

TYBEE ISLAND TOURISM STUDY

Prepared by
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**GEORGIA
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Introduction

- Update data reported in the 2015 Tybee Island Tourism Study
- Examine various aspects of the tourism economy
- Estimate the economic and fiscal impact of Tybee Island visitors





SURVEY OF TYBEE ISLAND VISITORS

Survey: Basics

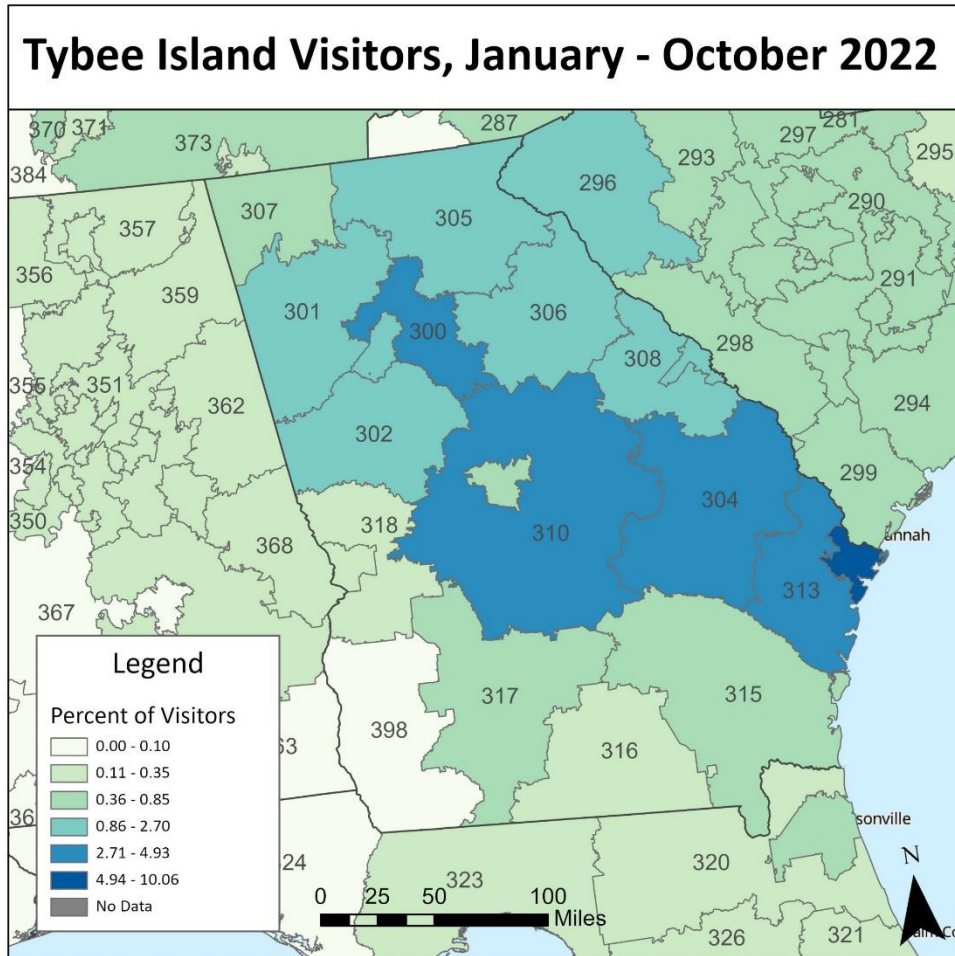
- 4,541 Total Individual Responses
 - Online Surveys: 3,202
 - In-Person Surveys: 1,338
- July 2021 – September 2022
- Visitor Survey Analysis
 - Point of Origin
 - Demographics
 - Travel Details
 - Visit Frequency & Length of Stay
 - Accommodations and Room Nights
 - Visitor Satisfaction
- Visitor Expenditures



Typical Tybee Island Visitor

- Traveled to Tybee Island by personal vehicle (84.3%)
- Traveling with other people (95.3%)
- Non-Georgia resident (61.2%)
- Aged 35 to 64 (69%)
- Married/Long-term relationship (77.2%)
- Household income of more than \$100,000 (58.4%)

