Charrette Conference, Development Potentials for Florida Discovery in Jacksonville, Florida

12-10-1985

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Final Edition
December 10, 1985

Charrette Conference

DEVELOPMENT POTENTIALS FOR
FLORIDA DISCOVERY IN
JACKSONVILLE, FLORIDA

October 21-22, 1985

Prepared by:

Harrison Price Company
876 South Bronson Avenue
Los Angeles, California 90005

(213) 937-3457
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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.

-5-
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>
</tbody>
</table>

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 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

- 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:

| Total number of rooms | 13,000 |
| Number per room       | 2.5    |
| Average stay          | 6 days |
| Visitors in hotels    | 60 percent |
| Number of days        | 365    |
| Occupancy             | 65 percent |
On this basis annual visitor volume would be:

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

= 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 swimsuit, etc.)
   - nicer craft and gift merchandise with emphasis on tropical, marine and Florida products.
   - citrus fruit stand (with shipping capabilities)
   - book shop
2. Convenience store (1,000 square feet) comparable to a first class 7-Eleven Store with emphasis on picnic and snack foods and items that appeal to or are needed by tourists on the road.

III. Accommodations

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

IV. Services

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

V. Show Program

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

Two rough sketches of the "super map" in plain view--as roughed out by Alan Eskew during the charrette are included as Figure 2 for interest and clarification. The map has an indoor/outdoor "feel" or concept that is relatively inexpensive to build. It does not involve expensive audio-animatronics or full exhibit structure and equipment. It can be walked on. It is a simulated
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 2
### LAND AND BUILDING AREAS AND CONSTRUCTION COSTS

