2019 VS. 2020

Visitor Metrics	Fall 2019	Fall 2020
Travel party	4.3	4.3
Kids <20	40%	40%
Median age	54	55
Estimated median household income	\$166,700	\$159,100
Stayed in condo/rental house	71%	60%
Drove	86%	87%
Nights spent	6.0	5.7
Direct expenditures (travel party for entire trip)	\$3,882	\$4,098
1 st time visitor	14%	10%
10+ visits to South Walton	44%	49%

VISITOR PROFILE – FALL 2019 VS. 2020

Top Origin States	Fall 2019	Fall 2020
Georgia	15%	21%
Alabama	13%	17%
Tennessee	14%	11%
Florida	9%	10%
Texas	8%	9%
Origins - Regions	Fall 2019	Fall 2020
Southeast	72%	83%
Northeast	3%	2%
Midwest	22%	13%
West	2%	1%
International	1%	1%

VISITOR PROFILE – FALL 2019 VS. 2020

Top Visitor Activities	Fall 2019	Fall 2020
Beach	94%	90%
Restaurant	93%	88%
Relax & unwind	88%	77%
Family time, read, cook	71%	56%
Shop, antique	68%	53%
Bike, run, etc.	34%	35%
Bars, nightclubs	29%	30%
State parks	19%	19%
Golf & tennis	13%	18%
Water sports	23%	16%
Hiking, nature walks	17%	16%
Dune Lakes	9%	16%
Attractions	24%	15%
Special events	16%	11%
Art galleries, museums, culture	9%	6%

VISITOR PROFILE – FALL 2019 VS. 2020

Visitor Metrics	Fall 2019	Fall 2020
Will return to South Walton	96%	95%
Rating for overall experience ¹	9.2 ¹	8.9 ¹
Viewed Visitors Guide	17%	26% ²
Planned trip	4+ months out	4+ months out
Used VisitSouthWalton.com	19%	21%
Used 1 of 16 beaches' websites	25%	24%

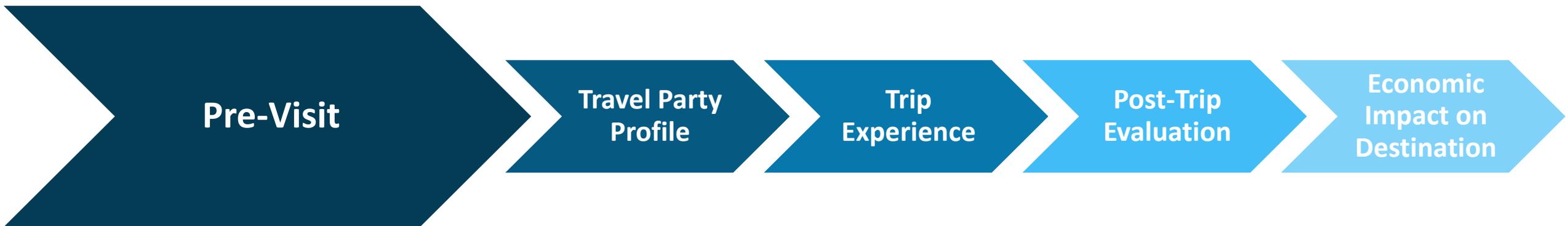
¹ 10-point scale with 10=Excellent & 1=Poor.

² 20% used the online version & 6% used the print version.

DETAILED FINDINGS



VISITOR JOURNEY: PRE-VISIT



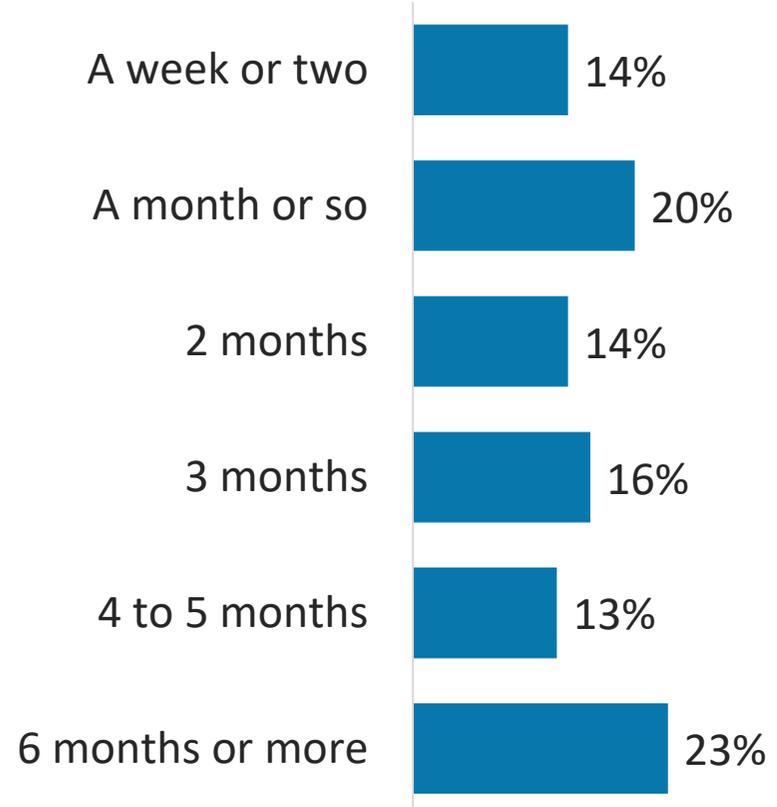
PLANNING CYCLE



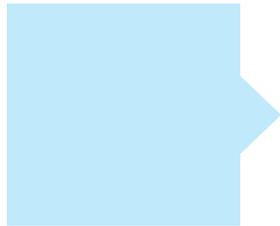
Nearly **2 in 5** visitors plan a Fall South Walton vacation at least **4 months out**.



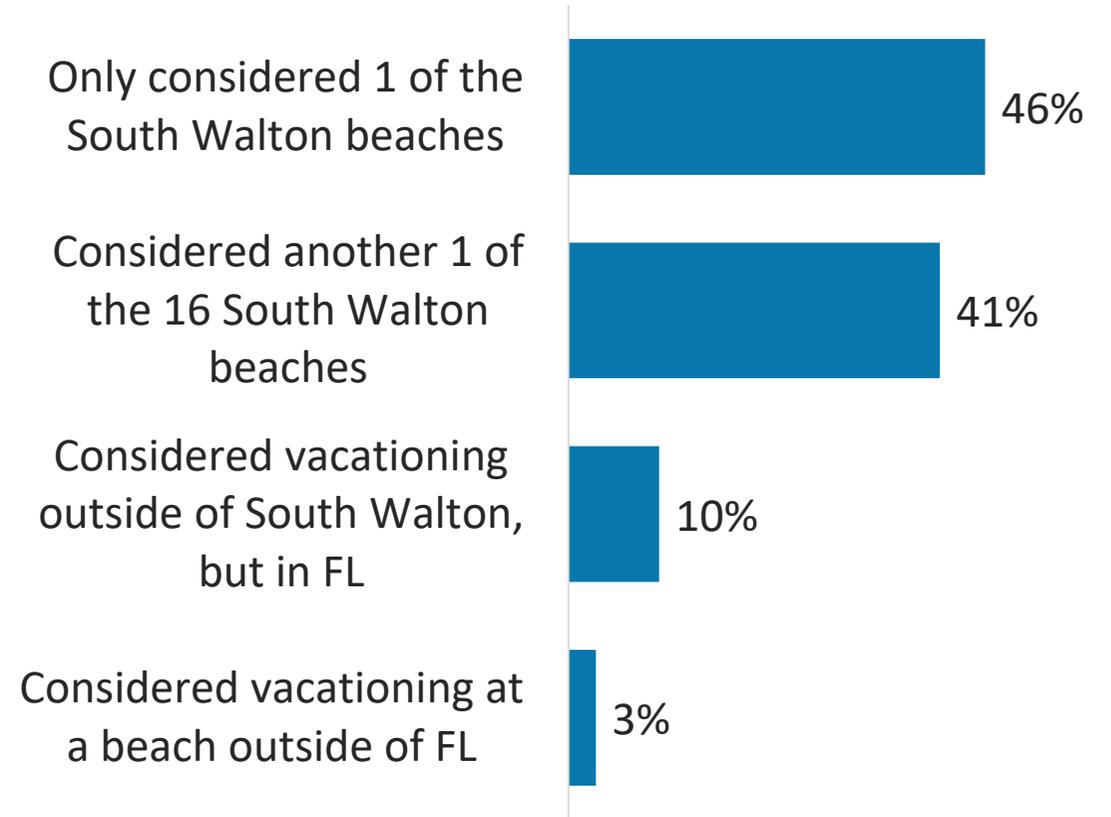
1 in 3 visitors to South Walton have a **short (a month or less) planning cycle**.



