

NASSAU COUNTY

Destination and Community
Enhancement Strategy | 2023



The overarching objective of the Destination and Community Enhancement Strategy is to promote the sustainability of the destination, while ensuring a balance between visitor management and quality of life for residents.

As we all recognize, tourism has been an increasingly important part of Nassau County's economy for the past several decades. Visitor spending not only creates jobs Countywide, but it also increases experiential options for residents and visitors alike. We have an opportunity to expand the benefits of a sustainable tourism economy to residents, community organizations, and small businesses across the County.

John Martin, Chairman

AMELIA ISLAND TOURIST DEVELOPMENT COUNCIL







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EXECUTIVE SUMMARY

With the continued success of Amelia Island's tourism industry and the ongoing growth and opportunity in Nassau County, the Amelia Island Tourist Development Council (AITDC) embarked on a Countywide Destination and Community Enhancement Strategy (the Strategy) on behalf of the Nassau County Board of County Commissioners (BOCC). This exciting and highly anticipated process began in early 2022 when the AITDC supported the engagement of the JLL Global Tourism & Destination Advisory Practice (JLL) to facilitate this strategic planning process.

The evolution of Nassau County as a destination with an enhanced quality of life brings economic prosperity. As the County's top private job creator, the visitor industry supports more than 25% of all jobs in Nassau County and generates almost \$1 billion in annual economic impact. This prosperity enhances the Nassau County community through a wide variety of positive impacts.

In collaboration with the BOCC, the AITDC -- as the County's Destination Organization (DO), oversees the development of the tourism industry on Amelia Island. The BOCC currently contracts the Amelia Island Convention & Visitors Bureau (AICVB) to execute the marketing of Amelia Island as a world-class tourism destination. Since its inception, the AITDC has supported tourism initiatives to produce record-breaking economic performance and community impact year after year, while supporting events and activities that add to the experiences available to residents and visitors.

The goal of the project was to assess future opportunities, outlining strategies and actions that would potentially support the development of a Destination and Community Enhancement Strategy across the entire County while also addressing current concerns, challenges and opportunities faced by both industry and County residents.





Over the past 13 months the AITDC has partnered with JLL, local industry leaders, municipalities, residents, partner organizations, and a broad spectrum of stakeholders to develop a Destination and Community Enhancement Strategy for Nassau County. The Strategy will provide a framework for current and future opportunities and reinvestments, as well as manage the current growth and explore potential destination and community enhancements across Nassau County.

This detailed Four-Phased strategic approach involved a review of existing studies, such as the County's adopted Comprehensive Plan, to further align Countywide efforts, as well as engaging more than 700 Nassau County stakeholders to understand and assess all potential priority areas. After diligently incorporating feedback from stakeholders, gathering input from residents, conducting comprehensive market research, and considering relevant existing plans, it became evident that this Strategy should prioritize ongoing reinvestment in the current tourism economy while also expanding its influence across the entire County. Additionally, a focus on organizational support would be required for the broader Countywide outcomes of the Strategy.

While the Strategy encompasses the entirety of Nassau County as a destination, there are three geographic focus areas: Amelia Island, the Mainland, and Countywide. These geographic references will be important throughout this Strategy, with recommendations tied to each area. Specific aspects of the Strategy address existing demand generators, while others suggest opportunities to further enhance the Mainland as a visitor destination. Both will support enhanced quality of life for residents and align with the County's overall projected growth. The resulting Destination and Community Enhancement Strategy complements the outcomes of the County's adopted Comprehensive Plan.



Enhancement Strategy Phases

01

LISTEN

Meet

Meet with leadership

Set project Steering Committee

Identify, engage and survey key stakeholders

02

RESEARCH

Gather

- Current Positioning Market Study
- Competitive Position & Aspirational Destination Benchmarking
- Leisure Event Analysis
- Tourism Readiness & Sustainability Index
- Demand Driver Scorecard
- Lodging Inventory Analysis
- Convention Center Optimization

03

VISION

Strategize

Priority Identification

Departmental Recommendations

Organizational Assessment

Identify Metrics

Funding Source Strategies

04

ACTIVATE

Recommend

Final Plan Development

Presentations to leadership & stakeholders

INTRODUCTION AND GOALS

Key Terms

Tourist Development Tax (TDT)

Florida law allows counties to impose a local option transient rental tax on rentals or leases of short-term accommodations for a term of six months or less. This TDT, also referred to as the bed or tourist tax, is a percentage user fee paid by overnight visitors staying in hotels, motels, apartments, rooming houses, mobile home parks, RV parks, or condominiums. In Nassau County the TDT collection is 5%.

Florida State Statute 125.0104

State statute 125.0104 governs the tourist development tax including the procedure for levying and authorized uses of TDT, as well as the appointment of a tourist development council by the governing board of a county.

Destination Organization

A destination organization, also known as a destination marketing, destination management or destination leadership organization, serves as a champion of the destination, creating tourism-driven economic impact through destination management and promotion for the greater good of the community.

Key Partners

Tourist Development Council

Appointed by the Board of County Commissioners, a tourist development council is an advisory council that recommends tourism policy to the Board and oversees the use of the TDT pursuant to Florida law.

Nassau County Board of County Commissioners

The Nassau County Board of County Commissioners (BOCC) serves as the governing authority for Nassau County, Florida. In this role the BOCC has the final decision on the allocation of funds recommended for tourism.

Nassau County Clerk and Controller

The Nassau County Clerk and Controller (Clerk) serves as the auditor, recorder and controller of all County funds, including those generated by the Tourist Development Tax (TDT).

Nassau Prosperity Alliance

Coalition of organizations that drive economic prosperity and business development throughout the County including the Amelia Island Convention & Visitors Bureau, Florida Small Business Development Center, Nassau County Chamber of Commerce, Nassau County Economic Development Board and Prosper Nassau (representatives from Nassau County's office of Strategic Advancement).

Mainland

Defined as all areas of Nassau County with the exception of Amelia Island.

Nassau County Tax Collector

The Nassau County Tax Collector is responsible for the collection of TDT and compliance of short-term rental owners.

Amelia Island Tourist Development Council

The Amelia Island Tourist Development Council (AITDC) is a volunteer, citizen-based committee that is appointed by, and serves at the pleasure of, the Nassau County Board of County Commissioners (BOCC). The AITDC is charged with providing

recommendations to the BOCC on tourism related matters including, but not limited to, the creation of marketing plans, new product development, and the expenditure of Tourist Development Tax (TDT) funds. The AITDC is also charged with the continuous review of expenditures of TDT funds and has the ability to report unauthorized expenditures of the fund monies to the BOCC and Department of Revenue. Annually, the AITDC, with assistance from Amelia Island Convention & Visitors Bureau (AICVB), recommends a proposed TDT fund budget for the BOCC's consideration. The BOCC has the final decision on the allocation of funds. The BOCC is ultimately responsible for the expenditure of all TDT funds.

Amelia Island Convention & Visitors Bureau

To ensure proactive and professional management and execution of related tourism programs, initiatives, and special projects, the BOCC contracts with Amelia Island Convention & Visitors Bureau (AICVB) as the destination organization to provide administrative and operational support to the AITDC and related tourism activities. This includes, among other items, the preparation of marketing plans, management of tourism related contracts, development of new products, expansion of the tourism market, and preparation of an annual budget for the AITDC and BOCC's consideration.

JLL Global Tourism & Destination Advisory Practice

JLL Global Tourism & Destination Advisory Practice (JLL) was engaged by the BOCC to facilitate the strategic planning process whose results comprise this report, including assessment of future opportunities, as well as strategies and actions to support the development of a Destination and Community Enhancement Strategy across the entire County.

OPPORTUNITY TO ADVANCE BEYOND THE ISLAND

Tourism has been an increasingly important part of Nassau County's economy for the past several decades. Amelia Island visitors' spending not only creates jobs Countywide, but it also increases experiential options for residents and visitors. Now there is an opportunity to expand the benefits to residents, community organizations, and small businesses across the County.



