



# Visit South Walton

Visitor Tracking & ADR Study Fall 2017

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# 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

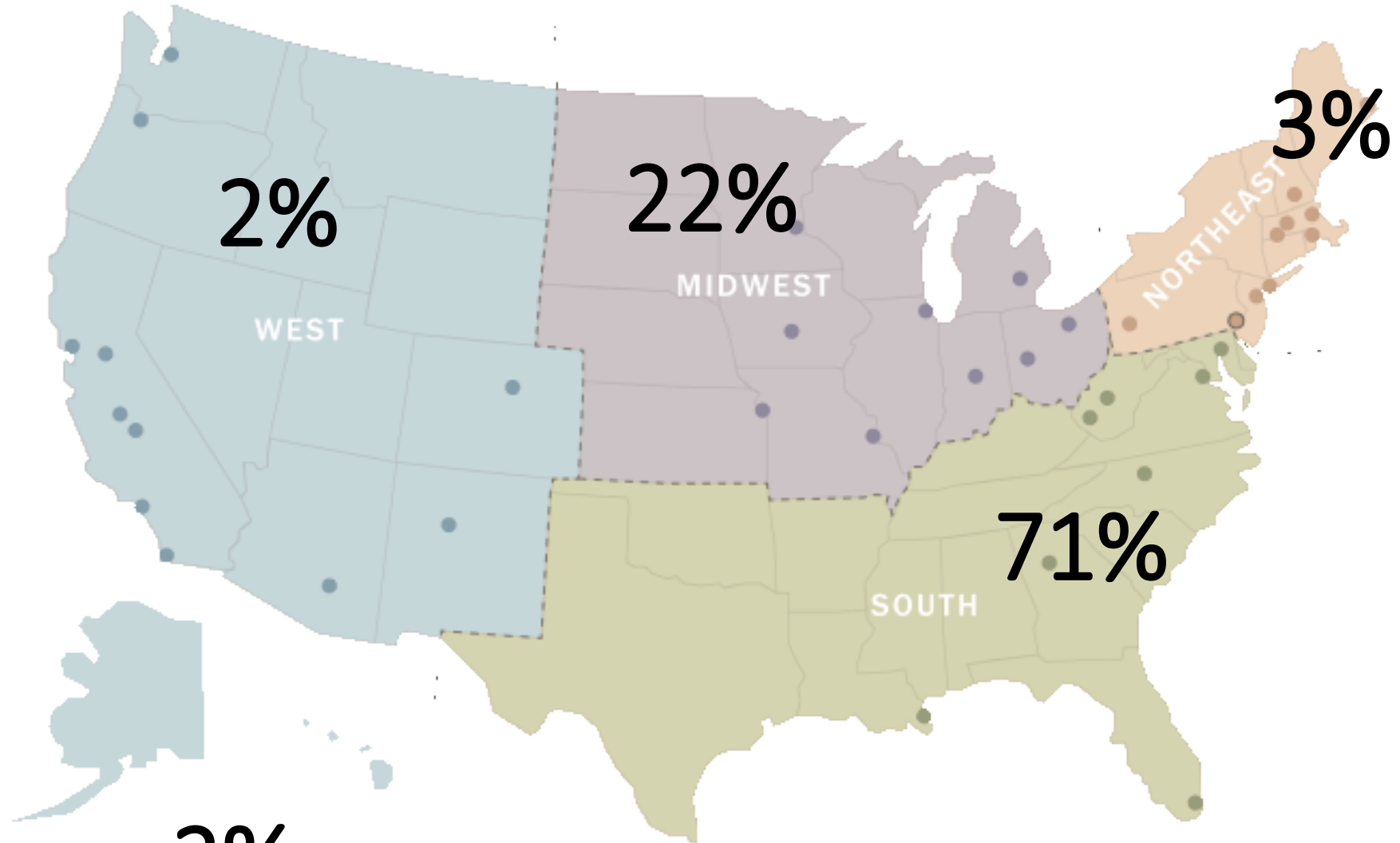
# Methodology

- Internet survey
- Sample Size - 605 completed interviews<sup>1</sup>
- Target Individuals: Visitors to South Walton in September 2017, October 2017, and November 2017

<sup>1</sup>Interviews are with out-of-county guests who stay at large properties/vacation rental agencies at beach communities across South Walton.

# Executive Summary

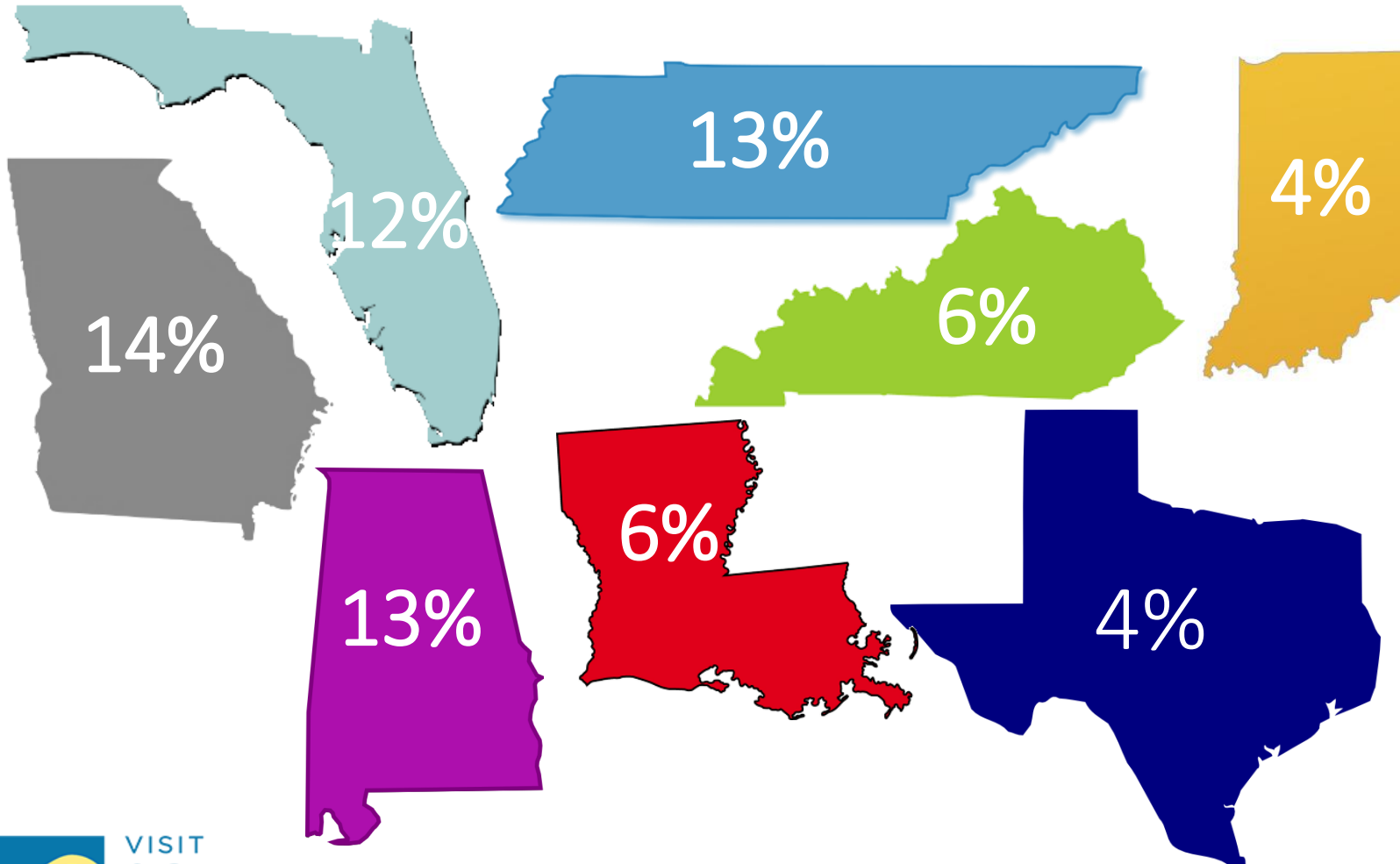
# Origin of Visitors



**2%** of visitors were from areas outside the U.S.

# Origin of Visitors

- **72%** of visitors were from 8 states



## Top 8 States

Georgia

Alabama

Tennessee

Florida

Kentucky

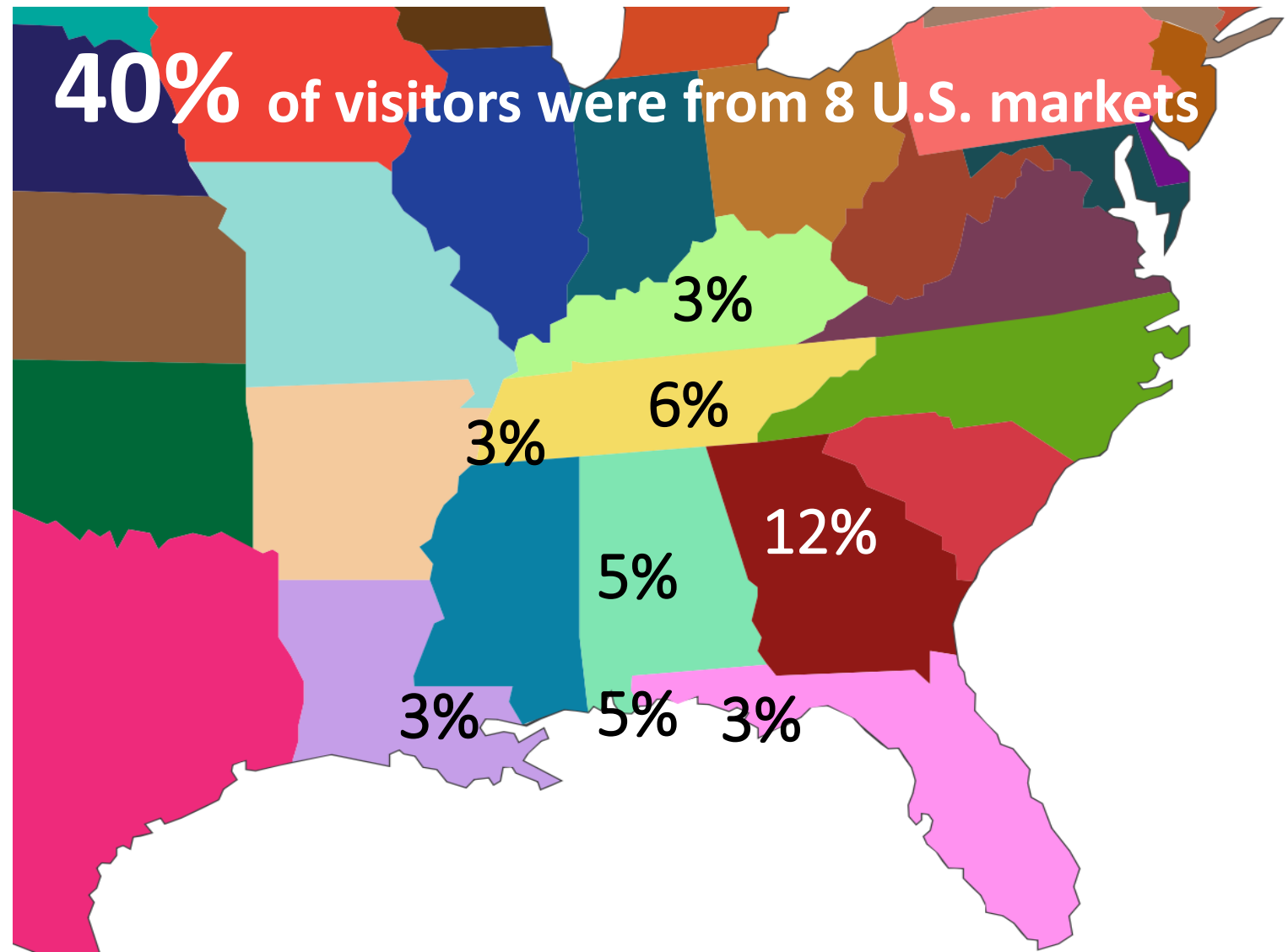
Louisiana

Texas

Indiana

# Origin of Fall Visitors

Top Markets	% of Visitors
Atlanta	12%
Nashville	6%
Pensacola-Mobile	5%
Birmingham	5%
Louisville	3%
Panama City-Destin	3%
Memphis	3%
Baton Rouge	3%



# Accommodations

80% - Condos, rental houses, etc.



10% - Hotel/motel

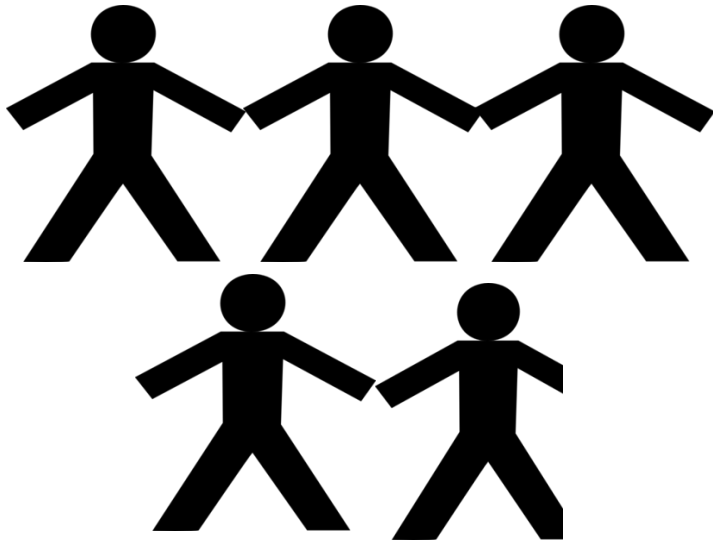


5% - Personal condo, houses, etc.



