

OCTOBER 2016

JEKYLL ISLAND

ISLAND-WIDE TRANSPORTATION SYSTEM
FEASIBILITY REPORT



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TABLE OF CONTENTS

Executive Summary.....	5
Phase One: Transportation System Research.....	7
Research Summary.....	8
Phase Two: Stakeholder Engagement.....	10
Engagement Summary.....	10
Findings.....	13
Priority One: Employee Parking and Transportation.....	14
Priority Two: Employee Transportation from Brunswick.....	14
Priority Three: Visitor Shuttles for Large Conventions and Events.....	15





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EXECUTIVE SUMMARY

The Jekyll Island Authority (JIA) contracted with the University of Georgia's Carl Vinson Institute of Government to study the feasibility of an island-wide transportation system. The Institute examined employee and visitor transportation needs, researched other similar systems, and explored possible options suitable for Jekyll Island. The two-phase study produced findings and priorities for the Jekyll Island Authority (JIA) to consider.

During Phase One, Institute researchers looked at existing resort-based transportation systems around the country. Research questions included how systems were setup, operated, and funded. Phase Two centered on public engagement. A diverse group of stakeholders including hotel managers, restaurant/business owners, and the convention center employees among others were interviewed. The questions focused on island transportation needs, issues, and possible solutions.

Based on the research, engagement, and the issues identified during the study, an island-wide transportation system is not feasible at this time. The primary obstacles are funding for startup, operations, maintenance, and a lack of consistent ridership. The need for transportation on the island is seasonal and sporadic. There are several other alternative means for transportation including bicycles and electric vehicles. Getting visitors to park their cars and take a shuttle is a significant challenge. Employee transportation is a more pressing need.

Three other transportation-related priorities emerged as a result of the study.

1. Consolidating employee parking away from congested areas such as the village and Convention Center to free up parking for visitors
2. Employee transportation from Brunswick through a possible partnership with the Coastal Regional Commission
3. Visitor shuttles for large conventions, events, and holidays



INTRODUCTION

The Jekyll Island Authority (JIA) contracted with the University of Georgia's Carl Vinson Institute of Government to study the feasibility of an island-wide transportation system. The Institute examined employee and visitor transportation needs, researched other similar systems, and explored possible options suitable for Jekyll Island. The study was conducted in two phases. The first phase involved researching transportation in other resort areas in the United States and Canada. In the second phase, Institute researchers interviewed key Jekyll Island stakeholders to understand the needs of businesses, employees, and residents. This report summarizes the research and presents possible options for JIA to consider.

PHASE ONE

TRANSPORTATION SYSTEM RESEARCH

Institute of Government researchers began by identifying a diverse set of 11 land transportation systems located in US and Canadian resort areas. The following 10 transportation systems examined are not all located in coastal areas:

- Anaheim Resort Transportation (ART), Anaheim Resort District, Disneyland area, CA
- The Wave, South Padre Island, TX
- Charleston Area Regional Transportation Authority (CARTA), Charleston, SC
- Delaware Authority for Regional Transit (DART), Delaware Beaches, DE
- Free Ride Transit System, Breckenridge, CO
- Martha's Vineyard Regional Transit Authority (VTA), Martha's Vineyard, MA
- ROAM, Banff, Alberta, Canada
- San Juan Transit, San Juan Island, WA
- Steamboat Springs Transit (SST), CO
- Village Transportation Center in Beaver Creek, Avon, CO
- The Wave, Nantucket Regional Transit Authority, Nantucket Island, MA

The JIA staff reviewed information about these systems and asked that some additional smaller scale systems be identified and researched. Several of the initial 11 systems reviewed are large operations and not comparable to the needs on Jekyll Island. Four additional systems were examined:

- Sea Pines Trolley Service, Sea Pines, Hilton Head Island, SC
- Cougar Shuttle, College of Charleston, Charleston, SC
- Clemson Area Transit (CAT), Clemson, SC
- Snow Bus/Big Mountain Commercial Association, Whitefish, MT

Many of the systems examined are not comparable to Jekyll Island's situation. Most are much larger operations run by or in partnership with local governments that have access to significant state and federal transit dollars. Financing an island-wide system is the main issue for Jekyll. Not being a local government, Jekyll does not have the options to raise revenue like the city- and county-provided services. While many of the systems examined charge rider fares, those revenues only cover a portion of overall operating costs. Several of these systems match federal or state funds with local tax dollars. Jekyll lacks that funding option. A small number of systems researched were funded by the resort directly such as the Sea Pines Trolley and the Village Transportation Center in Beaver Creek Ski Resort. This is also not an option for Jekyll Island.

