



AN ECONOMIC IMPACT STUDY
OF GEORGIA'S

Jekyll Island

SELIG CENTER FOR ECONOMIC GROWTH
TERRY COLLEGE OF BUSINESS
UNIVERSITY OF GEORGIA
DECEMBER 2017

Contents

Summary	2
Part 1: Economic Impact	3
Part 2: Appendices 1-5	13
Part 3: Jekyll Island Survey Details and Maps	23

Selig Center for Economic Growth

Jeffrey M. Humphreys, Director

Beata D. Kochut, Senior Research Analyst

Alexandra P. Hill, Research Analyst

Lorena M. Akioka, Managing Editor / Graphic Designer

JEFFREY M. HUMPHREYS
Director

BEATA D. KOCHUT
Senior Research Analyst
and

ALEXANDRA P. HILL
Research Analyst
Selig Center for Economic Growth

Jekyll Island

The Economic Impact of the Island
on Glynn County, Georgia



Selig Center for
Economic Growth

Terry College of Business

UNIVERSITY OF GEORGIA

Summary

Jekyll Island generates significant, sustainable, annual (recurring) economic impacts for Glynn County. The annual economic impact of Jekyll Island on Glynn County includes:

- \$700 million in sales (output or gross receipts);
- \$416 million in production (value added);
- \$249 million in labor income (earnings);
- 7,170 jobs (15 percent of all the jobs in Glynn County); and
- \$29 million in tax revenues for local government.

The \$700 million output impact accounts for 11 percent of the output produced in Glynn County. Out of the \$700 million output impact, \$586 million (84 percent) results from spending by short-term visitors; \$67 million (10 percent) results from spending by permanent residents of Jekyll Island; \$29 million (4 percent) comes from spending by nonresident homeowners; \$15 million (2 percent) results from spending by daytrippers; and \$4 million (1 percent) comes from spending by long-stay visitors. The multiplier effect enhances the impact of initial spending. For example, of the \$700 million total output impact, \$501 million is initial spending. The induced or re-spending (multiplier) impact adds another \$199 million in economic impact. Dividing the total output impact by initial spending yields an average multiplier value of 1.40. So, on average, every dollar of initial spending generates an additional 40 cents for Glynn County's economy.

These benefits permeate the private and public sectors of Glynn County's economy. For example, Jekyll Island generates a total employment impact of 7,170 full- and part-time jobs, which accounts for 15 percent of all the jobs in Glynn County, or about one job in seven. Lodging and food services businesses account for 4,106 jobs, or 57 percent of the total employment impact. Services industries (including government) account for 1,562 positions (22 percent); and retailers and wholesalers account for 647 jobs, or 9 percent, of the total employment impact. Transportation and warehousing businesses account for 441, or 6 percent of the total employment impact, while finance, insurance, and real estate firms account for 289 jobs (4 percent). The remaining 125 jobs (2 percent) are distributed over a range of industries, including information, construction, and utilities. In addition to these impacts, Jekyll Island generates \$29 million in tax revenues for local governments in Glynn County.

These economic impact estimates demonstrate the importance of Jekyll Island as a pillar of Glynn County's economy, which translates into jobs, higher incomes, and greater production of goods and services. Because the scope of this study includes more than just the tourism industry, the impacts reported here are not comparable to those for tourism alone. The data are for calendar year 2016, but all dollar amounts are expressed in inflation-adjusted 2017 dollars. ■

PART 1

Economic Impact

How much does Glynn County benefit economically from Jekyll Island? This report answers that question by quantifying the economic impacts that Jekyll Island generates for Glynn County in 2016. Although we quantify the benefits for a single 12-month period, the economic benefits recur annually. The economic impacts are estimated for five categories of spending: day trippers who are not Glynn County residents; short-stay visitors who are not Glynn County residents; long-stay visitors; nonresident homeowners; and permanent residents of Jekyll Island. The impacts are based on a regional input-output model of Glynn County's economy, certain necessary assumptions, data provided by the Jekyll Island Authority, data obtained from surveys of visitors, homeowners, residents, and businesses, and data and software purchased from IMPLAN.

This study defines short-term economic impacts as the net changes in regional output, value added, labor income, employment, and tax revenues that are due to new dollars flowing into Glynn County from outside the county.

Economic Impact Highlights

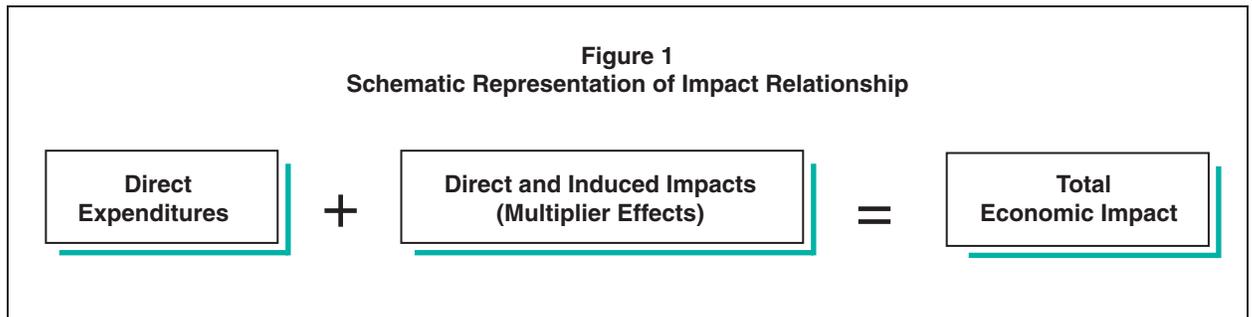
In the simplest and broadest terms, the total economic impact of Jekyll Island is \$700 million (see Table 1), or 11 percent of the output generated in Glynn County. Of the total output impact, \$501 million (78 percent) is initial spending and \$199 million (28 percent) is the multiplier (re-spending) impact of those initial expenditures. Dividing the total output impact by initial spending yields an average multiplier value of 1.40. So, on average, every dollar of initial spending generates an additional 40 cents for Glynn County's economy.

The economic impact also is expressed in dimensions other than output. For example, Jekyll Island adds \$416 million in regional GDP (value added); \$248 million in labor income (earnings); 7,170 full- and part-time jobs; and \$29 million in tax revenue collections for local government. The jobs generated by Jekyll Island account for 15 percent of all the jobs in Glynn County, or one job in seven.

The Concept of Economic Impact

For the purposes of this analysis, the annual economic impact of Jekyll Island consists of the net changes in regional output, value added, labor income, employment, and tax revenues that are due to spending within Glynn County by day-trippers and short-stay visitors who are not Glynn County residents; long-stay visitors (over 30 days); the Island's permanent residents; and property owners (of second homes and rentals) who do not reside on Jekyll. As Figure 1 illustrates, the total economic impact includes the impact of the initial round of spending and the secondary, or indirect and induced, spending—known as the multiplier effect—created as the initial expenditures are re-spent.

Indirect spending refers to the changes in inter-industry purchases as a region's industries respond to the additional demands triggered by spending by visitors, property owners, or residents. These are the ripples of activity created when visitors buy goods or services in Glynn County. Induced spending is similar except that it refers to the additional demand triggered by household spending as income increases due to changes in production. Basically, the induced impact captures the ripples of activity that are created when people spend more due to the increases in



their earnings that were generated by the direct and indirect spending.

The sum of the direct, indirect, and induced economic impacts is the total economic impact, which is expressed in output (sales), value added (gross regional product), income, and employment. Total industry output is gross receipts or sales, plus or minus inventory. It is the value of production by industry (including households) for a given period of time (one year). Total output impacts are the most inclusive and largest measure of economic impact, and because of their size, receive much media attention. One problem with output as a measure of economic impact, however, is that it includes the value of inputs produced by other industries, which means that there some double counting of economic activity is inevitable. The other measures of economic impact (value added, labor income, and employment) are free from this and are very accurate indicators of the Island's economic impact on Glynn County.

Value added (or gross regional product) consists of employee compensation, proprietor income, other property income, and indirect business taxes. It is equivalent to gross output (sales or receipts and other operating income, commodity taxes, and inventory change) minus intermediate inputs (consumption of goods and services purchased from industries or imported). It is the state- or regional-level counterpart of the nation's gross domestic product (GDP).

Income comprises all forms of employment income, including wages, salaries, and proprietors' incomes. It does not include non-wage compensation (e.g., pensions and health insurance), transfer payments (e.g., welfare or Social Security benefits), or unearned income (e.g.,

dividends, interest, and rent). Employment includes total wage and salary employees as well as the self-employed. It includes both full- and part-time jobs and is measured in annual average jobs, and as such, is expressed as the full- and part-time jobs count and not as full-time equivalents.

The multiplier concept is common to virtually all economic impact studies. Multipliers measure the response of the local economy to a change in demand or production. In essence, multipliers capture the impact of the initial round of spending (for final consumption) plus the impacts generated by successive rounds of re-spending of those initial dollars. Because the magnitude of a particular multiplier depends upon what proportion of each dollar spent leaves the region during each round of spending, multipliers are unique to the region and to the industry that receives the initial round of spending. Economic multipliers are model-based and dependent on the specific spending patterns of the industry and applicable regional economies.

Figure 2 illustrates the successive rounds of spending that might take place if a person buys an item locally. Assume that the amount spent is \$100 and that the appropriate regional output multiplier is 2.0. The initial injection of spending to the region is \$100, which creates a direct economic impact of \$100 to the regional economy. Of that \$100, only \$50 is re-spent locally; the rest flows out of the region through non-local taxes, non-local purchases, and income transfers. After the first round of re-spending, the total economic impact to the region is \$150. During the second round of re-spending, \$25 is re-spent locally and \$25 leaks out of the region, a 50 percent leakage. Now, the total economic impact to the region is \$175. After seven rounds of re-spending, less than one dollar remains in the local economy, but the total economic impact has reached

almost \$200. The induced (multiplier effect) impact to the region (\$100) equals the total impact (\$200) minus the direct impact (\$100).

