1-27-1989

Summary Memorandum: Conceptual Approach to Near Term Development Opportunities at Universal City

Harrison Price Company

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Charrette Conference

DEVELOPMENT POTENTIALS FOR
FLORIDA DISCOVERY IN
JACKSONVILLE, FLORIDA

October 21-22, 1985

Prepared by:

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876 South Bronson Avenue
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(213) 937-3457
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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/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, 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 writeup that follows attempts 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 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            |       |
| 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 Attractions

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-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 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 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.
**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 viewpoint for the themed restaurant;
   - cities, and maybe other selected areas, could be made of aerial photographs embedded 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
Figure 2
SUPER MAP ROUGH SKETCHES
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>Table 2</th>
<th>LAND AND BUILDING AREAS AND CONSTRUCTION COSTS</th>
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<tbody>
<tr>
<td></td>
<td>Land Area (s.f.)</td>
</tr>
<tr>
<td>1.0 Food Service</td>
<td></td>
</tr>
<tr>
<td>1.1 Themed Family</td>
<td></td>
</tr>
<tr>
<td>Restaurant</td>
<td>12,000</td>
</tr>
<tr>
<td>1.2 Citrus Center</td>
<td>1,200</td>
</tr>
<tr>
<td>1.3 Snack/Deli</td>
<td>600</td>
</tr>
<tr>
<td></td>
<td>11,800</td>
</tr>
<tr>
<td>2.0 Merchandising</td>
<td></td>
</tr>
<tr>
<td>2.1-2.5 Gift/Souvenir Shops</td>
<td>5,000</td>
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<tr>
<td>2.6 Convenience</td>
<td>1,000</td>
</tr>
<tr>
<td>2.7 Sun Health Ctr.</td>
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</tr>
<tr>
<td></td>
<td>9,840</td>
</tr>
<tr>
<td>3.0 Hotel</td>
<td></td>
</tr>
<tr>
<td>3.1 200-Key Motel</td>
<td>72,000</td>
</tr>
<tr>
<td>4.0 Services</td>
<td></td>
</tr>
<tr>
<td>4.1 Awesome restrooms</td>
<td></td>
</tr>
<tr>
<td>4.2 &amp; 4.3 Info and Reservations</td>
<td>960</td>
</tr>
<tr>
<td>4.3 Promotional kiosks</td>
<td></td>
</tr>
<tr>
<td>4.4 New Resident Info Sponsored</td>
<td></td>
</tr>
<tr>
<td>4.5 Banking</td>
<td></td>
</tr>
<tr>
<td>4.6 Phone Bank</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>5.0 Show</td>
<td></td>
</tr>
<tr>
<td>5.1 Florida Discovery Map</td>
<td>62,000</td>
</tr>
<tr>
<td>5.2.1 History of Tourism</td>
<td></td>
</tr>
<tr>
<td>5.2.2 Florida Treasures</td>
<td>2,400</td>
</tr>
<tr>
<td>5.2.3 Electronic Map</td>
<td></td>
</tr>
<tr>
<td>5.2.4 Toy Boats</td>
<td></td>
</tr>
<tr>
<td>5.3 Mini Play Park</td>
<td>5,000</td>
</tr>
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<td></td>
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</table>

