

WALTON COUNTY TOURISM

Winter 2025 Visitor Tracking Study
December 2024 - February 2025



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Visitor Tracking Study

This report is based on 588 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 2024 and February 2025.

ECONOMIC IMPACT SUMMARY



TOURISM SNAPSHOT: KEY PERFORMANCE INDICATORS



494,400

TOTAL VISITORS

vs. 2024

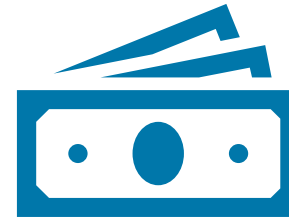
↓ 1.0%



602,100

ROOM NIGHTS

↓ 0.2%



\$545,617,900

DIRECT SPENDING

↓ 7.7%



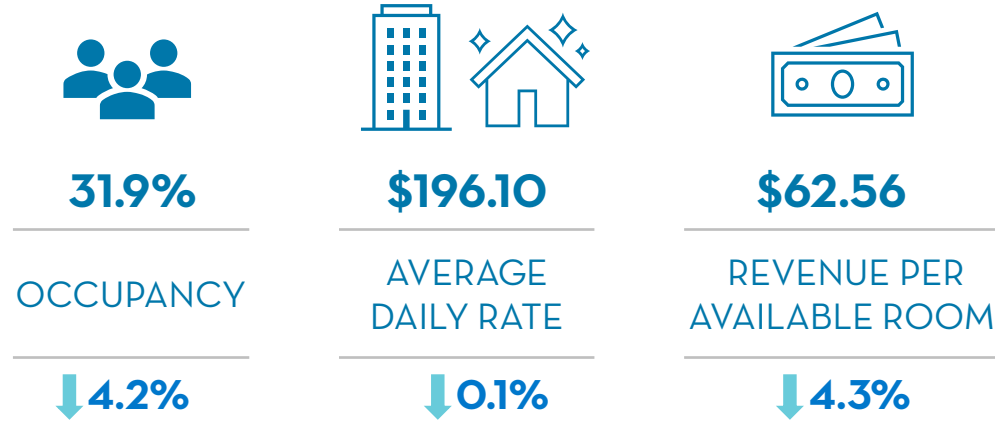
\$4,282,718

TOURISM DEVELOPMENT TAX

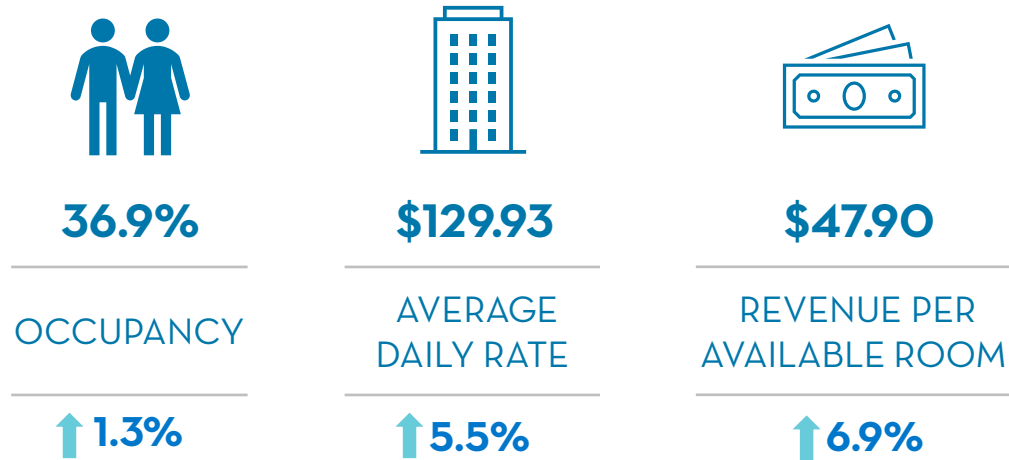
↓ 6.0%¹

TOURISM SNAPSHOT: LODGING METRICS

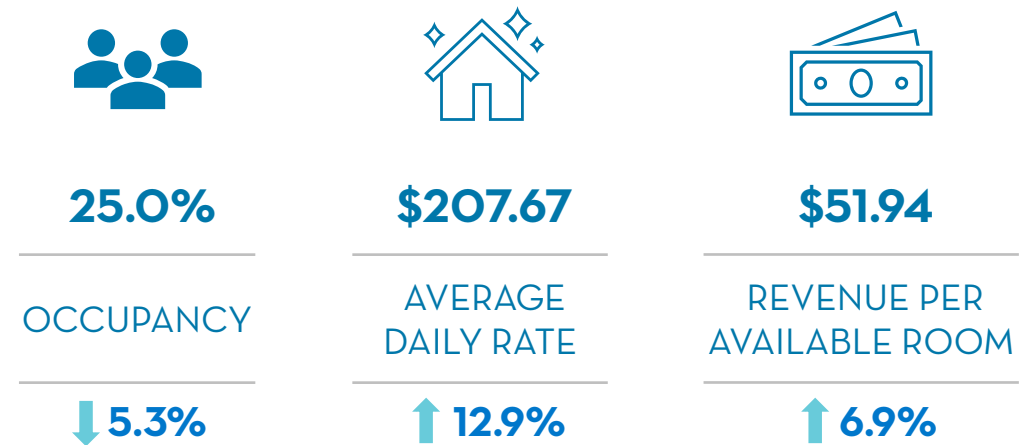
COMBINED



HOTELS¹



VACATION RENTALS²



vs. 2024

¹ Source: Smith Travel Research.

² Source: Key Data.

SPECIAL ATTRIBUTES OF THE WINTER SEASON

Insights:

- » Winter visitors consistently spend more per person than visitors during other seasons.
- » Winter travelers stay longer, are older, and have a lower median income than the typical Walton County visitor.
- » Winter is an under-leveraged, strategically valuable season

Recommendations:

- » Continue to focus marketing efforts on shoulder season
- » Market Winter as a premium experience for “smart” travelers due to lower room rates.
- » Position Winter as a “quiet luxury” season, emphasizing restorative getaways, fewer crowds, and “Winter wellness”.

Visitor Metrics	Typical Winter Visitor ¹	Typical Visitor ¹
Spend per visitor	\$1,291	\$916
Length of stay	7.2	5.9
Spend per visitor per day	\$180	\$156
Average Age	55	53
Median Income	\$140,000	\$156,300

¹ Using data from December 2021 to February 2025. Typical winter visitor is an average of Winter figures since Winter 2022. Typical visitor is an average of annual figures for 2022, 2023, and 2024.

VISITOR PROFILE SUMMARY



VISITOR PROFILE



56

Median Age

13%

First-time Visitor

\$126,300

Median Household Income

34%

Traveled with Children

3.5

Travel Party Size

7.4

Length of Stay

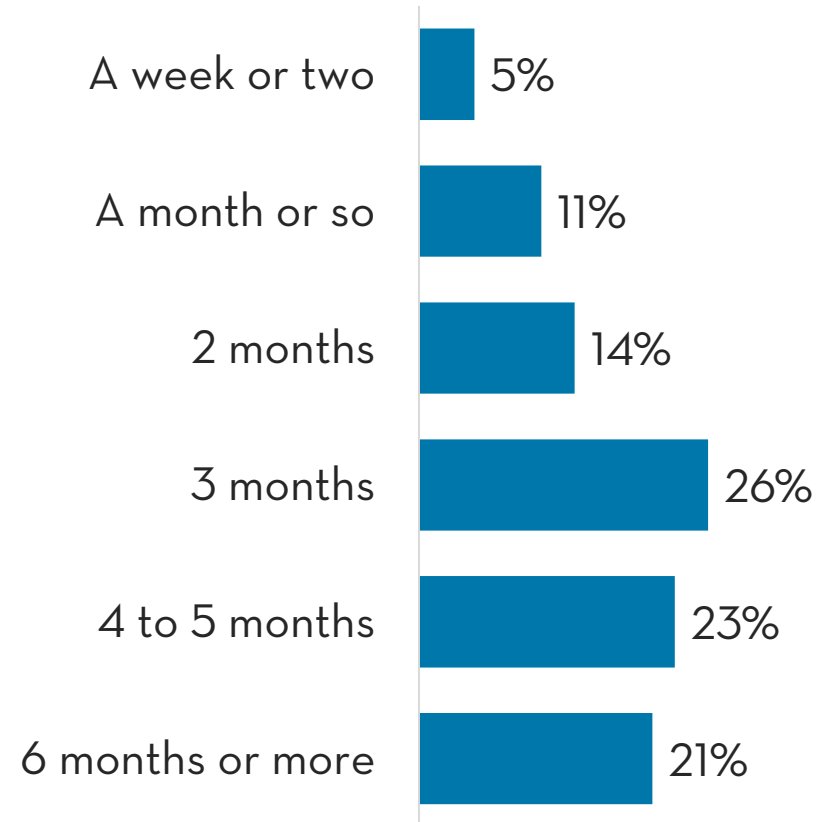
PLANNING CYCLE

Insights:

- » Average trip planning cycle begins **101 days** before the trip (*96 days in 2024*)
- » The typical booking window is increasing, giving accommodations more runway to manage pricing

Recommendations:

- » Encourage lodging partners to take advantage of this trend by offering rate stability and early booking promotions.
- » Continue to promote “book early” messages in advertising to continue supporting this shift in behavior.



WALTON COUNTY PROMOTIONS¹

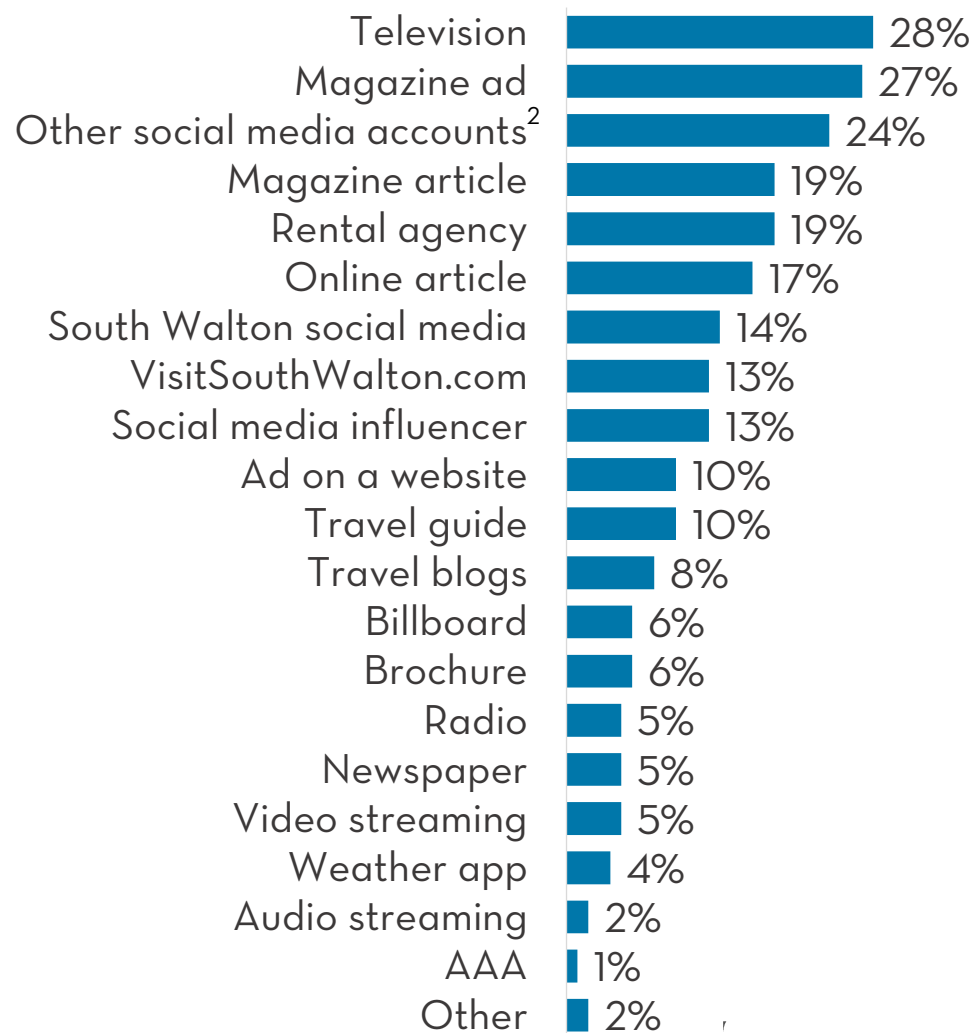
Insights:

- » More visitors recall seeing advertisements for Walton County on Television than through any other type of promotion. The number of visitors that saw promotions for South Walton on Television increased 7% points compared to Winter 2024.
- » Magazine and online article placements are also performing well in both *reach* and *influence*.

Recommendations:

- » Continue or expand TV ad campaigns, possibly testing additional creative formats, time slots, and placement to boost influence on travel decisions.
- » Maintain a strong presence in traditional media like television, magazines, brochures, radio, and newspapers which align with the Winter audience's demographics.
- » Highlight real visitor experiences through online editorial and lifestyle placements.

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



¹Multiple responses permitted.