OTHER DESTINATIONS CONSIDERED



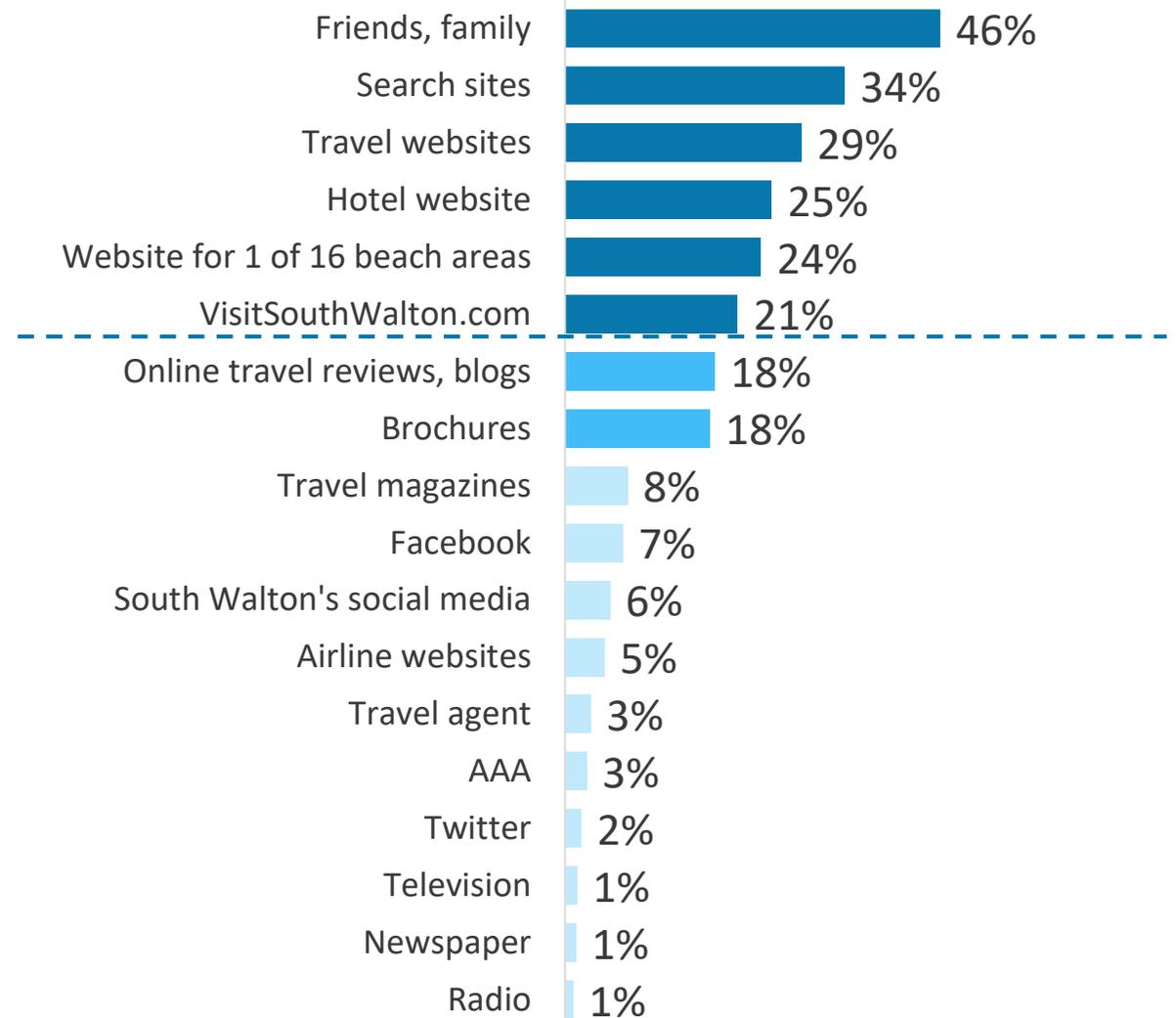
Only **13%** of visitors considered vacationing at a beach outside of South Walton.



PLANNING SOURCES¹

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

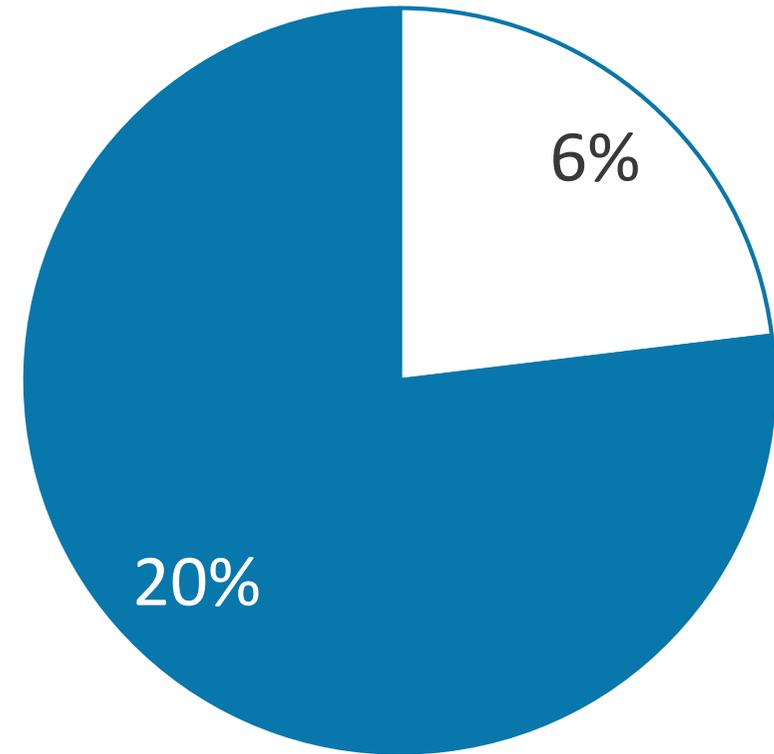
COVID-19 has enhanced use of DMO's websites as visitors want to know what's happening on the ground. Use of VSW's website increased from 19% last year to **21%** this year.



¹Multiple responses permitted.



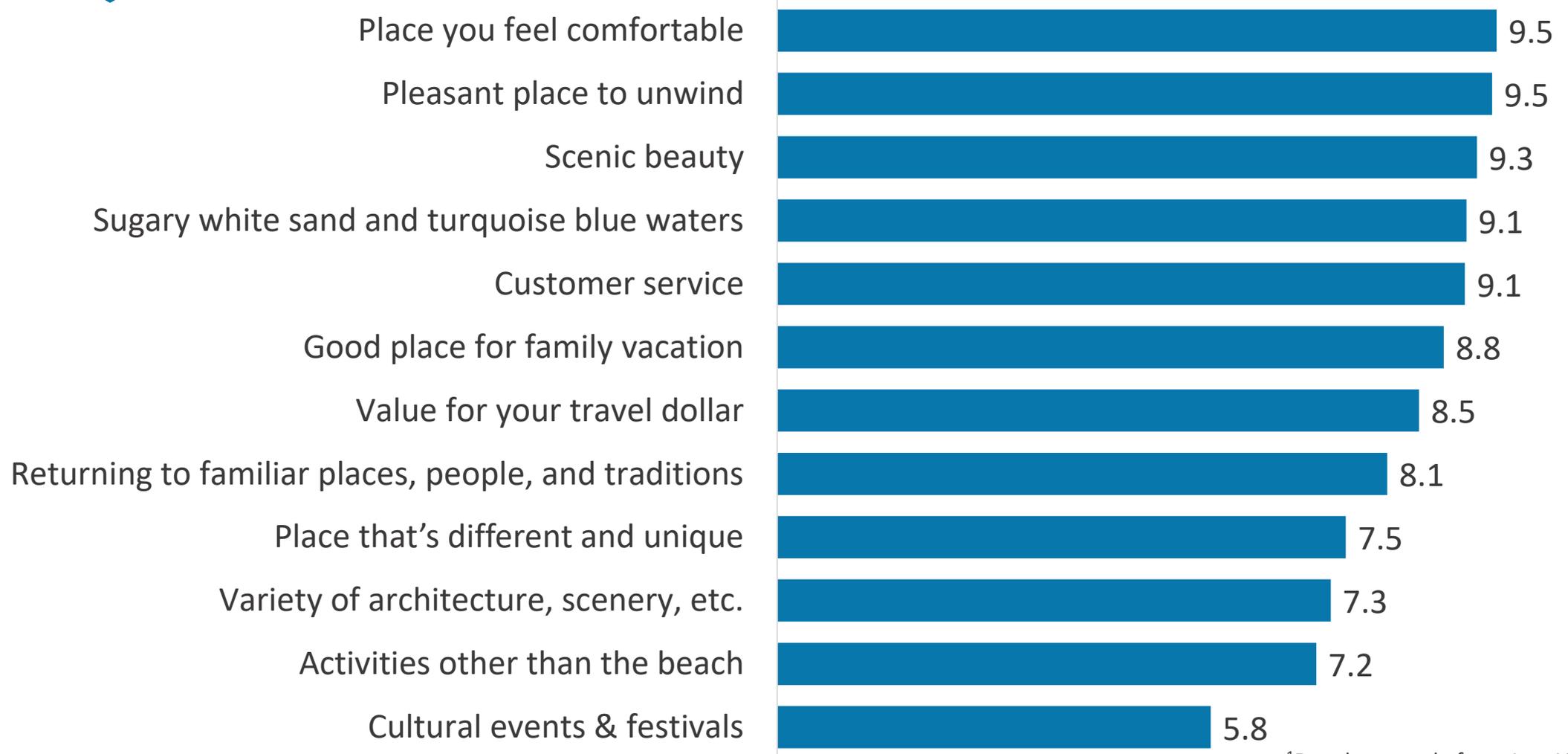
26% of visitors viewed a South Walton Visitors Guide before going to South Walton – the large majority chose to view the guide online.