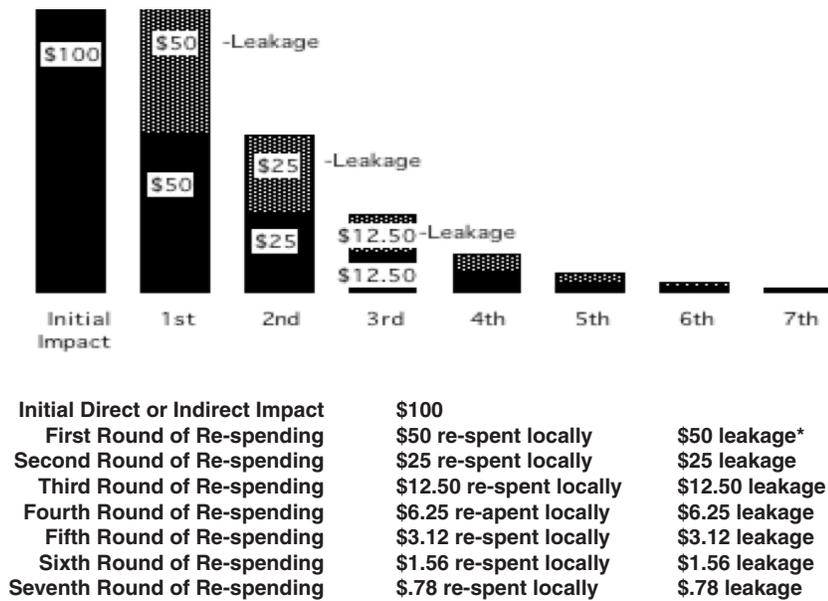
The multiplier traces the flows of re-spending that take place throughout the region until the initial dollars have completely leaked from it to other regions. Obviously, multiplier effects within large, self-sufficient areas are likely to be larger than those in small towns, rural, or specialized areas that are less able to capture spending for necessary goods and services. Multiplier effects also vary greatly from industry to industry, but in general, the greater the interaction with the local economy, the larger the multiplier for that industry. For instance, personal services, business services, and entertainment industries have intricate relationships with local supporting industries, and thus have relatively high multiplier values. Conversely, electric, gas, and sanitary services usually are less inter-

twined with local supporting industries, so their multipliers are smaller.

Type SAM (Social Accounting) multipliers from the IMPLAN modeling system were used to estimate the economic impacts associated with all categories of spending. These multipliers capture the original expenditures resulting from the impact, the indirect effects of industries buying from industries, and the induced effects of household expenditures based on information in the social account matrix. They account for Social Security and income tax leakage, institutional savings, commuting, and inter-institutional transfers, and people-to-people transfers.

Wherever appropriate, the IMPLAN software applied margins to convert purchaser prices to producer prices. In input-output models, all expenditures are in terms of producer prices, which allow all spending to be allocated to the industries that actually produce the goods or services.

Figure 2
How Multipliers Capture the Impact of Re-spending



*Leakage indicates amounts spent outside area and not re-circulated locally.

METHODOLOGY

Estimating the economic impact of Jekyll Island on Glynn County's regional economy involved a number of basic steps. First, administrative data were obtained from the Jekyll Island Authority. Then online surveys of visitors, residents, homeowners, and businesses were conducted to estimate spending within Glynn County. Next, spending by day trippers, short-stay visitors, and long-stay visitors was estimated. Spending by second-home and rental property owners who do not live on Jekyll was estimated, as was spending by Island residents. Spending was allocated to industrial (economic) sectors recognized by the economic impact modeling system built specifically for Glynn County. Finally, the IMPLAN model was applied to each category of spending to calculate five indicators of economic impact on Glynn County: output (sales), value added (gross regional product), labor income (wages, salaries, benefits, and proprietor's income), employment, and tax revenues for local government.

Surveys

Online surveys powered by Qualtrics gathered data needed to estimate Jekyll Island-related spending within Glynn County by day trippers, short-stay visitors, long-stay visitors, nonresident homeowners, and residents. Visitors, residents, and nonresident homeowners responded to the online survey from April 14, 2017 through June 1, 2017, and answers reflect the respondent's most recent trip to Jekyll Island. Businesses responded to the survey from April 25, 2017 through June 1, 2017. The Jekyll Island Authority provided the participants' email addresses. The Selig Center analyzed the survey responses using Access, Excel, and SPSS. Tabulations of survey responses are provided in Part 3.

The margins are derived from U.S. Bureau of Economic Analysis data, and differ by the type of consumer. For example, consumers pay transportation, wholesale, and the full retail margin. In contrast, large organizations may pay little or no retail margin as they typically have more buying power than an individual does. In addition, some sectors of the model do not have margins because there are no wholesalers or retailers involved when someone rents a hotel room, for instance.

The model's default estimates of Glynn County's regional purchase coefficients were used to derive the ratio of locally purchased-to-imported goods. The regional purchase coefficient represents the proportion of the total demands for a given commodity that is supplied by Glynn County to itself, and were estimated with an econometric equation that predicts local purchases based on the county's unique characteristics. In addition, the entire analysis was conducted using the full range of industrial sectors in order to avoid aggregation bias. All dollar amounts are in 2017 dollars.

SPENDING IN GLYNN COUNTY

Nonresident Day Trippers

Day trippers are Island visitors who do not overnight in Glynn County. The first task was to estimate the number who were not residents of Glynn County, based on data supplied by the Jekyll Island Authority on the number of paid gate crossings. In 2016, the Authority issued 442,634 daily/weekly passes, which represent the number of unique gate crossings by paying parties. In addition, there were 134,406 re-entry passes. It is assumed that residents, long-stay visitors and others sensibly purchased annual passes instead of daily/weekly ones. Moreover, it was assumed that day trippers and short-stay visitors did not buy annual passes. The Selig Center's survey of visitors shows the average party size is three. Thus, 1,338,790 persons (442,634 parties multiplied by 3 per party) entered Jekyll Island with daily/weekly passes. The survey shows that 46.4 percent—550,242 guests—were day visitors and 58.9 percent—788,547 guests—were short-stay visitors.

Our analysis of the survey responses shows that non-residents of Glynn County account for 46.1 percent of day trippers. Accordingly, 255,549 of the 550,242 day trippers were not Glynn County residents. On average, the survey shows each nonresident day tripper spent \$46.95 in Glynn County. The final step in estimating spending by this group was to multiply the number of nonresident day trippers (255,549) by their average expenditures (\$46.95). Collectively, they spent \$12 million in Glynn County in 2016.

Nonresident Short-Stay Visitors

These visitors spend one or more nights in Glynn County, and according to the survey, nonresidents account for 99 percent (780,923) of the 788,547 short-stayers. On average, the survey shows that each of these visitors stays for 5 days and spends \$109.87 per day. The final step in estimating spending by non-resident short-stay visitors was to multiply the number of these visitors (780,923 guests) by their average length of stay (5 days) by their average daily expenditures (\$109.87). Collectively, nonresident short-stayers spent \$429 million in Glynn County in 2016.

Nonresident Long-Stay Visitors

These visitors spend more than 30 days on the Island but are not permanent residents of Jekyll Island. The Jekyll Island Authority's data show that there were 380 long-stay visitor parties, including 258 parties in campsites with full hook-ups and 122 parties in rental properties. The Selig Center's analysis indicates that the average long-stay visitor party spent 6.8 percent of their annual income in Glynn County. The average party size is 2.1 persons, and the average length of stay is 83 days. In addition, the survey shows that the average of the midrange income values reported for long-stay visitors is \$101,923. So, to estimate their spending, we multiplied the number of long-stay visitors (380) by average income levels (\$101,923), by the 6.8 percent of their income spent in Glynn County Collectively, long-stay visitors spent \$2.6 million in Glynn County.

Permanent Residents of Jekyll Island

Data obtained from the Jekyll Island Authority show that permanent residents occupy 268 homes on Jekyll Island. Based on 220 responses from the survey of residents, the Selig Center estimates that the average income of resi-

dent households is \$130,455, which is reasonable given that the average household income in Glynn County was 104,270 in 2015. So, we estimate that the total income of 268 resident households is \$34,961,818, which constitutes the initial round of economic impact. The subsequent round of economic impact includes only the portion of income actually spent in the county based on Glynn County's regional purchase coefficients.

Nonresident Homeowners

Data from the Jekyll Island Authority show that there are 575 homeowners who do not live on Jekyll Island, including 260 owners of second homes and 315 owners of rentals. The Selig Center's analysis of the 175 homeowners who responded to the survey and provided both income and spending data indicates that the average homeowner spent \$39,158 in Glynn County in 2016. That represents 18.3 percent of their average income of \$214,286, and seems very reasonable given that the average nonresident homeowner spent approximately 90 days on Jekyll Island. Then, after multiplying the number of nonresident homeowners (575) by their average spending in Glynn County (\$39,158), we determined that this group spent \$22.5 million in Glynn County in 2016.

RESULTS

Total Output Impact

The output impact was calculated for each category of spending, based on the impact of the initial expenditures and the impacts generated by the re-spending of these amounts (the multiplier effect). The total output impacts for are reported in the second column of Table 1. The total output impact of Jekyll Island is \$700 million in 2016. This amount represents the combined impact of spending in Glynn County by nonresident day trippers, nonresident short-stay visitors, nonresident long-stay visitors, nonresident homeowners and residents. Out of the \$700 million, \$586 million (84 percent) results from spending by short-term visitors; \$67 million (10 percent) is from spending by the Island's permanent residents; \$29 million (4 percent) results from spending by homeowners who do not live on Jekyll; \$15 million (2 percent) results from spending by

Table 1
Economic Impact of Jekyll Island on Glynn County, Georgia
(2017 dollars and jobs)

<u>Expenditure Category</u>	<u>Initial Spending</u>	<u>Output Impact</u>	<u>Value Added Impact</u>	<u>Labor Income Impact</u>	<u>Employment Impact (jobs)</u>
Day trippers	11,997,772	14,936,714	8,185,162	5,214,512	209
Short--stay visitors	429,009,606	586,078,725	336,911,002	190,228,837	6,435
Long--stay visitors	2,648,821	3,618,849	2,080,318	1,174,602	40
Homeowners	22,515,604	28,678,357	15,856,491	8,019,541	233
Residents	34,961,818	66,599,648	53,261,207	43,818,181	253
Total	501,133,621	699,912,293	416,294,180	248,455,673	7,170

Source: Selig Center for Economic Growth, Terry College of Business, University of Georgia, 2017.

