



Visit South Walton

Visitor Tracking Study Winter 2019

Study Objectives

- Profile travel parties to South Walton
- Motivation for visiting
- Likelihood of returning
- Mode of transportation
- Importance of vacation attributes & rating of South Walton
- Daily expenditures & expenditures by category
- Trip planning information
- Use of South Walton Visitors Guide
- Noticed South Walton messaging
- Demographic profile of visitors

Methodology

- Internet & on-site surveys
- Sample Size – 808 completed interviews¹
- Target Individuals: Visitors to South Walton in December 2018, January 2019, and February 2019

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. It should be noted that 375 interviews were conducted via face-to-face interviews along the beach and in public areas. This is a higher number than in Winter 2018.

Executive Summary

Tourism Metrics – Winter 2018 vs. 2019

An increase in active units from 12,643 in Winter 2018 to 13,367 in Winter 2019, coupled with increases in occupancy and ADR led to an increase in TDT of 12.2%.

Numbers of visitors were up 10.5%, which resulted in direct spending being up 10.8%.

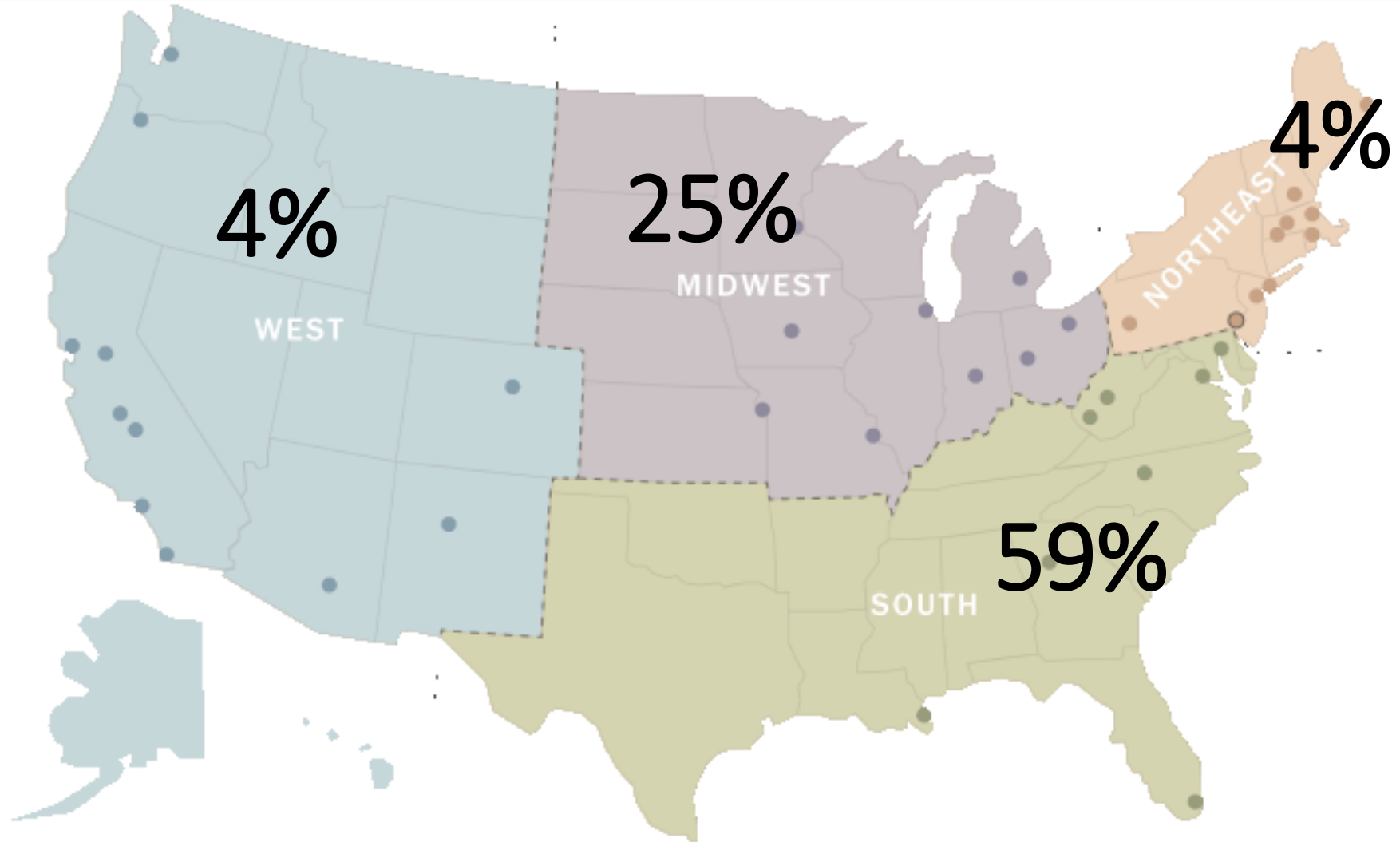
With occupancy and room rates up modestly, RevPAR was up 6% despite the inventory increase.

Property Statistics	Winter 2018 ¹	Winter 2019 ¹	% Change
Room nights	455,150	505,280	11.0%
Total visitors	346,900	383,250	10.5%
TDT collections	\$1,779,126	\$1,996,365	12.2%
Direct spending	\$505,494,000	\$560,087,400	10.8%
Economic impact	\$748,131,100	\$828,923,800	10.8%
Occupancy	40.1%	41.9%	4.5%
Room rates	\$147.92	\$150.12	1.5%
RevPAR	\$59.32	\$62.90	6.0%

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

¹Adjustments were made to data based on updated figures from the Walton County Tax Collector and data on a wider range of vacation rentals from Key Data.

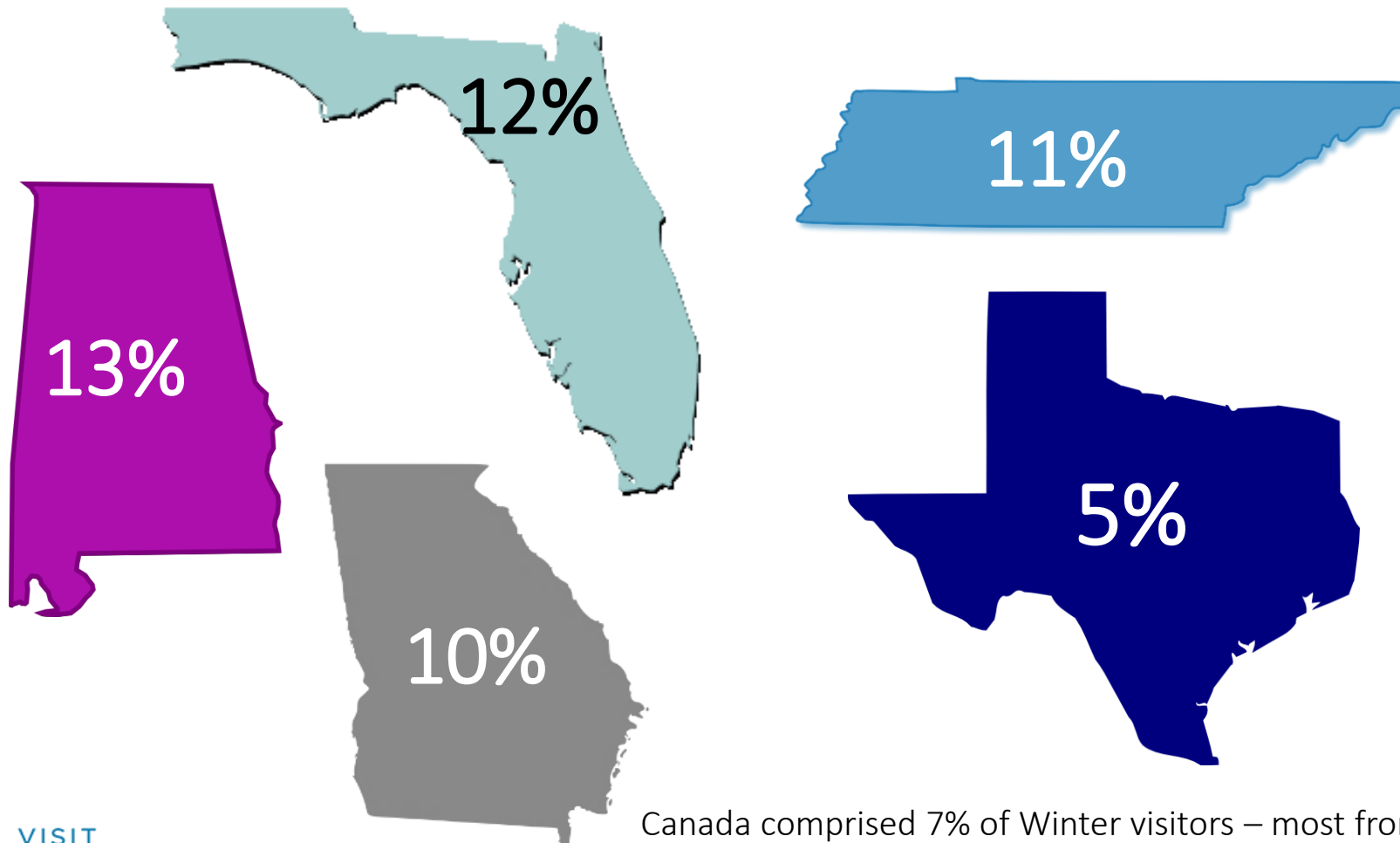
Origin of Visitors



8% of visitors were from areas outside the U.S.

