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Charrette Conference Development Potentials for Florida Discovery in Jacksonville, Florida

Harrison Price Company

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December 10, 1985
Charrette Conference
DEVELOPMENT POTENTIALS FOR FLORIDA DISCOVERY IN JACKSONVILLE, FLORIDA
October 21-22, 1985

Prepared by:
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Section 1

INTRODUCTION

Harrison Price Company was retained in October 1985 to organize and carry out a charrette conference directed at defining an optimum concept and tentative economic potential for the Florida Discovery project, an undertaking conceived with the purpose of stopping the extensive visitor pass through traffic in and around Jacksonville, Florida in an active commercial recreation attraction.

Quoting from the proposal which launched this project; "Jacksonville has long been a victim of the pass-through phenomenon in the heavy tourism of Florida. It has an entry or gateway location but people visiting the state hurry by enroute to the many highly developed tourist destinations of the state. Mr. Jim White and his friends have been talking about a project called Florida Discovery which would provide an orientation to the State and various support services in an entertainment attraction appropriate to an entry location on the tourist circuit. The project would be strategically located within the city of Jacksonville close to the Interstate Highway. Precise content of the project is still to be finalized but discussions to date have suggested the following elements:

1. A giant map/model of the state showing all the attractions available to tourists in Florida. It is visualized as a 1/2-acre presentation which would be electronically articulated to respond to visitor requests for information.

2. An orientation center which would make available reservations and ticketing information for attractions and accommodations throughout the state."
3. Specific services like food and beverage, gas and oil, a specialized bookstore and souvenir merchandise catering to tourist interests.

4. Some kind of museum/exhibitory dealing with the history and lore of the state, its explorations and treasures.

5. Other attraction elements yet to be conceived.

Some of the initial planning parameters discussed are a project cost of $20 million to $30 million; visitor space of 300,000 square feet and a 10-acre site. Specific sizing, phasing and content elements are yet to be developed. It is hoped that the project can do a major job of stopping the visitor flow, generating attendance above one million."

The purpose of the charrette was to assemble a group of experienced recreation and attraction experts familiar with the Florida market, who would in an intensive two-day uninterrupted conference;

- evaluate the essential economic performance and operating parameters of the proposed concept avoiding any built in errors of execution;

- determine the adjustments and refinements of concept which will result in a feasible balance of attraction power, capacity and stay time, attendance and revenue generation and cost of development;

- create a program for the venture appropriate for ensuing steps of detailed feasibility analysis, schematic development, financing and subsequent implementation.

Participants listed in Table 1 were selected for the range and quality of their experience and their background in the
Florida attractions business. James Wright, President of Space Needle Corporation, has an extensive background in attraction management at Six Flags (including a park in Orlando) and the Space Needle. Grady Larkins is a successful Florida based independent attraction designer with extensive experience in the amusement park field—particularly at Busch Gardens. Alan Eskew was responsible for the excellent site development plan at New Orleans for Louisiana World Exposition and heads up an extensive architectural practice with a heavy focus on recreation projects. Harry Wilbur is a principal in a very large and successful design and development practice at Design and Productions, Inc. concentrating on expositions, exhibits, visitor centers and related attractions. Nick Winslow (who was Florida based for several years) and Harrison Price between them have an extensive background in economic planning and feasibility analysis for a wide range of attractions. As head of Paramount's Future General, Winslow has specific background in filmic and other high technology approaches to the attractions industry.

The group assembled at the Sheraton at St. John's Place for the two days, October 21st and 22nd of 1985. Operating in the original story board conference style, an agenda was prepared as a rough road map for the meeting. It is outlined as follows:

1. Introduction and orientation
   • Participants
   • Role of this charrette in the planning process

2. Project background
   • Development objectives
   • Review of site characteristics (size, location, accessibility, surrounding land uses)
   • Possible constraints on operations (weather conditions/seasonality, site terrain, local availability of supporting infrastructure—hotels/motels, campgrounds, food service)

3. Preliminary indications of market support
   • Resident market size and characteristics
   • Tourist market
   • Competitive environment (other attractions in area and attendance experience)
   • Visitor accommodations in the area
Table 1
LIST OF PARTICIPANTS

Janis Coover
James L. White III
Carol Caldwell and Thomas Mobley,
Convention Center General Manager
FLORIDA DISCOVERY AND THE CITY OF JACKSONVILLE

Harry L. Wilbur, Jr.
DESIGN AND PRODUCTION, INC.

Grady Larkins
GRADY LARKINS ASSOCIATES

R. Alan Eskew
ESKEW, VOGT, SALVATO AND PILSON

James E. Wright, President
SPACE NEEDLE CORPORATION

Harrison A. Price
Nicholas S. Winslow
HARRISON PRICE COMPANY
4. Experience of other attractions in the area
   • Market penetration and attendance
   • Operating season
   • Admission prices

5. Basic development parameters
   • General scope of project vis-a-vis indicated market support
   • Recommended operating season
   • Visitor length of stay objective

6. Specific content
   • Thematic orientation
   • Entertainment/recreation activities
   • Food/beverage service facilities
   • Merchandise sales facilities
   • Administrative and support facilities
   • Probable phasing of development

7. Preliminary estimates for proposed attraction
   • Market penetration and attendance
   • Design day attendance
   • Physical capacity requirements
   • Overall acreage requirements (first phase plus future expansion)

8. Summary and adjournment
   • Recap of charrette findings
   • Projected schedule of completion of summary paper
   • Assignment of individual responsibilities and follow up input from participants
   • Adjournment

The first day focussed on the market setting and the concept originally proposed for the project. The second day the group attempted to come to grips with appropriate redirection of the concept and a plan of action for implementation of the project.

The write-up that follows attempts to highlight and summarize the concensus of the participants in the charrette. Although opinions were diverse, the group was essentially unanimous on most key elements—particularly in reference to the final concept, the positiveness of the opportunity and the general outline of theme and content.
Section 2

THE PROJECT ENVIRONMENT

Considerable time was spent the first day on evaluating given factors in the environment—site availability, competitive attractions and the market place.

Site Requirements and Availability

The size of the site required for the project was estimated as follows:

<table>
<thead>
<tr>
<th>Site Required Per Million Attendance</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Peak month (at 15%)</td>
<td>150,000</td>
</tr>
<tr>
<td>Peak week (divide by 4.43)</td>
<td>33,860</td>
</tr>
<tr>
<td>Peak day (at 20%)</td>
<td>6,772</td>
</tr>
<tr>
<td>Average on site peak for mixed use (30%)</td>
<td>2,032</td>
</tr>
<tr>
<td>Acreage required (at 500/acre)</td>
<td>4.1</td>
</tr>
<tr>
<td>Visitor parking (2,032 divided by 3.2)</td>
<td>635</td>
</tr>
<tr>
<td>Employee parking</td>
<td>150</td>
</tr>
<tr>
<td>Total</td>
<td>785</td>
</tr>
</tbody>
</table>

Acreage for parking                7.9
Total acreage per million          12.0
Expansion (50 to 100%)             6-12 acres
Total site required per million attendance 18-24 acres

Four specific site suggestions were reviewed. Two are close to downtown and two are farther east and south of downtown. One site downtown (4 to 10 acres) across from and north of the convention center was considered to be well located with respect to the Rouse festival market, downtown hotels and related convention activity and the proposed automated skyway. However, as the concept of the project clarified, the charrette group preferred freeway orientation (to I-95 and I-10 proximity and visibility) rather than downtown orientation. Site 4 on McCoy Creek with 20 acres possibly available is considered to be the best of those
discussed. It is under the control of the Jacksonville Transportation Authority. Precise location of the 4 sites discussed is shown in Figure 1.

The group steered away from downtown orientation primarily because the numbers of tourist visitors available there are relatively small in the total. Rouse will change this somewhat, but this project is best served if located where it can attract attendance from the float of highway visitors in the area both destination and pass through. Location near Rouse with its resident market orientation is less important for a tourist visitor attraction of the kind contemplated than prime access to the freeway systems coupled with the availability of low cost land.

The project cannot sustain an exhorbitant price for land acquisition. In that regard, tax increment financing is available in a district east of I-95. The City can assist in land acquisition in other ways; for example, Rouse is paying $100,000 rent for exceedingly valuable land, a direct subsidy. Revenue bond and/or land leasing may be available to assist the project. Condemnation processes may be available to assist site acquisition.

Until recently, the city fathers and populace had not wanted to be in the tourist business and, hence, had not encouraged or sought tourist related businesses. Recently, however, that attitude has changed dramatically and there is a great deal of interest in and support for such activity. The general infrastructure is in place, although much has to be done to clear and prepare any site chosen. It is believed that the city will assist in every reasonable way.

Additional site search and evaluation will be appropriate in Phase 2 work on the project.
Figure 1
SITE LOCATIONS
Competitive Attraction

The development of attractions in the area is nominal with venerable Marineland of Florida at St. Augustine, the largest draw (reported to be somewhere around the 350,000 mark). St. Augustine has a number of smaller attractions—the old fort and Old House, Ripley's, the Alligator Farm and the Fountain of Youth. The dog races and the beaches are important attractions as are the resort communities of Amelia Island, Ponte Vedra and Sawgrass.

In Jacksonville itself, there is an Anheuser-Busch Brewery Tour, a nominal draw, and virtually nothing else worthy of mention—the field is open.

The operating season of the attractions are generally year round, although the bulk of the attendance is in typical tourist seasons. Summer is the high season with a fairly good Christmas and winter season attendance. Admission prices, though not specifically reviewed in the charrette, are presumed to be on the low end.

The Rouse Riverfront Festival Marketplace is scheduled to open in June 1987 with 125,000 square feet. Its economics are predicated on an annual transaction base of some 6 million or more. This project in general adds to the stopover quality of the market place even though it will depend primarily for its support on local residents and office workers, destination tourists and business visitors now staying in the market area. Although the Riverfront Marketplace is a very positive influence, it is not directly synergistic to Florida Discovery which intends to gain its support from a different crowd—primarily from the large flow of pass-through and family oriented tourism and secondarily from the resident market.
Market Support

Our discussion of the market size/support available to the project yielded these preliminary estimates:

Resident Market Size:

Primary Market (Duval, St. John and North Clay Counties) 750,000
Jacksonville ADI 550,000
Total Resident Market 1,300,000

Tourist Market Sizes (per data compiled by Rouse):

Auto Visitors to MSA (Duval) 1,200,000
Air Visitors to MSA (Duval) 700,000
Jacksonville visitation 1,900,000
Auto Visitors to St. Johns 950,000
Visitors to balance of ADI 750,000
Tourist Visitors to ADI 3,600,000

Passer-By's 2,600,000
Total Potential Market Size 7,500,000

The resident market has a high growth rate with a large immigration fueling growth. The black population is 30 percent in the metro area; 10 percent in the ADI. The passer-by market in the above table is estimated at 5.5 million primarily on I-95 (plus some flow on I-10 and I-75) less the three auto visitor segments tallied above (1,200,000, 700,000 and 950,000) or 2.6 million.

