



Visit Jacksonville

Resident Opinion Study
November 2024 - March 2025

Introduction

Objective:

- To understand Duval County residents' perceptions of tourism in the county

The insights in this report can be used to understand the community's support for tourism and adapt communications to bolster that support.

Methodology:

- **408 survey responses** were collected over the course of the study
 - **134** via intercept interviews in downtown Jacksonville, Riverside/Avondale, Jacksonville Beaches/Mayport, San Marco, and Murray Hill from November 2024 – January 2025
 - **274** online from November 2024 – March 2025
- To ensure a representative sample, data was weighted to reflect the U.S. Census Bureau's data on age, race, gender, income, and county subdivision in Duval County



Key Takeaways



Key Takeaways

Many Duval County residents believe tourism has a positive influence on both them individually and on their community.

- Even before learning about the economic benefits of tourism, over 3 times as many residents had a positive attitude toward tourism in Duval County compared to those with a negative attitude on the topic
- Nearly 2 in 3 residents believed tourism should play a significant or dominant role in the Duval County economy
- Similarly, nearly 9 in 10 residents supported efforts to attract more tourists to Duval County in order to enhance the county's economy
- Over 1 in 3 believed they personally benefit a significant amount or a lot from tourism

Key Takeaways

At the same time, there is room for residents to better understand the benefits of tourism.

- Nearly 9 in 10 Duval County residents noted that they interact with visitors in the community only sometimes, seldom, or never
 - Since there is limited interaction with tourists, Visit Jacksonville can have a greater influence as the voice of tourism in the area
- Nearly 1 in 4 residents reported a neutral attitude toward tourism in Duval County, revealing a lack of knowledge on the topic
- Over 2 in 5 residents believed they personally benefit from tourism only slightly or not at all
 - This is more than those stating they receive significant personal benefits from tourism

Key Takeaways

Learning about the economic benefits of tourism significantly moved the needle in residents' attitudes towards tourism.

Residents were given the following information on the economic benefits of tourism

“Visitors to Duval County supported 56,900 local jobs in FY2024 based on their spending in the area. Visitors’ spending and the taxes they paid saved each Duval County household \$540 in local taxes in FY2024.”

- The percent of residents with a positive attitude toward tourism increased by 27% points
- In addition, learning about the benefits of tourism cut the percent of those who felt neutrally about it in half
- And visitors with a somewhat negative attitude toward tourism dropped from 15% to 1%
- These changes are attributable to the second and third most important economic attributes for Duval County residents being (1) access to quality job opportunities and (2) living in a strong and diverse economy
- Ultimately, helping residents better understand the economic benefits of tourism

Key Takeaways

There is an opportunity for Visit Jacksonville to effectively communicate tourism's benefits to residents.

- Over 1 in 3 residents had not heard of Visit Jacksonville
- Another nearly 1 in 3 were unaware that it is funded from a fee visitors pay and not from resident taxes
 - These two points are important because the default assumption for most residents is that their tax dollars would be paying for the work done by Visit Jacksonville
- Partially due to lack of exposure to the organization, 1 in 4 residents were unsure how to rate Visit Jacksonville's performance in communicating tourism's benefits
- These findings, in combination with the improvement in residents' attitudes toward tourism after learning about its benefits, shows that the more residents can be exposed to Visit Jacksonville and what it does, the more positively they will feel about tourism in their community.

Residents struggle to see the benefits of tourism on certain areas of life that are important to them.

- The attribute of life in Duval County that **most positively influences residents' quality of life** (the thing that is both most important to residents, and with which they are most satisfied) is having **no state income tax**
- Other attributes have a positive influence on quality of life, though much less so than no state income tax:
 - Enjoying quality nature-based/outdoor activities
 - Having access to quality job opportunities
 - Living in a strong and diverse economy
- Additionally , residents largely perceive tourism to have the most positive influence on Duval County in the following areas:
 - Quality live sports
 - No state income taxes
 - Quality festivals and events

Key Takeaways

Residents may benefit from education specifically on how tourism benefits them in the ways that matter to them.

- Taken together, these findings show that residents have a good understanding of tourism's benefit to them through its influence on having no state income taxes and, to a lesser extent, on quality live sports in Duval County.
- However, residents struggle more to make the connection between tourism in Duval County and other aspects of life that are important to them, such as quality job opportunities.
- Visit Jacksonville can most strongly sway residents' attitudes in favor of tourism by drawing direct connections between tourism in Duval County and the elements of life there that most positively influence residents' quality of life.

Recommended Messaging to Residents

- First and foremost, when engaging with residents, Visit Jacksonville needs to remind residents of tourism's role in Florida residents not paying state income tax
- Based on the importance residents place on the economy and jobs, the economic benefits of tourism should also be a part of all outreach to residents
 - In addition, the results of this study have shown that this information can move the needle in terms of residents supporting tourism
- The following positive impacts of tourism are associated and will resonate with many residents:
 - Quality Live Sports
 - Quality Events & Festivals
 - Quality Nature/Outdoor Activities
- The following impacts are not as well understood in regard to tourism's impact and should be used less often in resident outreach:
 - Quality Shopping
 - Quality Restaurants
 - Diverse & Inclusive Community
 - Quality Cultural Options
 - Preservation of Environment

Detailed Findings

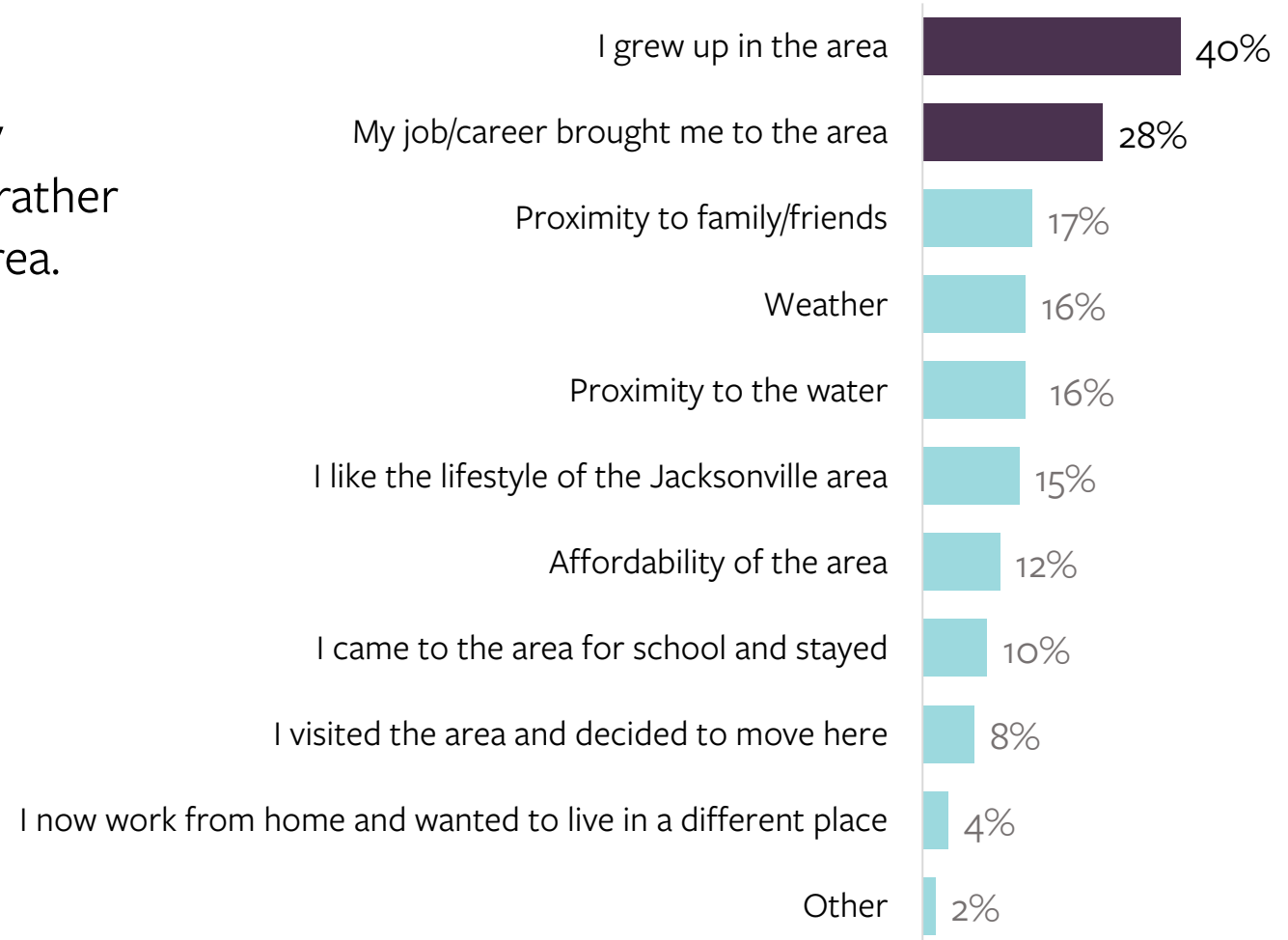


Reasons for Living in Duval County¹

Residents are most often in Duval County because something brought them there, rather than them seeking out residence in the area.

