



CLAY COUNTY TOURISM STRATEGIC PLAN

OCTOBER 25, 2022



BLACKDOG





October 25, 2022

Ms. Kimberly Morgan
Director of Tourism and Film Development
Clay County Board of Commissioners
477 Houston Street
Green Cove Springs, Florida 32043

Dear Ms. Morgan:

CSL and our project partners at BlackDog Advertising have completed the study process and preparation of this Tourism Strategic Plan for Clay County. Organizations and individuals throughout the Clay County region have contributed to this process. Input from over 500 residents and over 50 local and regional organizations have contributed valuable insight into the preparation of this Plan. Our research process included outreach to sports tournament and league organizers, event planners, visitor industry representatives in competitive and aspirational markets, and analysis of existing data provided by your team.

This Tourism Strategic Plan will serve as a valuable tool in helping to shape a vision for future development, identify opportunities to distinguish and elevate Clay County within the visitor industry, and manage tourism growth to protect the interests of local residents and enhance their quality of life. The recommendations presented herein cannot be implemented by a single entity or agency. In fact, participation from a variety of public and private sector entities will be necessary to realize the potential of Clay County in the visitor industry economy. This Plan can serve as a roadmap for the diverse organizations that will be relied on to help implement key recommendations.

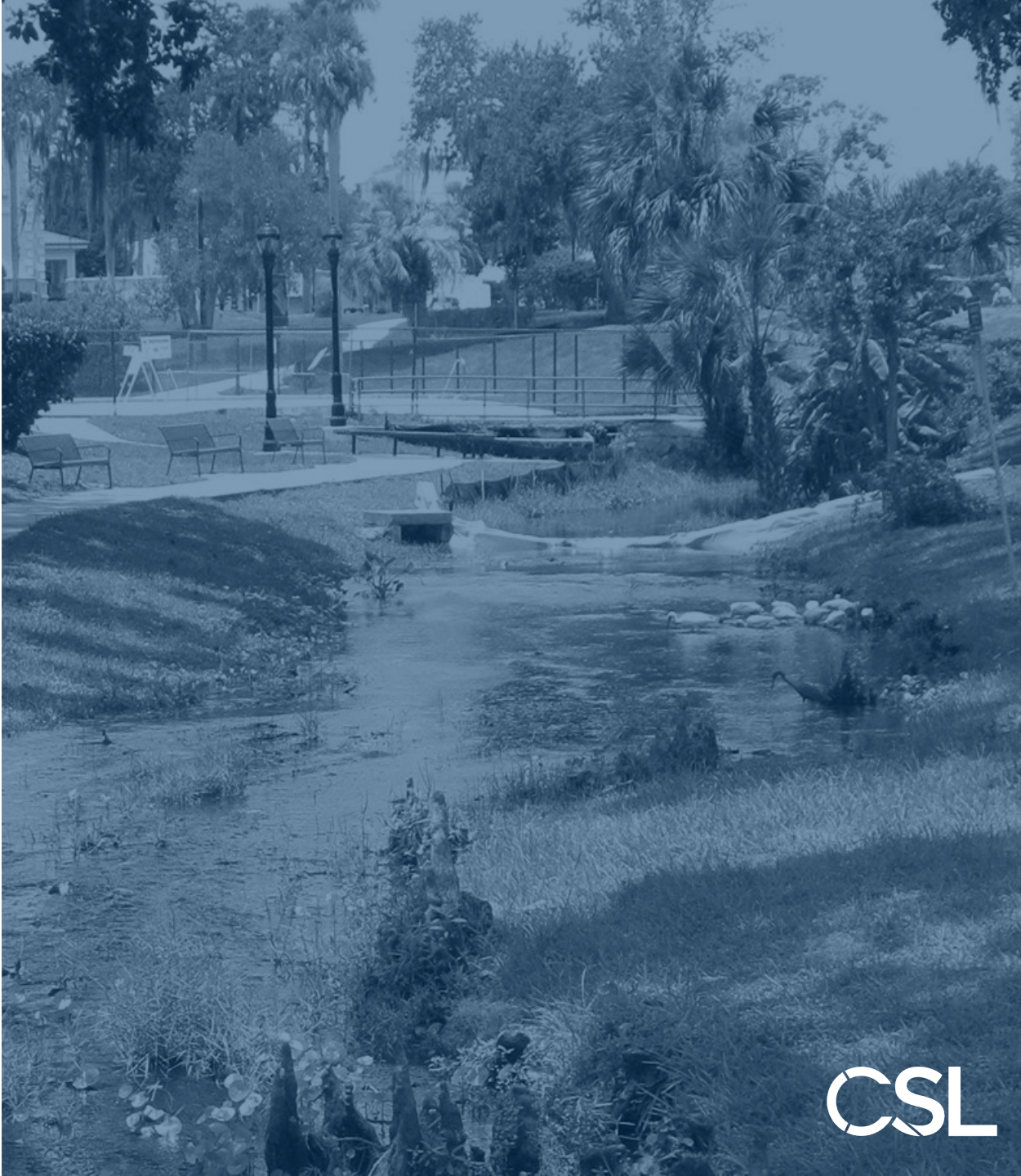
The participation of you and your staff has been integral to the success of the study process. We greatly appreciate your professionalism in all respects during the preparation of this Plan.

Very truly yours,

CSL International

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1

Introduction

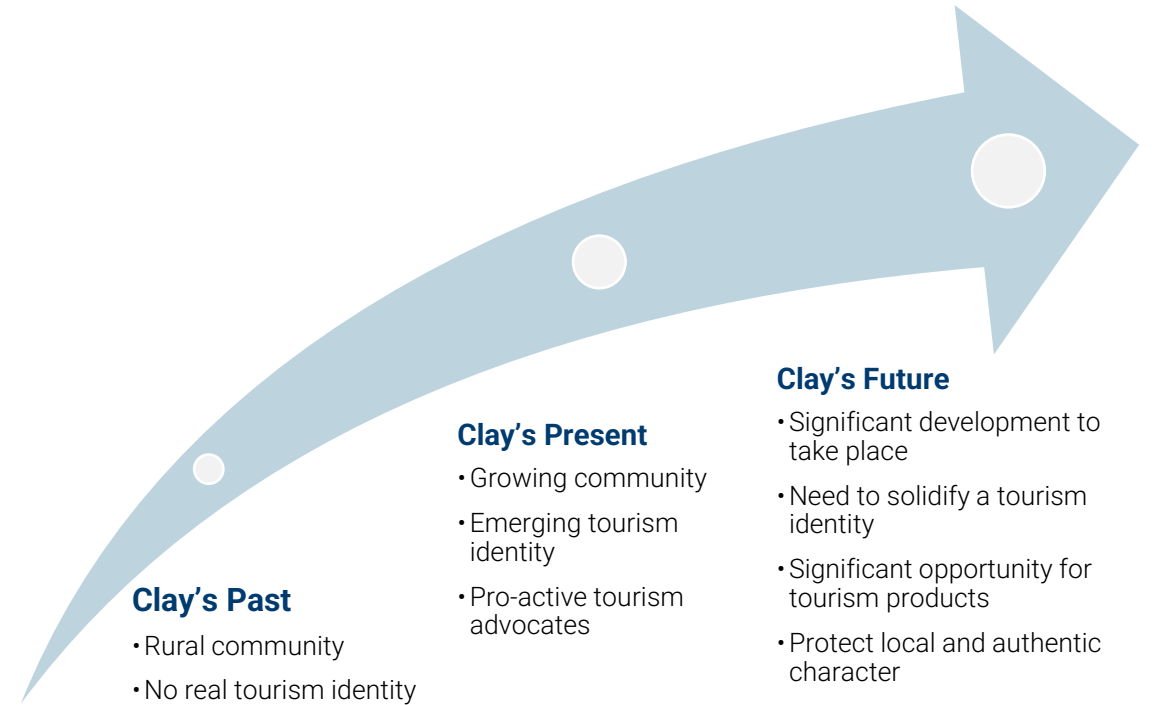
1. INTRODUCTION: The Destination Strategic Plan

The economy of any destination can be influenced by many factors outside the control of community leaders. Economic conditions, corporate relocations, changes in governmental or institutional presence and other factors will influence employment, income, tax revenues and other critical aspects of an economy.

In Clay County, as with many communities, the visitor industry has the potential to play an increasingly important role in local and regional economic health. Visitors to a market offer an opportunity to inject new dollars into the economy, with only limited use of public infrastructure. Visitor spending then generates net new tax revenue, reducing the tax burden on residents. The Clay County Tourism office has led the recent emergence of tourism marketing in the community, and has created a base from which to significantly advance as a visitor destination as Clay County continues to undergo development.

At the same time, it is equally critical to manage the growth of tourism and to protect the unique and authentic character of the destination. To gain greater market share as a destination while also improving as a place to live and work for its residents and workers, Clay County retained CSL to develop an action-oriented, forward looking Tourism Strategic Plan that creates a strategic vision for enhancement of destination assets and sustained growth in tourism-related economic impacts.

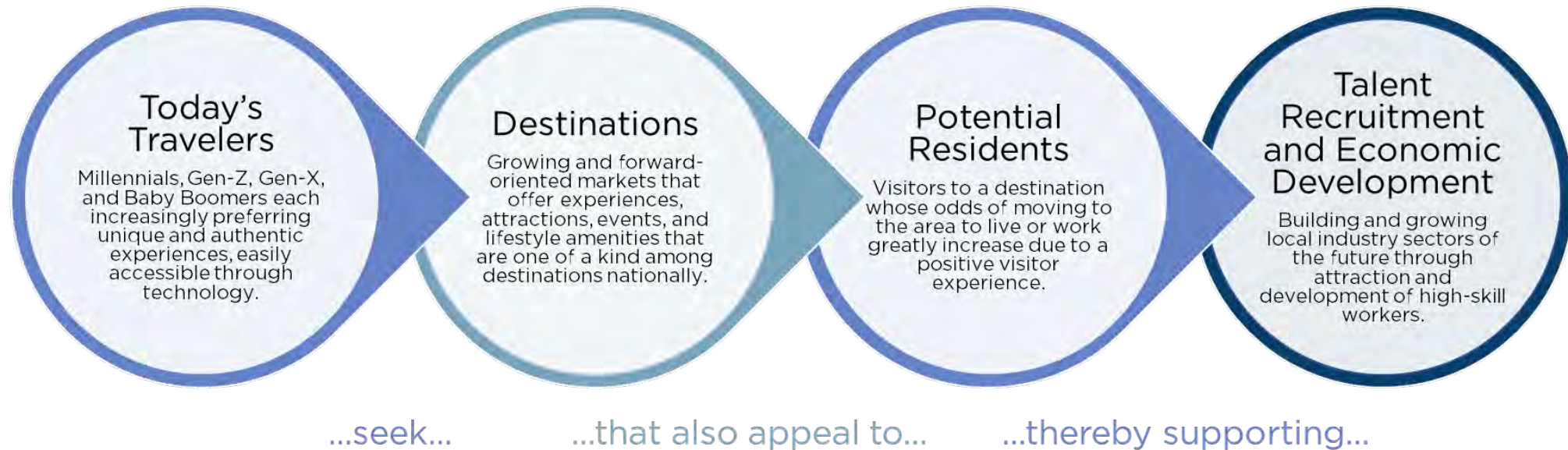
This TMP is designed to serve as a valuable tool in helping to shape a vision to develop, distinguish and elevate the market within the visitor industry, and tie this evolution to advancements in the area's quality of life and economic development. The community outreach associated with this process has been significant, designed to ensure that the opinions of a broad cross-section of the resident base and influential community stakeholders is fully reflected.



1. INTRODUCTION: Tourism and Economic Development

Tourism as a Holistic Economic Development Tool

Though primarily seen as a tool for drawing visitors and growing room nights in a destination, this Tourism Strategic Plan can also provide support for economic development initiatives that make for a highly desirable place to live and work. Through the creation of attractions, amenities, and events and festivals that align with consumer, lifestyle, and travel trends, a destination can become more attractive to prospective full-time residents and employers in addition to leisure, group, and sports visitors. The graphic below summarizes these elements.



The Tourism Strategic Plan presented herein considers this dual-importance of tourism-related investment in the Clay County area, with many of the recommendations having both a visitor industry and broader resident quality of life, talent recruitment and economic development benefit.

The specific research elements and study process for identifying these opportunities are summarized on the following page.



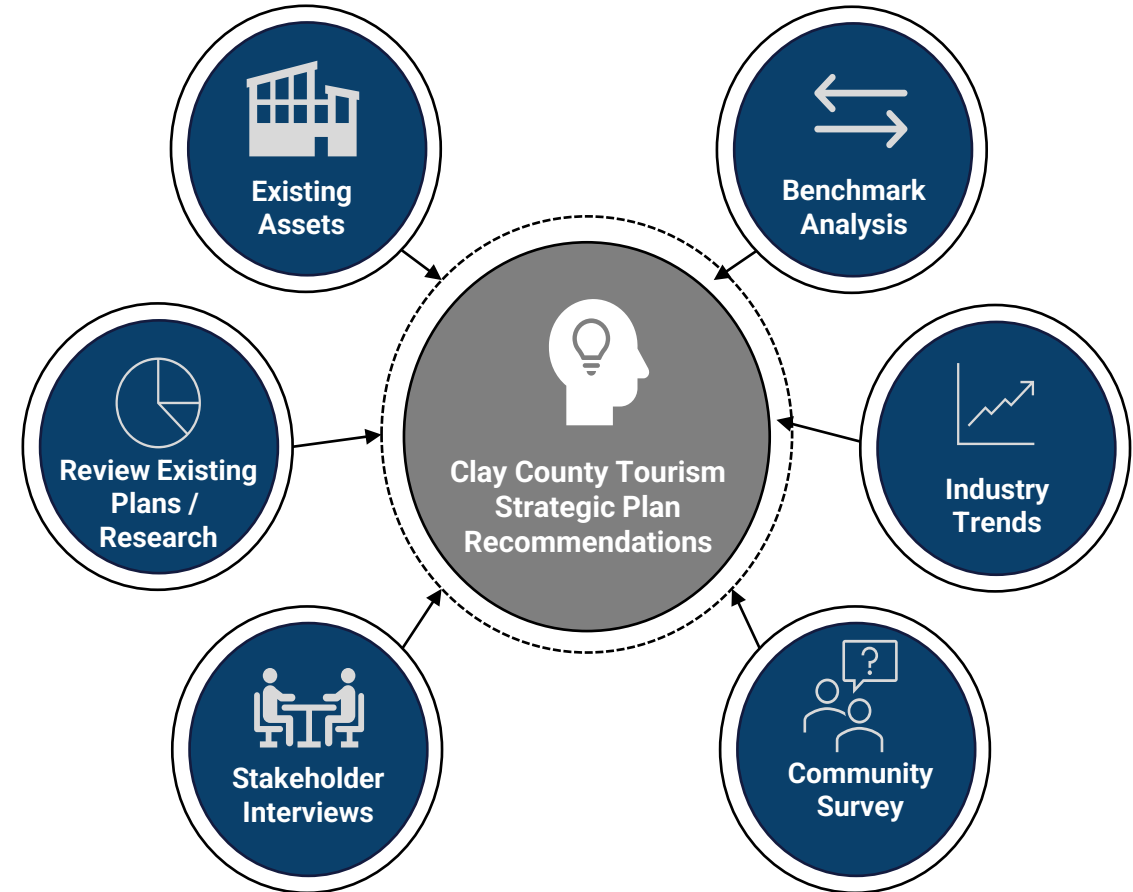
1. INTRODUCTION: Research Summary

The process of developing the Clay County Strategic Plan has been highly collaborative and research-based, with specific analysis steps including the following:

- Conducted over 50 interviews with local and regional organizations from the public and private sector.
- Made a four-person, four-day site visit consisting of extensive tours of notable Clay County destination assets.
- Analyzed extensive data, research and existing reports on visitor industry assets and performance, in the Clay County area.
- Performed extensive demographic, socioeconomic, behavioral and spending analysis of Clay County's drive-in visitor base.
- Surveyed over 500 local residents in partnership with Clay County.
- Interviewed more than 35 out-of-market planners of conventions, sports tournaments, concerts and festivals to discuss potential tourism development opportunities in the County.
- Completed in-depth comparative analysis of the Clay County area with 6 similar markets throughout Florida and the country.
- Conducted case study research in more than 30 markets throughout the country focusing on creative visitor-generating assets.
- Developed seven areas of focus from which to base recommendations for the enhancement of the Clay County area's destination product, programming and policies.

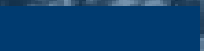
The recommendations presented herein cannot be implemented by a single entity or agency. In fact, participation from a variety of public and private sector entities will be necessary to realize the potential of the Clay County area in the visitor industry economy.

We sincerely appreciate the assistance and cooperation we have been provided in the completion of this process and would be pleased to be of further assistance in the interpretation and application of our findings.





2 | Existing Asset Overview

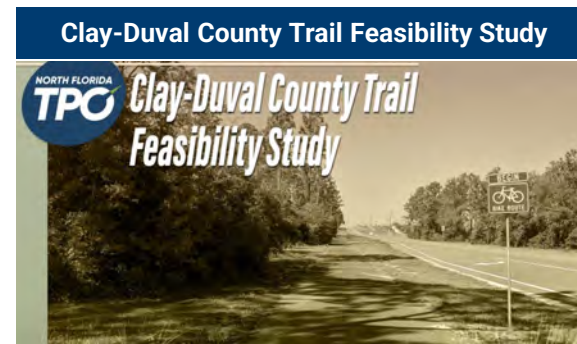
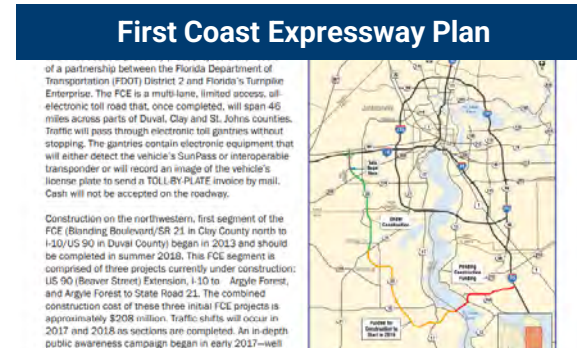
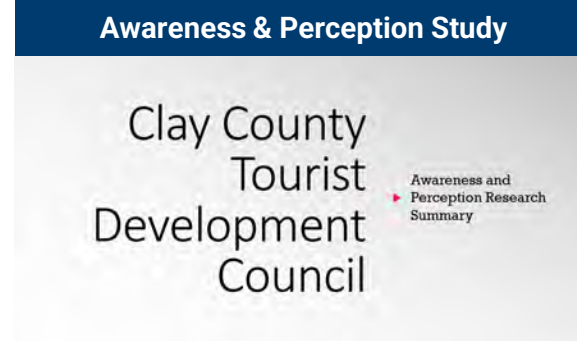


2. RESEARCH SUMMARY: Past Effort Review

CSL utilized past study efforts prepared by communities within the County, on a County-wide bases, and by various state agencies. The data, analysis and recommendations contained in these studies provides an important perspective on current conditions, planned and on-going initiatives, and on future visions that may impact both the quality of life for residents and the ability to attract an increasing share of the visitor market.

Specific research and studies included in our review include, but are not limited to the following.

- Awareness & Perception Study – Provided a clear context as to how the County is perceived by leisure travelers in the Jacksonville metro area, as well as the overall level of awareness of existing County assets.
- Master Plans – Detailed past, current and potential future development projects taking place in Middleburg, Green Cove Springs, Walnut Street, among others.
- Regional Park Plan – Provides detailed and aspirational plans for first of its kind multipurpose sports and recreation park in Clay County.
- Clay-Duval County Trail Study – Described the current and potential future conditions in Clay County with respect to a variety of outdoor assets that can benefit resident quality of life and spur potential increases in visitation.
- First Coast Expressway – Yielded guidance for the various potential development zones that currently present and will begin to present opportunities for connectivity, lodging, retail and other development.



2. EXISTING ASSETS: Demographic Analysis

The exhibit to the right illustrates the demographic profile captured within a 15-, 30-, 60-, 90-, 120-, and 180-minute estimated driving distance from the center of Clay County. Additionally, the demographic profile for Clay County, the State of Florida, and the US are highlighted by the exhibit.

Clay County and its surrounding drive times exhibit higher historic and projected population growth rates compared to the State of Florida, and significantly higher rates compared to the country as a whole. The Clay County population base is projected to grow by 1.46 percent annually, compared to the US at 0.72 percent annually. These data highlight the importance of undertaking strategic planning to provide assets that support sustainable resident growth and enhance the Clay County tourism economy.

The County's (\$75k) median household income is over \$10,000 higher than that of the US (\$65k); however, Clay's (\$33k) per capita income is over \$2,000 less than that of the US (\$35k). This is likely attributed to the average household size of Clay County being higher than that of the US.

Clay County has an employee/residential population ratio of 0.25:1 compared to the US ratio of 0.45:1. This reflects a high proportion of Clay residents leaving the County for work in the Jacksonville metropolitan area, as well as a relatively small Clay County corporate base.

DEMOGRAPHIC VARIABLE	15 Minutes	30 Minutes	60 Minutes	90 Minutes	120 Minutes	180 Minutes	Clay County	State Of Florida	United States
POPULATION:									
2010 Total Population	19,076	171,864	1,327,267	2,177,489	3,253,856	9,031,392	190,865	18,801,310	308,745,538
2021 Total Population	21,383	204,927	1,558,508	2,551,009	3,802,618	10,626,649	227,387	21,733,419	333,934,112
2026 Total Population	23,511	219,169	1,671,251	2,741,431	4,082,070	11,428,962	243,968	23,197,833	345,887,495
Historical Annual Growth (2012-2022)	1.21%	1.92%	1.74%	1.72%	1.69%	1.77%	1.91%	1.56%	0.82%
Projected Annual Growth (2022-2027)	1.99%	1.39%	1.45%	1.49%	1.47%	1.51%	1.46%	1.35%	0.72%
AGE:									
Median Age	41.9	39.5	38.1	39.7	42.8	40.3	39.4	42.8	38.8
Population age 25 to 44	25.10%	26.74%	27.47%	26.26%	24.55%	26.17%	26.67%	25.16%	26.77%
AGE DISTRIBUTION:									
Under 15	17.31%	18.08%	18.01%	17.06%	16.05%	16.77%	17.97%	15.94%	18.17%
15 to 24	11.23%	11.91%	13.18%	12.92%	11.85%	12.57%	12.08%	11.42%	12.78%
25 to 34	13.36%	14.36%	14.66%	14.00%	13.00%	14.02%	14.52%	13.30%	13.99%
35 to 44	11.74%	12.38%	12.81%	12.26%	11.55%	12.15%	12.15%	11.86%	12.78%
45 to 54	13.13%	13.12%	12.19%	11.94%	11.54%	11.83%	13.12%	11.96%	12.05%
55 and over	33.25%	30.16%	29.15%	31.82%	36.02%	32.67%	30.15%	35.52%	30.21%
HOUSEHOLD INCOME:									
Median Household Income	\$66,869	\$71,997	\$58,973	\$58,717	\$56,158	\$56,758	\$75,129	\$58,462	\$64,730
Per Capita Income	\$29,653	\$31,605	\$31,736	\$32,366	\$31,331	\$30,846	\$32,654	\$32,917	\$35,106
BUSINESS:									
Total Business 2021	478	5,343	63,057	98,061	139,125	403,707	6,276	978,439	12,013,469
Total Employees 2021	3,873	47,884	721,499	1,076,550	1,460,069	4,382,674	57,412	9,165,693	150,287,786
Employee/Residential Population Ratio	0.18:1	0.23:1	0.46:1	0.42:1	0.38:1	0.41:1	0.25:1	0.42:1	0.45:1

Note: The point used to indicate drive times was taken from the geographic center of Clay County.
Source: ESRI, 2022.

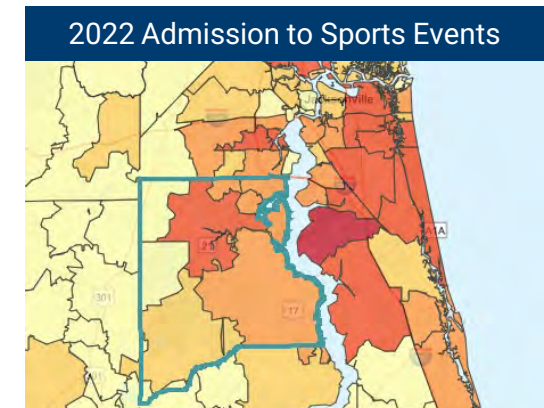
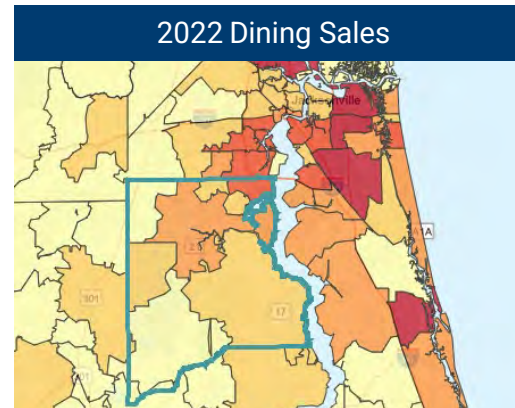
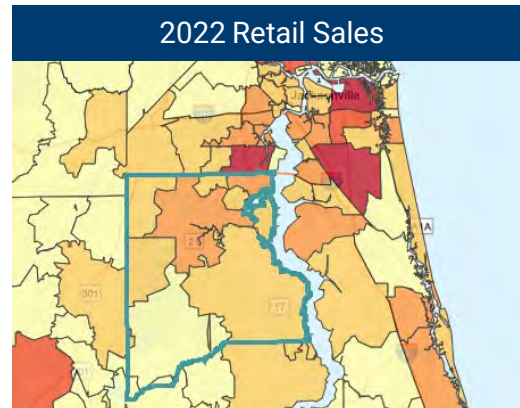
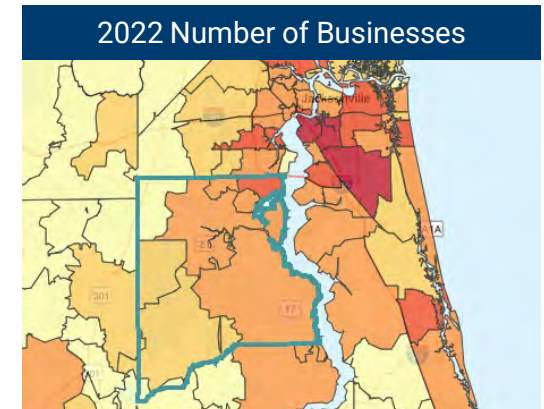
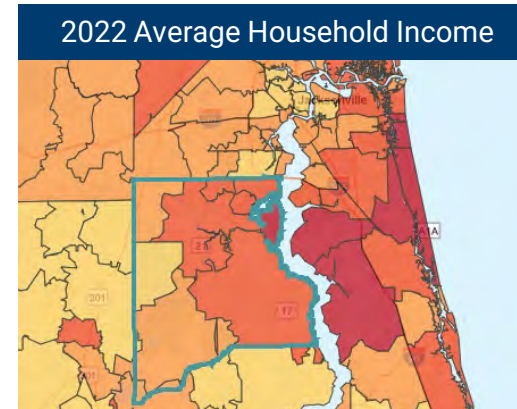
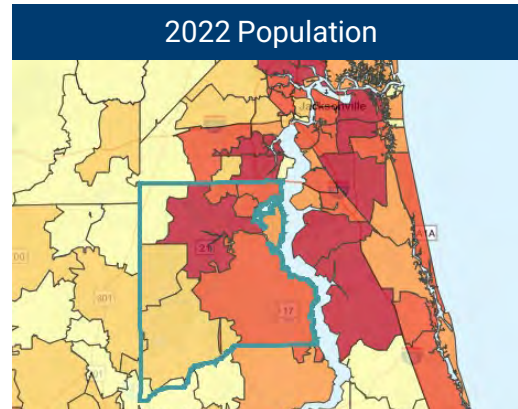
2. EXISTING ASSETS: Heat Maps

The heat maps to the right provide a visualization of geographic areas with higher concentrations of activity among various population, income, businesses, sales, and spending. A deeper red color indicates higher concentration while a lighter, yellow color indicates lower concentration.

Clay has a high concentration of both population and average household income compared to the surrounding metropolitan area. However, it has lower concentration of retail and dining sales, businesses, and admission to sports events spending.

These data are reflective of a “bedroom community” with a significant resident workforce commuting to work and making purchases in nearby areas with higher commercial density.

Adding to the restaurant, residential, attraction, and commercial base in Clay will, over time, help to increase economic activity and provide assets that benefit a growing residential base.



Source: ESRI, 2022.



2. EXISTING ASSETS: Major Market Profiles

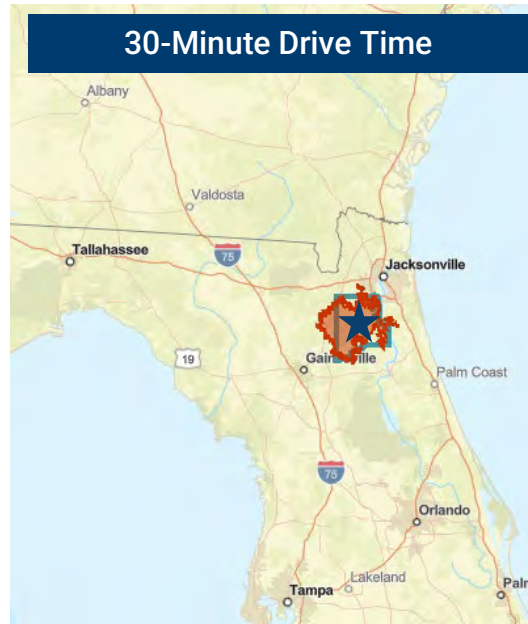
The maps and data presented below highlight the top five market profiles that are descriptive of the population within the various listed drive times surrounding Clay County. These data provide an understanding of the demographic and psychographic profiles of residents within a given area. Demographic definitions and population share by type are provided by ESRI.

Within 30 minutes drive time of Clay, the population profile tends to reflect:

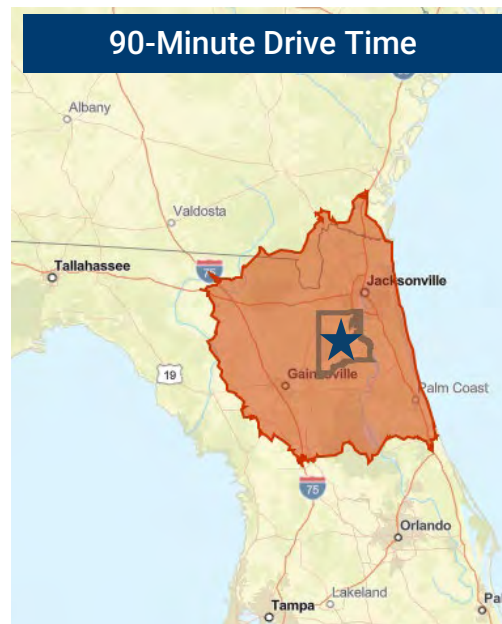
- “Up and Coming Families,” which is reflective of the ongoing residential development in the County.
- “Southern Satellites,” which consist of slightly older, settled married-couple families, who own their homes.

As the drive time expands to 90 minutes, “Southern Satellites” are the most prominent, followed by “Middleburg” designated residents, who are prominently residents in semirural subdivisions developed in the last decade. These residents are traditional, family-oriented consumers.

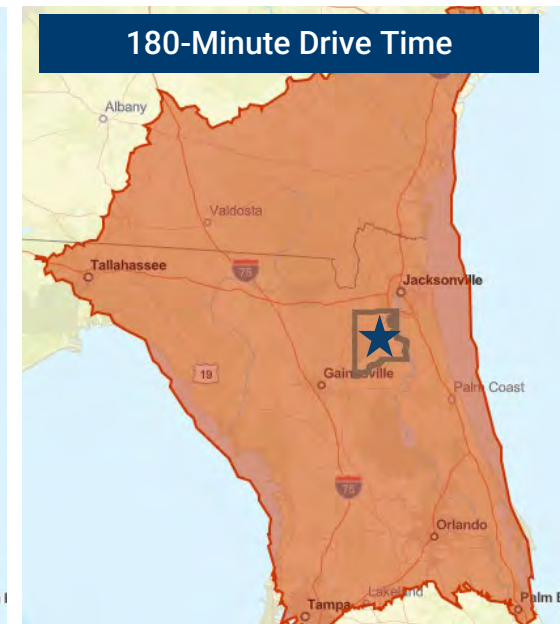
At a drive time of 180 minutes, we find residents defined as “Senior Escapes”, or residents in dwellings that are highly seasonal, yet owner occupied. About half are in unincorporated and more rural areas. Nearly one-fifth of the population is between 65 and 74 years old. The 180-minute drive time also encompasses a significant share of “Southern Satellites” and “Middleburg” residents.



- Up and Coming Families (17.7% of population)
- Southern Satellites (12.5% of population)
- Comfortable Empty Nesters (8.4% of population)
- Home Improvement (6.1% of population)
- Green Acres (5.6% of population)



- Southern Satellites (6.2% of population)
- Middleburg (6.0% of population)
- Bright Young Professionals (4.9% of population)
- Midlife Constants (4.2% of population)
- Up and Coming Families (4.0% of population)



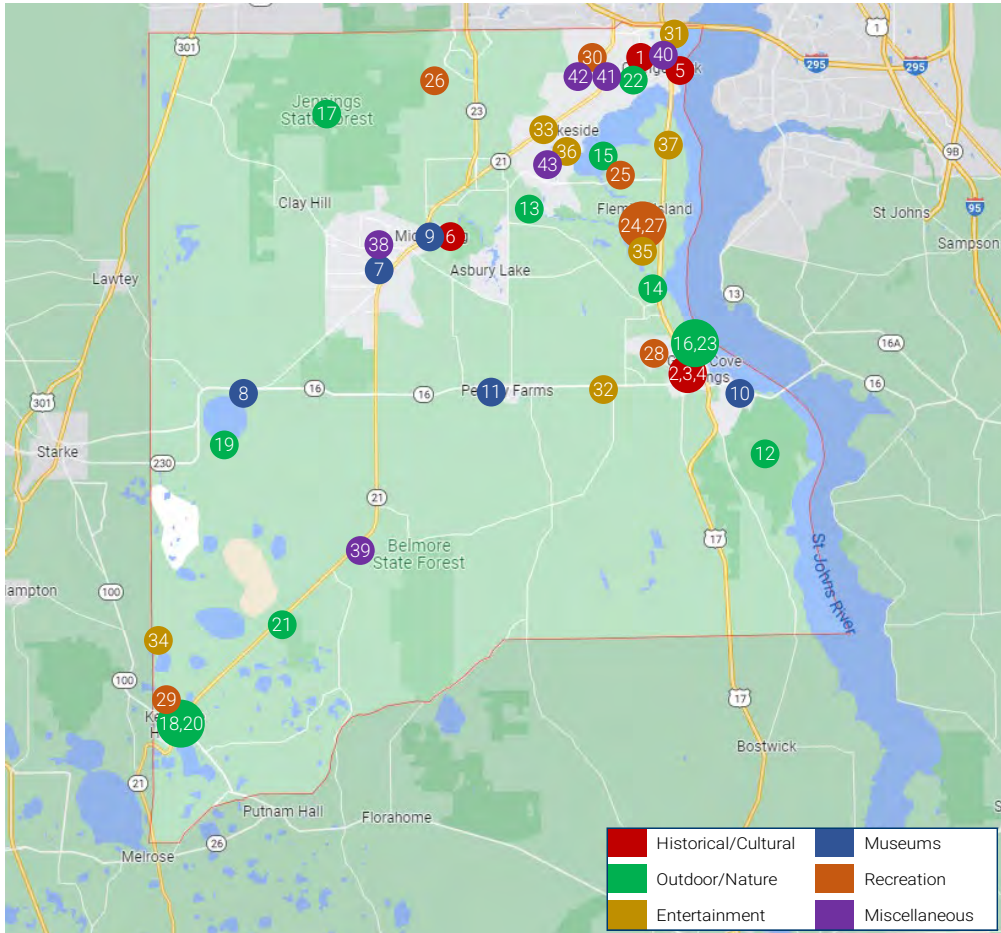
- Senior Escapes (5.5% of population)
- Southern Satellites (5.1% of population)
- Middleburg (4.7% of population)
- Up and Coming Families (4.4% of population)
- Urban Edge Families (4.0% of population)

Source: ESRI, 2022.



2. EXISTING ASSETS: Clay Attraction Inventory

Clay has many existing attraction assets within the County today. Its assets cover a variety of categories including historical/cultural, outdoor/nature, entertainment, museums, recreation, and other. These assets tend to be individually interesting, but do not represent a critical mass or concentration that can support significant non-local visitation. We also note that the social media activity/reviews for Clay destination assets are low relative to other markets in the region. This suggests an opportunity for a coordinated effort to enhance the ability of management at individual attractions to leverage social media.



Source: Explore Clay, TripAdvisor, 2022.

Attraction	Attraction
1 Clarke House Park	24 Top of the Tee at Fleming Island Golf Club
2 Clay County Historic Courthouse	25 Eagle Harbor Golf Club
3 Clay County Jailhouse	26 Eagle Landing Golf Club
4 Clay County's Historic Triangle	27 Fleming Island Golf Club
5 Club Continental	28 Magnolia Point Golf Club
6 Master Sgt. John E Hayes Memorial Park	29 Palatka-To-Lake-Butler State Bike Trail
	30 Skate Station Orange Park
7 Black Heritage Museum	
8 Camp Blanding Museum and Memorial Park	31 Best Bet
9 Middleburg Historical Museum	32 Clay County Fairgrounds
10 Military Museum of North Florida	33 Just Smash It Rage Room
11 Town of Penney Farms Historic Museum	34 The FIRM
	35 The Island Theater
12 Bayard Conservation Area	36 Thrasher-Horne Center
13 Black Creek Trail	37 Valhalla Indoor Axe Throwing
14 Camp Chowenwaw Park	
15 Doctors Lake Park & Boat Ramp	38 Black Creek Distilleries
16 Green Cove Springs City Pier	39 CJ Acres Animal Rescue Farm
17 Jennings State Forest	40 Cultured Collective Brewery & Taproom
18 Keystone Heights Nature Park	41 Orange Park Mall
19 Kingsley Lake Park	42 Pinglehead Brewing Company
20 Leona F. Terry Azalea Park	43 YUM - A Southern Market
21 Mike Roess Gold Head Branch State Park	
22 Somer's Sunshine Park	
23 Spring Park	

2. EXISTING ASSETS: Clay Attraction Assets

Clay County Historic Courthouse



The historic Clay County Courthouse, located in Green Cove Springs, FL, was constructed in 1889 and is one of only 4 Florida courthouses built before 1900. Listed on the National Register of Historic Places, this destination is an important piece of Clay County History and houses the Clay County Historical Museum.

The building combines Italianate and Second Renaissance design elements such as decorative brickwork, cast iron columns, decorative metal cornices, and a distinctive round arch entrance. At the end of 2021, the County received grants from the Division of Historical Resources to undertake renovations of the courthouse's interior and exterior. Today, the Courthouse is home to Clay County Teen Court programs and serves as a venue for mock trials, swearing-in ceremonies, tours and photo shoots.

Source: Google, Company Sites, 2022.

Clay County's Historic Triangle



The Clay County Historical Triangle is the site of several important historic buildings: the Clay County Historic Courthouse, the Clay County Historical Museum and the Old County Jail.

The museum is managed by the Clay County Historical society, with a mission to preserve the County's rich heritage through the collection, preservation and display of artifacts. The abundance of exhibits, unique items and historic ambiance are seen as highlights of this experience.

The Old County Jail, also located within the Historic Triangle block, was constructed in 1884, making it the second oldest jail in the state. It is also home to the Clay County Archives. This location has previously attracted paranormal groups interested in detecting and recording paranormal activity. The location also hosts Halloween themed events during the month of October, which could be leveraged further.

Club Continental



Built in 1923, when it was known as the Palmolive Estate belonging to Caleb Johnson of the Palmolive Soap Company, Club Continental is a romantic and intimate event destination. This venue functions as a luxury, boutique hotel, event space and private club, and is located along the banks of the St. Johns River in Orange Park, FL.

Club Continental offers a collection of amenities targeting relaxation and celebration. This event space contains 22 guest rooms, 7 tennis courts, 3 swimming pools, and a club restaurant. It is equipped to host events and can be booked for gatherings ranging from 8 to 300 people.

The Club Continental has garnered 127 positive reviews on Trip Advisor. Many guests were part of small or large groups celebrating romantic events such as weddings and anniversaries.

2. EXISTING ASSETS: Clay Attraction Assets

Camp Blanding Museum & Park



The Camp Blanding Museum is part of Camp Blanding, an historic North Florida National Guard Installation which remains active today. The museum was established in 1990 and currently presents displays focusing on the history of the camp and its involvement in WWII. These displays feature uniforms, weapons, vehicles and aircrafts for visitors to view.

The Museum also features a Memorial Park, which is dedicated to preserving large military artifacts from WWII, Vietnam and Operation Desert Storm. Also included are the monuments to the divisions that trained or were stationed at Camp Blanding. The Museum is currently fundraising for a \$3 million dollar project which will help to preserve existing artifacts and to restore and expand the existing museum building to include post WWII displays.

Source: Google, Company Sites, 2022.

Military Museum of North Florida



Reynolds Industrial Park, a former Naval Air Station. The base functioned as a training hub for F6F Hellcats, which were responsible for over 5,000 shoot-downs during WWII. Today, this museum hosts a collection of equipment, weapons and uniforms, and serves as an event venue for military holidays.

Visitors can view pictures and displays from conflicts including WWI, WWII, Vietnam and Korea. This attraction has received 41 positive reviews on trip advisor, which emphasize the museum's extensive collection of memorabilia and informative tour guides as strengths of the experience. The museum also features a special display of military art from prominent artist John Shaw.