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

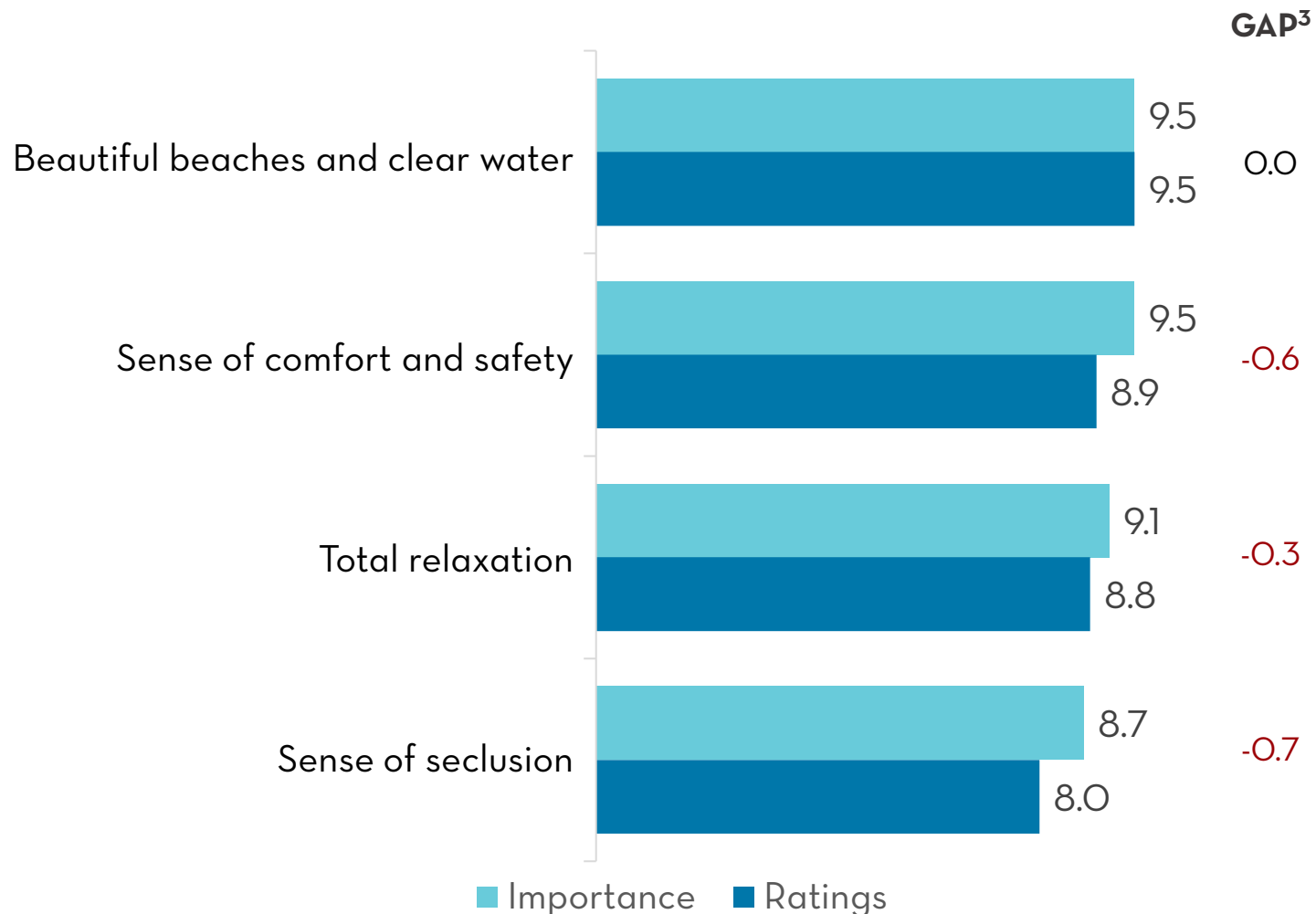
VACATION ATTRIBUTE IMPORTANCE¹ VS. RATINGS²

Insight:

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

Recommendations:

- » Winter is ideal for positioning Walton County as a premium, low-crowd escape with bundled wellness or cultural experiences.
- » Promote low-density neighborhoods and quiet accommodations in winter campaigns tapping into that desire for privacy and peace.



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 9.5 on its beaches. Hence, the GAP is 0.0.

VISITOR ACTIVITIES¹

Insight:

» Off-beach activities such as shopping, golf & tennis, hiking, nature walks, & eco-tours, bars & nightclubs, state parks, the dune lakes, and art galleries, museums, & cultural events consistently garner a higher percentage of visitors in Winter than other seasons.²

Recommendation:

» Promote off-beach activities in shoulder season marketing to take advantage of longer stays and higher spend per visitor.



¹Multiple responses permitted.

²Using data from December 2021 to February 2025

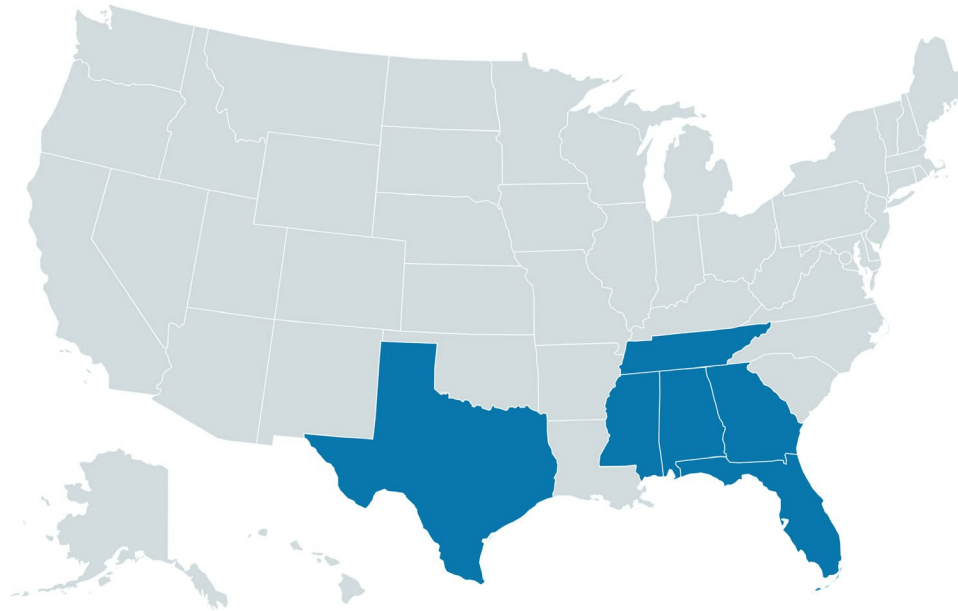
ORIGIN OF WINTER VISITORS

Insight:

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

Recommendation:

- » Continue targeted outreach in these regions with drive-focused messaging and familiar media channels.
- » Consider exclusive offers for returning visitors or loyalty perks tied to these markets.



54% of visitors are from 6 states

12% Georgia

11% Tennessee

9% Alabama

9% Mississippi

8% Texas

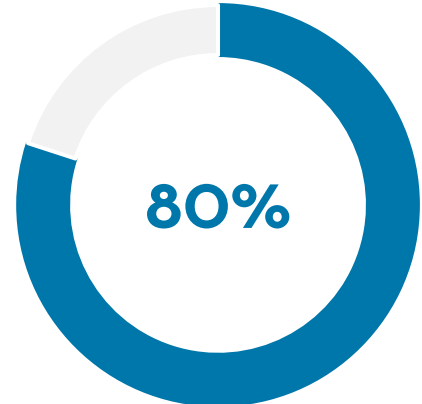
5% Florida

SATISFACTION STATISTICS



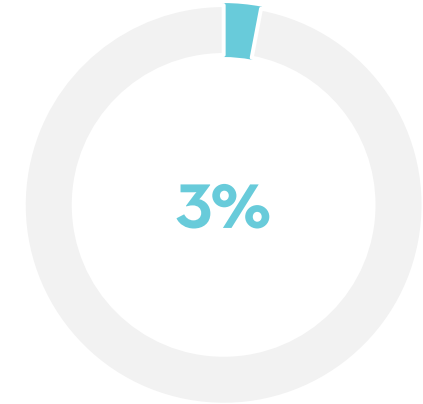
Highly Rated

Visitors gave Walton County a rating of 9.3 out of 10 (consistent with 2024) as a place to vacation



DEFINITELY RETURN

80% of visitors said they would definitely return to Walton County



UNCERTAIN ABOUT RETURNING¹

2% of visitors were uncertain of whether they would return or not

¹3% of visitors who are uncertain about returning to Walton County for the following reasons:
1. Too expensive 2. Not enough to do during the day 3. Not enough to do at night

VISITOR DESCRIPTIONS OF WALTON COUNTY

"A place where you can park your car for the whole week and walk everywhere you need to go. Quiet, safe, amazing food, wonderful shopping."



"Perfectly bougee, quiet, beautiful, quaint, and relaxing. Great accommodations. Friendly locals."

"Some of the best beaches & white sugar sand in the U.S. and much more convenient to visit than the Caribbean for quick getaways."



YEARLY COMPARISONS



VISITOR PROFILE - WINTER 2024 VS. 2025

Visitor Metrics	Winter 2024	Winter 2025
Travel party	3.5	3.5
Kids <20	33%	34%
Median age	55	56
Estimated median household income	\$147,400	\$126,300
Drove	74%	76%
Nights stayed¹	7.1	7.4
Direct expenditures (travel party for entire trip)	\$3,890	\$3,760
1st time visitor	14%	13%
Over 10 visits to Walton County	38%	36%

¹Visitors staying 30 days or fewer.

VISITOR PROFILE - WINTER 2024 VS. 2025

Top Origin States	Winter 2024	Winter 2025
Georgia	13%	12%
Tennessee	11%	11%
Alabama	8%	9%
Mississippi	7%	9%
Texas	9%	8%
Florida	6%	5%

Origins - Regions	Winter 2024	Winter 2025
Southeast	58%	58%
Midwest	26%	28%
Florida	6%	5%
West	5%	4%
Northeast	3%	3%
International	2%	2%

VISITOR PROFILE - WINTER 2024 VS. 2025

Top Visitor Activities	Winter 2024	Winter 2025
Restaurants	92%	92%
Beach	87%	86%
Relax and unwind	79%	82%
Shopping, antiquing	76%	78%
Family time, reading, cooking	64%	63%
Biking, running	52%	51%
Special events	31%	33%
Golf or tennis	32%	32%
Hiking, nature walks, eco tours	30%	31%
Bars, nightclubs	30%	27%
Water sports	23%	27%
Attractions	21%	23%
State parks	21%	21%
Spas	10%	12%
Art galleries, museums, cultural events	9%	11%
Dune lakes	10%	10%
Business meetings, conferences	8%	7%
Other	4%	2%

VISITOR PROFILE - WINTER 2024 VS. 2025

Visitor Metrics	Winter 2024	Winter 2025
Will return to Walton County¹	96%	97%
Rating for overall experience²	9.3	9.3
Viewed Visitors Guide³	21%	25%
Planned trip 6+ months out	21%	21%
Used VisitSouthWalton.com	12%	11%
Used 1 of 16 beaches' websites	13%	15%
Use the term "South Walton"	14%	11%

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

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

³ 21% used the online version & 4% 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 - WINTER 2024 VS. 2025

- » Lodging metrics including the number of visitors and room nights are down compared to Winter 2024 as the market continues to normalize following pandemic peaks. The number of visitors is still up over 25% from pre-pandemic visitation.
- » Direct spending and economic impact of tourism were down year over year due to a decrease in the numbers of visitors and travel party spending.
- » A decrease in occupancy and slight decrease in ADR led to a decrease in RevPAR compared to Winter 2024. The decrease in occupancy is partially due to an increase in the number of units available.
- » TDT collections decreased 6.0% in 2025 compared to 2024.²
- » With nearly half a million visitors this Winter, total visitor spending was over \$500 million.

Visitor Metrics	Winter 2024	Winter 2025	% Δ
Room nights	603,300	602,100	-0.2%
Total visitors	499,300	494,400	-1.0%
TDT collections	\$4,558,394	\$4,282,718	-6.0% ²
Direct spending	\$591,076,600	\$545,617,900	-7.7%
Economic impact¹	\$862,971,800	\$823,883,000	-4.5%
Occupancy	33.3%	31.9%	-4.2%
Room rates	\$196.38	\$196.10	-0.1%
RevPAR	\$65.39	\$62.56	-4.3%

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

¹ The economic impact multiplier for Walton County in 2025 is 1.51. In 2024 it was 1.46.

² The difference in year-over-year TDT collections is partially due to the transition to a new tax portal.