- 2 in 5 adult Duval County residents grew up in the area
- Another nearly 3 in 10 moved to the area for work

Reasons for Choosing to Live in Duval County

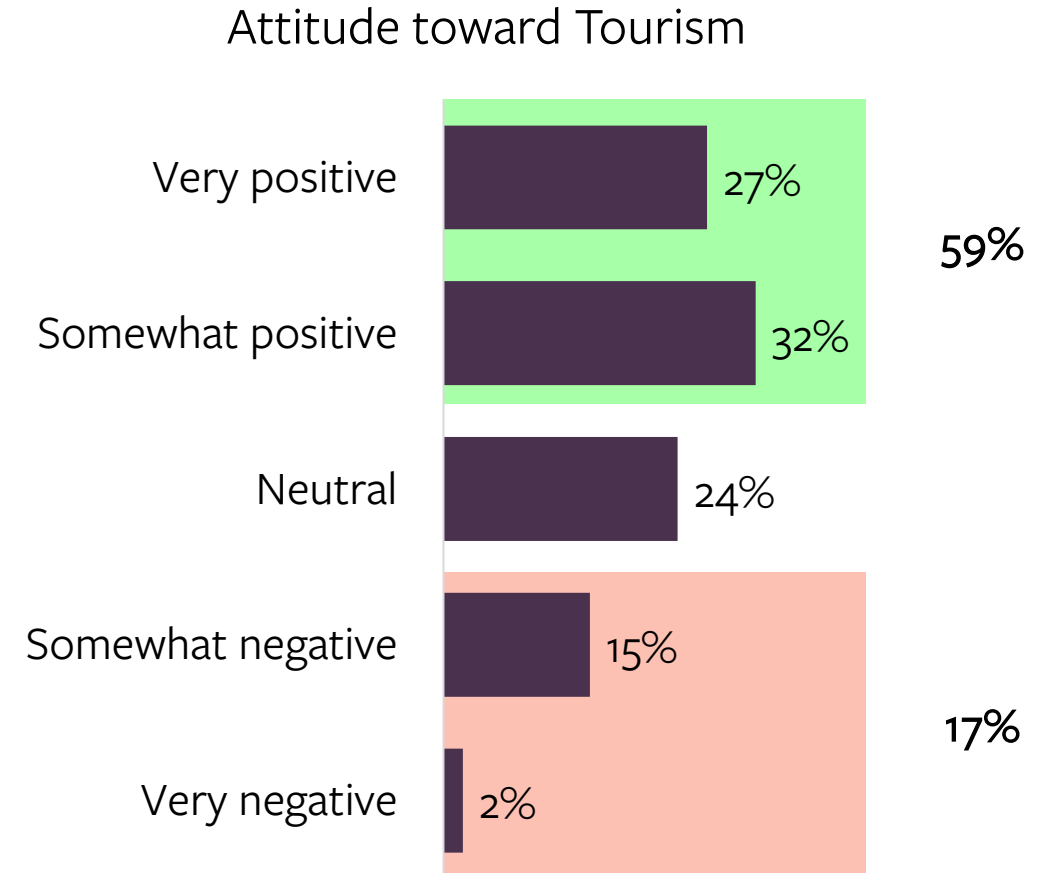


¹ What are your reasons for choosing to live in Duval County?
Multiple responses permitted.

Initial Attitude toward Tourism¹

While most residents felt positively about tourism in their community, many were neutral.

- Over 3 times as many residents had a positive initial attitude compared to a negative initial attitude toward tourism
- Nearly 1 in 4 were neutral toward tourism. These represent an opportunity for attitude change after presented with new information about the benefits of tourism.



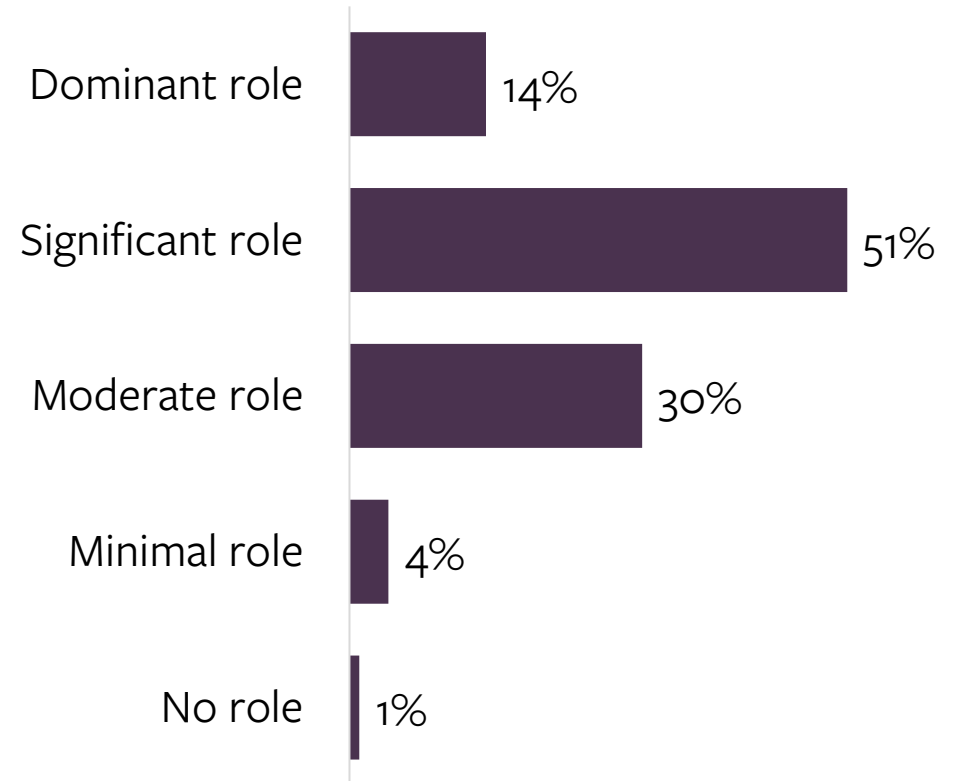
¹ My attitude towards tourism in Duval County is:

Tourism's Role¹

In addition to feeling positively about tourism in their community in general, most residents believed it should play some role in the local economy.

- Nearly 2 in 3 thought tourism should have a significant or dominant role in the economy
- Only 5% said it should play little to no role

Opinion on Tourism's Ideal Role in the Community



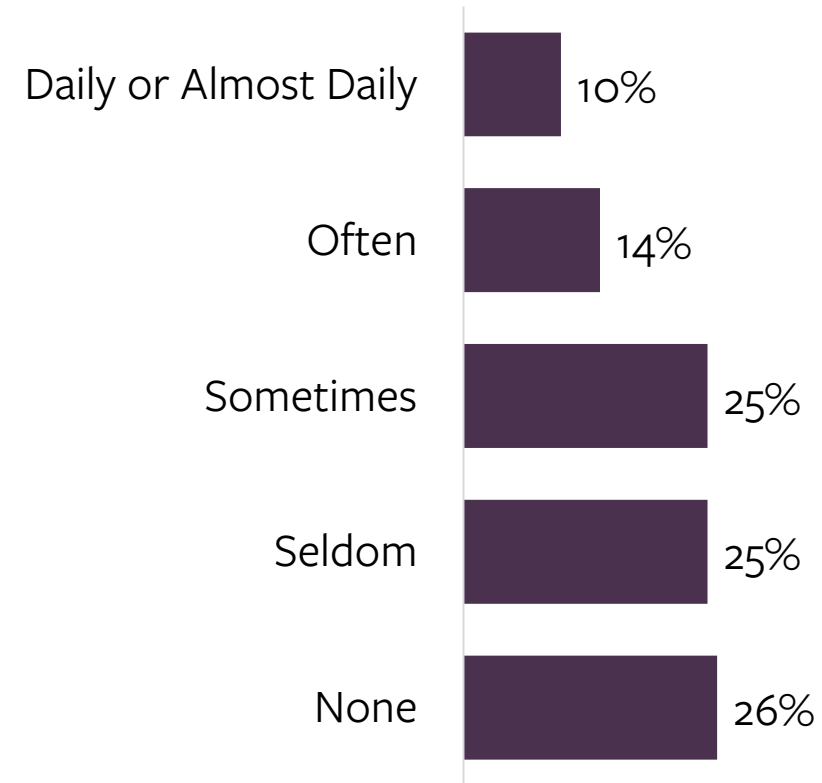
¹ In your opinion, what role should tourism have in the local economy?
1 = no role to 5 = dominant role

Interaction with Tourists¹

Residents and tourists don't interact much in the Duval County area.