<table>
<thead>
<tr>
<th>Area Type</th>
<th>Land Area (s.f.)</th>
<th>Building Area (s.f.)</th>
<th>Unit Cost ($ s.f.)</th>
<th>Total Cost ($000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0 Food Service</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1 Themed Family</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Restaurant</td>
<td>12,000¹</td>
<td>15,000</td>
<td>$167</td>
<td>$2.500</td>
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<tr>
<td>1.2 Citrus Center</td>
<td>1,200</td>
<td>1,000</td>
<td>90</td>
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<td>1.3 Snack/Deli</td>
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<td>500</td>
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<td>11,800</td>
<td>16,500</td>
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<td>$2.650</td>
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<td>2.0 Merchandising</td>
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<tr>
<td>2.1-2.5 Gift/Souvenir Shops</td>
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<td>125</td>
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<td>2.6 Convenience</td>
<td>1,000</td>
<td>80</td>
<td>0.080</td>
<td></td>
</tr>
<tr>
<td>2.7 Sun Health Ctr.</td>
<td></td>
<td>200</td>
<td>65</td>
<td>0.013</td>
</tr>
<tr>
<td></td>
<td>9,840</td>
<td>8,200</td>
<td></td>
<td>$0.838</td>
</tr>
<tr>
<td>3.0 Hotel</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.1 200-Key Motel²</td>
<td>72,000</td>
<td>120,000</td>
<td>$55k/room</td>
<td>$11.000</td>
</tr>
<tr>
<td>4.0 Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.1 Awesome restrooms</td>
<td></td>
<td></td>
<td></td>
<td>$0.150</td>
</tr>
<tr>
<td>4.2 &amp; 4.3 Info and Reservations</td>
<td>960</td>
<td>800</td>
<td>$150</td>
<td></td>
</tr>
<tr>
<td>4.3 Promotional kiosks</td>
<td></td>
<td></td>
<td></td>
<td>0.120</td>
</tr>
<tr>
<td>4.4 New Resident Info Sponsored</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.5 Banking</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.6 Phone Bank</td>
<td></td>
<td></td>
<td></td>
<td>0.015</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$0.285</td>
</tr>
<tr>
<td>5.0 Show</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.1 Florida Discovery Map</td>
<td>62,000</td>
<td>62,000</td>
<td>$48</td>
<td>$3.000</td>
</tr>
<tr>
<td>5.2.1 History of Tourism</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.2.2 Florida Treasures</td>
<td>2,400</td>
<td>2,000</td>
<td>$300</td>
<td>0.850</td>
</tr>
<tr>
<td>5.2.3 Electronic Map</td>
<td></td>
<td></td>
<td>+$250k</td>
<td></td>
</tr>
<tr>
<td>5.2.4 Toy Boats</td>
<td></td>
<td></td>
<td></td>
<td>0.050</td>
</tr>
<tr>
<td>5.3 Mini Play Park</td>
<td>5,000</td>
<td>5,000</td>
<td></td>
<td>0.250</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$4.150</td>
</tr>
<tr>
<td>Table (continued)</td>
<td>Land Area (s.f.)</td>
<td>Building Area (s.f.)</td>
<td>Unit Cost ($ s.f.)</td>
<td>Total Cost ($000)</td>
</tr>
<tr>
<td>-------------------</td>
<td>------------------</td>
<td>----------------------</td>
<td>--------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>6.0 Auto Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.1 Station</td>
<td>40,000</td>
<td>2,000</td>
<td>---</td>
<td>$0.250</td>
</tr>
<tr>
<td>6.2 Car Wash</td>
<td></td>
<td></td>
<td></td>
<td>$0.050</td>
</tr>
<tr>
<td>7.0 Site Amenities</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.1 Auto &amp; Bus Parking (700 cars)</td>
<td>284,000</td>
<td>---</td>
<td>$3.50</td>
<td>$0.994</td>
</tr>
<tr>
<td>7.2 Signature Pylon</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>0.200</td>
</tr>
<tr>
<td>7.3 Entrance Statement &amp; Landscaping</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>0.250</td>
</tr>
<tr>
<td>8.0 Building Common Areas</td>
<td></td>
<td></td>
<td></td>
<td>$1.444</td>
</tr>
<tr>
<td>8.1 Administration</td>
<td>---</td>
<td>5,000</td>
<td>$70</td>
<td>$0.350</td>
</tr>
<tr>
<td>8.2 Common Seating &amp; Promenade</td>
<td>---</td>
<td>8,000</td>
<td>$60</td>
<td>0.480</td>
</tr>
<tr>
<td>8.3 Furnishing/Fixtures</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>0.200</td>
</tr>
<tr>
<td>8.4 Graphics</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>0.150</td>
</tr>
<tr>
<td></td>
<td>15,600</td>
<td></td>
<td></td>
<td>$1.180</td>
</tr>
<tr>
<td>GRAND TOTAL</td>
<td>505,600</td>
<td></td>
<td></td>
<td>$21.852</td>
</tr>
<tr>
<td></td>
<td>or 11.6 acres</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1 10,000 square foot footprint.
2 Phase 1 is 200 rooms with indoor pool and 1-2 meeting rooms.
<table>
<thead>
<tr>
<th>Item</th>
<th>With Motel</th>
<th>Without Motel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction Cost</td>
<td>$21,852,000</td>
<td>$10,852,000</td>
</tr>
<tr>
<td>A &amp; E Costs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7% of $16.3 million</td>
<td>1,147,000</td>
<td>590,000</td>
</tr>
<tr>
<td>7 1/4% of $8.1 million</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Design Costs</td>
<td>325,000</td>
<td>325,000</td>
</tr>
<tr>
<td>Interim Financing</td>
<td>2,622,000</td>
<td>1,302,000</td>
</tr>
<tr>
<td>Pre-opening Expenses</td>
<td>1,000,000</td>
<td>750,000</td>
</tr>
<tr>
<td>Contingency - 10 percent</td>
<td>2,185,000</td>
<td>1,085,000</td>
</tr>
<tr>
<td></td>
<td>$29,131,000</td>
<td>$14,094,000</td>
</tr>
<tr>
<td>Rounded Off Total</td>
<td>$30,000,000</td>
<td>$15,000,000</td>
</tr>
</tbody>
</table>

Table 3

PROJECT DEVELOPMENT COSTS - FLORIDA DISCOVERY
Table 4

POTENTIAL GROSS AND NET REVENUES OF THE PROPOSED PROJECT

<table>
<thead>
<tr>
<th>Activity</th>
<th>Gross Revenue (in $)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurant ($9.00 average check:</td>
<td></td>
</tr>
<tr>
<td>$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 -</td>
<td></td>
</tr>
<tr>
<td>1,500 s.f. at $300/s.f.</td>
<td>450,000</td>
</tr>
<tr>
<td>Gifts and Souvenir Stores -</td>
<td></td>
</tr>
<tr>
<td>6,000 s.f. at $200/s.f.</td>
<td>1,200,000</td>
</tr>
<tr>
<td>Gas Station</td>
<td>1,000,000</td>
</tr>
<tr>
<td>Motel - 51,100 room nights</td>
<td></td>
</tr>
<tr>
<td>at $54.50/room</td>
<td>2,785,000</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>
Section 5