At present, private sector operators and the Coastal Regional Commission provide transportation services on Jekyll and in some cases to the island. More than one provider has been working with the hotels, conference center, and the JIA to shuttle visitors and employees onto and around the island. Private sector options also exist for water taxi services. At this point, continuing to work with the private sector appears to be the best option, especially with the funding obstacles the JIA would face setting up and running an island-wide transportation system.

RESEARCH SUMMARY

System Purpose:

The primary purpose of the transportation systems examined is to move visitors from areas of lodging to attractions, shopping, and other amenities. A few also transport employees, but that is not the primary purpose. Some, such as the ART in the Disneyland area, encourage employee use by offering discount passes. In the second set of systems reviewed, two were not resort-oriented. The Cougar Shuttle and CAT are college-oriented systems intended to get students to and from class.

These college-oriented shuttles are not good for comparison to Jekyll. They are funded by student fees, which is not an option for Jekyll. The Anaheim system is a very large operation and also is not comparable to Jekyll's needs.

Operations:

Many of the transportation systems' operations are seasonally based. During the off-season, services are significantly reduced. The primary exception is the ART, which operates a full schedule year round. This Disneyland-related system is too large for Jekyll to use as a comparison. Local governments, amenity/hospitality providers, or some combination operate the other systems reviewed, which sets them apart from the JIA's situation. Local governments have revenue-raising powers that the JIA does not have and use those funds to match federal and state transportation funds to provide many of the transit systems reviewed.

Funding:

The systems researched are funded in multiple ways and often use a combination of funding sources. Those systems provided by local governments generally have a user fee that is supplemented by other local, state, and federal dollars. Federal and state transportation funds are used to offset some of the operating costs. The two college systems are provided free of charge to the rider and funded by student fees. This method is not a good comparison for Jekyll Island. Others, like the Sea Pines Trolley in Hilton Head, are free to the rider and paid for by resorts.

The Wave on South Padre Island, Texas, is the most comparable to Jekyll. Jekyll Island is smaller but similar in that it has lodging, amenities, commercial services, and restaurants at different points around the island. The Wave moves visitors and employees among these types of points on a set schedule with established routes and stops. The system is provided by the city with funding from the Texas Department of Transportation Rural Transit Program, the city of South Padre Island, and the City of Port Isabel Economic Development Corporation.

Funding is the key obstacle to Jekyll establishing an island-wide transportation system. Compared to the other resorts reviewed, Jekyll Island is smaller, and its lack of local government funds limit the ability to generate the revenue needed to set up and operate such a service. If Glynn County or Brunswick were to develop a transit system, the JIA should consider working with the local government on routes to and from Jekyll. Local governments have the ability to directly fund transportation systems, and they have access to state and federal transportation funds, making it more feasible for them to start a system.

The Coastal Regional Commission is currently providing the only public transportation to the island from Brunswick, and those are contract routes with Jekyll businesses to bring in employees. There are four round-trips per day. The employer pays \$5.00 per person on a monthly billing, and the rider pays \$3.00 one way or \$6.00 round trip.

Water Transportation:

The JIA also asked the Institute of Government to examine the feasibility of water taxi service from Jekyll Island to St. Simons and other points. Three services were identified for review:

- Charleston Water Taxi, Charleston, SC
- Cape Water Taxi and Tours, Lewes, DE
- St. Johns River Taxi, Jacksonville, FL

All three are private businesses and are not operated or funded by government or hospitality/ amenity groups. These three water transportation systems operate a combination of set service times and as needed.

At least two private vendors are currently providing water transportation services on Jekyll on an as-needed basis. Working with the convention center or private groups, they are currently meeting water transportation needs.

