

WALTON COUNTY TOURISM

Fall 2025 Visitor Tracking Study
September - November 2025



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Visitor Tracking Study

This report is based on 463 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 and November 2025.

ECONOMIC IMPACT SUMMARY



TOURISM SNAPSHOT: KEY PERFORMANCE INDICATORS



767,900

TOTAL VISITORS

vs. 2024

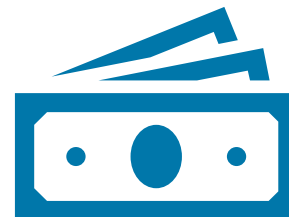
↓ **3.5%**



632,700

ROOM NIGHTS

↓ **5.6%**



\$645,681,300

DIRECT SPENDING

↓ **8.2%**



\$10,392,233

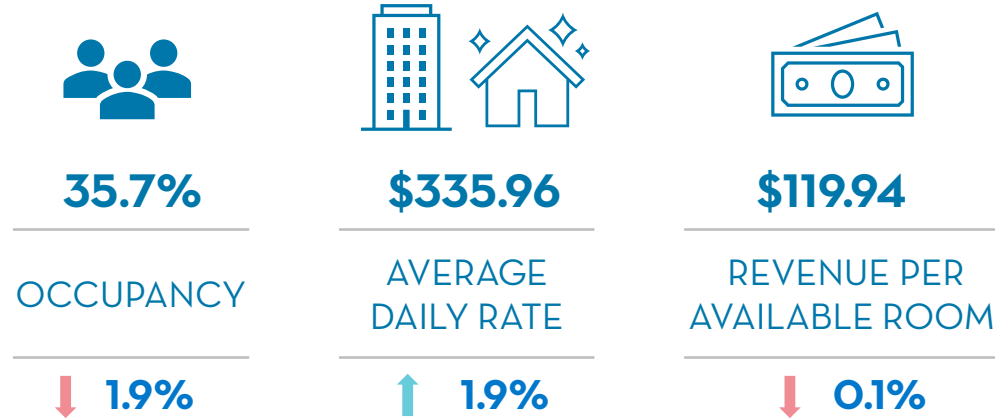
TOURISM DEVELOPMENT TAX

↑ **12.1%¹**

¹November 2024 TDT collection was affected by the transition to a new tax portal. The 68% increase in November TDT reflects the difficulty in collecting TDT during the transition.

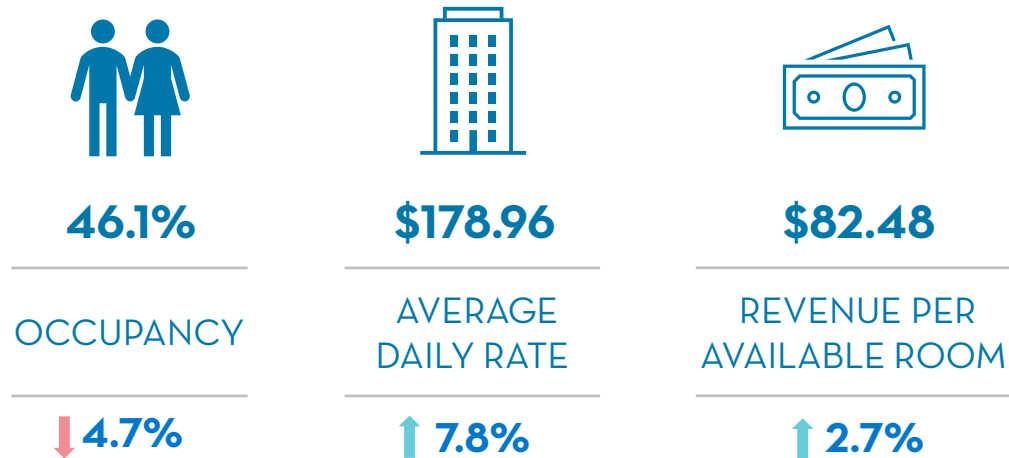
TOURISM SNAPSHOT: LODGING METRICS¹

COMBINED

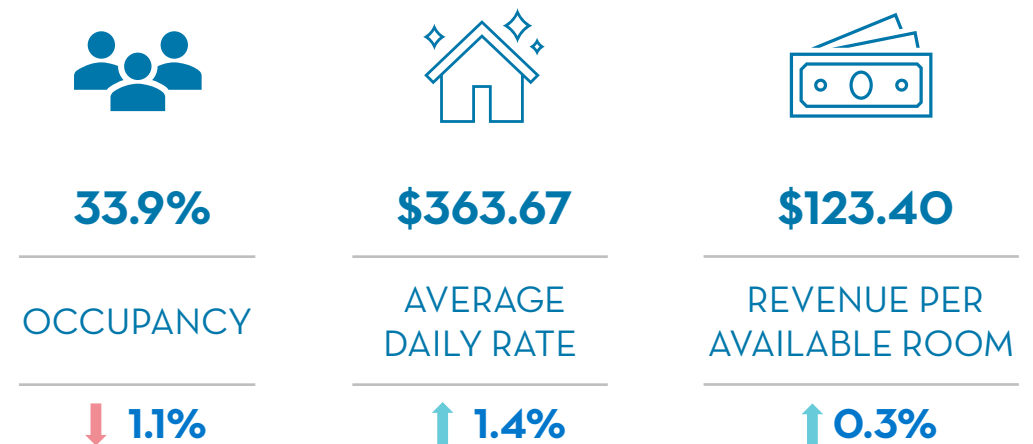


¹Airbnb (effective April 30, 2025) and Vrbo (effective May 30, 2025) have updated how rates are quoted through their platforms. The ADR now includes cleaning fees, platform service fees, and applicable discounts (e.g., weekly or monthly stay discounts). Therefore, the ADR of vacation rentals may appear 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 FALL SEASON

Insights:

- » Fall experiences the lowest volume of visitors to Walton County of any season except Winter.
- » Unlike Winter, Fall visitors tend to have shorter lengths of stay.
- » Although Fall visitors spend more per person per day than the typical Walton County visitor, they spend less per travel party per day due to having smaller-than-typical travel party sizes.

Recommendations:

- » Continue to build on increasing the length of stays of Fall guests by offering incentives to extend their trips.
- » Encourage families who visit in Spring and Summer to return during Fall for a quieter, more relaxed experience with similar weather and amenities but fewer crowds.

Visitor Metrics	Typical Fall Visitor ¹	Typical Visitor ¹
Daily spend per travel party	\$722	\$785
Daily spend per visitor	\$162	\$156
Length of stay	5.9	5.8
Travel party size	4.3	5.0

¹Typical Fall visitor is an average of Fall figures since Fall 2022. Typical visitor is an average of annual figures for 2022, 2023, and 2024.

VISITOR PROFILE SUMMARY



FALL 2025 VISITOR PROFILE



54

Median Age

13%

First-time Visitor

\$129,200

Median Household Income

43%

Traveled with Children
under the age of 20

4.1

Travel Party Size

6.1

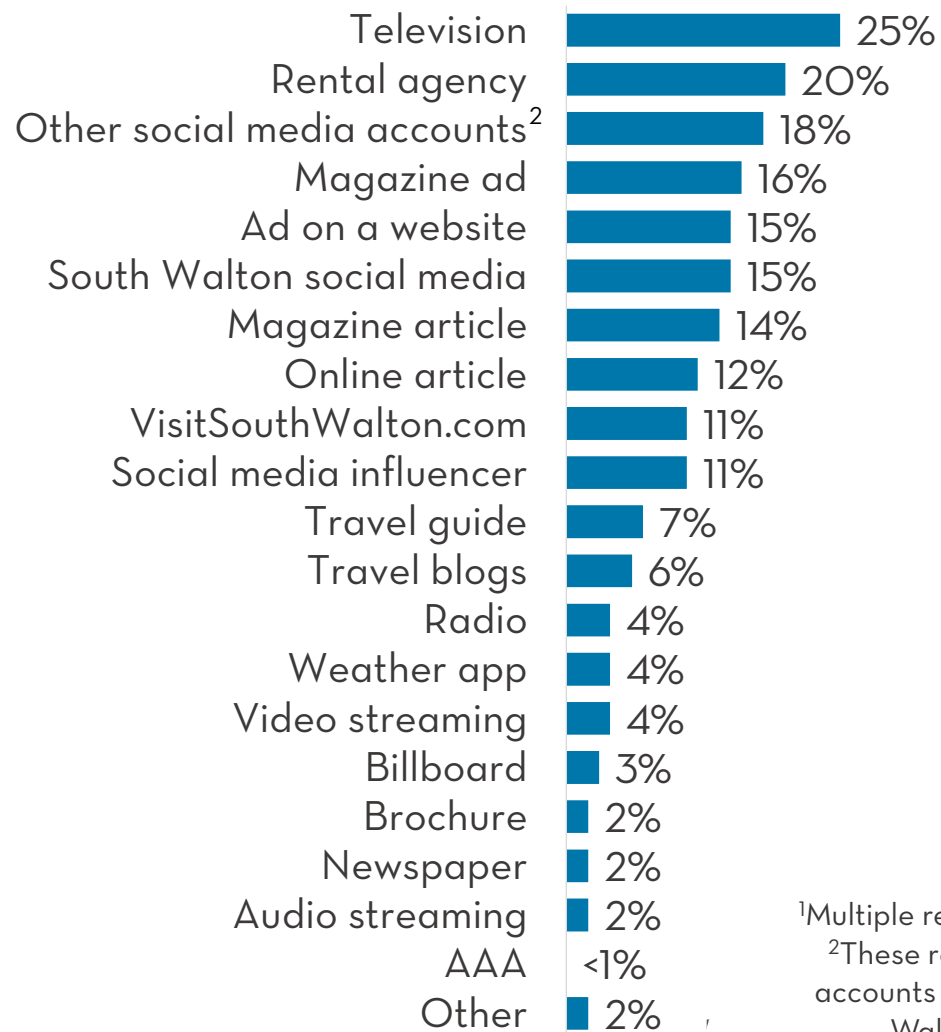
Length of Stay

WALTON COUNTY PROMOTIONS¹

Insights:

- » Over 1 in 4 Fall visitors recalled seeing promotions for Walton County before their trip- an increase of 1% point compared to Fall 2024.
- » The percentage of visitors who were influenced by ads and promotions increased 2% points year-over-year.
- » These increases indicate that increased efforts to market for the shoulder seasons is having an impact on visitors.