Point of Origin



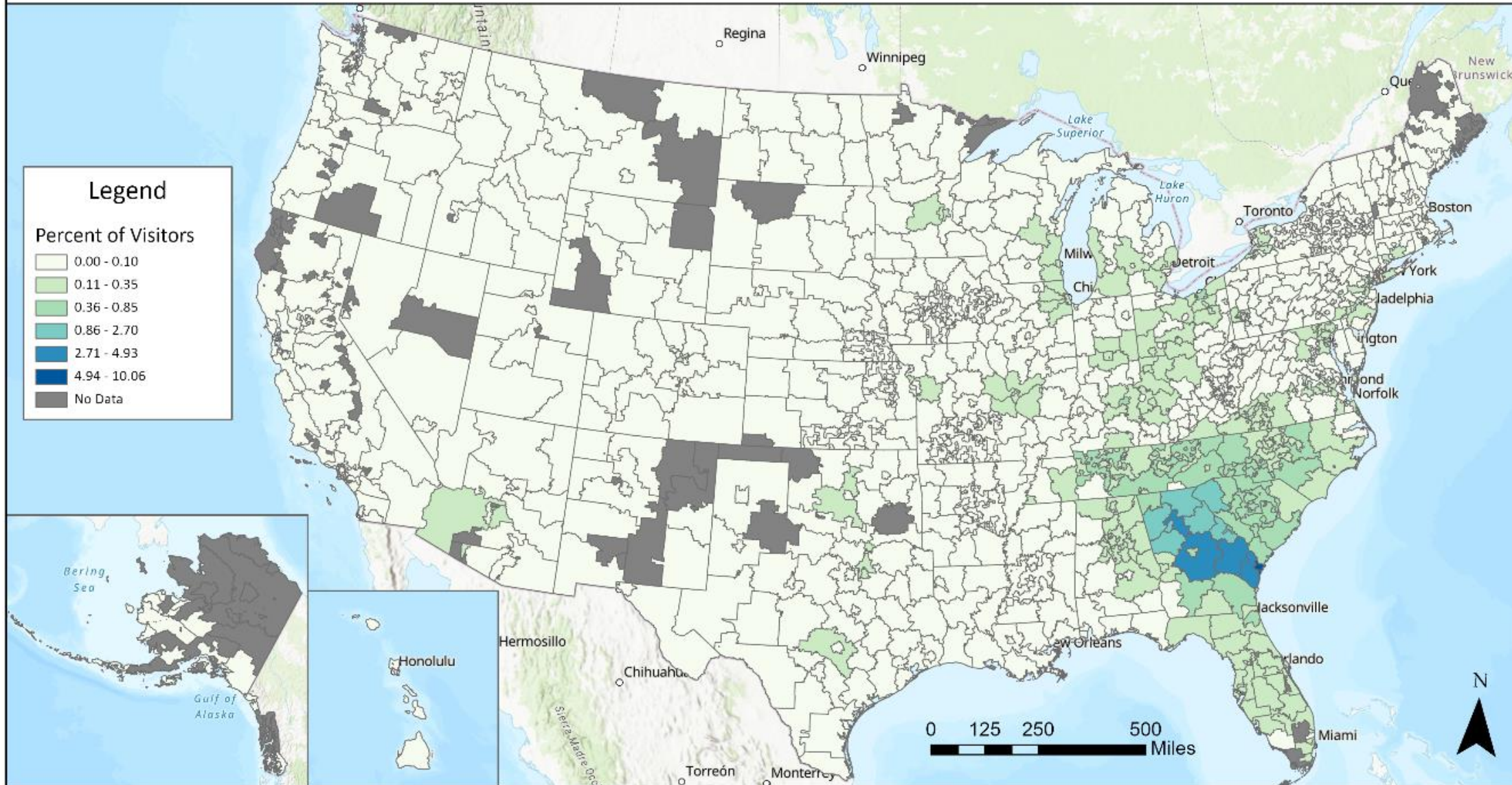
Esri, HERE, Garmin, FAO, NOAA, USGS, EPA, NPS, Esri, USGS

Visitor Point of Origin Top 10 States 2021-2022

CBAER Survey Data			Placer Data		
	State	% of Visitors		State	% of Visitors
1	Georgia	38.8	1	Georgia	41.6
2	North Carolina	7.3	2	North Carolina	6.2
3	South Carolina	7.0	3	South Carolina	5.8
4	Tennessee	6.3	4	Florida	5.1
5	Ohio	5.2	5	Tennessee	4.5
6	Kentucky	2.8	6	Ohio	3.9
7	Virginia	2.8	7	Kentucky	2.7
8	Indiana	2.8	8	Virginia	2.6
9	Florida	2.6	9	Alabama	2.3
10	New York	2.5	10	Illinois	2.2

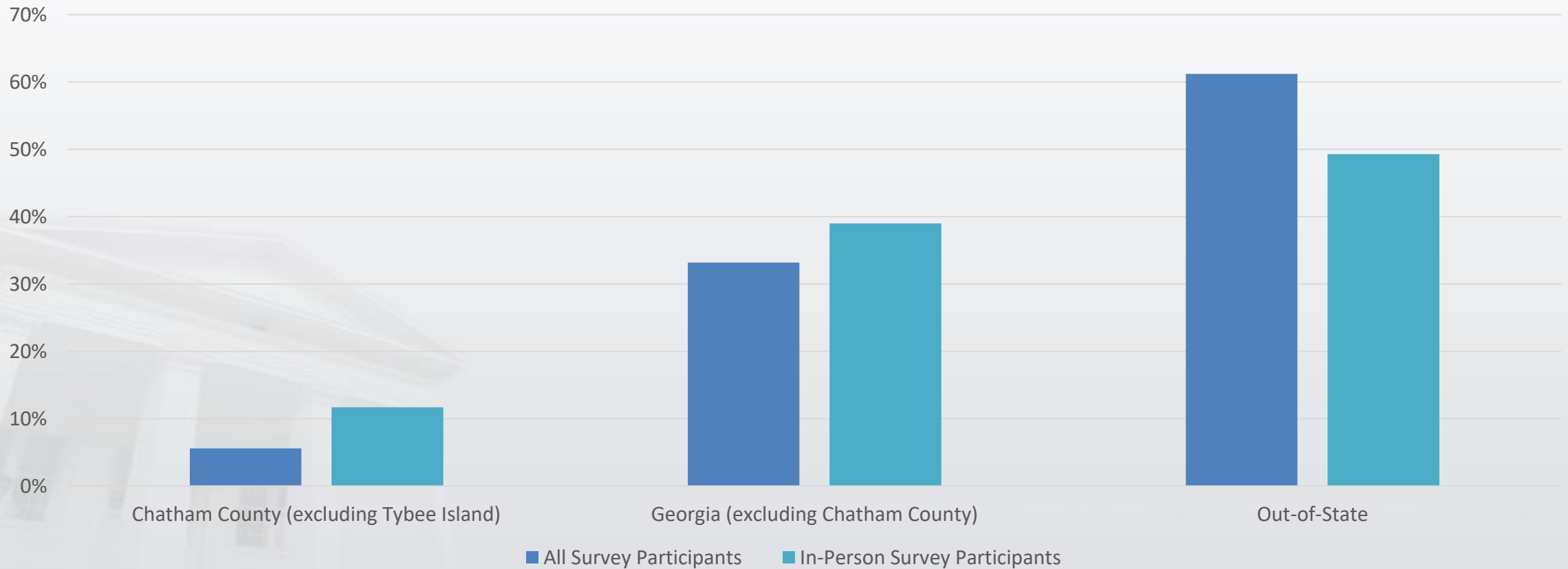
*International Visitors from CBAER data accounted for 0.4% of survey participants.

