
Phase 1: Market Assessment Jekyll Island Amphitheater



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Project Information

This report would not be possible without the time and contributions of the Jekyll Island Authority and the participants listed below.

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Jekyll Island Authority

Report Date: May 2023

Phase I: Market Assessment for the Jekyll Island Amphitheater

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Glossary of Key Terms

AMPHITHEATER: An outdoor performance venue. These venues can vary in size and complexity. The most basic amphitheater may only have a stage. Others might be equipped with dressing rooms, green rooms, concessions areas, ticketing booths, and more. The performance area may be level to the ground or elevated and may or may not be covered. Seating is often sloped upwards and may or may not be covered. Image 1 is an example of an amphitheater that is used for nationally touring concerts and events.

FEASIBILITY: Feasibility is assessed at multiple points in the planning process. In Phase 1, the Market Assessment asks whether a reactivated Jekyll Island Amphitheater is feasible from a *market* perspective. Phase 2, Business Planning, asks whether a reactivated Jekyll Island Amphitheater is feasible from a *financial* and *operational* perspective. This phase will only commence if Phase 1 finds that there is market viability for an amphitheater project. At the culmination of Phase 2, the Jekyll Island Authority will have the opportunity to determine whether an amphitheater is feasible for the organization at *this time* given other planning priorities.

PASSIVE USE / PASSIVE AMPHITHEATER: In this report, passive use may be used to describe an amphitheater that has no or very little permanent seating. Instead, the audience seating area might be a large lawn, either flat or slightly sloped, that can be used by passers-by for recreation when the amphitheater is not in use for performances or events. Images 2 and 3 are examples of *passive amphitheaters*.



Image 1: St. Joseph's Health Amphitheater (Syracuse, NY)



Image 2: Hinson Amphitheater (New Albany, OH)



Image 3: Posse Grounds Pavilion (Sedona, AZ)

Introduction

Jekyll Island, formerly the land of the Guale and Mocama, is recognized for its rich natural, cultural, and heritage amenities. Once a private retreat for some of the country’s wealthiest families, the island was purchased by the State of Georgia in 1947 and established as a state park. Today, it is cared for by the Jekyll Island Authority (JIA), a self-supporting state entity that is responsible for managing and stewarding the island.

Jekyll Island Authority Mission: As stewards of Jekyll Island’s past, present and future, we’re dedicated to maintaining the delicate balance between nature and humankind.

To this end, the JIA has set up parameters to protect the island’s ecosystem while ensuring it remains an inviting destination for guests. The JIA oversees the conservation, development, and management of Jekyll Island, and relies on operating revenues from leases, fees, and island amenity operations. Jekyll Island does not receive any tax revenues for its operation.

The last 15 years of the JIA’s stewardship have been focused on island revitalization. Following a period of decline in the 1990s, more than \$350 million has been invested in Jekyll Island’s infrastructure, resulting in the creation of the Jekyll Island Club National Historic Landmark District (one of the largest preservation projects in the southeast); Mosaic, Jekyll Island Museum (Mosaic); Beach Village; a new Convention Center; and the Georgia Sea Turtle Center, among other projects. Great care has also been taken in planning for the long-term conservation and preservation of the island’s natural and environmental resources. Now, as the JIA continues to look into the future, leadership would like to consider the feasibility of revitalizing the Jekyll Island Amphitheater.

The amphitheater was built in 1972. That year, a story published in the June 18 edition of *The Atlanta Journal*

and *Constitution Magazine*¹ described it as being “thrust” upon the island, the concept for it having originated out of a political agreement over State appropriations in the Georgia General Assembly. To create the amphitheater, a hole was dug in the middle of the island. The dirt was used to create a mound for tiered seating; the hole became a pond. Despite its controversial beginnings, the amphitheater served as an entertainment venue on the island for over 30 years, closing in 2005. While there has been interest in reactivating the amphitheater, the right opportunity has yet to reveal itself. In the meantime, the amphitheater has fallen into disrepair. As deterioration continues, the cost of reactivation increases.

In April 2022, the JIA retained DLR Group, a design firm with expertise in planning for and designing arts and cultural facilities, to test, from a market perspective, the opportunity to reactivate the amphitheater. This effort was to be completed within the context of the JIA’s 2018 Jekyll Island Carrying Capacity & Infrastructure Assessment, which aimed to determine the number of people, vehicles, and development the island could accommodate without compromising its natural character.

To meet this brief, DLR Group has completed a market assessment that considers:

- The forces and trends driving the cultural sector
- The leisure traveler and Glynn County resident markets for the arts on Jekyll Island
- Venue and programming competition
- User demand for space
- Alignment with long-term JIA planning goals

The resulting research will determine whether there is a market to support a renovated amphitheater. If there is, recommendations will be made related to potential venue capacity, features, amenities, and programming.

The JIA will then have the option to complete a second phase of work. That work will result in a business plan and operating

¹ Shannon, Margaret. (1972, June 18). Jekyll at the Crossroads. *The Atlanta Journal and Constitution Magazine*.

Introduction

pro-forma for the amphitheater, a site assessment and recommendations for facility / site improvements, a preliminary space program, a preliminary site plan, and a conceptual rendering for the proposed project.

With the outcomes of this work at hand, the ultimate decision as to whether the reactivation of the Jekyll Island Amphitheater is feasible for Jekyll Island will be determined by the JIA Board and their planning priorities for the future.

As such, it is imperative to keep in mind the mission of the JIA: to maintain the balance between nature and humankind. This means that even if the study finds a strong market to support a reactivated amphitheater, should it also find that reactivating the amphitheater would threaten the preservation of the island or imperil the visitor experience, reactivating it may not move forward.

Forces and Trends in Culture and Performing Arts

Catalyzed by the COVID-19 pandemic and exasperated by economic uncertainty, the arts and cultural sector is in the midst of a seismic shift. In some cases, COVID-19 served as an accelerant, quickening trends that have been in the works for years. In others, entirely new trends have emerged, requiring cultural providers and creators to rethink how they do business. The following is a selection of forces and trends that are impacting the arts and culture sector in the United States. As a general note, the term “arts and culture” is used broadly to include all forms of self-expression, from watching a ballet or symphony to printmaking, gardening, cooking, crocheting, recording music at home, and beyond.

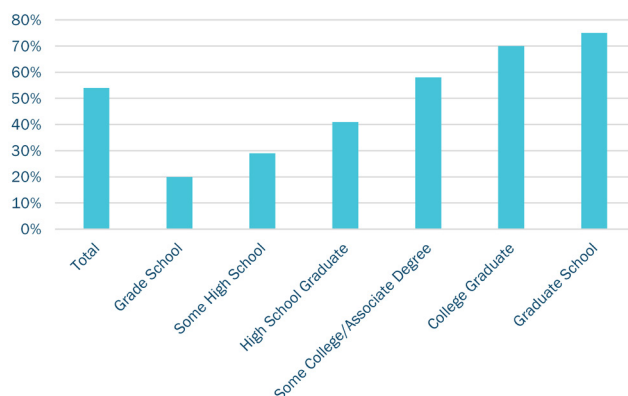
TRENDS IN AUDIENCES

The Survey of Public Participation in the Arts (SPPA) is conducted every five years by the National Endowment for the Arts in partnership with the U.S. Census Bureau. The most recent survey was conducted in 2017. Findings revealed that:

- 53.8 percent of U.S. adults attended a visual or performing arts activity at least once in the preceding 12-month period.
- In the performing arts, 43.4 percent of U.S. adults attended at least one event in the preceding 12-month period.
- Educational attainment is the number one indicator of propensity to support traditional arts and cultural programming (theater, ballet, symphonic music, opera). The percentage of adults reporting participation in the arts increases by education level. This can be seen in the bar chart to the right.
- Age and race / ethnicity also impact propensity to support the arts, though with greater variability.

