

WALTON COUNTY TOURISM

Spring 2025 Visitor Tracking Study
March - May 2025



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Visitor Tracking Study

This report is based on 851 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 2025.

ECONOMIC IMPACT SUMMARY



TOURISM SNAPSHOT: KEY PERFORMANCE INDICATORS



1,303,900

TOTAL VISITORS

vs. 2024

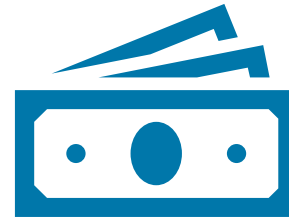
↓ 2.1%



1,011,100

ROOM NIGHTS

↓ 1.7%



\$1,145,805,400

DIRECT SPENDING

↓ 1.0%



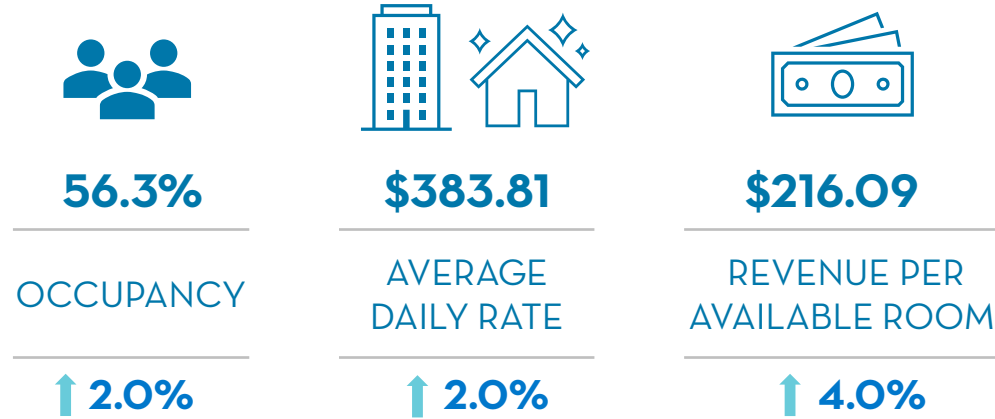
\$17,391,562

TOURISM DEVELOPMENT TAX

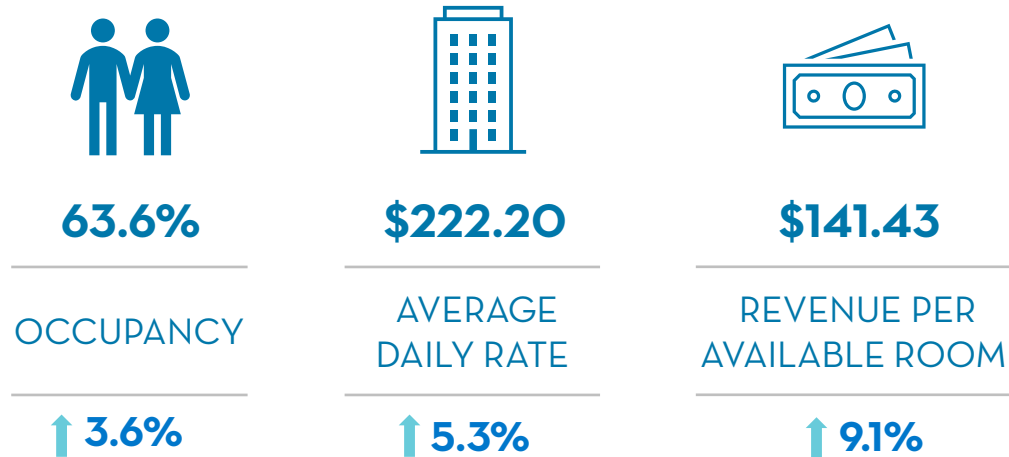
↑ 3.5%

TOURISM SNAPSHOT: LODGING METRICS

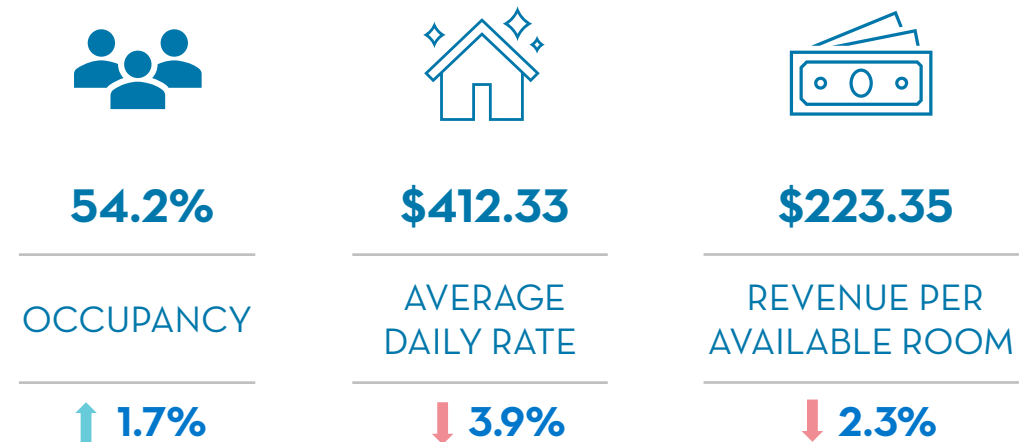
COMBINED



HOTELS¹



VACATION RENTALS²



¹ Source: Smith Travel Research.

² Source: Key Data.

SPECIAL ATTRIBUTES OF THE SPRING SEASON

Insights:

- » Spring consistently contributes over one-quarter of annual visitors, making it a core visitation season.
- » Despite having the lowest spend per visitor per day, Spring attracts the highest median income travelers.
- » Because of the high volume and lower spend per visitor there is an opportunity to encourage more spending. Even small increases in travel party spending can produce a large impact of total economic return.

Recommendations:

- » Encourage extended stays and midweek travel through targeted offers and lodging promotions.
- » Promote experience bundling (e.g., beach + eco-tour, dining + event) to boost average spend per party.
- » Treat Spring as a workhorse season and continue investing in broad-market brand awareness—especially in drive markets like Georgia, Tennessee, and Alabama.

Visitor Metrics	Typical Spring Visitor ¹	Typical Visitor ¹
Spend per visitor	\$887	\$916
Length of stay	6.1	5.9
Spend per visitor per day	\$145	\$156
Average Age	54	53
Median Income	\$167,600	\$156,300

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

VISITOR PROFILE SUMMARY



SPRING 2025 VISITOR PROFILE



53

Median Age

15%

First-time Visitor

\$165,400

Median Household Income

54%

Traveled with Children

4.7

Travel Party Size

6.3

Length of Stay

WALTON COUNTY PROMOTIONS¹

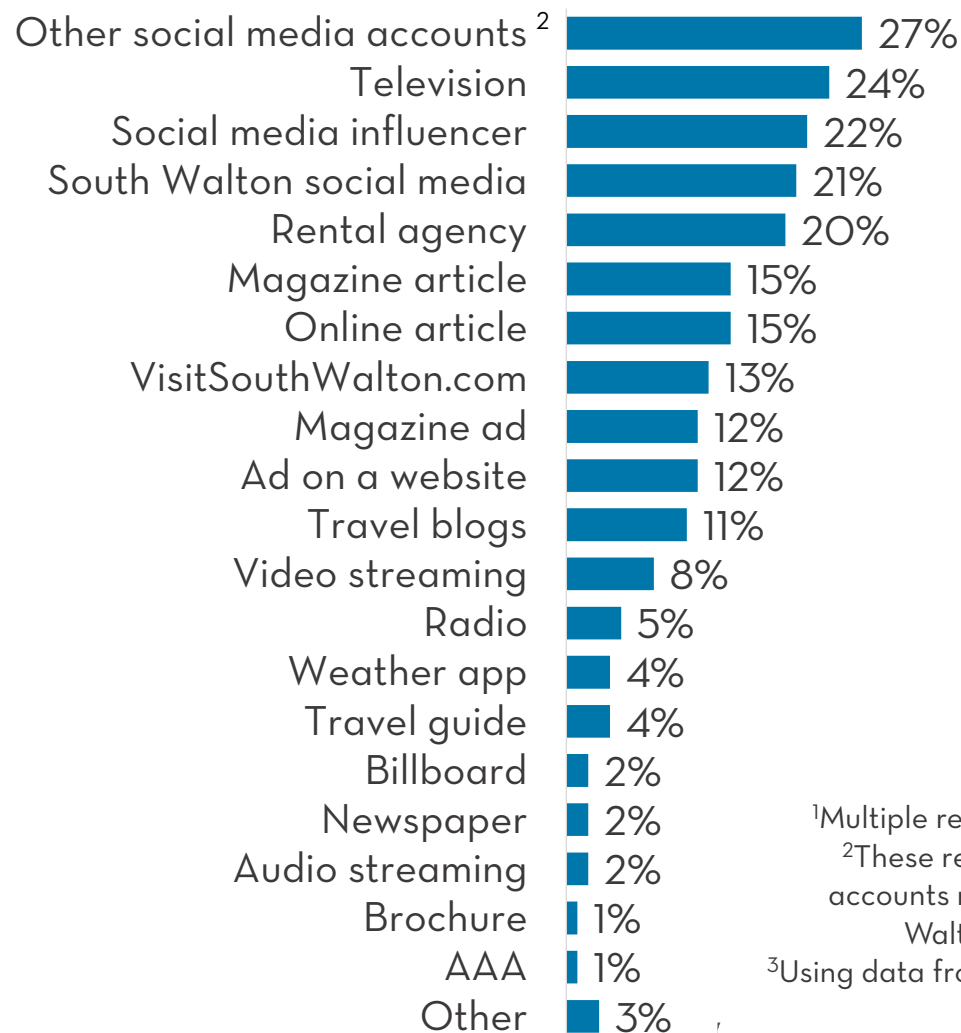
Insights:

- » The number of visitors that saw information for South Walton from social media influencers increased 6% points compared to Spring 2024.
- » The percentage of visitors who saw advertising who reported being influenced by that information increased 7% points year-over-year (+2% points increase in overall visitors).
- » Spring ad recall is typically slightly higher than other seasons³

Recommendations:

- » Maintain Spring as a media-heavy season, leveraging both traditional formats and high-performing influencer partnerships.
- » Prioritize creative that tells a story and evokes emotions.
- » Reinforce Spring's family-friendly and relaxing tone across all ad platforms.

Base: **29%** of visitors who recall advertising



¹Multiple responses permitted.

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

³Using data from December 2021 to May 2025

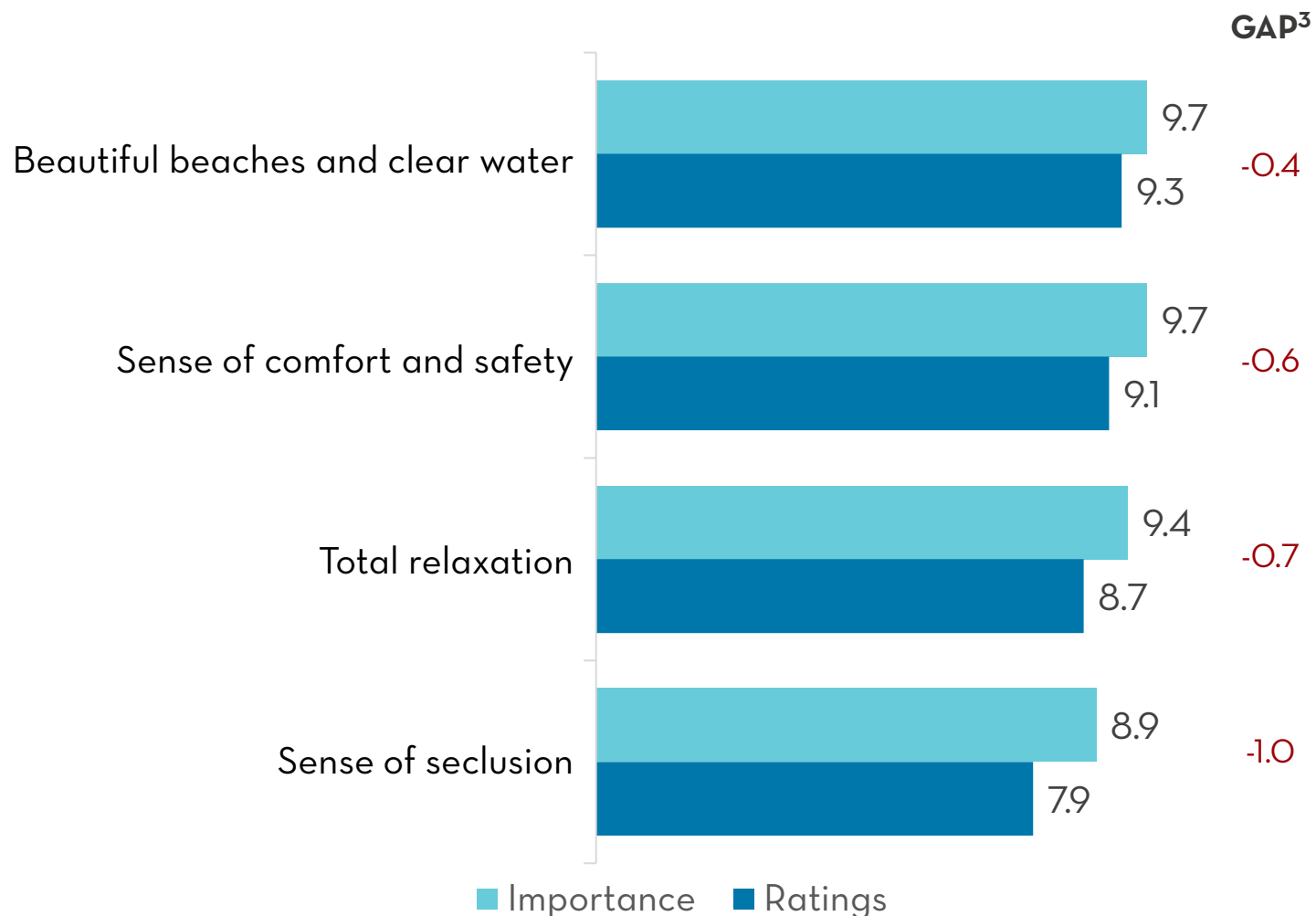
VACATION ATTRIBUTE IMPORTANCE¹ VS. RATINGS²

Insight:

- » A “sense of seclusion” garnered the largest difference between importance to visitors and the rating they gave Walton County.

Recommendations:

- » Spring is ideal for positioning Walton County as a goldilocks season: not as crowded as summer, warmer than winter.
- » Develop content or itineraries around secluded escapes—ideal for families, couples, or retirees avoiding crowds.