- Only about a quarter of residents interact with tourists often or daily
- Another 1 in 4 never interact with tourists

Interaction with Tourists in the Community



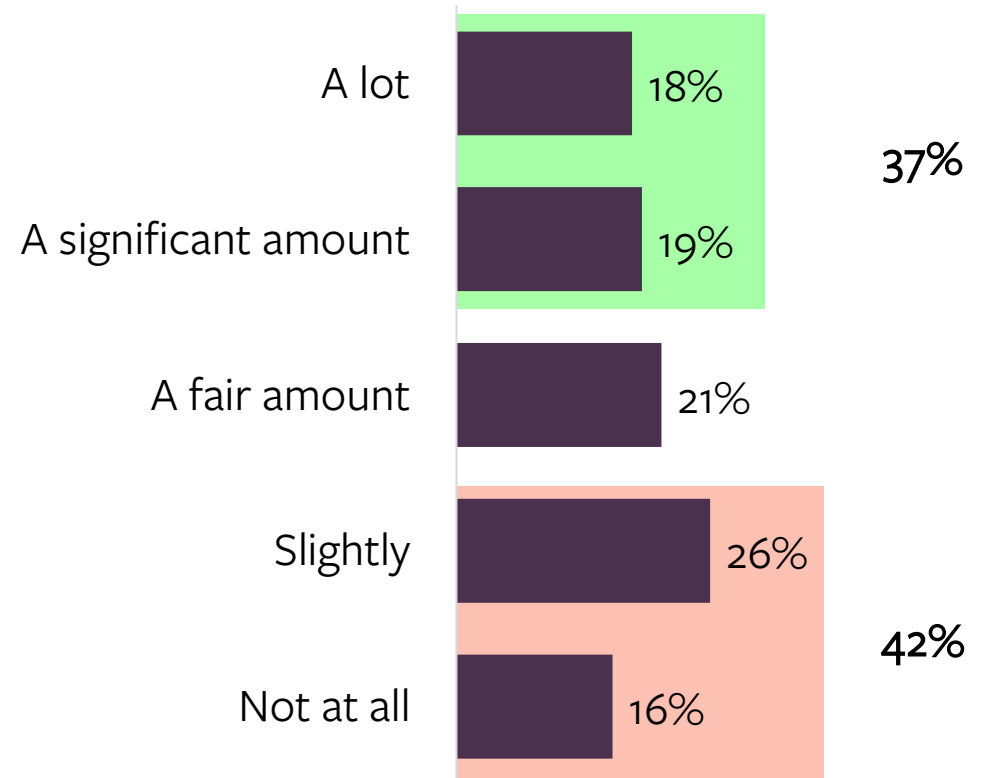
¹ How much INTERACTION do you have with tourists visiting your community?
1 = no INTERACTION at all to 5 = a large amount / a lot of INTERACTION

Tourism's Personal Benefits¹

Although most residents have a positive attitude toward tourism in general, they are more divided on the extent to which they feel it benefits them personally.

- Less than 2 in 5 residents feel it benefits them a significant amount or a lot
- More than 2 in 5 residents see little to no personal benefit from tourism

Perception of Personal Benefit from Tourism



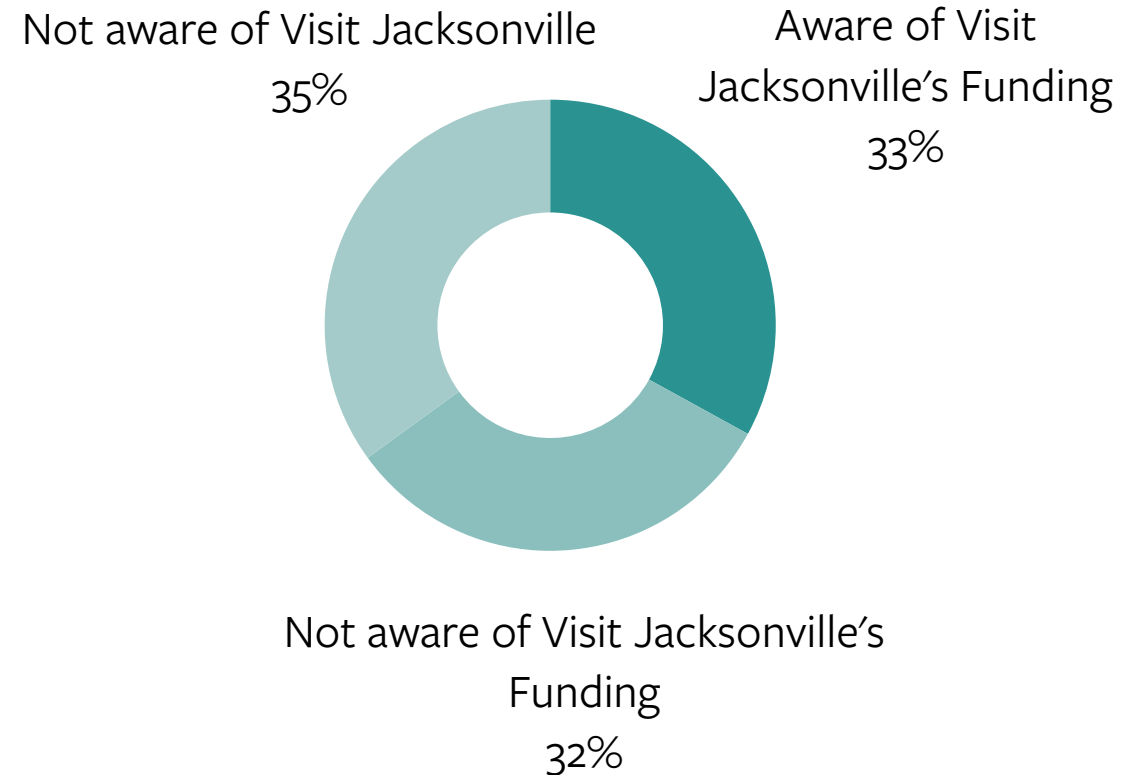
¹ How much do you feel you personally benefit from tourism?

Awareness of Visit Jacksonville's Funding¹

Duval County residents are divided in their awareness of Visit Jacksonville and of its funding source.

- Over 1 in 3 residents were unaware of Visit Jacksonville's existence
- Among those who knew of Visit Jacksonville, about half (33% of all residents) knew that it is funded from a fee visitors pay and not from resident taxes

Awareness of Visit Jacksonville's Funding



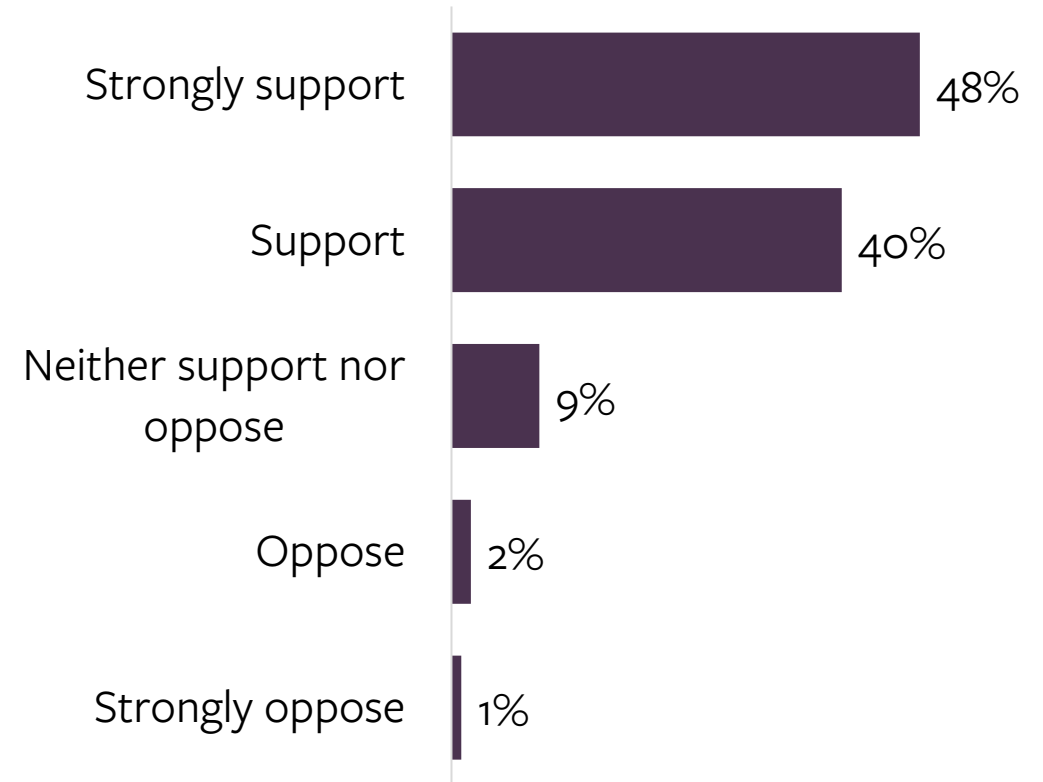
¹ Did you know that Visit Jacksonville is funded from a fee visitors pay when they stay six months or less at hotels, motels, vacation rentals, etc., and not funded by general taxes that you pay?

Support of Tourism¹

Just as most Duval County residents believe tourism should play a role in the local economy, most support attracting more tourists.

- Nearly 9 in 10 residents support efforts to enhance the county's economy by attracting tourists
- Only 3% of residents oppose these efforts

Opinion on Efforts to Attract Tourists



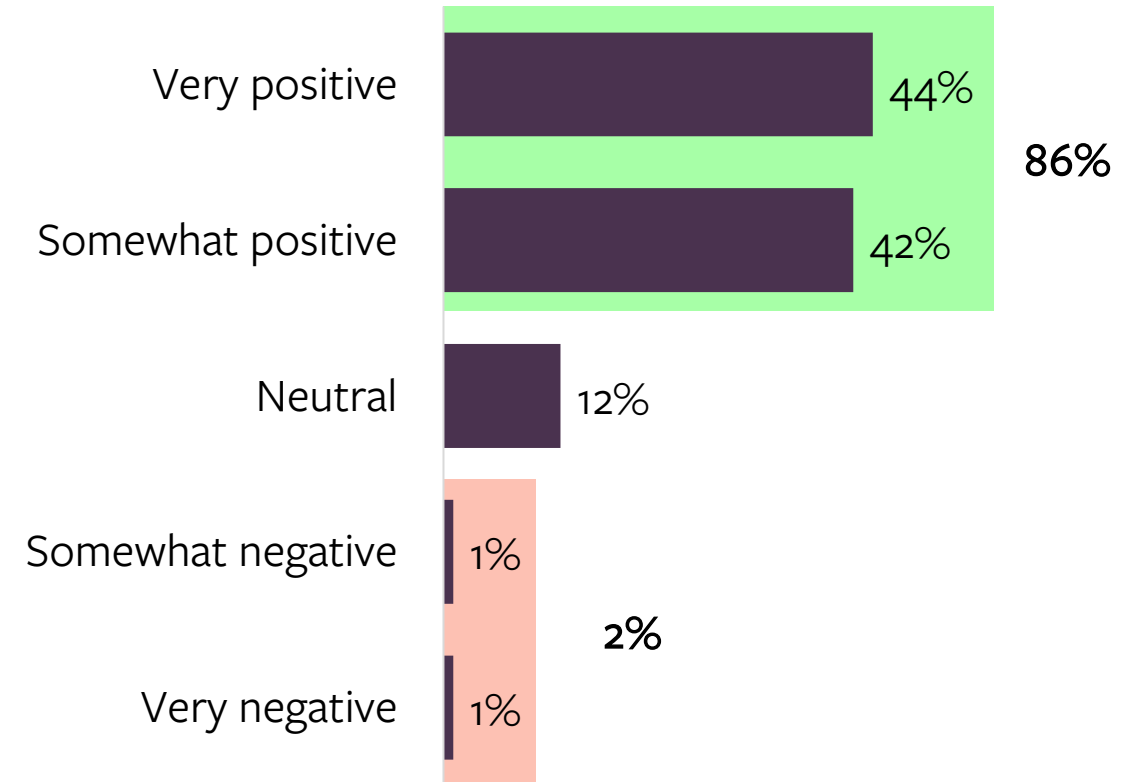
¹ Do you support or oppose efforts to enhance Duval County's economy by attracting more tourists?

