

VISIT SOUTH WALTON

Spring 2021 Visitor Tracking Study
March 2021 – May 2021



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STUDY OBJECTIVES: MAP THE VISITOR JOURNEY



Visitor Tracking Study

This report is based on 500 internet and in-person surveys* with Spring visitors who traveled to South Walton between March 2021 and May 2021. Due to the abnormal nature of Spring 2020 as a result of COVID, comparisons are made to Spring 2019.

South Walton's visitor tracking and economic impact metrics were impacted by several factors in Spring 2021 including:

- Changes in visitor behavior
- Inventory increase

Visitor behavior

Fewer visitors stayed in their second home, with friends or relatives, or visited just for the day in Spring 2021
Visitors traveled in smaller parties and had a shorter length of stay

Inventory increase

Available units for visitors in Spring 2021 increased 2,610 units from 2019

*Interviews were with out-of-county guests who stayed at properties/vacation rentals at beach communities across South Walton, and at various locations along the beaches.

EXECUTIVE SUMMARY



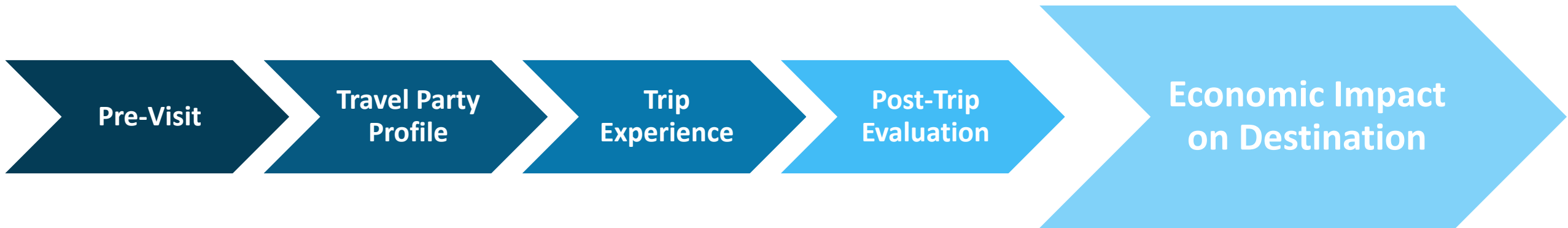
VISITOR JOURNEY: ECONOMIC IMPACT

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 – SPRING 2019 VS. 2020 VS. 2021

An increase of active units by 19.1% from 2019 and more visitors staying in paid accommodations contributed to a significant increase in room nights.

Compared to Spring 2019, ADR jumped 21.6% in Spring 2021. After adjusting 2019 TDT to 5% for an apples-to-apples comparison, TDT increased 78% in 2021 compared to 2019.

With over 1.3 million visitors this Spring, total economic impact was over \$1.7 billion.

Metrics	Spring 2019	Spring 2020	Spring 2021	% Δ '21/'19
Room nights	741,800	367,190	1,087,700	+46.6%
Total visitors	1,110,343	568,900	1,323,100	+19.2%
TDT collections	\$7,115,181 ¹	\$3,686,860	\$15,827,575 ¹	+78.0% ¹
Direct spending	\$900,109,600	\$451,151,400	\$1,163,700,100	+29.3%
Economic impact	\$1,332,162,190	\$667,704,100	\$1,722,276,100	+29.3%
Occupancy	61.1%	28.6%	72.6%	+18.9%
Room rates	\$304.42	\$297.11	\$370.05	+21.6%
RevPAR	\$186.00	\$84.97	\$268.79	+44.5%

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.

¹2019 tax rate is 4% compared to 5% in 2020 and 2021. 2021/2019 increase is calculated at 5%.

VISITOR JOURNEY: PRE-VISIT



PLANNING CYCLE

- » **59%** of visitors plan a Spring South Walton vacation at least 3 months in advance
- » **9%** of South Walton vacations are impulse decisions (plan a week or two in advance)
- » **11%** considered vacationing at a beach outside of South Walton - most of those beaches are in Florida



TOP TRIP PLANNING SOURCES*

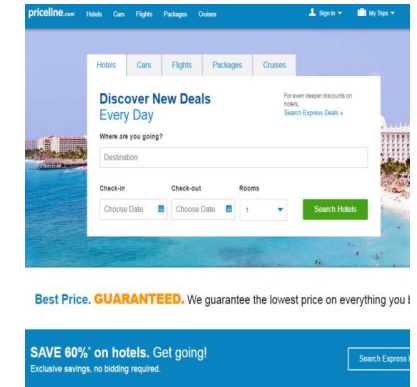


Friends, family **46%**

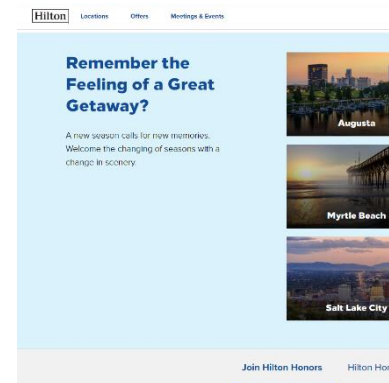
Search engines **36%**



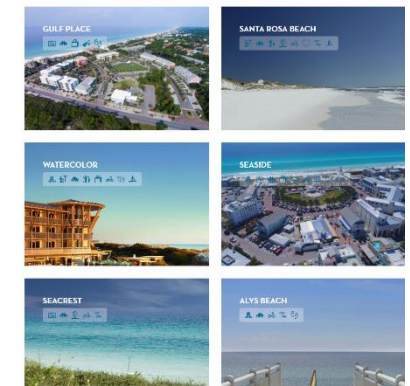
Online Travel Agency **27%**



Hotel Website **25%**



Website for 1 of the 16 beach neighborhoods **23%**



*Multiple responses permitted.

SOUTH WALTON VISITOR GUIDE

- » **25%** of visitors viewed (mostly online) the South Walton Visitors Guide before going to South Walton
- » Visitors Guide received a rating of **8.1 out of 10¹**



¹10 = Extremely useful; 1 = Not at all useful

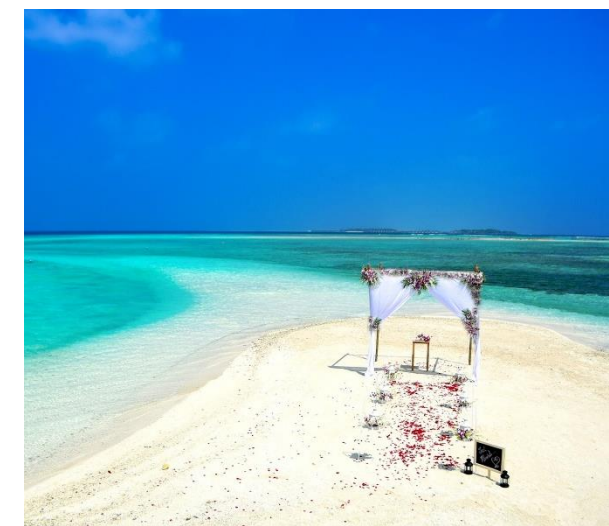
TOP REASONS FOR VISIT*

Relax and unwind **67%**

Family vacation **58%**

Annual routine **21%**

Special occasion **18%**



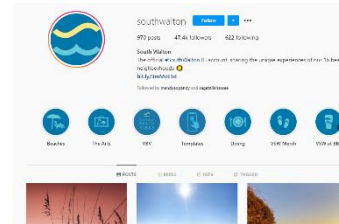
*Multiple responses permitted

TOP SOUTH WALTON PROMOTIONS

- » **36%** of visitors have recently noticed promotions about South Walton
- » This information influenced **10%** of visitors to visit South Walton

Top Sources of Promotions

South Walton Social Media



Online article



Other social media accounts



Magazine article



TOP BOOKING SOURCES

Hotel/condo
54%

**Residence
Inn[®]
Marriott[®]**



hotel • dining • spa

Vacation Rental Company
20%

NEWMAN-DAILEY
RESORT PROPERTIES, INC.[®]


Southern
RENTALS & REAL ESTATE


DUNE ALLEN REALTY
Vacation Rentals

VRBO, Homeaway
14%

 **HomeAway[®]**

 **VRBO[®]**
from HomeAway[®]

VacationRentals.com[™]
Part of the HomeAway Family

VISITOR TRANSPORTATION

- » **83%** of visitors drove to South Walton
- » **17%** who flew used the following airports:

58%

Northwest Florida Beaches
International Airport



28%

Destin-Ft. Walton Beach
Airport



9%

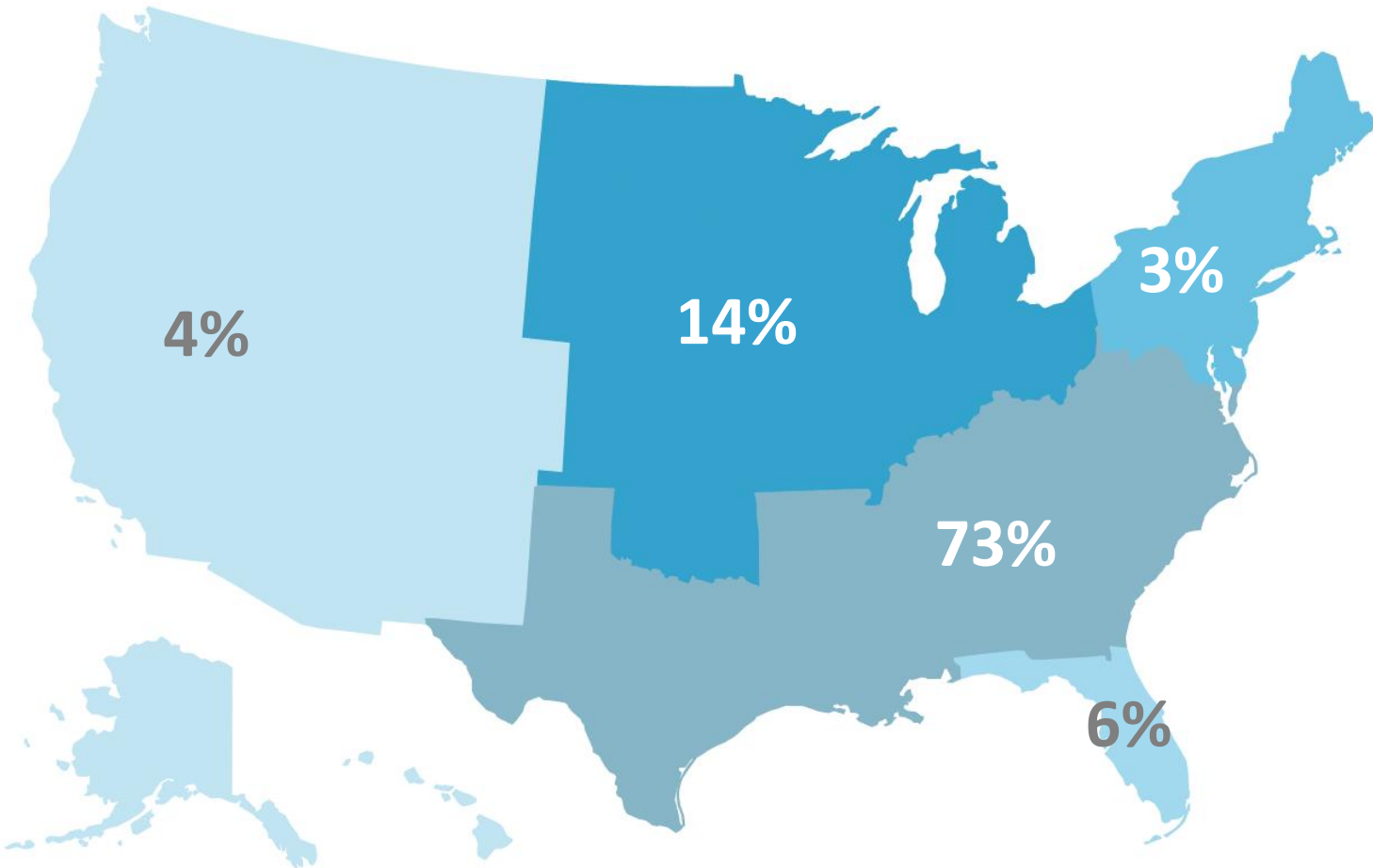
Pensacola International
Airport



VISITOR JOURNEY: TRAVEL PARTY PROFILE

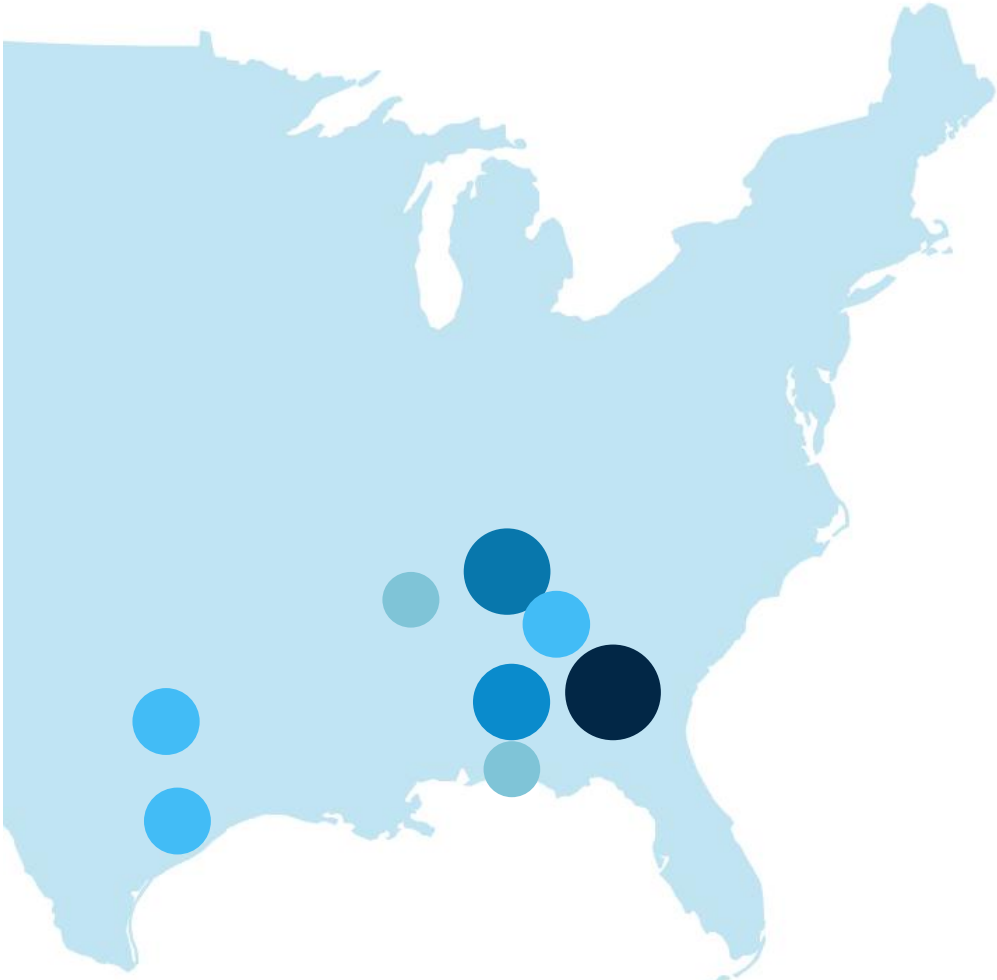


ORIGIN OF SPRING VISITORS



ORIGIN OF SPRING VISITORS

54% of visitors are from 8 markets.



- 19% ● Atlanta
- 9% ● Nashville
- 8% ● Birmingham
- 4% ● Chattanooga
- 4% ● Dallas – Ft. Worth
- 4% ● Houston
- 3% ● Memphis
- 3% ● Pensacola – Mobile

TRAVEL PARTY SIZE AND COMPOSITION

The typical visitor traveled in a party composed of **5.0** people



44% traveled with at least one person under the age of 20 in their travel party



SPRING VISITOR PROFILE



- » The typical South Walton Spring visitor:
 - » **56** years old
 - » Female (**72%¹**)
 - » Median household income of **\$167,400**
 - » From the Southeast (**79%**)

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

VISITOR PROFILE: TYPICAL VACATIONER¹



» The typical Vacationer visitor:

- » **55** years old
- » Female (**72%**²)
- » Median household income of **\$167,400**
- » From the Southeast (**81%**)
- » **44%** travel with children
- » **83%** 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:
 - » **66** years old
 - » Female (**67%**²)
 - » Median household income of **\$236,400**
 - » From the Southeast (**47%**) and Midwest (**33%**)
 - » **32%** travel with children
 - » **84%** drive to the area

¹Travel parties who stayed more than 10 nights.

²Responses impacted by person more willing to be interviewed and who booked the trip.

VISITOR PROFILE: TYPICAL DAY TRIPPER

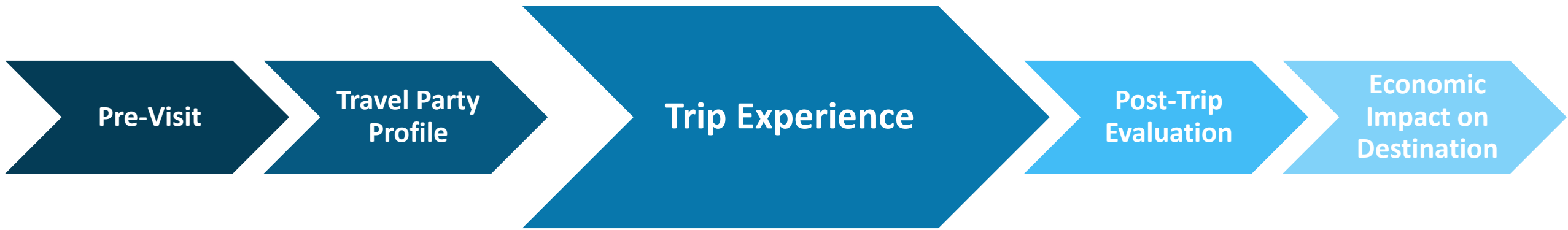


» The typical Day Trip visitor:

- » **61** years old
- » Female (**78%²**)
- » Median household income of **\$137,500**
- » From the Southeast (**74%**)
- » **50%** travel with children
- » **86%** 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

65% Condos, rental houses, etc.



11% Personal home/condo



9% Hotels



TOP VISITOR ACTIVITIES*

Beach **91%**



Restaurants **87%**



Relax and unwind **79%**



Shopping, antiques **54%**



Family time, reading, cooking **54%**



*Multiple responses permitted.

LENGTH OF STAY

- » Visitors spent **6.0*** nights in South Walton



*Visitors who stayed 30 or fewer nights.

FIRST-TIME AND EXPERIENCED VISITORS

- » **17%** were first-time visitors
- » **2 in 5** had visited more than 10 times



TRAVEL PARTY EXPENDITURES

- » Travel parties spent **\$719** a day
- » Travel parties spent **\$4,314** on their trip



VISITOR JOURNEY: POST TRIP EVALUATION



VISITOR SATISFACTION

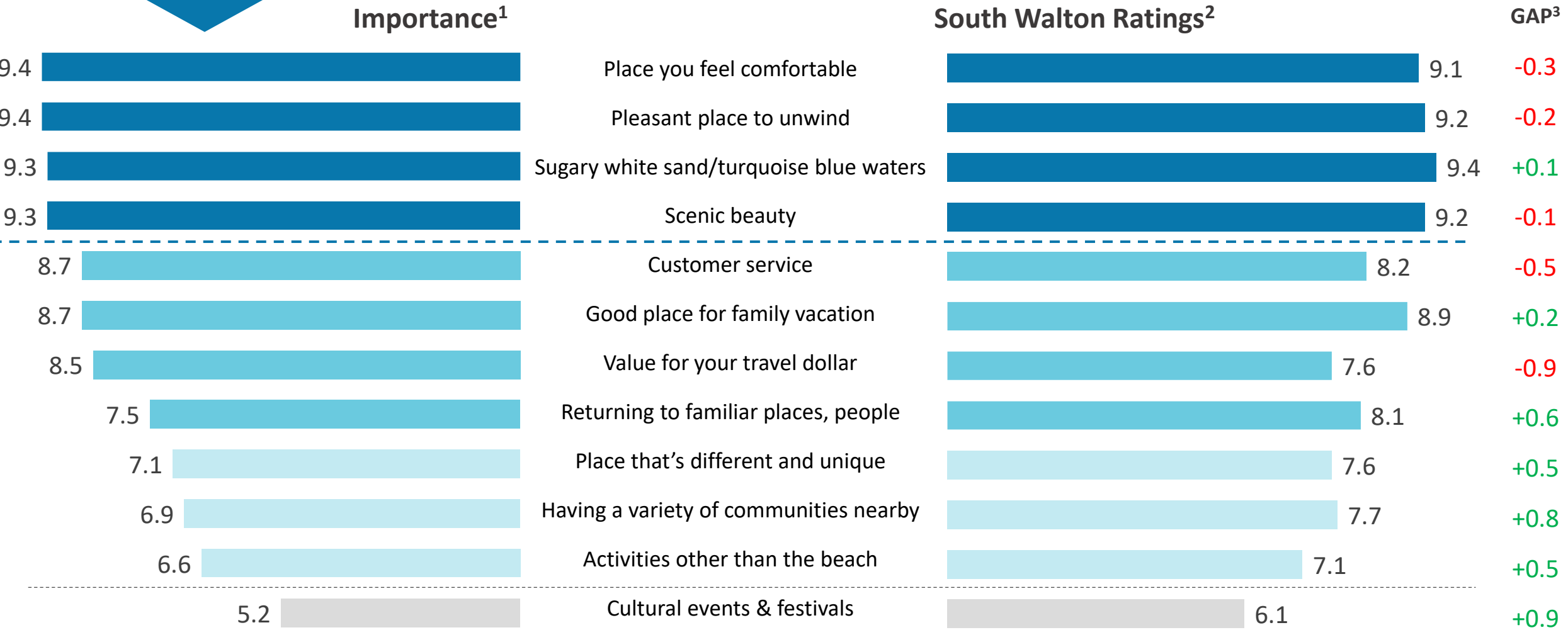
- » Visitors gave South Walton a rating of **8.9¹** as a place to vacation
- » **93%** will return to South Walton²



¹ 10 = Excellent; 1= Poor

² 4% 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 your feel comfortable" is extremely important to visitors with a score of 9.4. Visitors rated SW as 9.1 on its ability to make them feel comfortable. Hence, the GAP is -0.3.

VISITOR DESCRIPTIONS OF SOUTH WALTON



Beautiful White Sand & Clear Water (70%)

“Beautiful white sandy beaches with crystal clear blue water. Friendly people. Peaceful. Lovely views. Wonderful recreation for our family and safe.”

Relaxing & Stress Free (27%)

“South Walton is a very relaxing place and while on the beach. Even with a group of people, it is very tranquil. Great shops and good music at most of the local places.”



Family Friendly (24%)

“A family friendly place with amazing beaches and attractions for the whole family. You will never be bored!”