PHASE TWO

STAKEHOLDER ENGAGEMENT

The Institute of Government research team interviewed key island stakeholders, including business and restaurant owners, hotel owners/managers, amenity operators, and convention center representatives. Participants were asked the following questions:

- Is there a visitor need for an island-wide transportation system?
- Is there an employee need for an island-wide transportation system?
- If so, what type of system?
- Is there a need for off-island transportation?
- When is the transportation needed?
- How can such a system be funded?
- What are some examples of other systems you have seen?

ENGAGEMENT SUMMARY

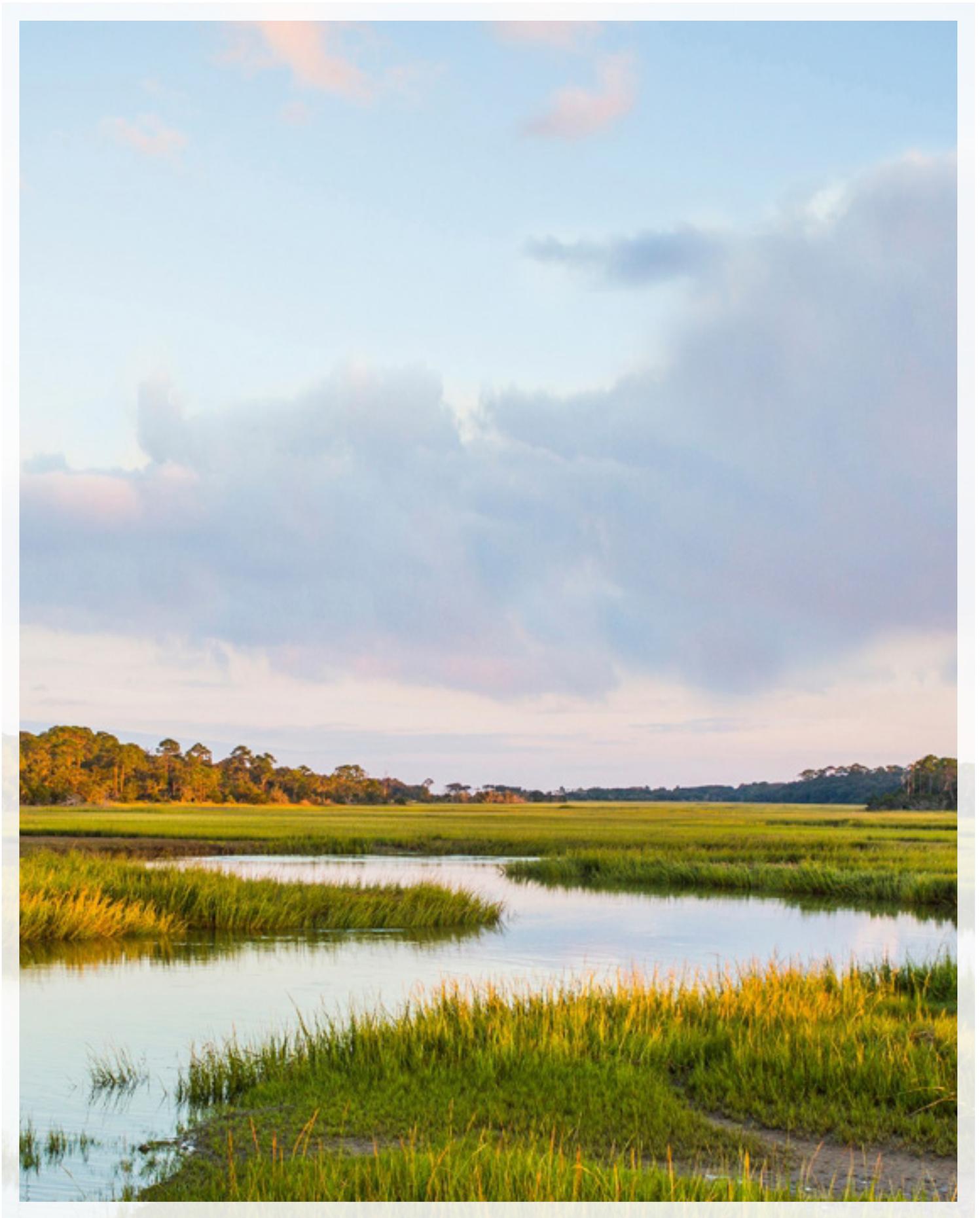
Visitor Need?

