

FIRST-TIME VISITOR DECISION MAKING

June 2021

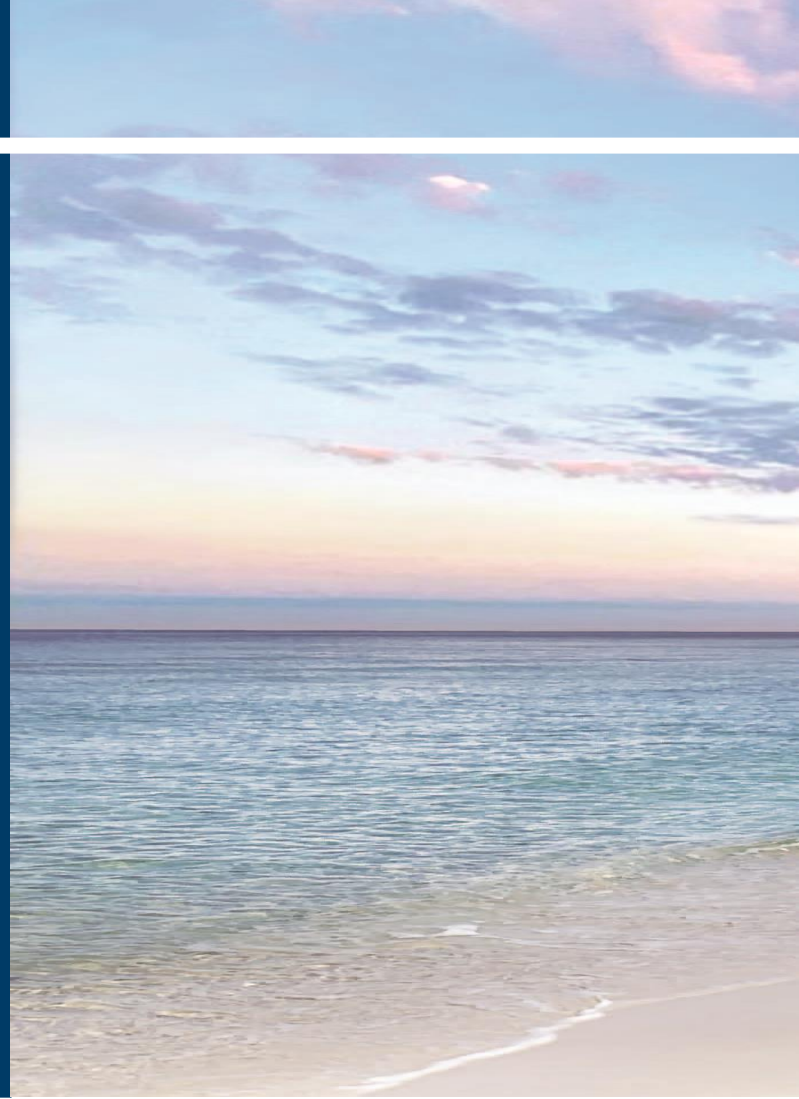


SOUTH WALTON
FLORIDA



downs & st. germain
RESEARCH

OBJECTIVES & METHODOLOGY



OBJECTIVES & METHODOLOGY

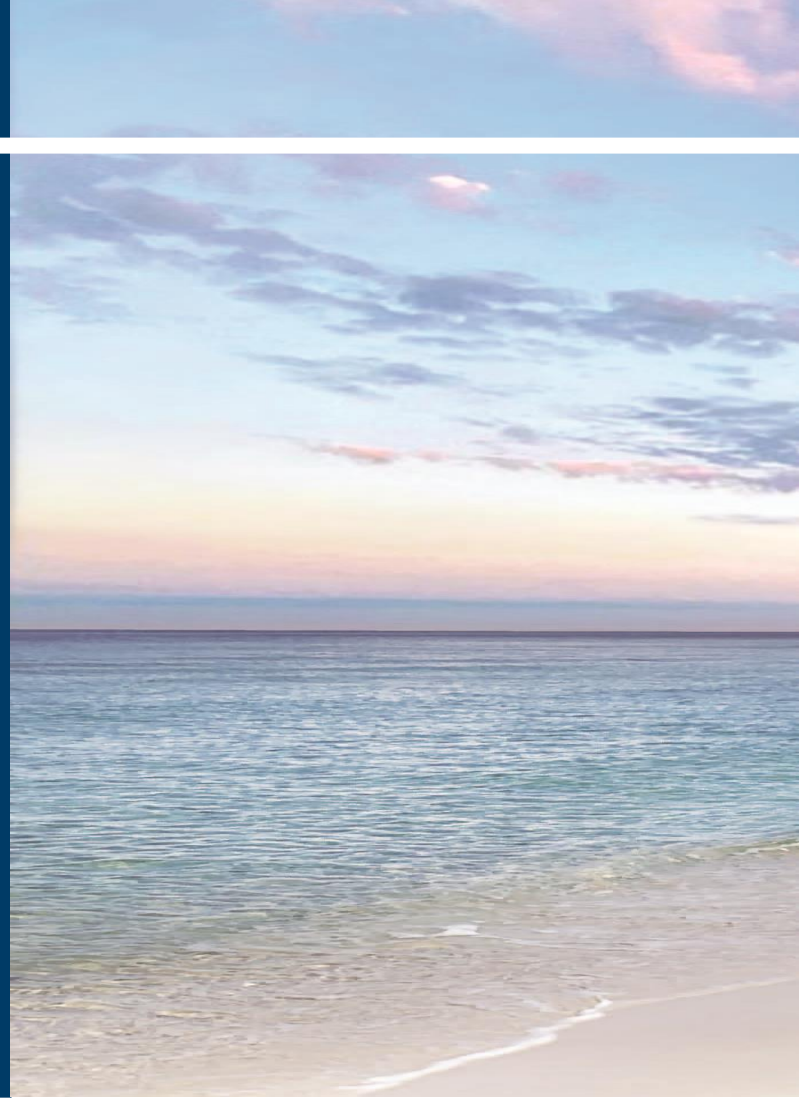
- » This study was conducted to explore visitors' vacation decision-making process and gain an understanding of how and why visitors choose to visit South Walton for the first time

- » An internet survey was completed by 216 first-time visitors to South Walton. This study is the second of a two-part research process to model visitors' decision-making process to visit South Walton

- » Prior to this study, two online focus groups were conducted with 32 first time visitors to South Walton, the results of which were used as the basis to develop the questionnaire used in this internet survey



KEY TAKEAWAYS

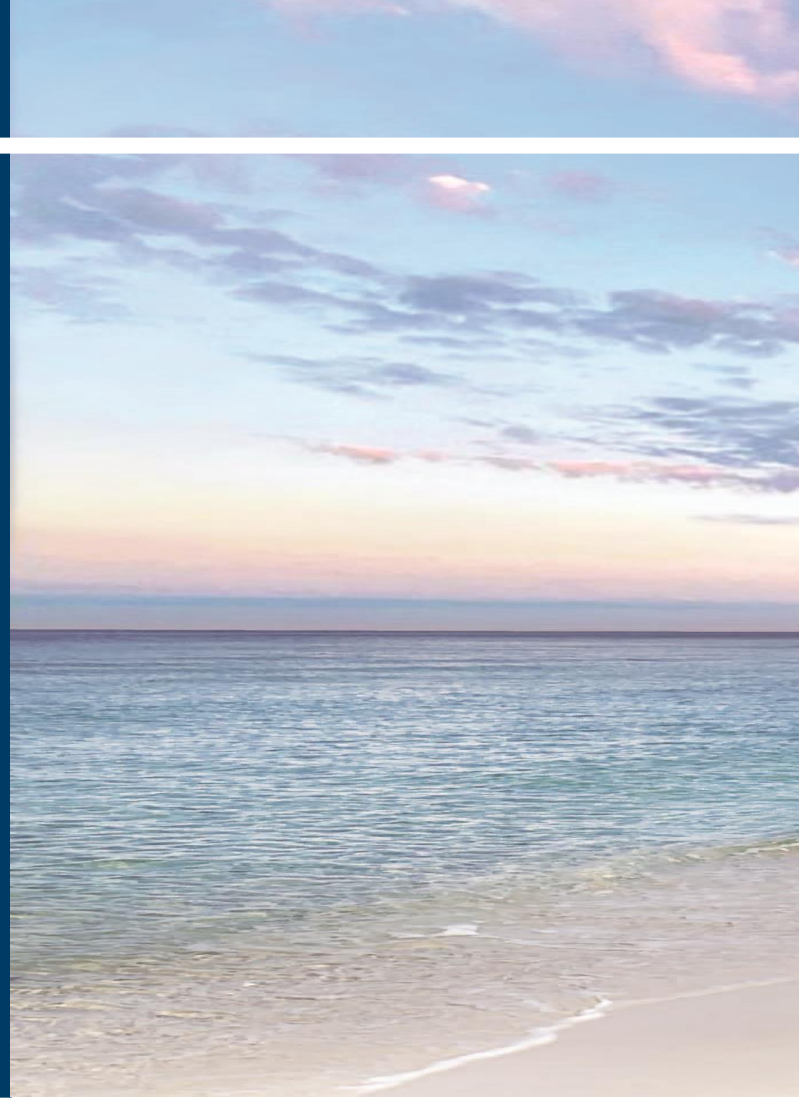


KEY TAKEAWAYS

- » The survey results largely confirmed the focus group findings, especially visitors' reliance on recommendations, advice, and experience from friends/family more than any other source
- » South Walton becomes a potential vacation destination through 3 possible decision pathways: **Word-of-Mouth, Online Sources, and Traditional Sources**
- » Visitors are **5 times** more likely to become aware of South Walton as a vacation destination from friends/family than any other source
- » Visitors **primarily search specifically for 1 of the 16 beach areas in South Walton (65%)** – most likely attributed to recommendations from friends/family experience in that beach neighborhood
- » Over **1 in 4** visitors recognize/refer to the South Walton area as **30A** and use this keyword in their searches
- » First-time visitors see themselves returning to South Walton in the future primarily because of the **beautiful beaches & clear blue water (70%)** – this was **2.5 times greater** than any other reason for returning to South Walton



DECISION PATHWAYS



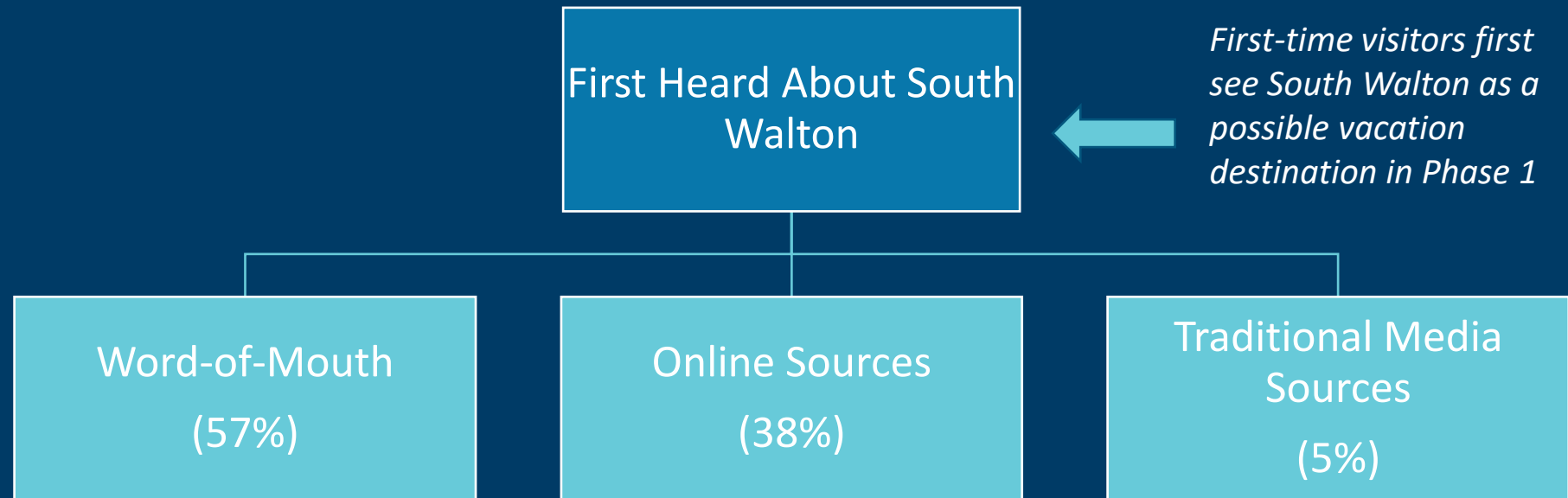
DECISION PATHWAYS

- » When planning a vacation, first-time visitors first decide they are going to take a beach vacation
- » Through their initial searches, South Walton becomes a potential vacation destination through 3 possible decision pathways:
 - » **Word-of-Mouth**
 - » **Online Sources**
 - » **Traditional Media Sources**
- » Each decision pathway follows along these phases:
 - » **Phase 1:** First introduction to South Walton via initial searches
 - » **Phase 2:** Gathering more information about South Walton through follow-up search methods
 - » **Phase 3:** Final decision to vacation in South Walton
- » The following slides will show the 3 possible decision pathways first-time visitors follow in deciding to vacation in South Walton
- » It is worth noting that while first-time visitors' initial introduction to South Walton as a vacation destination in Phase 1 is from a singular source, the subsequent sources they consult in Phase 2 and Phase 3 can occur together and simultaneously

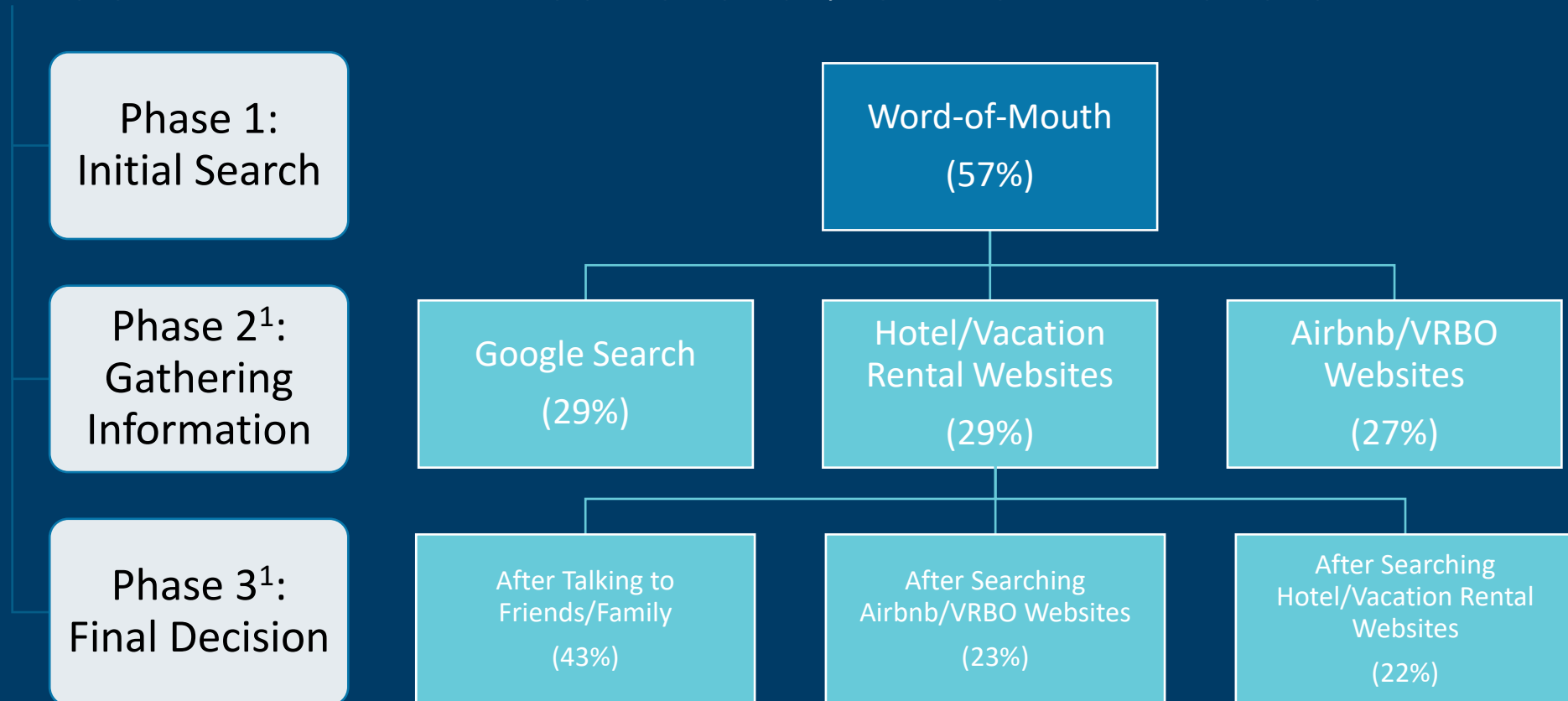


SOUTH WALTON FIRST-TIME VISITORS DECISION PATHWAYS

PHASE 1: FIRST LOOK INTO SOUTH WALTON AS A VACATION DESTINATION



DECISION PATHWAY #1 – ACCOUNTS FOR 57% OF FIRST-TIME VISITORS



- » **Phase 1:** 57% of first-time visitors first heard of South Walton as a vacation destination from friends/family
- » **Phase 2:** In their search for additional information about South Walton, ALL first-time visitors consulted multiple sources
- » **Phase 3:** ALL first-time visitors also made their final decision to vacation in South Walton after consulting multiple sources

¹ Percentages are for ALL first-time visitors.
Multiple responses permitted.

DECISION PATHWAY #1

REACHING THE WORD-OF-MOUTH VISITORS

Key Search Terms:

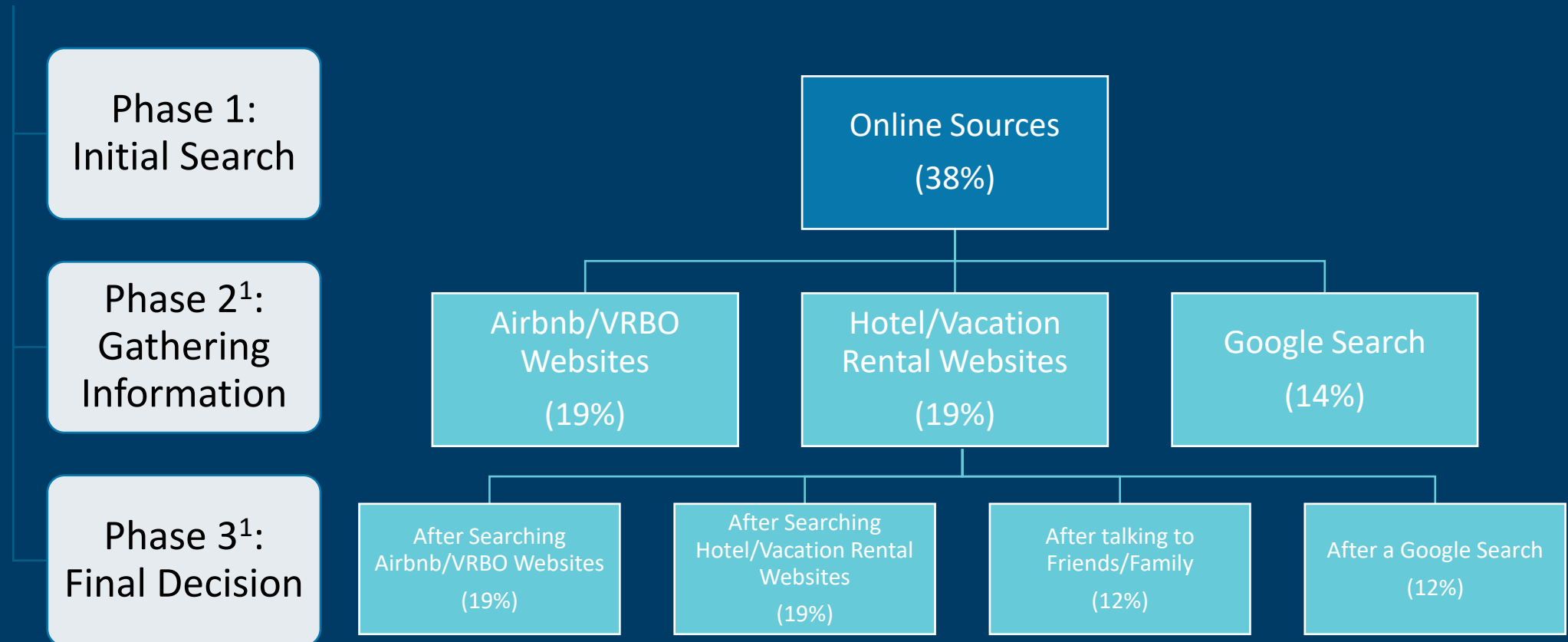
- » 1 of the 16 beach areas in South Walton
- » 30A
- » Beach/Beach-front/Ocean-front
- » Vacation Rental House
- » Destin/Pensacola/Panama City Beach
- » Florida/Florida Panhandle
- » Family friendly/family vacation
- » Activities/things to do

First-time visitors who follow this pathway talk to **friends and family** first in Phase 1 and again in Phase 3 to finalize their decision to vacation in South Walton

Potential first-time visitors who follow this pathway can be reached in two ways:

- 1) **Encourage social media interaction**, including photos, posts, blogs, reviews, hashtags, etc., to open the conversation about a South Walton vacation between friends/family/co-workers/etc.
- 2) **Create, maintain, and ensure a positive experience** for vacationers in South Walton who will share their experiences, stories, and emotions with their friends/family/co-workers/etc.

DECISION PATHWAY #2 – ACCOUNTS FOR 38% OF FIRST-TIME VISITORS



- » **Phase 1:** 38% of first-time visitors first heard of South Walton as a vacation destination through online sources
- » **Phase 2:** In their search for additional information about South Walton, ALL first-time visitors consulted multiple sources
- » **Phase 3:** ALL first-time visitors also made their final decision to vacation in South Walton after consulting multiple sources

¹ Percentages are for ALL first-time visitors.
Multiple responses permitted.

