

VISIT SOUTH WALTON

Fall 2021 Visitor Tracking Study
September 2021 – November 2021

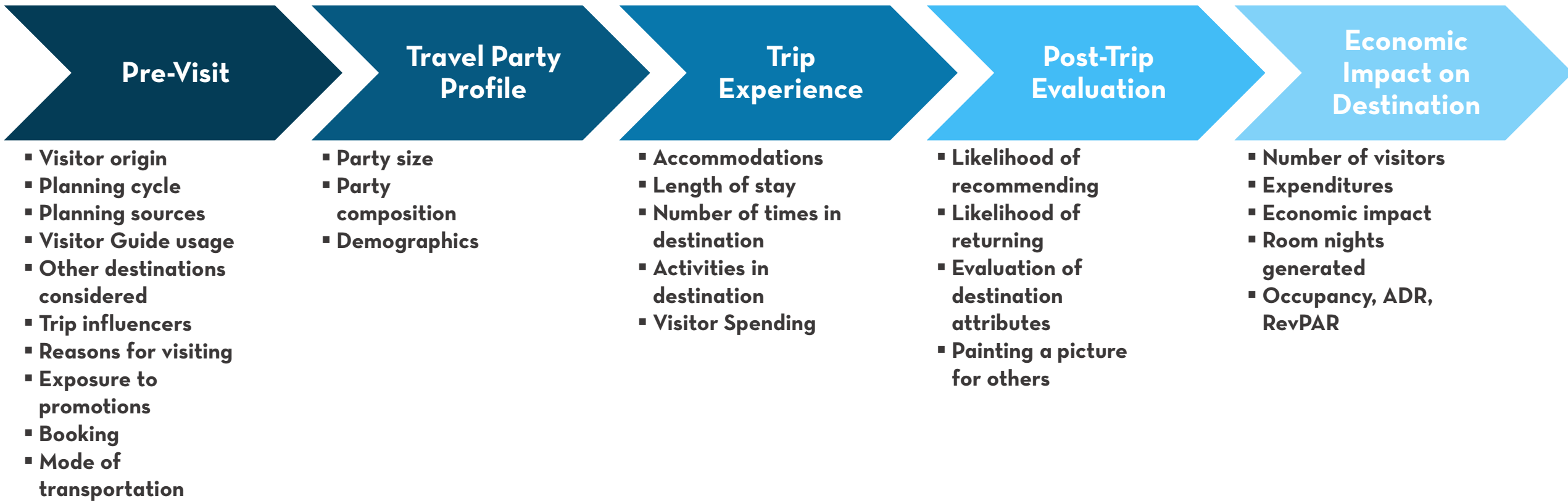


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STUDY OBJECTIVES: MAP THE VISITOR JOURNEY



Visitor Tracking Study

This report is based on 521 internet and in-person surveys* with Fall visitors who traveled to South Walton between September 2021 and November 2021.

South Walton's visitor tracking and economic impact metrics in Fall 2021 were impacted by:

- Changes in visitor behavior
 - Visitors traveled in smaller parties
 - Had longer lengths of stay
 - Were more likely to stay with friends or relatives or in a personal vacation home
- Inventory increase - Available units for visitors in Fall 2021 increased 10.7% from 2020

*Interviews were with out-of-county guests who stayed at properties/vacation rentals at beach communities across South Walton, and with visitors at various locations along the beaches.

EXECUTIVE SUMMARY



SEASONAL SNAPSHOT

FALL 2021

- South Walton's key metrics in Fall 2021 increased compared to Fall 2020
- An increase of active units by 10.7% from 2020 and fewer visitors staying in paid accommodations contributed to an increase in total visitors, yet a slightly lower occupancy than Fall 2020
- Direct spending was up more (+9.2%) than the number of visitors (+2.2%) as South Walton generated higher yield per visitor
- Compared to Fall 2020, ADR jumped 30.8% in Fall 2021
- TDT collections increased 24.5% in 2021 compared to 2020
- With over 821 thousand visitors this Fall, total economic impact was nearly \$1.4 billion, up 9.2% from Fall 2020
- More visitors to South Walton stayed with friends and relatives compared to last year



821,569

TOTAL
VISITORS

↑ 2.2%



741,824

ROOM
NIGHTS

↑ 4.5%



\$940,194,300

DIRECT
SPENDING

↑ 9.2%



VISIT
**SOUTH
WALTON**

vs. 2020



downs & st. germain
RESEARCH

VISITOR JOURNEY:

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



VISITOR JOURNEY: ECONOMIC IMPACT

The bottom line is the economic impact of the visitor's journey, so we start there.



ECONOMIC IMPACT – FALL 2020 VS. 2021

- » An increase of active units by 10.7% from 2020 and fewer visitors staying in paid accommodations contributed to an increase in total visitors, yet a slightly lower occupancy than Fall 2020.
- » Compared to Fall 2020, ADR jumped 30.8% in Fall 2021. TDT collections increased 24.5% in 2021 compared to 2020.
- » With over 821 thousand visitors this Fall, total economic impact was nearly \$1.4 billion, up 9.2% from Fall 2020.

Visitor Metrics	Fall 2020	Fall 2021	% Δ
Room nights	709,753	741,824	+4.5%
Total visitors	803,900	821,569	+2.2%
TDT collections	\$8,830,124	\$10,992,761	+24.5%
Direct spending	\$861,147,800	\$940,194,300	+9.2%
Economic impact	\$1,274,498,700	\$1,391,487,600	+9.2%
Occupancy	49.9%	48.2%	-3.4%
Room rates	\$273.18	\$357.37	+30.8%
RevPAR	\$136.32	\$172.15	+26.3%

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

ECONOMIC IMPACT - LODGING STATISTICS

48.2%

Occupancy

↓ 3.4%

\$357.37

ADR

↑ 30.8%

\$172.15

RevPAR

↑ 26.3%

VISITOR JOURNEY: PRE-VISIT



PLANNING CYCLE

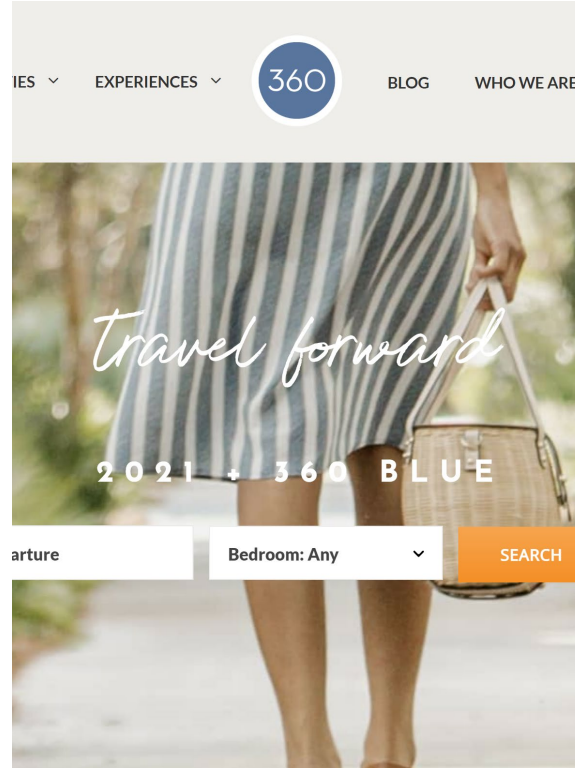
- » **55%** of visitors plan a South Walton Fall vacation at least 3 months in advance
- » Average trip planning cycle began **89 days** before the trip (**87 days in 2020**)
- » Over **half** (+6% points from 2020) of Fall visitors considered only 1 of the South Walton Beaches as opposed to deciding among several



TOP TRIP PLANNING SOURCES*



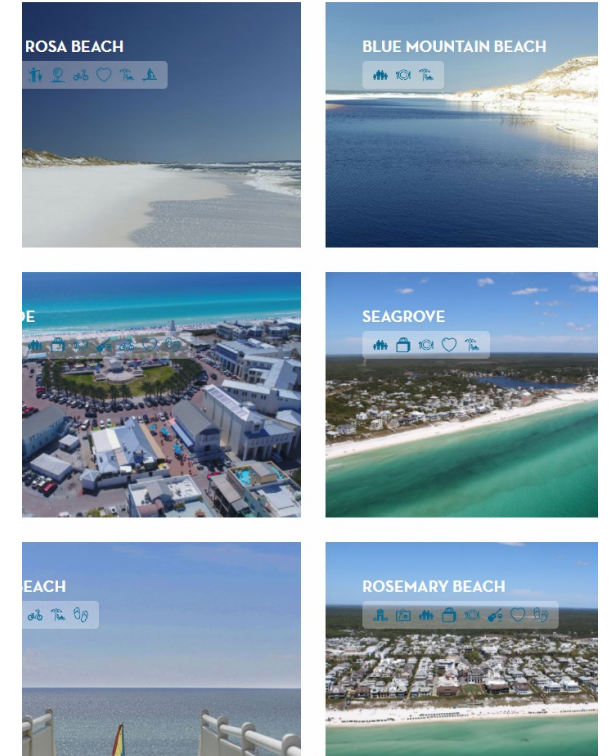
Friends/family **44%**



Vacation rental website**
37%



Search engines **27%**



Website for 1 of the 16
beach neighborhoods
20%

*Multiple responses permitted.

**This option not available in previous seasons.

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 **8.0 out of 10¹**



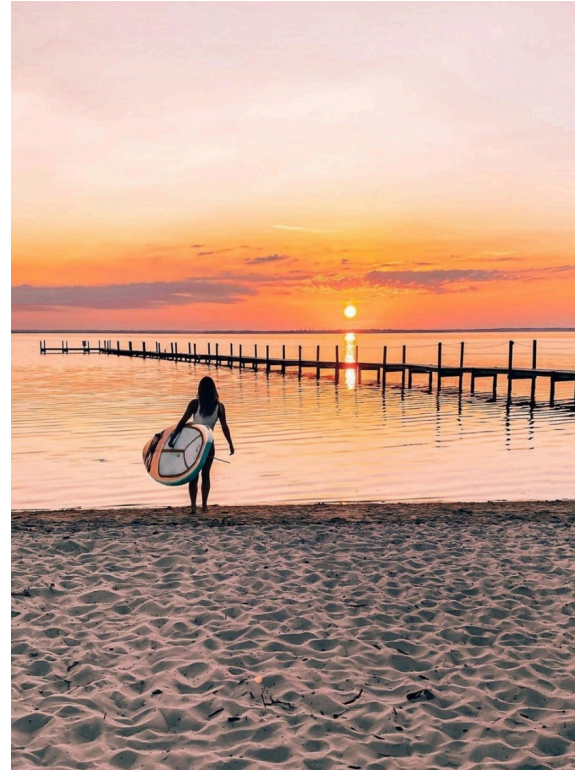
TOP REASONS FOR VISIT*



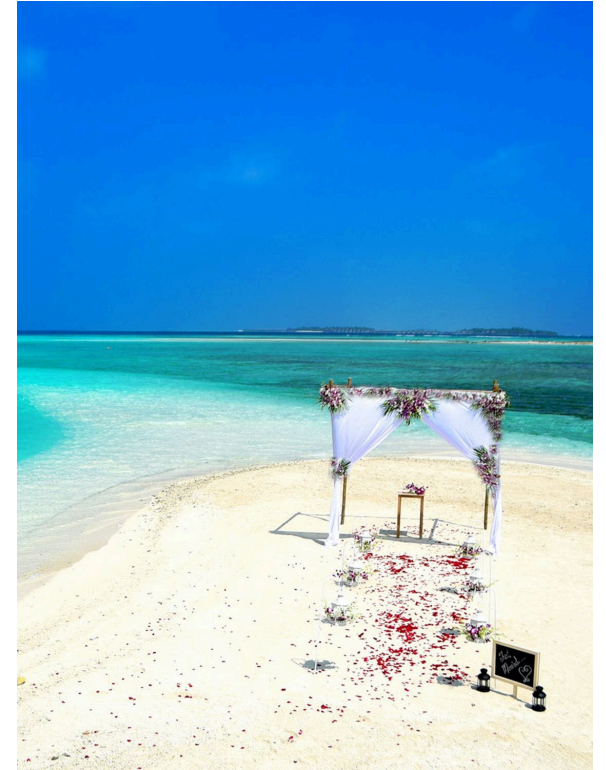
Relax & unwind **66%**



Family vacation **51%**



Annual routine **23%**



Special occasion **17%**

EXPOSURE TO ADVERTISING

- » **30%** of visitors have recently noticed promotions about South Walton
- » This information influenced **8%** of visitors to visit South Walton

