

WALTON COUNTY TOURISM

Winter 2024 Visitor Tracking Study
December 2023 – February 2024



TABLE OF CONTENTS

Methodology	3
Executive summary	4
Seasonal snapshot	5
Visitor's journey	6
Economic impact	7
Pre-visit	12
Travel party profile	21
Trip experience	26
Post-trip evaluation	33
Yearly comparisons	37
Detailed findings	42
Pre-visit	43
Travel party profile	53
Trip experience	60
Post-trip evaluation	68





Visitor Tracking Study

This report is based on 625 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 December 2023 and February 2024.

EXECUTIVE SUMMARY



SEASONAL SNAPSHOT

Winter 2024

- Reflecting national tourism trends, post-COVID visitors are prioritizing travel while exercising economic caution by spending less during trips. In Walton County, a significant decrease in shopping spending by 37% per travel party per trip and entertainment spending by 31% per travel party per trip contributed to an overall decrease of 19.3% in direct spending compared to Winter 2023.
- Occupancy and room rates are down, but TDT and room nights are up due to more units being available.
- Despite the increase in available units, the number of visitors to Walton County decreased compared to Winter 2023 due to a decrease in travel party size and occupancy.
- The top three attributes considered most important to Walton County visitors (beautiful beaches and clear water, a sense of comfort and safety, and total relaxation) also received the highest ratings for Walton County.
- More visitors are finding information about Walton County from various other social media accounts (+5% points from 2023)

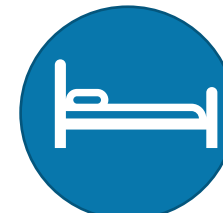


499,300

TOTAL VISITORS

vs. 2023

↓ 4.6%



603,300

ROOM NIGHTS

↑ 0.7%



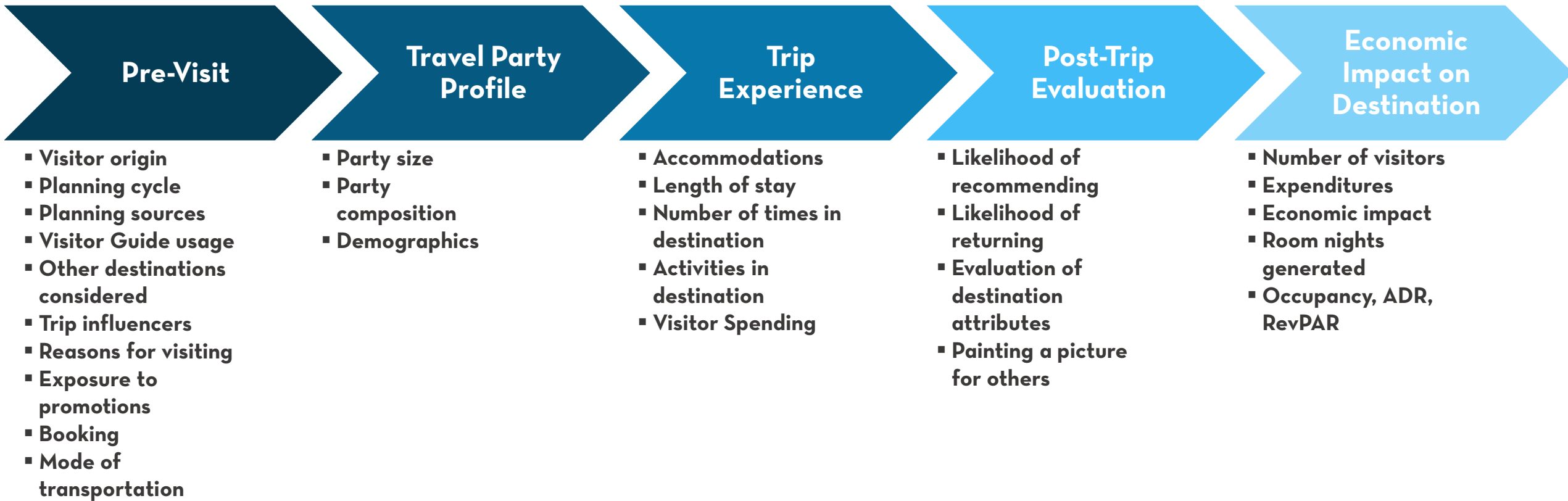
\$ 591,076,800

DIRECT SPENDING

↓ 19.3%

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 - WINTER 2023 VS. 2024

- » Reflecting national tourism trends, post-COVID visitors are prioritizing travel while exercising economic caution by spending less during trips. In Walton County, a significant decrease in shopping spending by 37% per travel party per trip and entertainment spending by 31% per travel party per trip contributed to an overall decrease of 19.3% in direct spending compared to Winter 2023.
- » Occupancy and room rates are down, but TDT and room nights are up due to more units being available.
- » Despite the increase in available units, the number of visitors to Walton County decreased compared to Winter 2023 due to a decrease in travel party size and occupancy.

Visitor Metrics	Winter 2023	Winter 2024	% Δ
Room nights	599,400	603,300	+0.7%
Total visitors	523,500	499,300	-4.6%
TDT collections	\$4,419,693	\$4,558,394	+3.1%
Direct spending	\$732,754,800	\$591,076,600	-19.3%
Economic impact*	\$1,062,494,500	\$862,971,800	-18.8%
Occupancy	35.6%	33.3%	-6.5%
Room rates	\$203.73	\$196.38	-3.6%
RevPAR	\$72.53	\$65.39	-9.8%

Data sources: Walton County government, properties in Walton County that rent to visitors, Key Data, and visitor and property surveys by Downs & St. Germain Research.

*The economic impact multiplier for Walton County in 2024 is 1.46. In 2023 it was 1.45.