DECISION PATHWAY #2

REACHING THE ONLINE SOURCE VISITOR

Key Search Terms:

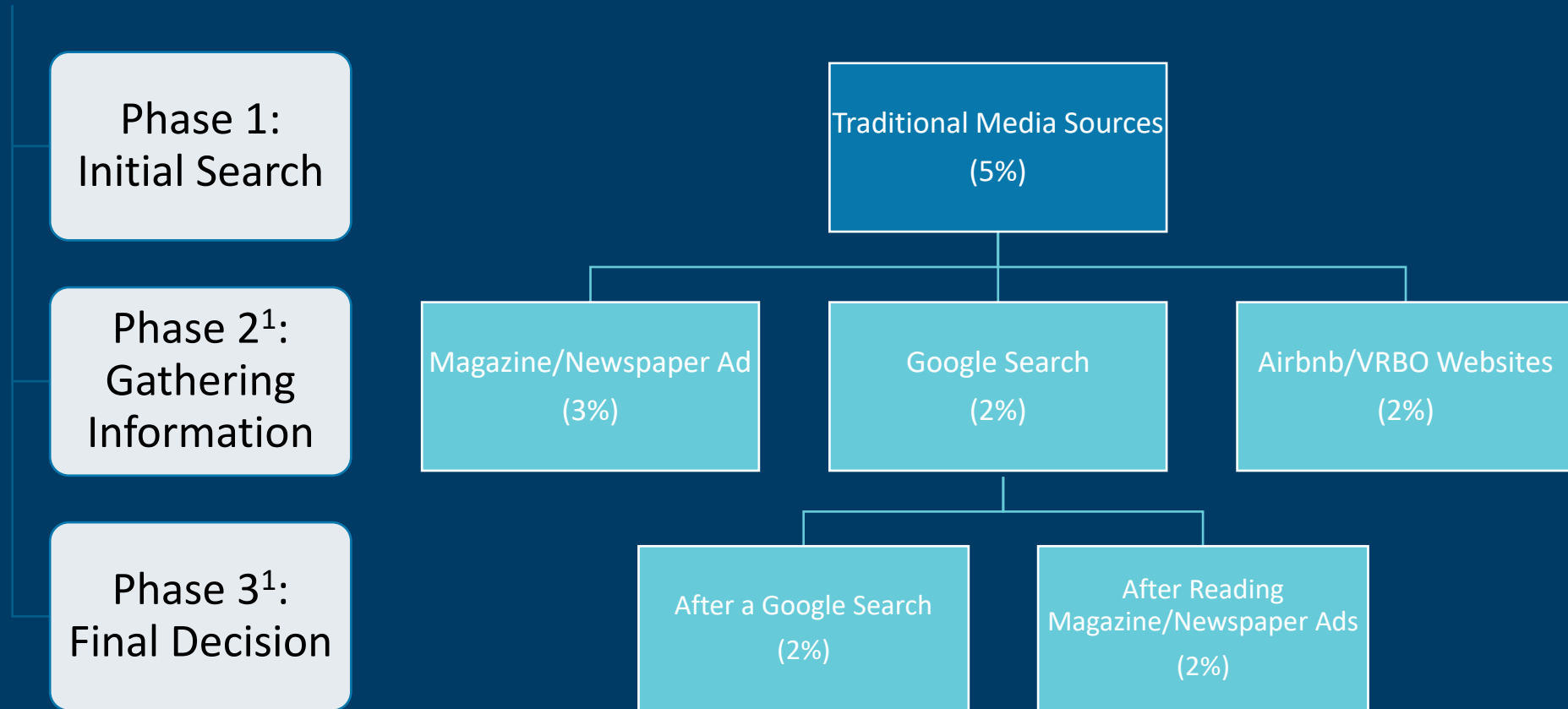
- » Beach/Beach-front/Ocean-front
- » 1 of the 16 beach areas in South Walton
- » Vacation Rental House
- » Florida/Florida Panhandle
- » 30A
- » Destin/Pensacola/Panama City Beach
- » Gulf Coast
- » Pool/Private Pool

First-time visitors who follow this pathway actively search online for vacation destinations in Phase 1 and again in Phase 3 to finalize their decision to vacation in South Walton

Potential first-time visitors who follow this pathway can be reached through **online advertisement** focusing on vacation rental websites such as Airbnb, VRBO, etc.

These first-time visitors will often consult sources other than friends/family throughout their decision process, however they will talk to friends and family for the final decision in Phase 3

DECISION PATHWAY #3 – ACCOUNTS FOR 5% OF FIRST-TIME VISITORS



- » **Phase 1:** 5% of first-time visitors first heard of South Walton as a vacation destination via traditional media sources
- » **Phase 2:** In their search for additional information about South Walton, ALL first-time visitors consulted multiple sources
- » **Phase 3:** ALL first-time visitors also made their final decision to vacation in South Walton after consulting multiple sources

¹ Percentages are for ALL first-time visitors.
Multiple responses permitted.

DECISION PATHWAY #3

REACHING THE TRADITIONAL MEDIA SOURCE VISITOR

Key Search Terms:

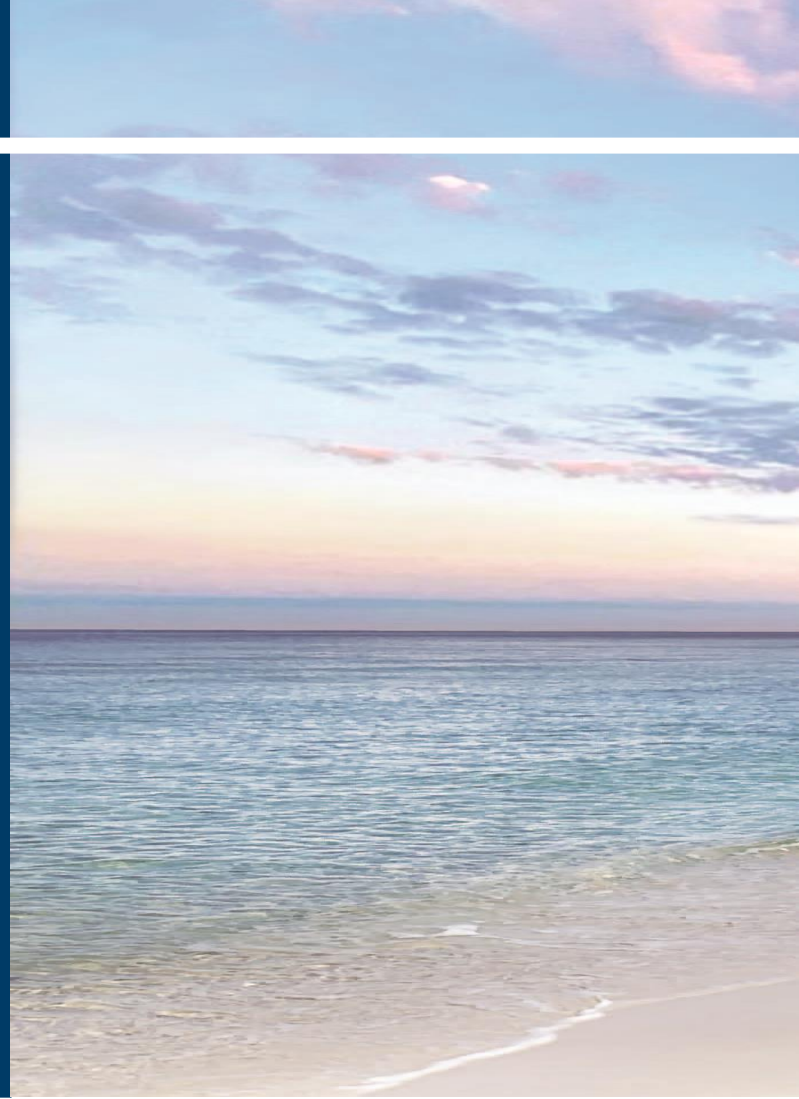
- » 1 of the 16 beach areas in South Walton
- » 30A
- » Beach/Beachfront/Oceanfront
- » Vacation Rental House
- » Florida/Florida Panhandle
- » Gulf Coast
- » Restaurant
- » Activities/things to do
- » Hotel

First-time visitors who follow this pathway first find out about South Walton through traditional media sources, primarily magazine/newspaper ads, billboards, and bumper stickers

Few online sources are used in this pathway, although Google is used in both Phase 2 and Phase 3

Very few first-time visitors fall into this decision pathway

EXECUTIVE SUMMMARY



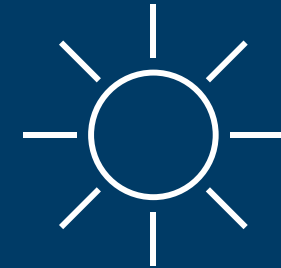
FIRST-TIME VISITOR TRIP PLANNING PROCESS:

1. WHAT TYPE OF VACATION?



Visitors start their vacation planning by thinking about the type of vacation experience they want

82% of first-time visitors already decide they are going to take a beach vacation



This is typically determined based on the season

53% of first-time visitors say the season **almost always** determines the type of trip

2. WHERE TO GO + GATHERING INFORMATION



Visitors trust the recommendations and past experiences of their friends and family

Nearly 9 in 10 South Walton first-time visitors consult friends/family at least once in their vacation planning process and search for more information



Visitors begin their searches on Google or vacation rental websites

Nearly **50%** of first-time visitors search **hotel or vacation rental websites or Airbnb/VRBO**

3. IMPORTANT DECIDING FACTORS

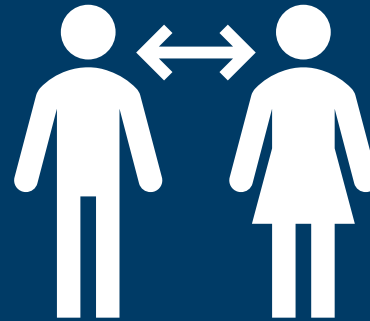


First-time visitors consider several factors when deciding to vacation in South Walton:

- » Hanging out at the beach **(60%)**,
- » Finding a place to totally relax & unwind **(54%)**,
- » The natural beauty of the area **(48%)**, and
- » A place where family could spend bonding time together **(42%)**

Were the most important decision factors

4. SEALING THE DEAL



Recommendations from friends and family strongly influence visitors' decisions to vacation in South Walton **(56%)**

Supporting information from searches on:

- » Airbnb/VRBO, etc. websites **(44%)**
- » Hotel/vacation rental sites **(41%)**

helped to seal the deal

5. CHILDRENS ROLE IN PLANNING



2 in 5 first-time visitors took a multi-generational family vacation on their last trip to South Walton

Children under 20 play a significant role in the decision to vacation in South Walton (**47%** of those who traveled with children under 20)

Adult children¹ have even more say as **67%** of those who traveled with adult children say they have a significant role in the decision process

6. TRANSPORTATION



First-time visitors appreciate the convenience and price of driving

59% of first-time visitors say their mode of travel has a **major influence** on the decision to vacation in South Walton

7. EMOTIONS + SHARING THE EXPERIENCE



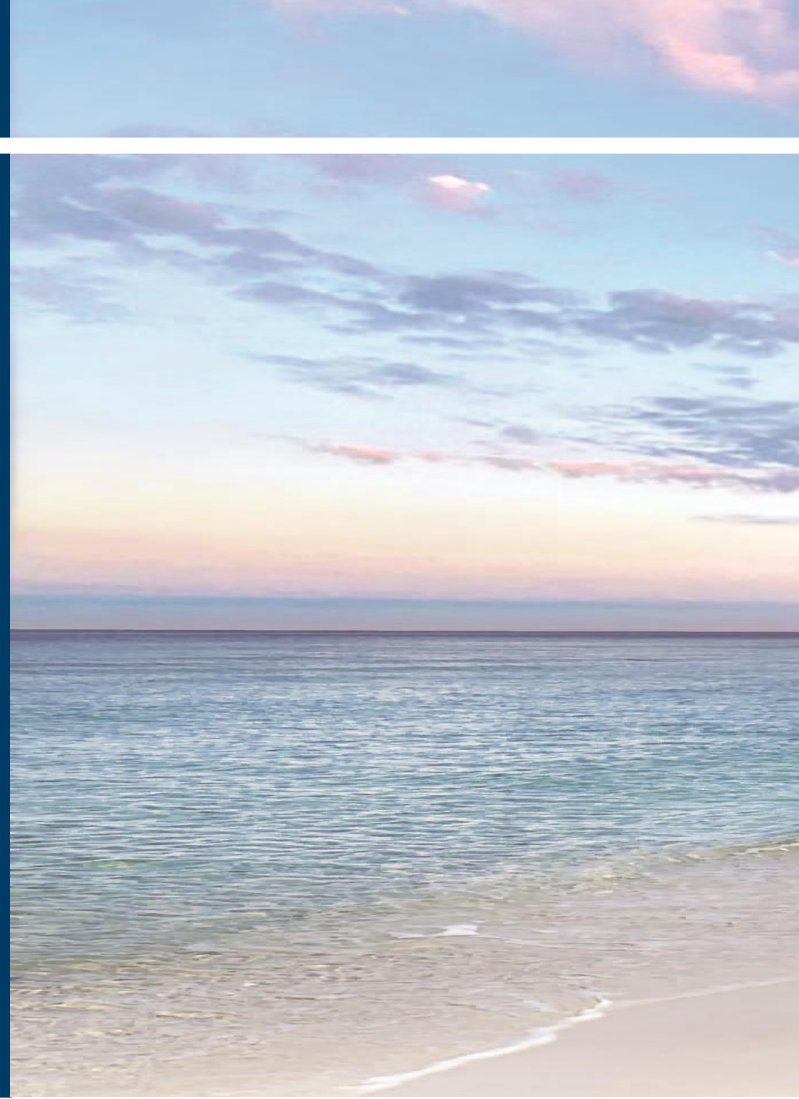
First-time visitors see themselves returning to South Walton in the future primarily because of the beautiful beaches & clear blue water (**70%**)

The beautiful beaches & clear blue water was mentioned **2.5 times more** than any other reason for returning to South Walton



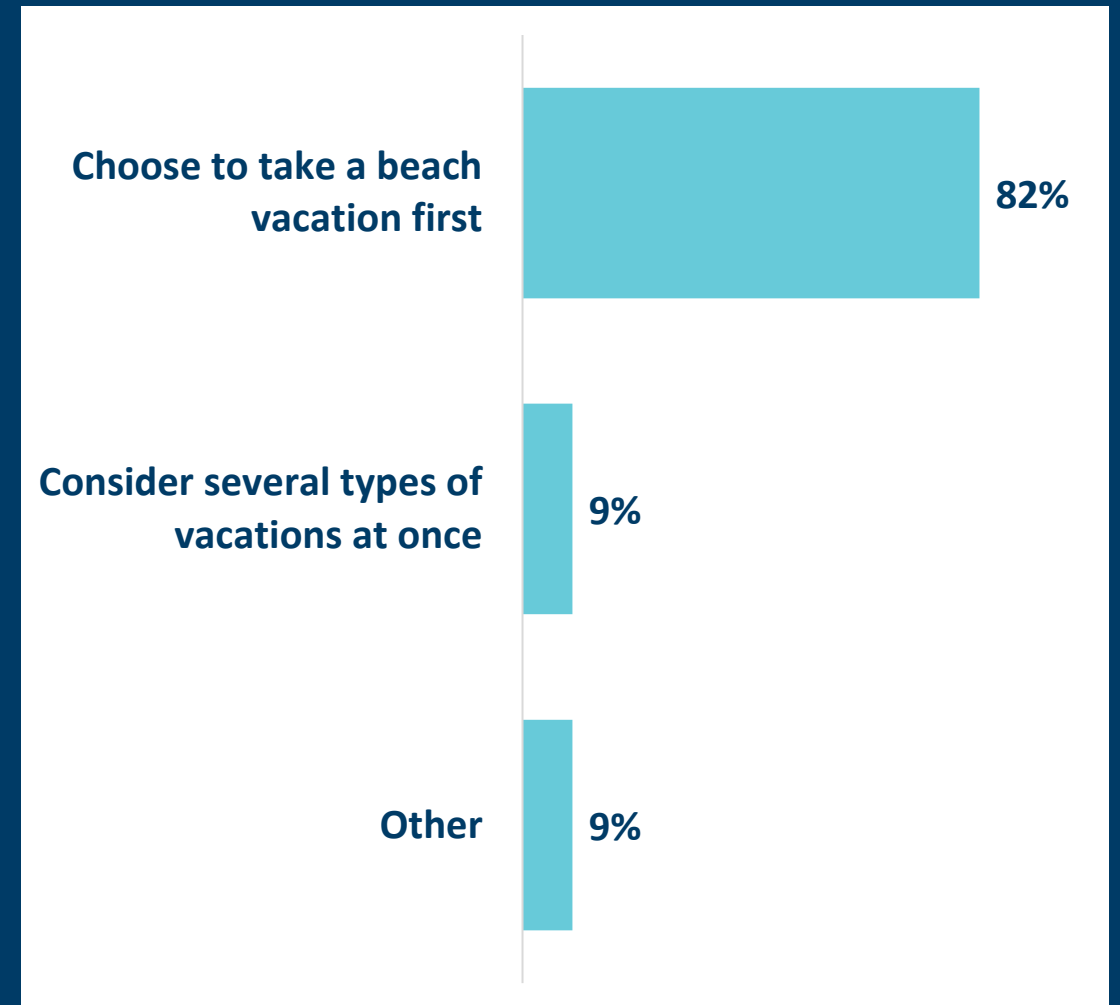
Visitors are likely to share their vacation photos on social media, although most (**64%**) would only share a photo or two to update friends and family

DETAILED FINDINGS



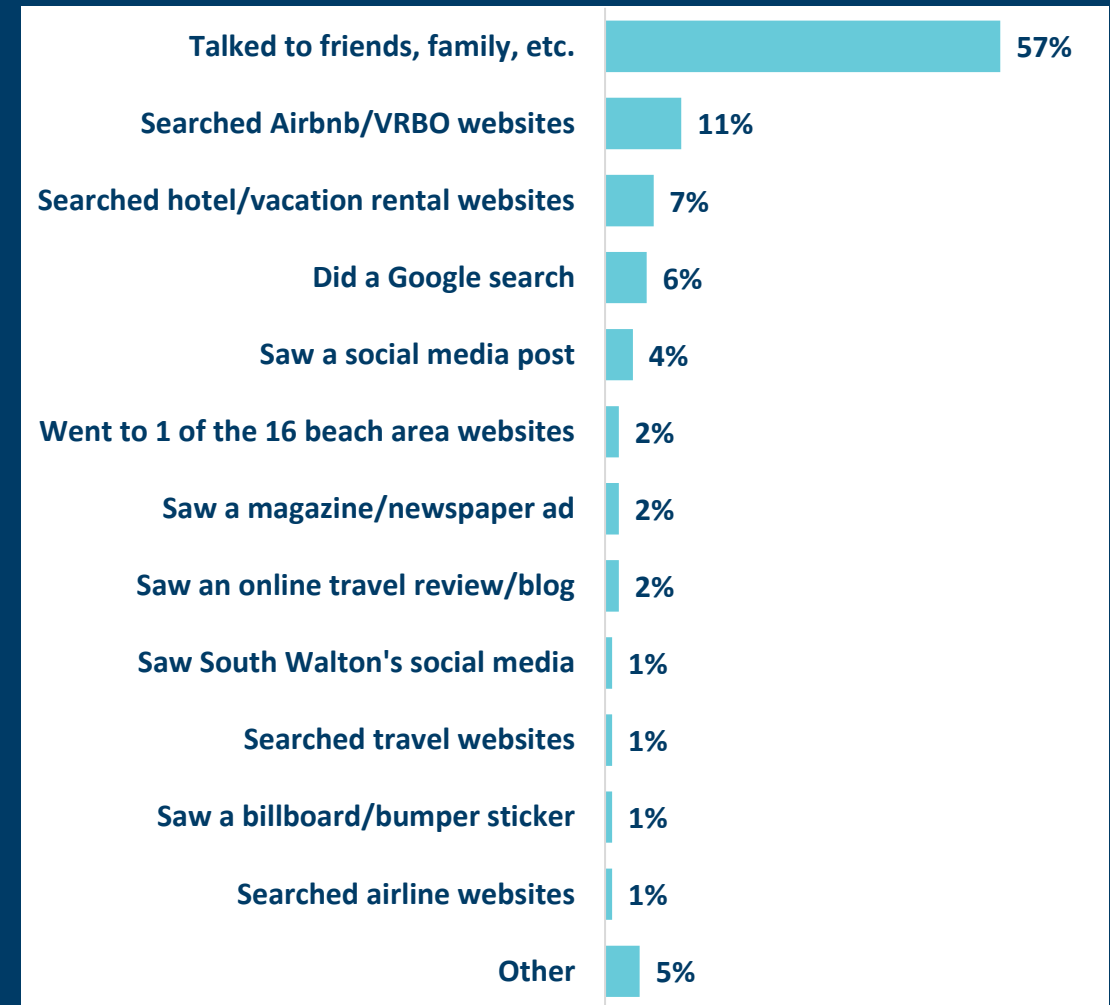
WHEN YOU STARTED THINKING ABOUT TAKING A VACATION TO SOUTH WALTON, DID YOU:

- » **4 in 5** first-time visitors already decided they were going to take a **beach vacation** when they started to think about taking a vacation to South Walton



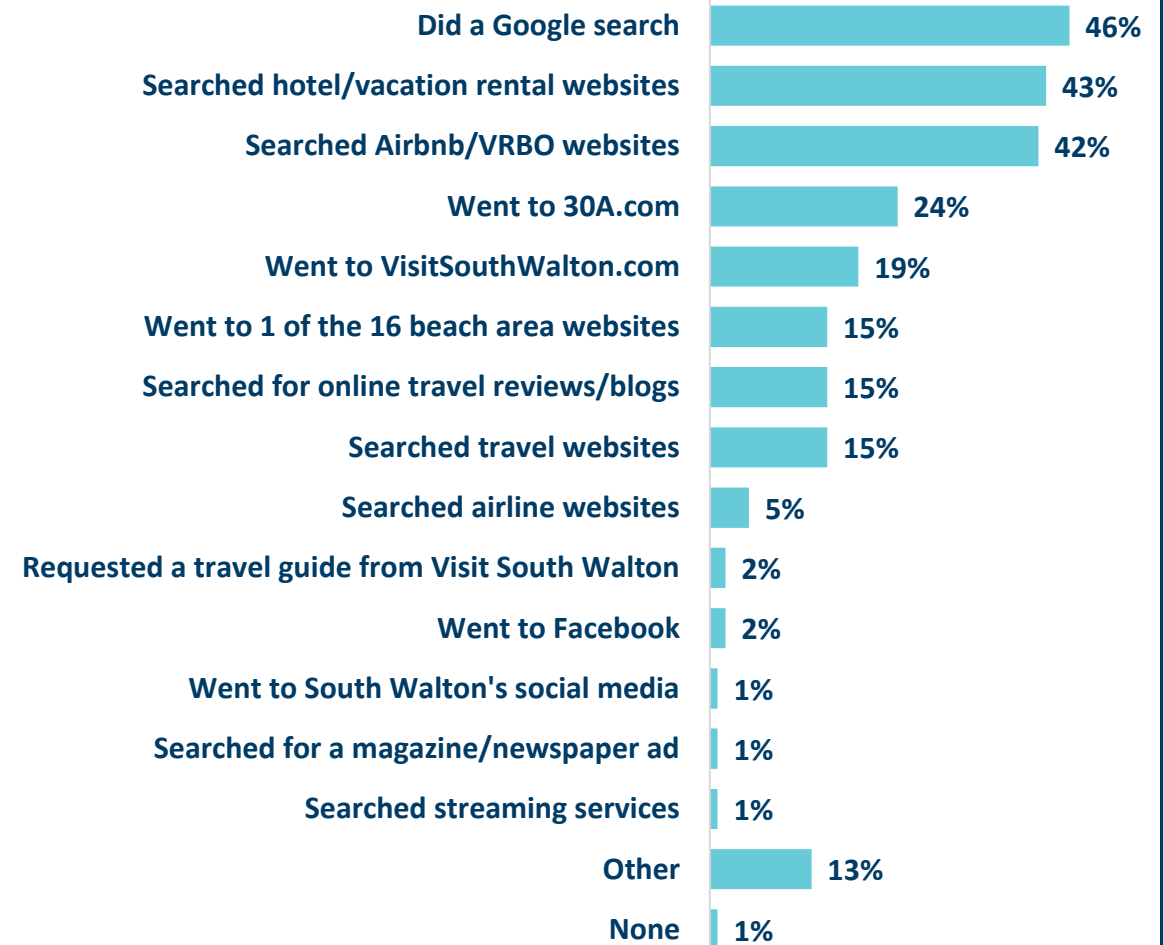
HOW DID SOUTH WALTON FIRST GET ON YOUR RADAR AS A POSSIBLE VACATION DESTINATION?

