

WALTON COUNTY TOURISM

Spring 2026 Visitor Tracking Study
March - May 2026



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Visitor Tracking Study

This report is based on 397 internet and in-person surveys of out-of-county guests who stayed at beach communities across Walton County and with visitors at various locations along the beaches between March and May 2026.

KEY PERFORMANCE METRICS



TOURISM SNAPSHOT: KEY PERFORMANCE METRICS



1,395,300

TOTAL
VISITORS

vs. 2025

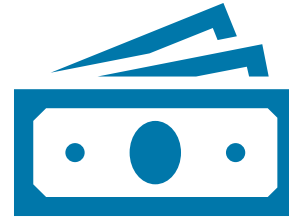
↑ 7.0%



1,050,100

ROOM
NIGHTS

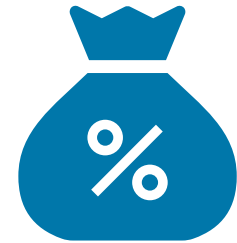
↑ 3.9%



\$1,208,372,400

DIRECT
SPENDING

↑ 5.5%



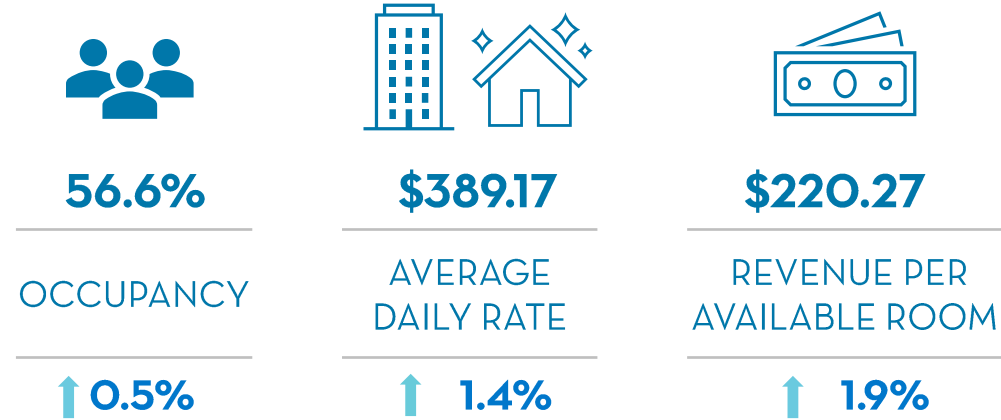
\$19,303,379

TOURISM
DEVELOPMENT TAX

↑ 11.0%

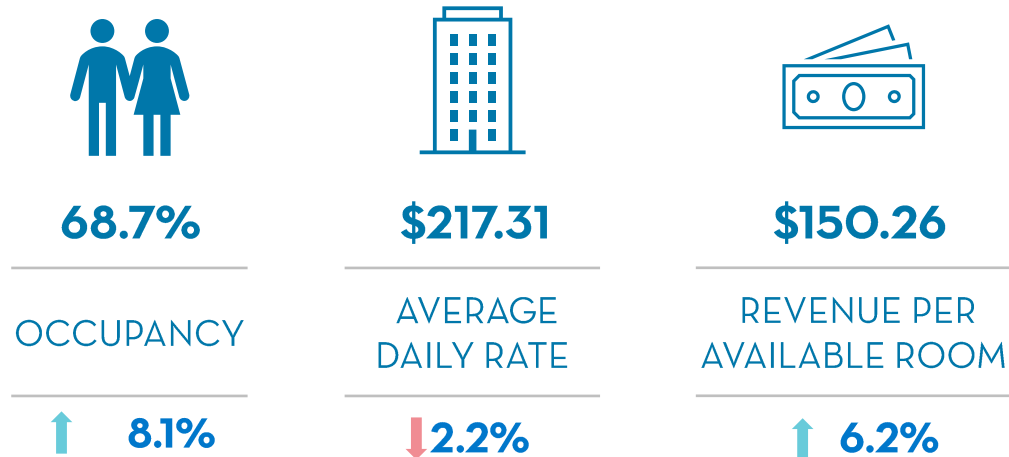
TOURISM SNAPSHOT: LODGING METRICS¹

COMBINED

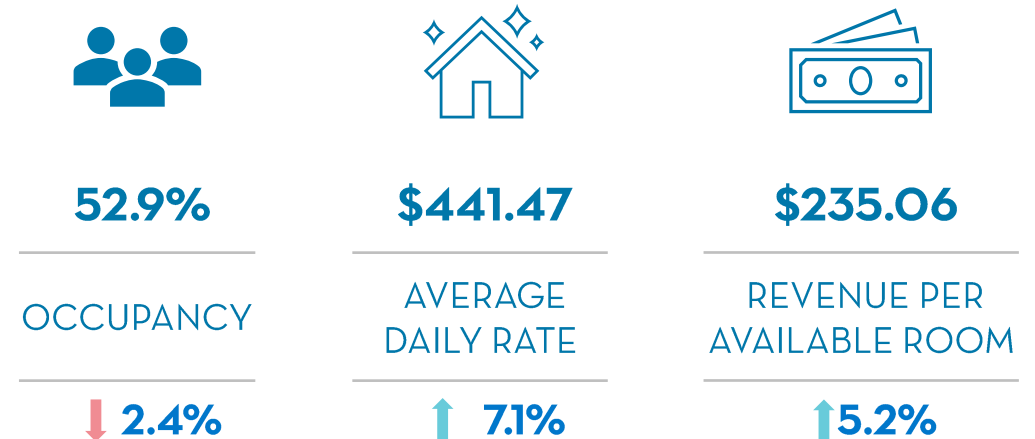


¹Airbnb (effective April 30, 2025) and Vrbo (effective May 30, 2025) have updated how rates are quoted through their platforms. The ADR now includes cleaning fees, platform service fees, and applicable discounts (e.g., weekly or monthly stay discounts). Therefore, the ADR of vacation rentals may appear inflated in YOY comparisons now that Key Data is capturing the inclusive price (excluding taxes) rather than the base accommodation rate.

HOTELS²



VACATION RENTALS³



VISITOR PROFILE SUMMARY



SPRING 2026 VISITOR PROFILE



54

Median Age

17%

First-time Visitor

\$180,600

Median Household Income

57%

Traveled with Children
under the age of 20

4.5

Travel Party Size

6.1

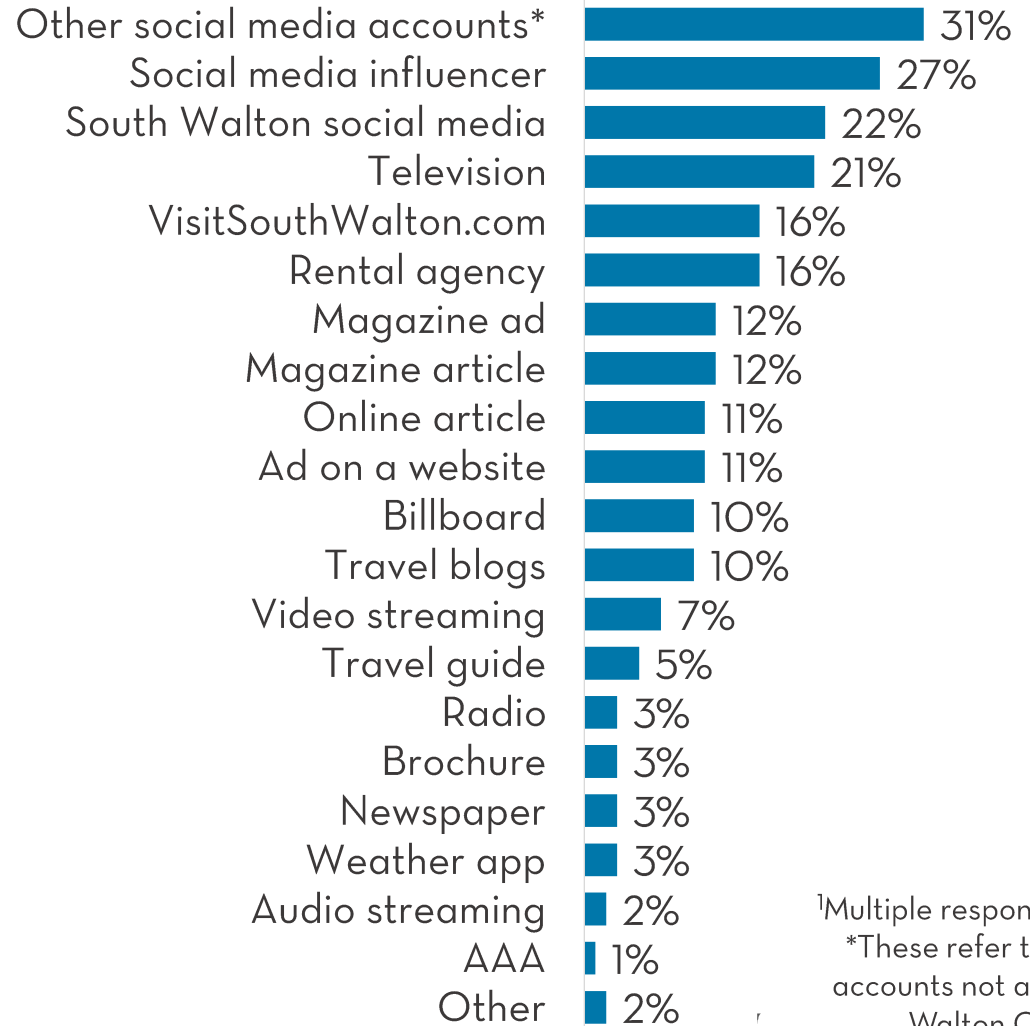
Length of Stay

WALTON COUNTY PROMOTIONS¹

Insights:

- » Nearly 3 in 10 Spring visitors recalled seeing promotions for Walton County before their trip, a decrease of 1% point compared to Spring 2025.
- » The percentage of visitors who were influenced by ads and promotions increased 2% points year-over-year.
- » Ad recall from social media increased from other social media accounts (4% points) and social media influencers (5% points) compared to Spring 2025.

Base: **28%** of visitors who recall advertising



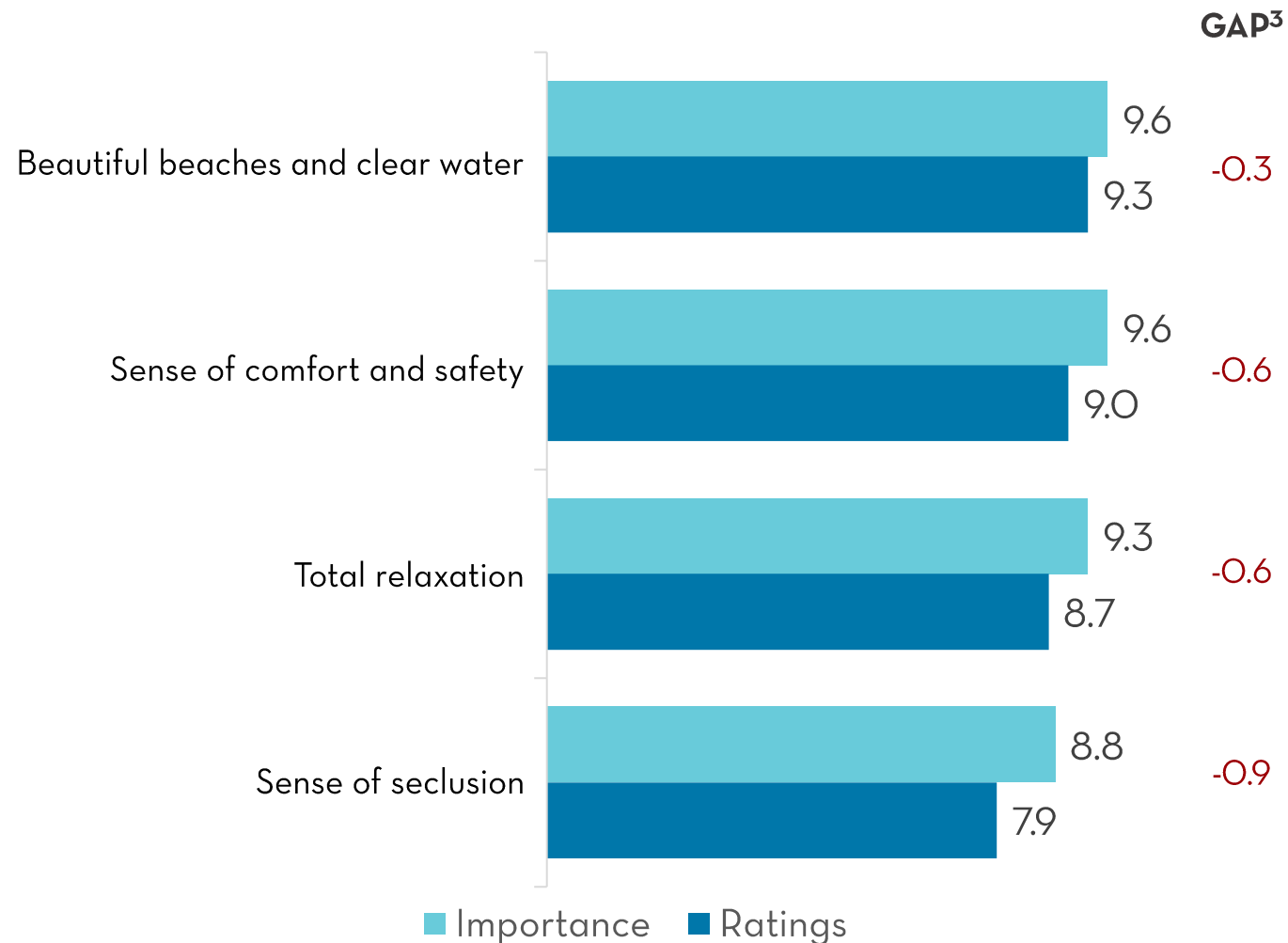
¹Multiple responses permitted.

*These refer to social media accounts not associated with Walton County Tourism

VACATION ATTRIBUTE IMPORTANCE¹ VS. RATINGS²

Insights:

- » Consistent with Walton County's brand, "beautiful beaches and clear water" and "sense of comfort and safety" ranked highest in both importance and visitor ratings.
- » Though highly rated, the 4 most important attributes to visitors were the only attributes to receive negative GAP scores.