CONCLUSIONS

Conclusions drawn from the charrette consensus are highlighted as follows:

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

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

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

October 21-22, 1985

Prepared by:
HARRISON PRICE COMPANY
366 S Bonnie Ave
Los Angeles, California 90065

213-937-3457
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Section I
INTRODUCTION

Harris Price Company was retained in October 1985 to organise 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 Charrrette was to assemble a group of experienced recreation and attraction experts who would, in an intensive two day, uninterrupted conference:

- evaluate the essential economic performance and operating parameters of the proposed concept avoiding any built-in "preconceived patterns";
- 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 entering stages 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 travel industry, representing experience. James White, President of the Space Needle Corporation, has an extensive background in attraction management at Six Flags and the Space Needle. Steady backers is a successful independent attraction designer with extensive experience in the amusement park field—particularly at Busch Gardens. Alan Eshew was responsible for the site development plan at New Orleans for Louisiana Exposition and heads up an architectural practice with a strong focus on recreation projects. Harry Wilson is a principal in a very successful design practice.

The development of the concept of exhibits, exhibits, visitor centers, and related attractions. Nick Window (who was located in several years)
# Table 1

**List of Participants**

- Janice Krutext
- James L. White III
- Tom Evans Jr.
- Carol
- Thomas Mobley, Consultant, Florida's Department of Geology
- Florida Discovery and the City of Jacksonville
- Harry L. Wilson Jr.
- Design and Production Inc.
- Harry Larkins
- Harry Larkins Associates
- R. Allen Eskew
- Eskew, Voge, Salzato and Fehon
- Hanson A. Price
- Nicholas S. Winslow
- Hanson Price Company
and Hansen Price between them have extensive background in economic planning and feasibility analysis for a wide range of attractions. As head of Paramount's Future General, Wilmott has specific background in filmic and other high technology approaches to the attractions field.

The group assembled at the Federation at St. John's Place for the two days October 21st and 22nd 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 the group attempted to come to grips with appropriate redirection of the concept and a plan of action for implementation of the project.
The writeups that follow attempt to highlight and summarize the concerns 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 presentation of the opportunity and the general outline of theme and content.
Section II

The Project Environment

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

Site Requirements and Availability

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

Site Required Per Million Attende:

<table>
<thead>
<tr>
<th>Description</th>
<th>Area Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peak Week (at 15%)</td>
<td>150,000</td>
</tr>
<tr>
<td>Peak Week Estimated (3/4)</td>
<td>33,860</td>
</tr>
<tr>
<td>Peak Day (at 20%)</td>
<td>6,772</td>
</tr>
<tr>
<td>Average in Site - Peak Estimated (30%)</td>
<td>20,322</td>
</tr>
</tbody>
</table>

Acres required (at 500/acre) = 4.1

Visitor Parking       20,322 / 3.2 = 6,350
Employee Parking      150

Area for parking:

Total Average Parking
Expansion (50% to 100%) (6 - 1200) = 18 - 24 acres

Four sites were considered. Two are close to downtown and two at the edge of downtown. One site downtown was considered to be well located with respect to the commerce center and the proposed automated sheway. A second concept of the project involved the development of a multi-purpose facility oriented towards the downtown business center. Site 4 with its possible access considered to be the best of those discussed. It is under the control of the Jacksonville Transportation Authority. Precise location of the 4 sites discussed shown in Figure 1.
The group stayed away from downtown orientation because the number of hotel overnighters is relatively small in the city. House will chair the committee, but this project is best suited where it can attract attendance from the float of highway visitors in the area.

Both destination and pass-through tourists were considered much more important to Rouse for a tourist-oriented attraction of the kind contemplated than from access to the freeway system coupled with the availability of city park land. The project cannot sustain an exorbitant price for land acquisition.

In that regard, tax increment financing is available in a distinct part of 19-95. The city can assist in land acquisition in other ways, for example, Rouse is paying $100,000 rent for land valuable as direct subsidy. Revenue bond and a land leading may be available to assist the project. Condemnation processes may be available to assist site acquisition.

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

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

The attractions in the area are normal with Marine Studios at St Augustine the largest draw (reported to be somewhere around the 350,000 for modern marks). St Augustine has a variety of smaller attractions - the Tall Story and Old Town - and the beaches are important attractions. In Jacksonville itself there is an Audubon - Bush Beauty Tour - a nominal draw - and virtually, nothing else worthy of mention - the fields is open.