ECONOMIC IMPACT - LODGING STATISTICS

33.3%

Occupancy

↓ 6.5%

\$196.38

ADR

↓ 3.6%

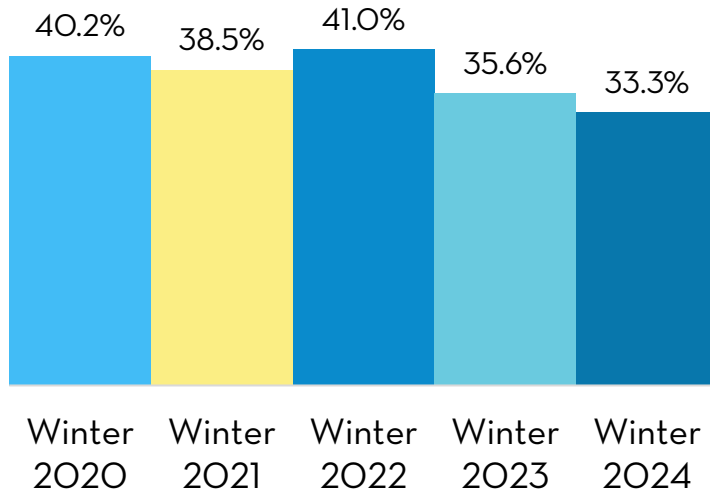
\$65.39

RevPAR

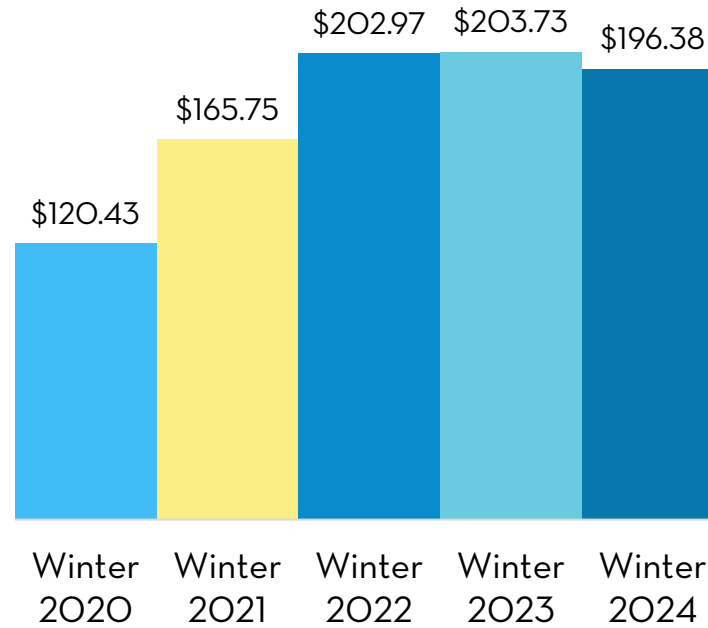
↓ 9.8%

ECONOMIC IMPACT - LODGING METRICS

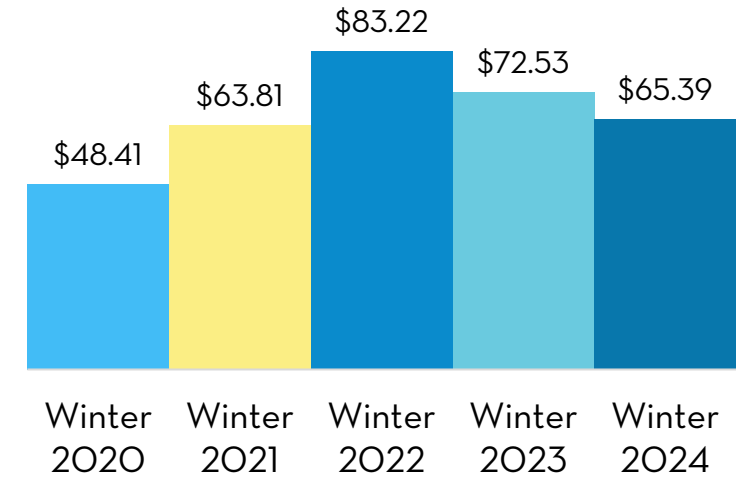
Occupancy Rate



Average Daily Rate

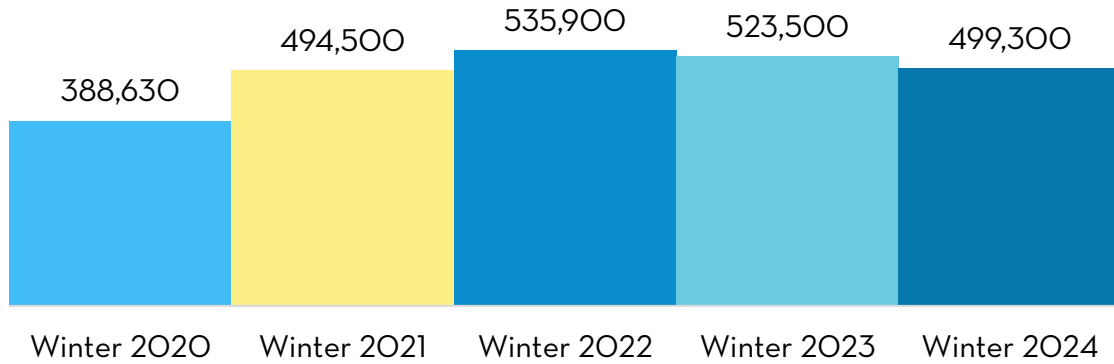


Revenue per Available Room

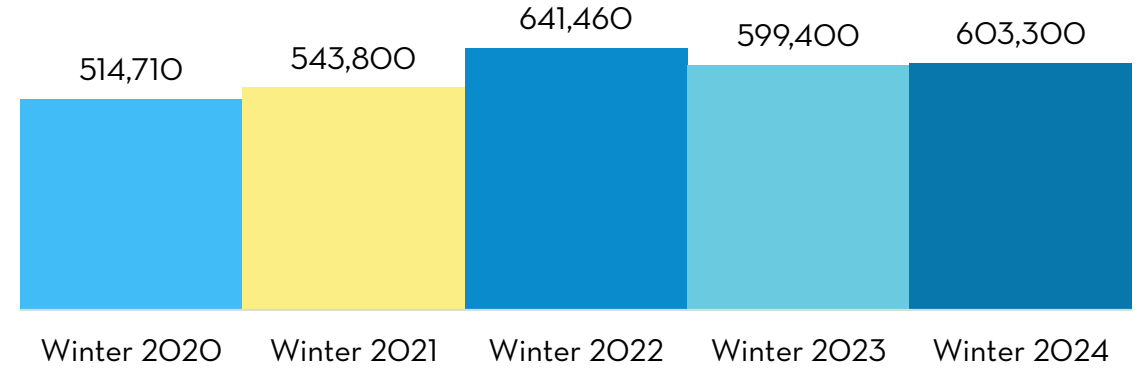


ECONOMIC IMPACT - IMPACT OF TOURISM

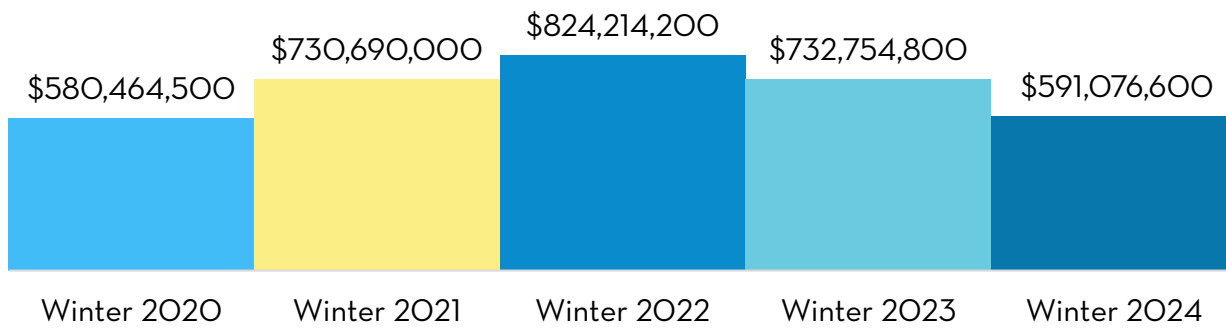
Visitors



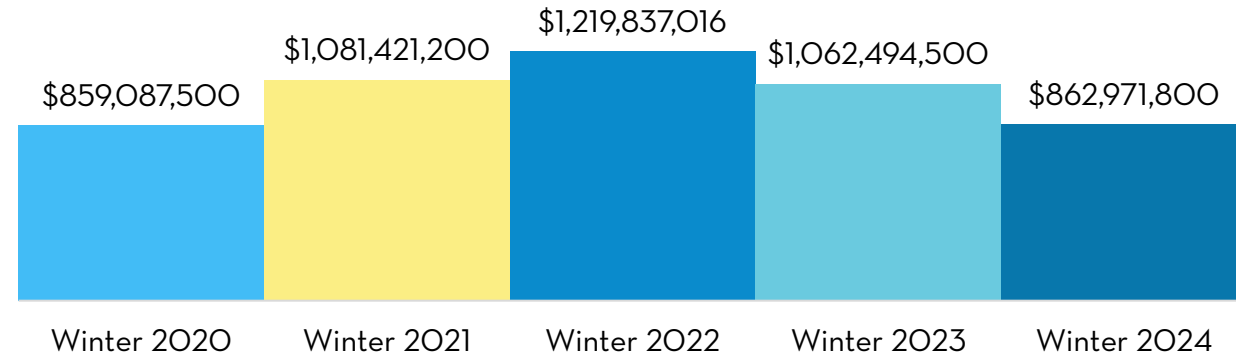
Room Nights



Direct Spending



Economic Impact



VISITOR JOURNEY: PRE-VISIT



PLANNING CYCLE

- » **Over 3 in 5** visitors plan a Walton County Winter vacation at least 3 months in advance
- » Average trip planning cycle began **96 days** before the trip (**95 days in 2023**)
- » **67%** (+7% points from 2023) of Winter visitors considered only 1 of the Walton County beach neighborhoods as opposed to deciding among several



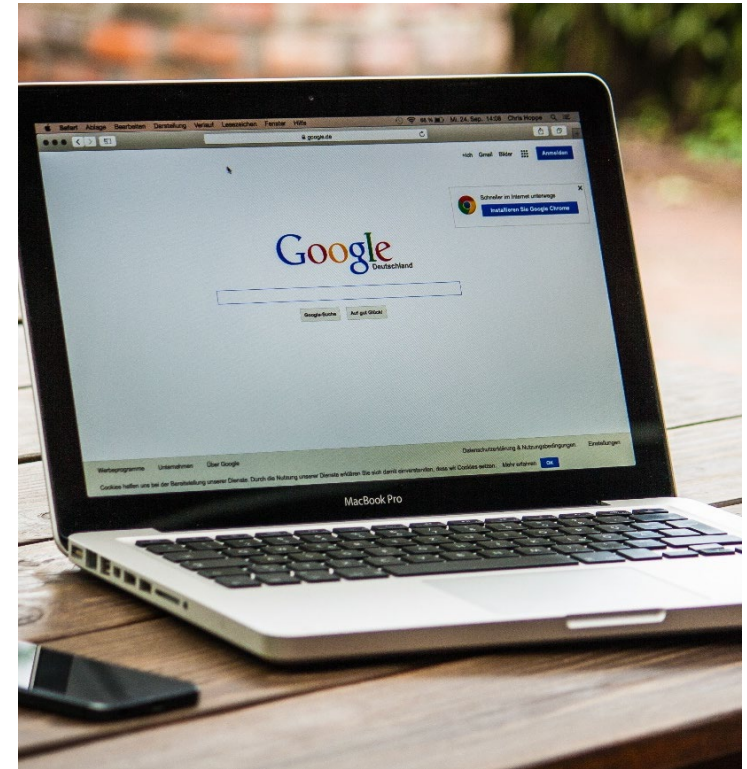
TOP TRIP PLANNING SOURCES*



Vacation rental website **45%**
(48% in 2023)



Friends/family **34%**
(33% in 2023)



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

WALTON COUNTY VISITOR GUIDE

- » **21%** of visitors viewed (mostly online¹) Walton County's Visitors Guide before going to the area
- » Visitors Guide received a rating² of **8.7 out of 10** (+0.5 points from 2023)



¹17% used the online version & 4% used the print version.

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

TOP REASONS FOR VISIT*



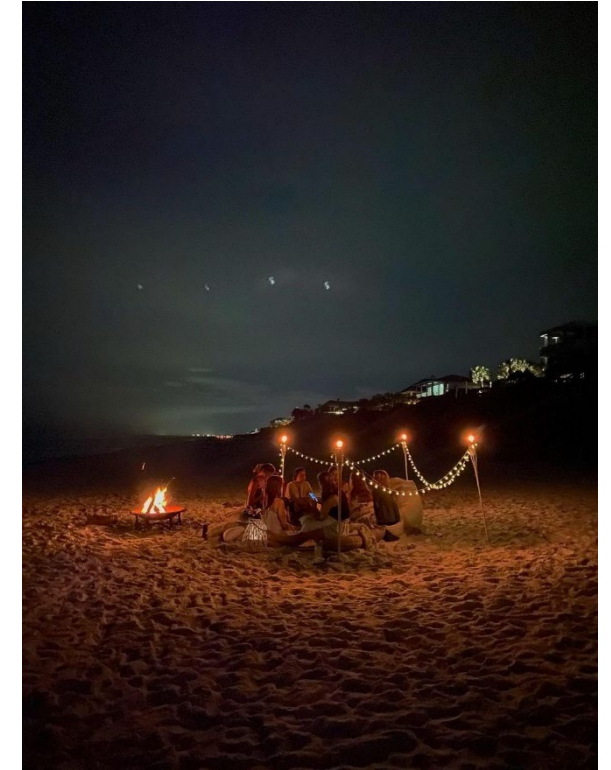
Relax & unwind **53%**
(50% in 2023)



Family vacation **48%**
(49% in 2023)



Annual routine **28%**
(25% in 2023)



Special occasion **16%**
(14% in 2023)

ADVERTISING RECALL

- » **24%** (+1% points from 2023) of visitors recalled promotions about Walton County
- » This information influenced **7%** (-1% point from 2023) of all visitors to visit Walton County



TOP WALTON COUNTY PROMOTIONS¹

Base: 24% of visitors who noticed advertising

Other² social media accounts **26%**
(21% in 2023)



Magazine ad **22%**
(17% in 2023)



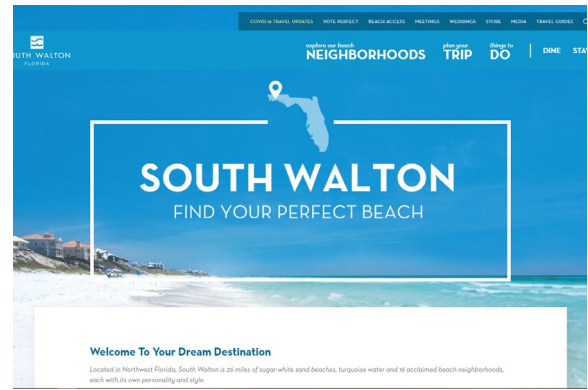
Television **21%**
(35% in 2023)



Magazine Article **20%**
(19% in 2023)



VisitSouthWalton.com **19%**
(21% in 2023)



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

TOP BOOKING SOURCES



Vacation Rental Company

63%



Directly with hotel/condo

22%



VRBO/HomeAway

7%

VISITOR TRANSPORTATION

- » **74%** of visitors drove to Walton County
- » **26%** (+2% points from 2023) who flew used the following airports:

68%

Northwest Florida Beaches
International Airport



25%

Destin-Ft. Walton Beach Airport



3%

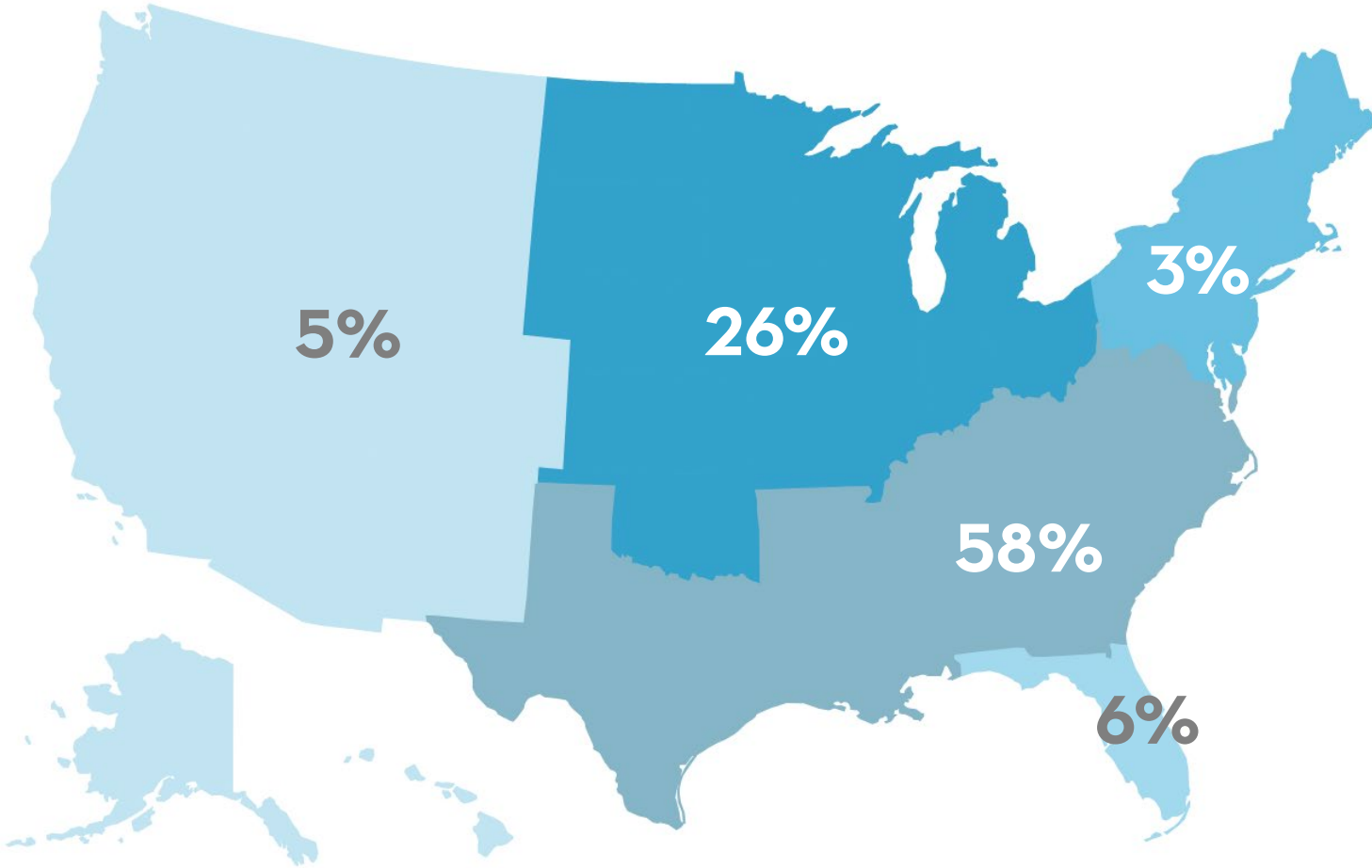
Pensacola International Airport



VISITOR JOURNEY: TRAVEL PARTY PROFILE

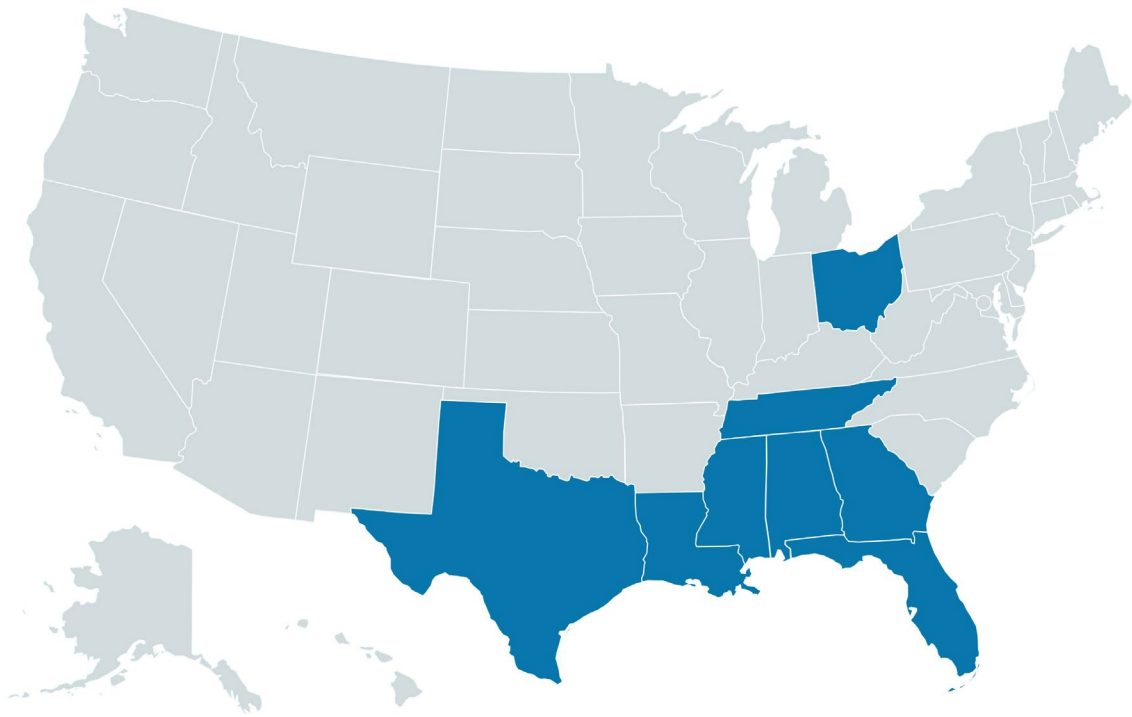


ORIGIN OF WINTER VISITORS



2% of visitors traveled to Walton County from outside of the U.S.

