

# WALTON COUNTY TOURISM

**Summer 2025 Visitor Tracking Study**

June - August 2025



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## Visitor Tracking Study

This report is based on 783 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 2025.

# ECONOMIC IMPACT SUMMARY



# TOURISM SNAPSHOT: KEY PERFORMANCE INDICATORS



**1,928,600**

TOTAL  
VISITORS

vs. 2024

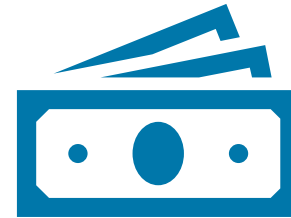
↓ **6.2%**



**1,241,100**

ROOM  
NIGHTS

↓ **3.3%**



**\$1,558,484,300**

DIRECT  
SPENDING

↓ **6.3%**



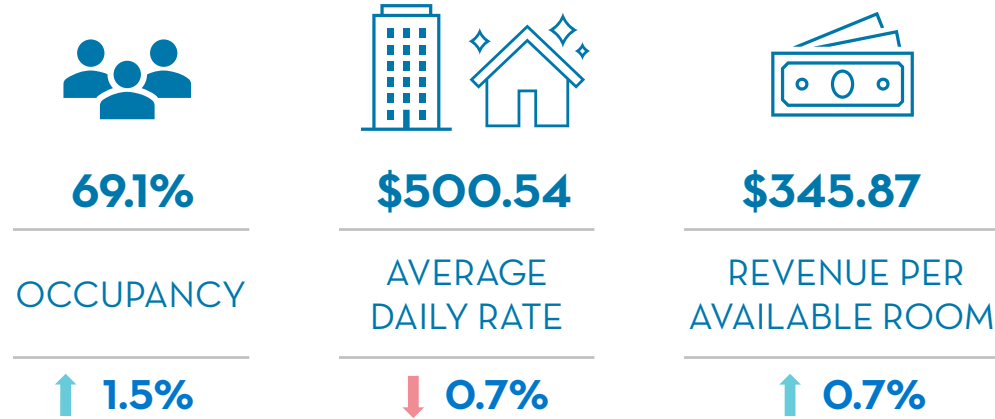
**\$29,588,853**

TOURISM  
DEVELOPMENT TAX

↑ **1.4%**

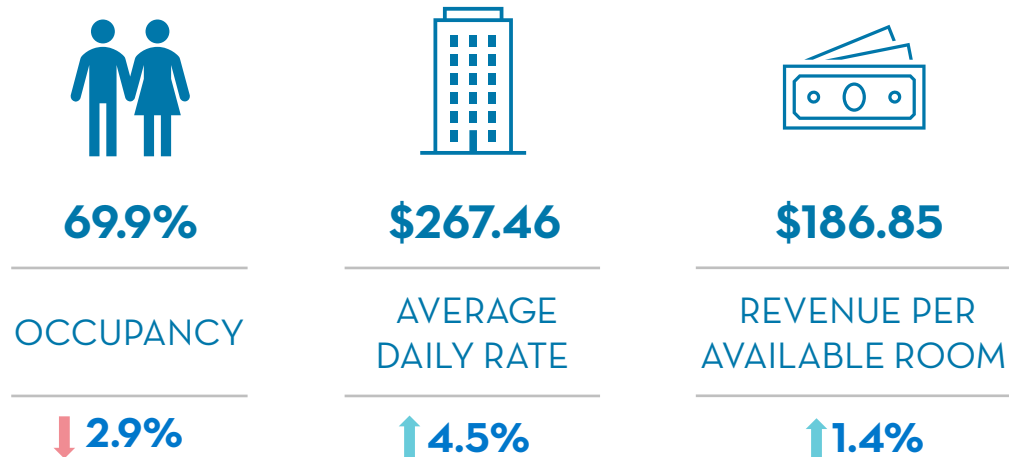
# TOURISM SNAPSHOT: LODGING METRICS<sup>1</sup>

## COMBINED

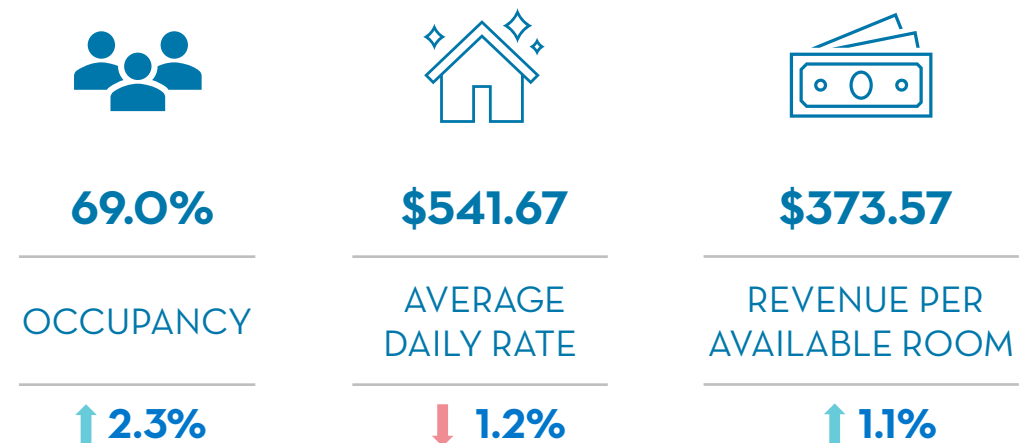


<sup>1</sup>Airbnb (effective April 30, 2025) and Vrbo (effective May 30, 2025) have updated how rates are quoted through their platforms. The ADR now includes cleaning fees, platform service fees, and applicable discounts (e.g., weekly or monthly stay discounts). Therefore, the ADR of vacation rentals may appear inflated in YOY comparisons now that Key Data is capturing the inclusive price (excluding taxes) rather than the base accommodation rate.

## HOTELS<sup>2</sup>



## VACATION RENTALS<sup>3</sup>



# SPECIAL ATTRIBUTES OF THE SUMMER SEASON

## Insights:

- » Summer is Walton County's biggest season, consistently contributing nearly half of the annual visitors to Walton County.
- » Travel parties spend more per day in Summer but spend less per day per visitor due the high travel party size.
- » Summer is the season of the family vacation in Walton County with the highest travel party size and the highest percent of visitors traveling with children compared to the other seasons.

## Recommendations:

- » Continue to build on the family-friendly luxury brand by highlighting family focused accommodations, large rental properties and multi-generational family experiences.
- » Encourage summer visitors to return during the shoulder seasons to experience less crowding.

Visitor Metrics	Typical Summer Visitor <sup>1</sup>	Typical Visitor <sup>1</sup>
Daily spend per travel party	\$791	\$785
Daily spend per visitor	\$141	\$156
Travel Party Size	5.3	5.0
Travel with children	64%	54%

<sup>1</sup>Typical Summer visitor is an average of Summer figures since Summer 2022. Typical visitor is an average of annual figures for 2022, 2023, and 2024.

# VISITOR PROFILE SUMMARY



# SUMMER 2025 VISITOR PROFILE



**53**

Median Age

**15%**

First-time Visitor

**\$145,000**

Median Household Income

**65%**

Traveled with Children  
under the age of 20

**5.1**

Travel Party Size

**6.3**

Length of Stay

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

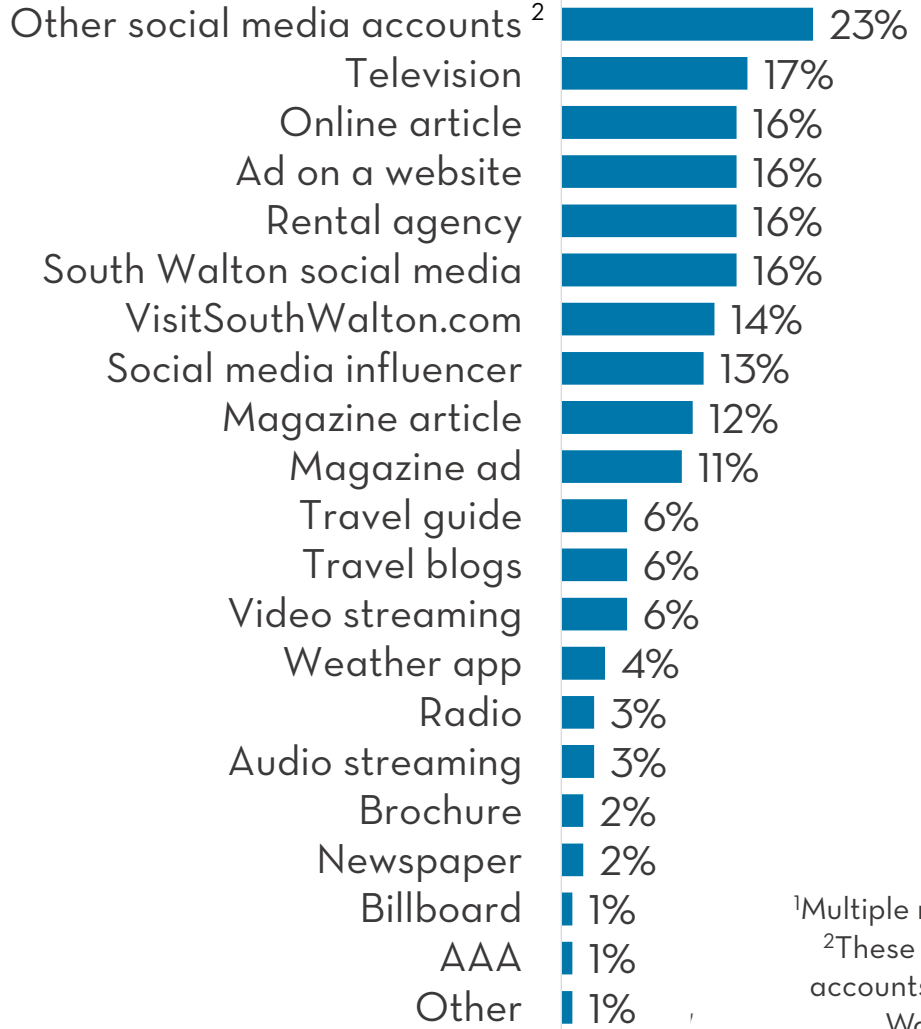
Base: **25%** of visitors who recall advertising

**Insights:**

- » 1 in 4 Summer visitors recalled seeing promotions for Walton County before their trip- an increase of 2% points compared to Summer 2024.
- » The percentage of visitors who saw advertising and reported being influenced by that information increased 7% points year-over-year (+3% points increase in overall visitors).

**Recommendations:**

- » Direct creative toward families and large travel parties seeking stress-free, all-in-one destinations.



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

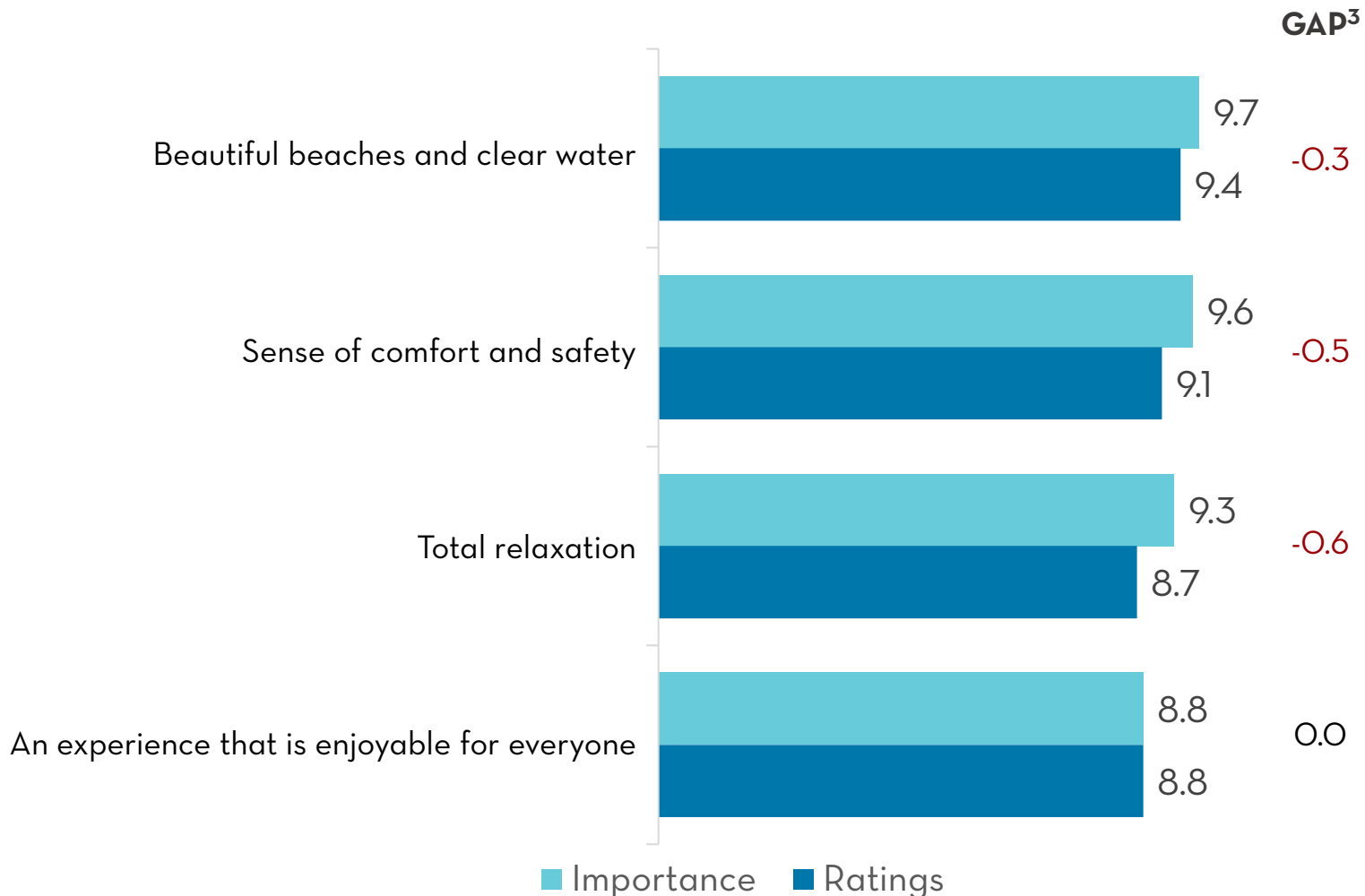
# VACATION ATTRIBUTE IMPORTANCE<sup>1</sup> VS. RATINGS<sup>2</sup>

## Insight:

- » While still highly rated, the top 3 factors most important to Summer visitors all received a negative GAP score, meaning there still may be room to improve from the visitor perspective.

## Recommendations:

- » Emphasize vast beautiful beaches and tranquility in messaging.
- » Find and share genuine testimonials that discuss Walton County's attempts to alleviate beach and safety concerns.



