

# St. Johns County Destination Master Plan

March 15, 2010



Prepared by: PGAV**DESTINATIONS**









## TABLE OF CONTENTS

Purpose and Methodology .....	5
Executive Summary .....	7
Situation Assessment .....	11
• Strengths and Weaknesses	
• Regional Overview	
Brand Strategy .....	33
Strategic Opportunities .....	45
• Outdoor Recreation	
• Family	
• Arts and Culture	
• History	
• Romance	
• Golf	
Infrastructure Strategy .....	71
Marketing and Promotional Strategies.....	79
Prioritized Implementation Plan.....	91



The Tourist Development Council of St. Johns County has retained PGAV Destinations to develop a Destination Master Plan. PGAV has executed this project with the assistance of Magellan Strategy Group, led by Chris Cavanaugh.

The purpose of this plan is to provide an actionable plan that guides the development of the tourism industry in St. Johns County for the next several years. The plan address key issues, such as the role of the upcoming 400<sup>th</sup> and 450<sup>th</sup> Anniversaries, the potential of the County's emerging arts and culture activities to serve as a catalyst for tourism, and the potential increase of the County's exceptional golf assets as drivers of tourism. The plan also sought to identify other underutilized attributes such as the County's African-American and Hispanic tourism assets.

### **General Process**

The process was organized into three phases as follows:

#### **Phase One – Information Gathering and Initial Assessment**

During Phase One, the PGAV team initiated the process by undertaking a review of St. Johns County's existing assets, reviewed existing information regarding the tourism market, interviewed key players, engaged stakeholders in an initial visioning session, conduct baseline research, and performed a Destination Assessment.

#### **Phase Two – Strategy and Product Development**

Phase Two encompassed the full spectrum of strategic thinking and creative development. Throughout this effort, the team built from the foundation of Phase One, and translated our initial assessment into actionable ideas that will shape the Destination Plan for St. Johns County. Very importantly, PGAV's concepts and strategies were validated in a primary research process, involving focus groups with consumers and meeting planners.

#### **Phase Three – Final Analysis and Recommendations**

Phase Three built on the findings of Phases One and Two, and includes an implementation plan for all elements of the plan.



# Purpose & Methodology

## **Marketing Research Summary**

To execute its marketing research plan of work, PGAV partnered with The Marketing Workshop of Norcross, GA, to design and implement several pieces of field research among travelers and meeting planners. This plan of work included the following components:

- One focus group in the Atlanta market in January 2009 among leisure travelers who have recently visited Florida
- An online quantitative study in February 2009 among a random sample of 400 leisure travelers residing within driving distance of St. Augustine, Ponte Vedra and the Beaches
- An online quantitative study in February 2009 among a sample of 264 recent inquirers to the St. Augustine, Ponte Vedra and the Beaches VCB
- An online quantitative study in February 2009 among a sample of 804 recent destination sweepstakes contestants collected by the VCB
- Two focus groups in the Atlanta market in December 2009 among leisure travelers
- An online quantitative study in December 2009 among a random sample of 953 leisure travelers residing within driving distance of St. Augustine, Ponte Vedra and the Beaches, and in the New York City metropolitan area
- An online quantitative study in February 2010 among a sample of 50 meeting planners who book meeting and conference business into the southeastern United States

A total of 2,501 leisure travelers and meeting planners were surveyed or participated in focus groups during this marketing research plan execution. PGAV believes this is an extremely reliable foundation for its strategic recommendations. The results of this research as published by The Marketing Workshop were included in a separate appendix provided to the TDC.

## **Stakeholder Interviews**

The team undertook several phases of stakeholder interviews, involving more than 140 county residents representing a wide variety of interests from arts and culture, to African American heritage, to nature and outdoor activities. Interviews also occurred with key representatives of County government, including all Commissioners. More than sixty hours of interviews were undertaken.

## **Benchmarking**

PGAV's team reviewed and interviewed representatives of ten key destinations that were identified as engaging in potentially strong examples of policy, approach, and use of heritage, arts and culture as tourism assets. These destinations were Palm Beach County, Florida; San Diego, California; Savannah, Georgia; Charleston, South Carolina; Banff, Alberta, Canada; Key West, Florida; Sedona, Arizona; Santa Fe, New Mexico; Austin, Texas; and Asheville, North Carolina.



# Executive Summary

St. Johns County is an exceptionally diverse destination, across many different dimensions of the visitor experience. It is this diversity which represents one of the county's greatest strengths, and attracts a broad range of travelers throughout the year. It is also a significant challenge for local travel and tourism industry stakeholders because it presents so many questions as to how to invest scarce resources. These resources are under great pressure given the demands of so many interests in the county, the competitive threat posed by other destinations, and tourism's role as one of the primary economic engines in the area. Prioritizing the allocation of the county's tourism resources is one of the objectives of this study.

PGAV has identified several areas of exceptional potential for St. Johns County as a destination. Some parts of the county's tourism industry are nearly achieving what we consider their full potential as destination drivers. The county's golf assets, for example, are recognized internationally by enthusiasts as being truly world-class. Yet even those assets are somewhat underappreciated by many of the travel decision-makers in the target audiences for St. Augustine, Ponte Vedra and the Beaches. Other parts of the tourism experience show great promise, but are still very much latent for the typical visitor and not easy for that visitor to engage with or understand the benefit they provide. Our vision throughout this project has been to help St. Johns County recognize the potential for the county's primary tourism assets and identify ways of leveraging them with greater impact in the marketplace.

The situation assessment performed for this study notes that the county, like all destinations, possesses strengths and weaknesses relative to its position in the market. St. Augustine, Ponte Vedra and the Beaches have an amazing number of stories to be told, and it is this rich content that provides the basis for many of our strategic recommendations. The county has an exceptionally strategic location alongside beautiful beaches, scenic natural landscapes, and a busy interstate highway that connects large markets to the region. And of course, St. Augustine has an enviable, unduplicated position in the marketplace as America's oldest city.

But St. Johns County also faces some challenges that it must overcome to reach its destination potential. The visitor experience of navigating the county and understanding how to engage with its many stories, activities, and attractions must be improved. For such a historic treasure, St. Augustine is sometimes unable to provide a cohesive visit experience for its guests that fully immerses them in nearly 500 years of history. And there is a noticeable lack of cooperation and discussion among many of the key industry participants in the area, meaning the county sometimes misses the chance to be more guest-centric in its tourism delivery.

Addressing many of these weaknesses and leveraging the destination's strengths begins with the St. Augustine, Ponte Vedra and the Beaches brand. PGAV recommends a brand strategy that focuses upon six core competencies of the county—history, arts and culture, golf, family travel, romance, and outdoor recreation. These six areas represent the areas of greatest expertise as well as tourism potential within the county. St. Augustine is a widely known brand name and St. Johns County is best known for its history and its beaches, yet there are still many potential visitors in the target audience who cannot identify anything associated with the destination. Focusing the brand and the county's resources upon the promotion and further development of those six core competencies will create a more relevant, highly emotionally-connected visitor experience.



Many of PGAV's recommendations for master plan strategic opportunities follow these six core competencies, and build upon them by suggesting investment and/or improvement in key areas associated with each. While there are many different strategies and tactics presented for consideration, we have paid particular attention to those that drive substantial incremental visitation and have a high probability of return on investment. These recommendations include significant bricks-and-mortar capital projects, such as a major new history attraction for St. Augustine and the enhancement of Fort Mose; programming execution, such as the addition of new nature-based experiences; marketing and promotion strategies, including the investment in and improvement of the county's

destination web presence and the addition of sales staff at the destination marketing organization level; event suggestions, such as a signature event celebrating the area's rich culinary heritage; and destination infrastructure enhancement opportunities.

While investment in destination infrastructure is often expensive and time-consuming, PGAV has recommended a number of initiatives to improve the county's market competitiveness. Wayfinding signage is a significant area of infrastructure enhancement, but it is also an important countywide marketing tool. Visitor orientation is an important aspect of wayfinding, but it is not necessarily limited to physical signage. Parking is an issue of major importance to the industry, residents, and visitors alike, and has a profound impact upon the county's quality of life and the visitor experience. And commercial air service is an oft-cited opportunity for the destination, but one that should be accompanied by appropriate levels of expectation for its impact.

PGAV has tested several different destination product concepts among both leisure travelers and meeting planners, to gauge their current perceptions of St. Augustine, Ponte Vedra and the Beaches and to identify major opportunities for product enhancement. The most popularly appealing concept (among all audiences—leisure travelers with and without children, and meeting planners) was one that focused upon several festival and special event elements, and was cited for its appeal as an activity unique to St. Johns County and tied to its history, culture, nightlife, and brand image. Other concepts evaluated included culinary-focused experiences; new history attractions; family-friendly children's activities and attractions; arts and culture-related activities and events; nature-themed destination products; and a regional destination center that is intended to pull travelers off Interstate 95 and help them learn about the area in greater detail than a typical visitors center.



# Executive Summary

There are a number of other marketing and promotional recommendations that are provided to address opportunities not necessarily covered by the six core competencies or which supersede them. Among these are several marketing-related recommendations for helping St. Johns County's visitors better engage with the destination and overcome many of the barriers they may face to increasing their length of stay, guest spending, and overall satisfaction. The expansion of the county's destination marketing to include targeted efforts for new audiences, such as culinary enthusiasts, religious-affiliated groups, destination weddings, and African-American and Hispanic travelers, is another important marketing initiative to increase visitor volume.

PGAV has provided a list of implementation recommendations for the master plan, prioritized by 13 different criteria and overall expected return on investment. These criteria include cost and speed-to-market factors; ability to drive incremental visitation; ability to influence visitor experience and resident quality of life; and the ability to reduce barriers to visitor satisfaction and impact all parts of the county. This implementation priority is subjective, but reflects PGAV's best thinking as to the greatest positive impact upon the county's tourism efforts and its ability to remain competitive in the marketplace.







## **The Changing Face of Travel and Tourism: Why Does a Master Plan Matter?**

Some local tourism stakeholders, residents, and government officials might question the wisdom of producing a master plan as a way of stimulating growth in the local tourism economy. After all, St. Johns County is the nation's oldest destination—travelers have been coming to northern Florida for almost 500 years. The destination already spends money to promote itself and to enhance certain aspects of the visit experience. And as this report frequently notes, the county is blessed with an abundance of destination assets that would be the envy of many other communities.

But maintaining the status quo is no longer sufficient in an industry that has seen many changes over the last decade. The pace of market transformation in travel and tourism has been greater than at any time since World War II—or perhaps ever. Numerous external events, many of which would have been unimaginable prior to the decade, have helped reshape the category:

- The influence of the Internet and its transformational role in travel decisions and purchases
- The consolidation of the airline industry and the increasing influence of the low cost carrier
- The terrorist attacks of September 11 and the impact of subsequent security measures
- The instability of oil prices and their impact upon the driving habits of American travelers
- The greatest economic downturn since the 1930s and the crash of the real estate industry
- The green movement and its effect upon consumer behavior and destination development
- The impact of severe hurricanes upon the Gulf and Atlantic coasts

The resulting impact of these forces can now be seen in three trends which have surfaced in recent years within the travel and tourism industry.

## **The New Role of the Destination Marketing Organization**

Destination marketing organizations (DMOs) have traditionally served one primary role during their history: sales and marketing of the destination, usually in order to help area hoteliers fill beds. This sales and marketing function usually extended to the operation of visitor centers in the community, but that was as close to bricks-and-mortar product development as most DMO directors ever got. The idea of product development or destination “management” (working with various local stakeholders to enhance the appeal of the destination and its ability to generate revenue for the community) was a mostly foreign notion. Few DMO leaders worked very closely with government officials at any level—local, state, or federal.

That's all changing in the 21st century. An effective DMO now takes an active role in the management of the destination, rather than passively waiting for someone else—private or public—to step forward and identify opportunities which enhance the visitor experience and the local tax base. In particular, the new DMO is a catalyst for product development which could include both “soft” products (events, thematic trails, etc.) and bricks-and-mortar projects.

This active participation in the enhancement of the destination experience may include recruiting developers and investors; identifying sources of funding; working closely with local, state, and federal government leaders; and bringing area stakeholders together for the mutual benefit of the community and themselves.

A 2008 survey of 244 DMO executives by Destination Marketing Association International (DMAI) showed that 40% of DMOs are engaged in “active” product development, while another 10% are taking a “major” role in destination management by helping finance or overseeing development of significant visit experience products. This is in addition to the traditional responsibility assigned to the DMO of destination sales and marketing. Such levels of engagement by the DMO would have been rare a generation ago. Much of this trend reflects the increasing recognition of travel and tourism as a significant form of economic development, and the support it provides to small businesses.

The separation of the duties of the executive director of the St. Johns County Tourist Development Council and the St. Augustine, Ponte Vedra and the Beaches Visitor and Convention Bureau (VCB) creates two separate yet powerful forces for destination management in the county. The VCB is now free to concentrate upon the sales and marketing of the destination, while the TDC engages in shaping policy decisions and the allocation of resources where they will have the greatest impact upon destination development.

### **The Increasing Importance of the Destination Brand**

The typical American consumer is bombarded with as many as 3,000 advertising and promotional messages each day. Not all of them are travel and tourism-oriented, of course. In fact, very few destinations have messages that truly stand out amidst the clutter of the marketplace. But there are also many non-destination products and services that are clamoring for the attention of the consumer, and quite a few represent competing uses of time and money. There are an infinite number of new products and services that didn’t exist 30 years, 20 years, even 10 years ago that compete with travel for time and money.

Given this constant barrage of messages and the many other demands upon their time, it’s no wonder the American consumer feels such a strong need to simplify even as life becomes more complicated. That’s why strong brands—in travel and tourism, and any other category—represent such a great benefit to the consumer. They make it easier to decide and ease the risk of making a wrong decision, particularly for something that requires the investment of precious leisure time or meeting planner dollars. The consideration of places to go and things to do is now a year-round activity for most Americans, and getting into that consideration set means being in the mental marketplace 365 days a year.

To differentiate itself from the thousands of other destinations screaming for attention, St. Johns County must understand what every other strong brand already knows: what it is as a destination; what it does well; and why it matters to the potential visitor. The destination must communicate this to its target audiences with laser-like precision and unshakable credibility.

### **The Threat of Emerging Competition and the New Tourism “Arms Race”**

As traditional manufacturing has eroded in the U.S. and as blue collar jobs have been eliminated, more communities have looked to new forms of economic development and in some cases have created incentives which mimic some of those previously used to lure factories. Some of this is also a recognition of the influence of travel and tourism upon the creative economy, and the need to create communities that are great places to both live and visit. There is also, finally, a sense that travel and tourism growth is one of the best ways to stimulate the growth of small businesses in the community.



# Industry Assessment

In the pursuit of tourist dollars, cities have traditionally invested in projects such as convention centers, arenas, and stadiums. The return on investment to the community of these projects has been widely debated. However, both the public and private sectors in many cities are now spending heavily upon new initiatives designed to draw incremental visitor spending and make them more competitive in the marketplace.

Rockingham County, North Carolina—an area hit hard by the decline of the furniture and textile industry, and traditionally a non-factor in tourism—is preparing to invest \$22 million in the Horse Park of the South to attract equestrian enthusiasts. Charleston, South Carolina is seriously considering a 5% car rental tax for the purposes of attracting a low fare carrier, specifically Southwest Airlines. And Panama City, Florida built a new airport to support the massive real estate and hospitality investments of the St. Joe Corporation—which, in turn, committed up to \$26 million to lure Southwest to that same airport. On a lesser scale, numerous cities large and small have invested in significant wayfinding systems to assist the visitor and create in-market promotion. These are just a few examples of what is becoming a new tourism “arms race” as communities race to make themselves more competitive as destinations, create new visitor spending opportunities to drive tax revenue, and establish new bases of economic activity even as the country is still slowly recovering from economic recession.





# Situation Assessment

## Strengths

**The destination possesses an abundance of stories.** Many communities don't have a single compelling story to share with visitors. St. John's County has hundreds of stories. Identifying the most compelling stories and then determining the best way to tell them, using limited resources, is the task faced by those in the local tourism industry. They are rich sources of visitor motivation and experiential content, and go well beyond the dimensions of St. Augustine's Spanish colonial background. Compelling stories need not be rooted in just history or appealing only to history "buffs." They can be found in golf, the scenic and natural assets of the county, or in the agricultural and farming activities of the region. They are the foundation of a strong tourism economy, and a highly marketable destination.

**St. Augustine enjoys an enviable market position as America's oldest city.** No amount of destination marketing magic from other cities can surpass the claim that only St. Augustine can make. It's been said that if you can't be number one or two in your product category, change the category. There is no need for St. Augustine to change categories and be something it's not. This is a clearly defined position and sets the destination apart in the pantheon of historic American destinations. It is a true ownership position in the market (but not necessarily always widely known). Now the question is, can St. Augustine become America's *best* historic city?

**St. Johns County possesses a strategic location on Interstate 95, the primary north-south highway corridor on the Eastern seaboard.** According to the most recent figures available from the Florida Department of Transportation, I-95 carries an average of 66,000 vehicles per day just north of the state highway 16 exit (exit 318) in St. Johns County. While some of this is undoubtedly local traffic, much of it is leisure travel to and from other destinations in the Sunshine State. St. Johns County is one of the first destinations in Florida to have a crack at this traffic flow and convert them into potential future visitors, or into daytrippers off the interstate and into the county.

**The county enjoys proximity to several large markets and popular tourism destinations.** St. Johns County's location in north Florida puts it in close proximity to a number of large and medium-size markets within relatively easy driving distance, including Jacksonville, Gainesville, Orlando, Tampa/St. Petersburg, Tallahassee, Savannah, Charleston, Atlanta, West Palm Beach, Fort Lauderdale, and Miami. It is also located close to several popular tourist destinations, attractions and events, including Orlando, Daytona Beach, Amelia Island, and Kennedy Space Center. In addition, Jacksonville is home to a large corporate presence which generates a large number of meetings and conventions. It also has a large and newly renovated international airport (within 30-60 minutes driving distance of almost every location within St. Johns County) with frequent nonstop service to every major airline hub in the eastern half of the United States.

**There are a vast number of attractions and activities.** The county does not lack for things to do and see. It is home to a significant number of attractions and provides a number of activities (both ongoing and as special events) for its visitors. There are very few of what could be called true "anchor" attractions, but the county does have both quality and quantity.

**The county has many miles of beautiful beaches which are a powerful anchor and motivator to visit.** At the very least, St. Johns County cannot be ruled out as a destination within its competitive set by its target consumers because the county does not have beaches. And the beaches help attract certain target audience segments that would be almost impossible to reach (such as families) without them, or without a major destination anchor such as a theme park. They place the county at parity with many other Florida and southeastern U.S. destinations.

**St. Johns County is home to several truly world-class golf products.** The county is home to some of the best-known golf entities in the world: the World Golf Hall of Fame, THE PLAYERS Championship, TPC Sawgrass and its Stadium Course and famed 17<sup>th</sup> hole, TOUR Academy, and PGA Tour headquarters. These assets, as well as the numerous courses within the county, represent a critical mass that few other destinations can truly match. They contribute mightily to the awareness of the destination among the golf enthusiast audience.

**St. Johns County has a wealth of natural and scenic assets.** SJC possesses a somewhat uncommon blend (at least among Florida destinations) of bustling urban activity and quiet natural solitude, of upscale luxury resorts and rugged outdoor adventure—all within a few miles of each other. The relatively unspoiled natural scenic environment centered upon the four major waterways in the county (St. Johns River, Matanzas River, Guana River, and Tolomato River) and the beaches of the Atlantic Ocean provide significant opportunity for outdoor activity-based recreation and for scenic drives. These assets are appealing to a wide audience and have numerous potential applications which can be utilized without sacrificing their beauty and solitude.

**The St. Johns County arts and culture community is energetic and highly motivated.** While there are opportunities to enhance the sector's integration with the tourism industry and further drive overnight visitation, the arts and culture community is among the county's best organized groups and one with a great amount of upside potential for growth. This energy can be seen in the many forms of artistic expression found in the county, and particularly in the number of live performance venues located in the destination. There are also a large number of special events held throughout the year, many of which are focused upon the arts and especially live performances.

**Market research among both leisure travelers and meeting planners demonstrates that they have generally positive visitor perceptions and experiences in St. Johns County.** The large amount of traveler research performed for this project consistently demonstrated that most visitors have had exceedingly good experiences in the area, and this was particularly true of recent visitors to the county. There were very few negatives expressed by visitors in the qualitative and quantitative research executed in the process. And non-visitors in the research have generally expressed few negatives about the area, too, although they were much less likely to have formed *any* kind of opinion about the destination at all.

**The destination is fortunate to have stakeholders who invest heavily in their own sales and marketing.** St. Johns County has a large number of individual travel and tourism entities that generate marketing and sales activity, and supplement the efforts of the TDC and the VCB. This includes many of the attractions and hotels within the destination, outlet malls, the PGA, and even upscale residential developments (especially during more prosperous economic times). This activity augments the county-wide work of the TDC and VCB by promoting specific reasons to visit the county, and by generating communications which in many cases target specific segmented audiences such as golfers.

# Situation Assessment

**St. Augustine's historic district is an anchor for the primary tourist magnet to the area.** The large and popular historic district within the city of St. Augustine is a natural draw for most visitors, and represents a lively, walkable core which is found in few American cities. The district boasts diverse dining, shopping, accommodations, nightlife, rich history, attractions, fascinating architecture, and an appealing Spanish colonial influence. It possesses a National Park Site which provides instant credibility and an anchor attraction, and sits adjacent to a scenic waterway. The historic district also has a large, modern parking facility which can accommodate almost 1,200 vehicles and which reaches its capacity only about 20 days out of the year.

**The county has a wide variety of communities within its boundaries.** St. Johns County is a virtual microcosm of Florida. With the exception of a large metropolitan downtown core, the county can offer something for every taste in Florida destinations: bustling upscale suburbs; laid-back small beach town; luxury resort community; peaceful farming hamlet; historic downtown city with a scenic waterfront; bustling beach areas; and unspoiled rural landscapes.

**The local travel and tourism industry has deep expertise in both the public and private sectors.** Across St. Johns County's visitor industry, there appears to be deep levels of both skilled professional expertise and personal commitment to growing the category. The region is fortunate to have professional and talented staff serving the needs of the industry and the visitor in municipal and county government, the visitors and convention bureau, and throughout the private sector. There is great enthusiasm for the destination among many of these individuals, as there should be. Many of them have been honest about St. Johns County's strengths and weaknesses, while seeing there is still great opportunity for the destination even amidst the current economic slowdown.

