

# PENSACOLA RESIDENT OPINION STUDY

July 2022  
Downs & St. Germain Research



# Introduction

## Objectives:

- » To understand Escambia County residents' perceptions of tourism in Pensacola, Pensacola Beach, and Perdido Key
- » To identify what residents think makes Pensacola a good place to visit, and what could make it better
- » To determine residents' perceptions of the administration of tourism development in Escambia County, including their understanding of Visit Pensacola

This insight can be used to demonstrate the support for tourism in the community and adapt communications to bolster that support

## Methodology:

- » A survey of 469 residents of Escambia County was conducted online during the month of June 2022.



# KEY TAKEAWAYS



# Key Takeaways

#1) Escambia County residents believe tourism is a positive force in the community

- The positive perceptions of the net impact of tourism to the area outnumber the negative ones by a margin of greater than 7 to 1
- Nearly all residents who are aware of Visit Pensacola support their efforts
- Nearly 3 in 4 residents agree tourism raises the profile and image of Escambia County



# Key Takeaways

#2) According to residents, tourism in Escambia County is connected to the economic development of the area

- By a significant margin, residents are more likely than not to recognize the economic benefits of tourism
- 1 in 8 Escambia County residents visited the area before deciding to move to the county



# Key Takeaways

## #3) There is progress to be made in terms of community outreach

- Fewer than 3 in 10 Pensacola area residents purport to know the source of Visit Pensacola's funding
- Fewer than 2 in 5 residents feel that they are offered an opportunity to be involved with tourism planning and development



# Key Takeaways

#4) Similar to visitors' perceptions, residents view the beach as a vital part of the Pensacola area experience

- Nearly 2 in 3 residents mention that the beach makes the area unique
  - The beach was mentioned 4 times more than any other factor
- Beach renourishment was one of the top recommendations from residents for making the area a better place to live

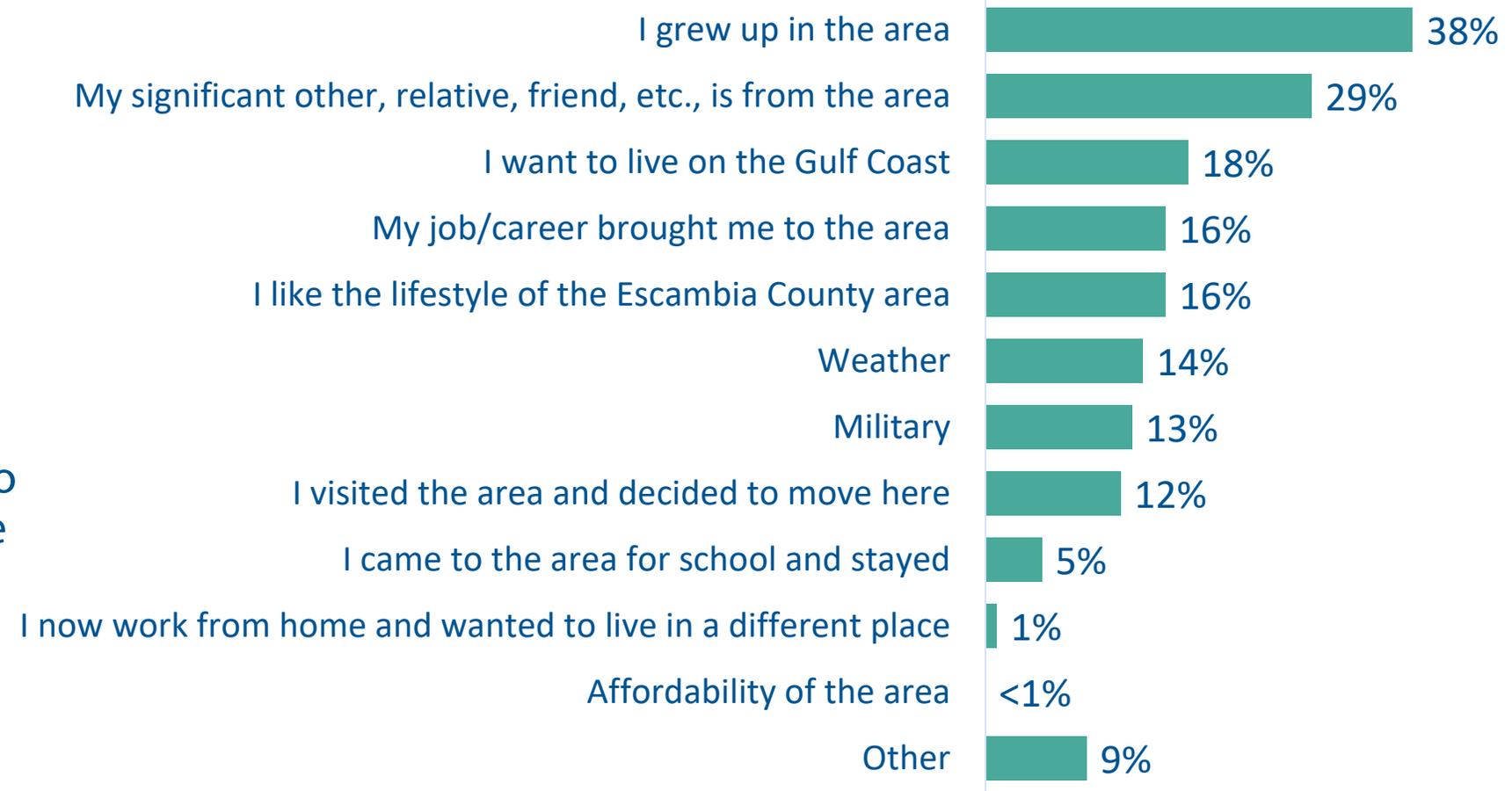


# DETAILED FINDINGS



# Reason for Living in Escambia County<sup>1</sup>

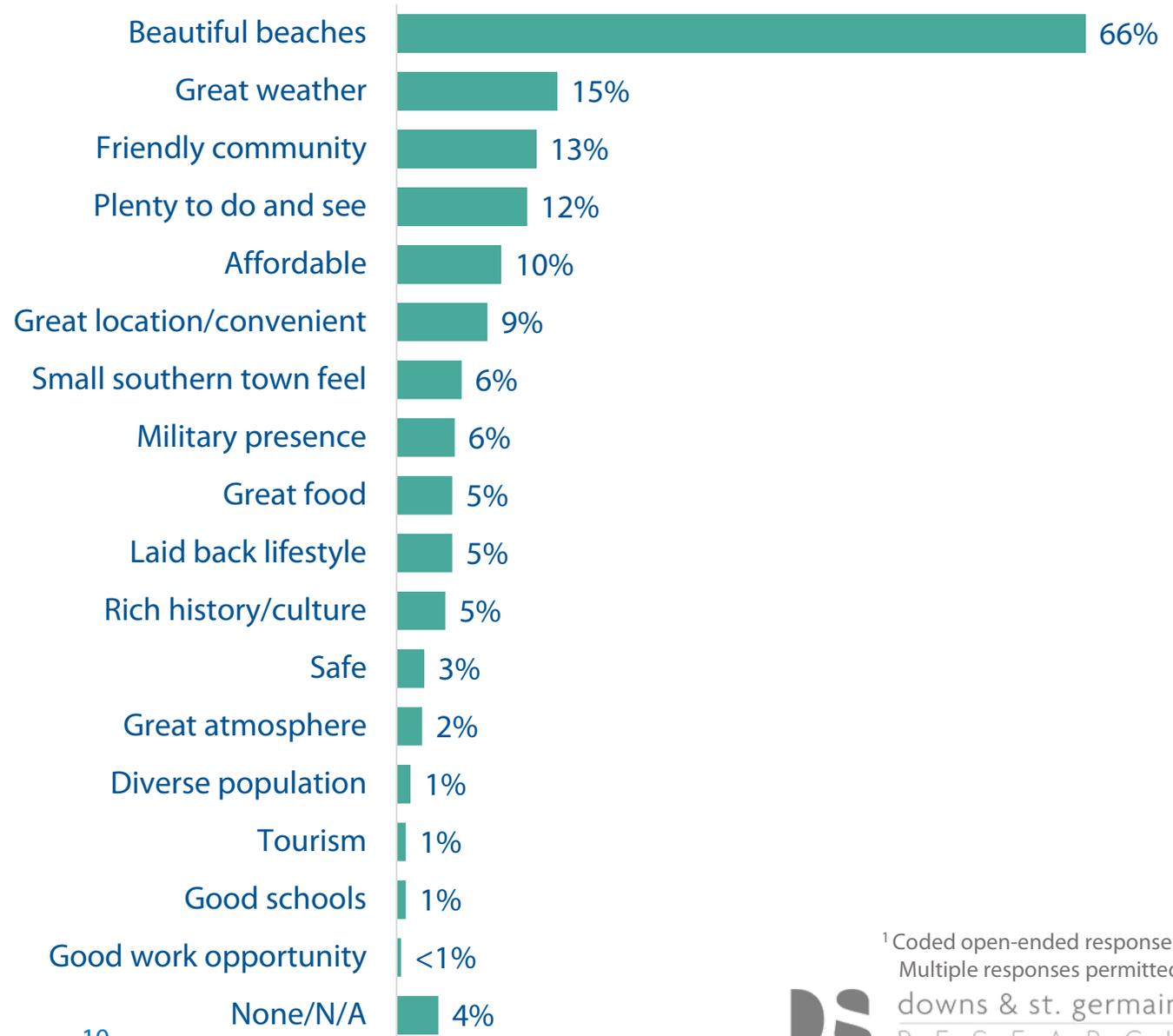
- » A plurality of residents (38%) grew up in the area
- » Including the military, 3 in 10 residents (29%) came to Escambia County for a job
- » 3 in 10 (29%) residents came to join a spouse, friend or relative



<sup>1</sup> Multiple responses permitted

# Unique Attributes of Escambia County<sup>1</sup>

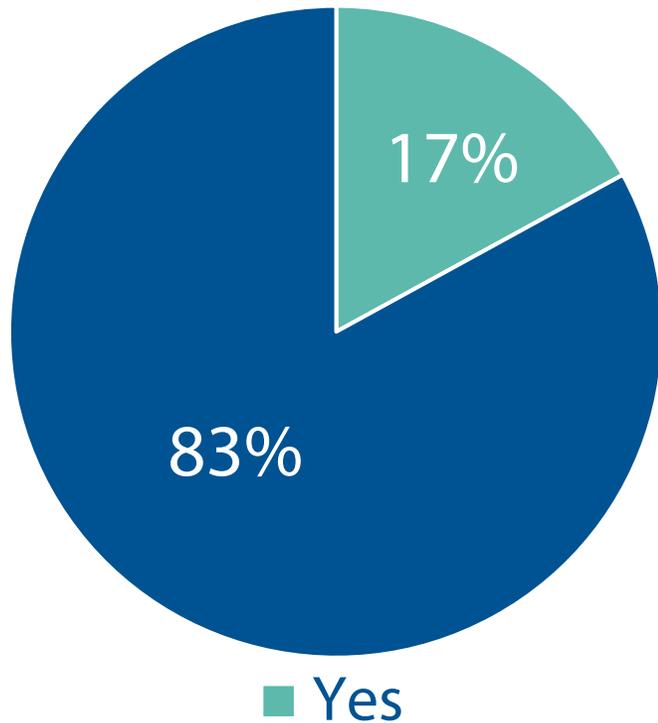
- » Residents think the area's beautiful beaches make Escambia County a desirable place to live
- » Over **1 in 10** residents also think of these as Pensacola's unique attributes:
  - » **Great weather**
  - » **Friendly Community**
  - » **Plenty to do and see**