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

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

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

For example, a "Beautiful beaches and clear water" is extremely important to visitors with a score of 9.7. Visitors rated WC as 9.4 on its beaches. Hence, the GAP is -0.3.

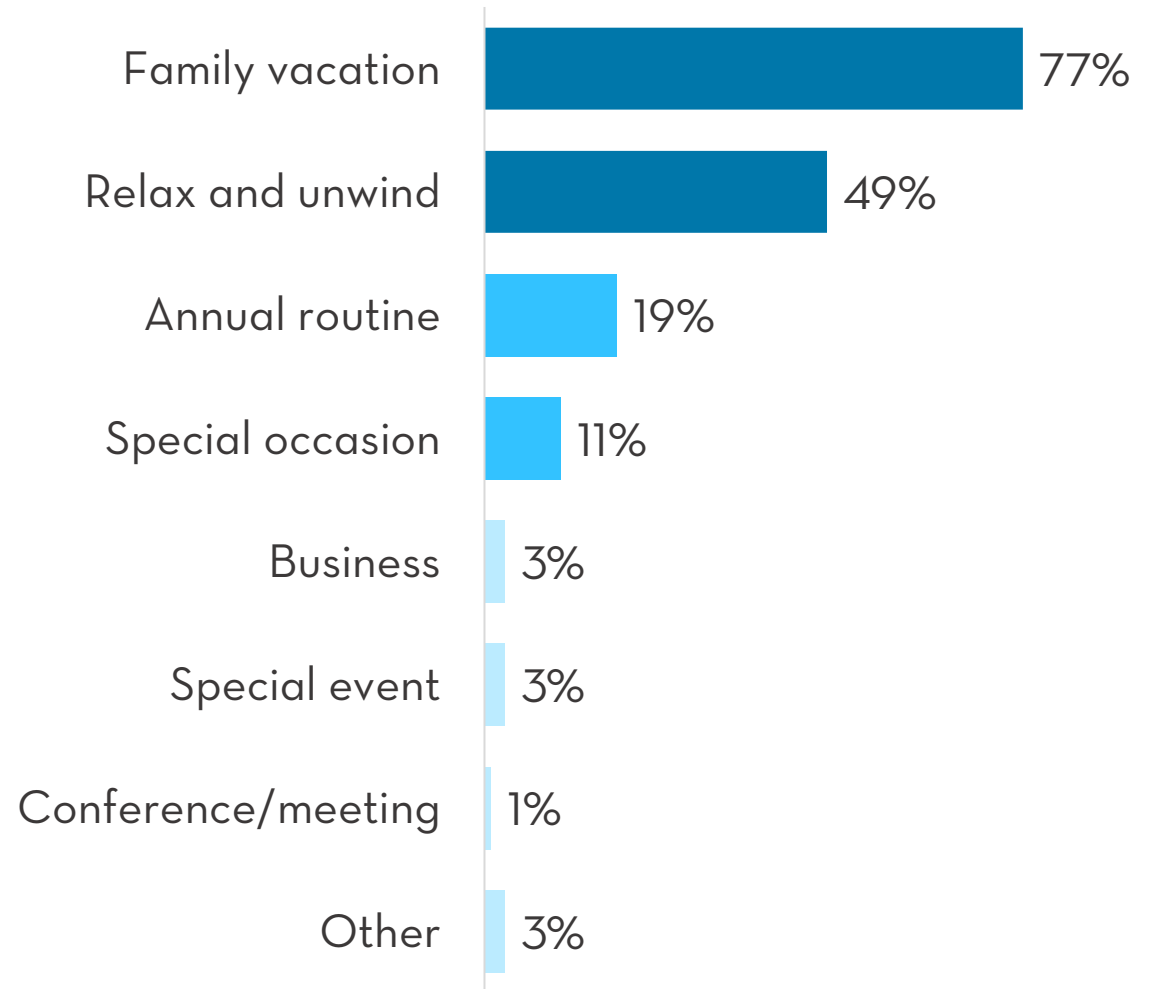
# REASONS FOR VISITING

## Insights:

- » Summer consistently has a higher share of visitors reporting that a family vacation is their reason for visiting Walton County compared to other seasons.<sup>1</sup>

## Recommendations:

- » Tailor promotional content to highlight family time, kid-friendly activities, and shared beach experiences.
- » Reinforce Walton County's reputation as a safe, comfortable, and fun destination for all ages.



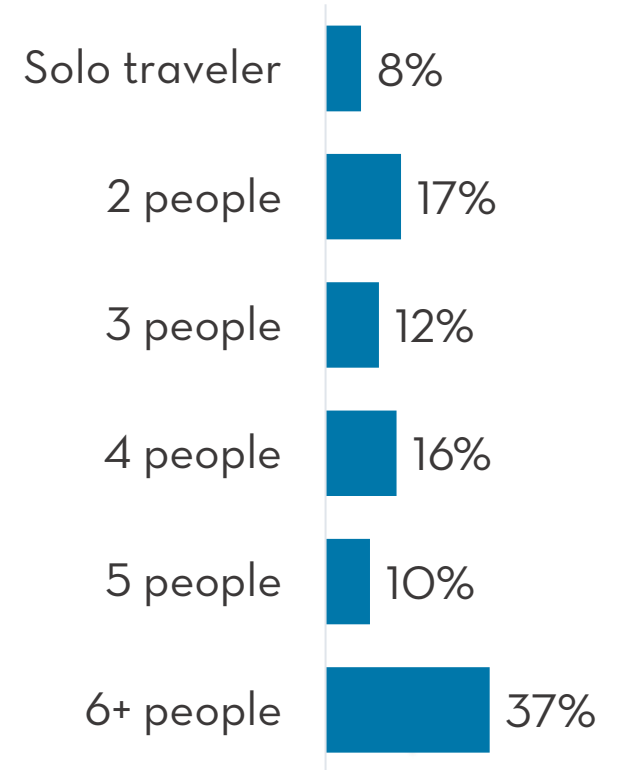
# TRAVEL PARTIES

## Insights:

- » Nearly 2 in 3 visitors to Walton County this Summer traveled with children under the age of 20. Summer consistently has the highest percentage of visitors traveling with children.<sup>1</sup>
- » Likewise, the typical travel party size is consistently higher in Summer than in other seasons.<sup>1</sup> Nearly 2 in 3 visitors this summer were part of a travel party of 4 or more people.

## Recommendations:

- » Emphasize family bonding in all Summer marketing creative.
- » Showcase large homes, vacation rentals, and multi-family lodging to support the needs of bigger groups.



# ORIGIN OF SUMMER VISITORS

## Insight:

- » Over 1 in 5 Summer visitors are from Atlanta, Nashville, or Dallas-Fort Worth.
- » Over half of visitors are from Texas, Tennessee, Georgia, or Alabama.

## Recommendation:

- » Maintain efforts boosting awareness in Atlanta, Nashville, and Dallas-Fort Worth, especially with drive-market messaging and early booking incentives.

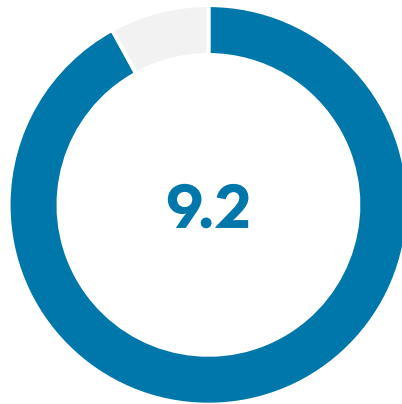
**34%** of visitors are from 6 markets

- 9%** Atlanta
- 7%** Nashville
- 6%** Dallas-Fort Worth
- 4%** Birmingham
- 4%** Memphis
- 4%** Houston

**63%** of visitors are from 6 states

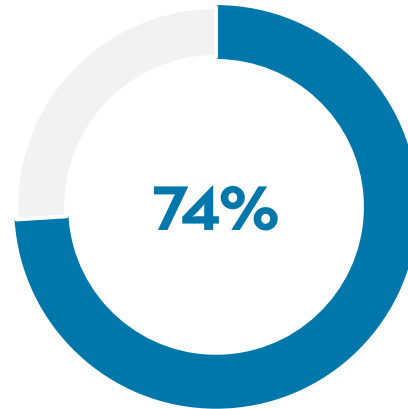
- 15%** Texas
- 13%** Tennessee
- 12%** Georgia
- 11%** Alabama
- 6%** Mississippi
- 6%** Louisiana

# SATISFACTION STATISTICS



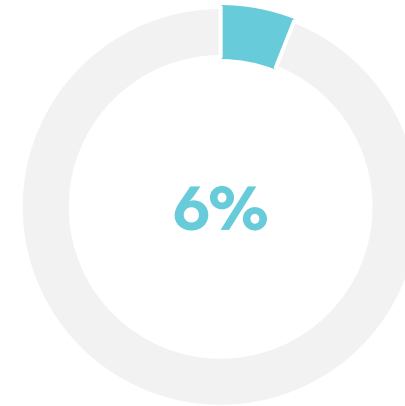
## Highly Rated

Visitors gave Walton County a rating of 9.2 out of 10 (consistent with 2024) as a place to vacation



## DEFINITELY RETURN

74% of visitors said they would definitely return to Walton County



## UNCERTAIN ABOUT RETURNING<sup>1</sup>

6% of visitors were uncertain of whether they would return or not

<sup>1</sup>6% 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

*"Perfect for multigenerational families to get together in a beautiful, safe area with the prettiest beaches in the world."*



*"Best place on Earth!"*

*"I have been to Waikiki, Maui, SoCal, the Caribbean, Mediterranean, and more beaches, and WaterColor is the best of all the beaches. We are Canadian, and we all love the US."*



# YEARLY COMPARISONS



# VISITOR PROFILE - SUMMER 2024 VS. 2025

Visitor Metrics	Summer 2024	Summer 2025
<b>Travel party</b>	5.3	5.1
<b>Kids &lt;20</b>	61%	65%
<b>Median age</b>	53	53
<b>Estimated median household income</b>	\$144,400	\$145,000
<b>Drove</b>	75%	74%
<b>Nights stayed<sup>1</sup></b>	5.9	6.3
<b>Direct expenditures (travel party for entire trip)</b>	\$4,370	\$4,420
<b>1<sup>st</sup> time visitor</b>	13%	15%
<b>Over 10 visits to Walton County</b>	34%	31%

<sup>1</sup>Visitors staying 30 days or fewer.

# VISITOR PROFILE - SUMMER 2024 VS. 2025

Top Origin States	Summer 2024	Summer 2025
<b>Texas</b>	16%	15%
<b>Tennessee</b>	13%	13%
<b>Georgia</b>	14%	12%
<b>Alabama</b>	9%	11%
<b>Mississippi</b>	7%	6%
<b>Louisiana</b>	7%	6%

Origins - Regions	Summer 2024	Summer 2025
<b>Southeast</b>	73%	70%
<b>Midwest</b>	16%	18%
<b>West</b>	5%	5%
<b>Florida</b>	3%	4%
<b>Northeast</b>	2%	2%
<b>International</b>	1%	1%

# VISITOR PROFILE – SUMMER 2024 VS. 2025

Top Visitor Activities	Summer 2024	Summer 2025
<b>Beach</b>	91%	90%
<b>Restaurants</b>	87%	88%
<b>Relax and unwind</b>	78%	79%
<b>Shopping</b>	71%	73%
<b>Family time, reading, cooking</b>	67%	66%
<b>Biking, running</b>	49%	51%
<b>Water sports</b>	38%	44%
<b>Golf or tennis</b>	27%	25%
<b>Bars, nightclubs</b>	21%	23%
<b>Attractions</b>	17%	23%
<b>Special events</b>	19%	21%
<b>Hiking, nature walks, eco tours</b>	16%	19%
<b>State parks</b>	13%	13%
<b>Art galleries, museums, cultural events</b>	7%	7%
<b>Spas</b>	8%	7%
<b>Dune lakes</b>	7%	7%
<b>Business meetings, conferences</b>	1%	2%
<b>Other</b>	2%	1%

# VISITOR PROFILE – SUMMER 2024 VS. 2025

Visitor Metrics	Summer 2024	Summer 2025
<b>Will return to Walton County<sup>1</sup></b>	95%	94%
<b>Rating for overall experience<sup>2</sup></b>	9.2	9.2
<b>Viewed Visitors Guide<sup>3</sup></b>	23%	28%
<b>Planned trip 6+ months out</b>	25%	21%
<b>Used VisitSouthWalton.com</b>	12%	13%
<b>Used 1 of 16 beaches' websites</b>	15%	14%
<b>Use the term "South Walton"</b>	10%	12%

<sup>1</sup> Includes “Definitely will return” and “Probably will return”.

<sup>2</sup> 10-point scale with 10=Excellent & 1=Poor.

<sup>3</sup> 22% used the online version & 6% 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 – SUMMER 2025 VS. 2024

- » With over 1.9 million visitors this Summer, total visitor spending was over \$1.5 billion.
- » An increase in occupancy and a slight decrease in ADR led to a tempered increase in RevPAR and TDT.
- » The total number of visitors decreased due to an increase in length of stay and a decrease in travel party size.
- » Occupancy increased slightly while room nights decreased due to a decrease in the number of units available.
- » Direct spending and economic impact of tourism were down year-over-year due to a decrease in the numbers of visitors, as well as decreases in shopping, entertainment, and restaurant spending.
- » While overall spending was down, there was a 1.7% increase in travel party spending for those staying in paid accommodations.

Visitor Metrics	Summer 2024	Summer 2025	% Δ
<b>Room nights</b>	1,283,400	1,241,100	-3.3%
<b>Total visitors</b>	2,056,800	1,928,600	-6.2%
<b>TDT collections</b>	\$29,185,008	\$29,588,853	+1.4%
<b>Direct spending</b>	\$1,663,697,800	\$1,558,484,300	-6.3%
<b>Economic impact<sup>1</sup></b>	\$2,428,998,800	\$2,228,632,500	-8.2%
<b>Occupancy</b>	68.1%	69.1%	+1.5%
<b>Room rates</b>	\$504.21	\$500.54	-0.7%
<b>RevPAR</b>	\$343.37	\$345.87	+0.7%

**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.

<sup>1</sup>The economic impact multiplier for Walton County in 2025 is 1.43. In 2024 it was 1.46. This estimated economic impact is preliminary and does NOT account for leakage outside of Walton County (i.e., the cost of wholesale and retail trade services that do not continue to circulate within the county’s economy). Adjustments will be made to this estimate in the annual report to account for leakage.