The question is, has attendance and participation in the arts changed as a result of the COVID-19 pandemic? The next SPPA is expected to be released in 2023 or 2024, but some trends have started to emerge. Anecdotally, many arts and cultural organizations have reported that their audiences have been

Percentage of U.S. Adults Who Attended Any Artistic, Creative, or Cultural Activities During the Last 12 Months,



Source: U.S. Trends in Arts Attendance and Literary Reading: 2002-2017, A First Look at Results from the 2017 Survey of Public Participation in the Arts (September 2018)

slow to return while others are reporting some of their most successful seasons ever. In the commercial arena, live music events have seen a complete recovery, with companies like LiveNation reporting a 20% increase in event attendance over 2019.²

TRENDS IN VENUES

Flexible and Multi-use

Contemporary cultural venues must be flexible and nimble, responding to the needs of multiple uses and users and enabling multiple revenue streams. The pandemic emphasized this need as venues moved programming outdoors and developed socially distant seating plans while also serving as community vaccination sites and meal distribution centers.

Online Strategies and New Technologies

Although organizations like the United Kingdom’s National Theater and New York’s Metropolitan Opera have been offering

2 Scribner, Herb. (2022, September 2). Live events take off like a rocket. Axios. <https://www.colleendilen.com/2022/03/02/cultural-entities-are-not-expanding-audiences-fast-enough-to-sustain-attendance-heres-what-this-means-data/>

filmed live performance for years, it has not been a priority for most organizations. COVID changed that. In response, theaters and museums across the country were forced to develop strategies for online programming, in some cases reaching audiences well beyond their traditional geographic boundaries. Hybrid programming has emerged as a result, with many cultural entities developing online content that goes hand-in-hand with in-person offerings. This has fast tracked the incorporation of augmented reality (AR) technology into live performance. At Coachella, for example, viewers watching the event's live stream caught site of a massive parrot above the stage³ that went unseen by audience members attending in real life.

Venues as Revenue Generating Assets

Multiple revenue streams are key to long-term financial sustainability. Beyond programming, many organizations have turned their physical assets into revenue generating ones, renting lobbies, stages, galleries, green rooms, donor lounges, and beyond for events, activating spaces that otherwise would sit unused throughout the day.

THE ARTS AND CULTURE SECTOR IN THE FUTURE

So, what does this research suggest for the future of arts and cultural venues? And, specifically, for a venue on Jekyll Island?

DLR Group predicts greater commitment to environmental sustainability and resiliency.

As extreme weather events go from being rare to regular, arts and cultural organizations and facilities will be forced to consider their role in a changing climate. For some entities, the focus will be on operating practices, identifying where and how to minimize waste, save energy, and reduce overall carbon footprint. For others, emphasis will be on how to build a sustainable structure with an end goal of net zero operations. Similarly, we will see more organizations planning for environmental resilience, ensuring that they are prepared

to weather natural disasters, community crises, and other emergencies.

DLR Group predicts that audiences will continue to seek out authentic experiences that allow for a high level of control.

Audiences are looking for unique and authentic opportunities to engage with arts, culture, and community. But, they also want some control over that experience—they want the choice to come and go when they want, post to social media, text with friends, or have a snack. While not every experience can invite these behaviors into the main event, the key will be in finding ways to incorporate them into the pre- or post-show experience.

3 Coachella. [@coachella]. (2022, April 17). Instagram. https://www.instagram.com/tv/CceSgR0p0RO/?utm_source=ig_web_copy_link

The Market for a Reactivated Amphitheater

Jekyll Island is a year-round tourist destination. It is also home to a small community of full-time residents and sits in a growing regional market.

Jekyll Island's leisure traveler population will likely be the primary market segment for a reactivated amphitheater. The island's resident and regional populations will be important secondary and tertiary markets, though they are not expected to drive attendance at amphitheater events. The following provides a snapshot of each market type.

THE LEISURE TRAVELER MARKET

Jekyll Island is one of four barrier islands that comprise Georgia's Golden Isles. The area is a popular tourist destination, with visitors traveling year-round for vacations, recreation, conferences, weddings, and events. Jekyll Island itself is well-known for its beautiful beaches, the Jekyll Island National Historic Landmark District, birding, and amenities like the Georgia Sea Turtle Center and Mosaic. In 2022, traffic count data suggested that 1.39 million cars passed through Jekyll Island's entry gate, a 12.7 percent increase over traffic counts for 2019.

To be clear: in reactivating the amphitheater, increasing visitation would not be the goal. Nevertheless, given the volume of visitors, it is key to understand the leisure traveler market's propensity to support an amphitheater. The Golden Isles Convention and Visitors Bureau, Glynn County's official destination marketing organization, regularly surveys Golden Isles visitors. The findings from the 2020/2021 survey follow.

2020/21 GOLDEN ISLES VISITOR SURVEY

The 2020/21 Golden Isles Visitor Survey was completed by RRC Associates and released in February 2022. The survey was distributed to individuals interested in visiting the Golden Isles, individuals who had visited, individuals who planned to visit, and Glynn County residents. **The survey did not describe, define, or specify any response options to questions. As such, all questions and responses were open to broad interpretation.** Findings were shared in aggregate with additional reports provided specifically for Jekyll Island visitors and Glynn County residents.

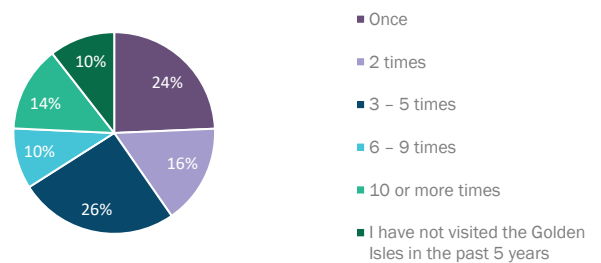
More than three quarters (77%) of survey respondents identified as female and more than three quarters (77%) were between the ages of 45 and 74. Eighty-seven percent (87%) of respondents identified as White and sixty-one percent (61%) had a gross annual income between \$50,000 and \$149,999. Thirty-two percent (32%) of respondents described themselves as a couple with no children at home and twenty-three percent (23%) identified themselves as a couple with children at home.

GOLDEN ISLES FINDINGS

- Twenty-six percent (26%) of 2020/21 survey respondents had visited the Golden Isles three to five times in the last five years; twenty-four percent (24%) had visited once.
- Prospective visitors are most interested in visiting the Golden Isles in the Spring, Summer, and Fall. For those who had previously visited the Golden Isles, travel occurred throughout the year with May, June, and July being amongst the most popular months to visit.

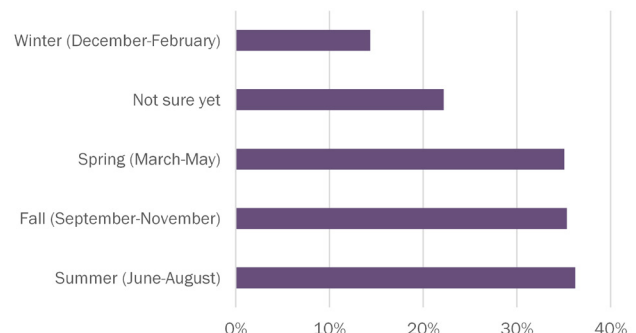
Golden Isles Visitors: How many times have you visited the Golden Isles in the past 5 years?

n=14,109



Prospective Visitors: When are you interested in visiting the Golden Isles?