-22-
<table>
<thead>
<tr>
<th>Section</th>
<th>Description</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>
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<tbody>
<tr>
<td>6.0</td>
<td>Auto Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.1</td>
<td>Station</td>
<td>40,000</td>
<td>2,000</td>
<td></td>
<td>0.250</td>
</tr>
<tr>
<td>6.2</td>
<td>Car Wash</td>
<td></td>
<td></td>
<td></td>
<td>0.050</td>
</tr>
<tr>
<td>7.0</td>
<td>Site Amenities</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.1</td>
<td>Auto &amp; Bus Parking (700 cars)</td>
<td>284,000</td>
<td></td>
<td></td>
<td>0.994</td>
</tr>
<tr>
<td>7.2</td>
<td>Signature Pylon</td>
<td>---</td>
<td></td>
<td>$3.50</td>
<td>0.200</td>
</tr>
<tr>
<td>7.3</td>
<td>Entrance Statement &amp; Landscaping</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>0.250</td>
</tr>
<tr>
<td>8.0</td>
<td>Building Common Areas</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8.1</td>
<td>Administration</td>
<td>---</td>
<td>5,000</td>
<td>$70</td>
<td>0.350</td>
</tr>
<tr>
<td>8.2</td>
<td>Common Seating &amp; Promenade</td>
<td>---</td>
<td>8,000</td>
<td>$60</td>
<td>0.480</td>
</tr>
<tr>
<td>8.3</td>
<td>Furnishing/Fixtures</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>0.200</td>
</tr>
<tr>
<td>8.4</td>
<td>Graphics</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>0.150</td>
</tr>
<tr>
<td></td>
<td><strong>Total</strong></td>
<td><strong>15,600</strong></td>
<td></td>
<td></td>
<td>$1.180</td>
</tr>
<tr>
<td></td>
<td><strong>GRAND TOTAL</strong></td>
<td><strong>505,600</strong></td>
<td></td>
<td><strong>$21,852</strong></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 Exclusive</td>
<td>$30,000,000</td>
<td>$15,000,000</td>
</tr>
<tr>
<td>of Land</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Table 4

**POTENTIAL GROSS AND NET REVENUES OF THE PROPOSED PROJECT**

<table>
<thead>
<tr>
<th>Service</th>
<th>Revenue (in $)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurant ($9.00 average check:</td>
<td>$4,500,000</td>
</tr>
<tr>
<td>$7.50 food and $1.50 beverage)</td>
<td></td>
</tr>
<tr>
<td>500,000 covers</td>
<td></td>
</tr>
<tr>
<td>Citrus/Snack Stand -</td>
<td>450,000</td>
</tr>
<tr>
<td>1,500 s.f. at $300/s.f.</td>
<td></td>
</tr>
<tr>
<td>Gifts and Souvenir Stores -</td>
<td>1,200,000</td>
</tr>
<tr>
<td>6,000 s.f. at $200/s.f.</td>
<td></td>
</tr>
<tr>
<td>Gas Station</td>
<td>1,000,000</td>
</tr>
<tr>
<td>Motel - 51,100 room nights -</td>
<td>2,785,000</td>
</tr>
<tr>
<td>at $54.50/room</td>
<td></td>
</tr>
<tr>
<td>Total Potential Revenue</td>
<td>$9,935,000</td>
</tr>
<tr>
<td>Less Gas Station at $100k lease income</td>
<td>($900,000)</td>
</tr>
<tr>
<td>Less Motel at 6 percent ground lease</td>
<td>(2,618,000)</td>
</tr>
<tr>
<td>Net Revenues</td>
<td>$6,417,000</td>
</tr>
</tbody>
</table>
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 Dairy in Jacksonville, Florida

October 21 - 22, 1985

Prepared by:
HARRISON PRICE COMPANY
368 S. Bonneville
Los Angeles, California 90015
213-937-3457
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Section I
INTRODUCTION

Hanson 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 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 tourism 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 "promised 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 steps of detailed feasibility analysis, schematic development, financing, and subsequent implementation.
Participants were selected for the range and quality of their and their background in the Florida attractions experience. James White, President of the Space Needle Corporation, has an extensive background in attraction management at Six Flags and the Space Needle. Grady Harline is a successful independent attraction designer with extensive experience in the amusement park field—particularly at Busch Gardens. Alan Eshoo 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 Willem Cans and is a principal in a very successful design practice at Design and Production, concentrating on exposition exhibits, visitor centers and related attractions. Nick Wilmot (who was former based in several years)
Table 1

LIST OF PARTICIPANTS

Janice Knutten
James L. White III
Don Evans
Carol
Thomas Mobley, Consultant
T. McLeod, Mayor
Florida Discovery & The City of Jacksonville

Harry L. William Jr
Develop & Productions, Inc.

