

WALTON COUNTY TOURISM

Summer 2024 Visitor Tracking Study

June - August 2024



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Visitor Tracking Study

This report is based on 897 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 June and August 2024.

EXECUTIVE SUMMARY



SEASONAL SNAPSHOT

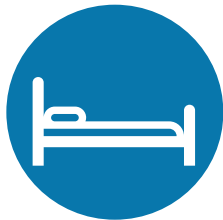
Summer 2024



2,056,800

TOTAL VISITORS

↓ 11.8%



1,283,400

ROOM NIGHTS

↓ 1.7%



\$ 1,663,697,800

DIRECT SPENDING

↓ 12.8%

vs. 2023

- Lodging metrics including occupancy, number of visitors, and room nights are down compared to Summer 2023.
- Direct spending and economic impact of tourism were down year over year, due to a decrease in the numbers of visitors and a decrease in ADR.
- A longer length of stay and a smaller travel party size resulted in the decrease in room nights being less than the decrease in visitors.
- TDT collections increased 1.3% in 2024 compared to 2023.
- With over 2 million visitors this Summer, total visitor spending was over \$1.6 billion.
- The top attributes considered most important to Walton County visitors (“beautiful beaches & clear water” and a “sense of comfort & safety”) also received the highest ratings for Walton County. A “sense of seclusion” garnered the largest difference between importance to visitors and the rating they gave 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 magazine articles are also highly recalled promotion sources.
- Over 3 in 4 Summer visitors are from the Southeastern U.S. including Florida.

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 - SUMMER 2023 VS. 2024

- » Direct spending and economic impact of tourism were down year over year, due to a decrease in the numbers of visitors and a decrease in ADR.
- » A longer length of stay and a smaller travel party size resulted in the decrease in room nights being less than the decrease in visitors.
- » Decreases in occupancy and room rates led to a 17.7% decrease in RevPAR from Summer 2023.

Visitor Metrics	Summer 2023	Summer 2024	% Δ
Room nights	1,305,200	1,283,400	-1.7%
Total visitors	2,331,700	2,056,800	-11.8%
TDT collections	\$28,818,876	\$29,185,008	+1.3%
Direct spending	\$1,908,370,100	\$1,663,697,800	-12.8%
Economic impact¹	\$2,733,217,700	\$2,428,998,800	-11.1%
Occupancy	71.8%	68.1%	-5.2% ²
Room rates	\$580.80	\$504.21	-13.2% ²
RevPAR	\$417.01	\$343.37	-17.7% ²

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.

¹The economic impact multiplier for Walton County in 2024 is 1.46. In 2023 it was 1.43.

²Decreases in occupancy and room rates are partially due to changes in Key Data's database.

LODGING METRICS¹

68.1%

Occupancy

↓ 5.2%

\$504.21

ADR

↓ 13.2%

\$343.37

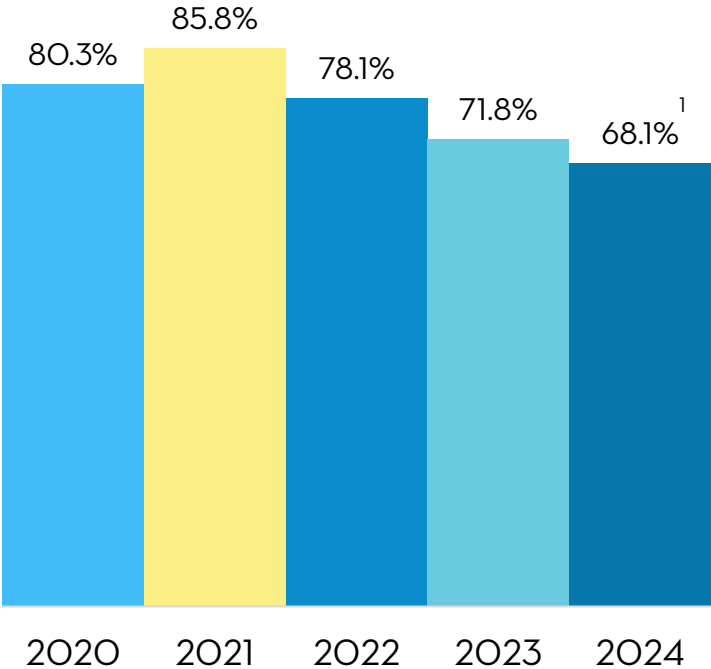
RevPAR

↓ 17.7%

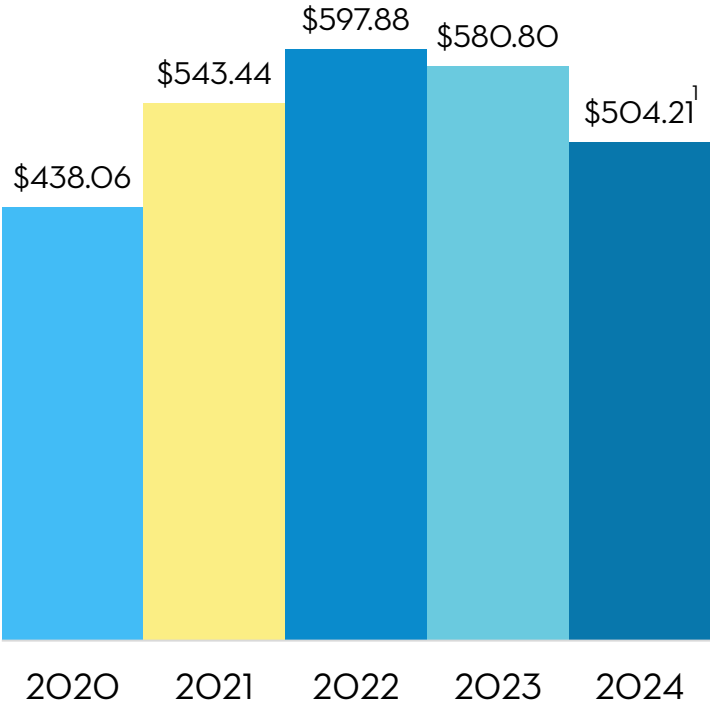
¹ Decreases in occupancy and room rates are partially due to changes in Key Data's database.

5-YEAR OVERVIEW - SUMMER LODGING METRICS

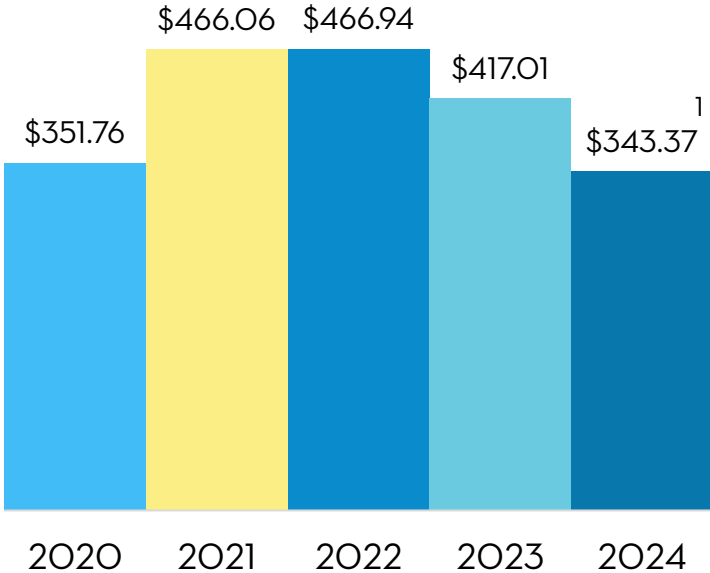
Occupancy Rate



Average Daily Rate



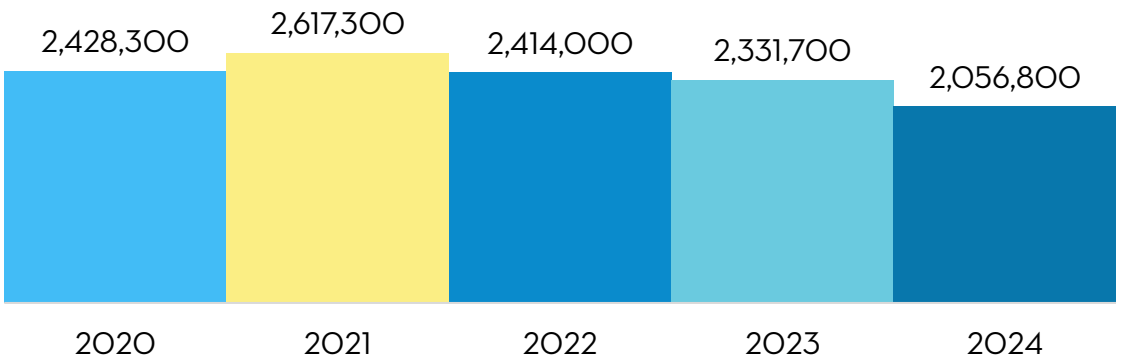
Revenue per Available Room



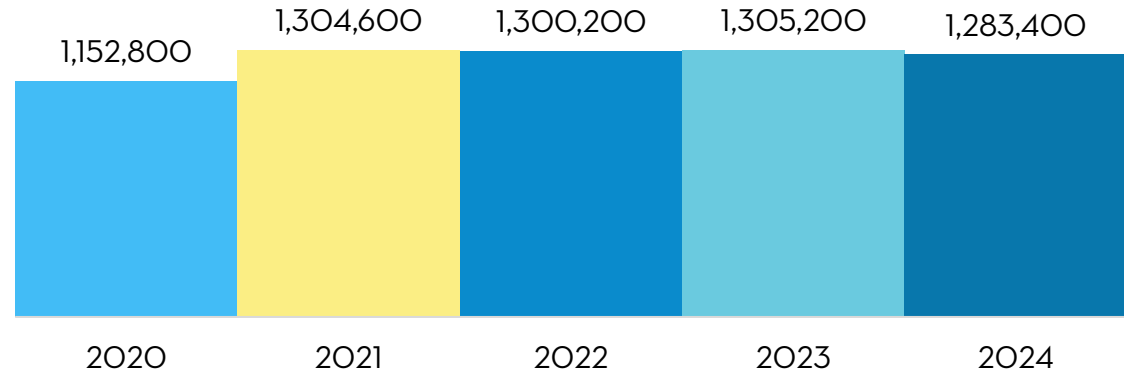
¹ Decreases in occupancy and room rates are partially due to changes in Key Data’s database.

5-YEAR OVERVIEW - SUMMER TOURISM METRICS

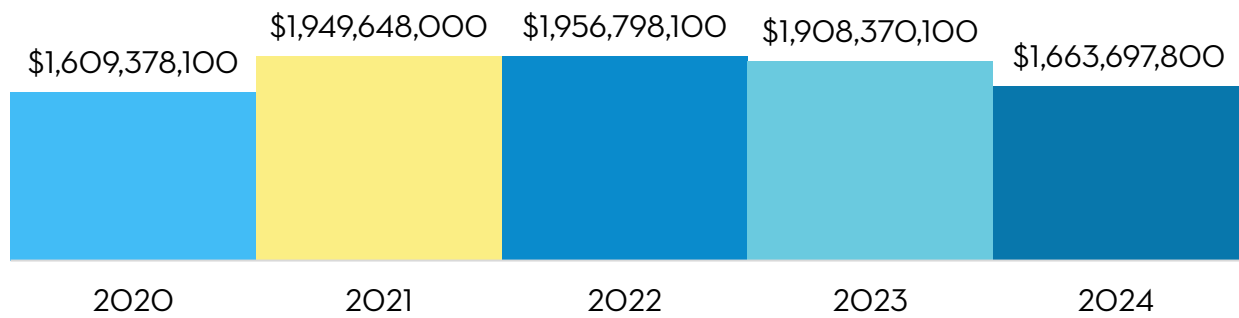
Visitors



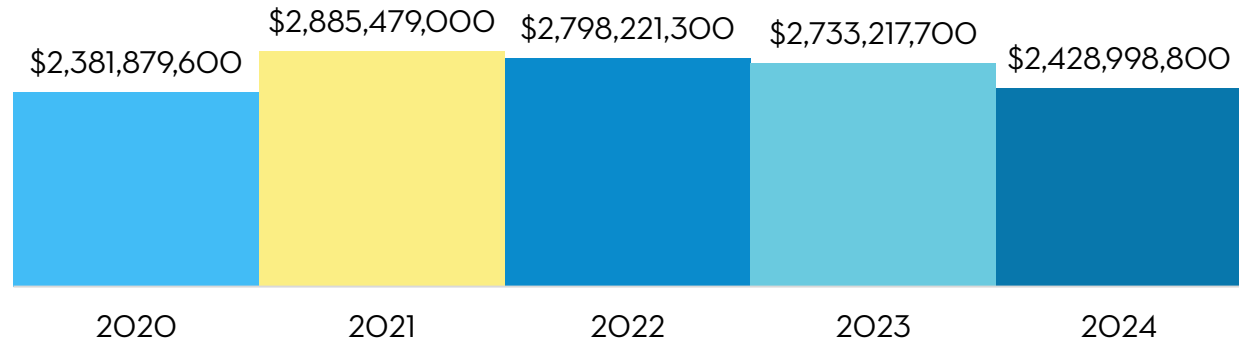
Room Nights



Direct Spending



Economic Impact



VISITOR JOURNEY: PRE-VISIT



PLANNING CYCLE

- » **Nearly 7 in 10** visitors plan a Walton County Summer vacation at least 3 months in advance
- » Average trip planning cycle begins **104 days** before the trip (**106 days in 2023**)
- » **Over 3 in 5** (+3% points from 2023) Summer visitors only consider one Walton County beach neighborhood as opposed to deciding among several of the beach neighborhoods in Walton County.



