

WALTON COUNTY TOURISM

Winter 2026 Visitor Tracking Study
December 2025 - February 2026



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Visitor Tracking Study

This report is based on 394 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 December 2025 and February 2026.

ECONOMIC IMPACT SUMMARY



TOURISM SNAPSHOT: KEY PERFORMANCE INDICATORS



461,200

TOTAL VISITORS

vs. 2025

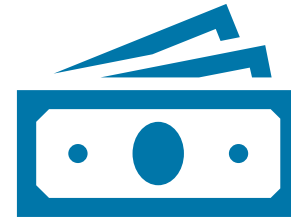
↓ 6.7%



615,200

ROOM NIGHTS

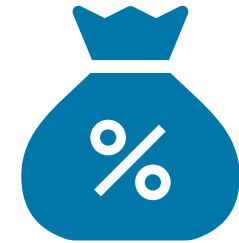
↑ 2.2%



\$573,517,300

DIRECT SPENDING

↑ 5.1%



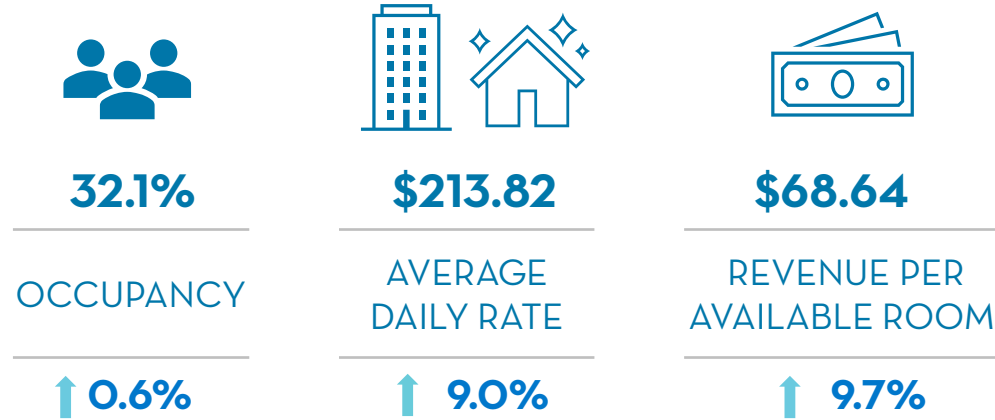
\$4,382,259

TOURISM DEVELOPMENT TAX

↑ 2.3%¹

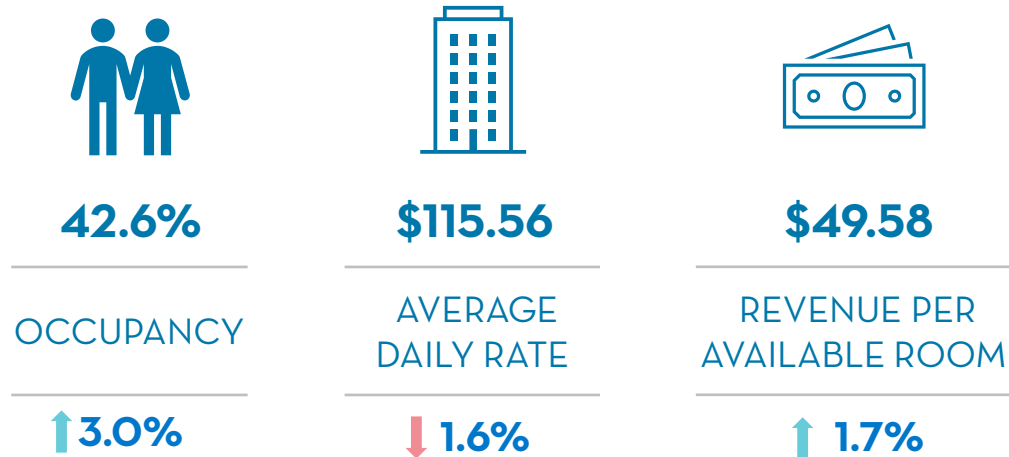
TOURISM SNAPSHOT: LODGING METRICS¹

COMBINED

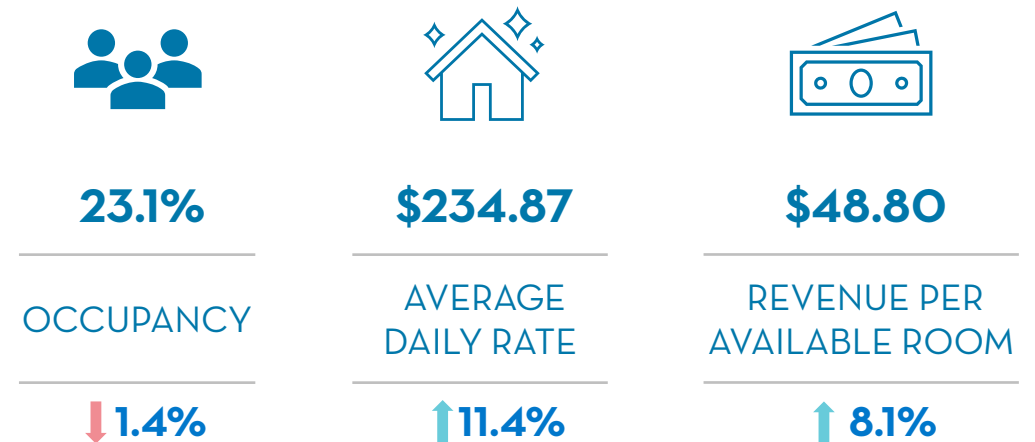


¹Airbnb (effective April 30, 2025) and Vrbo (effective May 30, 2025) have updated how rates are quoted through their platforms. The ADR now includes cleaning fees, platform service fees, and applicable discounts (e.g., weekly or monthly stay discounts). Therefore, the ADR of vacation rentals may appear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

HOTELS²



VACATION RENTALS³



SPECIAL ATTRIBUTES OF THE WINTER SEASON

Insights:

- » Winter experiences the lowest volume of visitors to Walton County of any season, and therefore the lowest amount of total direct spending.
- » Despite low overall direct spending, Winter visitors consistently spend more per person than visitors during other seasons.
- » Even when accounting for the longer lengths of stays, Winter visitors spend more per visitor per day.
- » Winter travelers tend to be older, travel in smaller travel parties, and are the least likely to travel with children.
- » Walton County is in a great position to market toward the ever-expanding multi-generational sector of the travel industry. Focusing Winter marketing efforts on multi-generational memory making could boost travel party sizes and increase total spending.

Visitor Metrics	Typical Winter Visitor ¹	Typical Visitor ¹
Spend per visitor	\$1,282	\$902
Length of stay	7.3	6.0
Spend per visitor per day	\$176	\$150
Average Age	55	53
Travel Party Size	3.7	4.9
Travel with children	35%	54%

¹ Typical Winter visitor is an average of Winter figures since Winter 2022. Typical visitor is an average of annual figures for 2022 to 2025.

VISITOR PROFILE SUMMARY



WINTER 2026 VISITOR PROFILE



56

Median Age

17%

First-time Visitor

\$130,400

Median Household Income

38%

Traveled with Children
under the age of 20

3.4

Travel Party Size

7.8

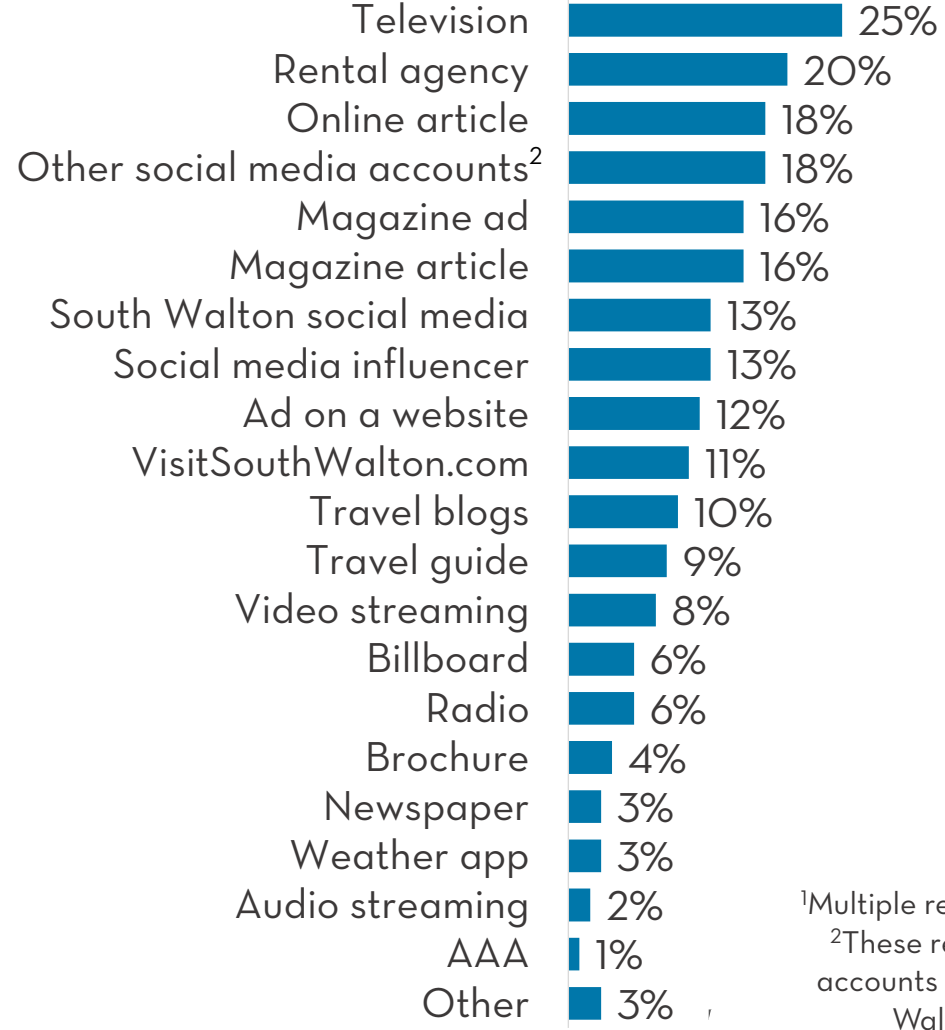
Length of Stay

WALTON COUNTY PROMOTIONS¹

Base: **27%** of visitors who recall advertising

Insights:

- » Over 1 in 4 Winter visitors recalled seeing promotions for Walton County before their trip- an increase of 2% points compared to Winter 2025.
- » The percentage of visitors who were influenced by ads and promotions increased 5% points year-over-year.
- » These increases indicate that increased efforts to market for the shoulder seasons is having an impact on visitors.
- » Ad recall from ads on a website, travel blogs, and video streaming increased 3% points from 2025.

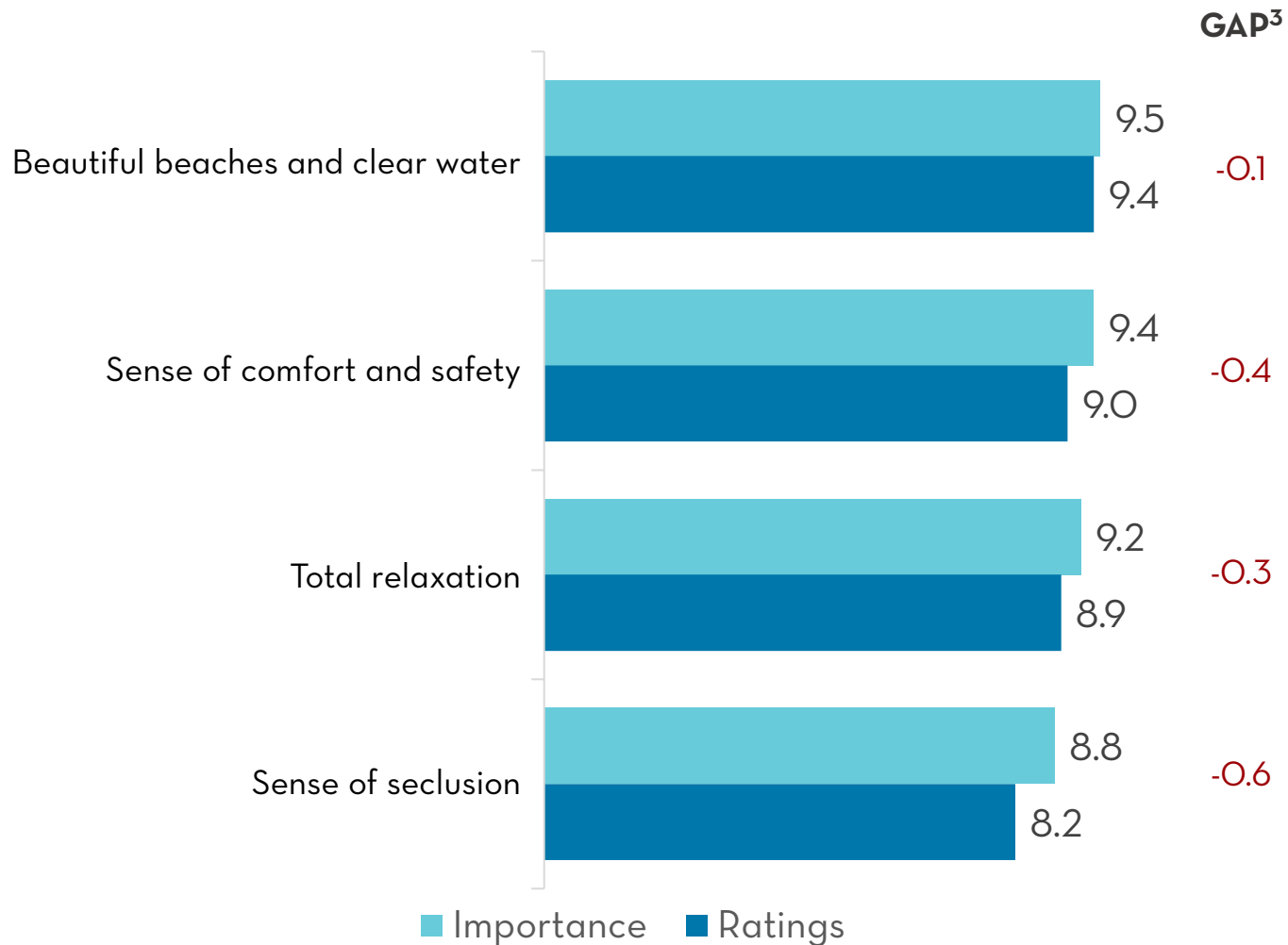


¹Multiple responses permitted.
²These refer to social media accounts not associated with Walton County Tourism

VACATION ATTRIBUTE IMPORTANCE¹ VS. RATINGS²

Insights:

- » “Sense of seclusion” received the lowest score in the GAP analysis between importance to visitors and the rating they gave Walton County.
- » Consistent with Walton County’s brand, “beautiful beaches and clear water” 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 9.5. Visitors rated WC as 9.4 on its beaches. Hence, the GAP is -0.1.