Thrasher-Horne Center



The Thrasher-Horne Center is a professional music, theater, dance, and meeting venue located on the Orange Park campus of St. Johns River State College. Opened in 2004, this \$22 million, 85,000 square foot space has hosted hundreds of events including nationally touring musicians and performers, Broadway musicals, business meetings, expos and community receptions. A diverse offering of shows has boosted audience attendance in recent years, as the venue as managed to attract productions that would not normally be available in northeastern Florida.

The Center's main stage venue can seat up 1,700 people, and its conference center holds 6,300 square feet of event space. Additional spaces include a 220 flexible-seat Studio Theater, two Visual Arts Galleries, a Dance Studio, Scene Shop and dressing rooms.

2. EXISTING ASSETS: Clay Attraction Assets

Spring Park



Spring Park is located on the St. Johns River in Green Cove Springs, FL. Amongst Spanish moss and oak trees, its facilities include numerous covered shelters designed for family gatherings and picnics, as well as playground equipment for children of all ages.

A mineral spring feeds the park's 135,000-gallon municipal swimming pool as it flows into the river. This pool recently underwent a \$2.2 million renovation which added a two-story pavilion and water splash feature along with the reconstruction of the pool itself. Another recent addition to Spring Park is the South Dock Kayak Launch, a 150-foot dock and kayak launch funded by the Land and Water Conservation Fund Grant program. This grant also funded minor improvements to the park's pavilions, playground equipment, river trails, and bridges.

Source: Google, Company Sites, 2022.

Black Creek Park and Trail

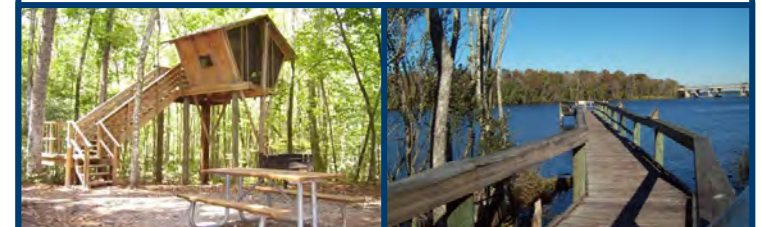


Ranked as the most popular Orange Park attraction according to Trip Advisor, Black Creek Trail is an 8-mile paved path designed for hikers, cyclists and dog walkers. The trailhead originates at Black Creek Park, which provides visitors with a paved parking area, covered pavilion and public restroom.

The trail itself passes through scenic forest and wetlands such as Moccasin Slough Park, a 255-acre wildlife preserve and nature park which is home to variety of animal species, featuring multiple recreational areas. Visitors enjoy the trail's views, shaded route and convenient parking.

The park also offers a paddling trail in which kayakers can launch and depart from within the park.

Camp Chowenwaw Park



Camp Chowenwaw Park spans 150 acres along Black Creek in the City of Green Cove, FL. Prior to Clay County's 2006 acquisition of the property, the site operated as a camp for The Girl Scout Council of Duval County for over 70 years. Today, it is managed by the county to preserve its history and natural resources.

The park also provides significant opportunities for recreation, not limited to camping, hiking, fishing, paddling, and swimming. True to its Girl Scout roots, visitors can rent treehouse-style cabins, learn about animals at the Pawpaw Nature Center, explore the Historic Girl Scout Museum, swim in the park's seasonal pool, and hike trails beside the creek.

2. EXISTING ASSETS: Clay Attraction Assets

Clay County Fairgrounds



In 2021, more than 270,000 visitors and 1,100 exhibitors took part in the Clay County Agricultural Fair in Green Cove Springs, FL. This fair has been held annually since 1987 at the Clay County "Paul E. Reinhold" Fairgrounds. The fairgrounds play an important role in the community as a tourist attraction and destination. It is estimated that nearly 50 percent of attendees travel from outside Clay County and book an average 300 hotel rooms during the week of the fair.

Spanning 28 acres, the fairgrounds hold an extensive collection of event spaces, including three exhibit buildings, two covered arenas, equestrian rings, and barns. They also employ a full-time staff to manage these facilities. Outside of the county fair, these fairgrounds are home to numerous other events and activities throughout the year, including rodeos, auctions, 4H events, and concerts.

The FIRM



Incorporating tracks and trails designed for a variety of driving styles, The Florida International Rally and Motorsport Park (FIRM) is a 430-acre motorsport facility located 8 miles south of Starke, FL. The FIRM was originally a runway for military aircraft until it transitioned into a facility for military driver training. More tracks were constructed, including a \$2 million dollar road course in 2008, and today the park accommodates all types of motorsports including go-karting, rally racing, and off-roading.

There are many prominent users of this facility, such as the Rally Pro Performance Driving School and the International Security Academy. Tracks are rented to race teams, car show programs, and film productions. Visitors can participate in regular open track days, civilian tactical experiences and exotic car drives.

Bestbet Orange Park



Bestbet is one of the state's most successful cardrooms, attracting players from Northeast Florida to play games including One Card Poker, Three Card Poker, Ultimate Texas Hold'em, and Pai Gow. Located in Orange Park, FL, this event and entertainment venue contains 37 poker tables with daily high hand promotions and weekly tournaments. Bestbet also has a second location in Jacksonville, FL.

In addition to cards, patrons can tune into racing simulcasts to wager on events taking place all around the country, such as thoroughbred, harness, and greyhound races. The simulcast center hosts televisions and private carrel seating, and food and drink are available for purchase inside the facility. Average visit time is estimated between 2 and 3 hours.

Source: Google, Company Sites, 2022.

2. EXISTING ASSETS: Clay Attraction Assets

Orange Park Mall



As the largest mall on the west side of the St. Johns River, the Orange Park Mall has become a shopping, dining and events destination for residents and visitors alike. Measuring in at over 953,000 square feet of retail space, there is a mass of available entertainment which allows the mall to serve over 3 million guests each year.

The 120 shops within the mall include anchor storefronts like JCPenney, Belk and Dick's Sporting Goods, a 24-screen AMC Theater, and a medley of dining options inside the 400-seat food court. The mall also organizes weekly, monthly, and annual events which range from group fitness to children's entertainment.

Source: Google, Company Sites, 2022.

Yum – A Southern Market



Since 2015, Yum - A Southern Market has served the City of Middleburg, FL and it's surrounding areas with premier baked goods, sweet foods and vintage candies, all based in the area's southern roots. Unique offerings include lemon bars, red velvet cupcakes and pepper jelly. Reviewers on trip advisor mention that staff service and homey atmosphere are key to the appeal of the store.

Yum – A Southern Market also sells items outside of their specialty treats. Visitors can purchase rustic home décor, bath and body products, jewelry, and candles in addition to desserts. The market sells locally produced goods and works to support small, local businesses in the area.

Fleming Island Golf Club



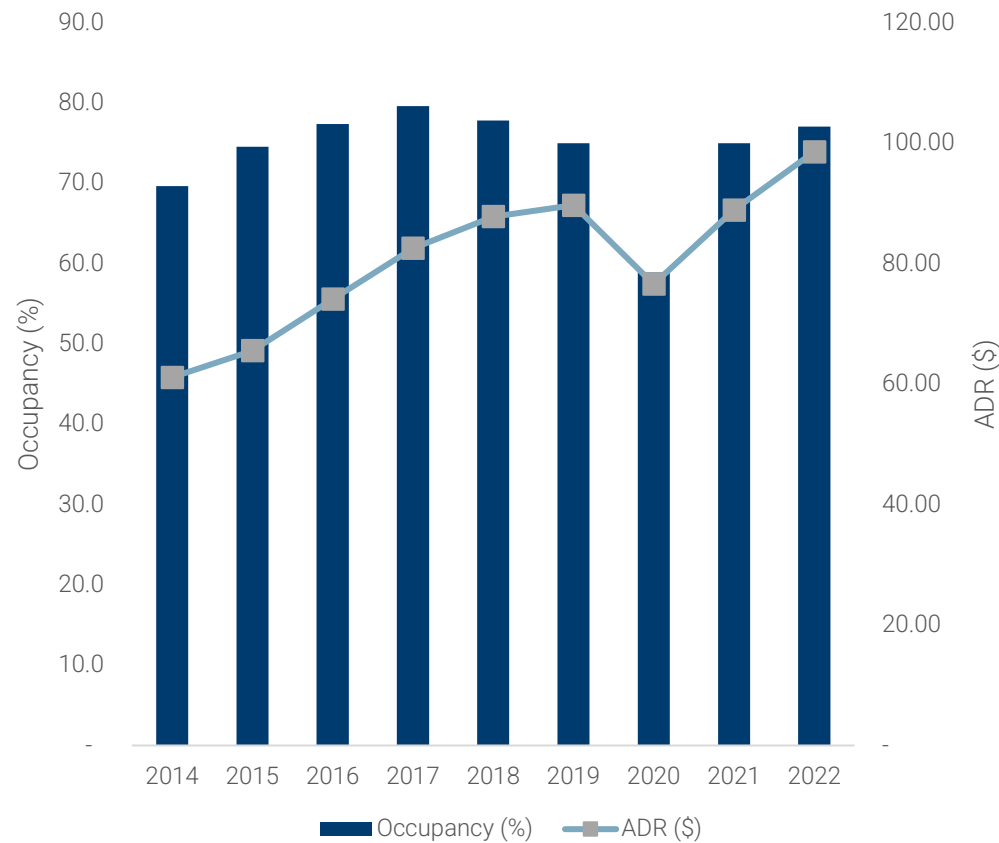
At Fleming Island Golf Club in Fleming Island, FL, golfers can play an award-winning, 6,700 yard, 18-hole course designed with natural backdrops. This par 71 course has a distinctive front and back 9. The front features ample undulations, water traps and sand bunkers. The back, in contrast, is designed for tranquility and is carved from standing timberland.

Along with the course, Fleming Island Golf Club features a full-service clubhouse, which can accommodate groups ranging from 20 to 200 for various functions and events types. Private golf instruction by former PGA players and a Top of the Tee driving range are also available. Amongst its 35 positive TripAdvisor reviews, guests remark that the course's condition and clubhouse food are highlights of the overall facility.

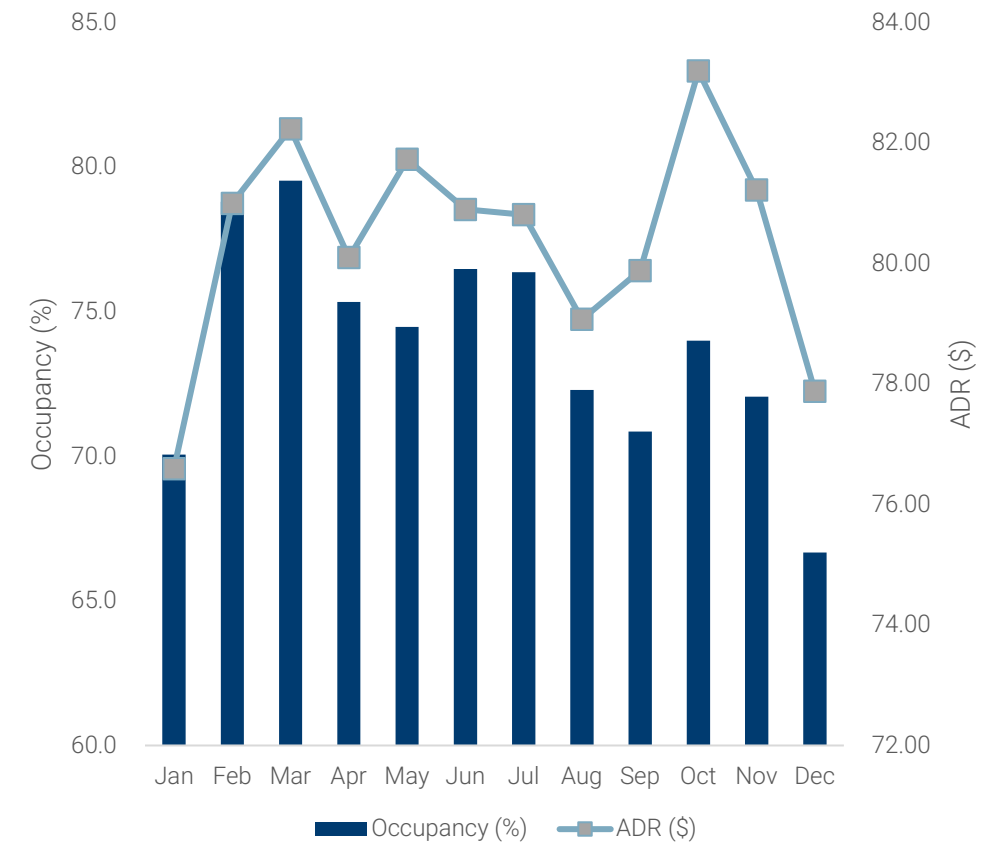
2. RESEARCH SUMMARY: STR Analysis

The lodging occupancy and average daily rate in an area is reflective of the strength of an area’s visitor industry economy. Hotel occupancy rates approaching or exceeding 70 percent indicate a strong demand and the potential market support for added product. Average daily rates at or above \$100 also suggest potential for supply increases. Since 2014, Clay County has supported occupancy levels that reach or exceed 70 percent, with ADR that has increased over time, and now slightly exceeds \$100. Planned future hotel development in the County will impact these statistics, and the new First Coast Expressway could support opportunities for even more supply growth.

Historical and Projected Occupancy and ADR by Year (2014-2022)



Historical and Projected Occupancy and ADR by Avg. Month (2014-2022)

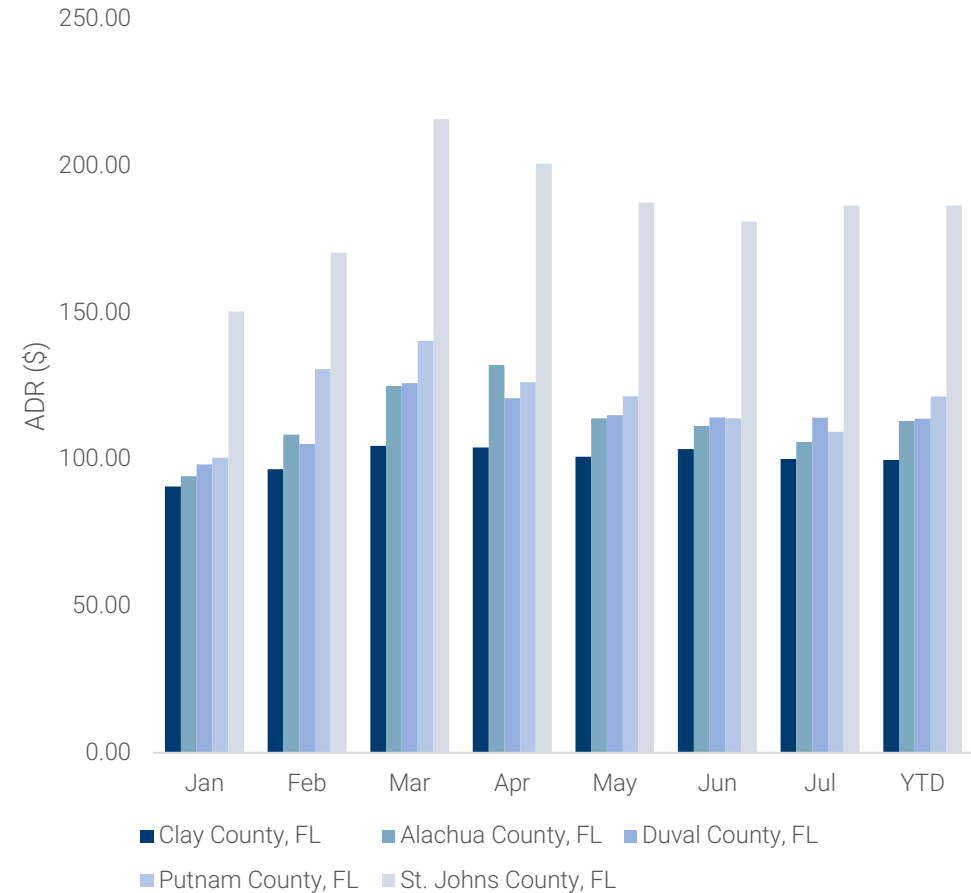
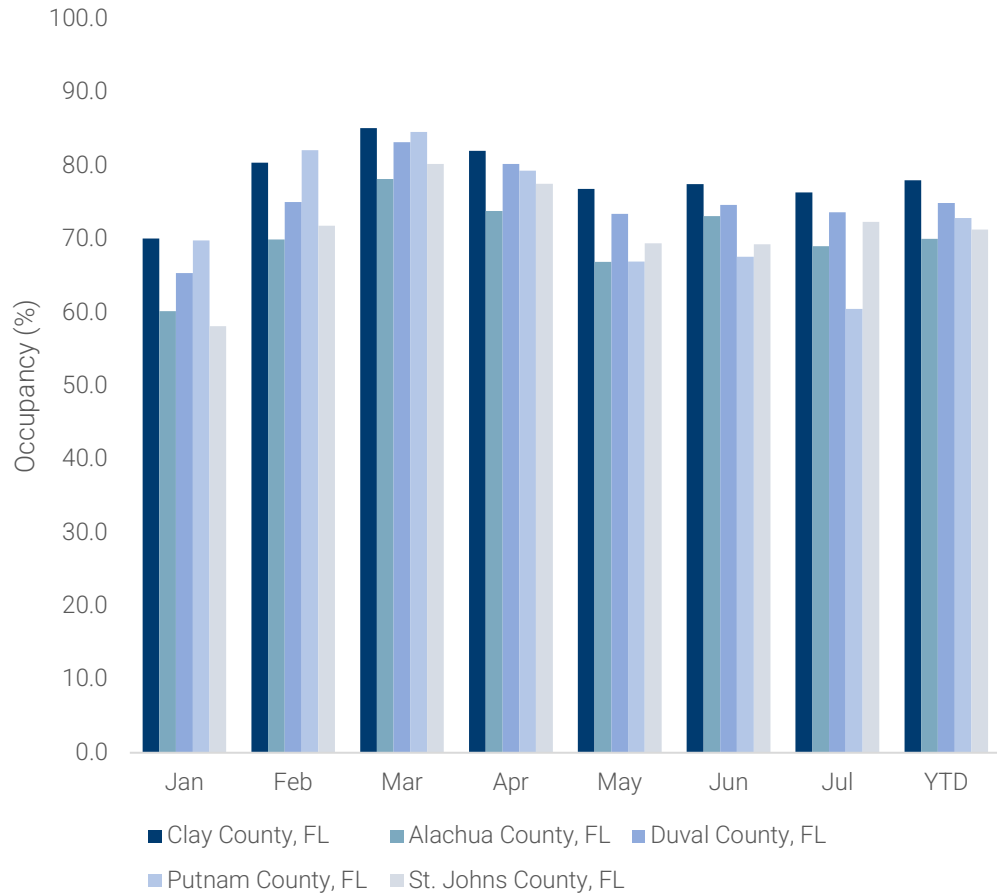


2. RESEARCH SUMMARY: STR Analysis

In comparing Clay's lodging numbers to that of its surrounding and competitive counties, Clay consistently has the highest occupancy percentage, month by month. At the same time, Clay County ADR lags the other counties reviewed. These data are indicative of the abundance of affordable, select service properties in the market. As presented later in this Plan, efforts to attract higher-end properties, potentially as part of a themed resort/attraction, should be pursued.

2022 Occupancy by County

2022 ADR by County



2. EXISTING ASSETS: Stakeholder Input – Strengths

In-person and remote interviews were conducted with 50+ stakeholders in the Clay County and surrounding area. Stakeholders represent the visitor industry, economic development, political, art and culture, parks and other sectors that can help guide strategic plan recommendations. Summaries of stakeholder input with respect to strengths, opportunities, challenges, and threats are summarized on the following pages.

Strengths of Clay

Community and People – Clay stakeholders commonly referenced the community and the people within the community to be one of Clay’s strongest traits as a County. Its residents are passionate and welcoming making them a key piece of Clay County’s competitive advantage.

Outdoor/Nature – The beauty and scenery of Clay was a commonly highlighted strength of the County for stakeholders. Stakeholders shared that the County is full of great parks, green space, and outdoor activities.

Approach to Governing – A commonly cited Clay strength involved its thoughtful and driven governmental agencies in the County and local community. Government employees and officials were recognized as strong advocates for the potential of the County and are thought of as hard-working, caring supporters of the County.

Culture/Small Town Feel – The ‘small-town’ culture of the County was referenced as a crucial piece of Clay’s identity. Stakeholders find Clay to be welcoming and warm for both visitors and residents.

St. Johns River and Lakes – The County’s water assets were often listed by stakeholders as greatly adding to the beauty and potential for the County. Stakeholders see great visitor and resident potential and opportunity for water assets such as the St. Johns River, Lake Geneva, Lake Asbury, Doctors Lake, among others.

Existing Events – The various community events in the County were seen by stakeholders as important points of pride for the County. Stakeholders commonly listed events such as the Clay County Fair, the Scottish Games, the Strawberry Festival, and other events as their favorite part of the County to show to friends and family.

Some Quality Businesses – Clay has several unique, local businesses that stakeholders see as assets to the County. Businesses such as Just A Pinch Café, Yum – A Southern Market, Spring Park Coffee, and more highlight the unique nature of the County.



Source: Stakeholder Interviews, 2022.



2. EXISTING ASSETS: Stakeholder Input – Opportunities

Opportunities for Clay

Water Access – A major point of potential for Clay County, according to stakeholders, is increasing and highlighting access to the County’s numerous natural water assets.

Events/Festivals – While seen as a strength for the County, the festivals and events have potential to grow and become more notable assets to the County. Larger events and festivals can draw visitors from outside the County to spend money in Clay.

History & Heritage – Clay County has a rich history and heritage that has the potential to support events and visitation. This ranges from 19th century historic venues to a significant place within the Southern Rock genre.

Outdoor/Nature Promotion – As outdoor assets are seen as a key strength of the County, further developing, promoting, and highlighting these assets in a meaningful way is a key opportunity.

Arts & Culture – Stakeholders view Clay as having a high amount of untapped potential in terms of artistic talent, opportunities for monumental public art and art/cultural festivals.

Family Entertainment – As families comprise a significant portion of the County, access to family-oriented entertainment options has the potential to benefit existing residents and visitors to the County.

Amateur Sports – Amateur sports are a generally underdeveloped sector in northeastern Florida. Clay County has the potential to gain high levels of increased visitation surrounding amateur sports.

Branding/Identity – Stakeholders believe that while Clay has the pieces required to develop a strong brand and identity, further defining the destination brand still presents itself as an untapped opportunity for the County.

Hotels/Restaurants/Retail – Interviewed stakeholders believe that Clay would be able to support developments of more and unique hotels, restaurants, and retail offerings.

Convention Center – Stakeholders believe that Clay could support added meeting and event space assets within the County.



Source: Stakeholder Interviews, 2022.



2. EXISTING ASSETS: Stakeholder Input – Challenges

Challenges of Clay

Traffic – The quantity of traffic and design of roadways in Clay County have been presented as a challenge for visitors and residents alike. Access to certain areas, particularly along Highway 17, can be challenging. Development of the First Coast Expressway will significantly enhance access to points throughout the County.

Managing Growth – Several stakeholders noted the importance of carefully managed growth in visitation, making sure that the quality of life for residents is not negatively impacted.

Private Land – The lack of public access to potential tourism assets, particularly waterfront locations, presents challenges for future development planning in Clay. While some of this land is attainable by the County, a large amount is entirely inaccessible for public acquisition or use.

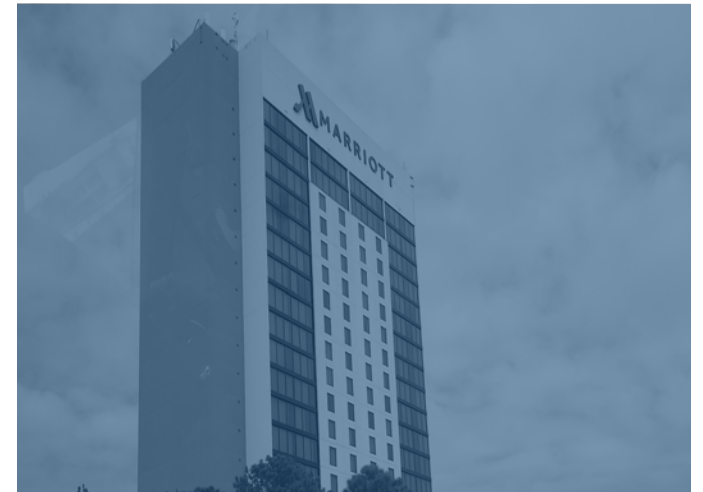
Meeting/Event Space – The County, and surrounding metro area, have been commonly cited as having limited meeting and event space. Meetings and events can be strong drivers of visitation to a location, supporting restaurant, retail, and lodging spending.

Awareness of Assets – Neither residents nor visitors have a strong awareness of the County’s various tourism assets, leading to a lack of local ambassadors highlighting the County’s strengths.

Lack of Unique Hospitality Businesses – Stakeholders suggest that Clay County is not reaching its full potential in terms of unique, trend-forward hospitality businesses including restaurants and retail.

Lodging – The location and quantity of hotel and lodging accommodations in Clay County are limited, impacting the ability to attract visitors.

Activities for Young People – A commonly cited challenge for Clay County is a lack of entertainment options for kids, teens, and young adults.



Source: Stakeholder Interviews, 2022.



2. EXISTING ASSETS: Stakeholder Input – Threats

Threats for Clay

Retaining Community Character – Clay’s existing identity, culture, people, and atmosphere are commonly cited as a leading strength of the County. As Clay County pursues growth in its population and visitor levels, a proactive effort to retain a unique Clay quality of life will be important.

Opposition to Tourism Growth – The focus on mitigating the negative impacts of tourism is appropriate. However, overemphasizing this approach could limit opportunities to pursue tourism generating assets and strategies that can benefit the County economy and residents.

Crime – A concern point for stakeholders and residents in growing Clay’s tourism regards a potential increase in crime following Clay’s growth as a County and the expansion of Jacksonville’s metropolitan reach. Safety as a leading focus in the County’s planning efforts can help to address this challenge early on.

Cost of Land – Land prices in Clay County and the State of Florida are on an upward trend that currently shows few signs of slowing. This could present itself as a threat for Clay’s future developments surrounding tourism assets and quality-of-life enhancements for residents.

Competitive Destinations – Outside destinations in the state and nationally have the chance to detract from Clay’s future tourism market capture.



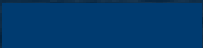
Source: Stakeholder Interviews, 2022.





3

| Benchmarking
Analysis



3. Benchmarking: Introduction

CSL analyzed comparable counties throughout the state (3 counties) and country (3 counties) in order to provide a benchmarking assessment that can inform future Clay County visitor industry development. Counties selected within the state have slightly higher populations than Clay, similar numbers of tourism assets, and higher marketing presence compared with Clay. Counties selected outside of the state are in markets located adjacent to metro areas with strong online presence for tourism assets and brand identity. Counties such as Marion/Ocala County and Rutherford County have focused brand identities; “Horse Capital of the World” and “Sports Capital of Tennessee,” respectively. The smallest compared county is Kenosha County, WI. While smaller than Clay in terms of population, Kenosha County has strong marketing presence and highlights its assets in a focused manner.



Population: 255,410
Brand Identity: Florida’s Historic Coast



Population: 360,210
Brand Identity: Horse Capital of the World



Population: 356,115
Brand Identity: Florida’s Lakeside Escape



Population: 324,139
Brand Identity: The Sports Capital of Tennessee



Population: 203,308
Brand Identity: Rural Heritage and Eco Tourism



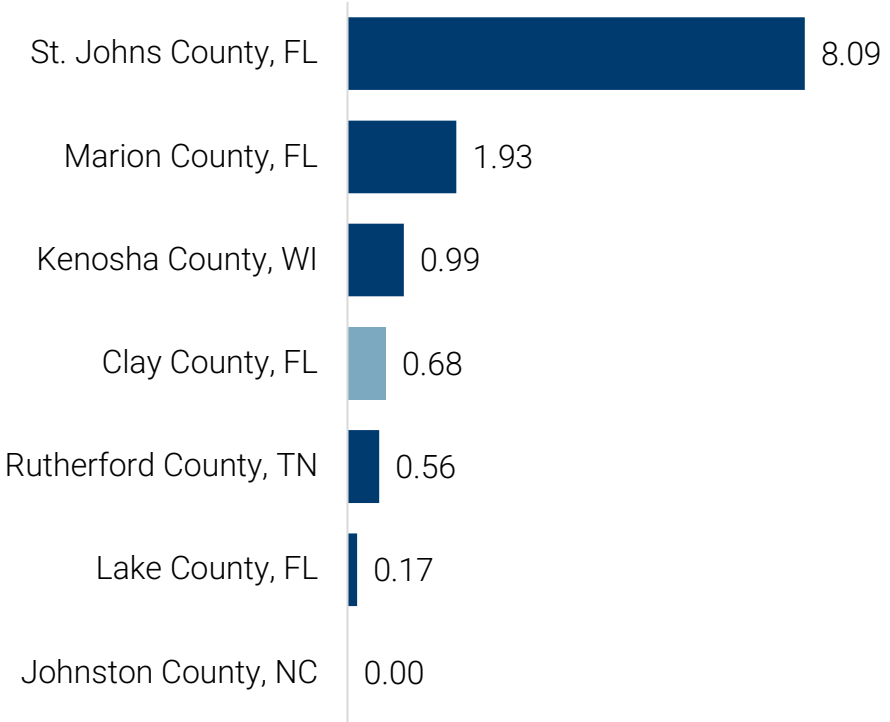
Population: 168,998
Brand Identity: A Historic Harbor Town

Source: CVBs, Google, 2022.

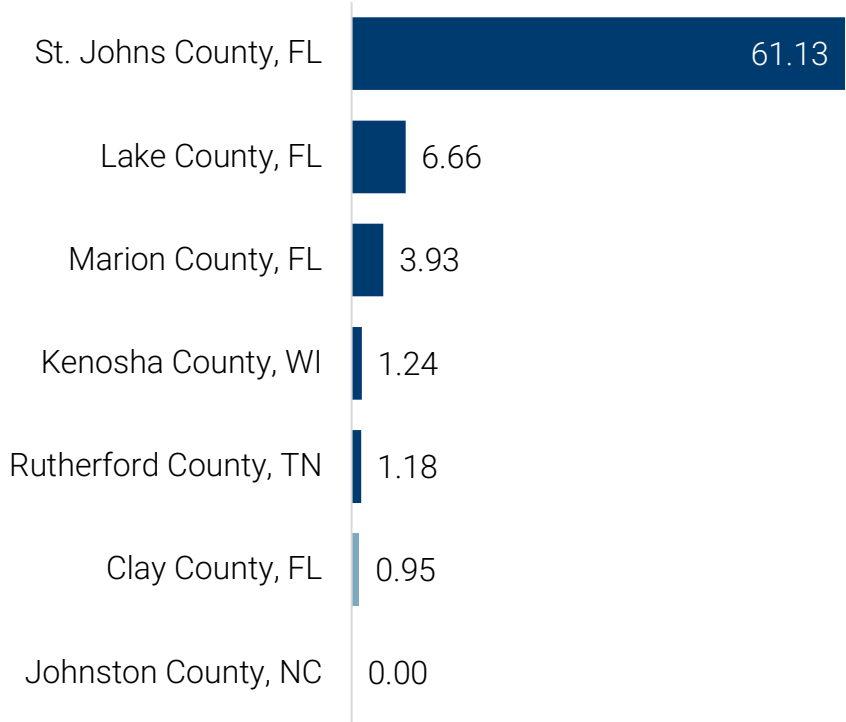
3. BENCHMARKING: Comparable County Analysis

For the comparable county benchmarking assessment, CSL used the tourism site TripAdvisor to analyze the online presence that each respective community has developed surrounding their various tourism assets. For a clearer comparison, the charts presented below take a county's TripAdvisor category score, divide that by the population, and multiply the outcome by 1,000. As seen in the charts below, Clay ranks 4th in Outdoor Activities and 6th in Nature and Parks among the counties reviewed. Clay is commonly cited by residents and stakeholders as being a beautiful location with great parks and outdoor assets. Efforts could be undertaken with relatively low investment by working to educate proprietors of these assets about positioning within in an online marketplace.

Outdoor Activities (Population/TripAdvisor ratings)



Nature and Parks (Population/TripAdvisor ratings)



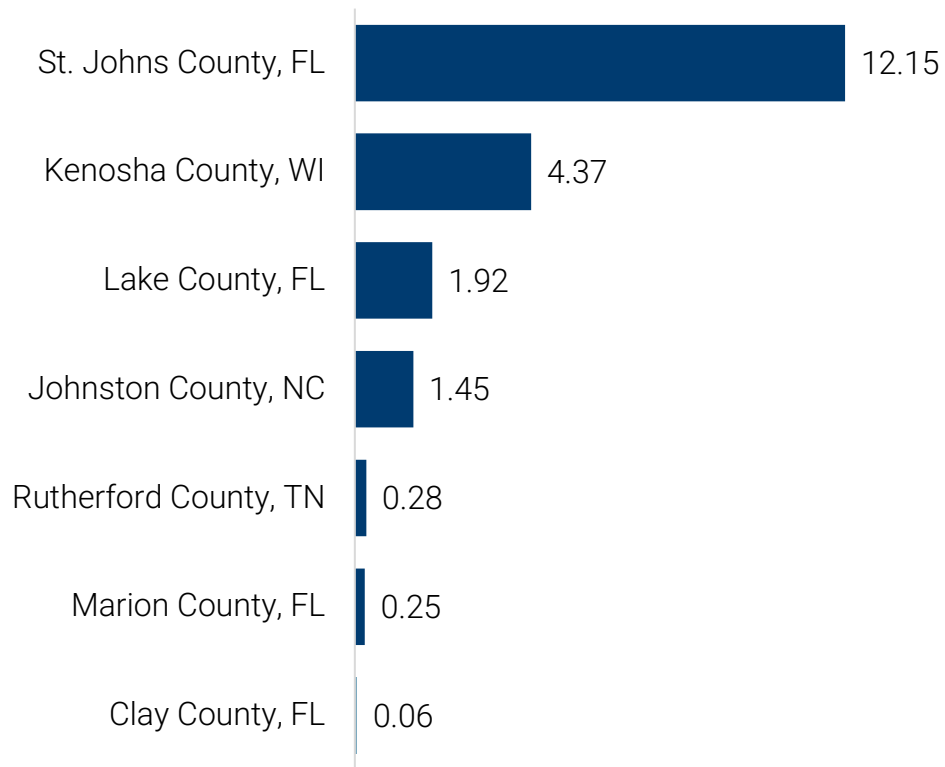
Source: TripAdvisor, 2022.



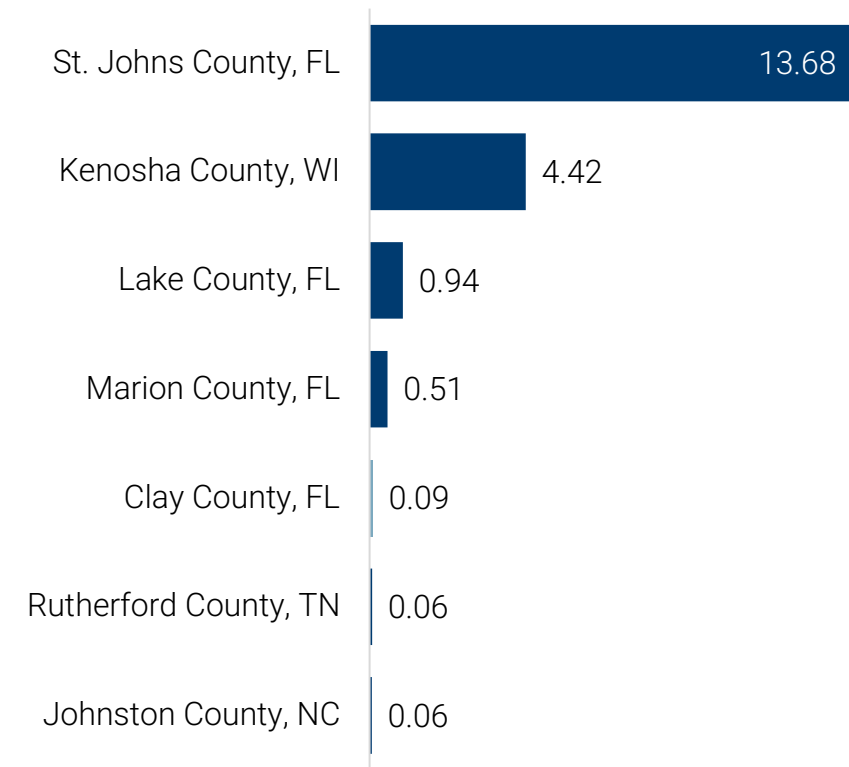
3. BENCHMARKING: Comparable County Analysis

Clay County ranks very low for shopping and nightlife assets. Clay has several unique shopping opportunities, such as Yum – A Southern Market; however, these assets see minimal recognition online. St. Johns County’s most reviewed shopping asset is a chocolate tasting tour, a tourist-oriented shopping experience. Both shopping and nightlife tend to increase as a County’s tourism economy develops; however, addressing these categories with existing assets could speed this progress. Even with the Orange Park Mall, shopping in Clay as reviewed by TripAdvisor users ranks last among the counties reviewed. This likely reflects a low social media focus, and limited retail opportunity throughout the County beyond the Mall. Nightlife (bars, restaurants, etc.) are also recognized limitations to the Clay County hospitality product.

Shopping (Population/TripAdvisor ratings)



Nightlife (Population/TripAdvisor ratings)



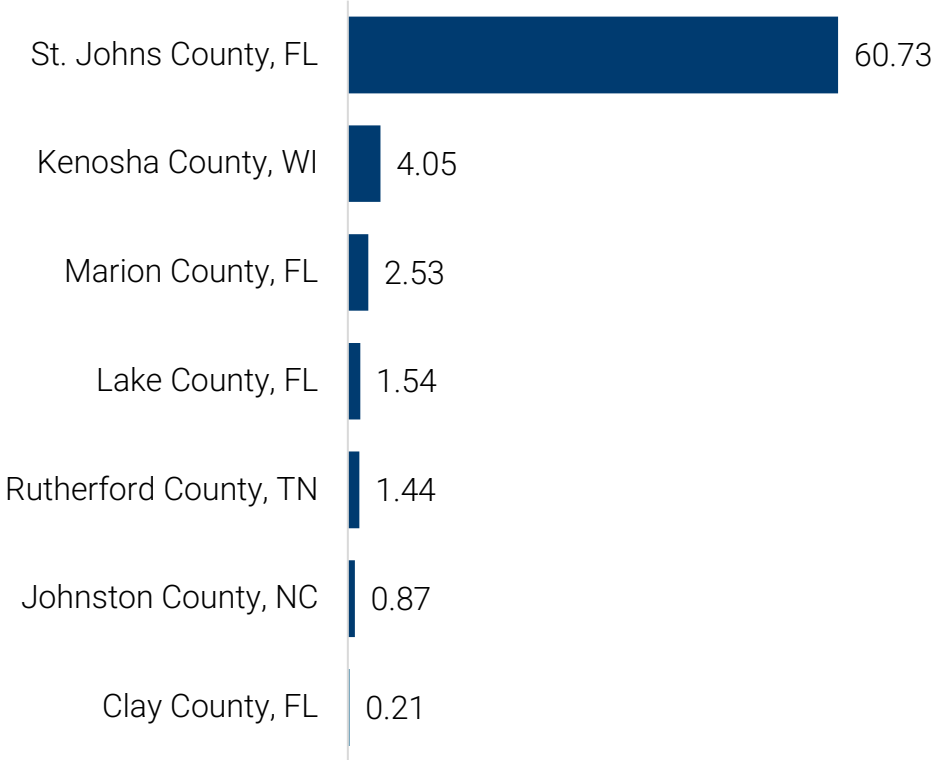
Source: TripAdvisor, 2022.



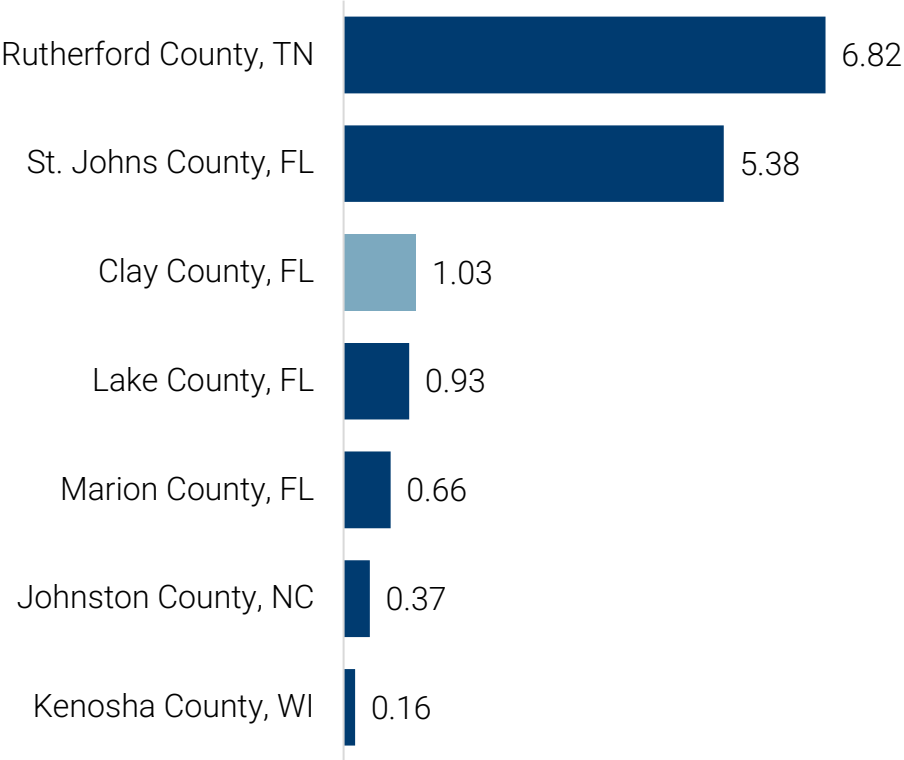
3. BENCHMARKING: Comparable County Analysis

The museum inventory in Clay ranks very low among the comparable market set in terms of TripAdvisor reviews. The existing museums (including the Military Museum of North Florida) offer an important collection of items, but would require investment in technology, space and amenities to achieve a higher profile. Fun and Games assets generally include entertainment activities such as escape rooms, mini golf, arcades, and more. While Clay is ranked 3rd in this category, it has the potential to increase the number of these assets, and the online presence that these assets have, to support the County's tourism.