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

² Rated on a scale from 1 to 10 where 10 is excellent and 1 is poor.

³ GAP equals the difference between the importance of an attribute and the rating of WC on that attribute.

For example, a "Beautiful beaches and clear water" is extremely important to visitors with a score of 9.6. Visitors rated WC as 9.3 on its beaches. Hence, the GAP is -0.3.

ORIGIN OF SPRING VISITORS

Insights:

- » Over 6 in 10 Spring visitors to Walton County are from the Southeast, not including Florida.
- » Nearly half of Spring visitors are from Georgia, Texas, Tennessee, or Alabama.
- » While the share of visitors from the Southeast decreased 4.8% points from 2025, the share from the international market increased 1.4% points.

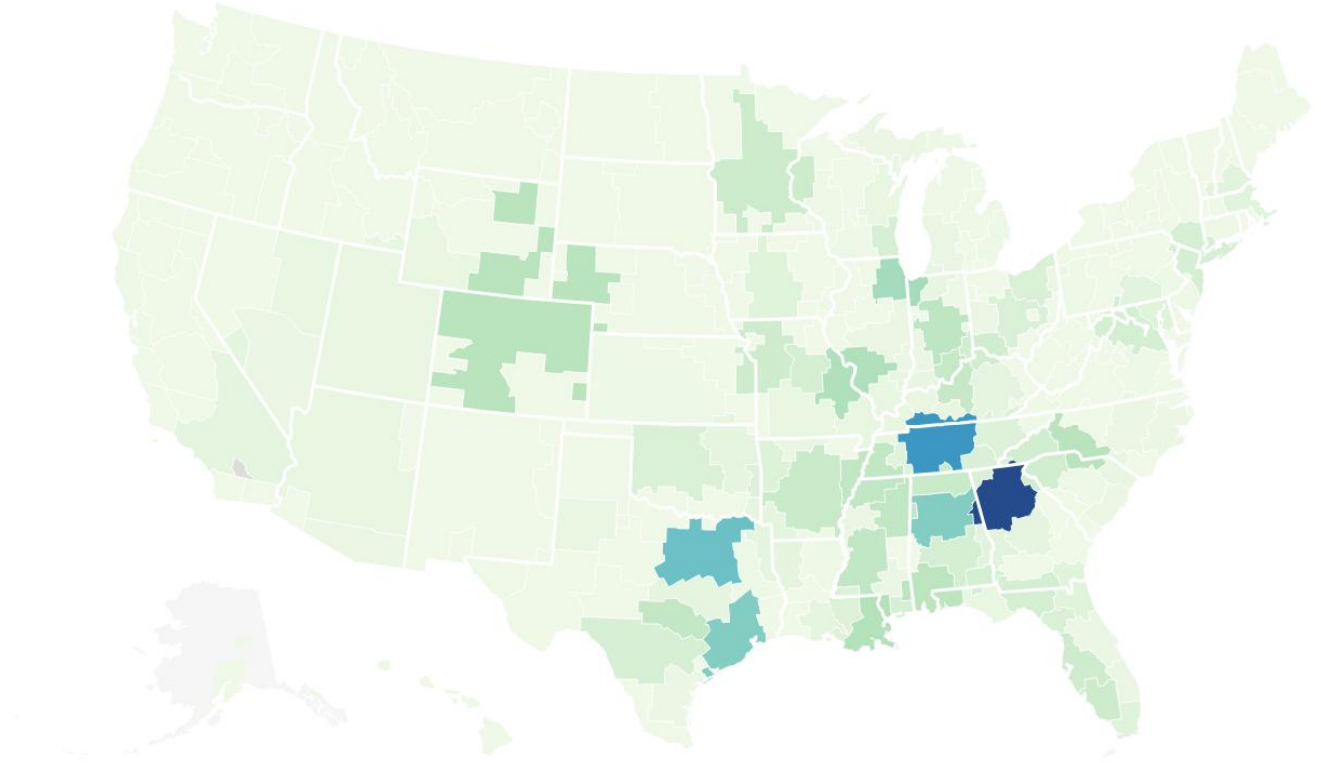
REGION		STATE	
Southeast	62.3%	Georgia	14.1%
Midwest	21.1%	Texas	12.6%
Florida	6.3%	Tennessee	10.6%
Northeast	3.8%	Alabama	8.8%
West	4.4%	Florida	6.3%
International	2.2%	Mississippi	5.8%

ORIGIN OF SPRING VISITORS

Insights:

- » Nearly 1 in 3 Spring visitors are from the Atlanta, Nashville, Dallas-Fort Worth, Houston, and Birmingham markets.
- » While Atlanta and Dallas-Fort Worth saw year-over-year increases in the number of visitors.
- » Other markets including Charlotte and Denver also experienced year over year increases.

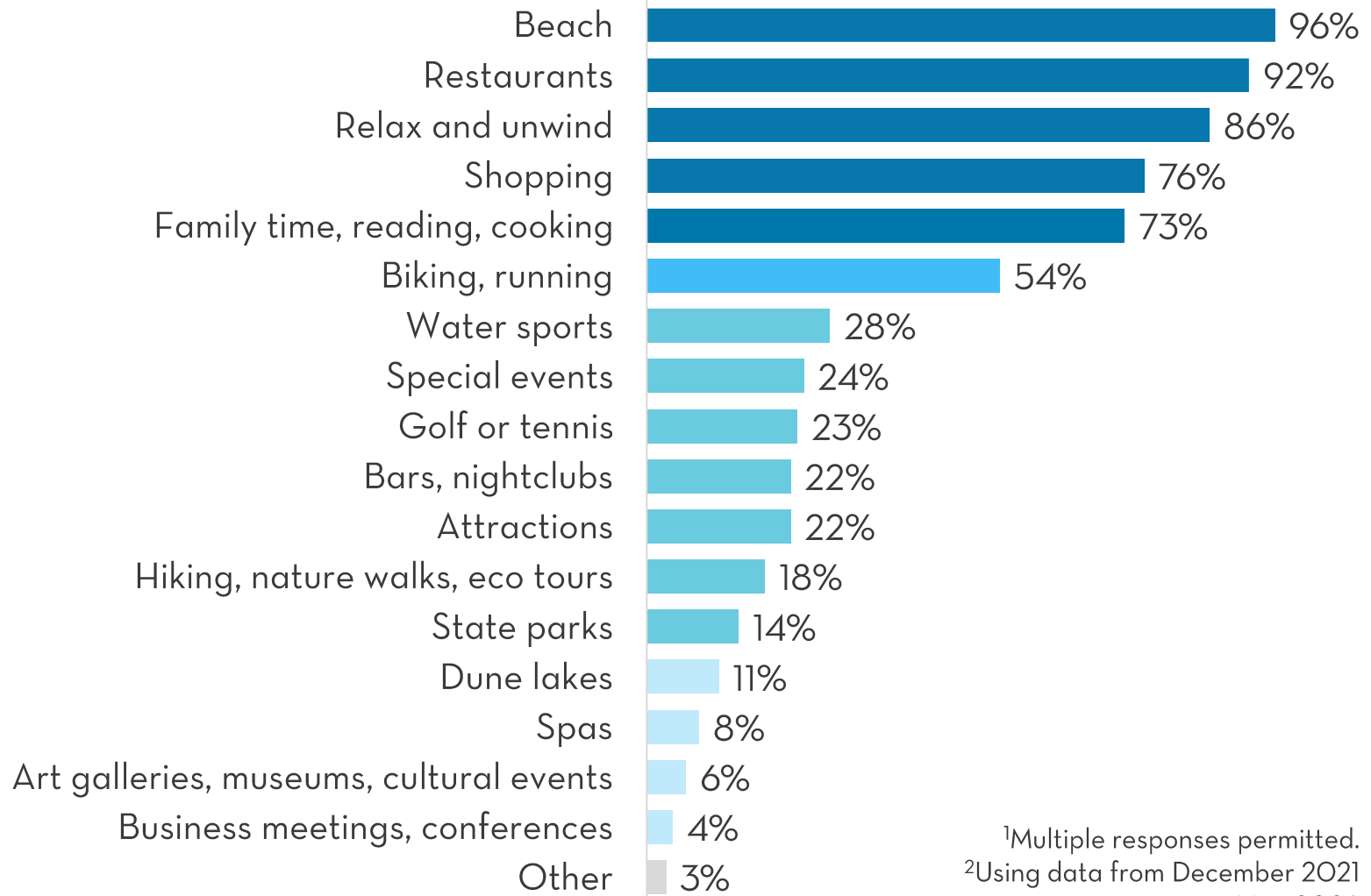
WCT Spring Origin Markets



Created with Datawrapper

VISITOR ACTIVITIES¹

- » Top activities for spring visitors includes spending time at the beach, dining out at restaurants, relaxing/unwinding, shopping, and enjoying time together with family
- » The beach, relaxing/unwinding, shopping, family time/reading/cooking, attractions, dune lakes, and spas all saw increases from Spring 2025.



¹Multiple responses permitted.

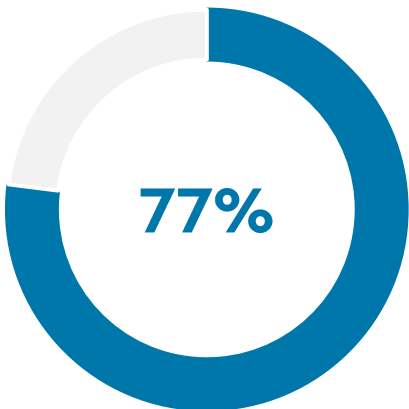
²Using data from December 2021 to May 2026

SATISFACTION METRICS



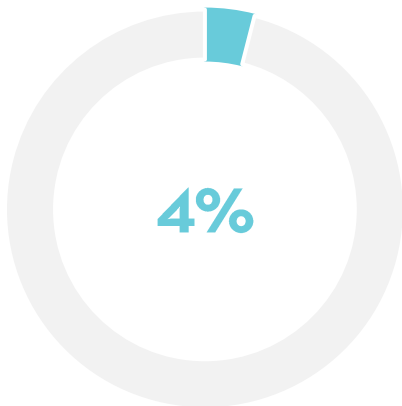
Highly Rated

Visitors gave Walton County a rating of 9.2 out of 10 (+0.1 points from 2025) as a place to vacation



Definitely Return

77% of visitors said they would definitely return to Walton County



Uncertain About Returning

2% of visitors were uncertain of whether they would return or not

Only 4% of visitors are uncertain about returning. Those who were uncertain about returning to Walton County gave the following reasons:

- 1. **Parking was a concern**
- 2. **Too crowded**

Reason for uncertainty about returning to Walton County should be interpreted cautiously due to the small sample size answering the question.

VISITOR DESCRIPTIONS OF WALTON COUNTY

"A safe place to bring kids and grandparents. It's wonderful."



"Top of our list of favorite beaches."

"Feels very clean and safe."



YEARLY COMPARISONS



VISITOR PROFILE – SPRING 2025 VS. 2026

Visitor Metrics	Spring 2025	Spring 2026
Travel party	4.7	4.5
Kids <20	54%	57%
Median age	54	54
Estimated median household income	\$165,400	\$180,600
Drove	73%	70%
Nights stayed¹	6.3	6.1
Direct expenditures (travel party for entire trip)	\$4,360	\$4,073
1st time visitor	15%	17%
Over 10 visits to Walton County	37%	38%

¹ Visitors staying 30 days or fewer.

VISITOR PROFILE – SPRING 2025 VS. 2026

Top Origin States	Spring 2025	Spring 2026
Georgia	13.7%	14.1%
Texas	12.0%	12.6%
Tennessee	12.2%	10.6%
Alabama	10.3%	8.8%
Florida	4.4%	6.3%

Origins - Regions	Spring 2025	Spring 2026
Southeast	67.1%	62.3%
Midwest	22.0%	21.1%
Florida	3.9%	6.3%
Northeast	2.1%	3.8%
West	4.1%	4.4%
International	0.8%	2.2%

VISITOR PROFILE – SPRING 2025 VS. 2026

Top Visitor Activities	Spring 2025	Spring 2026
Beach	95%	96%
Restaurants	94%	92%
Relax and unwind	85%	86%
Shopping	75%	76%
Family time, reading, cooking	69%	73%
Biking, running	57%	54%
Water sports	35%	28%
Special events	24%	24%
Golf or tennis	24%	23%
Bars, nightclubs	24%	22%
Attractions	20%	22%
Hiking, nature walks, eco tours	22%	18%
State parks	16%	14%
Dune lakes	9%	11%
Spas	7%	8%
Art galleries, museums, cultural events	8%	6%
Business meetings, conferences	4%	4%
Other	3%	3%

VISITOR PROFILE – SPRING 2025 VS. 2026

Visitor Metrics	Spring 2025	Spring 2026
Will return to Walton County¹	95%	94%
Rating for overall experience²	9.1	9.2
Viewed Visitors Guide³	24%	18%
Planned trip 6+ months out	21%	28%
Used VisitSouthWalton.com	12%	10%
Used 1 of 16 beaches' websites	15%	16%
Use the term “South Walton”	10%	11%

¹ Includes “Definitely will return” and “Probably will return”.

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

³ 15% used the online version & 3% used the print version.

DETAILED FINDINGS



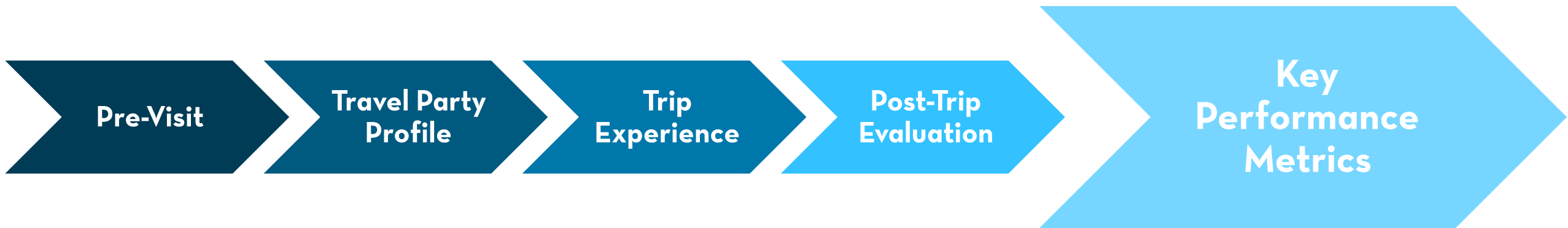
STUDY OBJECTIVES: MAP THE VISITOR JOURNEY

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



VISITOR JOURNEY: KEY PERFORMANCE METRICS

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



KEY PERFORMANCE METRICS- SPRING 2026 VS. 2025

- » With over 1 million visitors this Spring, total visitor spending was over \$1.2 billion.
- » An increase in occupancy and an increase in ADR led to an increase in RevPAR.
- » Direct spending was up year-over-year due to an increase in daily travel party spending.