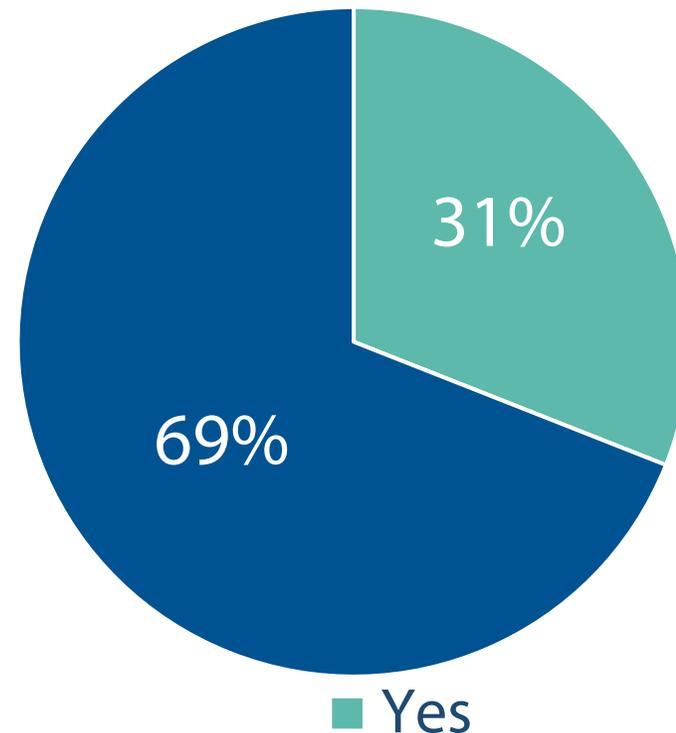
# Tourism Connection

- 1 in 6 Escambia County residents works for or has a family member who works with hotels, vacation rental agencies, or other types of accommodations in Escambia County
- Over 3 in 10 residents work in or have a family member who works in businesses heavily influenced by tourism in Escambia County

Works with Accommodations

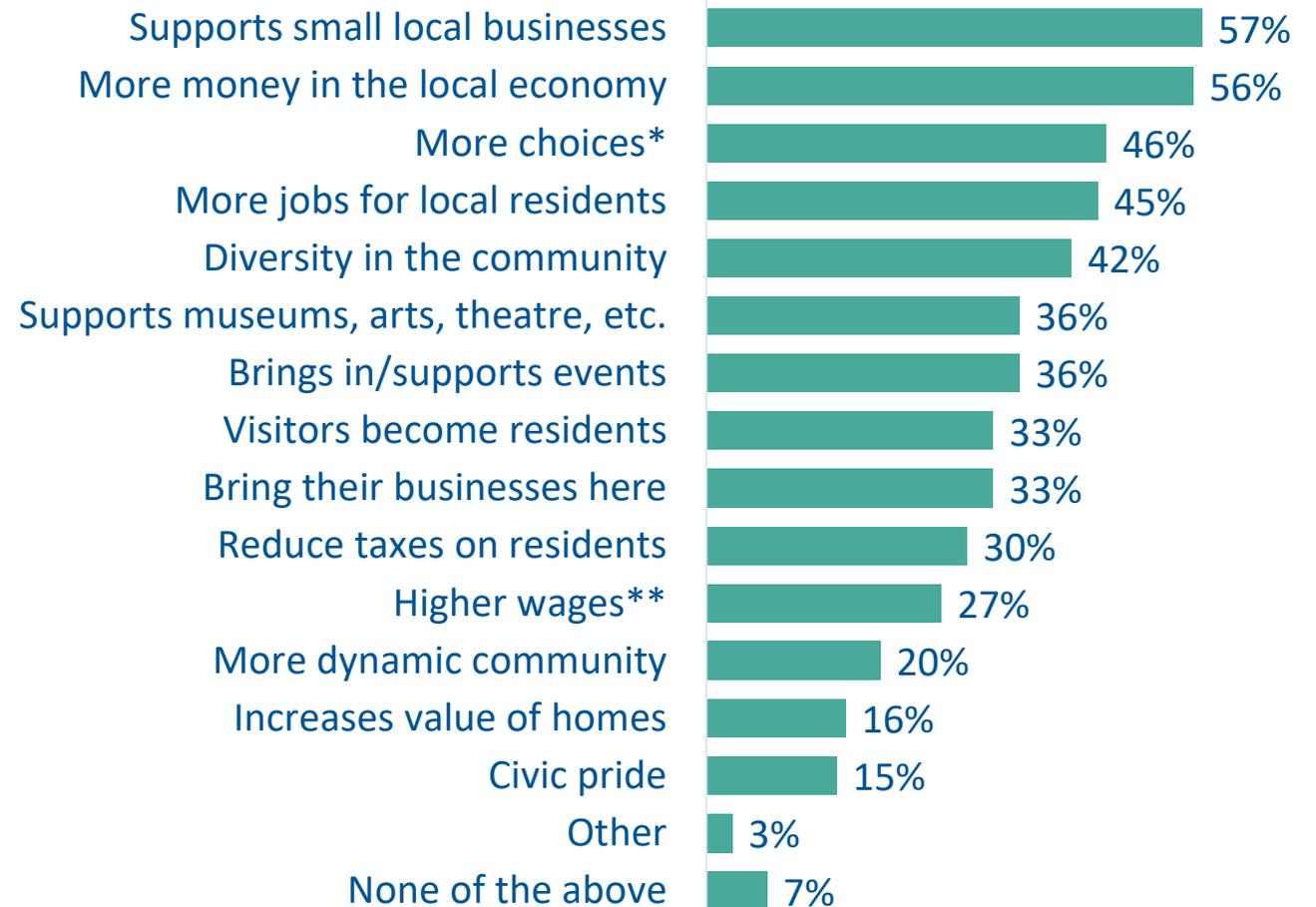


Works in Retail or Service



# Positive Impacts of Tourism<sup>1</sup> (Aided)

- » Escambia County residents are more likely to recognize the economic benefits of tourism
- » Nearly 3 in 5 agree tourism supports small businesses & puts more money into the local economy
- » Nearly half of residents agree tourism provides more local jobs & retail, service, and cultural options



<sup>1</sup> Multiple responses permitted

\*More choices in restaurants, shopping, cultural options, etc.

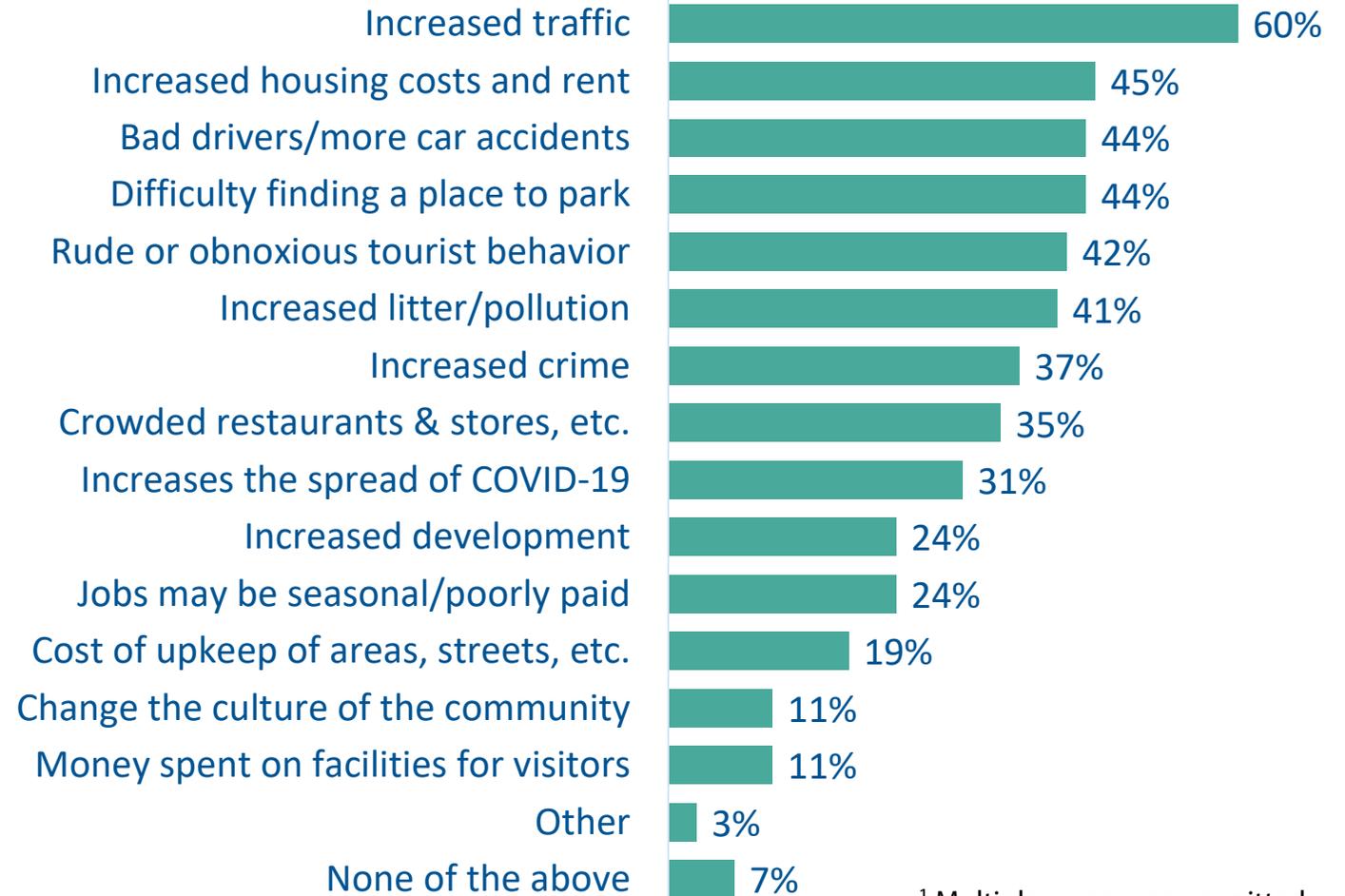
\*\*Wages for employees of businesses that serve visitors.

