



Resident Satisfaction Survey

City of Pensacola

October 23, 2023



Haas Center

UNIVERSITY *of* WEST FLORIDA

Executive Summary

The city of Pensacola is a thriving community in Northwest Florida that boasts waterfront real estate, as well as beautiful parks and recreation areas. As Pensacola continues to grow and evolve, city leaders monitor resident perceptions through the annual resident satisfaction survey. This year's survey instrument was modified from previous years' surveys.

Key Takeaways:

- More than two-thirds of participating residents reported the city is moving in the right direction. About the same number of respondents, 68 percent, viewed downtown Pensacola as a crucial economic driver.
- Respondents were split when asked about their willingness to pay an additional cost for weekly recycling services.
- About 45 percent of participants were satisfied or very satisfied with the City's efforts to promote the city's image, while 35 percent remained neutral.
- Access to waterfront is the #1 thing participants love most about living in the City of Pensacola.
- When asked about additional amenities, residents prioritized increased access to water in downtown and additional outdoor recreation options.
- When asked to consider the top two priorities for current city initiatives, respondents chose to reduce homelessness and to decrease crime.
- Participants rated Aviation and Aerospace as the business sector likely to bring the most job growth to the area.
- Regarding public safety, 52 percent of respondents listed gun violence as their top concern.

Sampling Procedures

Under the leadership of Mayor Reeves, the team at city hall continues to monitor residents’ opinions and preferences through the annual resident satisfaction survey conducted by the Haas Center. The data in the following report represents a statistically significant, robust sample of Pensacola, Florida residents. Results show that 2,428 individuals started the survey. Of that number, 1,931 indicated they are 18+ and reside within the city limits. Researchers weighted those results by gender and race, but the total number of responses varies by question.

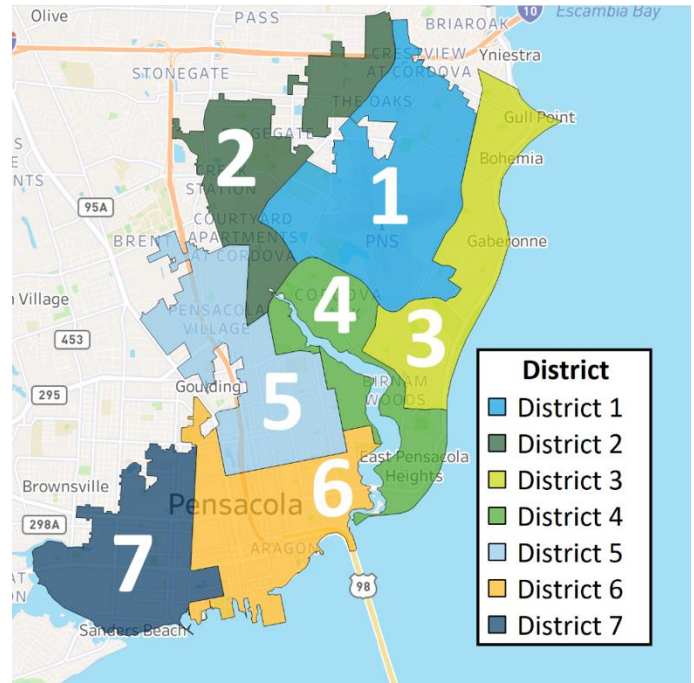


TABLE 1: District Summary Source: DemographicsNow

| District Population | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
|---|------------|-----------|------------|------------|------------|------------|-----------|
| Total Population | 7,799 | 7,633 | 8,011 | 7,549 | 8,564 | 7,362 | 7,745 |
| Total Households | 3,366 | 3,607 | 3,487 | 3,557 | 3,647 | 3,622 | 3,415 |
| Population Age 25+ | 5,878 | 5,584 | 6,035 | 5,780 | 6,019 | 5,662 | 5,428 |
| Race/Ethnicity | | | | | | | |
| White | 83.3% | 66.7% | 87.4% | 85.8% | 36.8% | 64.3% | 32.4% |
| Black | 8.9% | 23.0% | 5.9% | 8.7% | 58.8% | 30.8% | 60.8% |
| Am. Indian or Alaska Native | 0.7% | 0.7% | 0.4% | 0.6% | 0.4% | 0.4% | 0.7% |
| Asian/Native Hawaiian/ Other Pacific Islander | 3.3% | 3.7% | 2.7% | 2.3% | 1.0% | 1.6% | 1.8% |
| Some Other Race | 0.9% | 2.4% | 0.6% | 0.4% | 0.3% | 0.6% | 1.0% |
| Two or More Races | 3.0% | 3.5% | 3.1% | 2.2% | 2.7% | 2.3% | 3.3% |
| Hispanic | 4.8% | 7.2% | 4.7% | 3.3% | 2.5% | 3.4% | 3.6% |
| Not Hispanic or Latino | 95.2% | 92.8% | 95.3% | 96.7% | 97.5% | 96.6% | 96.4% |
| Gender Identity | | | | | | | |
| Male | 46.4% | 47.4% | 47.3% | 46.4% | 46.1% | 49.2% | 45.3% |
| Female | 53.6% | 52.6% | 52.7% | 53.6% | 53.9% | 50.8% | 54.7% |
| Economic Background | | | | | | | |
| Average Household Income | \$80,785 | \$65,685 | \$117,883 | \$107,744 | \$60,326 | \$82,648 | \$50,036 |
| Median Household Income | \$62,108 | \$44,138 | \$81,043 | \$73,638 | \$39,378 | \$51,262 | \$29,356 |
| Per Capita Income | \$35,060 | \$30,431 | \$51,486 | \$49,272 | \$26,026 | \$41,067 | \$22,397 |
| Percent of Weighted Respondents | 13% | 7% | 15% | 21% | 11% | 26% | 8% |

Figure 2: How long have you lived in Pensacola?

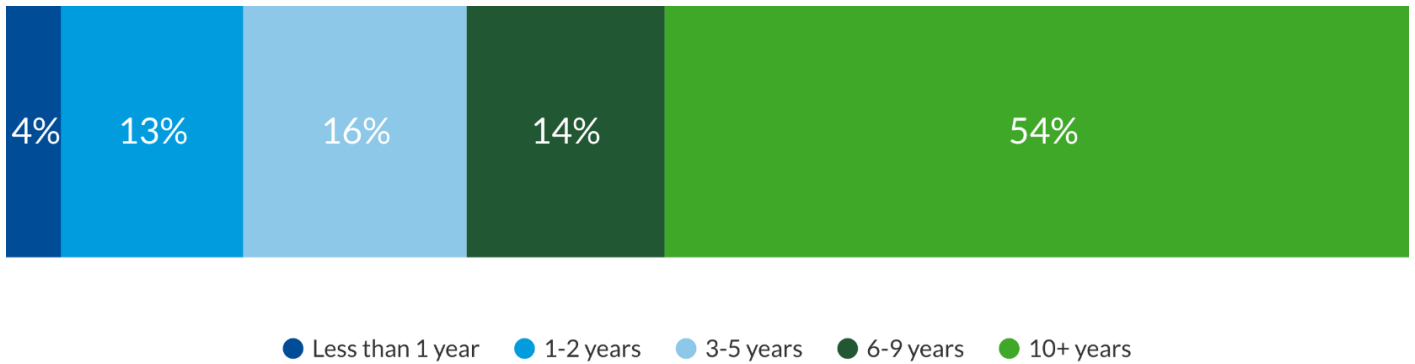
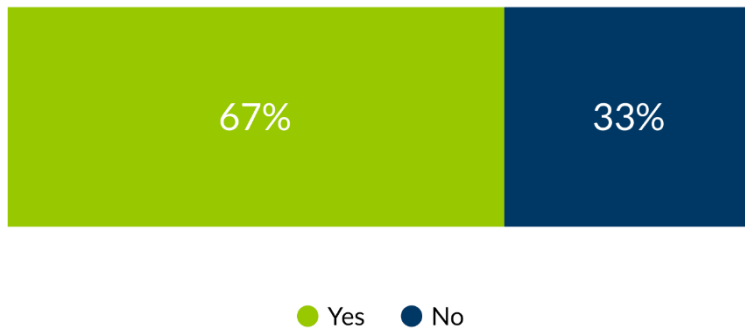


Figure 3: Do you feel the city is going in the right direction?