**There are several highly engaged and motivated sectors of the local industry.** There are a number of groups and special interests within the local travel and tourism category who are active and enthusiastic about the industry, and who have worked hard to create memorable visitor experiences. Their energy is admirable, and can be a genuine asset for the community. A coordinated effort to use this energy in the best way is needed, however.

**St. Johns County has a potentially strong multi-cultural destination appeal.** As a consequence of its Spanish heritage and rich African-American history, SJC has visitor assets that could potentially appeal to a wide audience of ethnic diversity. PGAV's research demonstrated that the county has not yet fully tapped into this market potential. There is significant opportunity for both expanded target marketing and product development to motivate more visitors from ethnic audiences.

**There is a wide variety of accommodations available to the leisure traveler and the meeting planner.** While there are destinations that possess a larger number of hotel rooms than St. Johns County, very few can exceed the tremendous variety of accommodations offered by hoteliers in the area. There is literally something to appeal to almost every taste in lodging—from small, quaint bed and breakfasts and inns to major national chain hotels in plush resort settings. Again, much like its beaches, the variety of accommodations places the county at least in a position of parity with other destinations—St. Johns County will not lose visitors because the county does not have a particular type of hotel.





# Situation Assessment

## Weaknesses

**The incredible diversity of the destination is both a strength and a weakness.** As one hotelier said during one of our early interviews on the master plan project, “The diversity of the destination leads to irrelevance.” The diversity of activities, attractions, cultures, history, geographies, and other attributes of the St. Johns County destination experience creates a tremendous portfolio of “stuff” for visitors to do and see. But it can also lead to a brand positioning that is poorly articulated, or a destination that attempts to be “all things to all people.” There is also an undeniable political dynamic within the county which creates pressure to allocate resources—money, staff, marketing—across a spectrum of needs and wants.

**There is a lack of coordination and cooperation.** One of the comments heard most frequently during interviews with industry stakeholders is that various segments of the St. Johns County travel and tourism industry don’t work together very well, or work together at all. This comment was directed at the relationships between government entities, between private and public sectors, and between private organizations and businesses. There were a variety of reasons given for why this situation exists—mutual suspicion and distrust; turf battles; lack of shared vision; no feelings of mutual benefit; perceived inequalities in resource distribution—but the most common reason seems to be a failure to communicate regularly with each other, and a lack of empathy and shared goals.

**There is little cohesiveness to the St. Johns County, and particularly St. Augustine, visitor experience.** In some ways, the eclecticism of the St. Johns destination experience can be perceived as a strength—it provides an entrée to a wide variety of audiences and a range of activities and attractions for visitors. But it can also lead to a visitor experience that goes from being deeply immersive and “on brand” to one that is jarringly off-brand within the space of a city block or two. One stakeholder correctly noted that St. Augustine has great assets, but “we make it so hard on the visitor to access them.”

**There is no sense of arrival in America’s oldest city.** Cities are, by definition, not theme parks. They are places of diverse economic activity, and usually exist for many reasons other than just tourism. However, St. Augustine is a special place with a unique history unlike any other in the world. Yet there are virtually no gateways into the city that provide a sense of arrival, and its historic districts are poorly defined. It is almost impossible to tell where the “historic” experience begins and ends. The City Gate could be a signature landmark for the city of St. Augustine, but it is located on an island that is a virtual no-man’s land which is difficult for most visitors to access and its historic significance is poorly identified. (It could also be a major photo opportunity for most visitors, generating a considerable amount of word-of-mouth promotion through photo sharing.)

**There is no single venue that tells the St. Augustine story in a consistent, credible, and compelling manner.** There are multiple attractions that tell only parts of the St. Augustine story, chapter by chapter. There are venues such as the Government House Museum and the Colonial Spanish Quarter Museum which use their historic venues and surroundings extremely well to tell the St. Augustine story with credibility and authenticity, but which possess space and resource limitations to convey size and scope. And there are other venues which present the story of St. Augustine in a highly commercialized setting which may or may not be perceived as authentic.



**The area's African-American heritage is not presented in a manner that conveys the significance of the story.** The story of Fort Mose is a remarkable one, likely known to few history enthusiasts and even fewer tourists who come to St. Johns County. Unfortunately, the current state historic site only hints at the magnitude of what Fort Mose represents. While the outdoor interpretive signage contributes to the authenticity of the site, the exhibition venue is small, there are limited facilities and parking on site, and it is very challenging for the typical visitor to find. Likewise, the ACCORD Freedom Trail is another hidden asset that could be strongly compelling to an untapped audience.

**Despite the vast array of attractions, activities, and hotels in St. Johns County, there appears to be little packaging and few partnerships between tourism entities.** Creating a culture of collaboration in the county can start with building mutually profitable relationships. Packaging is just one of the ways to drive revenue and extend length of stay. In the destination, we can create more cohesive visitor experiences that are user-friendly. There are numerous creative packaging opportunities that exist, but they will require facilitation and education. As an example, the St. Augustine Amphitheater is a very impressive venue with an extraordinarily dynamic and creative staff, and the facility is utilized on a nearly continual basis. It could be a substantial driver of increased average length of stay in the county, but it needs to be better integrated into the local tourism industry through opportunities like packaging to reach its full potential as a motivator of overnight visitation.

**Culinary tourism is a missing visit motivator for St. Johns County.** It cannot be emphasized enough that the county has excellent restaurants. And the St. Augustine Independent Restaurant Association (SAIRA) is an important advocate for the local culinary industry, and a strategic partner for tourism in the area. But given the area's breadth of culinary assets, history, agricultural roots, and ethnic heritage (particularly the Spanish and Minorcan influences), it is surprising that the destination does not have a stronger base of culinary tourism. During the benchmarking interviews with other similar destinations, the Charleston (SC) CVB observed that culinary tourism is now more of a motivator for visitation to Charleston than history. Given the growth and media interest in culinary tourism over the last decade, this is a segment ripe with promise for St. Johns County.

**The scenic western part of the county is virtually ignored and undeveloped as a tourism asset.** Understandably, any discussion of uses of the region along the St. Johns River from Hastings to Switzerland should start with protecting its unique natural habitats and unspoiled scenic assets. This is an extraordinary place of farmland, forests, and waterways that cannot be taken for granted, and should be granted additional measures of protection to preserve it. There are effective ways of tapping into its tourism potential, however, which do not involve destroying its pastoral qualities or commercializing it. These tactics include the creation of thematic trails (for motoring, biking, and boating); the establishment of a culinary heritage tourism hub in the town of Hastings (which is consistent with its agricultural heritage and a potential focus upon culinary tourism); additional access points on the St. Johns River; birding trail opportunities; and support for the St. Johns River Blueway initiative.



# Situation Assessment

**The lack of a countywide wayfinding system limits the opportunities for cross-selling other parts of the destination.** While there is a city of St. Augustine wayfinding plan currently in limited implementation, there is nothing that ties the entire county together as a single destination entity. A countywide wayfinding system would certainly provide significant benefits to the SJC visitor—in addition to the primary benefit of telling the visitor how to get from point A to point B, it also conveys a message to the visitor that “We recognize you are our guests and want you to feel comfortable here.” But it can also act as a critical marketing cross-selling medium to the county, helping promote the other parts of the area and establishing a unified destination presence while directing visitors to important hidden treasures. A new wayfinding system can also provide a contemporary interpretation of historic landmarks in the county, rather than just the typical “history on a stick” markers found in St. Johns County and throughout other destinations. Finally, wayfinding can help address the absence of a sense of arrival in St. Augustine and elsewhere.

**St. Augustine’s waterfront is a largely hidden visitor asset.** Given the importance of the Matanzas River to the history of the city, it is a little surprising that downtown St. Augustine is largely cut off from the river. There is an existing promenade along the river from the Castillo de San Marcos running south past the Bridge of Lions, but the walkway is narrow and the area not especially visually appealing from a visitor perspective. Visitors and residents alike in other cities enjoy being on the water, and the downtown historic district is an enjoyable, walkable destination. But there is little unity between the riverfront and the historic district, and no interpretation of the river’s history and its connection to St. Augustine. Despite the limited amount of land available in this area, the riverfront could be a substantial visitor attraction in its own right, and contribute to the historic and romantic ambience of the city.

**St. Johns County’s arts and culture community faces a number of obstacles to realizing its potential as a driver of tourism.** There are many things that the arts and culture community does extremely well as they relate to tourism—so much so that PGAV recognizes it as a core destination competency for St. Johns County. But there are a number of barriers to further establishing this as a motivator of visitation. The lack of a true civic performing arts facility in the hub of cultural tourism in the county, St. Augustine, will be ameliorated somewhat by the opening of the Ponte Vedra Concert Hall, but the dependence of the arts and culture community upon the Flagler College venue (a privately-owned facility on a growing college campus) still presents challenges. The high cost of living for artists residing in St. Johns County and the scarcity of affordable working space in St. Augustine also limits the growth of the sector. Downtown ordinances and restrictions upon special events hamper the ability to showcase local artists in performance settings. And it is readily apparent that the hotel industry and the arts and culture community need to establish a closer dialogue, preferably one based upon mutual interest and the need to create lasting economic impact and genuine return on investment.

**St. Johns County must embrace civic tourism.** This plan seeks to grow tourism volume by building on the County’s inherent strengths. However, the County must take great care in ensuring that such growth is accomplished without threatening these assets, including the vibrant, diverse, and wonderful neighborhoods that comprise much of the County’s character. As such, the County must incorporate “Civic Tourism” approaches into its ongoing development process. Civic tourism is based on the philosophy that in addition to economic development, tourism can help communities preserve cultures, protect the environment, save historic districts, encourage citizen participation, and in general, foster a healthier quality of life. This plan strongly recommends that the County embrace Civic Tourism principles and incorporate structured community involvement in its ongoing development process.

**While St. Johns County's golf assets are absolutely world-class, more can be done to establish the county as a world-class golf destination.** The leisure traveler and meeting planner research showed that the community still lacks awareness even amongst golf enthusiasts as a links destination. One reason for this may be that those same world-class golf assets are perceived as individual entities and not part of the same destination, in close proximity to each other and to both St. Augustine and Ponte Vedra. (The lack of geographic awareness amongst Americans cannot be understated.) Ponte Vedra's close relationship to Jacksonville (geographically and otherwise) undoubtedly hinders the county as a stand-alone golf destination, particularly if travelers perceive that the World Golf Hall of Fame is more closely linked to St. Augustine than Ponte Vedra. And even a place like TPC Sawgrass may be a victim of its own success and fame—it is likely perceived by many amateur golfers as a private club, not open to the general public, because it is so closely aligned with professional golf.



**The St. Augustine Beach pier area is both an underutilized tourism asset and an impediment to the brand equity of the destination.** The pier area is already serving an important role for both the community and the destination (with its information center, tackle shop, splash park, pavilion, the WPA-era building housing the St. Johns Cultural Council, and the pier itself), but it also has some significant untapped potential as the center of activity for the entire Anastasia Island beach area in the central part of the county. As it currently exists, though, the structures in the area are somewhat dilapidated and the pier itself is something of a physical barrier to beach visitation. An investment in the master plan for enhancements to the pier area would serve as a substantial public commitment to the area and likely encourage new private tourism-related development along A1A Beach Boulevard. Plus, new uses of the

park and/or the arts building (such as a special event center for weddings and other functions, or as a children's museum) could drive additional incremental visitation to the pier and to St. Johns County.

**St. Augustine has almost no presence along Interstate 95.** It's not surprising that one of the comments heard during the focus groups conducted with leisure travelers in the Atlanta market was that "St. Augustine is easy to miss when you are driving down I-95" in Florida. Other than a few state Department of Transportation interstate-type highway signs, and a smattering of outdoor boards promoting some of the area's attractions and the outlet malls at exit 318, there is little awareness-generating activity for America's oldest city on one of America's busiest interstate corridors. Many of the thousands of motorists passing the major gateways to the county on I-95 are leisure travelers who fall squarely within the county's target audience, but have no idea what destination benefits lie beyond those same interchanges.

**The lack of direct commercial air access into the county is perceived as somewhat of a barrier to increased meeting business.** This was cited as the only major negative associated with St. Johns County among meeting planners surveyed in the research conducted by PGAV. The driving distance from the nearest commercial airport, Jacksonville International (JAX), to the county varies greatly—from about 30 minutes (to Ponte Vedra) to over one hour (to the beaches in southern St. Johns County). While not insurmountable—the county already sees a good amount of meeting and convention business in spite of the lack of service, particularly from drive markets—the distance does limit the potential of St. Johns County to attract some regional and national meetings. Also, since Ponte Vedra is only about a half-hour from JAX, the issue may be more one of perception. The St. Augustine Airport is actually the same driving time to Sawgrass as JAX, and any new commercial air service introduced at St. Augustine will be far less than that currently found at Jacksonville.

## St. Johns County Destination Overview

This provides a summary of PGAV's analysis of St. Johns County as a destination, with an overview of the strengths and weaknesses of the major geographical entities within the county that draw visitors or have the potential to attract new visitation.

### St. Augustine

America's oldest city was founded in 1565 and will be celebrating its 450<sup>th</sup> anniversary in five years. The area was first explored by Ponce de Leon in 1513, and has a long and colorful history involving many cultures: native Timucuan Indian, Spanish, French, British, Minorcan, African, and American. The city contains many historic buildings and landmarks, among them the Castillo de San Marcos, a waterfront Spanish fortress now maintained by the National Park Service. The heart of the downtown area is a historic district that is the most popular attraction in the region, boasting quaint streets, shops, restaurants, accommodations, museums, and activities. Downtown St. Augustine is adjacent to the Matanzas River, which separates it from nearby Anastasia Island and St. Augustine Beach. The two are connected via the landmark Bridge of Lions, which is set to reopen in 2010 after a long reconstruction.

In addition to the historic district in downtown St. Augustine, the city has many other attractions for visitors. There are many popular museums and historic sites in and around the downtown area, and several areas of natural and scenic interest just a few minutes from the city center. Many miles of white sand beaches are also nearby. There are several tour companies which offer heavily promoted and highly popular guided daytime and nighttime tours, including those operated by Historic Tours of America and Ripley's. In addition, there are numerous events held in the city throughout the year.

The city's historic character and quaint ambience attracts a wide variety of tourists, motivated by many different factors, including couples seeking a romantic getaway; family travelers wanting to combine history with the beaches and other activities; school groups and other tour and packaged travelers; transient travelers on their way to other Florida destinations, or visiting as daytrippers from places like Daytona Beach, Orlando, and Jacksonville; arts and cultural enthusiasts; event visitors; history buffs; and beachgoers. St. Augustine is also appealing to many of those visitor types because it is perceived as a quiet, authentic Florida destination that hasn't been overbuilt or lacking in personality. Because of its diverse appeal and varied flavor, the city competes with numerous other destinations for visitors (as does all of St. Johns County).





### ***Destination Strengths***

- America's oldest city
- A vast number of stories that can be told, many of which already are by numerous entities in the city and county
- The upcoming 450<sup>th</sup> anniversary of the city's founding, and the 500<sup>th</sup> anniversary of the state of Florida's discovery
- Quaint, appealing downtown and adjacent historic districts
- Landmark historic sites
- Diverse range of accommodations, shopping, and dining
- Many attractions and activities appealing to a wide audience of visitors
- Strategic location in north Florida just off Interstate 95, a primary north-south highway corridor
- Passionate and motivated community and civic leaders
- A desirable downtown waterfront
- A rich tradition of multi-cultural history and influences, including Spanish, Minorcan, and African-American
- A popular landmark National Park Service property in the heart of downtown
- Private investment in sales and marketing to draw visitors to the city, and to encourage them to spend money
- An amazing range of architectural styles in the downtown area
- A burgeoning arts and culture scene, with numerous galleries, performing arts groups, and cultural heritage events
- A newly constructed visitor information center adjacent to a large modern parking facility with almost 1,200 vehicle spaces
- Numerous special events throughout the year
- The significant presence of Flagler College, which provides a beautiful campus in the heart of downtown; well-preserved historic architecture; and an auditorium used for private and public events
- An easily walkable downtown district
- The St. Augustine Amphitheater
- Investment by public and private entities in the historic preservation of many structures
- A municipal government committed to historic preservation, tourism, and interpretation
- Close proximity to many other regional assets, including beaches; beautiful natural scenery; outdoor recreation; golfing; large conference facilities; World Golf Hall of Fame and other golf activities

# Situation Assessment

## ***Destination Weaknesses***

- A complete lack of a sense of arrival in the city and the historic district
- Poorly defined and interpreted historic district boundaries
- There is no single venue that tells the entire St. Augustine story in a compelling and significant manner
- A lack of awareness of the city's African-American heritage and historic sites
- A lack of a comprehensive wayfinding system for motorists and pedestrians
- Very little positive awareness-building for the destination along Interstate 95
- The lack of a publicly-owned civic performance venue
- A scenic waterfront that is not well integrated into the downtown and the historic district as an attraction and visitor experience
- Very little connection to the city's Spanish heritage through events, dining, and other forms of interpretation
- A high cost of living for hospitality industry workers, artists, and others
- Numerous infringements upon the historic integrity of the downtown area, with several "off brand" experiences potentially detracting from the quality of the visit
- The perception of a lack of commercial air service in St. Augustine as a barrier to visitation
- The distance from another major tourism center in the county, Ponte Vedra, and the lack of connectivity (both perceptual and physical) between the two areas
- The perceived and real availability of parking in the downtown district, away from the Historic Downtown Parking Facility
- The restrictions upon artists in the downtown areas, which limits some types of credible and popular demonstrations and artists
- A poorly utilized downtown visitor information center
- Multiple segments of the tourism industry which do not cooperate or regularly talk with each other to coordinate and plan for the most effective use of limited resources

## Ponte Vedra and Ponte Vedra Beach

This area, in the northeastern corner of St. Johns County, has grown rapidly in population during the last two decades and is now the largest population center in the county. Because of its proximity to Duval County's fast-growing southern suburbs, it is in many ways more of a suburb of Jacksonville and less a part of St. Johns County. The completion and improvement of the Butler Boulevard freeway opened up the area to easy access from Jacksonville in the 1990s, and the tourism industry has benefited from the this improved access to Interstate 95 (one of the most important north-south tourism corridors in the United States) and Jacksonville International Airport. The area prides itself on a high quality of life for its residents and visitors, and they are extremely upscale and highly educated. Household incomes of residents in the Ponte Vedra area average over \$100,000. There has also been a large amount of new development in the area, most notably centered on the planned community of Nocatee located to the southwest of Ponte Vedra Beach.

The Ponte Vedra tourism economy is anchored by four significant entities: the Ponte Vedra Inn and Club, the Marriott Sawgrass resort, TPC Sawgrass, and PGA Headquarters and Tour Academy. These world class golf-centric assets, as well as the meeting facilities at the two resorts and the beaches in the community, comprise the primary destination drivers for the northern end of St. Johns County. TPC Sawgrass is also home to THE PLAYERS Championship, held in early May and widely considered to be golf's "fifth major." The year-round golf environment and the high caliber of golf assets have attracted a large number of past and present PGA Tour professionals as primary and seasonal residents. There is also an emerging arts and culture presence in this area, anchored by the Cultural Center at Ponte Vedra Beach and the soon-to-open Ponte Vedra Concert Hall. In March 2010, Nocatee will be opening its Splash Water Park, capable of accommodating up to 1,000 guests.

The St. Johns County Tourism Development Council (TDC) has lent its financial support to the operation of the Ponte Vedra Chamber of Commerce's visitor center, located at the chamber's offices near the Duval-St. Johns county line. This visitor center is a small facility, staffed by the chamber's receptionist and consisting mostly of brochure racks featuring area businesses. There is a small Florida Department of Transportation sign on Highway A1A directing visitors to the center.





# Situation Assessment

## ***Destination Strengths***

- World-class golf assets and a reputation for golf excellence
- Highly upscale residents and visitors
- St. Johns County's closest access to commercial air service
- First-class meeting and convention facilities at both Marriott Sawgrass and Ponte Vedra Inn and Club
- Location of PGA Headquarters and PGA Tour Academy
- Close proximity to Jacksonville's corporate presence
- An emerging arts and culture presence, particularly with the opening of the Performing Arts Center
- Private sector tourism entities that invest in marketing and sales, thereby promoting the destination with their own dollars
- Experience in hosting international sporting events
- New visitor assets such as the Nocatee Splash Water Park
- Proximity to the Guana Tolomato Matanzas National Estuarine Research Reserve (GTMNERR) and Guana River State Park
- Beautiful beaches without much commercial development

## ***Destination Weaknesses***

- Relatively little public beach access
- Few hotel rooms with walkable access to the beach
- Distance from St. Augustine and other parts of the county
- A small and hard-to-find visitor center
- A limited number of non-golf related activities in the immediate area
- A lack of a well-defined city "center" or core of activity
- Development pressures as Jacksonville's suburban sprawl moves south and the area continues to be appealing to commuters, retirees, and second-home residents

## St. Augustine Beach

The destination within St. Johns County with the most traditional hotel rooms directly on the beach, St. Augustine Beach has a strong role in the county's overall tourism appeal. St. Augustine Beach is located on Anastasia Island within a very short drive of downtown St. Augustine, across the Matanzas River. In addition to its beaches, much of the tourism and recreational activity in St. Augustine Beach is centered upon the county-operated ocean pier, which is at the north end of Highway A1A Beach Blvd. The pier sits on a four-acre beachfront park that also includes a popular splash park, beach volleyball courts, restrooms, tackle shop, visitor information center, pavilion, and a Works Progress Administration-era building which houses offices of the St. Johns County Cultural Council and a private dance studio. The county's parks and recreation department has proposed a \$5 million makeover of the pier and park area, which would include additional parking, expanded and renovated restrooms, and a longer and more elevated pier.

There are numerous lodging properties within close proximity to the pier, along Highway A1A Beach Boulevard, most of which are mid-priced chain accommodations and of an appealing smaller, more intimate scale. There are no high-rises along the beach here (or anywhere else in St. Johns County, for that matter). There are also a number of restaurants, shops, and residential properties in the immediate area. The hotels along St. Augustine Beach are also within just a few minutes' drive of several popular attractions on Anastasia Island, including the St. Augustine Amphitheater, the St. Augustine Lighthouse Museum, and the Alligator Farm.