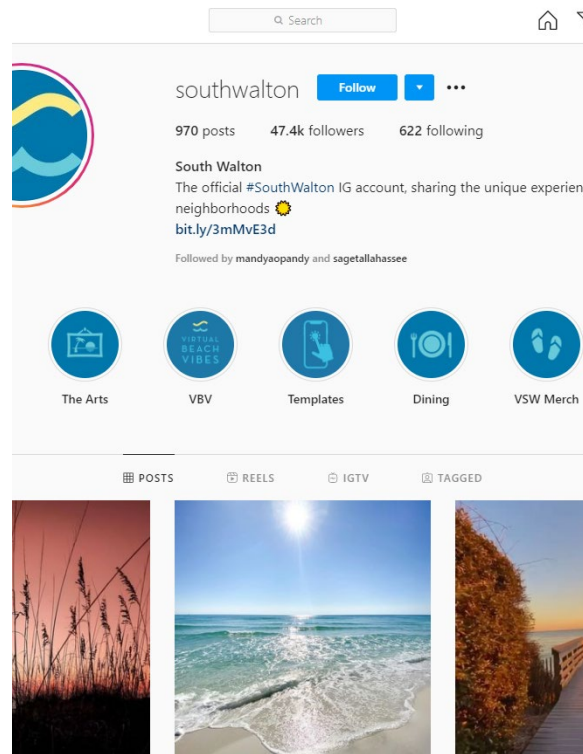


TOP SOUTH WALTON PROMOTIONS*

Base: 30% of visitors who notices advertising



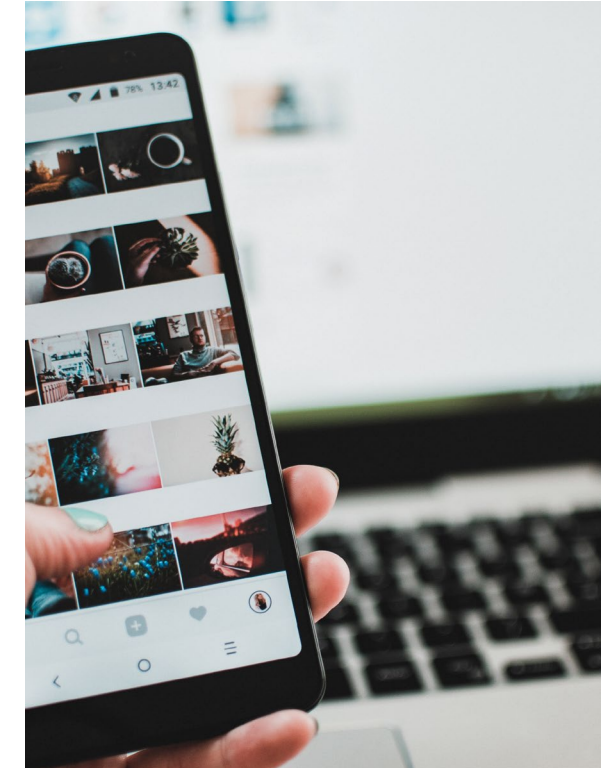
Television **23%**



South Walton social media
23%



Magazine article **22%**



Other social media
accounts **22%**

TOP BOOKING SOURCES

Vacation Rental
Company
41%

ROSEMARY
BEACH
COTTAGE RENTAL COMPANY



NEWMAN-DAILEY
RESORT PROPERTIES, INC.®

Directly with
hotel/condo
39%

Residence
Inn®
Marriott®



VRBO
HomeAway
11%



VacationRentals.com™
Part of the HomeAway Family

VISITOR TRANSPORTATION

- » **84%** of visitors drove to South Walton
- » **16%** who flew used the following airports:

50%

Northwest Florida Beaches
International Airport



35%

Destin-Ft. Walton Beach
Airport



8%

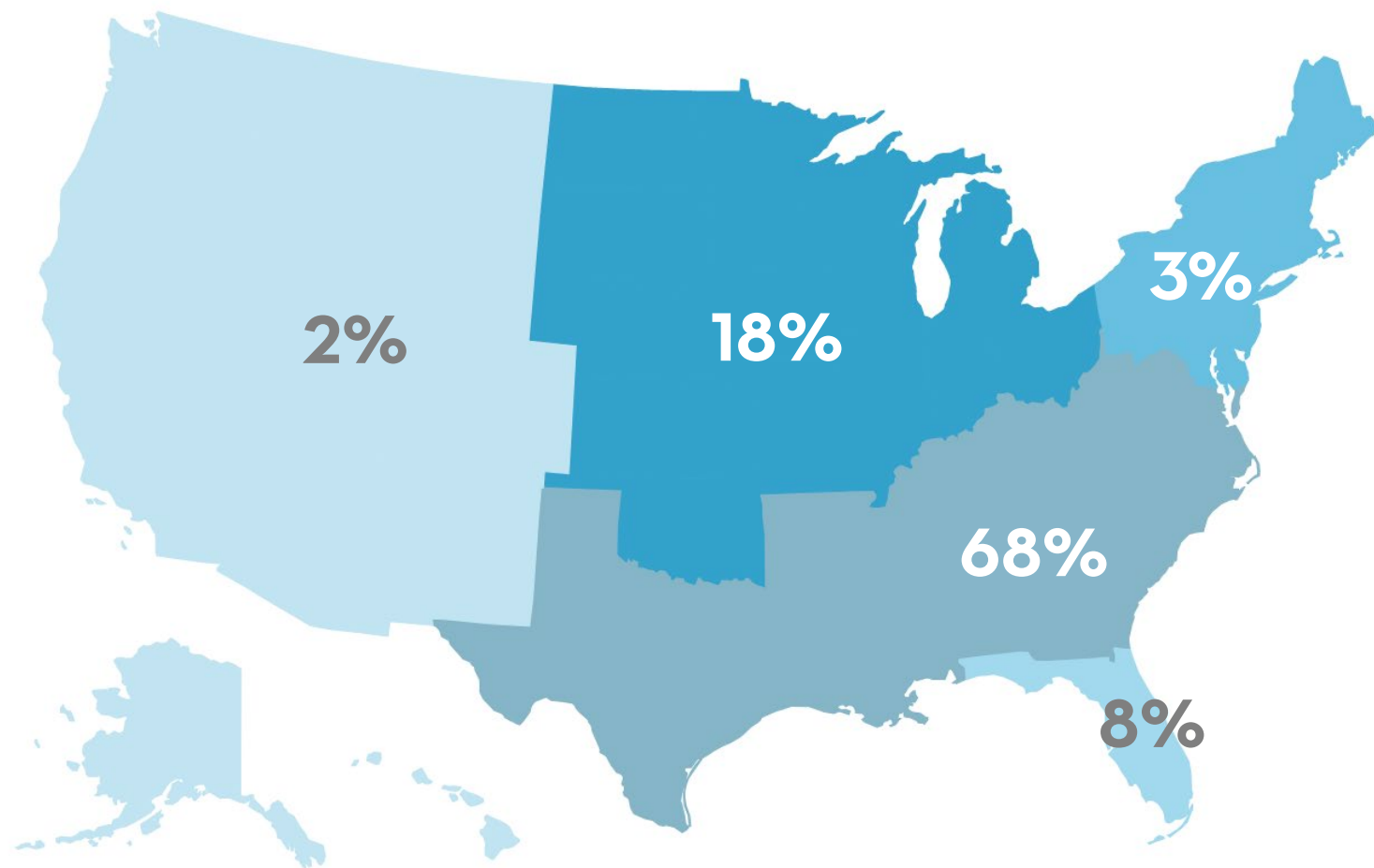
Pensacola International
Airport



VISITOR JOURNEY: TRAVEL PARTY PROFILE

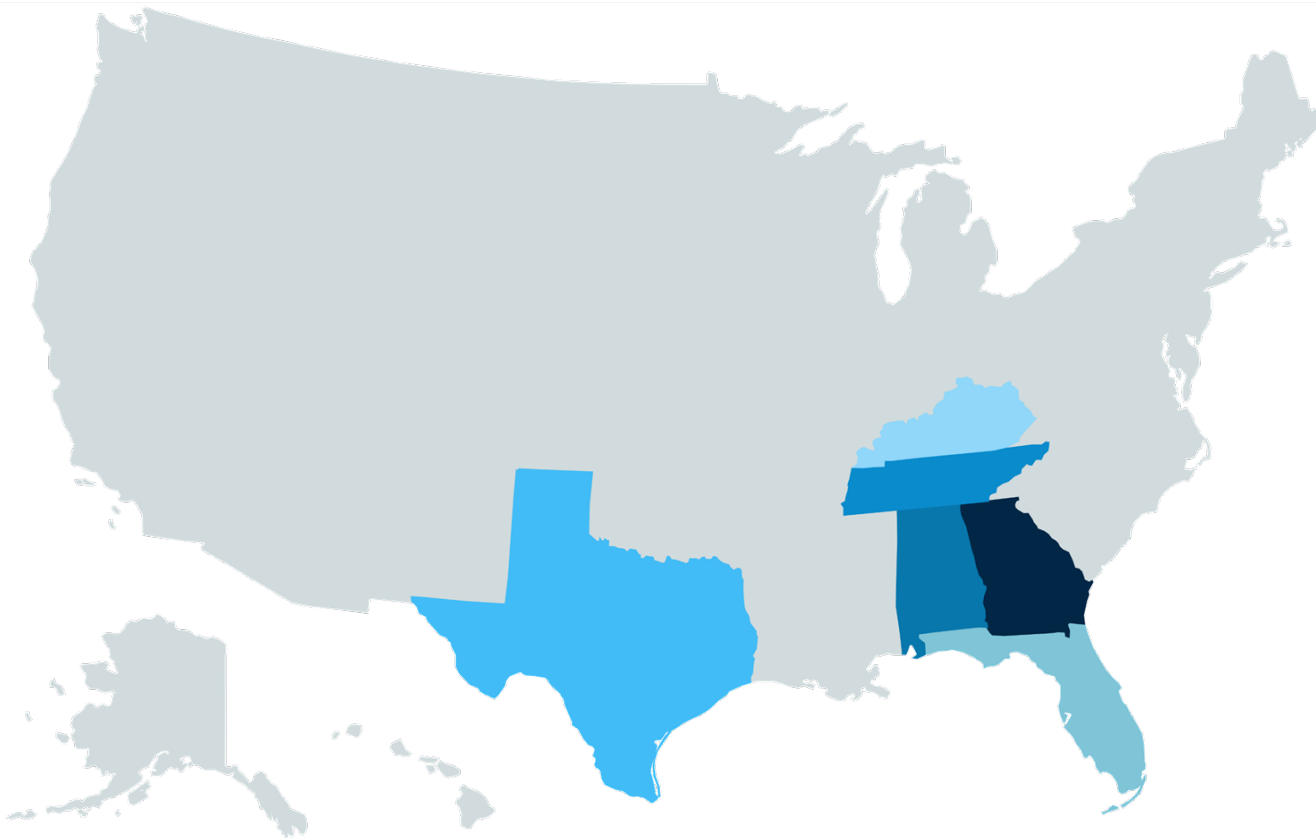


ORIGIN OF FALL VISITORS



1% of visitors traveled to South Walton from outside of the U.S.

ORIGIN OF FALL VISITORS



67% of visitors are from 6 states

- 18%** Georgia
- 14%** Alabama
- 13%** Tennessee
- 9%** Texas
- 8%** Florida
- 5%** Kentucky

47% of visitors are from 8 markets

- 16%** Atlanta
- 9%** Nashville
- 6%** Birmingham
- 4%** Dallas - Fort Worth
- 3%** New Orleans
- 3%** Pensacola - Mobile
- 2%** Houston
- 2%** Memphis

TRAVEL PARTY SIZE AND COMPOSITION

The typical visitor traveled in a party composed of **4.2** people



39% 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%¹**)
 - » Median household income of **\$157,100**
 - » Estimated average HHI = **\$205,500**
 - » From the Southeast (**76%**)

¹ Responses impacted by person more willing to be interviewed and who booked the trip.

VISITOR PROFILE: TYPICAL VACATIONER¹



» The typical **Vacationer** (1 – 10 nights):

» **55** years old

» Female (**61%**²)

» Median household income of **\$155,000**

» **40%** travel with children

» **85%** drive to the area

¹Travel parties who stayed 1-10 nights.

²Responses impacted by person more willing to be interviewed and who booked the trip.

VISITOR PROFILE: TYPICAL LONG-TERM¹ VISITOR



- » The typical **Long-Term** visitor:
 - » **62** years old
 - » Female (**59%²**)
 - » Median household income of **\$200,500**
 - » **36%** travel with children
 - » **88%** drive to the area

¹ Travel parties who stayed more than 10 nights.

² Responses impacted by person more willing to be interviewed and who booked the trip.

VISITOR PROFILE: TYPICAL DAY TRIPPER



- » The typical **Day Trip** visitor:
 - » **55** years old
 - » Female (**55%²**)
 - » Median household income of **\$111,400**
 - » **25%** travel with children
 - » **75%** drive to the area

¹ Responses impacted by person more willing to be interviewed and who booked the trip.

VISITOR JOURNEY: TRIP EXPERIENCE



TOP ACCOMMODATIONS

66% Condos, rental houses, etc.