□ Print version ■ Online version

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

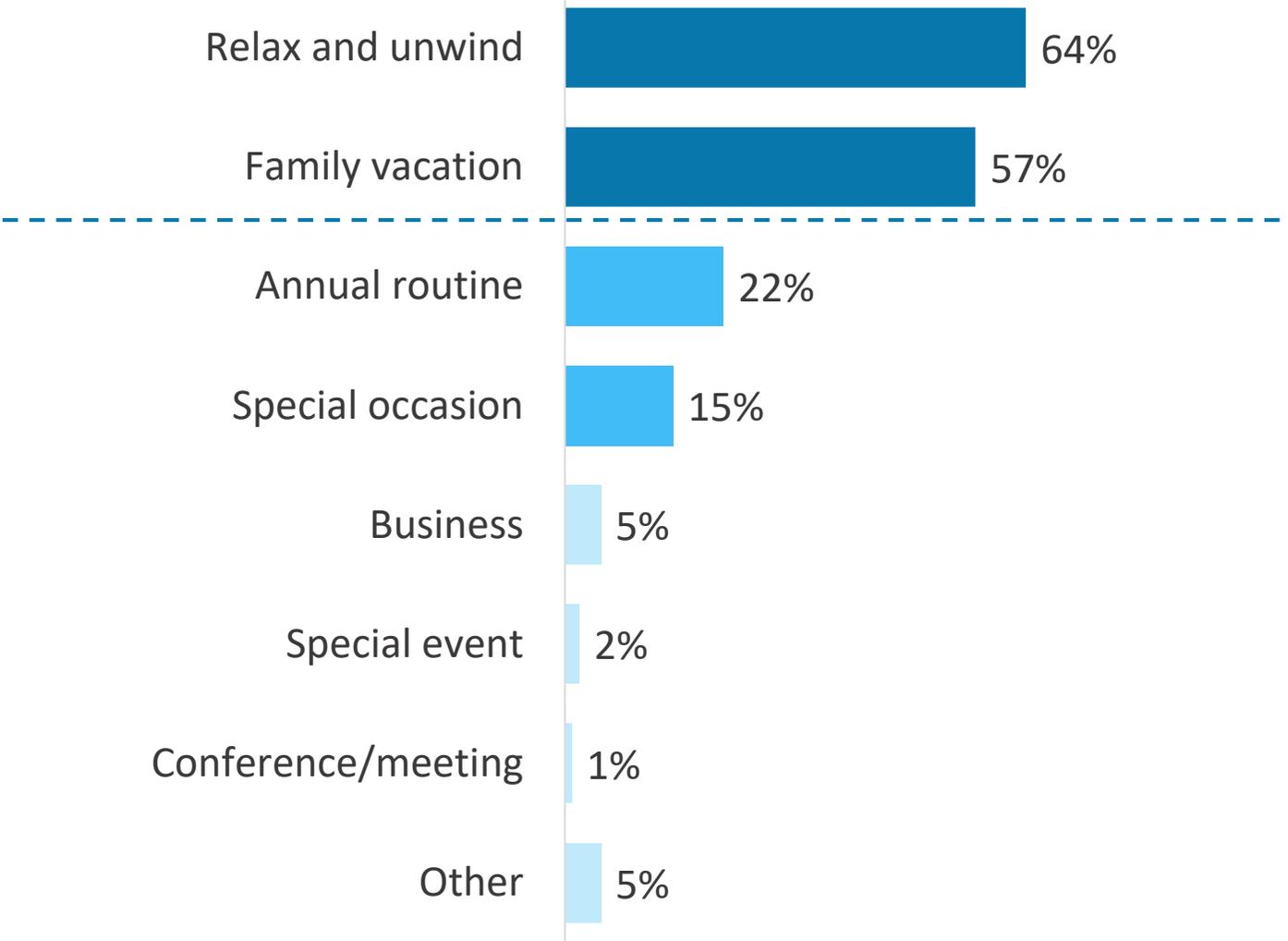
IMPORTANT VACATION DESTINATION ATTRIBUTES¹



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

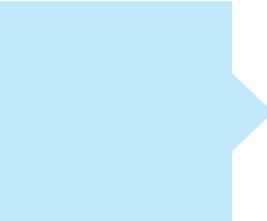
REASONS FOR VISITING¹

Order of reasons for visiting were unchanged from 2019

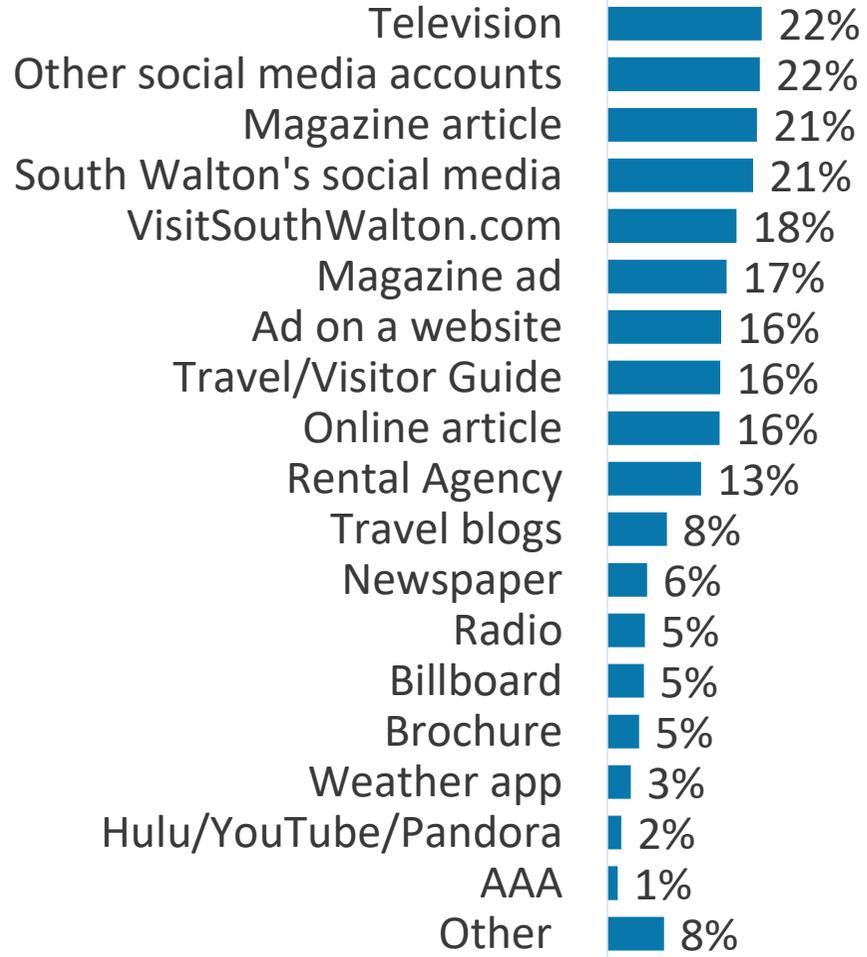


¹Multiple responses permitted.

SOUTH WALTON PROMOTIONS¹

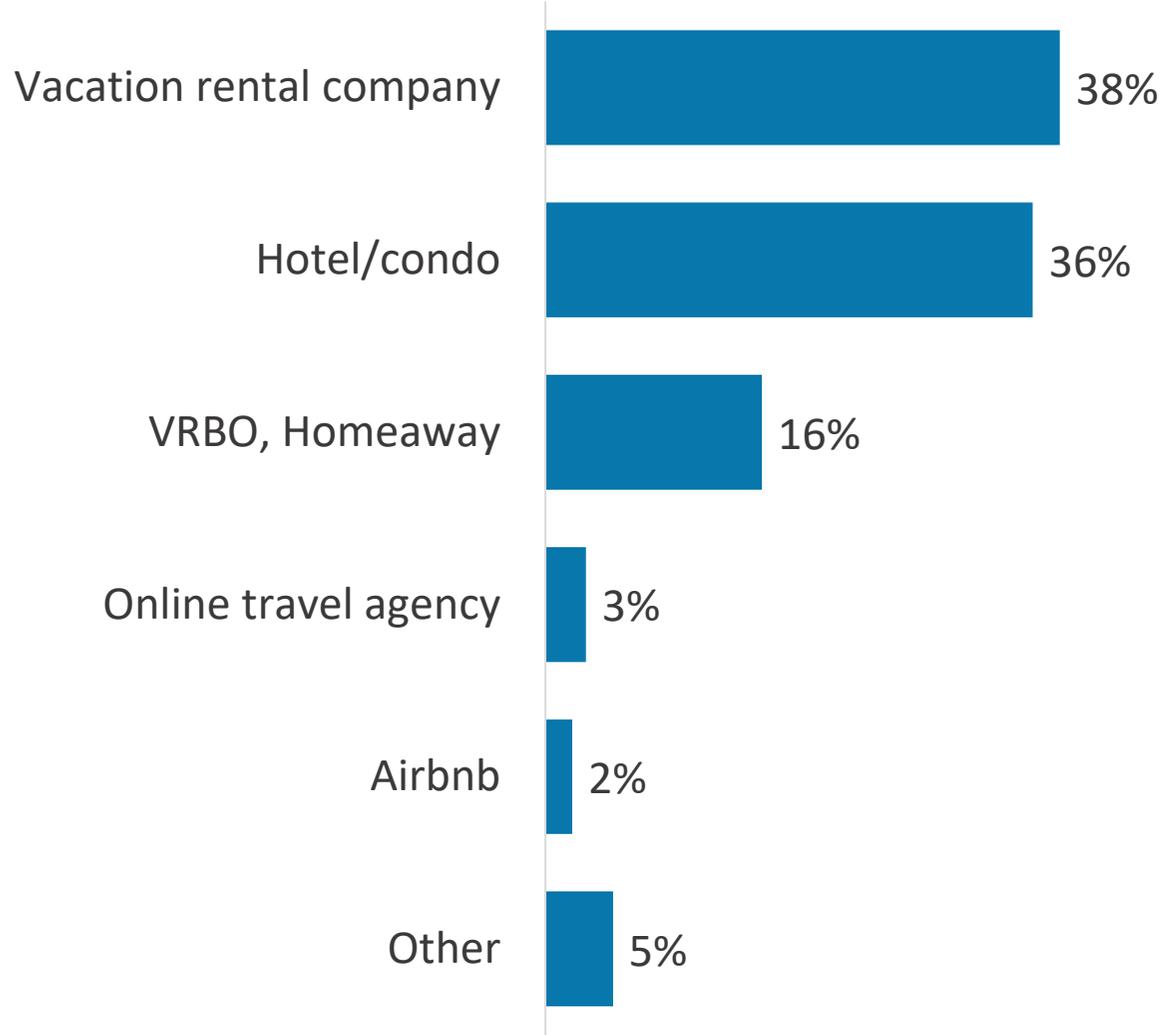


27% of Fall visitors have recently seen, read or heard advertising, promotions or travel stories about South Walton.