# Situation Assessment

## ***Destination Strengths***

- Several miles of easily accessible beaches
- Numerous hotel rooms directly upon the beach or just across Highway A1A
- No high-rise residential or hotel developments
- A popular ocean pier and park area, including a splash park, a large pavilion, volleyball courts, and visitor information center
- A large, attractive historic structure adjacent to the pier that is publicly owned
- An appealing, affordable low-key family beach destination
- Close proximity to downtown St. Augustine and the attractions on Anastasia Island

## ***Destination Weaknesses***

- The pier area requires a large financial investment to upgrade its facilities and enhance its appeal, and to expand its limited parking
- A somewhat limited range of accommodation types
- A less-than-appealing streetscape along Highway A1A Beach Boulevard
- The WPA structure at the pier is currently underutilized given its prominence, availability of parking, and historic architecture



## Vilano Beach

Vilano Beach is a small beach community of 2,500 full-time residents northeast of downtown St. Augustine, just over the Usina Bridge on scenic coastal Highway A1A. The town possesses a very desirable location between the Atlantic Ocean and the Intracoastal Waterway, with scenic views looking west towards downtown St. Augustine. It also sits at a key traffic junction on a primary route between St. Augustine and Ponte Vedra Beach.

A public-private partnership between St. Johns County and the North Shores Improvement Association has led to the creation of the Vilano Beach Town Center near this same intersection. The Town Center is an appealing New Urbanist collection of historic Florida Vernacular and Art Deco structures and new streetscaping design improvements on a 24-acre waterfront site adjacent to a free public fishing pier on the Intracoastal Waterway. The Center is envisioned as a mixed-use lifestyle center in the heart of Vilano Beach, with a combination of retail, residential, and tourism-based businesses. The area also has potential as a special events venue. Current efforts are focused upon recruiting new businesses to the Town Center to stimulate further growth.

There are limited accommodations in Vilano Beach, but one of the most prominent is a large new Hampton Inn and Suites. The county owns a dilapidated building, an old restaurant site called Fiddler's Green, directly on the Atlantic Ocean beach behind the Hampton Inn and Suites at the Vilano Beach Oceanfront Park (and adjacent to the Vilano beach access ramp). The Fiddler's Green structure would need about \$4 million of renovations to make it suitable for use. There has been some discussion of turning it into a wedding and social functions facility, which would be a potentially ideal tourism use given its adjacency to the park's outdoor pavilion.



# Situation Assessment

## ***Destination Strengths***

- A strong location very close to downtown St. Augustine, but with a very different ambience and environment
- Excellent scenic waterfront views on both the Atlantic Ocean and the Intracoastal Waterway
- Dramatic views over the Matanzas River looking back towards St. Augustine, particularly at sunset
- A multi-million dollar public-private investment in the Vilano Beach Town Center, which could serve a variety of tourism-related uses
- A very walkable beachfront community
- A well-located county park and the county-owned Fiddler's Green building, which provides opportunities for the development of a small meetings and event facility
- The Town Center and the county park have substantial potential as special events venues for small-scale events, such as concerts, antique shows, car shows, and farmer's markets
- Close to the Guana Tolomato Matanzas National Estuarine Research Reserve (GTMNERR), Guana River State Park, and their related scenic outdoor recreation assets, as well as numerous quiet beaches between Vilano Beach and Ponte Vedra Beach

## ***Destination Weaknesses***

- Very few hotel rooms which provide a base of visitors who can park their cars and easily walk the community and to the Town Center
- Limited public parking for large-scale events
- Few retail businesses at present to act as a draw to Vilano Beach and provide services to residents and visitors alike
- Upkeep and renovation of private properties needed to bring other structures up to the standards of the Town Center

## Butler Beach, Crescent Beach and Beachfront Locations in South St. Johns County

The beach communities to the south of St. Augustine Beach and north of the Flagler County line along Highway A1A include Butler Beach, Crescent Beach and Summer Haven. These areas consist primarily of a few smaller beachfront hotel properties, beach home residences, and numerous rental properties such as homes and condominiums. There are also a number of scattered retail and service-oriented businesses to serve these communities in the area. At the south end of the area, the National Park Service operates the historic Fort Matanzas National Monument, and the Marineland aquatic attraction sits astride the Duval-St. Johns County line just south of the Matanzas Inlet Bridge.

This is a quiet, lightly populated area with a low density of development and easy access to Interstate 95 via state highway 206.

### ***Destination Strengths***

- Beautiful soft sand ocean beaches in an area with relatively little commercial development and no high rise buildings
- Fort Matanzas National Monument is a critical part of the St. Augustine story
- Close to Marineland, one of the oldest research-based aquatic attractions in the nation
- A large inventory of rental units, many of which can accommodate large families and groups
- Preserved marsh and wetland areas along the Matanzas River
- Several sites provide excellent fishing and boating
- Serenity and solitude (relative to many other Florida beach destinations)
- Easy access to Interstate 95
- Close proximity to Faver-Dykes State Park, a heavily wooded scenic area along Pellicer Creek featuring birding, canoeing, fishing, and nature hikes
- Strong repeat visitation from families and other leisure visitors

### ***Destination Weaknesses***

- Far from commercial air service (Jacksonville International Airport is about as far a drive from Crescent Beach as Daytona International Airport, and just a little closer than Orlando Sanford International Airport on Orlando's northeast side)
- A limited number of traditional lodging properties



# Situation Assessment

## Hastings

Hastings is located in southwest St. Johns County, about 30 minutes from downtown St. Augustine and about 12 miles from Interstate 95 on state highway 207. This is a small town in a rural, primarily agricultural environment. Hastings is considered the “Potato Capital of Florida,” and potatoes (along with several other crops) were one of the primary crops supplied by area farms to Henry Flagler’s resort hotels at the turn of the twentieth century. The area is very sparsely populated and has little tourism infrastructure such as hotels and restaurants.

### ***Destination Strengths***

- A largely undiscovered community off the beaten path, with an amazing story tied closely to the history of all of St. Johns County and state of Florida
- A long heritage of farming and a connection to the land
- Strong potential for developing agritourism programs and destination products tied to the increasing popularity of local foods and appealing to “locavores,” those consumers who express a strong buying preference for locally-raised foods
- Good access to Interstate 95 via a modern four-lane highway
- Unspoiled farmland and forests
- Close proximity to the St. Johns River

### ***Destination Weaknesses***

- Virtually no tourism infrastructure, such as hotels and restaurants
- A lack of an anchor attraction or other medium for telling the Hastings story
- There are currently few visit motivators to the town

## World Golf Village

A planned development of homes, two golf courses, several businesses, hotels and other accommodations and which includes the World Golf Hall of Fame and the St. Johns County Convention Center, World Golf Village sits adjacent to Interstate 95 at exit 323, just northwest of St. Augustine. The centerpiece of the development, the World Golf Hall of Fame, was moved in 1998 from Pinehurst, North Carolina to its present location. The convention center is adjacent to the newly renovated Renaissance Resort at World Golf Village; the hotel and center feature 301 hotel rooms and 86,000 feet of first-class meeting space. One of the two golf courses, the King & Bear, is the only course in the world to be co-designed by Arnold Palmer and Jack Nicklaus. WGV also includes a PGA TOUR Academy.

The World Golf Hall of Fame features several permanent exhibitions, a rotating exhibit space, a café and retail shop, and an IMAX Theater. There are also several spaces for private events in the facility. The venue attracts up to 300,000 guests each year, many of whom are driving through on their way to and from other destinations in Florida. It also hosts the annual induction ceremonies of the newest Hall of Fame members each fall. It is owned by the World Golf Foundation.

### ***Destination Strengths***

- Prominent location on Interstate 95
- Modern, first-class facilities and venues
- Substantial equity associated with the World Golf Hall of Fame brand
- Proactive marketing communications staff promoting the World Golf Hall of Fame and its associated events to a worldwide audience through strong media relationships
- Large hotel and conference center with its own sales staff
- Captures a large number of transient visitors coming to Florida

### ***Destination Weaknesses***

- Somewhat remote from St. Augustine and Ponte Vedra Beach, both in geographic distance and in connection to their destination brands
- Appeals largely to the golf enthusiast only
- A limited number of shops and restaurants, most of which are golf-themed



## Western St. Johns County

The western side of St. Johns County is highlighted by forests, wetlands, farmland, and some residential development, with mostly low population density and little commercial development. The dominant feature of this region is the St. Johns River, which forms the county's western border. The river is followed closely by county highway 13, part of which is the William Bartram Trail on the county's northwest side. This scenic highway is draped in live oak canopies, and provides gorgeous views of the river and the adjoining forests and fields. The road is especially suited to cycling, with low traffic counts and easy roadways. The Bartram Trail pays homage to American naturalist William Bartram, and passes through several areas of historical, cultural, and archaeological emphasis. There are a number of small parks along the river, and many opportunities for birding. Downtown St. Augustine is approximately a 45 minute drive from the northwestern corner of the county.

There are at least two county master plans which are important parts of the preservation of this environmentally sensitive area: the William Bartram Scenic & Historic Highway Corridor Management Plan, and the St. Johns River Blueway initiative. Both of these are potentially important steps to preserving the delicate nature of this region, but also for developing recreational opportunities that may foster tourism throughout the county. The extreme northwestern part of the county, around Switzerland and Fruit Cove, is increasingly becoming a part of suburban Jacksonville as the city expands southward. This area is under the greatest amount of development pressure of any area in the county.

### ***Destination Strengths***

- Many areas of great natural scenic beauty, with little commercial development
- Anchored by the scenic and historic St. Johns River, one of only 14 American Heritage Rivers as designated by the U.S. Environmental Protection Agency in 1997
- The William Bartram Scenic Highway, which provides a premier route for motoring and biking
- An area rich in historic and environmental significance, and reminiscent of "old Florida" or "wild Florida"
- Generally low population density along the southern two-thirds of the area

### ***Destination Weaknesses***

- Limited St. Johns River boating access
- The threat of Jacksonville suburban sprawl in the northwestern part of the county
- The area is virtually unknown to visitors, and truly "off the beaten path" of most visitors to St. Johns County
- Limited tourism-related services





*"It's the brand name and its associations that give  
the product meaning in the consumer's mind."*

*– Al and Laura Ries*

# Brand Strategy

The destination brand consists of many different elements. Most people tend to assume it is just the visual or verbal identity of a product, service, or even a place, but it is more than the logo or tagline or brand name. It's more than the advertising and other marketing communications that is used to promote the brand, and it's more than just the product itself. All of those things can embody the brand and represent certain attributes of it. But the brand is, above all, the emotional connection the customer has with the destination.

In some ways, destinations make for ideal brands. The traveler usually invests a significant amount of their time and money in the visit, and the planning for a visit tends to be a highly engaged process. Some of our greatest memories of sharing time with friends and loved ones are forged as part of a trip, and we relive those memories repeatedly in the form of stories and photos, or memorabilia collected or purchased while on a vacation. The brand equity of a leisure destination is far deeper than that of soap, for instance. In another way, however, destinations make for lousy brands for the travel industry—there is usually very little that destination brand managers can do to influence every aspect of the product they are marketing. Managing every traveler touchpoint in a city, county, or state is virtually impossible, whereas the brand manager for soap can influence almost everything about its design, its packaging, and even the display from where it is purchased.

Much of the St. Johns County master plan has focused upon creating stronger emotional connections with the visitor, or making the brand more compelling for potential visitors. This section will focus upon positioning St. Johns County as a destination. It will generally not go into specific tactical recommendations such as logos, taglines, or specific wording of key messages. The county has excellent tourism marketing professionals for that task. It is simply our intent to shape the strategy around which those messages (and other elements, such as new destination products) are created.

PGAV has identified nine destination strategies for St. Johns County. Each of the nine works by itself, but the hope is that each of the nine can be applied with equal vigor to the county's tourism development efforts.

## Brand Strategy #1--Differentiate with authenticity

PGAV believes that the authenticity of its visitor experiences is the key brand benefit for St. Augustine, Ponte Vedra and the Beaches. It is the most compelling overall destination attribute that the county can truly own and leverage as an emotional brand driver.

In both the qualitative (focus groups) and quantitative (online survey of leisure travelers) market research conducted for the master plan project, travelers were asked to evaluate several different new destination product concepts for St. Johns County. One of the most important findings in this research was that concepts which performed best in generating interest in the destination were those that were in touch with what respondents said was the “reality” and “uniqueness” of the area. Those activities that represent something that a visitor can do or see somewhere else did not generate nearly as much interest as those that are *authentic* to St. Johns County.

In fall 2009 PGAV commissioned a major consumer research study on the concept of authenticity. Authenticity means different things to different people, and so the study attempted to quantify the attributes associated with authenticity by talking to leisure travelers nationwide. The results of the study indicated that there are five major categories of authenticity, and certain attributes associated with each.

### PGAV's Attributes of Authenticity

<u>Category</u>	<u>Attributes</u>
Unique	Original, Artistic, Inventive, Spontaneous
Real	Historical, Natural, Landmarks
Human	Genuine, Trustworthy, Caring
Non-Commercial	Simple, Not fake, Not glitzy, Not “out to make a buck”
Social/Emotional	Bonding, Feeling closer to family/friends

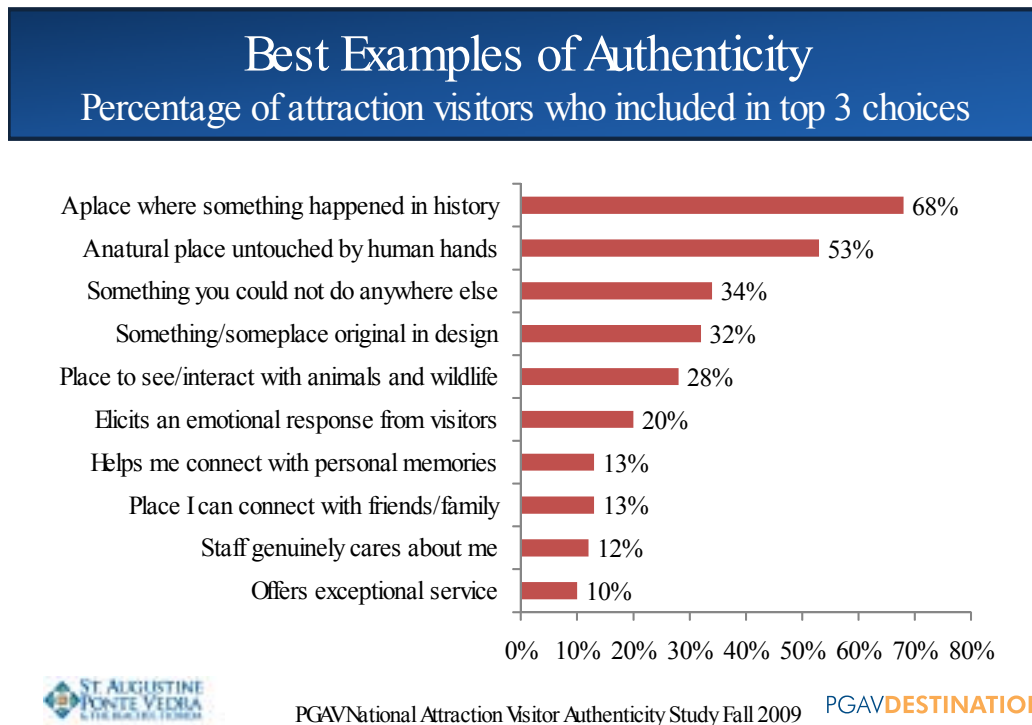


PGAV/National Attraction Visitor Authenticity Study Fall 2009

PGAVDESTINATIONS



St. Johns County already possesses many tourism assets which are and can be perceived as authentic by its visitors. The test of authenticity can be applied to each of the six St. Johns core competencies to determine whether each “fits” as the destination. Authenticity need not be confined to segments of the industry that are usually considered “authentic,” such as historic sites, food, or architecture. PGAV asked respondents to its national authenticity survey what kinds of places and things they consider authentic, and many of the top responses match St. Johns’ tourism offerings extremely well.



While the county offers many examples of positive authenticity to its visitors, the destination unfortunately also lacks sufficient *immersive* authenticity across many of its visitor touchpoints. Its authenticity isn’t often well known or understood in some cases, either. An example can be found in the county’s culinary offerings. Many visitors may not know how a dish like Minorcan chowder fits into the destination’s history and culinary heritage, and that it represents an important part of the authentic culture of St. Johns County. Future brand communications and product development should be geared towards promoting, interpreting, and enhancing this authenticity, so that the visitor understands it and assigns a greater value to the St. Johns visit experience. As noted in the PGAV research, 81% of those travelers who indicated that their last trip included real or authentic characteristics said that those attributes caused them to view the destination or attraction much or much more favorably.

## Brand Strategy #2--Focus on the six core competencies of the destination

PGAV has identified six components of the destination experience that St. Johns County does particularly well, and which can be further enhanced to motivate future visitation and create authentic emotional connections:

- World-Class **Golf** Experiences
- Enriching **Family** Travel Experiences
- Significant **History** Experiences
- Diverse **Arts and Culture** Experiences
- **Romantic** Getaway Experiences
- Natural and Scenic **Outdoor Recreation** Experiences

These six areas have long been among the best-known parts of St. Johns County tourism, so they are not “new.” But they also pass each of the tests for core competency that can be applied to any organization’s product and service offerings:

1. Does the core competency provide access to a wide variety of markets?
2. Does it make a significant contribution to the perceived visitor benefits of the destination?
3. Is it difficult for competitors to imitate?

Organizing around core competencies enables the destination to focus its resources in a more effective manner. It is a way of thinking of the destination as something other than a loose collection of activities that may or may not have any connection to each other. Destination core competencies are built through continuous improvement and investment, and by keeping them relevant to the target market. They should be the focus of ongoing destination brand strategy to enable St. Johns County to compete more effectively for tourism dollars.

The above six core competencies are the best opportunities for St. Johns County to be recognized as world-class in the delivery of an authentic visit experience. St. Johns already has expertise in these areas, and they are capable of generating real and sustained customer interest in the destination. They are also among the top motivations for a visit to the county. By focusing marketing strategies upon these six motivations, it allows the county to segment its target audience by their behaviors and interests, and to create products and communications which address their needs and wants more specifically.

During the PGAV team’s initial project interviews, one stakeholder, in talking about St. Johns’ many different destination attributes, stated that “The diversity of the destination leads to irrelevance.” The stakeholder’s argument was that a destination brand without a strongly articulated positioning—that tries to be all things to all people—risks being irrelevant because it lacks emotional connection or meaning. A destination brand strategy that is focused and builds upon the motivators to visit and the strongest emotional connections to the destination has a much greater chance of being relevant.

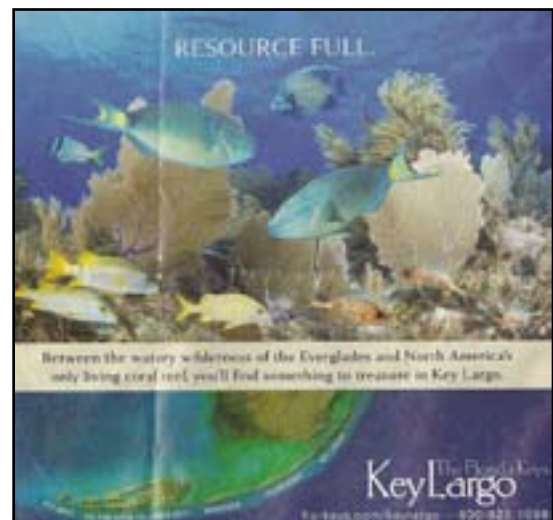
# Brand Strategy

## Brand Strategy #3--Promote visitor interests rather than geographic regions

Many destinations try to promote their sub-destination brands under the umbrella of the broader destination brand, trying to drive visitors to specific communities in the larger destination. This is often done to appease local political interests rather than as an effective destination marketing tool. Unless the sub-destination has extraordinary brand recognition, most potential visitors have no way to distinguish between communities within the destination. This is a barrier to visit planning rather than effective marketing.

A marketing approach that focuses upon specific visitor behaviors and interests is likely to be more effective at drawing travelers to communities (sub-brands) within the destination. There are several geographic regions of St. Johns County that are centers of expertise for these kinds of specific interests. For example, travelers seeking world-class golf will likely be directed to Ponte Vedra Beach and World Golf Village. Visitors seeking beach accommodations in quiet communities close to historic downtown St. Augustine will be directed to Vilano Beach and St. Augustine Beach. Each part of St. Johns County has its own unique identity, and the best way of promoting these sub-brands is to call attention to their expertise within the overall brand umbrella and the six core competencies of the destination. Given that PGAV's marketing research has shown that almost half (46%) of leisure travelers in the target audience in the county's primary marketing area have no previously formed opinions about St. Johns County, further watering down the awareness of the destination by focusing upon sub-brands is an inefficient use of resources.

One destination that executes this somewhat successfully is Key West and the Florida Keys. Key West is obviously the best known destination within the Keys. Yet there are other sub-brands in the Keys that have their own destination identity, and they have been positioned under the Florida Keys umbrella. Islamorada is positioned as the sport fishing capital of the world, while Key Largo is promoted as a premier dive destination.



## **Brand Strategy #4—Create seamless brand experiences within each core competency**

Strengthening the equity of the St. Augustine, Ponte Vedra and the Beaches brand begins with creating more seamless brand experiences for the visitor. While PGAV's marketing research has shown that visitor satisfaction with the St. Johns experience is generally high, there are numerous examples of disruptions to the seamless visit experience that should be minimized or eliminated where feasible. Some of these disruptions are physical or infrastructure related and may require substantial investment, such as a countywide wayfinding program. Others can be minimized through new or improved destination products or marketing offerings, such as thematic trails, interactive mapping, or innovative packaging.

Also, while most previous visitors rate the overall St. Johns experience positively, there are still many opportunities to improve the ratings of the destination's various specific attributes. The percentage of travelers who perceive the county as truly "excellent" still leaves room for improvement.

Focusing just on "Excellent" ratings received from a random regional leisure traveler sample surveyed in February 2009, St. Johns County receives its highest scores for scenic beauty, museums, a place to relax and water recreation. Again, those who have visited the area give it better scores than those who have not visited, but there are only minimal differences between households with children and those without.