Visitor Metrics	Spring 2025	Spring 2026	% Δ
Room nights	1,011,100	1,050,100	+3.9%
Total visitors	1,303,900	1,395,300	+7.0%
TDT collections	\$17,391,562	\$19,303,379	+11.0%
Direct spending	\$1,145,805,400	\$1,208,372,400	+5.5%
Occupancy	56.3%	56.6%	+0.5%
Average Daily Rate	\$383.81	\$389.17	+1.4%
RevPAR	\$216.09	\$220.27	+1.9%

Data sources: Walton County Clerk of Courts & County Comptroller, properties in Walton County that rent to visitors, Key Data, and visitor and property surveys by Downs & St. Germain Research.

LODGING METRICS¹

56.6%

Occupancy

↑ 0.5%

\$389.17

ADR

↑ 1.4%

\$220.27

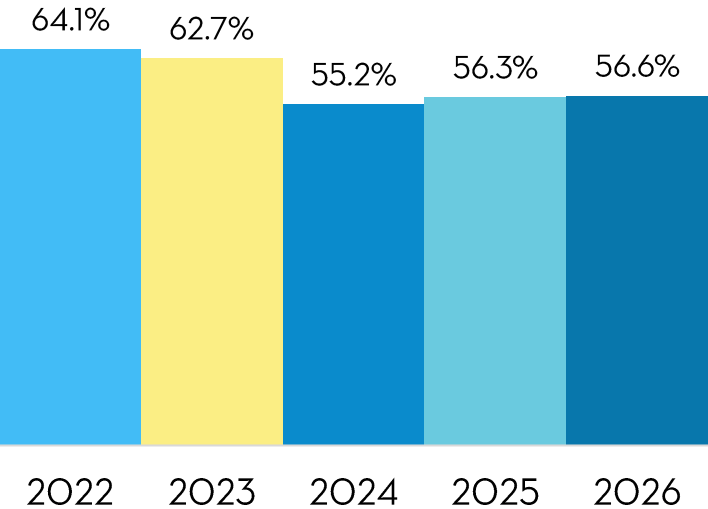
RevPAR

↑ 1.9%

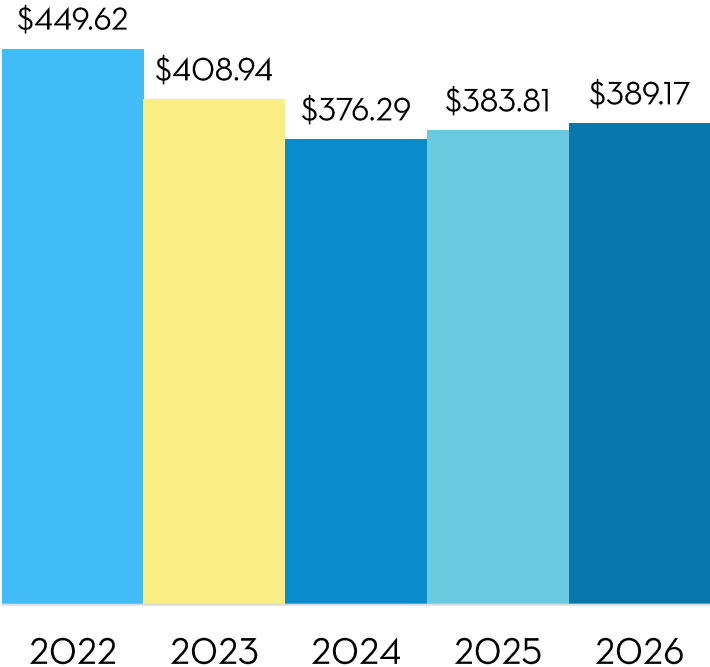
¹Combined lodging metrics includes hotel and vacation rental data.

5-YEAR OVERVIEW – SPRING LODGING METRICS¹

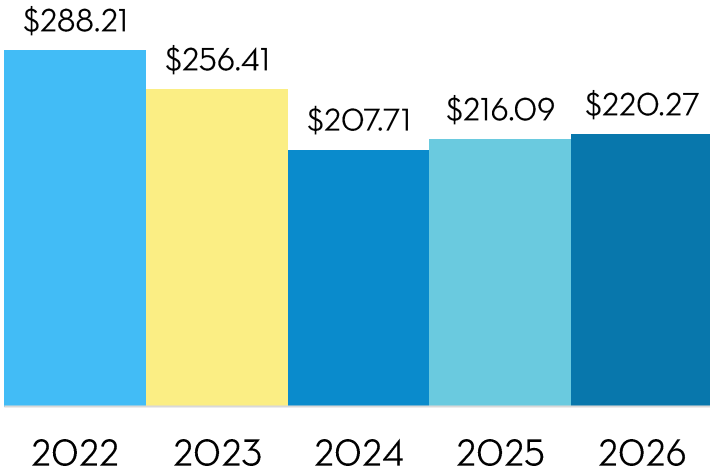
Occupancy Rate



Average Daily Rate



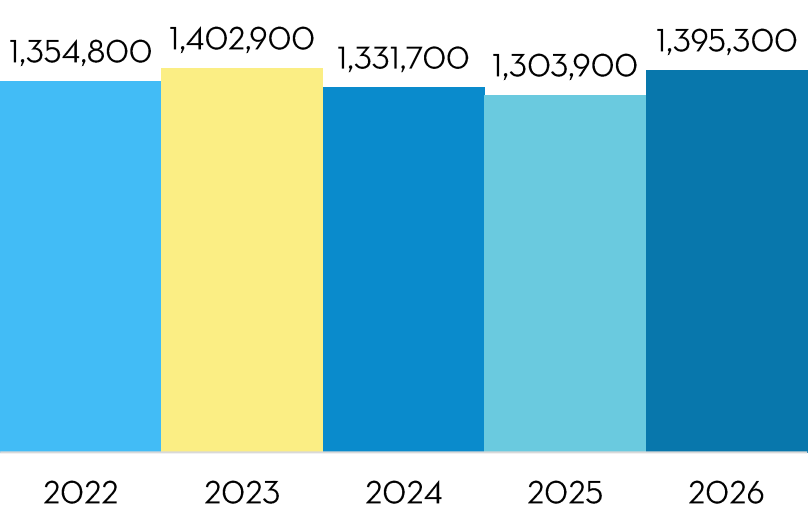
Revenue per Available Room



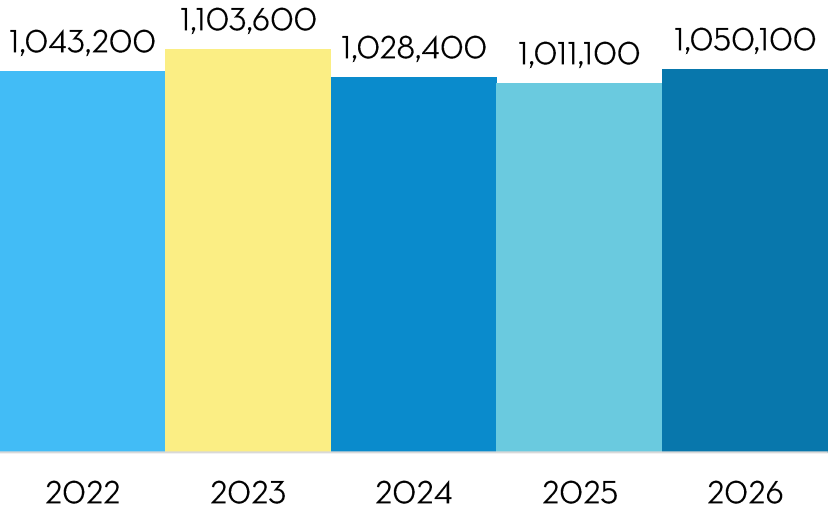
¹ Combined lodging metrics includes hotel and vacation rental data.

5-YEAR OVERVIEW – SPRING TOURISM METRICS

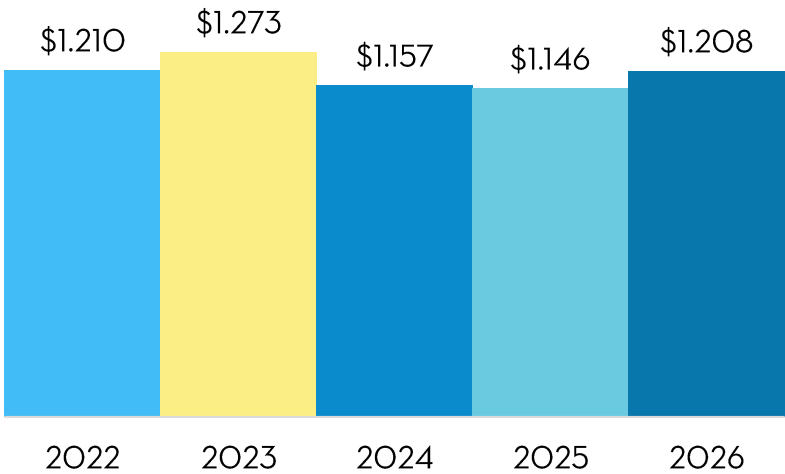
Visitors



Room Nights



Direct Spending
(billions)



VISITOR JOURNEY: PRE-VISIT



PLANNING CYCLE



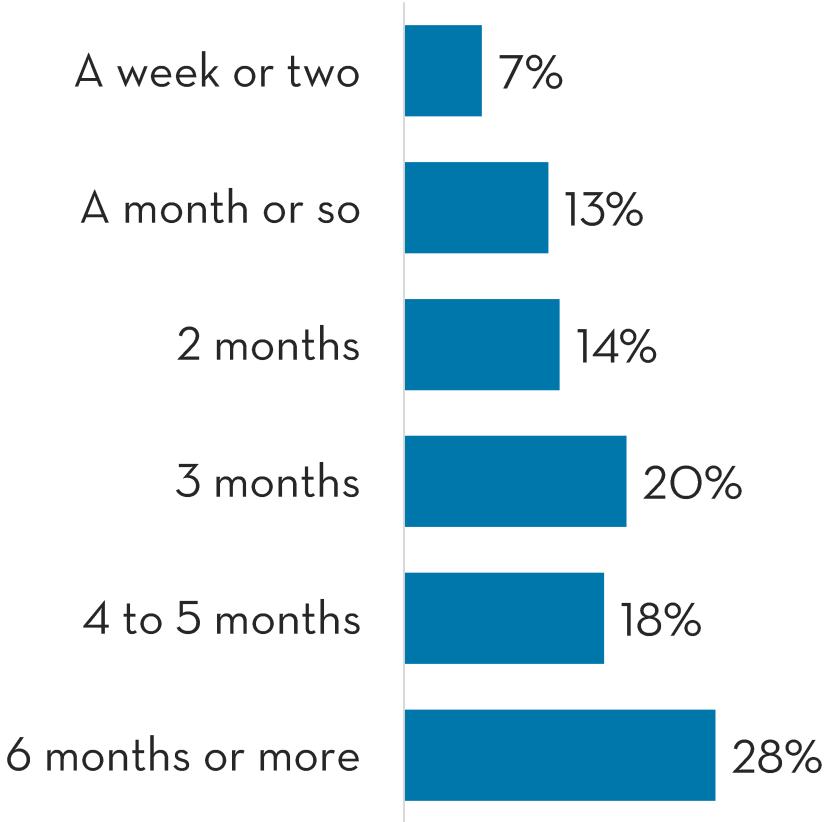
2 in 3 visitors plan a Walton County Spring vacation at least **3 months** in advance



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



Typical trip planning cycle begins **103 days** before the trip (101 days in 2025)



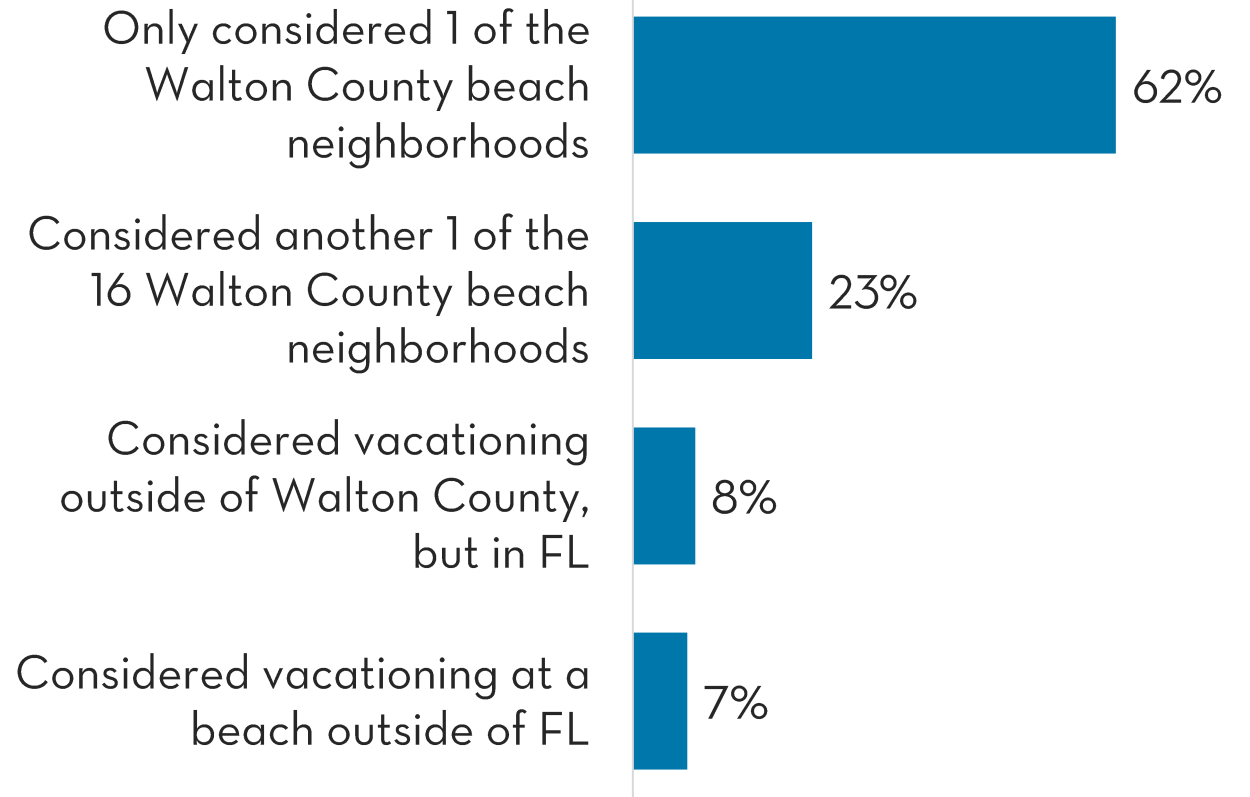
OTHER DESTINATIONS CONSIDERED



Nearly 2 in 3 (-2% points from 2025) Spring visitors only consider going to the Walton County beach neighborhoods where they stay



