

# VISIT SOUTH WALTON

**Summer 2022 Visitor Tracking Study**  
June - August 2022



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## Visitor Tracking Study

This report is based on 688 internet and in-person surveys\* with Summer visitors who traveled to South Walton between June 2022 and August 2022.

South Walton's visitor tracking and economic impact metrics in Summer 2022 were impacted by:

- Available units for visitors in Summer 2022 increased 9.5% from 2021

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

# EXECUTIVE SUMMARY



# SEASONAL SNAPSHOT

Summer 2022

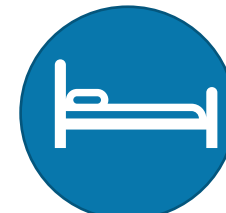
- A decrease in occupancy from 2021 contributed to a decrease in total visitors and a decrease in room nights compared to Summer 2021.
- Property owners & managers were able to increase rates despite a sizeable drop in occupancy as ADR jumped 10.0% in Summer 2022 compared to the previous Summer.
- TDT collections increased 6.5% in 2022 compared to 2021.
- With over 2.41 million visitors this Summer, visitor spending was over \$1.9 billion, up 0.4% from Summer 2021.
- Compared to importance that visitors place on vacation attributes, South Walton was rated lower on providing a sense of seclusion. Conversely, South Walton was rated much higher (than importance visitors place on attributes) for providing off beach activities and an energetic atmosphere with lots of activities



**2,414,000**

TOTAL VISITORS

↓ 7.8%



**1,300,200**

ROOM NIGHTS

↓ 0.3%



**\$1,956,798,100**

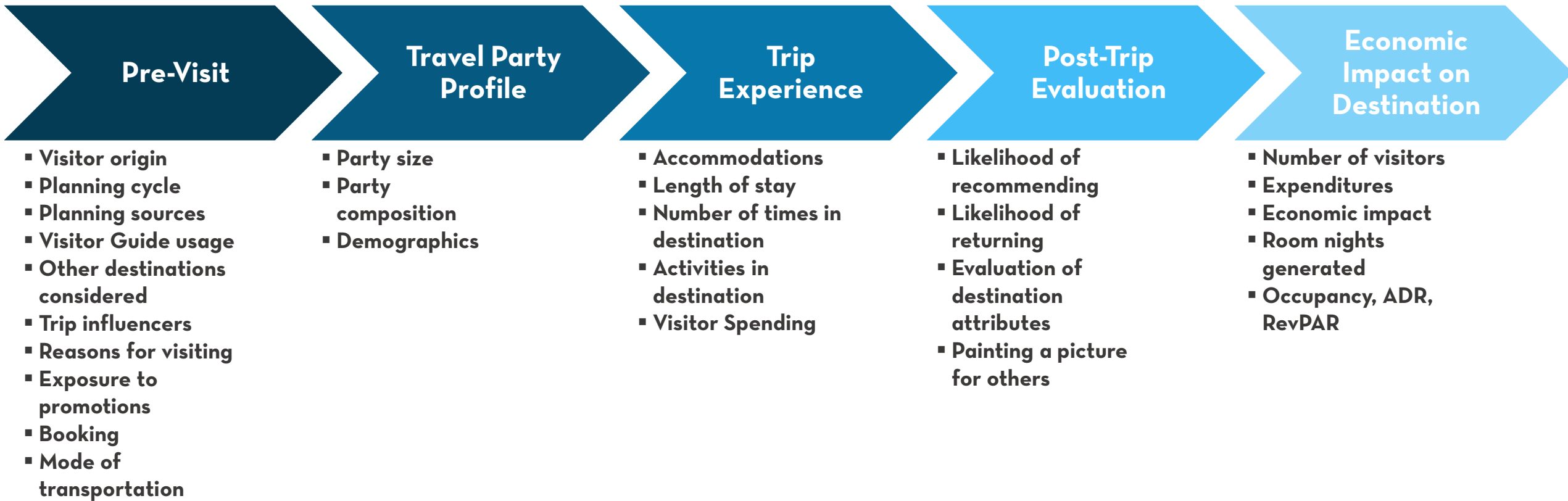
DIRECT SPENDING

↑ 0.4%

vs. 2021

# STUDY OBJECTIVES: MAP THE VISITOR JOURNEY

This report is organized along the visitor's journey as shown below.



# VISITOR JOURNEY: ECONOMIC IMPACT

The bottom line is the economic impact of the visitor's journey, so we start there.



# ECONOMIC IMPACT – SUMMER 2021 VS. 2022

- » A decrease in occupancy from 2021 contributed to a decrease in total visitors and a decrease in room nights compared to Summer 2021.
- » Compared to Summer 2021, ADR jumped 10.0% in Summer 2022. TDT collections increased 6.5% in 2022 compared to 2021.
- » With over 2.4 million visitors this Summer, total visitor spending was over \$1.9 billion, up 0.4% from Summer 2021. Visitors spent more on accommodations compared to 2021.

Visitor Metrics	Summer 2021	Summer 2022	% Δ
<b>Room nights</b>	1,304,575	1,300,200	-0.3%
<b>Total visitors</b>	2,617,300	2,414,000	-7.8%
<b>TDT collections</b>	\$28,451,642	\$30,314,061	+6.5%
<b>Direct spending</b>	\$1,949,648,000	\$1,956,798,100	+0.4%
<b>Economic impact</b>	\$2,885,479,000	\$2,798,221,300 <sup>1</sup>	-3.0%
<b>Occupancy</b>	85.8%	78.1%	-9.0%
<b>Room rates</b>	\$543.44	\$597.88	+10.0%
<b>RevPAR</b>	\$466.06	\$466.94	+0.2%

**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.

<sup>1</sup>The economic impact multiplier for South Walton in 2022 is 1.43. In 2021 it was 1.48.

# ECONOMIC IMPACT - LODGING STATISTICS

**78.1%**

Occupancy

↓ 9.0%

**\$597.88**

ADR

↑ 10.0%

**\$466.94**

RevPAR

↑ 0.2%

# VISITOR JOURNEY: PRE-VISIT

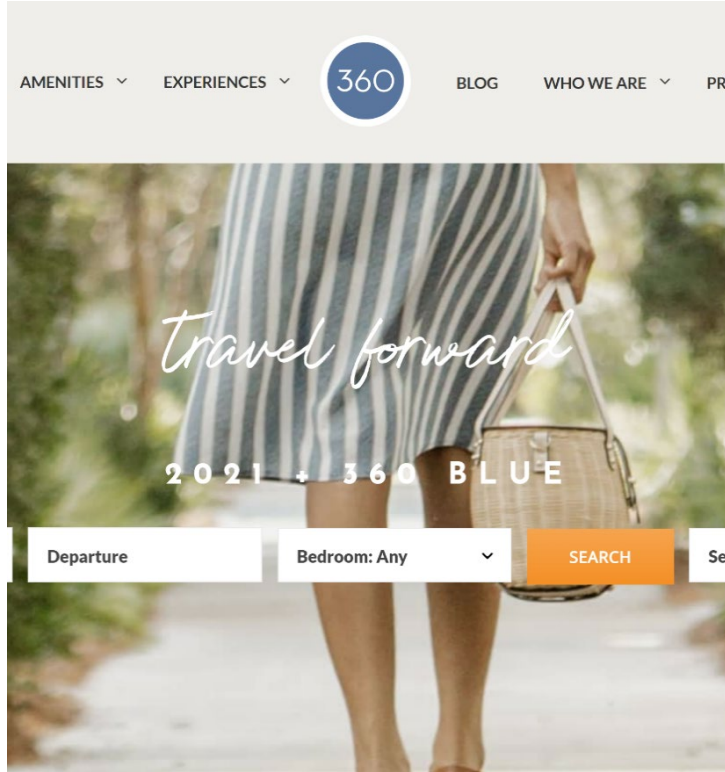


# PLANNING CYCLE

- » **2 in 3** visitors plan a South Walton Summer vacation at least 3 months in advance
- » Average trip planning cycle began **108 days** before the trip (**117 days in 2021**)
- » **Half** (-4% points from 2021) of Summer visitors considered only 1 of the South Walton beaches as opposed to deciding among several



# TOP TRIP PLANNING SOURCES\*



Vacation rental website **55%**



Friends/family **44%**



Search engines **26%**

\*Multiple responses permitted.

# SOUTH WALTON VISITOR GUIDE

- » **About 1 in 4** visitors viewed (mostly online) the South Walton Visitors Guide before going to South Walton
- » Visitors Guide received a rating of **8.0 out of 10<sup>1</sup>** (+0.6 points from 2021)



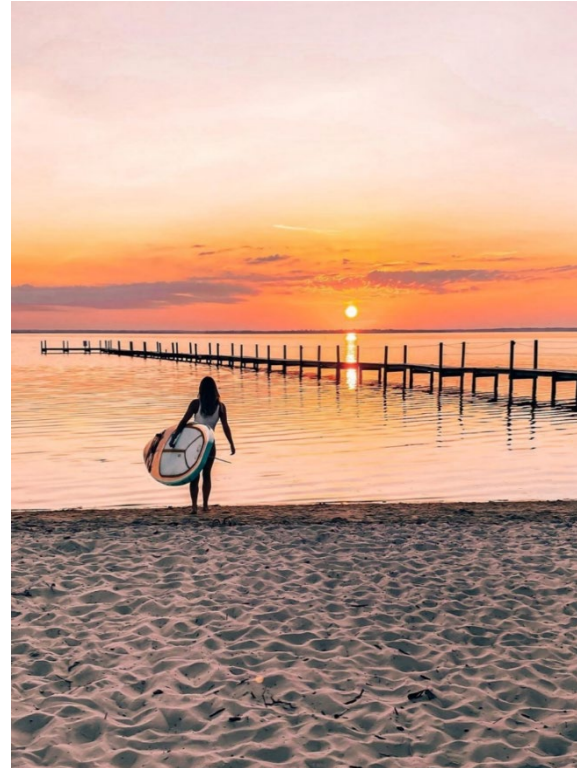
# TOP REASONS FOR VISIT\*



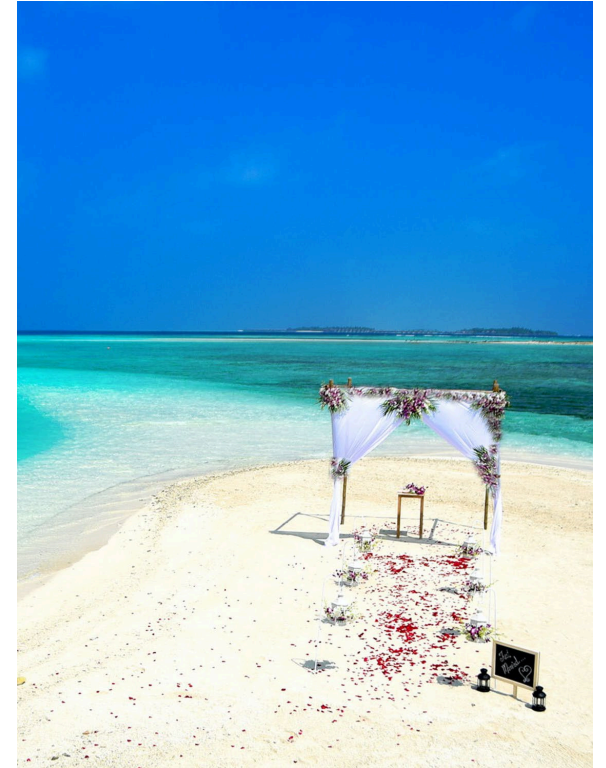
Family vacation **74%**



Relax & unwind **53%**



Annual routine **21%**



Special occasion **12%**

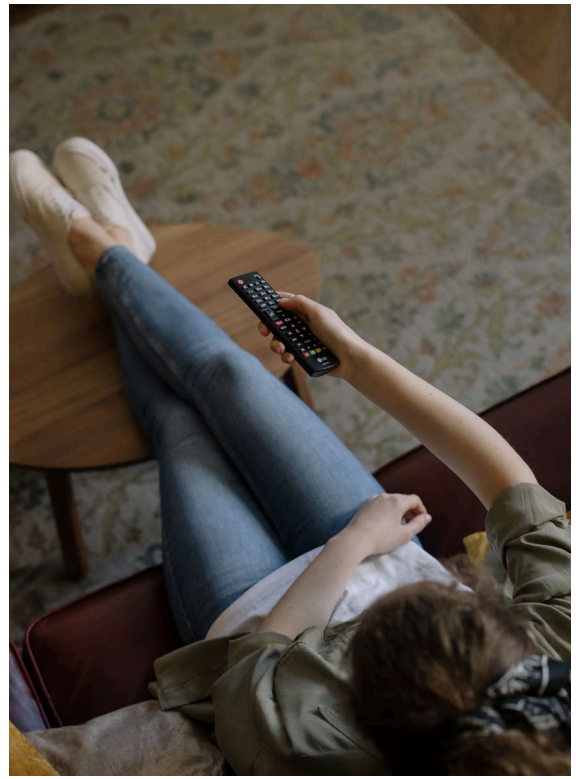
# EXPOSURE TO ADVERTISING

- » **29%** of visitors have recently noticed promotions about South Walton
- » This information influenced **10%** of all visitors to visit South Walton



# TOP SOUTH WALTON PROMOTIONS\*

Base: 29% of visitors who noticed advertising



Television **26%**



Other social media accounts  
**24%**



Magazine article **19%**



VisitSouthWalton.com  
**19%**

Discover the beauty of South Walton, Florida. South Walton is 26 miles of sugar-white sand beaches, turquoise water and 16 acclaimed beach neighborhoods, each with its own personality and style.