# Travel Parties

The typical visitor traveled in a party composed of **4.8** people



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



# Length of stay

- Visitors spent **5.8** nights in South Walton



# Top Booking Accommodations

- Visitors used the following to book their Fall trip:

Vacation Rental Company (58%)



Hotel/condo (28%)



EMBASSY SUITES  
HOTELS®



VRBO, Homeaway (9%)



# Transportation

- 85% of visitors **drove** to South Walton
- 15% who **flew** used the following airports:

44%

Northwest Florida Regional  
Airport (Ft Walton Beach)



40%

Northwest Florida Beaches  
International Airport (Panama City)



11%

Pensacola International  
Airport



# Visitation

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



# Visitor satisfaction

- Visitors gave South Walton a rating of **9.2<sup>1</sup>** as a place to vacation
- **96%** will return to South Walton<sup>2</sup>



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

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

1. Poor customer service;
2. too expensive;
3. prefer other beaches.

# Top reasons for visit<sup>1</sup>

To relax and unwind (56%)



Family vacation (55%)



Annual routine (22%)



Special occasion (20%)



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

# Top activities during visit<sup>1</sup>

Restaurants (93%)



Beach (91%)



Relax and unwind (89%)



Family time, reading, cooking (71%)



Shopping, antiques (68%)



Biking, running, etc. (39%)



Bars, nightclubs (26%)



Water sports (23%)



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

# Visitor spending

- Visitors spent **\$705** a day
- Visitors spent **\$4,097** on their trip



# Trip planning

- **3 in 10** visitors plan a Fall South Walton vacation 6 months out or more
- Top trip planning sources:

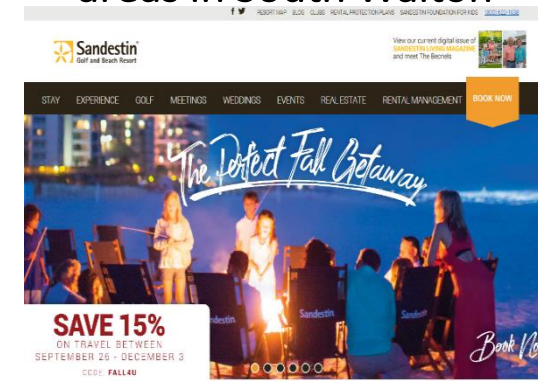
Friends, family



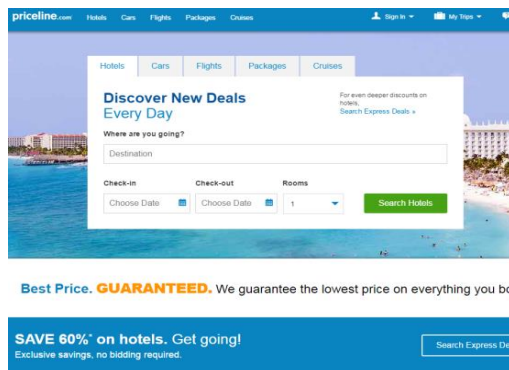
Search on Google, Yahoo, etc.



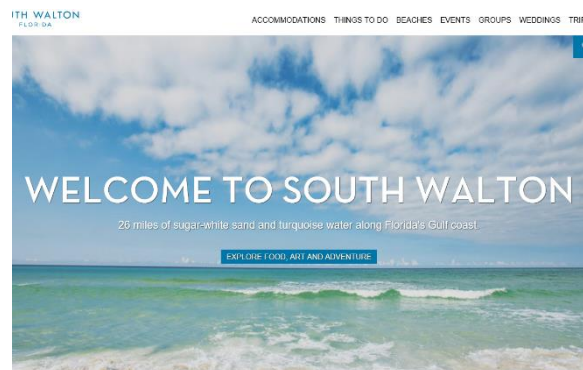
Website for 1 of the 16 beach areas in South Walton



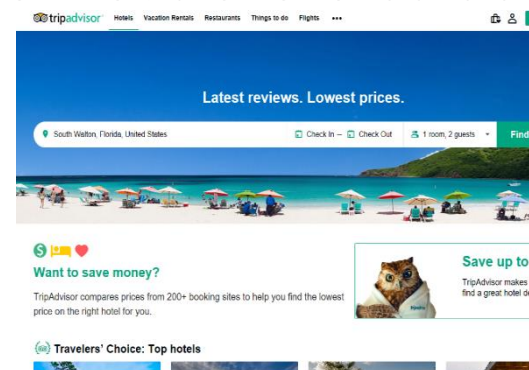
Travel websites



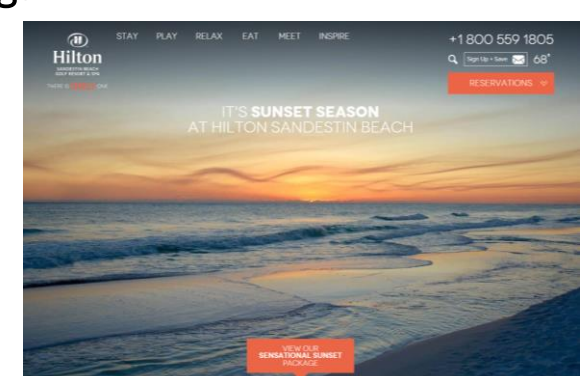
VisitSouthWalton.com



Online travel reviews and blogs



Hotel websites



# Visitors guide

- **21%** of visitors viewed the South Walton Visitors Guide before going to South Walton
- Visitors Guide received a rating of **7.7 out of 10<sup>1</sup>**

<sup>1</sup>10 = Extremely useful; 1 = Not at all useful



# Other destinations

- When planning their trip to South Walton:
  - **57%** of visitors considered going to only 1 of the 16 beach communities
  - **31%** considered going to another South Walton beach community



# Where visitors stayed

- **22%** of fall visitors to South Walton stayed at Miramar Beach during their last visit
- Top South Walton beaches that visitors stayed at during their last visit:

Miramar Beach



Sandestin



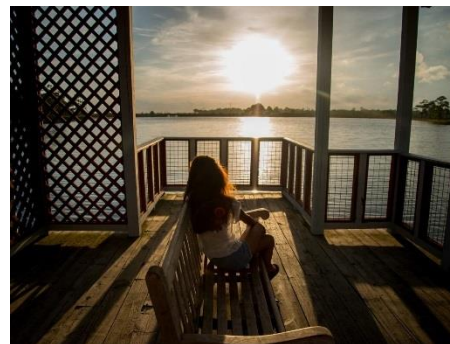
Santa Rosa Beach



Seagrove



Watercolor Beach



Grayton Beach



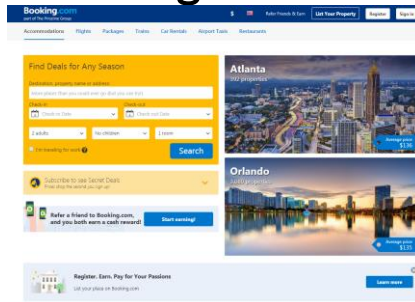
# South Walton Promotions

- 27% of fall visitors have recently seen, read or heard advertising, promotions or travel stories about South Walton
- Top sources of recall:

Magazine article



Rental agency/  
booking websites



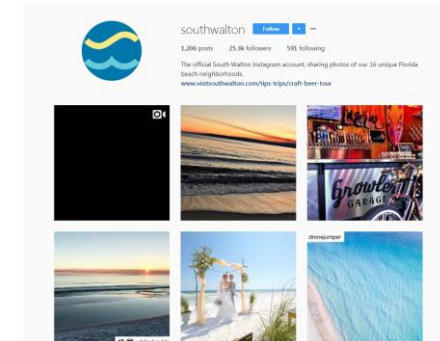
Online article



Television



VSW social  
media accounts



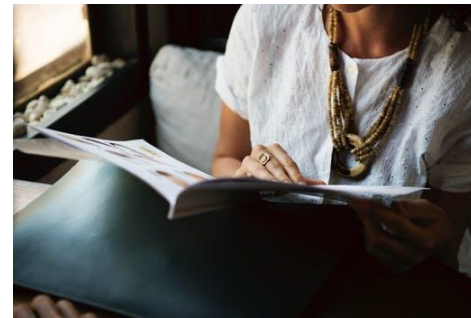
Other social  
media accounts



VisitSouthWalton.com



Magazine Ad



Website Ad



Travel/visitor guide



# Perceptions of South Walton



## Beautiful beaches

“Most beautiful beaches in the United States, and the friendliest people.”



## Great place to visit

“Great place to visit with sugary white beaches and high end communities.”



## Relaxing

“The perfect place to relax and leave all worries behind you! The scenery is beautiful and many places are within walking distance.”



## Family friendly

“An ideal family vacation where you feel safe letting your children ride their bikes and play.”

# Demographics

- The typical South Walton fall visitor:
  - **55** years old
  - **Female (57%)**
  - **Median** household income of **\$163,000**
  - **Average** household income of **\$216,500**
  - From the **Southeast (71%)**



# Yearly Comparisons

# Tourism Metrics – Fall 2016 vs. 2017

Property Statistics	Fall 2016	Fall 2017	% Change
Occupancy	50.9%	51.9%	+2.0%
Room rates	\$278.98	\$285.43	+2.3%
RevPAR	\$142.00	\$148.14	+4.3%
Room nights	557,200	589,200	+5.6%
Total visitors	580,600	609,700	+5.0%
TDT collections	\$3,936,249	\$4,117,973	+4.6%
Direct spending	\$597,362,900	\$626,063,300	+4.8%
Economic impact	\$884,097,100	\$926,573,700	+4.8%

*Data sources:* Walton County government, properties in South Walton that rent to visitors, and visitor surveys by Downs & St. Germain Research. Adjustments were made to 2016 data based on inventory updates.

# Visitor Profile – Fall 2016 vs. 2017

Visitor Metrics	Fall 2016	Fall 2017
Travel party	4.7	4.8
Kids <20	49%	44%
Median age	53	55
Estimated median household income	\$161,800	\$163,000 <sup>1</sup>
Stayed in condo/rental house	76%	80%
Drove	84%	85%
Nights spent	5.6	5.8
Direct expenditures (entire trip) <sup>2</sup>	\$3,909	\$4,097
1 <sup>st</sup> time visitor	20%	17%
10+ visits to South Walton	33%	40%

<sup>1</sup>Estimated average household income = \$216,500

<sup>2</sup>Visitors who stayed in paid accommodations.

# Visitor Profile – Fall 2016 vs. 2017

Visitor Metrics	Fall 2016	Fall 2017
Use the term “South Walton”	15%	20%
Will return to South Walton	93%	96%
Rating for overall experience <sup>1</sup>	9.2	9.2
Viewed Visitors Guide <sup>2</sup>	21%	21%
Planned trip	4-6 months out	6 months out
Used VisitSouthWalton.com	27%	22%
Used 1 of 16 beaches’ websites	42%	31%

<sup>1</sup>10-point scale with 10=Excellent & 1=Poor.

<sup>2</sup>18% used the online version & 3% used the print version.

# Visitor Profile – Fall 2016 vs. 2017

Top Origin States	Fall 2016	Fall 2017
Georgia	14%	14%
Alabama	13%	13%
Tennessee	14%	13%
Florida	13%	12%
Kentucky	3%	6%
Louisiana	5%	6%
Origins - Regions		
Southeast	74%	71%
Northeast	4%	3%
West	4%	2%
Midwest	16%	22%
International	2%	2%

# Visitor Profile – Fall 2016 vs. 2017

Visitor Activities	Fall 2016	Fall 2017
Restaurant	91%	93%
Beach	88%	91%
Relax & unwind	88%	89%
Family time, read, cook	69%	71%
Shop, antique	74%	68%
Bike, run, etc.	45%	39%
Bars, nightclubs	27%	26%
Water sports	25%	23%
Attractions	20%	19%
State parks	11%	18%
Hiking, nature walks	15%	17%
Special events	16%	17%
Golf & tennis	16%	16%

# Detailed Findings

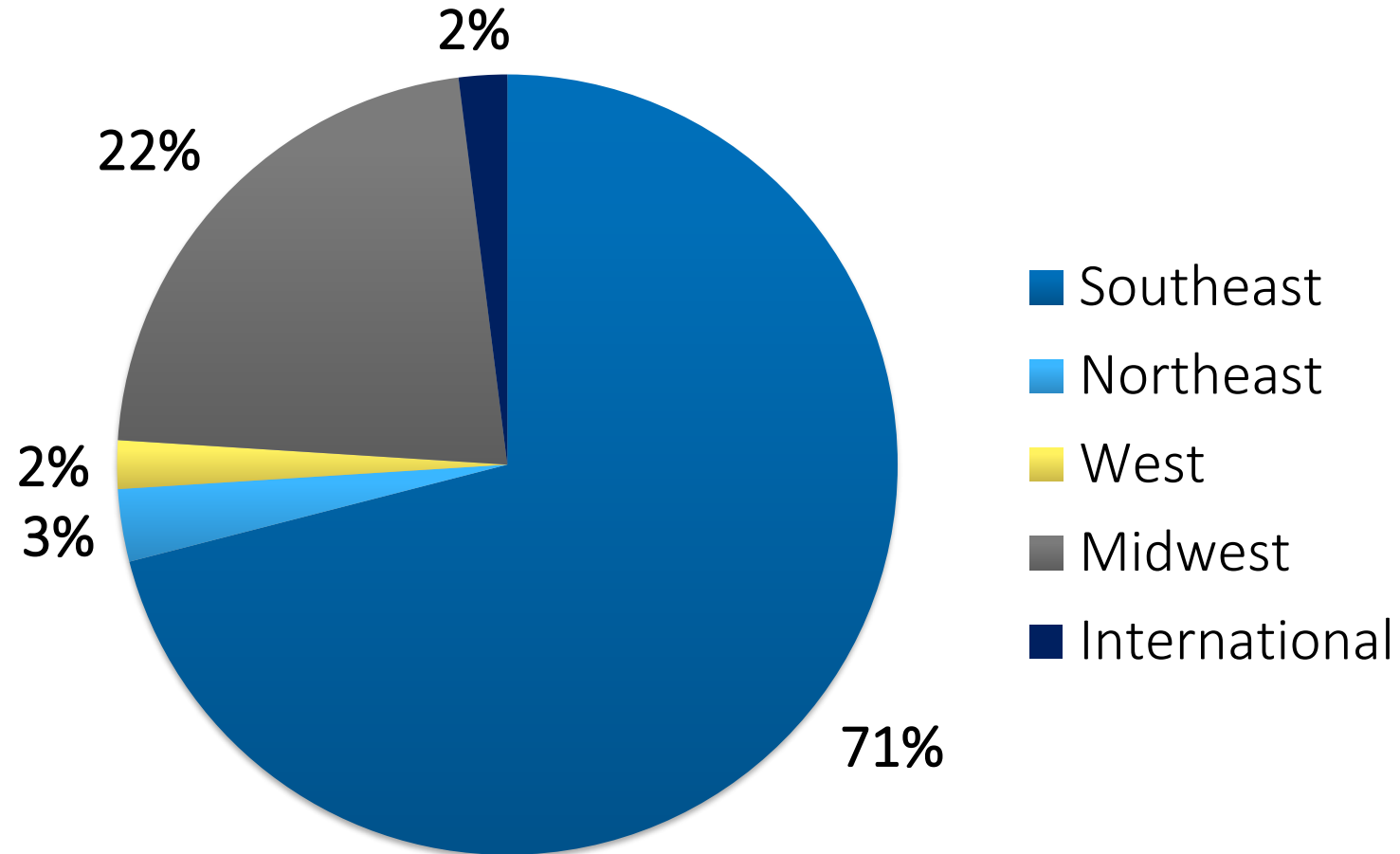
# Typical South Walton Visitor

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- Travel party = **4.8** people
  - **44%** traveled with at least one person under the age of 20 in their travel party
- Was **55** years old
- Was female (**57%**)
- Had a median household income of **\$163,000**
- Was from the **Southeast (71%)**
- Stayed in a **condo or rental house (80%)**

# Origin of Fall Visitors

Top Origin Markets	% of Visitors
Atlanta	12%
Nashville	6%
Pensacola-Mobile	5%
Birmingham	5%
Louisville	3%
Panama City-Destin	3%
Memphis	3%
Baton Rouge	3%
Orlando	2%
St. Louis	2%
Dallas-Ft. Worth	2%
Cincinnati	2%
New Orleans	2%
Houston	2%
Knoxville	2%
Tampa-Clearwater-St. Petersburg	2%
Montgomery	2%
Chattanooga	2%
Indianapolis	2%



