



QUARTERLY PARTNER MARKETING MEETING

JANUARY 2025

PREVIOUS SEASONS IN REVIEW

2023 and 2024 Overview

General softening of booking from pandemic years, normalization with 2019 numbers.

Return of European travel over the last two summers, inflation, and economic hardship impacted some travelers.

The market supply has increased by over 5,500 units since 2019 – supply vs demand.

Direct spending is up compared to where it would have been if pre-pandemic trends had continued.

Visitor rating and likelihood to return have increased slightly in the last two years.

Booking trends have shifted since the pandemic to shorter booking windows, relaxed policies, etc.

TOURISM TRENDS 2025

Florida Tourism

Late 2021 & 2022: Revenge Travel

2023 & 2024: Normalization

2025 Outlook

- US GDP forecasted to grow 1.9% (Convera)
- Optimistic for slight growth in tourism (Phocuswright)
- 4 in 5 plan on taking a vacation this year, up 7% (MMGY)
- But, more than half plan on spending less per trip (Booking.com)
- Consumers continue to spend more on experiences than things (US Dept. of Commerce)

TOURISM TRENDS 2025

Trip Planning & Marketing

- The most relied-upon resources remain recommendations from friends and family (58%), general search (51%), and online travel agencies (OTAs) (41%). (Phocuswright)
- Email has re-emerged as the most effective way to build brand awareness and simultaneously track engagement back to bookings. (Skift & Curacity)
- 94% increase in traveler's preferences to learn about new destinations. (Future Partners)
- More than half of respondents said that they had been influenced "somewhat" or "a great deal" by influencers, compared to 41% by celebrities. (MMGY)
- Facebook, Instagram, and YouTube are the most used social media for trip planning. (Phocuswright)

TOURISM TRENDS 2025

Family Travel

- 70% of global travelers who travel with their children pick the vacation destination based on kids' needs and interests. (Hilton)
- 73% of global travelers often seek out authentic, local experiences when traveling with children. (Hilton)
- 56% of families will choose hotels based on their kids' club or youth programming. (Hilton)
- Searches for pet-friendly hotel options doubled year-over-year, ranking among the top 10 most used search filter terms and is also the fourth highest in search-to-stay conversion. (Hilton)
- Rise in multigenerational SKI (Spending Kids' Inheritance) trip
 - 49% of baby boomer respondents would rather spend money on a trip of a lifetime in 2025 than leave an inheritance to their children. (Booking.com)

TOURISM TRENDS 2025

Culinary Travel

- 50% of travelers book restaurants before flights. (Recommend.com)
- Nearly 1 in 5 will travel specifically to seek out new restaurants or culinary experiences. (Hilton)
- 60% of luxury travelers prioritize staying at hotels with great restaurants. (Hilton)

TOURISM TRENDS 2025

Wellness Travel

- About 22% of travelers surveyed plan to get away soon for self-discovery or mental health rather than for family outings, business, or other more traditional purposes. Many people share visuals of these trips on social media, and refer to the vacations as “soft travel,” Hilton’s report said. (Hilton)
- Americans spent \$425B on wellness-related travel in 2024 (Skift)
- Wellness tourism is experiencing remarkable growth, with an annual increase of 16.6 percent. (Global Wellness Institute)
- 62% of American travelers say they feel more mindful about their overall health and wellbeing than ever before. (Skyscanner)

TOURISM TRENDS 2025

Luxury Travel

- 89% of luxury travelers are more likely to book a luxury hotel if they're already familiar with the brand. (Skift & Curacity)
- Luxury travelers prioritize recommendations from travel media as the most reliable source for brand reputation, quality, and value when making decisions on where to stay. (Skift & Curacity)
- By the end of 2025, Millennials and Gen Z will make up 45% of luxury sales. (IGES)
- Cooler destinations are among the most popular once again.
 - Seventy-six percent of luxury travel advisors say clients now favor destinations with more moderate weather. (Virtuoso)



QUESTIONS?

Downs & St. Germain Research
Contact@dsg-research.com
(850)-906-3111

2025 OUTLOOK

ADR and Occupancy January - September

January – March ADR and occupancy are trending down

April – June ADR and occupancy are trending up

- Spring Break falls in April in 2025 vs March in 2024

July – September ADR and occupancy are trending down slightly

2025 OUTLOOK

Market Visitation vs Market Spend

State Visitation

Geo Data Compare Dates

State	Share of Visitor Days	Change in Share of Visitor Days
Georgia	13.45%	- 0.4
Alabama	12.22%	- 0.3
Texas	11.28%	- 0.3
Tennessee	10.39%	+ 1.3
Florida	7.23%	+ 0.2
Louisiana	5.83%	- 0.5
Mississippi	4.54%	- 0.4
Kentucky	4.07%	+ 0.2
Missouri	3.85%	+ 0.1
Ohio	3.73%	- 0.1
Arkansas	3.47%	- 0.3
Illinois	2.99%	- 0.0

Spending by State

Spend Data

State	Share of Spending for 9/23 - 8/24
Texas	13.9%
Alabama	10.7%
Tennessee	9.49%
Georgia	9.16%
Florida	8.81%
Louisiana	5.36%
Mississippi	4.87%
Ohio	3.93%
Kentucky	3.81%
Missouri	3.42%
Indiana	3.27%
Arkansas	3.17%
Illinois	3.12%
North Carolina	2%