Base: **26%** of visitors who recall advertising



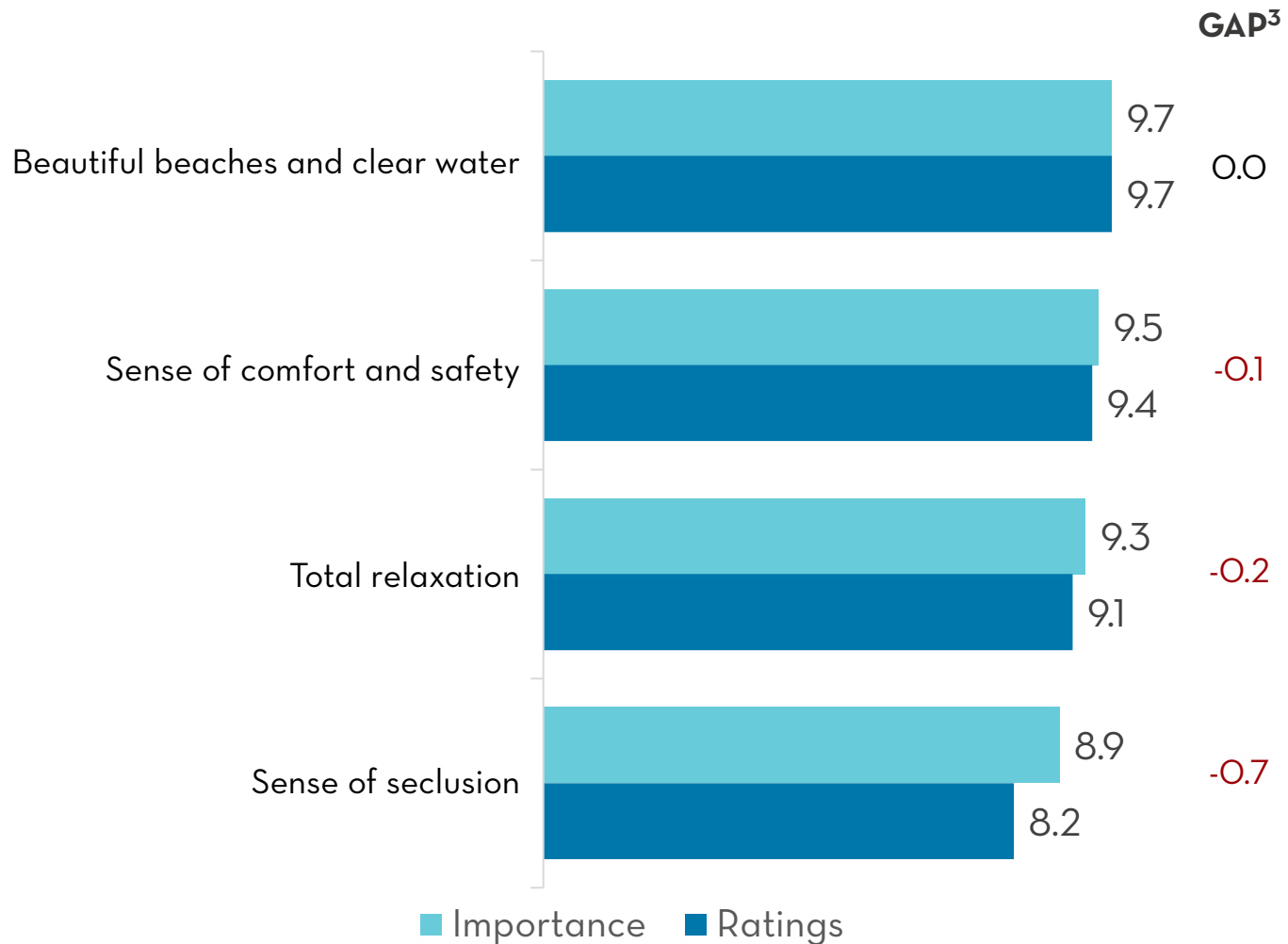
¹Multiple responses permitted.

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.



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 9.7. Visitors rated WC as 9.7 on its beaches. Hence, the GAP is 0.0.

ORIGIN OF FALL VISITORS

Insights:

- » 7 in 10 Fall visitors to Walton County are from the Southeast, not including Florida.
- » Over half of Fall visitors are from Georgia, Tennessee, Alabama, Texas or Mississippi.
- » Over 1 in 3 Fall visitors are from the Atlanta, Nashville, Mobile-Pensacola, Columbus-Tupelo-West Point, Memphis, or Birmingham markets.

REGION		STATE		MARKET	
Southeast	69.7%	Georgia	15.2%	Atlanta	14.0%
Midwest	15.0%	Tennessee	13.7%	Nashville	8.0%
West	7.5%	Alabama	11.9%	Mobile-Pensacola	4.3%
Florida	4.5%	Mississippi	9.6%	Columbus-Tupelo-West Point	3.8%
Northeast	1.7%	Texas	8.0%	Memphis	3.5%
International	1.6%	Florida	4.5%	Birmingham	3.4%

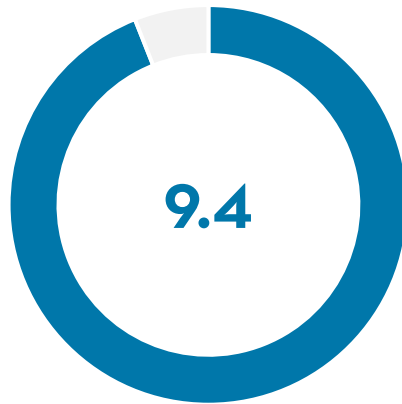
ACCOMMODATION SPENDING

Insights:

- » Accommodation spending per travel party per trip for Fall 2025 increased 4.6% year-over-year due to an increase in ADR and length of stay.
- » Total accommodation spending for Walton County decreased 4.6% from Fall 2024.
- » While the typical travel party paid more for their stay, fewer travel parties visited, resulting in a decrease in total lodging revenue.

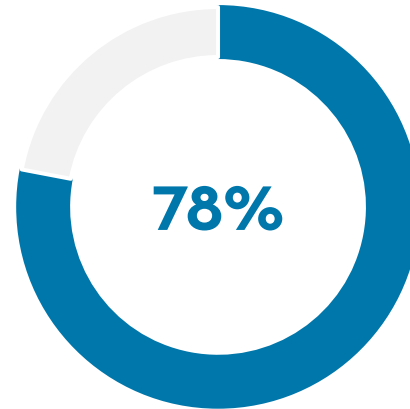
Visitor Metrics	Fall 2024	Fall 2025	% Δ
Accommodation spending per travel party	\$1,520	\$1,590	+4.6%
Total accommodation spending	\$267,298,900	\$255,069,600	-4.6%

SATISFACTION STATISTICS



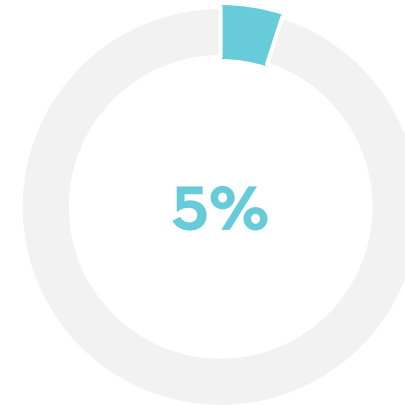
Highly Rated

Visitors gave Walton County a rating of 9.4 out of 10 (consistent with 2024) as a place to vacation



DEFINITELY RETURN

78% of visitors said they would definitely return to Walton County



UNCERTAIN ABOUT RETURNING¹

5% of visitors were uncertain of whether they would return or not

¹5% of visitors who are uncertain about returning to Walton County for the following reasons:
1. Too expensive 2. Limited shopping and entertainment 3. 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

"It feels like belonging to a hidden coastal community rather than just visiting a beach."



"I love coming to the beach for business! It makes me feel like I have a mini vacation."

"We come down every year for a girl's trip because we love the cool air and the small crowds this time of the year."



YEARLY COMPARISONS



VISITOR PROFILE – FALL 2024 VS. 2025

Visitor Metrics	Fall 2024	Fall 2025
Travel party	4.1	4.1
Kids <20	43%	43%
Median age	54	54
Estimated median household income	\$130,000	\$129,200
Drove	75%	76%
Nights stayed¹	5.9	6.1
Direct expenditures (travel party for entire trip)	\$3,790	\$3,720
1st time visitor	11%	13%
Over 10 visits to Walton County	41%	35%

¹Visitors staying 30 days or fewer.

VISITOR PROFILE - FALL 2024 VS. 2025

Top Origin States	Fall 2024	Fall 2025
Georgia	14.1%	15.2%
Tennessee	14.7%	13.7%
Alabama	11.7%	11.9%
Mississippi	7.8%	9.6%
Texas	11.1%	8.0%

Origins - Regions	Fall 2024	Fall 2025
Southeast	69.4%	69.7%
Midwest	17.7%	15.0%
West	4.8%	7.5%
Florida	4.5%	4.5%
Northeast	2.1%	1.7%
International	1.5%	1.6%

VISITOR PROFILE – FALL 2024 VS. 2025

Top Visitor Activities	Fall 2024	Fall 2025
Beach	87%	87%
Restaurants	83%	85%
Relax and unwind	77%	80%
Shopping	70%	73%
Family time, reading, cooking	61%	58%
Biking, running	47%	51%
Water sports	23%	35%
Bars, nightclubs	23%	26%
Special events	20%	26%
Golf or tennis	26%	23%
Attractions	15%	21%
Hiking, nature walks, eco tours	18%	19%
State parks	13%	15%
Spas	13%	9%
Art galleries, museums, cultural events	8%	7%
Dune lakes	7%	7%
Business meetings, conferences	1%	2%
Other	1%	1%

VISITOR PROFILE – FALL 2024 VS. 2025

Visitor Metrics	Fall 2024	Fall 2025
Will return to Walton County¹	98%	95%
Rating for overall experience²	9.4	9.4
Viewed Visitors Guide³	24%	27%
Planned trip 6+ months out	20%	17%
Used VisitSouthWalton.com	12%	11%
Used 1 of 16 beaches' websites	15%	16%
Use the term "South Walton"	12%	14%

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 – FALL 2025 VS. 2024

- » With over 767 thousand visitors this Fall, total visitor spending was over \$645 million.
- » A decrease in occupancy and an increase in ADR led to a slight decrease in RevPAR.
- » The total number of visitors decreased due to a decrease in occupancy, a decrease in units available, and an increase in length of stay.
- » Direct spending was down year-over-year due to a decrease in the numbers of visitors.

Visitor Metrics	Fall 2024	Fall 2025	% Δ
Room nights	669,900	632,700	-5.6%
Total visitors	795,900	767,900	-3.5%
TDT collections	\$9,266,798 ¹	\$10,392,233	+12.1% ¹
Direct spending	\$703,306,600	\$645,681,300	-8.2%
Occupancy	36.4%	35.7%	-1.9%
Average Daily Rate	\$329.77	\$335.96	1.9%
RevPAR	\$120.04	\$119.94	-0.1%

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.

¹ November 2024 TDT collection was affected by the transition to a new tax portal. The 68% increase in November TDT reflects the difficulty in collecting TDT during the transition.