# LODGING METRICS<sup>1</sup>

**69.1%**

Occupancy

↑ 1.5%

**\$500.54**

ADR

↓ 0.7%

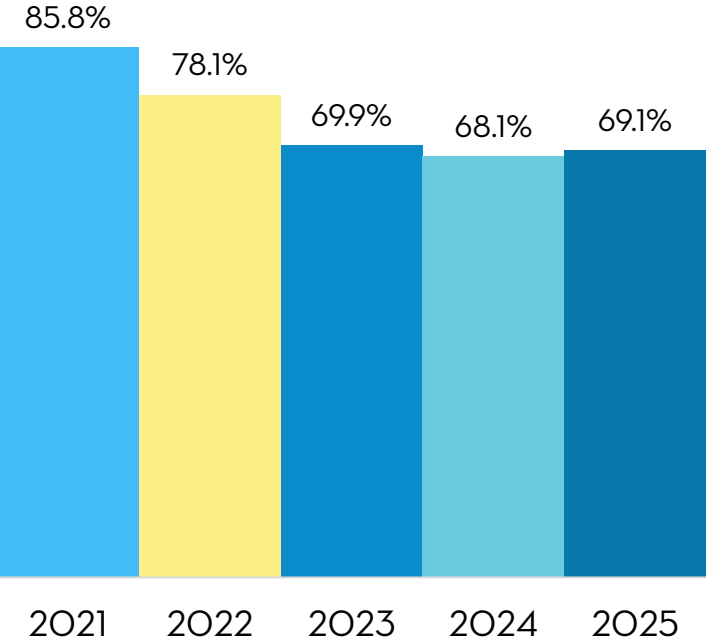
**\$345.87**

RevPAR

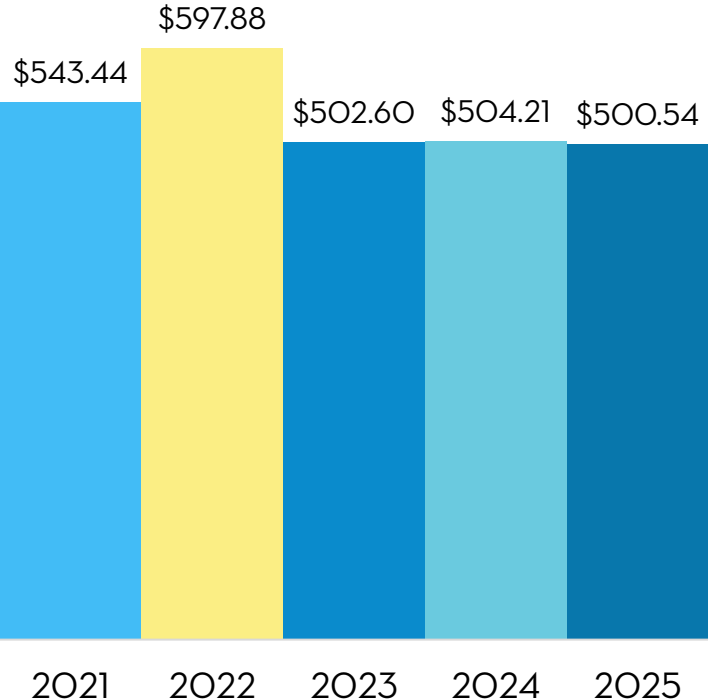
↑ 0.7%

# 5-YEAR OVERVIEW – SUMMER LODGING METRICS

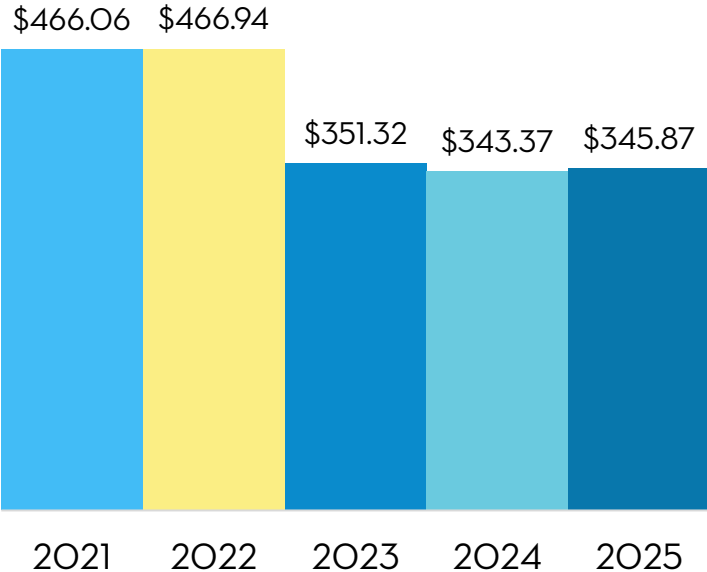
### Occupancy Rate



### Average Daily Rate

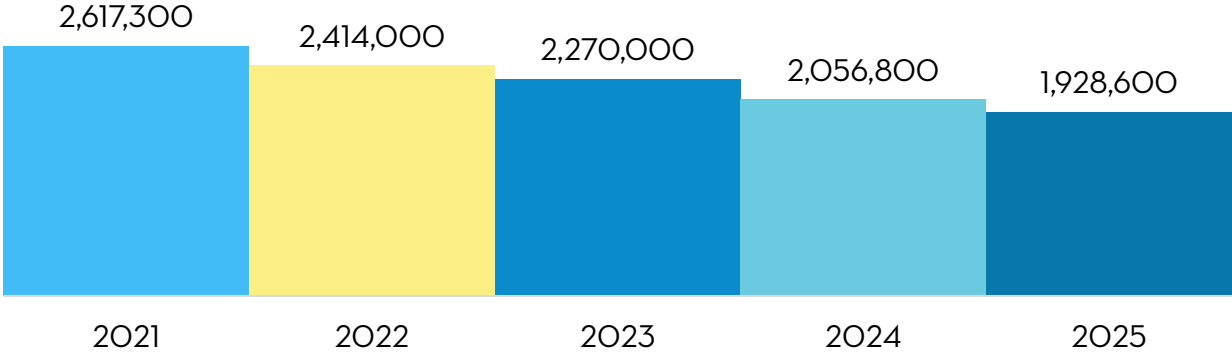


### Revenue per Available Room

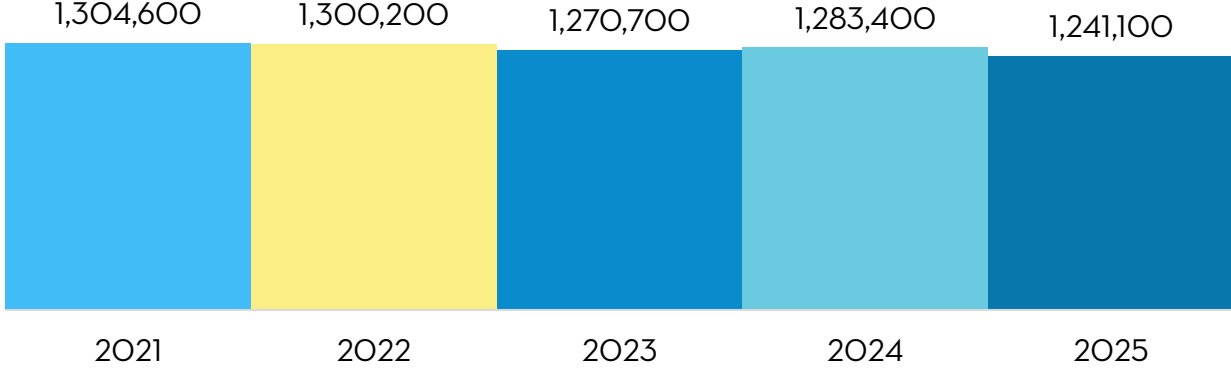


# 5-YEAR OVERVIEW – SUMMER TOURISM METRICS

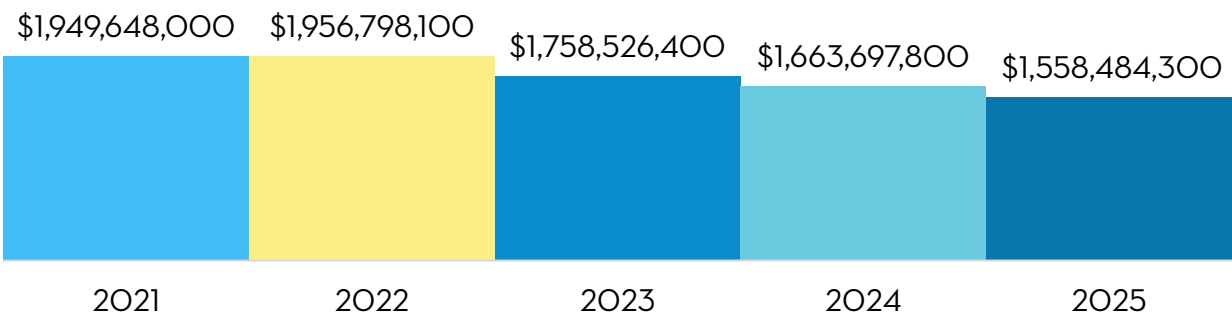
**Visitors**



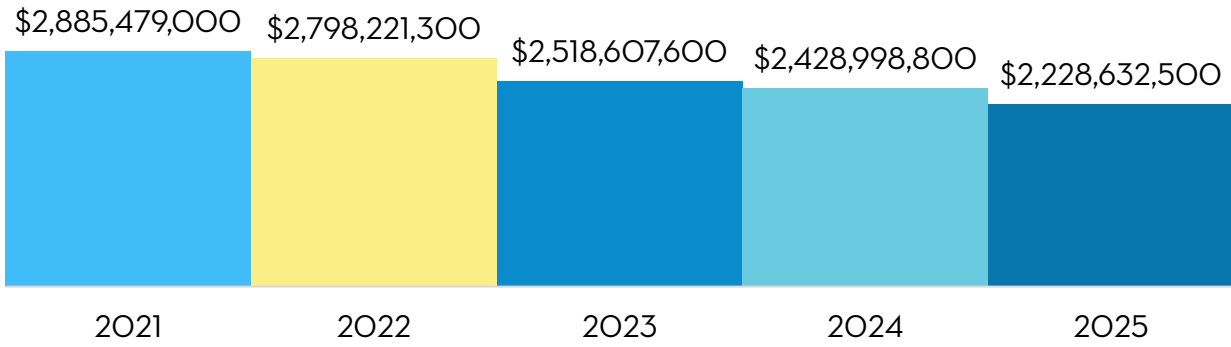
**Room Nights**



**Direct Spending**



**Economic Impact**



# VISITOR JOURNEY: PRE-VISIT



# PLANNING CYCLE



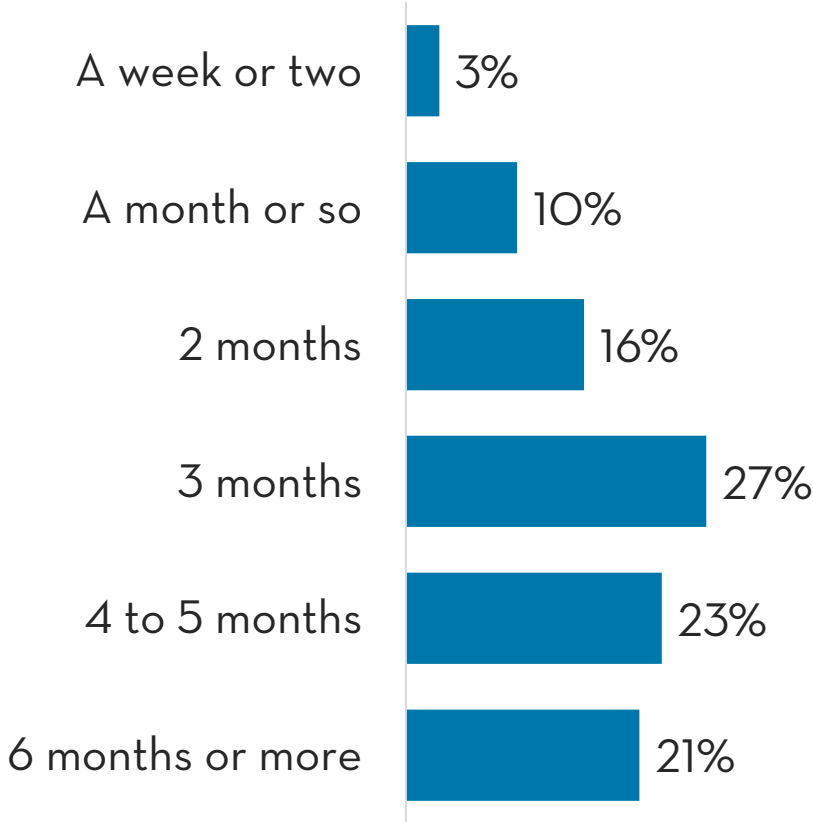
**Over 7 in 10** visitors plan a Walton County Summer vacation at least **3 months** in advance



**Over 1 in 8** visitors to Walton County have **a short (a month or less) planning cycle**



Typical trip planning cycle begins **103 days** before the trip (104 days in 2024)



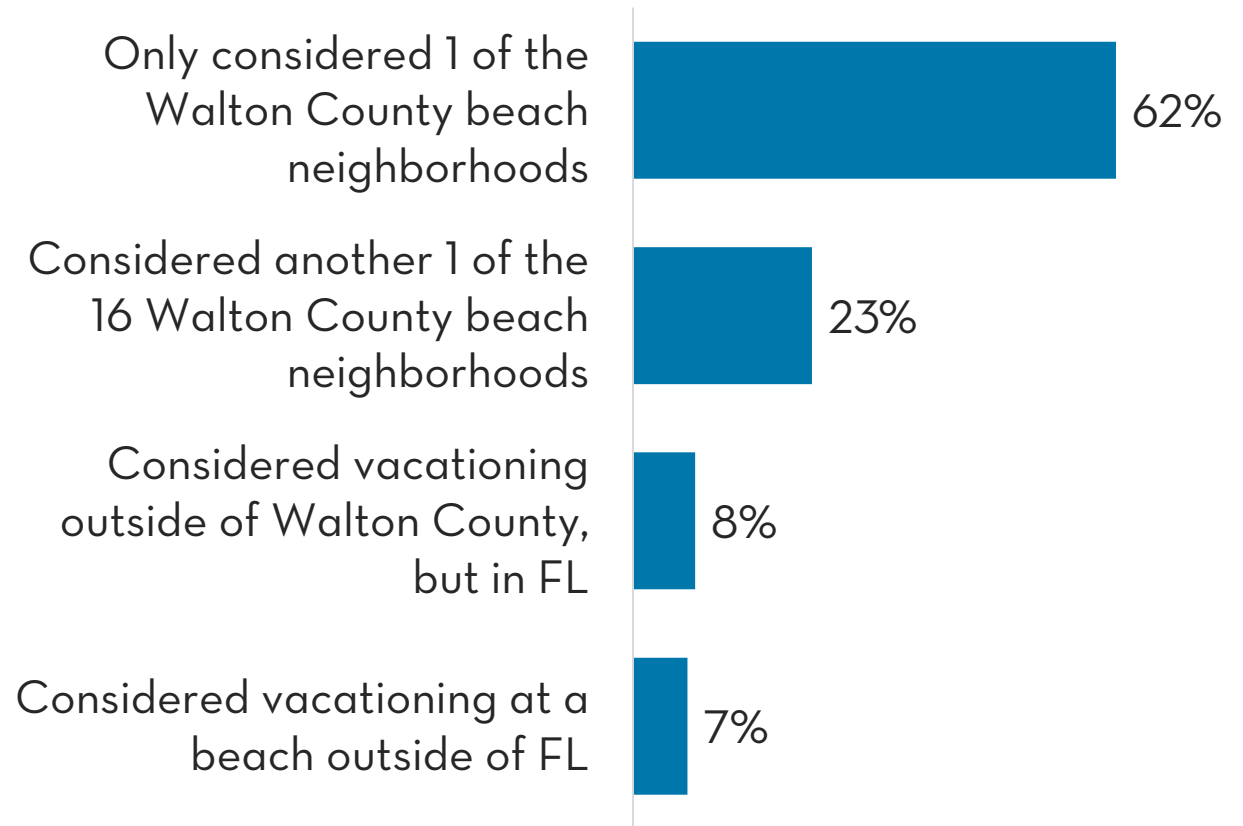
# OTHER DESTINATIONS CONSIDERED



**Over 3 in 5** (-1% points from 2024) Summer visitors only consider going to the Walton County beach neighborhood where they stay