Updated Attitude toward Tourism¹

After learning about the benefits of tourism for Duval County, nearly 46% more residents cited a positive attitude toward tourism.

- The percent of residents with a positive attitude toward tourism increased by 27%
- In addition, learning about the benefits of tourism cut the percent of those who felt neutrally about it in half (24% to 12%)
- And visitors with a somewhat negative attitude toward tourism dropped from 15% to 1%

Updated Attitude toward Tourism



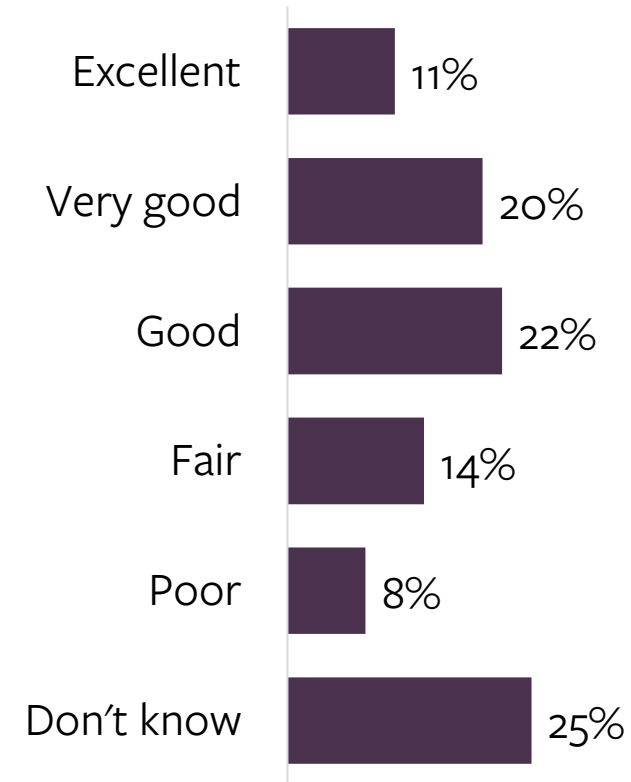
¹ Visitors to Duval County supported 56,900 local jobs in FY2024 based on their spending in the area. Visitors' spending and the taxes they paid saved each Duval County household \$540 in local taxes in FY2024. Given this information, is your attitude toward tourism in Duval County:

Communicating Tourism's Benefits¹

Duval County residents are divided on how well Visit Jacksonville communicates the benefits of tourism.

- A little over half of residents rated Visit Jacksonville's communication of these benefits as good to excellent
- Around 1 in 5 rated them fair or poor
- Nearly 1 in 4 were unsure how to rate Visit Jacksonville's performance, possibly because they were unaware of Visit Jacksonville until learning about it from this survey

Performance Ratings



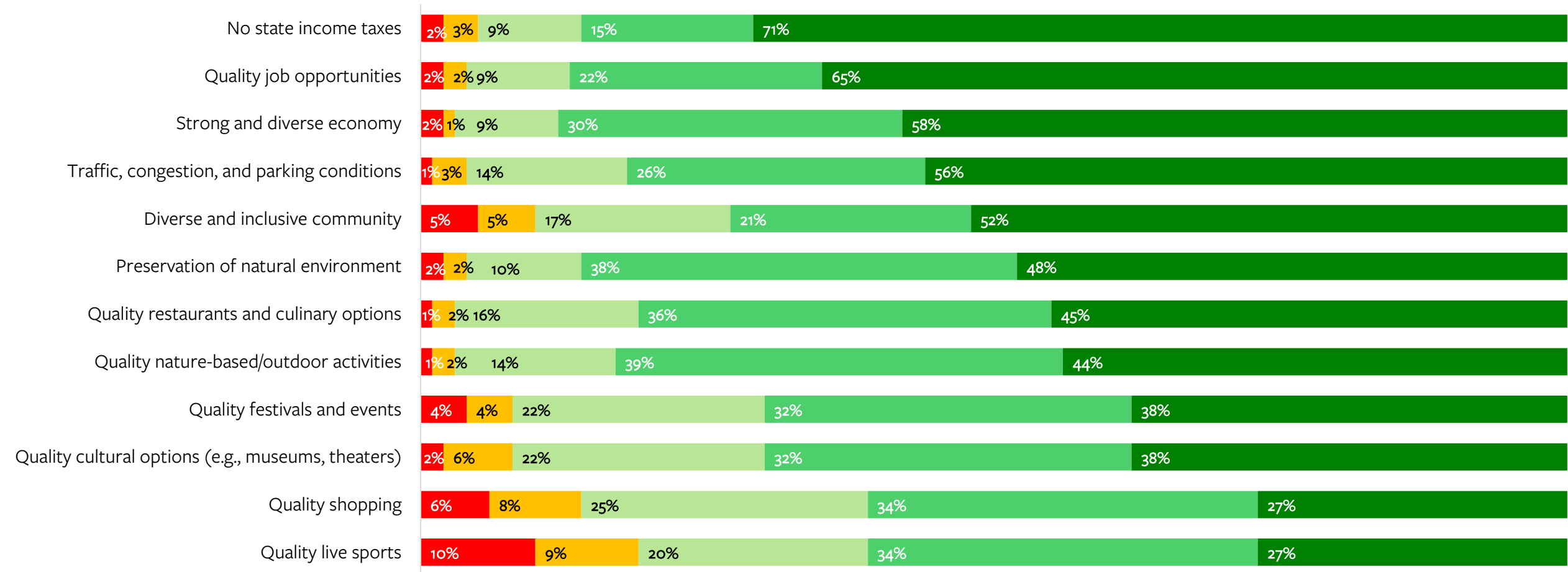
¹ How do you rate Visit Jacksonville's performance in communicating the benefits of tourism to residents of Duval County?

Quality-of-Life Indicators



Personal Importance Ratings¹

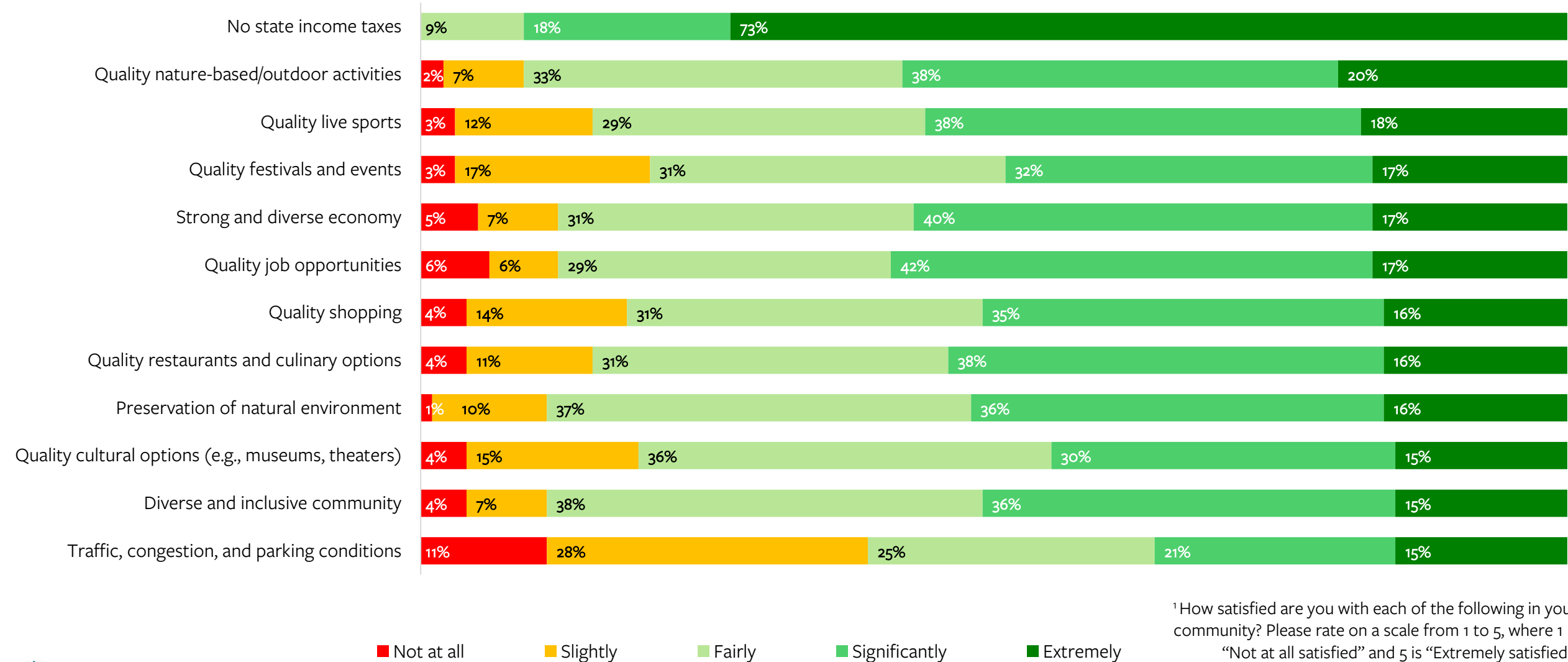
Personal Importance of Quality of Life Characteristics



¹ How important are each of the following to you personally? Please rate on a scale from 1 to 5, where 1 is “Not at all important” and 5 is “Extremely important”.

