

# WALTON COUNTY TOURISM

## Fall 2023 Visitor Tracking Study

September 2023 – November 2023



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## Visitor Tracking Study

This report is based on 1,004 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 September 2023 and November 2023.

# EXECUTIVE SUMMARY



# SEASONAL SNAPSHOT

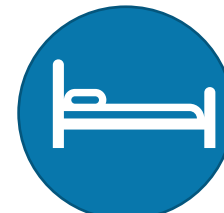
Fall 2023

- A decrease in the number of visitors and a 9.4% decrease in room rates led to a decrease in direct spending compared to Fall 2022.
- Decreases in occupancy and room rates led to a 17.5% decrease in RevPAR from Fall 2022.
- TDT collections decreased 2.3% in 2023 compared to 2022.
- With over 678 thousand visitors this Fall, total visitor spending was over \$841 million.
- Compared to importance that visitors place on vacation attributes, Walton County was rated lower on providing a sense of seclusion and total relaxation. Conversely, Walton County was rated much higher (than importance visitors place on attributes) for providing off beach activities and an energetic atmosphere with lots of activities
- The number of visitors who said they were influenced by advertising to book a trip to Walton County increased 2% from 2022.



**815,300**

**TOTAL  
VISITORS**



**678,600**

**ROOM  
NIGHTS**



**\$ 841,692,800**

**DIRECT  
SPENDING**

vs. 2022

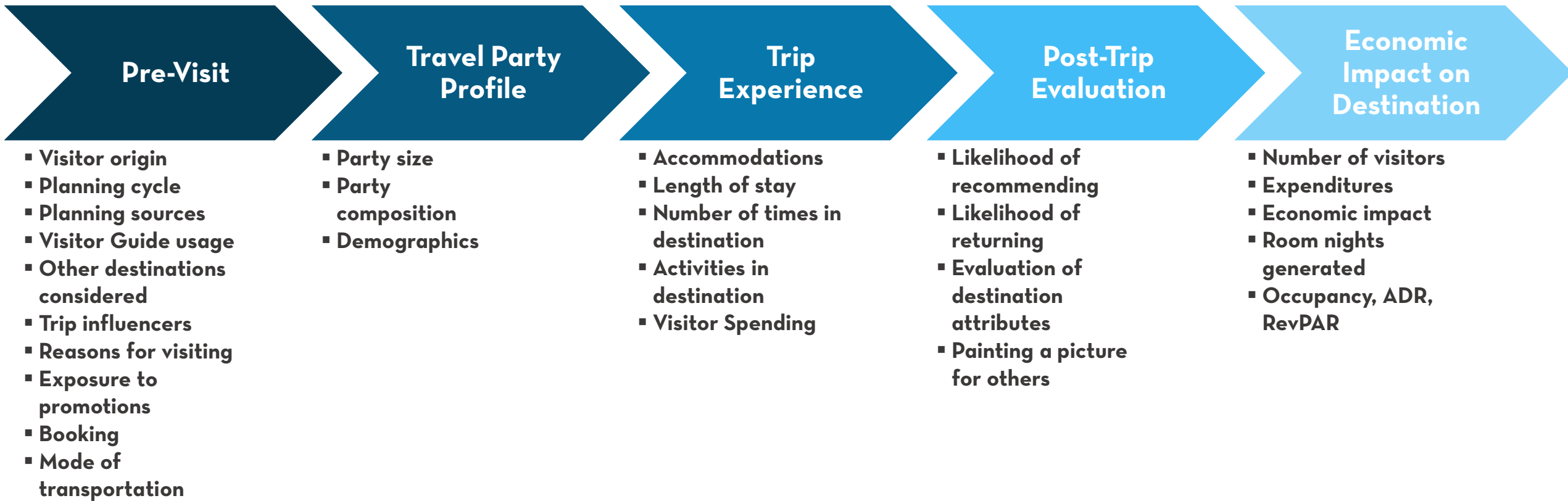
↓ 9.8%

↓ 1.9%

↓ 9.0%

# 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 – FALL 2022 VS. 2023

- » A decrease in the number of visitors and a 9.4% decrease in room rates led to a decrease in direct spending compared to Fall 2022.
- » Decreases in occupancy and room rates led to a 17.5% decrease in RevPAR from Fall 2022.
- » With over 678 thousand visitors this Fall, total visitor spending was over \$841 million.

Visitor Metrics	Fall 2022	Fall 2023	% Δ
Room nights	692,000	678,600	-1.9%
Total visitors	903,600	815,300	-9.8%
TDT collections	\$10,818,954	\$10,564,893	-2.3%
Direct spending	\$924,670,300	\$841,692,800	-9.0%
Economic impact*	\$1,322,278,500	\$1,205,494,500	-8.8%
Occupancy	41.4%	37.7%	-8.9%
Room rates	\$378.31	\$342.78	-9.4%
RevPAR	\$156.62	\$129.23	-17.5%

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

\*The economic impact multiplier for Walton County in 2023 is 1.45. In 2022 it was 1.43.



# ECONOMIC IMPACT - LODGING STATISTICS

**37.7%**

Occupancy

↓ 8.9%

**\$342.78**

ADR

↓ 9.4%

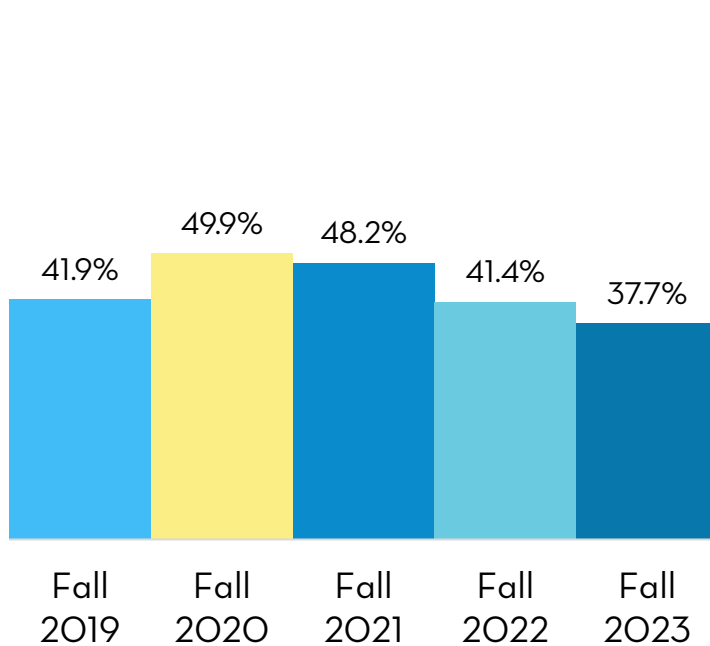
**\$129.23**

RevPAR

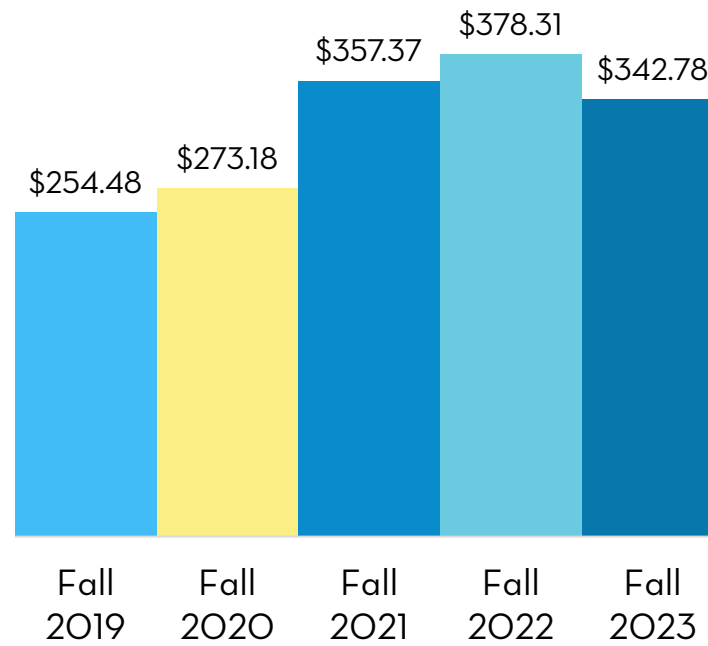
↓ 17.5%

# ECONOMIC IMPACT - LODGING METRICS

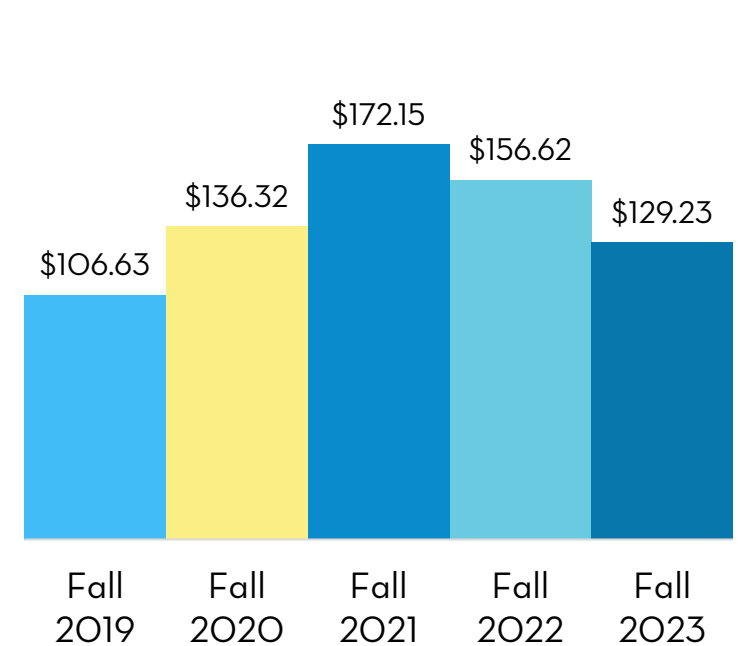
**Occupancy Rate**



**Average Daily Rate**

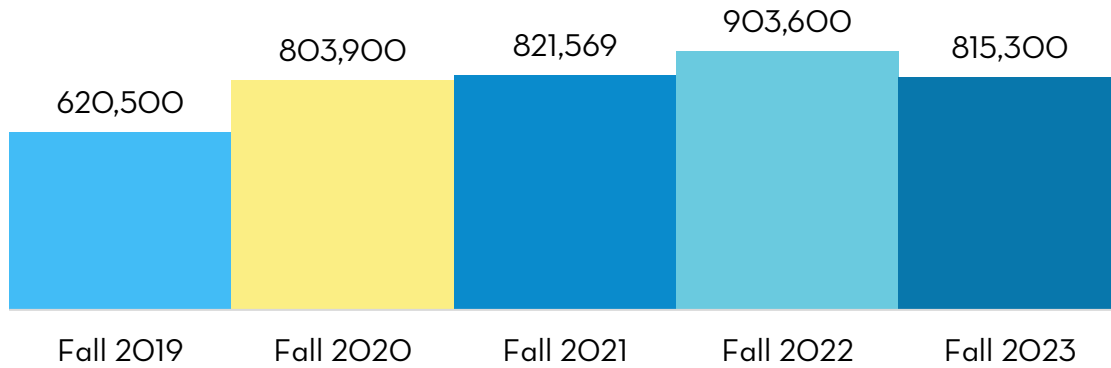


**Revenue per Available Room**

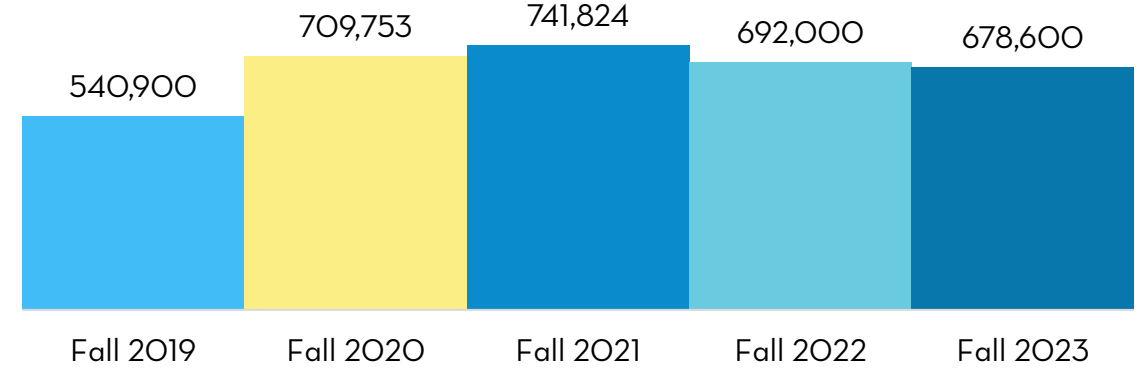


# ECONOMIC IMPACT - IMPACT OF TOURISM

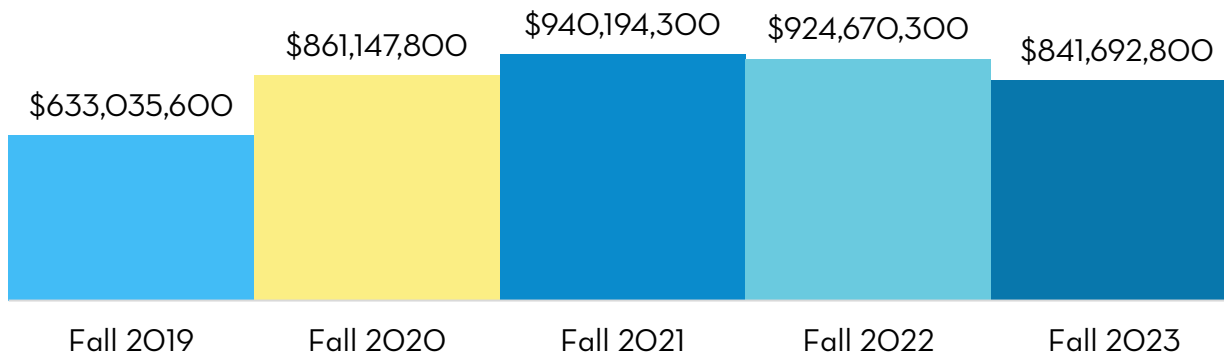
**Visitors**



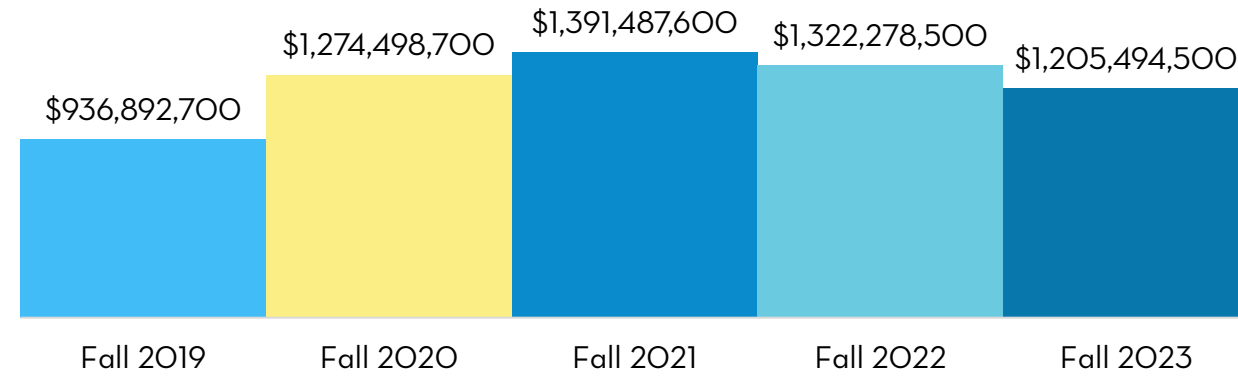
**Room Nights**



**Direct Spending**



**Economic Impact**



# VISITOR JOURNEY: PRE-VISIT





# PLANNING CYCLE

- » **Over 3 in 5** visitors plan a Walton County Fall vacation at least 3 months in advance
- » Average trip planning cycle began **97 days** before the trip (**96 days in 2022**)
- » **63%** (+5% points from 2022) of Fall visitors considered only 1 of the Walton County beach neighborhoods as opposed to deciding among several