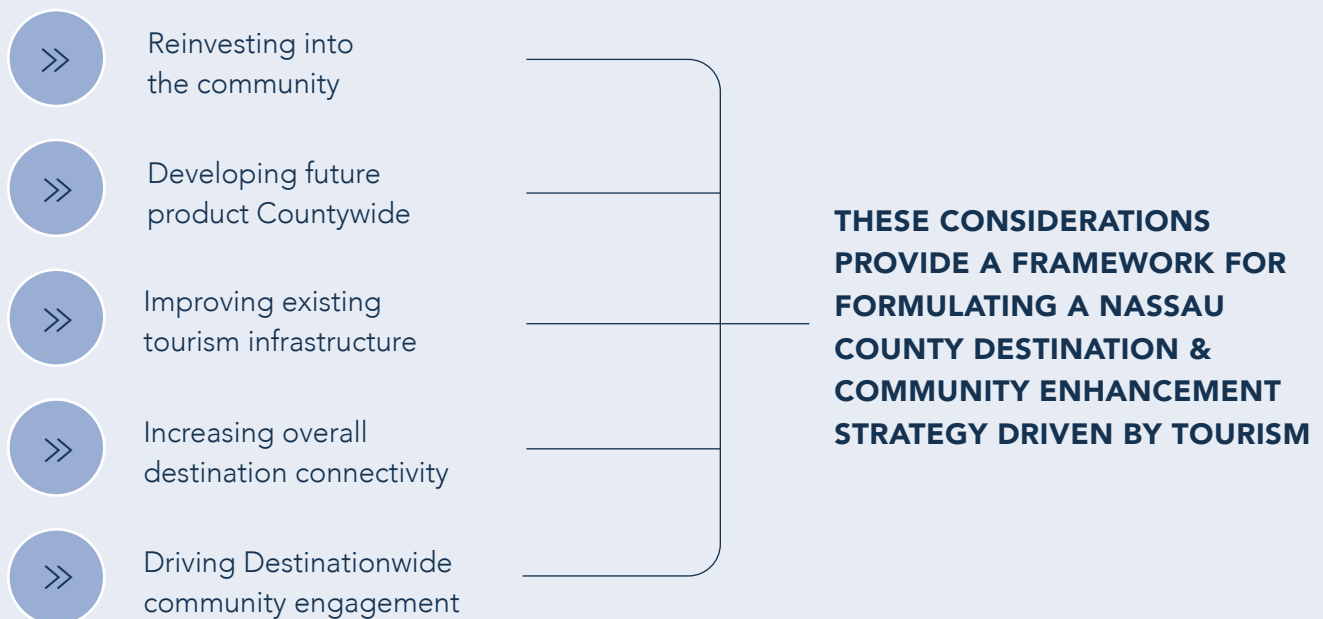
The overarching objective of the Destination and Community Enhancement Strategy is to promote sustainable growth of the destination, while ensuring a balance between visitor management and quality of life for residents. The Strategy seeks to explore, potentially enhance, and enrich the broader Nassau County experience, with a focus on creating a destination and home that future generations will enjoy and cherish.

The consensus of the research conducted, and the engagement of the tourism stakeholder community, is that Nassau County's current focus on Amelia Island must remain. However, after a thorough review of the Mainland, it became clear that there is an opportunity to expand the positive impact of tourism to other parts of the County. The first phase of this Strategy places priority on product and experiential development for residents and visitors.

To achieve this, JLL recommends that the BOCC consider expanding the Tourist Development Tax (TDT) Countywide. Expanding the TDT to all of Nassau County will require a referendum. The cornerstone recommendation of this Strategy is

that the County prepare for a 2024 referendum with this as a ballot measure. Subsequent recommendations of this Strategy tied to TDT expansion should be part of the support for the referendum, including the focus on new experiential product development for residents and visitors on the Mainland. The details of this Strategy outline a series of investments with potential to drive visitation and positively enhance quality of life supported by TDT expansion.

Amelia Island's success has demonstrated that managing visitor demand offers economic growth opportunities. These include: creating jobs and supporting new local businesses; increasing sales tax collections; funding improvements to infrastructure to beautify the destination; preserving natural resources; continuing support of current visitor and resident amenities; and promoting the growth and success of local restaurants, retailers, and other tourism businesses. The Nassau County Destination and Community Enhancement Strategy encompasses five key considerations:



Quality of Place

BENEFIT TO RESIDENTS AND VISITORS ALIKE



The recommendations and priorities outlined in this Strategy are geared toward community reinvestment in Nassau County. For purposes of this Destination and Community Enhancement Strategy, quality of place includes more than quality of life. It entails leveraging the existing robust tourism economy to spur greater enhancement to emerging areas of the County, while also improving the overall quality of life for residents. This Strategy reflects a commitment to balancing capacity for new and enhanced tourism products, while also bolstering the experience for visitors and residents alike. The successful implementation of this Strategy, in tandem with Nassau County's adopted Comprehensive Plan, will result in a more vibrant and prosperous Nassau County.



STAKEHOLDER ENGAGEMENT

The most crucial component of an effective Destination and Community Enhancement Strategy process is the inclusive engagement of the voices that make up its stakeholder community. The goal of this Strategy was to build Countywide consensus on existing and new tourism efforts and alignment on strategic expansion. With that in mind, eliciting stakeholder feedback was fundamental.

The Destination and Community Enhancement Strategy process included outreach to more than 700 individual stakeholders, residents, and community leaders. This process provided stakeholders a variety of touch points to give input and feedback. In addition there were interviews conducted in all areas of the County. This has led to a broad spectrum of recommendations.

700+

Total stakeholders engaged

09

Tourism Development Council Members

07

Focus groups with 10-15 participants

40

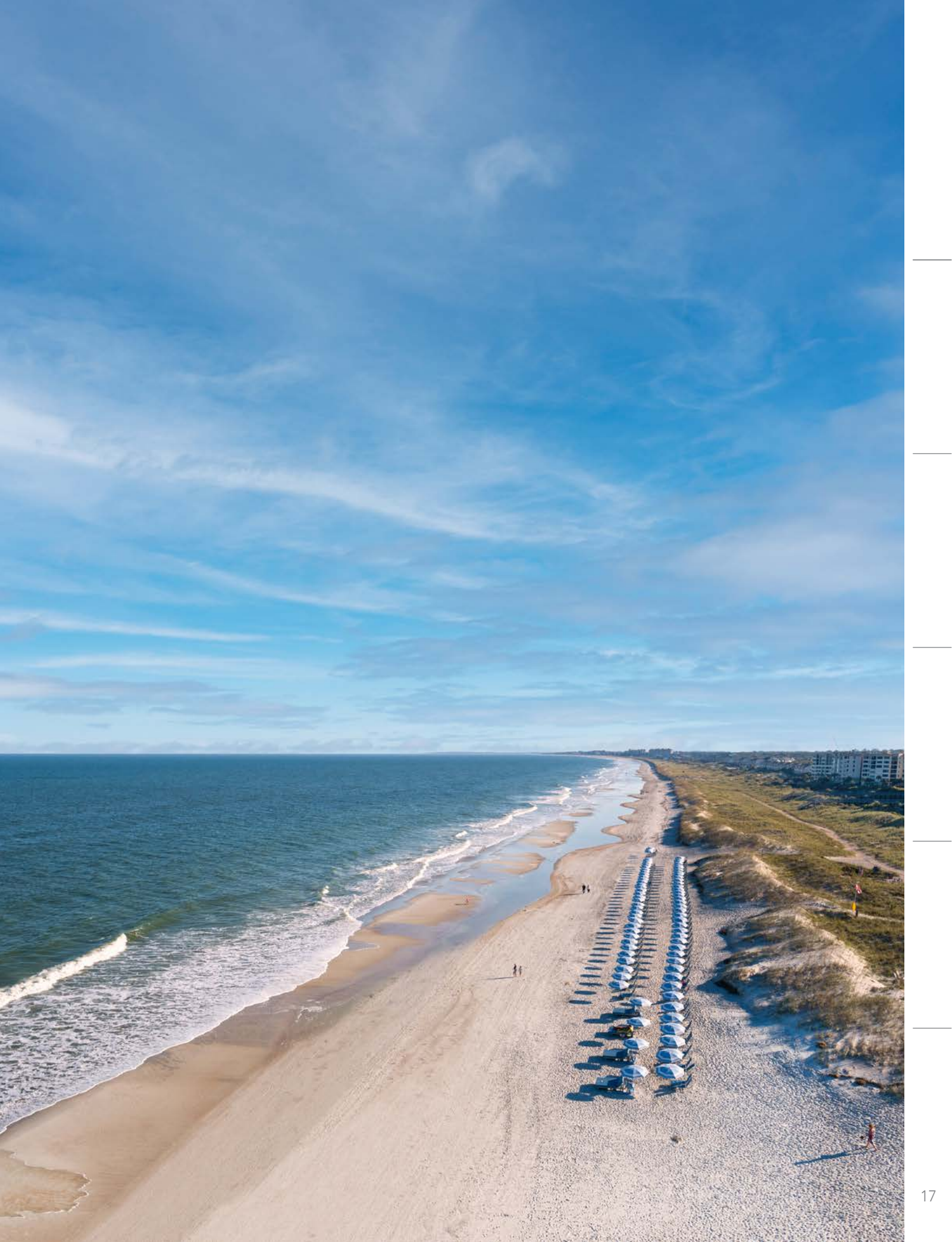
Individual interviews

657

Total stakeholder survey responses

03

Tourism-focused workshops



The input provided by stakeholders was instrumental in building the foundation for the priorities and recommendations of the Strategy. The feedback also provided initial data that was ultimately validated through market research in Phase Two of the Four-Phased approach. In addition, multiple AITDC workshops were conducted to gain more insight on the Strategy priorities and discuss key implementation components. These key themes are a synopsis of the hundreds of stakeholder conversations and quantifiable feedback collected from the survey:

- Amelia Island has a mature tourism economy, which performs consistently well and benefits the local economy.
- Amelia Island is geographically limited and concentrated, especially during peak periods. It is important to review the impact on quality of life for residents when determining future priorities.
- There are specific examples of interest in the Mainland. However, a great opportunity exists to expand on the few product offerings. Authentic product development should be the primary focus to further tourism's positive impacts to all of Nassau County.
- While stakeholders highly value and support Amelia Island's tourism economy, the desire is to maintain balance with resident quality of life.
- While progress has been made over recent years, there are opportunities to upgrade current County and City business development policies to simplify and speed the process in support of small business owners.
- Tourism infrastructure investment is essential for the industry's expansion and sustainability for reasons including improving the visitor experience and supporting the industry workforce.
- It is crucial to the future success of the destination to reinvest in improvements to existing tourism product such as the beaches, downtown experiences, or fairgrounds.
- With the inevitable growth of the population, proactive measures are needed to address capacity, support of small businesses, workforce concerns, and overall destination connectivity.
- To increase tourist tax collections and support local businesses, while maintaining a steady visitor count, it is important to implement a strategy that targets out-of-town visitors who are likely to stay longer. This approach will help provide balance to visitor distribution throughout the year and create a more sustainable and impactful tourism industry for Amelia Island. In addition, this will enable the growth in visitor numbers to shift to new experiences on the Mainland over time.
- Community reinvestment is a pillar of this Strategy. The BOCC, the County's DMO, and leaders in the tourism industry recognize that reinvesting in the local community and enhancing quality of life is critical to the long-term sustainability of the tourism industry on Amelia Island and in Nassau County.



MARKET RESEARCH AND CONCLUSIONS



Local Market Findings

Nassau County continues to experience significant growth with the population increasing by more than 30% since 2010. Forecasted growth for the County is expected to outpace the national average, with an anticipated growth rate of 9%¹. This growth rate is fueled by the \$100,000-\$149,000 and \$150,000-\$199,000 household income brackets. When combined, these income brackets will account for nearly 50% of Nassau County households. These trends have some positive implications and also highlight the importance of proactive strategies related to workforce housing.

Amelia Island accounts for 15% of Nassau County's population, however during the day Amelia Island's population it's nearly double that figure as people come to the island for work and leisure. In contrast, the Mainland's population slightly decreases as most residents work in surrounding counties.²

Amelia Island's average home value is nearly 20% higher than homes on the Mainland. The County's population is also highly educated, with 32% holding a bachelor's degree or higher. That percentage increases to 44% for those on Amelia Island.

1 Reference U.S. Census Bureau 2022-2027 Forecast

2 Source: ArcGIS/Business Analyst

Lodging Findings

Amelia Island and the Mainland combined, account for a total of 2,770 hotel rooms across 33 properties. According to Smith Travel Research classifications, hotels are evenly distributed, with Luxury making up 18% of the market; Upper Upscale representing 27%; Upscale 18%; Upper Midscale 26% and Economy at 11%. The majority of this inventory is located on Amelia island, accounting for 82% of all hotel rooms and 100% of luxury, upper upscale, and upscale rooms. On the Mainland there are 10 properties representing nearly 500 hotel rooms. Yulee has the greatest share of inventory, with additional rooms in Hilliard and Callahan. All rooms on the Mainland are classified as limited service, which refer to properties that offer limited facilities and amenities, typically without a full-service restaurant. Currently, only the lodging on Amelia Island collect TDT.

Nassau County hotel performance has been steady despite the pandemic's impact, with occupancy and rates outperforming 2019 within two years of the COVID-19 onset. The 2022 year-end saw the County's hotels average more than 79% occupancy with a \$140-160 average daily rate (ADR). Amelia Island hotels drive up the County average, with ADR expected to reach \$330 by 2027.¹

Additionally, Nassau County has slightly more than 1,500 active short-term rental listings, with 95% of all listings on Amelia Island.² The average occupancy and ADR in 2022 was 68% and \$348 respectively, compared to Mainland listings averaging 58% and \$161. The performance of the lodging market showed a quick rebound from the impacts of COVID-19, which demonstrates the high demand for Amelia Island.

1 Source: STR

2 Source: AirDNA

Demand Driver Analysis

Nassau County has a mature tourism economy on Amelia Island, comprising natural resource assets and attractions, as well as the charming downtown of Fernandina Beach. The quantity and quality of these assets is an important meter when considering how leisure travelers make decisions about where to visit and why. The process included an analysis of these key assets driving visitation.

The Demand Driver Score Card is a JLL proprietary process that serves to analyze the weight any individual asset has in influencing the visitor stay. The analysis is a multi-step assessment of destination assets. The higher the score the more likely the asset is to drive incremental visitation. The process included:

- » Utilizing visitor traffic to assess current demand
- » Utilizing the outcome to identify future competitive position
- » Scoring assets based on eight criteria
- » Recommending new investment or enhancements to grow assets on the scale
- » Designating anything with a score of 60-70 or higher as Nassau County's Attractors

The Demand Driver Score Card includes key criteria with a total value of 100 points. Those assets and amenities scoring above a 60 are defined as attractors that cause visitation. The visitation draw scales from 60-70 as a regional draw, 80-90 as a national draw, and 90-100 as a global draw. Competing for leisure visitation is increasingly competitive and the Demand Driver Score Card outcomes help identify current positioning as well as opportunities for future concentration and growth.

This process identified that Amelia Island has a concentration of key assets scoring a 60+ on the scale, with beach experiences and the Fernandina Beach Historic Downtown scoring a 85 and 77 respectively. Fort Clinch State Park, The Ritz-Carlton Amelia Island, Omni Amelia Island Resort, fishing, and other outdoor experiences also scored in the 60-70 range. These assets alone are attractors capable of garnering interest and visitation at the regional and even national levels. And while the Mainland lacked any notable demand drivers, the potential for investment in new tourism product was high.

The outcomes from this analysis supported the formulation of several priorities and subsequent recommendations on positioning Nassau County for growth and driving new product development for the future.



Event Analysis

As part of the Destination and Community Enhancement Strategy process, a thorough examination was conducted of the existing events within the destination landscape, utilizing JLL's event evaluation tool (Event Matrix). The proprietary analysis included an evaluation of prominent events to identify their requirements and forecast their needs for the next decade, recognizing their significance in attracting visitors. Events are a critical factor in any destination strategy and often help introduce visitors to a destination as well as provide new opportunities for residents, community non-profits and organizations, and small businesses.

The process included:

- » Identifying key events that are visitor-facing
- » Rating events on a matrix using 13 broad-based criteria
- » Identifying those events that can grow in specific areas through matrix outcomes
- » Recommending working with event organizers going forward on tactics for implementation

The Strategy's development studied 15 of the destination's top leisure events currently driving a higher level of economic impact. The concentration of the Strategy's development was on higher profile leisure events where economic impact is felt and quality of life is enhanced and therefore how the Event Matrix criteria could be applied and support future enhancements.

It is recommended that the Event Matrix be used as an ongoing approach with current event organizers to "strategize" on their current approach and evaluate the investment value and overall

ability to drive overnight visitation of future events while positively impacting the quality of life for residents.

Hoteliers, retailers, and other relevant stakeholders reinforced how important an ongoing event strategy is to impact their businesses when it is needed most.

The events studied included the Amelia (Concours d'Elegance), Dickens on Centre, Northeast Florida Fair, Amelia Island Jazz Festival, Amelia Island Restaurant Week, Amelia Island Chamber Music Festival, and several others. While these complementary events carry a visitor impact, their overall scores indicated limited overnight visitation, economic impact into the destination, as well as programming and marketing opportunities. Events, and the role the County's Destination Organization plays in positioning them to benefit the destination, will be an important consideration for the duration of this Strategy. In addition to the visitor impact, events will be reviewed with a focus on how they support an enhanced resident experience.

Tourism Readiness Index & Benchmarking Findings*

JLL and the World Travel and Tourism Council have developed a groundbreaking Index that analyzes more than 70 data points to assess Tourism Readiness. This was conducted as part of the Strategy development process. The Market Study included indexing more than 100 cities and further analysis of nine destinations to determine how Nassau County currently competes and is positioned to grow the impact of its tourism economy. The destinations in the Index and benchmarking work included Key West, Sarasota, Clearwater, Sarasota County, West Palm Beach, Panama City Beach, Walton County, Jacksonville, Amelia Island, Nassau County, and Nassau County Mainland.