- » First-time visitors **overwhelmingly listed talking to friends, family, etc.**, as the reason South Walton first got on their radar as a vacation destination – **5 times** more than any other source
- » **Only about 1 in 10** first-time visitors became aware of South Walton through searches on Airbnb, VRBO, etc.



AFTER TALKING TO FRIENDS, FAMILY, CO-WORKERS, ETC., ABOUT SOUTH WALTON, WHAT DID YOU DO NEXT TO FIND OUT MORE ABOUT SOUTH WALTON?¹

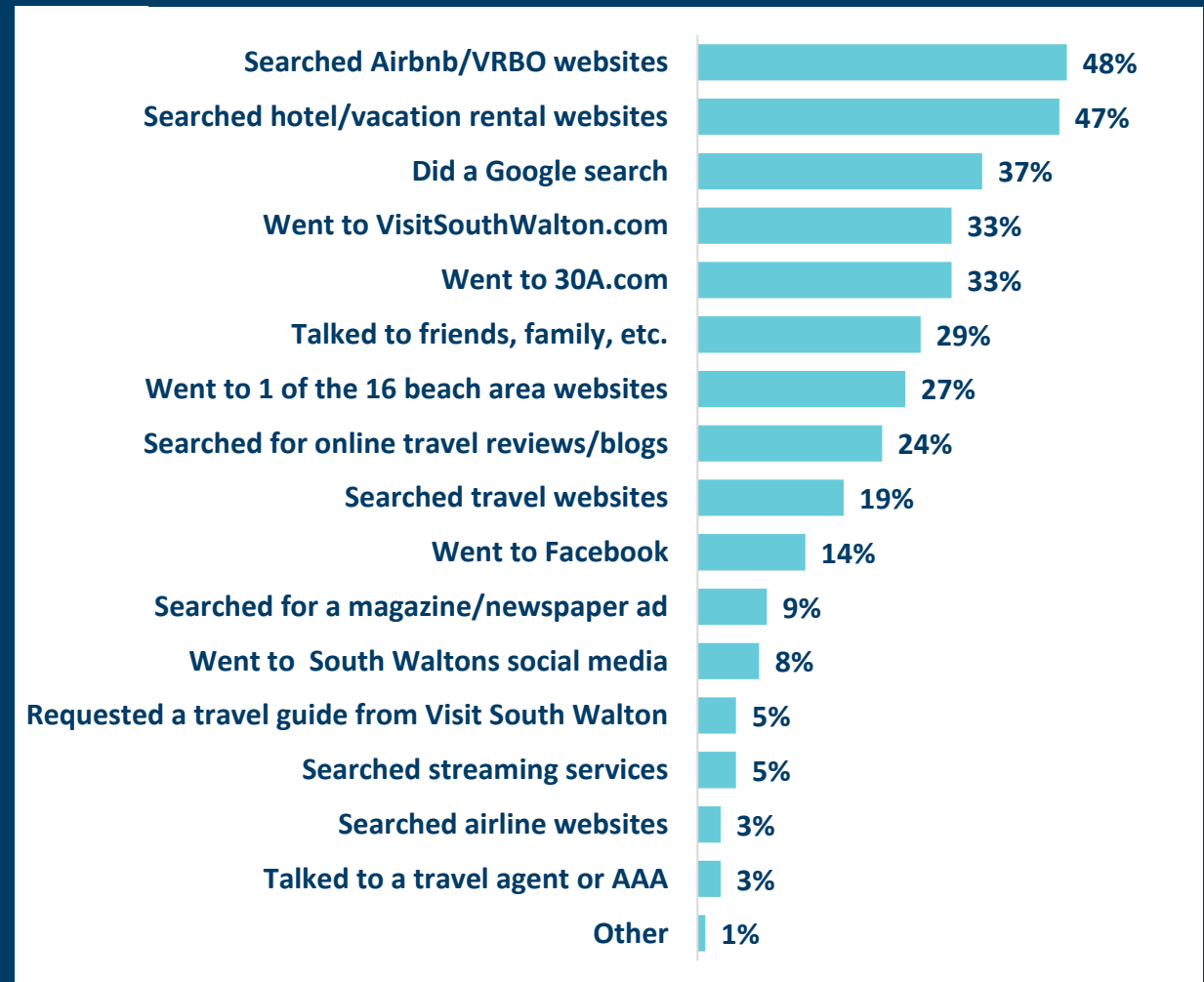
- » After first hearing about South Walton as a destination from friends/family, over **2 in 5** first-time visitors searched **Google, hotel or vacation rental websites, Airbnb, VRBO, etc. websites** next



¹ Those who answered this question first became aware of South Walton as a vacation destination through friends, family, co-workers, etc. Multiple responses permitted.

WHAT ELSE DID YOU DO TO INVESTIGATE SOUTH WALTON AS A POSSIBLE TRAVEL DESTINATION?¹

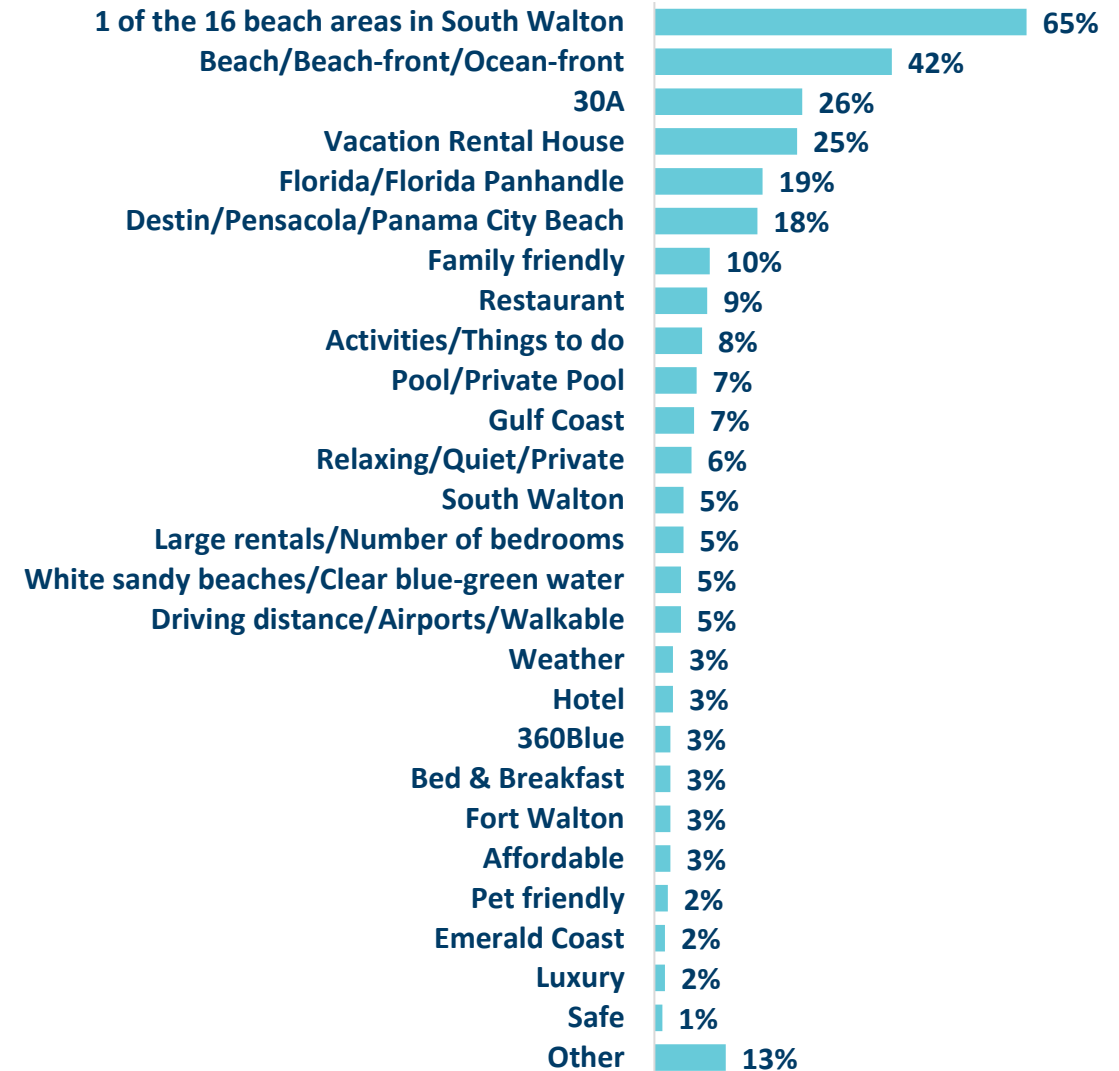
- » After first hearing about South Walton as a destination, **half** of first-time visitors searched **Airbnb, VRBO, etc. websites** and **hotel or vacation rental websites**
- » Nearly **2 in 5** visitors did **Google search**
- » **1 in 3** first-time visitors visited **VisitSouthWalton.com** and **30A.com** to investigate South Walton



¹ Those who answered this question first became aware of South Walton as a vacation destination through sources other than friends, family, co-workers, etc. Multiple responses permitted.

KEYWORDS SEARCHED¹

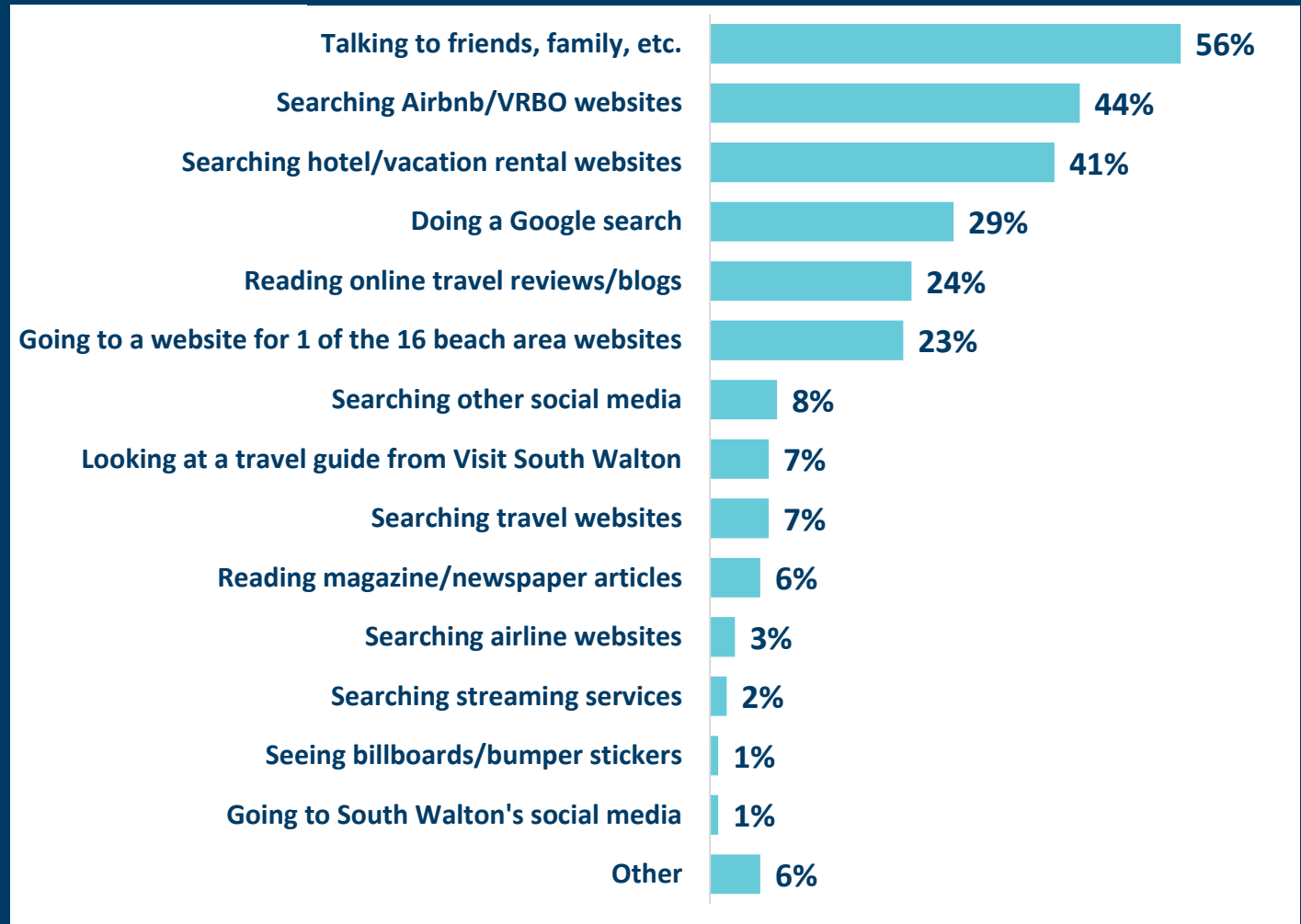
- » Over **3 in 5** first-time visitors who did an internet search, searched for **1 of the 16 beach areas in South Walton** – Most likely due to friends/family experience in that beach area
- » Over **2 in 5** searched simply for **beach, beach-front, or ocean-front**
- » About **1 in 4** visitors searched for **30A or vacation rental accommodations**



¹ Coded open-ended responses.
Multiple responses permitted.

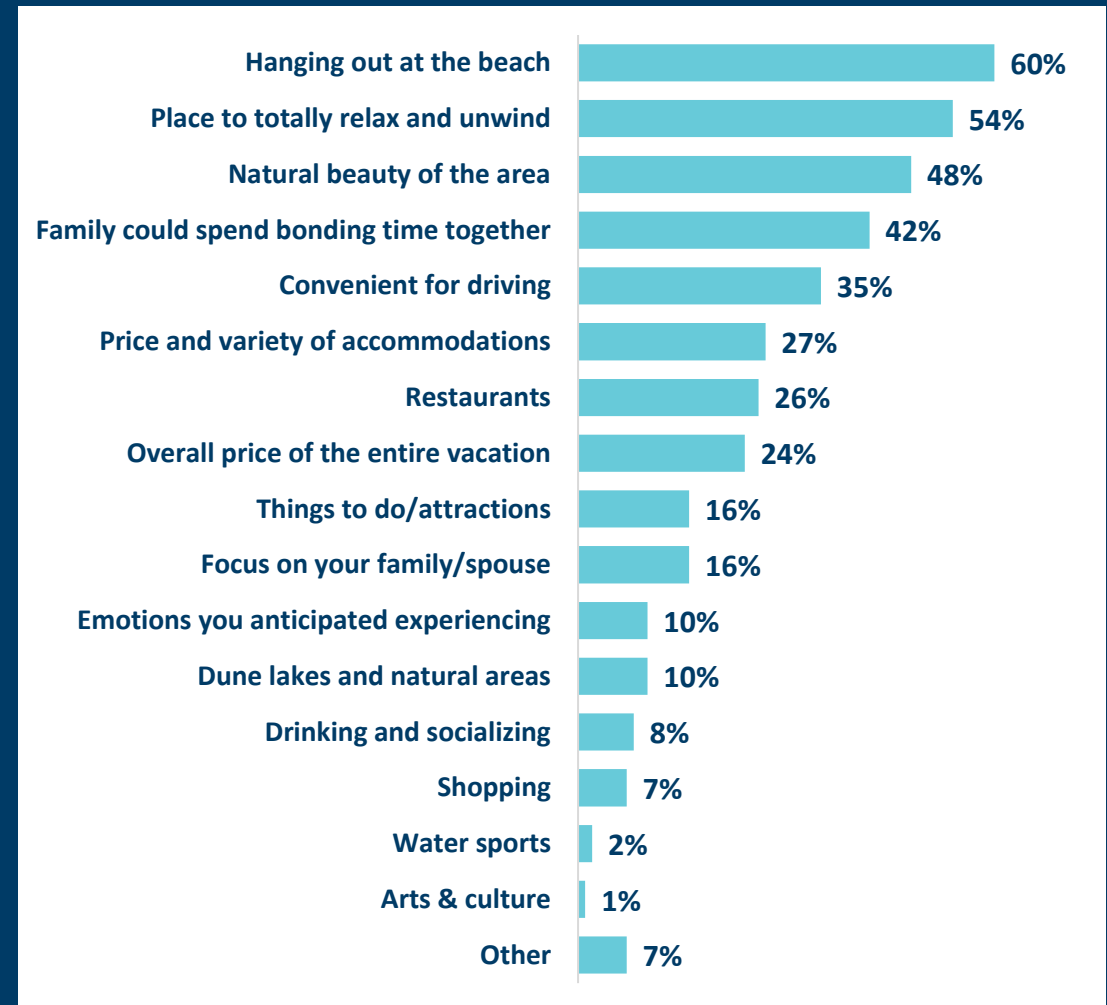
AT WHAT POINT WERE YOU CONVINCED YOU WERE GOING TO SOUTH WALTON, AS OPPOSED TO SOME OTHER DESTINATION, FOR A VACATION?¹

- » Nearly **3 in 5** first-time visitors were convinced they were going to vacation in South Walton after **talking to friends and family**
- » Over **2 in 5** first-time visitors become convinced after **searching on Airbnb, VRBO, etc. websites or from searching hotel or vacation rental websites**



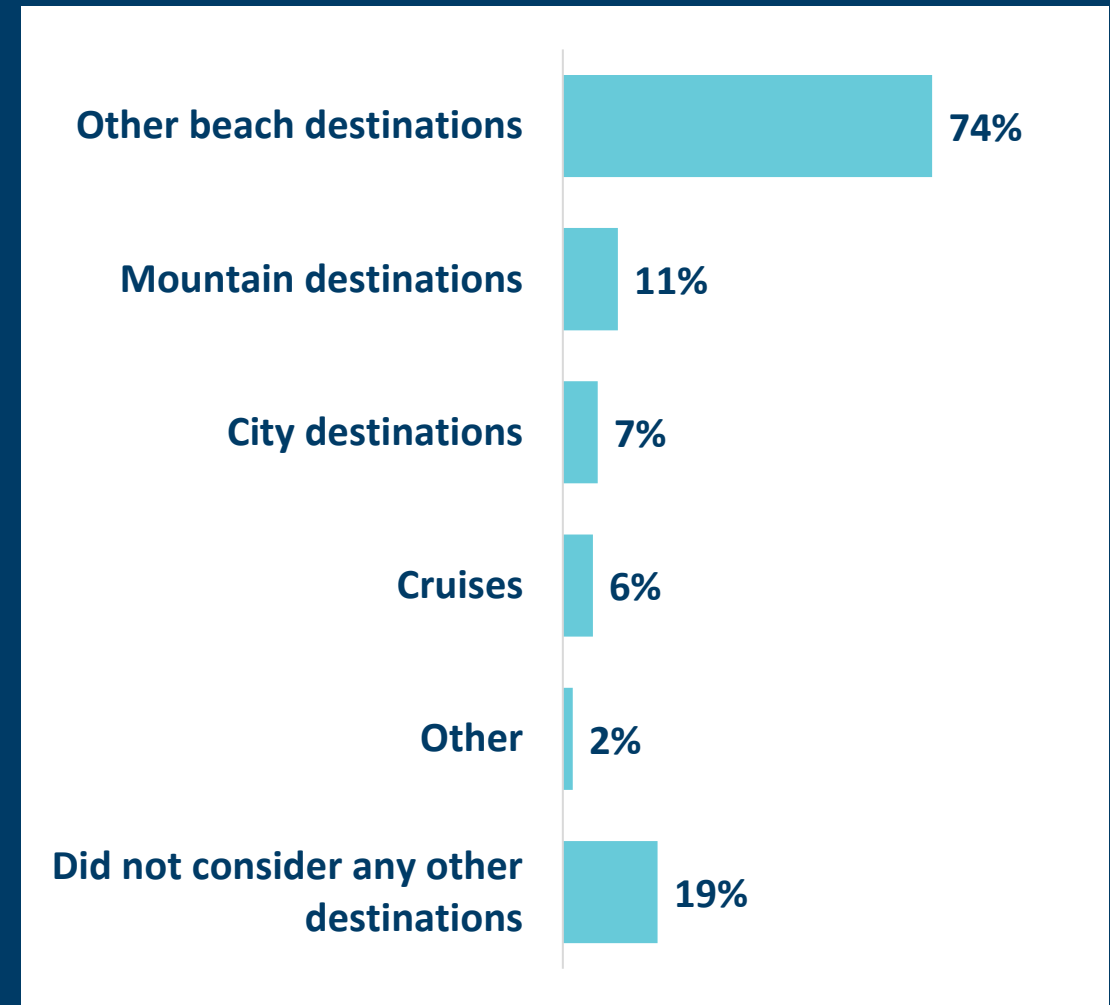
WHICH OF THE FOLLOWING WERE MORE IMPORTANT IN DECIDING TO VACATION IN SOUTH WALTON?¹

- » While deciding to vacation in South Walton, **3 in 5** first-time visitors listed **hanging out at the beach** as an important factor
- » **Half** of first-time visitors consider a place to **totally relax and unwind**, **natural beauty of the area** top priorities in their decision
- » Over **2 in 5** visitors see a **place where the family could spend some bonding time together** as a top priority in their decision