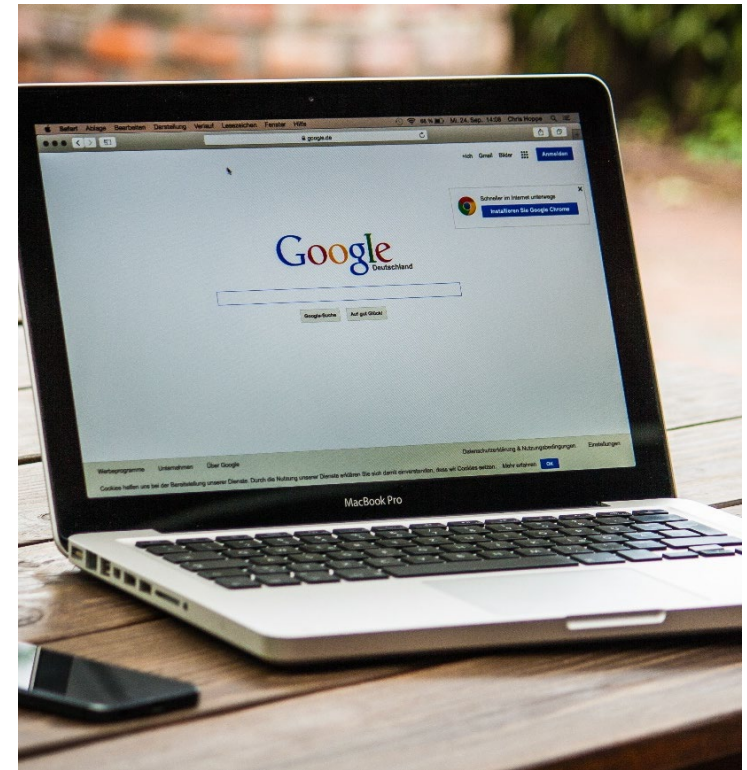
# TOP TRIP PLANNING SOURCES\*



Vacation rental website **47%**  
(55% in 2022)



Friends/family **38%**  
(38% in 2022)



Search engines **20%**  
(22% in 2022)

\*Multiple responses permitted.



# WALTON COUNTY VISITOR GUIDE

- » **1 in 5** visitors viewed (mostly online) Walton County's Visitors Guide before going to the area
- » Visitors Guide received a rating of **8.6 out of 10<sup>1</sup>** (+0.1 points from 2022)



# TOP REASONS FOR VISIT\*



Family vacation **59%**  
(55% in 2022)



Relax & unwind **55%**  
(58% in 2022)



Annual routine **23%**  
(23% in 2022)



Special occasion **17%**  
(17% in 2022)



# EXPOSURE TO ADVERTISING

- » **24%** (-3% points from 2022) of visitors recalled promotions about Walton County
- » This information influenced **6%** (+2% points from 2022) of all visitors to visit Walton County



# TOP WALTON COUNTY PROMOTIONS\*

Base: 24% of visitors who noticed advertising



Television **25%**  
(27% in 2022)



South Walton social media **23%**  
(24% in 2022)



Magazine ad **21%**  
(17% in 2022)

\*Multiple responses permitted.



# TOP BOOKING SOURCES



Vacation Rental Company

**61%**



Directly with hotel/condo

**22%**



VRBO/HomeAway

**8%**



# VISITOR TRANSPORTATION

- » **76%** of visitors drove to Walton County
- » **24%** (+2% points from 2022) who flew used the following airports:

**64%**

Northwest Florida Beaches  
International Airport



**26%**

Destin-Ft. Walton Beach Airport



**4%**

Pensacola International Airport

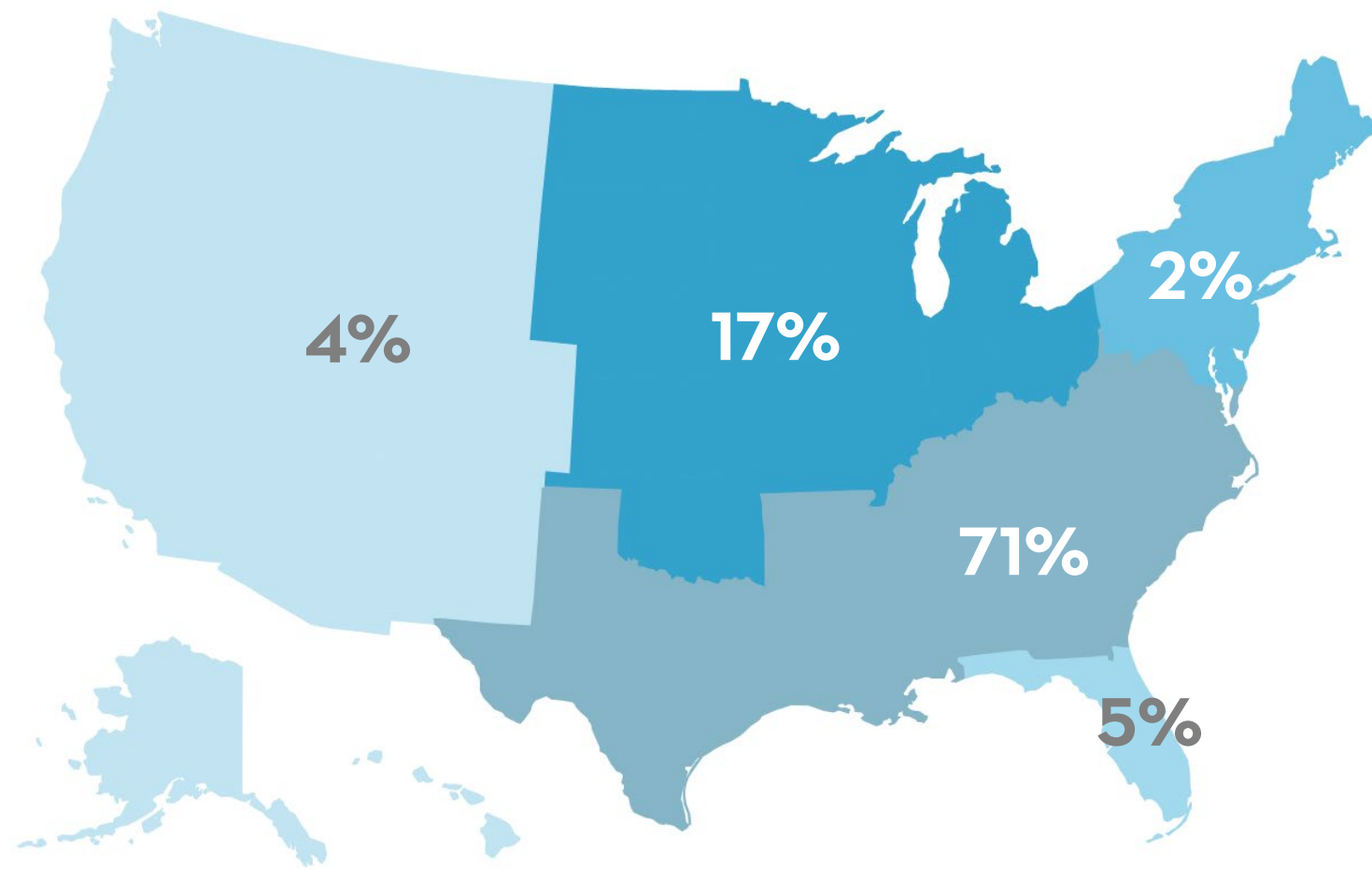




# VISITOR JOURNEY: TRAVEL PARTY PROFILE

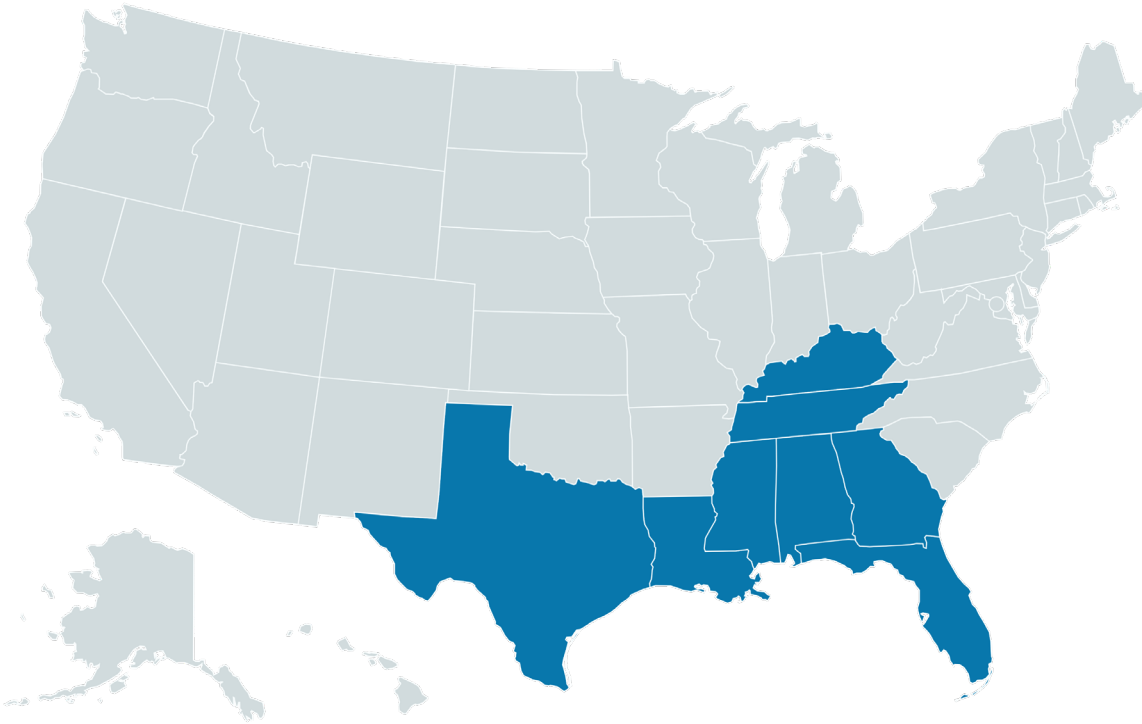


# ORIGIN OF FALL VISITORS



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

# ORIGIN OF FALL VISITORS



**74%** of visitors are from 8 states

**16%** Tennessee

**15%** Georgia

**11%** Alabama

**11%** Texas

**6%** Mississippi

**5%** Florida

**5%** Kentucky

**5%** Louisiana

**50%** of visitors are from 9 markets

**13%** Atlanta

**11%** Nashville

**5%** Dallas-Fort Worth

**5%** Memphis

**4%** Birmingham

**4%** Houston

**3%** Mobile-Pensacola

**3%** Columbus, OH

**3%** New Orleans

# TRAVEL PARTY SIZE AND COMPOSITION

The typical visitor traveled in a party composed of **4.2** people  
(-0.4 from 2022)



**41%** traveled with at least one  
person under the age of 20 in  
their travel party  
(-2% points from 2022)





# FALL VISITOR PROFILE

The typical Walton County Fall visitor:

- » **54** years old
- » Median household income of **\$144,700** (-\$16,400 from 2022)
- » From the Southeast (**71%**) (+4% points from 2022)



# VISITOR JOURNEY: TRIP EXPERIENCE



# TOP ACCOMMODATIONS

**63%** Condos, rental houses, etc.



**13%** Personal home/condo



**10%** Hotels





# LENGTH OF STAY

- » Visitors<sup>1</sup> spent **5.8** nights<sup>2</sup> in Walton County (+0.3 from 2022)
- » Visitors staying in paid accommodations spent an average of **6.1** nights<sup>2</sup> in Walton County (+0.5 from 2022)



<sup>1</sup>Includes visitors staying paid accommodations, non-paid, and day trippers.

<sup>2</sup>Visitors who stayed in Walton County up to 30 nights.

# FIRST-TIME AND EXPERIENCED VISITORS

- » **11%** (+1% points from 2022) were first-time visitors
- » **45%** (+2% points from 2022) had visited more than 10 times





# TOP VISITOR ACTIVITIES\*

Beach **87%**  
(91% in 2022)



Restaurants **85%**  
(89% in 2022)



Relax and unwind **75%**  
(80% in 2022)



Shopping **70%**  
(66% in 2022)



Family time, reading, cooking **60%**  
(63% in 2022)



\*Multiple responses permitted.