# Brand Strategy

Checklist	Total (Base) (400) %	Prior SJC Visit		Kids in Household	
		Yes	No	Yes	No
		(274) %	(126) %	(145) %	(255) %
Overall as leisure destination	22	29	← 6	19	24
Scenic Beauty	30	35	← 21	28	32
Museums, historical & cultural	27	33	← 13	22	29
Place to relax and unwind	26	31	← 16	23	28
Water recreation	26	28	21	22	28
Good for family vacation	25	29	← 17	24	26
Variety of things to see and do	25	30	← 13	22	27
Interesting places to shop	22	27	← 12	19	24
Unique attractions	22	27	← 12	21	23
Quality restaurants and dining	21	24	← 13	16	23
Sites with ecological emphasis	20	24	← 11	17	21
Quality accomodations	19	23	← 13	16	21

Checklist	Total (Base) (400) %	Prior SJC Visit		Kids in Household	
		Yes	No	Yes	No
		(274) %	(126) %	(145) %	(255) %
Fishing	19	21	13	20	18
General outdoor activities	18	22	← 9	16	20
Shopping for local crafts and art	18	22	← 10	14	21
Friendly people	17	22	← 8	18	17
Feel safe and secure	15	18	← 10	16	15
Good roadways/highways	13	17	← 6	12	14
Cultural events and festivals	12	15	← 6	10	14
Good value for the money	11	14	← 5	9	13
Fun things for kids	11	13	8	14	9
Golf	11	13	8	6	→ 14
Exciting nightlife	6	5	6	7	5
Camping/campgrounds	4	4	6	5	4

## Brand Strategy #5—Invest in the brand through a series of continuous improvements and enhancements to the destination’s six core competencies

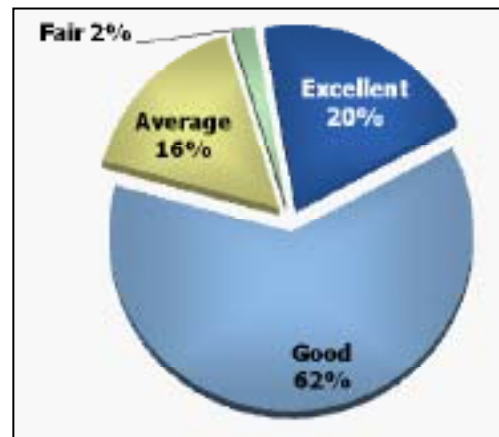
One of the primary objectives for the destination brand managers of St. Johns County in future years should be to create more truly “ownable” assets that represent competitive advantages and are not easily duplicated. Most destinations have assets in common with other destinations—the things that put them at parity with other places. These usually include shopping, dining, a variety of accommodations, good highway access, and some measure of history. Few destinations can claim to be world class, though, in even a few destination attributes. St. Johns County should target such a positioning for its six core competencies. They can be the components that define the destination brand and which generate real and sustained customer engagement.

As noted previously, the overall St. Johns visit experience receives generally positive ratings from past visitors, but few of its individual attributes are perceived as truly excellent. Furthermore, the destination receives a large number of “don’t knows” on some of its most significant tourism assets. In terms of generating interest to visit, these are nearly the equivalent of a negative rating, but they also represent an opportunity to educate the potential visitor to St. Johns County on their significance and benefit. While many respondents in the February 2009 research have an opinion of the St. Johns County area overall and on many of the specific different attributes evaluated, there are some topics where the area’s image is largely unknown, such as golf, camping/campgrounds, an exciting nightlife and fishing. The low Excellent/Good ratings for these aspects of St. Johns County are not necessarily because the area performs poorly, *but because many people are unaware*.

Checklist	Total (Base) (400) %	Prior SJC Visit		Kids in Household	
		Yes	No	Yes	No
		(274) %	(126) %	(145) %	(255) %
Overall as leisure destination	11	7	→ 19	12	10
Golf	54	55	52	59	51
Camping/campgrounds	49	49	47	45	50
Exciting Nightlife	41	39	45	44	39
Fishing	38	39	34	34	40
Cultural events and festivals	32	29	36	31	32
Fun things for kids	29	25	→ 36	18	→ 35
Shopping for local crafts and art	26	21	→ 36	27	25
Museums, historical and cultural	25	17	→ 44	26	25
Sites with ecological emphasis	22	18	→ 32	23	22

This same market research also indicated that for those who have never visited the area, it is cultural events/festivals, unique attractions/ experiences and shopping for local arts and crafts that index relatively high on importance to them but on which the county is perceived as underperforming. Since “performance” among these respondents is actually their perception of how well the county delivers, the solution is to enhance both marketing communications in these areas as well as creating world-class products and services.

Meeting planners, too, have generally good opinions of the area as a meeting and conference location. Good opinions, but also not necessarily great, either. 62% of planners in PGAV’s research among 50 planners in the eastern U.S. rated the destination as “Good” overall, versus only 20% who rated it as “Excellent.”



Among these same meeting planners surveyed in February 2010, the St. Augustine/Ponte Vedra area excels on quality of hotels and dining, but is relatively average in some other areas, especially lots of things to do, value and air access. Again, these may indicate inaccurate perceptions of the destination (it’s hard to believe anyone could think there is not much to do in the area) or poorly communicated brand benefits.

	Top 2 Box %	Excellent %	Good %	Average %	Fair %	Poor %	Don't Know %
Overall Opinion	82	20	62	16	2	0	0
Quality and variety of off-site dining	68	18	50	24	4	0	4
Quality hotels and lodging facilities	66	20	46	24	4	0	6
Variety of hotels and lodging facilities	64	20	44	26	6	0	4
Entertainment venues	58	14	44	28	4	0	10
Availability and quality of golf in area	58	10	48	18	2	0	22
Value for the money	56	14	42	36	2	0	6
Good place for spouses or children	50	14	36	34	2	0	14
Lots of things for attendees to do	48	18	30	42	4	0	6
Easy access by air	44	12	32	34	14	2	6
Easy driving distance for attendees	42	14	28	24	24	2	8

## Brand Strategy #6—Maintain the current destination Identity of St. Augustine and Ponte Vedra through at least 2015

The February 2009 quantitative study among a random sample of leisure travelers showed that the current brand identity—in particular, St. Augustine—has equity associated with it. St. Augustine’s unaided destination brand awareness was comparable to every other Florida destination except Orlando.

	Total (Base)	Prior SJC Visit		Kids in Household		Residence	
		Yes	No	Yes	No	Florida	Other
Unaided	(400)	(274)	(126)	(145)	(255)	(251)	(149)
	%	%	%	%	%	%	%
Net Florida	73	80	← 58	74	73	90	← 45
Orlando	33	36	← 24	38	30	43	← 16
Tampa	13	15	← 8	18	10	19	← 3
Key West	13	15	← 8	12	13	20	← 1
Miami	12	14	9	10	13	17	← 4
St. Augustine	12	15	← 6	11	12	16	← 4
Daytona Beach	11	13	← 6	11	11	14	← 5
Georgia destinations	38	36	44	38	39	23	→ 64
South Carolina destinations	20	21	19	18	21	7	→ 42
North Carolina destinations	12	9	→ 17	9	13	2	→ 27
Tennessee destinations	8	7	10	11	7	2	→ 19

While Ponte Vedra is not as well known as a Florida destination, the St. Augustine brand gains equity from its association with both Ponte Vedra and the Beaches. Ponte Vedra is known worldwide among golfers as a premier golf destination, and has a loyal following among very upscale travelers. The “Beaches” identity provides the important equity of one of the most sought-after Sunshine State destination attributes. Certainly, both Ponte Vedra and the beach destinations gain from their association with the St. Augustine identity and the awareness of its history as America’s oldest city. Much of the research performed for this project has shown that “beaches” and “history” are the two attributes most closely associated with the destination.

PGAV believes that the anniversary celebrations of the 450<sup>th</sup> (for the founding of the city of St. Augustine by Pedro Menendez de Aviles) and the 500<sup>th</sup> (for the discovery of the state of Florida by Ponce de Leon) will generate substantial publicity for the destination, and that rather than attempting to break apart the single identity, over the next five years St. Johns County’s tourism stakeholders should seek out ways for the entire county to benefit from these events and from the exposure that will result. Newly created brand names for the area (such as “First Coast”) which could replace the current identity in its entirety, as a sort of compromise, would take years to establish and may create confusion among travelers. And county names never work as destination identities—there are very few well-known county names as destinations in the United States—so “St. Johns County” is not recommended as a marketing identity.

The county’s tourism stakeholders should focus resources upon creating immersive, emotional engagement with the visitor over the next five years as a way of enhancing its brand equity. A wise time to revisit this issue would be immediately following the completion of the 450<sup>th</sup> celebration.



## **Brand Strategy #7—Use the anniversary celebrations to define the brand**

In addition to the many awareness-building opportunities that will likely be generated by the 450<sup>th</sup> and 500<sup>th</sup> anniversaries, there is also the opportunity for St. Augustine, Ponte Vedra and the Beaches to leverage the anniversaries in other ways. New destination product concepts for the county that focused upon some of the unique festive and celebratory aspects of the events tested very well in both focus group evaluations and in the quantitative studies completed in December 2009 among leisure travelers and meeting planners. The “Festive” concept, which celebrates St. Johns County’s unique history, arts, and culture, was rated highly by adults with and without children for being fun, exciting, outstanding, and for its nightlife component. While the components of this concept could be executed at any time, the opportunity to use them as focal points of the anniversary celebrations provides a powerful marketing hook.

In addition, the anniversary celebrations represent opportunities for developing and implementing legacy projects that will reshape the destination for many years to come. With the eyes of the nation and world upon St. Augustine for much of the next few years, there will be many chances to shout “new and improved” to that same worldwide audience. Many past visitors likely believe the destination hasn’t changed since they last visited; of course, in some ways that’s not necessarily a bad perception, since part of St. Augustine’s appeal is historic preservation. Of course, there are many visitors and non-visitors alike who perceive that as a barrier to visitation—that the destination hasn’t kept up with changing tastes in travelers, and remains stuck in time. The anniversaries are a chance to say to a watching and listening target audience, “We’ve changed for the better—let us show you how,” and to create a whole new generation of brand ambassadors for the area.

## **Brand Strategy #8—Leverage potential emotional connections among new and untapped audiences**

PGAV’s research indicates that African-American audiences are a largely untapped source of visitation. In the most recent research conducted among leisure travelers in the southeast and in the New York City metropolitan area, African-Americans represented 10% of all leisure travelers, but only 5% of the previous visitors to St. Johns County. While 49% of white travelers in the survey had ever visited the area previously, only 22% of African-Americans had. And African-Americans generally rated many of the new destination product concepts higher than their white counterparts.

St. Johns County has many tourism assets that appeal to African-American travelers, and possesses several sites of particular historic significance to that audience (and certainly to the nation as a whole). An effective outreach program targeting this market would generate a new audience of visitors with an emotional connection to the St. Johns County brand. The destination is ripe with potential for substantial visitor engagement with this audience.

The same is true for the Hispanic market, given the area’s ties to Spain and its Spanish influences. There is a large population of Hispanic travelers within a day’s drive of the county, and industry research shows that Florida is the third most popular destination in the U.S. for Hispanics. The household income of the Hispanic market continues to grow, and as of 2007 there were over 16 million Hispanic travelers in the U.S. representing 50 million person trips each year, according to the U.S. Travel Association. The 450<sup>th</sup> and 500<sup>th</sup> anniversaries will likely highlight many of the contributions of both Spain and Hispanics to American culture, and St. Augustine can be the epicenter of that attention.

## **Brand Strategy #9—Cross-sell other complementary visit experiences to strengthen engagement with the destination brand**

As noted previously, the six core competencies also comprise the primary visit motivations for many travelers to St. Johns County. But they do not necessarily represent the limits of engagement with the destination brand. A couple drawn to St. Johns County for the chance to take a romantic getaway, for instance, may also be attracted to the area's history, or its arts and culture. They may be interested in the culinary heritage of the region and in finding new dining opportunities.

Identifying the primary interests of the visitors to St. Augustine, Ponte Vedra and the Beaches, and then matching them with and promoting other complementary experiences that would appeal to those same visitors is a way of exposing visitors to other geographic parts of the county. It also helps build an understanding of the depth and breadth of this complex destination, and extends length of stay and increases visitor spending. But those complementary activities must be highly targeted—today's visitor will easily see past less-than-credible attempts to sell her something that doesn't fit her lifestyle, her needs, or her wants. But successful cross-selling of other destination features can increase both satisfaction with the destination and her emotional connection with the brand. It's also good business.

# Strategic Opportunities

This section of the report addresses the inherent strengths and strategic opportunities of the destination. These recommendations will create a foundation for growth and provide a “road map” for investment for the next decade.

Every destination, like any other brand, has certain attributes that potential customers associate with and find beneficial. Building on these attributes provides the most cost effective way to improve the market position. Stakeholder interviews, consultant reviews, and most importantly, consumer testing, suggest St. Johns County has six areas of strength, or “core competencies.”

The current destination identity *St. Augustine, Ponte Vedra, and the Beaches, Florida* conveys key benefits of the destination that rise above the six core competencies. A “Florida” destination connotes good weather, fun, relaxation, and outdoor activity. A Florida beach suggests warm water, wide sandy shores, and a great place for families or couples. These descriptors already differentiate the destination from others like Charleston, which are not in Florida; or Orlando, which is not on the beach.

While being a Florida beach destination distinguishes St. Johns County from many other travel destinations, it is the six core competencies—**Golf, Family, History, Arts/Culture, Romance**, and **Outdoor Recreation**—that can distinguish *St. Augustine, Ponte Vedra, and the Beaches, Florida* from other Florida beach options. The combination of these ingredients, held together by the overarching standard of authenticity, will create the unique, compelling personality of the destination.

The master plan scope indicates the plan should make strategic recommendations for golf, leisure and recreation, culture and arts, heritage, anniversaries, and public/private partnerships. The final report includes recommendations for each of these areas, but organizes around the recommended six “core competencies.” Recommendations for public/private partnerships are included as strategies in several of the core areas.





*"With miles of unspoiled beach and temperate waters year round, St. Augustine and Ponte Vedra Beach are an outdoorsman's paradise. Bring your kayak and explore the marshes of Fort Mose, spend a day of fishing in Salt Run, or take in the wildlife and flora of Anastasia State Park. Savor the calming, salty scents."*

*– [getaway4florida.com](http://getaway4florida.com)*



# Strategic Opportunities

## Core Competency #1: Outdoor Recreation

St. Johns County enjoys exceptional outdoor recreation assets. Forty-two miles of beach may top the list, but visitors can also find a wide array of ways to enjoy the scenic beauty and appealing climate of the destination, including cycling, surfing, boating, windsurfing, hiking, birding, fishing, and photography.

While many people currently enjoy these recreational opportunities, significant potential for growth exists. Research conducted for the master plan suggests a high level of interest, especially for adults or families with children old enough to participate. This report identifies the following Strategic Opportunities:

1. Make a “Big Move” regarding outdoor recreation to increase awareness. Examples include a “Destination Outfitter,” Florida Nature Center, or branded nature product like Audubon.
2. Increase promotion of unspoiled nature, especially to niche markets including international.
3. Cross-promote nature within the market through lodging partners, VICs, wayfinding trails, and other attractions.
4. Create nature interpretive guides like iPhone tours or virtual field guides .
5. Enhance existing nature access points like GTM-NERR with a more market-based guest experience approach.
6. Create/leverage events like FotoFest as nature tourism drivers for niches, such as events for experts, kids fishing events or an outdoor recreation showcase.
7. Create and/or leverage scenic trails or other designations to maximize awareness and perception.
8. Develop premium product nature experiences...up close, guided, expensive, and aspirational.
9. Promote unspoiled beaches and beach conservation programs.



### **Birding for Everyone**

*“A visit to Anastasia State Park is a beautiful way to start the day and provides abundant opportunities for bird watching. ... Expect to see great blue heron, little blue heron, tri-colored heron and green heron. snowy and great egrets...as well as the white ibis, wood stork and roseate spoonbill... gulls, sandpipers, willets, terns, pelicans and sanderlings. Late morning presents raptors like the red-shouldered hawk, bald eagle and osprey.”*

*– [getaway4florida.com](http://getaway4florida.com)*

## Outdoor Recreation Needs a Big Move to Get Noticed

The outdoor recreation assets, as good as they are, are not generally the iconic, extreme, bucket-list experiences sought by enthusiasts. This fact means that most of the recreational opportunities are achievable by average visitors to the destination. For these people, outdoor recreation is not the main motivation to visit, but a complementary experience, a way to round out a family vacation or romantic

getaway. But outdoor recreational opportunities may not be readily apparent to the average visitor to St. Augustine Beach, World Golf Village, historic St. Augustine, or most parts of the destination.

The presence of a “destination outfitter” could improve the perception of accessibility and availability to potential casual participants. Concierge-style service could equip visitors with knowledge and confidence to create a lifelong memory. Guided tours could provide safe immersion experiences and provide a premium experience opportunity. Consumer testing supports the nature concept with a significant percentage of top-box scores. The destination outfitter concept lends itself to a public-private partnership, with the county helping to start the project and private enterprise completing the task.

The St. Augustine Alligator Farm Zoological Park demonstrates how a packaged nature product can attract significant attendance compared to a collection of separate nature experiences across the county. The attraction delivers authenticity through its animal collection and historic “Old Florida” heritage. Serious nature photographers find the Alligator Farm to be an excellent place to get close to egrets, herons, storks, and many other spectacular species of birds.

The GTM-NERR emphasizes an educational approach to nature, but the name and experience will not appeal to a broad market of visitors. Enhancements to the product and market positioning could make it more psychographically accessible to more visitors. Possible product enhancements include making the whole experience more interactive and fun, both indoors and outdoors. The name GTM-NERR is not marketable, and the long version is too long. It needs a more palatable name for its identity as a visitor attraction. The facility could play a broader role in making nature and outdoor recreation accessible to visitors in the northern part of the county.



*A Florida Birding Center  
could leverage its location  
on the Atlantic Flyway*

Another way to get noticed is to develop an outdoor recreation product that “owns” a bigger image, like the Florida Nature Center. Another strategy for a bigger image is to leverage an existing brand name, like a franchise. Audubon Nature Centers work in this way to create local nature resources with a nationally recognized method. This strategy could work particularly well in SJC, since the destination is a prime birding location and has an Audubon Society Chapter in the county already. In fact, all the surrounding counties have societies, but none have visitor centers.

Marketing within the destination will be key to helping visitors get the most out of their outdoor recreation experience and associate those experiences with the destination. SJC can play a key role in this marketing by communicating opportunities through an integrated system of visitor centers, wayfinding, and thematic trails. (see section 5 Infrastructure)

Events provide another way for the county’s outdoor recreation assets to get noticed. The upcoming

# Strategic Opportunities

Florida's Birding and Fotofest is a good example of how to create awareness around the asset and attract a niche subset of people to it. An even bigger event could ignite exposure on a larger stage.

Scenic trails or other designations are another way to make a big move and get noticed. The William Bartram Scenic and Historic Highway is more than a scenic highway, it is part of a system of Florida Scenic Highways that conveys a certain status and attracts visitors with the time and interest to venture off the interstate—an ideal visitor to SJC. St. Johns River-to-the-Sea Bike Trail is another good example of a county asset tying into a bigger multi-county idea that can claim to be the biggest of its kind in the southeast United States—a big claim and big move.

Beaches are the foundation of the outdoor recreation experience in SJC and are a primary motivator for families, couples, and almost all the potential target audience segments. Investments to maintain high quality, clean, safe beaches are a requirement for success, but will not distinguish the destination from others. SJC is unique, or at least rare, among destinations that allow driving on some of its beaches around Crescent Beach. This is seen as a positive by some, but a negative by others who may perceive it as destructive to the natural environment. Environmental protection programs, funded in part by beach driving permits and managed by the county, provide a success story that can appeal to both camps.

SJC offers several opportunities for beginners and enthusiasts to enjoy fishing. St. Augustine Beach Pier and Vilano Fishing Pier have the kind of high visibility needed to appeal to broad audiences. Family fishing programs could greatly increase the number of participants.

St. Johns County has three state parks—Anastasia Island State Park, Fort Mose Historic State Park, and Faver-Dykes State Park. All three have nature trails. Faver-Dykes State Park offers a premium guided ranger-narrated wildlife walk along a canoe trail. Limited capacity programs like this can be used to illustrate unique, special nature opportunities within the destination. Anastasia is a jewel, with 1,600 acres, four miles of pristine beaches, coquina archeological site, camping, and marshes.

## **St. Augustine Eco Tours...**

Trip Advisor #1 pick (out of 82) in St. Augustine

*We got way more than we expected in terms of scenery, wildlife, and knowledgeable commentary (yes, Zach is totally obsessed with dolphins...ask him ANYTHING). We were also welcome to bring our brown lab, Sally, along for the ride, and Zach was great with her as well as super hospitable with us. He shared lots on the history of St. Augustine, natural and cultural, and gave us tips of other attractions to visit (and NOT to visit). Thumbs up!!*

*— Juliet from British Colombia*







*Research by US Travel Association indicates women make 7 out of 10 leisure travel decisions.*

*For families, that means Mom. Moms tend to plan trips that meet the needs of all family members. She needs to know her family will be excited by the destination. She needs to be able to imagine each of them participating in activities.*



# Strategic Opportunities

## Core Competency #2: Family

Appealing climate, safe environment, affordable lodging, sandy beaches, and an abundance of outdoor recreation make SJC seem like an ideal destination for families. Research conducted for this project confirms it, with 84% of participants in the inquirer survey rating the destination good or excellent for families. Yet the research also indicates how people believe the destination lacks in activities for families and children. This report identifies the following Strategic Opportunities:

1. Own the authentic family destination category, where families visit to discover their past, share the present, and create traditions for the future.
2. Add an interactive aquarium that interprets the regional aquatic environment and marine life (not dolphins...covered by Marineland).
3. Embrace Marineland as a SJC attraction.
4. Develop the area around SJC Pier (St. Augustine Beach) as a family dining, shopping, entertainment, and education attraction, with SJC as the public catalyst to entice private investment.
5. Promote SJC as a family reunion destination.



## Own the Authentic Family Destination Category

Fort Myers Beach – voted “Best Family-Friendly Beach in the Southeast U.S.” by Family Fun magazine. Accolades like these help a destination stand out in a competitive environment. To earn the accolades, destinations can make incremental improvements to the product and conduct a strategic PR campaign to get noticed.