TOP TRIP PLANNING SOURCES*



Vacation rental website **51%**
(54% in 2023)



Friends/family **35%**
(41% in 2023)



Search engines **21%**
(25% in 2023)

WALTON COUNTY VISITOR GUIDE

- » **Nearly 1 in 4** visitors view (mostly online¹) Walton County's Visitors Guide before coming to the area
- » Summer visitors give the Visitors Guide a rating² of **8.6 out of 10** (+0.2 points from 2023)



¹18% used the online version & 5% used the print version.

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

TOP REASONS FOR VISIT*



Family vacation **75%**
(75% in 2023)



Relax & unwind **52%**
(55% in 2023)



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



Special occasion **12%**
(11% in 2023)

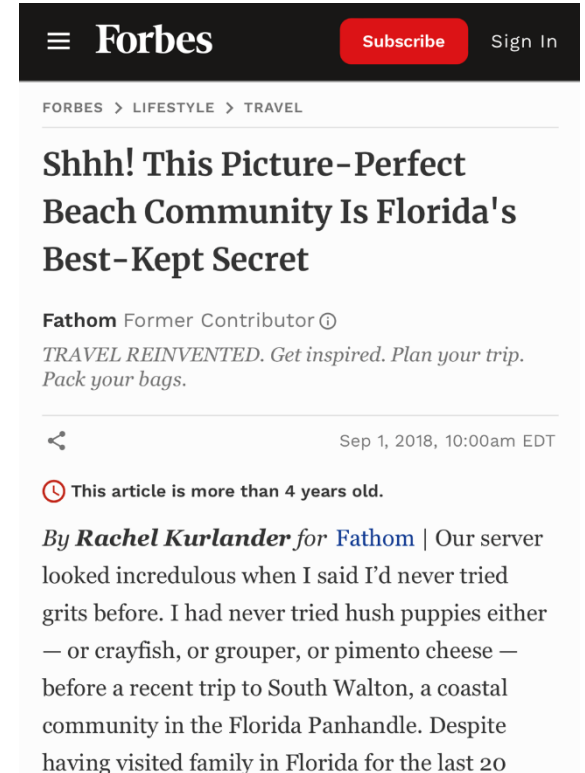
ADVERTISING RECALL

- » **23%** (-3% points from 2023) of visitors recall promotions about Walton County
- » This information influences **7%** (consistent with 2023) of all visitors to visit Walton County



TOP WALTON COUNTY PROMOTIONS¹

Base: 23% of visitors who recalled advertising



Other² social media accounts **23%**
(21% in 2023)

Television **20%**
(21% in 2023)

Magazine article **17%**
(18% in 2023)

Online article **15%**
(13% 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 the
hotel/condo

21%



Vrbo

10%



Airbnb

6%

VISITOR TRANSPORTATION

- » **75%** of visitors drive to Walton County
- » **25%** (+1% points from 2023) who fly use the following airports:

63%

Northwest Florida Beaches
International Airport



26%

Destin-Ft. Walton Beach Airport



6%

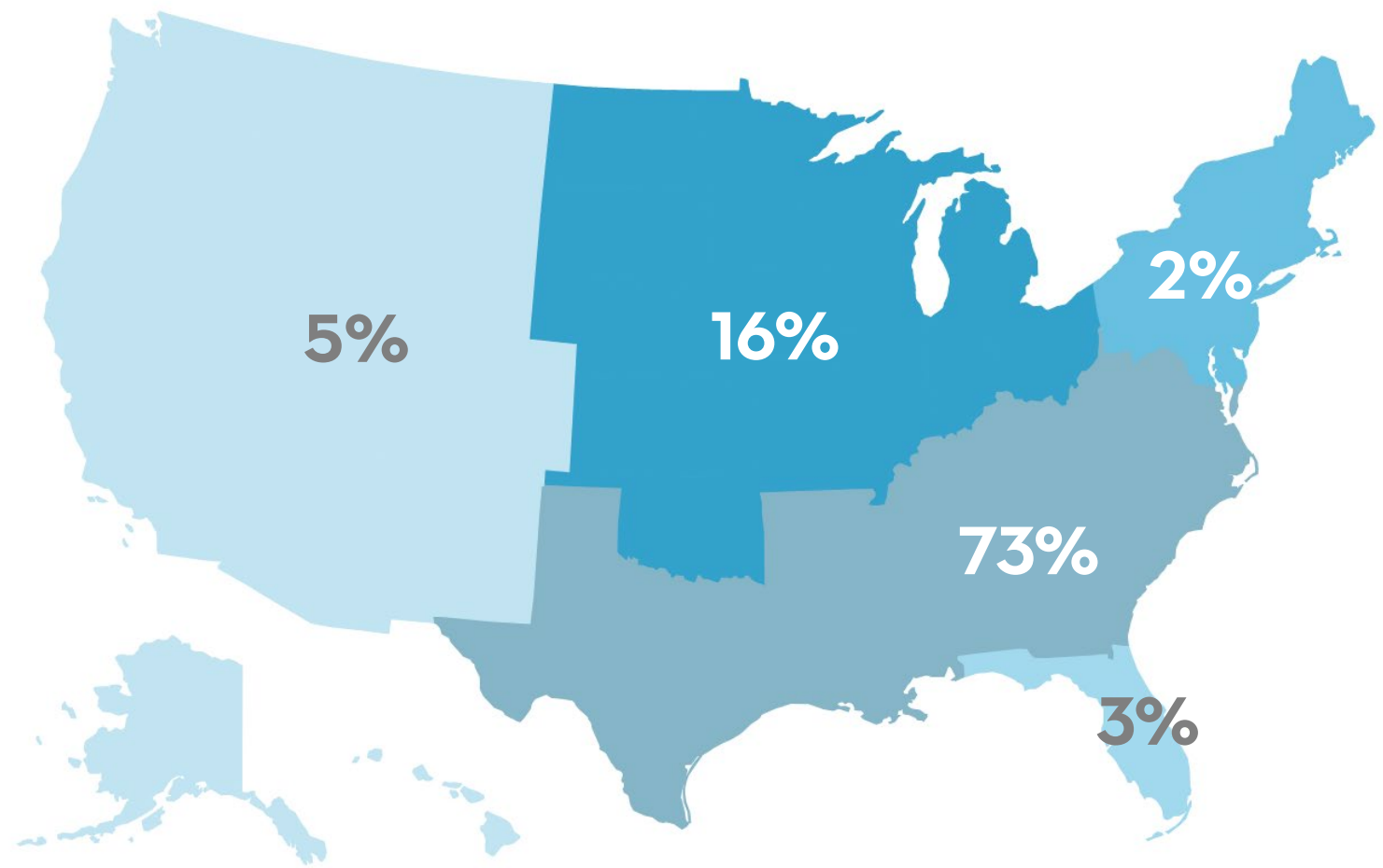
Pensacola International Airport



VISITOR JOURNEY: TRAVEL PARTY PROFILE

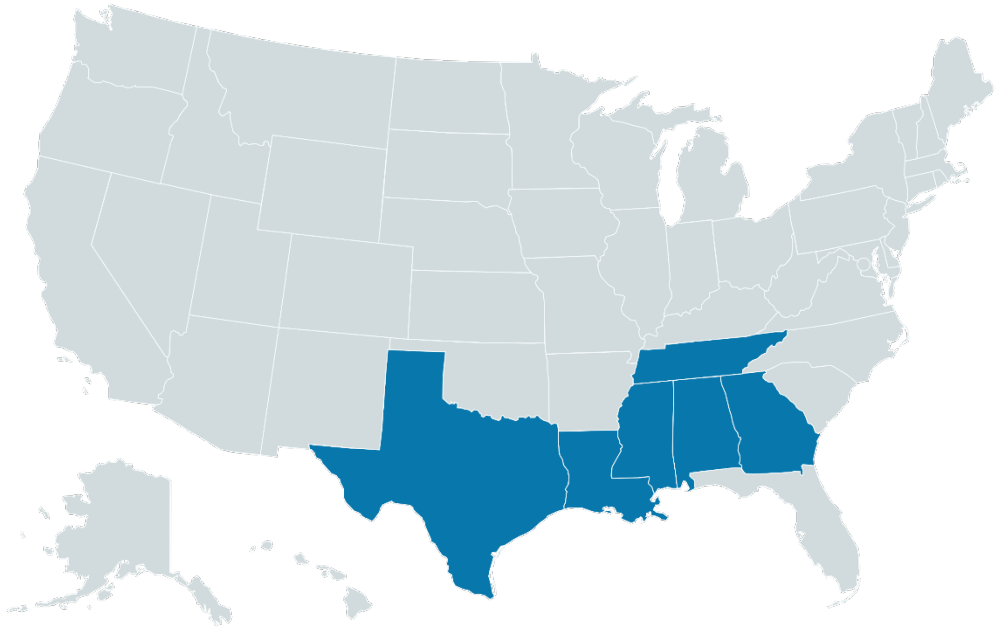


ORIGIN OF SUMMER VISITORS



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

ORIGIN OF SUMMER VISITORS



66% of visitors are from 6 states

- 16%** Texas
- 14%** Georgia
- 13%** Tennessee
- 9%** Alabama
- 7%** Louisiana
- 7%** Mississippi

49% of visitors are from 9 markets

- 12%** Atlanta
- 8%** Nashville
- 7%** Dallas-Fort Worth
- 4%** Birmingham
- 4%** New Orleans
- 4%** Houston
- 4%** Columbus-Tupelo-West Point
- 4%** Memphis
- 3%** Saint Louis

TRAVEL PARTY SIZE AND COMPOSITION

The typical visitor travels in a party composed of **5.3** people (5.6 people in 2023)



61% travel with at least one person under the age of 20 in their travel party (-3% points from 2023)



SUMMER VISITOR PROFILE

The typical Walton County Summer visitor:

- » **53** years old (52 years old in 2023)
- » Median household income of **\$144,400** (\$156,300 in 2023)
- » **76%** from the Southeast including Florida (+2% points from 2023)



VISITOR JOURNEY: TRIP EXPERIENCE



TOP ACCOMMODATIONS

51% Condos, rental houses, etc.



14% Personal home/condo



13% Friends and relatives



11% Hotel



LENGTH OF STAY

- » Visitors¹ spend **5.9** nights² in Walton County (5.6 nights 2023)
- » Visitors staying in paid accommodations spend an average of **6.2** nights² in Walton County (6.1 nights in 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

- » **13%** (consistent with 2023) are first-time visitors
- » **34%** (+4% points from 2023) have visited more than 10 times



TOP VISITOR ACTIVITIES*

Beach **91%**
(92% in 2023)



Shopping **71%**
(69% in 2023)



Restaurants **87%**
(86% in 2023)



Family time, reading, cooking **67%**
(65% in 2023)



Relax and unwind **78%**
(76% in 2023)



Biking, running **49%**
(47% in 2023)



*Multiple responses permitted.

BEACH SAFETY

- » **84%** of Summer visitors know there are flags posted along the beaches to indicate how safe it is to go into the water
- » **Over 4 in 5** Summer visitors are aware of the beach flag warning meanings
- » **67%** (+3% points from 2023) of Summer visitors are aware of the consequences of entering the Gulf during double red flag conditions



TRAVEL PARTY EXPENDITURES¹

- » The typical travel party spends **\$742** (\$819 in 2023) a day while in Walton County.
- » The typical travel party spends a total of **\$4,370** (\$4,600 in 2023) while visiting Walton County.
- » Compared to 2023, total trip expenditures per travel party decreased 5% despite a longer length of stay, with the largest decreases in Shopping (-11%) and Entertainment (-7%).
- » The decrease in spending reflects national trends of visitors prioritizing travel while exercising economic caution by spending less during trips.



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

VISITOR JOURNEY: POST TRIP EVALUATION



RATING AND LIKELIHOOD OF RETURNING TO WALTON COUNTY

- » Visitors give Walton County a rating¹ of **9.2 (consistent with 2023)** as a place to vacation
- » **Nearly 4 in 5 (consistent with 2023)** will definitely return to Walton County²

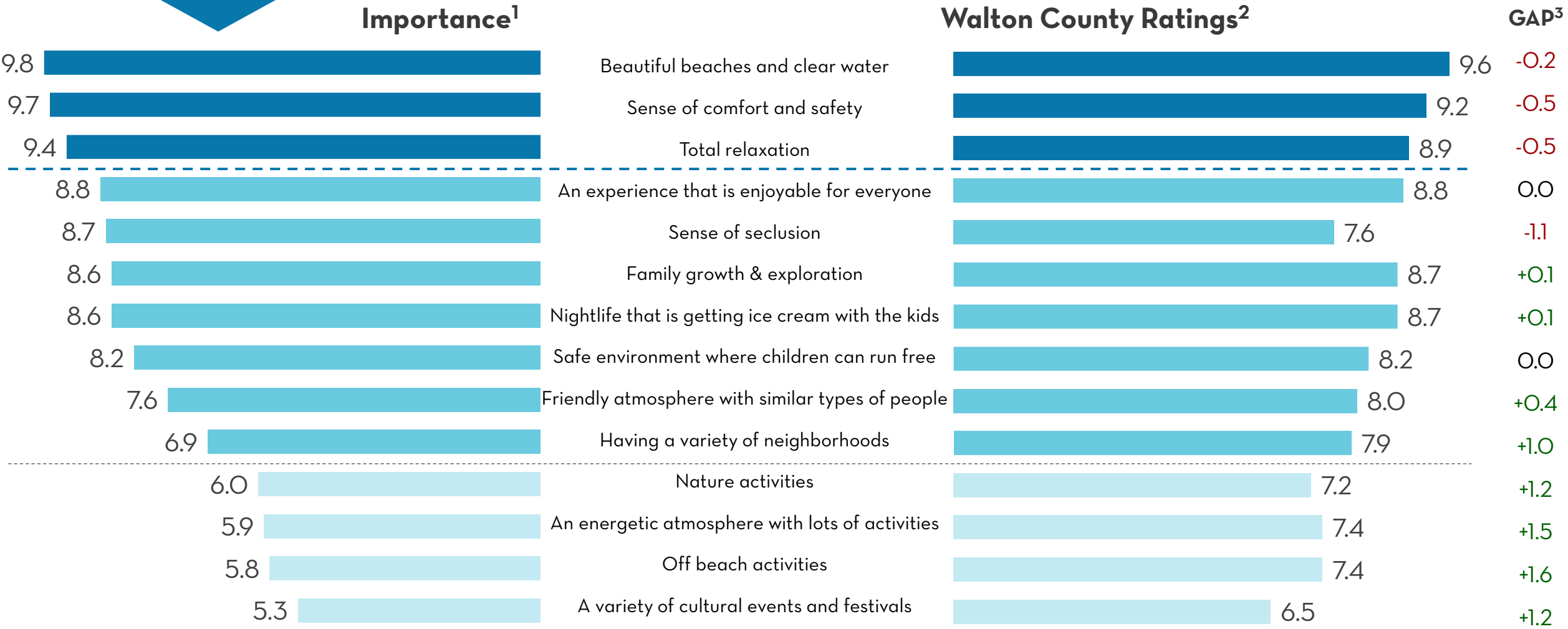


¹10 = Excellent; 1= Poor

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

1. Too crowded
2. Too expensive
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 9.8. Visitors rated WC as 9.6 on its beaches. Hence, the GAP is -0.2.