Origin of Visitors

- **51%** of visitors were from 5 states



Top 5 States
Florida
Alabama
Tennessee
Georgia
Texas

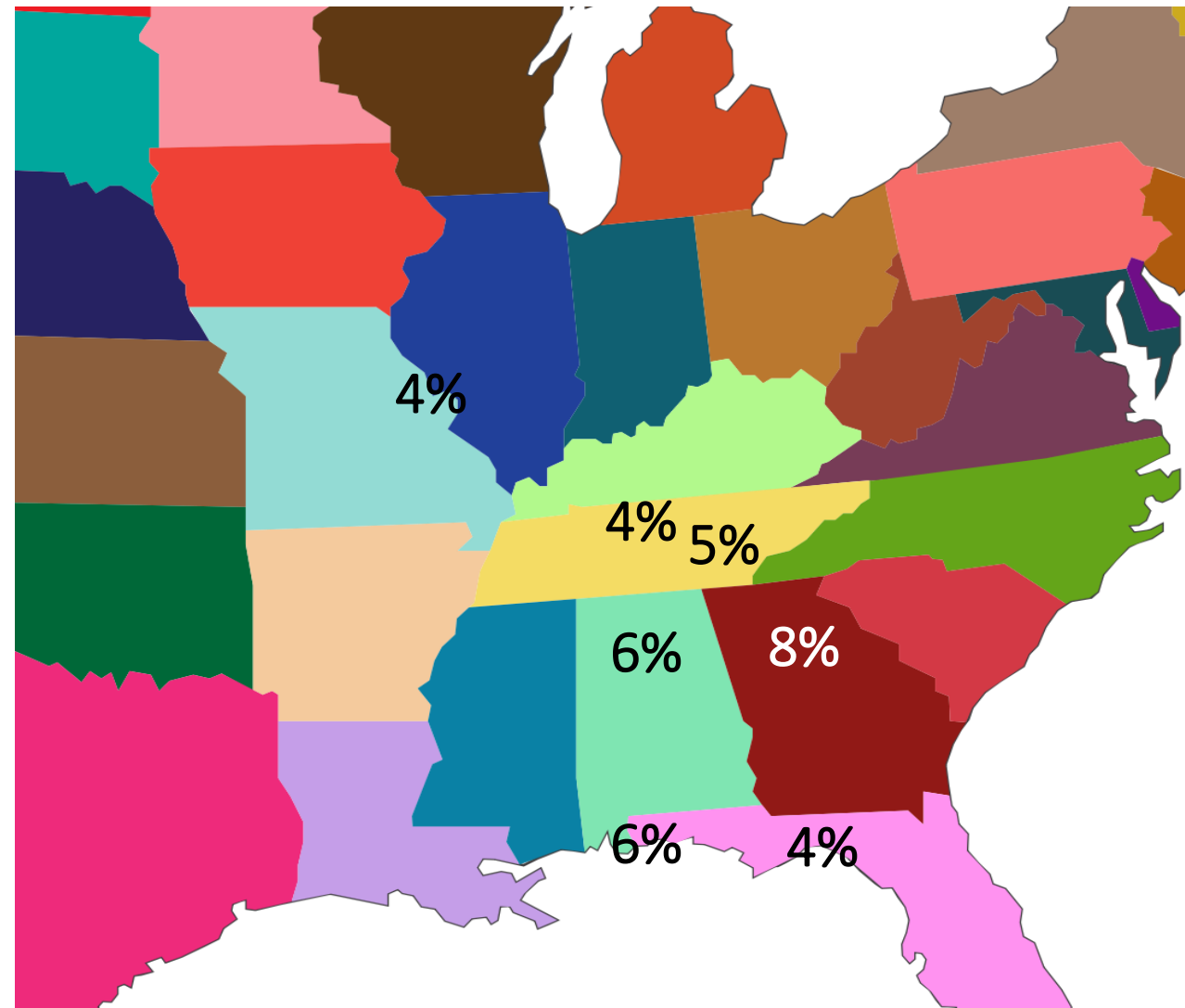
Canada comprised 7% of Winter visitors – most from the Toronto and Montreal metro areas.

Origin of Winter Visitors

4 in 10 visitors were from 11 U.S. markets

Top Markets	% of Visitors
Atlanta	8%
Pensacola-Mobile	6%
Birmingham	6%
Nashville	5%
St. Louis ¹	4%
Knoxville	4%
Panama City-Destin	4%

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



Accommodations

67% - Condos, rental houses, etc.



13% - Personal condo



11% - Hotels



Travel Parties

The typical visitor traveled in a party composed of **3.4** people



26% traveled with at least one person under the age of 20 in their travel party



Length of stay

- Visitors spent **7.6¹** nights in South Walton



¹ Visitors who stayed 30 or fewer nights.

When considering all visitors, average nights stayed was 17.

Profile – Typical Vacationer¹

→The typical Vacationer¹ Visitor:

→Is 52 years old

→Has a median household income of
\$165,700

→Is female (54%)

→30% travel with children

→71% drove

→Is from:

→ Southeast (64%)

→ Midwest (24%)



¹Travel parties who stayed 1-10 nights.

Profile – Typical Long-Term¹ Visitor

→The typical Long-Term¹ Visitor:

→Is 72 years old

→Has a median household income of \$107,600

→Is female (54%)

→94% did not travel with children

→88% drove

→Is from:

→Midwest (56%)

→Southeast (20%)

→International (18%)



¹Travel parties who stayed more than 10 nights.

Profile – Typical Day Tripper

→The typical Day Trip Visitor:

→Is **51** years old

→Has a median household income of
\$75,900

→Is equally likely to be male or female
(50%)

→**37%** traveled with with children

→**95%** drove to the area

→Is from:

→Florida (**79%**)

→Southeast – not including FL (**17%**)



Top Booking Accommodations

- Visitors used the following to book their Winter trip:

Vacation Rental Company (57%)

NEWMAN-DAILEY
RESORT PROPERTIES, INC.

ROSEMARY
BEACH
COTTAGE RENTAL COMPANY

Southern
RENTALS & REAL ESTATE

DUNE ALLEN REALTY
Vacation Rentals

HOMEOWNER'S
COLLECTION
Seaside, Florida

Hotel/condo (29%)

Residence
Inn®
Marriott



THE
PEARL
hotel • dining • spa

VRBO, Homeaway (8%)

HomeAway®

VRBO®
from HomeAway®

VacationRentals.com™
Part of the HomeAway Family

Transportation

- 76% of visitors **drove** to South Walton
- 20% who **flew** used the following airports:

41%

Northwest Florida Beaches
International Airport



33%

Destin-Ft. Walton Beach Airport



14%

Pensacola International
Airport



Visitation

- 17% were first-time visitors
- 39% had visited more than 10 times



Visitor satisfaction

- Visitors gave South Walton a rating of **9.1¹** as a place to vacation
- **94%** will return to South Walton²



¹10 = Excellent; 1 = Poor

²About 4% of visitors will probably not return to South Walton because of the following reasons:

1. Prefer variety in vacation spots, 2. traffic was a problem, 3. too crowded

Top reasons for visit¹

To relax and unwind (58%)



Family vacation (38%)



Annual routine (32%)



Special occasion (10%)



¹Multiple responses permitted.

Top activities during visit¹

Restaurants (94%)



Relax and unwind (85%)



Beach (79%)



Shopping, antiques (76%)



Family time, reading, cooking (59%)



Biking, running, etc. (37%)



Bars & Nightclubs (31%)



Special Events (28%)



Visitor spending

- Visitors spent **\$645** a day
- Visitors spent **\$4,902** on their trip

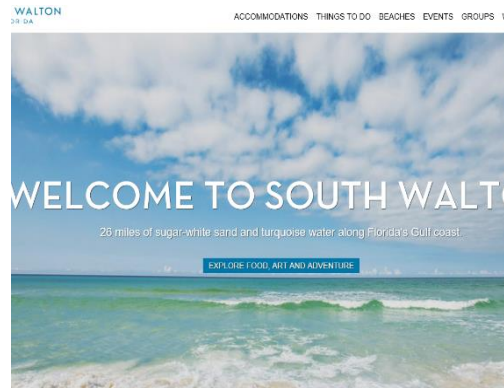


Trip planning

- **4 in 10** visitors plan a Winter South Walton vacation 6 months out or more
- Top trip planning sources:
 Friends, family



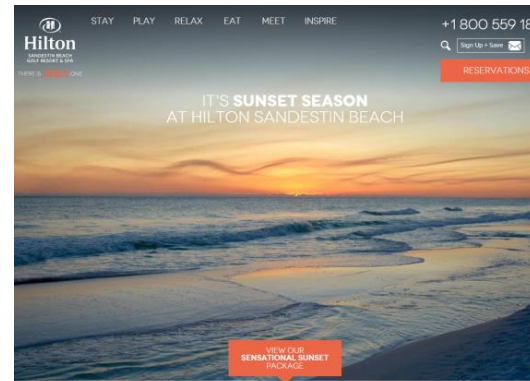
VisitSouthWalton.com



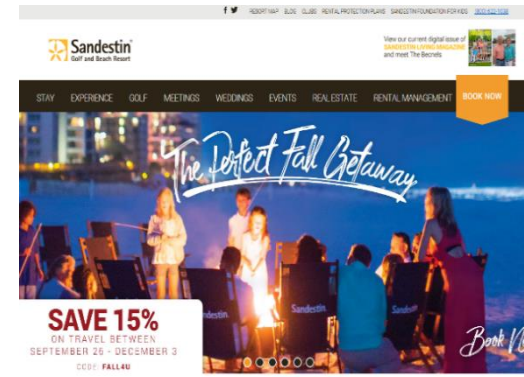
Search on Google, Yahoo, etc.