\*Multiple responses permitted.

# TOP BOOKING SOURCES

Vacation Rental  
Company  
**47%**

Directly with  
hotel/condo  
**29%**

VRBO  
HomeAway  
**13%**



# VISITOR TRANSPORTATION

- » **79%** of visitors drove to South Walton
- » **21%** who flew used the following airports:

**56%**

Northwest Florida Beaches  
International Airport



**31%**

Destin-Ft. Walton Beach  
Airport



**7%**

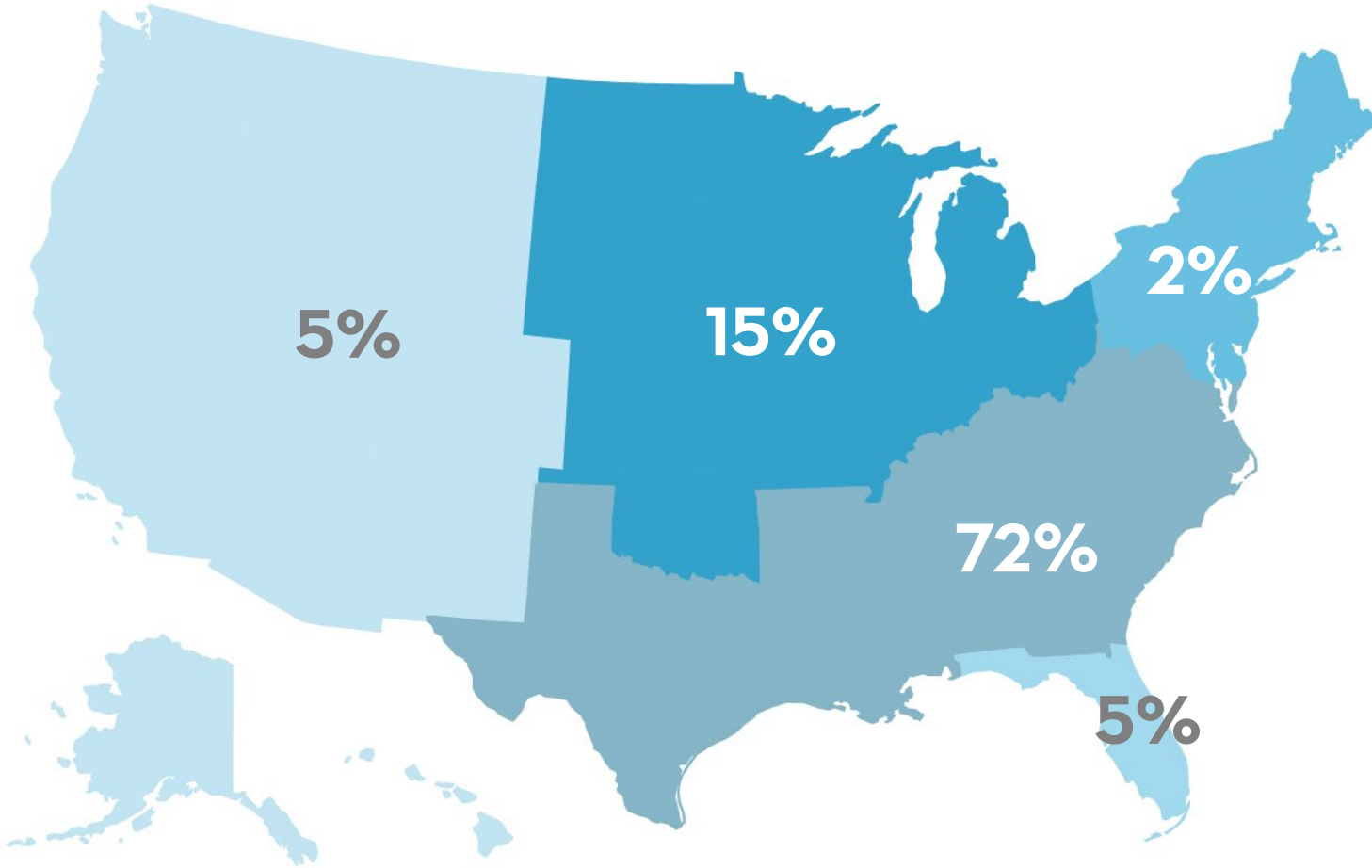
Pensacola International  
Airport



# VISITOR JOURNEY: TRAVEL PARTY PROFILE

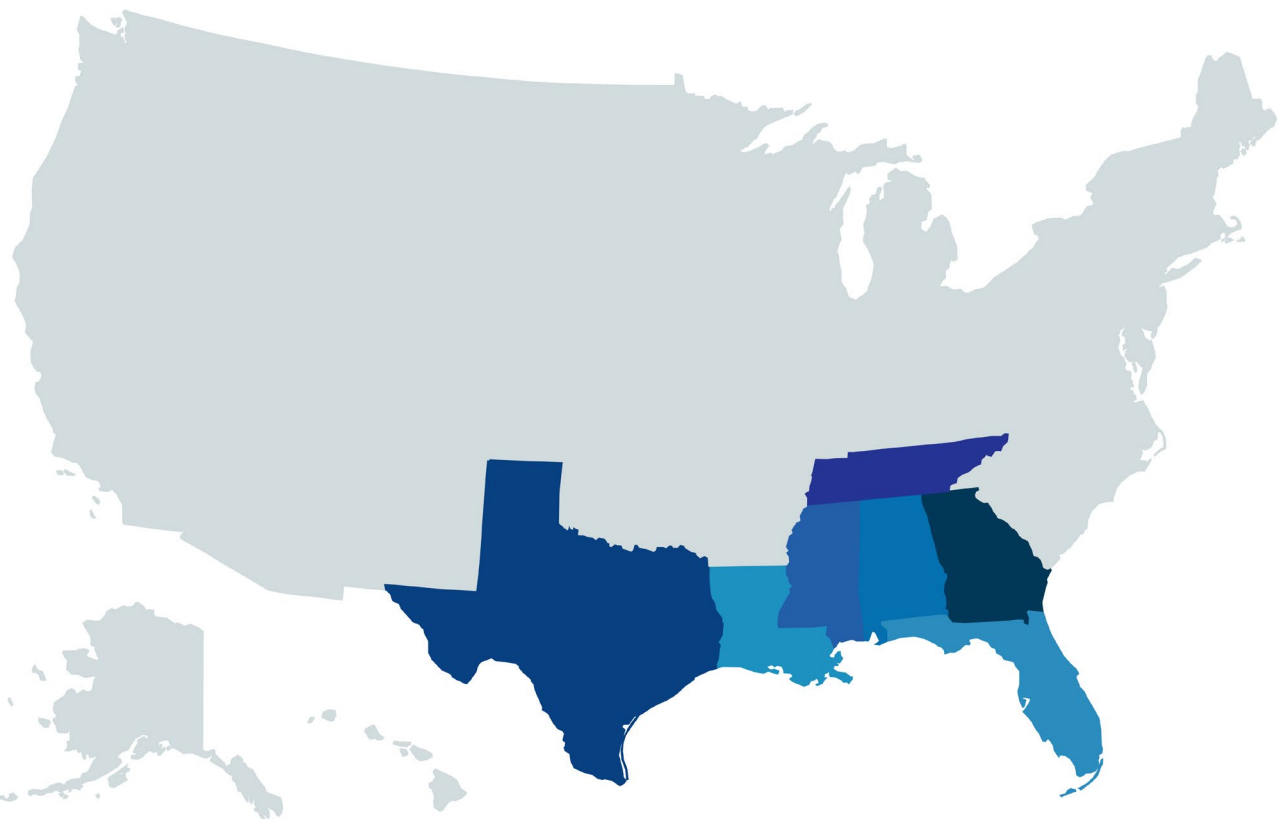


# ORIGIN OF SUMMER VISITORS



1% of visitors traveled to South Walton from outside of the U.S.

# ORIGIN OF SUMMER VISITORS



**67%** of visitors are from 7 states

- 15%** Georgia
- 15%** Texas
- 11%** Tennessee
- 10%** Alabama
- 6%** Mississippi
- 5%** Florida
- 5%** Louisiana

**49%** of visitors are from 9 markets

- 14%** Atlanta
- 8%** Dallas-Fort Worth
- 6%** Nashville
- 4%** Birmingham
- 4%** Houston
- 4%** Memphis
- 3%** Columbus, OH
- 3%** Little Rock-Pine Bluff
- 3%** Mobile-Pensacola

# TRAVEL PARTY SIZE AND COMPOSITION

The typical visitor traveled in a party composed of **6.0** 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 (**64%**<sup>1</sup>)
  - » Median household income of **\$167,500**
  - » Estimated average HHI = **\$211,000**
  - » From the Southeast (**77%**)

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

# VISITOR JOURNEY: TRIP EXPERIENCE



# TOP ACCOMMODATIONS

**66%** Condos, rental houses, etc.



**13%** Personal home/condo



**12%** Hotels



# TOP VISITOR ACTIVITIES\*

Beach **91%**



Restaurants **87%**



Relax and unwind **80%**



Family time, reading, cooking **69%**



Shopping, antiquing **62%**



\*Multiple responses permitted.

# LENGTH OF STAY

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



\*Visitors who stayed 30 or fewer nights.

# FIRST-TIME AND EXPERIENCED VISITORS

- » **12%** were first-time visitors
- » **35%** had visited more than 10 times



# TRAVEL PARTY EXPENDITURES<sup>1</sup>

- » Travel parties spent **\$942** a day
- » Travel parties spent **\$4,900** on their trip



<sup>1</sup> Visitors who stayed for up to 30 nights. Includes day trippers.