¹Multiple responses permitted.

BOOKING ACCOMMODATIONS



VISITOR TRANSPORTATION

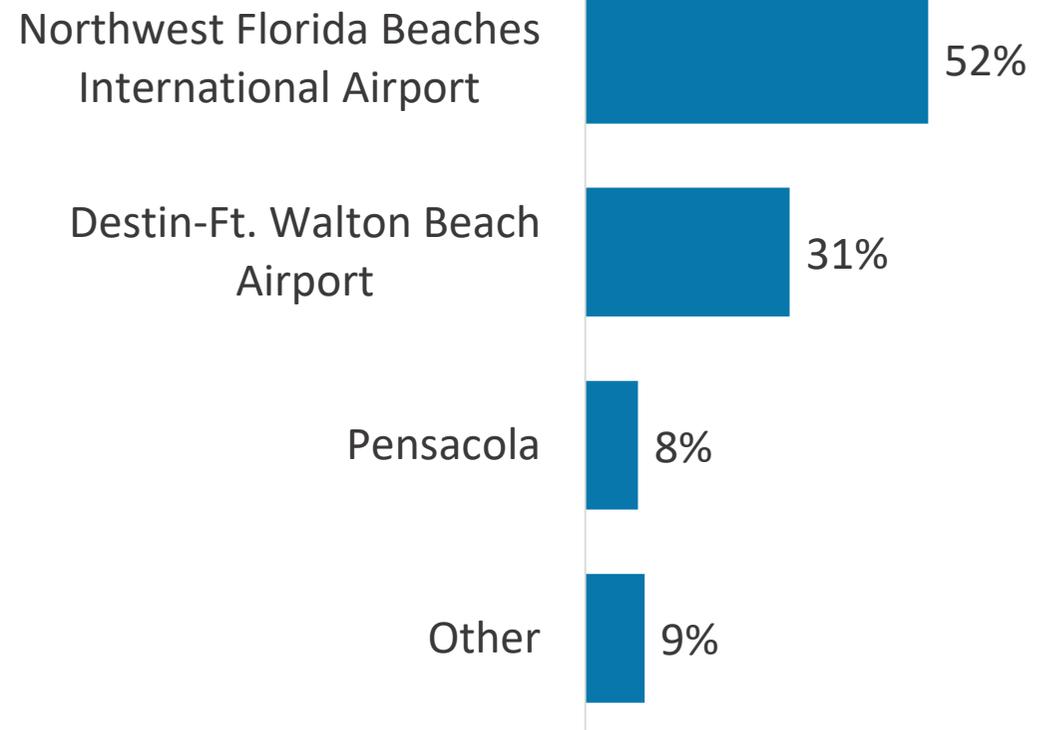


87% of Fall visitors drove to South Walton.



32% of those who drove were aware that there were direct flights from their city to the South Walton area.

13% who **flew** used the following airports:

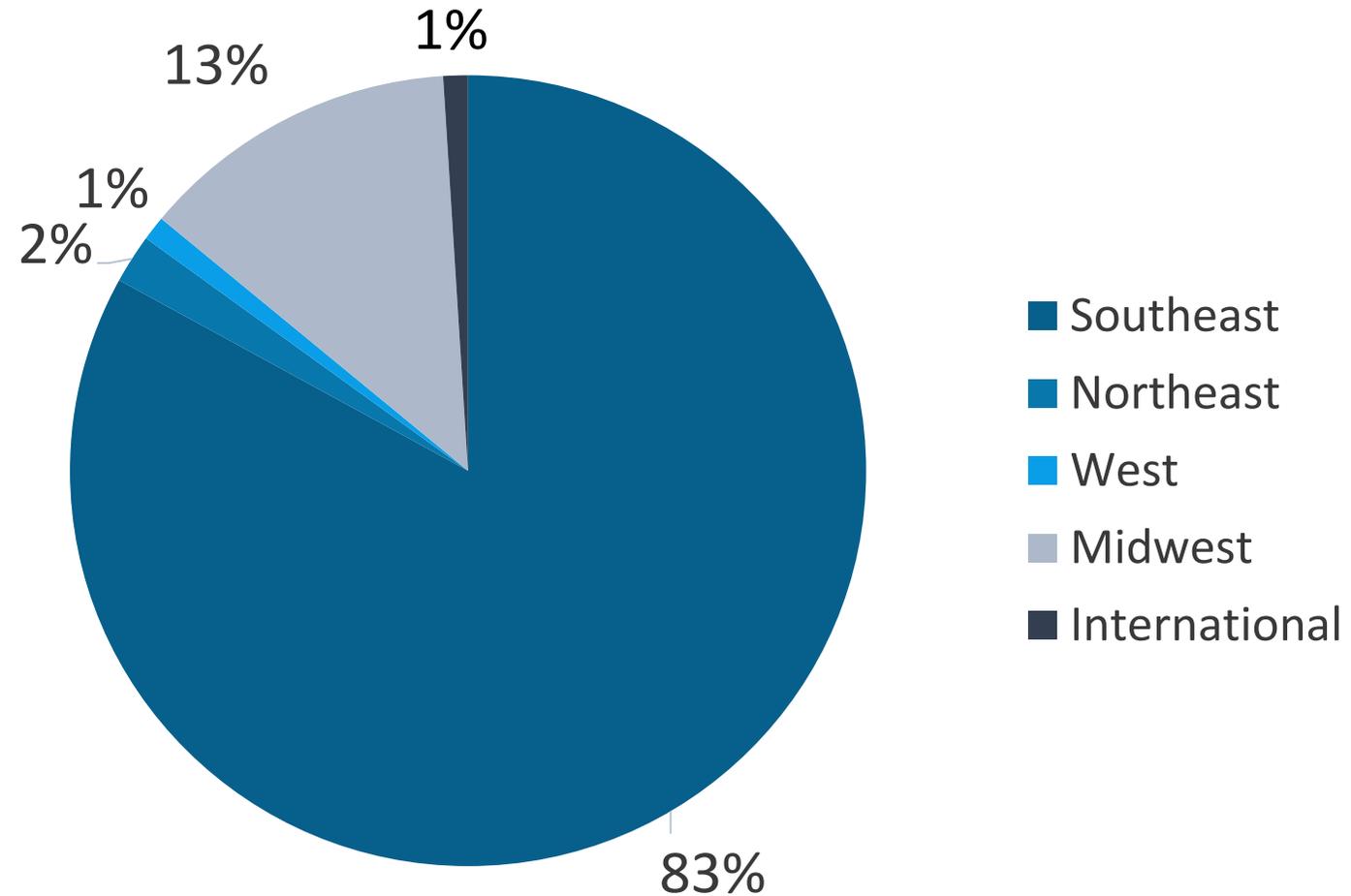


VISITOR JOURNEY: TRAVEL PARTY PROFILE



ORIGIN OF FALL VISITORS

Top Origin Markets	% of Visitors
Atlanta	19%
Nashville	7%
Birmingham	7%
Dallas-Ft. Worth	5%
Pensacola-Mobile	4%
New Orleans	4%
Houston	3%
Memphis	3%
Montgomery	3%
Panama City-Destin	2%
Chattanooga	2%
Huntsville	2%
St. Louis	1%
Louisville	1%
Chicago	1%
Cincinnati	1%
Kansas City	1%
Baton Rouge	1%



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

ORIGIN OF FALL VISITORS

Influenced by COVID-19, 1 in 5 visitors in Fall 2020 hailed from Georgia vs. 15% in Fall 2019.