Tourism industry leaders in public and private aspects of the tourism industry have an opportunity to reshape *St. Augustine, Ponte Vedra, and the Beaches, Florida* from a good family destination into a stand-out one. To achieve this goal, the destination will need to excel in its attractions, infrastructure, lodging, and marketing.

## Attractions

The beaches and outdoor recreation opportunities provide a good foundation of attractions for SJC as a family destination. **But the destination needs more things for families to do—attractions and activities that appeal to families but stay true to the brand of authenticity.**

Several area attractions meet this standard. The St. Augustine Alligator Farm offers an experience for the whole family with up-close animal encounters and an authentic historic St. Augustine story, attracting over 200,000 visitors per year. The St. Augustine Lighthouse and Museum attracts 180,000 visitors each year with an authentic, unique experience and iconic views. The Lightner Museum combines a rare collection of Victorian objects with an architectural masterpiece into another unique, authentic destination—albeit appropriate for families with older children. It attracts over 100,000 people per year. These examples illustrate how good products can sustain admirable levels of success.

As good as they are, even these attractions would not motivate most visitors to the destination. New attractions that meet the unique authentic standards will add to a “critical mass” of things for families to do in the area. New attractions also make an important brand statement—that this destination is dynamic, has something new; a reason to return...a concept critical to a destination like SJC that relies on repeat visitation.

PGAV developed and tested several concepts to measure the attitude of potential visitors toward family-based products. The generally high scores (80% selected extremely or very appealing) suggest potential visitors would see products like the ones tested as important additions to the destination. All were viewed as highly interactive. The hands-on aquarium tested especially high at 85%, including 54% extremely appealing. The general appeal of aquarium located within a beach destination was also seen as a natural fit. Participants favored all the concepts they perceived as “fitting,” another way of saying “authentic.” From the attraction concepts tested, we can extrapolate the thinking to other ideas in the future. For example, the county’s history with railroads might suggest a working rail tour.

# Strategic Opportunities

## Developing Family Product at St. Augustine Beach

Just as beaches are a critical asset in attracting families, fishing piers are a fundamental part of a beach experience. Piers have a powerful ability to attract people by amplifying the emotional connection we have with large bodies of water. St. Augustine Beach has the only pier in the county that extends into the Atlantic Ocean. Not only is it a great place to fish, but it serves as an anchor attraction for the area.

In an attraction model like a theme park, operators use popular attraction elements like a roller coaster to draw guests to different areas within the park, exposing them to food and retail opportunities along the way. The pier attracts visitors, and provides an ideal location to develop shopping, dining, and other complementary attraction products.

The pier area lends itself to a public-private partnership, since SJC owns the pier and much of the land around it. SJC could develop a master plan and provide infrastructure and vision to encourage high quality private investment. The area around the City Pier on Anna Maria Island provides a good example of a much higher quality shopping and dining development than is typically associated with piers. Yet this example is modest compared to the potential for St. Augustine, which could include not only shopping and dining, but attractions like the aquarium that tested so well in the research, a children's museum, a performing arts venue, and even lodging in the area nearby.

The pier development could be the defining brand icon for St. Augustine beach as a high quality family destination. A carefully crafted plan leverages its position as a sensitively developed commercial, residential, and entertainment center located at the center of pristine beaches. Its style can remain casual and family friendly, but the price point of lodging can increase as the community improves its perceived value.

The existing lodging spectrum offers primarily affordable lodging, with higher price points mostly in condos. St. Augustine Beach has a rare asset...a beach in Florida not lined with high rise hotels. Investors build high rise/dense developments to get the most revenue per square foot. Increasing density is only one approach. Owners can increase revenue per square foot by increasing price point. The undeveloped nature of SAB is its competitive advantage. Increased price point is the highest and best use of the relatively undeveloped asset from a real estate point of view. Enhancing the brand will allow the community to gradually replace older properties with newer, higher price point options. The overall brand and image will improve with increase price points, but will also require infrastructure and amenity improvements...streetscape, signage, higher standard on development, better retail and restaurants.

City of St. Augustine could use more family lodging options. Families stay at the beach during the summer, but stay in city during shoulder seasons. Students on their 4<sup>th</sup> grade field trip visit the historic district and entice their parents to return.



### **More information about activities**

would have the most widespread impact on encouraging future visits, especially among people who have never visited, those with kids in the household, and those who live in neighboring states.





**Research Finding:**

For those who have never visited the area, it is cultural events/festivals, unique attractions/ experiences and shopping for local arts and crafts that index relatively high on importance but on which the county underperforms. Since “performance” among these respondents is actually their perception of how well the county delivers, this suggests providing more information and examples of these activities in advertising, promotional materials and all other marketing communications about the area.



# Strategic Opportunities

## Core Competency #3: Arts and Culture

St. Johns County can boast a thriving arts and culture scene. Much of the arts activity centers on St. Augustine, but Ponte Vedra, St. Augustine Beach, and other parts of the county enjoy their share as well. According to a web site that promotes St. Augustine, the arts/culture scene is thriving.

It's no surprise that an art and culture community formed long ago and continues today. Creative people are drawn to areas that provide inspiration. St. Johns County offers abundance, with centuries of cultural history and stories, rich historic architecture, and natural scenic beauty. Combine this with a steady influx of tourists/potential arts consumers, and you have a formula for success.

Despite these strengths, however, the image of the destination is not centered on arts. Beaches, history, nature, appealing weather, and golf come to mind first, especially for people who have not yet visited. Research conducted for this project suggests most people rate arts and culture as an important attribute, but do not perceive arts as strength of the destination. Given this perception, this report identifies the following Strategic Opportunities:

1. Create a county wide, multi-week, annual event to improve the arts infrastructure and increase awareness
2. Create/reinforce cultural districts over stand-alone cultural facilities
3. Add a civic performing arts center in St. Augustine to complement the Flagler College Auditorium
4. Identify and promote a signature arts style (New Orleans has many types of music but is most associated with jazz)
5. Eliminate any downtown ordinances that might hamper cultural arts development, such as length of performances, inability to showcase artists at work, spontaneous performances, etc.
6. Incubate artists and use their presence as a neighborhood economic engine
7. Promote better communication among arts groups within the destination
8. Develop sister city arts groups to promote cultural exchange and awareness
9. Need follow-up evaluation of events to assess economic impact, especially those that could drive overnight visitation
10. Create a facility to present and sell regional juried crafts
11. Create an Aspen-style county-wide food and wine festival

In his book *Rise of the Creative Class*, Richard Florida describes what communities can do to attract this group of people as residents and workers. **The creative class becomes a tourism asset, because they support the arts, restaurants, nightlife, and nature activities; generally adding a layer of youth and**

**energy to a community that helps keep it vibrant.** The destination has many of the attributes required by the creative class. The next step is to look at policies and the image you chose to project to make sure that the county and individual governments within the county project an open, inclusive, welcoming attitude.

Arts tend to thrive in districts, both for the artists and the patrons. Most people like to visit multiple art galleries, not just one. The ARGOSA organization recognizes this and plan regular art walks. These patrons may also make a full evening out of it by having dinner, shopping, or seeing a live performance. The summer performance series at St. Augustine Beach leverages the proximity to the pier, another type of pedestrian friendly environment that encourages social interaction. The new performing arts center in Ponte Vedra promises to make arts much more accessible in the northern part of the county. The community has an opportunity to enhance the success of the venue by exploring ways to create complementary development around it.

Several communities have used arts and culture as tools for economic development. Chattanooga reinvented its downtown and continues to infuse energy in part with an initiative called CreateHere. Paducah, KY transformed their downtown with a redevelopment plan with arts at the center. Sedalia, MO helped coordinate low interest loans for artists to renovated buildings for studios and galleries. Asheville, NC did the same with the River Arts District. St. Charles, MO enhanced their historic downtown by converting an old industrial building into a gallery, studio, and special event space. The University of Florida initiative to preserve historic building in St. Augustine may provide opportunities for similar kinds of programs.

For the most part, arts in this destination are more of a tourism “satisfier” rather than a “motivator.” Notable exceptions include large events and the St. Augustine Amphitheater, which attracts significant numbers of visitors from outside the county. A more concerted effort could convert more of these visitors to lodging customers. A large multiday event like the Gamble Rogers Folk Festival can generate significant lodging business.

The upcoming anniversaries provide another major opportunity for arts to help drive tourism. Anniversary planning includes Romanza, a multi-week/multi-venue arts event modeled after Spoleto could create sufficient critical mass and attract sufficient attention in the media to make real impact. SJC county should embrace the anniversaries, in particular Romanza, as a county-wide opportunity and look for ways to support it through new venues, wayfinding, promotion, and cooperative planning. The county may need to undertake a separate study specifically to look at creating the right mix of venues to meet the needs of the anniversaries and remain sustainable beyond 2015.

# Strategic Opportunities

## Excerpts from the *Rise of the Creative Class* by Richard Florida

*“Stuck in old paradigms of economic development, cities like Buffalo, New Orleans, and Louisville struggled in the 1980s and 1990s to become the next “Silicon Somewhere” by building generic high-tech office parks or subsidizing professional sports teams. Yet they lost members of the creative class, and their economic dynamism, to places like Austin, Boston, Washington, D.C. and Seattle—places more tolerant, diverse, and open to creativity.*

*The most highly valued options [to the creative class] were experiential ones—interesting music venues, neighborhood art galleries, performance spaces, and theaters. A vibrant, varied nightlife was viewed by many as another signal that a city “gets it,” even by those who infrequently partake in nightlife.*

*More than anything, the creative class craves real experiences in the real world. They favor active, participatory recreation over passive, institutionalized forms. They prefer indigenous street-level culture—a teeming blend of cafes, sidewalk musicians, and small galleries and bistros, where it is hard to draw the line between performers and spectators. They crave stimulation, not escape.*

*Creative class people value active outdoor recreation very highly. They are drawn to places and communities where many outdoor activities are prevalent—both because they enjoy these activities and because their presence is seen as a signal that the place is amenable to the broader creative lifestyle.*

*For cities and regions to attract these groups, they need to develop the kinds of people climates that appeal to them and meet their needs.”*



*The St. Augustine art scene is always bustling. The city hosts tons of live music and is home to theater and film organizations, as well as dozens of art galleries and the first Friday Art Walk. Flagler College frequently hosts gallery openings, welcoming the public in to see work exhibited by the fine art students. The area has a very wide and varied music scene. Many kinds of music can be heard live here. From country and western to rhythm and blues to jazz, rock, folk, bluegrass, classical, you name it, it's here. Live bands can be heard at numerous venues dotted around downtown St. Augustine and Anastasia Island. Enjoy an exciting evening out by combining delicious outdoor dining with live music. Choose from full service restaurants to quaint little cafes in the historic district. You can also hear live music in the various clubs and nightspots located on the Intracoastal Waterway. [www.oldcity.com](http://www.oldcity.com)*

### **Identify a signature arts and cultural core competency**

St. Johns County has a strong arts and culture community. With a diversity of artistic expression and a wealth of talent within the county, the tourism industry benefits from its presence. The arts and culture offerings provide activity for the tourist; generate overnight stays; enhance the historic ambience of the county; and produce incremental tax revenue for the county and its municipalities.

But one thing that St. Johns County lacks is a perceived “signature” style of art and performance. The county is not necessarily known for anything in particular that it does better than anyone else in its competitive set. There is no point of differentiation, no unique selling proposition that expresses an ownership of a St. Johns County “style.” The county does lots of things right in arts and culture, but without a unique selling proposition it’s difficult to be known for something and say it with credibility in the marketplace.

For example, Charleston, South Carolina is home to the Southeast Wildlife Exhibition, an annual event that attracts over 35,000 attendees each February. The event is the largest of its kind in the nation, and a driver of hotel room nights during an otherwise slow time of year. But Charleston is far from being known only as a center for wildlife art. The event serves as a world class signature event that helps support the city’s reputation as a premier destination for many types of artistic expression.

In St. Johns County, we believe that live performances can be that “signature” style of expression or art form, for these reasons:

- The county already has credibility established in this segment of the arts and culture category, with numerous live performance venues in both the public and private sector, and substantial expertise in hosting live events of many kinds.
- There are several venues countywide that can accommodate live performances, including the St. Augustine Amphitheater, the new Ponte Vedra Concert Hall, Limelight Theater, EMMA Concert Association, Flagler College, the county fairgrounds, Francis Field, several other parks and outdoor facilities, and a number of other private performance venues. In addition to providing a desirable critical mass of venues, the facilities also promote the potential of cross-county visitation.
- Live performances are ideally suited to driving overnight visitation, because they usually occur in the evening hours. They also fill an oft-cited need of many destination visitors for activity at night.

A marketing emphasis upon live performances does not preclude the further growth and promotion of other components of the arts and culture community in St. Johns County. Indeed, the framework is now in place to encourage this growth as a driver of visitation. But the marketing of the area’s arts and culture could be even stronger if the county can establish a leadership claim in an area of expertise, and the region’s best and most ready-for-market opportunity is in live performances.



# Strategic Opportunities

## Core Competency #4: History

*St. Augustine, Ponte Vedra, and the Beaches, Florida* stands apart from other destinations and other Florida beach destinations in large part because of history. No other destination can make its claim. Not only does it have the history, but it has preserved and protected much of its architectural evidence—the physical connection to the past.

In 2009, PGAV Destinations commissioned a study on Authenticity that includes several key findings relevant to *St. Augustine, Ponte Vedra, and the Beaches, Florida*, particularly to the history dimension of its brand. First, authenticity matters—it makes people more likely to visit. Second, history is one of the main characteristics that convey authenticity. Third, people hold museums and similar organizations to a higher standard for authenticity than other kinds of attractions. In other words, people don't mind if Disney takes liberties with the facts, but they expect the Smithsonian to get it right. This relates closely to another industry study that ranks museums among the most trusted of public institutions.

PGAV has cautioned destination tourism leaders about the dangers of tackiness or any perception of being a tourist trap. We want to reiterate that warning in this document. Because of the expectations that go with the destination's authenticity, people will react strongly and negatively to what they perceive as a breach of trust.

As important as it is to maintain and protect authentic history, history needs to be told in compelling and entertaining ways. It needs to reach people on an emotional, personal level. It needs to be packaged in a way that stands out in a highly competitive world.



### Research Findings:

Among both Contestants and Inquirers, history and beaches are the most frequently mentioned associations for St. Augustine/Ponte Vedra. As would be expected, people who have visited the area have a somewhat more diverse impression, citing a slightly broader range of images.



*Old World majesty, the quiet strength of a mighty fortress, the promise of a new life free from tyranny and oppression...Those who visit Old City will absorb centuries of colorful adventure. From the coquina stone walls of the Castillo to the lush grounds of Fort Mose, every door, every corner of Old City reveals a story. Come to St. Augustine and create a new one to tell.*



# Strategic Opportunities

This report identifies the following Strategic Opportunities:

1. Develop a major cultural history museum/attraction as the primary storyteller of the destination and with state-of-the-art production quality.
2. Leverage the anniversary events as world's fair scale celebration and a critical opportunity to build awareness and reshape the brand.
3. Develop the area around Matanzas Bay to make it pedestrian friendly and transform the waterfront into an attraction.
4. Enhance Fort Mose as an attraction with expanded exhibits, event pavilions, small amphitheatre, and interpretive staffing.
5. Promote African American history as an important part of the overall history of the destination.
6. Develop a self-guided history interpretive product—printed, podcast, and/or iPhone—with a selection of programs including African American history, civil rights, Underground Railroad, Spanish Colonial history, British Colonial history, or Native American history as examples.
7. Promote the anniversaries and destination as a Spanish heritage pilgrimage.
8. Promote the importance of SJC as the birthplace of the Roman Catholic church in the new world and develop interpretive programs and guides.
9. Guard the authentic history brand by educating all stakeholders about its importance.
10. Invest in more live interpretation in the historic district, but require high standards of authenticity and quality.



## **Develop a Major Cultural History Museum/Attraction**

Many separate organizations and venues currently tell the history of the destination. None of them could be described as world class. The Castillo de San Marcos is a world class artifact and has high quality live interpretation and demonstrations, but the historic structure has inherent limits of storytelling methods. The story of the fort is also not the only story to tell.

The state of Illinois had a similar issue with numerous Abraham Lincoln sites scattered around Springfield, none attracting large numbers of visitors. The State built a new Abraham Lincoln Museum with state-of-the-art exhibits and theatres. The investment generated considerable media attention and attracts 600,000 people per year according to the 2010 Museum Directory.

A major museum could use state-of-the-art technology and presentation techniques, such as 3D technology or interactive immersion media, to create a powerful storytelling experience. Research conducted for this project reflected high scores for a historic large format destination film, a live actor/multimedia storytelling show, and a well-crafted exhibit about a compelling subject like real life pirates. The destination film could be produced by National Geographic or the History Channel to establish immediate credibility. It can be called something other than a museum, but it should reflect the attributes that illicit trust.

In addition to developing a major history attraction, several strategic opportunities warrant consideration.

**Research Findings:**

*Museum is interesting, appealing to children and adults, unique, high quality and outstanding. Importantly, its performance scores on all but three attributes place it above average. (70% rated it extremely or very appealing)*

**Anniversaries of 2013 and 2015**

The anniversaries provide a rare opportunity to add drama to the history and a sense of urgency to attend. Lack of urgency is a common problem with museums, “it will be the same next year as it is now.” Shows, events, and even special exhibits at museums are fleeting and inspire action.

A major event like the arrival of Spanish Royal Family only happens once and can motivate visitation or at least generate media attention. Other events, like a sail-in of a Spanish Galleon and other tall ships of the world can also generate media attention.

The anniversaries should generate legacy projects—performance or arts venues needed for the event that can serve the community and tourism needs long after the anniversaries. Romanza promises to bring major entertainment for 2013-2015 and could justify these investments. Matanzas Bay, around the newly completed Bridge of Lions, could make an ideal venue for fireworks, sail-ins, and other extravaganzas. Improvements to the land areas immediately around the edges of the bay on both sides could be used during the daytime during the events to leverage the waterfront experience and create a lasting presence—essentially a new attraction.

**Spanish American History**

The Spanish heritage in the destination has a strong foundation of product and is the most obvious to a visitor today. The anniversary events, museum, and self-guided products will enhance the existing experience and make it more marketable.

The Hispanic market represents a large potential market and area of growth potential for SJC, including a large population in Florida. Promotion should emphasize St. Augustine’s role as the birthplace of it all and the trailhead of Florida’s Spanish Trail. Leverage the name Spanish Quarter to evoke an essence similar to New Orleans.

**African American History**

Create opportunities to reach niche audiences with products and programs for African-Americans. African-Americans generally responded more positively than the whole to the concepts tested, yet were under-represented in having visited, suggesting a potential new audience.

Invest in Fort Mose as the icon for African-American History. Investments could include an expansion of the visitor center, development of state-of-the-art exhibits, and recreational infrastructure such as pavilions to encourage family reunions on the site, which generates direct revenue and via lodging. SJC could also explore changing Fort Mose from a state park to a national park like its counterparts. This move alone would convey status and generate a base level of marketing, as it would be listed on the NPS national web site. A small amphitheatre could be created for school group classrooms, entertainment for events, or historic dramas, like James Bullock’s *Freedom Road*.

SJC also has significant civil rights history involving Dr. Martin Luther King, Jr. and other leaders. A trail, iPhone tour, or other products could interpret this more modern history.

**Religion/Worship**

Create opportunities to reach niche audiences with products and programs for Roman Catholics. Many historic landmarks of religious significance are in the area, including Mission of Nombre de Dios, America’s first mission Great Cross; bronze statue of celebrant of first mass; small chapel Our Lady of La Leche, and the Cathedral-Basilica.



# Strategic Opportunities

## Maritime History

SJC has a rich and interesting maritime history, which is currently best represented by the ongoing effort to develop a National Heritage Area for the “Nation’s Oldest Port.” This effort is being led by an energetic group of SJC residents and several key cultural attractions, including the St. Augustine Lighthouse and Museum, the Guana Tolomato Matanzas National Estuarine Research Reserve, the Friends of A1A Scenic and Historical Coastal Byway, and the Lighthouse Archeological Maritime Program. This Working Group is currently following the public advocacy, feasibility, and review process required to establish this Heritage Area via the US Congress.

The establishment of the Nation’s Oldest Port National Heritage Area will celebrate themes such as Spanish, British, African American, Minorcan, and Native American heritages. The Heritage Area could bring potential benefits to SJC tourism, including:

- Up to \$10 Million in 50-percent match funding over a period of 15 years through the National Park Service.
- Cross-promotion with the area’s lodging properties.
- Increased recognition of the unique historical character of SJC.
- A context to promote the region’s unique traditional foods, crafts, and cultural festivals.

We strongly recommend that SJC support the development of the Nation’s Oldest Port National Heritage Area.

## Agricultural History

Develop a self guided tour of the agricultural history of SJC.

## Create targeted destination marketing for the African-American and Hispanic audiences

The marketing research performed during this project shows that African-American visitors are under-represented as a part of the visitor mix to St. Johns County. In one part of the research that was executed among random leisure travelers in the southeastern U.S. and in the New York City metropolitan area, African-Americans represented 10% of the overall leisure traveler sample but only 5% of the previous visitors to St. Johns County within the sample. Furthermore, 49% of white travelers surveyed in the study had ever visited the destination, but only 22% of their African-American counterparts had.

One of the most interesting observations made from the research is that the African-American travelers were far more interested than white travelers in some of the kinds of activities that St. Johns County already offers: regional dining, fine dining, music and performers, fun things for kids, and nightlife. And when exposed to the new destination product concepts in the research, African-American travelers scored almost all of them in far higher numbers than white travelers. (The only concept that did not, the “Museum” concept, received statistically equivalent scores.)



St. Johns County already has a substantial base of appeal for African-American travelers. Fort Mose and St. Augustine's role in American civil rights history are highly significant historic assets. The county has core competencies in several destination attributes that are very appealing to African-American travelers, and the new product concepts tested in the consumer research can only add to that appeal. And the destination lies in close driving proximity to several markets with large numbers of educated African-American travelers, particularly Atlanta.



But appealing to the African-American audience requires a highly targeted approach, and the market is becoming quite competitive. Effective and mutually beneficial partnerships will also be critical to promoting the destination to the audience. These should include efforts among hoteliers, attractions, the VCB, the St. Johns Cultural Council, the city of St. Augustine's Heritage Tourism department, the 40<sup>th</sup> ACCORD group, and even other non-St. Johns County commercial tourism entities such as airlines that are eager to reach this audience.