11% (+1% points from 2025) use the term “South Walton” when referring to the area

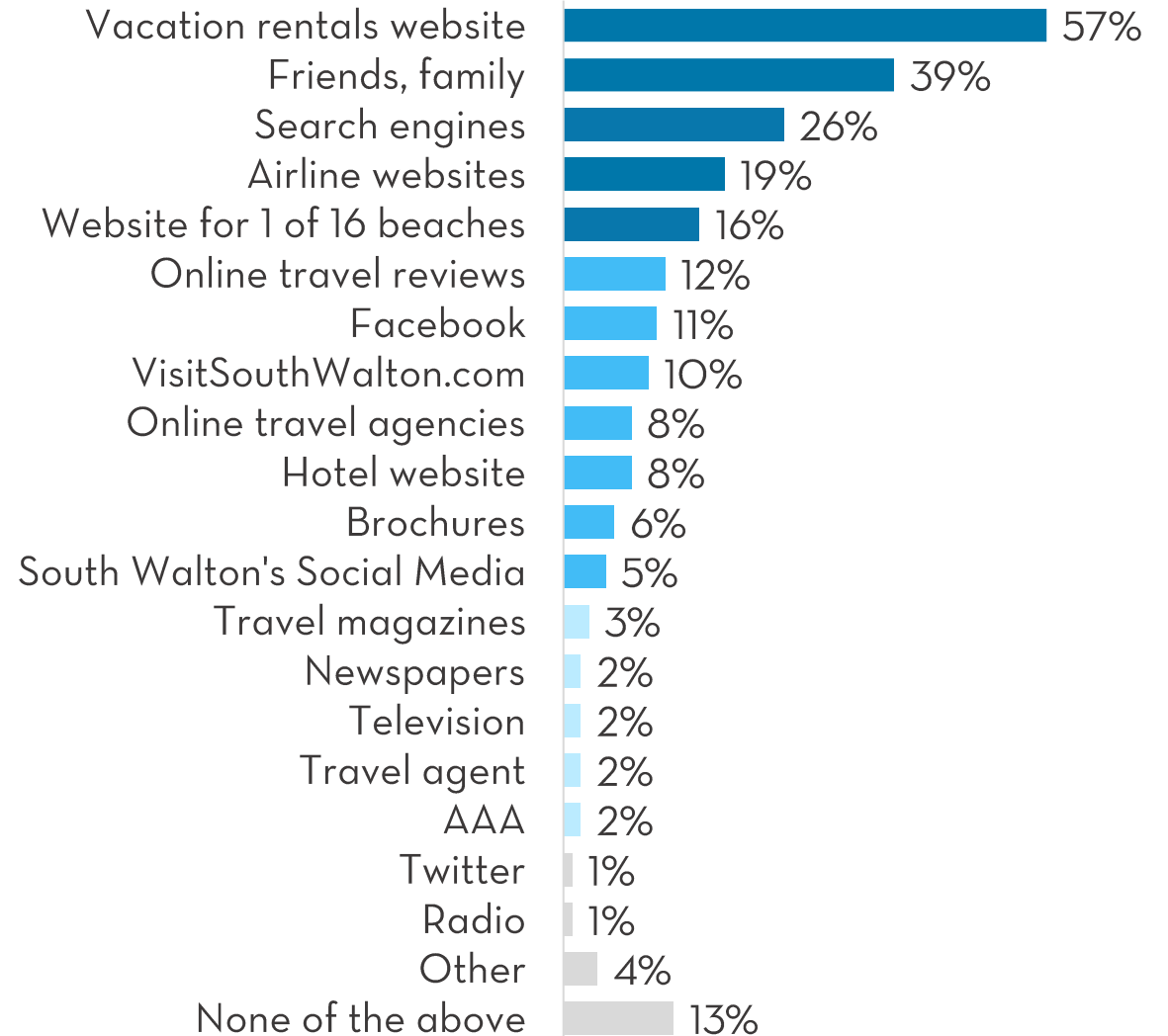


TRIP PLANNING SOURCES¹

Nearly 3 in 5 visitors use a vacation rental website to help plan their trip to Walton County

Nearly 2 in 5 visitors ask their friends and family for advice to help plan their trip to Walton County

Over 1 in 4 visitors use a search engine to help plan their trip to Walton County

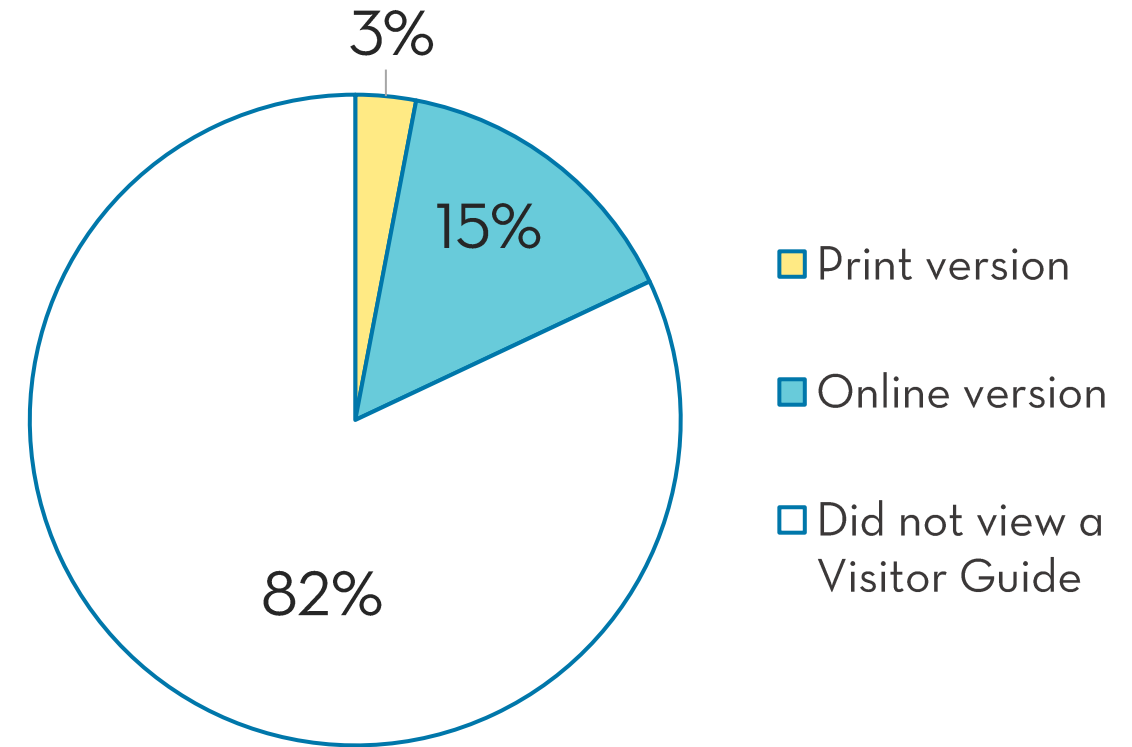


¹ Multiple responses permitted.

WALTON COUNTY VISITOR GUIDE

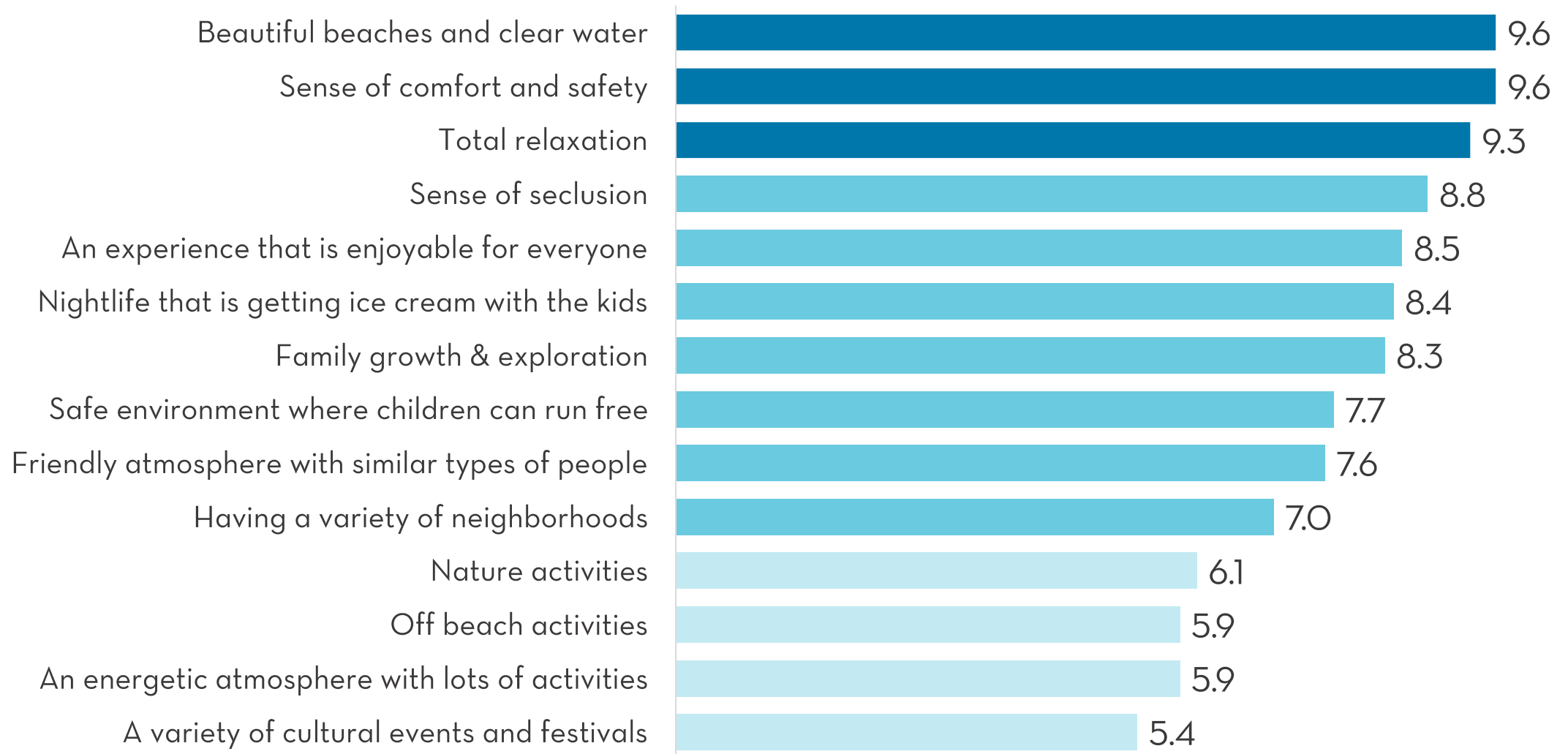
Nearly 1 in 5 visitors view a Walton County Visitor Guide before going to the area (-6% points from 2025)

Spring visitors give the Visitor Guide a rating of **8.9 out of 10¹** (8.8 in 2025)



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

IMPORTANT VACATION DESTINATION ATTRIBUTES¹



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

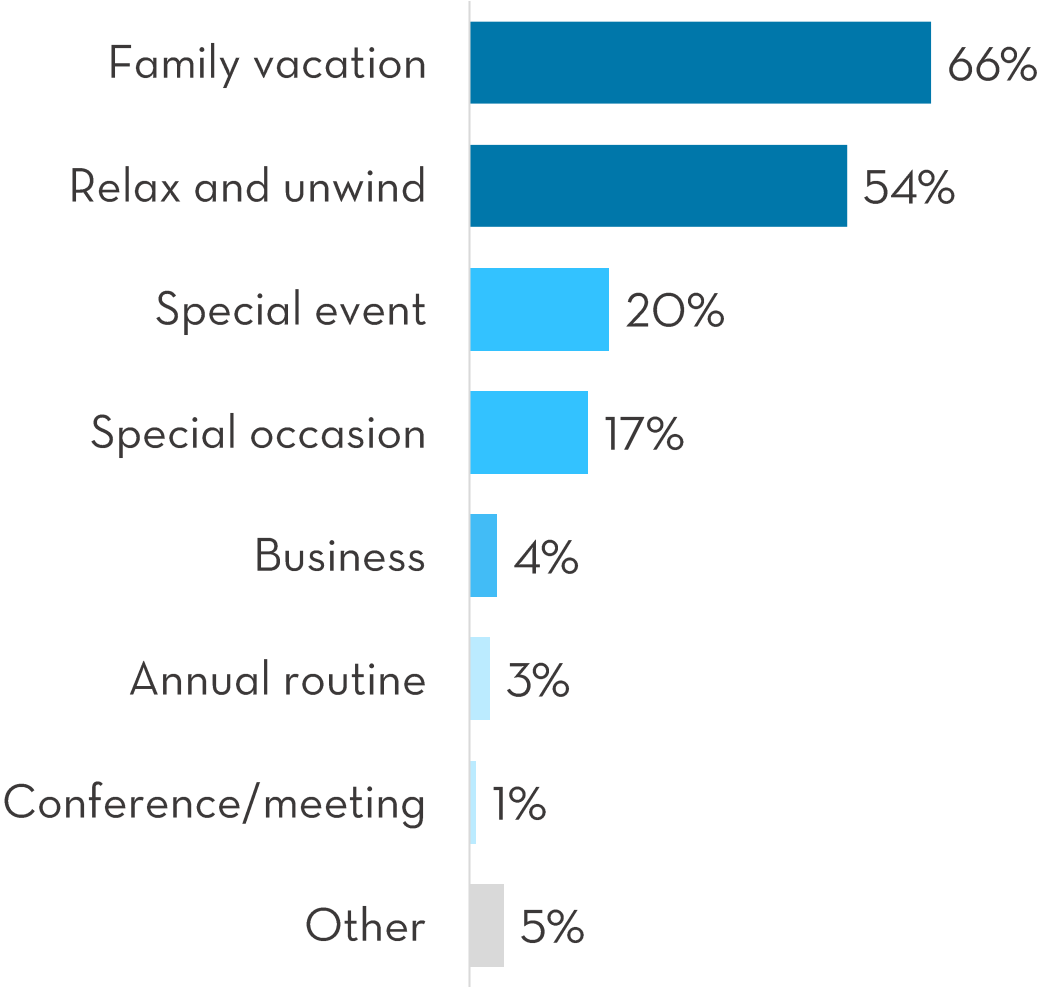
REASONS FOR VISITING¹



2 in 3 Spring visitors come for a **family vacation**



Over half of visitors come to Walton County to **relax and unwind**



¹Multiple responses permitted.