# BEACH SAFETY

- » **88%** of Summer visitors know there are flags posted along the beaches to indicate how safe it is to go into the water
- » **Over 4 in 5** Summer visitors are aware of the beach flag warning meanings
- » **49%** of Summer visitors are aware of the consequences of entering the Gulf during double red flag conditions



# VISITOR JOURNEY: POST TRIP EVALUATION



# VISITOR SATISFACTION

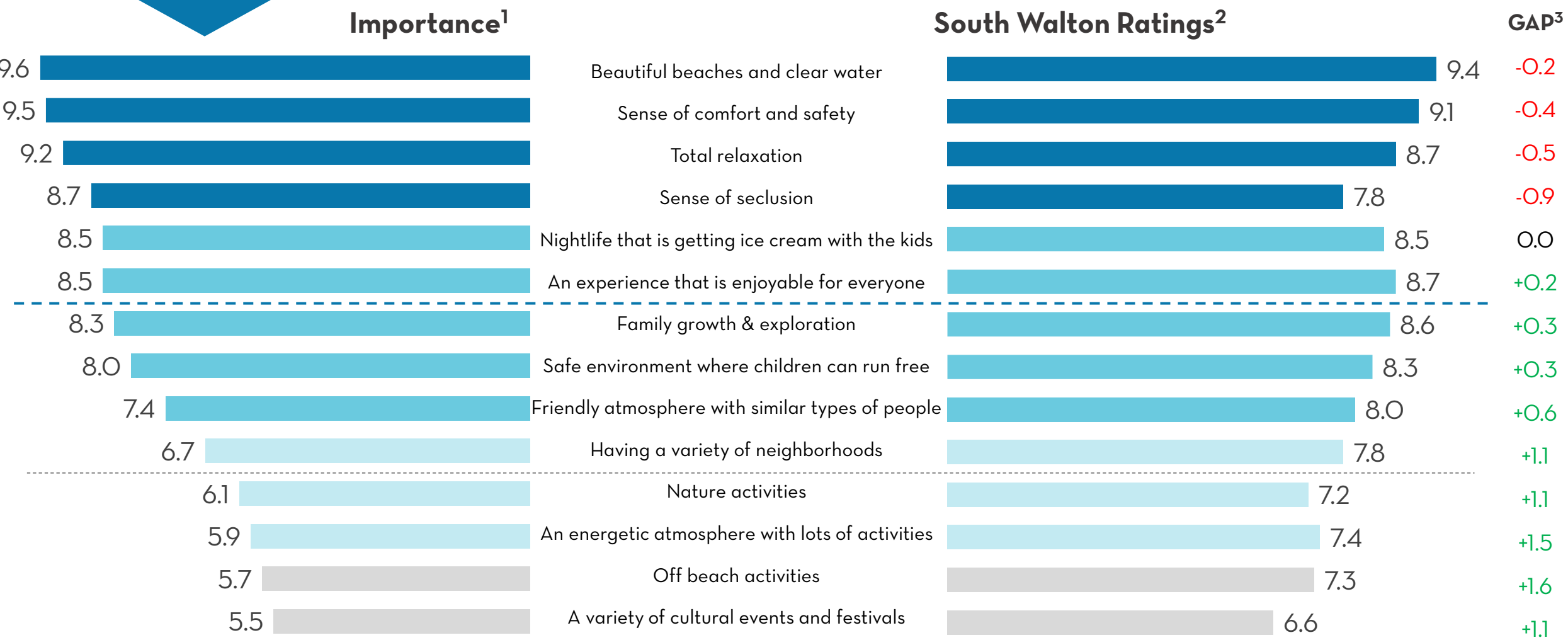
- » Visitors gave South Walton a rating of **9.1**<sup>1</sup> as a place to vacation
- » **73%** will definitely return to South Walton<sup>2</sup>



<sup>1</sup>10 = Excellent; 1= Poor

<sup>2</sup>3% of all visitors will probably not return to South Walton for the following reasons:  
1. Too crowded 2. Traffic was a problem and 3. Parking was a problem.

# VACATION ATTRIBUTE IMPORTANCE VS. RATINGS



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

<sup>2</sup> Rated on a scale from 1 to 10 where 10 is excellent and 1 is poor.

<sup>3</sup> GAP equals the difference between the importance of an attribute and the rating of SW on that attribute.

For example, a “sense of comfort and safety” is extremely important to visitors with a score of 9.6. Visitors rated SW as 7.6 on its ability to make them feel comfortable. Hence, the GAP is -2.0.

# VISITOR DESCRIPTIONS OF SOUTH WALTON



*"Beautiful, clean beaches. Crystal clear water. Fun for people of all ages."*



*"The ultimate family getaway to the most beautiful beach in the world, with shopping, biking and relaxed family atmosphere that is unmatched anywhere else I have been."*



*"The Hamptons of the South"*



# YEARLY COMPARISONS

# VISITOR PROFILE - SUMMER 2021 VS. 2022

Visitor Metrics	Summer 2021	Summer 2022
Travel party	5.9	6.0
Kids <20	70%	67%
Median age	52	52
Estimated median household income	\$189,600	\$167,500
Stayed in condo/rental house	51%	66%
Drove	82%	79%
Nights spent	5.2	5.2
Direct expenditures (travel party for entire trip)	\$4,490	\$4,900
1 <sup>st</sup> time visitor	15%	12%
10+ visits to South Walton	35%	35%

# VISITOR PROFILE - SUMMER 2021 VS. 2022

Top Origin States	Summer 2021	Summer 2022
<b>Georgia</b>	16%	15%
<b>Texas</b>	16%	15%
<b>Tennessee</b>	11%	11%
<b>Alabama</b>	10%	10%
<b>Mississippi</b>	4%	6%

Origins - Regions	Summer 2021	Summer 2022
<b>Southeast</b>	75%	77%
<b>Midwest</b>	18%	15%
<b>West</b>	4%	5%
<b>Northeast</b>	3%	2%
<b>International</b>	<1%	1%

# VISITOR PROFILE - SUMMER 2021 VS. 2022

Top Visitor Activities	Summer 2021	Summer 2022
Beach	96%	91%
Restaurants	89%	87%
Relax and unwind	84%	80%
Family time, reading, cooking	73%	69%
Shopping, antiquing	64%	62%
Biking, running	45%	40%
Water sports	29%	26%
Bars, nightclubs	24%	22%
Attractions	15%	16%
State parks	15%	15%
Golf or tennis	16%	14%
Special events	13%	14%
Hiking, nature walks, eco tours	13%	13%
Dune lakes	9%	8%
Art galleries, museums, cultural events	8%	7%
Spas	7%	5%
Business meetings, conferences	1%	4%
Other	3%	4%

# VISITOR PROFILE - SUMMER 2021 VS. 2022

Visitor Metrics	Summer 2021	Summer 2022
<b>Will return to South Walton</b>	94%	95%
<b>Rating for overall experience<sup>1</sup></b>	9.0	9.1
<b>Viewed Visitors Guide<sup>2</sup></b>	22%	24%
<b>Planned trip 6+ months out</b>	37%	33%
<b>Used VisitSouthWalton.com</b>	18%	14%
<b>Used 1 of 16 beaches' websites</b>	26%	20%
<b>Use the term "South Walton"</b>	21%	20%

# DETAILED FINDINGS



# VISITOR JOURNEY: PRE-VISIT



# PLANNING CYCLE



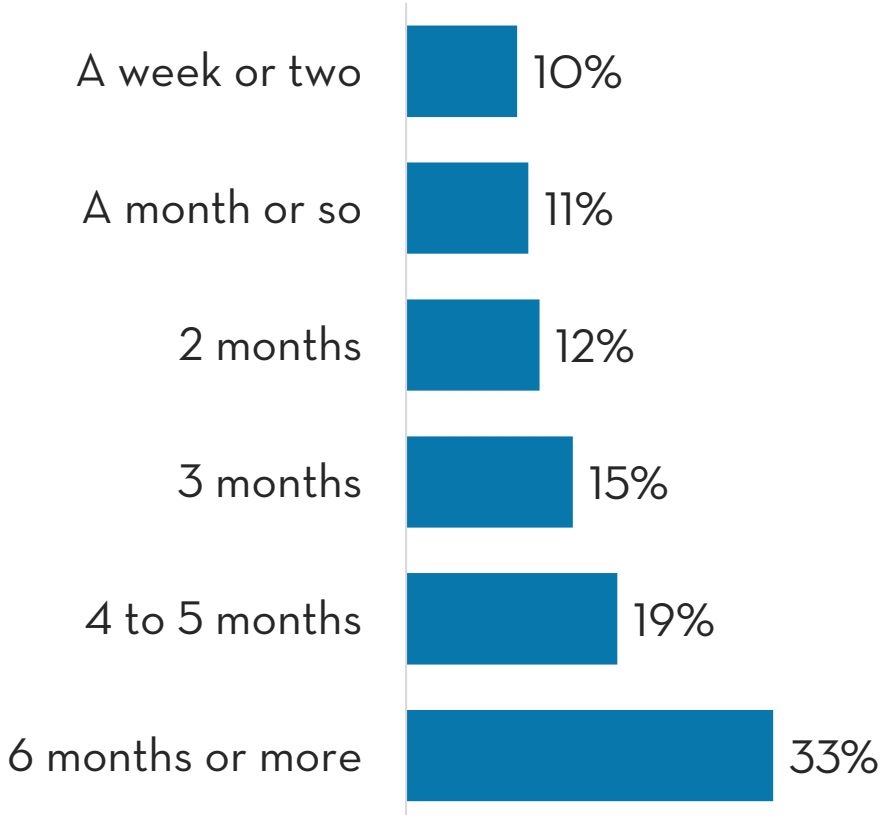
**2 in 3** visitors plan a Summer South Walton vacation at least **3 months out**



**Over 1 in 5** visitors to South Walton have **a short (a month or less) planning cycle**



Average trip planning cycle began **108 days** before the trip (**117 days** in 2021)



# OTHER DESTINATIONS CONSIDERED



**Half** (-4% points from 2021) of Summer visitors only considered 1 of the South Walton Beaches



**20%** use the term “South Walton” when referring to the area

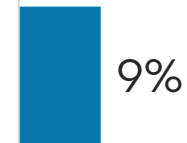
Only considered 1 of the South Walton beaches



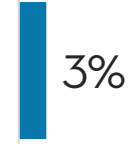
Considered another 1 of the 16 South Walton beaches