The answers to this question varied significantly depending on where on the island the person interviewed was located. Those near the convention center and village did not see much need for an island-wide system to serve visitors. Those located in areas away from the central core did see a need to move visitors to and from their location to the convention center, commercial village, and other amenities. Hotel-provided shuttles were often cited as currently addressing most transportation needs for visitors who did not use their own cars, bikes, or Red Bug electric vehicles. There was general agreement on a need to have more visitor transportation during large events such as July 4th and during large conventions. **Several interviewees identified the issue more as a parking availability problem than a transportation problem. Some interviewees indicated that when business owners and employees park in lots, sometimes there are not enough spaces for visitors.**

Employee Need?

While not identified as an island-wide system need, some interviewees discussed issues related to employee transportation and parking. Having to travel from the mainland to the island limits the quality of the labor pool for some service jobs. Representatives from several of the hotels that shuttle employees from Brunswick indicated that a more coordinated approach would be helpful.

Employee parking on the island was also seen as an issue. Due to limited parking at some locations, employee parking cuts into the availability of visitor parking. A consolidated on- or off-island parking lot with regular shuttles to and from jobs during key shift change times was identified as an option to be explored.



JEKYLL ISLAND

ISLAND-WIDE TRANSPORTATION SYSTEM FEASIBILITY REPORT

What type of system?

For those who see a need for an island-wide system for visitors, most prefer a system with set schedules and routes that move people from lodging to amenities, businesses, and the convention center. Dedicated routes and service during large conventions, especially in the morning, was also identified as something to be explored. Many interviewees indicated that the summer season, Christmas to New Year, and during large events were times when a transportation system is needed and would be most used.

Off-island need?

Off-island transportation was not identified as a key need. Some interviewed said that employees could use transportation to get to work from the mainland. Water taxi service to St. Simons during large conventions was the most cited possible need. Jekyll business and restaurant owners expressed only limited interest in transportation to or from St. Simons.

How to fund?

Several of those interviewed identified non-user fee based methods of paying for an island-wide transportation system, including soliciting business contributions, increasing the hotel/motel tax percentage rate, raising the island entrance fee, funding through JIA, or some combination of these sources. User fees were mentioned, but some said visitors would only use the service if it were free or very low cost. Visitors like their cars, and a low or no fee system would be needed to convince them to leave the car behind. Most of the systems researched were funded by a combination of public and private funds in addition to some user fee even if nominal.

What other systems have you seen that might compare?

Savannah historic district trolley: Chatham Area Transit provides free service to riders, including shuttles in the historic district, a ferry across the river, and river street shuttles. The service is part of the overall transit system for the county and is supported through a combination of local, state, and federal funds.

- Pigeon Forge, TN: This service was started by the city of Pigeon Forge to help move visitors and alleviate traffic. Riders buy a bracelet for \$2.50 and can ride all day, getting on and off at regular stops. It is financed through a combination of local, state, and federal transportation funds.
- Disney World shuttle: This service is provided free to those staying at Disney hotels to move them in and around the various theme parks. It is funded by the resort. It does not take people to hotels outside the resort or to other area attractions.
- St. Augustine, FL: St. Augustine offers various private sector options. The St. Augustine Trolley is run by a private contractor and has regular routes and stops in the historic district. A three-day pass is \$25.74 per adult and \$10.30 per child between ages 6 and 12; those under 6 ride free.

- Amelia Island Plantation, FL: Private sector shuttles are available to get people from the airport to the plantation. A resort shuttle that operates within the plantation is complimentary to visitors and provided by the resort.
- Las Vegas Shuttle: Las Vegas has a combination of transportation options. The casinos provide free shuttles that are generally designed to move visitors between their properties. There does not appear to be a system with regular routes and stops that are unrelated to the resort that is funding them.