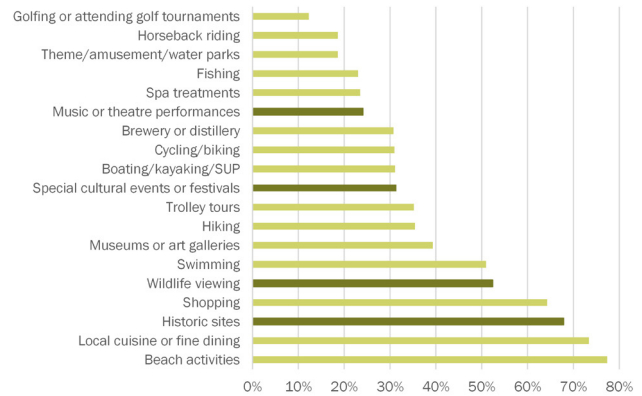
n=25,955



- Seventy-one percent (71%) of survey respondents were overnight visitors, spending at least one night in the Golden Isles.
- The average length of stay was 4.1 nights.
- Thirty-eight percent (38%) of survey respondents who had stayed in the Golden Isles stayed on Jekyll Island and forty-six percent (46%) stayed on St. Simons Island.
- Sixty-nine percent (69%) of Golden Isles visitors surveyed traveled with their spouse/partner. Twenty-nine percent (29%) traveled with their children.
- Eighty-four percent (84%) of visitors surveyed were traveling for leisure.
- Sixty-eight percent (68%) of respondents visited or planned to visit an historic site while in the Golden Isles; fifty-two percent (52%) participated in or planned to participate in wildlife viewing; thirty-one percent (31%) participated in or planned to participate in special cultural events or festivals; and twenty-four percent (24%) participated in or planned to participate in music or theatre performances.
- The survey estimates that respondents and their immediate travel parties spent an average of \$1,174 on their most recent Golden Isles trip.
- When asked how likely they would be to return to the Golden Isles in the future, seventy-nine percent (79%) of respondents indicated they would be 'extremely likely.'
- The scenery, laid-back-feel, history and heritage, and vastness of nature and trees contribute the most to survey respondents' positive impressions of the Golden Isles.
- When asked what activities or attractions survey respondents think are lacking or need to be expanded in the Golden Isles, twenty-nine percent (29%) indicated more festivals/events/live music, twenty-one percent (21%) indicated an outdoor amphitheater, and fifteen percent (15%) indicated greater nightlife offerings. Notably, thirty-nine (39%) percent indicated none of the above

Which of the following activities did you/are you planning to participate in while in the Golden Isles?

n=39,029



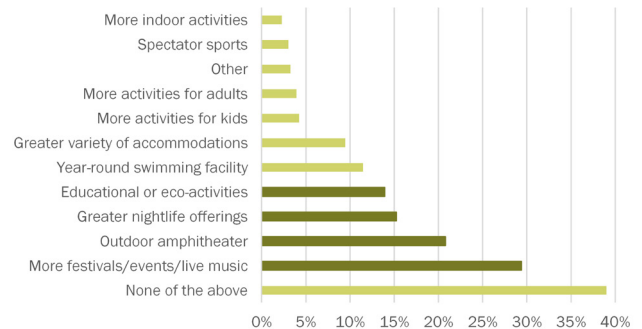
What are your positive impressions of the Golden Isles?

n=13,590



Are there activities/attractions you think are lacking or need to be expanded in the Golden Isles?

n=12,200



JEKYLL ISLAND VISITORS (2020 ONLY)

- Sixty percent (60%) of survey respondents visited Jekyll Island on their most recent trip to the Golden Isles. Jekyll Island had the largest response rate after St. Simons Island, which sixty-one percent (61%) of respondents indicated visiting.
- **Responding visitors felt that Jekyll Island was authentic, naturally beautiful, and unlike other places they had visited. They also believed the history on Jekyll Island was well-preserved and that wildlife protection / education was prominent.**

GLYNN COUNTY RESIDENTS (2020 ONLY)

- Thirty-five percent (35%) of surveyed respondents had lived in Glynn County for one to five years. An additional 30 percent had lived in Glynn County for over 20 years.
- Eighty-seven percent (87%) of survey respondents indicated that they host out-of-town visitors, with more than half hosting between five and 14 visitors in their home annually.
- Ninety-three percent (93%) of Glynn County residents surveyed indicated that they take their visitors to St. Simons Island and ninety-two percent (92%) indicated taking their visitors to Jekyll Island.
- Sixty-one percent (61%) of responding Glynn County residents had last visited Jekyll Island in 2021 and thirty-two percent (32%) had last visited in 2020.

Respondents were invited to provide additional feedback about the Golden Isles in open text format. There were multiple comments about reactivating the Jekyll Island Amphitheater to bring back plays and provide more opportunities for live music. Numerous respondents also spoke to a desire for careful, managed growth that protects the natural beauty of the Golden Isles.

EXISTING FOOT TRAFFIC ANALYSIS

To glean more about potential amphitheater attendees, DLR Group used a location intelligence and foot traffic insights tool to gather data on visitors to the Georgia Sea Turtle Center and Mosaic. The purpose of this was two-fold: First, to understand the breakdown of resident (folks living on Jekyll Island) versus leisure travelers to these sites. Then, to understand the demographic characteristics of visitors and their likelihood to support additional cultural programming. The data, which covered one year of activity, indicated the following:

- The Georgia Sea Turtle Center and Mosaic serve the leisure traveler market. Over a 12-month period, fewer than ten percent (10%) of visitors to the Georgia Sea Turtle Center and Mosaic lived within 50 miles of either facility while more than sixty percent (60%) of visitors lived more than 250 miles from either facility.
- Trade area data for the Georgia Sea Turtle Center and Mosaic suggest that the populations living within each facility's trade area spend roughly \$3 per week on entertainment spending.
- Visitation at both venues peaks between 11:00 am and 1:00 pm and is relatively consistent throughout the week, though the Sea Turtle Center does see a slight increase in activity on Saturdays.

THE GLYNN COUNTY RESIDENT MARKET

For the purposes of this study, the resident market has been defined as:

- Jekyll Island
- The amphitheater's 15-mile radius
- The amphitheater's 30-mile radius

For each segment, data⁴ have been collected from Esri, the world's leading mapping and spatial analytics software. For benchmarking purposes, data for the United States have been included where possible.

⁴ This data is accurate as of July 13, 2022.

POPULATION GROWTH

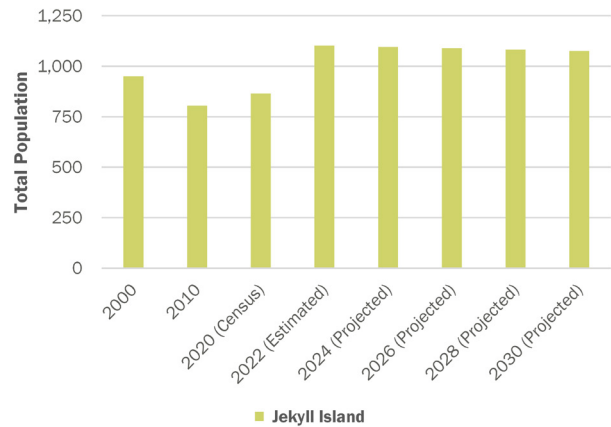
Population growth is variable. In 2022, it was estimated that Jekyll Island's population sat at 1,103. This number is notably larger than the 866 residents logged during the 2020 Census. Over the next seven years, Jekyll Island's resident population is projected to slightly contract.

In the 15- and 30-mile radii, the population has rapidly grown. Between 2000 and 2010, the 15-mile radius population grew by thirteen percent (13%). It is projected to grow an additional twelve percent (12%) between 2020 and 2030. The 30-mile radius population has been growing at an even faster rate: between 2000 and 2010, it grew by eighteen percent (18%). It is projected to grow another eighteen percent (18%) between 2020 and 2030.

