Santa Rosa Island Authority

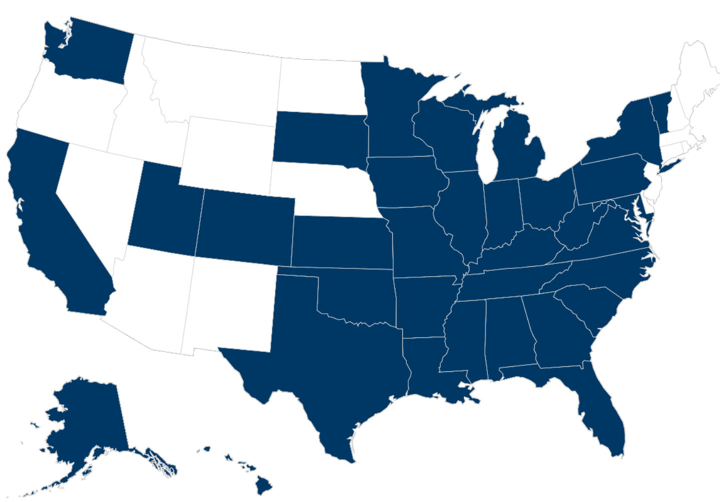
Visitor Survey 2024

Executive Summary

The Santa Rosa Island Authority Visitor Survey 2024 captured 2,308 responses. Over 47 percent of the respondents were full-time residents of the Pensacola Beach area, 9 percent were seasonal residents, 32 percent were daytrippers, and 9 percent were overnight visitors. For the purpose of the analysis, seasonal residents were defined as individuals who lived in a location for 31 or more consecutive days other than their permanent residence. Daytrippers were individuals visiting for the day, while overnight visitors were those who spent at least one night in Pensacola Beach. The analysis grouped daytrippers, seasonal residents, and overnight visitors into one category to identify metrics specific to "tourists." Therefore, any mention of tourists in the analysis referred to the group that excluded full-time residents.

The survey recorded responses from tourists representing 34 states and Washington, D.C. Orange Beach, Destin, and Navarre were the top beaches considered by tourists as alternative trip destinations. Comparatively, daytrippers also considered Perdido Beach, while overnight visitors considered 30A. Seasonal residents opted for a noncommercial air carrier more frequently than the other traveling groups. Overnight visitors were the only group to select flights with Spirit Airlines, while Delta Airlines was the most popular choice for the combined group of tourists.

Figure 1 Tourists of All Types Traveled from 34 States



Daytrippers faced challenges with parking. On average, daytrippers spent less than overnight visitors, and overnight visitors spent less than seasonal residents. Shopping was the biggest spending category for daytrippers, while accommodations accounted for the highest spending category among overnight visitors and seasonal residents. Overnight visitors expressed some concerns about the price of their accommodations. They rated their “likeliness to return” at 9.2, while daytrippers gave a slightly higher rating of 9.4. Conversely, overnight visitors rated their “likeliness to recommend Pensacola Beach” as 9.3, compared to 9.1 by daytrippers. Both scores were extremely high. Tourists also raised concerns about the cleanliness, traffic flow, prices, and crowds at the beach.

Full-time residents offered a unique perspective, prioritizing infrastructure improvements in areas such as parking, safety, and utilities. They expressed high satisfaction with the Santa Rosa Island Authority's (SRIA) performance in emergency management and public safety efforts but noted dissatisfaction with the lack of progress on sidewalk enhancements. Key public safety concerns included traffic issues, pedestrian safety, and speeding, which were frequently highlighted. Feedback on dining experiences was mixed, with residents praising the friendliness and professionalism of staff while voicing frustrations over high food and drink prices and the ongoing challenge of insufficient parking.

Overnight Visitors

Overnight visitors did not report any concerns regarding parking during their visits. However, very few of them expressed a willingness to pay more than $5 per hour for parking. When asked about the activities they enjoyed while visiting the beach, 28.6 percent of overnight visitors highlighted restaurant dining in Pensacola Beach as a favorite experience. On a scale of 1 to 10, with 10 being the most likely, overnight visitors rated their likelihood of returning to Pensacola at an impressive 9.2. Similarly, they rated their likelihood of recommending Pensacola Beach to a friend at 9.3, reflecting their overall satisfaction with the destination.