Terry Larkin
Terry Larkin Associates

R. Allen Eskew
Eskew, Vogt, Salato & Felson

Hannan A. Price
Nicholas S. Winslow
Hannan Price Company
and various Price between them has an extensive background in economic planning and feasibility analysis for a wide range of attractions. As head of Paramount's Future General, Wimbot has specific background in filmic and other high technology approaches to the attractions industry.

The group assembled at the station at St. John's Place for the two days October 21st and 22th 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
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 units 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 final concept, the positioning of the opportunity and the general outline of themes and content.
Section II
The Project Environment

Consistent with how the study was spent evaluating the given factors in the environment - site availability, competitive attractiveness and the market place.

Site Requirements and Availability

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

Site Required Per Million Attendance

- **Peak Month (at 15%)**: 150,000
- **Peak Week (Divide by 4.13)**: 33,860
- **Peak Day (at 20%)**: 6,772
- **Average on Site Peak for Museum (30%)**: 2032

- **Acreage required (at 500/acre)**: 4.1
- **Visitor Parking**: 2032 / 3.2 = 635
- **Employer Parking**: 150 / 785

- **Acreage for parking**: 7.9
- **Total Acreage Per Million**: 12.0
- **Expansion (50% to 100%)**: 6 - 12.0
- **Total Site Required Per Million Attendance**: 18 - 24 acre

- The site required is determined in two parts: downtown and two (2) miles of downtown. One site downtown accurate for the convention center and be well located with respect to the Trade Center, bus and automobile activity, and the proposed automated Clay Street tunnel. The other downtown site is approximately one mile off the auto highway, 1 mile off the interstate, with 90% on-site parking, but not provided for.username. The other downtown site is approximately one mile off the auto highway, 1 mile off the interstate, with 90% on-site parking, but not provided for.
The group steered away from downtown revitalizing because the number of downtown retail centers was small. But this project is best suited where it can attract attendance from the flow of highway visitors in the area.

Both destination and pass-through tourist would be interested in a tourist-related attraction of the kind contemplated and more important than from access to the freeway system. The project cannot sustain an exorbitant price for land acquisition. In that regard tax increment financing is available in a distinct East of 1-95. The city can assist in land acquisition in other ways, for example, if the city is paying $100,000 rent for land value it would subsidize. Revenue bond and a land lending may be available to assist the project. Condemnation process 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 tourism related businesses. The general infrastructure is in place, although much more to be done to clear and prepare the site chosen. It appears that the city 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 yearly mark). St. Augustine has many large attractions - the St. Augustine Alligator Farm and the beaches are important attractions. In Jacksonville itself, there is an Archeder - Bush Breezy Tour - a nominal draw and virtually nothing worthy of mention - the fields are 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 charette, will be on the low end.

The Jax Riverfront Festival Marketplace is scheduled to open in June 1987. At 125,000 square feet it is 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 from local residents and destination shopping and visitors. It will not be directly synergistic to Florida Deacness, which intends to gain its support from a different source, from the flow of people through fast-growing and secondary markets 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 3,800,000
- Passer-By 2,600,000
- Total Potential Market Size 7,500,000

The resident market has a high growth rate with a large immigration fostering growth. The slow rate of population is 1.0% in the metro area.

The pass by market is estimated at 5.5 million annually (1-95 plus auto in 2-10 and 1-75) plus the three auto visitor segments talked about (1.200,000, 700,000, and 950,000) or 2.6 million.

The new convention center is projected to add 500,000 room nights of 250,000 square feet. The city is mostly new hotel which will give the resident growth rate a healthy tone.
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 used at Anderson's and strong identity (the world's most famous bathrooms of a high visibility device as an example, successful Madonna Inn).