There are also opportunities for product enhancement to reach this audience. Obviously, expansion of the Fort Mose site is critical to improving its interpretation of the Fort Mose story, but there are also opportunities for improving visitor amenities at this site to attract more African-American family reunions. This segment of the

leisure traveler market is extremely important in the African-American community, and providing more restrooms, parking, and pavilions to host these gatherings at a culturally significant site such as Fort Mose is an important part of the destination's ability to attract the market.

Some of the same can be said for the Hispanic traveler market. In a research report published in 2008, the Travel Industry Association of America (now the U.S. Travel Association) showed that while Hispanic travelers take fewer leisure trips per year than the general leisure traveler population, they spend more nights away from home and are less likely to fly to their destination (which is good news for destinations like St. Johns County which depends more upon leisure travelers arriving by car). They are also much more likely than the general population to travel with children under the age of 18, also making them appealing as a target audience for the county. And Florida was cited as the third most popular state for Hispanic travel, behind only California and Texas. TIA noted that acculturated Hispanics are likely the best target within the larger Hispanic market, due to their higher levels of income and the ability to reach them through mainstream media.

The upcoming 450<sup>th</sup> and 500<sup>th</sup> anniversaries are excellent opportunities for reaching out to this audience and creating programming, product and communications that establish and strengthen the ties between St. Augustine and the Hispanic market.

# Strategic Opportunities

St. Johns County, and particularly St. Augustine, possesses a number of attributes that could be appealing to the Hispanic traveler. Its strong ties to Spain and the city's location at the center of Spanish history in North America are foremost in this potential appeal, but there are other destination attributes that are important to this audience:

- Close driving distance to large Hispanic urban population centers
- A location which can leverage the appeal of other tourism entities driving Hispanic travelers past St. Johns County's front door on Interstate 95 on their way to other leisure destinations or visiting friends and relatives
- A wide variety of accommodations capable of hosting Hispanic family gatherings (also very important to this market)

## **Churches and religious affinity groups are an untapped source of visitation**

St. Johns County has a number of important religious landmarks, some of which are of national significance. And the upcoming 450<sup>th</sup> and 500<sup>th</sup> anniversaries are likely to draw even more attention to landmarks such as the Basilica in St. Augustine--the oldest Catholic parish in America--and events such as the first Catholic mass celebrated upon Menendez' landing. While the role of religion in Florida's history has been cited as a negative influence upon the region by some, there are probably as many people who view it as a positive or who are fascinated by its undeniable influence upon the history of America.

For good or for bad, the historic role of religion in North America extends north to Jacksonville and Fort Carolina National Memorial, which can also be incorporated into religious-themed tour itineraries. And the county's abundance of mid-price hotels may be of particular appeal to this market.

Leveraging the 500 years of religious history in the county, the city of St. Augustine's many attractions of both religious and historic significance, and the celebrations of the 450<sup>th</sup> and 500<sup>th</sup> anniversaries is a rare opportunity to establish a market leadership position in a rapidly growing segment of the industry. This growth extends to several components of the industry: tour operators, church group daytrippers, and religious conferences. The World Religious Travel Association estimates that the size of the worldwide market is \$18 billion and that 300 million people travel for faith-based reasons each year. The U.S. Travel Association observed in 2006 that one-quarter of travelers expressed an interest in taking a spiritual trip or pilgrimage.

The VCB has done some work in this area, with attendance at trade shows targeting religious conferences. The promise of the next five years and beyond, however, demonstrates that there is a need for an even-greater focus upon religious-themed travel in both product and in marketing and sales. There are obviously challenges associated with the development of any religious-themed "product," even as simple as a thematic trail or content on a destination website. There are limits as to what a publicly funded body such as the TDC or VCB can do in this market. One way to accomplish this may be to encourage an organization such as the local Catholic diocese to develop content around the 450<sup>th</sup> anniversary, and use their networking capabilities to encourage visitation from other dioceses around the country.



Weddings in St. Augustine are magical. In this hauntingly romantic city, there are many venues for your ceremony and your celebration... under a blanket of stars, in a Victorian home or at a luxury hotel – just use your imagination.

All of our bed and breakfasts are rated among the most romantic; you need only flip through the guest books of Casa de Solana, Casablanca Inn and others to learn why. Latigo Yacht Charters is a B&B at sea, offering intimate weddings and romantic escapes. The lavish Casa Monica Hotel can accommodate large groups in grand style, and the Hilton St. Augustine Historic Bayfront offers unsurpassed luxury as well.

A quiet church or ornate cathedral in the Old City presents a divine start to your new life. Afterwards, hitch your “Just Married” sign to a horse-drawn buggy from St. Augustine Transfer Company. Pause for a kiss under the Tree of Love, and your union will be sealed for eternity.

Lovers need look no further... St. Augustine, Ponte Vedra and the Beaches is dripping with romance. Saunter hand-in-hand down centuries-old streets; ride horses along the ocean’s edge, take sunset sails and moonlit strolls. Savor creamy chocolates after a gourmet candlelit meal. Cuisine is as inspired as art and culture, and naturally, history speaks for itself. Come. Create some of your own.





## Core Competency #5: Romance

*St. Augustine, Ponte Vedra, and the Beaches, Florida* have all the right ingredients for romantic getaways, including unspoiled beaches, unique shopping, nightlife, wide variety of dining, spas, and lodging for all tastes, from resorts to small inns/B&Bs. Building on this strong foundation, this report identifies the following Strategic Opportunities:

1. Protect the romantic brand.
2. Promote the destination wedding business.

### **Destination weddings can be an even larger part of the visitation mix in St. Johns County**

The destination wedding market is already an important segment of the visitor population in St. Johns County. The county's rich mix of accommodation types, wedding and reception venues, scenic beaches, relatively easy accessibility, and romantic ambience contribute to the popularity of the county as a destination wedding location. But this market has also become brutally competitive in recent years as many destinations seek to replace hotel room sales that have been lost during the recession. And competitive destinations such as Savannah and Charleston are moving to capture an even larger share of this business.

In Savannah, almost 40 percent of the county's wedding licenses are issued to out-of-state addresses (and that figure obviously doesn't include licenses issued to residents of Atlanta, one of their largest markets). The Savannah CVB is currently establishing a destination weddings website dedicated solely to attracting brides to the city (as a number of destinations have already done).

In fact, it is now estimated by The Wedding Report (an industry research firm) that 12 percent of all weddings (259,200) in the United States in 2008 were destination weddings (up 400% in the last decade). These weddings accounted for \$2.49 billion in total spending. Florida is considered by the Wedding Report as the second most popular location for destination weddings, behind only the Caribbean, and they involved an average of 74 guests per wedding.

The popularity of destination weddings also creates and supports many small businesses that cater to the destination wedding market in some of the more popular wedding locations. One private wedding officiant in St. Augustine who was interviewed as part of this project noted that 95% of his business comes from outside the area, and that 50% of it is from outside Florida.

St. Johns County can do more to leverage the popularity of destination weddings. The Wedding Report notes that 74% of destination wedding couples are likely to use Internet search engines as a source of destination planning information, and 47% are likely to use Facebook to share details of the wedding with friends and family. Yet this medium is all but ignored by the VCB on its website. The VCB does some advertising to this market, but given the importance of this segment, it is worthy of a much greater presence online and in targeted communications.

There has been some discussion among stakeholders interviewed during this project that the county may invest in creating wedding venues at the St. Augustine Beach pier and at Fiddler's Green in Vilano Beach. While either of these sites would make excellent facilities for weddings and other social functions, there is some justifiable concern about competition with the private sector and the large number of existing venues in the county. The county should first invest resources in promotion of its existing destination attributes and benefits for destination weddings in order to grow its share of the market before creating major new facilities to serve this audience.

*Known as the world center of golf, the area's legendary courses and venues combine great opportunities for recreation with actual facilities for getting down to serious business. The Clubhouse at TPC Sawgrass offers an additional 13,000 square feet of function space with inspiring views of the famous TPC Stadium Course, home of the PGA TOUR and THE PLAYERS Championship. The World Golf Hall of Fame is home to the King & Bear, the only course ever co-designed by Jack Nicklaus and Arnold Palmer - as well as the St. Johns County Convention Center and adjoining Renaissance Resort at The World Golf Hall of Fame. Just imagine: meetings in the morning and challenging golf in the afternoon, followed by an evening reception in the Hall of Fame's tower!*



## **Golf Datatech, L.L.C.**

### **2006 Serious Golfer Travel and Resort Study**

- 89% of respondents were male (yet 70% of leisure travel decisions are made by women)
- 68% of respondents took a golf specific vacation in the previous year
- 67% indicated the plan to take a golf specific vacation in the next two years
- 69% travel with friends/41% travel with spouses/significant other
- Able to chose multiple options, 41% picked going to the beach as the top golf trip activity. 39% picked general sightseeing and 33% picked gambling
- 16% of respondents indicated they would pick Florida for a golf vacation, second behind South Carolina (21%)
- Within Florida, 30% of respondents picked Orlando, while 10% picked Jacksonville (which *may* include Ponte Vedra...neither PV or St. Augustine were on the list)
- 89% indicated they would use the internet to plan a golf specific vacation, 61% said word of mouth, and 49% use magazine editorial
- 44% of serious golfers prefer a full resort lodging
- Quality of golf and geography (climate, scenic beauty) rank as top general resort characteristics
- 75% play with friends, while 29% play with spouse and 29% with family
- Respondents in the Northeast prefer the Carolinas or Florida for golf vacations

# Strategic Opportunities

## Core Competency #6: Golf

St. Johns County has an abundance of exceptional golf courses, including several “trophy experiences.” The Players Championship creates prestige and awareness to players and fans of professional golf. The PGA headquarters and World Golf Hall of Fame add further evidence to the claim that St. Johns County is the world center of golf. Warmer than Myrtle Beach in the winter and cooler than much of Florida in the summer, SJC county can offer its golf product year round. Many courses are public. Of the six core competencies, only golf can truly be described as world class.

Yet golf still faces major challenges. Only about 10% of the general population plays golf. Much of the golf business in SJC comes from groups, a category which is down in the current economic climate. Florida, especially NE Florida, does not top the charts of serious golfers nationally. But many of these golfers want low cost boy’s golf weekends where they stay in low-medium cost condos and experience little of the total destination. If you look beyond this group, a significant market exists in golf vacationers that would find SJC to be an ideal destination. This report includes the following strategic opportunities.

1. Focus on promotions and packages. The destination already has capacity and high quality product.
2. Target the golf vacationer (leisure) that plays with family/spouses and values the full resort benefits and scenic beauty. This group will spend more and experience more of the destination.
3. Add more group sales staff to sell the destination.
4. Make THE PLAYERS Championship more of a county-wide event.
5. Create a Golf Technology showcase event.
6. Create a golf trail to convey more “critical mass.”
7. Make golf feel younger, and thereby more appealing and accessible for Baby Boomers, Gen X players, women, or non-traditional golfers through branding, packages, and facility improvements, like a technology overlay to test the golf course of the future.
8. Create and promote an environmentally friendly golf course (or modify an underutilized one).
9. Make public clubhouses more visitor-friendly for general visitors with a presence of destination information and cross promotion.







# Infrastructure Strategy

Many elements are required to create a great tourism destination. A destination must have things to do, or products, that will attract visitors. It must have lodging that appeals to the types of visitors who seek to come to the destination. It must have effective branding, marketing, and promotion. It must have an effective workforce to provide the services associated with lodging, products, and other tourism-related businesses. And, importantly, a destination must have an effective infrastructure.

Tourism infrastructure can be defined as the physical linkages that help visitors connect, physically, emotionally, and intellectually, with the destination. We think of this as links on a chain, each one interdependent on the other. An effective infrastructure provides a seamless “flow” from arrival, to orientation, to immersion, and finally enjoyment.

## Visitor’s Hierarchy of Needs

In 1943 Abraham Maslow published his seminal paper: “A Theory of Human Motivation.” In this document, he introduced his concept of the Hierarchy of Needs. This hierarchy is often portrayed in the shape of a pyramid. At the base of the pyramid are the most basic needs, such as physiological needs and safety. As the pyramid builds upward, each ascending tier becomes more tied to emotional, social, and spiritual needs. At the top is Self-Actualization – the ability of a person to reach their full potential. The key to Maslow’s concept is the idea that each tier must build on the tiers below – if you are hungry or fear for your safety, you are very unlikely to reach your full potential.



In destinations, we find a similar hierarchy of needs concept. At the base of the pyramid, visitors must feel safe, find their way easily, and feel welcome. Progressing upward on the pyramid are stages of enjoyment, enrichment, escape, social engagement, and finally transformation – the ability of a destination experience to change the visitor in some way. All effective destination experiences aspire to transform their visitor by contributing to their overall life experience.

Infrastructure plays a key role in supporting this visitor hierarchy of needs. It combines the critical elements that contribute to a quality experience. These elements are described in the following section.

## Infrastructure Element #1 – Wayfinding

Effective wayfinding is far more than signage. It is an efficient communication of direction, opportunity, and branding. It guides visitors along their experience, and gives them the confidence that they are “on the right path”, and avoids the frustration that comes from a concern that the visitor’s precious leisure time is being wasted. Furthermore, effective wayfinding promotes the special qualities of geography that make up a destination’s character. Significant geographic features such as coast lines and architectural landmarks are often the most intuitive wayfinding elements.

Perhaps most importantly, effective wayfinding involves an integrated approach, using signage, on-line, and print resources to communicate the best route to guests.

Currently, St. Johns County lacks an effective, integrated wayfinding system. While some individual systems are in place or in development, such as the system currently being installed in St. Augustine, these are not part of a county-wide destination strategy. Visitors are often left to wonder whether they are on the right track on their journey via major arterial roadways. They sometimes struggle to grasp the extent and geography of the St. Augustine historic area, Ponte Vedra Beach area, St. Augustine Beach area, and other zones within the county. **We recommend the development of such a county-wide wayfinding system. Key components of this would be:**

- A consistent, attractive system of signage that is designed to connect to the St. Johns County brand. This system should clearly designate key pathways into the County with frequent reinforcement along major arterial roadways. It should identify key districts, such as St. Augustine Beach, and within these districts, direct visitors to key elements such as parking, attractions, and event areas.
- An attractive system of pedestrian signage that enhances the visitor experience in key pedestrian zones within the County. The design of this signage should be consistent with the overall signage system, but include pictographic depictions of these zones, such as aerial perspectives that are less map-like and utilize key landmarks for intuitive wayfinding. This system should also incorporate graphic interpretation to denote key historic landmarks throughout the County.
- Connected to the system of signage, the County should implement an interactive, pictographic map system on their key on-line visitor portals. This should utilize the same graphic conventions as the signage program, and orient the visitor to key landmarks as part of their pre-trip planning. Interactive features could include links to websites for member attraction and lodging.
- Also connected to the signage and on-line wayfinding elements should be a program of print wayfinding tools. These should be user friendly, and not overloaded with advertising content.

## Infrastructure Element #2 – Portals

For a visitor, portals are a key designation of arrival. Portals denote geographic boundaries, and suggest the differences between one area and the next. For a visitor arriving after a long journey, a portal assists them in making the transition from the challenges of travel to the anticipated enjoyment of a destination.

An effective portal design can provide reinforcement to the key attributes of a district. Like the signage and wayfinding, it can reinforce the brand in a very tangible way. **We recommend developing clear thematic portals at key entry points to distinct districts in the County.**

## Infrastructure Element #3 – Orientation

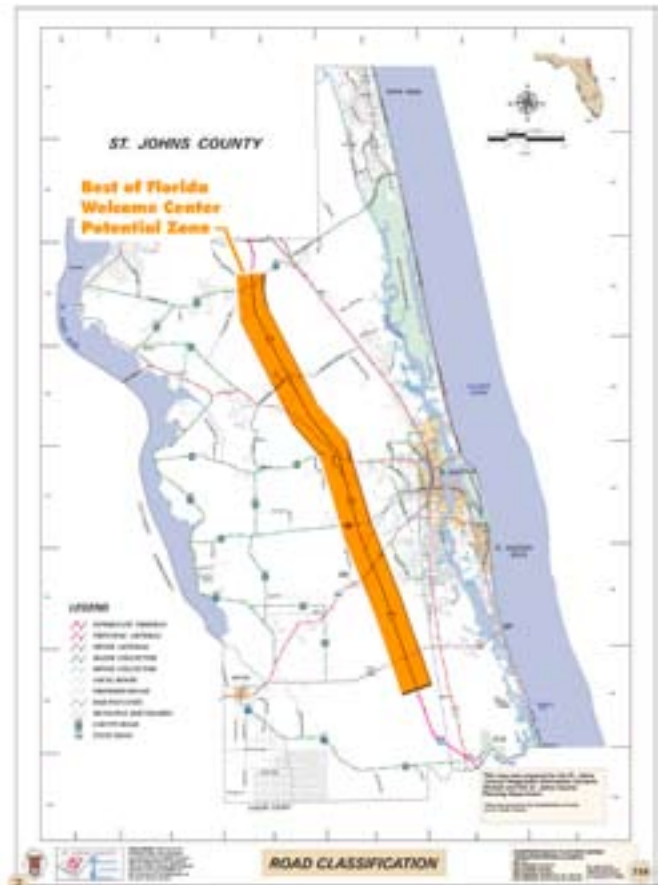
Clearly, the greatest change in the tourism industry is the use of on-line resources for travel planning. According to the US Travel Association's 2009 survey of Traveler's Use of the Internet, nearly 79% of travelers use online resources to plan their travel. However, this same survey indicated that for 71% of on-line travel planners, use of visitor information centers has remained the same or increased. PGAV's experience at similar destinations is that while visitors utilize the internet effectively to purchase airline tickets and book hotels, the majority of visitors do not plan visits to attractions until they arrive at the destination. Clearly, the role of a physical visitor orientation center is an important infrastructure consideration.

There are good examples to consider. At the Independence Visitor Center in Philadelphia's Independence National Historical Park, guest orientation is combined with attraction sales and interpretation. While visitors who come to the Visitor Center are visiting the Historical Park, they are also being introduced to attraction opportunities throughout the region. Some statistics related to the Independence Visitor Center:

1. Approximately 1.1 Million visitors visit the Center each year.
2. Of this number, approximately 23% report that they spend more time in the destination as a result of visiting the Center.
3. The average increase in expenditures as a result of extended duration of visit is \$311.
4. The Center has calculated that their operations have contributed to approximately \$84 Million in increased tourism revenue in the region.
5. Visitors to the Center visited 3.2 additional attractions as a result of their use of the Center.

**We recommend developing more effective orientation resources to maximize visitor penetration into the attractions and other resources of the County. Key initiatives can be described as:**

- Significant improvement to the Visitor Center in Historic St. Augustine to include more effective day planning resources, sales of attractions, and booking of hotel rooms. These improvements should also include interpretation, including potentially a special format film and interactive exhibits.
- Clear promotion of the Visitor Center in Historic St. Augustine as the place to begin your visit to the St. Augustine area. This should be accomplished through a combination of on-line promotion, public relations, and wayfinding.
- Development of an effective welcome center along Interstate 95, at a strategically located exit. This welcome center should be packaged as an attraction itself – for instance, featuring juried shows with artists in the region. This concept is similar to Tamarack, which is a welcome center featuring the “best of West Virginia.” PGAV researched this “best of Florida concept,” and it was well received, especially by first-time visitors. The focus of this welcome center would be primarily related to compelling a visitor to stay in the County on a return visit.
- Continued development of satellite visitor centers, especially located in “activity centers” such as St. Augustine Beach.





# Infrastructure Strategy

## Infrastructure Element #4 – Parking

Parking is often considered one of the most important and least understood aspects of destination development. Destinations often thrive or fail related to the availability of parking conveniently located to key attractions, shopping areas, and other tourism assets.

This issue is particularly true in Historic St. Augustine, where much of the parking has been consolidated in a major garage located at the northern end of the historic area. While this facility addresses parking in terms of overall capacity, it does not result in parking that is adequately distributed throughout the district. The City of St. Augustine has studied this, and has concepts for distributed parking within the historic district. **We recommend that the City further pursue the development of distributed parking concepts.**

PGAV has also reviewed the proposed development at St. Augustine Beach at the Pier. We believe that this development is important to the long-term viability of St. Augustine Beach as a family recreation area, and **recommend that parking capacity be carefully evaluated in association with this development.**

## Infrastructure Element #5 – Ground and Water Transportation

The County is comprised of many districts that combine lodging, attractions, and other activities such as golf. While each could be viewed as relatively self-contained, sub-destinations, each relies on the other to create the sense of a well-rounded destination.

We recommend investigating ways to enhance the interconnections between these sub-destinations with ground transportation shuttle services that offer visitors an alternative means of experiencing the overall destination.

A particularly appealing way to accomplish this would be the development of a water taxi service linking St. Augustine, St. Augustine Beach, and Vilano Beach. This could be similar to a program in Long Beach, called the Aquabus. This program is operated by Long Beach Transit, and charges \$1.00 for point-to-point transportation between six locations on the Long Beach Harbor Waterfront.



## Infrastructure Element #6 – Air Lift

Commercial air service will benefit the destination, but is not necessarily a cure-all. The lack of direct commercial air service into St. Johns County was cited by some meeting planners in our research with that segment as the only negative associated with the destination as a meeting and conference destination. This lack of service was also cited during interviews with local stakeholders as a barrier to securing additional conference business. The airport previously had service on discount startup carrier Skybus, but that service ended in 2008.

New commercial air service into St. Augustine remains a possibility, and the most likely carrier to initiate service is a low-cost carrier such as Allegiant Air. Allegiant has successfully initiated service into a number of underused or unused (at least in commercial air service terms) airports nationwide, including such previously unserved leisure destinations as Punta Gorda, FL; St. Petersburg/Clearwater, FL; and Phoenix-Mesa Gateway Airport, AZ. St. Augustine represents the kind of airport to which Allegiant is usually attracted: low operating costs; close to major metropolitan and/or leisure destinations; and little or no competition.



