



Visit South Walton

Visitor Tracking Study Fall 2018

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RESEARCH



Study Objectives

- Profile travel parties to South Walton
- Motivation for visiting
- Likelihood of returning
- Mode of transportation
- Importance of vacation attributes & rating of South Walton
- Daily expenditures & expenditures by category
- Trip planning information
- Use of South Walton Visitors Guide
- Noticed South Walton messaging
- Demographic profile of visitors

Methodology

- Internet & on-site surveys
- Sample Size – 663 completed interviews¹
- Target Individuals: Visitors to South Walton in September, October, and November 2018

¹Interviews are with out-of-county guests who stay at properties/vacation rentals at beach communities across South Walton, and at various locations along the beaches. It should be noted that 405 interviews were conducted via face-to-face interviews along the beach and in public areas. This is a higher number than in Fall 2017.

Executive Summary

Tourism Metrics – Fall 2017 vs. Fall 2018

An increase in active units from 12,365 in Fall 2017 to 13,270 in Fall 2018, coupled with increases in occupancy and ADR led to a healthy increase in TDT of 14.4%.

Numbers of visitors were up 4.9% despite travel party sizes being slightly smaller and people staying slightly fewer nights.

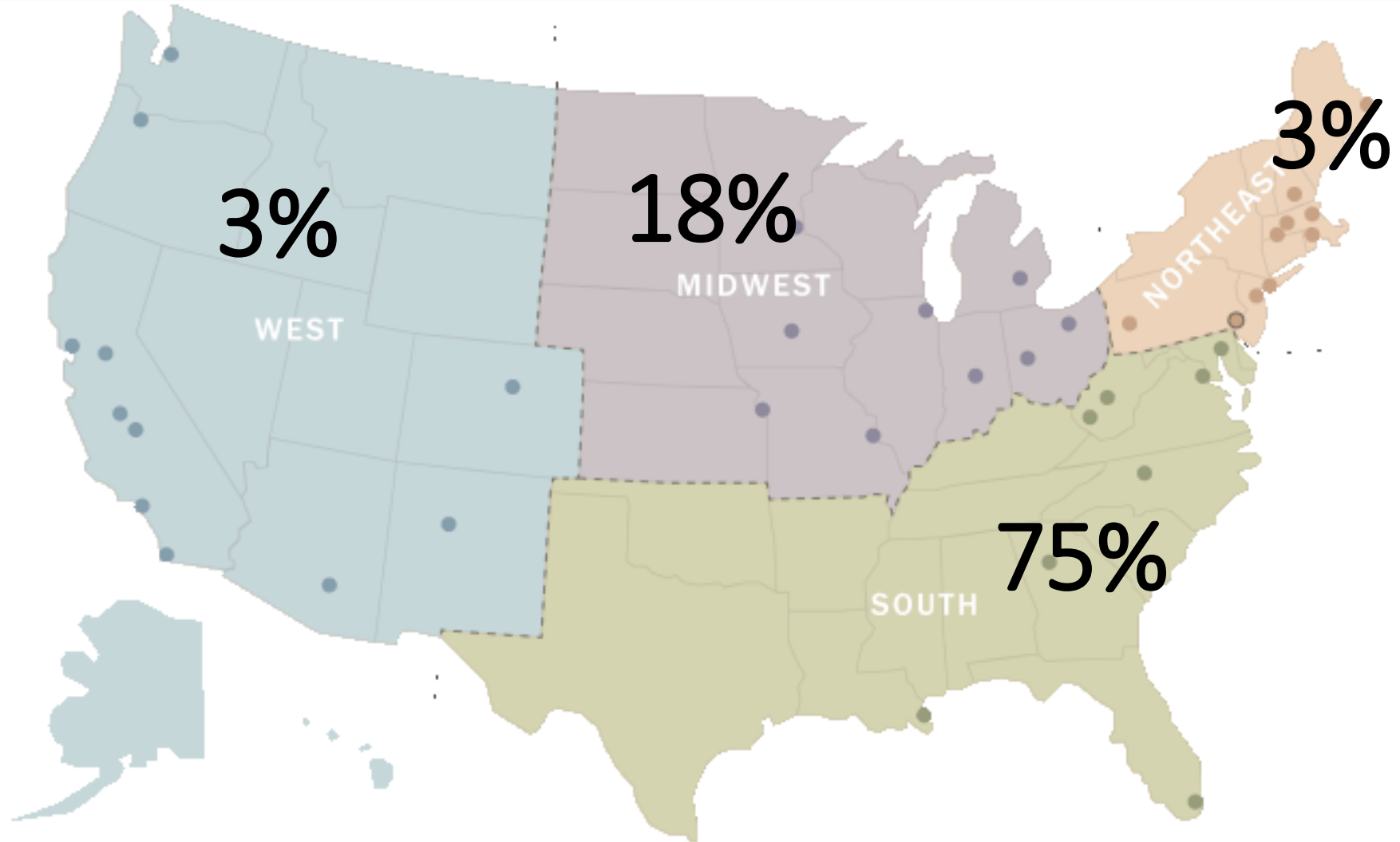
Direct spending was up more (7.6%) than numbers of visitors (4.9%). RevPAR was up 6.4% despite the inventory increase.

Property Statistics	Fall 2017	Fall 2018	% Change
Room nights	549,800	579,100	+5.3%
Total visitors	609,700	639,500	+4.9%
TDT collections	\$4,117,973	\$4,710,885	+14.4%
Direct spending	\$626,063,300	\$673,644,100	+7.6%
Economic impact	\$926,573,700	\$996,993,300	+7.6%
Occupancy	45.1%	46.5%	+3.1%
Room rates	\$248.13	\$255.95	+3.2%
RevPAR	\$111.91	\$119.02	+6.4%

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

¹Adjustments were made to 2017 data based on updated figures from the Walton County Tax Collector and data on a wider range of vacation rentals from Key Data.

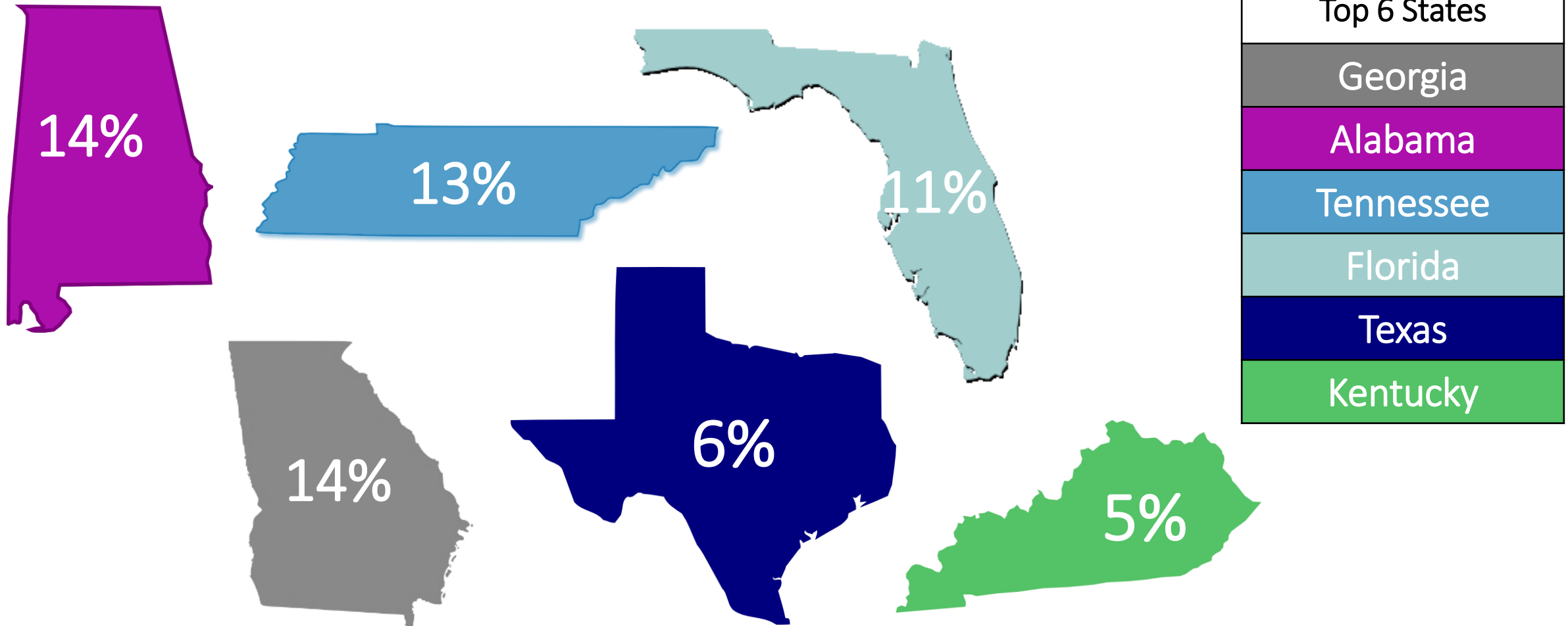
Origin of Visitors



1% of visitors were from areas outside the U.S.