ORIGIN OF WINTER VISITORS

Insights:

- » Nearly 6 in 10 Winter visitors to Walton County are from the Southeast, not including Florida.
- » Nearly half of Winter visitors are from Alabama, Georgia, Mississippi Tennessee, or Texas
- » While the share of visitor from the Midwest decreased 6.0% points from 2025, the share from all other domestic regions increased including a 4.2% point increase in the share of visitors from the Northeast.

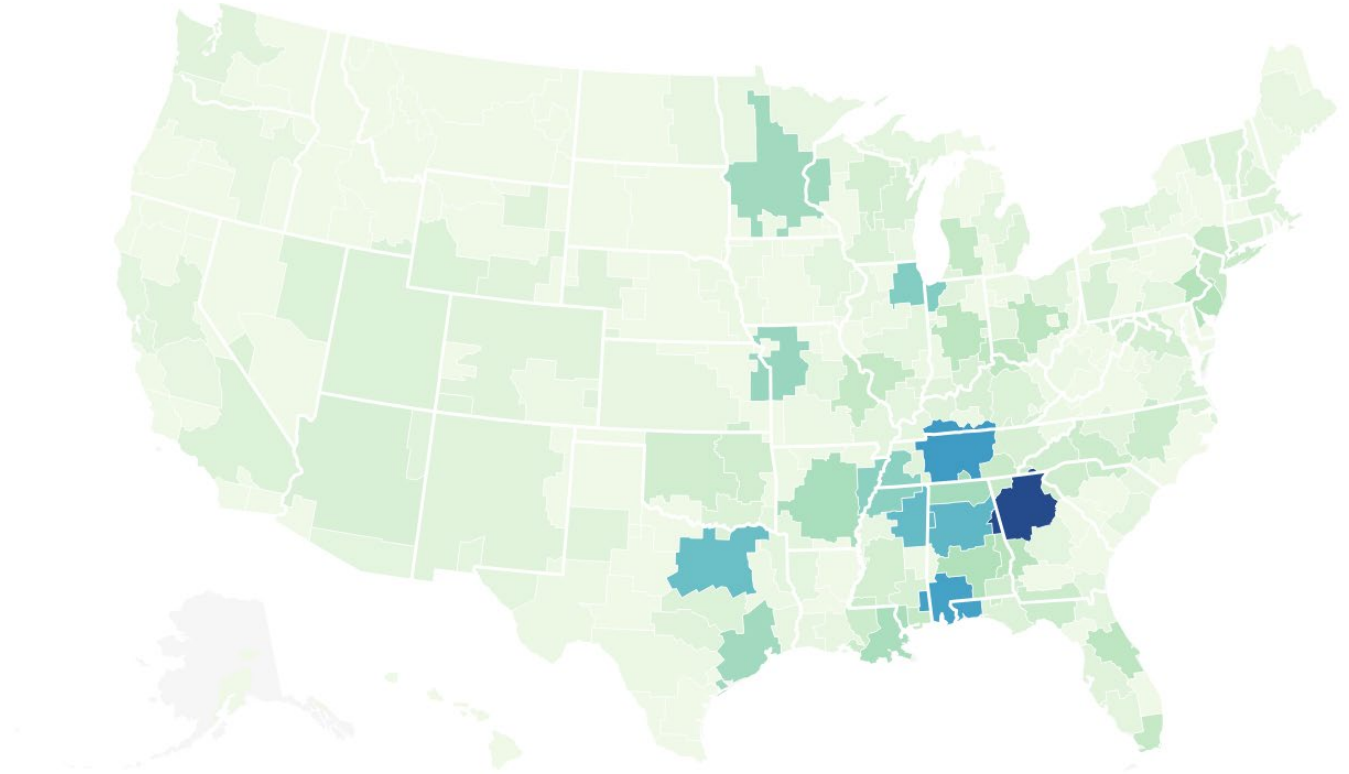
REGION		STATE	
Southeast	58.4%	Alabama	11.4%
Midwest	22.4%	Georgia	10.6%
Northeast	7.1%	Mississippi	8.9%
West	6.0%	Tennessee	8.0%
Florida	4.6%	Texas	7.7%
International	1.4%	Florida	4.6%

ORIGIN OF WINTER VISITORS

Insights:

- » Nearly 3 in 10 Winter visitors are from the Atlanta, Nashville, Mobile-Pensacola, Birmingham, Columbus-Tupelo-West Point or Dallas-Fort Worth markets.
- » While Atlanta and Nashville saw year-over-year decreases in the number of visitors, Mobile-Pensacola, Birmingham, and Huntsville-Decatur-Florence saw year over year increases.
- » Other markets including Dallas-Fort Worth, Charlotte, Kansas City, New York City, and Washington D.C. also experienced year over year increases.

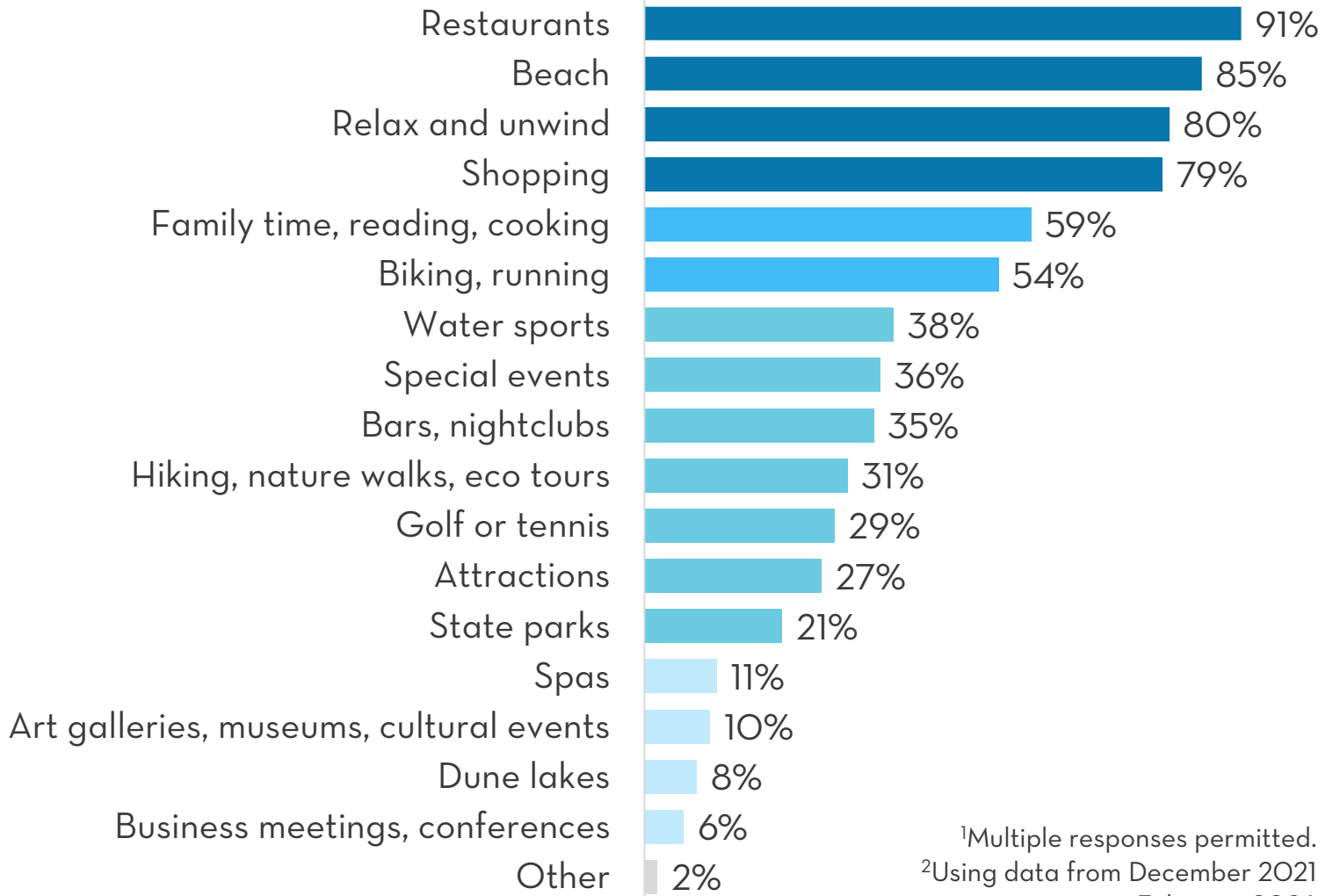
Winter Origin Markets



VISITOR ACTIVITIES¹

Insights:

- » Off-beach activities such as shopping, bars & nightclubs, hiking, nature walks, & eco-tours, golf & tennis, state parks, spas, and art galleries, museums, & cultural events consistently garner a higher percentage of visitors in Winter than other seasons.²
- » Water sports, bars & nightclubs, attractions, biking & running, special events, and shopping all saw increases from winter 2025.



¹Multiple responses permitted.

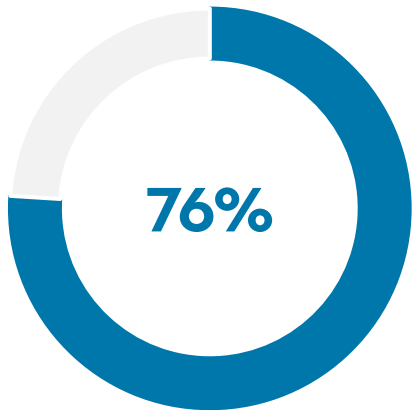
²Using data from December 2021 to February 2026

SATISFACTION METRICS



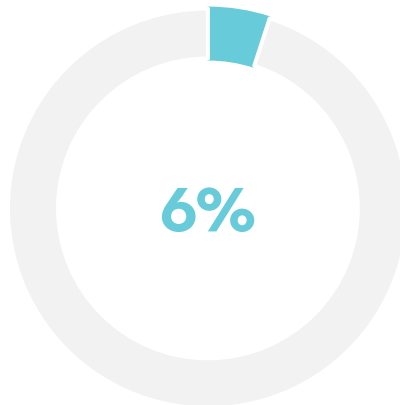
Highly Rated

Visitors gave Walton County a rating of 9.3 out of 10 (consistent with 2025) as a place to vacation



Definitely Return

76% of visitors said they would definitely return to Walton County



Uncertain About Returning

6% of visitors were uncertain of whether they would return or not

Those who were uncertain about returning to Walton County gave the following reasons:

1. **Not enough to do at night**
2. **Too expensive**
3. **Not enough to do during the day**

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

"An amazing upscale yet laid back beach destination."



"This feels like a warm slice of heaven."

"A serene and kindly environment fitting for adventure and relaxation. Friendly folks, good food, and homely location."



YEARLY COMPARISONS



VISITOR PROFILE – WINTER 2025 VS. 2026

Visitor Metrics	Winter 2025	Winter 2026
Travel party	3.5	3.4
Kids <20	34%	38%
Median age	54	56
Estimated median household income	\$126,300	\$130,400
Drove	76%	71%
Nights stayed¹	7.4	7.8
Direct expenditures (travel party for entire trip)	\$3,760	\$4,240
1st time visitor	13%	17%
Over 10 visits to Walton County	36%	32%

¹Visitors staying 30 days or fewer.

VISITOR PROFILE – WINTER 2025 VS. 2026

Top Origin States	Winter 2025	Winter 2026
Alabama	8.6%	11.4%
Georgia	12.3%	10.6%
Mississippi	9.3%	8.9%
Tennessee	11.1%	8.0%
Texas	8.0%	7.7%

Origins - Regions	Winter 2025	Winter 2026
Southeast	57.5%	58.4%
Midwest	28.4%	22.4%
Northeast	2.9%	7.1%
West	4.3%	6.0%
Florida	4.5%	4.6%
International	2.3%	1.4%

VISITOR PROFILE – WINTER 2025 VS. 2026

Top Visitor Activities	Winter 2025	Winter 2026
Restaurants	92%	91%
Beach	86%	85%
Relax and unwind	82%	80%
Shopping	78%	79%
Family time, reading, cooking	63%	59%
Biking, running	51%	54%
Water sports	27%	38%
Special events	33%	36%
Bars, nightclubs	27%	35%
Hiking, nature walks, eco tours	31%	31%
Golf or tennis	32%	29%
Attractions	23%	27%
State parks	21%	21%
Spas	12%	11%
Art galleries, museums, cultural events	11%	10%
Dune lakes	10%	8%
Business meetings, conferences	7%	6%
Other	2%	2%

VISITOR PROFILE – WINTER 2025 VS. 2026

Visitor Metrics	Winter 2025	Winter 2026
Will return to Walton County¹	97%	94%
Rating for overall experience²	9.3	9.3
Viewed Visitors Guide³	25%	31%
Planned trip 6+ months out	21%	17%
Used VisitSouthWalton.com	11%	11%
Used 1 of 16 beaches' websites	15%	11%
Use the term “South Walton”	11%	15%

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

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

³ 23% used the online version & 4% used the print version.

DETAILED FINDINGS



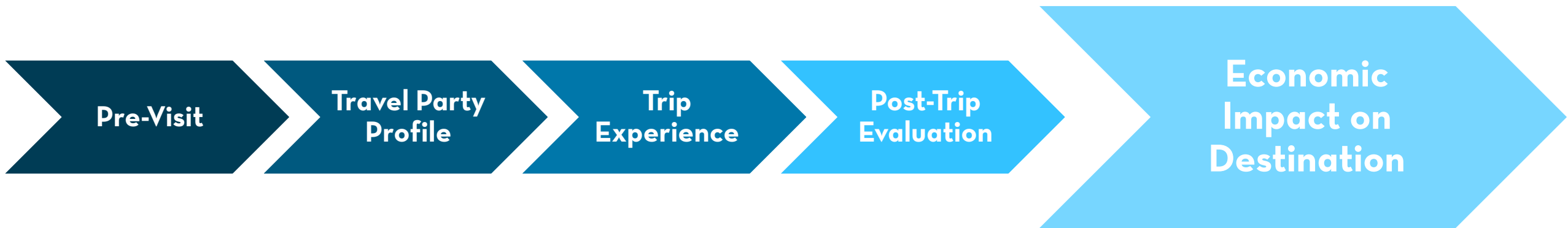
STUDY OBJECTIVES: MAP THE VISITOR JOURNEY

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



VISITOR JOURNEY: ECONOMIC IMPACT

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



ECONOMIC IMPACT – WINTER 2026 VS. 2025

- » With over 615 thousand visitors this Winter, total visitor spending was over \$573 million.
- » An increase in occupancy and an increase in ADR led to an increase in RevPAR.
- » While the number of room nights increased, the total number of visitors decreased due to an increase in length of stay and a decrease in travel party size.
- » Direct spending was up year-over-year due to an increase in daily travel party spending.