The new 120,000 square foot convention center is projected to add 180,000 room nights or 250,000 visitors to the City within three years---most of it new trade---which will give the visitor growth rate a healthy tone. It was noted that Florida visitation has a high repeat rate (90+ percent) and that half the visitors do not visit attractions. It is also an older crowd, particularly outside of the summer months. We must create an attraction taking that visitor profile into account.

It should be painless to stop at the attraction (i.e., no gate). It should contain some of the noteworthy characteristics
of other successful major highway stops (i.e., great family style restaurants like Nut Tree and Andersen's) and strong identity (the world's most famous bathrooms were discussed as an example of a high visibility device at successful Madonna Inn).

The 1984 median of tourist family income was $32,000, well above the resident average. Median age was 49. The tourist we aim to please has a higher income, is older and better educated than the average of the population.

Accommodations

A substantial number of rooms service the visitor trade, some 13,000 in the Jacksonville ADI (area of dominant influence). Duval County contains approximately 9,000, the Jacksonville CBD, a nominal 1,400 of which 1,000 are designated first class. Most hotels/motels are peripheral and found on I-95 and on the beaches rather than downtown. Downtown had about 3,000 hotel rooms in prior years but many closed. Downtown is presently underdeveloped with regard to quality hotel/motel rooms. However, the CBD hotel fleet will get a substantial infusion of energy with these scheduled openings:

<table>
<thead>
<tr>
<th>Convention Center</th>
<th>October 1986</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rouse</td>
<td>July 1987</td>
</tr>
<tr>
<td>Omni Hotel (350 rooms)</td>
<td>January 1987</td>
</tr>
<tr>
<td>People Mover</td>
<td>January 1988</td>
</tr>
</tbody>
</table>

For Florida Discovery, the best supporting hotel base is located approximately 15 minutes south on I-95 in the neighborhood of Bay Meadows. A hotel capacity of 13,000 rooms will support a large visitor population, which is computed below using the following factors:

<table>
<thead>
<tr>
<th>Total number of rooms</th>
<th>13,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number per room</td>
<td>2.5</td>
</tr>
<tr>
<td>Average stay</td>
<td>6 days</td>
</tr>
<tr>
<td>Visitors in hotels</td>
<td>60 percent</td>
</tr>
<tr>
<td>Number of days</td>
<td>365</td>
</tr>
<tr>
<td>Occupancy</td>
<td>65 percent</td>
</tr>
</tbody>
</table>
On this basis annual visitor volume would be:

\[
\text{Annual Visitors} = \frac{(13,000) (2.5) (365) (0.65)}{(6) (0.60)} = 22 \text{ million}
\]

Weather

Although the flow of tourism is a year around business in Florida with only 2 or 3 slow months (October, November, May) the climate in Northern Florida is more stringent than that of Central and Southern Florida. It is a mild winter but too cold for the Southbound Snowbird. The summer is hot and humid and rainy. Weatherization of the project—much of it indoors and the rest heavily protected with covered areas and walkways—will be a necessity. That kind of approach will be essential for year around operation.
Section 3

A RECOMMENDED CONCEPT OF DEVELOPMENT FOR FLORIDA DISCOVERY

This section treats the content options for Florida Discovery discussed on the second day of the meeting and based on deliberations of the first day. It expresses the charrette consensus concerning feasibility, suitability and sizing for the alternatives discussed.

Development Parameters

The attraction is not a theme park. It is not a static exhibit. It is open all year and weatherized to accomplish that purpose. It is a gateway, hospitality and orientation center and must fulfill these functions. It is an oasis on the trip from the North to the major attractions in Central and Southern Florida. It should appeal to a family tourist trade with an above average concentration of older population during two-thirds of the year.

Major impact must be achieved to make it work. It aims to be the world's best rest stop--like a truck stop only for tourists on vacation.

Most of its elements and most of its trade are geared to a modest stay time 1½ to 3 hours. Although it can attract an overnight business, it is not a final destination point.

It should be properly priced; it is a good value--not too expensive. It is affordable by large numbers of traveling families.

Products and services are available for user fees on an "a la carte" basis rather than a gate charge.
Recreation, entertainment, food service, shopping and travel services are offered in a pleasant, organized manner reflecting tourist perceptions of Florida as a place in the sun with a lushly landscaped environment. Theming and other devices must be used to establish that this is no ordinary roadside stop. Florida food and merchandise--real or perceived--should be featured.

Although it aims to service a tourist clientele, its products and offerings are good enough to attract the extensive local resident trade.

It is a hospitality center and the training of its staff must reflect that mission--a page from the Disney/Sea World operating approach.

Prototypes

Several operations around the country have developed into mass attraction road stops, many with attendance in the millions. Examples which relate to this purpose are:

Nut Tree - themed restaurant and specialty center between Sacramento and the Bay Area drawing over 5 million.

South of the Border - a major north-south stop in South Carolina.

Pea Soup Andersen's - Andersen's has three operations; one at Buellton between Los Angeles and San Francisco on Interstate 10--attendance over 3.5 million; one on Interstate 5 also between Los Angeles and San Francisco and one in Carlsbad between Los Angeles and San Diego--attendance over 6 million.

Zenders at Frankenmuth, Michigan - a German town stopping point on tourist routes north out of Detroit--drawing over 2.5 million. It's two main restaurants, Zenders and the Bavarian Inn, entertain about 1 million diners each per year.

-14-
**Madonna Inn** - a large, extravagantly themed motel midway between Los Angeles and San Francisco, famous for its bathrooms and rococo design.

**Harris Ranch** - a Mexican hacienda themed rest stop on barren Highway 5 between Los Angeles and points north--attracting well over 2 million.

**Peter Pan** - a giant family-styled restaurant complex in Frederick, Maryland.

**Zabors** - an attraction complex near Atlantic City.

**Hadley's - Banning, California** - on the east-west route out of Los Angeles near Palm Springs on Interstate 10 (the old U.S. 66). It draws over 3 million and features California citrus, dates and other specialty foods.

The above are all successful oasis stops that became mass attractions because they featured some kind of simple quality with a flair. Themed food, merchandise and accommodations service are typical in all of these places along with certain recreation elements.

In addition to these stops, several themed restaurant and entertainment centers shed light on approaches that may be applicable in the Jacksonville area. Specifically referenced by the charrette were Casa Bonita in Denver--a highly themed Mexican restaurant drawing over 1.5 million patrons, Billy Bob's in Fort Worth--a Country and Western entertainment complex of diverse content drawing over a million and Rosie O'Grady's Church Street Station in Orlando--a novel themed specialty entertainment complex.
In these places we find approaches to theme and content that set the place apart and are successful in attracting large visitation from major highway routes. This is the nature of the opportunity in Jacksonville at Florida Discovery.

Specific Content of the Attraction

The charrette group selected the following content elements to create the kind of rest stop impact that is required:

I. Food Service

1. A themed family restaurant, of 500 seats, heavily related to Florida background. It would have several sections to express different facets of that story material. Like the prototype stops listed above (the Nut Tree, Pea Soup Andersen's, Zenders, Peter Pan, Casa Bonita, Zabors, Harris Ranch) it would stress good value, good tasting, large portions and moderate price in a themed ambience—fish, birds and lush planting on display. Its menu orientation should make a strong statement about the best of Florida. It could contain:
   - fresh fish from the local area
   - Key lime pie
   - Florida fried chicken
   - shrimp and hush puppies
   - catfish and hush puppies
   - conch chowder
   - special breads
   - fresh juice and fruit served at the table—perhaps free of charge
   - an outstanding soup in a crock service

2. Citrus center and snack bar/deli themed on citrus industry products. It would be located near the high tech gas station and convenience store for those who want a bite to eat but don't want to stop for 1.5 to 3 hours to eat and play.

II. Merchandising

1. Gift shops
   - 5,000 square feet of gift and souvenir shopping opportunities accenting Florida souvenir selections
   - wearables shop (T-shirts, swim and swimwear, etc.)
   - nicer craft and gift merchandise with emphasis on tropical, marine and Florida products.
   - citrus fruit stand (with shipping capabilities)
   - book shop
2. Convenience store (1,000 square feet) comparable to a first class 7-Eleven Store with emphasis on picnic and snack foods and items that appeal to or are needed by tourists on the road.

III. Accommodations

1. A 200-key, themed motel with room for future expansion. The theme was not identified but it could have something to do with the fish, birds, flora and fauna and the waterways of Florida. The motel would have meeting rooms, indoor/outdoor pool and spa.

IV. Services

1. Awesome restrooms, perhaps in the mode or manner of the Madonna Inn, an "attraction" or "experience" in their own right.

2. Phone bank.


4. New resident information center (if sponsored).

5. Tourist information center/reservation referral service.

6. Photo opportunities and services.

V. Show Program

1. Centerpiece of Florida Discovery is a very large map of Florida, a less capital and labor intensive variation of the original concept for the attraction. It is:
   - 250 feet long, landscaped map of Florida comprised of grass and shrubbery;
   - the map is surrounded by water with electric powered boats in the water, flamingos and other exotic birds;
   - major highways in the state would function as walkways to allow guests to "walk" the entire state;
   - this entire landscaped map would serve as the focal point of the attraction and a view point for the themed restaurant;
   - cities, and maybe other selected areas, could be made of aerial photographs imbedded in ceramic tiles.

Two rough sketches of the "super map" in plain view—as roughed out by Alan Eskew during the charrette are included as Figure 2 for interest and clarification. The map has an indoor/outdoor "feel" or concept that is relatively inexpensive to build. It does not involve expensive audio-animatronics or full exhibit structure and equipment. It can be walked on. It is a simulated
tour of Florida in a garden like setting, a mosaic portrayal of the state. As shown in Figure 2, it is built in a courtyard surrounded by water setting the state off as it actually is. Random special effects are applicable without heavy cost exhibitry.

A prototype for this installation is the giant map of Japan shown this year in the Tsukuba World's Fair--built from NASA aerial photos in tile on a scale of 1:10,000. This technique (photography on tile) would be applied to points of interest in the Florida map.

2. A theater (seating 100-150) showing the Florida Department of Tourism film or a comparable 8 to 12 minute show highlighting the beauty and attractions of Florida. This is an excellent film which has been seen by few visitors.

3. A museum (2,000 square feet) featuring exhibits and artifacts of sunken and lost treasures in and around Florida.

4. A museum (1,000 square feet) highlighting the history of tourism in Florida. These museums function as something of a pre-show to the restaurant schedule.

5. Radio-controlled boats (located in the water area around the giant map).

6. Children's play/recreation area--1/2 acre McMillan type play area for children, many physical, energy releasing kinds of activities/equipment.

7. A large illuminated vertical, electronically operated map of Florida showing visitors what is happening and where.

The idea of using McCoy Creek and a water transport system to develop a two site project with an extension near Rouse was discussed but not developed.

Also discussed was the idea of using one of the museums to show an honor role of Florida tourist developers, a hall of fame as it were. The project would honor people like Walt Disney, Mr. Pope, Mr. Busch, George Millay, Mr. Jovanovich and Irvin Feld and others--those who have increased the immense tourism of Florida by creating major attractions of quality.

VI. Auto Service

1. A high tech gas station containing a place of amazement to create a memory such as:
- a car wash (cheap and fast)
- full service with a smile
- many lanes, large size
- impeccably clean rest rooms-like Disney
- other distinguishing characteristics yet to be conceived.

