

VISIT SOUTH WALTON

Summer 2021 Visitor Tracking Study
June 2021 - August 2021



TABLE OF CONTENTS

Study objectives & methodology	3
Executive summary	5
Seasonal snapshot	6
Visitor's journey	7
Economic impact	8
Pre-visit	11
Travel party profile	19
Trip experience	27
Post-trip evaluation	34
Yearly comparisons	38
Detailed findings	43
Pre-visit	44
Travel party profile	54
Trip experience	61
Post-trip evaluation	69



STUDY OBJECTIVES: MAP THE VISITOR JOURNEY

Pre-Visit

- Visitor origin
- Planning cycle
- Planning sources
- Visitor Guide usage
- Other destinations considered
- Trip influencers
- Reasons for visiting
- Exposure to promotions
- Booking
- Mode of transportation

Travel Party Profile

- Party size
- Party composition
- Demographics

Trip Experience

- Accommodations
- Length of stay
- Number of times in destination
- Activities in destination
- Visitor Spending

Post-Trip Evaluation

- Likelihood of recommending
- Likelihood of returning
- Evaluation of destination attributes
- Painting a picture for others

Economic Impact on Destination

- Number of visitors
- Expenditures
- Economic impact
- Room nights generated
- Occupancy, ADR, RevPAR

Visitor Tracking Study

This report is based on 1,002 internet and in-person surveys* with Summer visitors who traveled to South Walton between June 2021 and August 2021.

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

- Changes in visitor behavior - Visitors traveled in larger parties and had longer lengths of stay
- Inventory increase - Available units for visitors in Summer 2021 increased 10.5% 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

SUMMER 2021

- South Walton's key metrics in Summer 2021 increased significantly compared to Summer 2020
- Direct spending was up more (+21.1%) than the number of visitors (+7.8%) as South Walton generated higher yield per visitor
- Compared to Summer 2020, ADR jumped 24.1% in Summer 2021
- TDT collections increased 48.9% in 2021 compared to 2020
- With over 2.6 million visitors this Summer, total economic impact was nearly \$2.9 billion, up 21.1% from Summer 2020
- First time visitors to South Walton increased 5% points from 2020, representing nearly 400,000 new visitors



2,617,300

TOTAL
VISITORS

↑ 7.8%



1,304,575

ROOM
NIGHTS

↑ 13.2%



\$1,949,648,000

DIRECT
SPENDING

↑ 21.1%

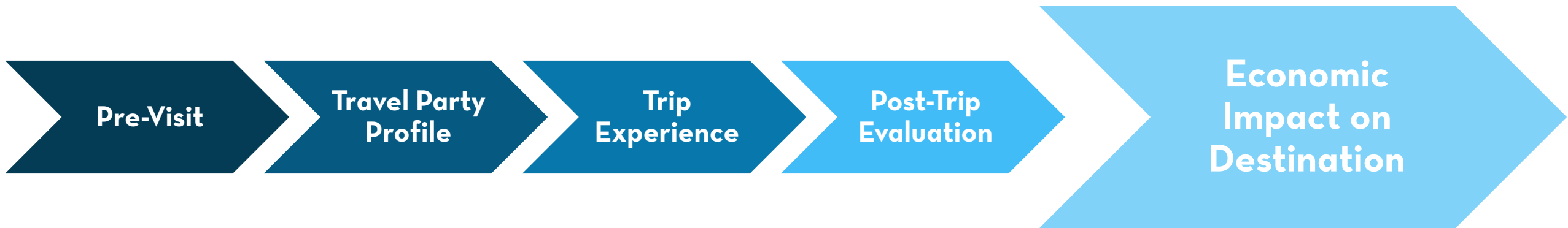
VISITOR JOURNEY:

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 - SUMMER 2020 VS. 2021

An increase of active units by 10.5% from 2020 and more visitors staying in paid accommodations contributed to a significant increase in room nights.

Compared to Summer 2020, ADR jumped 24.1% in Summer 2021. TDT collections increased 48.9% in 2021 compared to 2020.

With over 2.6 million visitors this Summer, total economic impact was nearly \$2.9 billion, up 21.1% from Summer 2020.

Metrics	Summer 2020	Summer 2021	% Δ '21/'20
Room nights	1,152,811	1,304,575	+13.2%
Total visitors	2,428,300	2,617,300	+7.8%
TDT collections	\$19,106,264	\$28,451,642	+48.9%
Direct spending	\$1,609,378,100	\$1,949,648,000	+21.1%
Economic impact	\$2,381,879,600	\$2,885,479,000	+21.1%
Occupancy	80.3%	85.8%	+6.8%
Room rates	\$438.06	\$543.44	+24.1%
RevPAR	\$351.76	\$466.06	+32.5%

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

85.8%

Occupancy

↑ 6.8%

\$543.44

ADR

↑ 24.1%

\$466.06

RevPAR

↑ 32.5%

VISITOR JOURNEY: PRE-VISIT

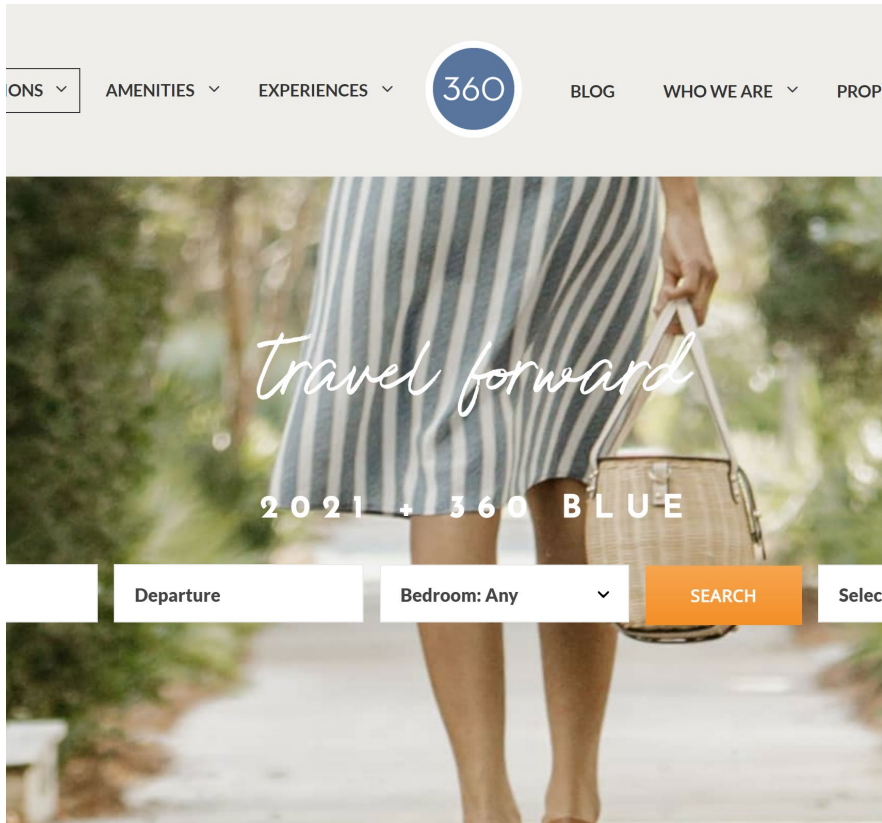


PLANNING CYCLE

- » **75%** of visitors plan a South Walton Summer vacation at least 3 months in advance
- » **Only 5%** of South Walton Summer vacations are impulse decisions (planned a week or two in advance)
- » Over **half** of Summer visitors considered only 1 of the South Walton Beaches as opposed to deciding among several



TOP TRIP PLANNING SOURCES*



Vacation rental website **65%**

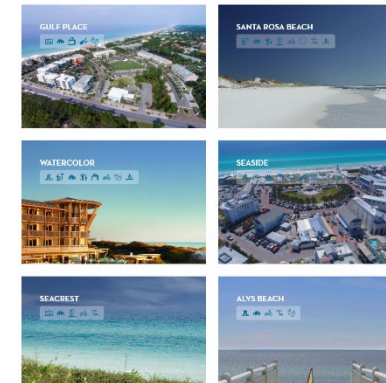
Friends/family **48%**



Search engines **32%**



Website for 1 of the 16 beach neighborhoods **26%**



SOUTH WALTON VISITOR GUIDE

- » **22%** of visitors viewed (mostly online) the South Walton Visitors Guide before going to South Walton
- » Visitors Guide received a rating of **7.4 out of 10¹**



¹10 = Extremely useful; 1 = Not at all useful

TOP REASONS FOR VISIT*

Family vacation **80%**

Relax and unwind **54%**

Annual routine **21%**

Special occasion **10%**



TOP SOUTH WALTON PROMOTIONS

- » **31%** of visitors have recently noticed promotions about South Walton
- » This information influenced **9%** of visitors to visit South Walton

Top Sources of Promotions

Television



South Walton Social Media



Other social media accounts



Magazine article



TOP BOOKING SOURCES

Vacation Rental Company
56%

NEWMAN-DAILEY
RESORT PROPERTIES, INC.®


Southern
RENTALS & REAL ESTATE


DUNE ALLEN REALTY
Vacation Rentals

Directly with hotel/condo
28%

Residence
Inn®
Marriott®




hotel • dining • spa

VRBO, HomeAway
10%

 HomeAway®

 VRBO®
from HomeAway®

VacationRentals.com™
Part of the HomeAway Family

VISITOR TRANSPORTATION

- » **82%** of visitors drove to South Walton
- » **18%** who flew used the following airports:

52%

Northwest Florida Beaches
International Airport



35%

Destin-Ft. Walton Beach
Airport



6%

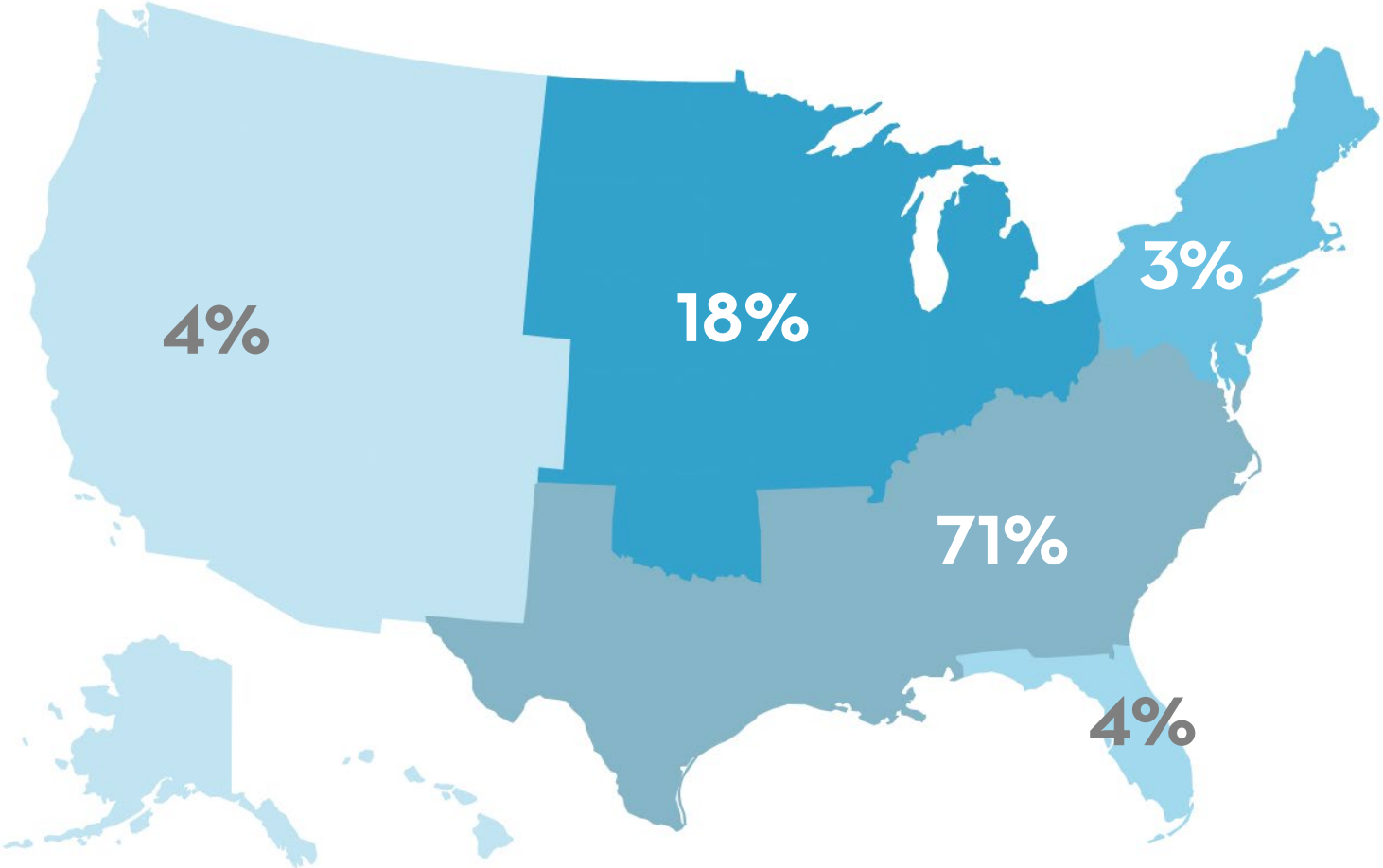
Pensacola International
Airport



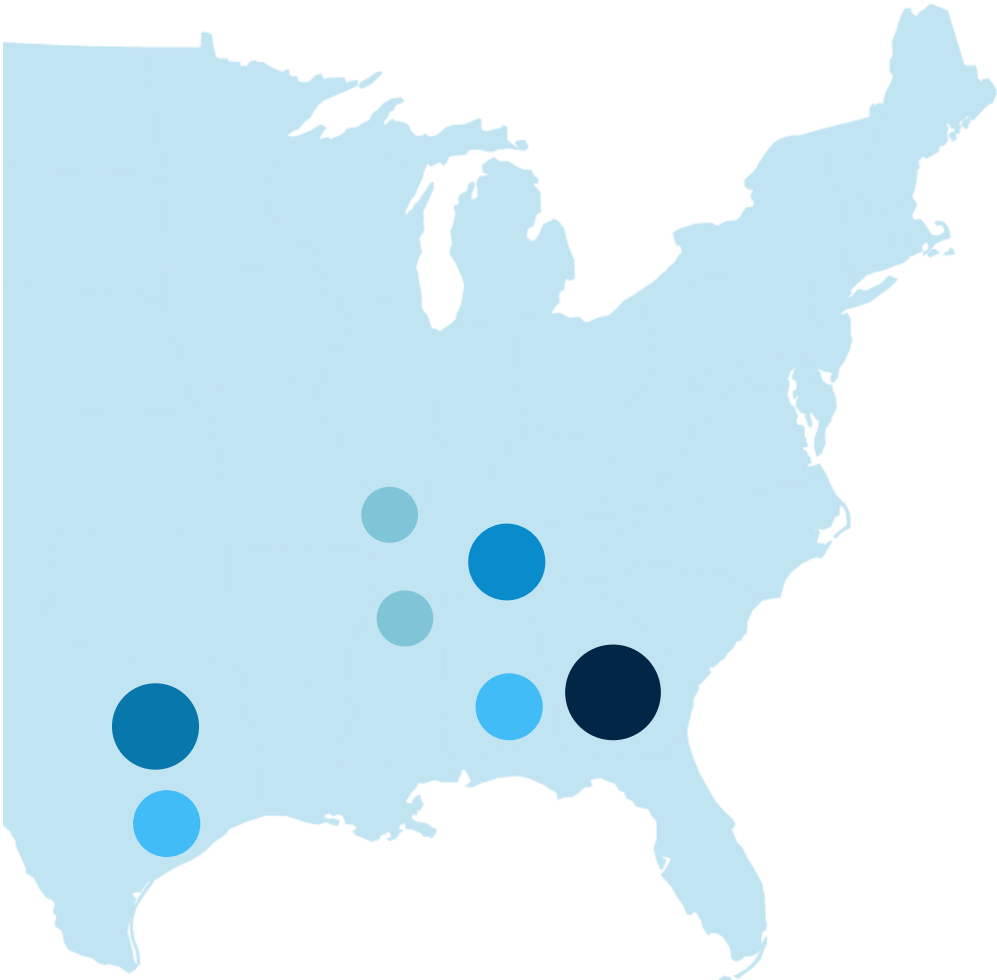
VISITOR JOURNEY: TRAVEL PARTY PROFILE



ORIGIN OF SUMMER VISITORS



ORIGIN OF SUMMER VISITORS



44% of visitors are from 7 markets.

- 14% ● Atlanta
- 7% ● Dallas - Fort Worth
- 6% ● Nashville
- 6% ● Houston
- 5% ● Birmingham
- 3% ● Saint Louis
- 3% ● Memphis

58% of visitors are from 5 states.

- 16% Georgia
- 16% Texas
- 11% Tennessee
- 10% Alabama
- 5% Louisiana

TRAVEL PARTY SIZE AND COMPOSITION

The typical visitor traveled in a party composed of **5.9** people



70% traveled with at least one person under the age of 20 in their travel party



SUMMER VISITOR PROFILE



- » The typical South Walton Summer visitor:
 - » **52** years old
 - » Female (**66%¹**)
 - » Median household income of **\$189,600**
 - » Estimated average HHI = **\$289,000**
 - » From the Southeast (**75%**)

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

VISITOR PROFILE: TYPICAL VACATIONER¹



- » The typical **Vacationer** (1 - 10 nights):
 - » **51** years old
 - » Female (**68%**²)
 - » Median household income of **\$190,000**
 - » **64%** travel with children
 - » **84%** 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:
 - » **53** years old
 - » Female (**69%**²)
 - » Median household income of **\$235,700**
 - » **72%** travel with children
 - » **75%** 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:
 - » **56** years old
 - » Female (**69%²**)
 - » Median household income of **\$183,900**
 - » **82%** travel with children
 - » **77%** 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

51% Condos, rental houses, etc.



19% Personal home/condo



12% Hotels



TOP VISITOR ACTIVITIES*

Beach **96%**



Restaurants **89%**



Relax and unwind **84%**



Family time, reading, cooking **73%**



Shopping, antiques **64%**



*Multiple responses permitted.

LENGTH OF STAY

- » Visitors spent **5.2*** nights in South Walton



*Visitors who stayed 30 or fewer nights.

FIRST-TIME AND EXPERIENCED VISITORS

- » **15%** were first-time visitors
- » **Over 1 in 3** had visited more than 10 times



TRAVEL PARTY EXPENDITURES¹

- » Travel parties spent **\$1,209** a day
- » Travel parties spent **\$7,249** on their trip



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

BEACH SAFETY

- » **95%** of Summer visitors know there are flags posted along the beaches to indicate how safe it is to go into the water
- » Over **4 in 5** Summer visitors are aware of the beach flag warning meanings
- » **47%** of Summer visitors are aware of the consequences of entering the Gulf during double red flag conditions



VISITOR JOURNEY: POST TRIP EVALUATION



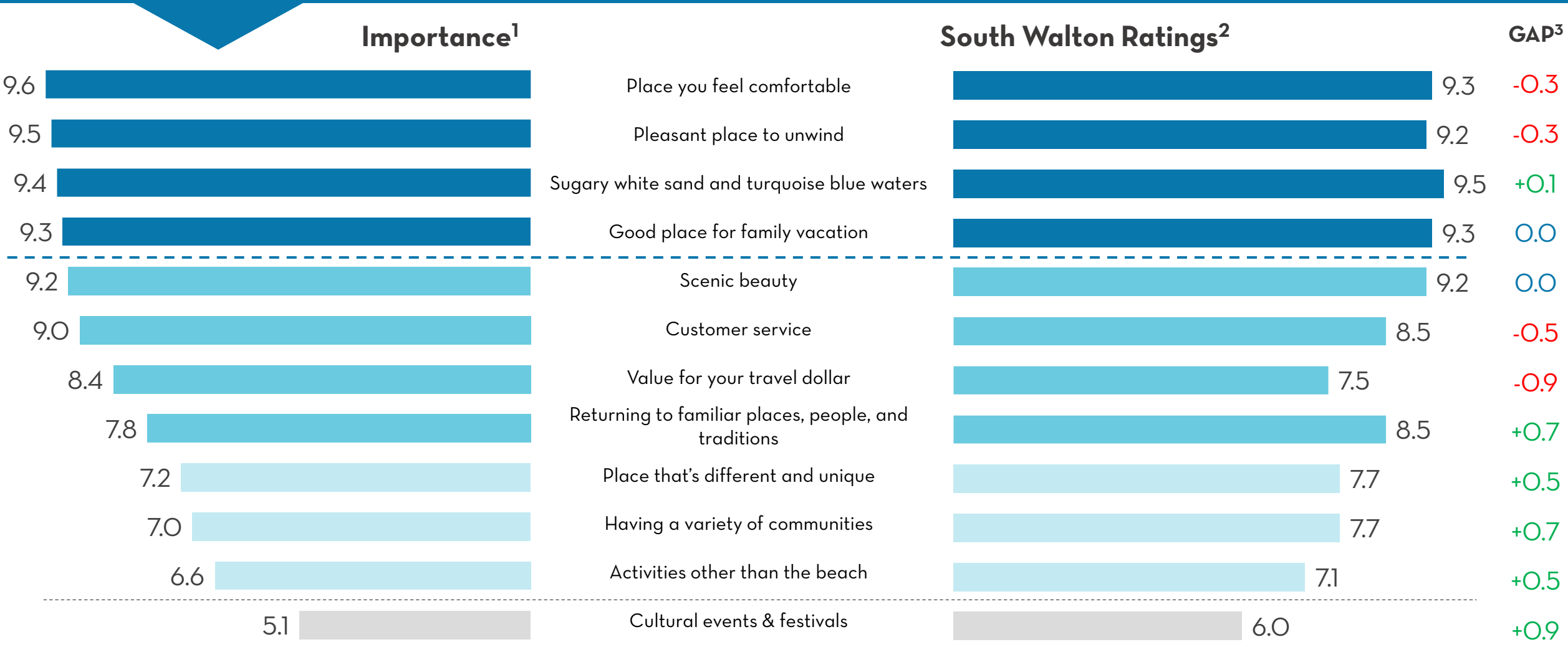
VISITOR SATISFACTION

- » Visitors gave South Walton a rating of **9.0¹** as a place to vacation
- » **94%** will return to South Walton²



¹10 = Excellent; 1= Poor
²4% of all visitors will probably not return to South Walton for the following reasons:
1. Too crowded 2. Traffic was a problem 3. Parking was a problem. 4. Too expensive.

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 9.6. Visitors rated SW as 9.3 on its ability to make them feel comfortable. Hence, the GAP is -0.3.

VISITOR DESCRIPTIONS OF SOUTH WALTON



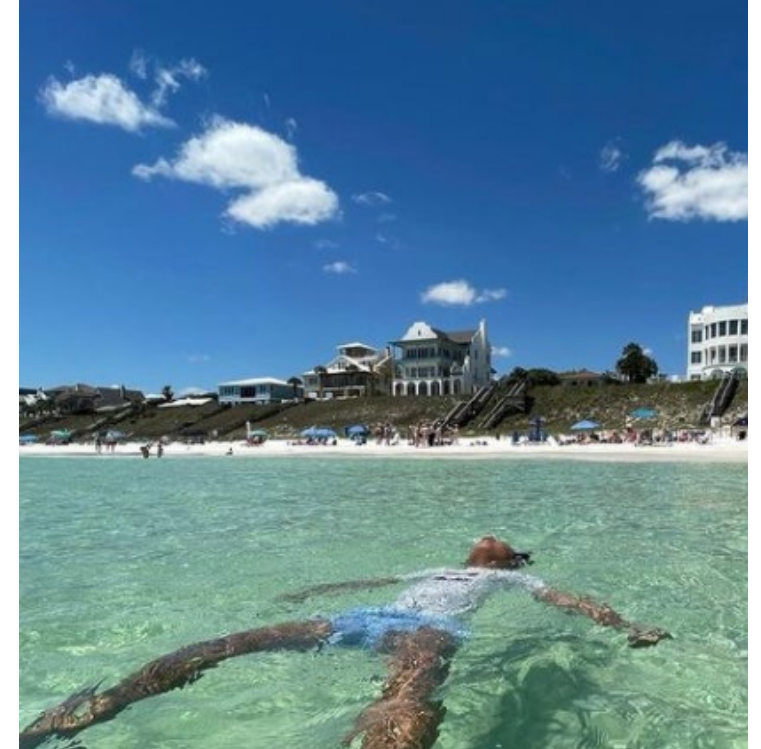
Beautiful White Sand & Clear Water (58%)

"The beach was unbelievably beautiful. The community was calm, family friendly, safe and had an upscale vibe. It backed up to a beautiful park. It was quiet and just what we were looking for."



Family Friendly (22%)

"Great family vacation spot! Great place to start family tradition. Easy to get to."



Relaxing & Stress Free (21%)

"The perfect relaxation zone! Beautiful beaches... everything I ever want on a beach vacation. No other beaches compare."

