

MEMORANDUM

To: City Commission, City of Madeira Beach

From: Jerry Cantrell, Chair, Civil Service Commission

Date: June 1, 2026

Subject: Tourism Intensity, Seasonal Population Impacts, and Comparative Compensation Context

I. Purpose

This memorandum provides a data-supported analysis of Madeira Beach’s tourism intensity, seasonal population dynamics, and peer city comparisons to inform governance workload and compensation considerations.

II. Executive Summary

Madeira Beach has a permanent population of approximately 4,000 residents. As part of the broader Pinellas County tourism market, which hosts approximately 15.4 million visitors annually, Madeira Beach experiences a relatively high level of visitor activity compared to its population. The presence of major attractions, including John’s Pass Village & Boardwalk, further contributes to this activity. During peak tourism periods, the effective population increases several times above the permanent population.

In practical terms, Madeira Beach functions as a small city serving a much larger and highly variable visitor population.

👉 **Conclusion:** Madeira Beach functions operationally more like a *mid-sized tourism municipality* rather than a small residential city.

III. Community Profile

Metric	Value
Resident Population	~4,000
Land Area	~1 sq. mile
Location	Barrier Island, Pinellas County
Visitor Volume (Est.)	~3.0M–4.5M (annually - planning estimate)

IV. Tourism Intensity

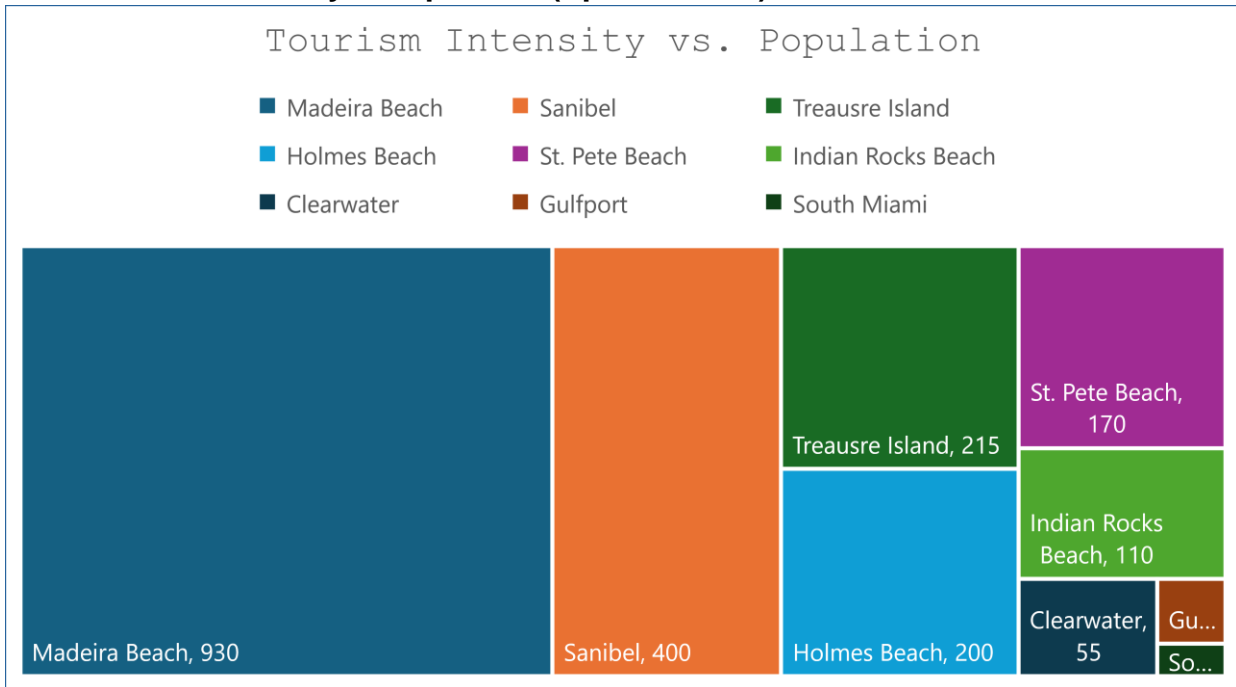
During peak tourism periods³, the effective population increases several times above the permanent population. This increase in population creates service demands more consistent with those of a significantly larger municipality. Planning-level comparisons indicate that visitor activity substantially exceeds the resident population when viewed on an annual basis.

👉 **Estimated Ratio:** (a) **Low:** ~750:1, (b) **Midpoint:** ~930:1, and (c) **High:** ~1,100:1.

These ratios illustrate the relative scale of visitor activity compared to the resident population and are intended as planning-level indicators rather than precise measurements.

MEMORANDUM

Chart 1 – Tourism Intensity Comparison (Spatial Scale)

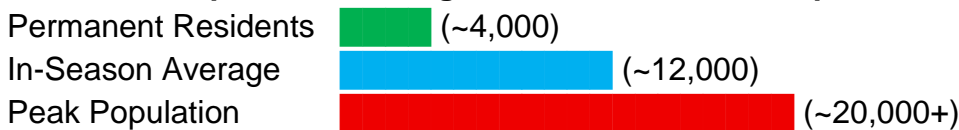


👉 **Key Insight:** Madeira Beach is an outlier among comparable municipalities in terms of tourism intensity. *These comparisons demonstrate that Madeira Beach experiences a higher relative tourism load than many similar sized municipalities.*

V. Seasonal Population Impact

Madeira Beach experiences significant seasonal fluctuations, particularly during winter tourism season, spring break, and summer.