WALTON COUNTY PROMOTIONS¹



28% (-1% point from 2025) of Spring visitors recall advertising, promotions, or travel stories for Walton County

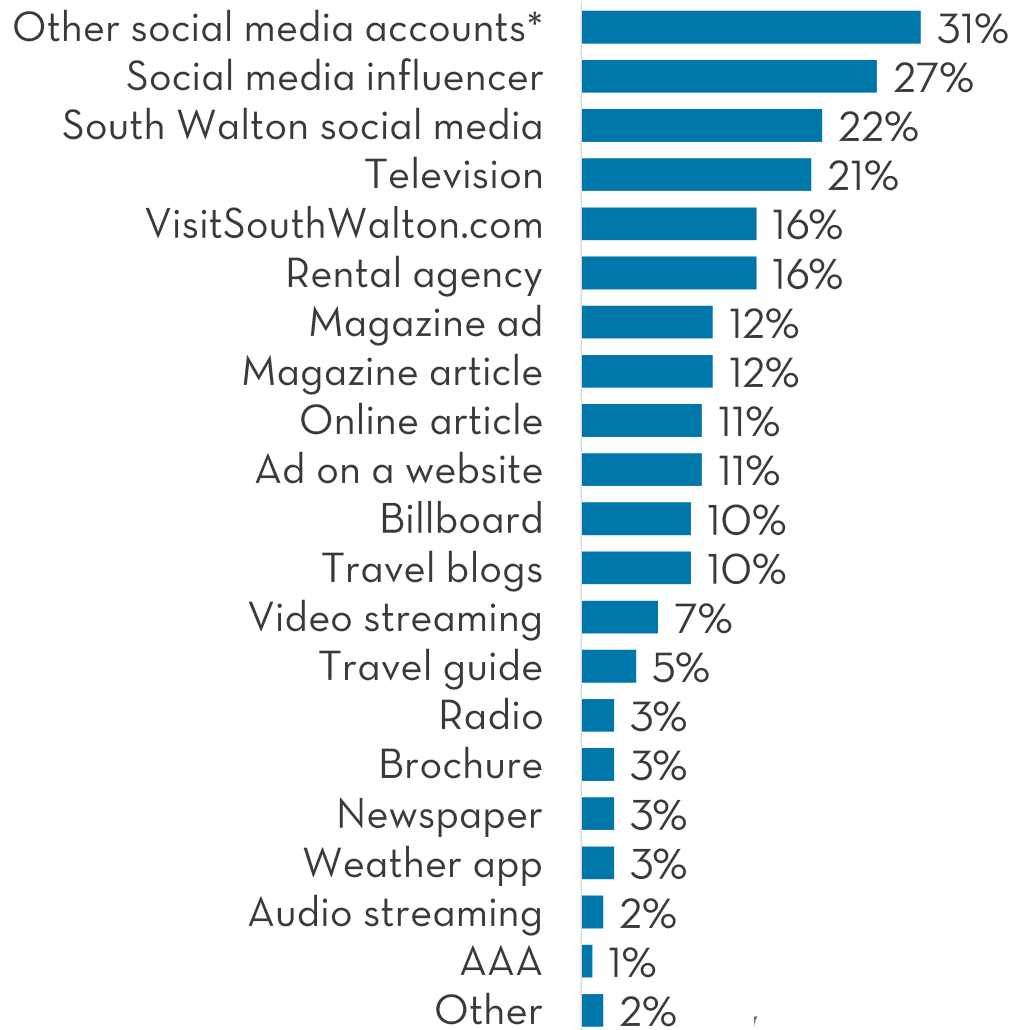


This information influences **9%** (+1% point from 2025) of all visitors to visit Walton County



Ad recall from **other social media accounts increased 4% points** from 2025.

Base: **28%** of visitors who recall advertising



¹Multiple responses permitted.

*These refer to social media accounts not associated with Walton County Tourism.

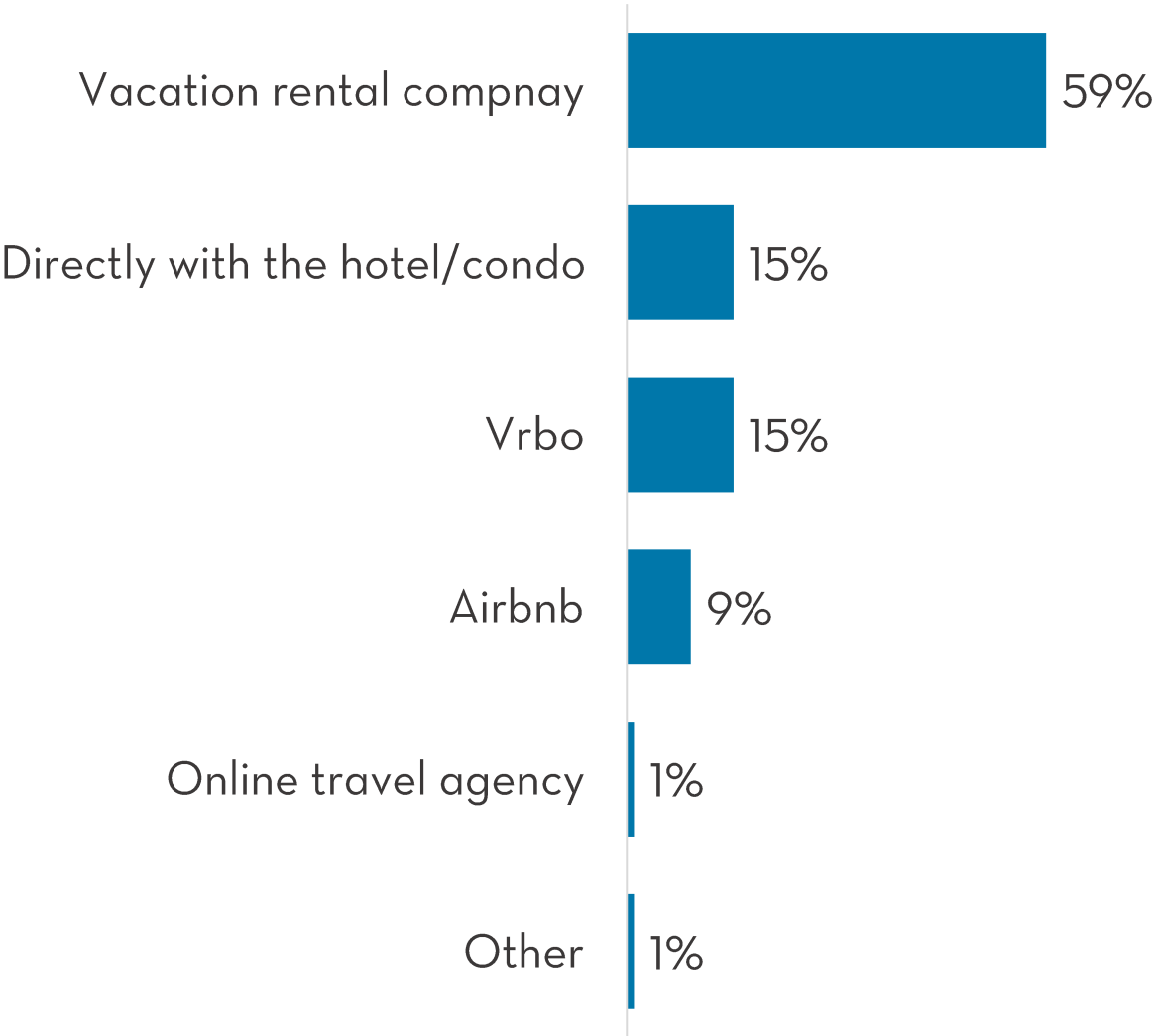
BOOKING ACCOMMODATIONS



Nearly 3 in 5 visitors book accommodations through a **vacation rental company**



About 1 in 7 Spring visitors book **directly with a hotel/condo or Vrbo**



VISITOR TRANSPORTATION

The **30%** of visitors who **fly** use the following airports:



70% (-3% points from 2025) of Spring visitors drive to Walton County



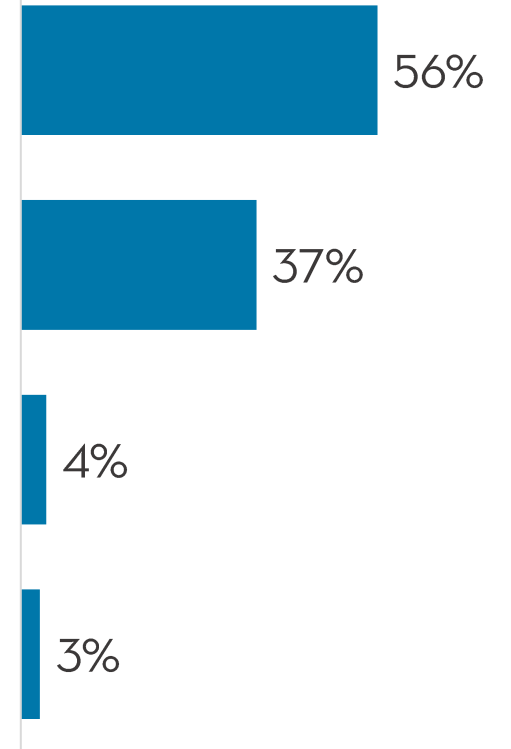
32% (+4% points from 2025) of those who drive are aware that there are direct flights from their city to the Walton County area, and **31%** are not sure if there are direct flights available

Northwest Florida Beaches International Airport (ECP)

Destin-Fort Walton Beach Airport (VPS)

Pensacola International Airport (PNS)