LODGING METRICS¹

35.7%

Occupancy

↓ 1.9%

\$335.96

ADR

↑ 1.9%

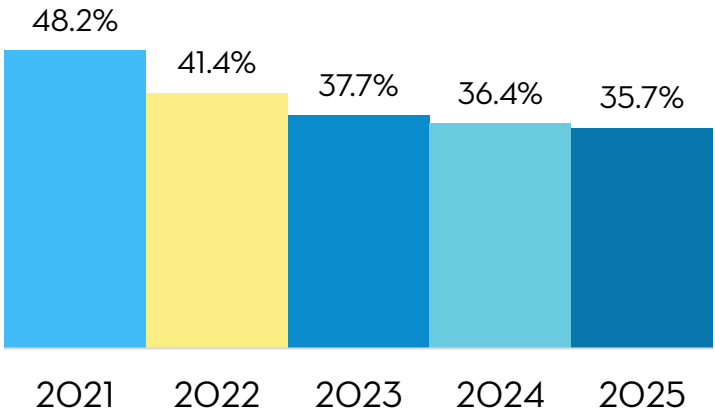
\$119.94

RevPAR

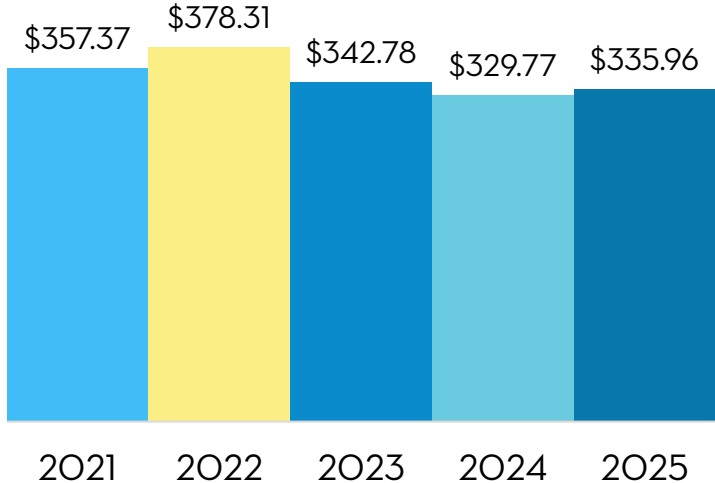
↓ 0.1%

5-YEAR OVERVIEW – FALL LODGING METRICS

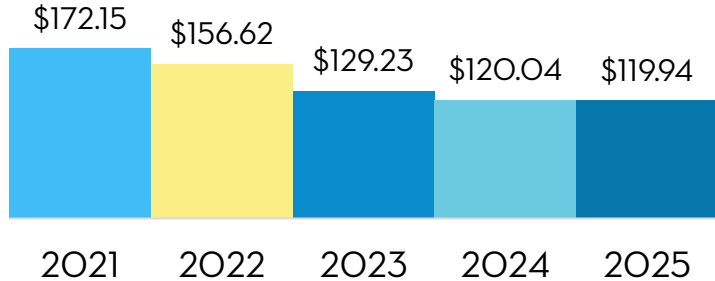
Occupancy Rate



Average Daily Rate

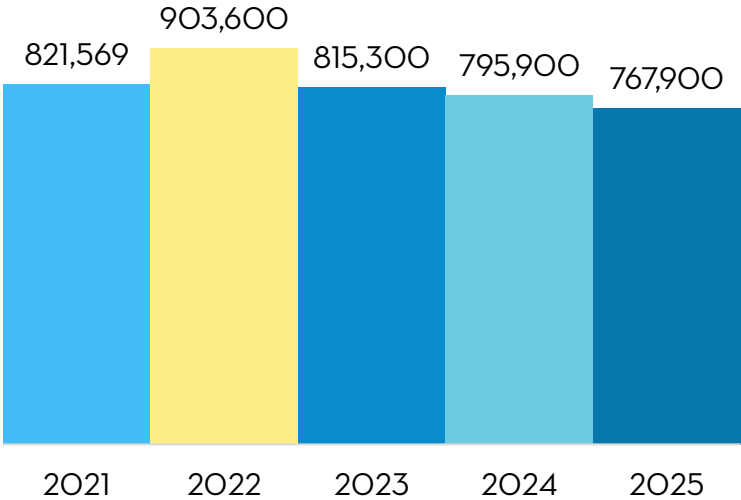


Revenue per Available Room

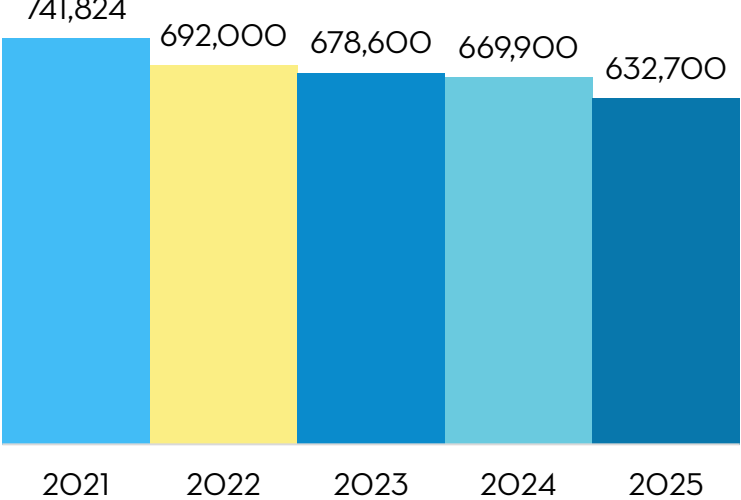


5-YEAR OVERVIEW – FALL TOURISM METRICS

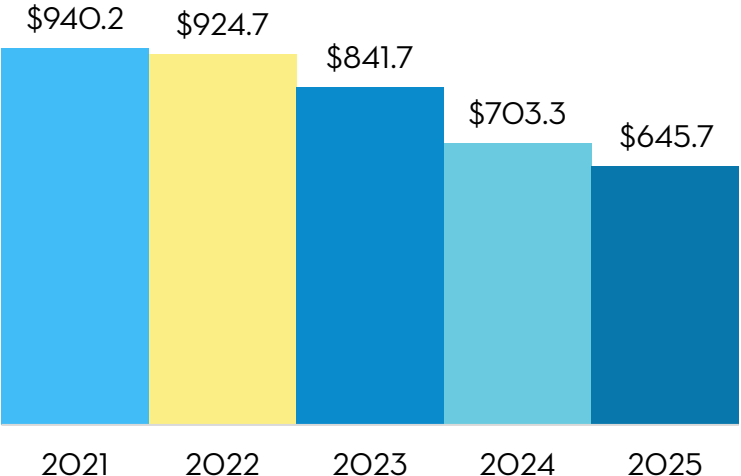
Visitors



Room Nights



Direct Spending (millions)



VISITOR JOURNEY: PRE-VISIT



PLANNING CYCLE



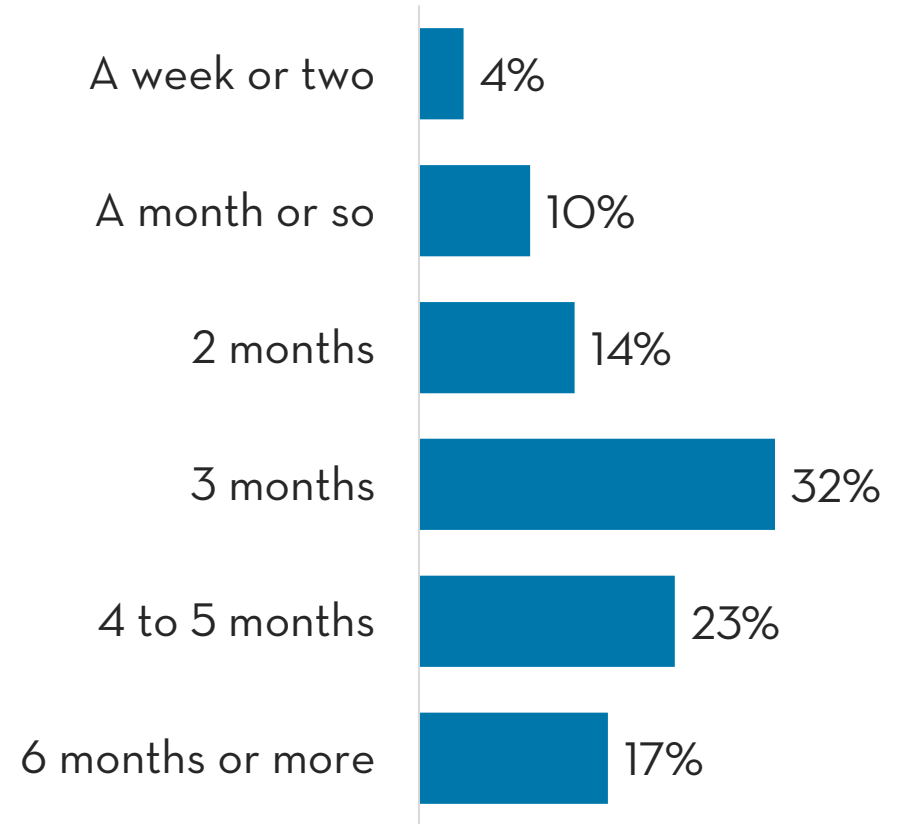
Over 7 in 10 visitors plan a Walton County Fall vacation at least **3 months** in advance



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



Typical trip planning cycle begins **99 days** before the trip (**100 days** in 2024)



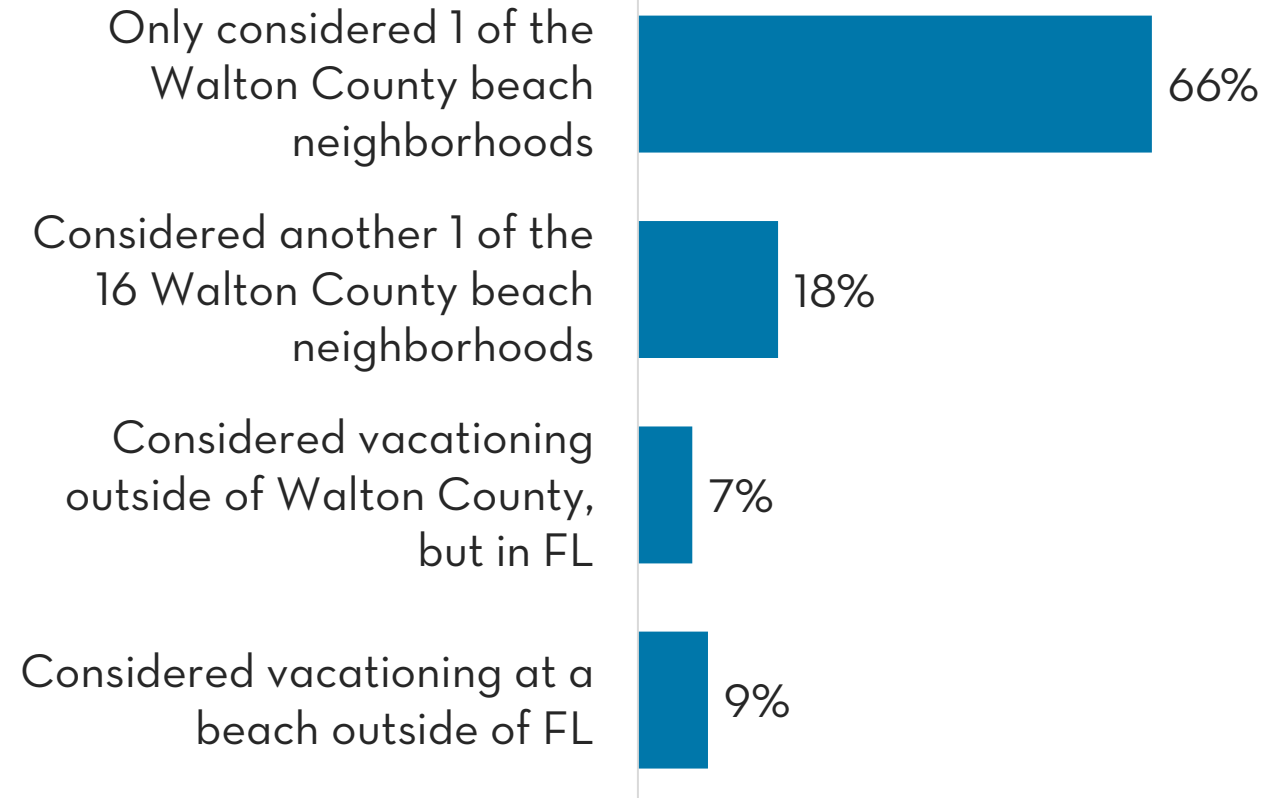
OTHER DESTINATIONS CONSIDERED



Nearly 2 in 3 (consistent with 2024) Fall visitors only consider going to the Walton County beach neighborhood where they stay



Nearly 1 in 7 use the term “South Walton” when referring to the area

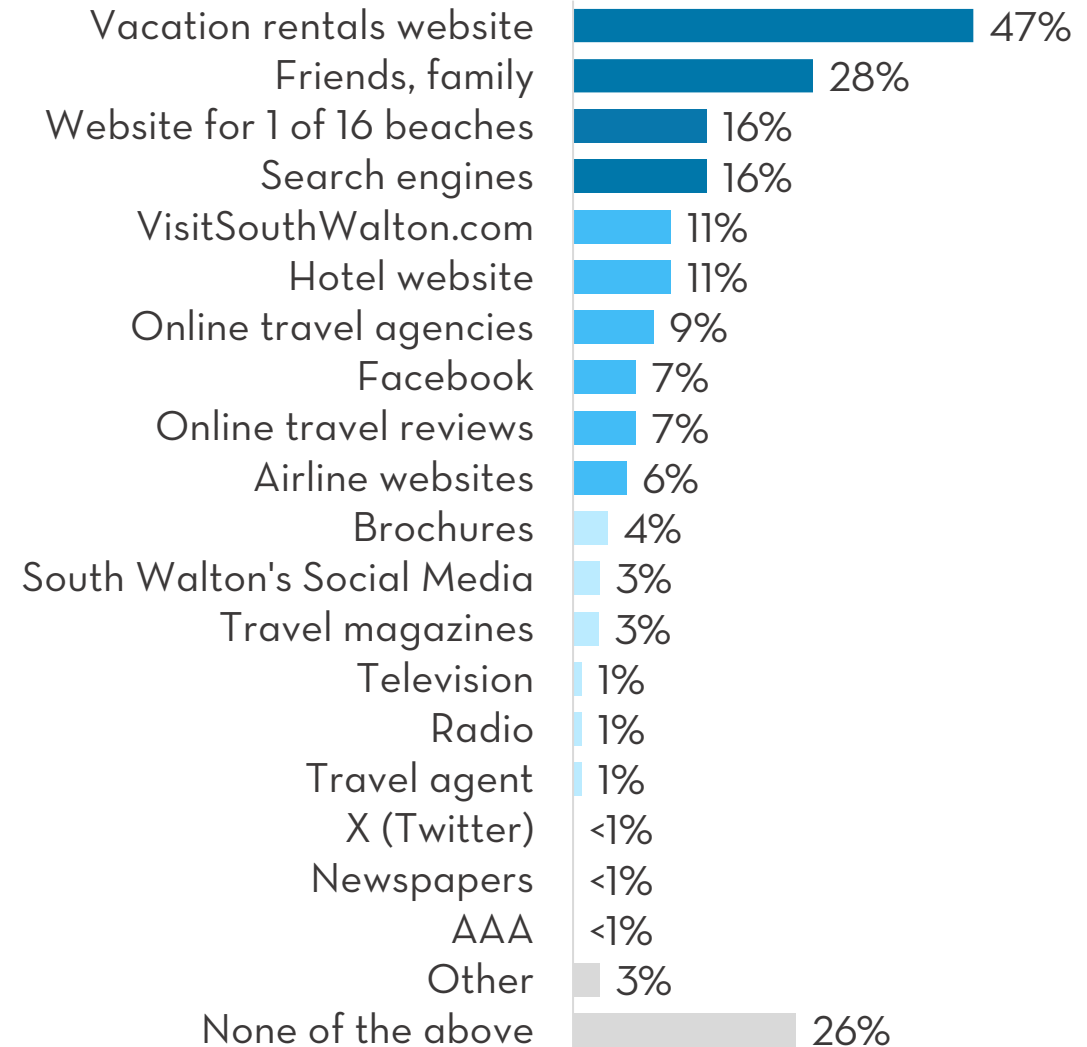


TRIP PLANNING SOURCES¹

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

Nearly 3 in 10 visitors ask their friends and family for advice to help plan their trip to Walton County