**Nearly 1 in 8** use the term “South Walton” when referring to the area

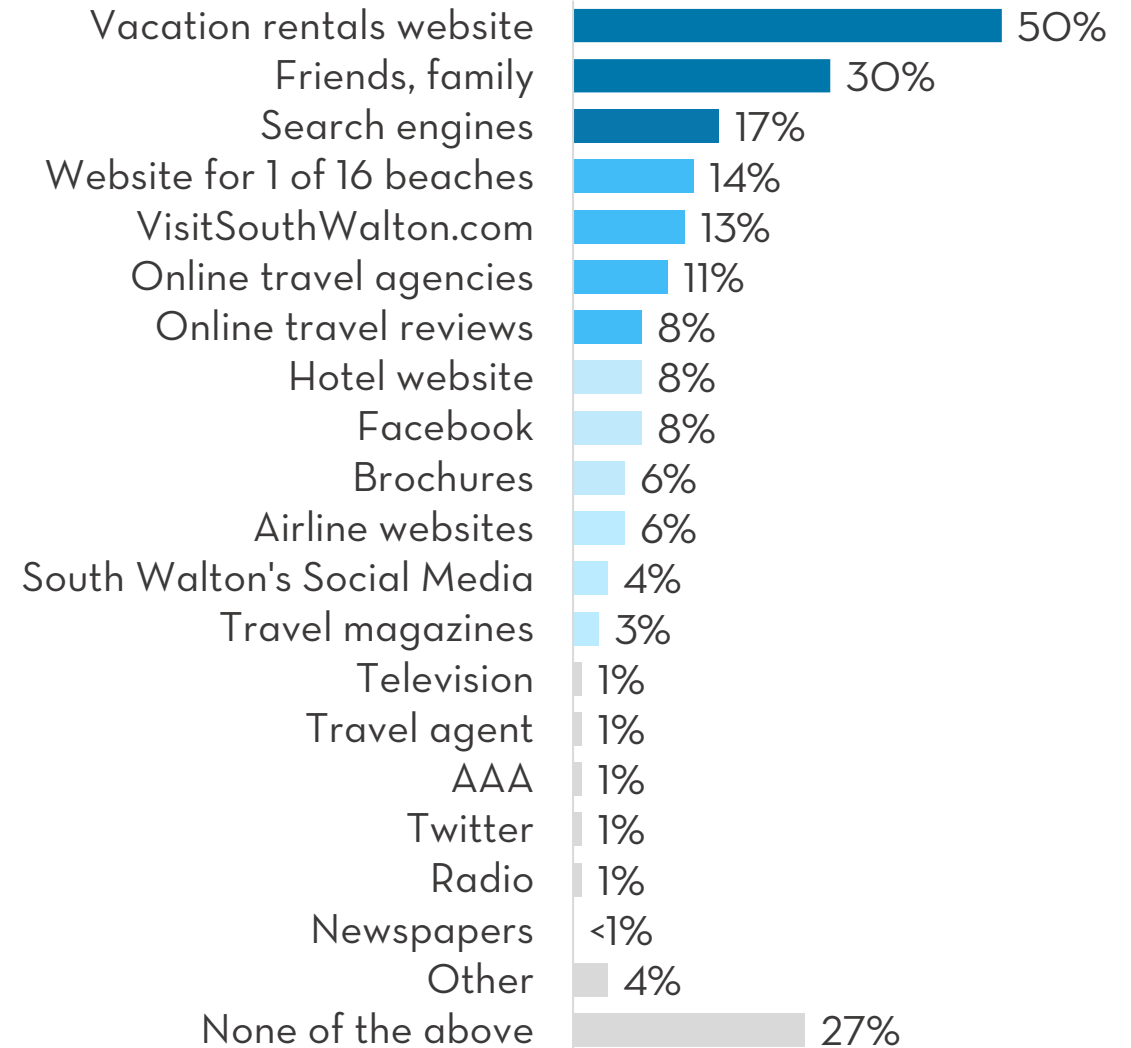


# TRIP PLANNING SOURCES<sup>1</sup>

**Half** of visitors use a vacation rental website to help plan their trip to Walton County

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

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

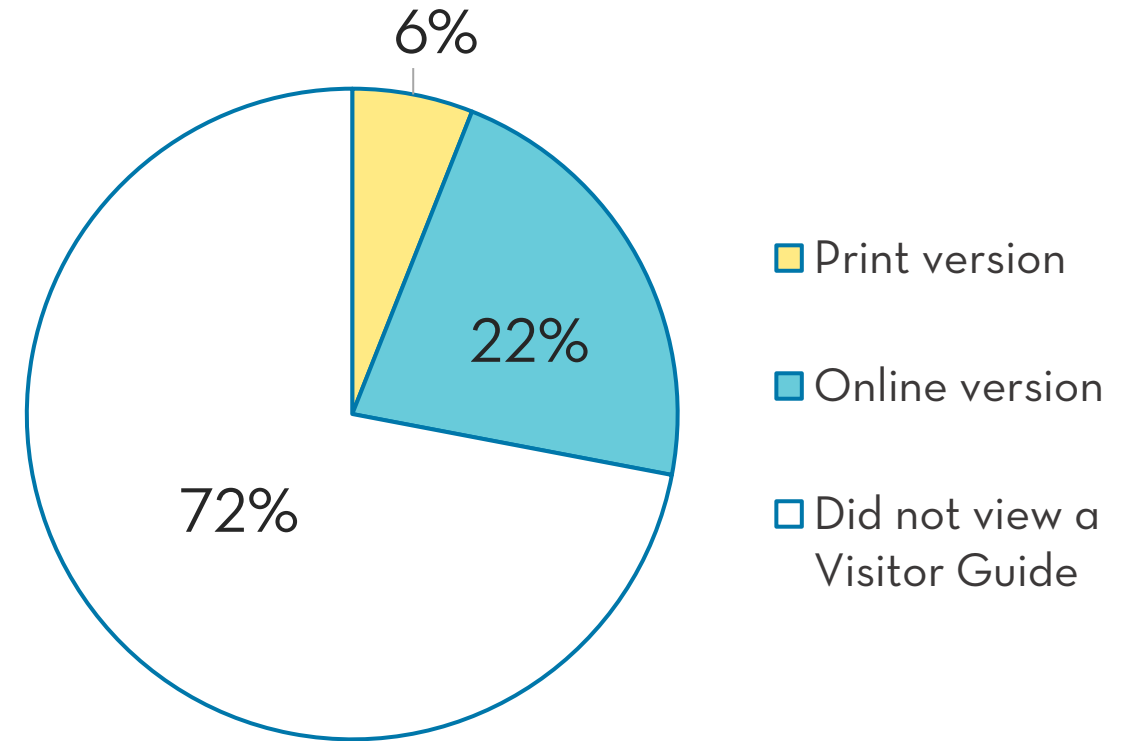


<sup>1</sup> Multiple responses permitted.

# WALTON COUNTY VISITOR GUIDE

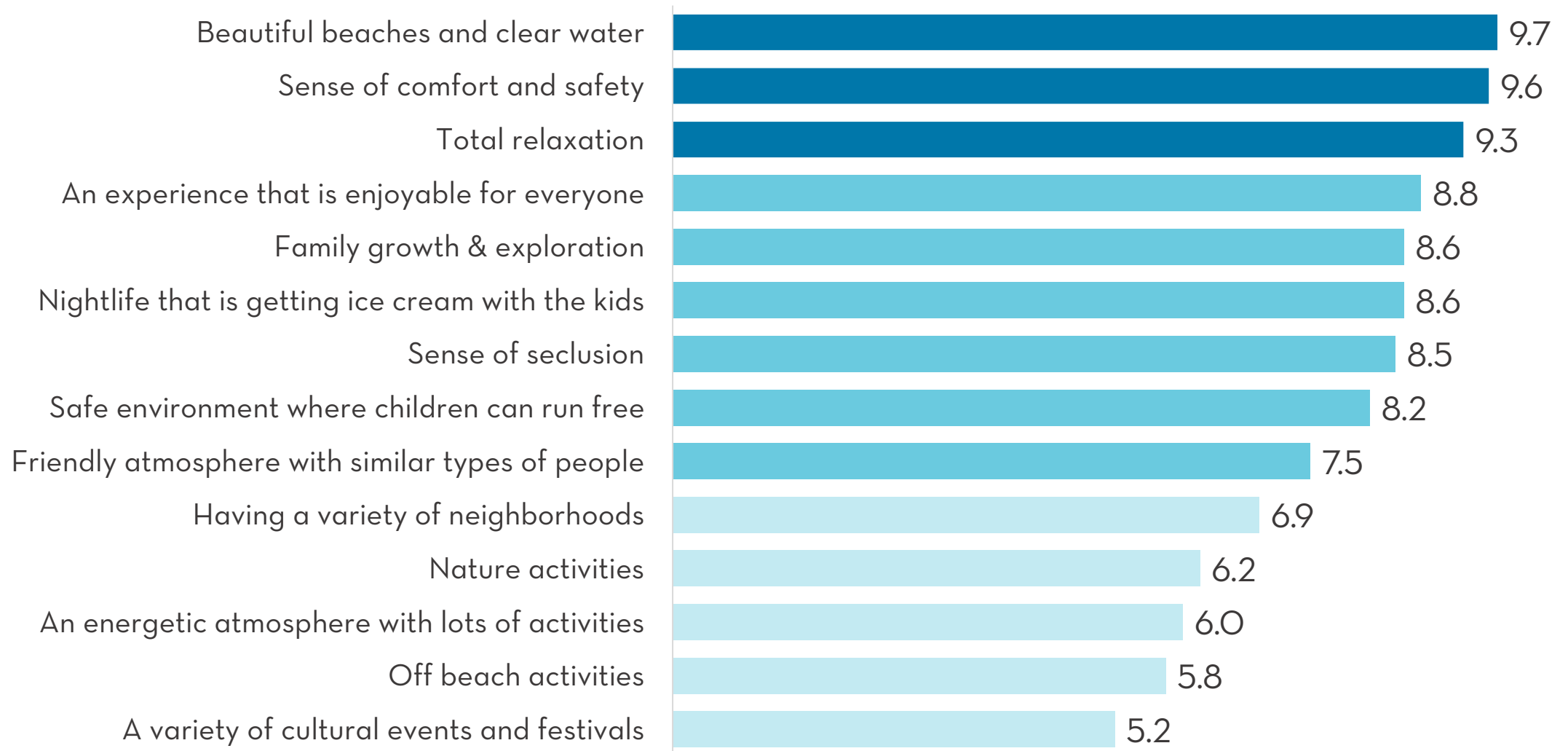
**Over 1 in 4** visitors view a Walton County Visitor Guide before going to the area (+3% points from 2024, +4% points from 2024 for the online version)

Summer visitors give the Visitor Guide a rating of **8.8 out of 10<sup>1</sup>** (+0.2 points from 2024)



