

# Walton County Tourism

**Millennial Study**  
October 2022



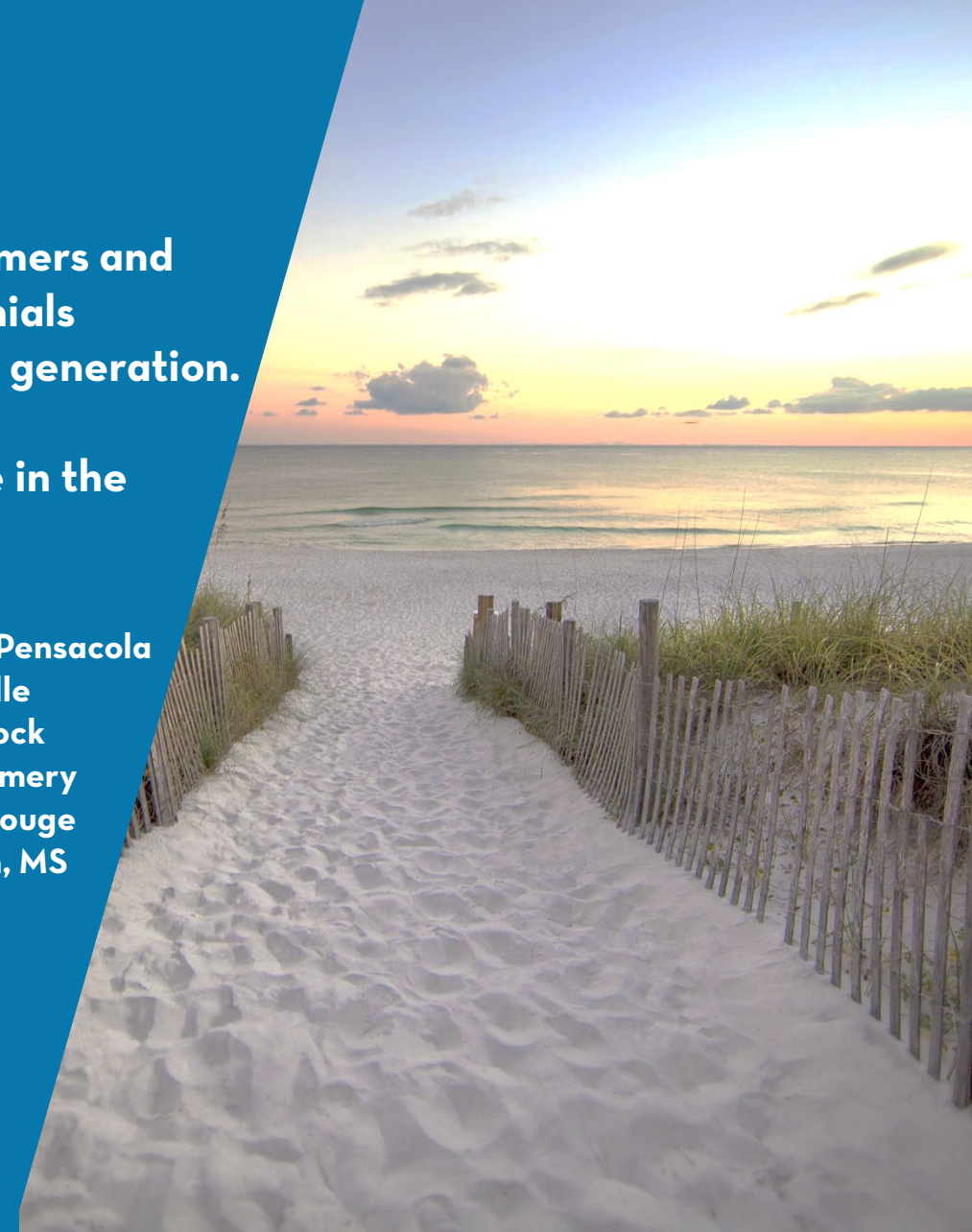
# Purpose & Methodology

Walton County has traditionally performed very well among baby boomers and Gen Xers. The purpose of this study is to learn more about how millennials view Walton County in order to better tailor advertising efforts to this generation.

Surveys were conducted among 25- to 40-year old individuals who live in the following key origin markets:

- Cincinnati
- Charlotte
- Columbus, GA
- Atlanta
- Indianapolis
- Louisville
- Orlando
- Columbus, OH
- Tampa- St. Petersburg
- Knoxville
- Fort Myers-Naples
- Chattanooga
- Saint Louis
- Kansas City
- Houston
- New Orleans
- Dallas-Fort Worth
- Birmingham
- Austin
- Memphis
- Evansville
- Oklahoma City
- Nashville
- Tulsa
- Mobile-Pensacola
- Huntsville
- Little Rock
- Montgomery
- Baton Rouge
- Jackson, MS
- Denver

Surveys were completed with 811 vacation decision makers who had taken at least one overnight vacation in paid accommodations in the past year.



# EXECUTIVE SUMMARY



# Key Takeaways - Generations

There is a strong correlation between where millennials went on beach vacations with their parents and where they take their children on beach vacations. Panama City Beach, Myrtle Beach, and Destin are the top three in both cases.

There is some leakage, e.g., fewer millennials take beach vacations with their children than went on beach vacations with their parents. Cost is most likely a key factor, as well as time. Leakage ranges from 0% points (e.g., just as many millennials went on beach vacations with their parents to Amelia Island as take their children there) to 11% points (e.g., 39% went on beach vacations with their parents to Panama City Beach, yet only 28% have taken their children there). Leakage for Walton County is only 2% points.

Leakage is highest for Panama City Beach, Destin, SE Florida, and Key West. Leakage is lowest for Amelia Island, Golden Isles, Walton County, Hilton Head, Sarasota, and Naples. One can surmise that, comparatively speaking, destinations with less leakage are more attractive to millennials than they were to their parents.



# Key Takeaways - Generations

Only 17% went to Walton County with their parents.

However, 56% of millennials went to Panama City Beach, Destin, or Walton County with their parents while growing up.

Only 15% of millennials have taken vacations in Walton County with their children. However, 50% have taken their children to Destin, Panama City, or Walton County.

Millennials have more experience in adjacent beaches than in Walton County, yet they are familiar with the general area.

Marketing can help transition millennials to Walton County by focusing on:

- White sugary sand beaches and turquoise blue water,
- Relax and reduce stress,
- I work hard and deserve a Walton County vacation,
- Terrific family vacation destination - great place for families to bond,
- Load up the SUV, spend a week, & never get in your vehicle until you leave,
- Instagrammable vacation.



# Key Takeaways – Moving Up

There is definitely a generational component to millennials' beach vacations.

- 78% took one with their parents while growing up,
- 70% have taken one with their parents since turning 21,
- 83% of those with children have taken one with their children.

As the previous slide demonstrates, there is movement from Destin/Panama City Beach to Walton County as millennials move from their childhood trips to their adult trips. This creates an opportunity for some emotionally powerful marketing messages directed at millennials.

A related marketing opportunity is evidenced by the fact that 70% of millennials after turning 21 have taken beach vacations with their parents. Previous research suggests multi-generational vacations are prevalent in Walton County. This study reinforces this concept.



# Key Takeaways – Personal/Work Flexibility

Millennials have significant freedom in their schedules that create marketing opportunities for Walton County.

2 in 3 millennials have personal/work flexibility to take family vacations in September, October, and November. While occupancy in Walton County during these 3 months continues to increase, there is certainly more capacity during this time period compared to Spring and Summer.

Nearly half of millennials (44%) also have personal/work flexibility to take family vacations during December, January, and February.

Focusing on September through February enables Walton County's messaging to motivate millennials to create their own traditions in their own time.

Given millennials', especially those with children, busy lives, it was feared that they could not respond to special, time-sensitive, marketing deals that South Walton might offer to fill low occupancy periods. Yet nearly 3 in 5 do have personal/work flexibility to do spur-of-the-moment vacations.



# Key Takeaways – Play to the Kids

Two in five millennials say their children are very influential in making family vacation decisions and another one in five say their children are significantly involved in decision making for vacations. While Walton County has tested ads among adults, it has never received feedback from children. This finding suggests that some research should be conducted among children OR more advertising should focus on children.



# Key Takeaways - Obstacles

25 attributes of Walton County were presented to millennials.

While cost is an issue for many millennials, the number one obstacle to not visiting Walton County is not feeling like they belong there.

There are high negative scores on the following:

- Too snobby for them (30%),
- They feel out of place in Walton County (37%),
- It's a place for their parents (67%),
- Beautiful, but do not see myself there (26%).

Cost is a concern as 36% of millennials claim Walton County is too expensive, and only 23% see it as “definitely affordable.”

44% of millennials prefer to take their children to a destination that has more activities. Responses to this attribute correlate highly with 41% who prefer to go to Destin or Panama City Beach rather than Walton County.

2 in 5 millennials (43%) think Walton County is too crowded in the Spring & Summer.



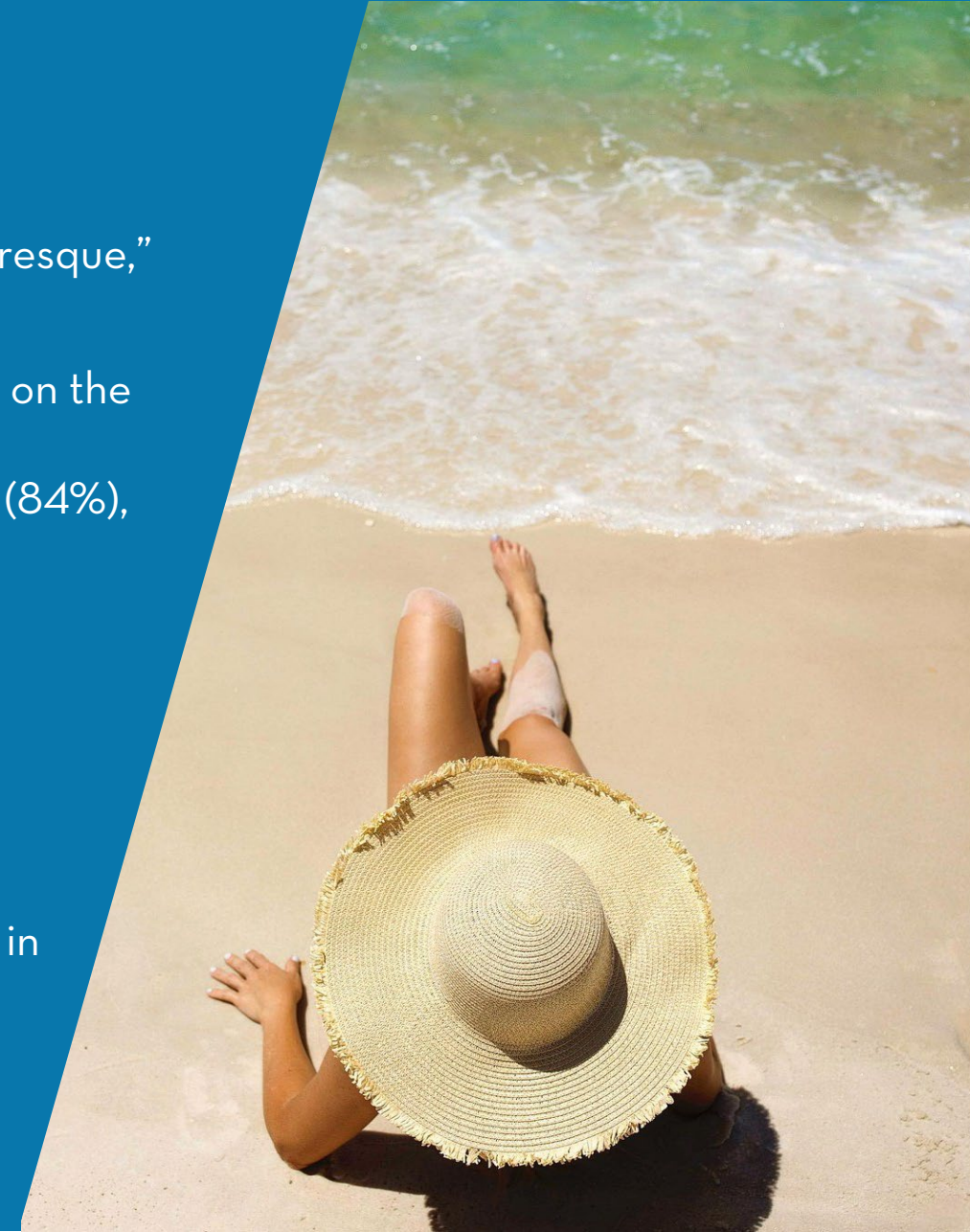
# Key Takeaways – Opportunities

In describing Walton County, millennials reference phrases such as “Picturesque,” “Beautiful white sand and clear water,” “Relaxing & peaceful,” and “Fun.”

In responding to the 25 attributes about Walton County, millennials focus on the following:

- Gorgeous beaches with white sugary sand and turquoise blue water (84%),
- Great place to relax and reduce stress (83%),
- I work hard and deserve a Walton County vacation (76%),
- Terrific family vacation destination (75%),
- Great place for families to bond (75%),
- Love to load up the SUV and spend a week there (75%),
- Instagrammable (73%).

It will be important to include heavy doses of these thoughts and feelings in marketing materials directed at millennials.