# Positive Impacts of Tourism (Comments)<sup>1</sup>



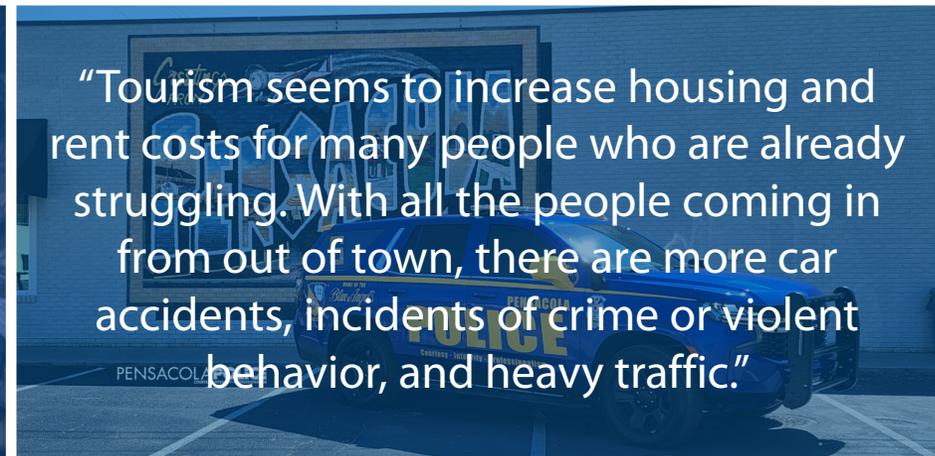
# Negative Impacts of Tourism<sup>1</sup> (Aided)

- » Traffic and parking problems are expressed in 3 of the top 4 negative impacts of tourism
- » Visitors driving up housing costs is the second biggest concern with tourism
- » Having new and more people around, e.g., rude behavior, increased litter, increased crime, crowded stores, and increased spread of COVID comprise other key negatives
- » For the most part, residents do not see tourism changing the culture of the Pensacola area negatively



<sup>1</sup> Multiple responses permitted

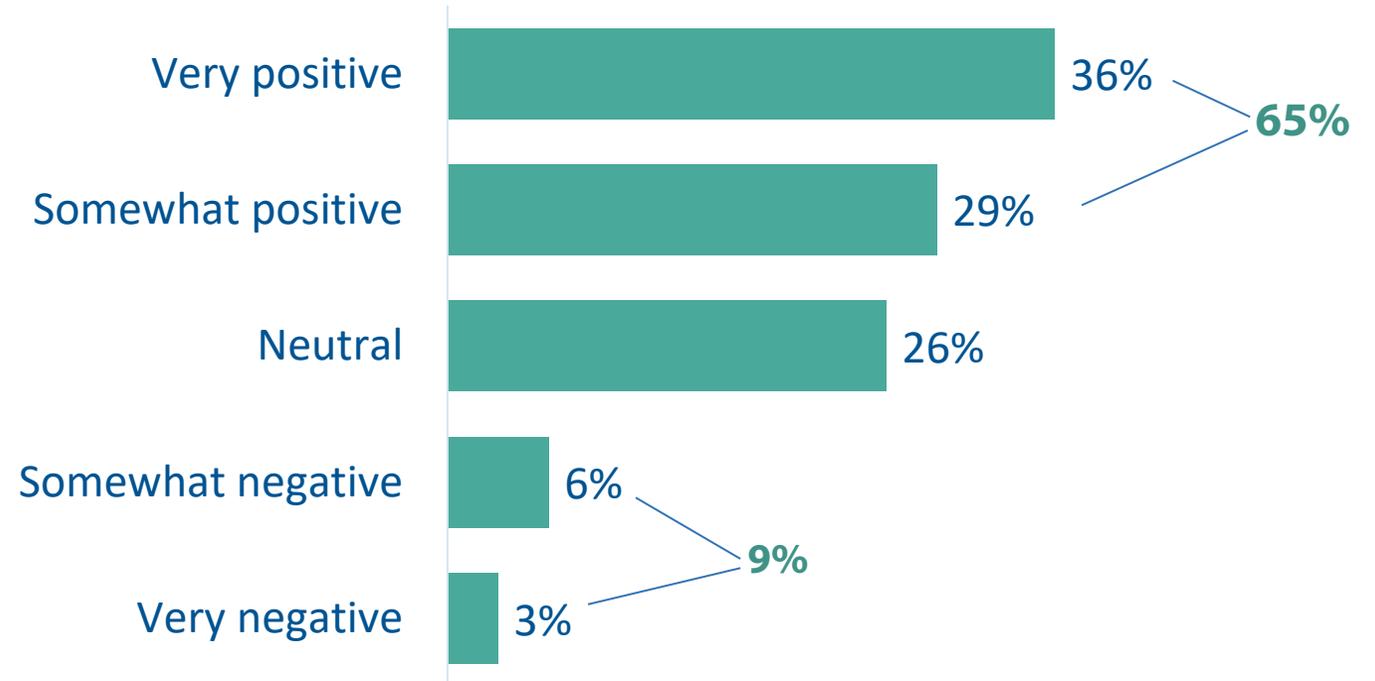
# Negative Impacts of Tourism (Comments)



# Net Impact of Tourism

## Overall View of Tourism

- » Despite residents' willingness to cite problems associated with tourism, they agree that the net impact of tourism is very positive, in fact, positive perceptions outnumber negative ones by a margin of greater than 7 to 1
- » Fewer than 1 in 10 Escambia County residents has a negative overall view of tourism



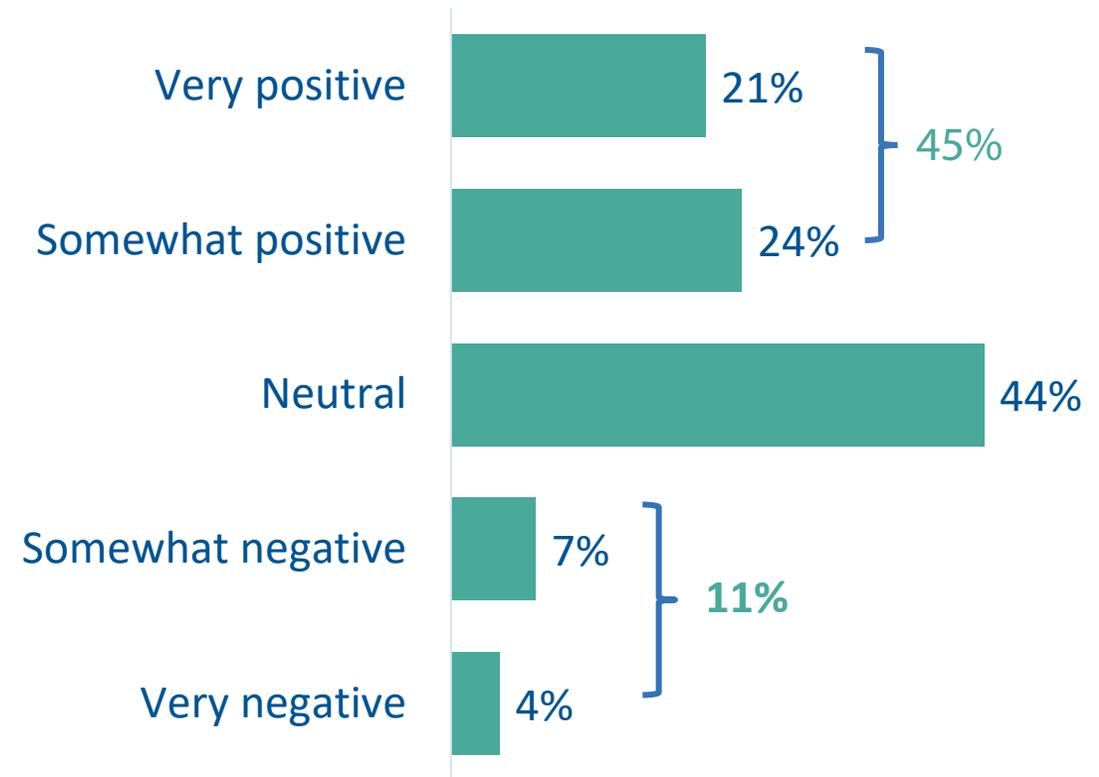
# Net Impact of Tourism (Comments)



# Quality of Life

- » A plurality of residents (44%) think tourism has essentially no impact on the quality of life for them and their families
- » Nonetheless, the number of residents who think that tourism has a positive impact on the quality of life of their families outnumbers those who think tourism has a negative impact by over 4 to 1

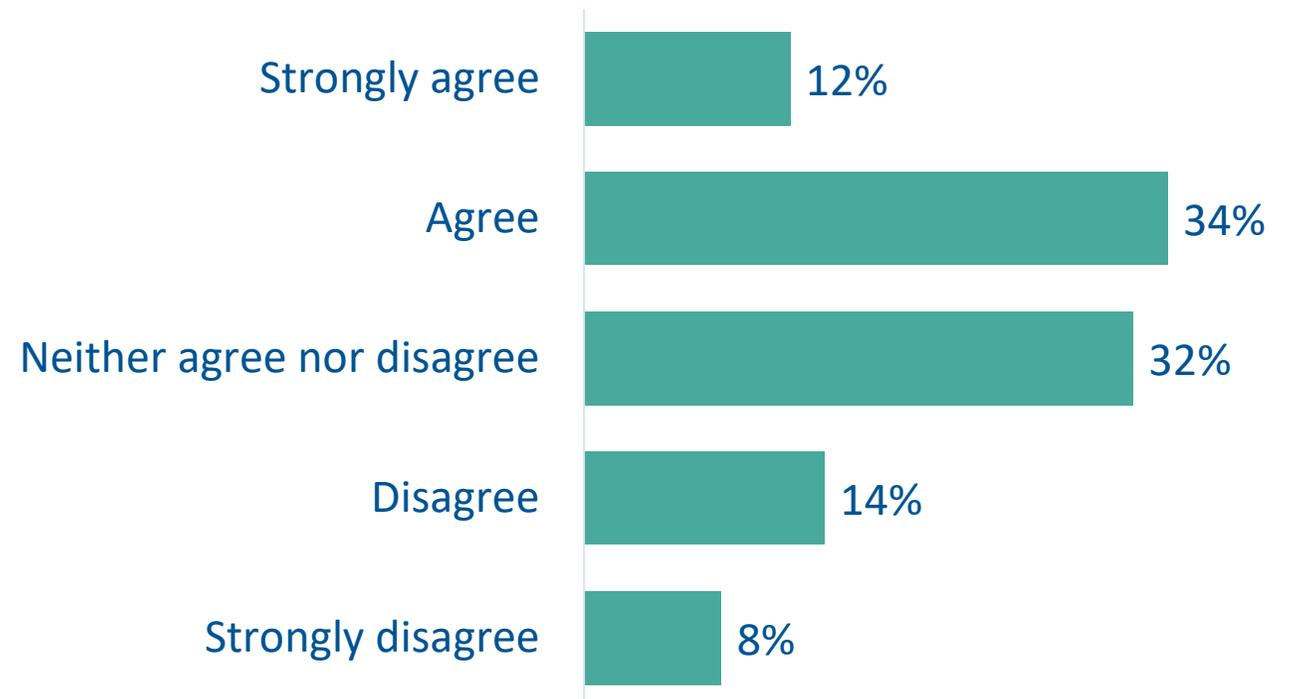
## Impact of Tourism on Residents' Quality of Life



# Planning & Organization of Tourism

- » Residents are twice as likely to agree than to disagree that tourism development in Escambia County is well planned and organized
- » Nonetheless, about one quarter of residents think that tourism is not well planned and organized