State	Percentage of Visitors
Georgia	21%
Alabama	17%
Tennessee	11%
Florida	10%
Texas	9%
Louisiana	5%
Mississippi	5%
Kentucky	3%
Missouri	2%
Ohio	2%



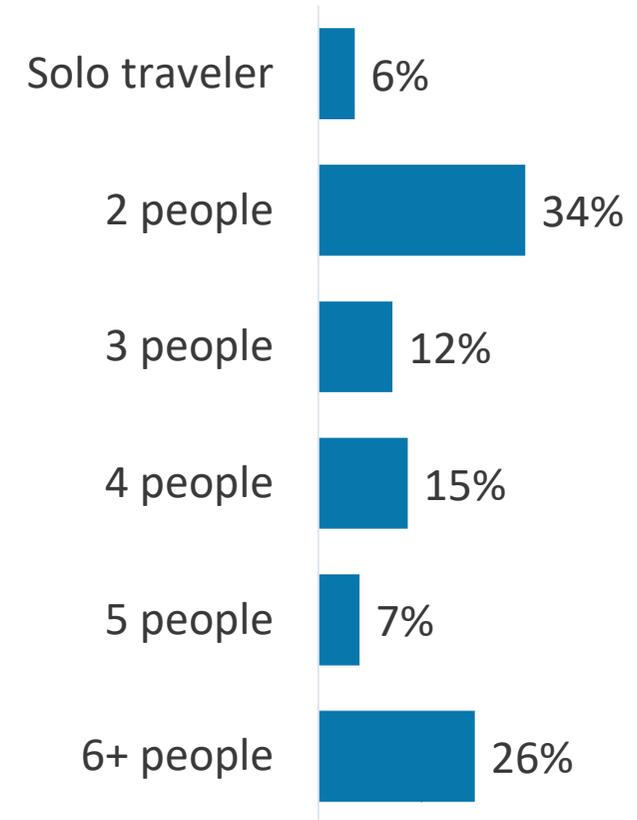
TRAVEL PARTY SIZE AND COMPOSITION



Visitors traveled in a party composed of **4.3** people.

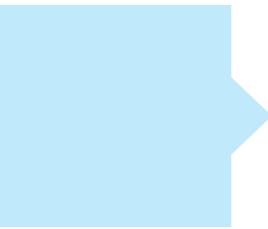


40% of visitors traveled with children under the age of 18.

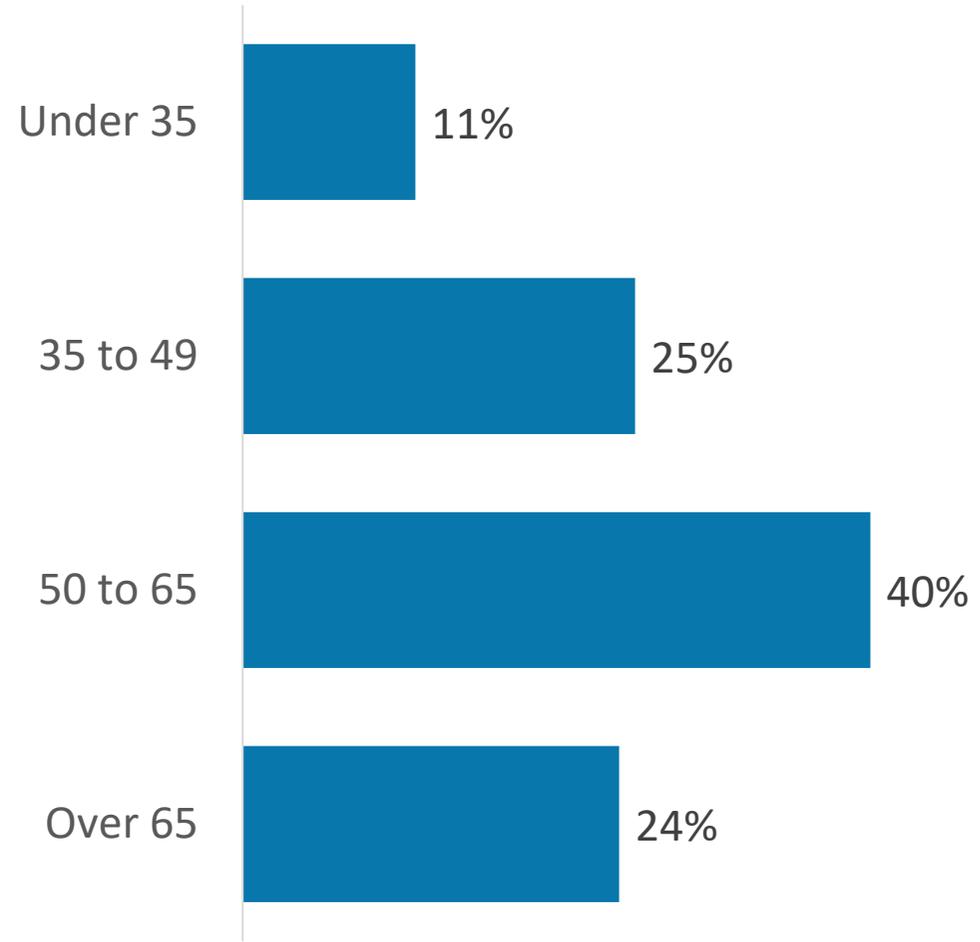


¹Multiple responses permitted.

AGE OF FALL VISITORS



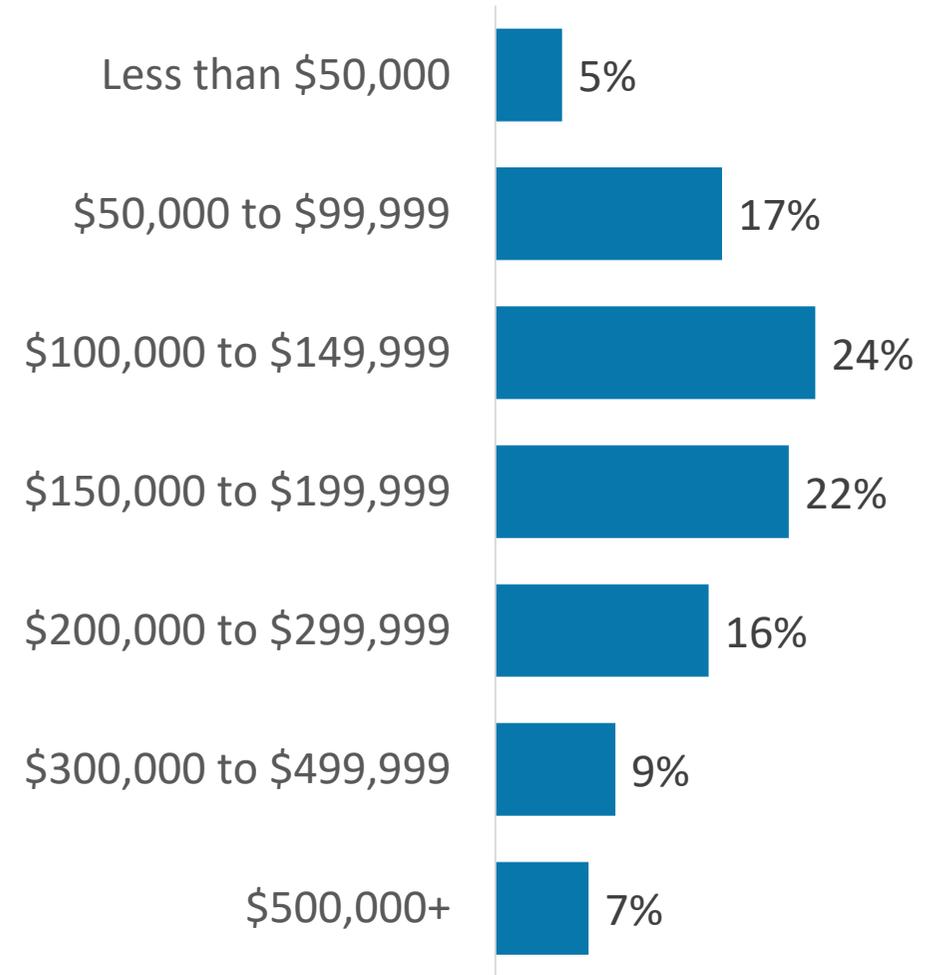
Median age of Fall visitors was **55 years old.**