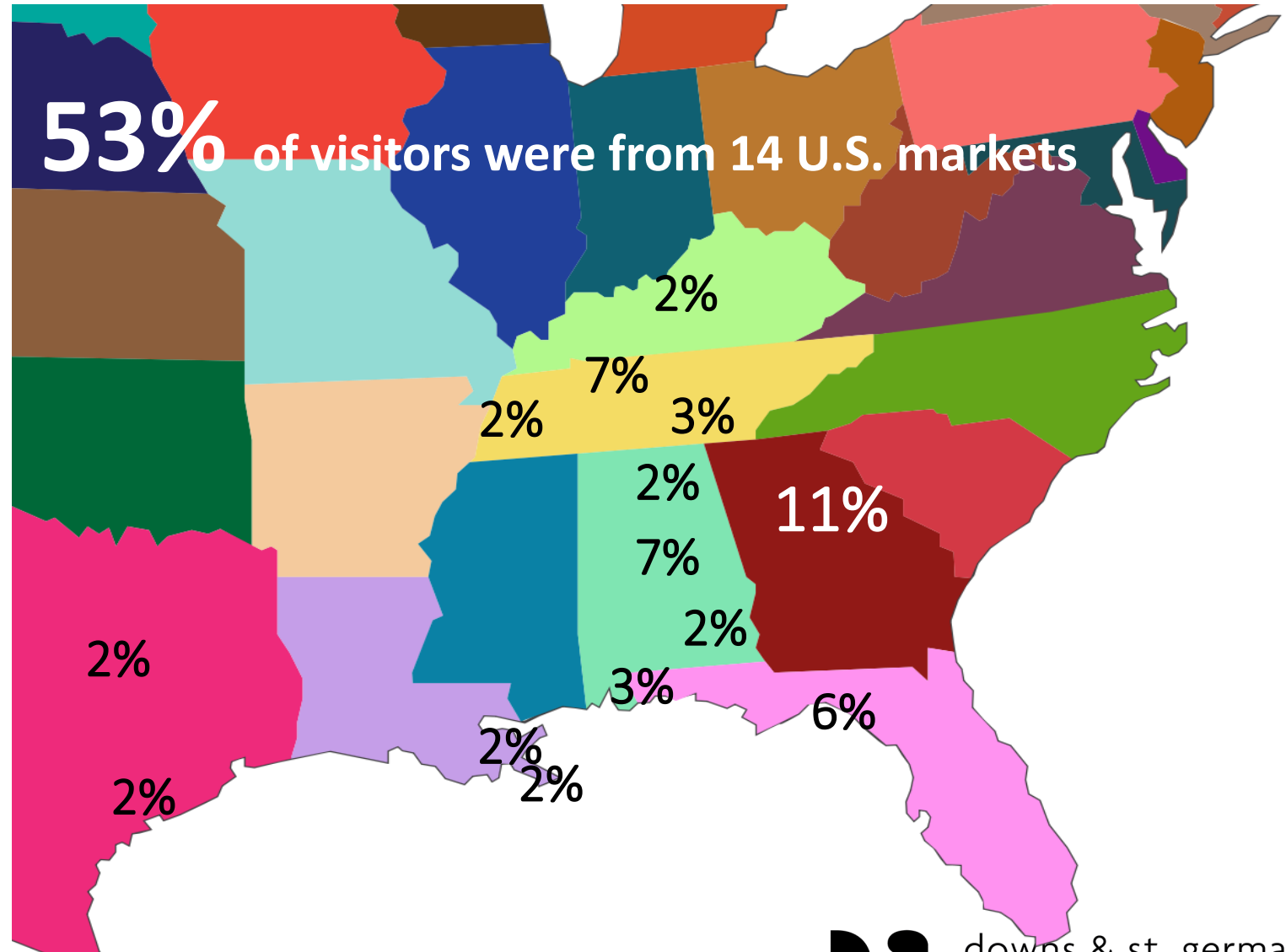
Origin of Visitors

- **63%** of visitors were from 6 states



Origin of Fall Visitors

Top Markets	% of Visitors
Atlanta	11%
Birmingham	7%
Nashville	7%
Panama City-Destin	6%
Chattanooga	3%
Pensacola-Mobile	3%
Baton Rouge	2%
Huntsville	2%
Louisville	2%
Montgomery	2%
Dallas-Ft. Worth	2%
Memphis	2%
New Orleans	2%
Houston	2%



Accommodations

75% - Condos, rental houses, etc.



10% - Hotels



8% - Friends & relatives



Travel Parties

The typical visitor traveled in a party composed of **4.7** people



41% traveled with at least one person under the age of 20 in their travel party



Length of stay

- Visitors spent **6.4¹** nights in South Walton



¹Visitors who stayed 30 or fewer nights.

Profile – Typical Vacationer¹

→The typical Vacationer¹ Visitor:

→Is 54 years old

→Has a median household income of \$146,000

→Is female (59%)

→46% travel with children

→84% drove

→Is from:

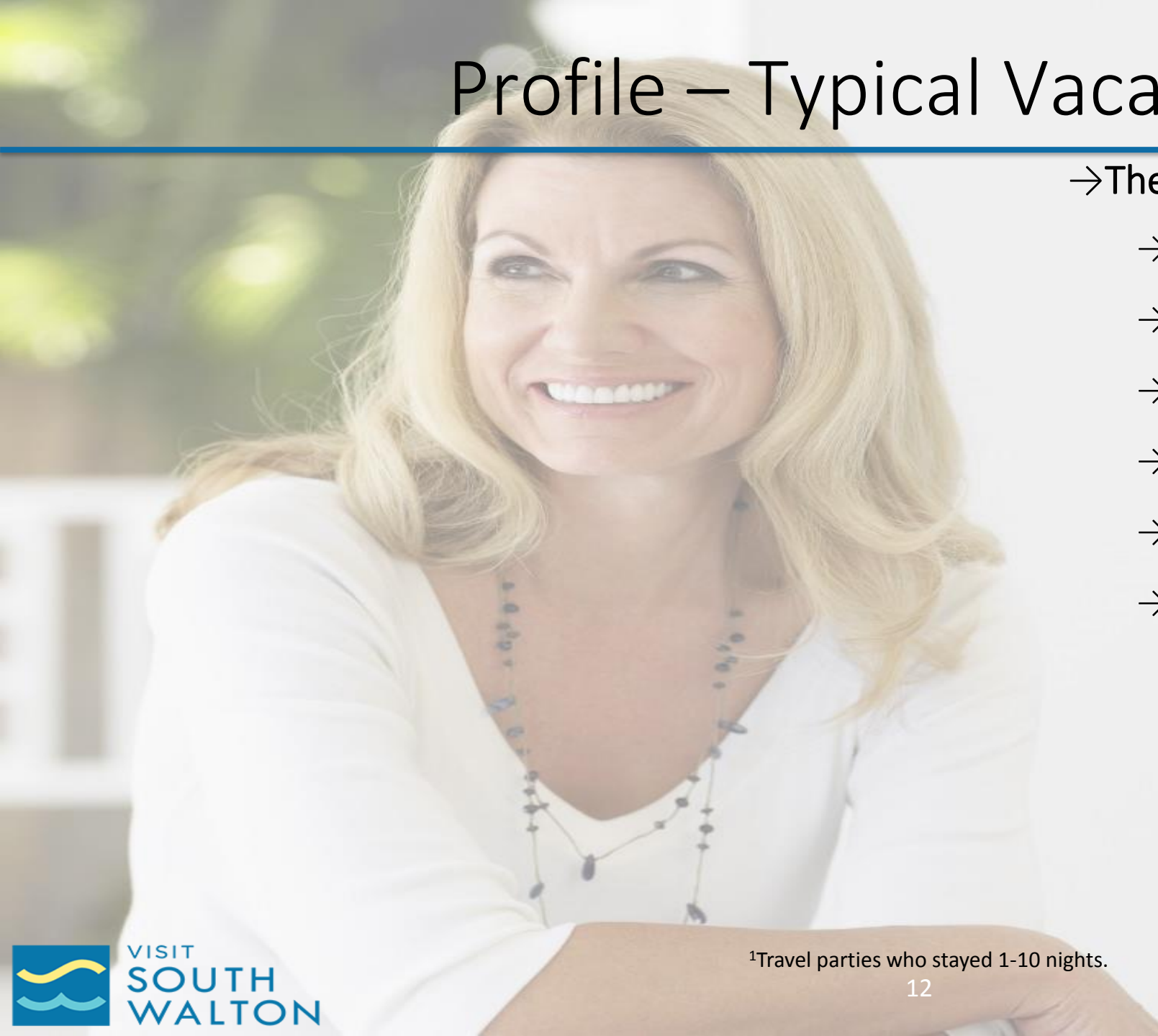
→ Southeast (73%)

→ Midwest (19%)

→ Northeast (3%)

→ West (3%)

→ International (1%)



¹Travel parties who stayed 1-10 nights.

Profile – Typical Long-Term¹ Visitor

→The typical Long-Term¹ Visitor:

→Is 56 years old

→Has a median household income of \$234,800

→Is female (52%)

→80% did not travel with children

→84% drove

→Is from:

→Southeast (75%)

→Midwest (21%)

→International (3%)



¹Travel parties who stayed more than 10 nights.

Profile – Typical Day Tripper

→ The typical Day Trip Visitor:

→ Is 49 years old

→ Has a median household income of
\$178,600

→ Is female (51%)

→ 72% did not travel with children

→ 100% drove to South Walton

→ Is from:

→ Florida (71%)

→ Southeast – not including FL (29%)



Top Booking Accommodations

- Visitors used the following to book their Fall trip:

Vacation Rental Company (56%)

NEWMAN-DAILEY
RESORT PROPERTIES, INC.

RIVARD
BY OCEAN REEF VACATION RENTALS

360 BLUE

SUNBURST
BEACH VACATIONS

Southern
RENTALS & REAL ESTATE

DUNE ALLEN REALTY
Vacation Rentals

HOMEOWNER'S
COLLECTION
Seaside, Florida

Hotel/condo (31%)

Sandestin[®]
Golf and Beach Resort



THE
PEARL

hotel • dining • spa

VRBO, Homeaway (9%)

HomeAway[®]

VRBO[®]
from HomeAway[®]

VacationRentals.com[™]
Part of the HomeAway Family

Transportation

- 85% of visitors **drove** to South Walton
- 15% who **flew** used the following airports:

46%

Northwest Florida Beaches
International Airport



36%

Destin-Ft. Walton Beach Airport



14%

Pensacola International
Airport



Visitation

- 13% were first-time visitors
- 45% had visited more than 10 times



Visitor satisfaction

- Visitors gave South Walton a rating of **9.1¹** as a place to vacation
- **96%** will return to South Walton²



¹10 = Excellent; 1 = Poor

²About 3% of visitors will probably not return to South Walton because of the following reasons:

1. Poor customer service, 2. traffic was a problem, 3. too expensive, 4. prefer variety in vacation spots

Top reasons for visit¹

To relax and unwind (58%)



Family vacation (55%)



Annual routine (24%)



Special occasion (19%)



¹Multiple responses permitted.

Top activities during visit¹

Restaurants (93%)



Beach (93%)



Relax and unwind (89%)



Family time, reading, cooking (72%)



Shopping, antiques (64%)



Biking, running, etc. (35%)



Bars & Nightclubs (25%)



Water Sports (20%)



Visitor spending

- Visitors spent **\$674** a day
- Visitors spent **\$4,313** on their trip



Spending per day was \$705 in 2017, and \$4,097 per trip.

Trip planning

- **3 in 10** visitors plan a Fall South Walton vacation 6 months out or more
- Top trip planning sources:

Friends, family



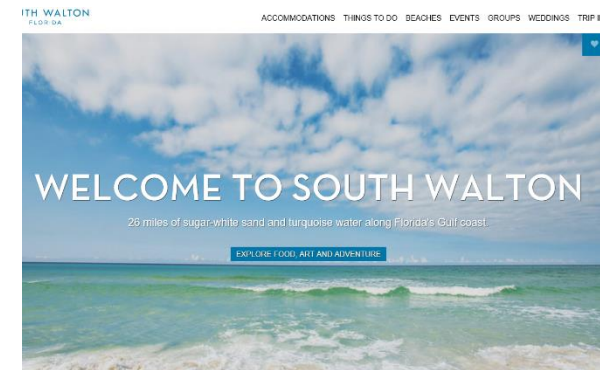
Search on Google, Yahoo, etc.