Considered vacationing outside of South Walton, but in FL



Considered vacationing at a beach outside of FL



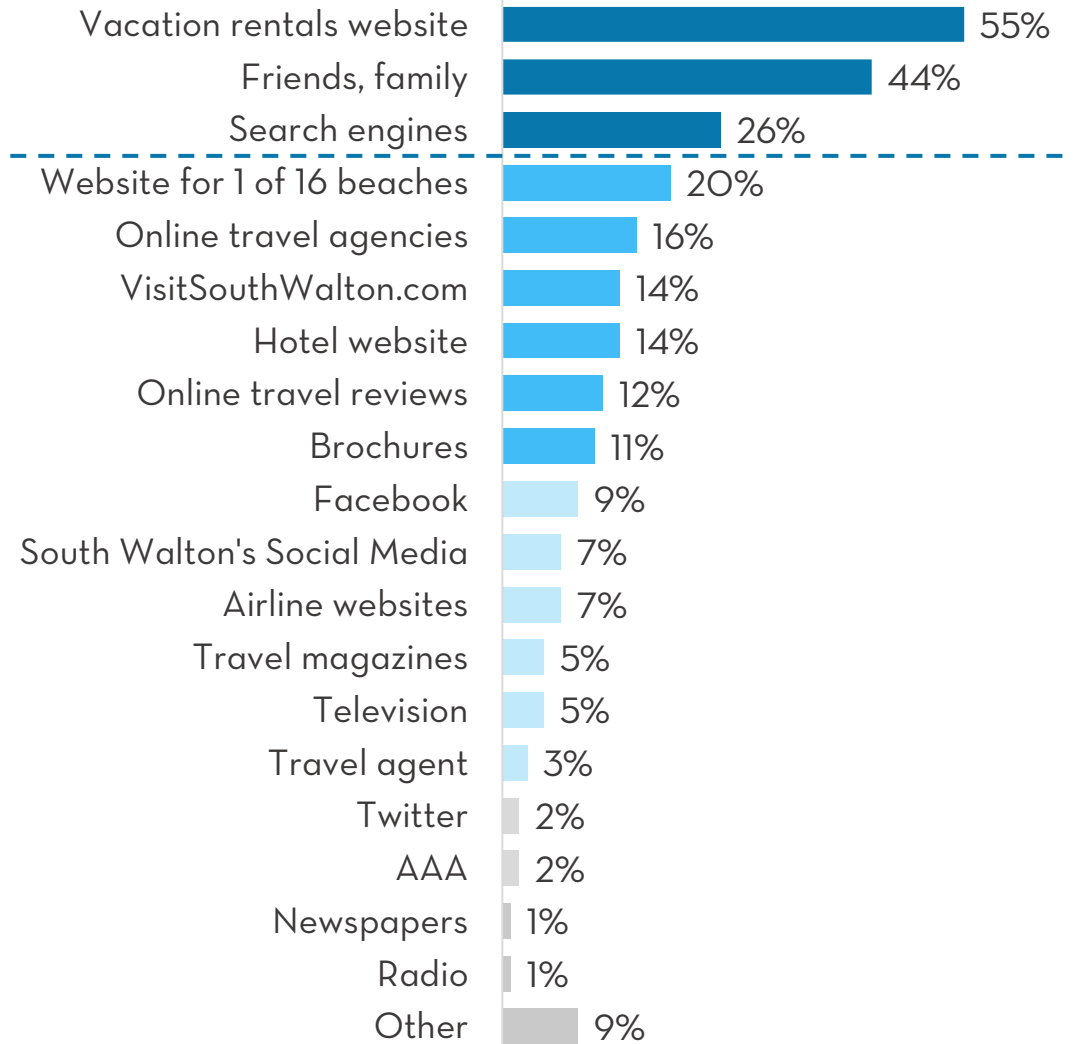
# TRIP PLANNING SOURCES<sup>1</sup>

**Over half** of visitors used a vacation rental website to help plan their trip to South Walton

**Over 2 in 5** visitors asked their friends and family for advice to help plan their trip to South Walton

**Over 1 in 4** visitors used search engines such as Google to help plan their trip to South Walton

**5%** (+4% points from 2021) of visitors used television to help plan their trip to South Walton



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

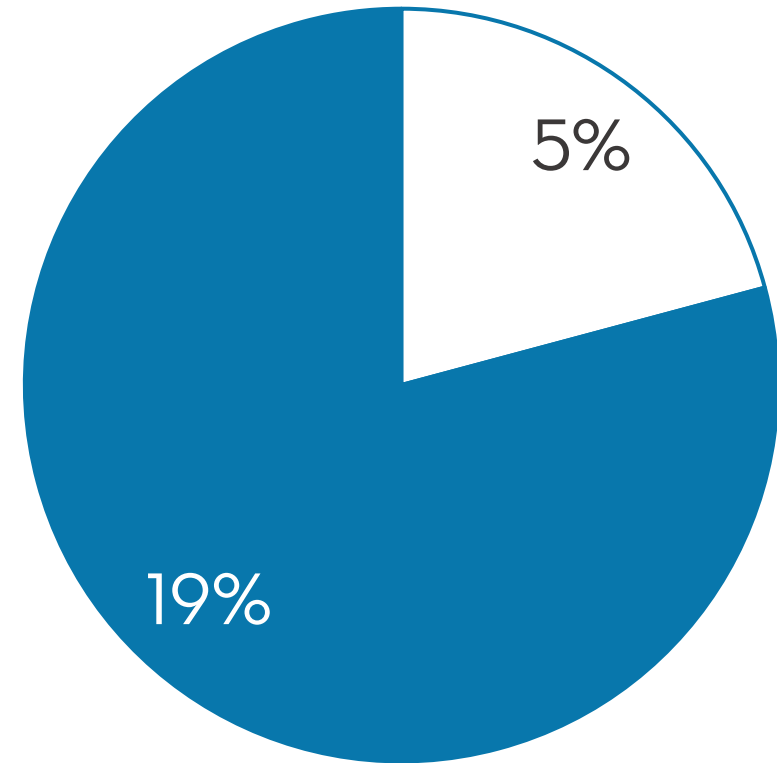
# SOUTH WALTON VISITOR GUIDE



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



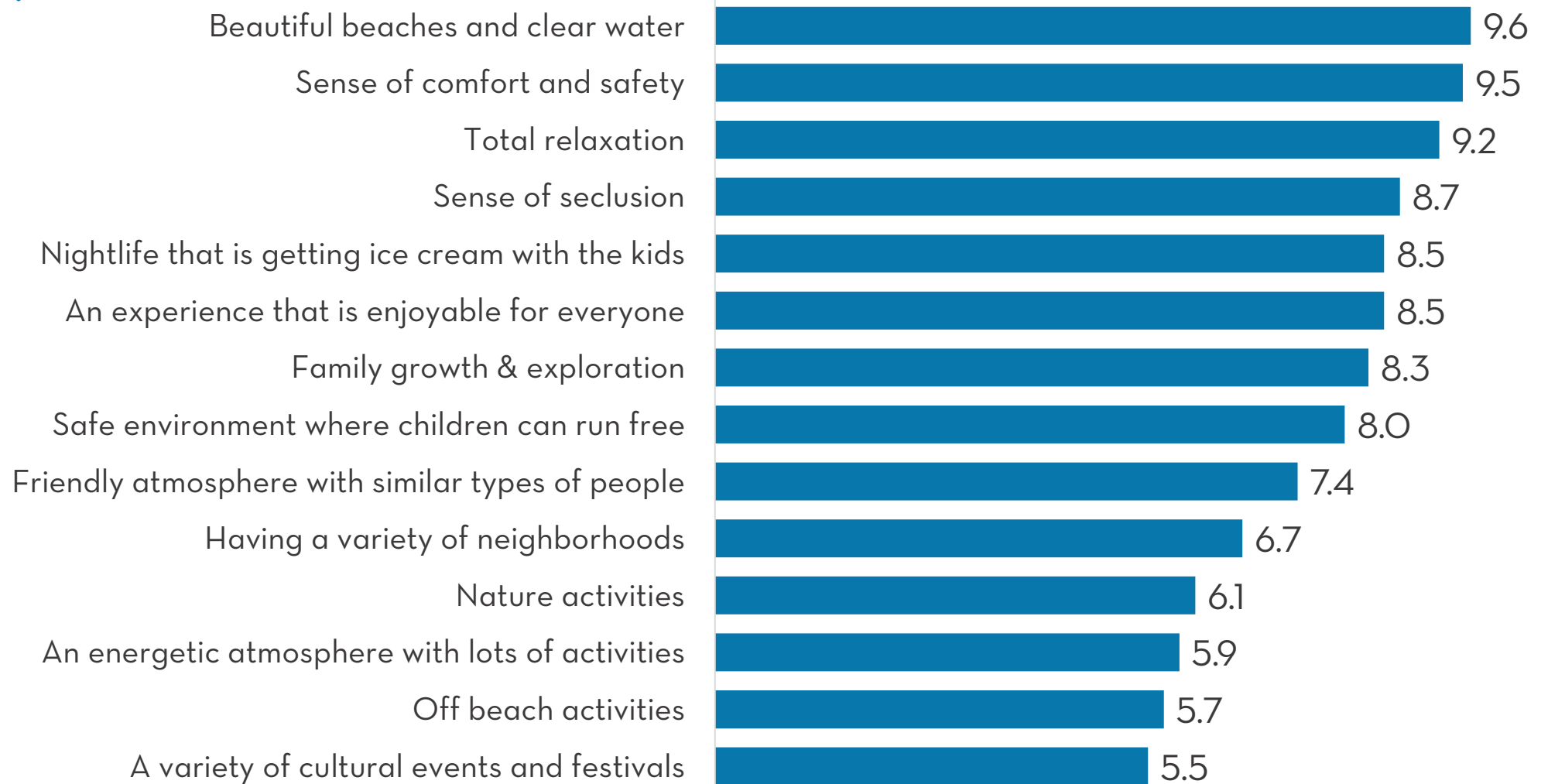
Visitors Guide received a rating of **8.0 out of 10**<sup>1</sup> (+0.6 points from 2021)



□ Print version   ■ Online version

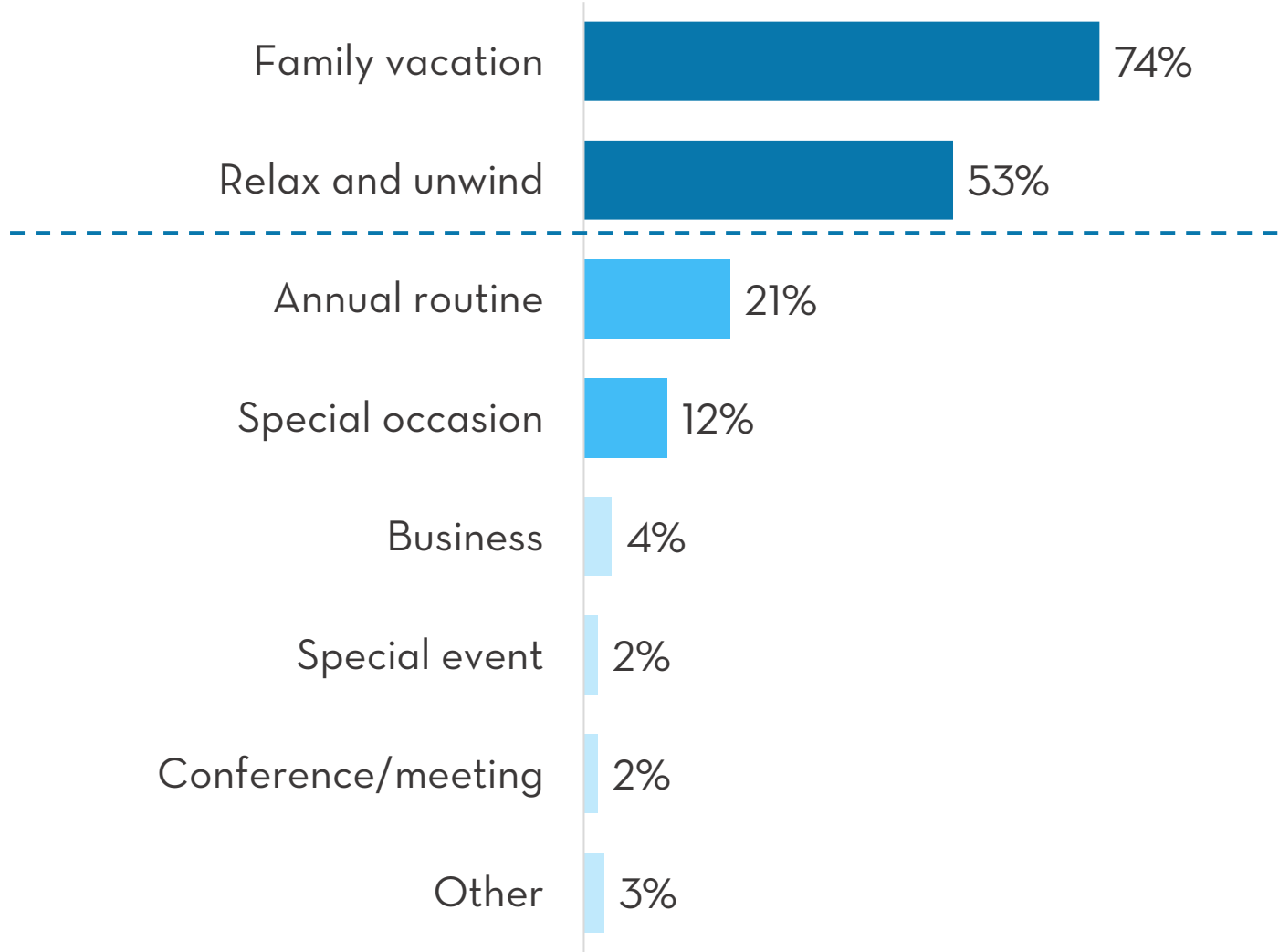
<sup>1</sup>Rated on a 10-point scale where 10 is extremely useful and 1 is not at all useful.

