

WALTON COUNTY TOURISM

Spring 2024 Visitor Tracking Study
March - May 2024



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Visitor Tracking Study

This report is based on 819 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 2024.

EXECUTIVE SUMMARY



SEASONAL SNAPSHOT

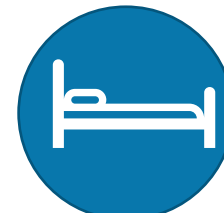
Spring 2024

- Lodging metrics including occupancy, number of visitors, and room nights are down compared to Spring 2023, partially due to a statewide trend of visitation dropping compared to 2023 because of an increase in domestic visitors going abroad, cruises returning to pre-pandemic levels, etc.
- Direct spending and economic impact of tourism were down year over year, due to a decrease in the numbers of visitors, a decrease in ADR, and lower spending per travel party. This reflects national trends of visitors prioritizing travel while exercising economic caution by spending less during trips.
- The top attributes considered most important to Walton County visitors (beautiful beaches and clear water and a sense of comfort and safety) also received the highest ratings for Walton County.
- More visitors recall seeing advertisements for Walton County on various other social media accounts than through any other type of promotion. Television and Walton County social media accounts are also highly recalled promotion sources.
- Nearly 1 in 4 visitors mentioned crowded beaches, restaurants, and other amenities when asked to describe Walton County.



1,331,700

**TOTAL
VISITORS**



1,028,400

**ROOM
NIGHTS**



\$ 1,157,388,200

**DIRECT
SPENDING**

vs. 2023

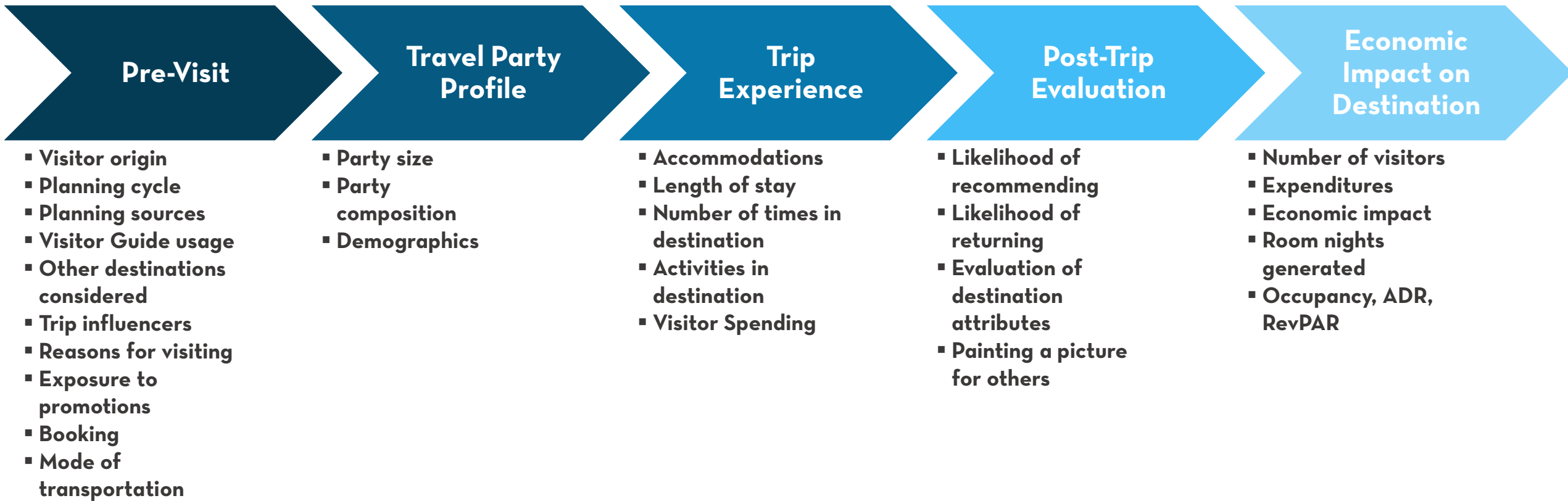
↓ 5.1%

↓ 6.8%

↓ 9.1%

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 – SPRING 2023 VS. 2024

- » Lodging metrics including occupancy, number of visitors, and room nights are down compared to Spring 2023, partially due to a statewide trend of visitation dropping compared to 2023 because of an increase in domestic visitors going abroad, cruises returning to pre-pandemic levels, etc.
- » Direct spending and economic impact of tourism were down year over year, due to a decrease in the numbers of visitors, a decrease in ADR, and lower spending per travel party. This reflects national trends of visitors prioritizing travel while exercising economic caution by spending less during trips.

Visitor Metrics	Spring 2023	Spring 2024	% Δ
Room nights	1,103,600	1,028,400	-6.8%
Total visitors	1,402,900	1,331,700	-5.1%
TDT collections	\$16,389,488 ¹	\$16,803,580	+2.5%
Direct spending	\$1,273,124,000	\$1,157,388,200	-9.1%
Economic impact ²	\$1,823,401,600	\$1,689,786,800	-7.3%
Occupancy	62.7%	55.2%	-12.0% ³
Room rates	\$408.94	\$376.29	-8.0% ³
RevPAR	\$256.41	\$207.71	-19.0% ³

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 Updated to latest collection information.

² The economic impact multiplier for Walton County in 2024 is 1.46. In 2023 it was 1.43.

³ Decreases in occupancy and room rates are partially due to changes in Key Data's database.

LODGING STATISTICS¹

55.2%

Occupancy

↓ 12.0%

\$376.29

ADR

↓ -8.0%

\$207.71

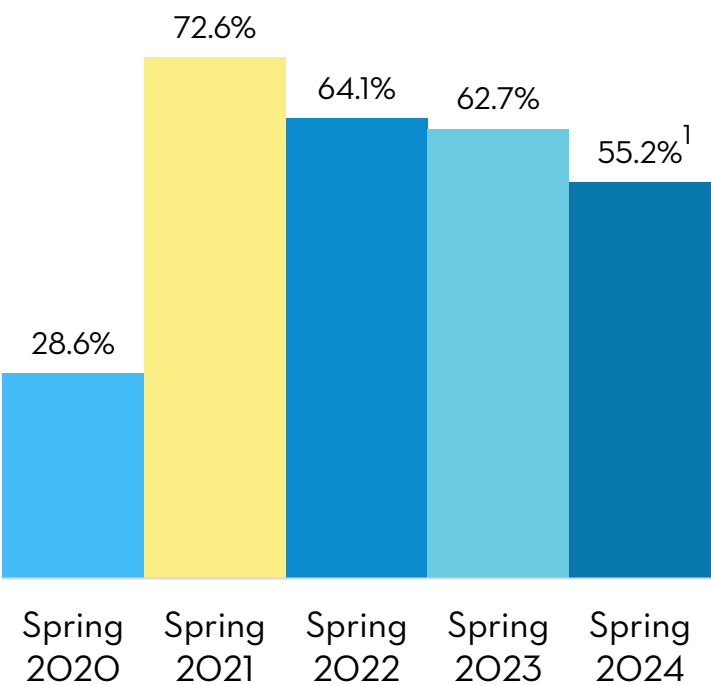
RevPAR

↓ -19.0%

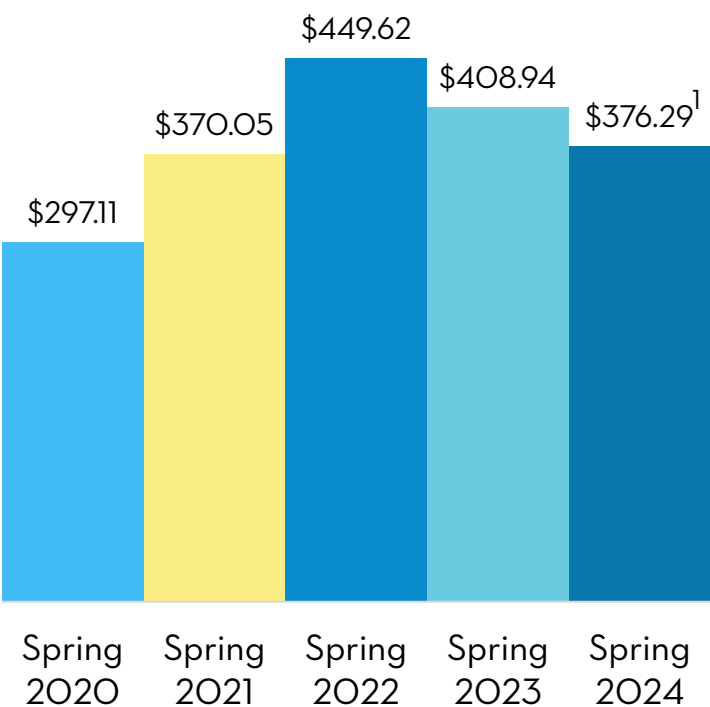
¹ Decreases in occupancy and room rates are partially due to changes in Key Data's database.

5-YEAR OVERVIEW - LODGING METRICS

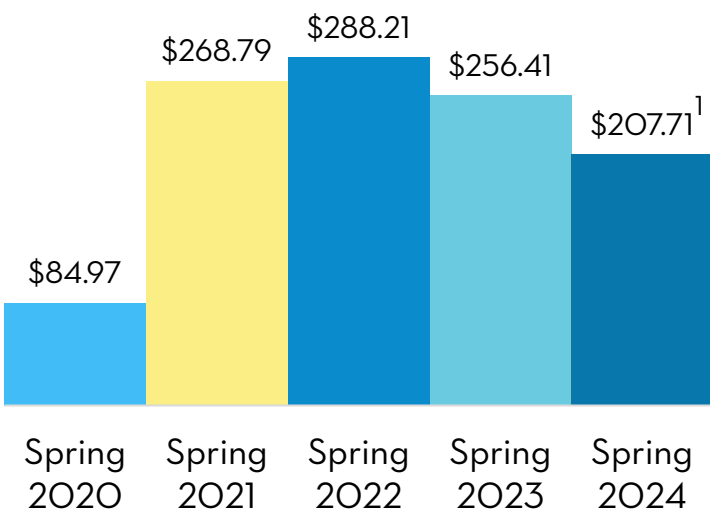
Occupancy Rate



Average Daily Rate



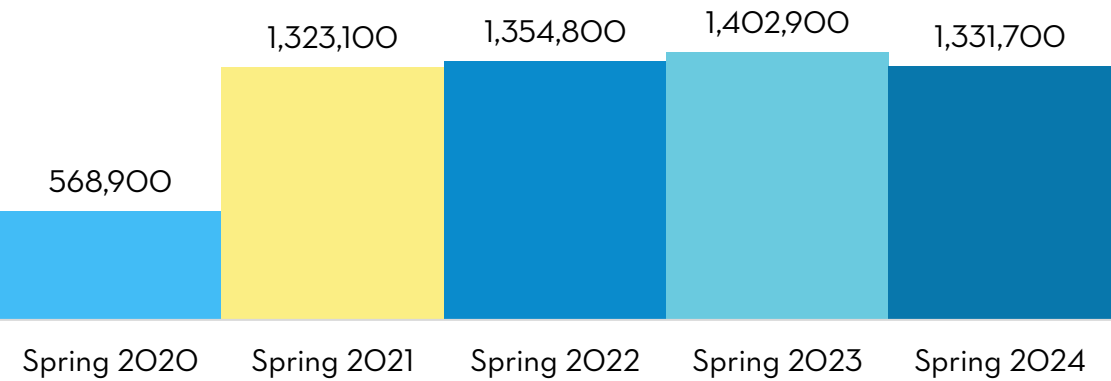
Revenue per Available Room



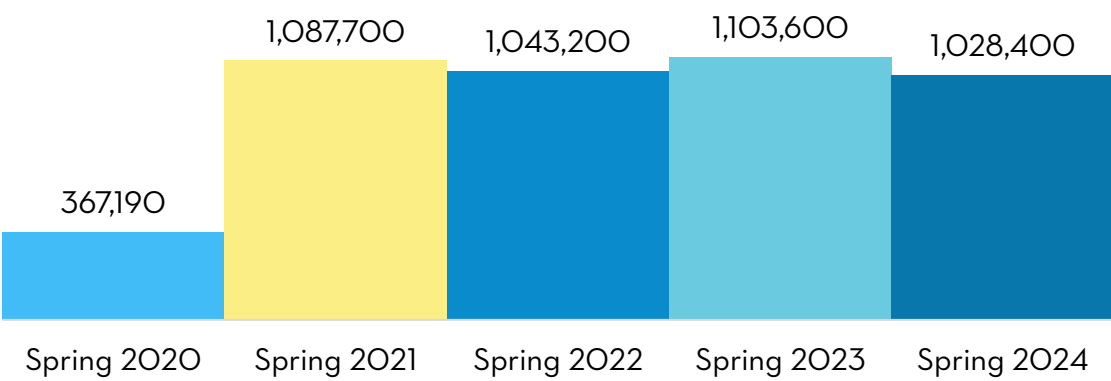
¹ Decreases in occupancy and room rates are partially due to changes in Key Data's database.