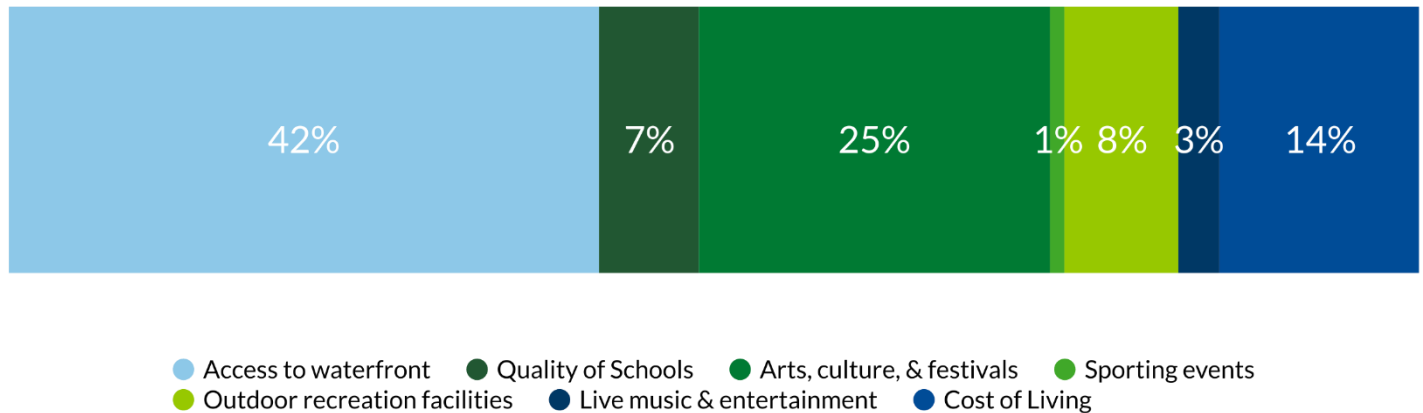


Results

Approximately 67 percent of residents felt the city was going in the right direction, as shown in Figure 3. Looking at responses across demographic variables, researchers found that individuals between the ages of 65 and 74 are more likely to agree the city is moving in the right direction as are residents who earn more than \$100,000 per year.

City leaders sought to identify how long respondents have lived within the city limits (Figure 2). Fifty-four percent of participants have lived in the city 10 or more years. A range of 3 to 5 years was a distant second, with 16 percent of participants. Only 4 percent of respondents reported living in Pensacola less than one year.

Figure 4: What do you love most about living in the City of Pensacola?



When researchers asked residents what they loved most about living in the City of Pensacola, access to waterfront was by far the top response with 42 percent. As Figure 4 shows, about 25 percent indicated arts, culture and festivals were what they loved most, followed by 14 percent of participants citing the cost of living as their favorite thing about living in the City of Pensacola.

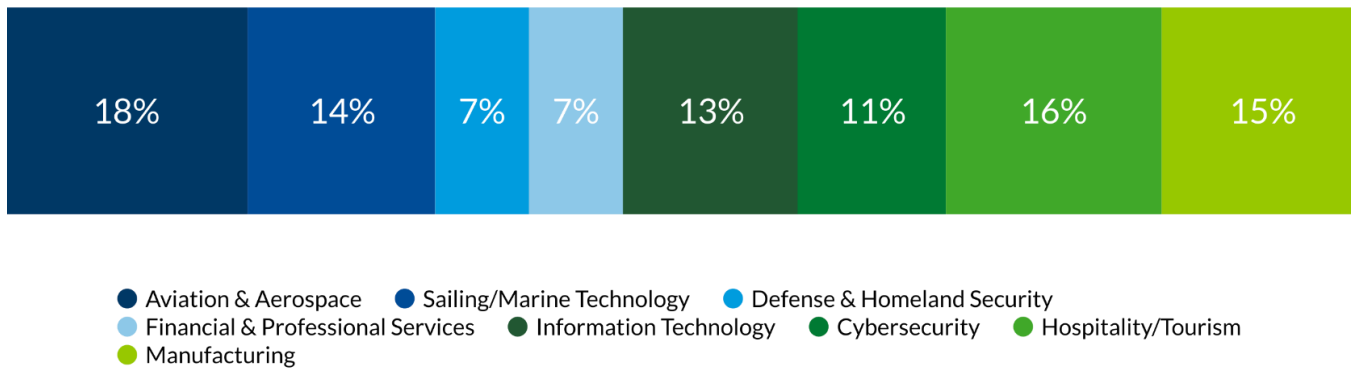
Communities rich in amenities are more desirable places to live. Pensacola offers a wide variety of cultural, economic and recreational activities. Participants were given a list of amenities and asked to pick their first and second choice in order to help City officials gauge which ones might be most important to residents. Out of seven choices, the most desired amenity was increased interaction with or access to water in downtown, with this option chosen by 28 percent of participants as their first pick and 23 percent as their second pick. This comes as no surprise considering 42 percent of participants indicated that access to waterfront was what they loved most about living in the city of Pensacola.

Table 2 shows that more outdoor recreation options represent the second most desired amenity, with 19 percent choosing this as their first pick and 23 percent as their second pick. Sixteen percent of respondents chose new entertainment venues as their first and second selections. A full-service hotel was the least desired amenity, with only 4 percent of participants selecting this as their first choice and 5 percent as their second choice.

Table 2: When thinking about additional amenities you would like to have in Pensacola, which would be your TOP choice? (Follow up - Second Choice)

| | First | Second |
|--|-------|--------|
| Full-service hotel | 4% | 5% |
| Greater variety of restaurants/bars | 13% | 14% |
| More outdoor recreation options | 19% | 23% |
| Downtown conference center | 10% | 10% |
| Increased interaction with/access to the water in downtown | 28% | 23% |
| New entertainment venues | 16% | 16% |
| Renovated sports arena | 10% | 9% |

Figure 5: In your opinion, which business sector would bring the most job growth to Pensacola?



Business growth and job growth are two important indicators of success for any city. Surveyors asked residents which business sector they believed would have the most positive impact on job growth in Pensacola. As shown in Figure 5, about 18 percent felt that aviation and aerospace would bring the most job growth to Pensacola, while 16 percent believed hospitality/tourism would be the best option, followed by 15 percent that thought manufacturing would bring the most growth. The top three sectors are outlined in the following section.

Aviation & Aerospace

It is no secret that the Northwest Florida coast is known for its aviation and aerospace programs. There are several military bases within reach, an international airport and top aerospace employers like ST Engineering. These are just a few reasons why Pensacola is a hot spot for the aviation and aerospace industry.