# Key Takeaways – Opportunities

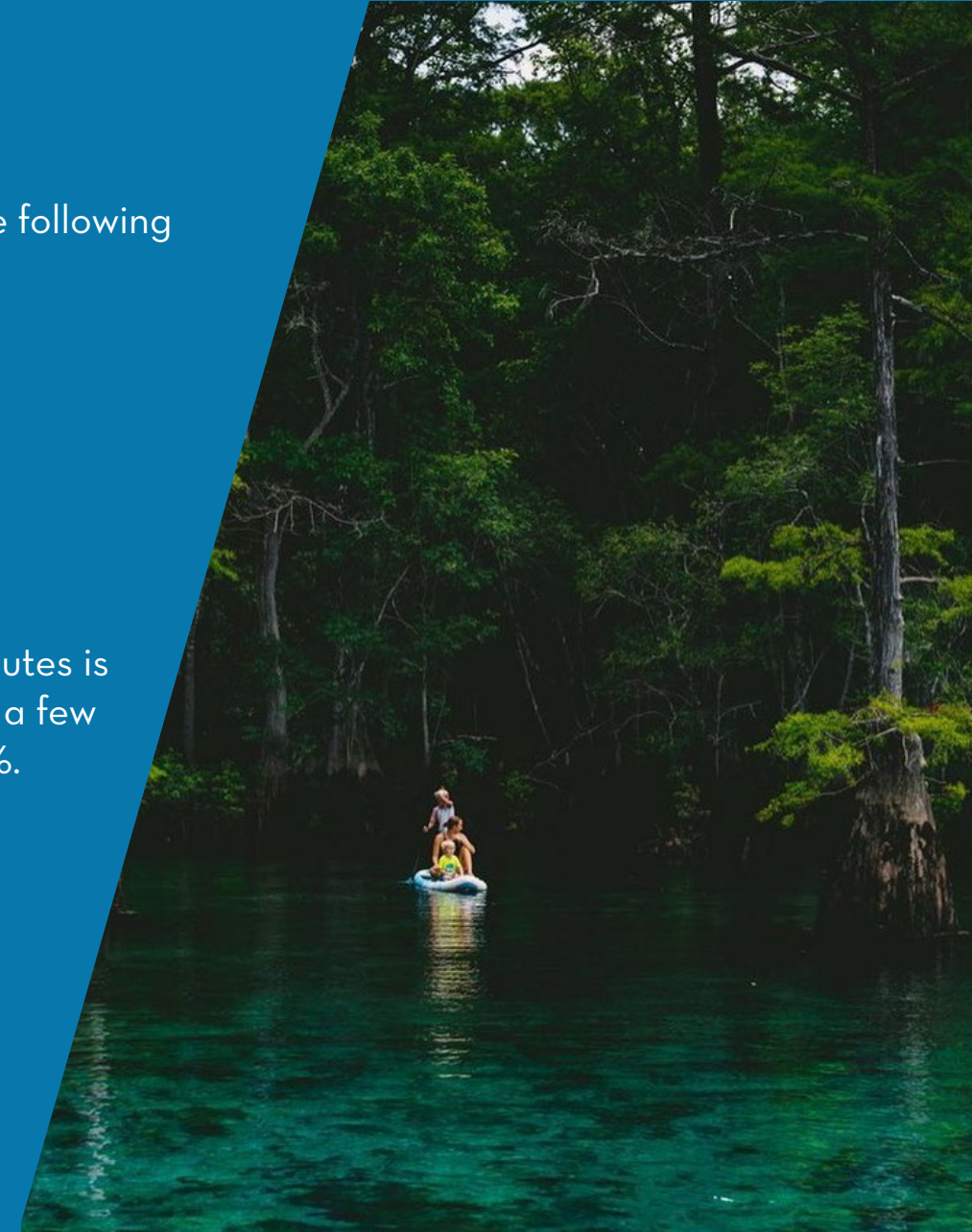
In describing where they would “definitely” take a vacation, millennials focus on the following out of a total of 19 attributes:

- Sugary white sand and turquoise blue water (65%),
- Enjoy nature as well as the beach (63%),
- Spend dedicated family time together (63%),
- Park my vehicle and walk to everything (60%),
- Don’t have to worry about a schedule or agendas (60%),
- Totally relax in a safe, friendly, upscale environment (60%).

None of these scores are off the charts, and the range of scores across most attributes is narrow, i.e., most attributes appeal to millennials, but non dramatically so and only a few are panned. For example, 16 of the 19 attributes scores are between 50% and 65%.

While 63% “definitely” want a destination that enables them to “enjoy nature as well as the beach,” only 38% want a destination where they can paddle board on dune lakes. So, how nature is portrayed in marketing is important.

How the upscale nature of Walton County is portrayed is also important; 60% will definitely vacation where they can “totally relax in a safe, friendly, upscale environment.” Yet only 33% want to vacation with “other upscale people like me.”



# Key Takeaways – Noticing Walton County

Walton County is certainly in millennials' consciousness. Three in five have searched for or noticed Walton County.

Of millennials who have noticed or searched for information about Walton County

- 76% noticed Walton County on Instagram or Facebook,
- 86% took action after noticing information about Walton County.
  - Over two in five (43%) searched the internet for more information,
  - Three in ten asked a friend about Walton County, went to [VisitSouthWalton.com](http://VisitSouthWalton.com), or went to Walton County's Facebook page.



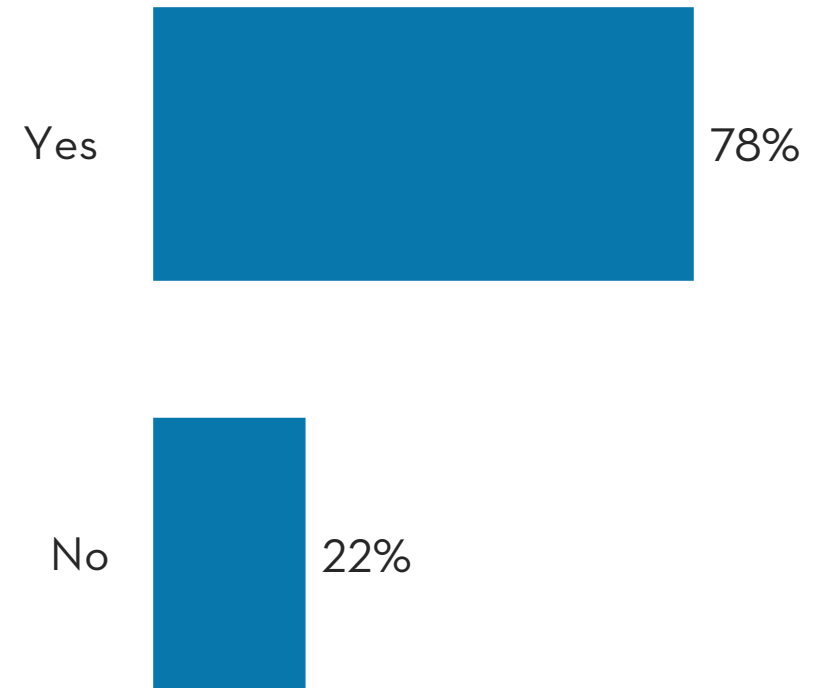
# DETAILED FINDINGS



# CHILDHOOD BEACH VACATIONS

## Took Beach Vacations with Parents

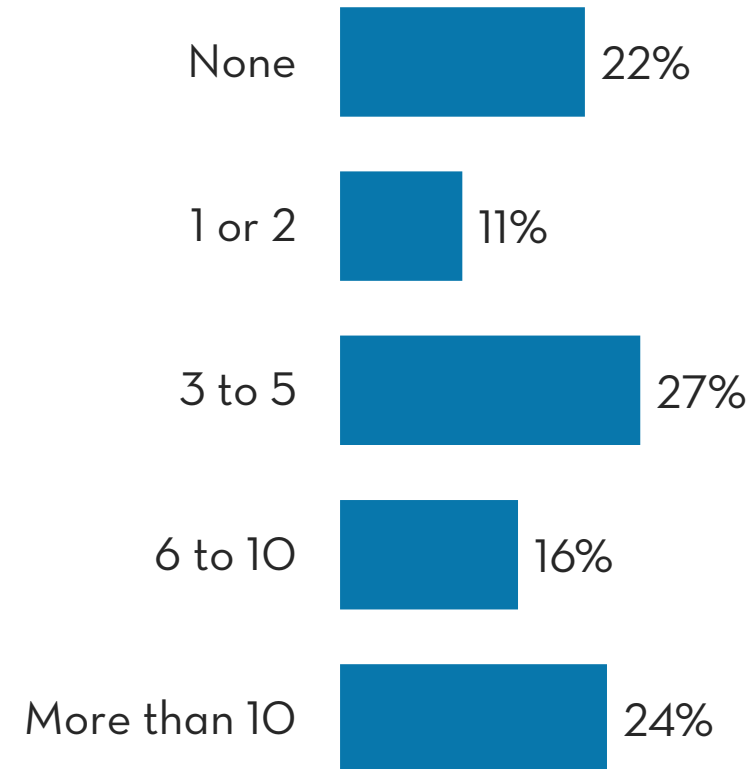
 **Nearly 4 in 5** millennials took beach vacations with their parents while growing up.



# NUMBER OF CHILDHOOD BEACH VACATIONS

- 2 in 3 millennials took at least 3 beach vacations with their parents **before** they were 21 years old.
- Nearly 1 in 4 took over 10 beach vacations with their parents while growing up.

## Number of Beach Vacations with Parents



# LOCATION OF CHILDHOOD BEACH VACATIONS<sup>1</sup>

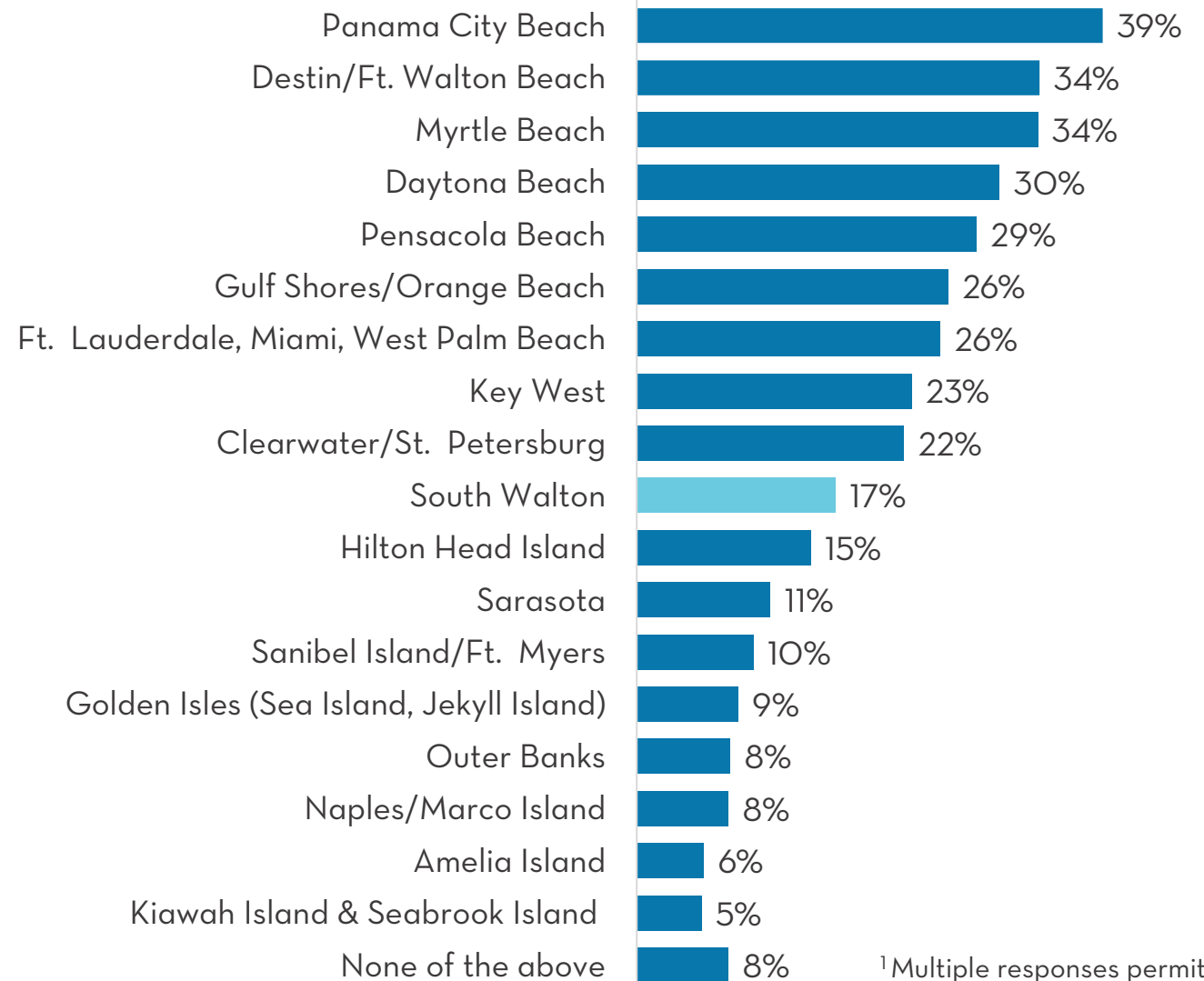
🌊 **17%** of millennials took beach vacations to **Walton County** with their parents growing up.

🌊 The northern Florida Gulf Coast is popular with millennials' parents:

🌊 **2 in 5** millennials went to **Panama City Beach**,




🌊 **1 in 3** went to **Destin/Fort Walton Beach**,

🌊 **3 in 10** went to **Pensacola**.

