



Visit South Walton

Visitor Tracking & ADR Study Summer 2018

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downs & st. germain
RESEARCH



Study Objectives

- Profile travel parties to South Walton
- Motivation for visiting
- Likelihood of returning
- Mode of transportation
- Importance of vacation attributes & rating of South Walton
- Daily expenditures & expenditures by category
- Trip planning information
- Use of South Walton Visitors Guide
- Noticed South Walton messaging
- Demographic profile of visitors

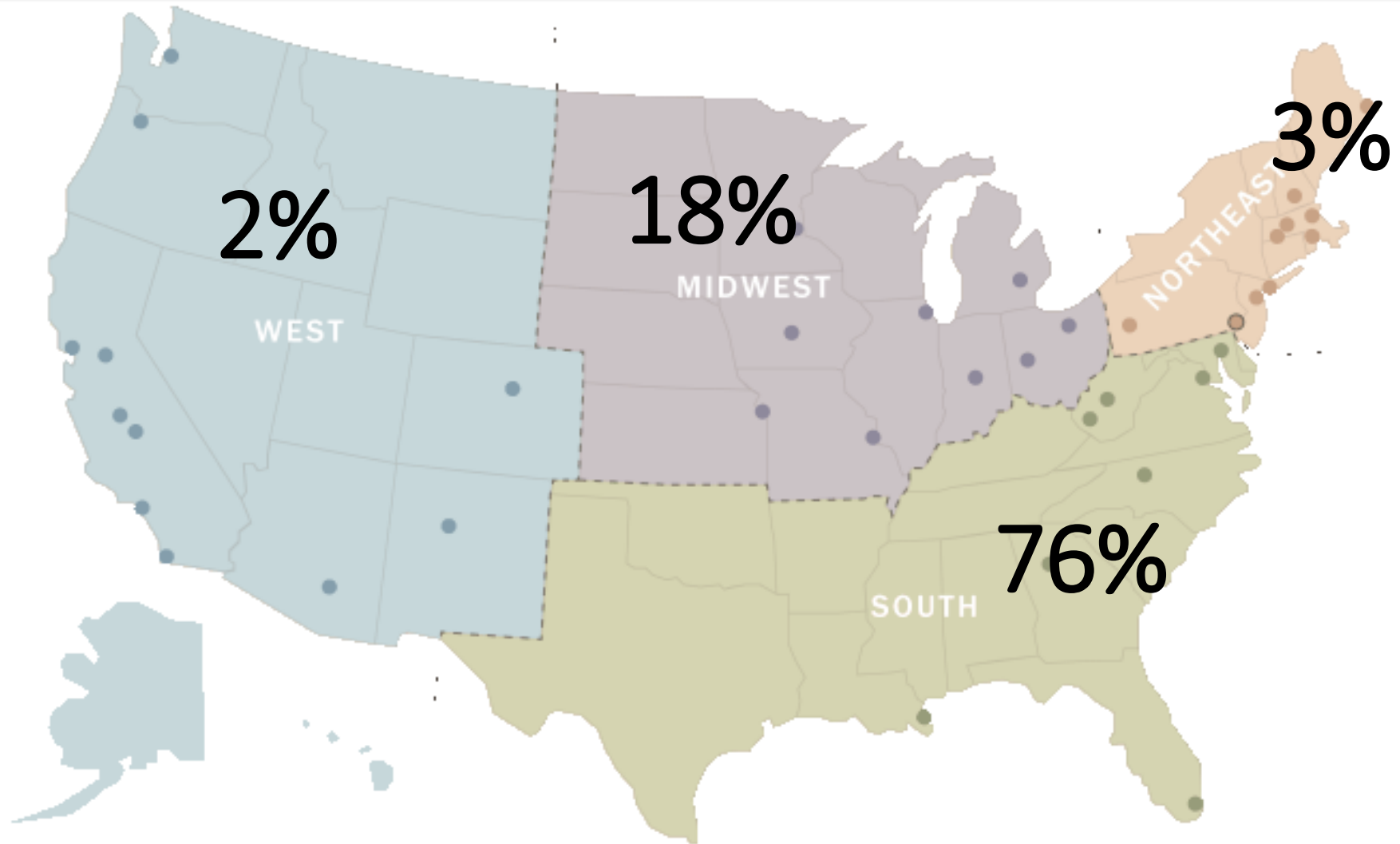
Methodology

- Internet & on-site surveys
- Sample Size – 1,275 completed interviews¹
- Target Individuals: Visitors to South Walton in June, July, and August 2018

¹Interviews 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. It should be noted that 350 interviews were conducted via face-to-face interviews along the beach and in public areas. This is a higher number than in summer 2017.