The Tourism Readiness Index* analyzed Nassau County geographically in three ways: Nassau County Overall, Amelia Island, and the Mainland. The Index's eight pillars of Scale, Concentration, Leisure, Business, Urban Readiness, Environmental Readiness, Safety & Security, and Policy were applied to all three of the destinations for Nassau County. Each category includes between 5-15 data points that are weighted and scored. The outcomes from this analysis determine what features of the destination to be prioritized in order to ensure long-term growth and to positively impact the local economy through tourism's benefits.

The following is an overview of the findings:

01 Scale

Inventory and volume of a destination's tourism infrastructure.

- » Amelia Island is a small destination, despite its recent and intense growth. Among markets studied, Amelia Island is one of the smallest with 70% fewer "things to do" than the average in the set.
- » On-island hotel rooms account for 82% of all hotel room inventory. Among counties studied, Nassau has 107% smaller hotel room inventory than the average.
- » On the meetings and conventions front, Amelia Island has significant hotel meeting space totaling 213,115 square feet. Despite having less hotel room inventory, Amelia Island hotel meeting space square footage is in line with set average.

02 Concentration

Density of visitors within the destination as well as visitation timing over a year.

- » When assessing the density and demand for visitor assets, Amelia Island exhibits characteristics commonly associated with a mature visitor destination, including signs of excessive visitor pressure and strain on resources.
- » When total visitors are analyzed against total population, Amelia Island ranks the second highest of the competitive set, while Nassau County/Mainland ranks last.
- » When arrivals are considered against "things to do" the destination falls in the middle of the competitive set.
- » Amelia Island has the fourth highest concentration of visitors per square mile in the competitive set.
- » Amelia Island has the third highest percentage of home rental listings compared to hotel room inventory.

03

Leisure

Focuses on elements that cause a vacation-style trip.

- » Amelia Island's strongest category, Leisure travel, forecasts an increase in the next five years.
- » Amelia Island has the third highest ADR and percentage of luxury hotel rooms, while the Mainland ranks last among the set.
- » Amelia Island ADR is projected to surpass \$330 annually by 2027, marking a 10% increase from current levels.
- » Amelia Island has a high concentration of quality assets (3+ star ratings on TripAdvisor/Google), while the Mainland is still in the early development stage.
- » Amelia Island attractions account for 93% of attractions within Nassau County.

04

Urban Readiness

Examines investments beyond Travel & Leisure, focusing on flow and accessibility throughout the destination and its potential to attract business opportunities, talent, and visitors.

- » Amelia Island has the second highest cost of living, only second to Key West.
- » Nassau County had an unemployment rate of 2.5% in 2022 compared to Amelia Island's rate of 4.0%. These percentages rank each destination within the lower and higher quartile of competitors respectively.
- » Nassau County's forecasted population growth through 2027 is in line with set, while Amelia Island remains flat.



Dawning Developer vs. Emerging Performer

The outcomes from this analysis place Nassau County (Mainland) on the Readiness Index as a "Dawning Developer," meaning that it is a destination on the cusp of potential growth in the tourism sector and indicates a significant opportunity for development. It is experiencing above average growth and, with the rapid reach of new audiences, the need for increased infrastructure will be important to manage success.

The outcomes from the analysis place Amelia Island on the Readiness Index as a "Emerging Performer" signifying that it has growing momentum. The destination has seen significant growth over the past decade and is forecasted to

continue despite its size. Continued reinvestment in existing infrastructure and ongoing development of new assets will be critical to managing growth. Emerging performers often experience increased seasonality and pressures during peak periods which places an emphasis on managing tourist flows and increasing accessibility.

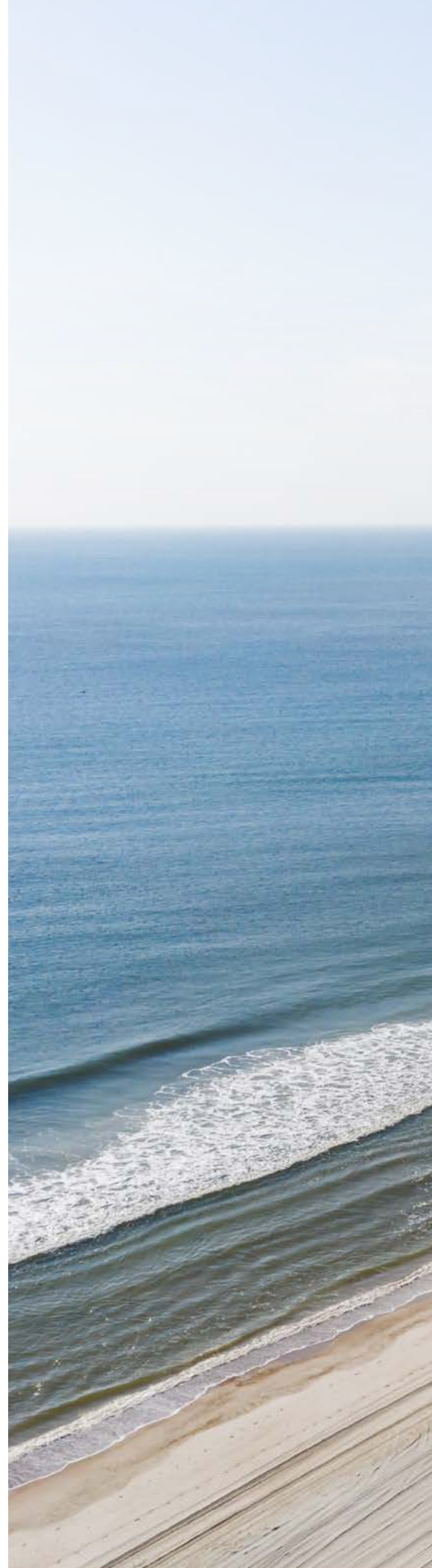
The goal of the planning process next shifted to identifying priorities and shaping recommendations that would address these combined findings and enable the destination to grow in a manageable and sustainable way.

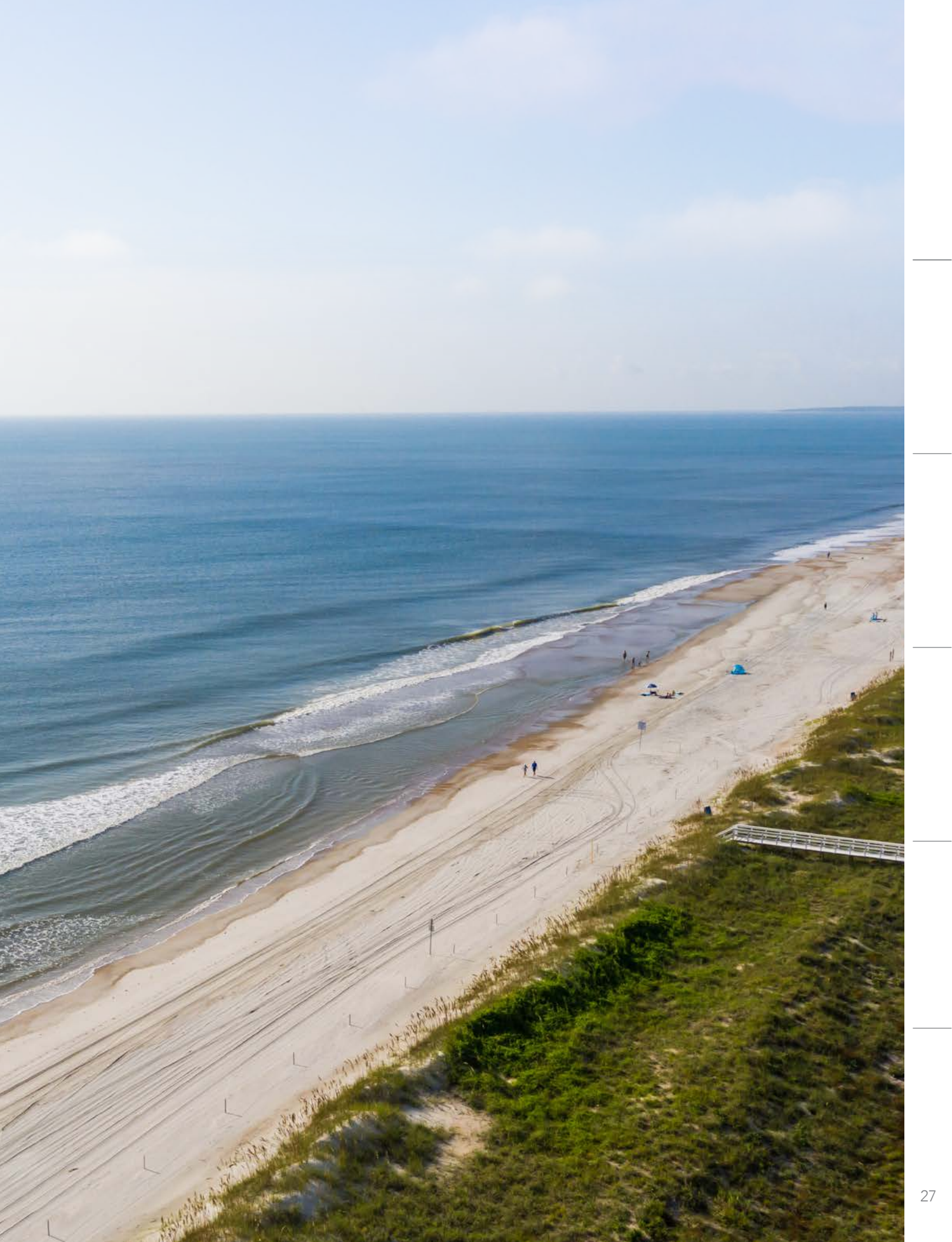
Research Conclusions

The extensive research that included broad-based stakeholder input and survey, the Demand Driver Scorecard, resident engagement, the event matrix, and the Tourism Readiness Index drew the following conclusions:

- 01 In order to achieve balance and avoid losing market share, it is crucial for Amelia Island to reinvest in maintaining a high-quality experience for both visitors and residents, despite its popularity and resilience throughout the pandemic.
- 02 Opportunities were uncovered to invest in infrastructure improvements on Amelia Island in an effort to manage high demand periods and providing a better visitor and resident experience. By establishing mainland connections and routing for key areas on the island, this will also disperse visitor activity and positively impact local businesses.
- 03 There are unique natural assets in multiple areas of the County that, with investment, can become future demand generators and contributors to the overall quality of life for residents.
- 04 The importance of broad-based collaboration between key partners (i.e., County, AITDC, Nassau Prosperity Alliance¹, and the Municipalities) must be a functioning platform for successful implementation of the Strategy.
- 05 In order to affect the overall flow of visitors throughout the County, it will be essential to extend events geographically, linking them from Amelia Island to the Mainland, where advantageous.

¹ Led by the County's Office of Strategic Advancement & Economic Resources, the Nassau Prosperity Alliance includes Nassau County Economic Development Board, Nassau County Chamber of Commerce, Amelia Island Convention and Visitors Bureau, Prosper Nassau and the Florida Small Business Development Center.





RECOMMENDATIONS AND PRIORITIES

The priorities recommended in this Destination and Community Enhancement Strategy are designed to introduce new products and experiences in strategic areas of the County, enhance current efforts on Amelia Island, and establish the framework for the County's DO, in collaboration with multiple partners, to play an integral role in strengthening the County's future as a competitive and sustainable destination. As one of the fastest growing counties in Florida, Nassau County has taken the first step, with this

strategic process, to plan for the enhancement of the visitor economy to positively impact the entire county. The outcomes of this process included ten categorical priorities, divided by geography to include Amelia Island, the Mainland, and Countywide, each with recommendations, milestone action items and areas to note that are consistent with Nassau County 2032 Vision Plan, the County's adopted Comprehensive Plan, and the BOCC's Strategic Plan.



Countywide Priorities

TWO STRATEGIES, SAME LENS

Research-Based Strategic Direction

While growth is inevitable, it's crucial to manage it effectively. This involves providing adequate resources in terms of organizational scope and appropriate funding to support the identified priorities. Consequently, the Strategy recommends expanding the scope of the Tourism Development Council Countywide, with a focus on community reinvestment and destination enhancement. This includes establishing a dedicated Mainland focus for tourism product improvement, while continuing to promote and manage Amelia Island destinations. Achieving this objective will require the AITDC to adapt and align with the priorities and outcomes of the Strategy, while remaining flexible and responsive to the challenges that accompany growth and evolution.

Recommendations

To continue to invest in the capacities of AITDC, creation of a distinct and separate product specific to the Mainland is recommended. This would involve managing both the Amelia Island product and the new Mainland product and ensuring alignment as a destination, while implementing unique strategies for growth, enhancement for Amelia Island, and marketing. This approach would preserve the destination value and brand equity established for the existing tourism market on Amelia Island, while fostering the growth of a new tourism economy on the Mainland. Brand ideation and creation could commence in the early stages, in collaboration with product development, with marketing efforts rolled out progressively as the Mainland product takes shape over multiple years.

Similar to the new dedicated brand supporting the implementation of Mainland priorities, a dedicated resource would be necessary to drive development initiatives and work with partners. The recommendation is to allocate investment toward enhancing the capabilities of Destination and Community Enhancement administration, specifically focusing on specialized development expertise. This will facilitate the support of various initiatives, ensuring continuity throughout the County. With the County's DO and Tourist Development Council providing recommendations to the BOCC on both brands and overseeing all tourism-related projects, a unified approach will be established. This oversight will create a unified approach in overseeing all tourism related projects.

Milestones

SHORT TERM (1-3 YEARS)

Passing of referendum to expand the Tourist Development Tax District will necessitate the BOCC to adjust policies and procedures, review and amend current contracts, amend current ordinances, expand the oversight responsibilities of the Tourist Development Council and, through the County's DO, restructure, reallocate resources, and expand capacities to ensure sufficient resources are assigned to successfully manage the county-wide destination.

MEDIUM TERM (3-7 YEARS)

County DO to secure the professional services of a full time Director of Tourism Development to lead initiatives and coordinate assets with partners and to facilitate advocacy, attract investment, gain developer support and provide project management. Create blueprint for Mainland destination development and marketing, and initiate progress on approved/funded projects. Finalize agreements with initial private development partners and break ground on first project. Goal for completion of five years. Create new brand and strategy for the Mainland and Countywide Marketing. Finalize list of priority projects and begin developer outreach.

LONG TERM (7-10 YEARS)

Fully establish the new destination experiences, target audience, and ongoing marketing plans.

Partners

As mentioned throughout, the Destination and Community Enhancement Strategy is a Destinationwide effort, and all priority areas have initiatives requiring partners' collaboration in order to implement and realize success across Nassau County:

BOARD OF COUNTY COMMISSIONERS ROLE

As the key oversight entity, the primary role of the BOCC is to establish an effective and functional working partnership between the Tourist Development Council and the County's DO. The Community's active involvement in recognizing the value of increased funding for tourism and their collaboration in driving new development emphasizes the need for a strong and dynamic partnership to ensure the continued effectiveness of the tourism industry. The BOCC should also provide leadership and direction regarding potential uses of new revenue, in addition to working with the AITDC to create procurement and development marketing approaches to attract private investment.

TOURIST DEVELOPMENT COUNCIL ROLE

The Destination and Community Enhancement Strategy highlights new responsibilities for AITDC. This must be strongly adopted with the required resource reallocation to ensure success. The AITDC, as an advisory body of the BOCC, will be heavily relied upon as tourism industry and community experts. This new role will be at the forefront of the successful implementation of the Strategy.



Countywide Priorities

DESTINATIONWIDE COMMUNITY ENGAGEMENT



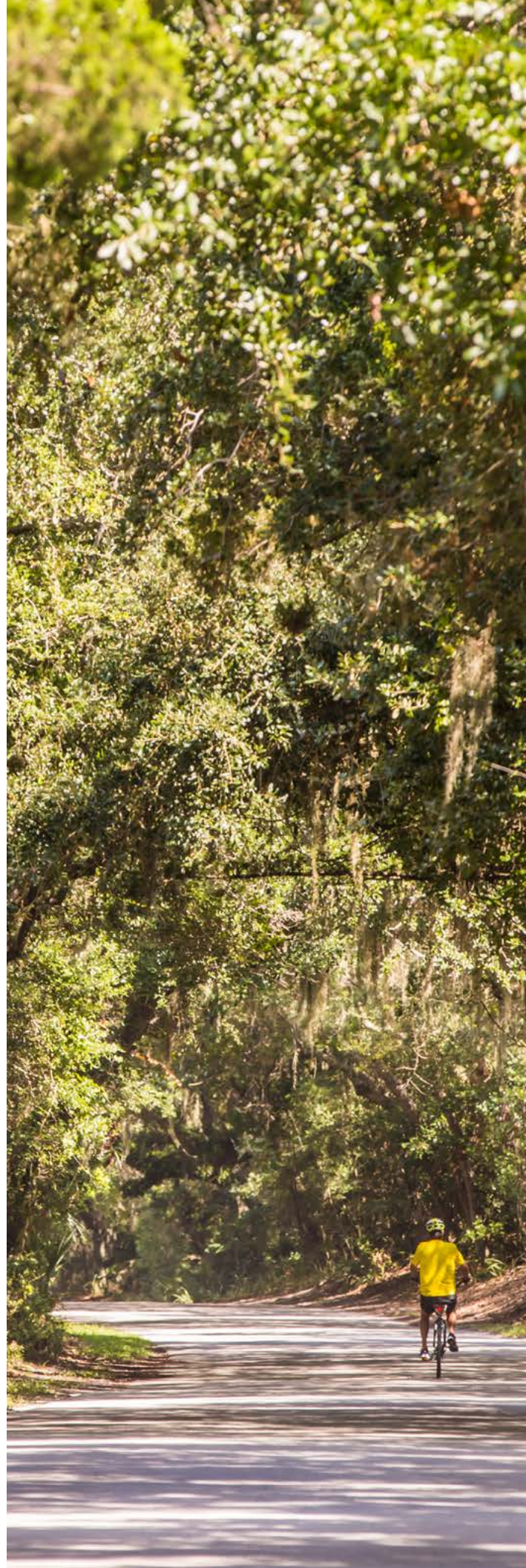


Research-Based Strategic Direction with Engagement

As the ultimate administrator of Tourism Development, the BOCC plays a pivotal role in serving as a connector for the interests of stakeholders and residents in all areas of the County. With the proposed recommendations for expansion and development of visitor product across the County, there is a need for unity that is supportive of the current visitor economy efforts and will champion broader destination enhancement goals to the benefit of the whole Community. This support is essential for the successful broad-based implementation of the Destination and Community Enhancement Strategy. This will require ongoing focused communication to raise awareness of future decisions and challenges, as well as support for new product development.