# BEACH SAFETY

- » **80%** of Fall visitors know there are flags posted along the beaches to indicate how safe it is to go into the water
- » **Over 4 in 5** Fall visitors are aware of the beach flag warning meanings
- » **61%** (+7% points from 2022) of Fall visitors are aware of the consequences of entering the Gulf during double red flag conditions



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

- » Travel parties spent **\$771** a day
- » Travel parties spent **\$4,450** on their trip



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

# VISITOR JOURNEY: POST TRIP EVALUATION



# VISITOR SATISFACTION

- » Visitors gave Walton County a rating<sup>1</sup> of **9.4** (+0.2 points from 2022) as a place to vacation
- » **83%** (+4% points from 2022) will definitely return to Walton County<sup>2</sup>



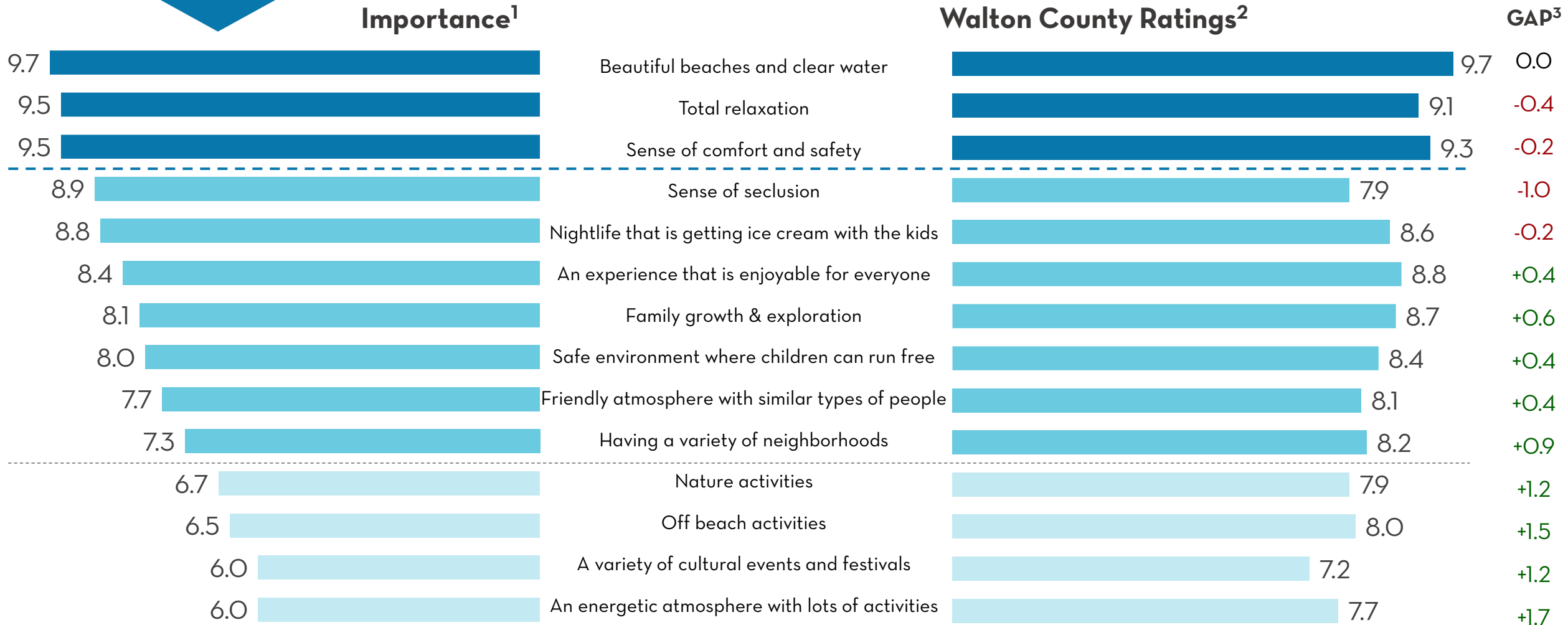
<sup>1</sup>10 = Excellent; 1= Poor

<sup>2</sup>3% of all visitors will not return to Walton County for the following reasons:

1. Too crowded 2. Too expensive 3. Not enough to do at night



# VACATION ATTRIBUTE IMPORTANCE VS. RATINGS



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

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

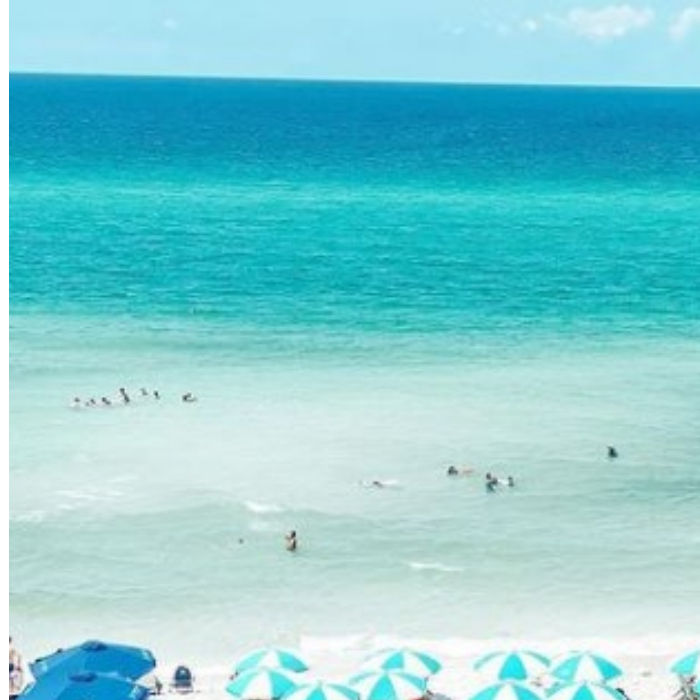
<sup>3</sup> GAP equals the difference between the importance of an attribute and the rating of WC on that attribute.

For example, a “sense of comfort and safety” is extremely important to visitors with a score of 9.5. Visitors rated WC as 9.3 on its ability to make them feel comfortable. Hence, the GAP is -0.2.

35

# VISITOR DESCRIPTIONS OF WALTON COUNTY

*"Beautiful white sandy beaches with crystal blue waters, super safe for kids and family-oriented. So many excellent restaurants and shopping. Wine, Jazz, and Art festivals and the farmer's markets are all excellent."*



*"Safe family place where the kids can run free without worry. Nice early evening curfew to eliminate trouble at night. Amazing place!"*



*"Gorgeous architecture. Feels like you've traveled abroad. Safe for the young adults to hang out and bike around."*



# YEARLY COMPARISONS





# VISITOR PROFILE – FALL 2022 VS. 2023

Visitor Metrics	Fall 2022	Fall 2023
Travel party	4.6	4.2
Kids <20	43%	41%
Median age	54	54
Estimated median household income	\$161,100	\$144,700
Stayed in condo/rental house	68%	63%
Drove	78%	76%
Nights spent	5.5	5.8
Direct expenditures (travel party for entire trip)	\$4,790	\$4,450
1 <sup>st</sup> time visitor	10%	11%
10+ visits to Walton County	43%	45%



# VISITOR PROFILE - FALL 2022 VS. 2023

Top Origin States	Fall 2022	Fall 2023
Tennessee	13%	16%
Georgia	17%	15%
Alabama	12%	11%
Texas	11%	11%
Mississippi	5%	6%

Origins - Regions	Fall 2022	Fall 2023
Southeast	67%	71%
Midwest	18%	17%
Florida	8%	5%
West	4%	4%
Northeast	2%	2%
International	1%	1%

# VISITOR PROFILE – FALL 2022 VS. 2023

Top Visitor Activities	Fall 2022	Fall 2023
Beach	91%	87%
Restaurants	89%	85%
Relax and unwind	80%	75%
Shopping	66%	70%
Family time, reading, cooking	63%	60%
Biking, running	42%	47%
Water sports	16%	27%
Bars, nightclubs	27%	24%
Golf or tennis	18%	24%
Special events	19%	23%
Hiking, nature walks, eco tours	19%	21%
State parks	18%	14%
Attractions	15%	14%
Spas	7%	9%
Dune lakes	12%	9%
Art galleries, museums, cultural events	7%	7%
Business meetings, conferences	1%	1%
Other	2%	2%

# VISITOR PROFILE – FALL 2022 VS. 2023

Visitor Metrics	Fall 2022	Fall 2023
Will return to Walton County	96%	98%
Rating for overall experience <sup>1</sup>	9.2	9.4
Viewed Visitors Guide <sup>2</sup>	20%	20%
Planned trip 6+ months out	26%	23%
Used VisitSouthWalton.com	14%	12%
Used 1 of 16 beaches' websites	17%	14%
Use the term "South Walton"	17%	12%

# DETAILED FINDINGS





# VISITOR JOURNEY: PRE-VISIT

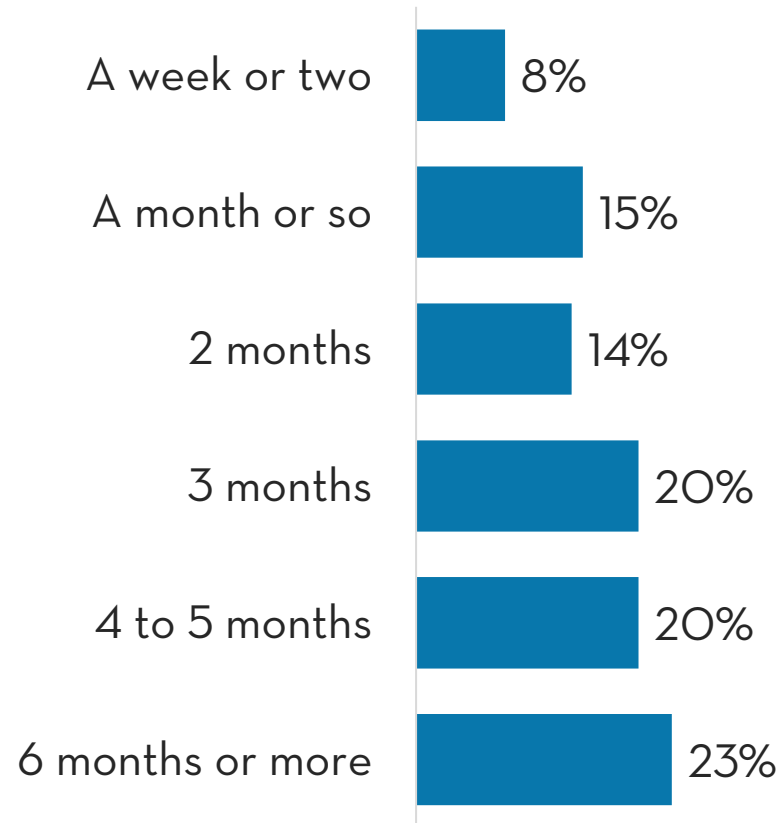


# PLANNING CYCLE


**Over 3 in 5** visitors plan a Fall Walton County vacation at least **3 months** in advance

**Nearly 1 in 4** visitors to Walton County have **a short (a month or less) planning cycle**


Average trip planning cycle began **97 days** before the trip (**96 days** in 2022)



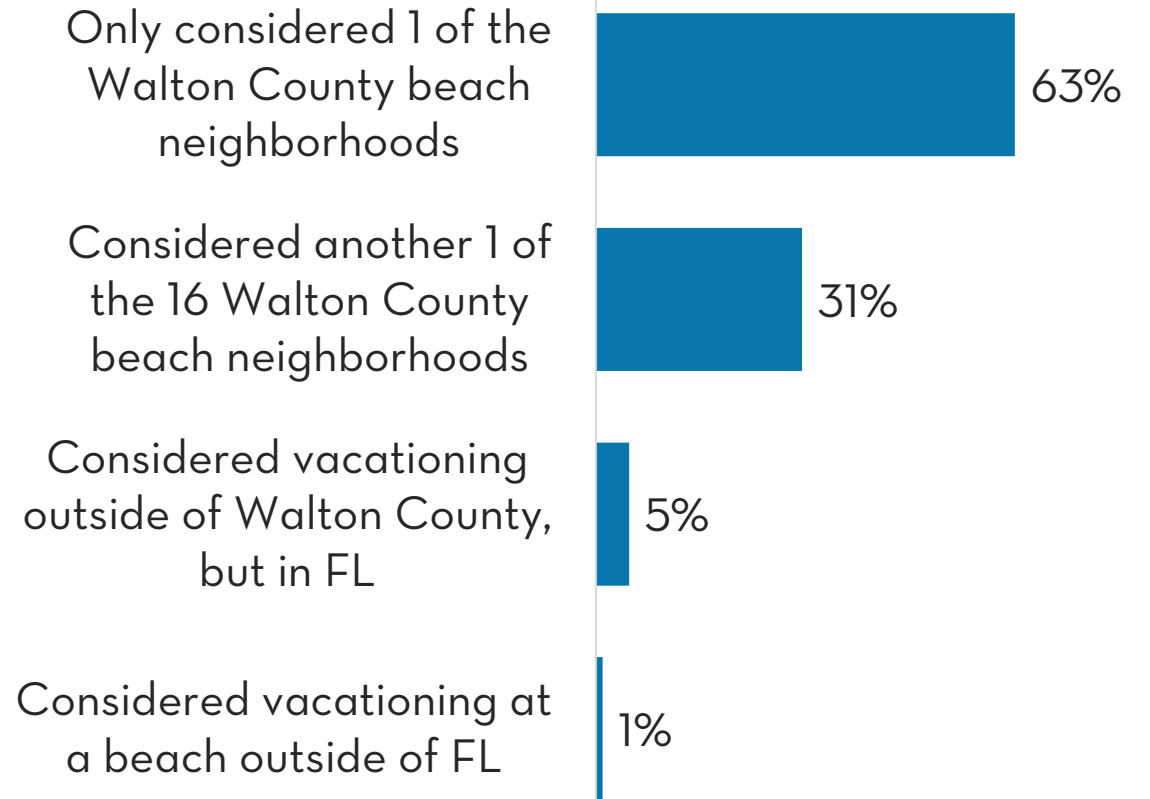
# OTHER DESTINATIONS CONSIDERED




**Over 3 in 5** (+5% points from 2022) of Fall visitors only considered going to the Walton County beach neighborhood where they stayed




**12%** use the term “South Walton” when referring to the area. Loyal visitors are significantly more likely to refer the destination as “South Walton” than first time visitors.