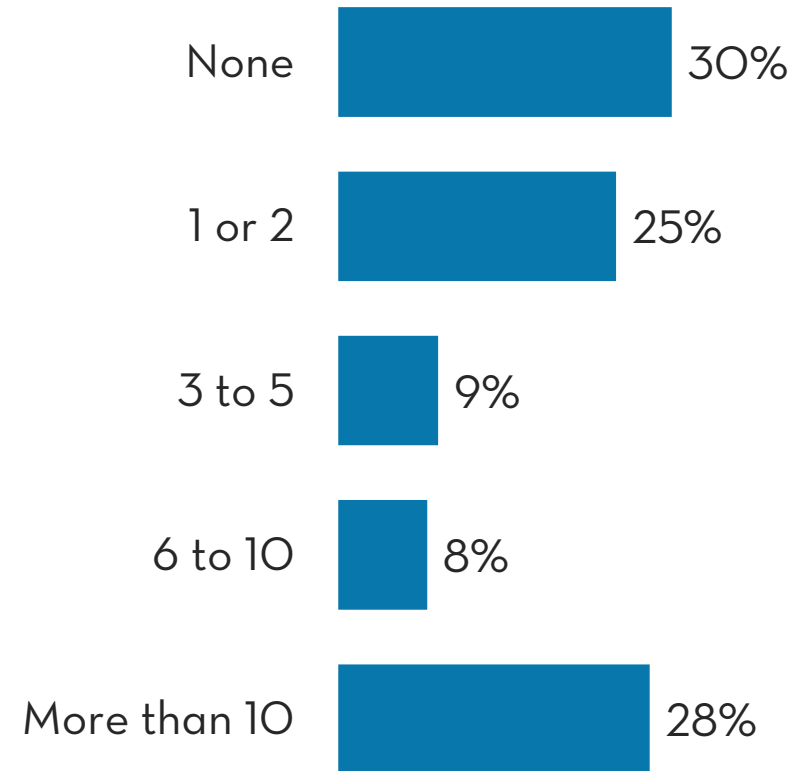


<sup>1</sup>Multiple responses permitted.

# ADULT BEACH VACATIONS WITH PARENTS

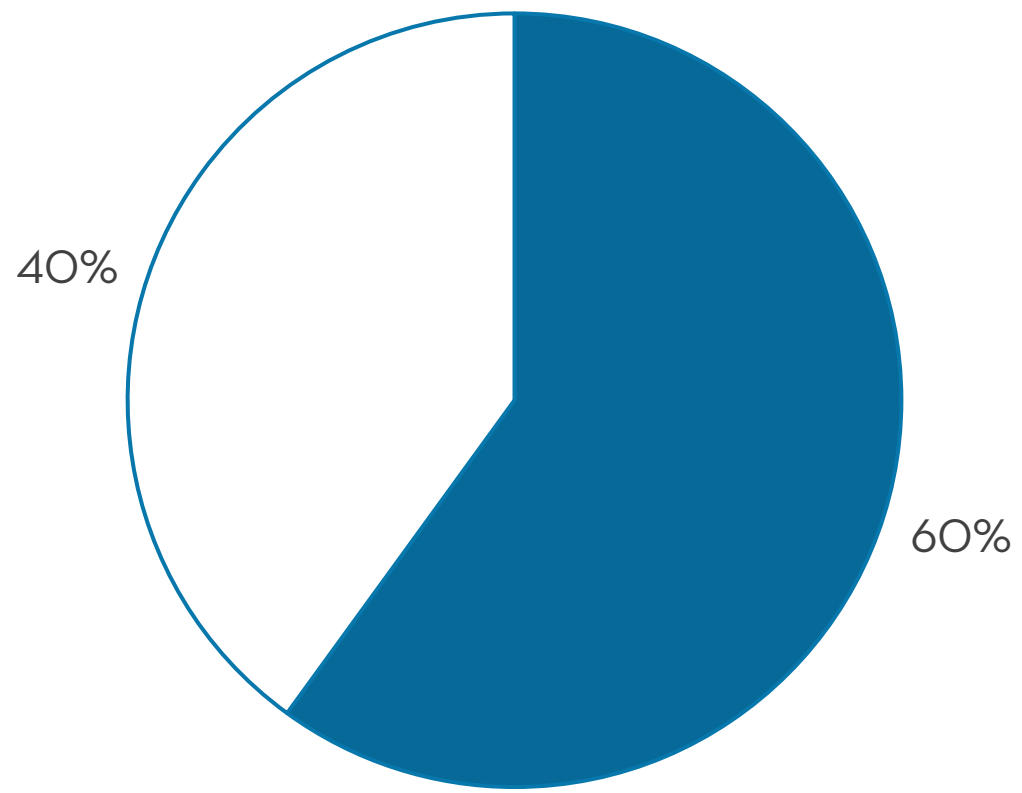
-  **7 in 10** millennials have taken a beach vacation with their parents **since** turning 21 years old.
-  **1 in 4** millennials have gone on **1 or 2** beach vacations with their parents as an adult.
-  **Nearly 3 in 10** millennials have taken **more than 10** beach vacations with their parents since reaching the age of 21.

## Number of Beach Vacations with Parents as an Adult



# MILLENNIALS WITH CHILDREN

 **3 in 5** millennials have children.

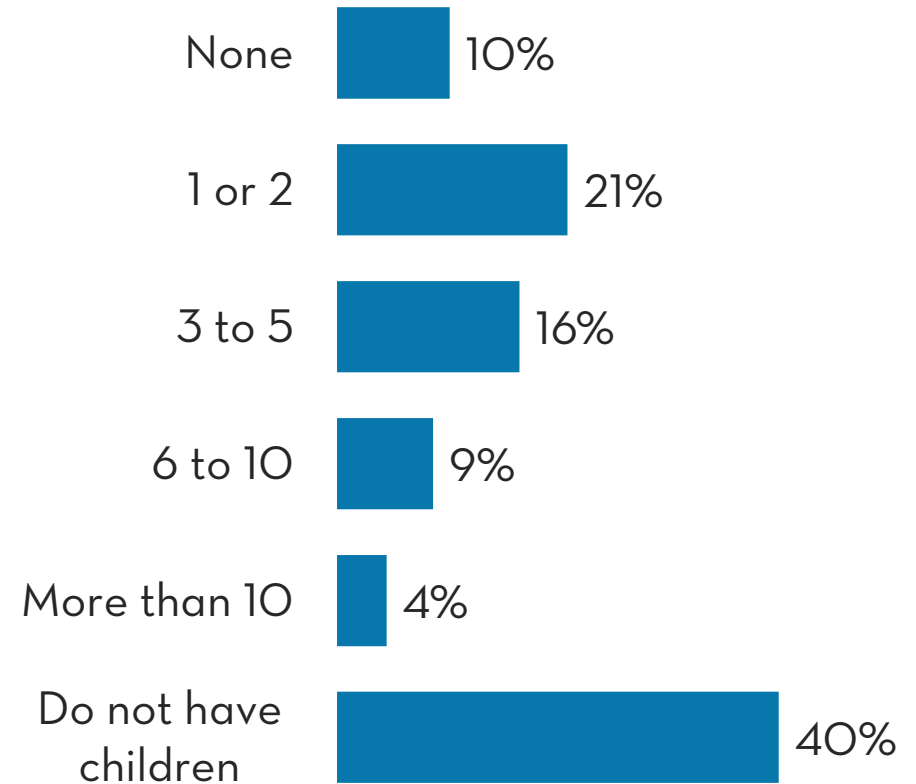


 Have children     Do not have children

# BEACH VACATIONS WITH CHILDREN<sup>1</sup>




- **Half** of millennials have taken a beach vacation with their children.
- **Nearly 3 in 10** millennials have taken **3 or more** beach vacations with their children.

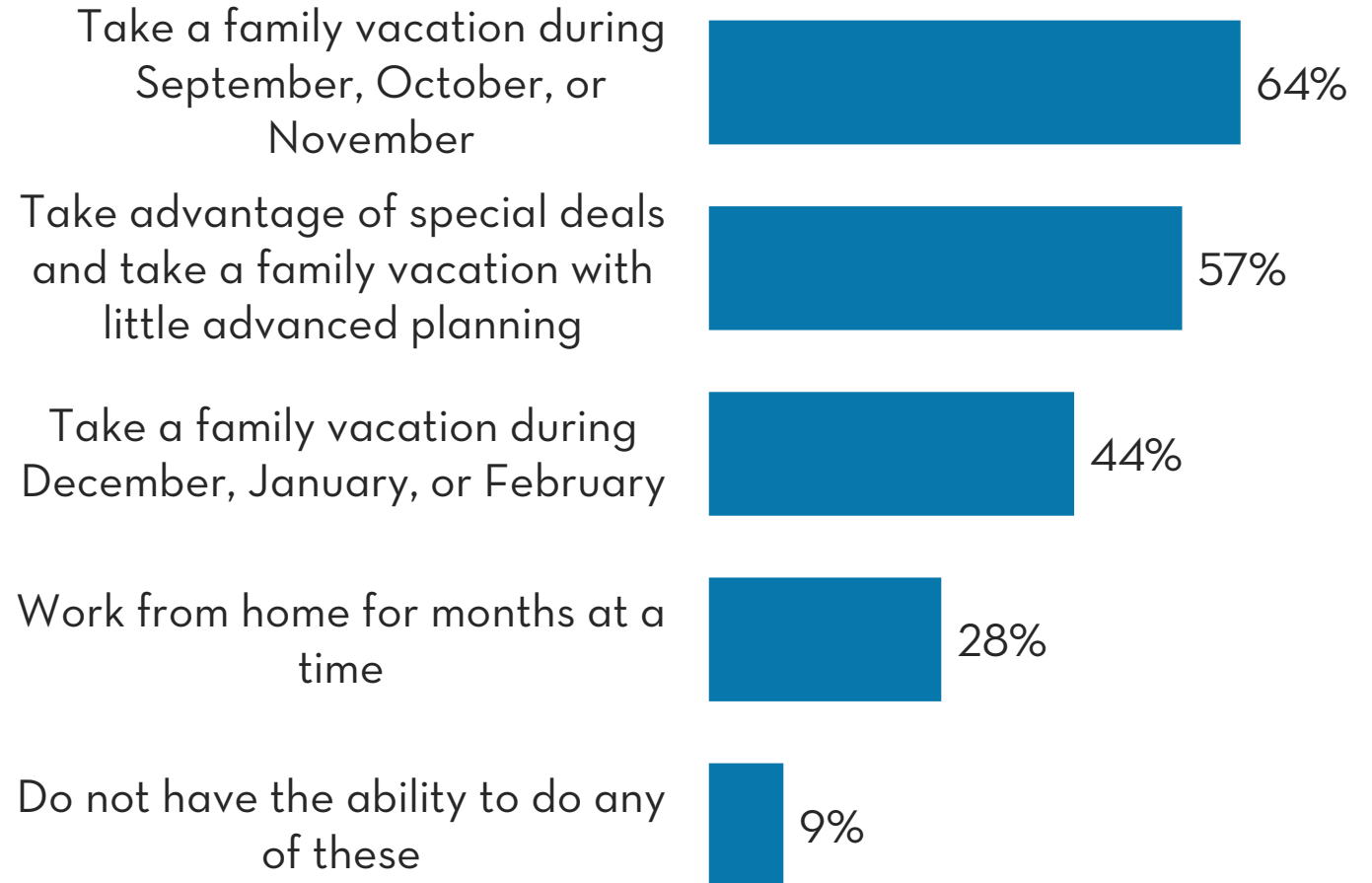
## Beach Vacations with Children



<sup>1</sup>Question was only asked to respondents with children


# FAMILY ABILITY TO TAKE VACATIONS<sup>1</sup>

-  **Nearly 2 in 3** millennials with children have flexibility to take a family vacation during September, October or November, given family and work requirements.
-  **Nearly 3 in 5** millennial families can take a spontaneous vacation.
-  **Nearly 3 in 10** millennials can work from home for months at a time.