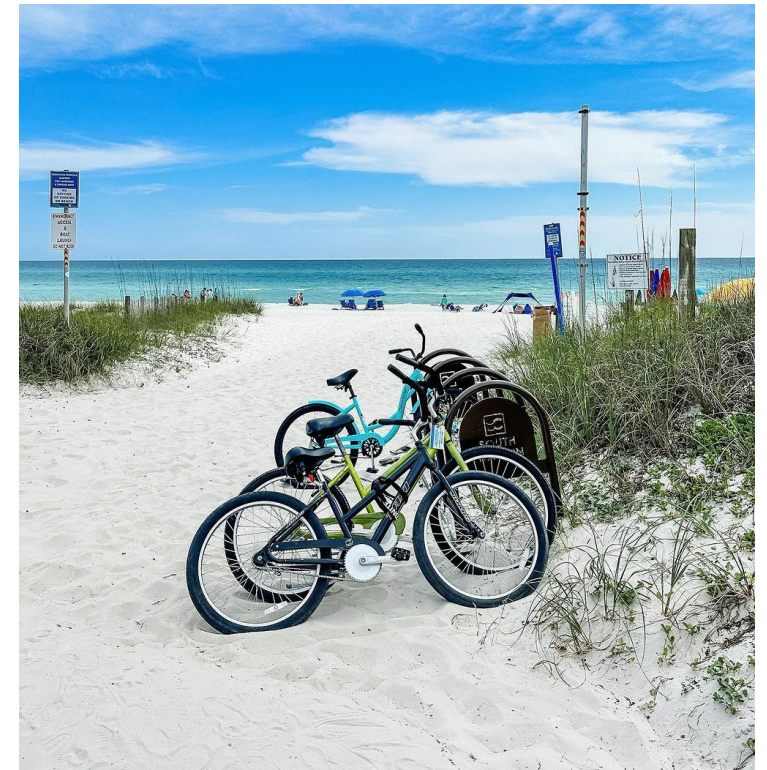
VISITOR DESCRIPTIONS OF WALTON COUNTY

"Great place for a family vacation. Our travel party ranged in age from 1 year to 73 and all enjoyed themselves."



"All the beauty of Caribbean beaches but with a wonderful sense of safety and none of the headaches of international travel."

"Like stepping back in time."



YEARLY COMPARISONS



VISITOR PROFILE - SUMMER 2023 VS. 2024

Visitor Metrics	Summer 2023	Summer 2024
Travel party	5.6	5.3
Kids <20	64%	61%
Median age	52	53
Estimated median household income	\$156,300	\$144,400
Drove	76%	75%
Nights spent	5.6	5.9
Direct expenditures (travel party for entire trip)	\$4,600	\$4,370
1st time visitor	13%	13%
Over 10 visits to Walton County	30%	34%

VISITOR PROFILE - SUMMER 2023 VS. 2024

Top Origin States	Summer 2023	Summer 2024
Texas	15%	16%
Georgia	13%	14%
Tennessee	12%	13%
Alabama	10%	9%
Louisiana	6%	7%
Mississippi	6%	7%

Origins - Regions	Summer 2023	Summer 2024
Southeast	70%	73%
Midwest	17%	16%
West	5%	5%
Florida	4%	3%
Northeast	3%	2%
International	1%	1%

VISITOR PROFILE - SUMMER 2023 VS. 2024

Top Visitor Activities	Summer 2023	Summer 2024
Beach	92%	91%
Restaurants	86%	87%
Relax and unwind	76%	78%
Shopping	69%	71%
Family time, reading, cooking	65%	67%
Biking, running	47%	49%
Water sports	35%	38%
Golf or tennis	23%	27%
Bars, nightclubs	21%	21%
Special events	22%	19%
Attractions	16%	17%
Hiking, nature walks, eco tours	14%	16%
State parks	12%	13%
Spas	7%	8%
Art galleries, museums, cultural events	6%	7%
Dune lakes	6%	7%
Business meetings, conferences	1%	1%
Other	2%	2%

VISITOR PROFILE - SUMMER 2023 VS. 2024

Visitor Metrics	Summer 2023	Summer 2024
Will return to Walton County	95%	95%
Rating for overall experience¹	9.2	9.2
Viewed Visitors Guide²	21%	23%
Planned trip 6+ months out	28%	25%
Used VisitSouthWalton.com	14%	12%
Used 1 of 16 beaches' websites	19%	15%
Use the term "South Walton"	12%	10%

DETAILED FINDINGS



VISITOR JOURNEY: PRE-VISIT



PLANNING CYCLE



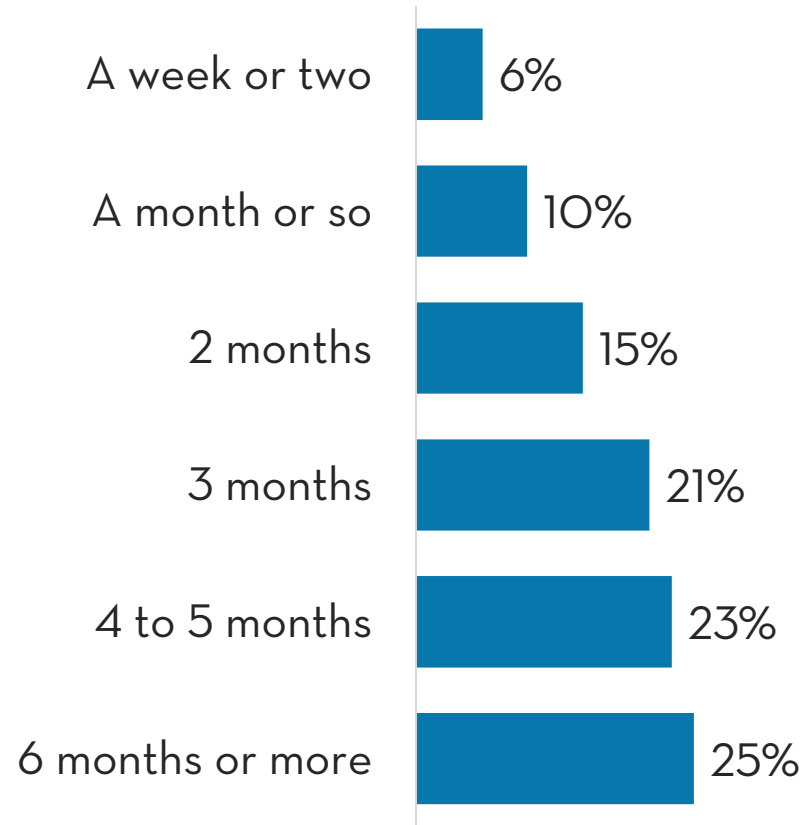
Nearly 7 in 10 visitors plan a Walton County Summer vacation at least **3 months** in advance



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



Average trip planning cycle begins **104 days** before the trip (106 days in 2023)



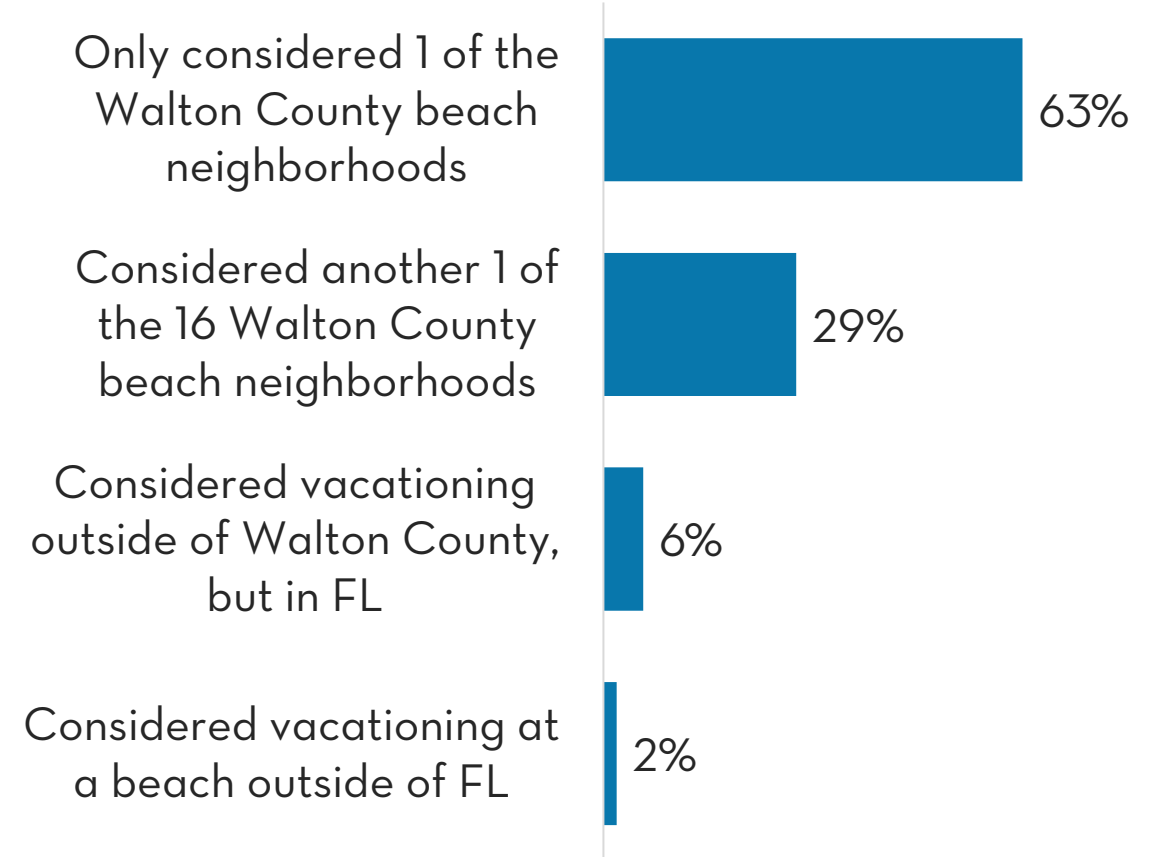
OTHER DESTINATIONS CONSIDERED



Over 3 in 5 (+3% points from 2023) Summer 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. Loyal visitors are more likely to refer to the destination as “South Walton” than first-time visitors.