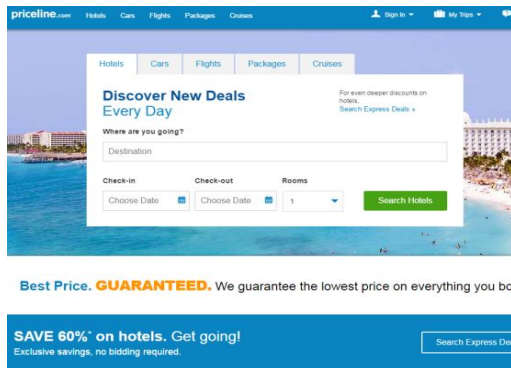
Website for 1 of the 16 beach areas in South Walton



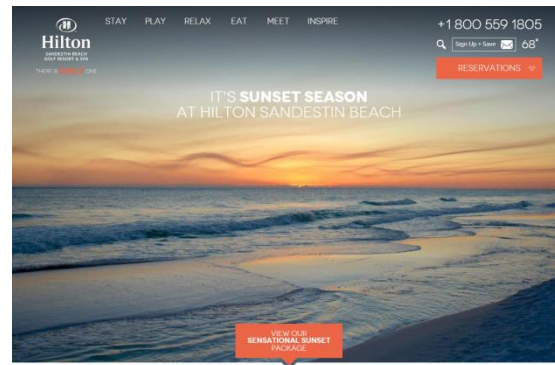
VisitSouthWalton.com



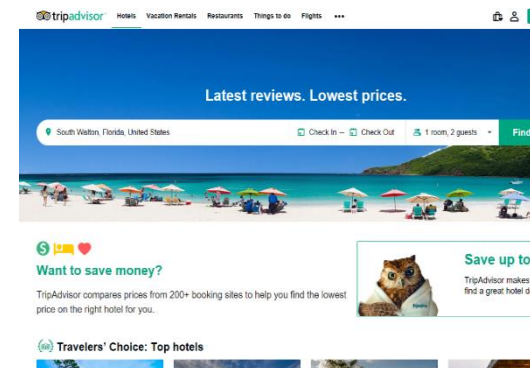
Travel websites



Hotel websites



Online travel reviews and blogs



Brochures/travel guide/
visitors guide



Visitors guide

- **21%** of visitors viewed the South Walton Visitors Guide before going to South Walton
- Visitors Guide received a rating of **7.4 out of 10¹**

¹10 = Extremely useful; 1 = Not at all useful



Other destinations

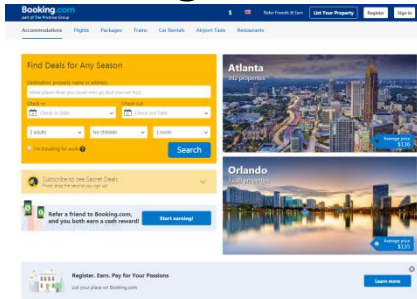
- When planning their trip to South Walton:
 - **56%** of visitors considered going to only 1 of the 16 beach communities
 - **33%** considered going to another South Walton beach community



South Walton Promotions

- **27%** of Fall visitors have recently seen, read, or heard advertising, promotions or travel stories about South Walton
- Top sources of recall:

Rental agency/
booking websites



Magazine article



Television



Online article



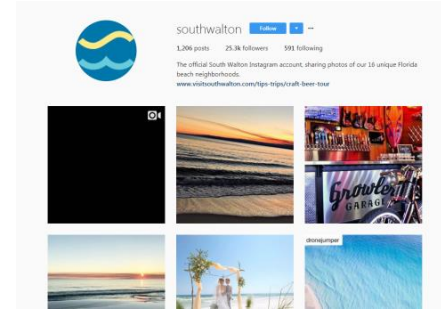
Personal social
media



VisitSouthWalton.com



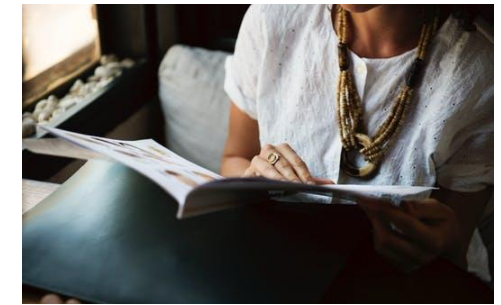
VSW social media accounts



Ad on a website



Magazine Ad



Perceptions of South Walton



Beautiful beaches

“Most beautiful beaches in the United States, and the friendliest people.”



Great place to visit

“Best beaches in the country. Plenty of activities to keep you busy while there. Great places to eat and also to shop. You will find accommodations to fit your budget and needs. I believe it is one of the best places to take your family for a vacation .”



Relaxing

“Laid back and very family friendly. Beautiful beaches and not so crowded.”



Family friendly

“An ideal family vacation where you feel safe letting your children ride their bikes and play.”

Emotions and feelings associated with South Walton¹



¹Coded verbatim responses; multiple responses permitted.

Demographics

- The typical South Walton Fall visitor:
 - **54** years old
 - **Female (58%)**
 - **Median** household income of **\$165,900**
 - **Average** household income of **\$224,000**
 - From the **Southeast (75%)**



Yearly Comparisons

Visitor Profile – Fall 2017 vs. 2018

Visitor Metrics	Fall 2017	Fall 2018
Travel party	4.8	4.7
Kids <20	44%	41%
Median age	55	54
Estimated median household income	\$163,000	\$165,900 ¹
Stayed in condo/rental house	80%	75%
Drove	85%	85%
Nights spent ²	5.8	6.4
Direct expenditures (entire trip) ²	\$4,097	\$4,313
1 st time visitor	17%	13%
10+ visits to South Walton	40%	45%

¹Estimated average household income = \$224,000.

²Visitors who stayed in paid accommodations for up to 30 nights.

Visitor Profile – Fall 2017 vs. 2018

Top Origin States	Fall 2017	Fall 2018
Georgia	14%	14%
Alabama	13%	14%
Tennessee	13%	13%
Florida	12%	11%
Texas	4%	6%
Kentucky	6%	5%
Origins - Regions	Fall 2017	Fall 2018
Southeast	71%	75%
Northeast	3%	3%
West	2%	3%
Midwest	22%	18%
International	2%	1%

Visitor Profile – Fall 2017 vs. 2018

Visitor Activities	Fall 2017	Fall 2018
Restaurant	93%	93%
Beach	91%	93%
Relax & unwind	89%	89%
Family time, read, cook	71%	72%
Shop, antique	68%	64%
Bike, run, etc.	39%	35%
Bars, nightclubs	26%	25%
Water sports	23%	20%
State parks	18%	20%
Attractions	19%	18%
Hiking, nature walks	17%	16%
Special events	17%	16%
Golf & tennis	16%	12%
Art galleries, museums, culture	7%	8%
Dune Lakes	8%	8%

Visitor Profile – Fall 2017 vs. 2018

Visitor Metrics	Fall 2017	Fall 2018
Will return to South Walton	96%	96%
Rating for overall experience ¹	9.2	9.1 ¹
Viewed Visitors Guide	21%	21%
Planned trip	6 months out	6 months out
Used VisitSouthWalton.com	22%	23%
Used 1 of 16 beaches' websites	31%	29%
Use the term "South Walton"	20%	22%

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

²19% used the online version & 2% used the print version.

Tourism Metrics – Fall 2017 vs. 2018

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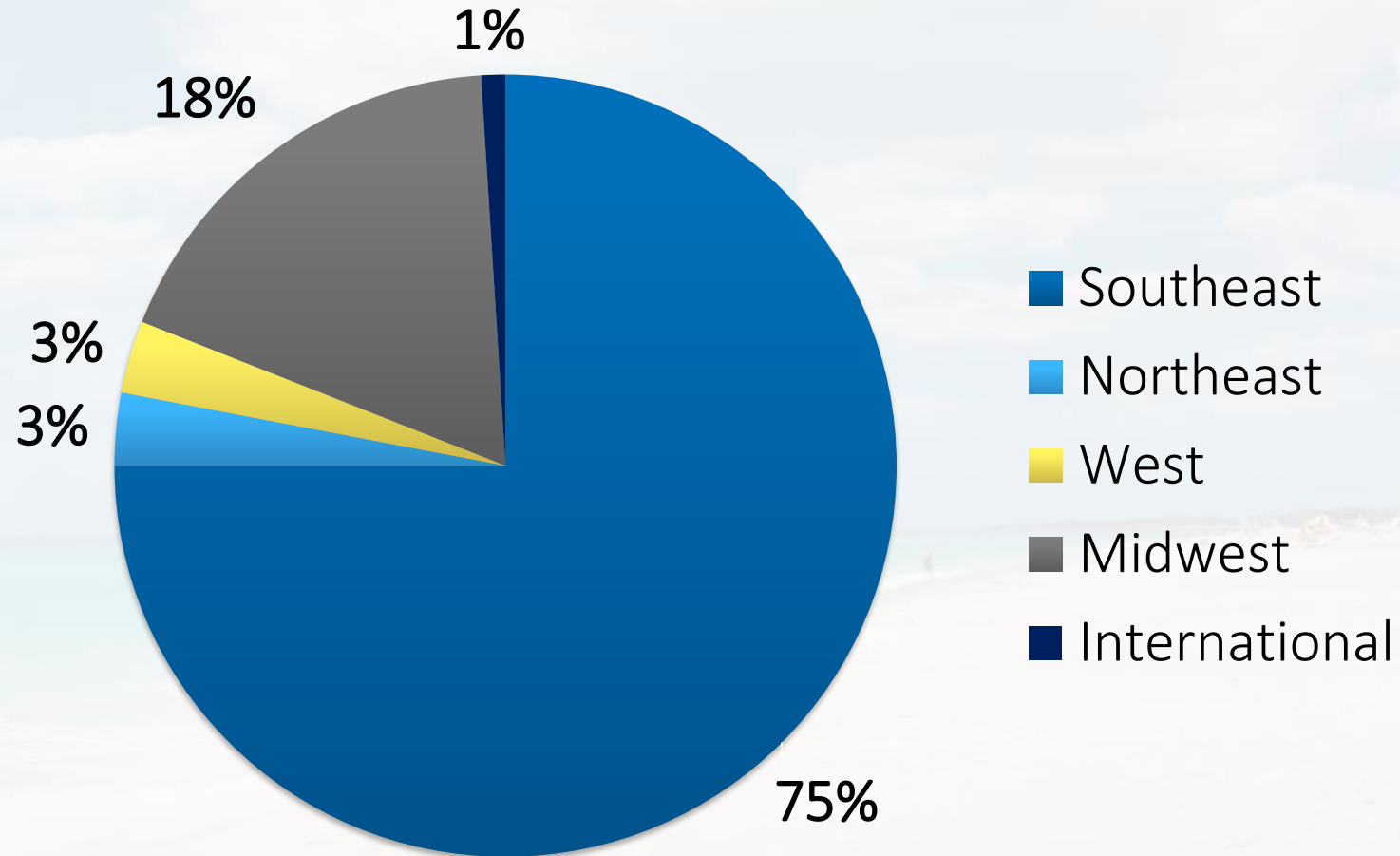
Detailed Findings

Typical South Walton Visitor

- Travel party = **4.7** people
 - **41%** traveled with at least one person under the age of 20 in their travel party
- Was **54** years old
- Was female (**58%**)
- Had a median household income of **\$165,900**
- Was from the **Southeast (75%)**
- Stayed in a **condo or rental house (75%)**

Origin of Fall Visitors

Top Origin Markets	% of Visitors
Atlanta	11%
Birmingham	7%
Nashville	7%
Panama City-Destin	6%
Chattanooga	3%
Pensacola-Mobile	3%
Baton Rouge	2%
Huntsville	2%
Louisville	2%
Montgomery	2%
Dallas-Ft. Worth	2%
Memphis	2%
New Orleans	2%
Houston	2%
St. Louis ¹	1%
Orlando	1%
Tampa Bay	1%
Knoxville	1%
Little Rock	1%
Tallahassee	1%
Cincinnati	1%
Raleigh-Durham, NC	1%
Denver	1%
Indianapolis	1%
Cleveland	1%
Dothan	1%



¹The metro area of St. Louis includes some parts of Missouri and Illinois.