Executive Summary

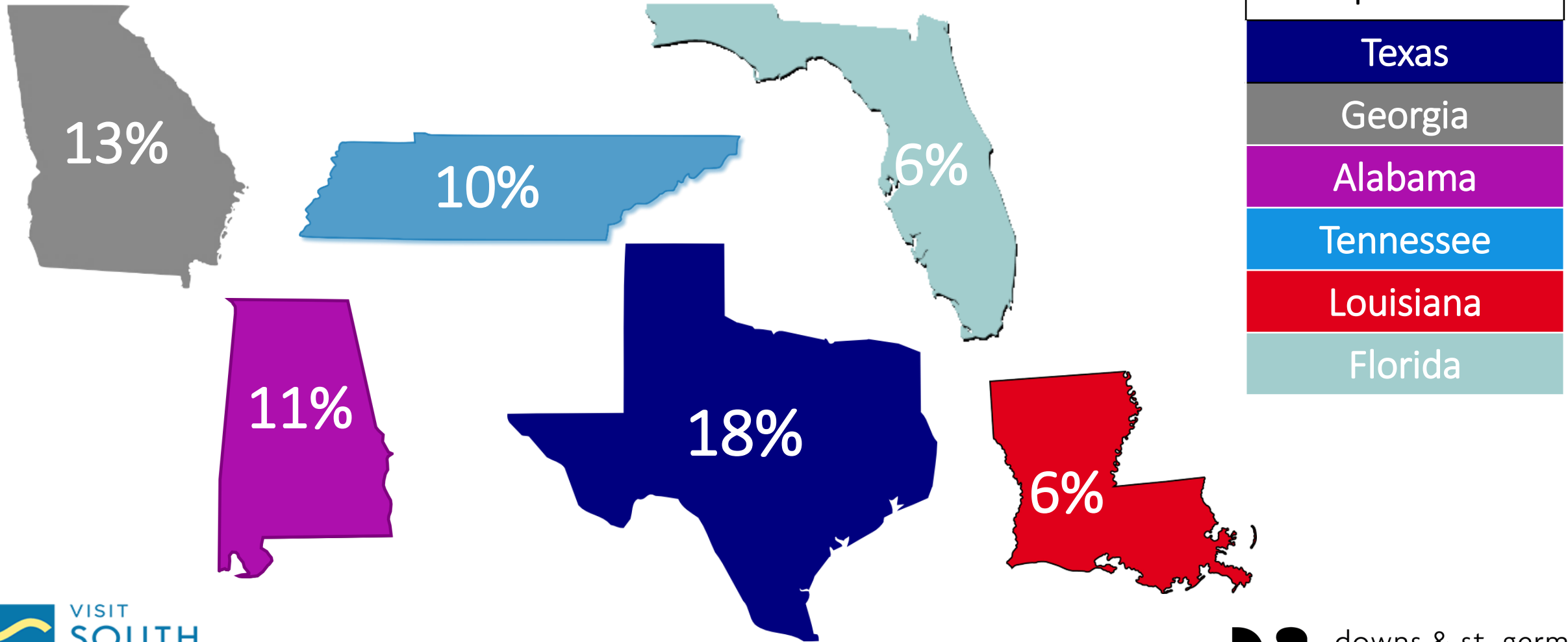
Origin of Visitors



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

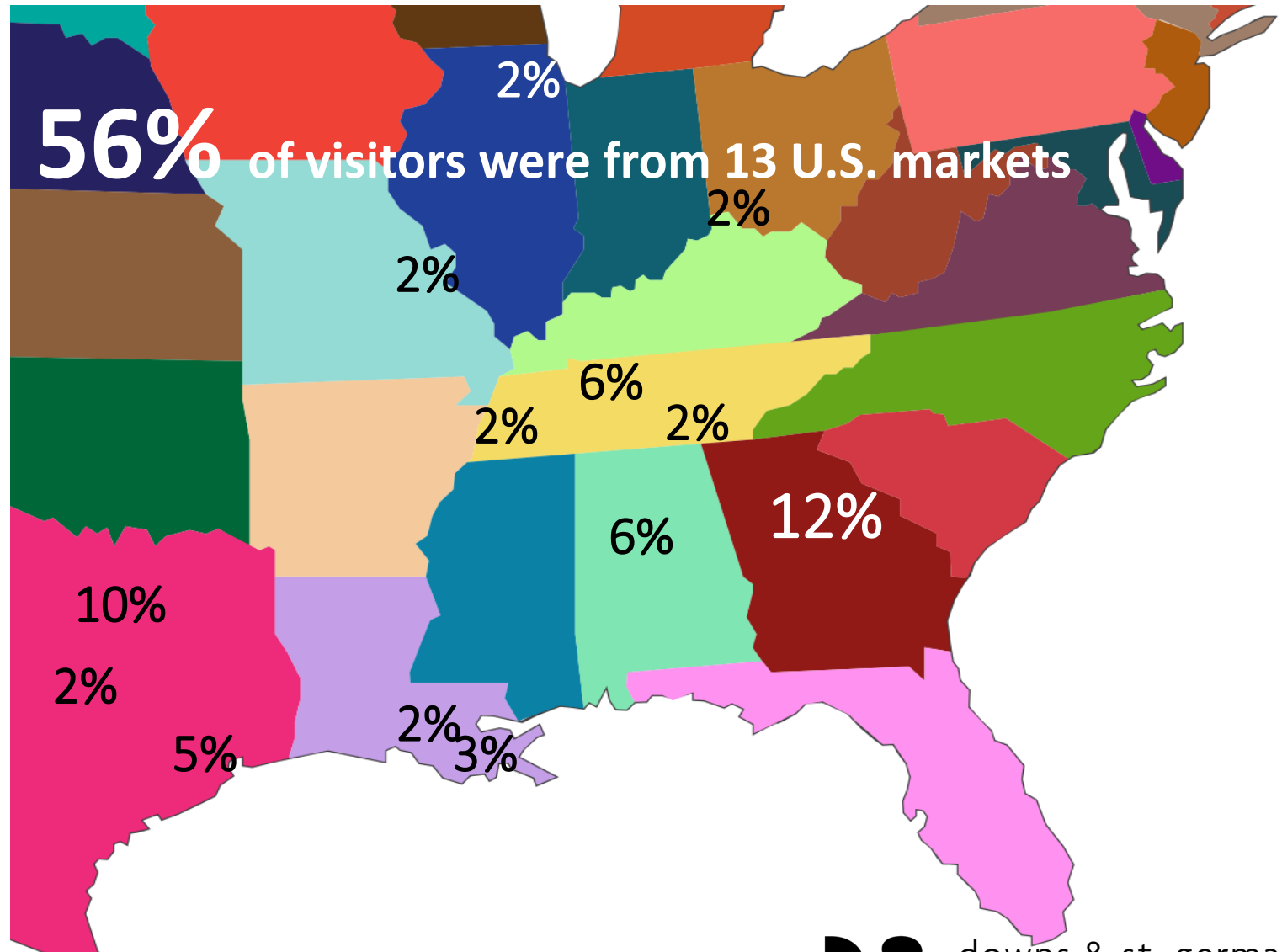
Origin of Visitors

- **64%** of visitors were from 6 states



Origin of Summer Visitors

Top Markets	% of Visitors
Atlanta	12%
Dallas - Ft. Worth	10%
Birmingham	6%
Nashville	6%
Houston	5%
New Orleans	3%
Memphis	2%
St. Louis	2%
Chattanooga	2%
Austin	2%
Baton Rouge	2%
Chicago	2%
Cincinnati	2%



Accommodations

76% - Condos, rental houses, etc.



9% - Personal condo, houses, etc.



6% - Friends & relatives



6% - Hotels

Travel Parties

The typical visitor traveled in a party composed of **6.2** people



70% traveled with at least one person under the age of 20 in their travel party



Length of stay

- Visitors spent **6.2¹** nights in South Walton



¹Visitors who stayed 30 or fewer nights.

Profile – Typical Vacationer¹

→The typical Vacationer¹ Visitor:

→Is 51 years old

→Has a median household income of \$178,600

→Is female (60%)

→72% travel with children

→82% drove

→Is from:

→ Southeast (74%)

→ Midwest (20%)

→ Northeast (3%)

→ West (2%)

→ International (1%)



¹Travel parties who stayed 1-10 nights.

Profile – Typical Long-Term¹ Visitor

→The typical Long-Term¹ Visitor:

→Is 55 years old

→Has a median household income of \$173,900

→Is male (53%)

→57% did not travel with children

→82% drove

→Is from:

→Southeast (77%)

→Midwest (16%)

→Northeast (4%)

→West (4%)

¹Travel parties who stayed more than 10 nights.

Profile – Typical Day Tripper

→ The typical Day Trip Visitor:

→ Is 46 years old

→ Has a median household income of
\$178,300

→ Is female (51%)

→ 55% traveled with children

→ 100% drove to South Walton

→ Is from:

→ Florida (90%)

→ Southeast – not including FL (10%)



Top Booking Accommodations

- Visitors used the following to book their Summer trip:

Vacation Rental Company (64%)



360 BLUE®



Hotel/condo (18%)



EMBASSY SUITES
HOTELS®



Residence
Inn®
Marriott®

VRBO, Homeaway (13%)



VacationRentals.com™
Part of the HomeAway Family

Transportation

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

47%

Northwest Florida Beaches
International Airport



31%

Destin-Ft. Walton Beach Airport



1%

Pensacola International
Airport



Visitation

- 17% were first time visitors
- 37% had visited more than 10 times



Visitor satisfaction

- Visitors gave South Walton a rating of **9.2¹** as a place to vacation
- **94%** 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 crowded (2%) ; 2. traffic was a problem (1%); 3. too expensive (1%); 4. parking was a problem (1%)

Top reasons for visit¹

Family vacation (84%)



To relax and unwind (51%)



Annual routine (23%)



Special occasion (8%)



¹Multiple responses permitted.

Top activities during visit¹

Beach (98%)



Restaurants (93%)



Relax and unwind (90%)



Family time, reading, cooking (81%)



Shopping, antiques (73%)



Biking, running, etc. (49%)



Water Sports (40%)



Attractions (25%)



¹Multiple responses permitted.

Visitor spending

- Visitors spent **\$944** a day
- Visitors spent **\$5,853** on their trip



Spending per day was \$956 in 2017, and \$6,024 per trip.
The average stay in 2017 was 6.3 nights, vs. 6.2 nights in 2018.

Trip planning

- **1 in 3** visitors plan a Summer South Walton vacation 6 months out or more
- Top trip planning sources:

Friends, family



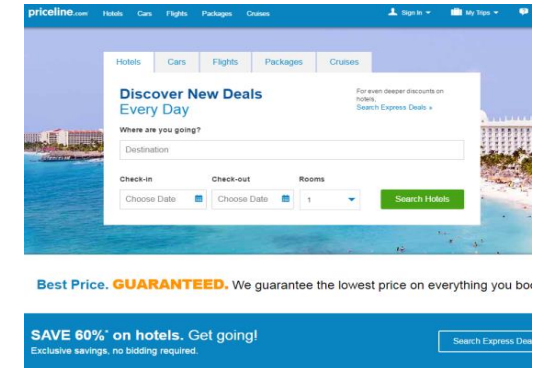
Search on Google, Yahoo, etc.



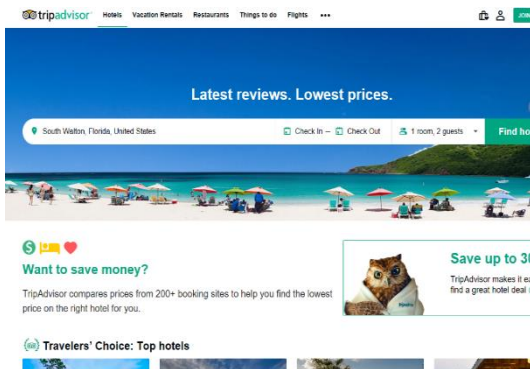
Website for 1 of the 16 beach areas in South Walton



Travel websites



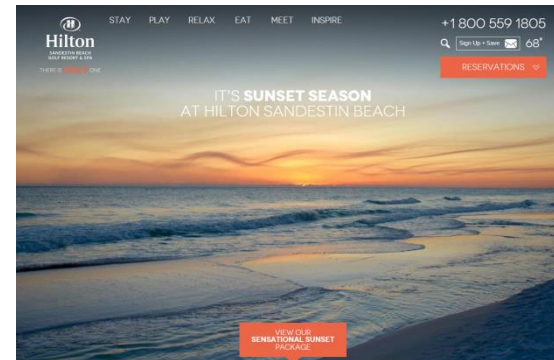
Online travel reviews and blogs



VisitSouthWalton.com



Hotel websites



Brochures/travel guide/visitors guide



Visitors guide

- **20%** of visitors viewed the South Walton Visitors Guide before going to South Walton
- Visitors Guide received a rating of **7.4 out of 10¹**

¹10 = Extremely useful; 1 = Not at all useful



Other destinations

- When planning their trip to South Walton:
 - **49%** of visitors considered going to only 1 of the 16 beach communities
 - **38%** considered going to another South Walton beach community



South Walton Promotions

- 29% of Summer visitors have recently seen, read or heard advertising, promotions or travel stories about South Walton
- Top sources of recall:

Ad on a website



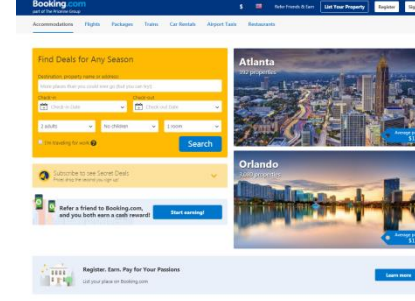
Television



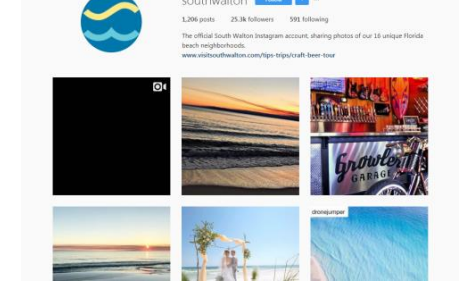
Magazine Ad



Rental agency/
booking websites



VSW social media accounts



Other social
media accounts



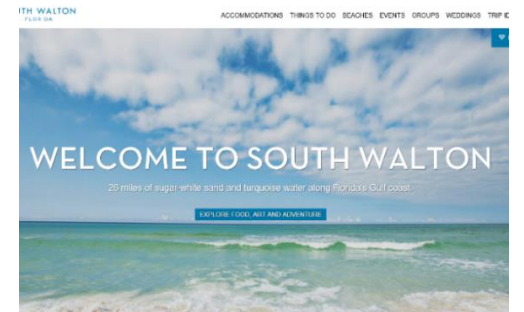
Magazine article



Online article



VisitSouthWalton.com



Perceptions of South Walton



Beautiful beaches

“Beautiful with wonderful beaches and water in an upscale environment.”



Family friendly

“South Walton is an ideal family beach destination. We love it because of the slow, neighborhood-like setting, biking, trees, and beautiful beaches.”



Relaxing

“South Walton is a wonderful vacation destination. If you want to relax and you enjoy vacationing in the summer and being outdoors, it is hands down THE BEST place to go!”



Great place to visit

“Best vacation! Beautiful beach with clear water and white sand! Loved the family friendly vibe. Loved how it was local restaurants. Awesome time!”

Emotions and feelings associated with South Walton¹



¹Coded verbatim responses; multiple responses permitted.