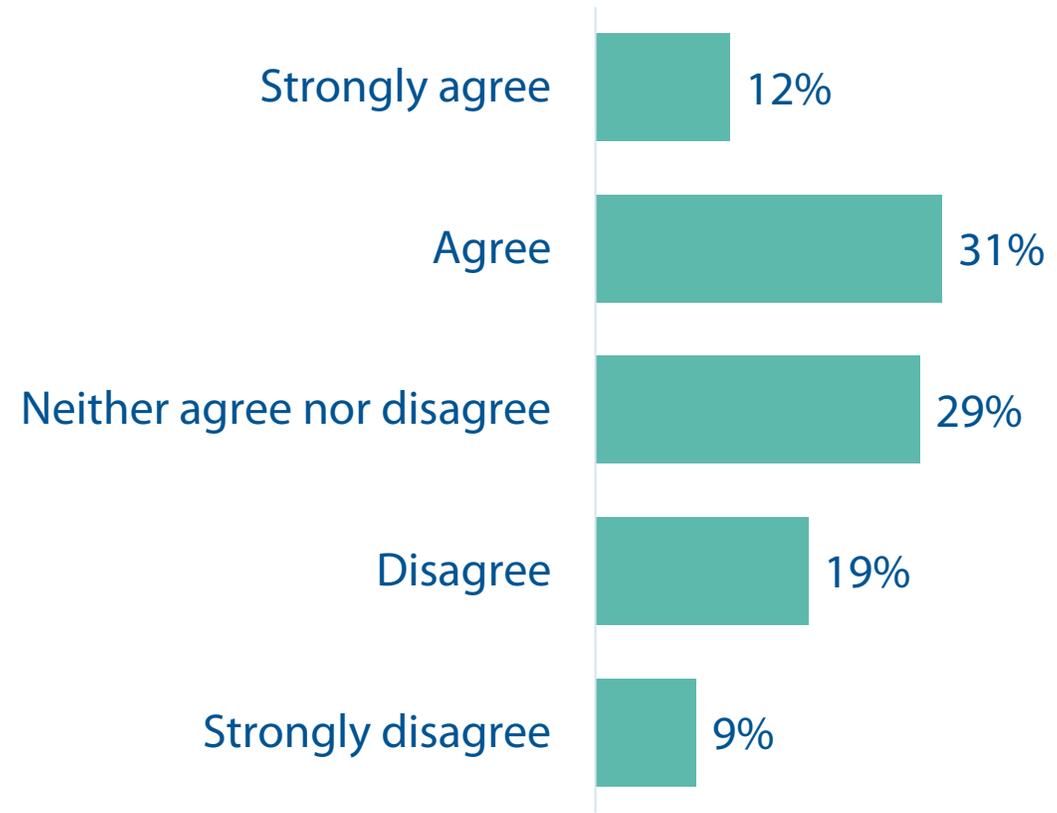
## Tourism is Well Planned and Organized



# Balancing Needs of Residents & Visitors

» The percentage of residents who feel local government does a good job in balancing needs of residents and visitors outnumber those who think otherwise by a 43% to 28% margin

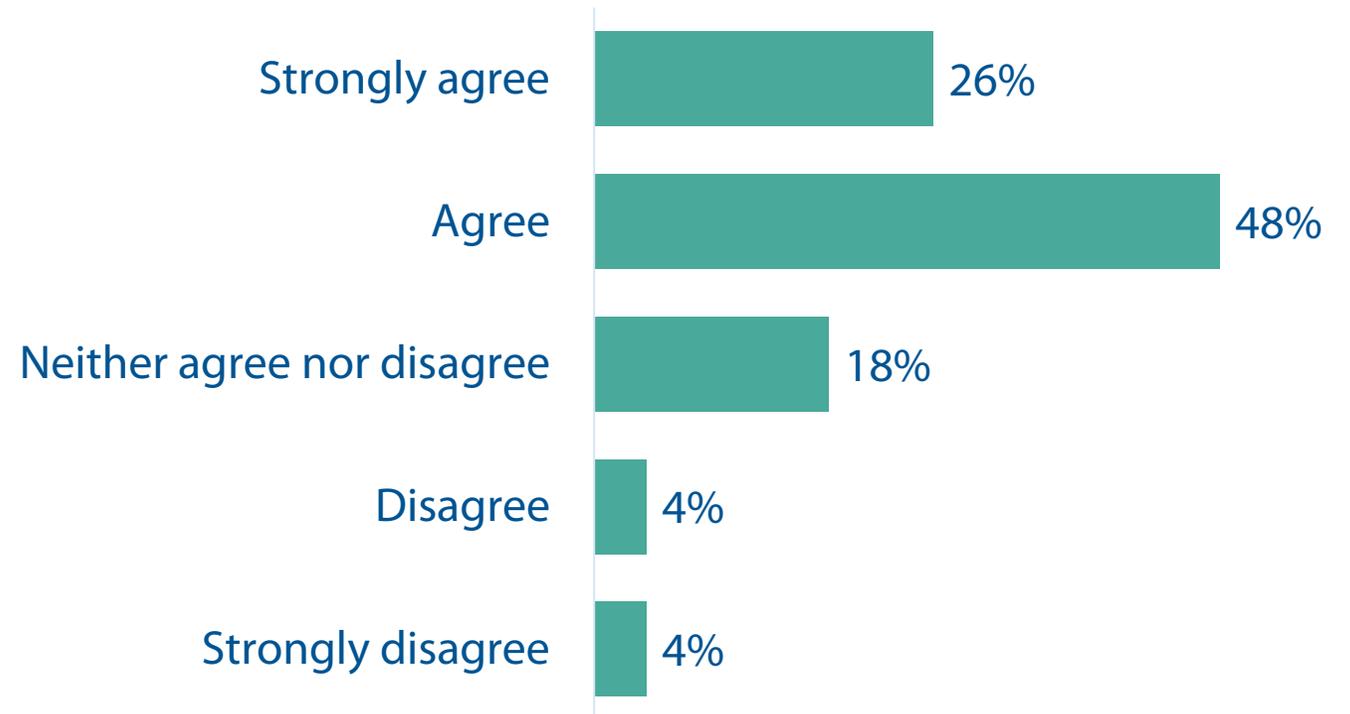
## Local Government Does a Good Job of Balancing Residents' and Tourists' Needs



# Profile of Escambia County

- » Nearly 3 in 4 residents (74%) agree tourism raises the profile and image of Escambia County
- » Conversely, fewer than 1 in 10 residents (8%) disagree with this assertion

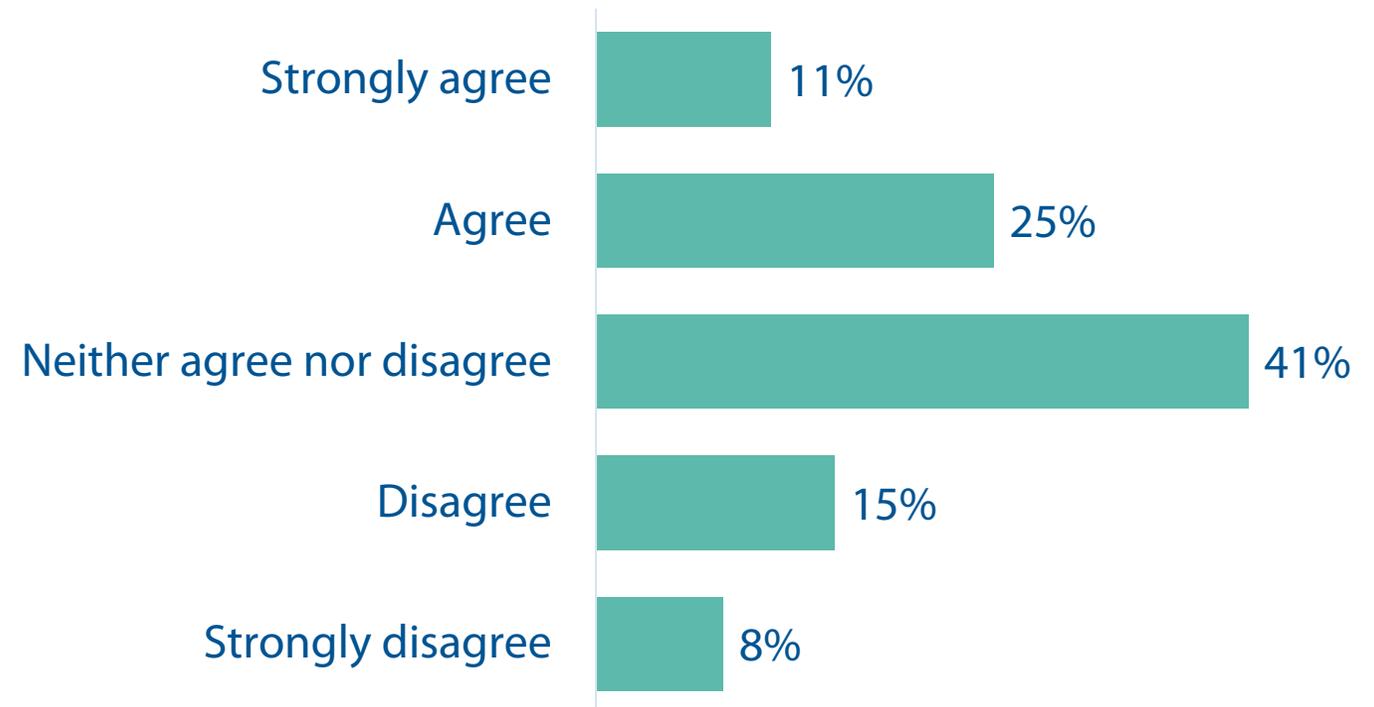
## Does Tourism Raise the Profile & Image of Escambia County



# Resident Participation in Tourism

- » Fewer than 2 in 5 residents feel they are part of the tourism development and planning process
- » Yet only 23% of residents feel left out of tourism planning and development

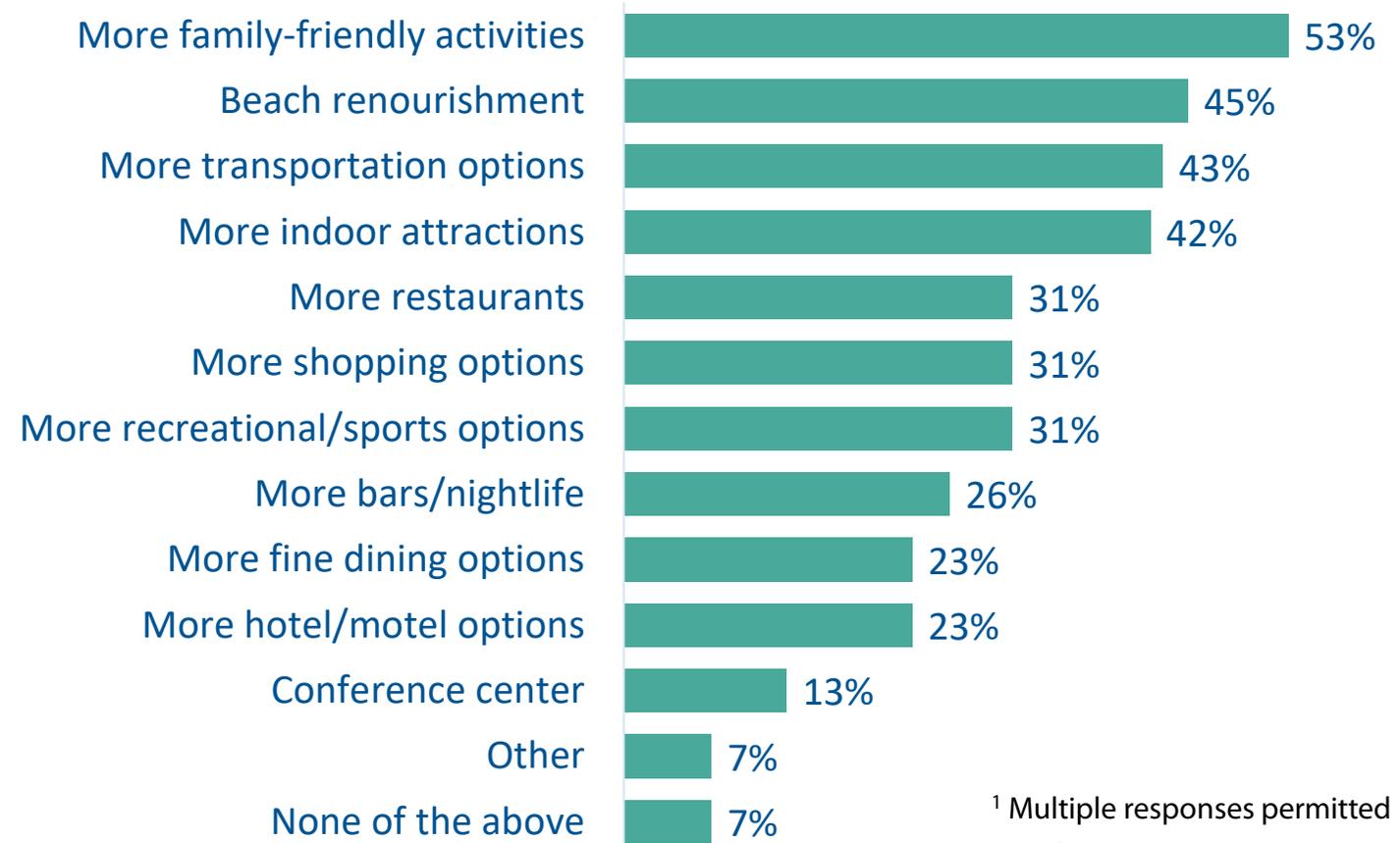
## Residents are Offered an Opportunity to be Involved with Tourism Planning & Development