Museums (Population/TripAdvisor ratings)



Fun and Games (Population/TripAdvisor ratings)



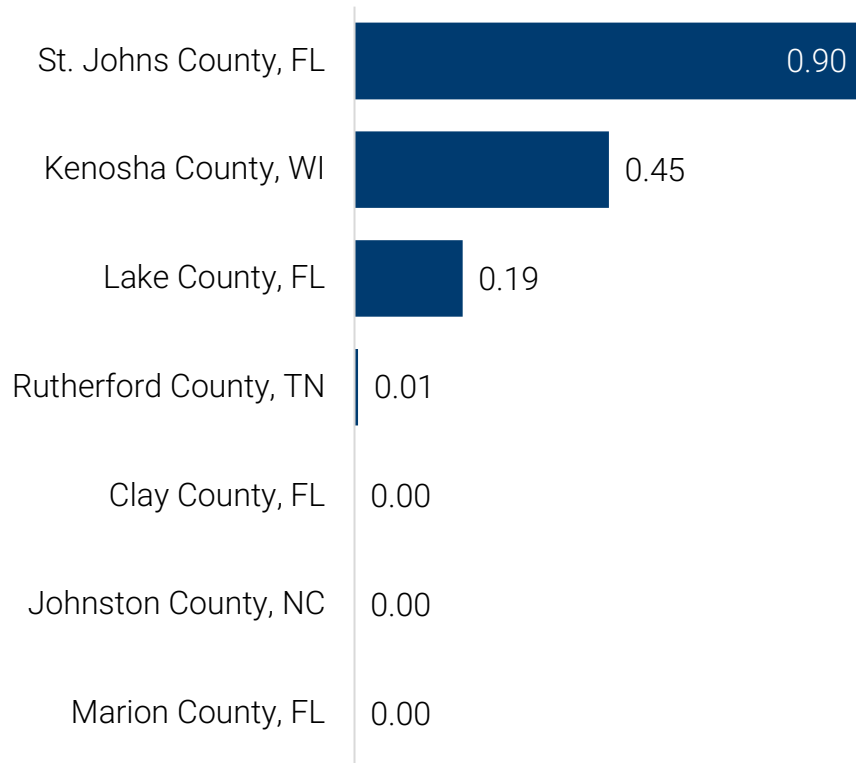
Source: TripAdvisor, 2022.



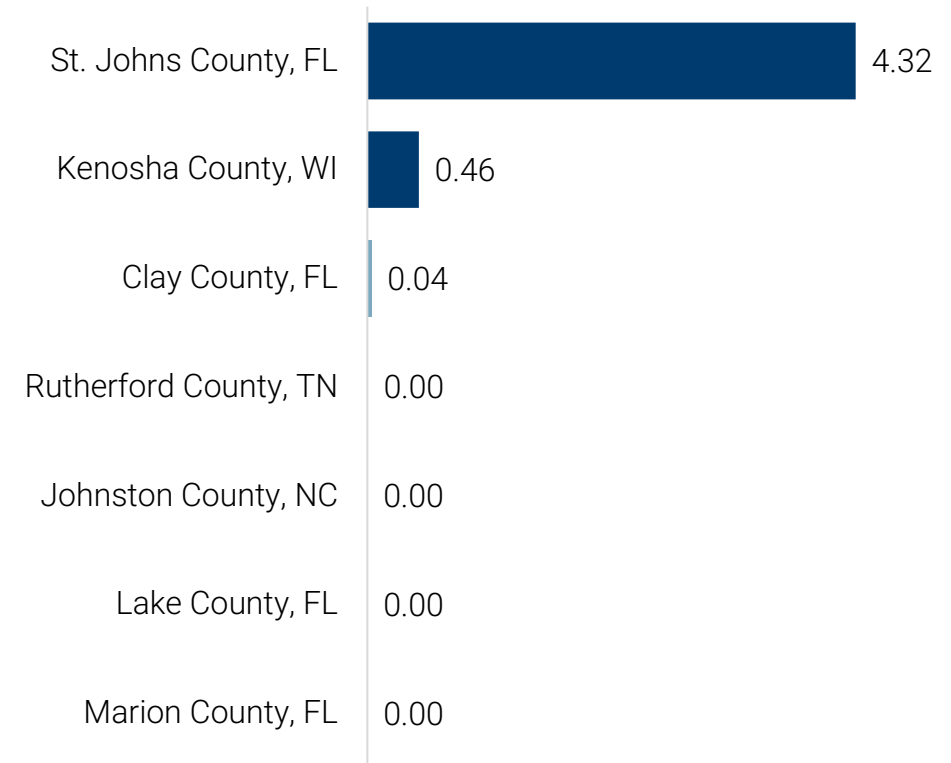
3. BENCHMARKING: Comparable County Analysis

Water and Amusement Parks are typically key attractions within a location or county. There has been interest from several private sector entities in developing some type of lodging/attraction venue in the County. The development of the First Coast Expressway could provide access to developable parcels that could accommodate such a project. These assets can have strong economic benefit with respect to spending and lodging stays. While Clay has a large inventory of natural water assets in the County, it has virtually no presence of Boat Tours & Water Sports options. Creating greater waterfront access within the County by working with the public and private sector, could help facilitate greater water sports/leisure activities.

Water and Amusement Parks (Population/TripAdvisor ratings)



Boat Tours & Water Sports (Population/TripAdvisor ratings)



Source: TripAdvisor, 2022.



3. BENCHMARKING: Comparable County Analysis

Historically a bedroom community for the Jacksonville metropolitan area, Clay County tends to rank low with respect to various attractions, entertainment, outdoor and other amenities that tend to support a visitor economy as well as resident quality of life. As the County-wide population continues a significant growth trajectory, as freeway access improves significantly, and as the broader metropolitan area continues to grow, there are significant near-term and long-term opportunities to develop visitor/resident-benefitting amenities. These can include enhanced water access, unique restaurants, art and cultural programming, hotel/attraction assets, amateur sports venues, outdoor assets, and other projects. The recommendations of the Plan go into detail as to the types of projects that should be supported and provide a preliminary “roadmap” for beginning the planning process.

Trip Advisor Positive Review Comparison by Category

	Fun & Games	Sights & Landmarks	Outdoor Activities	Nightlife	Shopping	Nature & Parks	Museums	Boat Tours & Water Sports	Water & Amusement Parks
Clay County, FL	221	18	146	19	12	205	45	8	0
St. Johns County, FL	1,374	31,151	2,066	3,494	3,103	15,614	15,512	1,104	230
Marion County, FL	239	1,525	694	183	89	1,414	913	0	0
Lake County, FL	330	1,616	60	335	685	2,373	547	0	68
Rutherford County, TN	2,211	1,354	182	21	92	384	467	1	2
Johnston County, NC	75	62	0	12	295	0	176	0	0
Kenosha County, WI	27	208	168	747	738	209	684	77	76
Avg	709	5,986	528	799	834	3,332	3,050	197	63
Avg (no Outliers)	517	797	208	220	319	764	472	14	24
Clay Score vs Avg	-296	-779	-62	-201	-307	-559	-427	-6	-24
Clay Rank (out of 7)	5	7	5	6	7	6	7	3	5

Source: TripAdvisor, 2022.





4 | Community Survey Results



4. COMMUNITY SURVEY: Introduction

Working with Clay County, CSL conducted a survey targeted of more than 500 community residents via various social media channels. The survey received a 97% completion rate, meaning that nearly all respondents took the time to fully answer the ten-minute survey, a positive sign of interest in, and support for, potential tourism initiatives. Their input is useful in informing Tourism Strategic Plan recommendations, as many of these residents often host family or friends in the region and hear firsthand about Clay County's strengths and weaknesses as a destination.

Survey questions covered the following subjects:

- Age and Time lived in Clay County
- The importance of tourism for residents
- How well Clay County is meeting its tourism potential
- Challenges of Clay County regarding tourism
- Ideas and suggestions for Clay's tourism
- Interest levels of proposed concepts; general and by age group

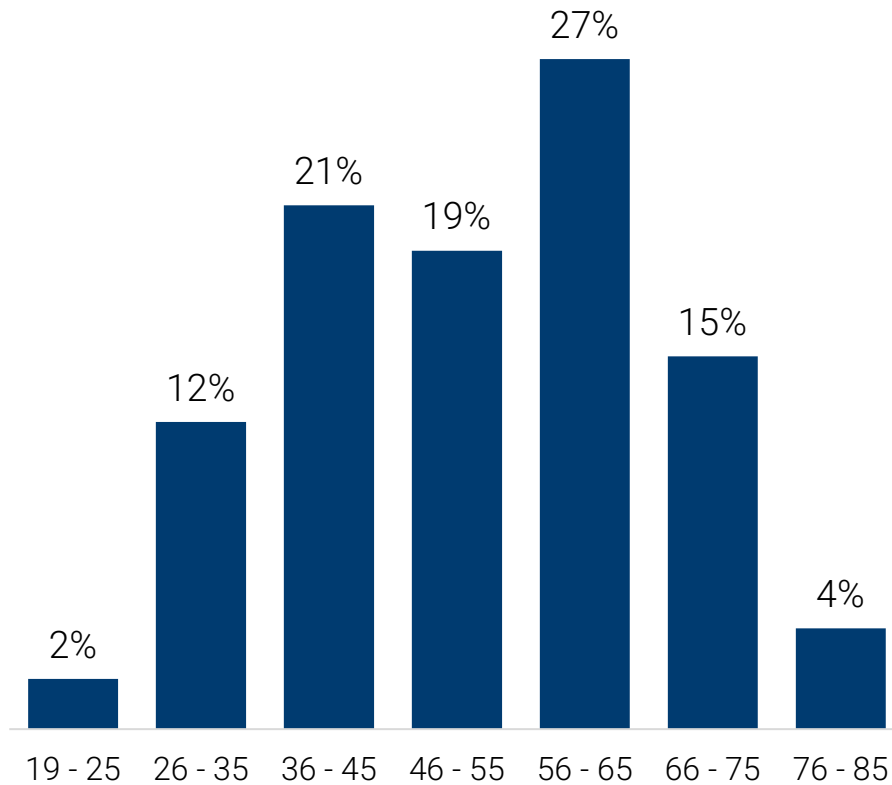
The quantitative and qualitative data generated by this survey outreach are presented and analyzed on the following pages.



4. COMMUNITY SURVEY: Age & Time in Clay

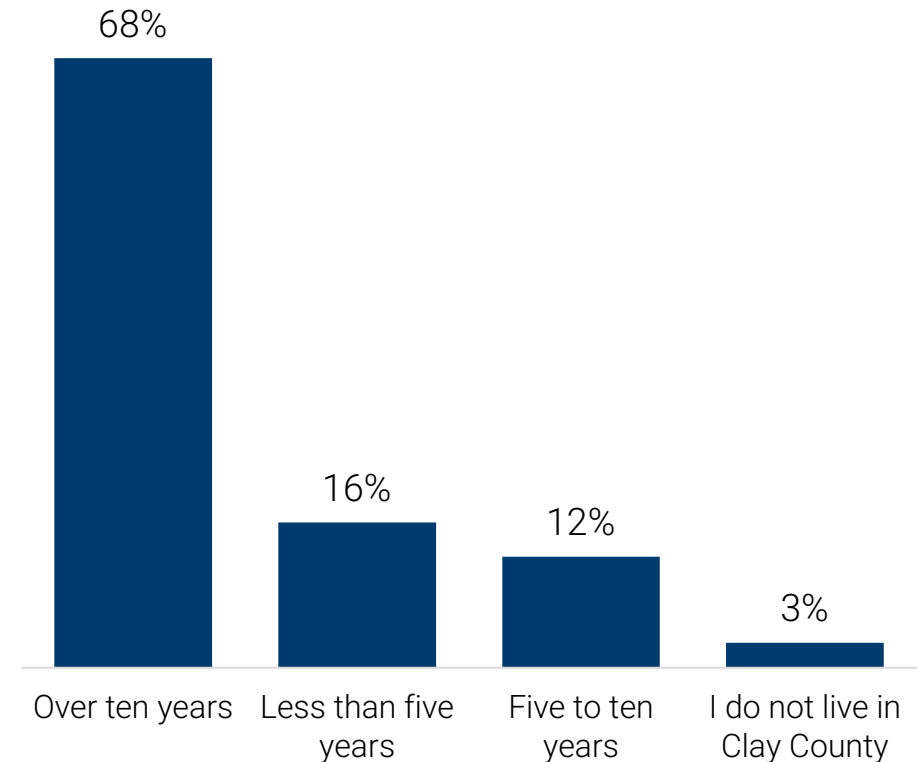
The age of respondents to the survey skewed somewhat older than the population of Clay County. The largest age group represented in the survey is 56-65 years old, with its lowest response rates coming from the 19-25 and 76-85 age groups. Of those that completed the survey, 97% were residents of Clay County, and 68% of respondents have lived in the County for over 10 years. This experience in the destination can often provide helpful insights regarding the history of the area and how elements of the region's past could be leveraged for the visitor industry.

Age of Respondents



Source: CSL Survey, 2022.

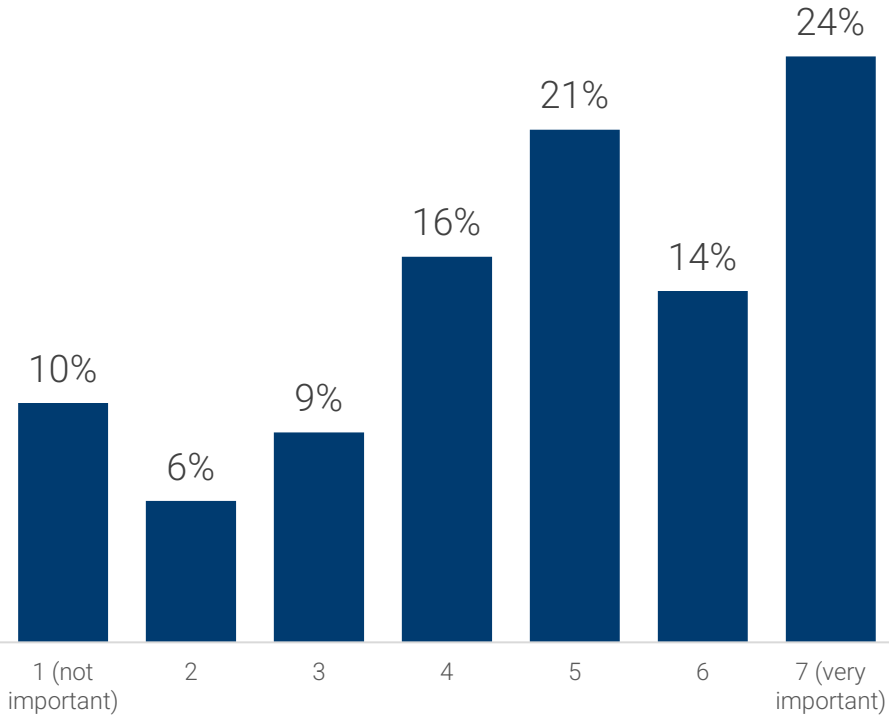
Time in Clay



4. COMMUNITY SURVEY: Perception of Tourism

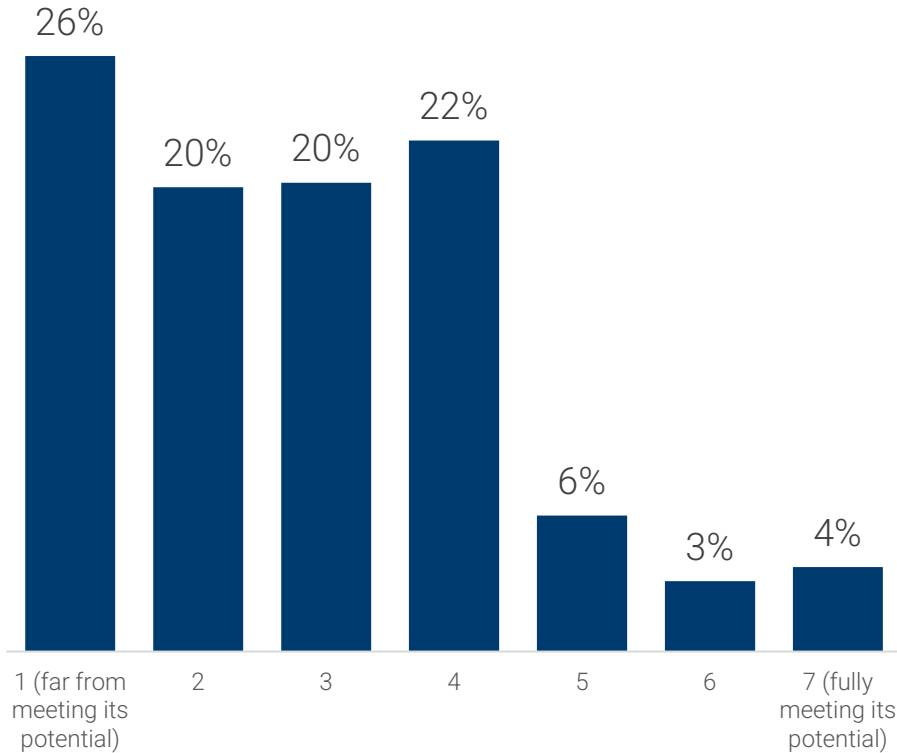
Survey respondents were asked how important they found tourism to be for the overall Clay County economy and how well the Clay County area is meeting its potential as a tourism destination. As shown, visitors tend to view tourism as very important to Clay County, but very few think the area is even close to meeting its potential. This could be framed as an opportunity – with even modest investment, the Clay County destination could be make significant strides in attracting and appealing to visitors.

Importance of Tourism



Source: CSL Survey, 2022.

How Well Is Clay Meeting Tourism Potential

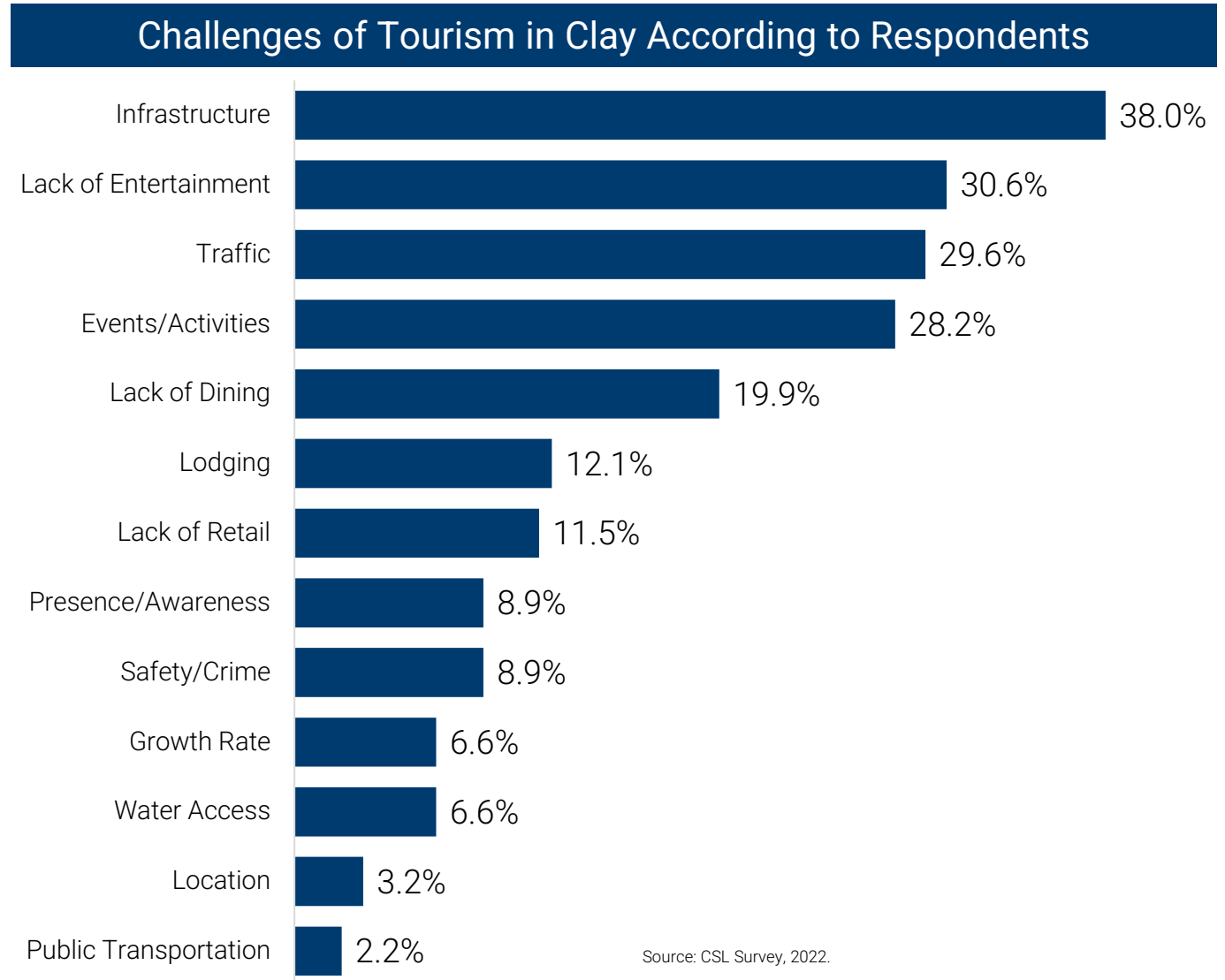


4. COMMUNITY SURVEY: Clay Challenges

In an open-ended context, respondents were asked to share what they see as challenges of Clay County as a visitor destination. The first and third most referenced challenges for residents were infrastructure (38.0%) and traffic (29.6%), respectively. Infrastructure included challenges such as quality of roads, empty developments, organization of developments, public transportation, among others. Like interviewed stakeholders of Clay, respondents see traffic in the County as a major challenge point.

The second and fourth most cited challenges were a lack of entertainment (30.6%) and quality & quantity of events/activities (28.2%). Many of these respondents shared that they go elsewhere to enjoy these types of activities, signifying a substantial amount of dollars being unrealized by the County. Many added that they would like to see more family entertainment centers (like a Dave and Buster's) opportunities to enjoy live music.

Following these categories, respondents saw a lack of dining, lodging, and retail to be leading problems for the County as a tourism location. Many of these deficiencies are addressed as part of recommendations described later herein.



4. COMMUNITY SURVEY: Clay Challenges Quotes

Quotes - Challenges of Tourism in Clay According to Respondents

- “Too many non-recreational businesses at the epicenter of Clay. We need more things to do here. More recreation and entertainment venues would be ideal. I would love more restaurant options, maybe a couple of boutique clothing stores, bars, bakeries, etc. Places where bands could perform would be amazing!”
- “We seem to be a drive through town. Minimal activities for a visitor.”
- “Not much to do during the week, we need more access to water, some sort of fishing area/park.”
- “Lack of entertainment venues, especially for children/teens/young adults and people without boats.”
- “Difficulty finding information on places to go, things to do.”
- “Lack of advertising of what the county has to offer. We are not using social media to our advantage.”
- “Road quality. Parts of downtown need to be revitalized. Growth in the county creates need for more infrastructure.”
- “Frankly, there is not a lot to do here outside the events at the fair. Although there are SOME good eating spots, there is just not a lot of high-quality food here other than chain restaurants.”
- “The revitalization of downtown is needed; shopping and more upscale restaurants and a welcome center.”

Source: CSL Survey, 2022.



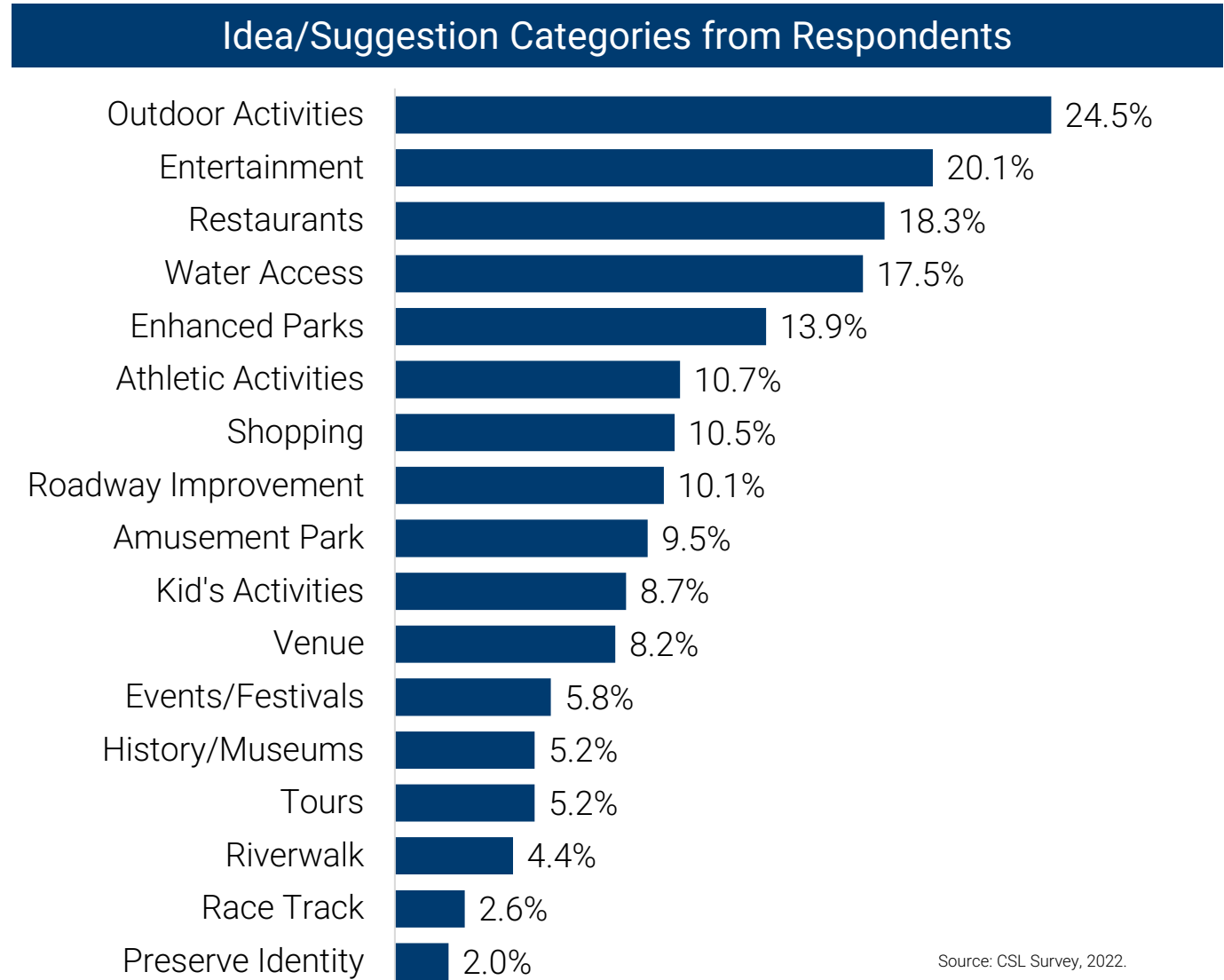
4. COMMUNITY SURVEY: Tourism Ideas for Clay

As an open-ended question, respondents were asked to share their personal ideas for major attractions in Clay County that they felt would make the County a better place to live, work, and visit.

The leading suggested category among respondents was outdoor activities (24.5%). Additionally, residents often desired water access (17.5%) and enhanced parks (13.9%). These results support stakeholders' and residents' positive perceptions of Clay's natural, ecotourism assets yet suggests a high level of importance among respondents to better leverage these assets as part of Clay's tourism offerings..

Respondents also commonly referenced the development of many new tourism-related businesses, including entertainment options (20.1%), restaurants and dining options (18.3%), and shopping options (10.5%). The addition of options within these categories could likely elevate quality of life in the area while also enhancing its appeal as a visitor destination. Additionally, these assets would benefit the County by attracting more tax revenue from spending by both residents and visitors.

Additional categories suggested include athletic activities (10.7%), improvements to roadways (10.1%), an amusement park (9.5%), and more access to kids-oriented activities (8.7%).



Source: CSL Survey, 2022.



4. COMMUNITY SURVEY: Ideas for Clay Quotes

Quotes - Idea/Suggestion Categories from Respondents

- “Would like to see me more of an Old Florida downtown feel with specialty shops and restaurants even better if it was on the river.”
- “I would love to see some more public water access on Clay's waterways. There are 30+ miles of waterways that are nearly untapped.”
- “I would like to see some quality restaurants with a great atmosphere and healthy food.”
- “Boat tours on the St. Johns River which has a lot of history. Tours of the historic areas of GCS, Middleburg, and Orange Park.”
- “More family friendly activities, more stores especially in the Lake Asbury area.”
- “More horseback riding, cycling, walking and hiking trails to enjoy the outdoors. Events like the Highland Games Festival encourage and bring numerous visitors to the area.”
- “Roadway improvements are seriously needed before we increase traffic for venues that will bring people in to enjoy any attractions.”
- “Waterfront hotels, shopping and dining. Capitalize on the incredible golf and seize the opportunity that the southern rock history of Clay County presents.”
- “Restaurants on the water, small and fun watercraft rentals such as paddle boats or small motorized novelty boat.”
- “Use of existing buildings and spaces for new venues, restaurants, shopping, etc. It would be nice to have more venue spaces in the county for events like dances, banquets, etc.”

Source: CSL Survey, 2022.

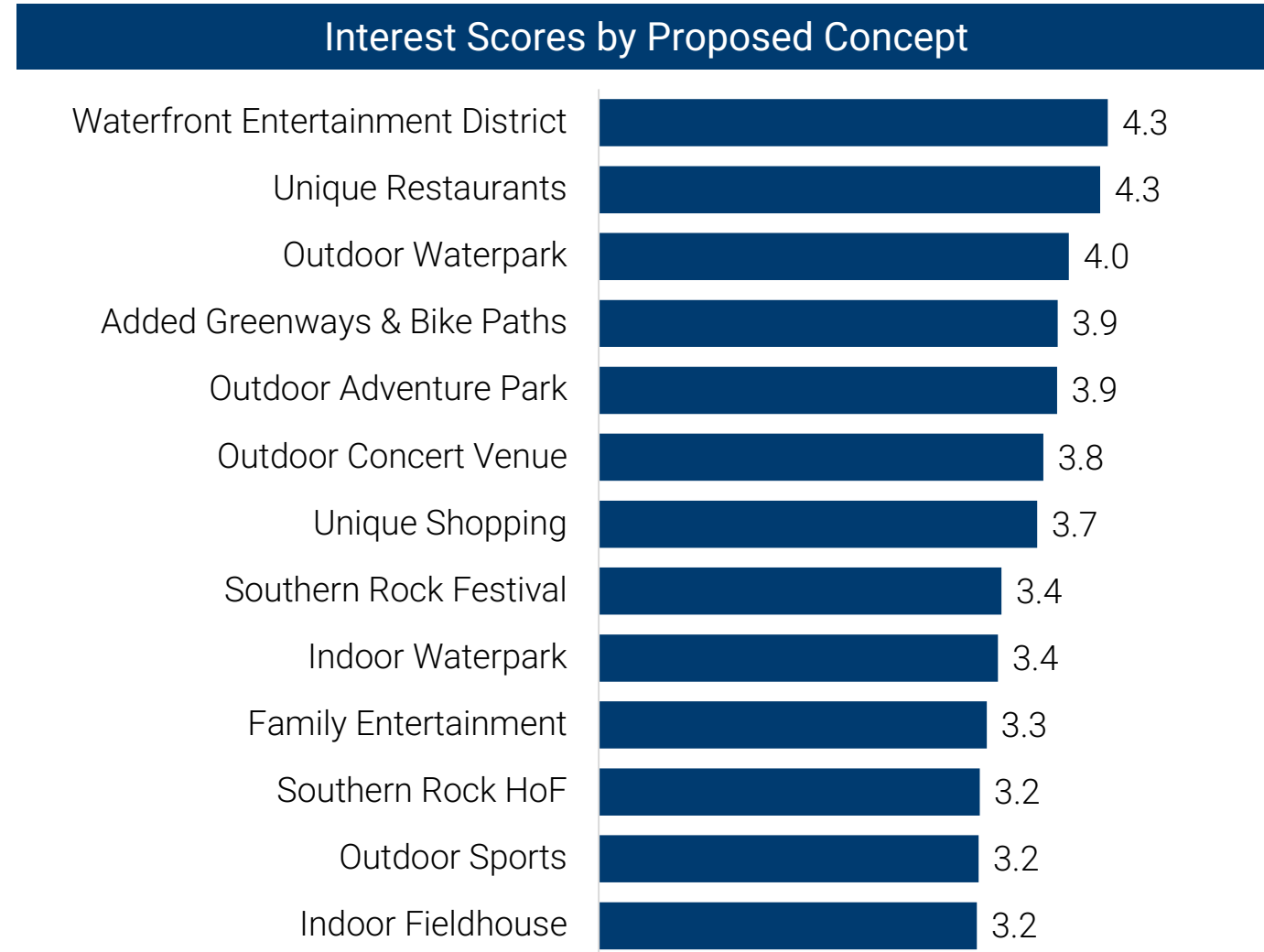


4. COMMUNITY SURVEY: Interest in Concepts

CSL also provided respondents with a list of predefined, potential tourism assets for the County, and asked them to rate their levels of interest in attending these proposed attractions with their friends and families. Residents were asked to rate these concepts on a scale of 1 (very low appeal) to 5 (significantly appealing).

On average, all concepts received a score above three. The highest scoring concept for residents was the idea of a waterfront entertainment district (4.3). While this concept would likely be a long-term and capital-intensive project, its positive impact on quality of life and visitation would be substantial. Increasing the inventory of unique restaurants in the County ranked second among respondents (4.3). Many residents added that they do not feel that Clay currently has an adequate restaurant base.

The subsequent four concepts are each outdoor activities: an outdoor waterpark (4.0), added greenways and bike paths (3.9), an outdoor adventure park (3.9), and an outdoor concert venue (3.8). These concepts highlight residents' interest in having more opportunities to enjoy Clay County's outdoor assets.



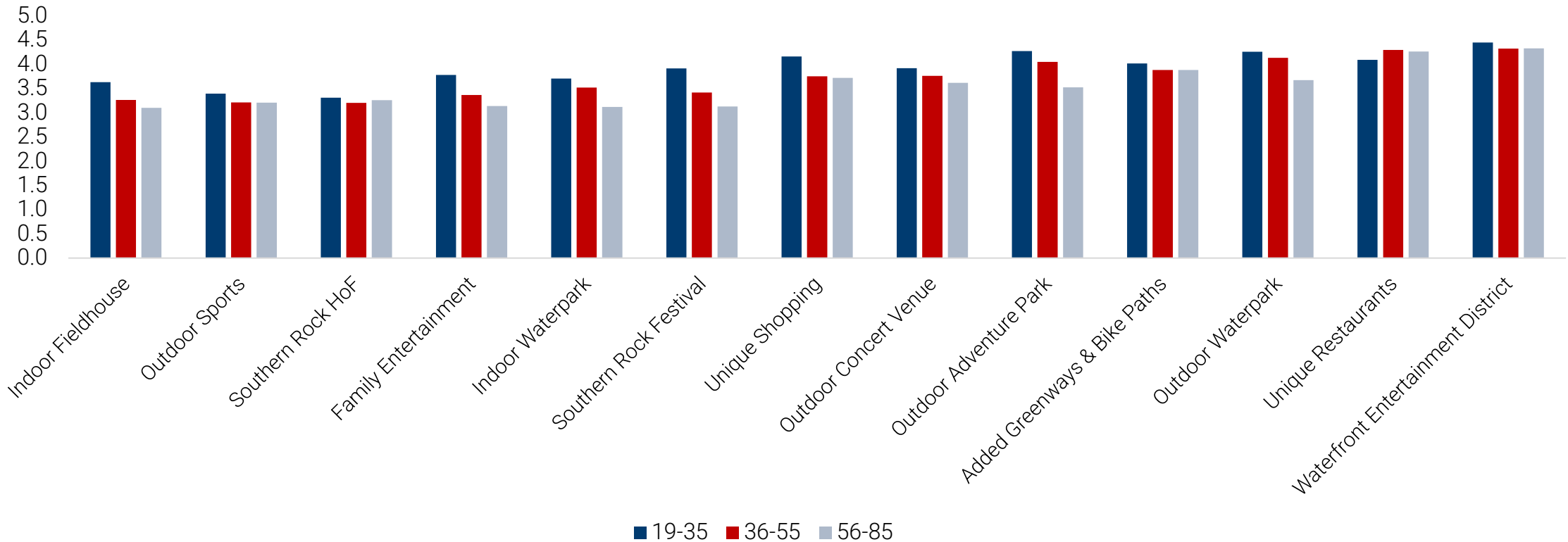
Source: CSL Survey, 2022.



4. COMMUNITY SURVEY: Interest by Concept by Age

The exhibit below details the concept scorings segmented by age group. In general, 19-35 year old respondents expressed highest interest in each of the concepts presented. The concept of unique restaurants in the County was the only proposed idea in which 19-35-year-olds displayed lowered interest compared to other surveyed age groups. The greatest disparity of interest levels between age groups for any concept was for the idea of an outdoor adventure park. The 19-35-year-old age group displayed higher interest than the 36-55 group, who displayed higher interest than the 56-85 group. Other concepts that scored relatively high with the younger age group include unique shopping options, southern rock festival, family entertainment and indoor fieldhouse.

Interest Scores by Proposed Concept by Age Group



Source: CSL Survey, 2022.



5

The Non-Local Perspective

5. NON-LOCAL PERSPECTIVES: Introduction

It is critical to consider the perspective of the end customer - the visitor industry stakeholders who reside outside of Clay County and make important decisions regarding event planning, tournament organizing, real estate development, and tour operating. At the same time, national travel and destination marketing organization (DMO) trends will have important implications for the future of the visitor industry in Clay County. This Chapter begins with input provided by regional experts who were interviewed as part of this Study, followed by a review of the national macro trends that can influence Tourism Strategic Plan recommendations.

CSL interviewed a broad cross-section of visitor industry stakeholders to gather information regarding Clay County's potential in the visitor and events industries, unique opportunities to grow the County's visitor base, perceptions of Clay within the broader Northeast Florida region, and the "gaps" within Clay that may negatively impact its success as a destination. Brief descriptions of each of the groups contacted are provided below, followed by a summary of feedback on the following page.



Real Estate Developers: Commercial real estate development firms such as CBRE, as well as private developers of resorts, theme parks, family entertainment centers and other attractions.



Meeting/Event Planners: Planners and site selectors for corporate, social, association and independent meeting events.



Concert Promoters: Promoters of concerts, comedy shows, family shows, and other ticketed entertainment events.



Sports Organizers: Youth and amateur sports tournament planners for a variety of sports facility user groups, including baseball, softball, soccer, lacrosse, basketball, volleyball and dance/cheer competitions.



Visit Jacksonville: Convention and visitor's bureau for the Greater Jacksonville metro, offering unique insights as to the "gaps" and opportunities for visitor industry development in the broader area.



Cultural Council of Greater Jacksonville: The official arts agency for the City of Jacksonville, offering important input regarding the history and potential of developing the arts as a tourism asset in neighboring Clay County.



5. NON-LOCAL PERSPECTIVES: Regional Experts



Real Estate Developers

Interviewed developers were asked to provide their input on the trajectory of future Clay County growth, with a focus on the recent development boom in Northeast Florida.

- **First Coast Expressway:** Representatives from CBRE, attraction developers and hoteliers acknowledged that the First Coast Expressway's route through Clay will greatly improve visitor access to points with high visitor appeal, including Spring Park in Green Cove Springs, and will improve the connection to the adjacent St. Johns County.
- **Future Nodes of Development:** Real estate professionals agreed that there will likely be private sector demand at several "nodes" for mixed-use development in the future, including high-density residential, office and retail along and near the First Coast Expressway.
- **The Next Young Family Hot Spot:** Attraction developers noted that North Florida's growth is resembling Nashville's recent growth, and that young families with above average income moving to the area are an important target market for entertainment developers.



Visit Jacksonville

Visit Jacksonville sales officials were interviewed to discuss the greater Jacksonville region and the potential for Clay County to gain greater visitor industry market share through targeted destination investment.

- **Leisure Success:** Officials reported that weekend hotel occupancy and average daily rate (ADR) were still setting record-highs, and that the region's leisure visitation has remained high since the recovery from COVID.
- **Unrealized Outdoor Adventure Opportunities:** None of the nearby municipalities truly "own" the St. Johns River, and a signature waterfront development that provides access for activities such as kayaking and canoeing would likely become an iconic visitor destination for the entire region. Further, a robust inventory of parks exist throughout Duval, Clay and St. Johns Counties, but there is no "go to" destination to experience the outdoors in the region, such as a family-focused outdoor adventure park.
- **Events Industry Opportunities:** Beyond the Osborn Convention Center in Jacksonville, the broader area lacks sizable ballroom spaces for larger conferences and meetings. At the same time, youth sports tourism may have significant potential for growth in the region as many outdoor facilities are controlled by private clubs and there is a general lack of indoor facilities.



Cultural Council of Greater Jacksonville

Leadership of the Cultural Council were interviewed to collect their input regarding Clay County's opportunities to create visitor engagement with the arts and to identify cultural product development opportunities that would be unique and authentic to the region.

