

VISIT SOUTH WALTON

Visitor Tracking Study

Summer 2019



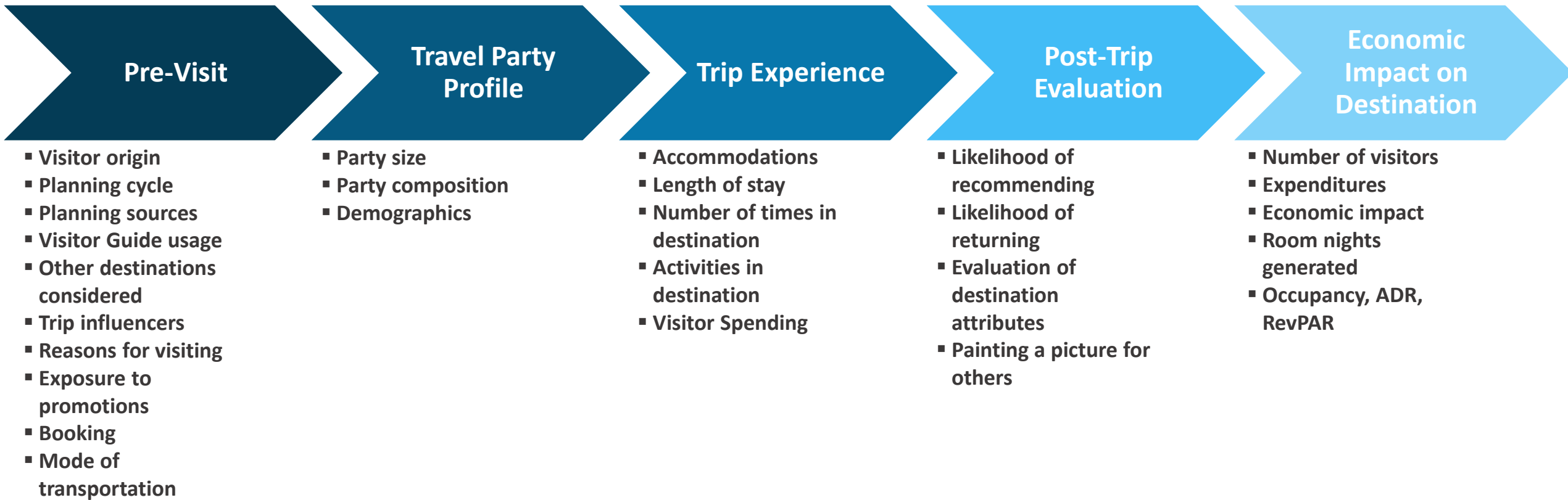
Phillip Downs, Ph.D
Joseph St. Germain, Ph.D
Rachael Anglin
Isiah Lewis
Glencora Haskins

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
Economic impact	72



STUDY OBJECTIVES: MAP THE VISITOR JOURNEY



Visitor Tracking Study

Visitor tracking is completed through internet surveys and in-person interviewing in public areas in South Walton, including beaches, towns and events.

This report is based on interviews with 886 randomly selected Summer visitors who traveled to South Walton between June and August 2019.

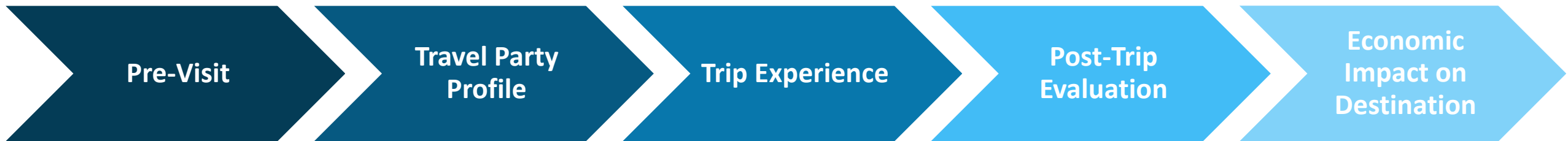
*Interviews are with out-of-county guests who stay at properties/vacation rentals at beach communities across South Walton, and at various locations along the beaches. 146 interviews were conducted via face-to-face interviews along the beach and in public areas.

EXECUTIVE SUMMARY



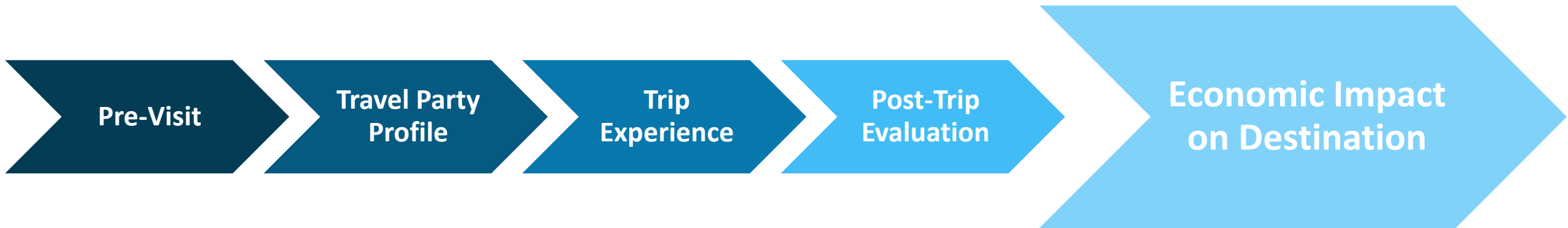
VISITOR JOURNEY: ECONOMIC IMPACT

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 – SUMMER 2018 VS. 2019

An increase in active units from Summer 2018 to Summer 2019, coupled with increases in occupancy and ADR led to an increase in TDT of 4.1%.

Numbers of visitors were up 7.4%, which resulted in direct spending being up 13.8%.

With occupancy slightly up and ADR up modestly, RevPAR was up 4.3% despite the inventory increase.

Property Statistics	Summer 2018	Summer 2019	% Change
Room nights	984,300	1,046,108	+6.3%
Total visitors	2,040,600	2,191,600	+7.4%
TDT collections	\$13,415,176	\$13,966,726	+4.1%
Direct spending	\$1,239,598,200	\$1,410,662,752	+13.8%
Economic impact	\$1,834,605,300	\$2,087,780,872	+13.8%
Occupancy	80.1%	80.7%	+0.7%
Room rates	\$381.21	\$394.42	+3.5%
RevPAR	\$305.31	\$318.30	+4.3%

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

ECONOMIC IMPACT - LODGING STATISTICS

80.7%

Occupancy

↑ 0.7%

\$394.42

ADR

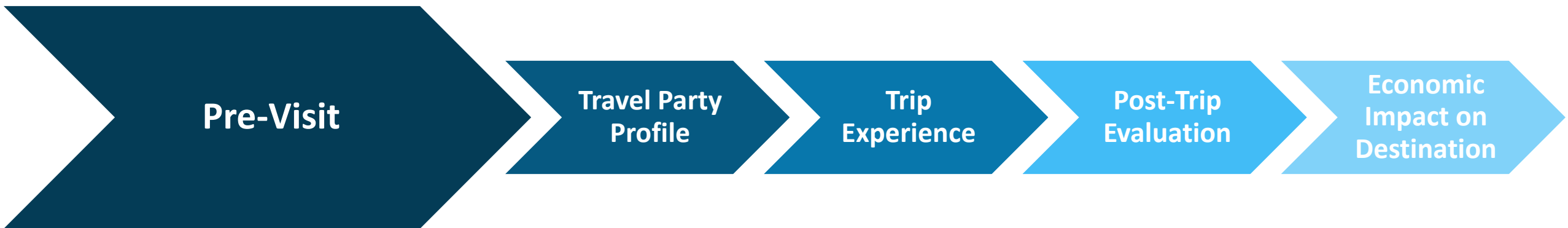
↑ 3.5%

\$318.30

RevPAR

↑ 4.3%

VISITOR JOURNEY: PRE-VISIT



PLANNING CYCLE

- » **1 in 2** visitors plan a Summer South Walton vacation at least 4 months in advance
- » **1 in 10** considered vacationing at a beach outside of South Walton



TRIP PLANNING SOURCES*



Friends, family

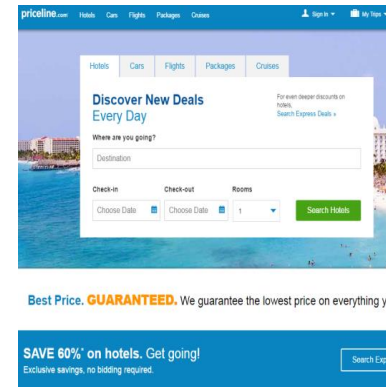
Search engines



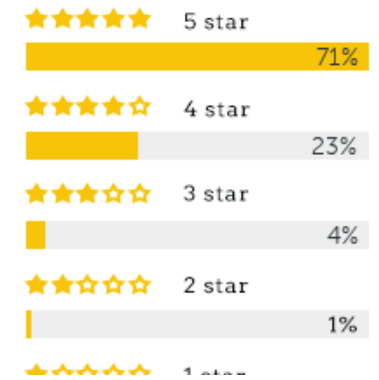
Website for 1 of the 16 beach neighborhoods



Travel websites



Online travel reviews, blogs



SOUTH WALTON VISITOR GUIDE

- » **19%** of visitors viewed the South Walton Visitors Guide before going to South Walton
- » Visitors Guide received a rating of **7.3 out of 10¹**



¹10 = Extremely useful; 1 = Not at all useful

TOP REASONS FOR VISIT*

Family vacation (**80%**)



Relax and unwind (**55%**)



Annual routine (**25%**)



Special occasion (**10%**)



*Multiple responses permitted

SOUTH WALTON PROMOTIONS

- » **32%** of visitors have recently seen, read or heard promotions about South Walton
- » This information influenced **6%** of visitors to visit South Walton

Magazine article



Social media



Magazine Ad



Website Ad



TOP BOOKING SOURCES

Vacation Rental Company (**49%**)

ROSEMARY
BEACH
COTTAGE RENTAL COMPANY

HOMEOWNER'S
COLLECTION
Seaside, Florida

NEWMAN-DAILEY
RESORT PROPERTIES, INC.

Hotel/condo (**28%**)

Residence
Inn[®]
Marriott

Sandestin[®]
Golf and Beach Resort

THE
PEARL
hotel • dining • spa

VRBO, Homeaway (**14%**)

HomeAway[®]

VRBO[®]
from HomeAway[®]

VacationRentals.com[™]
Part of the HomeAway Family

VISITOR TRANSPORTATION

- » **84%** of visitors drove to South Walton
- » **16%** who flew used the following airports:

46%
Northwest Florida Beaches
International Airport



40%
Destin-Ft. Walton Beach
Airport



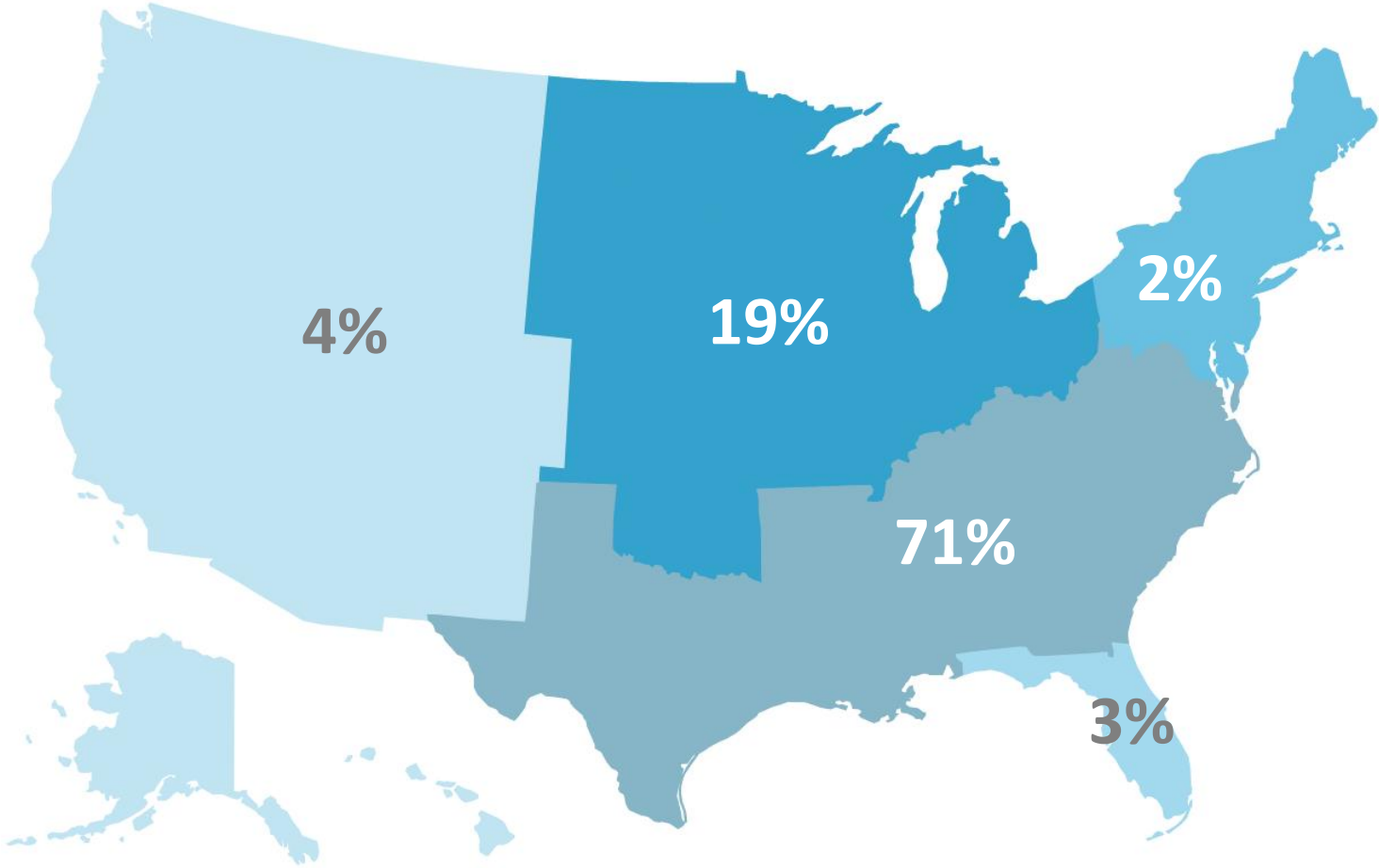
7%
Pensacola International
Airport



VISITOR JOURNEY: TRAVEL PARTY PROFILE

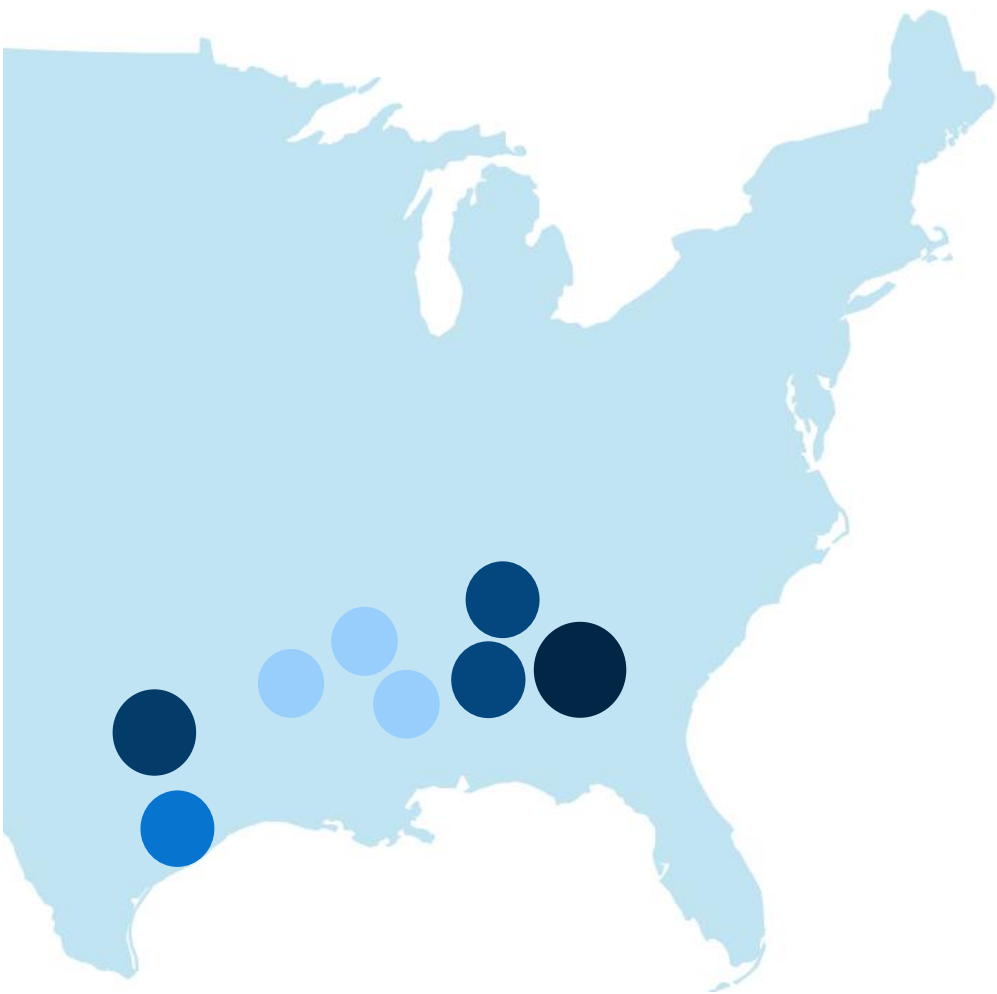


ORIGIN OF SUMMMER VISITORS



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

ORIGIN OF SUMMER VISITORS



- 10% ● Atlanta
- 9% ● Dallas – Ft. Worth
- 6% ● Nashville
- 6% ● Birmingham
- 4% ● Houston
- 3% ● Jackson
- 3% ● Memphis
- 3% ● Little Rock

TRAVEL PARTY SIZE AND COMPOSITION

The typical visitor traveled in a party composed of **5.4** people



67% 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 (**60%**)
 - » Median household income of **\$177,300**
 - » From the Southeast (**74%**)

VISITOR PROFILE: TYPICAL VACATIONER¹



→The typical Vacationer¹ Visitor:

→Is **51** years old

→Has a median household income of
\$180,000

→Is female (**60%**)

→**63%** travel with children

→**84%** drive to the area

→Is from:

→Southeast (**75%**)

→Midwest (**17%**)

¹Travel parties who stayed 1-10 nights.

VISITOR PROFILE: TYPICAL LONG-TERM¹ VISITOR

→ The typical Long-Term¹ Visitor:

→ Is **72** years old

→ Has a median household income of
\$227,600

→ Is female (**56%**)

→ **56%** travel with children

→ **89%** drive to the area

→ Is from:

→ Midwest (**44%**)

→ Southeast (**39%**)



¹Travel parties who stayed more than 10 nights.

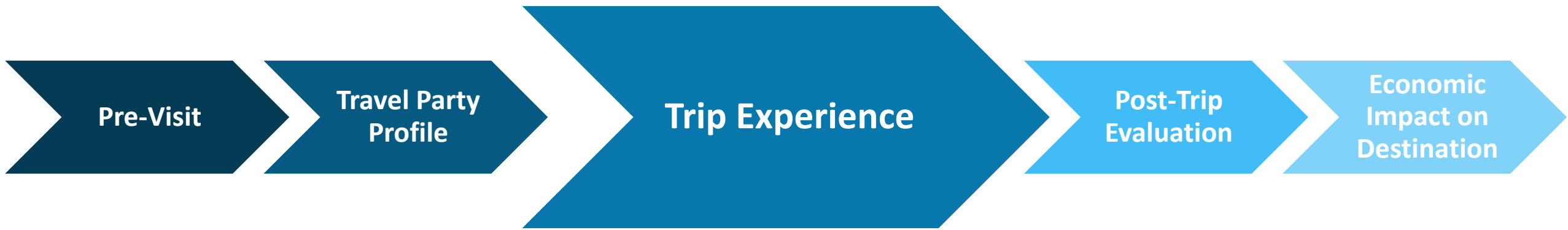
VISITOR PROFILE: TYPICAL DAY TRIPPER

» The typical Day Trip Visitor:

- » Is **53** years old
- » Has a median household income of **\$92,400**
- » Is female (**67%**)
- » **42%** travel with with children
- » **75%** drive to the area
- » Is from:
 - » Southeast – not including FL (**44%**)
 - » Midwest (**33%**)
 - » Florida (**22%**)



VISITOR JOURNEY: TRIP EXPERIENCE



ACCOMMODATIONS

73% Condos, rental houses, etc.



9% Hotels



7% Personal condo



TOP VISITOR ACTIVITIES*

Beach (96%)



Restaurants (92%)



Relax and unwind (88%)



Family time, reading,
cooking (79%)



Shopping, antiques (75%)



LENGTH OF STAY

- » Visitors spent **6.1*** nights in South Walton



*Visitors who stayed 30 or fewer nights.

FIRST – TIME AND EXPERIENCED VISITORS

- » **16%** were first-time visitors
- » **37%** had visited more than 10 times



VISITOR EXPENDITURES*

- » Visitors spent **\$1,009** a day
- » Visitors spent **\$6,184** on their trip



*Visitors staying in paid accommodations.

VISITOR JOURNEY: POST TRIP EVALUATION



VISITOR SATISFACTION

- » Visitors gave South Walton a rating of **9.2¹** as a place to vacation
- » **96%** will return to South Walton²

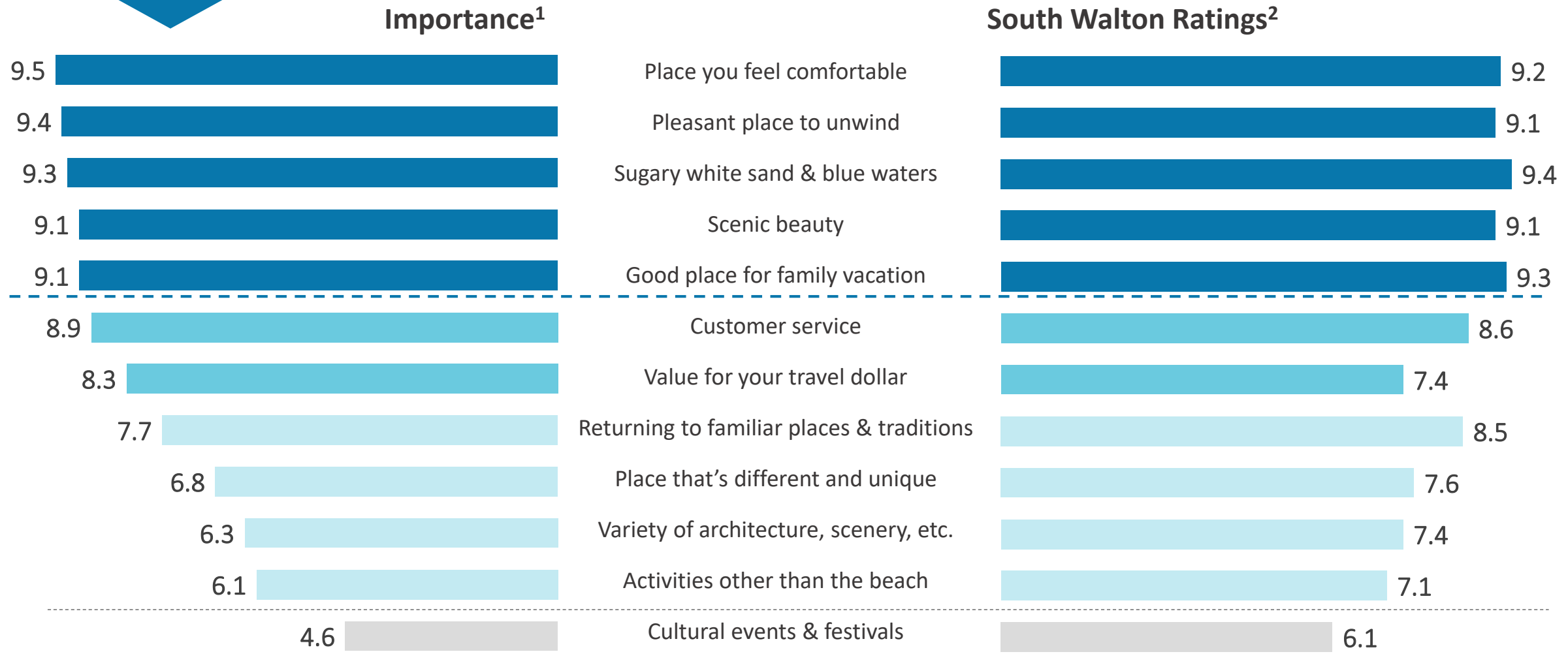


¹10 = Excellent; 1 = Poor

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

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

VACATION ATTRIBUTE IMPORTANCE VS. RATINGS



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

²Rated on a scale from 1 to 10 where 10 is excellent and 1 is poor.

VISITOR DESCRIPTIONS OF SOUTH WALTON

Great place to visit (**83%**)

“South Walton is the best place to vacation because you can do nothing on the beach or explore all the area has to offer from unique state parks, shopping, festivals, or local business activities.”

Beautiful beaches (**54%**)

“The most beautiful beaches in the country. Powdery white and turquoise waters that were Caribbean warm.”

Family friendly (**21%**)

“Beautiful, family friendly beach with a great community feel. Super easy to get around, convenient.”

EMOTIONS ASSOCIATED WITH SOUTH WALTON*



*Coded verbatim responses; multiple responses permitted.

YEARLY COMPARISONS



VISITOR PROFILE – SUMMER 2018 VS. 2019

Visitor Metrics ¹	Summer 2018	Summer 2019
Travel party	6.2	5.4
Kids <20	70%	67%
Median age	51	52
Estimated median household income	\$177,800	\$177,300
Stayed in condo/rental house	76%	73%
Drove	83%	84%
Nights spent	6.2	6.1
Direct expenditures (travel party for entire trip)	\$5,853	\$6,184
1 st time visitor	17%	16%
10+ visits to South Walton	37%	37%

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

VISITOR PROFILE – SUMMER 2018 VS. 2019

Top Origin States	Summer 2018	Summer 2019
Texas	18%	17%
Georgia	13%	12%
Alabama	11%	11%
Tennessee	10%	11%
Louisiana	6%	6%
Origins - Regions	Summer 2018	Summer 2019
Southeast	76%	74%
Northeast	3%	2%
Midwest	18%	19%
West	2%	4%
International	1%	1%

VISITOR PROFILE – SUMMER 2018 VS. 2019

Top Visitor Activities	Summer 2018	Summer 2019
Beach	98%	96%
Restaurants	93%	92%
Relax and unwind	90%	88%
Family time, reading, cooking, etc.	81%	79%
Shopping, antiques	73%	75%
Biking, running, etc.	49%	40%
Water sports such as boating, kayaking, SUP	40%	32%
Bars, nightclubs	24%	25%
Attractions	25%	24%
Golf or tennis	13%	17%
Special events	12%	14%
Hiking, nature walks, bird watching, eco tours	16%	12%
State parks	14%	11%
Art galleries, museums, cultural events	9%	9%
Dune Lakes	9%	7%

VISITOR PROFILE – SUMMER 2018 VS. 2019

Visitor Metrics	Summer 2018	Summer 2019
Will return to South Walton	94%	96%
Rating for overall experience ¹	9.2	9.2 ¹
Viewed Visitors Guide	20%	19% ²
Planned trip	4 – 6+ months out (56%)	4 – 6+ months out (52%)
Used VisitSouthWalton.com	18%	17%
Used 1 of 16 beaches' websites	34%	34%

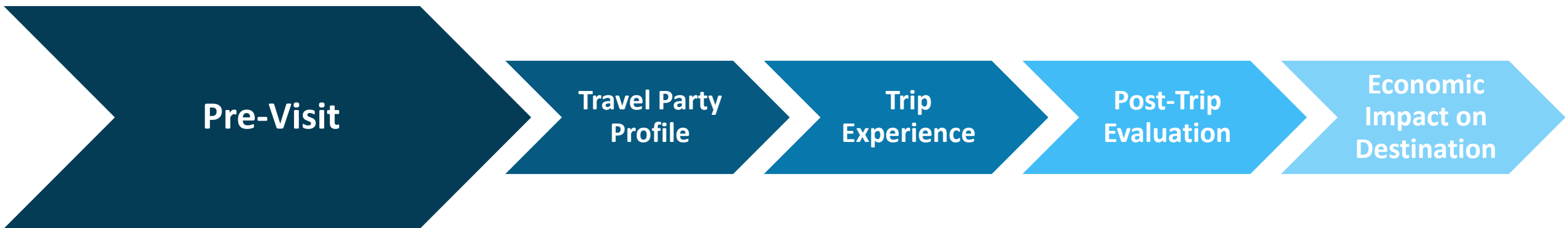
¹10-point scale with 10=Excellent & 1=Poor.