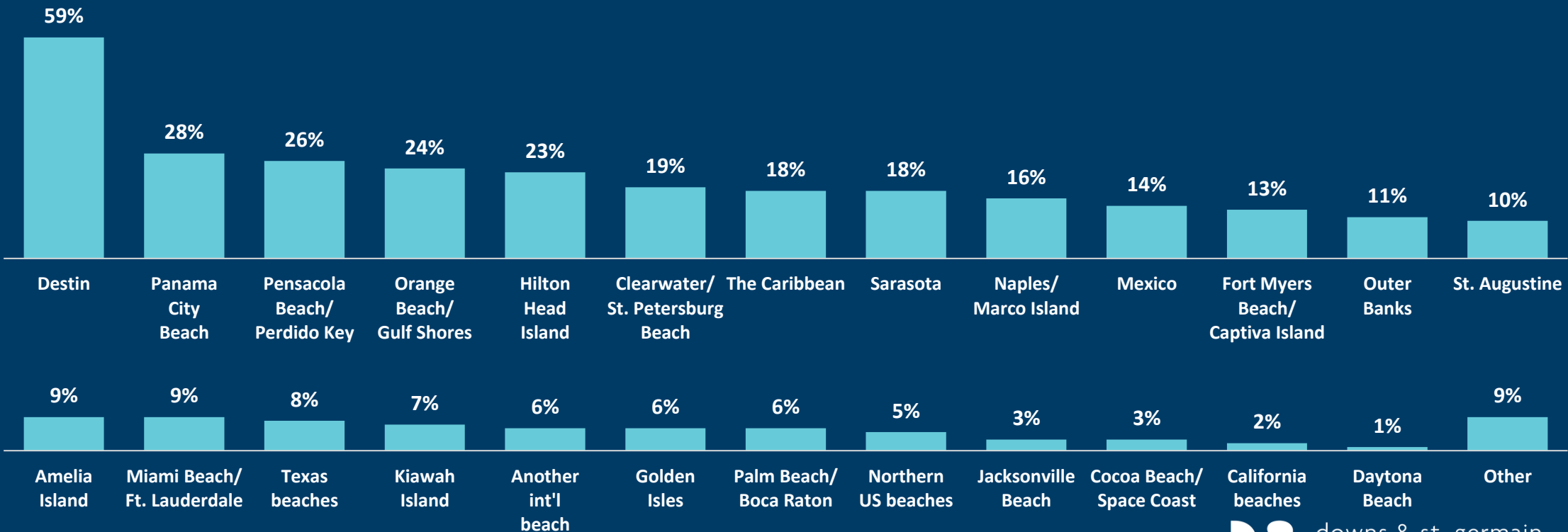
WHEN CONSIDERING VISITING SOUTH WALTON FOR THE FIRST TIME, WHAT OTHER DESTINATIONS DID YOU CONSIDER

- » When considering visiting South Walton, over **7 in 10** first-time visitors were also considering **other beach destinations**
- » About **1 in 5** first-time visitors were **not considering any other destinations**



WHICH BEACH DESTINATIONS DID YOU CONSIDER? ¹

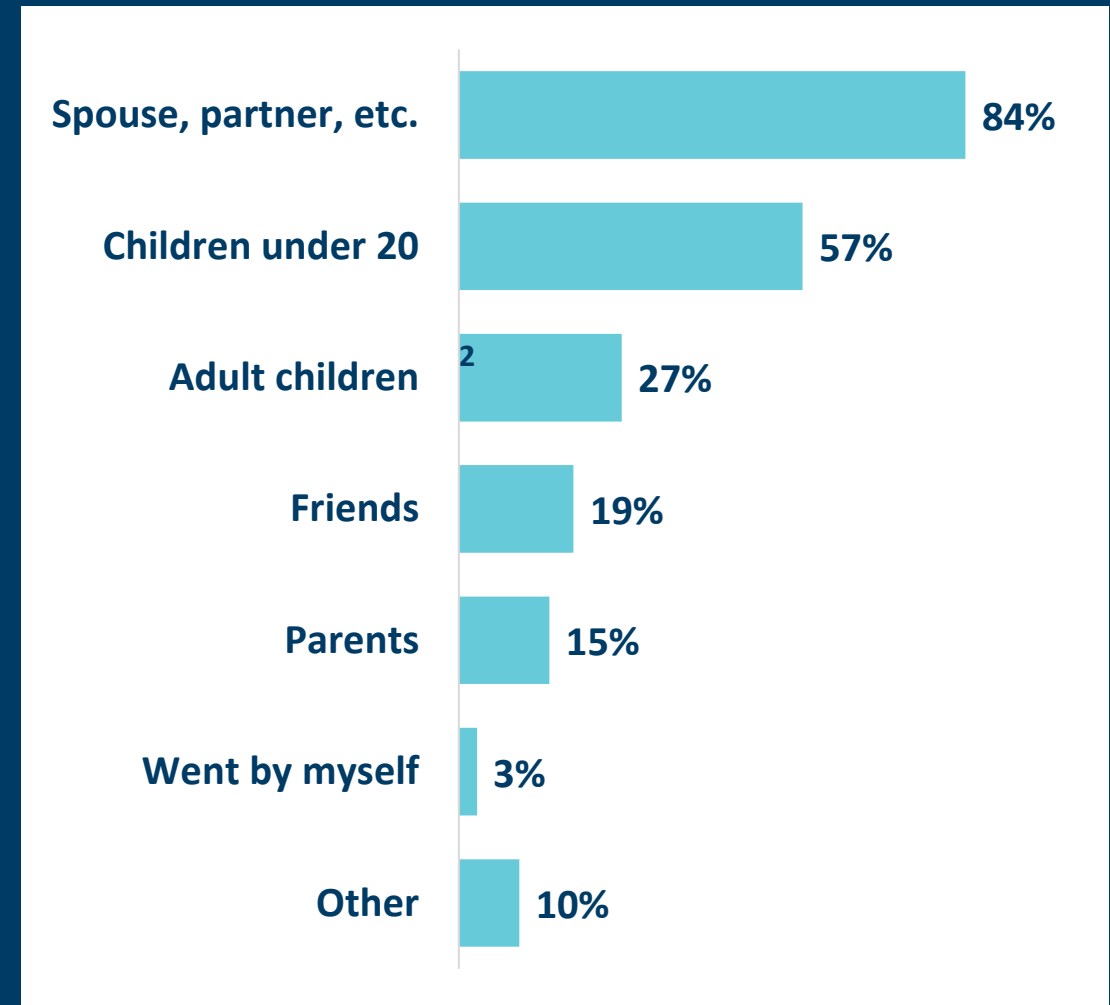
- » First-time visitors who were considering other beach destinations, primarily looked at **Destin**
- » Distantly following were **Panama City Beach, Pensacola Beach/Perdido Key, Orange Beach/Gulf Shores, and Hilton Head Island**



¹ Multiple responses accepted.

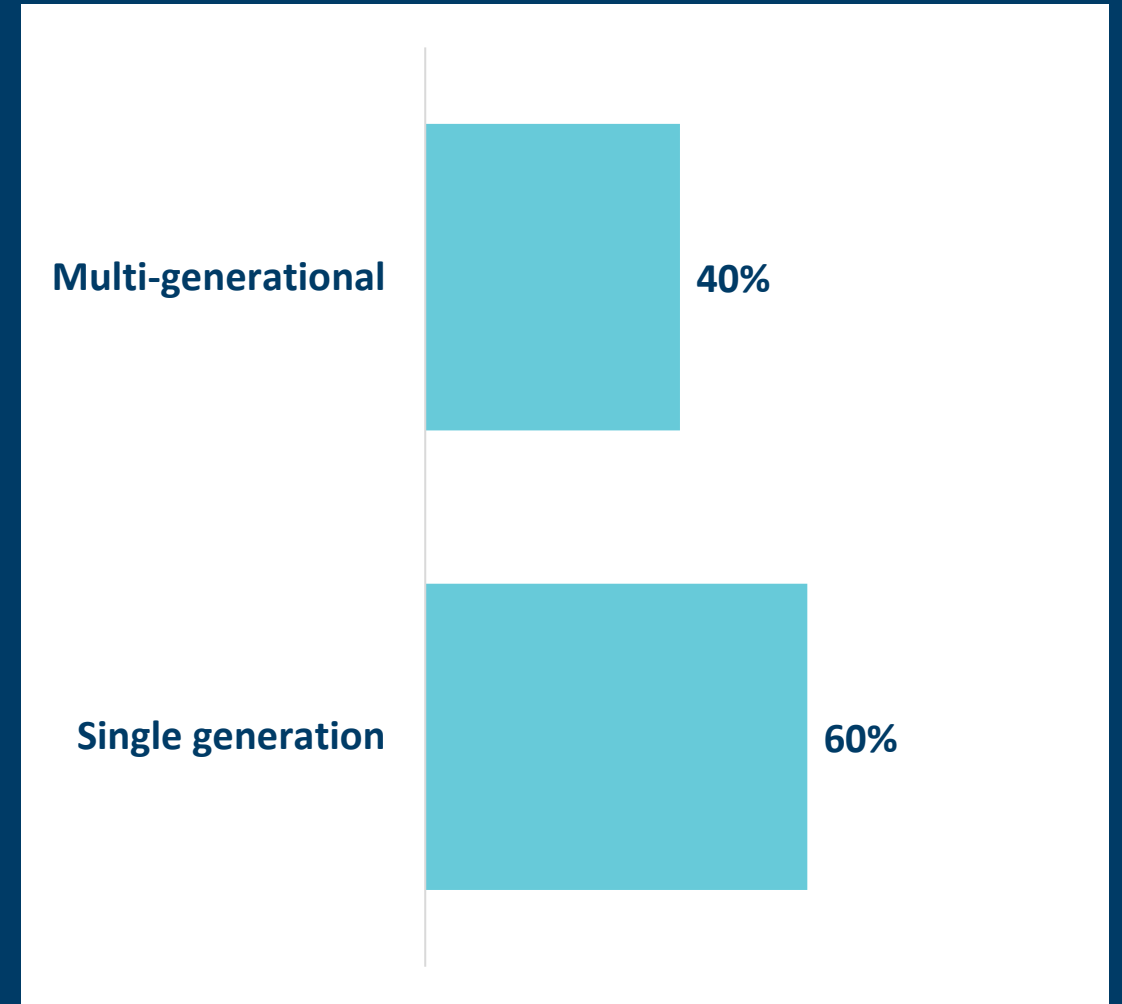
ON YOUR LAST TRIP TO SOUTH WALTON, WHO WAS IN YOUR TRAVEL PARTY?¹

- » Over **4 in 5** first-time visitors traveled with their **spouse or partner** on their last trip to South Walton
- » Nearly **3 in 5** vacationed with **children under 20** and about **3 in 10** vacationed with **adult children**



MULTI-GENERATION FAMILY VACATIONS¹

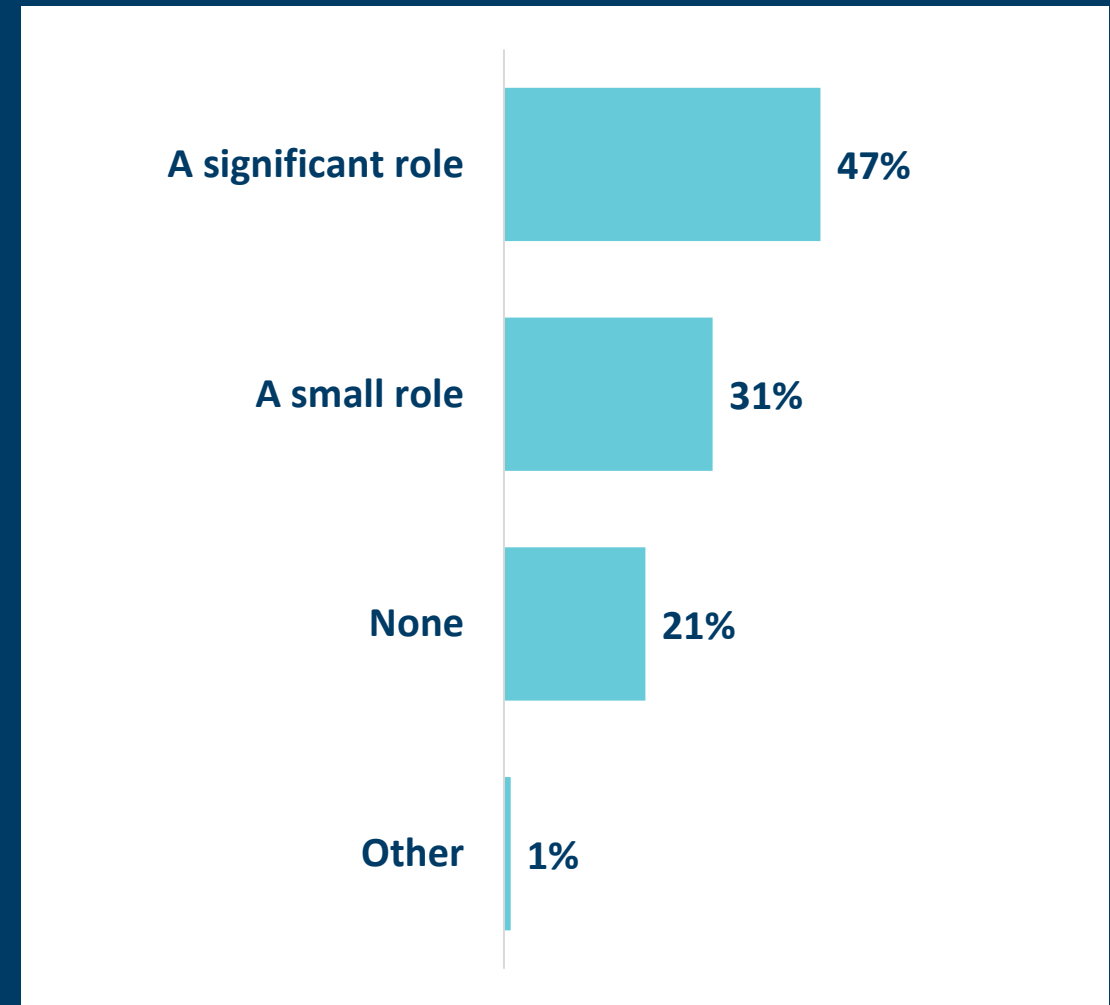
- » **2 in 5** first-time visitors took a **multi-generational** family vacation to South Walton



¹ Multi-generation includes those who traveled with either their parents, adult children, or children under 20 + their parents on their last vacation in South Walton.

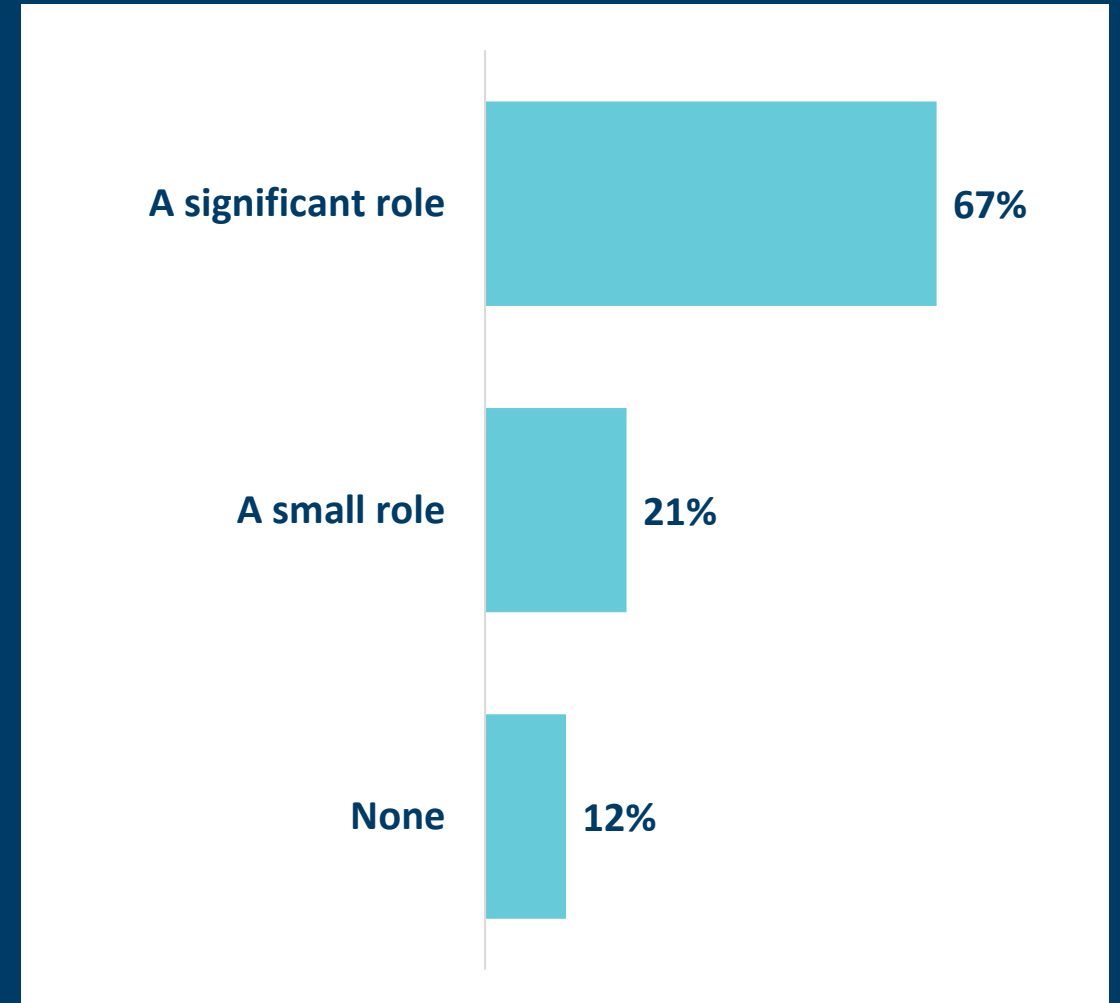
WHAT ROLE DID YOUR CHILDREN¹ PLAY IN CHOOSING SOUTH WALTON?

- » **57%** of first-time visitors took their children on their vacation to South Walton, of that about **half** recognized their children played a **significant role** in their vacation decision making



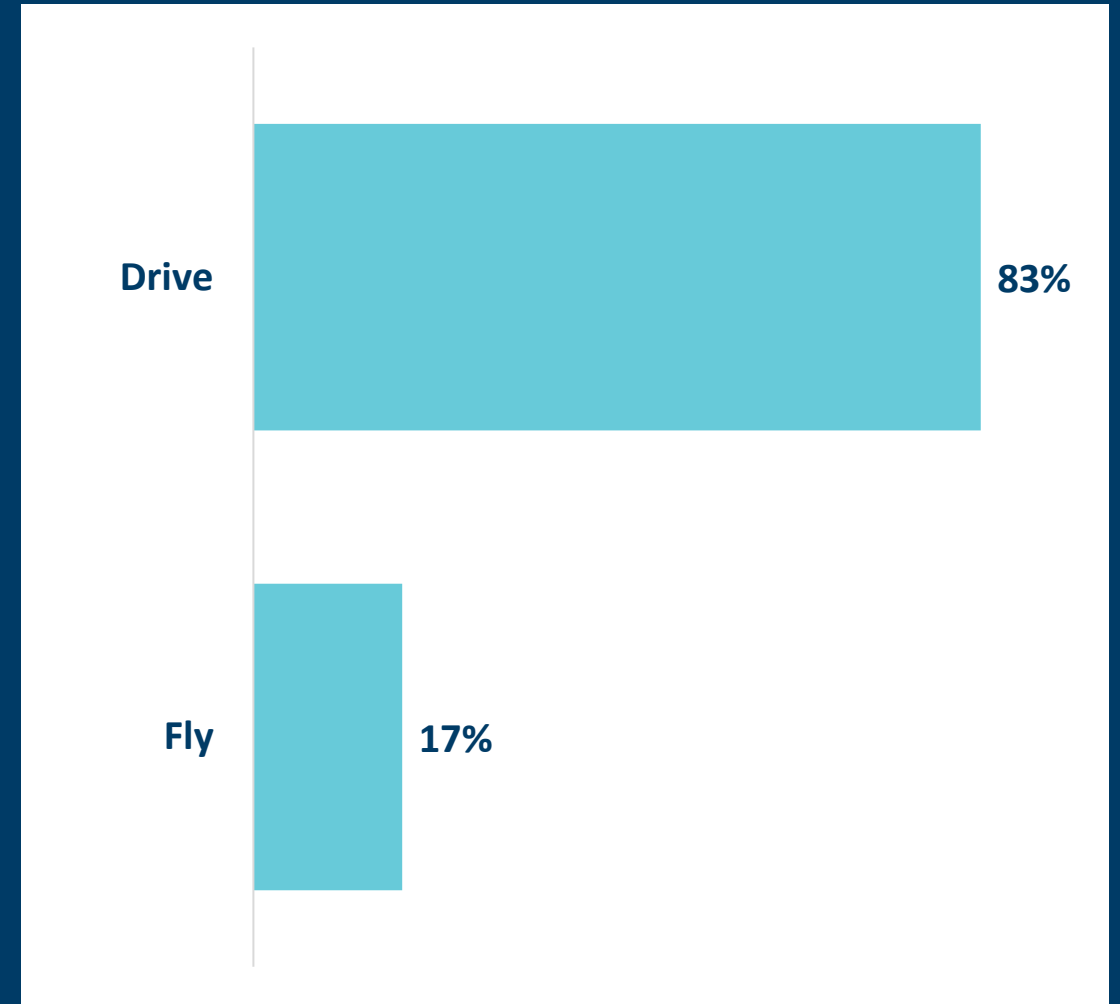
WHAT ROLE DID YOUR ADULT CHILDREN¹ PLAY IN CHOOSING SOUTH WALTON?

- » **27%** of first-time visitors took their adult children on their vacation to South Walton, of that **2 in 3** recognized their adult children played a **significant role** in their vacation decision making



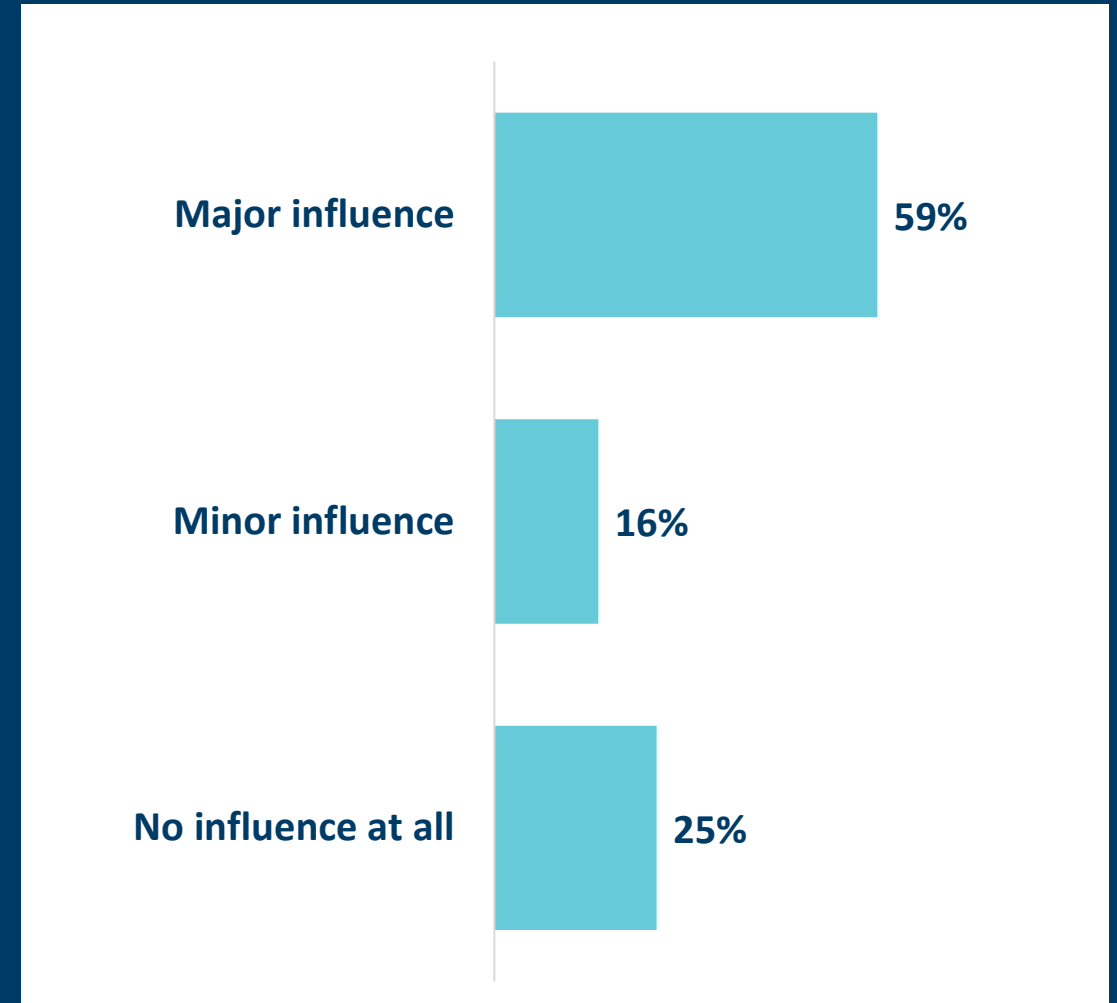
DID YOU DRIVE OR FLY TO THE SOUTH WALTON AREA?