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

Admission prices, though not specifically reviewed in the charette, are expected on the low end.

The House Riverfront Festival Marketplace is scheduled to open in June 1987. At 125,000 square feet it is dedicated to 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 of large numbers of visitors in the market area. It may not directly synergistic to Florida Discovery which intended to gain its support from a different segment of the tourist market through its’ emphasis on the resident market.
# Market Support

## Preliminary Discussion

A preliminary study of the market size/support yielded the following information to the project. 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:** 3,600,000

- Passer-Byx: 2,600,000

**Total Potential Market Size:** 7,500,000

---

The resident market has a high growth rate with a large immigration, falling growth among the black population in 10% of the metro area. The pass by market is estimated at 5.5 million passengers 75-95 (plus ant on 7 to 10 and 0 to 75) less the three auto visitor segments talked above (1.200,000, 700,000, and 950,000) or 2.6 million.

The new convention center is projected to add 1,200 room nights of 250,000 deaths with a growth rate of 1.0% which will give the visitor a healthy tone.
It was noted that Florida visitation has a high repeat rate 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 restaurant like "But Tree, Anderson's" and strong identity (the world's most famous bathrooms of a high visibility device that were discussed as an example, successful Madonna Inn).

The 1984 median of tourist family income was $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 service the retail trade, some 13,000 in the Jacksonville CBD (Area of dominant interest). Duval County contains approximately 9,000, the Jacksonville CBD, a normal 1400 of which 1000 are designated first class.

Most hotels/motels are peripheral and found on I-95 and on the beaches rather than downtown. Downtown had about 3,000 hotel rooms just a few years ago but many 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 should get a shot in the arm with these scheduled openings:

- Convention Center 10/86
- Rouse 7/87
- Omni Hotel (350 rooms) 1/87
- People Mover 1/88

For Florida Deannay, the last hotel base is 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 (13000) 13000
- Number Per Room (2.3)
- Average Stay (8 days)
- Visitors in Hotels (10%)
- Number of Days (365)
- Occupancy (60%)  

Annual visitor volume would be:

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

\[
= 3,250,000
\]

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

Although the flow of tourism is annual lumens in Florida with only 2 or 3 slow months (October, November, May), the climate in Northern Florida is more stringent than that of Central Florida. Weather begins in the winter, and the snowbound month will be a necessity. That kind of approach will be essential for year-round 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 weathered to accomplish that purpose.

It is a gateway, hospitality and orientation center and must fulfill those functions. It is an oasis for the traveler from the North to the major attraction in central and southern Florida. It should appeal to a family and an above average concentration of older & during 2/3 of the year.

Major impact must be achieved to make it work. It's the world's best rest stop—like a truck stop only for tourists on vacation.
Most of its elements are geared to a modest staytime 1 ½ to 3 hours. Although it can attract an overnight business, 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 tune with a luxuriously landscaped environment. Theming and other devices must be used to establish that this is not an ordinary roadside stop. Florida—real or perceived—should be featured.

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

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

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

Nutt Tree (between Sacramento and the Bay Area) - drawing over 5 million.

South of the Border (a major stop in South Carolina) - attendance over 3 1/2 million.

Pee Wee Anderson's (at Solvang between LA and San Francisco) - attendance over 2 million.

Jegers at Frankenmuth, Michigan - a German theme with attendance over 2 1/2 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 the main highway 5 between LA and points north - attracting well over 2 million.

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

Zellers - an attraction complex near Atlantic City,

Hadley's on the East West Route - on LA - near Palm Springs - on February the 16th (the 60's) - attracting over 3 million dollars worth of business.
The above are all successful basis stop plans that become main attractions because they featured some kind of simple quality with a plain food, merchandising, and accommodations service typical in all of them along with certain elements.

In addition to these stops several themed restaurant and entertainment centers shed light upon the diversity of the Jacksonville area. Specifically, reference may be made to Casa Bonita in Denver - a Mexican-themed restaurant drawing over 1½ 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.

On these places we find the places that will give the motorist and tourist that it requires whether it is an elaborately themed motel.

We are attempting to visualize ideas for theme of Florida Discovery that for spencers will stop 1½ million people.