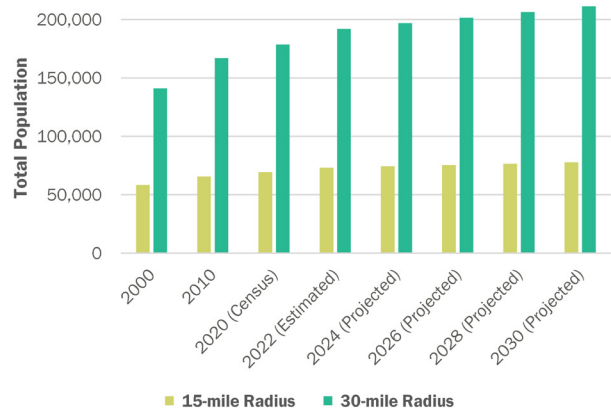
EDUCATIONAL ATTAINMENT

Educational attainment varies across market segments. On Jekyll Island, nineteen percent (19%) of the population has an Associate Degree compared to nine percent (9%) in the 15- and 30-mile radii and nationally. An additional twenty percent (20%) of the Jekyll Island population has a Bachelor's Degree and fifteen percent (15%) has a Graduate Degree. To compare, between seventeen percent (17%) and nineteen percent (19%) of the 15- and 30-mile radii populations have a Bachelor's Degree and eleven percent (11%) of both radii populations have a Graduate Degree.

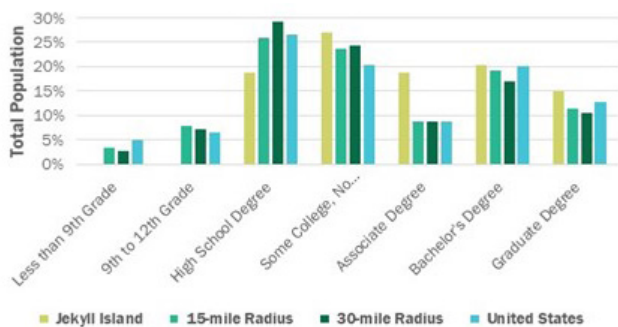
Population Trend: Jekyll Island



Population Trend: Radii



Educational Attainment



AGE

Jekyll Island skews older than either radius, and all three market segments skew older than the nation. To compare, the median age nationally is 38. On Jekyll Island, it is 59 and, in the radii, it is 43 (15-mile radius) and 42 (30-mile radius).

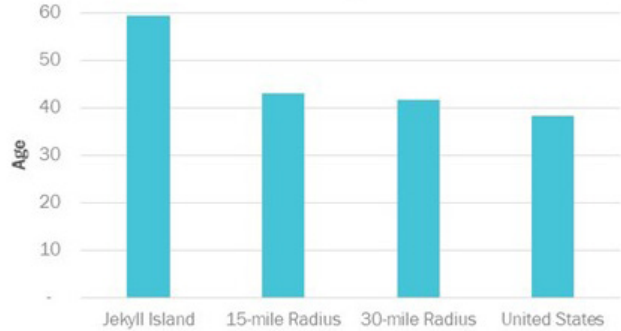
MEDIAN HOUSEHOLD INCOME

At \$68,342, Median Household Income (MHI) is highest in the 30-mile radius. MHI is lowest on Jekyll Island at \$59,820, though this number is likely impacted by the island's retiree and second home-owner populations and not reflective of true disposable incomes. The Moorings, for example, is the island's newest housing development. It features a mix of condos and townhomes, all of which have been sold or are under contract. Many of these properties went to market at close to \$750,000, suggesting a more affluent demographic.

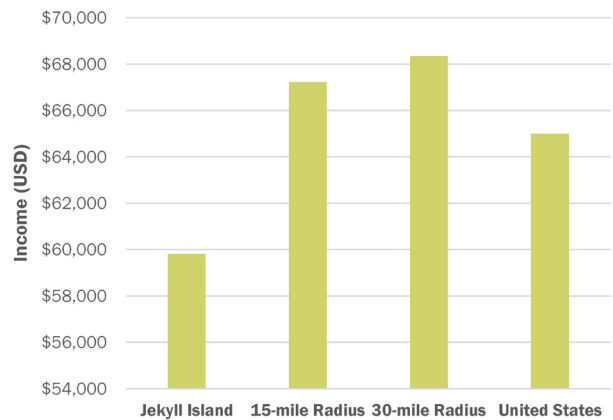
RACE AND ETHNICITY

On Jekyll Island, the population is ninety-four percent (94%) White (non-Hispanic). In the 15-mile radius, however, twenty-seven percent (27%) of the population identifies as Black (non-Hispanic) as does twenty percent (20%) of the 30-mile radius population. Additionally, six percent (6%) of each market segment identifies as Hispanic.

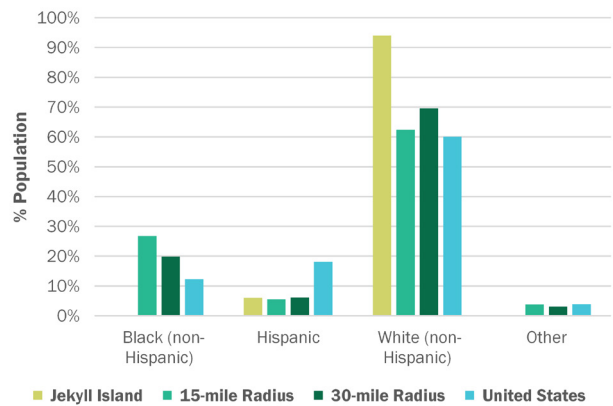
Median Age



Median Household Income

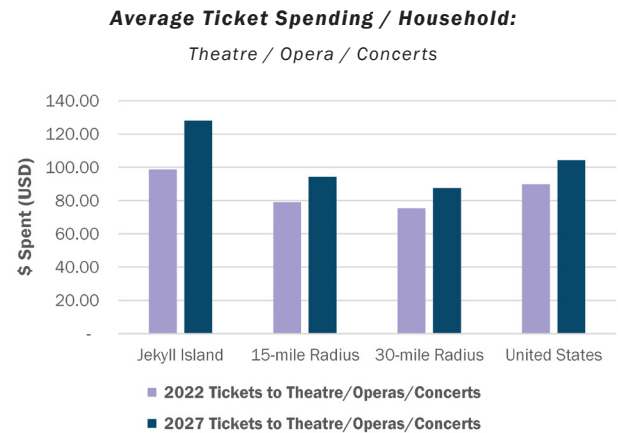


Race / Ethnicity



ENTERTAINMENT SPENDING

Esri's Consumer Spending data provides information about the estimated spending by households for goods and services in an area. The chart on the right shows average ticket spending per household on tickets to theatre / operas / concerts. Across all market segments, including in the region and across the nation as a whole, this spending is projected to increase between 2022 and 2027.



CONCLUSIONS

- The primary market for a reactivated amphitheater on Jekyll Island will be the island's leisure traveler population. This is a large population that visits Jekyll Island year-round.
- Secondary and tertiary market segments for the amphitheater will include the residents of Jekyll Island as well as those living in the island's 15- and 30-mile radii.
- Data from the Golden Isles Visitor Survey suggest that Jekyll Island visitors are both recreational and cultural tourists, attending music or theatre performances, special events/festivals, and historic sites as well as participating in wildlife viewing and going to the beach.
- Between ten percent (10%) and thirty percent (30%) of Golden Isles Visitor Survey respondents expressed interest in additional educational or eco-activities, greater nightlife offerings, an outdoor amphitheater, and more festivals / events / live music.
- Notably, forty percent (40%) Golden Isles Visitor Survey respondents did not feel that any additional activities or attractions were needed, suggesting a level of satisfaction with the current Jekyll Island / Golden Isles visitor experience.
- Foot traffic data for the Georgia Sea Turtle Center and Mosaic allow for a few assumptions on the resident and leisure traveler populations to be made:
 - Each venue's high percentage of leisure travelers suggests that visitors living farther than 50 miles of Jekyll Island travel to the island for recreation and culture.
 - Data on weekly entertainment spending suggest that the venues' leisure traveler attendees may be infrequent arts attendees in their day-to-day lives but are seeking out ways to diversify their Jekyll Island or Golden Isles experience and are willing to try something new while on vacation.
- The data also suggest a preference to be indoors during the hottest hours of the day.
- Jekyll Island's resident population has higher levels of educational attainment than the 15- and 30-mile radii populations and skews older in age. Both of these factors suggest propensity to support arts and cultural programming, specifically traditional arts activities like theatre, dance, and music (classical music, tribute bands, world/contemporary acts, and solo artists in particular).
- The populations in the 15- and 30-mile radii are growing rapidly. These populations have variable levels of educational attainment and are racially / ethnically diverse. Based on findings from the Survey of Public Participation in the arts, we can assume that this demographic may be somewhat more likely to attend festivals, events, or more commercial offerings (like nationally touring acts) than more regional acts or traditional arts programs (theatre, dance, opera, classical music).