- » Over **4 in 5** first-time visitors **drove** to South Walton



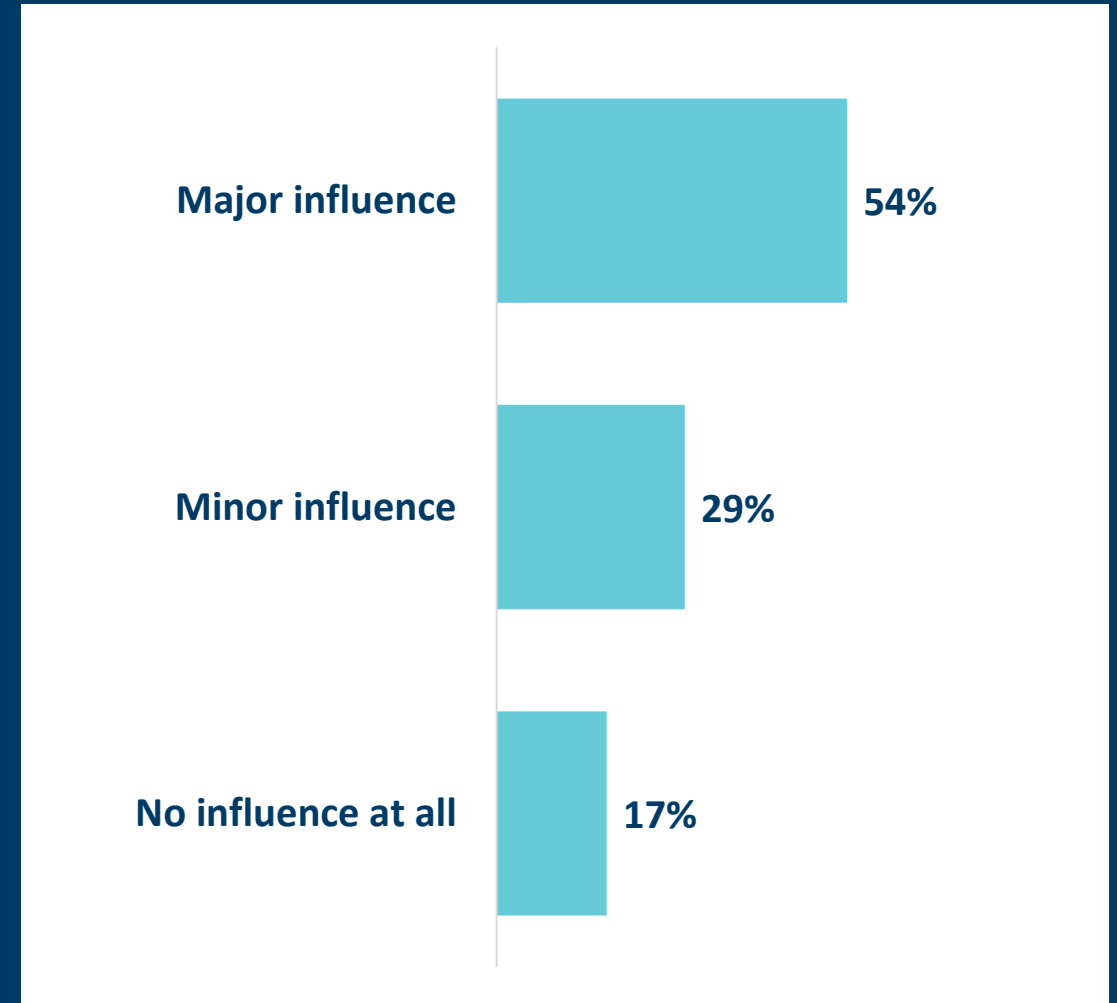
HOW MUCH DID THE MODE OF TRAVEL (PLANE VS CAR) INFLUENCE YOUR CHOICE TO VACATION IN SOUTH WALTON?

- » About **3 in 5** first-time visitors say their mode of travel had a **major influence** on their decision to vacation in South Walton
- » Yet, **1 in 4** said their mode of transportation had **no influence at all**



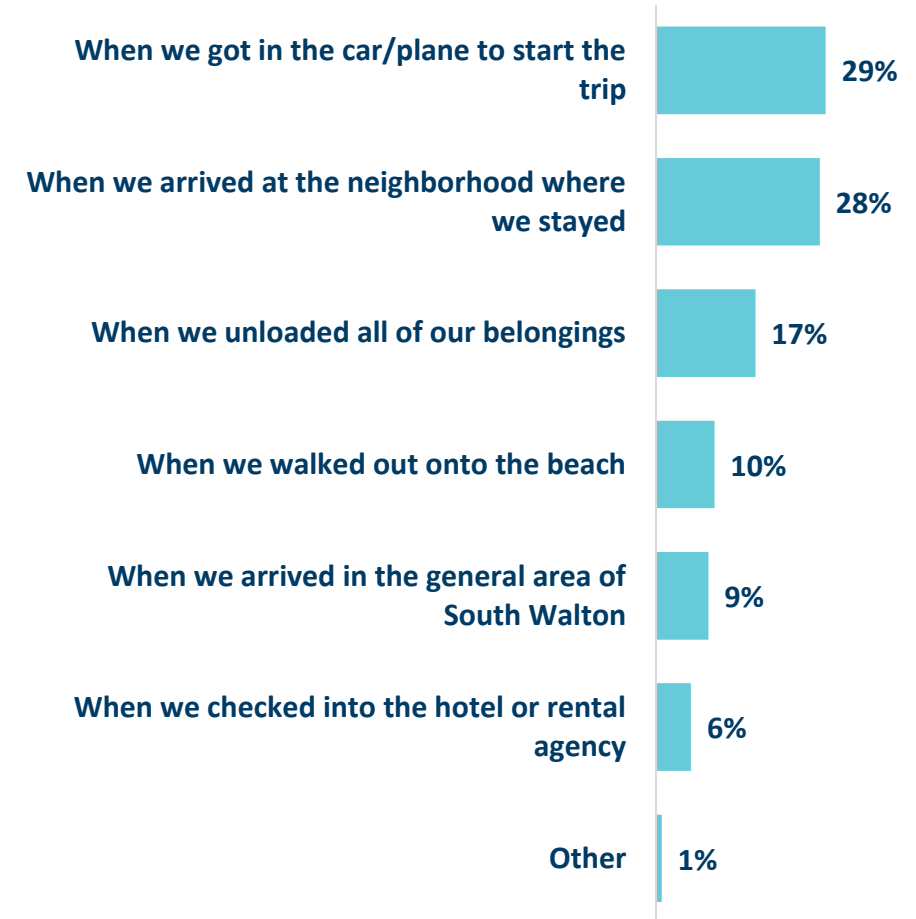
HOW MUCH DID THE DISTANCE/TRAVEL TIME FROM YOUR DESTINATION TO SOUTH WALTON INFLUENCE YOUR CHOICE TO VACATION IN SOUTH WALTON?

- » Over **half** of first-time visitors say the distance/travel time to South Walton had a **major influence** on their decision to vacation there



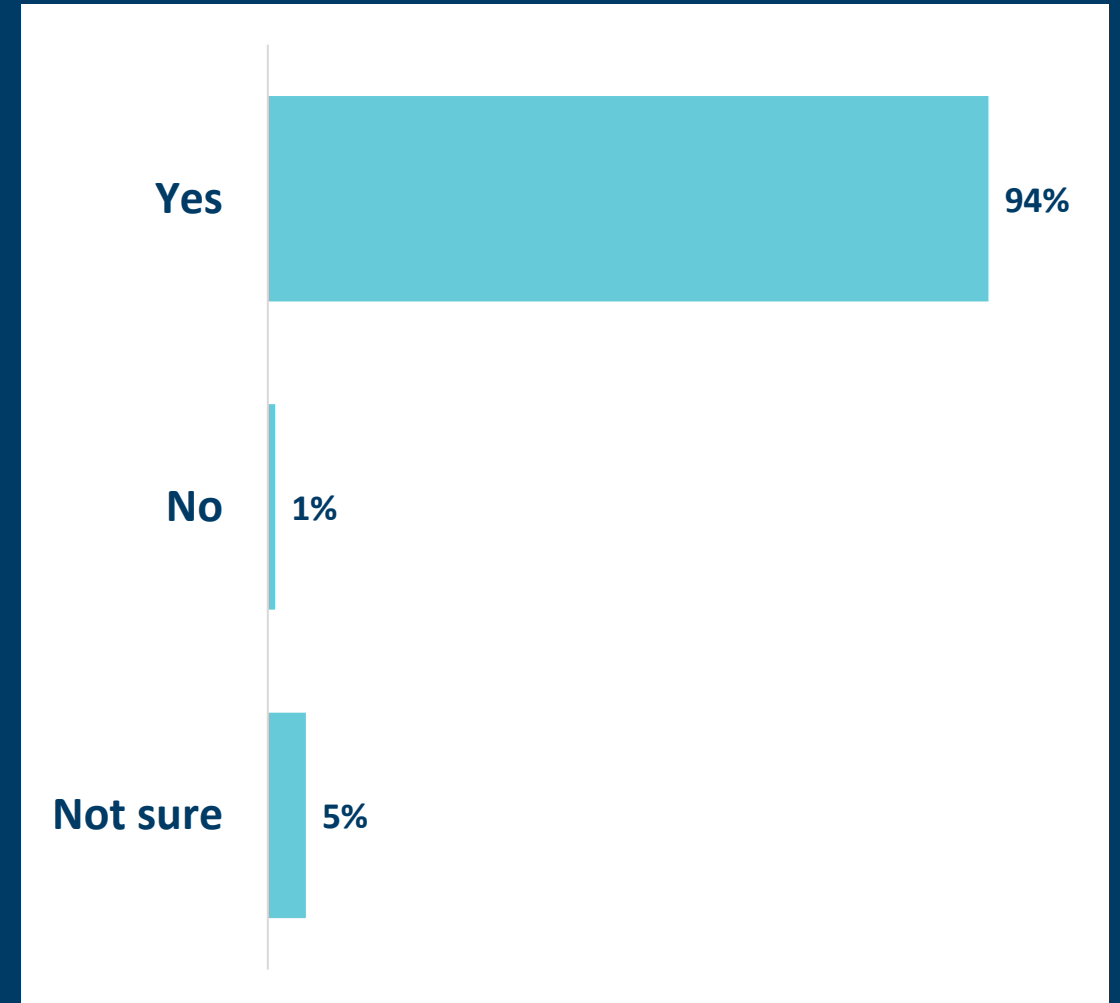
WHEN DID YOUR SOUTH WALTON VACATION REALLY BEGIN

- » For about **3 in 10** first-time visitors, their South Walton vacation really began:
 - » When they **got in the car/plane** to start the trip
 - » Or when they **arrived at their South Walton neighborhood**



DO YOU SEE YOU (AND YOUR FAMILY) RETURNING TO SW?¹

- » **94%** of first-time visitor see themselves returning to South Walton in the future

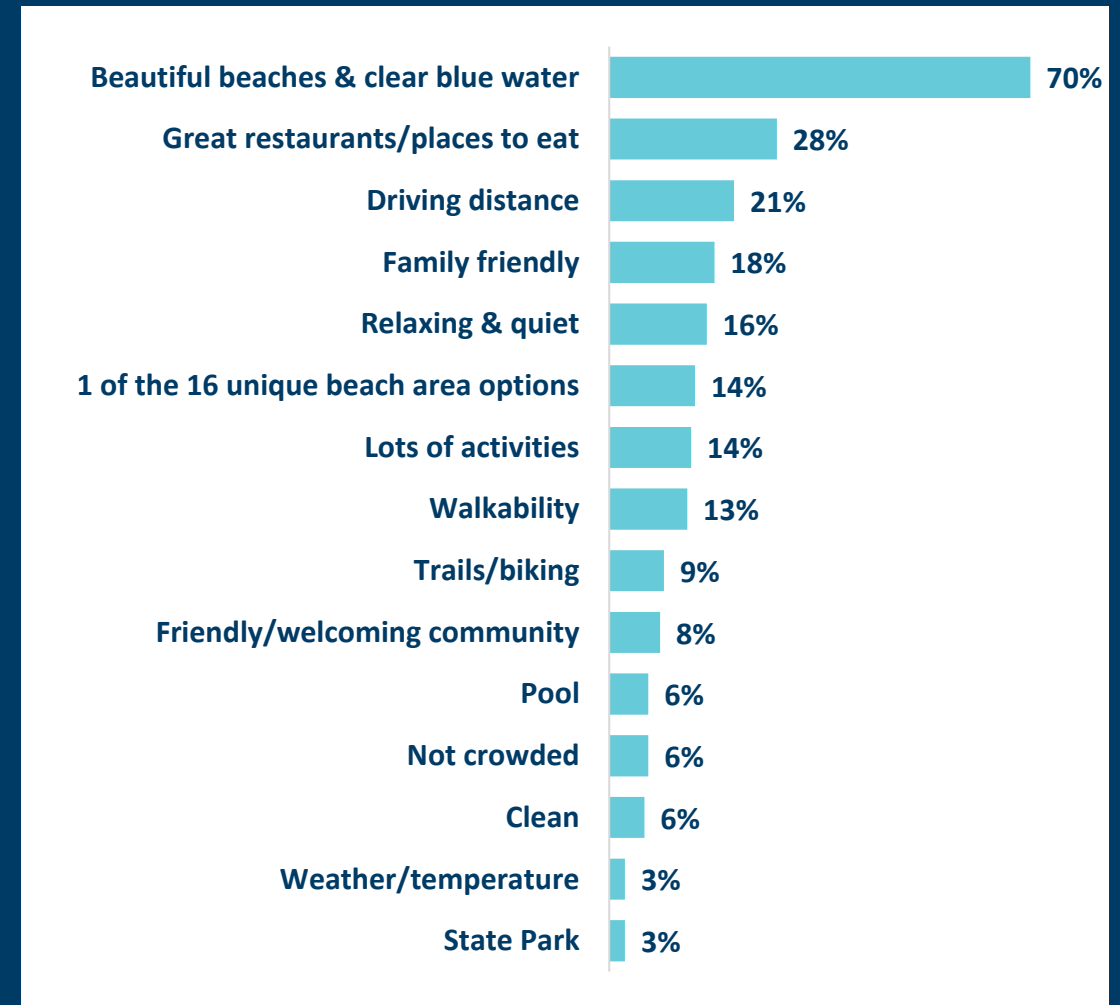


¹ Of the 6% of first-time visitors who do not see themselves returning or were unsure, reasons listed most often were:

1. Prefer destinations with less crowds and 2. Wanting to explore other destinations.

WHY DO YOU SEE YOU AND YOUR FAMILY RETURNING TO SOUTH WALTON?¹

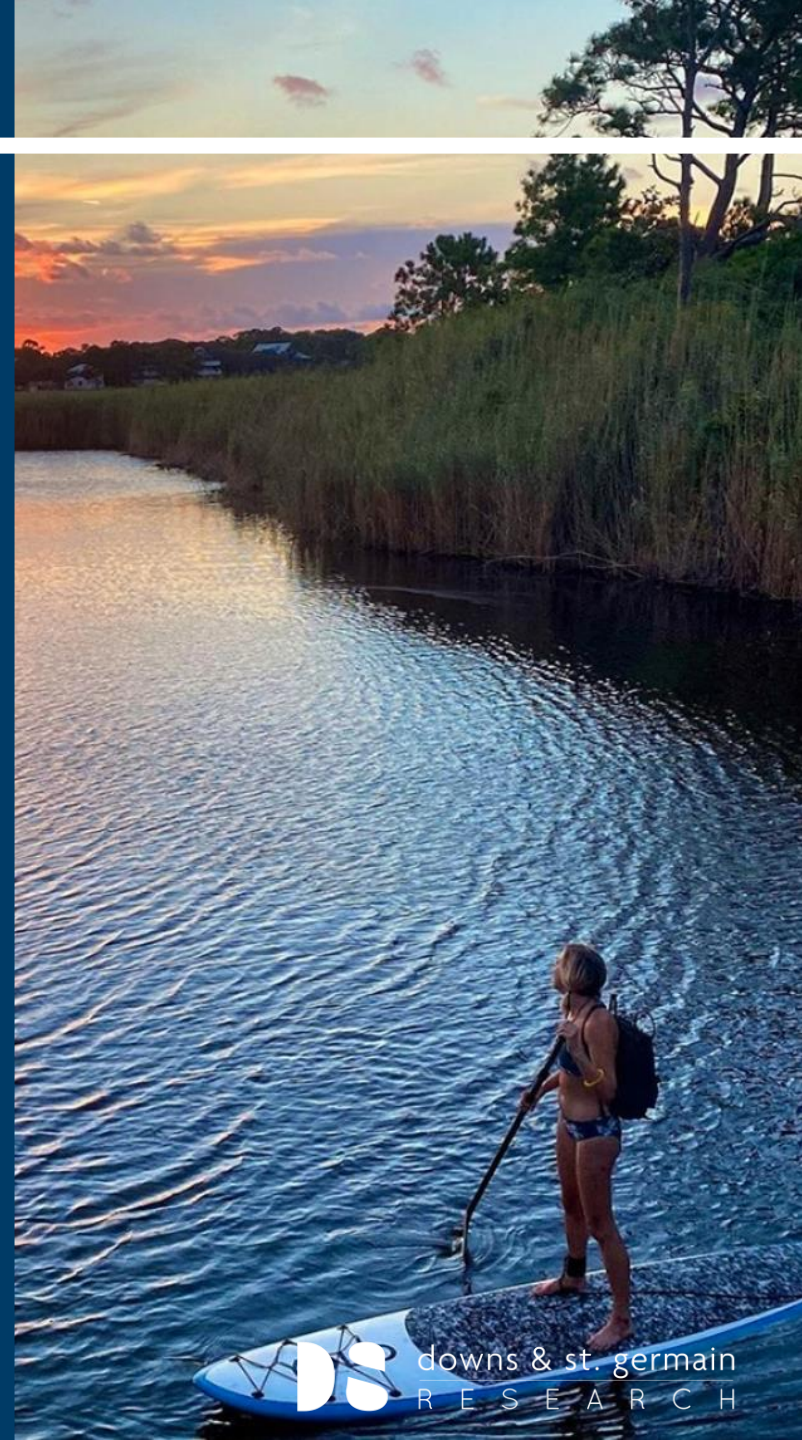
- » **7 in 10** first-time visitors who see their family returning to South Walton mention the **beautiful beaches & clear blue water**
- » Nearly **3 in 10** visitors enjoyed the **variety of great restaurants**
- » About **1 in 5** visitors mention the **convenient driving distance and the family-friendly atmosphere**



WHY WILL YOU RETURN TO SOUTH WALTON?

“South Walton fit many/all of the key criteria our family was looking for when planning the vacation. These key criteria included outdoor space, beach, drive time, quality of accommodations, highly rated restaurants, unique accommodations allowing for multi-generational bonding, quality activities for kids, safe environment, among others.”

“We loved the beautiful beaches that we cannot find in Texas. I love how Seaside is everything you need within walking distance. We enjoyed the amenities in town. It was the perfect balance between plenty of things to do and still having time to relax and do nothing, without feeling like you're missing out. The architecture is a huge draw for me as well.”

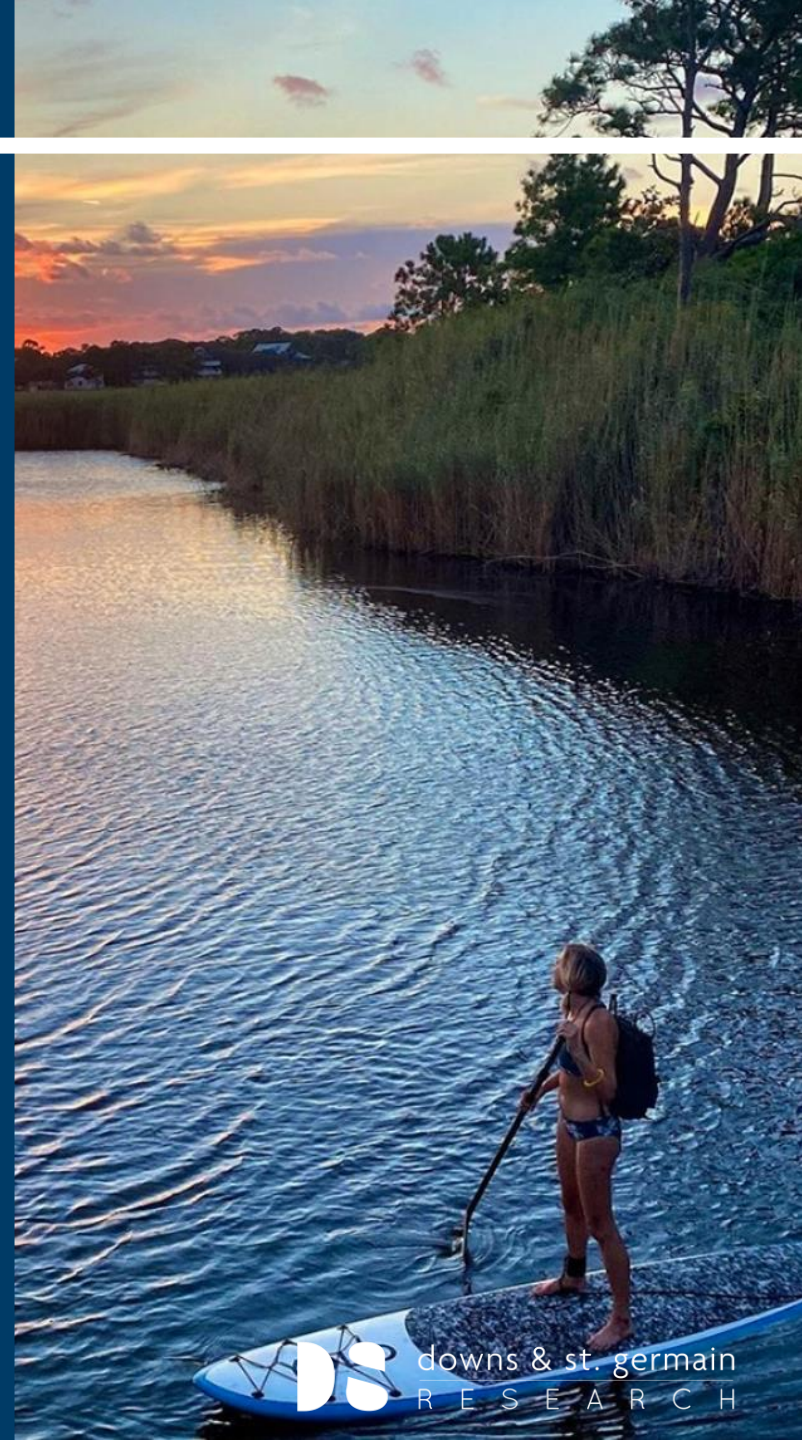


WHY WILL YOU RETURN TO SOUTH WALTON?