VII. Site Amenities

1. Auto and bus parking, bermed and landscaped with senior citizen preference.
2. Signature pylon.
3. Entrance statement.
4. Site oasis landscaping possibly with some topiary treatment.
Section 4

LAND AND BUILDING AREAS AND
CONSTRUCTION AND DEVELOPMENT COSTS

The charrette group estimated land and building areas and construction costs for all elements of the project as shown in Table 2. Land area on this cut without any allowance for expansion is 11.6 acres. Total construction cost is $21,852,000.

Development costs of the project with and without the themed motel area are tentatively estimated in Table 3. With the motel the project totals $29.13 million with a 10 percent contingency and no land cost. Without the motel the project totals $14.094 million with a 10 percent contingency and no land cost.

Potential revenue of the project is detailed in Table 4. Operating all elements produces annual gross revenue of $9.935 million. If the gas station and motel are leased out, net revenues are $6,417,000.
<table>
<thead>
<tr>
<th>Service Type</th>
<th>Land Area (s.f.)</th>
<th>Building Area (s.f.)</th>
<th>Unit Cost ($ s.f.)</th>
<th>Total Cost ($000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0 Food Service</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1 Themed Family Restaurant</td>
<td>12,000</td>
<td>15,000</td>
<td>$167</td>
<td>$2.500</td>
</tr>
<tr>
<td>1.2 Citrus Center</td>
<td>1,200</td>
<td>1,000</td>
<td>90</td>
<td>0.090</td>
</tr>
<tr>
<td>1.3 Snack/Deli</td>
<td>600</td>
<td>500</td>
<td>120</td>
<td>0.060</td>
</tr>
<tr>
<td></td>
<td>11,800</td>
<td>16,500</td>
<td></td>
<td>$2.650</td>
</tr>
<tr>
<td>2.0 Merchandising</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>2.1-2.5 Gift/Souvenir Shops</td>
<td>5,000</td>
<td>2,000</td>
<td>125</td>
<td>$0.625</td>
</tr>
<tr>
<td>2.6 Convenience</td>
<td>1,000</td>
<td>80</td>
<td>65</td>
<td>0.013</td>
</tr>
<tr>
<td>2.7 Sun Health Ctr.</td>
<td></td>
<td>200</td>
<td>65</td>
<td>0.013</td>
</tr>
<tr>
<td></td>
<td>9,840</td>
<td>8,200</td>
<td></td>
<td>$0.838</td>
</tr>
<tr>
<td>3.0 Hotel</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.1 200-Key Motel</td>
<td>72,000</td>
<td>120,000</td>
<td>$55k/room</td>
<td>$11,000</td>
</tr>
<tr>
<td>4.0 Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.1 Awesome restrooms</td>
<td></td>
<td></td>
<td></td>
<td>$0.150</td>
</tr>
<tr>
<td>4.2 &amp; 4.3 Info and Reservations</td>
<td>960</td>
<td>800</td>
<td>$150</td>
<td>0.120</td>
</tr>
<tr>
<td>4.3 Promotional kiosks</td>
<td></td>
<td></td>
<td></td>
<td>---</td>
</tr>
<tr>
<td>4.4 New Resident Info Sponsored</td>
<td></td>
<td></td>
<td></td>
<td>---</td>
</tr>
<tr>
<td>4.5 Banking</td>
<td></td>
<td></td>
<td></td>
<td>---</td>
</tr>
<tr>
<td>4.6 Phone Bank</td>
<td></td>
<td></td>
<td></td>
<td>0.015</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$0.285</td>
</tr>
<tr>
<td>5.0 Show</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.1 Florida Discovery Map</td>
<td>62,000</td>
<td>62,000</td>
<td>$48</td>
<td>$3.000</td>
</tr>
<tr>
<td>5.2.1 History of Tourism</td>
<td></td>
<td></td>
<td></td>
<td>---</td>
</tr>
<tr>
<td>5.2.2 Florida Treasures</td>
<td>2,400</td>
<td>2,000</td>
<td>$300</td>
<td>0.850</td>
</tr>
<tr>
<td>5.2.3 Electronic Map +$250k</td>
<td></td>
<td></td>
<td></td>
<td>---</td>
</tr>
<tr>
<td>5.2.4 Toy Boats</td>
<td></td>
<td></td>
<td></td>
<td>0.050</td>
</tr>
<tr>
<td>5.3 Mini Play Park</td>
<td>5,000</td>
<td>5,000</td>
<td></td>
<td>0.250</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$4.150</td>
</tr>
<tr>
<td></td>
<td>Land Area (s.f.)</td>
<td>Building Area (s.f.)</td>
<td>Unit Cost ($ s.f.)</td>
<td>Total Cost ($000)</td>
</tr>
<tr>
<td>---------------</td>
<td>------------------</td>
<td>----------------------</td>
<td>--------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td><strong>6.0 Auto Services</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.1 Station</td>
<td>40,000</td>
<td>2,000</td>
<td>---</td>
<td>$0.250</td>
</tr>
<tr>
<td>6.2 Car Wash</td>
<td></td>
<td></td>
<td>---</td>
<td>$0.050</td>
</tr>
<tr>
<td><strong>7.0 Site Amenities</strong></td>
<td></td>
<td></td>
<td></td>
<td>$0.300</td>
</tr>
<tr>
<td>7.1 Auto &amp; Bus Parking (700 cars)</td>
<td>284,000</td>
<td>---</td>
<td>$3.50</td>
<td>$0.994</td>
</tr>
<tr>
<td>7.2 Signature Pylon</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>0.200</td>
</tr>
<tr>
<td>7.3 Entrance Statement &amp; Landscaping</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>0.250</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$1.444</td>
</tr>
<tr>
<td><strong>8.0 Building Common Areas</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8.1 Administration</td>
<td>---</td>
<td>5,000</td>
<td>$70</td>
<td>$0.350</td>
</tr>
<tr>
<td>8.2 Common Seating &amp; Promenade</td>
<td>---</td>
<td>8,000</td>
<td>$60</td>
<td>0.480</td>
</tr>
<tr>
<td>8.3 Furnishing/Fixtures</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>0.200</td>
</tr>
<tr>
<td>8.4 Graphics</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>0.150</td>
</tr>
<tr>
<td></td>
<td>15,600</td>
<td></td>
<td></td>
<td>$1.180</td>
</tr>
<tr>
<td><strong>GRAND TOTAL</strong></td>
<td>505,600</td>
<td></td>
<td></td>
<td>$21.852</td>
</tr>
<tr>
<td></td>
<td>or 11.6 acres</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1 10,000 square foot footprint.
2 Phase 1 is 200 rooms with indoor pool and 1-2 meeting rooms.
Table 3  
PROJECT DEVELOPMENT COSTS - FLORIDA DISCOVERY

<table>
<thead>
<tr>
<th></th>
<th>With Motel</th>
<th>Without Motel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction Cost</td>
<td>$21,852,000</td>
<td>$10,852,000</td>
</tr>
<tr>
<td>A &amp; E Costs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7% of $16.3 million</td>
<td>1,147,000</td>
<td>590,000</td>
</tr>
<tr>
<td>7 1/4% of $8.1 million</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Design Costs</td>
<td>325,000</td>
<td>325,000</td>
</tr>
<tr>
<td>Interim Financing</td>
<td>2,622,000</td>
<td>1,302,000</td>
</tr>
<tr>
<td>Pre-opening Expenses</td>
<td>1,000,000</td>
<td>750,000</td>
</tr>
<tr>
<td>Contingency - 10 percent</td>
<td>2,185,000</td>
<td>1,085,000</td>
</tr>
<tr>
<td></td>
<td>$29,131,000</td>
<td>$14,094,000</td>
</tr>
<tr>
<td>Rounded Off Total</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exclusive of Land</td>
<td>$30,000,000</td>
<td>$15,000,000</td>
</tr>
</tbody>
</table>
Table 4

POTENTIAL GROSS AND NET REVENUES
OF THE PROPOSED PROJECT

<table>
<thead>
<tr>
<th>Description</th>
<th>Gross Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurant ($9.00 average check: $7.50 food and $1.50 beverage) 500,000 covers</td>
<td>$4,500,000</td>
</tr>
<tr>
<td>Citrus/Snack Stand - 1,500 s.f. at $300/s.f.</td>
<td>$450,000</td>
</tr>
<tr>
<td>Gifts and Souvenir Stores - 6,000 s.f. at $200/s.f.</td>
<td>$1,200,000</td>
</tr>
<tr>
<td>Gas Station</td>
<td>$1,000,000</td>
</tr>
<tr>
<td>Motel - 51,100 room nights at $54.50/room</td>
<td>$2,785,000</td>
</tr>
</tbody>
</table>

Total Potential Revenue: $9,935,000

Less Gas Station at $100k lease income ($900,000)
Less Motel at 6 percent ground lease (2,618,000)

Net Revenues: $6,417,000
Section 5

CONCLUSIONS

Conclusions drawn from the charrette consensus are highlighted as follows:

- The revised project developed by the charrette group appears to have achieved a required balance and a sound basic concept. It would be the world's first major rest stop in Florida located between the East Coast and Florida's attractions center. A sufficiently broad and compelling package of services, food and entertainment components to get tourists to stop and local residents to come again and again appears to have been developed. The estimated revenues (very conservatively estimated) should be able to make financial sense. Given the estimated costs of construction, reasonable prospects for economic feasibility are indicated.

- Given the lack of attractions for tourists in Jacksonville, the backing available from the city, the large number of tourists travelling through the area plus a sizable local resident market, this concept should be viable and ought to be pursued, refined and necessary adjustments made to bring it to market.

- The project described requires skill in execution and operation but examples of tourist stops successfully achieving mass attraction status abound. The point of the exercise is to bring that kind of execution to Jacksonville, an unserviced market area. The architecture employed must express a sense of wholeness and avoid the ersatz. Showmanship must be outstanding. The place must not look like a tourist joint.
The project is geared to local tourism but it will benefit greatly from acceptance by the resident market. Many major prototype attractions discussed herein do outstandingly well in the resident trade. Special promotions in the local community will aid that objective. In this regard, the absence of a gate charge is a significant strategy.
Chassette Conference

Development Potential for Florida Tobacco
in Jacksonville, Florida

October 21-22, 1985

Prepared by:
Harrison Price Company
366 S. Bronson Ave
Los Angeles, California 90015
213-937-3457
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- Competitive Analysis
- Market Survey
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- Weather

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- Development Planner
- Property for Specific Development of the ATTACTION
- Conclusions
- Land and Building Areas and Costs

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Table 2  Land and Building Areas and Costs.
Section I
INTRODUCTION

Hansen Price Company was retained in October 1985 to organize and carry out a feasibility conference directed at defining an optimum concept and tentative economic potential for the Florida Discovery project, an undertaking conceived with purpose of stopping the extensive visitor pass through traffic in and around Jacksonville, Florida in an active commercial attraction.