Tybee Island Visitors, January - October 2022

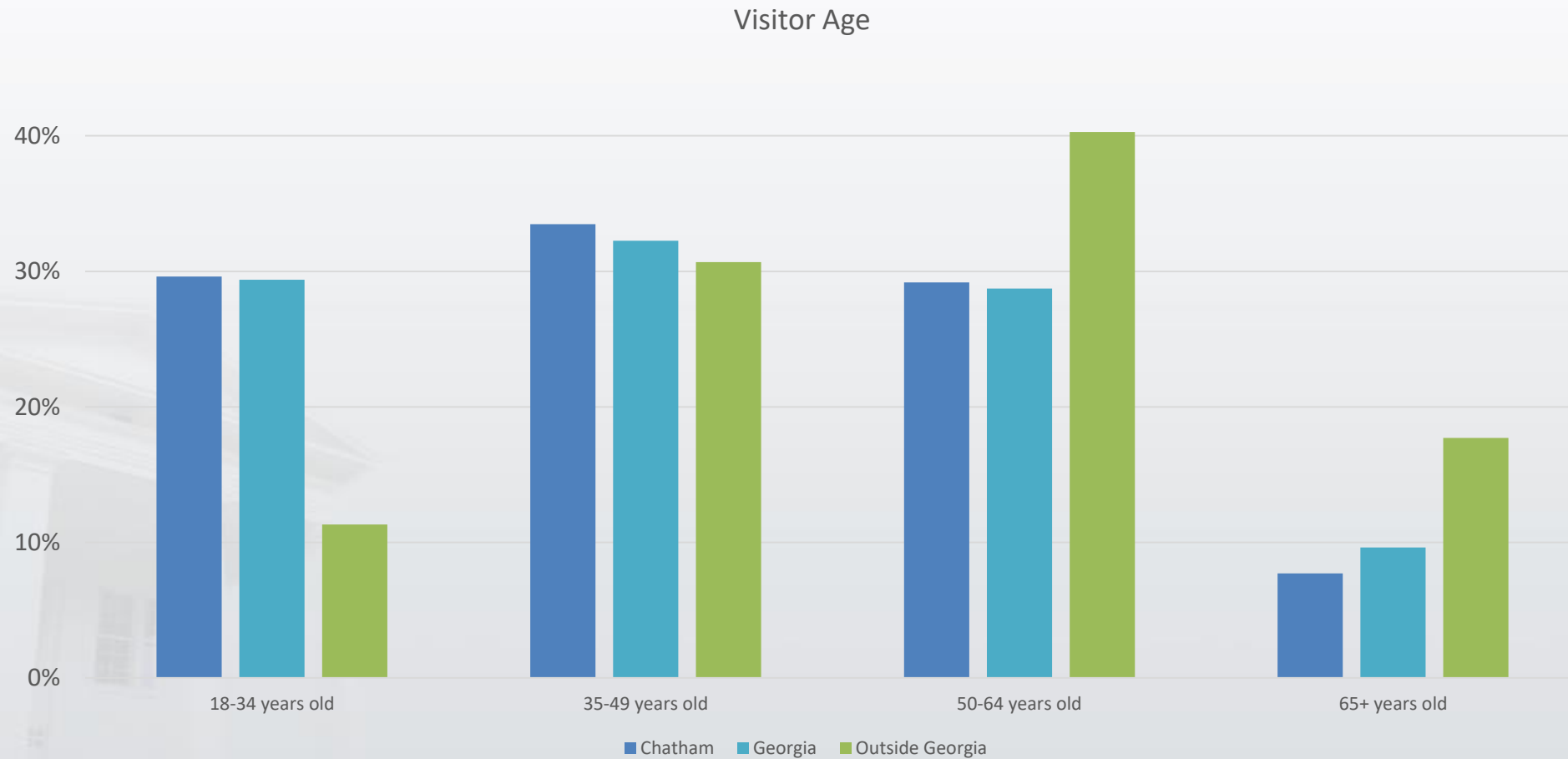


Point of Origin Groupings

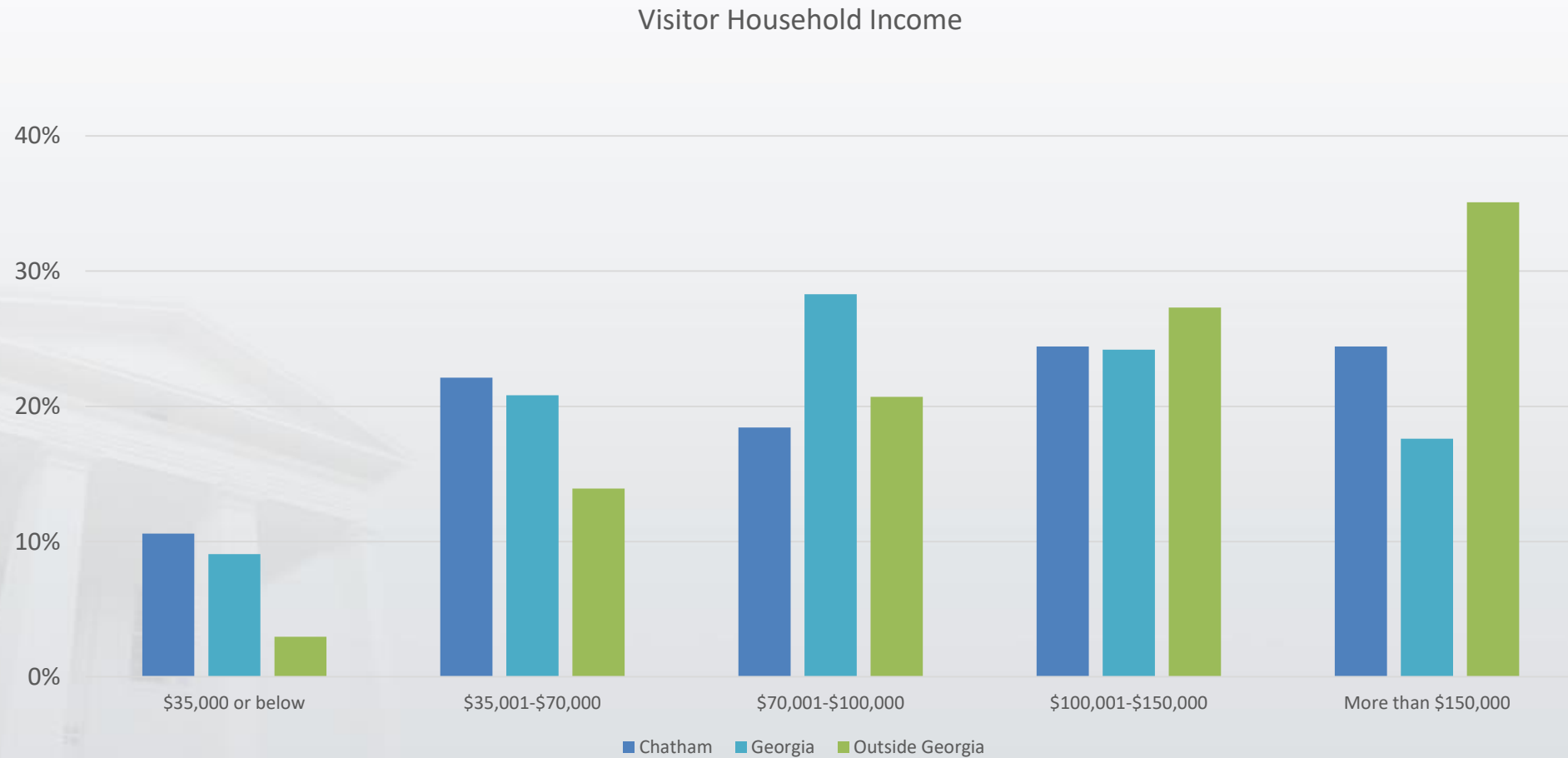
Survey Participants Geographic Breakdown