LODGING METRICS

31.9%

Occupancy

↓ 4.2%

\$196.10

ADR

↓ 0.1%

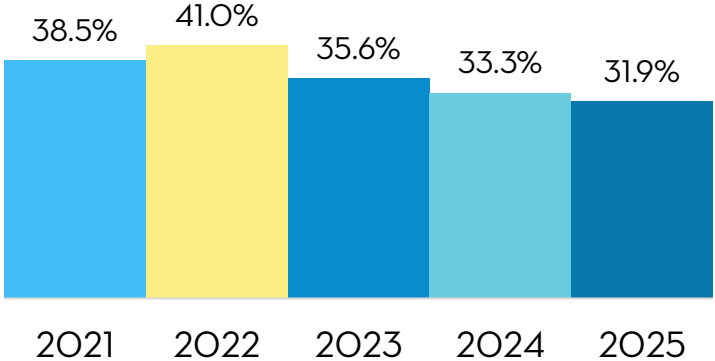
\$62.56

RevPAR

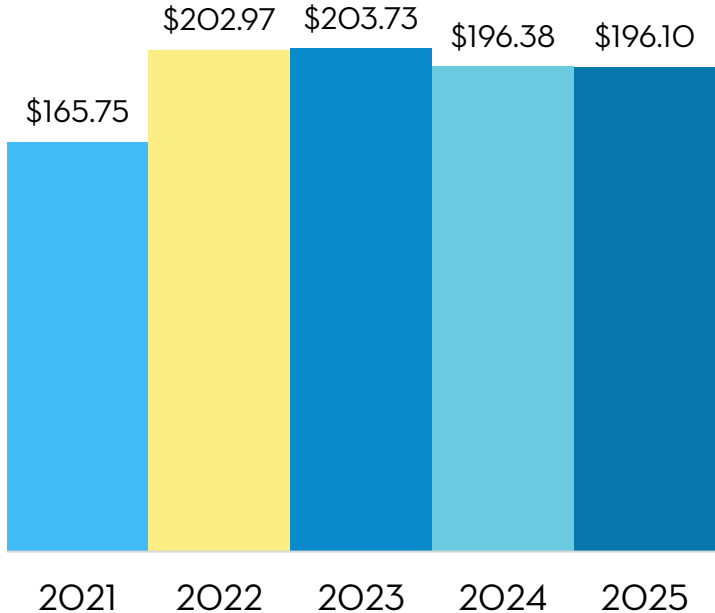
↓ 4.3%

5-YEAR OVERVIEW - WINTER LODGING METRICS

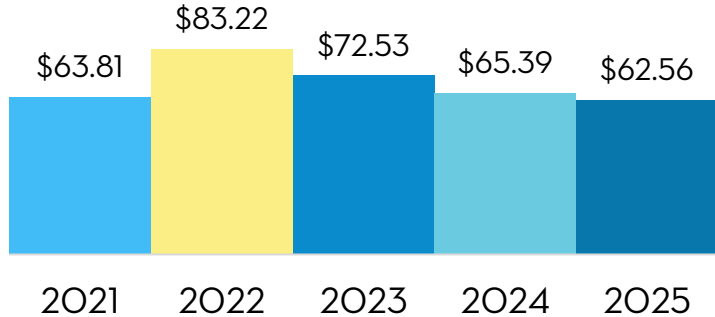
Occupancy Rate



Average Daily Rate

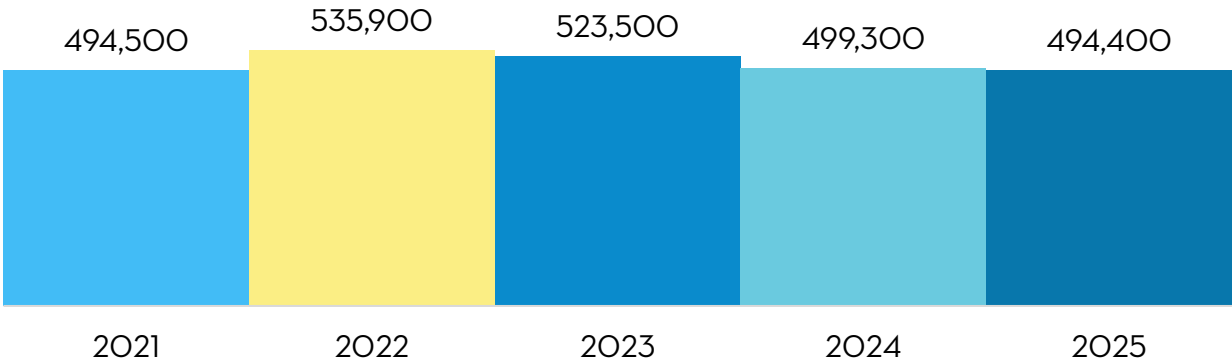


Revenue per Available Room

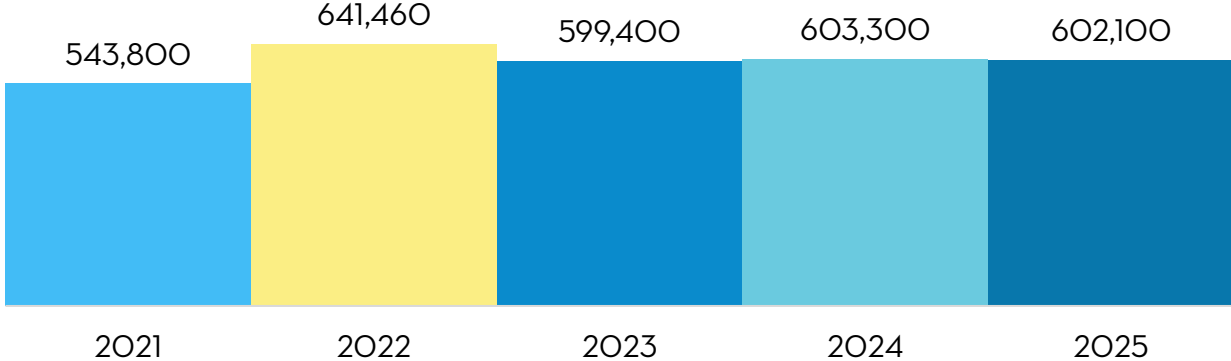


5-YEAR OVERVIEW - WINTER TOURISM METRICS

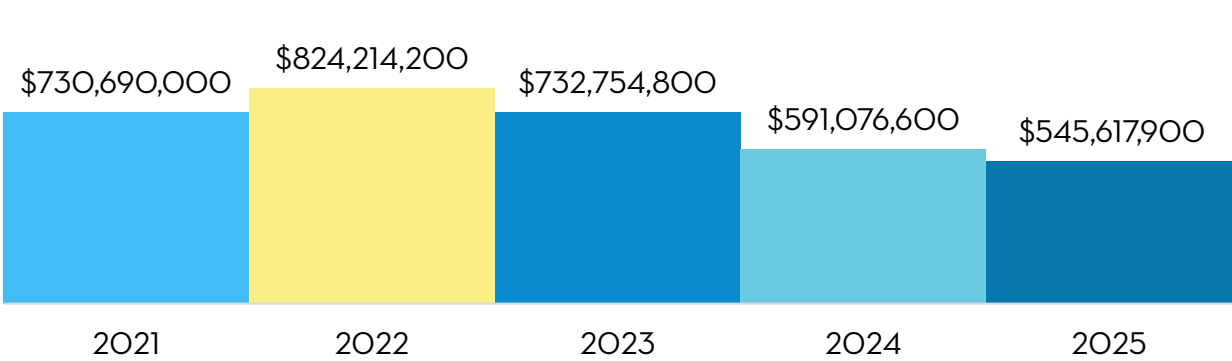
Visitors



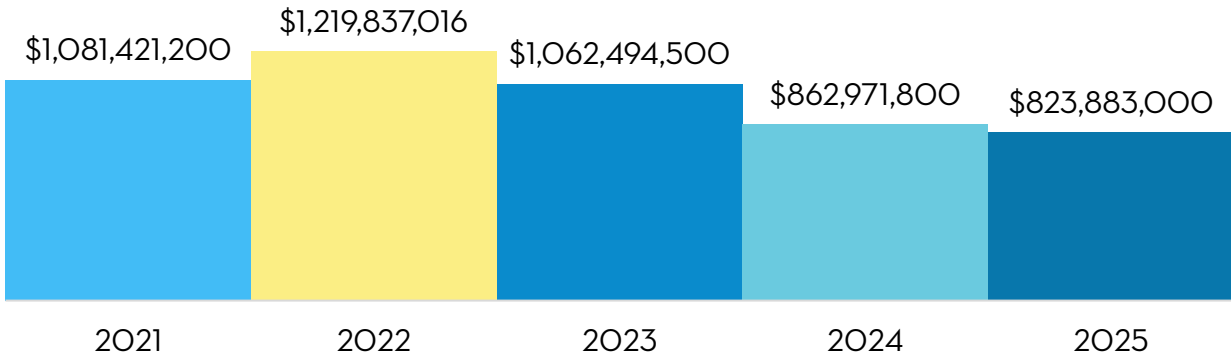
Room Nights



Direct Spending



Economic Impact



VISITOR JOURNEY: PRE-VISIT



PLANNING CYCLE



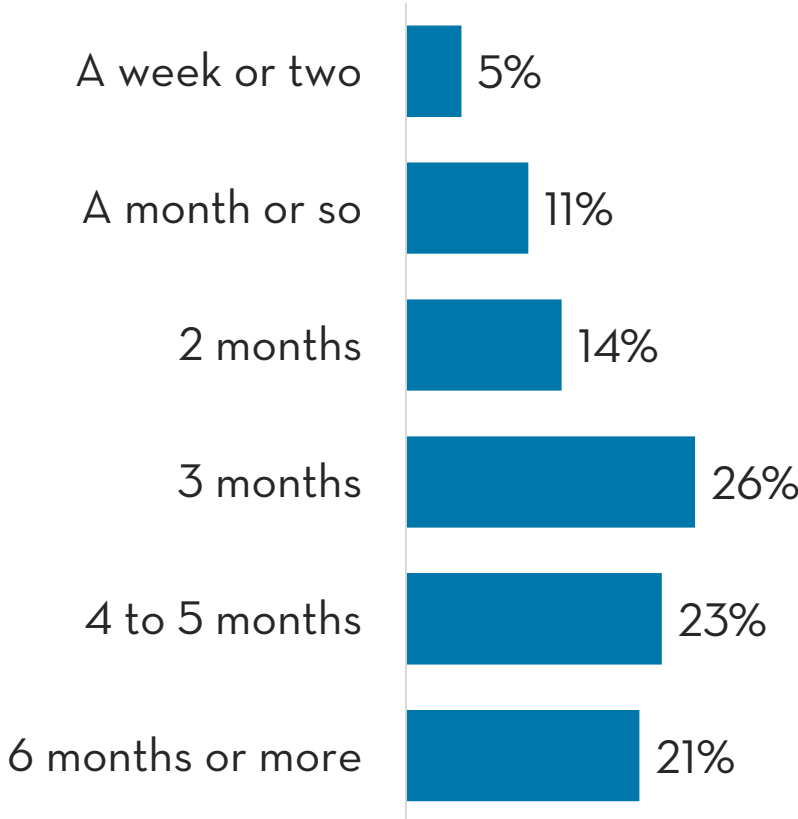
7 in 10 visitors plan a Walton County Winter vacation at least **3 months** in advance



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



Average trip planning cycle begins **101 days** before the trip (96 days in 2024)



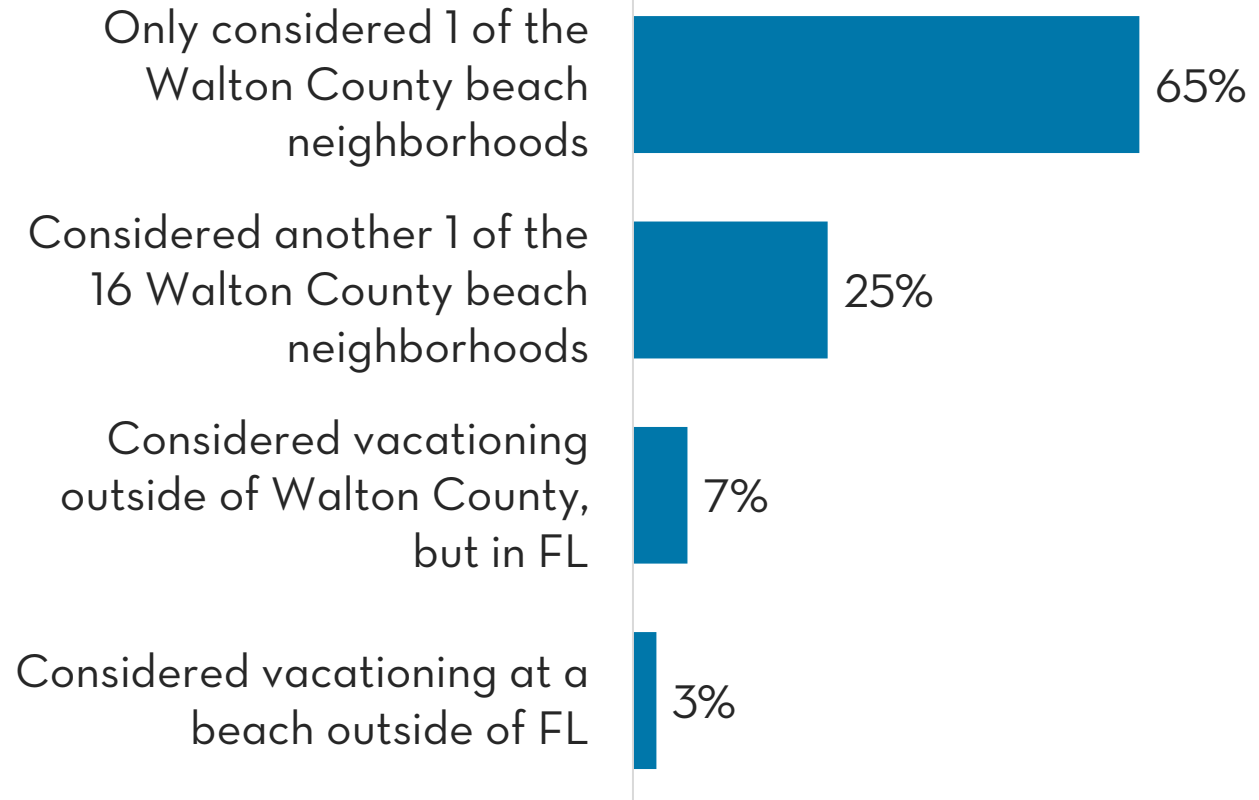
OTHER DESTINATIONS CONSIDERED



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



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

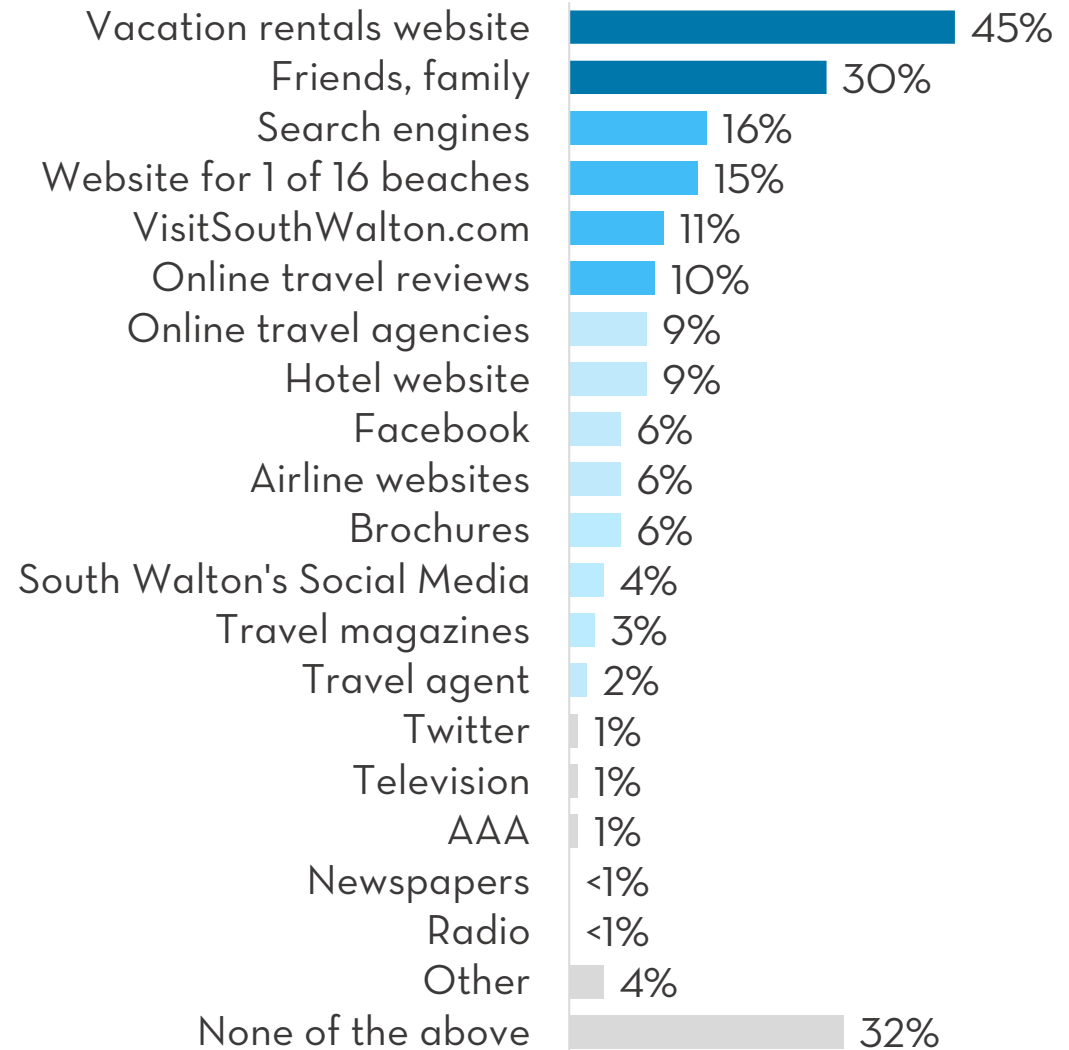


TRIP PLANNING SOURCES¹

Nearly 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

Over 1 in 10 visitors use VisitSouthWalton.com to help plan their trip to Walton County



¹Multiple responses permitted.