YEARLY COMPARISONS

VISITOR PROFILE – SPRING 2019 VS. 2020 VS. 2021

Visitor Metrics	Spring 2019	Spring 2020	Spring 2021
Travel party	5.4	5.0	5.0
Kids <20	49%	57%	44%
Median age	53	48	56
Estimated median household income	\$167,500	\$165,600	\$167,400
Stayed in condo/rental house	74%	62%	65%
Drove	83%	90%	83%
Nights spent	6.0	6.1	6.0
Direct expenditures (travel party for entire trip)	\$5,796	\$5,894	\$4,314
1 st time visitor	15%	14%	17%
10+ visits to South Walton	42%	38%	43%

VISITOR PROFILE – SPRING 2019 VS. 2020 VS. 2021

Top Origin States	Spring 2019	Spring 2020	Spring 2021
Georgia	14%	16%	22%
Tennessee	10%	12%	16%
Alabama	12%	12%	14%
Texas	9%	11%	10%
Florida	9%	14%	6%
Origins - Regions	Spring 2020	Spring 2020	Spring 2021
Southeast	71%	77%	79%
Midwest	21%	16%	14%
Northeast	3%	3%	3%
West	3%	3%	4%
International	2%	1%	0%

VISITOR PROFILE – SPRING 2019 VS. 2020 VS. 2021

Top Visitor Activities	Spring 2019	Spring 2020	Spring 2021
Beach	95%	92%	91%
Restaurants	95%	87%	87%
Relax and unwind	88%	82%	79%
Family time, reading, cooking	78%	69%	54%
Shopping, antiquing	72%	60%	54%
Biking, running	45%	46%	35%
Bars, nightclubs	25%	24%	25%
State parks	17%	18%	22%
Hiking, nature walks, eco tours	19%	21%	18%
Golf or tennis	15%	15%	16%
Dune lakes	10%	13%	15%
Water sports	23%	23%	14%
Attractions	19%	16%	13%
Special events	16%	14%	9%
Art galleries, museums, cultural events	10%	8%	6%
Spas	6%	7%	5%
Business meetings, conferences	2%	4%	3%
Other	3%	3%	2%

VISITOR PROFILE – SPRING 2019 VS. 2020 VS. 2021

Visitor Metrics	Spring 2019	Spring 2020	Spring 2021
Will return to South Walton	96%	97%	93%
Rating for overall experience ¹	9.2	9.0	8.9
Viewed Visitors Guide ²	18%	21%	25%
Planned trip 6+ months out	26%	21%	24%
Used VisitSouthWalton.com	18%	23%	17%
Used 1 of 16 beaches' websites	32%	27%	23%
Use the term "South Walton"	18%	21%	26%

¹ 10-point scale with 10=Excellent & 1=Poor.
² 19% used the online version & 6% used the print version.

DETAILED FINDINGS



VISITOR JOURNEY: PRE-VISIT



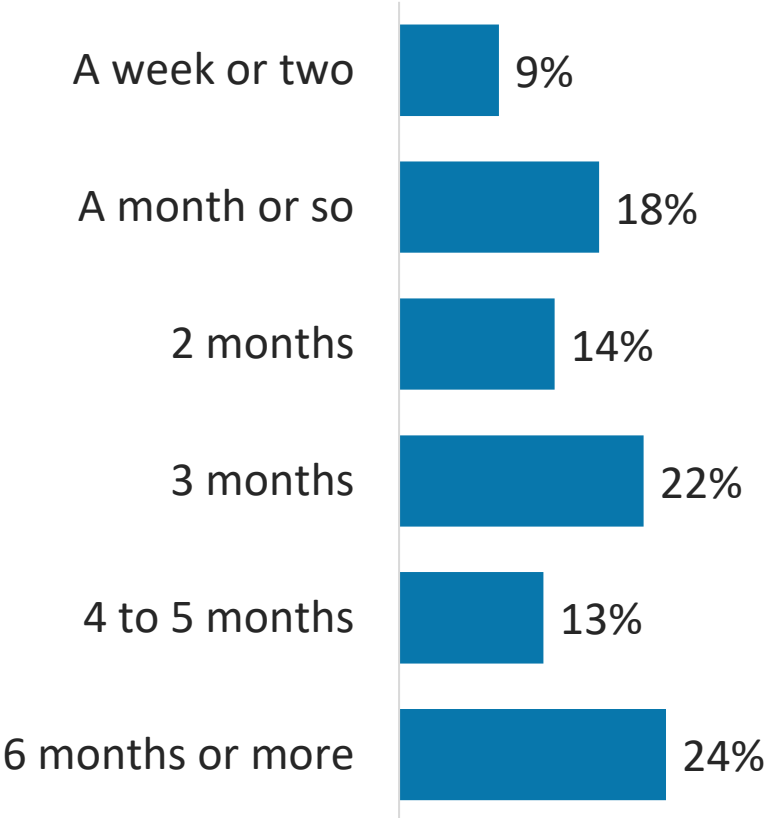
PLANNING CYCLE



About 3 in 5 visitors plan a Spring South Walton vacation at least **3 months out**.



Over 1 in 4 visitors to South Walton have a **short (a month or less) planning cycle**.



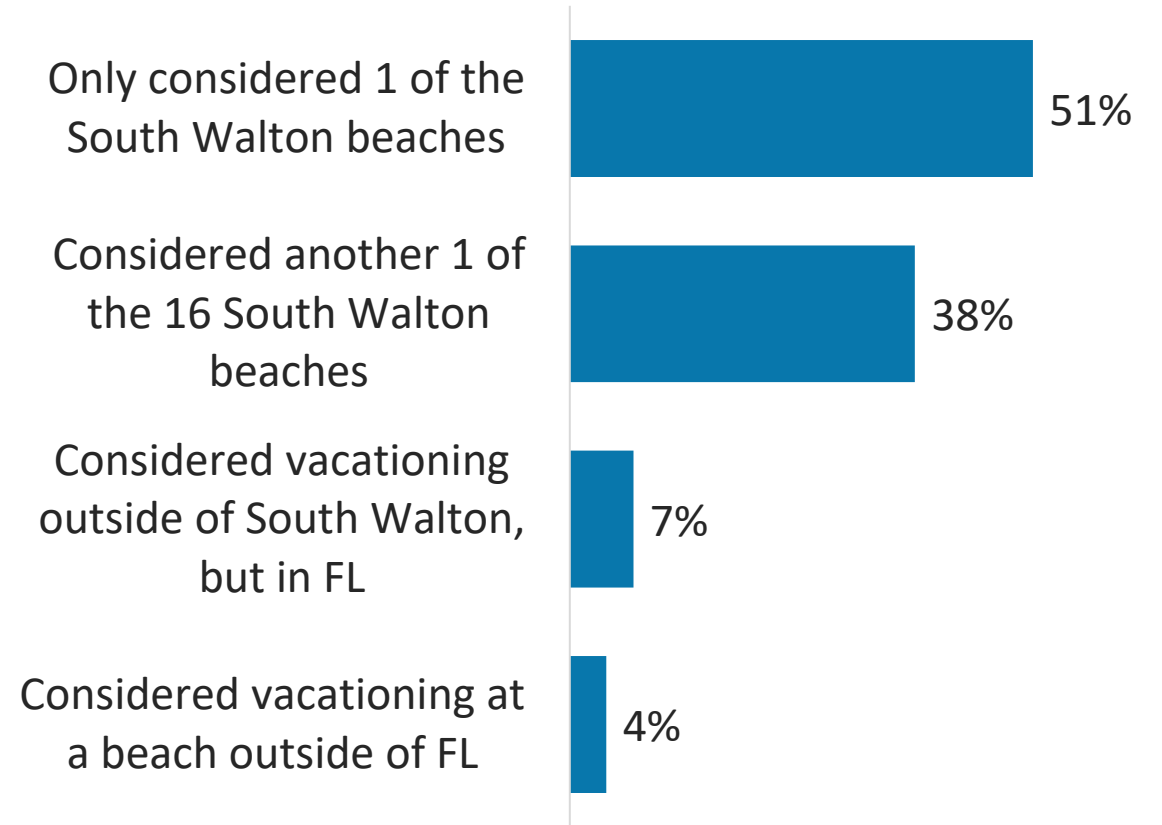
OTHER DESTINATIONS CONSIDERED



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

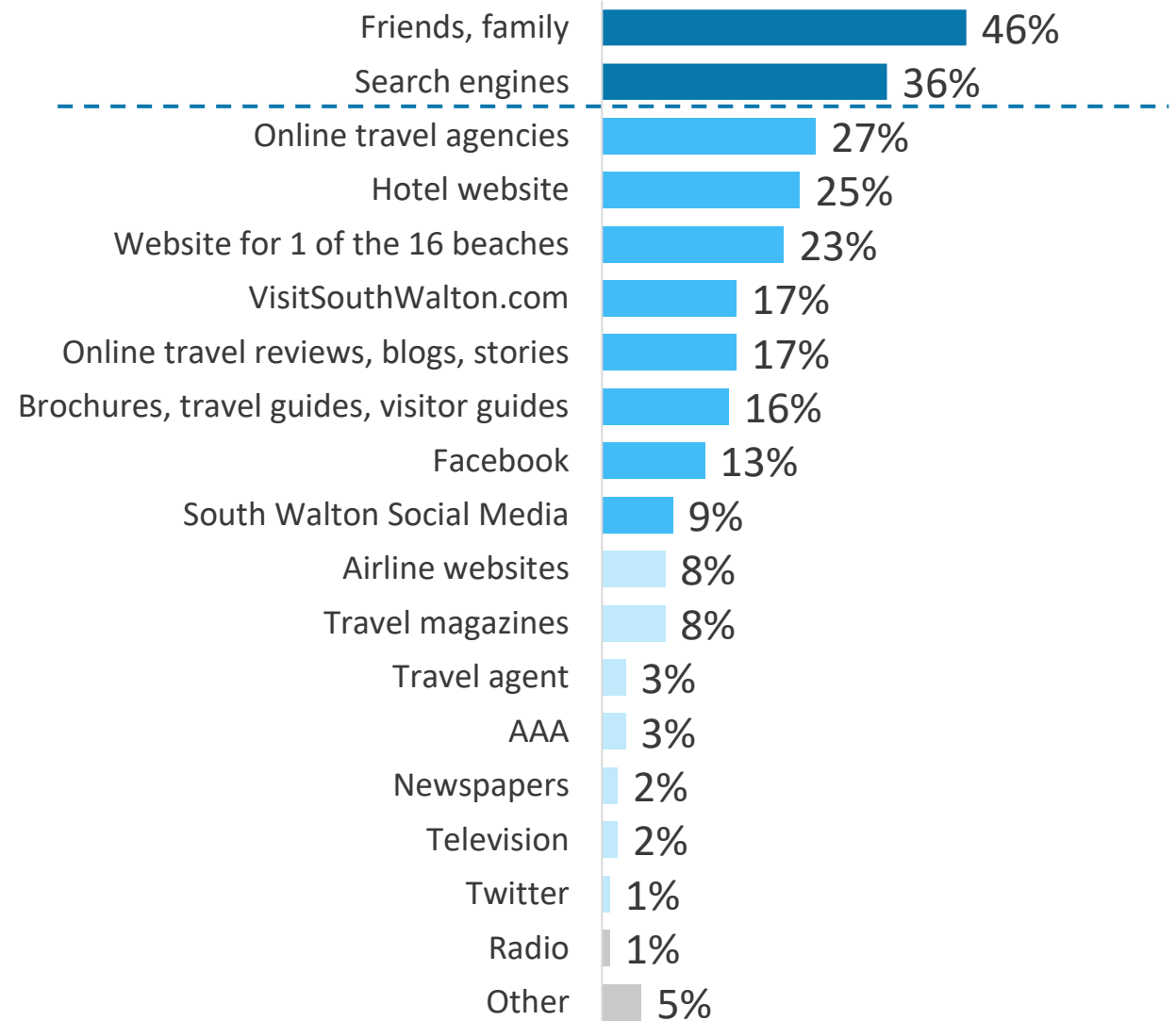


26% use the term “South Walton” when referring to the area.