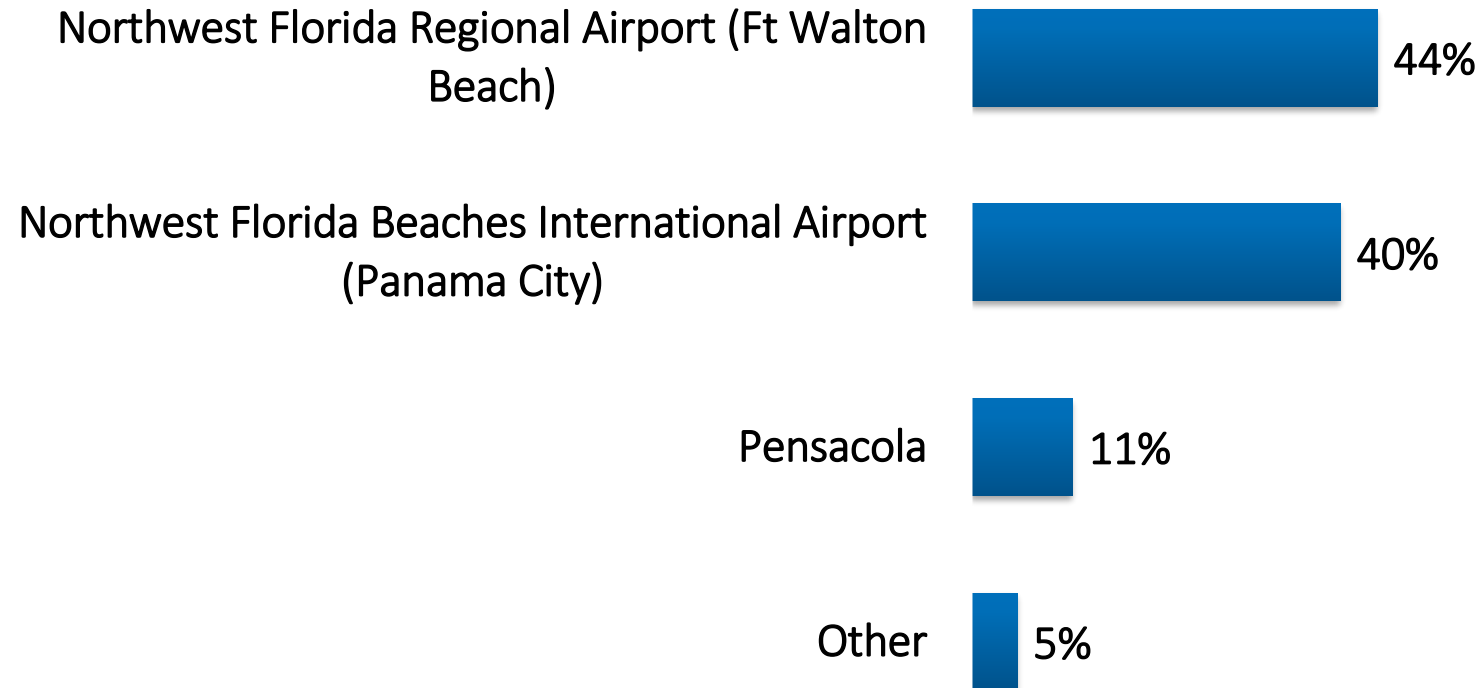
# Origin of Fall Visitors

- **78%** of Fall visitors live in **10** states

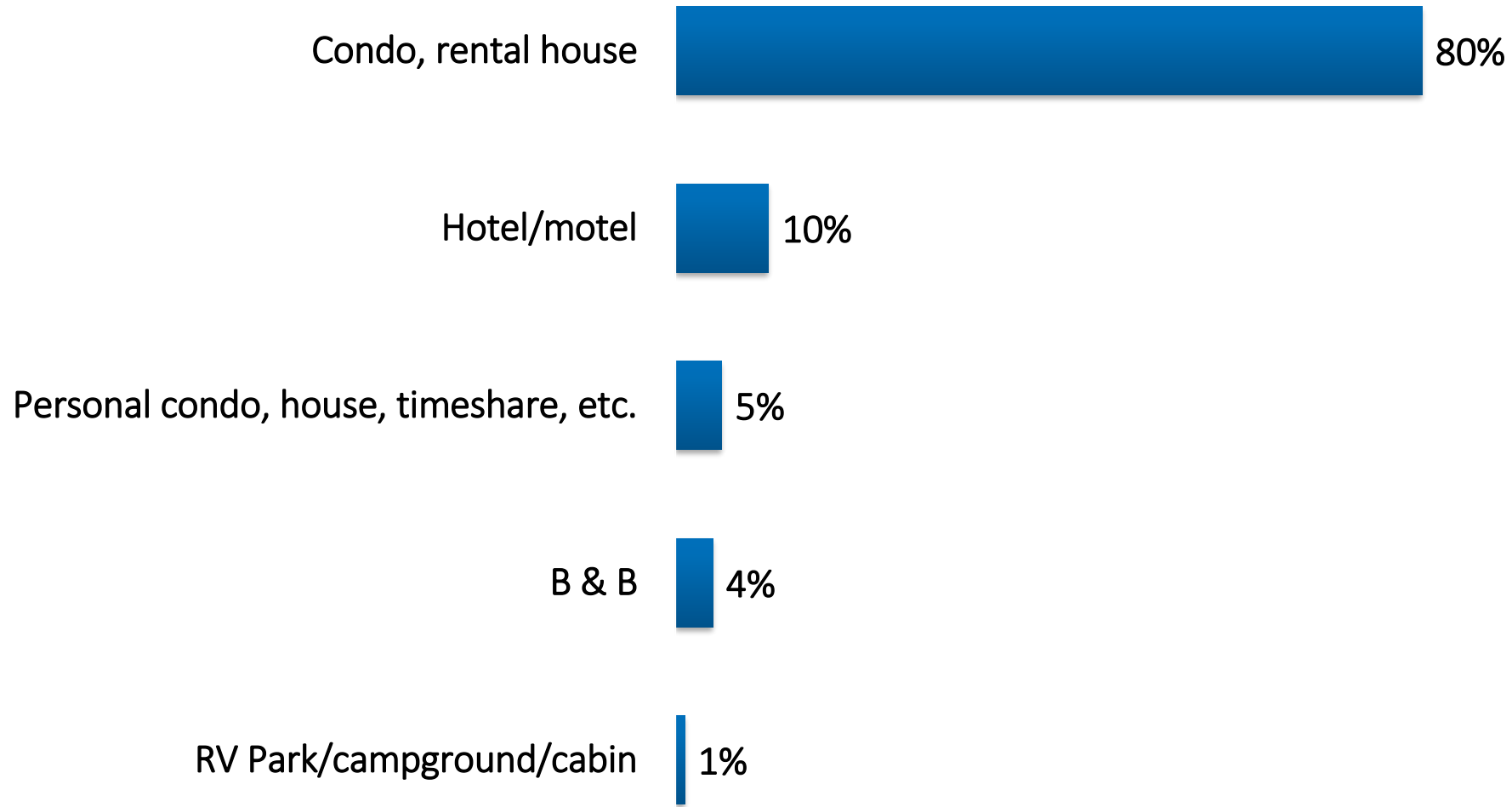
Georgia	14%
Alabama	13%
Tennessee	13%
Florida	12%
Kentucky	6%
Louisiana	6%
Texas	4%
Indiana	4%
Mississippi	3%
Missouri	3%

# South Walton visitor transportation

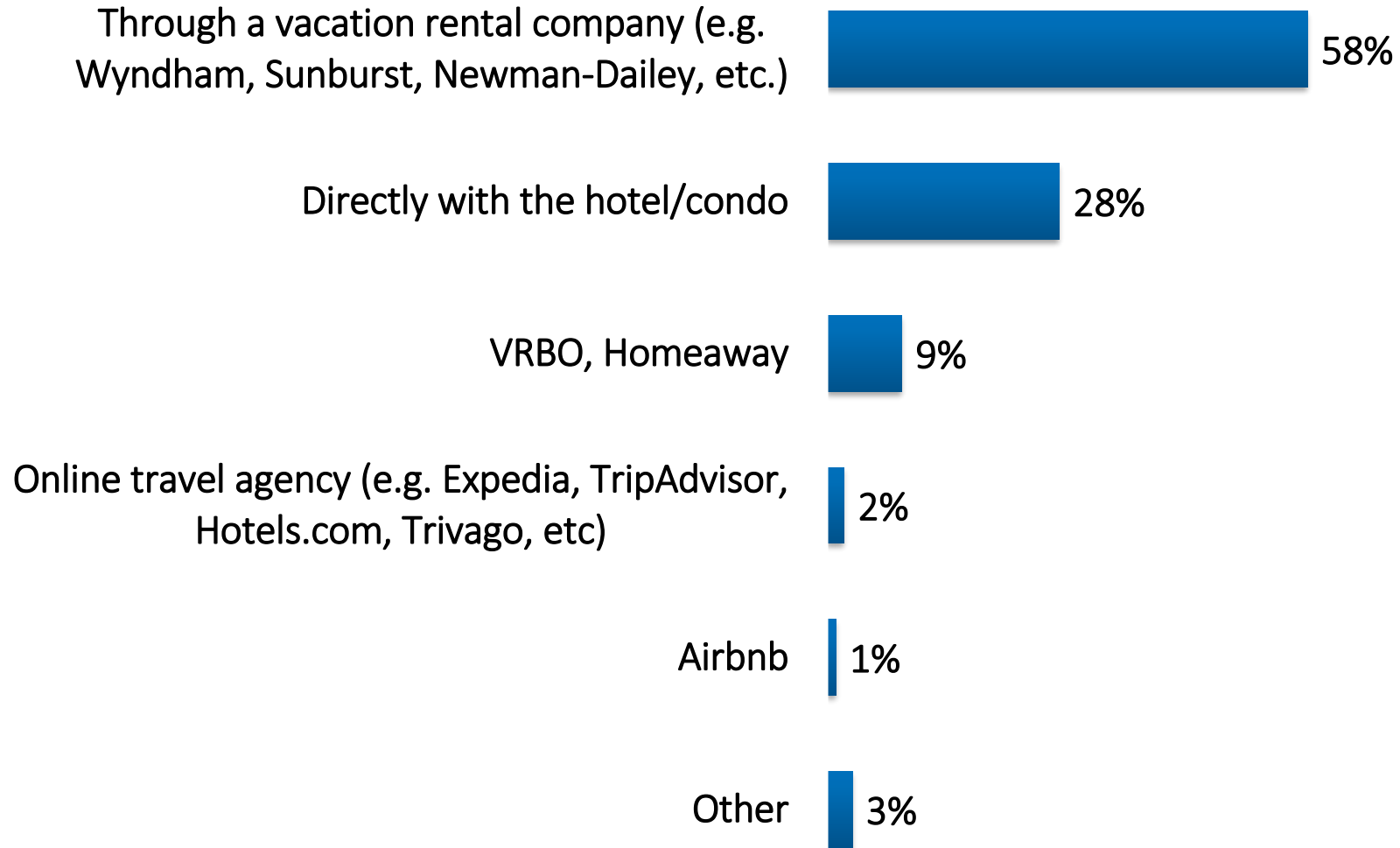
- **Drove** to South Walton (**85%**)
- **25%** of those who drove were aware that there were direct flights from their city to the South Walton area
- **15%** who **flew** used the following airports:



# Visitors' Accommodations

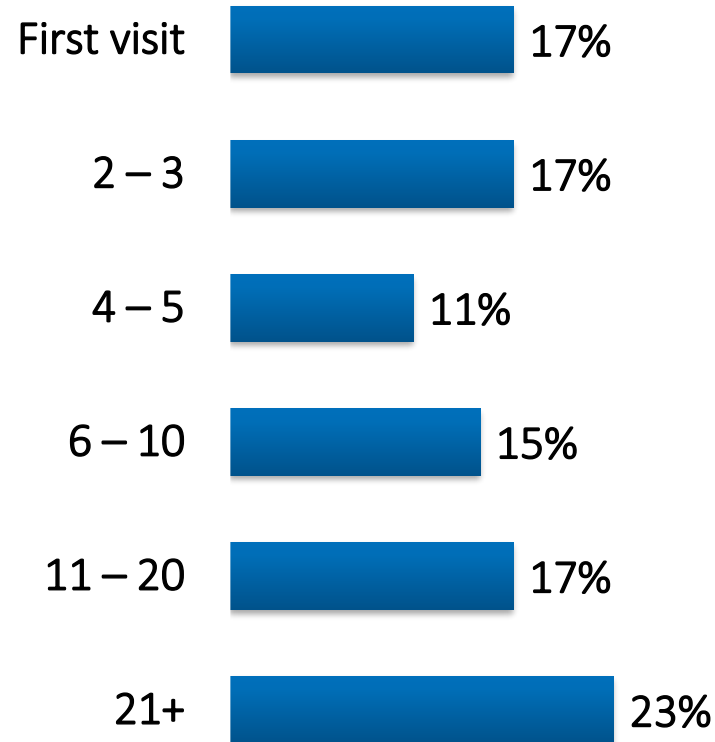


# Booking Accommodations

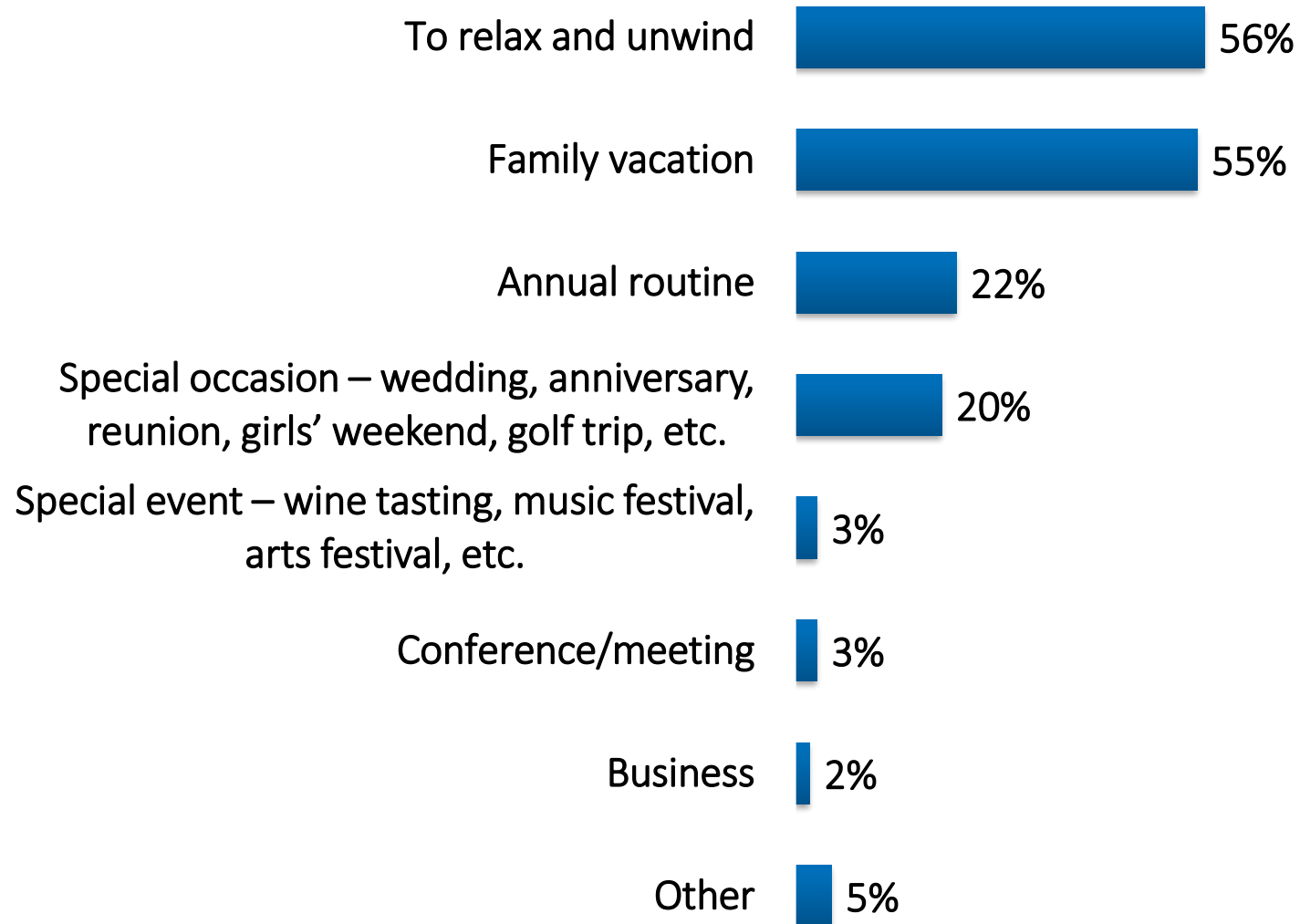


# Typical South Walton visitor

- Spent **5.8 nights** in South Walton
- **17%** were **first time** visitors
- **40%** had visited more than 10 times