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 9.3 on its beaches. Hence, the GAP is -0.4.

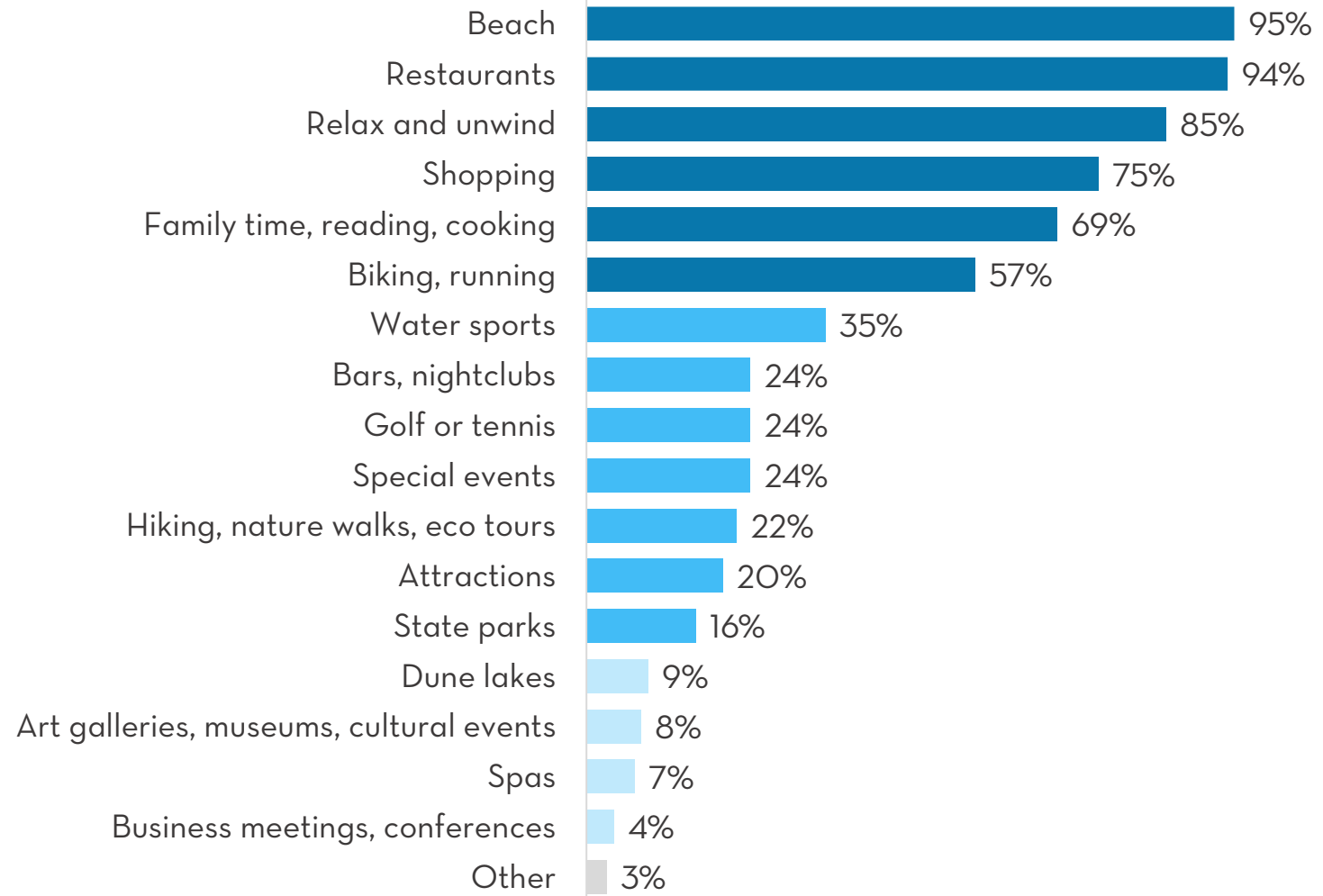
VISITOR ACTIVITIES¹

Insights:

- » Activities such as going to the beach, relaxing & unwinding, family time, and hiking, nature walks, & eco-tours, consistently garner a higher percentage of visitors in Spring than other seasons.²
- » Spring's activity profile reflects both good weather and a high share of family travelers.

Recommendations:

- » Promote personal experiences from visitors showcasing popular Spring activities.
- » Center Spring messaging around beach imagery, family bonding, and restorative relaxation.



TRAVEL PARTIES

Insights:

- » The share of visitors traveling with children increased 4 % points year-over-year.
- » Spring has a mixed audience with a high share of family travel, second only to Summer, but also hosts couples and has a higher average age than Summer.

Recommendations:

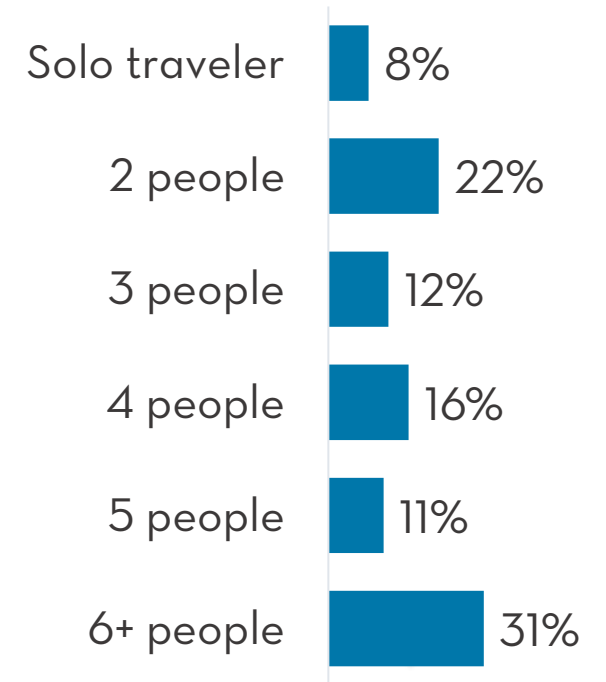
- » Anchor campaigns around families and multigenerational groups while still featuring quiet getaways.
- » Emphasize walkability, beach access, and family-friendly events in digital and social ads.



54%

TRAVEL WITH
CHILDREN

↑ 4% points



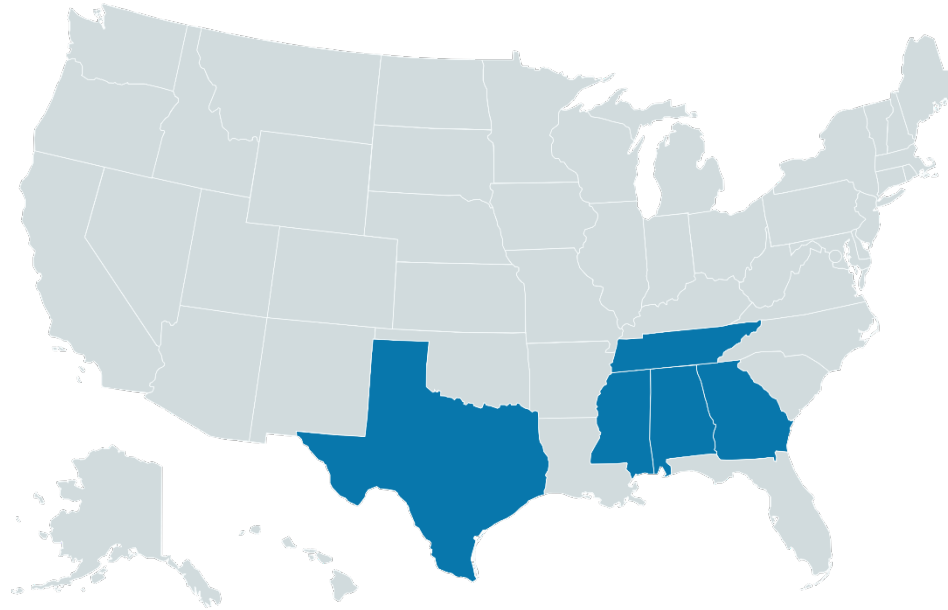
ORIGIN OF SPRING VISITORS

Insight:

- » Over half of Spring visitors are from Georgia, Tennessee, Texas, Alabama, or Mississippi.

Recommendation:

- » Continue targeting these core markets with drive-focused messaging, especially around school breaks.
- » Explore loyalty offers or geo-targeted digital ads to boost repeat visitation from these states.



56% of visitors are from 5 states

14% Georgia

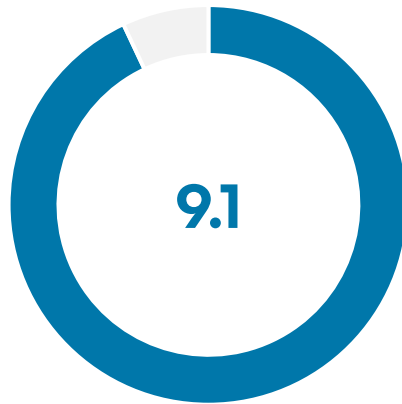
12% Tennessee

12% Texas

10% Alabama

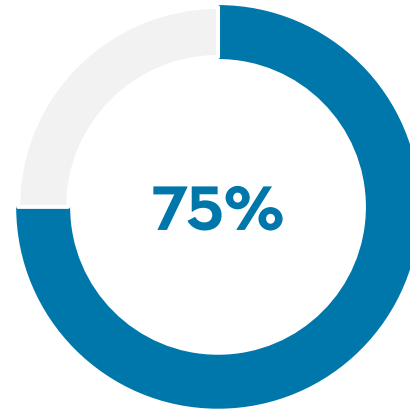
8% Mississippi

SATISFACTION STATISTICS



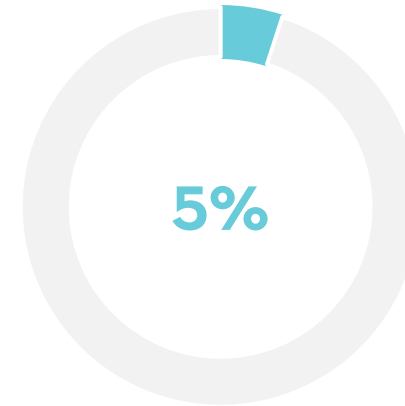
Highly Rated

Visitors gave Walton County a rating of 9.1 out of 10 (consistent with 2024) as a place to vacation



DEFINITELY RETURN

75% 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 crowded 2. Parking was a problem 3. Too expensive 4. Traffic was a problem

VISITOR DESCRIPTIONS OF WALTON COUNTY

"The Hamptons of the South. Too good to be true - the epitome of clean, safe, friendly, courteous, beautiful, and relaxing."



"A place where part of my soul lives and waits for my return."



"Picturesque. Like I was on a movie set. Just beautiful."



YEARLY COMPARISONS



VISITOR PROFILE - SPRING 2024 VS. 2025

Visitor Metrics	Spring 2024	Spring 2025
Travel party	4.5	4.7
Kids <20	50%	54%
Median age	54	53
Estimated median household income	\$156,700	\$165,400
Drove	72%	73%
Nights stayed¹	6.2	6.3
Direct expenditures (travel party for entire trip)	\$4,060	\$4,360
1st time visitor	14%	15%
Over 10 visits to Walton County	38%	37%

¹ Visitors staying 30 days or fewer.

VISITOR PROFILE - SPRING 2024 VS. 2025

Top Origin States	Spring 2024	Spring 2025
Georgia	15%	14%
Tennessee	13%	12%
Texas	11%	12%
Alabama	10%	10%
Mississippi	8%	8%

Origins - Regions	Spring 2024	Spring 2025
Southeast	68%	67%
Midwest	20%	22%
Florida	5%	4%
West	3%	4%
Northeast	3%	2%
International	1%	1%

VISITOR PROFILE - SPRING 2024 VS. 2025

Top Visitor Activities	Spring 2024	Spring 2025
Beach	95%	95%
Restaurants	92%	94%
Relax and unwind	84%	85%
Shopping, antiquing	74%	75%
Family time, reading, cooking	68%	69%
Biking, running	55%	57%
Water sports	29%	35%
Bars, nightclubs	25%	24%
Golf or tennis	27%	24%
Special events	23%	24%
Hiking, nature walks, eco tours	19%	22%
Attractions	18%	20%
State parks	14%	16%
Dune lakes	9%	9%
Art galleries, museums, cultural events	8%	8%
Spas	8%	7%
Business meetings, conferences	5%	4%
Other	3%	3%

VISITOR PROFILE - SPRING 2024 VS. 2025

Visitor Metrics	Spring 2024	Spring 2025
Will return to Walton County¹	94%	95%
Rating for overall experience²	9.1	9.1
Viewed Visitors Guide³	18%	24%
Planned trip 6+ months out	22%	21%
Used VisitSouthWalton.com	11%	12%
Used 1 of 16 beaches' websites	15%	15%
Use the term "South Walton"	11%	10%

¹ Includes "Definitely will return" and "Probably will return".

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

³ 19% used the online version & 5% 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 - SPRING 2025 VS. 2024

- » With over 1.3 million visitors this Spring, total visitor spending was over \$1.1 billion.
- » Increases in the number of visitors staying paid accommodations and ADR led to increases in occupancy, RevPAR, and TDT.
- » The total number of visitors decreased due to an increase in length of stay and decreases in the number of visitors staying with friends and family and the number of day trippers.
- » Occupancy increased while room nights decreased slightly due to a decrease in units available.
- » Direct spending and economic impact of tourism were down year over year due to decrease in the numbers of visitors staying with friends and family and the number of day trippers, as well as decreases in shopping and restaurant spending. This reflects national trends of visitors being more price conscious while in destination.

Visitor Metrics	Spring 2024	Spring 2025	% Δ
Room nights	1,028,400	1,011,100	-1.7%
Total visitors	1,331,700	1,303,900	-2.1%
TDT collections	\$16,803,580	\$17,391,562	+3.5%
Direct spending	\$1,157,388,200	\$1,145,805,400	-1.0%
Economic impact¹	\$1,689,786,800	\$1,638,501,700	-3.0%
Occupancy	55.2%	56.3%	+2.0%
Room rates	\$376.29	\$383.81	+2.0%
RevPAR	\$207.71	\$216.09	+4.0%

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 The economic impact multiplier for Walton County in 2025 is 1.43. In 2024 it was 1.46.