²16% used the online version & 3% used the print version.

DETAILED FINDINGS



VISITOR JOURNEY: PRE-VISIT



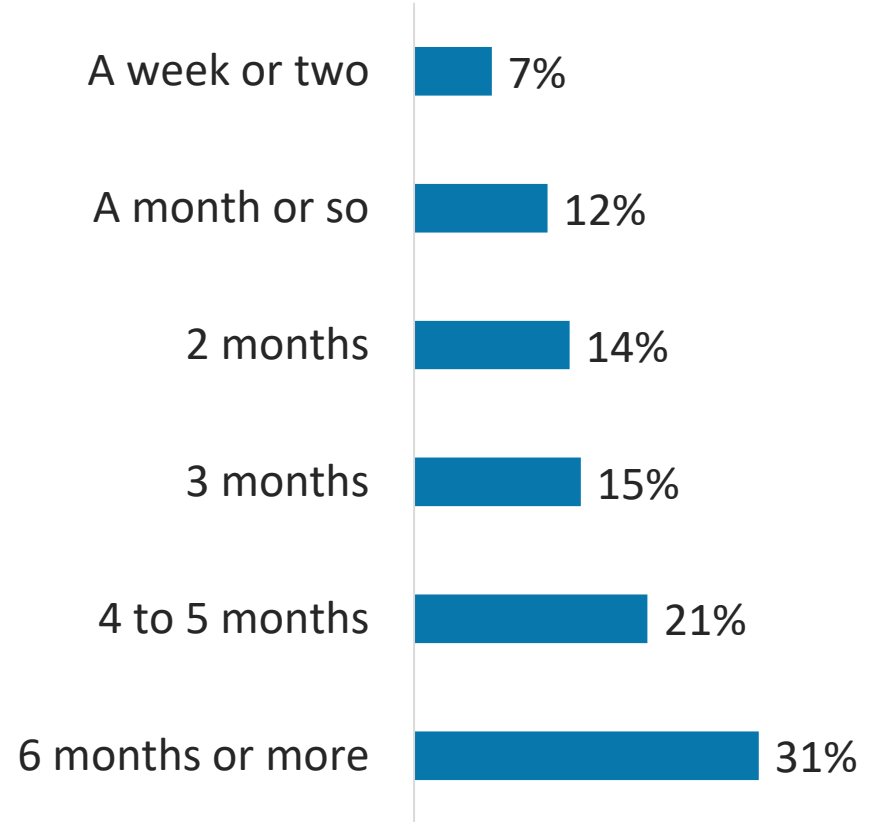
PLANNING CYCLE



Over **1 in 2** visitors plan a Summer South Walton vacation at least **4 months out**.

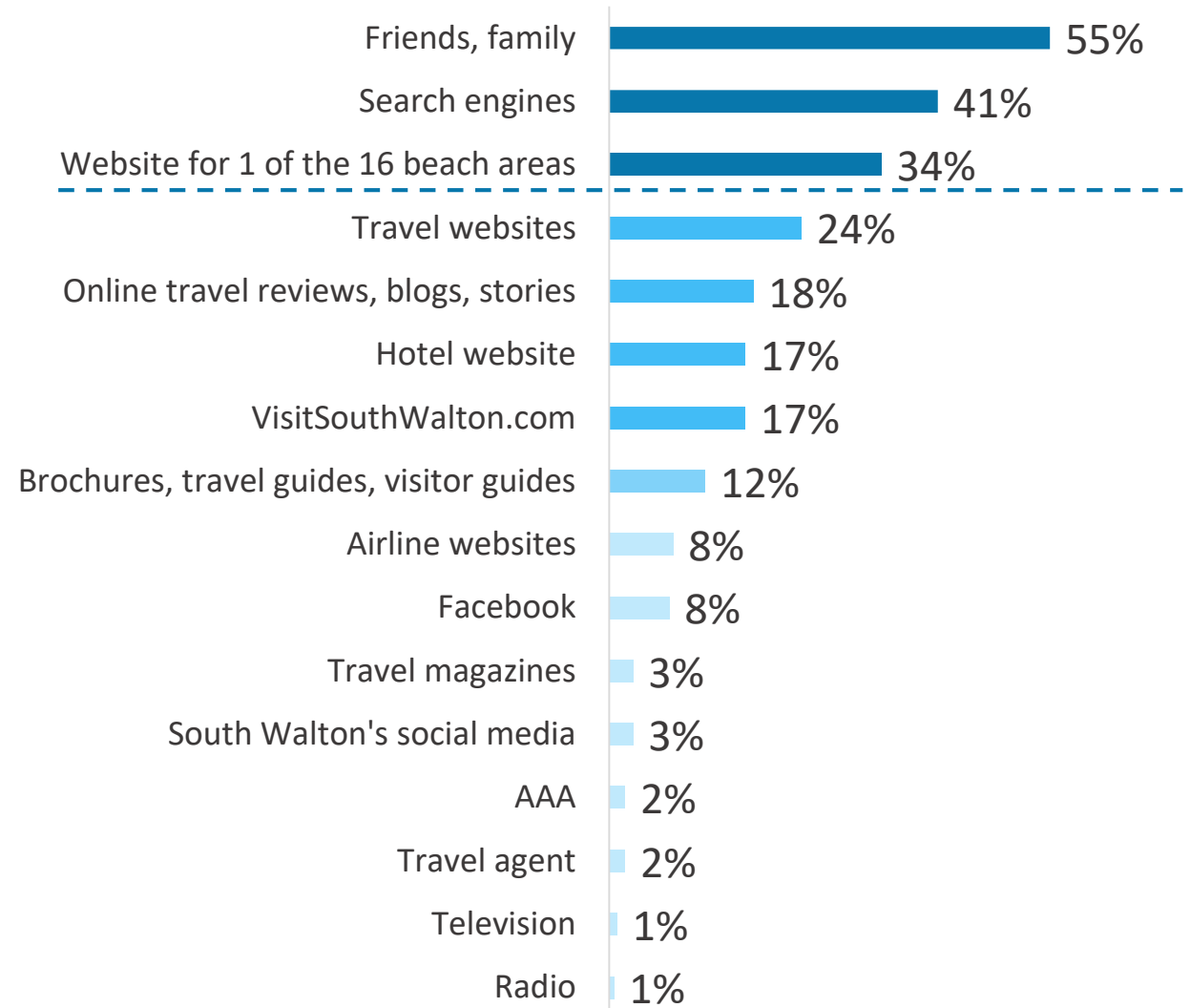


Relatively few visitors to South Walton have **a short (a month or less) planning cycle**.



PLANNING SOURCES¹

Over **half** of visitors used friends and family to help plan their trip to South Walton.



¹Multiple responses permitted.

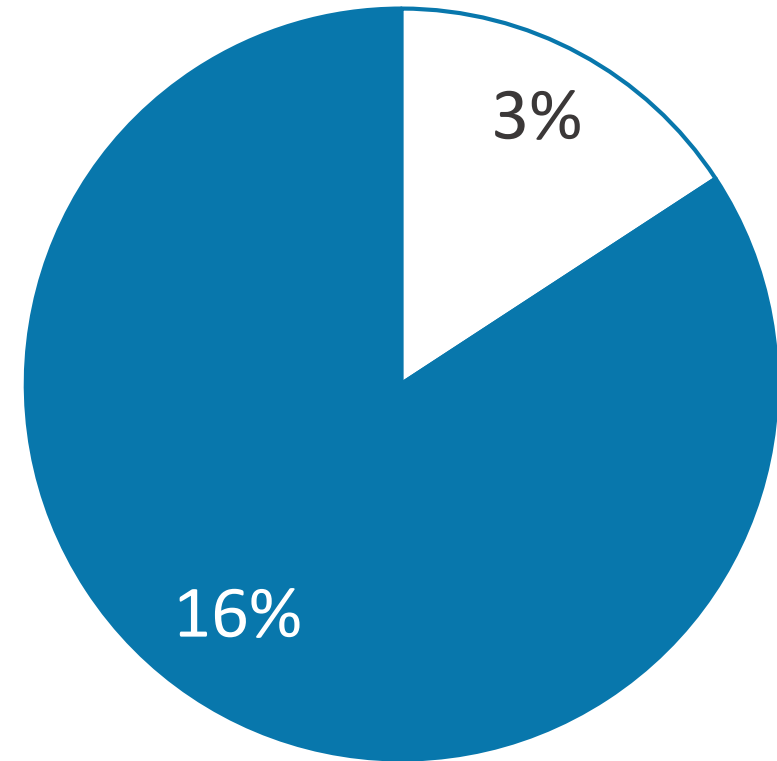
SOUTH WALTON VISITOR GUIDE



19% of visitors viewed a South Walton Visitors Guide before going to South Walton.



Visitors Guide received a rating of **7.3 out of 10¹**.