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

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



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

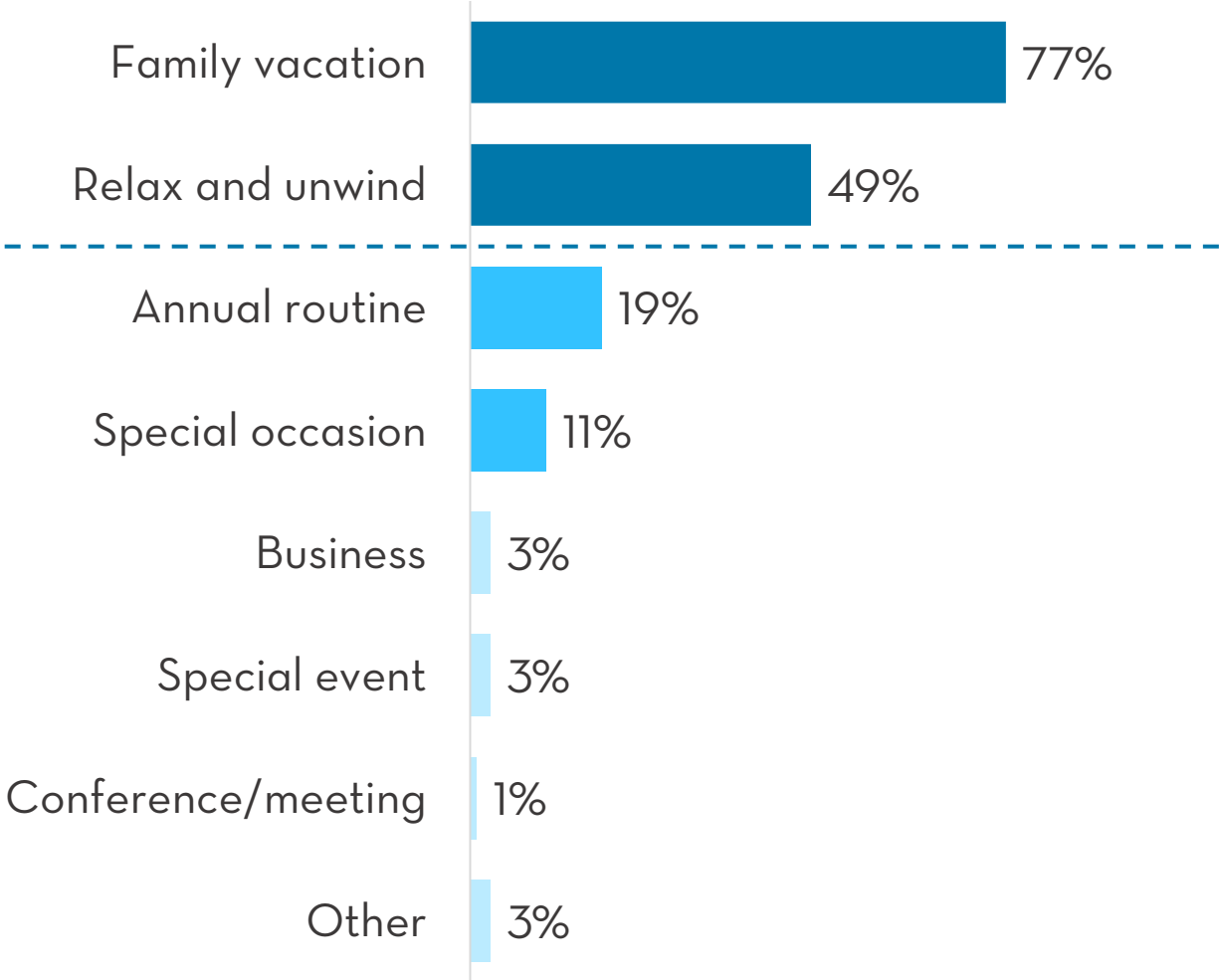
# REASONS FOR VISITING<sup>1</sup>



**Over 3 in 4** Summer visitors come for a **family vacation**



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



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

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



**25%** (+2% points from 2024) of Summer visitors recall advertising, promotions, or travel stories for Walton County

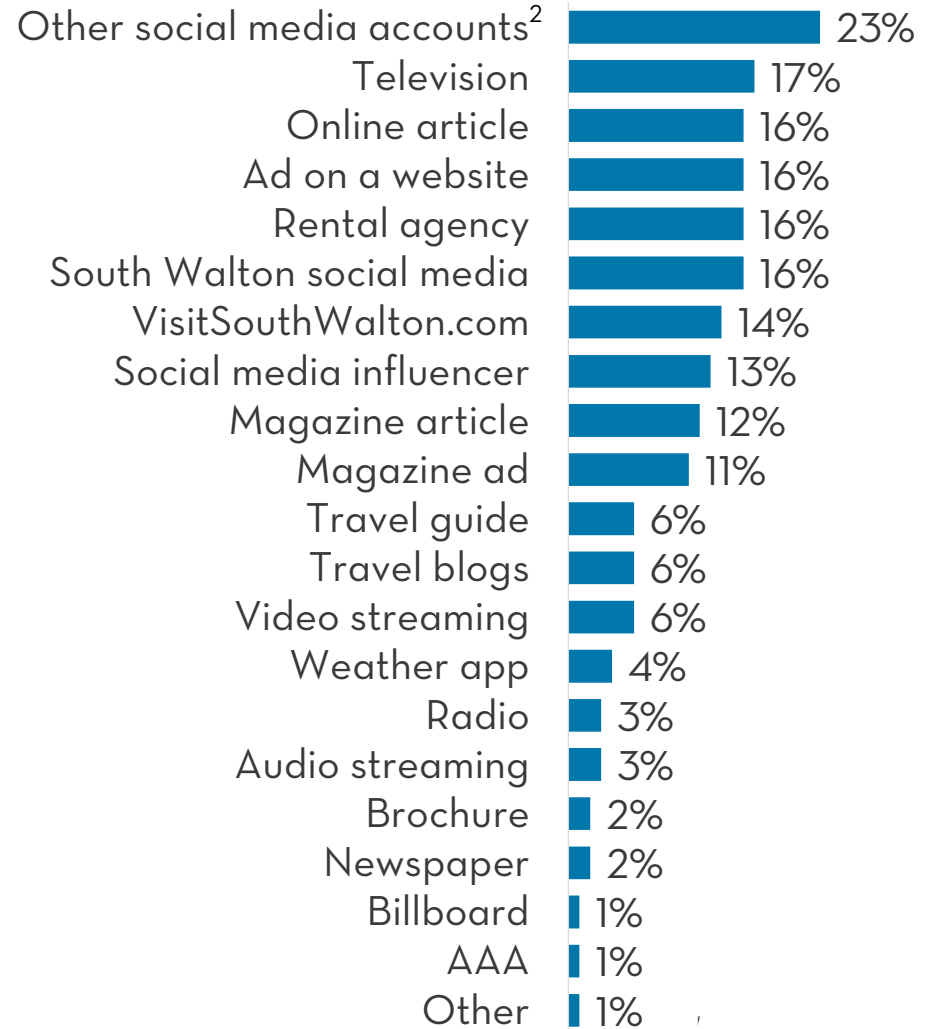


This information influences **10%** (+3% points from 2024) of all visitors to visit Walton County



**23%** (consistent with 2024) Summer visitors recall information about the destination on **Other Social Media Accounts**

Base: **25%** of visitors who recall advertising



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

<sup>2</sup>These refer to social media accounts not associated with Walton County Tourism.

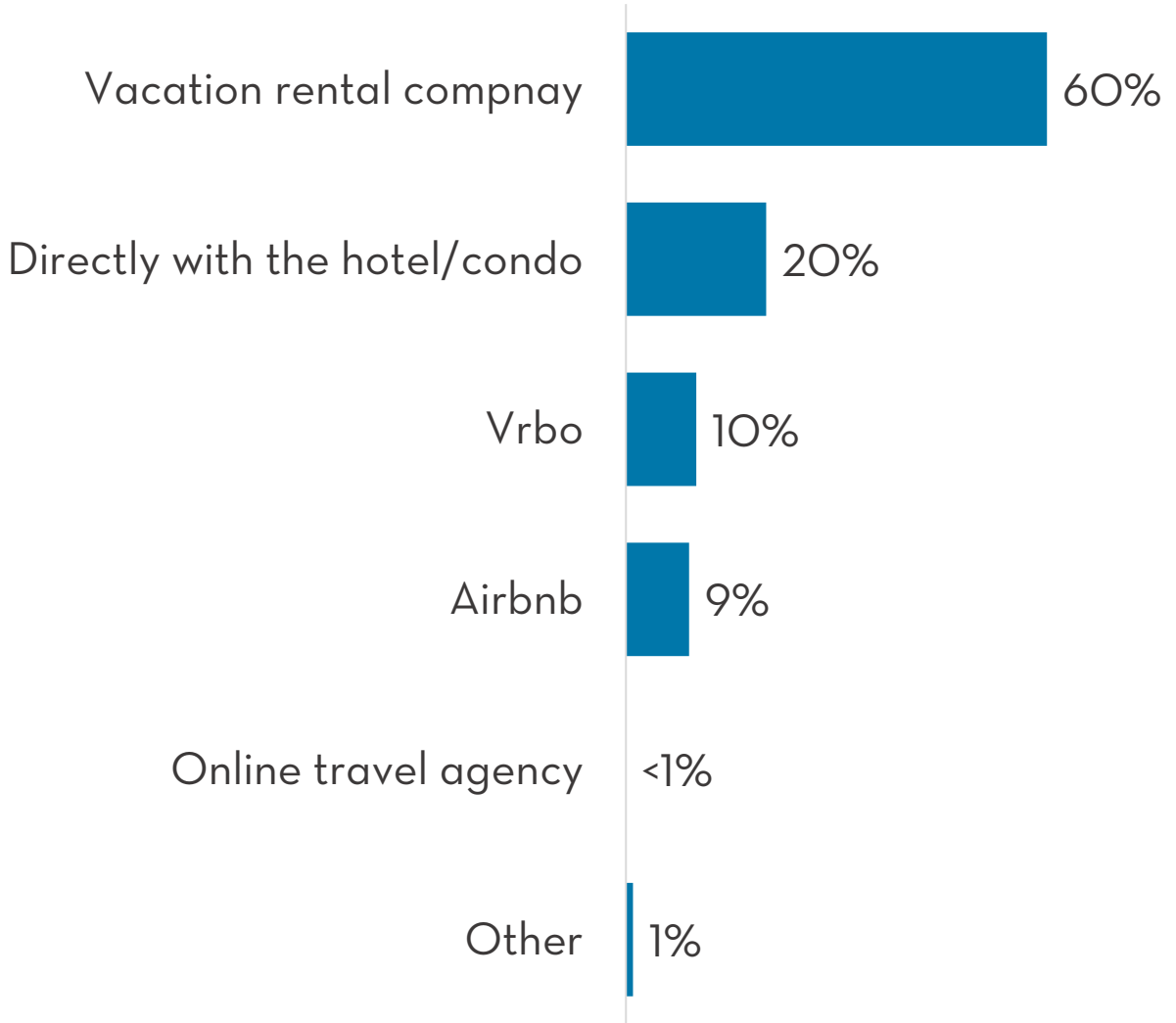
# BOOKING ACCOMMODATIONS



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



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



# VISITOR TRANSPORTATION

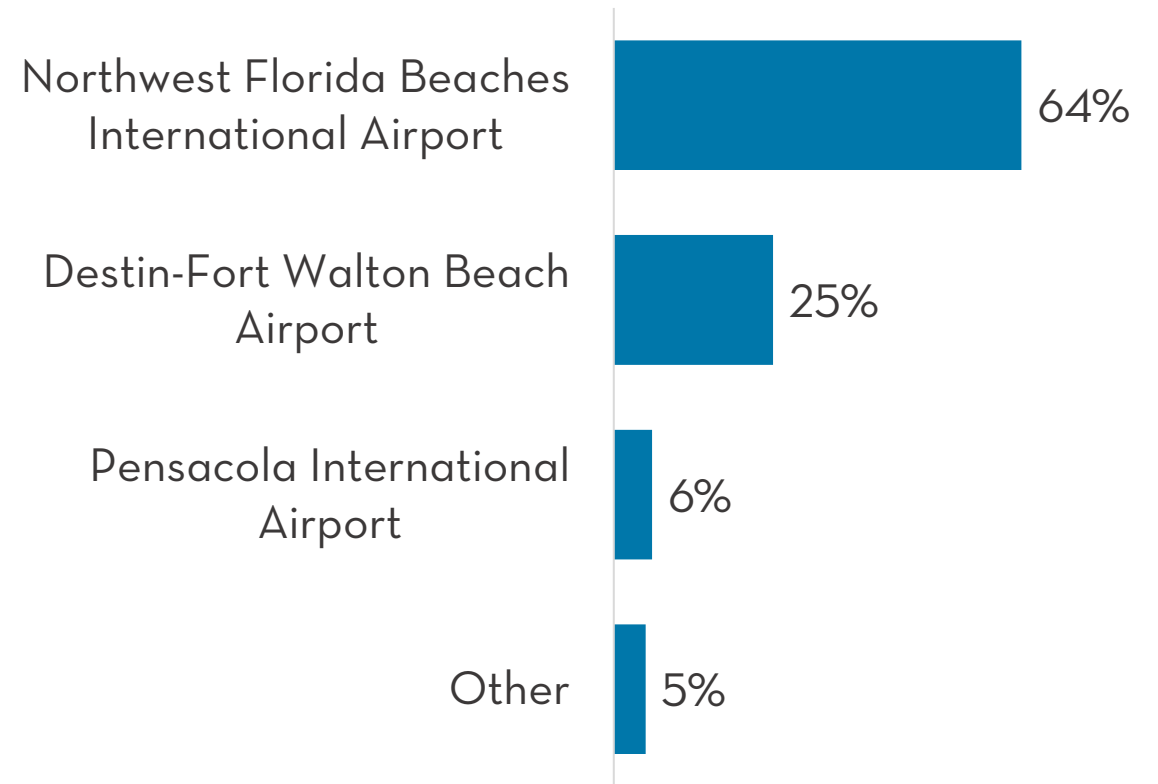


**74%** (-1% points from 2024) of Summer visitors drive to Walton County



**24%** (-4% points from 2024) of those who drive are aware that there are direct flights from their city to the Walton County area, and **25%** are not sure if there are direct flights available

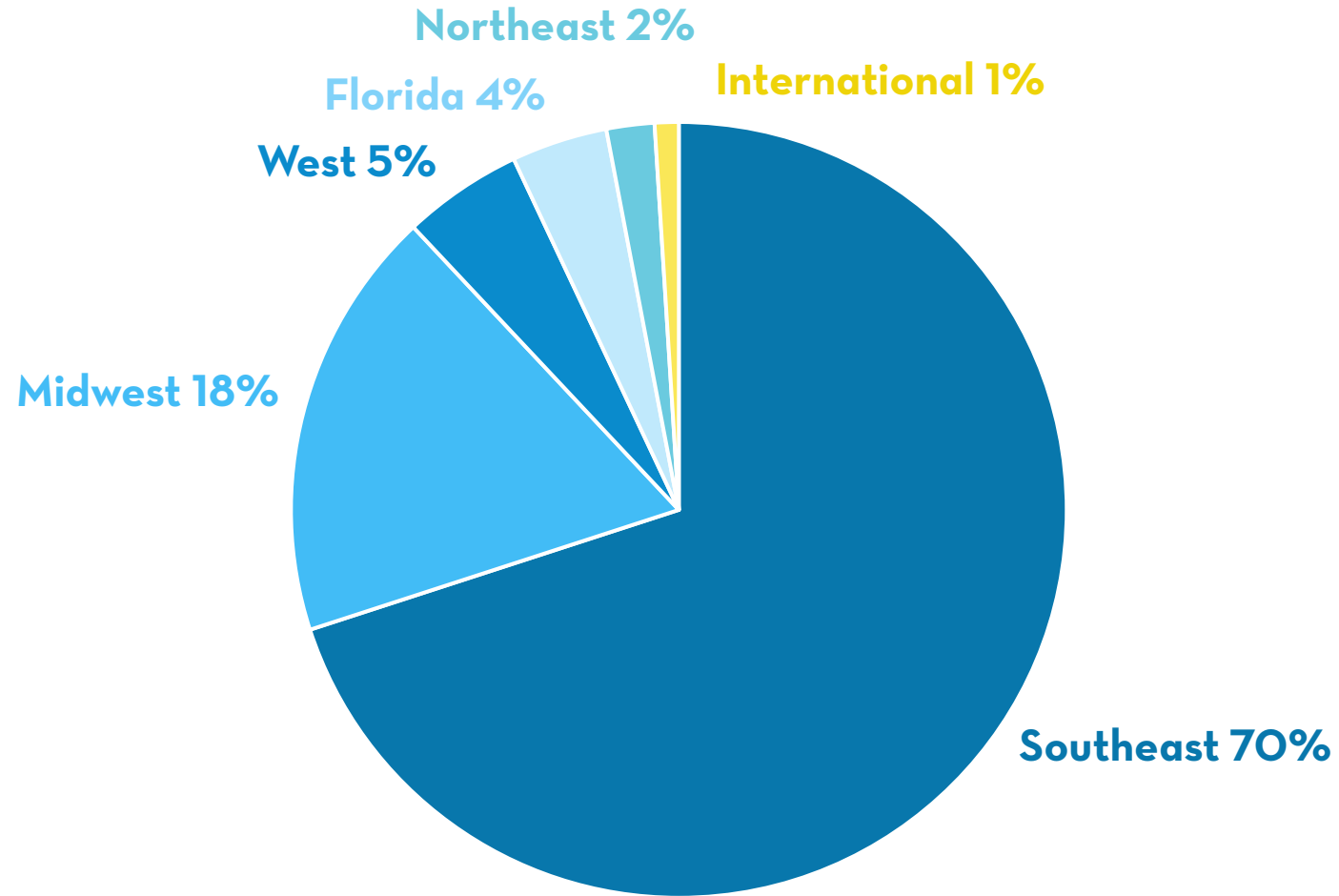
**26%** who **fly** use the following airports:



# VISITOR JOURNEY: TRAVEL PARTY PROFILE

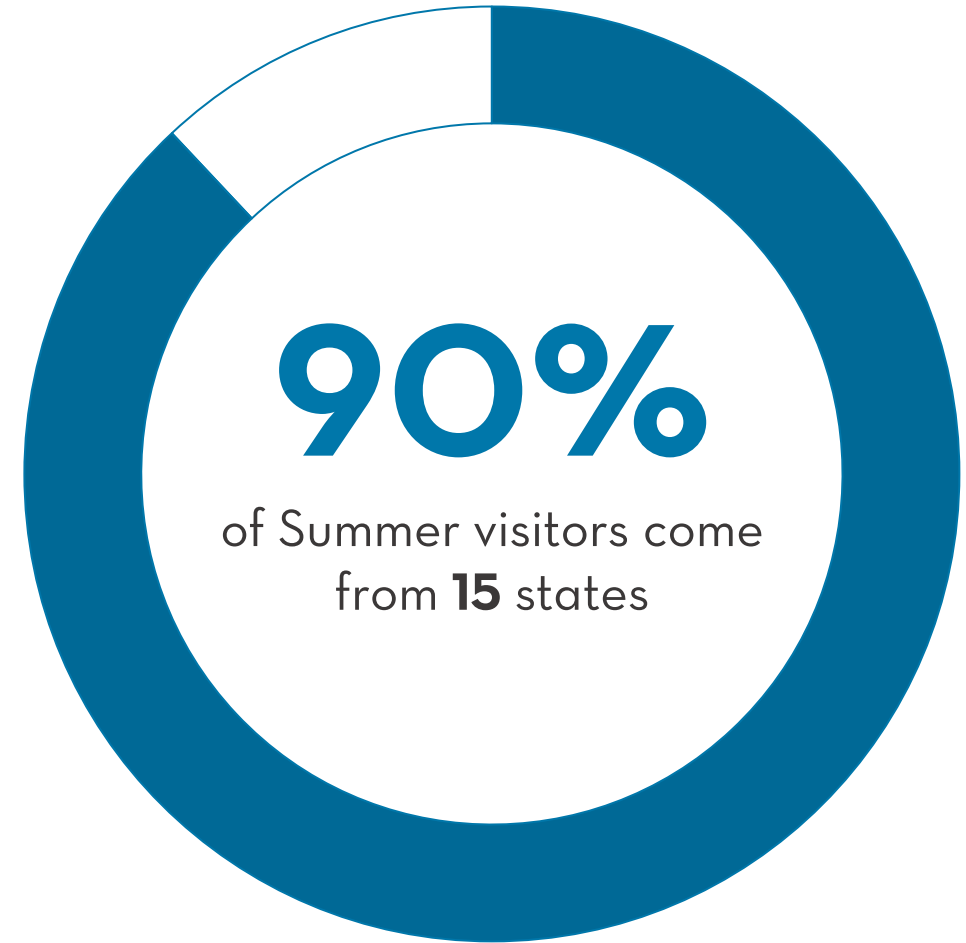


# ORIGIN OF SUMMER VISITORS



# ORIGIN OF SUMMER VISITORS

State	% of Visitors
Texas	15%
Tennessee	13%
Georgia	12%
Alabama	11%
Mississippi	6%
Louisiana	6%
Illinois	4%
Missouri	4%
Florida	4%
Arkansas	3%
Kentucky	3%
Ohio	3%
Indiana	2%
North Carolina	2%
Oklahoma	2%



# ORIGIN OF SUMMER VISITORS

**9%** (-3% points from 2024) of all visitors come from the **Atlanta** market

**7%** (-1% points from 2024) of visitors are from the **Nashville** market

Top Origin Markets	% of Visitors
Atlanta	9%
Nashville	7%
Dallas-Fort Worth	6%
Birmingham	4%
Memphis	4%
Houston	4%
New Orleans	3%
Mobile-Pensacola	3%
Saint Louis	3%
Chicago	2%
Columbus, OH	2%
Austin	2%
Little Rock-Pine Bluff	2%
Indianapolis	2%
Louisville	2%
Columbus-Tupelo-West Point	2%
Huntsville-Decatur-Florence	2%

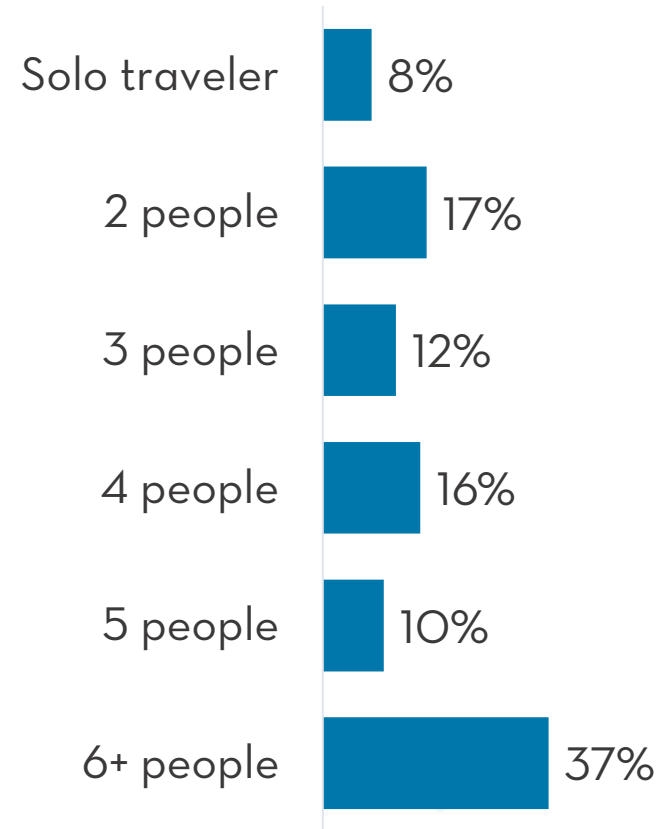
# TRAVEL PARTY SIZE AND COMPOSITION



Visitors travel in a party composed of **5.1** people (5.3 in 2024)



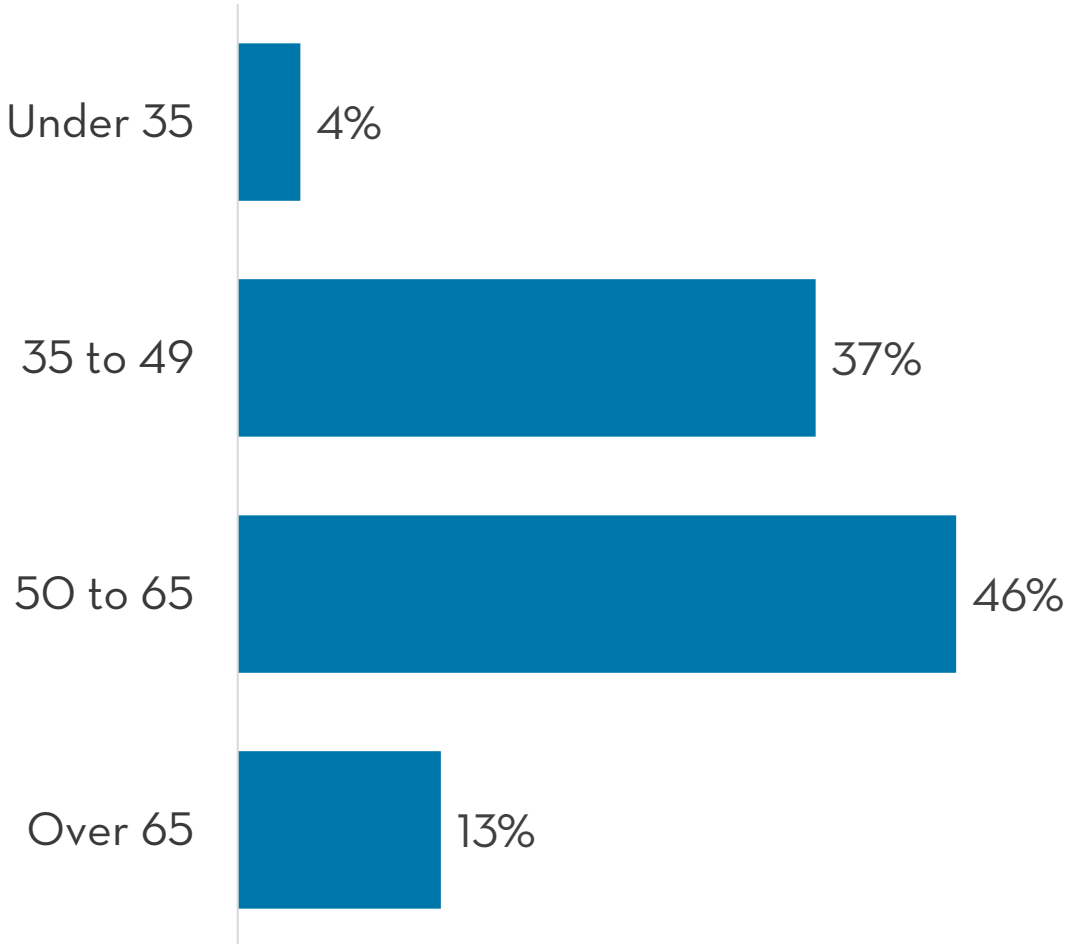
**65%** (+4% points from 2024) of visitors travel with children under the age of 20



# AGE OF SUMMER VISITORS<sup>1</sup>



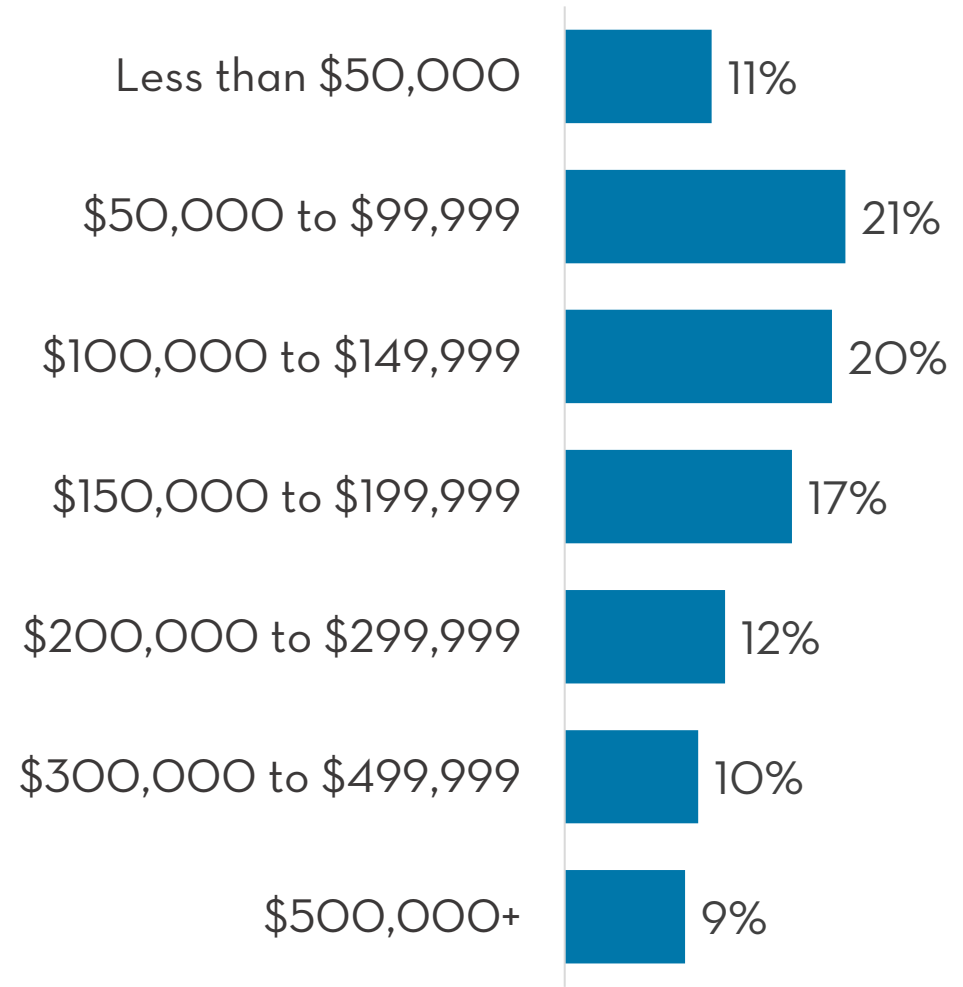
Median age of Summer visitors is **53 years old** (consistent with 2024)



<sup>1</sup>Age 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

Summer visitors have a **median** household income of **\$145,000** (\$144,400 in 2024), while estimated **average** household income is **\$191,000** (\$200,300 in 2024)



# VISITOR JOURNEY: TRIP EXPERIENCE



# VISITOR ACCOMMODATIONS



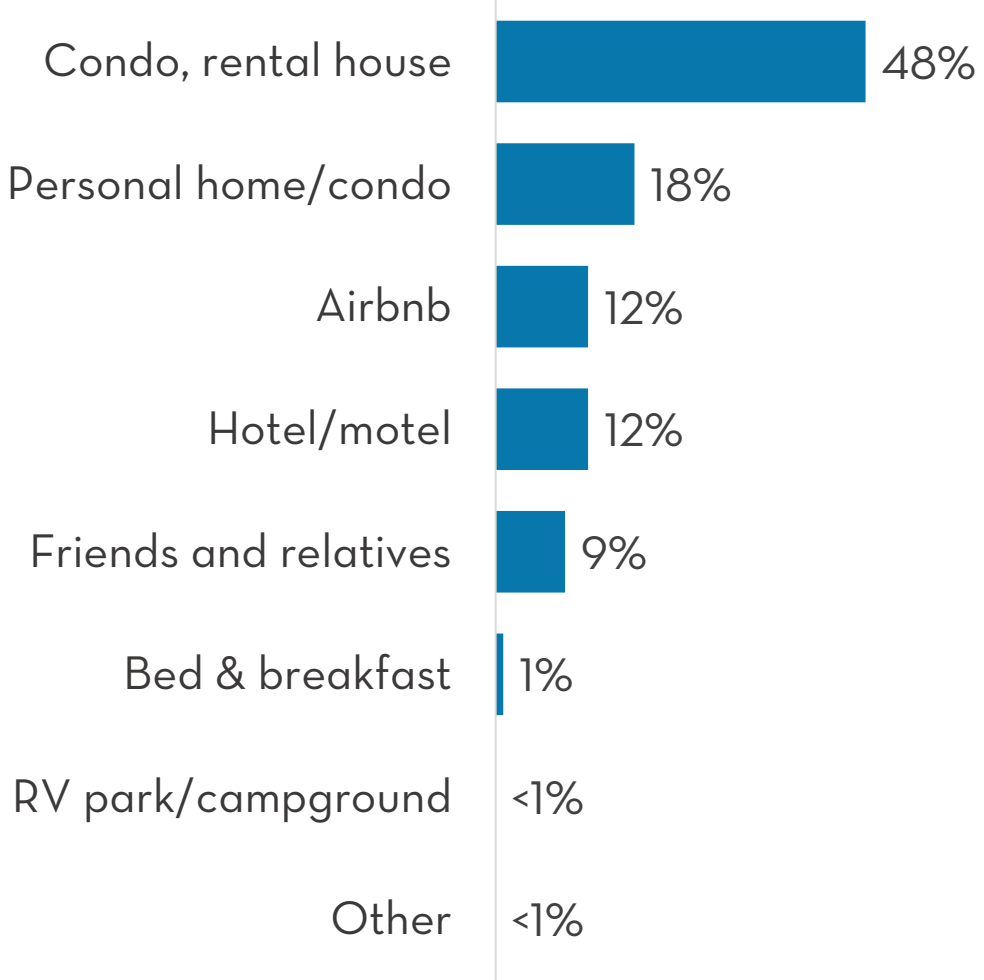
**Nearly half** of Summer visitors stay in a condo or rental house