To theme and content that set the place apart and are successful in attracting large visitation on major highway routes. This is the nature of the opportunity in Jacksonville at Florida Discovery.
Specific Content of the Attack

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 Andersen,
Zender's, Peter Pan, Casa Bruta, Zabros,
Horse Ranch) it would stress good value,
good tasting, large portions, great
value, and moderate price. The themed
ambience—fish, birds, and lush planting on display.

Its menu orientation should address
a strong statement about the heart 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 juices and fruit served
  at the table—perhaps free
- An outstanding Song or 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 1½ to 3 hours to eat and play.

II. Merchandising

1. Gift Shops - 5,000 square feet of gift and souvenir shopping opportunities including:
   - Flora souvenir selections.
   - Wearable shop (T-shirts, seers and sunnies etc)
   - Gift shop (novelty and gift items)
     with emphasis on tropical, marine and Florida products
   - Citrus fruit stand (withthernut capabilities)

2. Convenience Store (over 8,000 sq ft)
   Comparable to a first-class 7-11 store with emphasis on premium snack foods and items that appeal to people 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 or "attractions" or "experience" in their own right.
2. Phone bank
3. Sponsored promotional riches
4. New resident information center (if planned)
5. Forest information center / reservation referral service
6. Photo opportunities and service

I Show Program

1. Centipiece of Florida Discovery is a large scale map of Florida on a map table to allow "walk" the entire state: cities, and maybe other selected areas, could be made of aerial photographs imbedded in ceramic tiles.
2. 250' long landscaped map of Florida comprised of grass and shrubbery:
3. Map surrounded by water with electric powered boats in the water, flamingos and other exotic birds:
4. Major highways in the state would be sidewalks to allow guests to "walk" the entire state:
5. This entire landscaped map would serve as the focal point of the attraction with the themed restaurant
6. Rough sketches of the "super map" - as roughed out. The" signatures 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 structure. It can be walked on. It is a simulated tour of Florida in a garden setting, among trees in a courtyard surrounded by water setting the state off as it actually is. Random special effects are applicable without heavy cost.

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

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

4. Museum (1,000 s.f.) highlighting the history of tourism in Florida.

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

6. Children's Play/Recreation Area
   1/2 acre McMillan type play area for children

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

   INSERT A diagram here

V. Auto Service

4. A high tech gas station containing:
   - a place of aggregation to create a memory with:
     - a car wash (cheap and fast)
     - full service with a smile
     - many lanes, large size
   - impeccably clean restrooms like Disney
   - other distinguishing characteristics yet to be fleshed out

VII. Site Amenities

1. Auto and bus parking - formed and landscaped with succulent plants

2. Signature pylon

3. Entrance statement

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

The idea of using the Coy and a transport 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 honorable role of Florida tourist developers. The project would have a hall of fame as it were. People like Walt Disney, Mr. Pope, Mr. Busch, George Miller, Mr. Jacobsen and Swann felt – and others – that who have developed the immense tourist of Florida by the attractions of quality would be honored.
Section II
Land and Building Area and Costs