# IMPORTANT VACATION DESTINATION ATTRIBUTES<sup>1</sup>



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

# REASONS FOR VISITING<sup>1</sup>



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

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

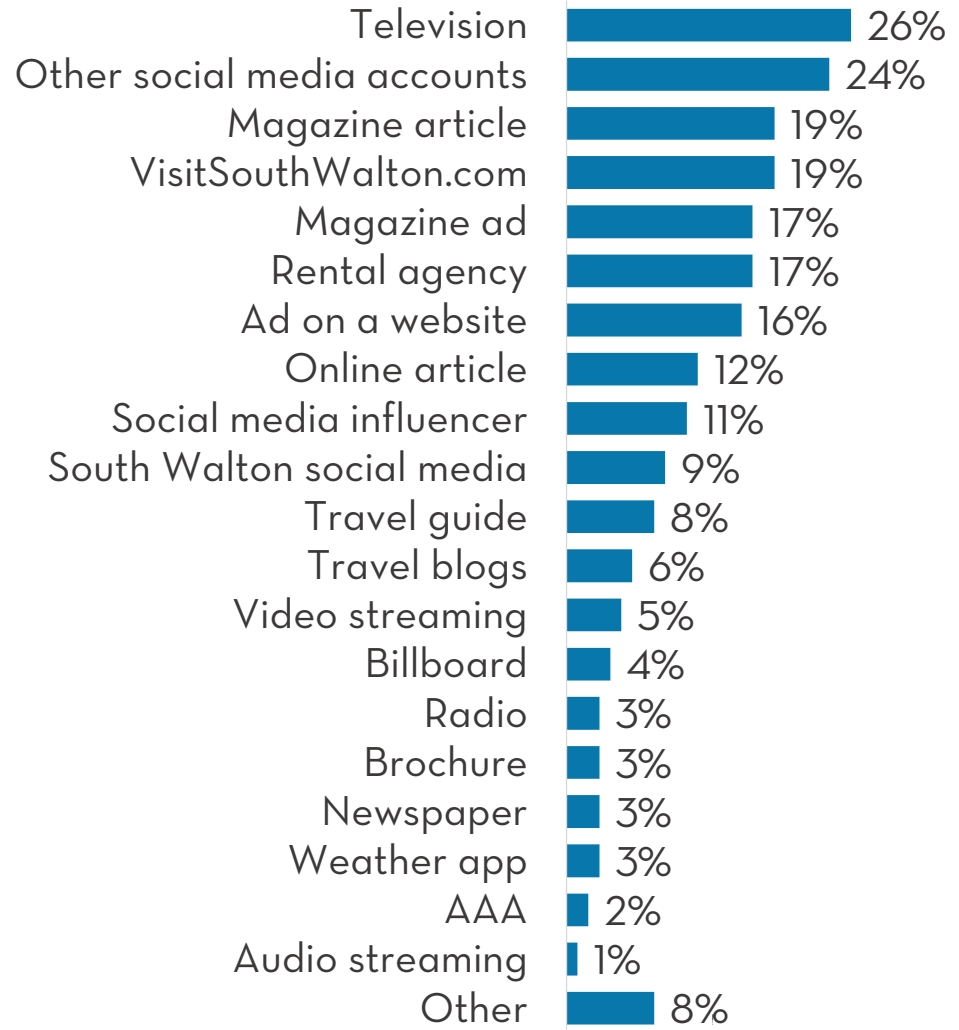


**29%** (-2% points from 2021) of Summer visitors have recently seen, read or heard advertising, promotions or travel stories about South Walton



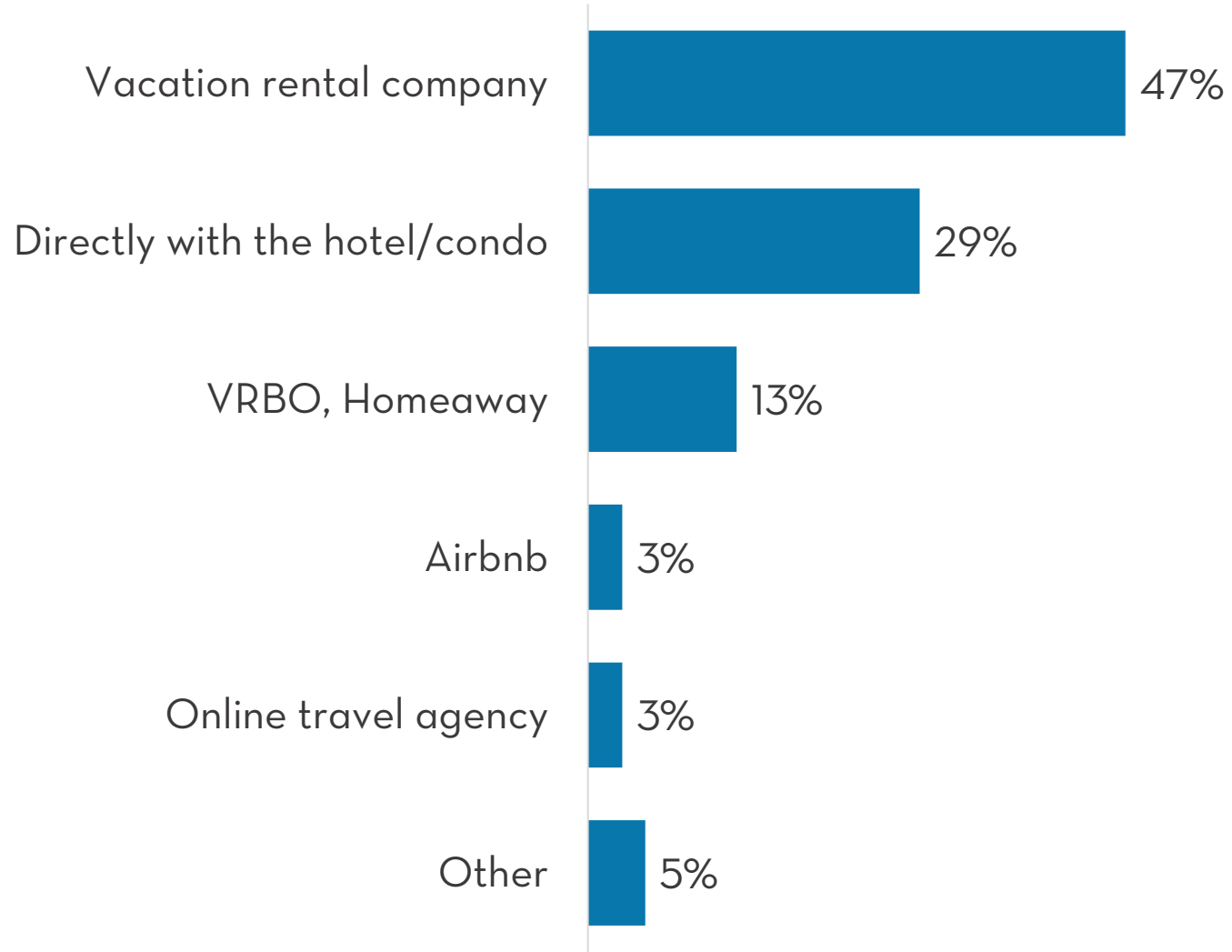
This information influenced **10%** (+1% points from 2021) of all visitors to visit South Walton

Base: **29%** of visitors who noticed advertising




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


# BOOKING ACCOMMODATIONS



# VISITOR TRANSPORTATION

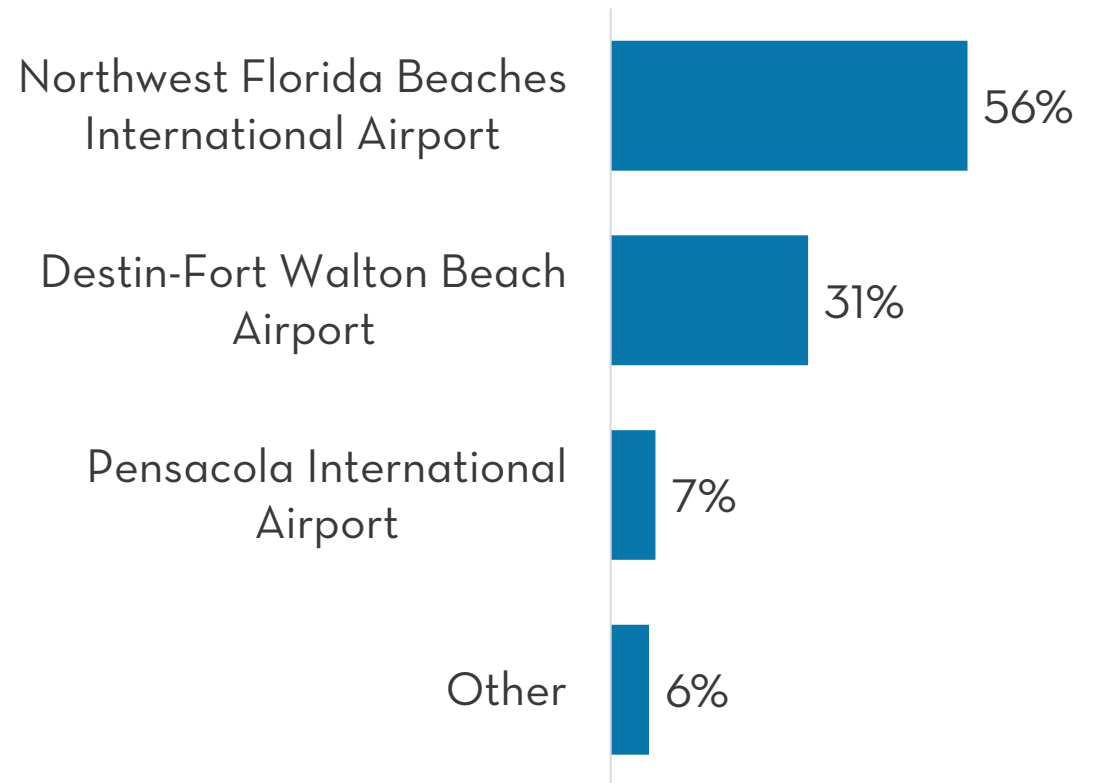


**79%** of Summer visitors drove to South Walton



**37%** (-13% points from 2021) of those who drove were aware that there were direct flights from their city to the South Walton area, yet **36%** were not sure if there were direct flights available

**21%** who **flew** used the following airports:



# VISITOR JOURNEY: TRAVEL PARTY PROFILE



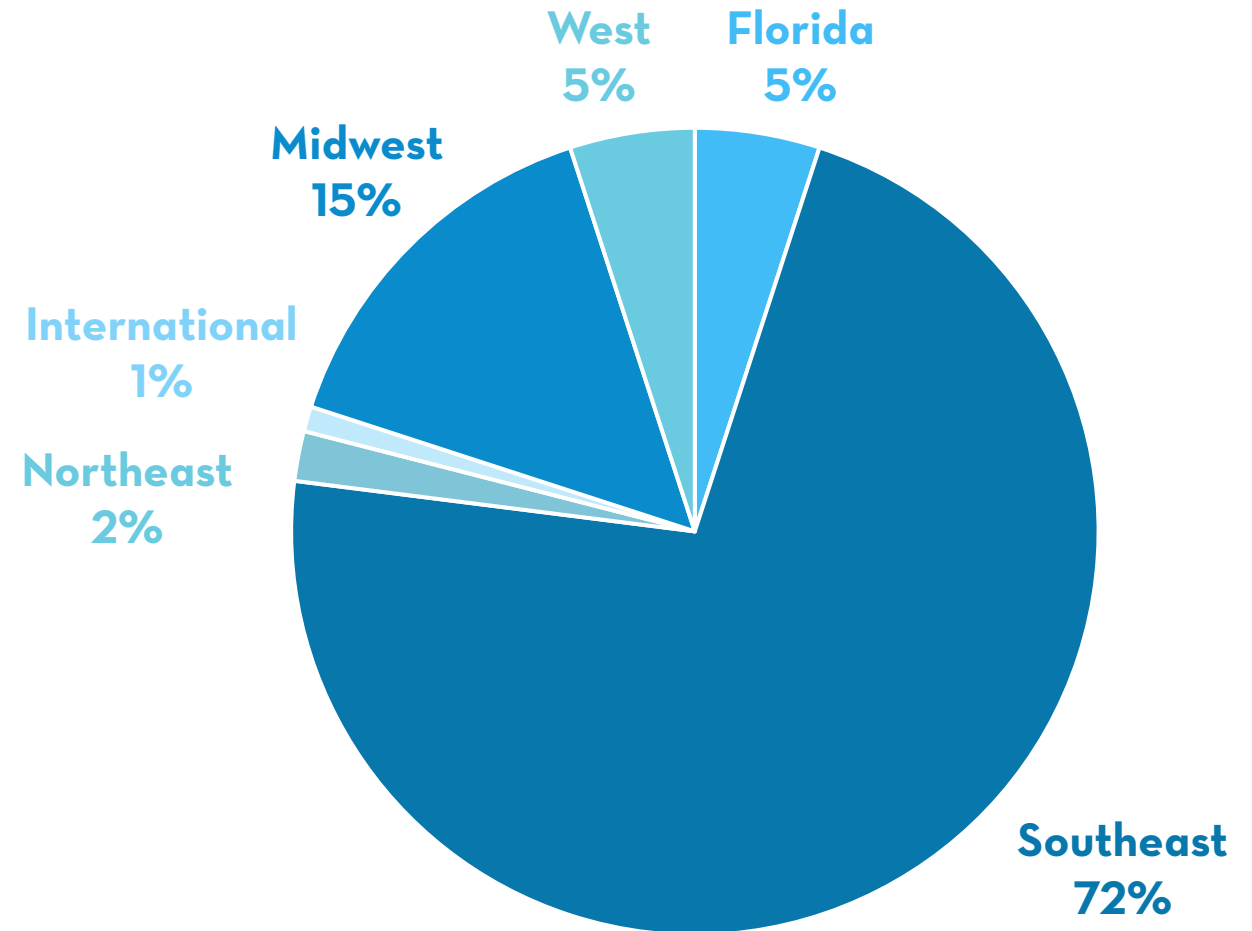
# ORIGIN OF SUMMER VISITORS

State	% of Visitors
Georgia	15%
Texas	15%
Tennessee	11%
Alabama	10%
Mississippi	6%
Florida	5%
Louisiana	5%
Arkansas	4%
Kentucky	3%
Missouri	3%
North Carolina	3%
Ohio	3%
Oklahoma	3%
Illinois	2%