5-YEAR OVERVIEW – TOURISM METRICS

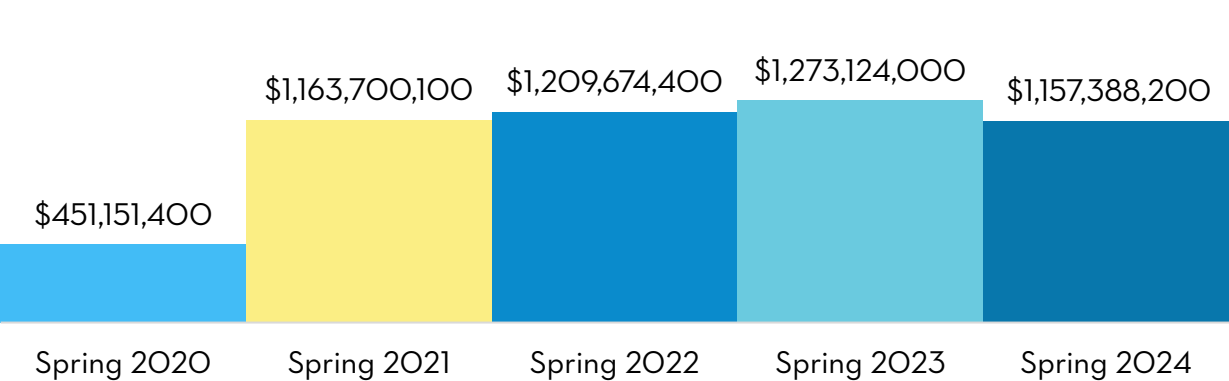
Visitors



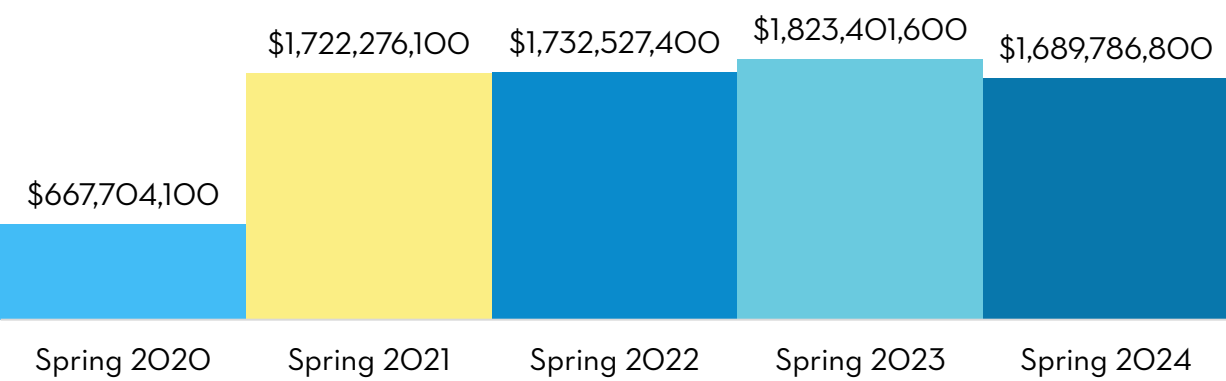
Room Nights



Direct Spending



Economic Impact



VISITOR JOURNEY: PRE-VISIT

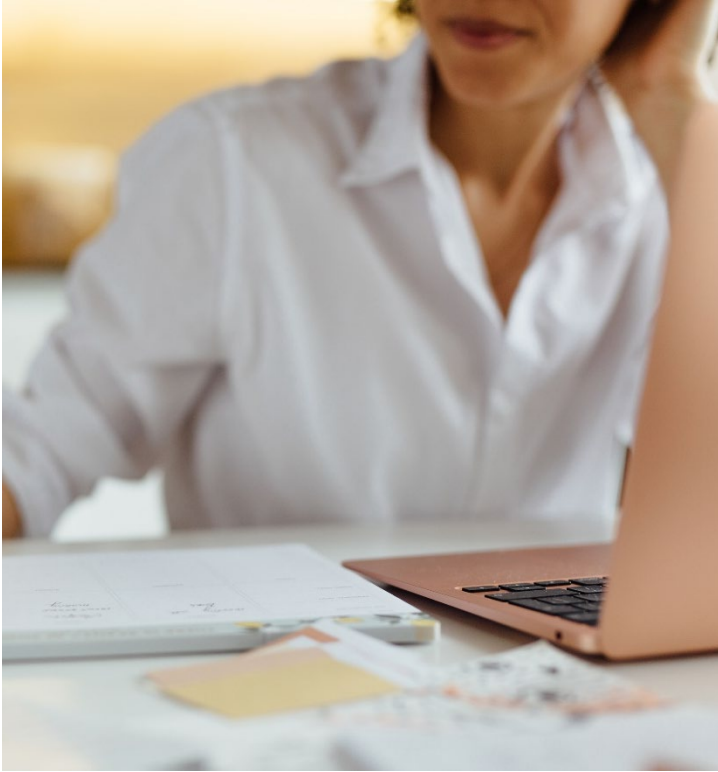


PLANNING CYCLE

- » **Nearly 2 in 3** visitors plan a Walton County Spring vacation at least 3 months in advance
- » Average trip planning cycle began **99 days** before the trip (**98 days in 2023**)
- » **68%** (+5% points from 2023) of Spring visitors considered only 1 of the Walton County beach neighborhoods as opposed to deciding among several



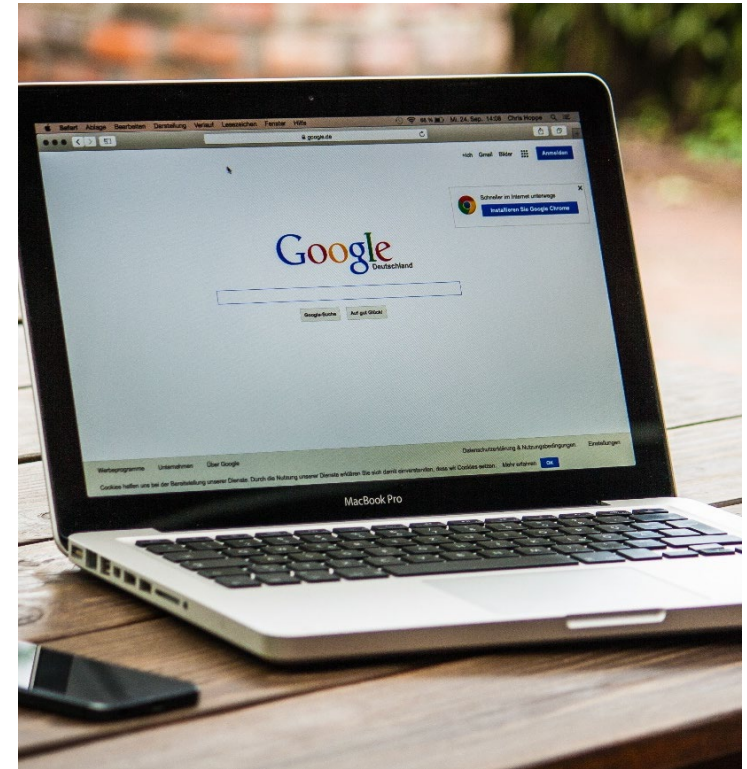
TOP TRIP PLANNING SOURCES*



Vacation rental website **52%**
(54% in 2023)



Friends/family **35%**
(37% in 2023)



Search engines **21%**
(22% in 2023)

*Multiple responses permitted.

WALTON COUNTY VISITOR GUIDE

- » **18%** of visitors viewed (mostly online¹) Walton County's Visitors Guide before going to the area
- » Visitors Guide received a rating² of **8.6 out of 10** (+0.1 points from 2023)



¹14% used the online version & 4% used the print version.

²10 = Extremely useful; 1 = Not at all useful.

TOP REASONS FOR VISIT*



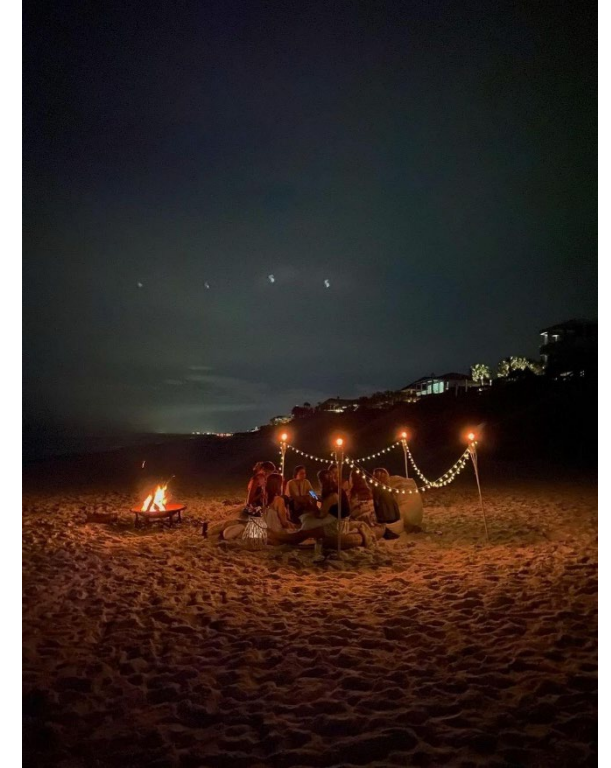
Family vacation **62%**
(65% in 2023)



Relax & unwind **58%**
(57% in 2023)



Annual routine **23%**
(21% in 2023)



Special occasion **14%**
(14% in 2023)

ADVERTISING RECALL

- » **30%** (consistent with 2023) of visitors recalled promotions about Walton County
- » This information influenced **7%** (consistent with 2023) of all visitors to visit Walton County



TOP WALTON COUNTY PROMOTIONS¹

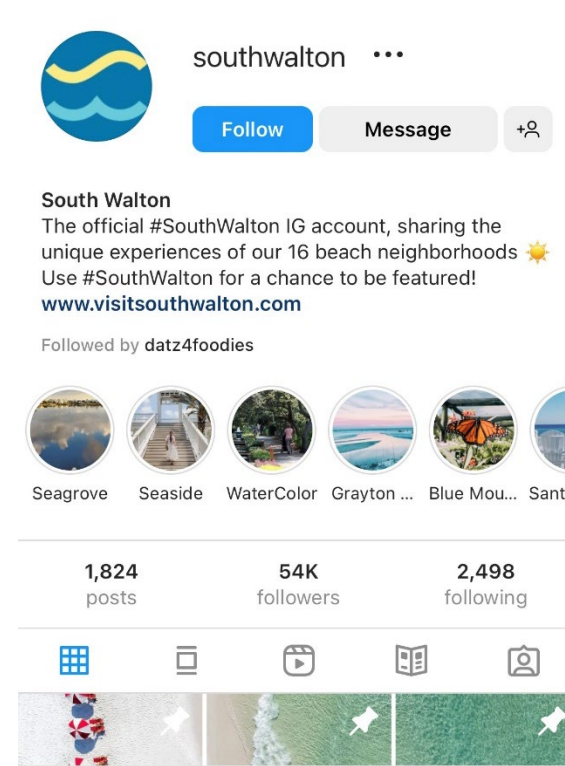
Base: 30% of visitors who recalled advertising



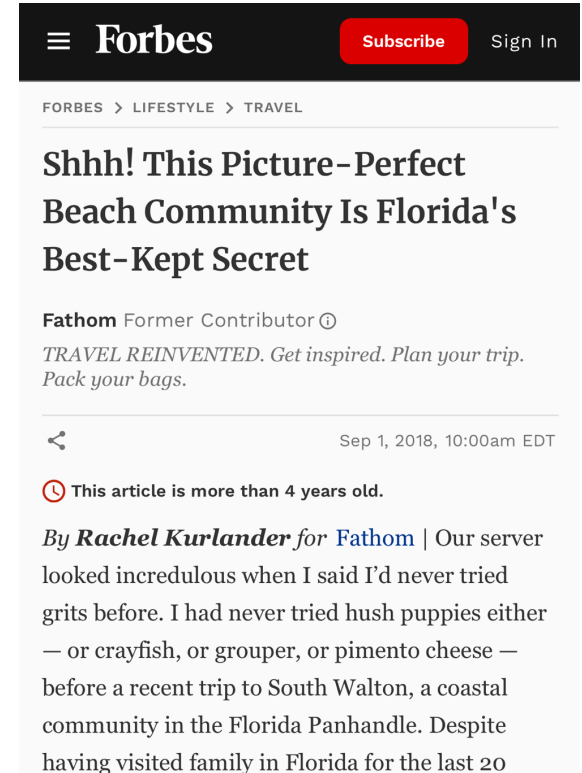
Other² social media accounts **30%**
(28% in 2023)



Television **22%**
(20% in 2023)



South Walton social media **18%**
(22% in 2023)



Online Article **17%**
(18% in 2023)

¹Multiple responses permitted.

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

TOP BOOKING SOURCES



Vacation Rental Company
60%



Directly with hotel/condo
19%



VRBO/HomeAway
10%

VISITOR TRANSPORTATION

- » **72%** of visitors drove to Walton County
- » **28%** (+2% points from 2023) who flew used the following airports:

67%

Northwest Florida Beaches
International Airport



24%

Destin-Ft. Walton Beach Airport



4%

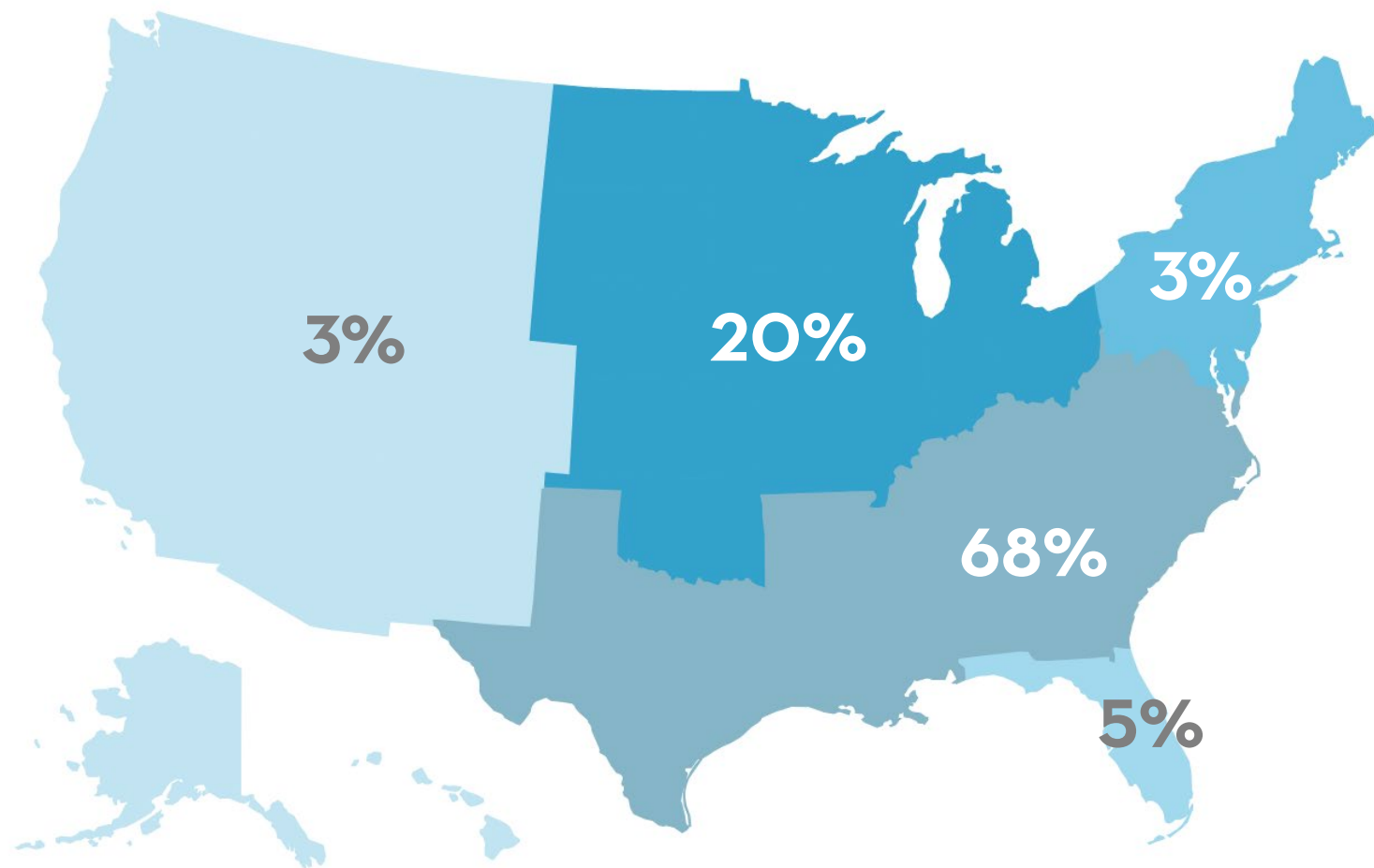
Pensacola International Airport



VISITOR JOURNEY: TRAVEL PARTY PROFILE

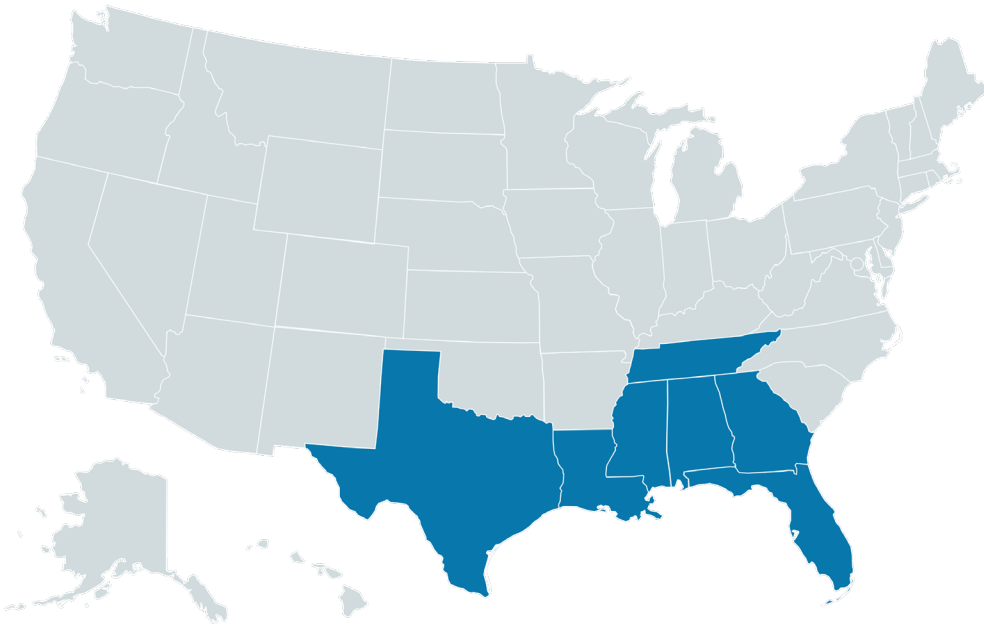


ORIGIN OF SPRING VISITORS



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

ORIGIN OF SPRING VISITORS



67% of visitors are from 7 states

- 15%** Georgia
- 13%** Tennessee
- 11%** Texas
- 10%** Alabama
- 8%** Mississippi
- 5%** Florida
- 5%** Louisiana

43% of visitors are from 10 markets

- 13%** Atlanta
- 10%** Nashville
- 4%** Birmingham
- 4%** Columbus-Tupelo-West Point
- 4%** Houston
- 4%** New Orleans
- 4%** Dallas-Fort Worth
- 3%** Memphis
- 3%** Mobile-Pensacola

TRAVEL PARTY SIZE AND COMPOSITION

The typical visitor traveled in a party composed of **4.5** people
(down from 5.0 in 2023)



50% traveled with at least one person under the age of 20 in their travel party
(-3% points from 2023)



SPRING VISITOR PROFILE

The typical Walton County Spring visitor:

- » **54** years old (54 years old in 2023)
- » Median household income of **\$156,700** (-\$10,000 from 2023)
- » **73%** from the Southeast including Florida (+1% point from 2023)



VISITOR JOURNEY: TRIP EXPERIENCE



TOP ACCOMMODATIONS

61% Condos, rental houses, etc.



15% Personal home/condo



8% Friends and relatives



7% Hotels



LENGTH OF STAY

- » Visitors¹ spent **6.2** nights² in Walton County (+0.2 nights from 2023)
- » Visitors staying in paid accommodations spent an average of **6.2** nights² in Walton County (+0.1 nights from 2023)



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

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

FIRST-TIME AND EXPERIENCED VISITORS

- » **14%** (consistent with 2023) were first-time visitors
- » **38%** (+1% point from 2023) have visited more than 10 times



TOP VISITOR ACTIVITIES*

Beach **95%**
(96% in 2023)



Restaurants **92%**
(93% in 2023)



Relax and unwind **84%**
(85% in 2023)



Shopping **74%**
(72% in 2023)



Family time, reading, cooking **68%**
(69% in 2023)



Biking, running **55%**
(53% in 2023)



*Multiple responses permitted.

BEACH SAFETY

- » **81%** of Spring visitors know there are flags posted along the beaches to indicate how safe it is to go into the water
- » **Over 4 in 5** Spring visitors are aware of the beach flag warning meanings
- » **67%** (+6% points from 2023) of Spring visitors are aware of the consequences of entering the Gulf during double red flag conditions



TRAVEL PARTY EXPENDITURES¹

- » Travel parties spent **\$656** a day
- » Travel parties spent **\$4,060** on their trip



¹ Visitors who stayed for up to 30 nights. Includes day trippers.

VISITOR JOURNEY: POST TRIP EVALUATION



VISITOR SATISFACTION

- » Visitors gave Walton County a rating¹ of **9.1** (-0.1 points from 2023) as a place to vacation
- » **77%** (+2% points from 2023) will definitely return to Walton County²

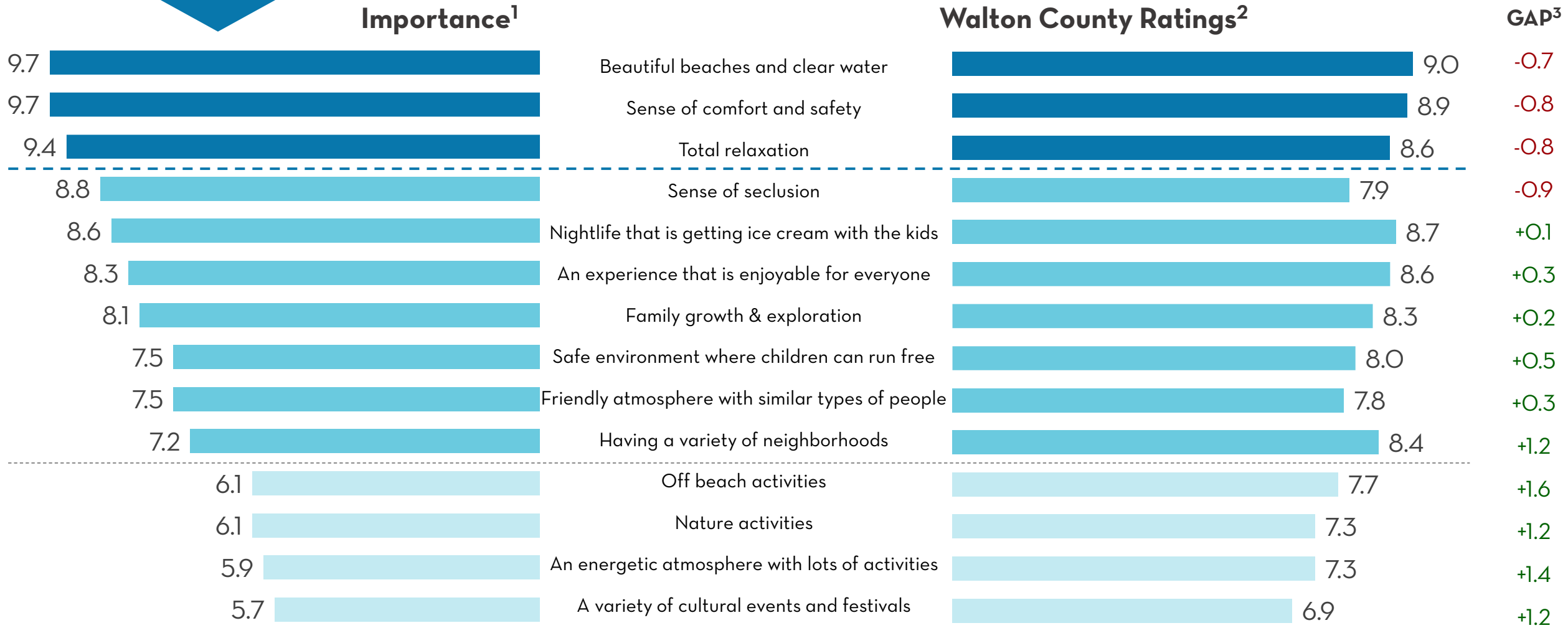


¹10 = Excellent; 1= Poor

²4% of all visitors will not return to Walton County for the following reasons:

1. Too crowded 2. Parking was a problem 3. Traffic was a problem

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 9.0 on its beaches. Hence, the GAP is -0.7.

VISITOR DESCRIPTIONS OF WALTON COUNTY

"Soft white beaches with clear blue water in a family friendly environment with lots of walking and biking paths."



"Beautiful ocean and beaches, wonderful charming architecture, fun shops & restaurants in a relaxed but fun and safe atmosphere."



"Felt like a European vacation. Different than other parts of Florida. Very charming and friendly."



YEARLY COMPARISONS



VISITOR PROFILE – SPRING 2023 VS. 2024

Visitor Metrics	Spring 2023	Spring 2024
Travel party	5.0	4.5
Kids <20	53%	50%
Median age	54	54
Estimated median household income	\$166,700	\$156,700
Stayed in condo/rental house	64%	61%
Drove	74%	72%
Nights spent	6.0	6.2
Direct expenditures (travel party for entire trip)	\$4,566	\$4,060
1 st time visitor	14%	14%
10+ visits to Walton County	37%	38%

VISITOR PROFILE - SPRING 2023 VS. 2024

Top Origin States	Spring 2023	Spring 2024
Georgia	16%	15%
Tennessee	14%	13%
Texas	11%	11%
Alabama	10%	10%
Mississippi	5%	8%

Origins - Regions	Spring 2023	Spring 2024
Southeast	67%	68%
Midwest	19%	20%
Florida	5%	5%
Northeast	3%	3%
West	5%	3%
International	1%	1%

VISITOR PROFILE – SPRING 2023 VS. 2024

Top Visitor Activities	Spring 2023	Spring 2024
Beach	96%	95%
Restaurants	93%	92%
Relax and unwind	85%	84%
Shopping	72%	74%
Family time, reading, cooking	69%	68%
Biking, running	53%	55%
Water sports	25%	29%
Golf or tennis	26%	27%
Bars, nightclubs	25%	25%
Special events	24%	23%
Hiking, nature walks, eco tours	20%	19%
Attractions	14%	18%
State parks	16%	14%
Dune lakes	11%	9%
Art galleries, museums, cultural events	8%	8%
Spas	7%	8%
Business meetings, conferences	1%	5%
Other	3%	3%

VISITOR PROFILE – SPRING 2023 VS. 2024

Visitor Metrics	Spring 2023	Spring 2024
Will return to Walton County	94%	94%
Rating for overall experience ¹	9.2	9.1
Viewed Visitors Guide ²	19%	18%
Planned trip 6+ months out	24%	22%
Used VisitSouthWalton.com	12%	11%
Used 1 of 16 beaches' websites	16%	15%
Use the term "South Walton"	12%	11%

DETAILED FINDINGS



VISITOR JOURNEY: PRE-VISIT

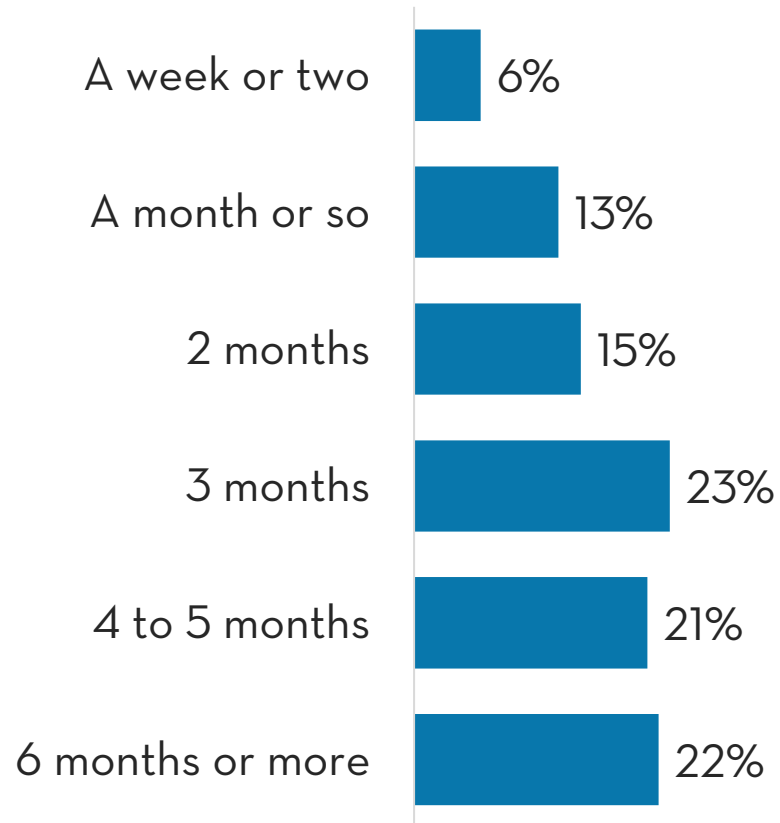


PLANNING CYCLE


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

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


Average trip planning cycle began **99 days** before the trip (**98 days** in 2023)



