

# VISIT SOUTH WALTON

## Visitor Tracking Study

Fall 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

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<sup>1</sup> with 741 Fall visitors who traveled to South Walton between September and November 2020.

<sup>1</sup>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. 177 interviews were conducted via face-to-face interviews along the beach and in public areas.

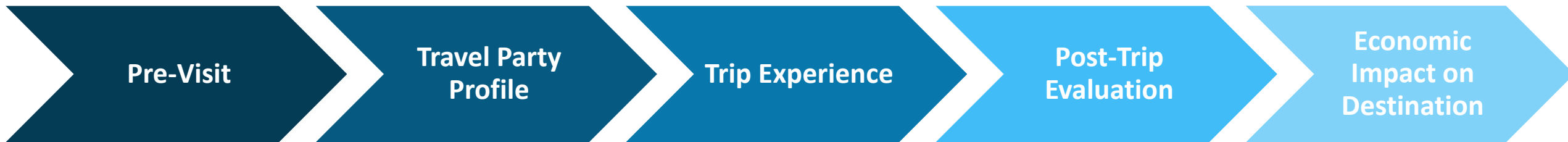


# EXECUTIVE SUMMARY



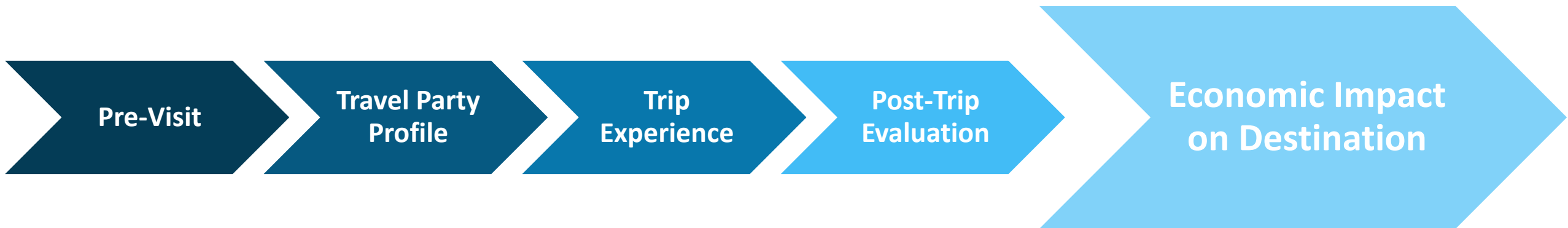
# VISITOR JOURNEY: ECONOMIC IMPACT

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%.<sup>1</sup>

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 <sup>1</sup>	+104.1% <sup>1</sup>
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.

<sup>1</sup> 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

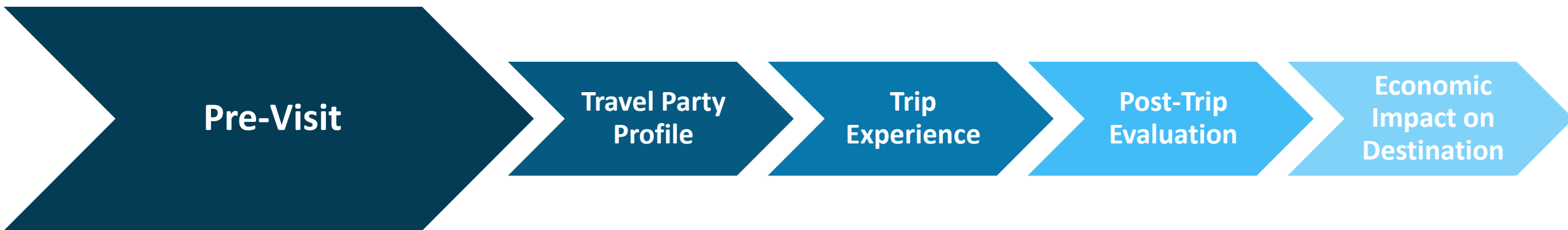
↑ 7.3%

**\$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\*

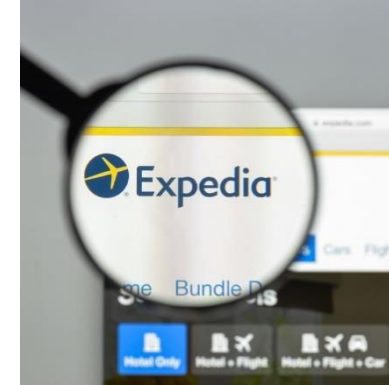


Friends, family **46%**

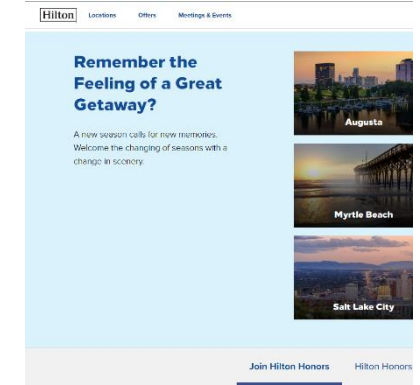
Search sites **34%**



Travel websites **29%**



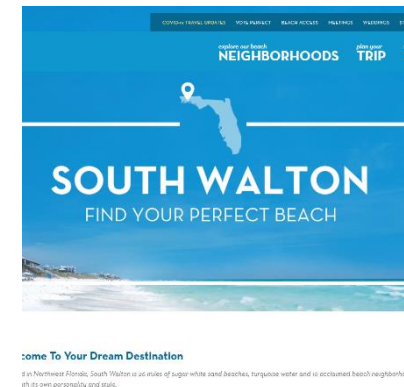
Hotel Website **25%**



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



<sup>1</sup>10 = 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



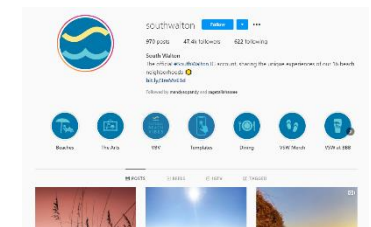
### Other social media



### 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

  
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%**

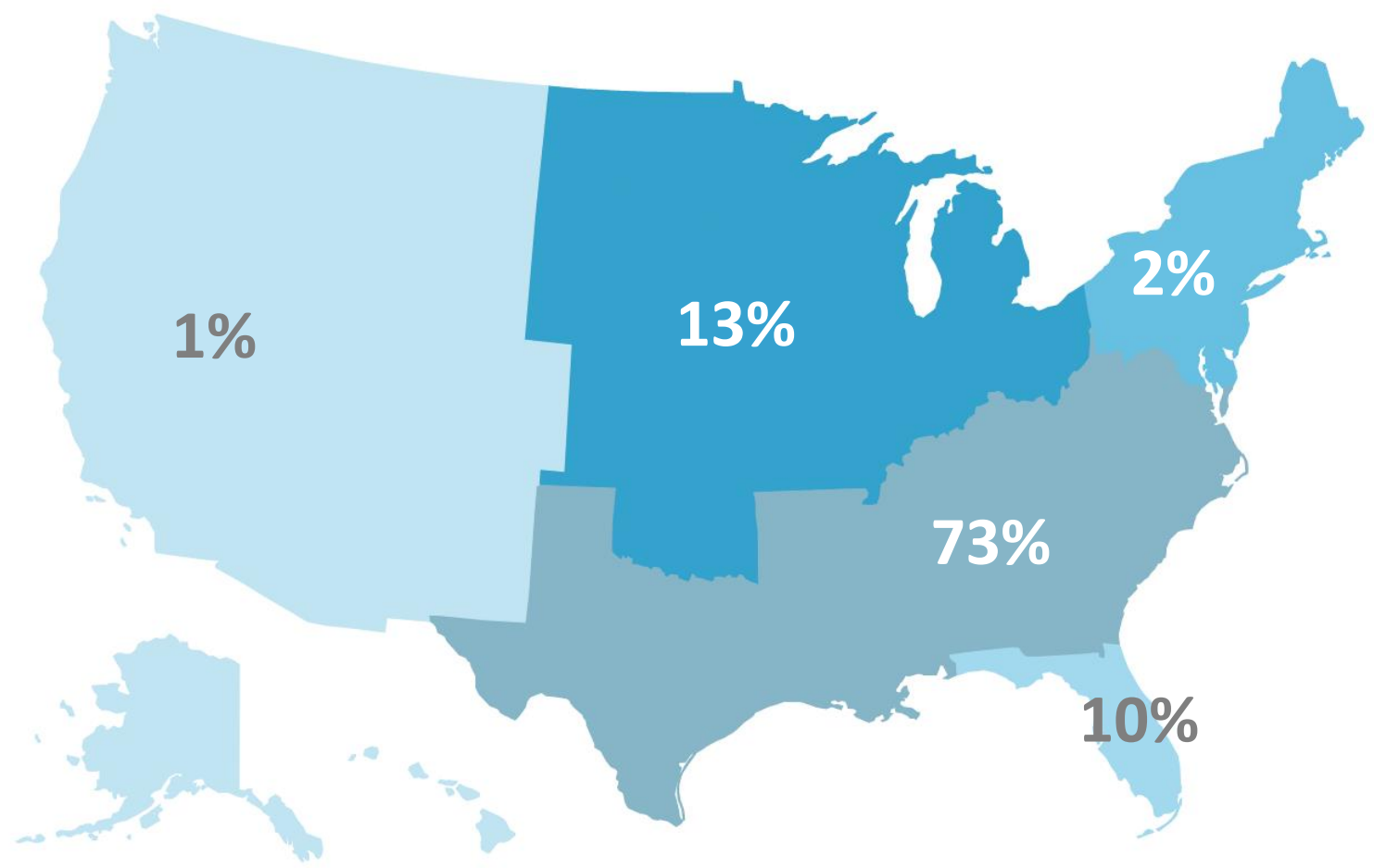
Pensacola International  
Airport



# VISITOR JOURNEY: TRAVEL PARTY PROFILE

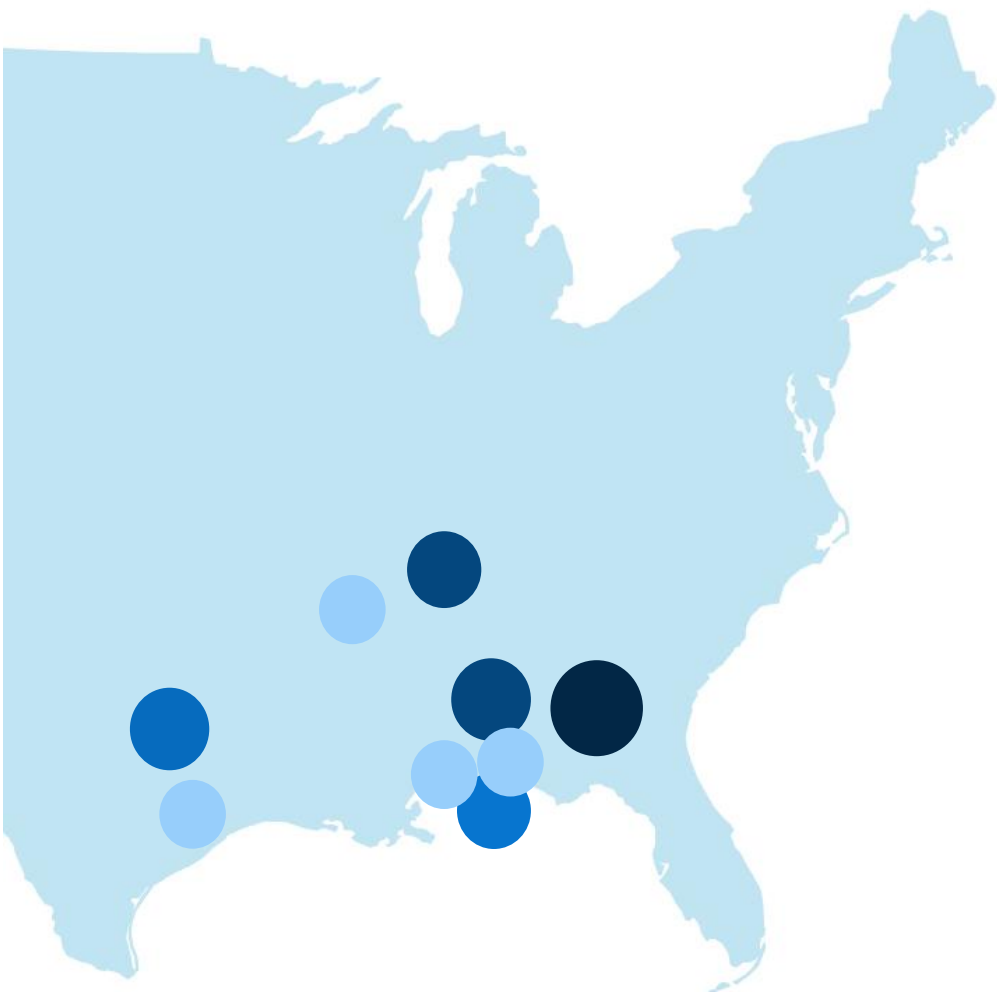


# ORIGIN OF FALL VISITORS



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 VACATIONER<sup>1</sup>



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

- Is **55** years old
- Has a median household income of **\$168,800**
- Is female<sup>2</sup> (**62%**)
- 44%** travel with children
- 88%** drive to the area
- Is from:
  - Southeast (**89%**)