- **Arts Council Development:** Officials were highly supportive of Clay County forming its own arts council and recommended using Duval and St. Johns Counties' organizations as examples.
- **Clay's Arts Scene:** Clay has a strong reputation in the arts due to its history and existing base of local artists, including its reputation as an important Southern Rock destination. The base of community artists has supported the success of many of the arts events hosted in the region, and opportunity likely exists to further build on this success.
- **Public Art Program:** Arts Council officials recommended the development of a public art program to beautify visitor-oriented areas in Clay as well as future mixed-use developments.
- **Celebrate Augusta Savage:** Ms. Savage, a famous sculptor known for her contributions to the "Harlem Renaissance" was born and raised in Clay County. Her art, inspired by her life and work could serve as important thematic elements for a public art program.

5. NON-LOCAL PERSPECTIVES: Regional Experts



Meeting/Event Planners

Meeting and event planners who are members of the North Florida chapter of Meeting Planners International were surveyed to determine their interest in existing and/or potential new event spaces in Clay County.

- **Lack of Event Space Options:** As noted by Visit Jacksonville, meeting planners explained that the greater Jacksonville area lacks large ballroom spaces to accommodate larger food functions and general sessions.
- **Material Interest:** Forty-five out of the 120 events represented by the ten planners interviewed could be potential users of Clay County event spaces. These events typically feature between 200 to 500 attendees.
- **Potential for Existing Facilities:** Interviewed planners were not very familiar with many of the facility options in Clay County, though they expressed interest in using the Club Continental as a host venue for smaller 50- to 100-attendee events in the future.
- **Resort-Based Event Space:** Several planners (particularly those that plan 20+ events annually) spoke to the significant opportunity that a resort/attraction property would have to attract group business in the greater Jacksonville market. A Clay County-based resort/attraction venue would generate significant interest among those interviewed.



Sports Organizers

Youth and amateur sports tournament organizers were surveyed to discuss their interest in organizing events in Clay County and to describe their ideal host sports facilities.

- **Outdoor Facility Date Availability:** Organizers of soccer, lacrosse, baseball, softball and other outdoor sporting events explained that the greater Jacksonville region has some concentrations of outdoor sports facilities that are conducive for hosting tournaments, but that many are run by local sports clubs who often reserve these fields throughout much of the year for their own games and practices.
- **Lack of Indoor Facilities:** As noted by Visit Jacksonville, the Jacksonville area, and Northeast Florida, lacks sizable indoor event spaces. Many basketball and volleyball tournament planners throughout the state and region would like to see a new 6+-court space added to the market.
- **Untapped Potential for Clay:** Though some organizers were unfamiliar with Clay County, many like the market's affordability, safety, accessibility and central location within the state, and would very likely rotate one or more events to the destination in the future should their ideal facilities be provided.



Concert Promoters

Concert promoters were asked to comment on Clay County's potential to host touring concerts, comedy acts, family shows and other performances should suitable event facilities be developed.

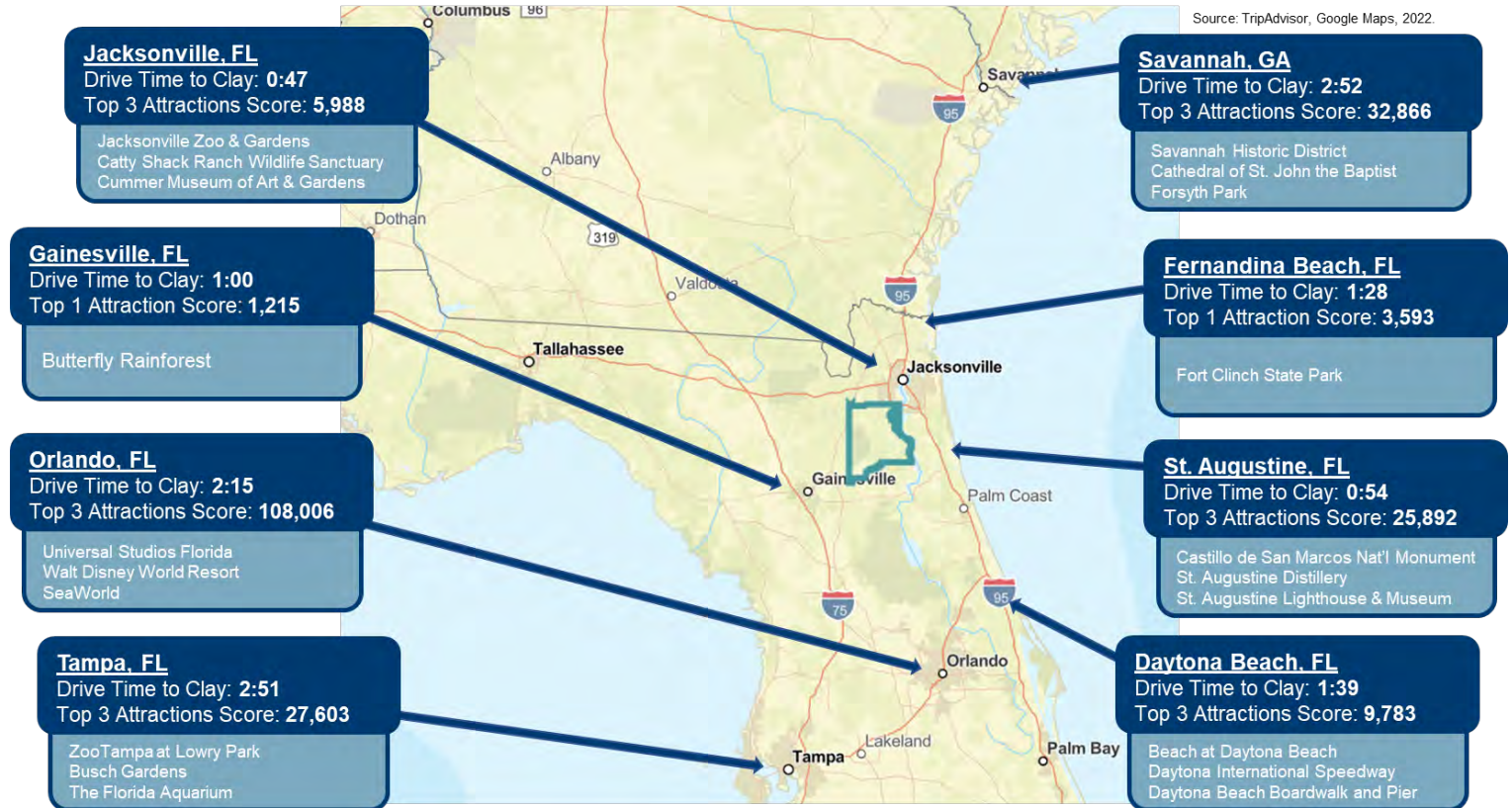
- **Crowded Venue Market:** Though some local stakeholders would like to see the development of a destination amphitheater in Clay, regional promoters highlighted Daily's Place in Jacksonville and St. Augustine Amphitheatre as two of the regions most popular venues. Their presence likely would diminish the potential event mix of a traditional amphitheater in Clay County. However, some promoters thought that potential might exist to develop a more modest-size venue that would host mainly local performances as well as festivals.
- **Celebrating Southern Rock:** Promoters noted that a smaller, less capital-intensive amphitheater with a stage and festival lawn could host a bevy of existing and tribute Southern Rock acts, in addition to some classic rock and up and coming country acts. Their utilization estimates for the venue ranged from 12 to 16 concerts per year, which is low relative to competitive amphitheatres in the area but would still have a material economic impact for the region. Promoters also suggested that Clay County add smaller live music venues to help build out a live music ecosystem in the destination.

5. NON-LOCAL PERSPECTIVES: The Hub-and-Spoke Model

Many non-local stakeholders also commented on Clay's unique opportunity to serve as a "hub" destination within a hub-and-spoke regional destination model. With its affordable hotels and relatively central location, the market could be a cost-effective base of operations for Florida families or fly-in domestic visitors that take day trips to regional attractions. With added attractions, restaurants, events and other experiences, the destination could offer a highly appealing value proposition as the center point of multi-day Florida excursions, and Clay County Tourism could develop suggested multi-day itineraries to be featured on their website and social media.

As shown in the adjacent exhibit, drivable destinations with significant visitor industry assets include Jacksonville (Jacksonville Zoo & Gardens, Catty Shack Ranch Wildlife Sanctuary), Gainesville (Butterfly Rainforest), Savannah (Savannah Historic District), Fernadina Beach (For Clinch State Park), Orlando (Universal Studios, Walt Disney World, SeaWorld), St. Augustine (Castillo de San Marcos National Monument, St. Augustine Distillery), and Daytona Beach (Daytona Beach Boardwalk and Pier).

Non-local interviewees described a cost-conscious family itinerary that could include a three-night stay in Clay County, with one night at Camp Chowenwaw and two nights at a Clay hotel. Daily experiences could feature visits to the parks and Food Truck Friday in Clay on day 1, a visit to Jacksonville Zoo & Gardens on day 2, and trip to tour St. Augustine's historic assets on day 3. A variety of other itineraries could also include the thrilling entertainment experiences in Orlando and Tampa.



5. NON-LOCAL PERSPECTIVES: Travel Trends

The market success of any tourism-related Strategic Plan can be partially attributed to broader industry characteristics and trends. In order to assess the current and future strength of the market regarding visitation to any tourism-related investments in Clay County, it is important to evaluate prominent and emerging trends from a national perspective. The adjacent exhibit illustrates the “top five” travel trends that are most relevant to Clay County’s future in the visitor industry.

An important trend highlighted as part of this Plan is the rise in outdoor adventure travel. The National Park Services reported a 71 percent boost in bookings at U.S. National Parks in 2021, and Grand View Research anticipates global spending on outdoor adventure travel spending to grow to nearly \$1.1 trillion by 2030, representing a 15 percent increase from today’s spending. Outdoor adventure will only become a more important mainstay in the tourism economy going forward, therefore it will be important to plan for outdoor- and eco-related product development as part of the Tourism Strategic Plan.

Other primary trends listed essentially show a significant opportunity for smaller drive-in destinations following the impacts of the pandemic. Smaller, “off-the-beaten path” destinations have recently experienced increased visitation from major metropolitan areas throughout the country. In fact, hotel bookings within 1 hour of travelers’ homes grew by 18 percent in 2021, and 64 percent want their travel spending to directly support small local businesses in the communities they visit. Destinations such as Clay County can benefit from this trend with development of appealing tourism product. The uniqueness and authenticity of these types of markets represent much of their appeal, so it will be important to identify tourism products that would be unique to Clay County, and not replicative of other destinations in the Jacksonville metro area or Northeast Florida.

- 

Outdoor Adventure

 - 71% boost in bookings at US National Parks in 2021.
- 

Short Road Trips and Staycations

 - Hotel bookings within one hour of home grew 18% in 2021.
- 

Impromptu Travel

 - 79% of travelers indicated booking their trip within 14 days of the trip in 2021; up from 24%
- 

Using Technology

 - 83% of travelers prefer to book trips completely online.
- 

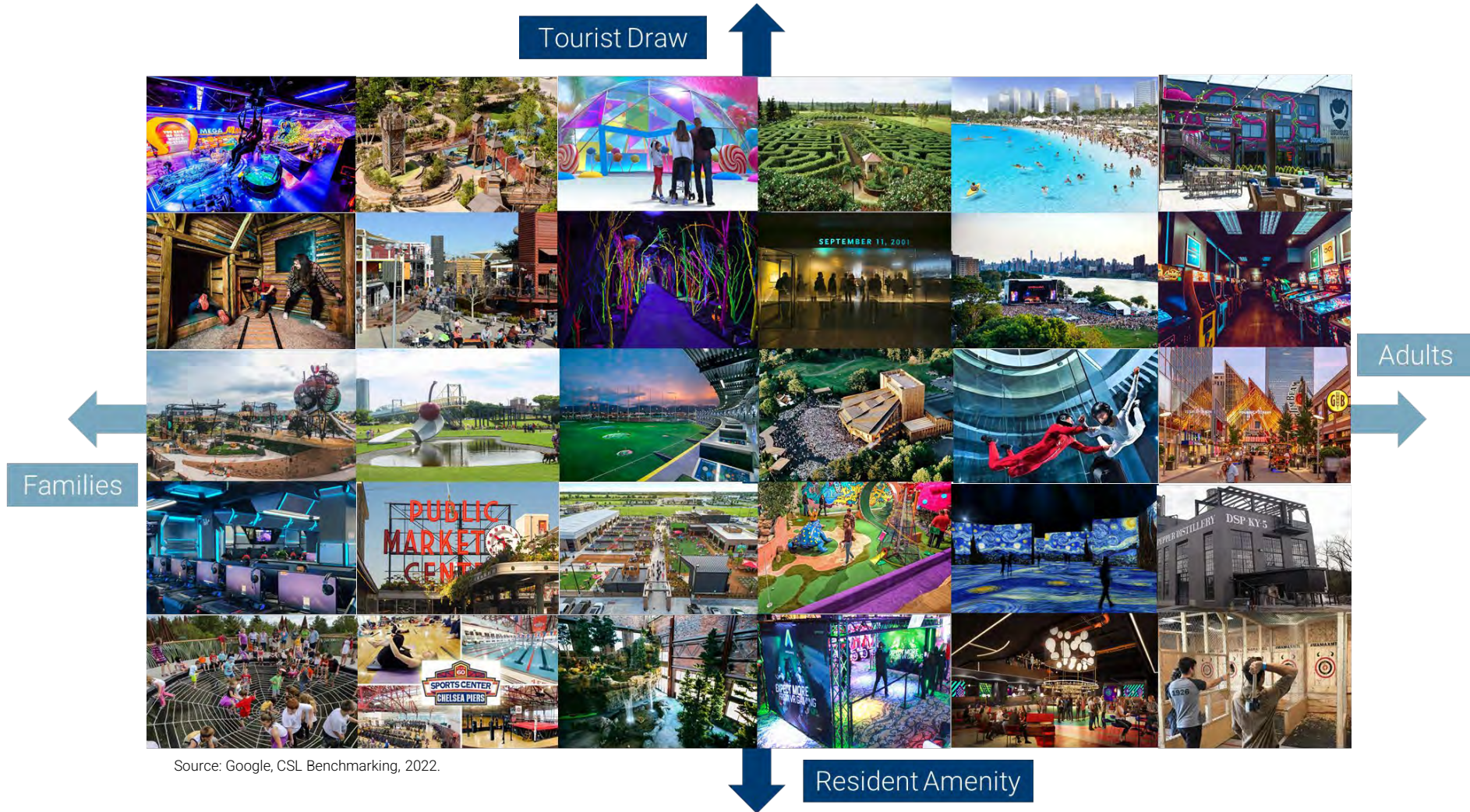
Supporting Local Business

 - 64% of travelers want their travel spending to go to the communities they visit.

5. NON-LOCAL PERSPECTIVES: Entertainment Trends

As highlighted by stakeholders and respondents to the Community Survey, Clay County currently lacks activities for younger travelers and families. To improve the draw of any destination, and to maximize the impact of visitation through extending the length of stay, it is critical to offer a variety of highly appealing forms of entertainment for all ages. In recent years, CSL has been monitoring business and concept development trends in the leisure and entertainment industries. The adjacent graphic shows the wide cross-section of exciting attraction concepts nationally, segmented by those with family vs. adult appeal and those with tourism vs. resident appeal.

Some emerging family and location-based entertainment concepts that could be considered in Clay County include pickleball bars, shuffleboard breweries, mini golf experiences, batting cage bars, and other such concepts. This list is further leveraged to support commercial development recommendations presented later herein.



Source: Google, CSL Benchmarking, 2022.



5. NON-LOCAL PERSPECTIVES: CVB/DMO Inputs



To gather perspective regarding Clay's potential growth as a visitor destination, CSL conducted in-depth interviews with leadership of the DMO's that were included within the previous Benchmarking Analysis. The directors from Rutherford County, (TN), Marion County, (FL), and St. Johns County, (FL) provided important insights regarding the growth they have experienced as destinations, both in the short-term and over the long-term, as well as the tactics they have employed to manage this growth and balance it with the demands and concerns of their local resident base. Key takeaways and recommended initiatives resulting from these conversations are summarized below.



- **Determine** your primary attributes and focus on leveraging those for a long-term branding plan. In 2014, Rutherford County Tourism trademarked the title of "Sports Capital of Tennessee," and decided to focus on youth sports and catering to visiting families and their young athletes. Marion/Ocala County was labeled "Horse Capital of the World" in 2007.



- Meet hospitality business owners face-to-face and **listen** to their needs. Marion/Ocala County addressed opposition to their tourism efforts by meeting with those worried about "over tourism" face-to-face to listen to their concerns and why they had them. This prompted those detractors to feel heard and that their issues are being addressed directly.



- **Welcome** residents to visit and share their opinions and problems and engage them using online platforms. Their input should be included in all decisions made. St. Johns County invites a broad cross-section of the community to their "state of the tourism industry" event and welcomes them to share any opinions they have on tourism.



- **Educate** residents of the ways tourism benefits them directly. Tourism injects new dollars into the economy, thereby reducing the tax burden on residents. It also supports the development of attractions and amenities that double as quality-of-life benefits. Marion/Ocala continually educates residents and stakeholders of the various benefits they receive from tourism such as tax relief and money to be used on infrastructure. St. Johns County teaches residents about the impact tourism has on their favorite parts of their County, with leadership stating that "your favorite restaurants could not be adequately supported without spending from visitors."



- Having a **point of engagement** for the destination marketing team, such as a brick-and-mortar visitor center or tourism-focused kiosks at major events, helps showcase the visitor industry both to visitors and residents. Rutherford County has pop-up tents at events and hands out goody bags with visitor info handouts. St. Johns has three different visitor centers around the County.



Source: CVB Interviews, 2022.

A long wooden pier extends from the foreground into a calm body of water. The pier is made of dark wood and has railings on both sides. In the distance, there are other smaller piers and a small structure on the water. The sky is filled with soft, grey clouds. The overall color palette is muted, with various shades of blue and grey.

6

Recommendations

6. RECOMMENDATIONS: Overview

Based on information and analysis presented throughout the previous Chapters, we designed the recommendations for the Tourism Strategic Plan to enhance and manage the visitor industry in Clay County. Recommended initiatives have been categorized into the following seven primary focus areas:

- A. **Amateur Sports:** supporting youth and amateur sport tourism development through targeted marketing and facility development.
- B. **Outdoor Adventure:** catering to the growing outdoor adventure travel base through investment in creating signature parks, trails and events with visitor appeal.
- C. **Arts & Culture:** showcasing Clay County's past, present and future to visitors and residents via public art, event programming, attraction development, support for local arts groups and targeted marketing.
- D. **Guiding Commercial Development:** establishing priorities, principals and a guiding vision to encourage and inspire developers to invest in creating signature destinations while also protecting the unique and authentic character of Clay County.
- E. **Long-Term Visioning:** laying the foundation for an iconic Riverfront destination in the future, while also monitoring emerging trends in the visitor and events industry that could inform future development.
- F. **Tourism Promotion:** developing research-based marketing initiatives that will position Clay County and its Tourism Department for success in the near- and long-term.
- G. **Branding:** Evaluating and adjusting the branding of Clay County to best communicate its current and future core pillars as a destination.

The subsequent pages provide additional analysis and insights regarding each subject, followed by detailed recommendations for strategic product development and initiatives.

This Plan will serve as a valuable tool in helping to shape a vision for future development and identifying opportunities to distinguish and elevate Clay County within the visitor industry, as well as improve quality of life for its quickly growing population base. To best inform Clay County Tourism and the other important stakeholders who will be critical in carrying out many of the initiatives herein, each recommendation sub-section is concluded with an implementation timeline that defines key initiatives, necessary stakeholder participation, and project milestones that will define what a successfully implemented project would deliver to the community.





6A | Amateur Sports



6A. AMATEUR SPORTS: Introduction

As described by Northstar Travel Group, sporting groups help de-commoditize the travel industry, provide higher profit margins for their host market relative to other travel sectors, and display a high degree of loyalty and likelihood of becoming long-term repeat customers. Hosting sports tournaments can create lasting impressions of a destination for the families attending and young athletes participating, leading to future visitation or re-location to a host market in the future. Sports facilities can also serve as an important quality of life benefit. According to a survey by Longwoods International of more than 4,000 consumers nationally, 51 percent of American agrees that hosting youth and amateur sports events improves the quality of life in their communities.

The amateur sports industry has been the fastest growing travel segment in the country since the turn of the century. According to the Sports Events and Tourism Association, \$39.7 billion on the direct spending impact of amateur and youth sports tourism in 2021, generated a total economic impact of \$91.8 billion, which resulted in the generation of 635,000 jobs and a total tax revenue of \$12.9 billion for the local economies. In 2019, 179 million people traveled to out-of-town events. During the first COVID-19 year of 2020, travel decreased by 46 percent, but it quickly rebounded in 2021 by 53 percent to 175 million travelers.

As an event vertical with significant drive-in attendance and event facilities that can often already accommodate social distancing audiences, sports tourism has experienced a swifter post-COVID rebound relative to other sectors. A destination like Clay County, with affordable hotel inventory, central location within its region, and family-friendly outdoor experiences, is well positioned to benefit from this continued growth of national and regional sports tourism. Airstream Ventures, a Jacksonville-based sports promoter, currently serves as the third-party agency for Clay County and has been successful in attracting major outdoor sports events to the region. This section evaluates opportunities to build on this momentum and develop a 10-year plan to transform Clay County into a hub for sports tourism.

The remainder of this chapter is divided into two sections, as described below:

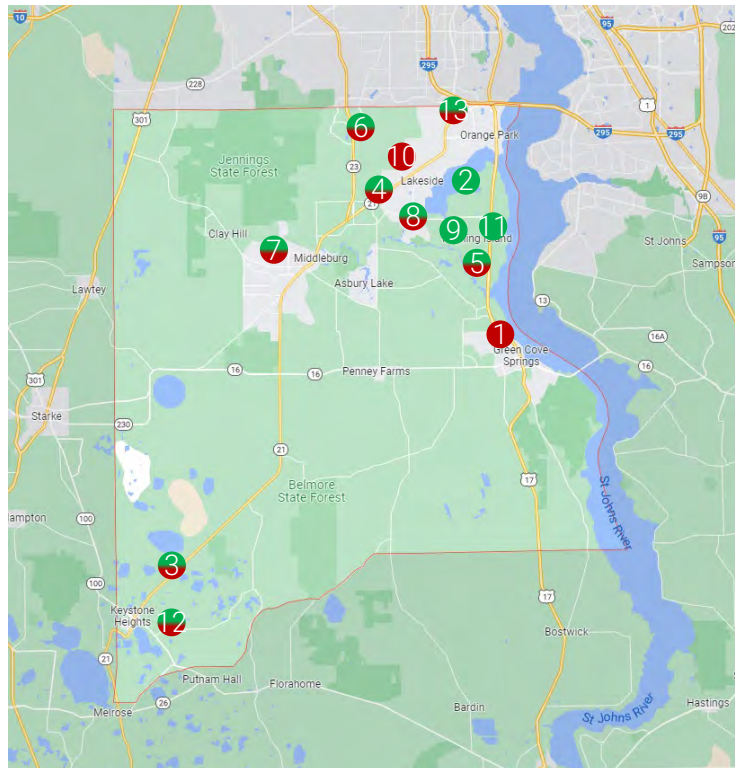
1. **Analysis** – Consists of a summary of existing amateur sports facilities in the local market, a review of competitive facility offerings within a drivable distance of Clay County, as well as a summary of findings derived from interviews with more than 15 amateur sports tournament organizers.
2. **Recommendations** – Presents a time-based list of priorities for amateur sports investment, including both the policies and programs that should be initiated and the types of product (i.e., sports facilities) that should be developed.



6A. AMATEUR SPORTS: Clay Facilities Inventory

We begin with an overview of existing sports facilities in Clay County. Key diamond field facilities include Little Rain Lake Park and Omega Community Park, which offer totals of eight and seven diamond fields, respectively. However, both fields primarily feature youth-sized fields and do not offer turf surfacing, adjustable base paths or portable fencing required by many tournament planning organizations. Eagle Harbor Soccer Complex represents the market's largest rectangle field facility, though date availability for room night-generating tournaments at this site can be difficult as Clay United requires the space for their practices and league play.

It is also important to consider the inventory of existing tournament-quality sports facilities that would likely compete with existing and potential facilities in Clay County. The following page presents a map of competitive amateur sports facilities within a drivable distance of Clay County. No tournament-quality outdoor and indoor facilities were identified within 60 miles from the middle of County, and there are generally very few indoor sports facilities in North Florida and Southern Georgia. These gaps in the sports tourism marketplace could be addressed by sports facility development in Clay County.



Source: Google, Explore Clay, 2022.

Local Diamond Field Complexes

Key	Facility Name	Baseball		Softball	Total
		Adult	Youth	All	
1	Carl Pugh Park	1	2	2	5
3	Little Rain Lake Park	2	3	3	8
4	Moody Avenue Park	0	1	0	1
5	Neptune Park	0	0	5	5
6	Oakleaf Community Park	1	2	1	4
7	Omega Community Park	1	3	3	7
8	Paul C. Armstrong	0	1	2	3
10	Tanglewood Park	0	2	3	5
12	Twin Lakes Park	1	0	0	1
13	Walter Odum	2	2	2	6
Total		8	16	21	45

Local Rectangle Field Complexes

Key	Name	Adult	Youth	Total
2	Eagle Harbor Soccer Complex	3	7	10
3	Little Rain Lake Park	2	0	2
4	Moody Avenue Park	1	1	2
5	Neptune Park	1	0	1
6	Oakleaf Community Park	1	0	1
7	Omega Community Park	1	1	2
8	Paul C. Armstrong Park	0	2	2
9	Plantation Sports Complex	2	1	3
11	Thunderbolt Park	0	3	3
12	Twin Lakes	2	3	5
13	Walter Odum Park	1	0	1
Total		14	18	32



6A. AMATEUR SPORTS: Regional Facilities Inventory



Outdoor Field Complexes

Facility Name	Market	Diamond Fields	Rectangle Fields
1 ESPN Wide World of Sports Complex	Orlando, FL	15	13
2 Boombah Sports Complex At Seminole County	Orlando, FL	15	
3 Northwest Recreation Complex	Orlando, FL	12	14
4 Oviedo Sports Complex	Orlando, FL	12	
5 Santa Rosa Sports Plex	Orange Beach, FL	12	
6 Crisp County Youth Ball Complex	Crisp County, GA	12	
7 James Messer Sports Complex	Tallahassee, FL	11	
8 Daphne Sports Complex	Mobile, AL	10	
9 Trembling Earth Sports Complex	Waycross, GA	10	
10 Ed Radice Sports Complex	Tampa, FL	10	
11 Ormond Beach Sports Complex	Ormond Beach, FL	9	10
12 Orange Beach Sportsplex	Orange Beach, AL	9	3
13 Indian Trails Sports	Painters Hill, FL	8	8
14 FishHawk Sports Complex	Tampa, FL	8	4
15 Publix Sports Park	Panama City Beach, FL	5	8
16 Tampa SportsPlex	Tampa, FL		15
17 Championship Sportsplex of Tampa Bay	Tampa, FL		15
18 Woodruff Farm Soccer Complex	Columbus, GA		11
19 Austin-Tindall Sports Complex	Kissimmee, FL		10
20 ChampionsGate Sports Complex	Orlando, FL		8
21 Jennifer Ross Soccer Complex	Savannah, GA		8
TOTALS		158	127

Source: Google, Visit Florida, 2022.



6A. RECOMMENDATIONS: Outreach Overview

To further assess potential sports facility development concepts that could enhance Clay County's standing in the regional and national sports tourism industry, in-depth telephone interviews were completed with sports league and tournament organizers for a variety of sport types. This survey process is used to assess tournament organizers' current and past usage of facilities in the Jacksonville metro area and to measure their interest in using potential new/enhanced facilities in Clay County if they were developed. Planners were asked to provide their overall impressions of the Clay County destination, the likelihood that they would rotate one or more events to Clay County sports tourism facilities, and quantities of fields/courts/etc. that need to be developed in order for the region to accommodate large events. A full listing of the groups that were contacted is presented in the adjacent exhibit.

The input collected from these organizations was used to help form the framework for a preliminary facility program and usage estimates of new/enhanced facilities in Clay County.

The following pages summarize the feedback provided by these interviewed organizations, with particular focus on the opportunity for soccer, baseball, softball, basketball, volleyball, dance and gymnastics segments. We begin with an in-depth summary of the input provided by the various outdoor sports groups, followed by indoor sports groups.

Interviewed Amateur Sports Organizations

2D Baseball	Moto Surf Games
Beaches Gymnastics	Snap Soccer
Clay County United	Southeastern Fastpitch Softball
Dynasty Hoops	Sun Country Sports
Florida Club League	Sunshine State Games
Florida Half Century Softball	Synergy Volleyball
Florida Prep Lacrosse	3R Basketball
ISSA Softball	USA Fastpitch Softball
JVC Volleyball	USSSA Fastpitch Softball



6A. RECOMMENDATIONS: Market Demand Outreach

A broad summary of interviewed organizers' impressions of the Clay County destination are summarized below, followed by input segmented by user group.



Overall View of Clay County

- **Central Location:** Tournament organizers noted that Clay County is very well located regionally to accommodate a broad drive-in audience. The incoming First Coast Expressway was noted as significantly improving accessibility for those driving in from other regional markets.
- **Facility Issues:** As previously discussed, there are a significant number of outdoor facilities (particularly soccer fields) throughout the Jacksonville metro area, but they are generally owned by private youth/amateur soccer clubs and therefore have limited or no availability for rental by outside parties. Many of these facilities are also in the mid-sized range (i.e. 4- to 6-fields) and widely dispersed throughout the market so that organizers cannot assemble the field inventory necessary to accommodate large tournaments.
- **Pent Up Demand:** In general, tournament organizers find the Clay County market especially appealing due to its central location within North Florida, proximity to northern states, overall affordability, safety and proximity to other major Florida attractions. Overall demand suggests material near-term potential to bring significant room night-generating events to the destination.



Soccer/Lacrosse

- **Significant Demand:** Interviewed soccer and lacrosse organizers, including Clay County United, Florida Club League, Snap Soccer, and Florida Prep Lacrosse, expressed significant interest in hosting events in Clay County, collectively estimating that a facility in the area could host between 25 to 35 tournaments per year. These would be primarily teams from within a five-hour drive time, though opportunity exists to host a modest number of national tournaments should the facility provide 12+ fields.
- **Facility Requirements:** Tournament organizer input suggests an ideal facility could provide between 8 to 20 fields, though many suggested that 10 to 12 fields would likely provide the best cost/benefit value for Clay County. To be a tournament-quality facility, organizers typically require at least one to two turf fields, lighting on a majority of the fields to maximize play time, and onsite structures for locker rooms and concessions.
- **Room Night Potential:** Most events represented by those interviewed range between 40- to 60-teams, or between 1,000 and 1,500 attendees, though some may attract 100 to 200 teams (approximately 2,500 to 5,000 attendees). Assuming half stay in shared hotel rooms (two to a room), this could result in up to 1,250 room nights per day for the largest events.



Baseball/Softball

- **Significant Demand:** Organizer feedback suggests potential for 20 to 30 tournaments per year in Clay County, with significant potential for repeat utilization. Interested organizations include USSSA Fast Pitch Softball, ISSA Softball, 2D Baseball, USA Fast Pitch, Southeastern Fast Pitch, and Florida Half Century Softball Association.
- **Facility Requirements:** 6 to 20 fields within one location, though 8 to 10 fields would accommodate the needs for most 100+ team tournaments.
- **Room Night Potential:** Substantial majority of respondents organized 60- to 100-team tournaments, likely representing 350 to 600 hotel room nights per day per event.



6A. RECOMMENDATIONS: Market Demand Outreach (cont'd.)



Basketball

- **Moderate to Significant Demand:** Organizer feedback from Dynasty Hoops and Under Armour 3R Basketball suggests potential for 12 to 16 tournaments per year, with potential for growth should quality facilities be built in Clay County.
- **Facility Requirements:** Organizers generally recommended the development of a fieldhouse in Clay County with space for six to eight hardwood full-sized basketball courts. This would likely entail a building with 80,000 to 100,000 square feet of indoor space. Recommended amenities include a food court, lobby/registration areas, and locker rooms.
- **Room Night Potential:** Events would likely draw 1,400 to 2,400 attendees each, with approximately 80% staying overnight typically for one night. Assuming two attendees per hotel room, this would result in approximately 560-960 room nights per event.



Volleyball

- **Moderate to Significant Demand:** Demand from Synergy Volleyball and JVC Volleyball suggests potential for 16+ events per year. This would include tournaments, showcases, and clinics.
- **Size Requirement:** Significant majority of interested tournaments would require between 16 and 24 volleyball courts, or 8 to 12 full-sized basketball courts. Recommended amenities generally aligned with those noted by basketball planners, though volleyball organizers suggested more space for hospitality (i.e., playscape and/or arcade area for younger siblings).
- **Room Night Potential:** Organizers estimated the attraction of tournaments with between 40 and 100 teams, or approximately 640 to 1,600 attendees per event. Approximately 75 percent of these attendees would stay in hotel rooms, thereby resulting in approximately 240 to 600 room nights per day per event.



Dance /
Gymnastics

- **Significant Demand:** Input provided by Beaches Gymnastics and Sun Country Sports suggests significant potential for attraction of dance and gymnastics competitions to Clay County. The previously noted lack of indoor event space in the Jacksonville metro area prevents organizers from rotating many of their events to the area, leading to pent up demand for gymnastics and dance event space in the broader destination.
- **Size Requirement:** Organizers recommended the development of an indoor space with at least 24,000 square feet of contiguous, column-less event space. Gymnastics events require an indoor space with at least 120 feet of length going one direction and a ceiling height of 25-feet or higher.
- **Room Night Potential:** Attendance estimates ranged between 1,250 and 2,800 total players and spectators, with an average of 40 percent staying overnight, with meets typically lasting two nights. These would result in between 300 to 700 room nights per event.



6A. RECOMMENDATIONS: Indoor Sports Case Studies

In speaking with sports tournament organizers and other key decision makers throughout the sports tourism industry, the facilities below exemplify “traditional” best practices for indoor sports facility design. These facilities offer between 4 and 12 basketball courts, with concession facilities, gathering areas, ample parking and other amenities. In reviewing the facilities shown below, and considering input provided by interviewed management, key takeaways that could be applicable to an indoor amateur sports facility in Clay County include:

Preferred Number of Playing Surfaces: Tournament organizers and comparable facility management recommended a critical mass of surfaces to maximize tournament attendance, suggesting the development of at eight full-sized court to be able to retain events with significant economic impact.

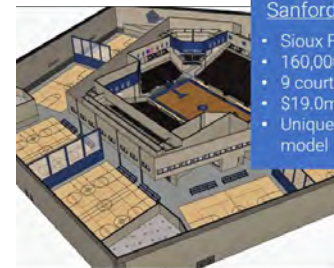





Seating: Facility management noted that seating can be an issue for some tournaments if a facility is limited on the “space between” courts. For example, Frisco Fieldhouse offers a minimum of 300 seats per court with three-tiered bleachers.

Locker/Team Rooms: Interviewees noted that some facilities with only two locker rooms struggle to accommodate the needs of ingoing and outgoing teams, recommending inclusion of four of these spaces. Many facilities have four or more smaller team rooms that can serve as coach offices or pre-/post-event gathering spaces.

Onsite Hospitality: Well-reviewed facilities often have significant spaces for attendees to rest, gather and dine. Frisco Fieldhouse offers a sporting goods store and a 5,000-square foot food court; while Rocky Top Sports World in Gatlinburg offers an indoor/outdoor cafe. The Sports Center in Myrtle Beach offers a second-story balcony for private viewings.

Storage/Back-of-House: At least 10,000 square feet is necessary for proper storage of equipment, which includes scoreboards, nets, temporary goal structures, and other such equipment. The Sports Center in Myrtle Beach struggles to accommodate its in-house equipment, so must outsource to a nearby storage building.

Financial Performance: A majority of the facilities reviewed operate at an annual financial loss ranging between approximately \$100,000 and \$500,000, though some facilities have been successful at achieving modest surpluses through aggressive programming/rentals, sponsorship sales, and efficient contracted management.

 <p>Sanford Pentagon</p> <ul style="list-style-type: none"> • Sioux Falls, SD • 160,000sf • 9 courts • \$19.0m • Unique 2-story model 	 <p>Sports Center</p> <ul style="list-style-type: none"> • Myrtle Beach, SC • 100,000sf • 8 courts • \$15.0m • Short on storage space 	 <p>Sports World</p> <ul style="list-style-type: none"> • Gatlinburg, TN • 86,000sf • 6 courts • \$20.0m • \$500k annual deficit
 <p>MidAm RecPlex</p> <ul style="list-style-type: none"> • W. Des Moines, IA • 150,000sf • 3 courts, 1 field, 2 ice sheets • 20,000-sf expo hall • Self-contained corporate model 	 <p>UW Sports Factory</p> <ul style="list-style-type: none"> • Rockford, IL • 108,000sf • 8 courts • \$24.4m • \$1.9m naming rights over 10 years 	 <p>Fieldhouse USA</p> <ul style="list-style-type: none"> • Frisco, TX • 144,600sf • 12 courts • \$17.5m • 20,000sf turf field • 10,000sf training facility

Source: Facility websites, facility management, 2022.



6A. RECOMMENDATIONS: Programs and Policies

Considering stakeholder and sports organizer feedback, opportunity exists for Clay County to significantly grow its visitor economy and support important amenities for residents through investment in sports tourism. This page and the subsequent page summarize the primary recommendations regarding amateur sports, segmented into two categories: 1) programs and policies, and 2) product development.

The adjacent graphic summarizes those programs and policies that will be instrumental in maximizing Clay County's sports tourism-related room night potential, while also enhancing some of its sports-focused parks for the benefit of the local population. These key initiatives are further detailed below:

1. Clay County has successfully attracted a number of niche outdoor events, including the Nitro Rallycross, MotoSurf World Cup, and Kayak Bass Fishing. Efforts should continue to retain these events as they bring important exposure for the region as an outdoor destination, and other events with a younger, broader participant focus, such as Spartan Races, should be pursued.
2. Visit Jacksonville expressed interest in more often working with Clay County Tourism and Airstream Ventures to assist retaining amateur sports tournaments to the area. Monthly calls could take place between these teams to coordinate tournament recruitment.
3. Little Rain Lake Park and Omega Community Park both offer significant concentrations of diamond fields and could be utilized more often for baseball and softball tournaments. Working with Parks & Recreation, efforts should be made to maintain and service these parks with staff, and Airstream Ventures should work to leverage these facilities more often for tournaments.
4. Clay County Tourism, Airstream Ventures and Clay County United should work collaboratively to identify weekends during which the United's Eagle Harbor Soccer Complex could be used for tournaments.
5. With the 5-field Regional Park coming online, which could potentially expand to 10 fields, a plan for marketing and selling the complex should begin in the near-term. During its initial 5-field phase, the facility could be packaged with Harbor Soccer Complex to host large 100+ team tournaments.
6. In the mid- to long-term, consideration should be given to launching a sports tourism office under Clay County Tourism that would focus solely on amateur sports development in the County.



1. Continue to target niche outdoors events (i.e., fishing, kayaking, tough runs)
2. Collaborate with Visit Jacksonville to target and retain youth and amateur sports groups
3. Invest in and market diamond fields to attract baseball and softball tournaments (coordinating with Parks & Recreation)
4. Work more actively with Clay United to book soccer tournaments
5. Evaluate and create an action plan for creating an in-house sports sales team
6. Begin marketing and sales of Regional Park

Tourism Impacts	<ul style="list-style-type: none"> Moderate/Significant
Resident Quality of Life Impacts	<ul style="list-style-type: none"> Moderate/Significant
Implementors	<ul style="list-style-type: none"> Clay County Tourism Clay County Parks & Rec Airstream Ventures Clay United Visit Jacksonville
Total Costs	<ul style="list-style-type: none"> Undetermined



Introduction

Existing Assets

Benchmarking

Community Survey

Non-Local Perspective

Recommendations

6A. RECOMMENDATIONS: Product Development

The recommended building programs for both indoor and outdoor sports facilities are presented in the adjacent graphics. Additional detail regarding the process of developing and operating these venues is provided below.

1. Regional Park is a suitable site for an **outdoor sports park** due to its available acreage and proximity to the First Coast Expressway. In fact, original plans included the development of ten soccer fields and six baseball/softball fields. We recommend this original plan still be pursued in the near- to mid-term to attract baseball, softball, lacrosse and soccer tournaments with high room night generating potential. It will also be important to ensure that the Park is tournament-quality, so several artificial turf fields, lighting, spectator seating, and hospitality areas will be important to include as part of these expansions.
2. Several sites throughout the County should be identified for a future **indoor tournament-quality sports facility**. This fieldhouse would ideally have a minimum of eight full-sized basketball courts, in addition to the various other amenities recommended by tournament organizers.
3. Once the full Regional Park is built out, a public authority could be established by the County to manage and book the Park to improve efficiencies and conserve County Parks & Recreation Department resources. This authority would be led by a board made up of public and private sector stakeholders, including hoteliers, business owners, government officials, etc. Alternatively, a private management firm could be secured to operate the Regional Park and/or the indoor sports facility for a management fee. We recommend evaluating the potential to work with one of these organizations through the submission of an RFI (request for information) in the next two to three years.