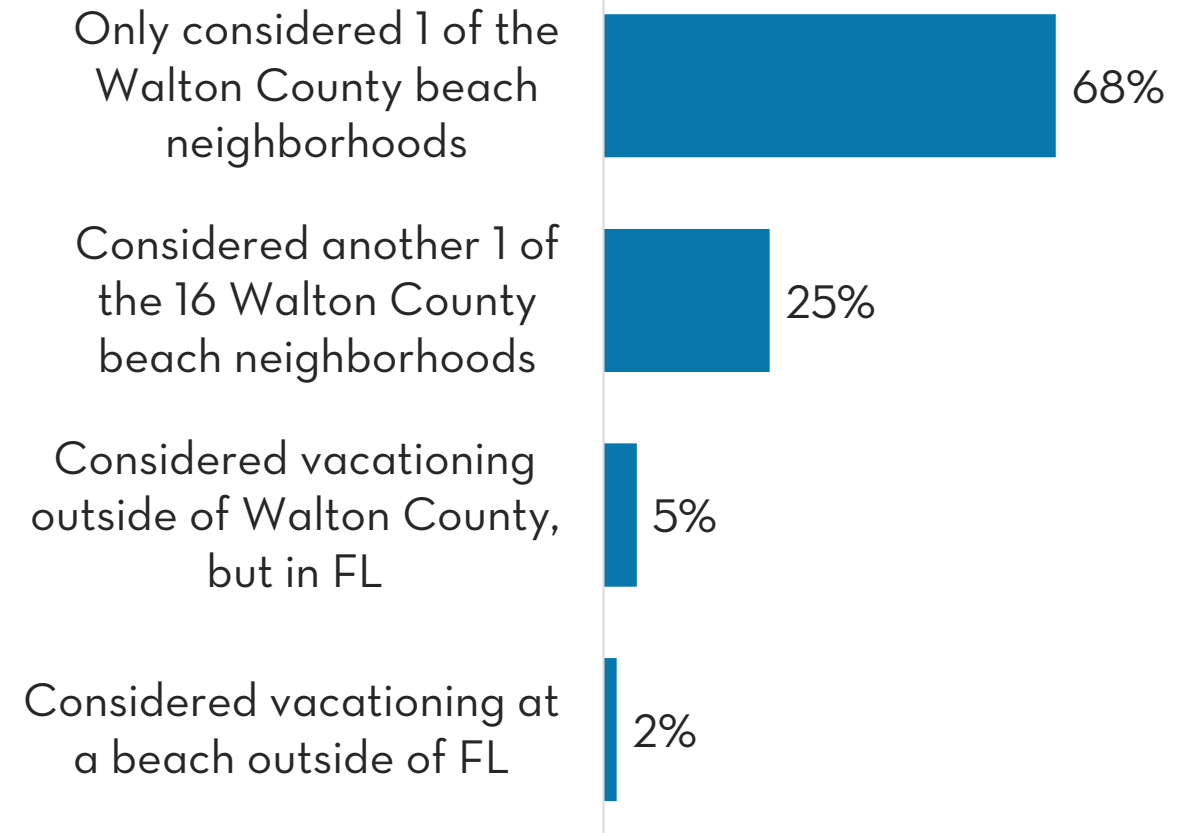
OTHER DESTINATIONS CONSIDERED



Over 2 in 3 (+5% points from 2023) Spring visitors only considered going to the Walton County beach neighborhood where they stayed



11% use the term “South Walton” when referring to the area. Loyal visitors are more likely to refer to the destination as “South Walton” than first-time visitors.

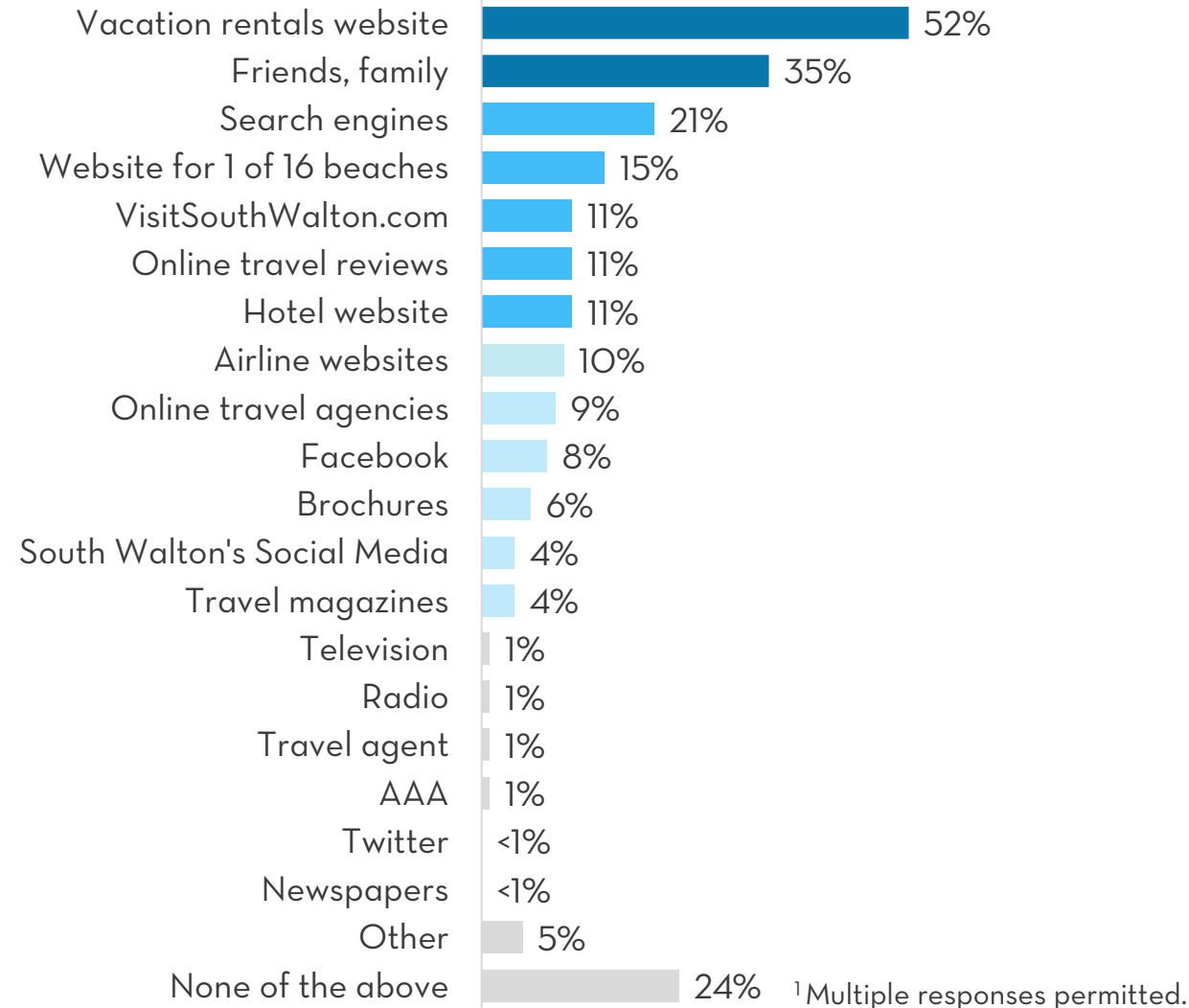


TRIP PLANNING SOURCES¹

52% of visitors used a vacation rental website to help plan their trip to Walton County

Over 1 in 3 visitors asked their friends and family for advice to help plan their trip to Walton County

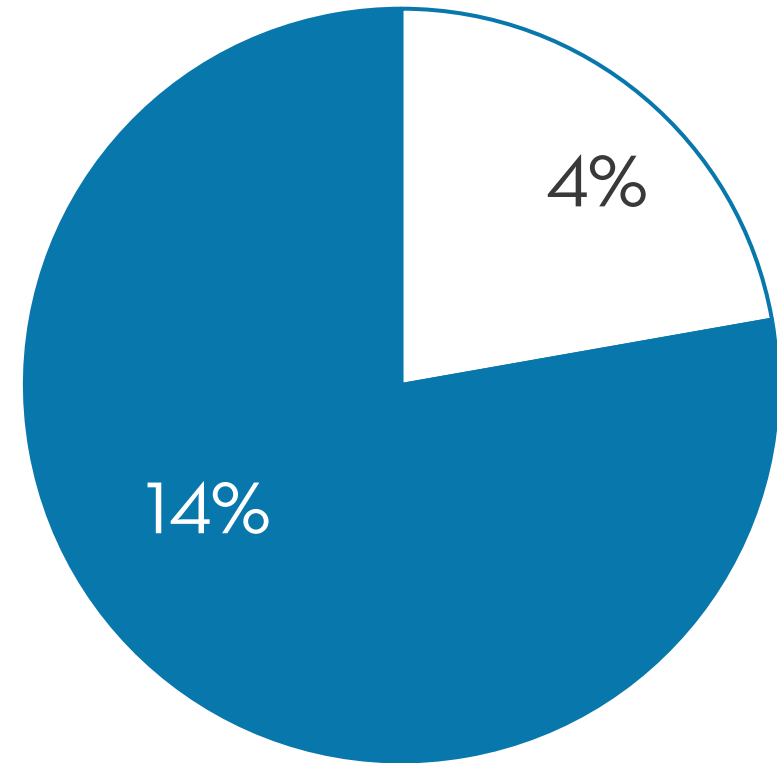
Over 1 in 5 visitors used search engines such as Google to help plan their trip to Walton County



WALTON COUNTY VISITOR GUIDE

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

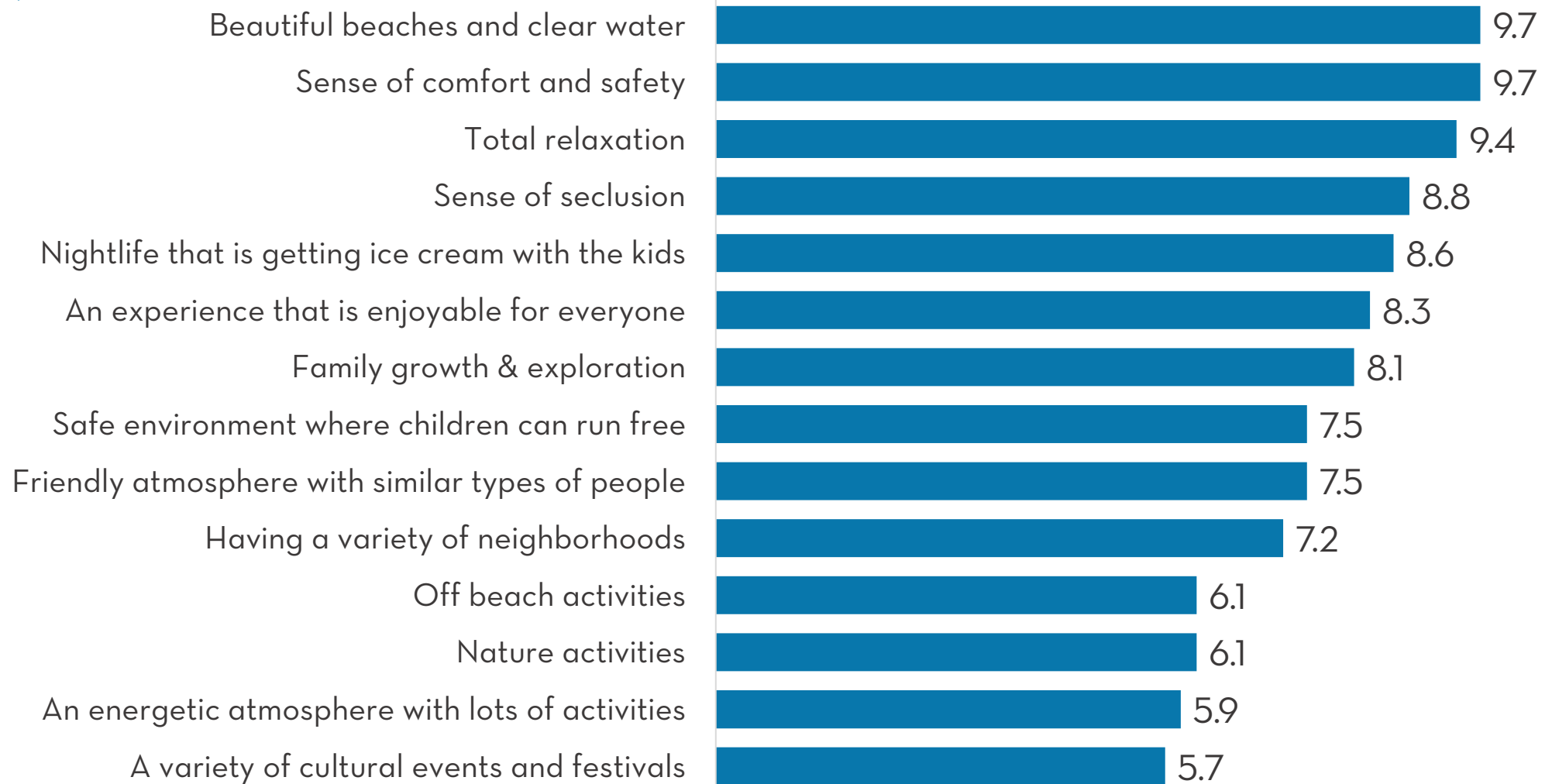
Visitors Guide received a rating of **8.6 out of 10¹** (+0.1 points from 2023)