ORIGIN OF WINTER VISITORS



63% of visitors are from 8 states

13% Georgia

11% Tennessee

9% Texas

8% Alabama

7% Mississippi

6% Florida

5% Louisiana

4% Ohio

43% of visitors are from 10 markets

12% Atlanta

7% Nashville

3% Dallas-Fort Worth

3% Columbus, OH

3% Birmingham

3% Minneapolis-Saint Paul

3% Chicago

3% Mobile-Pensacola

3% Houston

3% New Orleans

TRAVEL PARTY SIZE AND COMPOSITION

The typical visitor traveled in a party composed of **3.5** people (down from 4.0 in 2023)



33% traveled with at least one person under the age of 20 in their travel party (-3% points from 2023)



WINTER VISITOR PROFILE

The typical Walton County Winter visitor:

- » **55** years old (54 years old in 2023)
- » Median household income of **\$147,400** (-\$2,600 from 2023)
- » From the Southeast including Florida (**64%**) (+3% points from 2023)



VISITOR JOURNEY: TRIP EXPERIENCE



TOP ACCOMMODATIONS

55% Condos, rental houses, etc.



17% Personal home/condo



11% Hotels



LENGTH OF STAY

- » Visitors¹ spent **7.1** nights² in Walton County (-0.2) from 2023)
- » Visitors staying in paid accommodations spent an average of **8.5** nights² in Walton County (-0.6 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%** (+2% points from 2023) were first-time visitors
- » **38%** (+3% points from 2023) had visited more than 10 times



TOP VISITOR ACTIVITIES*

Restaurants **92%**
(89% in 2023)



Beach **87%**
(87% in 2023)



Relax and unwind **79%**
(79% in 2023)



Shopping **76%**
(70% in 2023)



Family time, reading, cooking **64%**
(63% in 2023)



Biking, running **52%**
(46% in 2023)



*Multiple responses permitted.

BEACH SAFETY

- » **74%** of Winter visitors know there are flags posted along the beaches to indicate how safe it is to go into the water
- » **Over 4 in 5** Winter visitors are aware of the beach flag warning meanings
- » **63%** (+2% points from 2023) of Winter visitors are aware of the consequences of entering the Gulf during double red flag conditions



TRAVEL PARTY EXPENDITURES¹

- » Travel parties spent **\$546** a day
- » Travel parties spent **\$3,890** on their trip



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

VISITOR JOURNEY: POST TRIP EVALUATION



VISITOR SATISFACTION

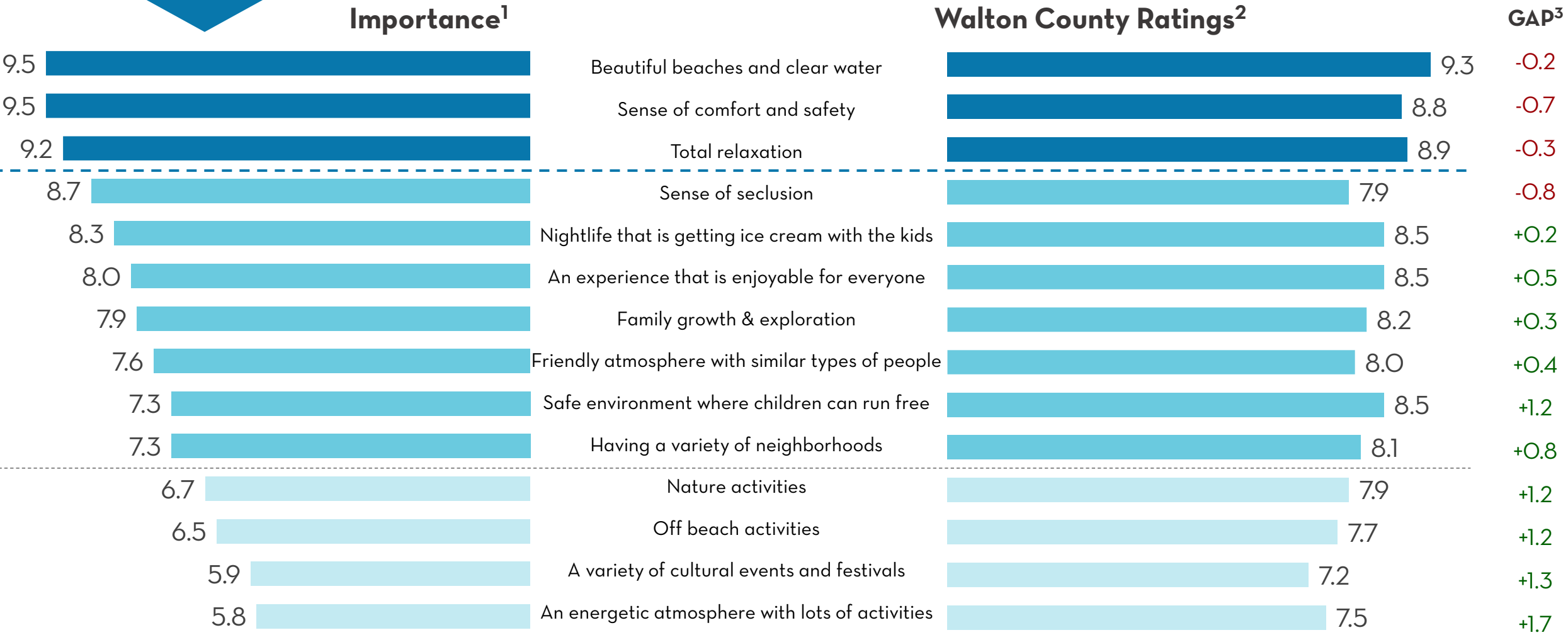
- » Visitors gave Walton County a rating¹ of **9.3** (+0.1 points from 2023) as a place to vacation
- » **79%** (+4% points from 2023) will definitely return to Walton County²



¹10 = Excellent; 1= Poor

²2% of all visitors will not return to Walton County for the following reasons:
1. Too expensive 2. Parking was a problem 3. Not enough to do during the day

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 9.5. Visitors rated WC as 9.3 on its beaches. Hence, the GAP is -0.2.

VISITOR DESCRIPTIONS OF WALTON COUNTY

"I would describe South Walton as the perfect place to take your family on a relaxing and beautiful beach trip. South Walton feels like visiting an out-of-country luxury destination while still being in the US."



"My husband and I travel across the country & the world but feel you truly can't beat the quality of accommodations, dining options, and walkability to the most beautiful beaches. We choose to celebrate most of milestones & relaxation along 30A."

"South Walton is an American oasis with beautiful beaches - a destination for ultimate relaxation."



YEARLY COMPARISONS



VISITOR PROFILE - WINTER 2023 VS. 2024

Visitor Metrics	Winter 2023	Winter 2024
Travel party	4.0	3.5
Kids <20	36%	33%
Median age	54	55
Estimated median household income	\$150,000	\$147,400
Stayed in condo/rental house	64%	55%
Drove	76%	74%
Nights spent	7.3	7.1
Direct expenditures (travel party for entire trip)	\$5,320	\$3,890
1st time visitor	12%	14%
10+ visits to Walton County	35%	38%

VISITOR PROFILE - WINTER 2023 VS. 2024

Top Origin States	Winter 2023	Winter 2024
Georgia	14%	13%
Tennessee	10%	11%
Texas	9%	9%
Alabama	9%	8%
Mississippi	4%	7%

Origins - Regions	Winter 2023	Winter 2024
Southeast	54%	58%
Midwest	28%	26%
Florida	7%	6%
West	5%	5%
Northeast	3%	3%
International	3%	2%

VISITOR PROFILE - WINTER 2023 VS. 2024

Top Visitor Activities	Winter 2023	Winter 2024
Restaurants	89%	92%
Beach	87%	87%
Relax and unwind	79%	79%
Shopping	70%	76%
Family time, reading, cooking	63%	64%
Biking, running	46%	52%
Golf or tennis	30%	32%
Special events	30%	31%
Hiking, nature walks, eco tours	25%	30%
Bars, nightclubs	33%	30%
Water sports	18%	23%
State parks	23%	21%
Attractions	19%	21%
Spas	9%	10%
Dune lakes	11%	10%
Art galleries, museums, cultural events	8%	9%
Business meetings, conferences	9%	8%
Other	3%	4%

VISITOR PROFILE - WINTER 2023 VS. 2024

Visitor Metrics	Winter 2023	Winter 2024
Will return to Walton County	95%	96%
Rating for overall experience¹	9.2	9.3
Viewed Visitors Guide²	21%	21%
Planned trip 6+ months out	26%	21%
Used VisitSouthWalton.com	12%	12%
Used 1 of 16 beaches' websites	15%	13%
Use the term "South Walton"	14%	14%

DETAILED FINDINGS



VISITOR JOURNEY: PRE-VISIT



PLANNING CYCLE



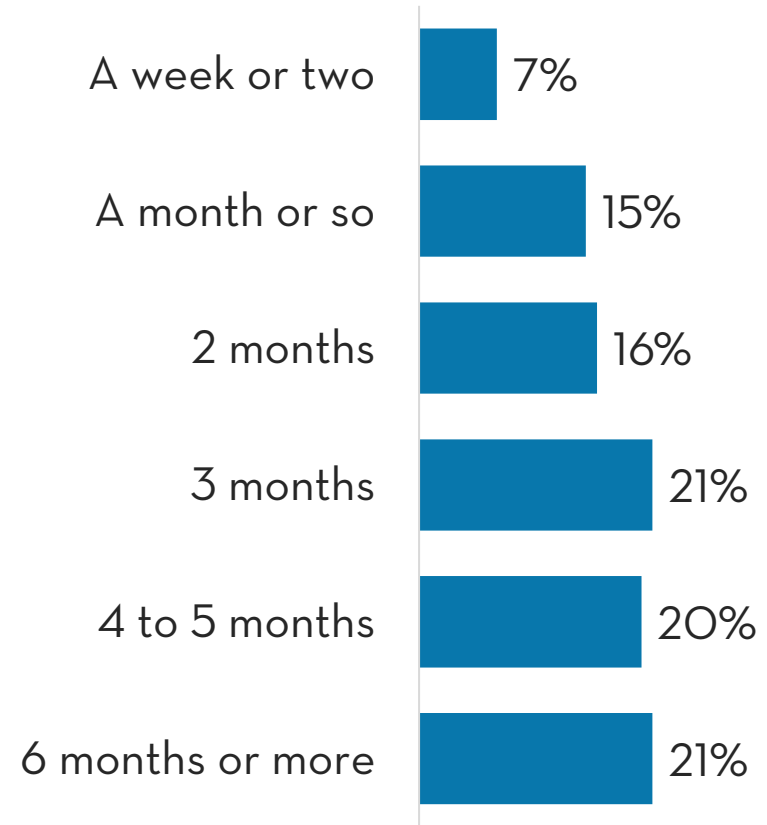
Over 3 in 5 visitors plan a Winter Walton County vacation at least **3 months** in advance



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



Average trip planning cycle began **96 days** before the trip (**95 days** in 2023)



