

# VISIT SOUTH WALTON

## Visitor Tracking Study

Fall 2019  
(September, October, November)



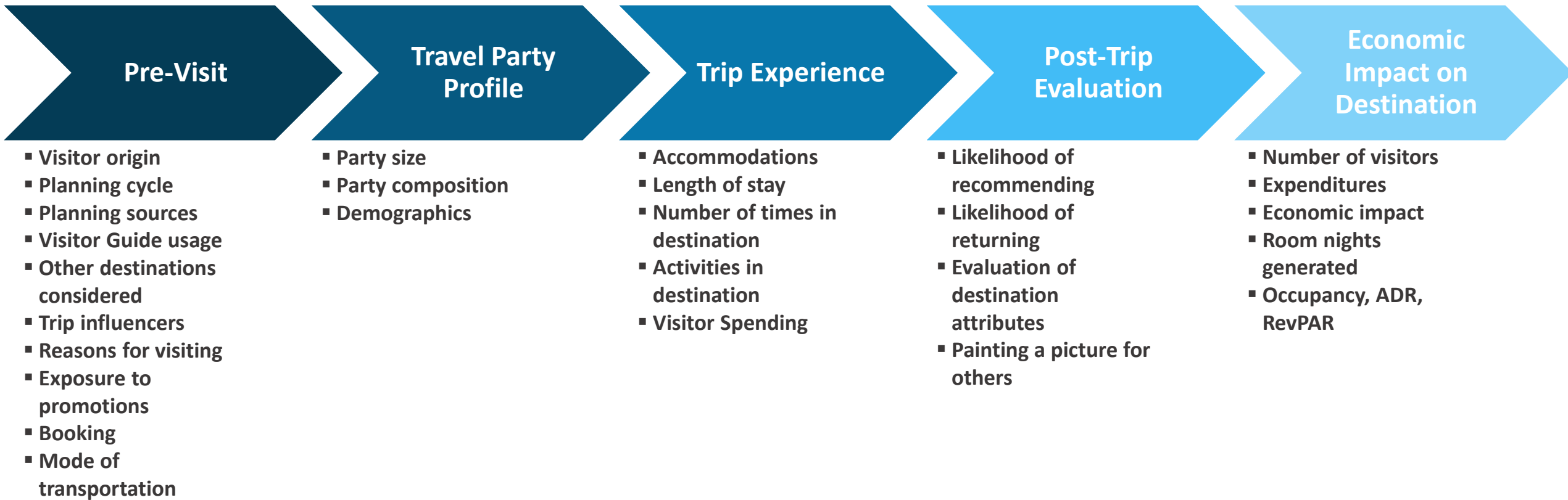
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# STUDY OBJECTIVES: MAP THE VISITOR JOURNEY



## 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 interviews with 597 Fall visitors who traveled to South Walton between September and November 2019.

\*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. 172 interviews were conducted via face-to-face interviews along the beach and in public areas.