# Making Pensacola Better<sup>1</sup>

- » Just over half of the residents surveyed felt more family-friendly activities would make the Pensacola area more attractive for residents and visitors
- » Residents and visitors enjoy the beach, so beach renourishment was the second most frequently selected improvement

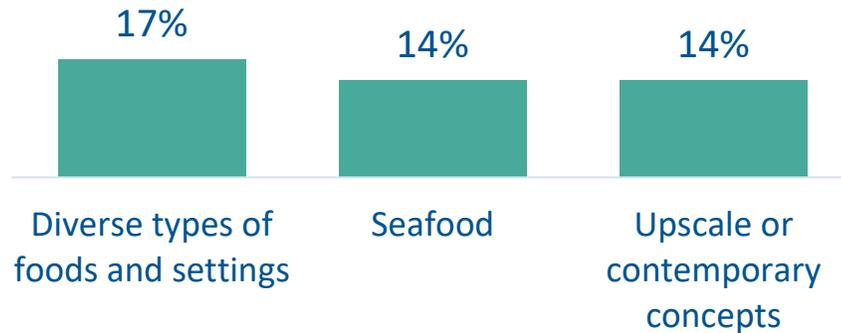
## What additions would make Escambia County a more desirable place to live and/or visit



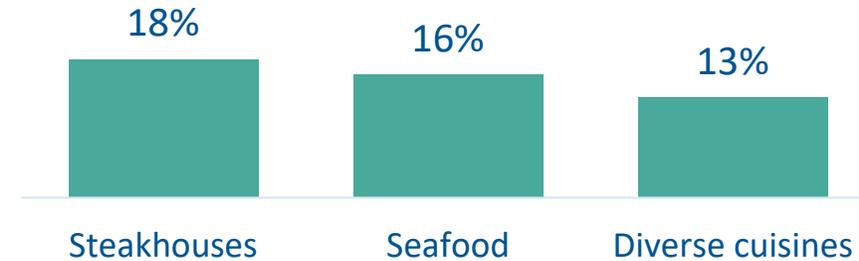
<sup>1</sup> Multiple responses permitted

# Making Pensacola Better<sup>1</sup>

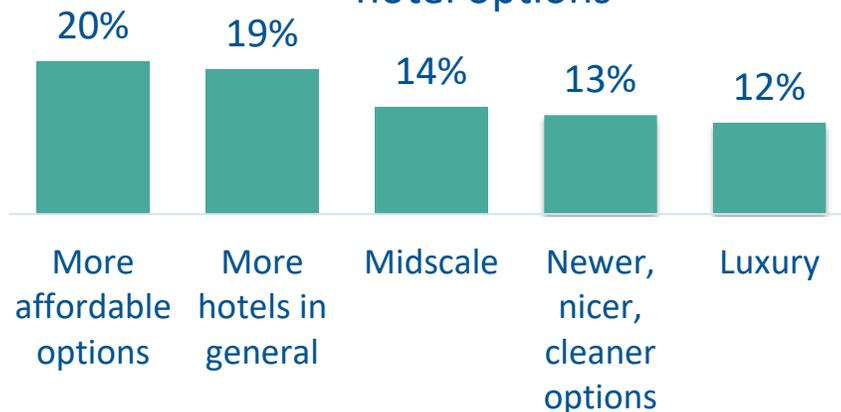
## Recommendations for more restaurants



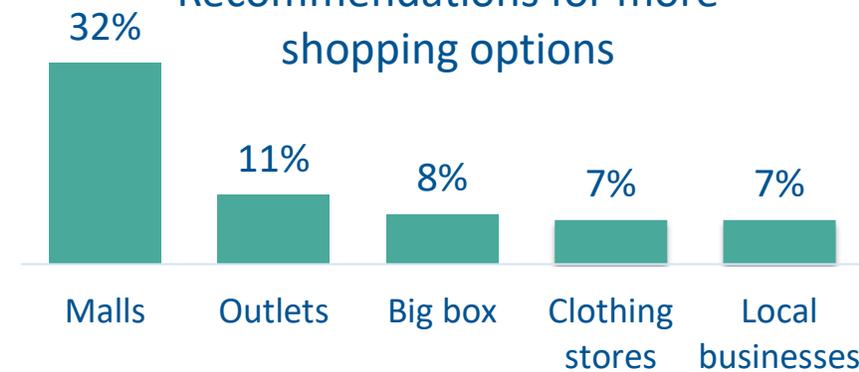
## Recommendations for more fine dining options



## Recommendations for more hotel options



## Recommendations for more shopping options



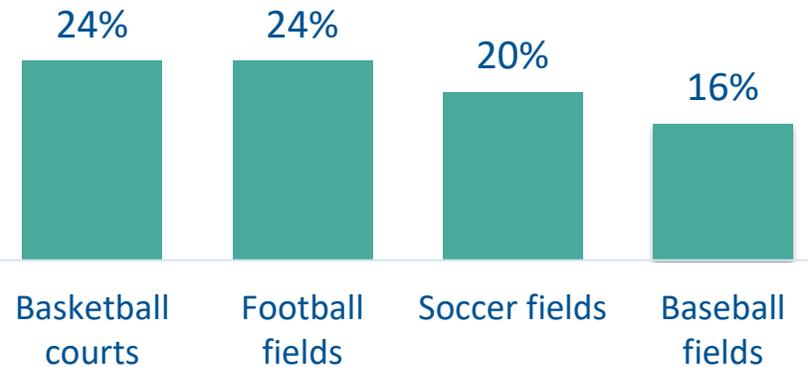
<sup>1</sup> Open-ended follow-up question only asked to residents who selected the related recommendation.

# Making Pensacola Better<sup>1</sup>

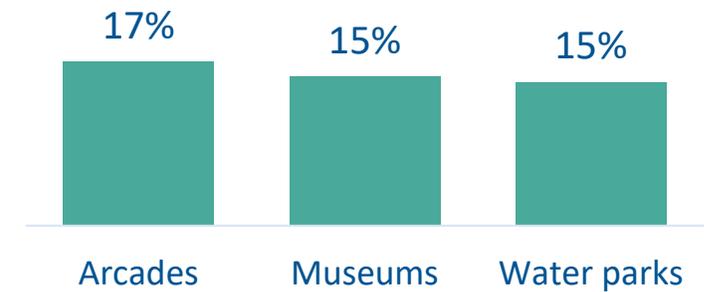
Recommendations for more nightlife options



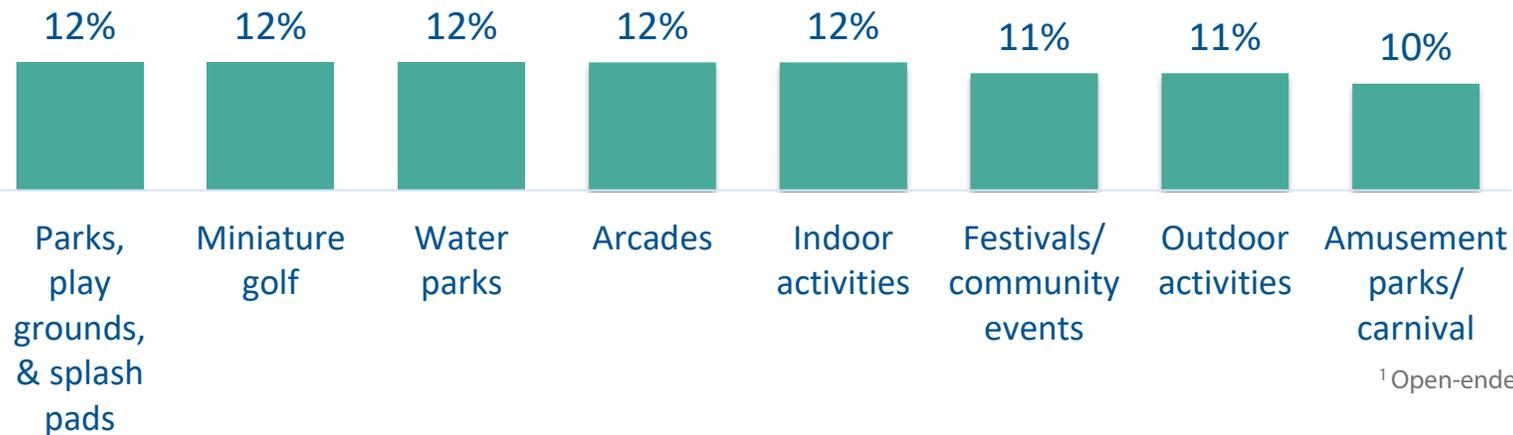
Recommendations for more sports & recreation options



Recommendations for more indoor attractions



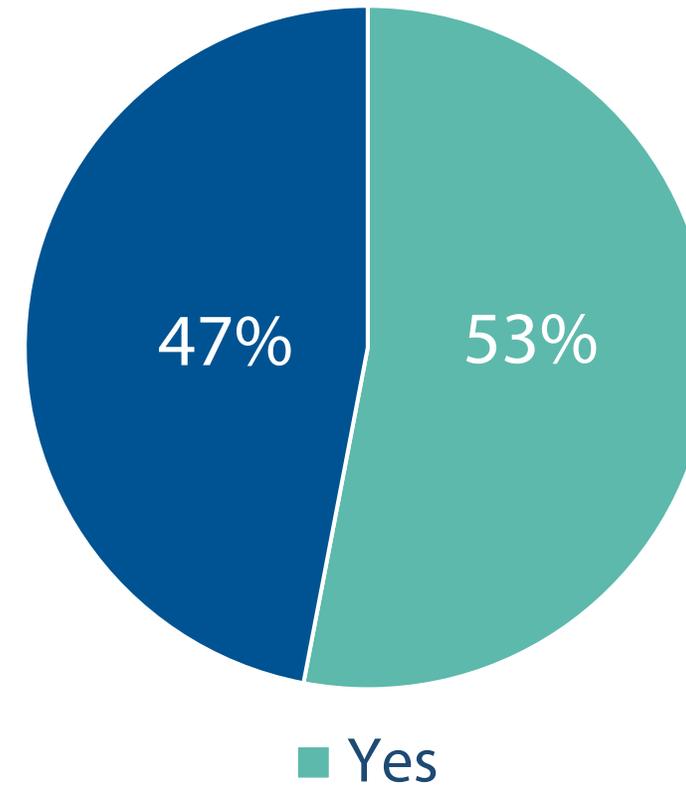
Recommendations for more family friendly activities



<sup>1</sup> Open-ended follow-up question only asked to residents who selected the related recommendation.