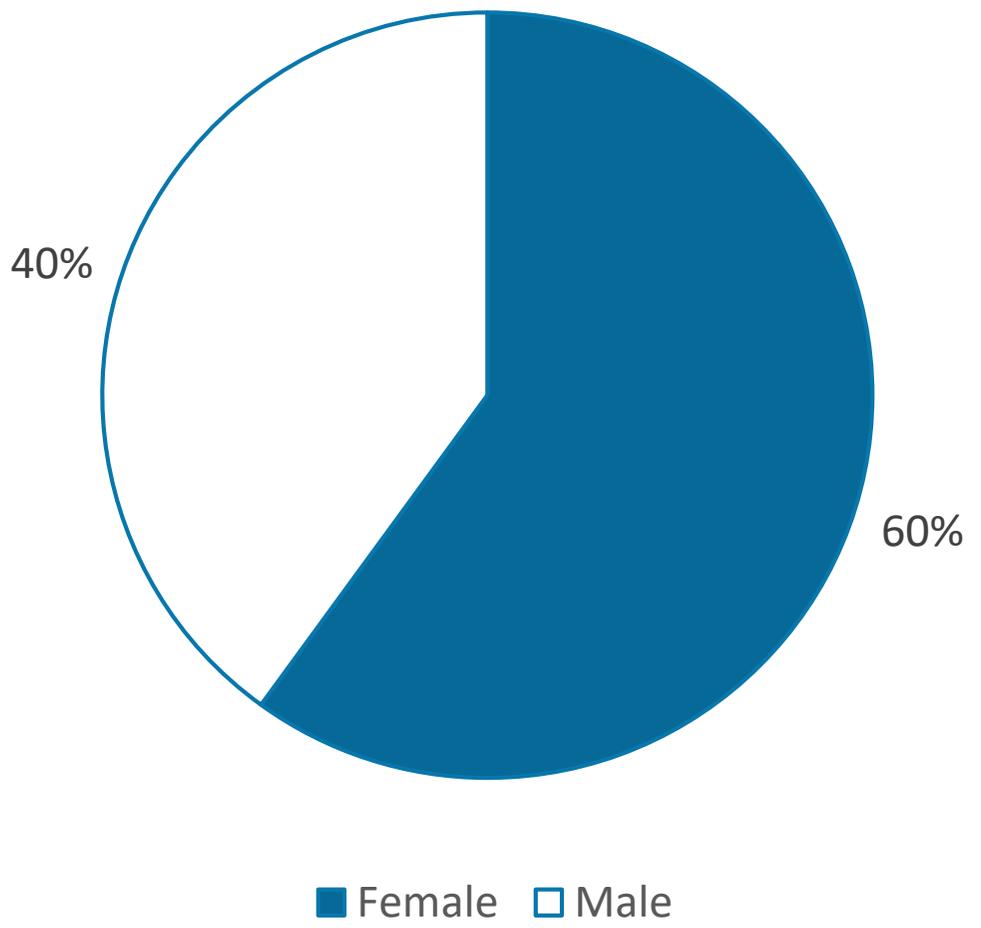
TOTAL HOUSEHOLD INCOME IN 2019



Fall visitors had a **median** household income of **\$159,100**



GENDER

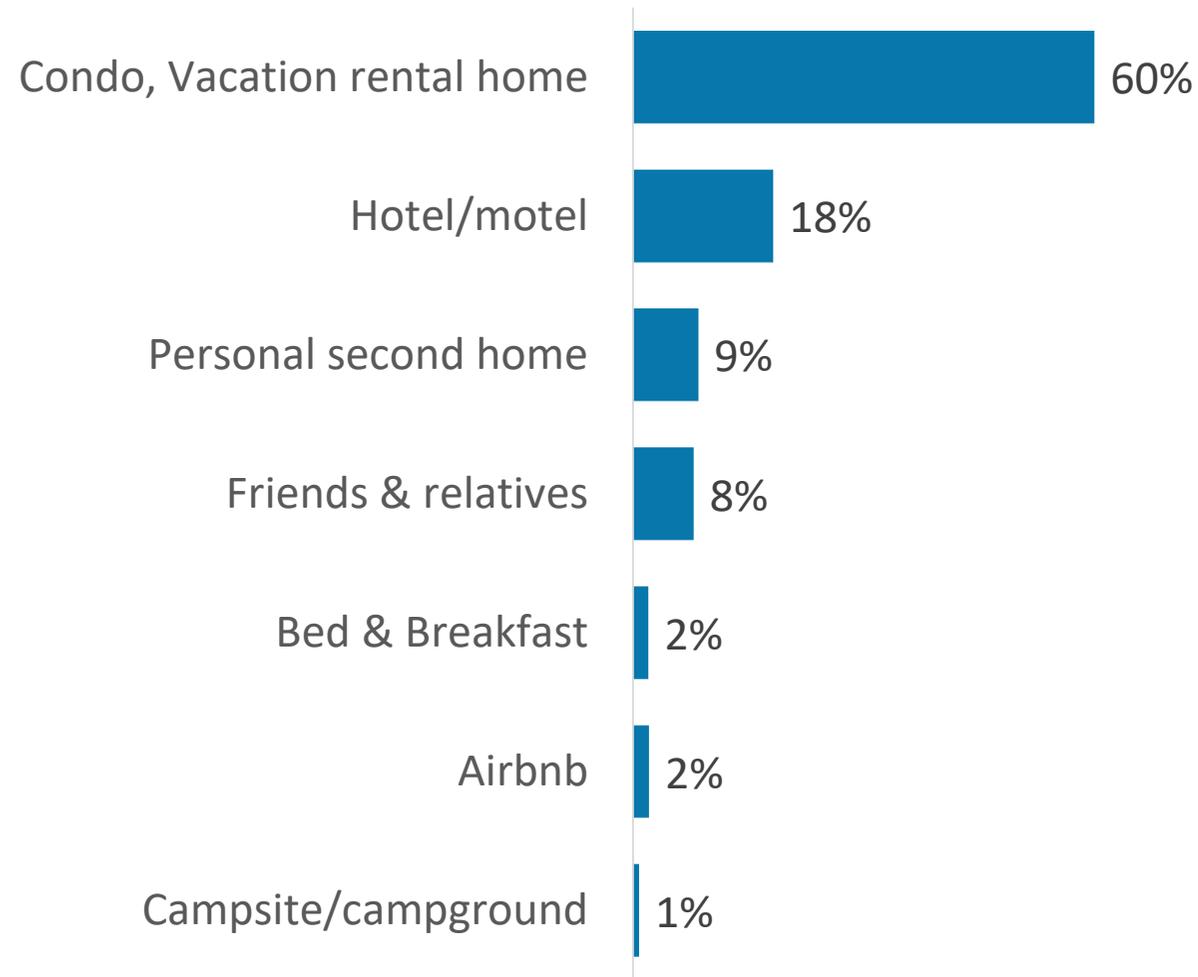


Responses impacted by person more willing to be interviewed

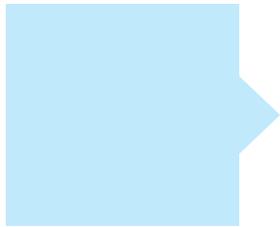
VISITOR JOURNEY: TRIP EXPERIENCE



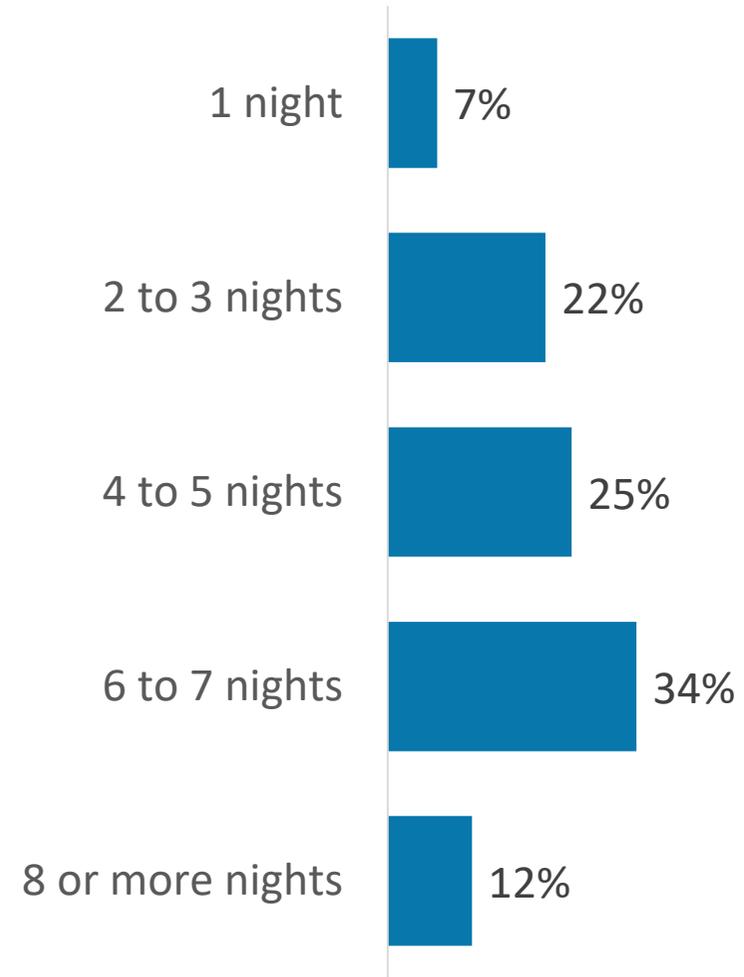
VISITOR PAID ACCOMMODATIONS



LENGTH OF STAY



Fall visitors spent an average of **5.7** nights in South Walton.



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

NUMBER OF VISITS TO SOUTH WALTON

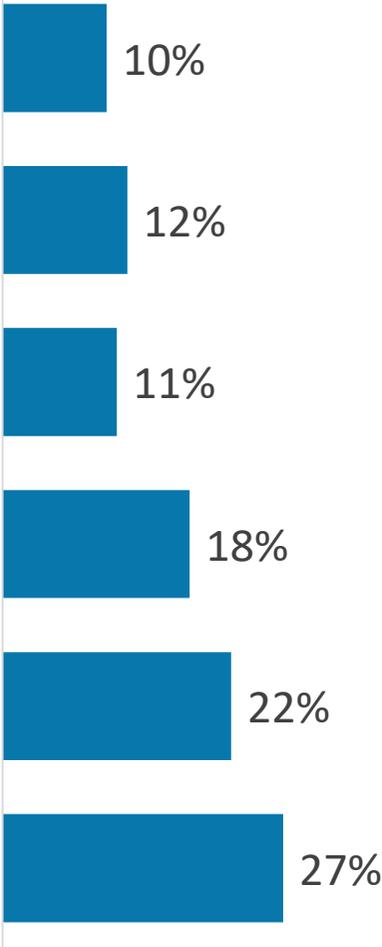


10% of Fall visitors were visiting for the first time.