YEARLY COMPARISONS

VISITOR PROFILE - SUMMER 2020 VS. 2021

Visitor Metrics	Summer 2020	Summer 2021
Travel party	5.0	5.9
Kids <20	65%	70%
Median age	51	52
Estimated median household income	\$178,000	\$189,600
Stayed in condo/rental house	68%	51%
Drove	86%	82%
Nights spent	6.2	5.2
Direct expenditures (travel party for entire trip) ¹	\$6,441	\$7,249
1 st time visitor	10%	15%
10+ visits to South Walton	39%	35%

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

VISITOR PROFILE - SUMMER 2020 VS. 2021

Top Origin States	Summer 2020	Summer 2021
Georgia	25%	16%
Texas	12%	16%
Tennessee	9%	11%
Alabama	16%	10%
Florida	8%	4%
Origins - Regions	Summer 2020	Summer 2021
Southeast	86%	75%
Midwest	10%	18%
Northeast	1%	3%
West	3%	4%
International	0%	0%

VISITOR PROFILE - SUMMER 2020 VS. 2021

Top Visitor Activities	Summer 2020	Summer 2021
Beach	94%	96%
Restaurants	86%	89%
Relax and unwind	77%	84%
Family time, reading, cooking	66%	73%
Shopping, antiques	54%	64%
Biking, running	42%	45%
Water sports	26%	29%
Bars, nightclubs	28%	24%
Golf or tennis	13%	16%
State parks	18%	15%
Attractions	13%	15%
Special events	15%	13%
Hiking, nature walks, eco tours	42%	13%
Dune lakes	4%	9%
Art galleries, museums, cultural events	15%	8%
Spas	5%	7%
Business meetings, conferences	2%	1%
Other	4%	3%

VISITOR PROFILE - SUMMER 2020 VS. 2021

Visitor Metrics	Summer 2020	Summer 2021
Will return to South Walton	96%	94%
Rating for overall experience ¹	9.0 ¹	9.0 ¹
Viewed Visitors Guide ²	32%	22% ²
Planned trip 6+ months out	31%	37%
Used VisitSouthWalton.com	25%	18%
Used 1 of 16 beaches' websites	29%	26%
Use the term "South Walton"	32%	21%

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

²18% used the online version & 6% used the print version.

DETAILED FINDINGS



VISITOR JOURNEY: PRE-VISIT



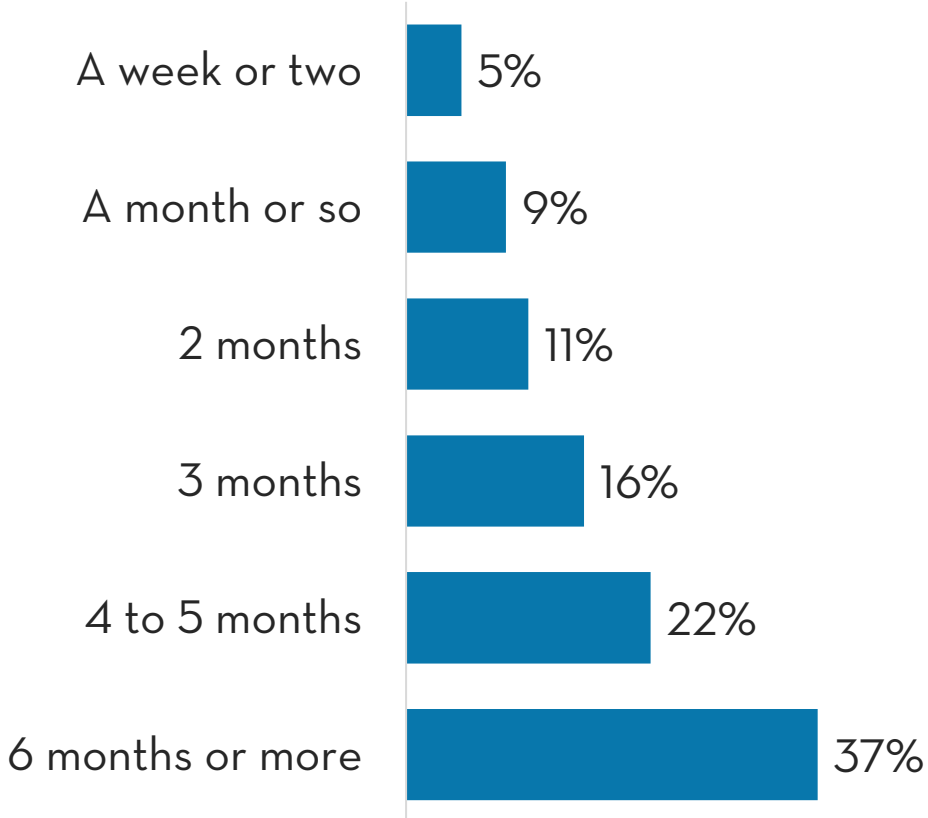
PLANNING CYCLE



About 3 in 4 visitors plan a Summer South Walton vacation at least **3 months out**.



Only 1 in 7 visitors to South Walton have **a short (a month or less) planning cycle**



OTHER DESTINATIONS CONSIDERED



Over **half** of Summer visitors only considered 1 of the South Walton Beaches.



21% use the term “South Walton” when referring to the area.

Only considered 1 of the South Walton beaches

54%

Considered another 1 of the 16 South Walton beaches

35%

Considered vacationing outside of South Walton, but in FL

8%

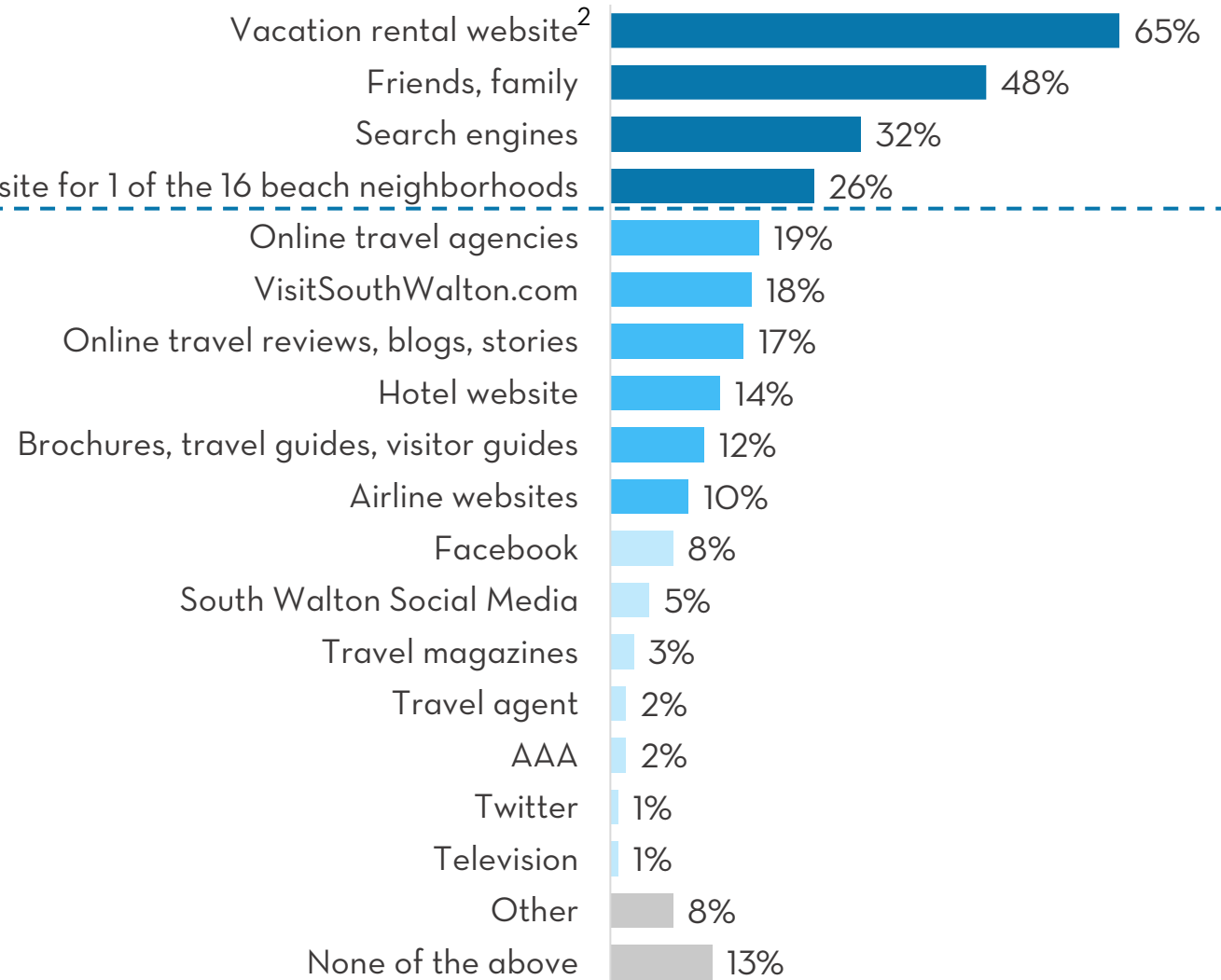
Considered vacationing at a beach outside of FL

3%

TRIP PLANNING SOURCES¹

Nearly 2 in 3 visitors used a vacation rental website to help plan their trip to South Walton.

Nearly half of visitors asked their friends and family for advice to help plan their trip to South Walton.



¹Multiple responses permitted.

²This option not available in previous seasons.

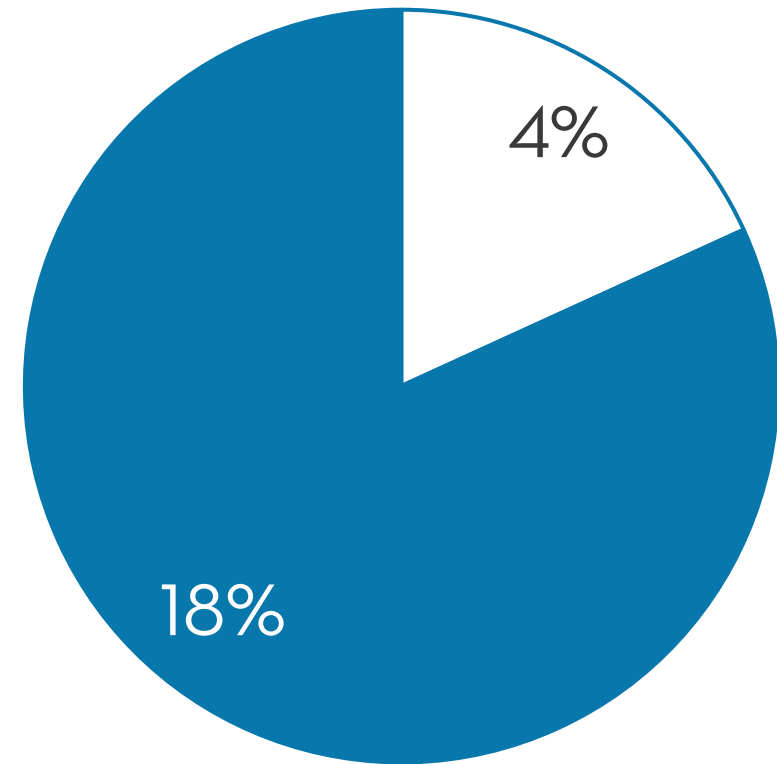
SOUTH WALTON VISITOR GUIDE



Nearly 1 in 4 visitors viewed a South Walton Visitors Guide before going to South Walton.



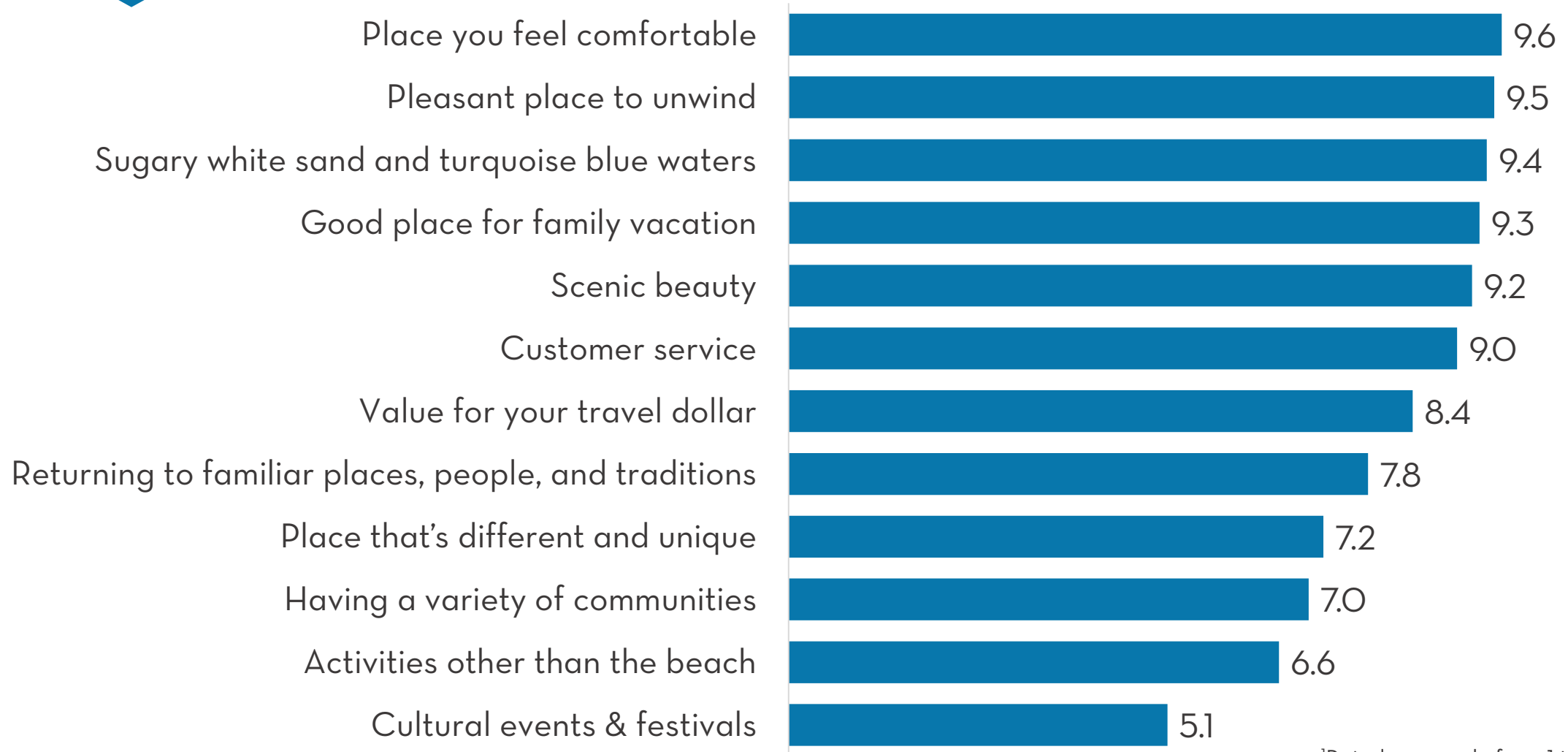
Visitors Guide received a rating of **7.4 out of 10¹**.