Personal Satisfaction Ratings¹

Satisfaction with Attributes of Quality of Life Characteristics



¹How satisfied are you with each of the following in your community? Please rate on a scale from 1 to 5, where 1 is "Not at all satisfied" and 5 is "Extremely satisfied".

Quality-of-Life Score¹ Explained

Scoring Explained

- Responding residents gave each category a score from 1 to 5 for importance and for satisfaction.
- These 25 scoring combinations all correspond to a Quality-of-Life Score.
- The full table is on the right. High importance and High satisfaction scores are at the top and High importance and Low satisfaction scores are at the bottom.

Responses

| Importance | Satisfaction | QOL Score |
|------------|--------------|-----------|
| 5 | 5 | 20 |
| 4 | 5 | 18 |
| 3 | 5 | 16 |
| 5 | 4 | 15 |
| 4 | 4 | 14 |
| 2 | 5 | 14 |
| 3 | 4 | 13 |
| 2 | 4 | 12 |
| 1 | 5 | 12 |
| 1 | 4 | 11 |
| 5 | 3 | 10 |
| 4 | 3 | 10 |
| 3 | 3 | 10 |
| 2 | 3 | 10 |
| 1 | 3 | 10 |

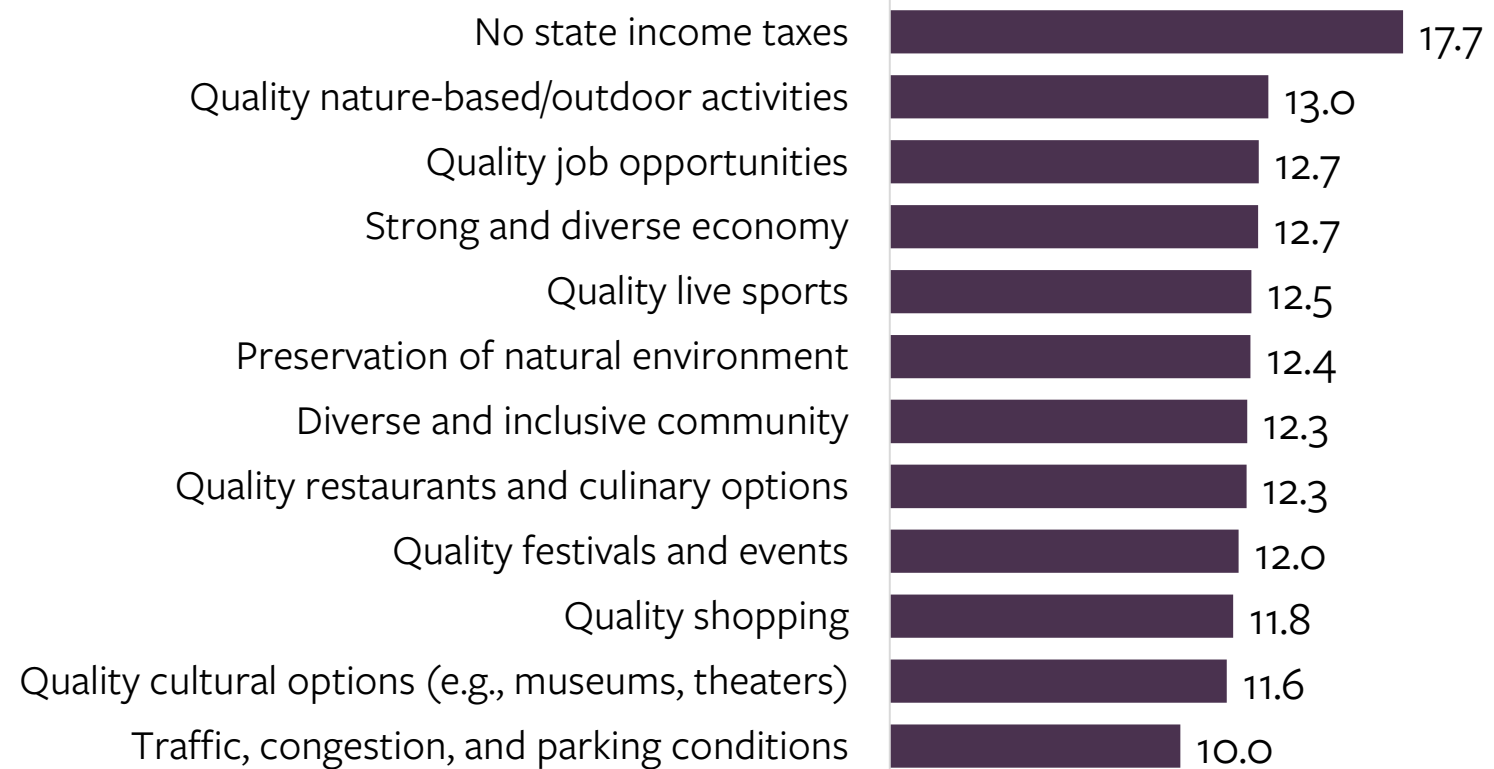
| Importance | Satisfaction | QOL Score |
|------------|--------------|-----------|
| 1 | 2 | 9 |
| 2 | 2 | 8 |
| 1 | 1 | 8 |
| 3 | 2 | 7 |
| 4 | 2 | 6 |
| 2 | 1 | 6 |
| 5 | 2 | 5 |
| 3 | 1 | 4 |
| 4 | 1 | 2 |
| 5 | 1 | 1 |

¹ Scoring combinations determined by researchers Andereck & Nyaupane (2011), who adapted their method of scoring from Brown, Raphael, & Renwick (1998).

Quality-of-Life Mean Scores¹

Resident Quality of Life on Each Attribute

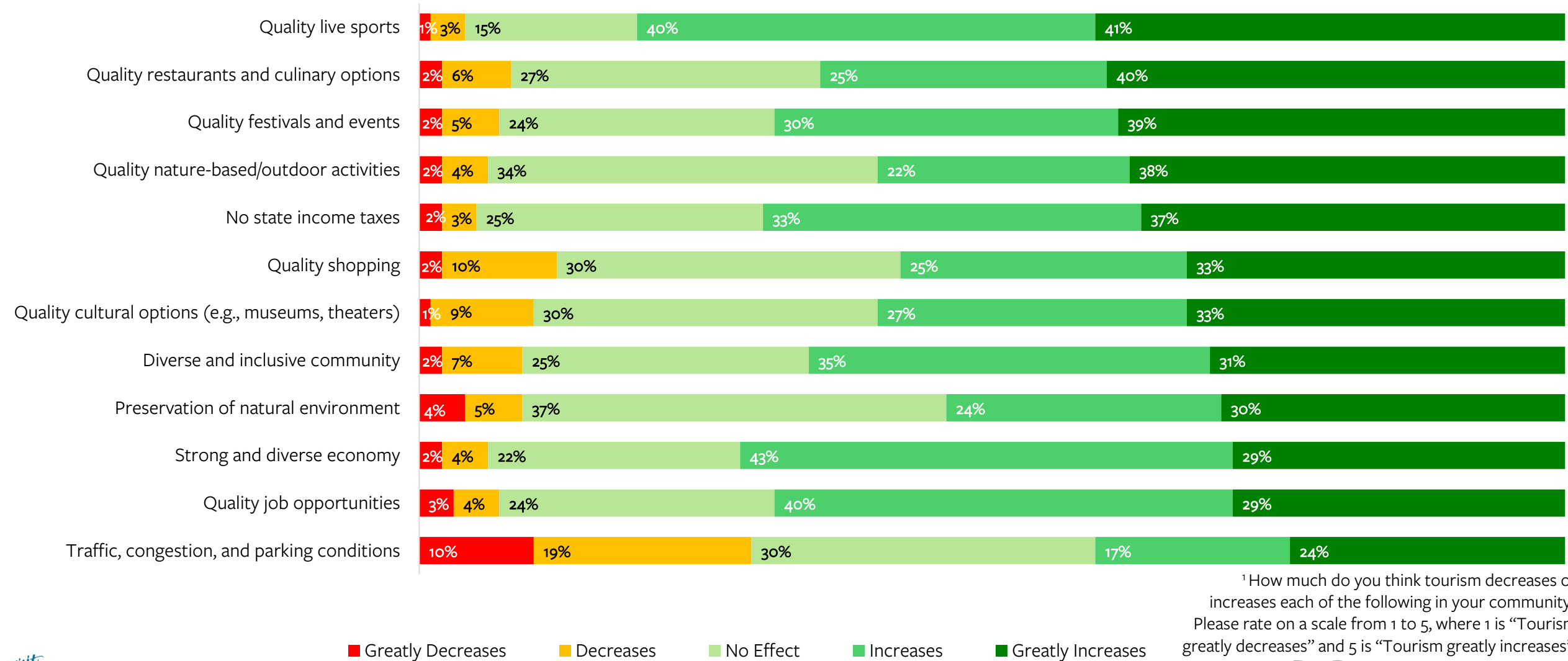
- Having **no state income taxes** is by far the attribute that **most strongly influences resident quality of life**
- These scores help us understand each attribute's effect on residents' quality of life
- Feeling satisfied with an attribute that is important to them enhances a person's quality of life



¹ Calculated using importance and satisfaction ratings, as described in Andereck & Nyaupane (2011), who adapted their method from Brown, Raphael, & Renwick (1998).