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

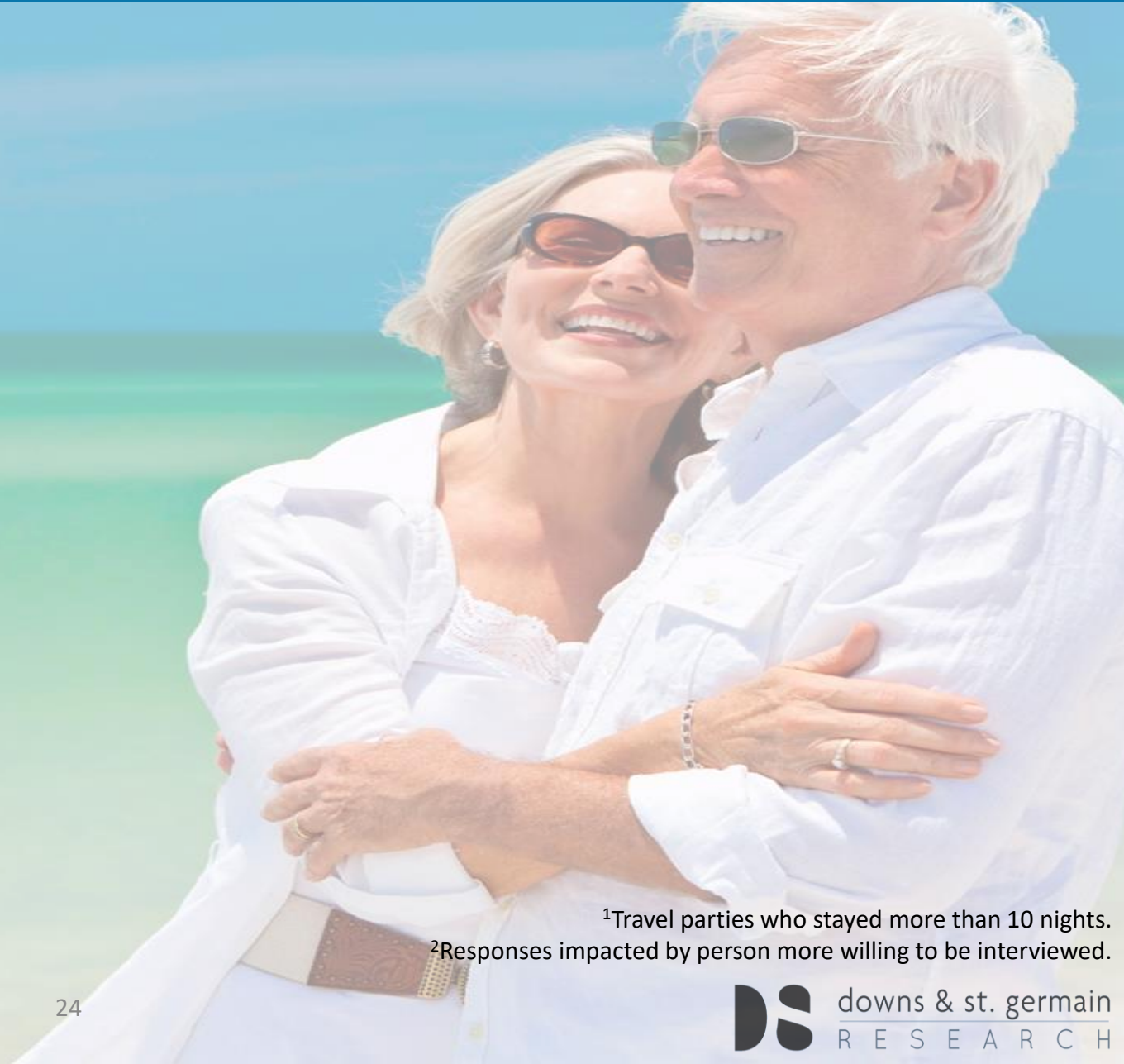
<sup>2</sup>Responses impacted by person more willing to be interviewed.



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

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

- Is **57** years old
- Has a median household income of **\$244,400**
- Is female<sup>2</sup> (**75%**)
- 20%** travel with children
- 88%** drive to the area
- Is from:
  - Southeast (**90%**)



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

<sup>2</sup>Responses impacted by person more willing to be interviewed.

# VISITOR PROFILE: TYPICAL DAY TRIPPER

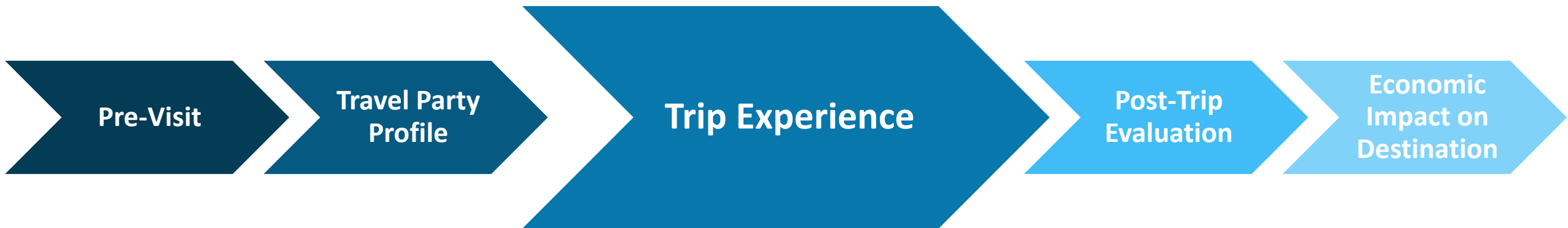
## » The typical Day Trip Visitor:

- » Is **57** years old
- » Has a median household income of **\$131,300**
- » Is female<sup>1</sup> (**54%**)
- » **23%** travel with with children
- » **84%** drive to the area
- » Is from:
  - » Southeast – not including FL (**66%**)
  - » Florida (**29%**)



<sup>1</sup>Responses 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 **8.9<sup>1</sup>** as a place to vacation
- » **95%** will return to South Walton<sup>2</sup>

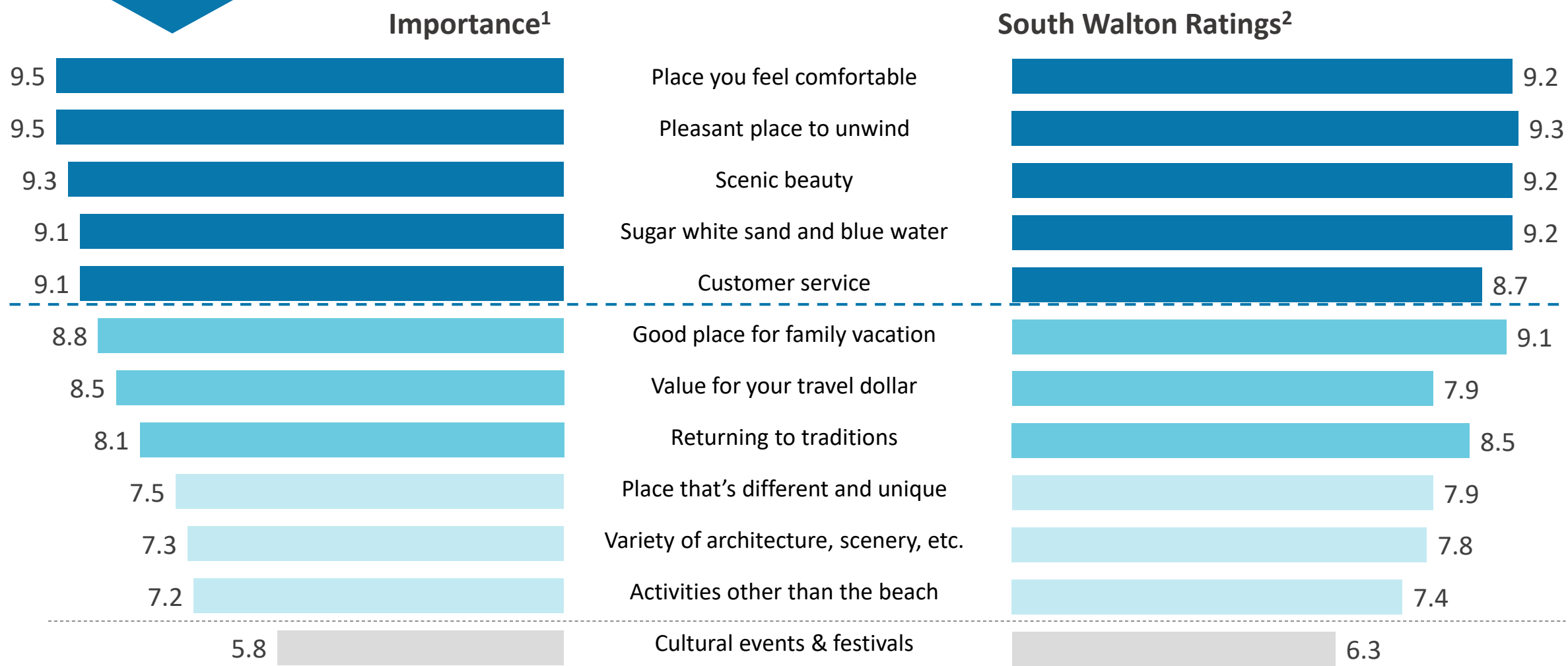


<sup>1</sup>10 = Excellent; 1 = Poor

<sup>2</sup>4% 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

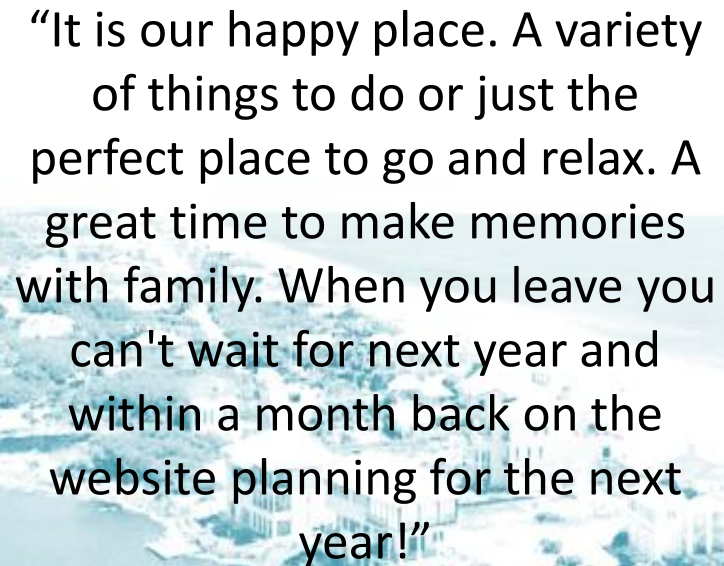


<sup>1</sup>Rated on a scale from 1 to 10 where 10 is very important and 1 is not at all important.