Quoting from the proposal which launched this project:
Jacksonville has long been a victim of the pass-through phenomenon in the heavy tourism of Florida. It has an entry or gateway location but people visiting the state hurry by enroute to the many highly developed tourist destinations of the state. Mr. Jim White and his friends have been talking about a project called Florida Discovery which would provide an orientation to the State and various support services in an entertainment attraction appropriate to an entry location on the tourist circuit. The project would be strategically located within the city of Jacksonville close to the Interstate Highway. Precise content of the project is still to be finalized but discussions to date have suggested the following elements:

1. A giant map/model of the state showing all the attractions available to tourists in Florida. It is visualized as a 1/2-acre presentation which would be electronically articulated to respond to visitor requests for information.

2. An orientation center which would make available reservations and ticketing information for attractions and accommodations throughout the state.

3. Specific services like food and beverage, gas and oil, a specialized bookstore and souvenir merchandise catering to tourist interests.

4. Some kind of museum/exhibitry dealing with the history and lore of the state, its explorations and treasures.

5. Other attraction elements yet to be conceived.

Some of the initial planning parameters discussed are a project cost of $20 million to $30 million; visitor space of 300,000 square feet and a 10-acre site. Specific sizing and content elements are yet to be developed. It is hoped that the project can do a major job of stopping the visitor flow, generating attendance above one million.
The purpose of the charrette was to assemble a group of experienced recreation and attraction experts, who would in an intensive two day, uninterrupted conference:

- evaluate the essential economic performance and operating parameters of the proposed concept avoiding any built-in "preordained path";
- determine the adjustments and refinements of concept which will result in a feasible balance of attraction, power, capacity and staytime, attendance and revenue generation and cost of development;
- create a program for the venture appropriate for ensuing stages of detailed feasibility analysis, schematic development, financing and subsequent implementation.
Participants were selected for the range and quality of their experience, particularly at Busch Gardens. Alan Erskine was responsible for the site development plan at New Orleans for Louisiana Exposition and heads up an architectural practice with a heavy focus on recreation projects. Harry Weller is a principal in a very successful design practice at leading amusement parks and related attractions. Nick Winslow (who was former head of the Space Needle Corporation) has an extensive background in attraction management at Six Flags and the Space Needle. Geokey Harrison is a successful independent attraction designer with extensive experience in the amusement park field—particularly at Busch Gardens. Alan Erskine was responsible for the site development plan at New Orleans for the Louisiana Exposition and heads up an architectural practice with a heavy focus on recreation projects. Harry Weller is a principal in a very successful design practice at leading amusement parks and related attractions. Nick Winslow (who was former head of the Space Needle Corporation) has an extensive background in attraction management at Six Flags and the Space Needle.
## Table 1

### List of Participants

<table>
<thead>
<tr>
<th>Participant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Janice Kintz</td>
</tr>
<tr>
<td>James L. White III</td>
</tr>
<tr>
<td>Tom Evans III</td>
</tr>
<tr>
<td>Carol</td>
</tr>
<tr>
<td>Thomas Mabrey, Conceptional Man.</td>
</tr>
<tr>
<td>Florida Discovery &amp; the City of Jacksonville</td>
</tr>
<tr>
<td>Harry L. Willm Jr.</td>
</tr>
<tr>
<td>Designer and Product, Inc.</td>
</tr>
<tr>
<td>Brady Larkins</td>
</tr>
<tr>
<td>Brady Larkins Associates</td>
</tr>
<tr>
<td>R. Allen Eskew</td>
</tr>
<tr>
<td>Eskew, Vogt, Salato and Filson</td>
</tr>
<tr>
<td>Hanson A. Price</td>
</tr>
<tr>
<td>Nicholas S. Winslow</td>
</tr>
<tr>
<td>Hanson Price Company</td>
</tr>
</tbody>
</table>
and furnace price between them
have an extensive background in economic
planning and
feasibility analysis for a wide range of
attractions. As head of Paramount's
Feature General, Willott has specific
background in filmic and other
high technology approaches to
the attractions industry.

The group assembled
at the Sherman at St. John's
Place for the two days October 21st
and 22nd of 1985. Operating in the original
story board conference style, an
agenda was prepared as a rough
road map for the meeting. It is
outlined as follows:

1. Introduction and orientation
   - Participants
   - Role of this charrette in the planning process

2. Project background
   - Development objectives
   - Review of site characteristics (size, location,
     accessibility, surrounding land uses)
   - Possible constraints on operations (weather
     conditions/seasnonality, site terrain, local
     availability of supporting infrastructure-
hotels/motels, campgrounds, food service)

3. Preliminary indications of market support
   - Resident market size and characteristics
   - Tourist market
   - Competitive environment (other attractions in area and
     attendance experience)
   - Visitor accommodations in the area
4. Experience of other attractions in the area
   - Market penetration and attendance
   - Operating season
   - Admission prices

5. Basic development parameters
   - General scope of project vis-a-vis indicated market
     support
   - Recommended operating season
   - Visitor length of stay objective

6. Specific content
   - Thematic orientation
   - Entertainment/recreation activities
   - Food/beverage service facilities
   - Merchandise sales facilities
   - Administrative and support facilities
   - Probable phasing of development

7. Preliminary estimates for proposed attraction
   - Market penetration and attendance
   - Design day attendance
   - Physical capacity requirements
   - Overall acreage requirements (first phase plus future
     expansion)

8. Summary and adjournment
   - Recap of charrette findings
   - Projected schedule of completion of summary paper
   - Assignment of individual responsibilities and follow
     up input from participants
   - Adjournment

The first day focused on the market setting and the proposed
concept for the project. The second day the group attempted to come to grips
with appropriate redirection of the concept and a plan of action for implementation
of the project.
The writings that follow attempt to highlight and summarize the consensus of the participants in the charrette. Although opinions were diverse, the group was essentially unanimous on most key elements—particularly in reference to the formal concept, the positioning of the opportunity, and the general outline of their content.
Section II
The Project Environment

Considerable time was spent evaluating given factors in the environment - site availability, competitive attractions and the market place.

Site Requirements and Availability

The size of site required for the project was estimated as follows:

<table>
<thead>
<tr>
<th>Site Requirement Per Millim Attendee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peak Month (at 15%)</td>
</tr>
<tr>
<td>Peak Week (Divide by 4.13)</td>
</tr>
<tr>
<td>Peak Day (at 20%)</td>
</tr>
<tr>
<td>Average in Site Peakutmimum (36%)</td>
</tr>
<tr>
<td>Acreage required (at 500/acre)</td>
</tr>
<tr>
<td>Visitor Parking</td>
</tr>
<tr>
<td>Employee Parking</td>
</tr>
<tr>
<td>Acreage for parking</td>
</tr>
<tr>
<td>Total Acreage Per Millim</td>
</tr>
<tr>
<td>Expansion (50 to 100%)</td>
</tr>
<tr>
<td>Total Site Required Per Millim attend</td>
</tr>
</tbody>
</table>

Specific properties, two are close downtown and two on east of downtown. One site downtown provides for convention center. One location is considered to be well located with respect to the house and potential traffic and the proposed automated highway. As the concept of the project clarified, the overall location presents advantage in the downtown orientation rather than downtown presentation. Site 4 on with 20,000 acres, considered to be the best of those discussed. It is under the control of the Jacksonville transportation authority. Precise location of the 4 sites discussed shown in Figure 1.
The group steered away from downtown orientating because the numbers of tourist contacts available there are small in the city. Hence, will rely on contacts, but this project is best served while it can attract attendance from the float of highway visitors in the area. Both destination and pass-through tourism are important to Pouge for a tourist tourist attraction of the kind contemplated. Venus is important than from access to the freeway system, coupled with the availability of city land. The project cannot sustain an exorbitant price for land acquisition.

In that regard, tax increment financing is available in a distinct list of 1-95. The city can assist in land acquisition in various ways. For example, Pouge is paying $100,000 rent for land, and the district subsidy. Revenue bond and or land bonding may be available to assist the project. Condemnation processes may be available to assist site acquisition.

Additional site evaluation will be appropriate in Phase II work on the project.

Until recently, the city fathers and populace had not wanted to be in the tourist business and, hence, had not encouraged or sought tourist related businesses. Recently, however, that attitude has changed dramatically and there is a great deal of interest in and support for tourist related businesses. The general infrastructure is in place, although much work to be done to clear and prepare the site chosen. It will assist in every reasonable way.
Competitive Attractions

The attractions in the area are normal with marine studies at St Augustine, the largest draw (reported to be somewhere around the 350,000 people annually). St Augustine has a number of smaller attractions - the St Augustine Alligator Farm and the Beaches are important attractions.

In Jacksonville itself, there is an Audubon Park, a museum and virtually, nothing else worthy of mention - the fields is open.

The operating season of the attractions are generally year round, although the bulk of the attendance is in typical tourist seasons. Summer is the high season with a fairly good Christmas and winter season attendance.

Admission prices, though not specifically reviewed in the charrette, are on the low end, assume.

The House Riverfront Festival Marketplace is scheduled to open in June 1987. At 125,000 square feet it is predicted on an annual transaction base of some 6 million or more. It will add to the stopover quality of the market place even though it will depend primarily for its success on local residents and visitors in the market area, not directly synergistic to Florida Discovery which intends to gain its support from a different source - from the flow of others through and perhaps more from the resident market.
Market Support

Preliminary study of the market size/support available following information to the project yielded these preliminary estimates:

Resident Market Size:
- Primary Market (Duval, St. John and North Clay counties)    750,000
- Jacksonville ADI                                              550,000

Total Resident Mkt    1,300,000

Tourist Market Sizes (per data compiled by Rouse):
- Auto visitors to MSA (Duval)                                   1,200,000
- Air visitors to MSA (Duval)                                    700,000
- Jacksonville visitation                                       1,900,000
- Auto visitors to St. Johns                                     950,000
- Visitors to balance of ADI                                     750,000
- Tourist visitors to ADI                                         3,000,000

Passer-By's                                                      2,600,000

Total Potential Market Size                                      7,500,000

The resident market has a high growth rate with a
large immigration feeding growth. The 1970 U.S. Census population is 107,000 in the metro area.

The pass-by market is estimated at 5.5 million persons (plus auto on I-75, and 1-75) less the three auto visitor
segments talked about (1,200,000, 700,000, and 950,000) or 2.6 million.

The new convention center is proposed to add 1,300,000 room nights to 2,500,000 visitors a year.

New hotel which will give the visitor a healthy mix.
It was noted that Florida visitation has a high repeat rate and that half the visitors do not visit attractions. It was also an older crowd particularly outside of the summer months. We must create an attraction taking that visitor profile into account.

It should be painless to stop at the attraction, i.e., no gate. It should contain some of the noteworthy characteristics of other successful major highway stops, i.e., great family style restaurant like that of Frey, Anderson's and strong identity (the world's most famous bathrooms of a high visibility device that were discussed as an example, successful Madonna Inn).

The 1984 median of tourist family income was $37,000 above the resident average. Median age was 49. The tourist we aim to please has a higher income, is older and better educated than the average of the population.
Accommodations:

A substantial number of rooms service the resort trades, some 13,000 in the Jacksonville ADI (Area of dominant interest). Duval County contains approximately 9,000, the Jacksonville CBD, a normal 1400 of which 1000 are designated first class.