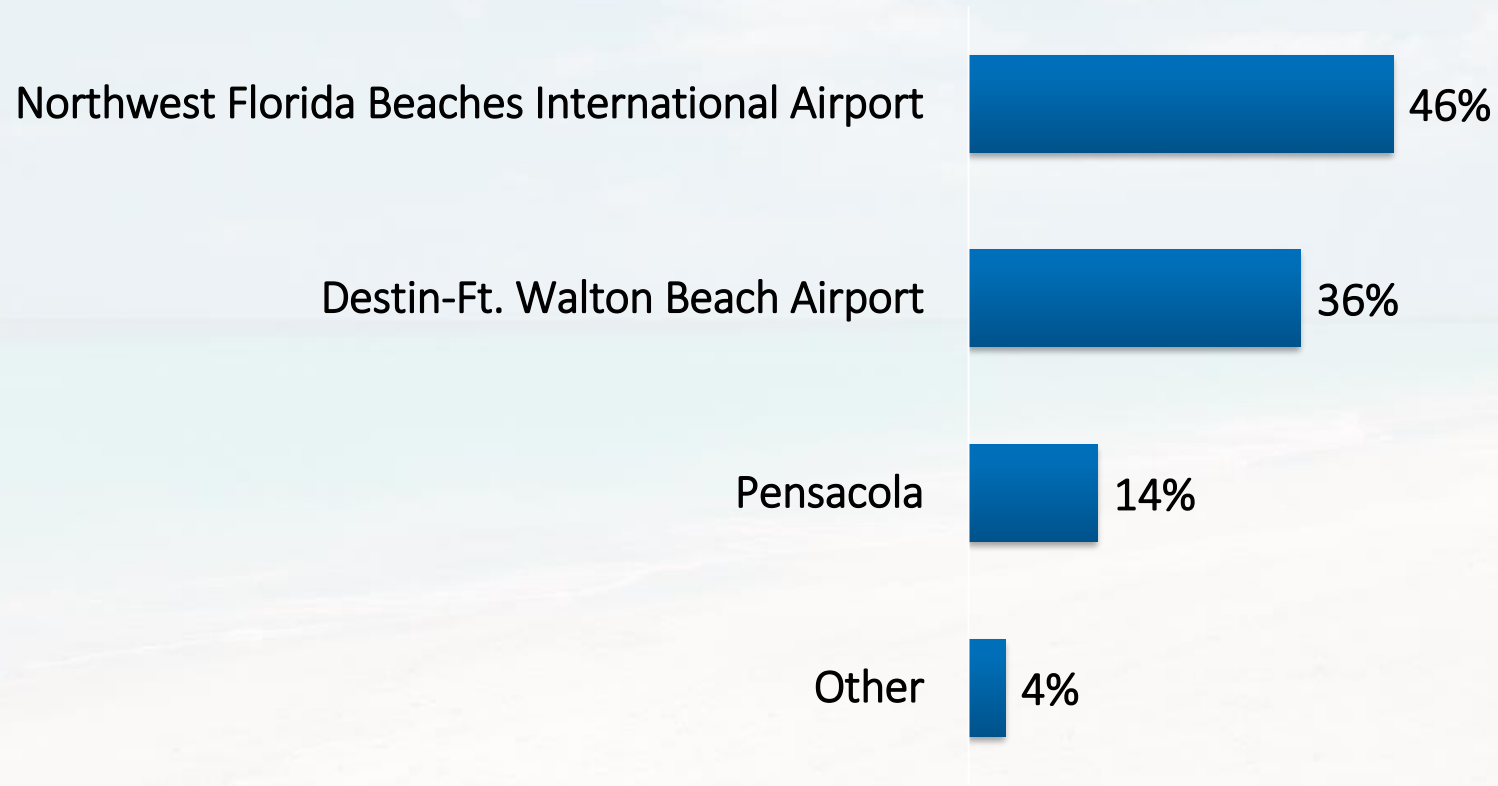
Origin of Fall Visitors

- 86% of Fall visitors live in 15 states

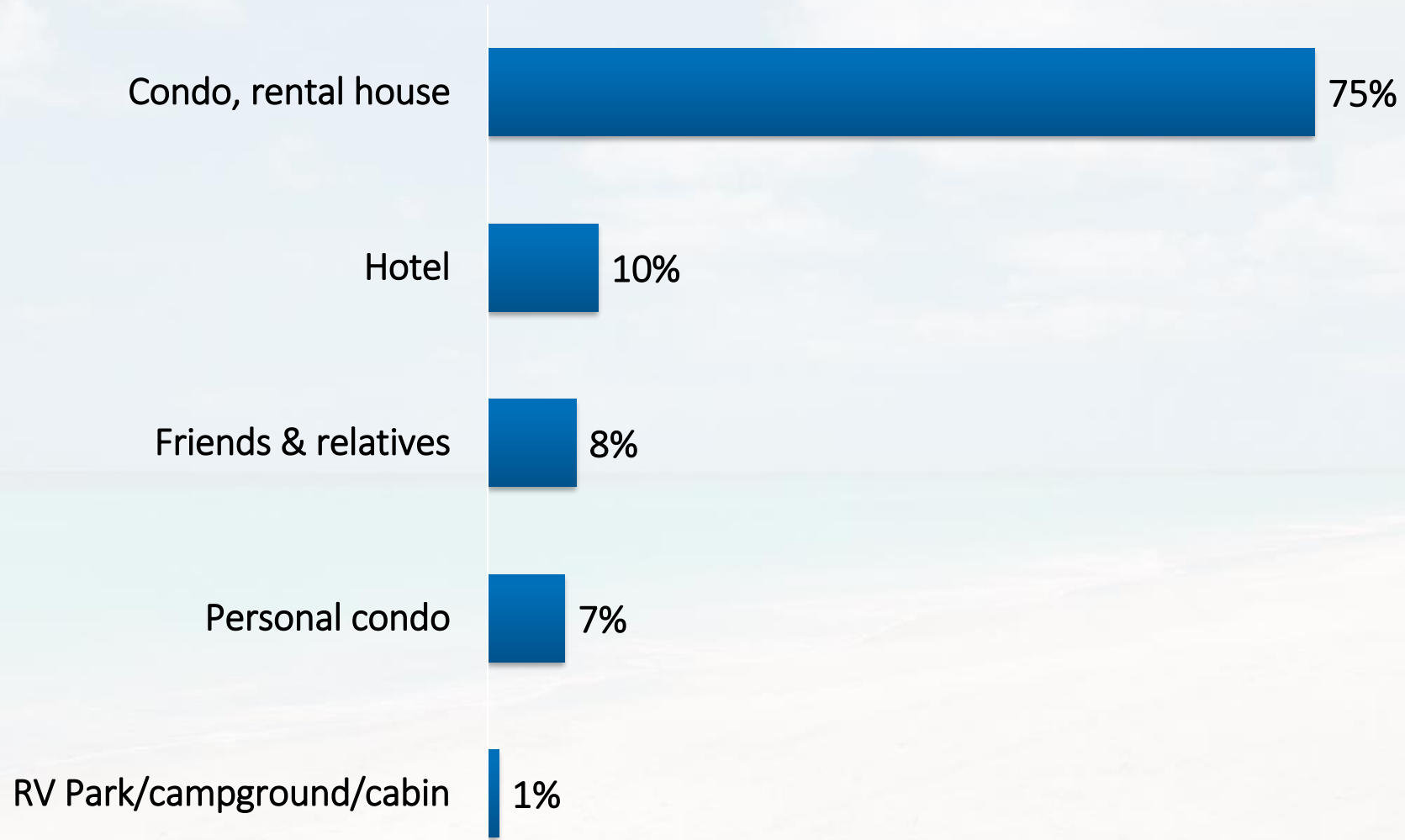
Georgia	14%
Alabama	14%
Tennessee	13%
Florida	11%
Texas	6%
Kentucky	5%
Louisiana	4%
Mississippi	3%
Arkansas	3%
North Carolina	3%
South Carolina	2%
Indiana	2%
Ohio	2%
Missouri	2%
Oklahoma	2%