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

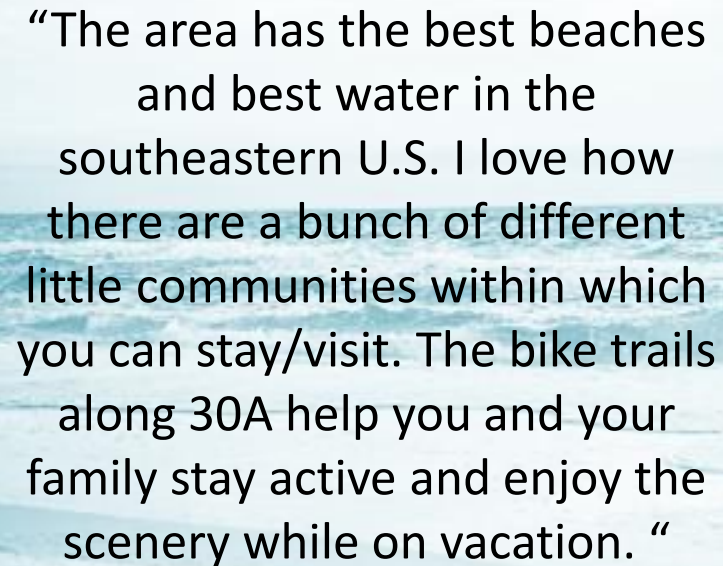
# VISITOR DESCRIPTIONS OF SOUTH WALTON

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



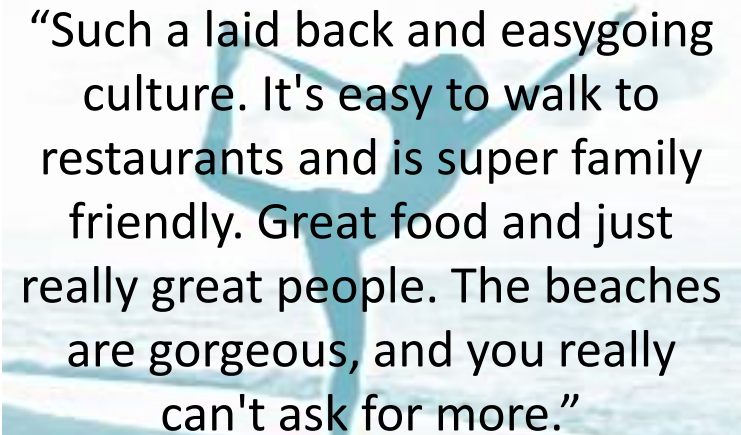
“It is our happy place. A variety of things to do or just the perfect place to go and relax. A great time to make memories with family. When you leave you can't wait for next year and within a month back on the website planning for the next year!”

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 <sup>st</sup> 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 <sup>1</sup>	9.2 <sup>1</sup>	8.9 <sup>1</sup>
Viewed Visitors Guide	17%	26% <sup>2</sup>
Planned trip	4+ months out	4+ months out
Used VisitSouthWalton.com	19%	21%
Used 1 of 16 beaches' websites	25%	24%

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

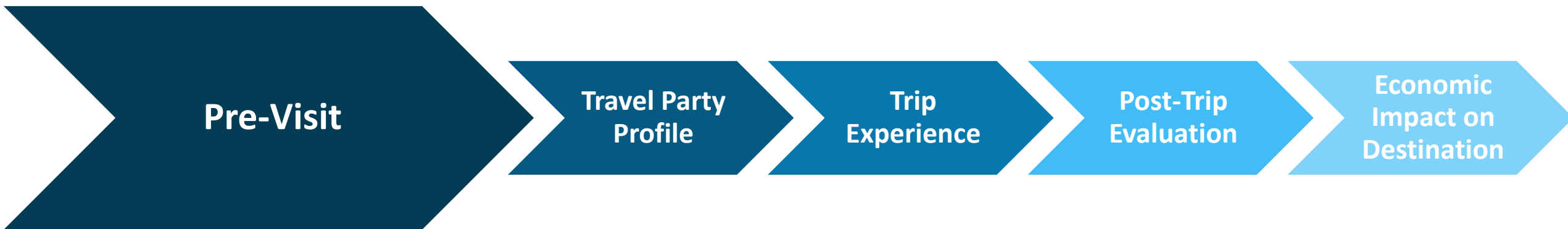
<sup>2</sup> 20% used the online version & 6% used the print version.

# DETAILED FINDINGS





# VISITOR JOURNEY: PRE-VISIT



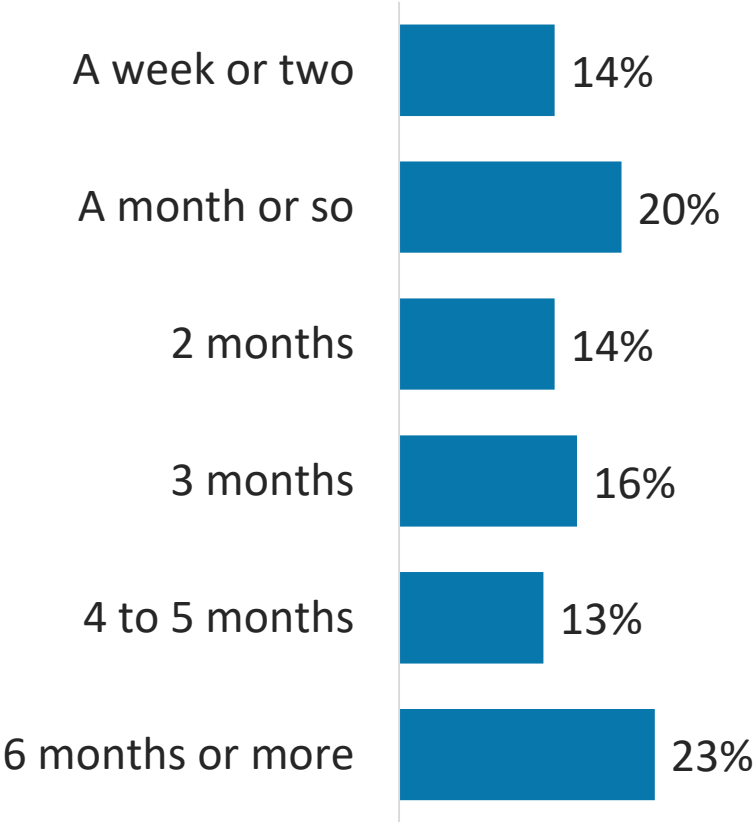
# PLANNING CYCLE




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



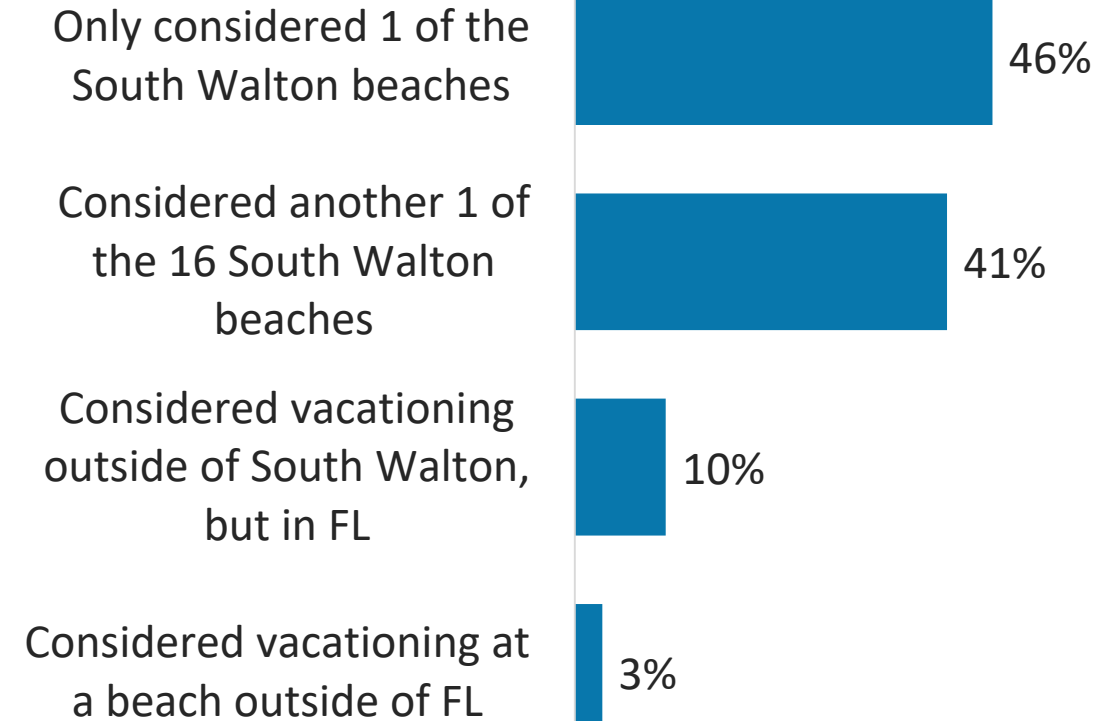
**1 in 3** visitors to South Walton have a short (a month or less) planning cycle.



# OTHER DESTINATIONS CONSIDERED



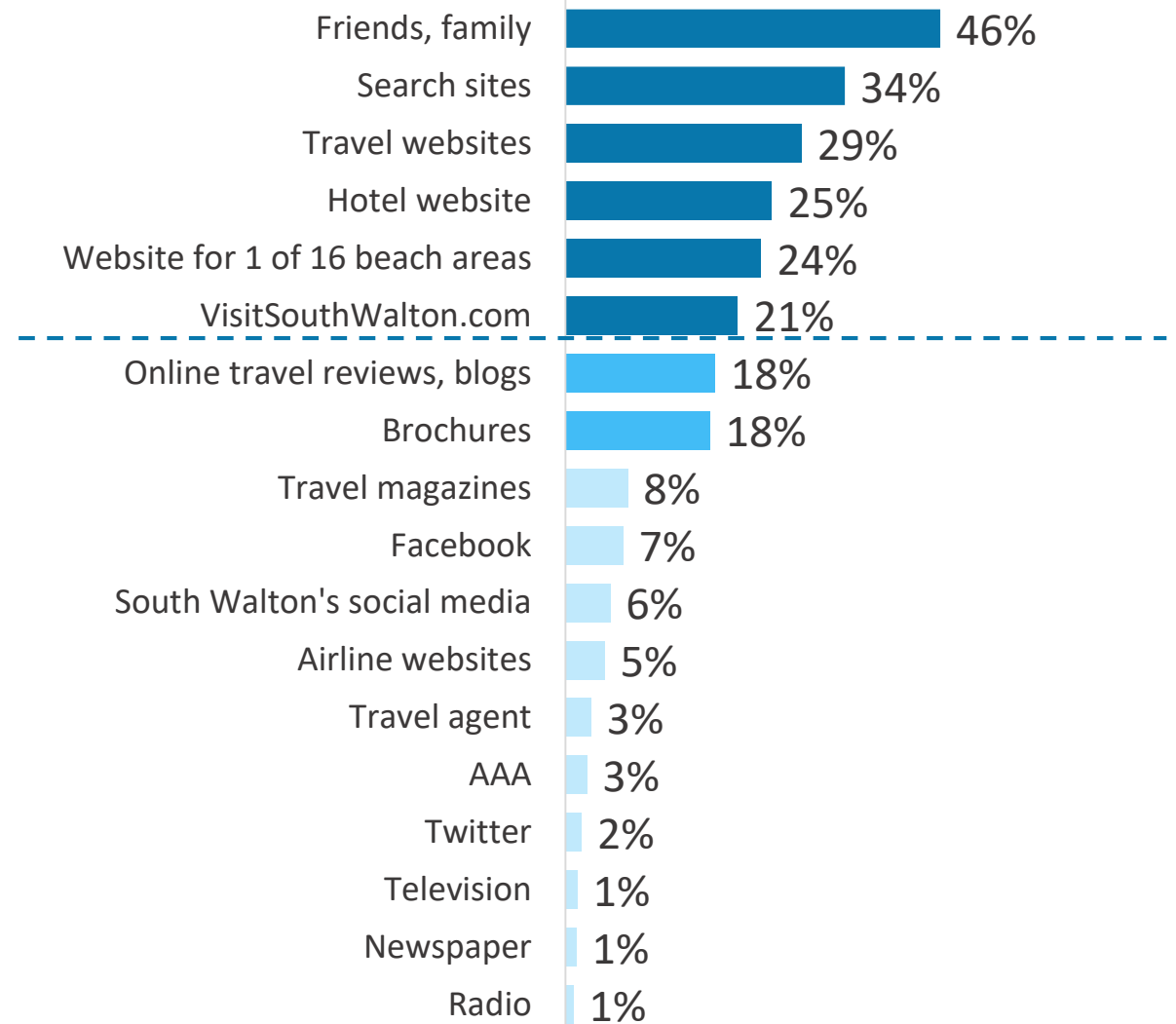
Only **13%** of visitors considered vacationing at a beach outside of South Walton.