The 1984 median of tourist family income was $32,000 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 serve the business trade, some 13,000 in the Jacksonville
Area of direct interest. Duval County contains approximately 9,000, the Jacksonville CBD, a normal
14,000 of which 10,000 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 just a few years ago but many closed
because of their overall deteriorating quality. Downtown
is presently underdeveloped with regard to quality
hotel/motel rooms.

N.B. However

The CBD hotel fleet
will get a shot in the arm
with these scheduled openings:

- Convention Center
- 10/86
- 1-95

- Ponce De Leon
- 7/87
- Omni Hotel (350 rooms)
- 1/87
- People Mover
- 1/88

For Florida DeCrey, 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. The following factors:

Total No. of Rooms (13,000) 13,000
Number Per Room (2.3) 2.3
Average Stay (8 days) 8
Visitors in Hotels (90%) 0.9
Number of Days (365) 365
Occupancy (60%) 0.6

Annual visitor volume would be:

\[
\text{Annual Visitors} = \frac{13000 \times 2.3 \times 365}{8 \times 0.9 \times 0.60}
\]

\[
= 3,250,000
\]

The above factors, which are illustrative only but they are reasonable suggestions and balance well with the official 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 agreeable than that of Central Florida.

It is considerably cooler in the winter for the southerly wind bath.

The atmosphere is drier and boundaries and scenery much at fit
indoors, and the rest evenly 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 Channelle 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 for the trip from the North to the major attraction in central and southern Florida. It should appeal to a family tourist trade with a concentration of older and during 2/3 of the year.

Major impact must be achieved to make it work, always to be like a truck stop only for tourists on vacation.
Most of its elements are geared to a modest stay time 1½ to 3 hours. Although it can attract an overnight binge, it is not a final destination point.

It should be popularly 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 "à 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 Sun with a lushly landscaped environment. Themed 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 product and offerings must be good enough to attract the extensive local resident trade.

It is a hospitality center and the training of its staff must reflect that mindset - 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:

- Nut Tree, between Sacramento and the Bay Area, drawing over 5 million.
- South of the Border (a major stop in South Carolina).
- Pea Soup Anderson's, at Solvang between LA and San Francisco, attendance over 3½ million.
- On Highway 5 also between LA and San Francisco and one near Oceanside between LA and San Diego, attendance over 6 million.

- Jenglas at Frankenmuth, Michigan, (a stopping point on transit routes north out of Detroit) attending 2½ million.

- Madonna Inn - a large themed motel midway between LA and San Francisco, famous for its bathrooms and rococo design.
- Harris Ranch - a Mexican-themed rest stop on Interstate Highway 5 between LA and points north, attracting well over 2 million.
- Peter Pan - a themed restaurant complex in Frederick, Md.
- Zabors - an attraction complex near Atlantic City.

Hodges in Basalt, Co.

Maury 16 on the East West Route out of LA - near Palm Springs - on December 3rd features 3 million eggs.
The above age all successful
basis stops that became mass
attractions because they featured
some kind of simple quality with a
plain food, merchandising, and accommodations
service are typical in all of them along with certain elements.
In addition to these stops several
themed restaurant and entertainment
centers shed light on the
area. Specifically,
reference to 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 Church Street Station and
Rosie O’Grady’s in Orlando - a novel
themed specialty entertainment complex
in Orlando.

In these places we find attractions
approaches. We are looking for concepts
that will give the notoriety and
impact that it requires at the area to an
elaborate them. And we are attempting to visualize ideas
for theme of Florida Discovery that for
reasons will stop 1/2 million 1
million people.

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

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

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 Ambrosia, Zedlers, Peter Pan, Casa Bruta, Zibros, Bami Ranch) it would stress good value, good tasting large portions, great value, and moderate price with a travel ambiance - fish, birds and lush planting on display.