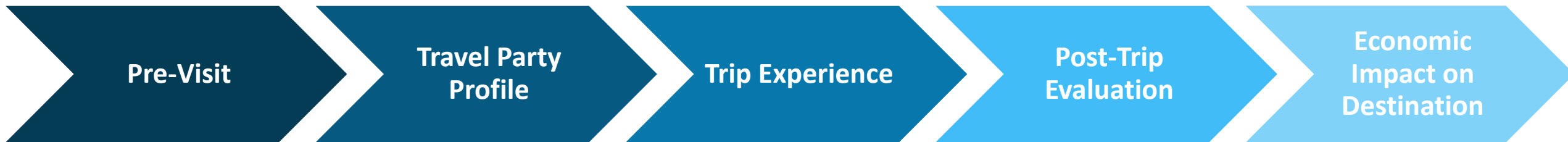


# EXECUTIVE SUMMARY



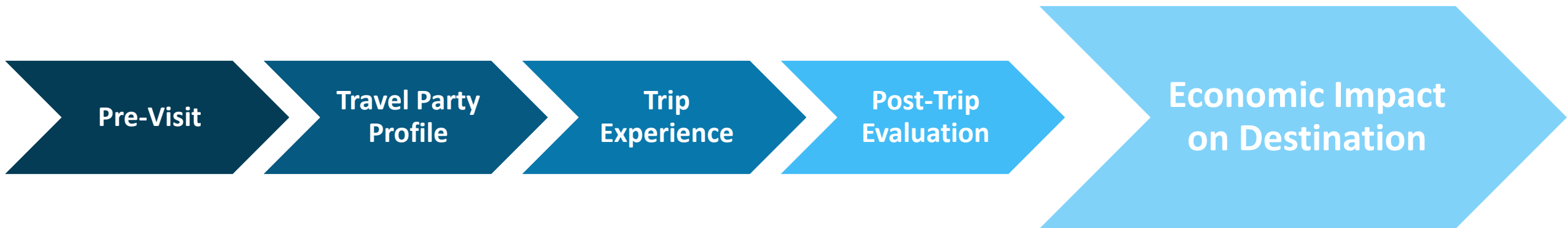
# VISITOR JOURNEY: ECONOMIC IMPACT

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 2018 VS. 2019

A 6% increase in active units from Fall 2018 (13,229) to Fall 2019 (14,048) softened the blow of negative property metrics, resulting in an 8.6% decrease in TDT.

Number of visitors was down slightly (-3.0%) as more Visiting Friends and Relatives (VFRs) and day trippers compensated for fewer visitors staying in paid accommodations. Spending was down more (-6.0%) since VFRs and day trippers spend less on paid accommodations.

With occupancy off nearly 10% and ADR virtually stable, RevPAR was down over 10%.

Property Statistics	Fall 2018	Fall 2019	% Change
Room nights	579,100	540,900	-6.6%
Total visitors	639,500	620,500	-3.0%
TDT collections	\$4,710,885	\$4,306,778	-8.6%
Direct spending	\$673,644,100	\$633,035,600	-6.0%
Economic impact	\$996,993,300	\$936,892,700	-6.0%
Occupancy	46.5%	41.9%	-9.9%
Room rates	\$255.95	\$254.48	-0.2%
RevPAR	\$119.02	\$106.63	-10.4%

*Note:* Fall 2018 numbers were abnormally high due to recovery efforts related to Hurricane Michael. When comparing Fall 2019 to Fall 2017, the number of visitors, TDT collections, direct spending, economic impact, and room rates were slightly up while room nights, occupancy, and RevPAR were slightly down.

**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

**41.9%**

Occupancy

↓ 9.9%

**\$254.48**

ADR

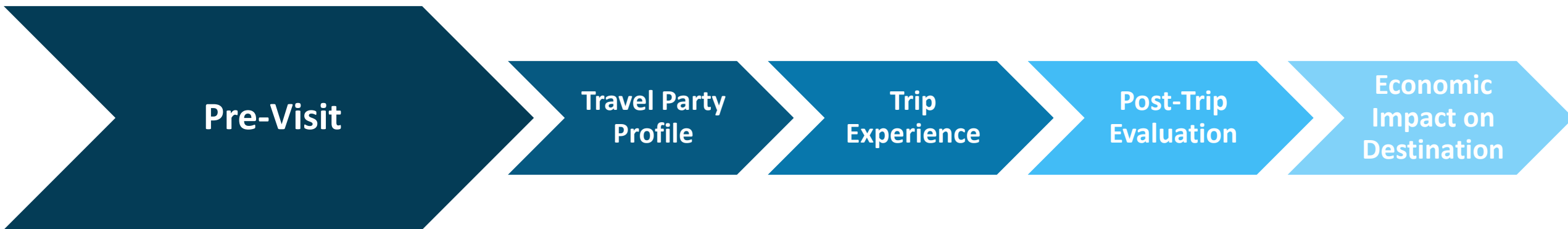
↓ 0.2%

**\$106.63**

RevPAR

↓ 10.4%

# VISITOR JOURNEY: PRE-VISIT



# PLANNING CYCLE

- » Over **4 in 10** visitors plan a Fall South Walton vacation at least 4 months in advance
- » **9%** of South Walton vacations are impulse decisions (plan two weeks or less in advance)
- » **15%** considered vacationing at a beach outside of South Walton - most of those beaches are in Florida