Estimated Population Scaling: Chart 2 – Seasonal Population Multipliers



Operational Impacts of Seasonal Surge

The influx of visitors results in:

- Increased law enforcement demand.
- Code enforcement complexity (short-term rentals, noise).
- Traffic and parking congestion.
- Elevated emergency services utilization.
- Increased strain on infrastructure, waste management, and public spaces.

👉 **Key Insight:** The city must manage large-city operational demands with small-city staffing and governance structures. Planning-level estimates are based on lodging capacity, occupancy, and peak visitation patterns. *This dynamic is comparable to other high-tourism coastal municipalities, though Madeira Beach’s small population amplifies its relative impact.*

VI. Methodology

MEMORANDUM

Approach to Visitor Estimates

Visitor counts and tourism ratios were developed using **multi-source modeling**, including:

1. Regional Baseline

- Pinellas County tourism (~15M+ annual visitors).

2. Local Demand Indicators

- Hotel and short-term rental inventory.
- Average occupancy rates (~70–80%).
- Length-of-stay estimates.

3. Attraction-Based Scaling

- Visitor draw of:
 - John’s Pass Village & Boardwalk.
 - Beachfront access.
 - Tourism district density.

4. Comparative Benchmarking

Modeled against similar cities including:

- Treasure Island, FL.
- St. Pete Beach, FL.
- Indian Rocks Beach, FL.
- Holmes Beach, FL.
- Destin, FL.
- Panama City Beach, FL.

Important Disclaimer

Municipal-level visitor counts are not reported separately from county tourism totals. As a result, tourism estimates for Madeira Beach, and all comparative municipalities are derived from:

- Regional tourism totals.
- Lodging inventory and occupancy.
- Attraction draw (John’s Pass – Madeira Beach).
- Comparative peer city analysis.

These figures are planning estimates and not audited totals.

VII. Comparative City Analysis

City	Population	Budget	Tourism Ratio	Commissioner	Mayor
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MEMORANDUM

Madeira Beach	~4,000	~\$30M / ~\$50M	~750:1 - 1100:1	~\$7,500	~\$10,000
Treasure Island	~6,500	~\$30–40M	~215:1	~\$5,400	~\$7,800
St. Pete Beach	~8,700	~\$40–60M	~170:1	~\$6,000	~\$6,000
Indian Rocks Beach	~4,000	~\$5.8M	~110:1	~\$7,200	~\$8,400
Holmes Beach	~4,500	~\$25–35M	~200:1	~\$8,340	~\$29,200
Gulfport	~12,000	~\$21.8M	~18:1	~\$20,770	~\$20,770
Clearwater	~114,000	~\$710M	~55:1	~\$60,000	~\$60,000

Chart 3 – Compensation vs Tourism Load (Conceptual)

CITY	COMPENSATION	TOURISM LOAD
Madeira Beach	LOW	VERY HIGH
Treasure Island	LOW	HIGH
St. Pete Beach	LOW	HIGH
Gulfport	HIGH	LOW
Clearwater	HIGH	MODERATE

Compensation figures are approximate and reflect base stipends; actual compensation structures vary by city and may include additional benefits or adjustments. Madeira Beach’s tourism ratio is on the order of several hundred times the resident population annually (roughly 750:1 – 1,100:1 based on planning estimates).

VIII. Governance Implications

Madeira Beach exhibits a notable imbalance between its permanent population and tourism-related demand, requiring governance, services, and infrastructure responsive to fluctuating high-use conditions.

Factor	Condition
Population	Very small
Tourism volume	Extremely high
Seasonal variability	Severe
Governance workload	High and fluctuating

Key impacts:

- Service demands comparable to significantly larger municipalities
- Variable workload based on seasonal conditions
- Increased complexity in policy enforcement and operations

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IX. Policy Consideration

MEMORANDUM

Evaluation of governance structures should consider tourism-driven demand and seasonal population scaling, not solely resident population.

📌 Traditional comparisons based on resident population alone are insufficient.

Key considerations:

- Tourism-driven demand.
- Seasonal population scaling.
- Infrastructure and regulatory complexity.
- Workforce and operational load.

Tourism activity also contributes significantly to local economic activity and municipal service demand.

X. Conclusion

Madeira Beach is a small-population municipality operating within a high-intensity tourism environment. Governance responsibilities, service demands, and infrastructure needs are influenced not only by residents, but by a significantly larger and variable visitor population.

References

1. Visit St. Pete/Clearwater reports approximately 15.4 million annual visitors to Pinellas County.
2. City of Madeira Beach identifies John's Pass Village & Boardwalk as Pinellas County's #1 tourist attraction.
3. Seasonal population impacts derived from observed peak visitation patterns and high occupancy periods.