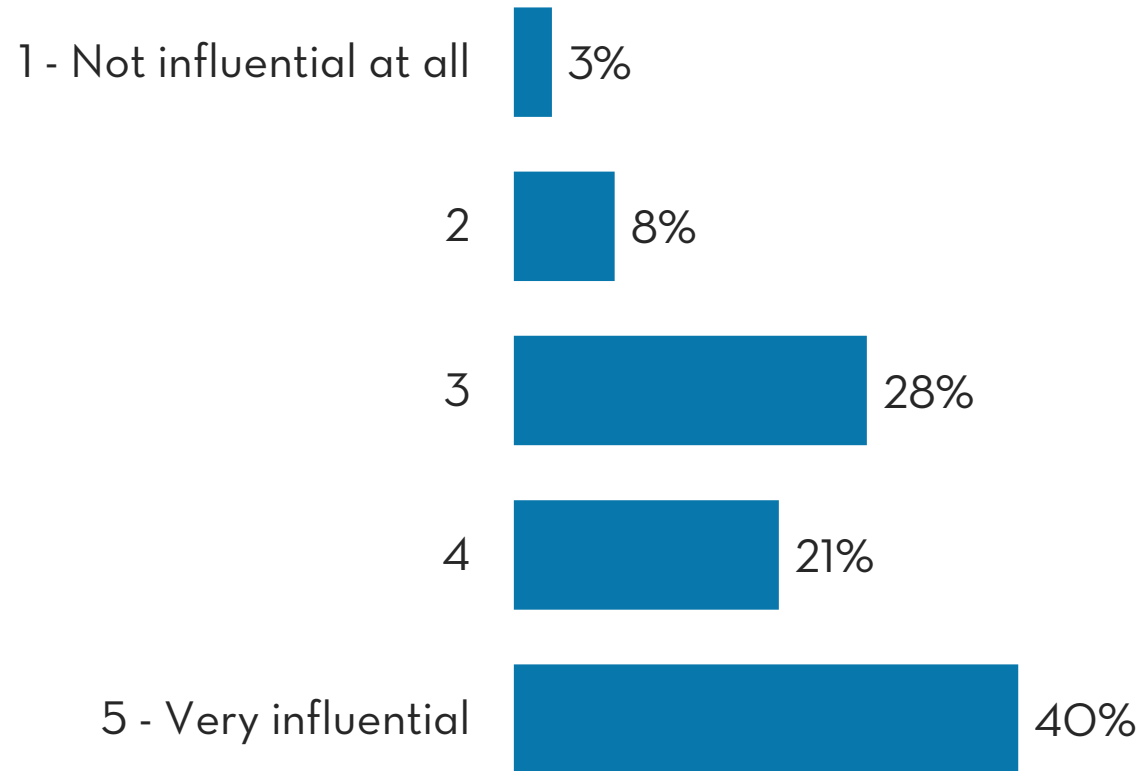


<sup>1</sup>Question was only asked to respondents with children

# INFLUENCE OF CHILDREN ON VACATION DESTINATION<sup>1</sup>


 **2 in 5** millennials say that their children are very influential when choosing a vacation destination.

## Children's Influence on Vacation Planning





<sup>1</sup>Question was only asked to respondents with children

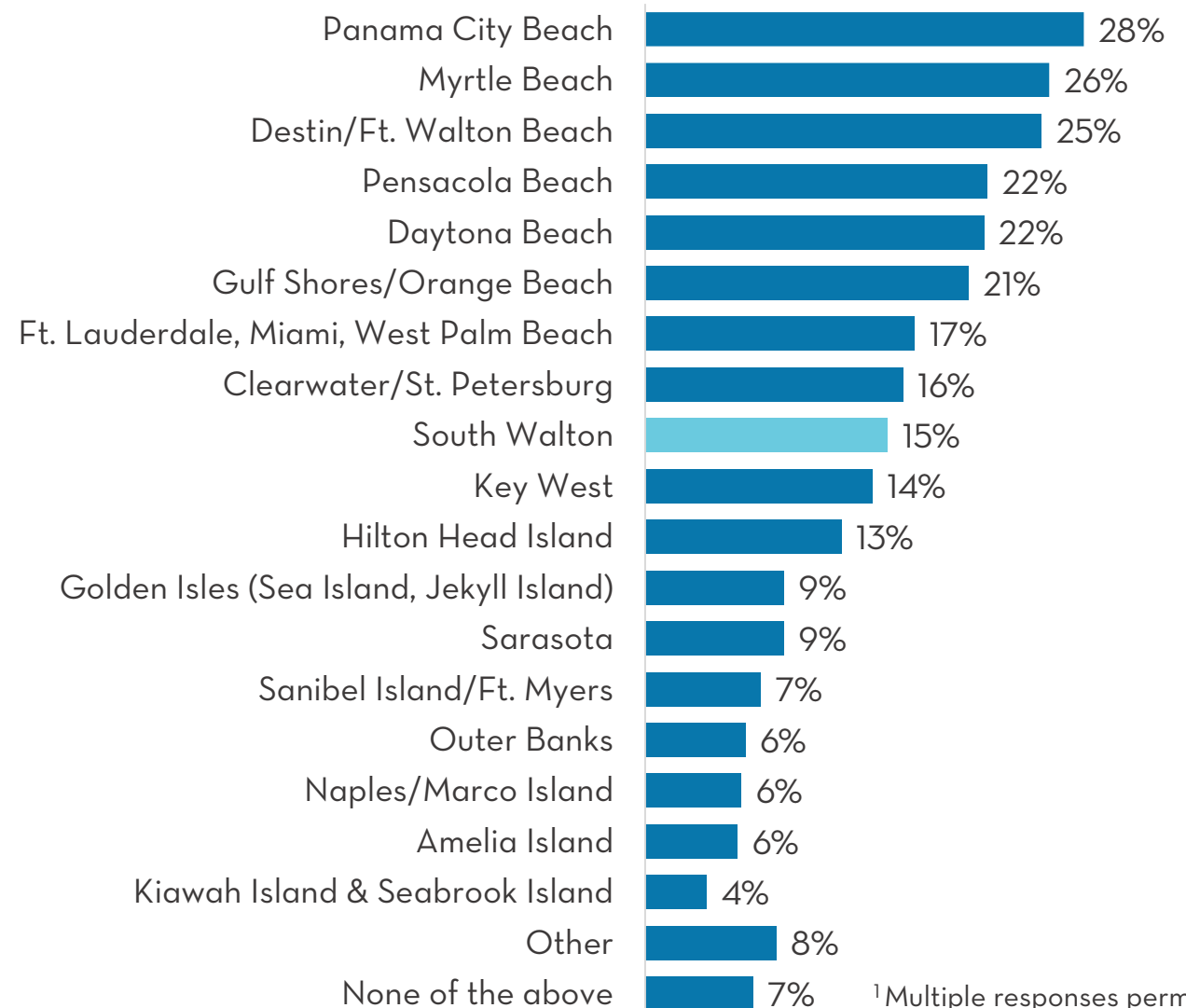
# LOCATION OF BEACH VACATIONS WITH CHILDREN<sup>1</sup>

 **15%** of millennials have taken vacations to **Walton County** with their children.

 **Nearly 3 in 10** millennials have taken their children to **Panama City Beach**.

 **1 in 4** millennials have gone to **Destin/Ft Walton Beach** with their family.

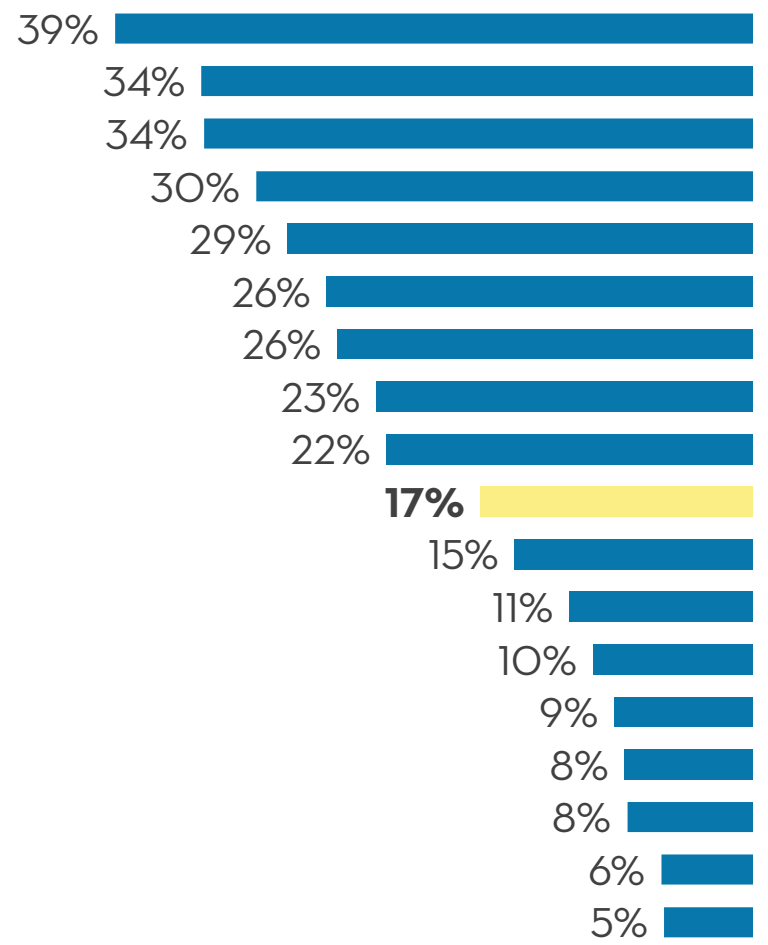
 **Over 1 in 5** millennials have taken their families to **Pensacola Beach or Daytona Beach**.



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

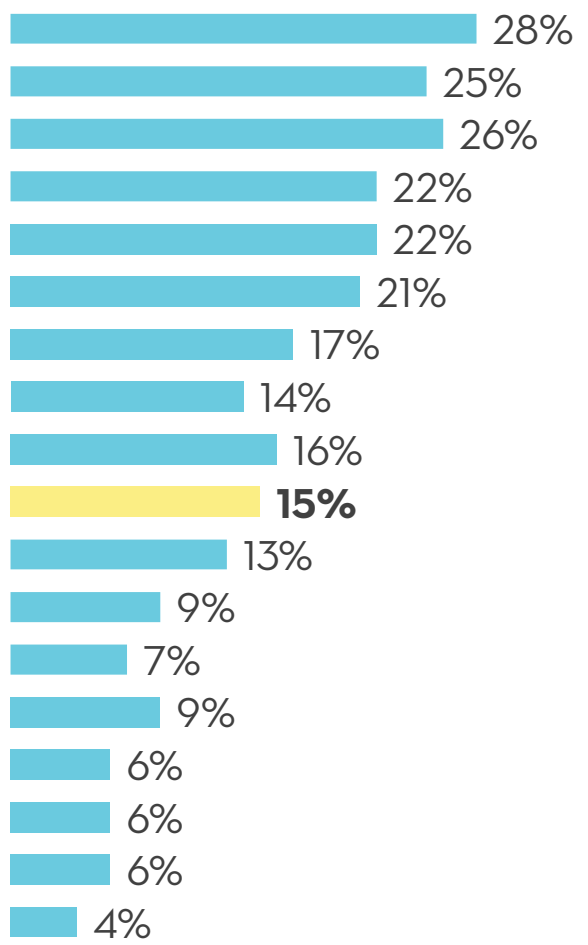
# CHILDHOOD VACATIONS VS. VACATIONS AS PARENTS<sup>1</sup>

## Childhood Vacations



## Vacations with Children

- Panama City Beach
- Destin/Ft. Walton Beach
- Myrtle Beach
- Daytona Beach
- Pensacola Beach
- Gulf Shores/Orange Beach
- Ft. Lauderdale, Miami, Palm Beach
- Key West
- Clearwater/St. Petersburg
- Walton County**
- Hilton Head Island
- Sarasota
- Sanibel Island/Ft. Myers
- Golden Isles (Sea Island, Jekyll Island)
- Outer Banks
- Naples/Marco Island
- Amelia Island
- Kiawah Island & Seabrook Island