**18%** visitors stay in their personal home or condo



**12%** stay in an Airbnb



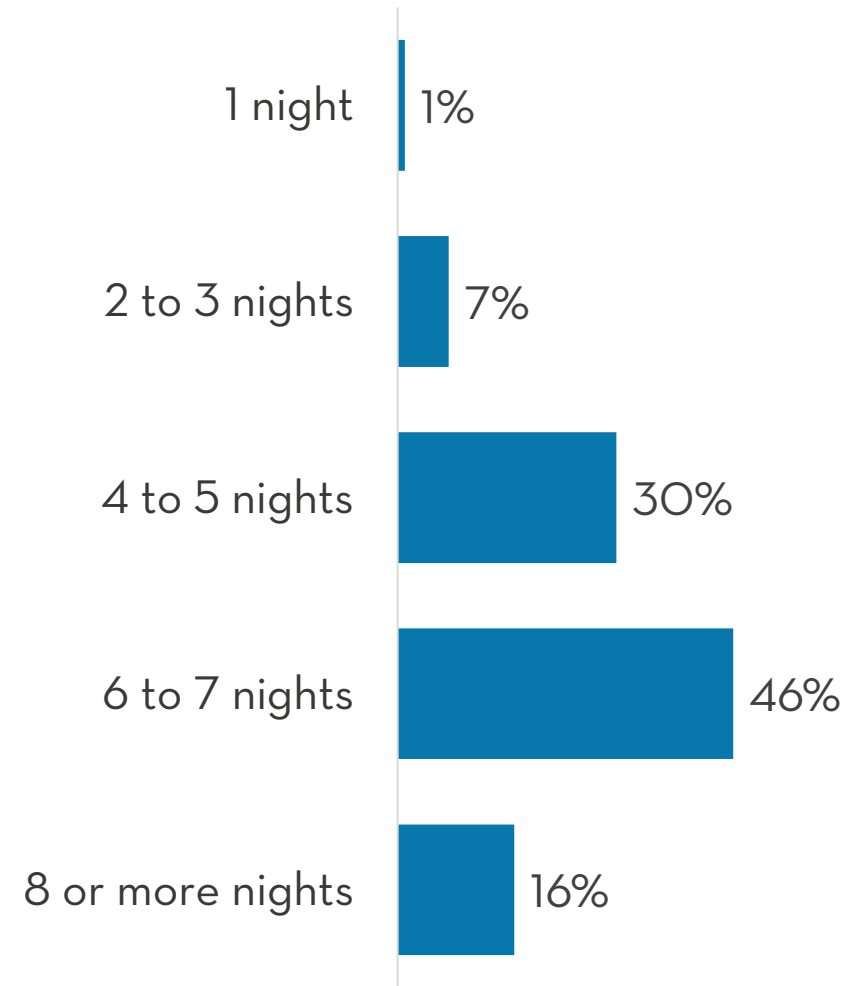
# LENGTH OF STAY



Summer visitors<sup>1</sup> stay an average of **6.3** nights<sup>2</sup> in Walton County (5.9 nights in 2024)



Summer visitors staying in paid accommodations spend an average of **6.2** nights<sup>2</sup> in Walton County (6.2 nights in 2024)



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

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

# NUMBER OF VISITS TO WALTON COUNTY

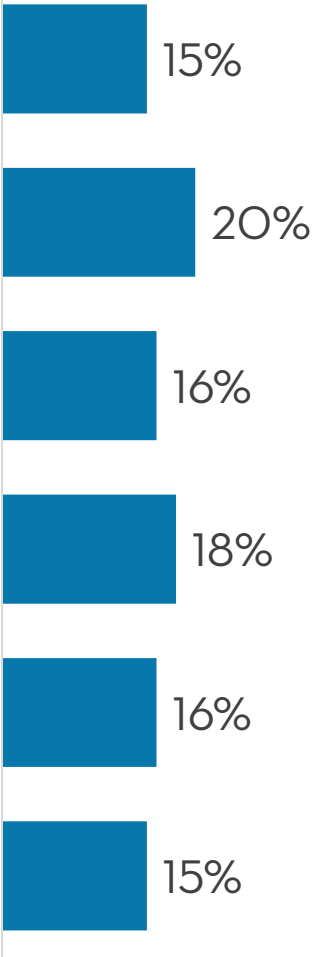


**15%** (+2% points from 2024) of Summer visitors are visiting for the first time

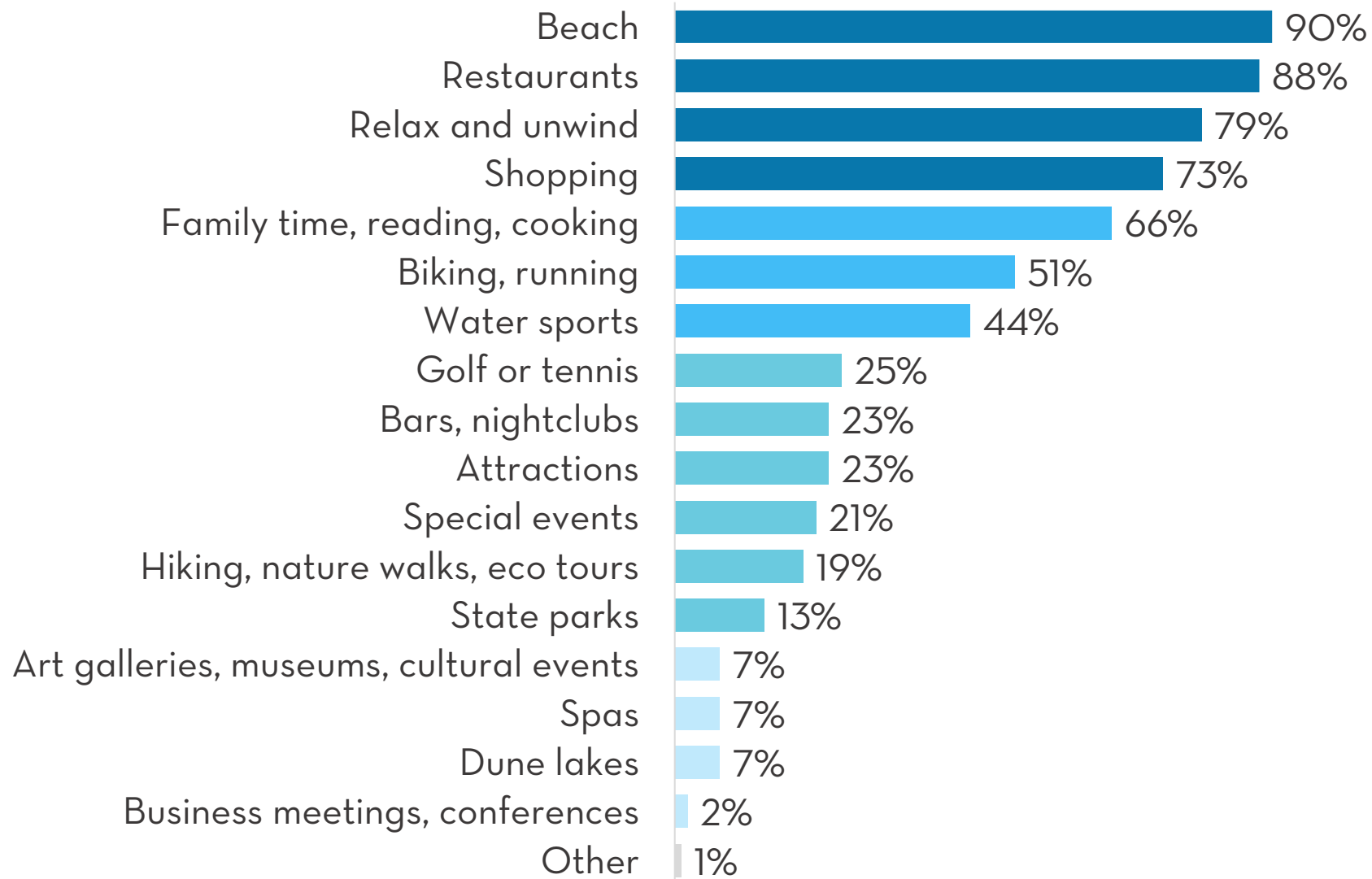


**31%** (-3% points from 2024) of Summer visitors have visited Walton County more than 10 times

That was my first time



# VISITOR ACTIVITIES<sup>1</sup>

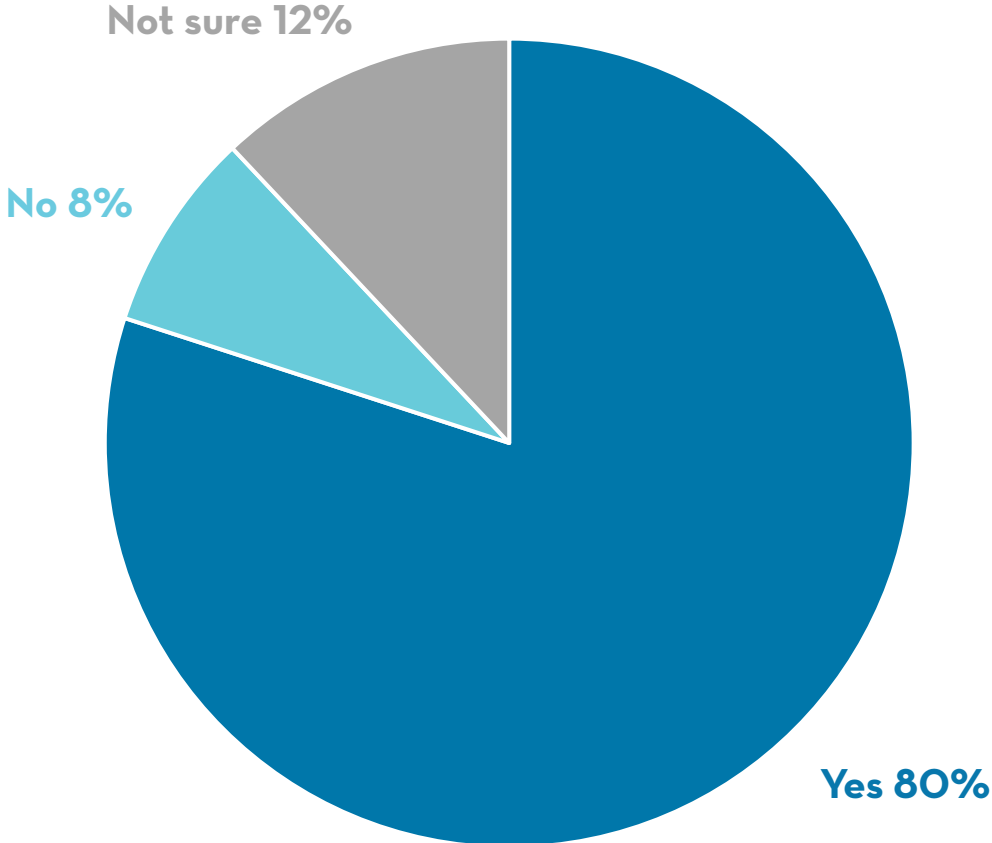


<sup>1</sup>Multiple responses permitted.

# BEACH SAFETY



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



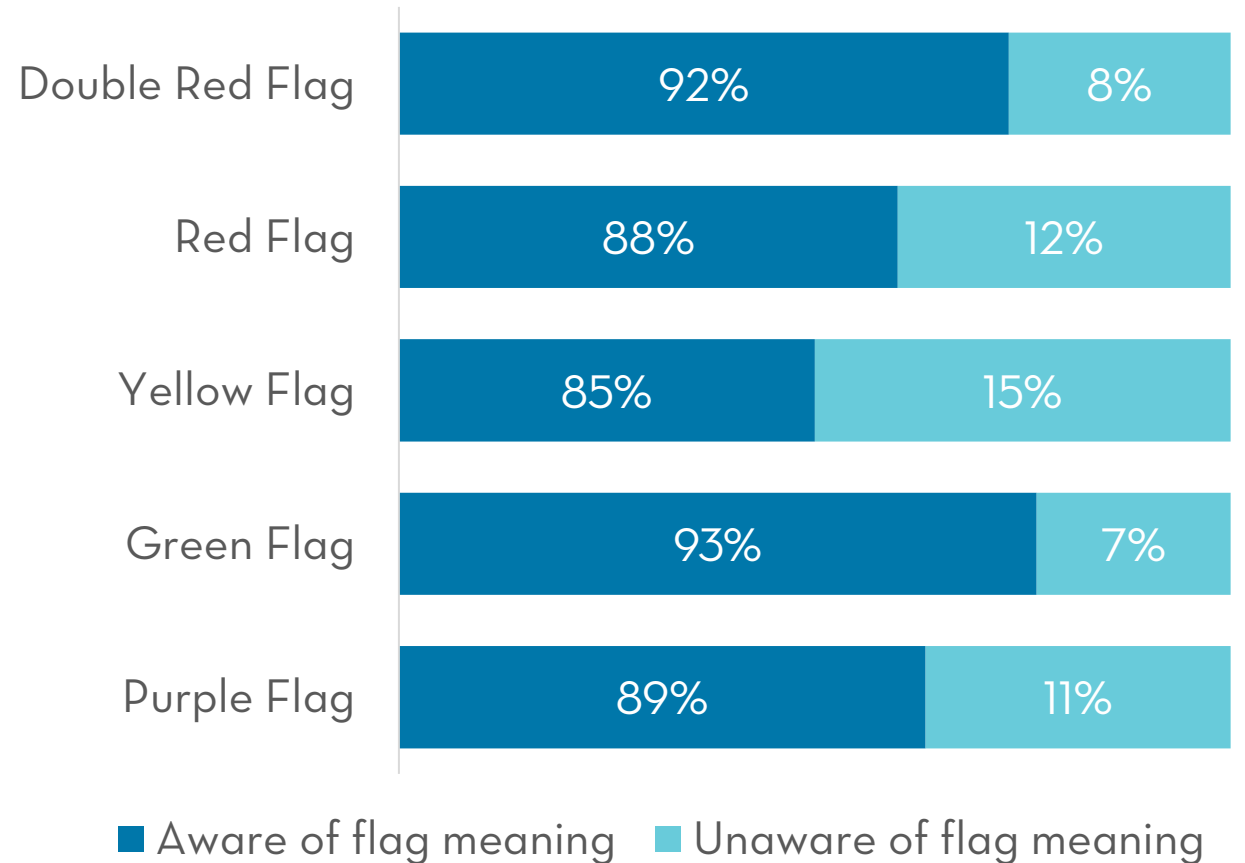
# BEACH FLAG AWARENESS



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



**70%** (+3% points from 2024) 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 EXPENSES<sup>1</sup>

- » The typical travel party spends **\$706** (\$742 in 2024) a day while in Walton County.
- » The typical travel party spends a total of **\$4,420** (\$4,370 in 2024) while visiting Walton County.
- » Compared to 2024, total trip expenditures per travel party increased slightly due to longer lengths of stay.