The Competitive Situation

This analysis will assess potential competition for a reactivated amphitheater. The key question: are there gaps within Jekyll Island and the region's existing and potential cultural venue assets that the amphitheater might fill? To answer that question, DLR Group created an inventory of outdoor performance spaces based on the following criteria:

- The venue is located within 30 miles of the Jekyll Island Amphitheater
- The venue is activated at least four times a year with live performing arts events
- The venue has a seating capacity between 500 seats and 1,700 seats

For each inventoried facility, data has been collected on how the venue is programmed and activated as well as its specific features and amenities.

Information was also collected on four existing and planned indoor performing arts venues.

Rainbow Island, Sea Island (Private / Exclusive Venue)



St. Simons Island Lighthouse



Mary Ross Waterfront Park



Image Source: Golden Isles Georgia

Ritz Theatre



Image Source: Golden Isles Georgia

AMPHITHEATER INVENTORY

Aside from the Jekyll Island Amphitheater, there are three additional outdoor venues in the market: Rainbow Island, Mary Ross Waterfront Park, and St. Simons Island Lighthouse. These are informal programming sites with lawn seating. Given their flexibility, capacities for each venue have been estimated. From the assessed market inventory, Jekyll Island Amphitheater is the only venue on Jekyll Island, as can be seen in the map below, and is the only inventoried venue with permanent (as opposed to lawn) seating. Using the venue’s original capacity—1,700 seats—the Jekyll Island Amphitheater is also the largest venue on the inventory.

Jekyll Island Amphitheater Market Assessment Amphitheater Inventory

Inclusive of amphitheatres with capacities between 500 to 1,700 within 30 miles of Jekyll Island

| | Facility | Capacity |
|--------------|-------------------------------|----------|
| Amphitheater | Jekyll Island Amphitheater* | 1,700 |
| Lawn | Rainbow Island* | 1,000 |
| Lawn | Mary Ross Waterfront Park* | 500 |
| Lawn | St. Simons Island Lighthouse* | 500 |

•Inputs based on historical size and use
*Some estimations made

Jekyll Island Amphitheater Market Assessment: Market Segments



Competitive Situation

AMPHITHEATERS BY PROGRAMMING TYPE

Performing arts venues are activated through three activity types: **presenting, producing,** and/or **rentals**. These activities can be understood as follows:

- A **presented** event is one that has been produced by a third party. A venue operator then pays for the event to be performed in their facility, assuming responsibility for ticket sales, marketing, technical services, and so on.
- A **produced** event is one that has been developed from the ground up by a creative team (directors, actors, designers, etc.) assembled by the venue / venue operator.
- A **rental** event is one that has been produced by a third party. That third party then pays a venue / venue operator to use its facilities for the performance or event. In this scenario, the renter is usually responsible for ticket sales, marketing, and most technical services, although this can vary from one venue to the next.

None of these activity types are exclusive of the other. In fact, most performing arts facilities fill their calendars with a combination of two or three activity types (presenting and renting, presenting and producing, and so on).

Historically, the Jekyll Island Amphitheater was activated through a variety of partnerships. This included an early partnership (from 1976 to 1983) with Jekyll Island Music Theatre, Inc., a local theater company that produced an annual season of musicals, as well as multiple partnerships with university theater departments. The JIA's partnership with Valdosta State University was the longest, lasting from 1989 to 2004, when it was terminated by the JIA for budgetary reasons. The amphitheater remained open for one more year, during which it was programmed with movies and some concerts. This past activity is indicated on the inventory below.

Jekyll Island Amphitheater Market Assessment: Amphitheater Inventory

Inclusive of amphitheaters with capacities between 500 to 1,700 within 30 miles of Jekyll Island

| Facility | Capacity | Activities | | | | | | | | | | | | | | | | | | | | | |
|--|----------|---------------------|---------------|---------------------|--------|----------------|------------------|-------------|-------------|------------------------------|------------------------------|--------------|----------|--------|--------|------|---|-------------------------|-----------------|------------------------|-------------------------|----------------------|----------------|
| | | Presented | | | | | | | | | | | Produced | Rental | | | | | | | | | |
| | | Broadway/Commercial | Other Theater | International Tours | Family | Music: Popular | Music: Classical | Music: Jazz | Music: Folk | Music: Cover / Tribute Bands | Music: World / International | Music: Other | Dance | Opera | Comedy | Film | Live Streaming (National Theatre Live, Met Opera, etc.) | Lectures/Guest Speakers | Performing Arts | Cultural Organizations | Community Organizations | Presenters/Promoters | Private Events |
| Amphitheater Jekyll Island Amphitheater♦ | 1,700 | | | | | | | | | | | | | | | | | | | | | | |
| Lawn Rainbow Island* | 1,000 | | | | | | | | | | | | | | | | | | | | | | |
| Lawn Mary Ross Waterfront Park* | 500 | | | | | | | | | | | | | | | | | | | | | | |
| Lawn St. Simons Island Lighthouse* | 500 | | | | | | | | | | | | | | | | | | | | | | |

♦Inputs based on historical size and use
*Some estimations made

The remaining venues on the inventory are primarily activated through presented live music and some family programs. Each space is also available for rent by outside users (cultural organizations, community organizations, presenters / promoters, and / or private events).

AMPHITHEATERS BY FEATURES AND AMENITIES

As stated, the inventoried amphitheaters are largely informal. None of the inventoried venues offer covered seating, and the Jekyll Island Amphitheater, constructed with bleacher seating, is the only venue with permanent seating options. The remaining venues make use of lawn seating, inviting eventgoers to bring blankets and chairs. Further, the inventoried venues have very few amenities. Most rent lighting

and sound equipment for events, and none offer concessions or alcohol sales.

Assumptions about availability are based on venue programming calendars. 'Medium' availability suggests that an outside user would have little trouble renting the venue on a prime night of the week (Thursday / Friday / Saturday), while 'low' availability suggests a venue is highly active with very few days available for rent. The inventory suggests that, on Jekyll Island, potential renters would struggle to find an available outdoor venue for a larger capacity event, while off island there would be greater accessibility.

Jekyll Island Amphitheater Market Assessment: Amphitheater Inventory

Inclusive of amphitheaters with capacities between 500 to 1,700 within 30 miles of Jekyll Island

Jekyll Island Amphitheater Market Assessment Amphitheater Inventory

Inclusive of amphitheaters with capacities between 500 to 1,700 within 30 miles of Jekyll Island

| | | | Features & Amenities | | | | | | | | | | | | | | | |
|--------------|-------------------------------|-------|-----------------------------|---------------------------------|--------------|---------------|------------------------------|----------------|--------------------|----------------------|-----------------|---------|--------------|-----------------|-----|--------|------|---------------|
| | | | Features | | | | | Ammenities | | | | | Availability | | | | | |
| | | | Covered Seating (Permanent) | Covered Seating (Non-permanent) | Lawn Seating | Fixed Seating | Theater Support / Wing Space | Dressing Rooms | Lighting Equipment | Projection Equipment | Sound Equipment | Parking | Food Service | Alcohol Service | Low | Medium | High | Not Available |
| Amphitheater | Jekyll Island Amphitheater♦ | 1,700 | | | | | | | | | | | | | | | | |
| Lawn | Rainbow Island* | 1,000 | | | | | | | | | | | | | | | | |
| Lawn | Mary Ross Waterfront Park* | 500 | | | | | | | | | | | | | | | | |
| Lawn | St. Simons Island Lighthouse* | 500 | | | | | | | | | | | | | | | | |

*Inputs based on historical size and use

*Some estimations made

ADDITIONAL EXISTING OR POTENTIAL VENUES IN THE MARKET

The Amphitheater Inventory captures data on the market's outdoor performing arts spaces. There are, however, a few additional spaces (two existing and two planned) that must be considered:

Ritz Theatre | Brunswick, GA The Ritz Theatre is a 440-seat historic theater that was built in 1899. The building is owned by the City of Brunswick and operated by the nonprofit Golden Isles Arts and Humanities Association. The venue is programmed year-round with produced and presented live events, film, visual art exhibitions, and educational programming.