Recommendations

The BOCC, through the County's Destination Organization will need to examine the capacities of the current structure supporting community engagement. It is recommended that a professional staff member be added, with responsibility for developing a specialized communication plan and oversee the implementation of the Destination and Community Enhancement Strategy. This role would also be responsible for tracking and measuring effectiveness of the communication plan on community engagement.





Milestones

SHORT TERM (1 YEAR)

Implement a quarterly community engagement program to update and gain feedback from residents, stakeholders, local businesses, municipalities, and others including the Destination and Community Enhancement Strategy updates. Include reports from AITDC meetings along with key accomplishments and relevant metrics to reinforce the benefits of the tourism industry for all parties. Additionally, implement a measurement plan to monitor the success of the newly instituted strategy.

MEDIUM TERM (2-3 YEARS)

Implement a stakeholder survey bi-annually to measure increased awareness and understanding by the local community and to identify new opportunities for improvement and engagement. Establish a resident survey and benchmark resident perception on an annual or bi-annual basis. Finalize a reporting system with newly developed metrics to communicate effectively on overall positive tourism trends and benefits, as well as larger development accomplishments.

Partners

As mentioned throughout, the Destination and Community Enhancement Strategy is a Destinationwide community effort, and all priority areas have initiatives requiring partners' collaboration in order to implement and realize success across Nassau County:

BOCC ROLE

In all BOCC communication and through collaboration with Prosper Nassau, the County can reinforce and communicate key accomplishments, and position the AITDC as the point organization for development, workforce housing, and sustainability.

AITDC ROLE

Function as an integral partner, in collaboration with key stakeholders, to shepherd a collaborative effort addressing items impacting the tourism industry and community including development, workforce housing, and sustainability.

Countywide Priorities

DESTINATION

CONNECTIVITY



Research-Based Strategic Direction

With the BOCC serving the role of unifying entity, it will require the support of all tourism stakeholders and residents Countywide. During the initial stages of the Destination and Community Enhancement Strategy process, various focus groups were aligned in expressing a clear demand for improved transportation connectivity across the destination. Stakeholder and resident feedback, in conjunction with data conveyed by transportation agencies, confirmed the importance of increased connectivity and better island ingress and egress. The BOCC has been proactive and has formed a coalition, the Nassau Prosperity Alliance, which includes the Chamber of Commerce, the County's DO, EDB and other partners with a focus on multiple areas of opportunity including addressing mobility across the County. Lastly, there is currently a Nassau County Transit Study being conducted by the Jacksonville Transportation Authority (JTA). The research and recommendations in the JTA Transit Study will be reviewed upon completion to see if there is potential for alignment with this Strategy.

Recommendations

JLL recommends that the BOCC take on the role to advocate for the expansion and improvement of transportation options, ensuring convenient access for visitors, residents, and the workforce. Through collaboration with JTA and its current transit study, there is an opportunity to confirm the priorities established in the Strategy planning process. If the resulting recommendations of the JTA transit study concur with the findings of this Strategy, the County should consider developing additional transportation choices to meet the diverse needs of both visitors and residents. One potential option worth exploring is the feasibility of re-implementing a shuttle service on Amelia Island. This would offer convenient transportation and contribute to improved accessibility. The Citizens' Task Force for Safe Walking and Biking in Fernandina Beach has made a dedicated effort to identify enhancements for improved pedestrian and cyclist safety. As part of their short-term initiatives, they have proposed the installation of weather-resistant bicycle racks at beach access points, where feasible, to encourage cycling to the Beach. Additionally, the long-term recommendation of this Strategy involves creating pedestrian-friendly walking paths to promote walking as a mode of transportation and enhancing the overall pedestrian experience.

However lofty, an additional option to investigate is the viability of establishing alternate routes for entering and exiting the island, with the goal of reducing congestion and improving traffic flow. Lastly, the BOCC should explore the possibility of implementing satellite parking options to address parking challenges. Identifying suitable locations for satellite parking can help manage parking demand for all those commuting to Amelia Island. These recommendations provided represent only a portion of the potential options available. Other opportunities were explored in the Amelia Island Beach Access and Parking Study completed by Walker Consultants in 2022. In order to enhance destination connectivity, the ultimate goal is to thoroughly examine and explore all conceivable avenues for improving transportation within the County, while also striving to improve on-island mobility. As stated above, the integration of the enhancement strategy priorities in the current transit study is ideal in driving implementation.

Milestones

SHORT TERM (1-2 YEARS)

Immediately engage with the consultants and task force who are involved with the current transit study, to finalize options for Countywide connectivity, including measures to manage traffic flow with the current infrastructure. Determine viability of reintroducing Amelia Island Shuttle, and collaborate with the Citizens' Task Force for Safe Walking and Biking in Fernandina Beach to identify additional enhancements for improved pedestrian and cyclist safety. Communicate the outcome of the collaboration with the transit study to the AITDC. This will solidify the initiatives that will move forward in the implementation phase.

MEDIUM TERM (3-4 YEARS)

Work with the Florida Department of Transportation, AITDC, the City of Fernandina Beach, and other partners to investigate the potential for and confirm the potential return on investment for mitigation efforts that include improved bike access, satellite parking opportunities and communication strategies designed to inform the drive in visitor of the preferred mode and timing of entry onto the Island.

LONG TERM (5-7 YEARS)

Continue to work with partners named above to explore options for expansion or development of new connectivity points and stay engaged to advocate for expansion east to west in multiple phases.

Partners

All transportation priorities have initiatives that require multiple partners to collaborate in order implement and realize success across Nassau County:

BOCC ROLE

Identify and utilize existing County run/managed tourism infrastructure and expertise to facilitate the integration into the current planning process.

AITDC ROLE

As the tourism advisory board for the BOCC, provide ongoing advocacy to support needed transportation and assistance in analyzing public-private models to enhance the visitor and resident experience on Amelia Island.

CITY OF FERNANDINA BEACH

Support and provide partnership for the initiatives on Amelia Island. Determine most effective approach to participate in Amelia Island shuttle and alternate transportation planning.





Amelia Island Priorities

IMPROVEMENT OF EXISTING TOURISM PRODUCT



Research-Based Strategic Direction

Based on the research conducted using the Demand Driver Scorecard, one of the destination's principal demand drivers is the natural resources on Amelia Island. As with any popular natural resource, its overuse can degrade the quality of the visitor experience. This priority includes continued and targeted investment and care for these resources. This recommendation builds on previous studies and existing guidelines from the Beach Park Harmonization Project, which aims to enhance and better equip seven key City and County parks to serve residents and visitors alike. This project comprises short- and long-term visions and strategy for enhancement of the seven key beach parks: North Beach, Main Beach, Seaside Park, Peters Point, Burney Park, Scott Road Beach Park, and the South Beach Park. The resulting outcome will provide consistency in experience throughout the seven beach parks and continue to build upon overall improvements to Amelia Island's beach park amenities.

Additionally, the existing attractions in the historic downtown of Fernandina Beach require maintenance, management, and updates to ensure the experience remains positive. Feedback from stakeholders and City leadership noted that this has been a challenge in recent years and currently there is a risk that will continue to increase if no action is taken by the City and businesses.

Parks and recreation facilities not only enrich the lives of those in the community, but also can improve the aesthetics of neighborhoods, increase property values, generate tourism, and enhance the overall image of the County. In alignment with the County's adopted Comprehensive Plan, the County acknowledges the need to phase in parks and recreation facilities in order to keep pace with its population growth. The Parks, Recreation, and Open Space Master Plan was adopted on January 25, 2021. In collaboration with the Countywide park and recreation system, it should be used to guide the development and maintenance of County parks and recreation facilities.