South Walton Visitor Transportation

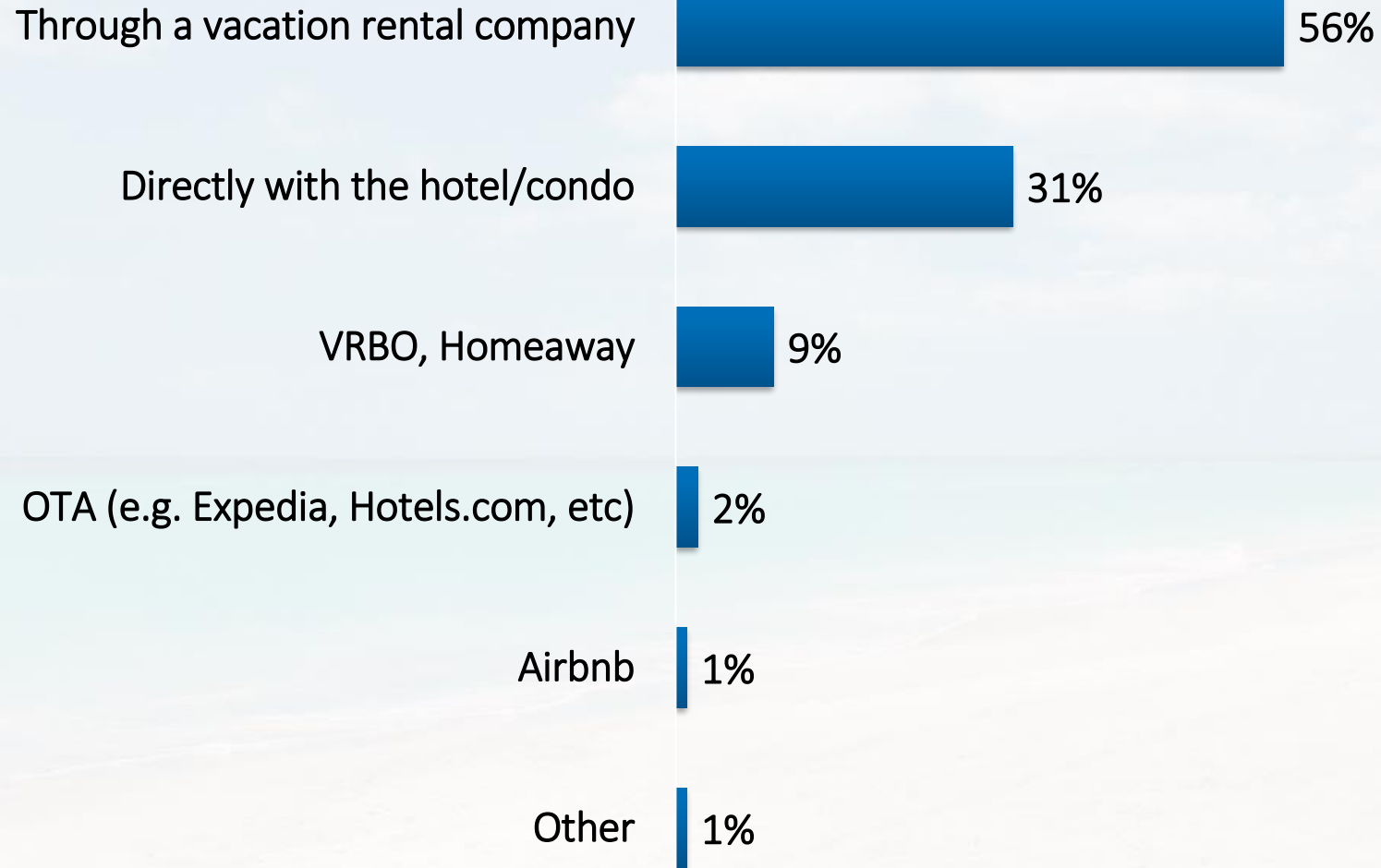
- **85%** of visitors **drove** to South Walton
- **26%** of those who drove were aware that there were direct flights from their city to the South Walton area
- **15%** who **flew** used the following airports:



Visitors' Accommodations

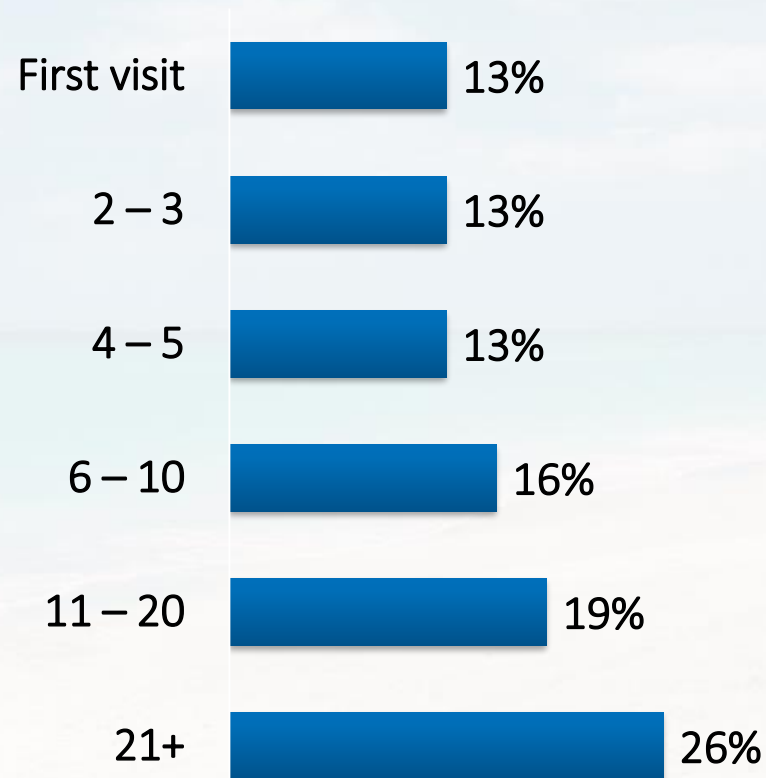


Booking Accommodations



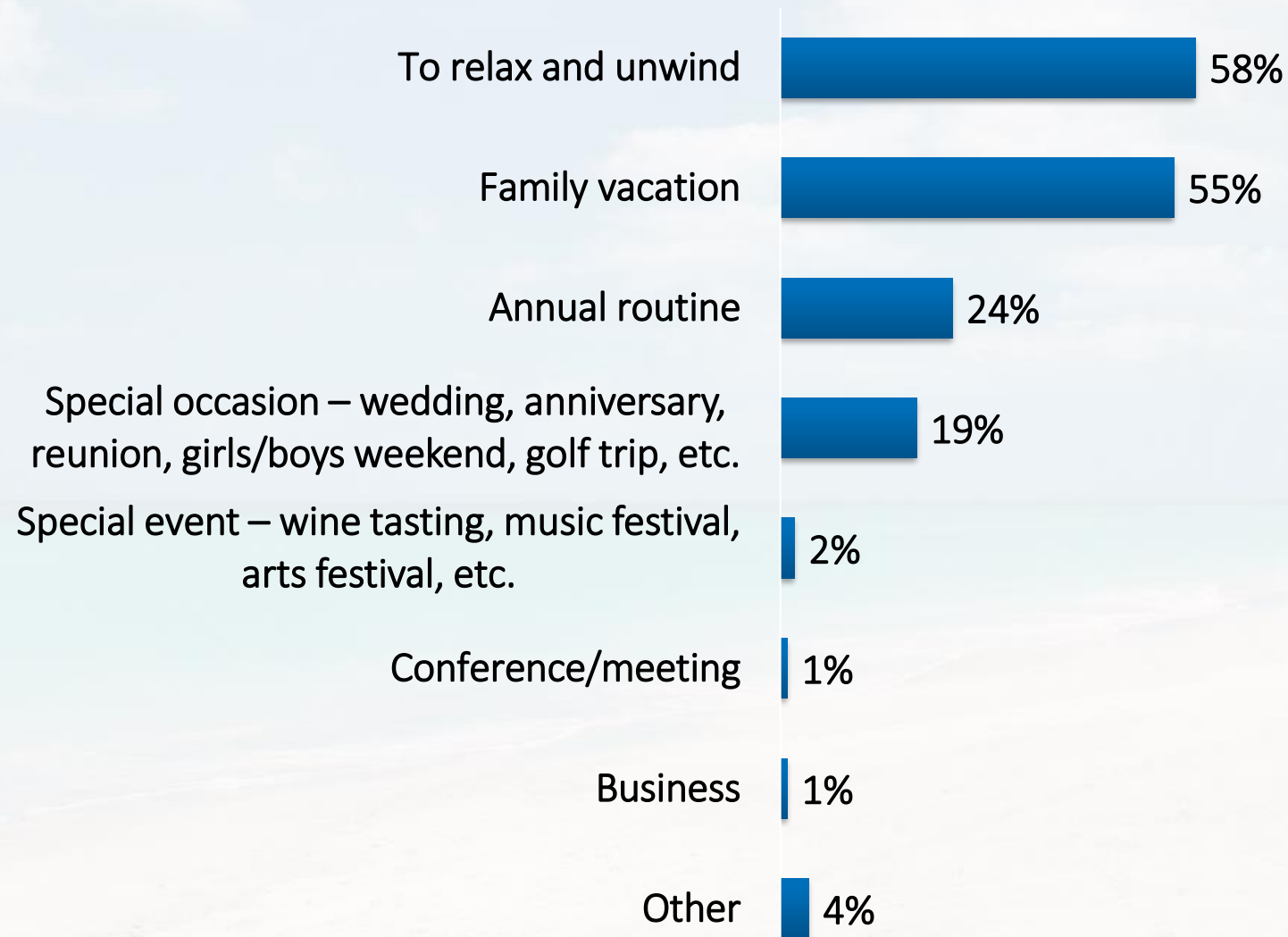
Typical South Walton visitor

- Spent **6.4 nights¹** in South Walton
- **13%** were **first time** visitors
- **45%** had visited more than 10 times



¹Visitors who stayed in paid accommodations up to 30 nights.

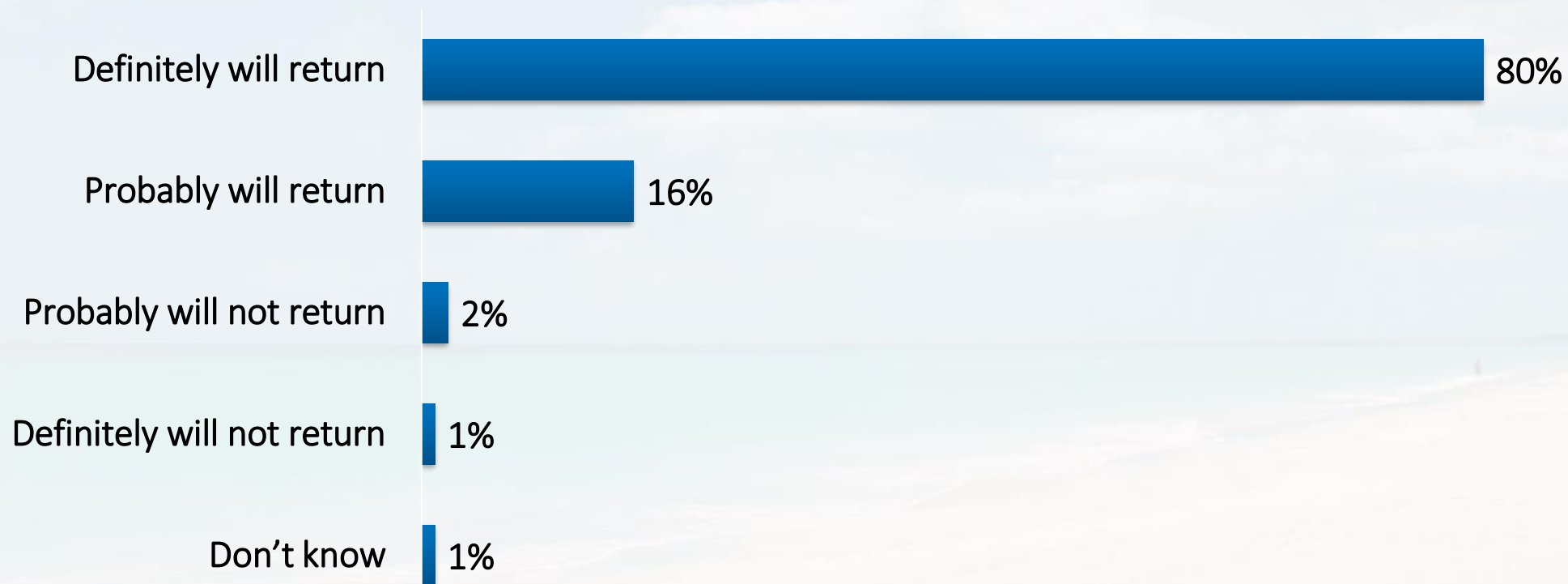
Reasons for visiting¹



¹Multiple responses permitted.