13% Hotels



12% Personal home/condo



TOP VISITOR ACTIVITIES*

Beach **88%**



Restaurants **85%**



Relax and unwind **80%**



Family time, reading, cooking **63%**



Shopping, antiques **62%**



*Multiple responses permitted.

LENGTH OF STAY

- » Visitors spent **5.6*** nights in South Walton



*Visitors who stayed 30 or fewer nights.

FIRST-TIME AND EXPERIENCED VISITORS

- » **12%** were first-time visitors
- » **Nearly half** had visited more than 10 times



TRAVEL PARTY EXPENDITURES¹

- » Travel parties spent **\$789** a day
- » Travel parties spent **\$4,418** on their trip



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

BEACH SAFETY

- » **88%** of Fall visitors know there are flags posted along the beaches to indicate how safe it is to go into the water
- » Over **4 in 5** Fall visitors are aware of the beach flag warning meanings
- » **51%** of Fall visitors are aware of the consequences of entering the Gulf during double red flag conditions



VISITOR JOURNEY: POST TRIP EVALUATION



VISITOR SATISFACTION

- » Visitors gave South Walton a rating of **9.2¹** as a place to vacation
- » **79%** will definitely return to South Walton²



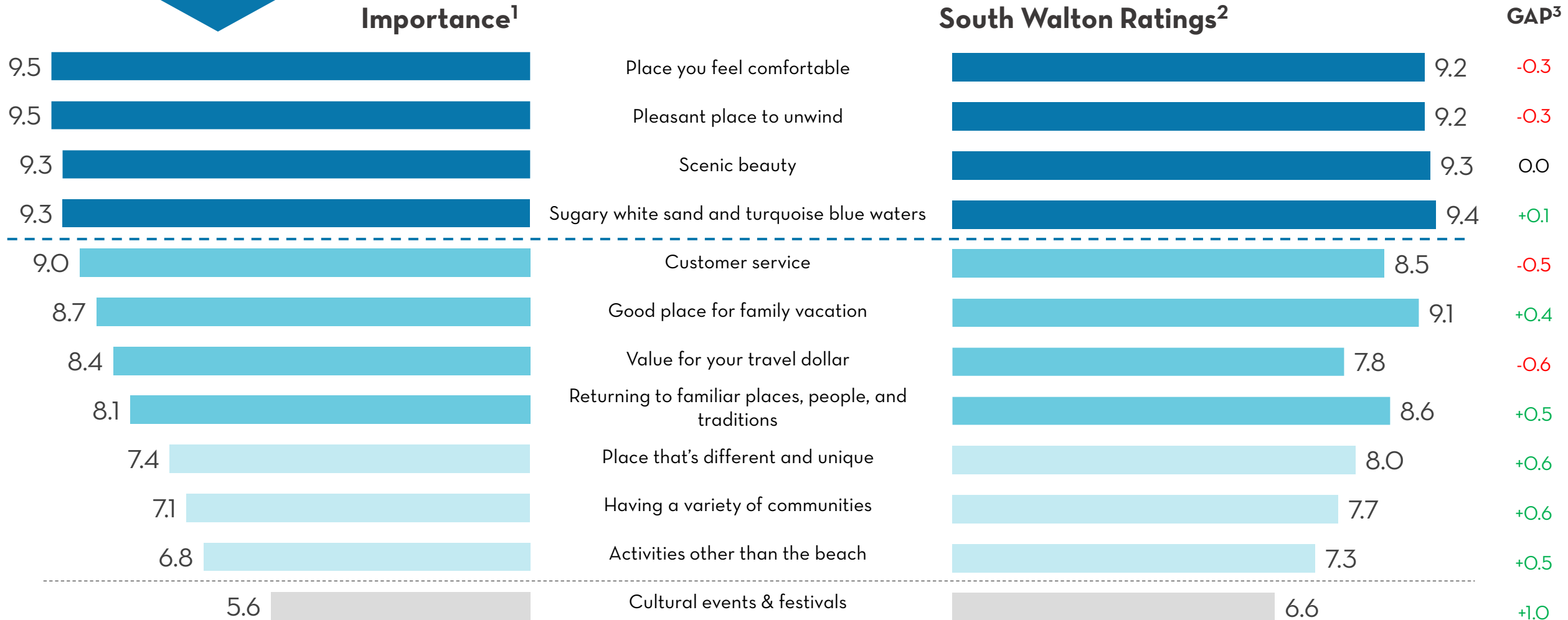
¹10 = Excellent; 1= Poor

²3% of all visitors will probably not return to South Walton for the following reasons:

1. Too crowded & 2. Too expensive.

DS downs & st. germain
RESEARCH

VACATION ATTRIBUTE IMPORTANCE VS. RATINGS



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

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

³ GAP equals the difference between the importance of an attribute and the rating of SW on that attribute.

For example, a "place you feel comfortable" is extremely important to visitors with a score of 9.5. Visitors rated SW as 9.2 on its ability to make them feel comfortable. Hence, the GAP is -0.3.

VISITOR DESCRIPTIONS OF SOUTH WALTON



Beautiful White Sand & Clear Water

"South Walton is my favorite place in the world. The beach is unparalleled, and the water is amazingly clear. We love the different beach communities and being able to walk or bike to many different places."

Relaxing & Stress Free

"Nice relaxing place to visit. Great for catching up on reading and just doing nothing. Beautiful sand, sunrises and sunsets."



Good Restaurants

"A beautiful beach - Caribbean like - amazing food with southern classic flair!"

YEARLY COMPARISONS

VISITOR PROFILE – FALL 2020 VS. 2021

Visitor Metrics	Fall 2020	Fall 2021
Travel party	4.3	4.2
Kids <20	40%	39%
Median age	55	55
Estimated median household income	\$159,100	\$157,100
Stayed in condo/rental house	60%	66%
Drove	87%	84%
Nights spent	5.7	5.6
Direct expenditures (travel party for entire trip)	\$4,098	\$4,418
1 st time visitor	10%	12%
10+ visits to South Walton	49%	46%

VISITOR PROFILE - FALL 2020 VS. 2021

Top Origin States	Fall 2020	Fall 2021
Georgia	21%	18%
Alabama	17%	14%
Tennessee	11%	13%
Texas	9%	9%
Florida	10%	8%

Origins - Regions	Fall 2020	Fall 2021
Southeast	83%	76%
Midwest	13%	18%
Northeast	2%	3%
West	1%	2%
International	1%	1%

VISITOR PROFILE – FALL 2020 VS. 2021

Top Visitor Activities	Fall 2020	Fall 2021
Beach	90%	88%
Restaurants	88%	85%
Relax and unwind	77%	80%
Family time, reading, cooking	56%	63%
Shopping, antiquing	53%	62%
Biking, running	35%	35%
Bars, nightclubs	30%	25%
State parks	19%	17%
Hiking, nature walks, etc.	16%	16%
Special events	11%	16%
Golf or tennis	18%	15%
Water sports	16%	15%
Attractions	15%	15%
Dune lakes	16%	10%
Art galleries, museums, cultural events	6%	9%
Spas	5%	8%
Business meetings, conferences	4%	5%
Other	2%	3%

VISITOR PROFILE – FALL 2020 VS. 2021

Visitor Metrics	Fall 2020	Fall 2021
Will return to South Walton	95%	97%
Rating for overall experience ¹	8.9	9.2
Viewed Visitors Guide ²	26%	18%
Planned trip 6+ months out	23%	21%
Used VisitSouthWalton.com	21%	13%
Used 1 of 16 beaches' websites	24%	20%
Use the term "South Walton"	23%	20%

DETAILED FINDINGS



VISITOR JOURNEY: PRE-VISIT

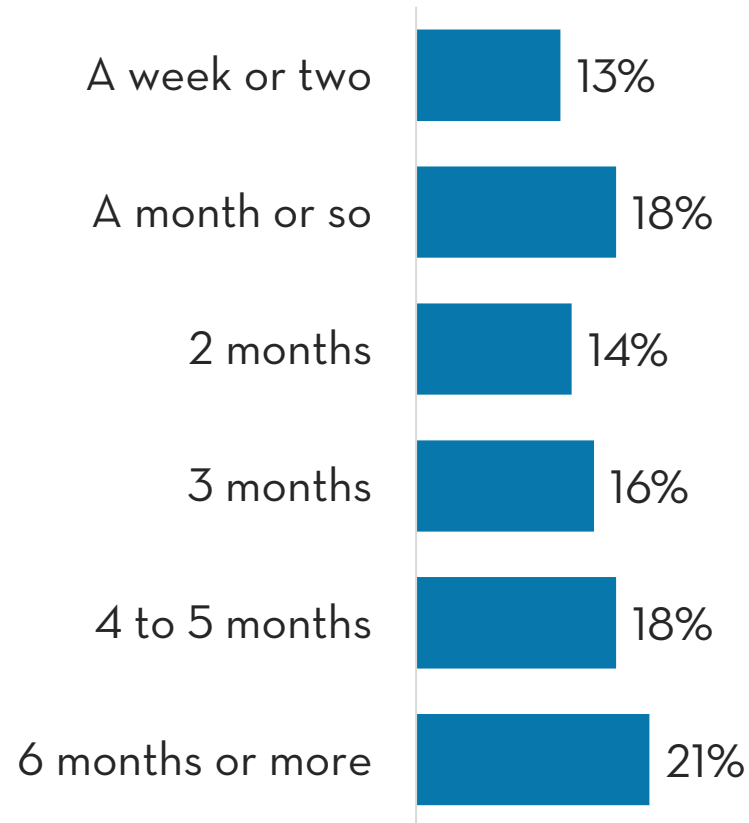


PLANNING CYCLE


Over half of visitors plan a Fall South Walton vacation at least **3 months out**

3 in 10 visitors to South Walton have **a short (a month or less) planning cycle**


Average trip planning cycle began **89 days** before the trip (**87 days** in 2020)



OTHER DESTINATIONS CONSIDERED



Over **half** (+6% points from 2020) of Fall visitors only considered 1 of the South Walton Beaches



20% use the term “South Walton” when referring to the area

Only considered 1 of the South Walton beaches

52%

Considered another 1 of the 16 South Walton beaches

39%

Considered vacationing outside of South Walton, but in FL

7%

Considered vacationing at a beach outside of FL

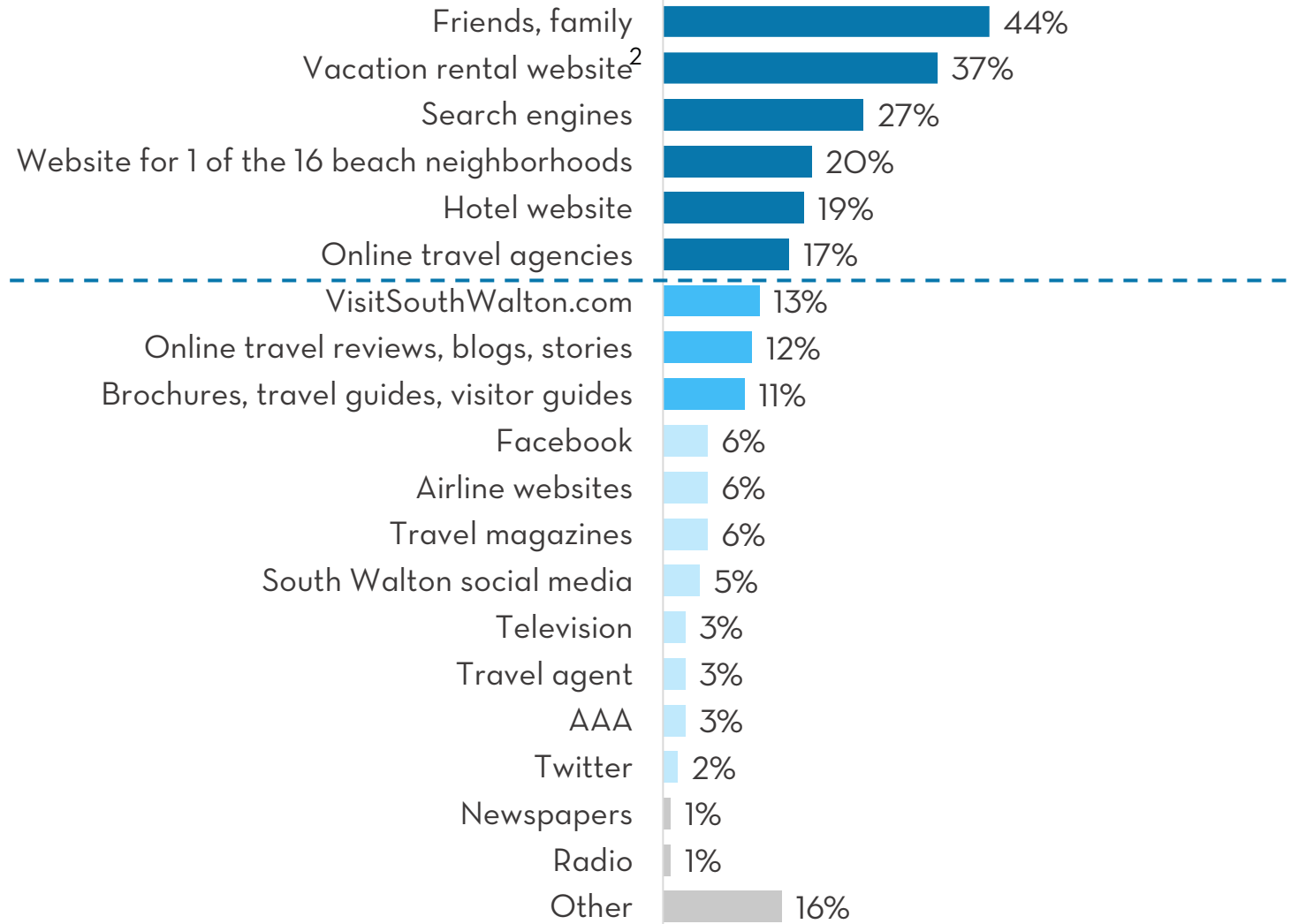
2%

TRIP PLANNING SOURCES¹

Over 2 in 5 visitors asked their friends and family for advice to help plan their trip to South Walton