# TRIP PLANNING SOURCES\*

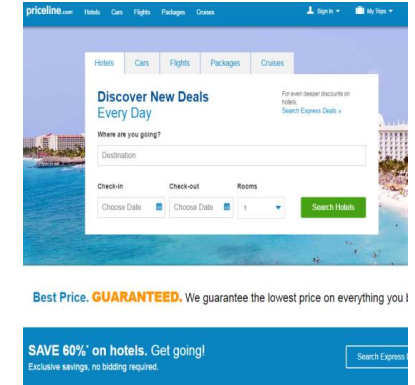


Friends, family

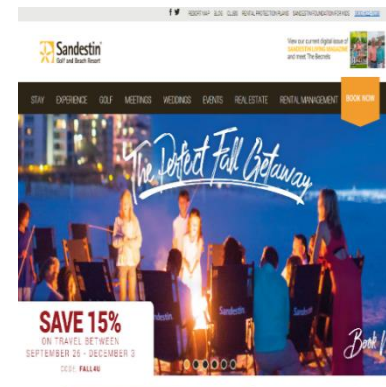
## Search engines



## Travel websites



## Website for 1 of the 16 beach neighborhoods



## Hotel Website



\*Multiple responses permitted.



# SOUTH WALTON VISITOR GUIDE

- » **17%** of visitors viewed (mostly online) the South Walton Visitors Guide before going to South Walton
- » Visitors Guide received a rating of **7.6 out of 10<sup>1</sup>**



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

# TOP REASONS FOR VISIT\*

Relax and unwind (**67%**)



Family vacation (**59%**)



Annual routine (**27%**)



Special occasion (**17%**)



\*Multiple responses permitted



# SOUTH WALTON PROMOTIONS

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

## Source of Noticed Promotion

Magazine Ad



Magazine article



Television



VisitSouthWalton.com



# 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

  
hotel • dining • spa

VRBO, Homeaway (**17%**)

 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:

**43%**

Northwest Florida Beaches  
International Airport



**43%**

Destin-Ft. Walton Beach  
Airport



**9%**

Pensacola International  
Airport

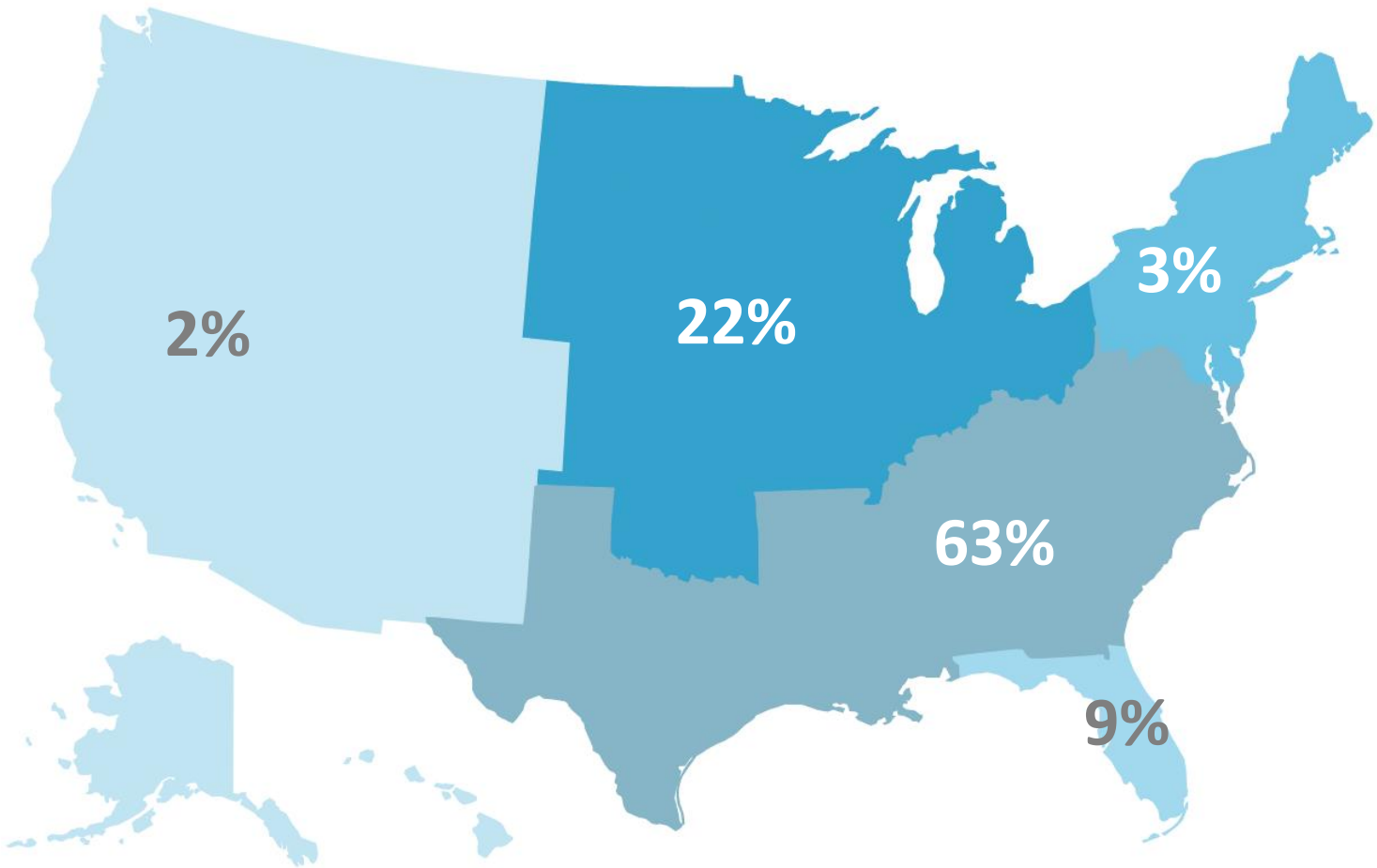


# VISITOR JOURNEY: TRAVEL PARTY PROFILE



# ORIGIN OF FALL VISITORS

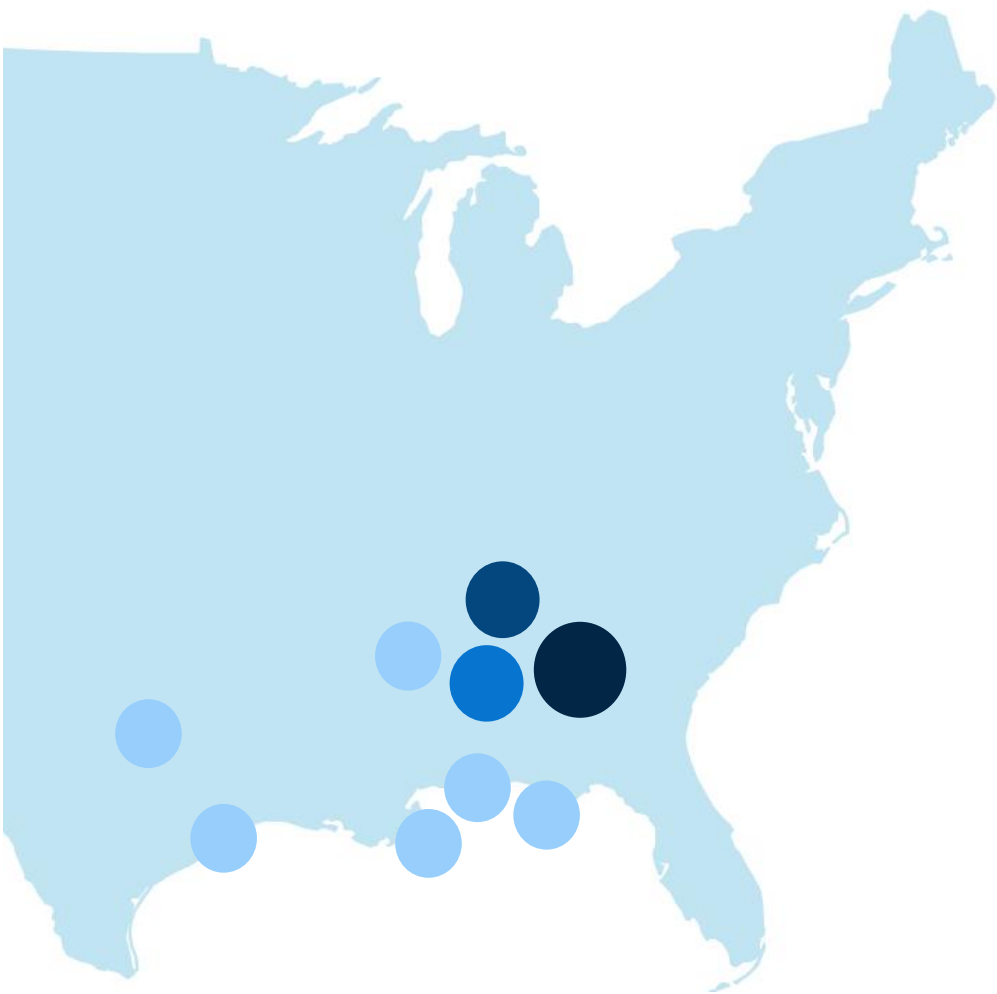
72% of visitors are from the southeast.



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

# ORIGIN OF FALL VISITORS

42% of visitors are from 9 markets.



- 12% ● Atlanta
- 7% ● Nashville
- 5% ● Birmingham
- 3% ● Dallas-Ft. Worth
- 3% ● Houston
- 3% ● Memphis
- 3% ● New Orleans
- 3% ● Panama City-Destin
- 3% ● Pensacola-Mobile



# 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:
  - » **54** years old
  - » Female (**57%**)
  - » Median household income of **\$166,700**
  - » From the Southeast (**72%**)

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



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