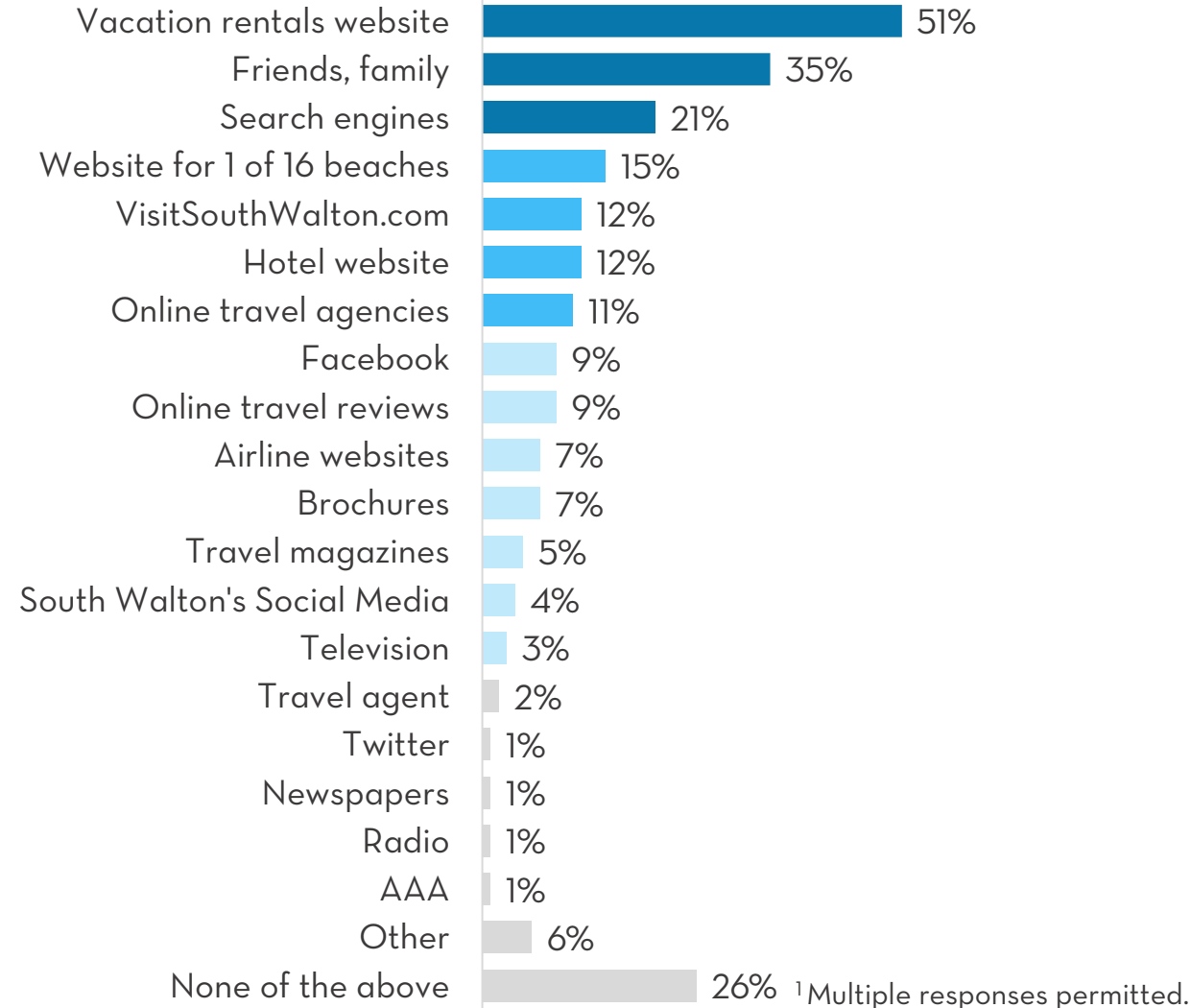


TRIP PLANNING SOURCES¹

Over half of 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

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



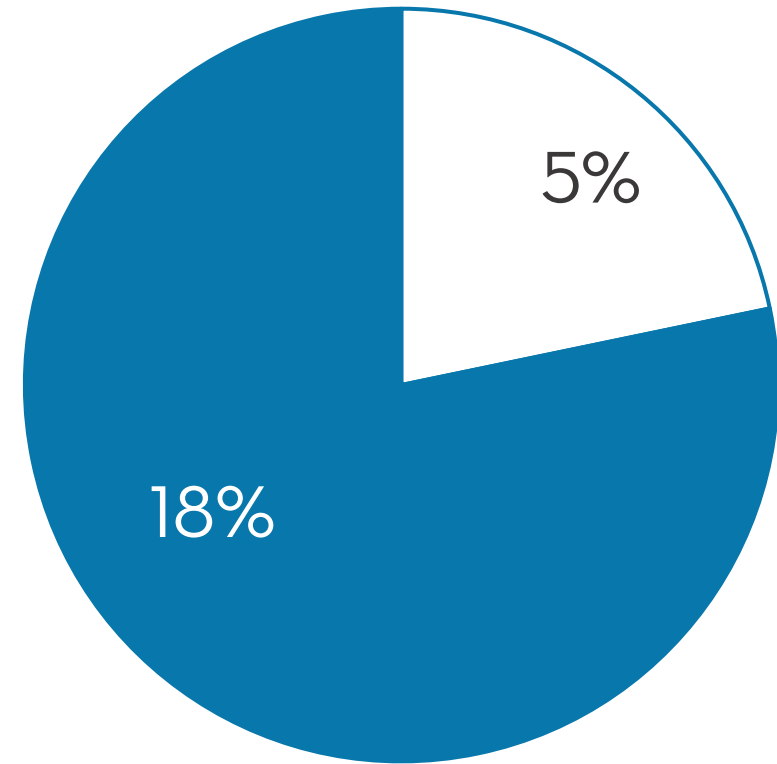
WALTON COUNTY VISITOR GUIDE



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



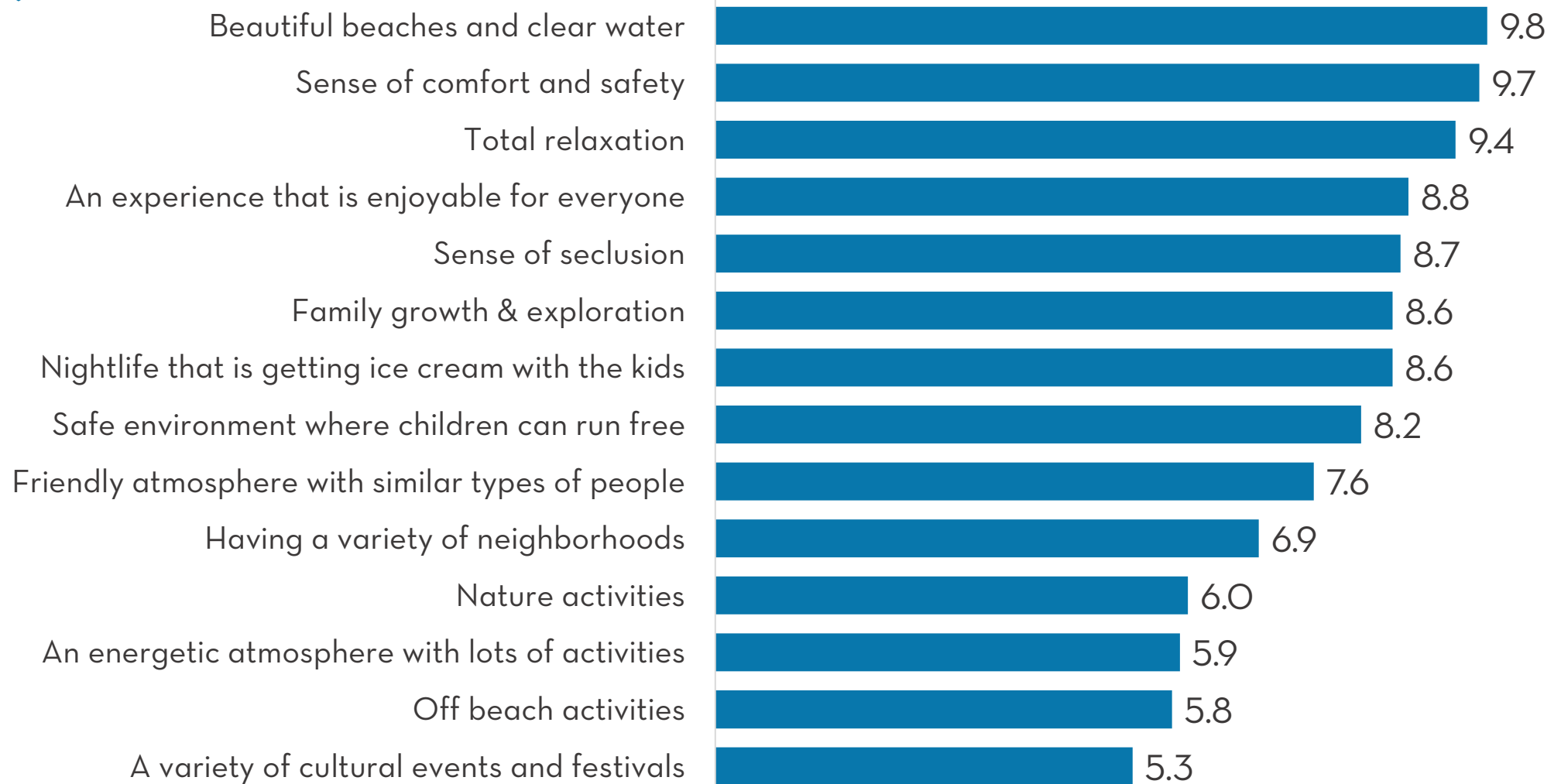
Summer visitors give the Visitors Guide a rating of **8.6 out of 10¹** (+0.2 points from 2023)



□ 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.

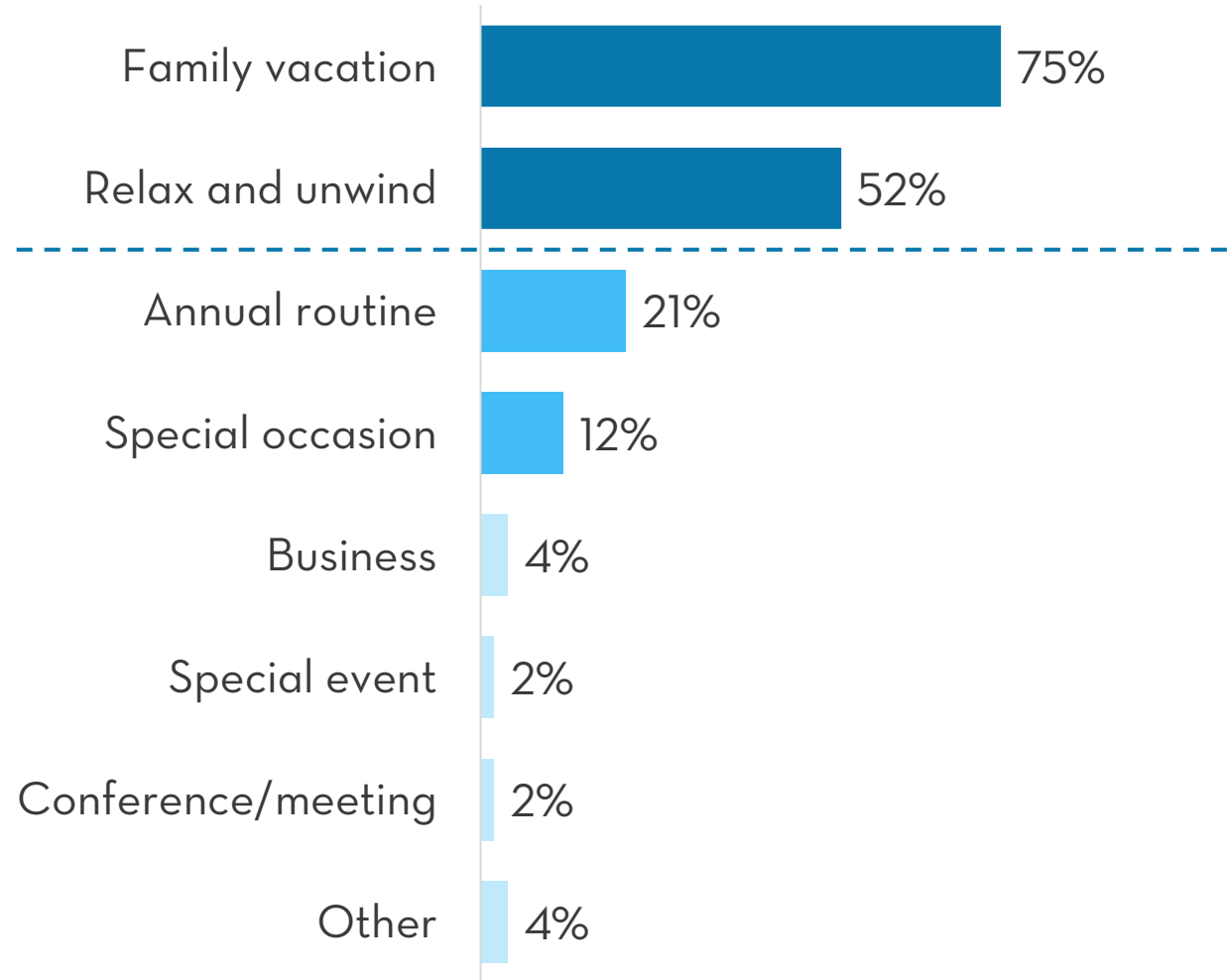
REASONS FOR VISITING¹



3 in 4 visitors come to Walton County for a **family vacation**



Over half of Summer visitors come to **relax and unwind**



WALTON COUNTY PROMOTIONS¹



23% (-3% points from 2023) of Summer visitors recall advertising, promotions, or travel stories for Walton County

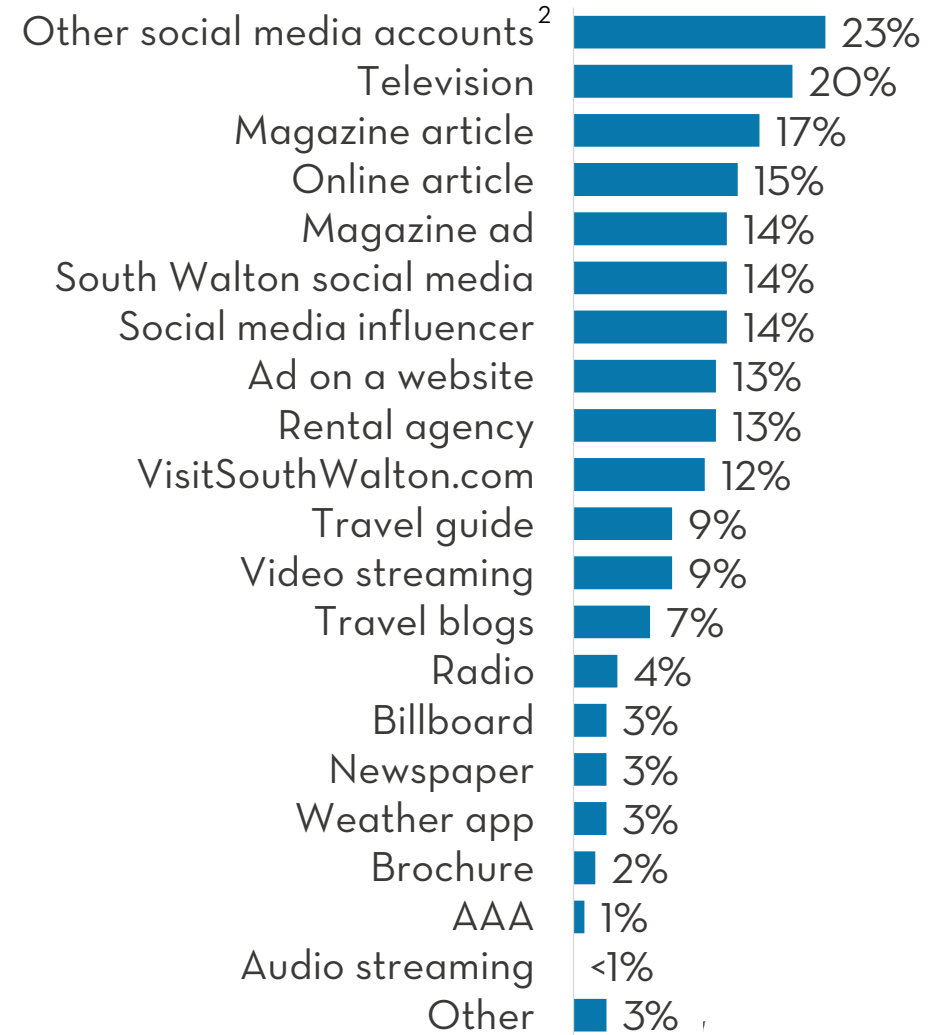


This information influences **7%** (consistent with 2023) of all visitors to visit Walton County



23% (+2% points from 2023) Summer visitors recall information about the destination on **other social media accounts²**

Base: **23%** of visitors who recall advertising



¹Multiple responses permitted.