Demographics

- The typical South Walton Summer visitor:
 - **51** years old
 - **Female (59%)**
 - **Median** household income of **\$177,800**
 - **Average** household income of **\$232,300**
 - From the **Southeast (76%)**



Yearly Comparisons

Visitor Profile – Summer 2017 vs. 2018

Visitor Metrics	Summer 2017	Summer 2018
Travel party	6.7	6.2
Kids <20	79%	70%
Median age	51	51
Estimated median household income	\$153,100	\$177,800
Stayed in condo/rental house	76%	76%
Drove	85%	83%
Nights spent ²	6.3	6.2
Direct expenditures (entire trip) ²	\$6,024	\$5,853
1 st time visitor	20%	17%
10+ visits to South Walton	28%	37%

¹Estimated average household income = \$232,300.

²Visitors who stayed in paid accommodations for up to 30 nights.

Visitor Profile – Summer 2017 vs. 2018

Top Origin States	Summer 2017	Summer 2018
Texas	18%	18%
Georgia	12%	13%
Alabama	11%	11%
Tennessee	11%	10%
Louisiana	8%	6%
Florida	2%	6%
Origins - Regions	Summer 2017	Summer 2018
Southeast	72%	76%
Northeast	4%	3%
West	2%	2%
Midwest	21%	18%
International	1%	1%

Visitor Profile – Summer 2017 vs. 2018

Visitor Activities	Summer 2017	Summer 2018
Beach	95%	98%
Restaurants	93%	93%
Relax and unwind	85%	90%
Family time, reading, cooking, etc.	80%	81%
Shopping, antiquing	73%	73%
Biking, running, etc.	49%	49%
Water sports such as boating, kayaking, SUP	38%	40%
Attractions	24%	25%
Bars, nightclubs	23%	24%
Hiking, nature walks, bird watching, eco tours	11%	16%
State parks	12%	14%
Golf or tennis	14%	13%
Special events	13%	12%
Dune Lakes	7%	9%
Art galleries, museums, cultural events	8%	9%

Visitor Profile – Summer 2017 vs. 2018

Visitor Metrics	Summer 2017	Summer 2018
Will return to South Walton	96%	94%
Rating for overall experience ¹	9.2	9.2
Viewed Visitors Guide	22%	20% ²
Planned trip	6 months or more out	6 months or more out
Used VisitSouthWalton.com	29%	18%
Used 1 of 16 beaches' websites	45%	34%
Use the term "South Walton"	19%	19%

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

²19% used the online version & 1% used the print version.

Tourism Metrics – Summer 2017 vs. 2018

An increase in active units from 12,391 in August 2017 to 13,290 in August 2018, kept occupancy and ADR down slightly, although room nights were up a healthy 8.1% because of the increased inventory.

Numbers of visitors were up 6.4% despite travel party sizes being slightly smaller and people staying slightly fewer nights.

Direct spending was up less (4.6%) than numbers of visitors (6.4%) since people stayed slightly fewer nights.

Property Statistics	Summer 2017	Summer 2018	% Change
Room nights	910,800 ¹	984,300 ¹	+8.1%
Total visitors	1,917,900	2,040,600	+6.4%
TDT collections	\$11,961,636	\$13,415,176	+12.2%
Direct spending	\$1,184,619,200	\$1,239,598,200	+4.6%
Economic impact	\$1,753,236,400	\$1,834,605,300	+4.6%
Occupancy	80.5%	80.1%	-0.5%
Room rates	\$388.35	\$381.21	-1.8%
RevPAR	\$312.62	\$305.31	-2.3%

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

¹Slight adjustments were made to 2017 data based on updated figures from the Walton County Tax Collector.

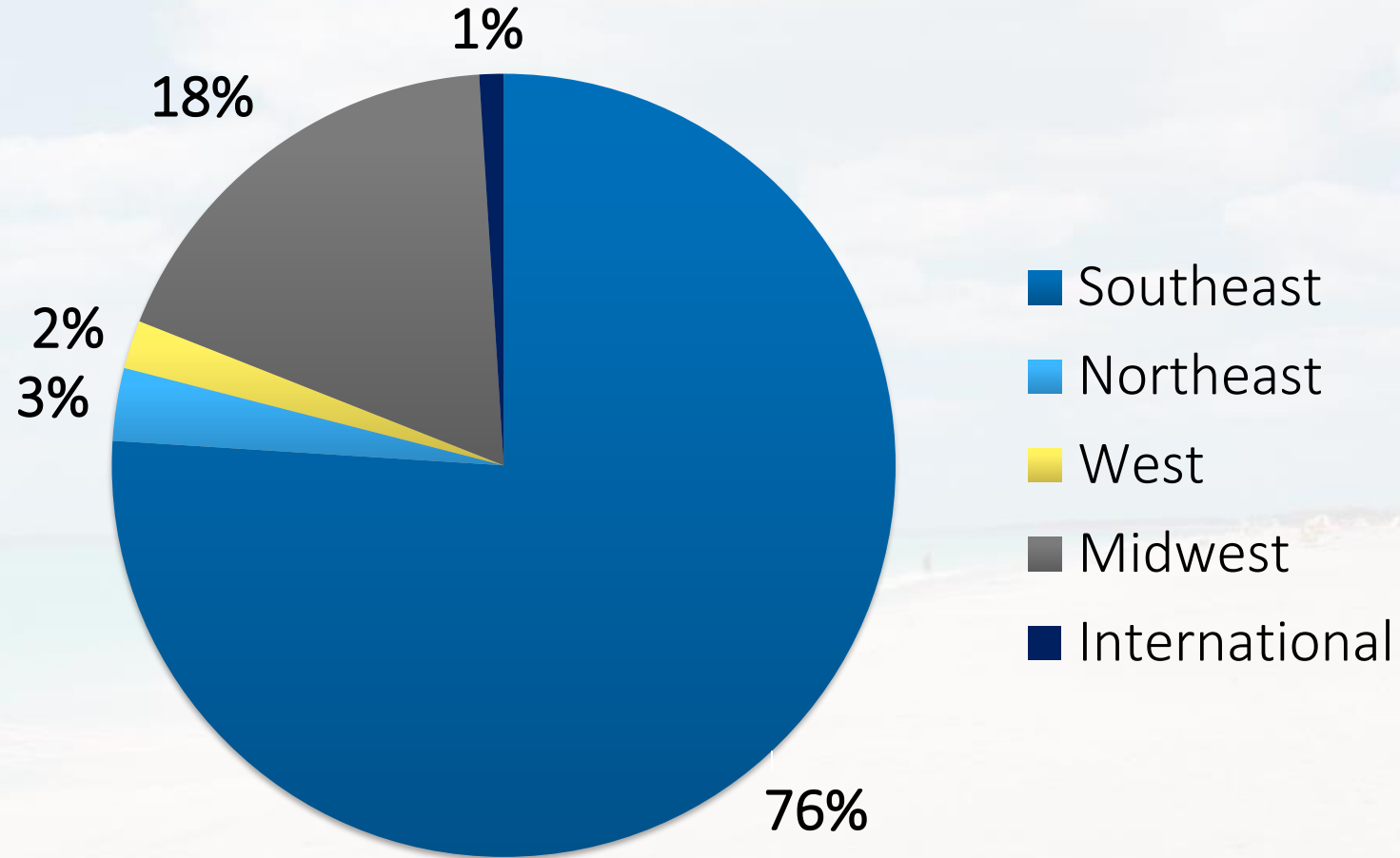
Detailed Findings

Typical South Walton Visitor

- Travel party = **6.2** people
 - **70%** traveled with at least one person under the age of 20 in their travel party
- Was **51** years old
- Was female (**59%**)
- Had a median household income of **\$177,800**
- Was from the **Southeast (76%)**
- Stayed in a **condo or rental house (76%)**

Origin of Summer Visitors

Top Origin Markets	% of Visitors
Atlanta	12%
Dallas-Ft. Worth	10%
Birmingham	6%
Nashville	6%
Houston	5%
New Orleans	3%
St. Louis ¹	2%
Chattanooga	2%
Austin	2%
Memphis	2%
Chicago	2%
Cincinnati	2%
Baton Rouge	2%
Panama City-Destin	2%
Pensacola-Mobile	2%
Knoxville	1%
Washington DC-Baltimore	1%
Little Rock	1%
Charlotte	1%
Jacksonville	1%
Huntsville	1%