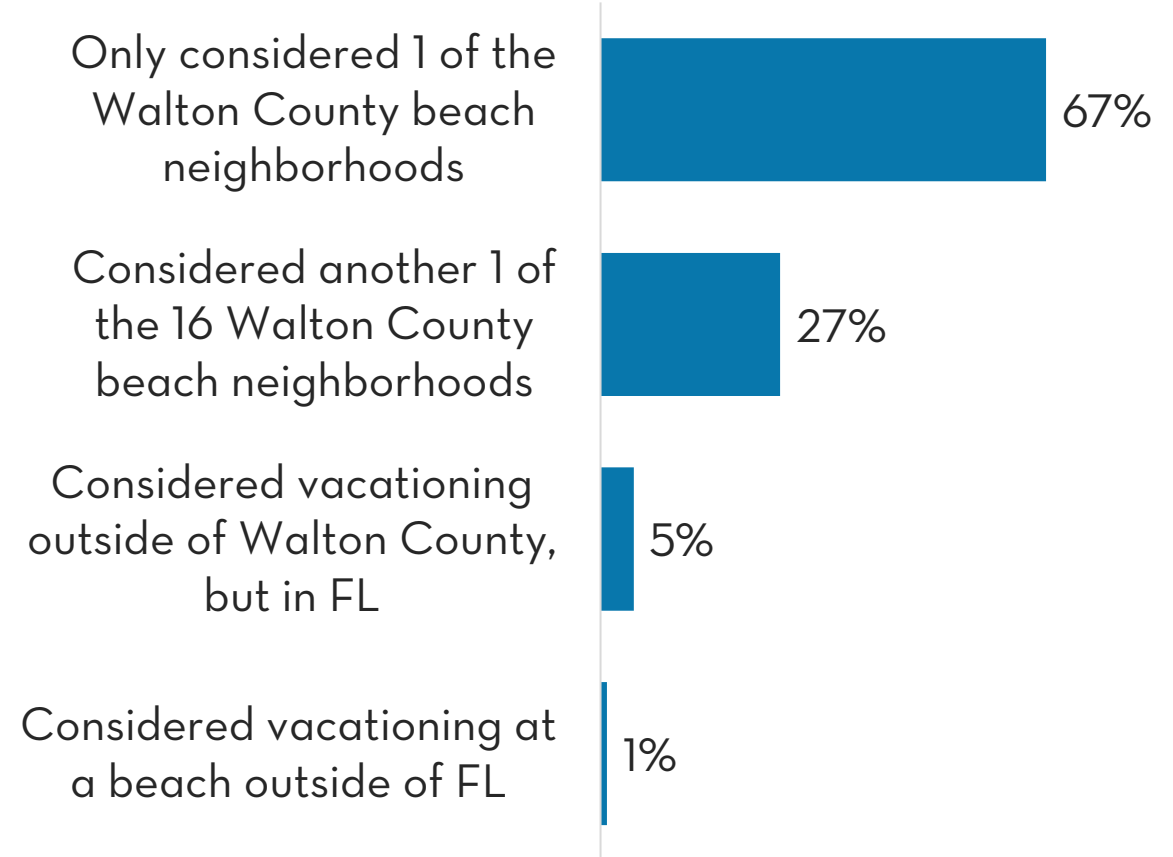
OTHER DESTINATIONS CONSIDERED



Over 2 in 3 (+7% points from 2023) of Winter visitors only considered going to the Walton County beach neighborhood where they stayed



14% use the term “South Walton” when referring to the area. Loyal visitors are more likely to refer the destination as “South Walton” than first time visitors.

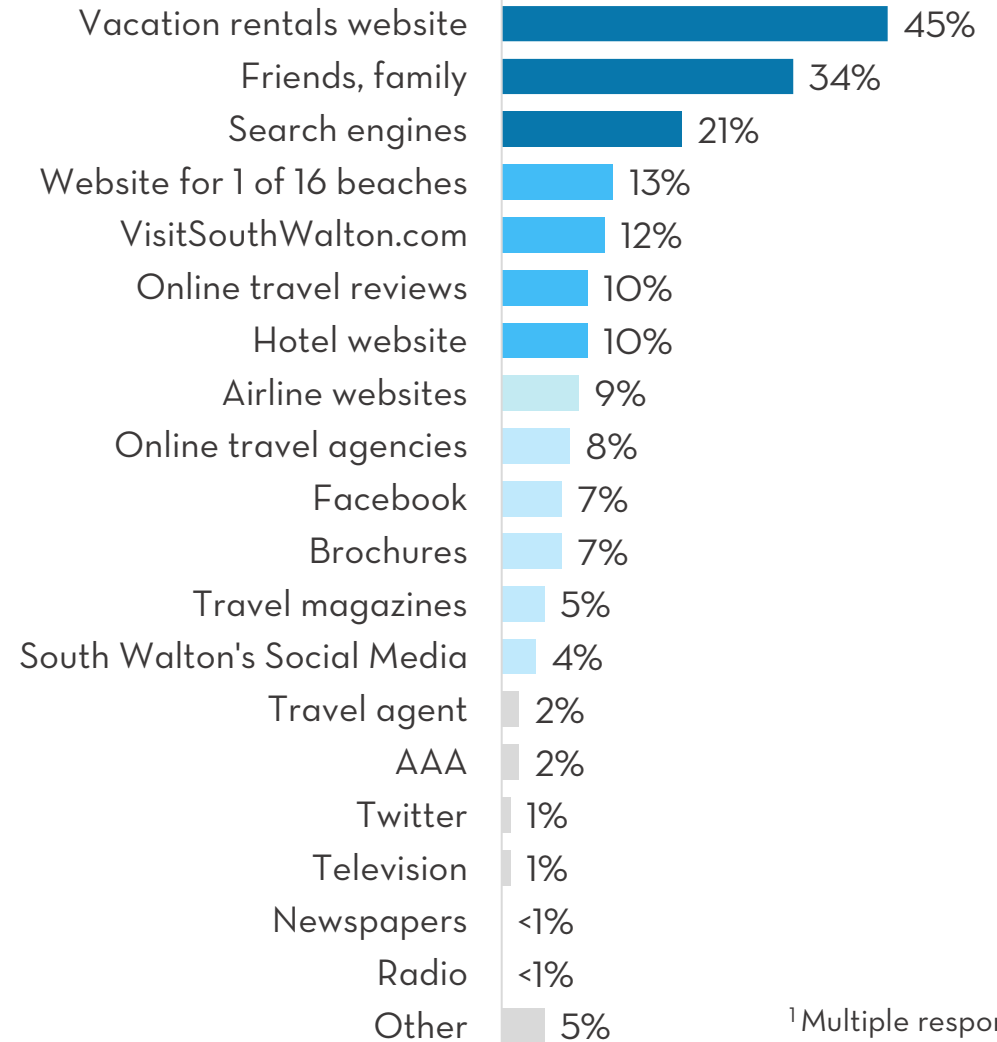


TRIP PLANNING SOURCES¹

45% 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



¹Multiple responses permitted.

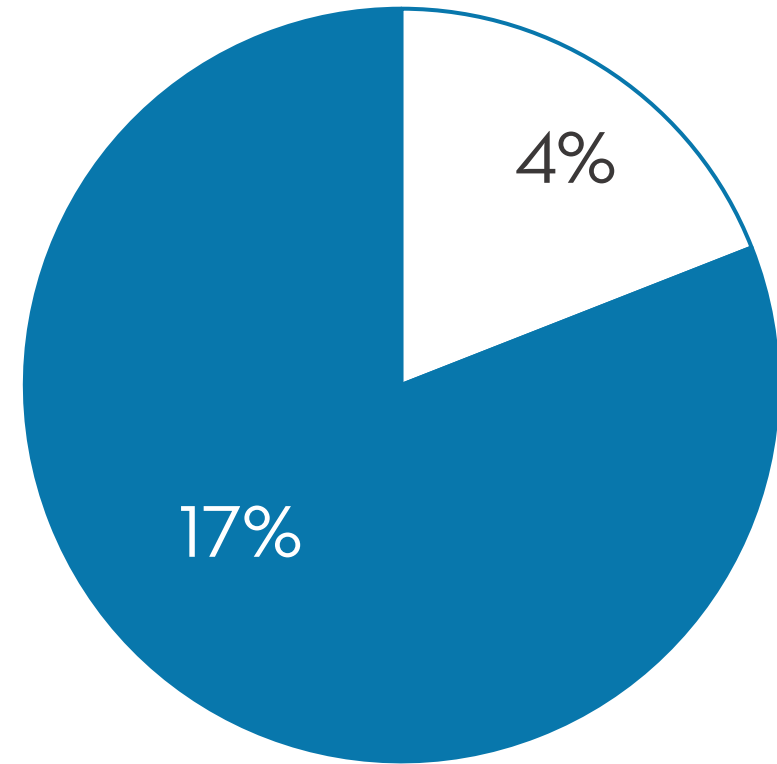
WALTON COUNTY VISITOR GUIDE



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



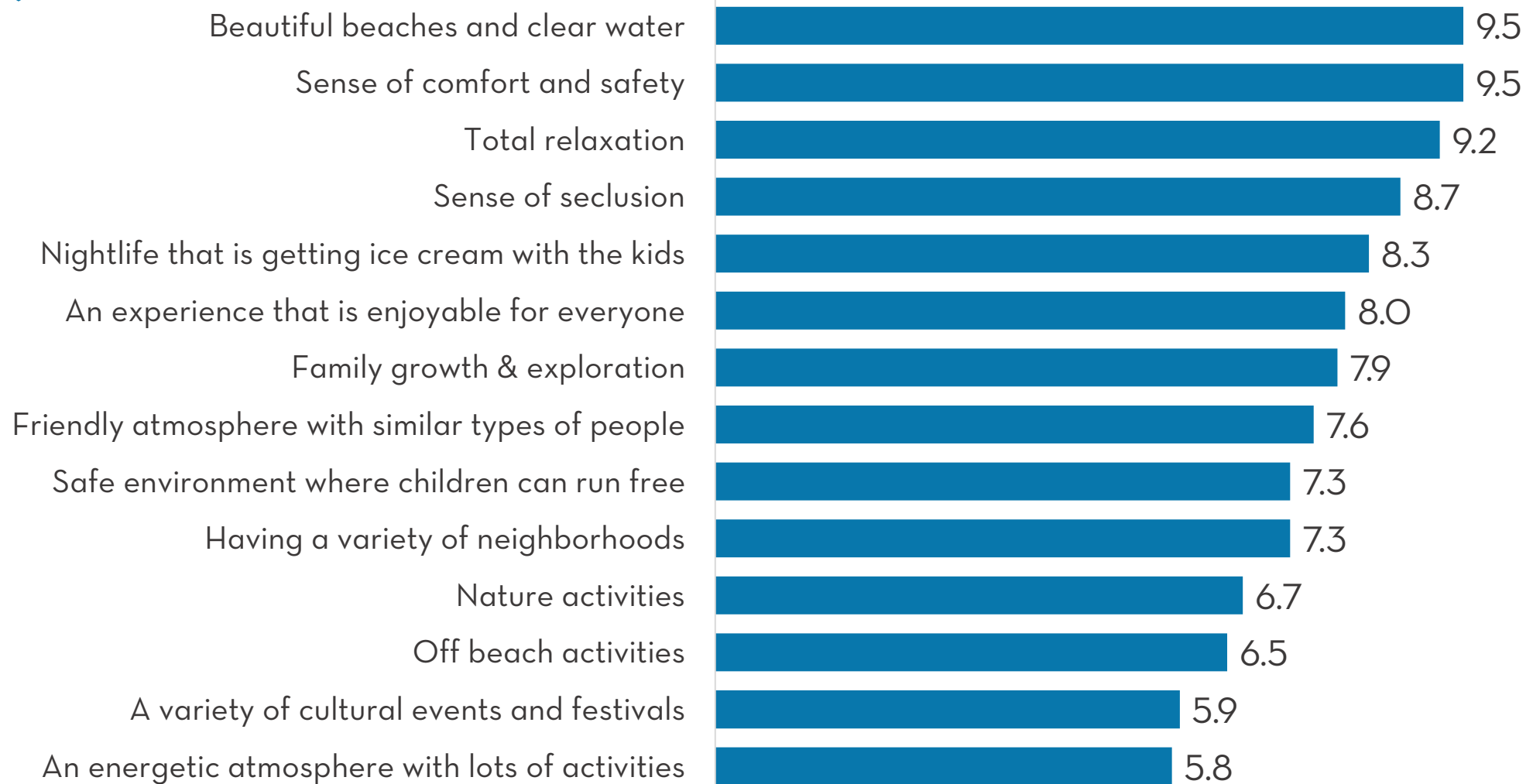
Visitors Guide received a rating of **8.7 out of 10**¹ (+0.5 points from 2023)



□ 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.