Its menu orientation should underscore 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 juice and fruit served at the table - perhaps free
- An outstanding soup in a crock server
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 1½ 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, souvenirs and sundries etc.)
   - Gift shop (nice, craft and gift, with emphasis on tropical, marine and Florida products)
   - Citrus fruit stand (with slicing capabilities)

2. Convenience Store (over 5000 sq ft) comparable to a first-class 7-11 store with emphasis on premium and snack foods and items that appeal to be 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 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 rides
4. New resident information center (if sponsored)
5. Tourist information center/reservation referral service
6. Photo opportunities and services

IV Show Program

1. Centerpiece of Florida Discovery is a large, scale map of Florida, manifestation 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 cities, and maybe other selected areas, could be made of aerial photographs imbedded in ceramic tiles.

Rough "blueprints" sketches of the "map" view - as roughed out. The "chateau" are included as Figure 2 for interest and sanitation.
The map had an indoor/outdoor "feel" or concept that is relatively inexpensive to build. It does not involve expensive audio-animatronics or full exhibit and equipment. It can be walked on.

It is a simulated tour of Florida in a garden setting, among its streams and fountains, built in a courtyard surrounded by water setting the state off as it actually is. Random special effects are applicable without heavy cost expenditure.

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

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

Museum (1,000 s.f.) highlighting the history of tourism in Florida. These museums function as something of a pre-show to the main event.

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

Children's Play/Recreation Area
1/2 acre McMillian type play area for children
lots of physical, energy releasing kinds of activities/

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

Insert A here

Auto Service

A high tech gas station

- Full service with a smile

- Many cases, large size

- Impeccably clean rest rooms - like Disney

- Other distinguishing characteristics

Yet to be fleshed out.

Site Amenities

1. Auto and bus parking - Bermed and landscaped with sequoia type perennial

2. Signature pylon

3. Entrance statement

4. Site oasis landscaping possibly with some topiary treatment.
Insert A

The idea of using the city and transportation system 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 system of Florida tourist development. The project would have been a hall of fame as it were. People like Walt Disney, Mr. Pope, Mr. Bunch, George Millay, Mr. Javansky, and Summit felt — and others — that those who have developed the immense tourist of Florida by the attractions of quality would be honored.
Section IV
Land and Building Area and Costs
and Funded Capital Feasibility

The consultant 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 attorney’s 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 annual gross produces 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 Costs

<table>
<thead>
<tr>
<th>Category</th>
<th>Land Area (sq. ft.)</th>
<th>Bldg. Area (sq. ft.)</th>
<th>Unit Cost ($/sq. ft.)</th>
<th>Total Cost ($000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0 Food Service</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1 Themed Family</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Restaurant</td>
<td>12,000</td>
<td>15,000</td>
<td>167</td>
<td>2.50</td>
</tr>
<tr>
<td>1.2 Citrus Center</td>
<td>1,200</td>
<td>1,000</td>
<td>90</td>
<td>0.090</td>
</tr>
<tr>
<td>1.3 Snack/Deli</td>
<td>600</td>
<td>500</td>
<td>120</td>
<td>0.060</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>11,800</td>
<td>16,500</td>
<td><strong>$ 2.650</strong></td>
<td></td>
</tr>
<tr>
<td>2.0 Merchandizing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.1-2.5 Gift/Sou. Shops</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.6 Convenience</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.7 Sun Health Ctr</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>9,810</td>
<td>8,200</td>
<td><strong>$ 5.838</strong></td>
<td></td>
</tr>
<tr>
<td>3.0 Hotel</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.1 200-key Hotel</td>
<td>72,000</td>
<td>120,000</td>
<td>$55K/Bom</td>
<td>11,000</td>
</tr>
<tr>
<td>4.0 Service</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.1 Avenue Rest.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.2/3 In-pit Res.</td>
<td>960</td>
<td>800</td>
<td>150</td>
<td>0.120</td>
</tr>
<tr>
<td>4.3 Promotional Kiosk</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.4 New Resident Info.</td>
<td>Sponsored</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.5 Banking</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.6 Phone Bank</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td><strong>$ 0.55</strong></td>
<td></td>
</tr>
<tr>
<td>5.0 Show</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.1 Florida Discovery</td>
<td>6,200</td>
<td>62,000</td>
<td>48</td>
<td>3.60</td>
</tr>
<tr>
<td>5.2.1 History of Tampa</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.2.2 Florida Treasure</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></td>
<td></td>
</tr>
<tr>
<td>5.2.4 Tory Boats</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.3 Mini Play Park</td>
<td>5,000</td>
<td>5,000</td>
<td>250</td>
<td>0.250</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>6,200</td>
<td>62,000</td>
<td><strong>$ 4.150</strong></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>250</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>Total</strong></td>
<td>6,600</td>
<td>2,000</td>
<td><strong>$ 0.300</strong></td>
<td></td>
</tr>
<tr>
<td>7.0 Site Amenities</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.1 Auto &amp; Bus Parking</td>
<td>284,000</td>
<td>100,000</td>
<td>350</td>
<td>0.994</td>
</tr>
<tr>
<td>7.2 Signature Pylon</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.3 Entrance Stat + Landscaping</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>284,000</td>
<td>100,000</td>
<td><strong>$ 0.994</strong></td>
<td></td>
</tr>
<tr>
<td>8.0 Building Common Areas</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8.1 Administration</td>
<td>5,000</td>
<td>5,000</td>
<td>70</td>
<td>0.350</td>
</tr>
<tr>
<td>8.2 Gymnasium + Equipment</td>
<td>8,000</td>
<td>500</td>
<td>60</td>
<td>0.480</td>
</tr>
<tr>
<td>8.3 Furniture/Fixtures</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8.4 Graphics</td>
<td>15,000</td>
<td></td>
<td>100</td>
<td>1.500</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>15,000</td>
<td></td>
<td><strong>$ 1.850</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td>205,600</td>
<td></td>
<td><strong>$ 21,852</strong></td>
<td></td>
</tr>
</tbody>
</table>