# PLANNING SOURCES<sup>1</sup>

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.

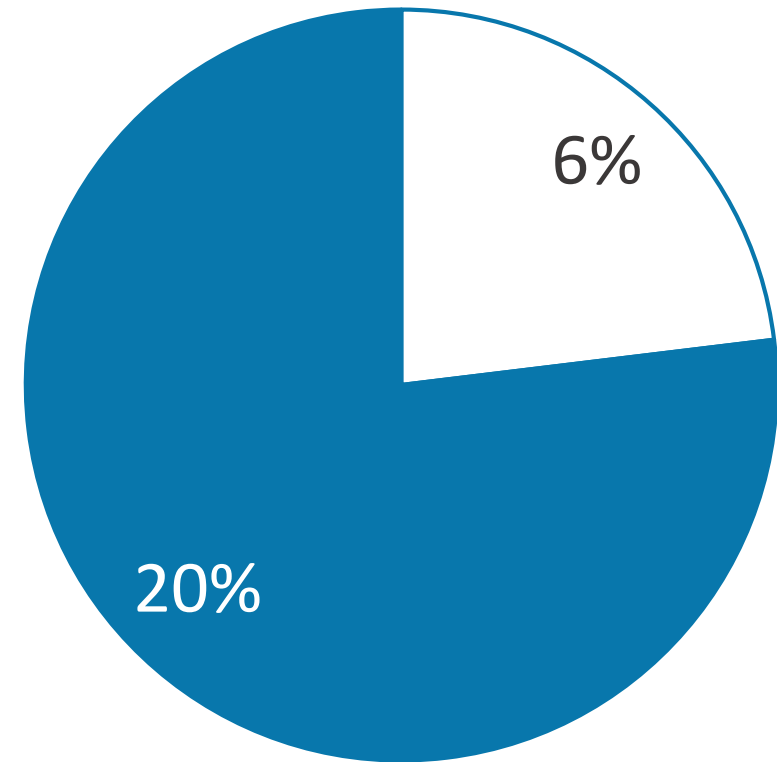


<sup>1</sup>Multiple responses permitted.

# SOUTH WALTON VISITOR GUIDE



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

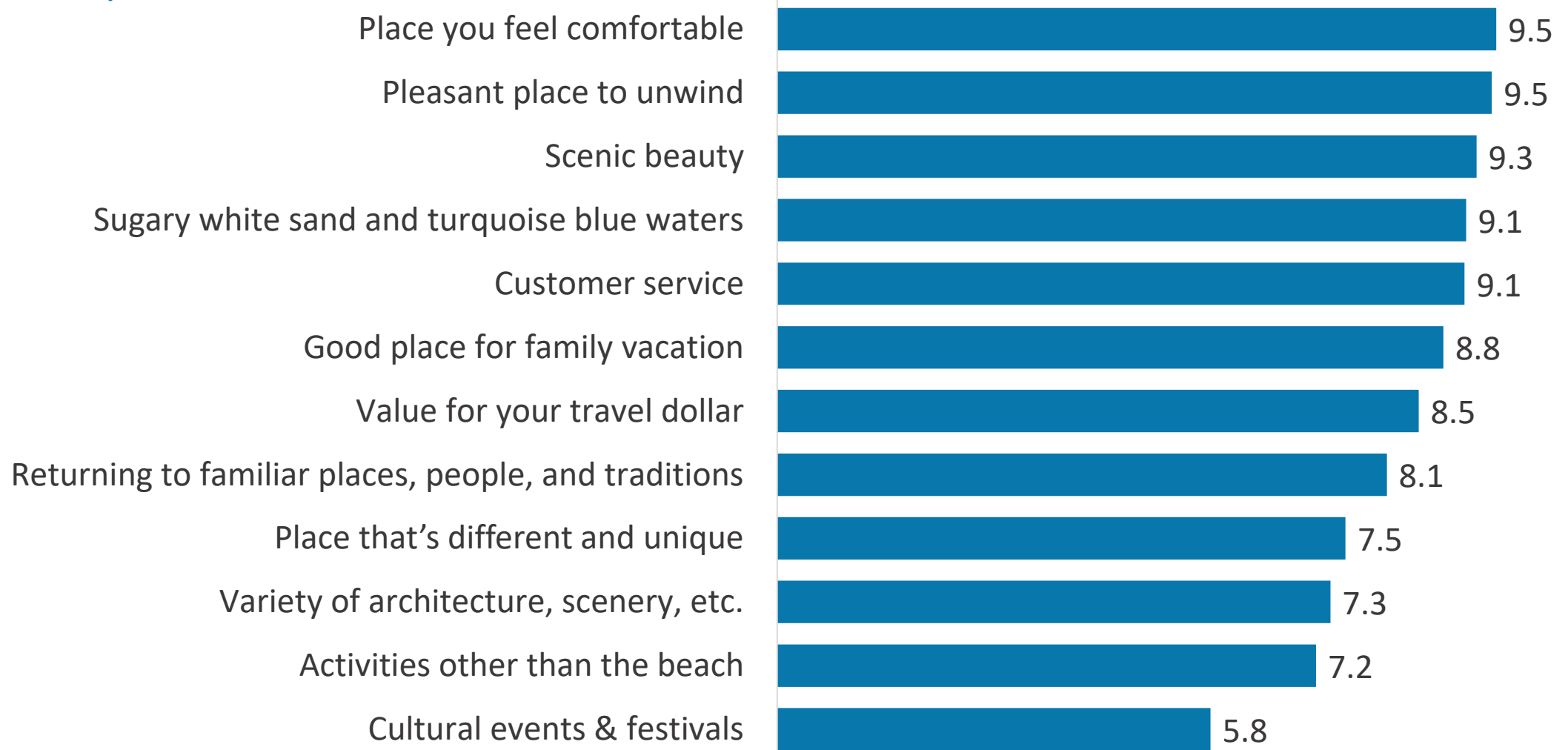


□ Print version    ■ Online version

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

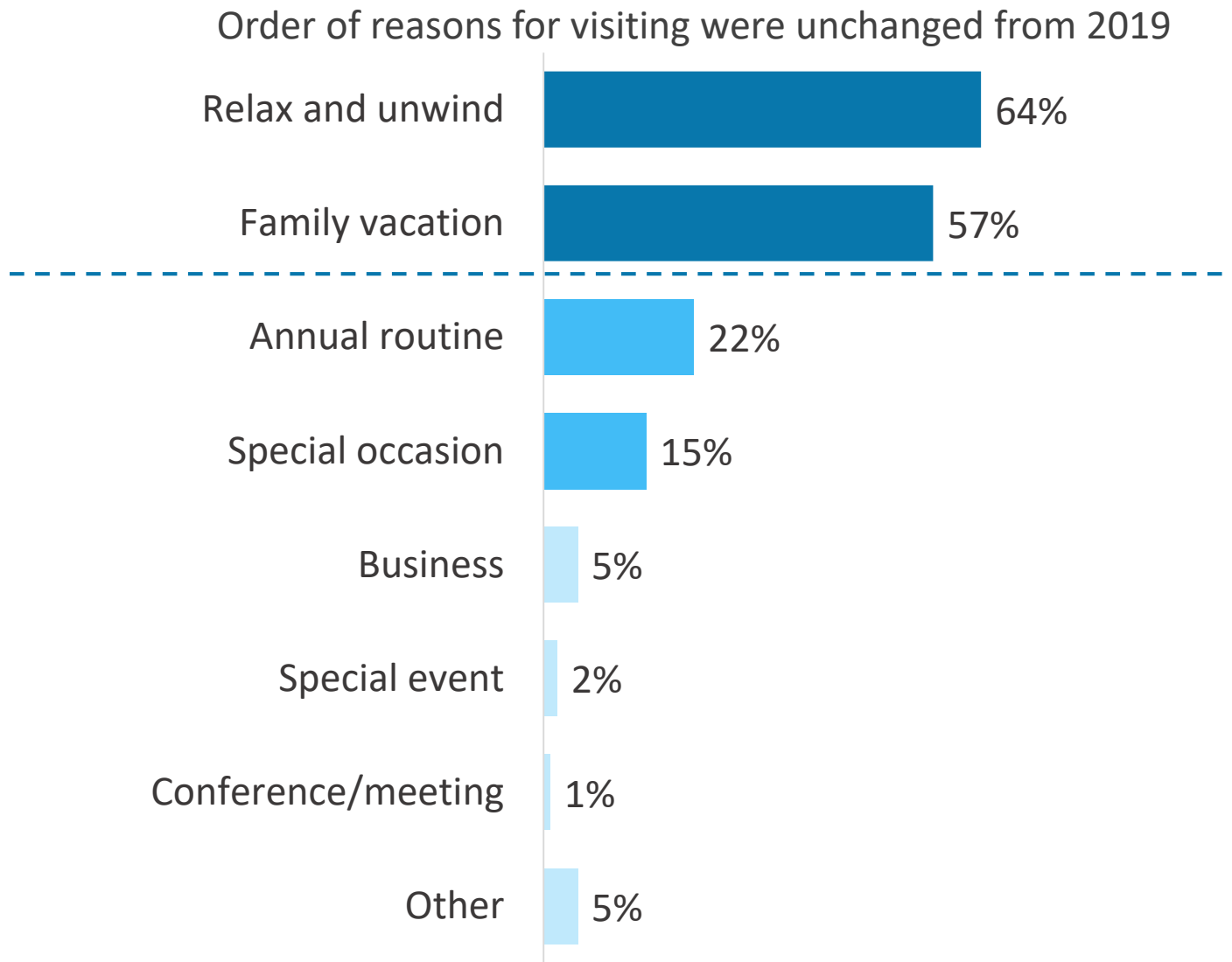


# IMPORTANT VACATION DESTINATION ATTRIBUTES<sup>1</sup>



<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>

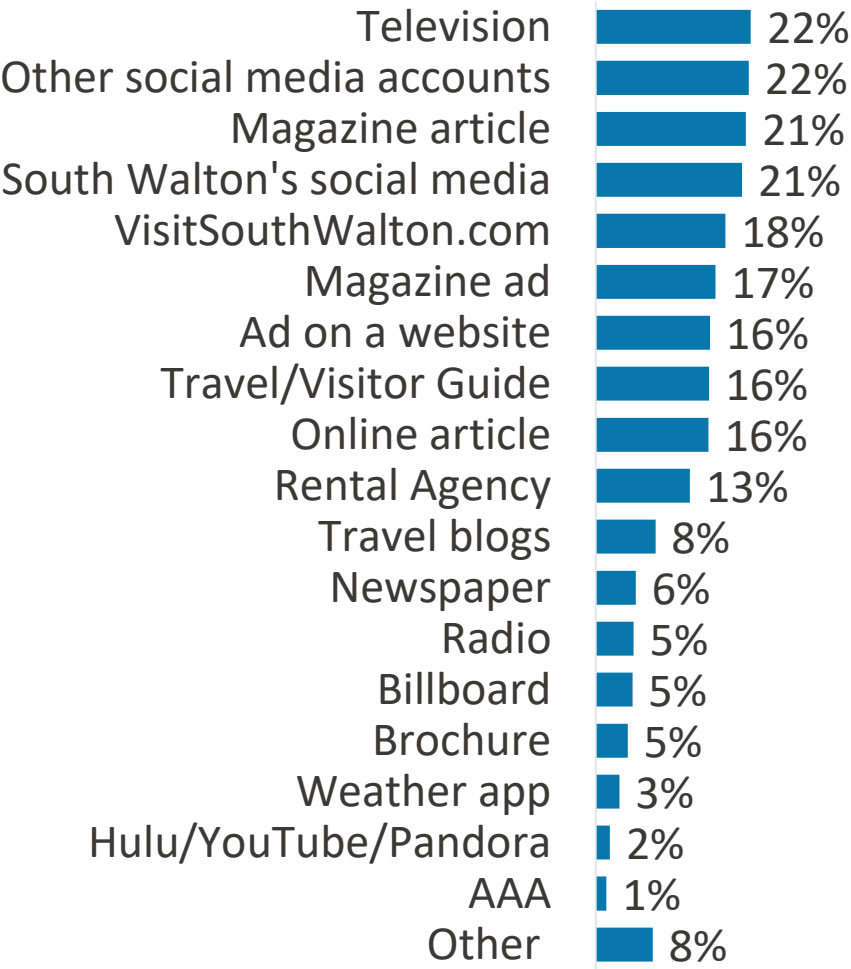


<sup>1</sup>Multiple responses permitted.