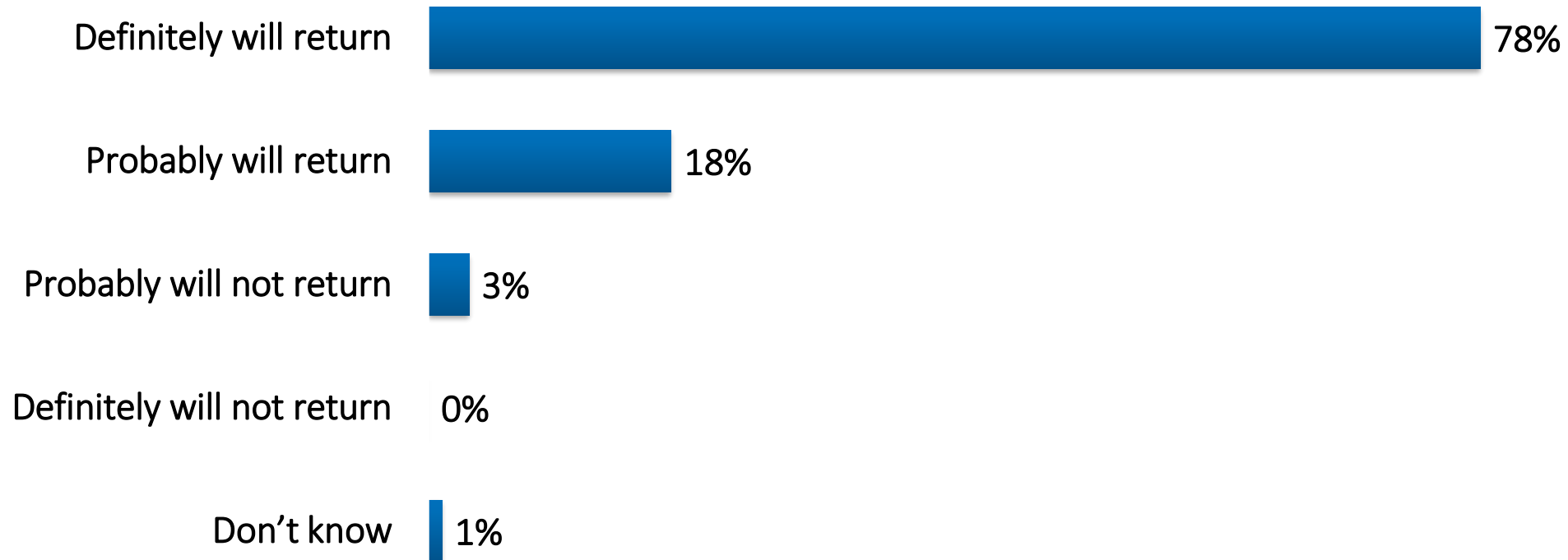
# Reasons for visiting<sup>1</sup>



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

# Satisfaction with South Walton

- Gave South Walton a rating of **9.2<sup>1</sup>** as a place to vacation
- **96%** will return to South Walton<sup>2</sup>



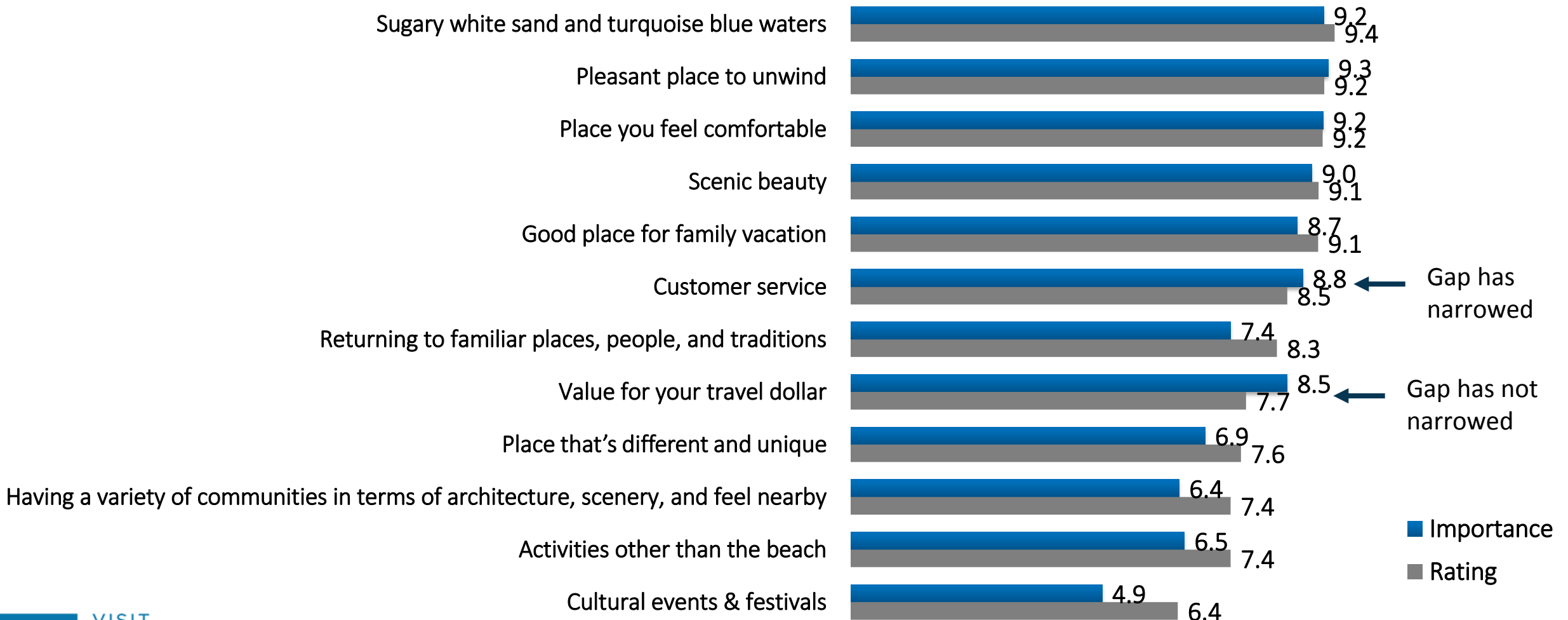
<sup>1</sup>10 = Excellent; 1 = Poor

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

1. Poor customer service;
2. prefer other beaches;
3. too expensive.

# South Walton Attributes: Gap Analysis

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



# Typical South Walton travel party expenses<sup>1</sup>

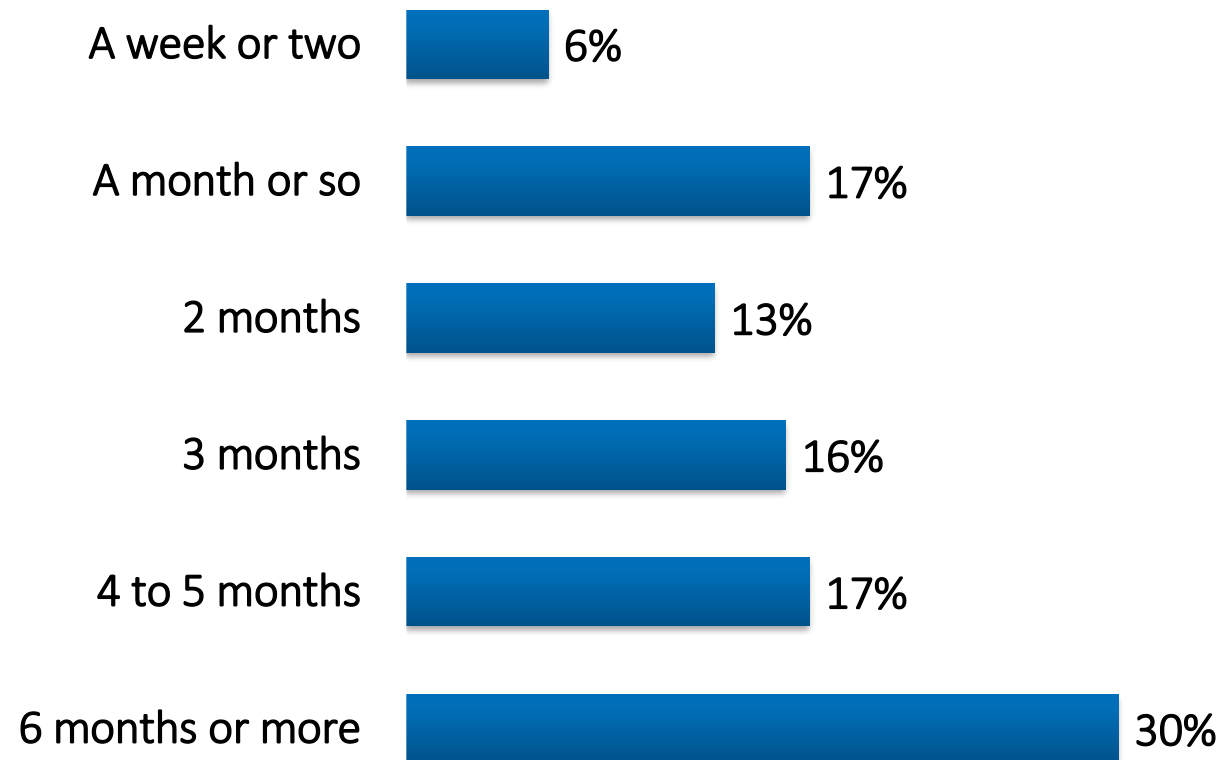
- Spent **\$707** a day
- Spent **\$4,097** on their trip: **+5%** compared to 2016

	Average Daily Expenditure	Total Trip Expenditure
Accommodations	\$286	\$1,656
Restaurants	\$128	\$742
Groceries	\$56	\$325
Shopping	\$105	\$609
Entertainment	\$44	\$255
Transportation	\$47	\$273
Other	\$41	\$237
Total	\$707	\$4,097

<sup>1</sup>This 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.

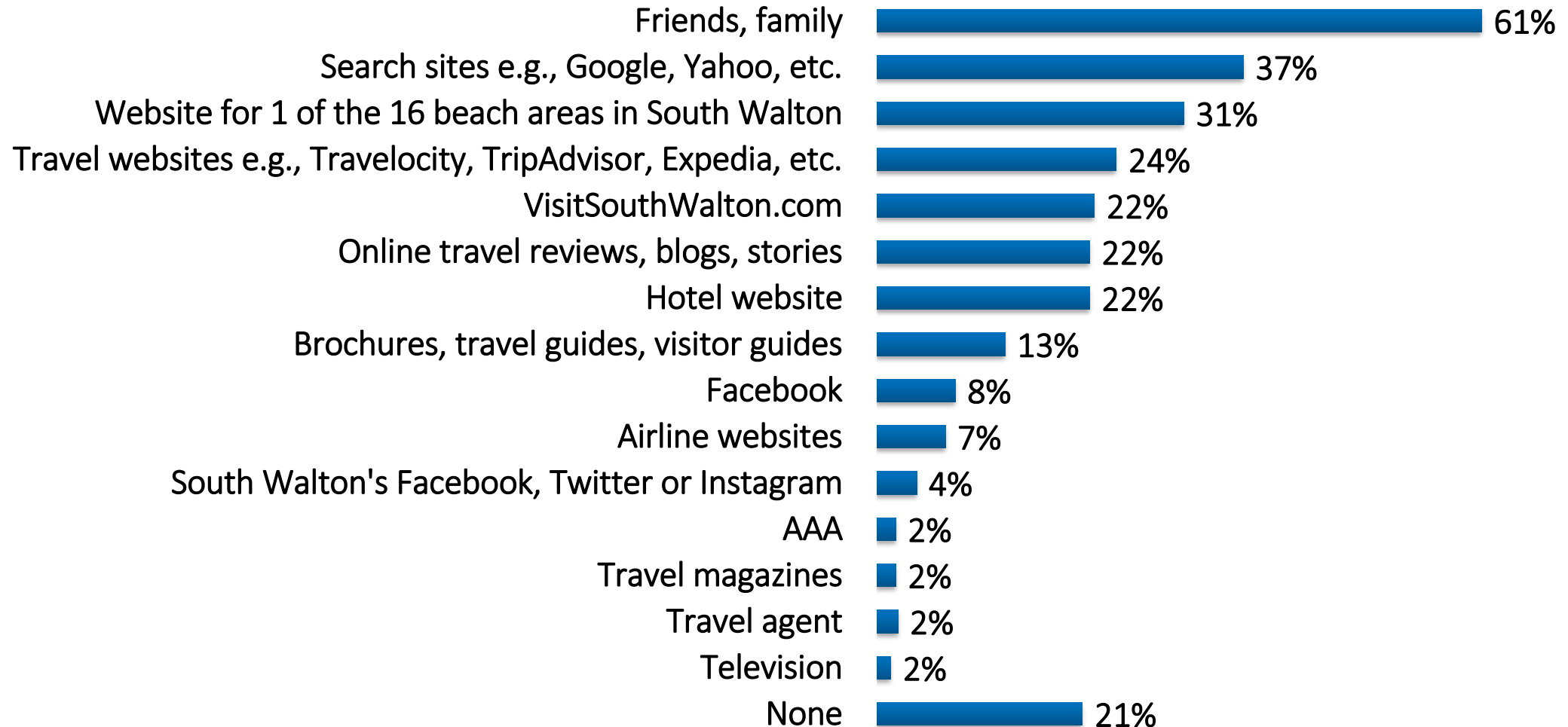
# Planning cycle

- **3 in 10** visitors plan a fall 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 Walton<sup>1</sup>:



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

# Typical South Walton visitor

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- **21%** of visitors viewed a South Walton Visitors Guide before going to South Walton
  - 3% requested a print version
  - 18% viewed the online version
- Visitors Guide received a rating of **7.7 out of 10<sup>1</sup>**

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

# Typical South Walton visitor

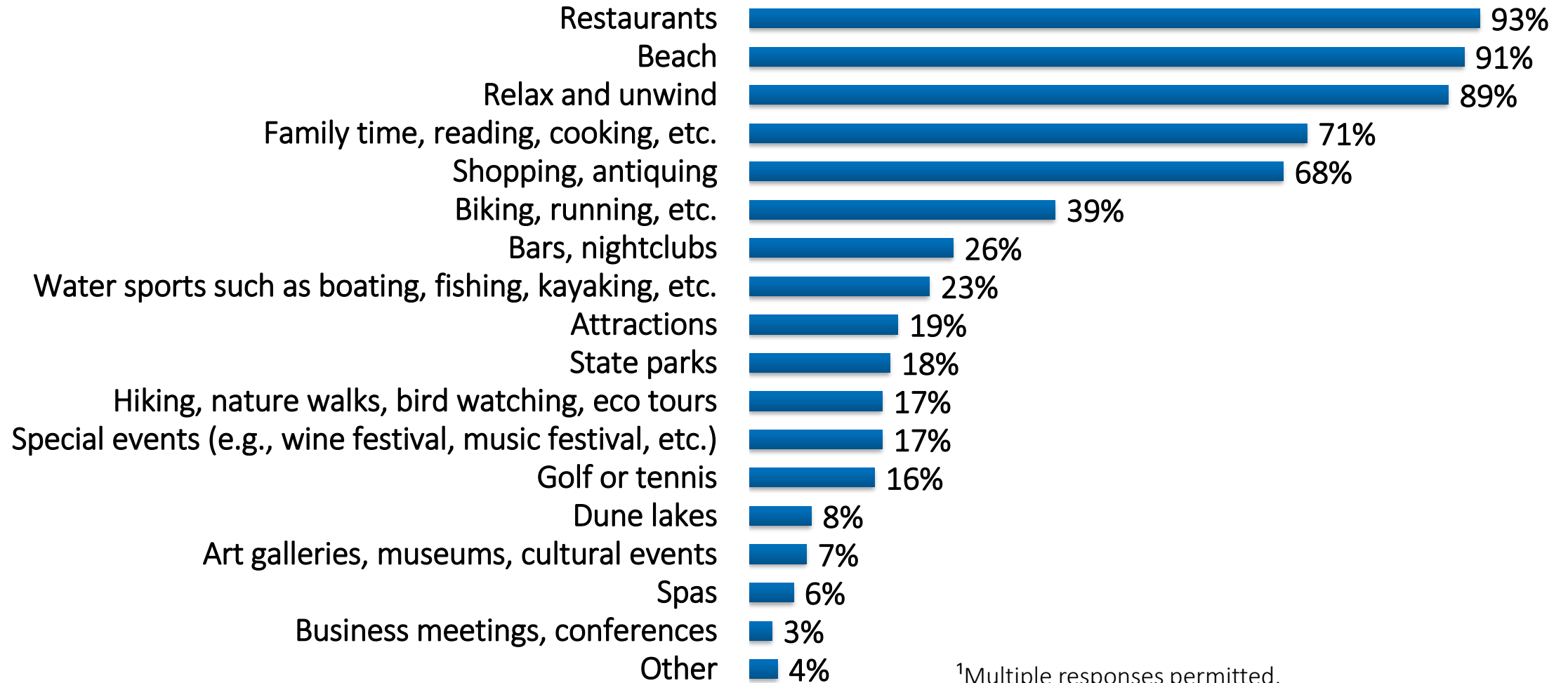
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- **20%** - use the term “South Walton”
- When planning their trip to South Walton:
  - **57%** - considered going to only 1 of the 16 beach communities
  - **31%** - considered going to another South Walton beach community
  - **8%** - considered vacationing outside of South Walton
  - **4%** - considered going to a beach destination outside of Florida

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

# Activities in market

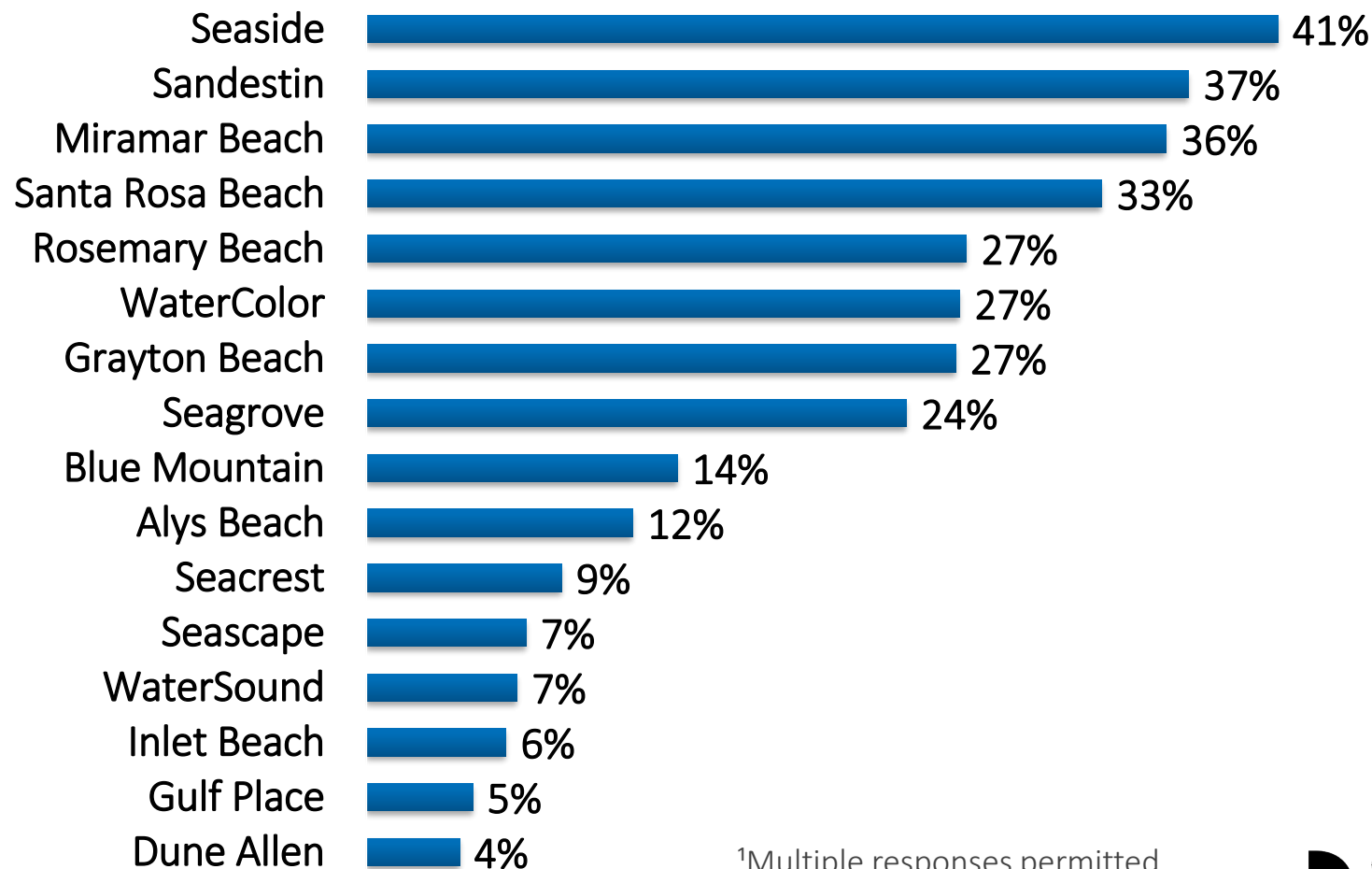
- Visitors engaged in the following activities on their last trip to South Walton<sup>1</sup>:



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

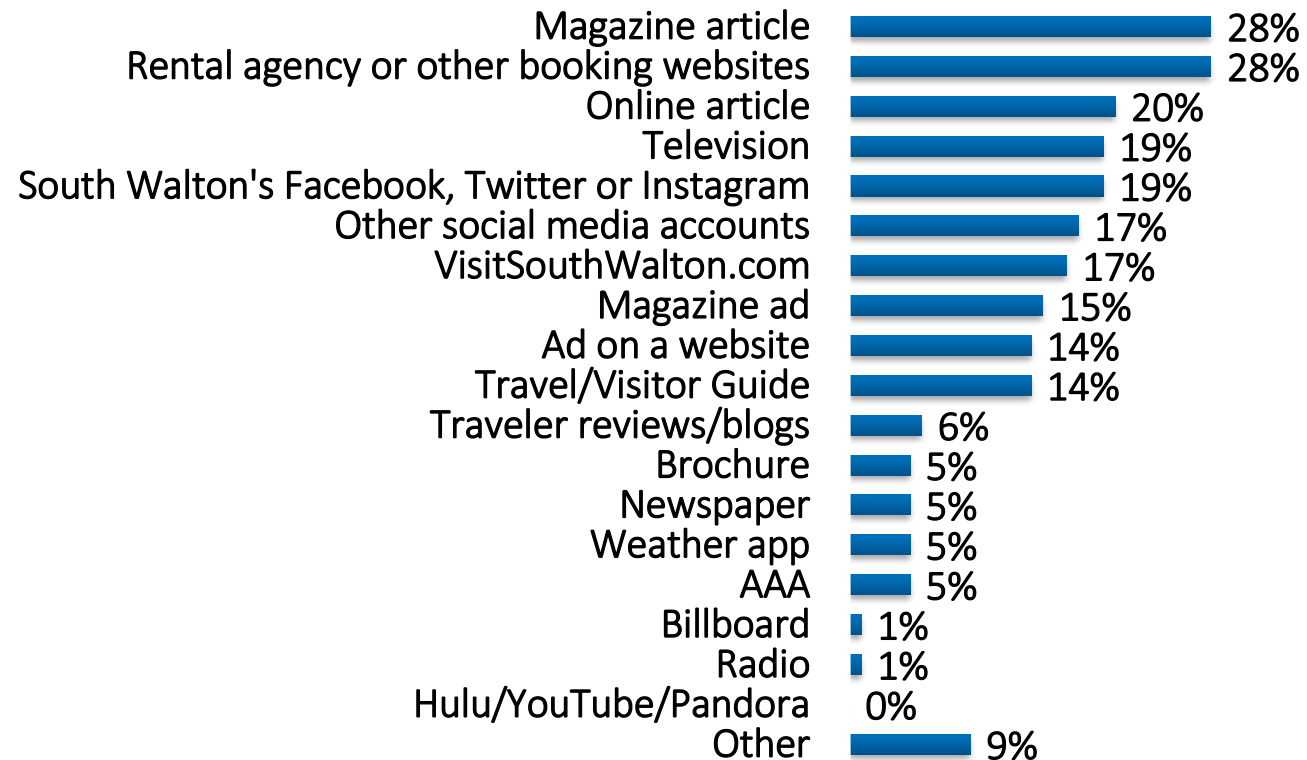
# Experience with South Walton

- Fall visitors have stayed at the following beaches in South Walton in their lifetimes<sup>1</sup>:



# South Walton Promotions

- **27%** of fall visitors have recently seen, read or heard advertising, promotions or travel stories about South Walton on the following<sup>1</sup>:

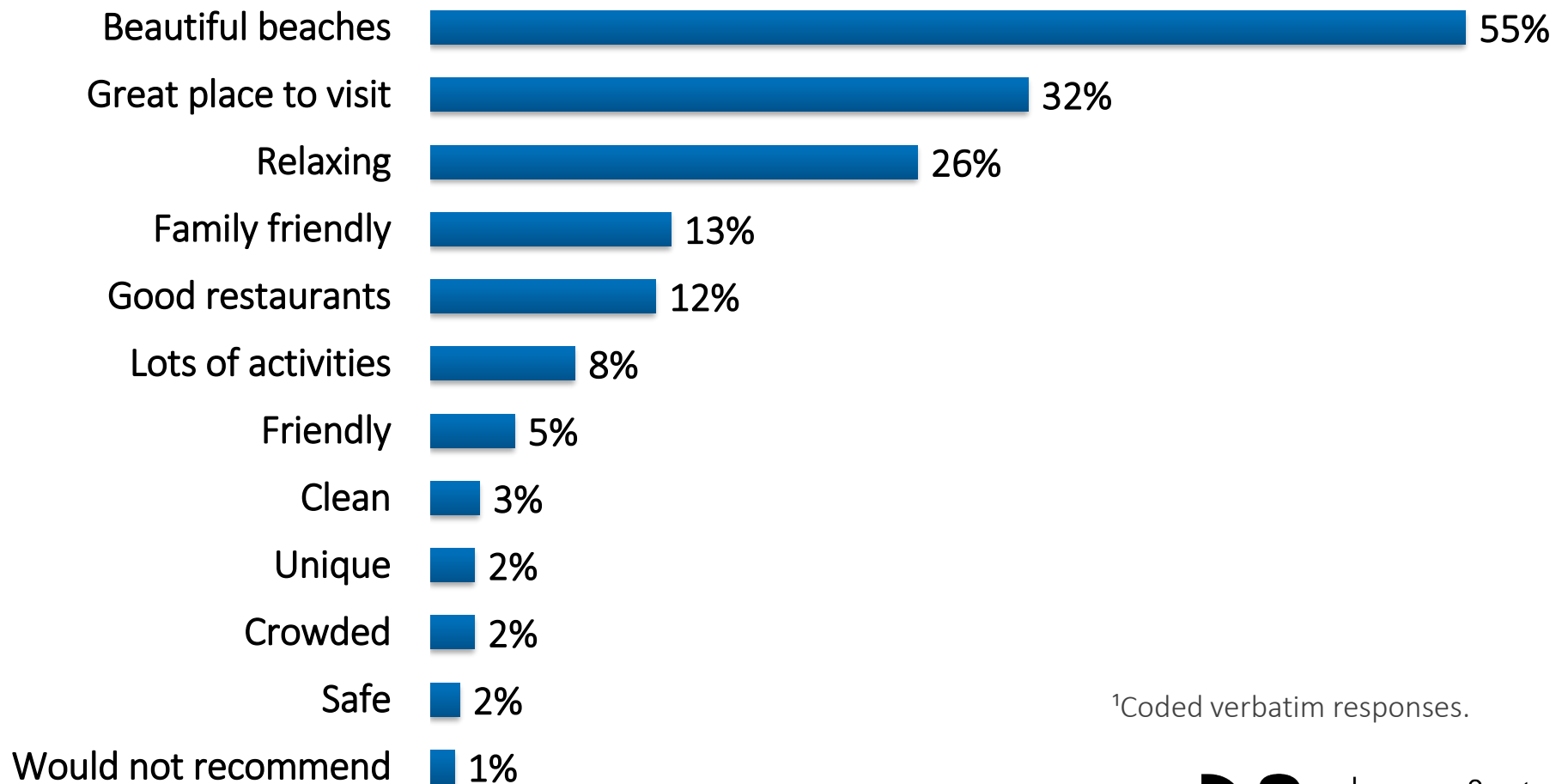


→ This information influenced **7%** of visitors to visit South Walton

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

# Perceptions of South Walton

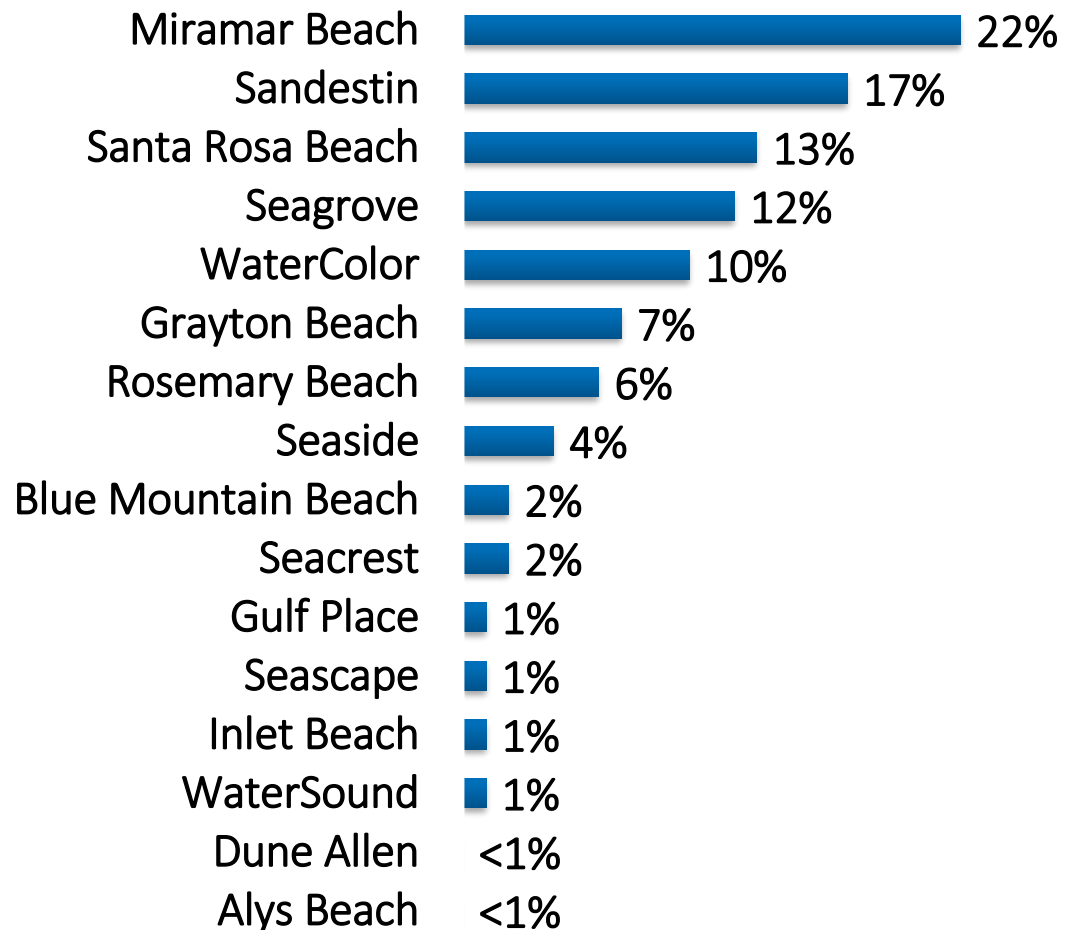
- Fall visitors describe South Walton as having **beautiful beaches** and being a **great place to visit**.<sup>1</sup>



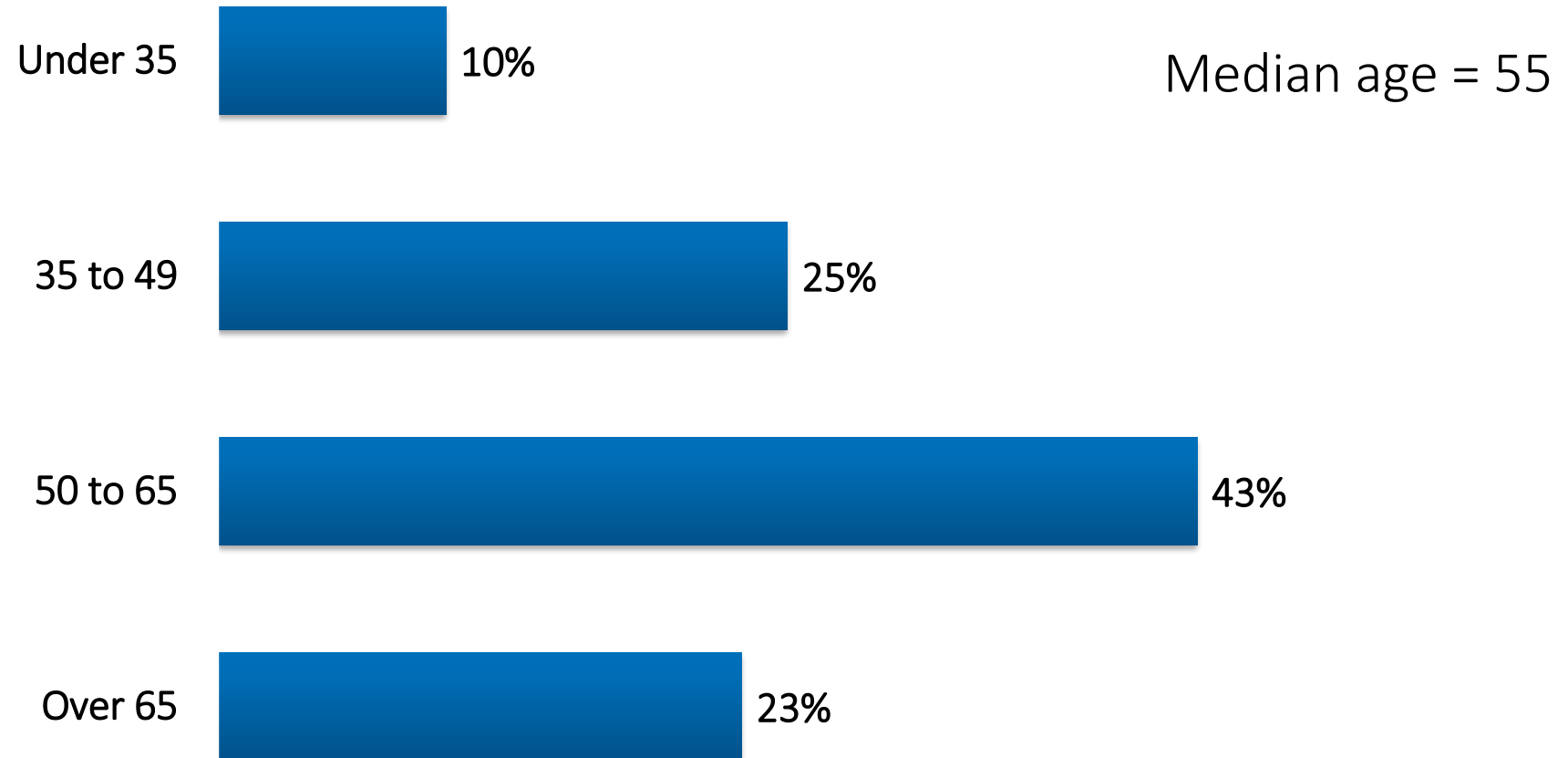
<sup>1</sup>Coded verbatim responses.

# Where visitors stayed

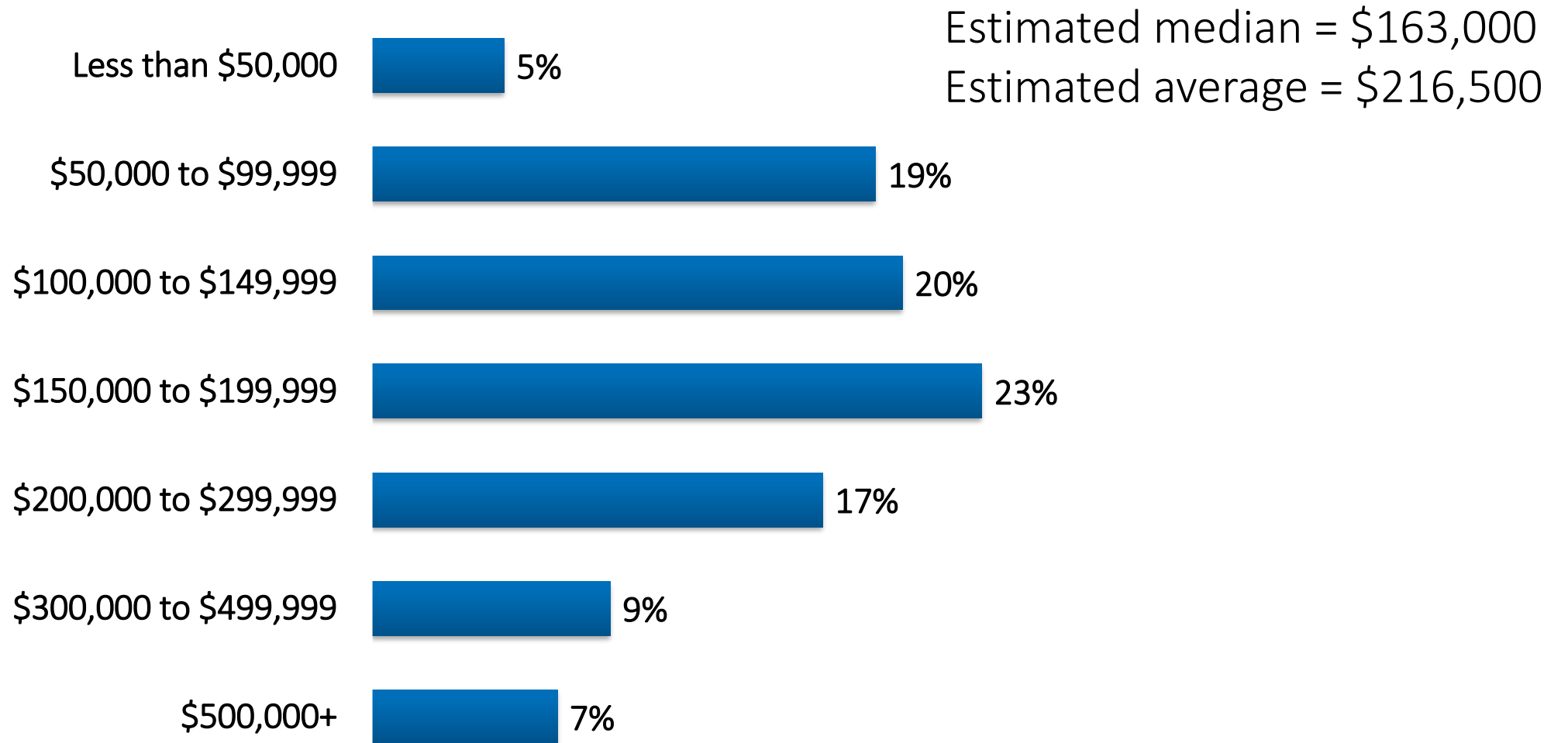
- Fall visitors stayed at the following South Walton beaches:



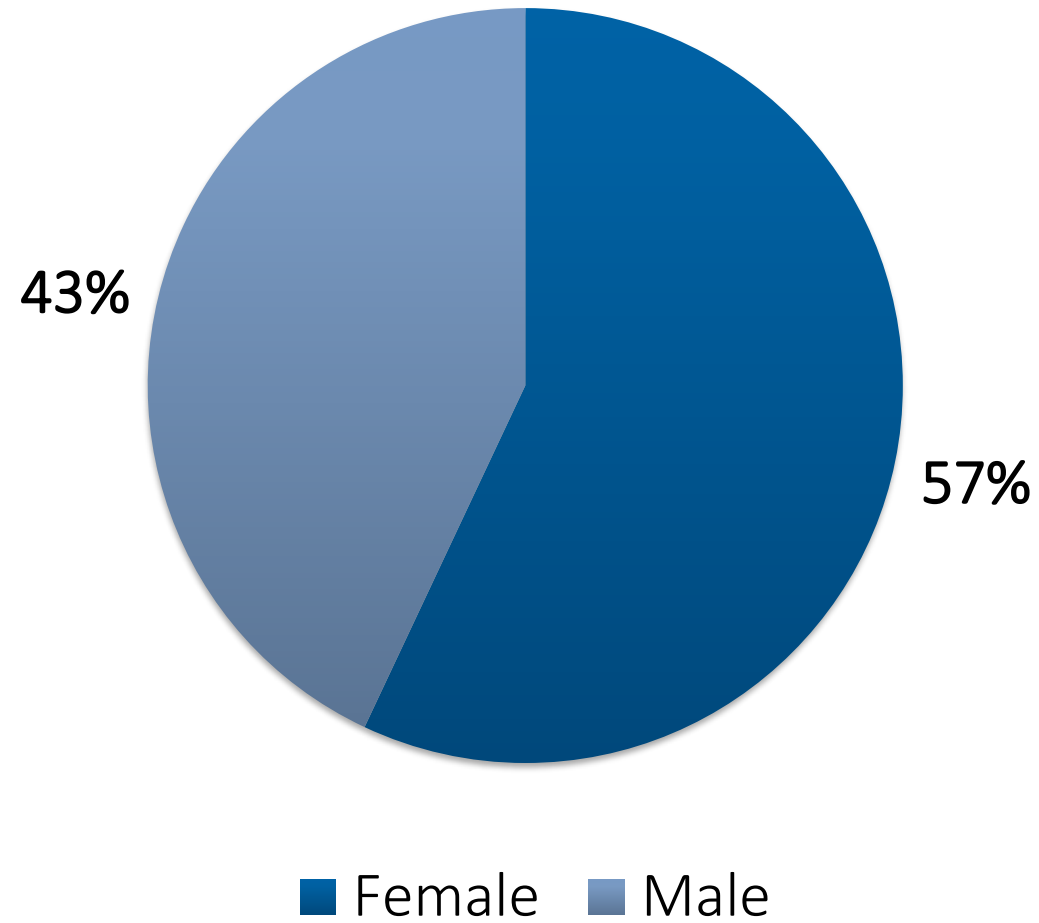
# Age of Fall Visitors



# Total household income in 2017



# Gender

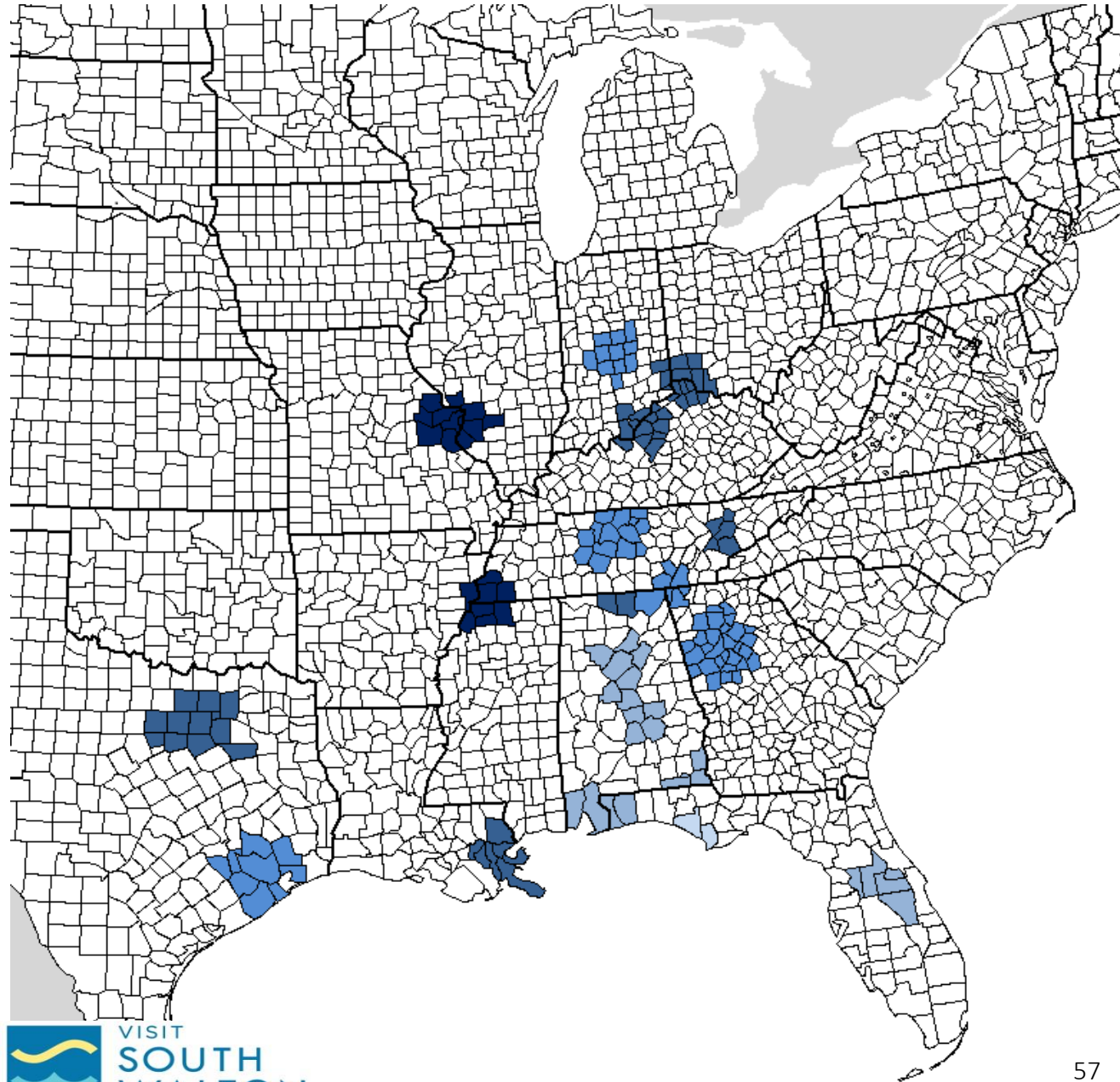


# GIS Maps

# GIS Maps – Visitors for the Past 2 Falls

- Utilizing self-report data from 1,255 Fall visitors to South Walton for the past 2 years, Downs & St. Germain Research developed the following GIS maps that enable the TDC to examine visitation trends and patterns.

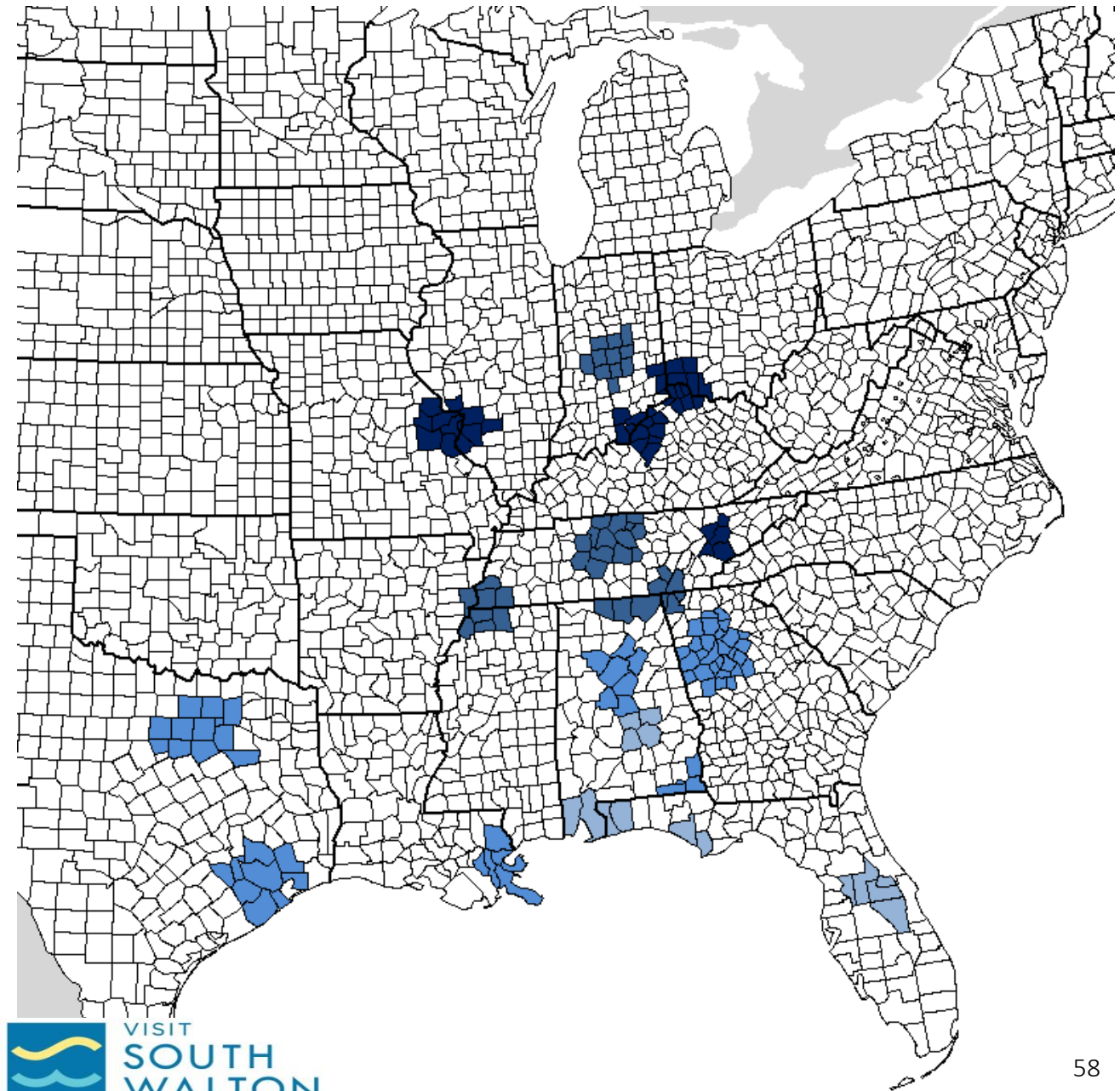
# Spending/Trip – Past 2 Falls<sup>1</sup>



Market	Mean
Memphis	\$ 6,695
St Louis	\$ 6,062
Cincinnati	\$ 5,575
New Orleans	\$ 5,012
Louisville	\$ 4,948
Huntsville	\$ 4,802
Dallas-Ft Worth	\$ 4,402
Knoxville	\$ 4,312
Indianapolis	\$ 3,998
Nashville	\$ 3,992
Houston	\$ 3,836
Atlanta	\$ 3,735
Chattanooga	\$ 3,472
Dothan	\$ 2,896
Pensacola-Mobile	\$ 2,761
Birmingham	\$ 2,386
Montgomery	\$ 2,384
Orlando	\$ 1,611
Panama City-Destin	\$ 755

<sup>1</sup>Most sample sizes are between 25 and 70. Use caution in interpreting results.

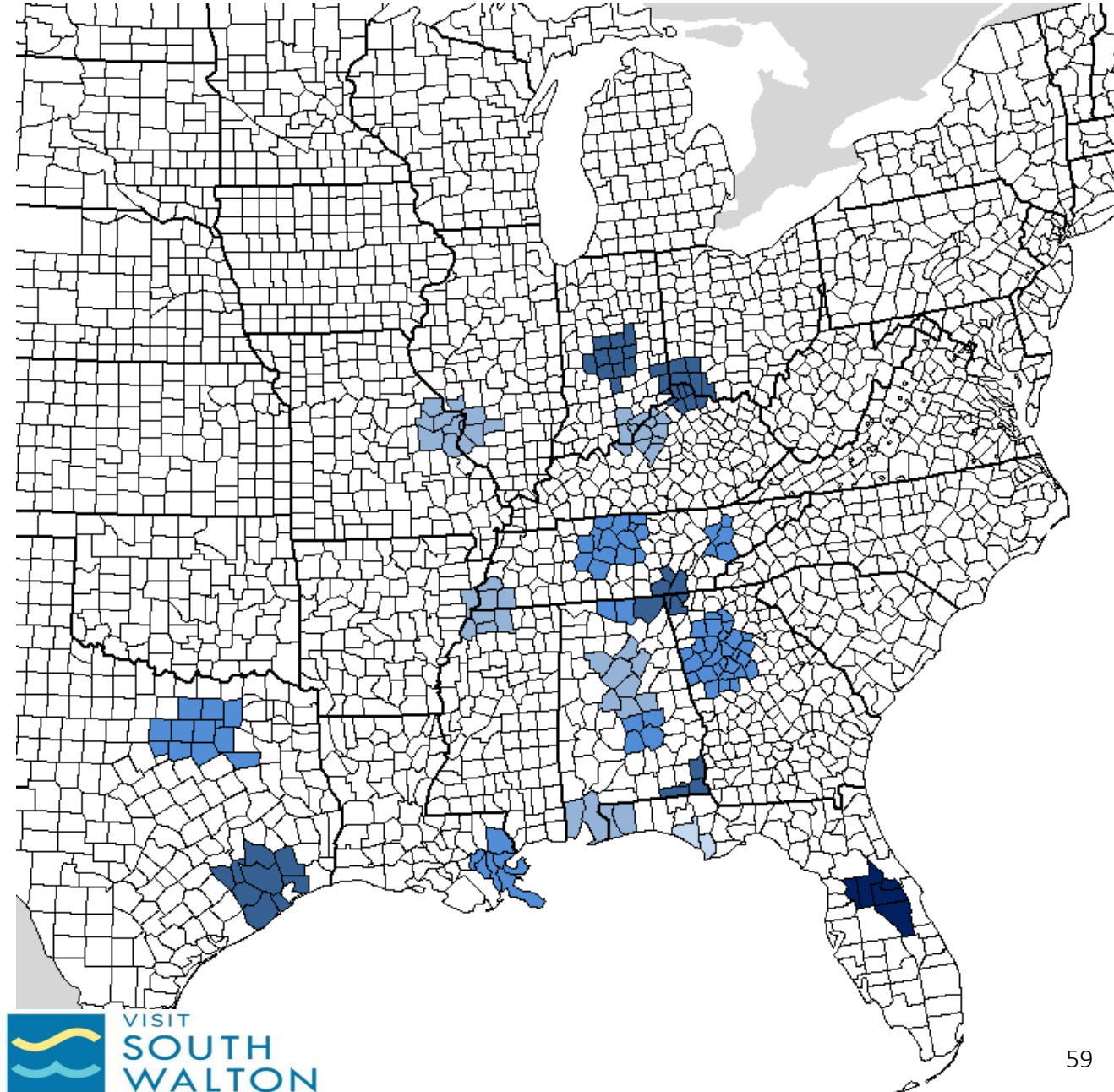
# Length of Trip – Past 2 Falls<sup>1</sup>



Market	Mean
St Louis	8.6
Cincinnati	8.2
Louisville	8.0
Knoxville	7.7
Memphis	6.6
Nashville	6.5
Indianapolis	6.3
Huntsville	6.2
Chattanooga	6.0
Dallas-Ft Worth	5.8
Houston	5.5
Dothan	5.3
Atlanta	5.2
Birmingham	4.8
New Orleans	4.6
Montgomery	3.9
Panama City-Destin	3.7
Orlando	3.6
Pensacola-Mobile	3.1

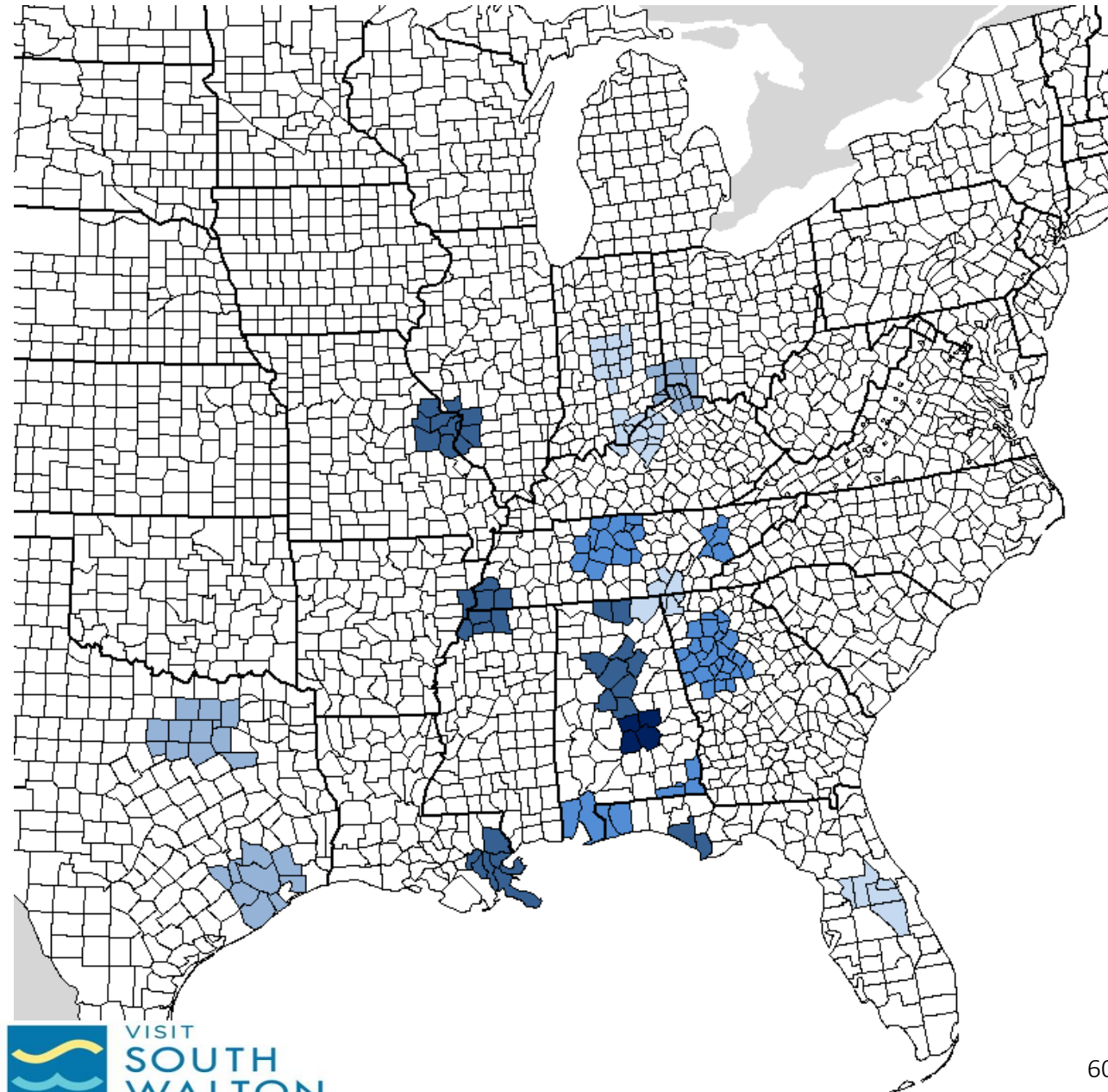
<sup>1</sup>Most sample sizes are between 25 and 70. Use caution in interpreting results.