- Is **53** years old
- Has a median household income of **\$171,700**
- Is female (**57%**)
- 37%** travel with children
- 87%** drive to the area
- Is from:
  - Southeast (**73%**)
  - Midwest (**21%**)

<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 **65** years old
- Has a median household income of **\$158,200**
- Is male (**59%**)
- 25%** travel with children
- 88%** drive to the area
- Is from:
  - Southeast (**50%**)
  - Midwest (**42%**)

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

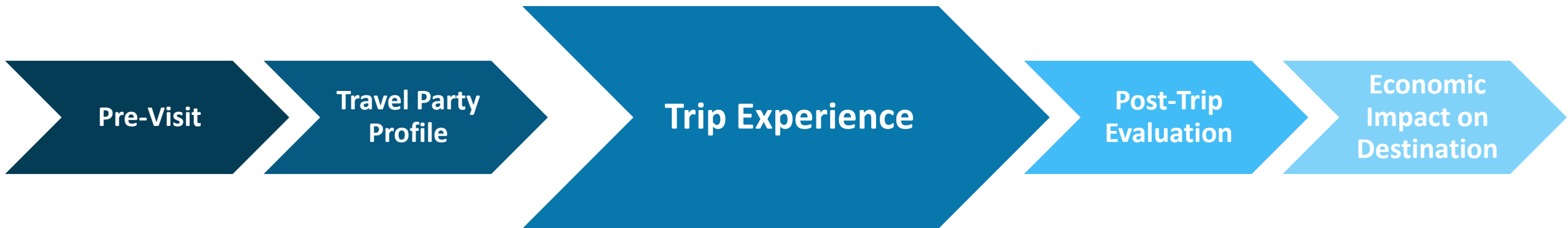
# VISITOR PROFILE: TYPICAL DAY TRIPPER

## » The typical Day Trip Visitor:

- » Is **56** years old
- » Has a median household income of **\$110,700**
- » Is female (**64%**)
- » **45%** travel with with children
- » **82%** drive to the area
- » Is from:
  - » Southeast – not including FL (**58%**)
  - » Midwest (**27%**)
  - » Florida (**13%**)