Soglo Gallery Brunswick Actors' Theatre | Brunswick, GA Soglo Gallery Brunswick Actors' Theatre is a production company that showcases local and regional artists, writers, and actors. The organization operates a 2,600 square-foot gallery and 111-seat theater venue. They also coordinate a series of outdoor arts festivals and curate rotating exhibits for Southeast Georgia Health System.

Community Center for the Arts | College of Coastal Georgia | Brunswick, GA The Community Center for the Arts represents a partnership between Glynn County Schools and the College of Coastal Georgia to develop a 1,000-seat arts center on the College of Coastal Georgia's Brunswick campus. The venue is planned to be programmed with music and dance performances, lectures, meetings, and events. The project has not yet broken ground.

Amphitheater at Mary Ross Waterfront Park | Brunswick, GA The City of Brunswick's 2015 master plan for Mary Ross Waterfront Park proposes a Central Waterfront Green with a covered events stage and 60,000 square feet of open space. It is envisioned to be used for park programs, passive and active recreational uses, seasonal events, and concerts, accommodating nearly 5,000 audience members.

CONCLUSIONS

- Aside from the Jekyll Island Amphitheater, there are three other outdoor venues in the market.
 - These venues are best described as informal, community venues, lacking features and amenities like dressing rooms and back of house facilities; lighting, projection, and sound equipment; and food or alcohol service.
 - The programming at these venues is largely comprised of locally and regionally touring acts.
- While larger, nationally touring acts do stop in the market, it is typically for major festivals and events.
- In addition to the venues on the Amphitheater Inventory, there are four additional venues to consider: The Ritz Theatre, Soglo Gallery Brunswick Actors' Theatre, the Community Center for the Arts, and a proposed amphitheater and event lawn at Mary Ross Waterfront Park.
 - Given distinctions in target markets—the primary market for an amphitheater on Jekyll Island would be leisure travelers, while the primary markets for the Ritz, Brunswick Actors' Theatre, Community Center for the Arts, or Amphitheater at Mary Ross Waterfront Park would primarily be Golden Isles residents—these venues may represent an opportunity for block booking acts.
 - In block booking, promoters / producers share the costs associated with bringing an act to the market thereby enabling them to book bigger and better-known acts than they might otherwise be able to afford.

User Demand and Potential Partners

Using information gathered throughout the planning process, this section of the report will assess user demand for the amphitheater. It will also begin to identify potential partnership opportunities.

POTENTIAL USES AND USERS

Use of the amphitheater can be divided into three activity types: live performance, education, and events. These are complementary activity types that could activate an amphitheater at various times throughout the day and various days throughout the week.

Live Performance:

Historically, the Jekyll Island Amphitheater was activated through a third-party that was responsible for programming the venue. The JIA's current operating model would support this case with a reactivated amphitheater. While the specifics of this arrangement would be determined through business planning in the phase two scope of work should it be determined that the market can support a venue, the ideal partner would be a regional or national presenter with experience operating venues in tourism driven markets. Local entertainment presenters currently operating on Jekyll Island might occasionally present acts, but this would not be the primary driver of amphitheater programming.

Education:

As a state park, education is a key component of Jekyll Island's programs, especially Conservation. Conversations with Jekyll Island Conservation staff, as well as representatives from Georgia Audubon, suggest that the amphitheater site, with its forested surroundings and adjacent pond, could serve as a delivery site for educational programming.

Events:

With a 128,000-square-foot Convention Center, the historic Jekyll Island Club Resort, and multiple hotels, Jekyll Island has a robust infrastructure for hosting meetings and events and is a popular destination for doing so. Multiple stakeholders believe that the amphitheater could play two roles in augmenting the Jekyll Island meetings and events business: 1.) by providing entertainment offerings to meeting and event attendees; 2.) by serving as an intimate and unique events

venue. JIA Marketing, for example, could envision using the amphitheater for VIP and bespoke events, such as an evening of stargazing and wine tasting, that elevate the Jekyll Island experience.

Partnership Opportunities:

The JIA has a successful track record of developing private sector partnerships to market, activate, and operate Jekyll Island's amenities. The same should be true for a reactivated amphitheater. Partnership opportunities exist with the following:

- The JIA contracts with ASM Global to manage and operate the Jekyll Island Convention Center. An opportunity to expand this partnership to include the Jekyll Island Amphitheater in a way that serves the JIA, ASM Global, and the Convention Center should be explored.
- Hotels on the island could partner with the amphitheater on marketing events and offerings for group packages.

In addition to the above, the JIA regularly partners with the Golden Isles Convention and Visitors Bureau to market Jekyll Island and its amenities. This partnership would expand to include marketing for the amphitheater.

How an amphitheater might be operated—and the additional partners that might be brought to the table—will be further evaluated in Phase 2 - Business Planning should this research determine there is a market for the venue on the island.

CONCLUSIONS

- Three activity types could activate a renovated Jekyll Island Amphitheater: live performance, education, and events. These are complementary activity types that could activate the amphitheater both throughout the day and the week.
- There are partnership opportunities for activating an amphitheater with educational programming and events. Live event programming would need to occur through a partnership with a third-party operator.
- It may be possible for the venue operator to partner with a number of Jekyll Island and Golden Isles entities to market an amphitheater and its programs.

Benefits and Impacts

As the managing entity responsible for stewarding Jekyll Island and maintaining the balance between nature and humankind, the JIA takes investment in infrastructure seriously. To that end, it is imperative that reactivating the amphitheater align with broader island goals and initiatives. To ensure that is the case, past planning documents have been assessed, including:

- Jekyll Island Carrying Capacity & Infrastructure Assessment (October 2018)
- Jekyll Island Master Plan Update (2021)
- Jekyll Island Conservation Plan 2020
- Jekyll Island Golf Improvement Plan 2022
- Jekyll Island Authority Strategic Plan FY 2023-FY 2025

A summary of findings from these documents is included below. In addition to the goals and objectives stated in each plan, JIA leadership have laid out specific goals for the amphitheater:

- It must be operated by a third-party operator.
- It must be operated sustainably and without the financial support of the JIA.
- It must align with the Carrying Capacity & Infrastructure Assessment.

JEKYLL ISLAND CARRYING CAPACITY & INFRASTRUCTURE ASSESSMENT

This study, completed in October 2018, serves as the foundation for JIA decision making. Its primary objective was to identify a practical carrying capacity for Jekyll Island that would identify the number of people, vehicles, and development that the island could accommodate without negatively impacting its unique cultural and natural resources and character.

The study projected that Jekyll Island would reach visitation capacity between 2020 (4.01 million) and 2021 (4.57 million). A number of recommendations were provided as a result, touching on everything from sustainable infrastructure and operating procedures to economics. While the study recommends implementing a permit or reservation system to limit the number of people entering the island, as well as charging event and festival fees, it also suggests that the JIA support ecological venues and destinations on the island and recommends an additional “ecotourism” venue or activity that

would highlight Jekyll’s environmental systems and resources. In particular, it is recommended that revenue generating enterprises be explored, particularly those with a small footprint and large economic gain. It is also suggested that the JIA explore partnerships to revamp underutilized venues.