# 1<sup>st</sup> Time Visitors – Past 2 Falls<sup>1</sup>



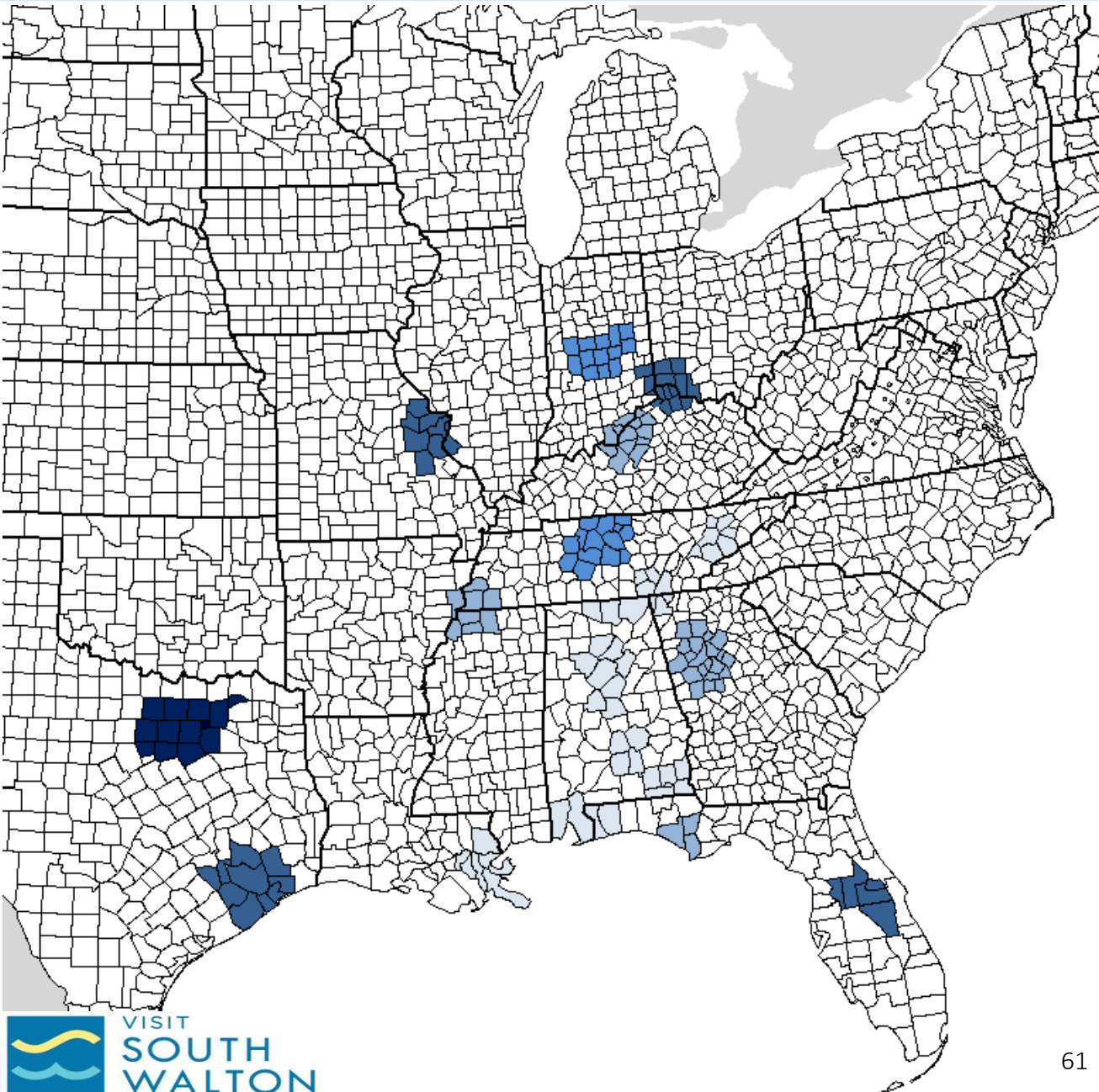
Market	% 1st time visitors
Orlando	43%
Indianapolis	29%
Chattanooga	27%
Cincinnati	24%
Dothan	20%
Houston	20%
Huntsville	17%
Montgomery	17%
Atlanta	16%
Dallas-Ft Worth	14%
Knoxville	13%
New Orleans	13%
Nashville	12%
Pensacola-Mobile	9%
Louisville	8%
Memphis	7%
Birmingham	5%
St Louis	5%
Panama City-Destin	0%

# Loyal Visitors (10+ Visits) – Past 2 Falls<sup>1</sup>



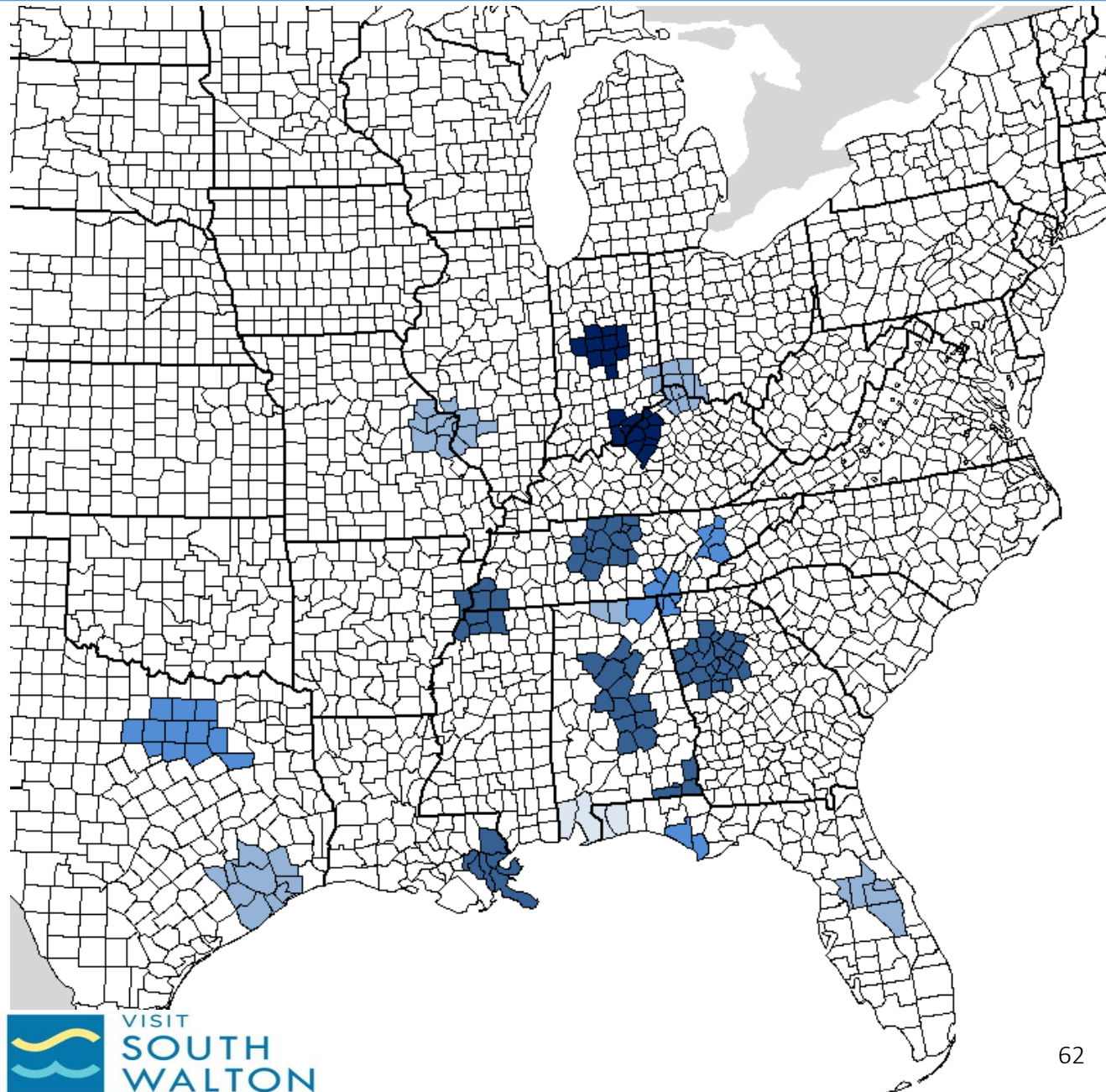
Market	10+ visits
Montgomery	67%
St Louis	58%
Huntsville	52%
Birmingham	51%
New Orleans	51%
Memphis	50%
Panama City-Destin	50%
Atlanta	44%
Knoxville	44%
Nashville	44%
Pensacola-Mobile	43%
Dothan	40%
Cincinnati	36%
Dallas-Ft Worth	32%
Houston	30%
Chattanooga	20%
Louisville	19%
Indianapolis	14%
Orlando	14%

# Visitors who Flew – Past 2 Falls<sup>1</sup>



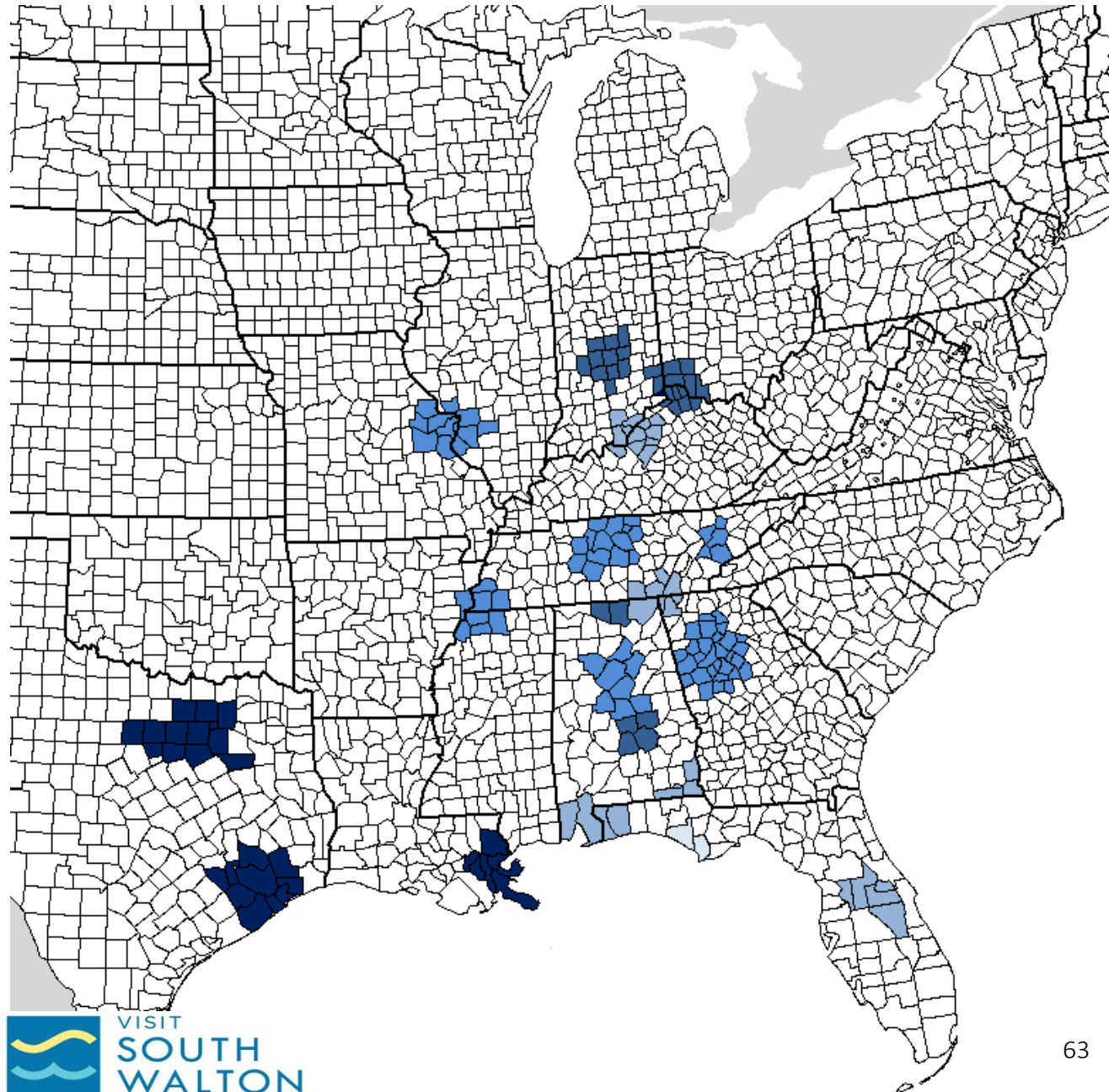
Market	Fly
Dallas-Ft Worth	39%
Cincinnati	24%
St Louis	20%
Houston	18%
Orlando	18%
Indianapolis	14%
Nashville	12%
Atlanta	4%
Louisville	4%
Memphis	4%
Panama City-Destin	0%
Birmingham	0%
Chattanooga	0%
Dothan	0%
Huntsville	0%
Knoxville	0%
Montgomery	0%
New Orleans	0%
Pensacola-Mobile	0%

# Traveling with Children – Past 2 Falls<sup>1</sup>



Market	% with children
Indianapolis	71%
Louisville	69%
Dothan	58%
Montgomery	58%
New Orleans	56%
Atlanta	55%
Memphis	54%
Birmingham	52%
Nashville	51%
Chattanooga	47%
Knoxville	44%
Panama City-Destin	44%
Dallas-Ft Worth	43%
Houston	33%
Huntsville	32%
Orlando	30%
Cincinnati	24%
St Louis	20%
Pensacola-Mobile	8%

# Median Household Income – Past 2 Falls<sup>1</sup>



Market	Median Income
New Orleans	\$209,500
Dallas-Ft Worth	\$200,000
Houston	\$200,000
Montgomery	\$176,500
Indianapolis	\$176,300
Huntsville	\$174,200
Cincinnati	\$170,000
Atlanta	\$153,600
Memphis	\$153,600
Birmingham	\$153,300
St Louis	\$150,000
Nashville	\$148,100
Knoxville	\$143,500
Louisville	\$130,600
Orlando	\$127,800
Dothan	\$125,900
Pensacola-Mobile	\$122,400
Chattanooga	\$100,000
Panama City-Destin	\$55,800



# Visit South Walton Fall 2017 Visitor Tracking Study

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