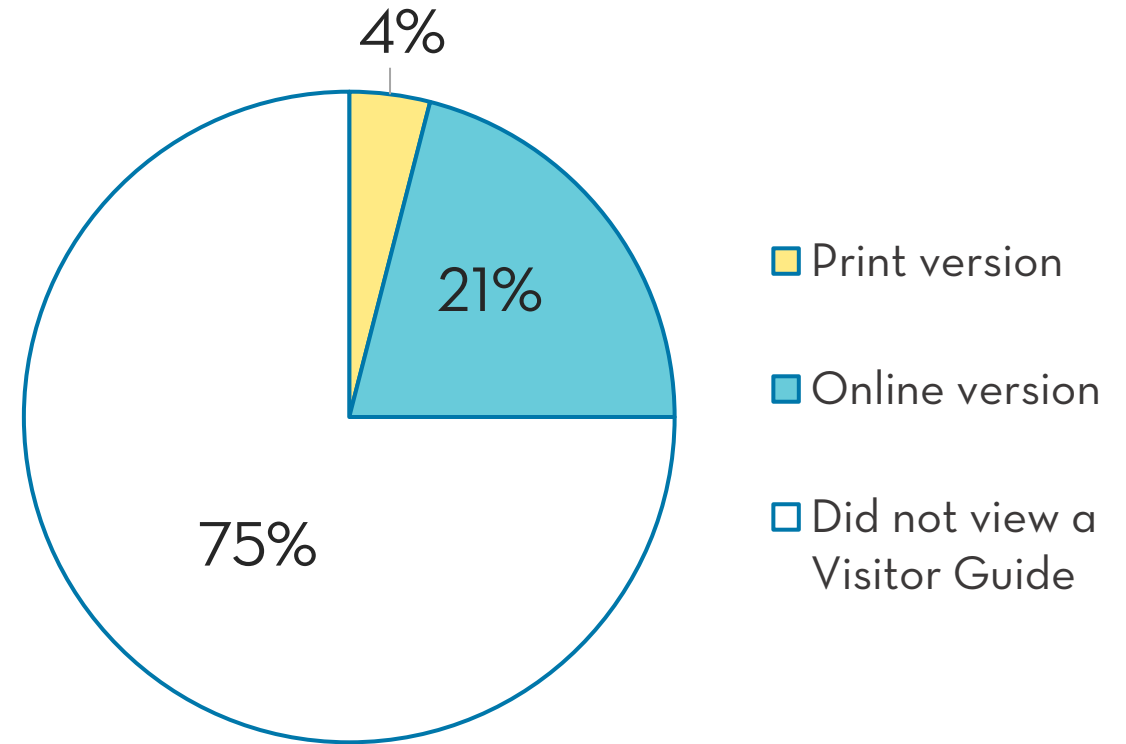
WALTON COUNTY VISITOR GUIDE



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

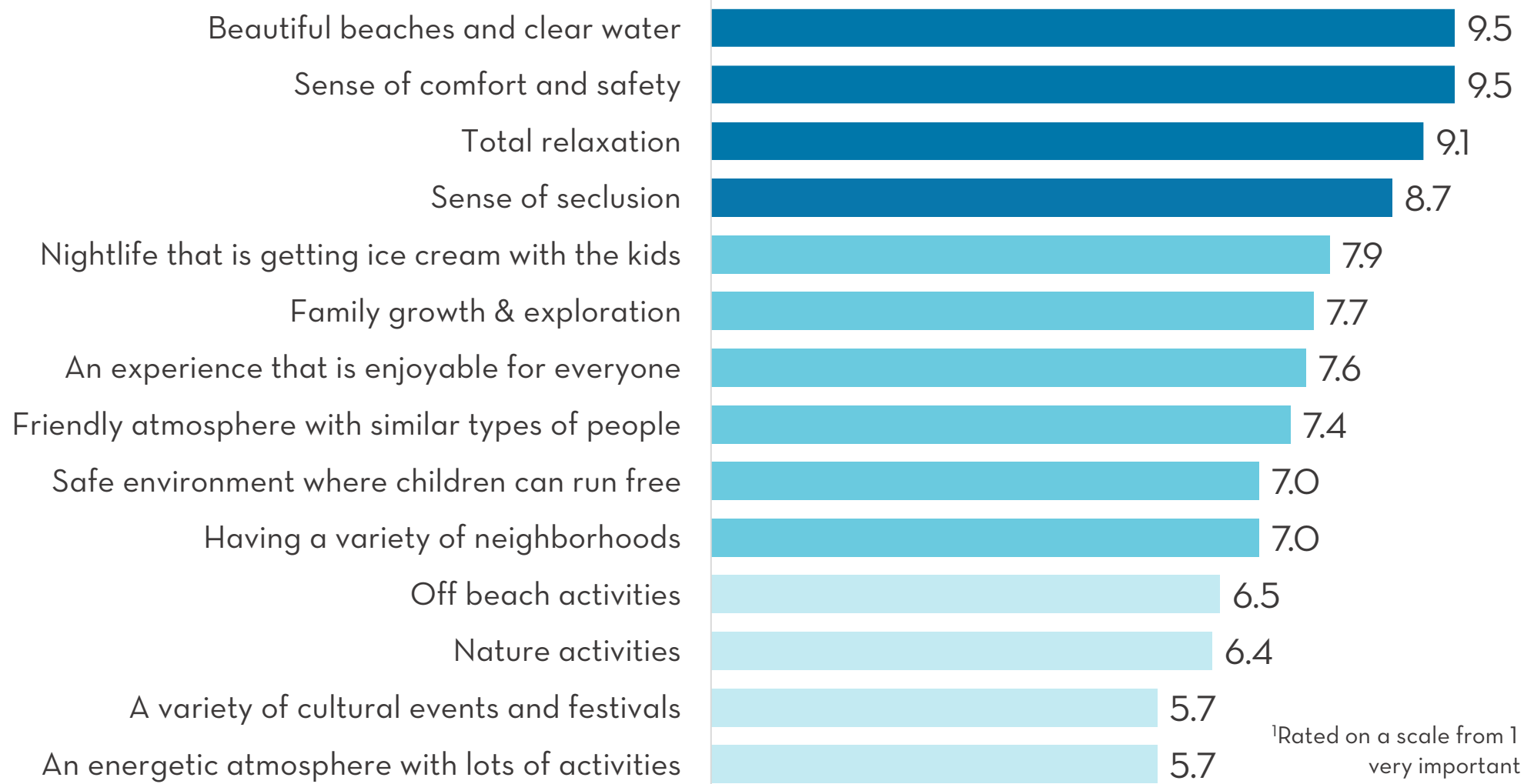


Winter visitors give the Visitor Guide a rating of **8.9 out of 10¹** (+0.2 points from 2024)



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.

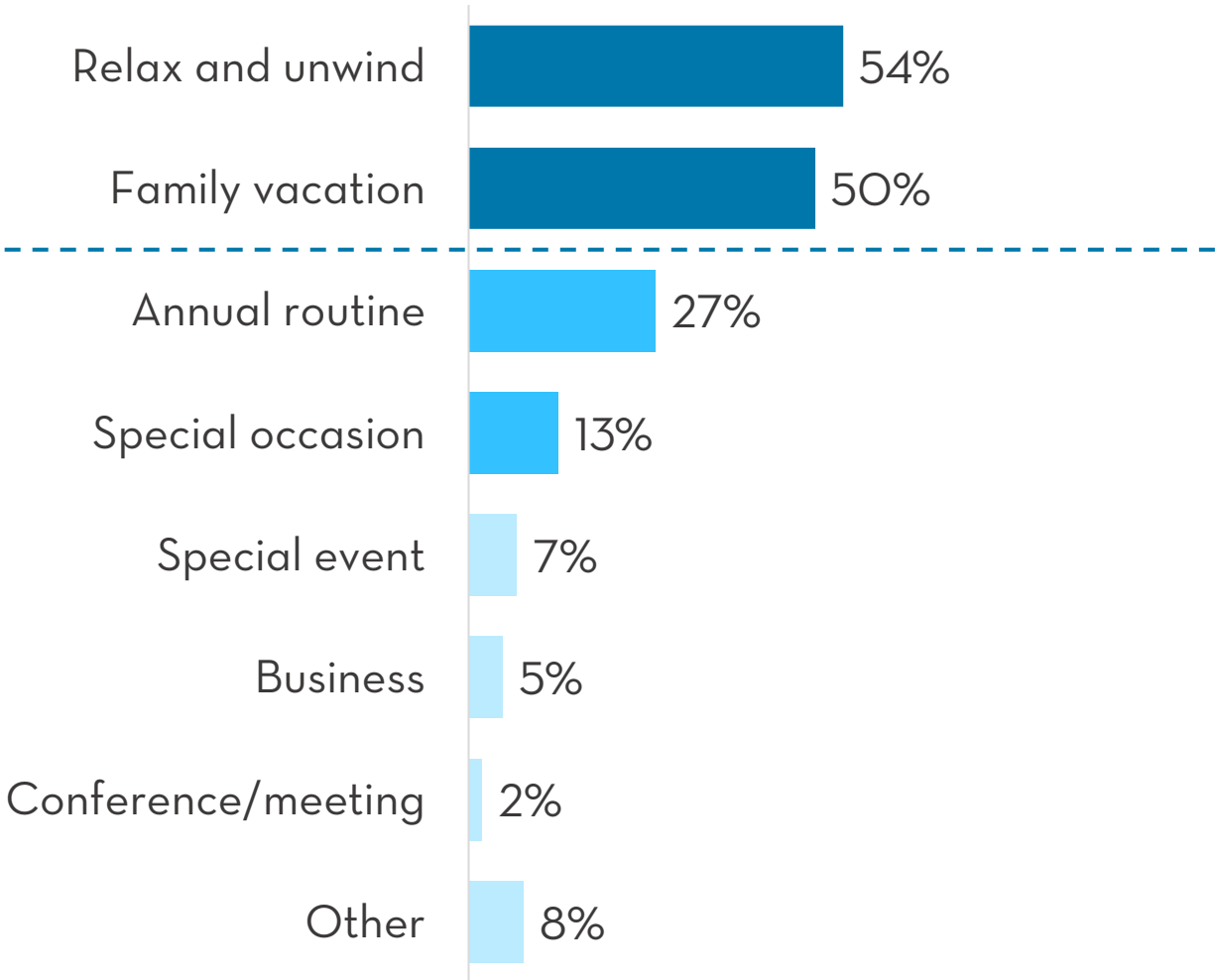
REASONS FOR VISITING¹



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



Half of Winter visitors come to **family vacation**



¹Multiple responses permitted.

WALTON COUNTY PROMOTIONS¹



25% (+1% points from 2024) of Winter visitors recall advertising, promotions, or travel stories for Walton County

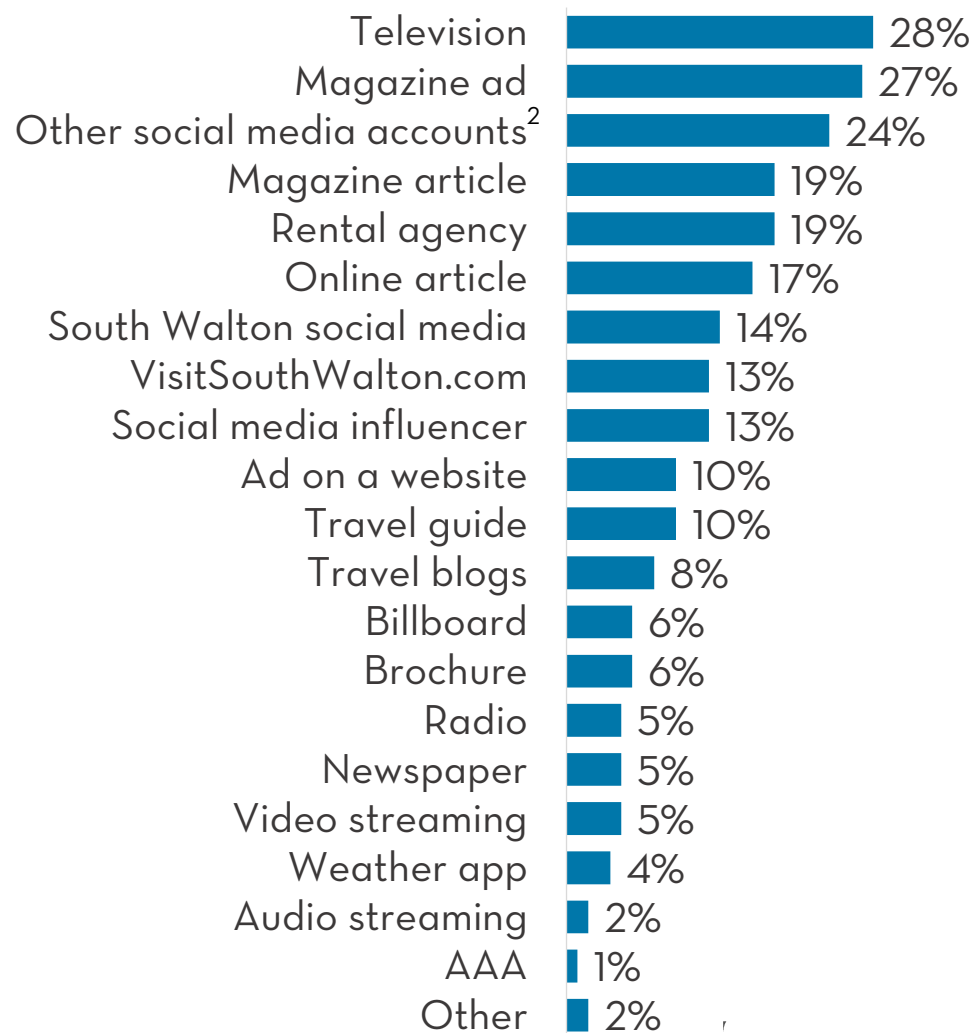


This information influences **8%** (+1% points from 2024) of all visitors to visit Walton County



28% (+7% points from 2024) Winter visitors recall information about the destination on **Television**

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



¹Multiple responses permitted.