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

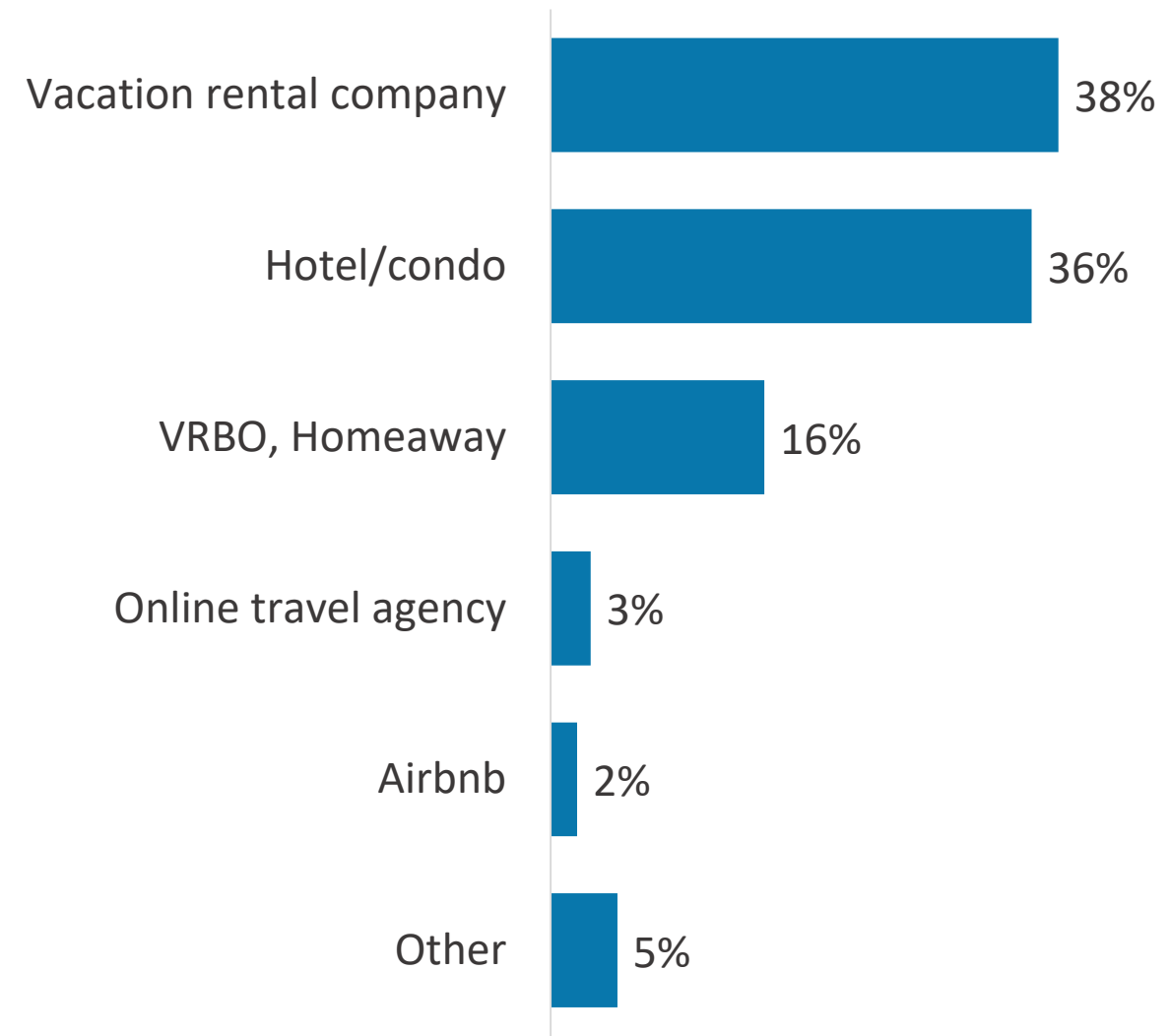


**27%** of Fall visitors have recently seen, read or heard advertising, promotions or travel stories about South Walton.



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

# BOOKING ACCOMMODATIONS






# VISITOR TRANSPORTATION

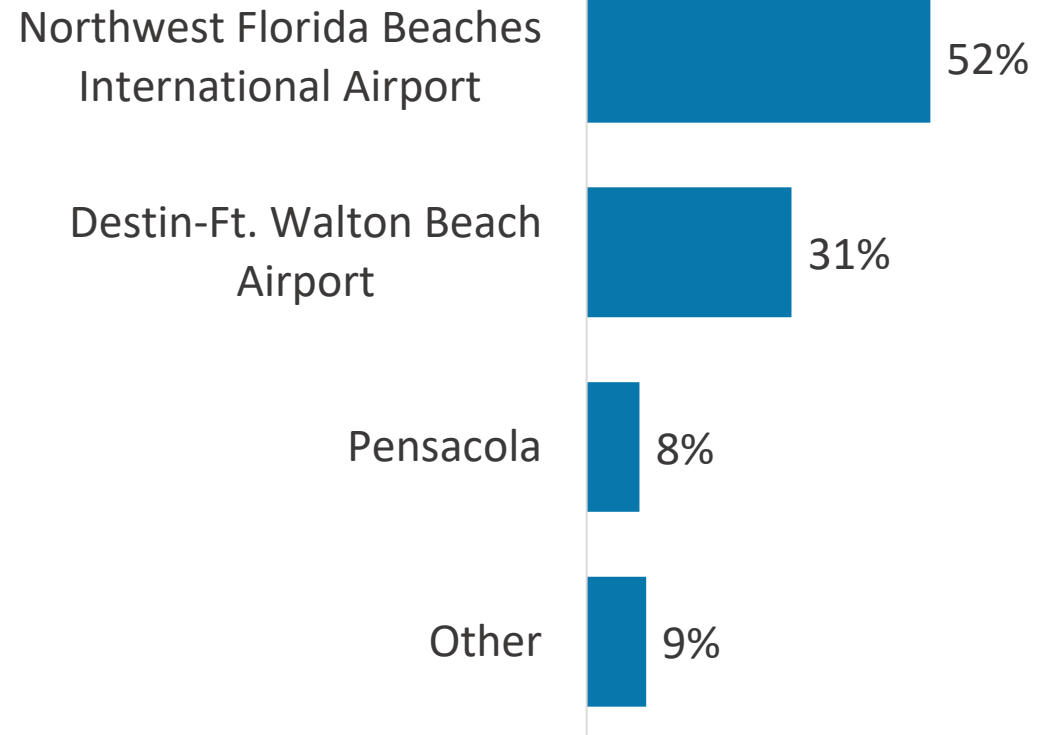


**87%** of Fall visitors drove to South Walton.



**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:

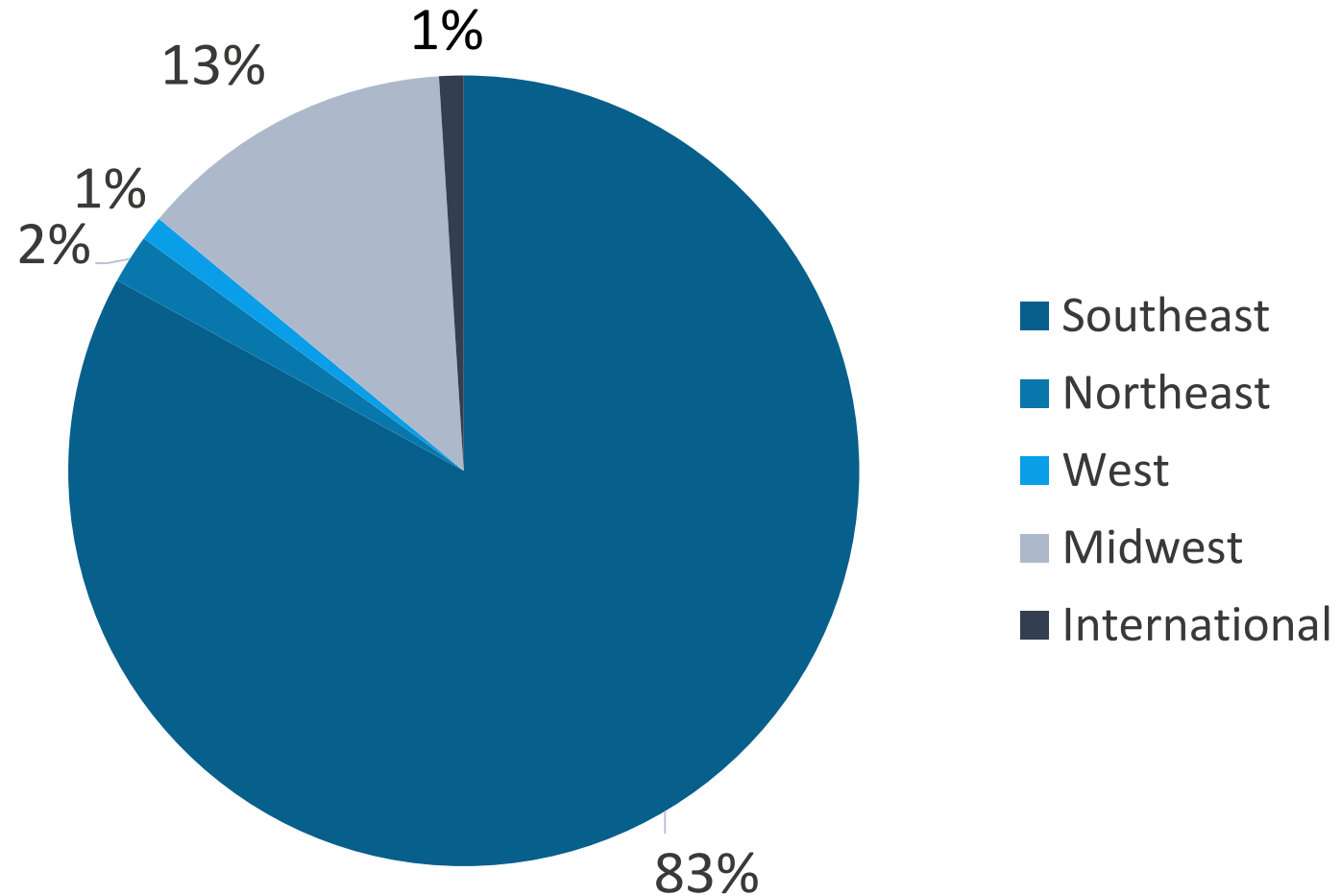


# VISITOR JOURNEY: TRAVEL PARTY PROFILE



# 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%



<sup>1</sup>The 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%