Nearly 1 in 6 visitors use the website for 1 of 16 beaches or a search engine to help plan their trip to Walton County

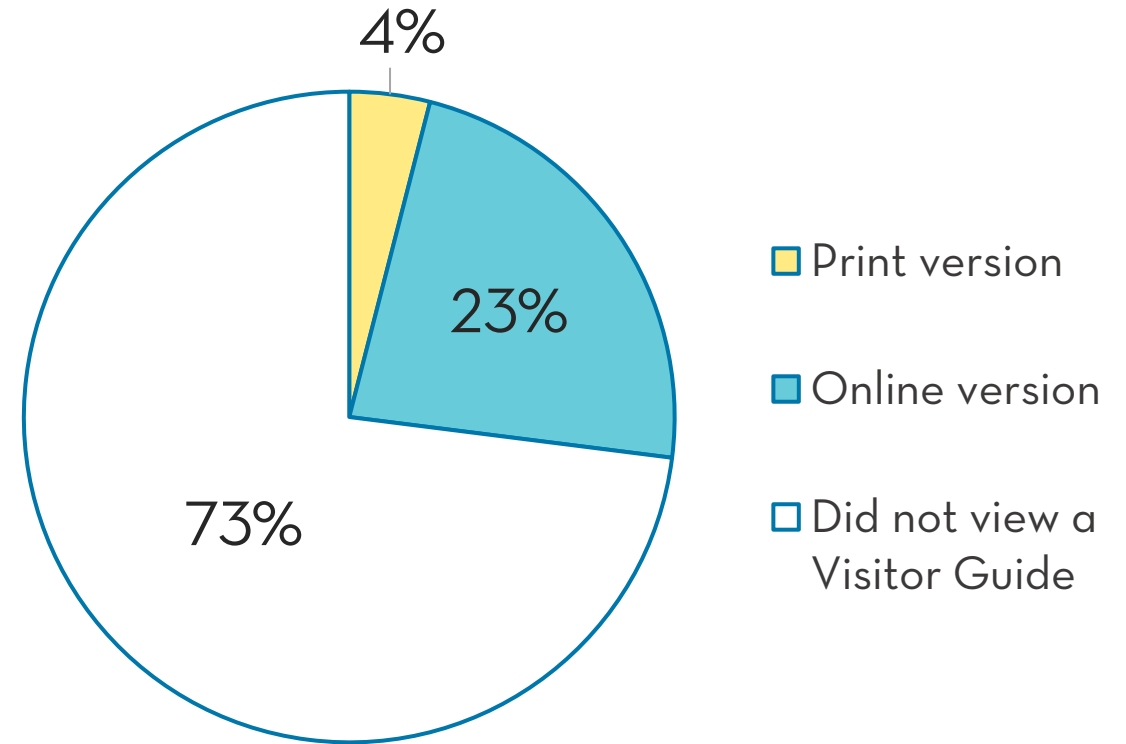


¹ Multiple responses permitted.

WALTON COUNTY VISITOR GUIDE

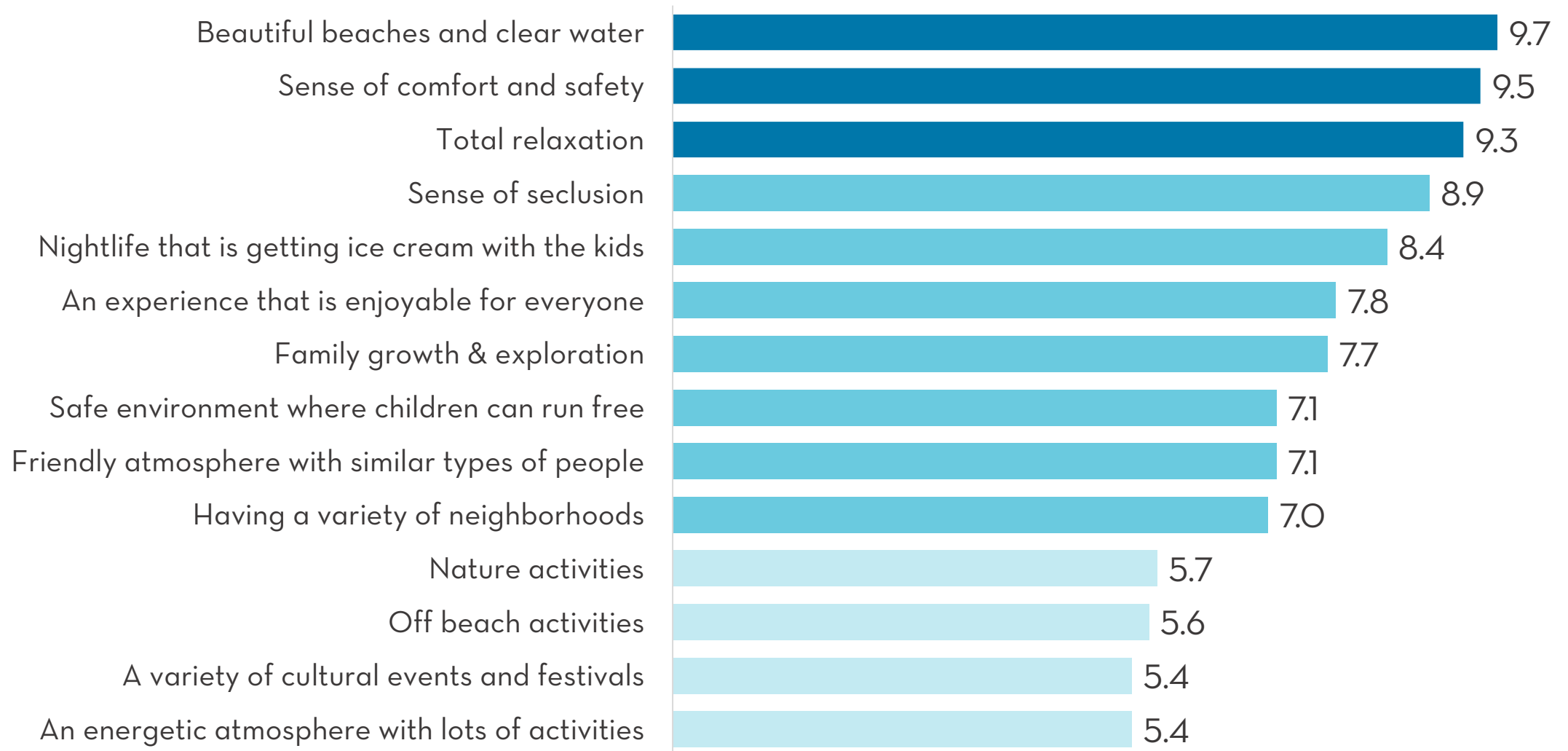
Over 1 in 4 visitors view a Walton County Visitor Guide before going to the area (+3% points from 2024, +3% points from 2024 for the online version)

Fall visitors give the Visitor Guide a rating of **9.2 out of 10¹** (8.9 in 2024)



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.

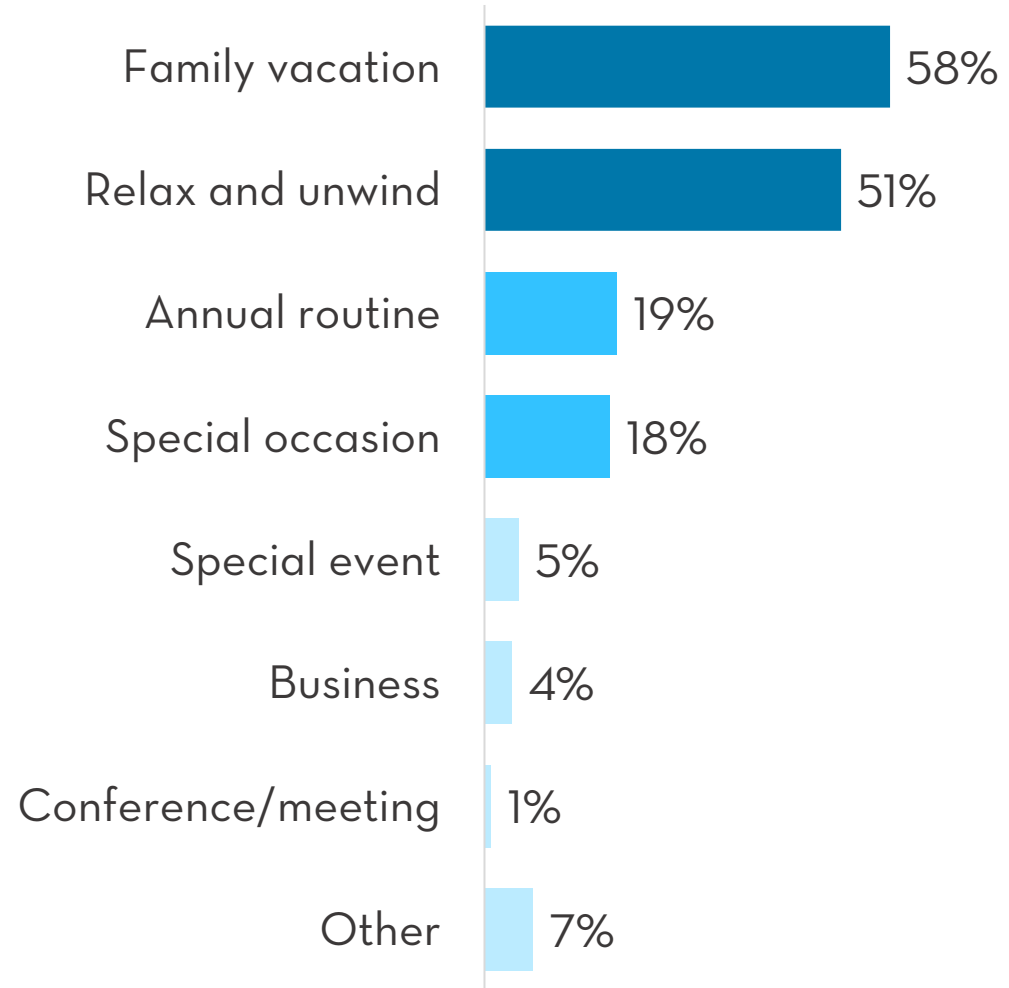
REASONS FOR VISITING¹



Nearly 3 in 5 Fall visitors come for a **family vacation**



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



¹Multiple responses permitted.