Most hotels/motels are peripheral and found on I-95 and on the beaches rather than downtown. Downtown had about 3,000 hotel rooms just a few years ago but many are closed because of their overall deteriorating quality. Downtown is presently underdeveloped with regard to quality hotel/motel rooms.

Note however, that the CBD hotel fleet should get a shot in the arm with these scheduled openings:

- Convention Center 10/86
- Rouse 7/87
- Omni Hotel (350 rooms) 11/87
- People Mover 11/88

For Florida Deucey, the best hotel base is 10-15 minutes south on I-95 in the neighborhood of Bay Meadows.
A hotel capacity of 13,000 rooms will support a large visitor population using the following factors:

- Total No of Rooms (13000) 13,000
- Number Per Room (2.3)
- Average Stay (8 days)
- Visitors in Hotels (70%)
- Number of Days (365)
- Occupancy (60%)

Annual visitor volume would be:

\[
\text{Annual Visitors} = \frac{13000 \times 2.3 \times 365}{8 \times 0.70 \times 0.60}
\]

\[= 3,250,000\]

The above factors are illustrative only but they are reasonable suppositions and balance well with the prior estimate of 3.6 million tourist visitors.
Weather

Although the flow of tourism is annual driven in Florida with only 2 or 3 slow months (October, November, May), the climate in Northern Florida is more stringent than that of Central Florida. It is drier and cooler in the winter for the southbound snowbird. The weather is so soft and peaceful and sunny.

Much of the work indoors, and the rest heavily protected with covered areas and walkways will be a necessity. That kind of approach will be essential for year around operation.
Section III  
A Recommended Concept of Development For Florida Discovery

This section treats the content options for Florida Discovery discussed on the second day of the meeting and based on deliberations of the first day. It expresses the Charnette consensus concerning feasibility, suitability and sizing for the alternatives discussed.

Development Parameters

The attraction is not a theme park. It is not a static exhibit. It is open all year and weatherized to accomplish that purpose.

It is a gateway, hospitality and orientation center and must fulfill those functions. It is an oasis for the tired from the North to the Major attraction in central and southern Florida. It should appeal to a family of moderate trade with a concentration of older 4 during 2/3 of the year.

Major impact must be achieved to make it work. It's the world's best rest stop like a truck stop only for tourists on vacation.
Most of its elements are geared to a modest staytime 1½ to 3 hours. Although it can attract an overnighting visitor, it is not a final destination point.

It should be popularly priced; it is a good value not for expense, it is affordable by large numbers of travelling families.

Products and services are available for user fees on an "a la carte" basis rather than a gate charge.

Recreation, entertainment, food service, shopping, and travel services are offered in a pleasant, organized manner reflecting tourist perceptions of Florida as a place in tune with a lushly landscaped environment. Theming and other devices must be used to establish that this is an extraordinary roadside stop. Florida should be featured.

Although it aims to serve a tourist clientele its products and offerings are good enough to attract the extensive local resident trade.

It is a hospitality center, and the training of its staff must reflect that mission—a page from the Disney/SeaWorld operating approach.
Prototypes

Several operations around the country have developed into many attraction road stops with attendance in the millions. Examples which relate to this purpose are:

Nate Tree (between Sacramento and the Bay Area, drawing over 5 million north south)

Sout of the Border (a major stop in South Carolina)

Pea Soup Anderson's (alt. Solvang between LA and San Francisco, attendance over 3.5 million; on Highway 5 also between LA and San Francisco and one near Oceano, CA between LA and San Diego - attendance over 6 million)

Jenders at Frankenmuth, Michigan

Madonna Inn - a large themed motel midway between LA and San Francisco - famous for its bathrooms and rococo design

Harris Petel - a Mexican-themed rest stop on Highway 5 between LA and Phoenix - attracts well over 2 million

Peter Pan - a themed restaurant complex in Frankenmuth, MI

Zakoffs - an attraction complex near Atlantic City

Hadleys on the East West Route - near LA - near Palm Springs - on I-10 (the old Route 66) - attracts over 3 million a year features California citrus and dates and other specialty
The above are all successful basis stops that became major attractions because they featured some level of simple quality with a flair. Food, merchandising, and accommodations service are typical in all of them along with certain elements.

In addition to these, there are several themed restaurant and entertainment centers that might be considered the Jacksonville area. Specifically:

- Casa Bonita in Denver - a Mexican-themed restaurant drawing over 1.5 million patrons.
- Billy Bob's in Fort Worth - an entertainment complex of diverse content drawing over a million and Churchill Street Station and Rosie O'Grady's in Orlando - a novel themed specialty entertainment complex in Orlando.

On these places, we find entertainment that will give the visitors a sense of place and make it appear that it is part of the normal atmosphere.

We are attempting to visualize ideas for theme of Florida Discovery that for visitors will stop at Missouri people.

To theme and content that not the place apart and are successful in attracting large visitation from major highway routes. This is the nature of the opportunity in Jacksonville at Florida Discovery.
Specific Content of the Attack

The chancette group selected the following content elements to create the kind of rest stop impact that is required:

1. A themed family restaurant heavily related to Florida background. It would have several sections to express different facets of that story material. Like the prototype stops listed above (The Nut Tree, Pea Soup Anderson, Zender's, Peter Pan, Casa Bruna, Zabors, Paris Ranch) it would stress good value, good tasting, large portions, great value, and moderate price. A themed ambiance - fish, birds and lush planting on display.

Its menu orientation should include a strong statement about the heat of Florida. It could contain:

- Fresh fish from the local area
- Keylime pie
- Florida fried chicken
- Shrimp and hush puppies
- Catfish and hush puppies
- Conch chowder
- Special breads
- Fresh juices and fruit served at the table - perhaps free
- An outstanding soup or crock service
2. Citrus center and Smack Bar/deli themed on citrus industry products. It would be located near the high-tech gas station and convenience store for those who want a bite to eat but don't want to stop for 1 1/2 to 3 hours to eat and play.

II Merchandising

1. Gift shops - 5000 square feet of gift and souvenir shopping opportunities, accenting Florida souvenir selections.
   - Wearable shop (T-shirts, scarves and sunwear etc.)
   - Gift shop (nice craft and gift shop with emphasis on tropical, marine and Florida products)
   - Citrus fruit stand (with juicing capabilities)

2. Convenience Store (overnight)
   Comparable to a first class 7-11 store with emphasis on premium and snacking foods and items that appeal to those needing a snack on the road

III Accommodations

1. A 200 key themed motel with room for future expansion. The theme was not identified but it could have something to do with the fish, birds, flora and fauna and the waterways of Florida. The motel would have meeting rooms, indoor outdoor pool and spa.
IV Service

1. Awesome restrooms perhaps in the mode or "manner of the Madonna Inn" an "attraction" or "experience" in their own right.
2. Phone bank
3. Sponsored promotional picks
4. New resident information center (if planned)
5. Forest information center
   reservation referral service
6. Photo opportunities and services

IV Show Program

1. Centerpiece of Florida Discovery is a very large map of Florida. A variation of the original concept for the attraction. It is:
   - 250' long landscaped map of Florida comprised of grass and shrubbery;
   - Map surrounded by water with electric powered boats in the water, flamingos and other exotic birds;
   - Major highways in the state would be sidewalks to allow guests to "walk" the entire state;
   - This entire landscaped map would serve as the focal point of the attraction with the themed restaurant and cities, and maybe other selected areas, could be made of aerial photographs imbedded in ceramic tiles.

Rough "two blackboard sketches of the "map" - as roughed out. The blueprints are included as Figure 2 for interest and Sanitation.
The map has an indoor/outdoor feel or concept that is relatively inexpensive to build. It does not require expensive audio-animatronics or full exhibit and equipment structure. It can be walked on. It is a simulated tour of Florida in a garden setting, among the streams in a courtyard surrounded by water setting the state off as it actually is. Random special effects are applicable without heavy cost exhibiting.

A prototype for this installation is the giant map of Japan shown this year in the Osaka World’s Fair - built from NASA photos in tile on a scale of 1:10,000. This technique (photography on tile) would be applied to points of interest in the Florida map.
2. A theatre (seat 100-150) showing the Florida Department of Tourism film or a comparable 8-12 minute show highlighting the beauty and attractions of Florida. This is an excellent film which has been seen by few visitors.

3. A Museum (2,000 s.f.) featuring exhibits and artifacts of sunken and lost treasures in and around Florida.

4. Another Museum (1,000 s.f.) highlighting the history of tourism in Florida. These museums function as something of a pre-show to the amusement part of the theme park.

5. Radio controlled boats (located in the water area around the shop).

6. Children's Play/Recreation Area

7. A large illuminated, electronically operated map of Florida showing visitors what is happening and where.

**INSERT A** here

**Auto Service**

1. High tech gas station containing:
   - A place of augmentation to create a memory with a wash (cheaper and fast)
   - Full service with a smile
   - Many lures, large size
   - Impeccably clean restrooms - like Disney
   - Other distinguishing characteristics yet to be fleshed out.

**Site Amenities**

1. Auto and bus parking - landscaped and landscaped with sequential plantings
2. Signature pylon
3. Entrance statement
4. Site oasis with landscaping and possibly with some topiary treatment
Insect A

The idea of using the Cay and a transport system nearby to develop a two site project with an extension near Rome was discussed but not developed.

Also discussed was the idea of using one of the museums to show an honor role of Florida tourist developers. The project would have been a hall of fame as it were. People like Walt Disney, Mr. Pope, Mr. Busch, George Millay, Mr. Jaworski and Steve Telt and others -- those who have developed the immense tourist of Florida by creating major attractions of quality would be honored.
Section II

Land and Building Areas and Costs and Operational Feasibility

The cigarette group estimated land and building areas and construction costs for all elements of the project as shown in Table 2. Land area on this unit without any allowance for expansion is 11.6 acres. Total construction cost is $21,852,000.

Development cost of the project with and without the themed motel are tentatively estimated as shown in Table 3. With the motel the project totals $29.13 million with a 10% contingency and no land cost. Without the motel the project totals $14.094 million with a 10% contingency and no land cost.