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

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

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

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</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</td>
<td>Food Service</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1</td>
<td>Themed Family Restaurant</td>
<td>12,000</td>
<td>15,000</td>
<td>$167</td>
<td>$2,500</td>
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<tr>
<td>1.2</td>
<td>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</td>
<td>Snack/Deli</td>
<td>600</td>
<td>500</td>
<td>120</td>
<td>0.060</td>
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<td></td>
<td>Total</td>
<td>11,800</td>
<td>16,500</td>
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<td>2.650</td>
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<td>2.0</td>
<td>Merchandizing</td>
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<td></td>
<td></td>
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<td>2.1-2.5</td>
<td>Gift/Souv. Shops</td>
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<td>5,000</td>
<td>125</td>
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<td>2.6</td>
<td>Convenience</td>
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<td>2.7</td>
<td>Sun Health Ctr</td>
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<td>80</td>
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<td></td>
<td>Total</td>
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<td>8,200</td>
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<td>3.1</td>
<td>200 Room Hotel</td>
<td>7,200</td>
<td>120,000</td>
<td>$55K/Room</td>
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<td>4.0</td>
<td>Service</td>
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<td>4.1</td>
<td>Avenue Restaurant</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td>4.2/3</td>
<td>Inexp. Reservations</td>
<td>960</td>
<td>800</td>
<td>150</td>
<td>0.120</td>
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<tr>
<td>5.0</td>
<td>Show</td>
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<tr>
<td>5.1</td>
<td>Florida Discovery Map</td>
<td>6,400</td>
<td>62,000</td>
<td>$48</td>
<td>3,000</td>
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<tr>
<td>5.2.1</td>
<td>History of Florida, Inc.</td>
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<tr>
<td>5.2.2</td>
<td>Florida Treasury</td>
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<td>2,000</td>
<td>$300</td>
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<td>5.2.3</td>
<td>Electronic Map</td>
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<td>5.2.4</td>
<td>Toy Boats</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>5.3</td>
<td>Mini Play Park</td>
<td>5,000</td>
<td>5,000</td>
<td></td>
<td>0.250</td>
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<tr>
<td></td>
<td>Total</td>
<td>5,810</td>
<td>6,200</td>
<td></td>
<td>4.150</td>
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<td>Station</td>
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<td>6.2</td>
<td>Can Work</td>
<td></td>
<td></td>
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<td>Total</td>
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<td></td>
</tr>
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<td>7.0</td>
<td>Site Amenities</td>
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<td>7.1</td>
<td>Auto &amp; Bus Parking Lot</td>
<td>284,000</td>
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<td>$3.50</td>
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<td>7.2</td>
<td>Signature Pylons</td>
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<td></td>
</tr>
<tr>
<td>7.3</td>
<td>Entry Statutes + Landscaping</td>
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<td></td>
<td></td>
<td>0.200</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>0.200</td>
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<td></td>
<td></td>
</tr>
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<td>8.0</td>
<td>Building Common Areas</td>
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<td>8.1</td>
<td>Administration</td>
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<td>Containment area</td>
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<td>8.3</td>
<td>Furnishings &amp; Fixtures</td>
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<tr>
<td>8.4</td>
<td>Graphics</td>
<td></td>
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<tr>
<td></td>
<td>Total</td>
<td>15,600</td>
<td></td>
<td>$1.150</td>
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<tr>
<td></td>
<td>Grand Total</td>
<td>505,600</td>
<td></td>
<td>$21,852</td>
<td></td>
</tr>
</tbody>
</table>

21 Phased to 200 rooms with indoor pool and 1-2 meeting rooms
22 10,000 sq. ft. Footprint
Table 3

Project Development Costs - Florida Design

<table>
<thead>
<tr>
<th></th>
<th>With Metal</th>
<th>Without Metal</th>
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</thead>
<tbody>
<tr>
<td>Construction Cost</td>
<td>$21,852,000</td>
<td>$10,852,000</td>
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<tr>
<td>A+E Costs</td>
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<td></td>
</tr>
<tr>
<td>7% of $16.3MM</td>
<td>1,147,000</td>
<td>590,000</td>
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<tr>
<td>7.4% of $8.1MM</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>Pregnancy Expenses</td>
<td>1,000,000</td>
<td>750,000</td>
</tr>
<tr>
<td>Contingency 10%</td>
<td>2,185,000</td>
<td>1,085,000</td>
</tr>
<tr>
<td>Total</td>
<td>$29,131,000</td>
<td>$14,094,000</td>
</tr>
<tr>
<td>Rounded Off Excl. Value of land</td>
<td>$30 Million</td>
<td>$15 Million</td>
</tr>
</tbody>
</table>
Potential Revenues of Proposed Project

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

Total Potential Revenue $9,935,000
Net Revenues $6,147,000

Less Gas Station at 610 k lease were ($900,000)
Less Motel at 670 ground lease ($2,678,000)

Net Revenues $6,417,000
Conclusions drawn from the charette 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 it revenue generating capability.

* The revised project developed by the charette group appears to have a sound basic concept. World's first rest stop located between the East Coast and Florida there seems to be a sufficiently broad and compelling package of services, food and entertainment components to get tourists to stop and local residents to come again and again. The estimated revenues conservatively estimated should be able to make financial sense, and therefore, discussions 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 traveling 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 operating cost successful examples of transit stops achieving mass attraction status above. The point of the exercise is to bring that level of execution to Jacksonville, an underserved market area. The architecture employed must engender a sense of permanence and added the essence. Showmanship must lie outstanding, the place must not look like a tourist trap.