Recommended Outdoor Sports Facility (Regional Park) Program

- 10 to 12 full-sized soccer/multipurpose fields
 - 2 to 4 turf fields
 - 6 to 10 natural grass fields
- 8 to 10 diamond fields
 - 4 to 6 softball/multipurpose youth fields
 - 2 to 4 full-sized baseball fields
 - Adjustable mounds, fences, basepaths
- Lighting and spectator bleacher seating for 100 to 200 per field

Tourism Impacts	• Significant
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Resident Quality of Life Impacts	• Moderate to significant
----------------------------------	---------------------------

Implementors	<ul style="list-style-type: none"> • County Parks & Rec • County government • Clay United • County Tourism • Private operator
--------------	--

Total Costs	• \$15.0m to \$25.0m
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Recommended Indoor Sports Facility Program

- 100,000 to 140,000-square foot footprint
- 8 to 12 full-sized basketball courts
 - 16 to 24 volleyball courts
- 5,000 to 10,000 square feet of indoor turf space
- Additional space for lobby, food court, play areas, locker rooms, and storage

Tourism Impacts	• Significant
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Resident Quality of Life Impacts	• Significant
----------------------------------	---------------

Implementors	<ul style="list-style-type: none"> • County Parks & Rec • County government • Local school districts • County Tourism • Private operator
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Total Costs	• \$30.0m to \$45.0m
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Introduction

Existing Assets

Benchmarking

Community Survey

Non-Local Perspective

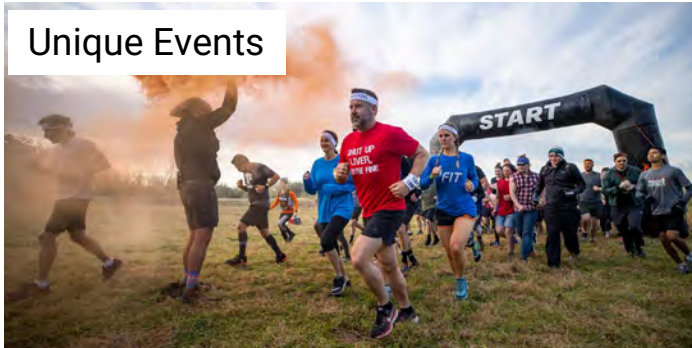
Recommendations



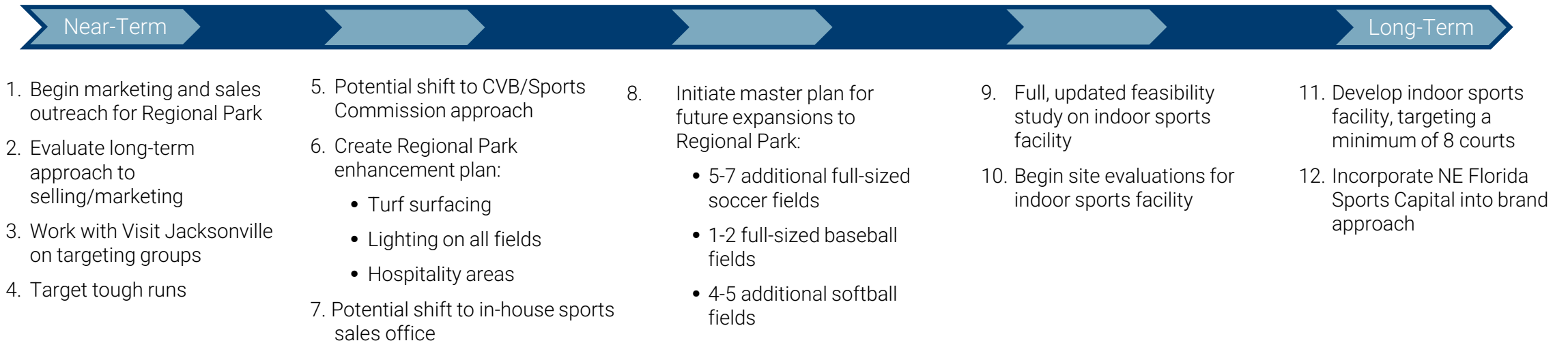
THE BIG IDEA

Within ten years, Clay County becomes one of the most popular youth sports tourism destinations in the Southeastern United States. With tournament-quality outdoor and indoor sports facilities, 40,000 or more room nights or more are generated through amateur sports tournaments, driving additional hotel supply and increases in ADR.

6A. AMATEUR SPORTS: Recommendations

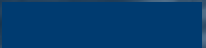


It will likely take between eight and ten years to fully implement each of the recommendations discussed above. The County, various sports clubs and potential facility management firms will have to work together in order to undertake these initiatives and product developments. We have summarized the primary initiatives and milestones for the County and local communities, placing them generally in a time sequence from near-term to long-term.





6B | Outdoor Adventure



6B. OUTDOOR ADVENTURE: Introduction

The outdoor and adventure tourism industry is growing rapidly and has had measurable effects on numerous destinations worldwide. According to Allied Market Research, the outdoor adventure tourism market was valued at \$586.3 billion in 2018, and is projected to reach \$1,626.7 billion by 2026, reflecting an annual growth rate of 13.3 percent from 2022 to 2026. It is expected that couples and families will account for much of this growth, with travel party leaders generally between 30 and 41 years of age. “Soft” adventure tourism (casual outdoor excursions such as leisure bike rides and camping), is also expected to grow significantly during this time period.

Outdoor adventure travel is ideally positioned to respond to post-pandemic conditions quickly due to its core elements – distance from crowded areas; natural settings; hiking, biking, climbing and rafting in small private parties. Research from Destination Analysts suggests pent up demand for outdoor activities, as surveyed travelers indicated canoeing, kayaking or rafting as their most anticipated travel passion once conditions for travel are safe again. Hiking finished third, camping fourth, and fishing fifth out of a list of 40+ selectable activities.

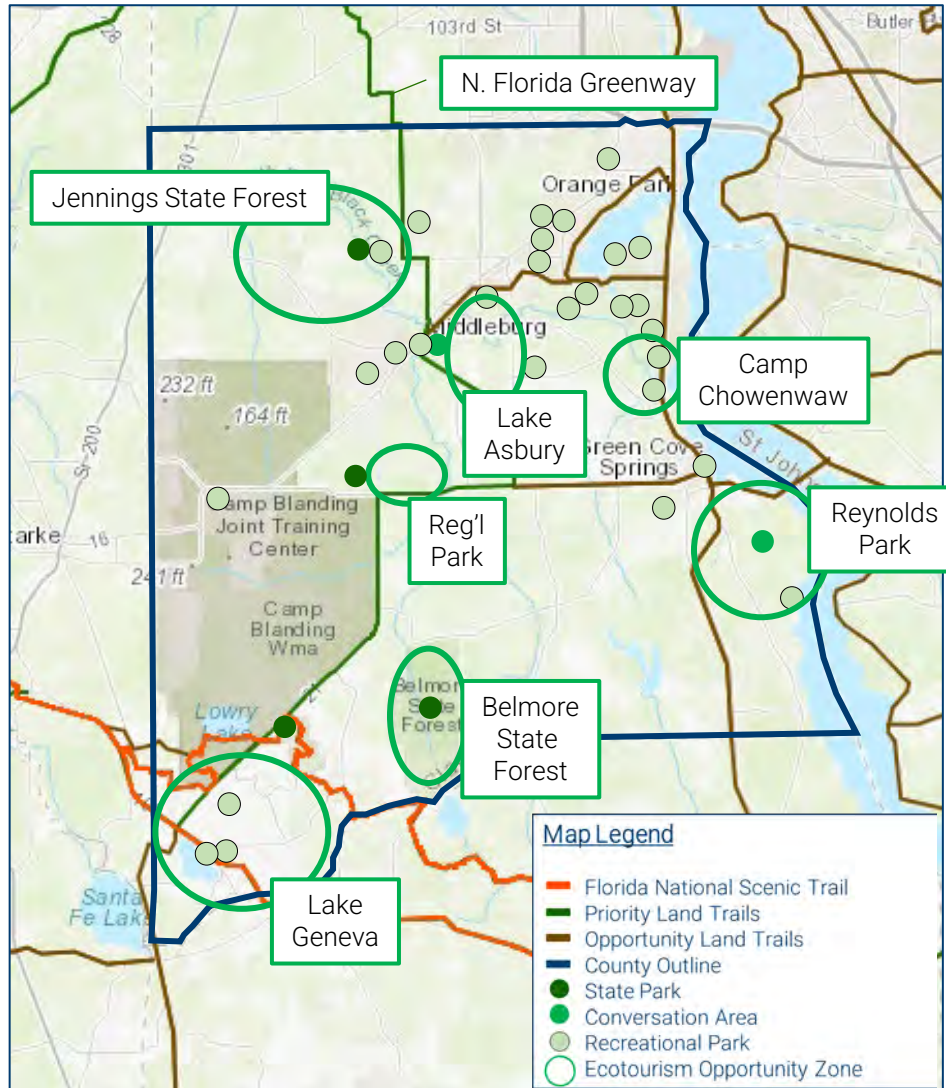
At the same time, local demand for investment in outdoor assets is significant. When asked to provide their open-ended opinions regarding how Clay could improve as a place to live, work and visit, nearly 25 percent of residents suggested the addition or improvement of outdoor activities, the most frequently mentioned theme. Further, 17.5 percent suggested creating greater water access, while 13.9 percent would like to see improvements to existing parks.

The Tourism Strategic Plan includes a focus on Outdoor and Eco Tourism due to four important factors – 1) the outdoor and adventure tourism segment is rapidly growing worldwide across all age groups; 2) outdoor travel trips are well positioned for a strong rebound following the pandemic, relative to other types of travel; 3) outdoor destination development would provide multiple important quality of life benefits for the local community; and, 4) outdoor experiences are typically a primary feature of popular mid-sized leisure markets that have experienced significant visitor base growth over the last decade, such as Bend, Chattanooga, Greenville, Asheville, and Lexington.

Analysis of existing parks, trails and water access are provided on the following pages, followed by an evaluation of opportunities to 1) enhance existing and potential future parks and campgrounds, 2) further develop existing and potential future trails, and 3) conduct other initiatives to further elevate Clay County’s outdoor adventure and eco tourism sector for the benefit of both visitors and residents. An actionable implementation timeline is presented at the end of this Chapter.



6B. OUTDOOR ADVENTURE: Clay Trails and Parks



Source: FDEP, Explore Clay, Google Maps, 2022.

The adjacent map illustrates the location of parks, conservation areas, and existing and planned bike and hike trails throughout Clay County. As shown, the northern half of the County features most of the recreational parks in the area, while the Lake Geneva area represents the primary park destination in the south. It is also important to note the construction of the Clay County Gun Range, a 30-station outdoor shooting range that will be open to the public during evenings and weekends.

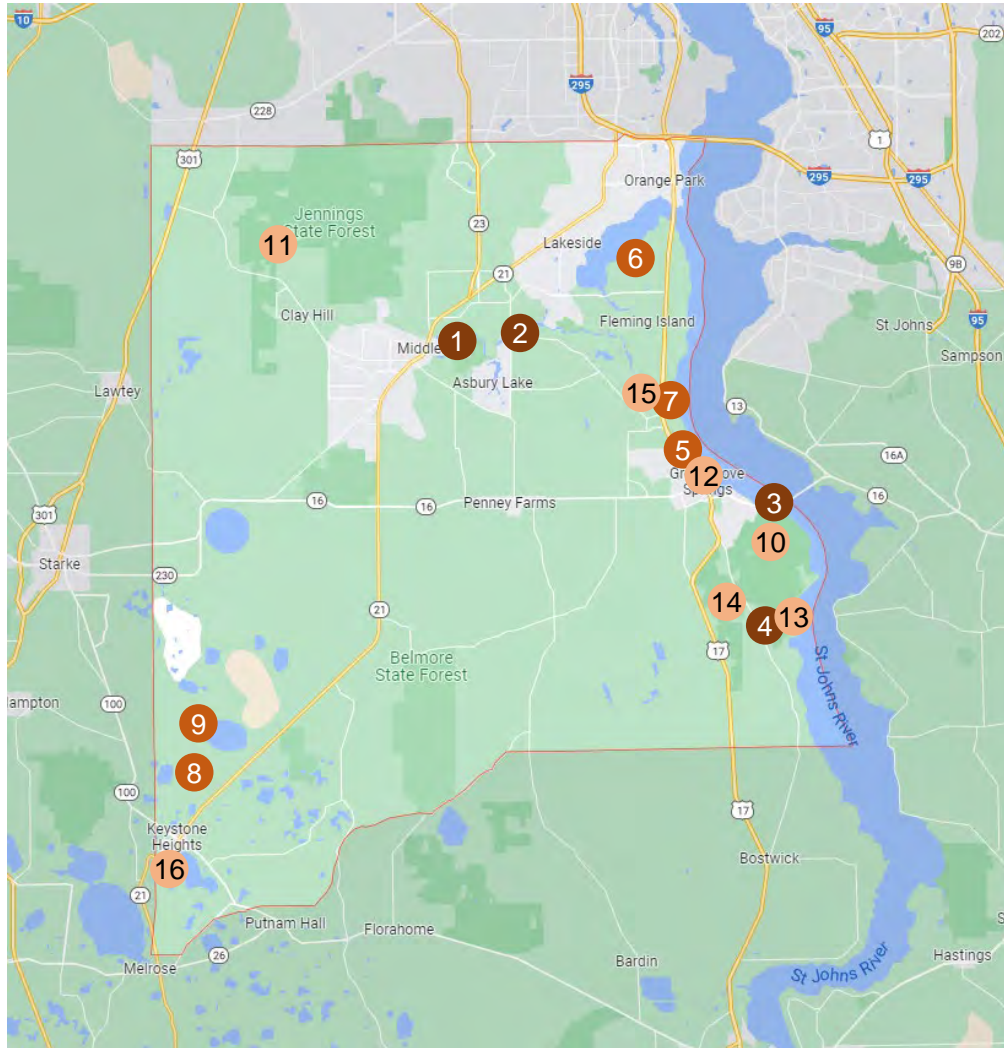
Based on feedback provided by local and non-local visitor industry stakeholders, combined with industry experience, we have identified seven areas throughout the County with tourism-related potential pending various investments. These opportunities are briefly summarized below:

- **Jennings State Forest:** state-owned park with plans for mountain bike course and other trail investments.
- **Lake Asbury/Lake Lark:** privately held lake area with potential to be purchased by the County; significant land with ecotourism potential.
- **Camp Chowenwaw:** County's current Park with highest visitor appeal, which could be further enhanced with capital investments.
- **Reynolds Park:** riverfront property currently owned by Port; could be redeveloped long-term into a waterfront destination.
- **Regional Park:** previously discussed planned sports park with walking trails and connectivity to bike trail networks.
- **Belmore State Forest:** state forest with potential for additional trail development.
- **Lake Geneva:** appeal of Lake will be enhanced significantly upon increase of its water levels via the pipeline from Black Creek; County-owned land near Lake could be developed into an ecotourism destination.

Trails outlined in this map largely represent planned trail developments, with the existing Florida National Scenic Trail crossing through the southern portion of the County. The planned North Florida Greenway will also intersect with the Scenic Trail while traversing the central portion of the County. Many of the trail-related initiatives discussed on the following pages involve the North Florida Greenway, in addition to connecting other trails with more regional, inter-County trail networks.



6B. OUTDOOR ADVENTURE: Clay Kayak/Boat Put-Ins



Source: Google, Explore Clay, 2022.

In addition to parks and trails, this Chapter also presents opportunities to create greater visitor engagement with the lakes and rivers throughout Clay County. The adjacent map highlights the locations of boat ramps and kayak launches throughout the destination. As shown, there are 11 locations with kayak access and 9 with boat ramps in the County. For a 600+ square mile County, local and regional stakeholder input suggests that it is critical to create more water engagement points for the visitor. Importantly, the County Parks & Rec Department is currently commissioning a study focused on opportunities to purchase land along Black Creek and other bodies of water and convert them into conservation areas and kayak stations. It will be beneficial for Clay County Tourism and other stakeholders to provide input on which locations could be most visible/accessible for the visitor.

Many of the recommendations within this Chapter identify opportunities to create greater access to the water using the “opportunity zones” on the previous page to do so.

Key Location	Kayak Launch	Boat Ramp
1 Sqt. Hayes Memorial Park & Main Street Boat Ramp	X	X
2 Old Ferry Boat Ramp	X	X
3 Shands Fishing Pier & Boat Ramp	X	X
4 Williams Park Boat Ramp	X	X
5 Governors Creek Boat Ramp		X
6 Lakeshore Boat Ramp		X
7 Knight's Boat Ramp & Marina		X
8 Magnolia Lake Boat Ramp		X
9 Lowry Lake Boat Ramp		X
10 Bayard Conservation Area (North)	X	
11 Jennings State Forest (West)	X	
12 Spring Park	X	
13 Williams Park	X	
14 Vera Francis Hall Park	X	
15 Camp Chowenwaw Park	X	
16 Lake Geneva Park	X	

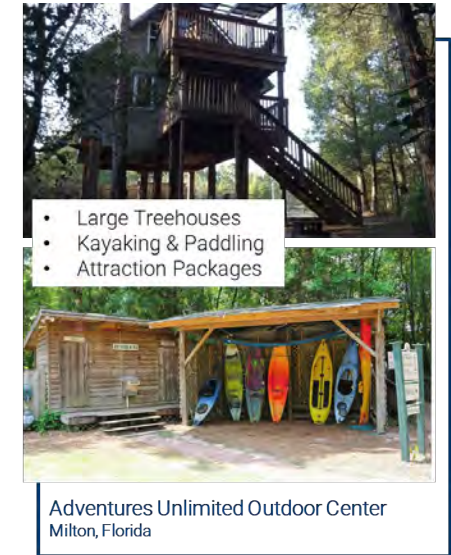
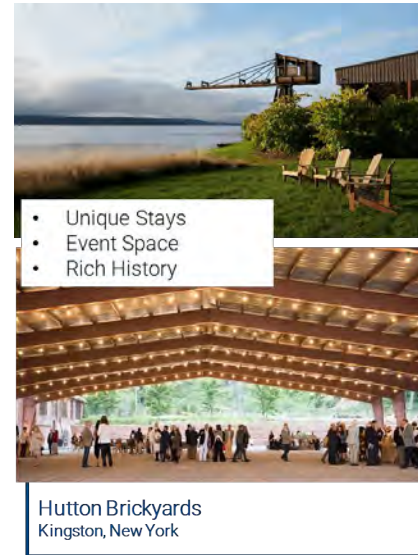


6B. OUTDOOR ADVENTURE: An Iconic Campground

A) Campground and Outdoor Adventure Destination Opportunities

To create a true visitor industry draw, and establish an iconic outdoor destination that can be enjoyed by Clay County's growing resident base, the County and other stakeholders will have to designate one to two areas as priority investment zones for outdoor adventure and eco tourism. In this way, an identified area such as Lake Asbury/Lake Lark or Lake Geneva could be enhanced with destination developments such as glamping lodging, four wheel racing, mountain biking, unique event spaces, and kayak rental stations. Restaurant and other hospitality assets could also be developed, particularly as part of waterfront locations.

Creating a signature outdoor destination with lodging will be imperative to establishing Clay County as multi-day outdoor adventure experience. As shown to the right, several notable campgrounds have been identified that offer multiple days of experiences, which can help inspire future planning regarding a signature outdoor adventure campground in Clay County. High-level summaries of each campground are provided below.



Hutton Brickyards (Kingston, NY) – Located along the Hudson River, these grounds offer unique cabin, mansion, and cottage stays surrounded by abandoned and refurbished industrial equipment and structures. The venue includes space to accommodate weddings and other events including small concerts, festivals, corporate retreats, and more.

Historic Banning Mills (Whitesburg, GA) – An adventure resort located on historic industrial mill land that has been repurposed to offer lodging in an historic hotel and high-end treehouse. Free amenities onsite include mini golf, nature trails, volleyball, tennis, paddle boats, basketball, a pool and more. Paid adventures on the property include ziplines, tree canopy, ATV courses, ropes courses, rock climbing, summer camps, horseback riding and kayaking for a range of prices and packages.

Adventures Unlimited Outdoor Center (Milton, FL) – A widespread campground with stays in unique cabins, treehouses, a hotel, and repurposed train cars. The grounds also offer outdoor activities including canoeing, kayaking, tubing, paddle boarding and ziplining.

Today, Camp Chowenwaw limited lodging inventory is often fully booked and there is limited real estate to accommodate any substantial expansion of the property. Considering this, County leadership will need to identify an alternative park in the area to host some of the product development exemplified above. However, Parks & Rec input suggests that Chowenwaw could still be enhanced as a destination through investment in more high-end treehouse properties that are climate controlled and connected to a zipline park.



6B. OUTDOOR ADVENTURE: Adventure Product at The Parks

In addition to the campground examples shown on the previous page, opportunity also exists to add other visitor-related product at both the prioritized campground destination and other smaller parks throughout the County. The case studies below summarize notable adventure-related attractions at parks throughout the country, while the following page provides examples of more cultural and educational developments.



Synthetic Slopes – Burnsville, MN

Opened in 2016, the synthetic slopes at Buck Hill features frictionless bristles manufactured by Neveplast in Italy. It is estimated that the surfacing costs approximately \$10 per square foot to purchase and install. In total, management estimates the project cost just over \$1.0 million. Admission costs \$14 for weekdays and \$22 for weekends, and a majority of attendance consists of groups and classes. At peak times, the hill hosts around 100 concurrent skiers and snowboarders on weekends, and many of these are travelers visiting Minnesota.



Boone Creek Outdoor – Lexington, KY

Championed as the first eco tourism destination in Fayette County, KY, Boone Creek is an outdoor adventure destination featuring ziplines, a canopy tour, and paddle board tours. Attraction management estimates that 80 percent of its visitors are from out of town. Boone Creek has recently partnered with area vineyards as part of “Sip and Zip” packages. The Park is considering the addition of a trail for electric bike tours, as well a treehouse overnight accommodation.



Earthjoy Treehouse – Brooksville, KY

Opened in 2007, Earthjoy Treehouse has received national press regarding its three uniquely themed treehouses that can be used for glamping, group events, and weddings. Each property is outfitted with hammocks, countertops, cooking stoves, and multiple bedrooms. The structures were designed by Pete Nelson, an internationally-known treehouse builder. Overnight rates at these properties range between \$200 and \$300 per night, and accommodations can be booked online. Earthjoy also features 200 acres for hiking, as well as tree climbing lessons.



Navitat – Knoxville, TN and Asheville, NC

Opened in 2010, Navitat is a premier tree-based zipline experience in Asheville, North Carolina. There are two zipline tours available; the Treetop Tour, which has six ziplines, two bridges, a rappel, and a spiral staircase, and the Mountaintop Tour, which features a massive high flying zipline tour with three side-by-side “racing style” ziplines, the longest of which stretches more than 3,600-feet and is 350-feet above the forest floor. Navitat was able to expand its operations due to a \$500,000 grant from the Asheville CVB. Management recommended creating an all-in-one destination that offers other experiences such as ATV rides, mountain biking, or water-based leisure to incentivize repeat visitation.



6B. OUTDOOR ADVENTURE: Park/Campground Recommendations

As presented, a variety of exciting opportunities exist to invest in Clay County’s existing and potential future parks as visitor destinations. More specific tactics that will need to be undertaken for the creation of one to two signature outdoor adventure destinations in Clay County are summarized below.

1. Costs associated with many of these initiatives prohibit a County-wide implementation throughout all parks, so it will be important to prioritize one or two parks to undergo some of these developments. Lake Asbury/Lake Lark (if purchased by County) and Lake Geneva could undergo significant development. Lake Asbury/Lake Lark would be the preferred site due to its closer proximity to the more populous part of the County and Jacksonville.
2. With an existing base of cabins, water access and event space, Camp Chowenwaw should be further invested in as an outdoor lodging center. We recommend the development of new climate-controlled treehouse properties on-site which could be marketed to out-of-County visitors and group stays. Moderate acreage may also exist to accommodate a new outdoor adventure attraction such as a zipline.
3. Between the to-be-identified outdoor destination park and Camp Chowenwaw, we recommend the following elements be included as part of outdoor attraction building.
 1. **Zipline** – a zipline tour that spans the entirety of the 200-acre park with four station “drops” along the line;
 2. **Obstacle Course** – a canopy-based course that would feature tight ropes, rope bridges, mini ziplines and other elements.
 3. **Glamping/Lodging** – unique spaces for overnight stays (akin to Camp Chowenwaw’s treehouses)
 4. **Other Family Attractions** – go-kart racing, mini-golf course, disc golf, etc.
 5. **Outdoor Exhibit Tour** – a guided tour of interactive art installations.
 6. **Edible Forest** – a walkthrough garden with vegetables, fruits, and herbs.
 7. **Event Spaces** – temporary structures such as shipping containers used as education and event spaces.
 8. **Signature Playscape** – a large, iconic playground that will serve as a base for young children.
4. Clay County Tourism and Clay County Parks & Rec will need to work extensively together in planning for these types of projects. Using this Plan as a guiding tool, the two entities will need to identify which park will ultimately be developed and to evaluate the staffing, maintenance and capital investment that will be necessary to ultimately implement these projects. Multiple outdoor outfitters will likely be needed to run many of the businesses discussed, and a private company could also be retained to manage the destination park as a standalone attraction and lodging center. This is a long-term planning effort, so it is likely that the full implementation of these projects will be phased.



1. Identify one to two parks for product development.
2. Evaluate opportunities to enhance Camp Chowenwaw.
3. Create phased plan for variety of outdoor adventure/attraction development.
4. Coordinate efforts between County Parks & Rec, County Tourism, outdoor outfitters and other potential private partners for project implementations.

Tourism Impacts	<ul style="list-style-type: none"> • Significant
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Resident Quality of Life Impacts	<ul style="list-style-type: none"> • Significant
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Implementors	<ul style="list-style-type: none"> • Clay County Tourism • Clay County Parks & Rec • Outdoor Outfitters • Other Private Partners
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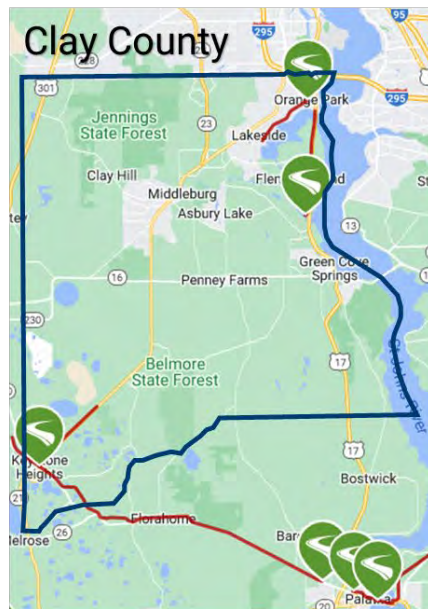
Total Costs	<ul style="list-style-type: none"> • Undetermined, likely to be shared between public and private sector
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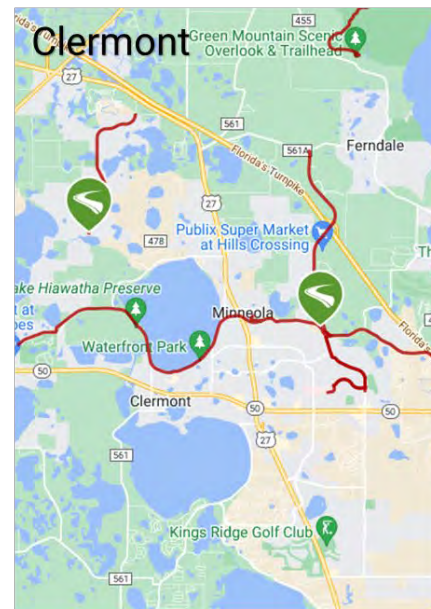
6B. OUTDOOR ADVENTURE: Clay and Trail Towns

B) Trail Opportunities

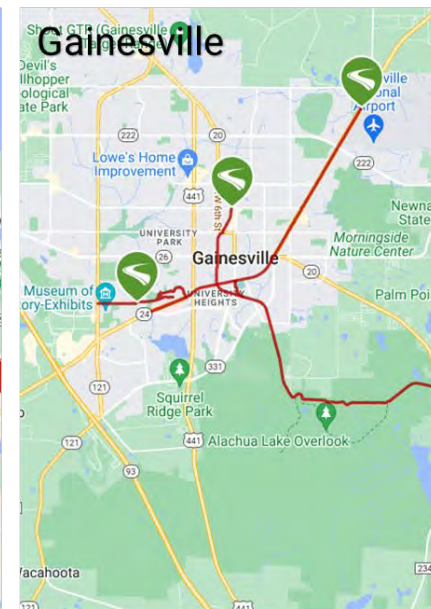
Long-range trails and trail connectivity have been key to the success of many outdoor adventure destinations throughout the country. The graphic below compares the trail inventory in/around Clay County with those of other popular trail destinations throughout Florida, including Clermont, Gainesville and Dunedin. As shown, Clay offers four separate, short-length trails. The other destinations offer greenway trails that run the entirety of their destinations, and oftentimes intersect with their downtown/urban areas. To develop a trail experience with visitor appeal, and to drive users of trails to points of transaction such as Green Cove Springs, Orange Park or other mixed-use areas, it will be important to invest in trails and trailheads that branch off from central spine trails, such as the planned North Florida Greenway. For example, Black Creek Trail could be extended to connect with North Florida Greenway, which then leads to the Florida Scenic Trail to the south and the Jacksonville-Baldwin Rail Trail which leads to Jacksonville to the east. Trail connectivity to/from Green Cove Springs will also be needed. Attaining a “trail town” designation from the state of Florida could likely assist in further developing the trails and provide beneficial visibility for future trail networks in Clay. More detail regarding the program is provided on the following page.



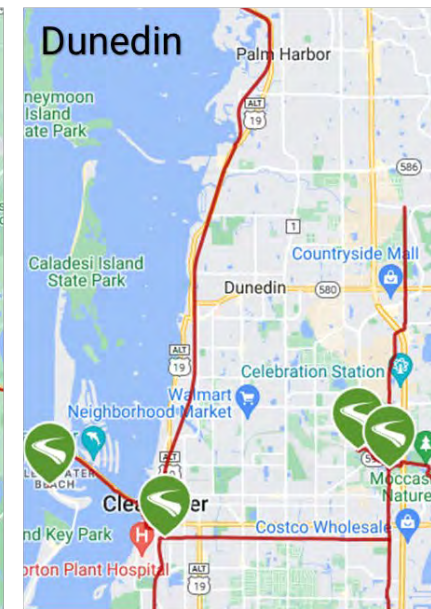
- 4 trails on Trail Link
- No long distance trails



- 1 main trail with central hub
- Long distance and connected to other trails



- 3 trails on Trail Link
- One trail follows circumference of downtown



- 1 main trail through downtown
- Connected to other trails

Source: Trail Link, 2022.



6B. OUTDOOR ADVENTURE: Trail Town Program

Each of the peer markets shown on the previous page are official “Trail Towns” in Florida. Recognized towns receive marketing exposure at the statewide level, as well as marketing materials such as signs, stickers and modest funding assistance with funding and marketing.

To apply for the program, communities must complete a self-assessment and show that they offer the following elements along their trails:

- Incentives to get trail users off the trail to explore the town.
- Clear and safe connections between the town and trail.
- Readily available information about the town.
- Businesses that offer goods and services to meet the needs of trail users.
- Festivals and events are held that draw people to the trail who may not normally be trail users.
- Safe connections to work, schools, parks and shopping for residents.
- Successful relationships with neighboring communities that promote the entire long-distance trail as a tourist destination.



“A Trail Town is a vibrant destination where people come together. It is a place where trail users can venture off a hiking, biking, equestrian or paddling trail to enjoy the amenities and unique heritage of the community, benefiting the town economically and socially.”

- Incentivizes riders to the towns’ center
- Clear, safe connections between town and trail
- Festivals on/near the trail
- Businesses and accessible amenities for riders
- Relationships and connections to neighboring communities
- Criteria:
 - Trail Quality
 - Accessibility
 - Town Participation
 - Businesses
 - Amenities
 - Safety
 - Information

Source: Florida Department of Environmental Protection, 2022.



6B. OUTDOOR ADVENTURE: Destination Trail Case Study

The Greenville Health System Swamp Rabbit Bike Trail that leads from the Reedy River has also been highly impactful and has spurred development congruent with many recent trends in the visitor industry, such as organic cafes, breweries, and Hampton Station (a craft brew and artisan campus). In fact, due to the Trail's growing popularity and promotion of health and fitness, the Greenville Health System acquired naming rights for the Trail for \$100,000 per year. In total, nearly \$2.8 million has been invested in the Trail's development since 2009, which includes a significant \$1.0 million in marketing expenditures.

The Trail is managed by Greenville Greenways, which also publishes "The Carrot" (pictured right) a quarterly publication promoting the businesses and events along the Trail. Future plans for the Trail include an expansion to surrounding counties, an overhead zip line attraction, and music festivals running the length of the Trail.

Greenville Greenways attributes the success of the trail to effective collaboration with the zoning and land use personnel at the City, and recommends other communities establish a "quarterback" committee or organization to formally guide trail network developments and their connection to existing and future commercial areas.

Prisma Health Swamp Rabbit Trail (Greenville, SC)



6B. OUTDOOR ADVENTURE: Trail Recommendations

Specific initiatives that should be undertaken as part of trail development in Clay County are further detailed below.

1. Clay County's trail system has the potential to be greatly expanded upon the completion of the North Florida Greenway. Plans also exist to add biking and hiking trails to the Jennings and Belmore State Forests, as well as the County's Regional Park and other County Parks. With these many individual projects, it will be critical to ensure that these future trail developments are designed with a collaborative vision to maximize visitor and resident usability and overall experience, and that they are prioritized to be completed in the near- to mid-term (i.e. the next four to six years). As such, it will be important to assemble stakeholders that can take action to implement projects, promote their benefit to the public, fundraise, and work with higher levels of government (i.e., state and federal level) to expediate their completion. We recommend the development of a trail/greenway board committee within the County government that can manage these projects, and potentially, the development of a formal department in the mid- to long-term (similar to Greenville, SC). Further, consideration should be given by the Clay County Bike, Blueways and Trails Committee to become a 501(c)3 that acts as a steward of future trail development, promotion and event planning. This entity, and/or the new County entities, would spearhead the efforts to attain Florida Trail Town distinction for Clay County.
2. A master plan that provides a framework for North Florida Greenway's interaction with Clay County should be initiated. The Trail will pass various points of interest noted throughout this Chapter, including Jennings State Forest, Lake Asbury/Lake Lark, and Regional Park. At each of these locations, a mix of amenities should be installed including trail heads, bike rental stores or stations, information/resources, resting areas, public restrooms and previously described park developments (i.e., sculpture trail, playground, etc.). The entities described above will be critical for working with the different decisionmakers such as Florida Forest Service and Clay County Parks & Rec.
3. In addition to maximizing benefit of North Florida Greenway, it will be equally important to plan for urban trail extensions and developments in established urban areas such as Orange Park and Green Cove Springs. This type of development will likely take more than five years to complete, so we recommend beginning planning for an extension of the Black Creek Trail southward to Green Cove Springs and westward toward Lake Asbury/Lake Lark. This would create a "short trip" circuit between Orange Park, Fleming Island, Green Cove Springs and Middleburg that would also have connectivity with the more extensive North Florida Greenway and Jacksonville-Baldwin Rail Trail.
4. The development of outdoor adventure product, such as the proposed mountain bike trail at Jennings State Forest, should be highly supported by County Tourism and other key stakeholders.



1. Create trail "quarterback" role within County government and via possible conversion of Bike, Blueways and Trails Committee into 501(c)3.
2. Develop coordinated master plan for North Florida Greenway's interaction with Clay County.
3. Develop County-wide urban trail plan.
4. Support mountain bike trail development at Jennings State Forest and other potential areas.

Tourism Impacts	<ul style="list-style-type: none"> • Moderate/significant
Resident Quality of Life Impacts	<ul style="list-style-type: none"> • Significant
Implementors	<ul style="list-style-type: none"> • Clay County Tourism • Clay County Parks & Rec • Clay's municipalities • State of Florida • BB&T Committee
Total Costs	<ul style="list-style-type: none"> • Undetermined



6B. OUTDOOR ADVENTURE: Other Recommendations

In addition to park, campground and trail-related recommendations, we have also prepared a list of other, more near-term initiatives that should take place in order to begin the positioning Clay County as a future outdoor adventure destination. Many of these could be undertaken today, though some may be best implemented in conjunction with or after the addition of the major developments described previously.

1. Clay County Tourism has succeeded at working with AirBnB and other vacation rental property owners to establish the collection of hotel tax from local rental properties, many of which are located close to the outdoor destinations discussed throughout this Chapter. To maximize the attraction of potential outdoor adventurers, cyclists, mountain bikers and other more casual outdoor enthusiasts going forward, we recommend sharing this Plan and forthcoming goals and objectives with local vacation rental property owners to educate them as to the future Clay vision for outdoor amenity development. Many communities throughout the country host workshops and seminars with their local property owners to teach them best practices and to lead a coordinated effort to show vacation rental guests “the best” their destinations have to offer. In this way, Clay County Tourism can encourage property owners to promote lakes, parks, trails and other amenities to guests.
2. As previously discussed, the Parks & Rec Department is currently creating a Masterplan that will guide future acquisitions of waterfront properties. This will enable the County to add boat ramps and kayak put-ins at new areas throughout the destination. County Tourism should be closely involved with this process and should work with Parks & Rec to prioritize the development of these types of amenities at locations that are near population centers and highly visited areas, and should prioritize the possible inclusion of outdoor outfitters, rental stores and potentially restaurants and other hospitality amenities at these locations.
3. Existing opportunities for glamping should be highly promoted and tied in with outdoor experience packages throughout Clay County. The recently opened Keystone Heights RV Resort and various vacation rental properties throughout the County should be marketed to outdoor leisure travelers as glamping stations that support outdoor exploration, and campground rental stays should be included with hotel room nights as part of a more holistic performance dashboard for Clay County Tourism.
4. Opportunities should be evaluated to more frequently activate Clay’s parks for the residents. Barbecues, local concerts, cornhole tournaments, food contests, and outdoor painting classes are all potential concepts mentioned by stakeholders.
5. Clay County Tourism and other stakeholders should identify local “champions” in the bike, hike, kayak, canoe and paddleboard communities and work with them to start active online hubs. Facebook, Instagram, Tik Tok and other online resources could be created by all of these groups to organize event and share information/resources regarding trails and parks. This would organically grow content and resources to be viewed and used by residents and visitors, as well as help create a stronger buzz for Clay County’s natural assets.
6. Once many of the previously discussed developments are added to Clay County, Clay County Tourism will have significant opportunity to market multi-day itineraries centered around the outdoor adventure opportunities in the destination. Tying trail or park experiences with dinner during Food Truck Friday at Spring Park, a day at the future Clay County Gun Range, a round of golf at Fleming Island Golf Club, and a one-day trip to Orlando while staying at an affordable Clay County hotel could have significant appeal to a variety of travelers.

1. Work with vacation rental property owners inspire visitors’ perceptions of outdoor adventure in Clay County; add vacation rental stays to hotel stays as part of tourism dashboard.
2. Provide tourism lens to County Parks & Rec Master Plan.
3. Market existing glamping opportunities at Keystone Heights RV Resort and various vacation rentals.
4. Evaluate opportunities to more frequently activate parks with programming.
5. Foster growth of outdoor adventure communities.
6. Market multi-day itineraries centered around outdoor adventure.

Tourism Impacts	<ul style="list-style-type: none"> • Moderate
Resident Quality of Life Impacts	<ul style="list-style-type: none"> • Moderate/Significant
Implementors	<ul style="list-style-type: none"> • Clay County Tourism • Clay County Parks & Rec • Rental property owners • Local outdoor champions
Total Costs	<ul style="list-style-type: none"> • Undetermined



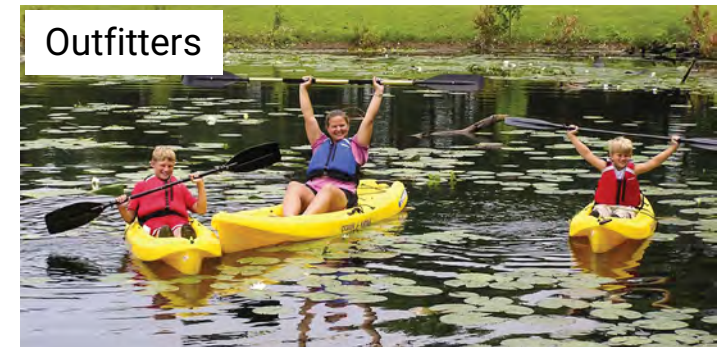
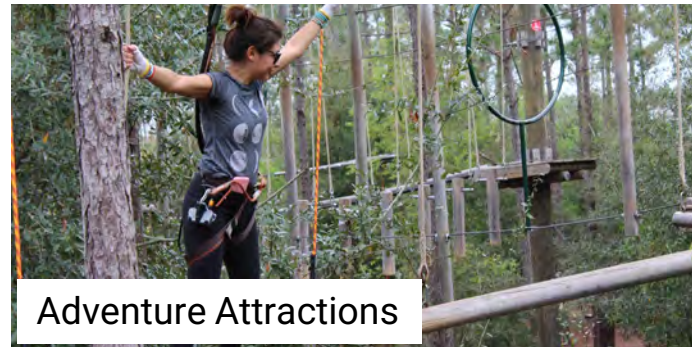
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THE BIG IDEA

Within ten years, Clay County becomes one of Florida's most popular outdoor adventure destinations. Multi-day trail experiences, a signature outdoor adventure park, and glamping overnight stays generate significant social media buzz, leading to organic growth of events and leisure visitation and ADR in the area.