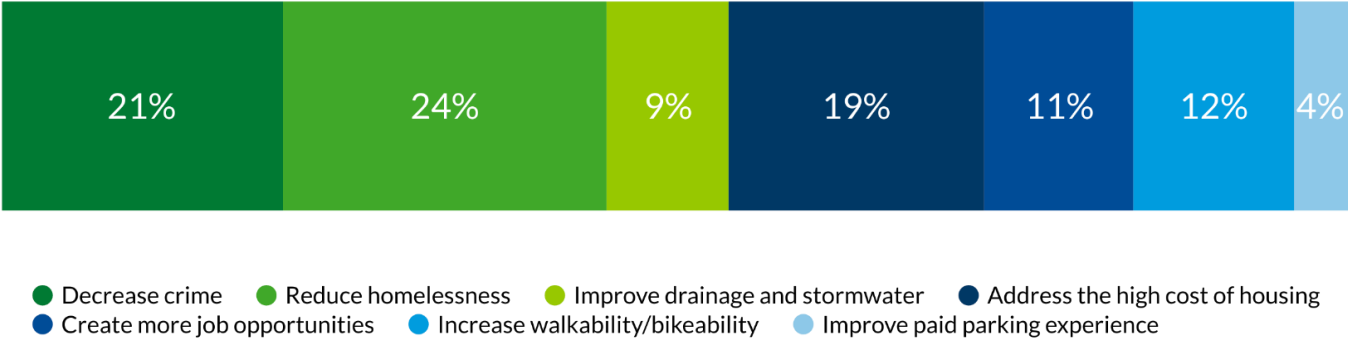
Hospitality

Hospitality and tourism was a close second, with 16 percent of respondents having selected this option. Hospitality, falling under the accommodation and food service industry, is the third largest industry in jobs provided, and fourth for industry growth within the city limits. Though respondents indicated a full-service hotel was their least preferred amenity, at least 10 percent indicated that they wanted a greater variety of restaurants and bars, and 16 percent indicated they wanted more entertainment venues.

Manufacturing

Manufacturing contributes to wage growth for residents. While job growth is below the national average, manufacturing remains a high paying industry with a large contribution to GRP. Technical advances make this industry an attractive proposition for individuals seeking careers with highly automated employers, like GE Vernova.

Figure 6: When thinking about current city initiatives, please choose your top 2 priorities.



City leaders are aware of residents’ top concerns, and wanted to understand how respondents prioritize these initiatives. Participants were asked to consider current city initiatives and to choose their top two priorities. Figure 6 shows the prioritized initiatives. Twenty-four percent of participants indicated their top initiative for the city was to reduce homelessness. According to a report from Substance Abuse and Mental Health Services Administration (SAMHSA), mental health crises can leave individuals feeling like they have nowhere to turn, despite many mental health resources being available in the city. Often, chronically homeless individuals deal with mental health or physical health concerns that are not always within their control, such as addiction and chronic illness.¹ Twenty-one percent of respondents chose to decrease crime as their second priority.

¹ [Behavioral Health Services for People Who Are Homeless](#)

Downtown Pensacola is a bustling hub for business activity and tourism. Downtown boasts many sites and attractions from the trendy Palafox cafes and restaurants to Historic Pensacola Village. When asked how participants felt about downtown, 68 percent indicated that it is a crucial economic, tourism and place-making driver as the leading tax generator of the city, seen in Figure 7.

Figure 7: How do you view downtown Pensacola?



When asked to consider public safety in the city, participants, for the most part, felt that public safety remained the same. Figure 8 shows that while 46 percent of respondents neither agreed nor disagreed that neighborhood safety had improved, 28 percent either agreed or strongly agreed that improvements were made from the previous year. However, violent crime was an exception, and 43 percent of participants either disagreed or strongly disagreed that violent crime had improved. In fact, only 19 percent of participants either agreed or strongly agreed that improvements were made in the areas of non-violent crime and violent crime.

Figure 8: When thinking about public safety in the city, how strongly do you disagree or agree with the following statements? Over the past year, the City of Pensacola has improved:

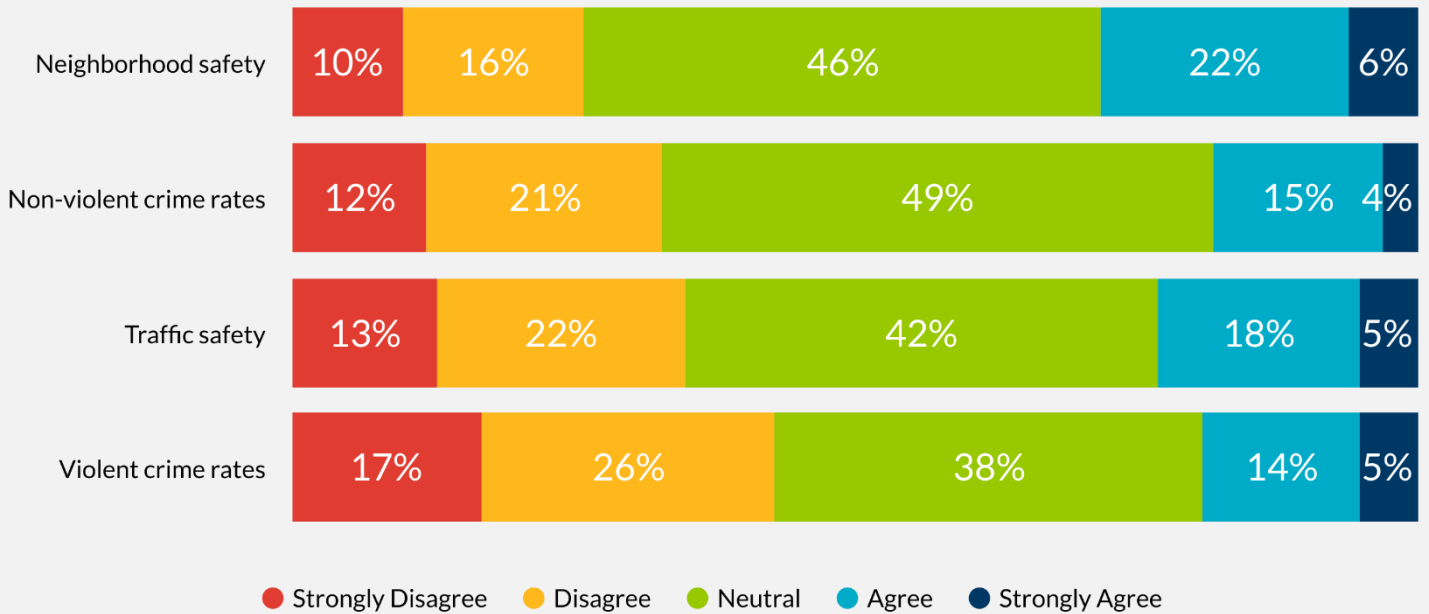


Figure 9: In regard to public safety, what is your top concern?