Hotel websites



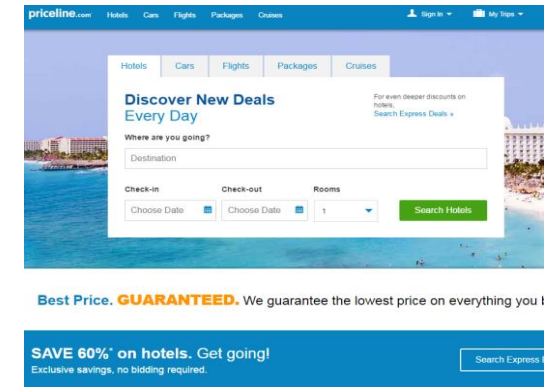
Website for 1 of the 16 beach areas in South Walton



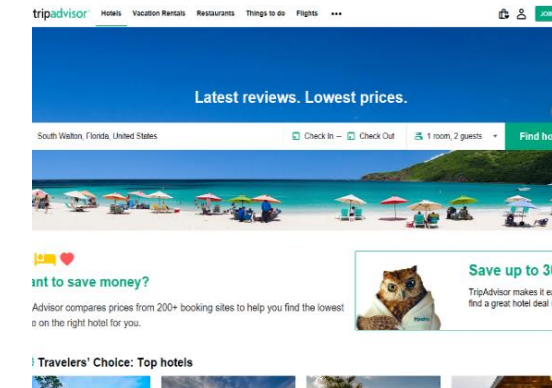
Brochures/travel guide/visitors guide



Travel websites



Online travel reviews and blogs



Visitors guide

- **18%** of visitors viewed the South Walton Visitors Guide before going to South Walton
- Visitors Guide received a rating of **7.1 out of 10¹**

¹10 = Extremely useful; 1 = Not at all useful



Other destinations

- When planning their trip to South Walton:
 - **61%** of visitors considered going to only 1 of the 16 beach communities
 - **29%** considered going to another South Walton beach community



South Walton Promotions

- **29%** of Winter visitors have recently seen, read, or heard advertising, promotions or travel stories about South Walton
- Top sources of recall:

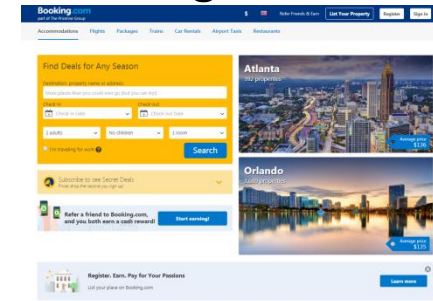
Television



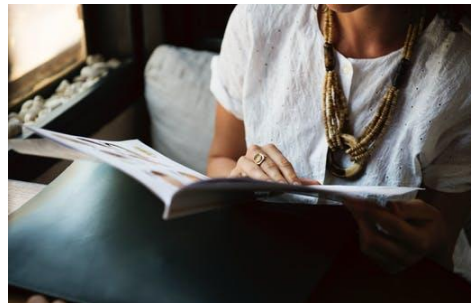
Magazine article



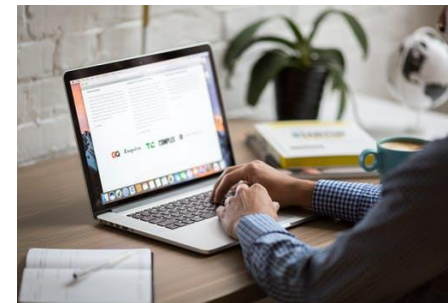
Rental agency/
booking websites



Magazine Ad



Online article



Perceptions of South Walton



Great place to visit

“Great place, especially in the off season and arriving and departing mid-week. Beautiful beaches. Usually great weather.”



Beautiful beaches

“It's beautiful! Even though it was a cold January, it was pleasant walking on the beach. I want to move there soon. The people are so friendly and helpful. You've got to go there! You'll love it, you won't want to leave.”



Relaxing

“Our visit was very delightful and relaxing. Morning walks on the beach, a fantastic farmers market, fabulous local dining, and star gazing at night were some of our favorite activities.”



Good restaurants

“South Walton is full of great and different styles of restaurants. The sand at the beach is so white. It's a good place to go with friends or family. Shopping is great.”

Emotions and feelings associated with South Walton¹



¹Coded verbatim responses; multiple responses permitted.

Demographics



- The typical South Walton Winter visitor:
 - **56** years old
 - **Female (53%)**
 - **Median** household income of **\$154,700**
 - **Average** household income of **\$211,000**
 - From the **Southeast (59%)**

Yearly Comparisons

Visitor Profile – Winter 2018 vs. 2019

Visitor Metrics	Winter 2018	Winter 2019
Travel party	3.5	3.4
Kids <20	23%	26%
Median age	59	56
Estimated median household income	\$152,500	\$154,700 ¹
Stayed in condo/rental house	84%	67%
Drove	85%	76%
Nights spent ²	7.4	7.6 ²
Direct expenditures (entire trip) ²	\$4,884	\$4,902
1 st time visitor	21%	17%
10+ visits to South Walton	36%	39%

¹Estimated average household income = \$211,000.

²Visitors who stayed in paid accommodations for up to 30 nights.

Visitor Profile – Winter 2018 vs. 2019

Top Origin States	Winter 2018	Winter 2019
Alabama	10%	13%
Florida	12%	12%
Tennessee	5%	11%
Georgia	10%	10%
Canada	6%	7%
Texas	5%	5%
Origins - Regions	Winter 2018	Winter 2019
Southeast	52%	59%
Northeast	6%	4%
West	2%	4%
Midwest	33%	25%
International	7%	8%*

*7% were from Canada.

Visitor Profile – Winter 2018 vs. 2019

Visitor Activities	Winter 2018	Winter 2019
Restaurants	93%	94%
Beach	72%	79%
Relax and unwind	79%	85%
Shopping, antiquing	74%	76%
Family time, reading, cooking, etc.	56%	59%
Biking, running, etc.	35%	37%
Bars, nightclubs	36%	31%
Special events	28%	28%
Hiking, nature walks, bird watching, eco tours	26%	27%
Golf or tennis	30%	26%
State parks	17%	26%
Attractions	20%	19%

Visitor Profile – Winter 2018 vs. 2019

Visitor Metrics	Winter 2018	Winter 2019
Will return to South Walton	91%	94%
Rating for overall experience ¹	9.0	9.1 ¹
Viewed Visitors Guide	21%	18% ²
Planned trip	4 – 6+ months out	6+ months out
Used VisitSouthWalton.com	20%	17%
Used 1 of 16 beaches' websites	30%	25%
Use the term "South Walton"	17%	15%

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

²14% used the online version & 4% used the print version.

Tourism Metrics – Winter 2018 vs. 2019

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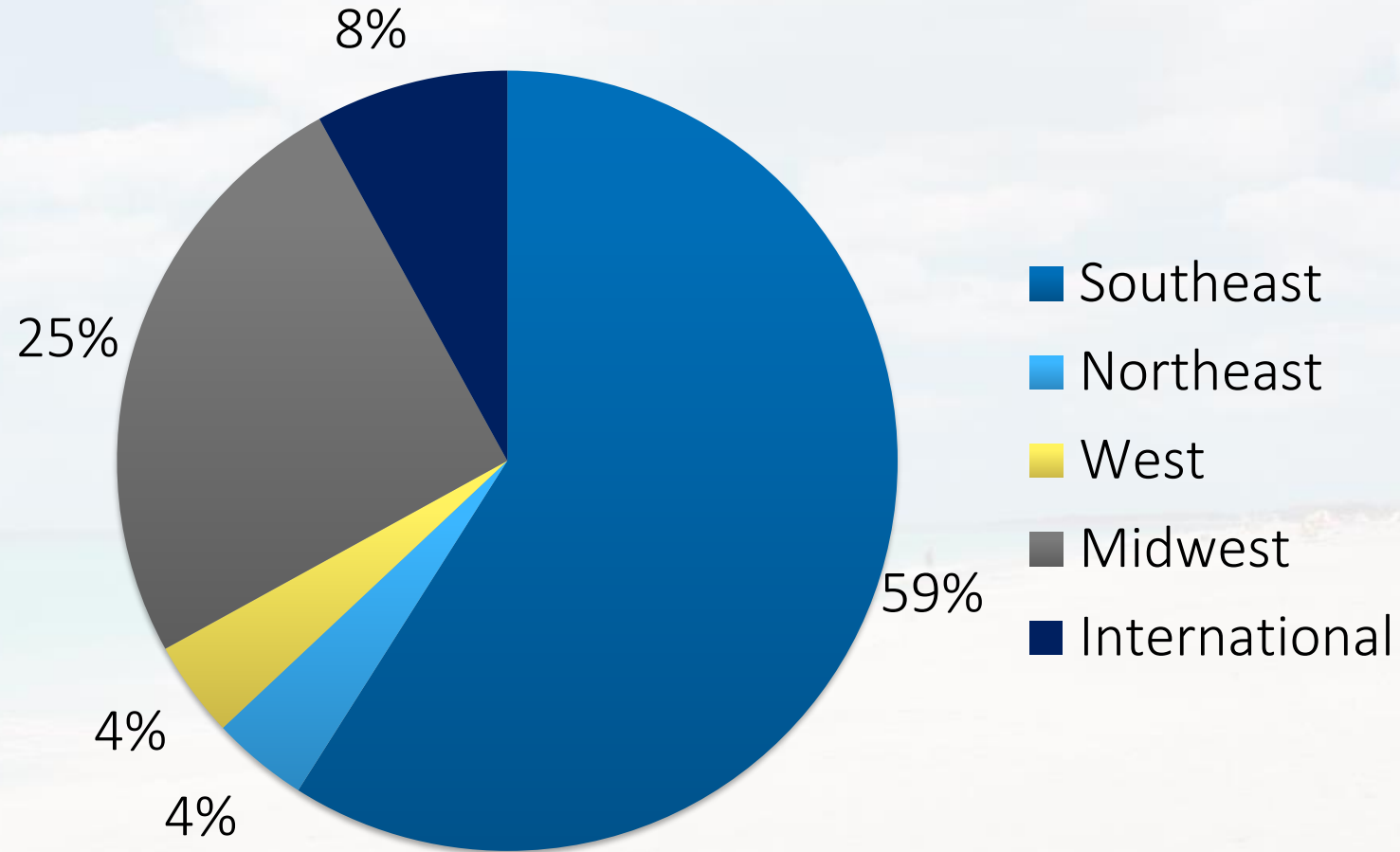
Detailed Findings