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

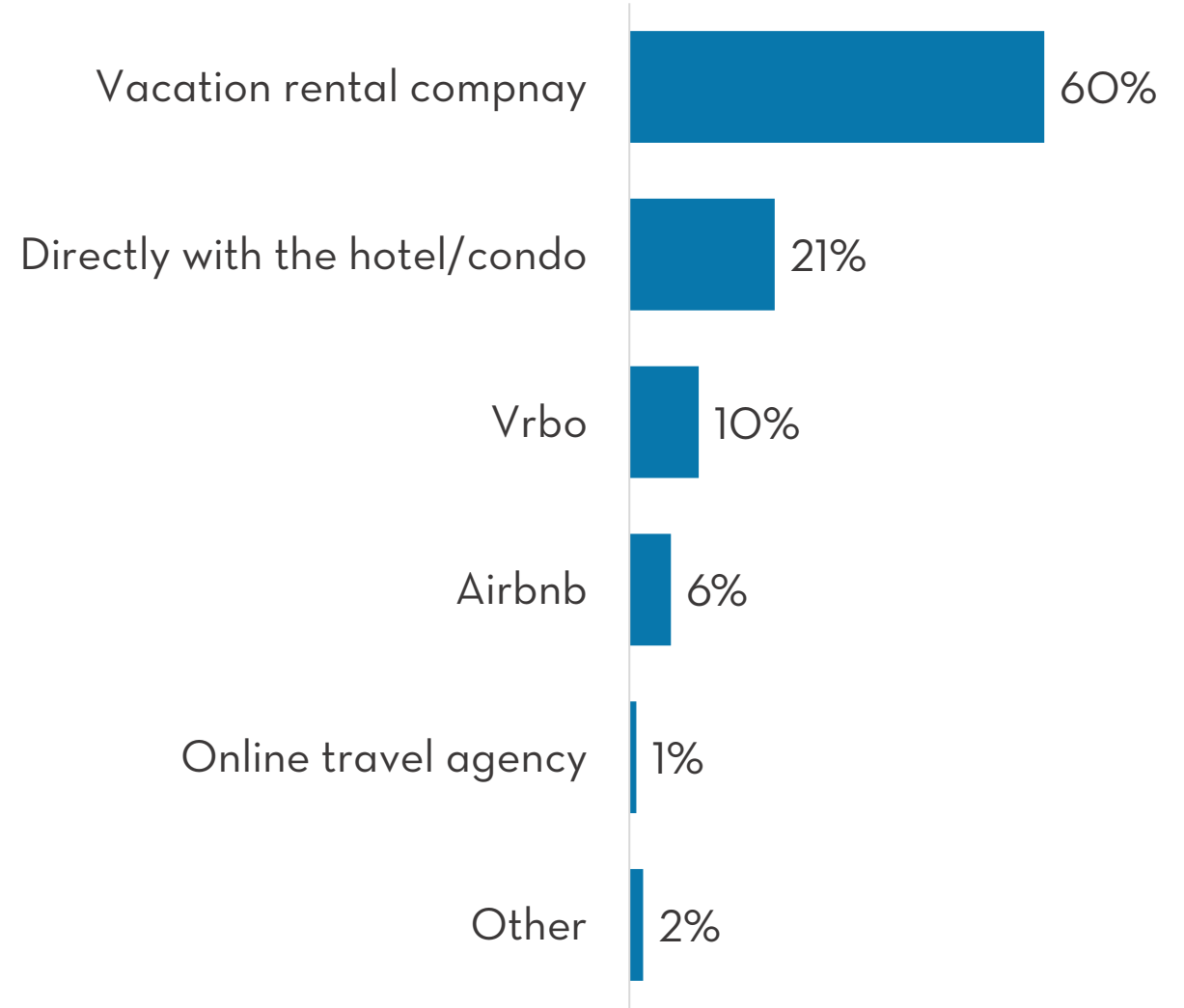
BOOKING ACCOMMODATIONS



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



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



VISITOR TRANSPORTATION

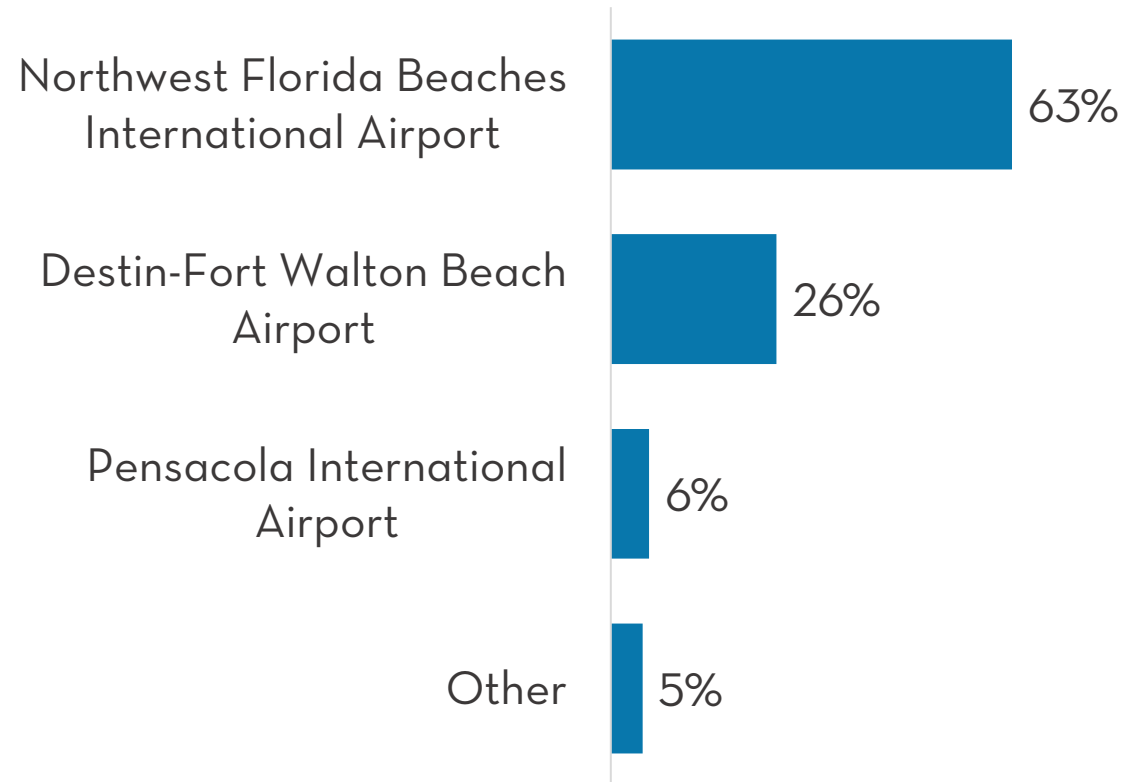


75% (-1% points from 2023) of Summer visitors drive to Walton County



28% (-3% points from 2023) of those who drive are aware that there are direct flights from their city to the Walton County area, and **27%** are not sure if there are direct flights available

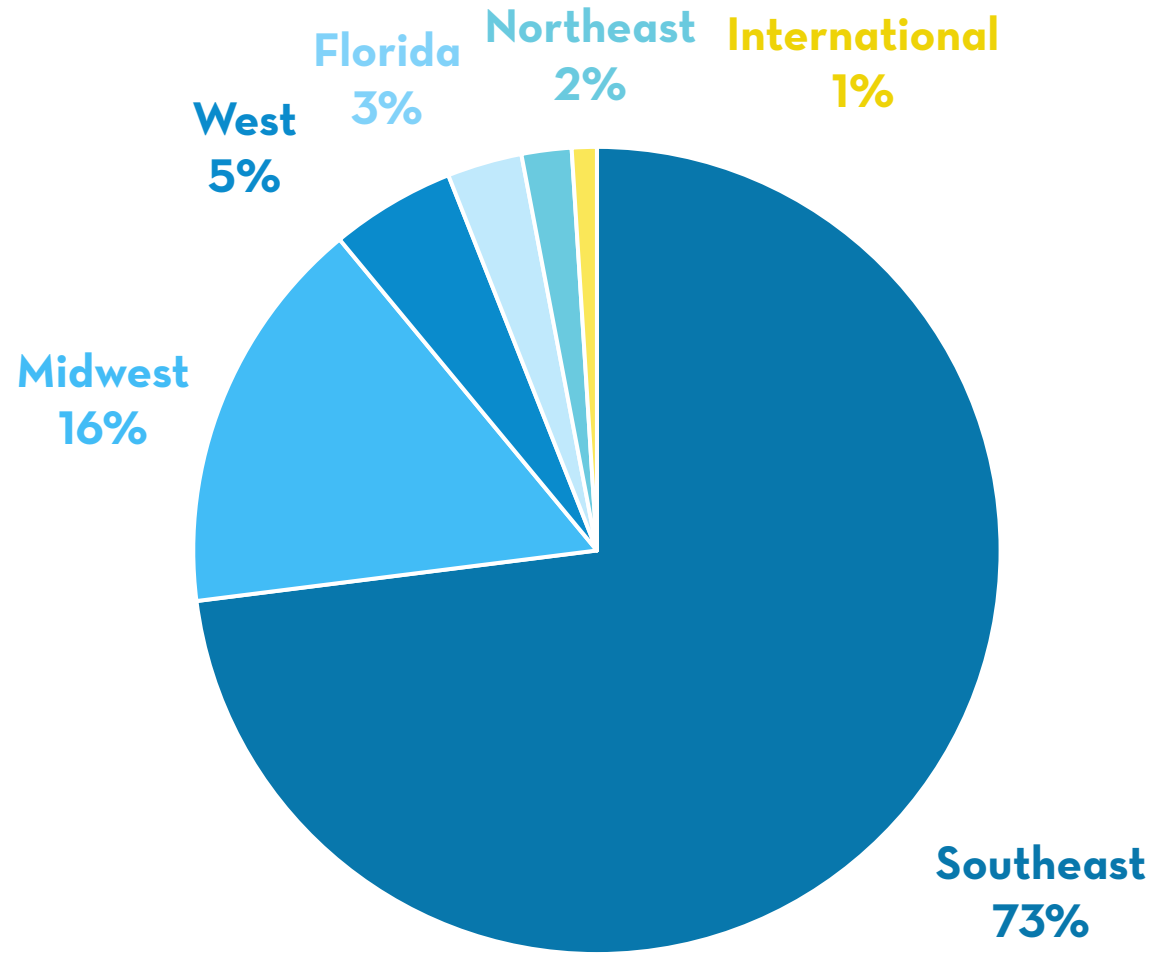
25% who **fly** use the following airports:



VISITOR JOURNEY: TRAVEL PARTY PROFILE

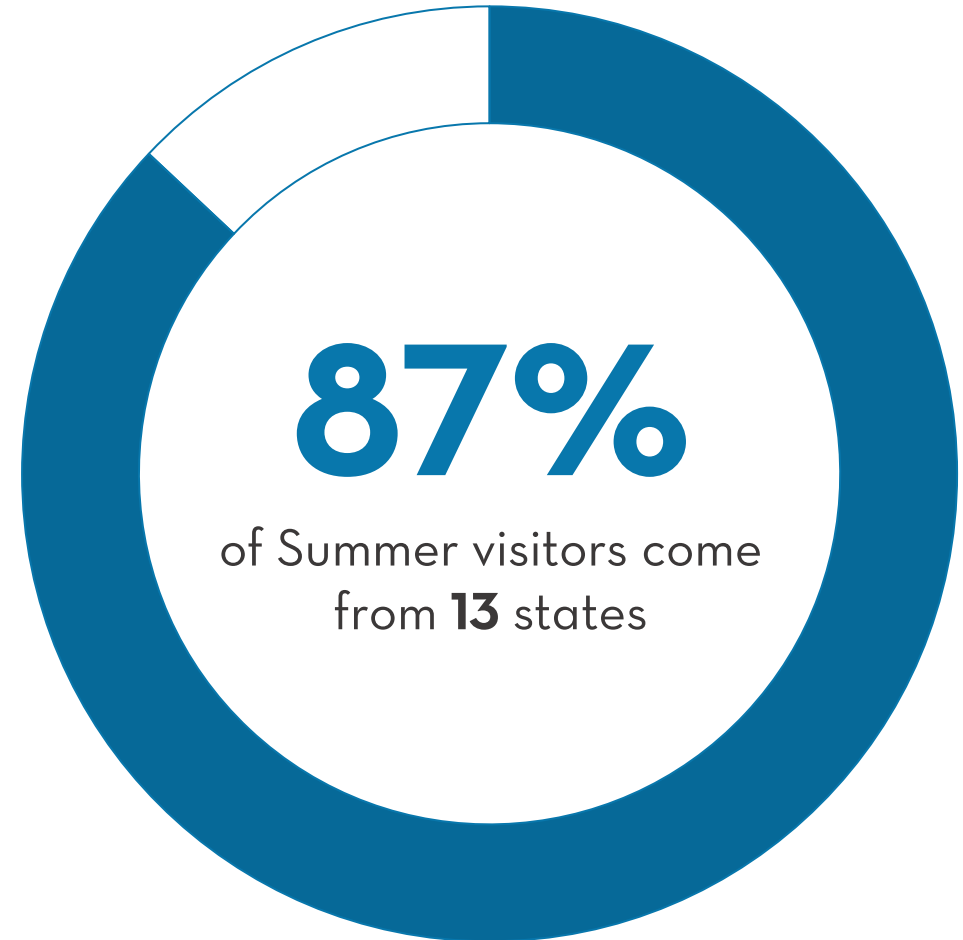


ORIGIN OF SUMMER VISITORS



ORIGIN OF SUMMER VISITORS

State	% of Visitors
Texas	16%
Georgia	14%
Tennessee	13%
Alabama	9%
Louisiana	7%
Mississippi	7%
Arkansas	3%
Florida	3%
Illinois	3%
Kentucky	3%
Missouri	3%
Ohio	3%
Oklahoma	3%



ORIGIN OF SUMMMER VISITORS

12% (consistent with 2023) of all visitors come from the **Atlanta** market

8% (+1% points from 2023) visitors are from the **Nashville** market

15% of all visitors come from four markets in Texas: **Dallas-Fort Worth, Houston, San Antonio,** and **Austin**

Top Origin Markets	% of Visitors
Atlanta	12%
Nashville	8%
Dallas-Fort Worth	7%
Birmingham	4%
New Orleans	4%
Houston	4%
Columbus-Tupelo-West Point	4%
Memphis	4%
Saint Louis	3%
Little Rock-Pine Bluff	2%
Mobile-Pensacola	2%
Chicago	2%
San Antonio	2%
Austin	2%
Columbus, OH	1%

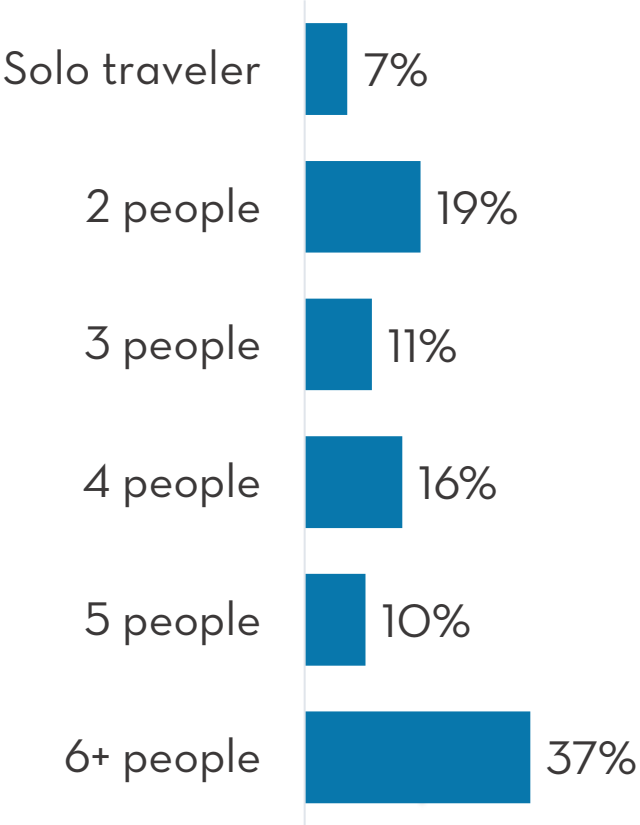
TRAVEL PARTY SIZE AND COMPOSITION



Visitors travel in a party composed of **5.3** people (5.6 people in 2023)



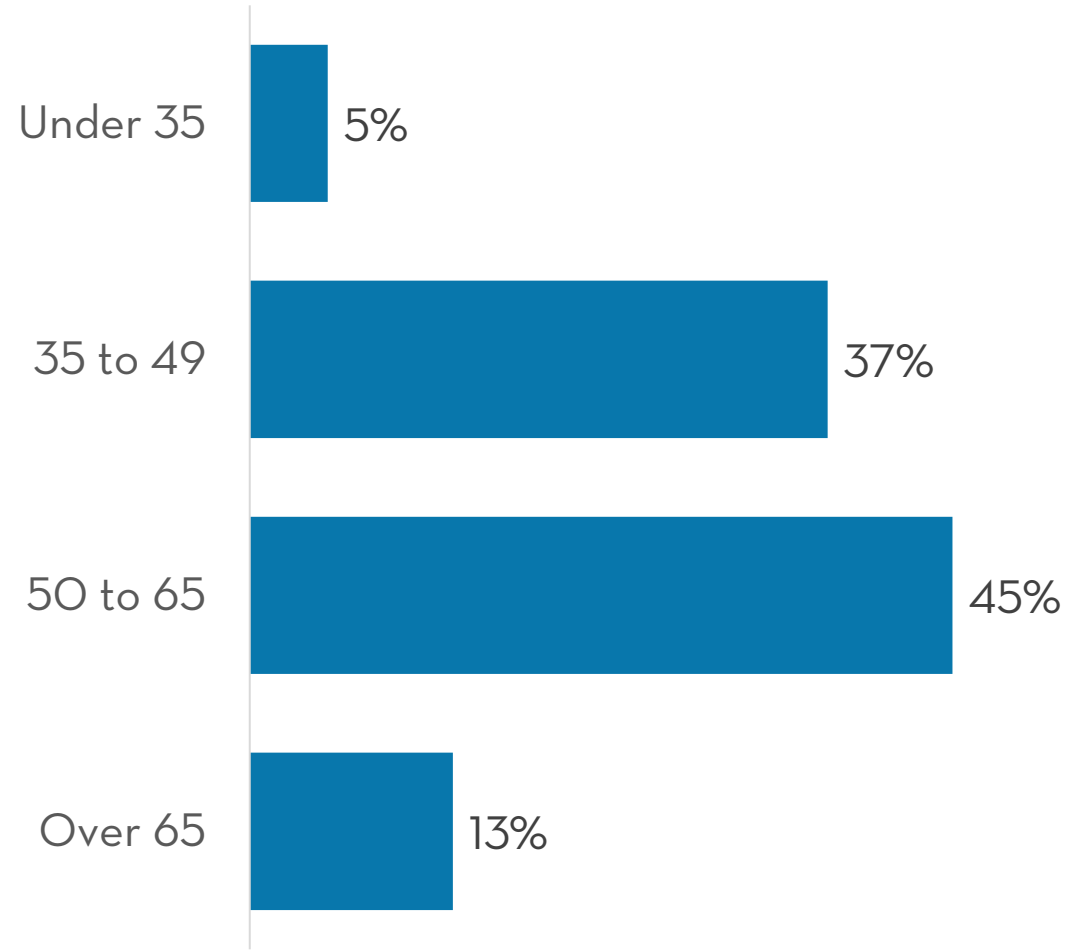
61% (-3% points from 2023) of visitors travel with children under the age of 20




AGE OF SUMMER VISITORS



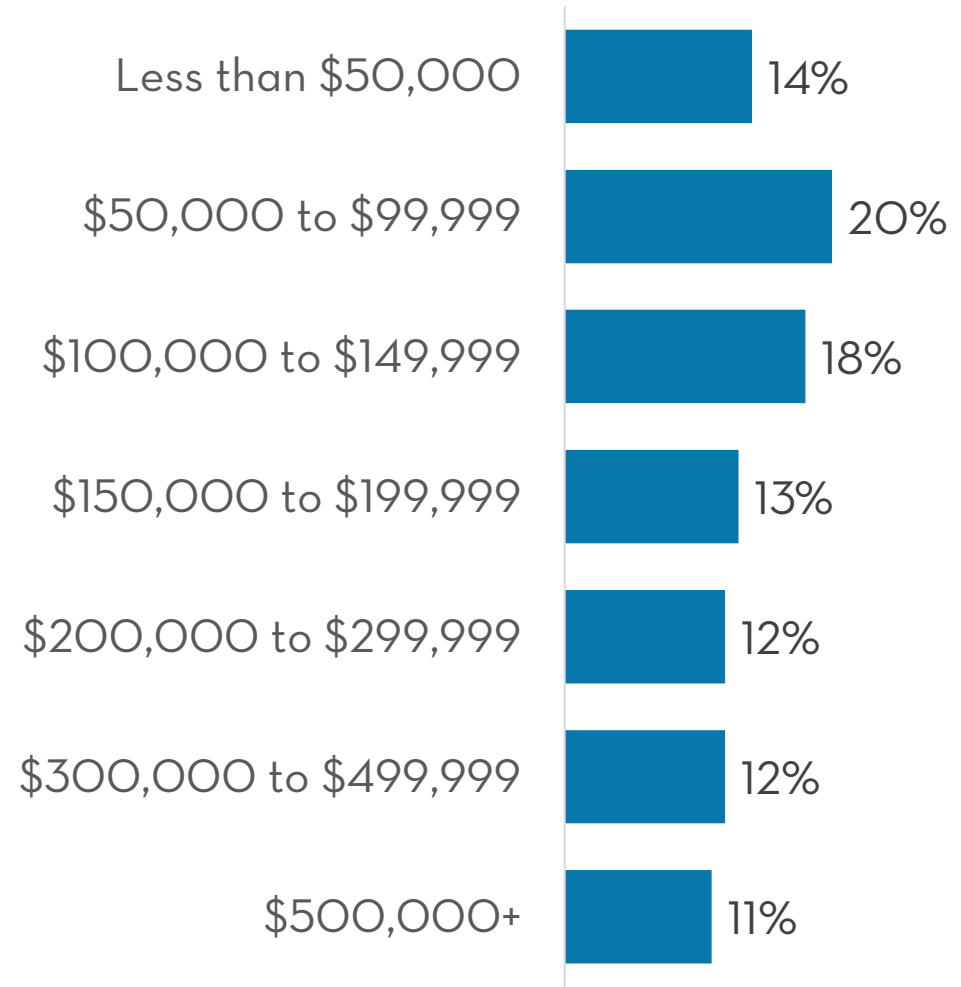
Median age of Summer visitors is **53 years old** (52 years old in 2023)



TOTAL HOUSEHOLD INCOME IN 2023



Summer visitors have a **median** household income of **\$144,400** (\$156,300 in 2023), while estimated **average** household income is **\$200,300** (\$203,800 in 2023)



VISITOR JOURNEY: TRIP EXPERIENCE



VISITOR ACCOMMODATIONS



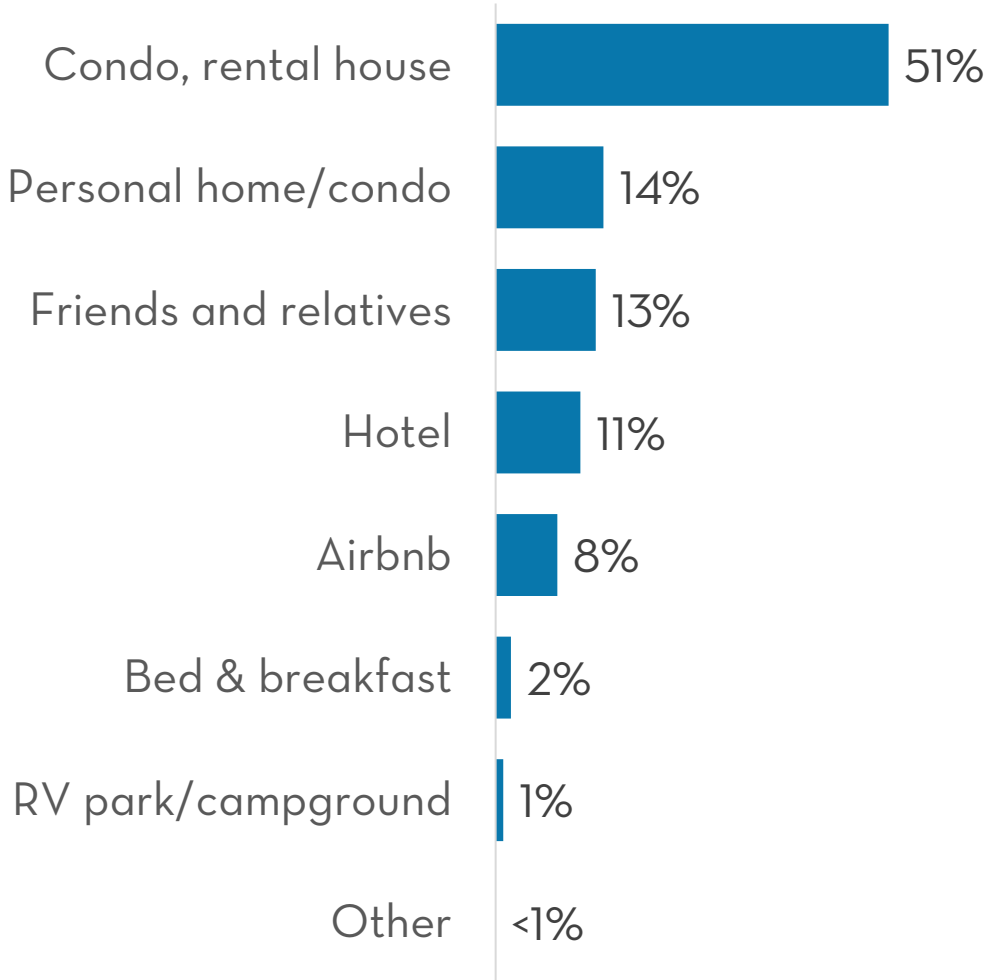
Over half of Summer visitors stay in a condo or rental house