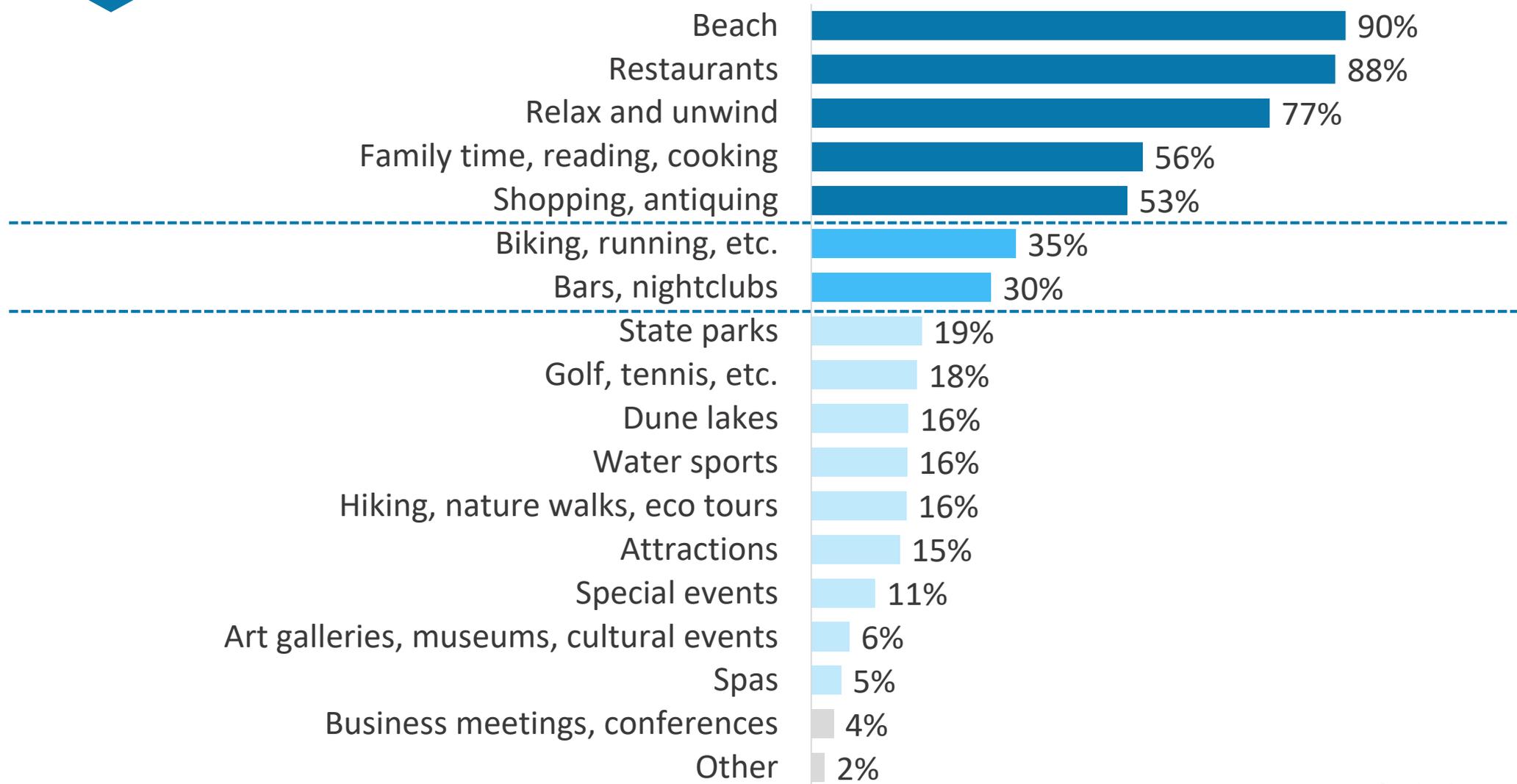


1 in 2 Fall visitors have visited South Walton 10 or more times.

That was my first time



VISITOR ACTIVITIES¹



¹Multiple responses permitted.

TYPICAL SOUTH WALTON TRAVEL PARTY EXPENSES¹

Visitor Metrics ¹	Average Daily Expenditure	Total Trip Expenditure
Accommodations	\$311	\$1,773
Restaurants	\$139	\$792
Groceries	\$52	\$296
Shopping	\$111	\$633
Entertainment	\$39	\$222
Transportation	\$42	\$239
Other	\$25	\$143
Total	\$719	\$4,098

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.

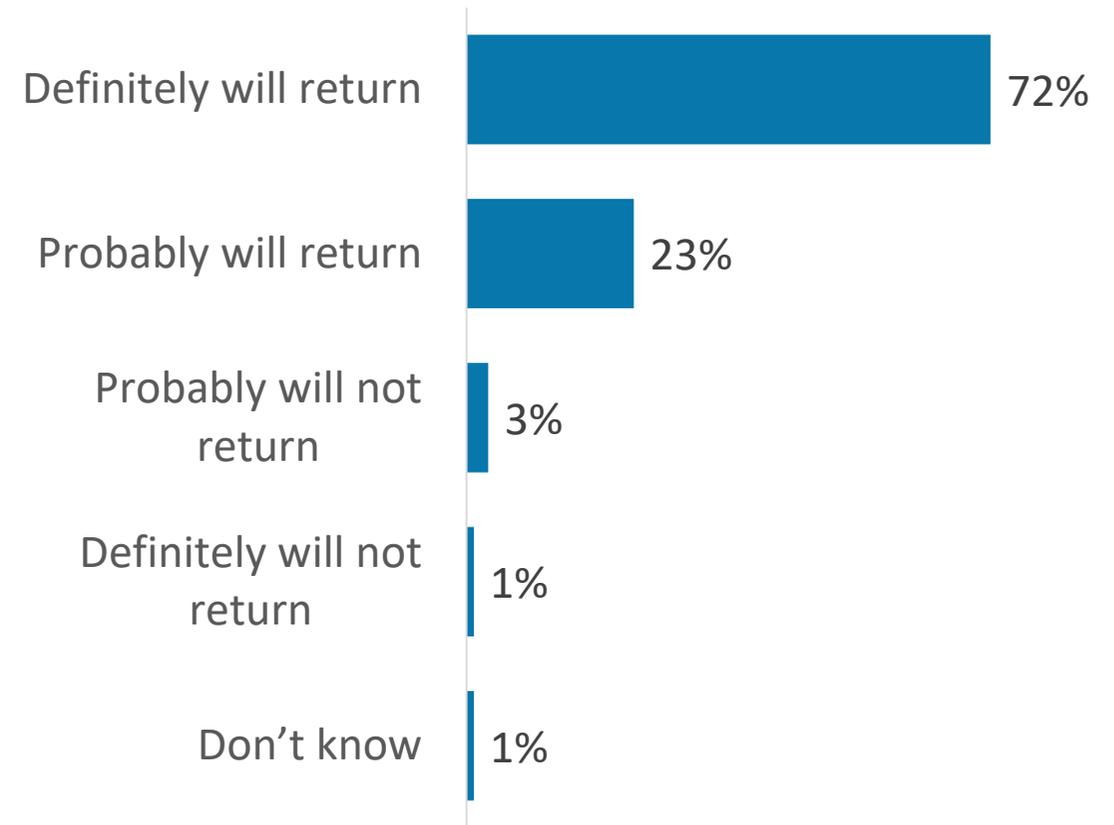
VISITOR JOURNEY: POST-TRIP EVALUATION



SATISFACTION WITH SOUTH WALTON

Visitors gave South Walton a rating of **8.9¹** as a place to vacation, slightly down from 9.2 in 2019