Typical South Walton Winter Visitor

- Travel party = **3.4** people
 - **26%** traveled with at least one person under the age of 20 in their travel party
- Was **56** years old
- Was female (**53%**)
- Had a median household income of **\$154,700**
- Was from the **Southeast (59%)**
- Stayed in a **condo or rental house (67%)**

Origin of Winter Visitors

Top Origin Markets	% of Visitors
Atlanta	8%
Pensacola-Mobile	6%
Birmingham	6%
Nashville	5%
St. Louis ¹	4%
Knoxville	4%
Panama City-Destin	4%
New Orleans	2%
Minneapolis	2%
Dallas-Ft. Worth	2%
Montgomery	2%
Chicago	2%
Cincinnati	2%
Detroit	2%
Milwaukee	2%
Chattanooga	2%
Jacksonville	2%
Dothan	2%
Houston	2%
Tallahassee	2%
New York City	2%
San Antonio	2%
Columbus, OH	2%



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

Origin of Winter Visitors

- 7 in 10 Winter visitors live in 12 states

Alabama	13%
Florida	12%
Tennessee	11%
Georgia	10%
Texas	5%
Illinois	4%
Wisconsin	3%
Indiana	3%
Ohio	3%
Louisiana	3%
Missouri	3%
Michigan	3%

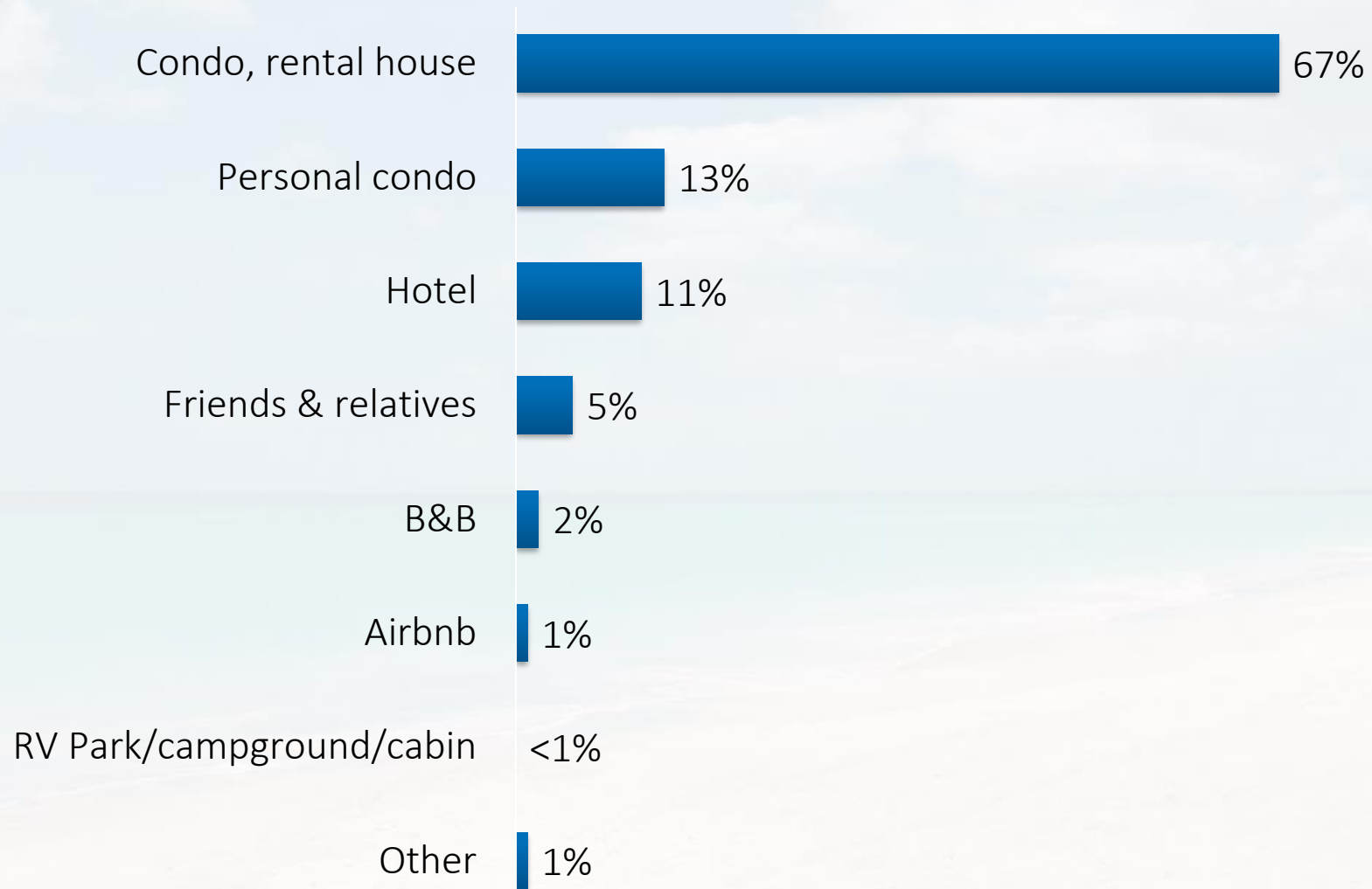
Canada = 7%

South Walton Visitor Transportation

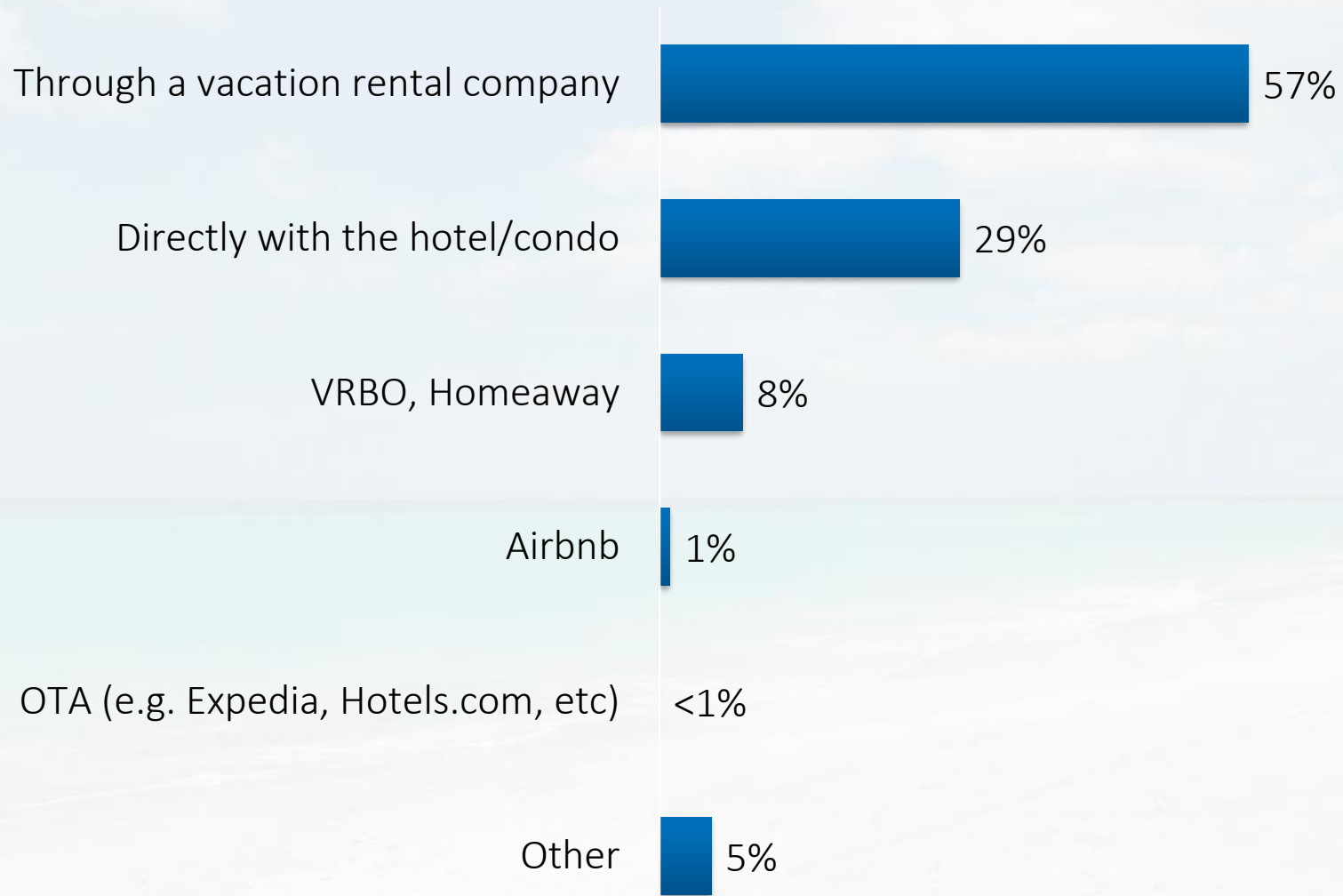
- **76%** of visitors **drove** to South Walton
- **20%** of those who drove were aware that there were direct flights from their city to the South Walton area
- **24%** who **flew** used the following airports:



Visitors' Accommodations

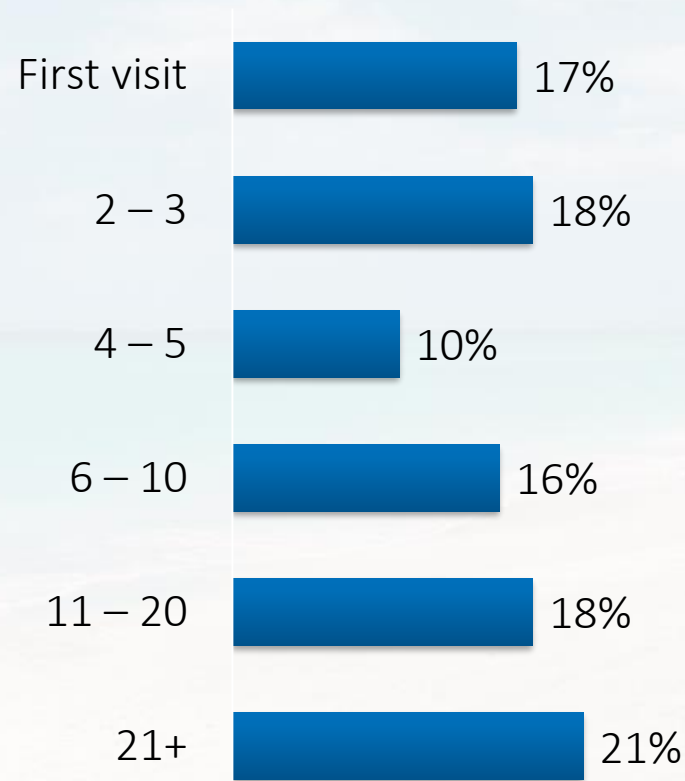


Booking Accommodations



Typical South Walton Winter Visitor

- Spent **7.6 nights¹** in South Walton
- **17%** were **first time** visitors
- **39%** had visited more than 10 times



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

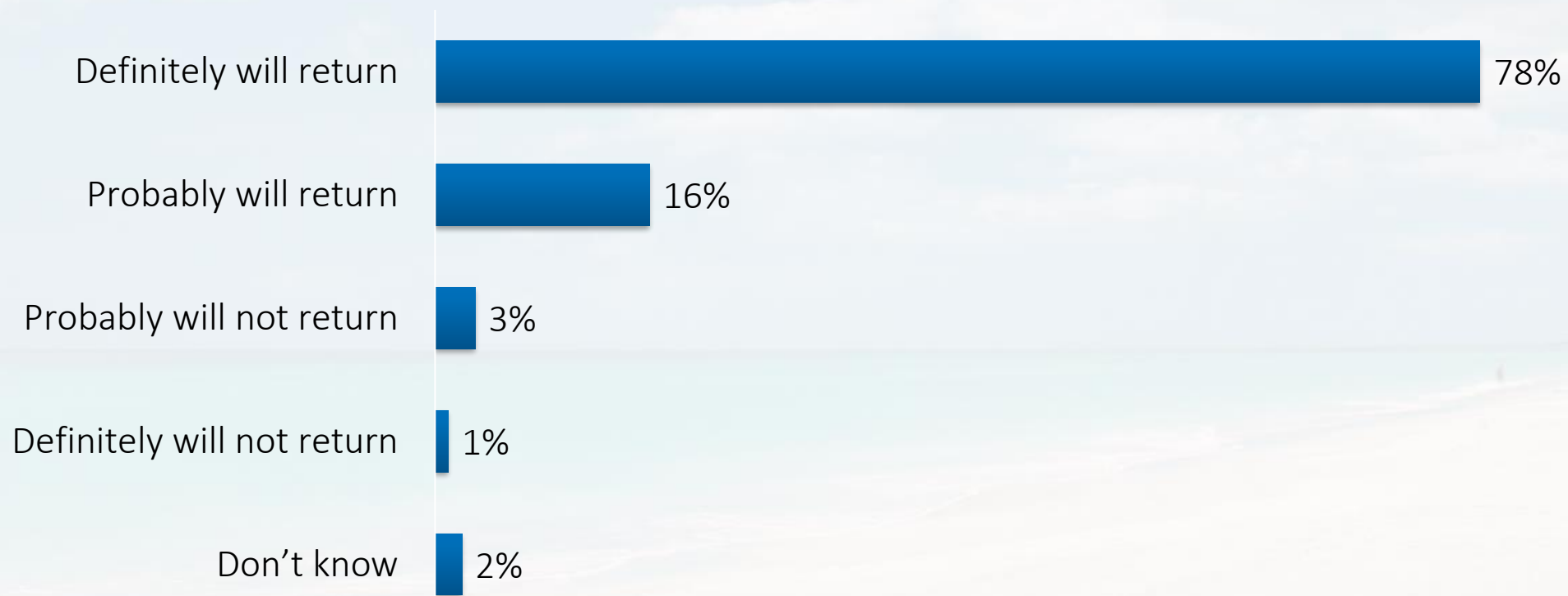
Reasons for visiting¹



¹Multiple responses permitted.

Satisfaction with South Walton

- Gave South Walton a rating of **9.1**¹ as a place to vacation
- **94%** will return to South Walton²



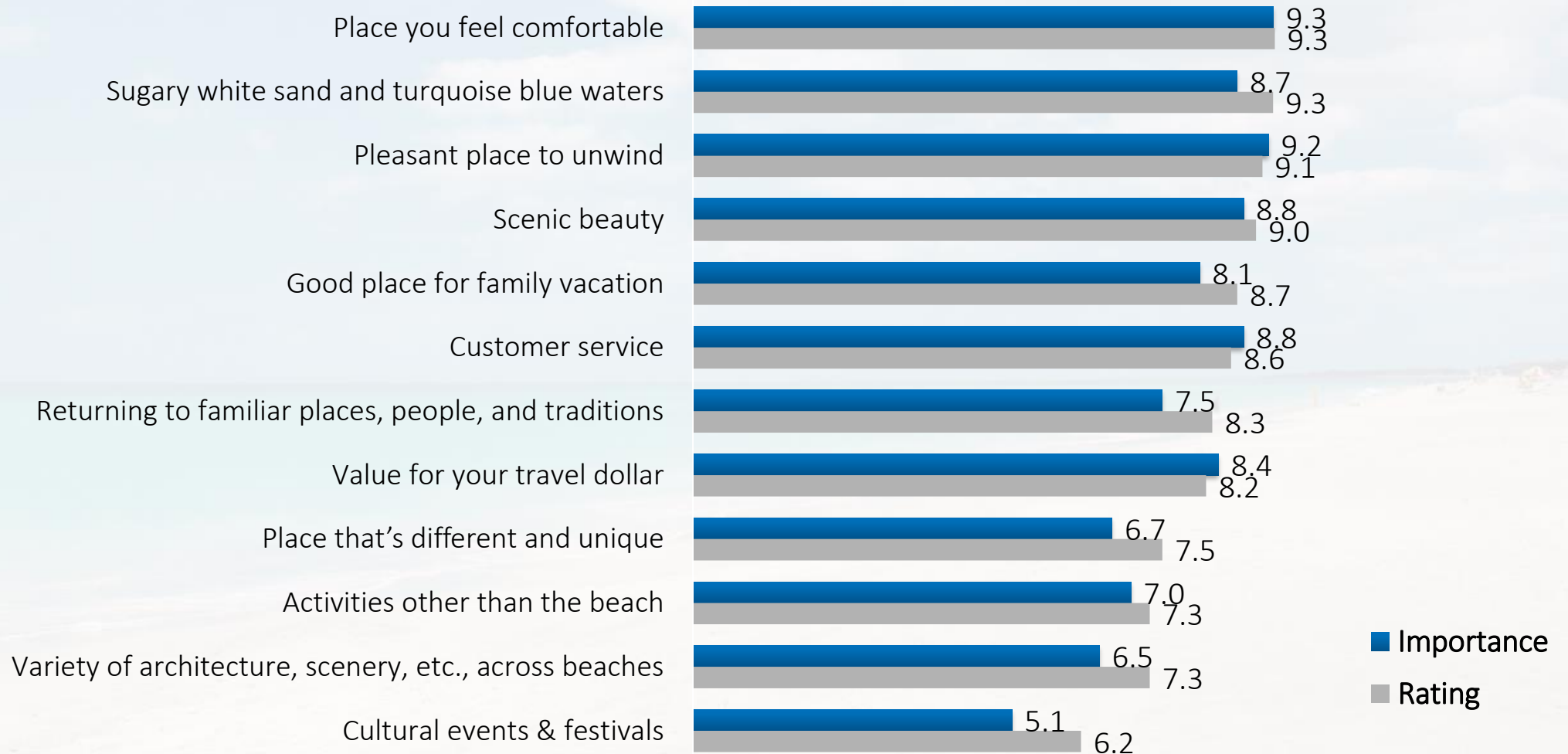
¹10 = Excellent; 1 = Poor

²About 4% of visitors will probably not return to South Walton because of the following reasons:

1. Prefer variety in vacation spots,
2. traffic was a problem,
3. too crowded

South Walton Attributes: Gap Analysis

Importance of attributes when choosing destinations vs. **ratings** for South Walton



Typical South Walton travel party expenses¹

- Spent **\$645** a day
- Spent **\$4,902** on their trip: +0.4% higher compared to 2018.

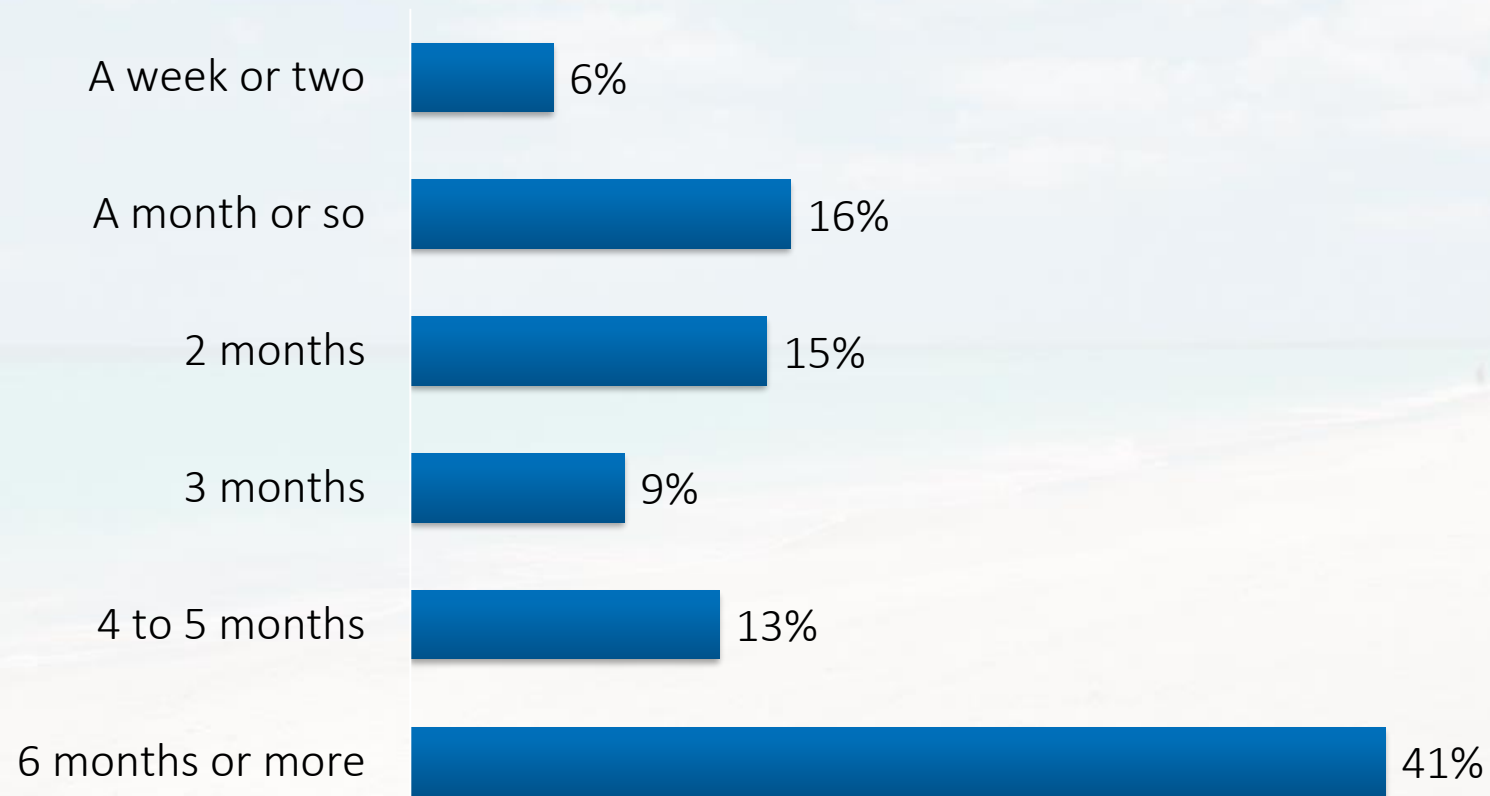
	Average Daily Expenditure	Total Trip Expenditure
Accommodations	\$218 ²	\$1,657
Restaurants	\$146	\$1,110
Groceries	\$47	\$357
Shopping	\$101	\$768
Entertainment	\$59	\$448
Transportation	\$39	\$296
Other	\$35	\$266
Total	\$645	\$4,902

¹ For visitors staying 30 days or fewer.

² 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.

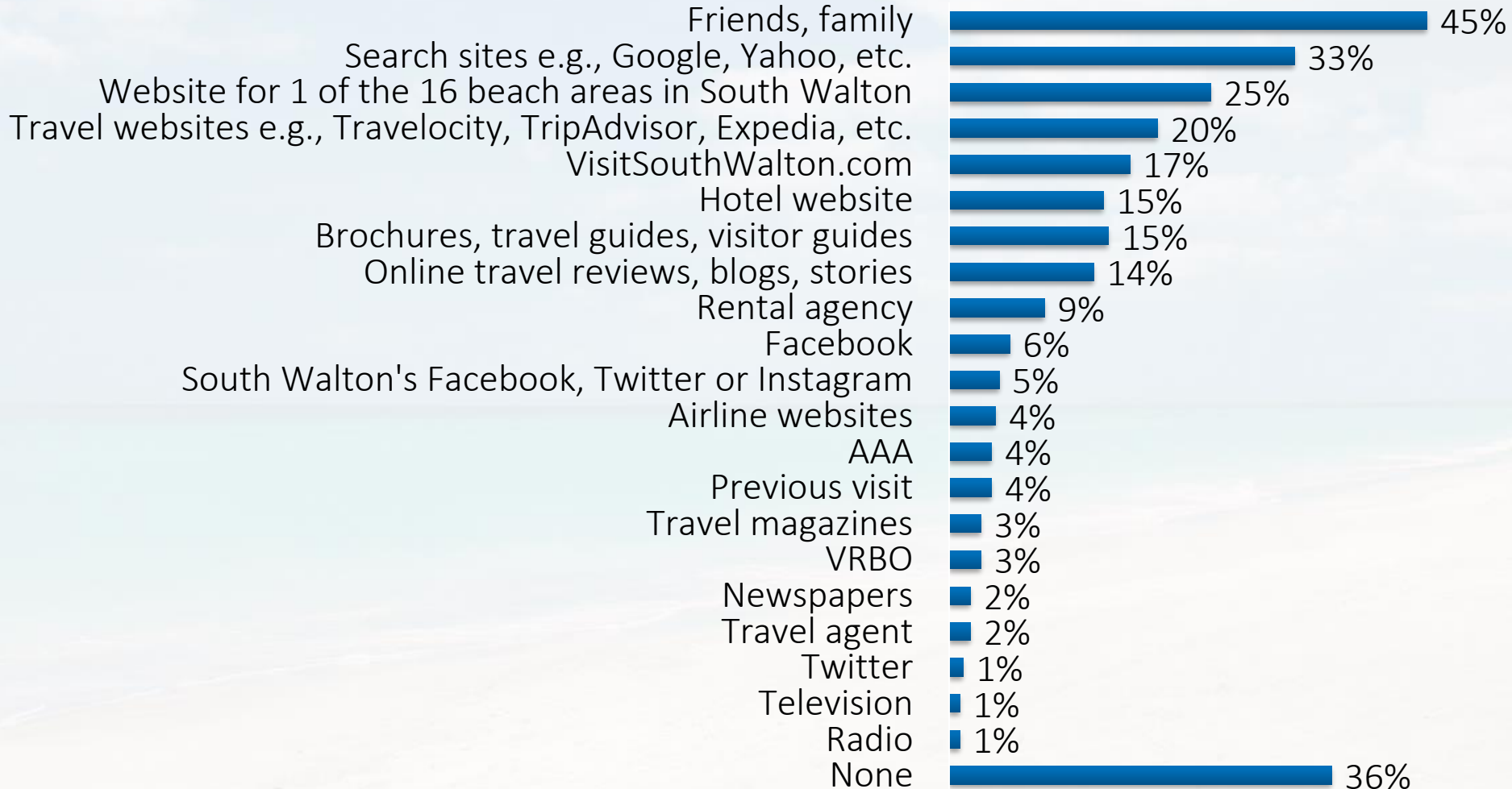
Planning cycle

- **4 in 10** visitors plans a Winter South Walton vacation 6 months out or more
- Relatively few visitors to South Walton have a short (a month or less) planning cycle



Planning sources

- Visitors use the following sources to plan their trips to South Walton¹:



¹Multiple responses permitted.