21 Phase I: 200 rooms with indoor pool and 1-2 meeting rooms
e 10,000 sq. ft. footprint
### Table 3

<table>
<thead>
<tr>
<th></th>
<th>With Metal</th>
<th>Without Metal</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Construction Cost</strong></td>
<td>$21,852,000</td>
<td>$10,852,000</td>
</tr>
<tr>
<td><strong>A+E Costs</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$770,000</td>
<td>$16.3 MM</td>
<td>$1,147,000</td>
</tr>
<tr>
<td>$740,000</td>
<td>$8.1 MM</td>
<td>$590,000</td>
</tr>
<tr>
<td><strong>Design Costs</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>325,000</td>
<td>325,000</td>
</tr>
<tr>
<td><strong>Interim Financing</strong></td>
<td>2,622,000</td>
<td>1,302,000</td>
</tr>
<tr>
<td><strong>Permits Expenses</strong></td>
<td>1,000,000</td>
<td>750,000</td>
</tr>
<tr>
<td><strong>Contingency 10%</strong></td>
<td>2,185,000</td>
<td>1,085,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$29,131,000</td>
<td>$14,094,000</td>
</tr>
<tr>
<td><strong>Rounded off Excl. of land</strong></td>
<td>$30 Million</td>
<td>$15 Million</td>
</tr>
</tbody>
</table>
## Proposed Project

### Potential Revenues

<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)</td>
<td>$4,500,000</td>
</tr>
<tr>
<td>500,000 covers</td>
<td></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: Leased income</td>
<td>1,000,000</td>
</tr>
<tr>
<td>Motel (60-year ground lease): 51,100 room nights at $54.50/room</td>
<td>2,785,000</td>
</tr>
<tr>
<td><strong>Total Potential Revenue</strong></td>
<td><strong>$9,385,000</strong></td>
</tr>
</tbody>
</table>

Net Revenues: $6,147,000

Less Gas Station at $100,000 lease = ($900,000)

Less Motel at 6% ground lease = (2,678,000)

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 incentive for its revenue-generating capability.