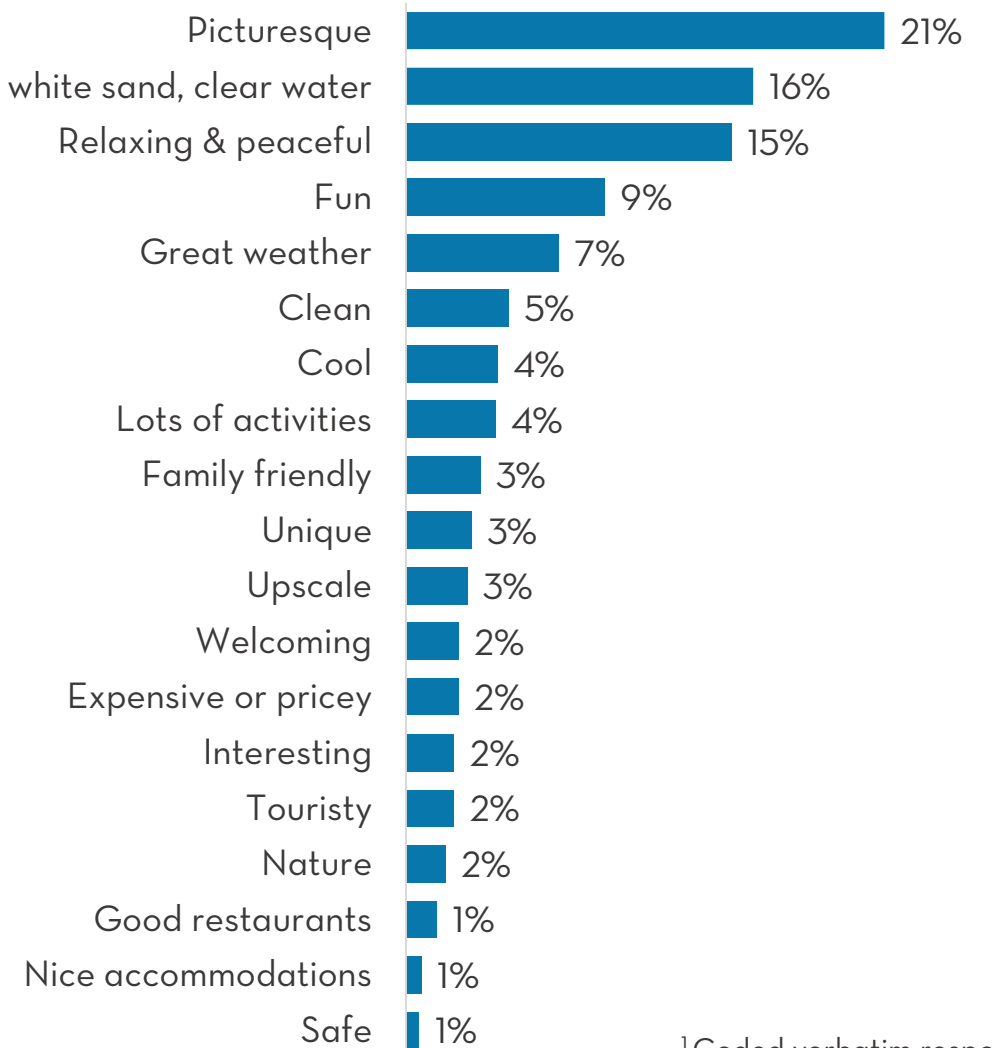


## Leakage



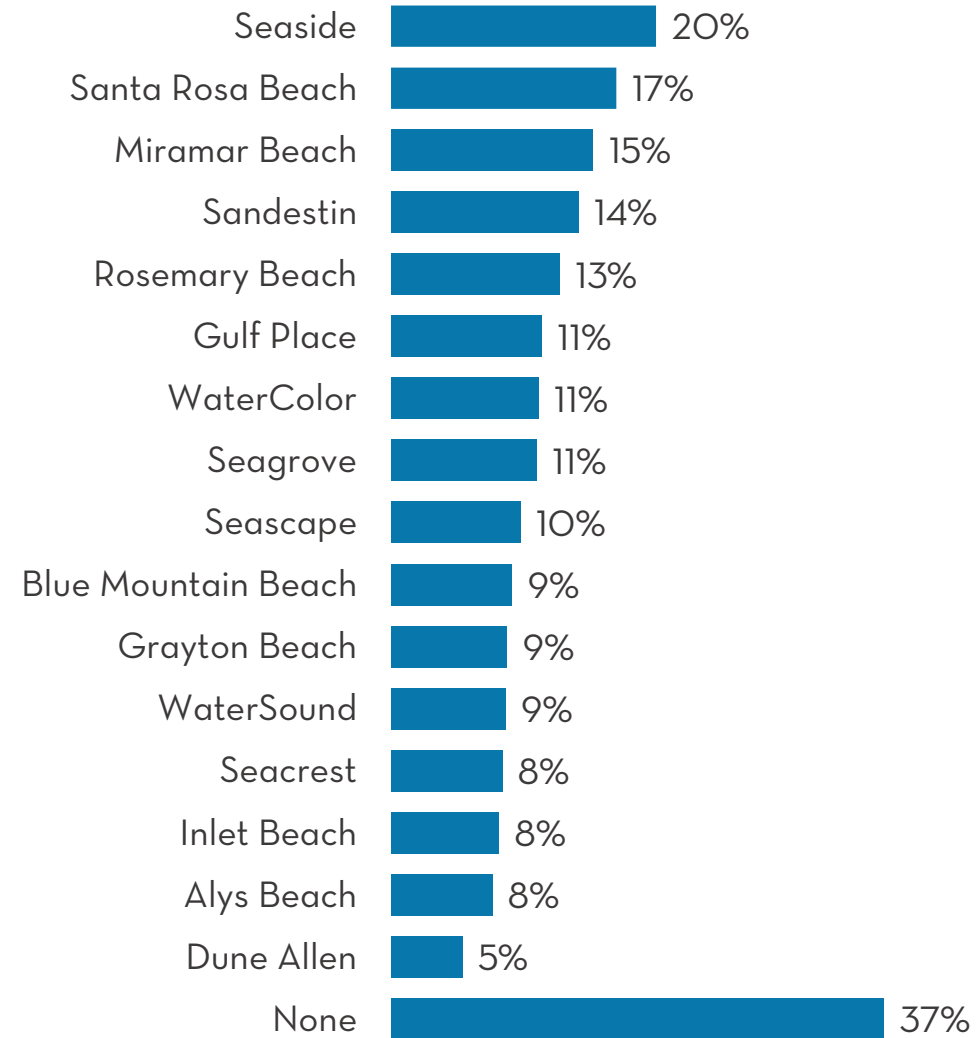
# INITIAL DESCRIPTIONS OF WALTON COUNTY<sup>1</sup>

- Over 1 in 5 millennials would describe Walton County as picturesque.
- Nearly 1 in 6 millennials describe the beautiful beaches of Walton County when asked what they know or have heard about the area.
- 15% of millennials say that Walton County is relaxing and peaceful.



<sup>1</sup>Coded verbatim responses.

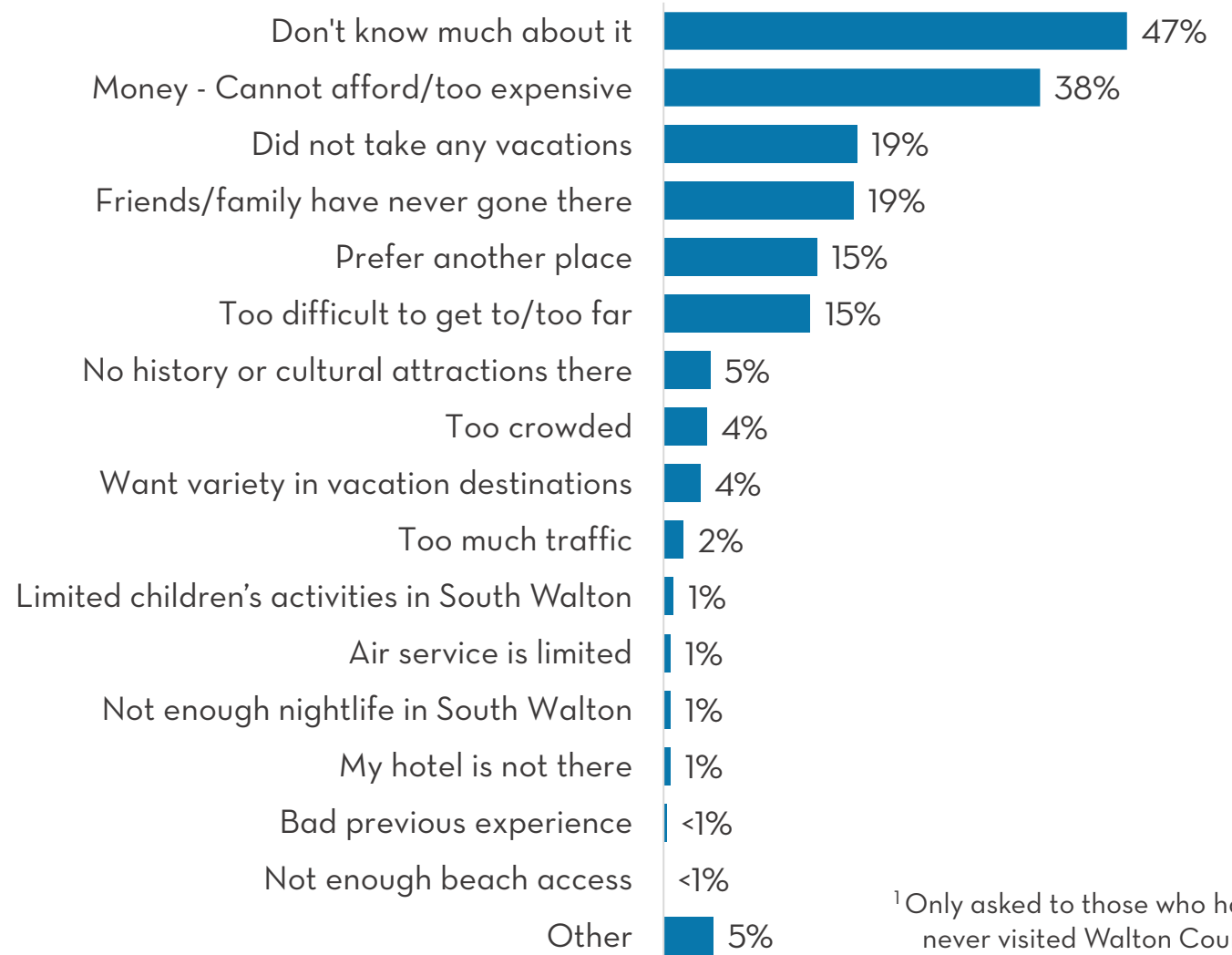
# WALTON COUNTY BEACH NEIGHBORHOODS VISITED



# AVOIDANCE<sup>1</sup>

🌊 **Nearly half** of millennials who have not visited Walton County say that they **don't know much about the locale**.

🌊 **Nearly 2 in 5** millennials give **money** as the reason they have not vacationed in Walton County.



<sup>1</sup> Only asked to those who have never visited Walton County.

## Likelihood of taking a vacation to Walton County<sup>1</sup>

With Children <sup>2</sup>	<b>7.8</b>
With Partner or Spouse	<b>7.5</b>
With Friends	<b>6.5</b>
By yourself	<b>5.1</b>

<sup>1</sup>Based on a scale of 0 (Not likely) to 10 (Definitely).

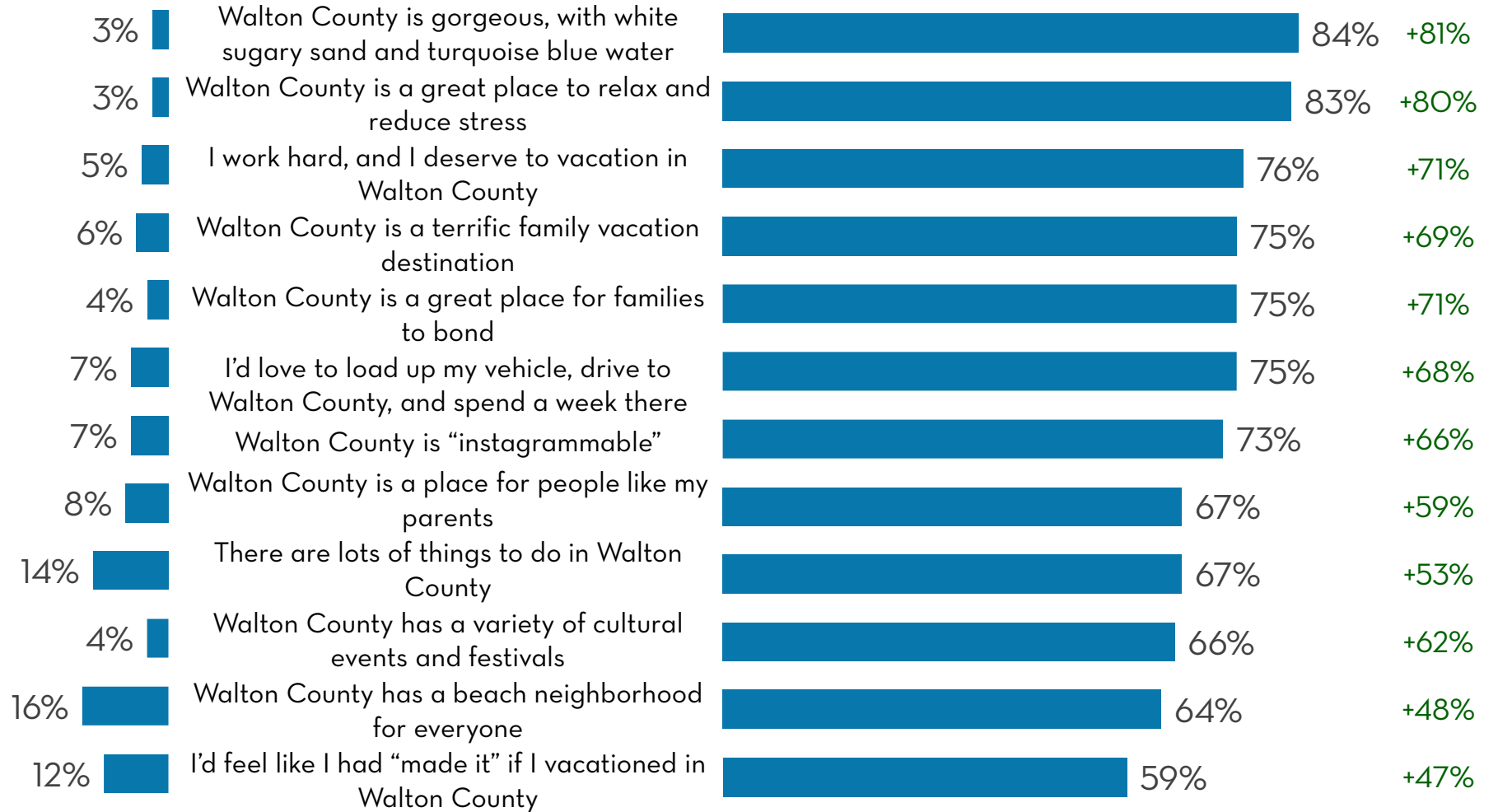
<sup>2</sup>Question was only asked to respondents with children