Nearly 2 in 5 visitors used a vacation rental website to help plan their trip to South Walton

COVID-19 effects of increased use of DMO websites has waned as the usage of the Visit South Walton website decreased 8% points from 2020



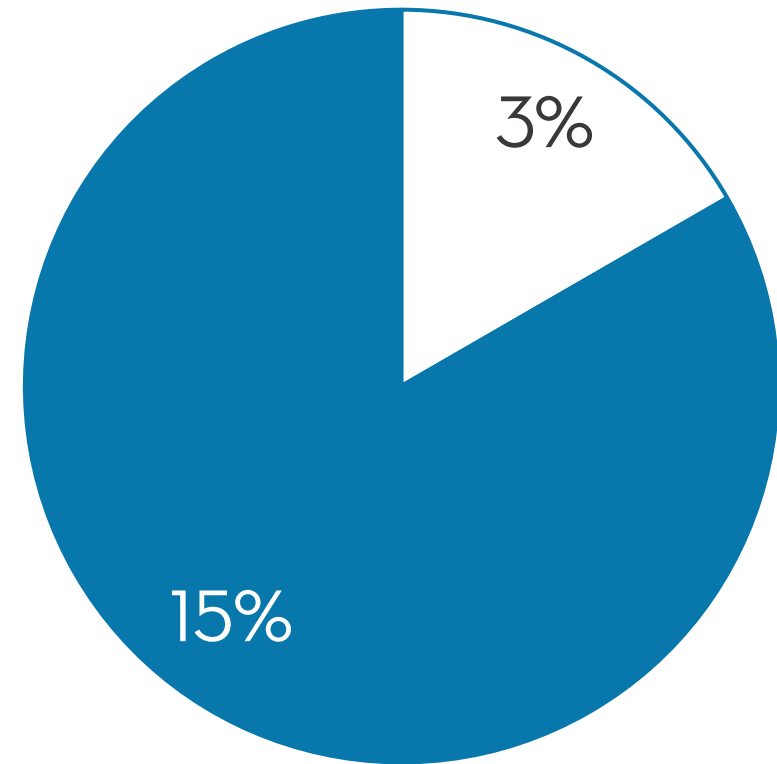
¹Multiple responses permitted.

²This option not available in previous seasons.

SOUTH WALTON VISITOR GUIDE

Nearly 1 in 5 visitors viewed a South Walton Visitors Guide before going to South Walton

Visitors Guide received a rating of **8.0 out of 10¹** (+0.3 points from 2020)



□ Print version ■ Online version

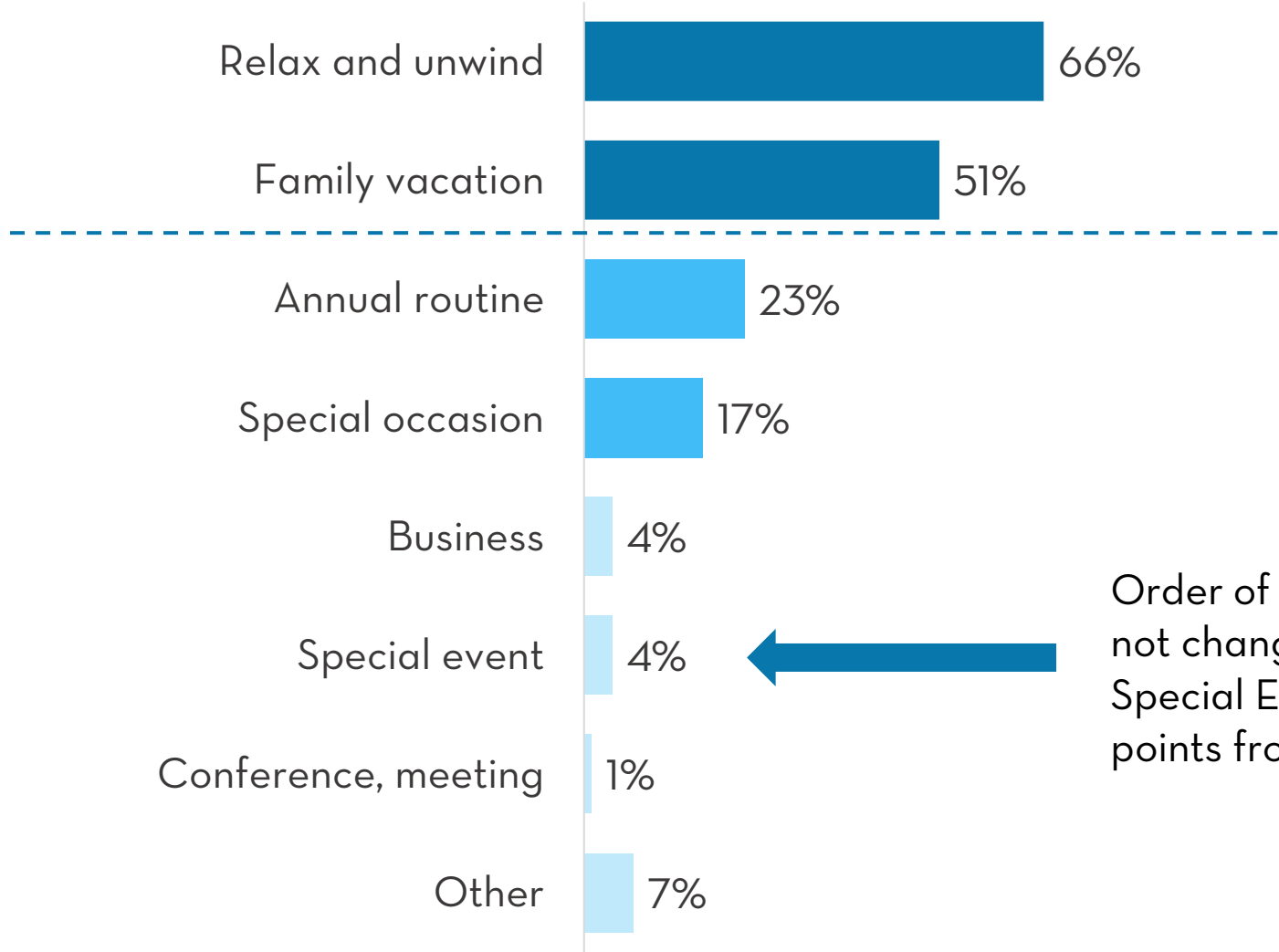
¹Rated on a 10-point scale where 10 is extremely useful and 1 is not at all useful.

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 did not change from 2020, though Special Events increased 2% points from 2020

SOUTH WALTON PROMOTIONS¹

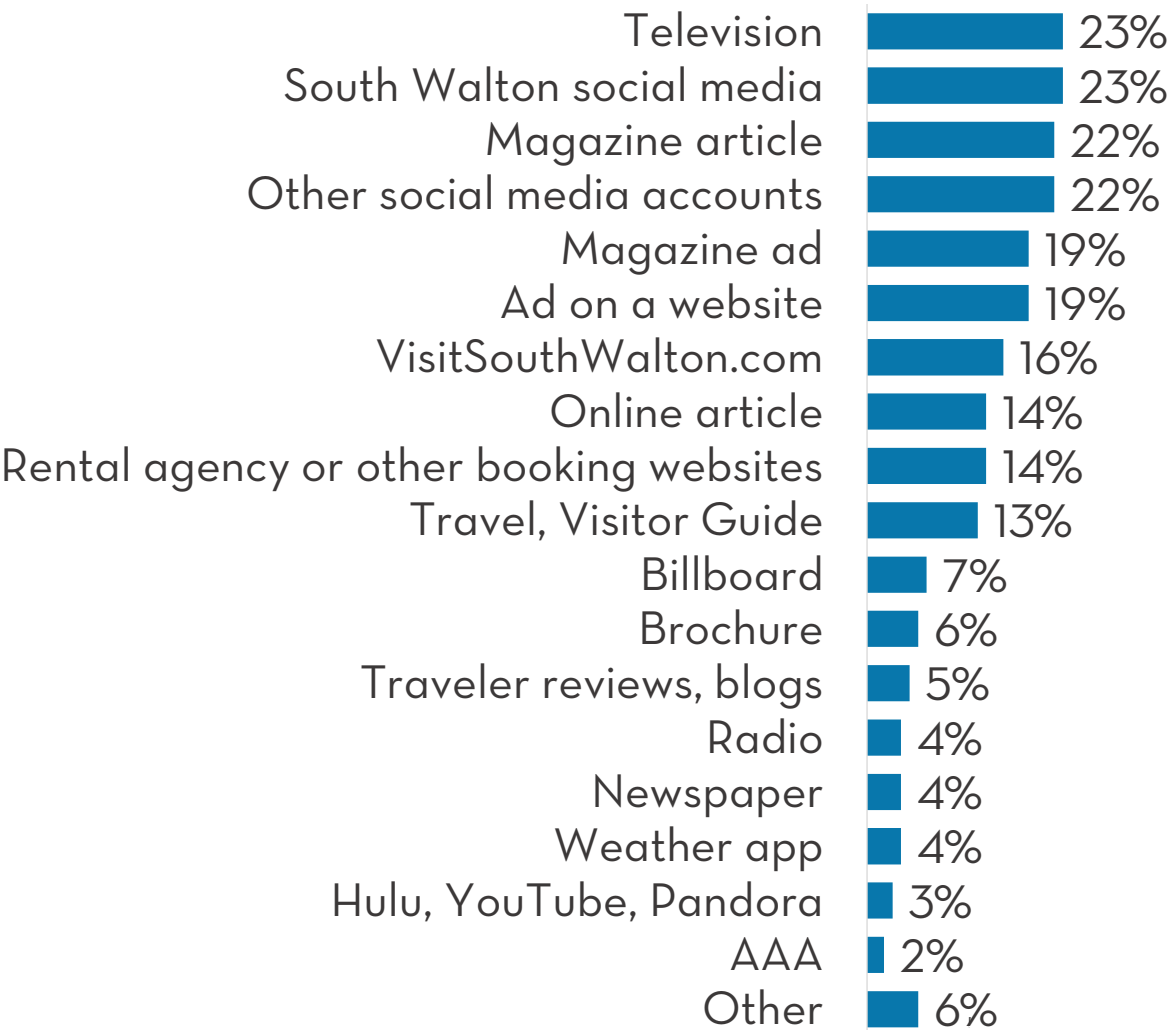


30% (+3% points from 2020) of Fall visitors have recently seen, read or heard advertising, promotions or travel stories about South Walton