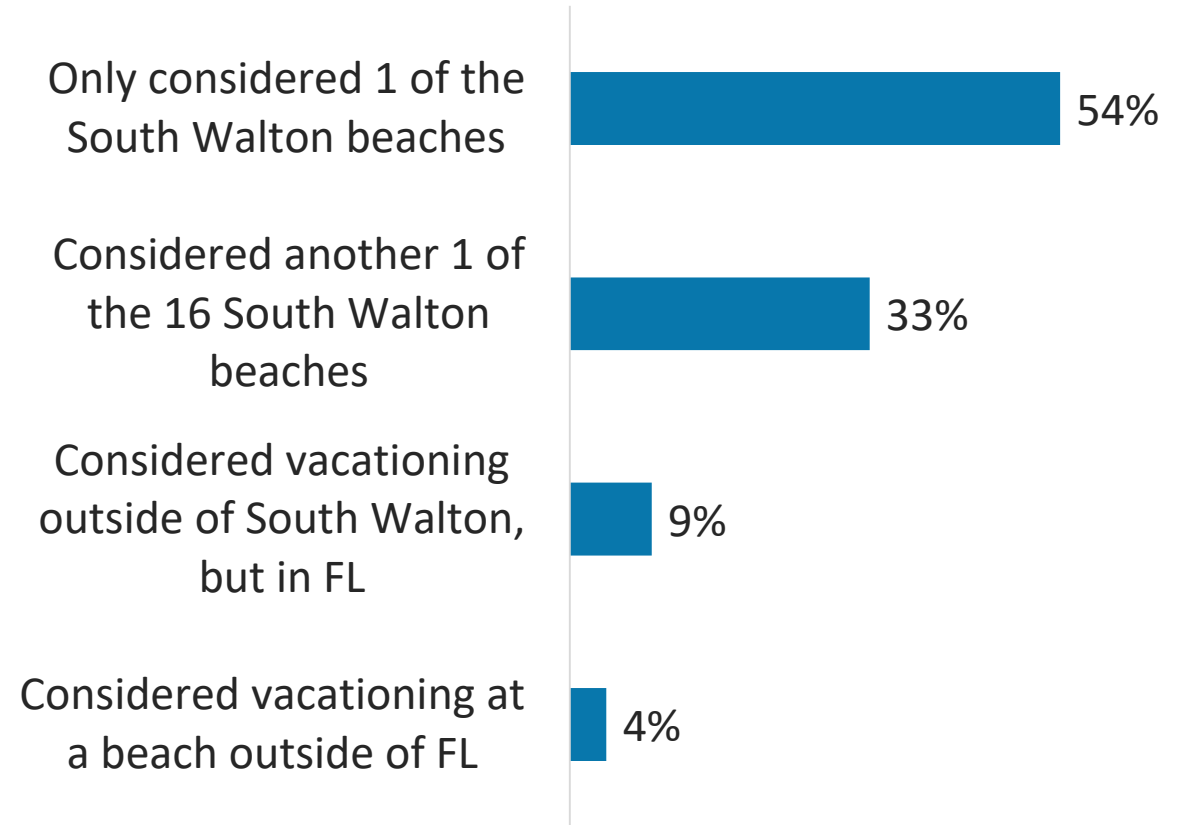
□ Print version ■ Online version

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

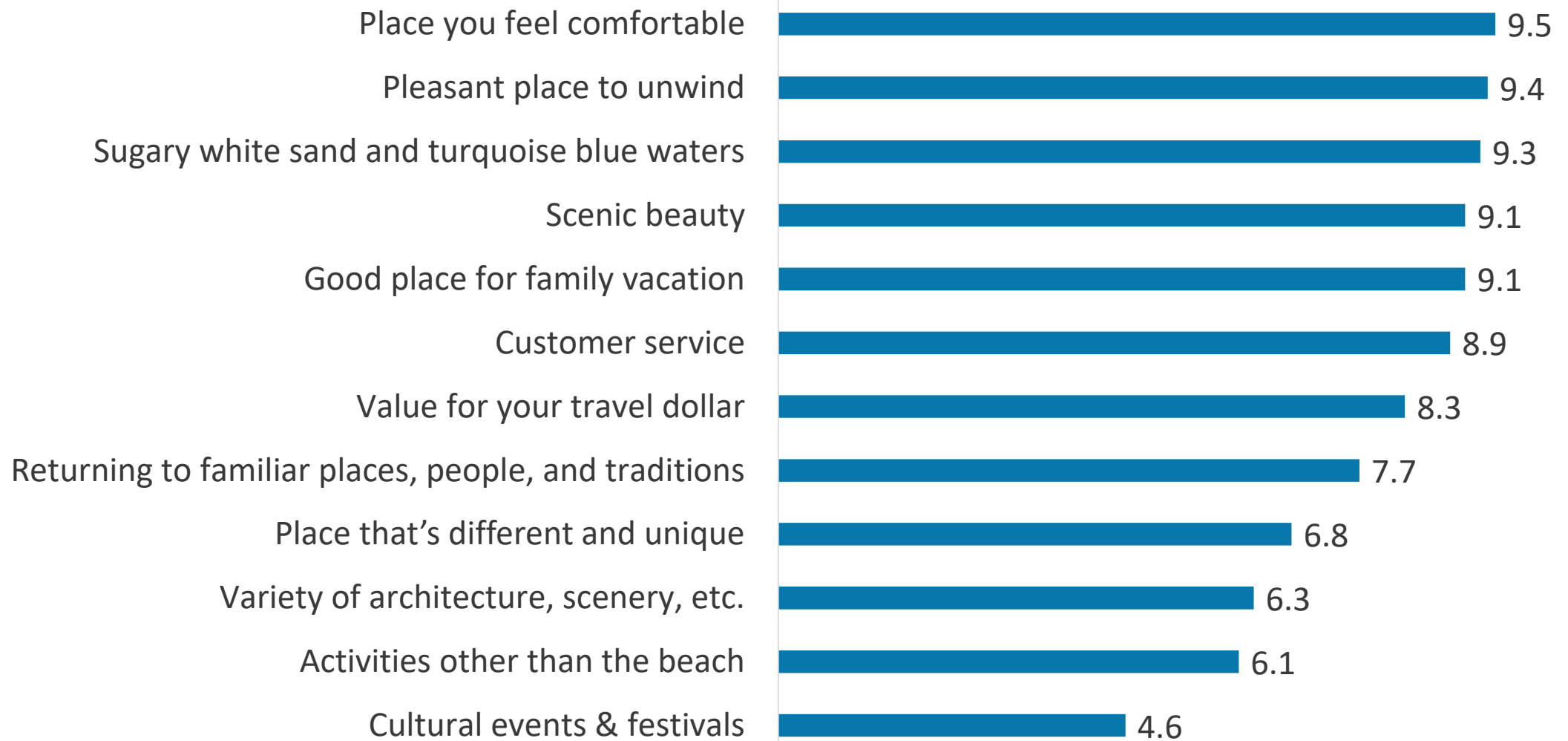
OTHER DESTINATIONS CONSIDERED



Only **1 in 10** visitors considered vacationing at a beach outside of South Walton.

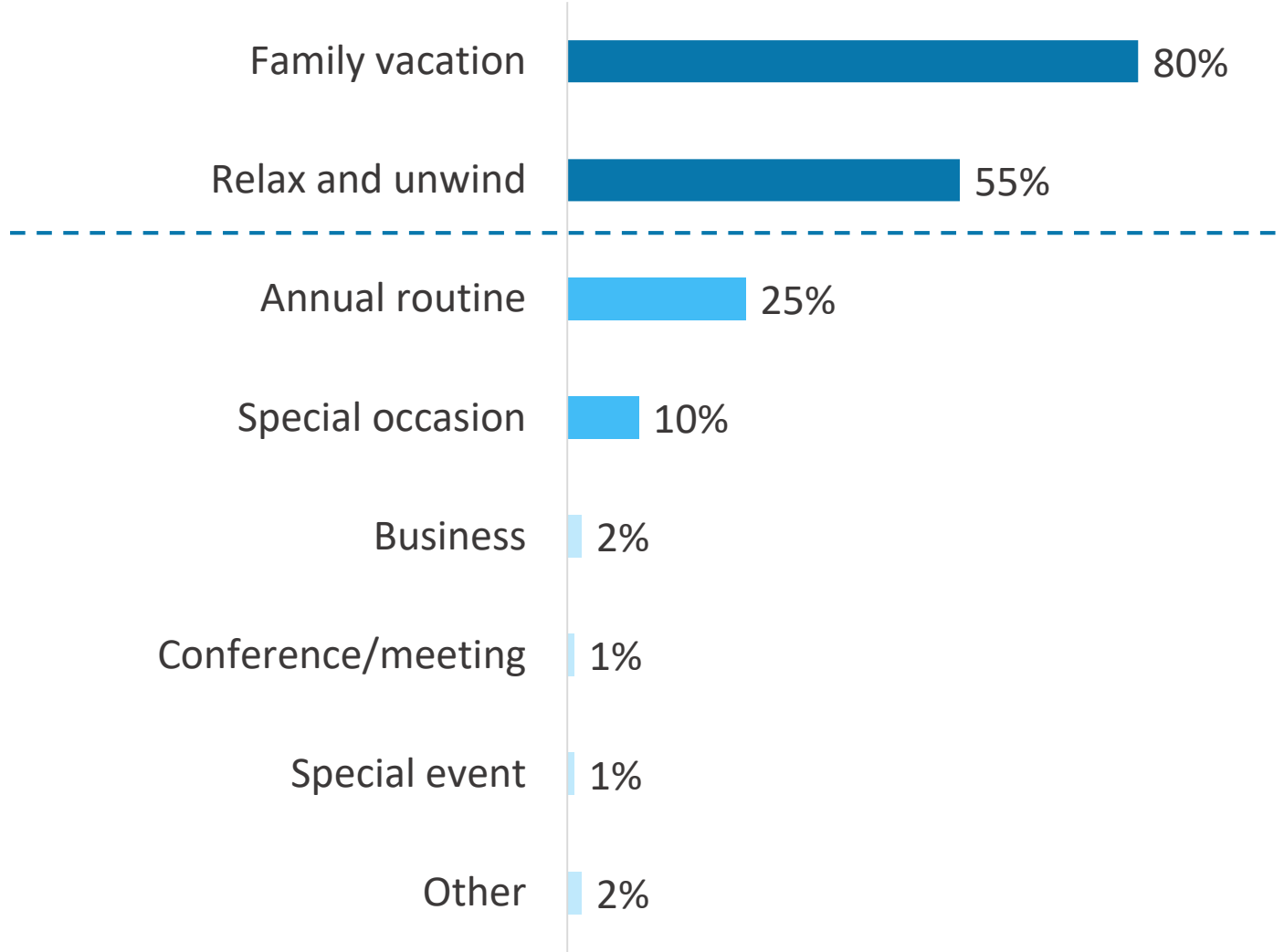


IMPORTANT VACATION DESTINATION ATTRIBUTES¹



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

REASONS FOR VISITING¹



¹Multiple responses permitted.

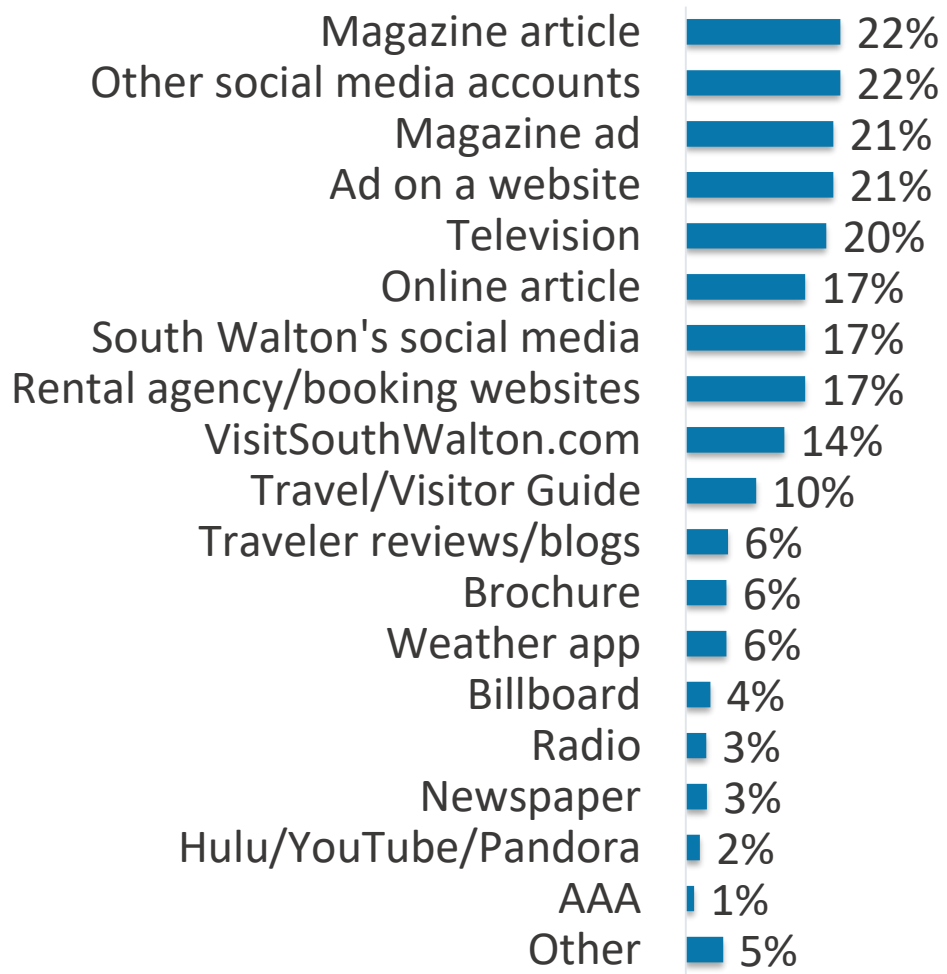
SOUTH WALTON PROMOTIONS¹



32% of Summer visitors have recently seen, read or heard advertising, promotions or travel stories about South Walton.

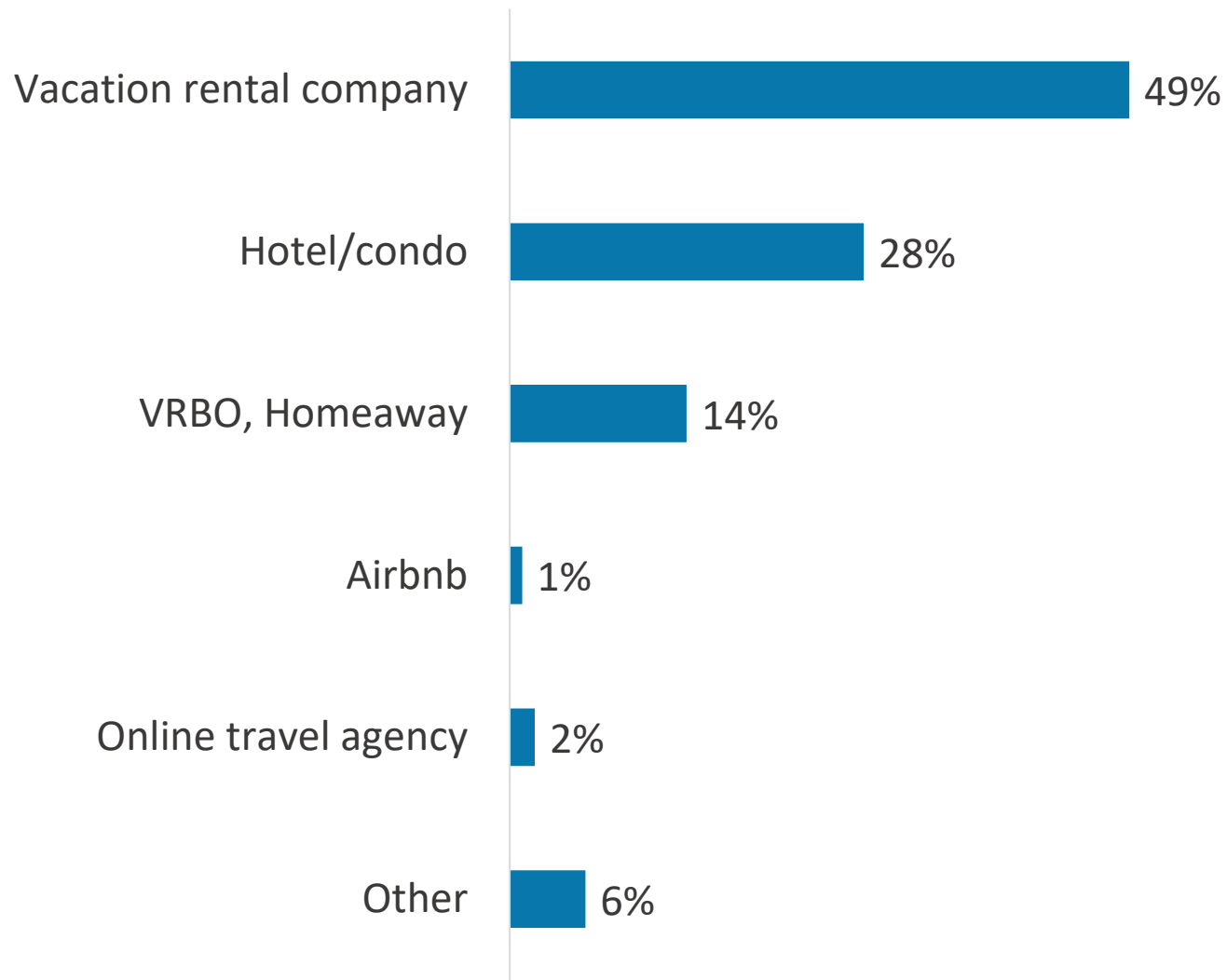


This information influenced **6%** of visitors to visit South Walton.



¹Multiple responses permitted.