Visitor Metrics	Winter 2025	Winter 2026	% Δ
Room nights	602,100	615,200	+2.2%
Total visitors	494,400	461,200	-6.7%
TDT collections	\$4,282,718	\$4,382,259	+2.3%
Direct spending	\$545,617,900	\$573,517,300	+5.1%
Occupancy	31.9%	32.1%	+0.6%
Average Daily Rate	\$196.10	\$213.82	+9.0%
RevPAR	\$62.56	\$68.64	+9.7%

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

32.1%

Occupancy

↑ 0.6%

\$213.82

ADR

↑ 9.0%

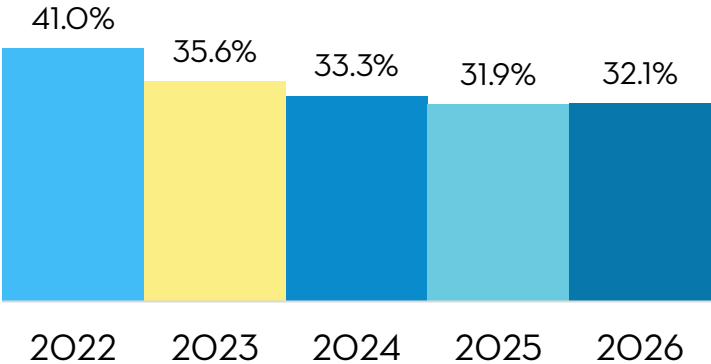
\$688.64

RevPAR

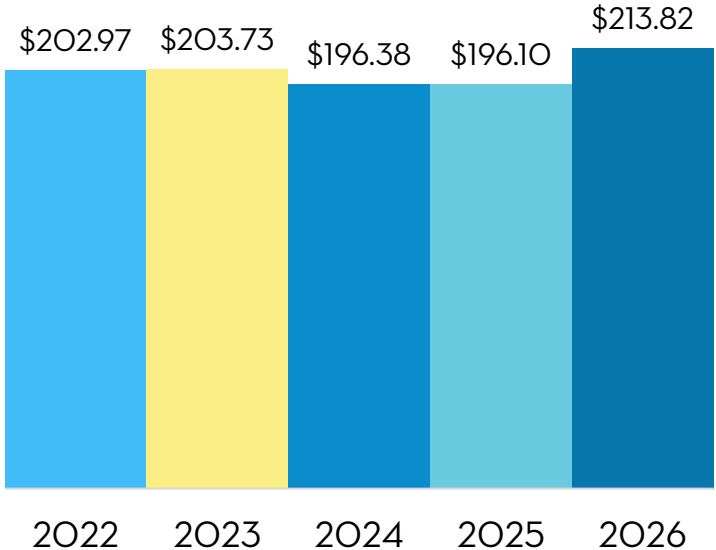
↑ 9.7%

5-YEAR OVERVIEW – WINTER LODGING METRICS¹

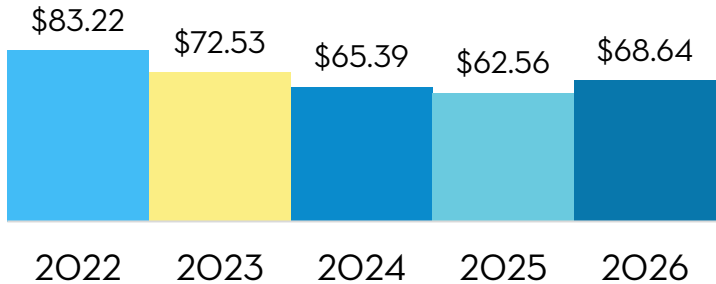
Occupancy Rate



Average Daily Rate



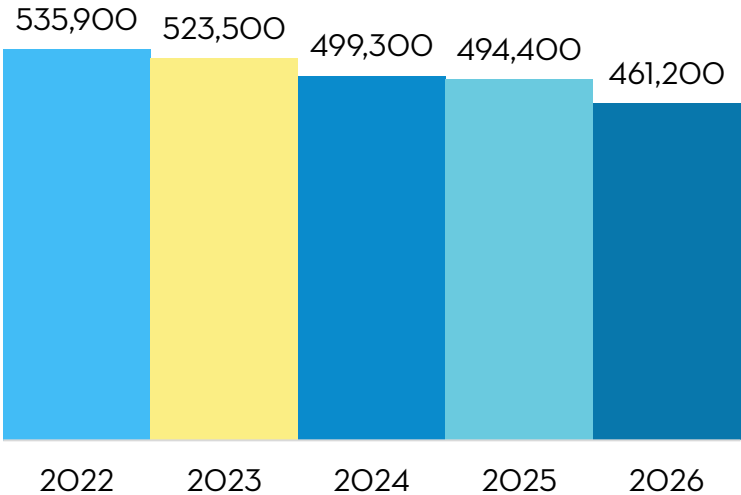
Revenue per Available Room



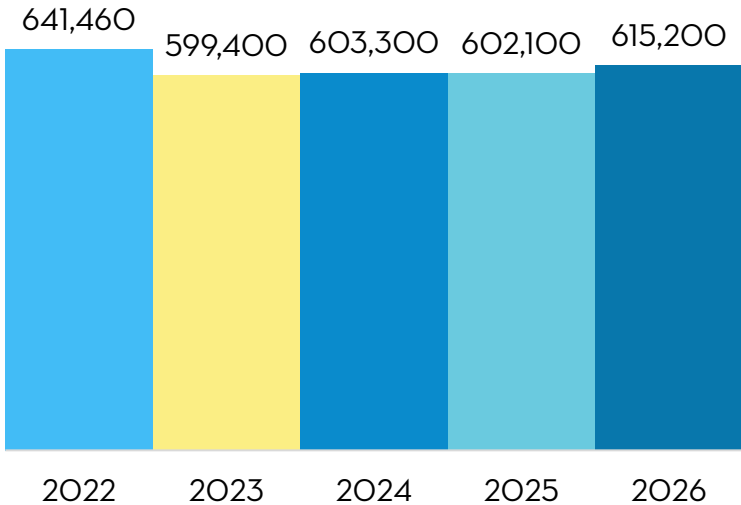
¹ Combined lodging metrics includes hotel and vacation rental data.

5-YEAR OVERVIEW - WINTER TOURISM METRICS

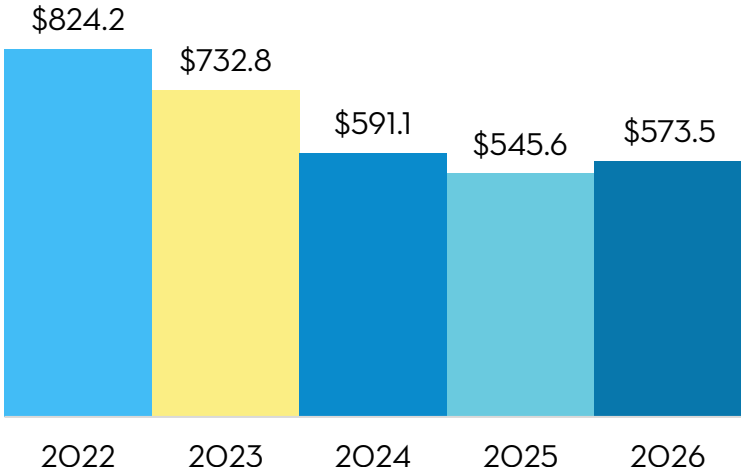
Visitors



Room Nights



Direct Spending (millions)



VISITOR JOURNEY: PRE-VISIT



PLANNING CYCLE



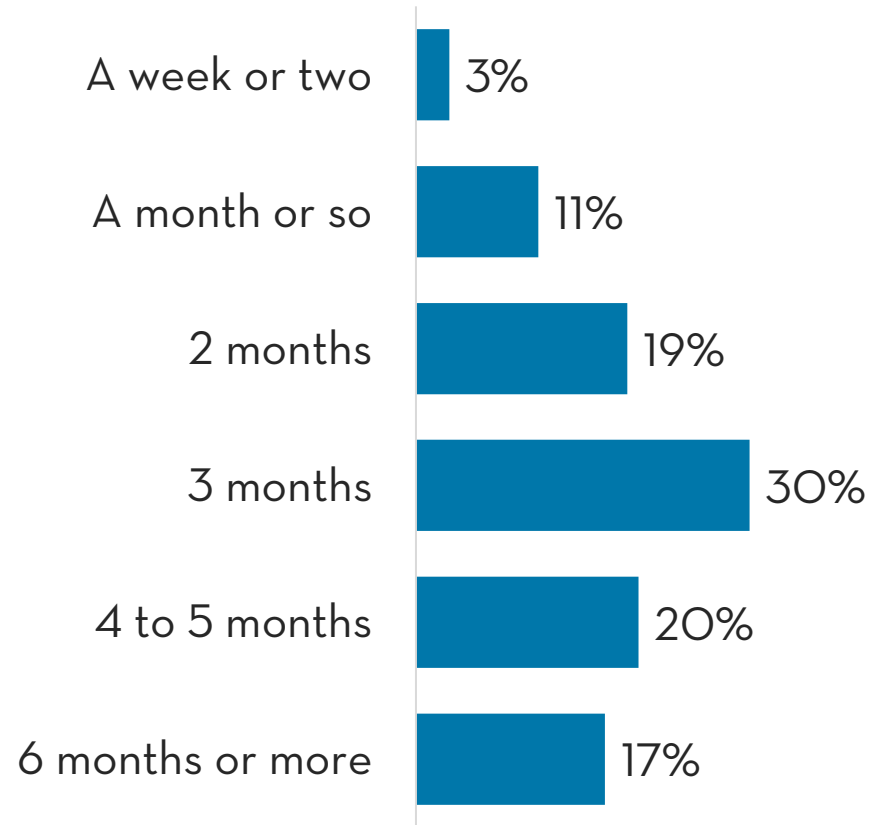
Over 2 in 3 visitors plan a Walton County Winter vacation at least **3 months** in advance



Nearly 1 in 7 visitors to Walton County have **a short (a month or less) planning cycle**



Typical trip planning cycle begins **97 days** before the trip (**101 days** in 2025)



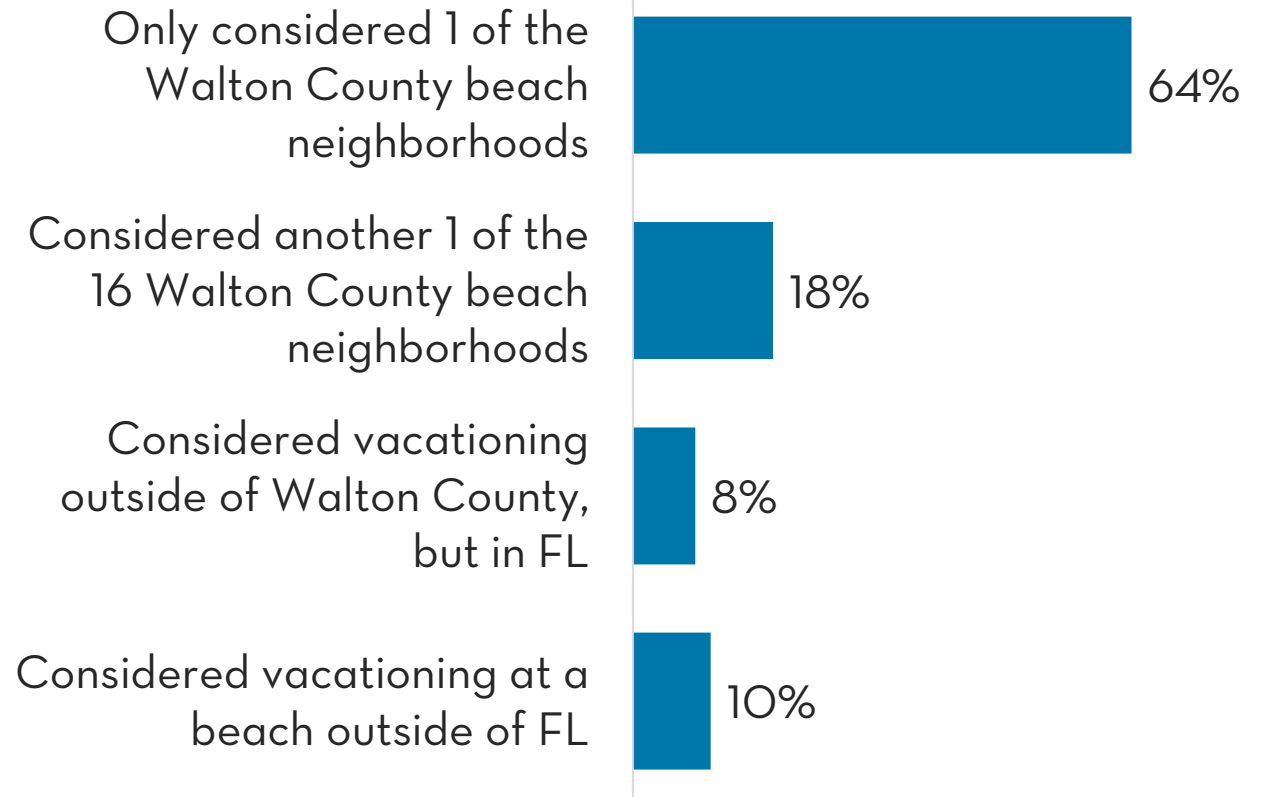
OTHER DESTINATIONS CONSIDERED



Nearly 2 in 3 (-1% point from 2025) Winter visitors only consider going to the Walton County beach neighborhood where they stay



15% (+4% points from 2025) use the term “South Walton” when referring to the area