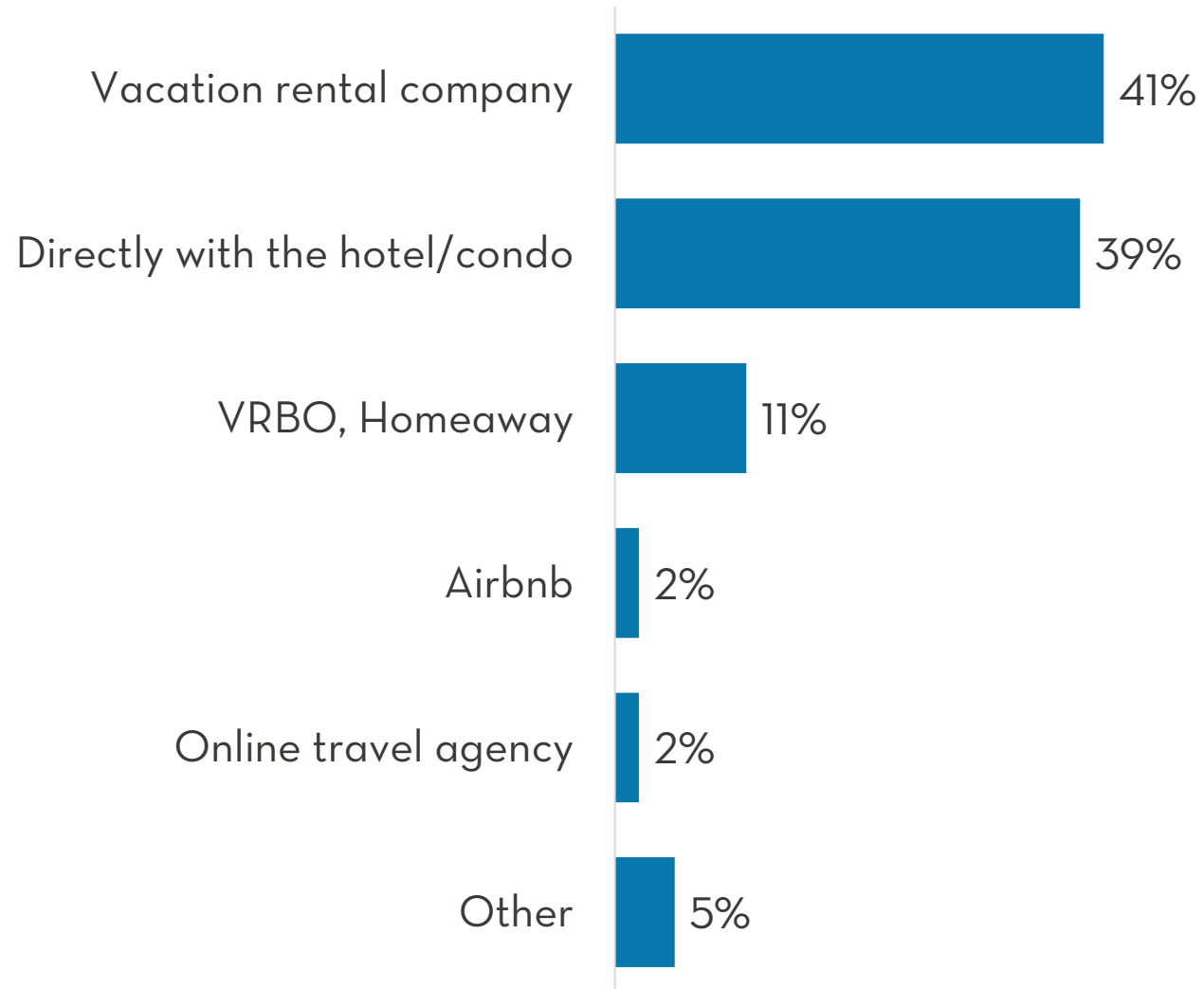
This information influenced **8%** (+1% point from 2020) of all visitors to visit South Walton

Base: **30%** of visitors who noticed advertising



¹Multiple responses permitted.


BOOKING ACCOMMODATIONS



VISITOR TRANSPORTATION

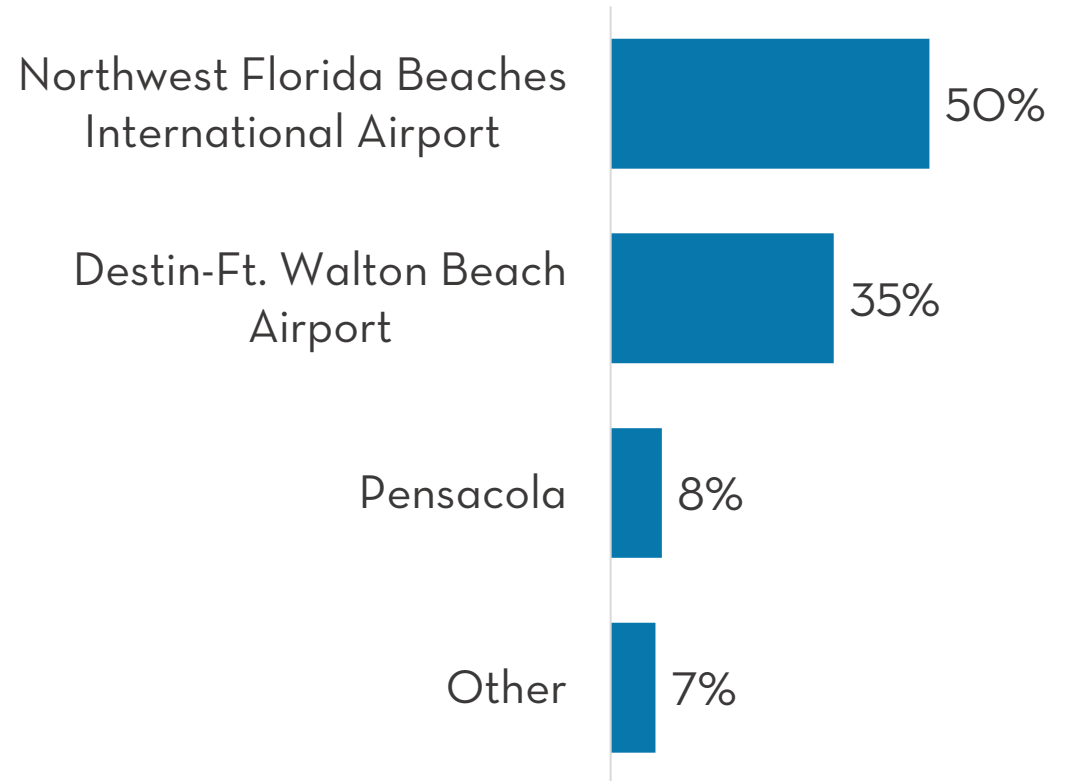


84% of Fall visitors drove to South Walton



2 in 5 (+10% points from 2020) of those who drove were aware that there were direct flights from their city to the South Walton area

16% who **flew** used the following airports:



VISITOR JOURNEY: TRAVEL PARTY PROFILE



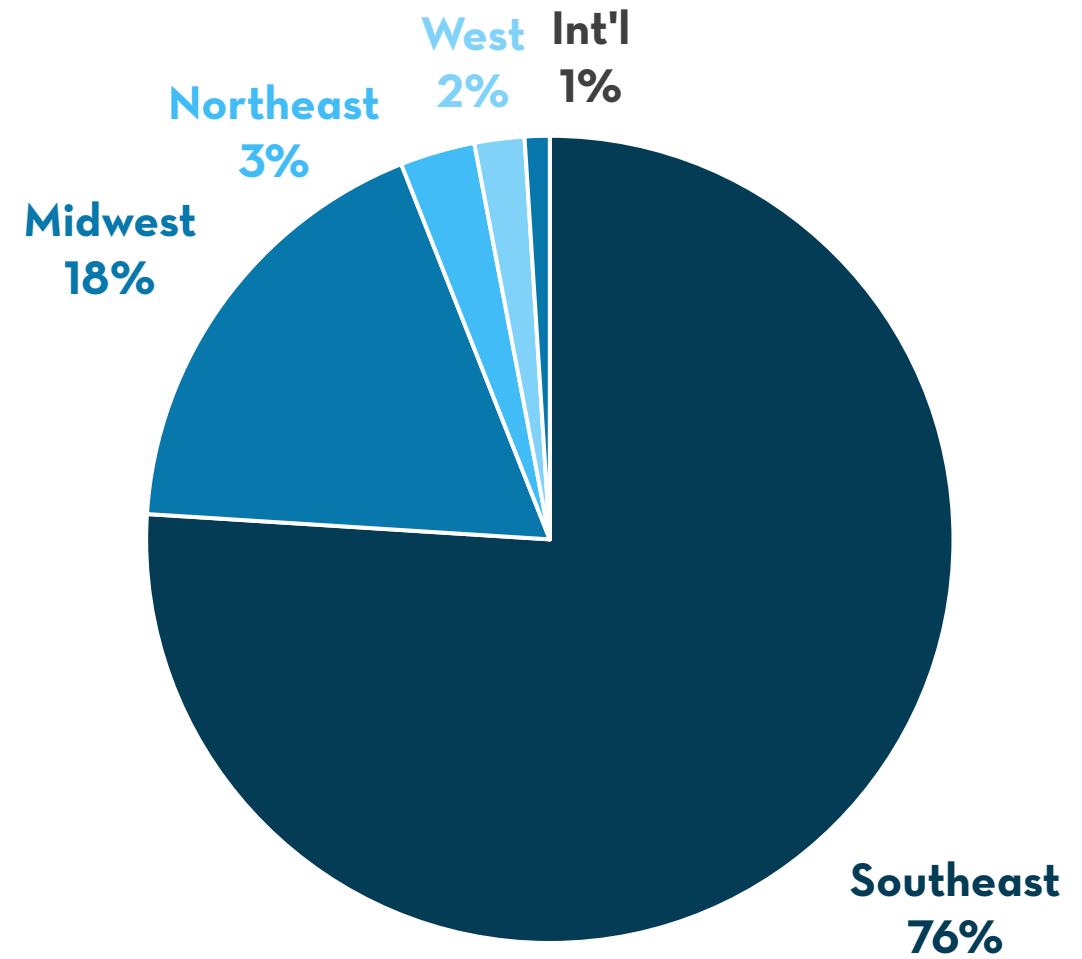
ORIGIN OF FALL VISITORS

State	% of Visitors
Georgia	18%
Alabama	14%
Tennessee	13%
Texas	9%
Florida	8%
Kentucky	5%
Ohio	4%
Louisiana	4%
Mississippi	4%
Indiana	3%
Missouri	2%
North Carolina	2%
Arkansas	2%



ORIGIN OF FALL VISITORS

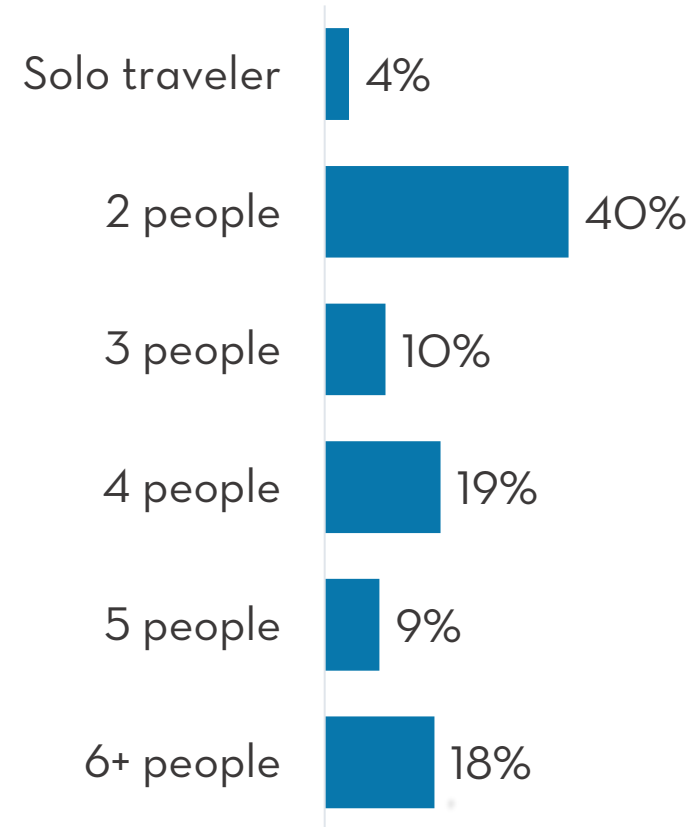
Top Origin Markets	% of Visitors
Atlanta	16%
Nashville	9%
Birmingham	6%
Dallas - Fort Worth	4%
New Orleans	3%
Pensacola - Mobile	3%
Houston	2%
Huntsville	2%
Memphis	2%
Louisville	2%
Columbus, MS	2%
Chattanooga	2%
Montgomery	2%
Indianapolis	2%