2025 OUTLOOK

Market Visitation vs Market Spend

City Visitation

[Geo Data](#) [Compare Dates](#)

City	Share of Visitor Days	Change in Share of Visitor Days
Birmingham, AL	1.59%	- 0.5
Atlanta, GA	1.2%	- 0.2
Tallahassee, FL	0.91%	- 0.2
Houston, TX	0.73%	- 0.3
Louisville, KY	0.73%	- 0.2
Nashville, TN	0.72%	- 0.1
Pensacola, FL	0.68%	- 0.2
Knoxville, TN	0.67%	- 0.1
Alpharetta, GA	0.65%	- 0.2
Baton Rouge, LA	0.64%	- 0.2
Dallas, TX	0.62%	- 0.2
Marietta, GA	0.61%	- 0.2

Spending by City

[Spend Data](#)

City	Share of Spending for 9/23 - 8/24
Dallas, TX	1.78%
Birmingham, AL	1.57%
Pensacola, FL	1.37%
Nashville, TN	1.16%
Tallahassee, FL	1.05%
Atlanta, GA	1.03%
Louisville, KY	0.94%
Dothan, AL	0.93%
Houston, TX	0.89%
Franklin, TN	0.75%
Fort Worth, TX	0.73%
Baton Rouge, LA	0.69%
Cincinnati, OH	0.58%
Memphis, TN	0.57%

Spending Impact by DMA

[Spend Data](#)

DMA	vs Avg Spend per Transaction	Share of Spending
Dallas-Ft. Worth	1.5x	7.63%
Atlanta	1.1x	6.91%
Nashville	1.3x	5.48%
Mobile-Pensacola -Ft Walt	0.9x	3.62%
Birmingham -Ann and Tusc	1.2x	3.41%
Memphis	1.3x	2.71%
Houston	1.3x	2.5%
New Orleans	1.2x	2.5%
St. Louis	1.3x	1.94%
Dothan	1x	1.78%
Louisville	1.2x	1.69%
Cincinnati	1.2x	1.67%
Chicago	1.4x	1.67%
Indianapolis	1.2x	1.64%



WHAT ARE YOU SEEING?

UPCOMING OPPORTUNITIES

Wheel the World

Integrated solution to help destinations evaluate, enhance, and promote accessibility, ensuring they are fully prepared to welcome all travelers.

Wheel the World sends a trained mapper to gather accessibility information with the WTW Accessibility Mapping System.

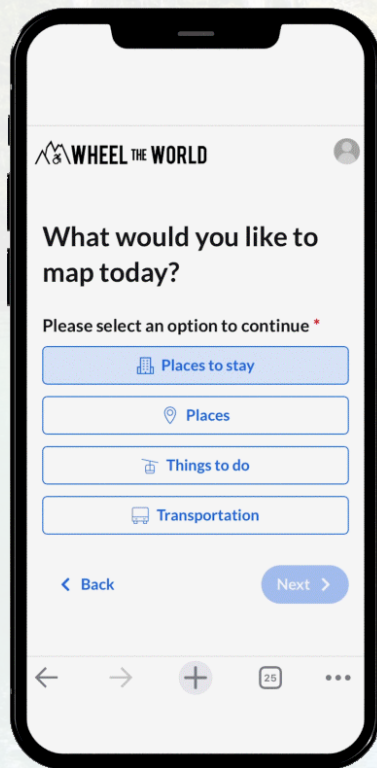
Wheel the World then transforms the accessibility information into bookable destination listings on their website.

Once information is gathered, Walton County will receive a Destination Verified seal and each participating partner will receive an Accessibility Verified seal.

Partners also receive access to training and resources for future accessibility enhancements.

UPCOMING OPPORTUNITIES

Wheel the World



Accessible rooms

Single King

1 Bed - 2 guests - Ensuite bathroom

Guaranteed accessibility features

- ✓ Roll-in shower
- ✗ Free turning space
- ✓ Smooth flooring
- ✓ Toilet grab bars

[See all features](#)

Set up your cancellation policy
More details on all policy options ⓘ

Some policies may have breakfast or extras available.

- Non-refundable + \$0
- Fully refundable before Feb 11 + \$16
- Fully refundable before Feb 15 + \$19

Extras

- No extras + \$0
- Breakfast + \$16


\$120 USD / Night
Total \$480 USD / 4 Nights
+ \$45 USD taxes ⓘ

[Book this room](#)

For Partners

Accessibility Verified
wheel the world

Scan to book hotels and experiences with all the accessibility details you need.



QR code redirects to the DMO landing page.



UPCOMING OPPORTUNITIES

Annual Co-Op Sales

FY2026 Media Plan in development

Sales period = May 5 – May 9



[SIGN IN](#) [SIGN UP](#)

Welcome To
**THE FULL
WALTON
COUNTY
TOURISM CO-
OP EXPERIENCE**

Welcome to the Walton County Tourism Department's Co-Op Program. We are pleased to offer a fully digital sales process that allows you to purchase flexible flight opportunities and customized creative during the annual program time period, as well as throughout the year.

[SIGN UP](#)





QUESTIONS?

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