# Aware of Visit Pensacola

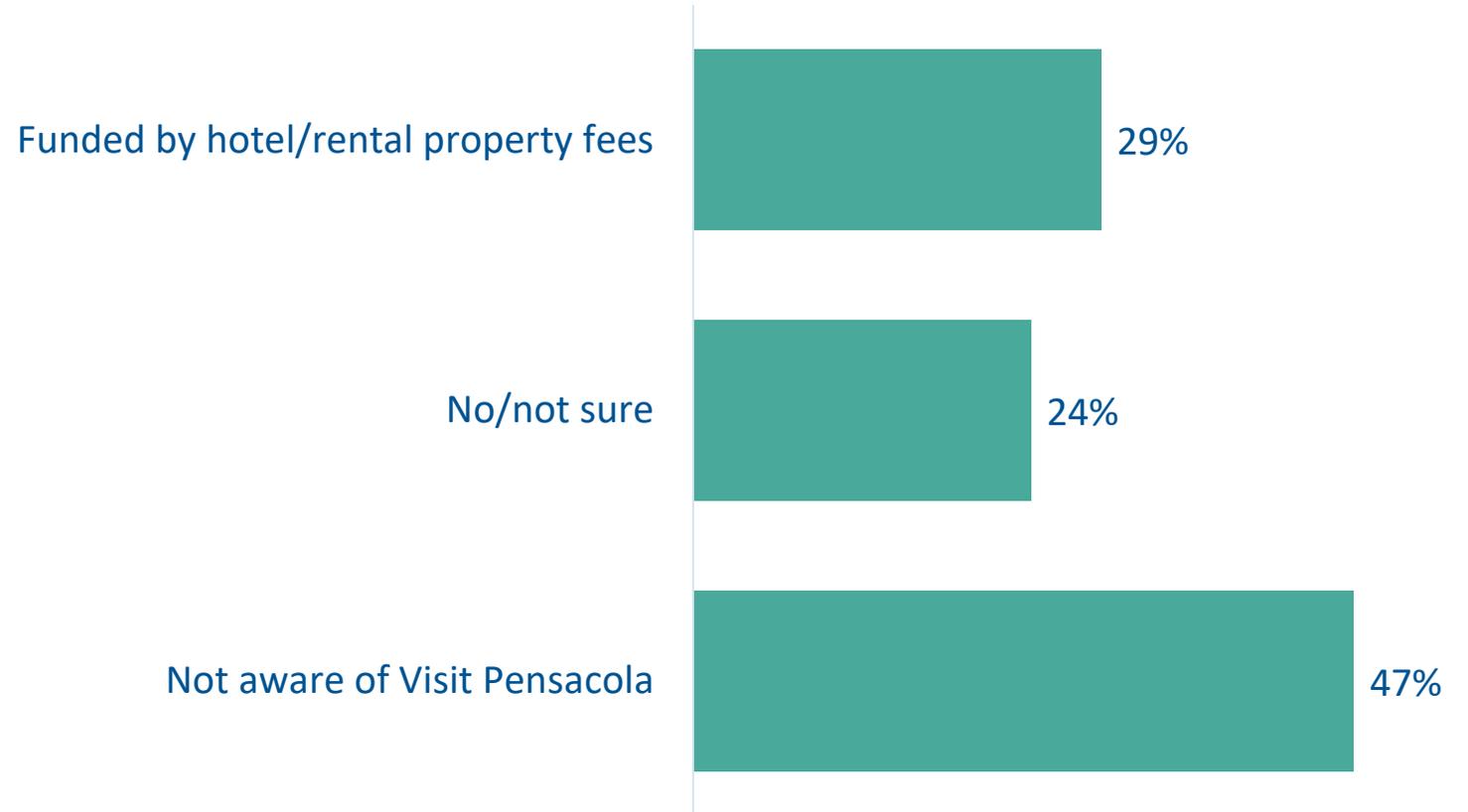
» Just over half of Pensacola area residents claim to be aware of Visit Pensacola



# Aware of Visit Pensacola's Funding Source

» Fewer than 3 in 10 Pensacola area residents purport to know the source of Visit Pensacola's funding

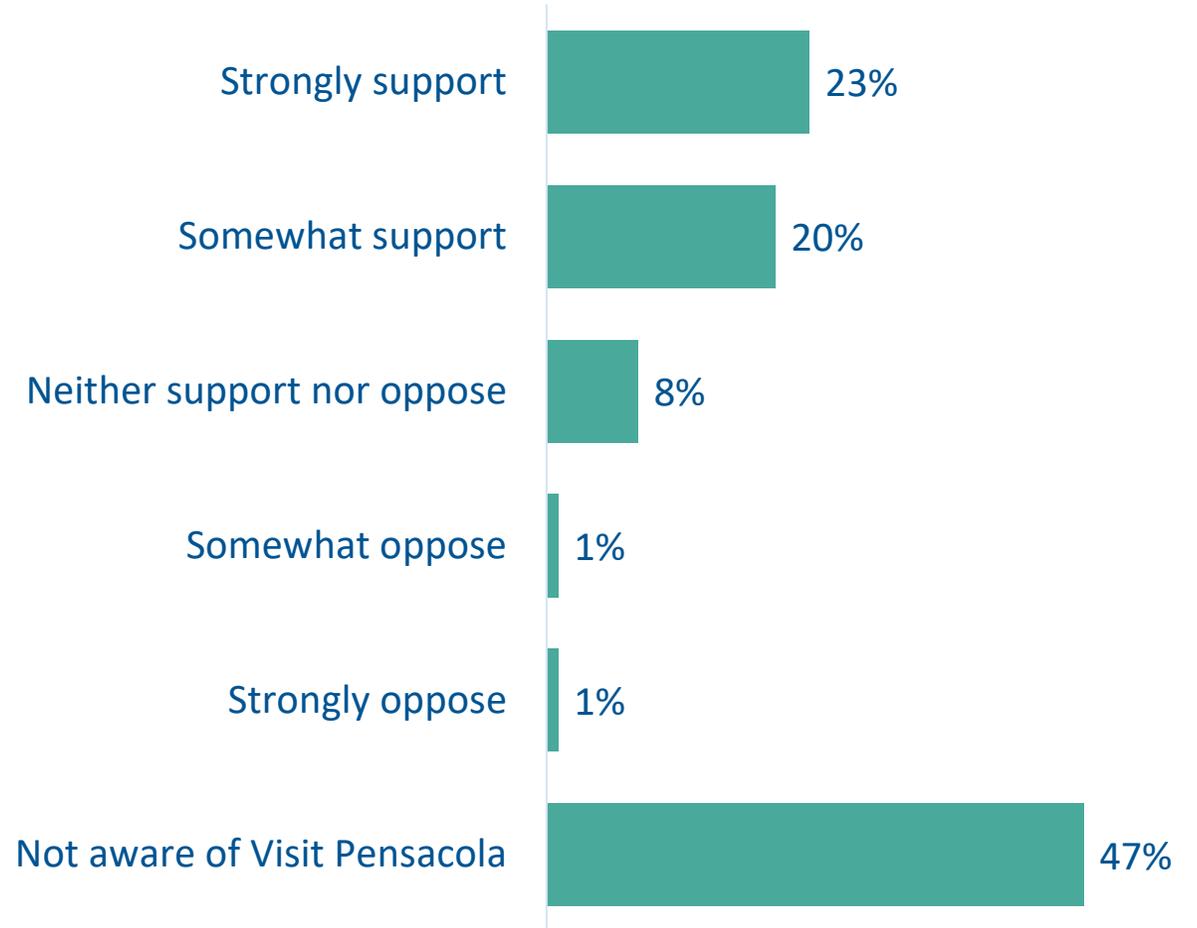
Aware of Visit Pensacola's Funding Source



# Support Visit Pensacola

» Over 2 in 5 of the residents surveyed support Visit Pensacola's effort to enhance the county's economy by attracting more visitors

## Support or Oppose Visit Pensacola's Efforts



# Rating Visit Pensacola

- » Nearly 3 in 10 residents (which represents 53% of residents aware of Visit Pensacola) give the organization high marks for communicating the benefits of tourism to them
- » The number of residents who give Visit Pensacola an excellent or very good rating outnumber the residents who give Visit Pensacola a fair or poor rating by nearly a 3:1 margin

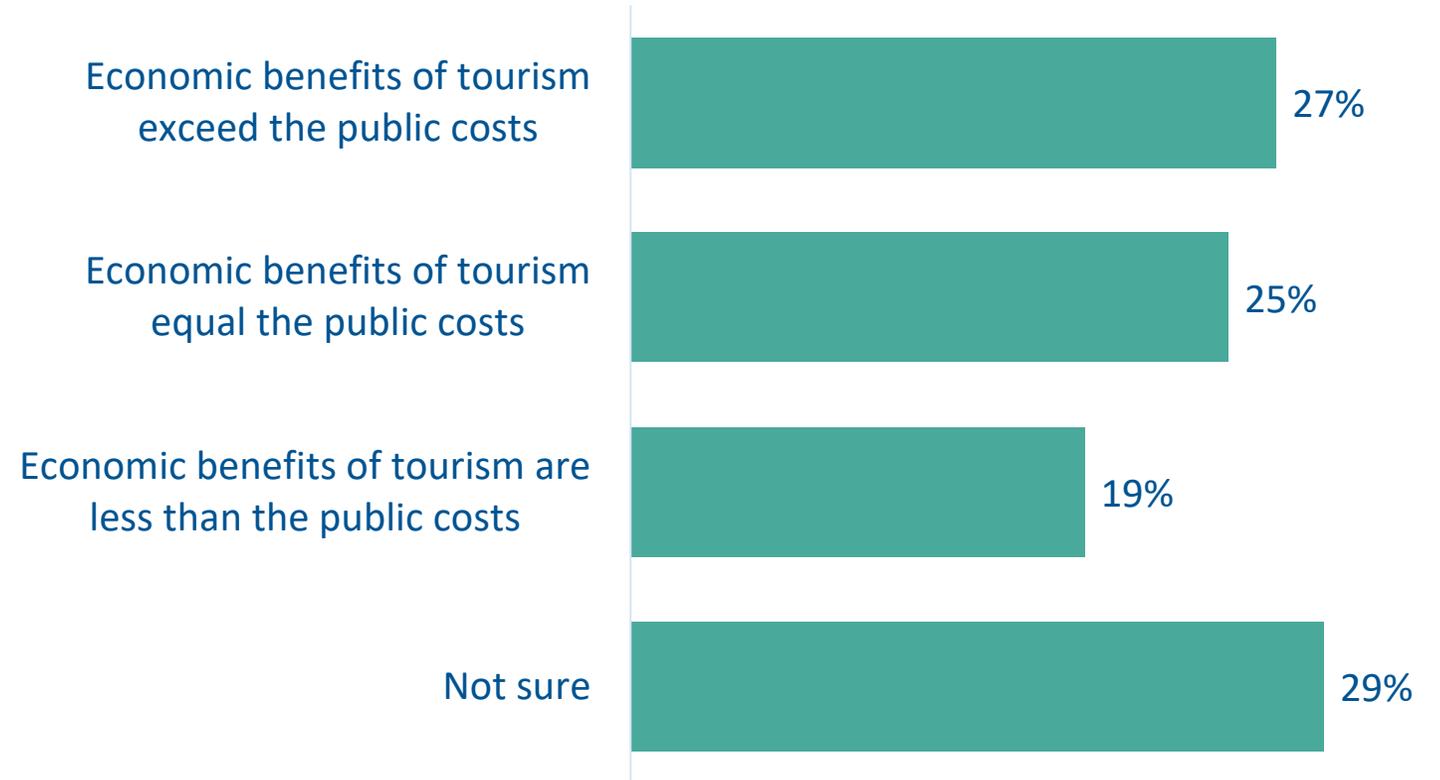
Rating Visit Pensacola's performance in communicating the benefits of tourism to residents



# Net Economic Impact of Tourism

Visitors spend money that circulates throughout Escambia County's economy; local governments in Escambia County spend money to build and maintain public facilities that visitors use. Do economic benefits of tourism outweigh the costs?