Table 2
Economic Impact of Jekyll Island on Employment in Glynn County
(full- and part-time jobs)

<u>Expenditure Category</u>	<u>Direct Employment Impact</u>	<u>Indirect Employment Impact</u>	<u>Induced Employment Impact</u>	<u>Total Employment Impact</u>
Day trippers	167	19	22	209
Short-stay visitors	4,838	780	817	6,435
Long-stay visitors	30	5	5	40
Homeowners	155	44	34	233
Residents	167	48	38	253
Total	5,357	896	916	7,170

Source: Selig Center for Economic Growth, Terry College of Business, University of Georgia, 2017.

day trippers; and \$4 million (less than 1 percent) comes from spending by long-stay visitors.

Of the total output impact, \$501 million (72 percent) is initial spending and \$199 million (28 percent) is the multiplier impact of those initial expenditures. Dividing the total output impact by initial spending yields an average multiplier value of 1.40, so on average, every dollar of

initial spending generates an additional 40 cents for Glynn County's economy. The output impact is 1.40 times greater than initial spending. The multiplier values are low because Glynn County's economy is relatively small, so there is a very high level of leakage. Leakages are any payments made to imports or value-added sectors, which in turn do not re-spend the dollars in the county.

Value-Added Impact

Because value-added impacts exclude expenditures related to foreign and domestic trade, they provide a much more accurate measure of the actual economic benefits flowing to businesses and households in a region. The impacts measured in terms of value added are reported in the third column of Table 1. Jekyll Island generates a value-added impact of \$416 million, which is 12 percent of the value added generated in Glynn County.

Labor Income Impact

The IMPLAN model also was used to calculate impacts in terms of labor income, as reported in the fourth column of Table 1. Jekyll Island generates a labor income impact of \$248 million.

Employment Impact

The economic impact of Jekyll Island is most easily understood in terms of its effects on employment (column 5 of Table 1). Jekyll Island generates an employment impact of 7,170 full- and part-time jobs, which accounts for 15 percent of all the jobs in Glynn County, or one job in

seven. Table 6 reports the employment impacts by impacted industry and shows that most of the jobs that owe their existence to Jekyll Island (88 percent) are in three economic sectors: accommodation and food services, services (including government), and retail/wholesale trade. Jekyll Island supports modest numbers of jobs in finance, insurance, real estate, information, and construction, but does not have very many jobs in agriculture, forestry, fishing, mining, quarrying, manufacturing, or utilities.

Tax Revenue Impact

The economic impact of Jekyll Island on tax revenues collected by local governments is \$29 million.

FINDINGS

The fundamental finding is that Jekyll Island will continue to generate a significant, sustainable, annual (recurring) economic impact on Glynn County, including: \$700 million in sales (output); \$416 million in production (value added); \$248 million in labor income (earnings); \$29 million in tax revenue for local government; and 7,120 jobs. ■

Table 3
Local Government Tax Revenue Impacts of Jekyll Island in Glynn County
(2017 dollars)

<u>Expenditure Category</u>	<u>Tax Revenue</u>
Day trippers	477,275
Short-stay visitors	23,823,929
Long-stay visitors	330,464
Homeowners	2,083,712
Residents	2,396,119
Total	29,111,499

Source: Selig Center for Economic Growth, Terry College of Business, University of Georgia, 2017.

Table 4
Jekyll Island Visitors and Spending in Glynn County

<u>Category</u>	<u>Data and Spending</u>
Day Trippers and Short-Stay Visitors	
Unique gate crossings	442,634
Average party size	3
Total number of visitors	1,338,790
Day Trippers	
Number	550,242
Percent	41.1
Nonresidents of Glynn County	255,549
Percent	46.4
Average daily spending per visitor (\$)	46.95
Total spending (\$)	11,997,772
Short-Stay Visitors	
Number	788,547
Percent	58.9
Nonresident short-stay visitors	780,923
Percent	99.0
Average daily spending per visitor (\$)	109.87
Average length of stay (days)	5
Total spending (\$)	429,009,606
Long-Stay Visitors	
Number of parties	380
Length of stay (days)	30+
Average spending per party (\$)	6,971
Total spending (\$)	2,648,821

Source: Selig Center for Economic Growth, Terry College of Business, University of Georgia, 2017.

Table 5
Jekyll Island's Residents' and Nonresident Homeowners'
Income and Spending in Glynn County
(2017 dollars)

<u>Category</u>	<u>Income and Spending</u>
Number of home addresses	843
Permanent residents	
Resident occupied homes	268
Average household income (\$)	130,455
Total household income (\$)	34,961,818
Nonresident homeowners	
Second homes	260
Rental homes	315
Total	575
Average spending (\$)	39,158
Total spending (\$)	22,515,60s

Source: Selig Center for Economic Growth, Terry College of Business, University of Georgia, 2017.

Table 6
Economic Impact of Jekyll Island By Industry in Glynn County
(jobs)

<u>Impacted Industry</u>	<u>Total</u>	<u>Percent of Total</u>
Accommodations and food services	4,106	57.3
Services (including government)	1,562	21.8
Retail and wholesale trade	647	9.0
Transportation and warehousing	441	6.2
Finance, insurance, and real estate	289	4.0
Information	45	0.6
Construction	41	0.6
Manufacturing	14	0.2
Utilities	13	0.2
Ag., forestry, fishing, mining	12	0.2
Total	7,170	100.0

Source: Selig Center for Economic Growth, Terry College of Business, University of Georgia, 2017.

PART 2
Appendices 1-5

Appendix 1

Economic Impact of the Jekyll Island Authority's Spending on Glynn County

Spending by the Jekyll Island Authority generates significant, sustainable, annual (recurring) economic impacts for Glynn County. Because spending by visitors and residents generates most of the revenue that supports the Authority's spending, the economic impact of such spending is already included in the overall economic impact estimates in this report. The estimates reported in this appendix therefore should not be added to the overall estimates reported in Tables 1 through 3, because the impacts reported here are a subset and adding them in again would double count some economic impacts.

The economic impacts of spending by the Jekyll Island Authority are estimated for three categories of spending: human resources, operations, and capital projects. The expenditures are for FY 2017 and were provided by the Jekyll Island Authority.

The economic impacts of \$25.2 million in initial spending by the Jekyll Island Authority on the State of Georgia includes: \$28.9 million in sales (output or gross receipts); \$21.9 million in production (value added); \$17.4 million in labor income (earnings); and 598 jobs.

Table A1
Economic Impact of the Jekyll Island Authority's Spending in Glynn County
(2017 dollars and jobs)

<u>Expenditure Category</u>	<u>Initial Spending</u>	<u>Output Impact</u>	<u>Value Added Impact</u>	<u>Labor Income Impact</u>	<u>Employment Impact (jobs)</u>
Human resources	11,804,336	22,404,995	17,895,273	14,755,204	538
Operations	11,598,866	4,534,496	3,000,695	1,990,196	45
Capital projects	1,782,101	1,978,277	962,849	645,239	15
Total	25,185,303	28,917,768	21,858,817	17,390,639	598

Source: Selig Center for Economic Growth, Terry College of Business, University of Georgia, 2017.

Appendix 2

Economic Impact of the Jekyll Island Convention Center on Glynn County

The Jekyll Island Authority indicates that the convention center generated 33,090 room nights in 2016. The survey of visitors indicates that the average party size was 3, which amounts to 99,270 nonresident visitor days/nights, with an average spending per visitor day of \$109.87. Multiplying 99,270 visitor days by \$109.87 yields nearly \$10.9 million in spending by overnight visitors who attended events at the convention center or by those who accompanied them. In addition to overnight visitors, the Selig Cen-

ter estimates that the convention center brought 32,485 nonresident day-trippers to Jekyll Island, who spent about \$1.5 million. In total, initial spending by convention center event attendees and their parties was \$12.4 million in 2016.

The economic impacts include: \$16.8 million in sales (output or gross receipts); \$9.8 million in production (value added); \$5.5 million in labor income (earnings); and 191 jobs.

Table A2-1
Jekyll Island Convention Center:
Spending by Event Attendees and Their Parties in Glynn County, 2016

<u>Category</u>	<u>Data and Spending</u>
Nonresident short-stay visitors	
Number of groups	81
Number of room nights	33,090
Average party size	3
Nonresident short-stay visitor days	99,270
Average daily spending (\$)	109.87
Total spending (\$)	10,906,795
Nonresident day trippers	
Ratio: day trippers to short-stay visitors	0.33
Nonresident day tripper days	32,485
Average daily spending (\$)	46.95
Total spending (\$)	1,525,175

Source: Selig Center for Economic Growth, Terry College of Business, University of Georgia, 2017.

(continued)

Table A2-2
Economic Impact of the Jekyll Island Convention Center
On Glynn County
(2017 dollars and jobs)

<u>Expenditure Category</u>	<u>Initial Spending</u>	<u>Output Impact</u>	<u>Value Added Impact</u>	<u>Labor Income Impact</u>	<u>Employment Impact (jobs)</u>
Day trippers	1,525,175	1,898,524	1,040,371	662,788	27
Short-stay visitors	10,906,795	14,900,225	8,805,500	4,836,246	164
Total	12,431,970	16,798,749	9,845,871	5,499,034	191

Source: Selig Center for Economic Growth, Terry College of Business, University of Georgia, 2017.

Appendix 3 Economic Impact of the 2016 Turtle Crawl on Glynn County

The Jekyll Island Authority indicates that 939 persons participated in the 2016 Turtle Crawl (based on ZIP code data provided by the Authority). Our estimates find that: 24.4 percent (687) of participants were Glynn County residents; 9.1 percent (256) of participants live in nearby counties and were probably day trippers; and 66.5 percent (1,873) were probably short-stay visitors. It was assumed that the average participant who was a day tripper made two trips to Glynn County, and that the average participant who was a short-stay visitor spent 3 days/nights in Glynn County.

The Selig Center’s survey of visitors indicates that average spending per day tripper is \$46.95 per trip. Multiplying 256 day trippers by 2 trips by \$46.95 per trip yields

\$24,071, which is how much was spent in Glynn County by day trippers at the Turtle Crawl.

The average spending per day by short-stay visitors is \$109.87. Multiplying 1,873 short-stay visitors by 3 days per visitor by \$109.87 per day yields \$617,460, which is how much was spent in Glynn County by short-stay visitors who participated in the 2016 Turtle Crawl. In total, initial spending by nonresidents who participated in the Turtle Crawl was \$641,531.

The economic impacts of \$641,531 in initial spending by nonresidents who participated in the 2016 Turtle Crawl on Glynn County includes: \$873,579 in sales (output or gross receipts); \$514,964 in production (value added); \$284,278 in labor income (earnings); and 10 jobs.