“We loved the area! It was clean, beautiful, and friendly. The house we rented was perfect for our large extended family. We had a pool and we could walk to beach in 5 minutes. Good restaurants and lots to do.”

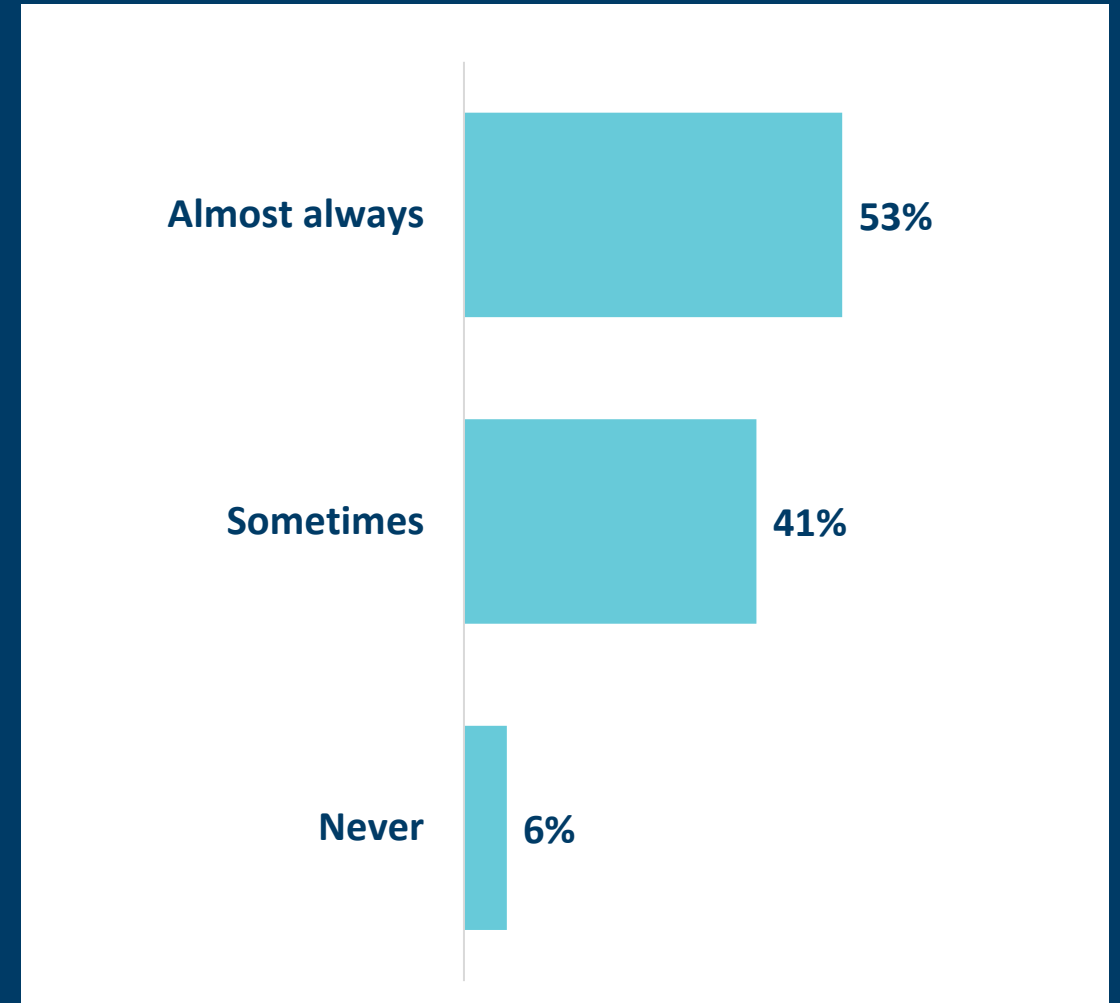
“We love the powder-sand beaches, the emerald green water and we've found the perfect house for our entire family right across from the beach!”

“We love South Walton, specifically Seaside/WaterColor and we plan to make it our summer vacation destination every other summer (alternating with Disney)! The whole area is beautiful, the water and beach are nice, lots of great restaurants and shops, great accommodations and very easy to get around!”



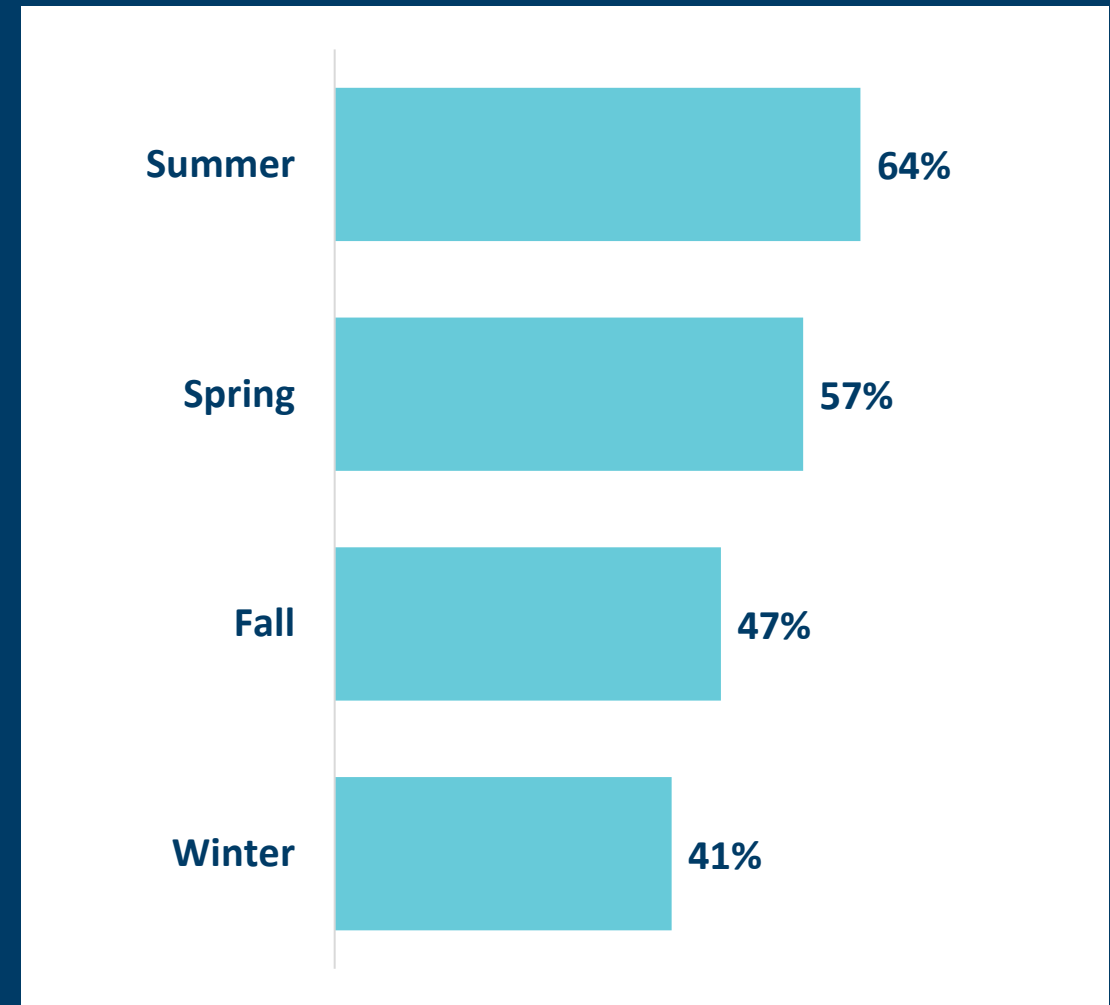
DOES THE SEASON (SUMMER, WINTER, SPRING, FALL) DETERMINE WHAT TYPE OF TRIP YOU TAKE?

- » Over **half** of first-time visitors say the season **almost always** determines what type of trip they take



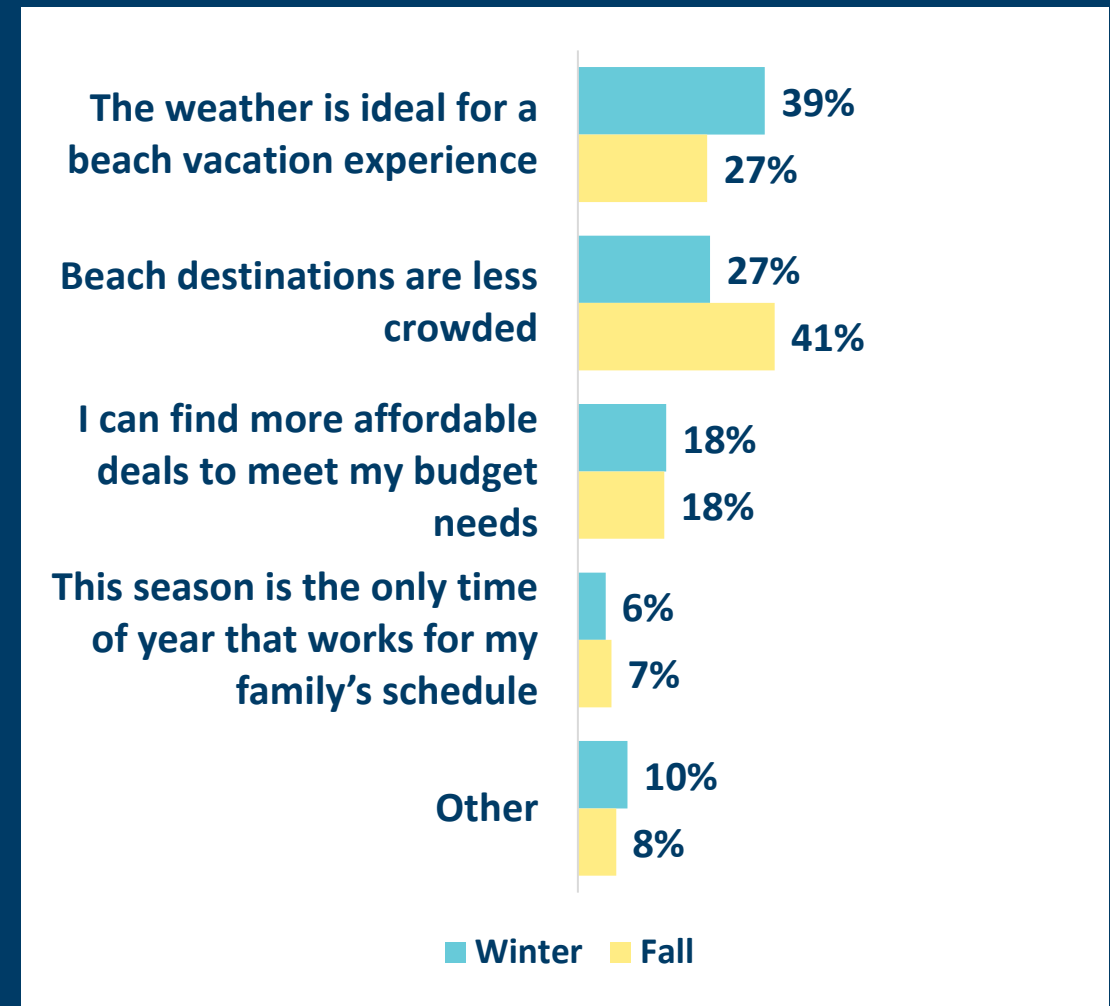
WHAT SEASONS ARE BEACH VACATIONS FOR YOU (AND YOUR FAMILY)?¹

- » Unsurprisingly, nearly **2 in 3** first-time visitors say **Summer** is their beach vacation season and nearly **3 in 5** list **Spring**
- » Yet, almost **half** also mention **Fall** and **2 in 5** list **Winter** as their beach vacations seasons



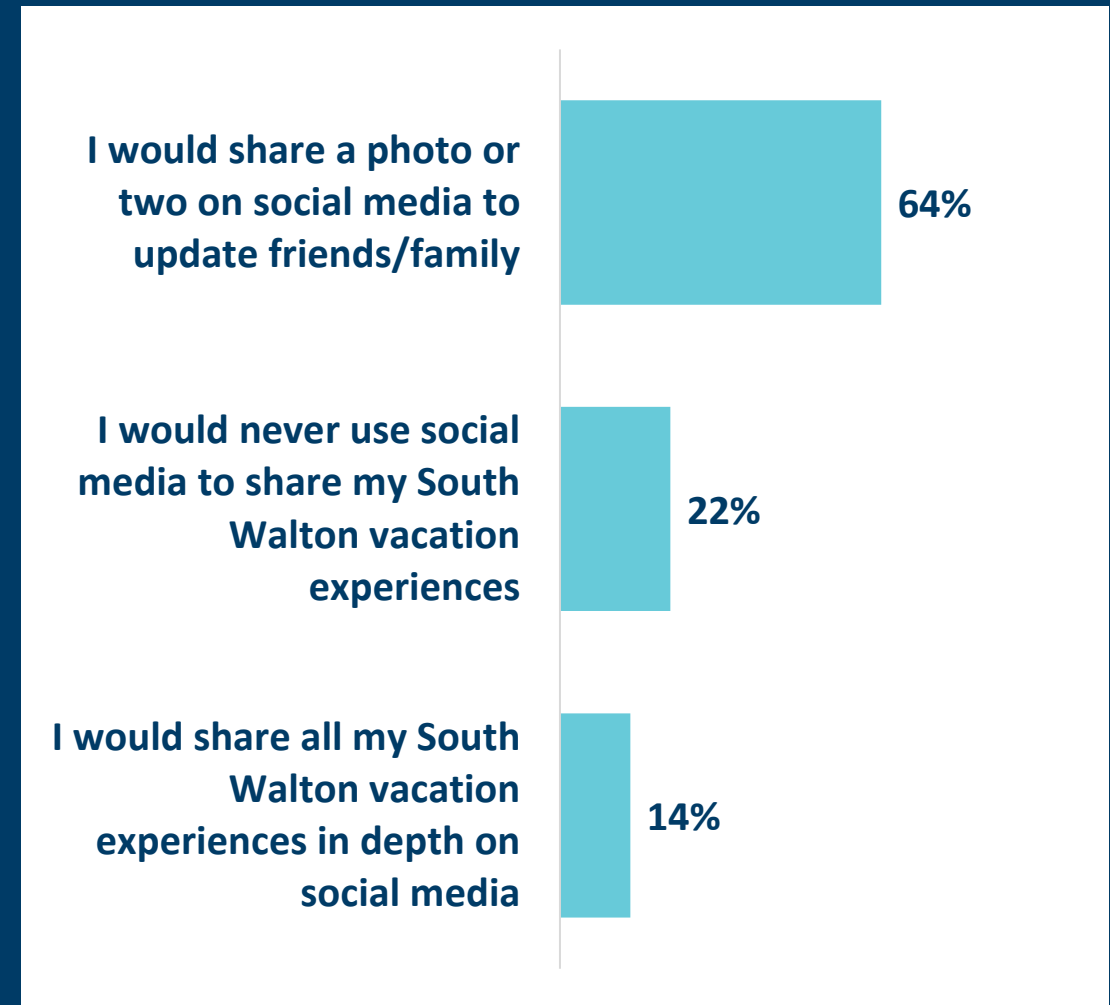
WHAT IS THE MAIN REASON YOU (AND YOUR FAMILY) CHOOSE TO TAKE BEACH VACATIONS IN WINTER OR FALL?

- » For first-time visitors who mention off-peak seasons like Winter and Fall as their beach vacation seasons:
 - » About **2 in 5** say the **weather is ideal in Winter**
 - » Over **2 in 5** say beach destinations are **less crowded in Fall**
 - » Nearly **1 in 5** say they can **find more affordable deals in both Winter and Fall**



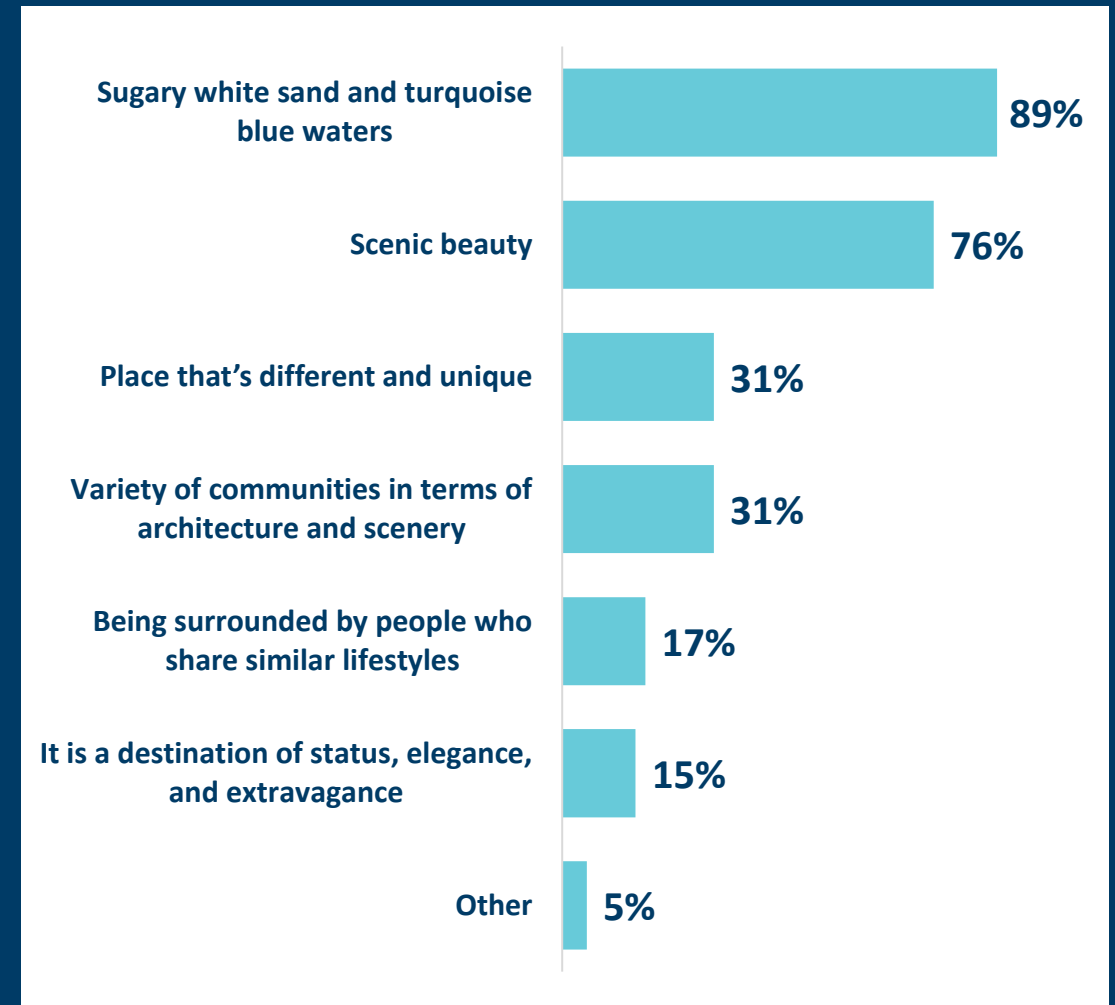
TO WHAT EXTENT WOULD YOU SHARE YOUR SOUTH WALTON VACATION EXPERIENCES ON SOCIAL MEDIA?