□ Print version ■ Online version

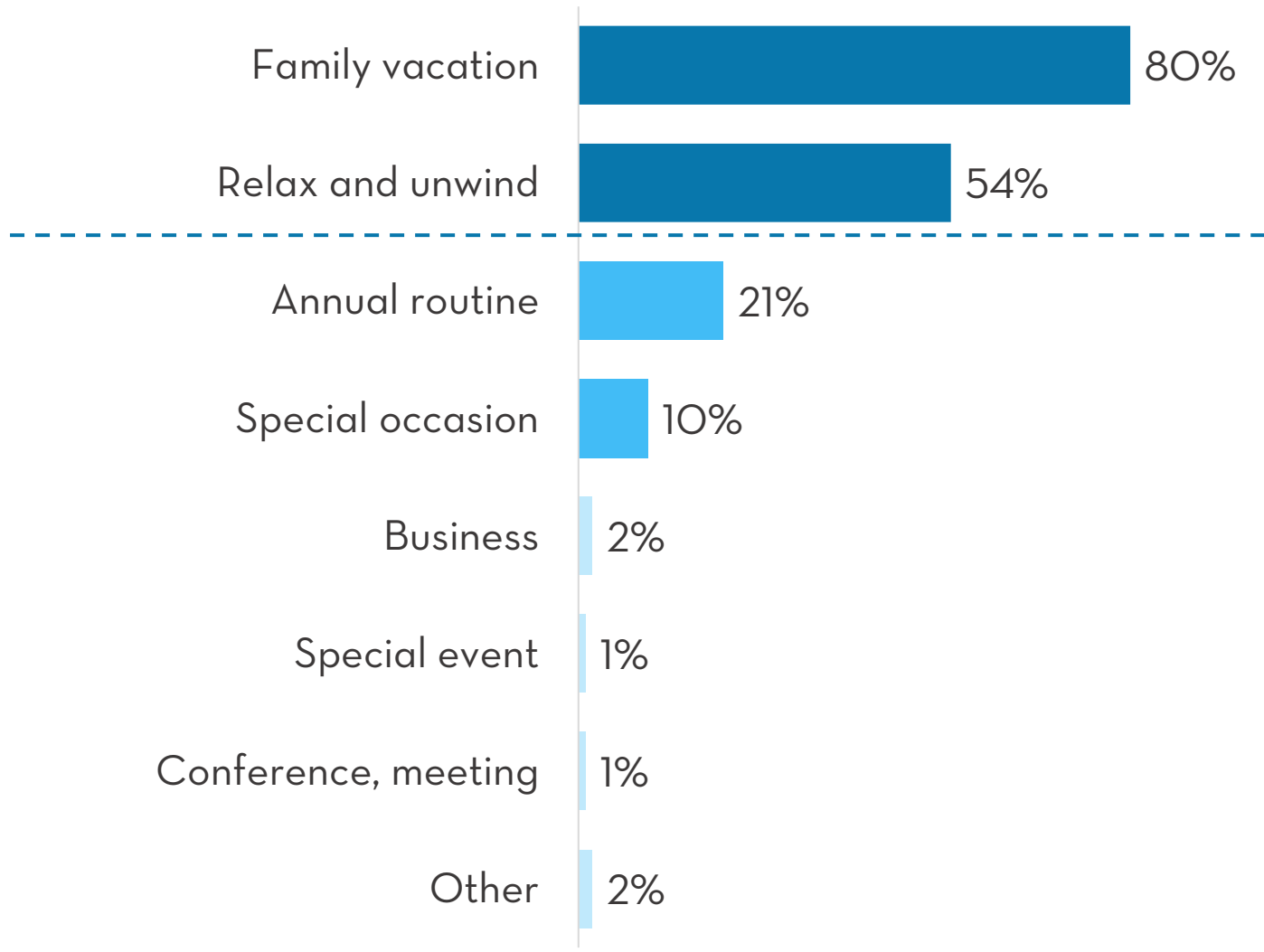
¹Rated on a 10-point scale where 10 is extremely useful and 1 is not at all useful.

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



50

¹Multiple responses permitted.

SOUTH WALTON PROMOTIONS¹

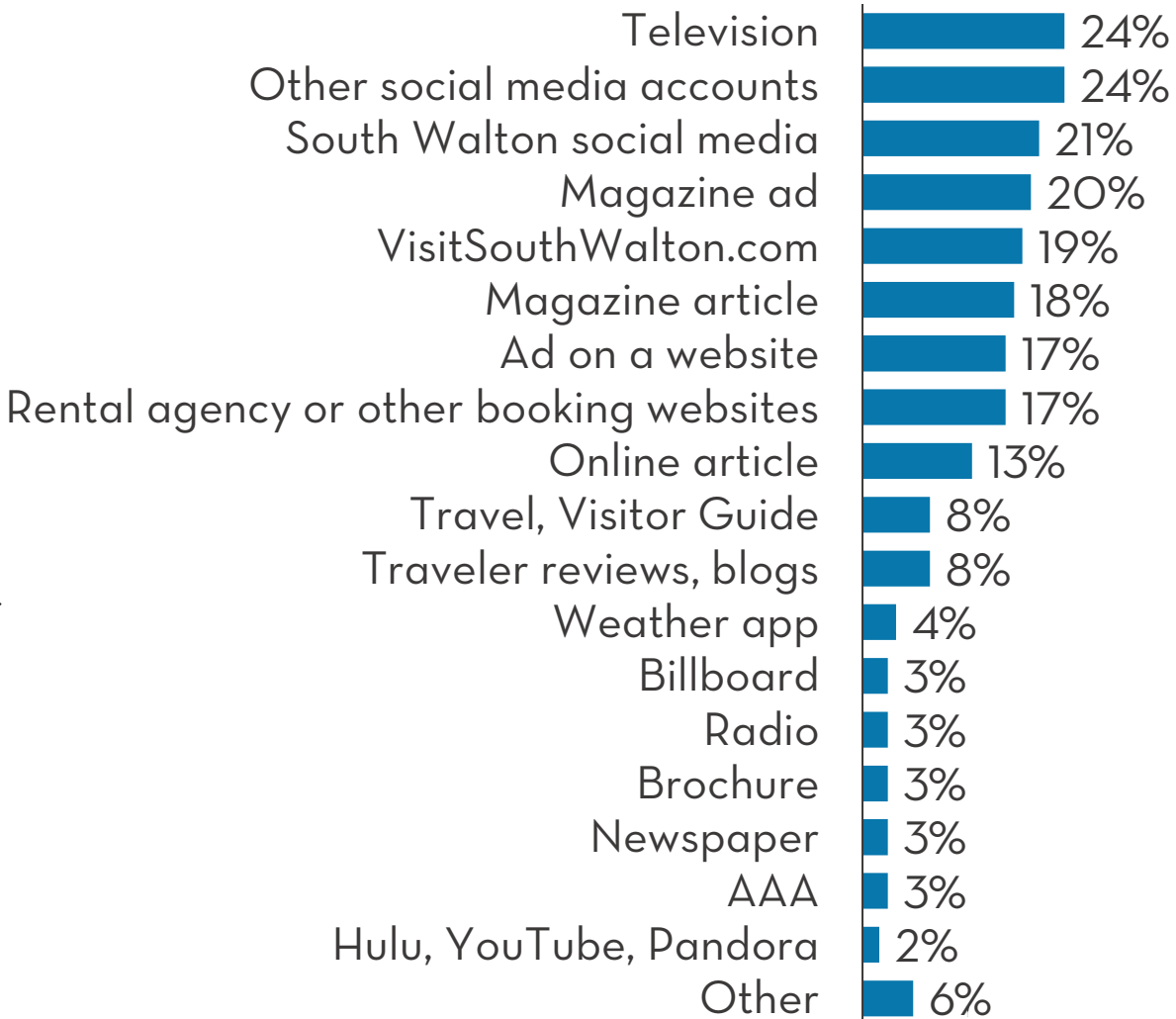


31% of Summer visitors have recently seen, read or heard advertising, promotions or travel stories about South Walton.



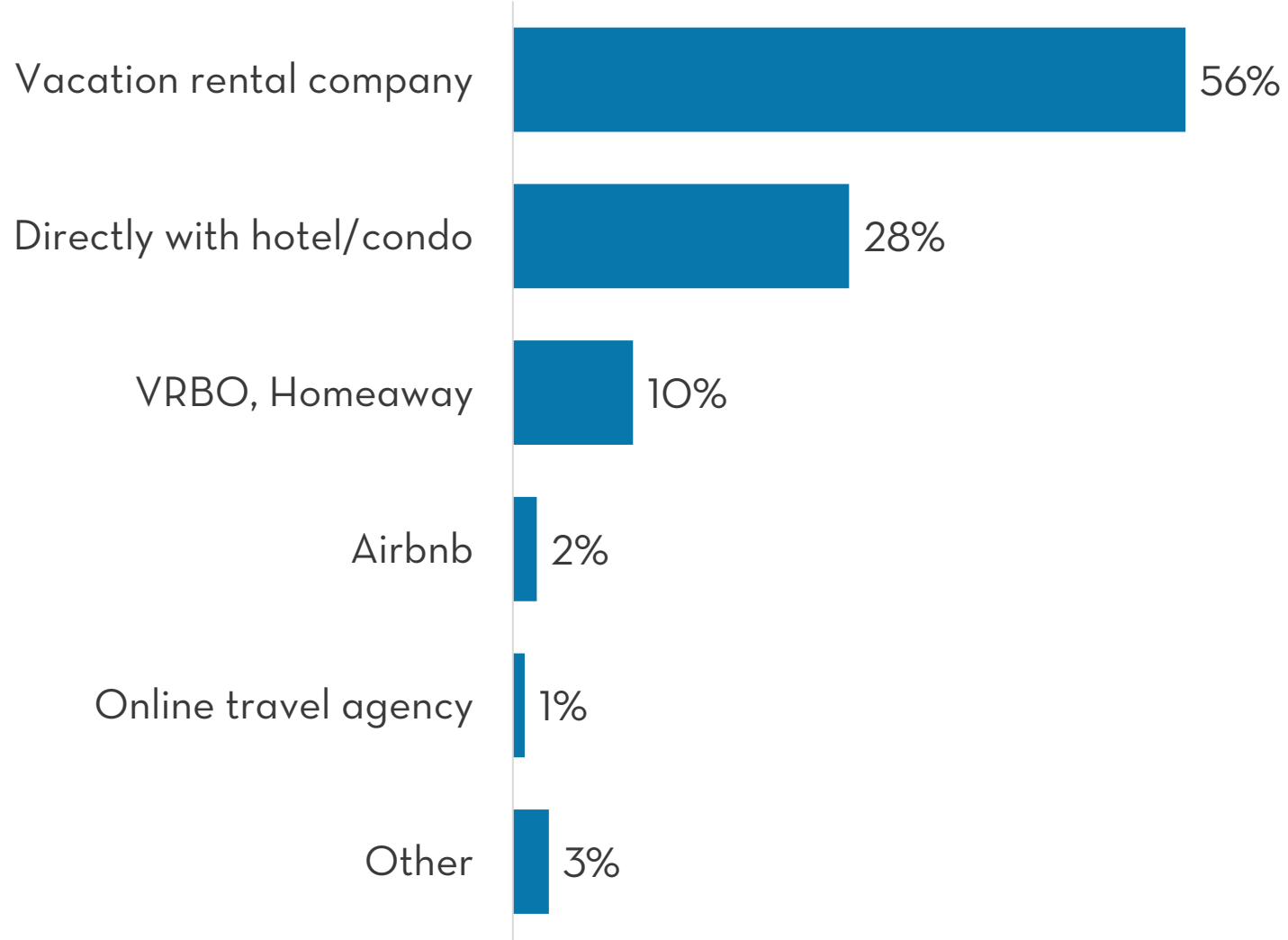
This information influenced **9%** of all visitors to visit South Walton.

Base: **31%** of visitors who noticed advertising




¹Multiple responses permitted.