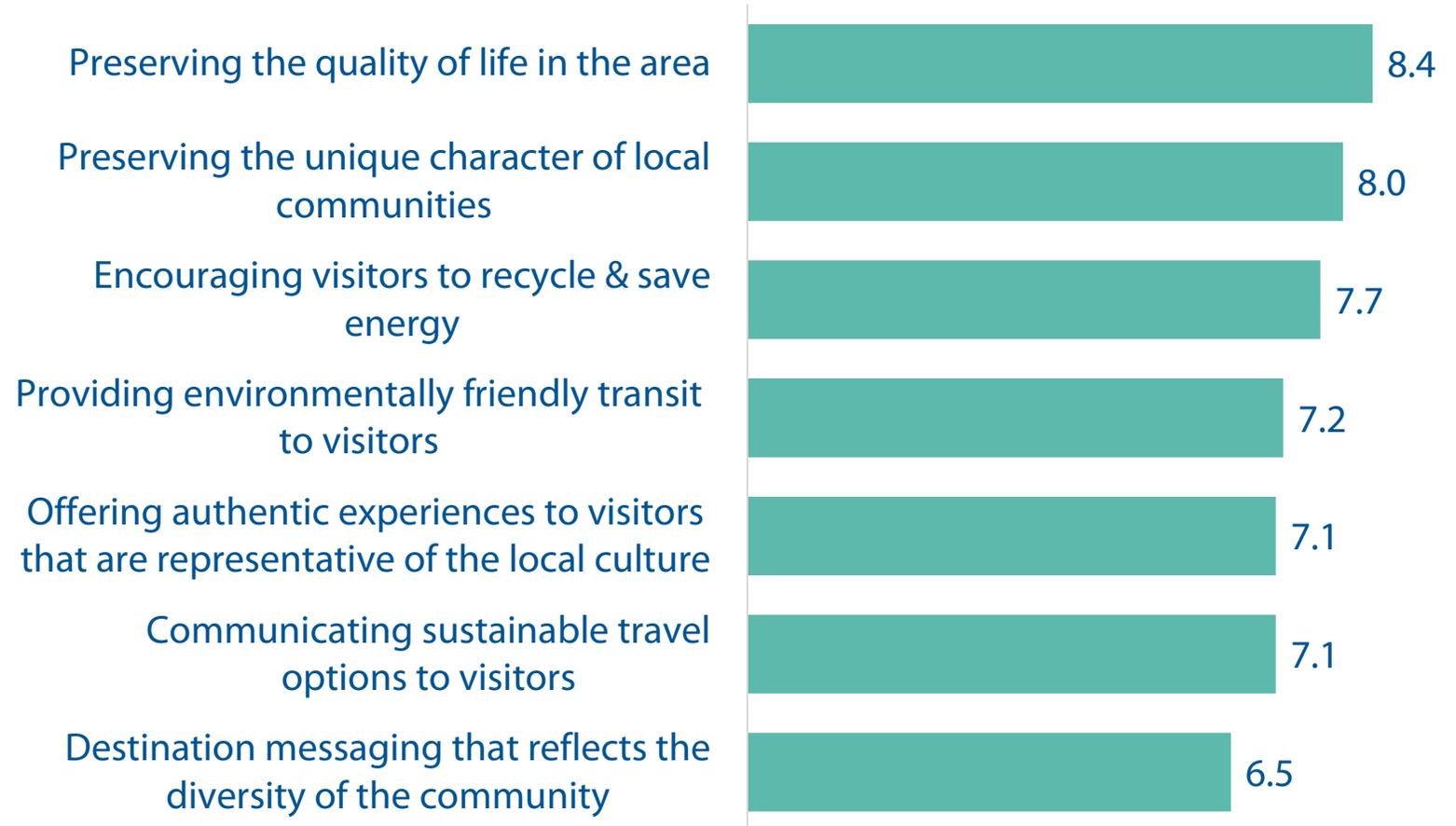
- » Fewer than 3 in 10 residents believe the economic benefits of tourism exceed the public costs required to service tourists.
- » This finding is juxtaposed with the finding in slide 12 that shows 56% of residents believe that tourism brings more money for the local economy



# Stewardship

- » Residents believe that Visit Pensacola should focus on preserving the quality of life and unique character of Escambia County
- » Residents are less interested in Visit Pensacola offering authentic experiences to visitors or communicating sustainable travel options to them
  - » Interestingly, when potential visitors were asked to rate the importance of these same components, “preserving the quality of life in the area” was also rated the highest
  - » Contrarily, “offering authentic experiences” was the second most important component for potential visitors

## Importance of Tourism Stewardship Elements



■ Average score on a scale of 1 to 10 where 10 is most important

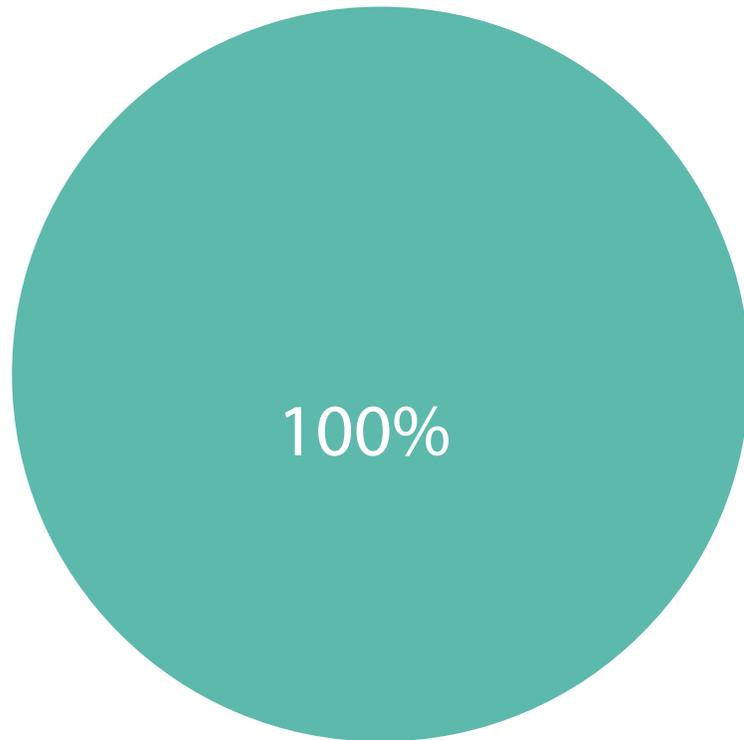
# DEMOGRAPHICS



# Residency

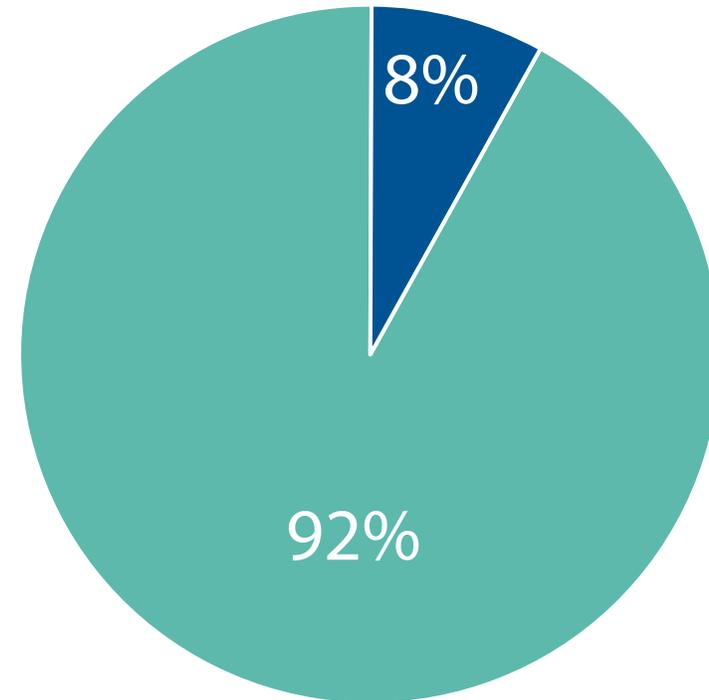
All participants in this study are residents of Escambia County; 8% are part-time residents.