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

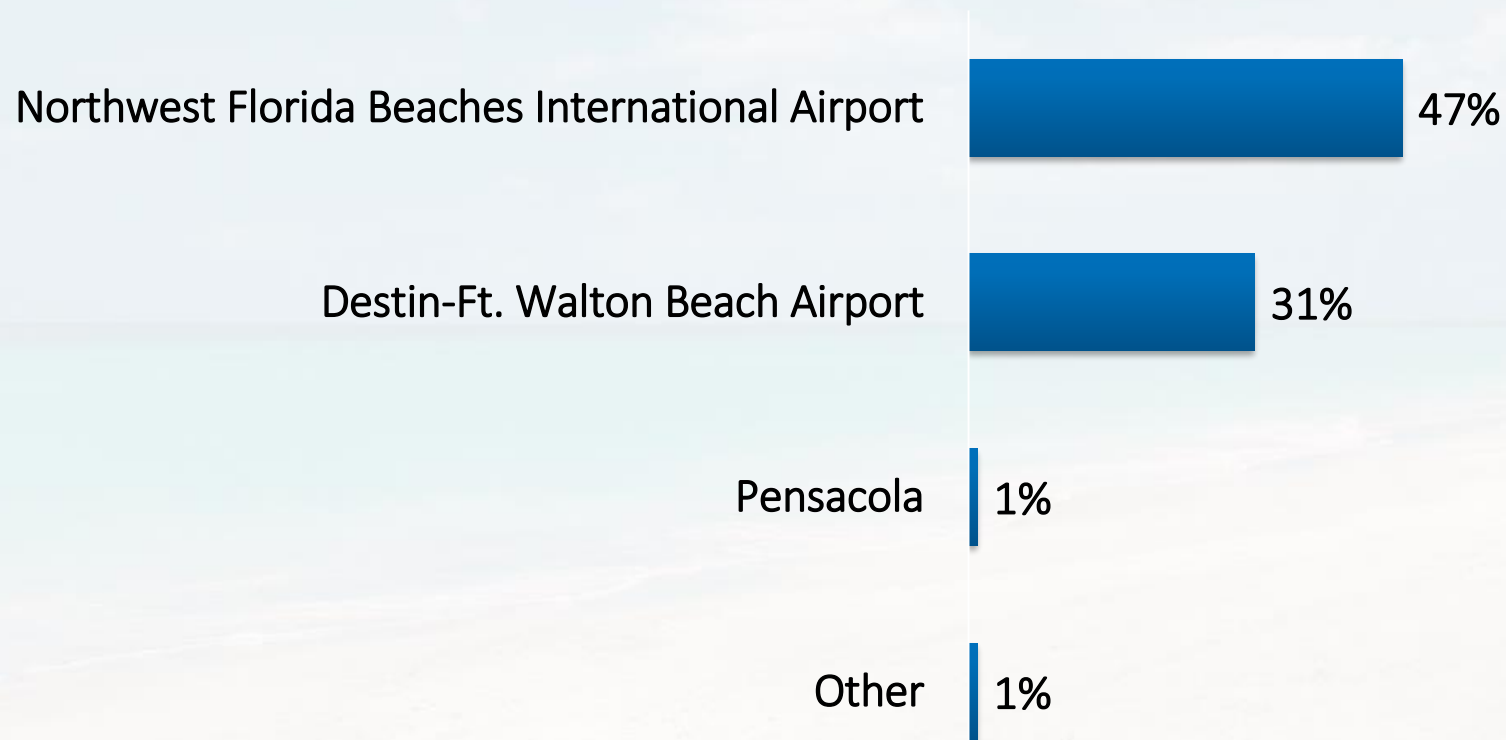
Origin of Summer Visitors

- **84%** of Summer visitors live in **12** states

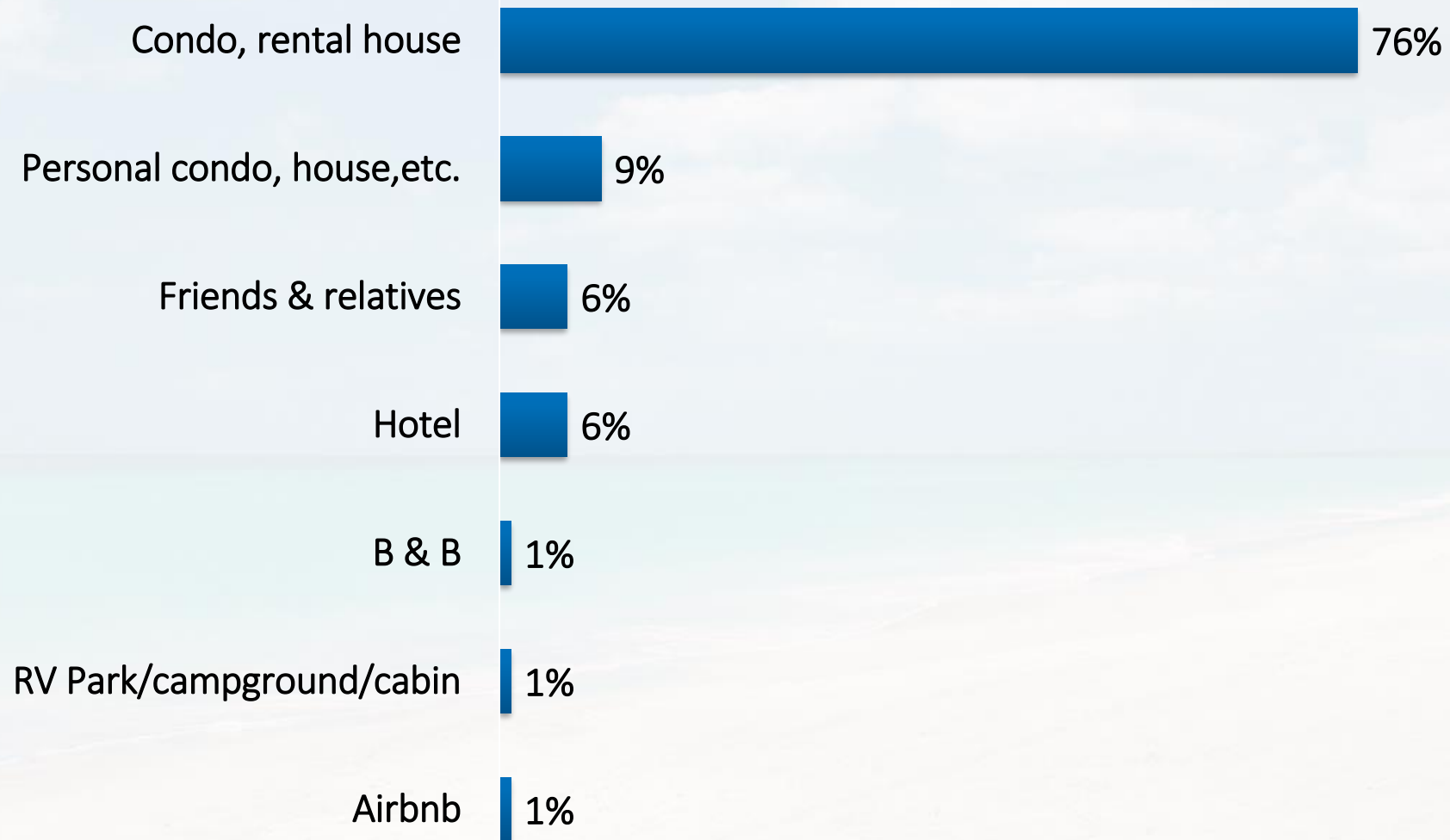
Texas	18%
Georgia	13%
Alabama	11%
Tennessee	10%
Louisiana	6%
Florida	6%
Kentucky	4%
Arkansas	4%
Ohio	3%
Illinois	3%
Mississippi	3%
Missouri	3%

South Walton Visitor Transportation

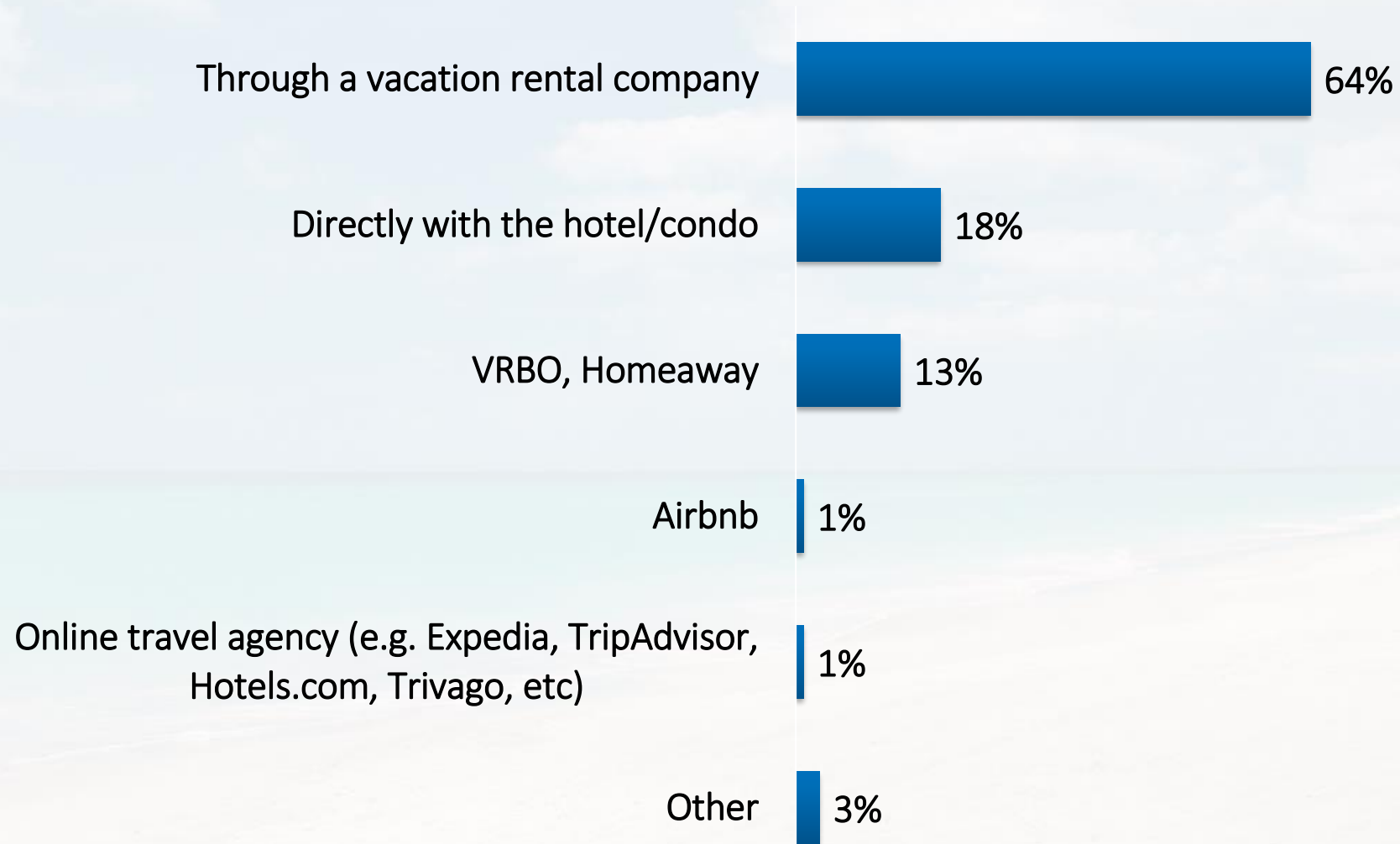
- **Drove** to South Walton (**83%**)
- **33%** of those who drove were aware that there were direct flights from their city to the South Walton area
- **17%** who **flew** used the following airports:



Visitors' Accommodations

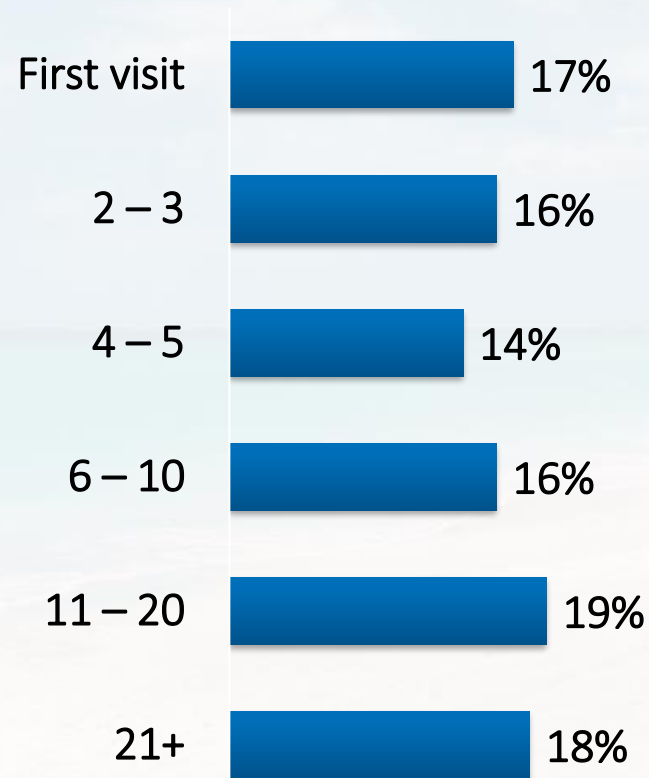


Booking Accommodations



Typical South Walton visitor

- Spent **6.2 nights¹** in South Walton
- **17%** were **first time** visitors
- **37%** had visited more than 10 times



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

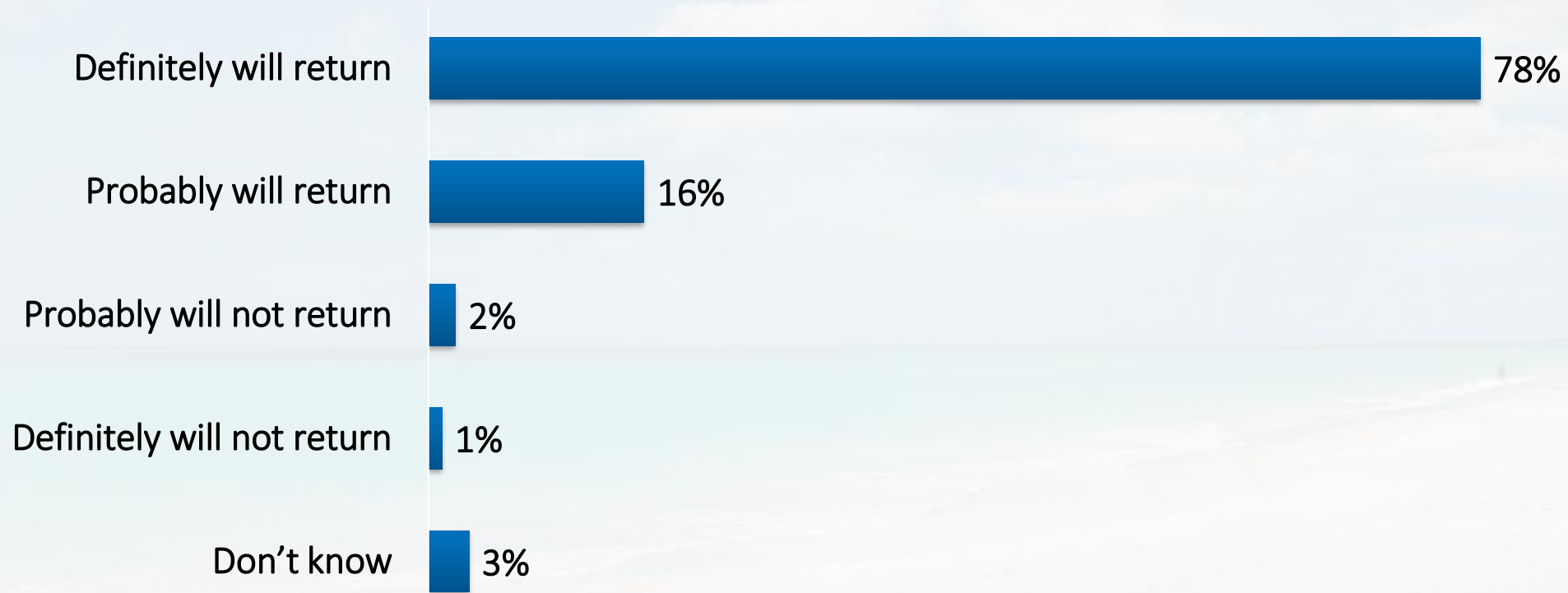
Reasons for visiting¹



¹Multiple responses permitted.

Satisfaction with South Walton

- Gave South Walton a rating of **9.2¹** as a place to vacation
- **94%** will return to South Walton²



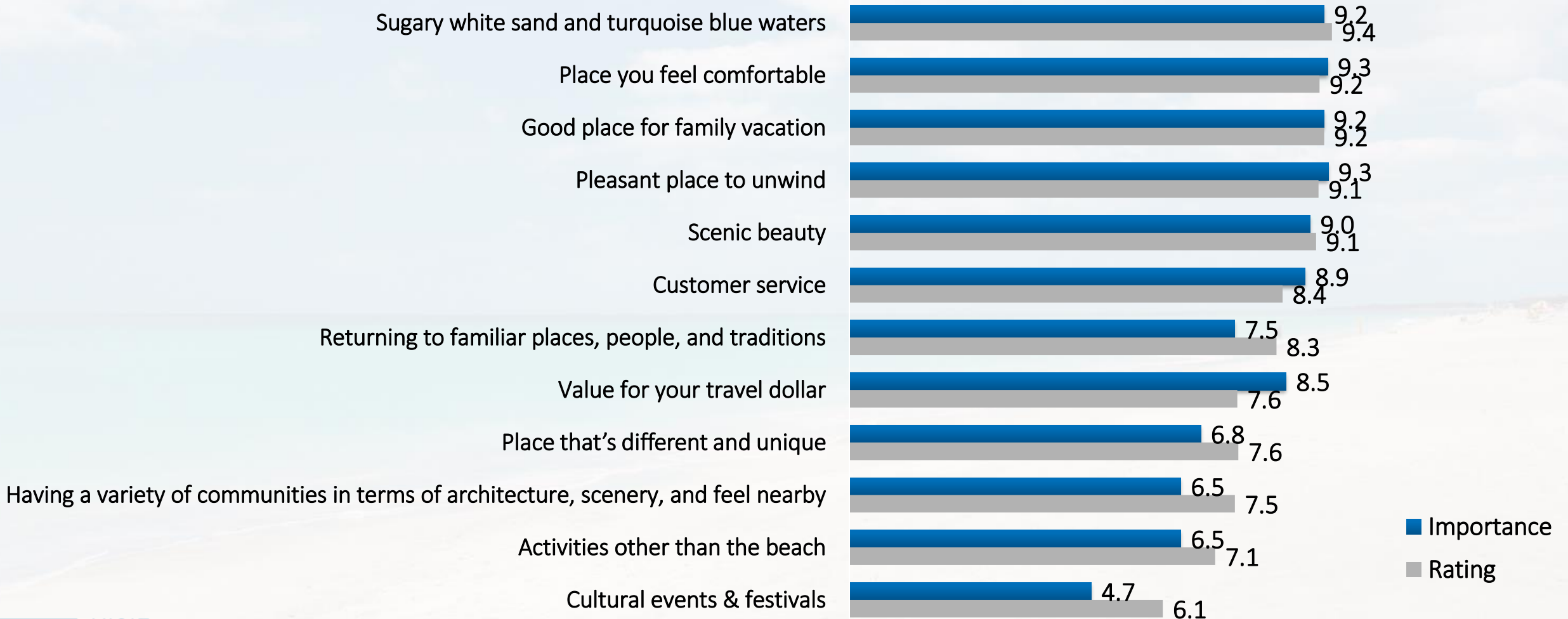
¹10 = Excellent; 1 = Poor

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

1. Too crowded,
2. traffic was a problem,
3. too expensive,
4. parking was a problem,
- & 5. customary use of beaches.

South Walton Attributes: Gap Analysis

Importance of attributes when choosing destinations vs. **ratings** for South Walton