BOOKING ACCOMMODATIONS



VISITOR TRANSPORTATION

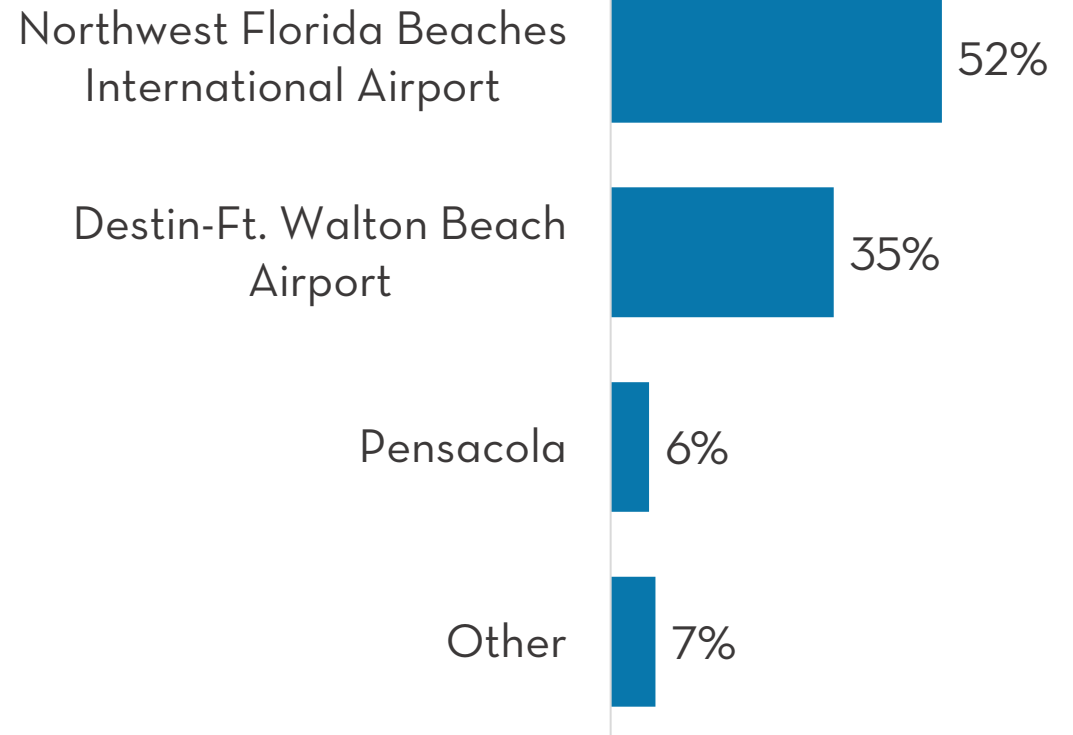


82% of Summer visitors drove to South Walton.



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

18% who **flew** used the following airports:

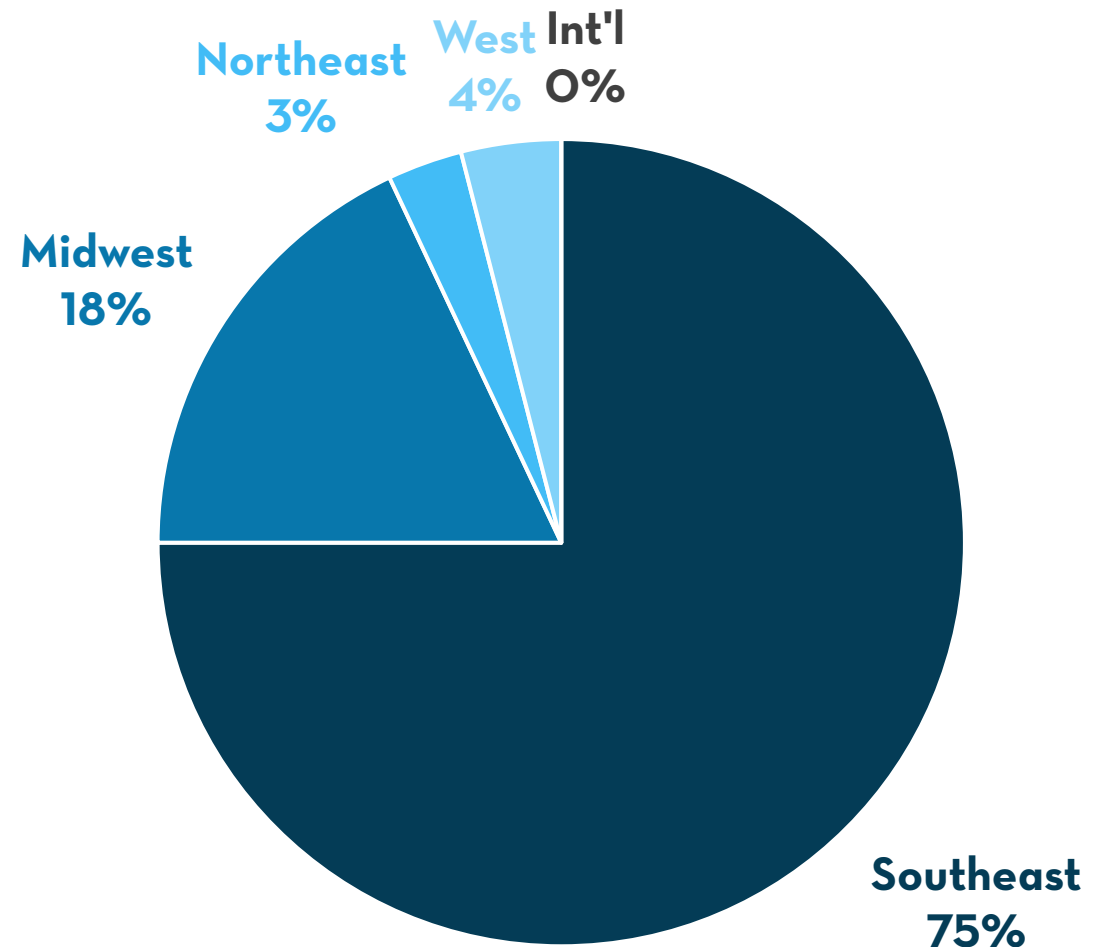


VISITOR JOURNEY: TRAVEL PARTY PROFILE



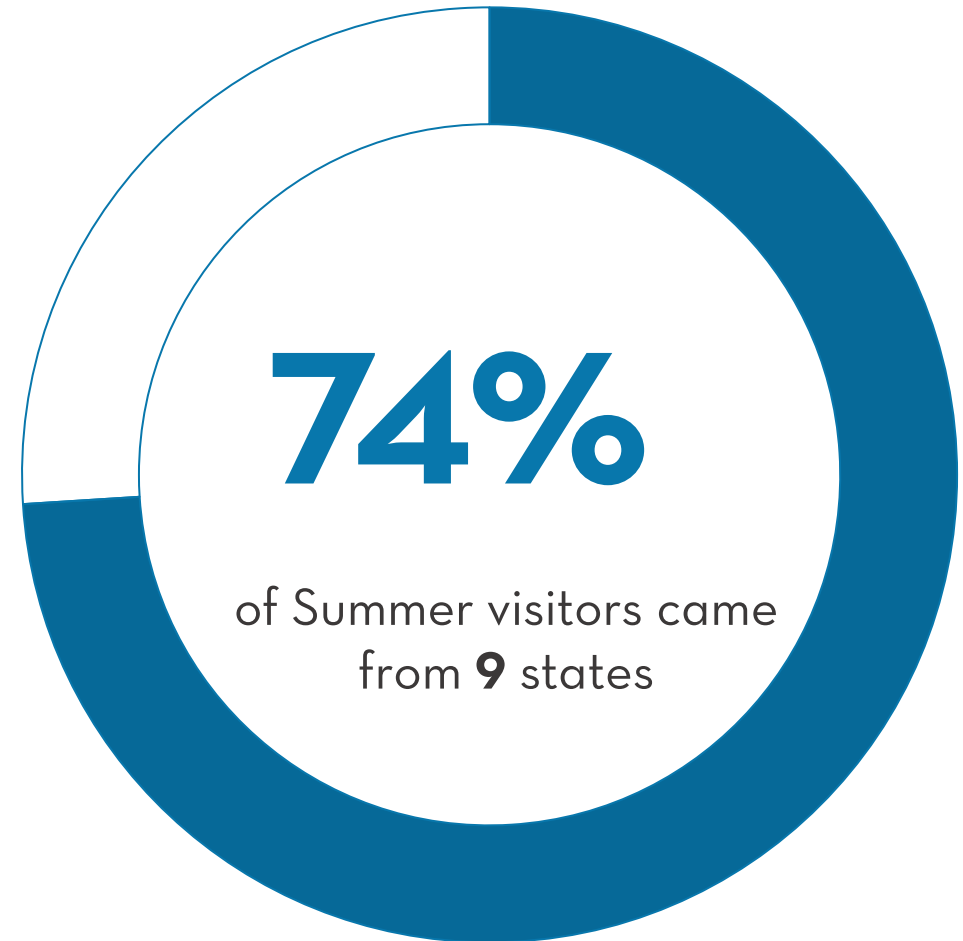
ORIGIN OF SUMMER VISITORS

Top Origin Markets	% of Visitors
Atlanta	14%
Dallas - Fort Worth	7%
Nashville	6%
Houston	6%
Birmingham	5%
Saint Louis	3%
Memphis	3%
Pensacola - Mobile	3%
New Orleans	2%
Little Rock	2%
Jackson, MS	2%
Cincinnati	2%
Kansas City	2%



ORIGIN OF SUMMER VISITORS

State	% of Visitors
Georgia	16%
Texas	16%
Tennessee	11%
Alabama	10%
Louisiana	5%
Missouri	4%
Arkansas	4%
Florida	4%
Mississippi	4%



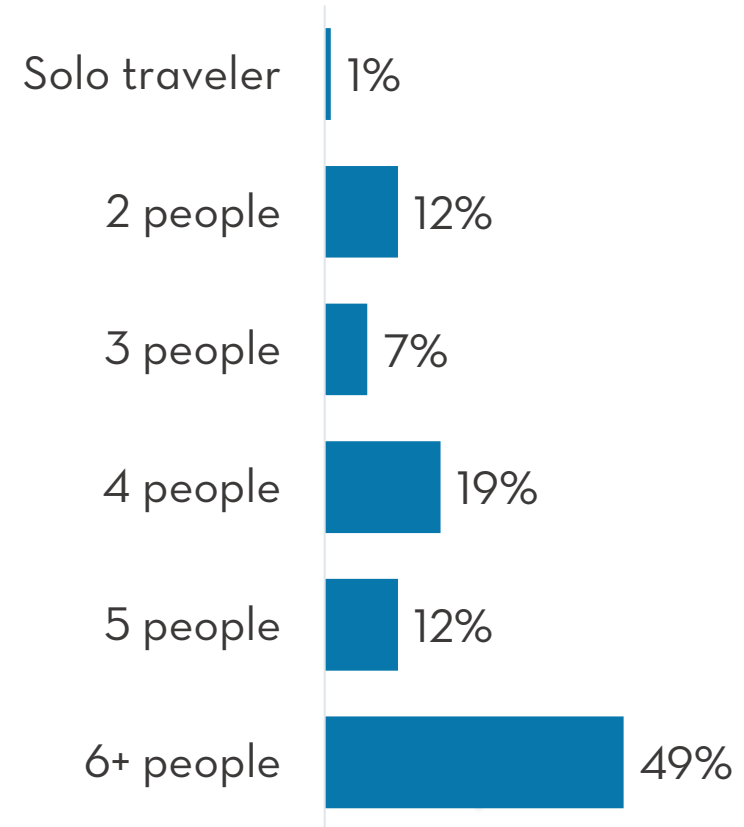
TRAVEL PARTY SIZE AND COMPOSITION



Visitors traveled in a party composed of **5.9** people.



70% of visitors traveled with children under the age of 20.

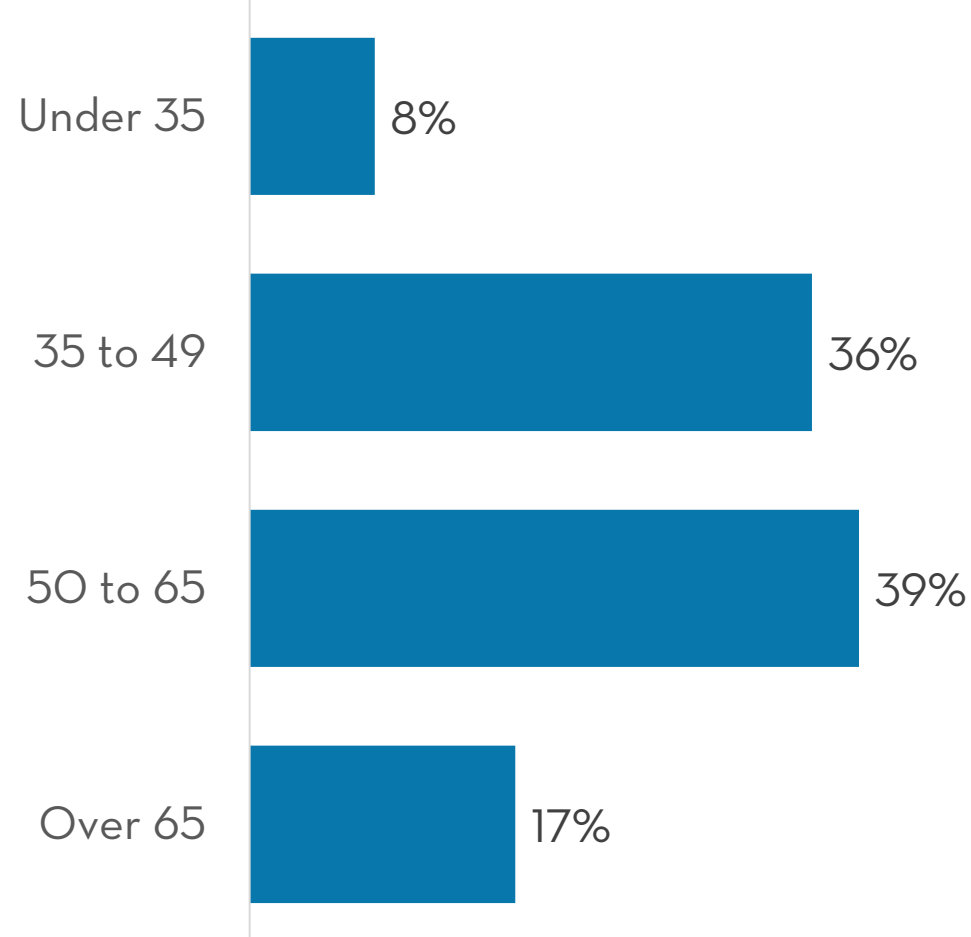


¹Multiple responses permitted.