LODGING METRICS

56.3%

Occupancy

↑ 2.0%

\$383.31

ADR

↑ 2.0%

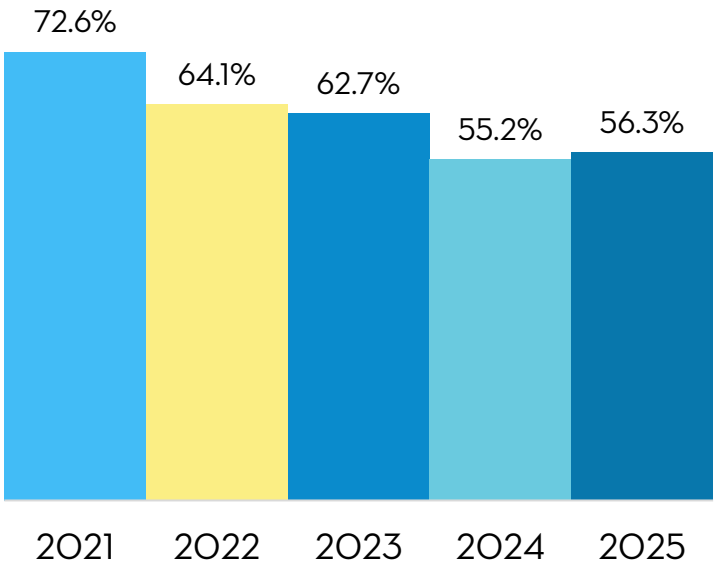
\$216.09

RevPAR

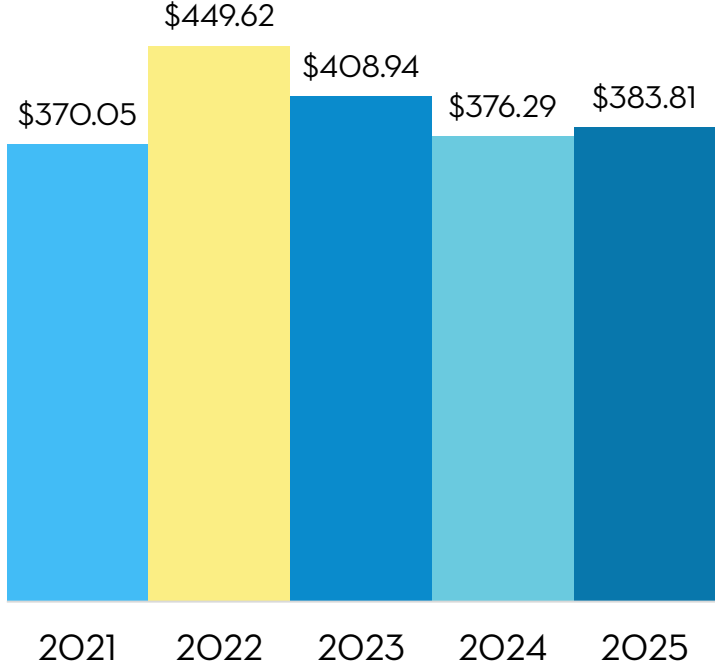
↑ 4.0%

5-YEAR OVERVIEW - SPRING LODGING METRICS

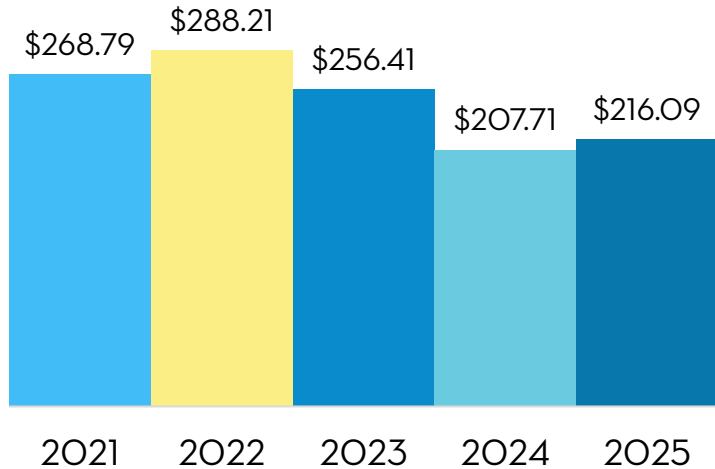
Occupancy Rate



Average Daily Rate

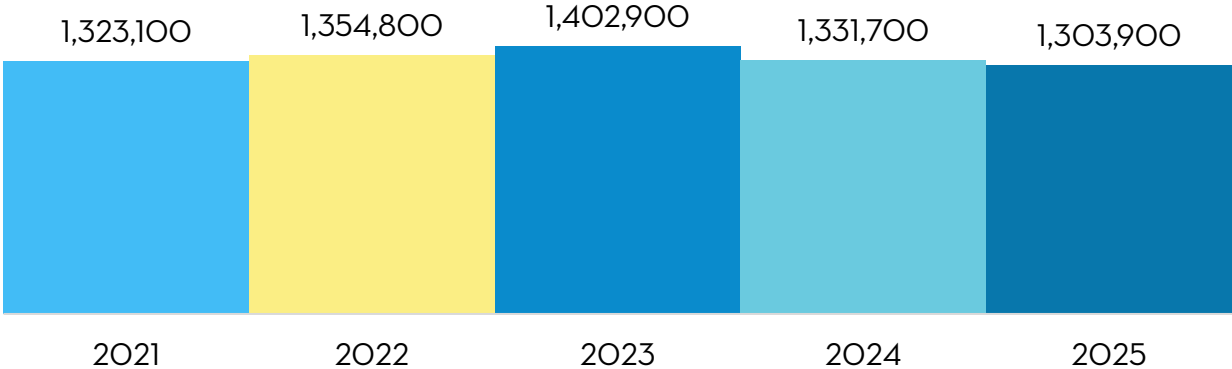


Revenue per Available Room

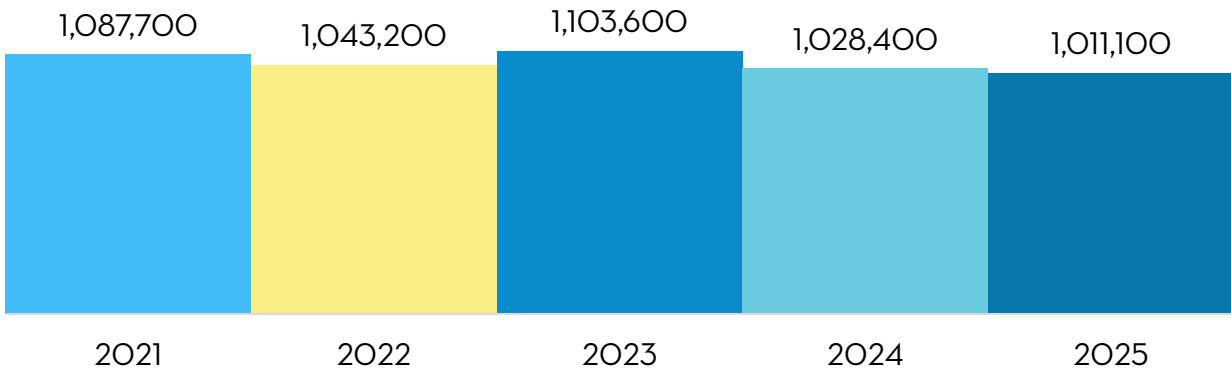


5-YEAR OVERVIEW - SPRING TOURISM METRICS

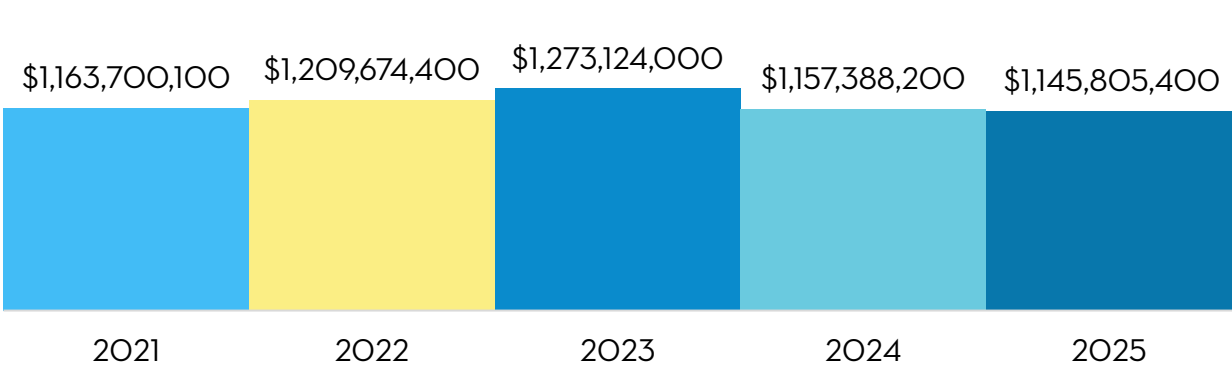
Visitors



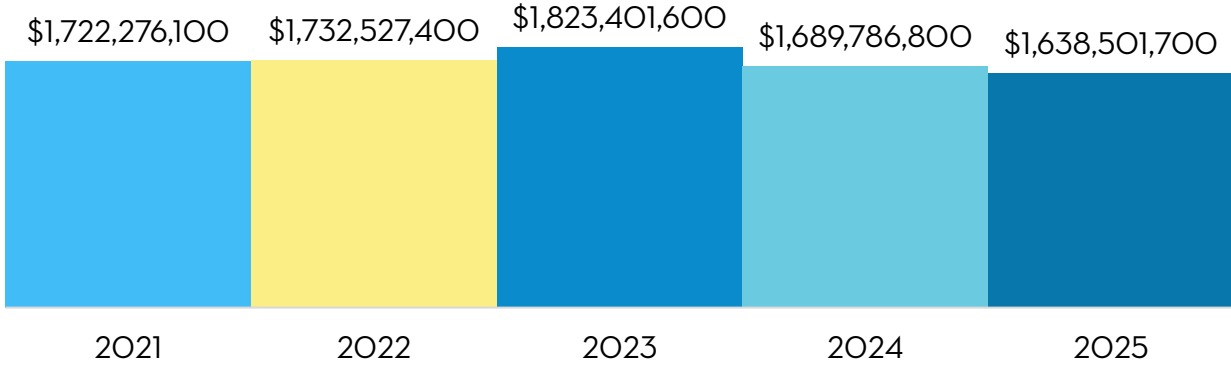
Room Nights



Direct Spending



Economic Impact



VISITOR JOURNEY: PRE-VISIT



PLANNING CYCLE



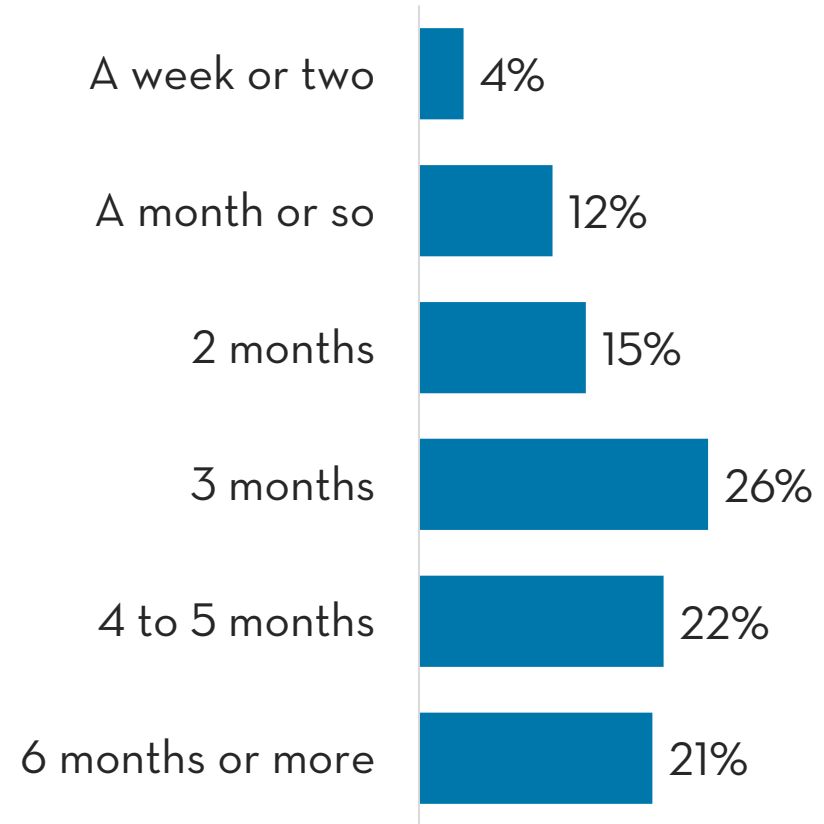
Nearly 7 in 10 visitors plan a Walton County Spring vacation at least **3 months** in advance



Nearly 1 in 6 visitors to Walton County have **a short (a month or less) planning cycle**



Typical trip planning cycle begins **101 days** before the trip (**99 days** in 2024)



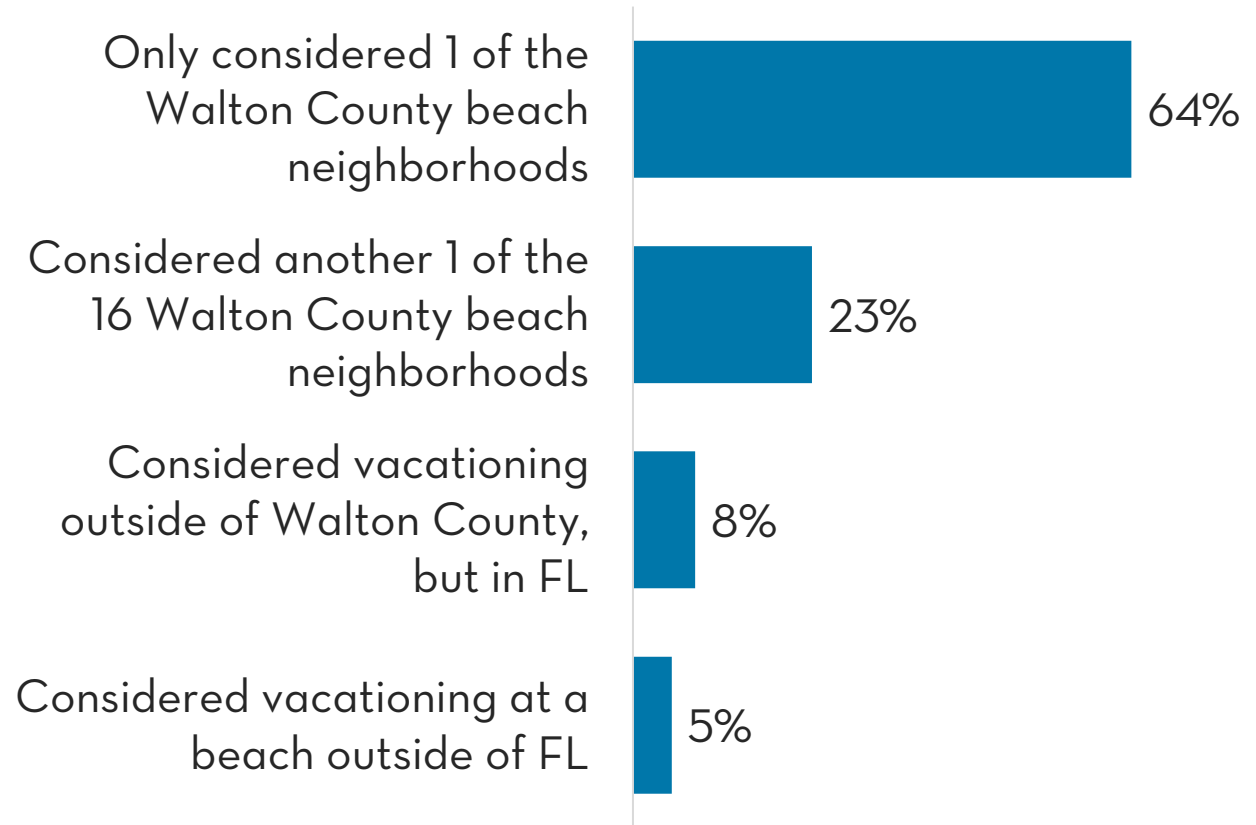
OTHER DESTINATIONS CONSIDERED



Nearly 2 in 3 (-4% points from 2024) Spring visitors only consider going to the Walton County beach neighborhood where they stay