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

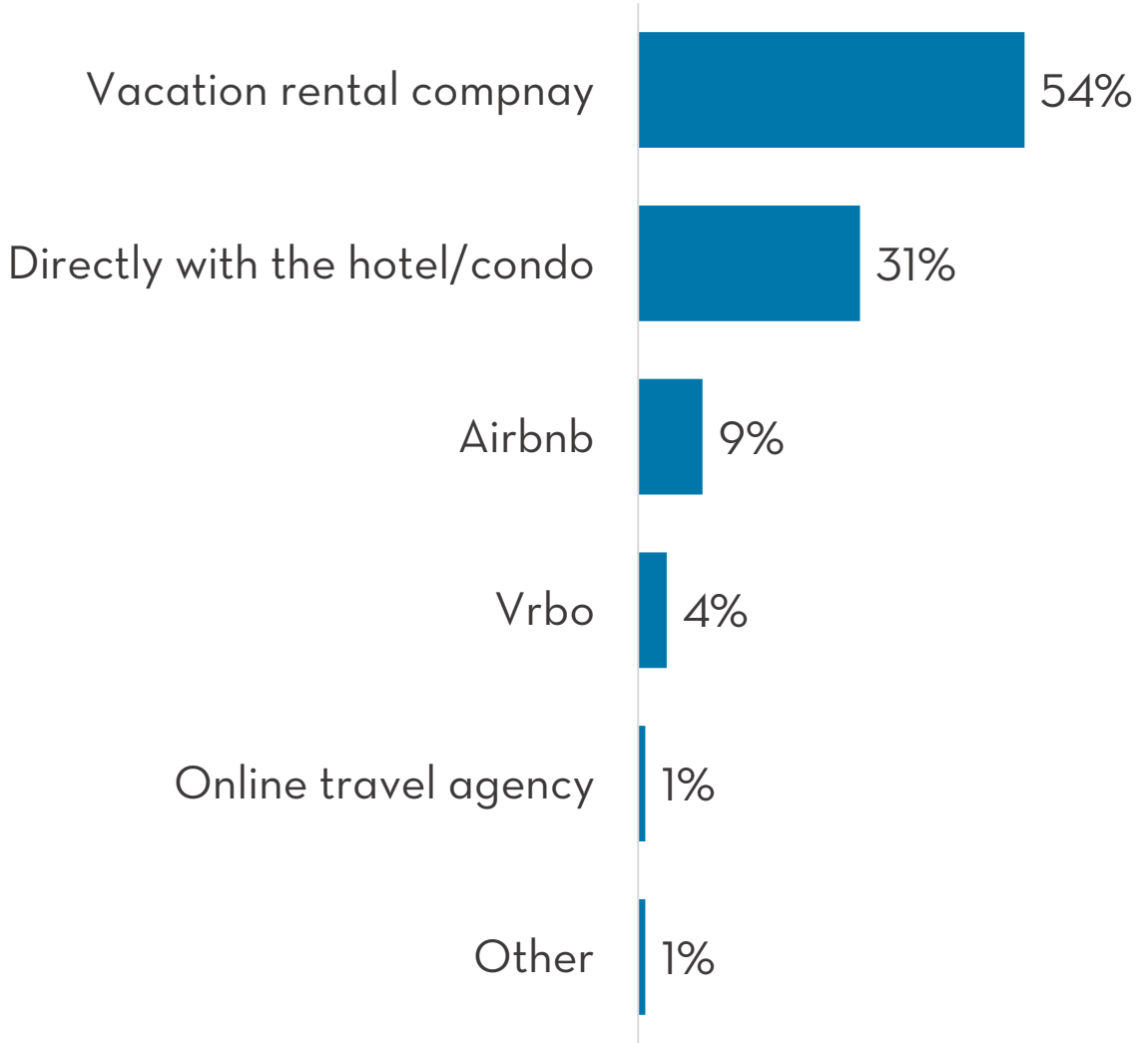
BOOKING ACCOMMODATIONS



Over half of visitors book accommodations through a **vacation rental company**



Nearly 1 in 3 Winter visitors book **directly with a hotel or condo**



VISITOR TRANSPORTATION

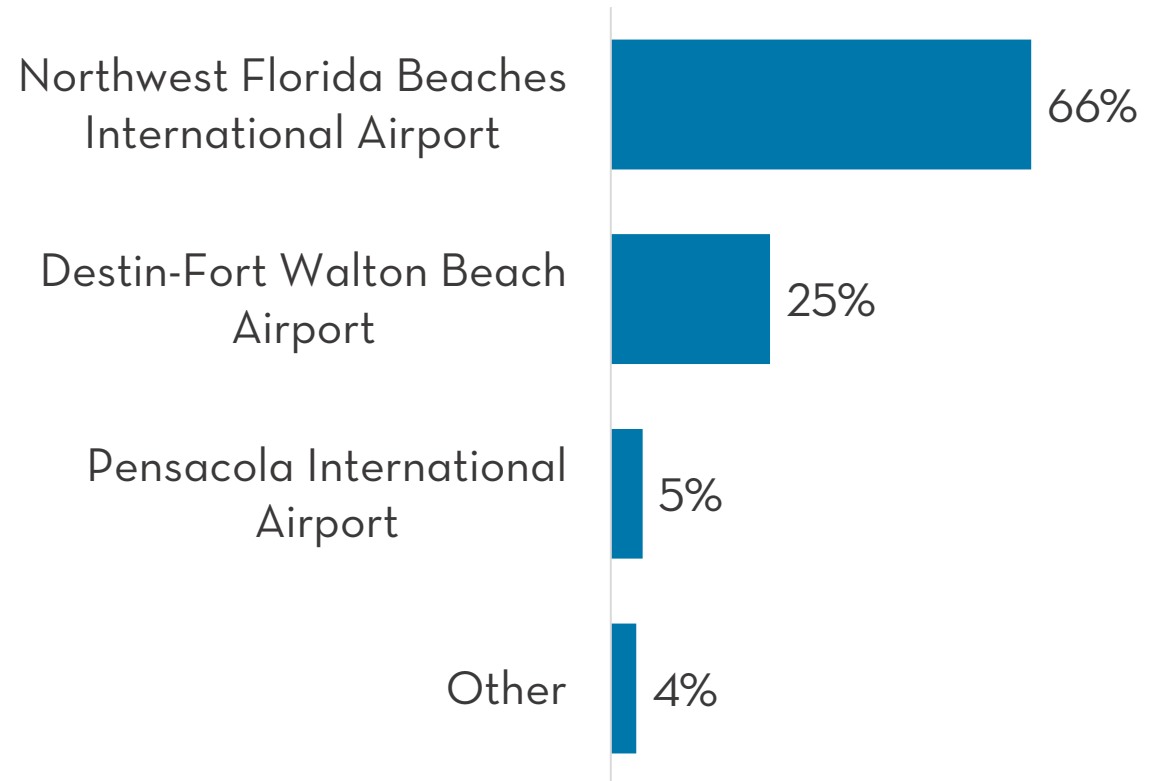


76% (+2% points from 2024) of Winter visitors drive to Walton County



24% (-1% points from 2024) of those who drive are aware that there are direct flights from their city to the Walton County area, and **17%** are not sure if there are direct flights available

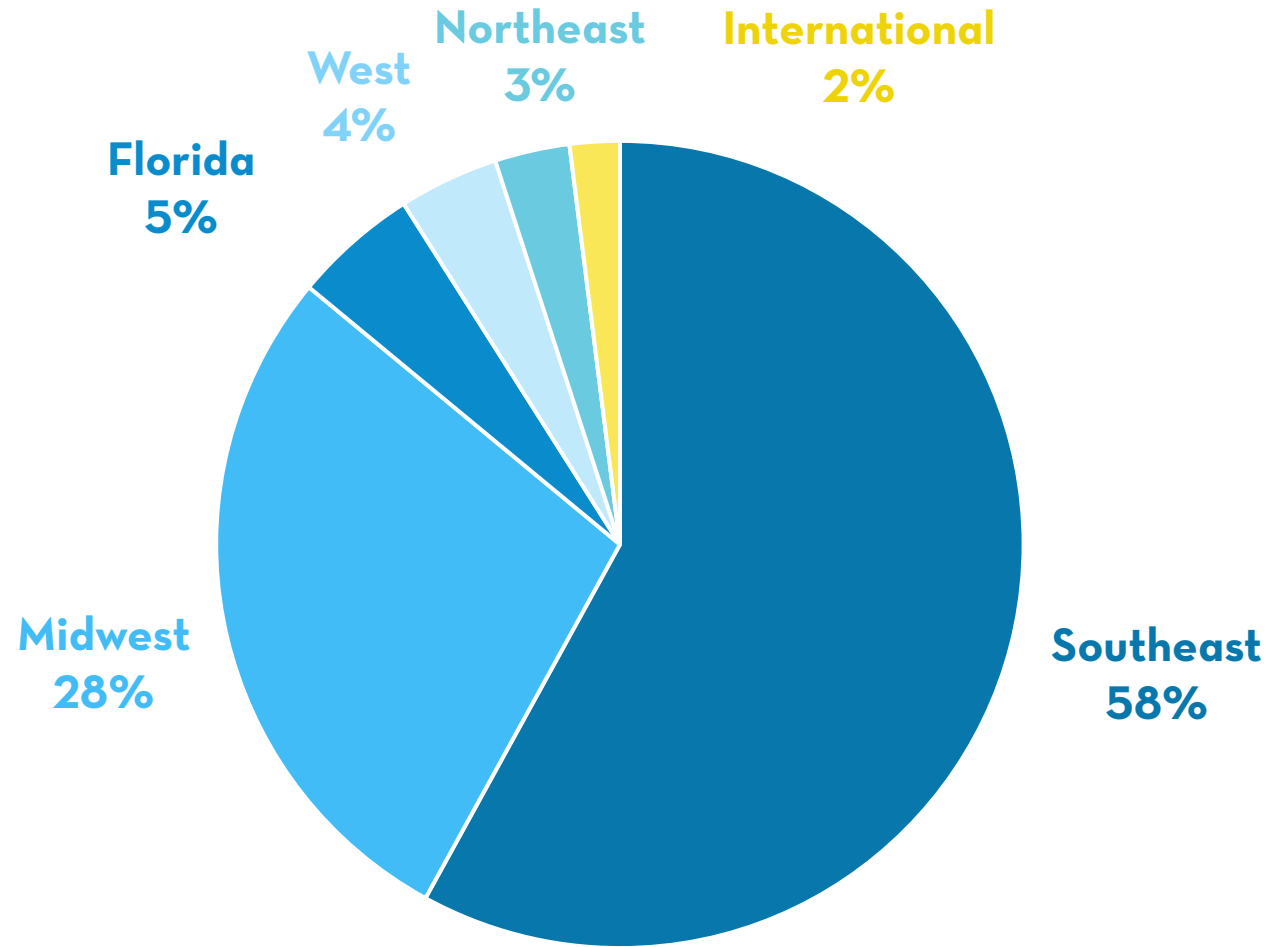
24% who **fly** use the following airports:



VISITOR JOURNEY: TRAVEL PARTY PROFILE

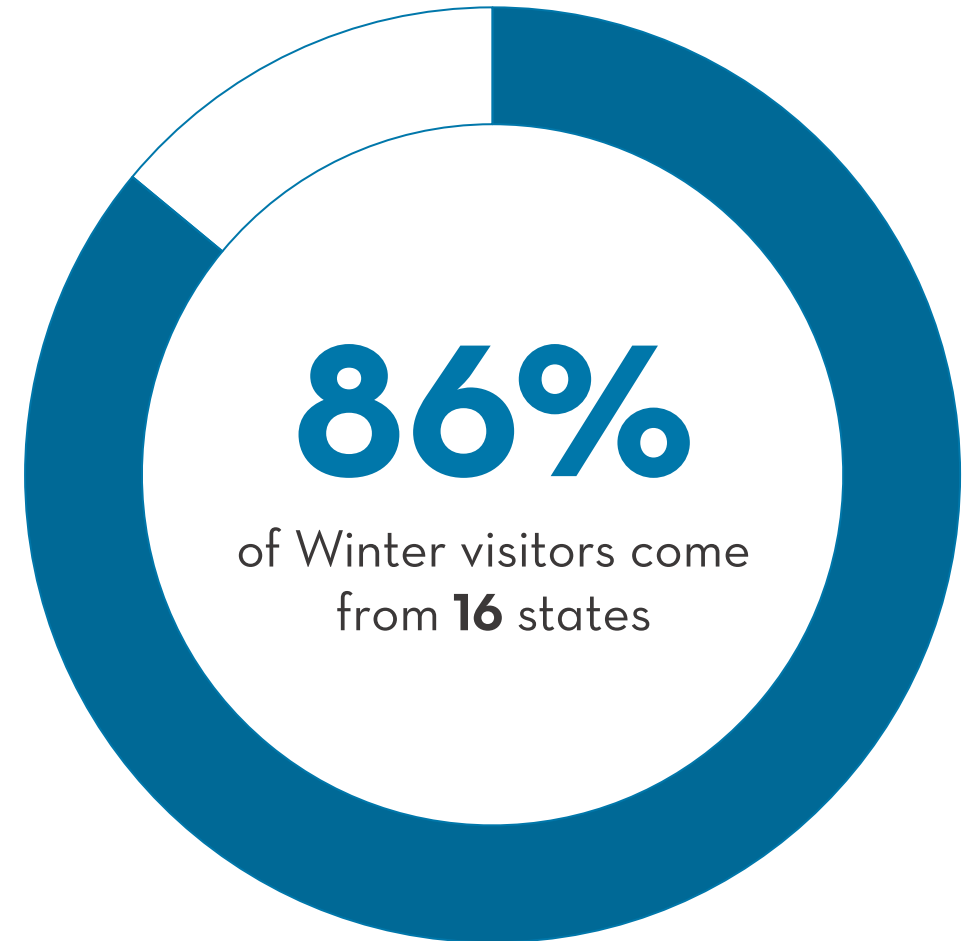


ORIGIN OF WINTER VISITORS



ORIGIN OF WINTER VISITORS

State	% of Visitors
Georgia	12%
Tennessee	11%
Alabama	9%
Mississippi	9%
Texas	8%
Florida	5%
Indiana	4%
Kentucky	4%
Louisiana	4%
Michigan	4%
Minnesota	4%
Illinois	3%
Ohio	3%
Arkansas	2%
Missouri	2%
Wisconsin	2%