- The project is geared to local tourism market but is not limited to 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 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 marketplace even though it will depend primarily for its support on local residents and office workers, destination tourists and business visitors now staying in the market area. Although it is a very positive influence, it is not directly synergistic to Florida Discovery which intends to gain its support from a different crowd—primarily from the large flow of pass-through and family oriented tourism and secondarily from the resident market.
Market Support

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

<table>
<thead>
<tr>
<th>Market Size</th>
<th>Estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Resident Market Size:</strong></td>
<td></td>
</tr>
<tr>
<td>Primary Market (Duval, St. John and North Clay Counties)</td>
<td>750,000</td>
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<tr>
<td>Jacksonville ADI</td>
<td>550,000</td>
</tr>
<tr>
<td><strong>Total Resident Market</strong></td>
<td>1,300,000</td>
</tr>
<tr>
<td><strong>Tourist Market Sizes (per data compiled by Rouse):</strong></td>
<td></td>
</tr>
<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></td>
</tr>
<tr>
<td><strong>Passer-Bys</strong></td>
<td>2,600,000</td>
</tr>
<tr>
<td><strong>Total Potential Market Size</strong></td>
<td>7,500,000</td>
</tr>
</tbody>
</table>

The resident market has a high growth rate with a large immigration fueling growth. The black population is 38 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:

- **Convention Center**
  - October 1986
- **Rouse**
  - July 1987
- **Omni Hotel (350 rooms)**
  - January 1987
- **People Mover**
  - January 1988

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>Factor</th>
<th>Value</th>
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</thead>
<tbody>
<tr>
<td>Total number of rooms</td>
<td>13,000</td>
</tr>
<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>
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</tbody>
</table>
Annual visitor volume would be:

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

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

Weather

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

A RECOMMENDED CONCEPT OF DEVELOPMENT
FOR FLORIDA DISCOVERY

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

Development Parameters

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

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

Most of its elements and most of its trade are geared to a modest stay time 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. It has two main restaurants, Zenders and the Bavarian Inn, entertaining about 1-million dinners each per year.
**Madonna Inn** - a large, extravagantly themed motel midway between Los Angeles and San Francisco, famous for its bathrooms and rococo design.