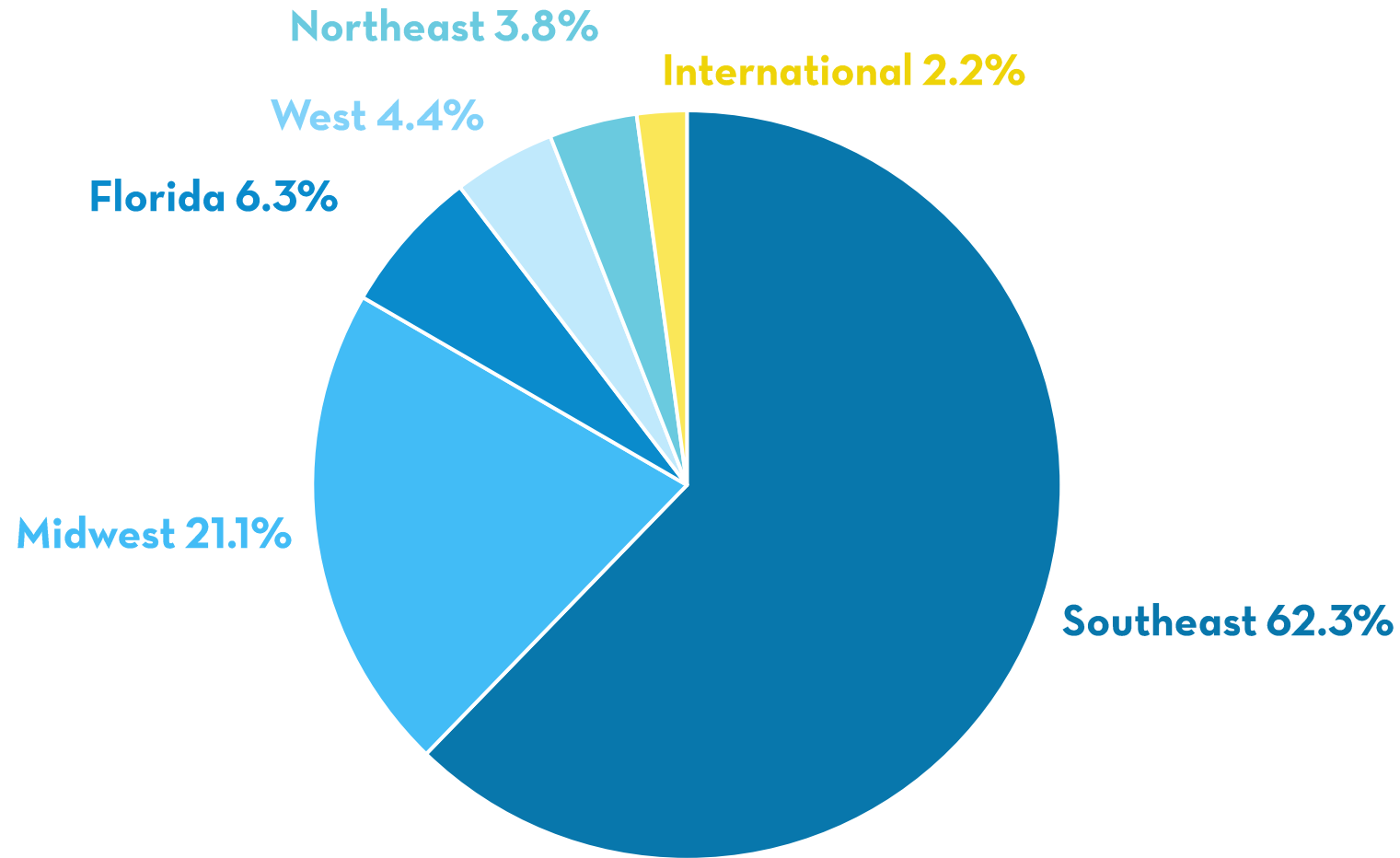
Other



VISITOR JOURNEY: TRAVEL PARTY PROFILE

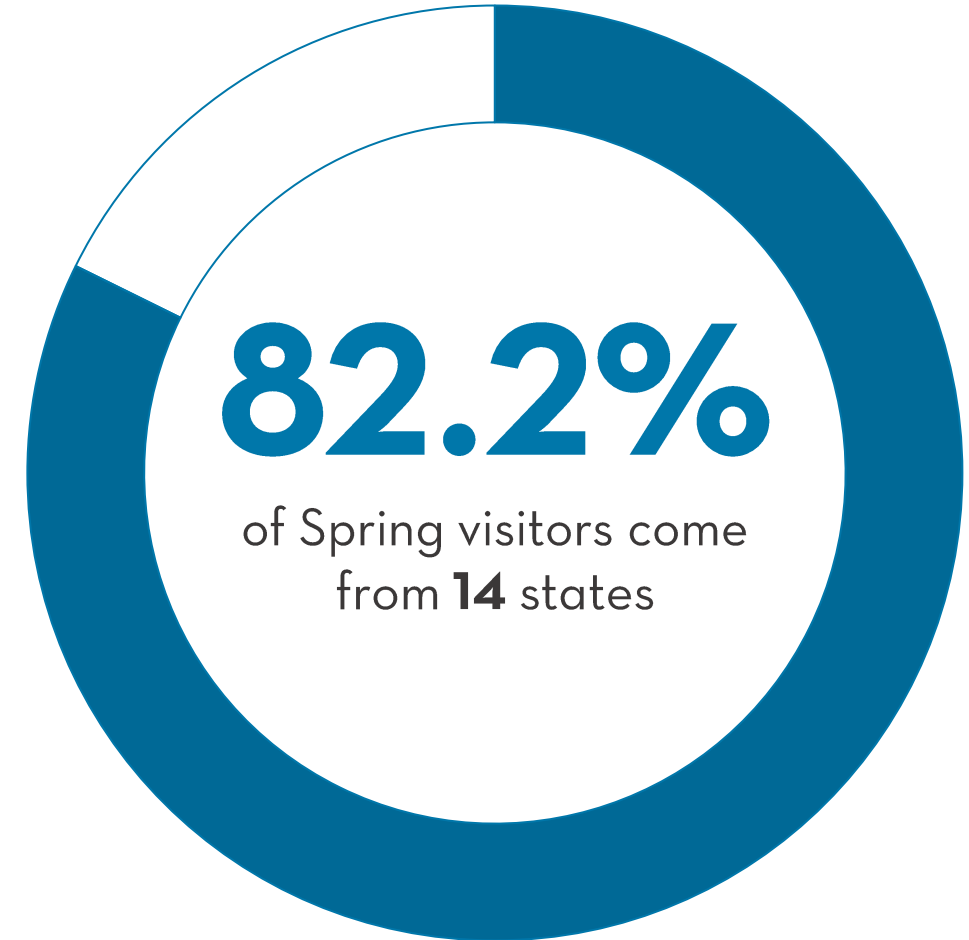


ORIGIN OF SPRING VISITORS



ORIGIN OF SPRING VISITORS

State	% of Visitors
Georgia	14.1%
Texas	12.6%
Tennessee	10.6%
Alabama	8.8%
Florida	6.3%
Mississippi	5.8%
Missouri	3.6%
Louisiana	3.6%
Indiana	3.5%
Illinois	3.0%
Kentucky	2.8%
North Carolina	2.8%
Ohio	2.4%
Arkansas	2.3%



ORIGIN OF SPRING VISITORS



12.7% (+0.5% points from 2025) of all visitors come from the **Atlanta** market



7.4% of visitors are from the **Nashville** market

Top Origin Markets	% of Visitors
Atlanta	12.7%
Nashville	7.4%
Dallas-Fort Worth	4.7%
Houston	3.8%
Birmingham	3.8%
Chicago	2.7%
Saint Louis	2.3%
New Orleans	2.2%
Charlotte	2.0%
Denver	2.0%
Mobile-Pensacola	1.9%
Indianapolis	1.8%
Memphis	1.7%
Columbus-Tupelo-West Point	1.7%
Jackson, MS	1.7%
Austin	1.6%
Louisville	1.5%

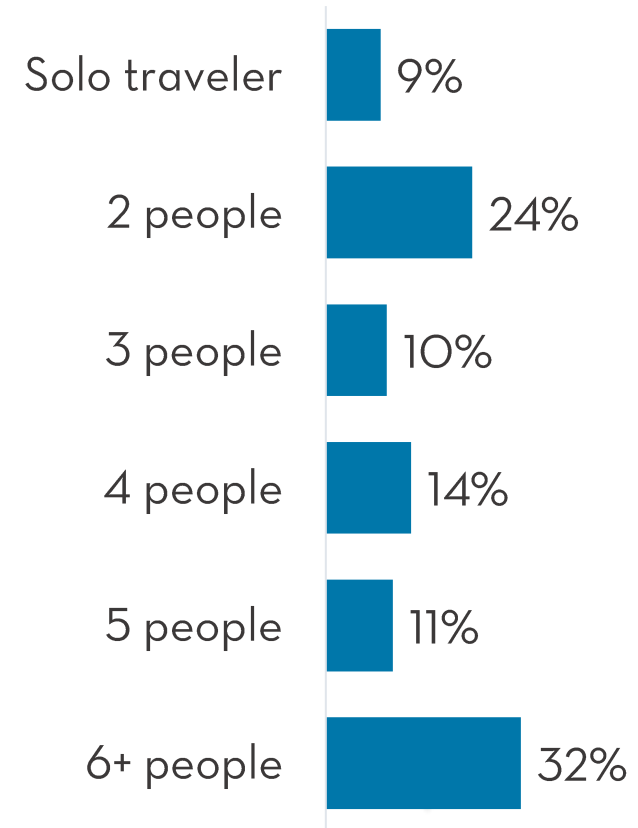
TRAVEL PARTY SIZE AND COMPOSITION



Visitors travel in a party composed of **4.5** people (4.7 in 2025)



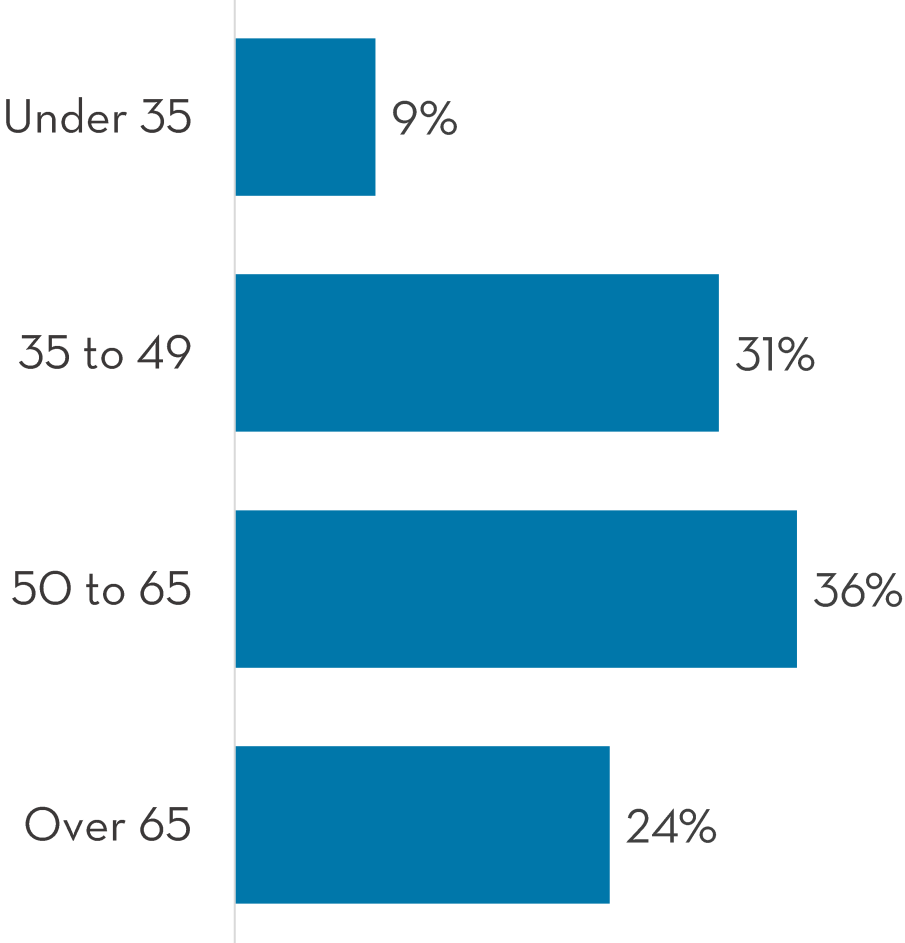
57% (+3% points from 2025) of visitors travel with children under the age of 20



AGE OF SPRING VISITORS¹



Median age of Spring visitors is
54 years old (54 in 2025)



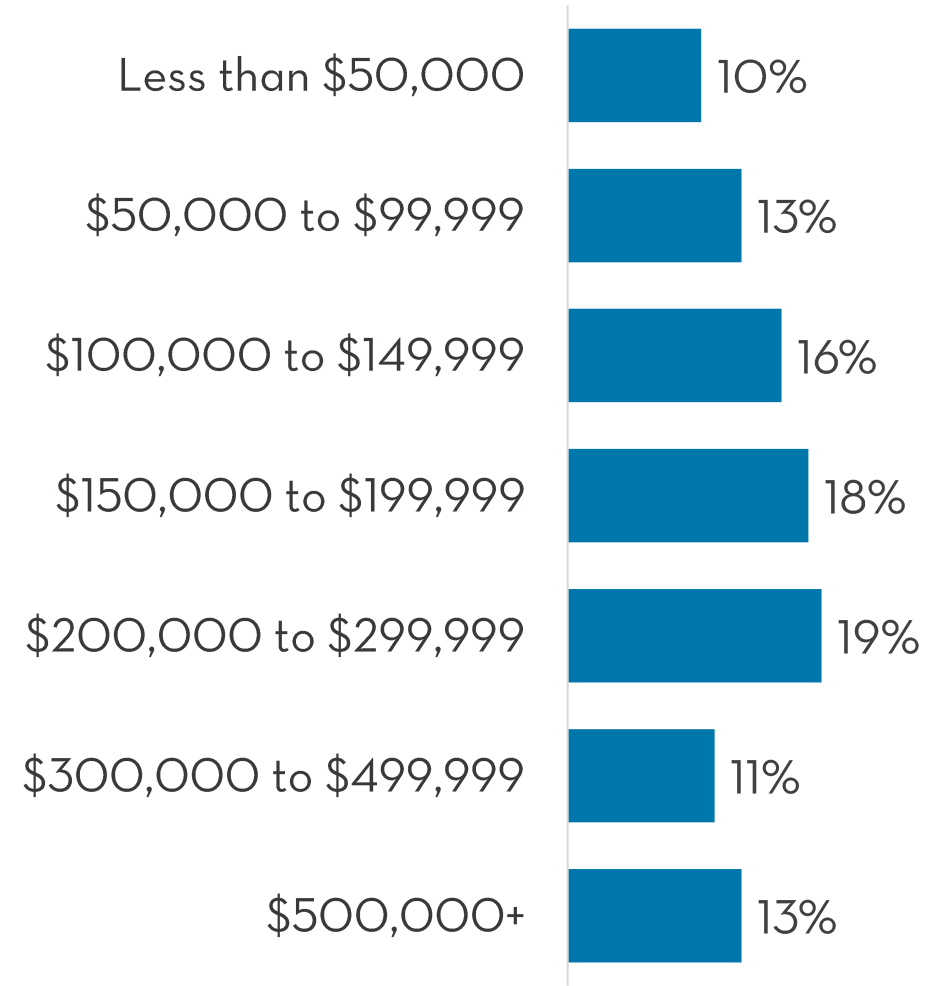
¹Age of member of travel party surveyed.