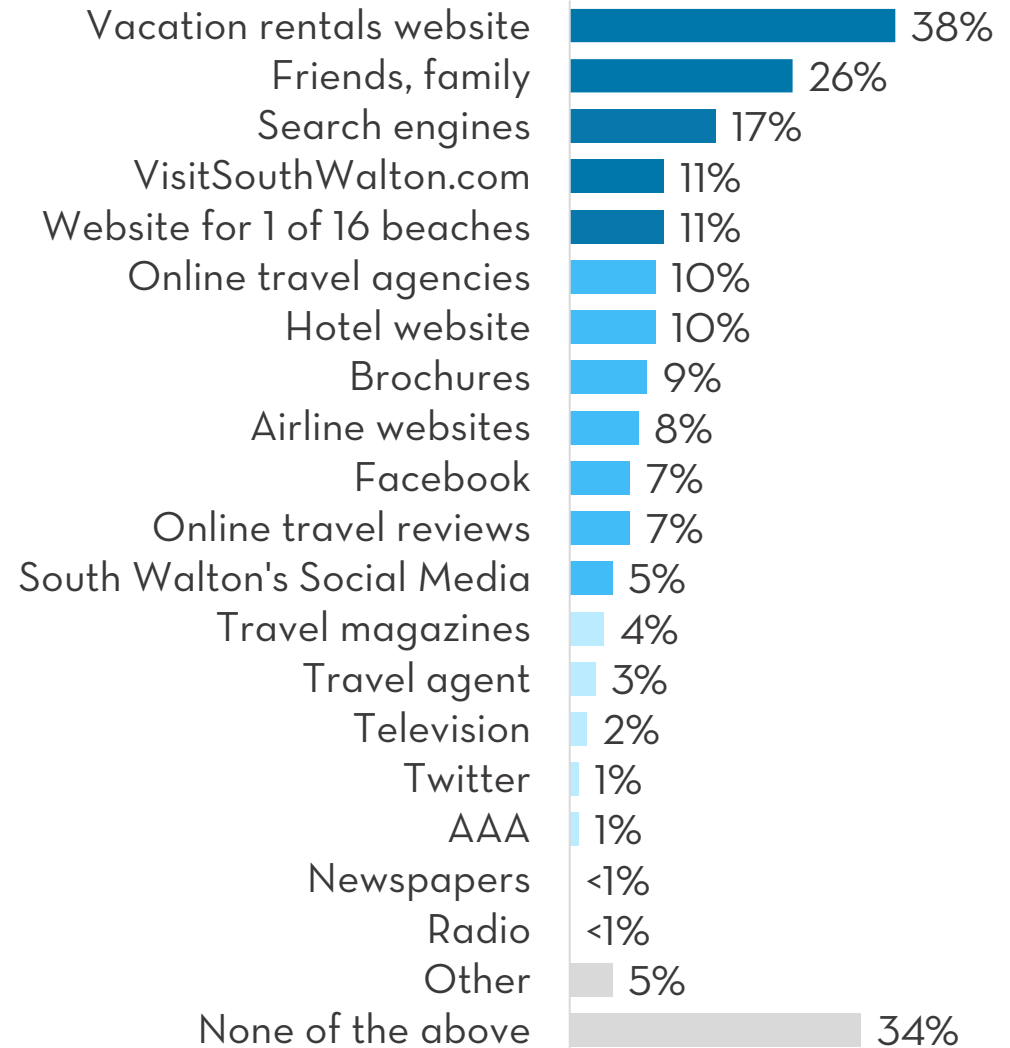


TRIP PLANNING SOURCES¹

Nearly 2 in 5 visitors use a vacation rental website to help plan their trip to Walton County

Over 1 in 4 visitors ask their friends and family for advice to help plan their trip to Walton County

Over 1 in 6 visitors use a search engine to help plan their trip to Walton County



¹ Multiple responses permitted.

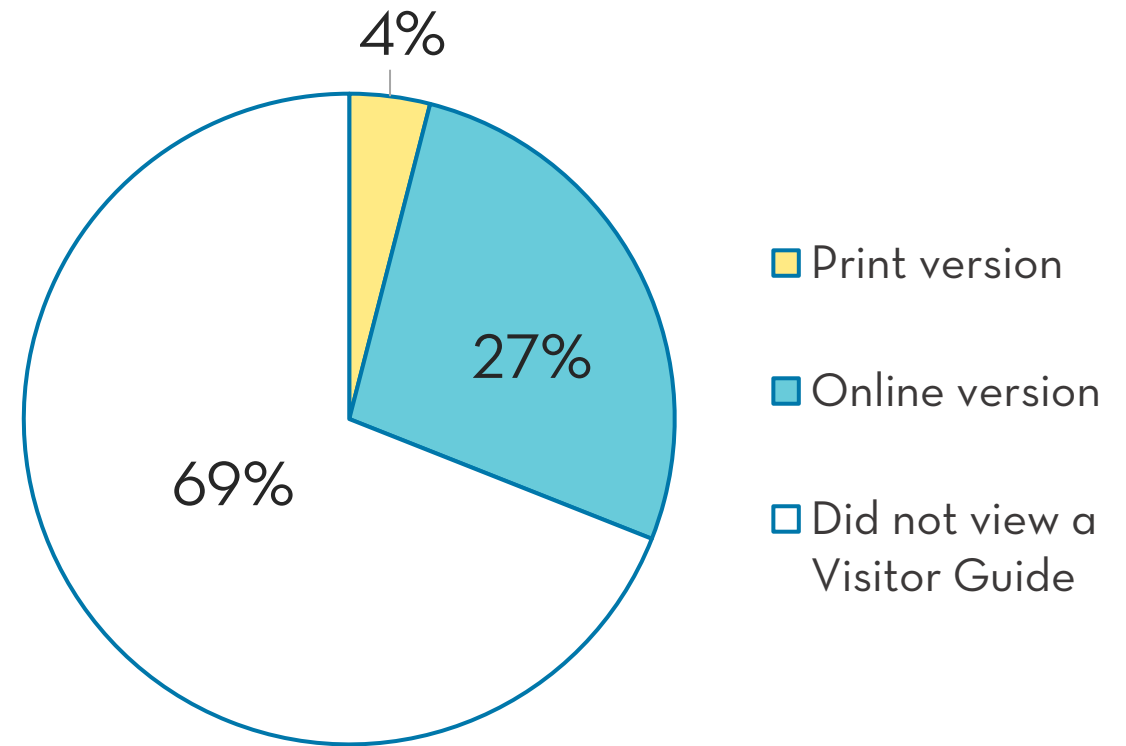
WALTON COUNTY VISITOR GUIDE



Over 3 in 10 visitors view a Walton County Visitor Guide before going to the area (+6% points from 2025)

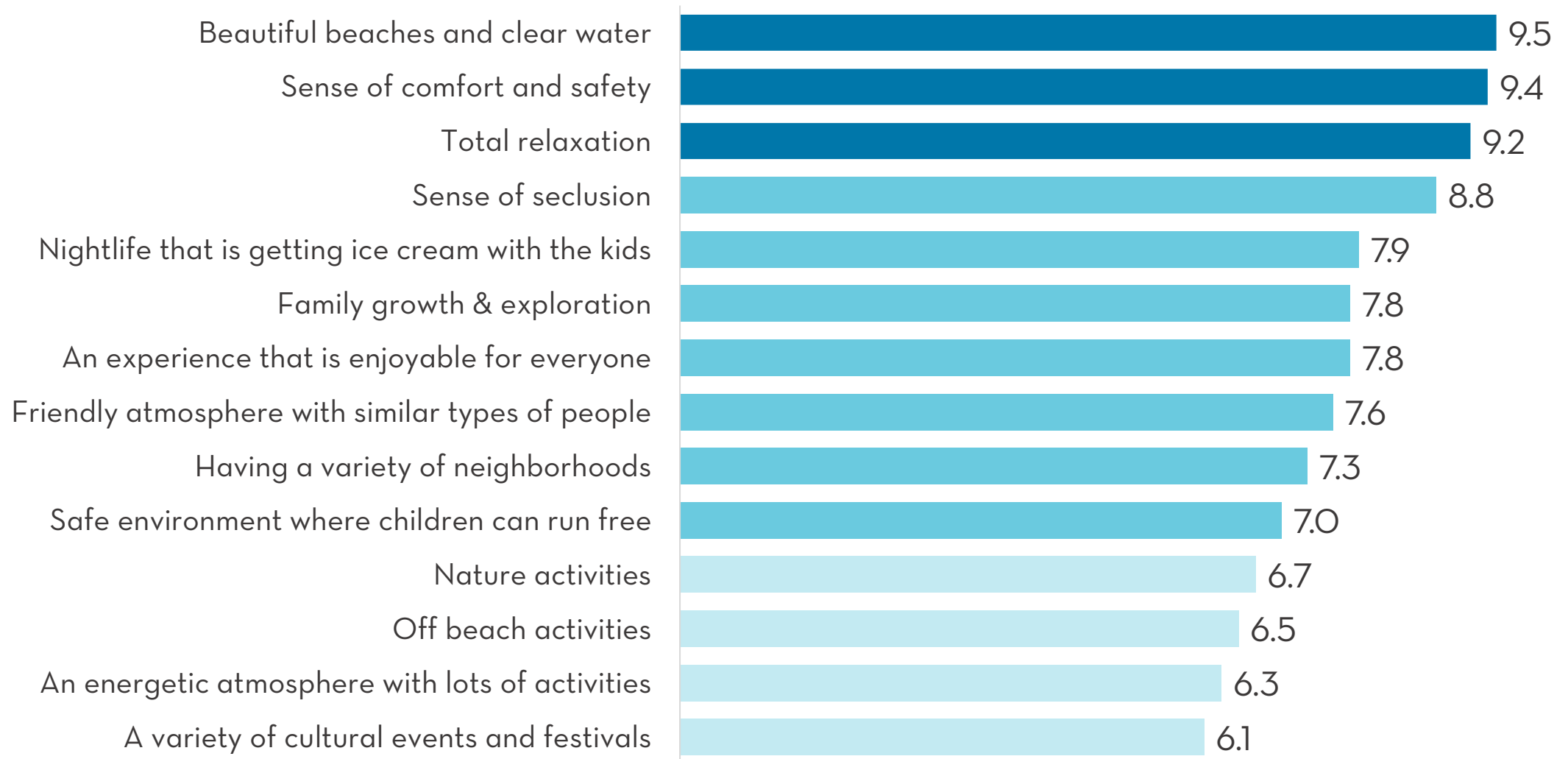


Winter visitors give the Visitor Guide a rating of **9.1 out of 10**¹ (8.9 in 2025)



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.

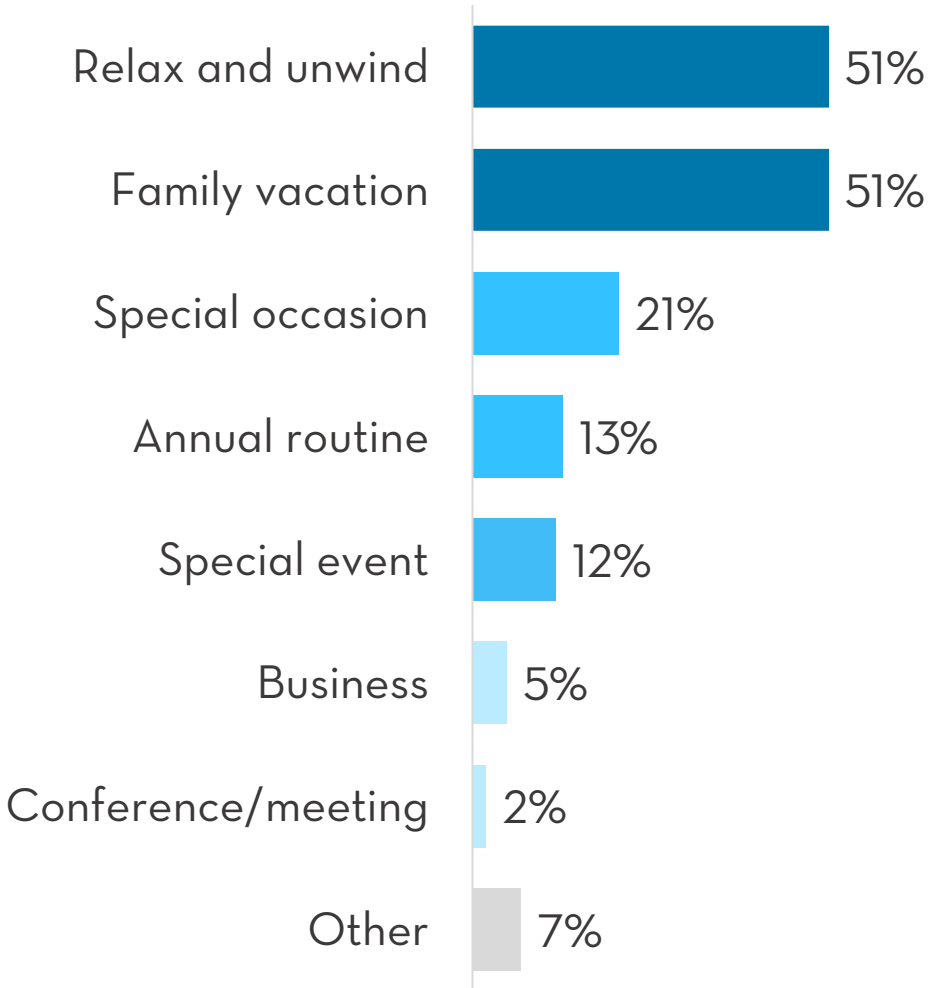
REASONS FOR VISITING¹



Over half of Winter visitors come to **relax and unwind** or for a **family vacation**



Over 1 in 5 visitors come to Walton County for a **special occasion**



¹Multiple responses permitted.