1 in 10 use the term “South Walton” when referring to the area

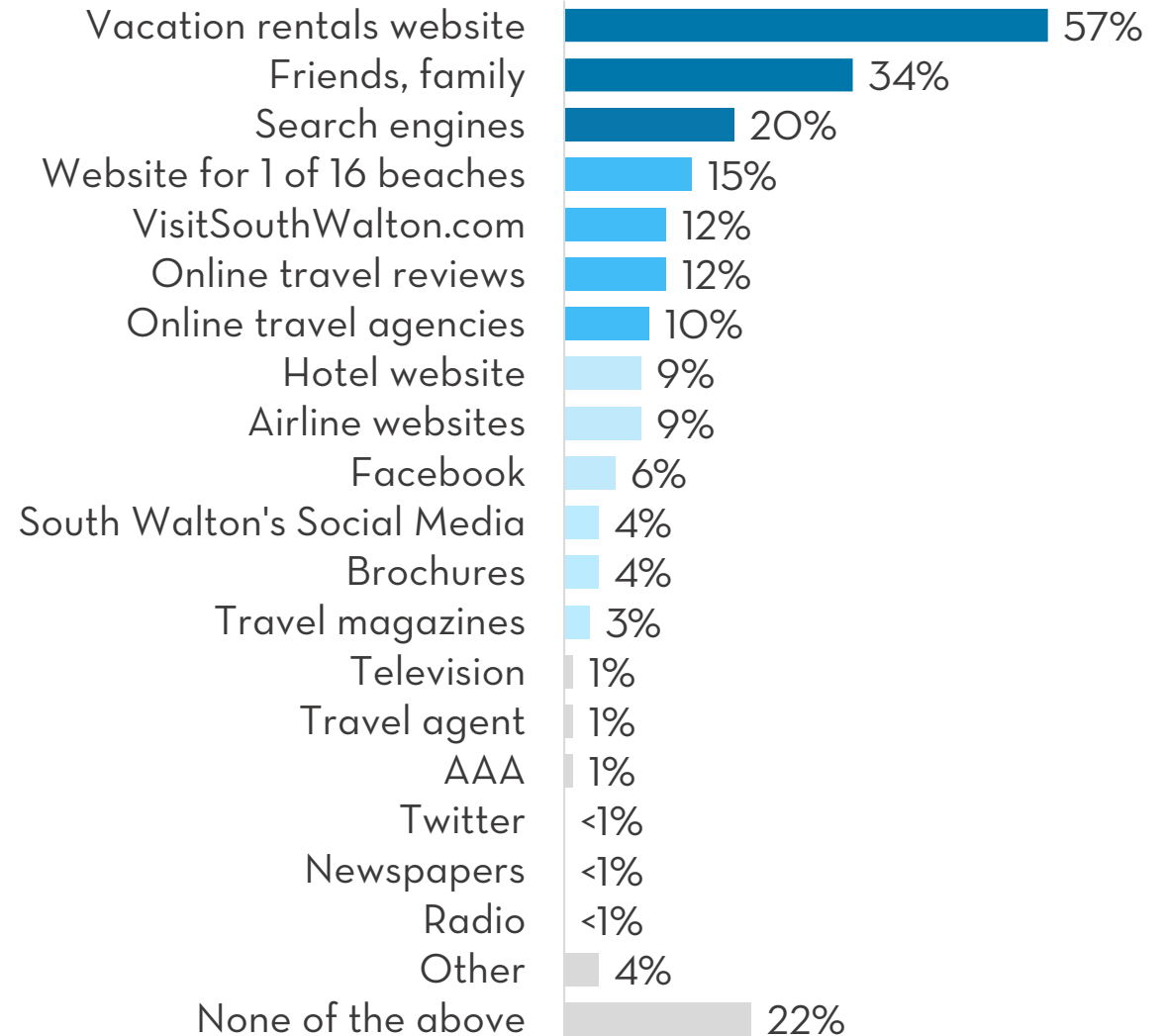


TRIP PLANNING SOURCES¹

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

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

1 in 5 visitors use a search engine to help plan their trip to Walton County



¹ Multiple responses permitted.

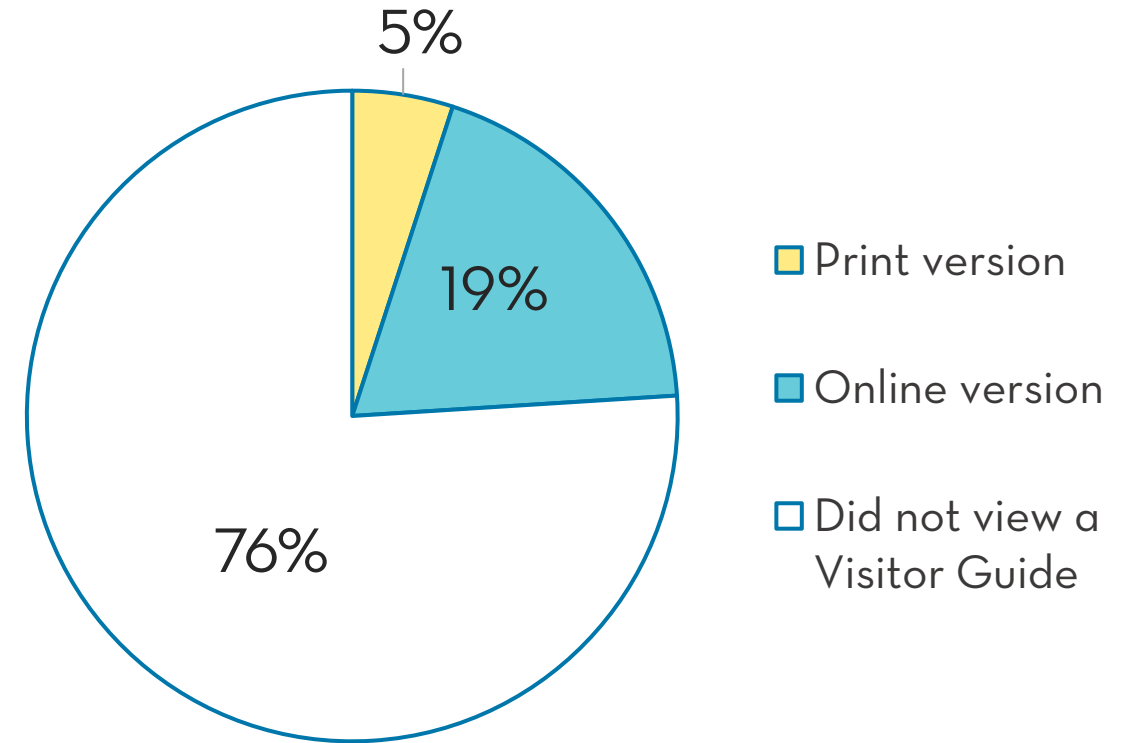
WALTON COUNTY VISITOR GUIDE



Nearly 1 in 4 visitors view a Walton County Visitor Guide before going to the area

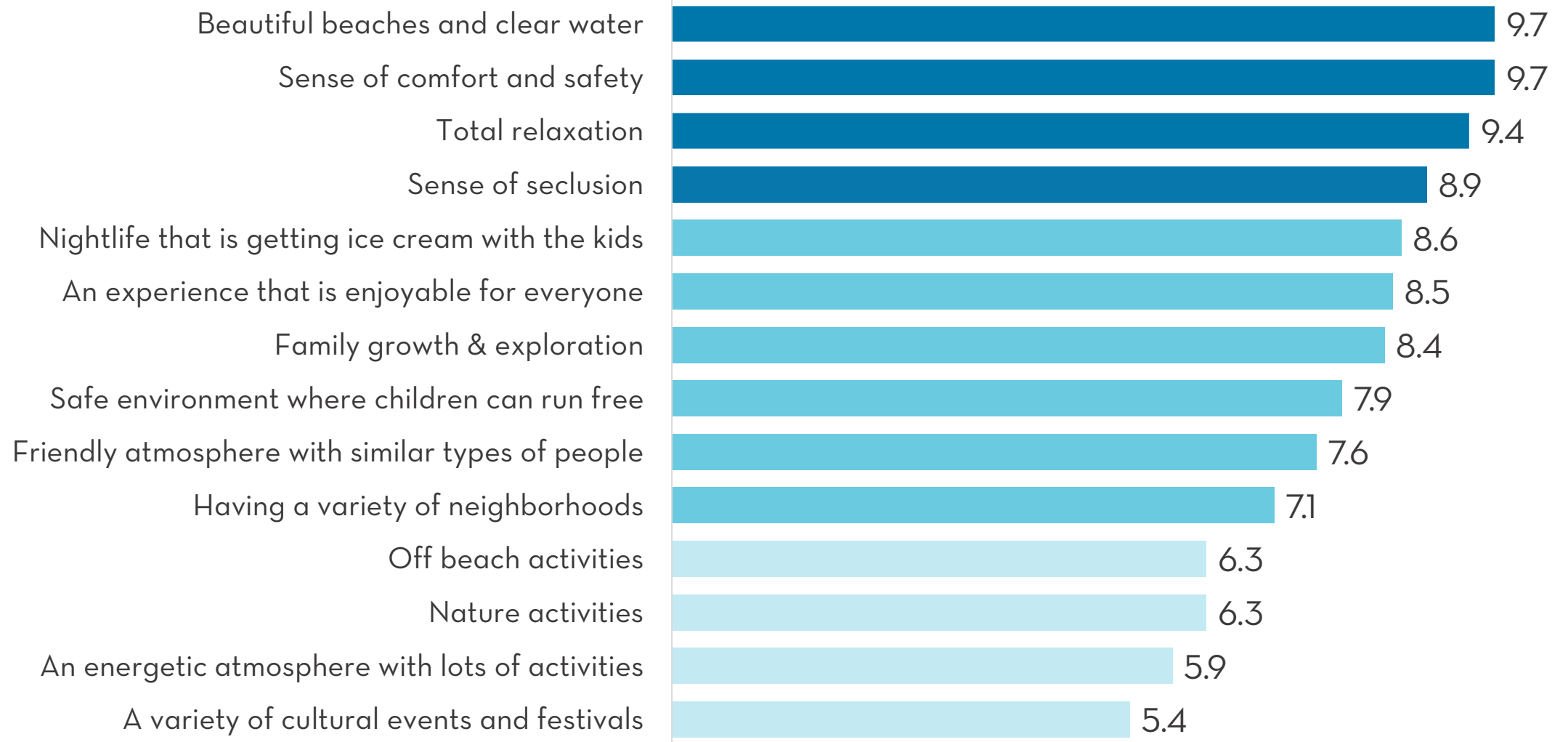


Spring visitors give the Visitor Guide a rating of **8.8 out of 10**¹ (+0.2 points from 2024)



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.

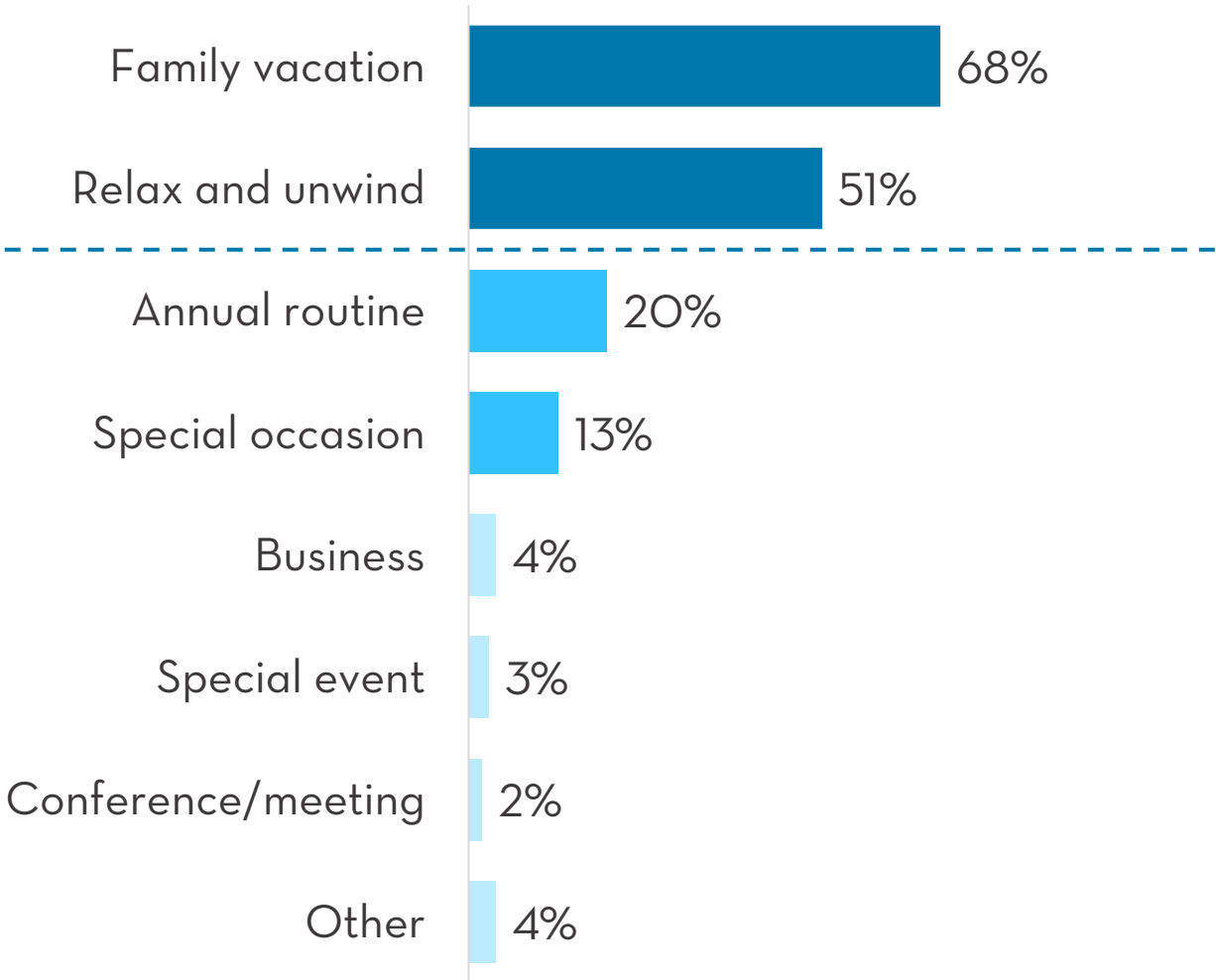
REASONS FOR VISITING¹



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



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



¹Multiple responses permitted.