Figure 2 Overnight Visitor Rantings

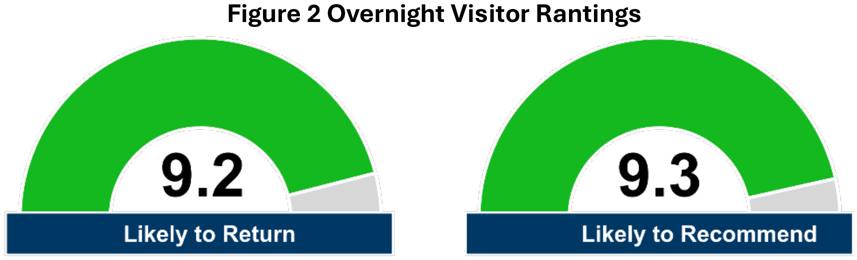
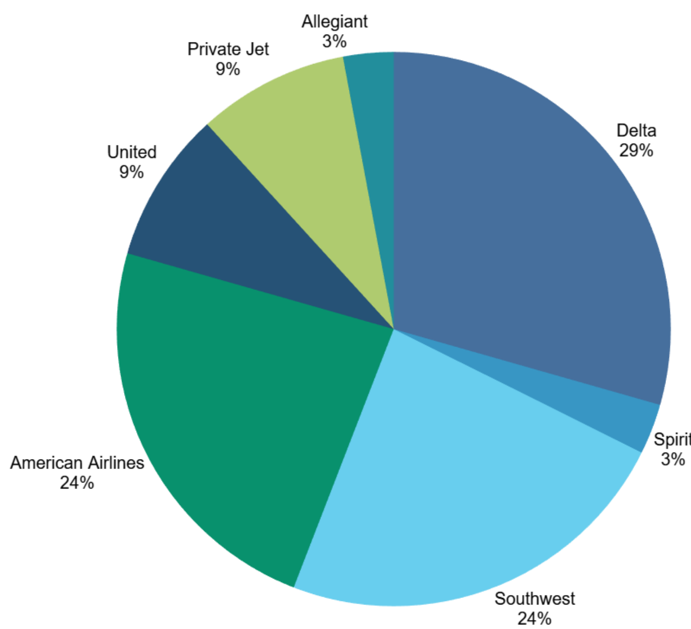


Table 1: Overnight Visitor Accommodation Ratings (1=lowest; 5=highest)

	1	2	3	4	5
Friendly and professional staff	0.00%	1.72%	7.76%	22.41%	68.10%
Sufficient parking available	0.77%	8.46%	10.00%	15.38%	65.38%
Amenities as advertised	0.00%	3.91%	7.03%	25.78%	63.28%
Clean	0.00%	4.58%	7.63%	25.19%	62.60%
Variety of options	1.57%	3.94%	15.75%	30.71%	48.03%
Reasonably priced	1.54%	13.85%	24.62%	26.15%	33.85%

Figure 3 Airlines Selected by All Tourist Types



Overnight visitors expressed concerns about the pricing of accommodations during their stay (Table 1). When planning their trips to Pensacola Beach, they frequently considered alternative destinations, with Orange Beach, Destin, 30A, and Navarre emerging as the top four choices. Approximately 85 percent of overnight visitors chose to travel using personal vehicles, rentals, or rideshares.

The Hilton and Hampton Inn accommodated a significant portion of overnight respondents, while a quarter of these visitors reported staying in "other" hotels that were not listed in the survey. Southwest Airlines was the most popular choice among overnight visitors, with 44 percent opting for this carrier, followed by Delta Airlines, which accounted for 22 percent of the respondents. Notably, overnight visitors were the only group to fly with Spirit Airlines. In total, overnight visitors traveled to Pensacola Beach from 29 different states, reflecting a wide geographic reach.

Daytrippers

Daytrippers represented full-time residents from 15 different states, demonstrating the diverse origins of this group. They identified parking as the biggest area needing improvement. In contrast, overnight visitors did not report any concerns related to parking. Parking challenges were a common issue for daytrippers, with 31 percent stating that it was somewhat difficult or extremely difficult to find a parking spot. Some daytrippers reported accommodations because they stayed in nearby areas such as Pensacola or Gulf Breeze.

When considering alternative destinations, the top four beaches favored by daytrippers were Perdido, Navarre, Orange Beach, and Destin. Interestingly, some daytrippers indicated that they traveled to the beach by air. Among these respondents, American Airlines and Delta Airlines were the most popular choices, each accounting for 40 percent of selections, followed by Southwest Airlines at 20 percent.