**Table A3-1
Turtle Crawl:
Spending by Event Attendees and Their Parties in Glynn County, 2016**

<u>Category</u>	<u>Data and Spending</u>
Total participants	939
Average party size	3
Total participants and parties	2,817
Total resident participants and others	687
Glynn County residents (percent)	24.4
Nonresident day trippers	256
Percent	9.1
Average number of trips per visitor	2
Average spending (\$)	46.95
Total spending (\$)	24,071
Short-stay visitors	1,873
Percent	66.5
Average length of stay	3
Average daily spending (\$)	109.87
Total spending (\$)	617,460

Source: Selig Center for Economic Growth, Terry College of Business, University of Georgia, 2017.

(continued)

Table A3-2
Economic Impact of the Turtle Crawl on Glynn County
(2017 dollars and jobs)

<u>Expenditure Category</u>	<u>Initial Spending</u>	<u>Output Impact</u>	<u>Value Added Impact</u>	<u>Labor Income Impact</u>	<u>Employment Impact (jobs)</u>
Day trippers	24,071	30,003	16,441	10,474	1
Short-stay visitors	617,460	843,576	498,523	273,804	9
Total	641,531	873,579	514,964	284,278	10

Source: Selig Center for Economic Growth, Terry College of Business, University of Georgia, 2017.

Appendix 4

Economic Impact of the 2016 Shrimp and Grits Festival on Glynn County

Based on an analysis of parking permits, the Jekyll Island Authority conservatively estimates that 45,000 attended the 2016 Shrimp and Grits Festival. The Authority also conducted a survey of attendees, and from an analysis of 802 respondents, the Selig Center estimates that: 20.3 percent (9,135) of attendees were Glynn County residents; 17 percent (7,650) were residents of nearby counties and were considered to be day trippers; and 62.7 percent (28,215) of attendees lived far enough away to be considered short-stay visitors who spent two days/nights attending the festival.

Our analysis indicates that the average day tripper spends \$46.95. Multiplying 7,650 day-trippers by \$46.95 yields \$359,168, which is how much was spent in Glynn County by day-trippers who attended the festival. In ad-

dition, we found that the average short-stay visitor spent \$109.87 per day. So multiplying 28,215 short-stay visitors by 2 days per visitor by \$109.87 per day yields \$6,199,964, which is how much was spent in Glynn County by festival-going short-stayers. In total, nonresidents who attended the 2016 Shrimp and Grits Festival spent \$6.6 million.

The economic impacts of spending by day trippers and short-stay visitors who attended the 2016 Shrimp and Grits Festival are reported in Table 2 of this appendix. The economic impacts of \$6.6 million in initial spending by nonresidents who attended the festival includes: \$8.9 million in sales (output or gross receipts); \$5.3 million in production (value added); \$2.9 million in labor income (earnings); and 99 jobs.

**Table A4-1
The Shrimp and Grits Festival:
Spending by Event Attendees in Glynn County, 2016**

<u>Category</u>	<u>Data and Spending</u>
Total participants	45,000
Total resident attendees	9,135
Glynn County residents (percent)	20.3
Nonresident day trippers	7,650
Percent	17.0
Average spending (\$)	46.95
Total spending (\$)	359,168
Short-stay visitors	28,215
Percent	62.7
Average length of stay	2
Average daily spending (\$)	109.87
Total spending (\$)	6,199,964
Source: Selig Center for Economic Growth, Terry College of Business, University of Georgia, 2017.	

(continued)

Table A4-2
Economic Impact of the Shrimp and Grits Festival on Glynn County
(2017 dollars and jobs)

<u>Expenditure Category</u>	<u>Initial Spending</u>	<u>Output Impact</u>	<u>Value Added Impact</u>	<u>Labor Income Impact</u>	<u>Employment Impact (jobs)</u>
Day trippers	359,168	447,180	245,050	156,114	6
Short-stay visitors	6,199,964	8,469,918	5,005,418	2,749,127	93
Total	6,559,132	8,917,098	5,250,468	2,905,241	99

Source: Selig Center for Economic Growth, Terry College of Business, University of Georgia, 2017.

Appendix 5 Jekyll Island's Economic Impact on Georgia

The economic impact of Jekyll Island on the state are not the same as its economic impact on Glynn County for two primary reasons. First, the statewide multipliers are larger because a smaller proportion of spending leaks out with each round of spending. Second, only spending originating from out-of-state sources generates net new economic impacts for the state's economy. In contrast, spend-

ing originating from outside Glynn County generates new economic impacts for Glynn County's economy.

These tables report the economic impacts of Jekyll Island on the state. These include: \$411 million in sales (output or gross receipts); \$240 million in production (value added); \$137 million in labor income (earnings); 4,001 jobs; and \$12 million in tax revenues for state government.

**Table A5-1
Jekyll Island's Out-of-State Visitors' and Homeowners' Spending
in Glynn County, 2016**

<u>Category</u>	<u>Data and Spending</u>
Day trippers	
Nonresidents of Glynn County	255,549
Out-of-state	78,296
Percent	30.6
Average spending (\$)	46.95
Total spending (\$)	3,675,991
Short-stay visitors	
Nonresidents of Glynn County	780,923
Out-of-state	407,343
Percent	52.2
Average length of stay	5
Average daily spending (\$)	109.87
Total spending (\$)	223,774,085
Long-stay visitors	
Number of parties	380
Out-of-state	363
Percent	5.7
Length of stay (days)	30+
Average spending (\$)	6,971
Total spending (\$)	2,533,807
Out-of-state homeowners	
Nonresidents of Glynn County	575
Out-of-state	341
Percent	59.4
Average spending (\$)	39,158
Total spending (\$)	13,372,358
Total out-of-state spending (\$)	243,356,241

Source: Selig Center for Economic Growth, Terry College of Business, University of Georgia, 2017.

(continued)

**Table A5-2
Jekyll Island's Economic Impact on Georgia
(2017 dollars and jobs)**

<u>Expenditure Category</u>	<u>Initial Spending</u>	<u>Output Impact</u>	<u>Value Added Impact</u>	<u>Labor Income Impact</u>	<u>Employment Impact (jobs)</u>
Day trippers	3,675,991	5,737,136	3,315,843	2,015,795	70
Short-stay visitors	223,774,085	377,334,834	221,738,818	125,907,341	3,720
Long-stay visitors	2,533,807	4,272,911	2,510,954	1,425,765	42
Homeowners	13,372,358	23,722,102	13,142,926	7,271,752	169
Total	243,356,241	411,066,983	240,708,541	136,620,653	4,001

Source: Selig Center for Economic Growth, Terry College of Business, University of Georgia, 2017.

**Table A5-3
Jekyll Island's Economic Impact on Employment in Georgia
(full- and part-time jobs)**

<u>Expenditure Category</u>	<u>Direct Employment Impact</u>	<u>Indirect Employment Impact</u>	<u>Induced Employment Impact</u>	<u>Total Employment Impact</u>
Day trippers	51	8	11	70
Short-stay visitors	2,524	535	661	3,720
Long-stay visitors	29	6	7	42
Homeowners	96	35	38	169
Total	2,700	584	717	4,001

Source: Selig Center for Economic Growth, Terry College of Business, University of Georgia, 2017.

**Table A5-4
Jekyll Island's Impact on State Government Tax Revenue
(2017 dollars)**

<u>Category</u>	<u>Tax Revenue Impact</u>
Day trippers	162,800
Short-stay visitors	11,208,836
Long-stay visitors	126,928
Homeowners	520,222
Total	12,018,786

Source: Selig Center for Economic Growth, University of Georgia, 2017.

PART 3
Jekyll Island Survey:
Details and Maps

Jekyll Island Survey: Key Findings

The Jekyll Island Survey collected information about visitor income, place of residence, length of stay, spending patterns, and other activities. The survey received 1,954 responses over the course of under two months. About 72 percent of respondents to the survey were vacationing on their most recent trip to Jekyll Island. One in five respondents were year-round Jekyll residents or nonresident homeowners. The remaining 5 percent were attending a convention or traveling for other business.

Jekyll Island draws visitors mainly from the Eastern Seaboard of the United States. Fifty-three percent of the survey respondents (visitors and nonresident homeowners) are Georgia residents. Other South Atlantic states make up over 14 percent of the group, followed by the residents from the Northeast and Midwest (roughly 11 percent each). Out of the remaining 11 percent, 7 percent reside in the East South-Central states and the West. Over 4 percent of survey respondents are residents of other countries.

While most of the day trippers and close to a half of the short-stay visitors to Jekyll Island live in Georgia, over 60 percent of long-stay visitors traveled to Jekyll Island from the Northeast and foreign countries (38 percent and 23 percent, respectively). Among nonresident homeowners, over 40 percent are Georgia residents, followed by residents of the Northeast with over 19 percent of respondents, and other South Atlantic states (16 percent of respondents).

Visitors

To estimate the economic impact of Jekyll Island's visitors, respondents were separated into three discrete groups based on their length of stay: day trippers, short-stay visitors (<30 nights), and long-stay visitors (>30 nights). Although visitors from Glynn County were excluded from economic impact

calculations for methodological reasons, their responses provided insights into the differences in characteristics, spending, and activities between local visitors and long-distance visitors.

Survey respondents included 295 visitors from Glynn County, 97 percent of whom did not stay overnight on their most recent visit to the island. Day trippers from areas other than Glynn County made up 235 of the respondents to the survey. 723 respondents stayed for less than 30 nights, classifying them as short-stay visitors. Over 50 percent of short-stay visitors stayed on the island for three to six nights. Very few short-stay visitors stayed on the island for over two weeks. Over 93 percent of short-stay visitors used overnight accommodations on Jekyll.

Only 186 respondents stayed for 30 nights or more. Long-stay visitors were more evenly distributed in terms of their length of stay. A little over one-third of long-stay visitors stayed from one to two months and 31 percent stayed for more than two months but less than three months. Another 31 percent stayed on Jekyll for over three months but less than six months. Only three long-stay visitors remained on the island for more than 180 days.

Most visitors to Jekyll Island were on vacation. Over 93 percent of day trippers, short-stay, and long-stay visitors were on vacation during their most recent visit to Jekyll Island. Over 80 percent of Glynn County residents were on vacation during their most recent visit, but a relatively larger proportion (14 percent) traveled to the island for business.