WALTON COUNTY PROMOTIONS¹



26% (+1% points from 2024) of Fall visitors recall advertising, promotions, or travel stories for Walton County

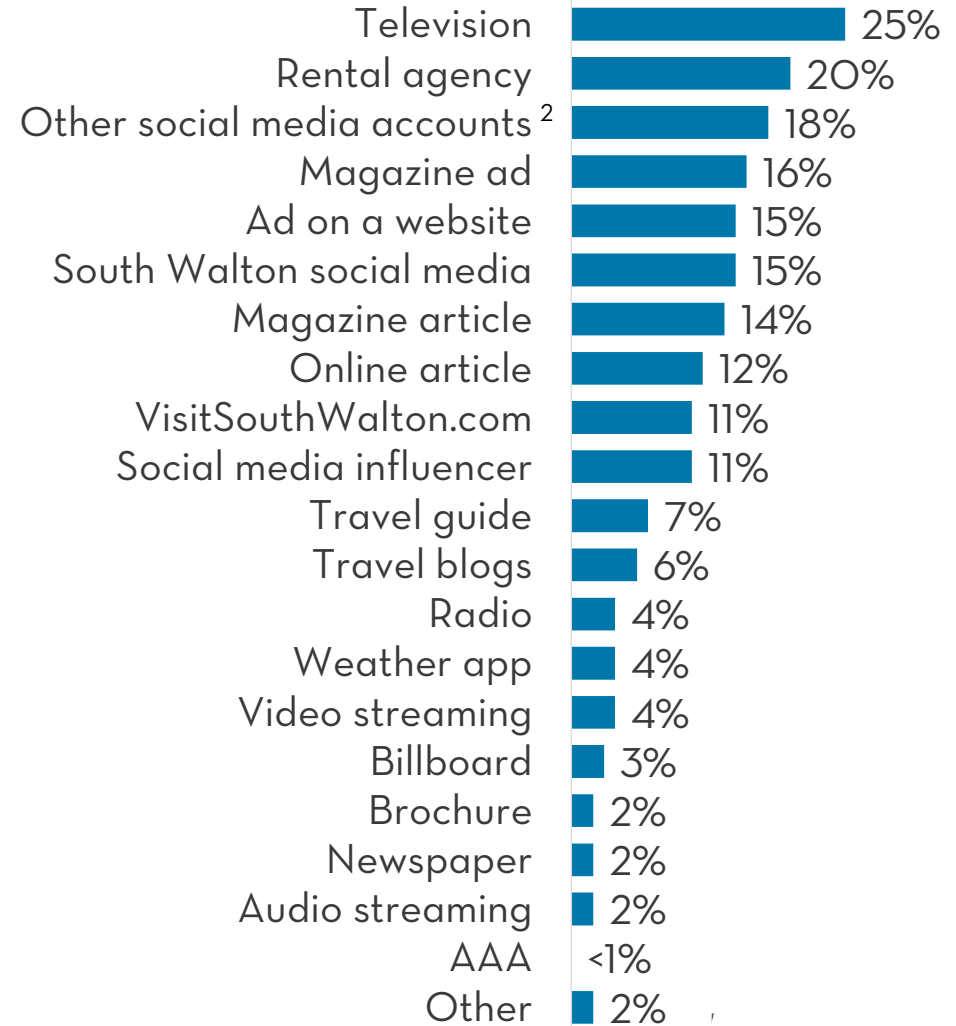


This information influences **10%** (+2% points from 2024) of all visitors to visit Walton County



Ad recall from **rental agencies** increased **3% points** from 2024.

Base: **26%** of visitors who recall advertising



¹Multiple responses permitted.

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

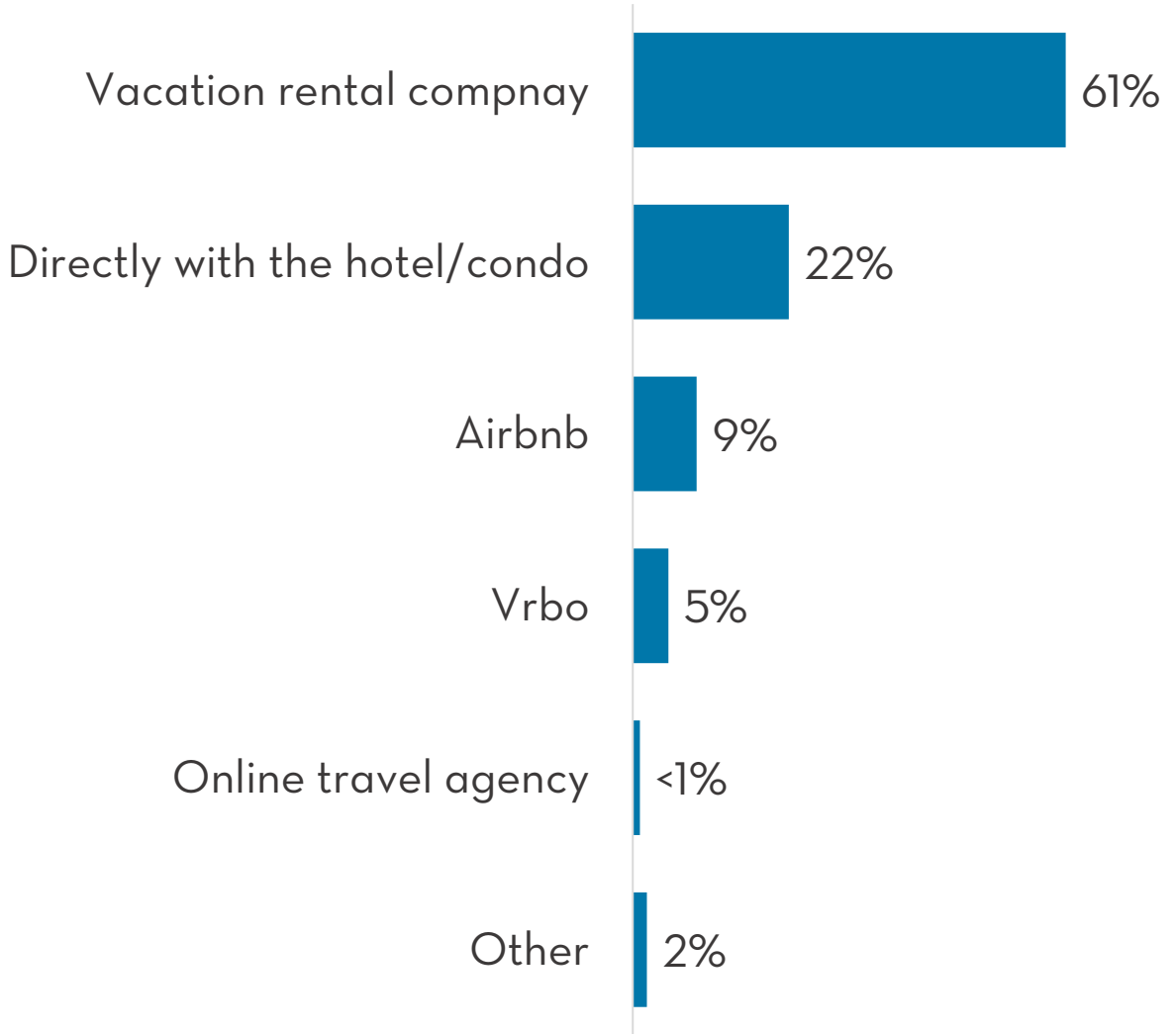
BOOKING ACCOMMODATIONS



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



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



VISITOR TRANSPORTATION

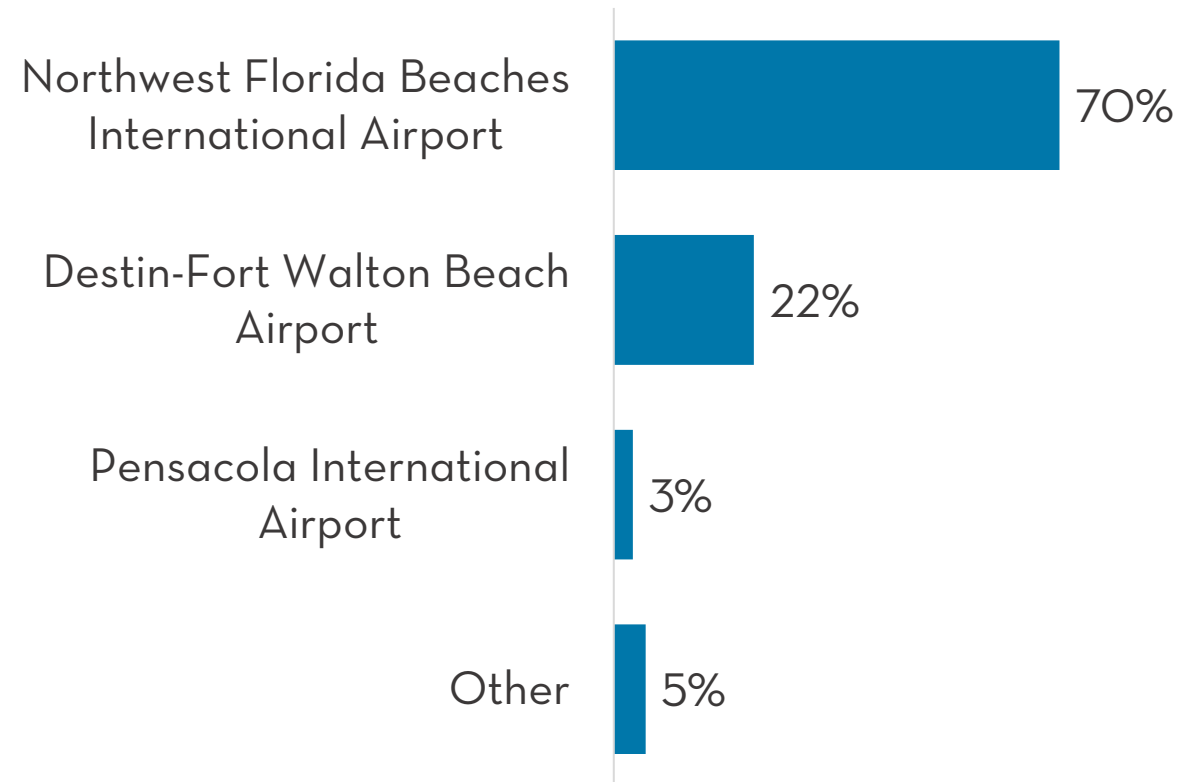


76% (+1% points from 2024) of Fall visitors drive to Walton County



18% (-5% points from 2024) 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

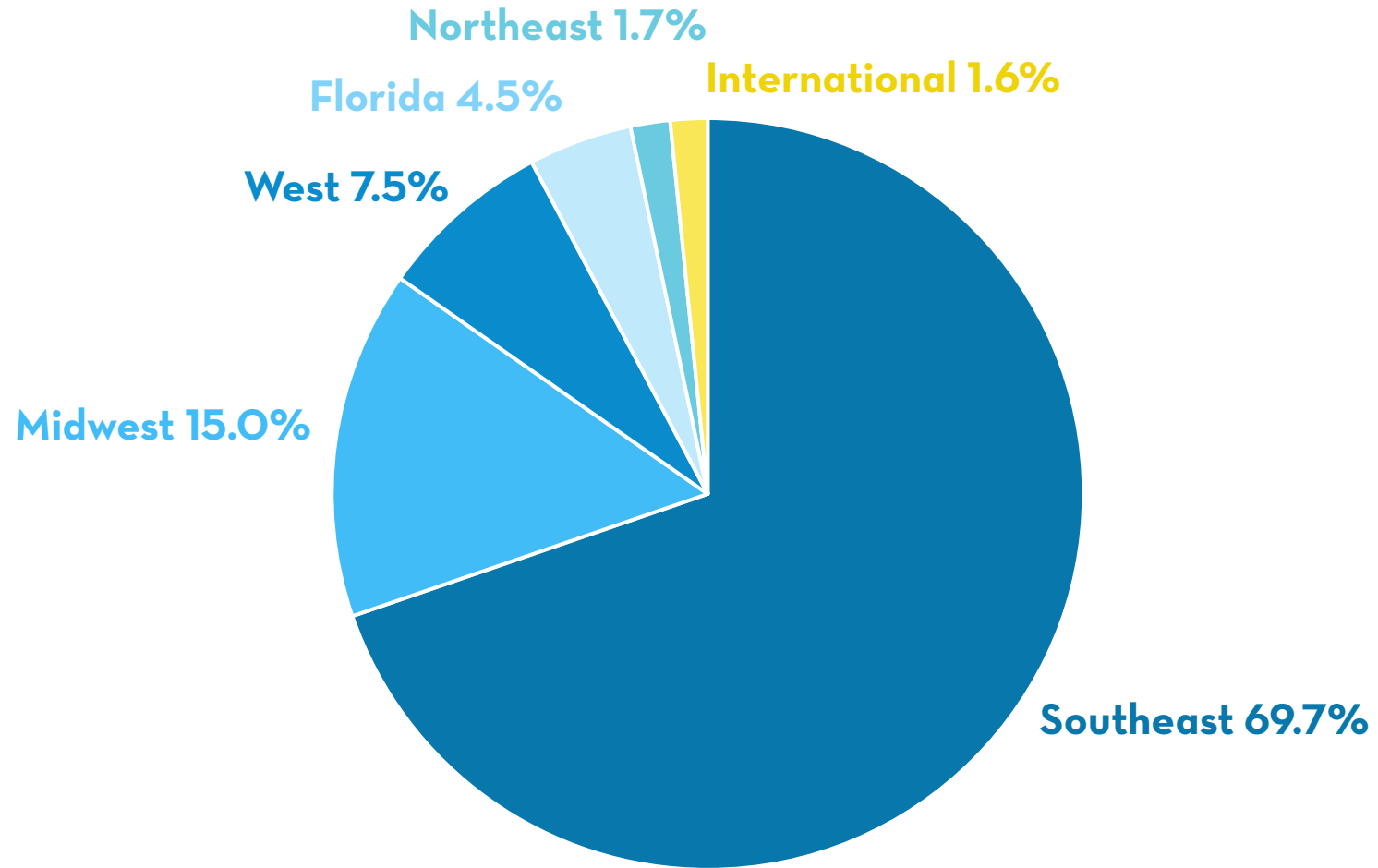
24% who **fly** use the following airports:



VISITOR JOURNEY: TRAVEL PARTY PROFILE



ORIGIN OF FALL VISITORS



ORIGIN OF FALL VISITORS

State	% of Visitors
Georgia	15.2%
Tennessee	13.7%
Alabama	11.9%
Mississippi	9.6%
Texas	8.0%
Florida	4.5%
Kentucky	3.8%
Louisiana	3.6%
Indiana	3.5%
Oklahoma	2.5%
Arkansas	2.1%
North Carolina	2.0%



ORIGIN OF FALL VISITORS

14.0% (+0.8% points from 2024) of all visitors come from the **Atlanta** market

8.0% (-1.8% points from 2024) of visitors are from the **Nashville** market

Top Origin Markets	% of Visitors
Atlanta	14.0%
Nashville	8.0%
Mobile-Pensacola	4.3%
Columbus-Tupelo-West Point	3.8%
Memphis	3.5%
Birmingham	3.4%
Houston	3.2%
Montgomery	2.9%
Dallas-Fort Worth	2.9%
Indianapolis	2.6%
Huntsville-Decatur-Florence	2.2%
New Orleans	2.2%
Knoxville	2.0%

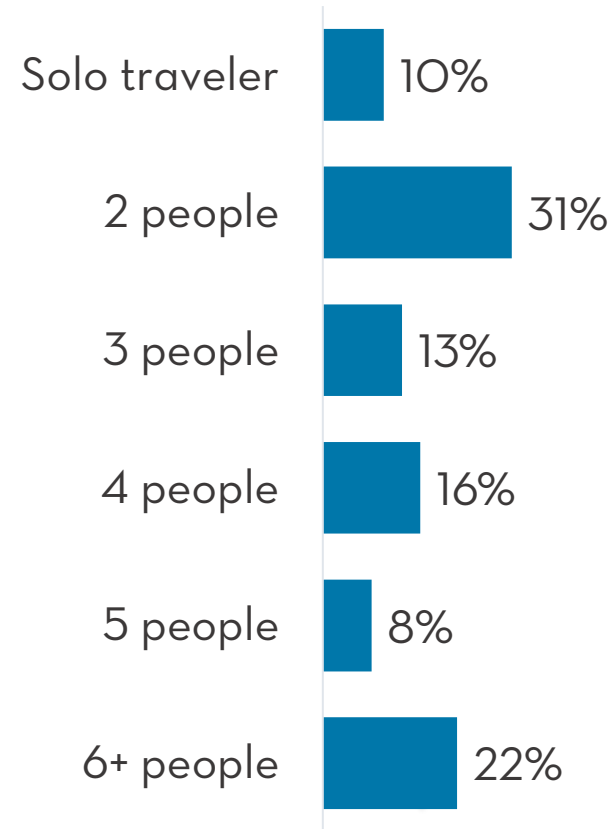
TRAVEL PARTY SIZE AND COMPOSITION



Visitors travel in a party composed of **4.1** people (4.1 in 2024)



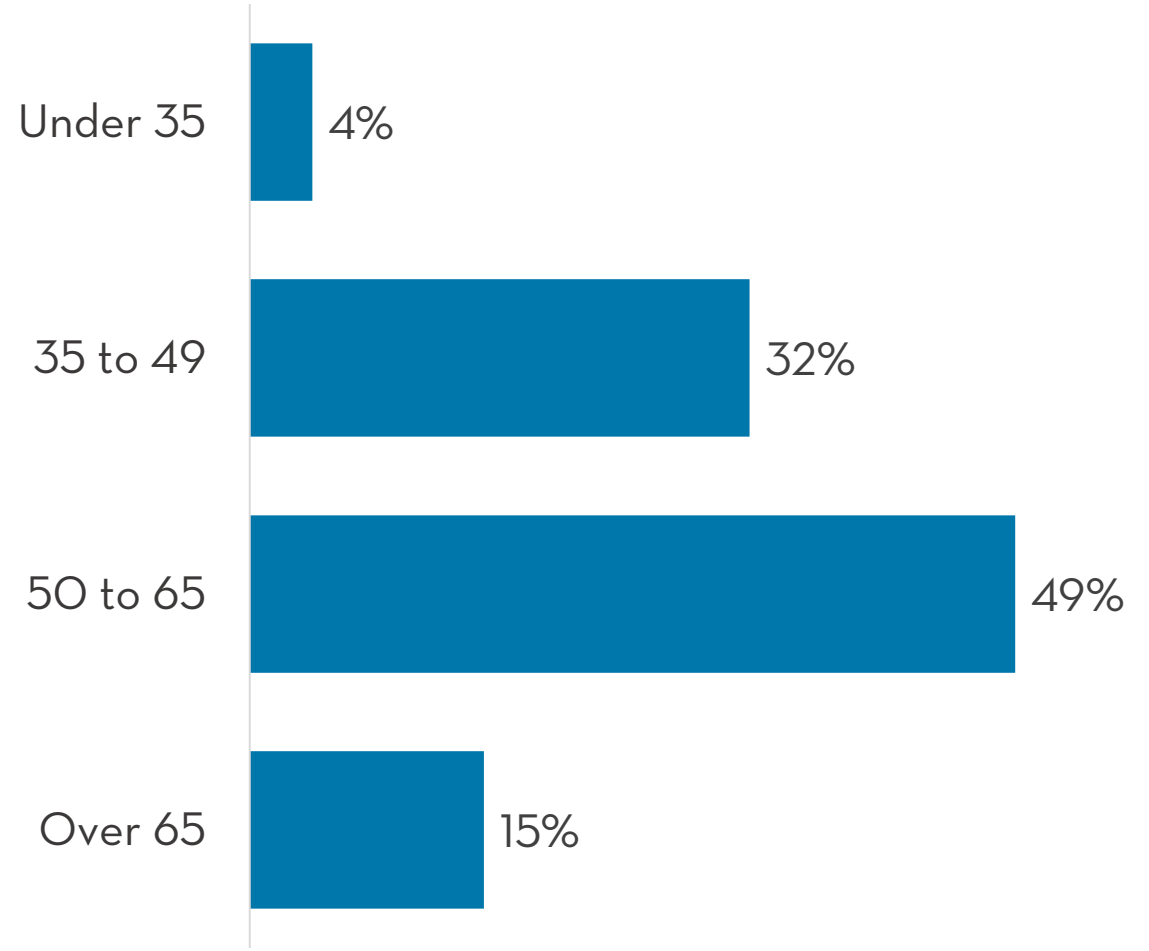
43% (consistent with 2024) of visitors travel with children under the age of 20



AGE OF FALL VISITORS¹



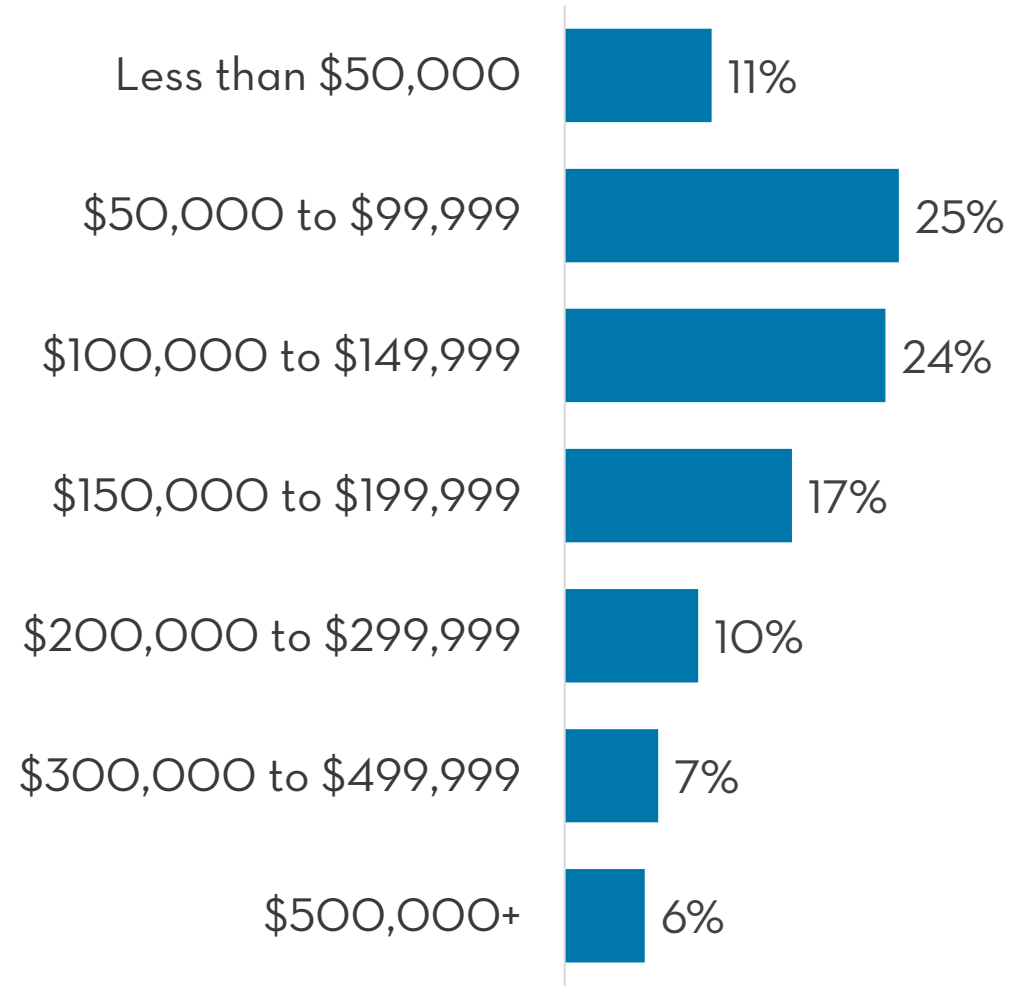
Median age of Fall visitors is **54 years old** (consistent with 2024)



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

Fall visitors have a **median** household income of **\$129,200** (\$130,000 in 2024), while estimated **average** household income is **\$167,000** (\$179,300 in 2024)