BOOKING ACCOMMODATIONS

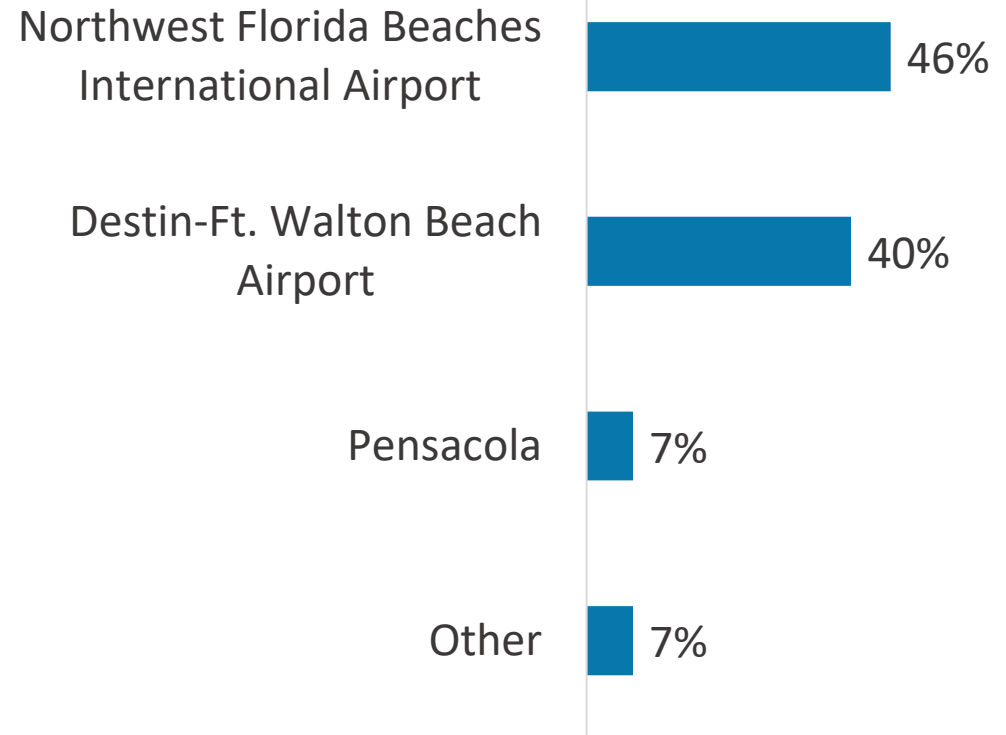


VISITOR TRANSPORTATION

84% of Summer visitors drove to South Walton.

34% of those who drove were aware that there were direct flights from their city to the South Walton area.

16% who **flew** used the following airports:

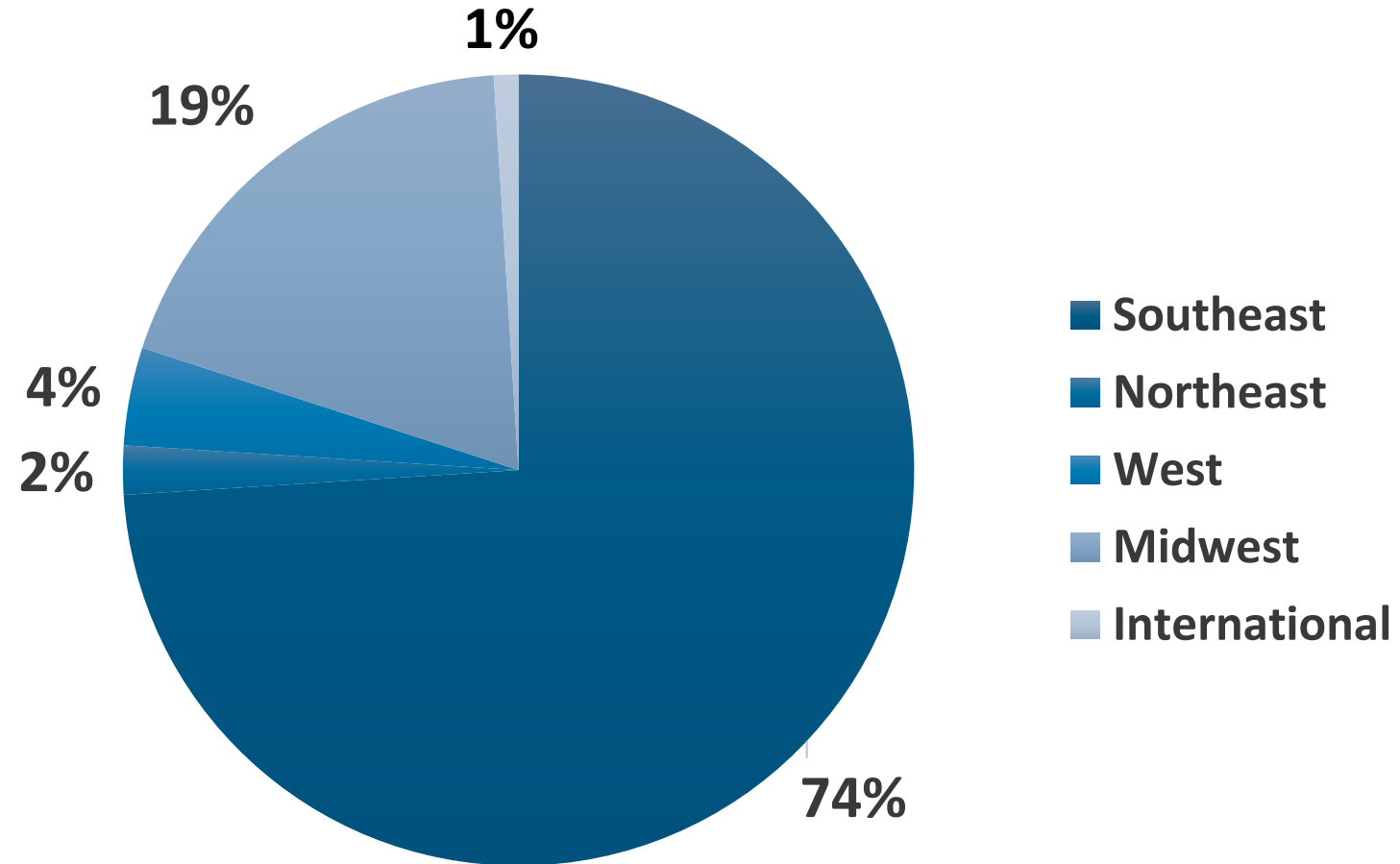


VISITOR JOURNEY: TRAVEL PARTY PROFILE



ORIGIN OF SUMMMER VISITORS

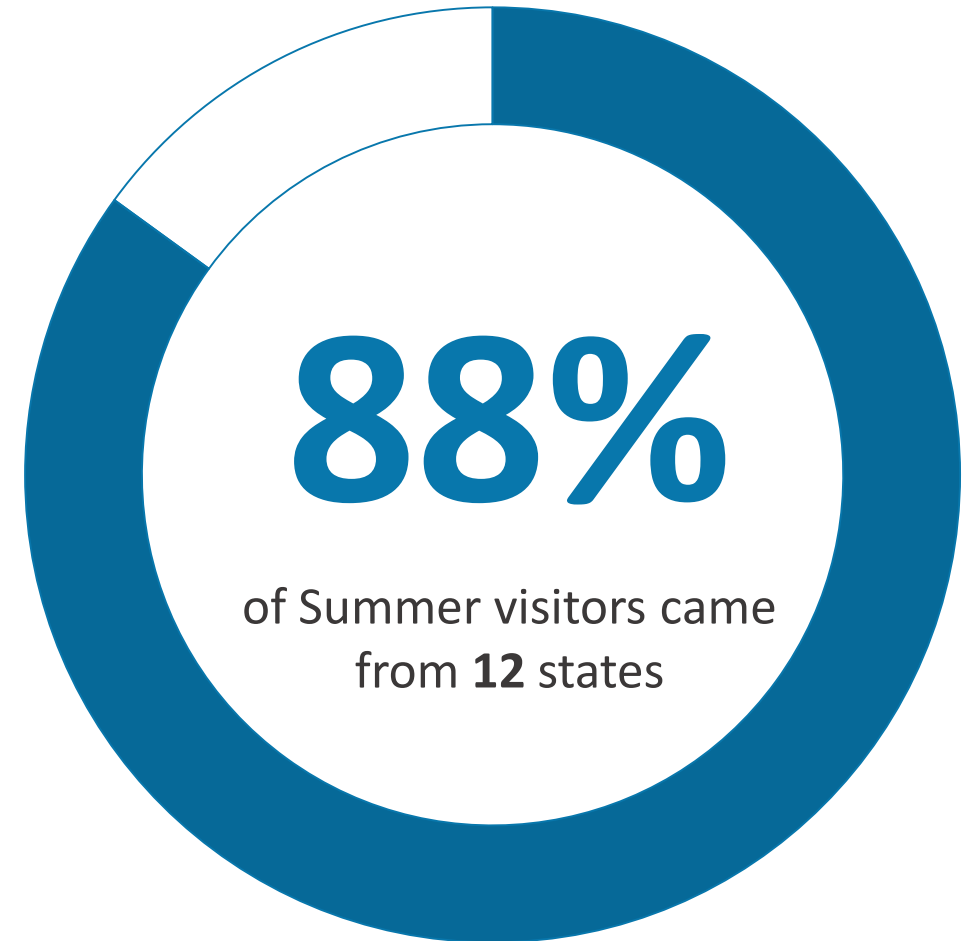
Top Origin Markets	% of Visitors
Atlanta	10%
Dallas-Ft. Worth	9%
Nashville	6%
Birmingham	6%
Houston	4%
Jackson	3%
Memphis	3%
Little Rock	3%
St. Louis ¹	2%
Chattanooga	2%
New Orleans	2%
Cincinnati	2%
Baton Rouge	2%
Montgomery	2%
Kansas City	2%
Oklahoma City	2%
Tulsa	2%



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

ORIGIN OF SUMMMER VISITORS

State	Percentage of Visitors
Texas	17%
Georgia	12%
Alabama	11%
Tennessee	11%
Louisiana	6%
Mississippi	5%
Arkansas	5%
Kentucky	5%
Ohio	4%
Oklahoma	4%
Missouri	4%
Florida	4%



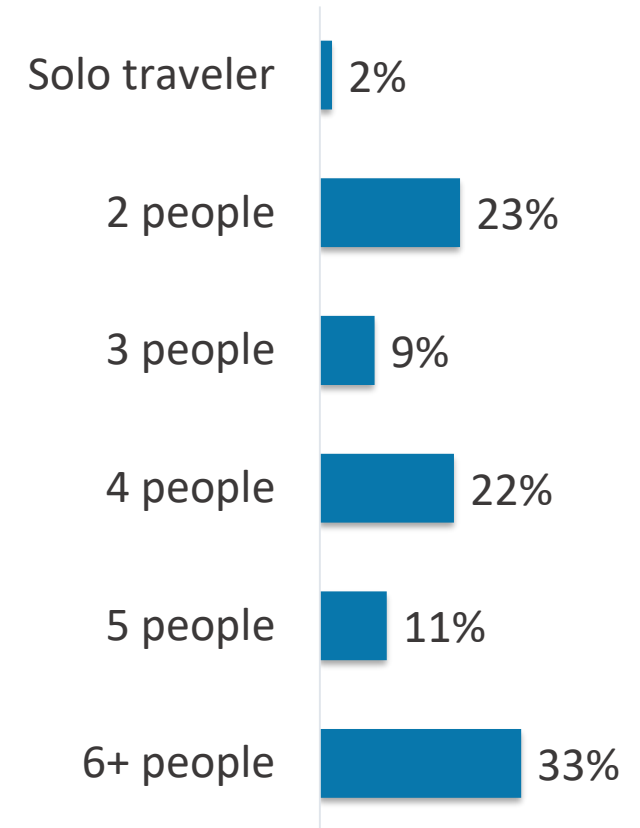
TRAVEL PARTY SIZE AND COMPOSITION



Visitors traveled in a party composed of **5.4** people.



67% of visitors traveled with children under the age of 18.

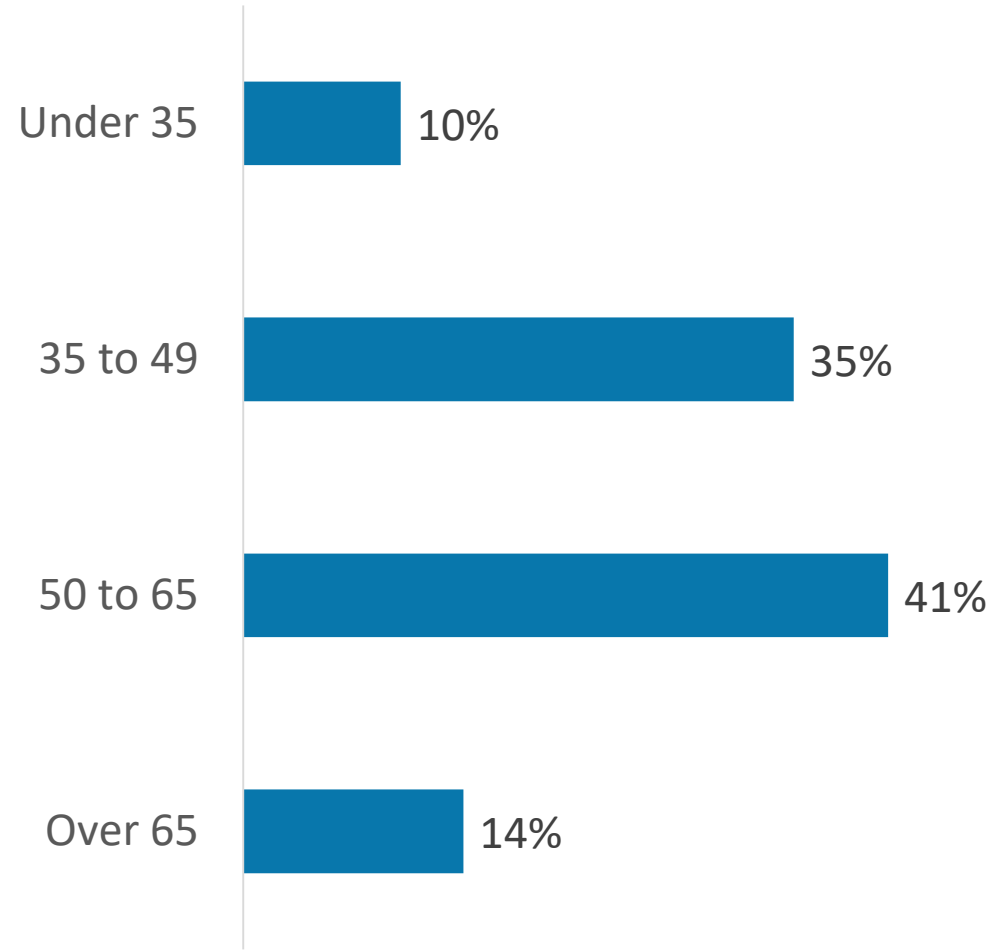


¹Multiple responses permitted.