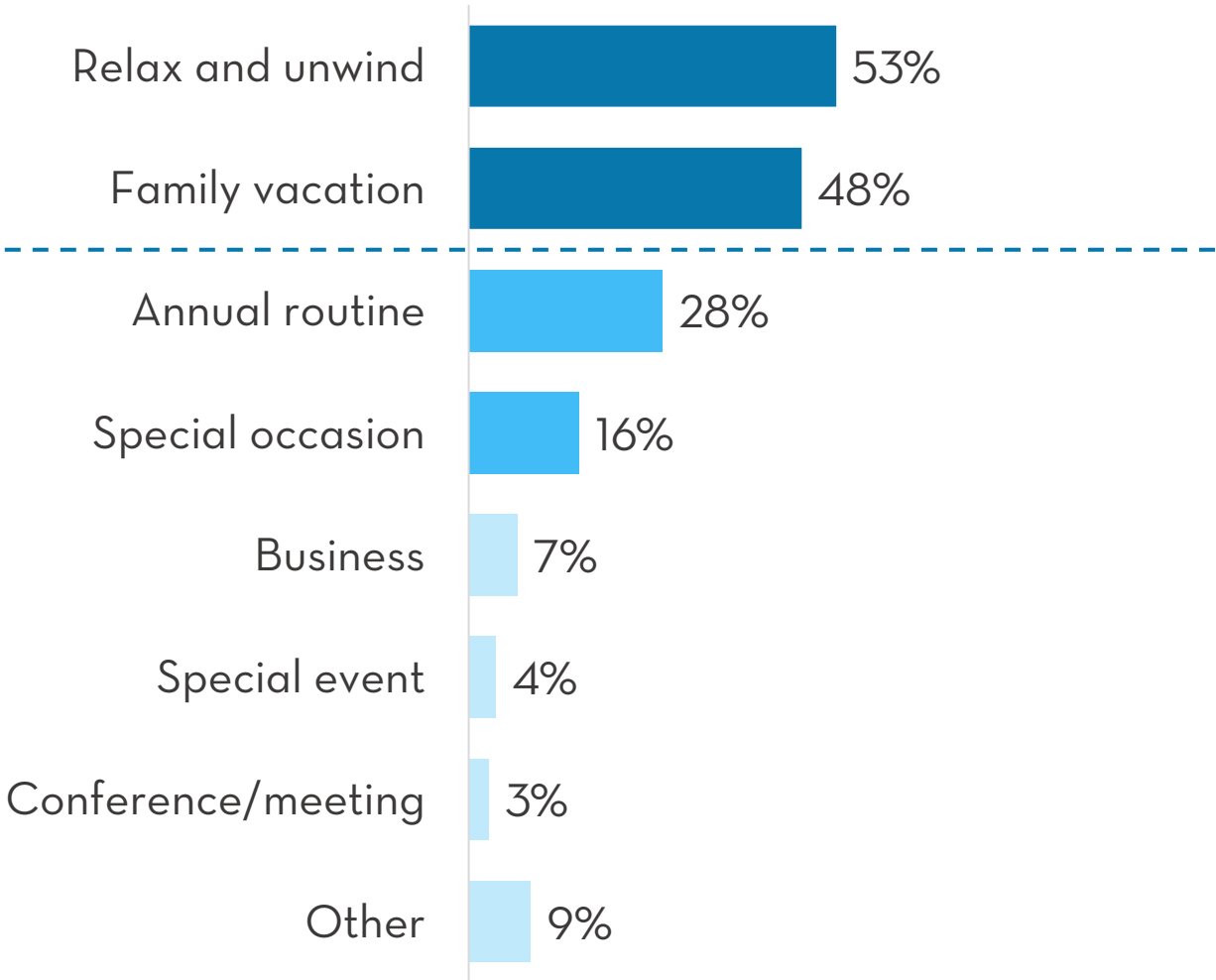
REASONS FOR VISITING¹



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



Nearly half of Winter visitors came for a **family vacation**



¹Multiple responses permitted.

WALTON COUNTY PROMOTIONS¹



24% (+1% points from 2023) of Winter visitors recalled advertising, promotions, or travel stories for Walton County

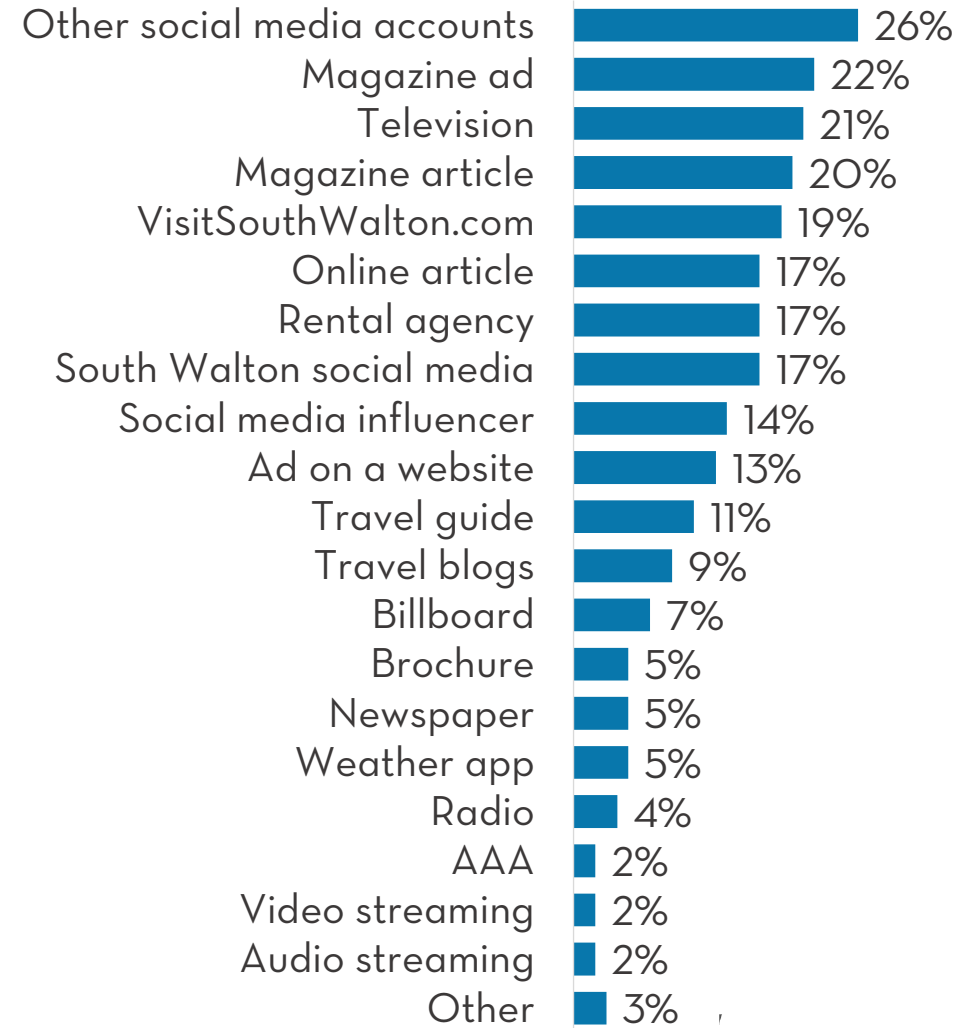


This information influenced **7%** (-1% points from 2023) of all visitors to visit Walton County



26% (+5% points from 2023) Winter visitors recalled information about the destination on **other² social media accounts**

Base: **24%** of visitors who recalled advertising



¹Multiple responses permitted.

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

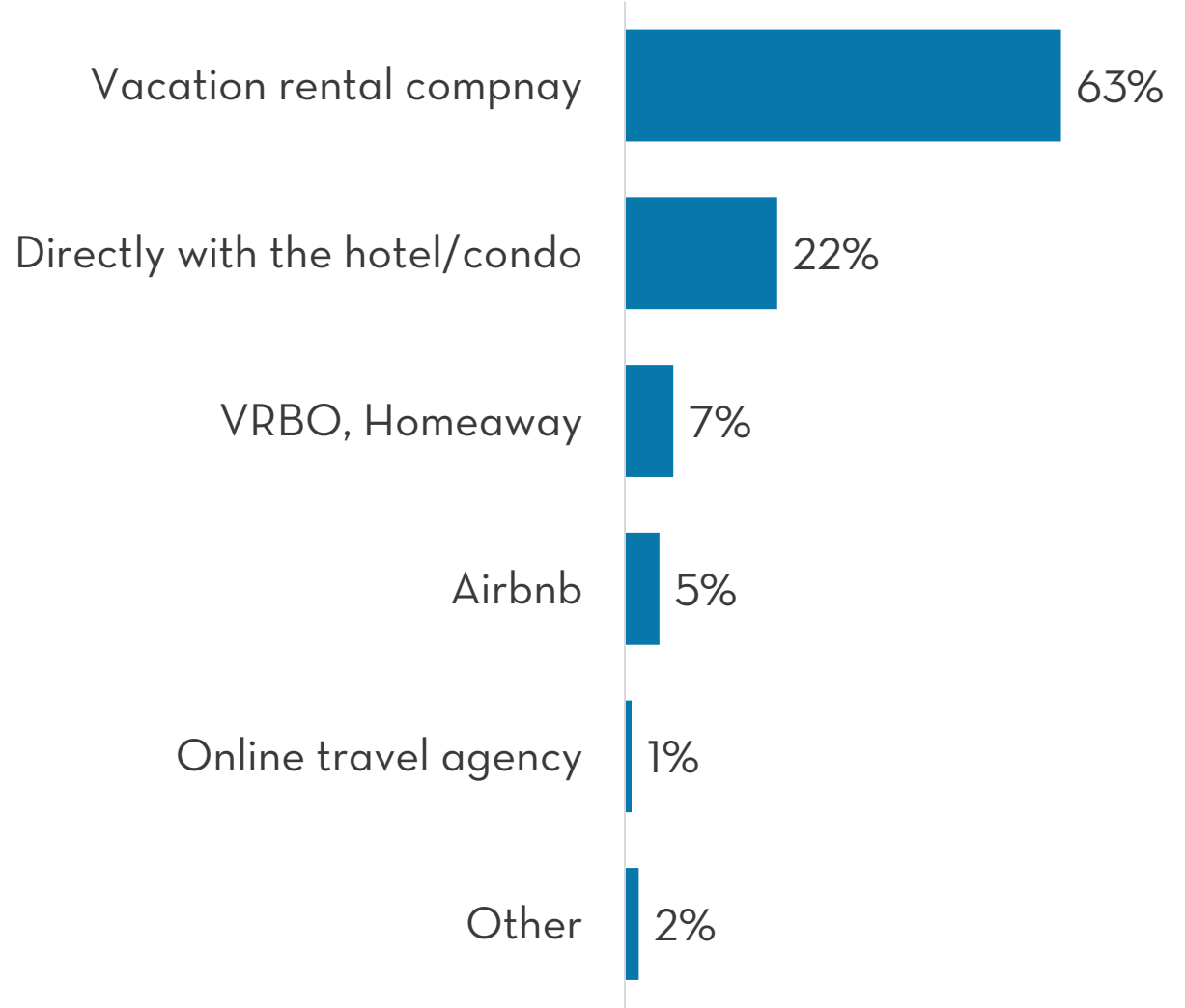
BOOKING ACCOMMODATIONS



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



Over 1 in 5 Winter visitors booked **directly with a hotel or condo**



VISITOR TRANSPORTATION

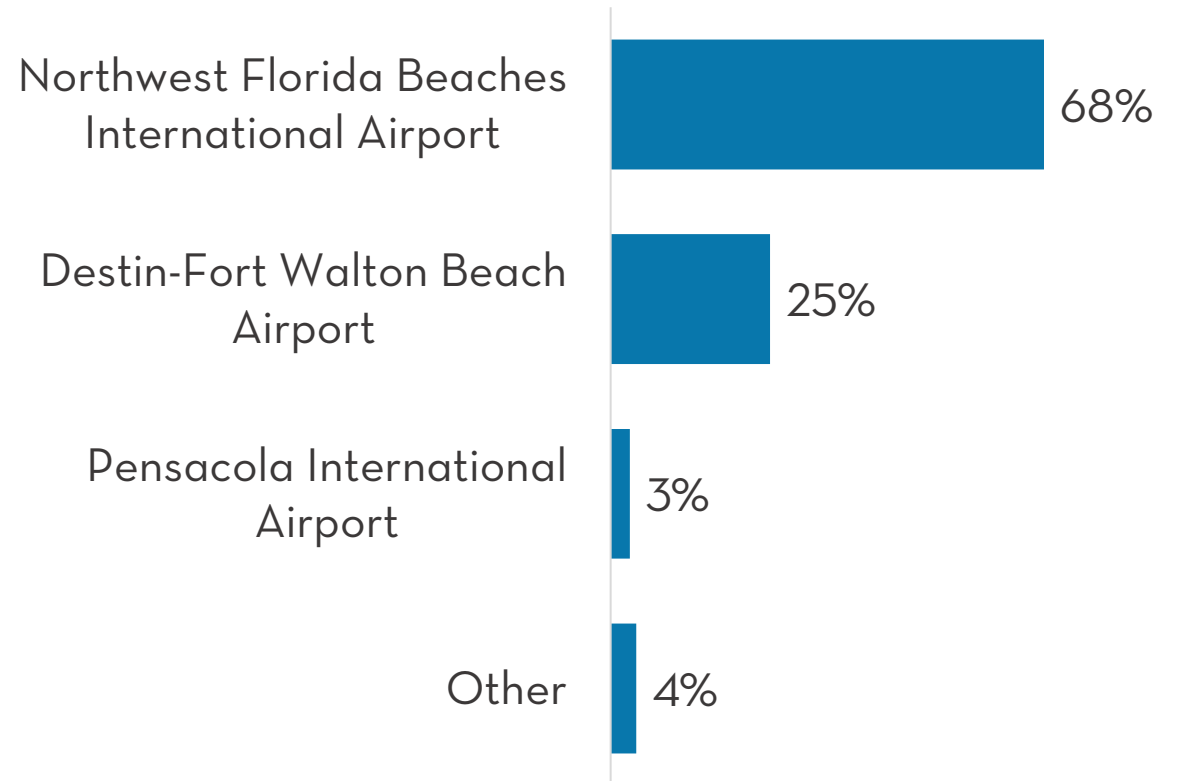


74% (-2% points from 2023) of Winter visitors drove to Walton County



25% (+2% points from 2023) of those who drove were aware that there were direct flights from their city to the Walton County area, and **24%** were not sure if there were direct flights available