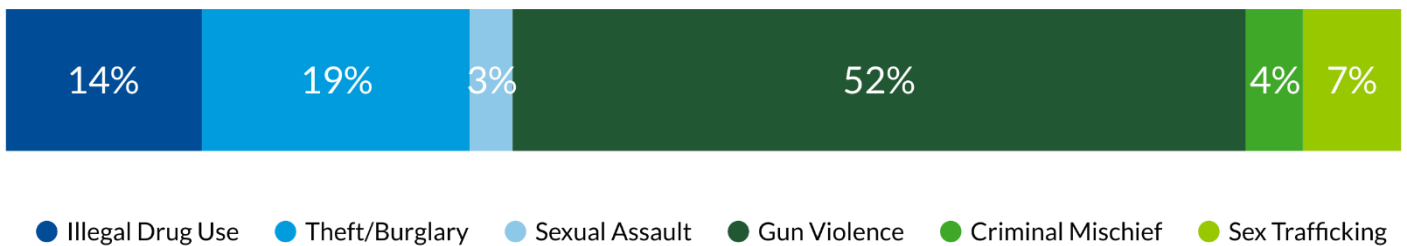
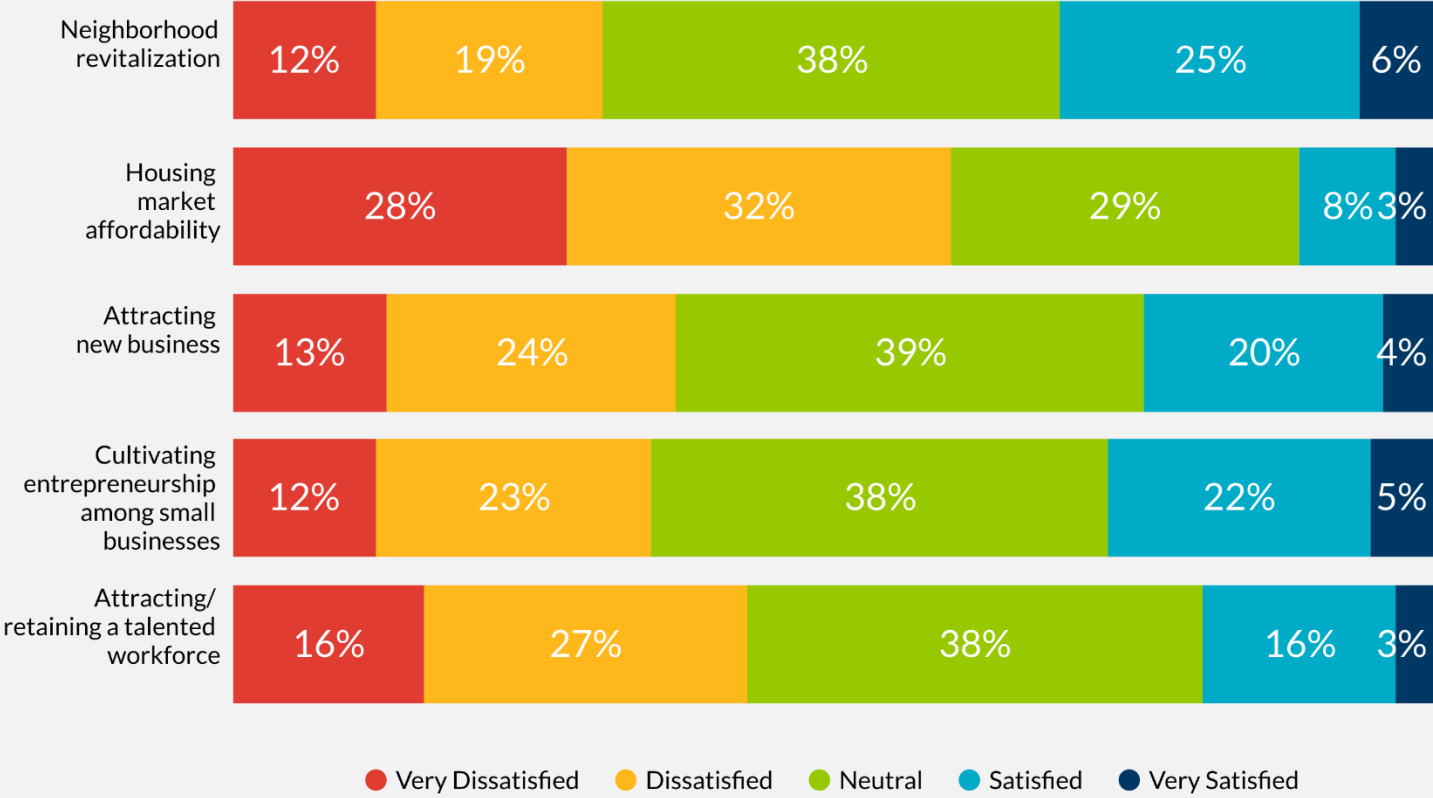


Figure 9 shows participants’ top concerns in regard to public safety. Fifty-two percent of respondents indicated gun violence was their top public safety concern. This was distantly followed by theft/burglary with 19 percent and illegal drug use at 14 percent. Only 3 percent of participants indicated sexual assault was a top concern, with 4 percent being most concerned over criminal mischief.

Residents were asked to consider efforts made to improve the City of Pensacola over the last year then rate how satisfied they were with the city’s progress on a scale from 1 to 5, with 1 being very dissatisfied and 5 being very satisfied. Nearly 40 percent of participants were neutral regarding the city’s efforts to improve neighborhood revitalization, attracting new business, cultivating entrepreneurship among small businesses, and

attracting/retaining a talented workforce, as shown in Figure 10. Neighborhood revitalization had the highest percentage of respondents report being satisfied or very satisfied, with 31 percent. With the exception of housing market affordability, in which 60 percent of respondents reported being either very dissatisfied or dissatisfied, participants were mostly satisfied or neutral with the city’s efforts to make improvements in these areas.

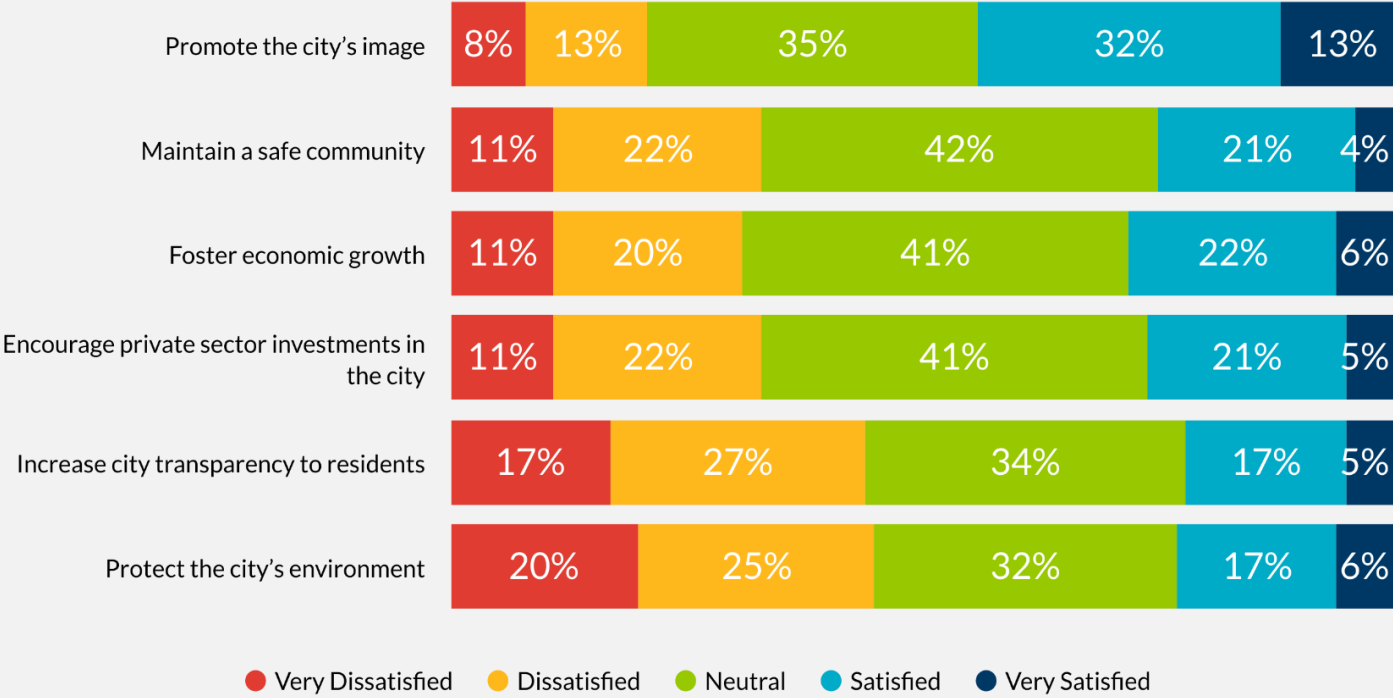
Figure 10: When thinking about efforts to improve the City of Pensacola over the past year, how satisfied are you with:



Residents were asked to rate the City of Pensacola’s performance in several other key categories. As shown in Figure 11, promoting the city’s image performed the best overall, with 45 percent of participants indicating they were either satisfied or very satisfied and another 35 percent remained neutral. Foster economic growth was the category rated the next highest with 28 percent of participants being satisfied or very satisfied. Around 40 percent of respondents reported being neither dissatisfied nor satisfied with the city’s efforts to maintain a safe community, foster economic growth, or encourage private sector investment in the city. Participants were most dissatisfied with the City of

Pensacola’s efforts to protect the city’s environment, with 45 percent reporting to be either dissatisfied or very dissatisfied, and increase city transparency to residents, with 44 percent of respondents either dissatisfied or very dissatisfied.

Figure 11: Please rate the City of Pensacola’s performance in the following key categories. Over the past year, how satisfied were you with the city’s efforts to:



When residents were asked about infrastructure and their neighborhood, the results were relatively favorable, as shown in Figure 12 (next page). About 69 percent of respondents agreed that the city provided quality fire services, and about 58 percent agreed or strongly agreed the city provided quality police services. The category related to drainage and stormwater was the biggest point of contention, with 43 percent of participants indicating they disagreed or strongly disagreed the City made improvements in this area. A third, or more, participants remained somewhat neutral across several variables including improved street lighting, improved sidewalks, enforced building and property codes, and coordinated needs of neighborhood associations.

Figure 12: When thinking about the City's infrastructure and your neighborhood, how strongly do you disagree or agree?

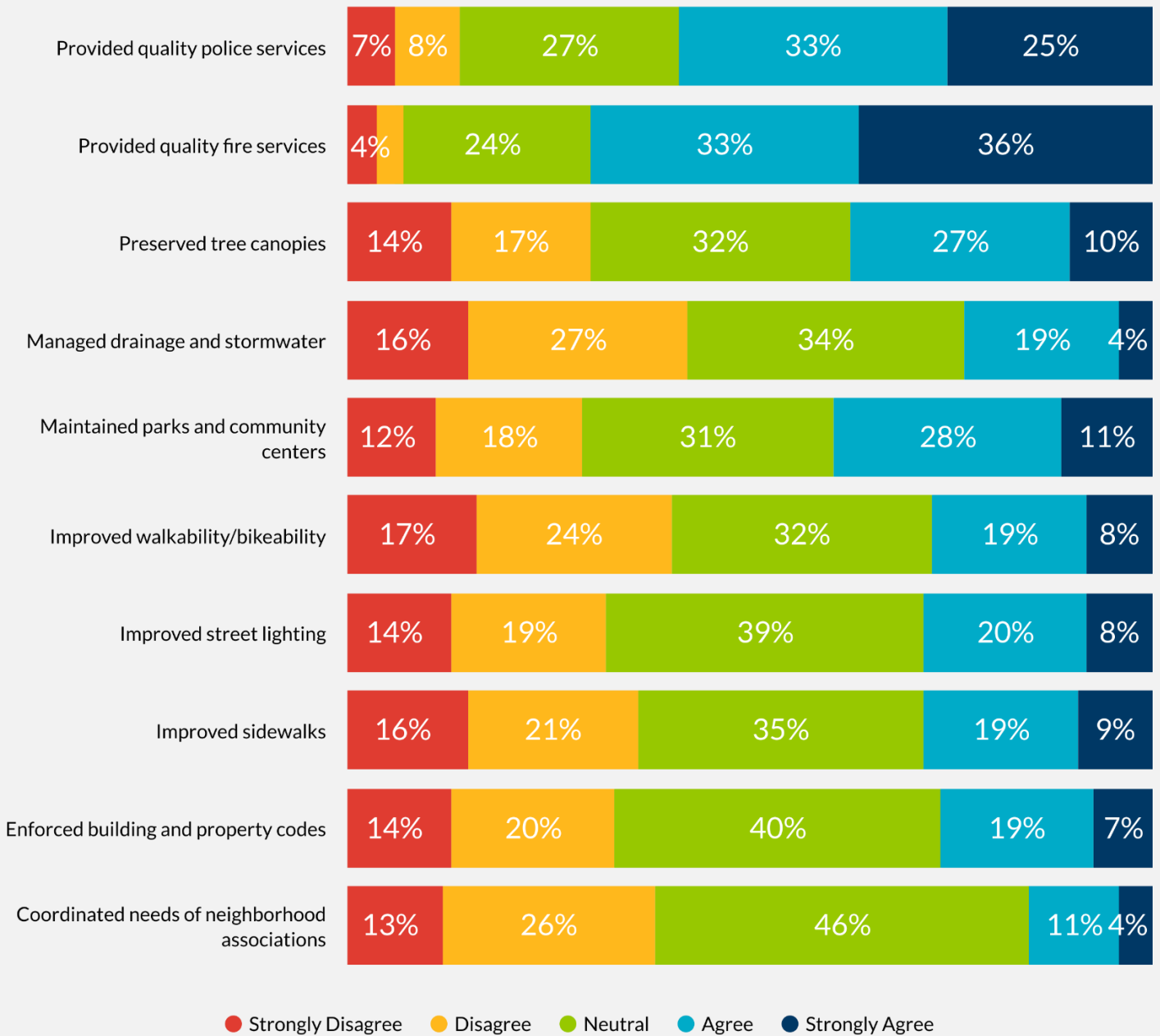
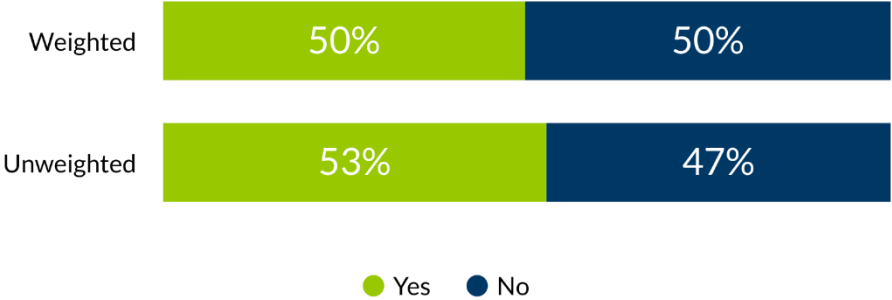


Figure 13 depicts the weighted and unweighted responses related to recycling. When residents were asked if they would be willing to pay an additional \$8-\$10 per month if inflation and rising operational costs meant that the city could only provide weekly recycling to customers who paid the additional fee, half of the residents said they would pay an additional cost for weekly recycling. The unweighted results slightly favored the additional fee in order to keep their recycling services, with 53 percent willing to pay the additional fee.