# WALTON COUNTY STATEMENTS

## Disagree & Strongly Disagree

## Agree & Strongly Agree

## Gap

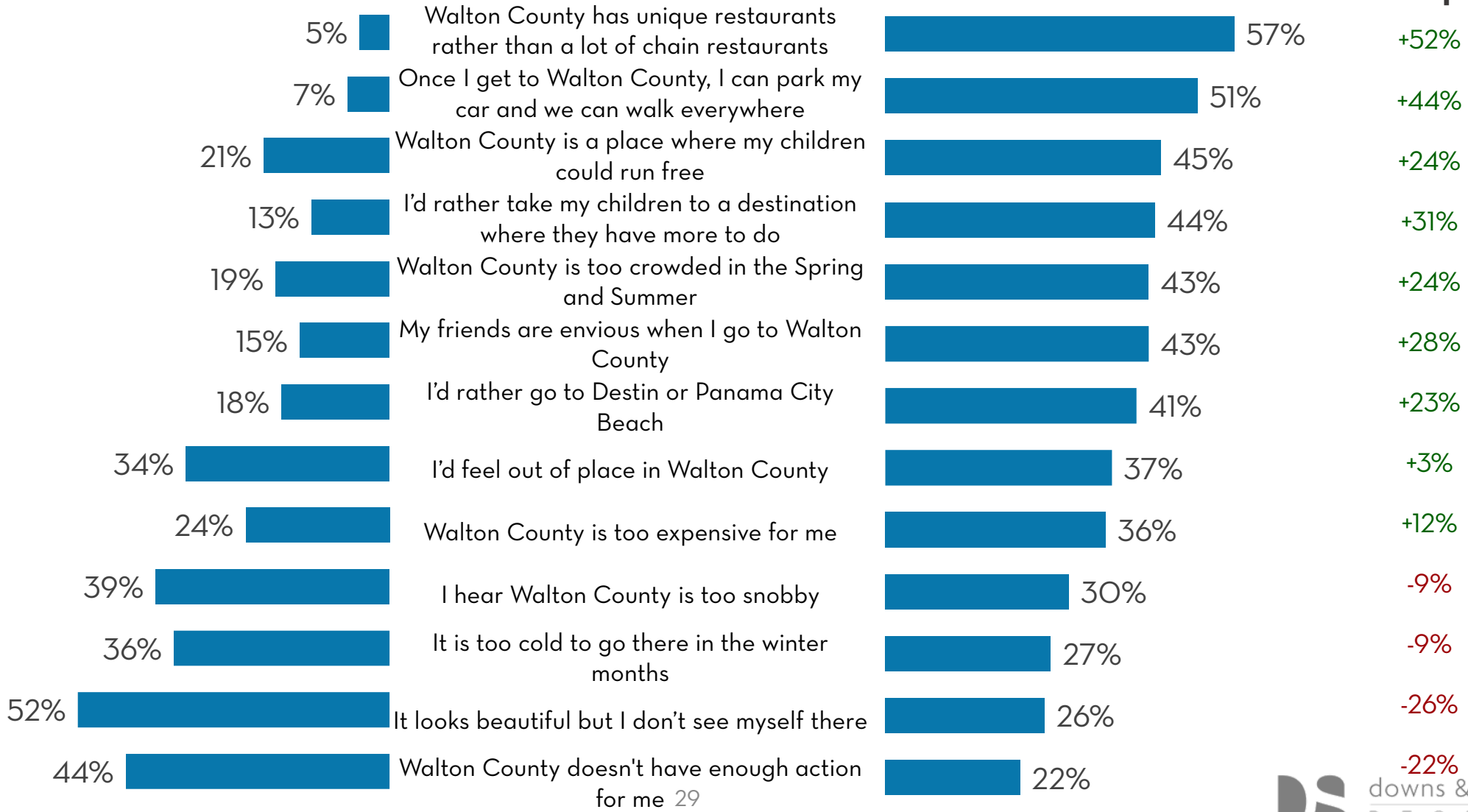


# WALTON COUNTY STATEMENTS

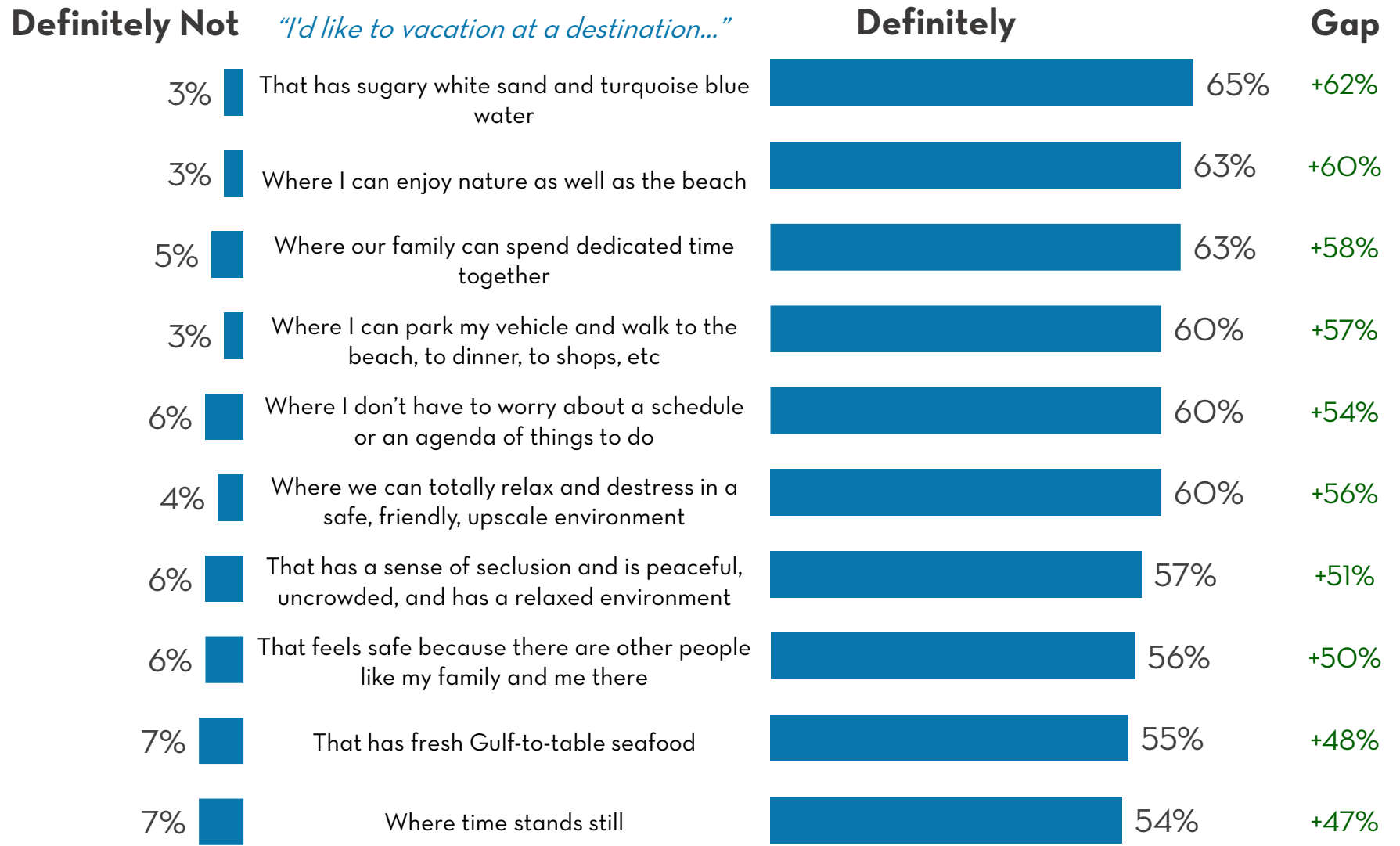
## Disagree & Strongly Disagree

## Agree & Strongly Agree

## Gap



# VACATION DESTINATION LIKELIHOOD



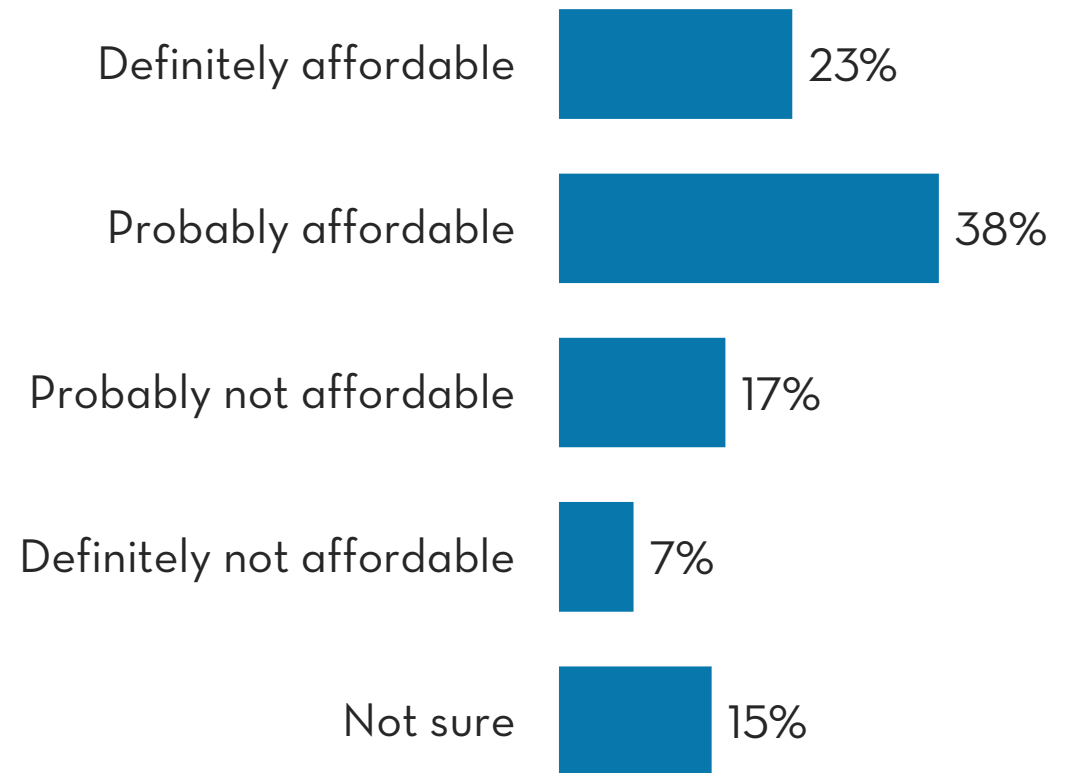
# VACATION DESTINATION LIKELIHOOD





# AFFORDABILITY OF WALTON COUNTY

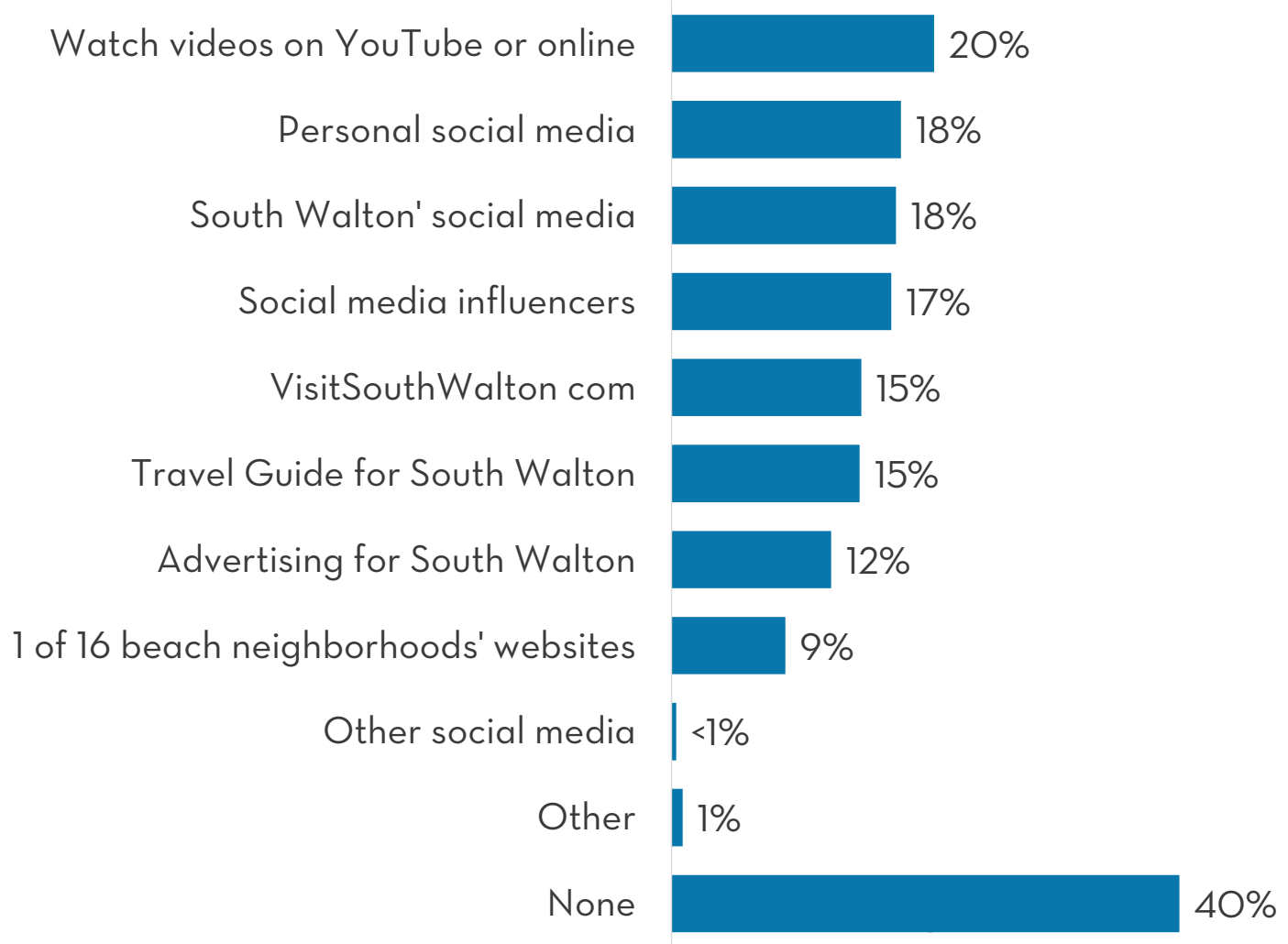
## Affordability of a Walton County Family Vacation

- **Over 3 in 5** millennials can afford a Walton County vacation.
- **Nearly 1 in 4** millennials can not afford a to take their family to Walton County.



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

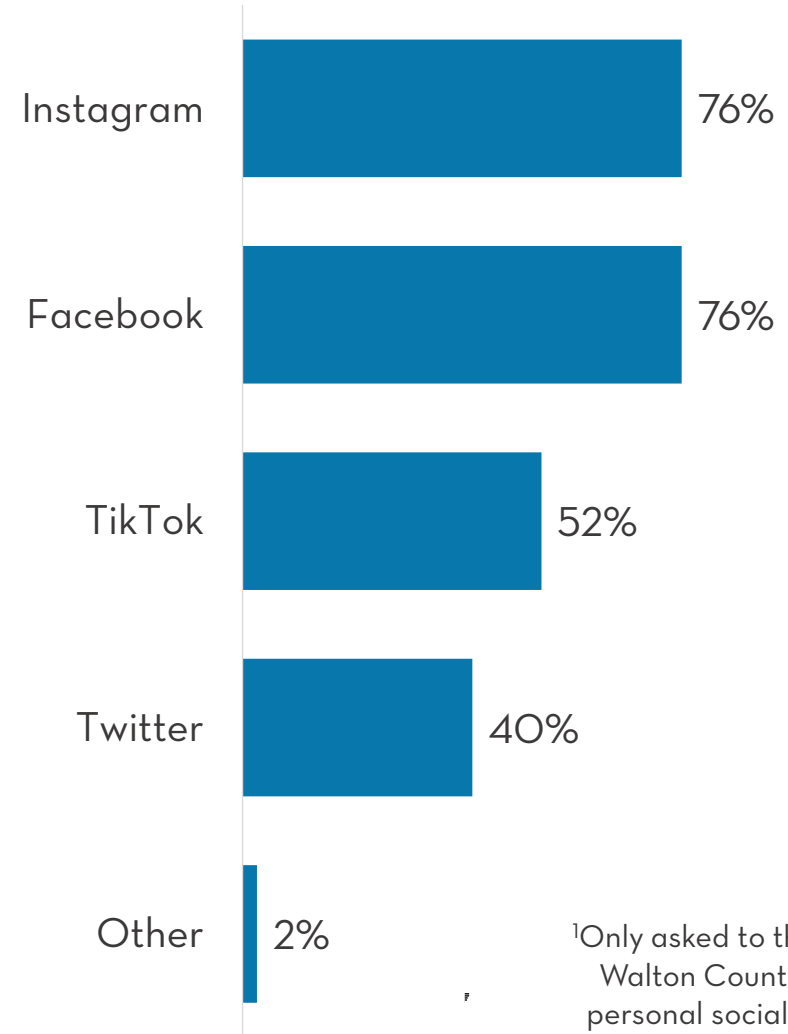
-  **3 in 5** millennials have searched for or noticed information about Walton County.
-  **1 in 5** millennials have seen information about Walton County while watching videos on YouTube or online.