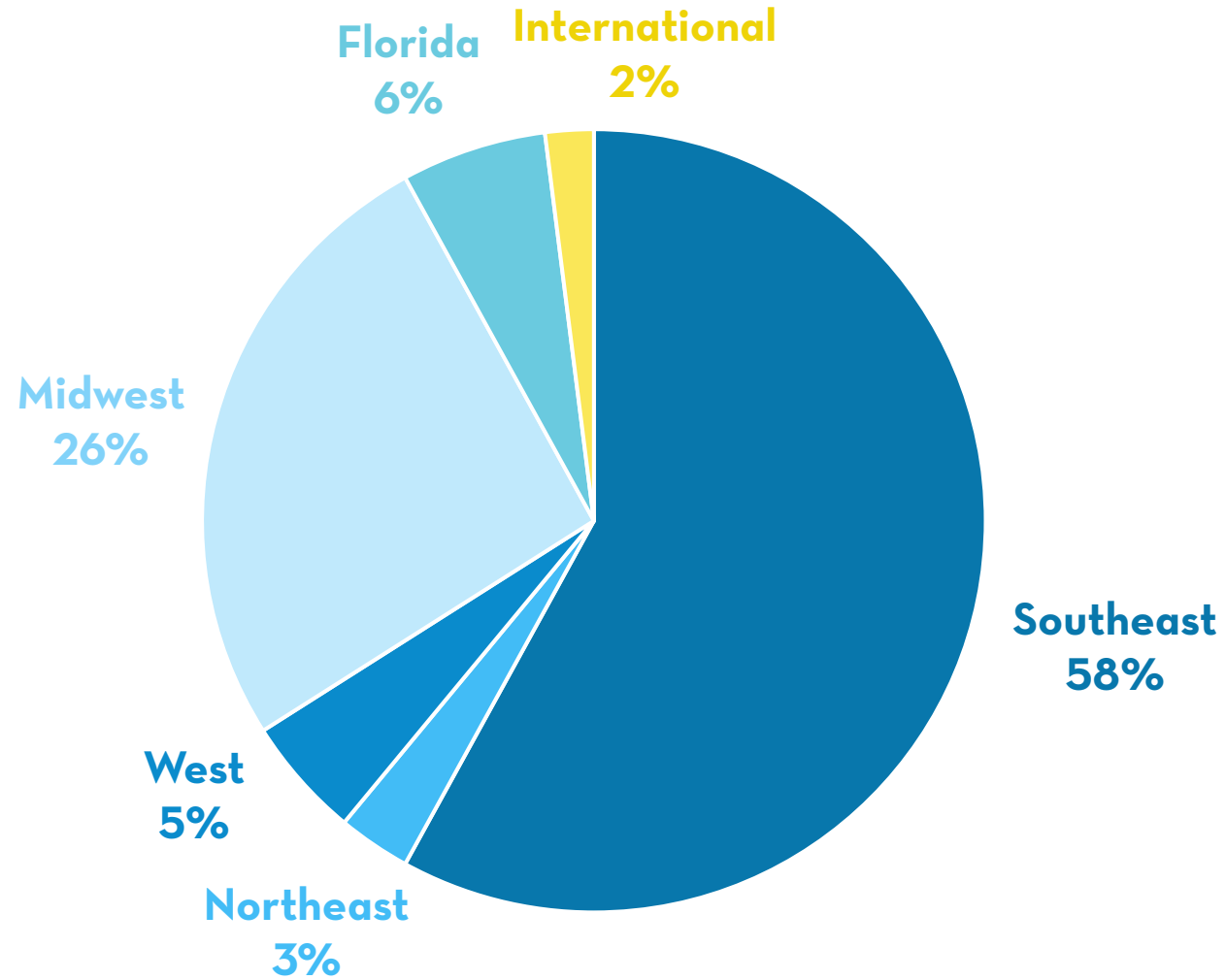
26% who **flew** used the following airports:



VISITOR JOURNEY: TRAVEL PARTY PROFILE

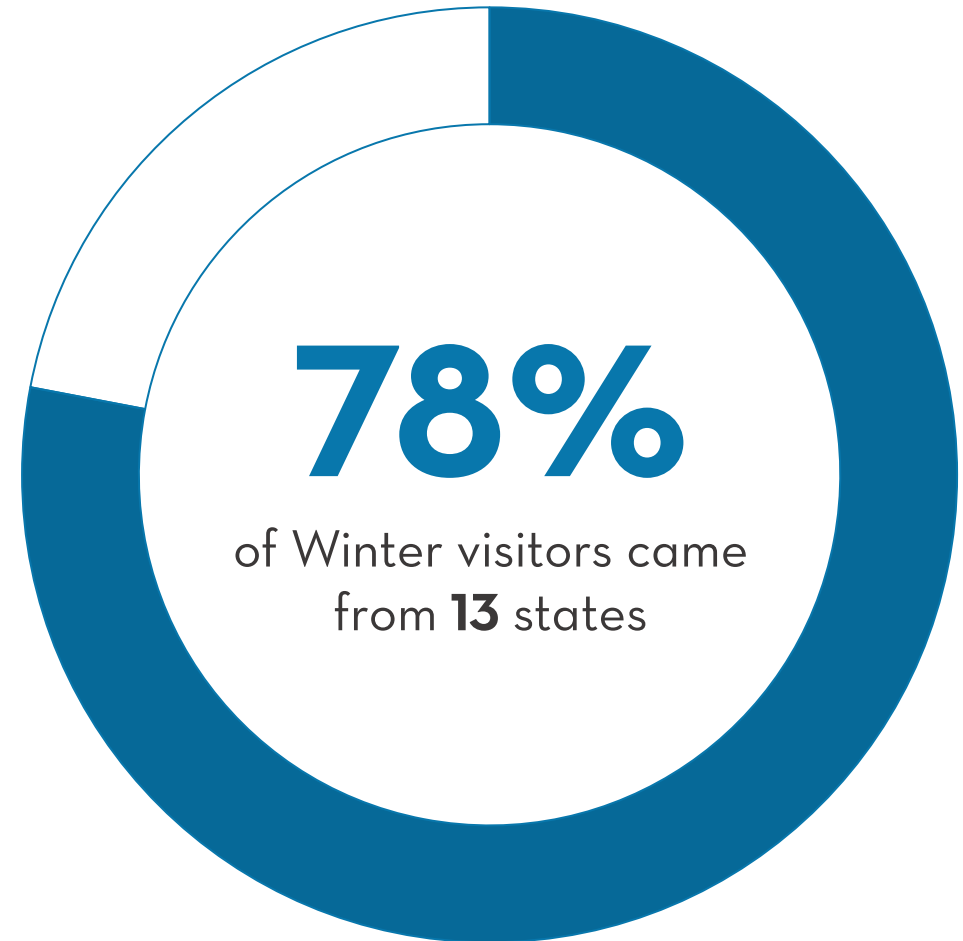


ORIGIN OF WINTER VISITORS



ORIGIN OF WINTER VISITORS

State	% of Visitors
Georgia	13%
Tennessee	11%
Texas	9%
Alabama	8%
Mississippi	7%
Florida	6%
Louisiana	5%
Ohio	4%
Minnesota	3%
Indiana	3%
Kentucky	3%
Missouri	3%
Illinois	3%



ORIGIN OF WINTER VISITORS

12% (-1% points from 2023) of all visitors came from the **Atlanta** market

7% (+0% points from 2023) visitors are from the **Nashville** market

Top Origin Markets	% of Visitors
Atlanta	12%
Nashville	7%
Dallas-Fort Worth	3%
Columbus, OH	3%
Birmingham	3%
Minneapolis-Saint Paul	3%
Chicago	3%
Mobile-Pensacola	3%
Houston	3%
New Orleans	3%
Saint Louis	2%
Indianapolis	2%
Knoxville	2%

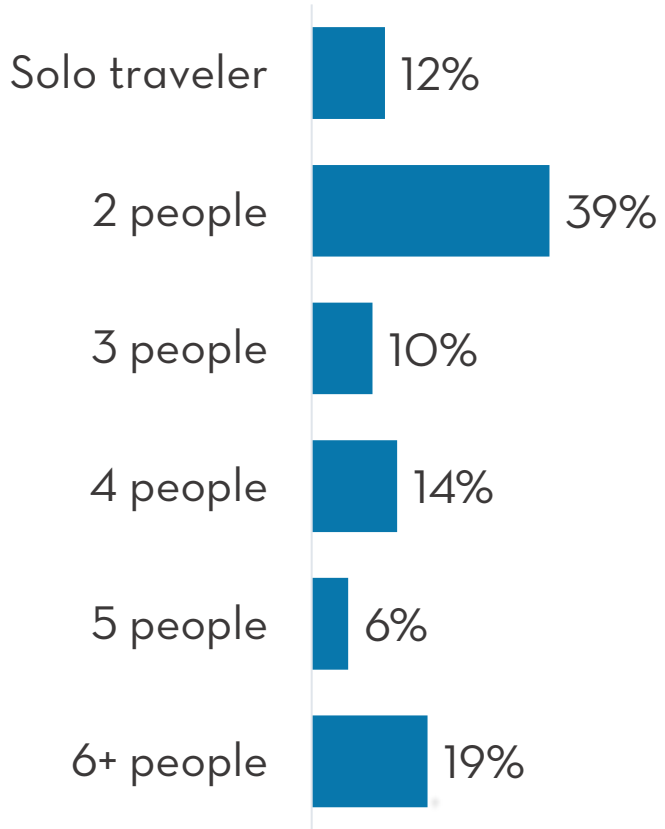
TRAVEL PARTY SIZE AND COMPOSITION



Visitors traveled in a party composed of **3.5** people (4.0 people in 2023)



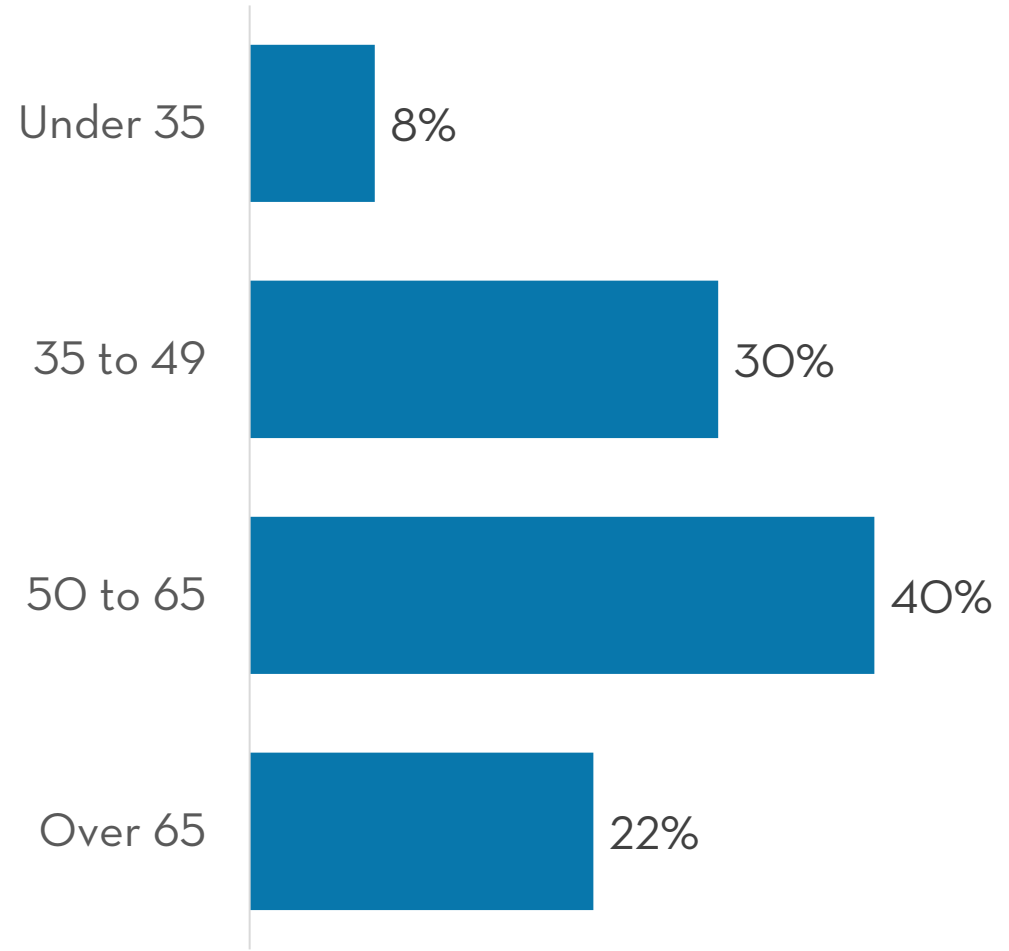
33% of visitors traveled with children under the age of 20



AGE OF WINTER VISITORS



Median age of Winter visitors was **55 years old** (54 years old in 2023)