TRIP PLANNING SOURCES¹

46% of visitors used friends and family to help plan their trip to South Walton.



¹Multiple responses permitted.

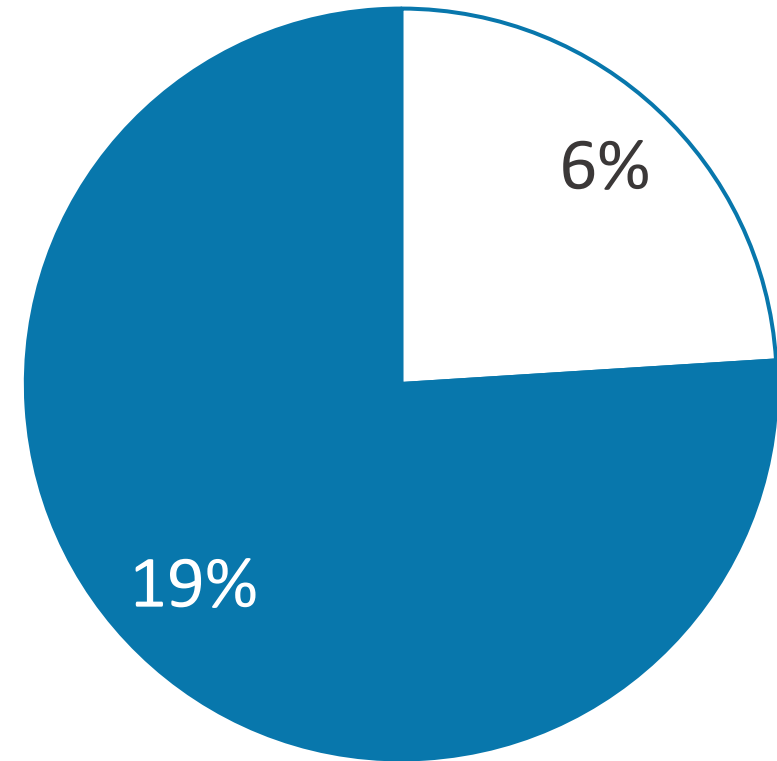
SOUTH WALTON VISITOR GUIDE



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



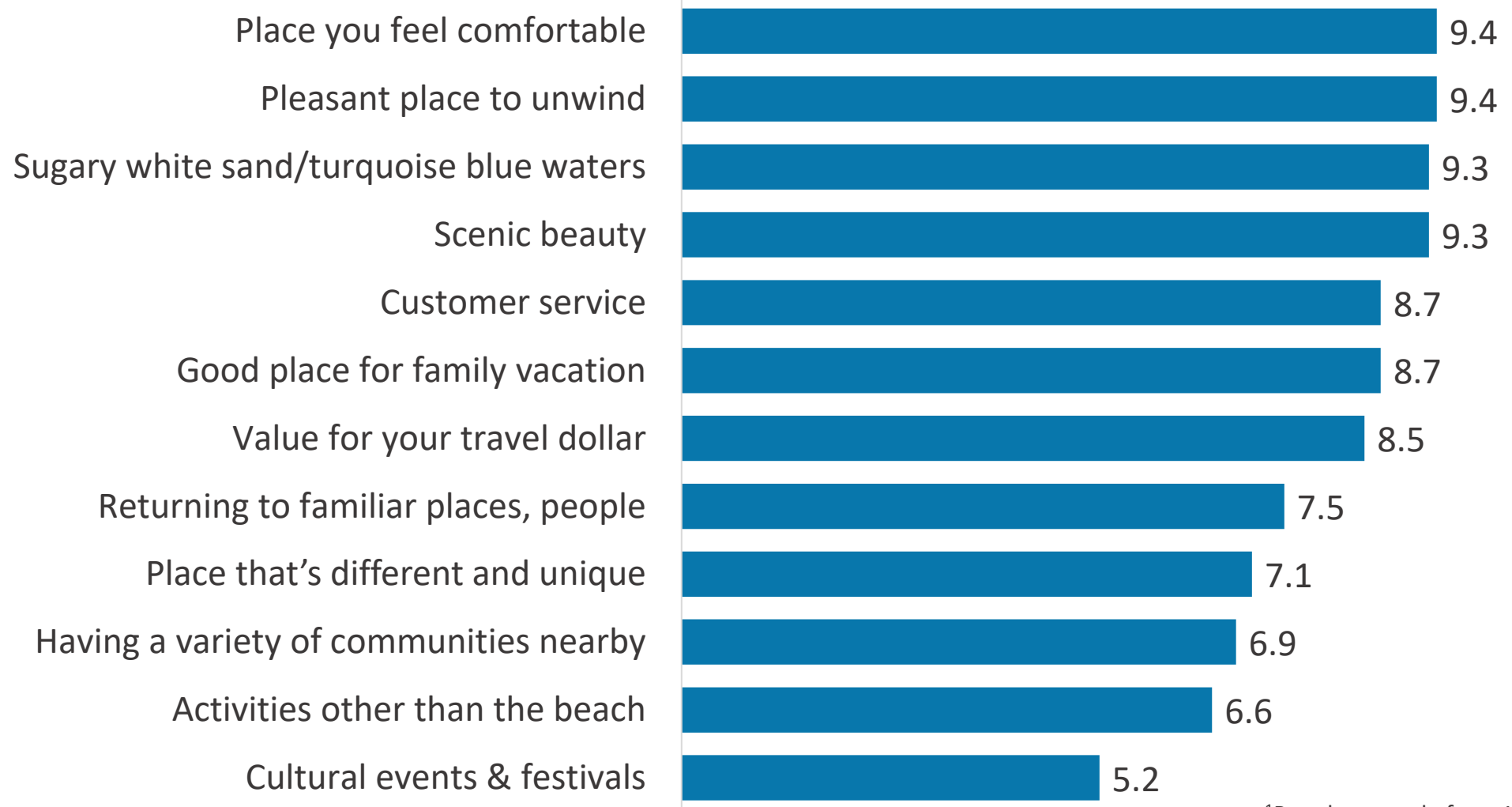
Visitors Guide received a rating of **8.1 out of 10¹**.



□ Print version ■ Online version

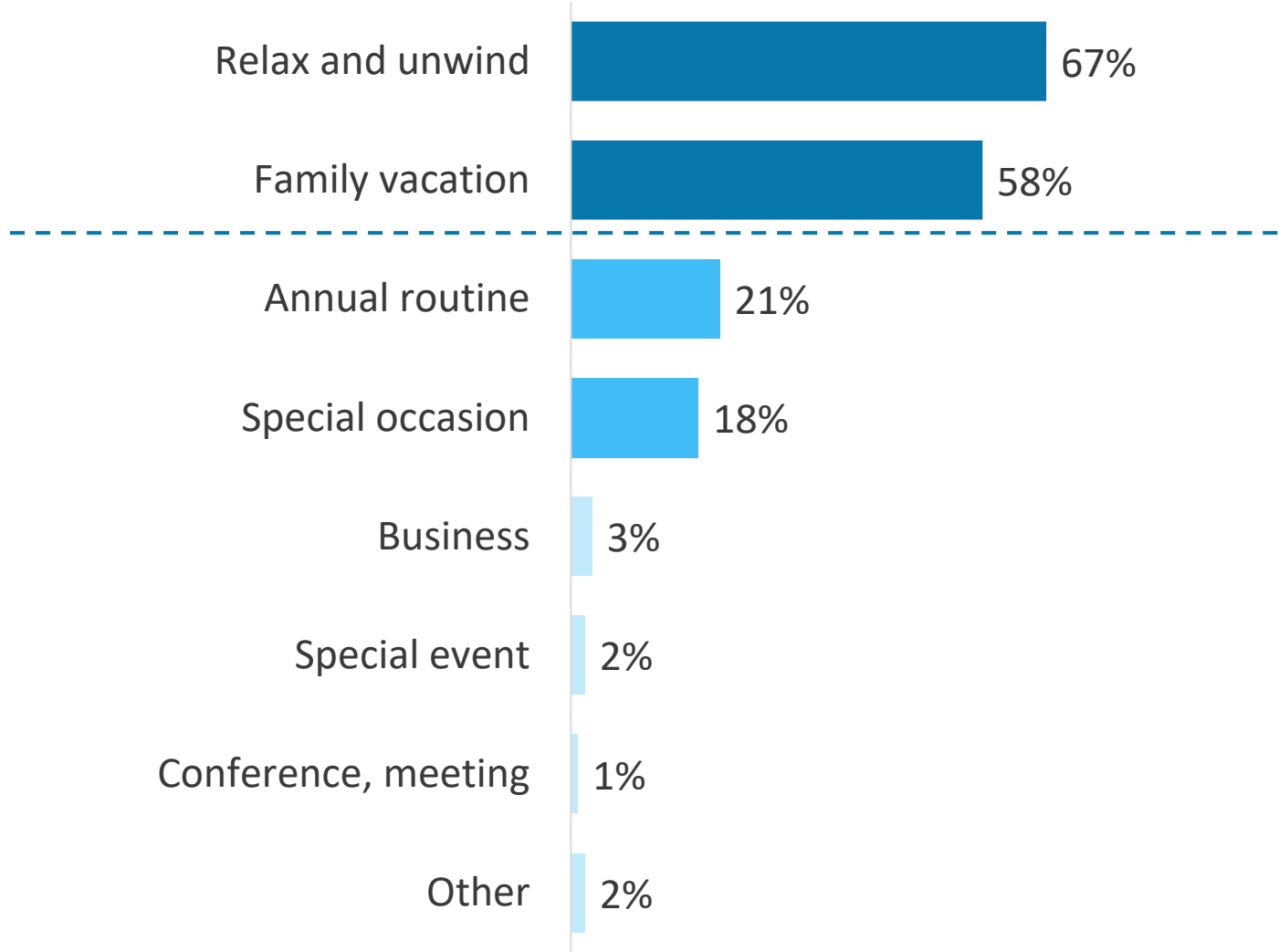
¹Rated on a 10-point scale where 10 is extremely useful and 1 is not at all useful.

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



¹Multiple responses permitted.