Potential revenue of the project is detailed in Table 4. Operating all elements annually produces revenue of $9,935,000 million. If the gas station and motel are leased out, net revenues are $6,417,000.
## Table 2: Land and Building Areas and Costs

<table>
<thead>
<tr>
<th></th>
<th>Land Area (sq.ft.)</th>
<th>Bldg. Area (sq.ft.)</th>
<th>Unit Cost ($/sq.ft.)</th>
<th>Total Cost ($000)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.0 Food Service</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1 Themed Family</td>
<td>12,000</td>
<td>15,000</td>
<td>$167</td>
<td>$2.563</td>
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<tr>
<td>Restaurant</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>1.2 Citrus Center</td>
<td>1,200</td>
<td>1,000</td>
<td>$90</td>
<td>0.090</td>
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<tr>
<td>1.3 Snack/Deli</td>
<td>600</td>
<td>500</td>
<td>$120</td>
<td>0.060</td>
</tr>
<tr>
<td></td>
<td>11,800</td>
<td>16,500</td>
<td></td>
<td>$2.650</td>
</tr>
<tr>
<td><strong>2.0 Merchandizing</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.1-2.5 Gift/Souvenir</td>
<td>5,000</td>
<td>1,200</td>
<td>$125</td>
<td>0.625</td>
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<tr>
<td>Shops</td>
<td>2,000</td>
<td>60</td>
<td></td>
<td>0.120</td>
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<tr>
<td>2.6 Convenience</td>
<td>1,000</td>
<td>80</td>
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<td>0.080</td>
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<tr>
<td>2.7 Sun Health Ctr</td>
<td>200</td>
<td>65</td>
<td></td>
<td>0.013</td>
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<tr>
<td></td>
<td>9,800</td>
<td>8,200</td>
<td></td>
<td>$0.838</td>
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<tr>
<td><strong>3.0 Hotel</strong></td>
<td></td>
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<tr>
<td>3.1 200 room Hotel</td>
<td>72,000</td>
<td>120,000</td>
<td>$550</td>
<td>$11,000</td>
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<tr>
<td><strong>4.0 Service</strong></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>4.1 Avenue Rest Room</td>
<td>960</td>
<td>1,200</td>
<td>$150</td>
<td>0.120</td>
</tr>
<tr>
<td>4.2/3 In House Res.</td>
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<td></td>
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<tr>
<td>4.3 Promotional Kiosk</td>
<td>960</td>
<td>1,200</td>
<td>$150</td>
<td>0.120</td>
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<tr>
<td>4.4 New Pampal Area</td>
<td></td>
<td></td>
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<tr>
<td>4.5 Banquet</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>4.6 Phone Bank</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$0.150</td>
</tr>
<tr>
<td><strong>5.0 Show</strong></td>
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<td></td>
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<tr>
<td>5.1 Florida Discovery Map</td>
<td>6,200</td>
<td>6,200</td>
<td>$48</td>
<td>$3,000</td>
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<tr>
<td>5.2.1 History of Florida</td>
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<td></td>
<td></td>
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<td>5.2.2 Florida Treasure</td>
<td>2,400</td>
<td>2,000</td>
<td>$300</td>
<td>0.850</td>
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<tr>
<td>5.2.3 Electronic Map</td>
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<td>5.2.4 Toy Boats</td>
<td>5,000</td>
<td>5,000</td>
<td>$250</td>
<td>0.250</td>
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<tr>
<td></td>
<td>9,600</td>
<td>13,400</td>
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<td>$4.150</td>
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<td><strong>6.0 Auto Services</strong></td>
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<tr>
<td>6.1 Station</td>
<td>40,000</td>
<td>3,000</td>
<td>$250</td>
<td>0.250</td>
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<td>6.2 Car Wash</td>
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<td></td>
<td>64,000</td>
<td>6,000</td>
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<td>$0.300</td>
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<tr>
<td><strong>7.0 Site Amenities</strong></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>7.1 Auto/Bus Parking</td>
<td>284,000</td>
<td>2,000</td>
<td>$350</td>
<td>$0.994</td>
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<td>7.2 Segments Pylon</td>
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<td>0.200</td>
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<td>7.3 Entrance Statment</td>
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<td></td>
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<td>0.350</td>
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<tr>
<td>7.4 Landscaping</td>
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<td></td>
<td></td>
<td>$1.444</td>
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<tr>
<td></td>
<td>284,000</td>
<td>2,000</td>
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<td></td>
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<tr>
<td><strong>8.0 Building Common</strong></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8.1 Administration</td>
<td>5,000</td>
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<td>$70</td>
<td>0.350</td>
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<tr>
<td>8.2 Condo Services</td>
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<td></td>
<td></td>
<td>0.480</td>
</tr>
<tr>
<td>8.3 Furniture/Finish</td>
<td>8,000</td>
<td>60</td>
<td></td>
<td>0.150</td>
</tr>
<tr>
<td>8.4 Graphics</td>
<td>15,000</td>
<td></td>
<td></td>
<td>$1.150</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td>356,000</td>
<td></td>
<td>$21,852</td>
<td></td>
</tr>
</tbody>
</table>

Note: Phase I is 200 rooms with indoor pool and 1-2 meeting rooms at 10,000 sq. ft. footprint.
<table>
<thead>
<tr>
<th></th>
<th>With Metal</th>
<th>Without Metal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction Cost</td>
<td>$21,852,000</td>
<td>$10,852,000</td>
</tr>
<tr>
<td>A+E costs</td>
<td>1,147,000</td>
<td>590,000</td>
</tr>
<tr>
<td>Design costs</td>
<td>325,000</td>
<td>325,000</td>
</tr>
<tr>
<td>Intermim Financing</td>
<td>2,622,000</td>
<td>1,302,000</td>
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<tr>
<td>Preoperty Expenses</td>
<td>1,000,000</td>
<td>750,000</td>
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<tr>
<td>Contingency 10%</td>
<td>2,185,000</td>
<td>1,085,000</td>
</tr>
<tr>
<td><strong>total</strong></td>
<td><strong>$29,131,000</strong></td>
<td><strong>$14,094,000</strong></td>
</tr>
<tr>
<td>Rouded Off Exclue of land</td>
<td>$30 Million</td>
<td>$15 Million</td>
</tr>
</tbody>
</table>
**Proposed Project**

Potential Revenues of Project

Restaurant ($9.00 Average Check: $7.50 food and $1.50 beverage). 500,000 covers - $4,500,000
Citrus/ Snack Stand - 1,500 s.f. at $300/ s.f. 450,000
Gifts and Souvenir Stores - 6,000 s.f. at $200/ s.f. 1,200,000
Gas Station. Leased Income - 1,000,000
Motel (60 ground lease): 51,100 room nights at $54.50/ room - 2,785,000

Total Potential Revenue $9,350,000

Net Revenues $6,417,000

Less Gas Station at $100k lease were (2,618,000)
Less Motel at $70k ground lease

Net Revenues $6,417,000
Conclusions drawn from the charrette consensus are highlighted as follows:

* The original design would not be a viable attraction. The market was not as large as estimated, and it would not generate a $14.00 per capita revenue for the development.

* The revised project developed by the charrette group appears to have a sound basic concept. The site is the first rest stop located between the East Coast and Florida, and there seems to be a sufficiently broad and compelling package of services, food and entertainment components to get tourists to stop and local residents to come again and again. The estimated revenues conservatively estimated should be able to make financial sense, and therefore, the project given the estimated costs of construction, reasonable project for economic feasibility are indicated.

* Given the lack of attractions for tourists in Jacksonville, the backing available from the city, the large number of tourists travelling through plus a sizable local resident market, this concept should be viable and ought to be pursued, refined and necessary adjustments made to bring it to market.

- The project described requires specific
  - Examples of tourist stops achieving mass attraction status abound. The project of the experience is to bring that level of execution to Jacksonville, an unserved market area. The architecture employed must a sense of uniqueness and added
  - The design. Showmanship must be outstanding. The place must not look like a tourist stop.
  - The project is geared to local and
    - Tourism but it will serve as a major attraction.

- The project will serve as a major attraction in the local community and will aid that objective.
Considerable time was spent the first day on evaluating given factors in the environment—site availability, competitive attractions and the market place.

Site Requirements and Availability

The size of the site required for the project was estimated as follows:

<table>
<thead>
<tr>
<th>Site Required Per Million Attendance</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Peak month (at 15%)</td>
<td>150,000</td>
</tr>
<tr>
<td>Peak week (divide by 4.43)</td>
<td>33,860</td>
</tr>
<tr>
<td>Peak day (at 20%)</td>
<td>6,772</td>
</tr>
<tr>
<td>Average on site peak for mixed use (30%)</td>
<td>2,032</td>
</tr>
<tr>
<td>Acreage required (at 500/acre)</td>
<td>4.1</td>
</tr>
<tr>
<td>Visitor parking (2,032 divided by 3.2)</td>
<td>635</td>
</tr>
<tr>
<td>Employee parking</td>
<td>150</td>
</tr>
<tr>
<td>Total</td>
<td>785</td>
</tr>
<tr>
<td>Acreage for parking</td>
<td></td>
</tr>
<tr>
<td>Total acreage per million</td>
<td>12.0</td>
</tr>
<tr>
<td>Expansion (50 to 100%)</td>
<td>6-12 acres</td>
</tr>
<tr>
<td>Total site required per million attendance</td>
<td>18-24 acres</td>
</tr>
</tbody>
</table>

Four specific site suggestions were reviewed. Two are close to downtown and two are farther east and south of downtown. One site downtown (4 to 10 acres) across from and north of the convention center was considered to be well located with respect to the Rouse festival market, downtown hotels and related convention activity and the proposed automated skyway. However, as the concept of the project clarified, the charrette group preferred freeway orientation (to I-95 and I-10 proximity and visibility) rather than downtown orientation. Site 4 on McCoy Creek with 20 acres possibly available is considered to be the best of those
discussed. It is under the control of the Jacksonville Transportation Authority. Precise location of the 4 sites discussed is shown in Figure 1.

The group steered away from downtown orientation primarily because the suburbs of tourist visitors available there are relatively small in the total. Rouse will change this somewhat, but this project is best served if located where it can attract attendance from the float of highway visitors in the area both destination and pass through. Location near Rouse with its resident market orientation is less important for a tourist visitor attraction of the kind contemplated than prime access to the freeway systems coupled with the availability of low cost land.

The project cannot sustain an exhorbitant price for land acquisition. In that regard, tax increment financing is available in a district east of I-95. The City can assist in land acquisition in other ways; for example, Rouse is paying $100,000 rent for exceedingly valuable land, a direct subsidy. Revenue bond and/or land leasing may be available to assist the project. Condemnation processes may be available to assist site acquisition.

Until recently, the city fathers and populace had not wanted to be in the tourist business and, hence, had not encouraged or sought tourist related businesses. Recently, however, that attitude has changed dramatically and there is a great deal of interest in and support for such activity. The general infrastructure is in place, although much has to be done to clear and prepare any site chosen. It is believed that the city will assist in every reasonable way.

Additional site search and evaluation will be appropriate in Phase 2 work on the project.
Figure 1
SITE LOCATIONS
Competitive Attractions

The development of attractions in the area is normal with venerable Marine Studies at St. Augustine, the largest draw (reported to be somewhere around the 350,000 mark). St. Augustine has a number of smaller attractions—the old fort and Old House, Ripley's, the Alligator Farm and the Fountain of Youth. The dog races and the beaches are important attractions as are the resort community of Amelia Island, Ponte Vedra and Sawgrass.

In Jacksonville itself, there is an Anheiser-Busch Brewery Tour, a nominal draw, and virtually nothing else worthy of mention—the field is open.

The operating season of the attractions are generally year round, although the bulk of the attendance is in typical tourist seasons. Summer is the high season with a fairly good Christmas and winter season attendance. Admission prices, though not specifically reviewed in the charrette, are presumed to be on the low end.