Demographics: Age



Demographics: Household Income



Demographics: Relationship Status



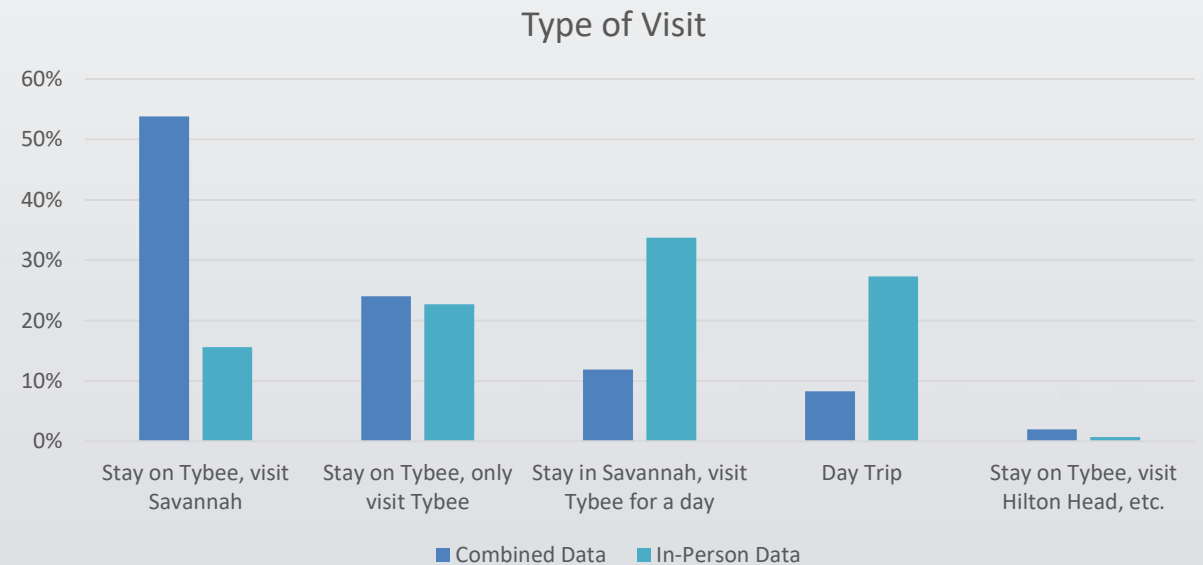
Travel Details

- Type of Travel
 - 98% of all Georgians drove a personal vehicle
 - 81% out-of-state visitors drove a person vehicle; 11% flew into the Savannah-Hilton Head International airport

- Party Details
 - Average party size: 4.3
 - Mode party size: 2
 - 73.5% traveled in a group of 2-5 people
 - 38.1% traveled with children

- Type of Visit
 - 39% Tybee overnight visitors
 - 61% day visitors

Based on in-person data



Visit Frequency and Length of Stay

- Annual Visit Frequency

- All visitors

- 3.38 annual visits: CBAER data
- 3.21 annual visits: Placer.ai data

- Tourists (outside 50-mile radius)