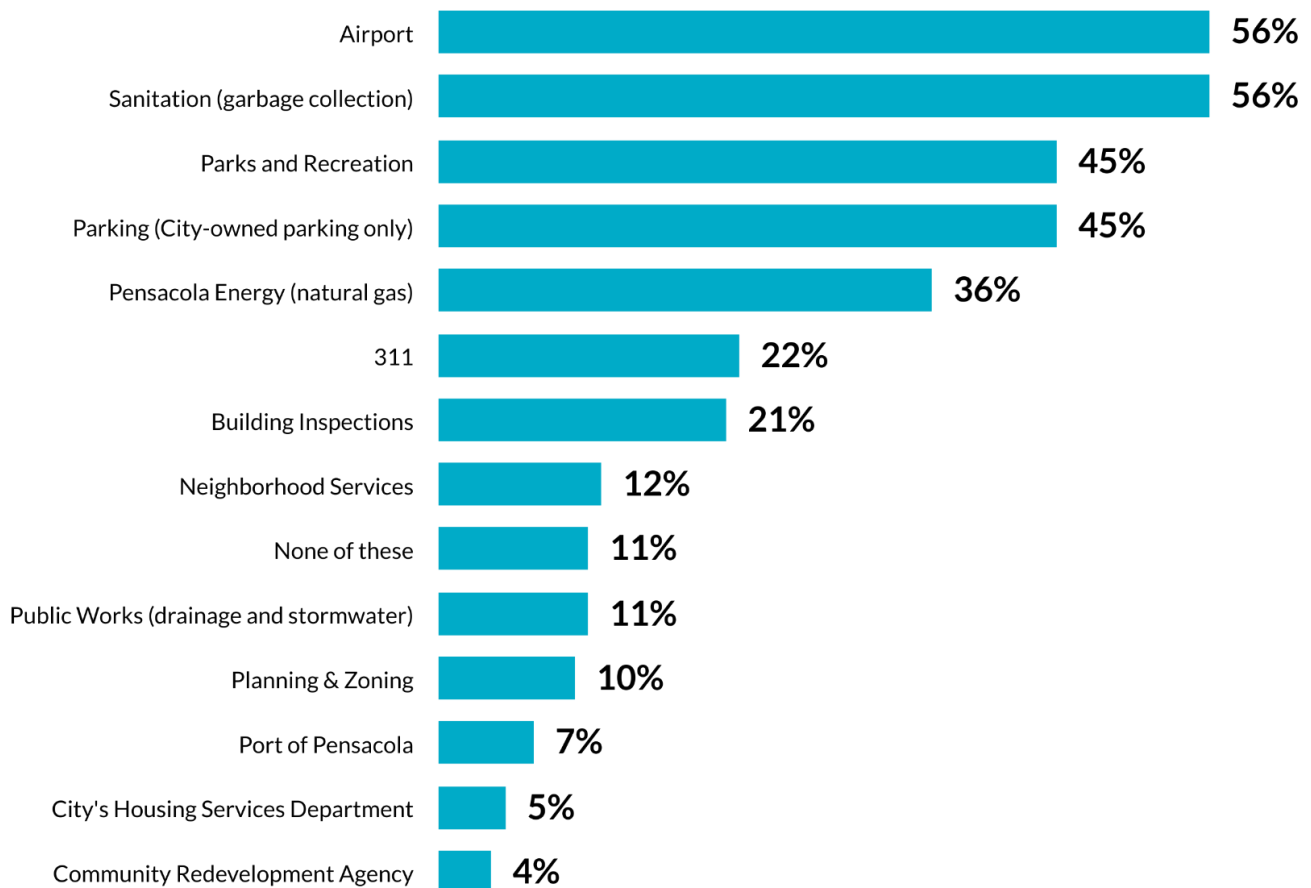
Figure 13: If inflation and rising operational costs means that the city could only provide weekly recycling to customers who paid an additional \$8-\$10 per month, would you pay the additional fee for the service?



Digging into the data, researchers found that residents who have lived in Pensacola for 10 or more years are less likely to indicate a willingness to pay an additional fee for recycling. Individuals who earn more than \$100K are more likely to respond favorably to the new fee. Responses from residents between the ages of 35 and 44 indicate a greater willingness to pay more to recycle and lastly, District 6 residents are more willing to pay a new fee.

Residents were asked which departments, if any, they interacted with over the past year. Figure 14 shows that Airport and Sanitation departments had the most interaction, with 56 percent of residents having interacted with each department. Parks and Recreation and Parking were next, each with 45 percent of respondents having interacted with them over the past year. Thirty-six percent of respondents interacted with Pensacola Energy, rounding out the top five departments with the most interaction. Community Redevelopment Agency and City of Pensacola’s Housing Services Department had the least interaction, with 4 and 5 percent, respectively.

Figure 14: Which of the following city offices did you interact with over the past year?



Participants were then asked to rate each department with which they interacted on their customer service, with one star being “very poor” customer service and five stars being “excellent” customer service. As shown in Figure 15 on the next page, the Airport received the highest customer service ratings with 81 percent of participants awarding them either 4 or 5 stars. Pensacola Energy and Port of Pensacola followed closely. Seventy-six percent of respondents rated Pensacola Energy’s customer service either 4 or 5 stars, while 74 percent rated the Port of Pensacola 4 or 5 stars for their customer service. While only 5 percent of participants interacted with the City’s Housing Services Department, 41 percent of those participants gave the department 1 or 2 stars in customer service.

Figure 15: Please rate each City department on its customer service, with five stars being “excellent” customer service and one star being “very poor” customer service.