14% visitors stay in their personal home or condo



13% stay with friends and relatives while in Walton County



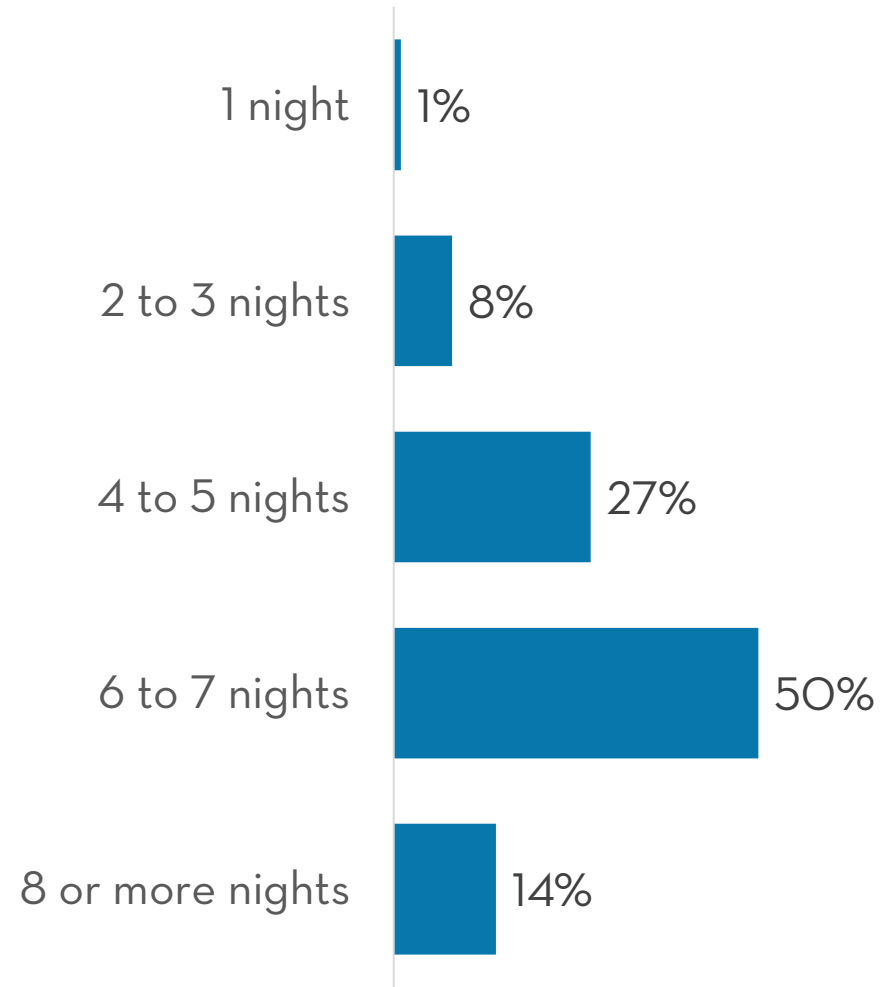
LENGTH OF STAY



Summer visitors¹ spend an average of **5.9** nights² in Walton County (**5.6 nights in 2023**)



Summer visitors staying in paid accommodations spend an average of **6.2** nights² in Walton County (**6.1 nights in 2023**)



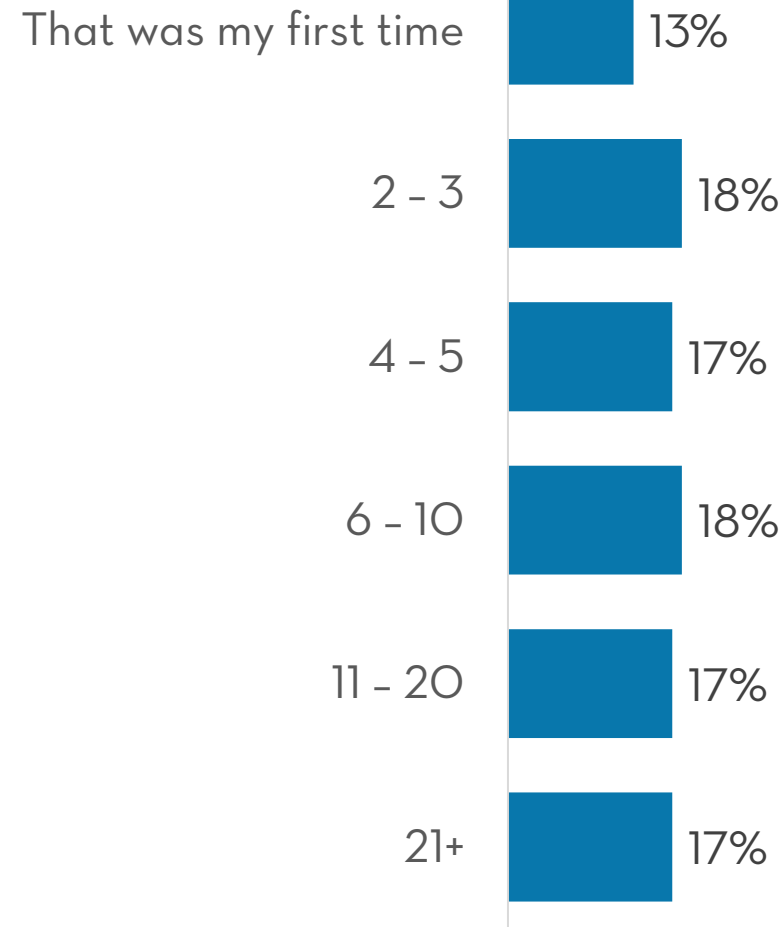
¹Includes visitors staying paid accommodations, non-paid, and day trippers.

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

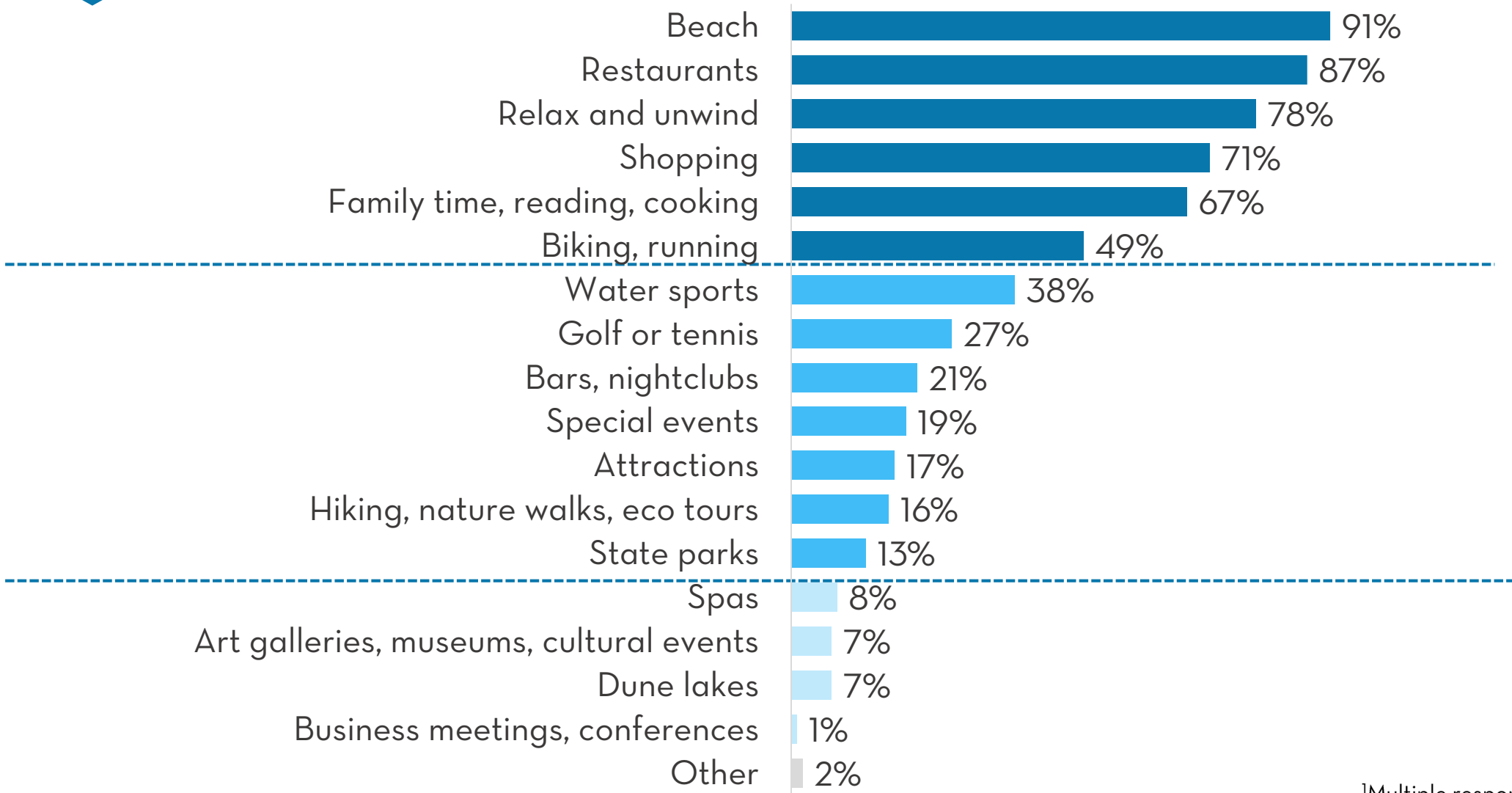
NUMBER OF VISITS TO WALTON COUNTY

13% of Summer visitors are visiting for the first time

34% of Summer visitors have visited Walton County more than 10 times



VISITOR ACTIVITIES¹

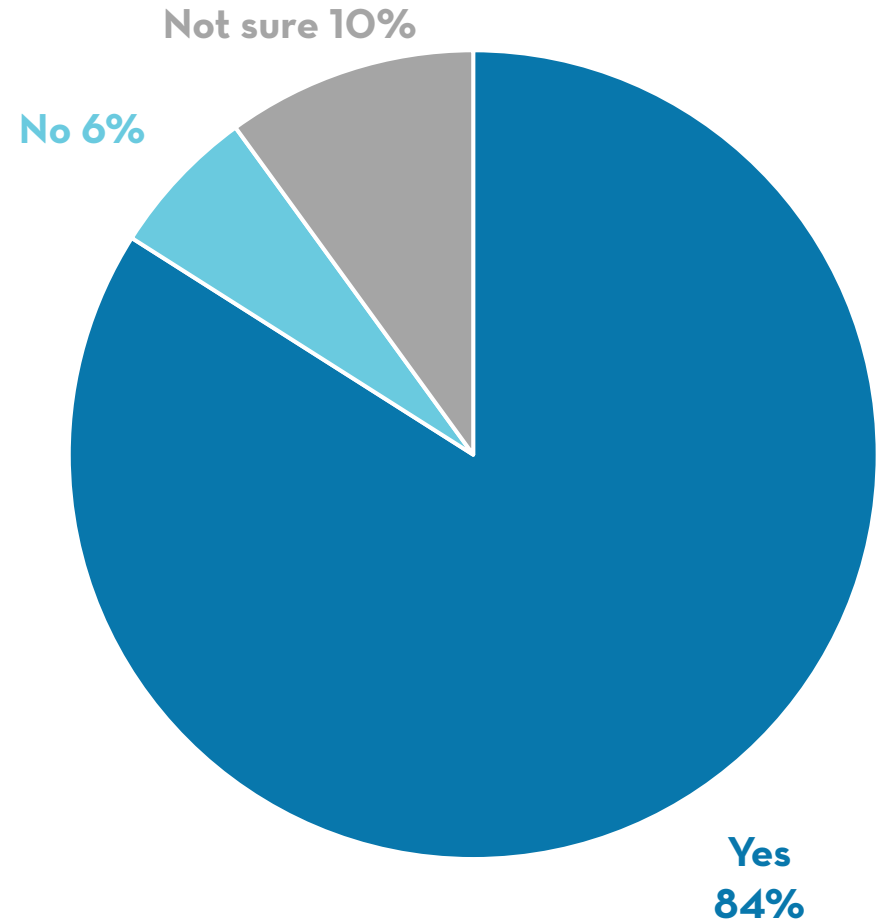


¹Multiple responses permitted.