# Infrastructure Strategy

The real strength of Allegiant's business model is in vacation package sales. The airline is one part of a larger company that specializes in leisure packaging of airfare, hotel rooms, and car rentals. Many of the airline's seats are sold as a part of destination packages; in fact, 30% of the company's revenues come from packaging. This hotel packaging represents the real potential of new commercial air service to St. Johns County—bringing new markets of leisure travelers to the area from markets across the eastern half of the United States. Allegiant does not take federal Small Community Air Service Development (SCASD) grants from airports, so the service will have to sustain itself on its own merits and be almost immediately profitable. Allegiant has been known to give new markets very little time to prove themselves as stations.

There are likely to be fewer new startup airlines such as Skybus over the next few years, due to the poor track record of startups, the limited availability of capital, and the continuing uncertainty about fuel prices. So if St. Johns County is to receive new air service in the coming years, it will likely come from Allegiant, another niche carrier not currently serving Jacksonville International Airport (such as Spirit), or a carrier already at Jacksonville that can be recruited away from JAX. The third option is not likely for a "legacy" carrier such as Delta or American, and it is highly unlikely a carrier will ever choose to serve both JAX and St. Augustine.

As much as it would be a potential boon for leisure tourism in the county, Allegiant service to St. Augustine Airport would likely not benefit the meetings and conventions market in the same way. Allegiant does not offer connecting service (and does not have interline connections with other carriers) and offers limited frequencies, which probably means that few business-oriented travelers are going to use Allegiant to fly to St. Johns County. And one of the hubs for meetings and conventions in the county, Ponte Vedra, is about the same driving distance from St. Augustine Airport as it is from Jacksonville International (an airport already heavily served by both legacy airlines and low cost carriers).

The meeting planners' negative attitude towards the county's air accessibility as seen in the project marketing research may be as much about perception as it is reality. Ponte Vedra's proximity to JAX is comparable to or better than many urban and resort meeting destinations from their nearest major airports. And while downtown St. Augustine is twice as far from JAX as Ponte Vedra, the distance may be perceived as even farther than it is, or the city is not perceived as compelling enough to travel the one hour driving time for a unique meeting destination. One long-term marketing strategy should be to target those meeting planners who book business in the southeastern U.S. and who rely upon commercial air service for their meeting attendees, and execute a campaign aimed at changing those perceptions. Their attitude towards the accessibility of St. Johns County as a meeting destination can be benchmarked and measured over time.

There should also be a strategic decision made to determine how important commercial air service is to those hotels in St. Augustine and along the beaches in the southern and central part of the county. Given the relatively small size of many of these hotels and their meeting facilities, a concerted effort aimed at changing meeting planners' perceptions about the accessibility (by air) of St. Augustine probably isn't a cost-effective strategy. However, a targeted campaign aimed at meeting planners who could book business into Ponte Vedra and World Golf Village is likely to be more successful at generating new business.





# Marketing & Promotional Strategies

Marketing is far more than just advertising. It should embrace all aspects of the management of the destination brand, from product to promotion to brand. Creating an immersive, memorable, and profitable visit experience for visitors and the industry alike is an all-encompassing process that never ends. With that in mind, PGAV offers these action steps to help St. Johns County improve the destination experience with a combination of marketing strategies that will attract more visitors; encourage them to spend more time and money in the county; and create greater visit satisfaction.

## **St. Johns County must do more to help its visitors...visit.**

St. Augustine, Ponte Vedra and the Beaches are an incredibly complex destination. The county does offer “something for everyone,” but this amazing range of activity and appeal makes it a challenge to plan a visit and sometimes just as hard to actually visit. PGAV has recommended a number of approaches to enhancing the county’s destination products and infrastructure to assist the visitor and help them make the most of their visit. But marketing and promotional strategies and tactics can provide a number of effective solutions as well.

Assisting with visit planning and improving the destination experience are two clear paths to enhancing word-of-mouth marketing for the destination, increasing length of visit, and lifting visitor spending. Marketing research has shown that previous visitors are generally satisfied with their visitor experience. But visitor satisfaction measurement fails to capture the lost opportunity of motivating the guest to spend another day or two in the destination, or making them aware of new things to do and see (and invest their money). There are several marketing-oriented approaches the county can take to accomplish these objectives:

***Align St. Johns County tourism marketing efforts with the destination planning cycle.*** The typical traveler goes through a destination planning cycle that looks like this:

- Destination consideration
- Destination planning
- Shop and buy
- Anticipation
- Visit experience
- Staying connected

Organizing all of St. Johns County’s tourism marketing efforts in alignment with this cycle helps ensure that no potential dollars are left on the table as potential visitors decide where and how to invest their travel budgets. It also brings clarity to an enormously complex destination like St. Johns County. This strategy can be applied to communication with the travel trade as well, and have as much meaning for meeting planners, group leaders, and trade influencers as it does for the leisure traveler.

***Constantly invest in the web as the primary visitor planning tool.*** This report is not meant to be a comprehensive critique of the VCB’s current website. But any destination web presence requires constant investment in order to maximize what works and eliminate what doesn’t. St. Johns County’s destination web presence must be organized around helping the potential visitor plan their visit to this wonderful yet challenging place. That initiative must recognize what motivates interest in visiting St. Johns County, how to close the sale, and how to sell the visitor more than what they came looking for in their first engagement with visit planning and shop and buy phases.

Research from the travel industry specialist PhoCusWright in 2009 showed that over half (57%) of destination marketing organization website users reported that the site influenced their destination activity selection, which was higher than both accommodation selection (52%) and the influence upon the decision to visit the destination (50%). Given the remarkable (yet challenging) diversity of activities and attractions in St. Johns County, this just further strengthens the power of the destination website as an extraordinarily important marketing tool. That same research also indicated that those travelers who select their destination online are more likely to spend much more on their travel.

**Emphasize the stories.** St. Johns County's rich history is obviously a core competency. But the county must avoid falling into the trap of so many destinations of emphasizing history for history's sake, or subscribing to the "eat your veggies" syndrome. That's what occurs when destinations and attractions play up their history and try to motivate a visit "because it's good for you." Every destination has history of some kind. What should set places like St. Johns County apart is how interesting and significant the stories are to the typical visitor. There are some remarkable stories present throughout the county, but how they are told is of crucial importance. It cannot be a challenge to the visitor to identify them and determine how they want to engage with them on their visit. Each story must have a destination payoff; if the story is told on the website or in the printed travel planner (or anywhere, for that matter), the visitor must be able to easily identify how they can experience all or part of the story for themselves in a readily accessible way.

**Develop expert and enthusiast content.** Having identified its six core competencies, the county should leverage the visitor interest in each of them by continuing to develop marketing content which demonstrates its expertise in each area, and then sharing it with the marketplace across a variety of platforms. The VCB already does this through some of its vehicles, especially media relations, and there are other entities within the county (such as the World Golf Hall of Fame) which are actively engaged in telling an expert story to their audiences. The expert and enthusiast content is not limited to such obvious categories as history and golf; it should extend to each of the six competencies to build the destination's brand equity, help the traveler plan their visit, and create the perception of an immersive visit experience.

The expert and enthusiast content should be communicated through a variety of platforms—traditional media, public relations, websites, podcasts, video, and social media, to cater to the increasingly complex ways in which the same experts and enthusiasts receive their information. Rich media forms such as podcasts and video also convey a dynamic, active destination that is multisensory and not an antique that can't be touched or enjoyed.

**Identify and communicate complementary activities.** For each of the six core destination competencies, there should be a set of corresponding complementary activities presented to the traveler that round out the destination and provide cross-selling opportunities. This segmentation of the visitor population should be credible and help increase length of stay and visitor spending.

**Encourage more of the tourism entities in the county to link to the VCB website as the "official" destination information source.** There are still quite a few websites in the destination that do not link to the VCB website or provide sufficient destination information. For the thousands of travelers who are visiting the area or considering a visit and who do not ever see the VCB website, this is a lost opportunity to connect the various components of the destination together. The need to create connectivity between the different parts of St. Johns County—both physically and virtually—is particularly crucial in Ponte Vedra, which is in many ways aligned more closely with Jacksonville than it is St. Augustine. (In one noteworthy example, a prominent attraction within the county links to websites for the Jacksonville, Ponte Vedra, and the St. Johns chambers of commerce, but not to the VCB site.)

# Marketing & Promotional Strategies

***Wayfinding is a marketing responsibility, too.*** Enhanced countywide wayfinding is not limited to roadway and interpretive signs along the county's streets and roads. The traveling public is accustomed to interactive maps that not only provide driving directions from point to point, but many destinations are now using interactive mapping as a driver of visitor satisfaction and marketing tool to communicate depth and breadth of the destination, even including photography and video within their maps. For a generation that is both geographically illiterate and highly dependent upon tools such as Google Maps or Mapquest, static maps are increasingly archaic. Fifty-four percent of destination marketing organizations in the PhoCusWright research have included interactive maps of the destination on their sites, and another 23% plan to do so this year.

Electronic wayfinding is particularly crucial for a county that is attempting to sell a diverse and geographically varied destination. The county's wayfinding initiatives should extend beyond street signage and include online tools as well as kiosks that cross-sell the entire county. There are a variety of attractive all-weather kiosk solutions that would work particularly well in locations such as downtown St. Augustine, the Ponte Vedra Visitors Center, and the St. Augustine Beach pier.

***Expanded packaging of hotel rooms and attractions and activities is a destination brand strategy as well as a promotional tactic.*** While many destinations have not yet included the ability to book packages directly from their DMO websites—the 2009 PhoCusWright research noted that only 47% of destinations have implemented this capability on their sites—almost all destination marketing organizations have links to hotels (and even some attractions) which have their own packaging capabilities. These packages usually combine accommodations, activities, attraction tickets, and even meals and transportation. Their popularity among travelers (and DMOs) has increased in recent years as consumers look for efficient ways of planning and booking travel, and as they seek out deals in the current recessionary environment.

A county-wide emphasis upon packaging accomplishes a great deal in a complex destination like St. Johns County. Packages are a conduit for communicating the depth and breadth of activity for the visitor, particularly in cross-selling complementary activities and in increasing length of stay. They are also helpful in introducing repeat visitors to new and undiscovered activity, and in familiarizing new guests with the destination by making it easier for them to determine how to allocate their time and money.

But perhaps just as importantly as helping the potential visitor with her trip planning, packaging brings disparate interest groups together in ways that recognize common interests: extended length of stay; increased revenue; greater visitation. Segments of the industry that previously thought they had nothing in common learn to work together to sell the destination for their own good and the good of the industry. One consistent theme heard throughout the stakeholder interviews in the St. Johns County master plan project is that various constituent groups don't work well together or even talk very often. A review of the VCB website and the sites of many of the accommodations and attractions in the area demonstrates one aspect of this lack of cooperation and communication—there is little bundling of activities and attractions into hotel packages.

There are substantial numbers of "deals" and discounts provided to the consumer by the hoteliers in the county, and the golf segment appears to have performed much better at bundling rounds of golf with hotel rooms. But even some of what should be the largest drivers of overnight visitation in the county, such as the St. Augustine Amphitheater, do not have any hotel packages or links to specific, detailed packages on their websites.

One of the benchmark destinations examined as part of this project, Asheville, North Carolina, has taken a unique approach to bringing accommodations, attractions, and activity providers together. For the last two and a half years, it has utilized a process called “speed packaging” which brings these parts of the destination mix together in a single venue to encourage open discussion of mutual interests and the formation of packages geared to the leisure traveler. Participation has ranged from 11 to 26 attendees at each “speed packaging” session, although the CVB has noted that it needs to do a better job of encouraging accommodations to attend, possibly by providing Web-based promotional incentives to participate. (Most accommodations representatives have tended to be from larger hotels, too, with fewer coming from time-starved bed and breakfast innkeepers, for instance.) “Themed” speed packaging sessions (Christmas holidays or “family fun,” for example) have performed better at generating tangible results than non-themed sessions. Attractions have also partnered with each other to “sell” a pre-packaged idea to accommodations attending the sessions, making the process more efficient.

Packaging is admittedly hard work, and many travel and tourism professionals are unsure how to get started. It can be expedited by hosting how-to seminars for the industry, and by creating testimonials and case studies for the industry to see how it can be done successfully. There are accommodations and attractions that are using packaging successfully within the county, and those entities should be highlighted as positive examples of what can happen by working together.





# Marketing & Promotional Strategies

## Embrace the delicious side of St. Johns County

Culinary tourism has become a major driver of visitation in many destinations around the world. Travelers have increasingly seized upon the appeal of food as not just a satisfier of the visit experience or of hunger pangs, but as a true motivator that can make or break the choice of destination. This trend has been fueled in particular by two forces, both of which can play a positive role in the growth of St. Johns County tourism:

**Consumer preferences for locally grown and raised foods**—Arising out of concerns for food safety and the environment, as well as the desire to support local farmers, the trend towards locally raised and produced foods is a relatively new phenomenon of the 21<sup>st</sup> century. But it has become an important influence upon food marketers and retailers nationwide in a short time. In fact, the word “locavore” (used to describe someone who favors locally grown and produced foods) was the *Oxford American Dictionary* word of the year for 2007. “Local” is perceived as fresher; healthier; better for the local economy and the environment; and more authentic. The preference is not limited to traditional farm-to-table agriculture, either—locavores prefer regional microbrewed beers, seek out local ice cream and cheese producers, buy from farmer’s and tailgate markets, and crave restaurants with locally-produced or regional flavors on the menu. The trend is also closely linked to the Slow Food movement, an international campaign with its roots in Italy.

**The explosion of media and marketing surrounding the culinary arts**—There is a great deal more media attention devoted to food in all its many forms than even a decade ago, and the consumer interest in it shows no signs of letting up. Food TV, new magazine titles, network cooking shows, celebrity chefs, online blogs, and food and wine events have all blossomed as interest in the culinary arts has grown. There are now many books focused solely on culinary tourism, and groups such as the Southern Foodways Alliance dedicated to preserving regional food culture and heritage.

The executive vice president of the Charleston (SC) Convention and Visitors Bureau noted in our benchmarking interview with him that food is now a bigger motivator for visitation to Charleston than history for many visitors. Indeed, the annual Charleston Wine and Food Festival in early March has been praised as one of the top five food and wine festivals in the U.S. by *Forbes Traveler* magazine after only four years of existence. And the president of the Savannah CVB highlighted the influence of celebrity foodie and resident Paula Deen upon his city and the amount of media attention she has brought to the destination.

St. Johns County has the ingredients to leverage both of these trends into additional visitation and destination brand equity. The county already has a number of very good and recognized restaurants. The St. Augustine Independent Restaurant Association (SAIRA) is an ideal potential partner for the promotion of unique dining venues in the area. The agricultural heritage of Hastings is an appealing story that provides an instant connection between food and the history of the county (one of the primary attributes for which the destination is known). The multicultural richness of the county’s history is a vast storehouse of potential inspiration for local culinarians, especially the Spanish and Minorcan heritage which is unique to the area and which possess a culinary flavor of their own.

To leverage this trend and to become recognized as a food destination, there are a number of steps that the county's tourism partners can take to fulfill the potential of St. Johns County in this category:

- Create a county-wide food and wine festival. There are already elements of food-oriented special events in the county—the Ponte Vedra Food & Wine Fest, and the Hastings Cabbage and Potato Festival are two examples. But a county-wide festival (either as a multi-venue event or, more importantly, something that celebrates the entire county's deep historical and cultural heritage) could act as a true motivator to visitation and a catalyst for further local food and dining marketing initiatives.
- Develop media relations campaigns around the elements of food and dining that best express the uniqueness of the destination. With the vast number of journalists across a variety of media platforms now covering the culinary arts, there are many opportunities for the county to appeal to food bloggers, newspaper editors, freelance writers, and others who can draw attention to St. Johns County.
- Identify local food “stars” in dining, agriculture, beer and wine, and other areas who can act as centerpieces in marketing content generated by the local tourism industry.
- Encourage local community colleges to begin offering culinary programs to train future restaurant professionals and new restaurant entrepreneurs, and include curricula which emphasize local food and cultural heritage.

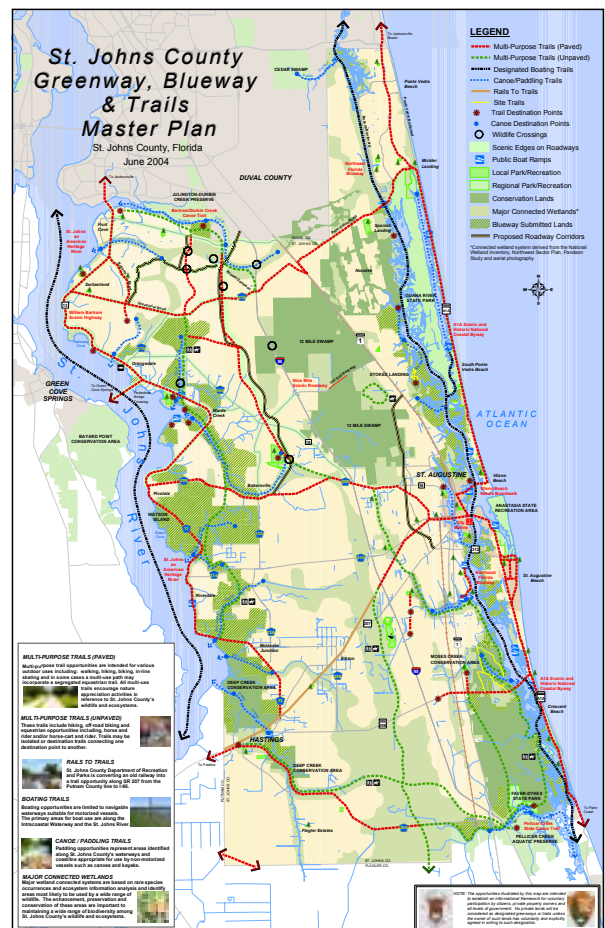
# Marketing & Promotional Strategies

## Thematic trails as a marketing media to tie together disparate geographic parts of the county

Thematic trails are being utilized by many different types of destinations around the country as a method of creating tourism marketing content and new products with little investment in bricks-and-mortar. These trails are as varied as the activities and interests of travelers in the 21<sup>st</sup> century, but many are based upon food, arts and culture, craft, music, wine, sports, history, and outdoor recreation assets. Many of the trails are marked with wayfinding and landmark signage, or accompanied by interpretive markers that support the trail and its theme. The idea of marked trails for travelers is not new; indeed, St. Augustine has long enjoyed a position as the eastern terminus of the Old Spanish Trail running across the United States from San Diego.

But thematic trails do not necessarily need to be truly physical in nature. They can also be “virtual” trails that are delivered to the visitor in a variety of different media: websites, podcasts, low-power radio transmission, mobile technology, and even old fashioned printed paper. Thematic trails can provide several benefits to a destination like St. Johns County:

- They are highly suited to a segmented approach to marketing communications, as they allow more of a one-to-one conversation to occur between the destination and enthusiasts who have deeper interest in the theme of the trail and greater potential for developing an emotional connection to the destination brand.
- Thematic trails are ideal for rich storytelling. They provide an environment for stories to be told in greater detail, enabling a stronger understanding of the destination and its benefits and attributes.
- They provide substantial new marketing content for destination websites, search engine optimization, and media pitches.
- Trails can connect geographically scattered regions of the county, and the attractions and activities that may possess much in common with one other. St. Johns County in particular stands to benefit from this approach because its tourism assets are located in several different places and not radiating from a central urban hub.
- Thematic trails are ideal for helping the visitor understand the depth and breadth of the destination, providing a user-friendly way to “connect the dots” and tie complementary experiences cohesively together while potentially increasing visitor spending and length of stay.



New technologies such as podcasts and mobile devices can provide a media-rich environment for promoting trails to potential visitors. Audio, video, and mapping can all be integrated into the visitor communication, and the trails lend themselves to a destination's enhanced social media presence. With a virtual trail, infrastructure investment is minimized and the trails themselves can be changed as necessary to accommodate highway changes, closed businesses, and additions to the trails.

St. Johns County offers several opportunities for the creation of thematic trails, many of which can be focused upon the core competencies identified in the master plan. One of the most significant is in the county's golf assets. The county has a cluster of golf assets at the northeast end of the county, and another cluster around World Golf Village. Tying those two areas and the golf sites in the rest of the county, and creating greater cross-selling of those assets, would generate more awareness of all of St. Johns County as a premier golf destination, rather than just a collection of destination assets scattered about many square miles. The inclusion of famed sites such as TPC Sawgrass and the World Golf Hall of Fame in a thematic trail can only benefit the other golf-related sites in the county, even if they are located miles away from Ponte Vedra or WGV. In addition, since the World Golf Hall of Fame attracts so many leisure transient travelers just passing through the area, it can be an ideal center for promoting all of St. Johns County as a golf destination.

Obviously, St. Johns County history is a theme that is rich with potential for trail development. The ACCORD Freedom Trail is an established asset built around civil rights and African-American history. The downtown area has the potential for several walkable thematic trails, and the area's rivers (particularly the Matanzas and St. Johns) can be interpreted as blueway trails for watercraft. The First Friday art walk events are another example of an existing "trail" that is interpreted online and which promotes a significant core competency of the destination in a manner that demonstrates critical mass and ties in with area restaurants and accommodations. The number of thematic trails in a destination like St. Johns County is almost limitless, given the diversity of attractions and the new media potential for interpreting and promoting them.





# Marketing & Promotional Strategies

## Position the beaches of the county as a competitive advantage

The extensive marketing research performed for this project clearly demonstrated that St. Johns County is known for two things in general: its history and its beaches. While we have observed that beaches are one of the core competencies of the destination, the classification of one destination's beaches as better than those in another destination is clearly a mostly subjective decision. There are as many preferences in beaches among travelers as there are beaches—some prefer the sugar white sand of the Gulf of Mexico, while others prefer the wide hard-packed sand beaches of the Atlantic. Some travelers prefer the quiet solitude of places like Sanibel or Cumberland Island, while others prefer the frenetic pace of destinations like Miami Beach or Myrtle Beach. Therefore, saying that the beaches of one place are “better” than another is clearly a risky proposition.

But St. Johns County does possess one attribute that will be perceived as a benefit by many members of the target audience that it is seeking. The lack of high rise buildings along its shores will be viewed by some as indicative of a sleepy or boring destination, but for so many travelers accustomed to miles of overdeveloped beaches in Florida, it will be seen as a blessing. Yet the county does not leverage this nearly as forcefully as it could in its communications. Simply saying that the beaches are “unspoiled” doesn't do enough to create a competitive advantage. The lack of high rise development cannot be implied to an audience that already lacks awareness of St. Augustine, Ponte Vedra and the Beaches in many cases. That competitive advantage must be clearly demonstrated in an advertising environment that is cluttered and littered with competing beach messages.