TOTAL HOUSEHOLD INCOME IN 2023

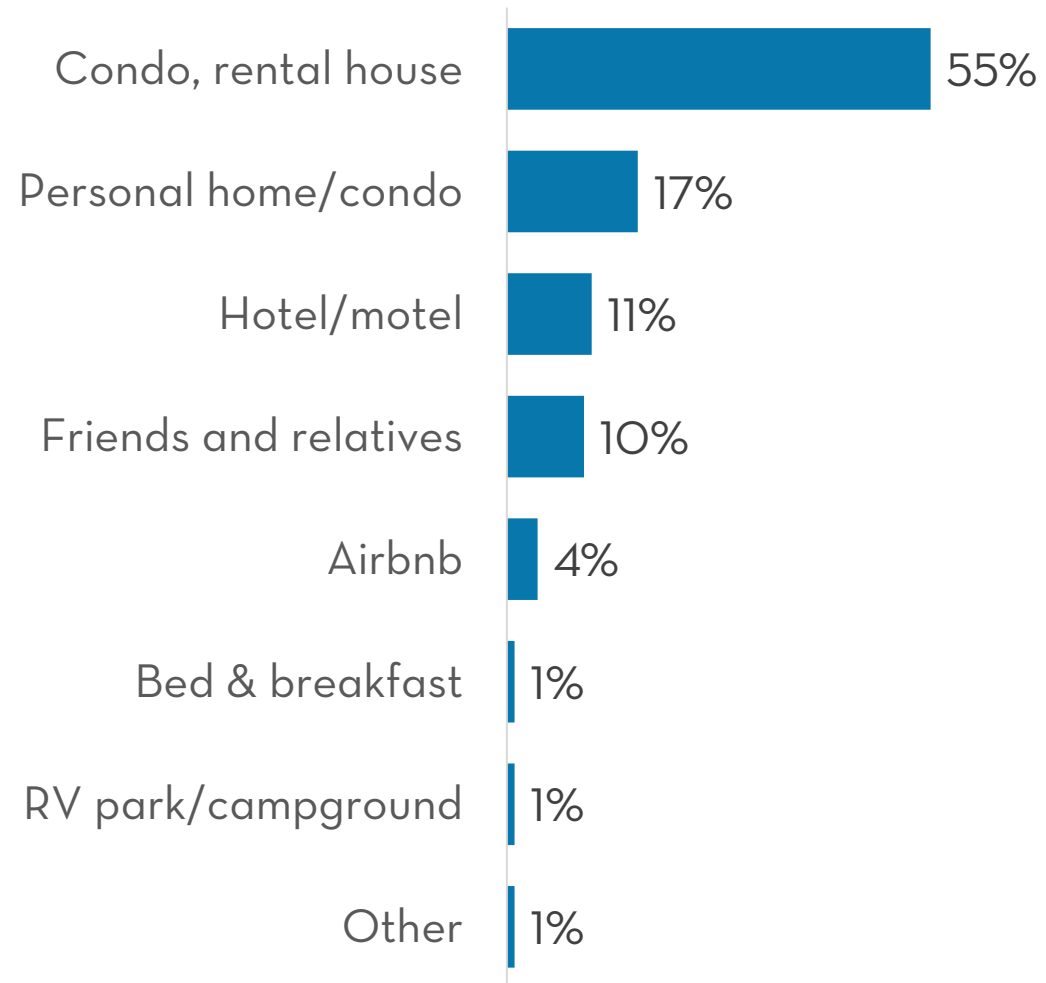
Winter visitors had a **median** household income of **\$147,400** (**\$150,000** in 2023), while estimated **average** household income was **\$186,000** (**\$191,800** in 2023)



VISITOR JOURNEY: TRIP EXPERIENCE



VISITOR ACCOMMODATIONS



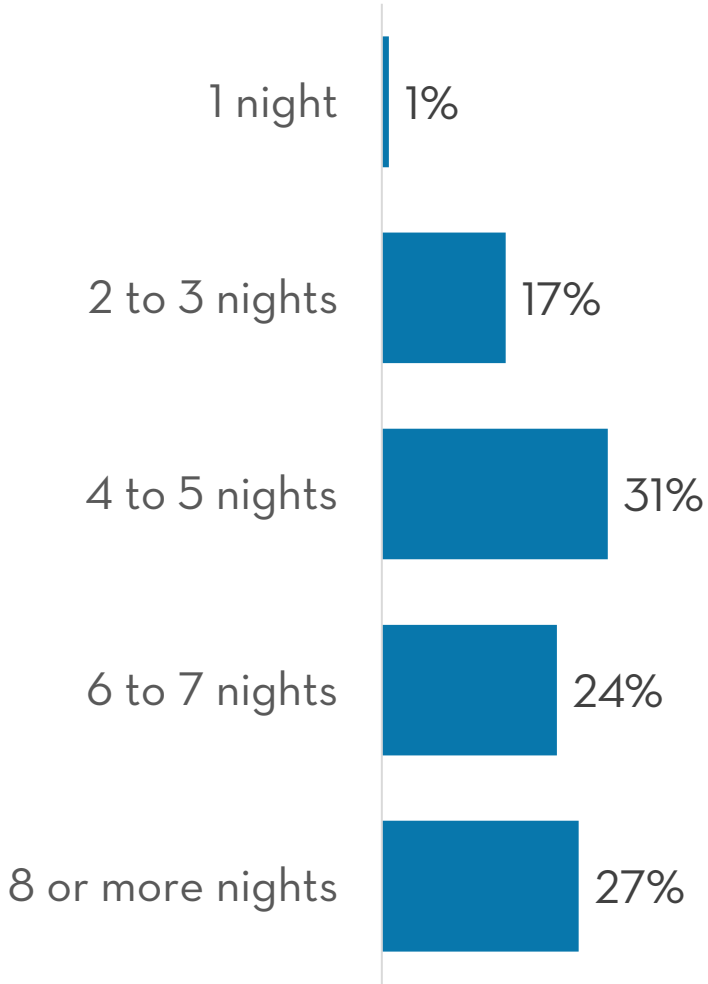
LENGTH OF STAY



Winter visitors¹ spent an average of **7.1** nights² in Walton County (7.3 nights in 2023)



Winter visitors staying in paid accommodations spent an average of **8.5** 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 Winter visitors were visiting for the first time

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

That was my first time

2 - 3

4 - 5

6 - 10

11 - 20

21+

14%

18%

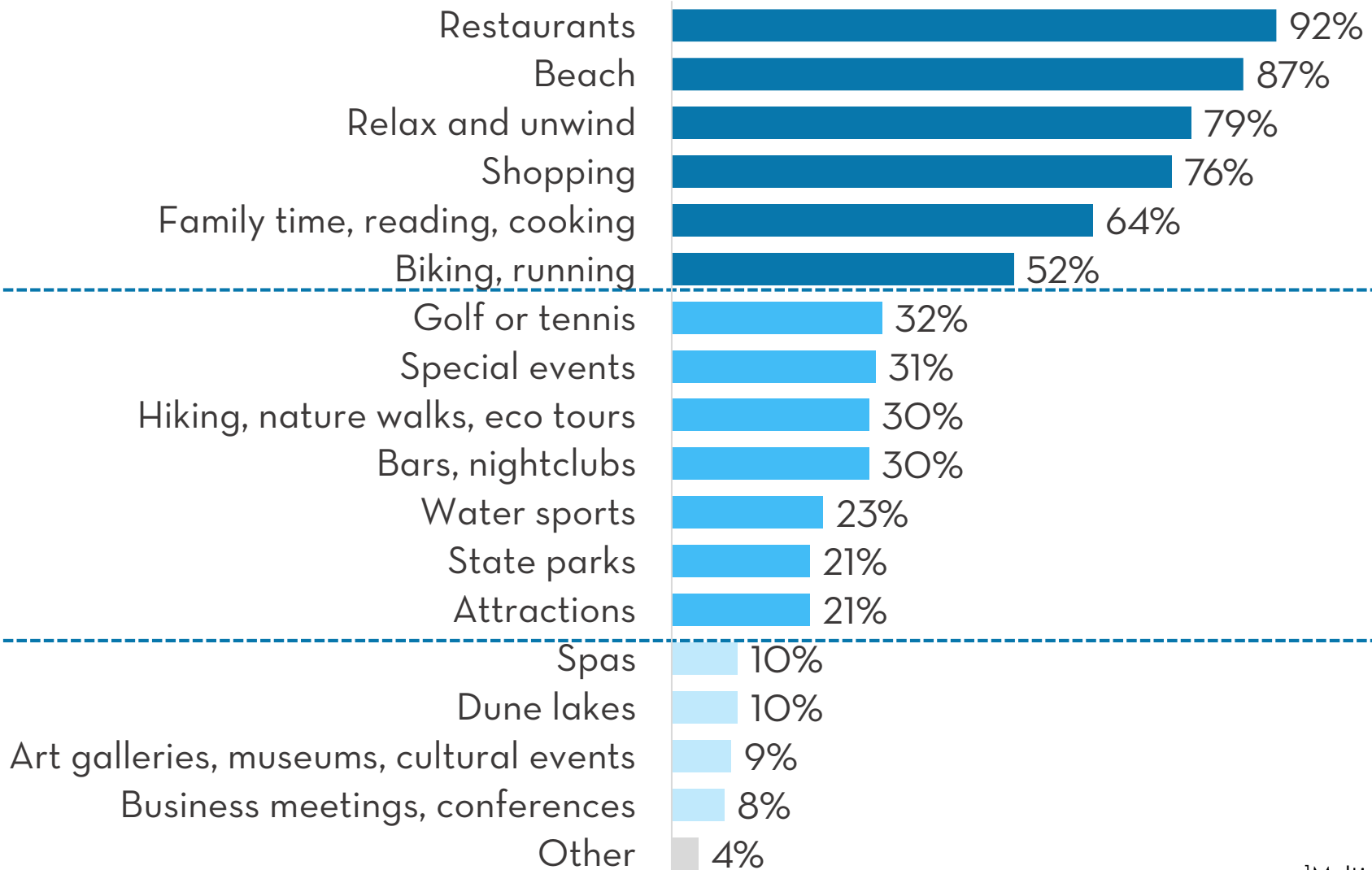
13%

17%

17%

21%

VISITOR ACTIVITIES¹

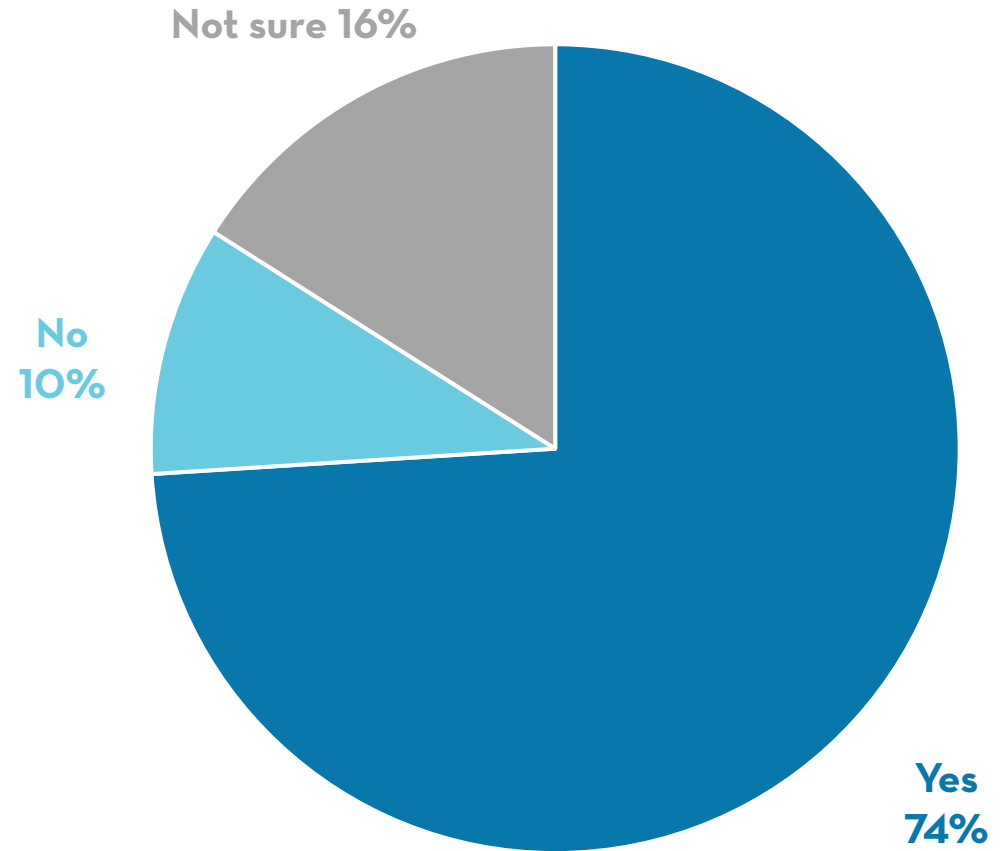


¹Multiple responses permitted.