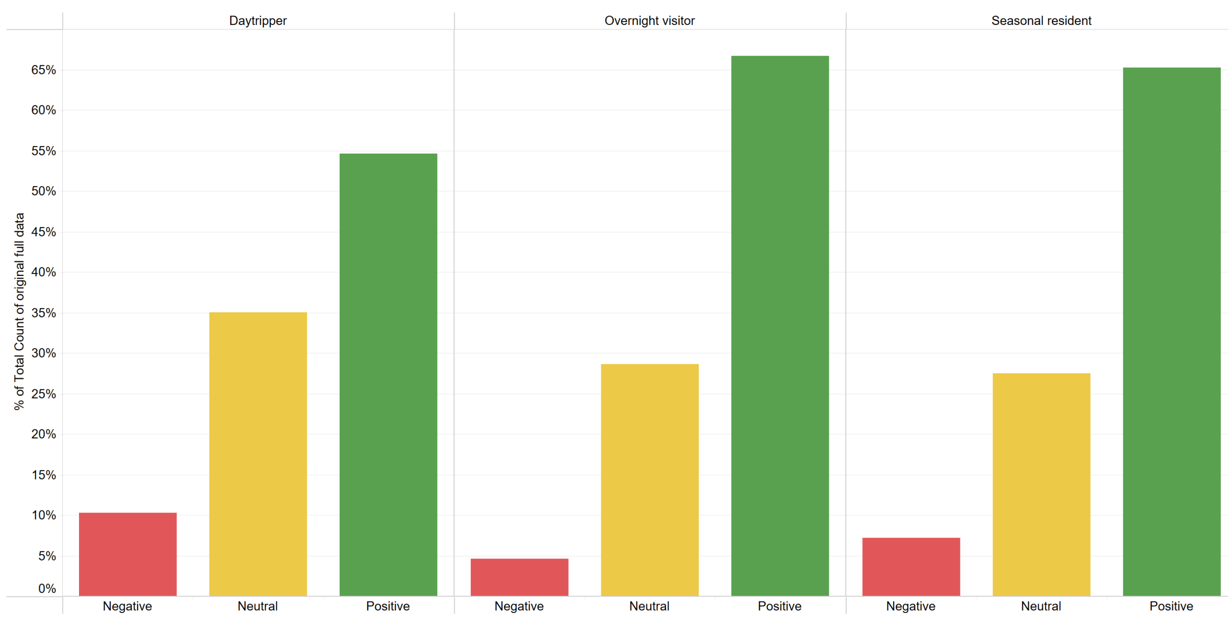
On a scale of 1 to 10, with 10 being the most likely, daytrippers expressed a strong likelihood of returning to Pensacola, rating it at 9.4. Similarly, they rated their likelihood of recommending Pensacola Beach to a friend at 9.1, indicating high levels of satisfaction with their experience.

Figure 4: Daytripper Visitor Rates

Seasonal Residents

Survey responses indicated that seasonal residents came from 30 different states. Despite 76 percent of seasonal residents staying in their own personal houses or condos, they still expressed concerns about the cost of accommodations. Comparatively, 12 percent of overnight visitors stayed in short-term rentals or condos, while another 5 percent opted for hotels. During their most recent visits, seasonal residents most frequently dined at casual dining establishments, fine dining restaurants, and breakfast spots. This group also displayed the greatest diversity in airline choices. Five percent of seasonal residents reported flying with Allegiant Airlines, while the top three airlines used were Delta (30 percent), American (25 percent), and Southwest (15 percent). Additionally, 15 percent of seasonal residents utilized noncommercial air carriers for their travel needs.

Figure 5: Rating of Last Visit by Tourist Type



All Tourists

In this section, a "tourist" referred to any individual who identified as a daytripper, an overnight visitor, or a seasonal resident. Full-time residents were excluded from this definition. When asked what needed improvement, both seasonal residents and overnight visitors most frequently selected "other." Within the written responses under the "other" category, comments commonly mentioned the size of the crowds on the beaches and concerns about the general cleanliness of the area. Additionally, traffic flow and prices were highlighted as areas needing improvement. Only 16 states were not represented in the survey responses. The analysis revealed that overnight visitors had the most positive experiences, with the highest percentage of ratings in the 9 to 10 range. In contrast, daytrippers expressed the most dissatisfaction, as their ratings frequently fell in the 0 to 6 range. Among all tourists surveyed, Delta emerged as the most popular airline, preferred by 29 percent of the total group.