6B. OUTDOOR ADVENTURE: Recommendations



- | | | | | |
|--|---|--|--|---|
| <ol style="list-style-type: none"> 1. Establish tourism committee voice in review of Parks Master Plan <ul style="list-style-type: none"> • Encourage enhancement of staff and visitor resources • Prioritize County purchases for conservation lands 2. Prioritize glamp and adventure improvements at Camp Chowenwaw 3. Promote RV Resort and various vacation rentals as glamping options for outdoor experiences 4. Fortify Bike, Blueways and Trails Committee (create a 501c3?) 5. Advocate for trail development and events at state parks 6. Foster paddleboard and kayak community growth 7. Establish hotel/vacation rental/campground dashboard | <ol style="list-style-type: none"> 6. Identify future family adventure destination park <ul style="list-style-type: none"> • Ziplines • Ropes course • Rock climbing • Lazy river • Water trampolines 7. County/state and community approach to developing North Florida Greenway 8. Create cross-promotion itineraries – events, experiences + unique lodging | <ol style="list-style-type: none"> 9. Prioritize tourism investments along trail developments <ul style="list-style-type: none"> • Outfitters/rentals • Bike/scooter share • Public art • Authentic commercial areas • Events/programming 10. Select park (Lake Asbury or Lake Geneva) for family destination park | <ol style="list-style-type: none"> 11. Distribute RFP for private operations of adventure park 12. New trails fully developed 13. Market the most extensive trail network in Florida 14. Develop family adventure destination park | <ol style="list-style-type: none"> 15. Establish and promote as a major family sports and adventure destination in North Florida |
|--|---|--|--|---|



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6C | Arts & Culture



6C. ARTS & CULTURE: Introduction

Culture, history and the arts help tell a destination's stories to visitors and residents. Programming such as arts festivals, concerts, and holiday celebrations showcase a destination's community and *present* state; attractions such as museums and historic landmarks highlight its *past*; and artistic talent and arts scene showcase its visions and hopes for the *future*.

Clay County currently offers a myriad of cultural assets including a robust inventory of events and festivals, the Thrasher-Horne Center, the Clay County Historic Triangle, and an assortment of historic museums throughout the County. During site visits and stakeholder interviews, these scattered attractions generate modest visitor traffic, but many stakeholders feel that opportunity exists to create more mainstream draws that have appeal to younger visitors.

Considering resident and stakeholder input, in addition to insights gathered from destination benchmarking research and non-local perspective interviews, we have identified four key focus areas for destination development related to arts, culture and history in Clay County. These are listed below.

1. Events and Festivals
2. Celebrating Southern Rock
3. Public Art Development
4. Historic Asset Strategies

Many of these initiatives could be spearheaded by Clay County Tourism, though other community stakeholders, such as artists and arts organizations, will be necessary in order to best implement them. The subsequent pages provide analysis and recommendations for each of these themes.

Events and Festivals



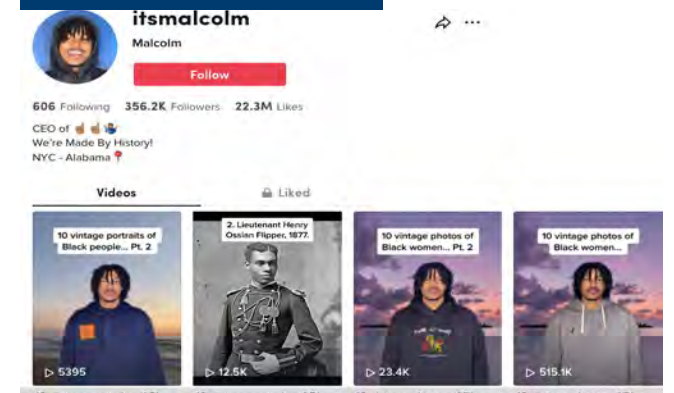
Celebrating Southern Rock



Public Art Development



Historic Asset Strategies



6C. ARTS & CULTURE: Major Existing Events

1. Events and Festivals

Events and festivals can generate significant visitation for a destination, strengthen its brand and benefit the local resident base. They also induce demand for any given area, and if developed with quality programming, can bring significant visitation to small-market and suburban destinations. Blue Ox Festival in Eau Claire, WI and Electric Forest in Rothbury, MI represent examples of small markets with destination festivals that attract tens of thousands of overnight visitors to their respective markets.

Just over 28 percent of surveyed residents scored events/festivals as a potential opportunity for tourism improvement in Clay County, making it the fifth most frequently mentioned concept. Further, many survey respondents younger than 35 showed a much higher interest in a southern rock festival relative to their older counterparts, suggesting the opportunity to draw younger visitors to Clay County through creation and/or investment in festivals.

The Clay County area hosts a number of events that draw 1,000 or more attendees throughout the year, though with a limited number drawing significant non-local attendance. A sampling of some of the area's largest festivals are shown to the right. Trends in the national event industry suggest that today's attendees are seeking authentic and immersive experiences, as well as multi-layered "destination events" that include a variety of activities and themes. Clay County currently offers a number of one- to two-day festivals, but opportunity may exist to grow one or a select number of these into longer, more multi-faceted festivals with stronger overnight visitor appeal. Alternatively, an entirely new countywide festival could be developed that celebrates themes unique and authentic to the Clay County region.

More specific direction regarding event and festival investment in Clay County is provided on the following page.

Clay County Fair
132,000 attendees



Fall Festival
45,000 attendees



Scottish Games and Festival
22,000 attendees



Other Notable Events

- CalaVida Arts Festival
- Strawberry Festival
- Fourth of July
- Memorial Day RiverFest
- Kids' Fest
- Food Truck Fridays
- Bella Notte



6C. ARTS & CULTURE: Events and Festivals Recommendations

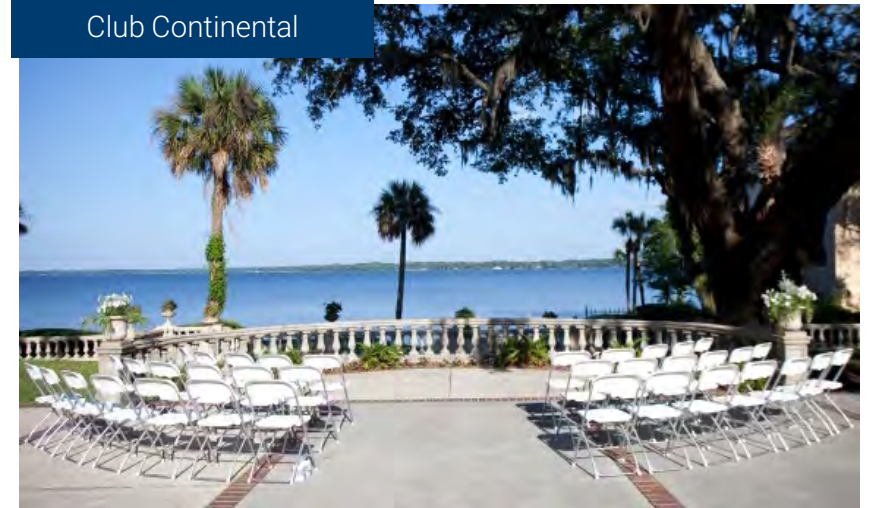
Detailed direction regarding event and festival development in Clay County over the next ten years is summarized below.

1. The County Fairgrounds is the most active event center in the destination. The facility's master plan includes a rearrangement of the campus's layout to better support livestock/ag events, as well as capital improvements to its indoor event spaces. We recommend these initiatives be prioritized for near-term completion, and that more resources and staffing be added to better market and sell these event spaces to local and non-local groups. Indoor spaces should be able to host more banquets and cultural events, while the entire complex could add one to three signature events per year such as a renaissance festival, haunted house villages, holiday light villages, music festivals and other programming.
2. Club Continental represents a "hidden gem" in the broader Jacksonville visitor economy, and a rare large-scale waterfront property open to visiting events. Clay County Tourism should continue to work with property owners to explore opportunities to increase marketing and event activity at the property.
3. Thresher-Horne Center has had recent success with hosting classic rock and emerging country acts, while also serving the community by hosting a wide array of local events. These efforts should be continued and supported by the tourism community through online promotion. Further, efforts should be made to work with St. Johns River State College to establish in-person esports events at the Center.
4. Clay County Tourism currently offers support to event planning offices within the individual municipalities such as Orange Park in the form of promotion and planning assistance. Consideration should be given to creating a full-time role within the County focused on growing events and festivals in the County. This role could potentially focus on activating the Fairgrounds while also collaborating with individual city offices to best develop their major events.
5. Stakeholder input highlighted Fall Festival, Kids Fest, Scottish Games and Festival, and Bella Notte as events with some material potential to grow long-term. An event committee and/or a new role within the County should evaluate ways to further grow these events in the future, using resident and visitor surveys to help guide programming developments.
6. Spring Park's Food Truck Friday has been a significant success in bringing visitation to Spring Park and the Walnut Street area. Efforts should be made to leverage this visitation and visibility, and periodic programming such as buskers, art pop-ups, and educational kiosks should be added to better engage visitors, boost repeat visitation and moderately enhance non-local visitation.

Clay County Fairgrounds



Club Continental



6C. ARTS & CULTURE: Events and Festivals Recommendations (cont'd.)

6. Strategic Plan research suggests opportunity for one major festival in Clay County to be developed within the next three to five years. This type of signature destination event must be able to attract a large diverse audience through a theme/concept tied to unique elements of the community, with a variety of unique and engaging components that are representative of the region and its history. This would give visitors a reason to spend multiple days engaging in programming throughout the area and would help attract a wide variety of visitors seeking different types of experiences. The planning process for such an event will require the following steps:

- a) **Forming a committee:** a “quarterbacking” organization should be developed that includes individuals from the hospitality, entertainment, government and corporate sectors that will work together to carry out planning tasks over a three- to five-year period.
- b) **Establishing a theme:** potential festival themes include southern rock, Clay’s history as a vacation destination in the late 1800’s, outdoor recreation and sports, and family fun, among others.
- c) **Programming:** the event could include large concerts, food truck and vendors zones, cooking competitions, races/obstacle courses, fireworks, and other such activity.
- d) **Locations:** potential locations could include Town Hall Park or Moosehaven in Orange Park, Spring Park/Walnut Street in Green Cove Springs, and/or Clay County Fairgrounds. As the event grows, multiple theaters of activity could be developed throughout the County.
- e) **Timing:** the event would take place over three days, and potentially grown to a two-weekend event after five to six years.
- f) **Partners:** a regional promoter such as Adams Entertainment could help secure talent to perform at such a festival, while local/regional businesses could serve as sponsors.



1. Prioritize implementation of Clay County Fairgrounds Master Plan and evaluate approach to marketing/selling building; create goals for retaining more indoor and outdoor events to campus.
2. Continue to work with ownership to market Club Continental to the group segment in North Florida.
3. Establish an event support committee or role to tighten the working relationships with municipalities.
4. Identify one or two existing festivals to further develop (Fall Festival, Scottish Games, Kids Fest or Bella Notte).
5. Further build out programming at Food Truck Friday.
6. Begin planning for one new major festival at highly visible location within County.

Tourism Impacts	<ul style="list-style-type: none"> • Significant
Resident Quality of Life Impacts	<ul style="list-style-type: none"> • Moderate to Significant
Implementors	<ul style="list-style-type: none"> • Clay County Tourism • Clay County Fairgrounds • Club Continental • Orange Park • Green Cove Springs • Entertainment Promoter • Other hospitality/business leaders
Total Costs	<ul style="list-style-type: none"> • Undetermined



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6C. ARTS & CULTURE: Community Music Investment

Several communities throughout the country define their brands and identities through the music history and heritage that took place in their communities. CSL identified three eastern US communities that focus on highlighting their past and current involvement in the music culture and history that provided, and continues to provide, meaning and pride to those communities. These three communities highlight their music culture in their tourism promotion and at public and community events with an aim towards providing notoriety to these communities and a point of pride for their residents.

Owensboro, KY



Owensboro is a small community in Kentucky that has found a level of pride and identity in its Bluegrass music history and heritage. The city is labeled the “Bluegrass Music Capital of the World.” On the city’s tourism website homepage, it highlights music with large links, photos highlighting music culture, and a list of live music events in the city. The city also hosts the Bluegrass Music Hall of Fame, a large museum focused on Bluegrass music. The community hosts several large music events and festivals surrounding Bluegrass music.

Ashland, KY



The Country Music Highway is a 150-mile scenic highway along U.S. 23 that runs through seven counties in eastern Kentucky. Its purpose is to highlight the portion of the country that has produced more million-selling singers per capita than any other region in the world. Along the highway are music themed museums, gift shops, iconic music venues, art installations, signage, storytelling, and more. One stop on the highway, Ashland, KY, has the historic Paramount Art Center, a music venue that hosts local, regional and national acts.

Bibb County, GA



Bibb County is a community in Georgia that utilizes its music culture and history to build on its broader tourism package. Throughout Macon are several ‘instagrammable’ art installations highlighting its music culture including pieces such as sculptures and murals. Macon has several music venues including historic theaters, and is currently building an outdoor amphitheater. Additionally, Grant’s Lounge in Macon is known as a home of Southern Rock music in the US. The county also has several self-guided music tours.

Source: Google, CVBs, Museum Sites, 2022.



6C. ARTS & CULTURE: Halls of Fame

A direct method of highlighting the music culture and history of a location is the development of a music 'hall of fame.' These locations can attract visitors from long distances, provide music notoriety to a location, and become a point of pride for residents. Halls of Fame are aimed at preserving historical music artifacts, protecting music history and culture, and providing immersive experiences that educate visitors as to this musical heritage. These facilities can range from large, nationally marketed attractions to small, traveling organizations solely focused on education and preservation of music history.

Owensboro, KY



Bluegrass Hall of Fame & Museum

Built in 2018, this \$15 million facility is in downtown Owensboro. The Bluegrass Music Hall of Fame is a large museum filled with interactive exhibits, posters, costumes, instruments, and other music artifacts highlighting the history of Bluegrass. The museum hosts several Bluegrass events and festivals annually, and offers educational classes to learn about and how to play the music. Additionally, the museum has a performance venue in which it hosts performances year-round.

Tuscumbia, AL



Alabama Music Hall of Fame

This hall of fame opened in 1990 in Tuscumbia, AL. Its mission is to preserve and highlight the music heritage of Alabama. It has several interactive exhibits and numerous preserved music artifacts. Outside the facility is a paved, commemorative walk of fame filled with the names of prominent Alabamian artists. The museum hosts field trips with orientations for K-6th grade and 7th-12th grade. The museum can be rented out for private events and parties, and also has a rentable recording studio for creating new music.

Galax, VA



Blue Ridge Music Center

The Blue Ridge Music Center is a music museum and outdoor amphitheater located on the border of Virginia and North Carolina. The museum is called the "Roots of American Music Exhibition" and highlights the music heritage of the surrounding region through interactive displays, history writeups, musical recordings, instruments, and other artifacts. The outdoor amphitheater is an open grass space with a permanent stage and seats approximately 2,500 people. The venue hosts free and paid concerts throughout the year.

Source: Google, CVBs, HoF Sites, 2022.

6C. ARTS & CULTURE: Southern Rock Recommendations

The following initiatives are designed to elevate Clay County's music history within the heritage and pop history travel landscapes, while also providing product that will help extend the stay of other mainstream visitors.

1. Current Lynard Skynard and southern rock landmarks and attractions within Clay County are limited, therefore a "trail" or itinerary would be difficult to establish. Instead, Clay County Tourism and other local stakeholders should prioritize the development of public art installations and a roadway dedication to southern rock history featuring historical markers along the way. A special southern rock area at the art galleries of Thresher-Horne Center could be established as part of this initiative.
2. A planning committee should be established to identify sites and program elements of a future Southern Rock Hall of Fame in Clay County. This would likely be a southern rock historical society with 501(c)3 distinction. Similar hall of fame and/or museum attractions in Owensboro, KY and the Blue Ridge Music Center in Grayson County, VA should be used as models for this type of attraction. Potential sites suggested by local stakeholders include the Regional Park, County Fairgrounds and the soon-to-be-redeveloped bestbet casino site. A national architect and planning firm should eventually be retained to assist with designing the venue.
3. In addition to the Hall of Fame, a small amphitheater or performance space should be added to support live music performances on weekends, as well as private events on other days of the week. Similar to the Blue Ridge Music Center in Grayson County, VA, this could offer a capacity of 2,000 to 3,000 spectators, and feature high-quality sound and lighting systems.
4. Use hall of fame and performance space as central theater for potential future southern rock festival (previously described as part of Events and Festivals Recommendations).



1. Identify opportunities for southern rock trail connecting various landmarks and featuring southern rock public art installation.
2. Establishing southern rock historical group with 501(c)3 distinction to being planning Southern Rock Hall of Fame attraction at highly trafficked location within the County.
3. Develop hall of fame in conjunction with modest amphitheater space to support southern rock programming.
4. Use Southern Rock Hall of Fame as base for future Southern Rock Festival.

Tourism Impacts	<ul style="list-style-type: none"> • Moderate to Significant
Resident Quality of Life Impacts	<ul style="list-style-type: none"> • Moderate to Significant
Implementors	<ul style="list-style-type: none"> • Clay County Tourism • Local musicians • Clay County Historical and Cultural Society • Future southern rock non-profit • Future arts council
Total Costs	<ul style="list-style-type: none"> • \$10.0 to \$20.0m for museum and amphitheater



6C. ARTS & CULTURE: Public Art

3. Public Art Development

With planning for a potential Clay County arts council taking place, there will be opportunities to develop connections between the arts and the visitor industry. Public art development represents an important opportunity to highlight a community's unique sense of identity and character, and continued investment in its development can help create a sense of vibrancy that is conducive to retaining and attracting residents, businesses and visitors. For Clay County, the photo opportunities, social media value, and enhanced placemaking provided by public art would advantageously position the destination within an evolving visitor industry. Examples of unique and lauded public art programs in three comparable destinations nationally are described below.



Sculpture Trails

SculptureWalk Sioux Falls, SD

The SculptureWalk is a year-round, outdoor art exhibit displayed throughout the city of Sioux Falls. The exhibit has quickly grown from 10 to nearly 70 sculptures over the last decade. All sculptures are also aggressively promoted to the public for sale. SculptureWalk receives a 25 percent commission on any sculpture sold and on any commissioned sculptures, except for the People's Choice and Best of Show sculptures. Historically, approximately 25 percent of all sculptures have been purchased.

The trail also serves as the centerpiece for Taste of Sioux Falls, the city's largest event, during which auctions are held on the trail's sculptures.



Mural Programs

NEON District Murals Norfolk, VA

To encourage more successful implementation of public art projects in NEON, Norfolk's primary arts district, the Downtown Norfolk Council has created a Public Art Program, led by the NEON District Committee. The Public Art Program is available to property owners, tenants or artists interested in undertaking professionally crafted artistic designs that enhance the street environment and bring life to the NEON District. The Public Art Program aims to reduce the material and design costs to working artists, and to provide additional and meaningful incentives to property owners and tenants. Grants of \$3,000 may be given to artists and partnering businesses based on their materials and design fees.



Interactive Installations

Curb'd Parklets Covington, KY

Renaissance Covington (the downtown development agency of Covington, Kentucky) partnered with People's Liberty (an arts-related philanthropic foundation from Cincinnati) to establish a temporary public art program that would transform several parking spaces in front of local downtown businesses into interactive art installations. Over the course of multiple months, several workshops and "meet and greets" were held to help connect local businesses interested in participating in the program with prospective artists. These pairings developed concepts ranging from a bike-powered cinema (pictured above), to 3D hopscotch, to a "make-a-wish" igloo.



6C. ARTS & CULTURE: Public Art Development Recommendations

Considering the public art programs showcased on the previous page, the following tasks have been outlined to help guide the development of a Clay County arts council and public art program.

1. Clay County Tourism should continue its involvement with leading the development of a County arts council. Developer impact fees have been proposed as the primary funding source, and various stakeholders in the arts have been closely involved with planning the structure, mission, vision and services for the group. St. Johns and Duval County arts councils can be consulted to provide helpful guidance for the group's formation.
2. Once the arts council has been established, the group should initiate a public art master plan. In addition to local artists and other arts-related stakeholders, Clay County Tourism should be a primary stakeholder in the formation of this plan to help guide public art installation and event development that aligns with the following key principles:
 - a) **Monumental:** one or several signature, multi-story installations (either sculptures or murals) that are eye-catching and highly photographable.
 - b) **Interactive and unique:** temporary or permanent installations that are kinetic or technologically enhanced and engage passersby, similar to the Curb'd Parklets program in Covington, KY.
 - c) **Highly visible:** installations should be developed within highly visited areas such as Spring Park and Walnut Street, Wells Road in Orange Park, the County Fairgrounds, Regional Park, and other areas.
 - d) **Authentic Themes:** Clay County public art installations should tie to themes that are unique and authentic to the area's heritage. Ideas cited by local and non-local stakeholders include Augusta Savage, the area's agricultural history, and southern rock.
3. In addition to the impact fees that may fund a future Clay County arts council, a one to two percent developer fund should be created to help fund the implementation of the public art master plan throughout the County, as managed by the arts council. With a variety of future development that will follow the completion of the First Coast Expressway, it is likely that this modest assessment could provide significant funding for murals, sculptures and temporary art in highly visited areas.



1. Continue with planning and formation of Clay County Arts Council, using Duval and St. Johns Counties as guiding examples.
2. Prepare public art master plan to develop a list of themes, styles, and locations for public art installations and events.
3. Evaluate potential to establish a percent for art fund to help implement public art master plan projects.

Tourism Impacts

- Moderate

Resident Quality of Life Impacts

- Moderate to Significant

Implementors

- Clay County Tourism
- Future Clay County arts council
- Local artists
- Local historians
- Developers
- Local business and property owners
- St. Johns and Duval County Arts Councils

Total Costs

- \$20,000 to \$50,000 for public art master plan
- \$10,000 to \$100,000 per year for public art installation projects



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6C. ARTS & CULTURE: History Influencers

4. Historic Asset Strategies

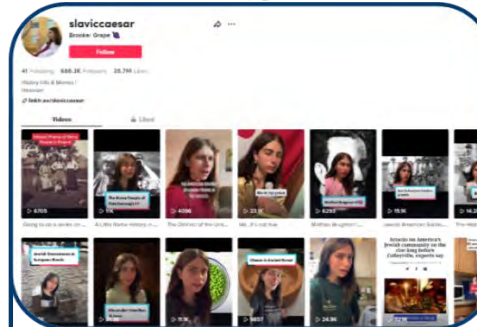
According to stakeholders and surveyed residents, Clay County's rich history as a late 19th-century vacation destination, leading dairy producer, and one of Florida's oldest municipalities is not well-known to either visitors nor the local population. Opportunity exists to better connect this rich cultural context with the visitor experience, and to instill Clay County's growing resident base with greater knowledge of and pride in the destination's heritage.

The graphics below demonstrate the "modern era" of historic tourism. Whereas destinations have traditionally relied on pamphlets, motorcoach tour buses or visitor centers to help tell their stories, influencers on platforms such as Tik Tok and Instagram have made a living by traveling and vlogging about unique, off-the-beaten path destinations with unique history and heritage. Each of the influencers summarized below could be useful partners for showcasing Clay's historic assets.

This era of digital and freelance marketing with significant reach and engagement potential will be beneficial to an emerging destination such as Clay County. Beyond investing in the improvement of various history assets, such as museums and landmarks, it will be more important to improve exposure through the use of Tik Tok, Google analytics and other tools.

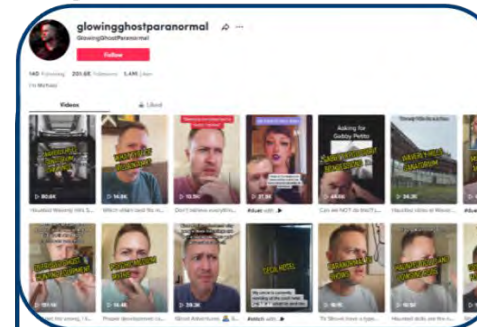
For reference, the influencers to the right generally work with DMO's for \$10 per 1,000 followers. Using these metrics, Brooke Pavek could likely work on a social media campaign with County Tourism for approximately \$7,000 per spot/content post, while Glowing Ghost Paranormal could work for closer to \$2,000 per spot/content post. Importantly, this new primary form of marketing is also more cost effective than the development of traditional marketing materials. These social media tactics and related strategies to enhance Clay County's historic assets and experiences are further detailed on the following page.

Brooke Pavek (@slaviccaesar)



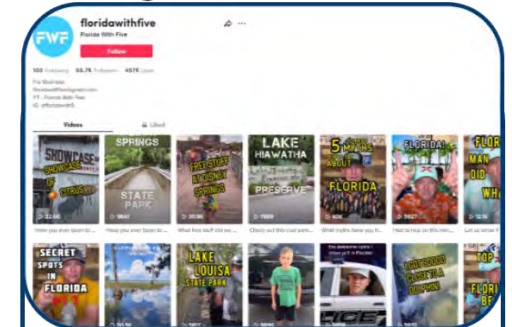
- Followers: 688.3k
- Total Likes: 35.7M
- Comedic, Theatrical History Lessons
- From Jacksonville, FL. Does not travel for videos

@GlowingGhostParanormal



- Followers: 201.6k
- Total Likes: 1.4M
- Haunted Destination Exploration
- Has traveled to Iowa, Texas, Kentucky, California, and other states

@FloridaWithFive



- Followers: 88.7k
- Total Likes: 457k
- Family with the knowledge of the "Best Things to do in Florida", "Secret Places", and day in the life attractions
- Focus primarily on Florida



6C. ARTS & CULTURE: Historic Asset Strategy Recommendations

We recommend the following initiatives for maximizing Clay County's historic assets for the visitor industry over the next ten years.

1. Tik Tok and Instagram influencers with history, paranormal and/or family themes like those presented previously should be retained to showcase some of Clay's historic assets. Potential content could focus on areas like the County Jail and the Historical Triangle, Penney Farms, Spring Park, Camp Blanding Museum, Military Museum of North Florida, and other landmarks and attractions. Clay County Tourism should consider allotting \$20,000 to \$30,000 for this effort.
2. Opportunity exists to convert tours of the County Jail from public to private sector management. The Old Jail Museum management in St. Augustine has expressed interest in including the jail as part of a motorcoach tour and would like to head the tour operations of the facility. In addition to increased motorcoach visitation, their expertise would likely provide greater marketing exposure online, more aggressive promotion regionally, more convenient access for the visitor due to longer operational hours, and possibly greater visitor experiences. Consideration should also be given to enabling the Old Jail Museum to include the outdoor space and other venues of the Historic Triangle (Courthouse, Railroad Museum and History Museum) as part of occasional campuswide history tour activations.
3. Many DMO's and economic development groups nationally have led online and social media marketing workshops for small businesses in their destinations to educate them on how to optimize their presence in the digital landscape and to increase visitation through effective marketing on platforms such as TripAdvisor, Yelp!, Google Analytics, Facebook, Instagram, Twitter, Tik Tok, Placer AI and Arrivalist. Clay County Tourism recently worked with the Miles Partnership to establish the guidelines for this type of educational program. Local attractions and owners of key restaurants and retail stores should be invited to partake in the program in the near-term so that they can begin to manage their respective online storefronts and social media pages, maximize their online and in-person traffic levels, and also learn more about their customers' demographics and buyer behaviors.



1. Retain history-, paranormal- and family-focused influencers to showcase historic assets in Clay County.
2. Privatize management of County Jail and consider more aggressive programming of Historic Triangle campus one to several times per year, centered around County Jail experience.
3. Lead Miles Partnership program and other workshop sessions to educate local attractions and other relevant businesses on digital marketing.

Tourism Impacts	<ul style="list-style-type: none"> • Moderate
Resident Quality of Life Impacts	<ul style="list-style-type: none"> • Limited to Moderate
Implementors	<ul style="list-style-type: none"> • Clay County Tourism • Local attractions, museums and other relevant businesses • Old Jail Museum • Historic Triangle • History- and family-focused social media influencers
Total Costs	<ul style="list-style-type: none"> • \$20,000 to \$30,000 per year for history- and family-focused influencer campaigns





THE BIG IDEA

Over the next one to three years, Clay County begins to tell the story of its past, present and future to the visitor through events, festivals history influencer campaigns, and public art. Within ten years, it will have several core cultural attractions that will drive visitation and lengthen stays in the destination with the Southern Rock Hall of Fame and Amphitheater.

6C. ARTS & CULTURE: Recommendations



We have summarized the primary Arts & Culture-related initiatives and milestones for the County, placing them generally in a time sequence from near-term to long-term.



1. Evaluate Duval, St. Johns and other county approaches to arts council development and work with local artists to establish an arts council committee
2. Leverage, promote and support Fairgrounds, Thresher-Horne Center and Club Continental.
3. Develop one- to two-percent public art fund to generate significant revenue from incoming developments
4. Initiate planning for Southern Rock HOF and identify opportunities for Southern Rock trail
5. Evaluate and develop existing events and festivals
6. Work with history, family and paranormal influencers, review management of Old Jail
7. Conduct digital marketing workshops for existing museums

8. Identify "target zones" for public art development throughout County
 - Walnut Street
 - Spring Park
 - Gateway to Clay
 - Trails
 - New developments
9. Initiate planning and identify partners for Southern Rock HOF and performance center
10. Consider marketing approaches to Southern Rock

11. Develop Southern Rock HOF
 - a. Exhibits
 - b. Indoor performance space
 - c. Small amphitheater
12. Grow southern rock festival, utilize Fairgrounds and Hall of Fame
13. Develop arts district in high foot traffic area (new development, Walnut Street, or Mall)





6D | Guiding Development

6D. GUIDING DEVELOPMENT: Overview

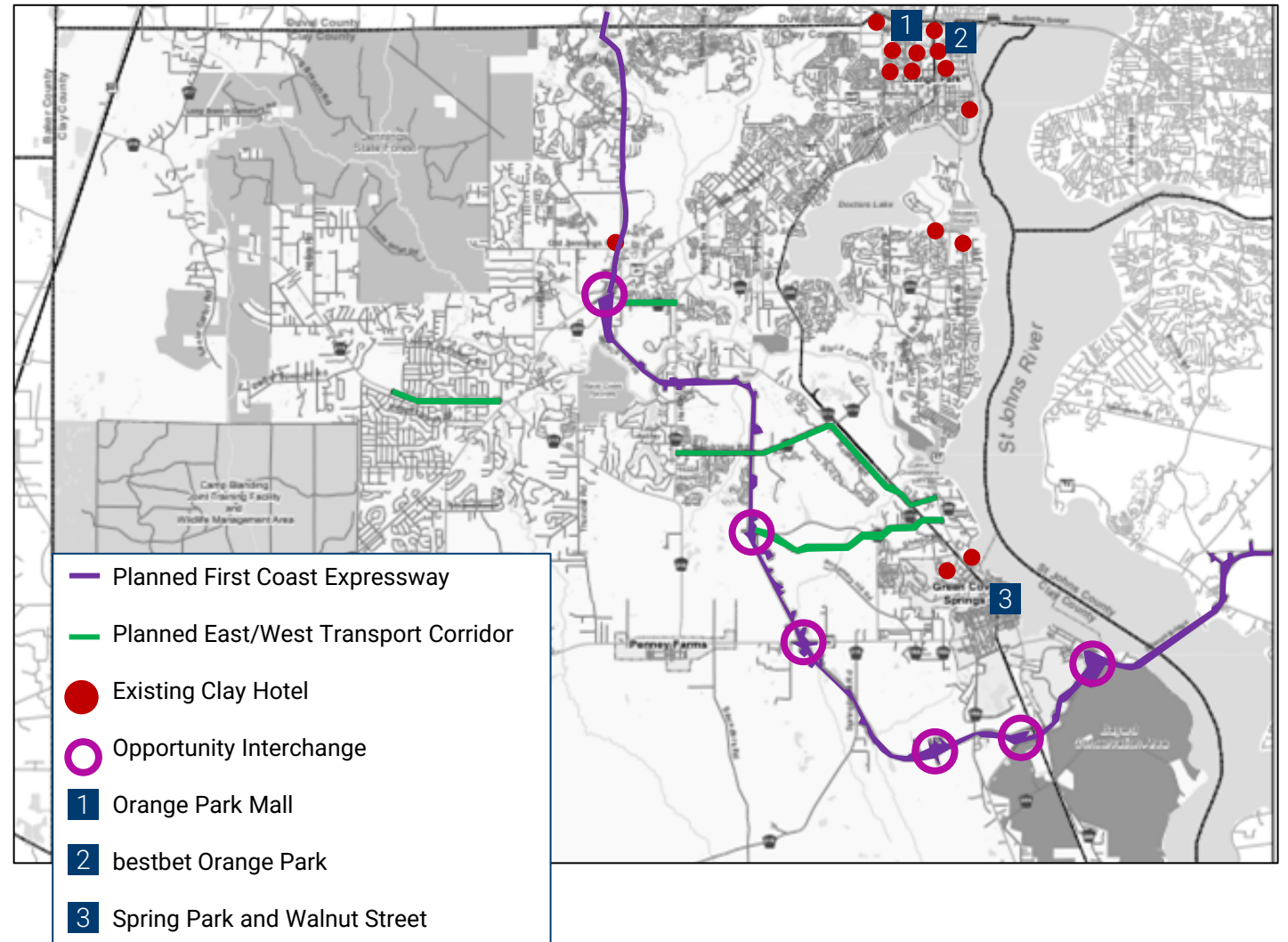
There are numerous opportunities to support brand-relevant, and in some cases unique, lodging, restaurant and location based attraction product throughout the County,

The adjacent map highlights the soon-to-be-developed First Coast Expressway, planned east/west road corridors, area hotel concentration and existing and potential future locations that can influence visitation.

Based on our conversations with county-wide economic development organizations, private developers and real estate professionals, there are several factors that will influence hospitality/tourism generating development:

- Development of First Coast Expressway and opportunities to support new projects, particularly along primary intersections. The new amateur sports complex being built near the First Coast Expressway is a first example of this type of spurred development.
- The access to population centers in St. John's County and surrounding areas created by the new Expressway.
- Limited opportunities for commercial/hospitality development on waterfront adjacent locations.
- New amateur sports venues being developed.
- Significant increases in single- and multi-family residential.

Throughout this section, we provide definition to development initiatives that represent important opportunities to grow tourism generating product in the County.

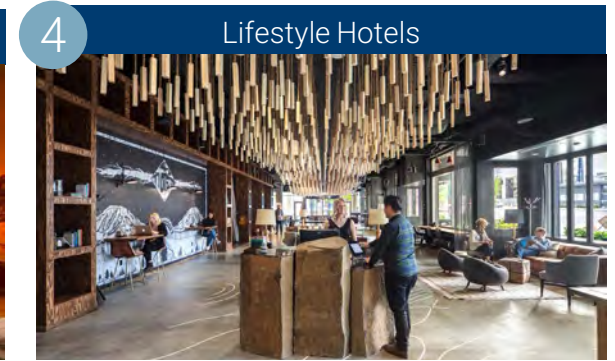
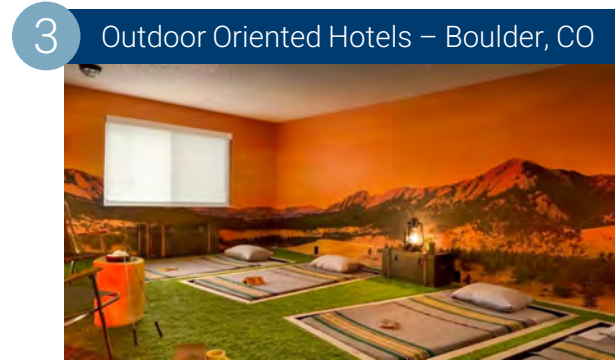
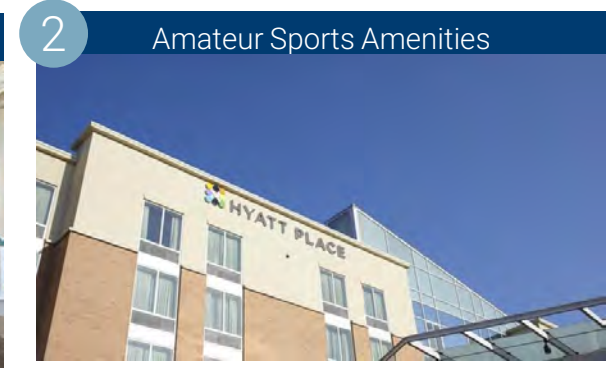


6D. GUIDING DEVELOPMENT: Hotel Vision Board

The lodging inventory in Clay County has enjoyed relatively high occupancy, with generally low average daily rates. The properties tend to be limited or select service, with several full service hotel options, primarily near the Orange Park Mall.

Significant opportunities exist to attract unique hotel concepts that may tie to a target visitor audience (outdoor, family), or more of a millennial audience (sports, brewery, outdoor, lifestyle themed). Several lodging concepts that could be supported at appropriate locations in Clay County are described below.

1. **Kid-Friendly Rooms** – Catering to an important visitor sector in Clay County, hotels with kid-friendly rooms can help support destination sales and marketing efforts.
2. **Amateur Sports Amenities** – Relevant to the projected growth in amateur sports in the County, hotel product with amenities to accommodate amateur sports teams could include space for team meetings, fitness equipment, youth-friendly arcade rooms, pool/spa and other amenities.
3. **Outdoor Oriented** – Basecamp Boulder features a common area with a climbing wall, a ping-pong table and casual seating areas, a juice bar, fire pit and other amenities focused on the outdoors.
4. **Lifestyle Hotels** – Tend to offer smaller rooms, with active common areas inclusive of bar/restaurant, pool tables, networking areas and grab-and-go food options.
5. **Brewery Hotels** – These are in a category of branded properties targeting the Millennial demographic. The Doghouse Hotel in Columbus is reflective of this concept.
6. **Tree House Concepts** – These are limited room count properties providing a very unique lodging setting. They are primarily beneficial in tying the destination brand to the outdoors.



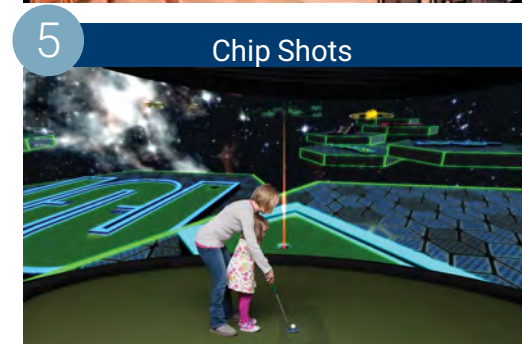
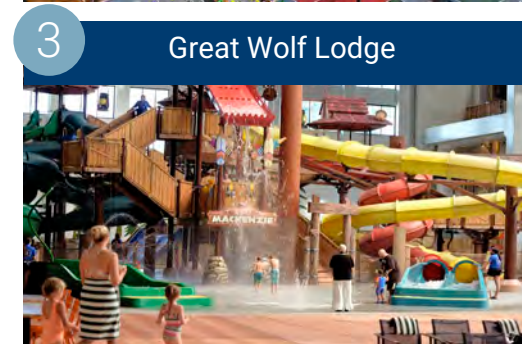
6D. GUIDING DEVELOPMENT: Family Entertainment Vision Board

Delivering entertainment experiences with immersive qualities in a location-based entertainment (LBE) setting has become a highly invested in segment of the overall entertainment economy.

These attractions have the ability to draw visitors to the County and increase dwell time and spend. In some cases, an LBE can offer meeting and event space, and potentially a base of hotel rooms at an all-inclusive family resort property such as Great Wolf Lodge.

As the age demographic and experiential preference profile of the typical visitor has changed, these types of unique attractions have become more and more mainstream. A summary of concepts that could be considered for development in Clay County include the following.

1. **Chicken N Pickle** – An indoor/outdoor entertainment complex combining a restaurant and sports bar with pickleball courts and a variety of yard games. There are locations currently throughout the US, with 3 more in development.
2. **Main Event** – A family entertainment business with 50 locations in the U.S. The attraction includes restaurants, bowling, arcades, virtual reality, laser tag, rock climbing, mini golf, gravity ropes and karaoke.
3. **Great Wolf Lodge** – A waterpark resort with restaurants, arcades and other family friendly amenities. 19 existing locations nationally.
4. **Royal Palms Shuffleboard** – An adult-themed shuffleboard club with bars, food trucks and DJ's. Locations in Chicago and New York.
5. **Chip Shots** – A golf simulator attraction with 3 pickleball courts, 6 sports simulators, bean bags on Astroturf, ping pong and a full service bar and kitchen.
6. **Cinergy** – A luxury cinema and entertainment center with 8 locations. Several locations include amenities such as arcades, bowling, axe throwing, laser tag, escape rooms, virtual reality activities and ropes courses/zip lines.



6D. GUIDING DEVELOPMENT: Dining Vision Board

There is significant opportunity for more unique food and beverage options in Clay County. The substantial leakage of restaurant spending to areas outside the County, the very high community resident survey rating for more restaurants (particularly unique waterfront locations), and feedback from regional economic development specialists support an aggressive approach from County and individual city economic development officials focused on attracting new family/adult restaurants.

Several concepts that could be supported at appropriate locations in Clay County are described below.

1. **Trend-Forward Dining** – Restaurants with an even greater focus on locally-sourced and sustainable product, an ambience and setting tied to unique aspects of the destination, and a business model with higher wages and new revenue sources.
2. **Brewery/Restaurant** – The craft brew and cocktail phenomenon will continue to grow. The concept highlights the essence of unique and local in a high-energy setting. Successful establishments often combine live music, games and other entertainment assets.
3. **Kid-Friendly Options** – Leveraging the growing family population in the County, family-oriented restaurants with playground-type amenities should be targeted.
4. **High-End Dining** – Likely a targeted demand opportunity, two to three locations in the County, ideally with waterfront access, could be targeted for a higher end culinary experience.
5. **Food Halls** – Food halls are emerging nationally as a high-density, highly active and entertaining culinary environment. The model allows for numerous local and branded establishments, live entertainment and other leisure assets.
6. **Riverfront Restaurants** – Any of the concepts described above could benefit from a riverfront or other waterfront location within the County.



6D. GUIDING DEVELOPMENT: Convention Center Opportunities

As frequently discussed by local stakeholders, meeting planners, and Visit Jacksonville, there is need for larger convention/conference facilities in the Northeast Florida region, particularly with respect to facilities that can offer contiguous rooms of 20,000 or more square feet of event space. Given the material market demand measured, a convention-quality event space of this size in Clay County would be a substantial hotel room night producer for the region, likely with the potential to generate between 10,000 and 20,000 room nights per year.