The Rouse Riverfront Festival Marketplace is scheduled to open in June 1987 with 125,000 square feet. Its economics are predicated on an annual transaction base of some 6 million or more. It will add to the stopover quality of the marketplace even though it will depend primarily for its support on local residents and office workers, destination tourists and business visitors now staying in the market area. Although it is a very positive influence, it is not directly synergistic to Florida Discovery which intends to gain its support from a different crowd—primarily from the large flow of pass-through and family oriented tourism and secondarily from the resident market.
Market Support

Our discussion of the market size/support available to the project yielded these preliminary estimates:

Resident Market Size:
- Primary Market (Duval, St. John and North Clay Counties) 750,000
- Jacksonville ADI 550,000
- Total Resident Market 1,300,000

Tourist Market Sizes (per data compiled by Rouse):
- Auto Visitors to MSA (Duval) 1,200,000
- Air Visitors to MSA (Duval) 700,000
- Jacksonville visitation 1,900,000
- Auto Visitors to St. Johns 950,000
- Visitors to balance of ADI 750,000
- Tourist Visitors to ADI 3,600,000
- Passer-Bys 2,600,000
- Total Potential Market Size 7,500,000

The resident market has a high growth rate with a large immigration fueling growth. The black population is 45 percent in the metro area; 10 percent in the ADI. The passer-by market in the above table is estimated at 5.5 million primarily on I-95 (plus some flow on I-10 and I-75) less the three auto visitor segments tallied above (1,200,000, 700,000 and 950,000) or 2.6 million.

The new 120,000 square foot convention center is projected to add 180,000 room nights or 250,000 visitors to the City within three years--most of it new trade--which will give the visitor growth rate a healthy tone. It was noted that Florida visitation has a high repeat rate (90+ percent) and that half the visitors do not visit attractions. It is also an older crowd, particularly outside of the summer months. We must create an attraction taking that visitor profile into account.

It should be painless to stop at the attraction (i.e., no gate). It should contain some of the noteworthy characteristics
of other successful major highway stops (i.e., great family style restaurants like Nut Tree and Andersen's) and strong identity (the world's most famous bathrooms were discussed as an example of a high visibility device at successful Madonna Inn).

The 1984 median of tourist family income was $32,000, well above the resident average. Median age was 49. The tourist we aim to please has a higher income, is older and better educated than the average of the population.

Accommodations

A substantial number of rooms service the visitor trade, some 13,000 in the Jacksonville ADI (area of dominant interest). Duval County contains approximately 9,000, the Jacksonville CBD, a nominal 1,400 of which 1,000 are designated first class. Most hotels/motels are peripheral and found on I-95 and on the beaches rather than downtown. Downtown had about 3,000 hotel rooms in prior years but many closed. Downtown is presently underdeveloped with regard to quality hotel/motel rooms. However, the CBD hotel fleet will get a substantial infusion of energy with these scheduled openings:

<table>
<thead>
<tr>
<th>Convention Center</th>
<th>October 1986</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rouse</td>
<td>July 1987</td>
</tr>
<tr>
<td>Omni Hotel (350 rooms)</td>
<td>January 1987</td>
</tr>
<tr>
<td>People Mover</td>
<td>January 1988</td>
</tr>
</tbody>
</table>

For Florida Discovery, the best supporting hotel base is located approximately 15 minutes south on I-95 in the neighborhood of Bay Meadows. A hotel capacity of 13,000 rooms will support a large visitor population, which is computed below using the following factors:

Total number of rooms 13,000  
Number per room 2.3  
Average stay 8 days  
Visitors in hotels 70 percent  
Number of days 365  
Occupancy 60 percent
On this basis

Annual visitor volume would be:

\[
\text{Annual Visitors} = \frac{(13,000) (2.3) (365)}{(8) (0.70) (0.60)} \\
= 3,250,000
\]

The above factors are illustrative only but they are reasonable suppositions and balance reasonably well with the prior estimate of 3.6 million tourist visitors.

Weather

Although the flow of tourism is annual business in Florida with only 2 or 3 slow months (October, November, May) the climate in Northern Florida is more stringent than that of Central and Southern Florida. It is a mild winter but too cold for the Southbound Snowbird. The summer is hot and humid and rainy. Weatherization of the project--much of it indoors and the rest heavily protected with covered areas and walkways--will be a necessity. That kind of approach will be essential for year around operation.
Section 3

A RECOMMENDED CONCEPT OF DEVELOPMENT
FOR FLORIDA DISCOVERY

This section treats the content options for Florida Discovery discussed on the second day of the meeting and based on deliberations by the first day. It expresses the charrette consensus concerning feasibility, suitability and sizing for the alternatives discussed.

Development Parameters

The attraction is not a theme park. It is not a static exhibit. It is open all year and weatherized to accomplish that purpose. It is a gateway, hospitality and orientation center and must fulfill these functions. It is an oasis on the trip from the North to the major attractions in Central and Southern Florida. It should appeal to a family tourist trade with an above average concentration of older population during two-thirds of the year.

Major impact must be achieved to make it work. It aims to be the world's best rest stop—like a truck stop only for tourists on vacation.

Most of its elements and most of its trade are geared to a modest stay time 1¼ to 3 hours. Although it can attract an overnight business, it is not a final destination point.

It should be properly priced; it is a good value—not too expensive. It is affordable by large numbers of traveling families.

Products and services are available for user fees on an "a la carte" basis rather than a gate charge.
Recreation, entertainment, food service, shopping and travel services are offered in a pleasant, organized manner reflecting tourist perceptions of Florida as a place in the sun with a lushly landscaped environment. Theming and other devices must be used to establish that this is no ordinary roadside stop. Florida food and merchandise—real or perceived—should be featured.

Although it aims to service a tourist clientele, its products and offerings are good enough to attract the extensive local resident trade.

It is a hospitality center and the training of its staff must reflect that mission—a page from the Disney/Sea World operating approach.

Prototypes

Several operations around the country have developed into mass attraction road stops, many with attendance in the millions. Examples which relate to this purpose are:

**Nut Tree** — themed restaurant and specialty center between Sacramento and the Bay Area drawing over 5 million.

**South of the Border** — a major north-south stop in South Carolina.

**Pea Soup Andersen's** — Andersen's has three operations: one at Solvang between Los Angeles and San Francisco on Highway 10—attendance over 3.5 million; one on Highway 5 also between Los Angeles and San Francisco and one near Oceanside between Los Angeles and San Diego—attendance over 6 million.

**Zenders at Frankenmuth, Michigan** — a German tour stopping point on tourist routes north out of Detroit—drawing over 2.5 million.

It has two main restaurants, Zenders and the Bavarian Inn, entertaining about 1 million diners each per year.
Madonna Inn - a large, extravagantly themed motel midway between Los Angeles and San Francisco, famous for its bathrooms and rococo design.

Harris Ranch - a Mexican hacienda themed rest stop on barren Highway 5 between Los Angeles and points north--attracting well over 2 million.

Peter Pan - a themed restaurant complex in Fredericksburg, Maryland.

Zabors - an attraction complex near Atlantic City.

Hadley's - Banning, California - on the east-west route out of Los Angeles near Palm Springs on Highway 10 (the old 66). It draws over 3 million and features California citrus, dates and other specialty foods.

The above are all successful oasis stops that became mass attractions because they featured some kind of simple quality with a flair. Themed food, merchandise and accommodations service are typical in all of them along with certain recreation elements.

In addition to these stops, several themed restaurant and entertainment centers shed light on approaches that may be applicable in the Jacksonville area. Specifically referenced by the charrette were Casa Bonita in Denver--a highly themed Mexican restaurant drawing over 1.5 million patrons, Billy Bob's in Fort Worth--an entertainment complex of diverse content drawing over a million and Rosie O'Grady's Church Street Station in Orlando--a novel themed specialty entertainment complex.

In these places we find approaches to theme and content that set the place apart and are successful in attracting large visitation from major highway routes. This is the nature of the opportunity in Jacksonville at Florida Discovery.
Specific Content of the Attraction

The charrette group selected the following content elements to create the kind of rest stop impact that is required:

I. Food Service

1. A themed family restaurant heavily related to Florida background. It would have several sections to express different facets of that story material. Like the prototype stops listed above (the Nut Tree, Pea Soup Andersen's, Zenders, Peter Pan, Casa Bonita, Zabors, Harris Ranch) it would stress good value, good tasting, large portions and moderate price in a themed ambience—fish, birds and lush planting on display. Its menu orientation should make a strong statement about the best of Florida. It could contain:
   - fresh fish from the local area
   - Key lime pie
   - Florida fried chicken
   - shrimp and hush puppies
   - catfish and hush puppies
   - conch chowder
   - special breads
   - fresh juice and fruit served at the table—perhaps free of charge
   - an outstanding soup in crock service

2. Citrus center and snack bar/deli themed on citrus industry products. It would be located near the high tech gas station and convenience store for those who want a bite to eat but don't want to stop for 1.5 to 3 hours to eat and play.

II. Merchandising

1. Gift shops
   - 5,000 square feet of gift and souvenir shopping opportunities accenting Florida souvenir selections
   - wearable shop (T-shirts, swim and swimwear, etc.)
   - nicer craft and gift merchandise with emphasis on tropical, marine and Florida products.
   - citrus fruit stand (with shipping capabilities)
   - book shop

2. Convenience store (1,000 square feet) comparable to a first class 7-Eleven Store with emphasis on picnic and snack foods and items that appeal to or are needed by tourists on the road.
III. Accommodations

1. A 200-key themed motel with room for future expansion. The theme was not identified but it could have something to do with the fish, birds, flora and fauna and the waterways of Florida. The motel would have meeting rooms, indoor/outdoor pool and spa.

IV. Services

1. Awesome restrooms, perhaps in the mode or manner of the Madonna Inn, an "attraction" or "experience" in their own right.
2. Phone bank.
4. New resident information center (if sponsored).
5. Tourist information center/reservation referral service.
6. Photo opportunities and services.

V. Show Program

1. Centerpiece of Florida Discovery is a very large map of Florida, a less capital and labor intensified variation of the original concept for the attraction. It is:
   - 250 feet long landscaped map of Florida comprised of grass and shrubery;
   - the map is surrounded by water with electric powered boats in the water, flamingos and other exotic birds;
   - major highways in the state would function as walkways to allow guests to "walk" the entire state;
   - this entire landscaped map would serve as the focal point of the attraction and a view point for the themed restaurant;
   - cities, and maybe other selected areas, could be made of aerial photographs imbedded in ceramic tiles.

Two rough sketches of the "super map" in plain view—as roughed out by Alan Eskew during the charrette are included as Figure 2 for interest and clarification. The map has an indoor/outdoor "feel" or concept that is relatively inexpensive to build. It does not involve expensive audio-animatronics or full exhibit structure and equipment. It can be walked on. It is a simulated tour of Florida in a garden like setting, a mosaic of the state. As shown in Figure 2, it is built in a courtyard surrounded by water setting the state off as it actually is. Random special effects are applicable without heavy cost exhibitry.
A prototype for this installation is the giant map of Japan shown this year in the Tsukuba World's Fair—built from NASA aerial photos in tile on a scale of 1:10,000. This technique (photography on tile) would be applied to points of interest in the Florida map.

2. A theater (seating 100-150) showing the Florida Department of Tourism film or a comparable 8 to 12 minute show highlighting the beauty and attractions of Florida. This is an excellent film which has been seen by few visitors.