Figure 6: All Tourist Types by ZIP Code of Permanent Residence

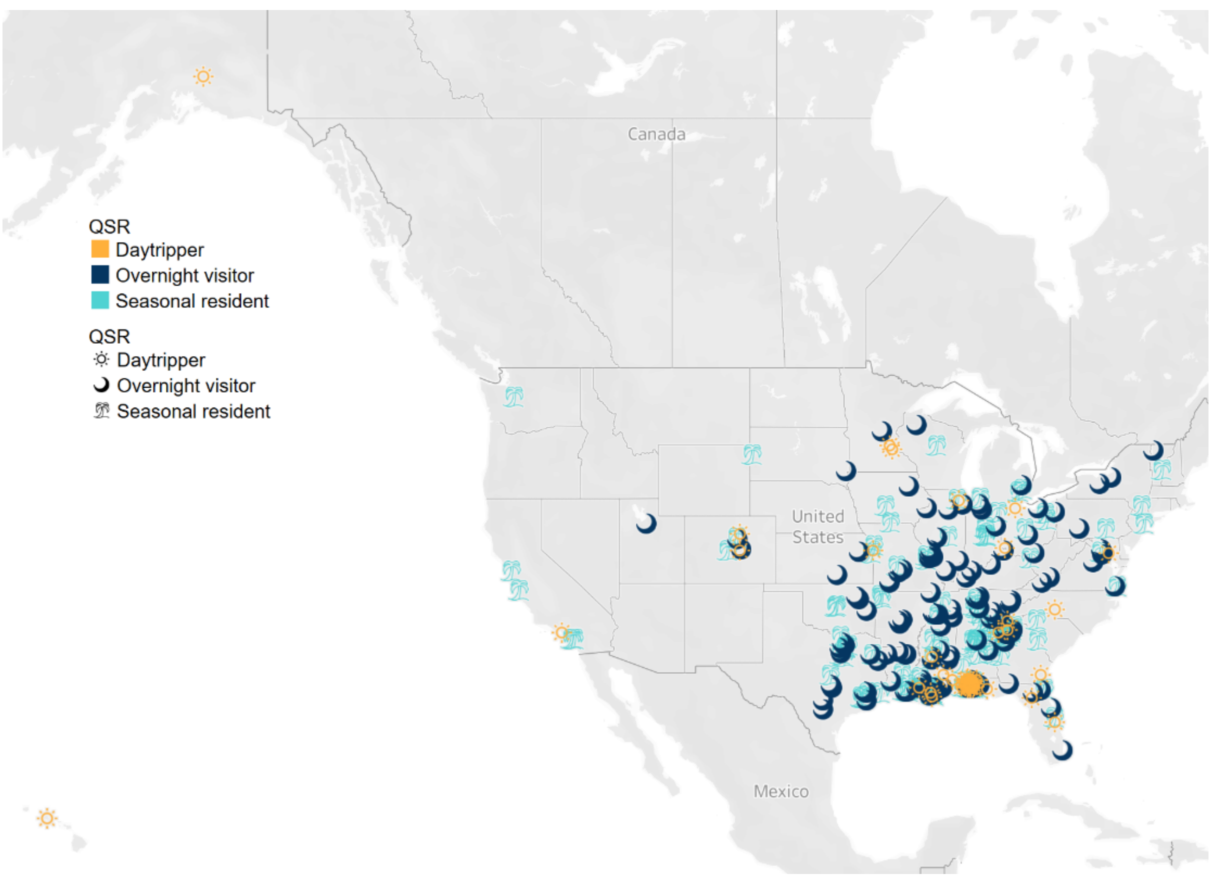


Table 2: Total Trip Expense Estimates

Average Spending Categories	**Seasonal Resident**	**Overnight Visitors**
Accommodations	$2,229.08	$1,671.95
Groceries/Restaurants	$1,496.06	$452.89
Sporting Events/Recreation/Entertainment	$405.94	$114.60
Shopping	$645.94	$176.67
Transportation/Gas	$345.05	$74.04
Miscellaneous	$463.25	$120.16
	$5,585.32	**$2,610.31**

Table 3: Daily Expenses

Average Spending Categories	**Seasonal Resident**	**Overnight Visitors**
Accommodations	$177.64	$335.58
Groceries/Restaurants	$99.44	$131.01
Sporting Events/Recreation/Entertainment	$31.73	$44.78
Shopping	$393.93	$62.37
Transportation/Gas	$18.12	$26.96
Miscellaneous	$20.71	$46.36
	$741.57	**$647.06**

Full-time Residents

The data provides detailed insights into the full-time residents of Pensacola Beach and their perceptions of local infrastructure, safety, and dining experiences. The majority of full-time residents are aged 55–64 and earn $150,001 or more annually. Demographically, the population is predominantly white, comprising 84 percent of respondents, with nearly 4 percent identifying as Spanish, Hispanic, or Latino. Gender distribution is fairly balanced, with 52 percent female and 45 percent male residents.