The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

TOTAL HOUSEHOLD INCOME



Spring visitors have a **median** household income of **\$180,600** (\$165,400 in 2025), while estimated **average** household income is **\$222,800** (\$225,300 in 2025)



VISITOR JOURNEY: TRIP EXPERIENCE



VISITOR ACCOMMODATIONS



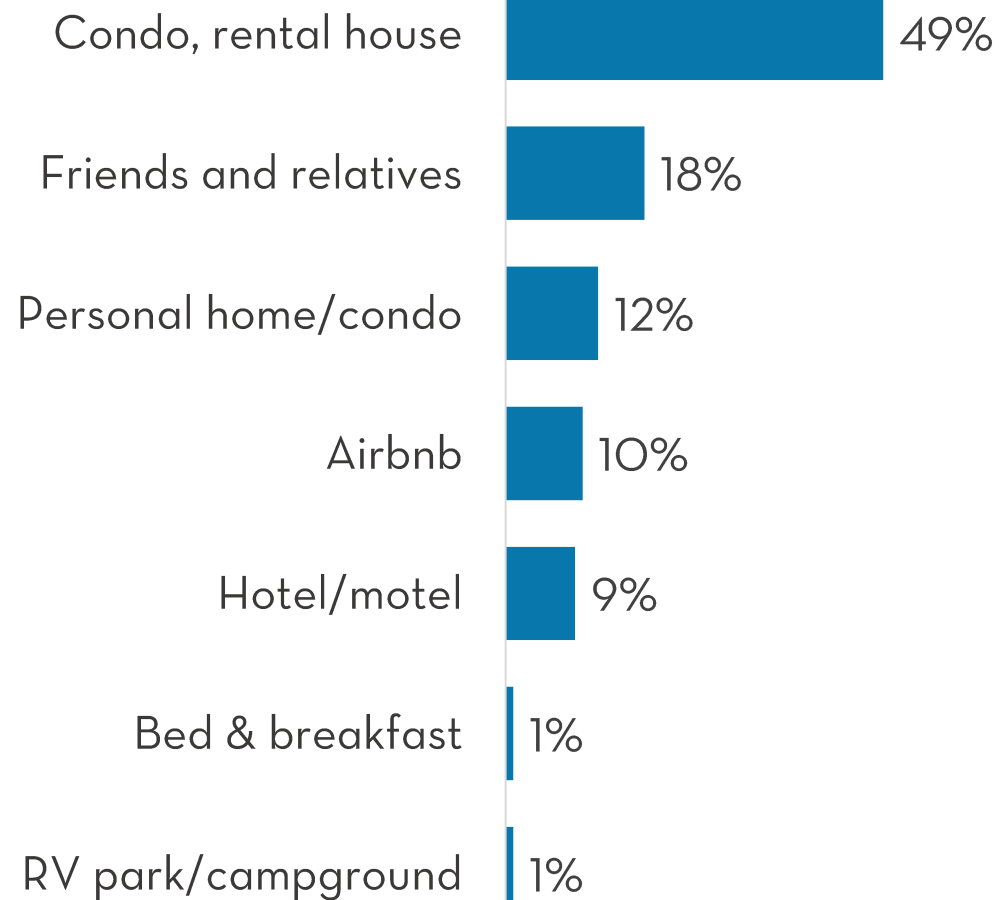
Nearly half of Spring overnight visitors stay in a condo or rental house



Nearly 1 in 5 overnight visitors stay with their friends or family



12% stay in their personal home/condo



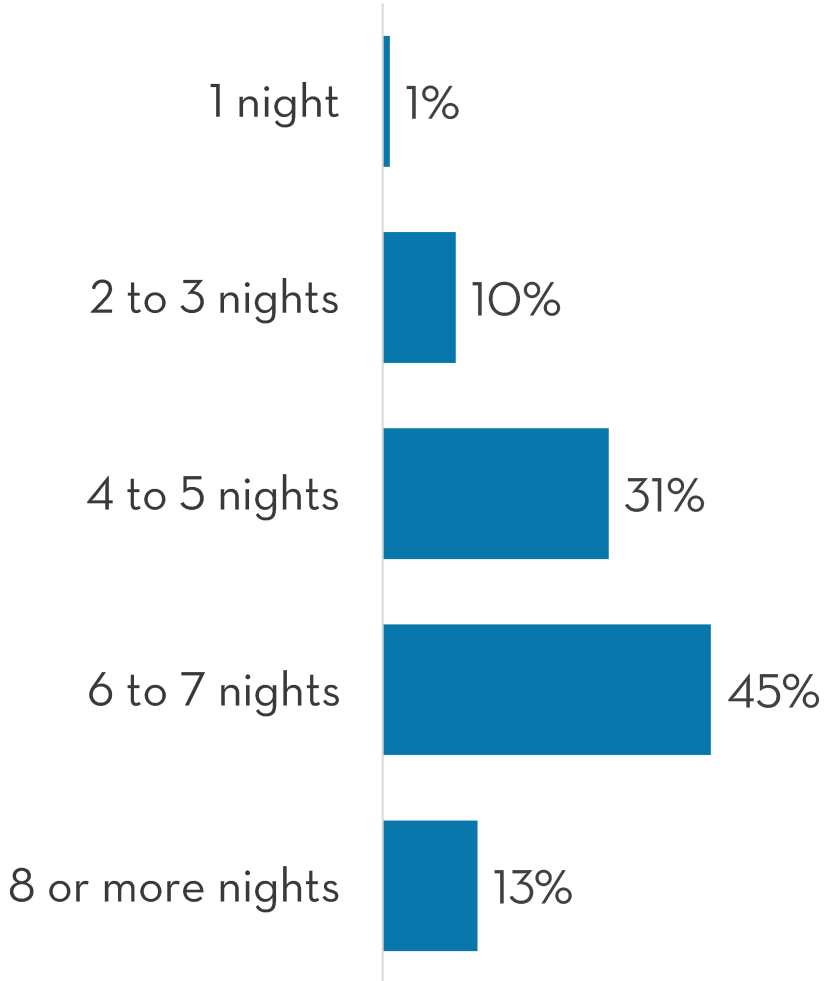
LENGTH OF STAY



Spring visitors¹ stay an average of **6.1** nights² in Walton County (6.3 nights in 2025)



Spring visitors staying in paid accommodations spend an average of **6.2** nights² in Walton County (6.3 nights in 2025)



¹Includes visitors staying paid accommodations, non-paid, and day trippers.
²Visitors who stayed in Walton County up to 30 nights.

NUMBER OF VISITS TO WALTON COUNTY



17% (+2% points from 2025) of Spring visitors are visiting for the first time



38% (+1% point from 2025) of Spring visitors have visited Walton County more than 10 times

That was my first time



17%

2 - 3



15%

4 - 5



15%

6 - 10



15%

11 - 20



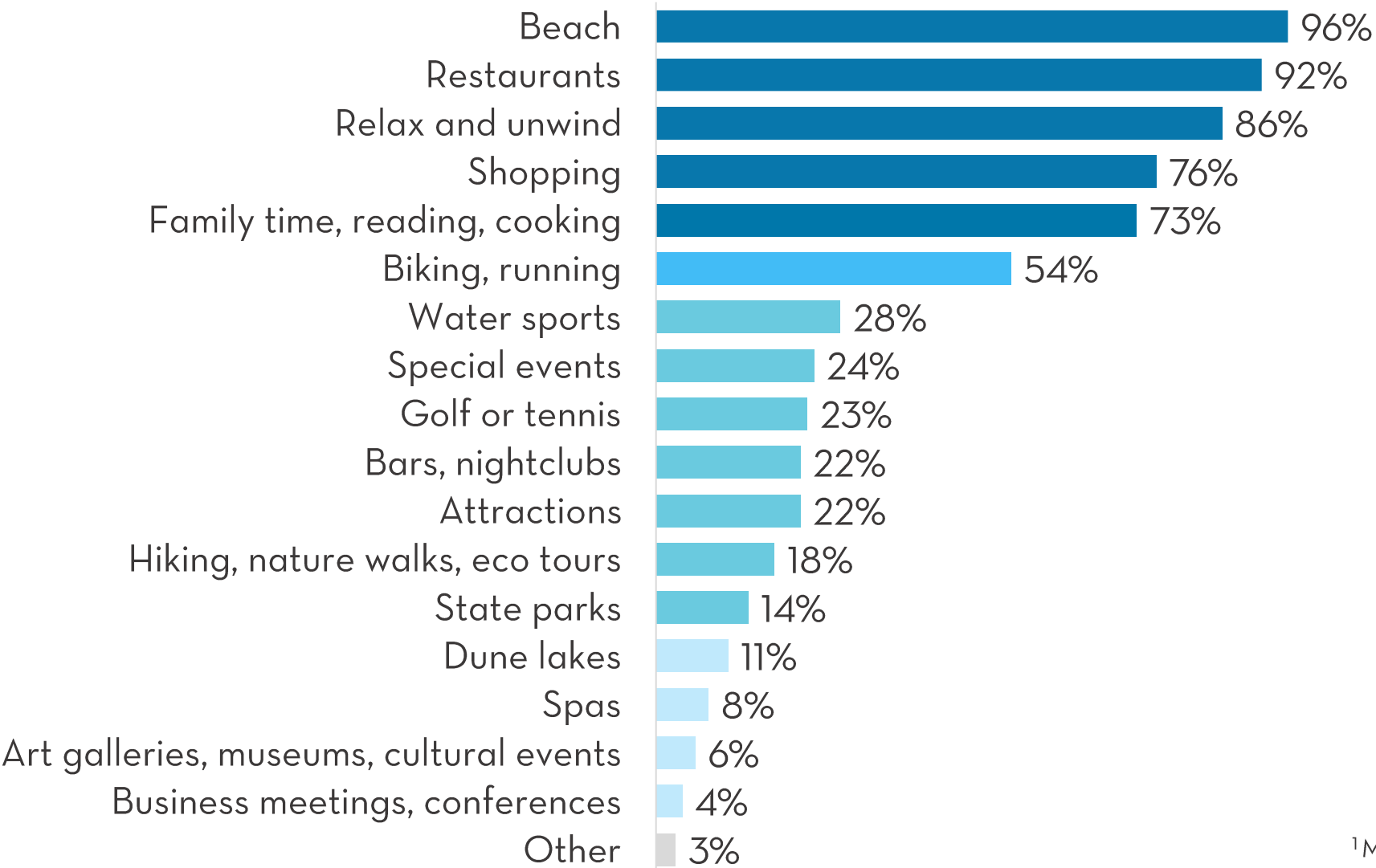
18%

21+



20%

VISITOR ACTIVITIES¹

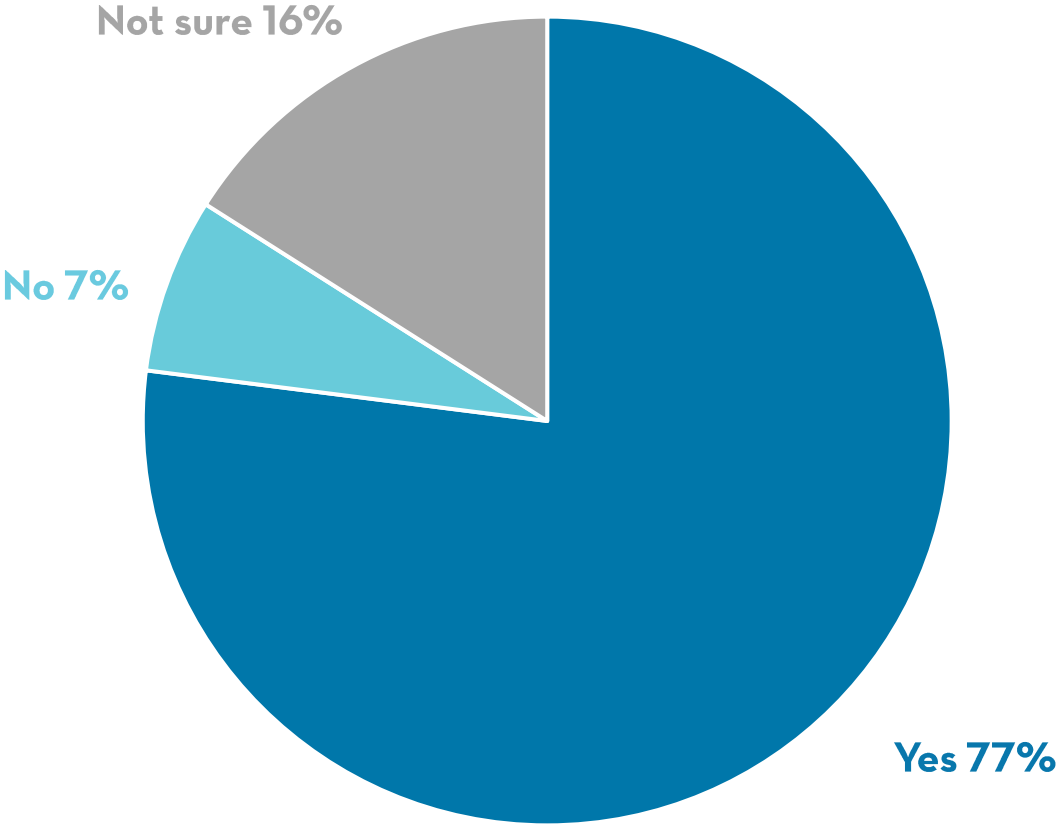


¹ Multiple responses permitted.

BEACH SAFETY



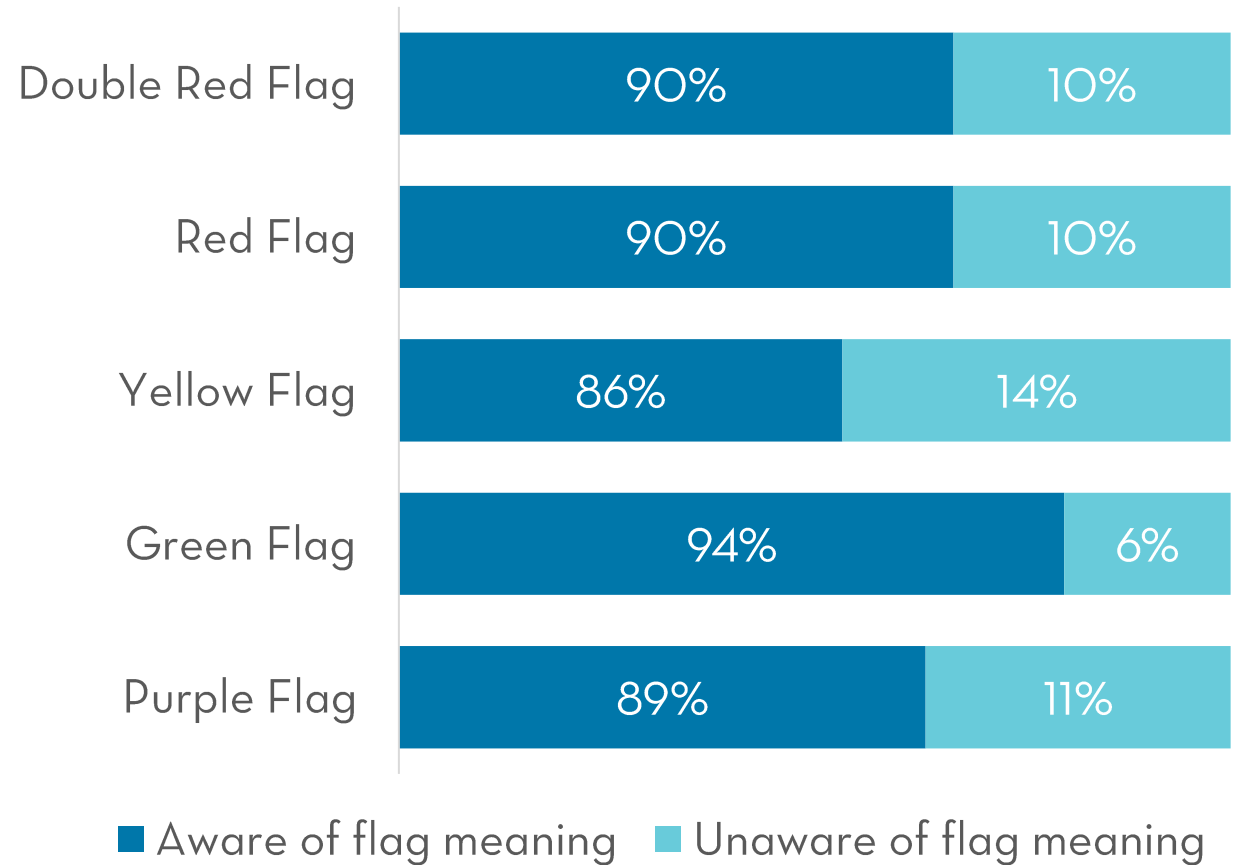
77% of Spring visitors know there are flags posted along the beaches to indicate how safe it is to go into the water



BEACH FLAG AWARENESS

Between 86%-94% of Spring visitors are aware of the meaning of each flag color

63% (-6% points from 2025) of Spring visitors are aware that entering the Gulf during double red flag conditions can result in a \$500 fine and criminal charges



TYPICAL WALTON COUNTY TRAVEL PARTY EXPENSES¹

- » The typical travel party spends **\$671** (\$687 in 2025) a day while in Walton County.
- » The typical travel party spends a total of **\$4,073** (\$4,360 in 2025) while visiting Walton County.