# VISITOR JOURNEY: TRIP EXPERIENCE





# ACCOMMODATIONS

**71%** Condos, rental houses, etc.



**14%** Hotels



**11%** Personal home/condo



# TOP VISITOR ACTIVITIES\*

Beach (94%)



Restaurants (93%)



Relax and unwind (88%)



Family time, reading,  
cooking (71%)



Shopping, antiques (68%)



\*Multiple responses permitted.



# LENGTH OF STAY

- » Visitors spent **6.0\*** nights in South Walton



\*Visitors who stayed 30 or fewer nights.

# FIRST-TIME AND EXPERIENCED VISITORS

- » **14%** were first-time visitors
- » **44%** had visited more than 10 times



# VISITOR EXPENDITURES\*

- » Visitors spent **\$647** a day
- » Visitors spent **\$3,882** on their trip



\*Visitors staying in paid accommodations.

# VISITOR JOURNEY: POST TRIP EVALUATION





# VISITOR SATISFACTION

- » Visitors gave South Walton a rating of **9.2<sup>1</sup>** as a place to vacation
- » **96%** will return to South Walton<sup>2</sup>

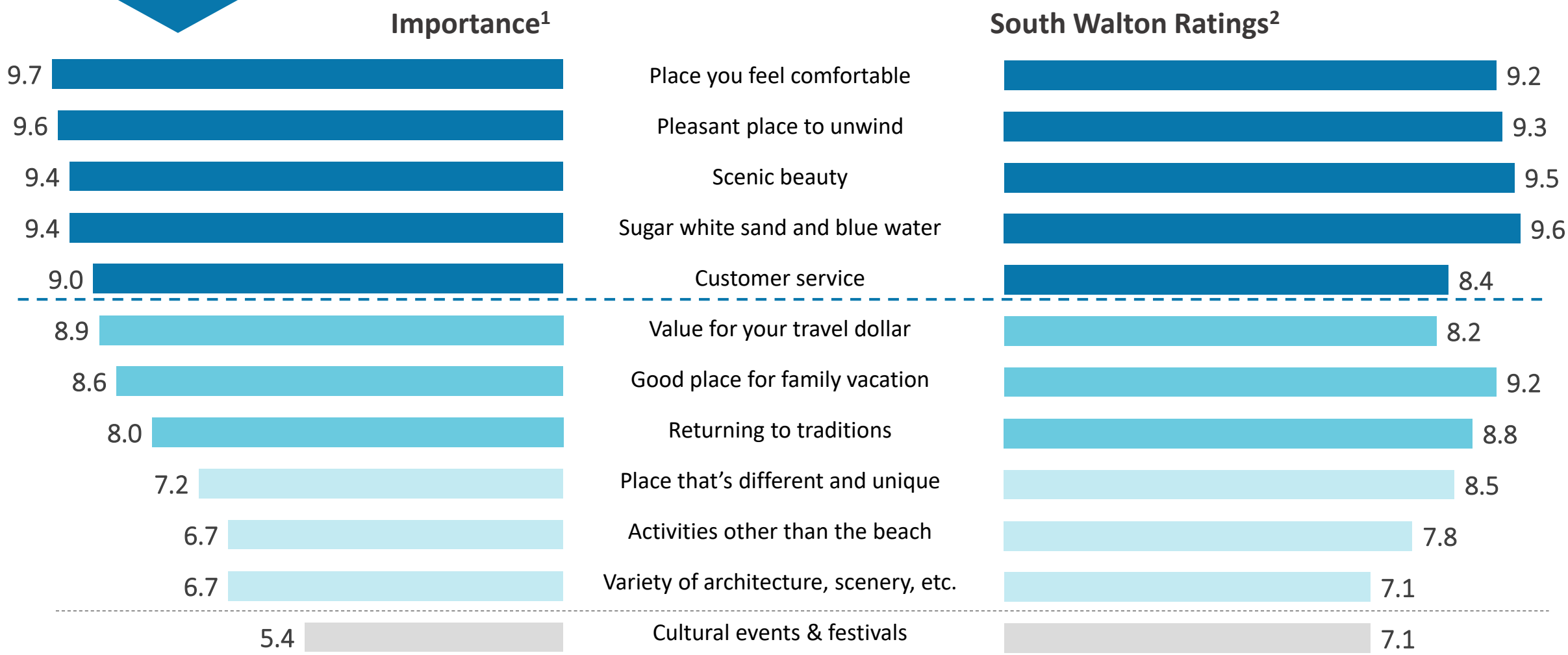


<sup>1</sup>10 = Excellent; 1 = Poor

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

1. Too expensive, 2. too crowded, 3. too many families

# 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

Beautiful white sand, clear water (55%)

“Where the purest sand and the most gentle surf meet an aqua sky surrounding by endless sun. A destination that will lull you into a stress-free daze and render you helpless in any attempt to return to anything that resembles the real world.”

Relaxing & stress free (38%)

“Serene, beautiful, fun, relaxing, peaceful, fulfilling, vibrant place with friendly locals & happy visitors all within a morning's drive.”

Good restaurants (14%)

“Most amazing place to vacation. Fabulous seafood, accommodations, and gorgeous beaches. Family oriented, quiet and peaceful.”

# EMOTIONS ASSOCIATED WITH SOUTH WALTON\*



\*Word cloud generated from verbatim responses