Recommendations

These recommendations are made around Amelia Island's existing natural and man-made resources that currently cause the visitor to choose Nassau County. As with any progression of a destination, providing visitors with an upgraded and well-maintained experience should be considered one of the main components driving this Strategy. While we know the visitor experience on Amelia Island is sought after, it is not without room for improvement. It is recommended that coordinated investment, including the Beach Park Harmonization recommendations, be supported by this Strategy as well as allocating funds to support implementation.

Cost of Doing Nothing

Investing in infrastructure throughout the Historic Fernandina Beach, as well as surrounding areas like Old Town Historic District, and Bosque Bello, is crucial to enhance services and experiences, retain and attract the right visitors, and encourage them to explore the island. Neglecting these improvements will lead to dissatisfied visitors and residents, as well as a decline in tourism. To address this, the AITDC, in partnership with the BOCC, the City of Fernandina Beach, Fernandina Beach Main Street, and the Nassau County Prosperity Alliance, should prioritize funding for infrastructure improvements, including reinvestments such as upgrading lighting and streetscapes, and implementing new wayfinding and environmental branding. Although there is current alignment among County and City Commissions on these initiatives, with the BOCC investing funds over the last three years, a tactical plan and prioritization of needs is required. It is recommended that all parties collaborate to prioritize and fund needed improvements. Additionally, supporting the approved Shoreline Stabilization and Flood Protection project and exploring potential development of the riverwalk as an alternative experience can add to visitors' enjoyment, increase revenue for local businesses, in addition to reducing storm surge impact.

Milestones

SHORT TERM (1-3 YEARS)

Use the existing guidelines from the Beach Park Harmonization Project as a basis for enhancing and better equipping the parks, with a focus on improving the experience for residents and visitors. Assessing the current state of the parks to determine what improvements are needed, including adding a tourism lens to future improvements based on the most important opportunities. This will help to ensure that resources are allocated efficiently and effectively to address the most pressing issues first. Finalize capital improvements plan and begin initial projects. This should include establishing timelines and funding requirements in coordination with partners like the City of Fernandina Beach, Fernandina Beach Main Street, and BOCC. Additionally, reviewing design guidelines for Historic Downtown and prioritizing completion of key aesthetic and infrastructure updates is essential.

MEDIUM TERM (3-7 YEARS)

To address Historic Downtown's needs, collaboration among the City of Fernandina Beach, Fernandina Beach Main Street, BOCC, AITDC, and their respective capital improvement plans is recommended. Together, utilize the capital improvements plan to address and complete prioritized infrastructure updates. Finalize key priorities for future riverwalk experiential development.

LONG TERM (7-10 YEARS)

Complete development enhancement projects and begin exploring riverfront access for additional recreation opportunities.

Partners

As mentioned throughout, the Destination and Community Enhancement Strategy is a Destinationwide effort, and this priority area has multiple public and private partners to collaborate in order to implement and realize success across Nassau County:

BOCC ROLE

Work with AITDC, and City of Fernandina Beach to prioritize potential funding for reinvestment on Amelia Island. Support the prioritization process noted above and determine where the County can support expediting identified projects.

AITDC ROLE

Provide input related to the visitor impact and sustainability on identified priorities. Determine opportunities to advocate and stimulate progress and investment. Provide analysis where applicable to support the economic and quality of life benefit for key improvement priorities.

CITY OF FERNANDINA BEACH

Collaborate in developing the plans and resource requirements needed to complete the designated improvements between City, AITDC and the BOCC. Provide City resources and research the most effective procurement process and any additional analysis needed to finalize the recommended approach.

FERNANDINA BEACH MAIN STREET

Engage and confirm alignment with the recommended priorities. Provide support, advocacy, and constituent communication to support implementation.

Amelia Island Priorities DESTINATION AND EXPERIENCE MANAGEMENT



Research-Based Strategic Direction

During multiple stakeholder focus group sessions, two significant issues were highlighted. The first issue is the lack of transportation options available throughout Nassau County, which has caused, as an example, frustration amongst hospitality stakeholders who have taken it upon themselves to provide transportation for their guests and/or associates due to the lack of connectivity. The second issue pertains to the varying quality of experiences encountered with short-term rental properties.

These concerns raised by stakeholders are in line with the goals outlined in the County's adopted Comprehensive Plan. The recommended strategies of Vision 2032 reflect the community's priorities identified during the visioning process. One of

the essential outcomes of the plan is to redirect development to areas capable of accommodating the impacts of growth, ensuring adequate public facilities, and promoting a more mixed-use and pedestrian-friendly environment.

To address these issues, the BOCC should continue to prioritize and invest in visitor-facing infrastructure. This includes actively working toward providing better connectivity options for visitors throughout Amelia Island and supporting the effective oversight and management of short-term rentals. Resolving these priority areas will require collaboration among municipal governments, the private sector, and the AITDC to develop and implement effective solutions.

Recommendations

At the direction of the BOCC, stakeholders across the County are collaborating with Jacksonville Transportation Authority (JTA) to investigate and evaluate different means of enhancing connectivity for both visitors and residents on the island and throughout Nassau County. This could involve assessing the feasibility of expanding and creating biking lanes, constructing pedestrian trails, establishing an affordable trolley/shuttle service, implementing technology to assist in identifying available parking spaces, or even potentially collaborating with all Amelia Island destination partners to offer shuttle services. The recently completed Amelia Island Beach Access and Parking Study, completed by Walker Consultants Inc. in 2022, explored a comprehensive approach for a master plan on Amelia Island's public beach access and parking. This study presents numerous fundamental recommendations and choices. These suggestions are in harmony with and support the input and research that went into formulating the Strategy.

Efficient parking and beach access are crucial connectivity factors for both residents and visitors. Using technology to facilitate and identify parking availability will enable more efficient use of parking resources. This will also allow for proactive

communication on the best options for available parking for those accessing Amelia Island.

The last component to this priority encompasses playing a role to support the oversight and management of the short-term rental inventory to not only benefit the business owner, but also the destination, its residents, and visitors. It is recommended that the AITDC work with the City and County, to recommend updates to existing regulations as allowed by State law and exploration of a closely monitored permit system. Furthermore, it is suggested that the AITDC work in collaboration with the County to monitor and report on occupancy levels and effectively communicate any policy updates to visitors or property owners through their marketing efforts. This would enable better management of the inventory and enable the industry to positively impact the local economy, while monitoring for unintended use risks. Furthermore, the AITDC could play a role by creating marketing programs to benefit Short-Term Rental owners that comply with all municipal regulations and standards. This rewards positive behavior, while also monitoring inventory for overuse.

Milestones

SHORT TERM (1-3 YEARS)

Review recommended connectivity options based on the recent public beach access and parking study on Amelia Island, as well as the Nassau County Transit Study to determine the potential for a public and private partnership and then determine potential partners.

Launch communication plan to inform residents and visitors of

the specifics of the parking plan implementation including survey to gauge awareness. Finalize the Strategy recommendations with implementation timelines, funding strategies, and additional outreach, if needed. Review shuttle program and determine viability or potential modifications needed, in collaboration with Nassau Prosperity Alliance.

Begin exploration of a permit process for short-term vacation rentals.

MEDIUM TERM (3-7 YEARS)

Implement agreed upon parking management plan with community reporting.

LONG TERM (7-10 YEARS)

Implement the broader strategy to connect visitors around the island and advocate for a Countywide transit masterplan.





Partners

As mentioned throughout, the Destination and Community Enhancement Strategy is a Destinationwide effort and all connectivity priority areas have initiatives that require multiple partners to include the County, City of Fernandina Beach, Town of Callhan, Town of Hilliard, AITDC, Nassau Prosperity Alliance, and private transportation providers to collaborate and work together.

BOCC ROLE

Facilitate the collaboration between the municipalities, AITDC, Nassau Prosperity Alliance, and private transportation providers to determine how to establish the responsible parties depending on the proposed solution. Additionally, interface with Department of Business and Professional Regulation (DBPR) to finalize approach to short term rental permitting and monitoring.

AITDC ROLE

Advocate and provide guidance related to enhancing the visitor experience, distributing visitors and facilitating the collaboration with the private sector operators. Recommend updates to existing regulations, and collaborate with the County to monitor ridership and inform the community.

OTHER ROLES

PRIVATE TRANSPORTATION OPERATORS

Engage in stakeholder sessions to add perspective to the proposed transportation solutions and actively participate in public-private models where appropriate.