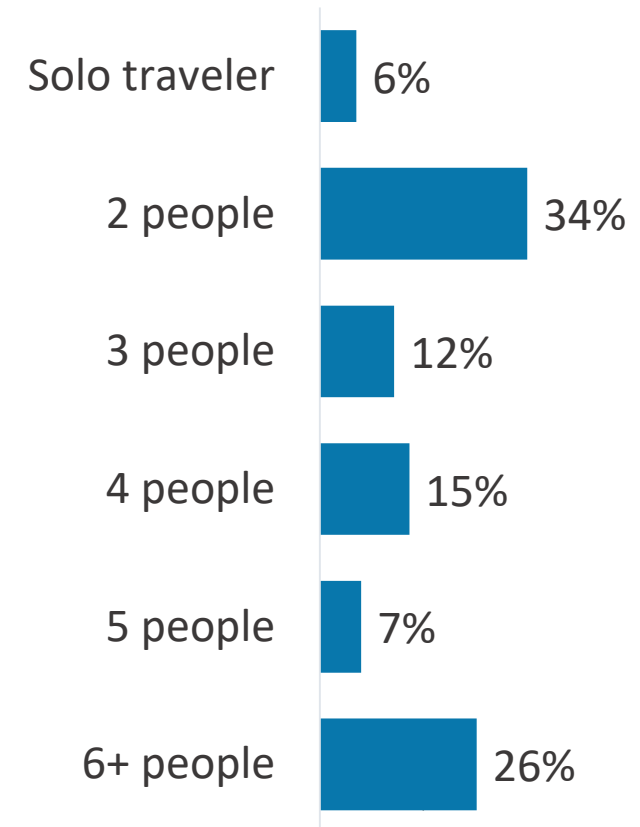




# TRAVEL PARTY SIZE AND COMPOSITION

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

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

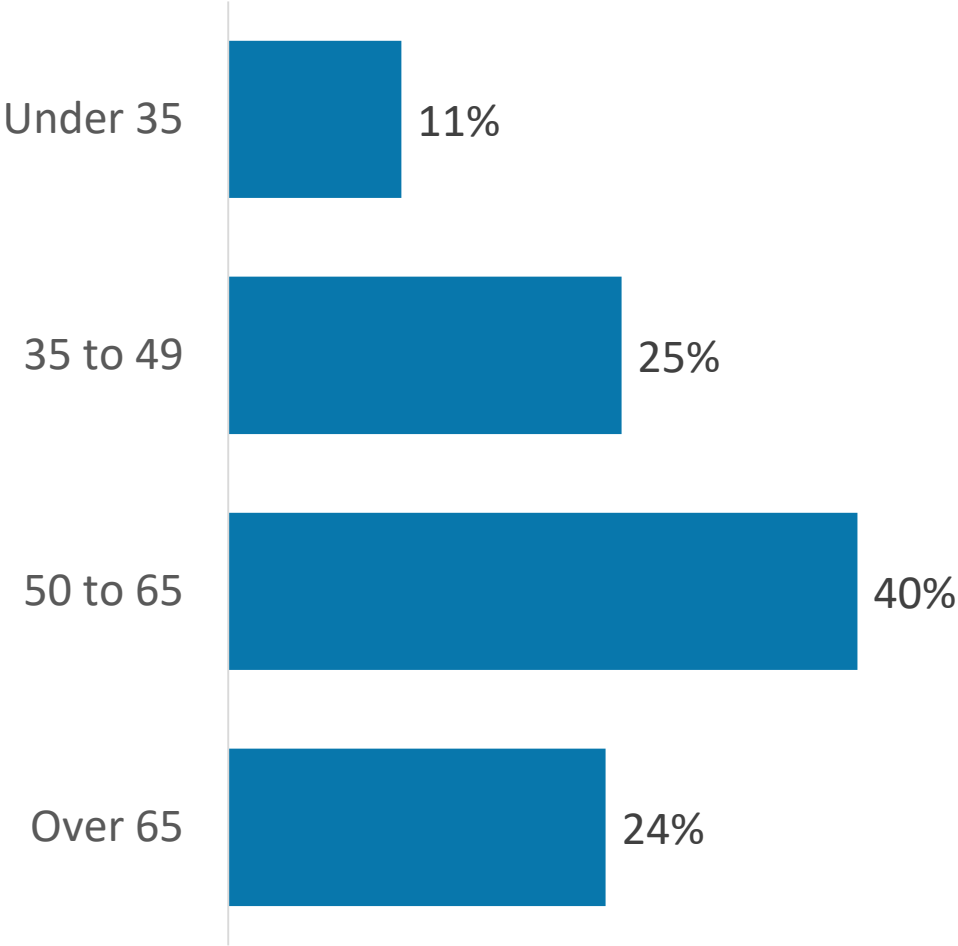


<sup>1</sup>Multiple responses permitted.

# AGE OF FALL VISITORS

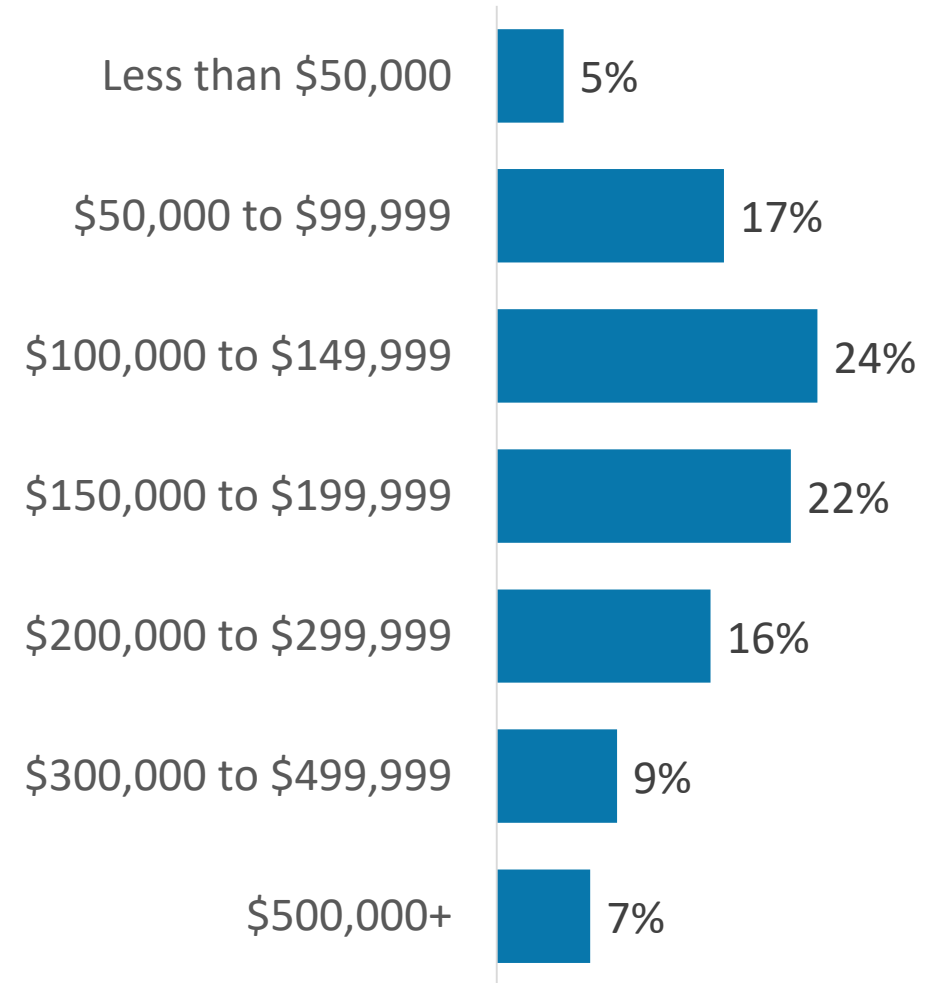


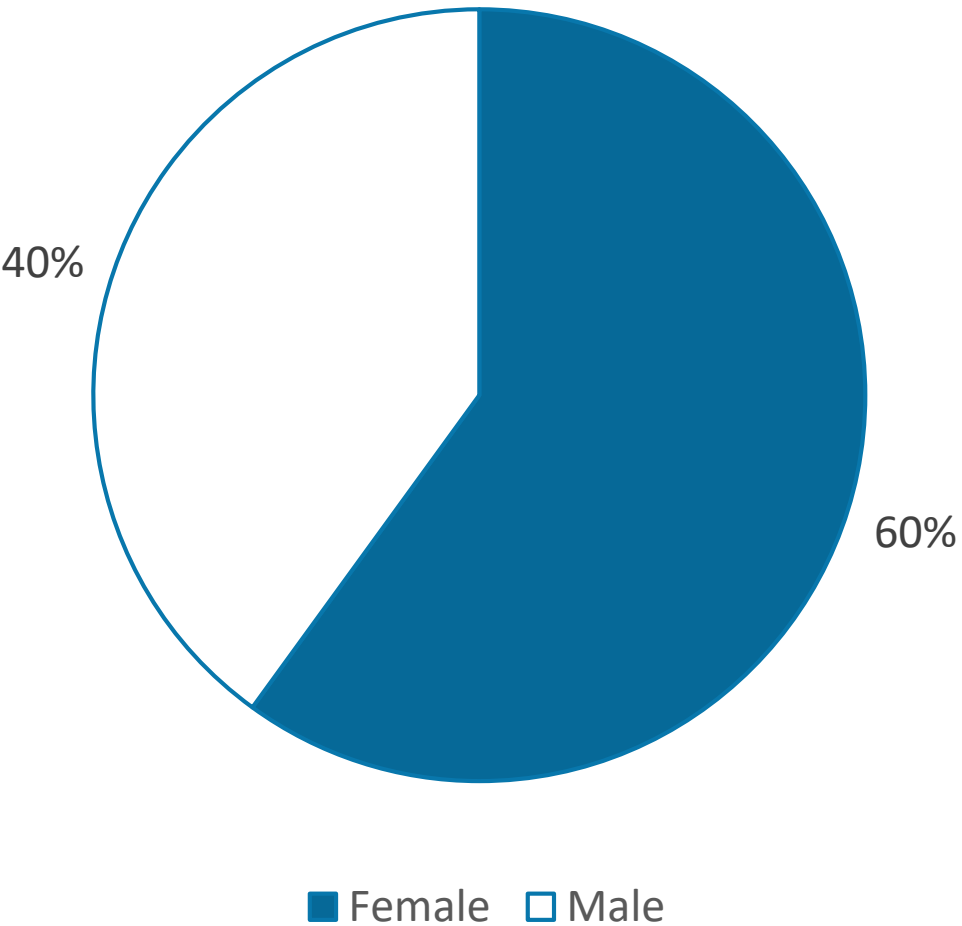
Median age of Fall visitors was **55 years old**.



# TOTAL HOUSEHOLD INCOME IN 2019

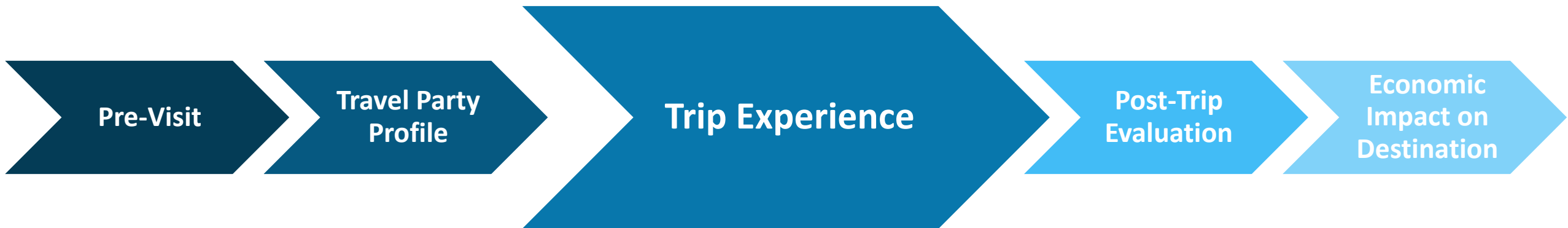
Fall visitors had a **median** household income of **\$159,100**