* The revised project developed by the charrette group seems to have a sound basic concept. World's first rest stop located between the East Coast and Florida there seems to be a sufficient 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, based on 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 shell in execution and operation that correct examples of transit stops achieving mass attraction status abound. A point of the exercise is to bring that level of execution to Jacksonville, an unserved market area. The architecture employed must a sense of purpose and whereby the essence. Showmanship must be outstanding. The place must look like a transit stop.

- The project is geared to local tourism and is tightly linked from the resident market. Most major attractions discussed herein do outstandingly well in the resident trade. Special promotions in the local community would aid that objective.
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>
</tbody>
</table>

Acreage required (at 500/acre) 4.1

Visitor parking (2,032 divided by 3.2) 635
Employee parking 150
Total 785

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 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 exorbitant 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 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 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:

<table>
<thead>
<tr>
<th>Resident Market Size:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Market (Duval, St. John and North Clay Counties)</td>
<td>750,000</td>
</tr>
<tr>
<td>Jacksonville ADI</td>
<td>550,000</td>
</tr>
<tr>
<td><strong>Total Resident Market</strong></td>
<td><strong>1,300,000</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tourist Market Sizes (per data compiled by Rouse):</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto Visitors to MSA (Duval)</td>
<td>1,200,000</td>
</tr>
<tr>
<td>Air Visitors to MSA (Duval)</td>
<td>700,000</td>
</tr>
<tr>
<td>Jacksonville visitation</td>
<td>1,900,000</td>
</tr>
<tr>
<td>Auto Visitors to St. Johns</td>
<td>950,000</td>
</tr>
<tr>
<td>Visitors to balance of ADI</td>
<td>750,000</td>
</tr>
<tr>
<td>Tourist Visitors to ADI</td>
<td>3,600,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Passer-Bys</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Potential Market Size</strong></td>
<td><strong>7,500,000</strong></td>
</tr>
</tbody>
</table>

The resident market has a high growth rate with a large immigration fueling growth. The black population is 10 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>November 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>2.3</td>
</tr>
<tr>
<td>Average stay</td>
<td>8 days</td>
</tr>
<tr>
<td>Visitors in hotels</td>
<td>70 percent</td>
</tr>
<tr>
<td>Number of days</td>
<td>365</td>
</tr>
<tr>
<td>Occupancy</td>
<td>60 percent</td>
</tr>
</tbody>
</table>
Annual visitor volume would be:

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 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 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.

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 rococco 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 restuarant 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
   - Keylime pie
   - Florida fried chicken
   - shrimp and hugh 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 viewpoint 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.