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



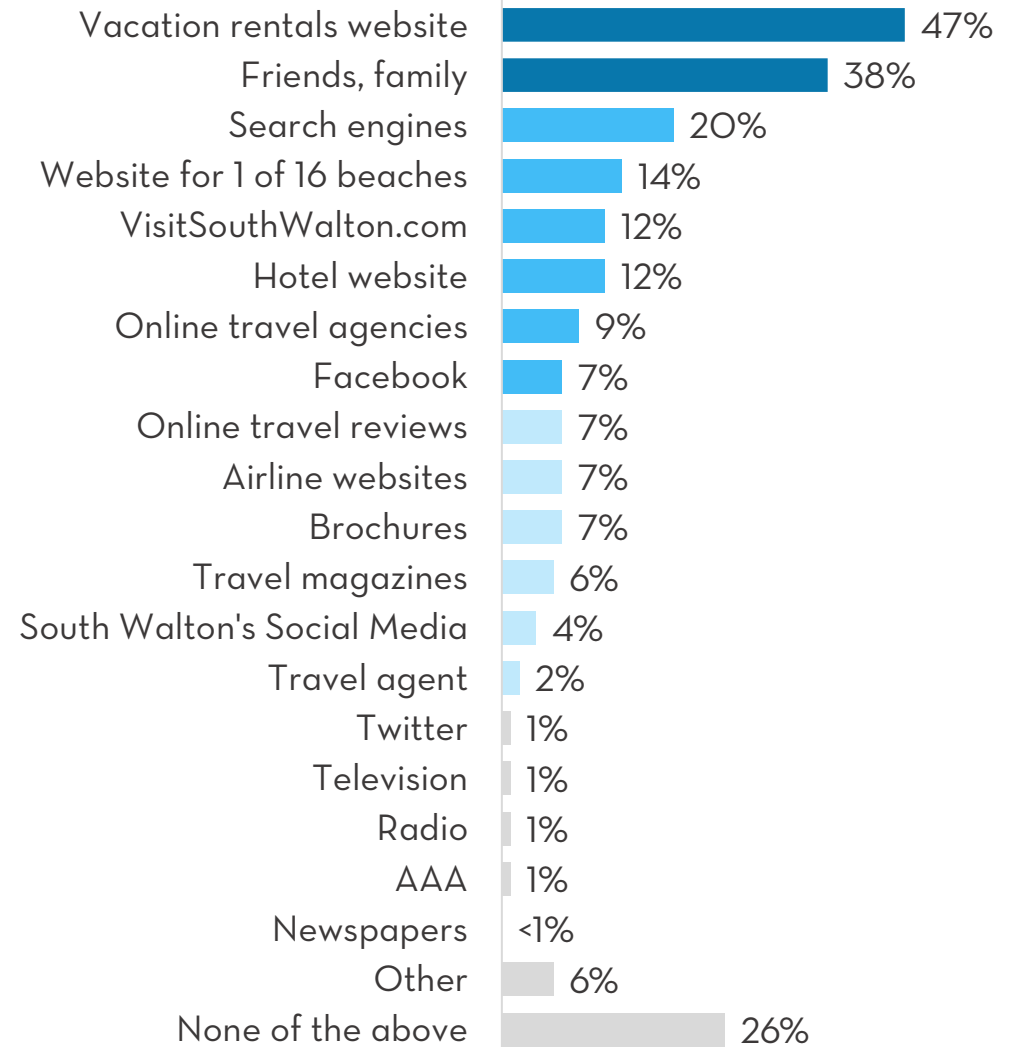
**Nearly half** of visitors used a vacation rental website to help plan their trip to Walton County



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



**1 in 5** visitors used search engines such as Google to help plan their trip to Walton County



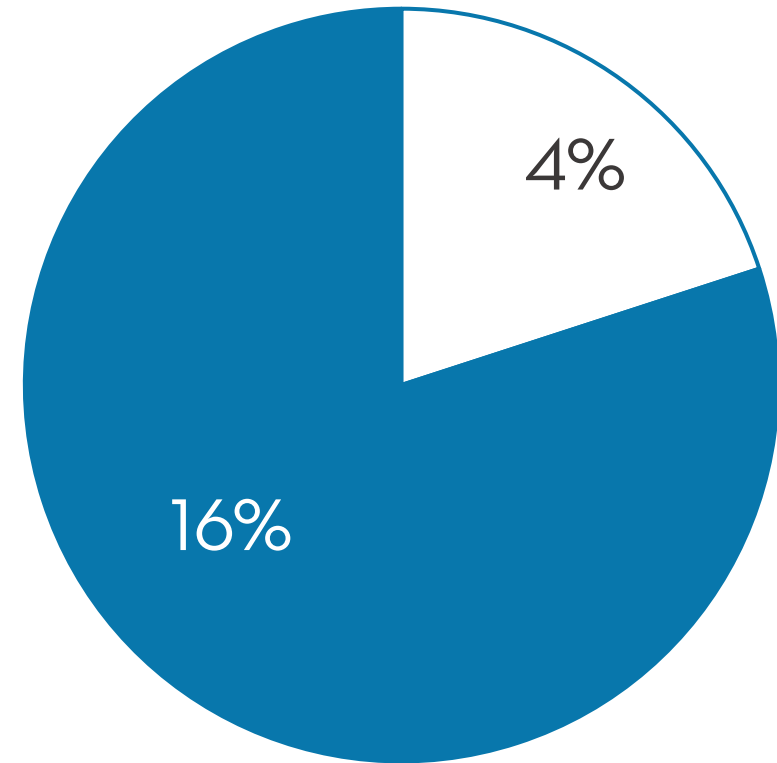
<sup>1</sup>Multiple responses permitted.



# WALTON COUNTY VISITOR GUIDE

**1 in 5** visitors viewed a Walton County Visitors Guide before going to the area

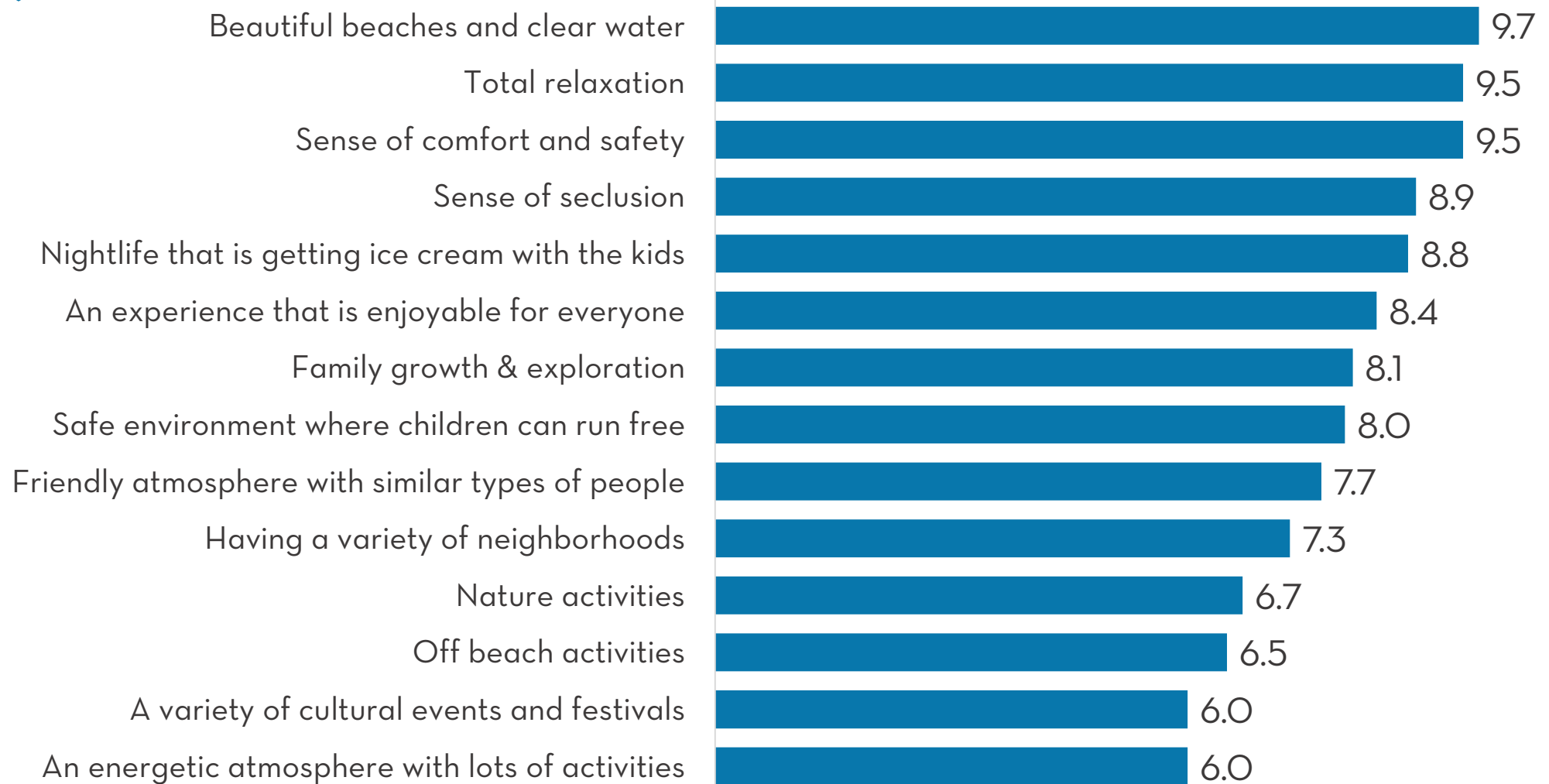
Visitors Guide received a rating of **8.6 out of 10**<sup>1</sup> (+0.1 points from 2022)



□ Print version    ■ Online version

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

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

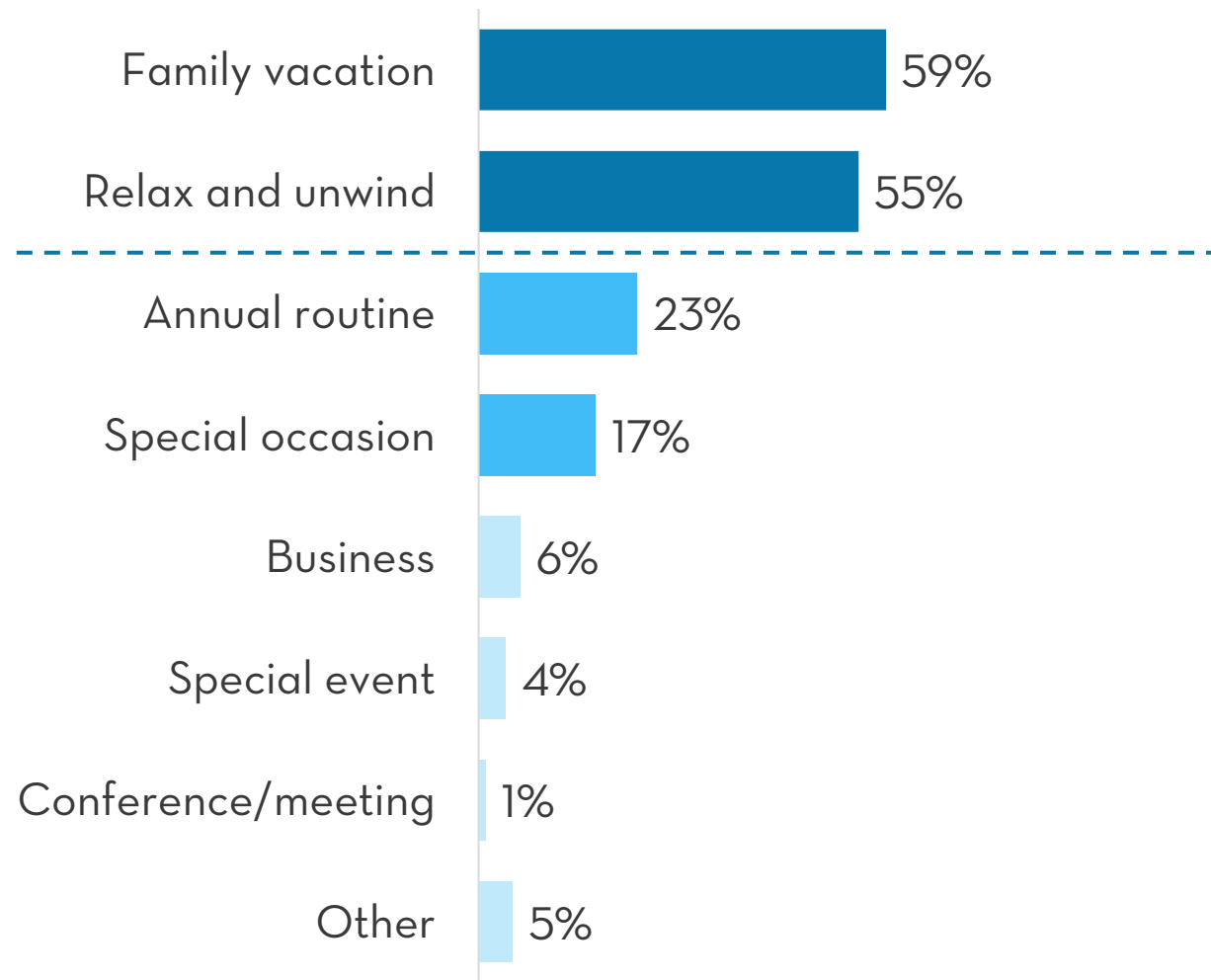


<sup>1</sup>Rated on a scale from 1 to 10 where 10 is very important and 1 is not at all important.