Tourism Effect Ratings¹

Tourism's Influence on Attributes of Duval County's Economy



¹ How much do you think tourism decreases or increases each of the following in your community? Please rate on a scale from 1 to 5, where 1 is "Tourism greatly decreases" and 5 is "Tourism greatly increases".

Tourism Effect Score¹ Explained

Scoring Explained

- Responding residents gave each category a score from 1 to 5 based on the impact they think tourism in Duval County has on that category, where 1 meant “greatly decreases,” 3 meant “no effect,” and 5 meant “greatly increases.”
- These ratings were then recoded into Tourism Effect scores which range from -3 to +3.

Example Responses

| Rating | Tourism Effect Score |
|--------|----------------------|
| 5 | +3 |
| 4 | +2 |
| 3 | +1 |
| 2 | -2 |
| 1 | -3 |

Tourism Effect Mean Scores¹

- Residents believe tourism has the strongest effect on quality live sports in Duval County, followed by having no state income taxes and having access to quality festivals and events

Tourism Effect for Each Attribute

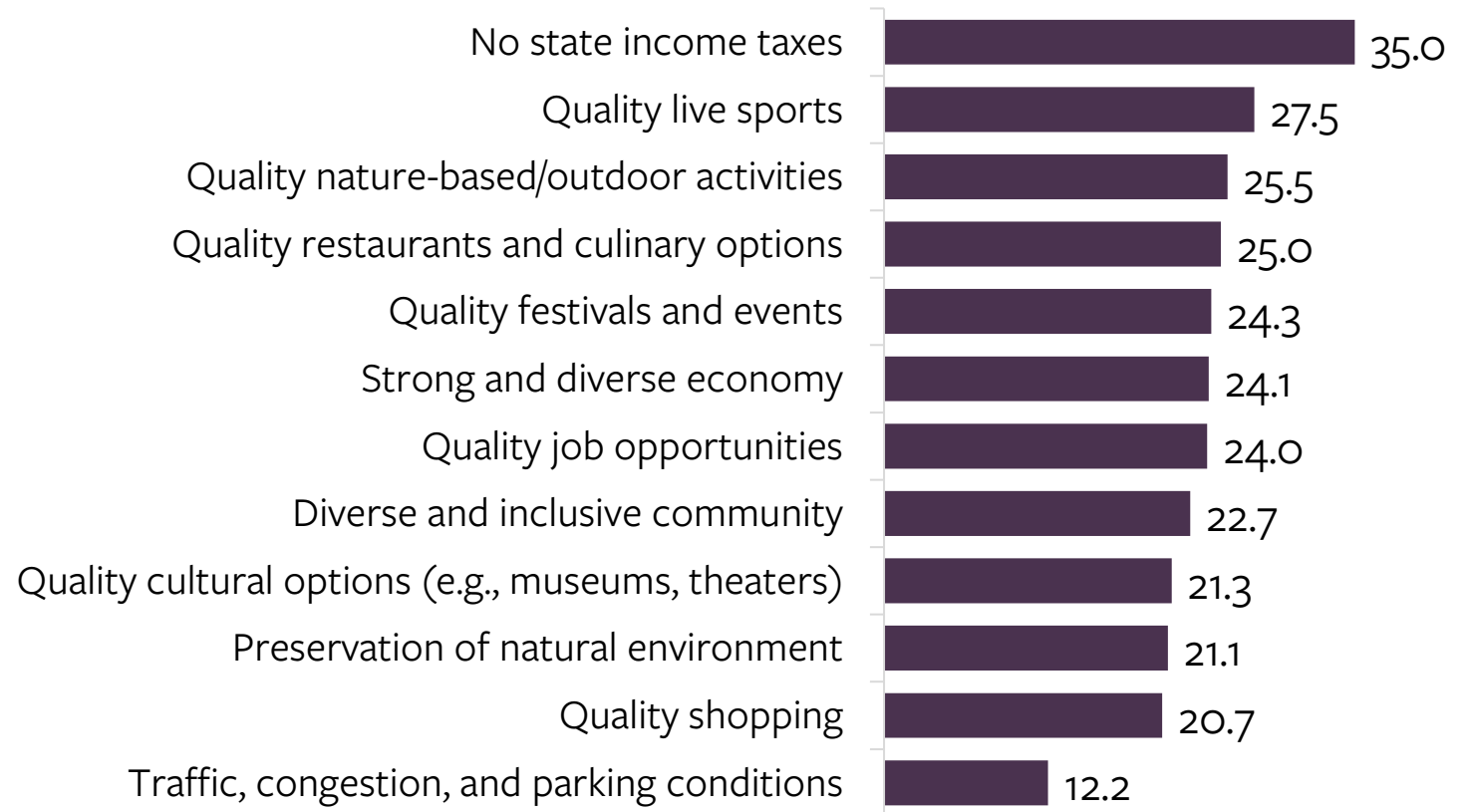


¹ Calculated by converting responses from a 5-point Likert scale as described in Andereck & Nyaupane (2011).

TQOL (Tourism x QOL) Mean Scores¹

- TQOL scores were calculated by multiplying QOL scores by the Tourism Effect score
- Tourism influences Duval County residents' quality of life through its effect on income taxes – significantly more than on any other attribute

Tourism Quality of Life for Each Attribute



¹ Calculated by multiplying the Tourism Effect and Quality of Life Scores together as described in Andereck & Nyaupane (2011).

Means for All Quality-of-Life Indicators

| Items | Importance ¹ | Satisfaction ² | QOL Score ³ | Tourism Effect ⁴ | TQOL Score ⁵ |
|--|-------------------------|---------------------------|------------------------|-----------------------------|-------------------------|
| No state income taxes | 4.5 | 4.6 | 17.7 | 1.9 | 35.0 |
| Quality live sports | 3.6 | 3.6 | 12.5 | 2.1 | 27.5 |
| Quality nature-based/outdoor activities | 4.2 | 3.7 | 13.0 | 1.8 | 25.5 |
| Quality restaurants and culinary options | 4.2 | 3.5 | 12.3 | 1.8 | 25.0 |
| Quality festivals and events | 4.0 | 3.4 | 12.0 | 1.9 | 24.3 |
| Strong and diverse economy | 4.4 | 3.6 | 12.7 | 1.8 | 24.1 |
| Quality job opportunities | 4.5 | 3.6 | 12.7 | 1.7 | 24.0 |
| Diverse and inclusive community | 4.1 | 3.5 | 12.3 | 1.7 | 22.7 |
| Quality cultural options (e.g., museums, theaters) | 4.0 | 3.4 | 11.6 | 1.6 | 21.3 |
| Preservation of natural environment | 4.3 | 3.6 | 12.4 | 1.6 | 21.1 |
| Quality shopping | 3.7 | 3.4 | 11.8 | 1.5 | 20.7 |
| Traffic, congestion, and parking conditions | 4.3 | 3.0 | 10.0 | 0.7 | 12.2 |

¹ Scale: 1 = not at all important to 5 = extremely important.

² Scale: 1 = not at all satisfied to 5 = extremely satisfied.

³ Range: 1 to 20.

⁴ Scale: -3 = tourism greatly decreases to +3 = tourism greatly increases.

⁵ TQOL Score = QOL x Tourism Effect; range: -60 to +60.