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

# WALTON COUNTY SOCIAL MEDIA<sup>1</sup>

- **Over 3 in 4** millennials who noticed information about Walton County on social media, saw it on **Instagram and Facebook.**
- **Over half** of millennials who noticed information about Walton County on social media, saw it on **TikTok.**

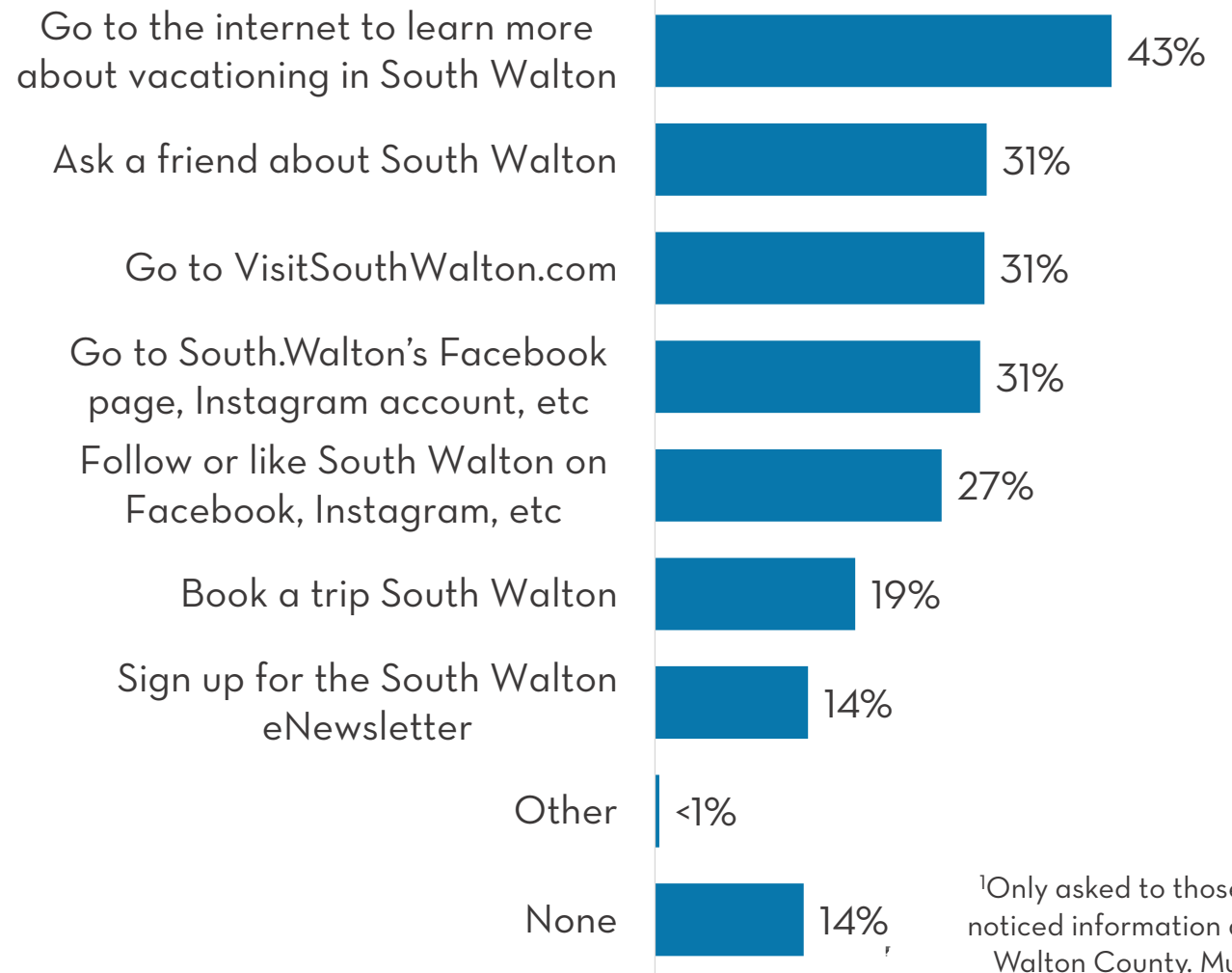


<sup>1</sup>Only asked to those who selected Walton County's social media or personal social media in previous question. Multiple responses permitted.

# ACTIONS AFTER NOTICING WALTON COUNTY INFORMATION<sup>1</sup>

- 86% of millennials took some sort of action after noticing information about Walton County.
- Over 2 in 5 millennials that noticed information about Walton County went to the internet to learn more about vacationing in Walton County.
- Nearly 1 in 5 millennials that noticed information about Walton County booked a trip to the area.

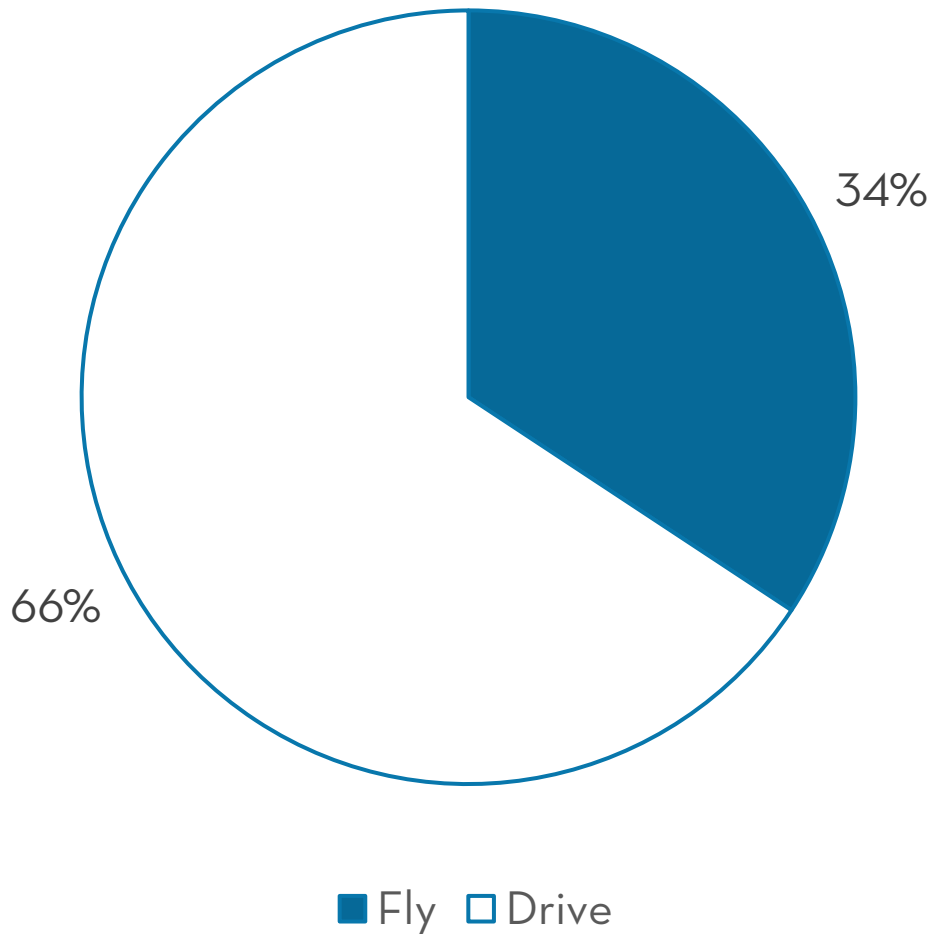
Base: 60% of millennials who noticed information



<sup>1</sup>Only asked to those who noticed information about Walton County. Multiple responses permitted.

# INTENT TO DRIVE OR FLY

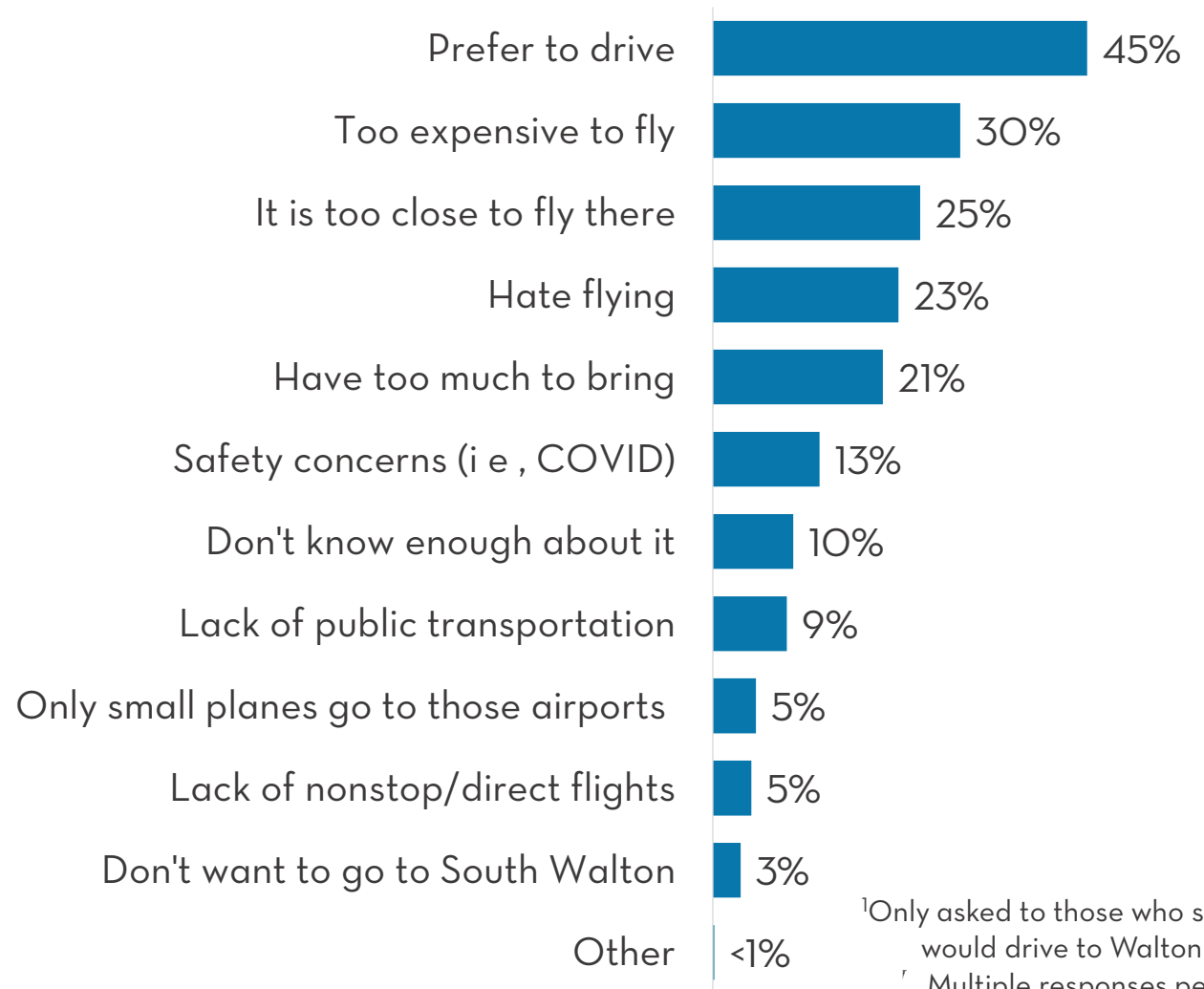
 **2 in 3** millennials would drive to Walton County.



# REASONS NOT TO FLY<sup>1</sup>

- **Nearly half** of millennials just prefer to drive rather than fly to Walton County.
- **3 in 10** millennials who say they would drive to Walton County say that flying is too expensive.
- **1 in 4** millennials who would drive to Walton County say the destination is too close to fly.