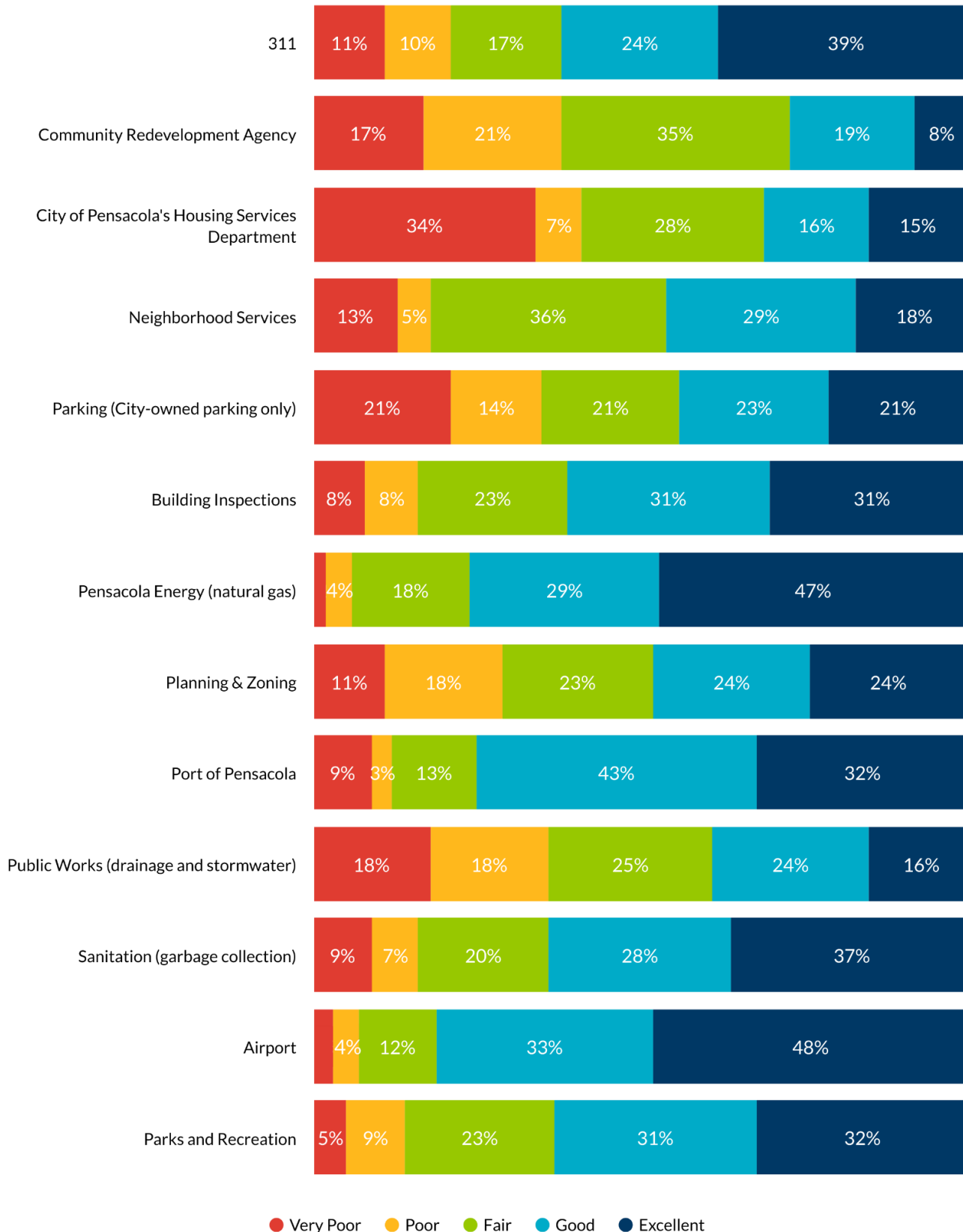
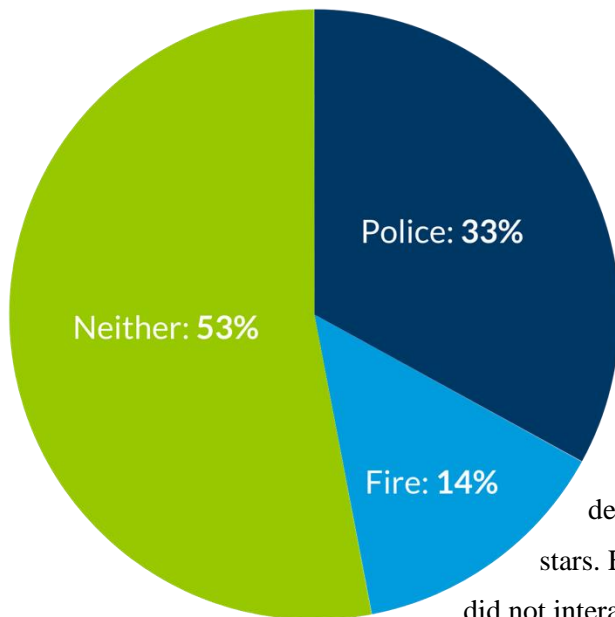


Figure 16: Have you interacted with the City's Public Safety Services during the past year?



This year researchers separated out the City’s Public Safety Services from other city departments, then asked residents if they interacted with Pensacola Police, Pensacola Fire, or neither over the last year. If a participant indicated they interacted with one of the City’s Public Safety Services, we asked how they interacted with that department, then asked them to rate that department on customer service, using one to five stars. Figure 16 shows that 53 percent of participants did not interact with Pensacola Police or Pensacola Fire.

Thirty-three percent interacted with Pensacola Police, while only 14 percent of participants interacted with Pensacola Fire.

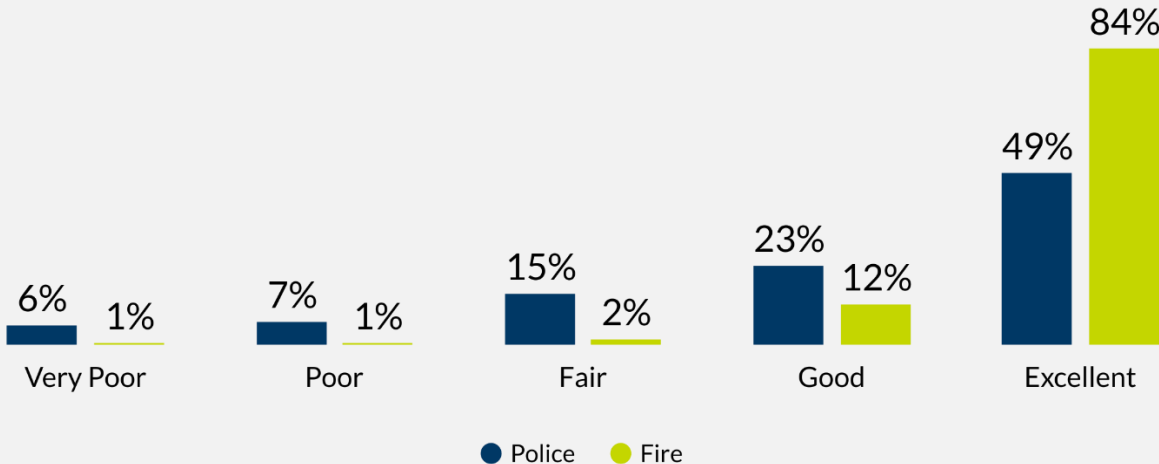
How participants interacted with these public safety groups is reported in Figure 17. Forty-seven percent interacted with these public safety groups during a community gathering or festival or in public, while 43 percent of participants called for service or interacted with these groups during an emergency. To identify ways that residents interacted with these two groups, we ran crosstabs of the department by method of engagement. On average, participants more frequently had a public interaction with Pensacola Police, rather than called for service or an emergency. On the other hand, more respondents stated they called Pensacola Fire for emergency services, rather than experienced a public interaction.

Figure 17: How did you interact with them? Choose all that apply.



Individuals were also prompted about the customer service ratings for these departments, and the results are shown in Figure 18. Pensacola Fire Department averaged 5 stars, with 96 percent of participants rating their customer service either 4 or 5 stars. Pensacola Police Department averaged 4 stars, with 72 percent of respondents rating their customer service either 4 or 5 stars. While Pensacola Fire Department scored a higher customer service rating, participants rated both departments favorably.

Figure 18: Please rate the City's Public Safety Service department on its customer service, with five stars being "excellent" customer service and one star being "very poor" customer service.



We asked residents how they currently receive information about the City of Pensacola and how they prefer to receive information about the City of Pensacola. Figure 19 provides a side-by-side view of participants' current and preferred methods for receiving information. Both questions allowed participants to choose multiple methods of communication, therefore, percentages will not equal 100. Almost two-thirds of participants receive information about the City of Pensacola via social media, and over half prefer to use social media to receive their information. Half of respondents utilize the City of Pensacola website to obtain information, while 40 percent indicated the website was a preferred method. While 39 percent of participants would prefer to receive information through City of Pensacola text or email, only 17 percent currently receive information through text or email. City Council Meetings or Mayor's Town Hall Meetings were the least preferred or utilized channel for receiving city information, aside from "other," where participants could write in sources we had not identified.