WALTON COUNTY PROMOTIONS¹



29% (-1% points from 2024) of Spring visitors recall advertising, promotions, or travel stories for Walton County

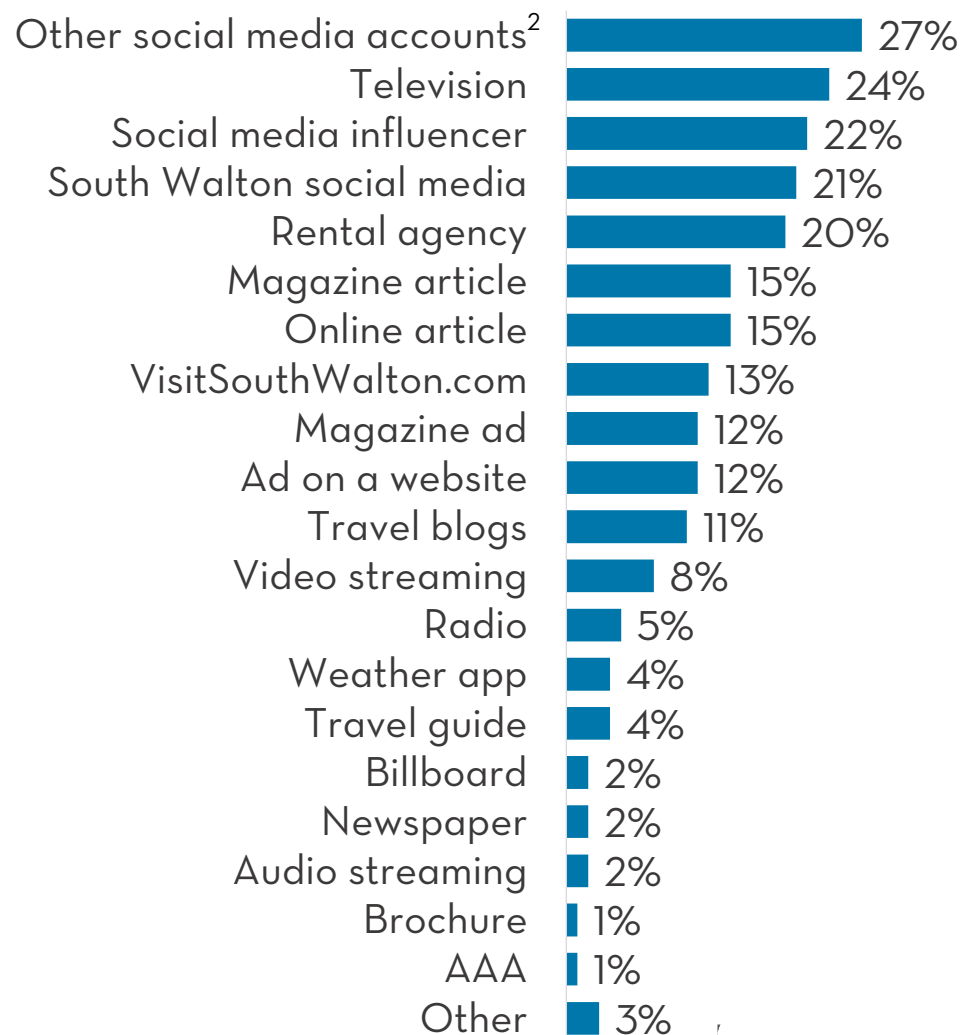


This information influences **8%** (+1% points from 2024) of all visitors to visit Walton County



27% (-3% points from 2024) Spring visitors recall information about the destination on **Other Social Media Accounts**

Base: **29%** of visitors who recall advertising



¹Multiple responses permitted.

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

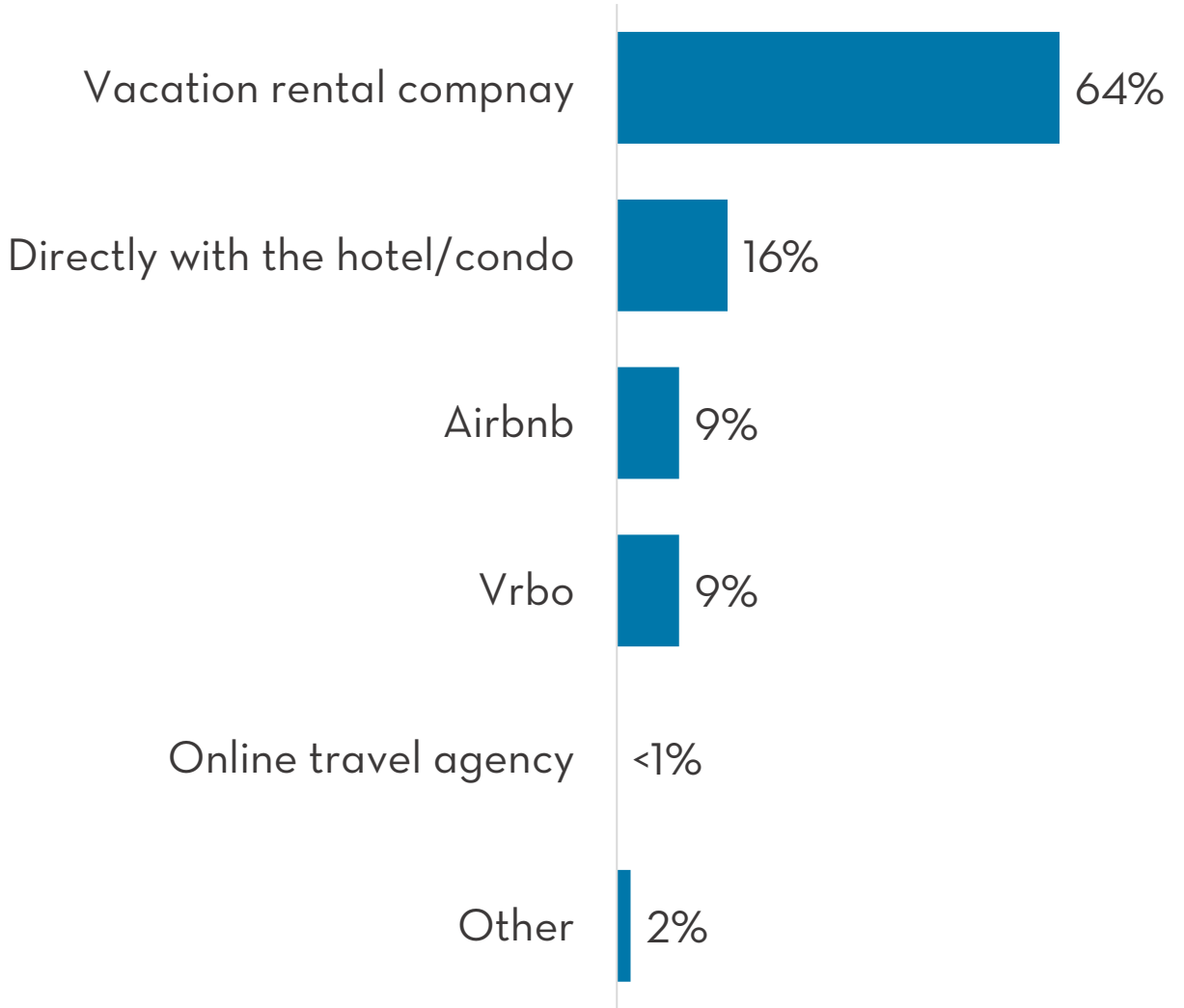
BOOKING ACCOMMODATIONS



Nearly 2 in 3 visitors book accommodations through a **vacation rental company**



Nearly 1 in 6 Spring visitors book **directly with a hotel or condo**



VISITOR TRANSPORTATION

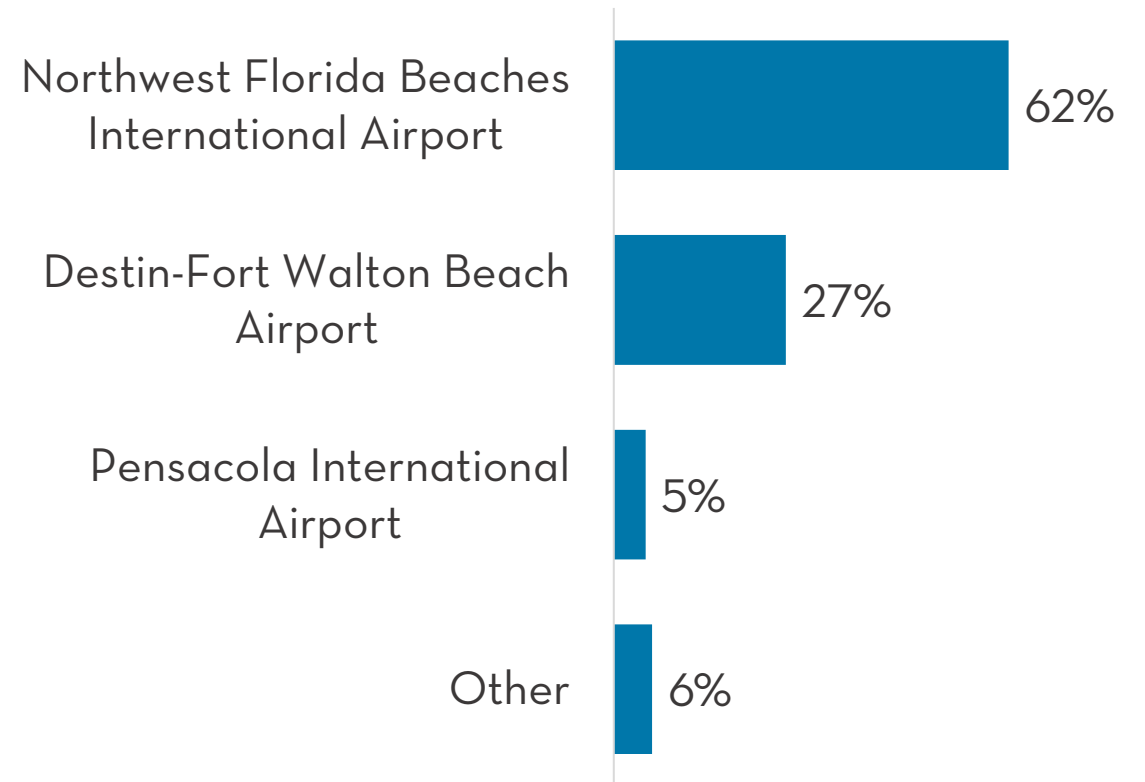


73% (+1% points from 2024) of Spring visitors drive to Walton County



28% (-4% points from 2024) of those who drive are aware that there are direct flights from their city to the Walton County area, and **24%** are not sure if there are direct flights available

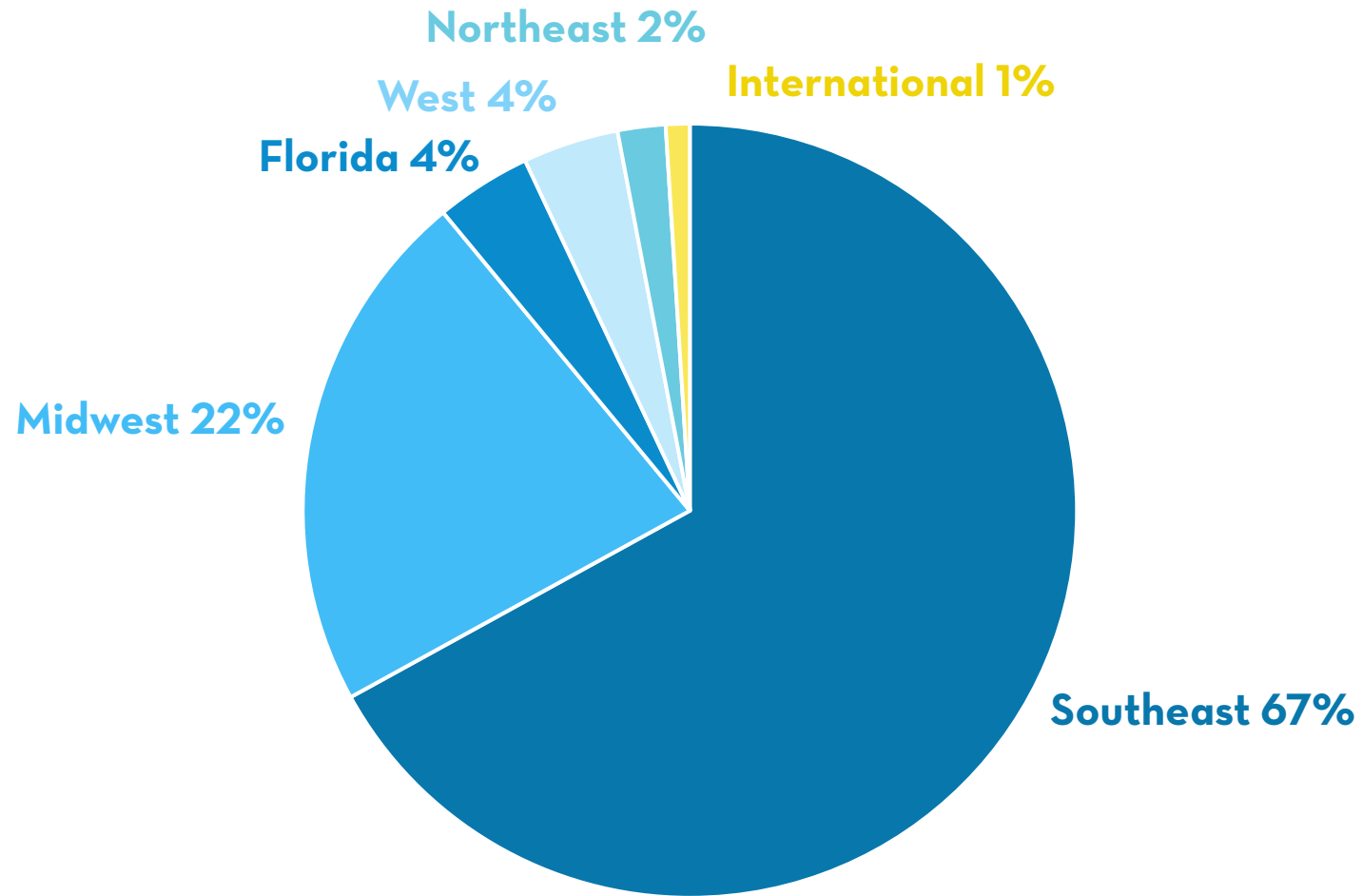
27% who **fly** use the following airports:



VISITOR JOURNEY: TRAVEL PARTY PROFILE

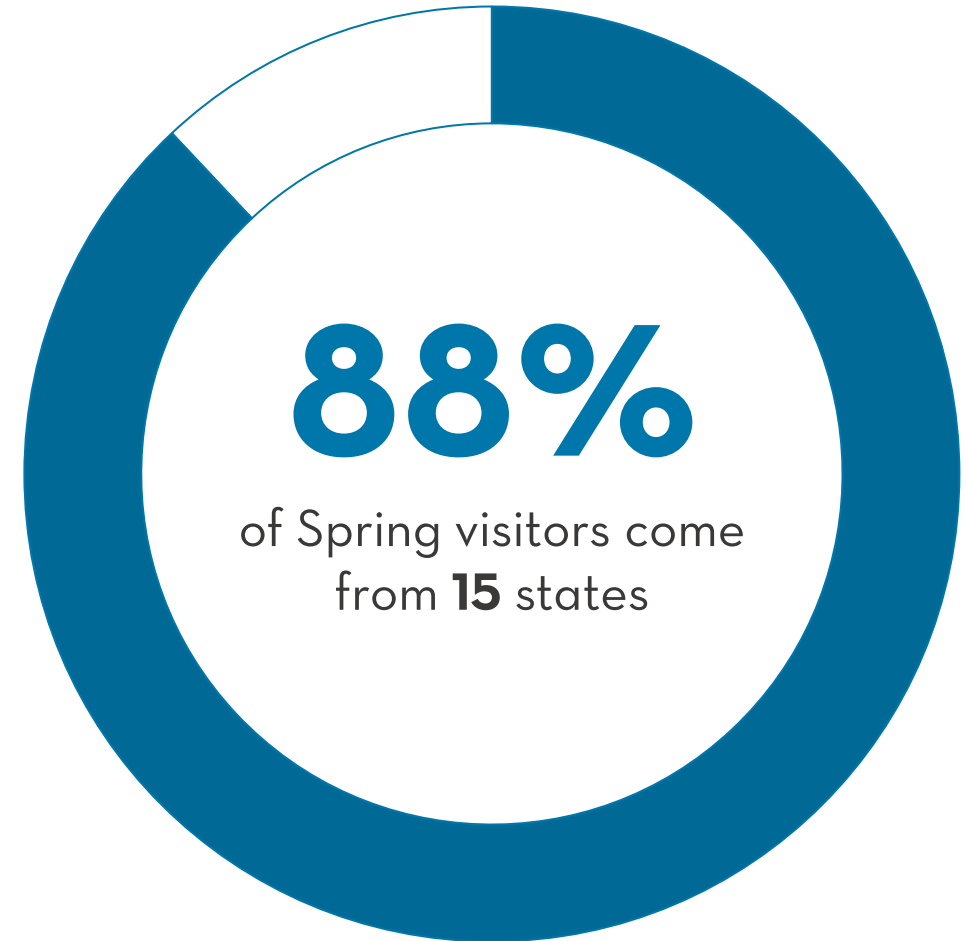


ORIGIN OF SPRING VISITORS



ORIGIN OF SPRING VISITORS

State	% of Visitors
Georgia	14%
Tennessee	12%
Texas	12%
Alabama	10%
Mississippi	8%
Kentucky	4%
Florida	4%
Indiana	4%
Louisiana	4%
Arkansas	3%
Illinois	3%
Missouri	3%
Ohio	3%
North Carolina	2%
Oklahoma	2%



ORIGIN OF SPRING VISITORS

12% (-1% points from 2024) of all visitors come from the **Atlanta** market

8% (-2% points from 2024) of visitors are from the **Nashville** market

Top Origin Markets	% of Visitors
Atlanta	12%
Nashville	8%
Dallas-Fort Worth	4%
Houston	4%
Birmingham	4%
Columbus-Tupelo-West Point	4%
New Orleans	3%
Memphis	3%
Mobile-Pensacola	2%
Chicago	2%
Louisville	2%
Montgomery	2%
Saint Louis	2%
Little Rock-Pine Bluff	2%

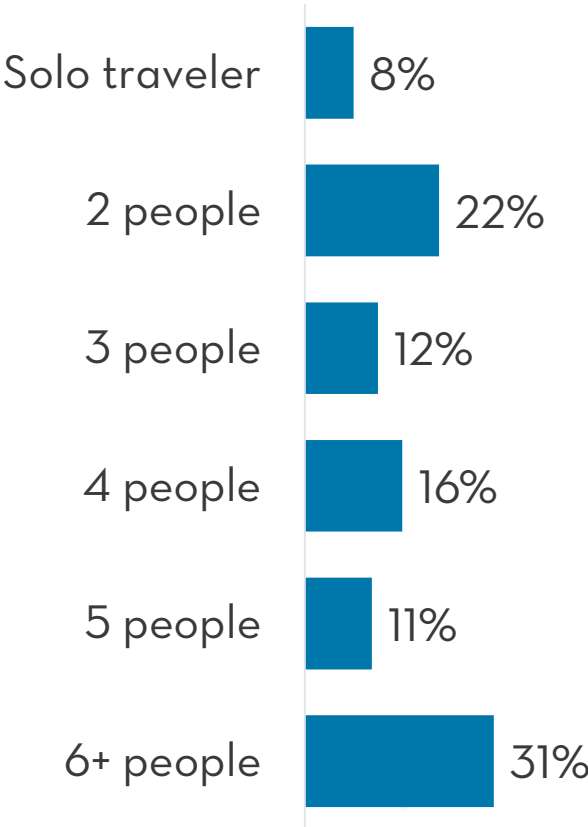
TRAVEL PARTY SIZE AND COMPOSITION



Visitors travel in a party composed of **4.7** people (4.5 in 2024)



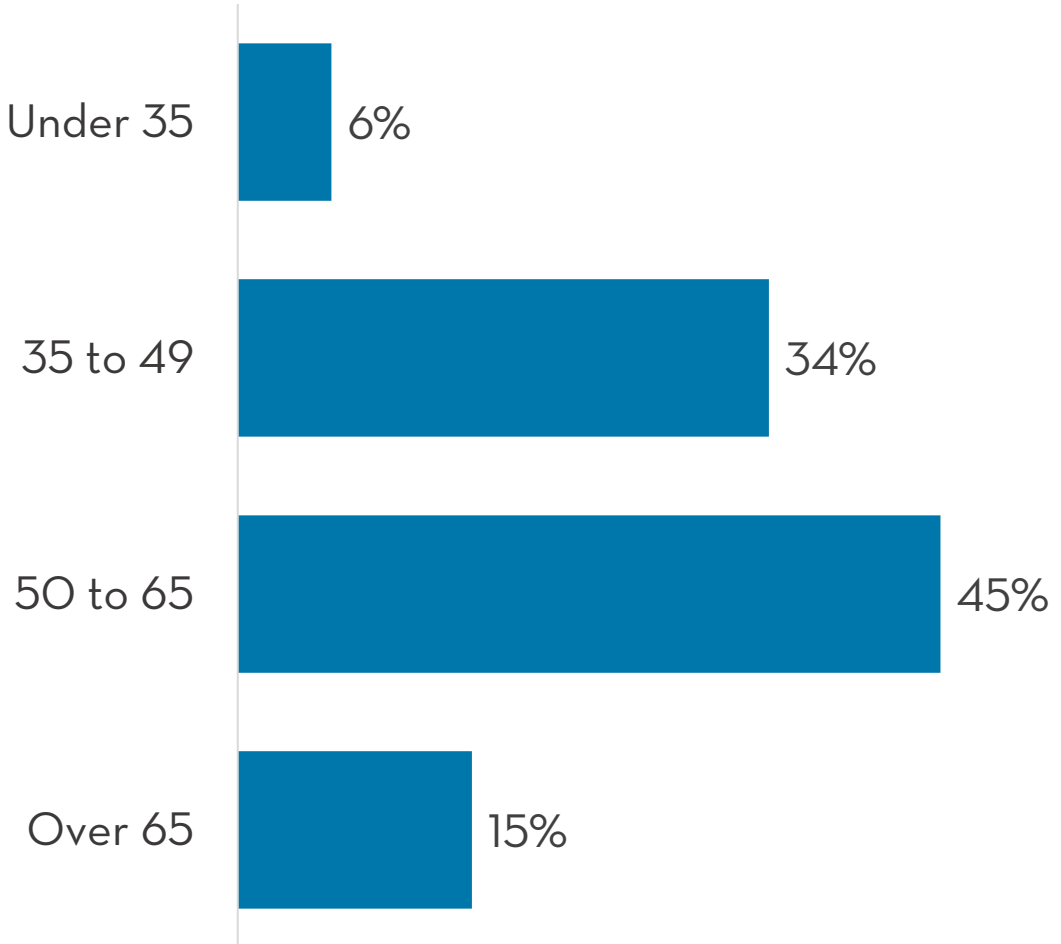
54% (+4% points from 2024) of visitors travel with children under the age of 20



AGE OF SPRING VISITORS

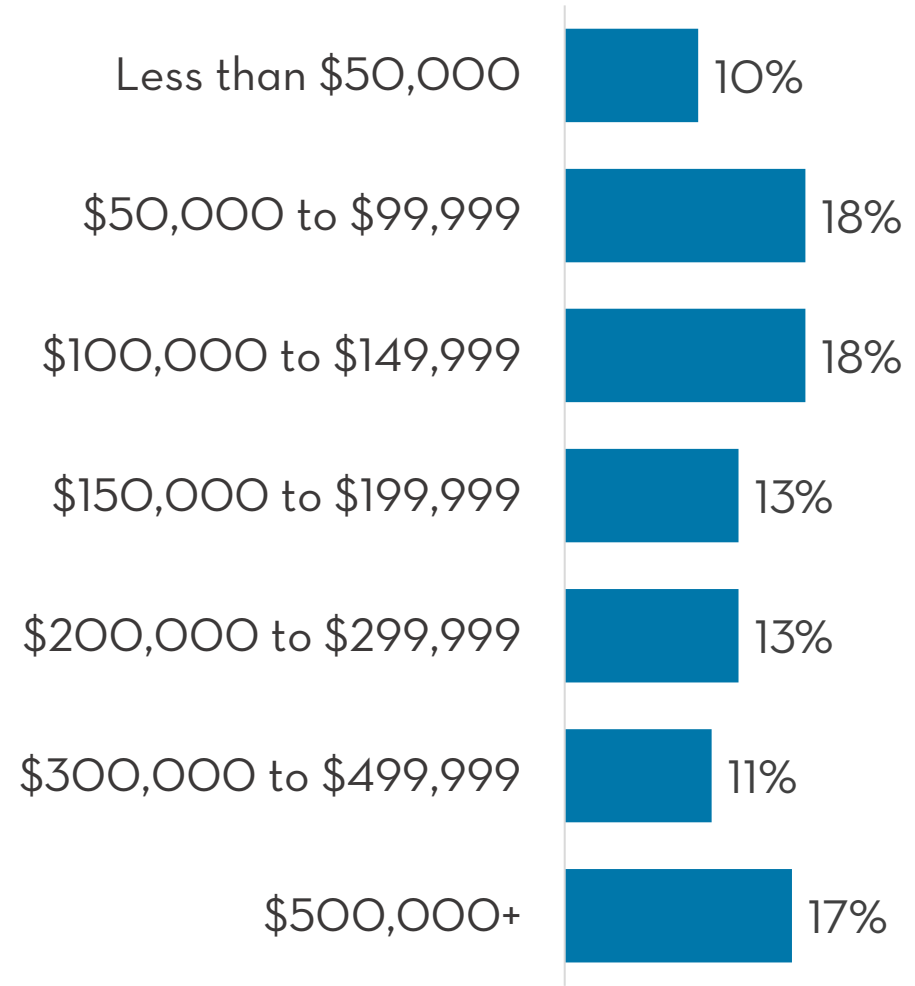


Median age of Spring visitors is **53 years old** (54 years old in 2024)



TOTAL HOUSEHOLD INCOME

Spring visitors have a **median** household income of **\$165,400** (\$156,700 in 2024), while estimated **average** household income is **\$225,300** (\$209,300 in 2024)