TRAVEL PARTY SIZE AND COMPOSITION

Visitors traveled in a party composed of **4.2** people

39% of visitors traveled with children under the age of 20

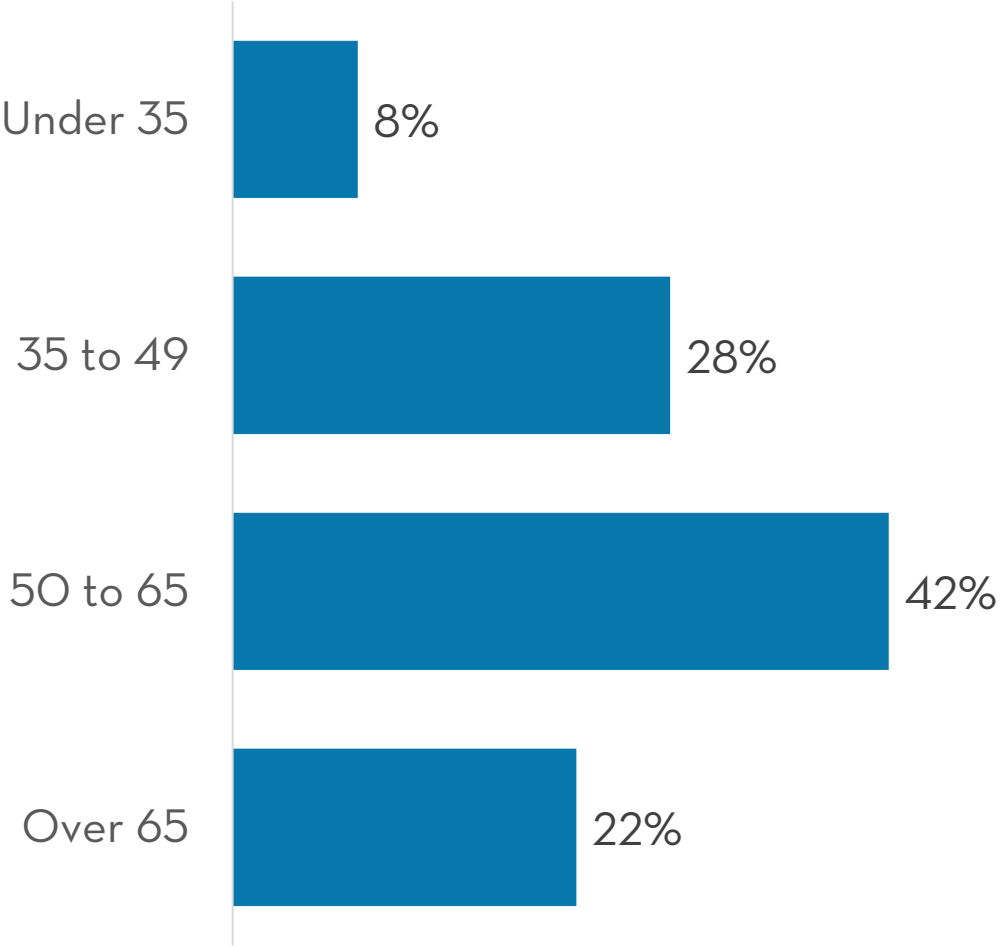


¹Multiple responses permitted.

AGE OF FALL VISITORS

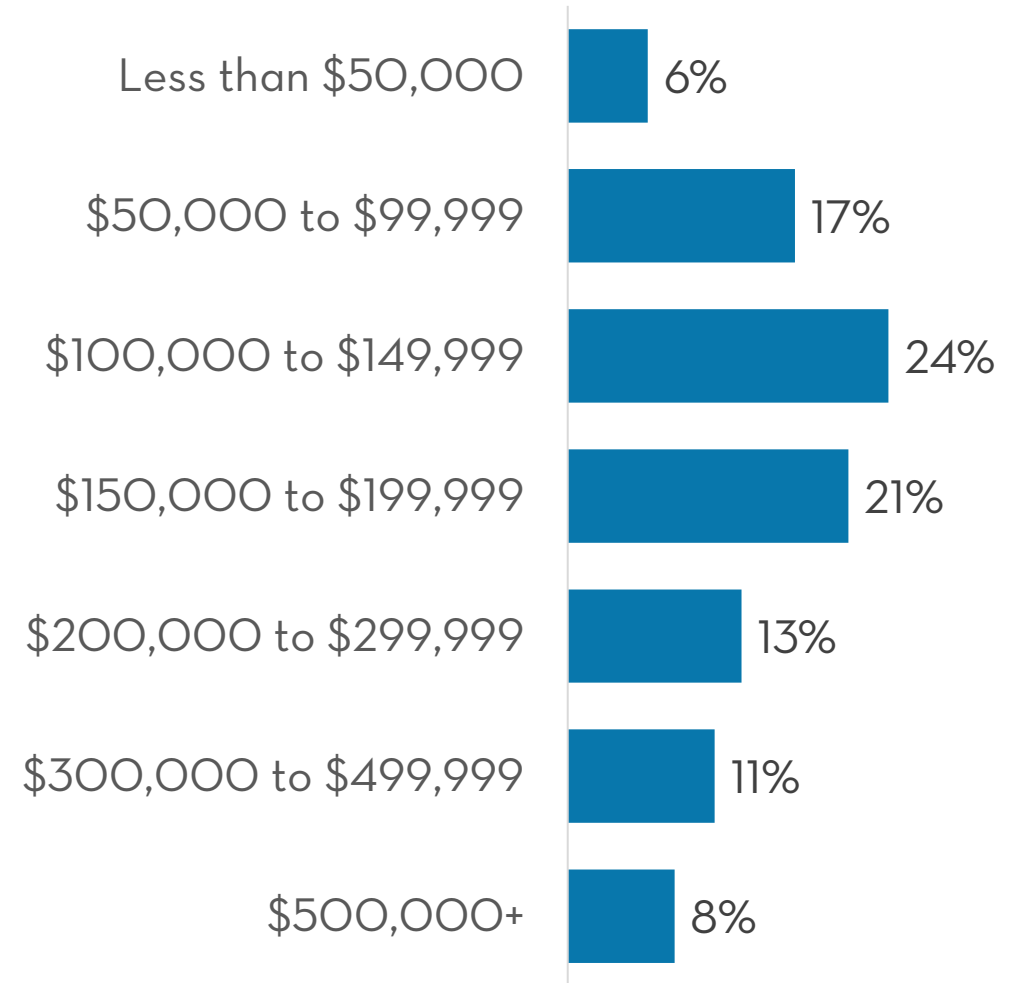


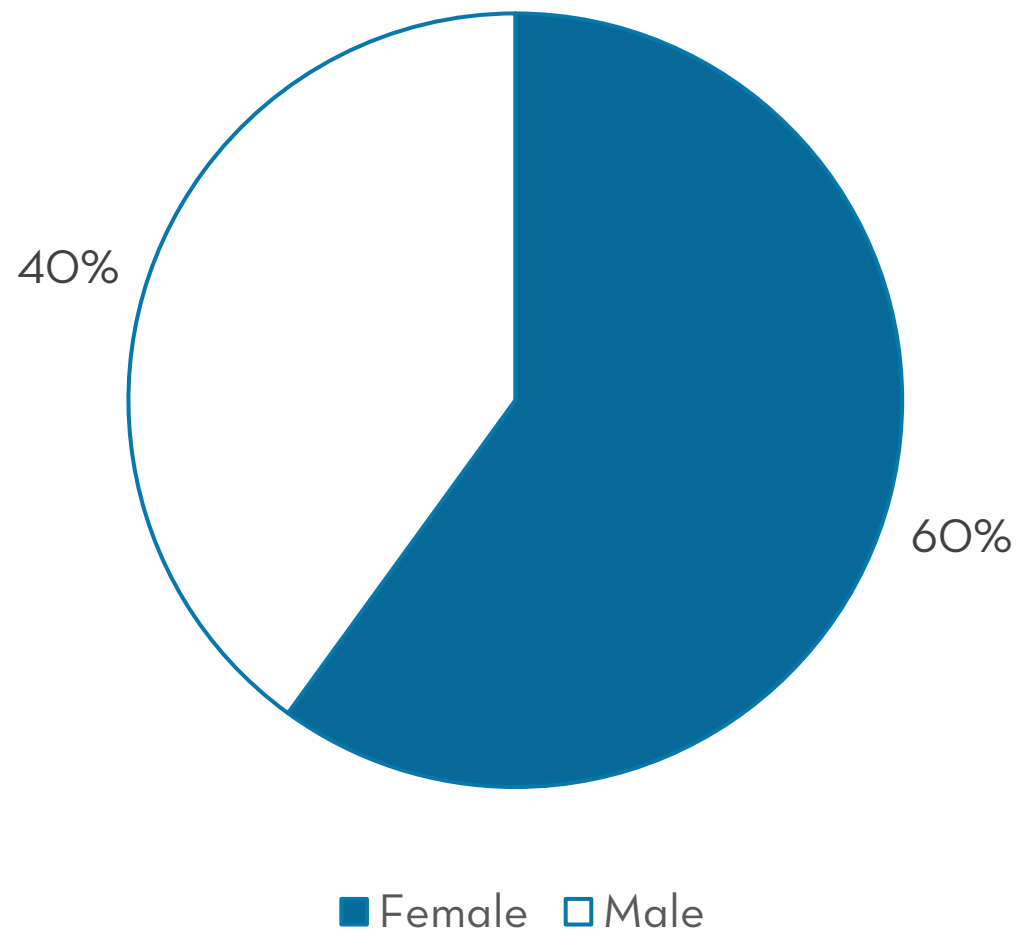
Median age of Fall visitors was **55 years old**



TOTAL HOUSEHOLD INCOME IN 2020

Fall visitors had a **median** household income of **\$157,100**, while estimated **average** household income was **\$205,500**