□ Print version ■ Online version

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

IMPORTANT VACATION DESTINATION ATTRIBUTES¹

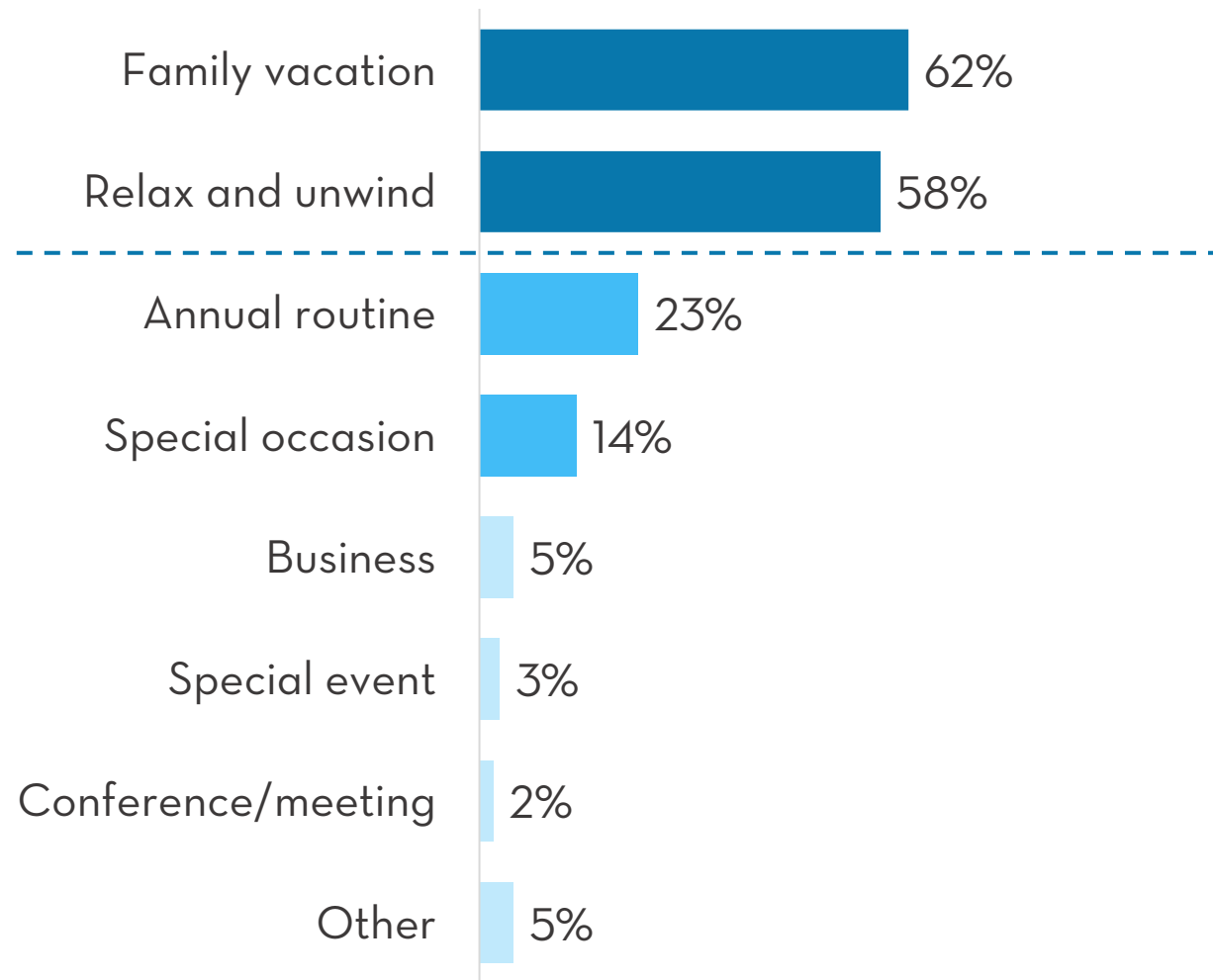


¹Rated on a scale from 1 to 10 where 10 is very important and 1 is not at all important.

REASONS FOR VISITING¹

Over 3 in 5 visitors visited Walton County for a **family vacation** to **relax and unwind**

Nearly 3 in 5 Spring visitors came to **relax and unwind**



¹Multiple responses permitted.

WALTON COUNTY PROMOTIONS¹



30% (consistent with 2023) of Spring visitors recalled advertising, promotions, or travel stories for Walton County

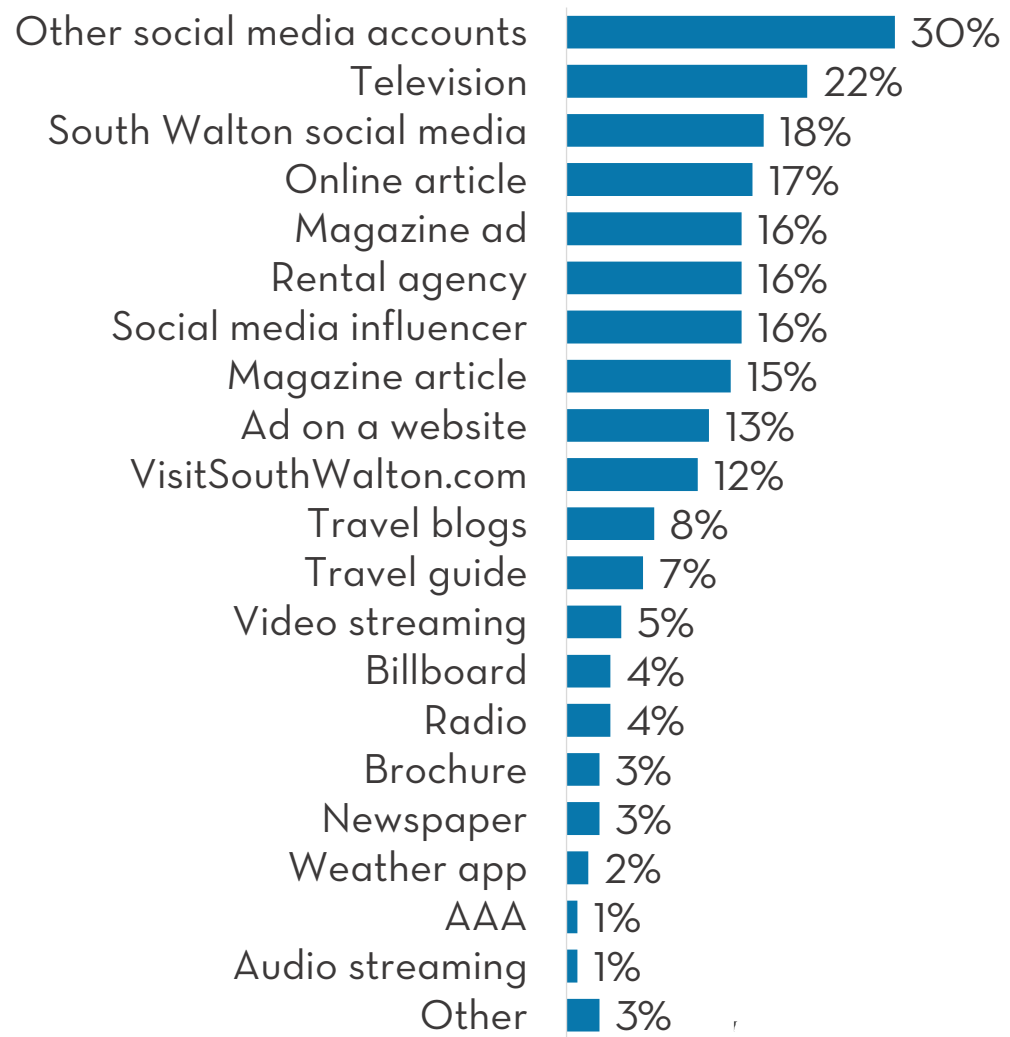


This information influenced **7%** (consistent with 2023) of all visitors to visit Walton County



30% (+2% points from 2023) Spring visitors recalled information about the destination on **other² social media accounts**

Base: **30%** of visitors who recalled advertising



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

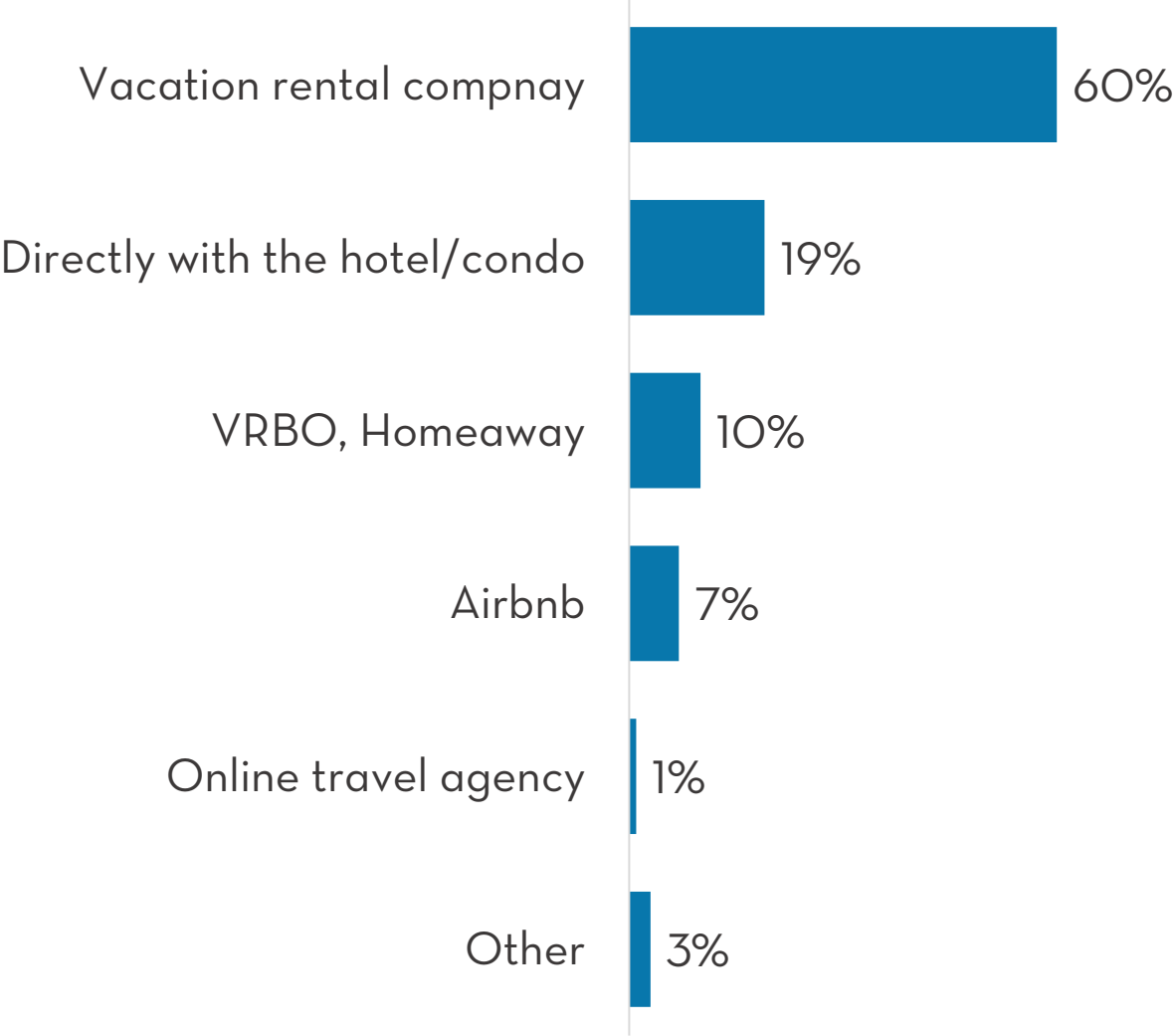
BOOKING ACCOMMODATIONS



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




Nearly 1 in 5 Spring visitors booked **directly with a hotel or condo**



VISITOR TRANSPORTATION

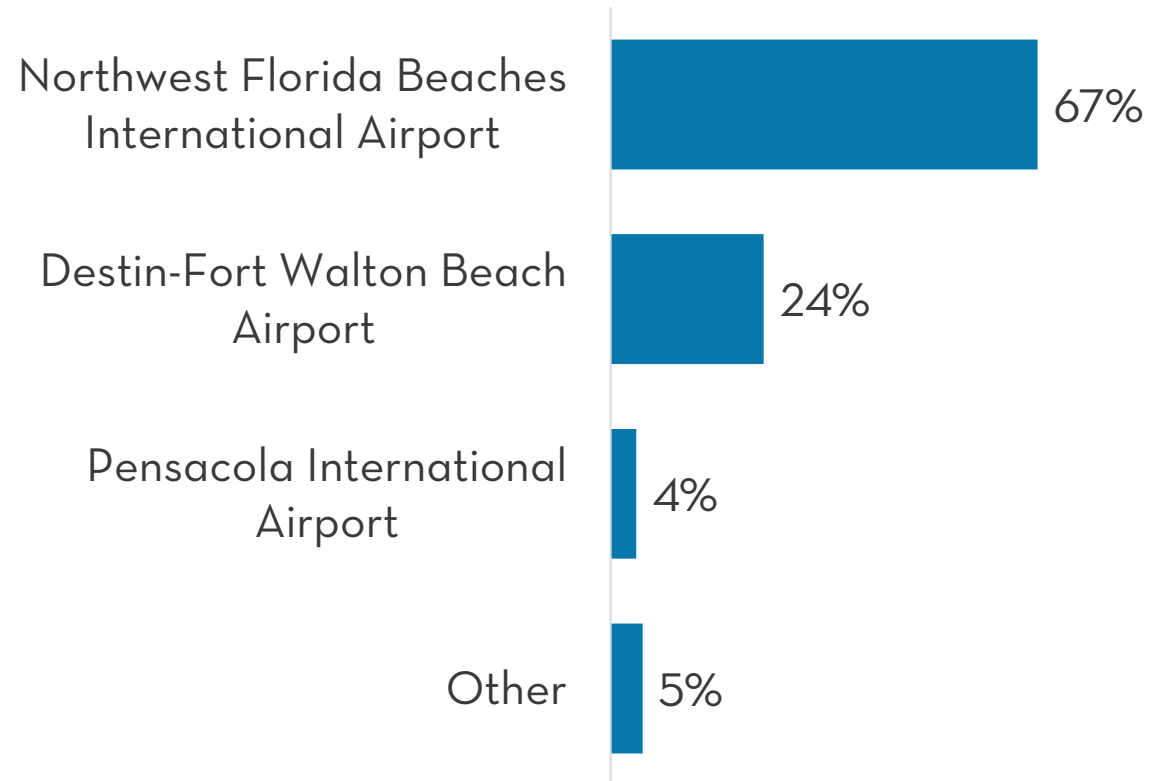


72% (-2% points from 2023) of Spring visitors drove to Walton County



32% (-5% points from 2023) of those who drove were aware that there were direct flights from their city to the Walton County area, and **23%** were not sure if there were direct flights available