-18-
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 $6,417,000.
<table>
<thead>
<tr>
<th></th>
<th>Land Area (s.f.)</th>
<th>Building Area (s.f.)</th>
<th>Unit Cost ($/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>
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<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>
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<td></td>
<td>11,800</td>
<td>16,500</td>
<td></td>
<td>$2.650</td>
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<tr>
<td>2.0 Merchandising</td>
<td></td>
<td></td>
<td></td>
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<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>
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<tr>
<td>2.6 Convenience</td>
<td>1,000</td>
<td>80</td>
<td>65</td>
<td>0.013</td>
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<td>2.7 Sun Health Ctr.</td>
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<tr>
<td></td>
<td>9,840</td>
<td>8,200</td>
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<td>$0.838</td>
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<tr>
<td>3.0 Hotel</td>
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<tr>
<td>3.1 200-Key Motel</td>
<td>72,000</td>
<td>120,000</td>
<td>$55k/room</td>
<td>$11,000</td>
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<tr>
<td>4.0 Services</td>
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<tr>
<td>4.1 Awesome restrooms</td>
<td>---</td>
<td>---</td>
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<td>$0.150</td>
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<tr>
<td>4.2 &amp; 4.3 Info and Reservations</td>
<td>960</td>
<td>800</td>
<td>$150</td>
<td>0.120</td>
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<tr>
<td>4.3 Promotional kiosks</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>4.4 New Resident Info Sponsored</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>4.5 Banking</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>4.6 Phone Bank</td>
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<td>$0.285</td>
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<td>5.0 Show</td>
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<td>5.1 Florida Discovery Map</td>
<td>62,000</td>
<td>62,000</td>
<td>$48</td>
<td>$3.000</td>
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<tr>
<td>5.2.1 History of Tourism</td>
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<tr>
<td>5.2.2 Florida Treasures</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>
<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>
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<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>$4.150</td>
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<tr>
<td>Table (continued)</td>
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<tr>
<td>---------------------------------------------------------------------------------</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Land Area (s.f.)</strong></td>
<td><strong>Building Area (s.f.)</strong></td>
<td><strong>Unit Cost ($ s.f.)</strong></td>
<td><strong>Total Cost ($000)</strong></td>
<td></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>$0.250</td>
<td></td>
</tr>
<tr>
<td>6.2 Car Wash</td>
<td></td>
<td></td>
<td>$0.050</td>
<td></td>
</tr>
<tr>
<td>7.0 Site Amenities</td>
<td></td>
<td></td>
<td>$0.300</td>
<td></td>
</tr>
<tr>
<td>7.1 Auto &amp; Bus Parking (700 cars)</td>
<td>284,000</td>
<td>---</td>
<td>$3.50</td>
<td></td>
</tr>
<tr>
<td>7.2 Signature Pylon</td>
<td>---</td>
<td>---</td>
<td>$0.200</td>
<td></td>
</tr>
<tr>
<td>7.3 Entrance Statement &amp; Landscaping</td>
<td>---</td>
<td>---</td>
<td>$0.250</td>
<td></td>
</tr>
<tr>
<td>8.0 Building Common Areas</td>
<td></td>
<td></td>
<td>$1.444</td>
<td></td>
</tr>
<tr>
<td>8.1 Administration</td>
<td>---</td>
<td>5,000</td>
<td>$70</td>
<td></td>
</tr>
<tr>
<td>8.2 Common Seating &amp; Promenade</td>
<td>---</td>
<td>8,000</td>
<td>$60</td>
<td></td>
</tr>
<tr>
<td>8.3 Furnishing/Fixtures</td>
<td>---</td>
<td>---</td>
<td>$0.200</td>
<td></td>
</tr>
<tr>
<td>8.4 Graphics</td>
<td>---</td>
<td>---</td>
<td>$0.150</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>15,600</strong></td>
<td><strong>$1.180</strong></td>
</tr>
<tr>
<td><strong>GRAND TOTAL</strong></td>
<td>505,600</td>
<td><strong>or 11.6 acres</strong></td>
<td><strong>$21.852</strong></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><strong>2,185,000</strong></td>
<td><strong>1,085,000</strong></td>
</tr>
<tr>
<td>Rounded Off Total</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>Area</th>
<th>Potential Gross Revenue</th>
<th>Net Revenues</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>
<td></td>
</tr>
<tr>
<td>Citrus/Snack Stand - 1,500 s.f. at $300/s.f.</td>
<td></td>
<td>450,000</td>
</tr>
<tr>
<td>Gifts and Souvenir Stores - 6,000 s.f. at $200/s.f.</td>
<td></td>
<td>1,200,000</td>
</tr>
<tr>
<td>Gas Station</td>
<td></td>
<td>1,000,000</td>
</tr>
<tr>
<td>Motel - 51,100 room nights at $54.50/room</td>
<td></td>
<td>2,785,000</td>
</tr>
<tr>
<td>Total Potential Revenue</td>
<td></td>
<td>$9,935,000</td>
</tr>
<tr>
<td>Less Gas Station at $100k lease income</td>
<td>($900,000)</td>
<td></td>
</tr>
<tr>
<td>Less Motel at 6 percent ground lease</td>
<td>(2,618,000)</td>
<td></td>
</tr>
<tr>
<td>Net Revenues</td>
<td></td>
<td>$6,417,000</td>
</tr>
</tbody>
</table>
Conclusions are highlighted as follows:

0 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.

0 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.

0 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.

0 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.