Convention/conference facilities in smaller markets with 20,000 square feet or more of contiguous event space are often owned and paid for by the public sector. Hotel partners will often pay to develop properties that are adjacent to these centers and may often pay for a small minority of the convention/conference facilities' costs. Though, given escalating labor and materials costs, even smaller high-finish, state-of-the-industry convention/conference centers can cost upwards of \$100 million. Considering the costs of many other initiatives throughout this Plan, it is not recommended to pursue a major standalone convention project within the next ten years.

However, opportunity still exists to add a significant convention/conference facility to the market through partnering with interested resort developers who are considering building in Clay County. In many cases, resort developers such as Kalahari Resorts or Great Wolf Lodge will include anywhere between 20,000 to 100,000 square feet of meeting and event space and have occasionally worked with communities in the past to build an "oversized" event space that generates significant economic impact and an overflow hotel room nights. This often requires a portion of funding from the public sector, but not to the same degree of cost associated with a standalone convention/conference facility.

In the long-term, should a resort property and adjoining convention/conference center fail to develop in Clay County within the next ten years, consideration could be given to developing a convention center within an existing or future walkable, highly vibrant district in the destination. Two potential sites are further explored within the subsequent Chapter.

Traditional Standalone Convention Center



Event Space at Great Wolf Lodge Resorts



6D. GUIDING DEVELOPMENT: Tool Kit Examples

Each of the concepts shown on the previous pages should be introduced to developers considering investing in Clay County, and they should be inspired to plan more unique, vibrant developments for the benefit of both their real estate values and the broader community. To help incentivize these types of projects, there are numerous “tools” used by communities throughout the country to help support desired development that benefits the visitor industry and the resident. Efforts to secure unique local restaurants, retail, entertainment and lodging projects can benefit from various forms of incentives and assistance.

Large-scale public sector support mechanisms can include tax increment financing and tax abatements (including property, hotel and other taxes), land contribution, infrastructure improvements, parking development and other major initiatives designed to help fund portions of the overall project costs. The tax incentive options in particular could be useful in Clay County, allocating tax revenues that would not otherwise materialize without the existence of the project itself.

There are also numerous more modest programs that have been used throughout the country, designed to help spur development that can create greater destination vibrancy that benefits the visitor and resident base. Several of these could be considered for implementation in Clay County and the various communities throughout the County.

- Revolving Loan Fund – These programs provide development and operational capital for businesses seeking to locate into an area targeted by the community for increased density. Loans are offered at low interest rates (2 percent to 3 percent), with payback periods of up to 10 years. Loan amounts can range from several thousand dollars for specific operational or marketing needs, to tens of thousands of dollars for project development needs. Risk levels for these loans are typically above those for traditional bank loans, however various forms of collateral (including project equity) are typically required for revolving loan participation. Funding for the loan program can be provided from private/foundation sources, or public sector participation at the local, state and/or federal level. The loan disbursements will then “roll over” as business owners make payments. It will be important to establish some form of loan review committee, with responsibilities to protect the base capital amount as carefully as possible, while providing loans that can positively impact the restaurant, retail and entertainment assets that can grow the visitor base and improve quality of life for residents.
- Grant Program – Grant programs are typically provided to businesses and/or property owners for project development costs, often capped at a percentage of the private investment amount or a nominal dollar figure. Funds could also be used for legal, architectural, engineering and other support initiatives. Criteria for awarding grants can include potential for job generation, level of local ownership, projects that are unique to the destination (non-chain), location of the project in defined need areas, etc.



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6D. GUIDING DEVELOPMENT: Tool Kit Examples (cont.'d)

- Developer/Business Assistance Program – A business attraction effort can benefit from the availability of various forms of tenant technical assistance. These efforts can help a potential business (or developer) navigate various public sector requirements related to permitting and licensing, as well as interaction between tenant and building owner including the site selection and lease negotiation process.
- Facade Improvement Program – These can be grant or loan-based programs, with a goal of retaining and improving the front face of buildings in important walkable districts. The programs can provide straight grants, or can match some portion of private investment. These programs can help facilitate elimination of non-historic additions, provide structural improvements, enhance beautification and support development in other relevant ways. Projects should be considered for structures in defined areas that tend to support smaller scale retail, restaurant, entertainment and other commercial businesses.
- Fee Waivers – In some cases, local permitting and other fees can cause challenges for local entrepreneurs with relatively little capital. It may be useful to consider a waiver program for qualifying targeted businesses that can add to unique and authentic restaurant, retail and entertainment development.
- Character Protection Programs – Many communities take proactive steps to ensure that the character of particular districts is maintained. In many cases, programs are adopted that discourage chain businesses that may push out unique local establishments. In other cases, policies are used to discourage businesses that may not fit the character of the area (a light manufacturing business in an emerging hospitality district, for example). Consideration of such programs should be given in Clay County, likely managed by individual communities rather than on a County-wide basis.



The images on the following page reflect the potential that exists with respect to unique development in areas of food and beverage, retail, hotel, attraction and other hospitality-oriented projects. Over time, the successful placement of these types of projects in targeted, dense (and ideally in many cases on the water), could help create a “reason to linger and spend” among visitors from neighboring counties, from throughout the region, those attending events, and those that may find themselves in Clay Country for any variety of reasons.

It could be just a drive over the First Coast Expressway bridge for a dinner, or a family staying in town for several days attending a youth sports event. In competing for any visitor base, the ability to actively support unique and authentic hospitality-oriented development should be a significant priority for County and City economic development organizations.





THE BIG IDEA

Future development spurred by First Coast Expressway and continued population growth in Clay County includes a variety of trend forward hotels and restaurants and emerging forms of location-based entertainment, making the area a highly desirable place to live, work and visit.

6D. GUIDING DEVELOPMENT: Recommendations



There are numerous specific action items that the County and local communities will have to undertake as part of implementing recommendations presented herein. Many of these are relatively simple to implement, requiring little or no funding; and others will represent significant initiatives that involve public/private partnerships and targeted public investment. We have summarized the primary initiatives and milestones for the County and local communities, placing them generally in a time sequence from near-term to long-term.

1. Establish tourism development and character protection committee(s).
2. Partner with building owners to help fill vacant storefronts with entrepreneurs in the restaurant, retail and other hospitality sectors.
3. Develop a communications approach targeting private developers that highlights the County's desire for unique restaurants, breweries/distilleries and location-based entertainment.
4. Advocate for near-term East/West transportation corridors connecting First Coast Expressway.
5. Work with the development community to identify desired locations for future hotel development, with priority for emerging/lifestyle brands, and location near Regional Park and outdoor assets.
6. Begin discussions with major attraction developers.
7. Identify incentives that can be offered to major attraction developer(s).
8. Consider advancing the Walnut Street Plan with an eye towards the visitor industry: public art, nighttime activation, unique restaurant, green space development.
9. Finalize a set of incentives or a "tool box" to help attract unique restaurants, breweries/distilleries and location-based entertainment.
10. Select site for major attraction/resort property.
11. Prioritize/incentivize development of convention or conference space as part of any new attraction/resort.
11. Major attraction/resort opens.
12. Incorporate attraction/resort within marketing to traveling sports and adventure families.
13. Walnut Street redevelopment completed.
14. Create marketing focus for Walnut Street.
15. Consider long-term opportunities to develop a convention center.





6E | Long-Term Visioning

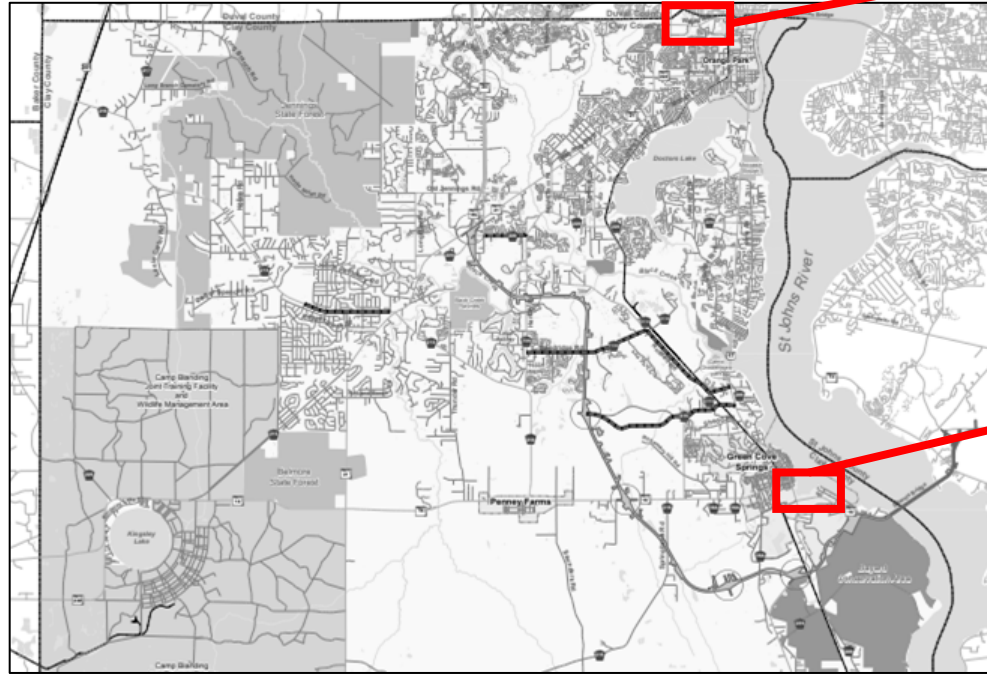
6E. LONG-TERM VISIONING: Reynolds Park

In most markets, there are a small number of large acreage, undeveloped or underdeveloped parcels that are located in what could be highly visible, desirable, accessible areas. In Clay County, Reynolds Park, and potentially the bestbet site and surrounding areas represent these type of development opportunities.

Development on either or both of these sites have to be considered long-term opportunities. Reynolds Park will present significant contamination and other environmental challenges, as well as the challenge of working with several federal agencies and private land owners. The bestbet site houses an operating business including gaming and entertainment with significant surface parking.

The bestbet site also can be considered underdeveloped, with significant opportunity for future location based entertainment and hospitality density. Longer term, development of an expanded site area towards St. Johns River could be considered.

The following page provides a vision board highlighting the types of hospitality, green space, event, water-based, residential, commercial and other development that could take place on both sites as part of transformational mixed-use projects.



Source: Google, 2022.



6E. LONG-TERM VISIONING: Waterfront Vision Board

Riverwalk



Water Activities



Retail



Unique Restaurants



Kid-Oriented Activities



Hotel Offerings



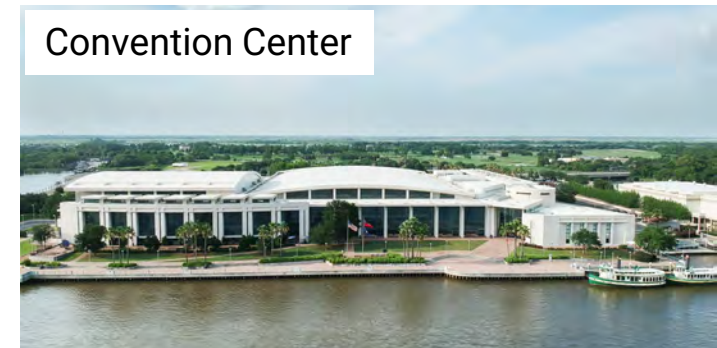
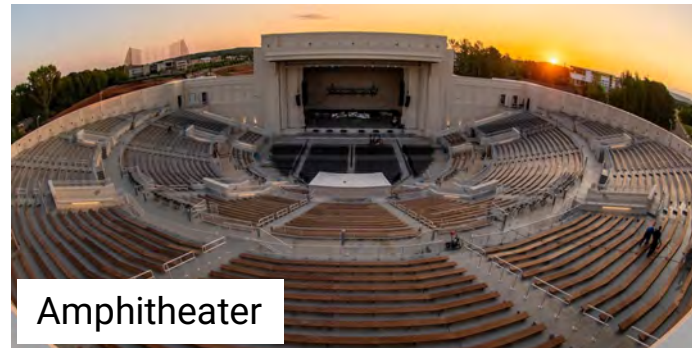
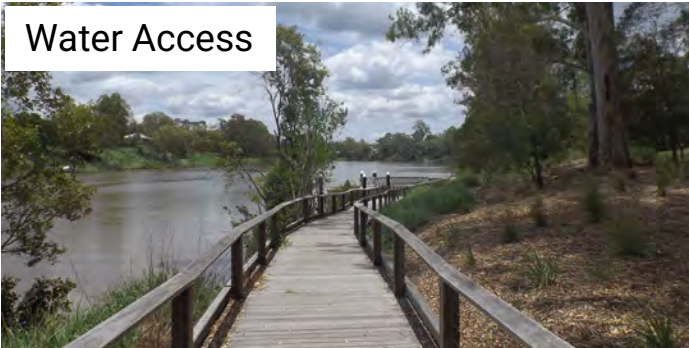
Condos



Concert Venue



6E. LONG-TERM VISIONING: Recommendations



The long term vision projects will require patience, consistent leadership, and a broad vision that can bring a variety of stakeholders together in a collaborative process. Projects of this type can “simmer” for several years, before experiencing phases of significant progress.

It will be critical for the County to consider these types of transformational projects as central to the growth of the visitor sector and residential development.

A broad summary of the project concept, planning and development steps that will need to be addressed are summarized to the right.

1. Identify local stakeholders that should be involved in initial planning discussions for targeted large scale sites. Focus on identifying a planning leader or champion that can keep project momentum on track.
2. The stakeholder group with County staff should identify a timeline for major project milestones, including necessary governmental approvals, public funding sources (particularly for environmental remediation), parcel acquisition/control, and other major planning initiatives.
3. Once public sector stakeholders have coalesced around a potential project vision, efforts to identify governmental agencies and/or private sector owners that will have to be included in project development initiatives should be undertaken.
4. Once a path for future development begins to solidify, develop initial viability research for specific project components including residential, retail, event space, marina, hotel, attraction, public park space, location-based entertainment/attraction, and other elements that help attract visitors and benefit local quality of life.
5. Working with stakeholders, retain planners to develop very early conceptual plans for the sites. Undertake a plan to solicit broader public sector input into project priorities.
6. Continue to develop public/private sector funding plans. Depending on site ownership, consider various request for development proposals from the private sector.



6F

Tourism Promotion



6F. TOURISM PROMOTION: Abstract

Over the last six months, BlackDog Advertising (BDA) had the privilege of collaborating with CSL, Clay County Tourist Development Council (TDC) and a team of dedicated Clay County stakeholders that truly care about producing a sustainable, quality tourism product for years to come. BDA reviewed the current destination marketing efforts and utilized a 360-degree approach, providing a set of actionable marketing strategy recommendations to execute in the next five years. Our strategy gives each year a unique milestone to strive for and is scalable to accommodate the growing number of attraction products and hotels coming online in the next few years. The strategy is not only about achieving the end goal of generating more tourism but also about building a self-sufficient, balanced marketing program that is less dependent on variables and mitigates risk from future changes in external market demand.



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6F. TOURISM PROMOTION: TDC Evolution

The graphic below highlights the current stage of Clay County's tourism promotion efforts. Clay County Tourism has successfully laid a foundation upon which to lead significant initiatives that will help the destination maximize its visibility and authenticity within the travel industry. Now, efforts must be made to further establish the brand identity and lead a five-year tourism promotion plan. A year-by-year action plan is presented on the following pages.

1. Set the Foundation

2. Brand Identity v1 –
We Are Here

7. Capitalize on Destination
Brand Recognition

3. Adapt Brand to Five-
Year Plan

4. Build a Larger Database

5. Generate New
Incremental Demand

6. Deliver on the Promise



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6F. TOURISM PROMOTION: 2023 Action Items

Optimize Existing Digital Marketing Efforts

Reduce Audience Size and Locations for Digital Ad Campaigns

Focusing on a one- to two-hour drive radius for the 2023 digital ad campaigns will increase saturation and brand awareness across an estimated audience size of one million people. To make a lasting impression and influence travel planning decisions, the target audience needs to see your brand at least seven times.

Primary Target Markets

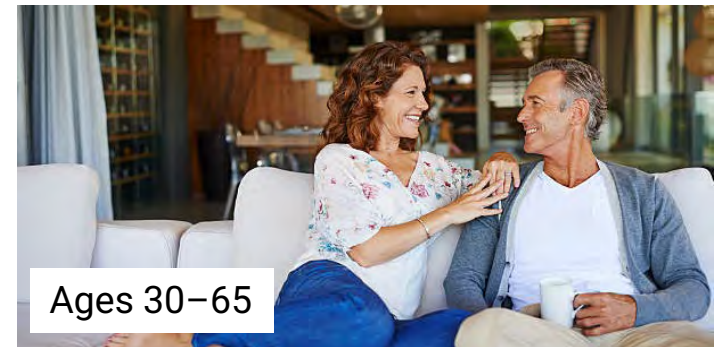
- Orlando, Gainesville, Jacksonville DMA residents
- One- to two-hour drive

Primary Target Demographics

- Males and females aged 30–65 who are
- Outdoor enthusiasts
- Golfers
- But not focusing on families specifically
- Clay County is a family-friendly community, but targeting families for marketing is not a priority for 2023

Primary Target Audience Size

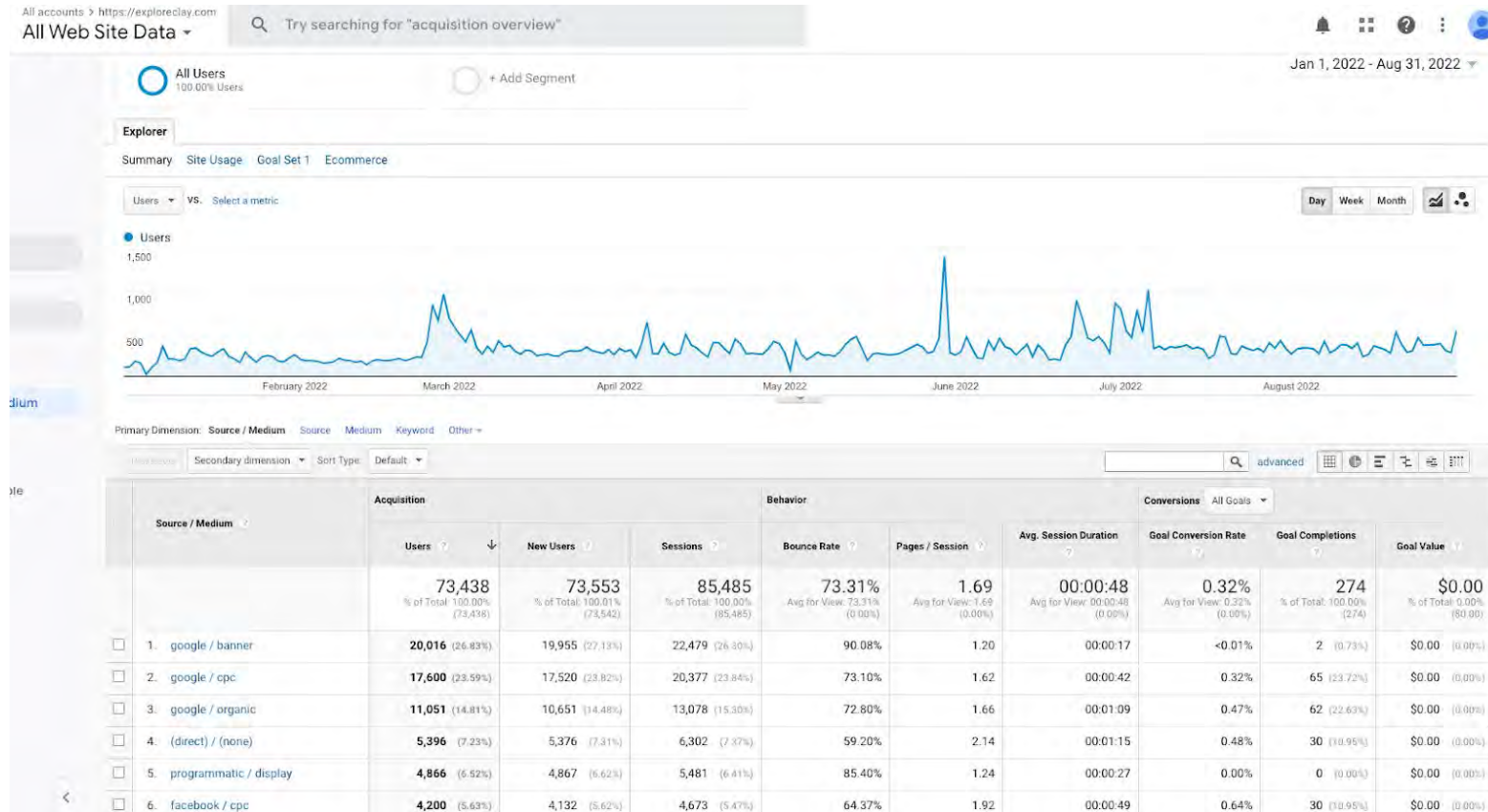
- Total population = 2MM
- Target audience goal = 1MM
- Annual digital frequency goal = 36X (3X per month)
- Digital impressions goal = 36MM



6F. TOURISM PROMOTION: 2023 Action Items

Transition Media Plan to Include More Google Search and Paid Social Media/Less Display

Paid Google search and paid social media advertising placements target people that are most likely to engage with your message. Exploreclay.com Google Analytics from 2021–2022 show below average engagement metrics from paid advertising campaigns (Appendix A). Moving forward, more focus should be placed on quality of the target audience vs. quantity of impressions. People searching Google for budget-friendly accommodations near Jacksonville and St. Augustine would be a great example of new, qualified traffic for 2023.



6F. TOURISM PROMOTION: 2023 Action Items

Create a More Robust Lead Generation Funnel for Website Visitors

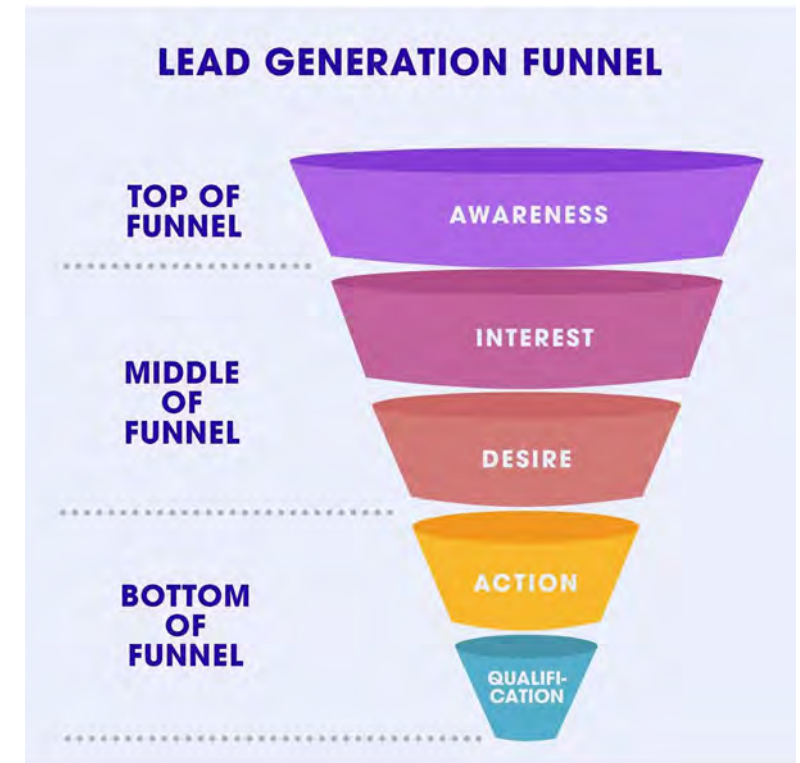
The future of digital advertising will rely heavily on [first-party data](#). Exploreclay.com should be the central hub for collecting contact information for potential guests planning to visit northeast FL. [Visit Destin/Fort Walton Beach](#) offers family adventure packages that can be booked directly on the website in addition to live chat with local moms. This is a great example of how a DMO should entice target audiences to engage and submit their contact information. Other examples include exclusive deals, coupons, special event notifications and contests. Here's an example of a nationwide social media contest from Historic Tours of America that generated 2MM impressions and increased sales from the [email database by 92% YOY](#).

Create New Direct Response Lead Generation Advertising Campaigns

Once Exploreclay.com features more engaging ways of collecting information from the target audience, new advertising campaigns should also include direct response messaging targeting more contacts in the marketing database. Golf campaigns would include calls to action for exclusive packages, tee times or tournaments. For example, [Pierce County, WA](#) utilized digital advertising campaigns to directly drive 4,500 hotel night bookings and direct response leads. Pierce County, WA used streaming video placements to target and inspire potential Seattle visitors to stay in Pierce County and tracked all the bookings with a custom pixel for attribution.

Grow Opt-In Email and Phone Database by 3,000 Contacts/Month from Key Markets

During the first few months, expect to add 500–1,000 new contacts, but as the campaign is optimized in 2023, the goal should be 3,000 per month. By the end of 2027, Exploreclay.com will have collected 175,000 contacts in the database from north–central Florida and Georgia. Collecting and nurturing over 100,000+ contacts in your database will allow your marketing team to generate self-sustaining demand and connect with loyal travelers via email and SMS. In addition to reaching your database directly via email and SMS, Exploreclay.com will also be able to upload the lists to all the digital ad platforms to create [custom target audiences](#) and lookalike audiences on Facebook, Google and more.



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6F. TOURISM PROMOTION: 2023 Action Items

Invest in SEO Metadata Optimization for All Existing Website Pages

Organic SEO is more of a marathon than a sprint. The first step to growing free organic search traffic from Google and Bing is updating all the metadata across the Exploreclay.com website. Currently, the website does not have optimized meta titles and meta descriptions on each page. For example, the “Where to Stay” page has a meta title of “Lodging Archive - Clay County” and no meta description. These metatags are essential for search engines to rank your website in their results. Ideally, the “Where to Stay” page would include a meta title such as “Hotels Near Jacksonville, FL - Explore Clay County.” This type of metadata optimization needs to happen across every page on the website.

Revise Google Paid Search Keyword, Targeting More Overnight Visitors

Based on 2022 YTD Google Ads reports, 40% of paid search traffic was generated by broad match fishing- and hiking-related search terms (Appendix B). Using a broad match keyword strategy like this is recommended more for local in-destination campaigns and “near me” targeting. This is where the person searching Google is looking to visit a place very close to their current physical location, within 5–10 miles. Moving forward, the Google paid search campaigns should be reconfigured to target more overnight visitors searching for places to stay and things to do “near Jacksonville” and “near St. Augustine.” Potential overnight visitors will be using “Jacksonville” and “St. Augustine” specifically during their research on Google to plan a vacation.

Google Ads Insights

Jan 1, 2022 - Aug 31, 2022

Google AdWords: Summary of Search Keyword Performance

Objective: Summarize Impressions, Clicks and CTR by Keyword

Campaign name	Ad group name	Keyword text	Clicks	Impressions	CTR
1. Events/Fairs/Activities	Events/Fairs/Activities - Phrase	clay county events	1,459	7,123	20.48%
2. Fishing	Fishing - Phrase	places to go fishing	930	8,363	11.12%
3. Wedding/Event Venue	Wedding/Event Venue - Phrase	event venue	838	10,733	7.81%
4. Fishing	Fishing - Phrase	fishing spots	743	7,327	10.14%
5. Events/Fairs/Activities	Events/Fairs/Activities - BMM	+clay +county +events	698	3,530	19.77%
6. Fishing	Fishing - BMM	+fishing +spots	676	6,625	10.2%
7. Places to Stay & Camping	Places to Stay & Camping - Phrase	camping in florida	552	9,717	5.68%
8. Outdoor Activities	Outdoor Activities - Phrase	trail	520	8,709	5.97%
9. Fishing	Fishing - Phrase	places to fish	485	3,953	12.27%
10. Outdoor Activities	Outdoor Activities - Phrase	hiking	408	6,687	6.1%
11. Events/Fairs/Activities	Events/Fairs/Activities - Exact	clay county events	405	1,180	34.32%
12. Fishing	Fishing - Exact	best fishing spots near me	380	2,948	12.89%
13. Wedding/Event Venue	Wedding/Event Venue - Phrase	wedding venue	366	5,051	7.25%
14. Events/Fairs/Activities	Events/Fairs/Activities - Exact	things to do in clay county	308	1,023	30.11%
15. Springs & Water Activities	Springs & Water Activities - Phrase	river cruises	296	2,195	13.49%
16. Golf	Golf - Phrase	golf course	289	5,629	5.13%
17. Springs & Water Activities	Springs & Water Activities - Phrase	kayaking	253	6,369	3.97%
18. Outdoor Activities	Outdoor Activities - Phrase	bike trails	248	3,254	7.62%
19. Wedding/Event Venue	Wedding/Event Venue - Phrase	rental event space	236	2,460	9.59%
20. Fishing	Fishing - Exact	where can i go fishing near me	232	2,041	11.37%



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6F. TOURISM PROMOTION: 2023 Action Items

Transition to Google Analytics 4 or Similar Analytics Software

Exploreclay.com and other Clay County .gov websites use Google Analytics to track website visitor behavior and digital advertising campaigns. Universal Analytics will stop recording data on July 1, 2023. Shortly after, the data will be deleted and not available for historical records. It's imperative that all the historical data from Google Analytics be backed up and exported from the platform before June 2023. In addition, Clay County should implement GA4 across all its website properties as soon as possible to start recording new data. Read more about the differences between [Google Analytics 4 and Universal Analytics here](#).

In addition to the GA4 transition, Clay County should consider investing in a paid website analytics software, such as Adobe Analytics or Matomo, which allows your business to own the website analytics data and store the data forever.

Create TikTok, Pinterest and Instagram Profiles to Accompany Facebook

Social media platforms are more influential than ever for discovering travel inspiration. Travelers of [all ages and demographics](#) turn to social media for advice on where to go and what to do next. They gather information from friends, hashtags, trending content, and even travel hack videos. Social media platforms such as Instagram and TikTok are here to stay, and it's imperative that Clay County create dedicated channels for each platform and post regularly.

Create Editorial Calendar for TikTok, Instagram, Pinterest and Facebook Content

New platforms and audiences require fresh content. Invest in a comprehensive social media [editorial calendar](#) and create content for each channel. It's okay to post the same content on multiple platforms, and it's encouraged; however, the content may need to take different forms. For example, a Facebook Event post may need to be repurposed into a short "Things to Do This Weekend" video for TikTok and Instagram Reels to reach the target audience effectively.



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6F. TOURISM PROMOTION: 2024 Action Items

Build Toward New Identity

Convert Day Trippers Into Overnight Guests

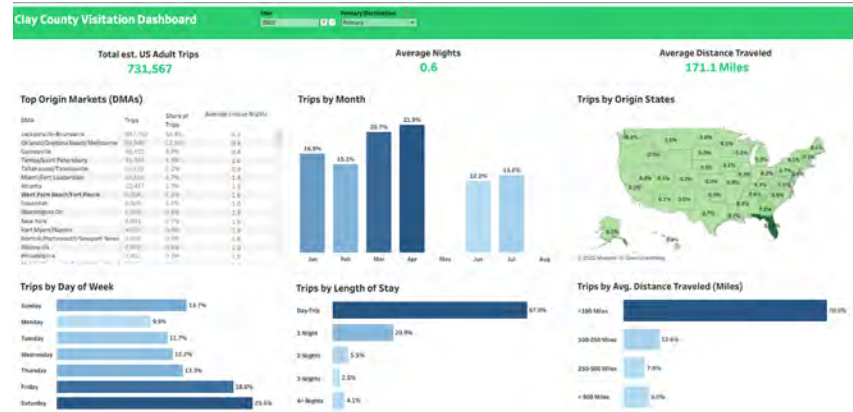
With the proper strategy and marketing execution, there is a great opportunity to capitalize on day trip visitors and convert them into overnight guests.

Data that supports investing more in marketing to day trippers before they're planning to visit:

- Between 2021 and 2022, an average of 85% of US adult trips to Clay County were day trips or one-night stays (Appendix C).
- 47% of the total trips to Clay County originated from Orlando/Jacksonville/Gainesville residents, but only accounted for 24% of the total room nights (Appendix D).

Campaign ideas to inspire day trippers to stay overnight in Clay County include:

- Stay & Play packages (golf, concerts)
- Weekend getaways (golf, concerts, outdoor adventures)
- "Stay in Clay" campaign targeting people planning Jacksonville and St. Augustine vacations and looking for more budget-friendly accommodations



2021	Total Room Nights	% Rooms	Total Trips	% Trips	Orlando/Jax/Gainesville Trips	Orlando/Jax/Gainesville Nights
Orlando/Daytona Beach/Melbourne	110,034	19%	128,921	28%	47%	24%
Tampa/Saint Petersburg	80,151	14%	47,405	10%		
Miami/Fort Lauderdale	29,285	5%	14,995	3%		
Atlanta	28,991	5%	13,082	3%		
Tallahassee/Thomasville	23,752	4%	31,750	7%		
West Palm Beach/Fort Pierce	22,034	4%	9,620	2%		
New York	18,126	3%	10,487	2%		
Savannah	16,970	3%	14,833	3%		
Jacksonville-Brunswick	16,128	3%	57,464	12%		
Gainesville	14,714	2%	34,689	7%		



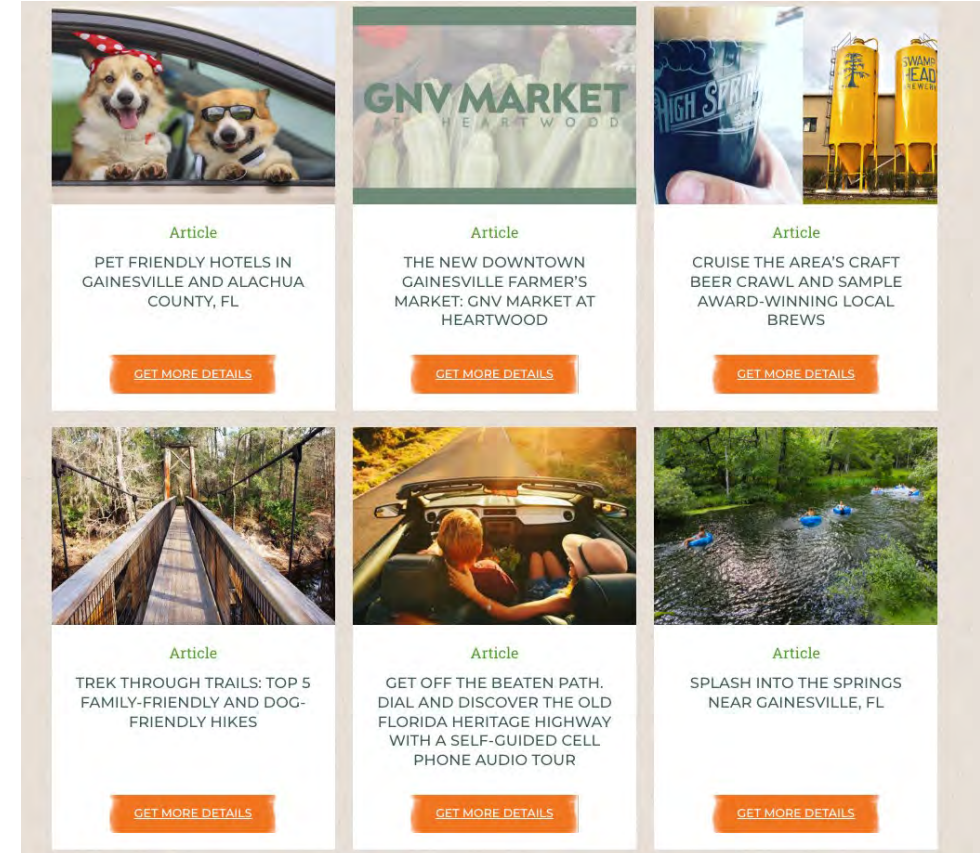
6F. TOURISM PROMOTION: 2024 Action Items

New RFP for Rebranding and Present Concept for Approval

- Engage a qualified branding firm to refresh the current Clay County branding to be in step with the direction of the County's 2027 plan.
- As part of the brand refresh, update the tagline and messaging to reflect the future direction.
- Develop detailed brand guidelines that include the logo, color themes and tone of voice.
- Work with your marketing firm partner to develop a detailed marketing plan that focuses on consistent messaging throughout all channels.

Become an Authority on Northeast Florida Travel Content

Create inspiring, evergreen digital travel planning guides on [Exploreclay.com](https://www.exploreclay.com) targeting people searching for things to do near Jacksonville and St. Augustine. The initial website content canvas should include more than 100 topics. Once each topic is approved, the guide will be produced and published on [Exploreclay.com](https://www.exploreclay.com) to increase website traffic from organic Google Search. In addition to increasing website traffic from search engines, the travel guides will be shared on social media and included in the social calendars every year. As an example, BlackDog Advertising and Boston Tea Party Ships & Museum generated a 41% increase in free organic search traffic from historic and travel content [published in their research library.](#)



[Visitgainesville.com](https://www.visitgainesville.com) Travel Content Targets Things To Do In The Nearby Region



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6F. TOURISM PROMOTION: 2024 Action Items

Build More Links to Exploreclay.com Through New Travel Content and Event Partners

One major area of digital marketing where Exploreclay.com trails the comp set by a wide margin is in building new links to the website (Appendix E). There are three main strategies for building more links to the website on a regular basis:

- Publish new travel guides and unique content that earns links from media and bloggers.
- Become the online hub for events, calendars and event registrations.
- Create web pages for grants, scholarships and .edu outreach for organizations to link to.

One example might be to publish grants for groups and sports tourism directly on Exploreclay.com to encourage organizations to link and bookmark that same web page on an annual basis. If this is a strategy you plan to execute, it's important to keep the web page URL the same and avoid changing it month to month or year to year.

Metrics	exploreclay.com	www.floridashisto...	visitrutherfordtn...	www.visitkenosha...
Domain Authority	27	57	36	45
Spam Score	5%	1%	1%	2%
Total links	12,417	247,572	63,495	646,661
% of total links, external + follow	3%	30%	18%	81%
External, followed links	416	75,114	11,373	521,330
Internal, followed links	11,820	160,222	50,934	117,167
External, nofollowed links	181	12,236	1,188	8,164
Internal, nofollowed links	0	0	0	0
Total linking domains	185	4,377	414	1,494
Followed linking domains	127	3,588	280	987



6F. TOURISM PROMOTION: 2024 Action Items

Create Dedicated Landing Pages and Lead Gen Funnels for Different Audiences

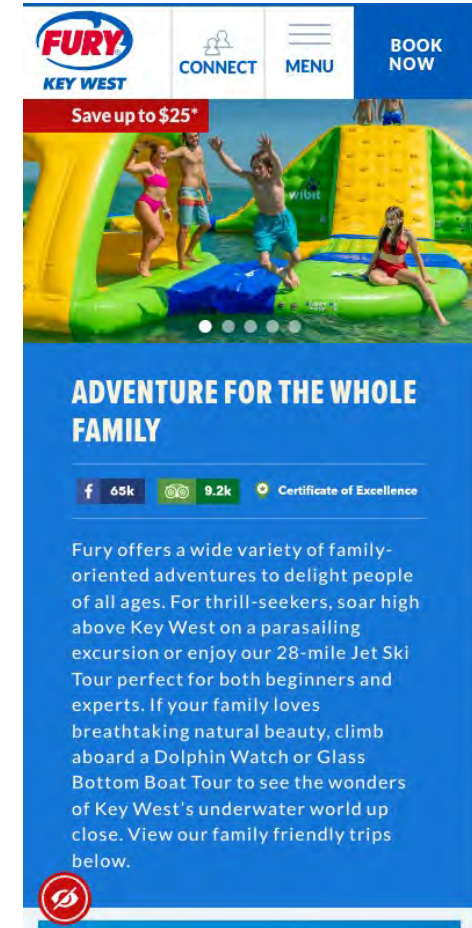
Once Exploreclay.com starts collecting thousands of leads each month, the next iteration of the lead generation strategy utilizes personalization to increase engagement with the target audience. Exploreclay.com needs new dedicated landing pages that inspire people to act. Example landing pages and target audience personas include:

- Hikers
- Fitness buffs
- Golfers
- Fishing
- Weekend getaways

It will be imperative for the future success of digital marketing to create truly inspirational landing pages that “sell” your hiking trails or fishing spots better than even the local businesses could do themselves. These pages will generate more leads and drive increased visitation in the long term.

Test New Paid Advertising Campaigns Using Rebranded Concepts

Towards the end of 2024 and into the beginning of 2025, digital advertising campaigns should launch that A/B test and the new branding concept vs. the previous one. In real time, test how the new concepts perform vs. the old with campaigns on Facebook and Instagram. The test data should guide your team on any shortfalls and where to improve before launching for the remainder of 2025.



[Link To Family Adventures Landing Page Example](#)



6F. TOURISM PROMOTION: 2025 Action Items

Adopt New Common Visual Brand Identity Architecture

Year 3 brings about sweeping changes to the brand and all associated marketing touchpoints. Adopting the new brand identity includes executing all the following tasks and more:

- Create and distribute new brand book.
- Change all digital and hard logo placements to the new brand identity, including printed materials, facility signage, trade show materials and all digital placements.
- Secure appropriate trademarks.

Create a List of Purposeful, Brand-Specific Partnerships for Outreach and Development

Along with adopting the new brand identity comes new partnership opportunities. Further the brand by creating a list of potential partners across Florida and the United States that specifically align with the new Clay County tourism mission and vision. Connect with the potential partners and create new relationships with the goal of driving group tourism in years to come.

Develop Paid Advertising Platform for Local Businesses to Increase Visibility on Exploreclay.com and Other Marketing Initiatives

Larger DMOs and TDCs offer self-service website publishing platforms for local business partners and sponsors to update their content, submit social media ideas and increase visibility through paid campaigns. 2025–2026 would be a good time to consider a new robust DMO website platform to manage the database and content growth for the future.