AGE OF SUMMMER VISITORS

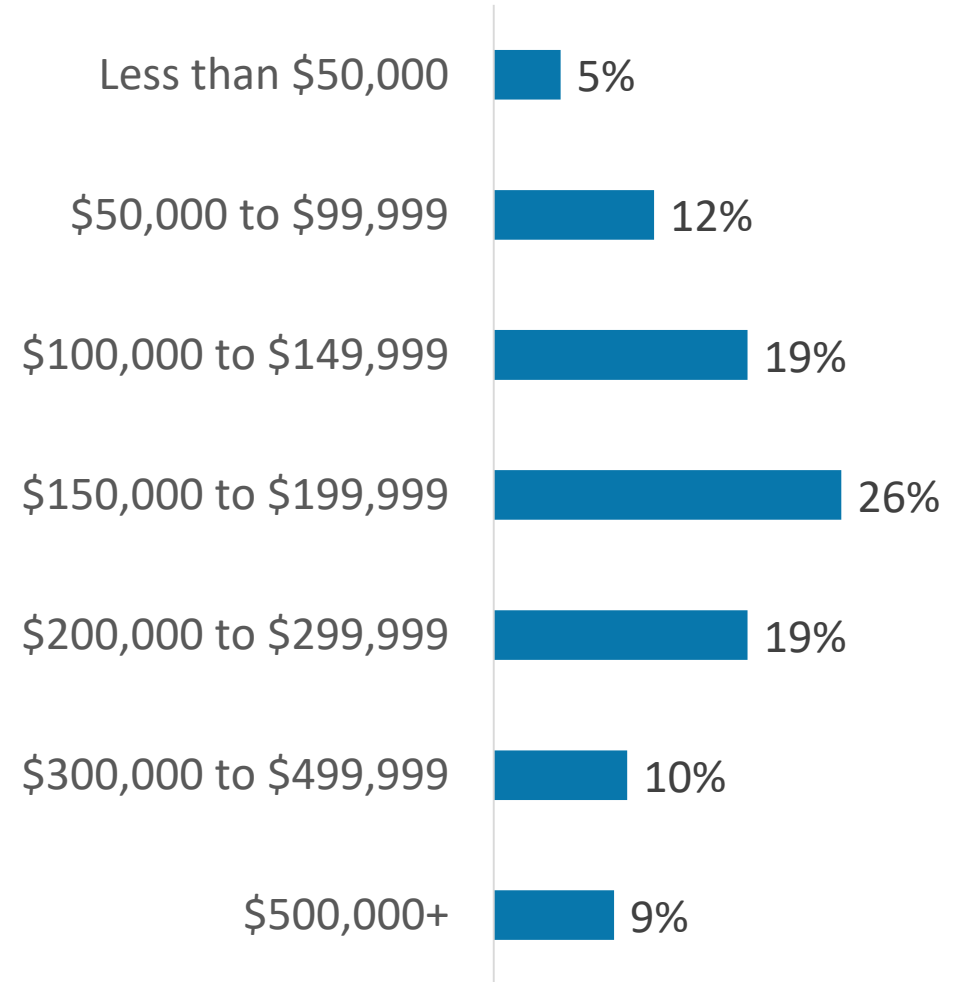


Median age of Summer visitors was **52 years old.**

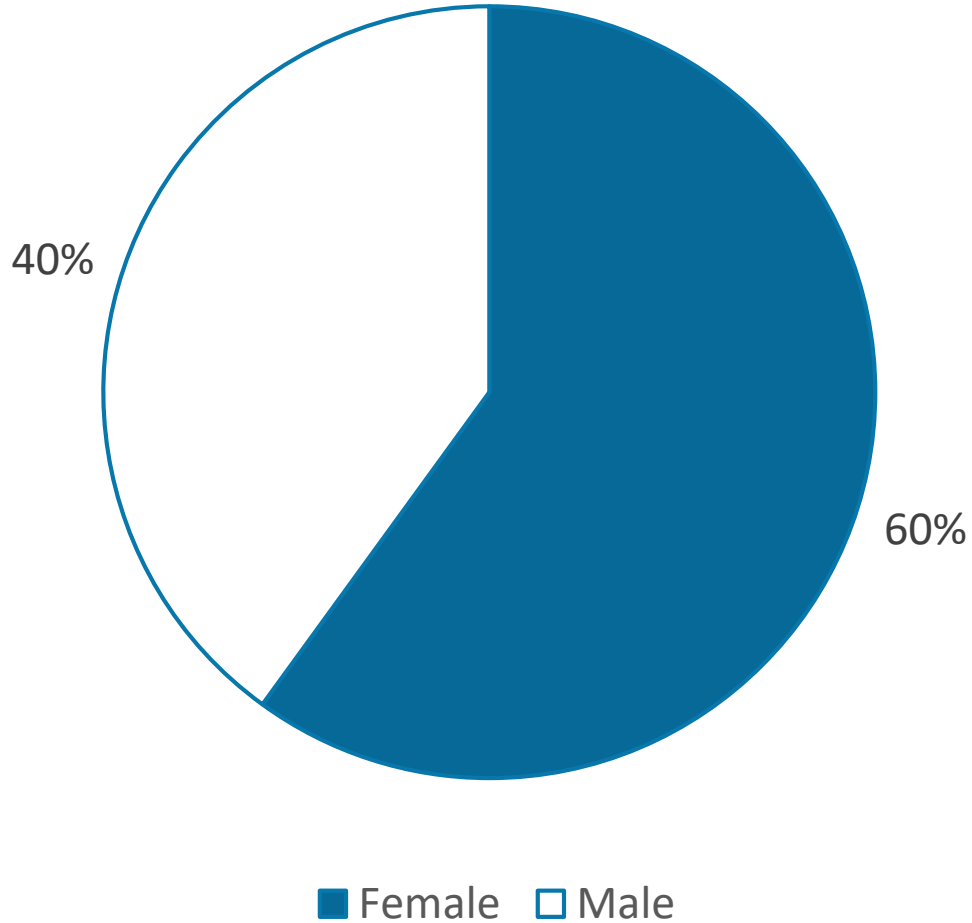


TOTAL HOUSEHOLD INCOME IN 2018

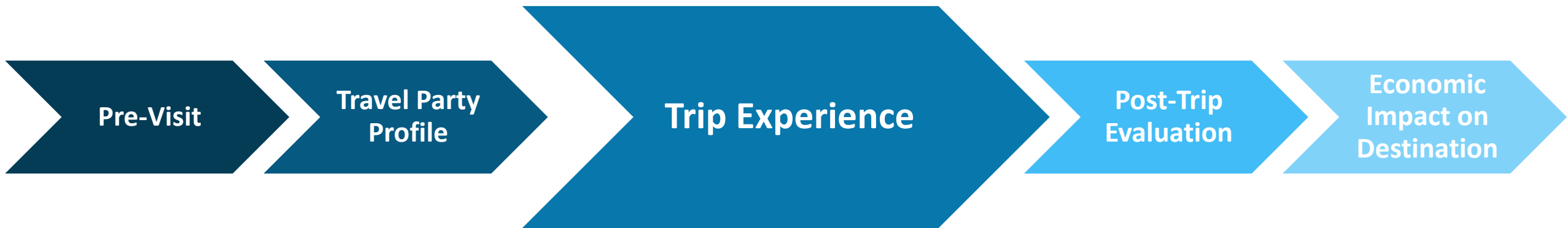
Summer visitors had a median household income of **\$177,300**.



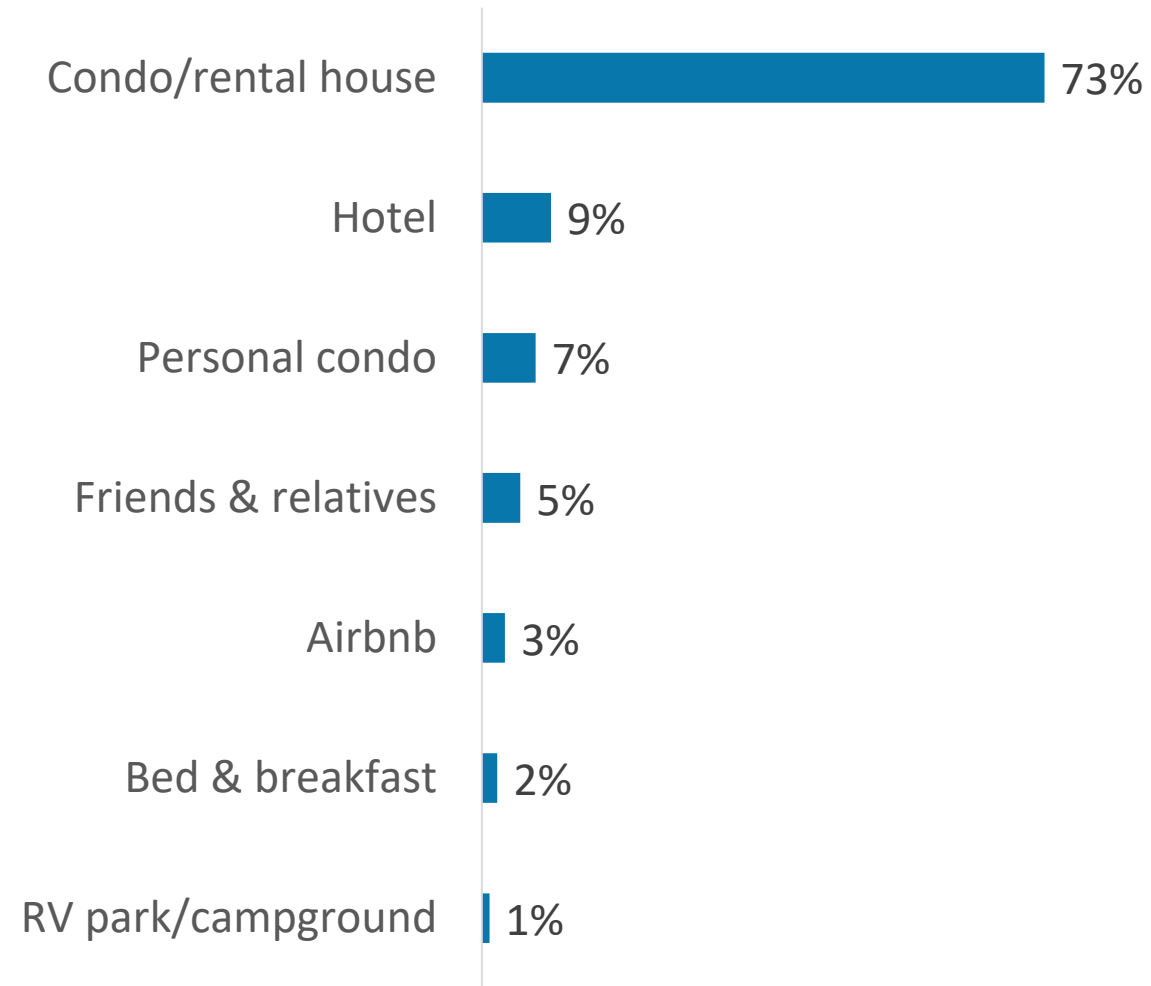
GENDER



VISITOR JOURNEY: TRIP EXPERIENCE



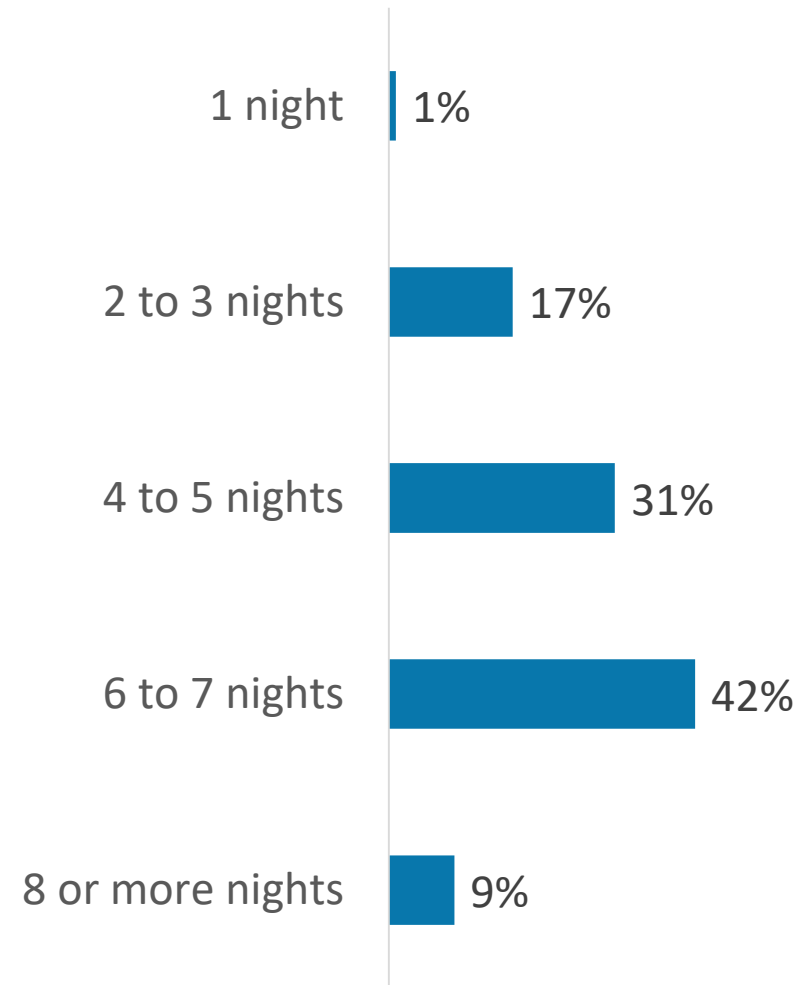
VISITORS' ACCOMMODATIONS



LENGTH OF STAY



Summer visitors spent an average of **6.1** nights in South Walton.