Typical South Walton visitor

- **18%** of visitors viewed a South Walton Visitors Guide before going to South Walton
 - 4% requested a print version
 - 14% viewed the online version
- Visitors Guide received a rating of **7.1 out of 10¹**

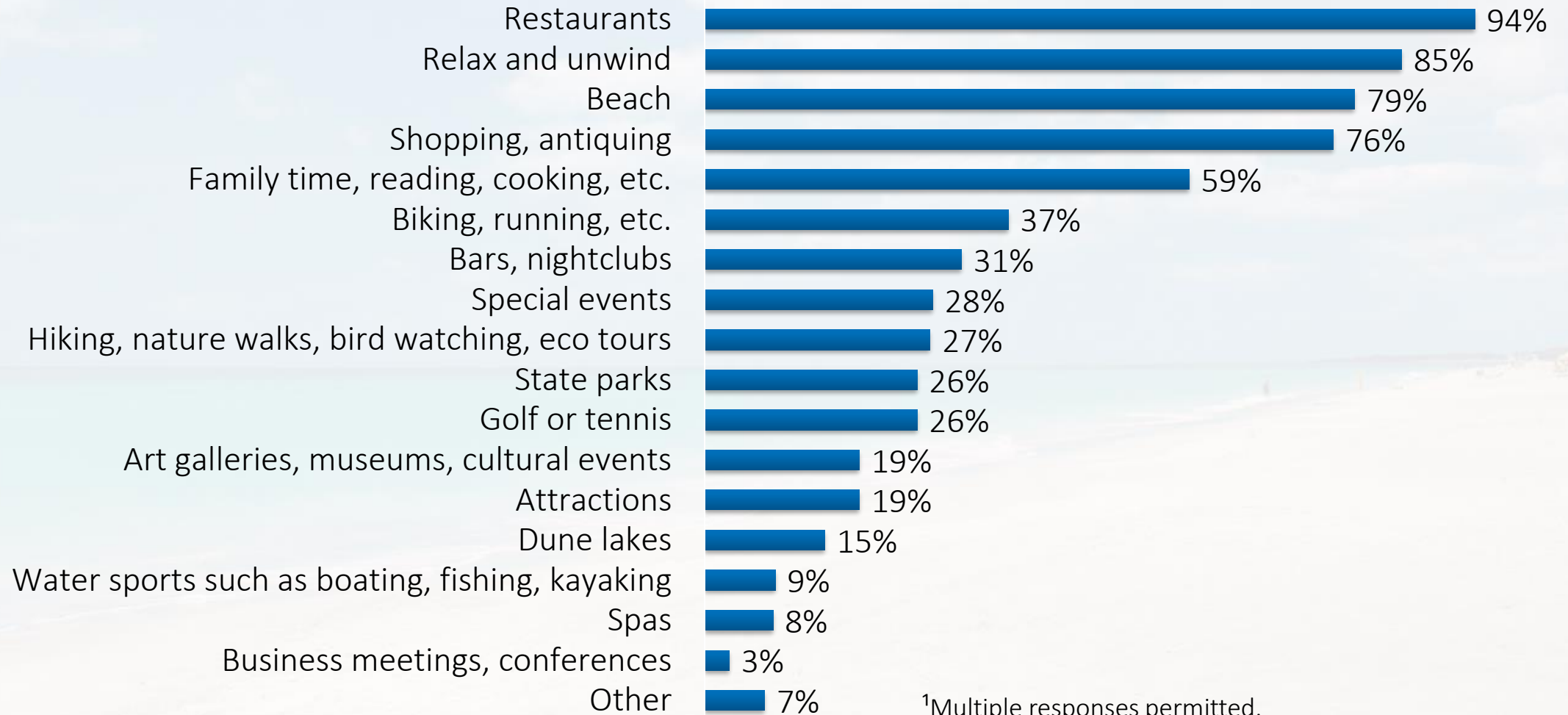
¹Rated on a 10 point scale where 10 is extremely useful and 1 is not at all useful.

Typical South Walton visitor

- When planning their trip to South Walton:
 - 61% - considered going to only 1 of the 16 beach communities
 - 29% - considered going to another South Walton beach community
 - 9% - considered vacationing outside of South Walton
 - 2% - considered going to a beach destination outside of Florida

Activities in market

- Visitors engaged in the following activities on their last trip to South Walton¹:



¹Multiple responses permitted.

South Walton Promotions

- **29%** of Winter visitors have recently seen, read or heard advertising, promotions or travel stories about South Walton on the following¹:



→ This information influenced **7%** of visitors to visit South Walton

¹Multiple responses permitted.

Perceptions of South Walton

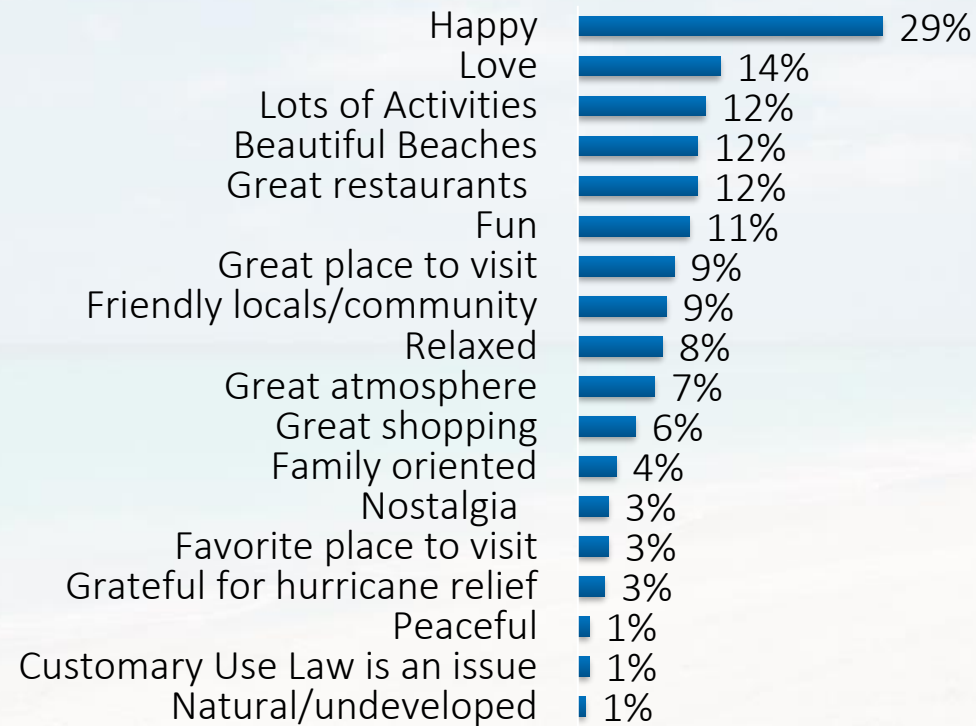
- Winter visitors describe South Walton as being a **great place to visit** and having **beautiful beaches**.¹



¹Coded verbatim response; multiple responses permitted.