Figure 19: Where do you receive information about the City of Pensacola? Where do you prefer to receive city info? Choose all that apply.

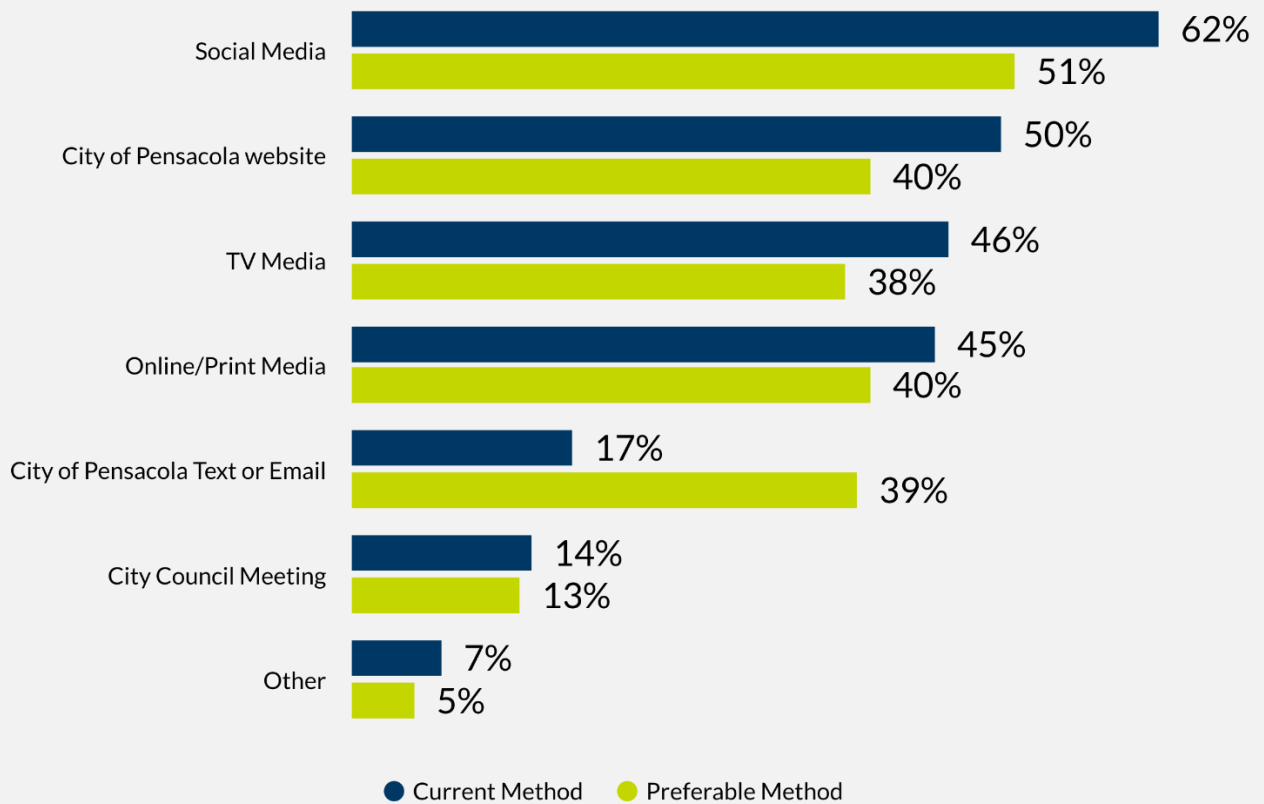
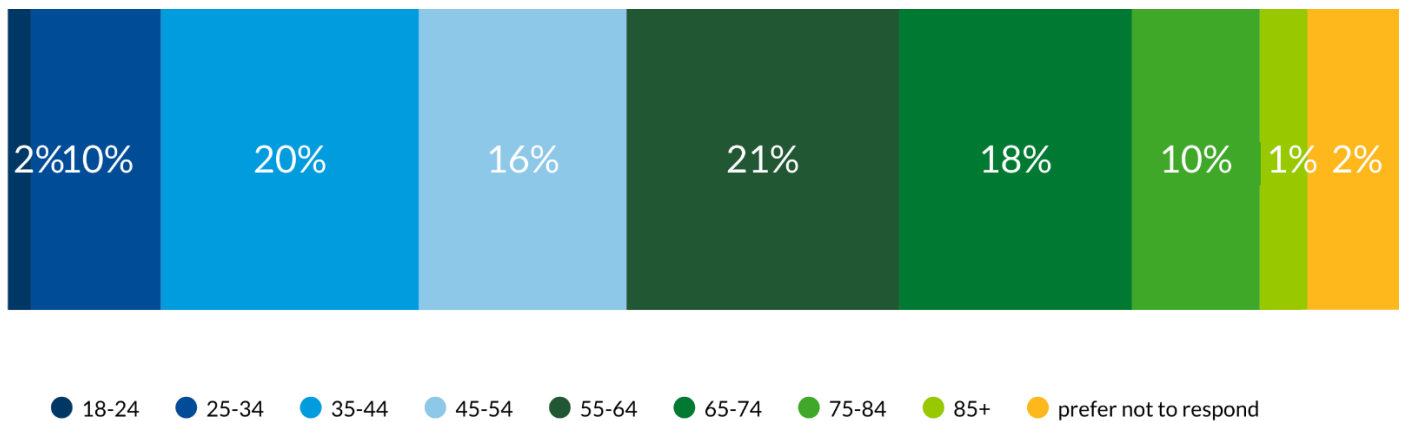


Figure 20: What age group do you belong to?



In the last section of the survey, residents were asked demographic questions for statistical purposes only. Participants were asked to choose their age range, which is displayed in Figure 20. Seniors participated at a rate of 31 percent and individuals between 45 and 64 represent 37 percent of responses.

The survey was weighted by gender and race. In the unweighted sample, female respondents represented 55 percent of participants, with male participation comprising 40 percent of responses. The remaining 5 percent identified as other or preferred not to respond. Race was another demographic used to weight the sample. More white individuals provided responses to the survey than black individuals, though racial representation was important for statistically significant results. Another demographic factor was Hispanic, Spanish or Latin descent. Most of the respondents indicated they were not of Hispanic, Latino or Spanish descent (93 percent) – again consistent with the population of the city.

The researchers asked residents their individual annual income and 32 percent of the surveyed group reported annual earnings of \$100,000 or more, with another 14 percent of participants reporting their annual income to be between \$75,000 and \$99,999. The second largest group of respondents, 17 percent, reported annual earnings of between \$50,000 and \$74,999. However, another 17 percent chose not to disclose their income information. An astonishing 96 percent reported being registered voters. Two percent of respondents were not registered to vote, and an additional 2 percent preferred not to respond.

Conclusion

The 2023 City of Pensacola Resident Satisfaction Survey offers information on the opinions, preferences, and concerns of the City's residents. This poll was designed to determine perceptions about many areas of city life, such as services, infrastructure, public safety, economic growth, and community investment. Waterfront access and a thriving downtown are two of the many reasons the city retains residents.

Two-thirds of participants expressed optimism regarding the direction the city is headed, while the other third was less satisfied. Well-regarded public safety services and waterfront access are some of the many reasons why residents cherish living in the City. The majority of respondents agree the City's downtown area drives the economy within the City's limits. Many residents recognize that greater access to the waterfront and more entertainment would be economically and culturally advantageous. While public safety is a concern for participants (specifically gun violence and theft), reducing homelessness and the high cost of the housing market are among the top issues.