- » Nearly **2 in 3** first-time visitors are moderate social media users and **would share a photo or two on social media to updated friends/family**
- » Over **1 in 5** would **never use social media to share their South Walton experience**



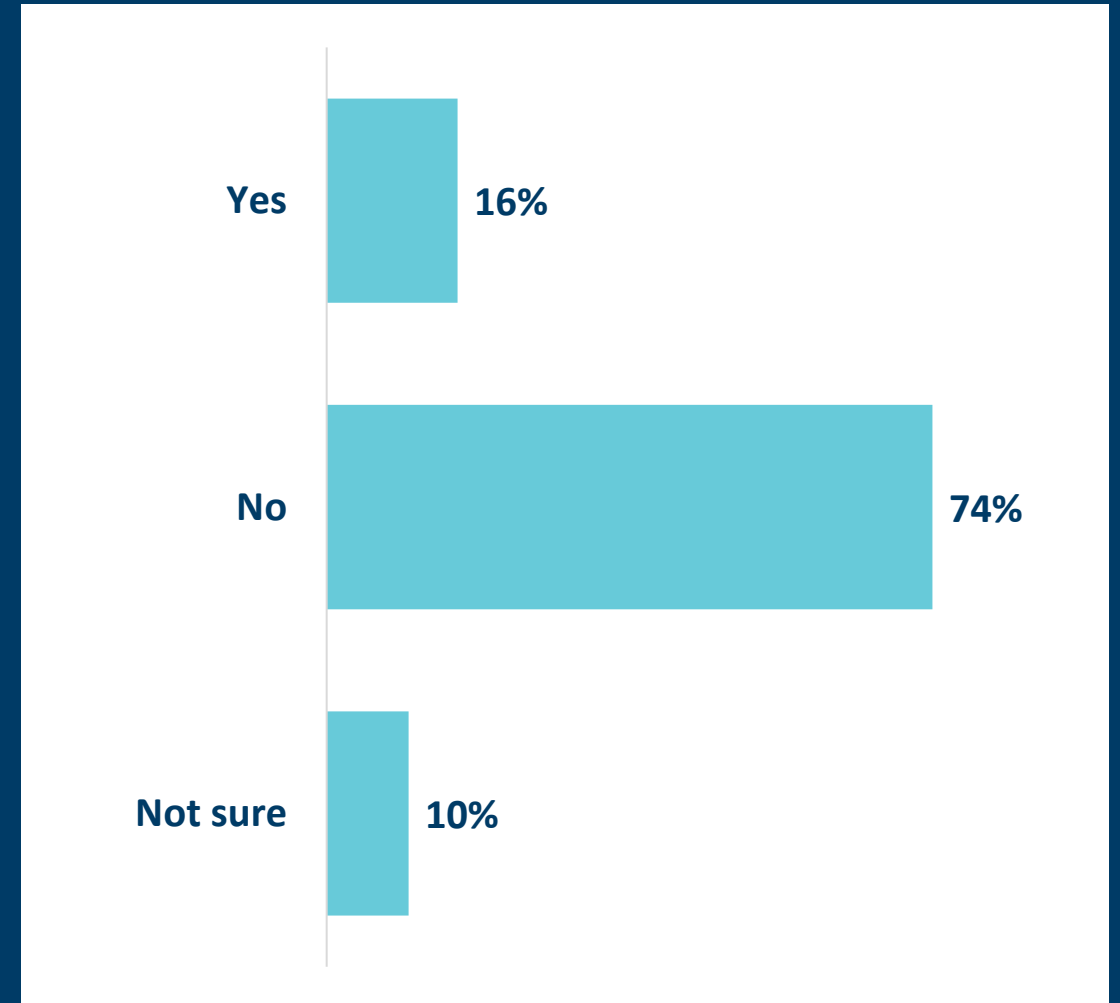
WHAT IS IT ABOUT A SOUTH WALTON VACATION THAT MAKES IT WORTH SHARING ON SOCIAL MEDIA?¹

- » First-time visitors who would share their South Walton vacation on social media overwhelmingly say it's the **sugary white sand & turquoise blue water and scenic beauty** that make it worth sharing



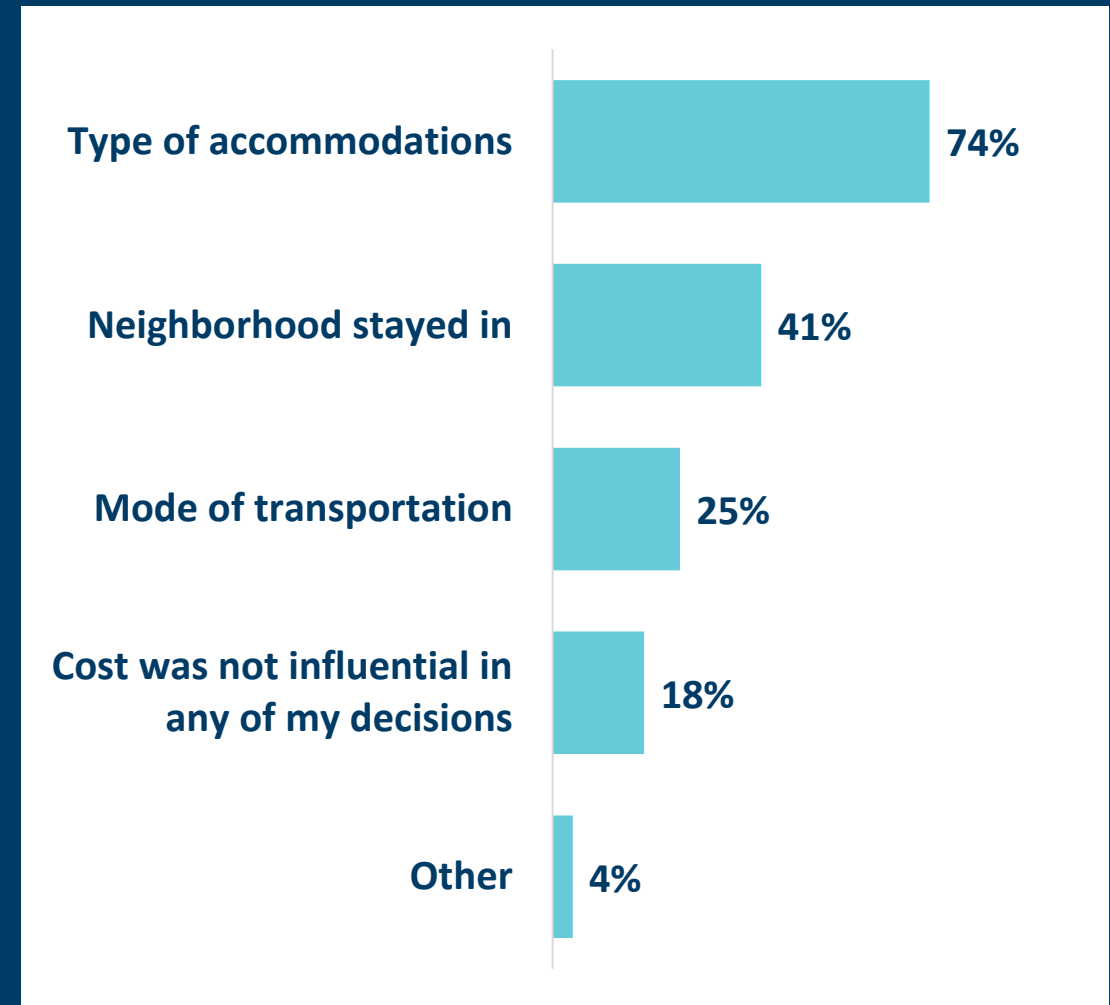
THINK BACK TO BEFORE YOU WENT TO SOUTH WALTON THE FIRST TIME, HAD YOU PREVIOUSLY CONSIDERED GOING, BUT DECIDED AGAINST IT BECAUSE OF THE COST OF A VACATION IN SOUTH WALTON?

- » When visitors previously considered vacationing in South Walton but decided against it, cost was **not the main concern** for **5 in 6** first-time visitors



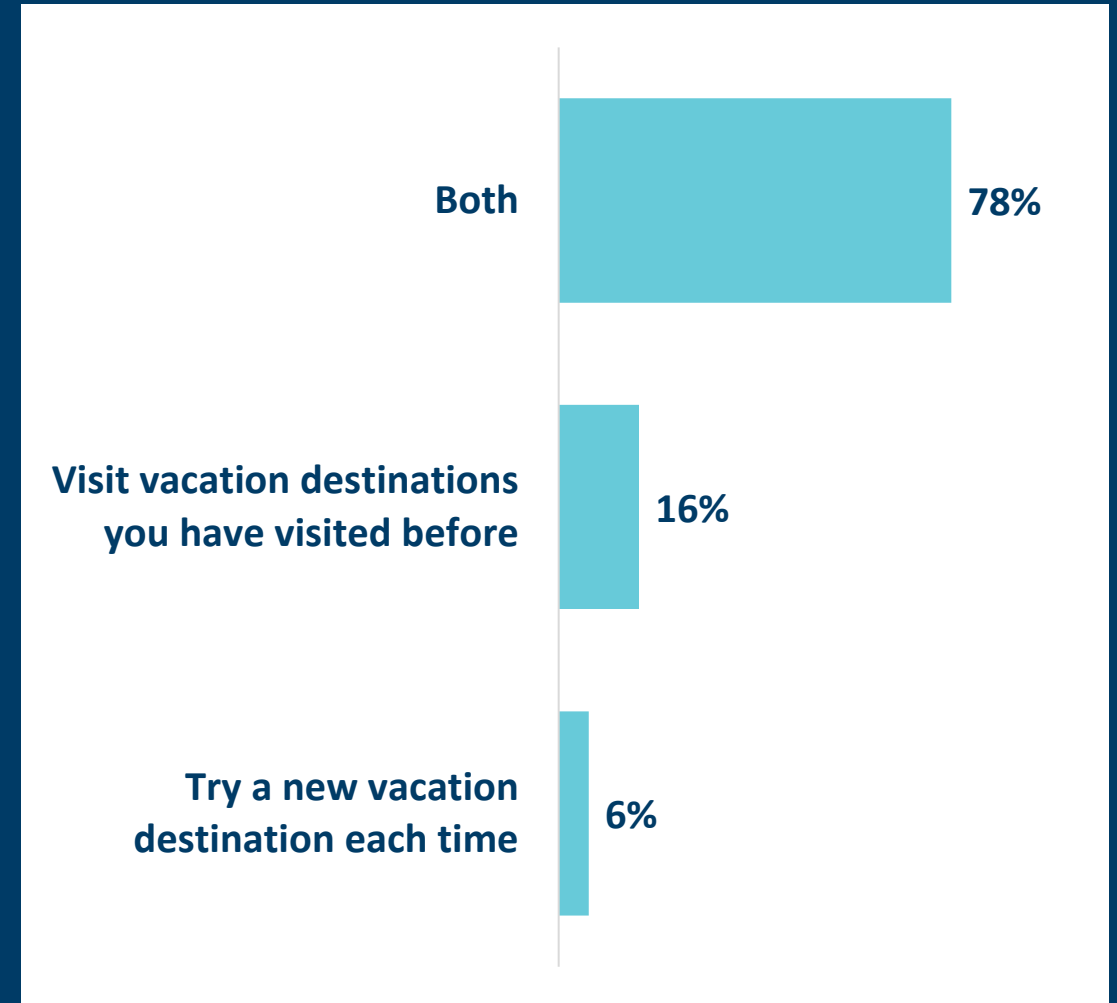
WHILE PLANNING YOUR VACATION TO SOUTH WALTON, WAS COST INFLUENTIAL IN YOUR DECISION IN ANY OF THE FOLLOWING FACTORS?¹

- » While overall vacation cost was not a top concern, cost did influence the **type of accommodations** chosen for **3 in 4** first-time visitors
- » **2 in 5** visitors says cost was influential in **determining what neighborhood** they stayed in



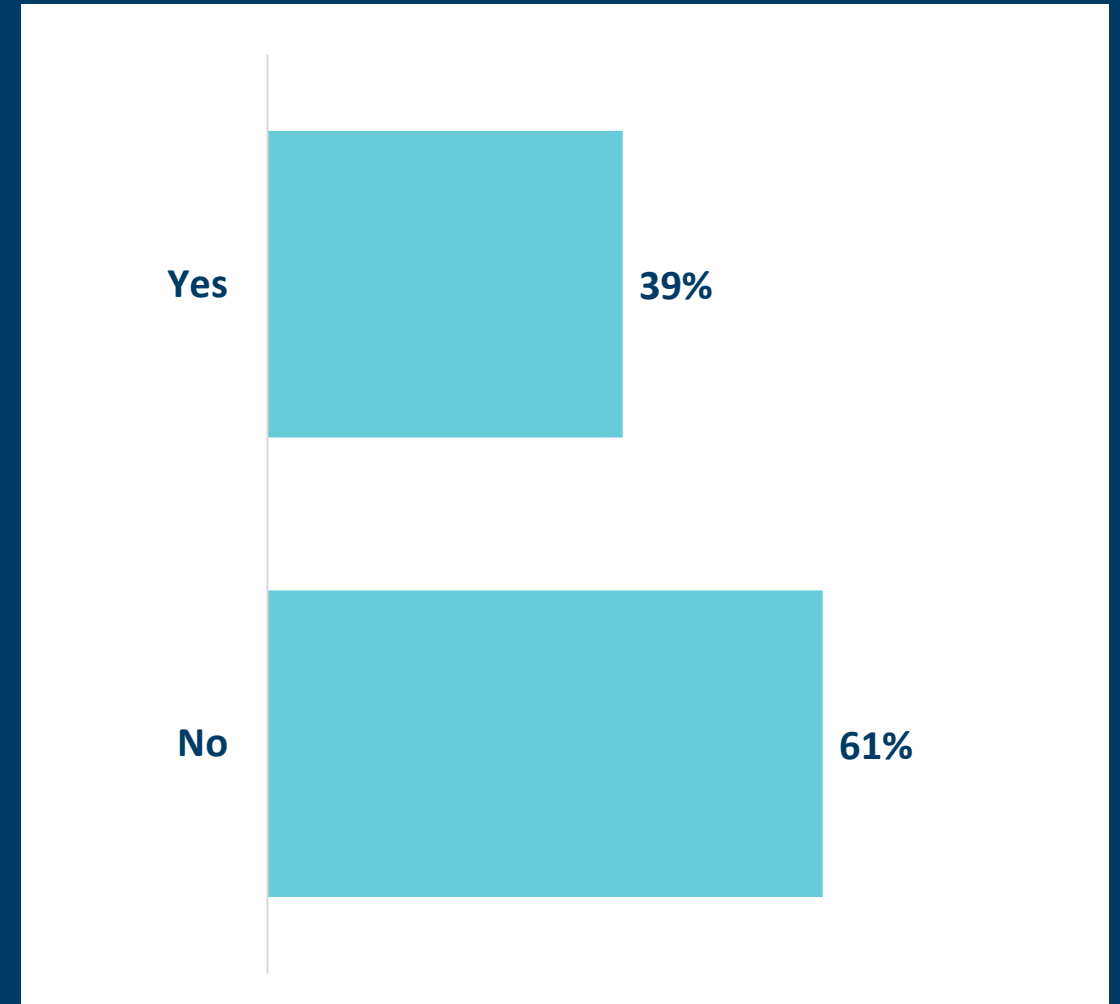
WHEN YOU CONSIDER A VACATION DESTINATION, DO YOU PREFER TO:

- » About **4 in 5** first-time visitors say they prefer to **visit vacation destinations they have visited before AND try new vacation destinations**



DURING COVID, DID YOU CANCEL AN INTERNATIONAL VACATION?

- » **2 in 5** first-time visitors had to cancel an international vacation due to COVID-19



DID YOU REPLACE THIS INTERNATIONAL VACATION WITH¹

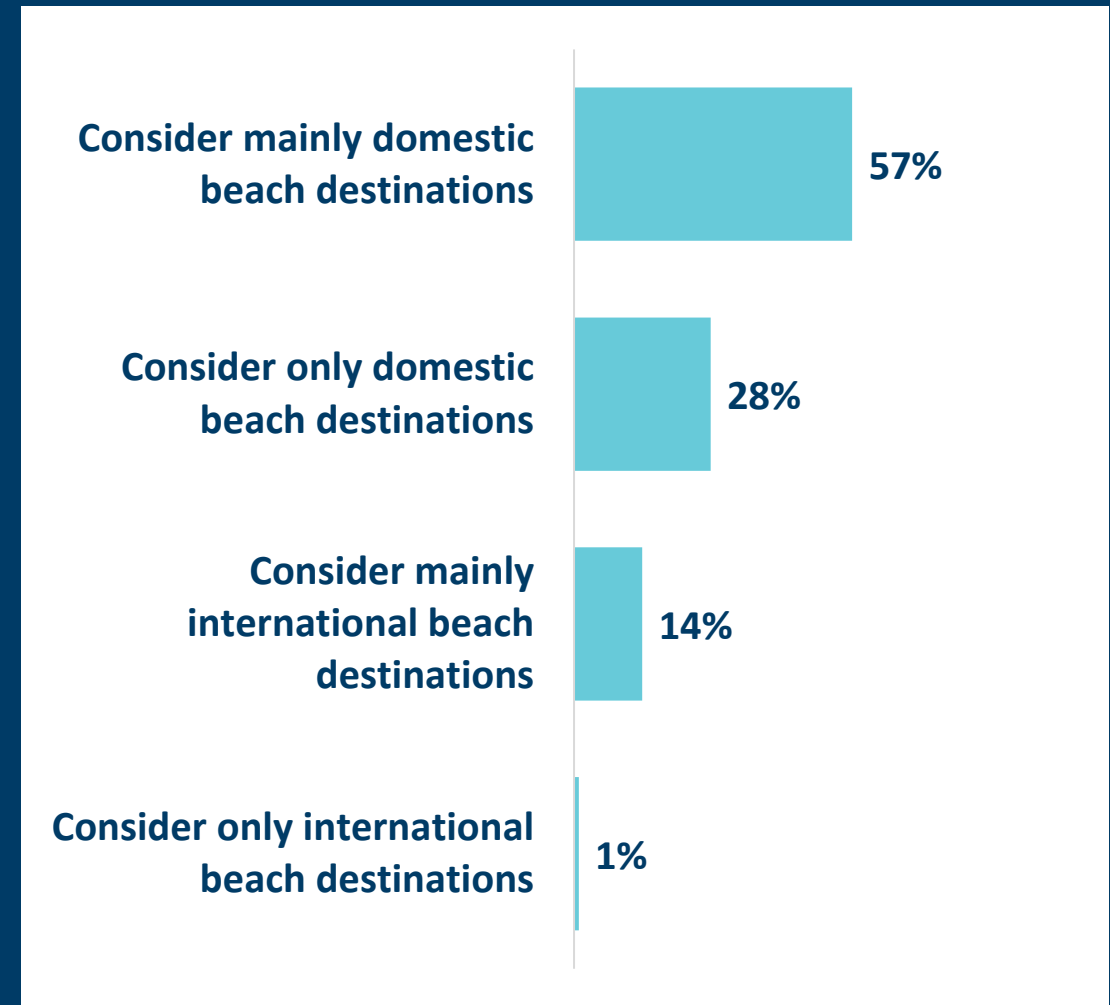
» **Half** of first-time visitors who had to cancel an international vacation, replaced it with a vacation to South Walton



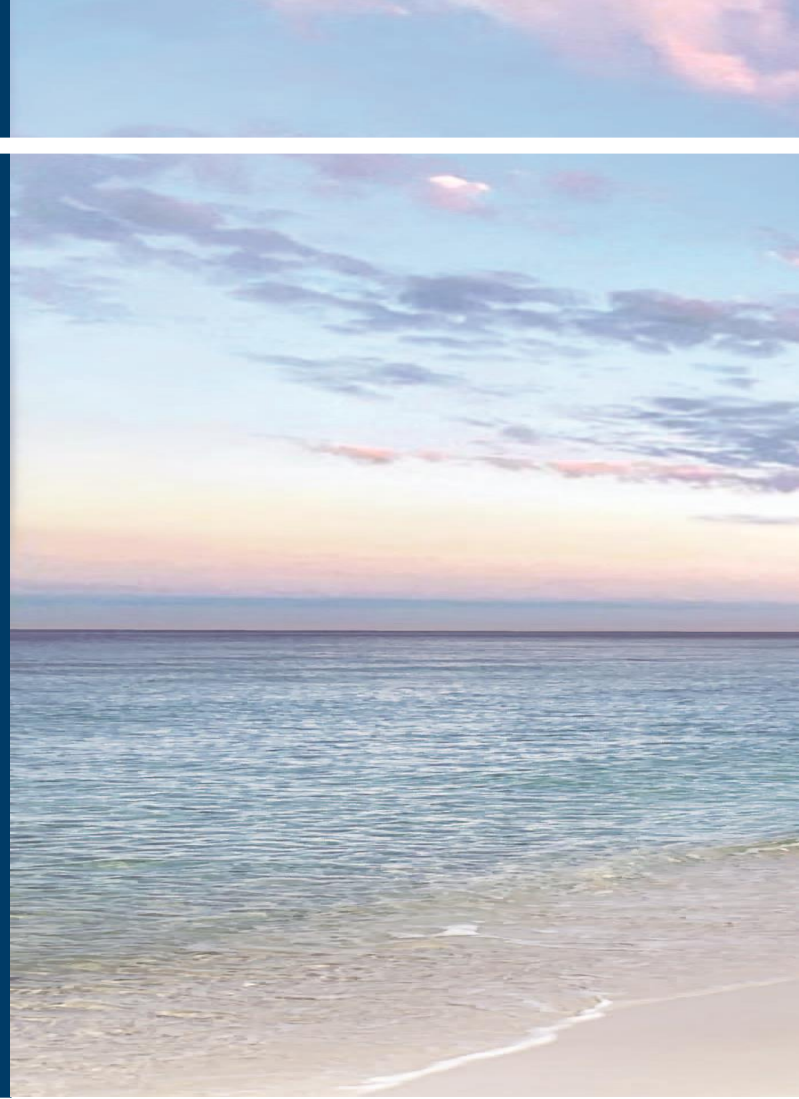
¹ Multiple responses accepted.

DO YOU CONSIDER ONLY DOMESTIC VACATION DESTINATIONS WHEN THINKING OF A BEACH VACATION OR DO YOU ALSO CONSIDER INTERNATIONAL BEACH DESTINATIONS?