6F. TOURISM PROMOTION: 2026 Action Items

Expand Reach

Expand paid advertising reach 3X + allocate larger share of TDC budget to paid advertising

Primary Target Markets

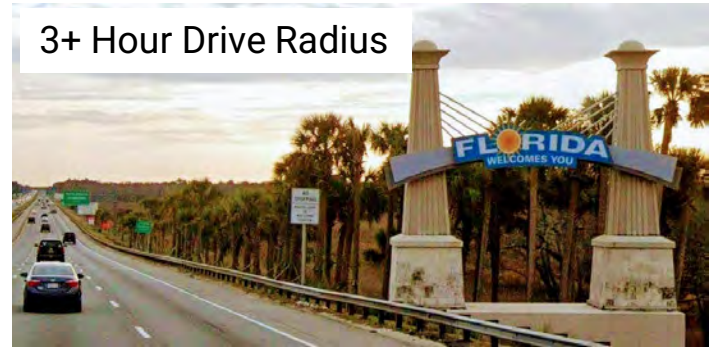
- Tampa, Tallahassee DMAs + State of Georgia
- 3+ hour drive

Target Demographics

- Outdoor enthusiasts
- Fitness buffs
- Golfers
- Parents with school-aged children (amateur sports, outdoors)

Target Audience Size

- Total population = 6MM
- Estimated target audience = 3MM
- Annual digital frequency = 36X (3 times per month)
- Estimated digital impressions = 108MM



6F. TOURISM PROMOTION: 2026 Action Items

Expand Paid Advertising Reach 3X

In line with the plan to expand offerings of things to do in Clay County entering 2026, the marketing plan is designed to match these offerings with an increased tourism advertising budget and geofenced targeting audience that now will include the Tallahassee DMAs and the State of Georgia. This will help Clay County capitalize on a predicted increase in travel interest. In 2021, Florida's Historic Coast allocated 40% of the total paid advertising budget to digital campaigns and generated 80MM digital impressions.

Allocate Larger Share of Total TDC Budget to Paid Advertising Campaigns

With construction of new things to do underway, 2026 also includes an increase in the budget allocated to paid advertising. This will also help support the increased advertising reach without having to move the budget from one audience to another.

Develop Dedicated Paid Digital Campaigns for New Markets

With an expanded paid advertising reach, it will be important to develop new campaigns that speak directly to these new audiences. Dedicated campaigns that speak to the audience you are targeting will increase the overall effectiveness and conversion rate of your campaigns. These new campaign assets should include, at least, new videos for each persona and geolocation, unique email creative, as well as website landing pages. Finally, it is important to offer new packages and promotions that will appeal to the expanded target audiences. Destination Gettysburg was able to drive 23% YOY growth in room night demand with paid digital advertising campaigns.

Maintain and Engage Database of 100K+ Email and Phone Contacts from Key Markets

In 2026, it will be important to continue to maintain and grow the email database that has been built over the last three years. It is important to clean up and segment your list as you go by, removing any emails that have opted out or are unengaged. Invest in database cleanup tools such as Webbula to remove old expired email addresses and potential spam. In addition, work in re-engagement email campaigns to attempt to spark their interest in Clay County again – particularly with the launch of new things to do.



6F. TOURISM PROMOTION: 2026 Action Items

Increase Grants, Sponsorships and Partnerships That Directly Align With New Identity

In addition to an increase in tourism advertising spending, the plan for 2026 is to increase grants, sponsorships and partnerships. It is recommended to increase partnerships that align with the new identity that Clay County would be taking on at this point in the five-year plan. With the new draws of things to do in Clay County, this should also bring new grant, sponsorship and partnership opportunities. Planning for these new partnerships can begin in mid to late 2025.

Consider Billboards and OOH Placements on Key Interstates and Thoroughfares

With the increased tourism advertising spend and the important new overnight drive market audience, it would be valuable to consider adding billboards and other out-of-home advertising placements on key interstates and thoroughfares to reach this audience. These placements are recommended once saturation is achieved (100MM Impressions) on the higher conversion, direct response digital advertising placements.



6F. TOURISM PROMOTION: 2027 Action Items

Generate New Demand

Increase Market Share of Overnight Visitors in Northeast Florida

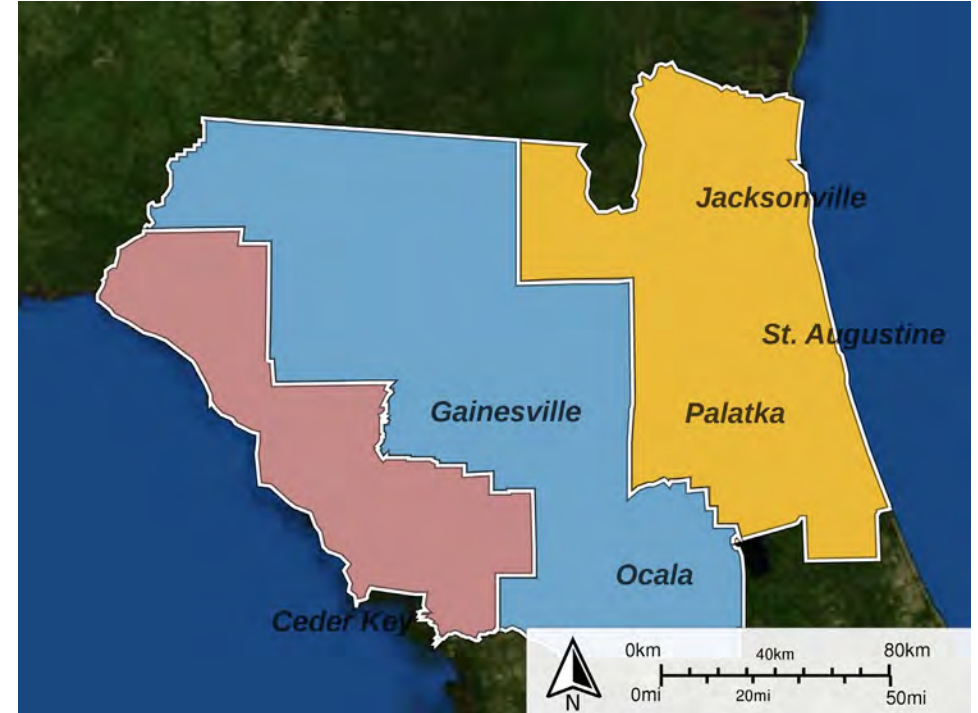
The goal of 2027 is to start seeing the outcome of the new marketing expansion from 2026 and continue to grow incremental demand. At this point, new markets will be exposed to marketing campaigns for 6–12 months. Historically, the rule has been that a potential customer needs to see your campaign at least seven times to make an impact and influence a decision. By 2027, shorter attention spans and more digital competition will likely increase that rule to 10 or 12. For this reason, the increased advertising spend from 2026, and continued increase in 2027, will start to show with an uptick in demand for 2027.

Align Clay County With Notable Outdoor Fitness and Recreation Brands

Uptick in tourism and exposure of Clay County's new attractions will continue to open the doors for more sponsorships and partnerships. The recommendation for 2027 is to focus specifically on outdoor fitness and recreation brand partnerships. Building good partnership relationships in the fitness, sports and outdoor recreation industry will help bring more attention to Clay County and continue to make it an attractive vacation destination for the core visitor audience.

Deliver a Destination Brand Experience

With the predicted uptick in tourism and attention, Clay County must focus on delivering the best possible destination brand experience. Word of mouth about a relatively unknown but growing vacation destination will be valuable to increasing overnight guests. Clay County will work closely with vendors, restaurants and hotels to ensure they are creating the most consistent experience for all guests who visit Clay County. These partnerships will help to increase positive online reviews, positive social media mentions and past guests recommending Clay County to their friends and families. It will also be valuable to invest in a review tracking software to monitor these metrics efficiently at scale for all tourism businesses in the county.



6F. TOURISM PROMOTION: 2027 Action Items

Refresh 2026 Brand Campaigns Based on Performance

2027 will also bring with it time to refresh the campaigns that were launched in 2026. It is important to evaluate not only the effectiveness of both the brand message and the creative but also the promotions and packages that potential visitors are prompted with during the campaign. The saturation of the creative assets should also be monitored to determine when even the most successful creative needs a refresh to re-engage the target audiences.

Invest in Videography and Photography of New Things to Do

The new things to do will be huge draws to Clay County. It is important to capitalize on this potential by investing in both trendy and high-quality professional videography and photography to best showcase these activities. Clay County can have fantastic attractions and be the greatest vacation destination, but if the photography is poor, none of that will be communicated to potential visitors. It is also important that this videography and photography is shot in a way that can be used for the next three to five years.

Research New Advertising Placements and Digital Opportunities

The digital advertising landscape changes rapidly. Make sure you are keeping up to date and planning around these changes. By 2027, we anticipate new marketing opportunities and advertising placements that would be relevant for your next five-year plan. Ensure you are allocating 10%–20% of your tourism advertising budget to testing new placements. Compare these new placements to your existing benchmarks and determine if they are worth continuing.



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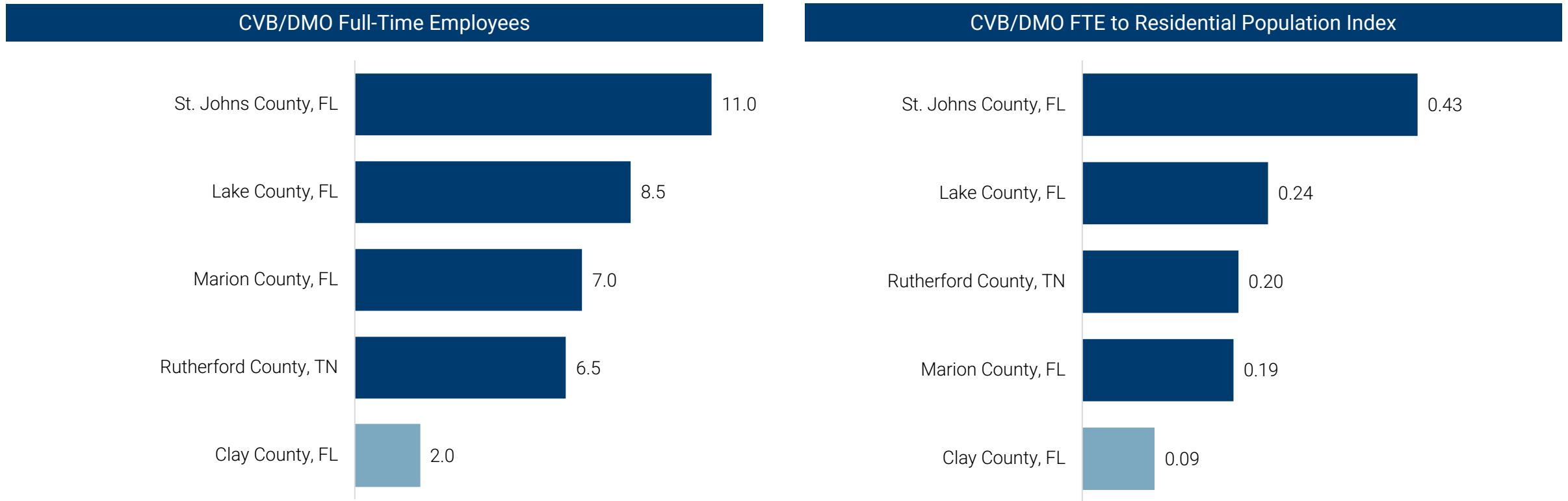
Clay County has a vast array of opportunities to build a unique brand and bright future for residents and visitors alike. The five-year plan includes an achievable mix of short-term sprints and long-term goals that can be applied to a variety of new tourism products and events. Executing the strategy will take the county and tourism brand to the next level and set a strong precedent for continued growth in decades to come.



6F. TOURISM PROMOTION: CVB/DMO Staff Comparisons

In order to best implement the five-year tourism promotion strategy described above, it will be critical for Clay County Tourism to be properly staffed. The two-person office today has done remarkably at elevating tourism in the region, and as of September 2022 two additional full-time employees are supposed to be added in the near-term. In reviewing Clay County Tourism’s staffing levels with those of other compared DMO’s, Clay is currently understaffed and adding two new positions still ranks them at the bottom of the comparison set. Within the next two to three years, opportunities to add additional personnel beyond the four full-time that will be staffed should be evaluated.

With added staff, it will also be important to consider new offices for Clay County Tourism. This new location could also serve as a brick-and-mortar visitor center where visitors can find informational resources, purchase souvenirs and schedule tours.



Note: The chart on the right was attained by dividing the number of full-time employees by the residential population then multiplying that by 10,000.
 Source: County CVBs and DMOs



6F. TOURISM PROMOTION: Recommendations

2023

2024

2025

2026

2027

Optimize Existing Digital Marketing Efforts

- Reduce audience size and locations for digital ad campaigns with same budget.
- Transition media plan to include more Google search and paid social media/less display.
- Create a more robust lead generation funnel for website visitors.
- Create new direct response lead generation advertising campaigns.
- Grow the opt-in email and phone database by 3,000 contacts/month.
- Invest in search engine optimization (SEO) metadata optimization for all existing website pages.
- Revise Google paid search keyword, targeting more overnight visitors.
- Transition to Google Analytics 4 (GA4) or similar analytics software.
- Create TikTok, Pinterest and Instagram profiles to accompany Facebook.
- Create editorial calendar for TikTok, Instagram, Pinterest and Facebook content.
- Identify location for new visitor center.

Build Toward a New Identity

- Convert day trippers to overnight guests.
- New RFP for rebranding and present concept for approval.
- Become an authority on northeast Florida travel content.
- Build more links to Exploreclay.com through new travel content and event partners.
- Create dedicated landing pages and lead generation funnels for different audiences.
- New paid advertising campaign using rebranded concepts in action.
- Consider long-term approach to tourism marketing organizational structure.

Embrace the New Identity

- Adopt new common visual brand identity architecture.
- Create and distribute new brand book.
- Change all digital and hard logo placements to the new brand identity, including printed materials, facility signage, trade show materials and all digital placements.
- Secure appropriate trademarks.
- Create a list of purposeful, brand-specific partnerships for outreach and development.
- Develop paid advertising platform for local businesses to increase visibility on Exploreclay.com.



Expand Reach

- Expand paid advertising reach 3X.
- Allocate larger share of total TDC budget to paid advertising.
- Develop dedicated paid digital ad campaigns for new markets.
- Maintain a database of 100K+ email and phone contacts from key markets.
- Increase grants, sponsorships and partnerships that directly align with new identity.
- Consider billboards and OOH placements on key interstates and thoroughfares.

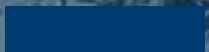


Generate New Demand

- Increase market share of overnight visitors in north Florida.
- Align Clay County with notable outdoor fitness and recreation brands.
- Deliver a destination brand experience.
- Refresh 2026 brand campaigns based on performance.
- Invest in videography and photography of new things to do.
- Research new advertising placements and digital opportunities.
- Continue to add staff as appropriate.



6G | Branding



6G. BRANDING: Past, Present, Future

County Department Adaptations

The Clay County Tourism Brand: Past, Present, Future

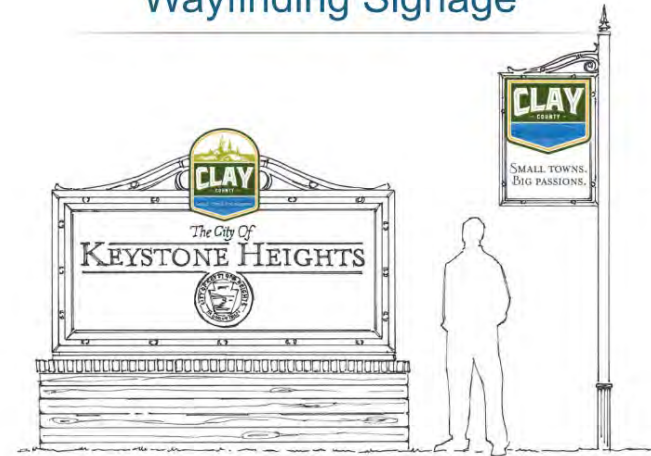
The Clay County TDC has come a long way in a relatively short time. Starting in 2015, the Clay County Board of County Commissioners created the Council and appointed a director dedicated to moving county tourism planning and initiatives forward. The TDC and director contracted a respected branding firm in 2017 to create the first Clay County logo, tagline and branding guidelines. That brand has been effectively used throughout many marketing channels for over five years.

Present Brand

As part of the 2022 study, we were asked by the Director of Tourism to evaluate the overall brand and make recommendations regarding its effectiveness for the future of Clay County. Would the 2017 brand continue to be a fit for the county's growth, or would it need to evolve? While there are no rules regarding the lifespan of a brand, it is not uncommon to find that a professionally researched and designed brand lasts 10 years or more. However, when we look at companies, organizations, and even counties that undergo a significant change, brand lifespan dramatically decreases.



Wayfinding Signage



6G. BRANDING: Past, Present, Future

Stakeholder Survey

As part of our brand evaluation, we conducted in-person interviews of 18 Clay County stakeholders, including county commissioners, city commissioners and mayors, TDC members and staff, as well as local business owners, to gauge their brand sentiment. During these informal interviews, we presented an enlargement of the Clay County logo and asked each stakeholder to rate from Poor to Excellent each of seven questions regarding the current logo. To encourage candor, we guaranteed each person that their answers would be anonymous and be part of a total average. The survey questions were concentrated on the stakeholders' opinion of how the logo would "reflect your vision for the future direction of Clay County."

Clay County Logo Stakeholder Survey Results

POOR	BELOW AVG	AVERAGE	GOOD	EXCELLENT
Question				Average Rating
1. How would you rate the overall quality of the logo?				Average
2. How would you rate the logo's color palate?				Good
3. How well does the overall logo reflect your vision for the future direction of Clay County?				Below Average
4. How well does the logo's top 3rd reflect your vision for the future direction of Clay County?				Poor
5. How well does the logo's middle 3rd reflect your vision for the future direction of Clay County?				Good
6. How well does the logo's bottom 3rd reflect your vision for the future direction of Clay County?				Average
7. How well does the tagline reflect your vision for the future direction of Clay County?				Below Average



6G. BRANDING: Analysis

Interpretation

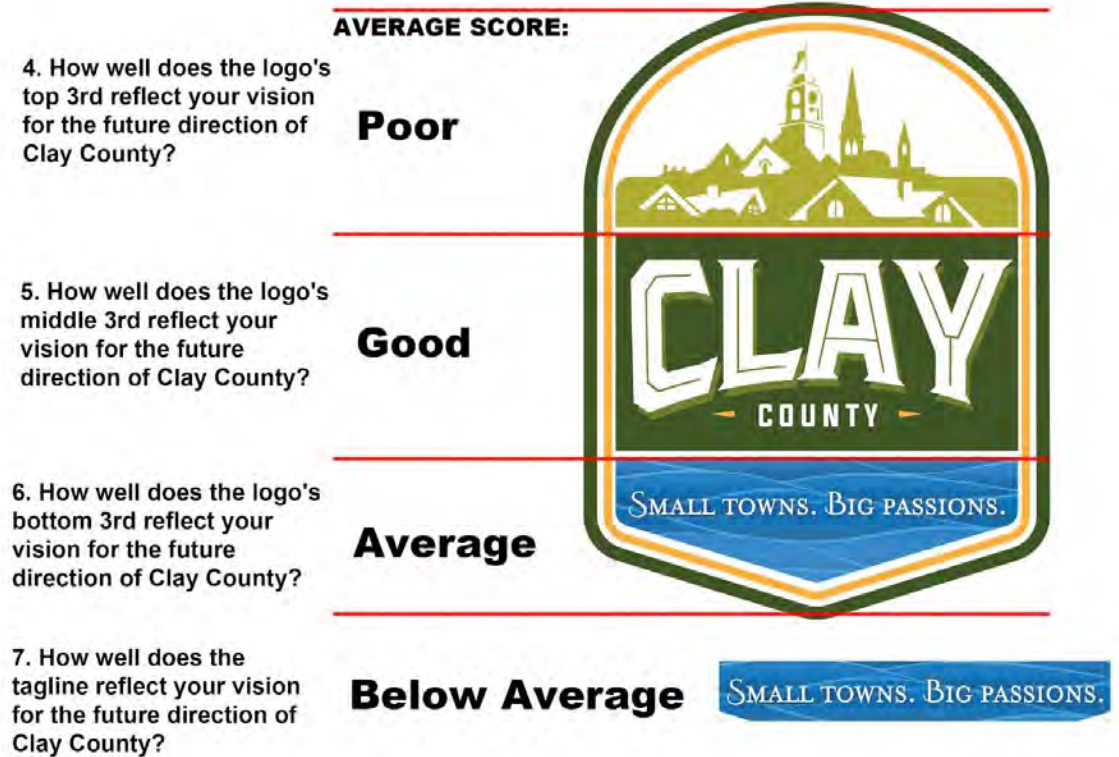
We often use surveys to assist our partners in validating direction. However, when it comes to opinions regarding logos and branding, we find that people judge these more harshly than surveys related to customer satisfaction or the quality of a product or service.

With that in mind, it is not surprising that question (1) regarding the Clay County logo's overall quality rated Average. What should be considered significant is that when we asked in question (3) about the logo's overall effectiveness in the future, the rating dropped to Below Average. In addition, the logo rated well Below Average in five of the seven questions, with only two questions averaging Good and none rating Excellent.

While the respondents rated the middle section of the logo higher with a Good, liking the readability and sporting nature of the font, they had negative feelings regarding the building skyline illustration at the top of the logo, giving question (4) the lowest average rating of any question with a Poor. Many did not recognize the buildings and felt that it was busy and not exciting/interesting enough for tourists. Question (7), asking about the tagline, received the second lowest rating with a Below Average. Most stakeholders commented on confusion regarding the tagline's meaning. Many did not feel it accurately represented the essence of Clay County. Still, others felt it sounded more like it was directed to locals rather than tourists.

Conclusion

It is worth restating that all of the respondents are stakeholders who are vested in the future success of Clay County tourism. It is noteworthy that they rated the logo's performance on all the future-based questions as below average.



6G. BRANDING: Analysis

The Logo

We recommend that the TDC engage a qualified branding firm to refresh the current logo and brand with a look and messaging that is in step with the direction of the County's 2027 plan.

Keep in mind that a tourism logo is not a state seal. It needs to be simple, fun and easy to read. The current logo is professionally designed and has a color scheme that compliments the county's abundant trees, natural settings and water. However, while the top illustration is well executed, it is complex and perhaps looks more like a county/city logo rather than a logo whose intent is to attract tourists to sports and outdoor activities. Here is an example of a rebrand BlackDog did for [Suwannee County](#) that illustrates the methodology behind building a destination brand.

The Tagline

The tagline is short and well-stated. However, we agree with the stakeholders that it is vague and feels directed toward County residents or economic development over tourists. We recommend developing a new tagline that is in step with the future of tourism in the county, one that answers the question "Why do I want to use my valuable vacation/free time in Clay County?"



Suwannee Rebranding



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6G. BRANDING: Analysis

The Tone of Voice and Messaging

We believe there are a few too many messaging directions being utilized in the current marketing. While a single tagline supported by various campaign headlines is totally acceptable, it is critical that all the messaging refer back to the single thread that is unique to Clay County. It is also essential to control “message creep.” There is a natural tendency for individuals working with a brand to get bored with the messaging and add variations that move away from the original brand promise. Consistency is the key to success in communicating your brand to potential tourists.

In an audit of Discover Clay ad messaging, we found the following being used:

Small Towns. Big Passions.
Explore Your Passion
Discover what moves you
What is it that moves you?
Explore Somewhere Real
Unexpected Florida

We recommend reviewing and refining your brand messaging to communicate the county’s future direction. [“A destination brand is essentially the promise of an experience, one that the traveler desires and that the destination can deliver.”](#) It is the culmination of all communications, including the brand, that uniquely positions the destination to reach the target audience.

When searching for your unique brand promise, keep in mind that there are several neighboring Florida counties promoting nature and the outdoors. Therefore, we must ensure that our direction and messaging are unique and exciting enough to separate Clay County from the pack.



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6G. BRANDING: Direct Competitors

"It's Our Nature" - <https://visitpalatka.com/>

Visit Palatka primarily leverages the St. John's River and water sports to draw outdoor enthusiasts and families to visit. Position Statement: Palatka may be called the Gem of the St. John's, but the St. John's is also the Gem of Palatka. Our vast waterways are ready for exploration for bass fishermen, kayaking or leisurely boating. More than 22 trails connect the community for bikers and walkers alike.

"Where Nature & Culture Meet" <https://www.visitgainesville.com/>

Visit Gainesville primarily leverages trails, biking, hiking and freshwater springs to draw outdoor enthusiasts and families to visit. Position Statement: Explore eight state parks with more than 100 miles of trails for biking, birding and hiking, or cool off in crystal-blue freshwater springs.

"Discover the Nature of Things" <https://visitsuwanee.com/>

Visit Suwannee County primarily leverages the Suwannee River, springs, camping and caves to draw outdoor enthusiasts and families to visit. Position Statement: It's impossible to talk about Suwannee County without singing the praises of the historic Suwannee River. Inspiration for the state song of Florida, this meandering tea-colored river winds through our scenic state parks, natural springs, charming small towns and Civil War battlefields. A leisurely canoe ride down any stretch of this picturesque river leads you to an encounter with something you may have never seen before. Countless species of fish, birds and other wildlife call our county home, and we do our best to live alongside them. From exciting dives in underwater caves to tubing with the gentle river currents, from thrilling rounds of golf to relaxed hikes through stunning Florida forests, discover the nature of things here in Suwannee County.

"Florida's Natural Wonder" <https://www.ocalamarion.com/>

Ocala Marion CVB primarily leverages equestrian events, kayaking and natural wonders to draw outdoor enthusiasts and families to visit. Position Statement: From natural wonders and outdoor adventure to world-class sporting facilities and culture, every mile of this destination surprises, delights and welcomes you. Internationally renowned among equestrians, cyclists, geologists, and even the world of classic cinematography, Ocala/Marion County still feels like a hidden gem to those who aren't already insiders. And yet, when you're here, you're never an outsider.



6G. BRANDING: Next Steps

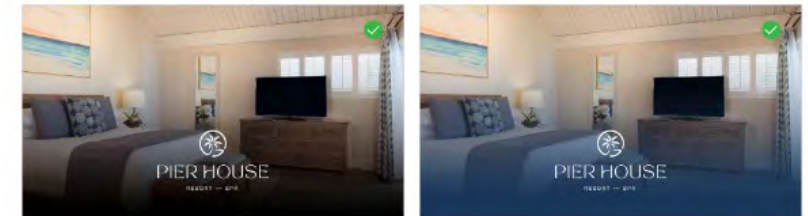
Brand Guidelines

As part of the brand refresh, include detailed tone of voice and messaging guidance. This will be shared with all content creators and marketing partners so that the tone and messaging are consistent across all channels and help mitigate message creep. We recommend developing a detailed brand guideline that includes the logo, color themes and tone of voice and is easily shareable with all team members. An example can be found in our recent work for [Pier House Resort](#).

Next Steps

Updating a logo and brand can be time-consuming and expensive. The good news is that we don't believe the current logo is in immediate need of replacement or overhaul. We recommend transitioning right away to the version of the logo without the skyline illustration. A re-evaluation can take place over the next 24 months, with an emphasis on a refresh rather than a total redesign of the logo.

We recommend starting with the messaging first, as that can happen more quickly and affordably. Update the tagline and brand promise within the next 12 months. Work with your marketing firm partner to develop a detailed marketing plan that focuses on consistent messaging throughout all channels. The plan should outline two years forward and detail the upcoming 12 months.



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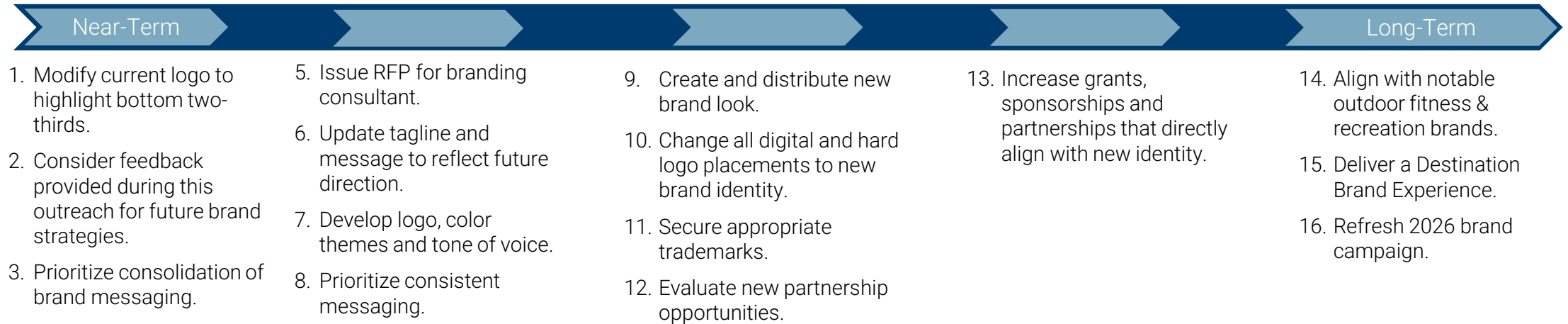
Non-Local Perspective

Recommendations

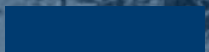
6G. BRANDING: Recommendations



We have summarized the primary initiatives and milestones for the County, placing them generally in a time sequence from near-term to long-term.



7 | Where We're Going



7. WHERE WE'RE GOING: Overview

As with any planning effort, it is critical to establish time-based, actionable goals to help create stakeholder buy-in and project accountability. Throughout this Plan, general timelines have been provided for each of the seven recommendation themes, and various partners and costs have been listed to help provide order-of-magnitude direction as to the how, why, when various initiatives should be implemented.

This “Where We’re Going” section offers two future visions for Clay County: a near- to mid-term five-year timeline and a more long-term ten-year timeline. The envisioned goals outline below can be achieved through implementation of initiatives described throughout this Plan, and as previously noted, will require the collaboration of a dozens of stakeholder entities throughout the community.

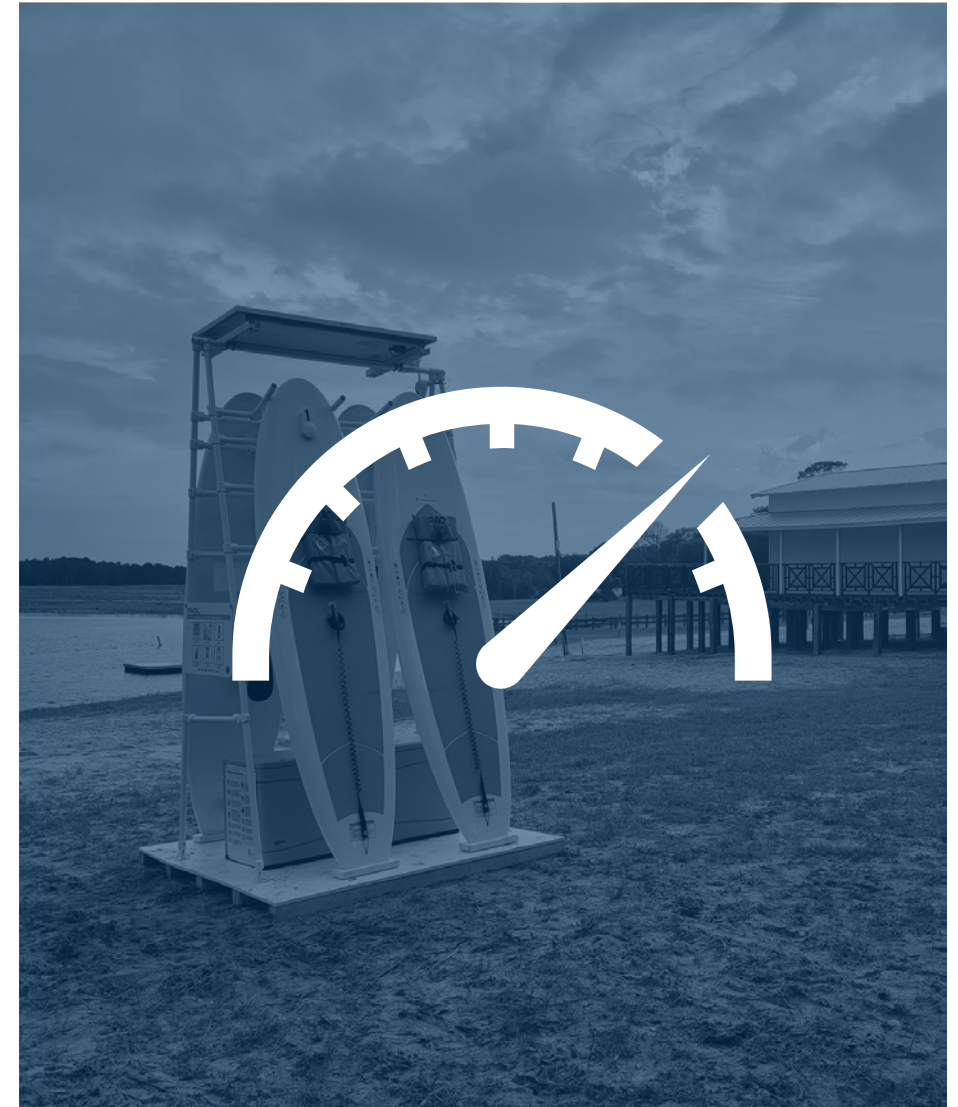
This concluding Chapter provides tangible goals and outcomes that help to define what successful implementing will look like for Clay County’s tourism growth over the next five- and ten-year timelines.

Defining Success – 2027 Key Milestones

With a successful five-year implementation effort, Clay County will have undergone significant advancements in its tourism promotion and branding, and various destination enhancements associated with amateur sports, outdoor adventure, arts and culture, and commercial development will be completed. A breakdown of the benchmarks associated with each of these key areas is provided below.

Amateur Sports

- Regional Park developed and expanded to accommodate 10+ rectangle fields that are each tournament-quality.
- Clay County Tourism’s new sports sales role focuses on attraction and retention of amateur sports tournaments and other niche outdoor sports events.
- Existing facilities such as Little Rain Lake Park and Omega Community Park are hosting a combined 10+ tournaments per year after improvements to the facilities.



7. WHERE WE'RE GOING: 5-Year Milestones

- Regional Park receives significant recognition from Visit Jacksonville and is prominently featured as a regional sports facility on their website and sports tourism promotions.
- Regional Park hosts 25 or more tournaments per year, averaging 60 teams each (approximately 1,000 attendees per event).
- 15,000 or more hotel room nights generated by the amateur sports segment, helping to support between two and four percentage point increases in annual hotel occupancy and driving a \$5 increase in annual ADR.
- Regional Park activity generates demand for one to two new hotel properties within a ten-minute drive.
- Improved sports facilities and expanded Regional Park provide important opportunities for youth and adult rec league practices and games.

Outdoor Adventure

- Strategic land acquisitions completed by Clay County Parks & Rec to provide greater access to Black Creek, Doctors Lake and/or various other bodies of water, and five or more kayak put-ins and/or boat ramps are provided in the destination.
- More active kayak, canoe and paddleboard communities in Clay County develop one or more large water-based community events, as well as one or more weekly/monthly recurring events on Black Creek and/or Doctors Lake.
- Five or more climate-controlled treehouse cabins are added to Camp Chowenwaw.
- Significant portions of North Florida Greenway and other more urban trails are completed that drive greater biking and hiking among local residents, driving increases to average length of stay for outdoor-oriented visitors by a quarter- to a half-day.
- Investments in parks following the Parks & Rec Masterplan drive 10 to 20 percent greater visitation of parks by local resident base, leading to important health and wellness and other quality of life benefits.
- North Florida Greenway and enhanced trails drives incremental visitation to County by 20,000 to 30,000 new visitors per year, primarily from the drivable region.
- Site identified for new outdoor adventure park, with construction taking place soon after.

7. WHERE WE'RE GOING: 5-Year Milestones

- Highly participatory and collaborative vacation rental property base that has grown by 15 percent since 2022 and regularly shares information with Clay County tourism and its stakeholders.
- Outdoor adventure product enhancements to increase day trips to County by 15 to 20 percent, and result in 3 to 5 percent increase in hotel occupancy (creating demand for new supply).

Arts and Culture

- More active programming of Clay County Fairgrounds generates 5 to 10 percent greater utilization of the complex per year. One to two new events are added to the campus that attract 10,000 or more attendees.
- Group bookings at Club Continental increase by 20 percent, leading to material room night generation.
- One to two existing festivals in Clay County are lengthened by one day, and experience at least 25 percent increase in overall attendance.
- Food Truck Friday is grown into even larger community celebration as Walnut Street is improved, creating a true town center gathering for Clay County's growing population.
- New Clay County Southern Rock Festival (or other theme) established and attracts 10,000 or more attendees.
- Southern Rock trail created, providing important destination marketing benefits and attraction of 5,000 or more net new visitors per year while also extending average stays and instilling community pride.
- Newly established Clay County Arts Council completes Public Art Master Plan and supports important arts projects throughout the community.
- 20+ murals, sculptures and other installations are added to highly trafficked areas throughout the County, improving aesthetic of areas for both visitors and residents.
- Historic and cultural attractions in the area receive 10 to 20 percent increases in both digital and in-person visitation, with a majority of this engagement driven by Clay County's resident base who now take greater pride in the area's heritage.
- Moderate impact of arts and culture investments should result in 1 to 2 percent jump in hotel rooms nights and up to 5 percent increase in day trips.

7. WHERE WE'RE GOING: 5-Year Milestones

Guiding Commercial Development

- Character protection committee and communications with developers leads to development of three new waterfront restaurants, five or more restaurants that garner 100 or more reviews on Yelp! within the five-year time frame.
- One to two location-based entertainment experiences developed in the area, such as Chicken n' Pickle, Cinergy, or similar concepts.
- Three new hotels are developed in County, preferably lifestyle brands that are at least "select service plus"
- Site established for landmark resort attraction.
- Improved restaurants, entertainment and retail lead to longer stays, resulting in 3 to 5 percentage point increase in hotel occupancy (including added supply) and \$10 to \$15 increase in ADR.
- Drive times from Jacksonville to select areas such as Middleburg and Green Cove Springs shorted by up to 50 percent with completion of portions of First Coast Expressway, thereby driving greater traffic with higher efficiency to places of interest.
- Clay County reduces restaurant, retail and entertainment leakage by 10 to 20 percent (as measured by GIS platforms) with added businesses that cater to its growing resident base.

Long-Term Visioning

- A coordination team is established for Reynolds Park, including local, state and federal agencies, as well as private sector representatives. The team helps to develop a broad timeline for future development on the site.
- Master plan established for Reynolds Park site.

Tourism Promotion

- Clay County Tourism office grown to at least six staff members.
- Brick-and-mortar visitor center developed in high foot traffic area that houses Clay County Tourism offices and provides direct engagement with visitors and residents.

7. WHERE WE'RE GOING: 5-Year Milestones

- Paid advertising reach increased by 3x.
- Cumulative social media engagement (follower base) of 20,000 or more across all channels (Facebook, Twitter, Tik Tok, Instagram, YouTube).
- Database of 100,000 or more email and phone contacts established.
- Annual hotel room night generation increased by 3 to 5 percentage points due to marketing.

Branding

- Modified Clay County Tourism brand to be re-evaluated and refreshed by 2027.
- Resident and visitor base consulted to assist with redesign via focus groups, interviews and digital surveys.

Overall 5-Year Outcomes

- Hotel supply increased 25 percent (approximately 350 hotel rooms).
- Hotel room nights increased by 20 percent.
- Market leakage for retail, entertainment and dining reduced by 15 percent.
- Resident scoring of Clay County fulfilling its tourism potential jumps from an average of 2.9 to 4.0 on a scale of 1 to 7 via digital surveys.
- Destination developments support growth of business and employee base by ten percent (from approximately 6,300 businesses and 57,400 employees to nearly 7,000 businesses and 65,000 employees, respectively).

7. WHERE WE'RE GOING: 10-Year Milestones

Defining Success – 2032 Key Milestones

Over the next ten years, Clay County will be transformed from a developing rural and suburban community to an emerging sports, outdoor and family destination that concurrently offers some of the best living conditions in the state of Florida. Given the extended timeline, specifying quantitative milestones proves to be difficult, but many major visions for attraction development should be completed by this time. These more high-level goals are listed below, followed by a summary of the significant positive impacts that should be experienced by the destination by 2032.

Amateur Sports

- New indoor sports facility developed, generating an additional 20,000 or more room nights per year.
- Clay County established as the youth sports capital of North Florida.

Outdoor Adventure

- New outdoor adventure park and campground destination developed, attracting 50,000 or more attendees per year and generating 10,000 or more overnight stays per year.
- Continued trail developments leading to continued increases in visitation, length of stays and ridership among the local community.

Arts and Culture

- New Southern Rock Hall of Fame and Amphitheater developed, attracting 30,000 more attendees per year, driving length of stays among visitors and incentivizing net new spending among local community members.

7. WHERE WE'RE GOING: 10-Year Milestones

Guiding Commercial Development

- New resort attraction (waterpark/resort or similar family-oriented project) developed, offering 350 or more rooms, and generating up to 90,000 room nights per year.
- Waterpark and other entertainment amenities at resort utilized by 50,000 or more local community members annually.

Long-Term Visioning

- Waterfront destination at Reynolds Park developed, leading to significant visitation and net new spending increases among visitors.
- Locations such as Keystone Heights, Middleburg, Penney Farms, and Clay Hill grow in residential base, but remain largely removed from high traffic visitor areas.

Tourism Promotion and Branding

- Clay County Tourism office continues to modestly grow in staff to support the marketing of a more active, higher hotel revenue-producing destination.

Overall 10-Year Outcomes

- Hotel supply increased seventy-five percent (approximately 1,050 hotel rooms).
- Hotel room occupancy remains at or near historic levels even with supply growth.
- Market leakage for retail, entertainment and dining reduced by 75 percent.
- Resident scoring of Clay County fulfilling its tourism potential jumps from an average of 2.9 to 5.5 on a 1 to 7 scale via digital surveys.
- Destination development supports growth of business and employee base by ten percent.