# ORIGIN OF SUMMER VISITORS

Top Origin Markets	% of Visitors
Atlanta	14%
Dallas-Fort Worth	8%
Nashville	6%
Birmingham	4%
Houston	4%
Memphis	4%
Columbus, OH	3%
Little Rock-Pine Bluff	3%
Mobile-Pensacola	3%



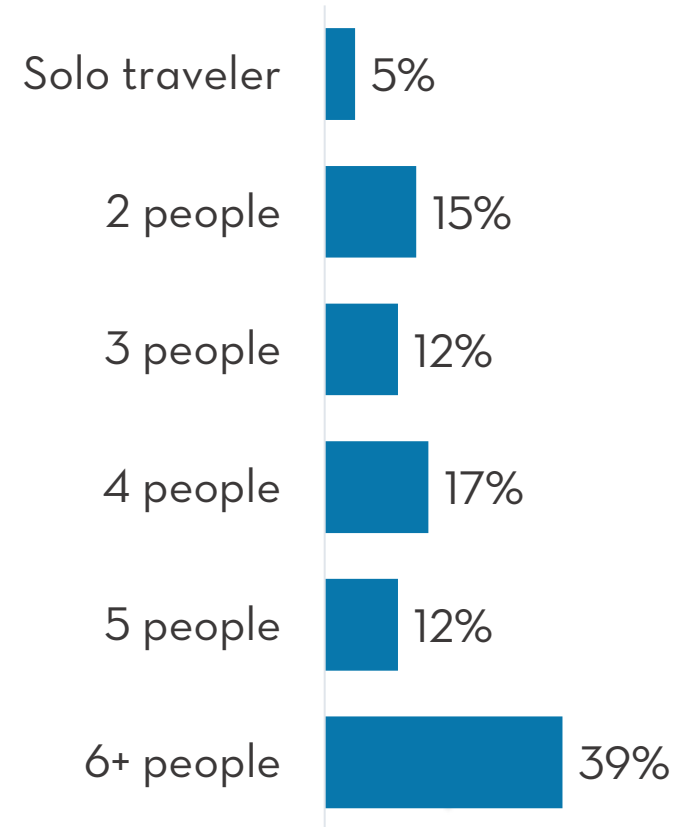
# TRAVEL PARTY SIZE AND COMPOSITION



Visitors traveled in a party composed of **6.0** people



**67%** of visitors traveled with children under the age of 20

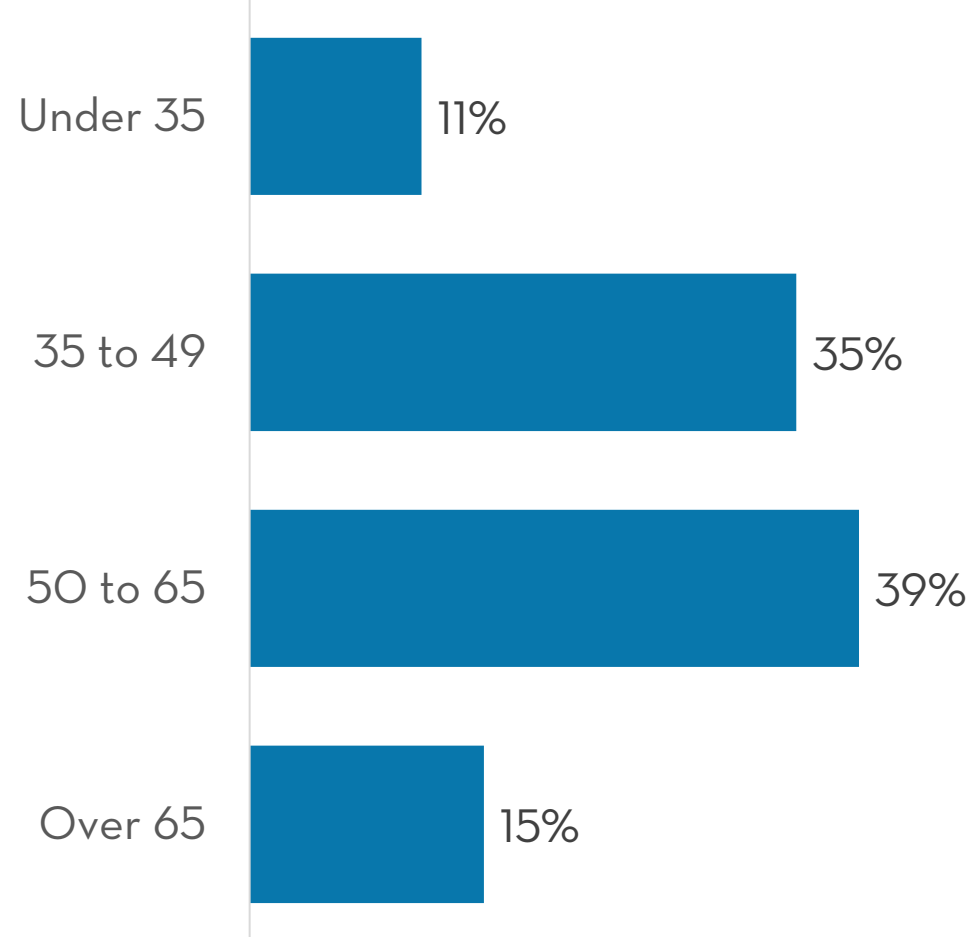


<sup>1</sup>Multiple responses permitted.

# AGE OF SUMMER VISITORS



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

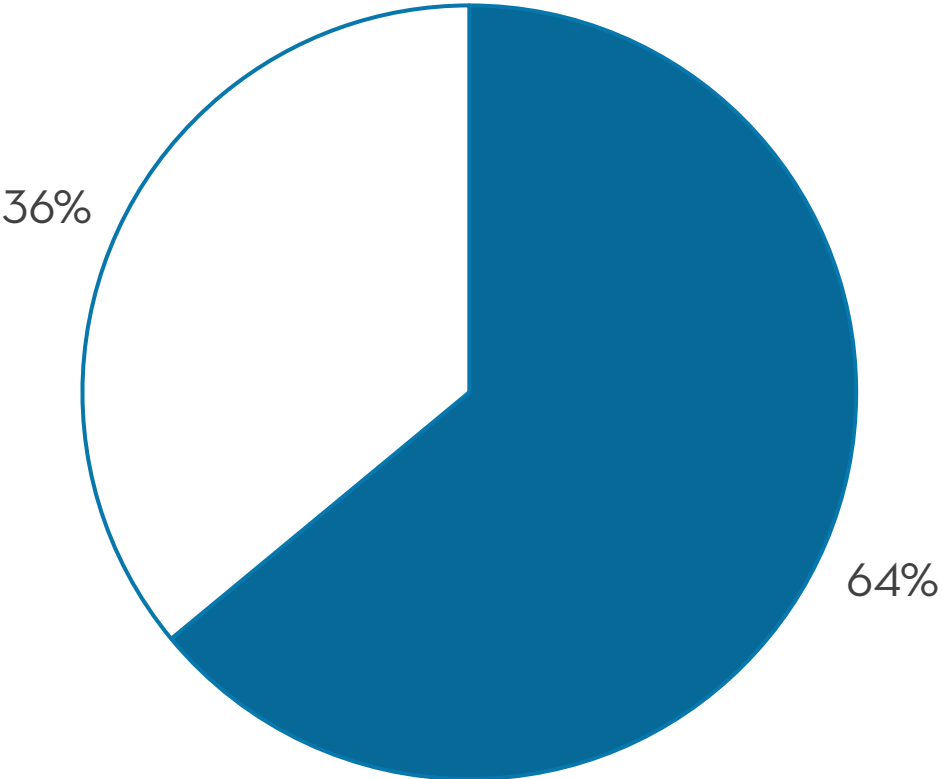


# TOTAL HOUSEHOLD INCOME IN 2021

Summer visitors had a **median** household income of **\$167,500**, while estimated **average** household income was **\$211,000**