THE JEKYLL ISLAND MASTER PLAN UPDATE

The Jekyll Island Master Plan Update identifies conservation, preservation, and education as the JIA’s key values in establishing objectives related to conservation and development, land use, economic sustainability, and more. Historic and Cultural Resources are an important piece of the plan, which includes recommendations for programming, the amphitheater, historic site monitoring, and Historic District preservation and maintenance. Programming recommendations include increased opportunities for kids and adults; more interaction with preservationists, scholars, authors, and local legends; cocktail evenings and summer camps; holiday programs; and more. Related to the amphitheater, the plan acknowledges the potential impact of bringing live theater and other events back to Jekyll Island, but stresses that a private partner would be critical to long-term viability.

JEKYLL ISLAND CONSERVATION PLAN 2020

This plan outlines conservation values for Jekyll Island’s Conservation Program and establishes a mission to “conserve, manage, and restore Jekyll Island State Park’s natural communities and biological diversity; provide nature-based educational and recreational opportunities for the general public; and guide the Jekyll Island Authority, its partners, and its tenants to reduce the broader environmental footprint of human activities that occur within the park.”⁵ While the plan covers a number of issues, an entire section is dedicated to nature-based education and outdoor recreation, both of which are viewed as being intrinsically linked to the Conservation Program mission.

In outlining a strategy for nature-based education and outdoor recreation, the plan recommends that Jekyll Island take a diversified approach, partnering with the private sector to offer a variety of opportunities. Specific strategies include increasing

5 Jekyll Island Authority. (2020). Jekyll Island conservation plan 2020. Jekyll Island Authority. https://issuu.com/jekyllisland/docs/conservation_plan_jan__1_/2

and enhancing outdoor and nature-based learning spaces and facilities as well as pursuing green infrastructure, nature-based engineering, and sustainable practices.

Related to outdoor recreation, the Conservation Plan highlights two strategic opportunities: increase access to the interior of the island and plan for generational changes in outdoor recreation.

JEKYLL ISLAND GOLF IMPROVEMENT PLAN 2022

The Golf Improvement Plan assessed the conditions and operations of Jekyll Island's three 18-hole golf courses and the 9-hole Great Dunes course. The plan determined that 63 total holes is not in line with trends in market demand for golf. Rather, the plan suggests 54 total holes and provides recommendations on how to repurpose portions of Jekyll Island's golf courses. Included is a recommendation to set aside 50 acres of land for publicly accessible natural landscapes and ecological restoration areas.

The proposed wildlife corridor has the potential to enhance the biological diversity of both plants and animal species. It will also provide connectivity for the island's natural areas, which are currently separated by areas under golf management. Additionally, this unique enhancement will help meet the public demand and appreciation for nature-based programming and novel outdoor experiences on Jekyll Island. This wildlife corridor would extend to and abut the amphitheater site.

JEKYLL ISLAND AUTHORITY STRATEGIC PLAN FY 2023-FY2025

The FY 2023-FY 2025 Strategic Plan identifies elevating the visitor experience, reducing participant numbers during events, and providing more immersive encounters with a stronger focus on conservation, preservation, and education as goals. These are contrasted with several challenges. Key among them are capacity management, preservation of cultural and historical assets, conservation of resources, hurricanes and tropical storms, ADA compliance, increasing competition, and escalating operating costs.

THE BENEFITS AND IMPACTS OF A REACTIVATED AMPHITHEATER

Reactivating the amphitheater would impact Jekyll Island in ways positive and negative. Given the JIA's mission and commitment to the Carrying Capacity & Infrastructure Assessment, it is essential to give both careful consideration.

BENEFITS

1. The amphitheater has the potential to align with many of the objectives described in the Carrying Capacity & Infrastructure Assessment, The Jekyll Island Master Plan Update, and the Jekyll Island Conservation Plan 2020. This would be particularly true, from a design perspective, should the JIA prioritize net-zero operations, sustainability, and flexibility as design objectives.
2. The venue could provide leisure tourists with more exposure to preservationists, scholars, authors, and local legends (as recommended in the Master Plan Update) through programs like lectures, interactive education sessions, and speaker series.
3. The amphitheater's location—inland rather than on the coast—aligns with goals to more broadly disperse leisure travelers across the island.
4. The amphitheater would provide an additional and complementary offering to Jekyll Island's other cultural amenities (Mosaic, the Georgia Sea Turtle Center, and the Historic District).
5. While the amphitheater could (and should) be programmed during the day, entertainment options are most likely to occur in the evening, providing leisure visitors with late-day activity options.

IMPACTS

1. A reactivated amphitheater has the potential to draw increased visitors and vehicles to Jekyll Island causing undue strain on the JIA and the island's natural resources. Additionally, there is very limited parking at the amphitheater site. In response, the JIA would need to consider strategies to limit the regional market's attendance at events (e.g. giving leisure visitors early access to ticket sales) or control vehicular traffic (e.g. a shuttle system to transport visitors from the mainland onto the island).

2. An active amphitheater could be disruptive to wildlife protection. Particularly, a food and beverage component could result in a human-wildlife conflict.
3. If designed without bird health and safety in mind, a reactivated amphitheater could have negative impacts on the birding population that currently makes use of the amphitheater site.
4. The residential areas surrounding the amphitheater site could suffer from noise pollution. Compliance with the JIA's noise ordinance would be required.
5. Amphitheater operations could be impacted by the island's climate and environment. Specifically, heat, insects, and late afternoon rain storms (and bad weather more generally).
6. Any number of factors could impact the long-term viability of a reactivated amphitheater on Jekyll Island (another pandemic, poor management by the third-party operator, a major natural disaster, etc.) leaving the JIA in a situation similar to its current one.

CONCLUSIONS

- The JIA's number one priority is balancing visitor volume, and associated traffic and parking constraints, with the preservation and conservation of the island's natural and cultural resources.
- For the amphitheater to be reactivated, the right third-party operator would need to be identified and put in place.
- Reactivating the amphitheater could have significant impact on the island—both positive and negative. These impacts should inform the JIA's ultimate decision making around the future of the amphitheater site.

Conclusions and Recommendations

To determine the viability of reactivating the Jekyll Island amphitheater, this analysis has considered market propensity to support arts and culture, competitive venues and programs, user demand for space, partnership opportunities, and the benefits and impacts of the amphitheater's reactivation on Jekyll Island. Based on this analysis, DLR Group has arrived at the following conclusions and recommendations.

CONCLUSIONS

The Market:

A year-round tourist destination, the primary market for a reactivated amphitheater on Jekyll Island will be the leisure traveler market. Data suggests that this market is comprised of recreational and cultural tourists. These are visitors that are primarily traveling to the Golden Isles to visit the beach but are also looking for activities to build around the beach-going experience. While survey data suggests an interest in more activities and attractions in the Golden Isles, including an outdoor amphitheater, there is also interest in keeping the Jekyll Island and Golden Isles experience exactly as is. In many ways, this sentiment aligns with the Jekyll Island Carrying Capacity & Infrastructure Assessment and speaks to a broader goal of enhancing the Jekyll Island experience without putting its natural beauty and resources at risk.

From a programming perspective, visitor data suggests opportunities for mid-day activities, either educational or cultural, at the amphitheater site in addition to concerts and events that would take place in the evening.

The Competitive Situation:

Its current state of disrepair notwithstanding, the Jekyll Island Amphitheater, with its permanent seating and stage, is the only true amphitheater in the market. With an original capacity of 1,700, it is also the largest. The region's remaining outdoor venues are informal lawn spaces used for community concerts and some other events. This suggests very little local competition for an amphitheater, particularly a venue with back- and front-of-house amenities and features.

In addition to amphitheatres, there are two existing theaters operating in the market and two venues that have been proposed. These venues will likely draw from the resident

market, whereas a reactivated Jekyll Island Amphitheater would be drawing from on-island leisure travelers. In this regard, there may be block booking opportunities with one or more of these venues, which could enable a reactivated Jekyll Island Amphitheater to share the cost of bringing acts to market.

User Demand and Potential Partners:

A reactivated Jekyll Island Amphitheater could come to life through three activity types: live performance, education, and events. These are complimentary activities that could activate the amphitheater throughout the day and the week. Related to live performance, a third-party operator would need to be retained to program the venue. Ideally, this would be a regional or national venue operator experienced in programming and managing venues in ecologically-oriented tourist destinations. The specifics of this arrangement would be further explored in phase two business planning.