ORIGIN OF WINTER VISITORS



11% (-1% points from 2024) of all visitors come from the **Atlanta** market



8% (+1% points from 2024) of visitors are from the **Nashville** market

Top Origin Markets	% of Visitors
Atlanta	11%
Nashville	8%
Minneapolis-Saint Paul	3%
Dallas-Fort Worth	3%
Columbus-Tupelo-West Point	3%
Chicago	3%
Mobile-Pensacola	3%
New Orleans	2%
Birmingham	2%
Houston	2%
Montgomery	2%
Columbus, OH	2%
Cincinnati	2%
Louisville	2%
Indianapolis	2%

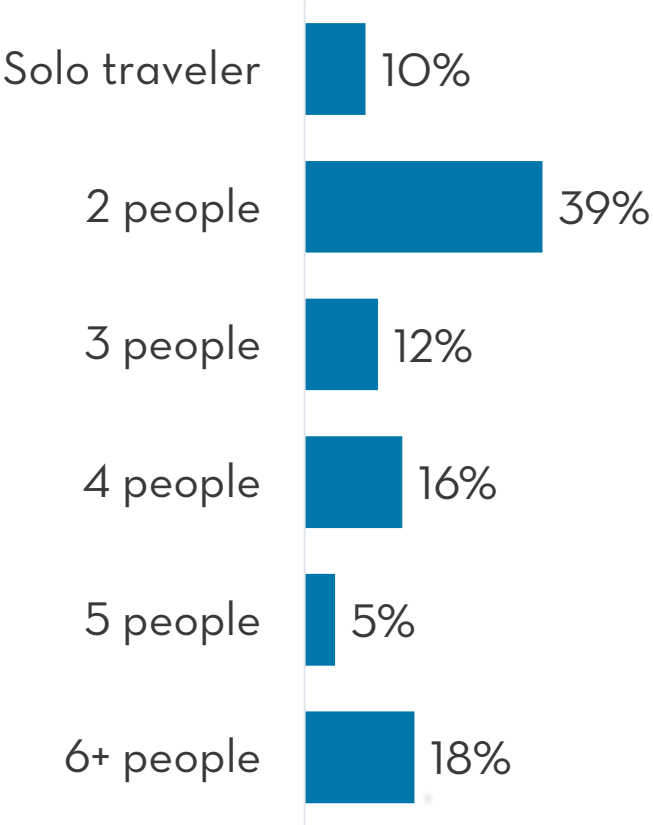
TRAVEL PARTY SIZE AND COMPOSITION



Visitors travel in a party composed of **3.5** people (consistent with 2024)



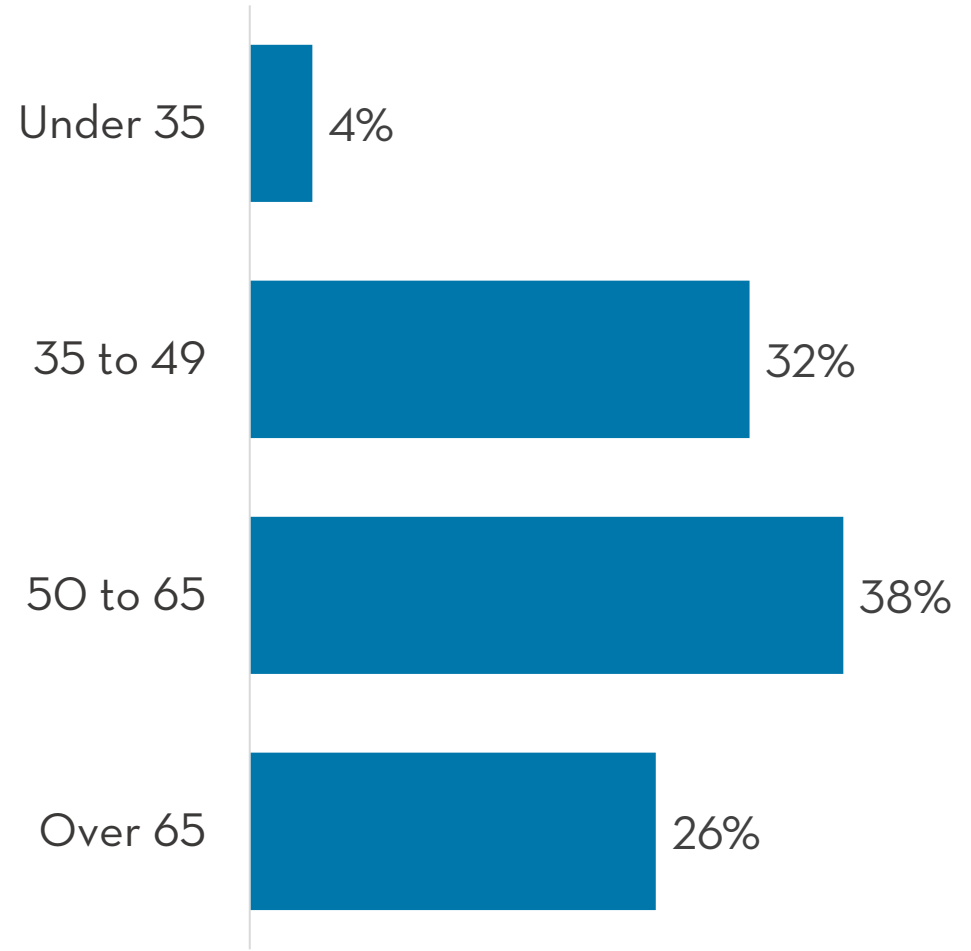
34% (+1% points from 2024) of visitors travel with children under the age of 20




AGE OF WINTER VISITORS



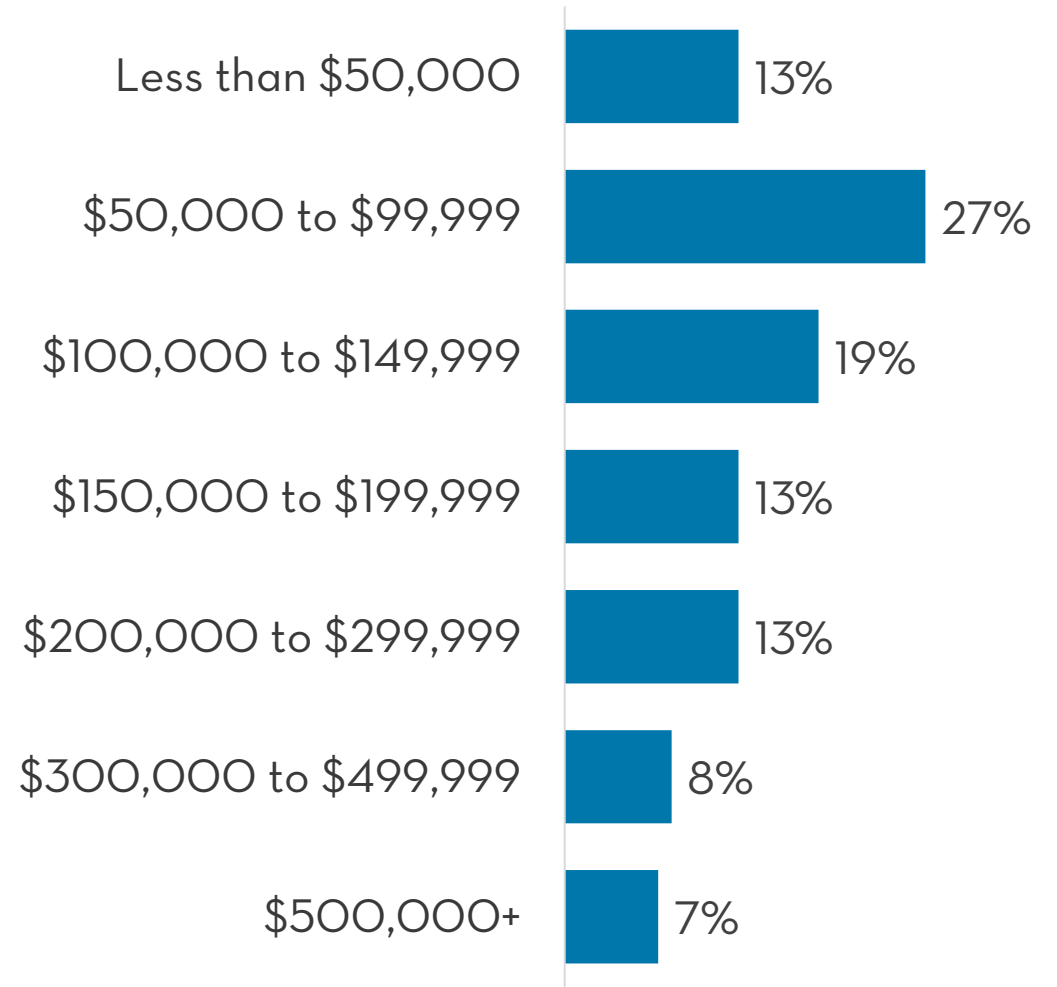
Median age of Winter visitors is **56 years old** (55 years old in 2024)



TOTAL HOUSEHOLD INCOME



Winter visitors have a **median** household income of **\$126,300** (\$147,400 in 2024), while estimated **average** household income is **\$172,800** (\$186,000 in 2024)



VISITOR JOURNEY: TRIP EXPERIENCE



VISITOR ACCOMMODATIONS



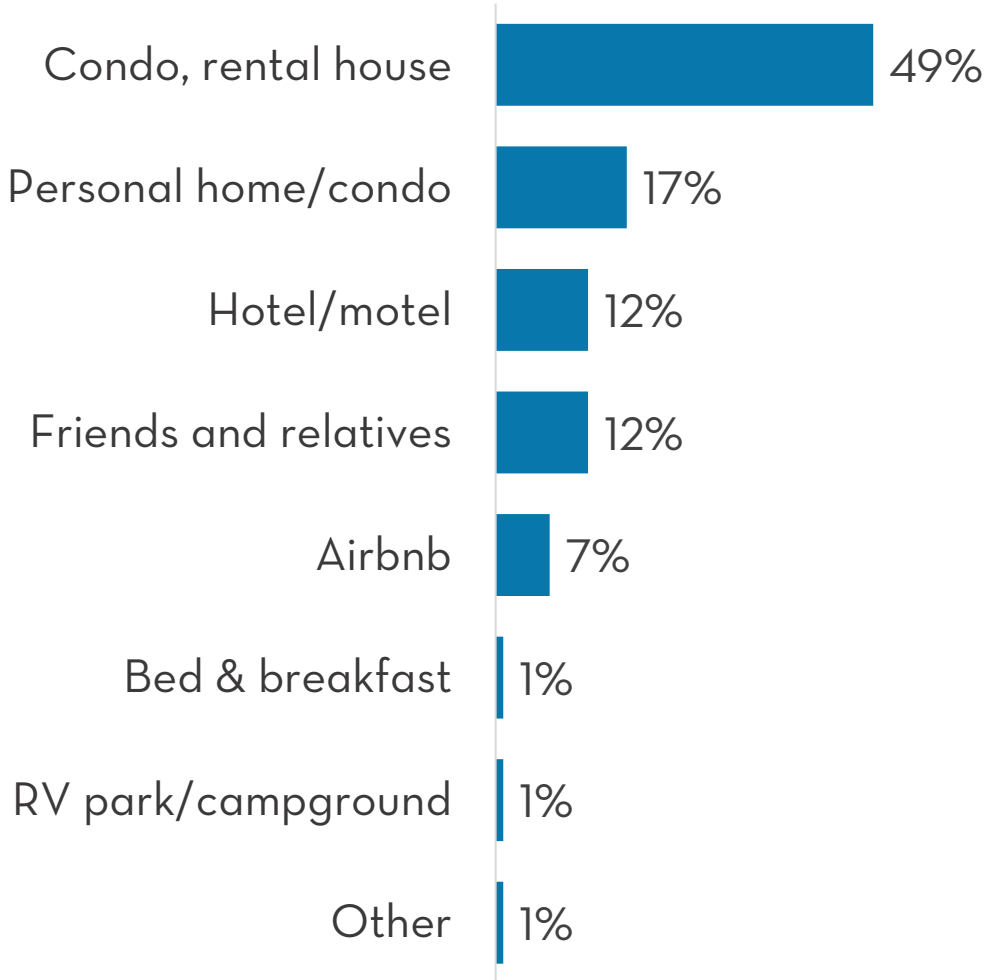
Nearly half of Winter visitors stay in a condo or rental house