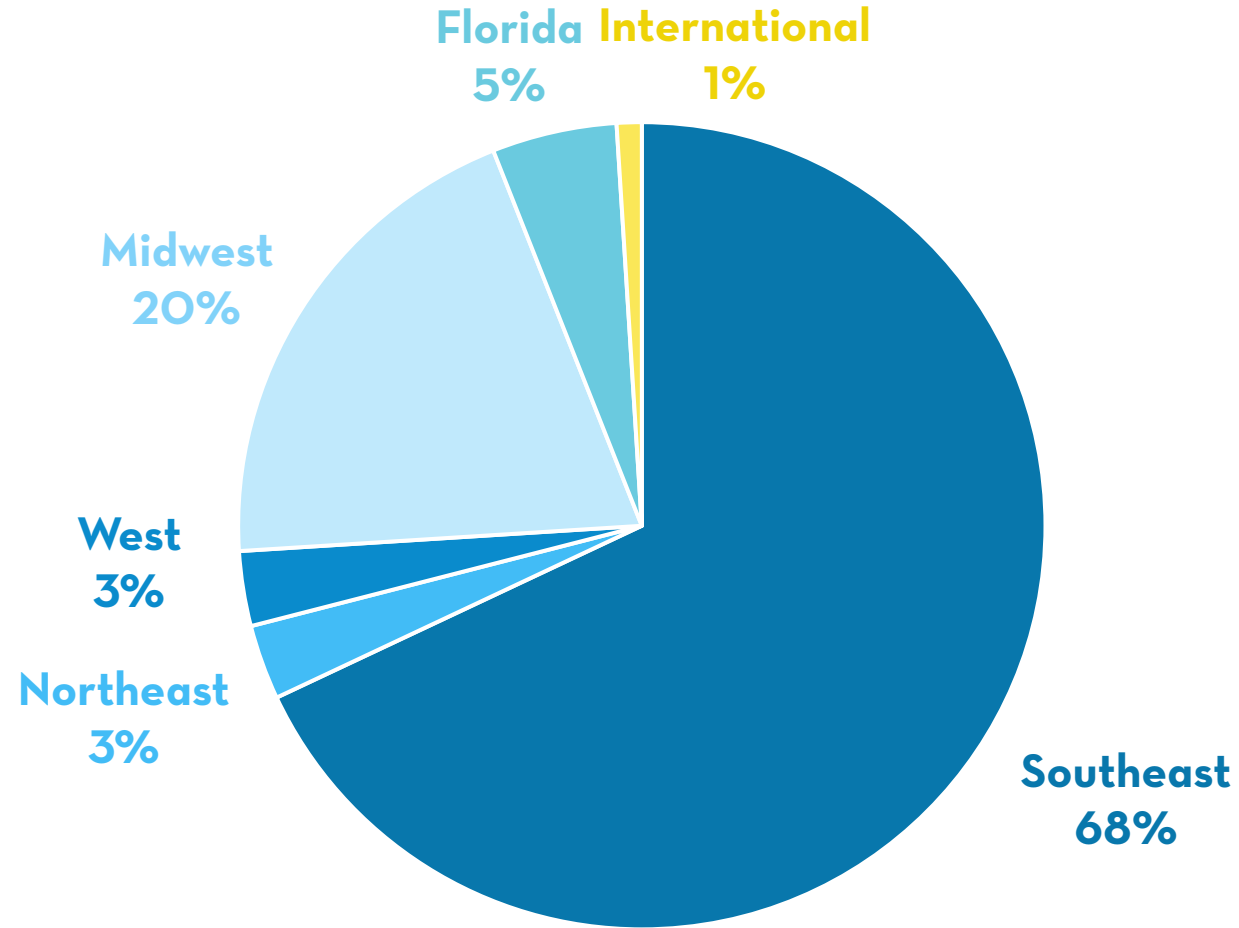
26% who **flew** used the following airports:



VISITOR JOURNEY: TRAVEL PARTY PROFILE

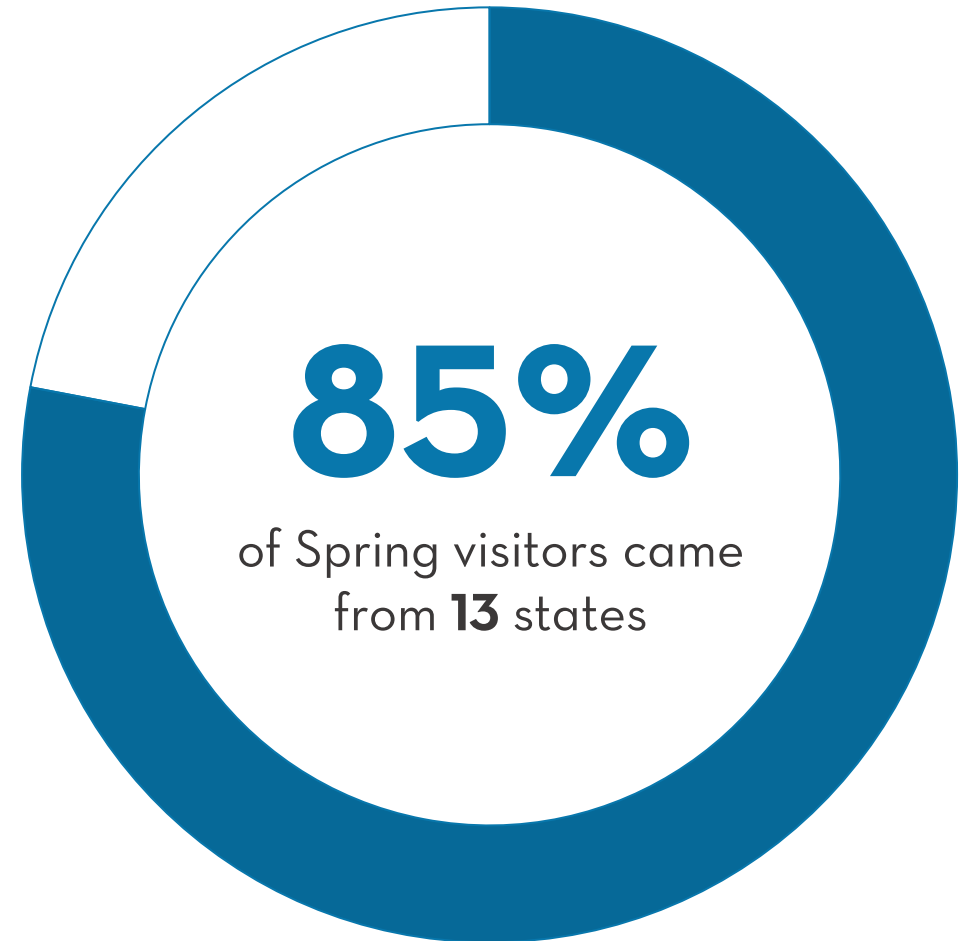


ORIGIN OF SPRING VISITORS




ORIGIN OF SPRING VISITORS


State	% of Visitors
Georgia	15%
Tennessee	13%
Texas	11%
Alabama	10%
Mississippi	8%
Florida	5%
Louisiana	5%
Arkansas	3%
Illinois	3%
Indiana	3%
Kentucky	3%
Missouri	3%
Ohio	3%



ORIGIN OF SPRING VISITORS



13% (-1% points from 2023) of all visitors came from the **Atlanta** market



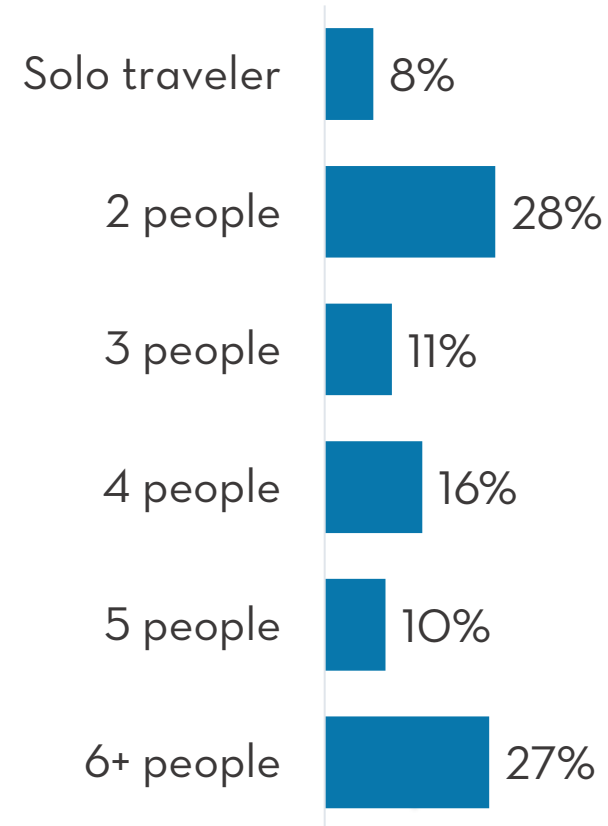
10% (+1% points from 2023) visitors are from the **Nashville** market

Top Origin Markets	% of Visitors
Atlanta	13%
Nashville	10%
Birmingham	4%
Columbus-Tupelo-West Point	4%
Houston	4%
New Orleans	4%
Dallas-Fort Worth	4%
Memphis	3%
Mobile-Pensacola	3%
Chicago	2%
Austin	2%
Saint Louis	2%
Little Rock-Pine Bluff	2%
Louisville	2%
Montgomery	2%

TRAVEL PARTY SIZE AND COMPOSITION

Visitors traveled in a party composed of **4.5** people (5.0 people in 2023)

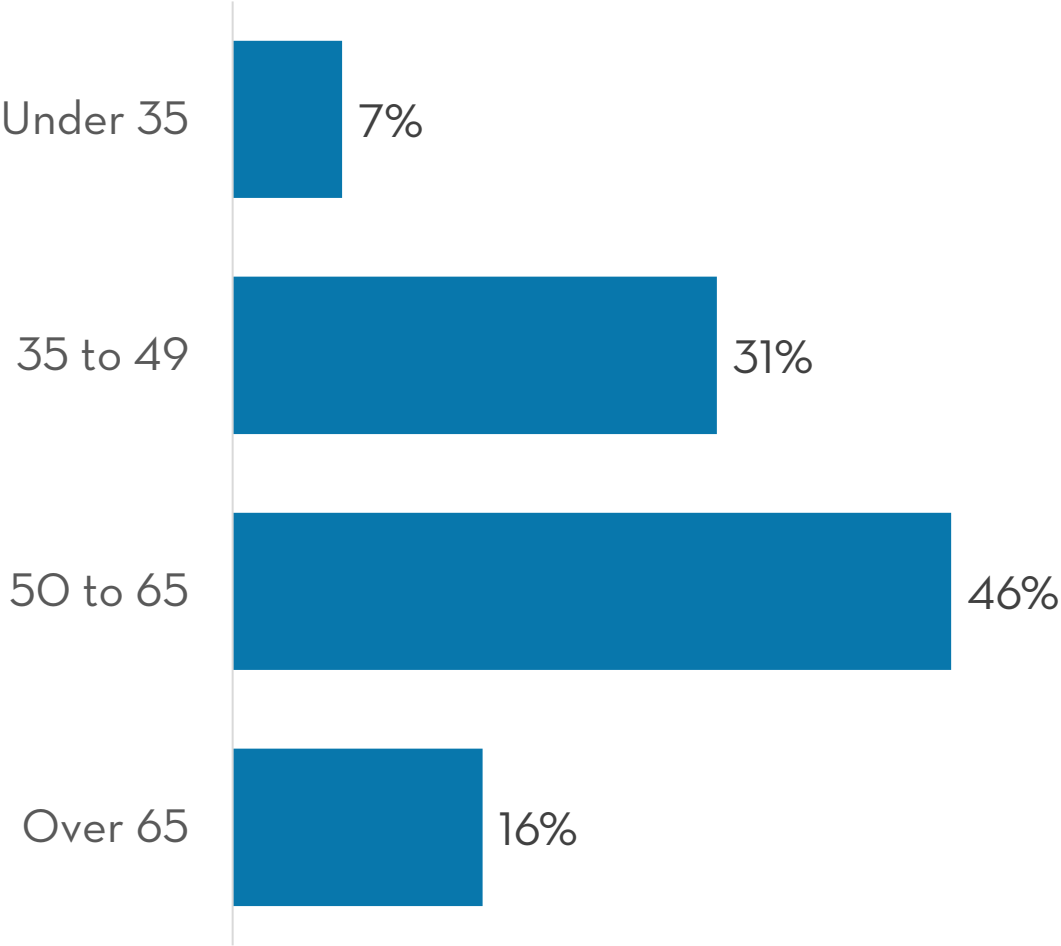
50% of visitors traveled with children under the age of 20