VISITOR JOURNEY: TRIP EXPERIENCE



VISITOR ACCOMMODATIONS



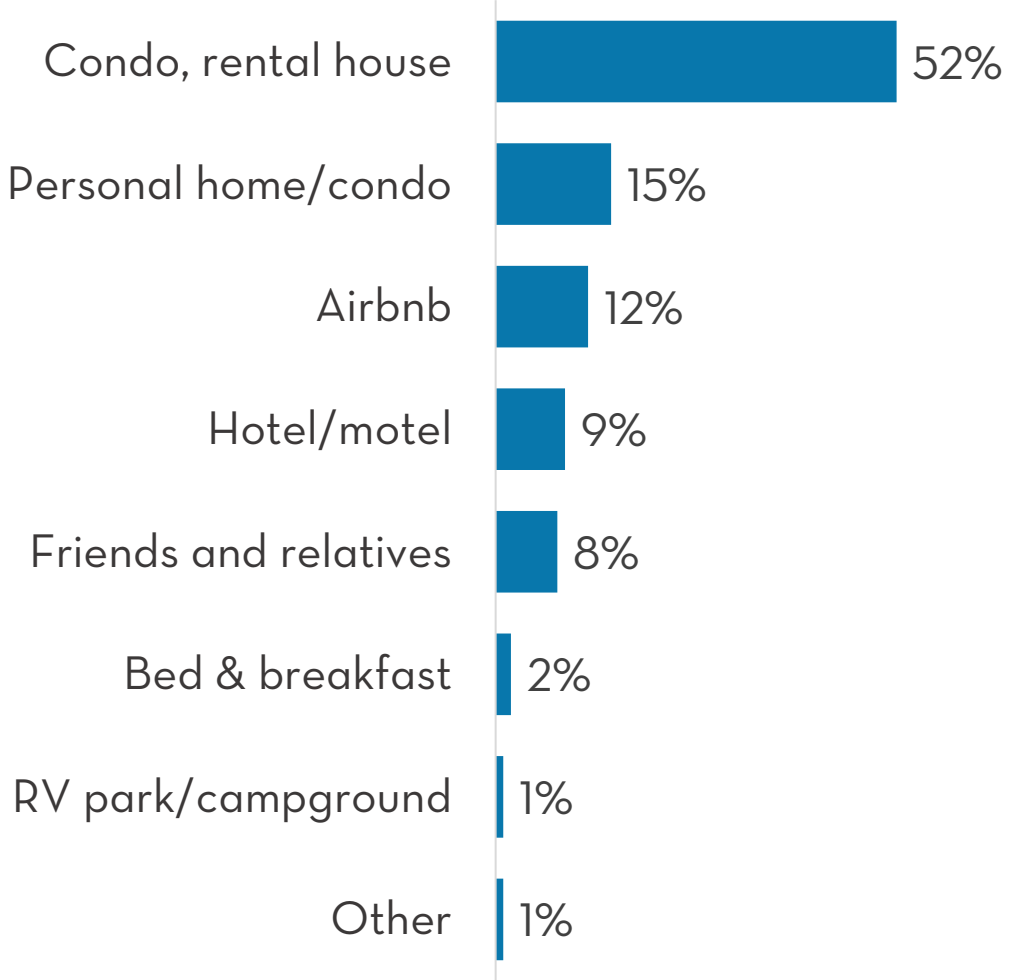
Over half of Spring visitors stay in a condo or rental house



15% visitors stay in their personal home or condo



12% stay in an Airbnb



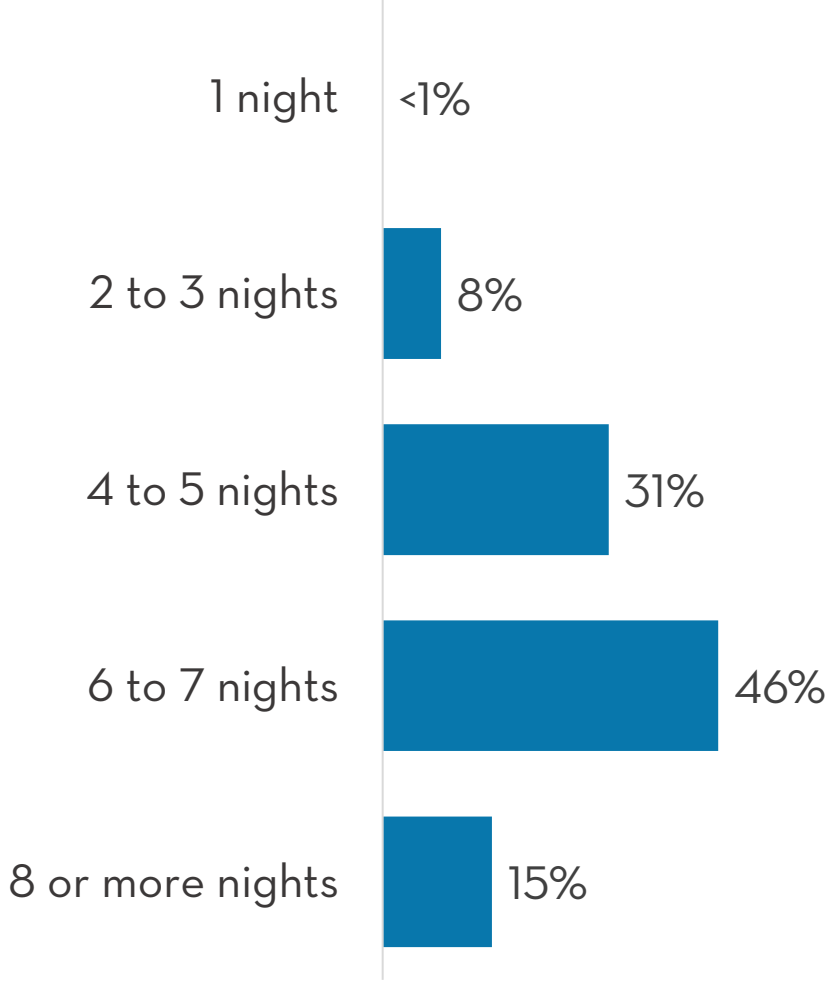
LENGTH OF STAY



Spring visitors¹ stay an average of **6.3** nights² in Walton County (6.2 nights in 2024)



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



15% (+1% points from 2024) of Spring visitors are visiting for the first time



37% (-1% points from 2024) of Spring visitors have visited Walton County more than 10 times

That was my first time



15%

2 - 3



19%

4 - 5



14%

6 - 10



15%

11 - 20



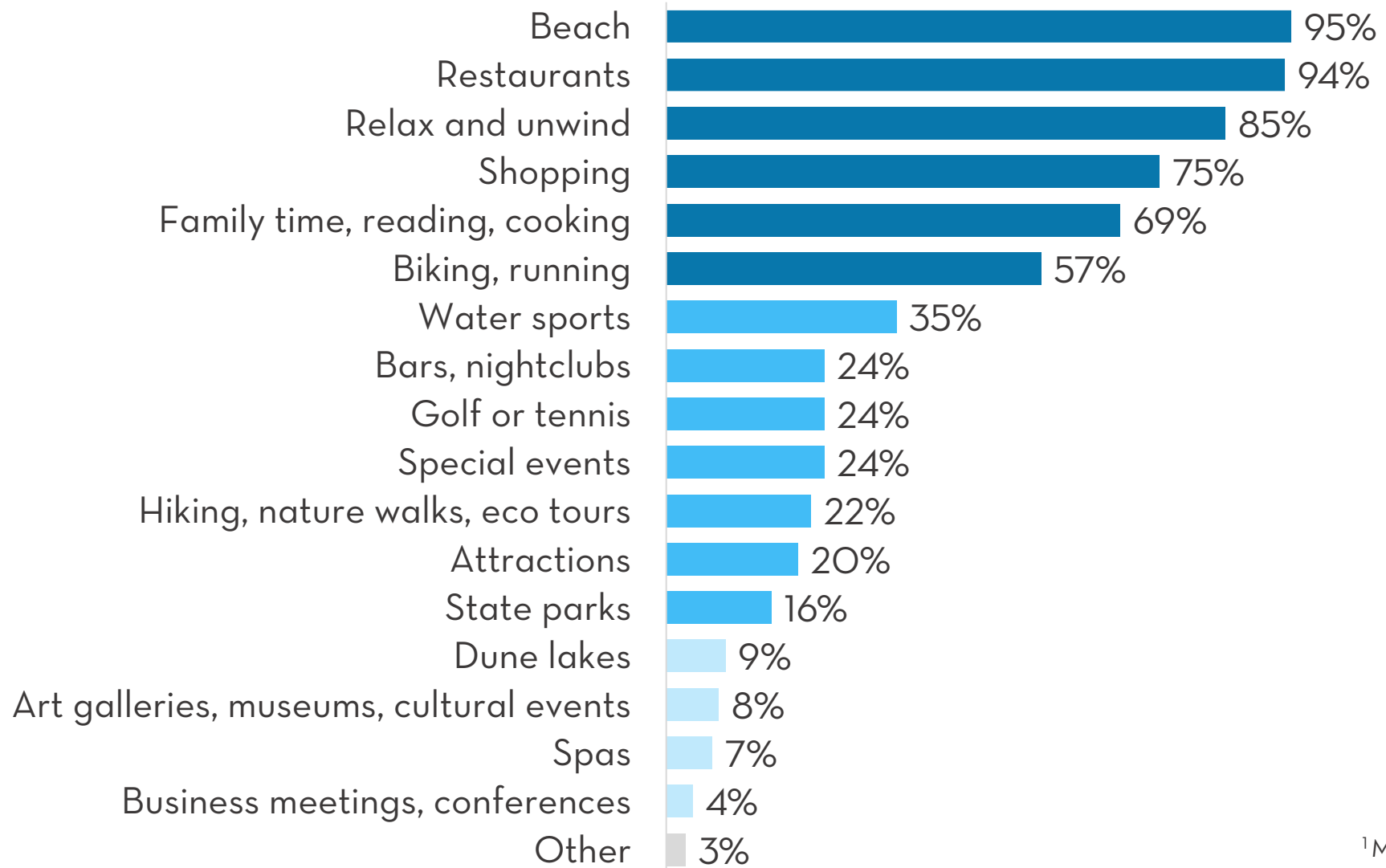
18%

21+



19%

VISITOR ACTIVITIES¹

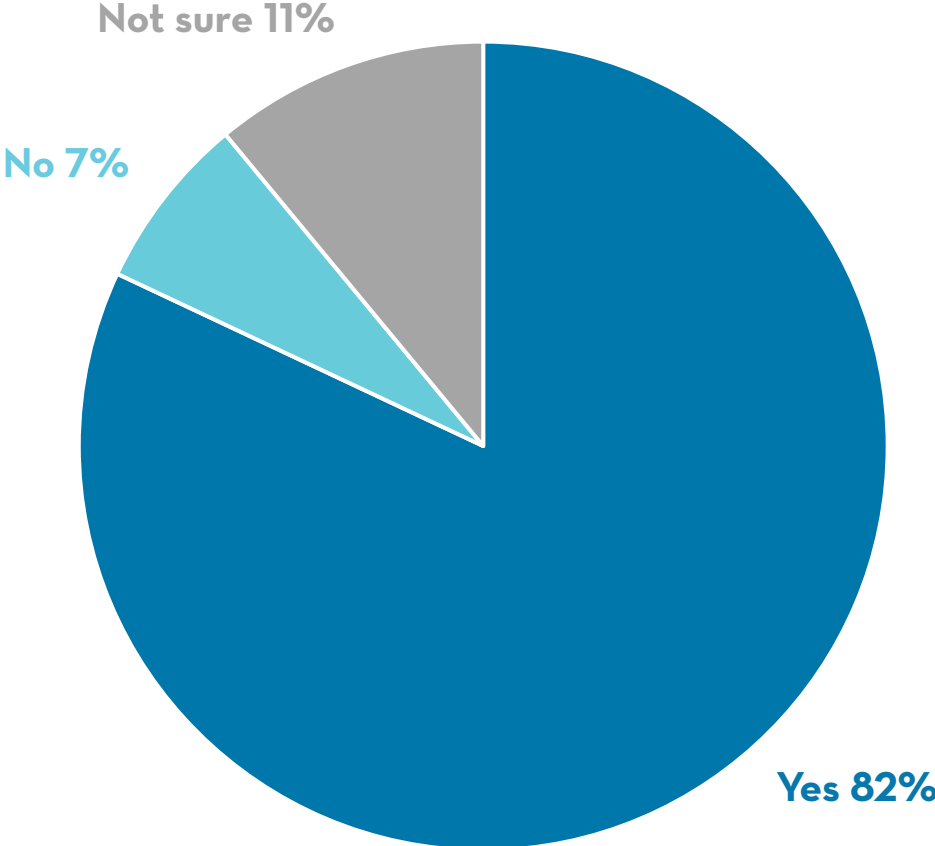


¹Multiple responses permitted.

BEACH SAFETY



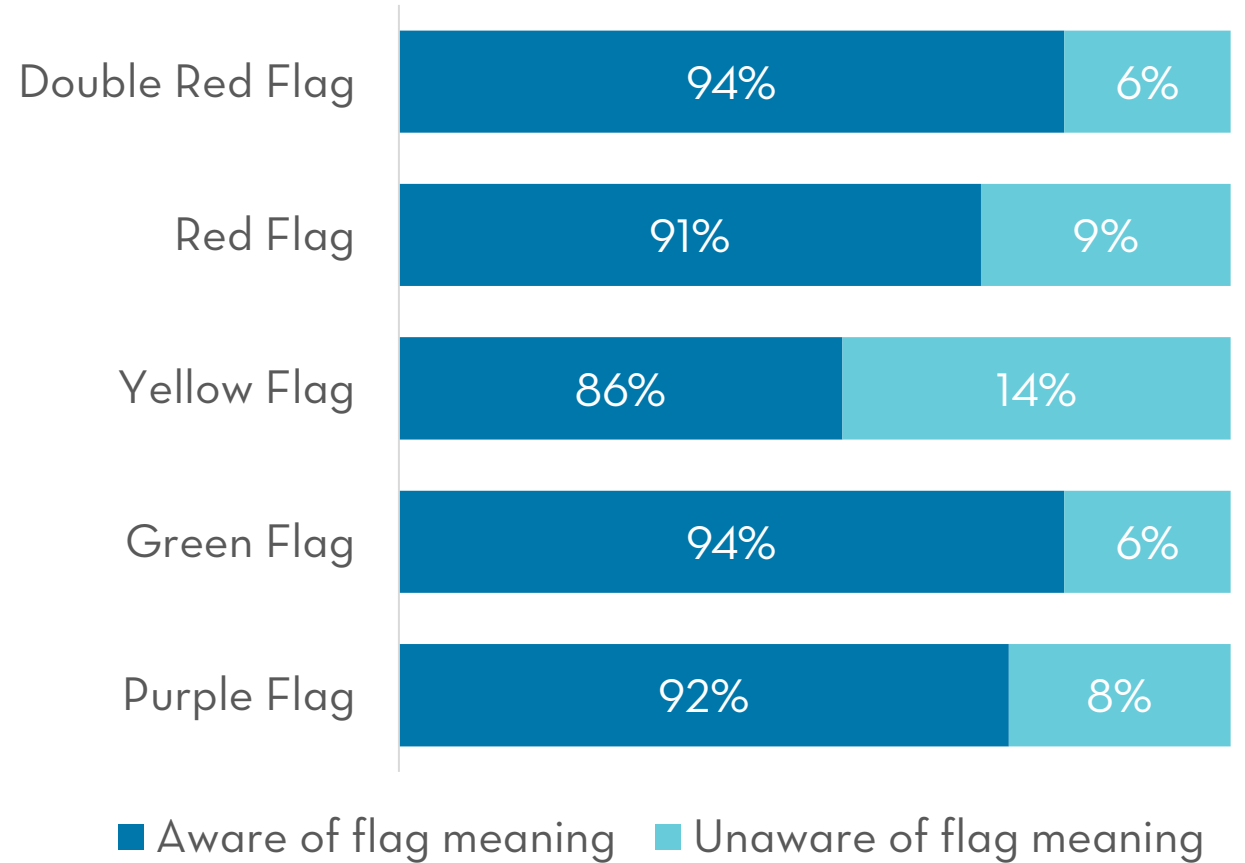
82% of Spring visitors know there are flags posted along the beaches to indicate how safe it is to go into the water