17% visitors stay in their personal home or condo



12% stay in hotels or with friends and relatives



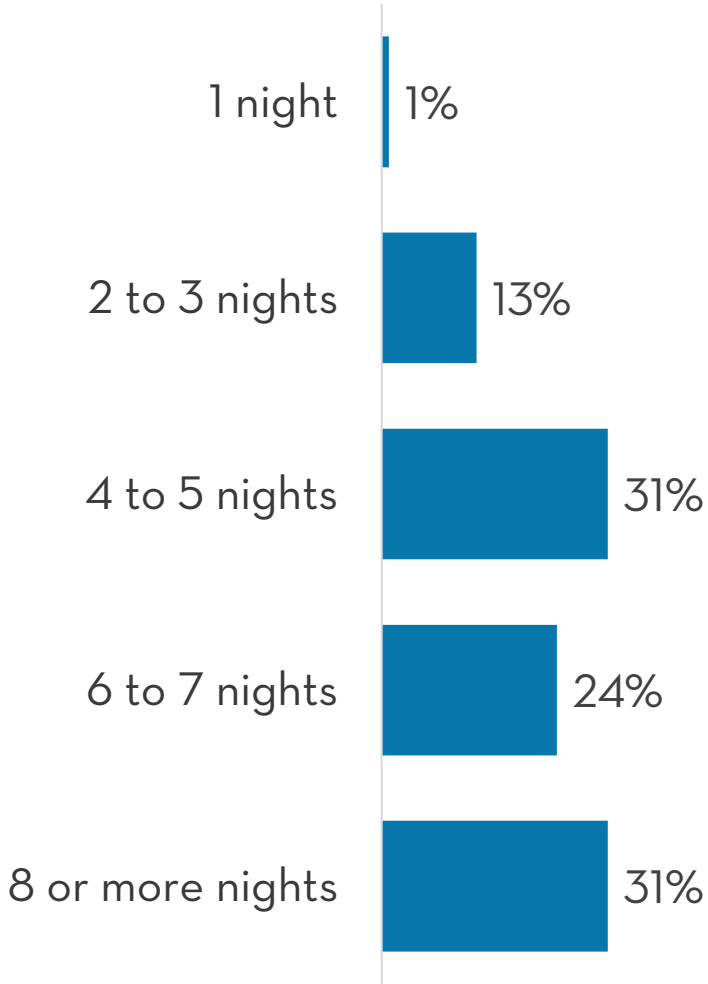
LENGTH OF STAY



Winter visitors¹ stay an average of **7.4** nights² in Walton County (7.1 nights in 2024)



Winter visitors staying in paid accommodations spend an average of **8.5** nights² in Walton County (8.5 nights in 2024)



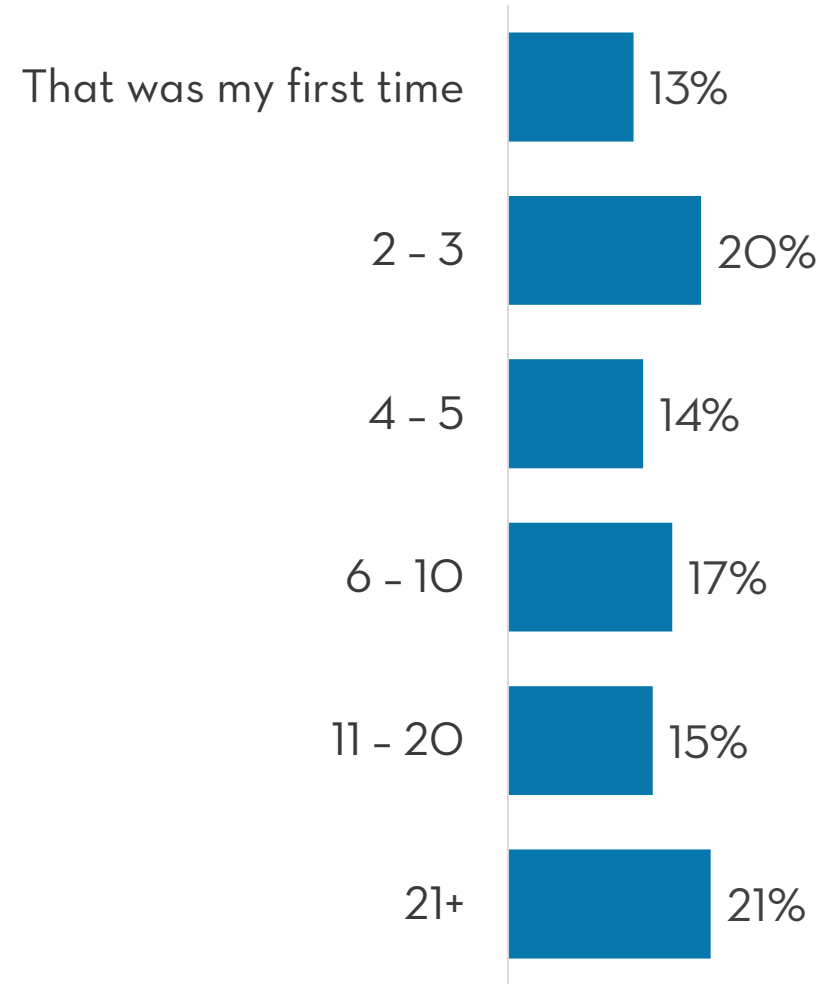
¹Includes visitors staying paid accommodations, non-paid, and day trippers.

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

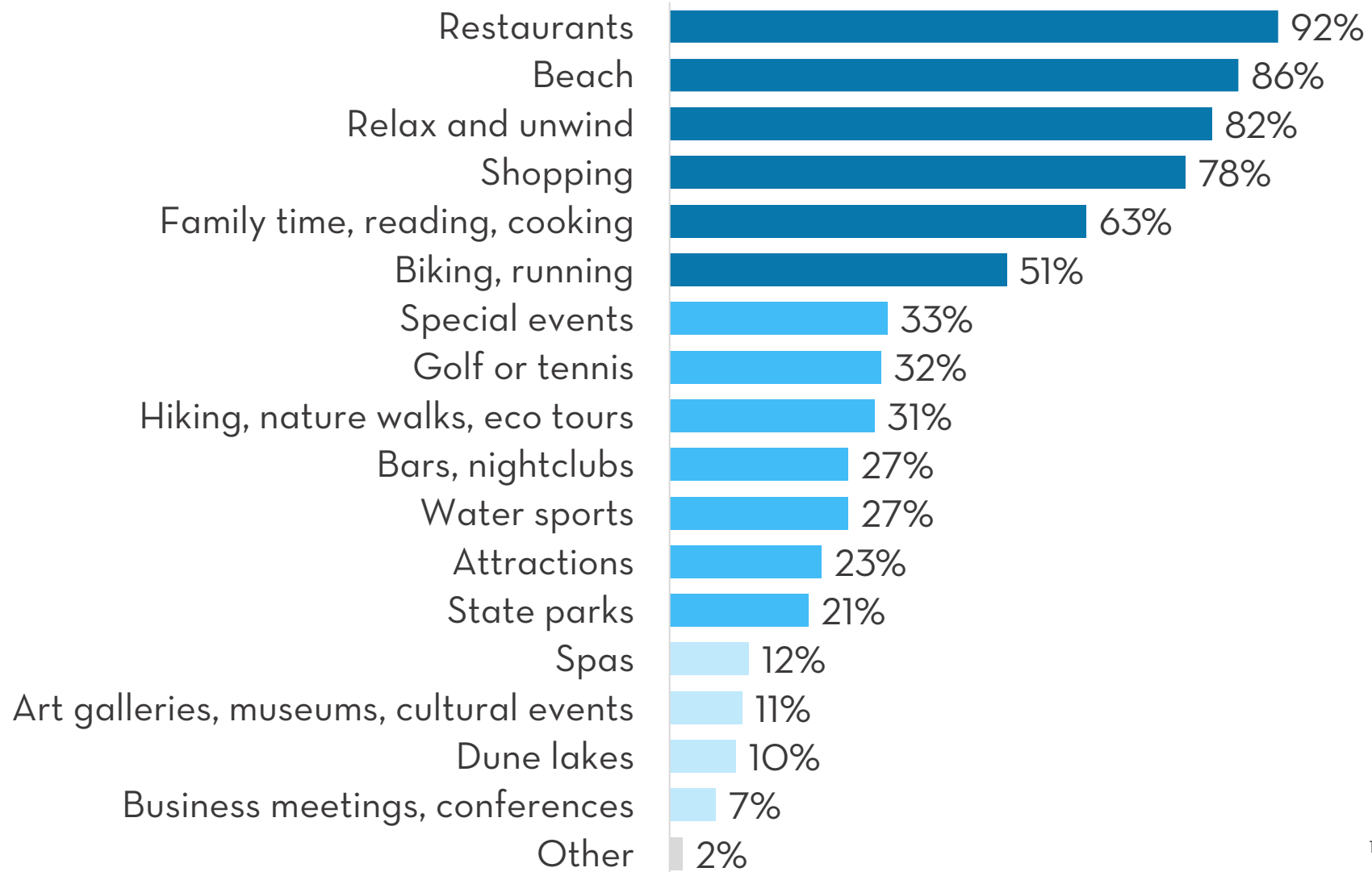
NUMBER OF VISITS TO WALTON COUNTY

13% (-1% points from 2024) of Winter visitors are visiting for the first time

36% (-2% points from 2024) of Winter visitors have visited Walton County more than 10 times



VISITOR ACTIVITIES¹

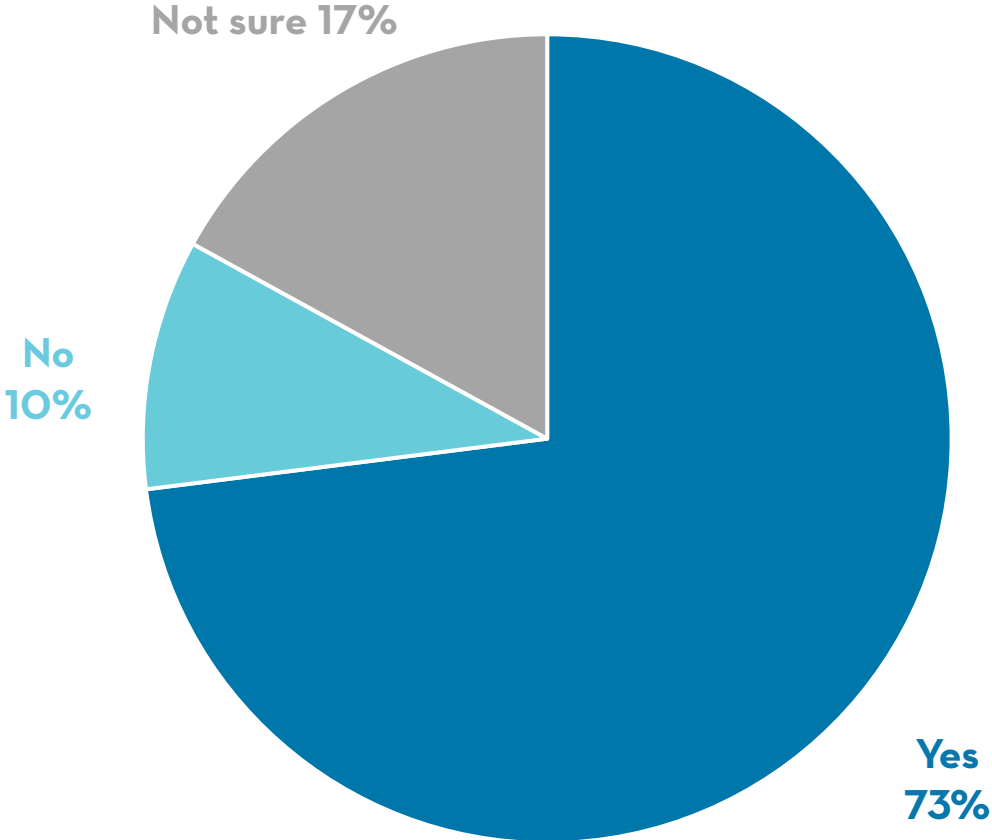


¹Multiple responses permitted.

BEACH SAFETY



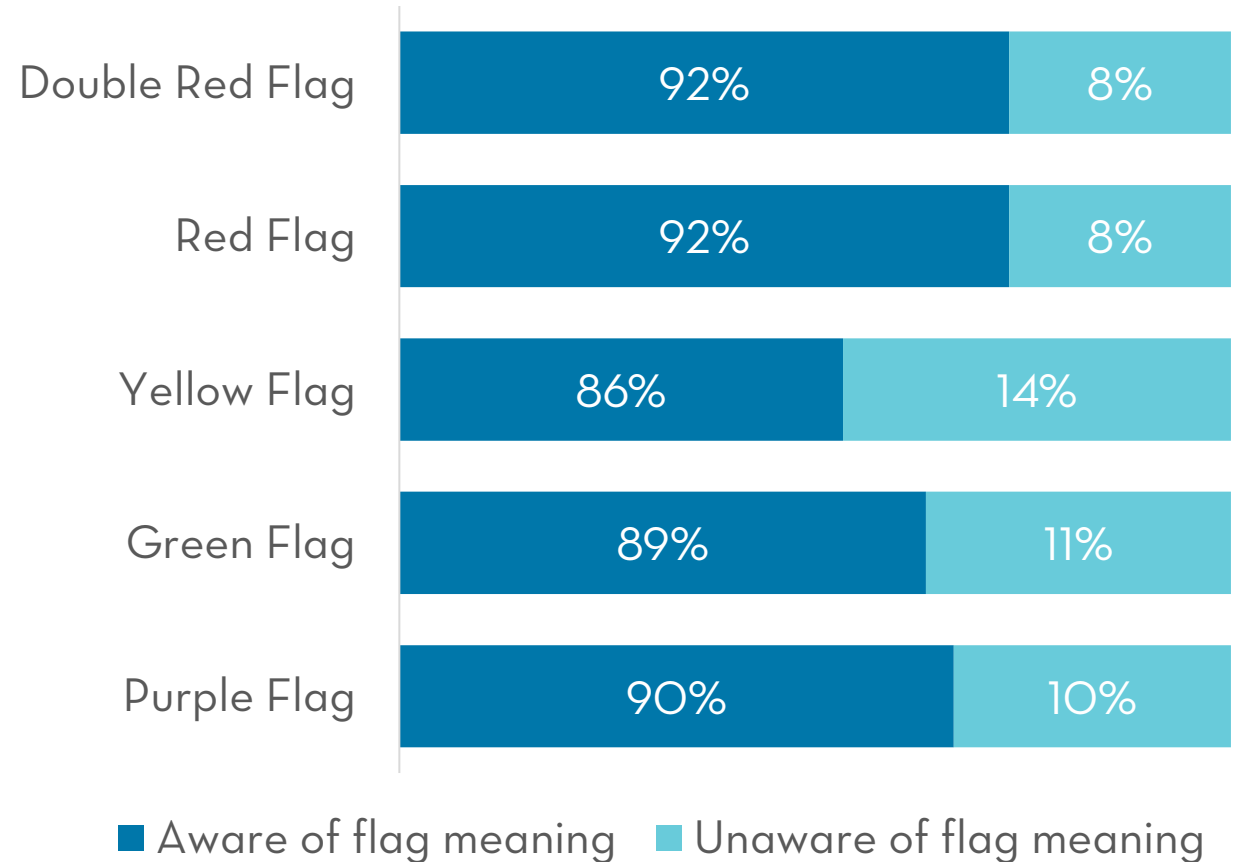
73% of Winter visitors know there are flags posted along the beaches to indicate how safe it is to go into the water



BEACH FLAG AWARENESS

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

68% (+5% points from 2024) 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

- » The typical travel party spends **\$509** (\$546 in 2024) a day while in Walton County.
- » The typical travel party spends a total of **\$3,760** (\$3,890 in 2024) while visiting Walton County.
- » Compared to 2024, total trip expenditures per travel party decreased 3% despite a longer length of stay, with the largest decreases in Shopping (-20%).
- » 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	\$162	\$1,200
Restaurants	\$111	\$820
Groceries	\$56	\$410
Shopping	\$105	\$780
Entertainment	\$35	\$260
Transportation	\$33	\$240
Other	\$7	\$50
Total	\$509	\$3,760

¹ Includes overnight visitors and day trippers.