Educational programs and birdwatching activities could bring activity to the amphitheater throughout the day, using the site as an outdoor or nature-based classroom, a point on Ranger Walks, or as a break point for lunch.

With the Convention Center and multiple hotels, Jekyll Island is an established destination for conferences, weddings, and other events. As such, it is likely that the events business could drive the amphitheater's activity, particularly VIP and bespoke events that would be enhanced by a more secluded and intimate venue.

Benefits and Impacts:

The JIA's main objective is to maintain the balance between nature and humankind on Jekyll Island. With that in mind, it is unlikely that a reactivated amphitheater would operate like a large, commercial amphitheater that attracts thousands of people every weekend. Rather, if the project were to move forward, amphitheater programming, operations, and design would need to be carefully planned in order to ensure the lowest possible impact to the island.

At the same time, multiple past planning documents recommend that the JIA invest in low-impact and "ecotourism" venues, including outdoor and nature-based classrooms.

There is also a desire to distribute human activity more widely across the island, including its 800 acres of maritime forest. In its present location, nestled amongst the trees and adjacent to a pond, the amphitheater could serve as a gateway to the maritime forest, particularly with the addition of interpretive trails.

RECOMMENDATIONS

Based on the above, DLR Group believes that the leisure visitor market could support a venue on Jekyll Island. That said, there are a few caveats:

Given objectives to preserve, conserve, and sustain Jekyll Island, a large-scale amphitheater (something like the St. Augustine Amphitheatre in St. Augustine, Florida for example) is not recommended at this time. Sustaining such a venue would require booking nationally touring commercial acts and attracting large audiences, neither of which align with broader JIA priorities. Seasonal theater productions, similar to those that formerly activated the amphitheater, would not generate enough revenue to sustain a venue year-round.

A small amphitheater structure with minimal visitor and performer support spaces and lawn seating could work on the site (something like the Hinson Amphitheater in New Albany, OH, which is pictured in the Glossary). However, the visitor experience and general operations would be susceptible to the heat, the bugs, and any inclement weather. The venue operator would need to be prepared to address all issues, and long-term sustainability could be impacted should visiting artists and event planners grow frustrated with the unpredictability of the venue environment. It is possible that such a venue could be better suited elsewhere on the island, where frequent breezes could cool the air and help minimize the impact of bugs. The appropriate site would need to be determined through a site selection and assessment process.

With that in mind, the JIA has a few options for the amphitheater site.

Option A: Locate an indoor / outdoor venue on the amphitheater site for use as a performance, event, and education space. This venue could be designed to have net-zero operations and have bird-friendliness and sustainability

in mind. It would be able to accommodate any number of uses, from private events, to education sessions, to yoga classes, to live music, speakers, films, and more. While the venue might look like a standard four-wall building, one wall would have the ability to open to an outdoor lawn. This would allow the venue to accommodate entirely indoor events, entirely outdoor events, or events that would make use of both the interior and exterior spaces.

Indoors, the venue might accommodate seated events of 100 to 150. When opened to the outdoors, however, the venue capacity may increase to 800 with seating spread across lawn and terraced seating. This capacity would comfortably position the venue for attracting regional and mid-tier touring acts.

Venue features would need to include an artist green room that might also double as a catering preparation area, storage, and acoustic treatment. Theatrical equipment, like lighting, sound, projection, and A/V, could be owned by the venue or rented on a per-event basis. Most venues own at least some equipment, which is then rented at an additional cost to external parties using the venue. The decision of whether to purchase or rent this equipment will be further explored in business planning and ultimately decided through the design process.

Patron amenities should include:

- Permanent or portable concession areas, including at least one VIP bar or concession area
- Restrooms
- A permanent or portable ticketing / information kiosk or guest services booth
- Hearing assist devices and other accommodations to enhance the ADA experience

Neighborhood noise would need to be a consideration in this concept. Sound mitigation could be further explored and addressed in site and business planning.

Programming at the venue could include a mix of live music and performing arts, more cultural offerings (like speakers and films), educational offerings, and private events. The balance of these programs would be further explored in business planning. While a venue operator would ultimately be in charge of programming the venue with entertainment, a potential

activity profile might include the following:

- *Presented Series A:* Touring bands and musicians, comedians, and other solo performers. Presented music could include jazz, bluegrass / folk, singer / songwriters, and tribute bands.
- *Presented Series B:* A Golden Isles / Jekyll Island-focused series featuring regional bands and performers, storytellers, experts / speakers, historians, and others. This series should be focused on the authenticity of the Golden Isles / Jekyll Island experience and building meaningful, lasting relationships between patrons, the amphitheater, and the island.
- Provide additional one-off and unique amphitheater experiences.

Other performing arts, like solo or small-ensemble dance and theater performances, could also be built into the calendar, though these would likely happen at a lower frequency.

Option B: Consider alternatives to a reactivated amphitheater. The JIA may decide that the risks of reactivating the venue are greater than the potential benefits. With that in mind, the JIA could opt to allow the amphitheater to continue in its current state of decline. In this scenario, the JIA might disperse with any elements that compromise the site's safety or choose to go a step beyond that, demolishing the former stage and removing some or all of the bleachers such that the area could be filled in by natural growth and serve as an extension of the Wildlife Corridor proposed in the Golf Improvement Plan.

Should the JIA advance this option, a small-scale venue or nature pavilion could be incorporated into the proposed corridor at the current amphitheater site to serve as a historical marker and designated location for ecotourism and educational programming.

NEXT STEPS

The JIA should determine whether Option A or Option B is most in line with its current planning priorities. Should the JIA select Option A, DLR Group recommends that the organization move forward with phase two of the study process, which would include:

- A business plan and operating pro-forma for the venue
- A site assessment and recommendations for improvements
- A preliminary space program
- A preliminary site plan
- A conceptual rendering for the proposed project

Should the JIA select Option B, additional thought should be given to how best relinquish the amphitheater site to nature. If the site is incorporated into the proposed wildlife corridor, an intentional ecotourism opportunity should be considered.

Peer Project

The following page features an example of an indoor / outdoor venue. It is important to keep in mind that no two venues are ever exactly alike—they vary in how they look, how they are owned, how they operate, and how they are sustained and programmed. The project is therefore intended to serve as an approximation of an indoor / outdoor venue on Jekyll Island. Information has been collected (where possible) on venue ownership and operations, features and amenities, programming, and capital costs.

THE WILD BEAST AT CalArts **SANTA CLARITA, CA**

Ownership and Operations

CalArts, a private art university, owns and operates the venue.

Features and Amenities

The Wild Beast opened in 2010. It is a 3,200-square-foot indoor / outdoor music pavilion that can seat 100 when closed. One side of the structure opens to a flat lawn that has a bank of tiered seating off to one side. This area can accommodate more than 750 patrons. The venue can easily adapt, acoustically and physically, to any number of event configurations. Back-of-house and audience support amenities are located underneath and at the rear of the structure, taking advantage of the site's natural elevations.

Programming

The venue is used by CalArts and can be configured for a number of uses, including use as a classroom space and a rehearsal space. Performances are open to the public.

Construction Costs

\$4 million, raised through private donations.

Rental Costs

The venue is not available for rent.

Staffing

Staffing is provided by CalArts.

Considerations for a Jekyll Island Amphitheater

- The venue is highly flexible, allowing it to accommodate a mix of activities in a number of seating configurations.
- Events can take place indoors, outdoors, or in a combination of environments.
- The venue could be activated at any time of day and in any type of weather.
- The small venue footprint, combined with its creative use of the site, makes it minimally invasive to the surrounding landscape.



Image Source: SALT Landscape Architects



Image Source: SALT Landscape Architects



Image Source: Laguna Beach Independent



Image Source: Tom Bonner / ArchDaily