BEACH SAFETY



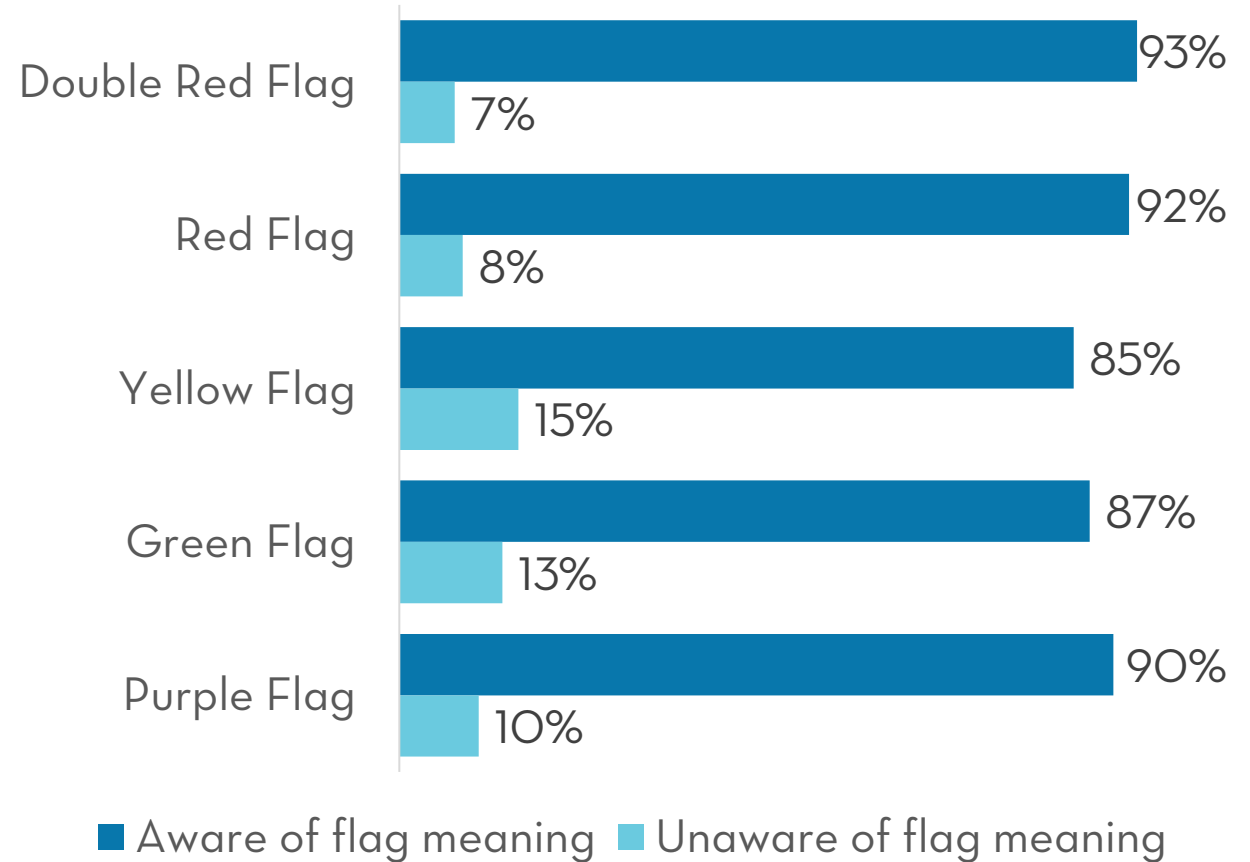
74% of Winter visitors know there are flags posted along the beaches to indicate how safe it is to go into the water



BEACH FLAG AWARENESS

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

63% (+2% points from 2023) of Winter 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

Visitor Metrics ¹	Average Daily Expenditure	Total Trip Expenditure
Accommodations	\$156	\$1,110
Restaurants	\$115	\$820
Groceries	\$63	\$450
Shopping	\$136	\$970
Entertainment	\$31	\$220
Transportation	\$38	\$270
Other	\$7	\$50
Total	\$546	\$3,890

¹Includes overnight visitors and day trippers.

VISITOR JOURNEY: POST-TRIP EVALUATION



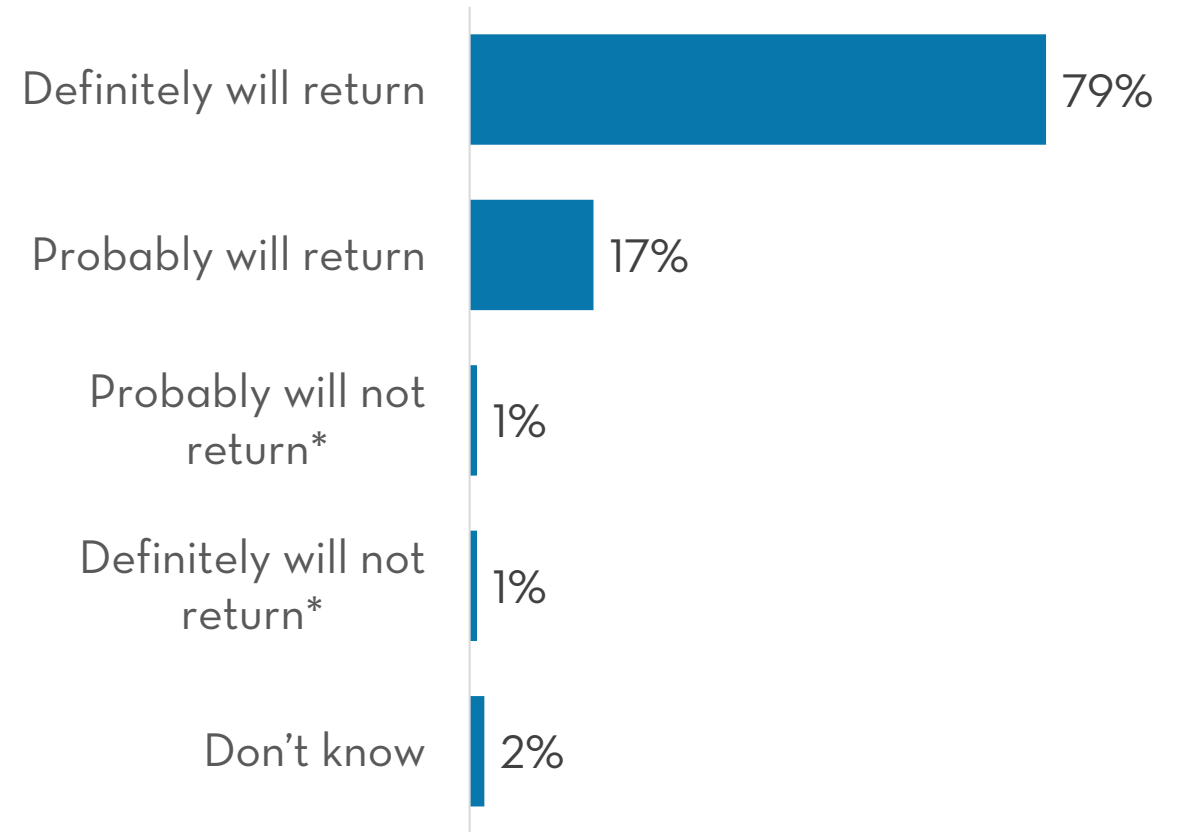
SATISFACTION WITH WALTON COUNTY



Visitors gave Walton County a rating¹ of **9.3** (+0.1 points from 2023) as a place to vacation



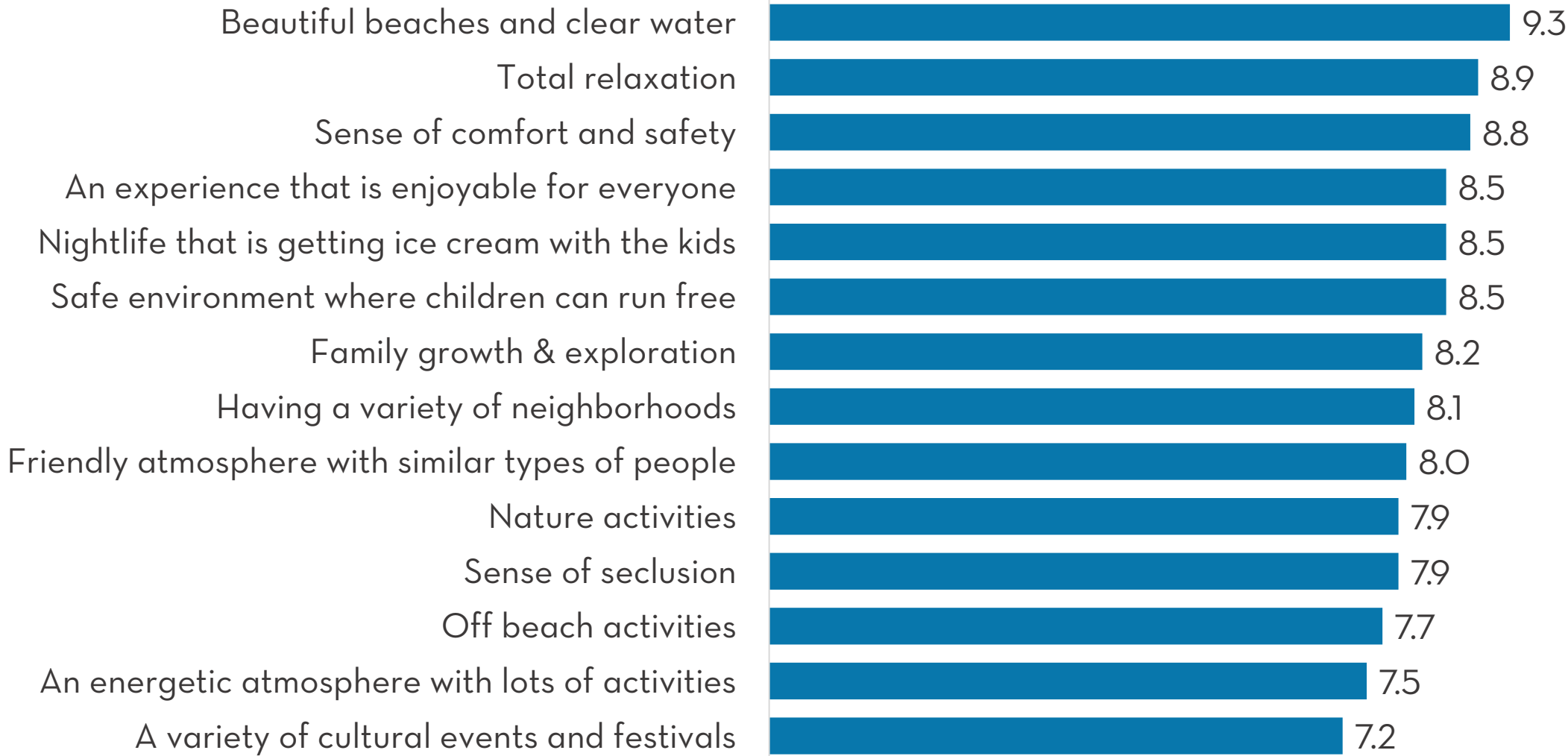
Nearly 4 in 5 Winter visitors will definitely return to Walton County



¹10 = Excellent; 1= Poor

*2% of all visitors will not return to Walton County for the following reasons:
1. Too expensive 2. Parking was a problem 3. Not enough to do during the day

RATING WALTON COUNTY¹



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

AREA DESCRIPTIONS



"An eclectic collection of walkable beach communities with good restaurants and shopping. Gorgeous beaches and water."

"Beautiful beaches and comfortable weather in the late winter and early spring. Cool Florida beach town vibes, safe walking and biking along roads and in parks and neighborhoods. A lot of parks and different restaurants."

"They have the most beautiful beaches! They have many great restaurants and lots of condo choices. It's nice to visit over the holidays because it's not as busy as some other times."

"Beautiful walking, architecture, and beaches"

"Beautiful powder sand beaches, beautiful homes, relaxation. Time to read a book."

"Beautiful beaches, emerald color waters, Lots of shopping, wonderful restaurants and good people."

AREA DESCRIPTIONS



"Beautiful, clean, friendly, safe."

"Where we stayed in Santa Rosa Beach, it was relaxing and luxurious. Private house with all we needed to either relax and do nothing or do family activities together."

"I would describe South Walton as the perfect place to take your family on a relaxing and beautiful beach trip. South Walton feels like visiting an out-of-country luxury destination while still being in the US."

"I have recommended it as a great family vacation destination."

"Sugar white beaches with crystal blue waters. Upscale, family-centric, very walkable, everything you need in one place."

"Upscale, safe, walkable place for families."

"I tell all my friends from Delaware to come to 30A. In the last year, four families have gone. We love it."

AREA DESCRIPTIONS



"Seaside is literally our favorite place to vacation."

"30A is a really neat stretch of varying, small, fantastic little villages along a near perfect, white sand beach with turquoise water, all with happy people, mostly from the South."

"Beautiful clean beaches, clear ocean water, great warm weather for February, amazing white sand and dunes, excellent restaurants and friendly people."

"My husband and I travel across the country & the world but feel you truly can't beat the quality of accommodations, dining options, and walkability to the most beautiful beaches. We choose to celebrate most of milestones & relaxation along 30A."

"South Walton is an American oasis with beautiful beaches - a destination for ultimate relaxation."

"Beautiful geography, upscale atmosphere and happenings."

FEELINGS ASSOCIATED WITH WALTON COUNTY



"Love all the restaurants with gorgeous views of the water and beautiful sunsets."

"Peaceful this time of year"

"Love the holiday lights and events."

"I love all of the memories I have here of spending time with my family, especially my grandparents."

"It's our favorite place to go."

"I really enjoy the Songwriter's festival. It makes me so happy."

"Magical."

WALTON COUNTY TOURISM

Winter 2024 Visitor Tracking Study

December 2023 - February 2024

Downs & St. Germain Research
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