- 2.00 annual visits: CBAER data
- 1.03 annual visits: Placer.ai data

- Length of Stay

- Tybee Overnight Visitors

- 30.4% stayed 3-4 days; 49% stayed 5+ days
- Average number of nights: 4.5

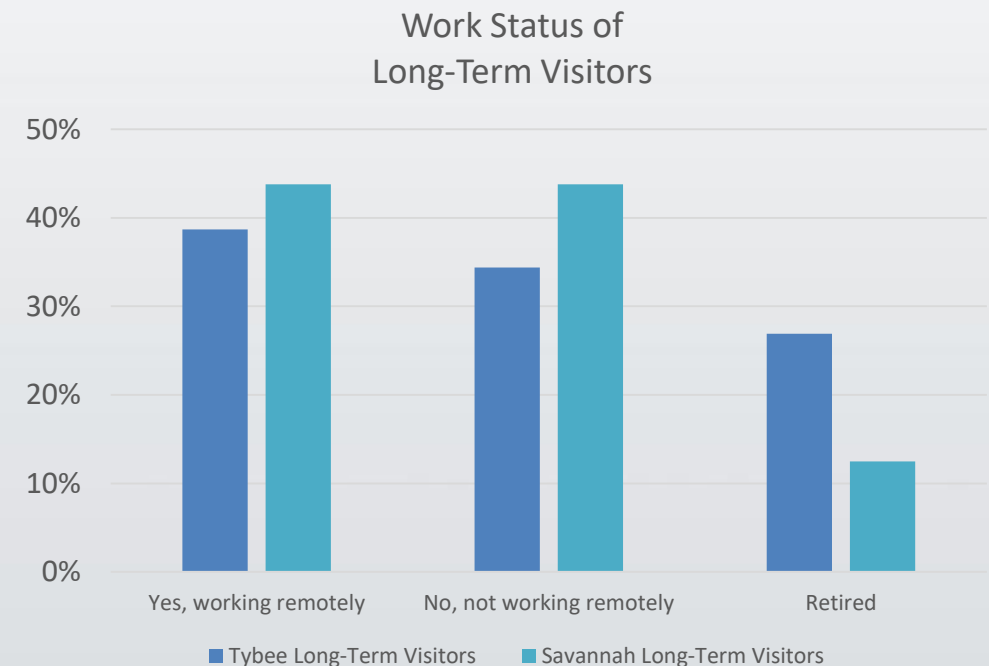
- Day Visitors

- Includes day visitors and Savannah overnights
- Most common length of stay: 3 to 5 hours

- Long-Term Visitors (stayed more than 14 nights)

- 5.1% Tybee overnights (186)

- 2.9% Savannah overnights (16)



Accommodations and Room Nights

- Tybee Island Overnigheters
 - Average room nights: 6.7
 - Total room nights: 1,188,160

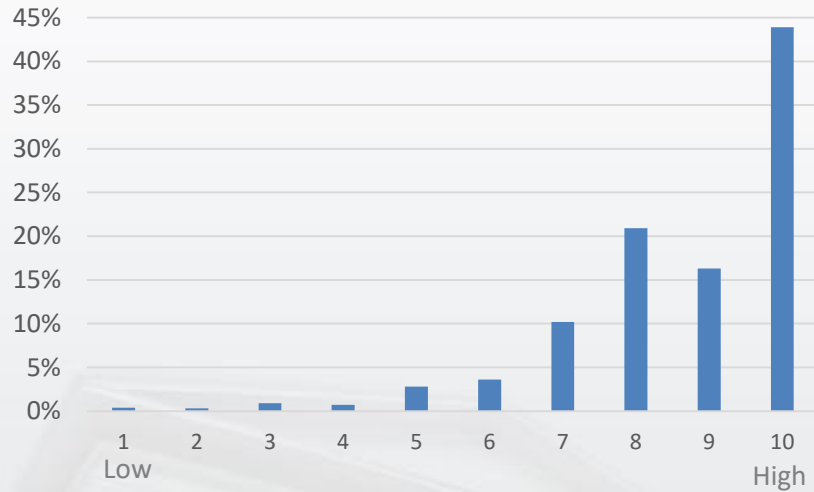
Tybee Island Overnight Visitors Type of Accommodation		
	% Total Participants	% In-Person Participants
Vacation Rental	79.5	51.0
Hotel / Motel / Resort	14.0	32.8
Private Home / Staying with Friends or Family	2.9	6.7
Historic Inn / Bed & Breakfast	2.1	3.8
Campground / RV Park	0.9	5.2
Other	0.6	0.6

- Savannah Overnigheters
 - Average room nights: 4.0
 - Total room nights: 858,131

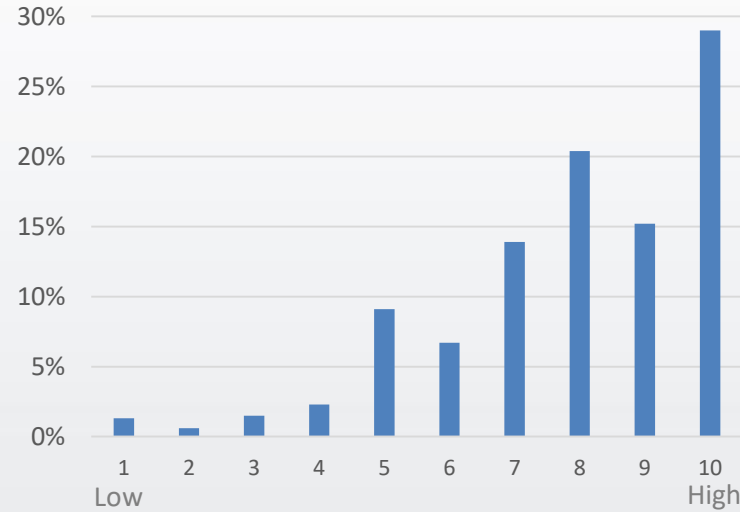
Savannah Overnight Visitors Accommodation Location	
Historic District	62.8%
Staying with Friends or Family	8.8
Suburban area	5.5
Pooler area	4.0
Near the airport area	1.9
Richmond Hill area	1.7
Garden City / Port Wentworth area	1.5
Near Interstate 95	1.3
Other	9.5
Unsure	2.9