VISITOR JOURNEY: TRIP EXPERIENCE



VISITOR ACCOMMODATIONS



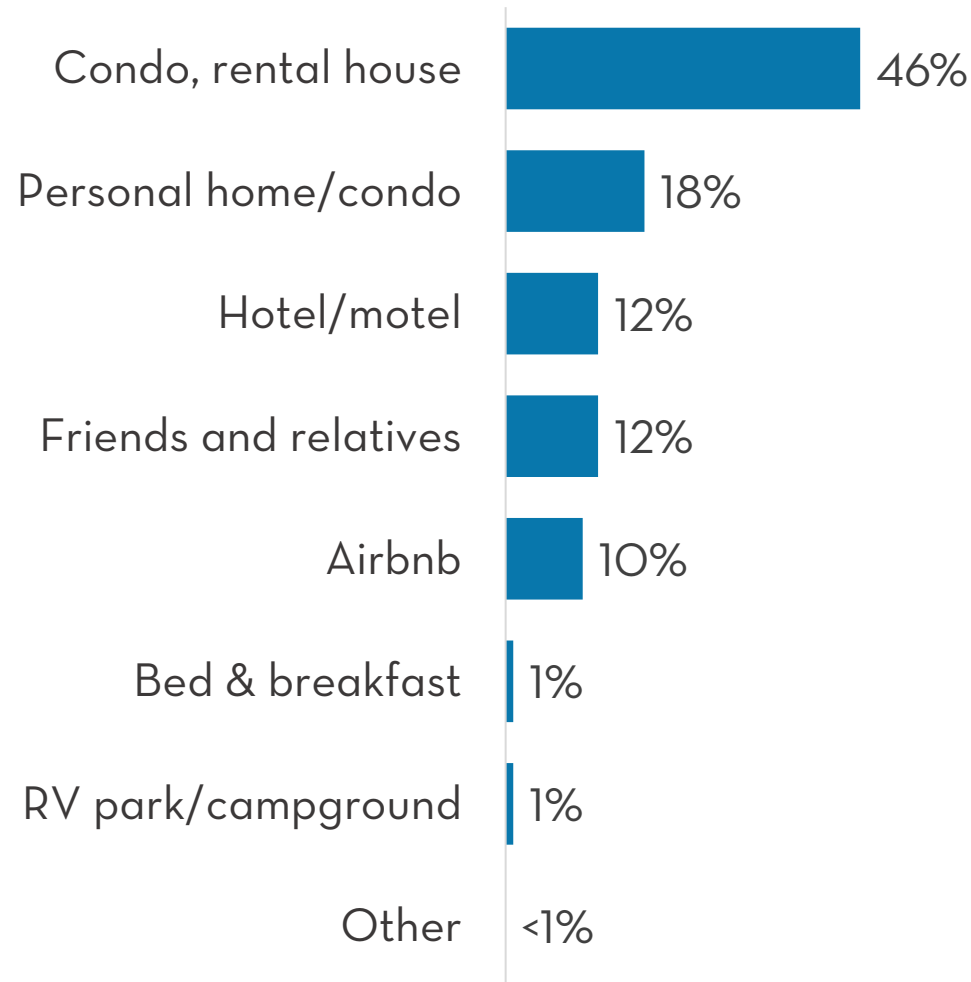
Nearly half of Fall visitors stay in a condo or rental house



18% visitors stay in their personal home or condo



12% stay in a hotel/motel or with friends and relatives



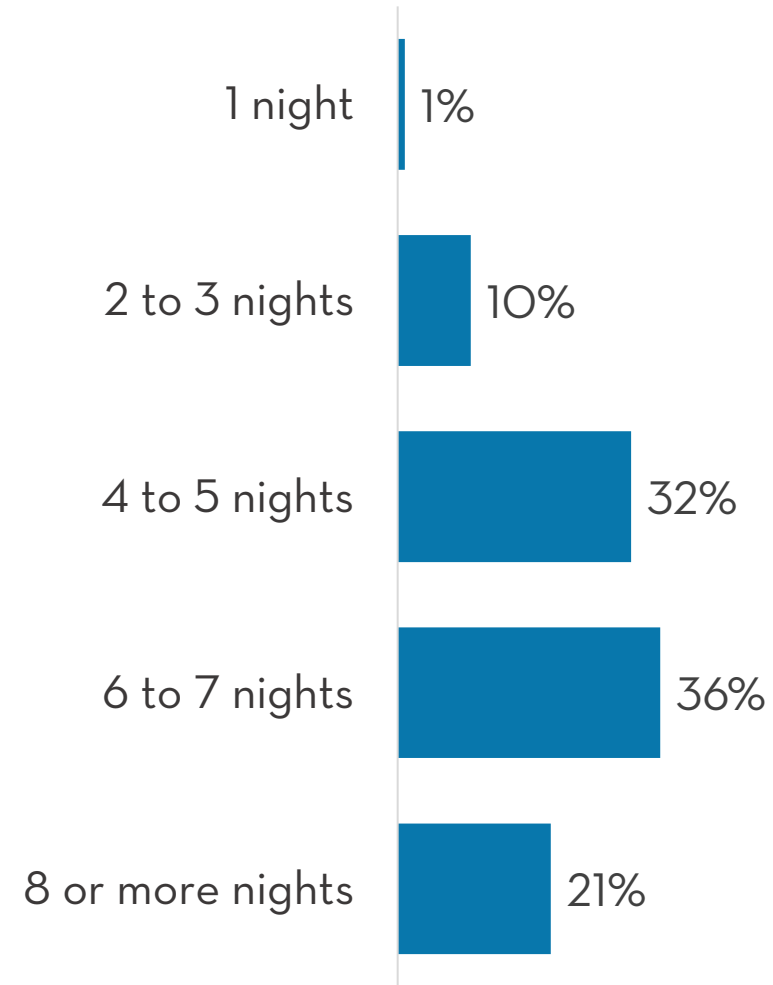
LENGTH OF STAY



Fall visitors¹ stay an average of **6.1** nights² in Walton County (5.9 nights in 2024)



Fall visitors staying in paid accommodations spend an average of **6.0** nights² in Walton County (6.1 nights in 2024)



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



13% (+2% points from 2024) of Fall visitors are visiting for the first time



35% (-6% points from 2024) of Fall visitors have visited Walton County more than 10 times

That was my first time



13%

2 - 3



19%

4 - 5



16%

6 - 10



17%

11 - 20



16%

21+



19%

VISITOR ACTIVITIES¹

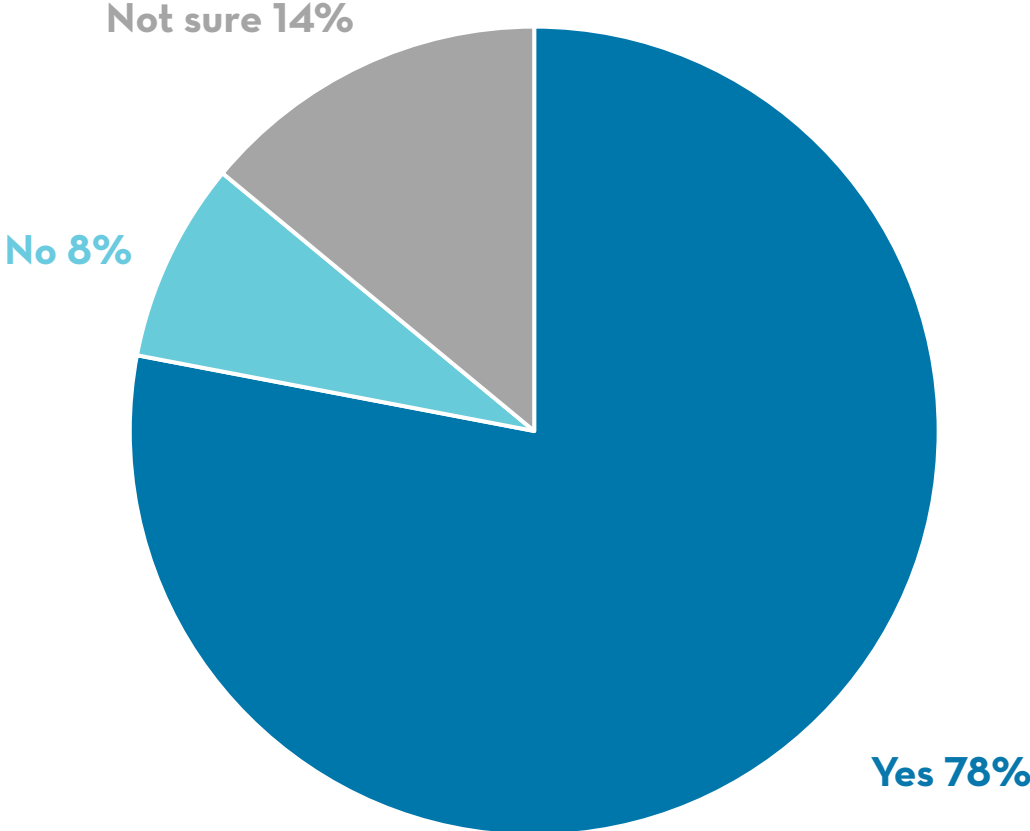


¹Multiple responses permitted.

BEACH SAFETY



78% of Fall visitors know there are flags posted along the beaches to indicate how safe it is to go into the water



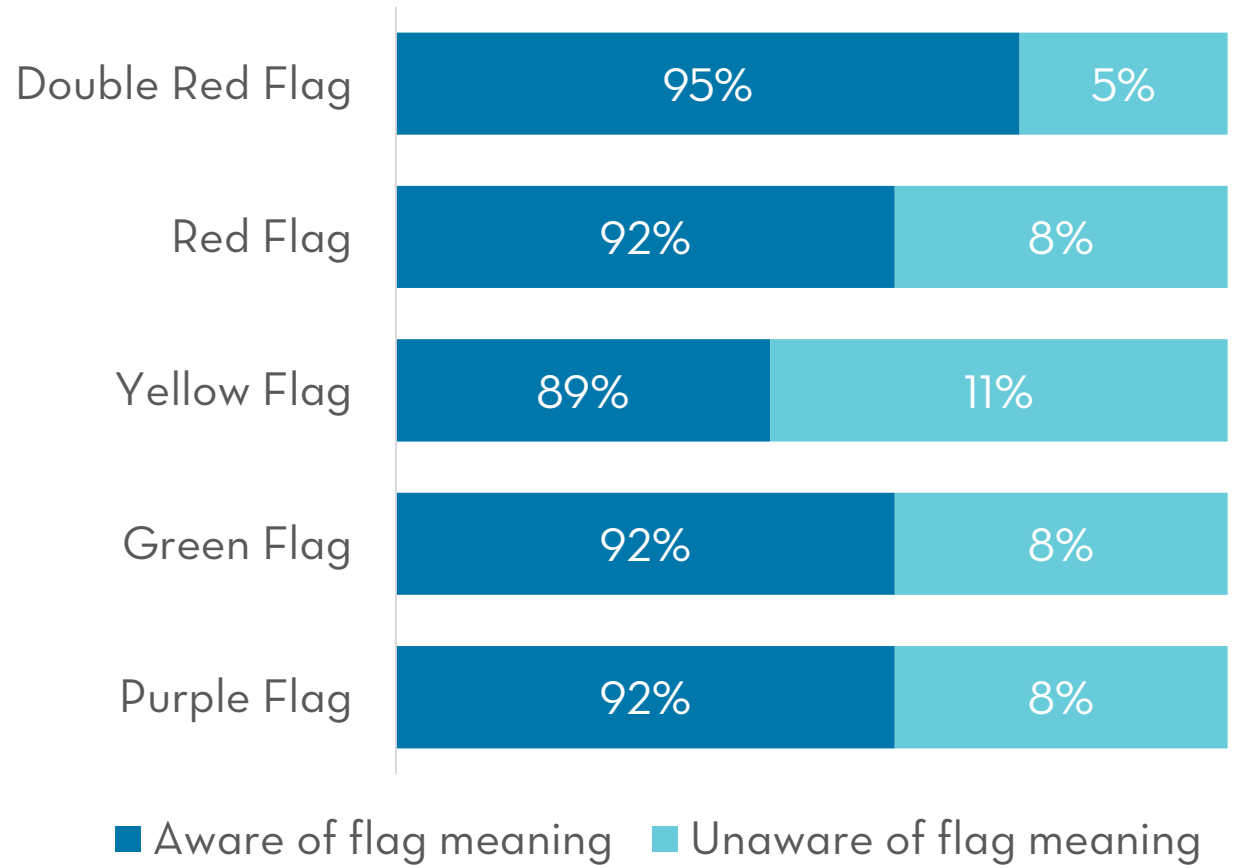
BEACH FLAG AWARENESS



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



73% (+4% points from 2024) 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 EXPENSES¹

- » The typical travel party spends **\$607** (\$640 in 2024) a day while in Walton County.
- » The typical travel party spends a total of **\$3,720** (\$3,790 in 2024) while visiting Walton County.