Jekyll Island was the primary destination of most survey respondents. Almost all long-stay visitors (over 98 percent) said that Jekyll Island was their primary destination. Day trippers had the greatest proportion of respondents (over 60 percent) who said that Jekyll Island was not their primary destination. If Jekyll Island was not available as a destination, over 65

percent of Glynn County residents would visit other destinations in Glynn. Over 75 percent of day trippers from other areas would visit other destinations within Georgia, more than half of whom would visit within Glynn. Only 6 percent of long stay visitors would visit other destinations in Glynn County. Almost all long stay visitors (88 percent) would visit destinations outside of Georgia.

Annual household income was similar across Glynn County residents, day trippers, short-stay and long-stay visitors, with the highest proportion of visitors making \$50,000 to \$100,000 per year. One in five Glynn residents, day trippers, and short-stay visitors made over \$150,000, while only one in ten long-stay visitors were in this upper income bracket. Under 10 percent of long-stay visitors made less than \$50,000 per year. Day trippers had the largest proportion of lower-income respondents with 18 percent making less than \$50,000 per year.

Across all groups, average party size on the most recent trip to Jekyll Island was 2.9. Just under 50 percent of short-stay visitors had three or more people in their party on their most recent visit. Glynn County residents were slightly more likely to travel alone to Jekyll Island than respondents from the other three groups.

Place of residence appeared to affect length of stay. Georgia residents were more likely to visit for shorter periods of time. Just under 70 percent of day trippers were from Georgia, outside of Glynn County. Only eight Georgia residents stayed on Jekyll for over one month. Over 50 percent of short-stay visitors were from another state or country. Only 28 percent of day trippers were from another state, while 72 percent of long-stay visitors were from another state. Most foreign visitors stayed for 30 nights or more.

Most Glynn County residents, day trippers, and short-stay visitors did not attend special events on their most recent

visit to Jekyll. Over 76 percent of long-stay visitors attended special events, but most did not attend the Turtle Crawl or Shrimp and Grits Festival.

Year-Round Residents and Nonresident Homeowners

Seventy-seven percent of year-round respondents own a home on Jekyll Island; 78 percent of whom had an annual household income of \$150,000 per year or less. Only 7 percent of year-round residents earned over \$250,000. Nonresident homeowners had a very different income distribution from visitors and year-round residents. Only 3 percent of nonresident homeowners made less than \$50,000 per year; 20 percent made between \$50,000 and \$100,000. The most significant difference between nonresident homeowners and all other respondents was the proportion who made over \$250,000 per year, which was 25 percent.

Most nonresident homeowners have a primary residence in another state. Over 33 percent live in Georgia, outside of Glynn County. About one-third of nonresident homeowners stay on the island for three to six months per year. Over 30 percent stay on the island for a month or less per year. Over 44 percent of nonresident homeowners spend 10 percent or less of their income on Jekyll Island. Very few of them spend more than 40 percent of their income on Jekyll Island.

Nonresident homeowners ranked Jekyll's location and services as more important to their decision to live in Glynn County than year-round residents. Eighty-three percent of nonresident homeowners claimed that Jekyll Island's location and services were very important or extremely important to their decision to live in Glynn County, while 77 percent of year-round residents ranked Jekyll's location and services as very or extremely important. Only 7 percent of year-round residents claimed that Jekyll's location and services were very unimportant or not at all important to their decision. ■

Respondents By Geography

Respondents by Primary Residence

Where is your primary residence?

	Number	Percent
All responses	1,872	100
Georgia:		
Jekyll Island	231	12
Georgia, Glynn County	295	16
Georgia, outside of Glynn County	585	31
Another state	697	37
Another country	64	3

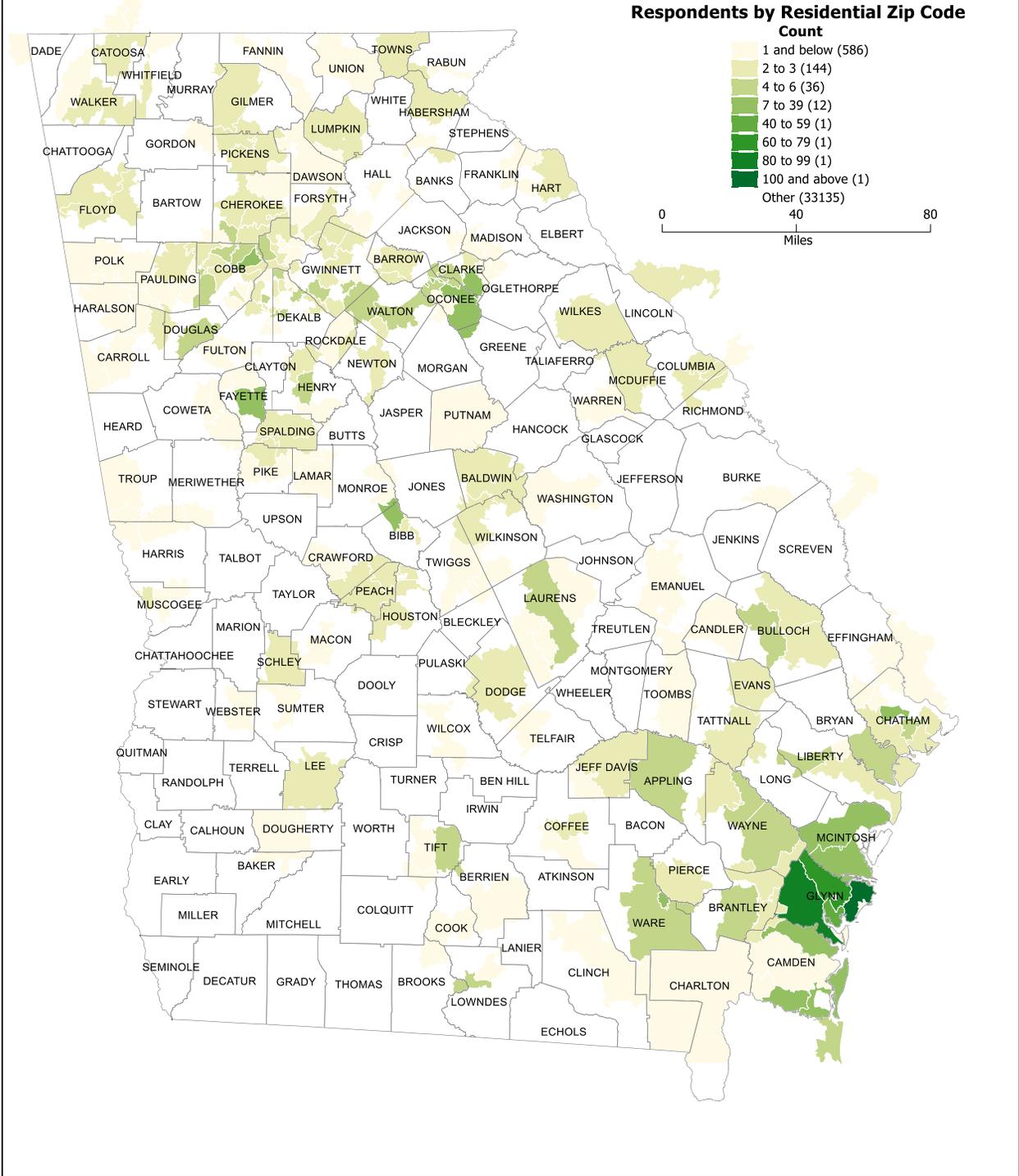
Respondents By Geography

Nonresident Respondents by Region of Primary Residence and Category

Region	Number of Respondents	Percent of Region	Percent of Total
Georgia	823	100	53.0
Day trips	392	47.6	
Short stay	345	41.9	
Nonresident homeowner	77	9.4	
Long stay	9	1.1	
South Atlantic	219	100	14.1
Short stay	137	46.3	
Day trips	34	40.9	
Nonresident homeowner	31	10.4	
Long stay	17	2.5	
Northeast	173	100	11.1
Long stay	70	40.5	
Short stay	56	32.4	
Nonresident homeowner	37	21.4	
Day trips	10	5.8	
Midwest	166	100	10.7
Short stay	85	51.2	
Long stay	38	22.9	
Nonresident homeowner	28	16.9	
Day trips	15	9.0	
East South Central	77	100	5.0
Short stay	62	3.8	
Nonresident homeowner	7	16.7	
Day trips	5	6.0	
Long stay	3	3.6	
West	24	100	1.5
Short stay	13	54.2	
Day trips	2	8.3	
Long stay	2	8.3	
Nonresident homeowner	7	29.2	
West South Central	7	100	0.5
Short Stay	5	71.4	
Long Stay	2	28.6	
International	63	100	4.1
Long Stay	42	66.7	
Short Stay	12	19.0	
Day Trips	5	7.9	
Nonresident Homeowner	4	6.3	
Total	1,552	NA	100