# GENDER



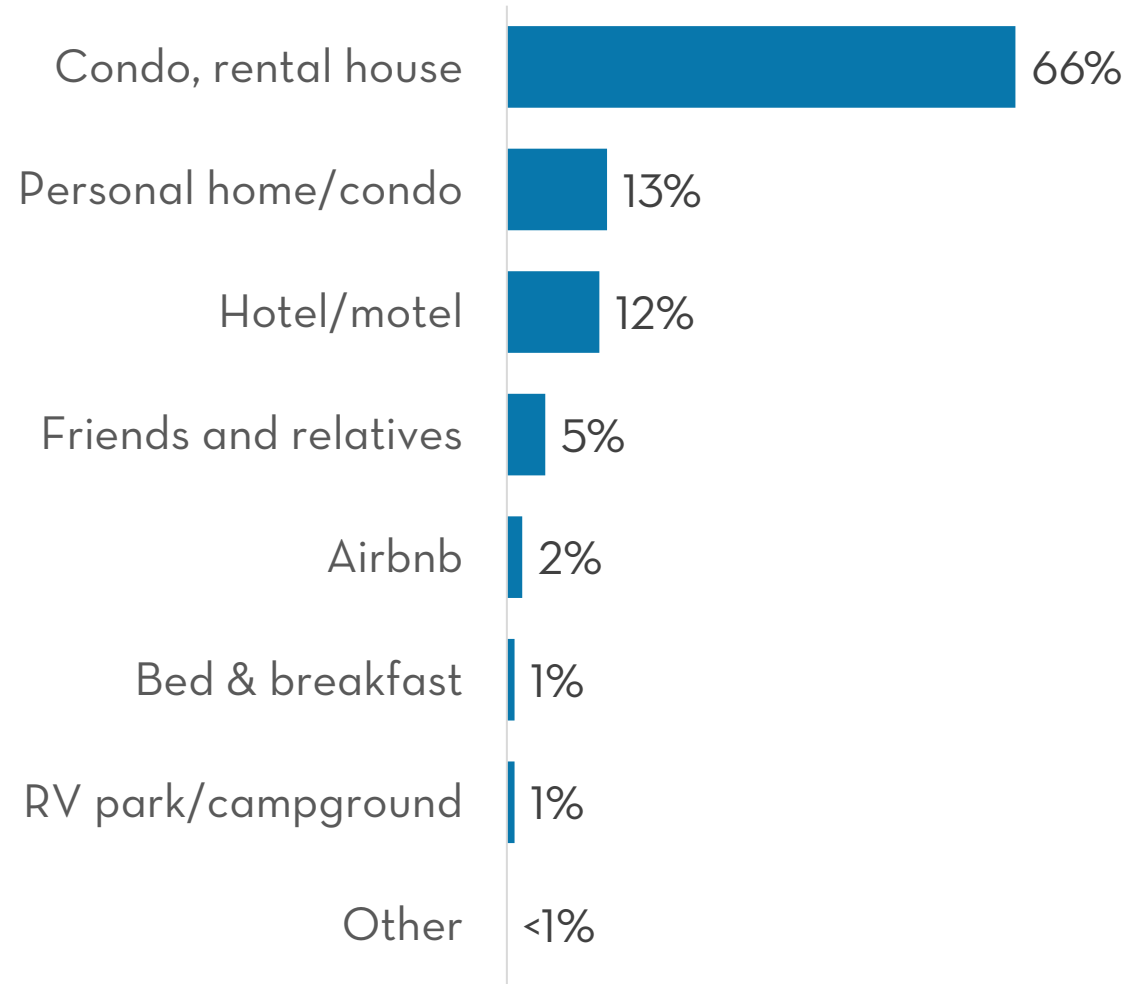
■ Female □ Male

Responses impacted by person more willing to be interviewed

# VISITOR JOURNEY: TRIP EXPERIENCE



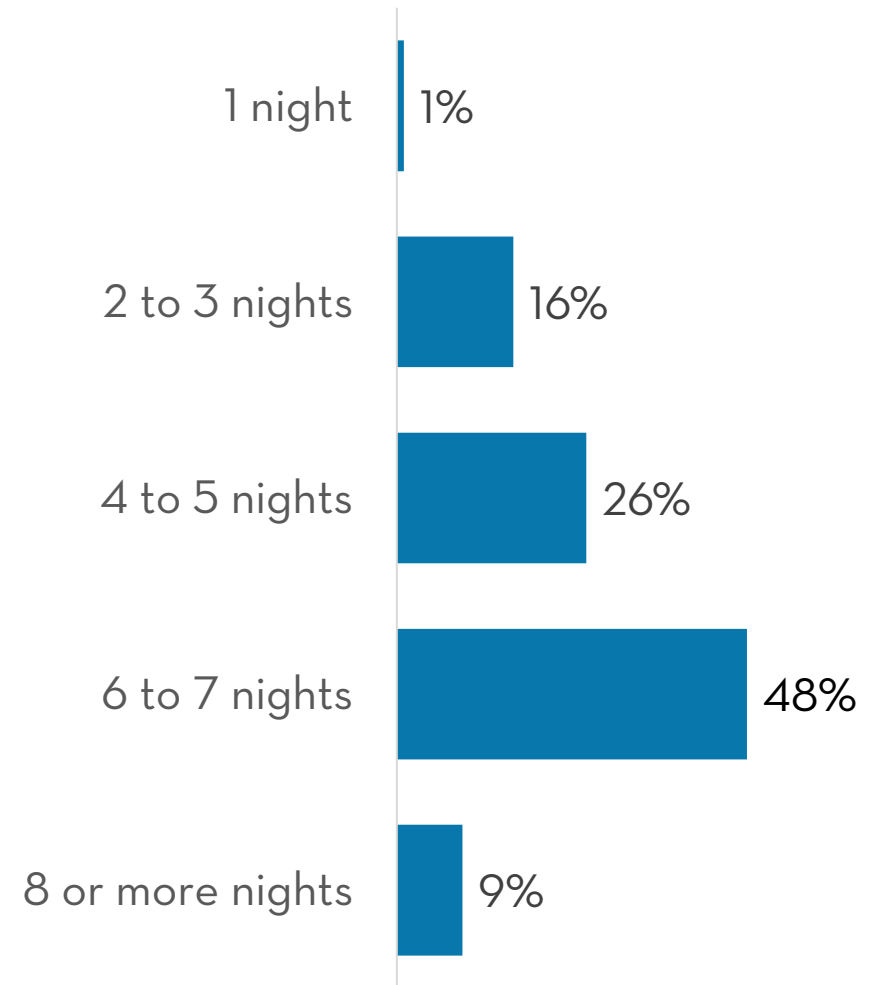
# VISITOR'S ACCOMMODATIONS



# LENGTH OF STAY



Summer visitors<sup>1</sup> spent an average of **5.2** nights in South Walton



<sup>1</sup> Visitors who stayed in South Walton up to 30 nights.

# NUMBER OF VISITS TO SOUTH WALTON

**12%** of Summer visitors were visiting for the first time

**35%** of Summer visitors have visited South Walton more than 10 times

That was my first time

2 - 3

4 - 5

6 - 10

11 - 20

21+

12%

18%

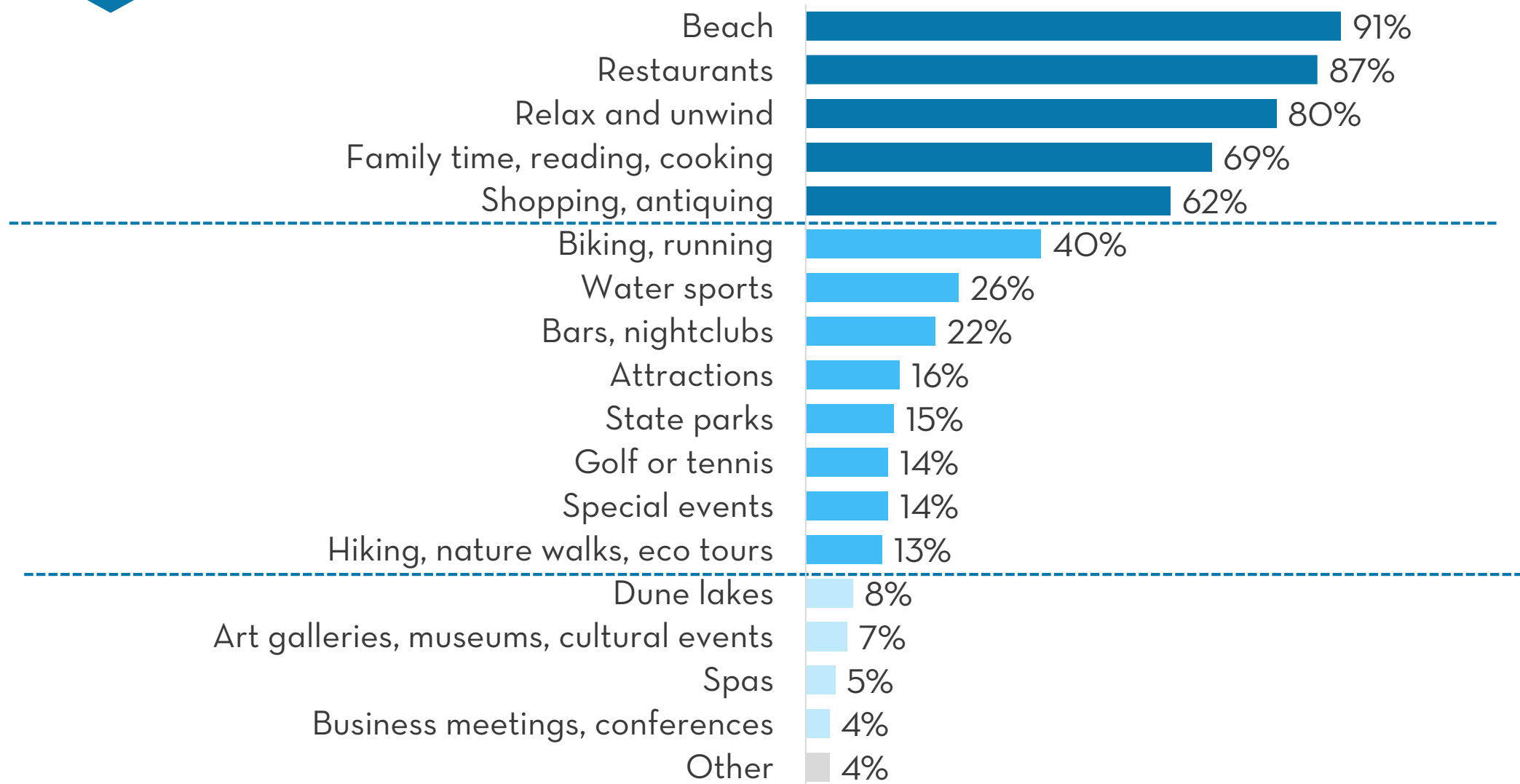
15%

20%

16%

19%

# VISITOR ACTIVITIES<sup>1</sup>

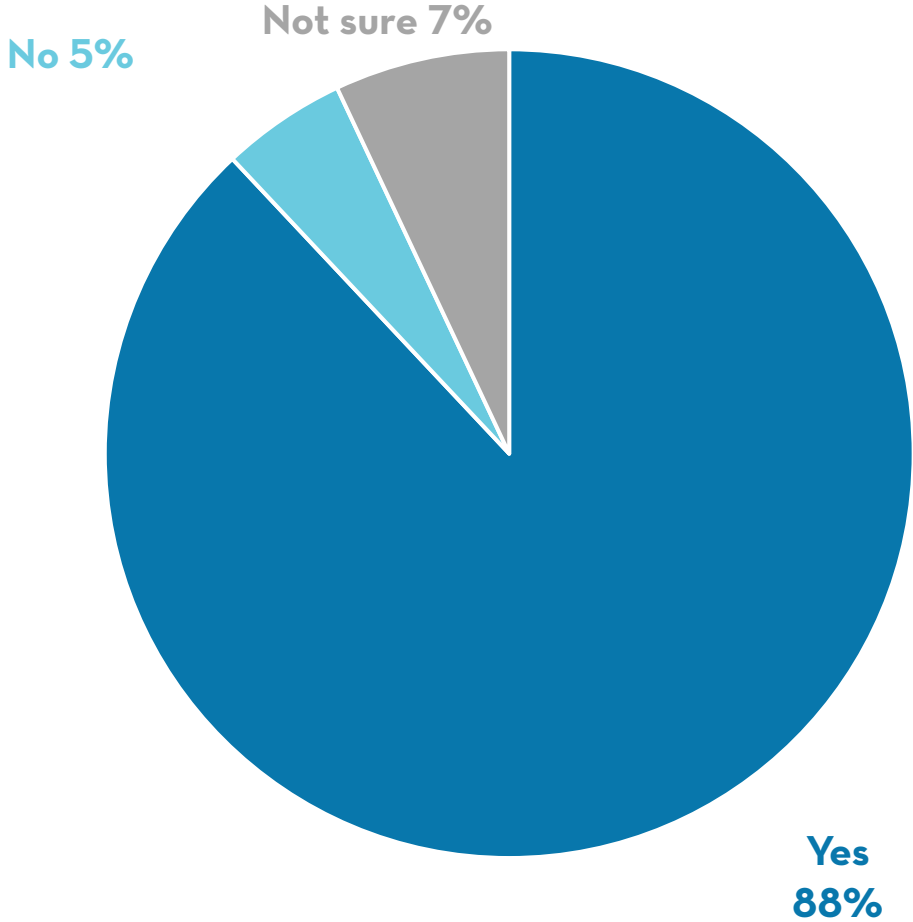


<sup>1</sup>Multiple responses permitted.