Satisfaction with South Walton

- Gave South Walton a rating of **9.1¹** as a place to vacation
- **96%** will return to South Walton²



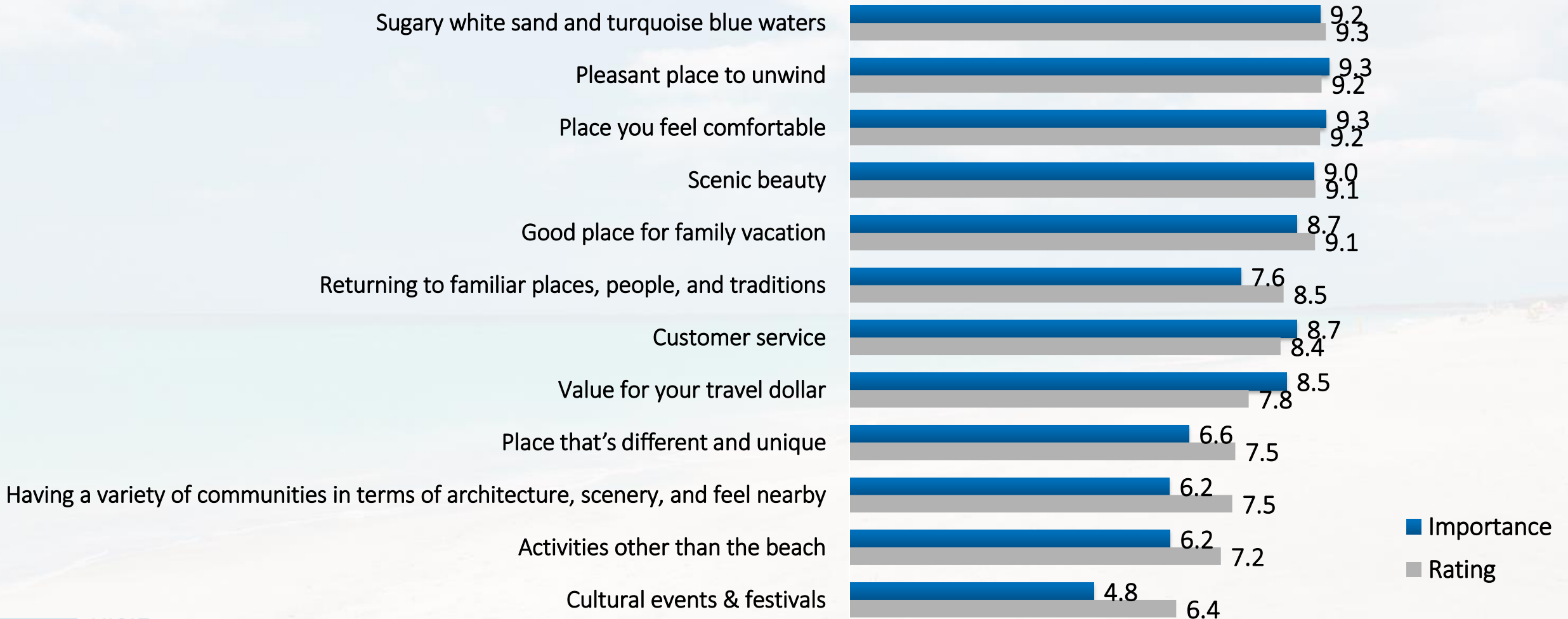
¹10 = Excellent; 1 = Poor

²About 3% of visitors will probably not return to South Walton because of the following reasons:

1. Poor customer service, 2. traffic was a problem, 3. too expensive, 4. prefer variety in vacation spots

South Walton Attributes: Gap Analysis

Importance of attributes when choosing destinations vs. **ratings** for South Walton



Typical South Walton travel party expenses

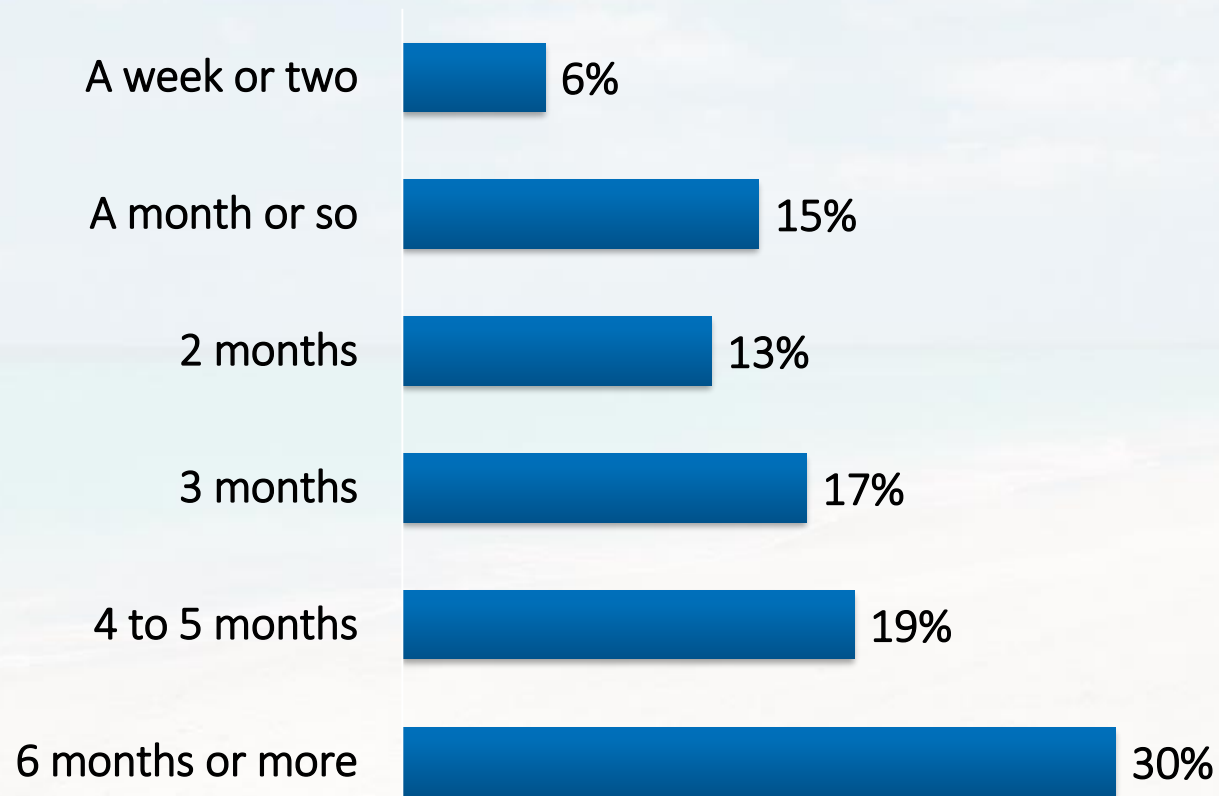
- Spent **\$674** a day
- Spent **\$4,313** on their trip: +5.3% compared to 2017.

	Average Daily Expenditure	Total Trip Expenditure
Accommodations	\$300 ¹	\$1,920
Restaurants	\$137	\$871
Groceries	\$49	\$317
Shopping	\$94	\$604
Entertainment	\$33	\$211
Transportation	\$39	\$251
Other	\$22	\$139
Total	\$674	\$4,313

¹This figure differs from the ADR reported by properties because of various fees added to the price visitors pay such as swim & tennis fees, amenity fees, housekeeping fees, reservation fees, arts & entertainment fees, linen charges, damage fees, etc.

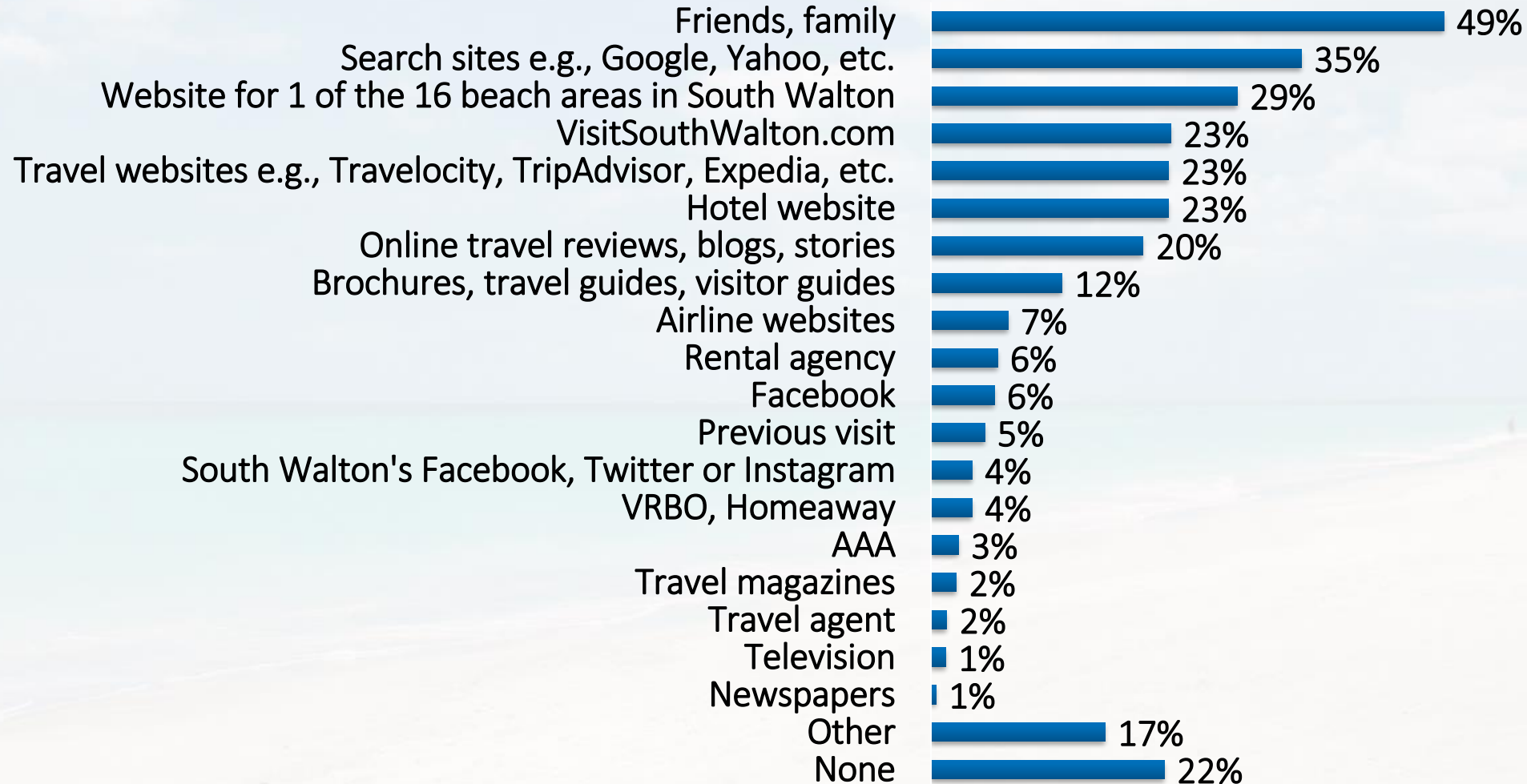
Planning cycle

- **3 in 10** visitors plans a Fall South Walton vacation 6 months out or more
- Relatively few visitors to South Walton have a short (a month or less) planning cycle



Planning sources

- Visitors use the following sources to plan their trips to South Walton¹:



¹Multiple responses permitted.