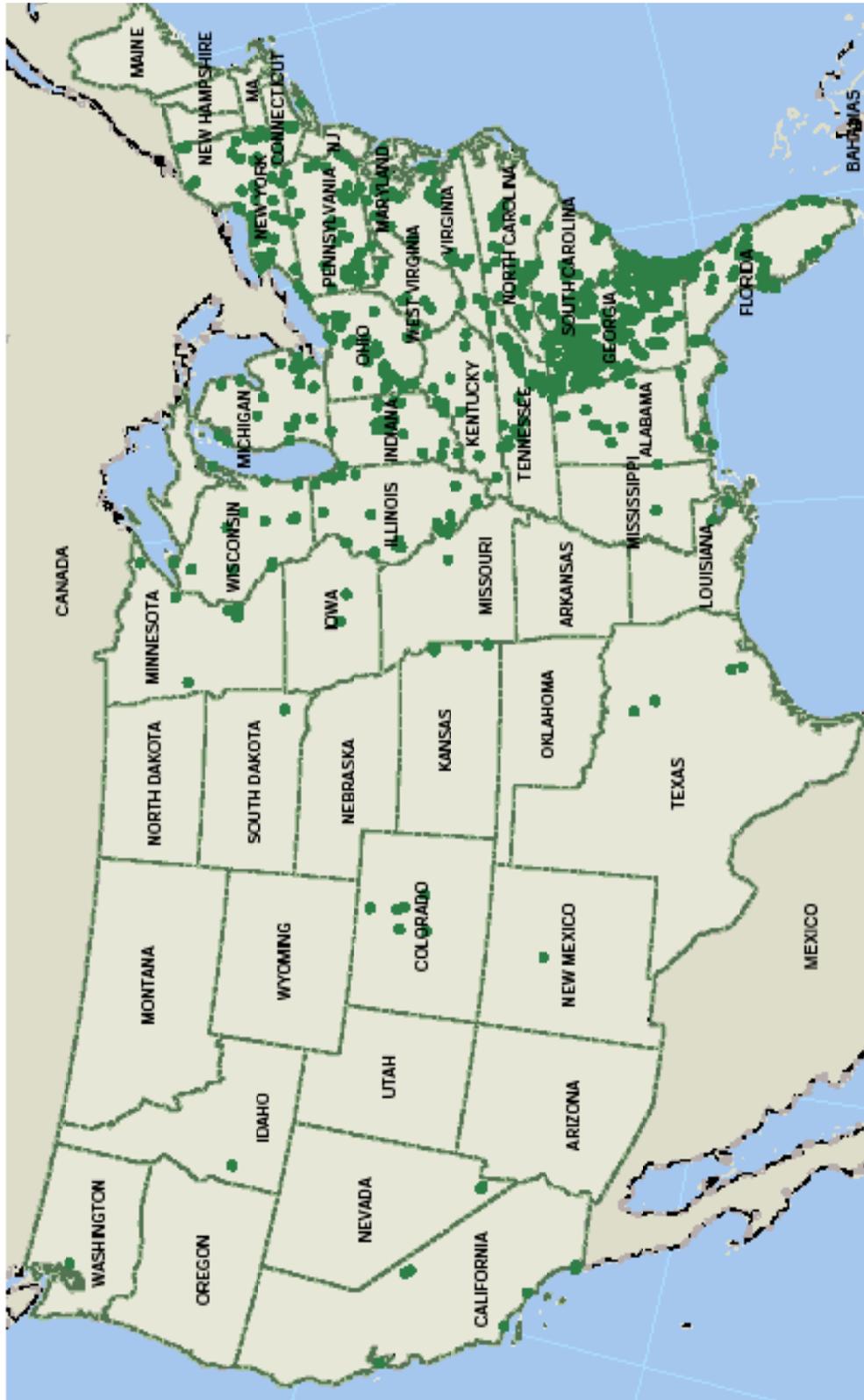
Respondents By Geography

Survey Respondents by Residential Zip Code



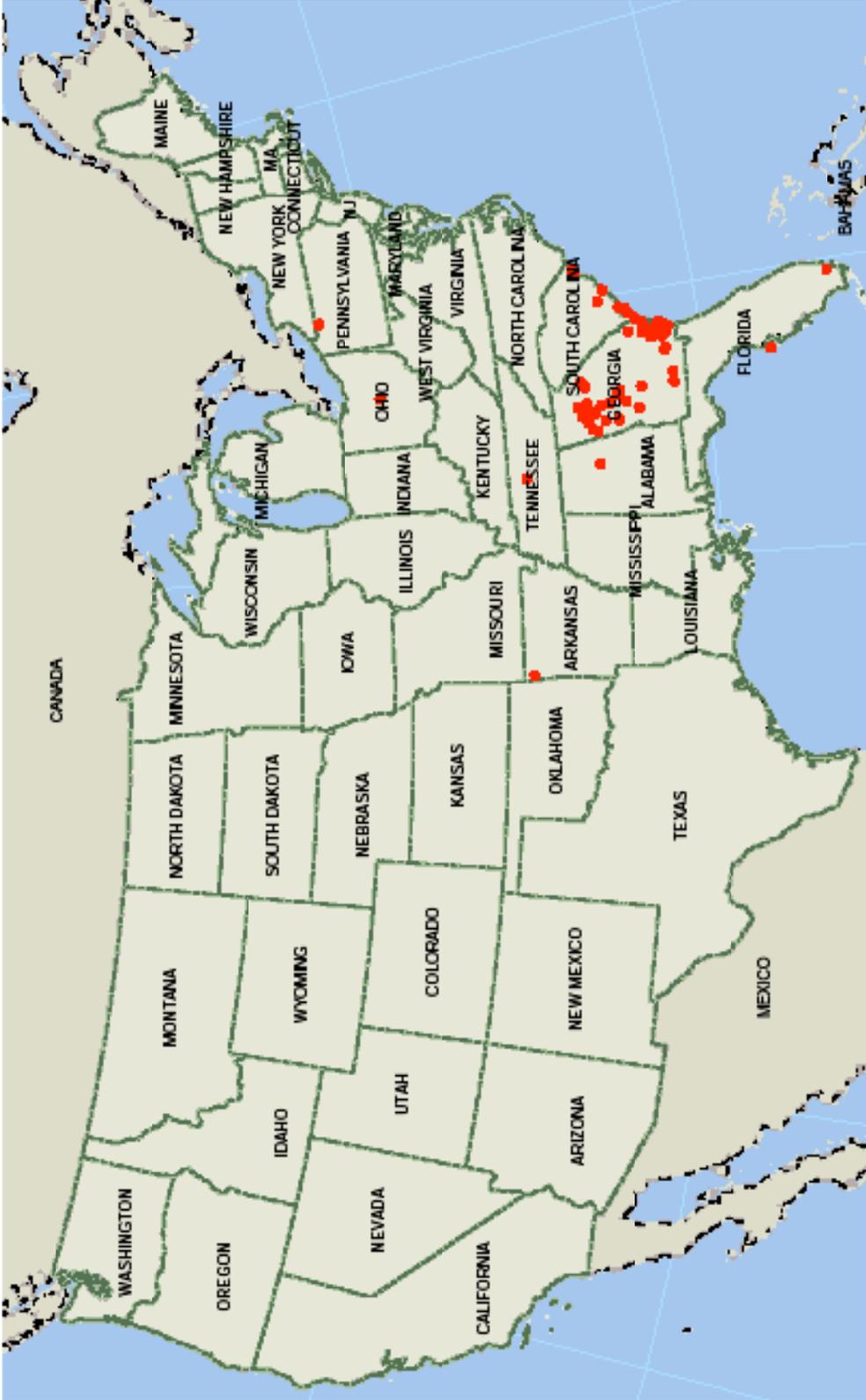
Respondents By Geography

Survey Respondents by Primary Residence: Vacationers



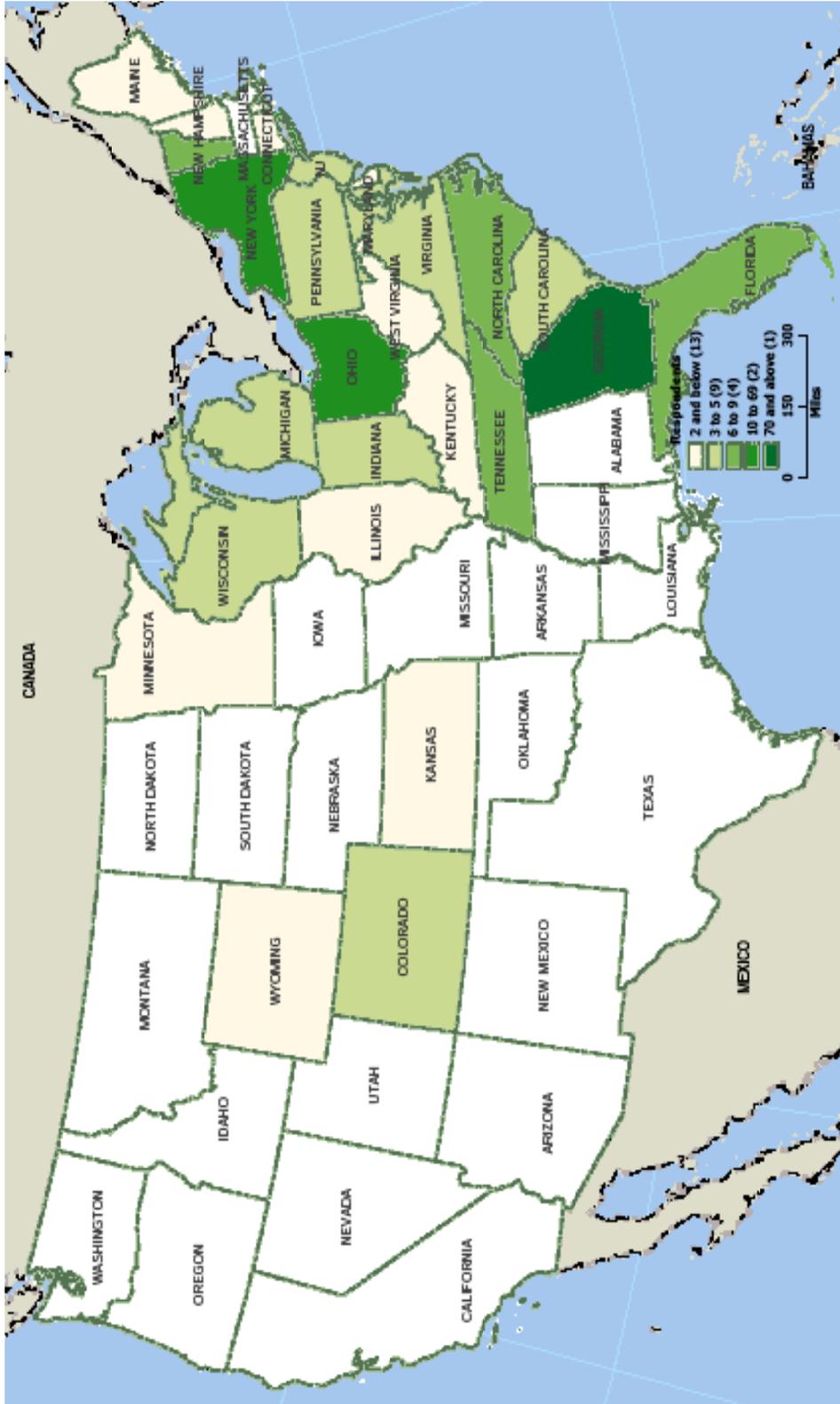
Respondents By Geography

Survey Respondents by Primary Residence: Business Travelers



Respondents By Geography

Survey Respondents by Primary Residence: Nonresident Homeowners



Selected Statistics

Selected Survey Statistics¹

Day Trips (visitors from outside of Glynn County)	
Average spending in Glynn County, per person per day ²	\$46.90
Average party size	2.9
Average length of stay	NA
Day Trips (Glynn County residents)	
Average spending on Jekyll Island, per person per day ²	\$24.70
Average party size	2.9
Average length of stay	NA
Short Stay	
Average spending in Glynn County per person per day ^{2*}	\$109.90
Average party size	3.2
Average length of stay (days)	5
Long Stay	
Average spending in Glynn County, per party ^{2*}	\$6,970
Average party size	2.1
Average income	101,785
Average length of stay (days)	85.3
Nonresident Homeowers	
Average spending in Glynn County, per party ²	\$39,158
Average household income	\$214,286
Average length of stay (days)	90
Year-Round Residents of Jekyll Island	
Average household income	\$130,455

Notes:

¹ Averages exclude statistical outliers, and are based on selections of records containing data necessary for calculations.