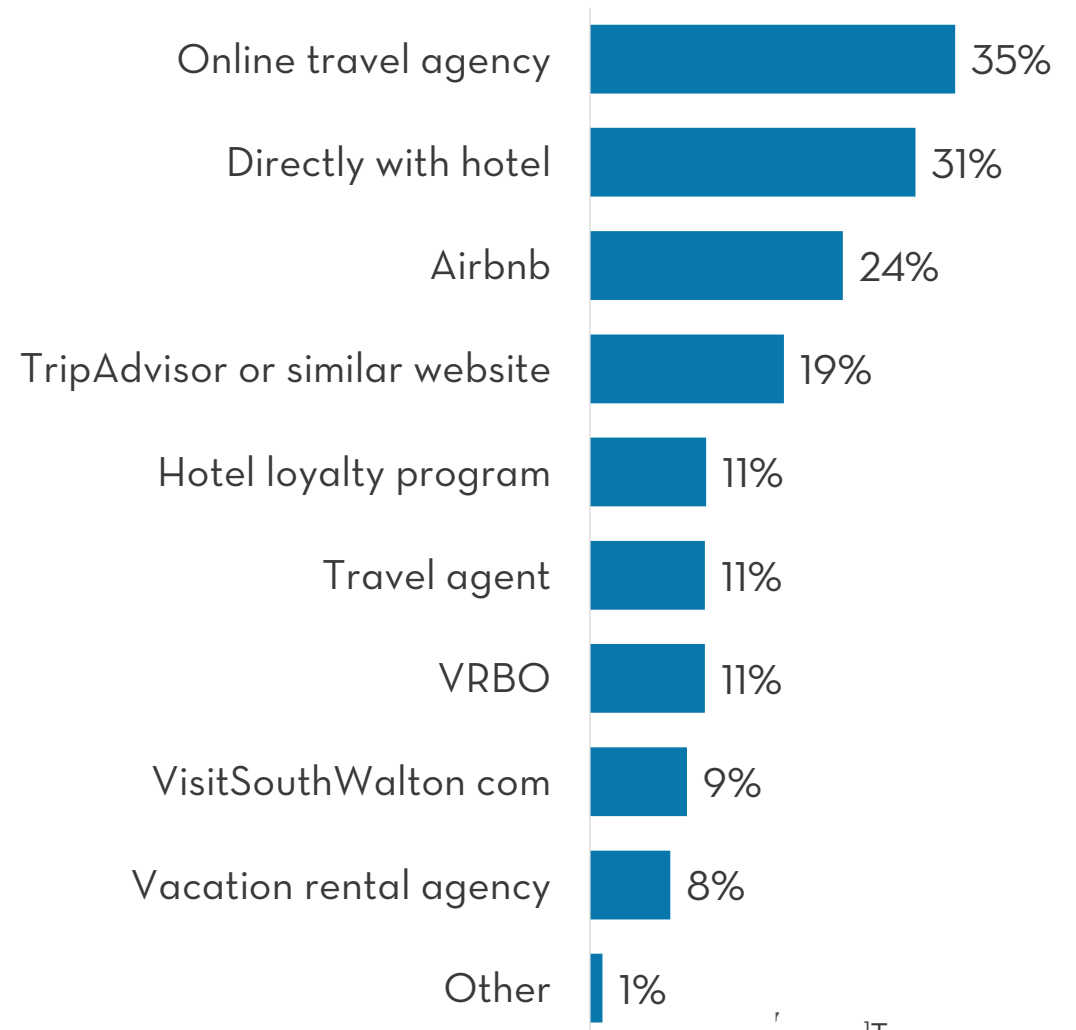
Base: **66%** of millennials who would drive to Walton County



<sup>1</sup>Only asked to those who said they would drive to Walton County.  
Multiple responses permitted.

# BOOKING ACCOMMODATIONS<sup>1</sup>

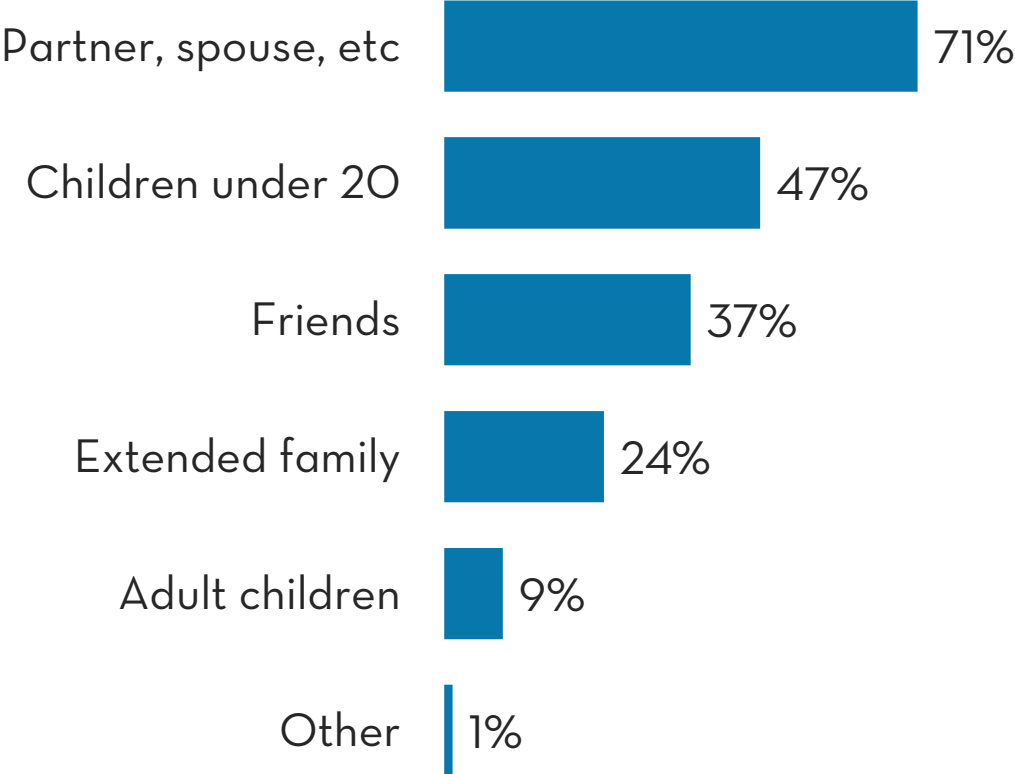
- **35%** of millennials use an online travel agency to book accommodations for beach vacations.
- **Over 3 in 10** millennials prefer to book accommodations directly with the hotel.
- **Nearly 1 in 4** millennials use Airbnb to book accommodations.



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

# COMPANIONS TO WALTON COUNTY

- Over 7 in 10 millennials would take their partner or spouse on a Walton County vacation.
- Nearly half of millennials would take their children under 20 on vacation to Walton County.



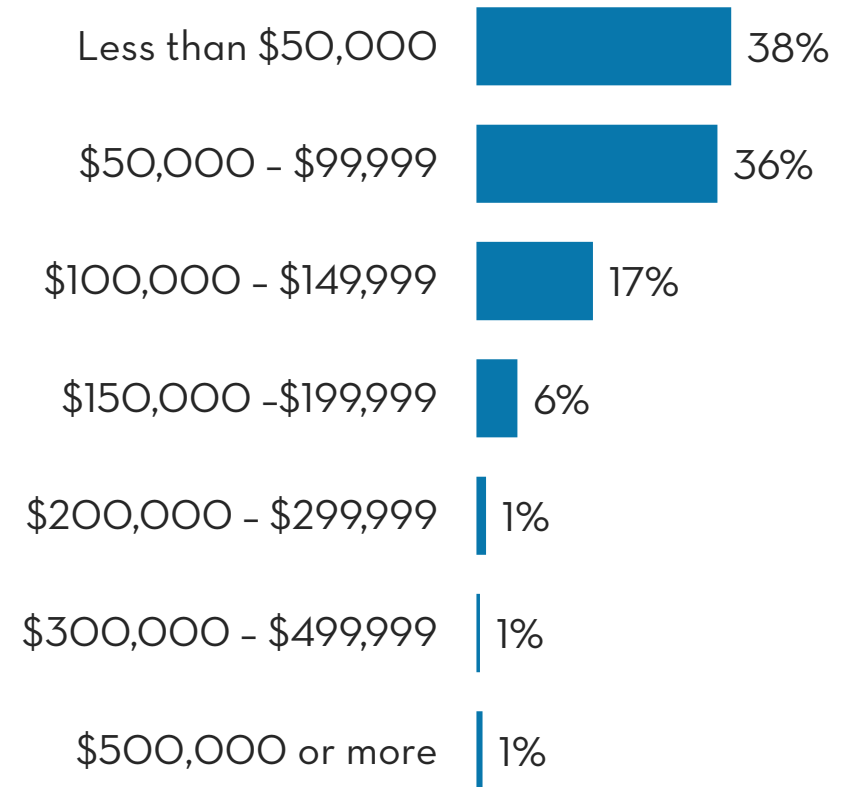
<sup>1</sup>Multiple responses permitted.

# DEMOGRAPHICS

# MILLENNIAL HOUSEHOLDS

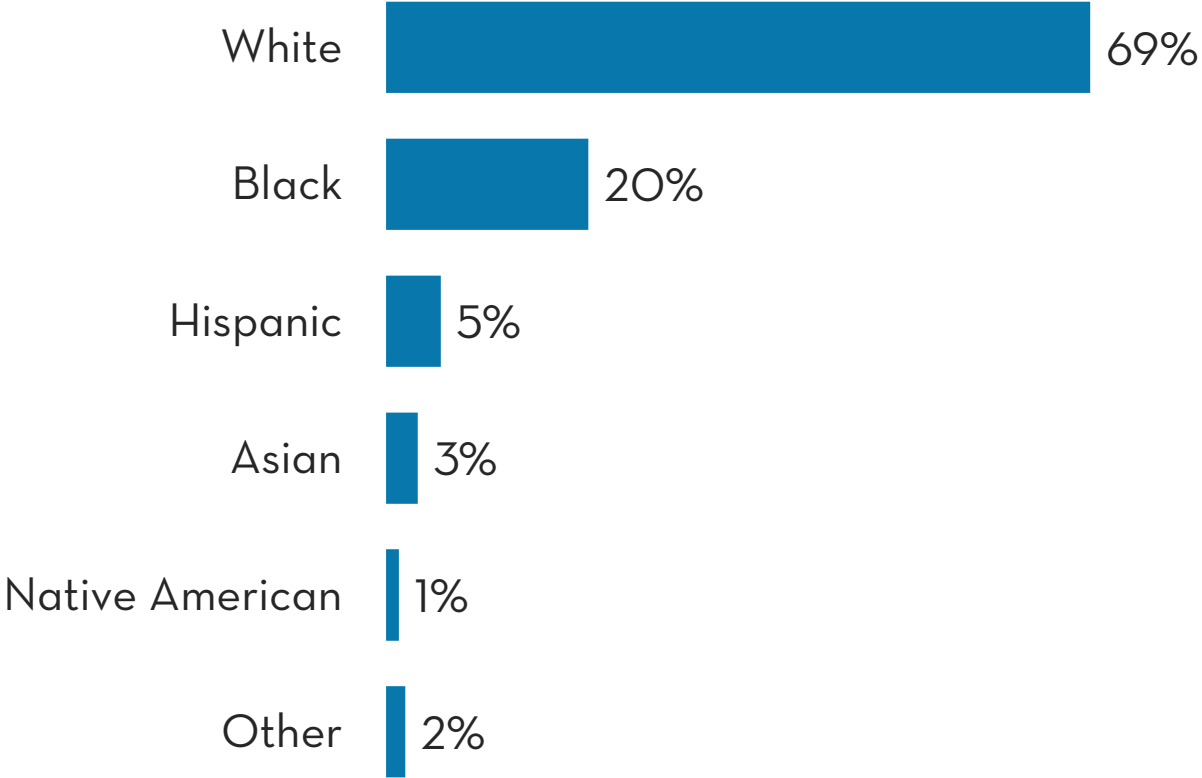
- **3.2** is the average number of people in a millennial household.
- **1.4** is the average number of children in a millennial household.

## Household Income

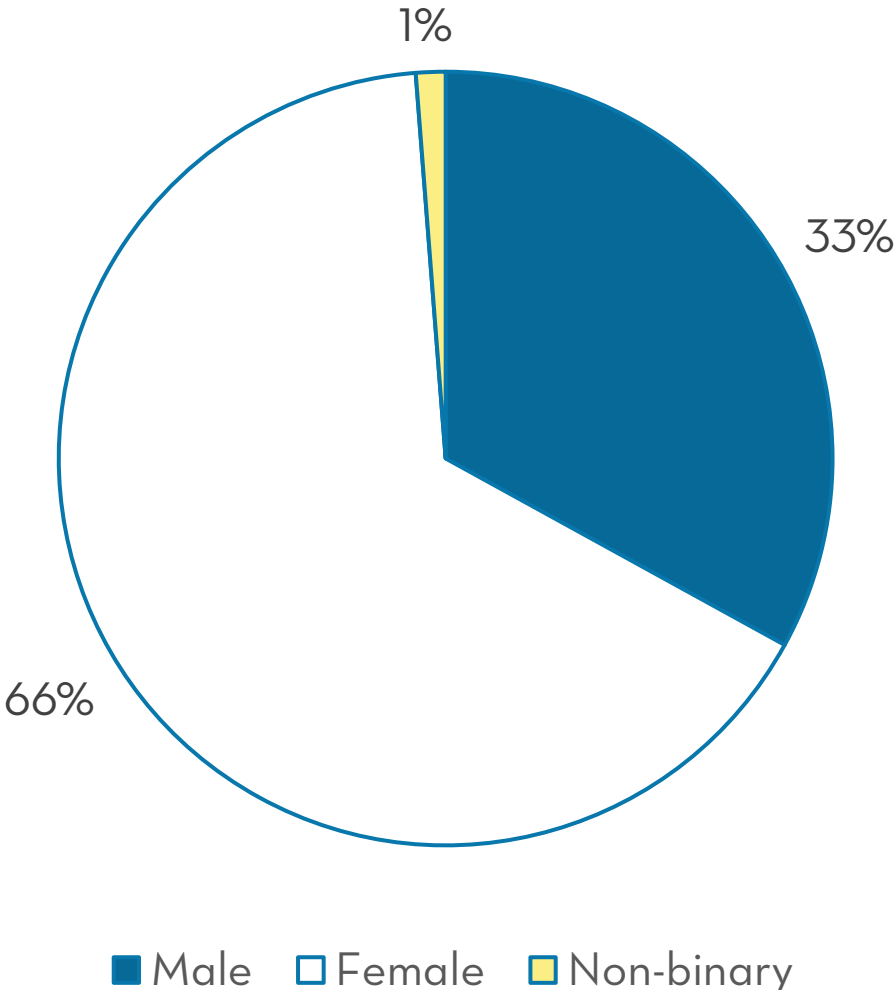


<sup>1</sup>Multiple responses permitted.

# ETHNICITY/RACE



# GENDER<sup>1</sup>



<sup>1</sup>Since women are more likely to make vacation decisions, more women were interviewed.

# Walton County Tourism

**Millennial Study**  
October 2022

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