Spending Category ¹	Average Daily Expenditure	Total Trip Expenditure
Accommodations	\$260	\$1,590
Restaurants	\$117	\$720
Groceries	\$57	\$350
Shopping	\$93	\$570
Entertainment	\$33	\$200
Transportation	\$38	\$230
Other	\$9	\$60
Total	\$607	\$3,720

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 **9.4** (consistent with 2024) as a place to vacation

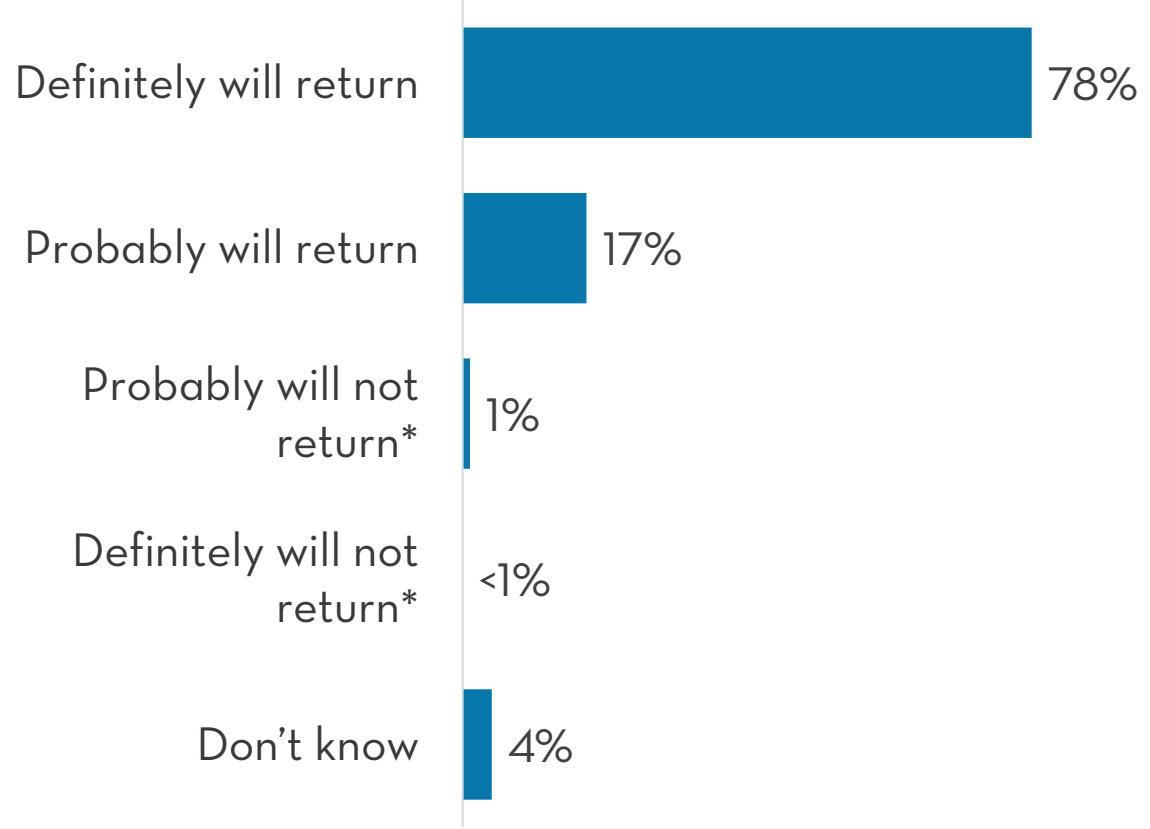


Nearly 4 in 5 Fall visitors will definitely return to Walton County



Only 5% of visitors are uncertain about returning. Top reasons² include:

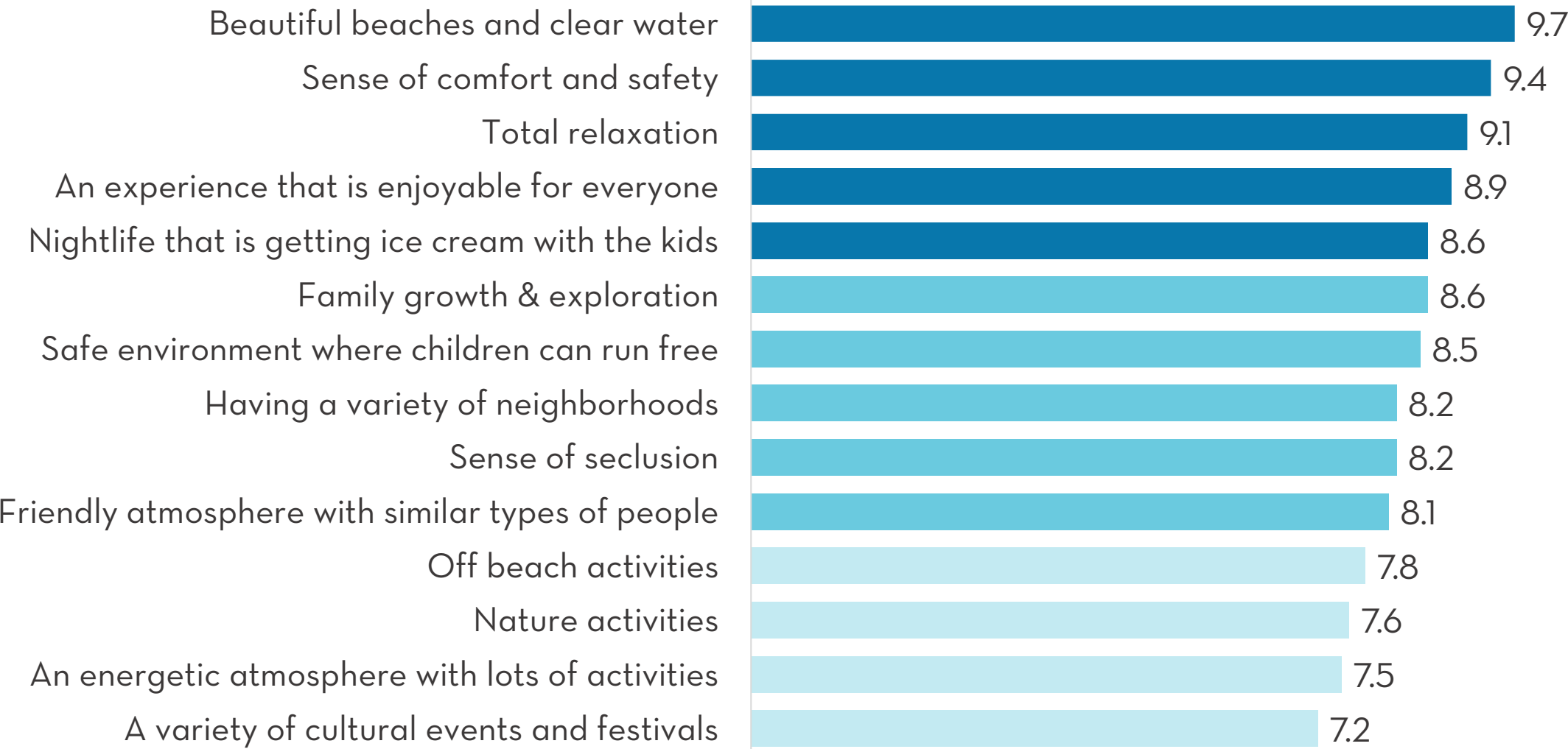
- 1. Too expensive
- 2. Limited shopping and entertainment
- 3. Too crowded



¹10 = Excellent; 1= Poor

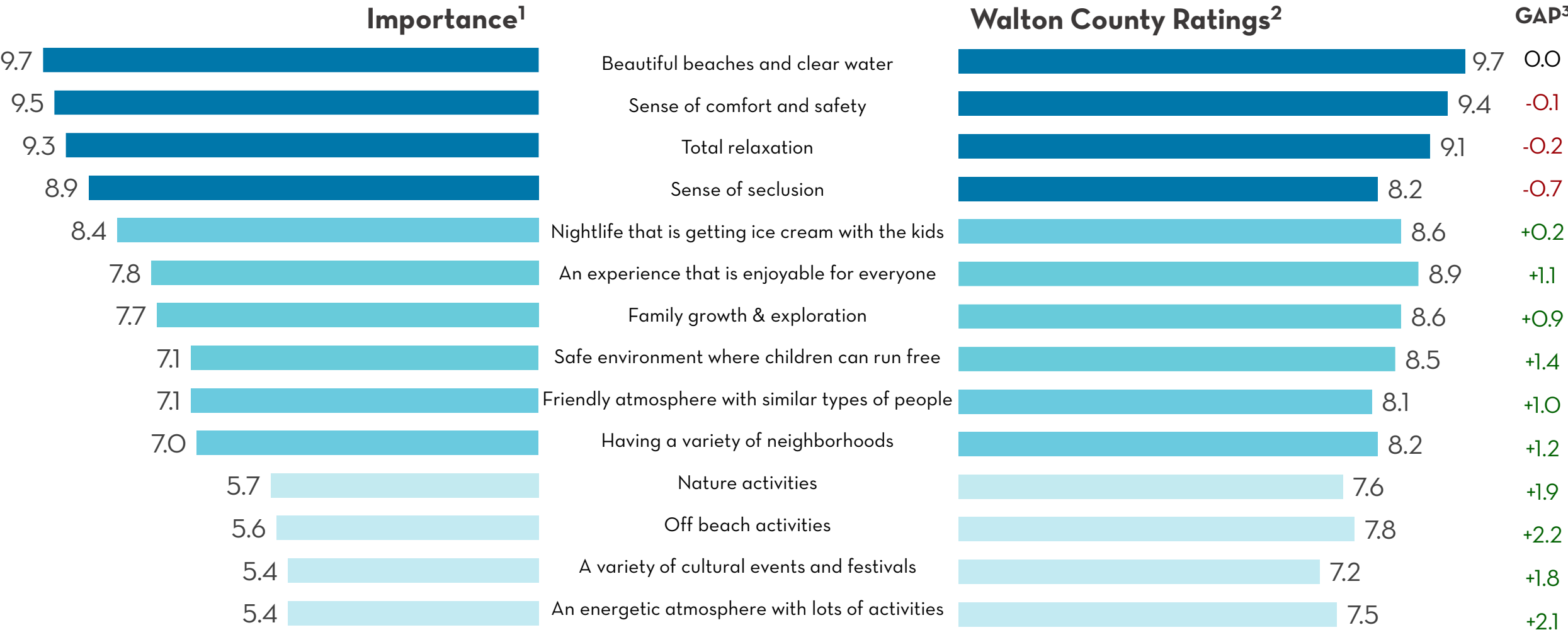
²Reason for uncertainty about returning to Walton County should be interpreted cautiously due to the small sample size answering the question.

RATING WALTON COUNTY ATTRIBUTES¹



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 9.7. Visitors rated WC as 9.7 on its beaches. Hence, the GAP is 0.0.

AREA DESCRIPTIONS



"Powdered sugar beaches, emerald green water, warm sunshine, and excellent restaurants."

"Relaxing- but with plenty to do for everyone!"

"We come down every year for a girl's trip because we love the cool air and the small crowds this time of the year."

"Pristine beaches, delicious food, nice condos, great shopping and things to do with family."

"Upscale, clean, good restaurants, several choices for accommodations, different beach communities."

"We have always wanted to visit and are absolutely ecstatic we did!"

AREA DESCRIPTIONS



"It feels like belonging to a hidden coastal community rather than just visiting a beach."

"South Walton is a nice and relaxing beach vacation destination. There are plenty of restaurants and shopping within close proximity."

"Great beach! Quiet in the off season, plenty of good restaurants, weather is great in the fall."

"Amazing! We can't wait to go back."

"I love coming to the beach for business! It makes me feel like I have a mini vacation."

FEELINGS ASSOCIATED WITH WALTON COUNTY



"We are so excited and happy to be getting married on the beach! These are the most beautiful beaches in the world, and it makes us so happy!"

"Feels like home."

"Thankful."

"Feels like we are in a different world."

"We love this sunshine weather over here. It makes me so happy."

"Serene."

OPPORTUNITIES FOR IMPROVEMENT



"It's a fabulous place. Plenty of shops, safe atmosphere, beautiful beaches, and great restaurants. The only negatives are parking and crowds."

"Beautiful. Getting too crowded."

"Beautiful beaches, nice people, good food but pricy. Not a lot to do a night if that is what you are looking for. Gorgeous nature."

WALTON COUNTY TOURISM

Fall 2025 Visitor Tracking Study September - November 2025

Downs & St. Germain Research
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