# YEARLY COMPARISONS



# VISITOR PROFILE – FALL 2018 VS. 2019

Visitor Metrics <sup>1</sup>	Fall 2018	Fall 2019
Travel party	4.7	4.3
Kids <20	41%	40%
Median age	54	54
Estimated median household income	\$165,900	\$166,700
Stayed in condo/rental house	75%	71%
Drove	85%	86%
Nights spent	6.4	6.0
Direct expenditures (travel party for entire trip)	\$4,313	\$3,882
1 <sup>st</sup> time visitor	13%	14%
10+ visits to South Walton	45%	44%

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

# VISITOR PROFILE – FALL 2018 VS. 2019

Top Origin States	Fall 2018	Fall 2019
Georgia	14%	15%
Tennessee	13%	14%
Alabama	14%	13%
Florida	11%	9%
Texas	6%	8%
Kentucky	5%	6%
Origins - Regions	Fall 2018	Fall 2019
Southeast	75%	72%
Northeast	3%	3%
Midwest	18%	22%
West	3%	2%
International	1%	1%

# VISITOR PROFILE – FALL 2018 VS. 2019

Top Visitor Activities	Fall 2018	Fall 2019
Beach	93%	94%
Restaurant	93%	93%
Relax & unwind	89%	88%
Family time, read, cook	72%	71%
Shop, antique	64%	68%
Bike, run, etc.	35%	34%
Bars, nightclubs	25%	29%
Attractions	18%	24%
Water sports	20%	23%
State parks	20%	19%
Hiking, nature walks	16%	17%
Special events	16%	16%
Golf & tennis	12%	13%
Art galleries, museums, culture	8%	9%
Dune Lakes	8%	9%

# VISITOR PROFILE – FALL 2018 VS. 2019

Visitor Metrics	Fall 2018	Fall 2019
Will return to South Walton	96%	96%
Rating for overall experience <sup>1</sup>	9.1 <sup>1</sup>	9.2 <sup>1</sup>
Viewed Visitors Guide	21%	17% <sup>2</sup>
Planned trip	4+ months out	4+ months out
Used VisitSouthWalton.com	23%	19%
Used 1 of 16 beaches' websites	29%	25%

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

<sup>2</sup> 14% used the online version & 3% used the print version.

# VISIT SOUTH WALTON

## Visitor Tracking Study

Fall 2019  
(September, October, November)



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