² Total spending in Glynn County expressed in 2017 dollars.

* Excludes Glynn County residents.

Selected Statistics

Spending¹ by Respondent Category

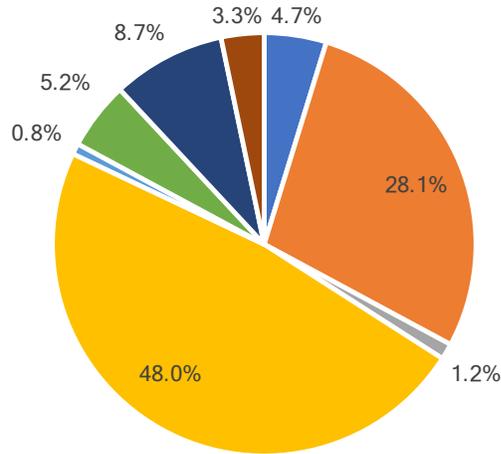
Day trips	Number	Percent
Spending in Glynn County*	221	100.0
\$10 or less	7	3.2
\$11 - \$20	15	6.8
\$21 - \$50	41	18.6
\$51 - \$100	57	25.8
\$101 - \$200	46	20.8
\$200+	55	24.9
Spending on Jekyll Island (Glynn County residents)	218	100.0
\$10 or less	65	29.8
\$11 - \$20	60	27.5
\$21 - \$50	64	29.4
\$51 - \$100	23	10.6
\$101 - \$200	6	2.8
\$200+	0	0.0
Short stay visitors (spending in Glynn County)*	694	100.0
\$100 or less	10	1.4
\$101 - 300	47	6.8
\$301 - 500	64	9.2
\$501 - 1000	161	23.2
\$1001 - 2000	207	29.8
\$2000+	205	29.5
Long stay visitors (spending in Glynn County)*	178	100.0
\$1000 or less	6	3.4
\$1,001 - \$2,000	12	6.7
\$2,001 - \$3,000	11	6.2
\$3,001 - \$5,000	44	24.7
\$5,001 - \$10,000	71	39.9
More than \$10,000	34	19.1

¹Spending expressed in 2017 dollars, based on selections of records containing data necessary for spending calculations.

*Excludes Glynn County residents.

Selected Statistics

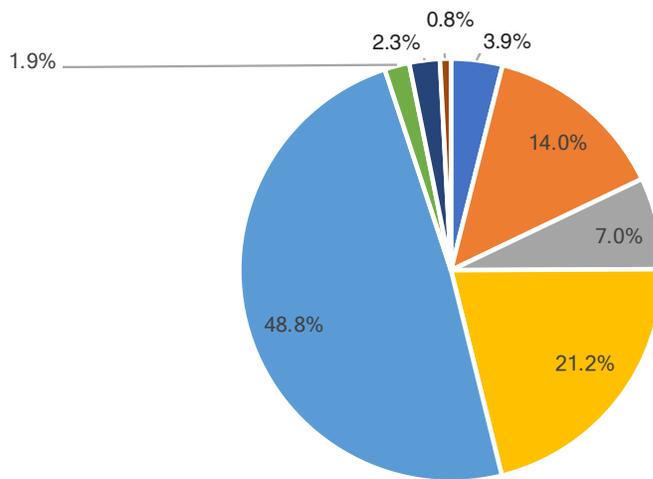
Day Trip Visitors: Spending in Glynn County by Category



■ Transportation
 ■ Shopping
 ■ Rentals
 ■ Eating and drinking
 ■ Lodging
 ■ Entertainment
 ■ Activities
 ■ OTHER

Excludes Glynn County residents.

Short Stay Visitors: Spending in Glynn County by Category



■ Transportation
 ■ Shopping
 ■ Rentals
 ■ Eating and drinking
 ■ Lodging
 ■ Entertainment
 ■ Activities
 ■ OTHER

Excludes Glynn County residents.

Survey Frequencies

Overall Crosstabulations

All Respondents

Which category best describes your experience on Jekyll Island?

	Number	Percent
Vacation/leisure travel	1361	71.8
Attending convention at Convention Center	43	2.3
Other business travel	61	3.2
Year-round resident (JI primary residence)	231	12.2
Nonresident homeowner	199	10.5
Total	1895	100

Respondents by Stay Length and Residence

Respondent Category	Glynn Residents		Non-Glynn Residents		Total	
	Number	Percent	Number	Percent	Number	Percent
Visitors	279	19.7	1136	80.3	1415	100.0
Day Trippers	271	53.6	235	46.4	506	100.0
Short Stay	7	1.0	716	99.0	723	100.0
Long Stay	1	0.5	185	99.5	186	100.0
Nonresident homeowner	14	7.1	183	92.9	197	100.0
Year-round Jekyll residents	231	100.0	0	0.0	231	100.0

Jekyll Island Residents

Year-Round Jekyll Residents

	Number	Percent
Do you own a home on Jekyll Island?	231	100.0
Yes	178	77.1
No	53	22.9
Your annual household income range	220	100.0
Less than \$50,000	37	16.8
\$50,000 - \$100,000	75	34.1
\$100,001 - \$150,000	60	27.3
\$150,001 - \$200,000	22	10.0
\$200,001 - \$250,000	10	4.5
Over \$250,000	16	7.3
Importance of Jekyll Island's location and services to your decision to live in Glynn County	226	100.0
Not at all important	7	3.1
Very unimportant	10	4.4
Neither important /unimportant	34	15.0
Very important	91	40.3
Extremely important	84	37.2

Glynn County Residents

Glynn County Residents

	Number	Percent
Which category best describes your experience on Jekyll Island?	295	100.0
Vacation/leisure travel	238	80.7
Attending convention at the Convention Center	11	3.7
Other business travel	32	10.8
Year-round resident (JI primary residence)	0	0.0
Nonresident homeowner	14	4.7
Do you own a home on Jekyll Island?	281	100.0
Yes	0	0.0
No	281	100.0
Select your annual household income range	279	100.0
Less than \$50,000	42	15.1
\$50,001 - \$100,000	109	39.1
\$100,001 - \$150,000	68	24.4
\$150,001 - \$200,000	28	10.0
\$200,001 - \$250,000	19	6.8
Over \$250,000	13	4.7
Where is your primary residence?	295	100.0
Georgia, Glynn County	295	100.0
Georgia, outside of Glynn County	0	0.0
Another state	0	0.0
Another country	0	0.0
Was Jekyll Island a primary destination for your most recent visit?	269	100.0
Yes	222	82.5
No	47	17.5
How long was your most recent visit to Jekyll Island?	279	100.0
Day trip	271	97.1
Overnight trip	8	2.9
Within Overnight Trip	8	100.0
Short stay	7	87.5
Long stay	1	12.5
During your most recent visit to Jekyll Island, how many people were in your party?	277	100.0
1	50	18.1
2	112	40.4
3 - 4	82	29.6
5 - 7	24	8.7
8 or more	9	3.2

(continued)

Glynn County Residents

Glynn County Residents (Continued)

	Number	Percent
During your most recent visit, did you use overnight accommodations on Jekyll Island?	8	100.0
Yes	7	87.5
No	1	12.5
During your most recent visit, did you attend any special events on Jekyll Island?	279	100.0
Turtle Crawl	0	0.0
Shrimp and Grits	14	5.0
Other	60	21.5
Did not attend special events	205	73.5
If Jekyll Island were unavailable as a destination, you'd most likely substitute:	192	100.0
Other destinations in Glynn County	126	65.6
Other destinations in Georgia, outside of Glynn County	32	16.7
Destinations in other states or countries	34	17.7
How important are Jekyll Island's location and services to your decision to live or own property in Glynn County?	14	100.0
Not at all important	0	0.0
Very unimportant	0	0.0
Neither important nor unimportant	4	28.6
Very important	3	21.4
Extremely important	7	50.0

Day Trippers

Responents by Primary Residence: Day Trips

Area	Number	Percent
Georgia	392	84.7
South Atlantic	34	7.3
Florida	21	4.5
South Carolina	4	0.9
Virginia	4	0.9
North Carolina	2	0.4
Maryland	2	0.4
West Virginia	1	0.2
Midwest	15	3.2
Ohio	5	1.1
Michigan	4	0.9
Illinois	2	0.4
Indiana	1	0.2
Minnesota	1	0.2
Missouri	1	0.2
Iowa	1	0.2
Northeast	10	2.2
New York	4	0.9
Pennsylvania	2	0.4
New Hampshire	1	0.2
Connecticut	1	0.2
Massachusetts	1	0.2
Vermont	1	0.2
East South Central	5	1.1
Tennessee	2	0.4
Alabama	2	0.4
Kentucky	1	0.2
International	5	1.1
West	2	0.4
California	1	0.2
Washington	1	0.2
Total	463	100.0

Day Trippers

Day Trippers (Including Glynn County)

	Number	Percent
Which category best describes your experience on Jekyll Island?	235	100.0
Vacation/leisure travel	223	94.9
Attending convention at the JI Convention Center	4	1.7
Other business travel	8	3.4
Year-round resident (JI primary residence)	0	0.0
Nonresident homeowner	0	0.0
Do you own a home on Jekyll Island?	235	100.0
Yes	0	0.0
No	235	100.0
Please select your annual household income range	225	100.0
Less than \$50,000	42	18.7
\$50,001 - \$100,000	89	39.6
\$100,001 - \$150,000	46	20.4
\$150,001 - \$200,000	22	9.8
\$200,001 - \$250,000	14	6.2
Over \$250,000	12	5.3
Where is your primary residence?	235	100.0
Georgia, Glynn County	0	0.0
Georgia, outside of Glynn County	163	69.4
Another state	67	28.5
Another country	5	2.1
Was Jekyll Island a primary destination for your most recent visit?	231	100.0
Yes	140	60.6
No	91	39.4
How long was your most recent visit to Jekyll Island?	235	100.0
Day trip	235	100.0
Overnight trip	0	0.0
During your most recent visit to Jekyll Island, how many people were in your party?	234	100.0
1	22	9.4
2	103	44.0
3 - 4	71	30.3
5 - 7	33	14.1
8 or more	5	2.1