Visitor Satisfaction

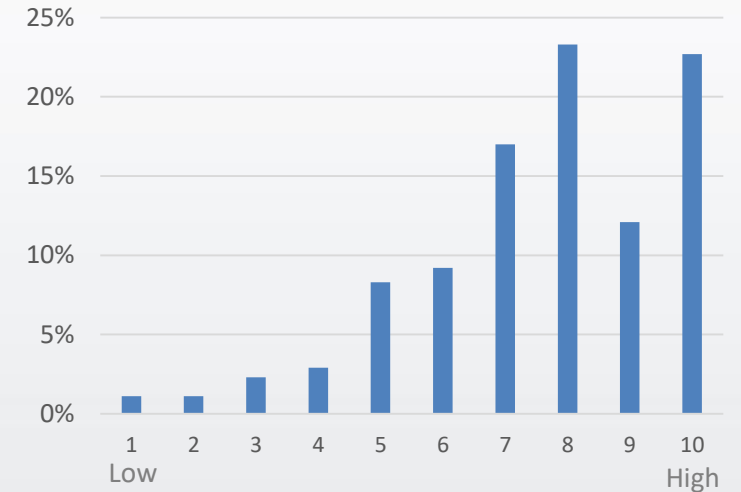
Beaches



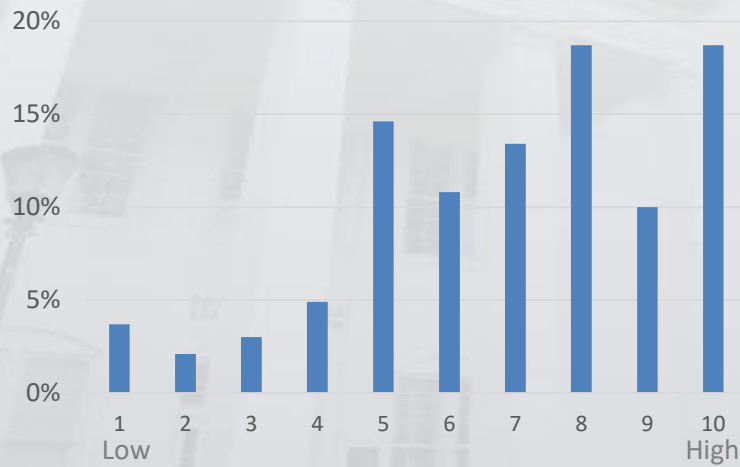
Attractions



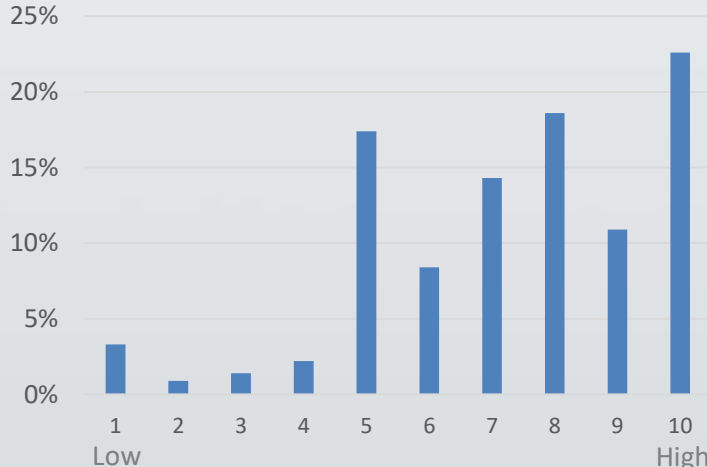
Restaurant Options



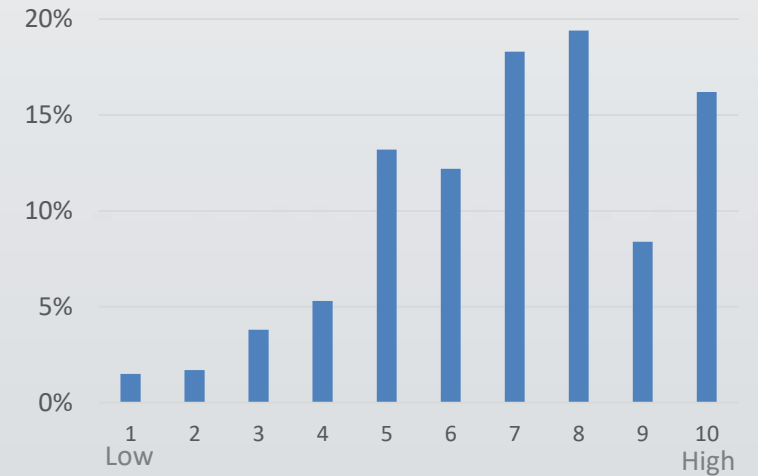
Public Restrooms



Equipment Rentals



Shopping & Retail Options



Tourist Spending on Tybee Island

IMPLAN Inputs/Parameters

- 2021-2022 year
- 1.7 million annual tourists
- 1.03 annual visits per tourist
- Type of visitor with tourist parameter
 - 44% Tybee Overnight Visitors
 - 39% Savannah Overnight Visitors
 - 17% Day Visitors

Tourist (outside 50-mile radius) Average Daily Spending Per Person on Tybee Island			
	Tybee Overnight Visitors	Savannah Overnight Visitors	Day Visitors
Restaurants	\$41.17	\$8.39	\$25.50
Groceries	\$13.95	\$1.06	\$2.89
Recreational/Rental Equipment	\$6.97	\$0.51	\$1.75
Tours/Attractions	\$5.81	\$2.09	\$1.44
Entertainment, Nightlife	\$16.55	\$3.12	\$7.11
Shopping	\$15.52	\$3.23	\$12.19
Local Transportation	\$0.77	\$0.38	\$0.41
Parking	\$2.34	\$1.04	\$5.38
Other	\$3.38	\$0.66	\$2.65
TOTAL	\$106.46	\$20.49	\$59.31

ECONOMIC IMPACT OF TOURIST SPENDING



Total Economic Impact

	Output*	Value Added*	Labor Income	Employment
Direct	\$528.42	\$317.76	\$229.66	6,172
Indirect	154.51	77.60	47.45	955
Induced	144.61	86.71	46.81	892
Total	827.54	482.06	323.92	8,018

* Dollars in millions

+ Impact reported in 2022 dollars.

On-Island (City of Tybee Island) Total Economic Impact

	Output*	Value Added*	Labor Income	Employment
Direct	\$137.39	\$82.62	\$59.71	1,464
Indirect	\$40.17	\$20.17	\$12.34	227
Induced	\$37.60	\$22.54	\$12.17	211
Total	\$215.16	\$125.34	\$84.22	1,902

* Dollars in millions

+ Impact reported in 2022 dollars.

Off-Island (Chatham County) Total Economic Impact

	Output*	Value Added*	Labor Income	Employment
Direct	\$391.03	\$235.14	\$169.95	4,752
Indirect	\$114.34	\$57.42	\$35.12	736
Induced	\$107.01	\$64.16	\$34.64	687
Total	\$612.38	\$356.72	\$239.70	6,174

* Dollars in millions

+ Impact reported in 2022 dollars.

Tax Collections Linked to Visitor Spending

	Sales Taxes	Property Taxes	Total Lodging Tax
City of Tybee Island	\$1,327,000	\$1,838,000	\$8,461,000
Chatham County	\$2,084,000	\$3,555,000	-

+ Impact reported in 2022 dollars.