BEACH FLAG AWARENESS

Over 5 in 6 Spring visitors are aware of the meaning of each flag color

69% (+2% points from 2024) of Spring visitors are aware that entering the Gulf during double red flag conditions can result in a \$500 fine and criminal charges



TYPICAL WALTON COUNTY TRAVEL PARTY EXPENSES¹

- » The typical travel party spends **\$687** (\$656 in 2024) a day while in Walton County.
- » The typical travel party spends a total of **\$4,360** (\$4,060 in 2024) while visiting Walton County.
- » Compared to 2024, total trip expenditures per travel party increased 7.4% due to longer lengths of stay and an increase in travel party size

Spending Category ¹	Average Daily Expenditure	Total Trip Expenditure
Accommodations	\$248	\$1,570
Restaurants	\$151	\$960
Groceries	\$66	\$420
Shopping	\$107	\$680
Entertainment	\$49	\$310
Transportation	\$50	\$320
Other	\$16	\$100
Total	\$687	\$4,360

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

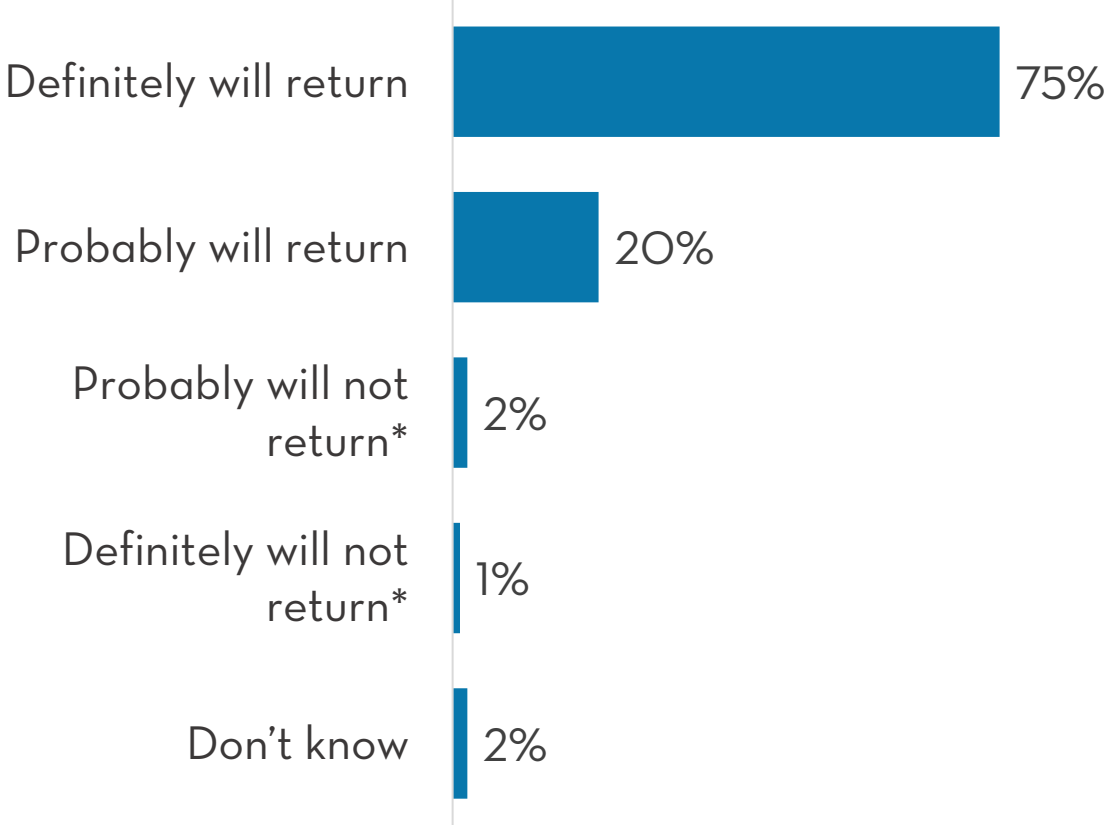


3 in 4 Spring visitors will definitely return to Walton County

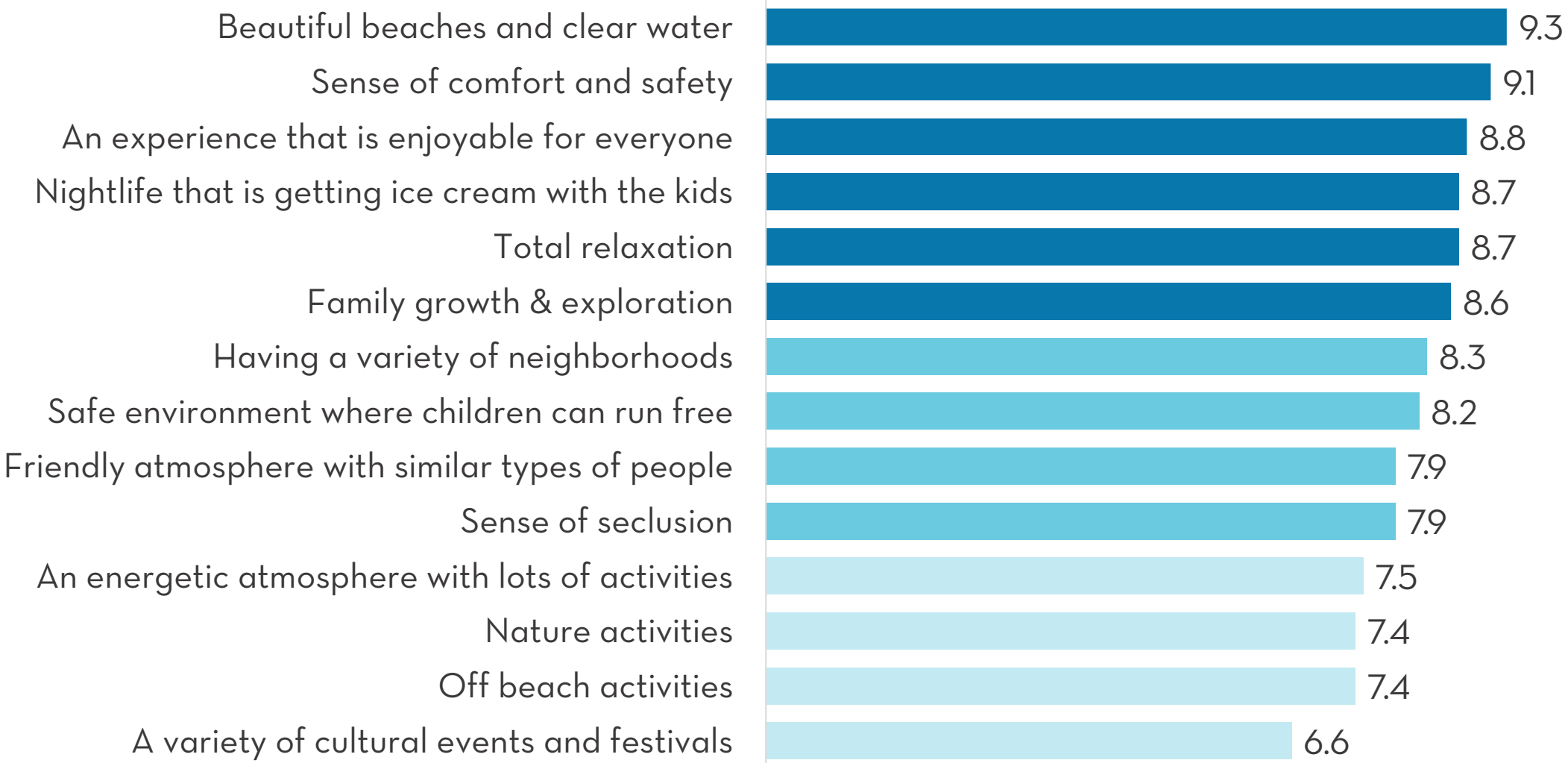


Only 5% of visitors are uncertain about returning. Top reasons include:

- 1. Too crowded
- 2. Parking was a problem
- 3. Too expensive
- 4. Traffic was a problem

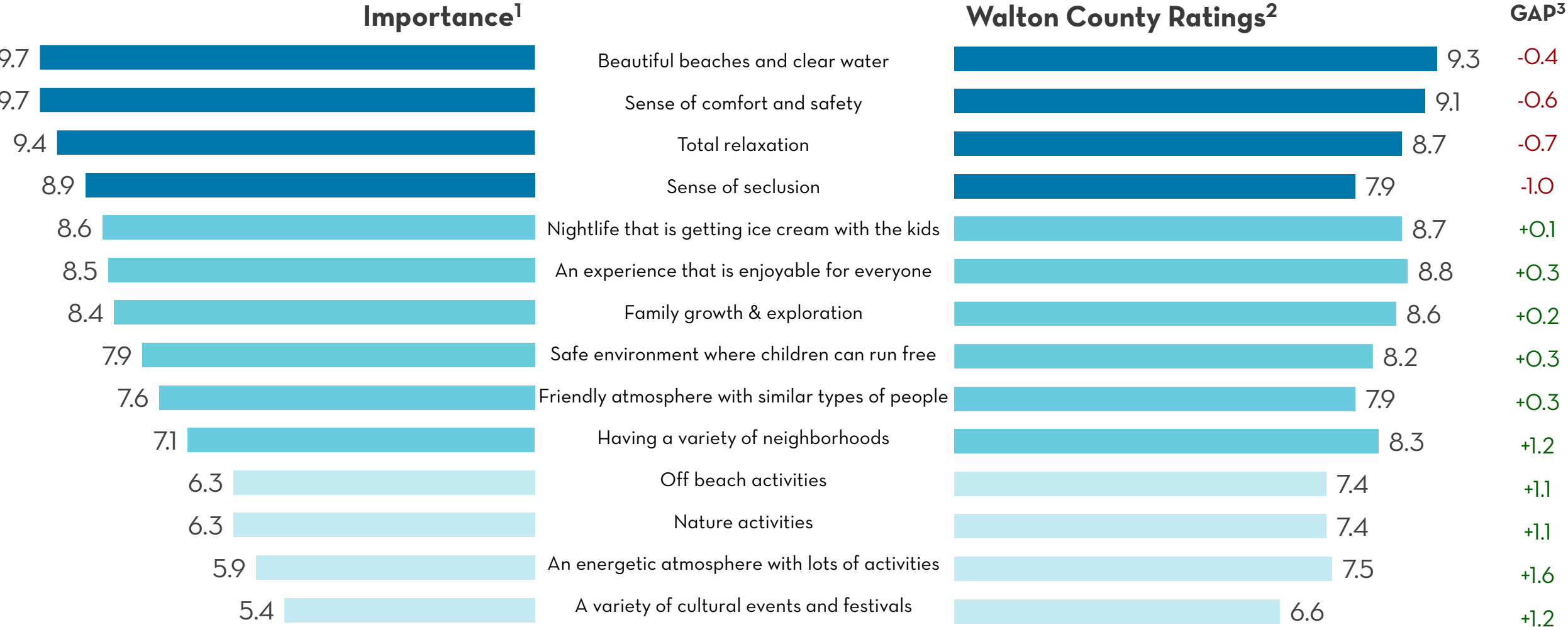


RATING WALTON COUNTY ATTRIBUTES¹



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 9.3 on its beaches. Hence, the GAP is -0.4.

AREA DESCRIPTIONS



“Perfect!! Wonderful family atmosphere, most beautiful and clean beach we have ever been to, and they allow golf carts (this is the highlight of the trip for our special needs teen son).”

“Great place for a multi-generational family vacation.”

“The Hamptons of the South. Too good to be true - the epitome of clean, safe, friendly, courteous, beautiful, and relaxing.”

“Beautiful white sandy beaches and crystal-clear turquoise waters with a lot of nature, restaurants, and shopping nearby beautiful homes to stay in!”

“Beautiful beaches and charming communities. What we like best is being able to leave your car parked at the house and traveling around in a golf cart.”

“World's most under-rated beaches!”

“Safe, beautiful, relaxing destination with great restaurants, nightlife, and the most beautiful beaches in all of the U.S.”

AREA DESCRIPTIONS



“Picturesque. Like I was on a movie set. Just beautiful.”

“Upscale and laidback family-friendly location.”

“A place where part of my soul lives and waits for my return.”

“Idyllic beach town, safe and beautiful beaches.”

“Expensive but completely dreamy.”

“Our annual trip to South Walton is more than a vacation. It is an opportunity and a privilege to experience nature, beauty, convenience, top-tier amenities, and relaxation all in one place.”

“Extraordinary, relaxed, expensive, worth it.”

“Sugar sand beaches, good spot for R&R.”

FEELINGS ASSOCIATED WITH WALTON COUNTY



"This place is special to our family. Lots of good times."

"We get to enjoy reliving old memories from when we visited a long time ago."

"It feels more like home than a vacation spot."

"We love the family atmosphere."

"My happy place where we can go as a family and all love it."

"Refreshing."

"Joy."

"I love spending time here and visiting family."

"This place is a blast. Always a good time."

"Perfect serenity with beautiful clear beaches and the softest white sand."

OPPORTUNITIES FOR IMPROVEMENT



“Beautiful beaches, nice restaurants, but they've locked down the beaches at night so depending on where you are staying, you can do a nighttime stroll on the beach anymore. Even the public beach areas have been shrunk. Very sad.”

“Great place except for fighting for beach space and not being able to allow your kids to walk anywhere after 7 by themselves... Sad kids can't go crabbing on the beach by themselves or walk to get a sweet treat at night.”

“Beautiful area, water, and beaches. It was once a place that kids could have fun, but the police presence is not friendly. The town now shuts down at 6pm leaving families bored... We paid way too much to be treated this way.”

“I would say that it was a great place to visit for the past 30 years, but the beach restrictions over property lines are ridiculous and I would advise to look elsewhere unless you are guaranteed access.”

WALTON COUNTY TOURISM

Spring 2025 Visitor Tracking Study

March - May 2025

Downs & St. Germain Research
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