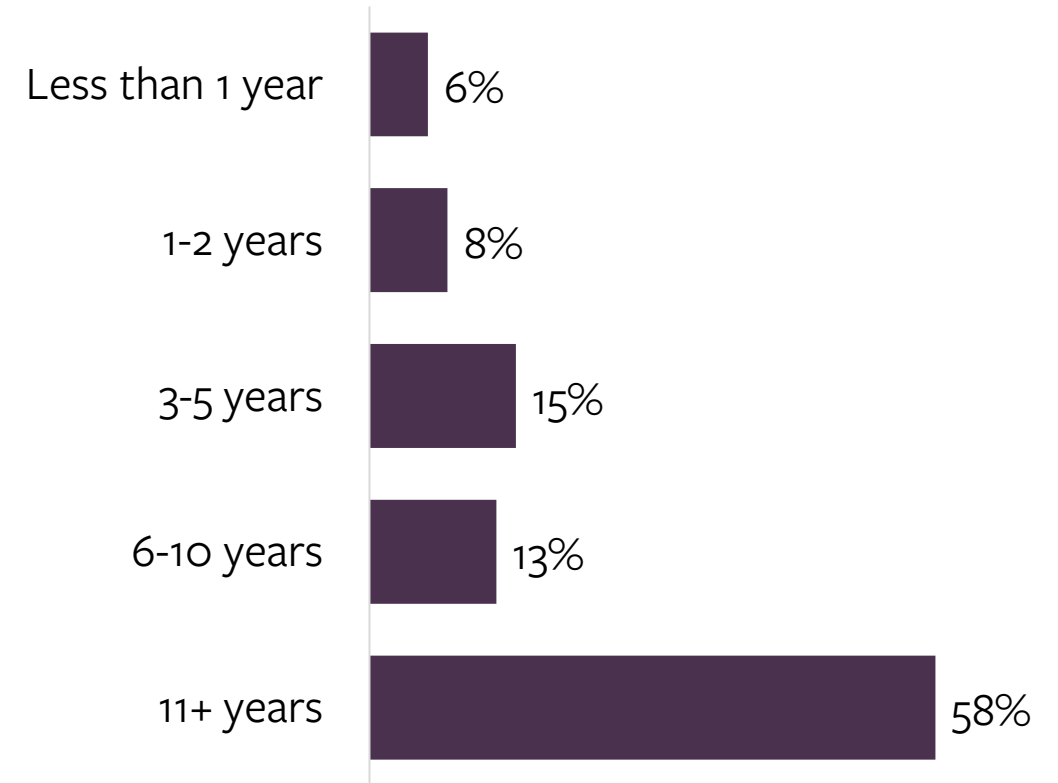
Demographics



Duval County Residence

- Nearly 3 in 5 Duval County residents have lived in the area for over 11 years

Length of Residence in Duval County



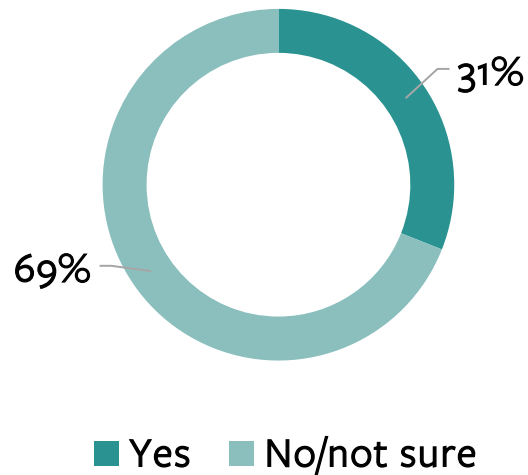
Previous State of Residence¹

| Previous State of Residence | |
|-----------------------------|-----|
| Elsewhere in Florida | 41% |
| Georgia | 7% |
| Connecticut | 4% |
| New York | 4% |
| North Carolina | 4% |
| California | 3% |
| Illinois | 3% |
| Virginia | 3% |
| Alabama | 2% |
| Colorado | 2% |
| New Jersey | 2% |
| Ohio | 2% |
| Pennsylvania | 2% |
| South Carolina | 2% |

¹ In what state were you living before moving to Duval County?

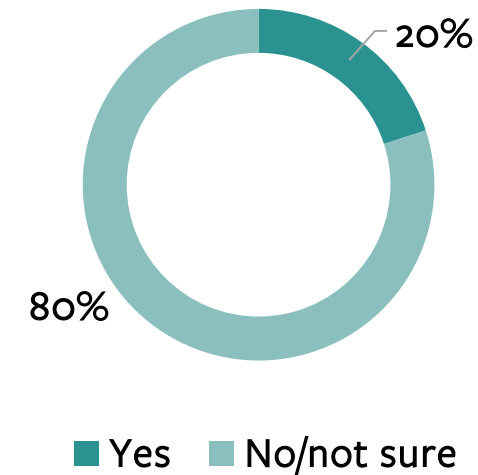
Resident Connection to Tourism

Works in Tourism¹



Over 3 in 10 residents or their families work for businesses that cater to visitors in Duval County.

Works in Accommodations Serving Visitors²



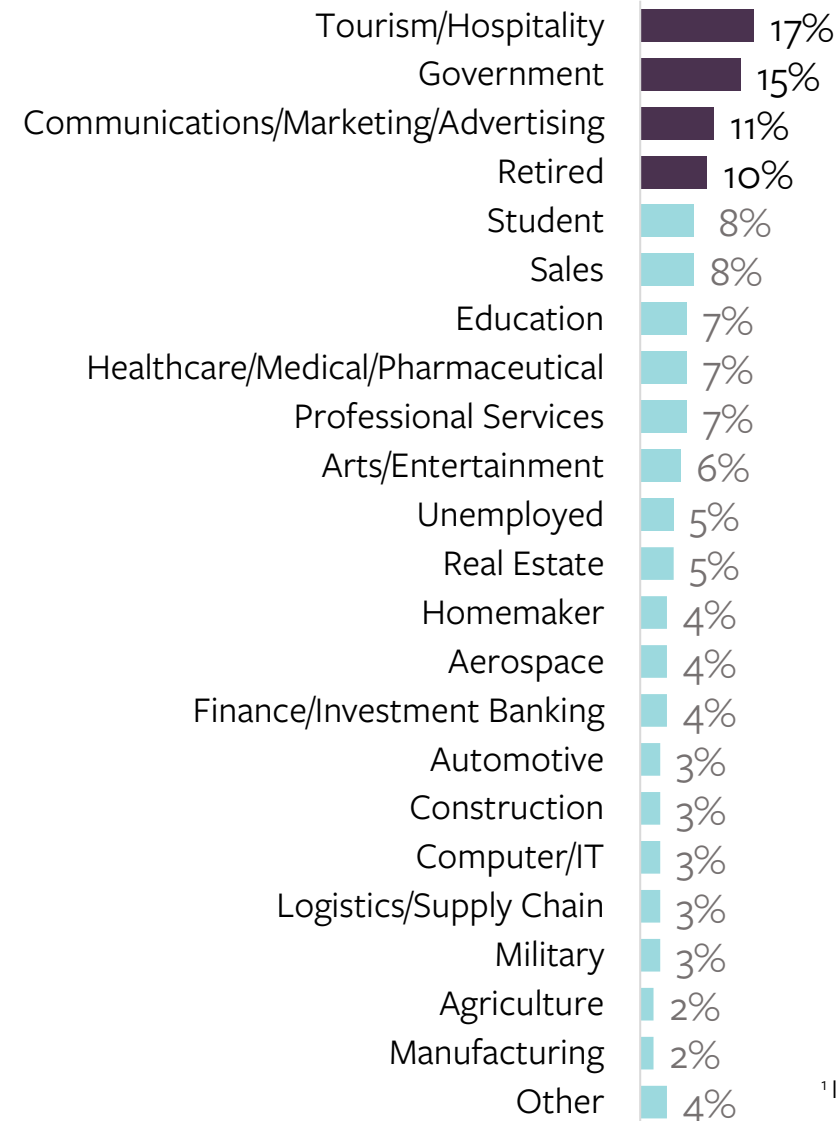
1 in 5 residents or their families work in accommodations serving visitors to Duval County.

¹ Do you or anyone in your family work for local businesses that cater to visitors in our community (retail stores, attractions, restaurants, recreational and/or sports facilities, transportation companies, museums, performing arts, entertainment venues, community festivals and/or event venues)?

² Do you or anyone in your family work in hotels, vacation rental companies, or other accommodations that serve visitors to Duval County?

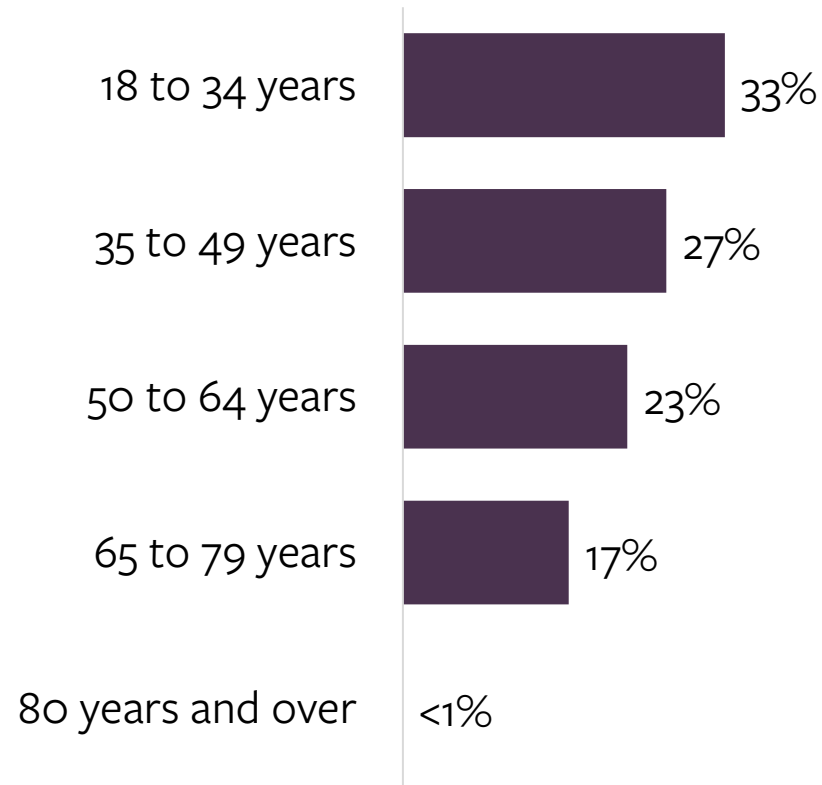
Resident Industries of Employment¹

- Over 1 in 6 residents work in the tourism/hospitality industry
- Nearly 1 in 6 work in government
- Around 1 in 10 work in communications/marketing/advertising or are retired