Comparison of 2015 and 2023 Reports

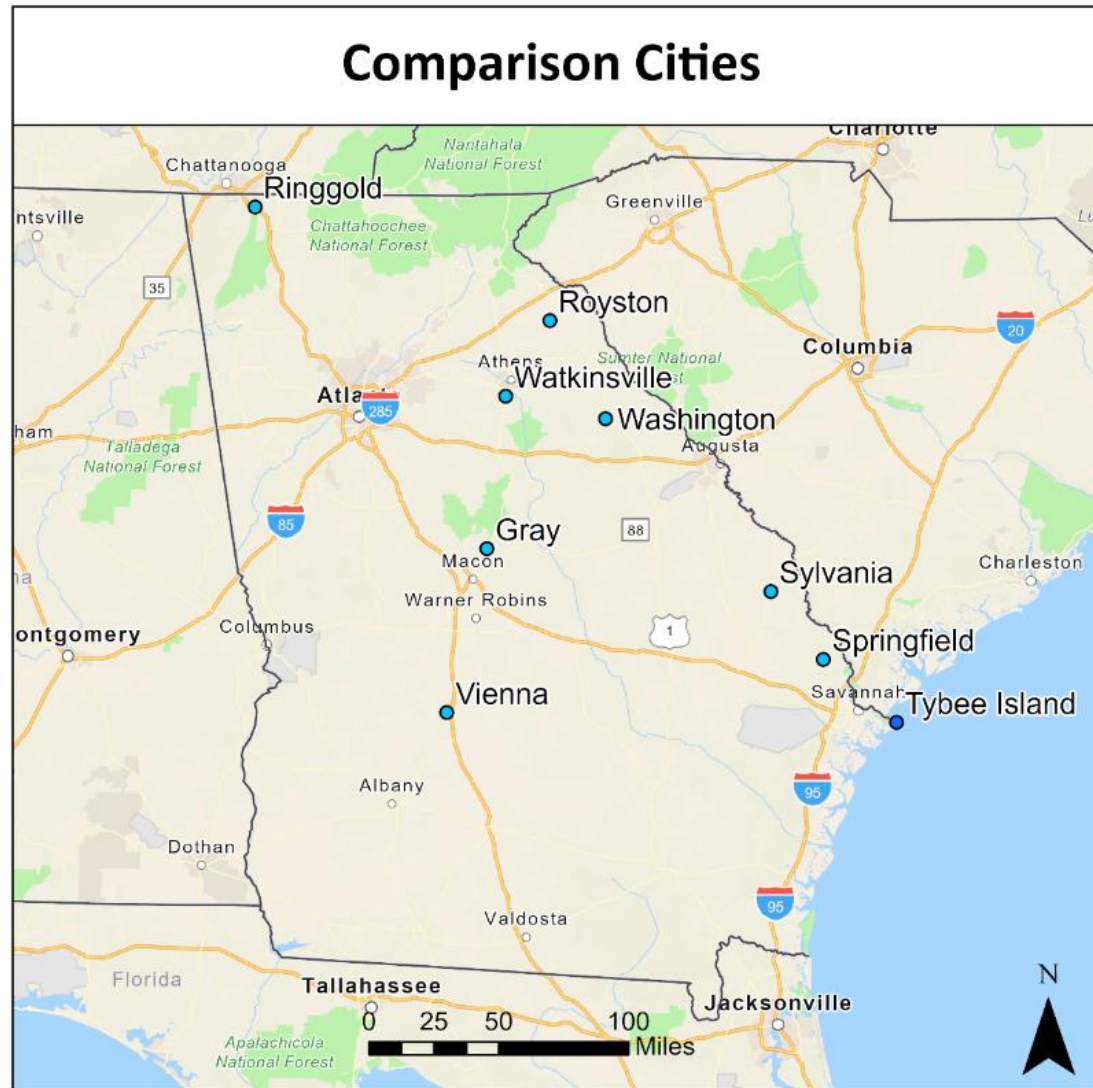
Visitation and Accommodations	2023	2015
Number of Visitors	1,763,400	1,044,100
Average Overnight Visitor Party Size	4.50	3.75
Average party size	4.30	4.30
Out-of-State Visitor Percentage	61%	27%
From Georgia (excluding Chatham County)	33%	48%
Economic Impacts	2023	2015
On-island total business revenue (Output)	\$215,159,543	\$164,898,510*
Off-island total business revenue (Output)	\$612,347,162	\$143,547,000*
On-island total employment	1,902	1,225
Off-island total employment	6,147	1,643
<i>*Inflation adjusted from 2015 to 2022 using CPI</i>		