WALTON COUNTY PROMOTIONS¹



27% (+2% points from 2025) of Winter visitors recall advertising, promotions, or travel stories for Walton County

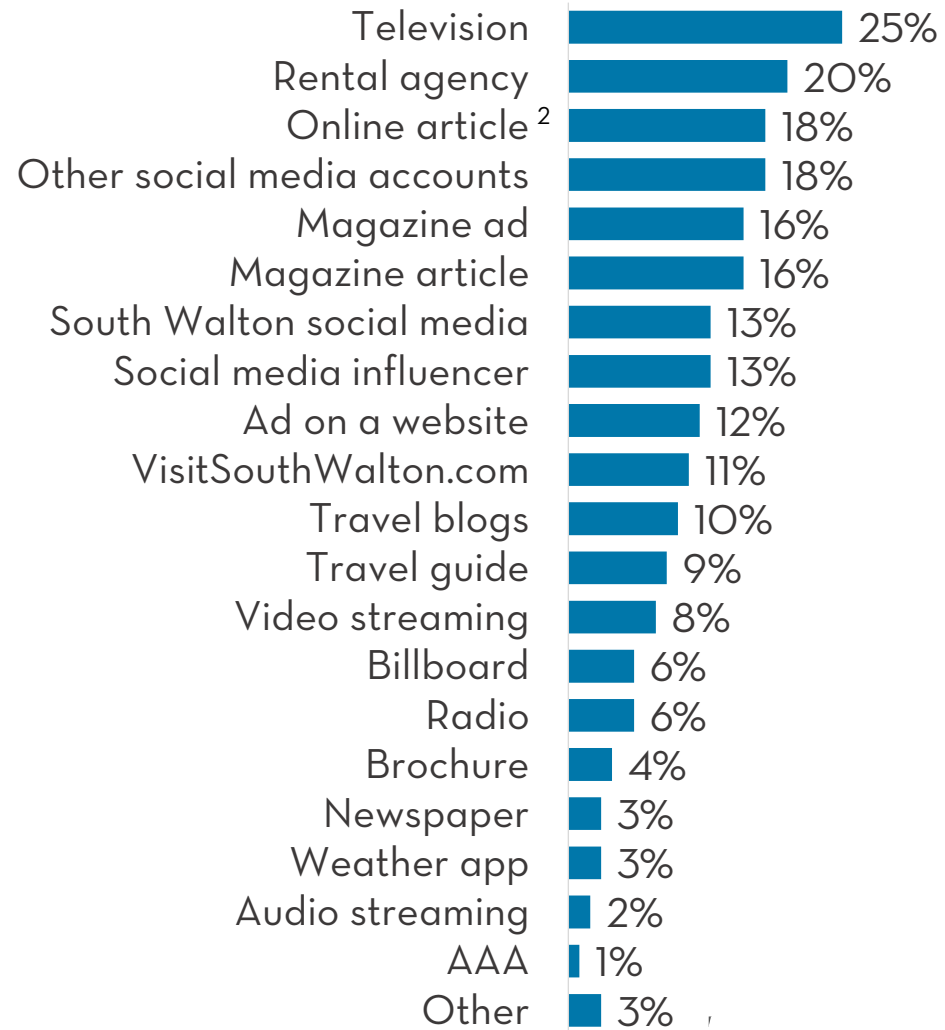


This information influences **13%** (+5% points from 2025) of all visitors to visit Walton County



Ad recall from **ads on a website**, **travel blogs**, and **video streaming** increased **3% points** from 2025.

Base: **27%** of visitors who recall advertising



¹Multiple responses permitted.

²These refer to social media accounts not associated with Walton County Tourism.

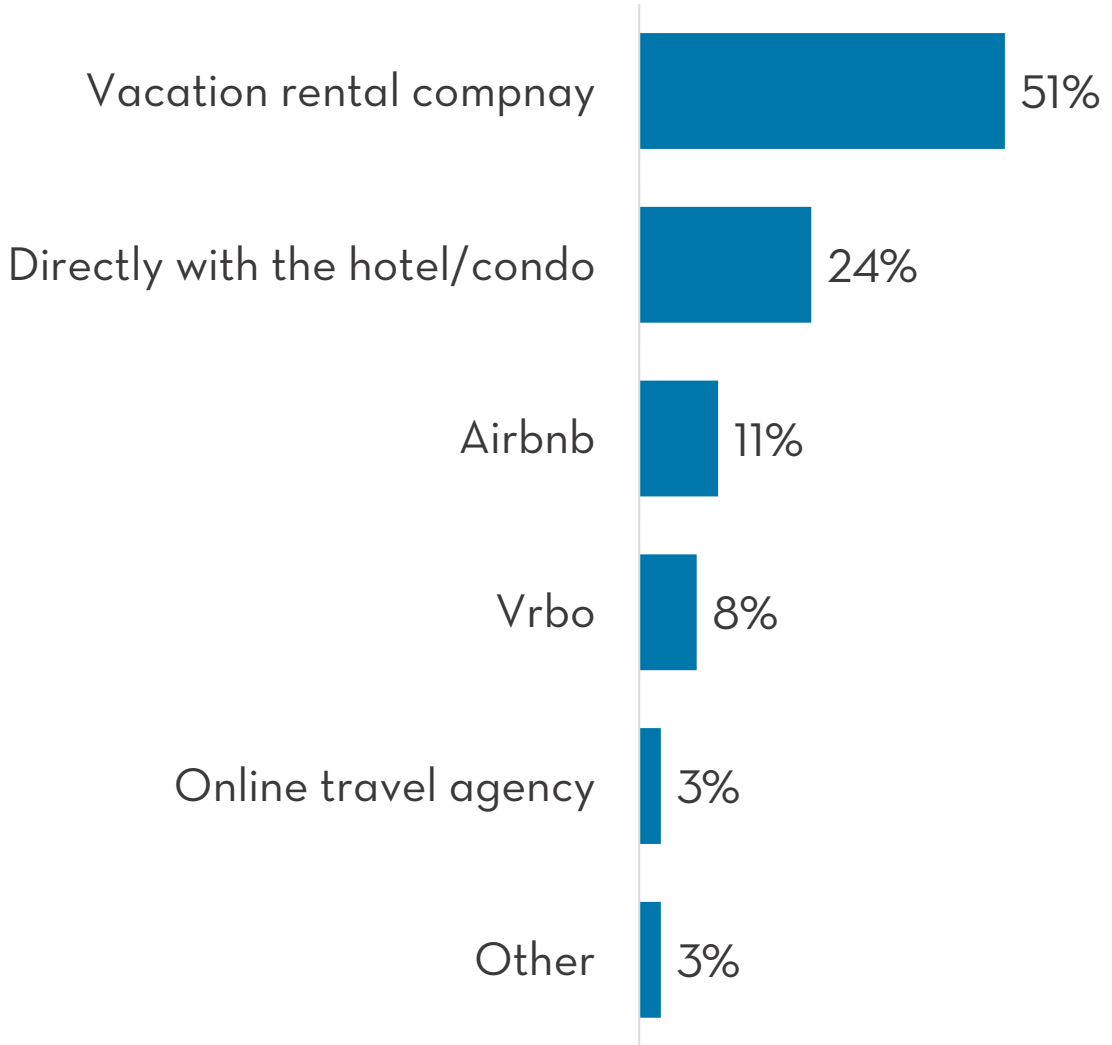
BOOKING ACCOMMODATIONS



Over half of visitors book accommodations through a **vacation rental company**



Nearly 1 in 4 Winter visitors book **directly with a hotel or condo**



VISITOR TRANSPORTATION

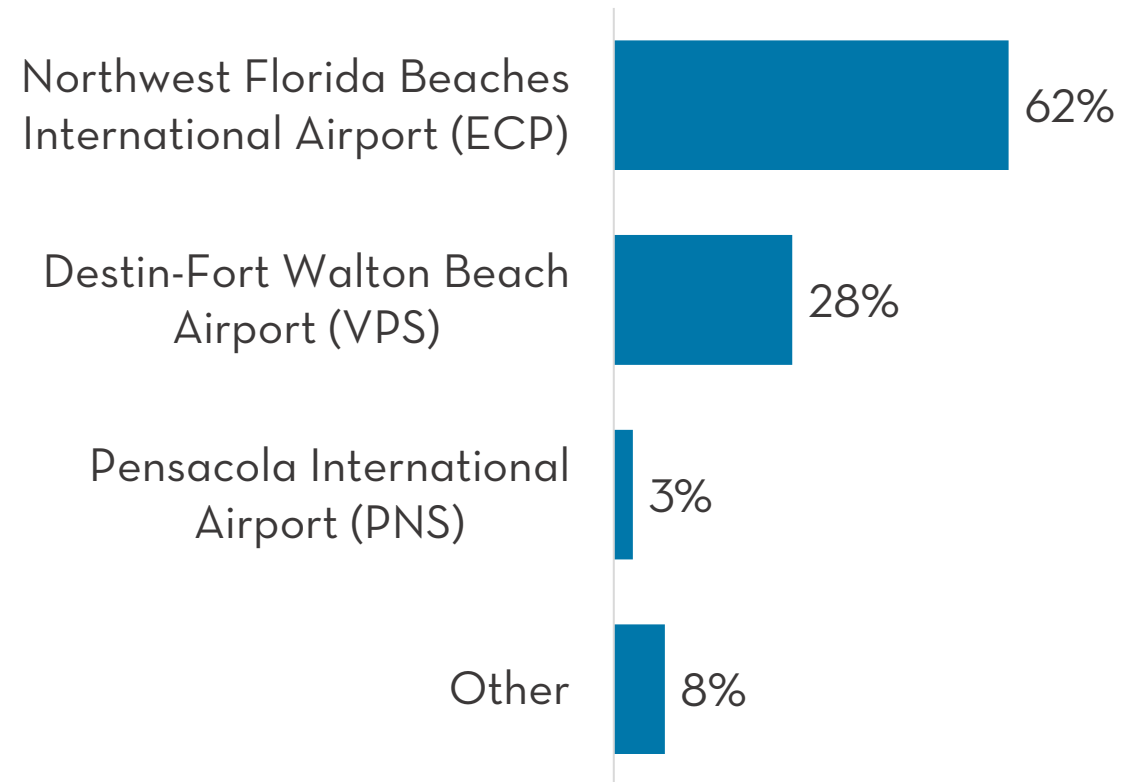


71% (-5% points from 2025) of Winter visitors drive to Walton County



22% (-2% points from 2025) of those who drive are aware that there are direct flights from their city to the Walton County area, and **16%** are not sure if there are direct flights available

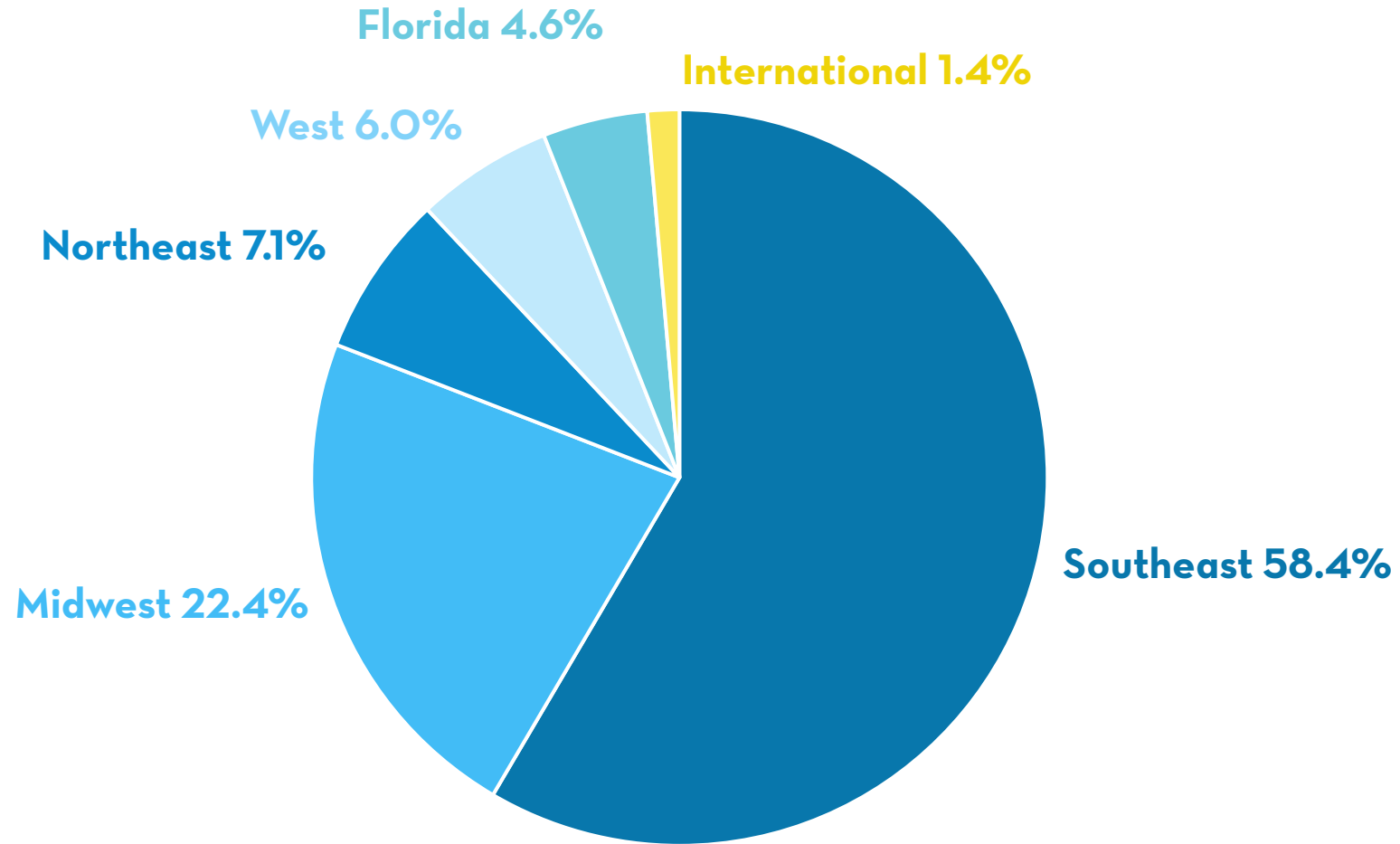
29% who **fly** use the following airports:



VISITOR JOURNEY: TRAVEL PARTY PROFILE

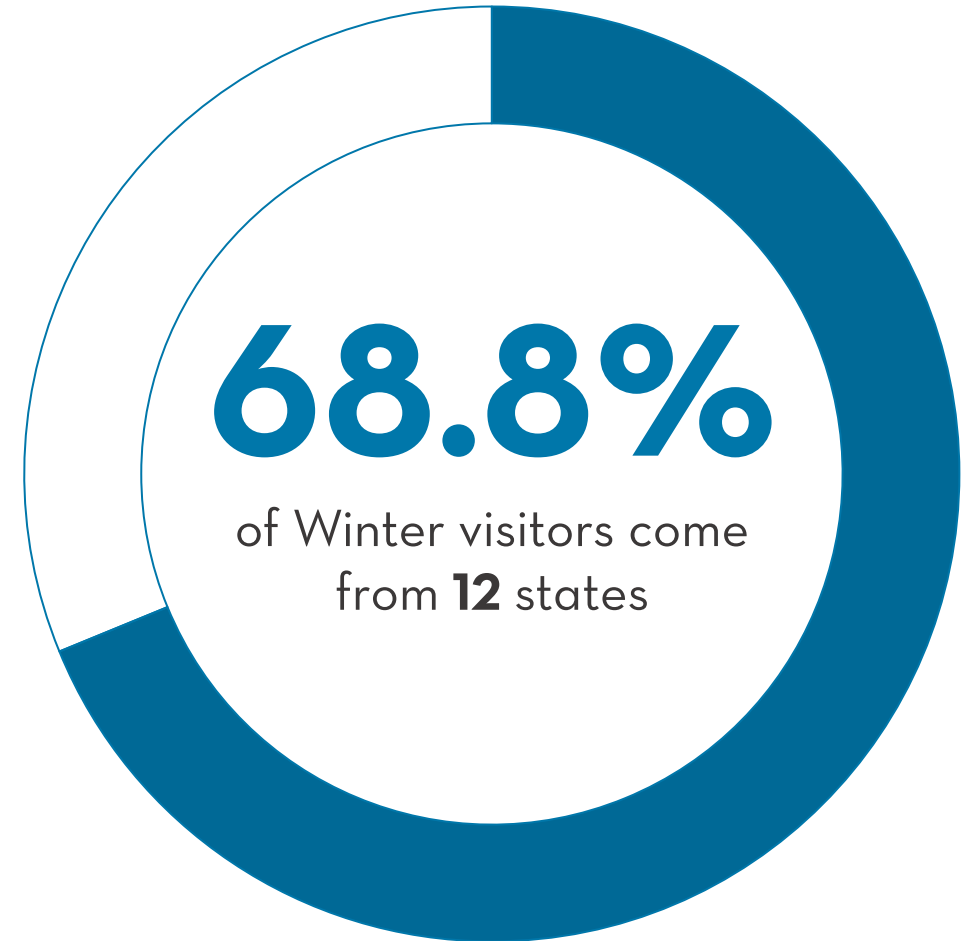


ORIGIN OF WINTER VISITORS



ORIGIN OF WINTER VISITORS

State	% of Visitors
Alabama	11.4%
Georgia	10.6%
Mississippi	8.9%
Tennessee	8.0%
Texas	7.7%
Florida	4.6%
Louisiana	3.3%
Ohio	3.1%
Illinois	3.0%
North Carolina	3.0%
Indiana	2.6%
Minnesota	2.6%



ORIGIN OF WINTER VISITORS

9.0% (-2.1% points from 2025) of all visitors come from the **Atlanta** market

5.1% (-3.2% points from 2025) of visitors are from the **Nashville** market

Alabama markets including **Mobile-Pensacola** (+2.3% points), **Birmingham** (+1.4% points), and **Huntsville-Decatur-Florence** (+0.9% points) saw year over year increases.

Other markets including **Dallas-Fort Worth**, **Charlotte**, **Kansas City**, **New York City**, and **Washington D.C.** also experienced year over year increases.

Top Origin Markets	% of Visitors
Atlanta	9.0%
Nashville	5.1%
Mobile-Pensacola	4.8%
Birmingham	3.8%
Columbus-Tupelo-West Point	3.6%
Dallas-Fort Worth	3.4%
Chicago	2.7%
Memphis	2.5%
Kansas City	2.2%
Houston	2.0%
Minneapolis-Saint Paul	2.0%
Huntsville-Decatur-Florence	1.9%

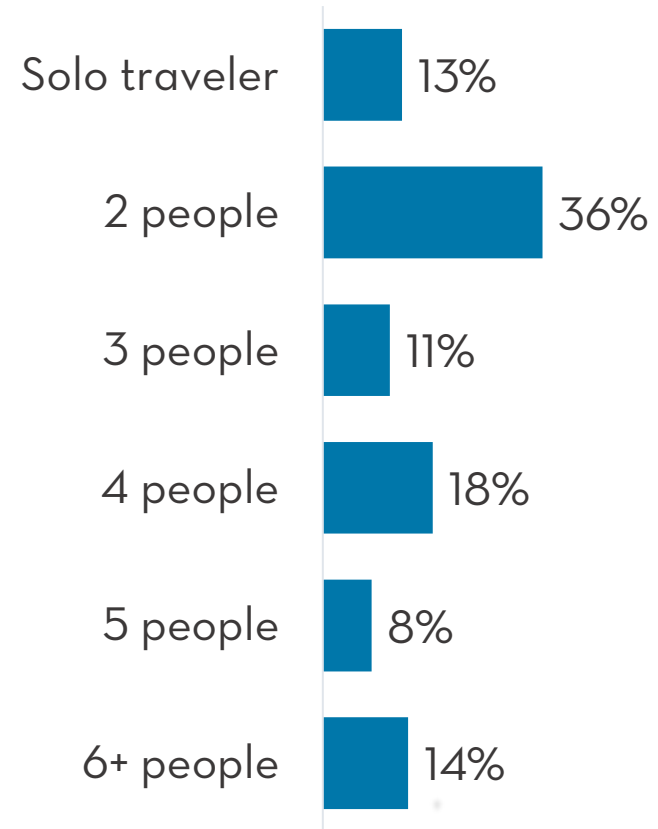
TRAVEL PARTY SIZE AND COMPOSITION



Visitors travel in a party composed of **3.4** people (3.5 in 2025)



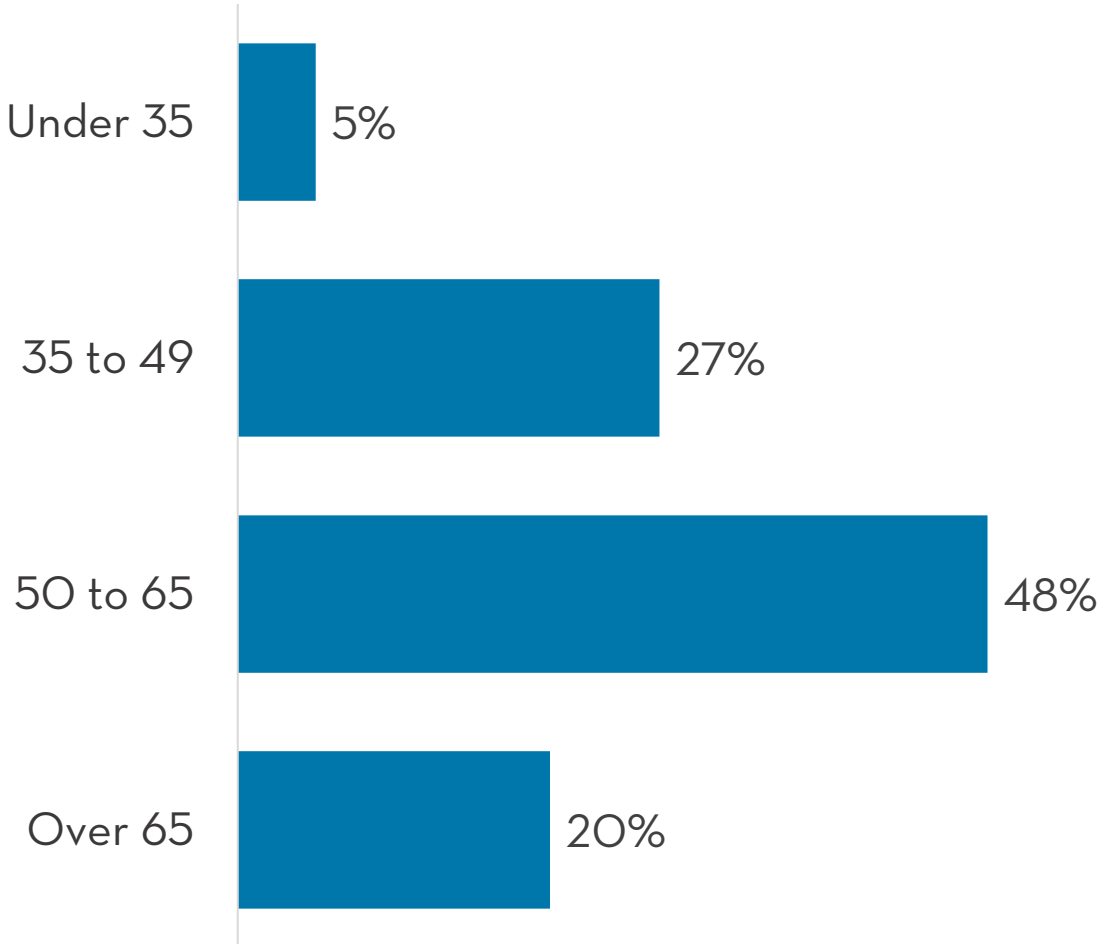
38% (+4% points from 2025) of visitors travel with children under the age of 20



AGE OF WINTER VISITORS¹



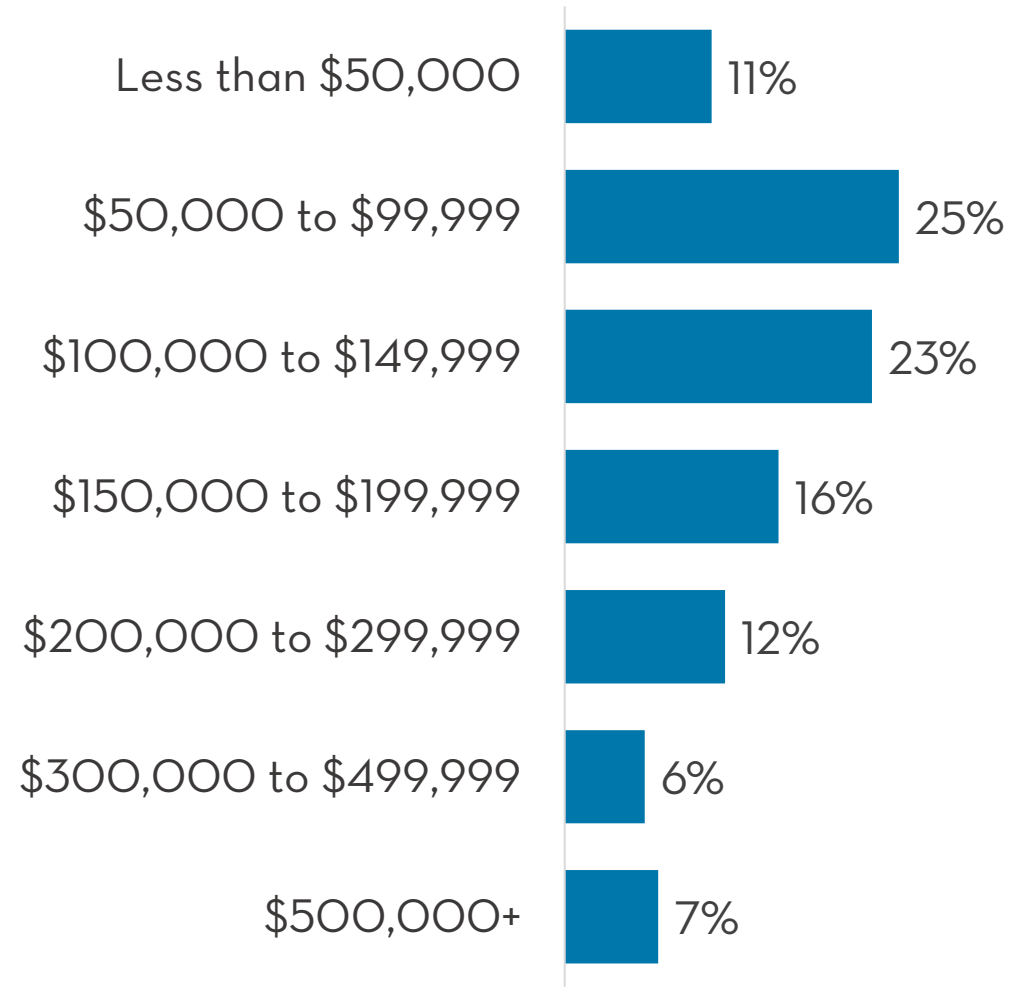
Median age of Winter visitors is **56 years old** (54 in 2025)



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

Winter visitors have a **median** household income of **\$130,400** (\$126,300 in 2025), while estimated **average** household income is **\$170,00** (\$172,800 in 2025)



VISITOR JOURNEY: TRIP EXPERIENCE



VISITOR ACCOMMODATIONS



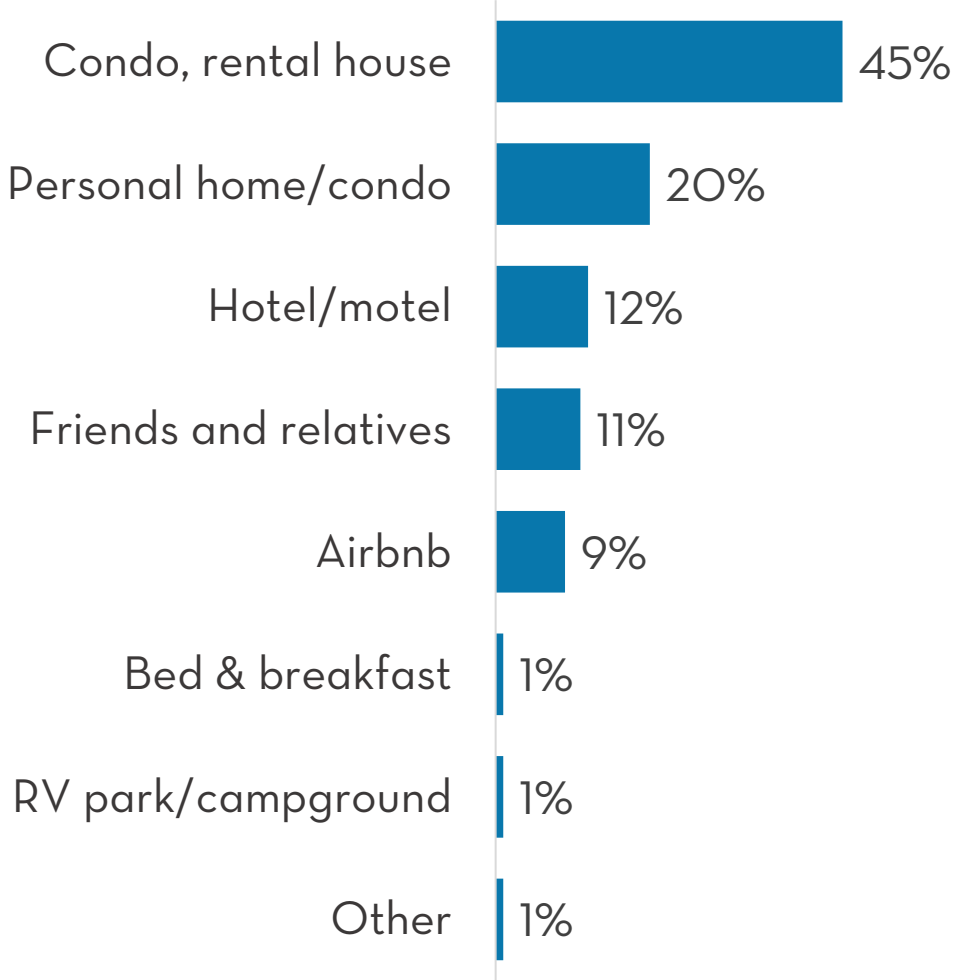
Nearly half of Winter visitors stay in a condo or rental house