(continued)

Day Trippers

Day Trippers (Continued) (Including Glynn County)

	Number	Percent
During your most recent visit, did you use overnight accommodations on Jekyll Island?	235	100.0
Yes	0	0.0
No	235	100.0
During your most recent visit, did you attend any special events on Jekyll Island?	233	100.0
Turtle Crawl	1	0.4
Shrimp and Grits	8	3.4
Other	35	15.0
Did not attend special events	189	81.1
If Jekyll Island were not available as a destination, you would most likely substitute:	131	100.0
Other destinations in Glynn County	51	38.9
Other destinations in Georgia, outside of Glynn County	44	33.6
Destinations in other states or countries	36	27.5

Short Stay

Responents by Primary Residence: Short Stay

Area	Number	Percent
Georgia	345	48.3
South Atlantic	137	19.2
Florida	49	6.9
South Carolina	32	4.5
North Carolina	25	3.5
Virginia	16	2.2
West Virginia	9	1.3
Maryland	5	0.7
Delaware	1	0.1
Midwest	85	11.9
Ohio	28	3.9
Illinois	17	2.4
Michigan	12	1.7
Indiana	10	1.4
Wisconsin	5	0.7
Minnesota	4	0.6
Missouri	3	0.4
Kansas	4	0.6
Iowa	2	0.3
East South Central	62	8.7
Tennessee	38	5.3
Kentucky	12	1.7
Alabama	11	1.5
Mississippi	1	0.1
Northeast	56	7.8
Maine	1	0.1
New Hampshire	1	0.1
Rhode Island	1	0.1
Connecticut	3	0.4
Massachusetts	3	0.4
Vermont	3	0.4
New Jersey	4	0.6
New York	14	2.0
Pennsylvania	26	3.6

(continued)

Short Stay

Responents by Primary Residence: Short Stay (Continued)

Area	Number	Percent
West	13	1.8
Colorado	6	0.8
California	4	0.6
Nevada	2	0.3
Idaho	1	0.1
International	12	1.7
West South Central	5	0.7
Texas	3	0.4
Louisiana	2	0.3
Total	715	100.0

Short Stay

Short Stay Visitors

	Number	Percent
Which category best describes your experience on Jekyll Island?	723	100.0
Vacation/leisure travel	677	93.6
Attending convention at the JI Convention Center	27	3.7
Other business travel	19	2.6
Year-round resident (JI primary residence)	0	0.0
Nonresident homeowner	0	0.0
Do you own a home on Jekyll Island?	723	100.0
Yes	0	0.0
No	723	100.0
Please select your annual household income range	694	100.0
Less than \$50,000	84	12.1
\$50,001 - \$100,000	274	39.5
\$100,001 - \$150,000	189	27.2
\$150,001 - \$200,000	77	11.1
\$200,001 - \$250,000	25	3.6
Over \$250,000	45	6.5
Where is your primary residence?	723	100.0
Georgia, Glynn County	7	1.0
Georgia, outside of Glynn County	343	47.4
Another state	361	49.9
Another country	12	1.7
Was Jekyll Island a primary destination for your most recent visit?	696	100.0
Yes	623	89.5
No	73	10.5
How long was your most recent visit to Jekyll Island?	723	100.0
Day trip	0	0.0
Overnight trip	723	100.0
How long was your most recent visit to Jekyll Island? (within overnight trip)	723	100.0
1 - 2 nights	127	17.6
3 - 6 nights	373	51.6
7 - 14 nights	204	28.2
15 - 21 nights	10	1.4
22 - 29 nights	9	1.2

(continued)

Short Stay

Short Stay Visitors (Continued)

	Number	Percent
During your most recent visit to Jekyll Island, how many people were in your party?	720	100.0
1	35	4.9
2	328	45.6
3 - 4	194	26.9
5 - 7	101	14.0
8 or more	62	8.6
During your most recent visit, did you use overnight accommodations on Jekyll Island?	720	100.0
Yes	673	93.5
No	47	6.5
During your most recent visit, did you attend any special events on Jekyll Island?	719	100.0
Turtle Crawl	15	2.1
Shrimp and Grits	28	3.9
Other	117	16.3
Did not attend special events	559	77.7
If Jekyll Island were not available as a destination, you would most likely substitute:	595	100.0
Other destinations in Glynn County	91	15.3
Other destinations in Georgia, outside of Glynn County	119	20.0
Destinations in other states or countries	385	64.7

Long Stay

Responents by Primary Residence: Long Stay

Area	Number	Percent
Georgia	9	4.9
Northeast	70	38.3
Maine	9	4.9
New Hampshire	1	0.5
Connecticut	2	1.1
Massachusetts	4	2.2
Vermont	4	2.2
New Jersey	6	3.3
New York	31	16.9
Pennsylvania	13	7.1
International	42	23.0
Midwest	38	20.8
Ohio	9	4.9
Illinois	3	1.6
Michigan	6	3.3
Indiana	7	3.8
Wisconsin	6	3.3
Minnesota	4	2.2
Missouri	1	0.5
Kansas	1	0.5
South Dakota	1	0.5
South Atlantic	17	9.3
Florida	2	1.1
South Carolina	1	0.5
North Carolina	4	2.2
Virginia	7	3.8
Maryland	2	1.1
Delaware	1	0.5
East South Central	3	1.6
Tennessee	2	1.1
Kentucky	1	0.5
West South Central	2	1.1
Texas	1	0.5
Arkansas	1	0.5
West	2	1.1
California	2	1.1
Total	183	100.0

Long Stay

Long Stay Visitors

	Number	Percent
Which category best describes your experience on Jekyll Island?	186	100.0
Vacation/leisure travel	182	97.8
Attending convention at the JI Convention Center	0	0.0
Other business travel	4	2.2
Year-round resident (JI primary residence)	0	0.0
Nonresident homeowner	0	0.0
Do you own a home on Jekyll Island?	186	100.0
Yes	0	0.0
No	186	100.0
Please select your annual household income range	176	100.0
Less than \$50,000	17	9.7
\$50,001 - \$100,000	85	48.3
\$100,001 - \$150,000	58	33.0
\$150,001 - \$200,000	6	3.4
\$200,001 - \$250,000	4	2.3
Over \$250,000	6	3.4
Where is your primary residence?	185	100.0
Georgia, Glynn County	1	0.5
Georgia, outside of Glynn County	8	4.3
Another state	134	72.4
Another country	42	22.7
Was Jekyll Island a primary destination for your most recent visit?	186	100.0
Yes	183	98.4
No	3	1.6
How long was your most recent visit to Jekyll Island?	186	100.0
Day trip	0	0.0
Overnight trip	186	100.0
How long was your most recent visit to Jekyll Island? (within overnight trip)	186	100.0
30 - 60 nights	65	34.9
61 - 90 nights	59	31.7
91 - 180 nights	59	31.7
181 - 365 nights	3	1.6

(continued)

Long Stay

Long Stay Visitors (Continued)

	Number	Percent
During your most recent visit to Jekyll Island, how many people were in your party?	186	100.0
1	11	5.9
2	165	88.7
3 - 4	6	3.2
5 - 7	4	2.2
8 or more	0	0.0
During your most recent visit, did you use overnight accommodations on Jekyll Island?	186	100.0
Yes	156	83.9
No	30	16.1
During your most recent visit, did you attend any special events on Jekyll Island?	186	100.0
Turtle Crawl	2	1.1
Shrimp and Grits	7	3.8
Other	133	71.5
Did not attend special events	44	23.7
If Jekyll Island were not available as a destination, you would most likely substitute:	168	100.0
Other destinations in Glynn County	10	6.0
Other destinations in Georgia, outside of Glynn County	9	5.4
Destinations in other states or countries	149	88.7

Nonresident Homeowners

Responents by Primary Residence: Nonresident Homeowners

Area	Number	Percent
Georgia	77	40.3
Northeast	37	19.4
New York	17	8.9
Vermont	6	3.1
Pennsylvania	5	2.6
New Jersey	3	1.6
Maine	2	1.0
Connecticut	2	1.0
New Hampshire	1	0.5
Rhode Island	1	0.5
South Atlantic	31	16.2
North Carolina	9	4.7
Florida	7	3.7
Virginia	5	2.6
South Carolina	4	2.1
Maryland	3	1.6
West Virginia	1	0.5
Delaware	1	0.5
District of Columbia	1	0.5
Midwest	28	14.7
Ohio	13	6.8
Michigan	4	2.1
Indiana	3	1.6
Wisconsin	3	1.6
Illinois	2	1.0
Minnesota	2	1.0
Kansas	1	0.5
East South Central	7	3.7
Tennessee	6	3.1
Kentucky	1	0.5
West	7	3.7
Colorado	4	2.1
Alaska	2	1.0
Wyoming	1	0.5
International	4	2.1
Total	191	100.0

Nonresident Homeowners

Nonresident Homeowners

	Number	Percent
Please select your annual household income range	184	100.0
Less than \$50,000	6	3.3
\$50,000 - \$100,000	38	20.7
\$100,001 - \$150,000	49	26.6
\$150,001 - \$200,000	31	16.8
\$200,001 - \$250,000	14	7.6
Over \$250,000	46	25.0
Where is your primary residence?	197	100.0
Georgia, Glynn County	14	7.1
Georgia, outside of Glynn County	66	33.5
Another state	113	57.4
Another country	4	2.0
How important are Jekyll Island's location and services to your decision to live in Glynn County?	194	100.0
Not at all important	3	1.5
Very unimportant	7	3.6
Neither important nor unimportant	23	11.9
Very important	64	33.0
Extremely important	97	50.0
How many days of the year do you usually spend on Jekyll Island?	195	100.0
14 or less	13	6.7
15 - 30	47	24.1
31 - 60	29	14.9
61 - 90	28	14.4
91 - 180	63	32.3
Over 180	15	7.7
Please estimate the percent of your annual income spent on Jekyll Island	184	100.0
1% or less	12	6.5
2 - 5	37	20.1
6 - 10	33	17.9
11 - 20	41	22.3
21 - 40	36	19.6
41 - 75	17	9.2
Over 75%	8	4.3



The University of Georgia®