Typical South Walton travel party expenses

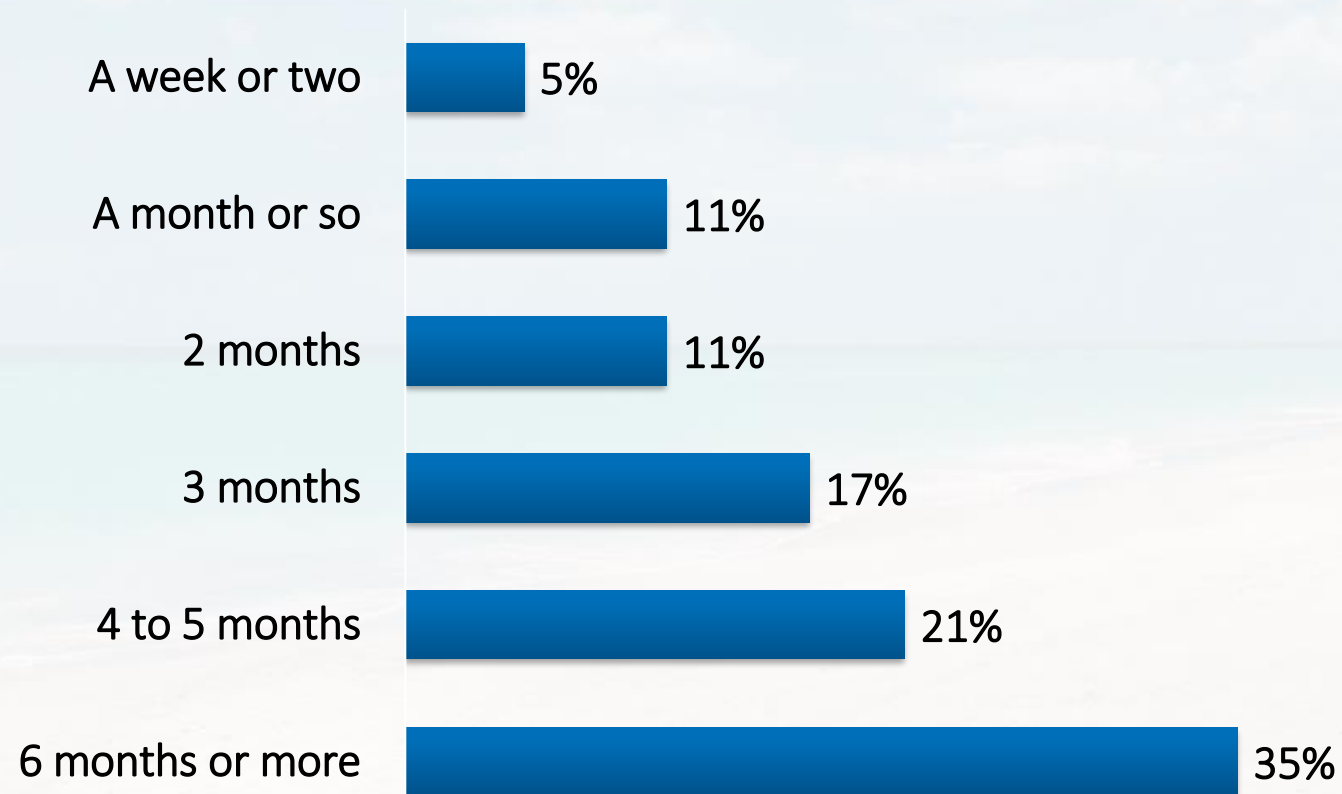
- Spent **\$944** a day
- Spent **\$5,853** on their trip: **-2.9%** compared to 2017, primarily because stays were shorter.

	Average Daily Expenditure	Total Trip Expenditure
Accommodations	\$455 ¹	\$2,821
Restaurants	\$152	\$942
Groceries	\$71	\$440
Shopping	\$109	\$676
Entertainment	\$62	\$384
Transportation	\$59	\$366
Other	\$36	\$222
Total	\$944	\$5,853

¹This 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.

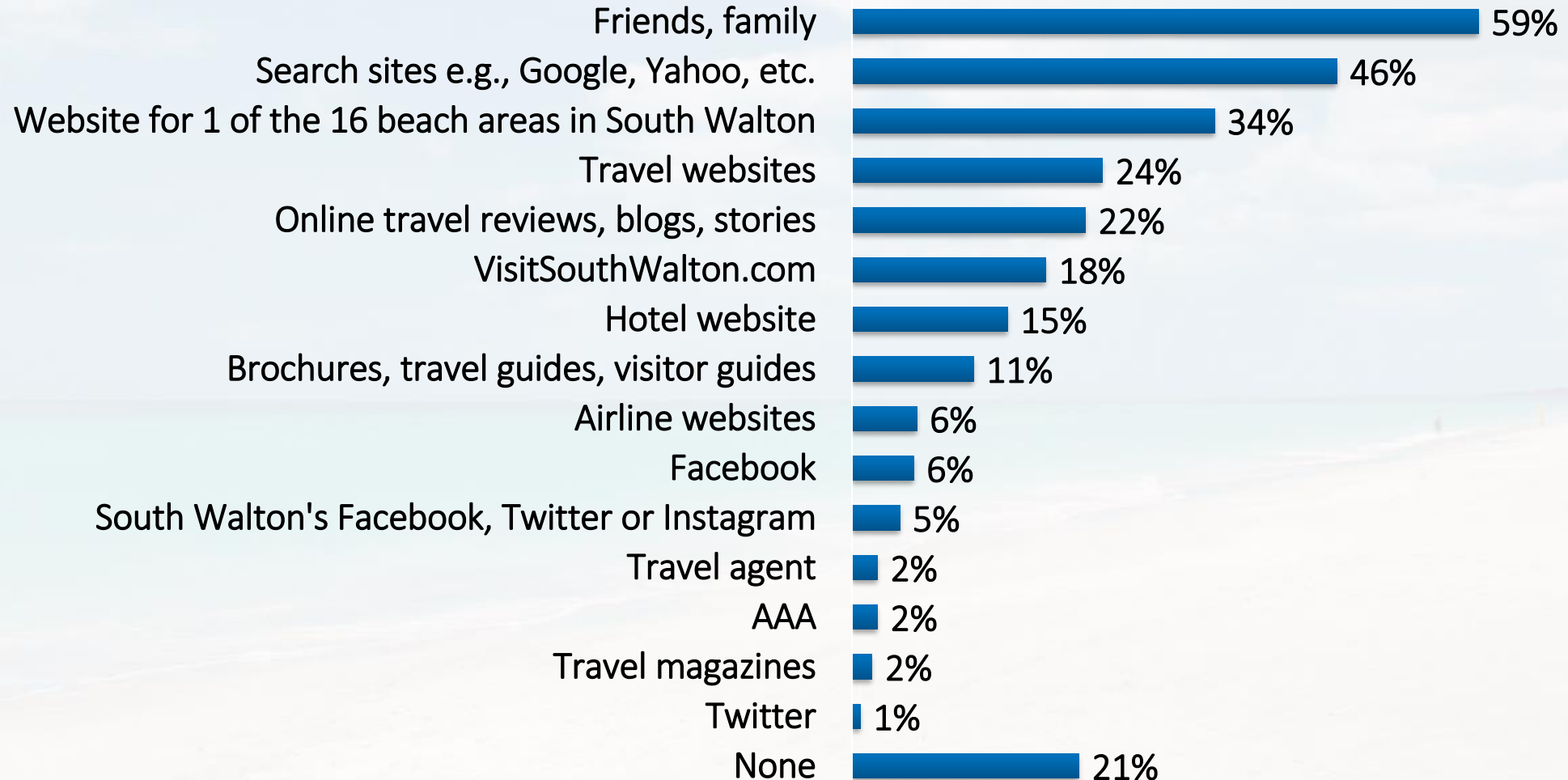
Planning cycle

- Over **1 in 3** visitors plans a Summer South Walton vacation 6 months out or more
- Relatively few visitors to South Walton have a short (a month or less) planning cycle



Planning sources

- Visitors use the following sources to plan their trips to South Walton¹:



¹Multiple responses permitted.

Typical South Walton visitor

- **20%** of visitors viewed a South Walton Visitors Guide before going to South Walton
 - 1% requested a print version
 - 19% viewed the online version
- Visitors Guide received a rating of **7.4 out of 10¹**

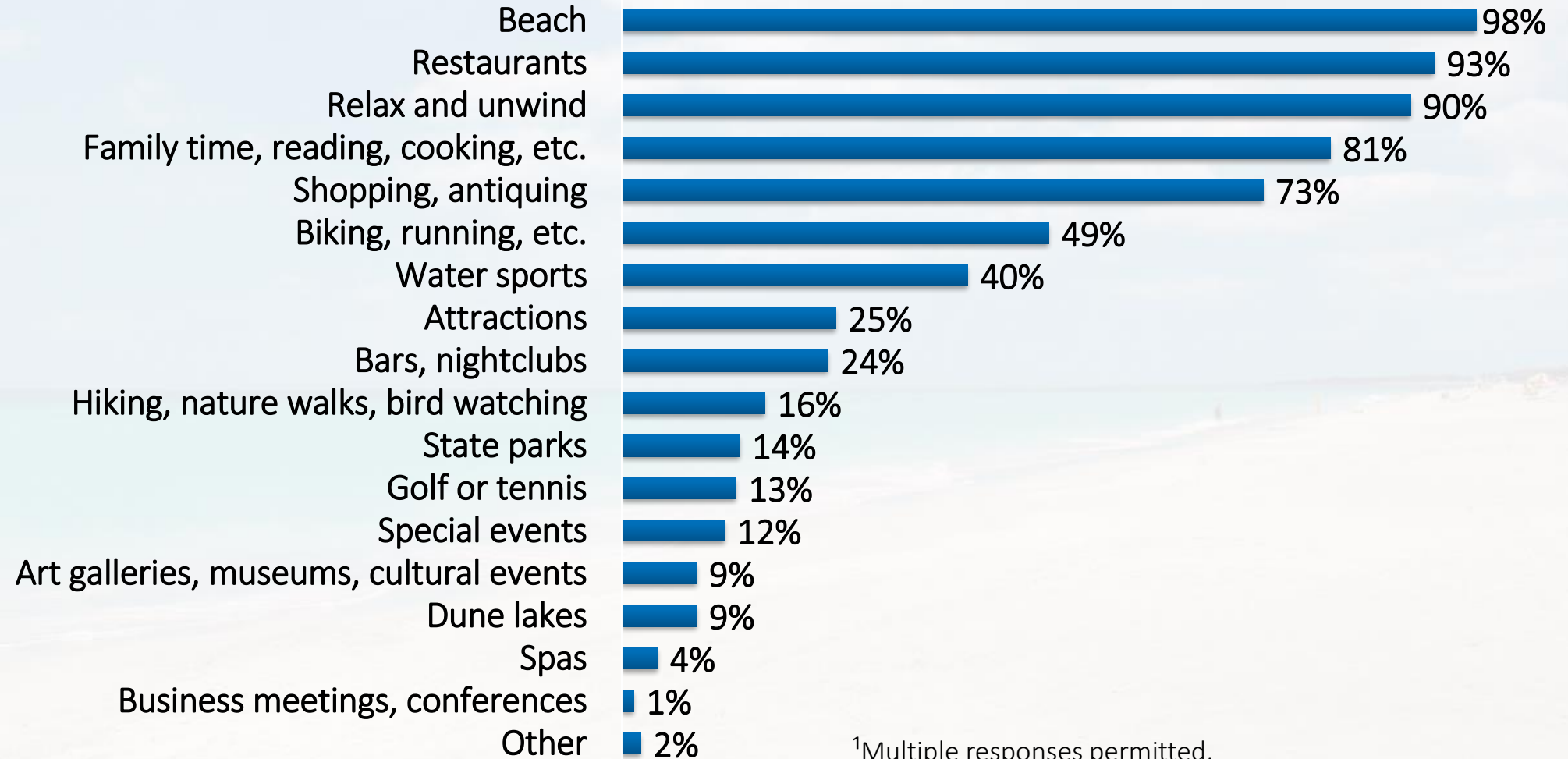
¹Rated on a 10 point scale where 10 is extremely useful and 1 is not at all useful.