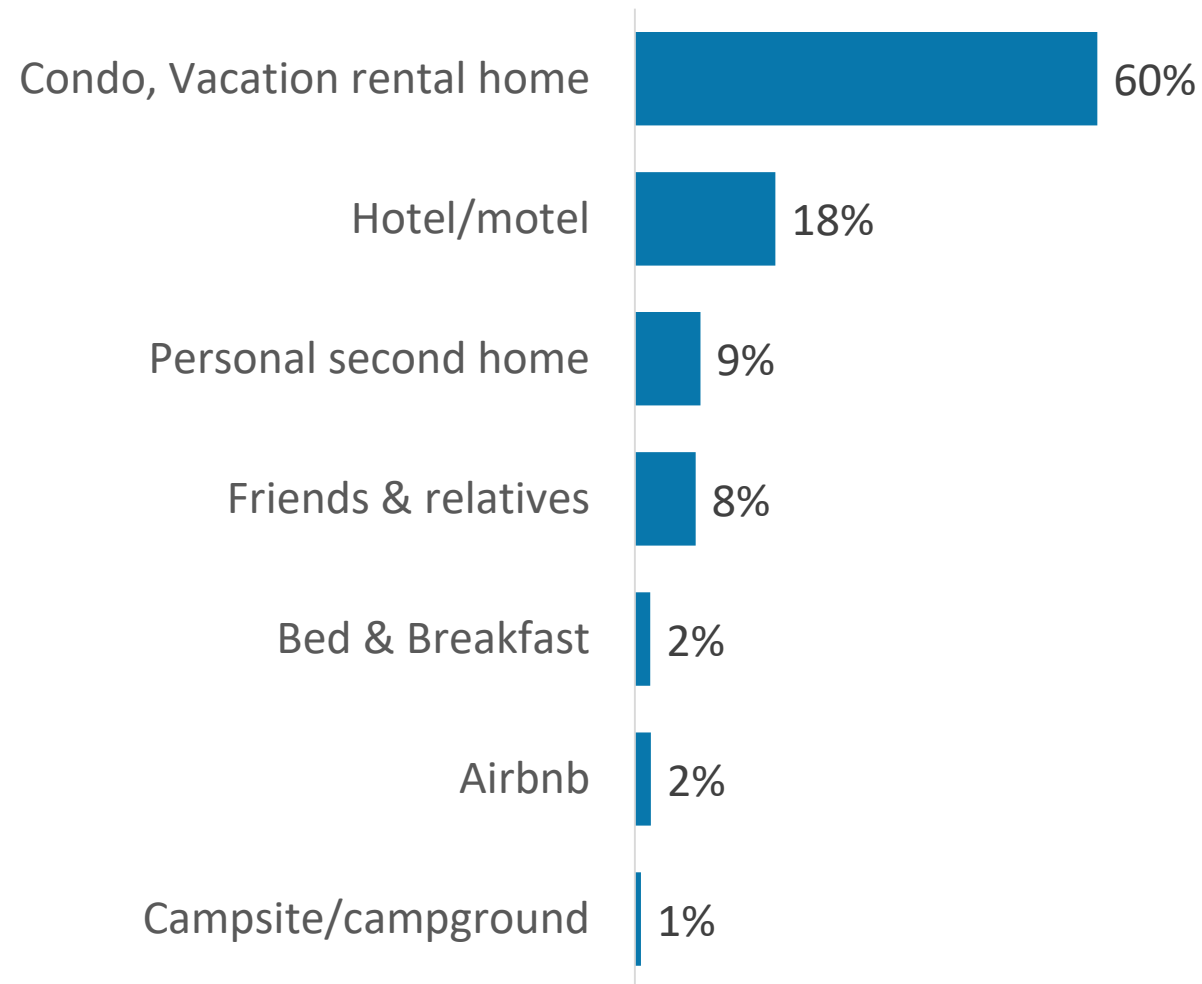
Responses impacted by person more willing to be interviewed

# VISITOR JOURNEY: TRIP EXPERIENCE



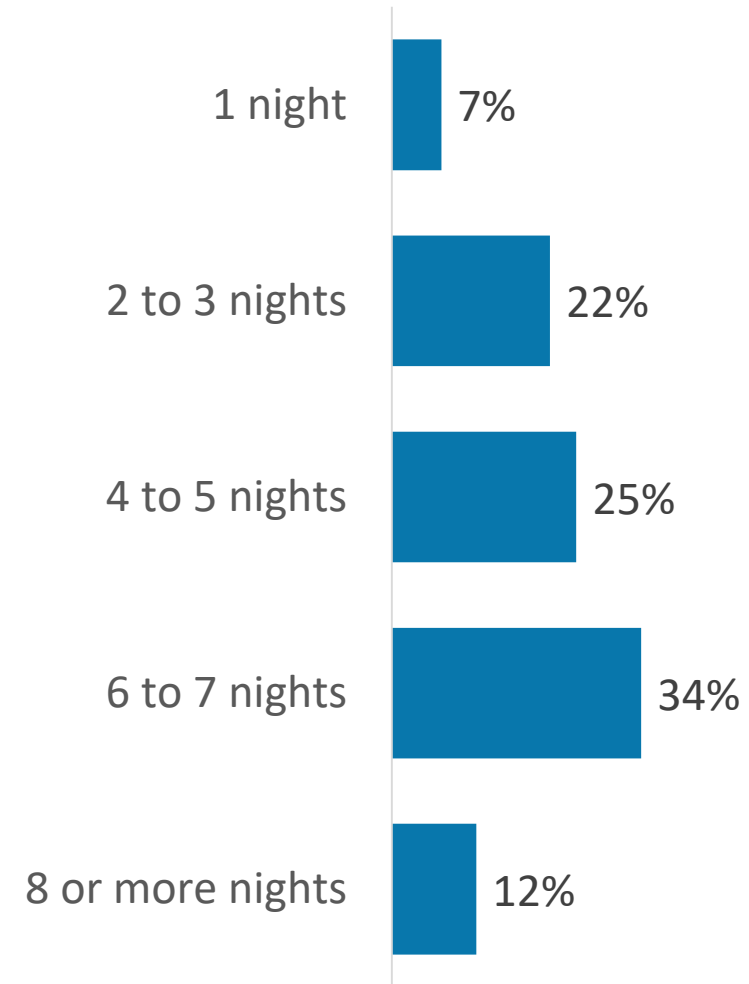


# VISITOR PAID ACCOMMODATIONS



# LENGTH OF STAY

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



<sup>1</sup>Visitors 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



10%

2 – 3



12%

4 – 5



11%

6 – 10



18%

11 – 20



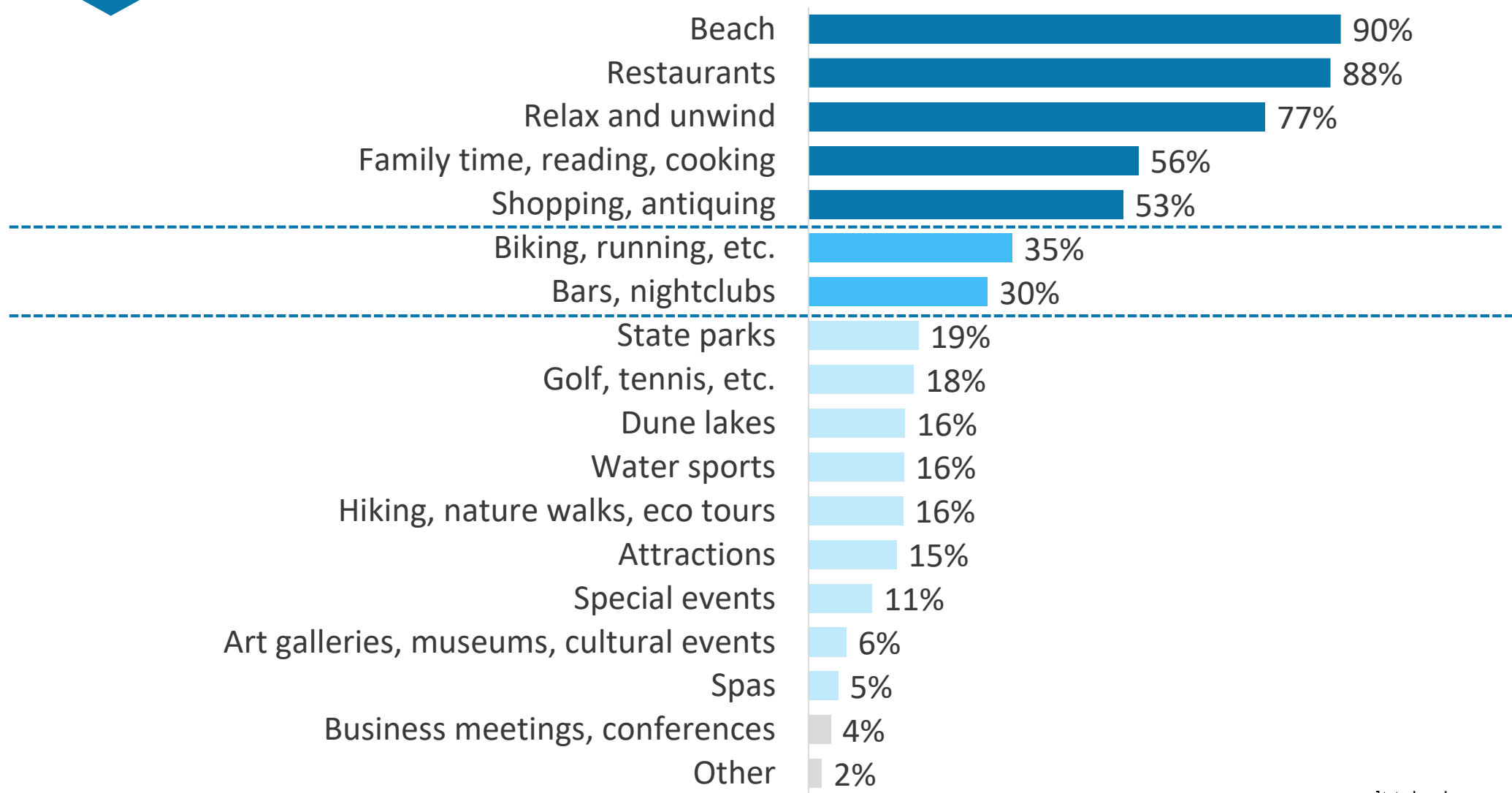
22%

21+



27%

# 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	\$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

<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.



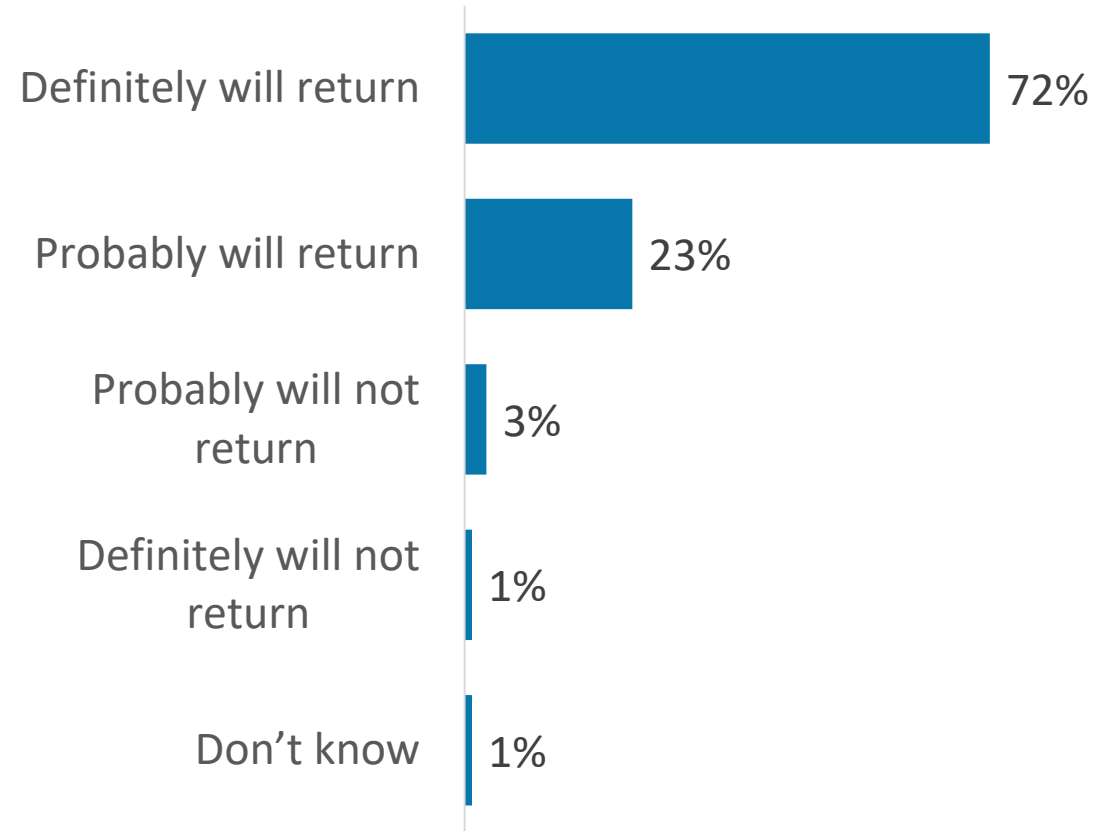
# VISITOR JOURNEY: POST-TRIP EVALUATION



# SATISFACTION WITH SOUTH WALTON

Visitors gave South Walton a rating of **8.9<sup>1</sup>** as a place to vacation, slightly down from 9.2 in 2019