AGE OF SUMMER VISITORS

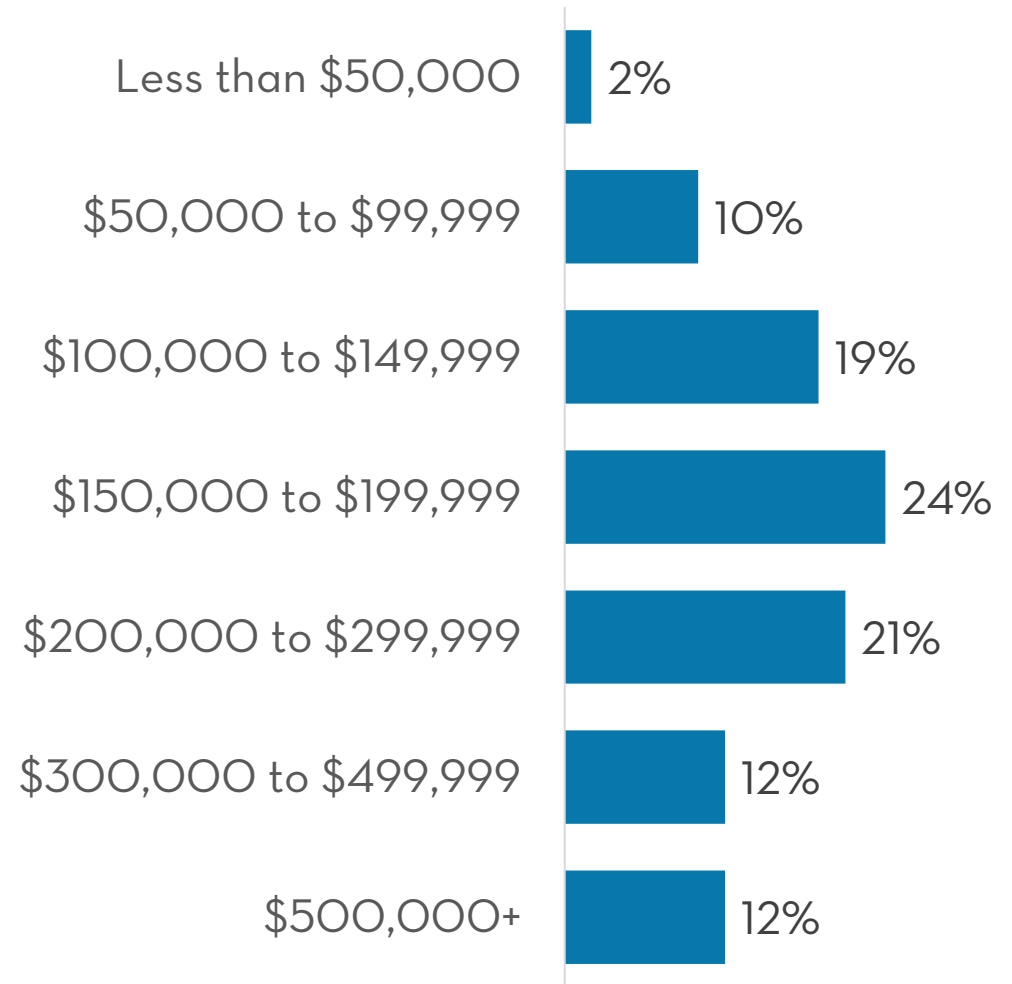


Median age of Summer visitors was **52 years old.**

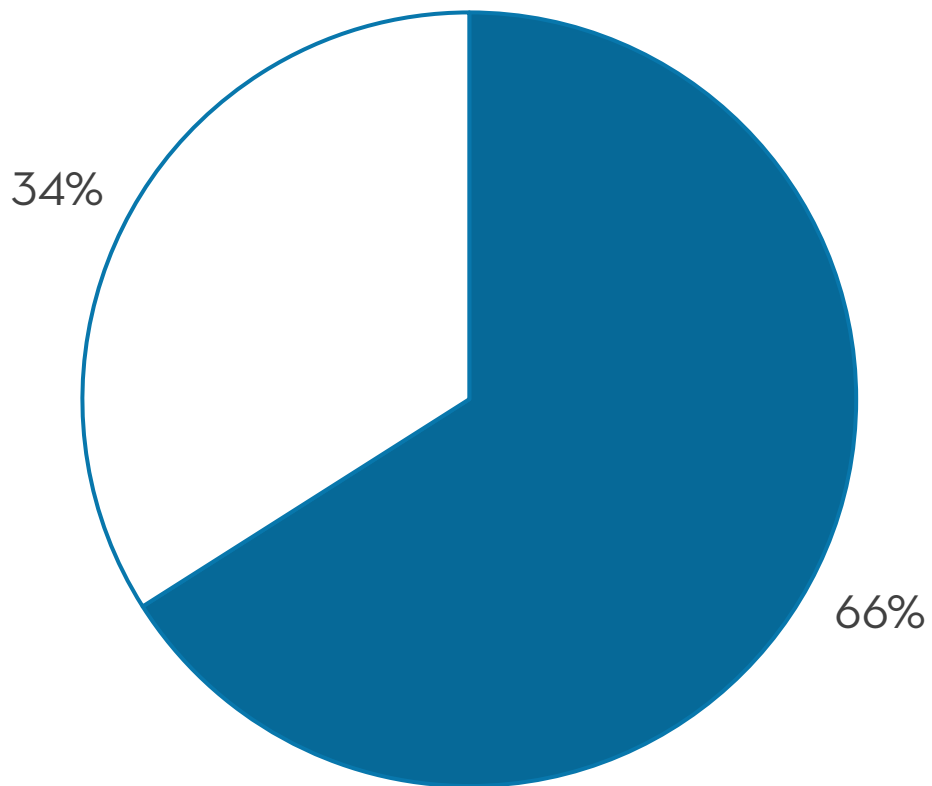


TOTAL HOUSEHOLD INCOME IN 2020

Summer visitors had a **median** household income of **\$189,600**, while estimated **average** household income was **\$289,000**.



GENDER



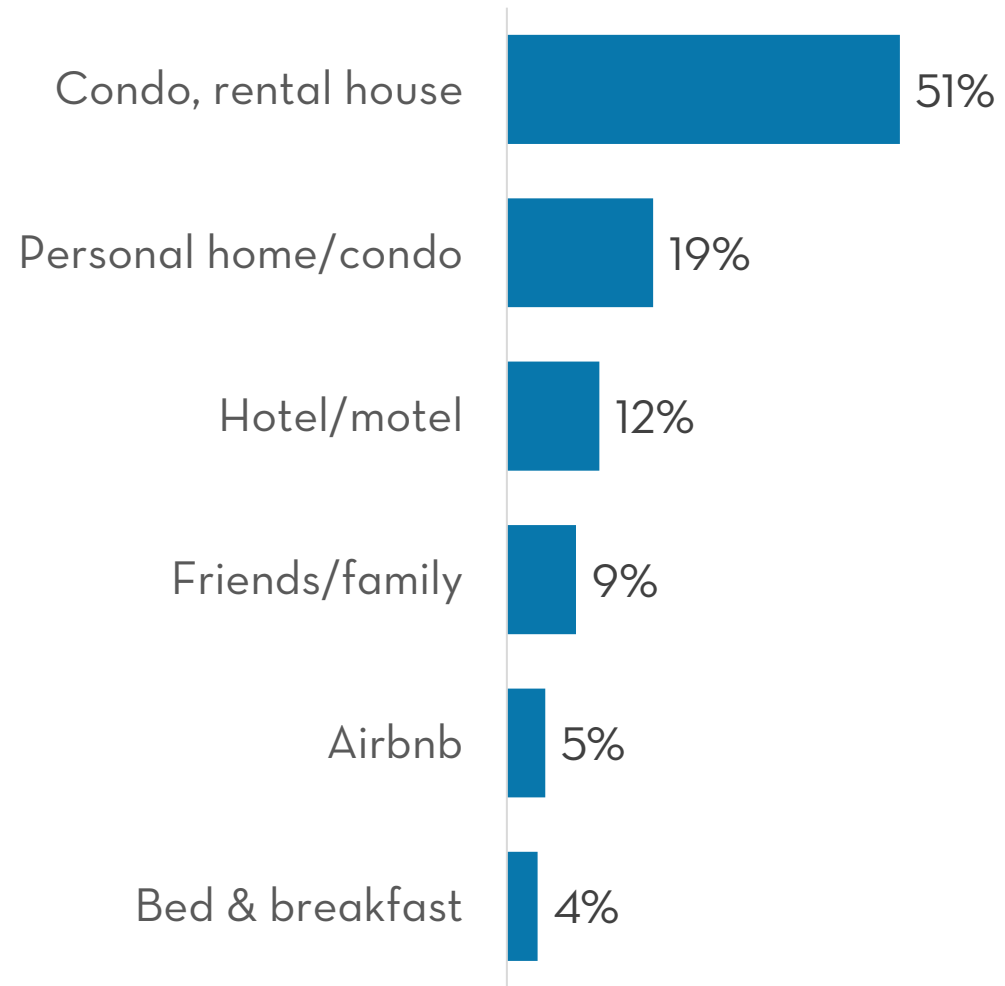
■ Female □ Male

Responses impacted by person more willing to be interviewed

VISITOR JOURNEY: TRIP EXPERIENCE



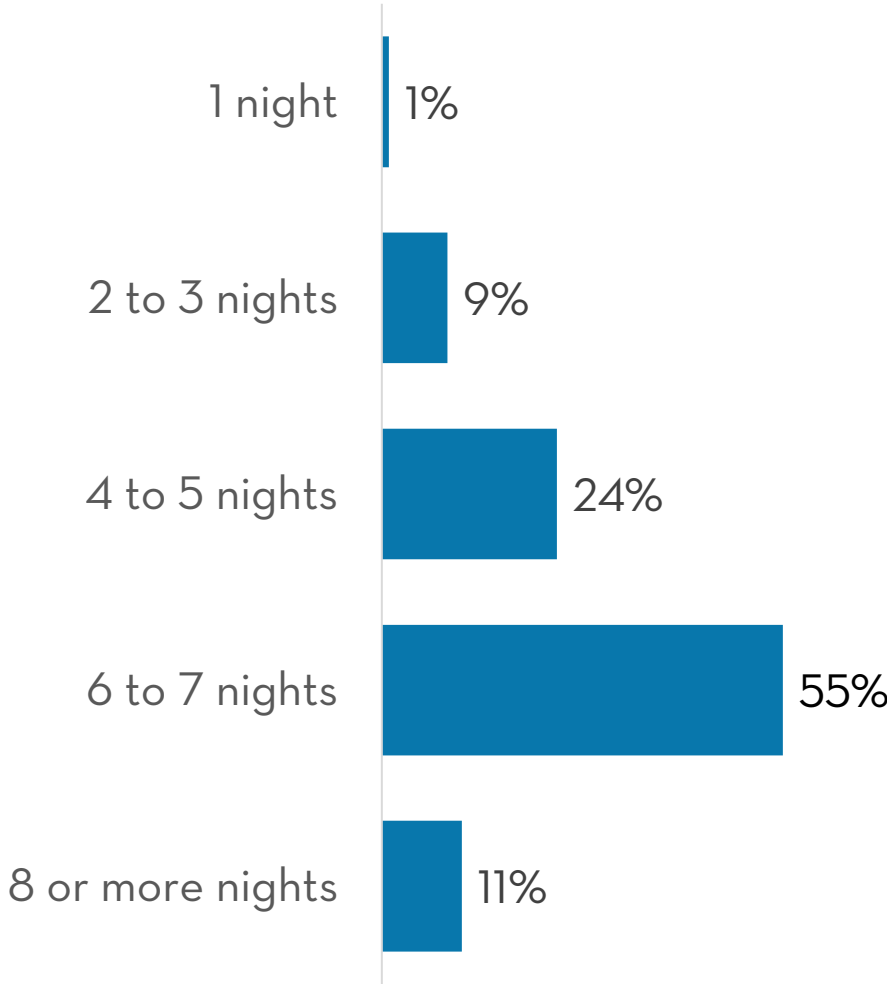
VISITOR'S PAID ACCOMMODATIONS



LENGTH OF STAY



Summer visitors¹ spent an average of **5.2** nights in South Walton.