3. A museum (2,000 square feet) featuring exhibits and artifacts of sunken and lost treasures in and around Florida.

4. A museum (1,000 square feet) highlighting the history of tourism in Florida. These museums function as something of a pre-show to the restaurant schedule.

5. Radio-controlled boats (located in the water area around the giant map).

6. Children's play/recreation area—1/2 acre McMillan type play area for children, lots of physical, energy releasing kinds of activities/equipment.

7. A large illuminated vertical, electronically operated map of Florida showing visitors what is happening and where.

The idea of using McCoy Creek and a water transport system to develop a two site project with an extension near Rouse was discussed but not developed. Also discussed was the idea of using one of the museums to show an honor role of Florida tourist developers, a hall of fame as it were. The project would honor people like Walt Disney, Mr. Pope, Mr. Busch, George Millay, Mr. Jovanovich and Irvin Feld and others, those who have increased the immense tourism of Florida by creating major attractions of quality.

VI. Auto Service

1. A high tech gas station containing a place of amazement to create a memory such as:
   - a car wash (cheap and fast)
   - full service with a smile
   - many lanes, large size
   - impeccably clean rest rooms—like Disney
   - other distinguishing characteristics yet to be conceived.
VII. Site Amenities

1. Auto and bus parking bermed and landscaped with senior citizen preference.

2. Signature pylon.

3. Entrance statement.

4. Site oasis landscaping possibly with some topiary treatment.
Section 4

LAND AND BUILDING AREAS AND
CONSTRUCTION AND DEVELOPMENT COSTS

The charrette group estimated land and building areas and construction costs for all elements of the project as shown in Table 2. Land area on this cut without any allowance for expansion is 11.6 acres. Total construction cost is $21,852,000.

Development costs of the project with and without the themed motel area tentatively estimated in Table 3. With the motel the project totals $29.13 million with a 10 percent contingency and no land cost. Without the motel the project totals $14.094 million with a 10 percent contingency and no land cost.

Potential revenue of the project is detailed in Table 4. Operating all elements produces annual gross revenue of $9.935 million. If the gas station and motel are leased out, net revenues are $6,417,000.
### Table 2

**LAND AND BUILDING AREAS AND CONSTRUCTION COSTS**

<table>
<thead>
<tr>
<th>Area</th>
<th>Land Area (s.f.)</th>
<th>Building Area (s.f.)</th>
<th>Unit Cost ($ s.f.)</th>
<th>Total Cost ($000)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.0 Food Service</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1 Themed Family</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Restaurant</td>
<td>12,000¹</td>
<td>15,000</td>
<td>$167</td>
<td>$2,500</td>
</tr>
<tr>
<td>1.2 Citrus Center</td>
<td>1,200</td>
<td>1,000</td>
<td>90</td>
<td>0.090</td>
</tr>
<tr>
<td>1.3 Snack/Deli</td>
<td>600</td>
<td>500</td>
<td>120</td>
<td>0.060</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>11,800</td>
<td>16,500</td>
<td></td>
<td>$2,650</td>
</tr>
<tr>
<td><strong>2.0 Merchandising</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.1-2.5 Gift/Souvenir Shops</td>
<td></td>
<td>5,000</td>
<td>125</td>
<td>$0.625</td>
</tr>
<tr>
<td>2.6 Convenience</td>
<td>2,000</td>
<td>1,000</td>
<td>80</td>
<td>0.080</td>
</tr>
<tr>
<td>2.7 Sun Health Ctr.</td>
<td>200</td>
<td>200</td>
<td>65</td>
<td>0.013</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>9,840</td>
<td>8,200</td>
<td></td>
<td>$0.838</td>
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<tr>
<td><strong>3.0 Hotel</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.1 200-Key Motel²</td>
<td>72,000</td>
<td>120,000</td>
<td>$55k/room</td>
<td>$11,000</td>
</tr>
<tr>
<td><strong>4.0 Services</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.1 Awesome restrooms</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>$0.150</td>
</tr>
<tr>
<td>4.2 &amp; 4.3 Info and Reservations</td>
<td>960</td>
<td>800</td>
<td>150</td>
<td>0.120</td>
</tr>
<tr>
<td>4.4 New Resident Info Sponsored</td>
<td></td>
<td></td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>4.5 Banking</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>4.6 Phone Bank</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>0.015</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>---</td>
<td>---</td>
<td></td>
<td>$0.285</td>
</tr>
<tr>
<td><strong>5.0 Show</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.1 Florida Discovery Map</td>
<td>62,000</td>
<td>62,000</td>
<td>$48</td>
<td>$3,000</td>
</tr>
<tr>
<td>5.2.1 History of Tourism</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.2.2 Florida Treasures</td>
<td>2,400</td>
<td>2,000</td>
<td>300</td>
<td>0.850</td>
</tr>
<tr>
<td>5.2.3 Electronic Map</td>
<td>---</td>
<td>---</td>
<td>+$250k</td>
<td></td>
</tr>
<tr>
<td>5.2.4 Toy Boats</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>0.050</td>
</tr>
<tr>
<td>5.3 Mini Play Park</td>
<td>5,000</td>
<td>5,000</td>
<td>---</td>
<td>0.250</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>---</td>
<td>---</td>
<td></td>
<td>$4.150</td>
</tr>
<tr>
<td>Table (continued)</td>
<td>Land Area (s.f.)</td>
<td>Building Area (s.f.)</td>
<td>Unit Cost ($ s.f.)</td>
<td>Total Cost ($000)</td>
</tr>
<tr>
<td>------------------</td>
<td>------------------</td>
<td>---------------------</td>
<td>-------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>6.0 Auto Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.1 Station</td>
<td>40,000</td>
<td>2,000</td>
<td>---</td>
<td>$0.250</td>
</tr>
<tr>
<td>6.2 Car Wash</td>
<td></td>
<td></td>
<td></td>
<td>0.050</td>
</tr>
<tr>
<td>7.0 Site Amenities</td>
<td></td>
<td></td>
<td></td>
<td>$0.300</td>
</tr>
<tr>
<td>7.1 Auto &amp; Bus Parking (700 cars)</td>
<td>284,000</td>
<td>---</td>
<td>$3.50</td>
<td>$0.994</td>
</tr>
<tr>
<td>7.2 Signature Pylon</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>0.200</td>
</tr>
<tr>
<td>7.3 Entrance Statement &amp; Landscaping</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>0.250</td>
</tr>
<tr>
<td>8.0 Building Common Areas</td>
<td></td>
<td></td>
<td></td>
<td>$1.444</td>
</tr>
<tr>
<td>8.1 Administration</td>
<td>---</td>
<td>5,000</td>
<td>$70</td>
<td>$0.350</td>
</tr>
<tr>
<td>8.2 Common Seating &amp; Promenade</td>
<td>---</td>
<td>8,000</td>
<td>$60</td>
<td>0.480</td>
</tr>
<tr>
<td>8.3 Furnishing/Fixtures</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>0.200</td>
</tr>
<tr>
<td>8.4 Graphics</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>0.150</td>
</tr>
<tr>
<td></td>
<td>15,600</td>
<td></td>
<td></td>
<td>$1.180</td>
</tr>
<tr>
<td><strong>GRAND TOTAL</strong></td>
<td><strong>505,600</strong></td>
<td></td>
<td></td>
<td><strong>$21.852</strong></td>
</tr>
<tr>
<td></td>
<td><strong>or 11.6 acres</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. 10,000 square foot footprint.
2. Phase 1 is 200 rooms with indoor pool and 1-2 meeting rooms.
### Table 3

**PROJECT DEVELOPMENT COSTS - FLORIDA DISCOVERY**

<table>
<thead>
<tr>
<th></th>
<th>With Motel</th>
<th>Without Motel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction Cost</td>
<td>$21,852,000</td>
<td>$10,852,000</td>
</tr>
<tr>
<td><strong>A &amp; E Costs</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7% of $16.3 million</td>
<td>1,147,000</td>
<td>590,000</td>
</tr>
<tr>
<td>7 1/4% of $8.1 million</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Design Costs</td>
<td>325,000</td>
<td>325,000</td>
</tr>
<tr>
<td>Interim Financing</td>
<td>2,622,000</td>
<td>1,302,000</td>
</tr>
<tr>
<td>Pre-opening Expenses</td>
<td>1,000,000</td>
<td>750,000</td>
</tr>
<tr>
<td><strong>Contingency - 10 percent</strong></td>
<td>$2,185,000</td>
<td>$1,085,000</td>
</tr>
<tr>
<td><strong>Rounded Off Total</strong></td>
<td><strong>$29,131,000</strong></td>
<td><strong>$14,094,000</strong></td>
</tr>
<tr>
<td>Exclusive of Land</td>
<td>$30,000,000</td>
<td>$15,000,000</td>
</tr>
</tbody>
</table>
Table 4

POTENTIAL GROSS AND NET REVENUES
OF THE PROPOSED PROJECT

<table>
<thead>
<tr>
<th>Description</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurant (9.00 average check: $7.50 food and $1.50 beverage) 500,000 covers -</td>
<td>$4,500,000</td>
</tr>
<tr>
<td>Citrus/Snack Stand - 1,500 s.f. at $300/s.f.</td>
<td>450,000</td>
</tr>
<tr>
<td>Gifts and Souvenir Stores - 6,000 s.f. at $200/s.f.</td>
<td>1,200,000</td>
</tr>
<tr>
<td>Gas Station</td>
<td>1,000,000</td>
</tr>
<tr>
<td>Motel - 51,100 room nights at $54.50/room</td>
<td>2,785,000</td>
</tr>
</tbody>
</table>

Total Potential Revenue: $9,935,000

Less Gas Station at $100k lease income: ($900,000)
Less Motel at 6 percent ground lease: (2,618,000)

Net Revenues: $6,417,000
Section 5

CONCLUSIONS DRAWN FROM THE CHARRETTE

Consensus are highlighted as follows:

- The original design would not be a viable attraction. The market is not as large as estimated. Pro forma attendance is not attainable and it would not generate a $14.00 per capita expenditure. The cost of the development is excessive for its revenue generating capability.

- The revised project developed by the charrette group appears to have achieved a required balance and a sound basic concept. It would be the world's first major rest stop in Florida located between the East Coast and Florida's attractions center. A sufficiently broad and compelling package of services, food and entertainment components to get tourists to stop and local residents to come again and again appears to have been developed. The estimated revenues (very conservatively estimated) should be able to make financial sense. Given the estimated costs of construction, reasonable prospects for economic feasibility are indicated.

- Given the lack of attractions for tourists in Jacksonville, the backing available from the city, the large number of tourists travelling through the area plus a sizable local resident market, this concept should be viable and ought to be pursued, refined and necessary adjustments made to bring it to market.

- The project described requires skill in execution and operation but examples of tourist stops successfully achieving mass attraction status abound. The point of
the exercise is to bring that kind of execution to Jacksonville, an unserviced market area. The architecture employed must express a sense of wholeness and avoid the ersatz. Showmanship must be outstanding. The place must not look like a tourist joint.

The project is geared to local tourism but it will benefit greatly from acceptance by the resident market. Many major prototype attractions discussed herein do outstandingly well in the resident trade. Special promotions in the local community will aid that objective.