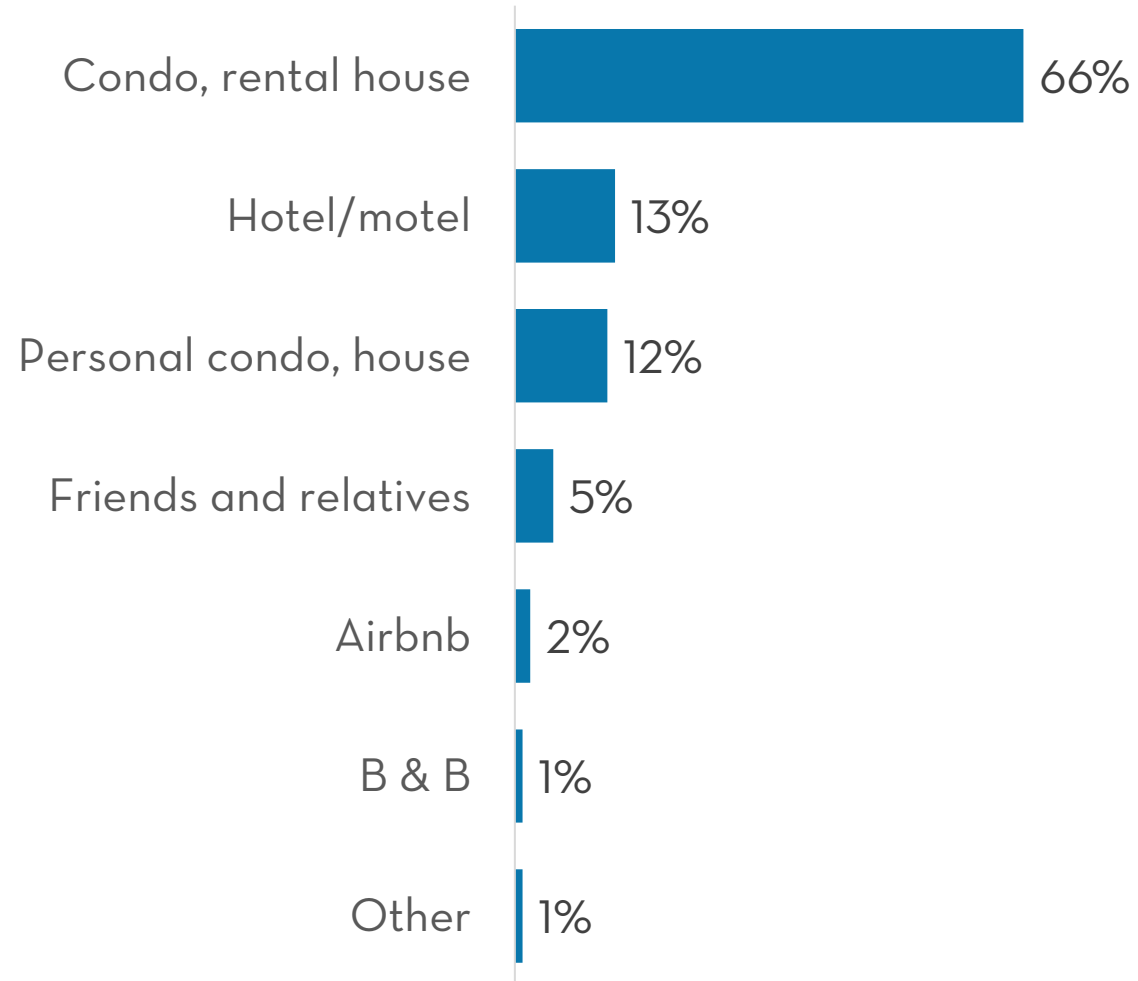


Responses impacted by person more willing to be interviewed

VISITOR JOURNEY: TRIP EXPERIENCE



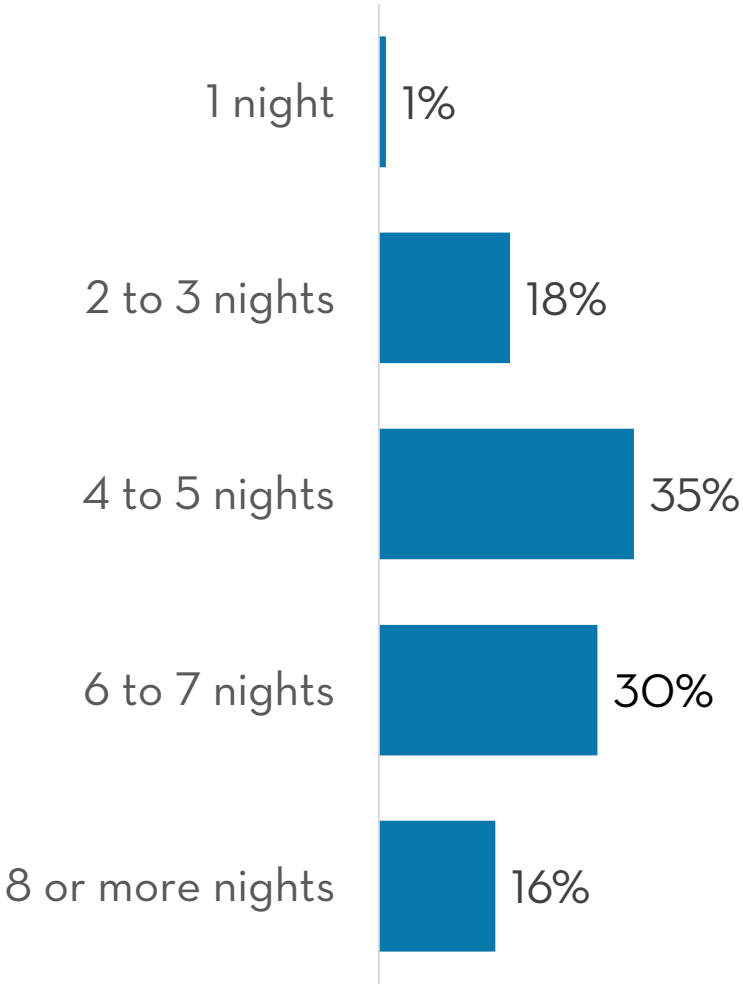
VISITOR'S PAID ACCOMMODATIONS



LENGTH OF STAY



Fall visitors¹ spent an average of **5.6** nights in South Walton



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

NUMBER OF VISITS TO SOUTH WALTON



12% of Fall visitors were visiting for the first time



Nearly half of Fall visitors have visited South Walton more than 10 times

That was my first time



12%

2 - 3



13%

4 - 5



12%

6 - 10



17%

11 - 20



20%

21+



26%

VISITOR ACTIVITIES¹

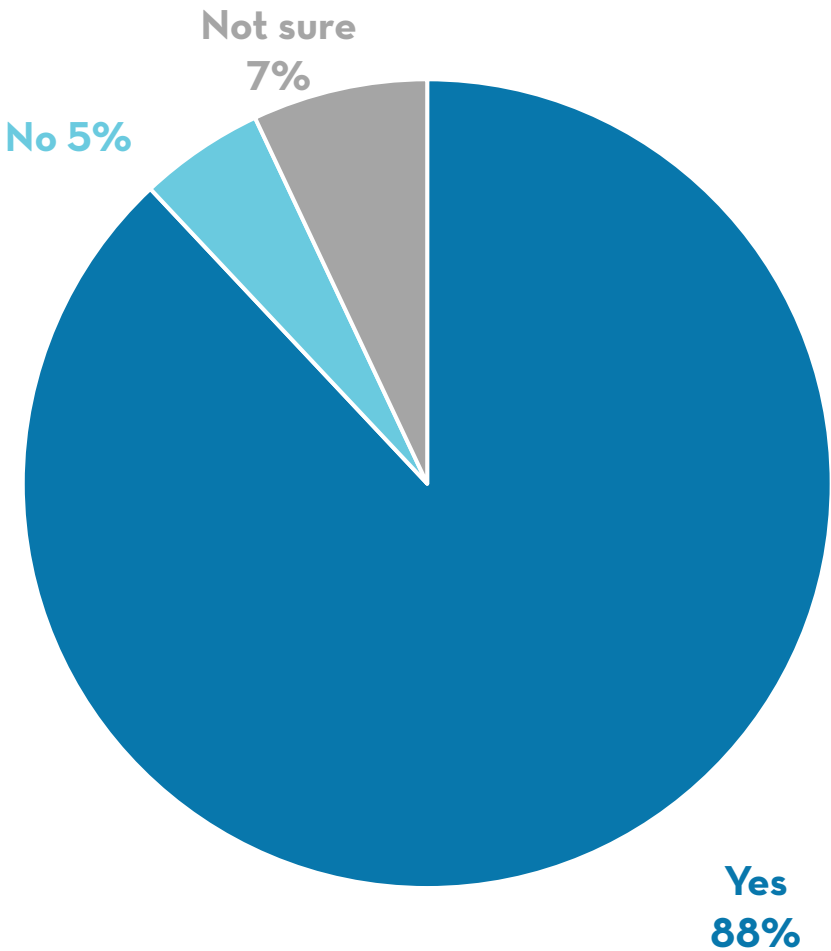


¹Multiple responses permitted.

BEACH SAFETY



88% of Fall visitors know there are flags posted along the beaches to indicate how safe it is to go into the water



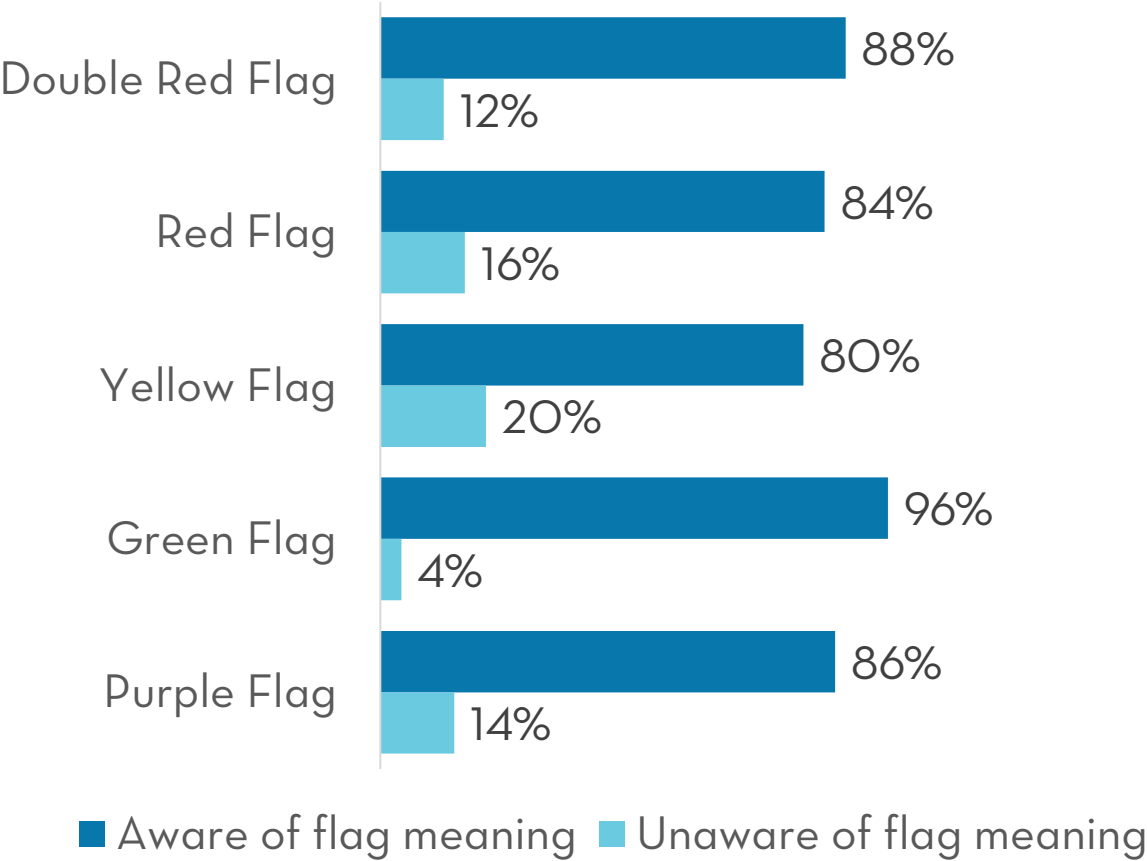
BEACH FLAG AWARENESS



Over 4 in 5 visitors are aware of the meaning of each flag color



51% of Fall visitors are aware that entering the Gulf during double red flag conditions can result in a \$500 fine and criminal charges



TYPICAL SOUTH WALTON TRAVEL PARTY EXPENSES¹

Visitor Metrics ¹	Average Daily Expenditure	Total Trip Expenditure
Accommodations	\$370	\$2,072
Restaurants	\$150	\$840
Groceries	\$52	\$291
Shopping	\$118	\$661
Entertainment	\$44	\$246
Transportation	\$46	\$258
Other	\$9	\$50
Total	\$789	\$4,418

¹ Visitors who stayed 30 nights or fewer.

VISITOR JOURNEY: POST-TRIP EVALUATION



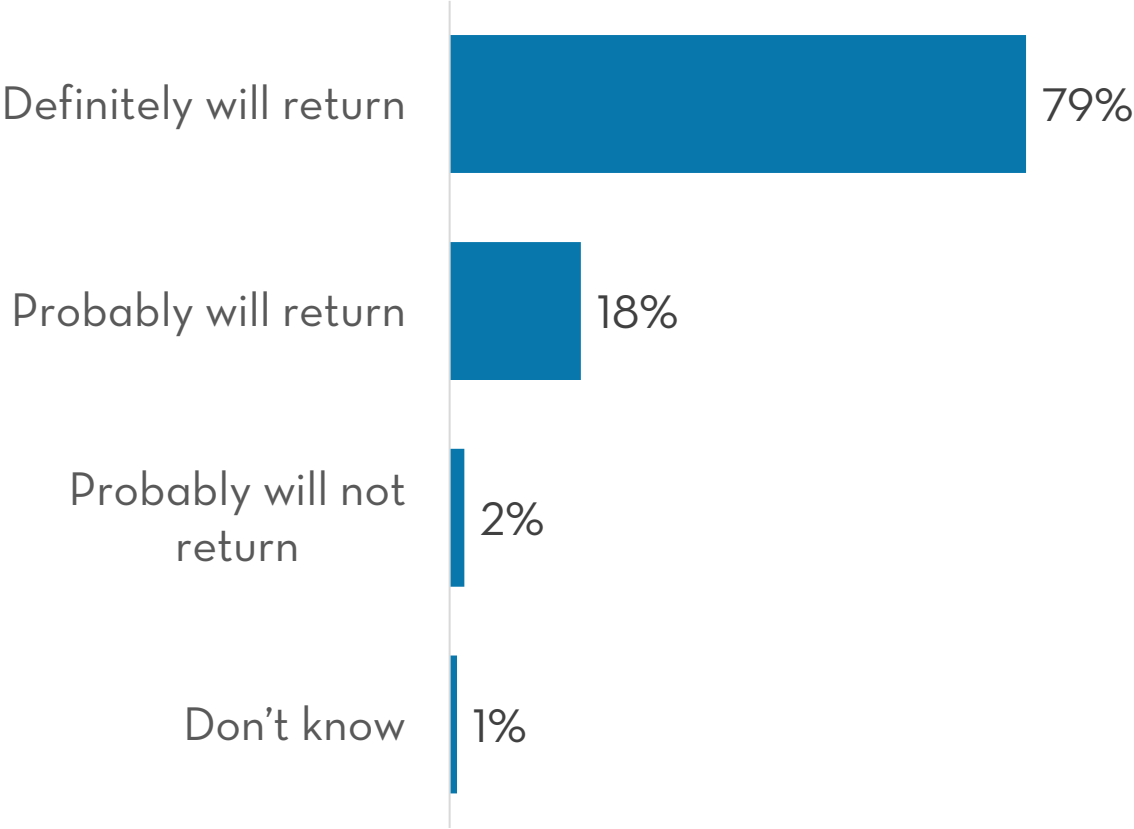
SATISFACTION WITH SOUTH WALTON



Visitors gave South Walton a rating of **9.2¹** as a place to vacation.