BEACH SAFETY



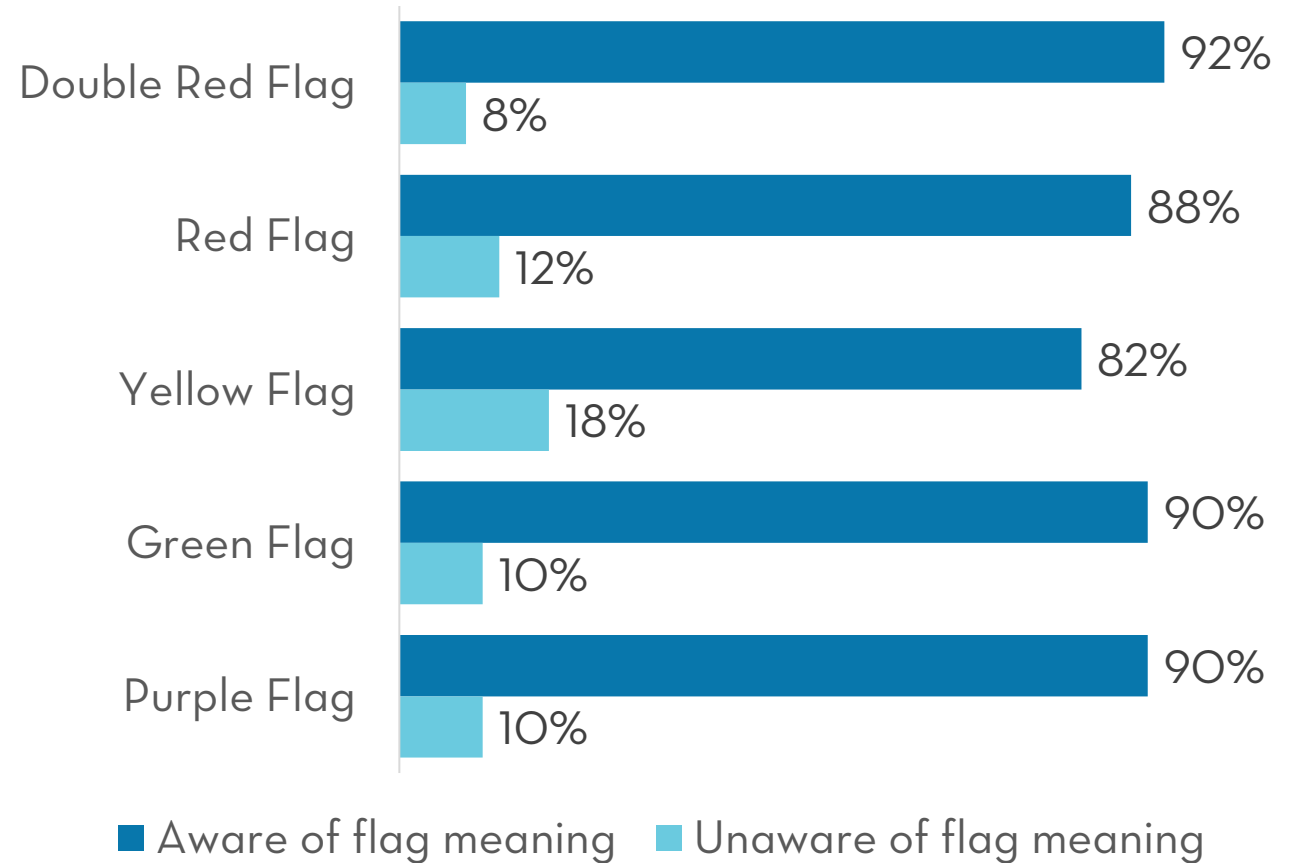
84% of Summer visitors know there are flags posted along the beaches to indicate how safe it is to go into the water



BEACH FLAG AWARENESS

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

67% (+3% points from 2023) of Summer 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 spend **\$742** (\$819 in 2023) a day while in Walton County.
- » The typical travel party spends a total of **\$4,370** (\$4,600 in 2023) while visiting Walton County.
- » Compared to 2023, total trip expenditures per travel party decreased 5% despite a longer length of stay, with the largest decreases in Shopping (-11%) and Entertainment (-7%).
- » The decrease in spending reflects national trends of visitors prioritizing travel while exercising economic caution by spending less during trips.

Spending Category ¹	Average Daily Expenditure	Total Trip Expenditure
Accommodations	\$299	\$1,760
Restaurants	\$144	\$850
Groceries	\$68	\$400
Shopping	\$116	\$680
Entertainment	\$49	\$290
Transportation	\$49	\$290
Other	\$17	\$100
Total	\$742	\$4,370

¹ Includes overnight visitors and day trippers.

VISITOR JOURNEY: POST-TRIP EVALUATION



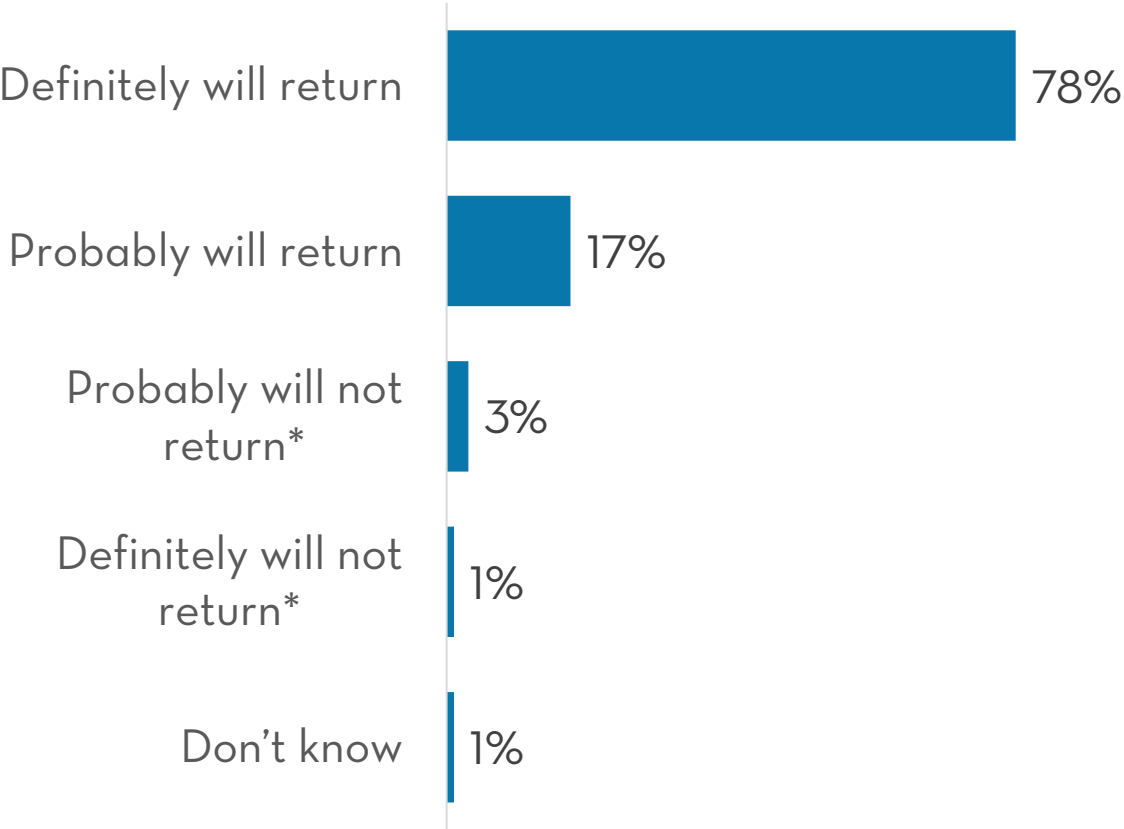
RATING AND LIKELIHOOD OF RETURNING TO WALTON COUNTY



Visitors gave Walton County a rating¹ of **9.2** (consistent with 2023) as a place to vacation



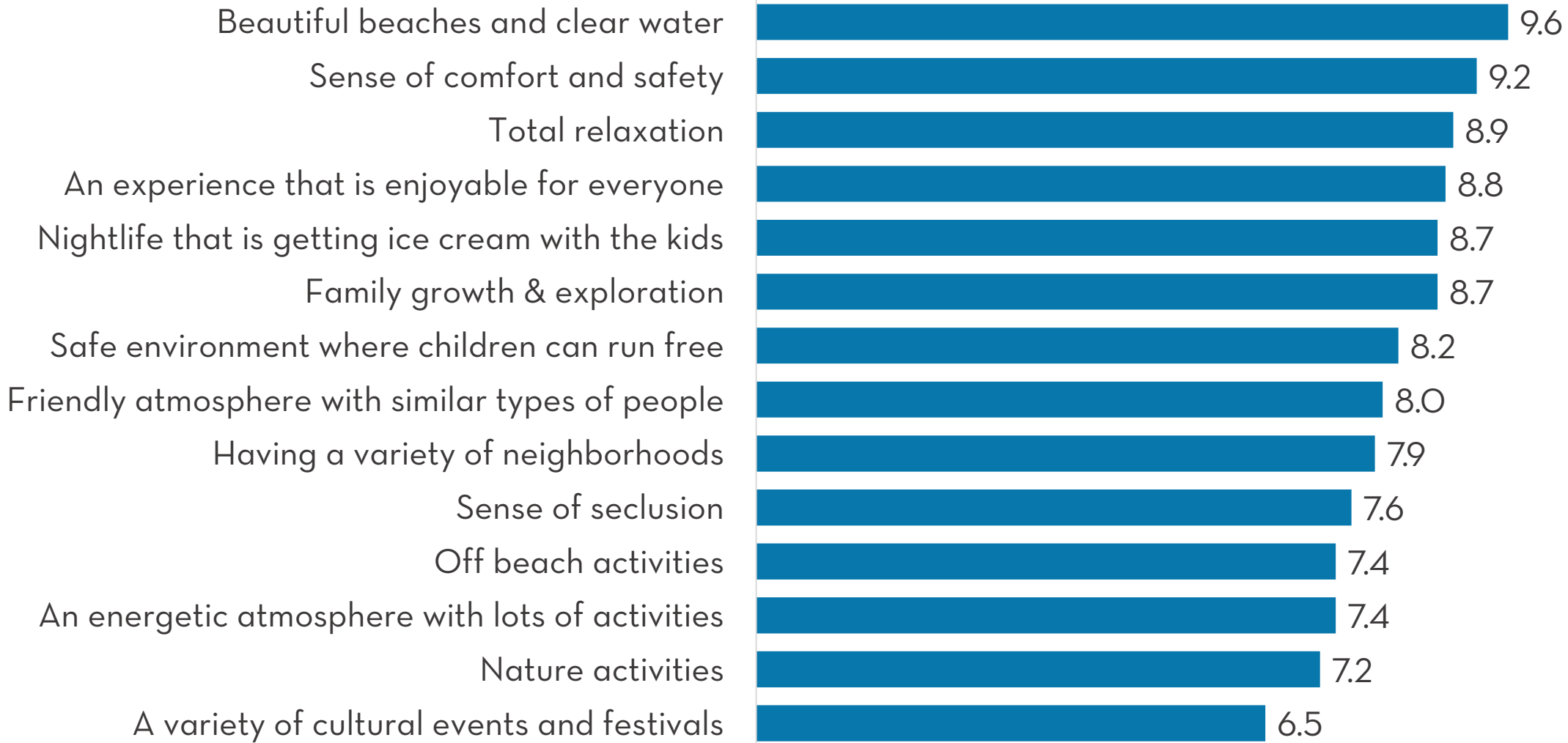
Nearly 4 in 5 Summer visitors will definitely return to Walton County



¹10 = Excellent; 1= Poor

*4% of all visitors will not return to Walton County for the following reasons:
1. Too crowded 2. Too expensive 3. 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.

AREA DESCRIPTIONS



“You must go! It is not only beautiful, but also has everything you could possibly want on a vacation. Such a fun place to be with everything right there for you to enjoy in one place. The beach and water were like being in Bahamas. Gorgeous! We will definitely be back!”

“Beautiful! Perfect beaches, quaint peaceful neighborhoods, wonderfully preserved nature spaces, excellent amenities, bike and walking friendly, great shops and restaurants. Well kept.”

“Very beautiful with great beaches. Good restaurants. Good golf. Beautiful communities that are unique.”

“Small towns with beautiful beaches and emerald green water with good seafood restaurants and bars with live music.”

“Beautiful, modern community with lots of activities and restaurants.”

“Family-oriented, beautiful beaches, a fabulous place to visit.”

AREA DESCRIPTIONS



“Great place for a family vacation. Our travel party ranged in age from 1 year to 73 and all enjoyed themselves.”

“Like stepping back in time.”

“The place to go with your family. Amazing beaches, lots to do for everyone and great food!”

“Upscale, safe, fun place to travel with great food and wonderful beaches.”

“The most beautiful beaches in the U.S. and the friendliest neighborhoods!”

“Beautiful beaches and lots to do for kids.”

“Safe, relaxing, lovely get-a-way. Small town feel.”

“Idyllic family-friendly beach community.”

AREA DESCRIPTIONS



“Magical family destination with beautiful beaches.”

“Visually stunning, relaxing, family oriented, and great food. Tons of nature opportunities.”

“Visiting South Walton is unique and not like your typical Florida beach vacation with high rises, businesses, and fast paced living built right up to the beach. It's like taking a classic Mediterranean beach vacation without having to travel halfway around the world.”

“All the beauty of Caribbean beaches but with a wonderful sense of safety and none of the headaches of international travel.”

“Paradise!”

“Great vibe. Relaxing. Upscale but not stuffy. Beautiful beaches and good restaurants.”

FEELINGS ASSOCIATED WITH WALTON COUNTY



"I love the feeling of my family coming closer together."

"When we are here, we don't have a worry in the world."

"Happy to get here and sad when we have to leave."

"Blissful!"

"I feel a sense of pride."

"That excitement of getting to the beach on the first day here."

"The feeling of tranquility I get listening to the sound of waves gently washing ashore."

"Hard to be down when on sandy beaches."

WALTON COUNTY TOURISM

Summer 2024 Visitor Tracking Study June - August 2024

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