1 in 5 visitors stay in their personal home or condo



12% stay in a hotel/motel



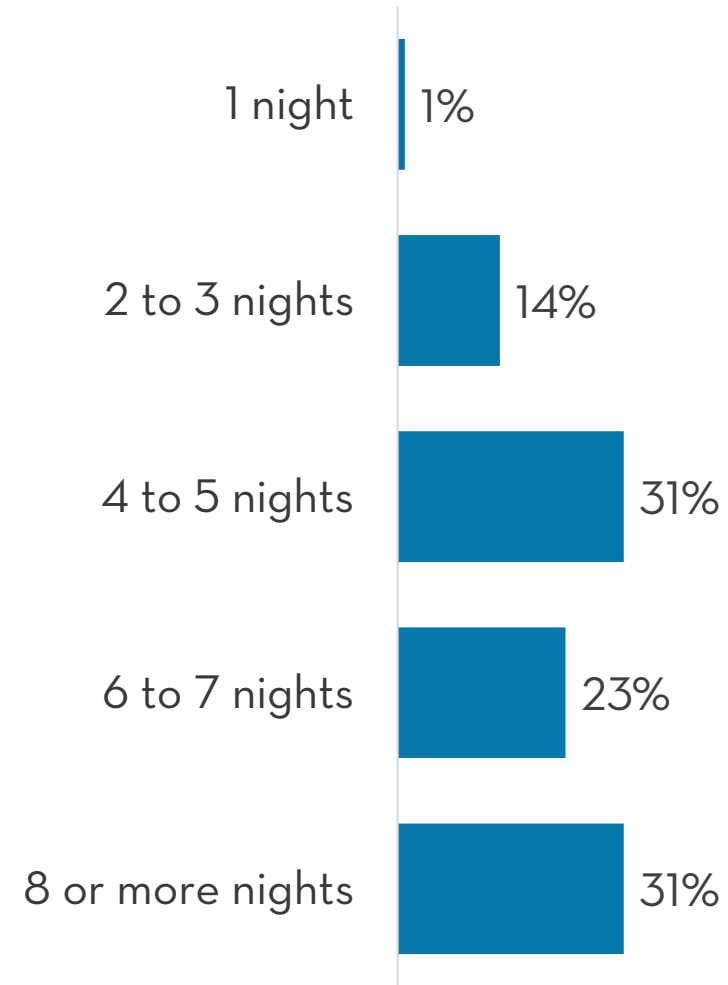
LENGTH OF STAY



Winter visitors¹ stay an average of **7.8** nights² in Walton County (7.4 nights in 2025)



Winter visitors staying in paid accommodations spend an average of **8.7** nights² in Walton County (8.5 nights in 2025)



¹Includes visitors staying paid accommodations, non-paid, and day trippers.

48 ²Visitors who stayed in Walton County up to 30 nights.

NUMBER OF VISITS TO WALTON COUNTY

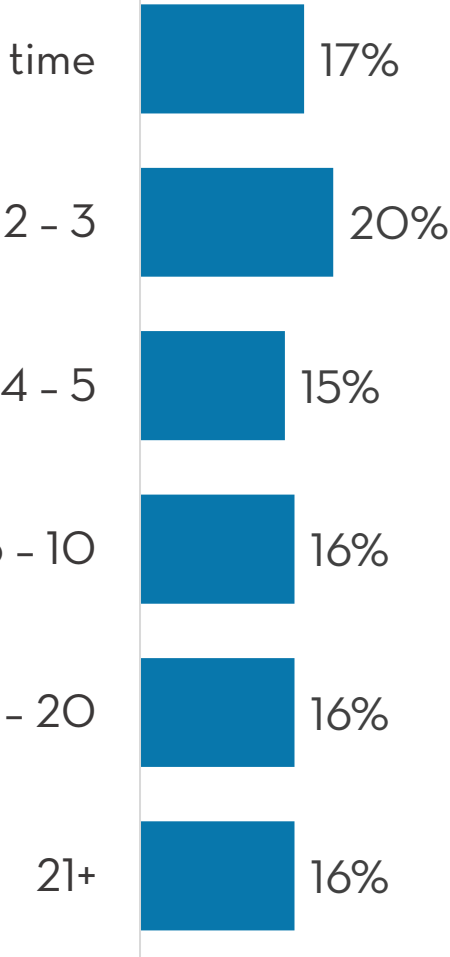


17% (+4% points from 2025) of Winter visitors are visiting for the first time

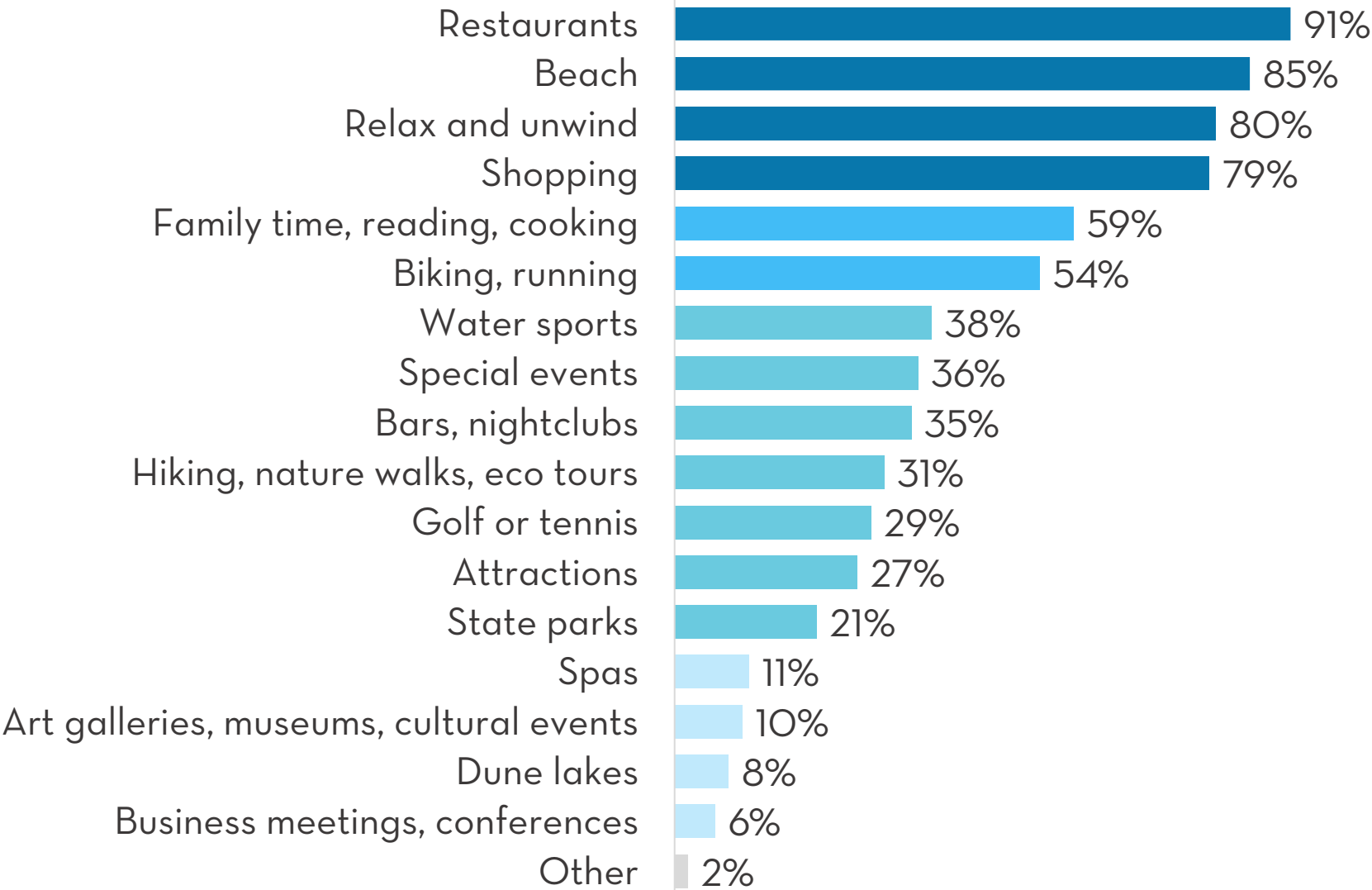


32% (-4% points from 2025) of Winter visitors have visited Walton County more than 10 times

That was my first time



VISITOR ACTIVITIES¹

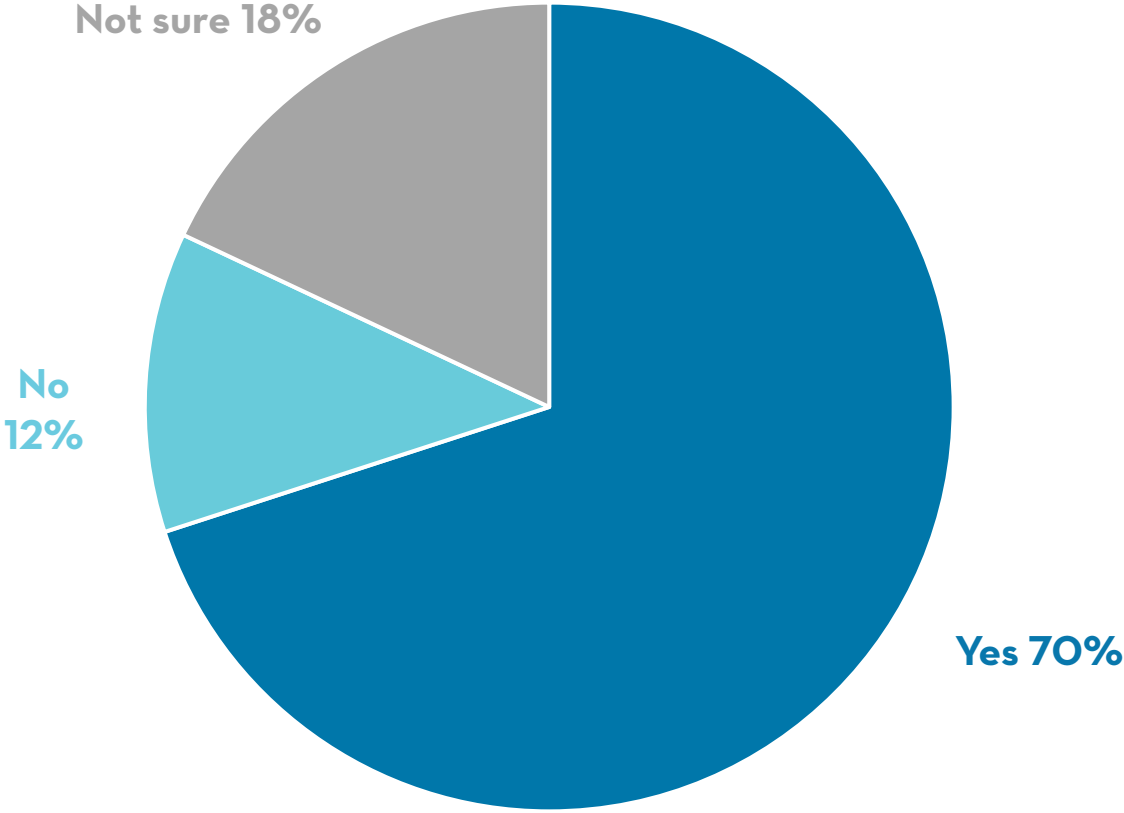


¹Multiple responses permitted.

BEACH SAFETY



70% of Winter visitors know there are flags posted along the beaches to indicate how safe it is to go into the water



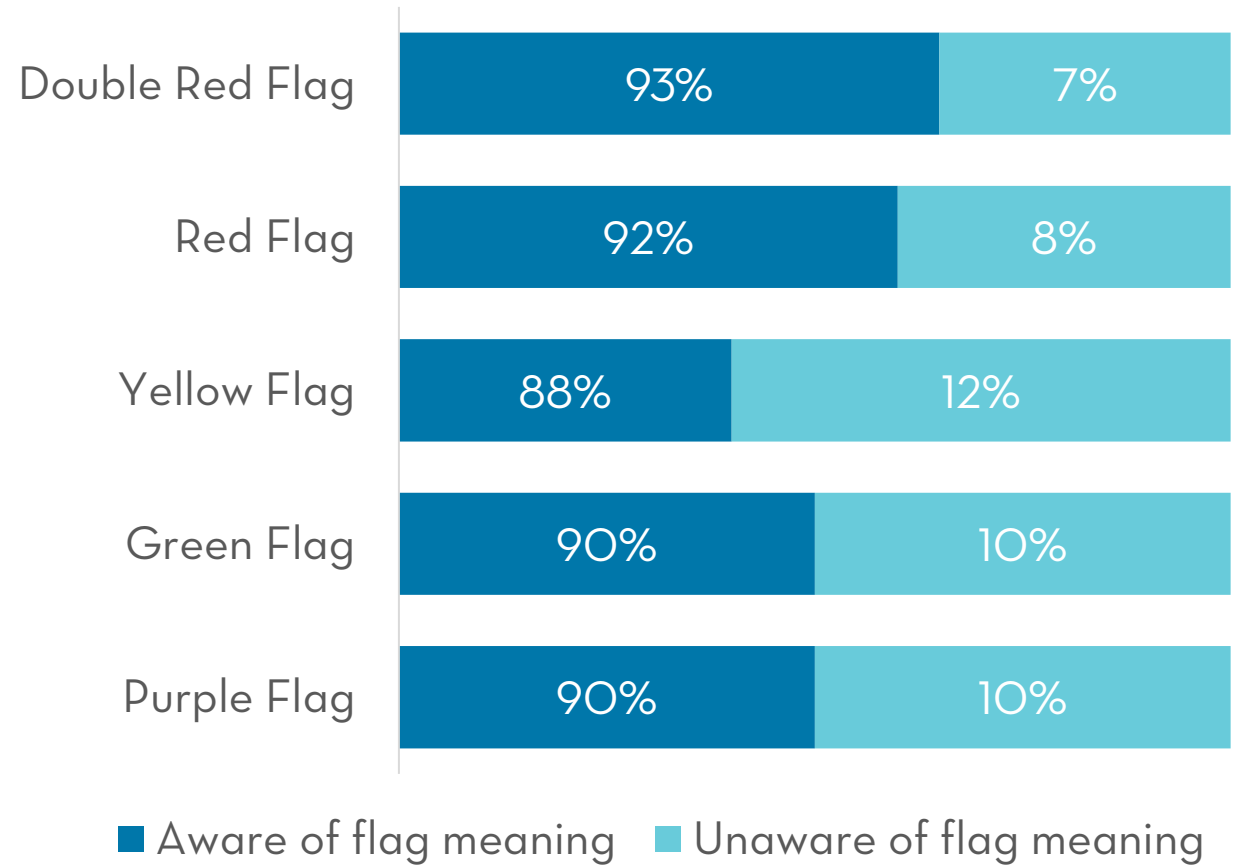
BEACH FLAG AWARENESS



Nearly 9 in 10 Winter visitors are aware of the meaning of each flag color



73% (+5% points from 2025) of Winter 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 **\$543** (\$509 in 2025) a day while in Walton County.
- » The typical travel party spends a total of **\$4,240** (\$3,760 in 2025) while visiting Walton County.