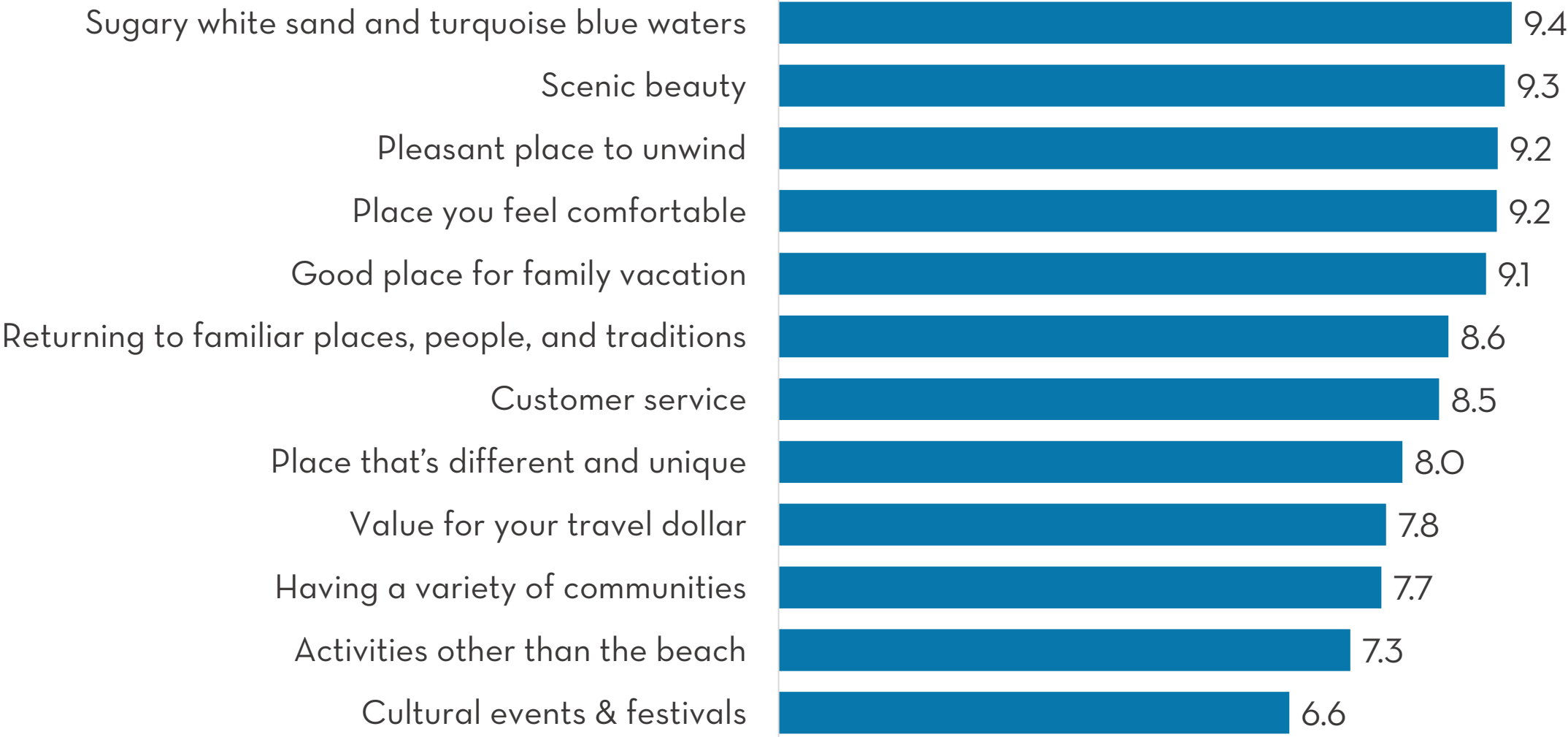


79% (+7% points from 2020) will definitely return to South Walton.²



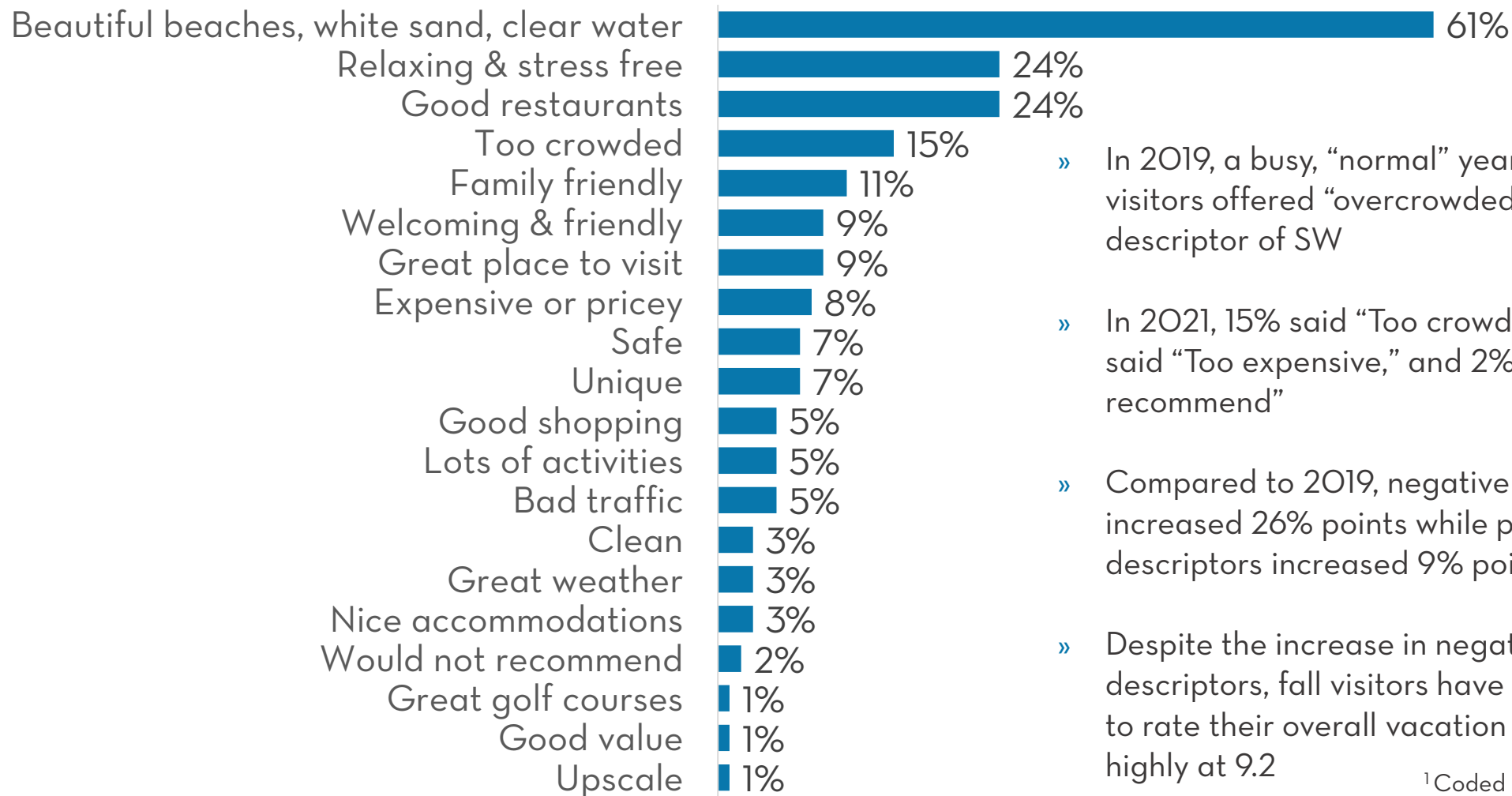
¹10 = Excellent; 1= Poor
²3% of all visitors will probably not return to South Walton for the following reasons:
1. Too crowded & 2. Too expensive.

RATING SOUTH WALTON¹



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

VISITOR DESCRIPTIONS OF SOUTH WALTON¹



- » In 2019, a busy, “normal” year, 4% of visitors offered “overcrowded” as a descriptor of SW
- » In 2021, 15% said “Too crowded,” 8% said “Too expensive,” and 2% “would not recommend”
- » Compared to 2019, negative descriptors increased 26% points while positive descriptors increased 9% points
- » Despite the increase in negative descriptors, fall visitors have continued to rate their overall vacation experience highly at 9.2

¹ Coded verbatim responses.
Multiple responses permitted.

AREA DESCRIPTIONS*



Beautiful Beaches/White Sand/Clear Water

“South Walton is my favorite place in the world. The beach is unparalleled, and the water is amazingly clear. We love the different beach communities and being able to walk or bike to many different places.”

Beautiful Beaches/White Sand/Clear Water

“White beaches and beautiful water. Different beach housing options, with busier and quieter areas. Good seafood restaurants.”

Beautiful Beaches/White Sand/Clear Water

“Gorgeous beach. Diverse shopping. Good restaurants.”

*Coded open-ended responses.
Multiple responses permitted.

AREA DESCRIPTIONS*



Relaxing & Stress Free

"Relaxing area with the prettiest beaches anywhere. Great places to eat."

Relaxing & Stress Free

"Nice relaxing place to visit. Great for catching up on reading and just doing nothing. Beautiful sand, sunrises and sunsets."

Relaxing & Stress Free

"Great place to unwind, meet new people, eat wonderful food and enjoy beautiful white beaches."

*Coded open-ended responses.
Multiple responses permitted.

AREA DESCRIPTIONS*



Good Restaurants

"Great getaway for relaxation and rest. Not far from Birmingham, easy route to get there, love the variety of restaurants to dine at."

Good Restaurants

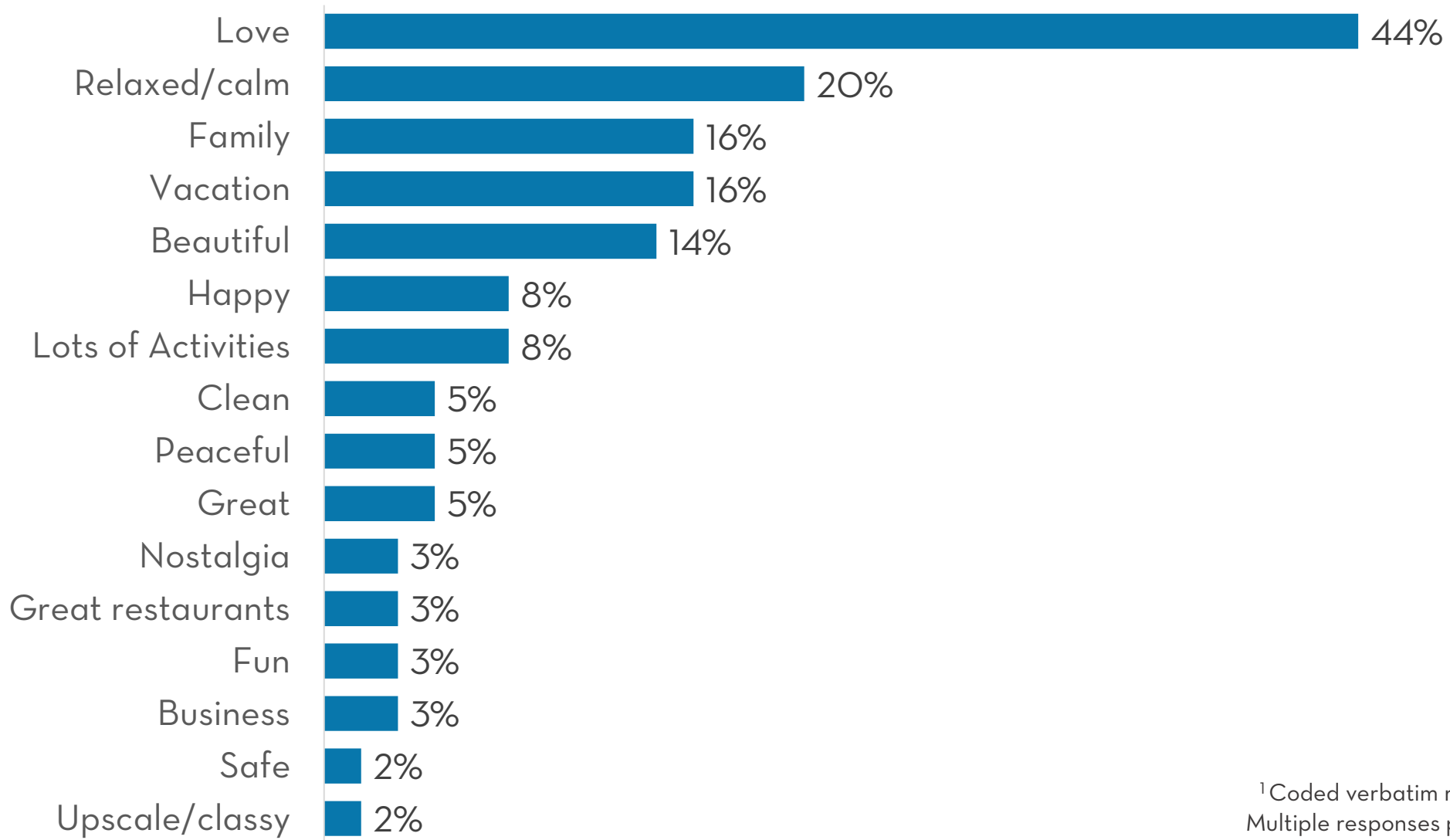
"A beautiful beach - Caribbean like - amazing food with southern classic flair!"

Good Restaurants

"Good place to get beach time and great food! Not too crowded."

*Coded open-ended responses.
Multiple responses permitted.

EMOTIONS ASSOCIATED WITH SOUTH WALTON¹



¹ Coded verbatim responses.
Multiple responses permitted.

VISIT SOUTH WALTON

Fall 2021 Visitor Tracking Study September 2021 - November 2021

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