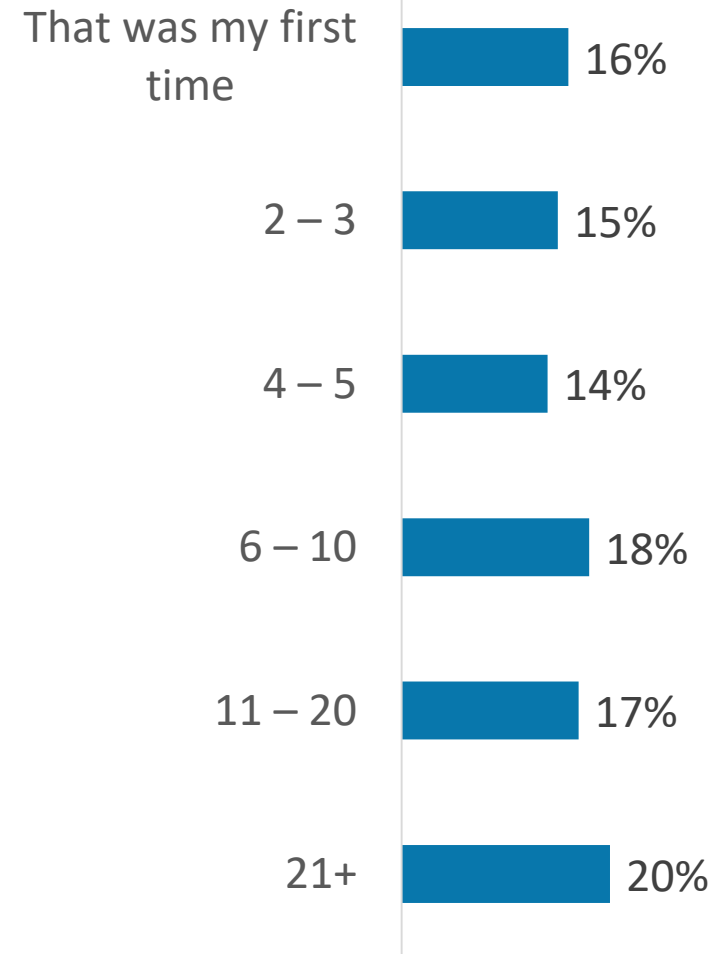


¹Visitors who stayed in paid accommodations up to 30 nights.

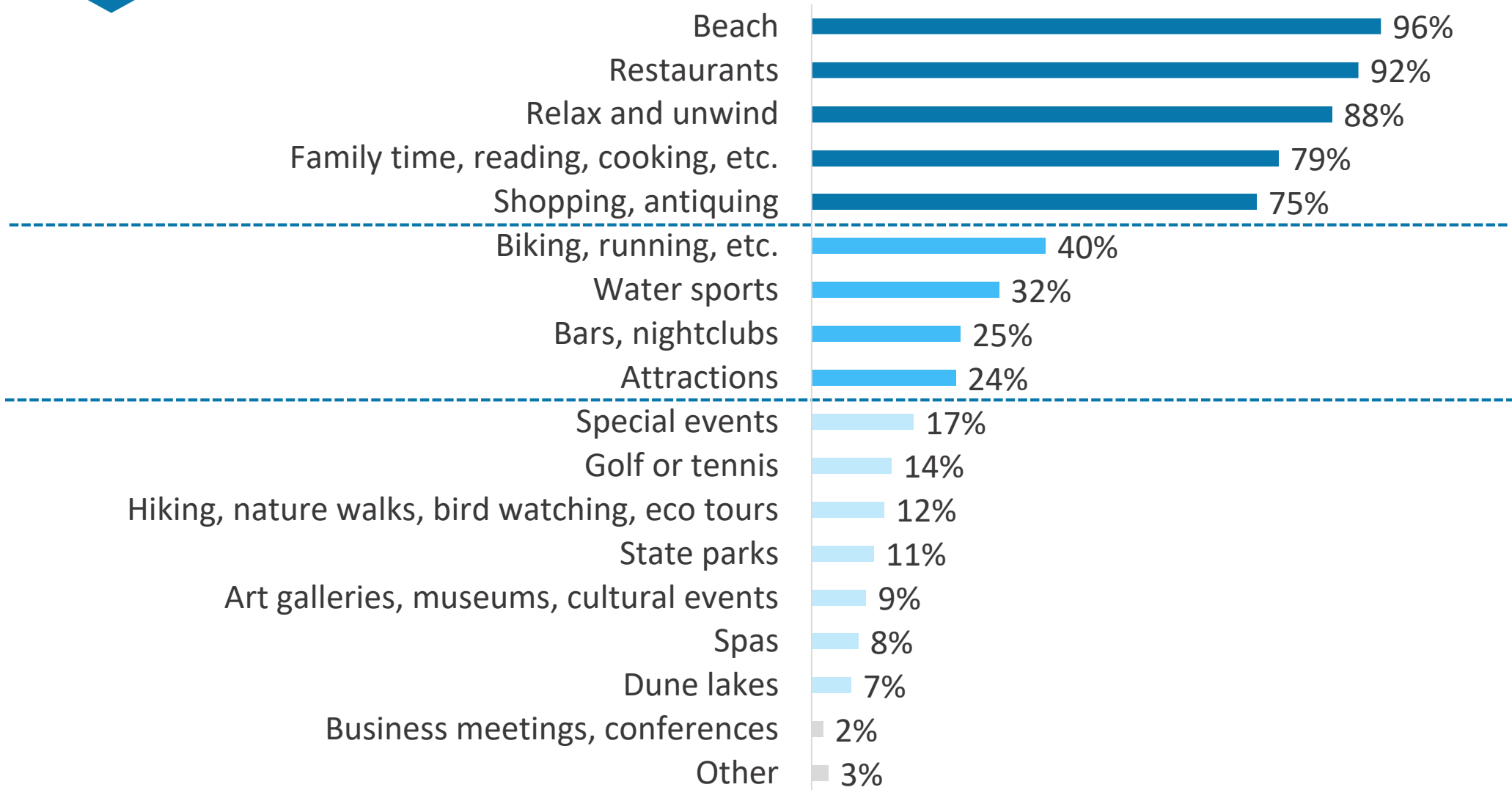
FIRST TIME AND EXPERIENCED VISITORS

16% of Summer visitors were visiting for the first time.

4 in 10 Summer visitors have visited South Walton 10 or more times.



VISITOR ACTIVITIES¹



¹Multiple responses permitted.

TYPICAL SOUTH WALTON TRAVEL PARTY EXPENSES¹

Visitor Metrics ¹	Average Daily Expenditure	Total Trip Expenditure
Accommodations	\$429	\$2,632
Restaurants	\$186	\$1,139
Groceries	\$68	\$417
Shopping	\$155	\$952
Entertainment	\$65	\$398
Transportation	\$67	\$406
Other	\$39	\$240
Total	\$1,009	\$6,184

¹For visitors staying 30 days or fewer

²This 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.

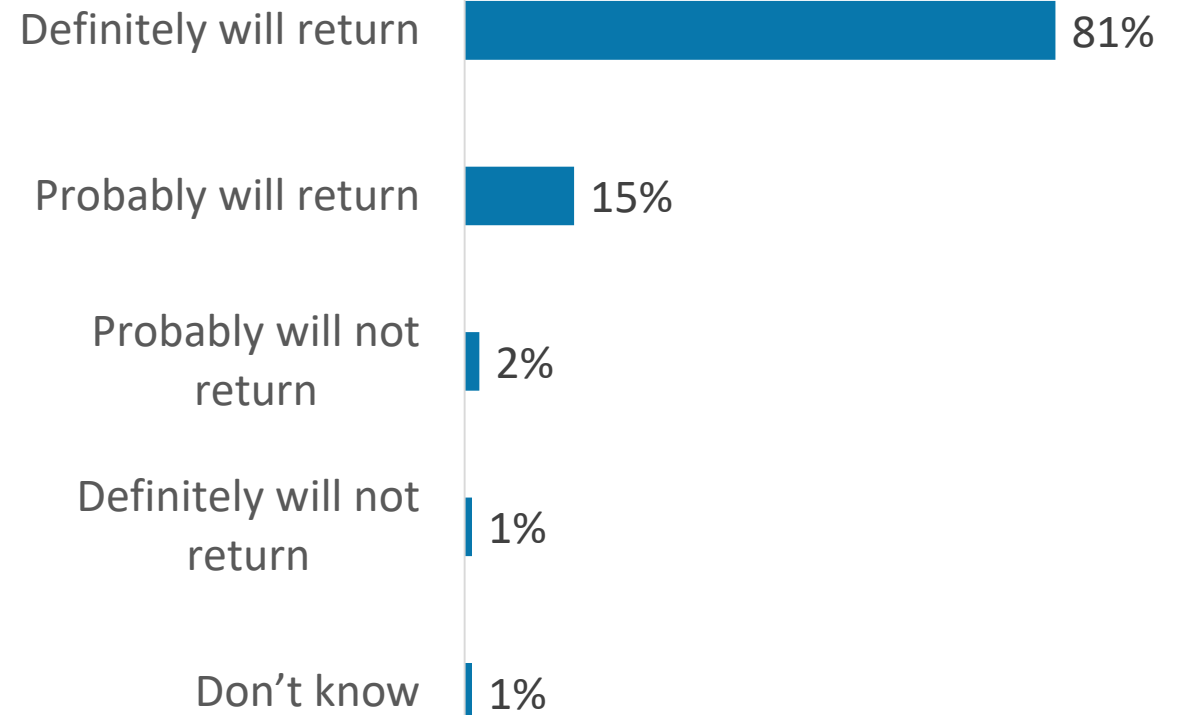
VISITOR JOURNEY: POST-TRIP EVALUATION



SATISFACTION WITH SOUTH WALTON

Spring visitors gave South Walton a rating of **9.2**¹ as a place to vacation.

96% will return to South Walton.²

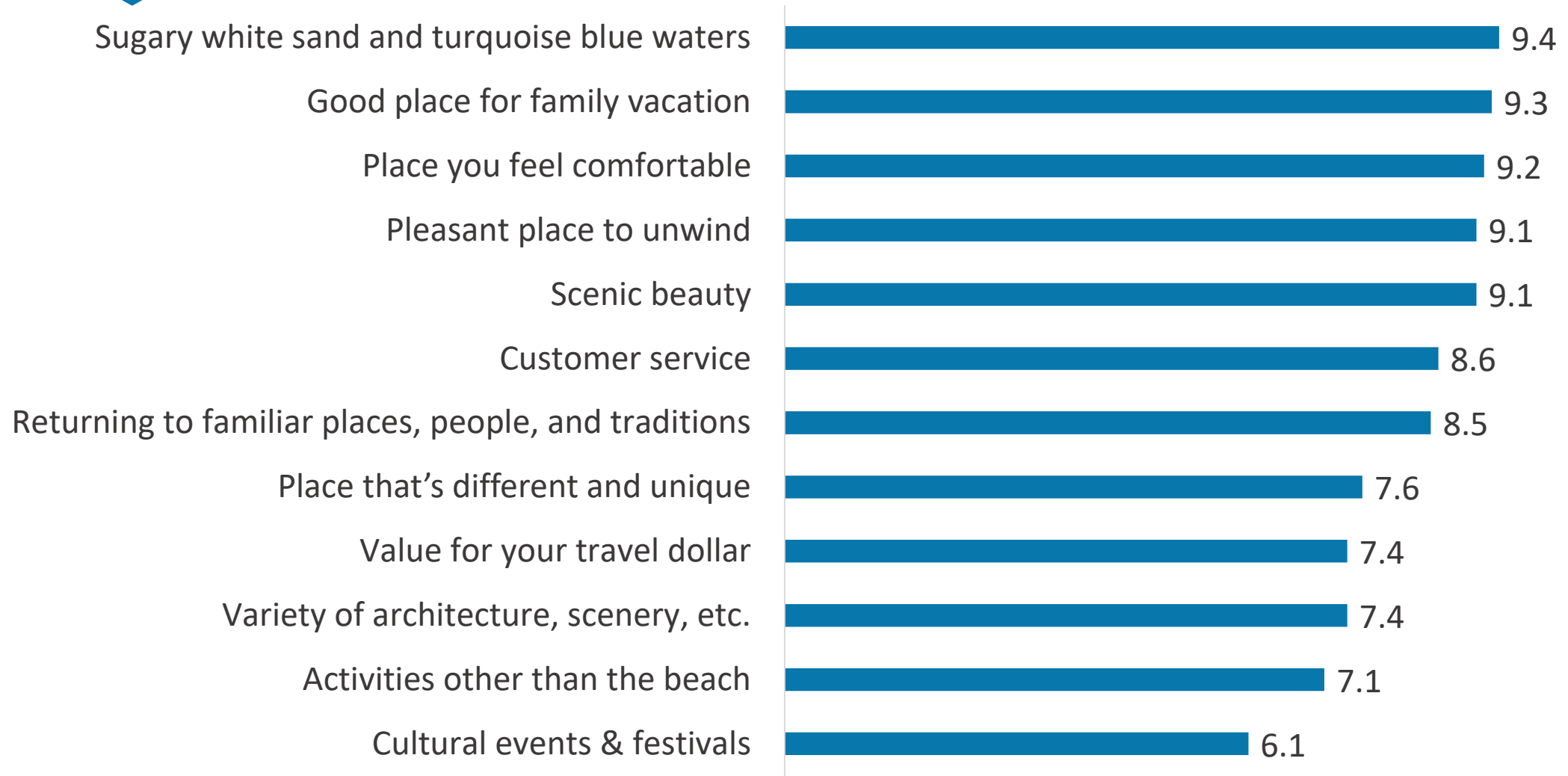


¹10 = Excellent; 1 = Poor

²2% of all visitors will not return to South Walton for the following reasons:

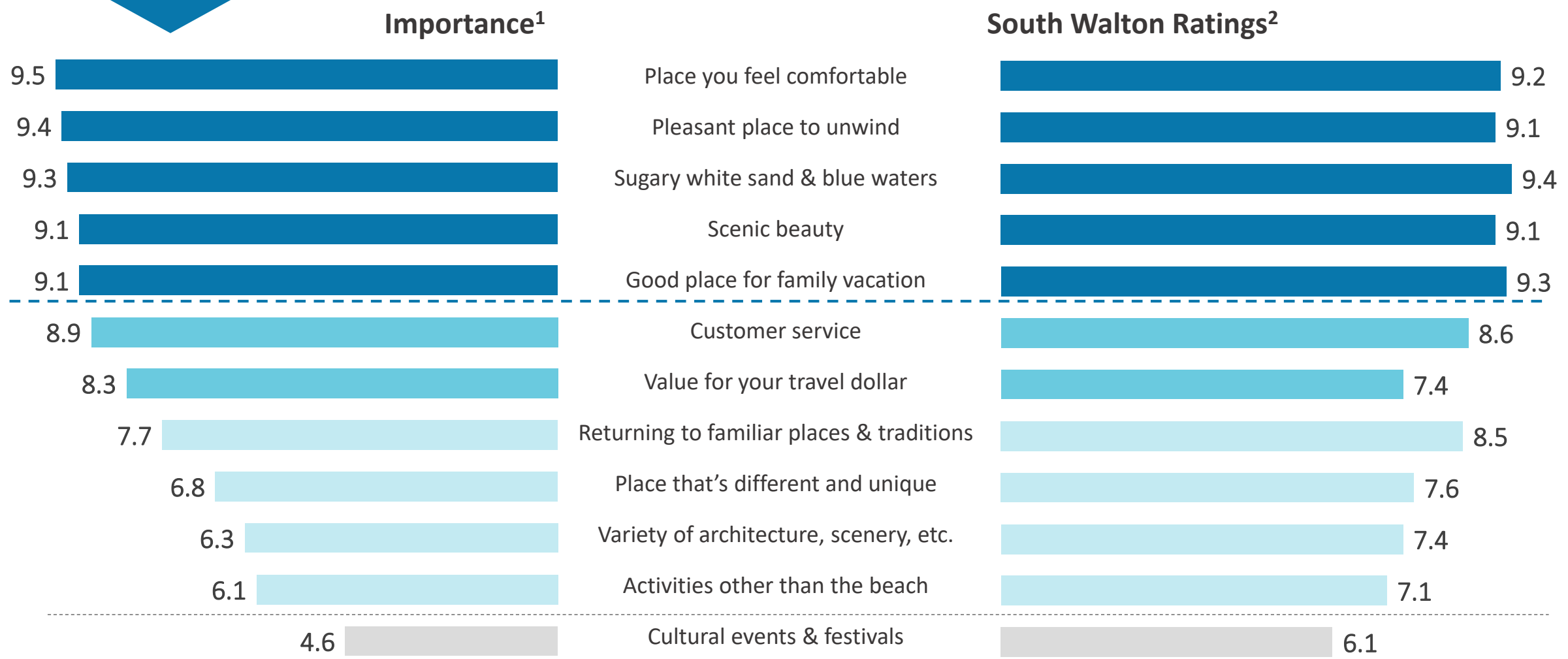
1. Too expensive
2. Parking was a problem
3. Traffic was a problem
4. Too crowded

RATING SOUTH WALTON¹



¹Rated on a scale from 1 to 10 where 1 is poor and 10 is excellent.

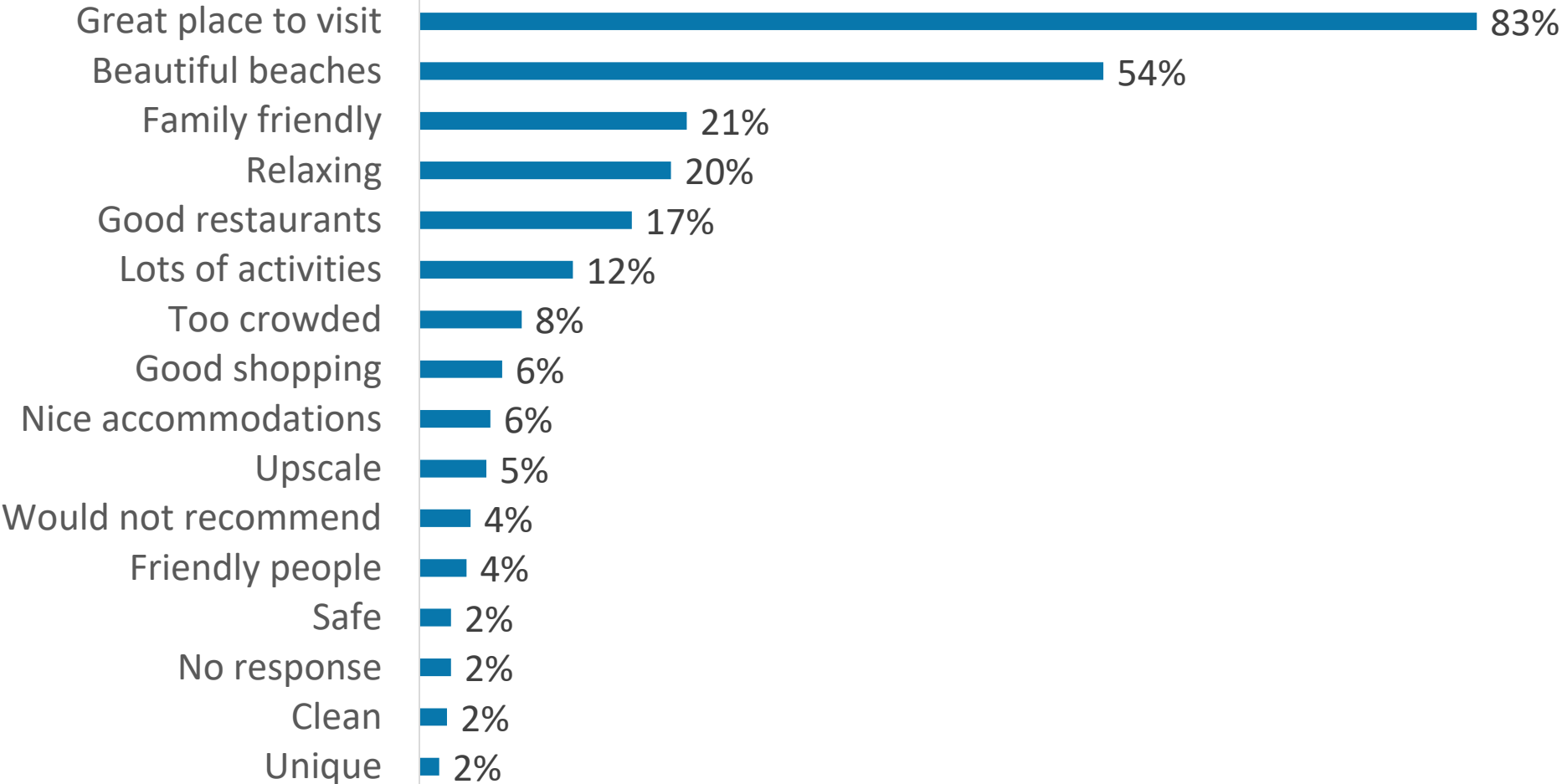
VACATION ATTRIBUTE IMPORTANCE VS. RATINGS



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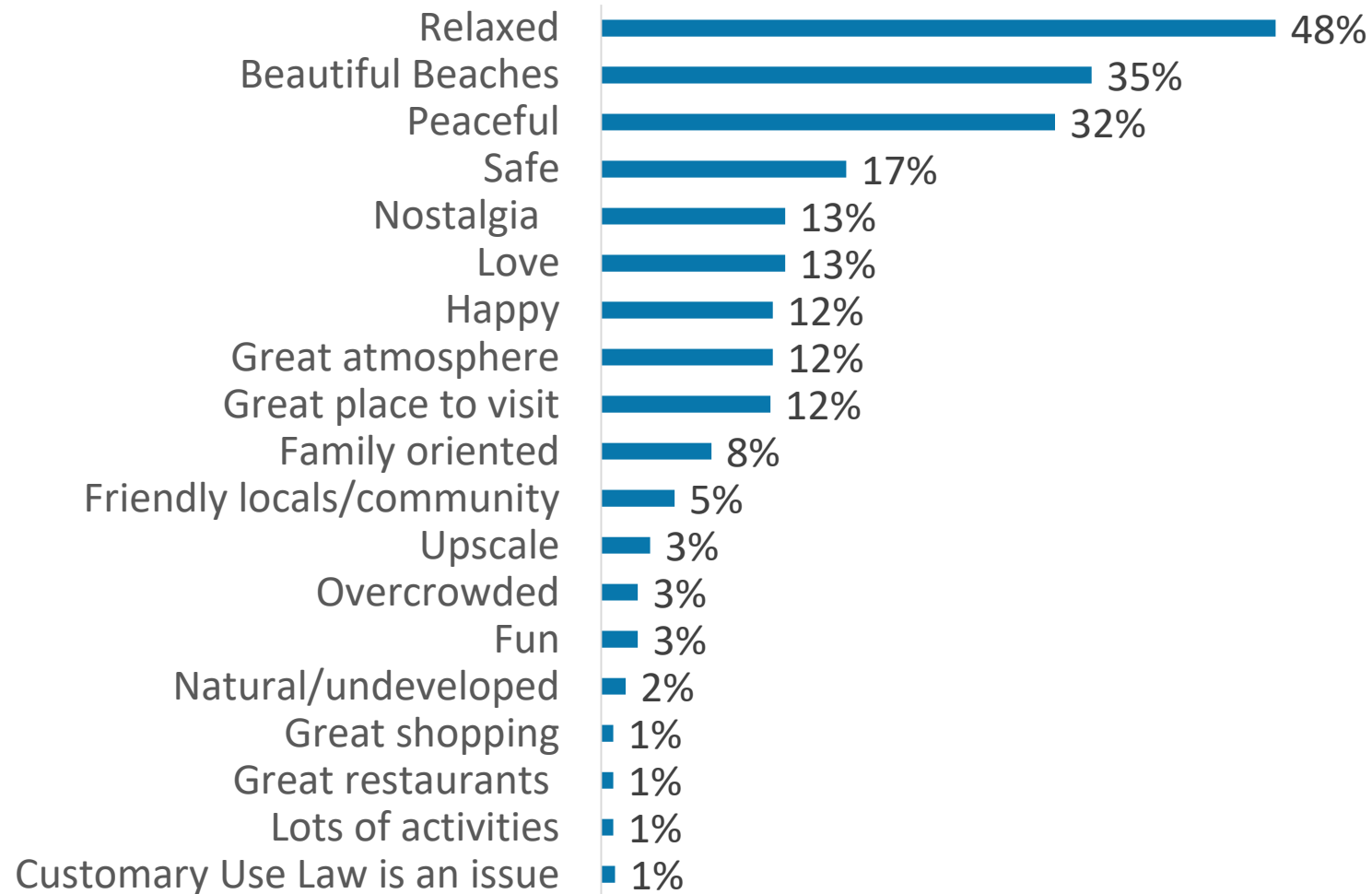
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VISITOR DESCRIPTIONS OF SOUTH WALTON¹



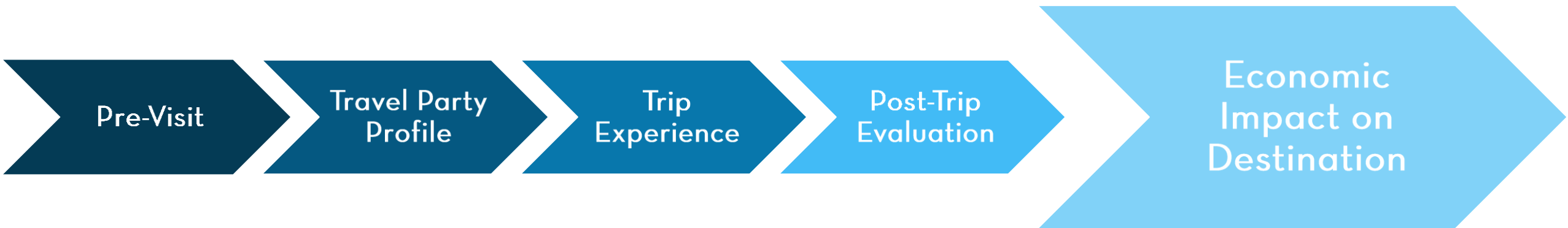
¹Coded verbatim response; multiple responses permitted.

EMOTIONS ASSOCIATED WITH SOUTH WALTON¹



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STUDY OBJECTIVES: ECONOMIC IMPACT



ECONOMIC IMPACT – SUMMER 2018 VS. 2019

An increase in active units from Summer 2018 to Summer 2019, coupled with increases in occupancy and ADR led to an increase in TDT of 4.1%.

Numbers of visitors were up 7.4%, which resulted in direct spending being up 13.8%.

With occupancy slightly up and ADR up modestly, RevPAR was up 4.3% despite the inventory increase.

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VISIT SOUTH WALTON

Visitor Tracking Study

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Joseph St. Germain, Ph.D
Phillip Downs, Ph.D.
Rachael Anglin
Isiah Lewis
Glencora Haskins
dsg-research.com
850.906.3111