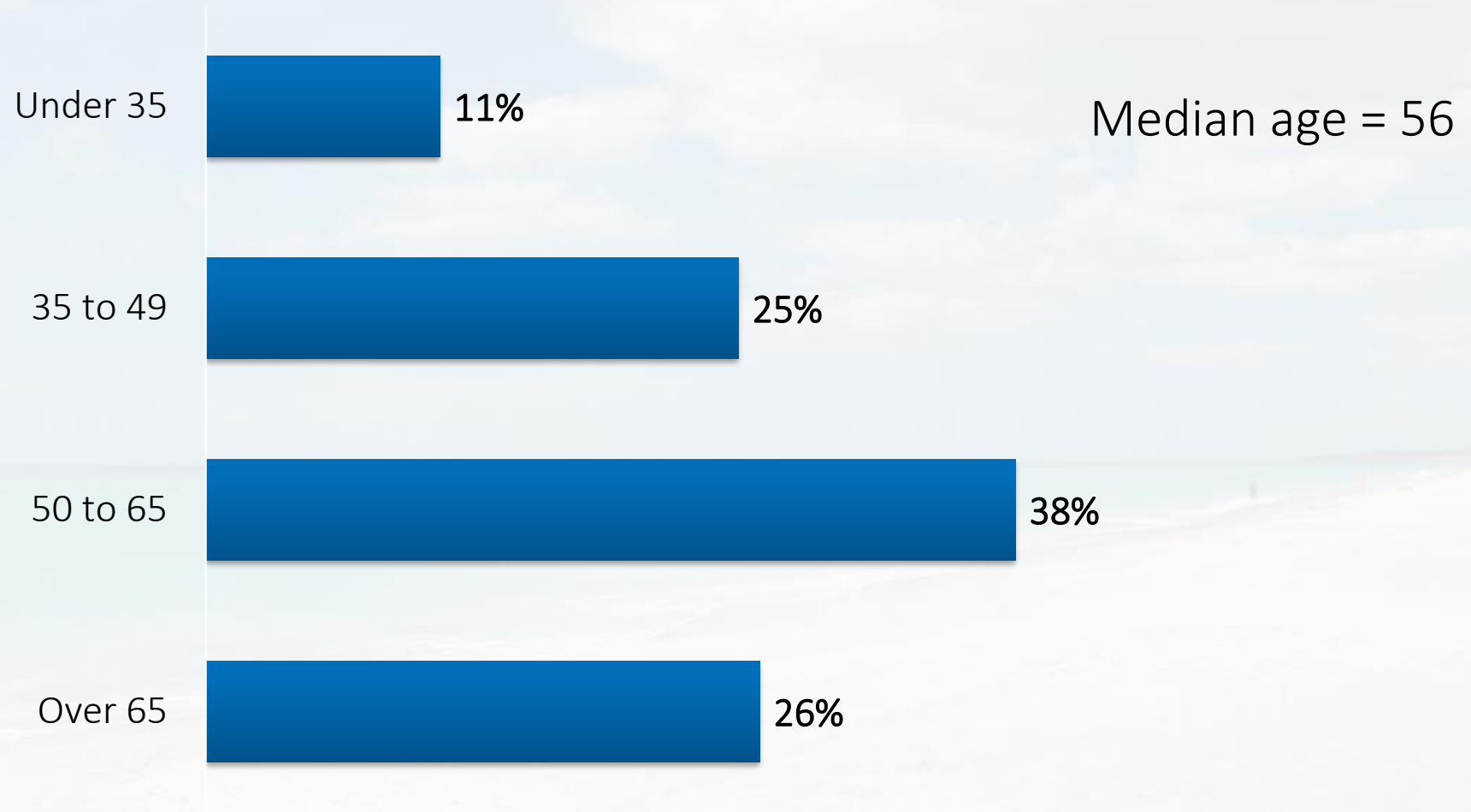
Emotions associated with South Walton

- Winter visitors describe the following feelings or emotions they get when visiting South Walton that they don't get when visiting other beach destinations.¹

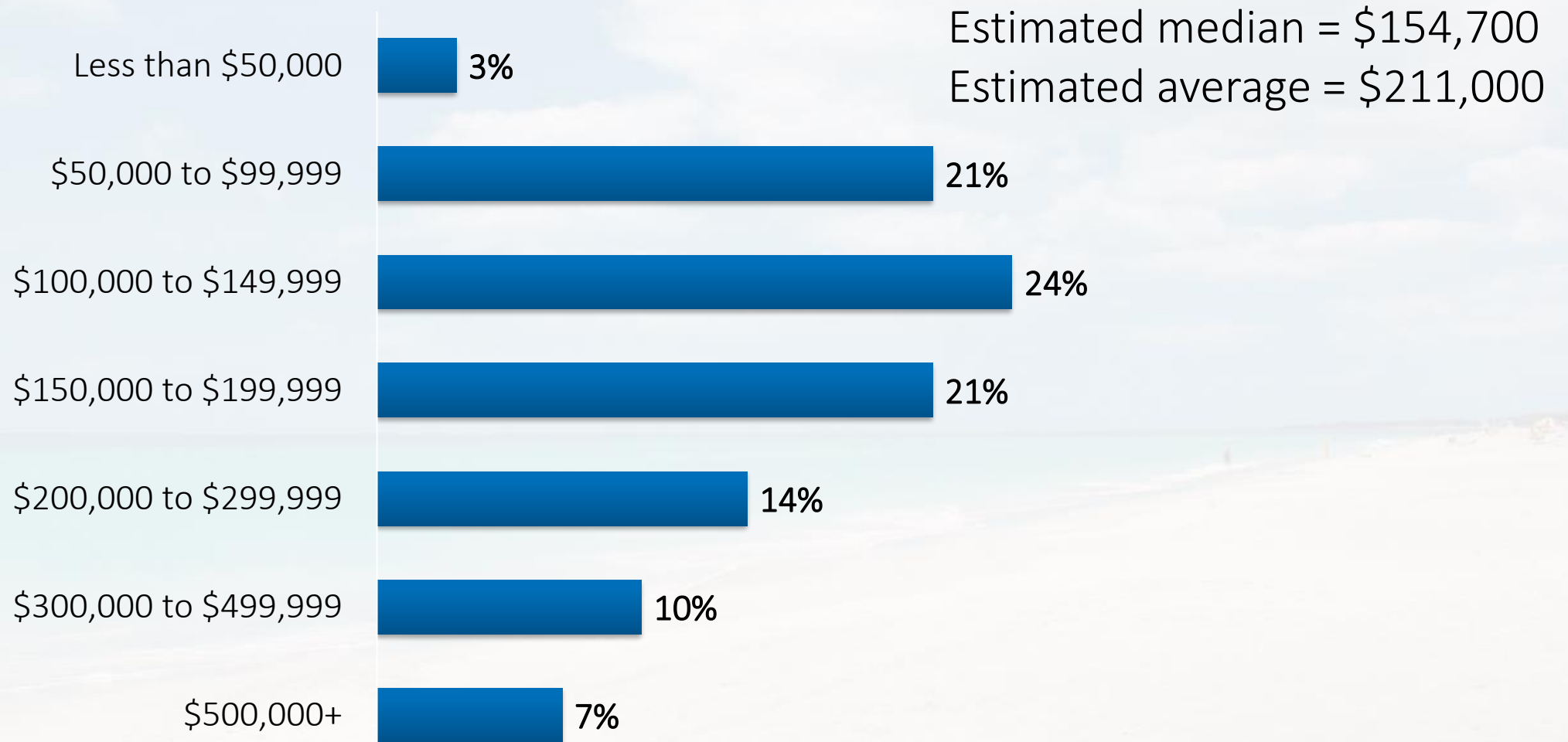


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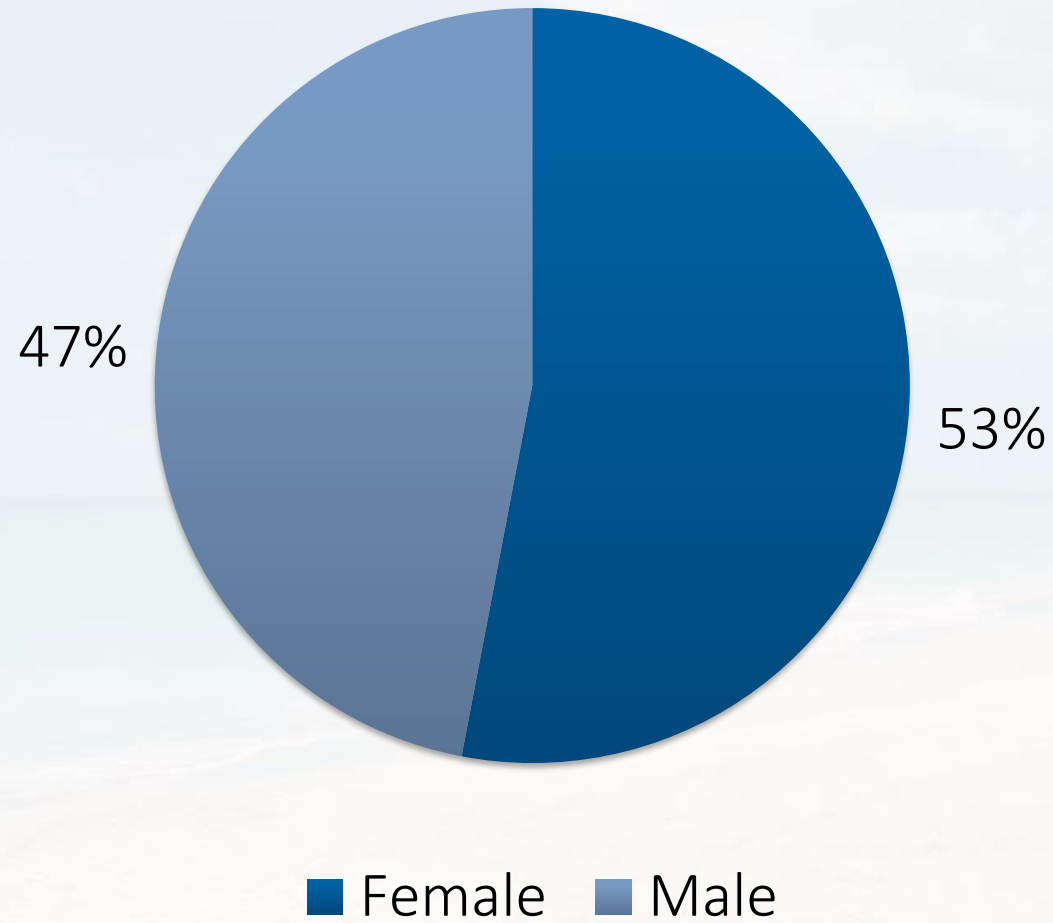
Age of Winter Visitors



Total household income in 2018



Gender





Visit South Walton Winter 2019 Visitor Tracking Study

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