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

**Nearly 3 in 5** visitors visited Walton County for a **family vacation**

**Over half** of Fall visitors came to **relax and unwind**



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



**24%** (-3% points from 2022) of Fall visitors recalled advertising, promotions, or travel stories for Walton County

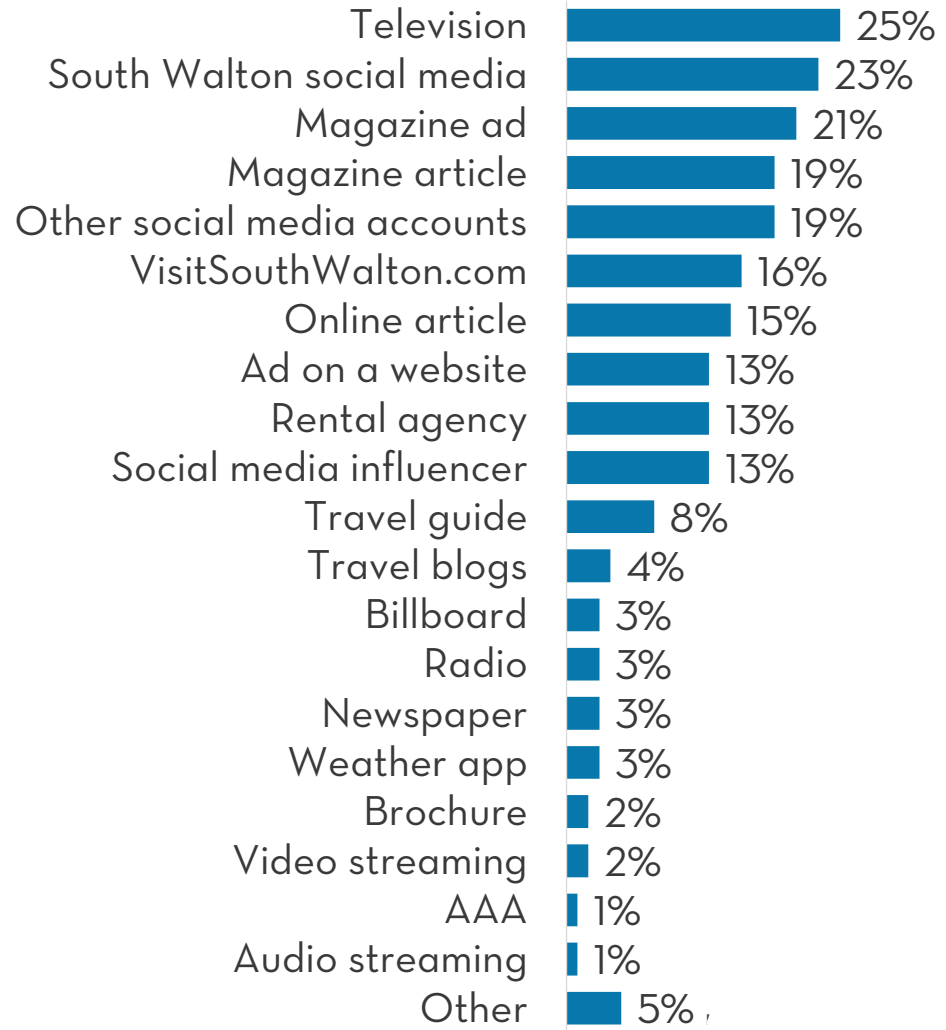


This information influenced **6%** (+2% points from 2022) of all visitors to visit Walton County



**23%** (-1% points from 2022) Fall visitors recalled information about the destination on **South Walton social media**

Base: **24%** of visitors who recalled advertising



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



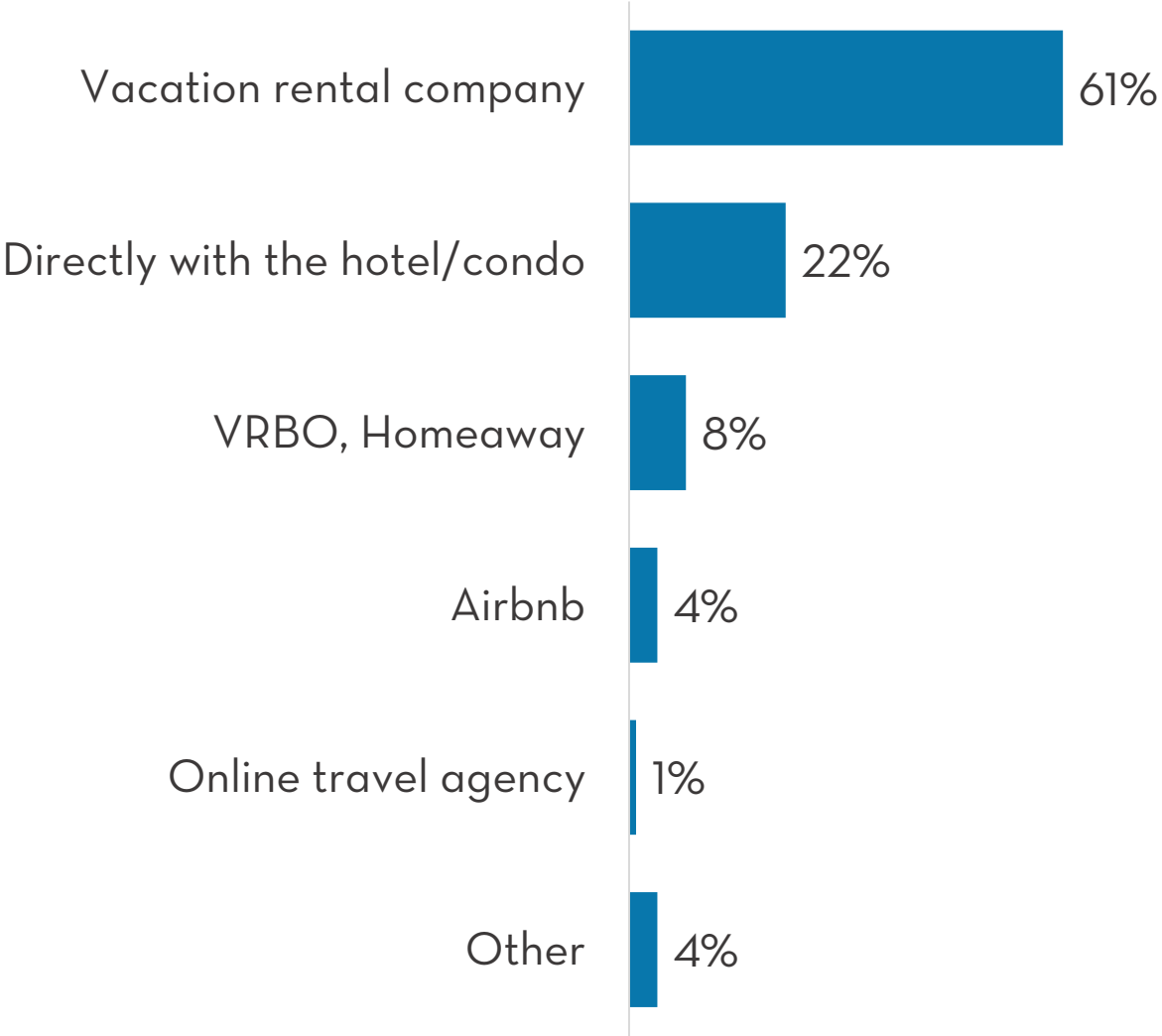
# BOOKING ACCOMMODATIONS



**3 in 5** visitors booked accommodations through a **vacation rental company**




**Over 1 in 5** Fall visitors booked **directly with a hotel or condo**



# VISITOR TRANSPORTATION

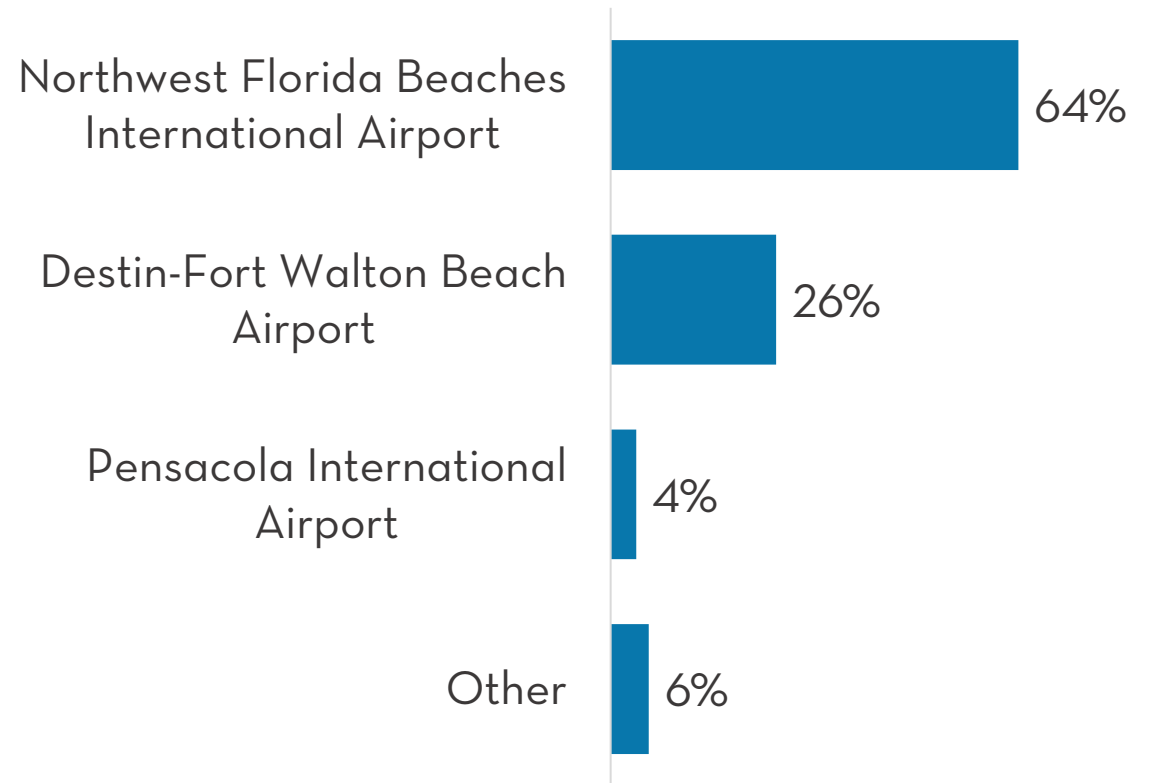


**76%** of Fall visitors drove to Walton County



**30%** (-3% points from 2022) of those who drove were aware that there were direct flights from their city to the Walton County area, and **18%** were not sure if there were direct flights available

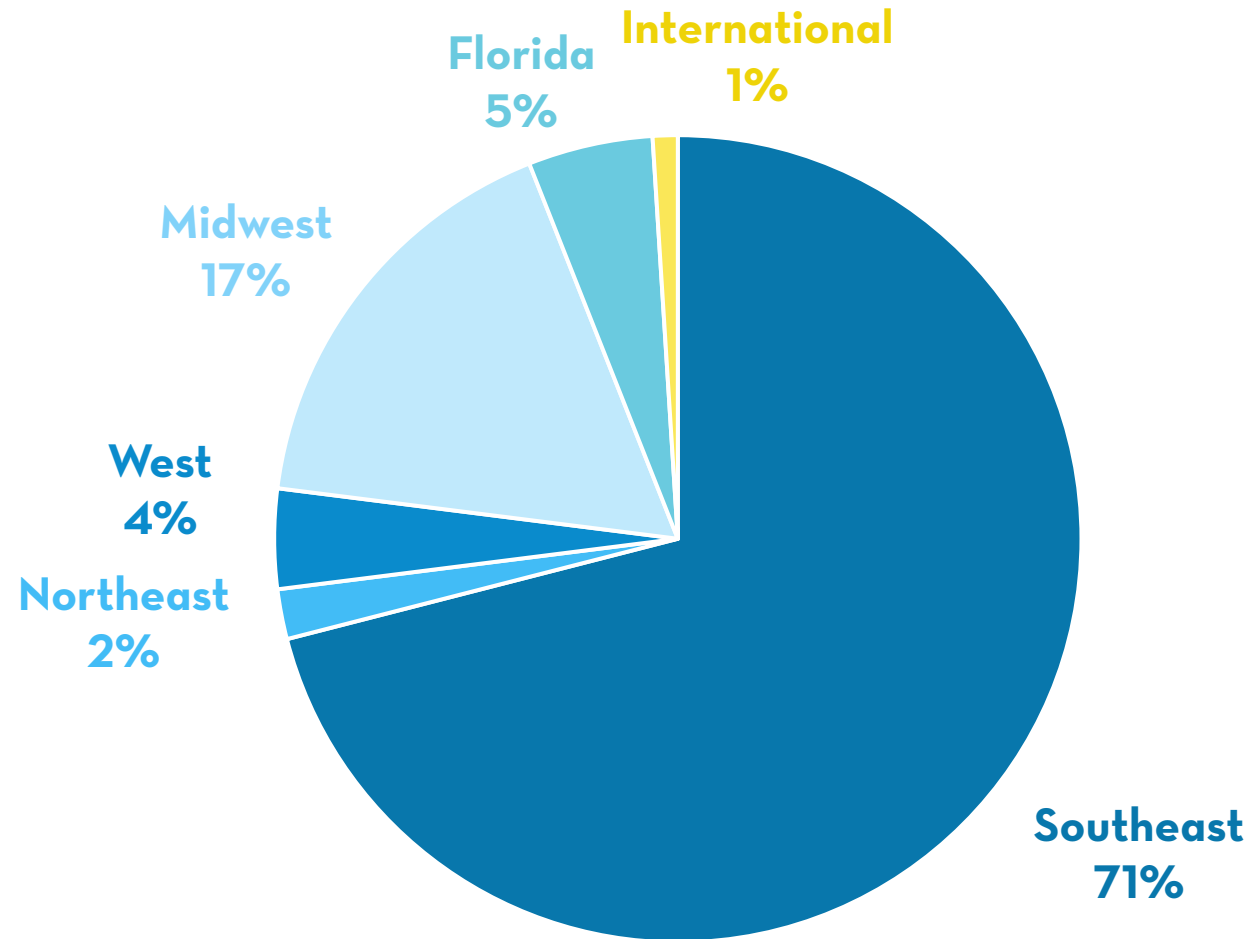
**24%** who **flew** used the following airports:



# VISITOR JOURNEY: TRAVEL PARTY PROFILE



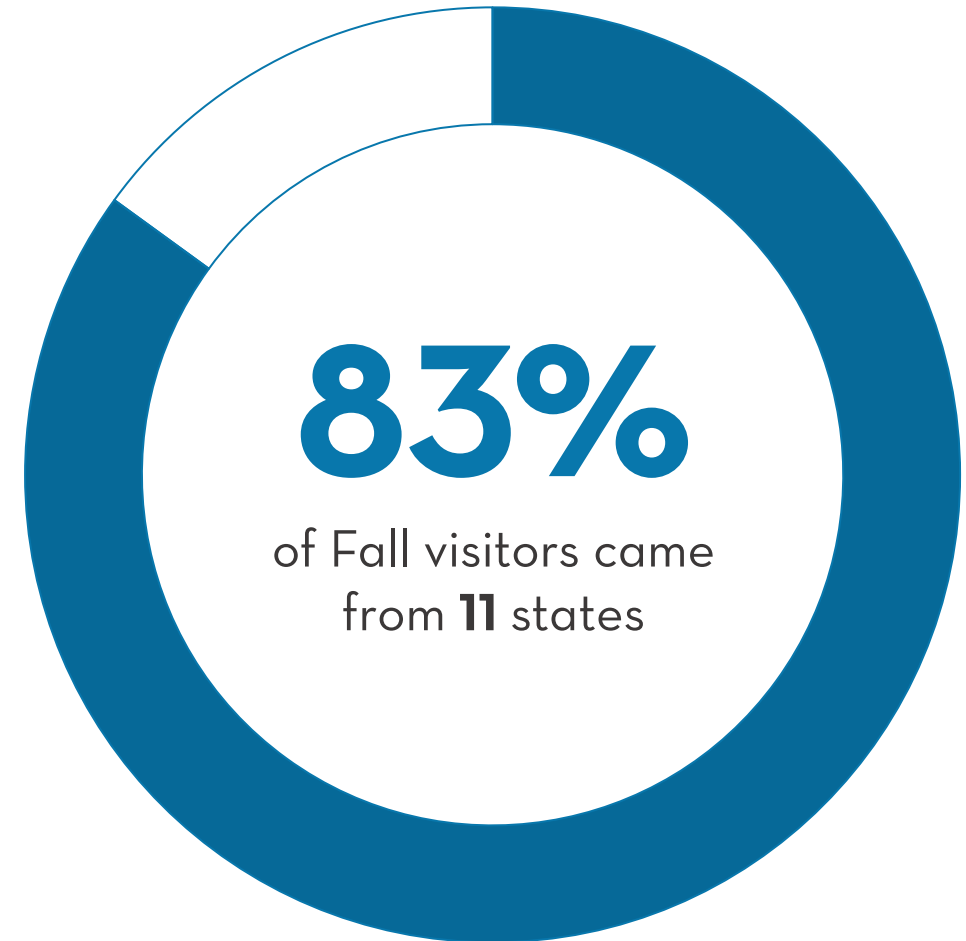
# ORIGIN OF FALL VISITORS






# ORIGIN OF FALL VISITORS

State	% of Visitors
Tennessee	16%
Georgia	15%
Alabama	11%
Texas	11%
Mississippi	6%
Florida	5%
Kentucky	5%
Louisiana	5%
Indiana	3%
Missouri	3%
Ohio	3%



# ORIGIN OF FALL VISITORS




**13%** (-2% points from 2022) of all visitors came from the **Atlanta** market




**Over 1 in 10** (+3% points from 2022) visitors are from the **Nashville** market

Top Origin Markets	% of Visitors
Atlanta	13%
Nashville	11%
Dallas-Fort Worth	5%
Memphis	5%
Birmingham	4%
Houston	4%
Mobile-Pensacola	3%
Columbus, OH	3%
New Orleans	3%
Saint Louis	2%
Montgomery	2%
Baton Rouge	2%
Indianapolis	2%

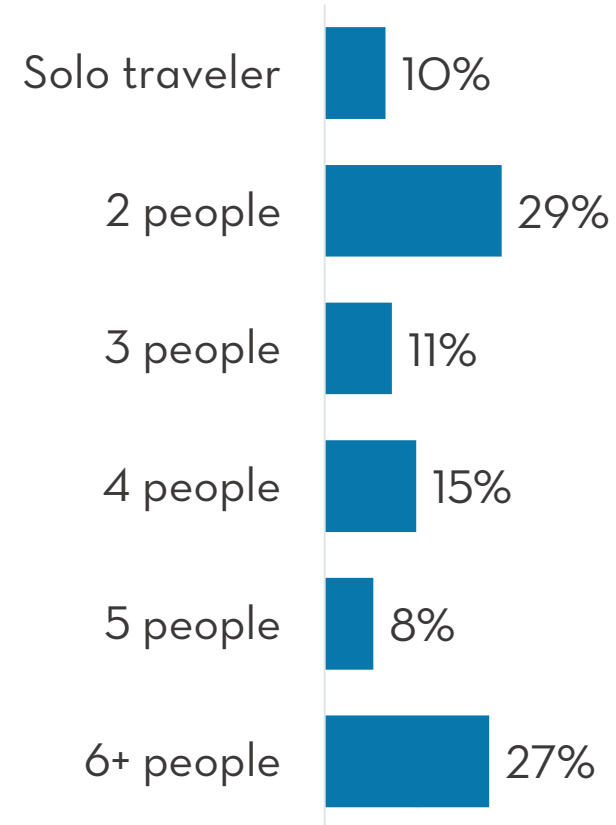
# TRAVEL PARTY SIZE AND COMPOSITION



Visitors traveled in a party composed of **4.2** people



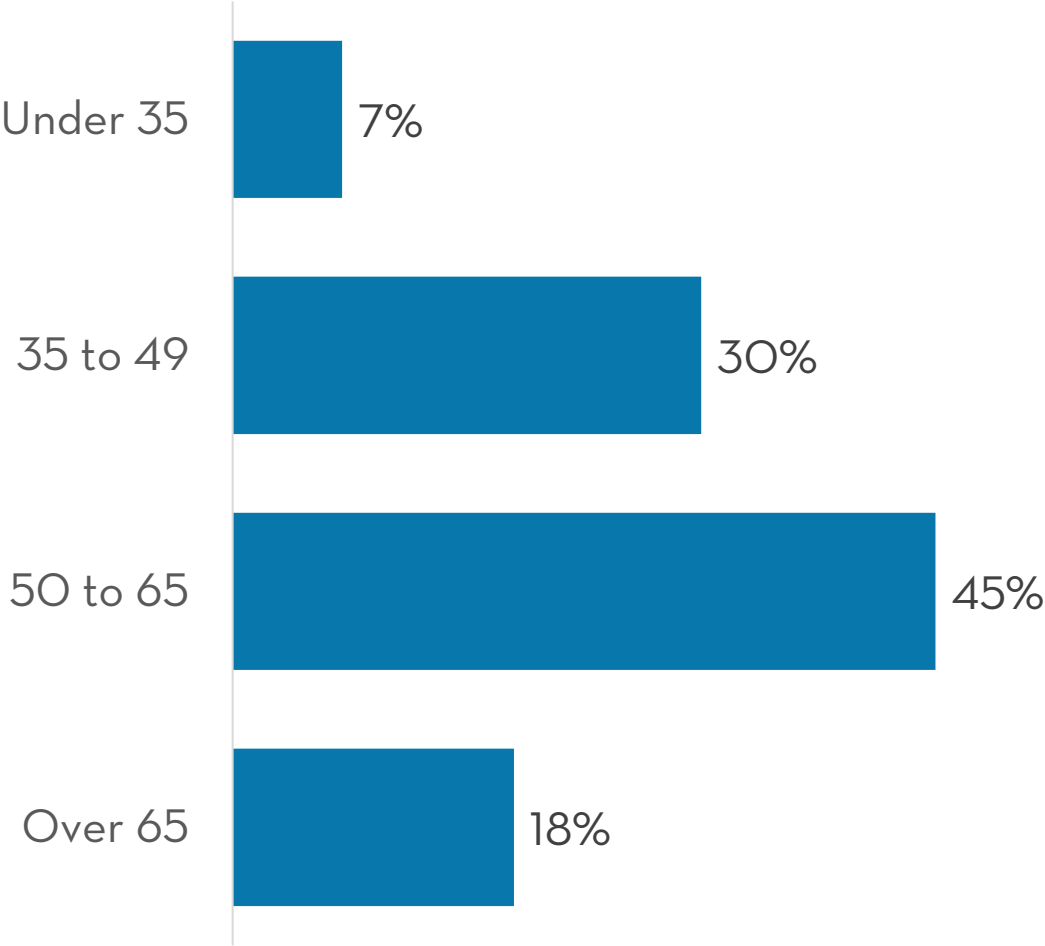
**41%** of visitors traveled with children under the age of 20



# AGE OF FALL VISITORS



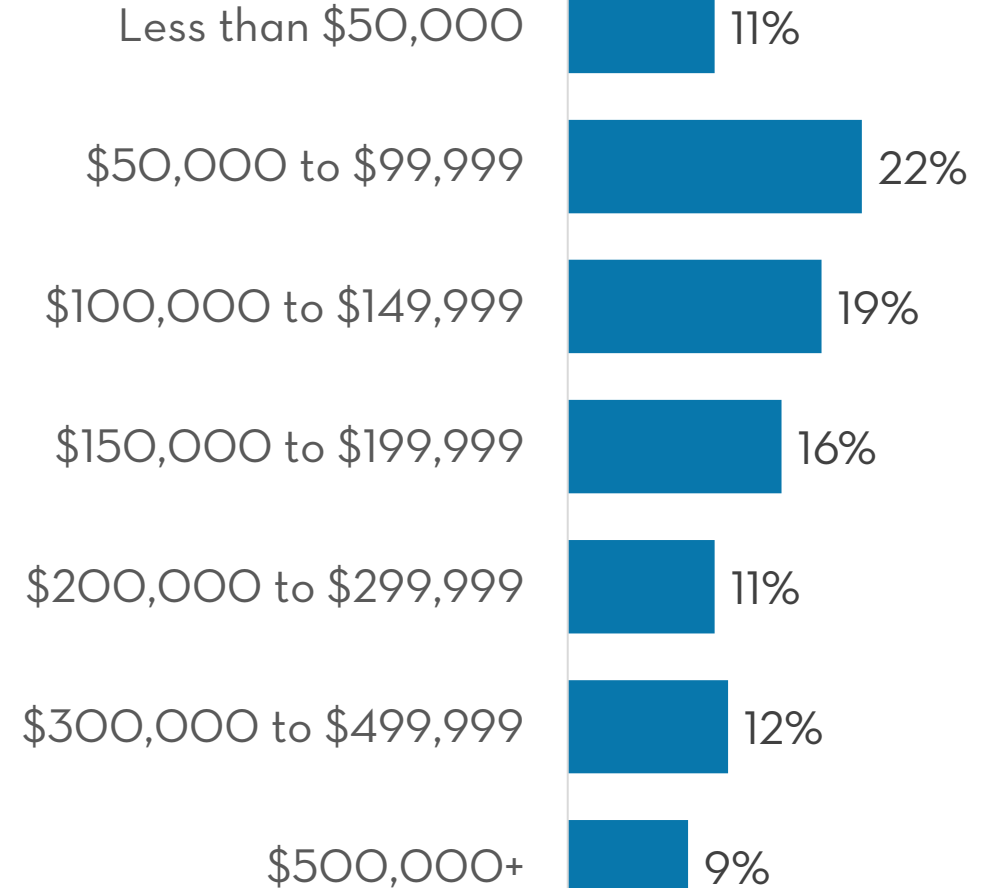
Median age of Fall visitors was **54 years old**



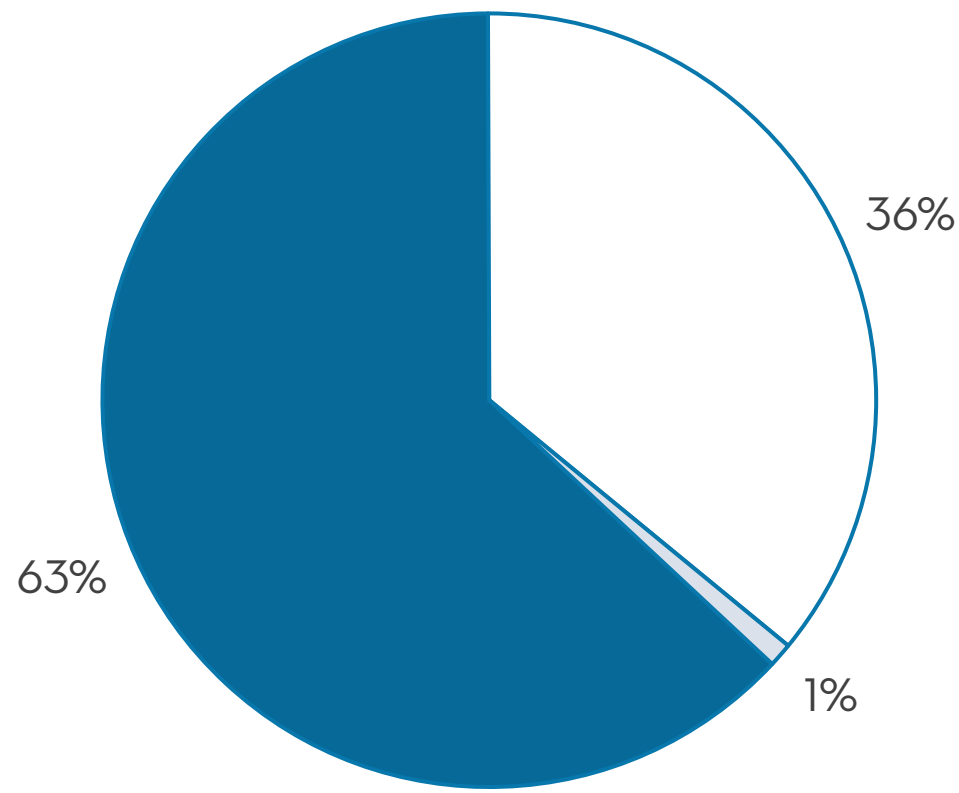


# TOTAL HOUSEHOLD INCOME IN 2022

Fall visitors had a **median** household income of **\$144,700**, while estimated **average** household income was **\$194,300**