FINDINGS

At this time, the need for an island-wide transportation system on Jekyll is questionable, and it is not feasible for the authority to start, operate, and maintain such a system. As redevelopment continues and visitation grows, an island-wide system may be needed in the future. The need for any type of additional transportation on Jekyll Island is very seasonal. For most of the year, it is not an issue. Traffic and parking only become problematic in the summer season, during holidays, and when large conventions and other special events are held on the island.

A significant obstacle to the use of such a system is that visitors like the convenience of using their own vehicles. If the JIA were to determine in the future that an island-wide system were warranted, incentives to encourage visitors to park their cars and use other transportation means would need to be a part of the strategy.

The primary obstacles to the JIA developing a system are funding and ridership that is seasonal and sporadic with a visitor base that prefers to use their own vehicles. Most of the systems researched are supported by local government funds supplemented significantly by state and federal transportation funds. The authority is very limited in its ability to raise revenue. Not being a local government, it does not have the power to tax to provide the service, and such a system could not be operated with user fees alone. Although local governments have access to some of the federal and state transportation funds used in other resort communities to support transportation systems, at this time neither Brunswick nor Gynn County have chosen to implement a transit system. If they do in the future, the JIA should work with them on routes to and around Jekyll.

The review of transportation systems in other resort communities, stakeholder interviews, and discussions with JIA staff did lead to three ground transportation priorities for the JIA to consider.

PRIORITY 1

EMPLOYEE PARKING & TRANSPORTATION

The most obvious and cost-effective place to start is with employee parking and transit. A centralized employee parking lot (on or off island) with regular shuttles during key employment shift-change times should be considered. Owners and representatives from some hotels and other businesses interviewed indicated that their own employees' vehicles limit the availability of visitor parking at their locations.

Jekyll has already developed a lot to be used for employee parking adjacent to the old bridge on the causeway. Employers should require their employees to use the lot. Lighting would need to be added for safety when used at night.

The JIA has existing relationships with some private sector vendors that have expressed interest in contracting to provide transportation from the employee lot to area businesses. Further discussion with vendors and businesses on the island to finalize times and routes is needed, but two to three morning, evening, and late-night routes would be a place to start. Employers would need to be key financial partners in paying for the contract service to provide transportation between the lot and island businesses.

Consolidating employee parking would free up parking for visitor use and reduce vehicular traffic on the island. Employees and business owners parking in visitor spaces is an issue. The employee lot with a shuttle service would be quick way to increase parking availability for visitors.

PRIORITY 2

EMPLOYEE TRANSPORTATION FROM BRUNSWICK

Transportation from Brunswick to Jekyll for service employees is needed. The Coastal Regional Commission (CRC) currently has contracts with three island businesses to shuttle their employees from the mainland to their location. CRC Transportation Director Don Masisak is interested in meeting with the JIA to talk about how to provide more service to other businesses that have this need. Several are shuttling employees on their own, indicating there is a need. ***A good workforce is important, and fewer employee cars on the island will ease traffic congestion and free up more spaces for visitor vehicles.***

PRIORITY 3:

VISITOR SHUTTLES FOR LARGE CONVENTIONS & EVENTS

In the mornings when people are traveling from their lodging to the convention center during larger conventions and key seasonal events, traffic is heavy and finding parking at the convention center can be difficult. That lot also serves Great Dunes Park and provides beach access. Thus, convention parking in the lot can reduce access for visitors planning a day at Great Dunes. A system of shuttle routes for large conventions and events should be considered. ***Private providers already partner with the convention center for big conferences, but a more coordinated approach would further reduce traffic and increase the number of parking spaces available. The authority staff, working with the convention center operator, should determine which events are large enough to warrant such a service.***

The JIA has been experimenting with providing shuttles for visitors during special events. In the summer of 2017, the JIA should consider testing a shuttle from the beach village shopping area to the Pier Road shopping area. The JIA can contract with a private provider to operate the service. The service could be free to the rider and make a round-trip every 15 to 20 minutes. Having the drivers collect ridership information and including comment cards for passenger feedback would give the authority information needed to make future decisions. If successful, this could be used as a model for other large conventions and events. Contracting with the private sector to provide vehicles and drivers is preferable to the JIA acquiring the vehicles and employees necessary to provide the service.