SOUTH WALTON PROMOTIONS¹

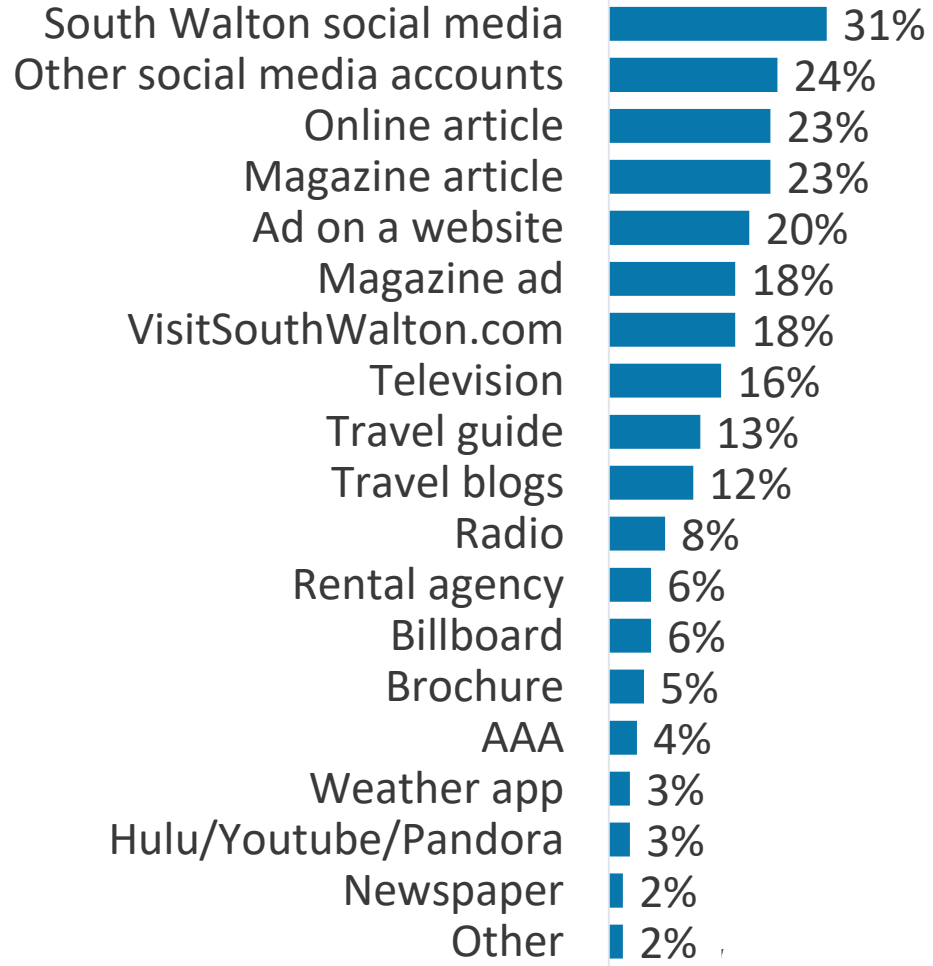


36% of Spring visitors have recently seen, read or heard advertising, promotions or travel stories about South Walton.



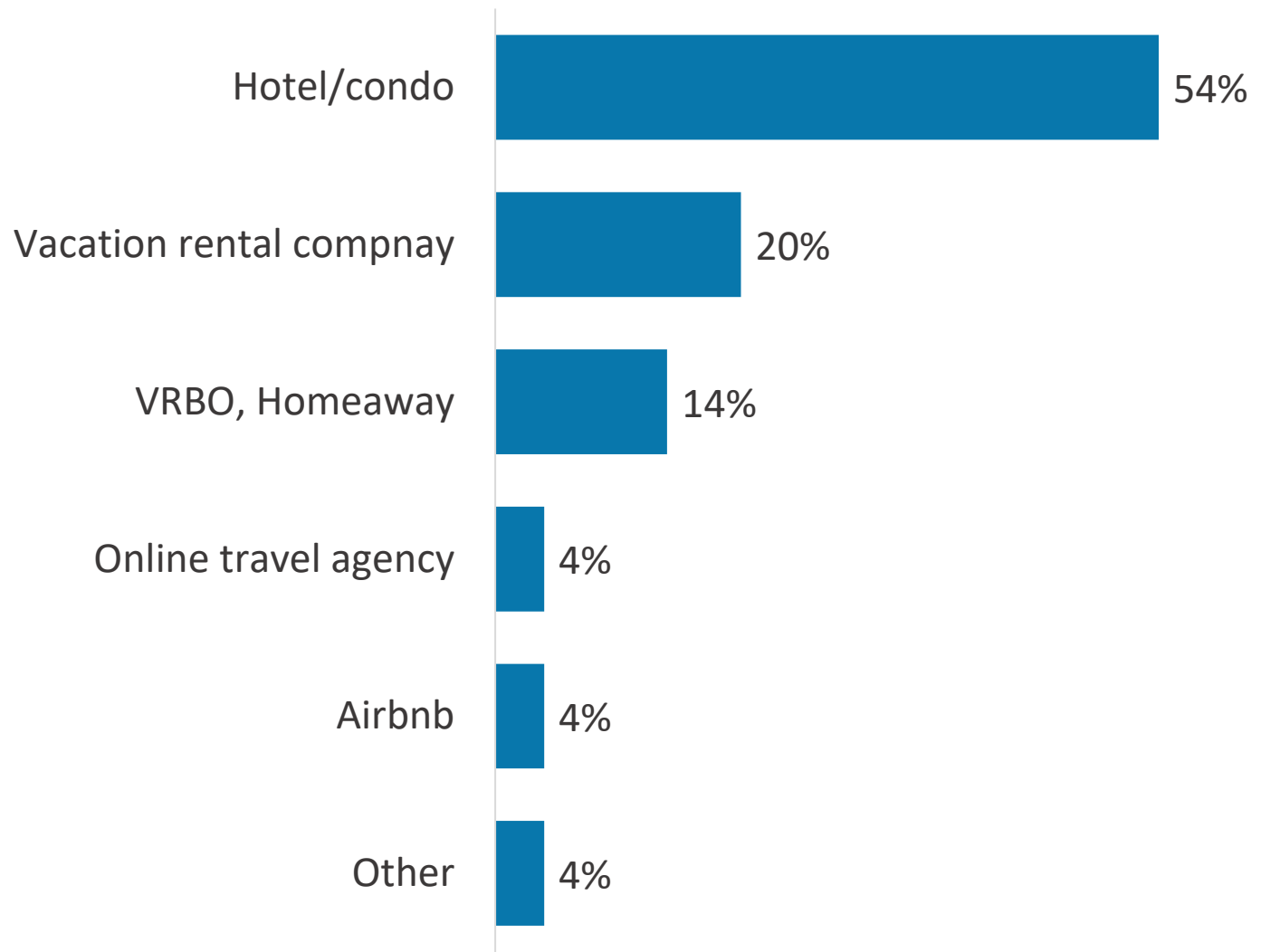
This information influenced **10%** of all visitors to visit South Walton.

Base: 36% of visitors who noticed advertising




¹Multiple responses permitted.


BOOKING ACCOMMODATIONS



VISITOR TRANSPORTATION

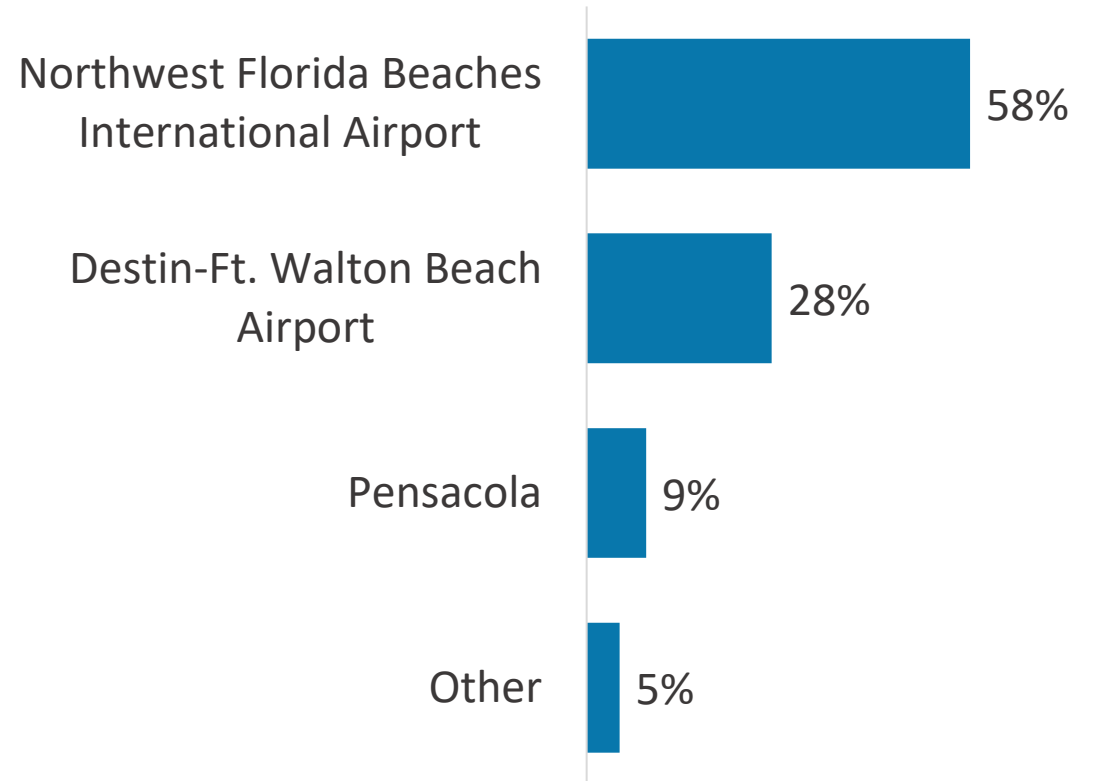


83% of Spring visitors drove to South Walton.



3 in 5 of those who drove were aware that there were direct flights from their city to the South Walton area.

17% who **flew** used the following airports:

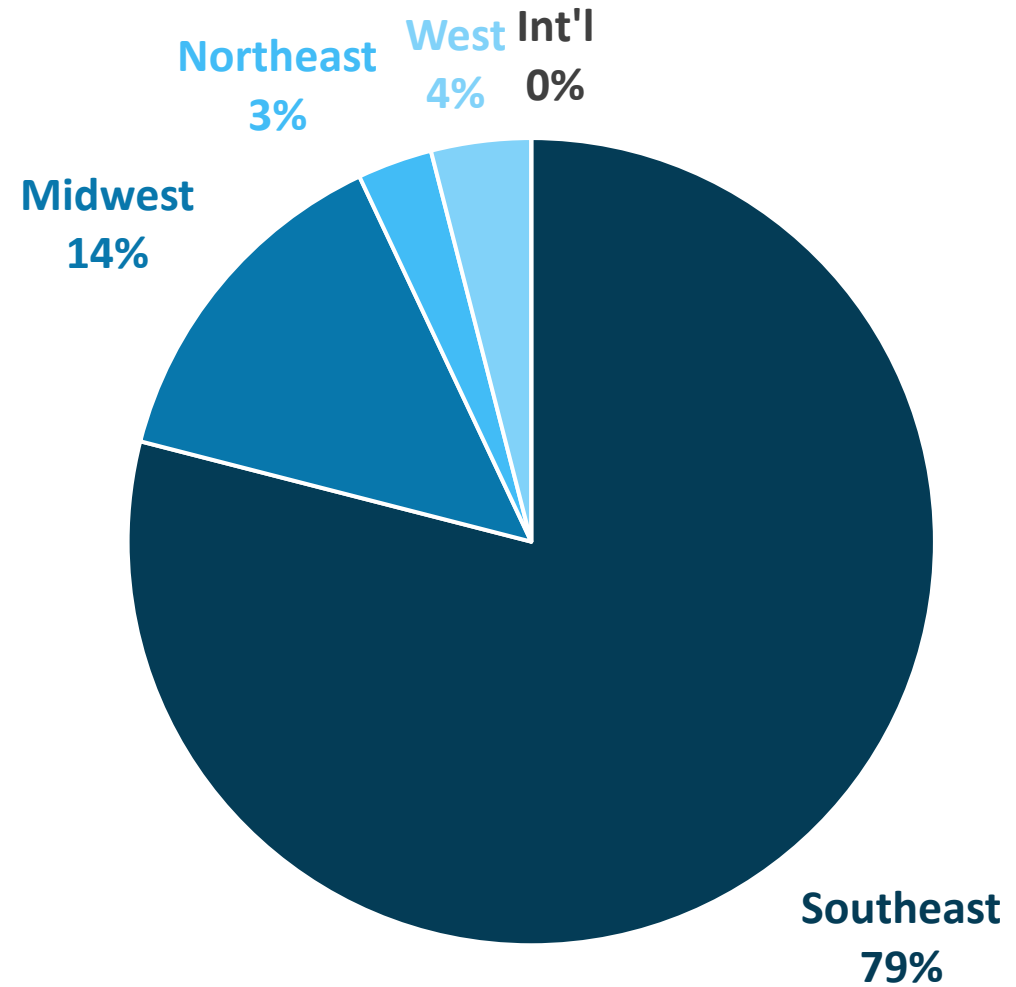


VISITOR JOURNEY: TRAVEL PARTY PROFILE



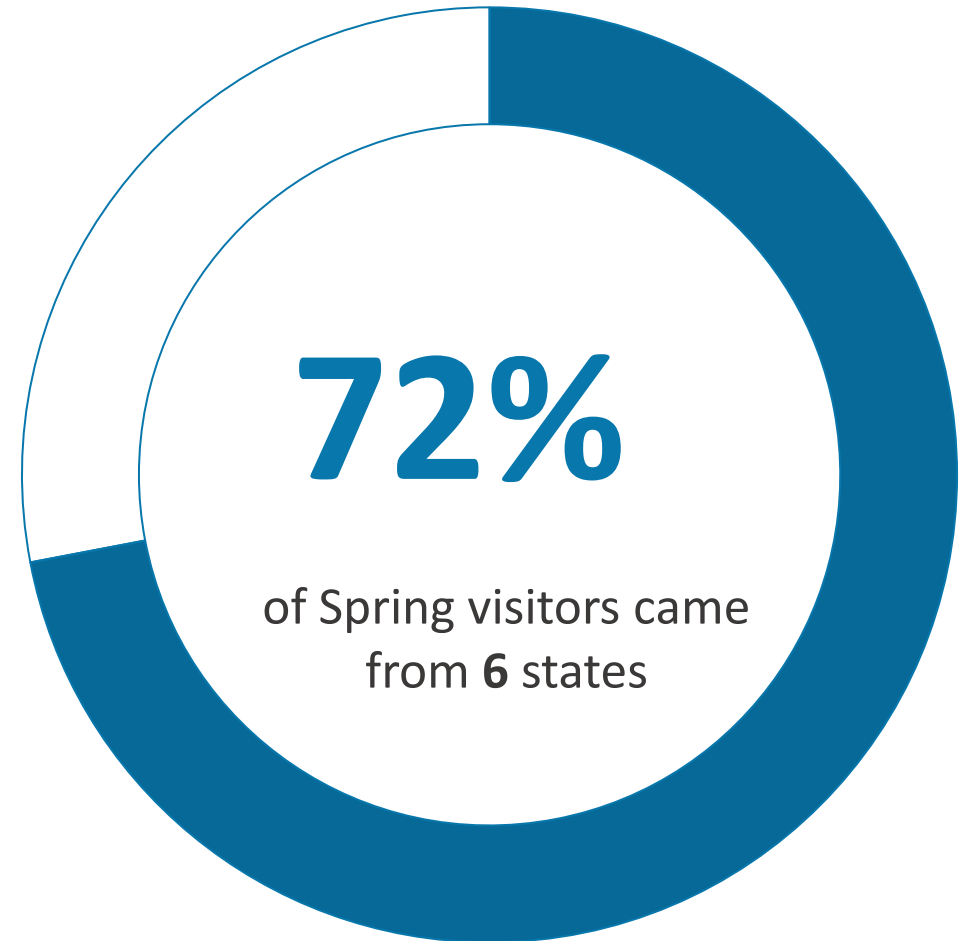
ORIGIN OF SPRING VISITORS

Top Origin Markets	% of Visitors
Atlanta	19%
Nashville	9%
Birmingham	8%
Chattanooga	4%
Dallas – Ft. Worth	4%
Houston	4%
Memphis	3%
Pensacola – Mobile	3%
Baton Rouge	2%
Chicago	2%
Cincinnati	2%
Little Rock	2%



ORIGIN OF SPRING VISITORS

State	% of Visitors
Georgia	22%
Tennessee	16%
Alabama	14%
Texas	10%
Florida	6%
Louisiana	4%



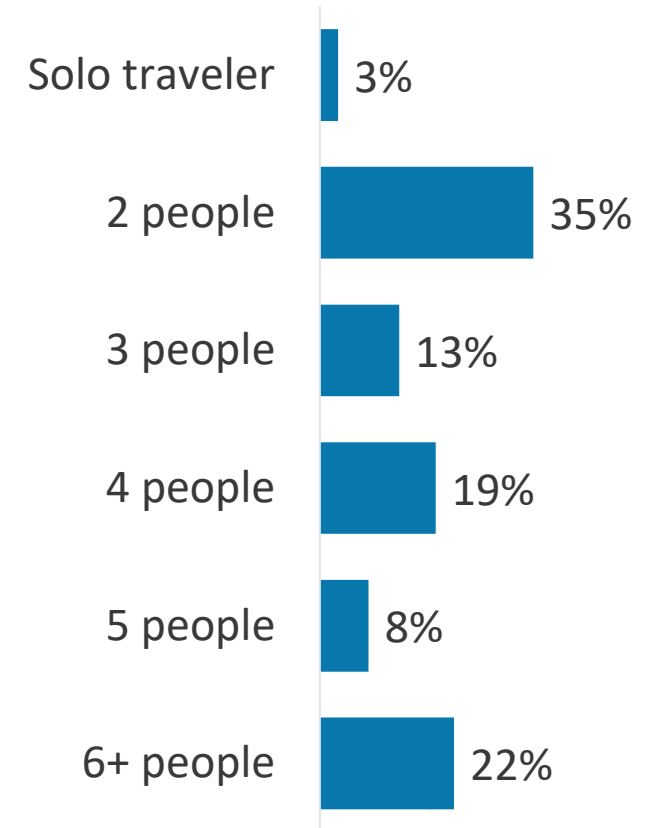
TRAVEL PARTY SIZE AND COMPOSITION



Visitors traveled in a party composed of **5.0** people.



Over 2 in 5 visitors traveled with children under the age of 20.

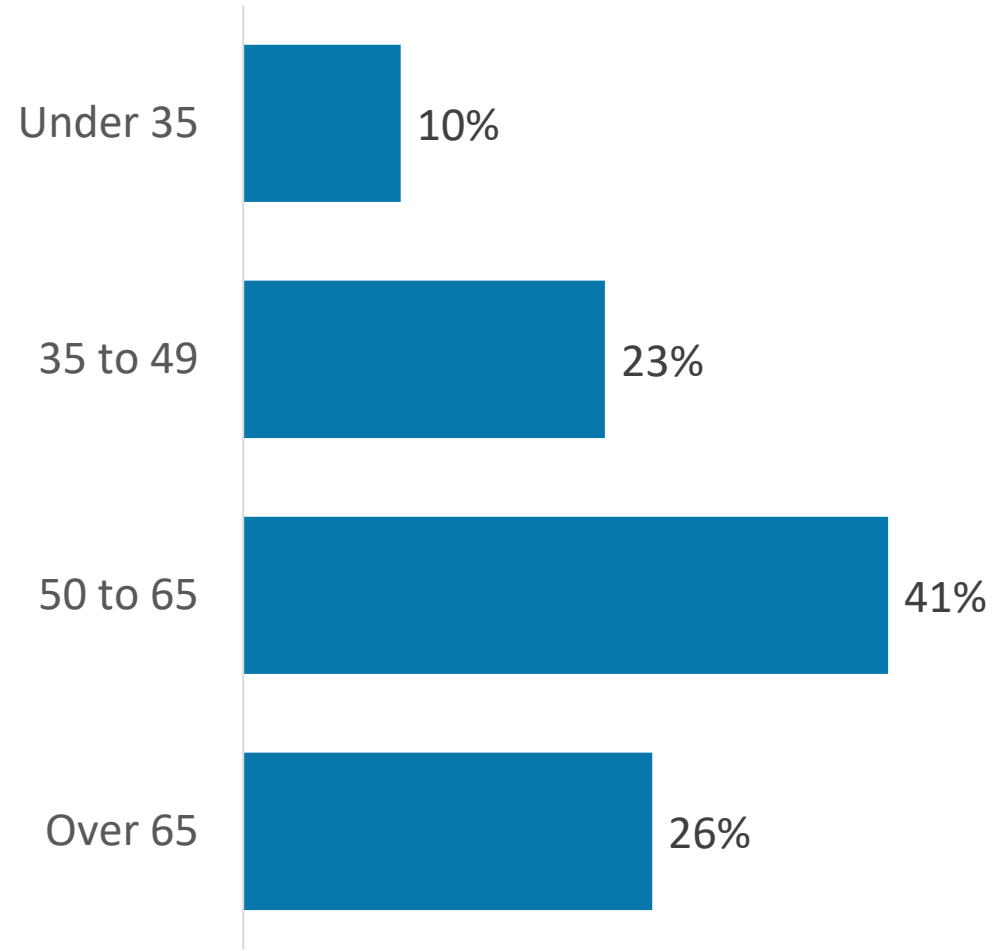


¹Multiple responses permitted.