FISCAL IMPACT ANALYSIS

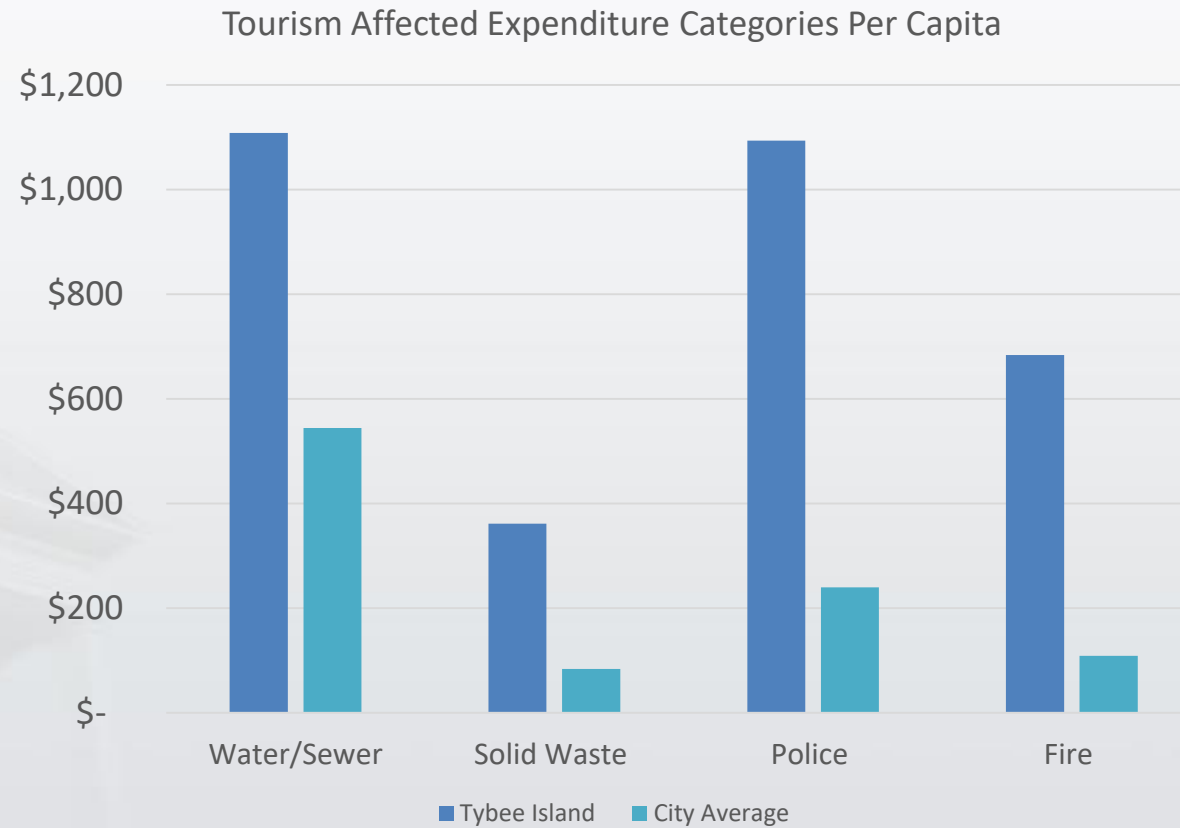
Comparison Group

Comparison Cities



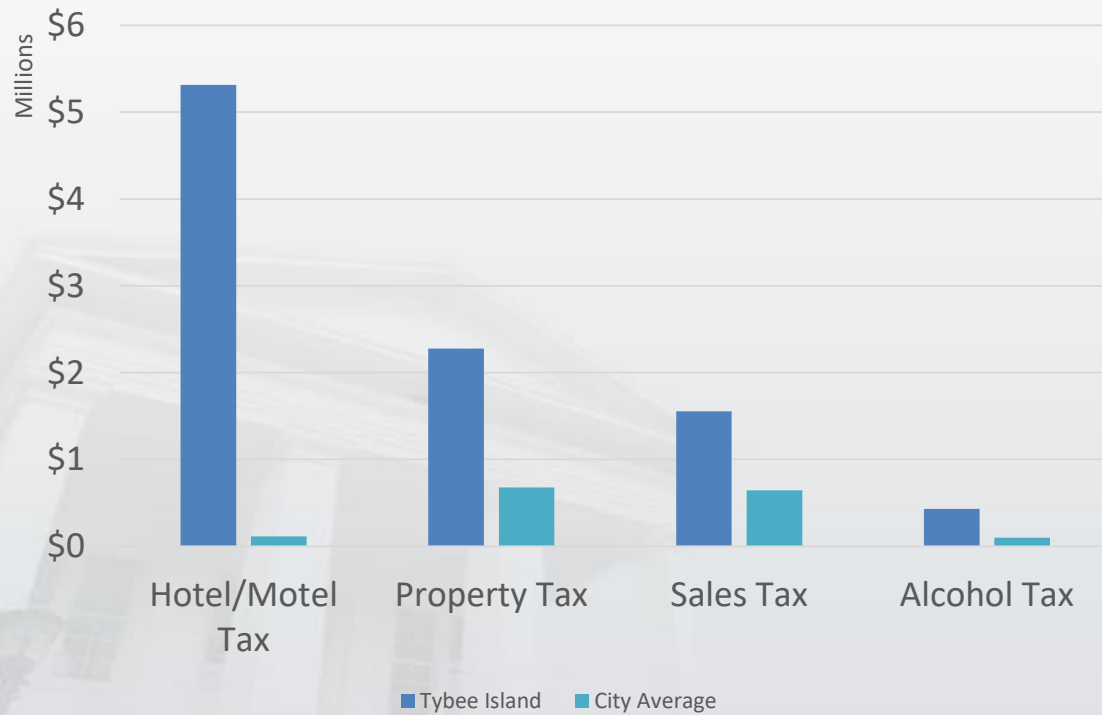
- Demographic and Economic Variables
 - Population
 - Person/Mile
 - Ethnicity Rates (% of White, Black, Hispanic)
 - Median Age of Population
 - # of Year-Round Residents
 - % Occupied Units
 - People per Household
 - % Units built since 2000
 - Median Household Income
 - Unemployment Rate

Tourism Affected Expenditures



Tourism Affected Revenue

Tourism Affected Revenue Categories



Tourism Related Revenue Categories Share of General Fund



Location Quotient Analysis

	Arts, Entertainment, and Recreation (71)	Retail Trade (44)	Real Estate and Rental Leasing (53)	Accommodation and Food Services (72)
Tybee Island	1.25	0.99	5.44	4.24
Comparison Group Average	0.15	1.24	0.26	0.97
Gray	0.26	1.45	0.36	1.02
Ringgold	0.68	1.54	0.32	1.07
Royston	0.04	1.96	0.24	1.25
Springfield	0.03	0.83	0.11	0.59
Sylvania	0.02	1.82	0.01	1.29
Vienna	0.04	0.44	0.18	0.68
Washington	0.05	1.28	0.18	1.09
Watkinsville	0.07	0.64	0.70	0.80

Source: JobsEQ by Chmura Economics & Analytics

CONCLUSION



Conclusion

- Tybee has attracted tourists from the same regions since 2015
- Significant increase in visitors between 2015 and 2023
- Tybee tourist spending supports jobs and economic activities on and off the island
- Tourism diversifies local government tax structure
- Tourism is the driver for the Tybee Island economy

THANK YOU