- » When considering a beach vacation, over 4 in 5 first-time visitors consider mainly or only domestic beach destinations

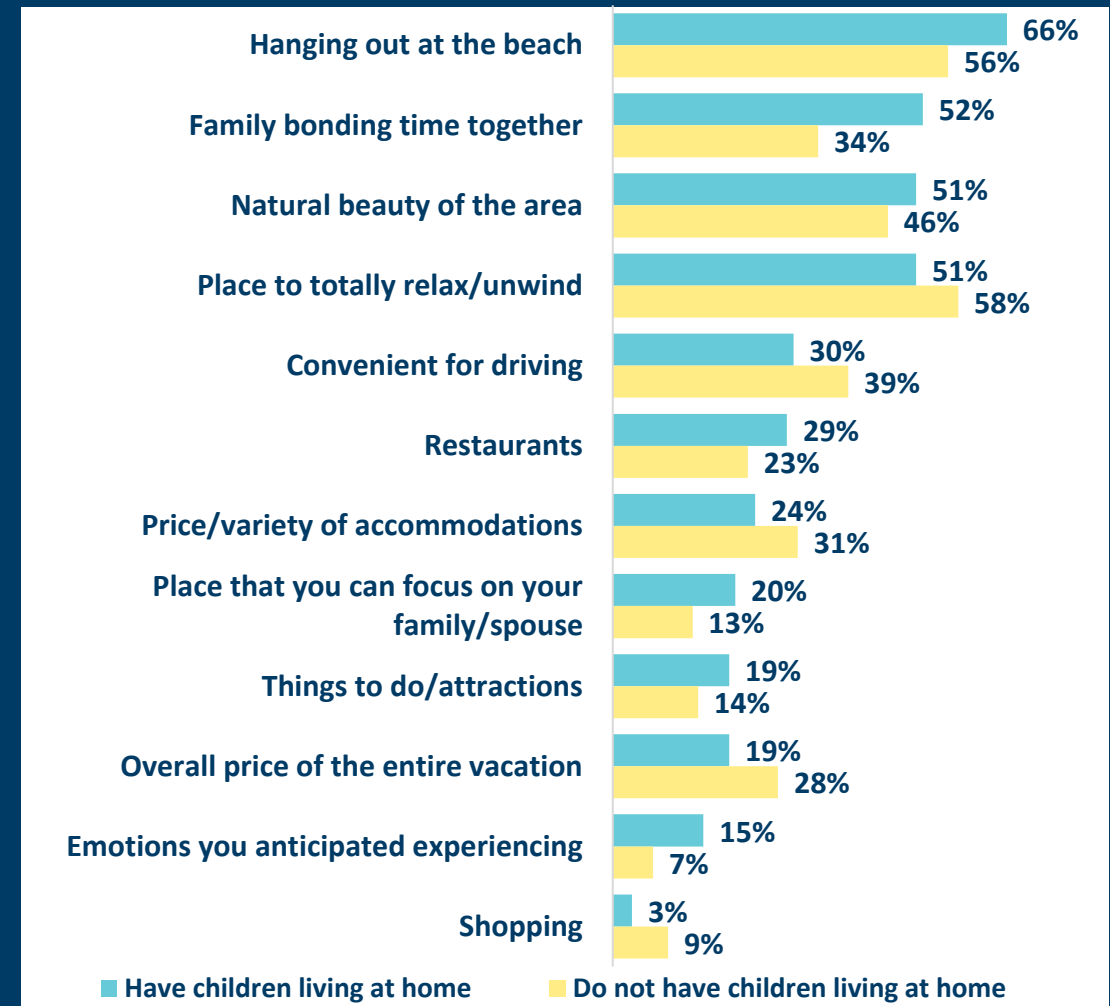


FIRST-TIME VISITORS WITH AND WITHOUT CHILDREN



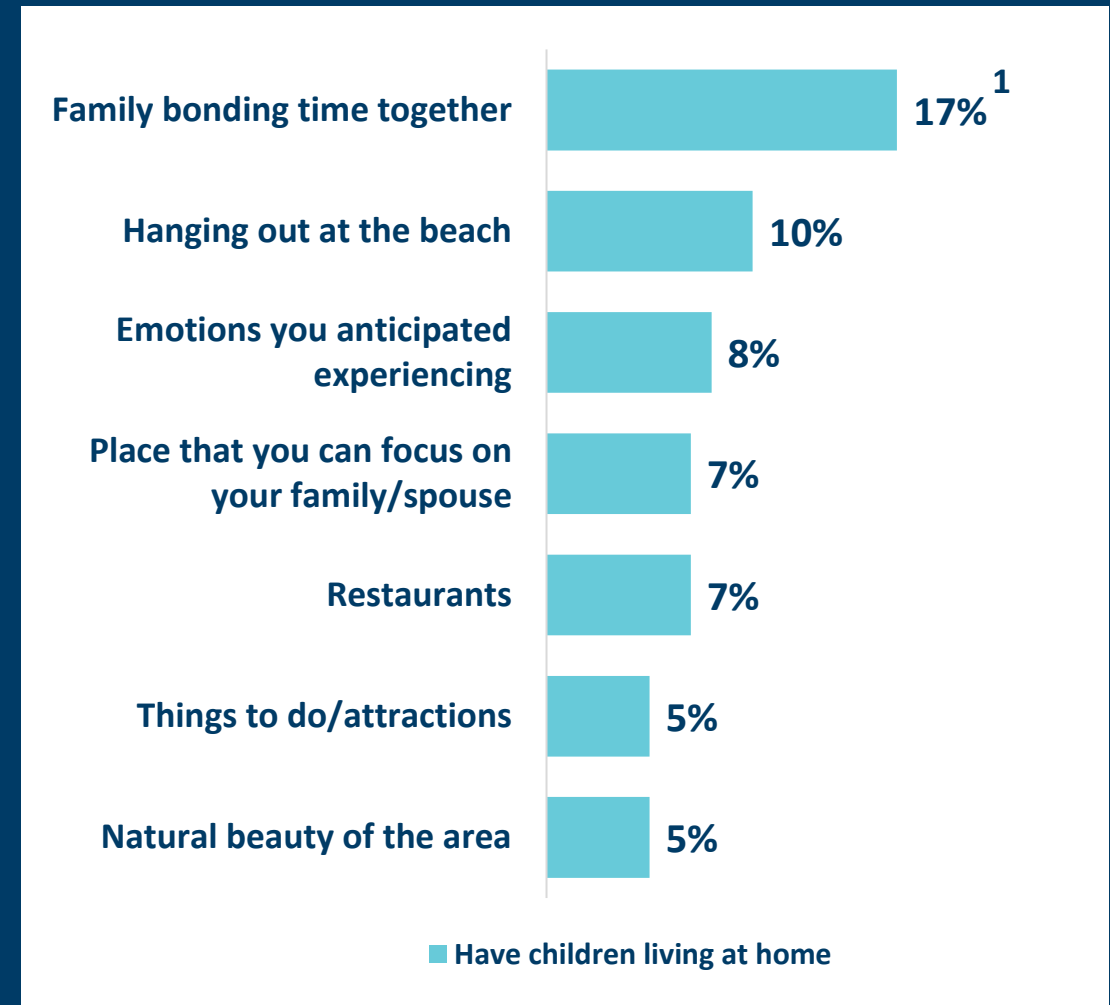
IMPORTANT VACATION DECISION FACTORS¹: VISITORS WITH CHILDREN LIVING AT HOME VS. VISITORS WITHOUT CHILDREN LIVING AT HOME

- » First-time visitors with children living at home placed more importance on **family bonding time together** and **hanging out at the beach**
- » While first-time visitors without children living at home placed more importance on **convenience for driving** and **overall price of the entire vacation**



IMPORTANT VACATION DECISION FACTORS: VISITORS WITH CHILDREN LIVING AT HOME VS. VISITORS WITHOUT CHILDREN LIVING AT HOME¹

- » First-time visitors with children living at home are **17% more likely** to view **family bonding time together** as an important vacation decision factor
- » They also place more importance on **hanging out at the beach and emotions they anticipate experiencing**



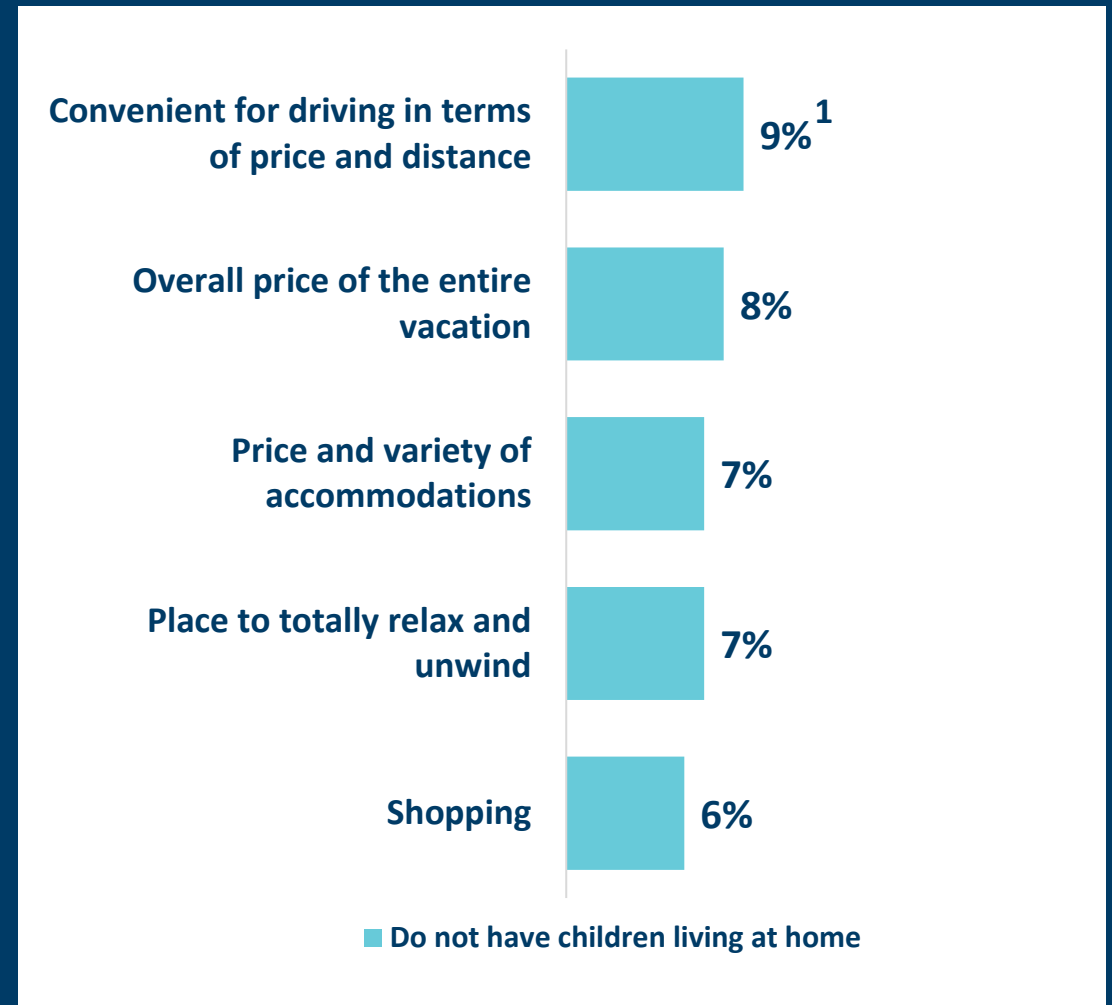
¹ Graph indicates difference in percentage points compared to visitors without children.

Ex: Family bonding time together was rated 17% points higher for visitors with children than visitors without children.

Up to three responses accepted.

IMPORTANT VACATION DECISION FACTORS: VISITORS WITH CHILDREN LIVING AT HOME VS. VISITORS WITHOUT CHILDREN LIVING AT HOME¹

- » First-time visitors without children living at home place more importance on **convenience of driving, cost, and a place to totally relax/unwind** as important vacation decision factors

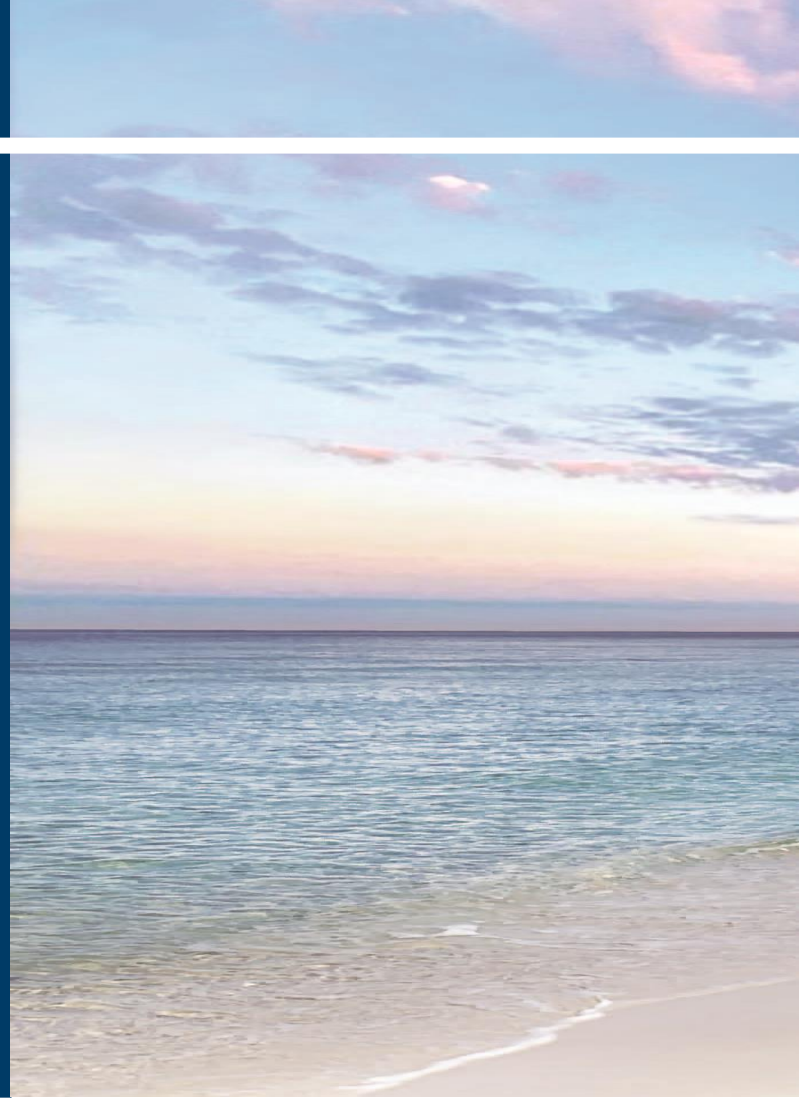


¹ Graph indicates difference in percentage points compared to visitors with children.

Ex: Convenient for driving was rated 9% points higher for visitors without children than visitors with children.

Up to three responses accepted.

VISITOR PROFILE

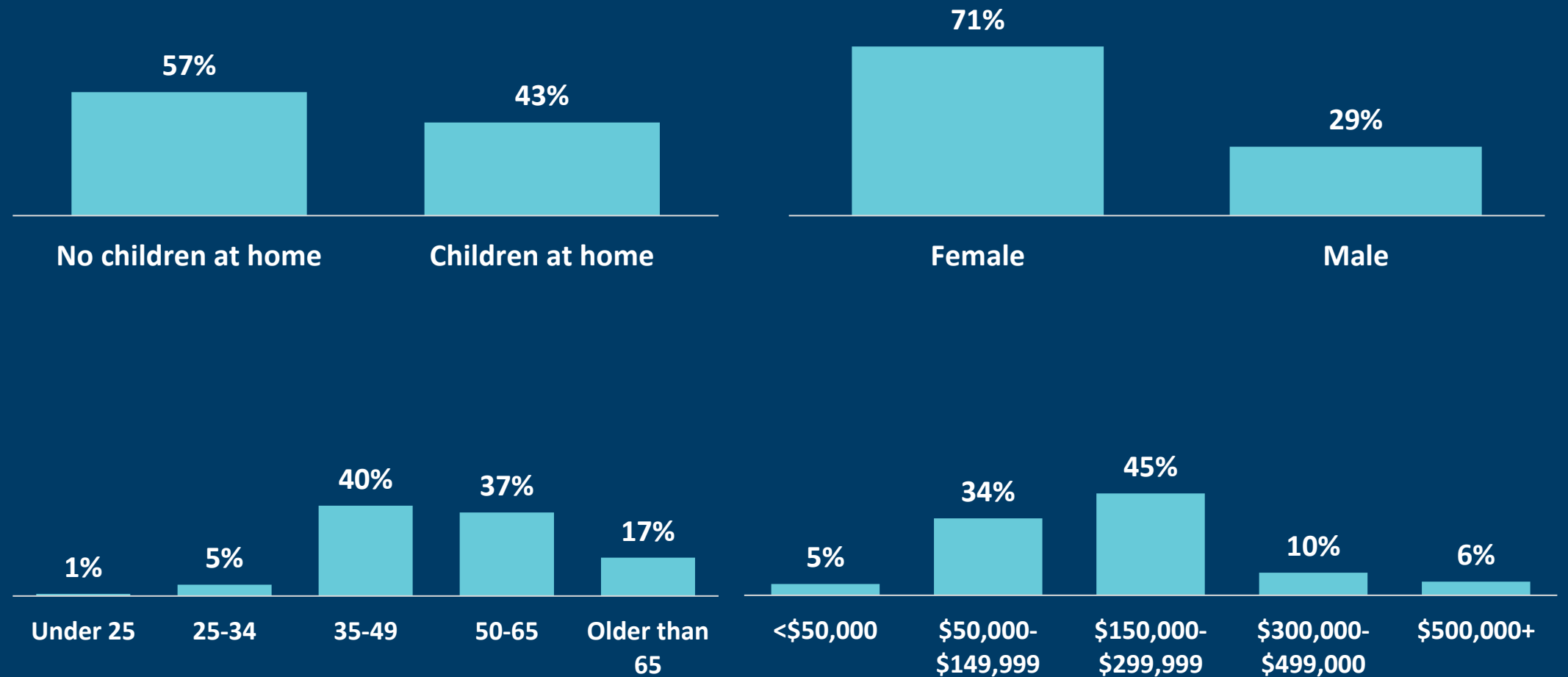


FIRST-TIME VISITOR PROFILE

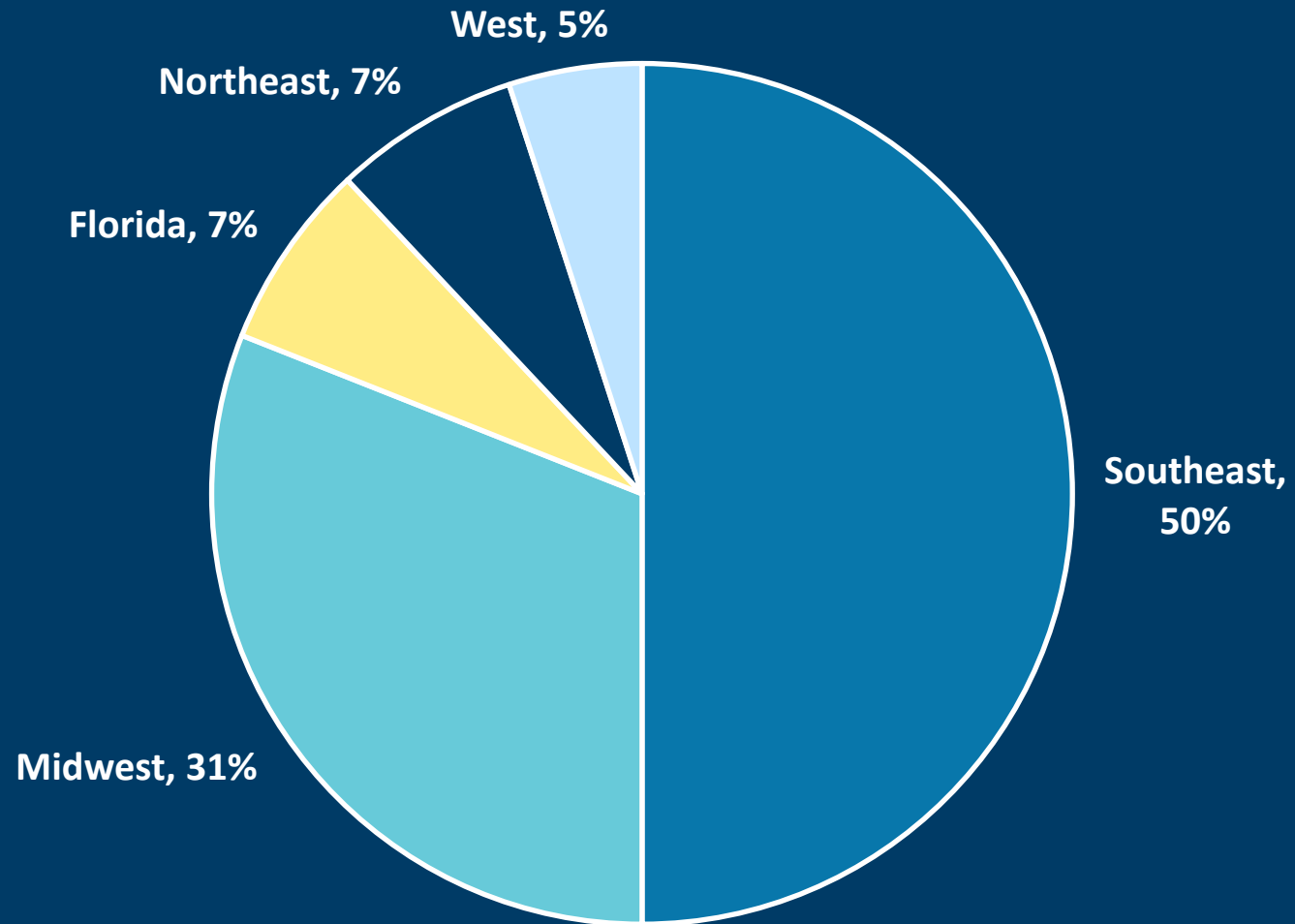
- » First-time visitors who participated in this study were:
 - » **52** years old
 - » Female¹ **(71%)**
 - » Had a median income of **\$186,000**
 - » Did not have children **(57%)**
 - » Are from the Southeast **(50%)**



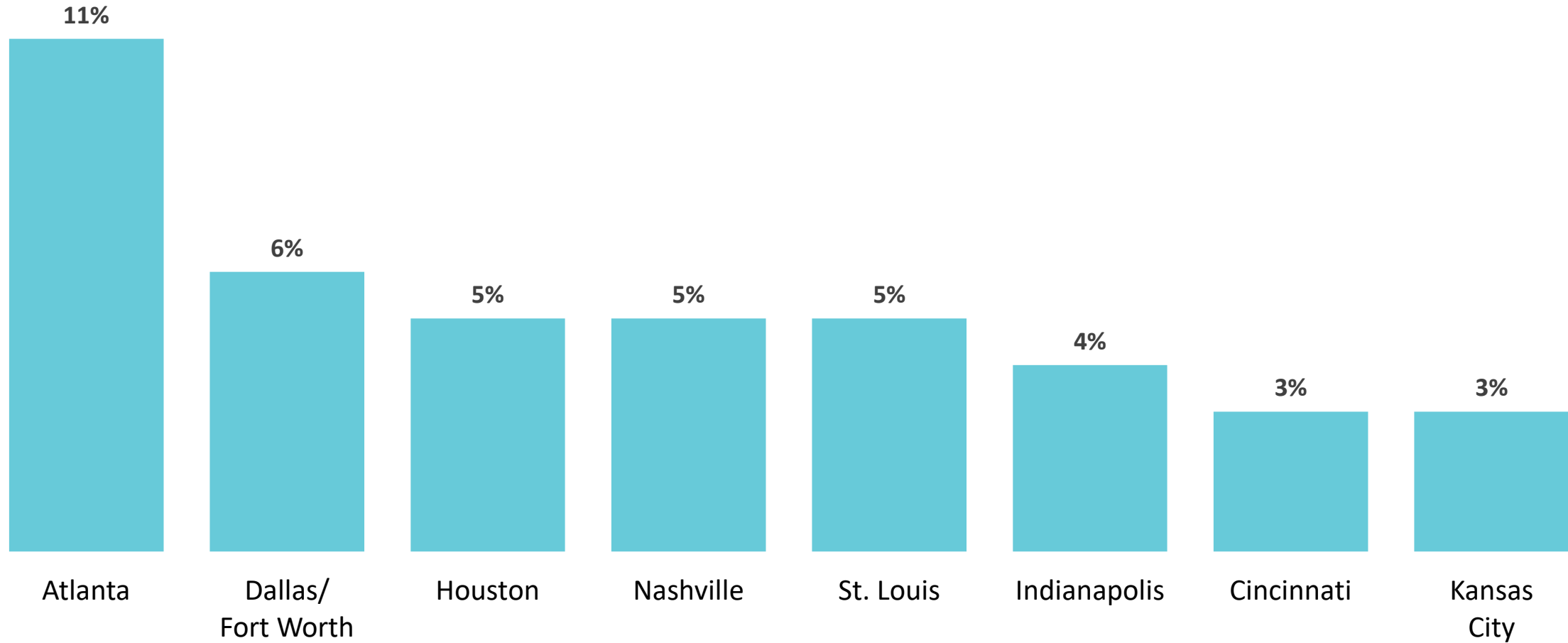
FIRST-TIME VISITOR PROFILE



FIRST-TIME VISITOR ORIGIN REGIONS



FIRST-TIME VISITOR ORIGIN MARKET



FIRST-TIME VISITOR DECISION MAKING

June 2021

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