**95%** will return to South Walton.<sup>2</sup>



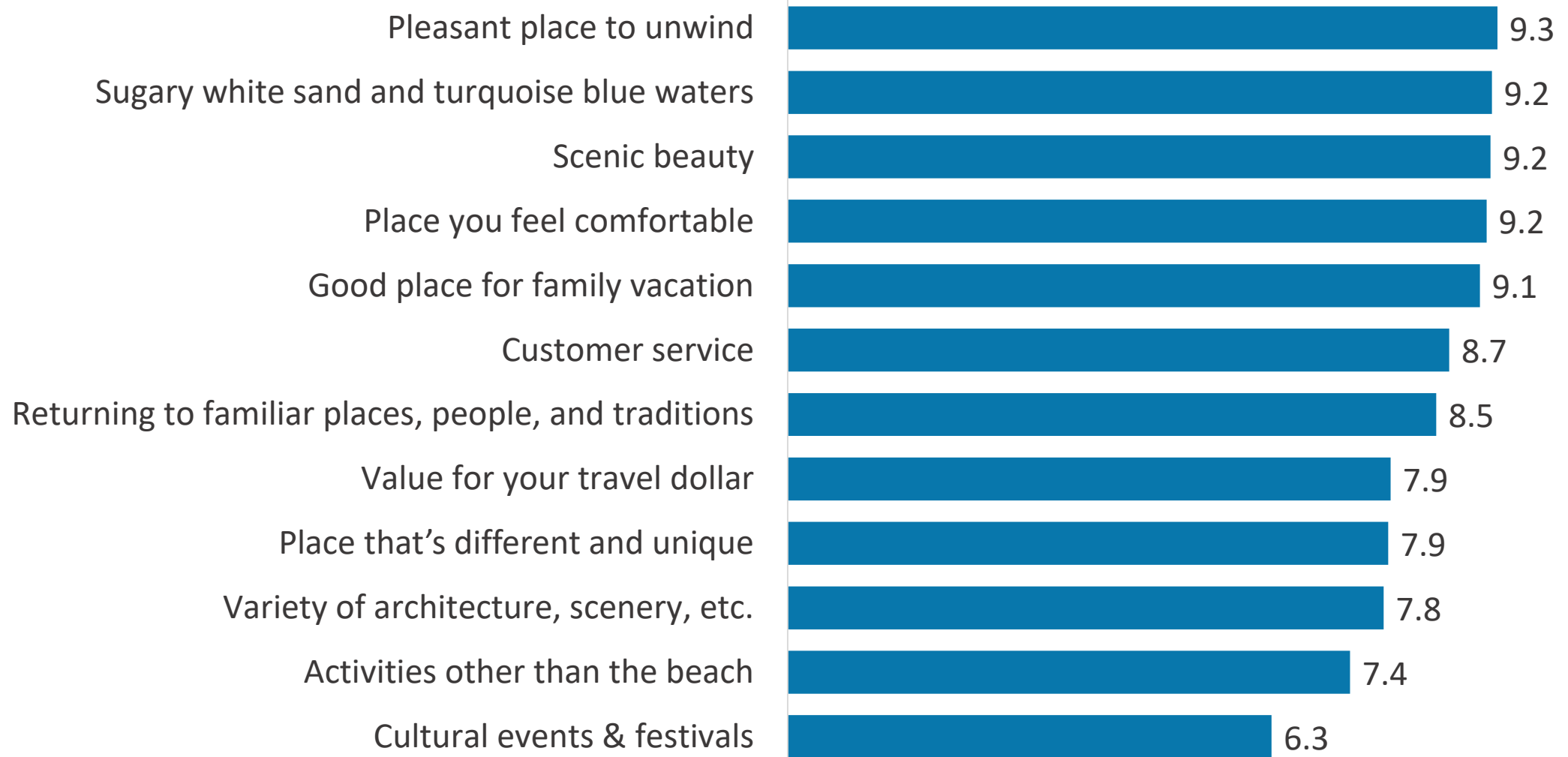
1

10 = Excellent; 1 = Poor

<sup>2</sup>4% of all visitors will not return to South Walton for the following reasons:

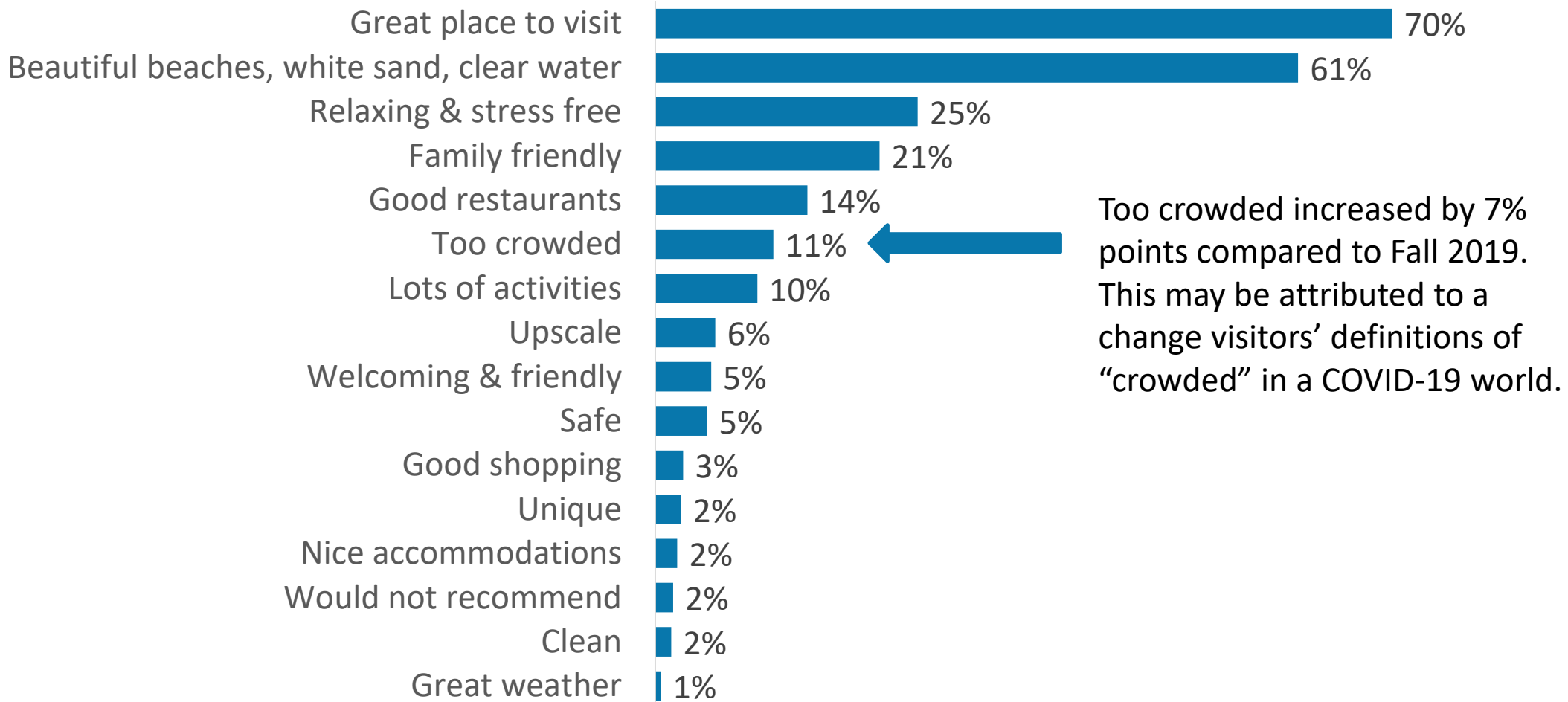
1. Too crowded 2. Too expensive 3. Traffic was a problem

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



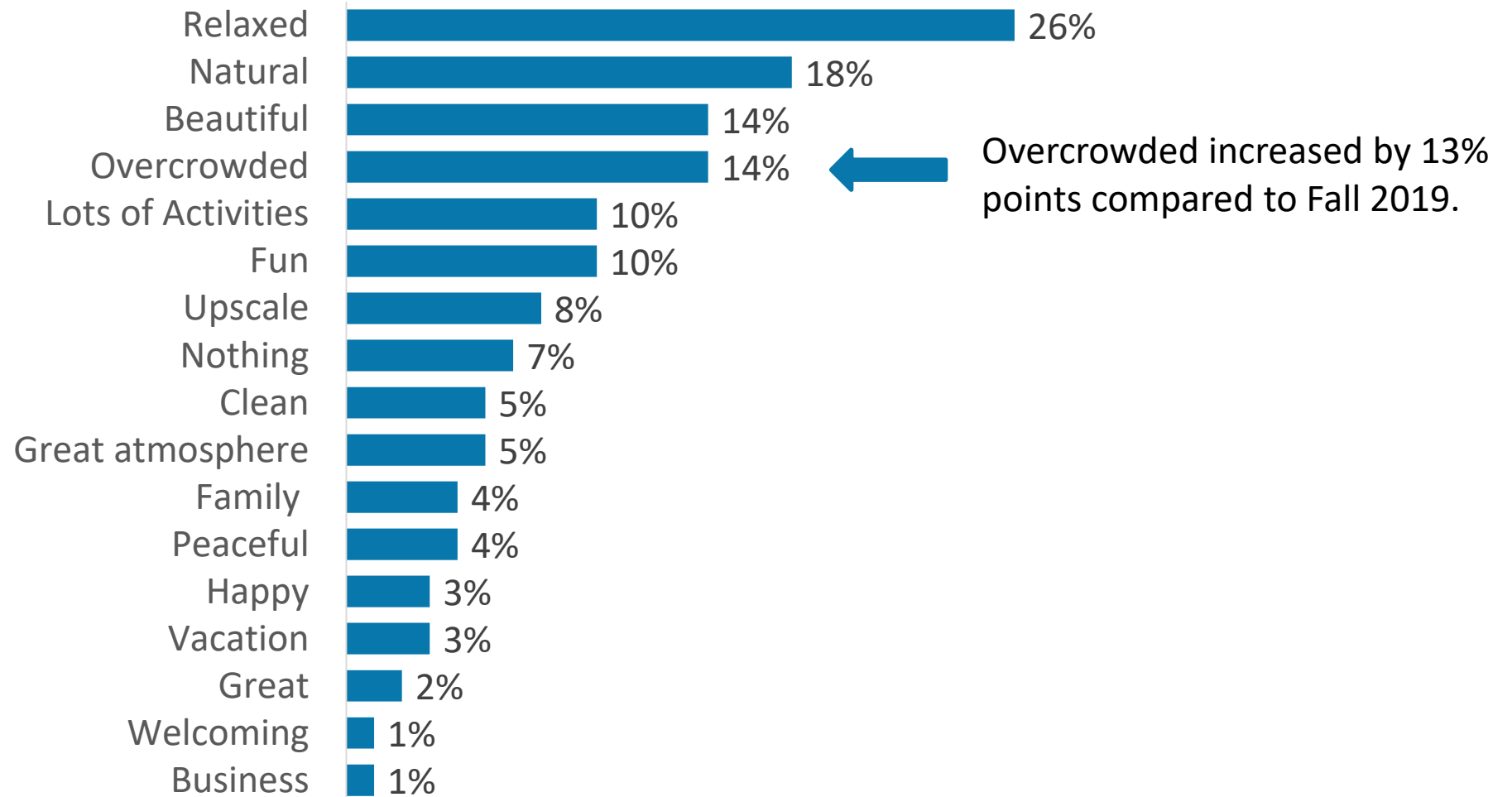
<sup>1</sup>Rated on a scale from 1 to 10 where 1 is poor and 10 is excellent.

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



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

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



<sup>1</sup>Coded 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