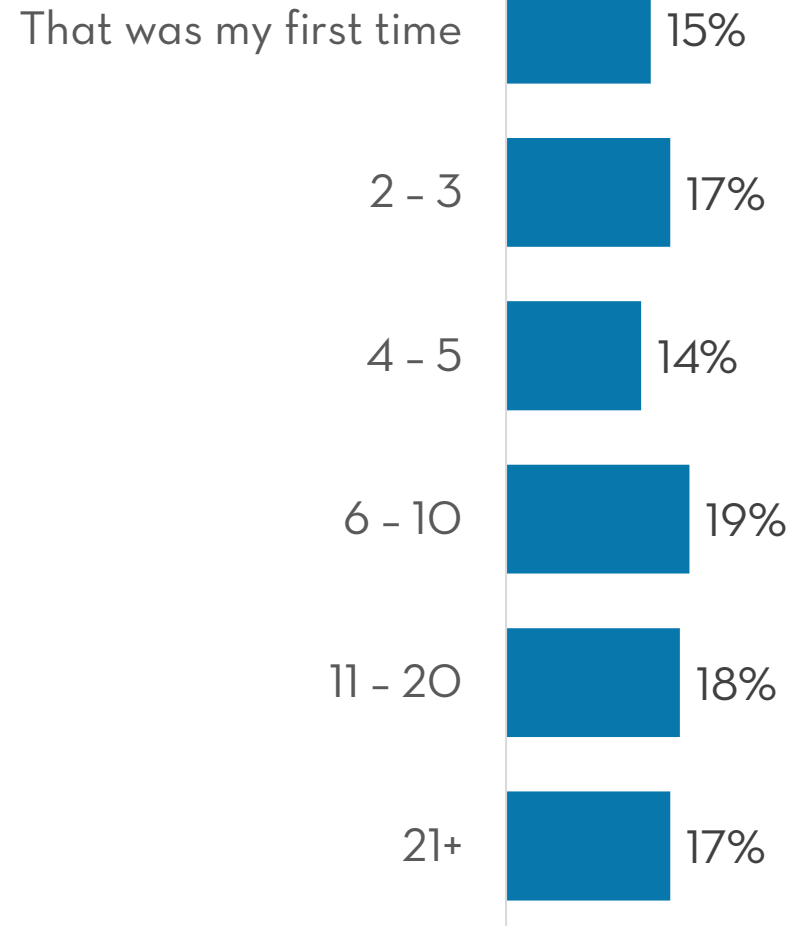


¹ Visitors who stayed in South Walton up to 30 nights.

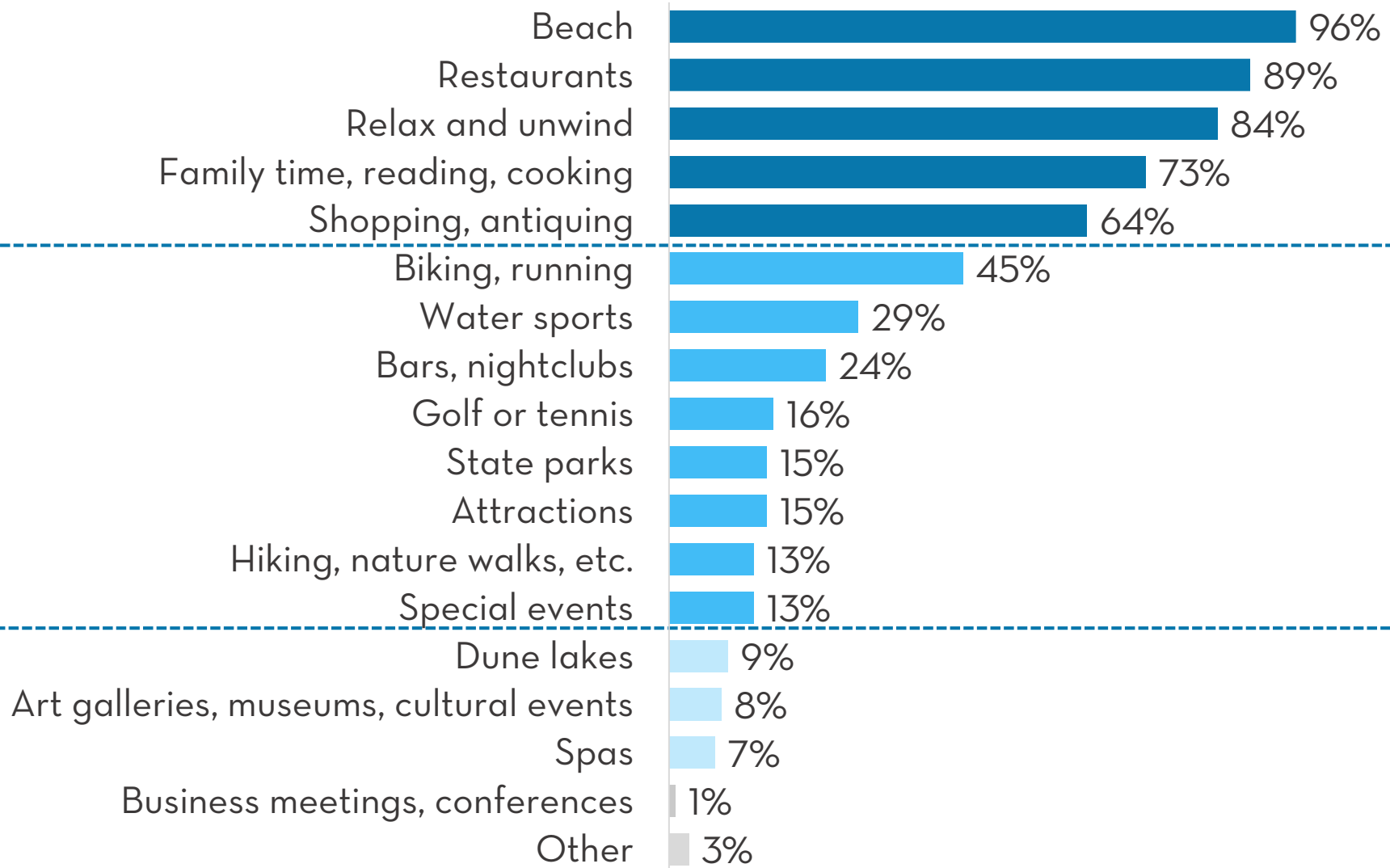
NUMBER OF VISITS TO SOUTH WALTON

15% of Summer visitors were visiting for the first time.

Over 1 in 3 Summer visitors have visited South Walton more than 10 times.



VISITOR ACTIVITIES¹

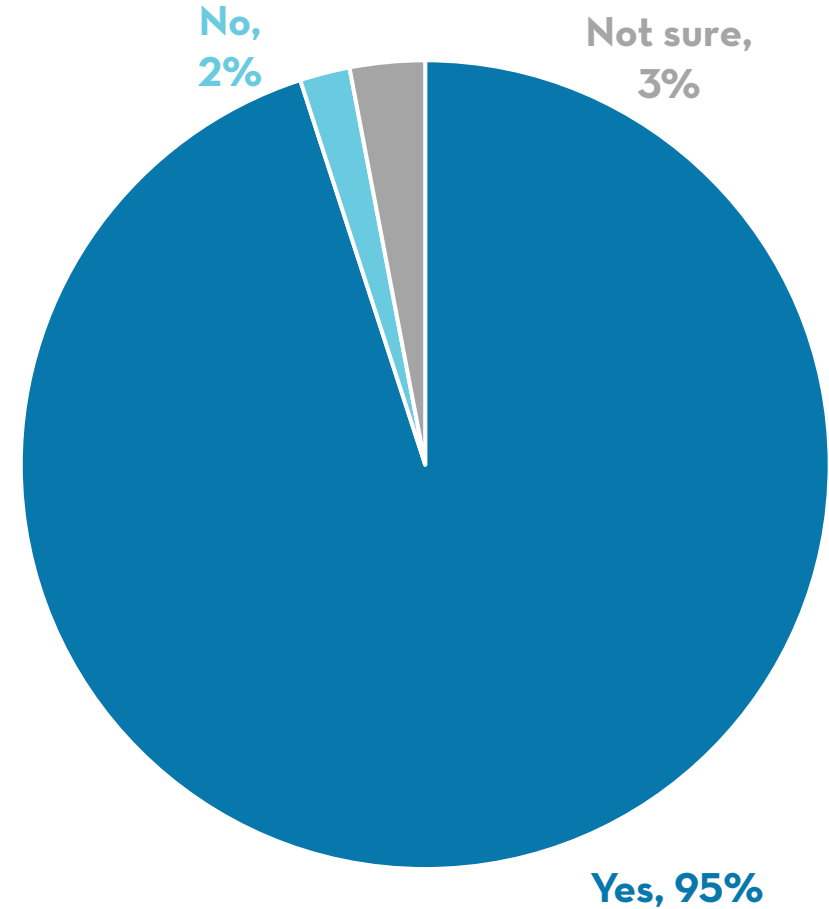


¹Multiple responses permitted.

BEACH SAFETY



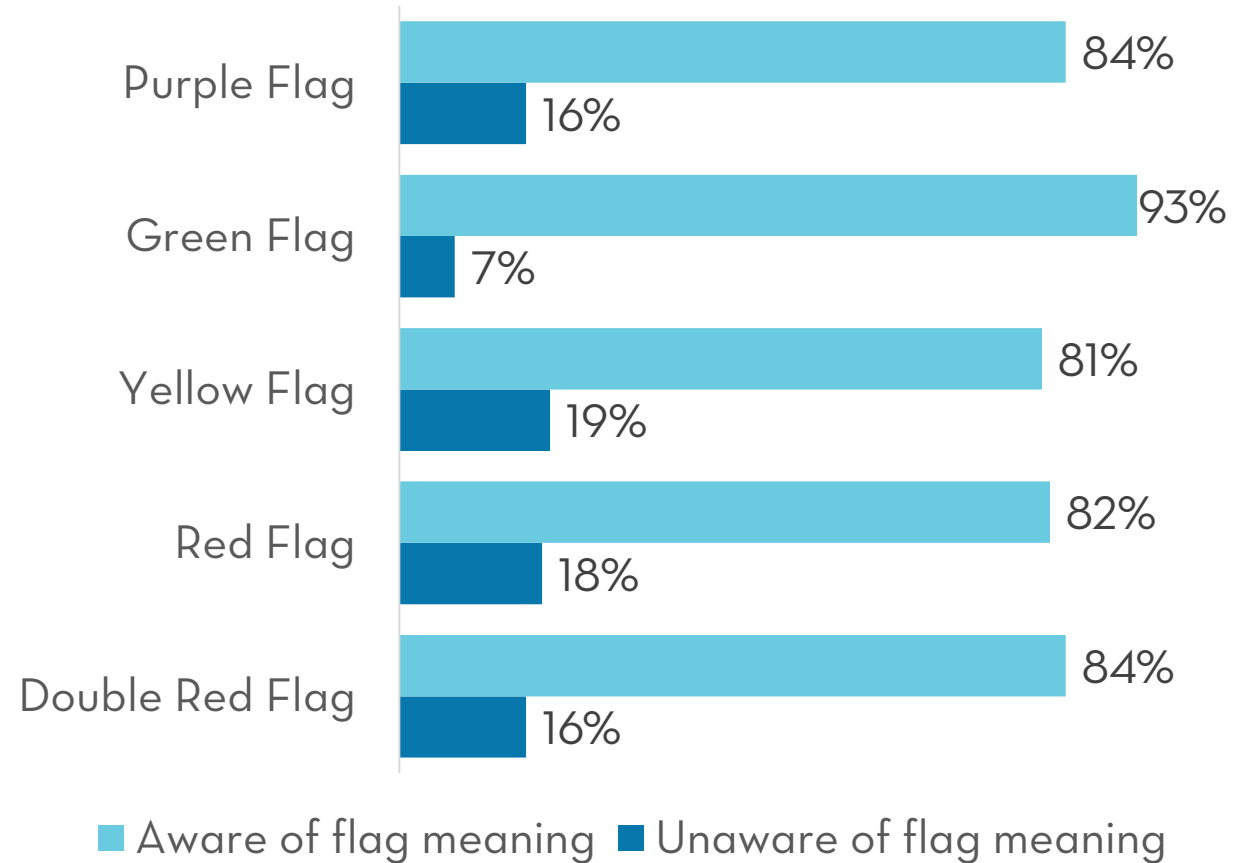
95% of Summer visitors know there are flags posted along the beaches to indicate how safe it is to go into the water



BEACH FLAG AWARENESS

Over 8 in 10 visitors are aware of the meaning of each flag color

47% of Summer 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	\$610 ²	\$3,657
Restaurants	\$179	\$1,071
Groceries	\$73	\$435
Shopping	\$168	\$1,008
Entertainment	\$81	\$487
Transportation	\$67	\$403
Other	\$31	\$188
Total	\$1,209	\$7,249

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

² Higher than ADR since properties charge for parking, resort feeds, etc.