Spending Category ¹	Average Daily Expenditure	Total Trip Expenditure
Accommodations	\$177	\$1,380
Restaurants	\$121	\$940
Groceries	\$56	\$440
Shopping	\$102	\$790
Entertainment	\$38	\$300
Transportation	\$38	\$300
Other	\$11	\$90
Total	\$543	\$4,240

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 **9.3** (consistent with 2025) as a place to vacation

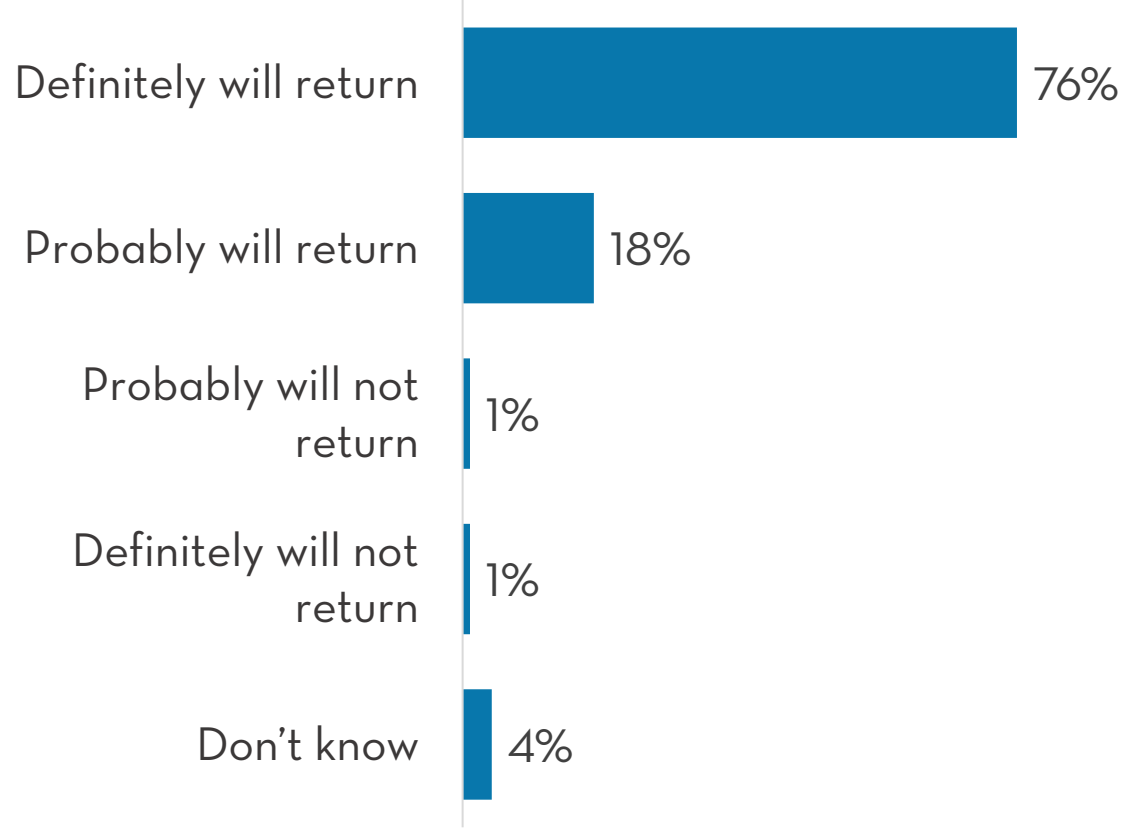


Over 3 in 4 winter visitors will definitely return to Walton County



Only 6% of visitors are uncertain about returning. Top reasons² include:

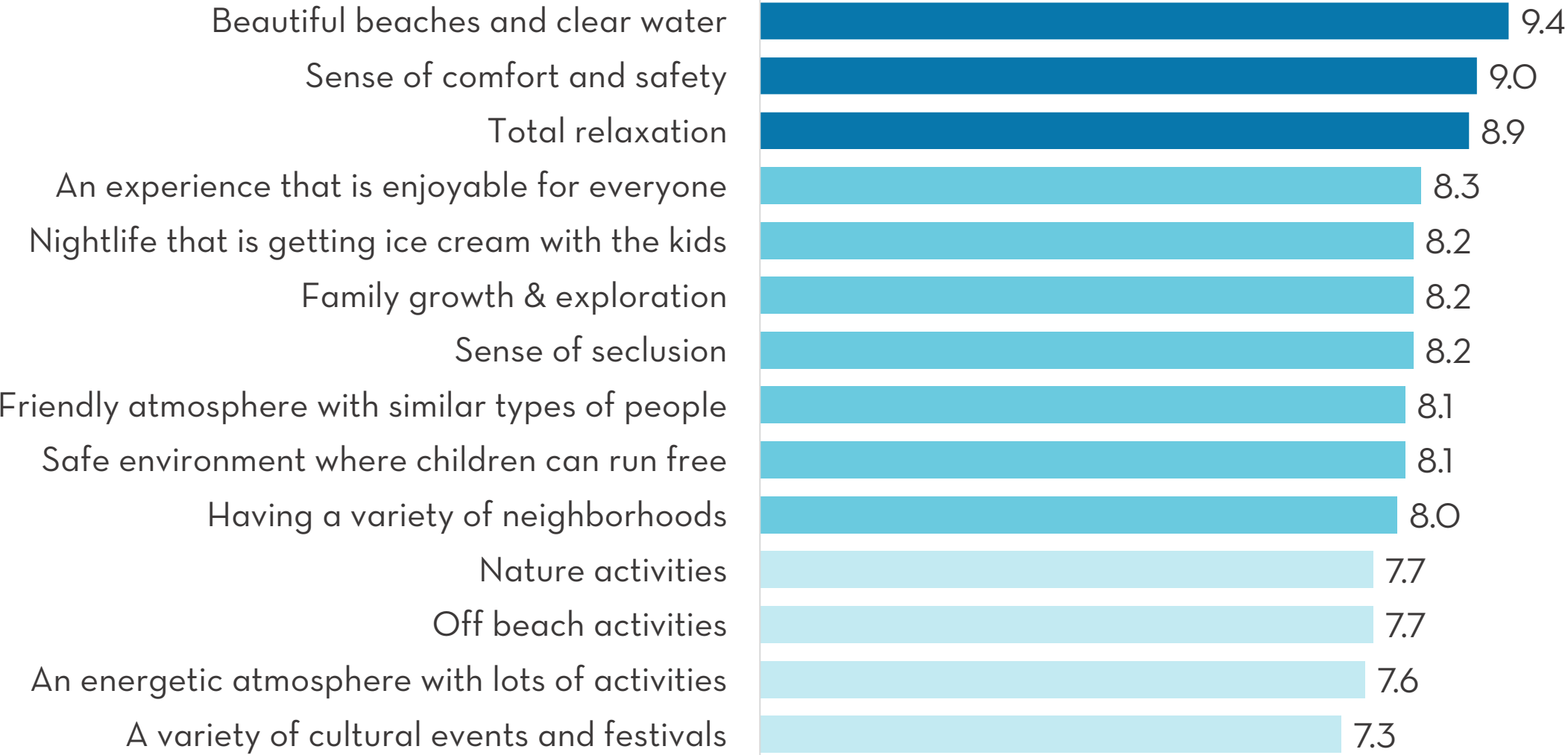
1. Not enough to do at night
2. Too expensive
3. Not enough to do during the day



¹10 = Excellent; 1= Poor

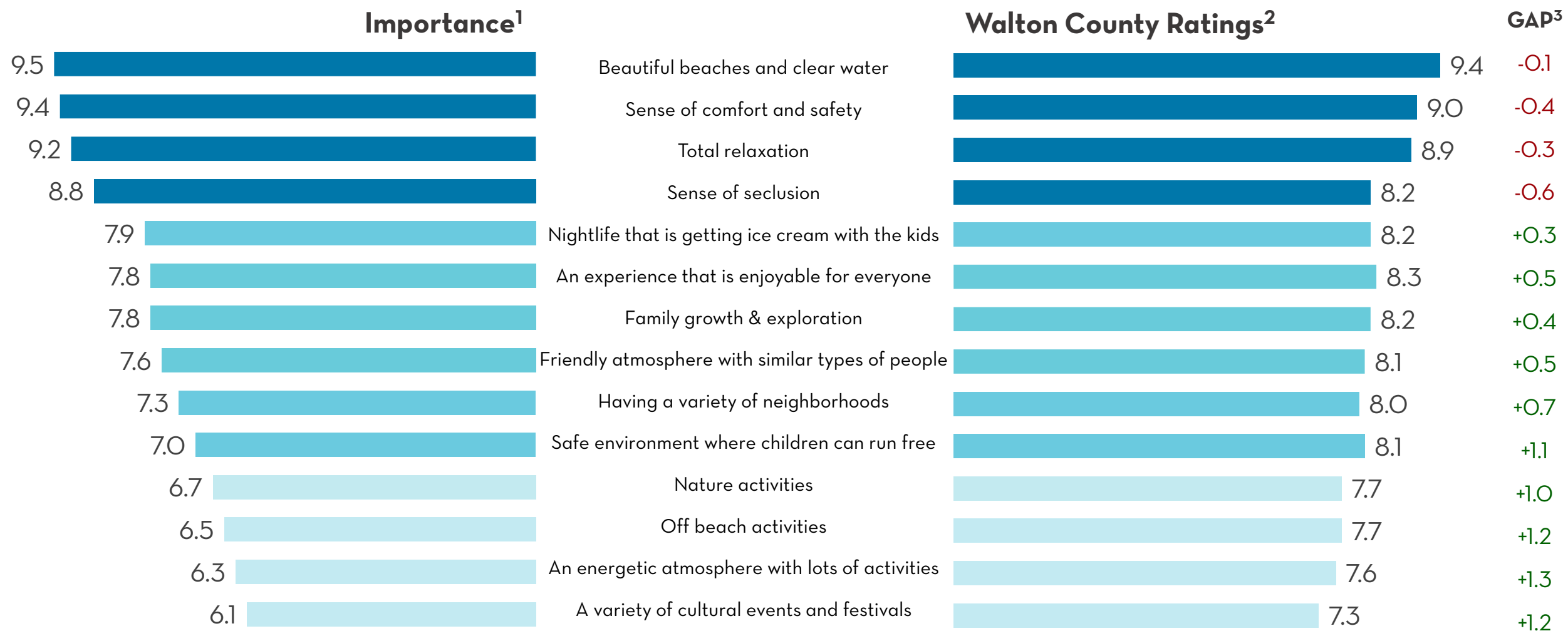
²Reason for uncertainty about returning to Walton County should be interpreted cautiously due to the small sample size answering the question.

RATING WALTON COUNTY ATTRIBUTES¹



¹ Rated 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 9.5. Visitors rated WC as 9.4 on its beaches. Hence, the GAP is -0.1.

AREA DESCRIPTIONS



"South Walton is a beautiful, peaceful place with stunning beaches, charming towns, and lots of outdoor activities like kayaking and hiking. It's perfect for relaxing and enjoying nature."

"An amazing upscale yet laid back beach destination."

"A cozy little beachfront town."

"A lovely, welcoming, and peaceful place."

"Beautiful beaches, good places to stay, good restaurants, good for biking and walking, fun shopping."

"Beautiful white sand beaches. Many great restaurants in unique communities. Nearby parks, historical sites and shopping."

"Paradise."

"It's a marvelous adventurous place with good variety of options to choose from."

AREA DESCRIPTIONS



"Lots of different accommodations, wonderful restaurants, beautiful white sand beaches, Caribbean blue water, and fun activities."

"A peaceful place to make memories, enjoy with family, and explore arts & culture."

"Fun place to visit in the winter. Moderate weather, uncrowded beaches, and lovely sunsets."

"A serene and kindly environment fitting for adventure and relaxation. Friendly folks, good food, and homely location."

"South Walton is an amazing experience! It goes by so quickly and is addicting! The beaches are always clean and unreal to look at and the main attractions are always fun for the whole family."

"Beautiful white beaches. Clean and safe with lots of beautiful beach houses and fantastic shopping."

"Beautiful serene beaches. The town of Rosemary Beach is like visiting another country, but so beautiful and clean. It's such a quaint town and so walkable."

FEELINGS ASSOCIATED WITH WALTON COUNTY



"This time of year is so peaceful."

"This feels like a warm slice of heaven."

"Calm."

"All anxiety leaves with the sound of waves at the beach."

"We feel at home here."

"We enjoy the sunshine and white sandy beaches."

"Familiarity, relaxation, natural beauty."

"It brings us so much joy to be here."

"Quality time to enjoy time with my children."

"Excitement of being around sand and water."

"In awe of sunsets over the horizon."

"A day at the beach makes me happy."

OPPORTUNITIES FOR IMPROVEMENT



"Beautiful beach if you can find an entrance since the beaches are owned by residents & hotels which makes it difficult for the hundreds of people who do not live oceanfront."

"Great but the whole beach situation with chairs and blocking entrances etc. is a nightmare."

"Stunningly beautiful and wonderfully relaxing- in the off season only."

"Timing really dictates the experience."

WALTON COUNTY TOURISM

Winter 2026 Visitor Tracking Study December 2025 - February 2026

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