Spending Category ¹	Average Daily Expenditure	Total Trip Expenditure
Accommodations	\$244	\$1,481
Restaurants	\$144	\$874
Groceries	\$62	\$376
Shopping	\$96	\$583
Entertainment	\$53	\$322
Transportation	\$63	\$382
Other	\$9	\$55
Total	\$671	\$4,073

¹Includes overnight visitors and day trippers.

VISITOR JOURNEY: POST-TRIP EVALUATION



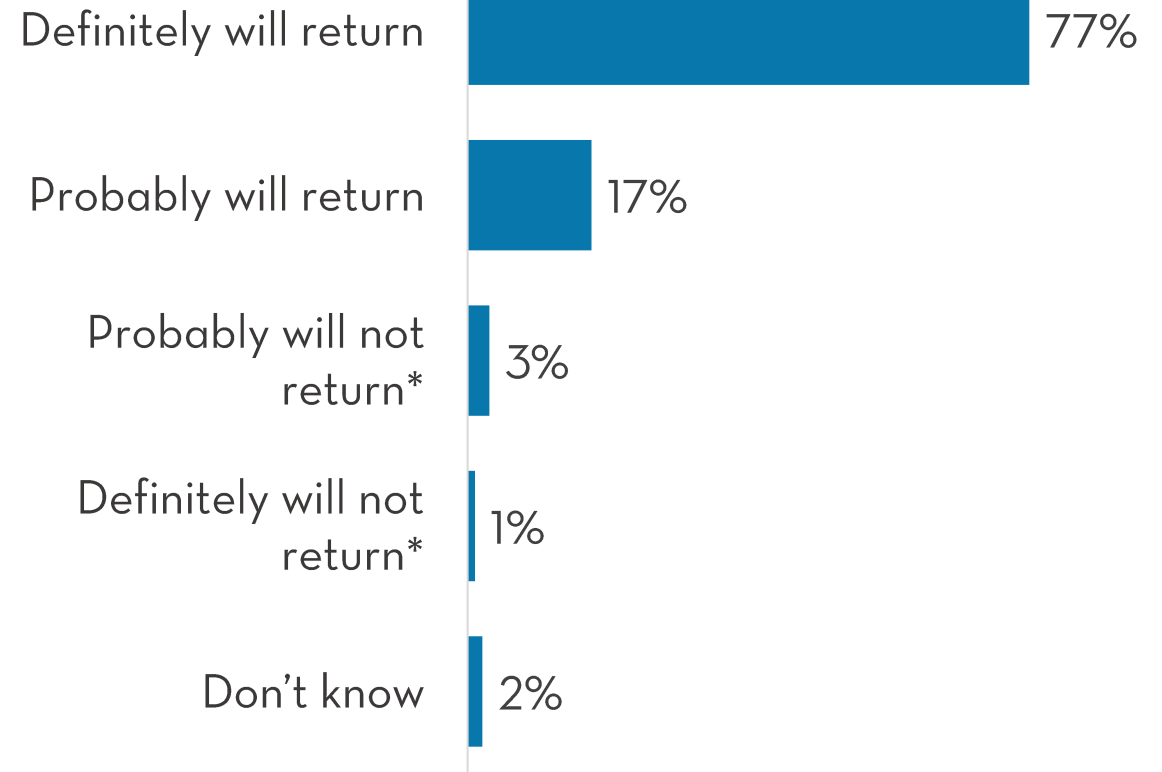
RATING AND LIKELIHOOD OF RETURNING TO WALTON COUNTY

Visitors gave Walton County a rating¹ of **9.2** (+0.1 point from 2025) as a place to vacation

Over 3 in 4 spring visitors will definitely return to Walton County

Only 4% of visitors are uncertain about returning. Top reasons² include:

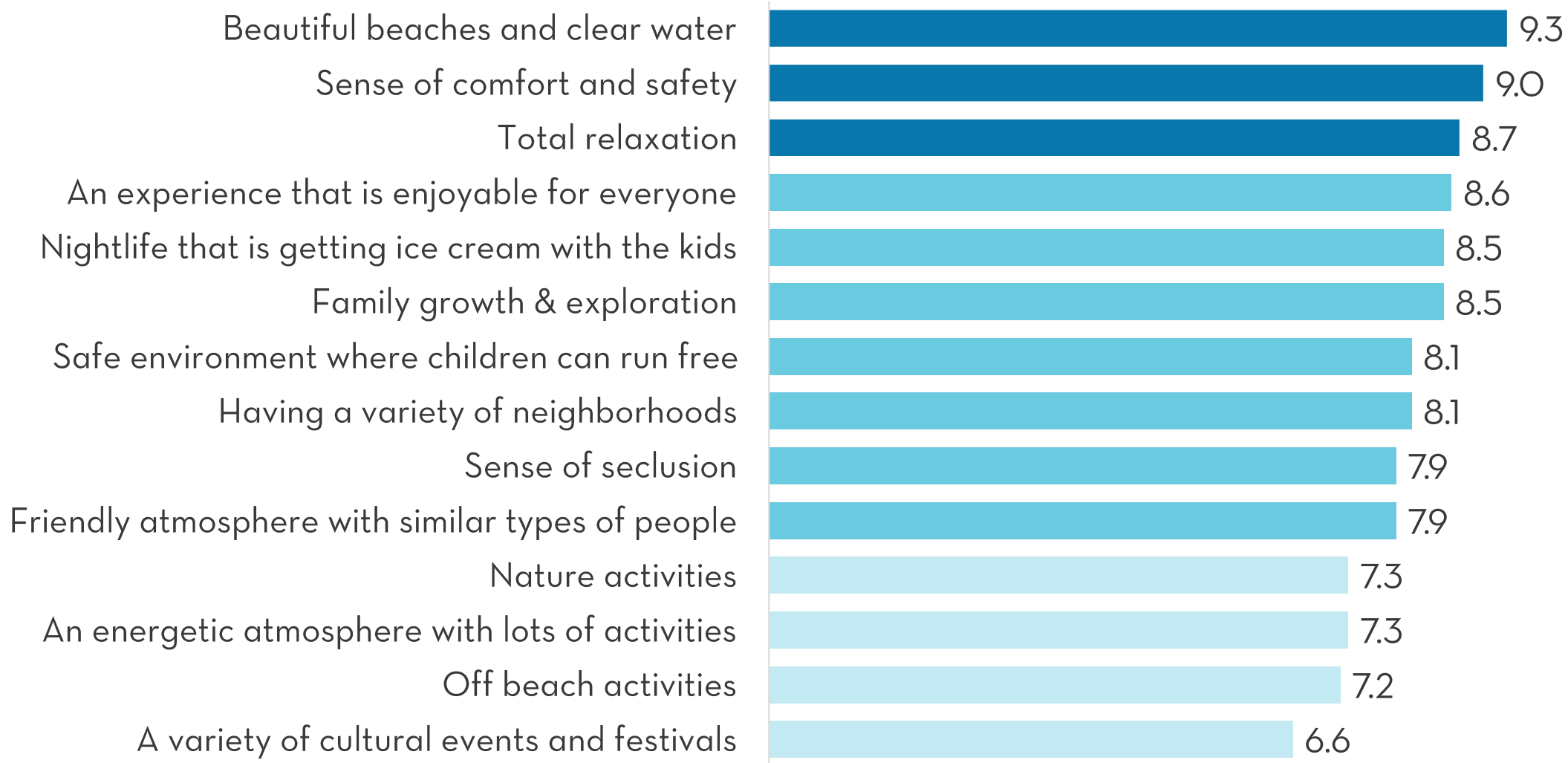
1. Parking was a concern
2. Too crowded



¹10 = Excellent; 1= Poor

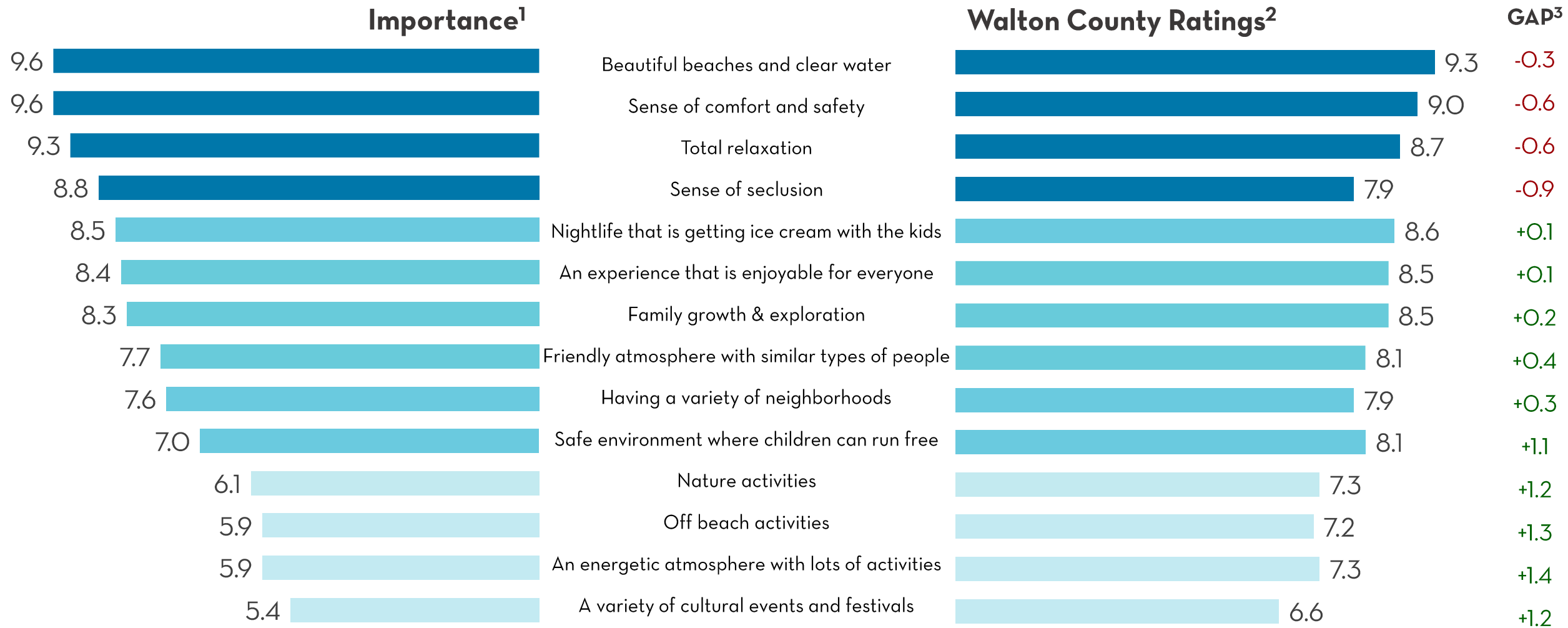
²Reason for uncertainty about returning to Walton County should be interpreted cautiously due to the small sample size answering the question.

RATING WALTON COUNTY ATTRIBUTES¹



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

VACATION ATTRIBUTE IMPORTANCE VS. RATINGS



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

² Rated on a scale from 1 to 10 where 10 is excellent and 1 is poor.

³ GAP equals the difference between the importance of an attribute and the rating of WC on that attribute. For example, a "Beautiful beaches and clear water" is extremely important to visitors with a score of 9.6. Visitors rated WC as 9.3 on its beaches. Hence, the GAP is -0.3.

AREA DESCRIPTIONS



“Top of our list of favorite beaches.”

“Feels very clean and safe.”

“Best place on Earth.”

“We love the time we get to spend here. It’s a gem.”

“It’s dreamy.”

“Gorgeous water and beach.”

“Great place for families.”

“My little girls love it here and love to ride the trolley.”

“I love this area so much, if it wasn’t for work, I would have moved here.”

AREA DESCRIPTIONS



"A safe place to bring kids and grandparents. It's wonderful."

"The perfect place for our family to spend vacation."

"Luxurious."

"We enjoy the white sand and calm blue water."

"No place like it."

"Doesn't get much better than this."

"Incredible."

"An amazing place."

"It's gorgeous! Next time we would like to stay longer."

FEELINGS ASSOCIATED WITH WALTON COUNTY



"What's not to love?"

"Serenity and peace."

"Joy, joy, and more joy!"

"We enjoy every minute here."

"Magical."

"Happy, happy, happy."

"It's our favorite place to be."

"It's even prettier than I thought it would be."

"Gem of a place."

"We cherish our time here with the kids."

"Amazing."

"Therapeutic."

OPPORTUNITIES FOR IMPROVEMENT



"It's beautiful, but not much parking and beaches are very overcrowded. We tried the beach at Gulf Place and people were on top of one another - wasn't enjoyable."

"It's beautiful but expensive."

"It's expensive, very beautiful though!"

WALTON COUNTY TOURISM

Spring 2026 Visitor Tracking Study

March - May 2026

Downs & St. Germain Research
contact@dsg-research.com
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