Typical South Walton visitor

- **19%** - use the term “South Walton”
- When planning their trip to South Walton:
 - **49%** - considered going to only 1 of the 16 beach communities
 - **38%** - considered going to another South Walton beach community
 - **9%** - considered vacationing outside of South Walton
 - **4%** - considered going to a beach destination outside of Florida

Activities in market

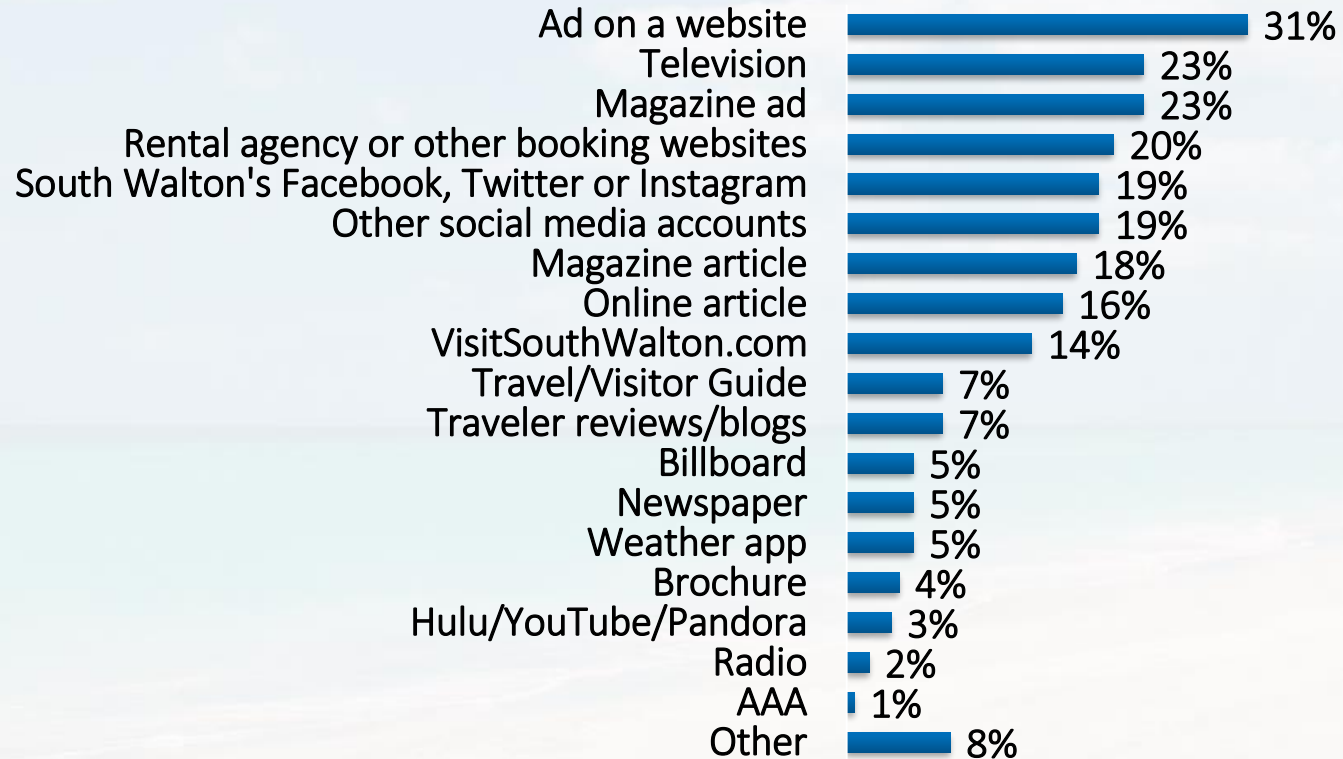
- Visitors engaged in the following activities on their last trip to South Walton¹:



¹Multiple responses permitted.

South Walton Promotions

- **29%** of Summer visitors have recently seen, read or heard advertising, promotions or travel stories about South Walton on the following¹:

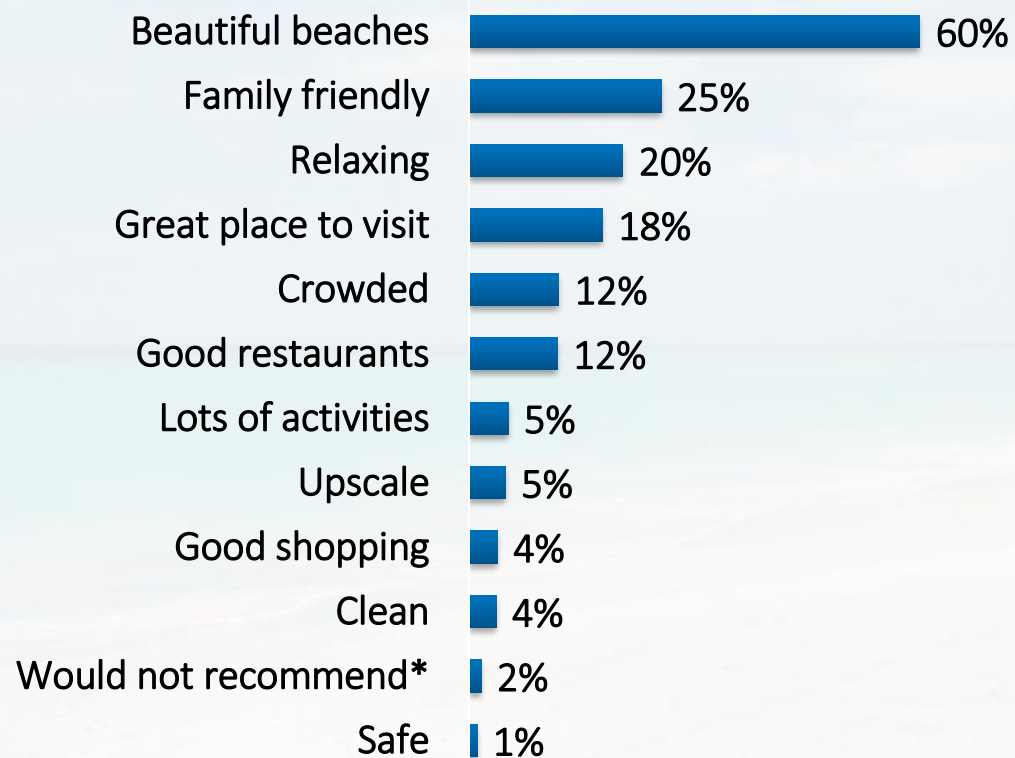


→ This information influenced **6%** of visitors to visit South Walton

¹Multiple responses permitted.

Perceptions of South Walton

- Summer visitors describe South Walton as having **beautiful beaches** and being **family friendly**.¹

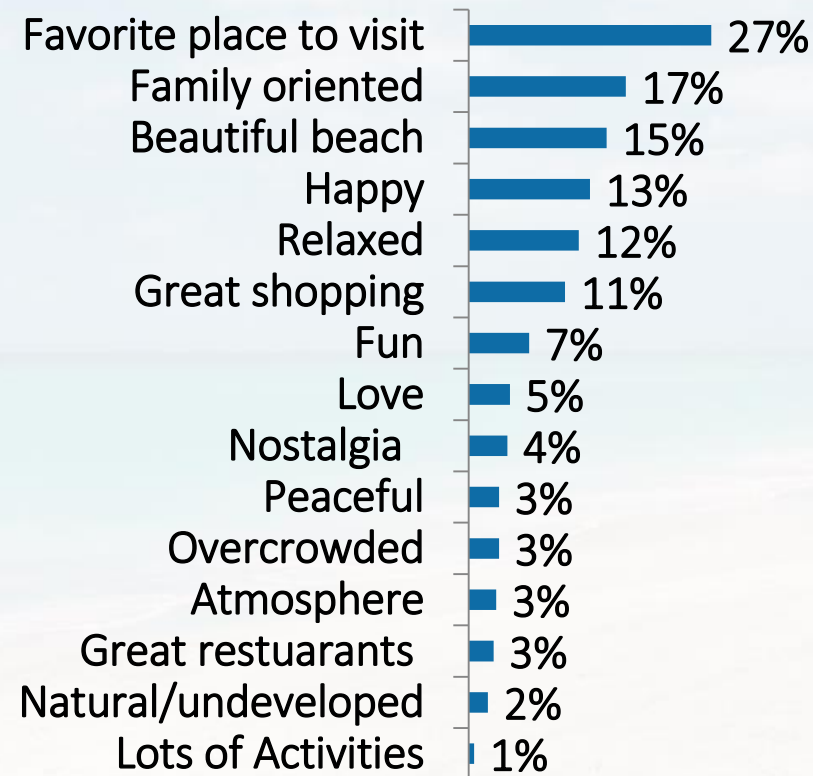


¹Coded verbatim response; multiple responses permitted.

*31 comments about the negative impact of the new customary use law.