AGE OF SPRING VISITORS

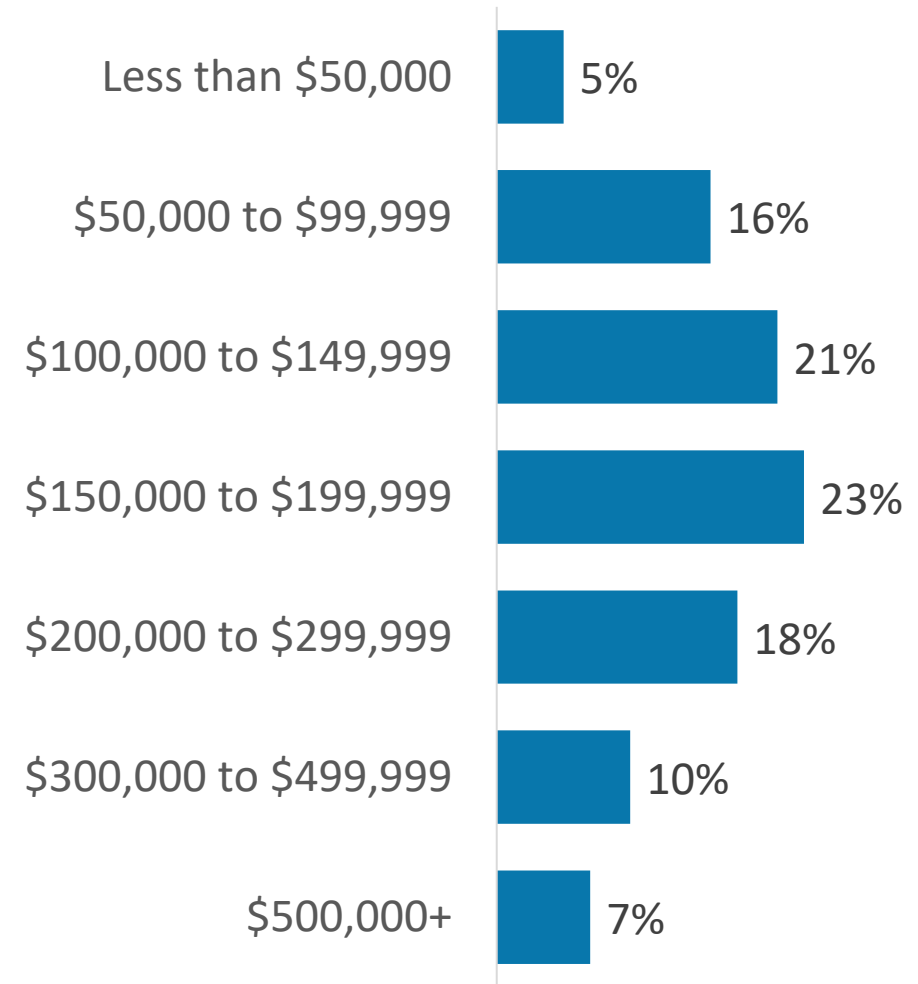


Median age of Spring visitors was **56 years old.**

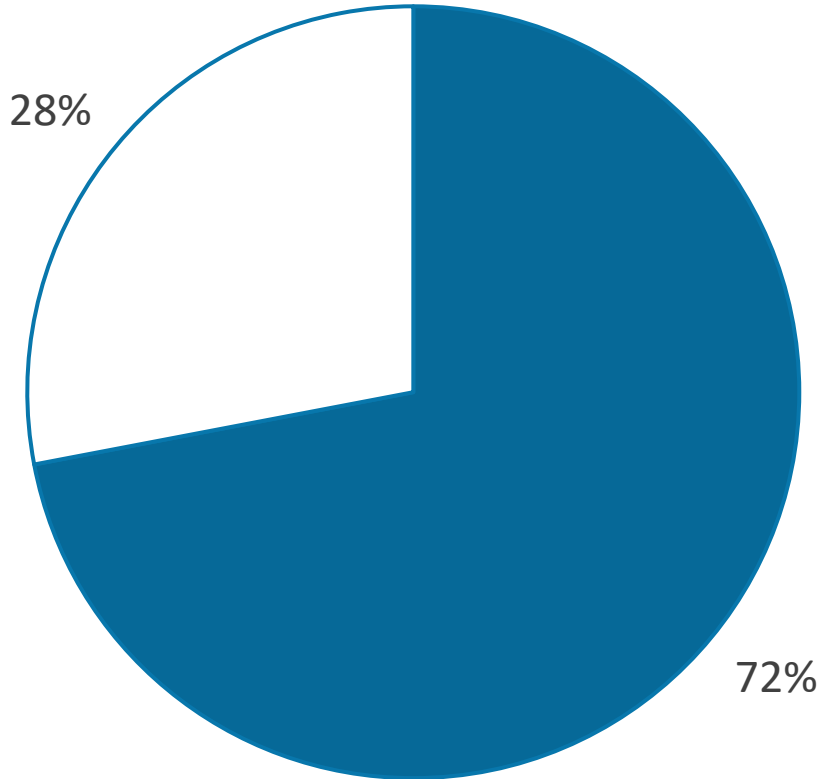


TOTAL HOUSEHOLD INCOME IN 2020

Spring visitors had a median household income of **\$167,400**.



GENDER



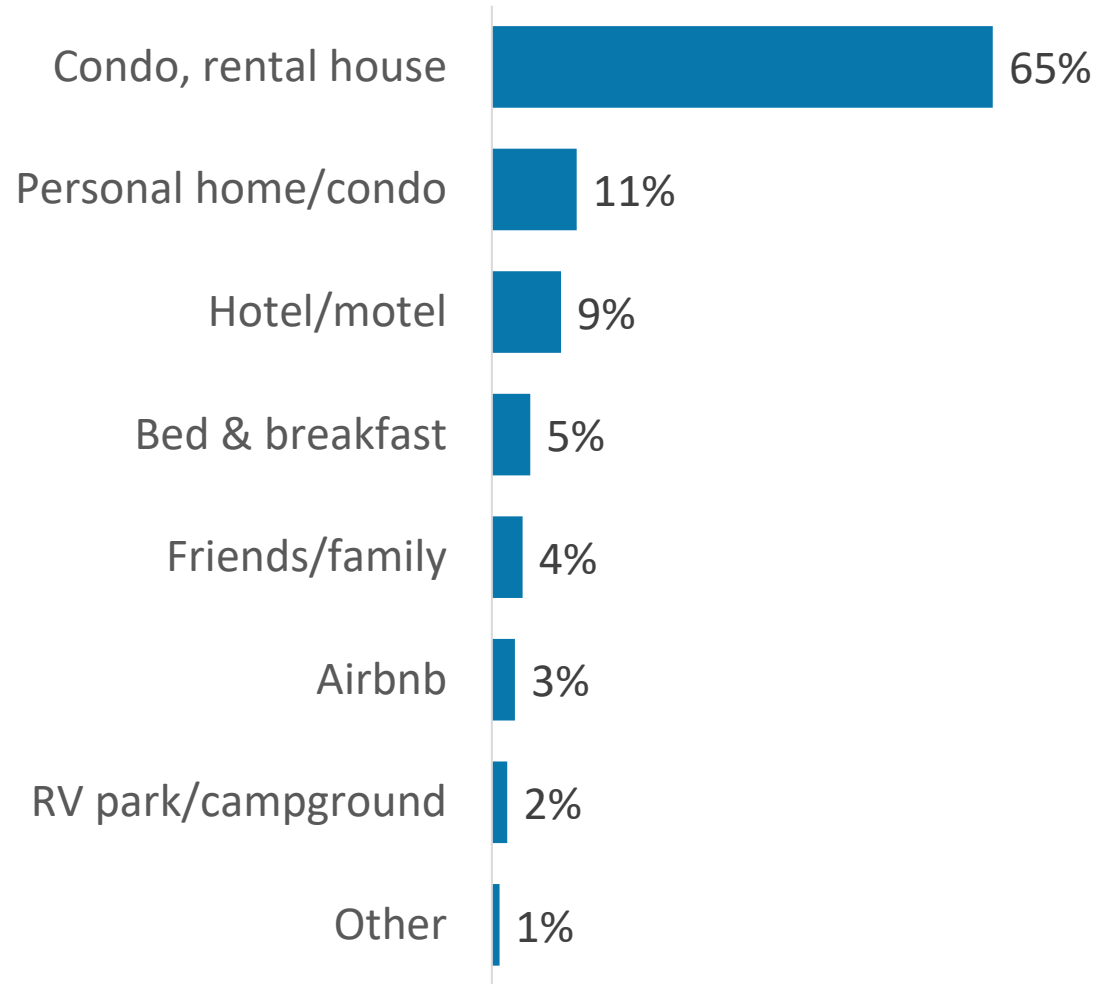
■ Female □ Male

Responses impacted by person more willing to be interviewed

VISITOR JOURNEY: TRIP EXPERIENCE



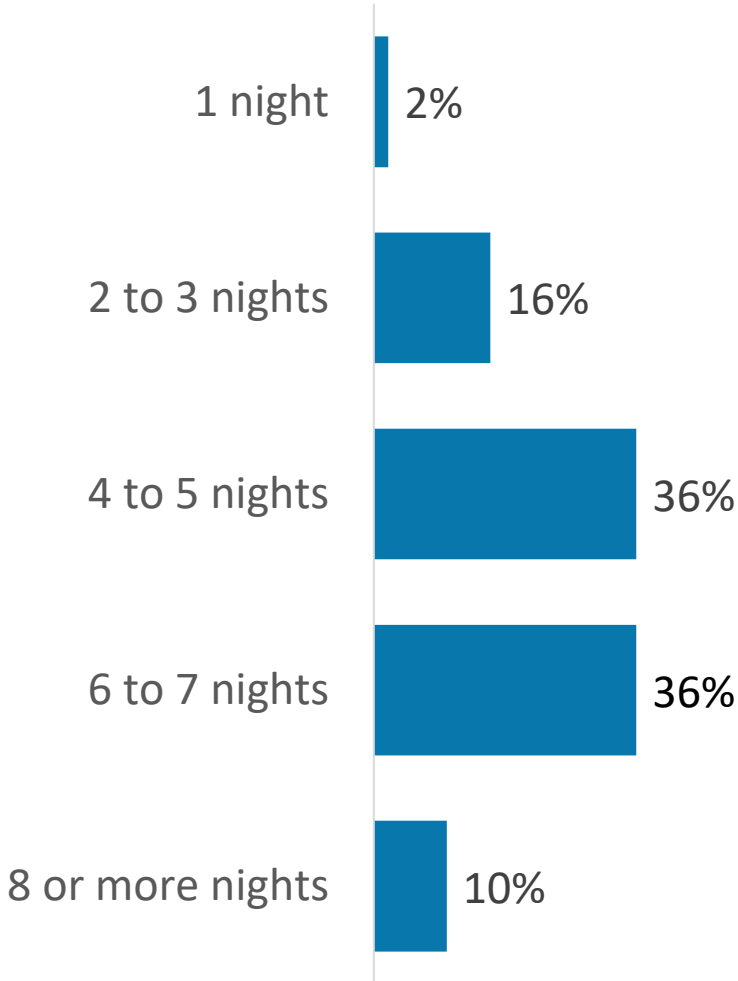
VISITOR'S PAID ACCOMMODATIONS



LENGTH OF STAY



Spring visitors¹ spent an average of **6.0** nights in South Walton.



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

NUMBER OF VISITS TO SOUTH WALTON

17% of Spring visitors were visiting for the first time.

Over 2 in 5 Spring visitors have visited South Walton more than 10 times.

That was my first time

17%

2 – 3

12%

4 – 5

11%

6 – 10

17%

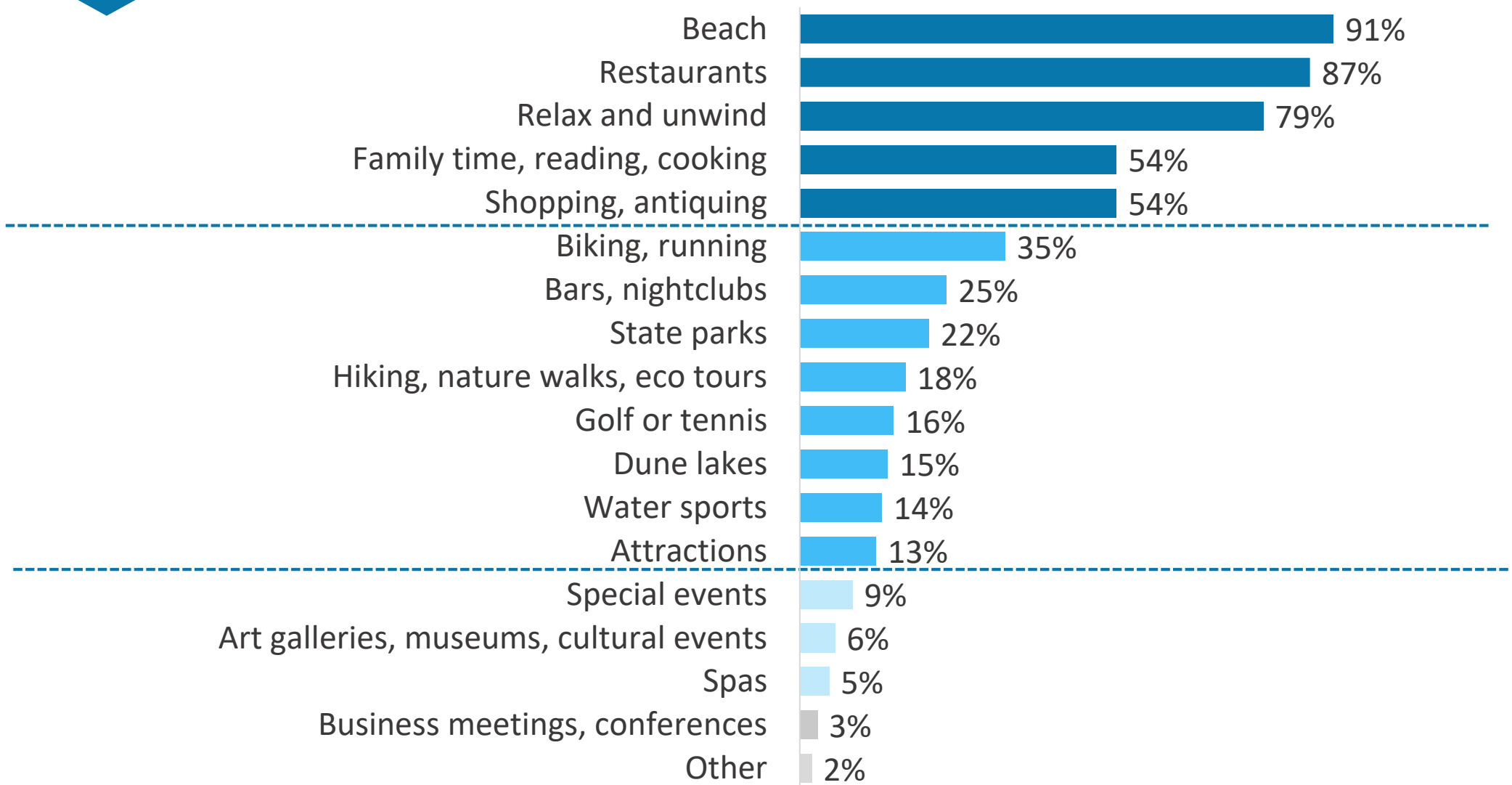
11 – 20

21%

21+

22%

VISITOR ACTIVITIES¹



¹Multiple responses permitted.