Typical South Walton visitor

- **21%** of visitors viewed a South Walton Visitors Guide before going to South Walton
 - 2% requested a print version
 - 19% viewed the online version
- Visitors Guide received a rating of **7.4 out of 10¹**

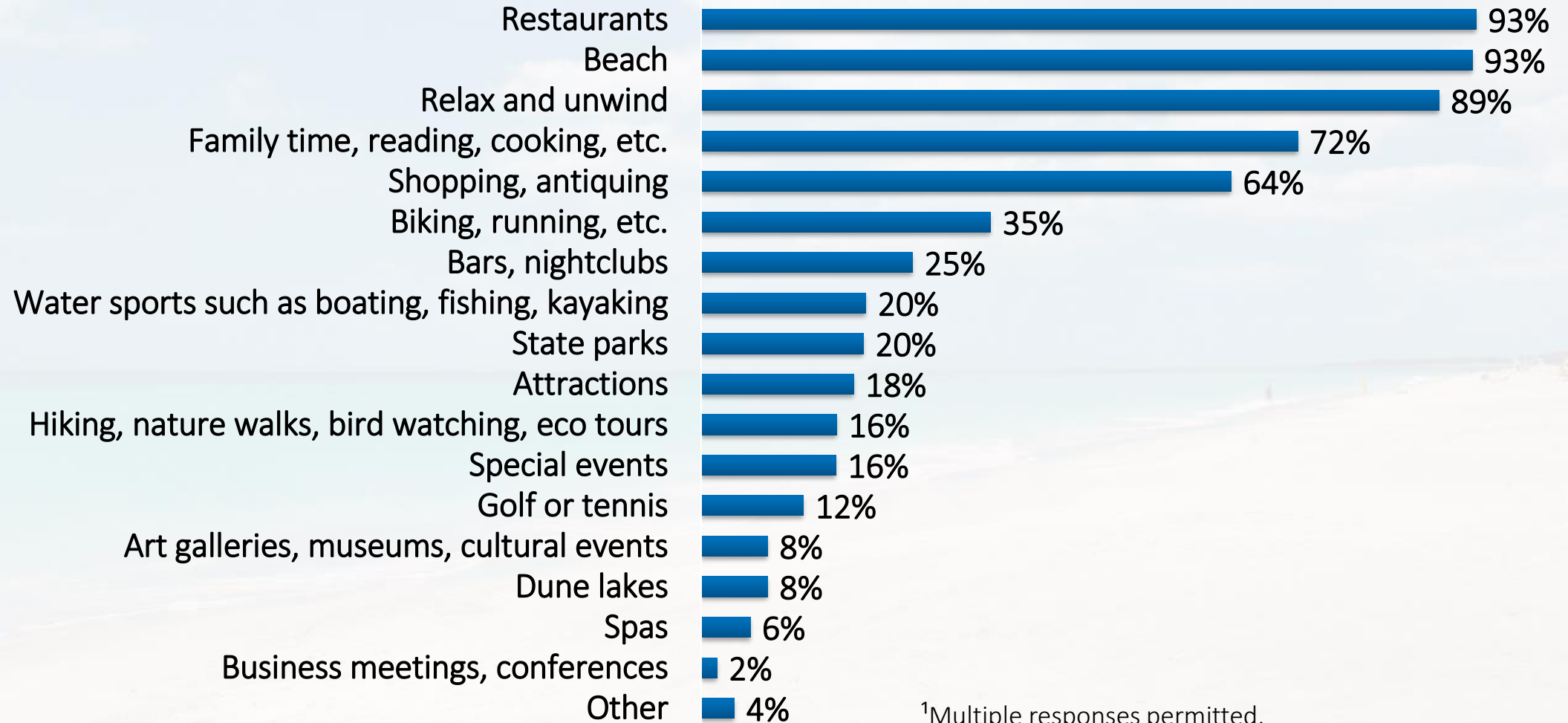
¹Rated on a 10 point scale where 10 is extremely useful and 1 is not at all useful.

Typical South Walton visitor

- **22%** - use the term “South Walton” when referring to the area
- When planning their trip to South Walton:
 - **56%** - considered going to only 1 of the 16 beach communities
 - **33%** - considered going to another South Walton beach community
 - **8%** - considered vacationing outside of South Walton
 - **4%** - considered going to a beach destination outside of Florida

Activities in market

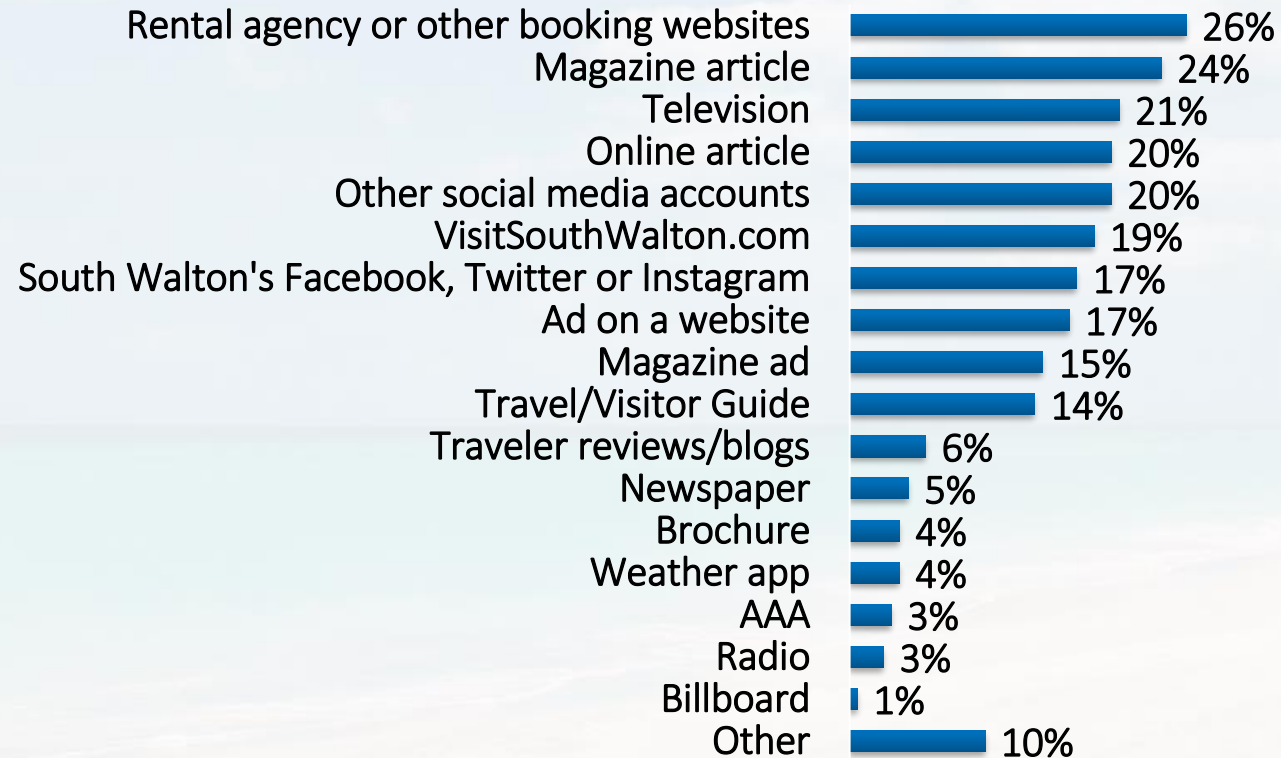
- Visitors engaged in the following activities on their last trip to South Walton¹:



¹Multiple responses permitted.

South Walton Promotions

- **27%** of Fall visitors have recently seen, read or heard advertising, promotions or travel stories about South Walton on the following¹:

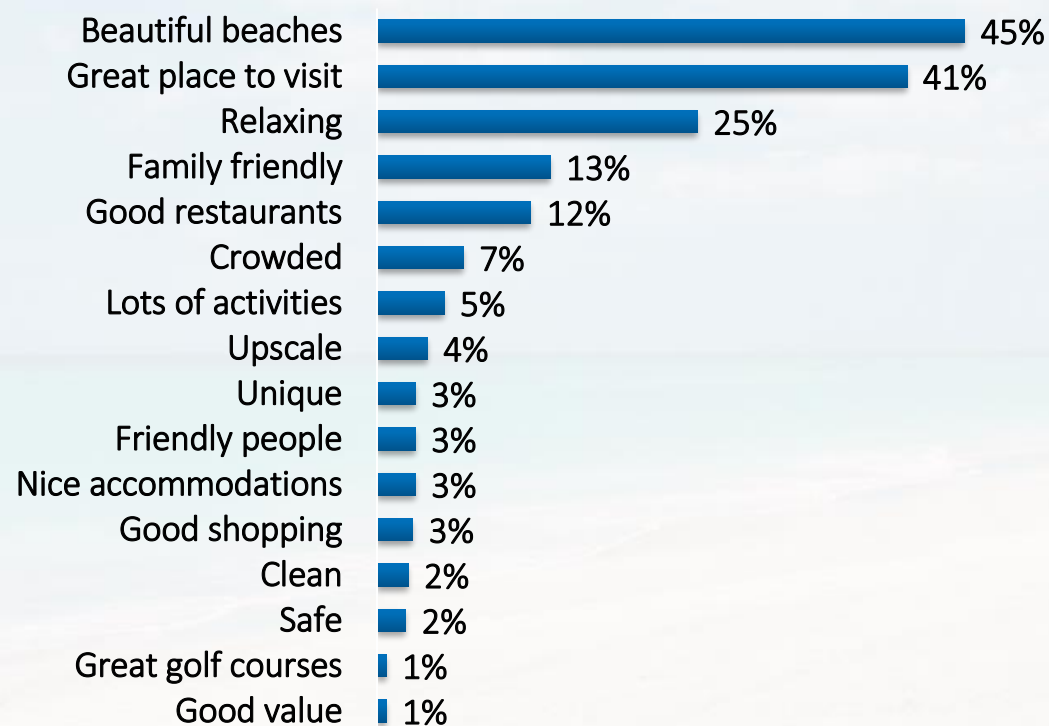


→ This information influenced **8%** of visitors to visit South Walton

¹Multiple responses permitted.

Perceptions of South Walton

- Fall visitors describe South Walton as having **beautiful beaches** and being **family friendly**.¹



¹Coded verbatim response; multiple responses permitted.