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

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

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

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

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

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

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

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

I. Food Service

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

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

II. Merchandising

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

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

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

IV. Services

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

V. Show Program

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

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

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

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

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

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

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

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

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

VI. Auto Service

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

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

2. Signature pylon.

3. Entrance statement.

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

LAND AND BUILDING AREAS AND
CONSTRUCTION AND DEVELOPMENT COSTS

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

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

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

## LAND AND BUILDING AREAS AND CONSTRUCTION COSTS

<table>
<thead>
<tr>
<th>Area</th>
<th>Land Area (s.f.)</th>
<th>Building Area (s.f.)</th>
<th>Unit Cost ($ s.f.)</th>
<th>Total Cost ($000)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.0 Food Service</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1 Themed Family</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Restaurant</td>
<td>12,000¹</td>
<td>15,000</td>
<td>$167</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>
</tr>
<tr>
<td></td>
<td>11,800</td>
<td>16,500</td>
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<td>$2.650</td>
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<tr>
<td><strong>2.0 Merchandising</strong></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>2.1-2.5 Gift/Souvenir Shops</td>
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<td></td>
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<tr>
<td></td>
<td>5,000</td>
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<td>125</td>
<td>$0.625</td>
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<tr>
<td>2.6 Convenience</td>
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<td>80</td>
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<td>2.7 Sun Health Ctr.</td>
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<td>200</td>
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<td></td>
<td>9,840</td>
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<td>$0.838</td>
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<td><strong>3.0 Hotel</strong></td>
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<tr>
<td>3.1 200-Key Motel²</td>
<td>72,000</td>
<td>120,000</td>
<td>$55k/room</td>
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<td><strong>4.0 Services</strong></td>
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<tr>
<td>4.1 Awesome restrooms</td>
<td>---</td>
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<td>$0.150</td>
</tr>
<tr>
<td>4.2 &amp; 4.3 Info and</td>
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<td>800</td>
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<td>Reservations</td>
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<tr>
<td>4.3 Promotional kiosks</td>
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<td></td>
</tr>
<tr>
<td>4.4 New Resident Info</td>
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<td>Sponsored</td>
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</tr>
<tr>
<td>4.5 Banking</td>
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</tr>
<tr>
<td>4.6 Phone Bank</td>
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<td></td>
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<td></td>
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<td>$0.285</td>
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<td><strong>5.0 Show</strong></td>
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<td>5.1 Florida Discovery Map</td>
<td>62,000</td>
<td>62,000</td>
<td>$48</td>
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<tr>
<td>5.2.1 History of</td>
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<tr>
<td>Tourism</td>
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<tr>
<td>5.2.2 Florida Treasures</td>
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<td>$300</td>
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<td>5.2.3 Electronic Map</td>
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<td>+$250k</td>
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<tr>
<td>5.2.4 Toy Boats</td>
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<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>$4.150</td>
</tr>
<tr>
<td>6.0 Auto Services</td>
<td>Land Area (s.f.)</td>
<td>Building Area (s.f.)</td>
<td>Unit Cost ($ s.f.)</td>
<td>Total Cost ($000)</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------------</td>
<td>---------------------</td>
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</tr>
<tr>
<td>6.1 Station</td>
<td>40,000</td>
<td>2,000</td>
<td>---</td>
<td>$0.250</td>
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<tr>
<td>6.2 Car Wash</td>
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<td></td>
<td>0.050</td>
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<tr>
<td>7.0 Site Amenities</td>
<td></td>
<td></td>
<td></td>
<td>$0.300</td>
</tr>
<tr>
<td>7.1 Auto &amp; Bus Parking (700 cars)</td>
<td>284,000</td>
<td></td>
<td>$3.50</td>
<td>$0.994</td>
</tr>
<tr>
<td>7.2 Signature Pylon</td>
<td>---</td>
<td></td>
<td>---</td>
<td>0.200</td>
</tr>
<tr>
<td>7.3 Entrance Statement &amp; Landscaping</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>0.250</td>
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<tr>
<td>8.0 Building Common Areas</td>
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<td></td>
<td></td>
<td>$1.444</td>
</tr>
<tr>
<td>8.1 Administration</td>
<td>---</td>
<td>5,000</td>
<td>$70</td>
<td>$0.350</td>
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<tr>
<td>8.2 Common Seating &amp; Promenade</td>
<td>---</td>
<td>8,000</td>
<td>$60</td>
<td>0.480</td>
</tr>
<tr>
<td>8.3 Furnishing/Fixtures</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>0.200</td>
</tr>
<tr>
<td>8.4 Graphics</td>
<td>---</td>
<td></td>
<td></td>
<td>0.150</td>
</tr>
<tr>
<td></td>
<td>15,600</td>
<td></td>
<td></td>
<td>$1.180</td>
</tr>
<tr>
<td>GRAND TOTAL</td>
<td>505,600</td>
<td></td>
<td></td>
<td>$21.852</td>
</tr>
<tr>
<td>or 11.6 acres</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1 10,000 square foot footprint.

2 Phase 1 is 200 rooms with indoor pool and 1-2 meeting rooms.
Table 3

PROJECT DEVELOPMENT COSTS - FLORIDA DISCOVERY

<table>
<thead>
<tr>
<th>Item</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>1,147,000</td>
<td>590,000</td>
</tr>
<tr>
<td>Design Costs</td>
<td>325,000</td>
<td>325,000</td>
</tr>
<tr>
<td>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>Rounded Off Total Exclusive of Land</td>
<td>$30,000,000</td>
<td>$15,000,000</td>
</tr>
<tr>
<td>Description</td>
<td>Revenue</td>
<td></td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>---------------</td>
<td></td>
</tr>
<tr>
<td><strong>Restaurant</strong> ($9.00 average check:</td>
<td>$4,500,000</td>
<td></td>
</tr>
<tr>
<td>$7.50 food and $1.50 beverage)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>500,000 covers</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Citrus/Snack Stand</strong></td>
<td>450,000</td>
<td></td>
</tr>
<tr>
<td>1,500 s.f. at $300/s.f.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Gifts and Souvenir Stores</strong></td>
<td>1,200,000</td>
<td></td>
</tr>
<tr>
<td>6,000 s.f. at $200/s.f.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Gas Station</strong></td>
<td>1,000,000</td>
<td></td>
</tr>
<tr>
<td><strong>Motel - 51,100 room nights</strong></td>
<td>2,785,000</td>
<td></td>
</tr>
<tr>
<td>at $54.50/room</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Potential Revenue</strong></td>
<td>$9,935,000</td>
<td></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><strong>Net Revenues</strong></td>
<td>$6,417,000</td>
<td></td>
</tr>
</tbody>
</table>
Section 5

CONCLUSIONS DRAWN FROM THE CHARRETTE

Consensus are highlighted as follows:

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

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

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

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

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