VISITOR JOURNEY: POST-TRIP EVALUATION



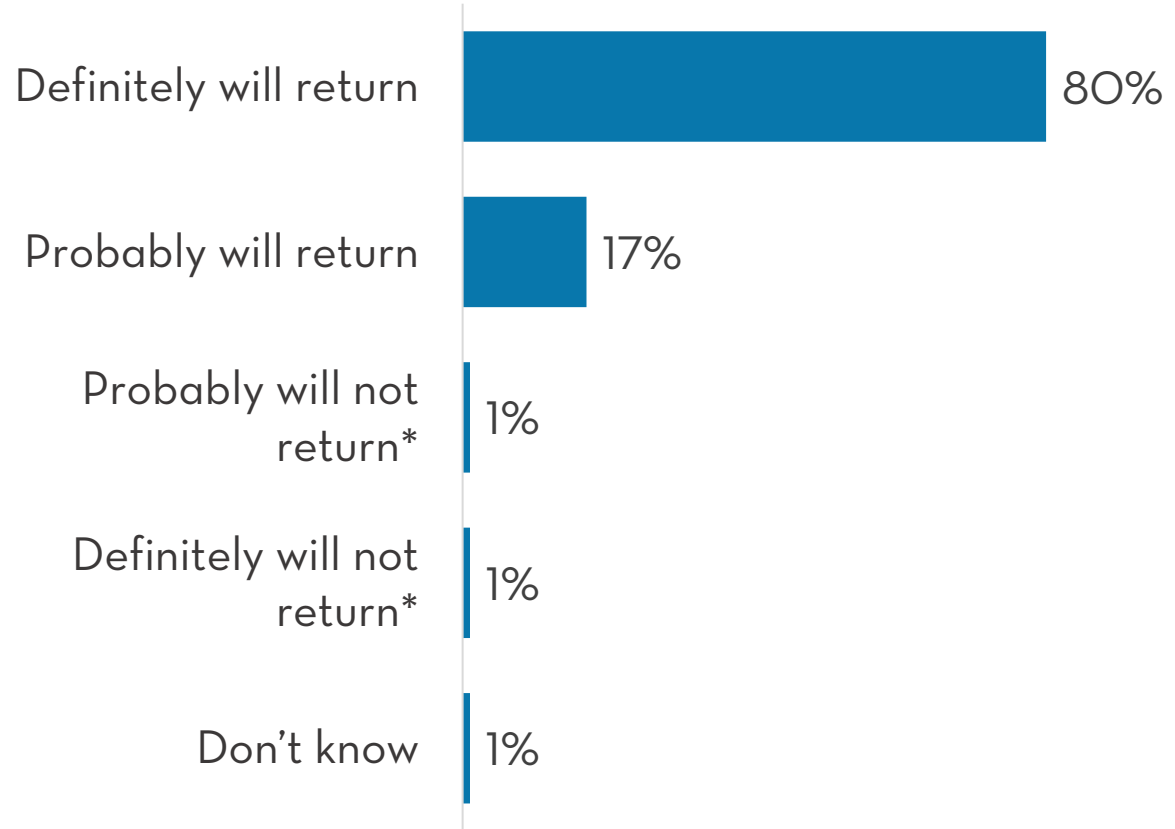
RATING AND LIKELIHOOD OF RETURNING TO WALTON COUNTY



Visitors gave Walton County a rating¹ of **9.3** (consistent with 2024) as a place to vacation



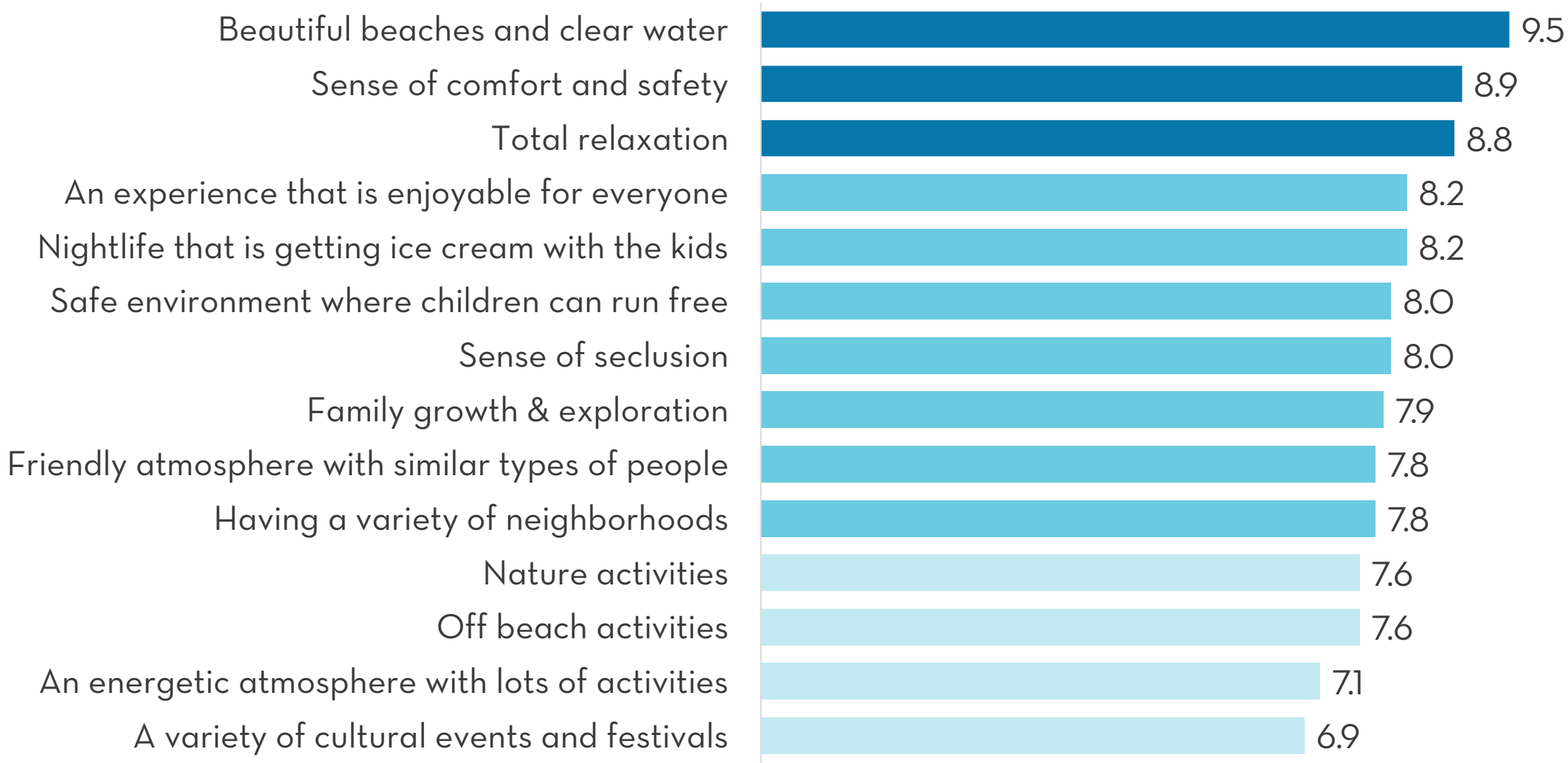
4 in 5 Winter visitors will definitely return to Walton County



¹10 = Excellent; 1= Poor

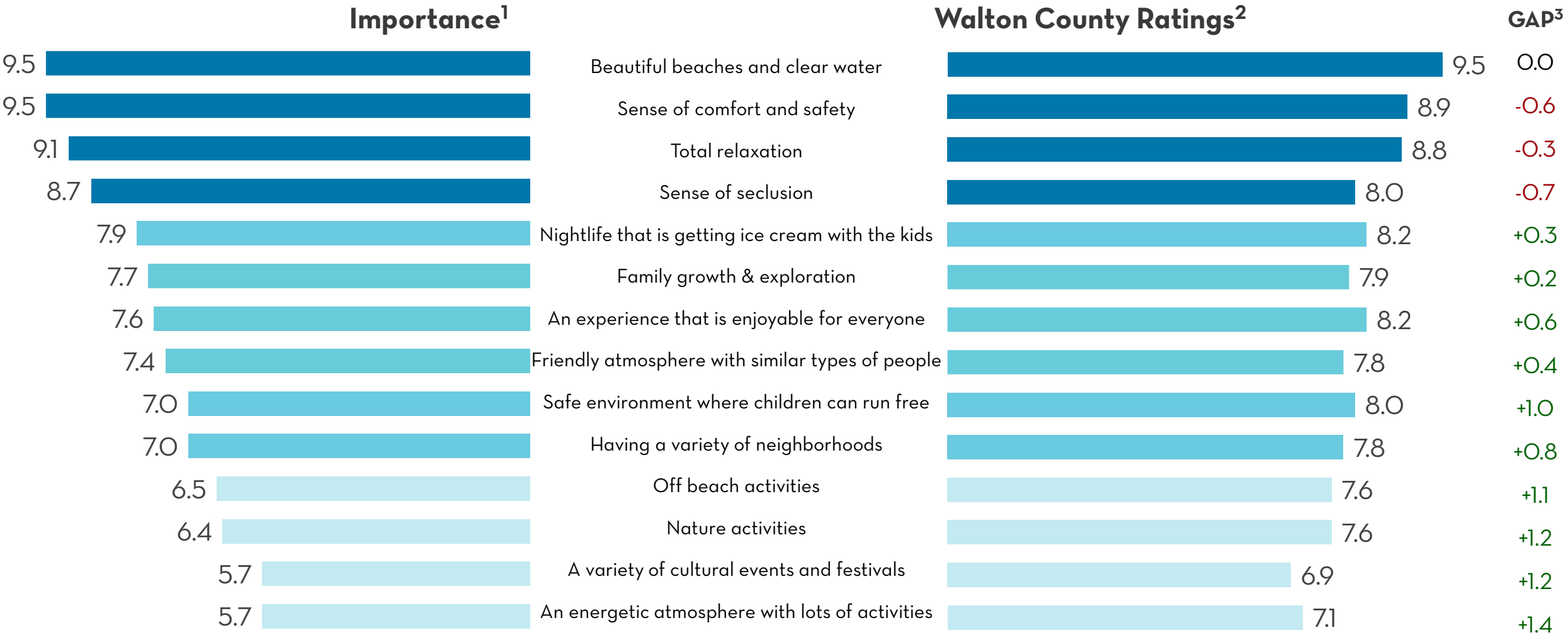
²3% of visitors who are uncertain about returning to Walton County for the following reasons:
1. Too expensive 2. Not enough to do during the day 3. Not enough to do at night

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 9.5. Visitors rated WC as 9.5 on its beaches. Hence, the GAP is 0.0.

AREA DESCRIPTIONS



“Beautiful beaches, excellent restaurants, and top-notch shopping.”

“A place where you can park your car for the whole week and walk everywhere you need to go. Quiet, safe, amazing food, wonderful shopping.”

“Heavenly turquoise water, lovely white sandy beaches.”

“Picturesque, safe, family-friendly place with amazing restaurants and beautiful beaches.”

“Best beaches in the U.S.!”

“Great clean beaches, magnificent all-around restaurants, coffee shops, places to eat and drink, all within easy walking distance from accommodations. Very quaint with awesome views and architecture. A must see!!”

AREA DESCRIPTIONS



“Upscale, great shops, restaurants, and towns.”

“Some of the best beaches & white sugar sand in the U.S. and much more convenient to visit than the Caribbean for quick getaways.”

“Perfectly bougee, quiet, beautiful, quaint, and relaxing. Great accommodations. Friendly locals.”

“Gorgeous emerald-colored ocean with a beautiful white sand beach!”

“Family-friendly fun!”

FEELINGS ASSOCIATED WITH WALTON COUNTY



“Serene. Beautiful beaches. Lots of good restaurant options.”

“Romance, white sands.”

“This place should make me so happy, but I’m so sad because I can’t be here all the time.”

“Nothing like a day at the beach to soak up everyday worries.”

“Love the sunshine and friendliness of everyone.”

“Tranquility and peace.”

“Joyful.”

“Good place for family togetherness.”

“Familiarity, white sand, blue water.”

“Quality family time.”

“Peaceful, relaxing, beautiful.”

“Bliss.”

OPPORTUNITIES FOR IMPROVEMENT



“We don't talk about it. 30A has gotten way too crowded in recent years and we don't want any more people there.”

“In the past it was a nice getaway with nice lodging options and amenities. Now it is becoming entirely too congested, too commercialized, and is losing its special coastal vibe. There is a severe lack of infrastructure to support the masses. Parking, golf carts clogging up 30A, beach access issues, and roving crowds of unruly teens are all big negatives that will likely force us to look elsewhere.”

“The most beautiful beaches anywhere but becoming too crowded with too many chair vendors.”

“If you love beach vacations, this is a great family spot. If you have other family members that are not wanting beach time, it could be challenging to find other things to do.”

“Beautiful beaches. Cool architecture and a formerly cool, laid-back, no-worries, everyone-gets-along atmosphere. But 30A has been destroyed by beach-front owners privatizing the beach. Spring break and summer have been made unlivable by parents allowing their kids to roam unsupervised.”

WALTON COUNTY TOURISM

Winter 2025 Visitor Tracking Study December 2024 - February 2025

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