# GENDER



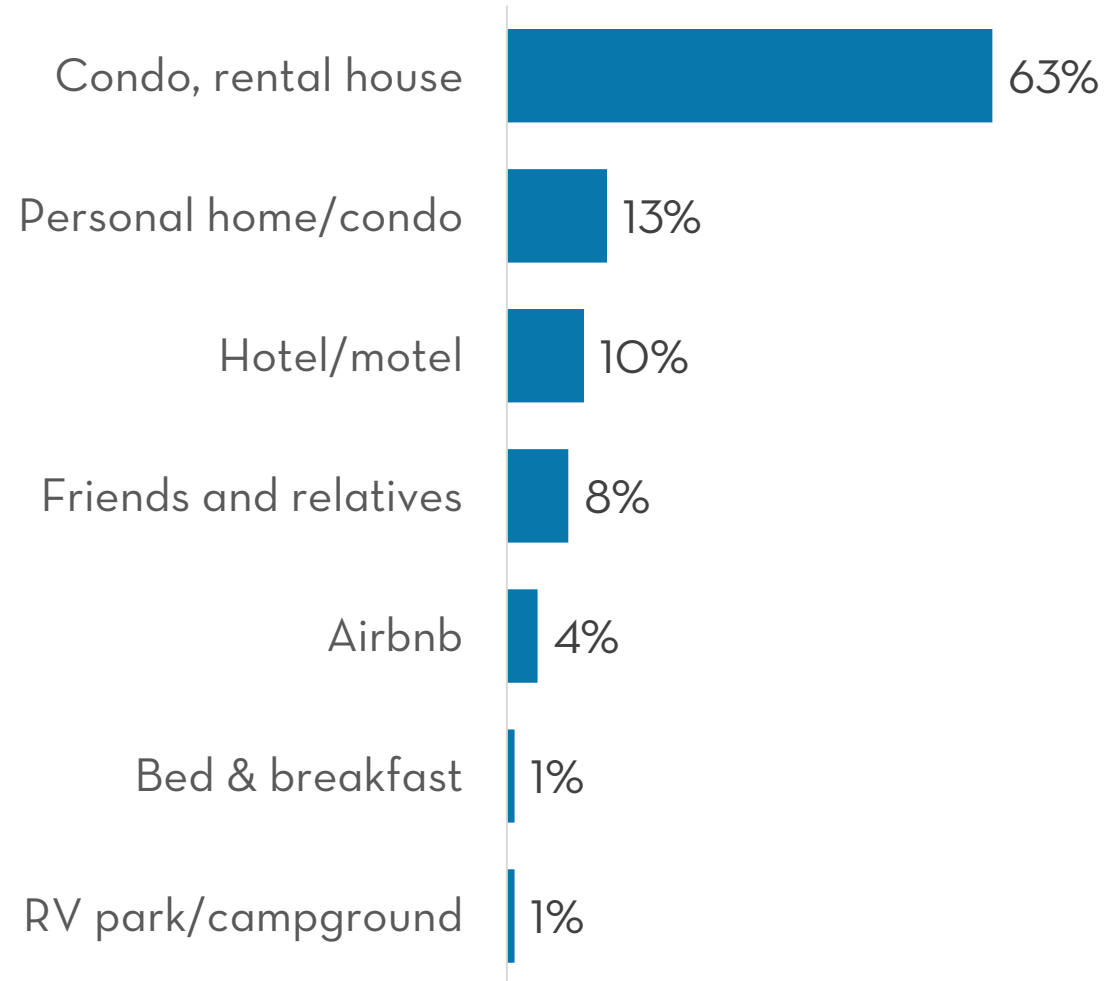
■ Female    □ Male    ■ Prefer not to answer

Responses impacted by person more willing to be interviewed

# VISITOR JOURNEY: TRIP EXPERIENCE



# VISITOR'S ACCOMMODATIONS

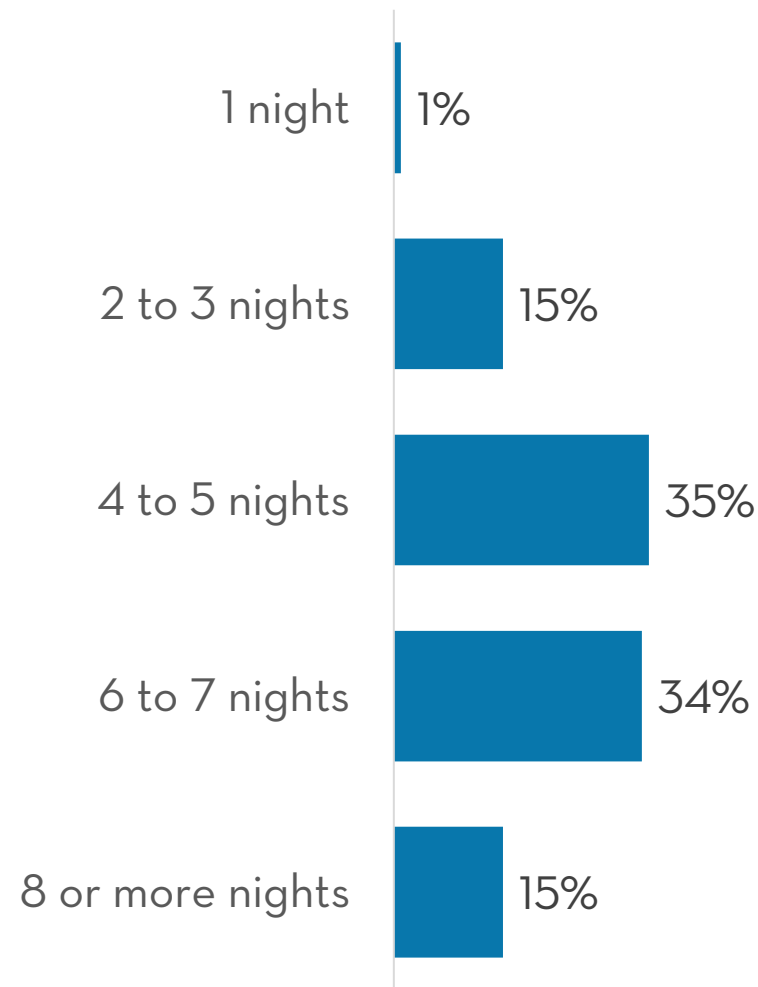




# LENGTH OF STAY

Fall visitors<sup>1</sup> spent an average of **5.8** nights<sup>2</sup> in Walton County

Fall visitors staying in paid accommodations spent an average of **6.1** nights<sup>2</sup> in Walton County



<sup>1</sup>Includes visitors staying paid accommodations, non-paid, and day trippers.

<sup>2</sup>Visitors who stayed in Walton County up to 30 nights.

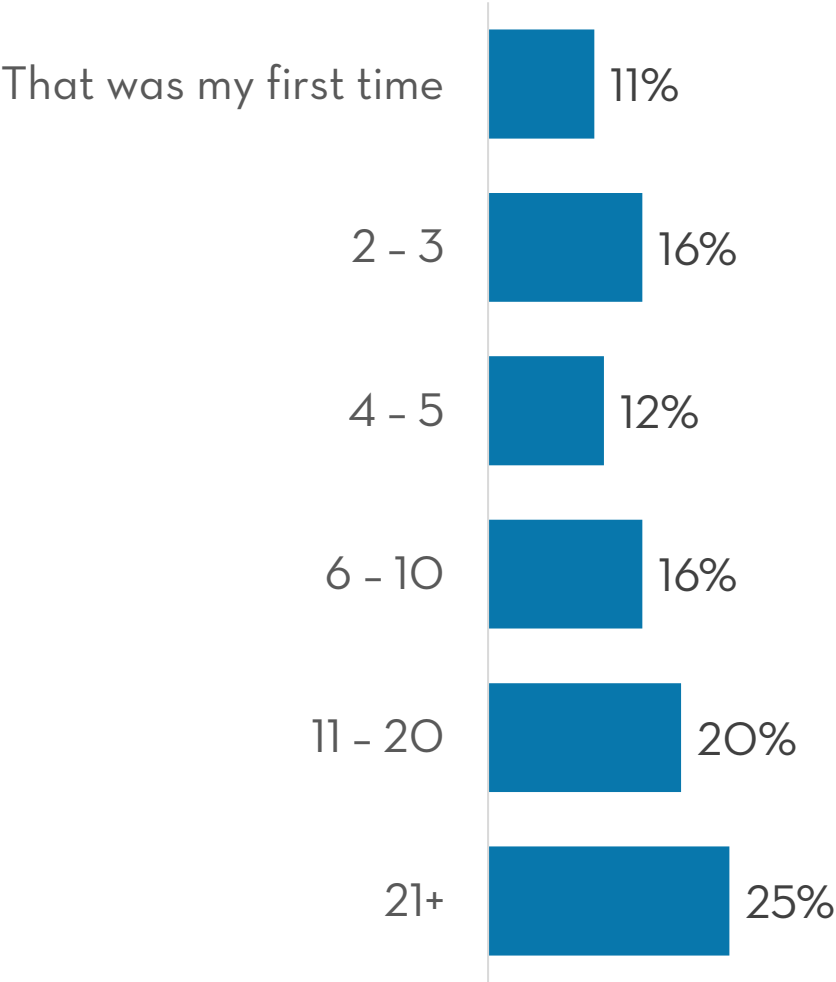
# NUMBER OF VISITS TO WALTON COUNTY



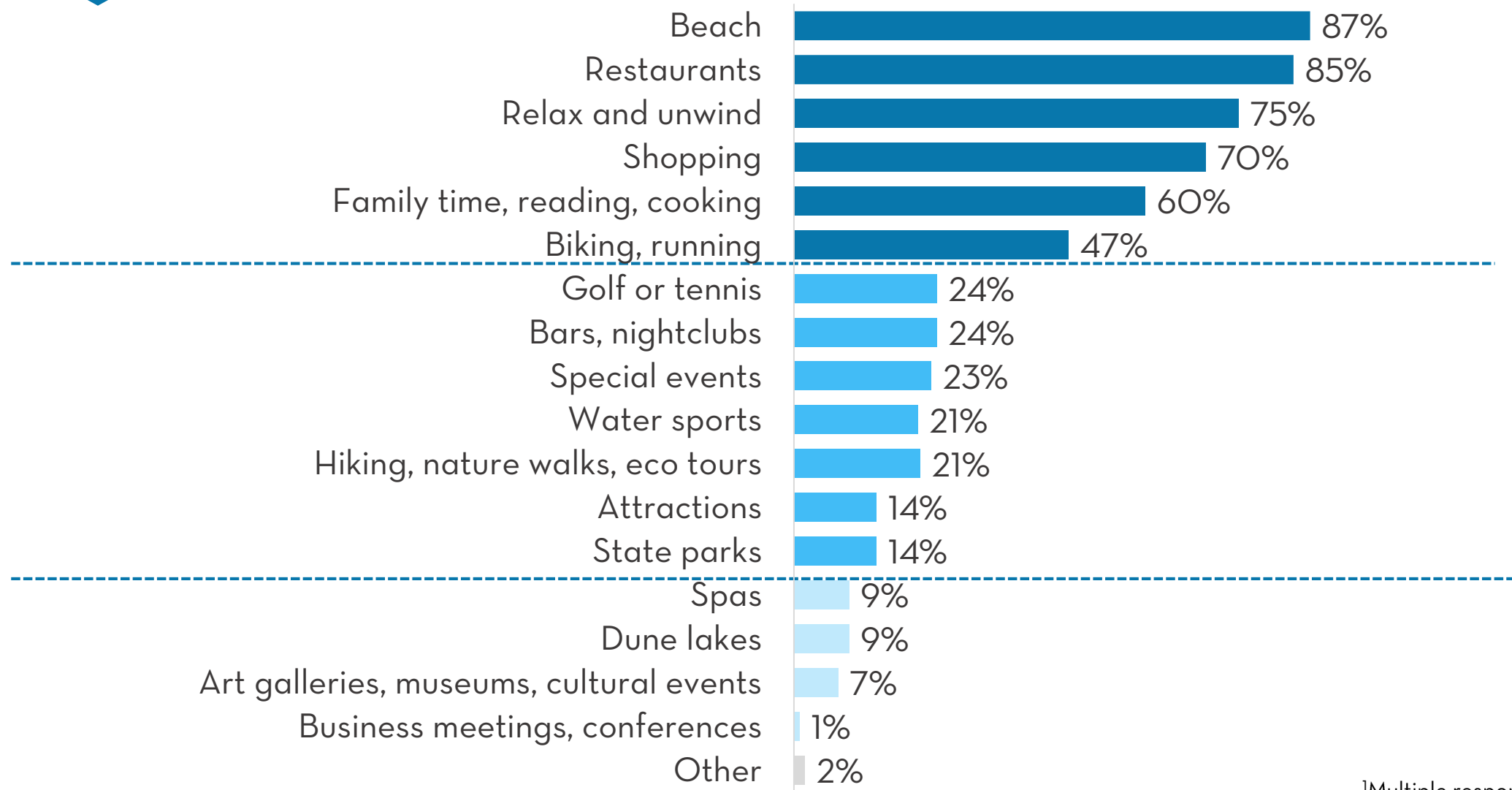
**11%** of Fall visitors were visiting for the first time



**45%** of Fall visitors have visited Walton County more than 10 times



# VISITOR ACTIVITIES<sup>1</sup>

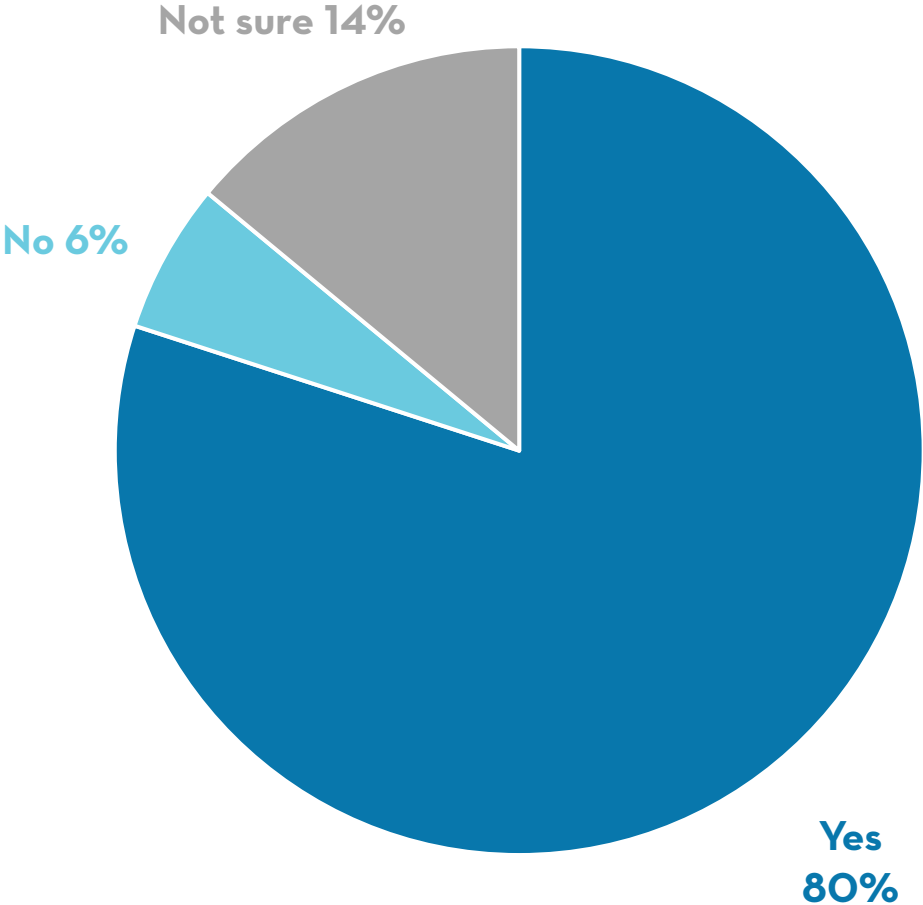


<sup>1</sup>Multiple responses permitted.