AGE OF SPRING VISITORS



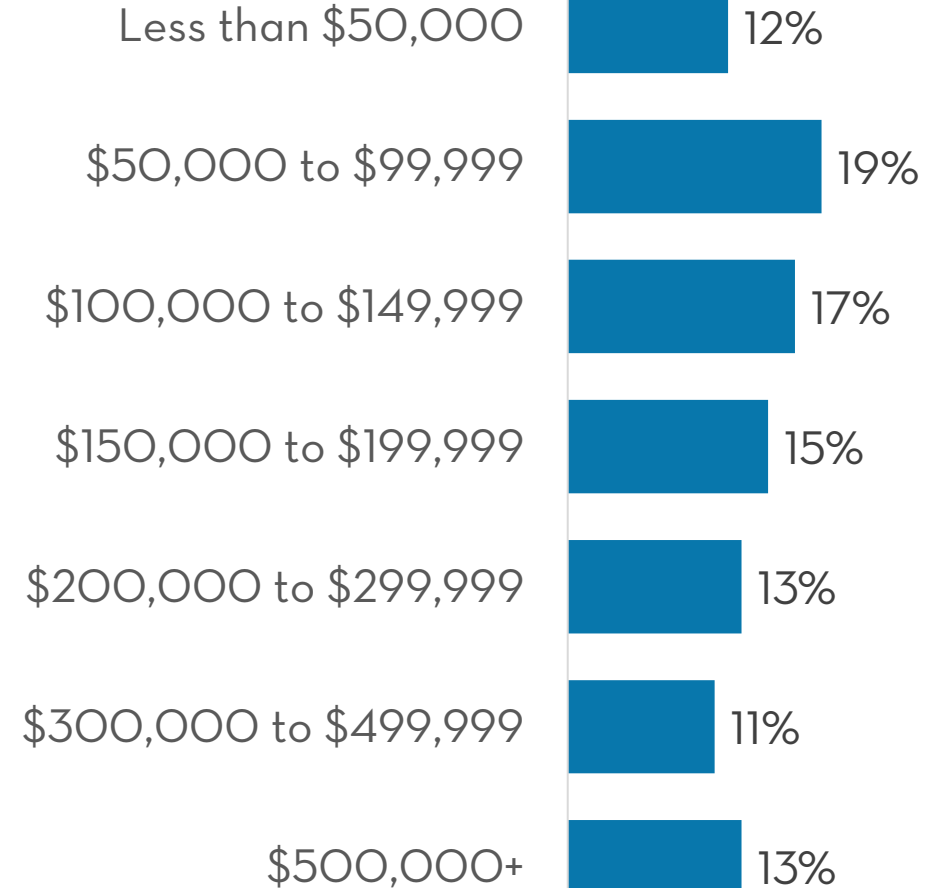
Median age of Spring visitors was **54 years old** (54 years old in 2023)



TOTAL HOUSEHOLD INCOME IN 2023



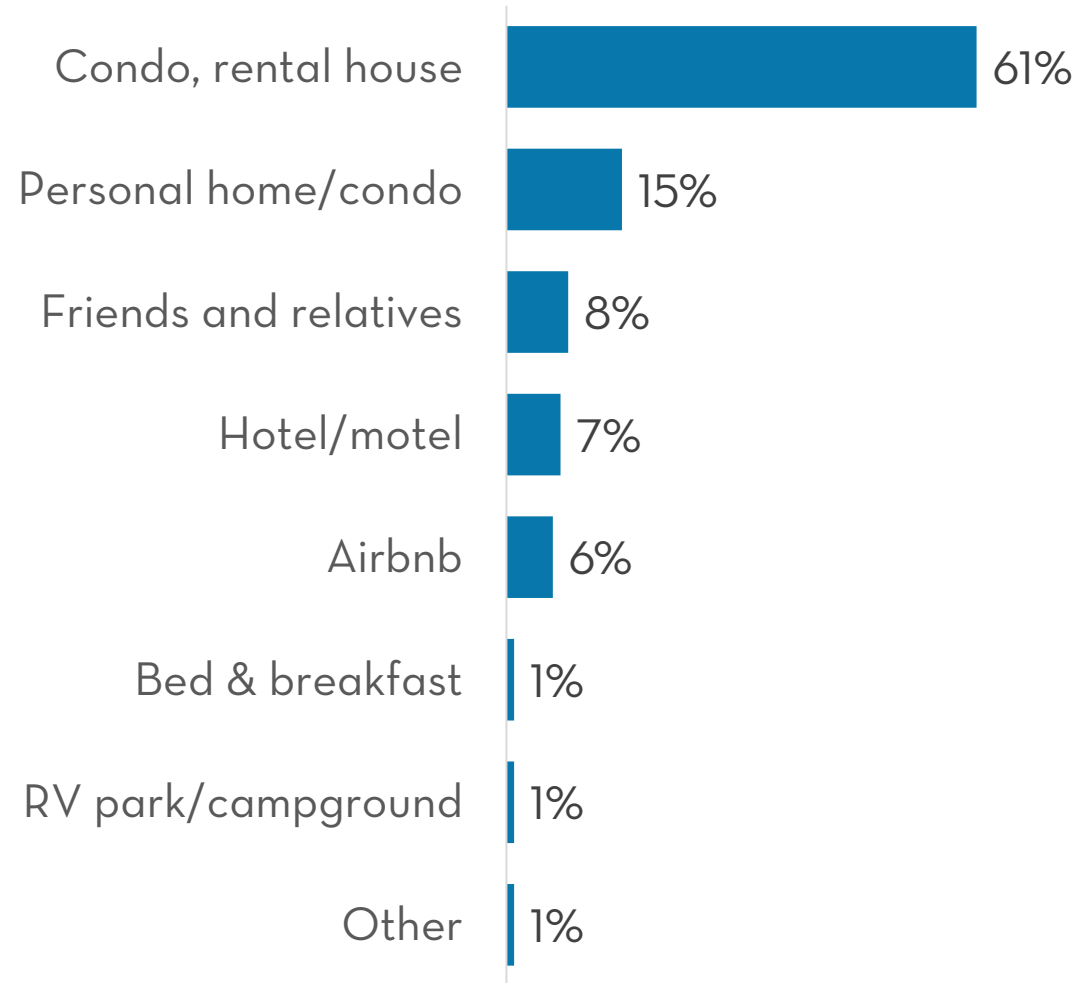
Spring visitors had a **median** household income of **\$156,700** (\$166,700 in 2023), while estimated **average** household income was **\$209,300** (\$214,800 in 2023)



VISITOR JOURNEY: TRIP EXPERIENCE



VISITOR ACCOMMODATIONS



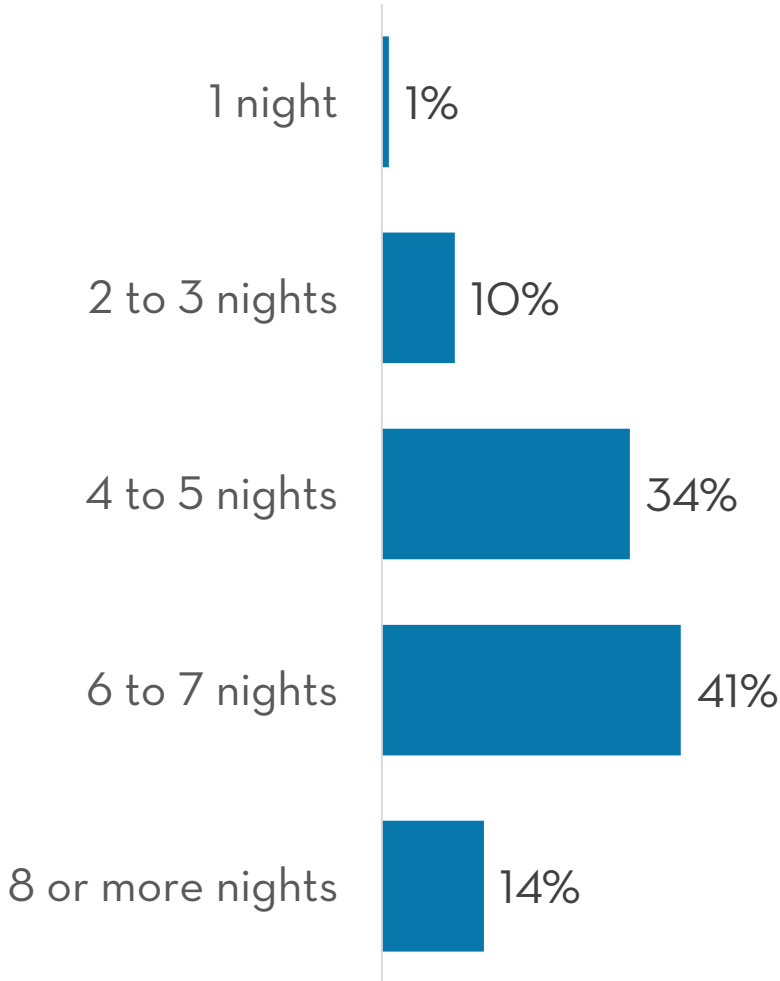
LENGTH OF STAY



Spring visitors¹ spent an average of **6.2** nights² in Walton County (6.0 nights in 2023)



Spring visitors staying in paid accommodations spent an average of **6.2** nights² in Walton County



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

14% of Spring visitors were visiting for the first time

38% of Spring visitors have visited Walton County more than 10 times

That was my first time

14%

2 - 3

16%

4 - 5

15%

6 - 10

17%

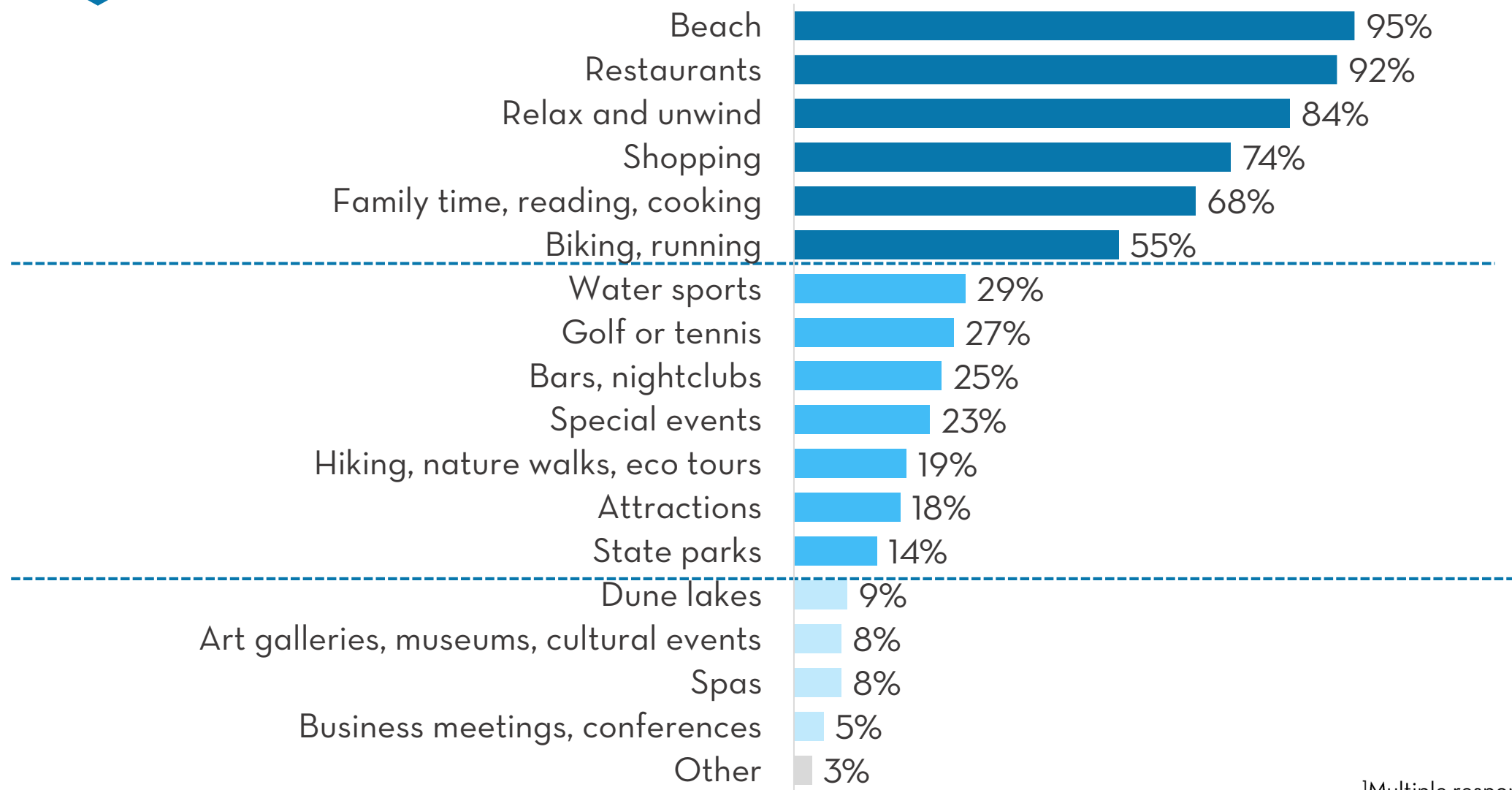
11 - 20

17%

21+

21%

VISITOR ACTIVITIES¹

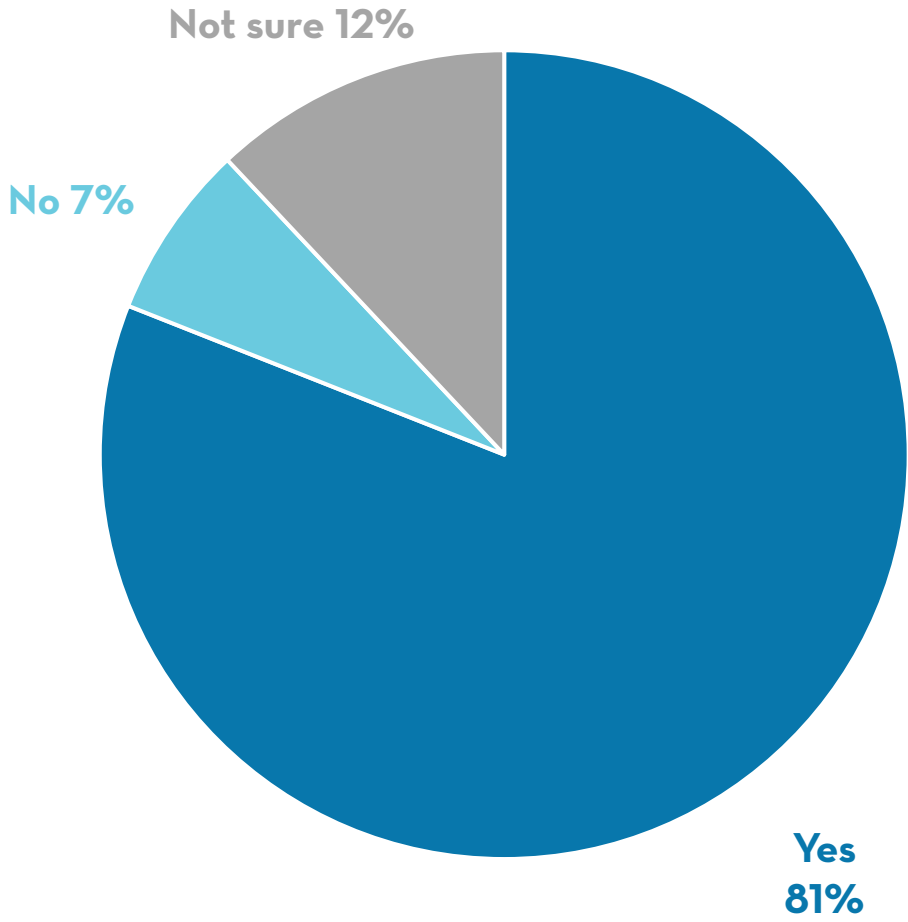


¹Multiple responses permitted.