It must also be preserved. The county will, at some point in its future, be forced to consider whether high rise development is necessary for continued economic development. To allow one or two high rise buildings along its beaches as a means of redeveloping the shorefront will be tempting. But this is why stronger positioning of the beaches as a competitive advantage needs to occur now and not in the future. Visitors and potential visitors alike must be reminded why they enjoy coming to St. Johns County's beaches, so that the economic value of preserving them as scenic and intimate communities is realized. Otherwise, it will be easy for a developer to claim that the beaches are underutilized as economic assets and that high rise development will be of greater financial benefit to the county's governments.

PGAV's research also indicated that St. Johns County is perceived as a family-friendly destination, which we attribute to two factors. The first is the aforementioned lack of high rise development and the subsequent perception that the beaches are less crowded than beaches elsewhere. Maintaining this intimacy of community is important to continuing that perception. The second factor is the destination's well-known backdrop of history. Any high rise development along the beachfront would be perceived as jarring and off-brand from the typical visitor perception. High rises anywhere along the St. Johns coast (even if not visible from the historic district in downtown St. Augustine) would be a considerable detriment to creating a cohesive visit experience that covers the destination from one end of the county to the other.



# Marketing & Promotional Strategies

## Attracting the Upscale Traveler to St. Johns County

Ponte Vedra is fortunate to have a large number of permanent and seasonal residents with some of the highest average household incomes on the East Coast. It also possesses tourism assets with an undeniable appeal to an upscale traveling audience, including TPC Sawgrass, the Ponte Vedra Inn and Club and Lodge and Club, the Marriott Sawgrass, and the PGA TOUR Academy. Many of these assets are, of course, golf-based, which aligns with the interests of many of its visitors and residents.

There are other complementary attractions and activities, though, which can be used to supplement the premier golf attraction assets that Ponte Vedra and St. Johns County possess and to attract upscale non-golfers to the region (and there are far more upscale non-golfers than golfers, so this is a worthy strategic objective). An analysis of much of the market research performed by PGAV for this project during the last year reveals several interesting insights for the leisure traveler household earning more than \$75,000 annually. (This figure is likely on the low side for both the typical resident and visitor to Ponte Vedra, but this minimum number provides a large sample size for analysis and can be reasonably applied to the entire county.)

In general, research sample households with incomes above \$75,000 are most likely to be attracted to beaches; local and regional dining favorites; unique attractions or experiences; scenic beauty and drives; and historic sites, districts and events. (This observation applies to all destinations, and is not specific to St. Johns County.) For every one of those activities, the appeal is higher for the upscale traveler than it is for the under-\$75,000 household. St. Johns County already possesses a large number of those assets, and they should be cross-marketed to this traveler during both the visit planning phase and while visiting the county. These activities should also be enhanced and improved to improve the opportunity of attracting more first-time upscale guests. This will effectively promote Ponte Vedra and the rest of St. Johns County as a well-rounded, balanced destination that is not simply just about golf. Interestingly, though, previous visitors who were golfers while traveling in the area give the destination much higher overall marks and higher ratings on many of the county's attributes.

Fittingly, while looking at the specific activities of travelers during their last visit to St. Augustine, Ponte Vedra and the Beaches, the upscale visitor is most likely to have visited the beach; taken a scenic drive; and taken a self-guided tour of St. Augustine. These activities are also consistent with the most popular ones participated in by the overall visitor population, as seen in the PGAV research.

And consistent with their general leisure travel preferences noted above, dining and culinary activities also rated higher in the destination product concept testing research among upscale travelers than it did with the under-\$75,000 respondents. This was the one concept among all those tested that scored substantially higher for this audience than for the lower household income group.

If Ponte Vedra is to continue to evolve as a destination, it must find ways to broaden its appeal beyond just golf. Focusing upon complementary visit motivators and satisfiers such as fine dining and local culinary flavors, its unspoiled and underdeveloped beaches, its cultural activities, and its proximity to St. Augustine's many history-based attractions will enable Ponte Vedra to attract a stronger base of visitation. Those same motivators apply to the rest of the county, too, and should be used to attract and retain upscale travelers throughout St. Augustine and the Beaches, too. The area's golf assets are recognized worldwide by the sport's enthusiasts as among the finest in the world. But they are not the only reason why the upscale traveler should be compelled to visit St. Johns County.





# Prioritized Implementation Plan

According to the county web site, “tourism is St. Johns County’s economic engine.” As a generator of jobs, tax revenues, and investment, success of the overall tourism business is critical to the financial future of the county. The master plan is fundamentally a strategic plan for the business of tourism in the county. It is based on a straightforward business objective—to increase tourism revenue while protecting the brand of the destination and the quality of life for the residents.

The county is fortunate to be building on success. According to the web site, visitors spent almost \$712 million last year, a year that saw economic downturn for many communities. Even with this success, an entity as large and diverse as St. Johns County will have to make difficult choices about how to reinvest most effectively.

The destination master planning process for St. Augustine, Ponte Vedra, and the Beaches, Florida took into account a broad range of factors that comprise the current tourism situation. The process included interviews with stakeholders, consumer testing of existing awareness/perceptions, destination assessment, review of industry best practices, and consumer testing of specific concepts for the future. Through this process, PGAV Destinations was able to identify key strategic opportunities.

The strategic opportunities align with the six core competencies of the destination. Opportunities may be an attraction, program, event, promotion, or infrastructure, but they all require investment on some level and provide a direct or indirect return.

To further distill the list to the most cost effective opportunities, PGAV used a proven methodology of evaluating potential recommendations in an objective way against 13 criteria, weighted by importance. Investment cost and lodging-related revenue were most heavily weighted. Other criteria include positive impact on brand, experience enhancement, environmental impact, benefit to residents’ quality of life, and potential for public/private partnerships.

In addition to weighting, we scaled the criteria and assigned value based on increment. For example, an event may drive significant visitation, but if it lasts only one weekend, the scaled impact is less than an attraction that can drive visitation all year. The term “increment” refers to the amount of improvement an opportunity generates. For example, SJC enjoys significant destination wedding business. A promotional strategy to increase it is evaluated on an estimate of growth.

After scoring each opportunity and developing overall rankings, PGAV sorted them by type: attraction, program, event, promotion, and infrastructure. Timing is another key factor. The top scoring opportunities, arranged in the five category types, and shown in a broad time sequence, will provide the road map of action items for the TDC and St. Johns County.

## Attractions

### **Create/reinforce cultural districts**

Relatively low in cost and time needed to implement, this tactic drives new visitation by enhancing the destination's arts and culture offerings and making them available to a wide audience. The ratings reflect the cost effectiveness of taking an existing asset and packaging it into an enhanced asset.

### **Develop the area around St. Augustine Beach pier**

This project receives high marks for its potential as a public/private partnership and for serving as a catalyst for economic development in the beach area. The ability to influence length of stay is substantial, depending upon the type of project and its fit with the target audience.

### **Develop major history attraction**

St. Augustine has an abundance of history-based attractions, but a large legacy project that tells its big story in a compelling way has the potential to draw large visitation from new and repeat travelers and reinvigorate the entire experience. While expensive, it rates high because of its potential as a true signature attraction.

### **Major destination outfitter/nature center**

Much as a new major attraction can be an anchor for the area's history, a true destination nature center scores high marks for its ability to pull large numbers of repeat and new visitors, and to generate partnerships with private nature-experience providers and make it easy for travelers to enjoy the natural and scenic assets of the area.

### **Develop I-95 Regional Destination Center**

A highly visible regional destination may be expensive as a bricks-and-mortar project, but it is also a powerful marketing tool for pulling thousands of potential target audience visitors off busy I-95 and sharing the St. Johns County story with them. This scores high marks for reaching new potential visitors.

### **Add an interactive aquarium**

Good aquariums are very expensive and take time to plan and build. But this tactic has strong potential for SJC as a proven driver of visitation and length of stay in other destinations, and addresses the concern of family travelers in the research that there is not enough for kids to do in the area.

### **Enhance Fort Mose as a attraction**

As noted above, the African-American audience is ripe for potential visitation. And the addition of another strong history attraction in the area will be appealing to many types of visitors, as well as regional school groups (thereby enhancing local quality of life). However, there is some bricks-and-mortar investment involved that will be costly.

## Programs

### **Develop premium nature experiences**

Primarily a private-sector initiative (so its cost to the public sector is low), this recommendation is strong on generating increased length of stay and attracting new types of visitors, but the limited capacity of these activities means their incremental volume potential is also limited.

### **Create nature interpretive guides using mobile technologies**

New media interpretive tours that are easy to produce and inexpensive to distribute are an effective means of telling more stories about and enabling visitation to the county's many scenic and natural assets. This will not likely attract large new numbers of visitors to the county, but it will help promote all of the area's geographically scattered attributes much more efficiently.

### **Invest in more live interpretation in historic district**

This represents a substantial strategy for enhancing the authenticity of the historic downtown core, and in particular the appeal of the Colonial Spanish Quarter Museum as an asset. It is, however, expensive to execute.

# Prioritized Implementation Plan

## **Develop countywide self-guided history tour products**

While this improves the communication and interpretation of assets countywide, it does not contribute much to the enhancement of those experiences or to new or repeat incremental visitor volume.

## **Promotions**

### **Constantly invest in the web as the primary planning tool**

This is the most cost-effective way of creating destination relevance for a massive prospective target audience and upselling visitors to increased spending, longer length of stay, and new ways to enjoy their visit. The investment is not limited to a one-time new website project, but should or could include more dedicated personnel to manage the web presence, and new media tools.

### **Promote a signature arts style**

By using marketing resources to highlight a particular style or artistic expression that the county does particularly well, the destination can better create brand awareness for its competency in this area. This does not mean that other parts of the arts and culture community suffer, but it allows the destination to better stand out in a crowded field. This is a highly efficient use of resources to reach new and expanded audiences.

### **Support anniversary events as opportunity to maximize awareness**

Although they are primarily centered upon the next five years, these events have the potential to shape brand awareness for the entire county for many years to come if executed properly. They rank high for drawing both new and repeat visitors in large numbers—if properly executed in size, scale, authenticity, and relevance to the target audience.

### **Create a golf trail to convey more critical mass**

The entire area has substantial golf assets, but there is little connectivity between them that provides a county-wide sense of destination. This is a cost-effective way of packaging existing assets into a user-friendly medium that promotes length of stay among an important part of the target audience.

### **Increased promotion of unspoiled nature**

A highly cost-effective use of marketing resources that creates a point of difference from many other Florida destinations and highlights a core competency that can extend length of stay and attract new audiences.

### **Promote to golf vacationer that plays with family/spouse**

The marketing research has consistently demonstrated that St. Johns County offers something for everyone, meaning the destination's potential for attracting others in the target audience household who don't play golf is strong. However, industry research also shows that this segment is relatively small and doesn't possess the visitation volume potential of other strategies.

### **Promote the romantic brand**

Primarily a marketing initiative to take ownership of this market segment among Florida destinations. It has strong potential to pull both incremental repeat and new visitation, but doesn't do anything to enhance the destination for other types of visitors or create a legacy type of project for future generations.

**Cross-promote marketing through others**

Highly cost effective, this recommendation won't produce large numbers of new visitors but it will encourage longer length of stay and increased visitor spending through more efficient promotion of current assets among both public and private entities.

**Promote scenic trails or other designations**

A means of creating additional awareness of the county as a strong natural and environmental destination among new audiences that may have only limited recognition of this core competency. This scores high marks for generating tourism throughout the county, but is limited in its direct visitation volume potential.

**Promote SJC as a family reunion destination**

This marketing strategy has great potential for reaching a large new visitor audience, but does not fundamentally enhance the visit experience for other visitors or create other enhanced visitation streams beyond that one audience.

**Promote better communications between arts groups and others**

This tactic costs little, if anything. And it is not likely to spur any direct visitation from any segment, so it does not get high marks for generating visitor volume. And while this is inherently a public-private relationship issue, its impact in terms of scale of partnership is not great. But its potential for enhancing the typical experience of current visitors and promoting the entire county is as great as anything else in the recommendations.

**Make golf feel younger with non-traditional packages**

The primary appeal of this tactic is in its cost-effectiveness as a marketing tool and as a means of reaching out to a younger golf audience that may not be currently attracted to SJC. Offbeat destination packages generally receive good pickup in the travel media and can build brand equity even if they usually have limited capacity or reach a small audience.

**Promote African-American history**

Another highly effective marketing strategy, project research showed that this audience is not being influenced in a significant way by current and past tactics. While the visitation potential exists, it will take some time to motivate this market and change audience perceptions. Additional investment in product may also be required to boost the area's competitiveness.

**Promote as a Spanish heritage destination**

Similar to the African-American strategy, SJC has many Spanish-influenced tourism assets that can be cost-effectively marketed to an emerging audience of Hispanic travelers (as well as non-Hispanics). The anniversary events are an efficient way to initiate this strategy and leverage media coverage. Again, though, it will take time to build this audience which, while growing, is still smaller than others targeted by the county.

**Promote the destination wedding business**

With little additional marketing investment, the county can have a leadership position in this market. Although the market is relatively small in size compared to others, the segment can introduce many new potential visitors to the area. This strategy also supports a large number of private sector entities.

**Promote religious heritage**

This strategy is among the more targeted at reaching a growing group affinity market and can also cost-effectively leverage the anniversary events. While its audience appeal may be limited, it can provide group business to a wide variety of accommodations in the county.



# Prioritized Implementation Plan

## Events

### **Create a multi-day, multi-venue week-long signature event**

While not as expensive as most bricks-and-mortar projects, and because its direct impact is limited to a brief time, an ongoing event of this nature is limited in its visitation potential. However, something that truly drives overnight visitation and has an impact upon brand equity and awareness will still reach thousands of potential visitors who have an affinity for SJC or who are within the target audience but who have never visited.

### **Create an Aspen-style county-wide food and wine festival**

The development of a major new event to build the county's brand equity in this area can be expensive and complex, and it will only generate direct visitation for a brief time. However, the indirect brand and visitation impact is potentially huge as a way of drawing attention to this potential core competency and for creating awareness of county-wide assets.

### **Make THE PLAYERS Championship a county-wide event**

This event is probably the county's best-known event, and is a strong opportunity to cost-effectively market the rest of the destination to thousands of people. Some of that is already taking place, but could be enhanced by showcasing complementary events or activities that appeal to this audience. Its potential for driving visitation is limited, but the event should be leveraged in a significant way.

### **Create outdoor recreation showcase event**

Due to limited capacity and a brief duration, niche events like this are limited as drivers of direct visitor volume. They can also be somewhat expensive to stage, depending upon the event size and complexity. However, their destination brand building potential is strong, particularly among influencers who can have an impact on others, and they can also provide enthusiast content for year-long marketing efforts.

### **Golf technology showcase event**

A brand-building asset that can further showcase the county's world-class assets, but which has limited direct visitation potential.

## Infrastructure

### **Improve historic St. Augustine Visitor Center as "first stop"**

Because it is reinvestment in an existing bricks-and-mortar structure, its cost is relatively low. The project will not necessarily attract much additional visitor volume, but can substantially make better use of the existing asset to extend length of stay and increase visitor spending.

### **Develop county-wide wayfinding system**

Expensive to produce and time-consuming to plan, a countywide wayfinding approach will not generate much new or repeat visitor volume. However, it is among the strongest ideas for eliminating visitation obstacles and creating countywide impact.

### **Add more group sales staff**

With very few sales resources, the VCB often cannot effectively cover the many diverse audiences that are potentially interested in SJC. A relatively low cost of execution can have a substantial impact upon group volume even if its impact is limited elsewhere.

### **Eliminate downtown ordinances that hamper arts**

Costing nothing to execute, this will have little direct impact upon visitation, but will be a major asset to building brand equity as an arts and culture destination.

	Implementation Cost/Time (1-20)	Public Private Partnerships (1-5)	Brand Development (1-5)	Grow Overnight Visitation in Established Segments (1-5)	Attracting New Overnight Visitor Segments (1-10)	Extending Length of Stay (1-10)	Increase Overnight Stay Visitation (1-10)	Benefit to Resident Quality of Life (1-5)	Experience Enhancement (1-5)	Eliminating Obstacles (1-5)	Cross County Benefit (1-5)	Catalyst to Stimulate Other Development (1-5)	Environmental Impact (1-5)	Potential Return on Investment
<b>Outdoor Recreation</b>														
• Major Destination Outfitter/Nature Center	3	5	5	5	7	7	3	3	5	5	4	1	3	56
• Increased Promotion of Unspoiled Nature	15	1	5	3	6	8	3	1	1	1	4	1	5	54
• Cross Promote Marketing through Others	18	3	5	3	1	8	2	1	1	1	3	1	5	52
• Create nature interpretive guides/mobile tech	15	2	5	4	3	3	2	3	3	1	4	1	5	51
• Enhance existing nature access points	8	1	3	2	2	2	2	1	3	1	1	1	5	32
• Outdoor recreation showcase event	10	3	5	3	4	1	1	3	4	1	3	1	5	44
• Create scenic trails or other designations	15	1	5	2	5	4	1	2	2	1	4	2	5	49
• Develop premium nature experiences	18	3	5	3	6	6	1	1	2	1	2	1	5	54
• Promote unspoiled beaches and conservation	18	1	5	1	2	3	1	1	1	1	2	1	5	42
<b>Family</b>														
• Own the Authentic family destination category	10	1	5	3	5	5	1	1	1	1	3	2	5	43
• Add an interactive aquarium	2	2	5	3	7	6	3	4	5	1	3	3	3	47
• Embrace Marineland as a SJC attraction	18	2	5	2	3	3	1	1	1	1	1	1	5	44
• Develop the area around SJC Pier	8	4	4	2	8	7	1	5	5	2	3	5	3	57
• Promote SJC as a family reunion destination	15	2	5	3	7	1	3	1	1	1	3	1	5	48
<b>Arts and Culture</b>														
• Create a multi-day, multi-venue week-long signature event	10	4	5	8	8	3	2	3	1	1	5	1	4	55
• Create/reinforce cultural districts	15	3	5	3	8	4	4	3	3	2	2	4	5	61
• Add a civic performing arts center	3	3	4	2	2	6	3	5	3	1	4	2	3	41
• Promote a signature arts style	15	4	5	2	8	7	7	1	1	1	4	1	5	61
• Eliminate downtown ordinances that hamper arts	20	1	1	1	1	1	1	3	3	5	1	1	5	46
• Incubate artists/create neighborhoods	7	5	5	1	1	1	1	3	2	1	2	4	5	38
• Promote better communications between arts groups and others	20	2	1	1	1	3	1	1	5	1	5	1	5	47
• Develop sister city arts groups	15	1	3	1	1	2	1	3	2	1	2	1	5	38
• Facility to present and sell juried crafts	5	5	4	2	2	2	2	2	3	1	1	1	3	33
• Create an Aspen-style county-wide food and wine festival	10	4	5	5	6	3	1	3	3	1	3	1	5	50
<b>History</b>														
• Develop major historical attractions	3	1	5	9	7	8	4	4	5	5	2	1	3	57
• Develop county-wide self-guided tour products	15	2	4	1	1	3	1	1	3	1	4	1	5	42
• Support anniversary events as opportunity to maximize awareness	10	2	5	8	8	8	5	1	1	1	5	1	3	58
• Make Matanzas Bay a pedestrian friendly/water-front attraction	5	1	4	1	1	2	1	5	5	5	2	3	3	38
• Enhance Fort Mose as a attraction	10	1	4	1	4	4	3	5	4	1	3	1	3	44
• Promote African American history	18	1	5	1	3	3	3	1	1	1	3	1	5	46
• Promote Spanish heritage destination	18	1	5	1	3	3	3	1	1	1	3	1	5	46
• Promote religious heritage	18	1	4	1	3	3	5	1	1	1	1	1	5	45
• Invest in more live interpretation in historic district	8	1	5	1	5	5	3	2	5	1	1	1	5	43
<b>Romance</b>														
• Promote the romantic brand	15	1	5	7	7	7	1	1	1	1	1	1	5	53
• Promote the destination wedding business	15	3	4	2	5	1	3	1	1	1	4	1	5	46

# Prioritized Implementation Plan

Implementation Cost/Time (1-20)  
Public Private Partnerships (1-5)  
Brand Development (1-5)  
Grow Overnight Visitation in Established Segments (1-5)  
Attracting New Overnight Visitor Segments (1-10)  
Extending Length of Stay (1-10)  
Increase Overnight Group Visitation (1-10)  
Benefit to Resident Quality of Life (1-5)  
Experience Enhancement (1-5)  
Eliminating Obstacles (1-5)  
Cross County Benefit (1-5)  
Catalyst to Stimulate Other Development (1-5)  
Environmental Impact (1-5)  
Potential Return on Investment

## Golf

• Promote to golf vacationer that plays with family/spouse	15	3	5	2	5	6	5	1	1	1	3	1	5	53
• Make THE PLAYERS a county-wide event	18	2	5	2	3	3	1	1	2	1	3	1	5	47
• Create a golf trail to convey more critical mass	15	3	5	3	4	8	2	1	1	1	4	2	5	54
• Make golf feel younger with non-traditional packages	15	3	5	1	5	4	2	1	2	1	2	1	4	46
• Create and promote environmentally friendly golf course	3	4	5	1	3	2	2	2	2	1	1	1	5	32
• Cross promote at golf courses	15	3	5	1	1	2	1	1	2	1	2	1	5	40
• Golf technology showcase event	12	5	5	2	3	1	1	1	2	1	1	1	5	40

## Infrastructure

• Develop county-wide wayfinding system	10	1	5	1	1	3	1	3	5	5	5	1	5	46
• Create clear thematic portals	10	1	5	1	1	1	1	1	5	3	3	1	5	38
• Improve historic St. Augustine Visitor Center as "first stop"	12	1	5	2	2	8	1	1	5	5	5	1	5	53
• Develop I-95 Regional Destination Center	5	3	5	7	10	5	1	1	5	5	5	1	3	56
• Improve/Expand Satellite Welcome Centers	10	1	5	1	1	3	1	1	3	3	3	1	3	36

## Marketing and Promotional Strategies

• Constantly invest in the web as the primary planning tool	15	1	5	6	10	10	9	1	1	3	5	1	5	72
• Add more group sales staff	16	1	1	1	1	3	10	1	1	1	3	1	5	45