VISITOR JOURNEY: POST-TRIP EVALUATION



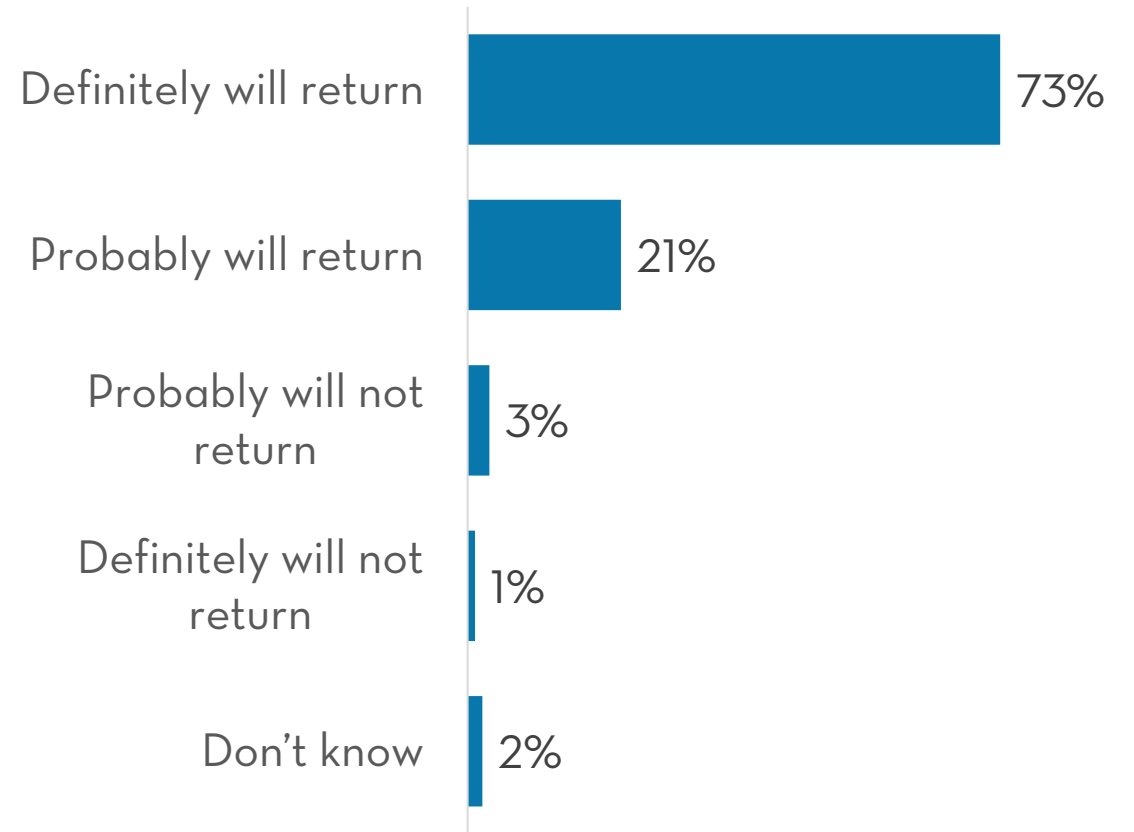
SATISFACTION WITH SOUTH WALTON



Visitors gave South Walton a rating of **9.0**¹ as a place to vacation.



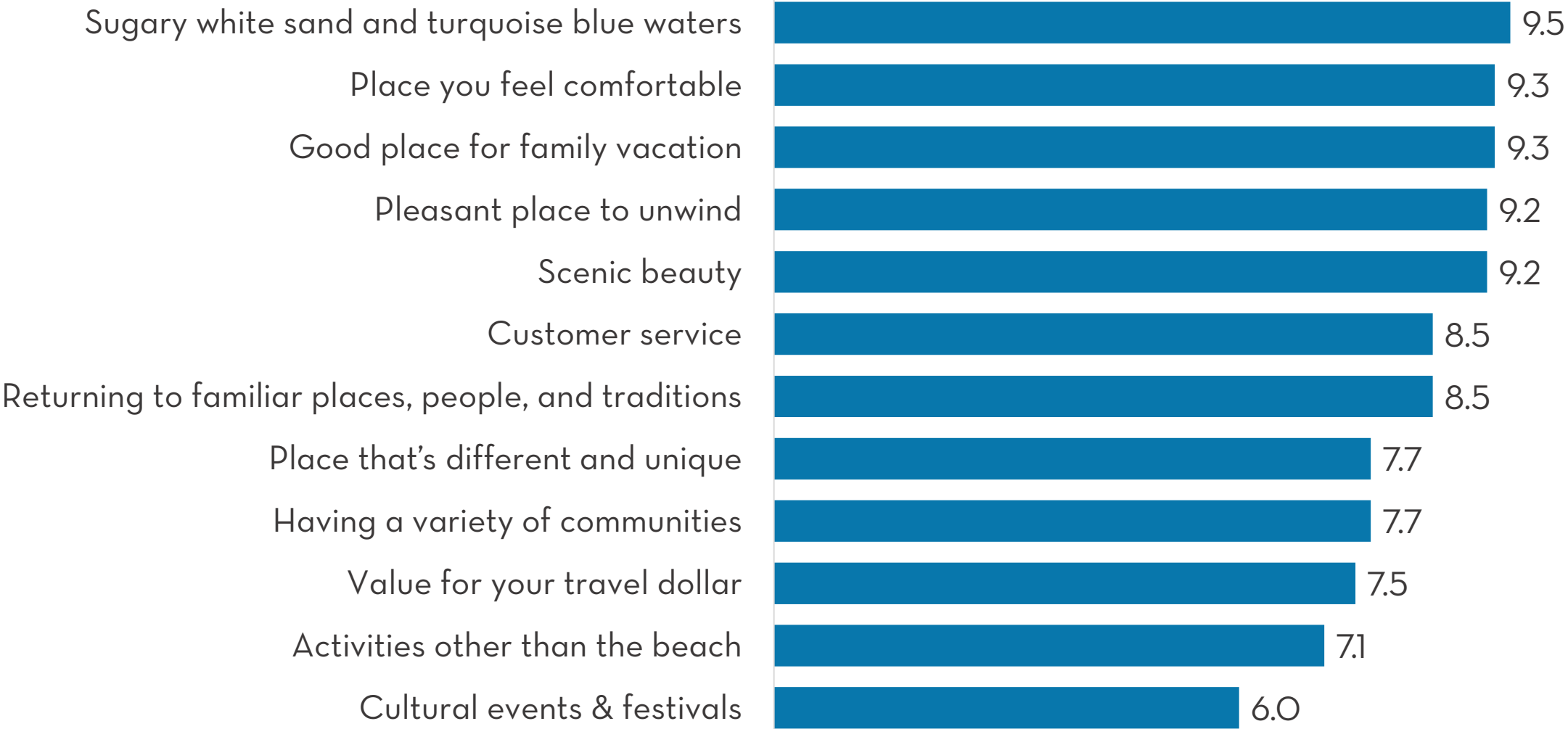
94% will return to South Walton.²



¹10 = Excellent; 1= Poor

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

- » Summer visitors to South Walton continue to enjoy the beautiful beach, soft white sand, and clear blue water, yet they also noted that expansive crowds had affected their vacation experience more than in previous years
- » “Overcrowded” as a descriptor increased to 19% this year from 11% last summer



¹ Coded verbatim responses. Multiple responses permitted.

AREA DESCRIPTIONS*



Beautiful Beaches/White Sand/Clear Water

“The beach was unbelievably beautiful. The community was calm, family friendly, safe and had an upscale vibe. It backed up to a beautiful park. It was quiet and just what we were looking for.”

Beautiful Beaches/White Sand/Clear Water

“Beautiful community that feels safe with wonderful beaches and the nicest people!”

Beautiful Beaches/White Sand/Clear Water

“Breathtakingly beautiful beaches; charming, family-friendly communities that offer something for a range of generations. Beaches (at least in Rosemary) are private and not overcrowded which improves the overall experience.”

*Coded open-ended responses.
Multiple responses permitted.

AREA DESCRIPTIONS*



Family Friendly

“Gorgeous and very family friendly. Rent a jeep and have fun!”

Family Friendly

“Wonderful beach family vacation! Best place ever! We have been coming here for 14 years! Wish everyone didn't find out how wonderful it is.”

Family Friendly

“Great family vacation spot! Great place to start family tradition. Easy to get to.”

*Coded open-ended responses.
Multiple responses permitted.

AREA DESCRIPTIONS*



Relaxing & Stress Free

“Beautiful beaches that provide the perfect environment to relax and connect with family and friends.”

Relaxing & Stress Free

“Quiet beach towns with beautiful white sand beaches and lots of cool places to eat and sleep.”

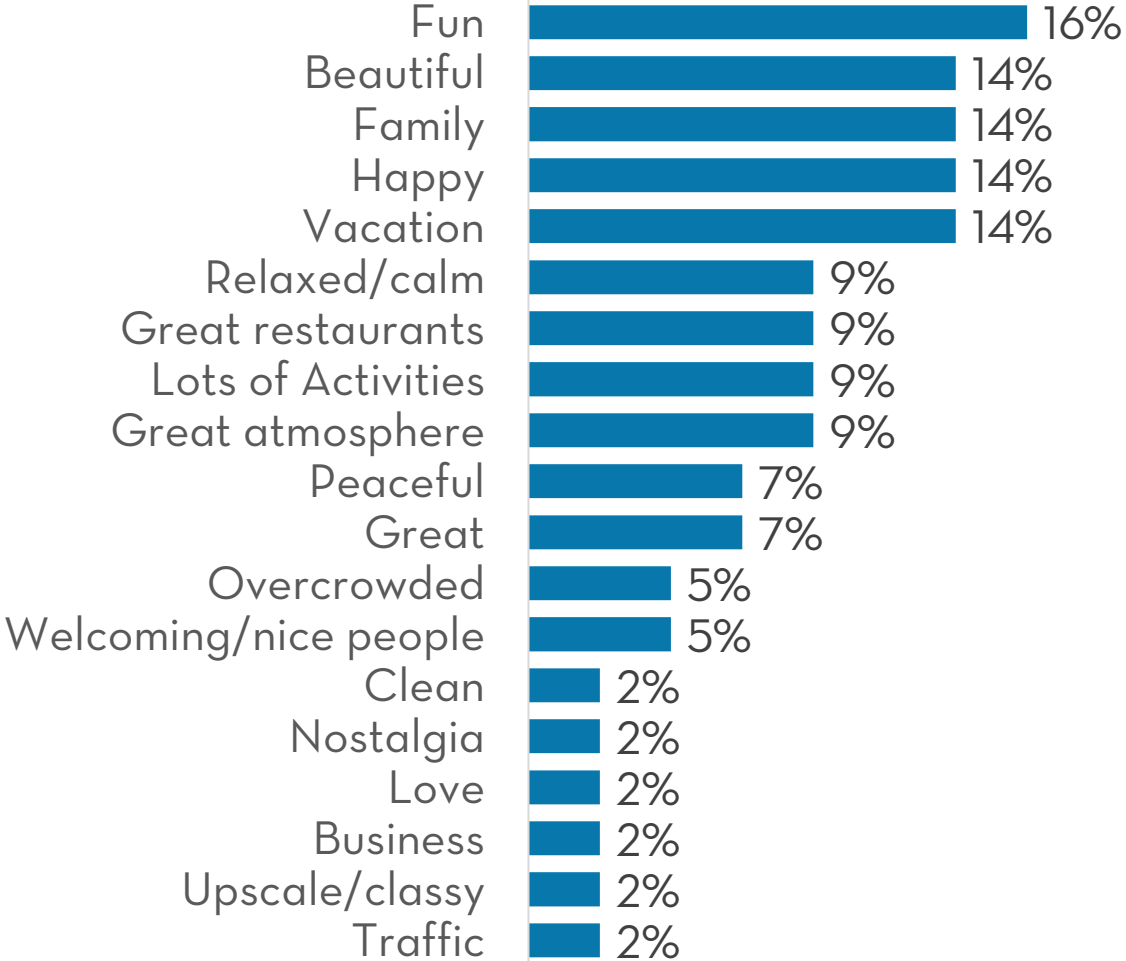
Relaxing & Stress Free

“The perfect relaxation zone! Beautiful beaches... everything I ever want on a beach vacation. No other beaches compare.”

*Coded open-ended responses.
Multiple responses permitted.

EMOTIONS ASSOCIATED WITH SOUTH WALTON¹

- » The “feeling of fun” increased +13% points from Summer 2020, perhaps because visitors have learned to deal with the presence of COVID.
- » “Overcrowded” as an emotional reaction decreased from 11% last year to 5% in 2021



¹ Coded verbatim responses.
Multiple responses permitted.

VISIT SOUTH WALTON

Summer 2021 Visitor Tracking Study

June 2021 - August 2021

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