BEACH SAFETY



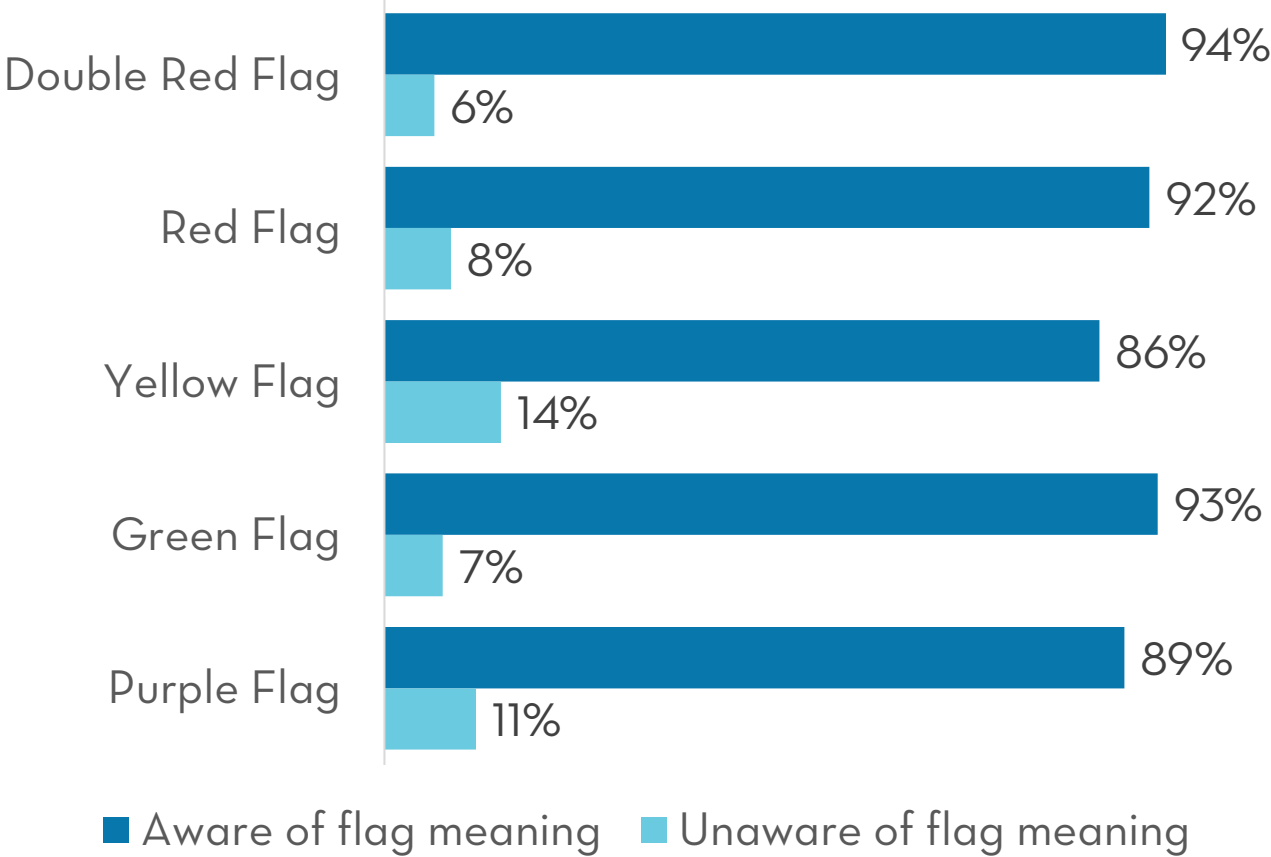
81% of Spring visitors know there are flags posted along the beaches to indicate how safe it is to go into the water



BEACH FLAG AWARENESS

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

67% (+6% points from 2023) 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

Spending Category ¹	Average Daily Expenditure	Total Trip Expenditure
Accommodations	\$228	\$1,410
Restaurants	\$154	\$950
Groceries	\$60	\$370
Shopping	\$107	\$660
Entertainment	\$40	\$250
Transportation	\$51	\$320
Other	\$16	\$100
Total	\$656	\$4,060

¹ Includes overnight visitors and day trippers.

VISITOR JOURNEY: POST-TRIP EVALUATION



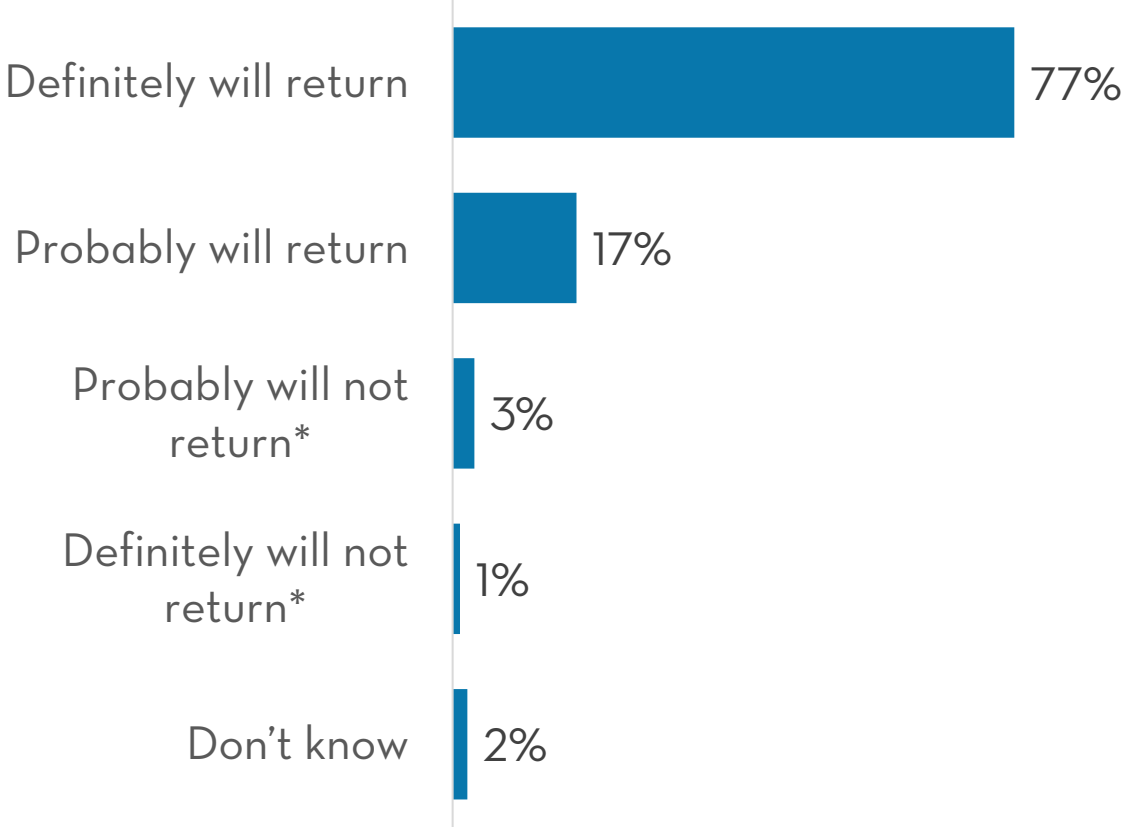
SATISFACTION WITH WALTON COUNTY



Visitors gave Walton County a rating¹ of **9.1** (-0.1 points from 2023) as a place to vacation



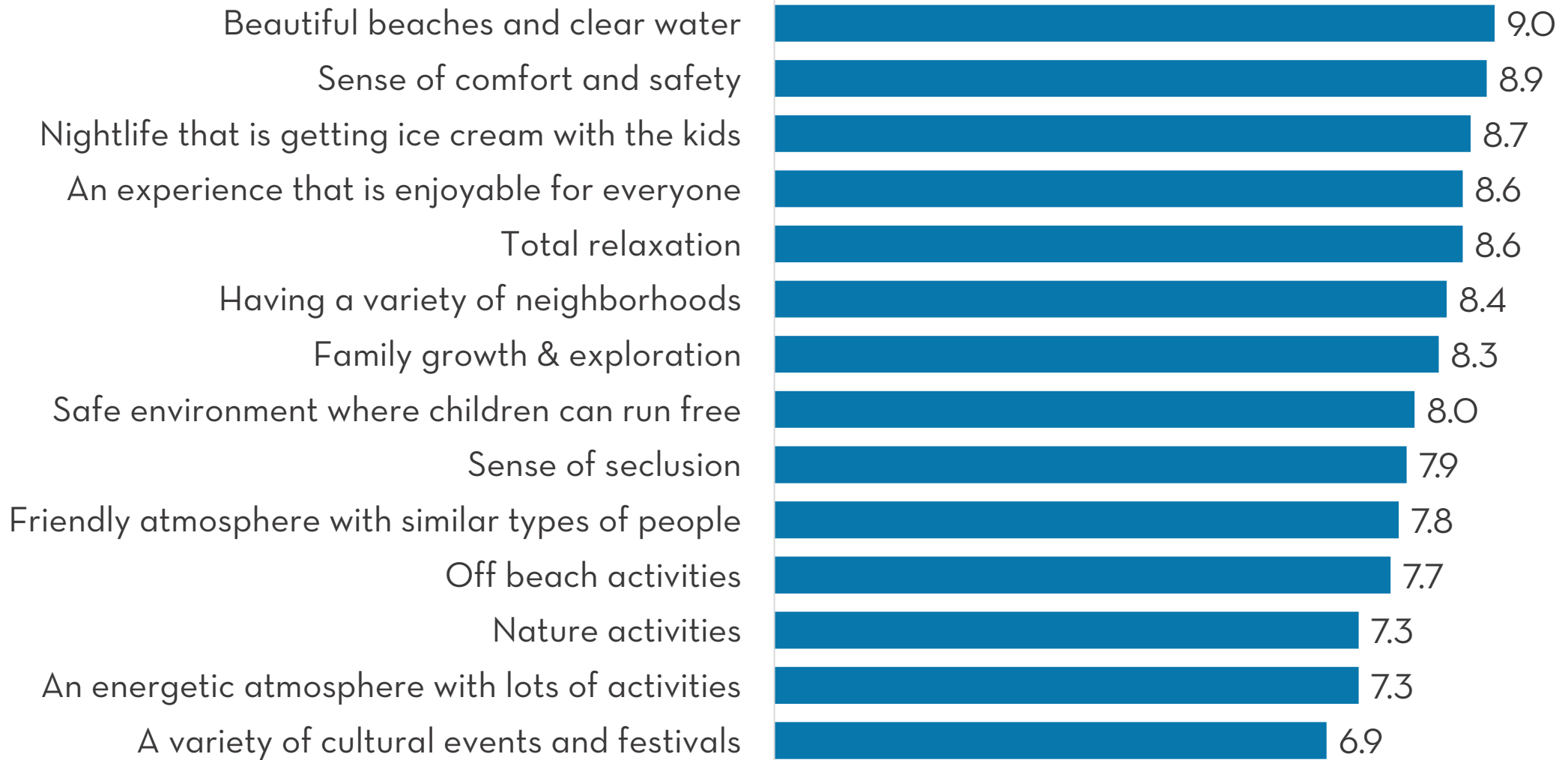
Nearly 4 in 5 Spring visitors will definitely return to Walton County



¹10 = Excellent; 1= Poor

*4% of all visitors will not return to Walton County for the following reasons:
1. Too crowded 2. Parking was a problem 3. Traffic was a problem

RATING WALTON COUNTY¹



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

AREA DESCRIPTIONS



"Picturesque, beautiful beaches, safe."

"A pristine oasis. It is the perfect beach vacation with family and friends here in the US."

"Soft white beaches with clear blue water in a family friendly environment with lots of walking and biking paths."

"White sand beaches, emerald color water, good restaurants, something for everyone."

"Beautiful white sand beaches, clear water. Family friendly atmosphere. Seaside area is completely walkable."

"Most beautiful beaches in America."

AREA DESCRIPTIONS



“Beautiful beaches and communities where kids are entertained, and parents have fun things to do as well.”

“Peaceful, lots of fun activities to do for not only couples, but also families. Safe environment.”

“Beaches are the most beautiful anywhere. Seaside area is quaint, cozy, peaceful and secure! Pet friendly.”

“Beautiful area with various different environments. Great place for a family gathering to spend time together.”

“Family friendly, safe, reliable, fun for all interests, great food.”

“Beautiful ocean and beaches, wonderful charming architecture, fun shops & restaurants in a relaxed but fun and safe atmosphere.”

AREA DESCRIPTIONS



"Definitely a lovely area to visit!"

"Upscale relaxation in nature."

"Quiet relaxing vacation with most everything we needed within walking distance. Great restaurants!"

"The best area of Florida."

"Many opportunities to do as much or as little as you'd like. A great variety of restaurants and shopping."

"Felt like a European vacation. Different than other parts of Florida. Very charming and friendly."

"Classic - the way America should be."

FEELINGS ASSOCIATED WITH WALTON COUNTY



"It feels very safe, and the beaches are amazing."

"It makes me happy to come visit my parents, so it's special to me."

"We have a blast every time we come."

"Glam!"

"Very safe, clean environment, very family-friendly."

"Ideal for families, amazing vibes, amazing beach, European feel."

"Pure joy!!"

"Breathtaking beauty."

WALTON COUNTY TOURISM

Spring 2024 Visitor Tracking Study March - May 2024

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