Resident of Escambia County



■ Yes ■ No

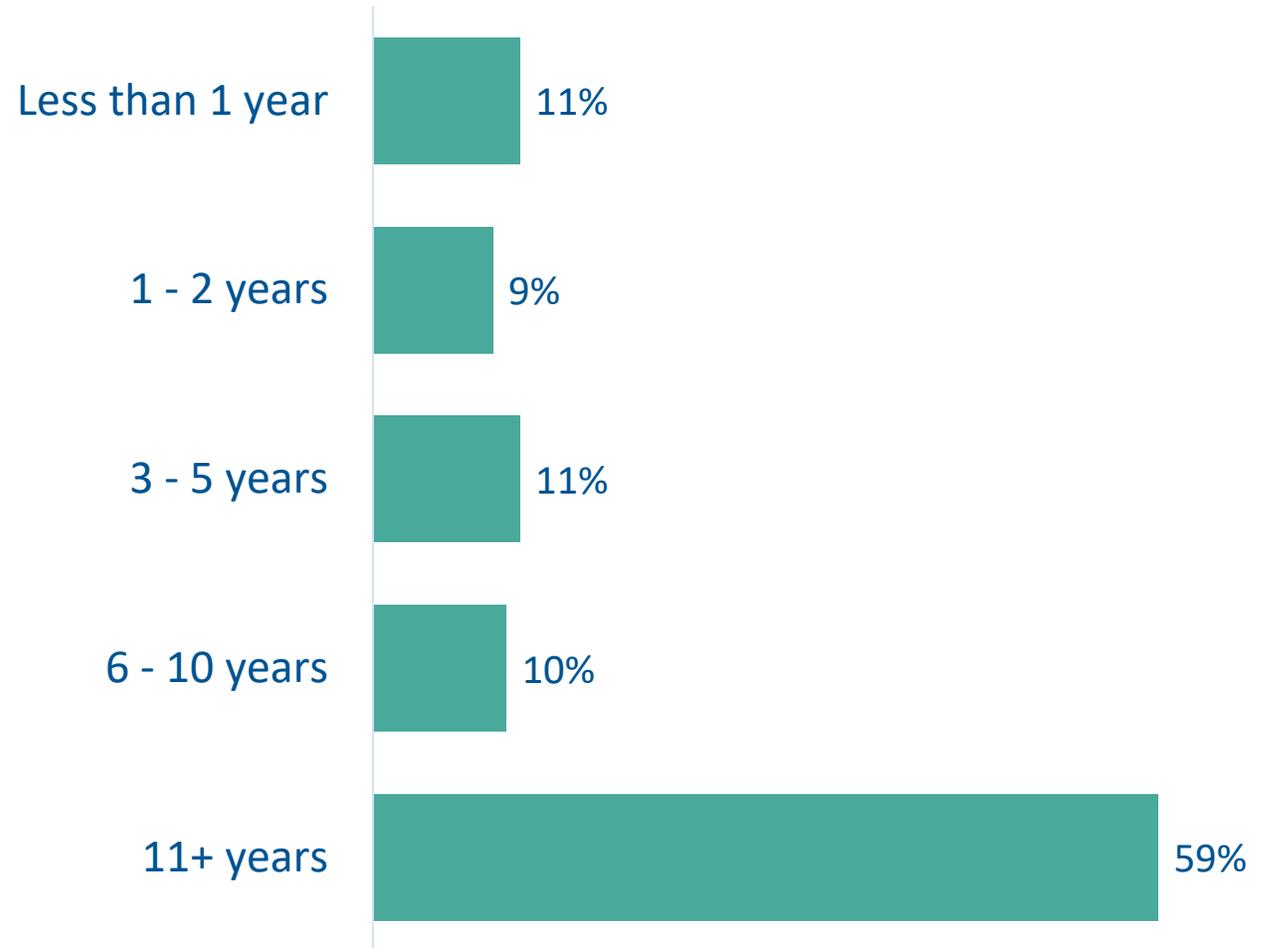
Type of Resident



■ Full-time ■ Part-time

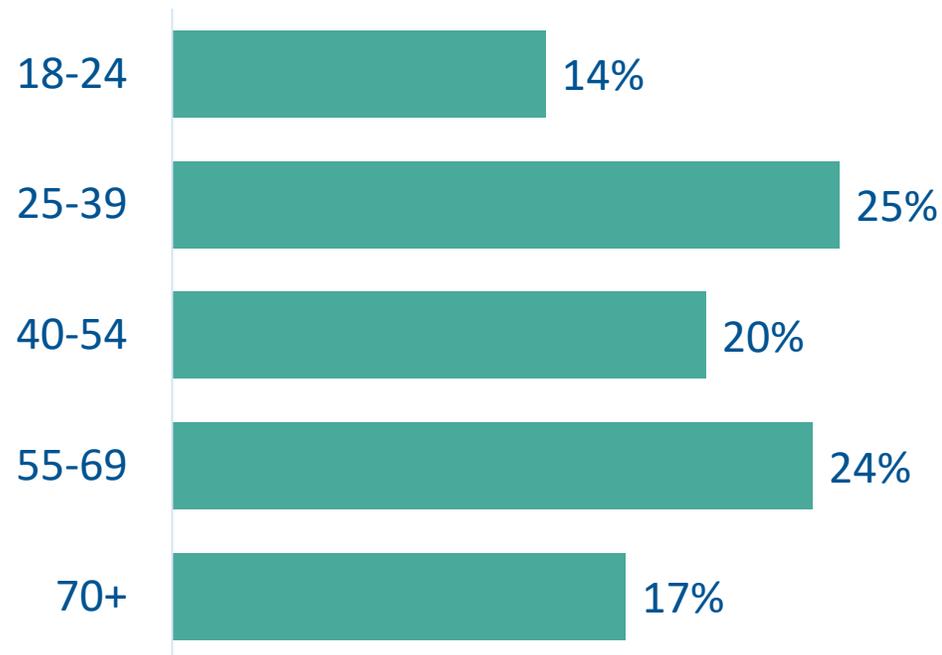
# Length of Residency

- » 3 in 5 (59%) residents in the study are well acquainted with Escambia County having lived there more than 10 years.
- » Conversely, 1 in 5 residents (20%) have lived in Escambia County for 2 years or less



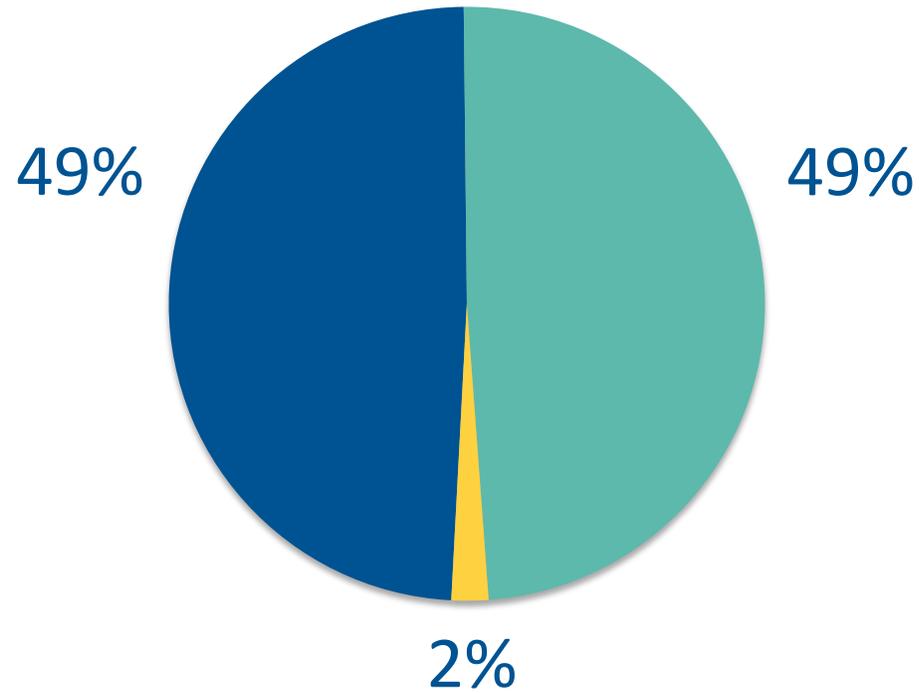
# Age of Respondents

Median age of residents in this study was 48. Ages of participants match the ages of area residents based on US Census data.



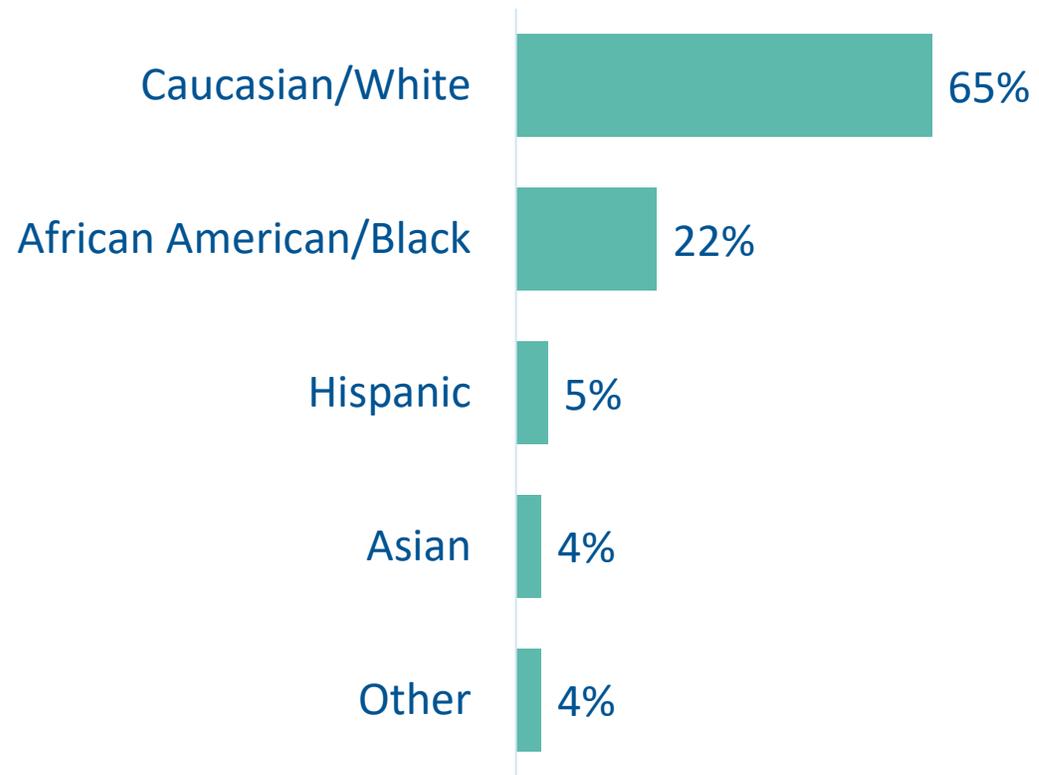
# Gender of Respondents

■ Female ■ Male ■ Non-binary



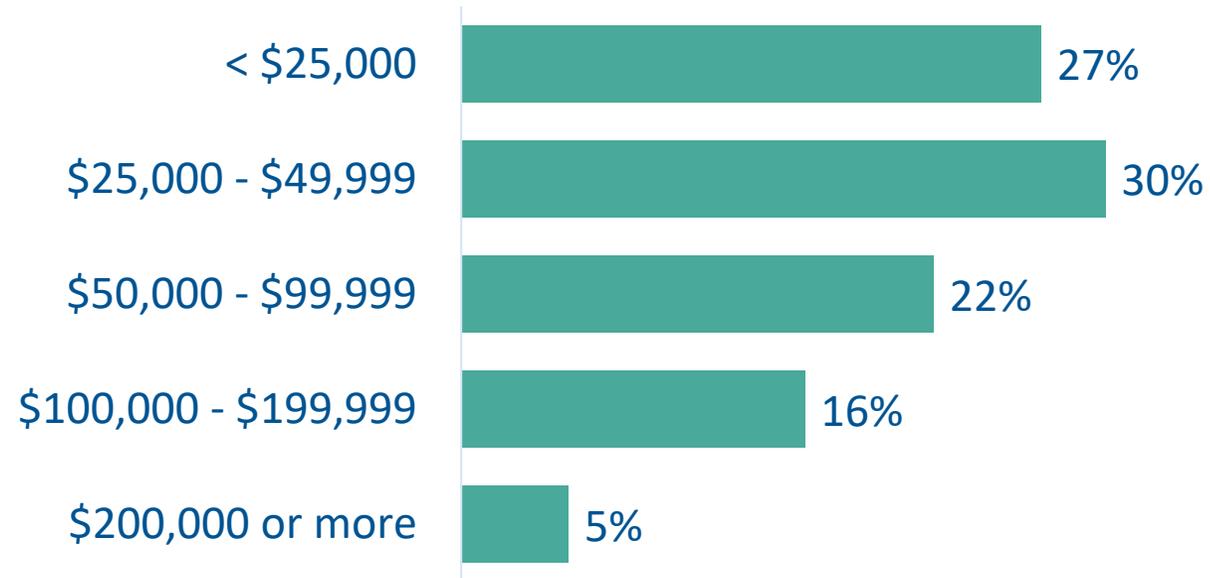
# Race/Ethnicity of Participants

Participants in the study matched the race/ethnicity of the Pensacola area population



# Household Income of Participants

Participants in the study largely matched the income distribution of the greater Pensacola area



**Median income = \$44,200**

# PENSACOLA RESIDENT OPINION STUDY

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