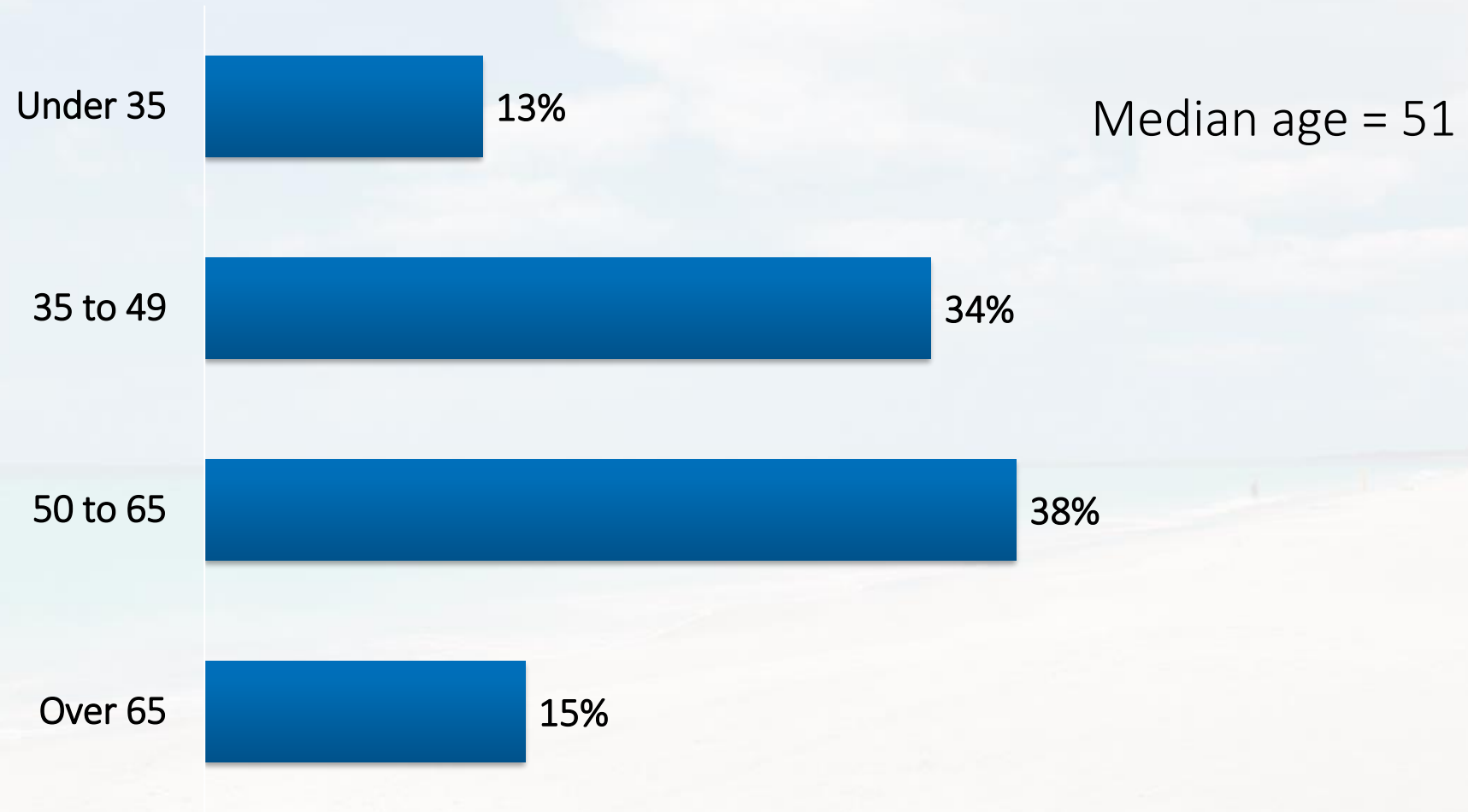
Emotions associated with South Walton

- Summer visitors describe the following feelings or emotions they get when visiting South Walton that they don't get when visiting other beach destinations.¹

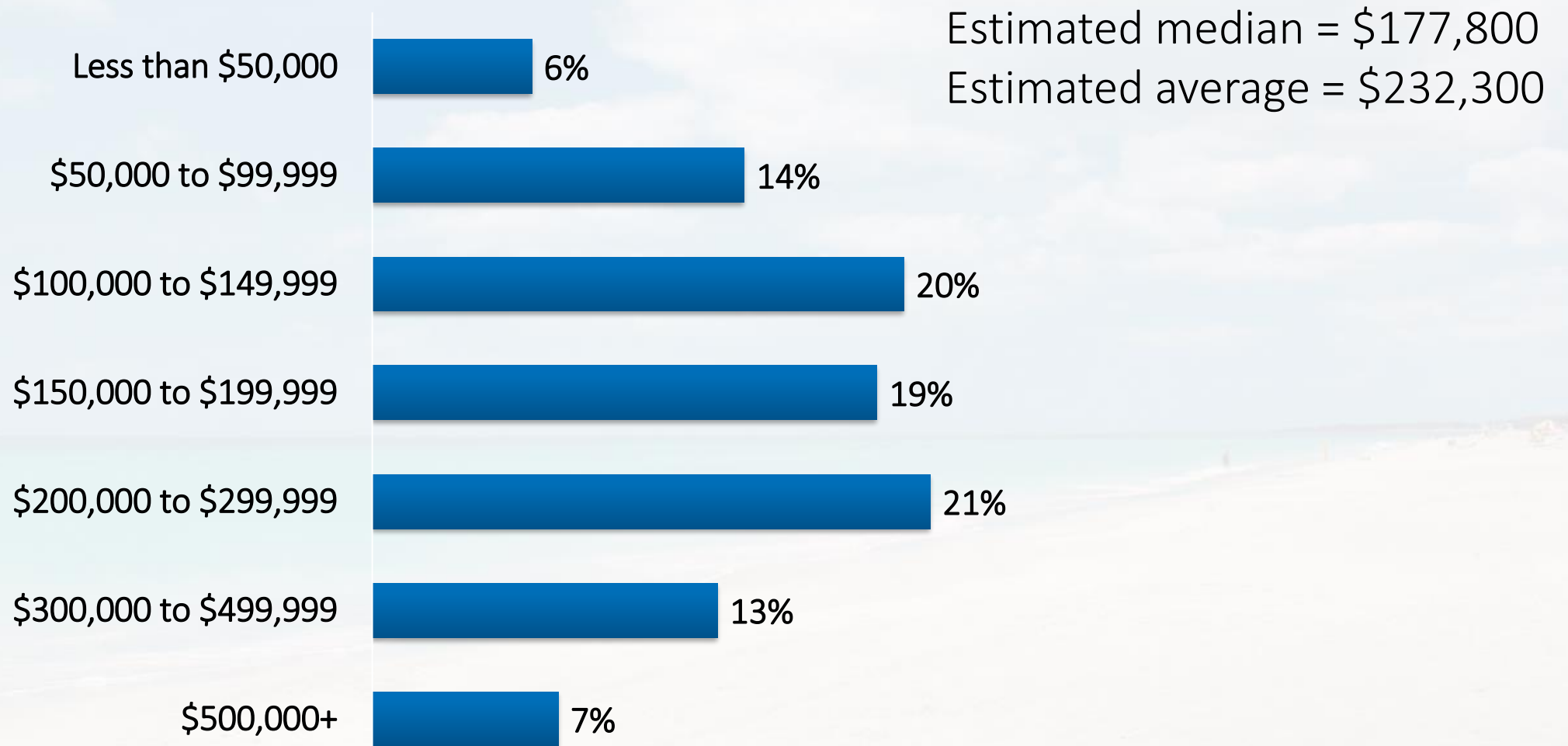


¹Coded verbatim response; multiple responses permitted.

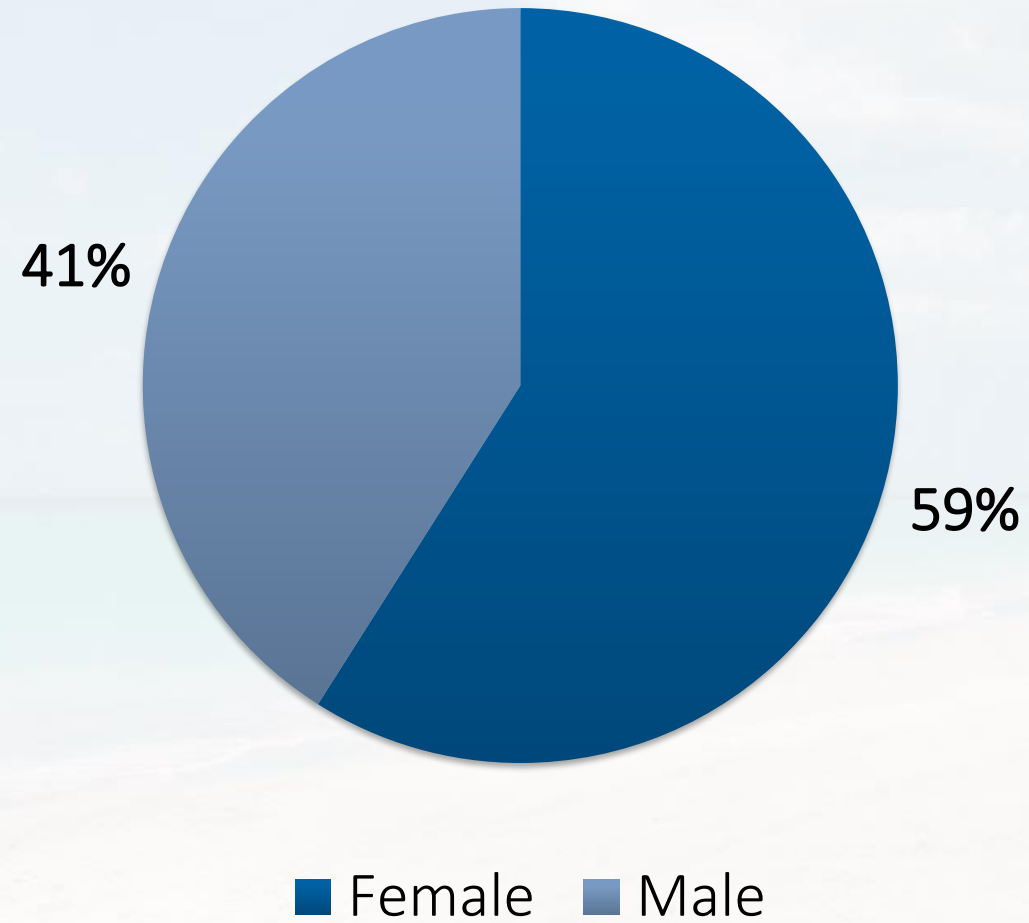
Age of Summer Visitors



Total household income in 2017



Gender





Visit South Walton Summer 2018 Visitor Tracking Study

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