# BEACH SAFETY



**80%** of Fall visitors know there are flags posted along the beaches to indicate how safe it is to go into the water

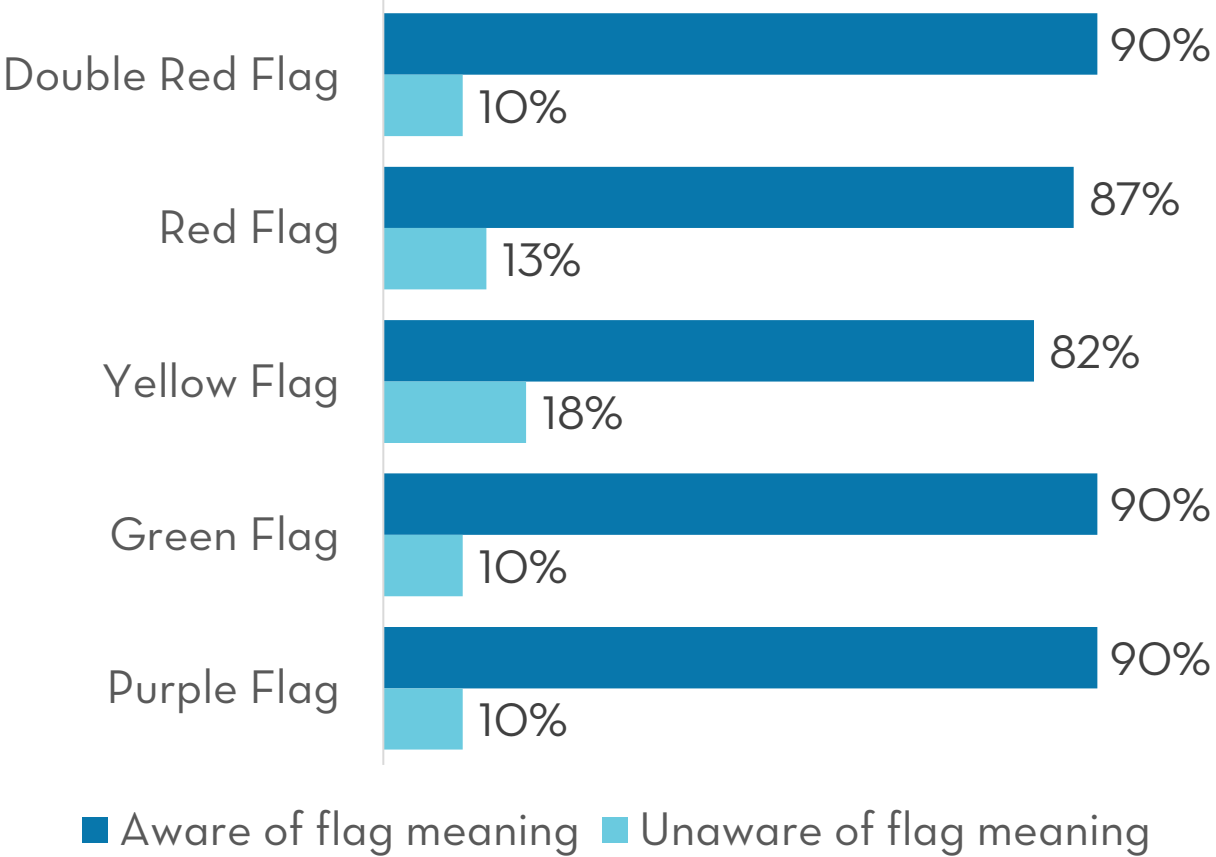




# BEACH FLAG AWARENESS

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

**61%** (+7% points from 2022) of Fall 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 EXPENSES<sup>1</sup>

Visitor Metrics <sup>1</sup>	Average Daily Expenditure	Total Trip Expenditure
Accommodations	\$274	\$1,580
Restaurants	\$163	\$940
Groceries	\$68	\$390
Shopping	\$138	\$800
Entertainment	\$53	\$310
Transportation	\$58	\$330
Other	\$17	\$100
<b>Total</b>	<b>\$771</b>	<b>\$4,450</b>

<sup>1</sup>Includes overnight visitors and day trippers.

# VISITOR JOURNEY: POST-TRIP EVALUATION



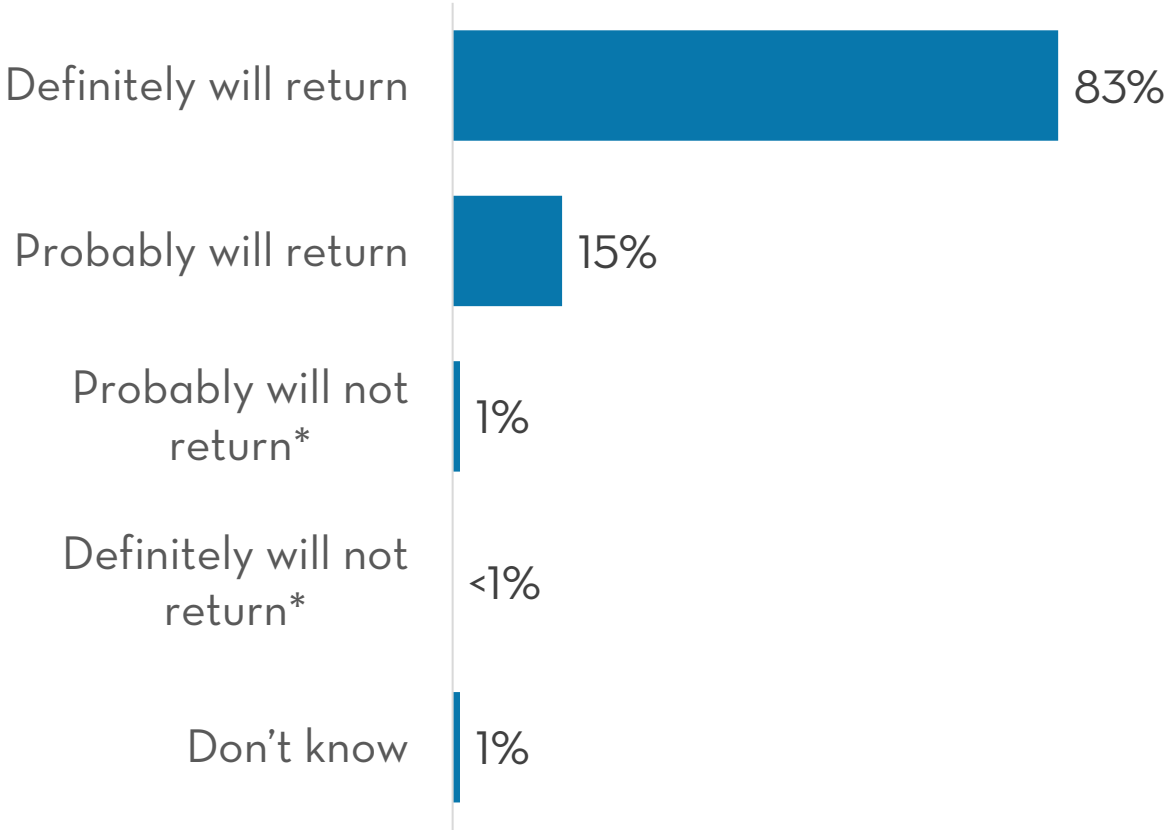
# SATISFACTION WITH WALTON COUNTY



Visitors gave Walton County a rating<sup>1</sup> of **9.4** as a place to vacation



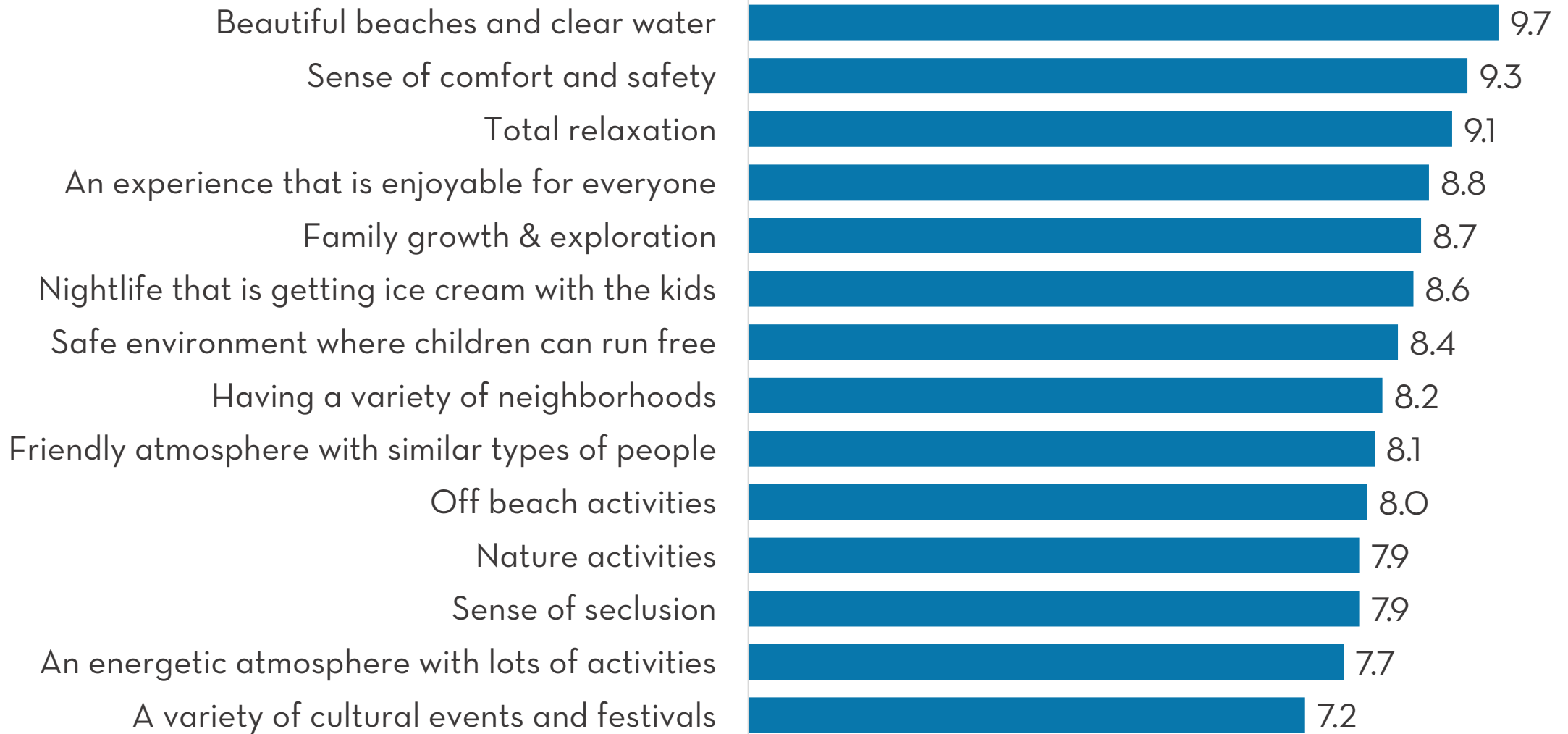
**Over 4 in 5** Fall visitors will definitely return to Walton County



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

\*2% of all visitors will not return to Walton County for the following reasons:  
1. Too crowded 2. Too expensive 3. Not enough to do at night

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



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



# AREA DESCRIPTIONS



*"Beautiful white sandy beaches with crystal blue waters, super safe for kids and family-oriented. So many excellent restaurants and shopping. Wine, Jazz ,and Art festivals and the farmer's markets are all excellent."*

*"Most beautiful beaches in the country. Perfect water and weather, especially in the spring and fall."*

*"Absolutely beautiful beaches, less crowed than most beach environments, serene and relaxing."*

*"Safe environment, beautiful uncrowded beaches."*

*"Beautiful secluded beaches in many upscale developments. There are many things for families to do."*

*"A vey special place, one of the best beaches in the US."*

# AREA DESCRIPTIONS



*"Great place for family vacation. Lots of activities for those who don't like to sit by the water all day. Bikes and golf are a must!"*

*"Safe family place where the kids can run free without worry. Nice early evening curfew to eliminate trouble at night. Amazing place!"*

*"Great for family vacation! Safe, clean, and wonderful accommodations."  
"Beautiful beaches, friendly people, great restaurants."*

*"Fabulous place for a family vacation."*

*"Small communities with some of the world's most beautiful beaches and luxurious homes. Safe and friendly - plenty to do with the family."*

*"Beautiful beaches and a good choice of restaurants. It's a family tradition."*

# AREA DESCRIPTIONS



*"Beautiful beaches and Gulf. Lots of restaurants that are good and near 30A. Lots of fishing, history, golf, and activities available if you want that."*

*"Gorgeous architecture. Feels like you've traveled abroad. Safe for the young adults to hang out and bike around."*

*"Most beautiful beaches, lovely towns and architecture, lots of restaurants and activities"*

*"Lots of good restaurants, beautiful beaches, bike paths, great weather in October."*

*"Beautiful beaches, great towns and good restaurants"*

*"Upscale, safe place, with beautiful beaches"*

*"Magical but crowded."*



# FEELINGS ASSOCIATED WITH WALTON COUNTY



*"It's our home away from home."*

*"Overall feelings get from being at the beach are restful, peaceful, and meditation."*

*"Calm ,romantic, peaceful, beautiful."*

*"We get much needed family time together. We look forward to it every year."*

*"Escape from reality."*

*"We love coming over for a few days to get out of our normal routine."*

*"Happy and Blessed."*

# WALTON COUNTY TOURISM

## **Fall 2023 Visitor Tracking Study** September 2023 – November 2023

Downs & St. Germain Research  
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