# BEACH SAFETY



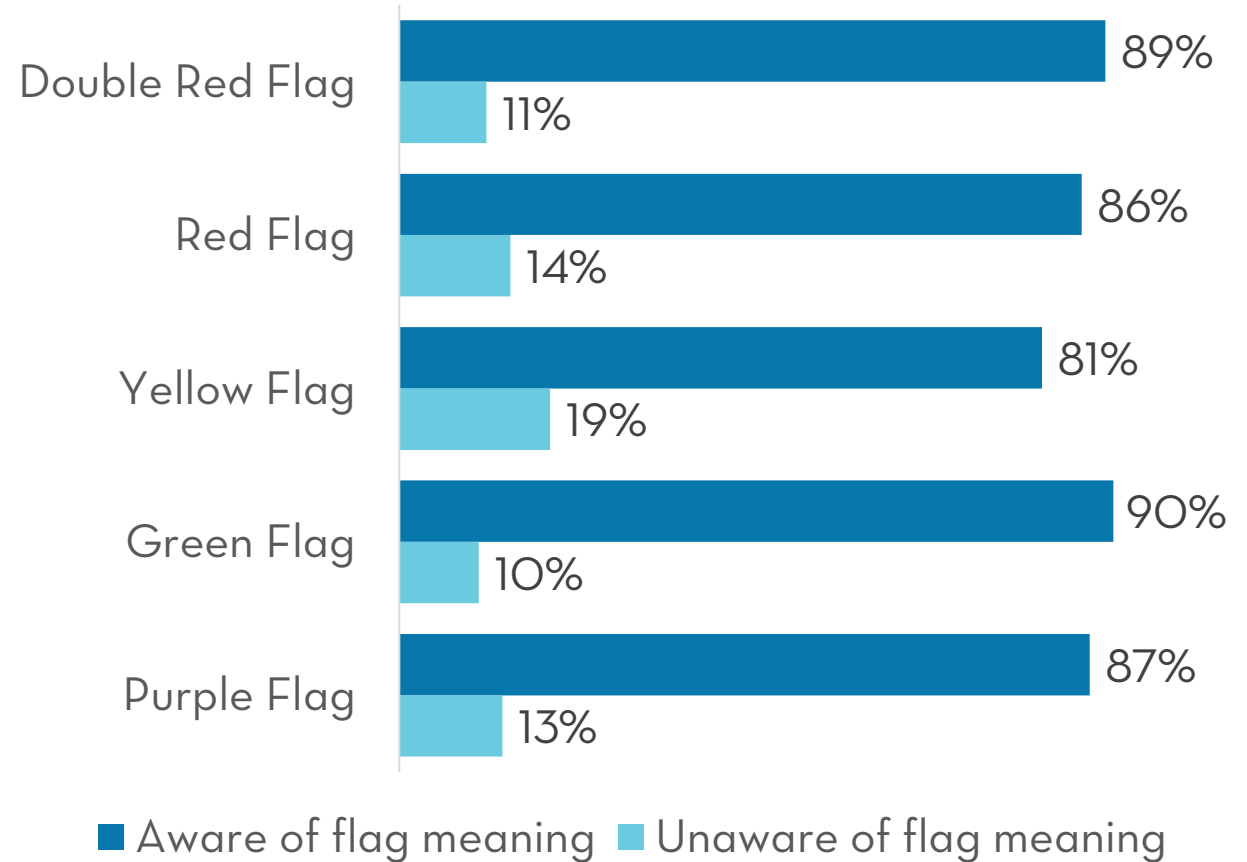
**88%** of Summer visitors know there are flags posted along the beaches to indicate how safe it is to go into the water



# BEACH FLAG AWARENESS

**Over 4 in 5** visitors are aware of the meaning of each flag color

**49%** of Summer visitors are aware that entering the Gulf during double red flag conditions can result in a \$500 fine and criminal charges



# TYPICAL SOUTH WALTON TRAVEL PARTY EXPENSES<sup>1</sup>

Visitor Metrics <sup>1</sup>	Average Daily Expenditure	Total Trip Expenditure
Accommodations	\$406	\$2,110
Restaurants	\$159	\$830
Groceries	\$77	\$400
Shopping	\$149	\$770
Entertainment	\$65	\$340
Transportation	\$64	\$330
Other	\$22	\$120
<b>Total</b>	<b>\$942</b>	<b>\$4,900</b>

<sup>1</sup>Visitors who stayed 30 nights or fewer. Includes day trippers.

# VISITOR JOURNEY: POST-TRIP EVALUATION



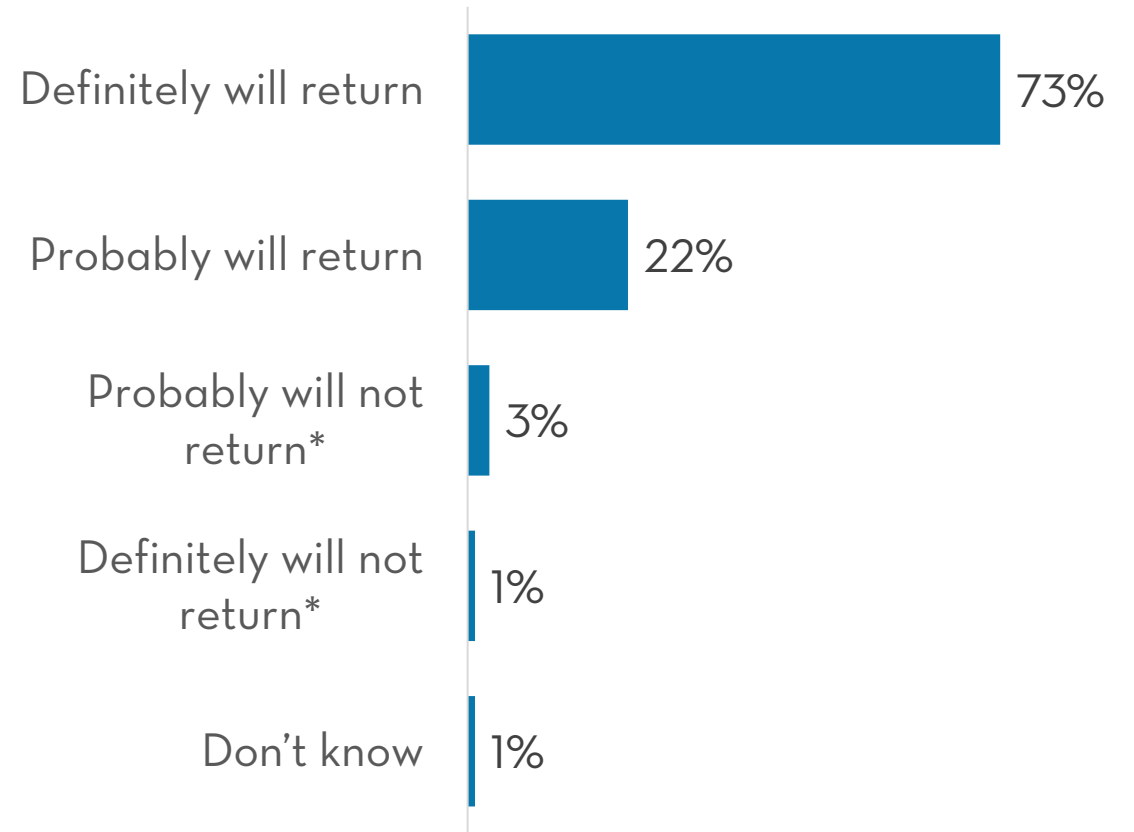
# SATISFACTION WITH SOUTH WALTON



Visitors gave South Walton a rating of **9.1**<sup>1</sup> as a place to vacation



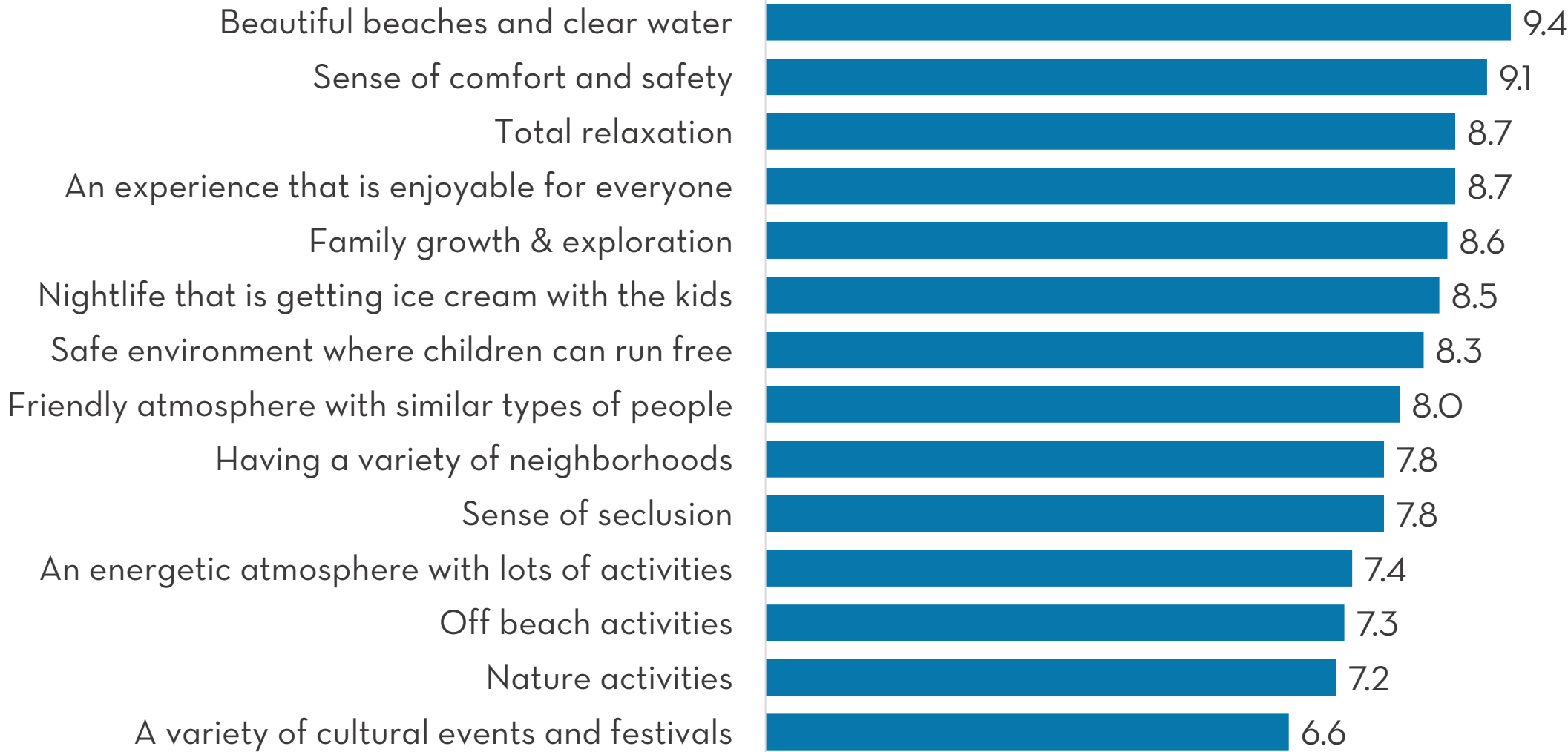
**73%** will definitely return to South Walton



<sup>1</sup>10 = Excellent; 1 = Poor

\* 4% of all visitors will not return to South Walton for the following reasons:  
1. Too crowded 2. Traffic was a problem and 3. Parking was a problem.

# RATING SOUTH WALTON<sup>1</sup>



<sup>1</sup> Rated on a scale from 1 to 10 where 1 is poor and 10 is excellent.

# AREA DESCRIPTIONS



*“Beautiful clean beaches. Crystal clear water. Fun for people of all ages.”*

*“Beautiful beaches, relaxing atmosphere, plenty of activities, pedestrian friendly, family friendly, safe.”*

*“I would tell my friend that they have the best beaches ever. The sand is like sugar. The place is so laid back and not your typical touristy place.”*

*“My favorite beach of all. Turquoise waters, powdery white sand, and a safe family atmosphere.”*

# AREA DESCRIPTIONS



*“The ultimate family getaway to the most beautiful beach in the world, with shopping, biking and a relaxed family atmosphere that is unmatched anywhere else I have been.”*

*“We go there every year, and always look forward to the next trip. Love the beautiful beaches. We go everywhere on golf carts and have so much fun!”*

*“South Walton is a great place for a family vacation!”*

*“We've been there over 30 times - we obviously like it a lot. Beautiful beaches. Relatively easy drive.”*

# AREA DESCRIPTIONS



*“Relaxing, lots of activity, beautiful atmosphere, great food, shopping opportunities, a place to truly unwind and separate from normal life.”*

*“Heaven on earth.”*

*“Fantastic. Love the beach and the vibe.”*

*“The Hamptons of the South.”*

# EMOTIONS ASSOCIATED WITH SOUTH WALTON



*"We love the summer air and the feeling of being close to family."*

*"We have found our slice of heaven here."*

*"Enchantment."*

*"Gratitude."*

*"I feel special. I love the beaches."*

*"Life's just better at the beach."*

*"My happy place."*

*"Nothing but happy feelings."*

*"We just get a family feeling like you do at Christmas sitting by the fire."*

# VISIT SOUTH WALTON

**Summer 2022 Visitor Tracking Study**  
June - August 2022

Downs & St. Germain Research  
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