Spending Category <sup>1</sup>	Average Daily Expenditure	Total Trip Expenditure
Accommodations	\$304	\$1,910
Restaurants	\$134	\$840
Groceries	\$69	\$430
Shopping	\$96	\$600
Entertainment	\$43	\$270
Transportation	\$45	\$280
Other	\$15	\$90
<b>Total</b>	<b>\$706</b>	<b>\$4,420</b>

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

# VISITOR JOURNEY: POST-TRIP EVALUATION



# RATING AND LIKELIHOOD OF RETURNING TO WALTON COUNTY



Visitors gave Walton County a rating<sup>1</sup> of **9.2** (consistent with 2024) as a place to vacation

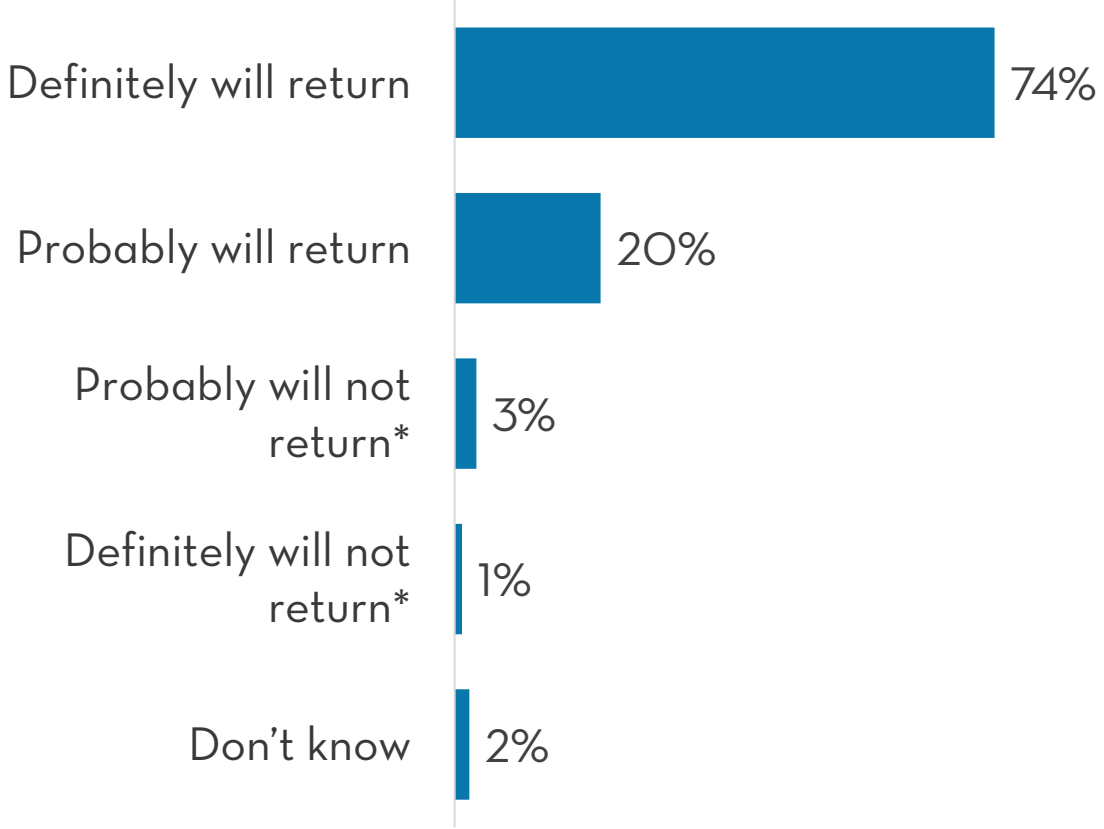


**Nearly 3 in 4** Summer visitors will definitely return to Walton County



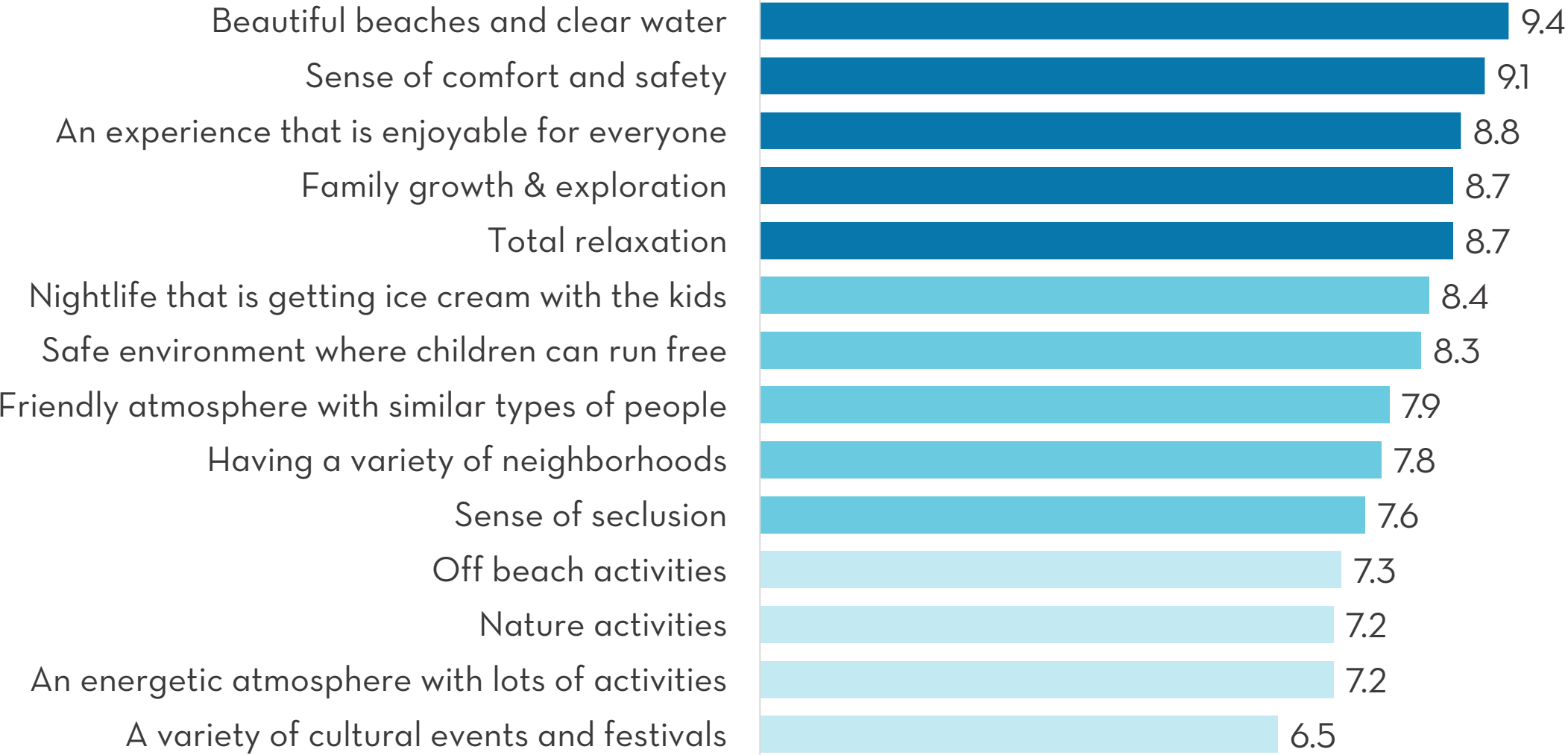
**Only 6%** of visitors are uncertain about returning. Top reasons include:

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



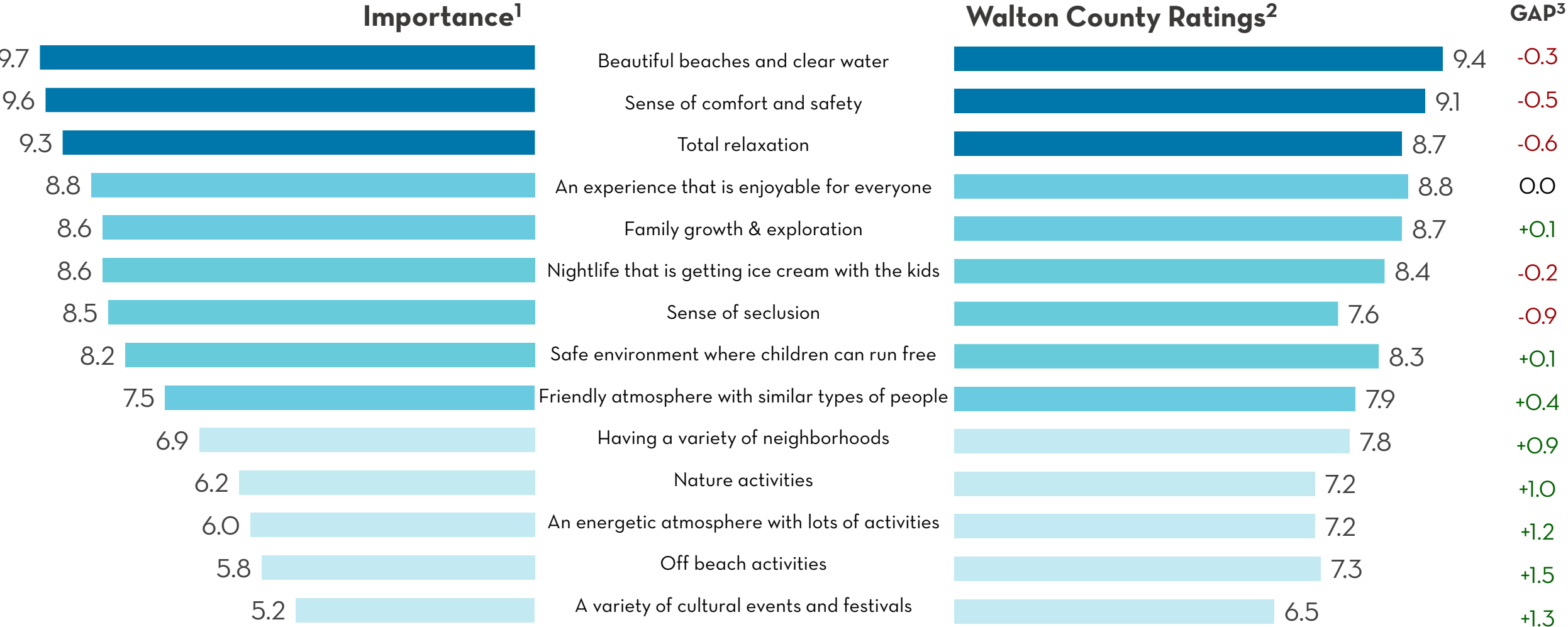
<sup>1</sup>10 = Excellent; 1 = Poor

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



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

# VACATION ATTRIBUTE IMPORTANCE VS. RATINGS



<sup>1</sup> Rated on a scale from 1 to 10 where 10 is very important and 1 is not at all important.  
<sup>2</sup> Rated on a scale from 1 to 10 where 10 is excellent and 1 is poor.  
<sup>3</sup> GAP equals the difference between the importance of an attribute and the rating of WC on that attribute. For example, a “Beautiful beaches and clear water” is extremely important to visitors with a score of 9.7. Visitors rated WC as 9.4 on its beaches. Hence, the GAP is -0.3.

# AREA DESCRIPTIONS



*“Bike riding, restaurants for kids, fun places to walk and shop, a perfect area to rent a boat. Our favorite place to go.”*

*“Absolutely a place to go.”*

*“Best family destination in Florida!”*

*“I have been to Waikiki, Maui, SoCal, the Caribbean, Mediterranean, and more beaches, and WaterColor is the best of all the beaches. We are Canadian, and we all love the US.”*

*“STUNNING! I love 30A. This is probably our tenth summer visiting the area. It's the only place we vacation to every single year. It's such a joy for my family and me!”*

*“Can be relaxing or action-packed. We like it!”*

*“Perfect for multigenerational families to get together in a beautiful, safe area with the prettiest beaches in the world.”*

# AREA DESCRIPTIONS



*"It is a beautiful place that is laid back, easy to get around, has everything you could need or want, and is great for the family to be together and off the devices."*

*"A quiet, safe place that we love to return to each year for our relaxing family vacation."*

*"Best place on Earth!"*

*"Gorgeous beaches, relaxing place, wonderful restaurants."*

*"A family tradition that we look forward to every year."*

*"It's a place where you can always find something unique to do, from water sports to shopping, and there are always some sort of festival going on. The beaches are beautiful white sands, and the ocean is a clear emerald green."*

*"Paradise without having to leave the continental U.S."*

# FEELINGS ASSOCIATED WITH WALTON COUNTY



*"Pure bliss."*

*"Beautiful."*

*"My toes in sand."*

*"Family bonds growing stronger."*

*"Tranquil and calm."*

*"Pleasure."*

*"My breath taken away by the sunsets."*

*"Refreshed."*

*"Awesomeness."*

*"Peace and rest for family to connect."*

*"Happy times."*

*"Joy."*

*"Sun kissed skin."*

# OPPORTUNITIES FOR IMPROVEMENT



*“Very safe, clean, and family-friendly towns. Expect very crowded beaches and limited beach space due to rental chair companies taking over the beach.”*

*“It used to be fabulous, but it's getting out of hand with the noise, golf carts, and kids (especially kids on golf carts). We used to come twice a year and always plan a large family gathering for one of them, but several folks don't like coming anymore.”*

*“Friendly, small town feel with big city crowds.”*

*“It's a great place to visit as we have been going for many years. We love Rosemary Beach, but this last time there were teenagers fighting in the street and loud parties all night. This was our first experience like this. We are wondering if it has become too big of a tourist hot spot and if it's losing its charm.”*

# WALTON COUNTY TOURISM

## Summer 2025 Visitor Tracking Study June - August 2025

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