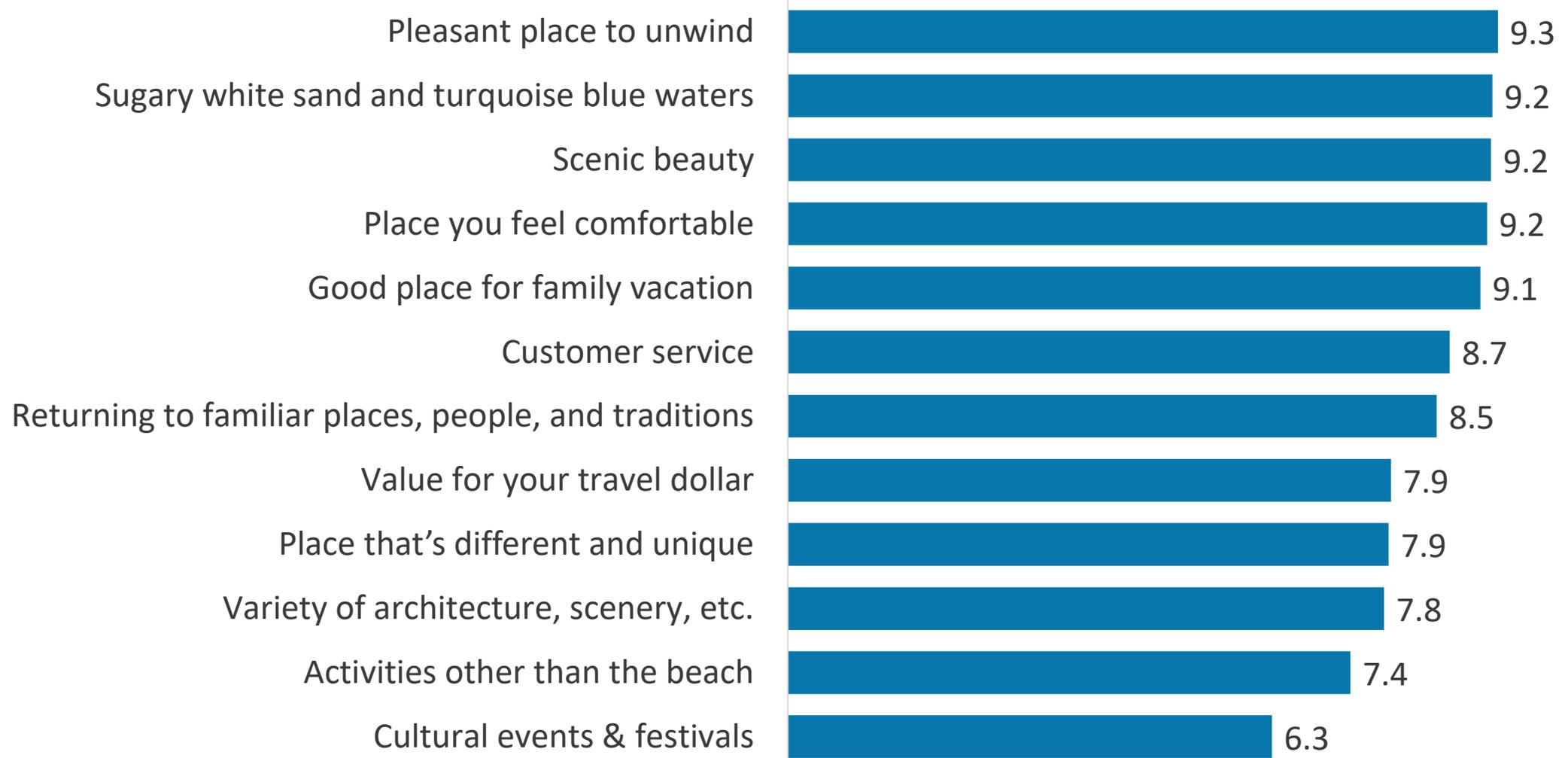
95% will return to South Walton.²



10 = Excellent; 1 = Poor

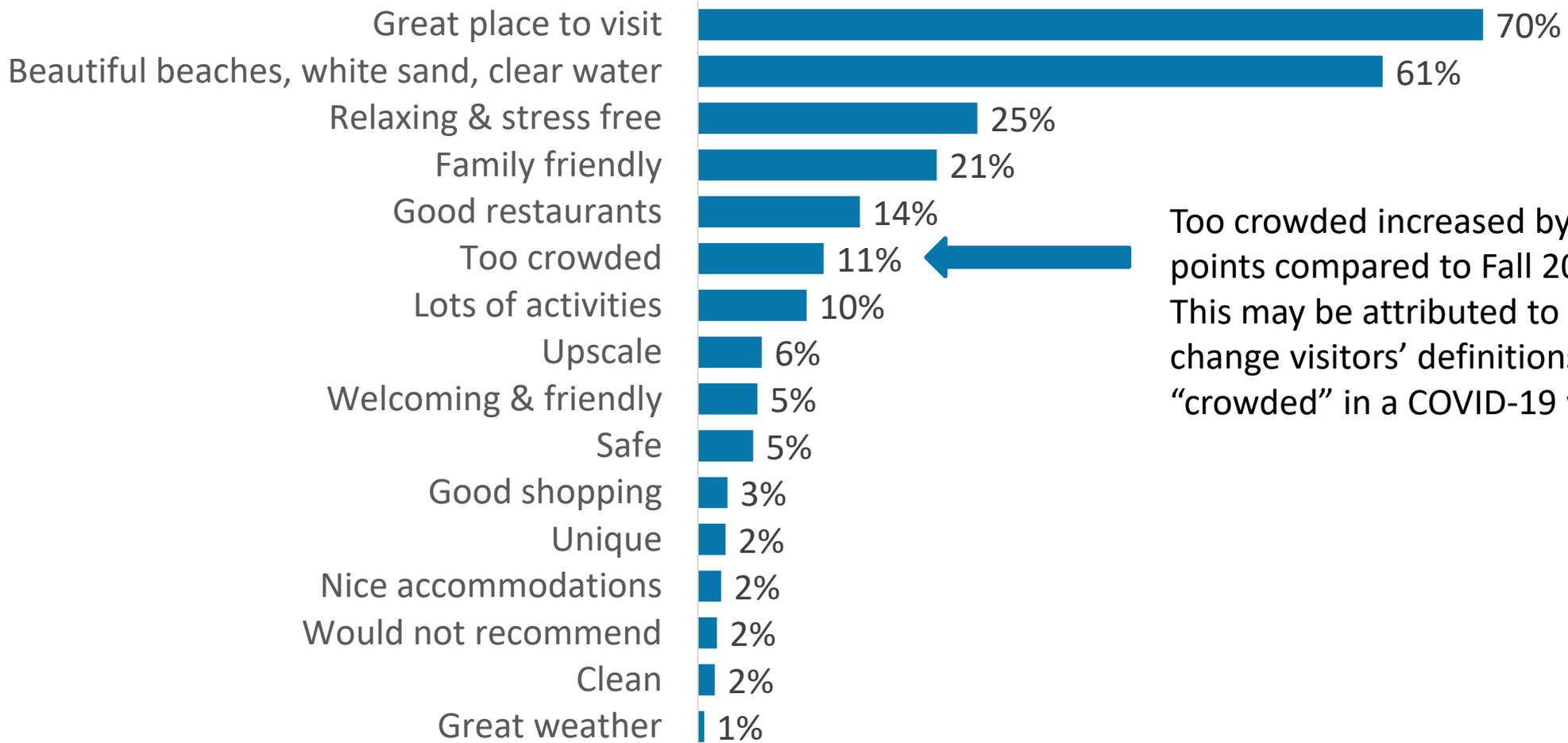
²4% of all visitors will not return to South Walton for the following reasons:
1. Too crowded 2. Too expensive 3. Traffic was a problem

RATING SOUTH WALTON¹



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

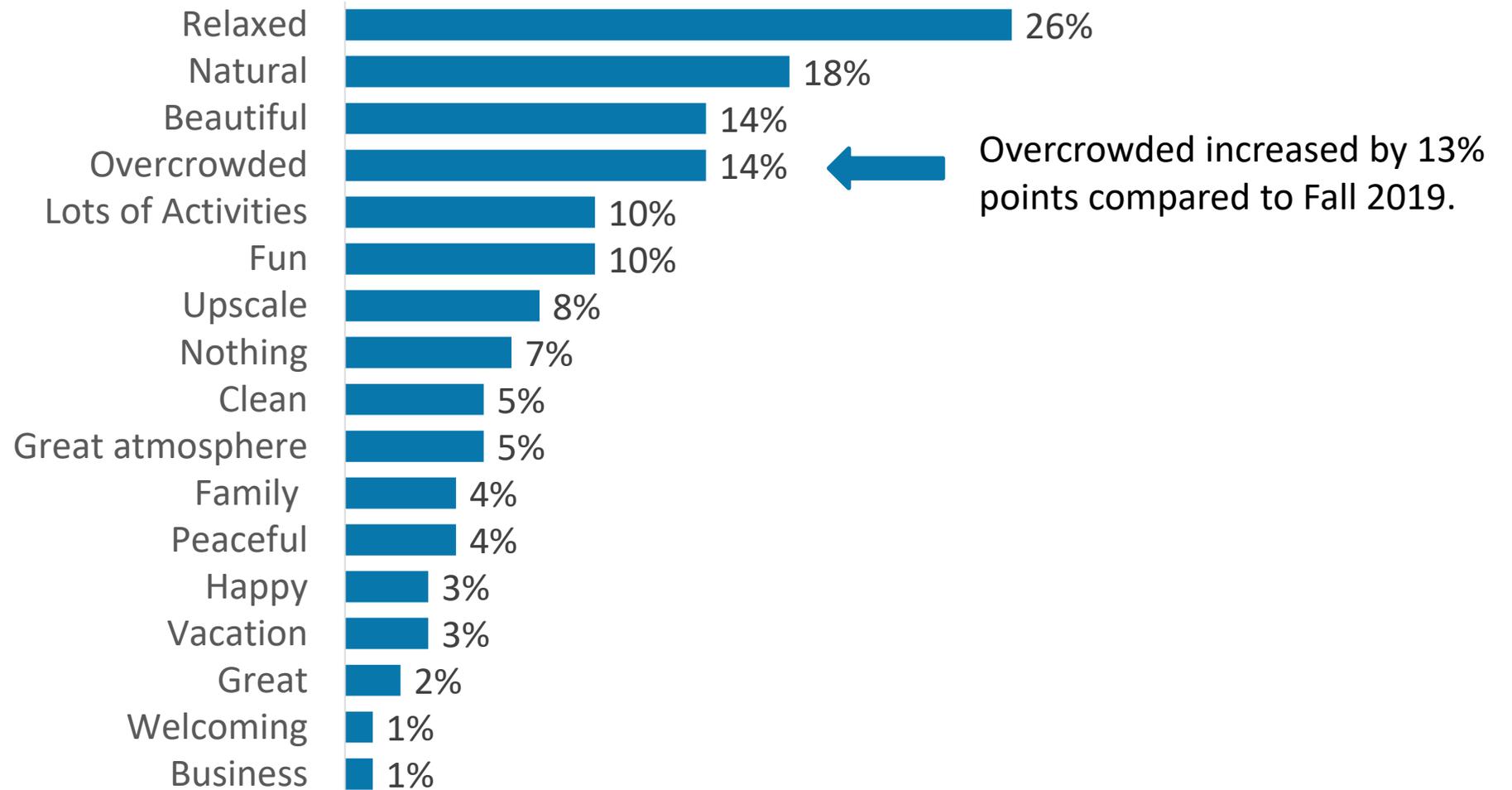
VISITOR DESCRIPTIONS OF SOUTH WALTON¹



Too crowded increased by 7% points compared to Fall 2019. This may be attributed to a change visitors' definitions of "crowded" in a COVID-19 world.

¹Coded verbatim response; multiple responses permitted.

EMOTIONS ASSOCIATED WITH SOUTH WALTON¹



¹Coded verbatim response; multiple responses permitted.

VISIT SOUTH WALTON

Visitor Tracking Study

Fall 2020



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