When considering infrastructure, residents identified parking, safety, and utilities as their top priorities. Their assessment of the Santa Rosa Island Authority (SRIA) revealed varying levels of satisfaction. They rated SRIA highest for providing quality emergency management services, with an average score of 3.98, and for ensuring public safety, which scored 3.83. However, residents expressed dissatisfaction with improvements to sidewalks, which received the lowest average rating of 3.22. Overall, residents were most satisfied with SRIA's efforts to maintain a safe community, followed by promoting the island's image, protecting the environment, and encouraging infrastructure investments (Table 4).

Public safety concerns were also highlighted. Specific concerns within this category included traffic (37 mentions), crosswalk safety (26 mentions), pedestrian safety (19 mentions), and speeding (12 mentions). Burglaries and theft were also significant, with 30.6 percent of respondents expressing worry about these crimes.

Dining experiences on Pensacola Beach were rated positively in some areas but fell short in others. Residents appreciated the friendliness and professionalism of restaurant staff, which scored an average of 3.99, and the cleanliness of establishments, rated at 3.67. However, dissatisfaction arose regarding the high prices of food (3.07) and drinks (3.13), as well as insufficient parking, which received the lowest score of 2.79.

The narrative underscores both the strengths and areas for improvement as identified by the residents, offering valuable guidance for local authorities and businesses.

Table 4: When thinking about the infrastructure of Pensacola Beach, how strongly do you disagree or agree (1=strongly disagree, 5=strongly agree) with the following statements? Over the past year, the Santa Rosa Island Authority has:

	MEAN
Provided quality emergency management services	3.98
Ensured public safety	3.83
Maintained parks and beach access points	3.77
Enforced building and property codes	3.40
Improved walkability/bikeability	3.32
Improved street lighting	3.28
Improved sidewalks	3.22

Survey Conclusions

The survey results highlighted several key insights about the experiences of tourists and residents visiting Pensacola Beach. Overnight visitors reported highly positive experiences, with many citing restaurant dining as a highlight and expressing strong intentions to return and recommend the beach to others. However, pricing for accommodations was noted as a concern, and very few visitors were willing to pay more than $5 per hour for parking.

Daytrippers faced more challenges, particularly with parking, which emerged as the most significant issue. Despite this, they also expressed a high likelihood of returning and recommending the beach. Seasonal residents demonstrated diverse travel preferences, with most staying in personal homes or condos, but they also highlighted concerns about the cost of accommodations and crowded conditions on the beaches.

Across all groups, the size of beach crowds, traffic flow, and pricing were areas that needed improvement. Delta Airlines emerged as the most popular carrier overall, while other airlines like Southwest and Spirit also had a notable presence among specific groups. These findings provide valuable insights for local authorities and businesses to enhance the visitor experience while addressing recurring concerns.

Full-time residents provided a distinct perspective, emphasizing infrastructure priorities like parking, safety, and utilities. Their feedback on the Santa Rosa Island Authority (SRIA) showed high satisfaction with emergency management and public safety but dissatisfaction with sidewalk improvements. Public safety concerns such as traffic, pedestrian safety, and speeding also stood out as significant issues. Dining experiences were mixed, with praise for friendly staff but dissatisfaction with high food and drink prices and limited parking.

Overall, the data underscores the need for targeted improvements in infrastructure, public safety, and affordability to enhance the experience for all groups while maintaining Pensacola Beach's appeal as a premier destination.