TYPICAL SOUTH WALTON TRAVEL PARTY EXPENSES¹

Visitor Metrics ¹	Average Daily Expenditure	Total Trip Expenditure
Accommodations	\$260	\$1,560
Restaurants	\$152	\$912
Groceries	\$56	\$336
Shopping	\$142	\$852
Entertainment	\$48	\$288
Transportation	\$52	\$312
Other	\$9	\$54
Total	\$719	\$4,314

VISITOR JOURNEY: POST-TRIP EVALUATION



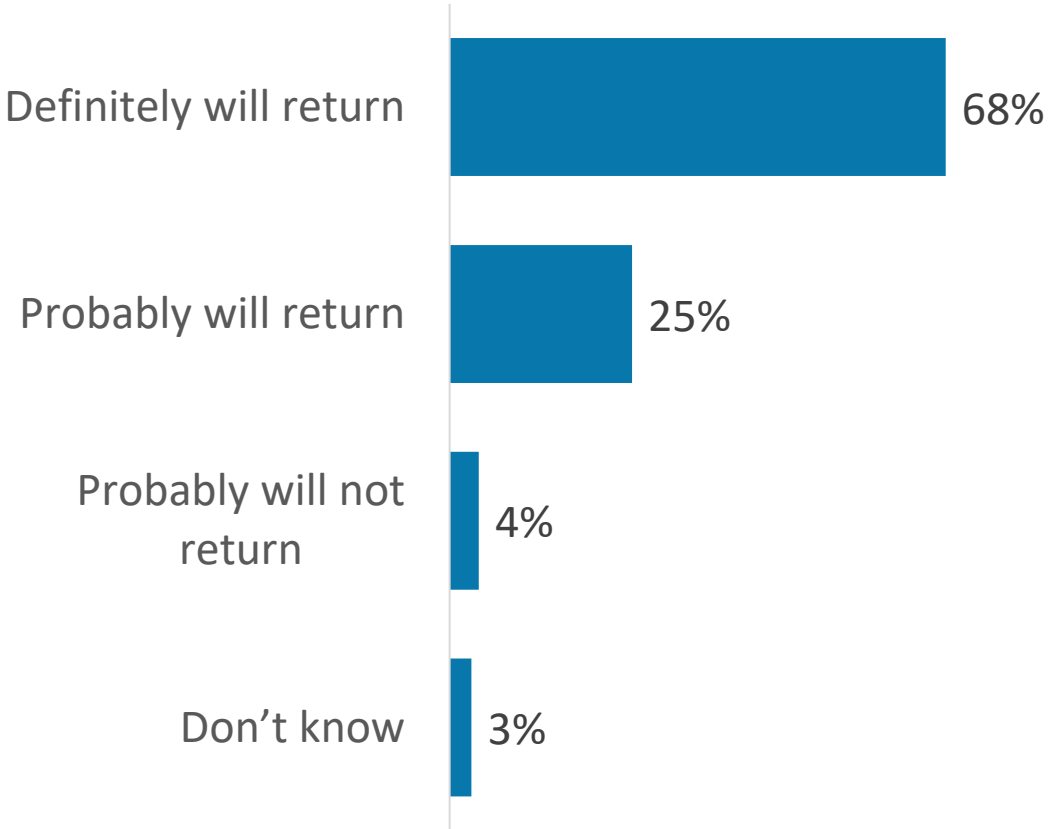
SATISFACTION WITH SOUTH WALTON



Visitors gave South Walton a rating of **8.9¹** as a place to vacation.



93% will return to South Walton.²



¹ 10 = Excellent; 1 = Poor

² 4% 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.

RATING SOUTH WALTON¹

Sugary white sand and turquoise blue waters



Pleasant place to unwind



Scenic beauty



Place you feel comfortable



Good place for family vacation



Customer service



Returning to familiar places, people



Having a variety of communities nearby



Value for your travel dollar



Place that's different and unique



Activities other than the beach



Cultural events & festivals



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

VISITOR DESCRIPTIONS OF SOUTH WALTON¹



¹ Coded verbatim responses.
Multiple responses permitted.

AREA DESCRIPTIONS*



Beautiful Beaches/White Sand/Clear Water

“Beautiful white sandy beaches with crystal clear blue water. Friendly people. Peaceful. Lovely views. Wonderful recreation for our family and safe.”

Beautiful Beaches/White Sand/Clear Water

“SoWal is a vividly wonderful, relaxing, serene, engaging place with warm water, warm climate and warm locals.”

Beautiful Beaches/White Sand/Clear Water

“I would describe it as a beautiful area with clean, pristine beaches and parks. The locals are friendly and there is amazing seafood. A perfect place to relax for a long weekend.”

*Coded open-ended responses.
Multiple responses permitted.

AREA DESCRIPTIONS*



Relaxing & Stress Free

“South Walton is a very relaxing place and while on the beach. Even with a group of people, it is very tranquil. Great shops and good music at most of the local places.”

Relaxing & Stress Free

“It is a calm, family-friendly area with many beach towns. There are many things to do for all ages, so you can decide how much you want to relax and how much you want to get out and do things.”

Relaxing & Stress Free

“An awesome place to go and unwind. It's small and quiet and has amazing places to go eat. The beaches are beautiful.”

*Coded open-ended responses.
Multiple responses permitted.

AREA DESCRIPTIONS*



Family Friendly

“A family friendly place with amazing beaches and attractions for the whole family. You will never be bored!”

Family Friendly

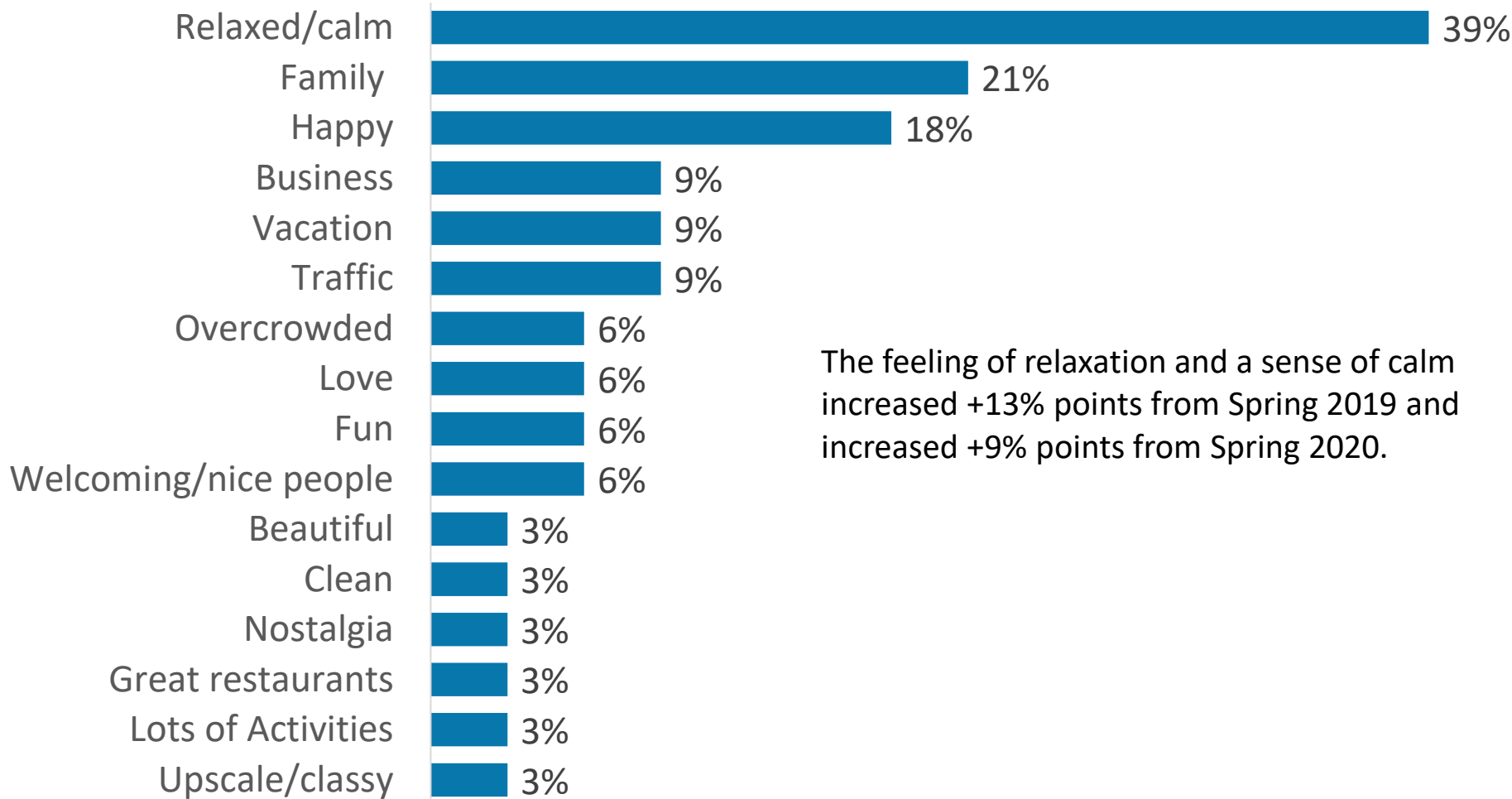
“The place to go for family events. They have beautiful beaches and vacation rentals. Gourmet restaurants with a view. Worth going!”

Family Friendly

“A wonderful, family-friendly beach experience with great restaurants and perfect sand.”

*Coded open-ended responses.
Multiple responses permitted.

EMOTIONS ASSOCIATED WITH SOUTH WALTON¹



The feeling of relaxation and a sense of calm increased +13% points from Spring 2019 and increased +9% points from Spring 2020.

¹ Coded verbatim responses. Multiple responses permitted.

VISIT SOUTH WALTON

Spring 2021 Visitor Tracking Study
March 2021 – May 2021

Joseph St. Germain, Ph.D., President
Phillip Downs, Ph.D., Senior Partner
Rachael Anglin, Director of Research
Erin Dinkel, Senior Project Director
Glencora Haskins, Project Director
Isiah Lewis, Project Director
Downs & St. Germain Research
850-906-3111 | www.dsg-research.com