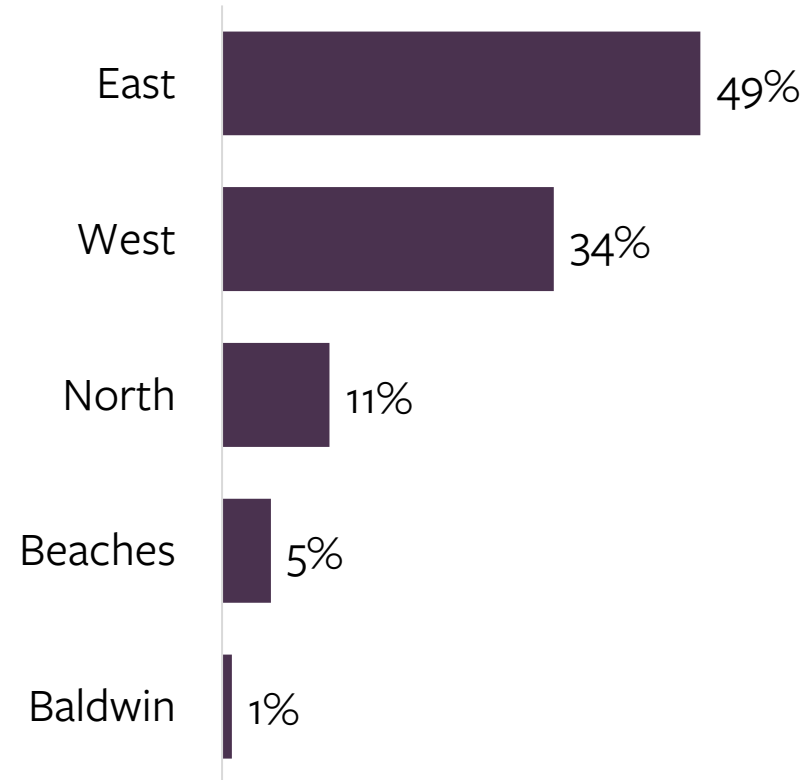
¹ In what industry or industries do you work?
Multiple responses permitted.

Participants in this study matched the age distribution of Duval County's population based on U.S. Census data.
The median age was **43 years old**.



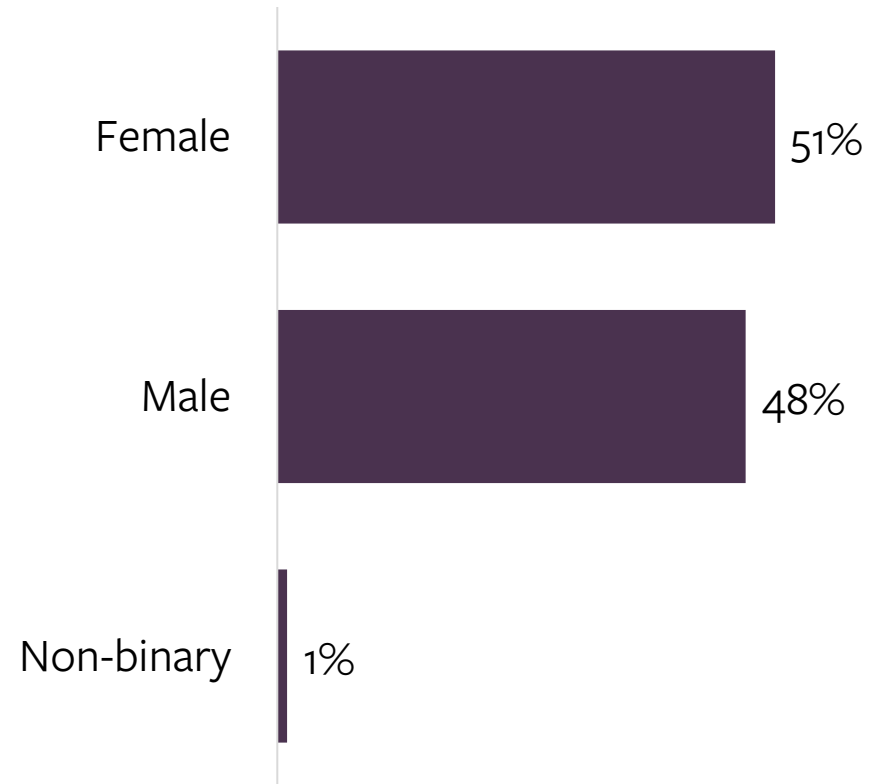
County Subdivision

Participants in this study matched the county subdivision distribution of Duval County's population based on U.S. Census data.



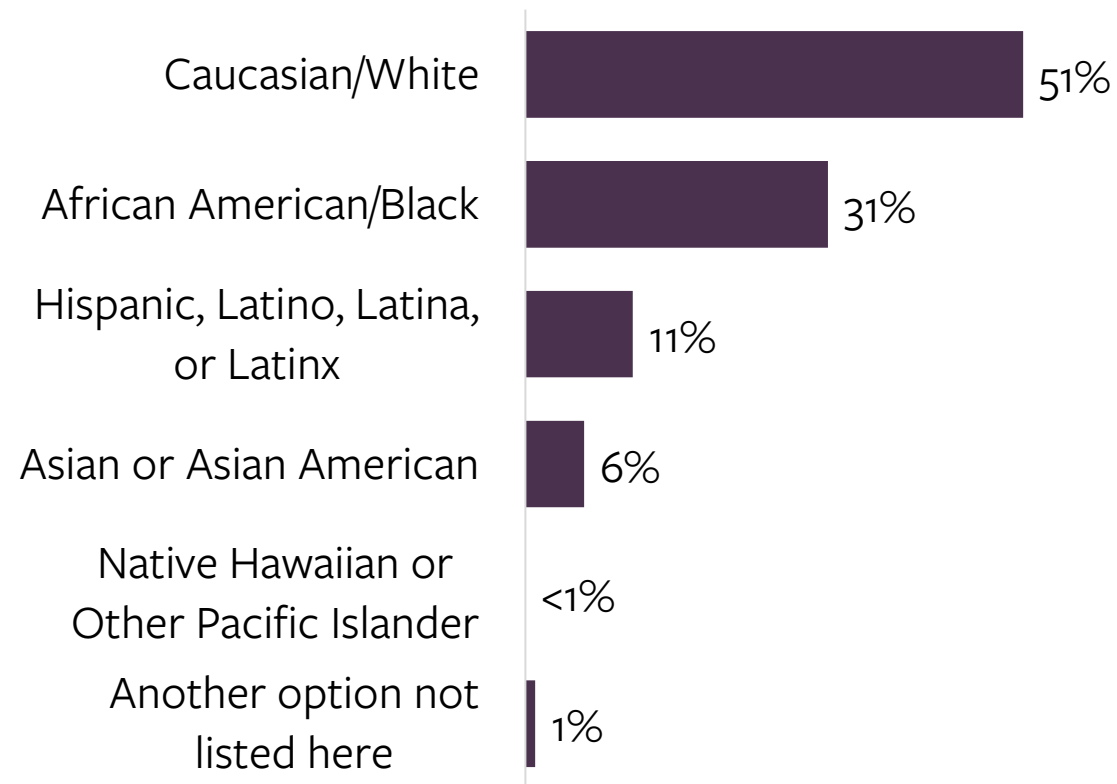
Gender

Participants in this study matched the gender distribution of Duval County's population based on U.S. Census data.



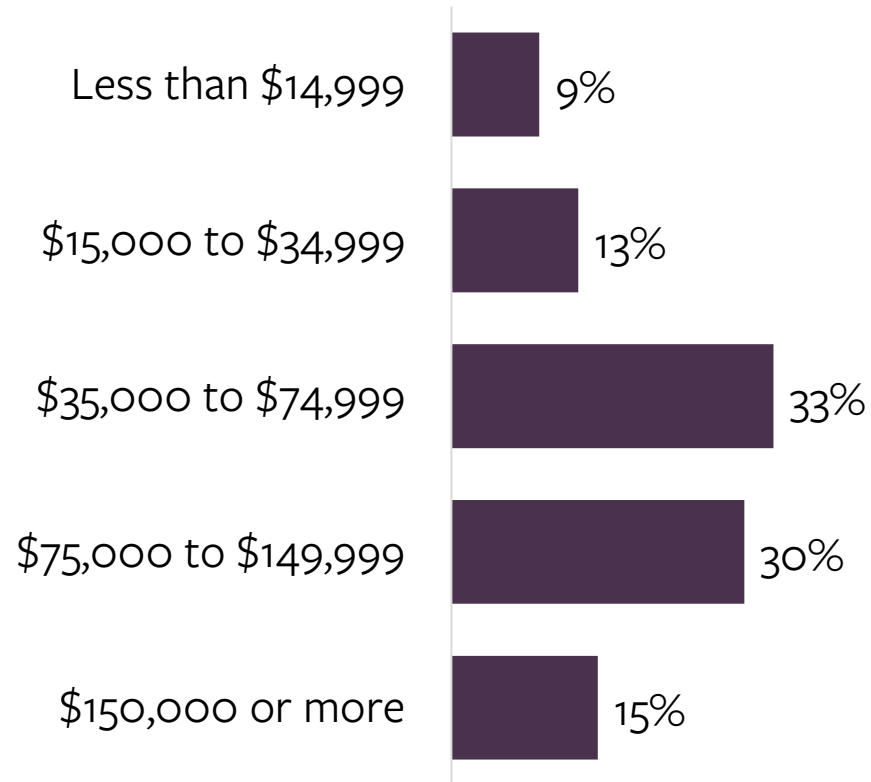
Race/Ethnicity

Participants in this study matched the race/ethnicity distribution of Duval County's population based on U.S. Census data.



Household Income

Participants in this study matched the income distribution of Duval County's population based on U.S. Census data.
The median household income was **\$68,940**.





Visit Jacksonville

Resident Opinion Study
November 2024 - March 2025

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