Total Impact of Tourism in Pensacola Beach 2024

The survey asked participants to identify whether they were full-time residents, seasonal residents, daytrippers, overnight visitors, or had no relationship with Pensacola Beach. Among the responses, 47 percent were full-time residents, 3 percent did not live on or visit the beach, 9 percent were seasonal residents, 9 percent were overnight visitors, and 32 percent were daytrippers. Since the leadership team at SRIA tasked us with measuring the economic impact of tourism, we excluded full-time residents and individuals with no interaction with the beach from the analysis. As a result, this report focuses on the three primary tourism groups: Overnight Visitors, Daytrippers, and Seasonal Residents. After removing the excluded respondents, the adjusted distribution of tourism groups shows that 17.9 percent were seasonal residents, 63.6 percent were daytrippers, and 18.4 percent were overnight visitors.

The analysis details the spending and economic impacts for each of these tourism groups. The data is broken down into four key tables. Table 1 summarizes the total tourism impact across all three groups. Table 2 highlights the economic impact of overnight visitors, while Table 3 focuses on the contributions of daytrippers. Table 4 details the economic activity generated by seasonal residents. All figures are reported in 2024 dollars.

Tourism spending on Pensacola Beach has a significant economic impact. It supports 8,242 jobs, generating $287,640,821 in personal income and contributing $493,519,338 to the Gross Regional Product (GRP). Additionally, this spending generates $131,761,275 in combined tax revenue at the federal, state, and county levels.

Total Tourism Impact

Table 1: Total Impact of Tourism in Pensacola Beach

	Employment	Personal Income	GRP	Output	Total Tax
Direct	6,201	$189,230,751	$315,722,227	$621,441,201	$91,851,726
Indirect	1,283	$59,480,705	$101,958,675	$216,868,131	$22,558,252
Induced	758	$38,929,365	$75,838,436	$128,112,779	$17,351,297
	8,242	$287,640,821	$493,519,338	$966,422,111	$131,761,275

Overnight Visitor Impact

The economic impact of this tourism spending supports 2,031 jobs, generating $70,876,436 in labor income and contributing $121,606,145 to the Gross Regional Product (GRP). Additionally, this spending generates a combined tax revenue of $32,466,774 across federal, state, and county levels.

	Table 2: Overnight Visitor Impact				
	Employment	Personal Income	GRP	Output	Total Tax
Direct	1,528	$46,627,600	$77,795,863	$153,126,865	$22,632,820
Indirect	316	$14,656,405	$25,123,233	$53,437,617	$5,558,490
Induced	187	$9,592,431	$18,687,049	$31,567,762	$4,275,464
	2,031	$70,876,436	$121,606,145	$238,132,244	$32,466,774

Daytripper Impact

The economic impact of this tourism spending supports 1,990 jobs, generating $69,462,521 in labor income and contributing $119,180,225 to the Gross Regional Product (GRP). Additionally, this spending generates a combined tax revenue of $31,819,094 at the federal, state, and county levels.

	Table 3: Daytripper Impact				
	Employment	Personal Income	GRP	Output	Total Tax
Direct	1,497	$45,697,426	$76,243,914	$150,072,138	$22,181,318
Indirect	310	$14,364,024	$24,622,050	$52,371,591	$5,447,603
Induced	183	$9,401,071	$18,314,261	$30,938,017	$4,190,173
	1,990	$69,462,521	$119,180,225	$233,381,746	$31,819,094

Seasonal Resident Impact

The economic impact of this tourism spending supports 4,220 jobs, generating $147,301,864 in labor income and contributing $252,732,968 to the Gross Regional Product (GRP). Additionally, this spending generates a combined tax revenue of $67,475,406 at the federal, state, and county levels.

	Table 4: Seasonal Resident Impact				
	Employment	Personal Income	GRP	Output	Total Tax
Direct	3,175	$96,905,725	$161,682,449	$318,242,198	$47,037,588
Indirect	657	$30,460,276	$52,213,392	$111,058,923	$11,552,159
Induced	388	$19,935,863	$38,837,127	$65,606,999	$8,885,659
	4,220	$147,301,864	$252,732,968	$494,908,120	$67,475,406

Visitor Estimates

Researchers at the UWF Haas Center utilized a third-party proprietary software application to estimate the number of GPS-enabled devices in a given location, de-duplicate the devices, and separate the visitors, from the residents, and employees. Using this method, the team estimated that Pensacola Beach hosted 965,400 visitors who stayed for 150 minutes or longer between January 1, 2024, and December 1, 2024. In comparison, the same period in 2023 saw 987,300 unique visitors. This represents a 3.4 percent decrease in visitors from 2023 to 2024, a 7.1 percent decline from 2022, and an 8.9 percent decline from 2021.