Emotions associated with South Walton

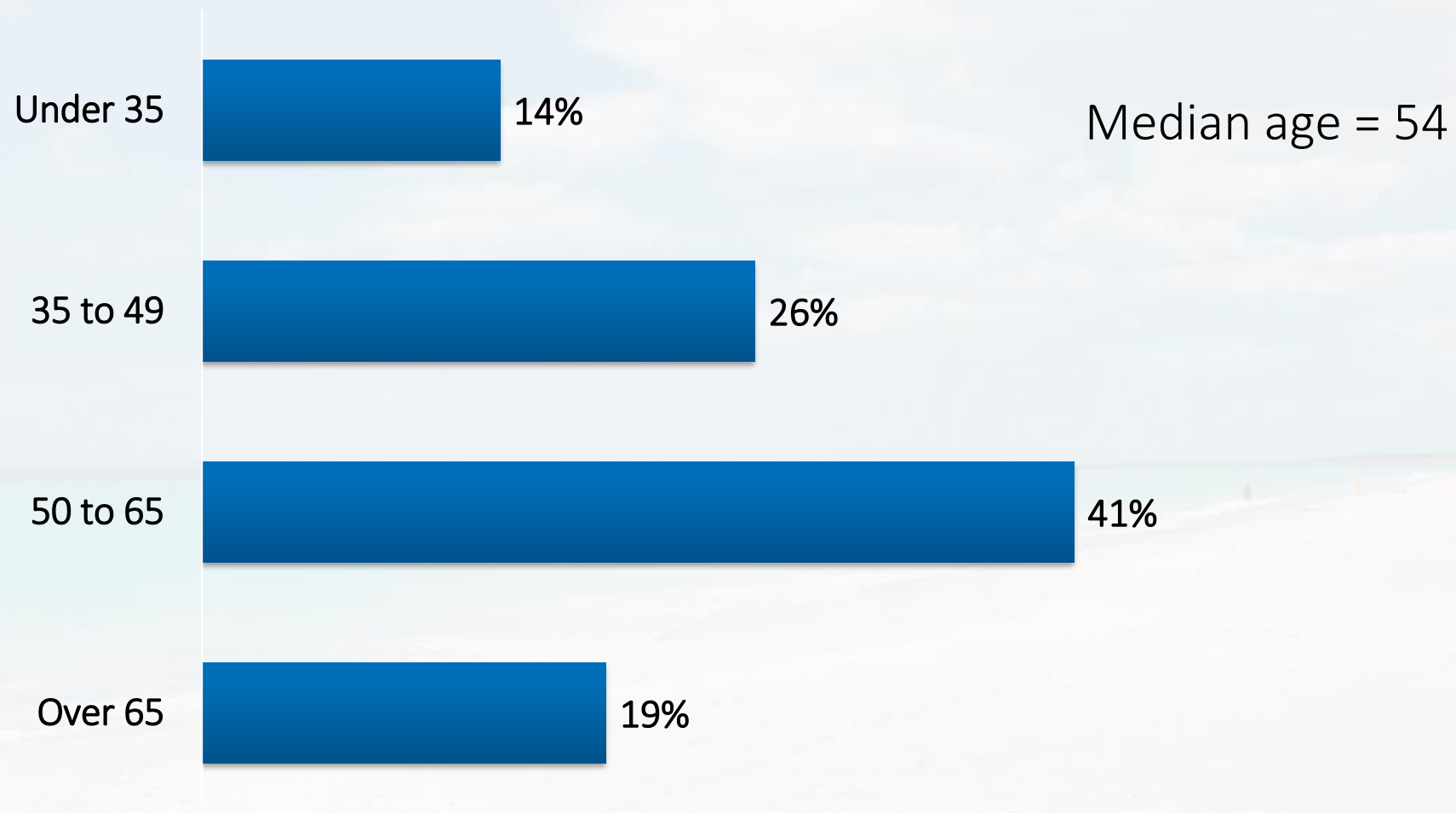
- Fall visitors describe the following feelings or emotions they get when visiting South Walton that they don't get when visiting other beach destinations.¹



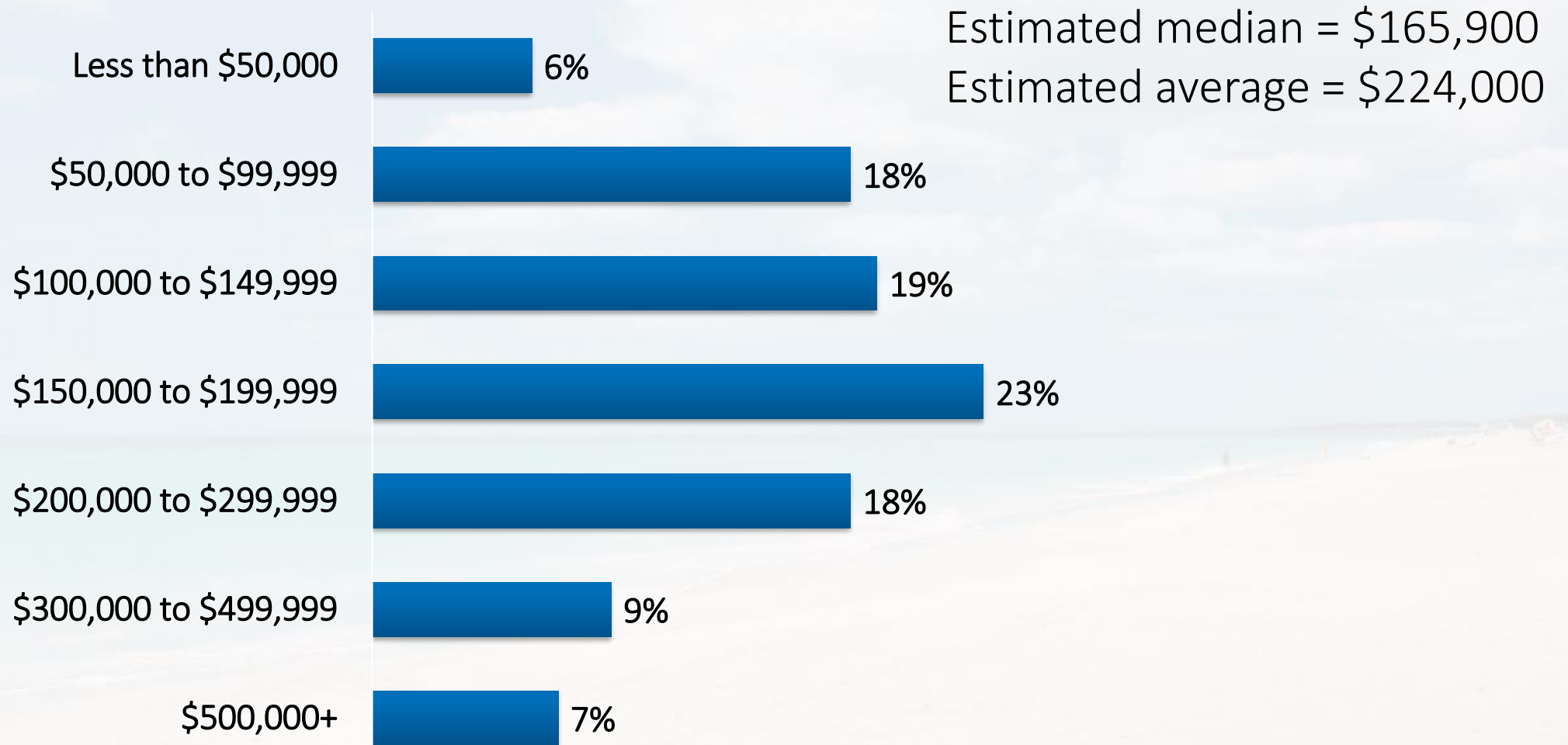
¹Coded verbatim response; multiple responses permitted.

*13 comments about the negative impact of the new customary use law.

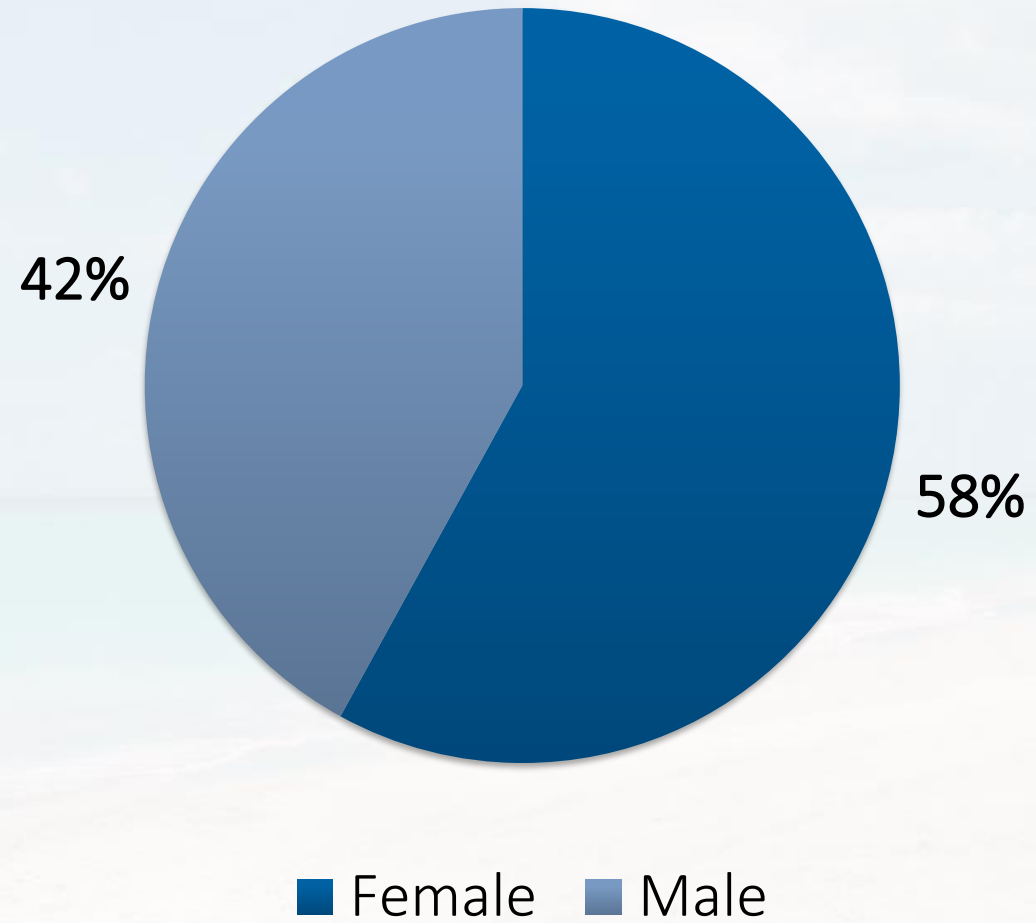
Age of Fall Visitors



Total household income in 2017



Gender





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