Amelia Island Priorities

HEALTH OF THE TOURISM ECONOMY



Research-Based Strategic Direction

The focus of this priority centers around improvement of the overall tourism economy. Throughout stakeholder feedback, a consistent theme that surfaced was the improvement of policy-related items. This includes the viability of businesses and support of tourism related small businesses, short-term rental policy funding implications, new parking management strategies, and workforce housing challenges. Linked closely with several of the other key issues noted in the

County's adopted Comprehensive Plan, strategic aligned economic development is another high priority issue along with several of the other key issues that are in alignment with this Strategy. While participants in the Vision 2032 process frequently cited "quality of life" as a benefit of living in Nassau County, the need for specific incentives and policies that support economic development continues to be a top priority.

Recommendations

As a result of the broad-based support and encouragement of new and ongoing small businesses, an internal review of current small business policies and the issues facing the tourism industry within the island is recommended. The impact of the pandemic has been a wakeup call within the tourism industry to the importance of small business in the overall visitor experience. By updating County and City policies to invest in and support a healthy economic ecosystem, it ensures not only the viability of businesses, but also contributes to the retention and recruitment of new businesses as part of the tourism product development process. Additional areas of policy focus encompass the financial ramifications of short-term rental policies, the difficulties surrounding workforce housing, the utilization of a parking management mechanism, the establishment of dedicated parking zones, and the utilization of app-based resources as experience management and a potential revenue generator.

JLL recommends an internal review of current business policies and the issues facing the tourism industry within the island. The expectation isn't to simply identify issues with policies, but rather to provide proactive attention to these policy-related improvements to ensure the successful growth of Nassau County's overall economic impact, maturity, and authenticity as a destination. As the County and

City prioritizes the health of the tourism economy, any business-friendly policy challenges can be addressed to help affect the retention and stimulate recruitment of small businesses. This includes the permitting and plan approval process with a focus on successful opening and ongoing support. This will complement the area's strategic growth and allow for Nassau County to compete with aspirational destinations, as demonstrated through the competitive research review. The importance of small businesses and their impact on the visitor experience and resident quality of life cannot be overstated.

In addition and in alignment with this direction, identification and recruitment of local entrepreneurs should be another outcome of this approach. A communication plan to source these up-and-coming business owners and innovators will surface new talent that will enhance the future visitor and resident experience.

The Destination and Community Enhancement Strategy acknowledges that technology-enabled development can play a larger role in Nassau County's future. Specifically with regard to short-term rental policy, any potential advancements or beneficial changes should be reviewed and thoroughly considered. JLL recommends that, where appropriate, such opportunities be accepted and implemented.

As suggested in the Walker study, it is recommended that the County and City, in collaboration with AITDC and other key partners, develop an enhanced parking management approach that will monitor the capacity of the designated parking areas. This would include inventory management coupled with an app-based platform that could inform visitors and residents of the current parking availability and suggested routes and transportation to get around the island. This will support managing visitor flow and potentially support designated satellite parking.

It is recommended that the County and City collaborate with tourism industry partners and the Nassau Prosperity Alliance to continue to address workforce housing challenges. As substantiated during the AITDC Workshop, this would allow for all industry partners to meet and come up with a list of potential solutions and how each partner could collaborate to support these solutions, such

as the Community Land Trust. An emphasis on housing development holds particular significance for hospitality workers. In addition, partners should identify current facilities that could be effectively re-purposed to support more workforce housing inventory. A potential opportunity is the development of “tiny homes.” The County is currently developing this approach as a pilot program. This type of housing development has been gaining traction in impacted areas nationally. Recent studies indicate that the popularity of tiny homes continue to rise, providing an affordable option for young professionals and key workforce positions, which helps with staffing shortages. If housing affordability is left unaddressed, these challenges could not only further add to the degradation of the visitor experience, but ultimately affect the health and quality of the tourism economy as a whole.



Milestones

SHORT TERM (1-3 YEARS)

Review of existing (small) business policies and identification of opportunities for improvement including a targeted survey of small businesses and their experiences.

Conduct further research to understand the various options or implement the most impactful approach to managed parking. Develop the priorities to manage the visitor flow, as well as the visitor experience in gaining insight on a managed parking approach.

Conduct a site review for any reuse opportunities to increase workforce housing inventory. Additionally, determine re-zoning needed to support tiny home development and test pilot program of tiny homes.

MEDIUM TERM (3-7 YEARS)

Commence implementation based on the outcomes of the short-term rental analysis and collaboration to finalize direction specifics.

LONG TERM (7-10 YEARS)

Through a targeted consistent communication effort, gain ongoing insight from multiple stakeholders on measurable success or ongoing opportunities for improvement with regards to City and County business policies.

Partners

As mentioned throughout, the Destination and Community Enhancement Strategy is a Destinationwide effort, and these priorities related to key policy areas require multiple public partners, residents, and the business community to collaborate in order to implement and realize success across Nassau County:

BOCC ROLE

Continue engaging specific partners to take part in the respective focus groups to gain insight on the effective implementation and approach to gaining support for the noted policies. Review of existing small business policies and incorporate focus group feedback to continue to invest in and support an economic healthy ecosystem.

AITDC ROLE

Participate actively in meeting with the affected constituencies and balance the visitor and resident input in the conversations with a focus on how to incorporate visitor and resident priorities.

CITY OF FERNANDINA BEACH ROLE

Review of existing small business policies and incorporate focus group feedback to continue to invest in and support an economic healthy ecosystem.

OTHER ROLES

NASSAU PROSPERITY ALLIANCE

Assist in engaging small businesses, advocating for their interests, and providing direct support to improve connectivity on the Island. Additionally, promote the inclusion of workforce housing as part of these efforts.

Amelia Island Priorities

DIGITAL MARKETING

Research-Based Strategic Direction

In an effort to support the ongoing efforts and effectiveness of the current digital marketing strategies, JLL completed a detailed digital review in collaboration with the County's DO. The assessment supported multiple outcomes and findings, the most prominent being the significant value direct email adds to Amelia Island's current digital marketing channels. The current list of engaged subscribers is roughly 50,000, with an average return on investment of 44X per email sent – demonstrating not only a noteworthy audience for this brand but also its resonance to the subscriber. Based on this performance, it is recommended to continue investing in direct email marketing by incorporating easily implementable features in order to enhance success and increase the number of subscribers.

The digital assessment conducted for Amelia Island reveals that the brand has a strong presence, and the execution of content marketing on both social media and email platforms is consistently excellent. While there is room for improvement, particularly with regard to proactively refreshing the visual branding and website, the remaining elements of Amelia Island's digital/marketing strategy help complete the picture of a much-loved destination and DO willing to try new and exciting ideas. To further enhance the brand, there are several intermediate steps that can be taken. Based on the available research outcomes, it is recommended that Amelia Island make strategic investments in its digital components to capitalize on future opportunities to realign digital assets and provide visitors with a seamless digital-to-in-market experience.

Amelia Island is currently performing well on social media, with positive engagement across multiple channels and an effective paid media strategy. However, in the ever-evolving social media landscape, there are opportunities for the brand to further enhance its reach and engagement. The brand has a strong presence on key platforms, such as Facebook and Instagram, but there is an opportunity to explore emerging social media platforms to engage new audiences and showcase the destination in unique ways. On existing platforms that boast well-executed content, there is room to build a consistent brand identity and develop a longer-term, storytelling narrative. While Instagram engagement has been declining across all industries, sentiment and ad performance are positive for Amelia Island. By continuing to monitor trends and experiment with new platforms and content strategies, Amelia Island can stay ahead of the curve and remain a leading destination for years to come.

Amelia Island's email operation stands out as the most impressive aspect of its digital marketing efforts. The DO consistently publishes attractive, on-brand emails that surpass industry benchmarks for open rates, click rates, and unsubscribes. While there is room for optimization, the engaged email list is sizable and continues to grow. However, the lack of interest segmentation for subscribers is a challenge for most organizations, and it is an area that could improve. The email template is straightforward and simple, with interesting and high-quality content that does not overwhelm readers. Overall, implementing a regular testing practice could further improve email metrics and maximize the potential of this channel as the brand expands.

Amelia Island's website currently presents the biggest opportunity for improvement and differentiation within the digital infrastructure of the DO. While the website has been updated to extend its functionality, it has started to become obsolete, and the upcoming redesign is timely. The website's major weakness is its lack of clear visual hierarchy, with multiple sections competing for attention, inconsistent spacing and layout, and a confusing menu and sitemap that can easily disorient visitors. Additionally, the current website is slow, heavy, and only partially accessible. Despite these limitations, the website still performs adequately on mobile and search. The website features an actively managed blog and a comprehensive set of travel guides, but it lacks a cohesive narrative that guides the entire user experience. There is also too much emphasis on pushing users off-site or into dry listings content.

Recommendations

The recommendations in this section are entirely related to the County's DO marketing efforts.

The recommendation here is to dedicate the majority of all marketing spend on resources to support direct marketing efforts on new target markets that were historically overlooked. While the existing budget and dedicated team are currently focused on increasing the visibility of Amelia Island through several different programs, there is room to shift to a narrower focus and targeted approach.

The Destination brand is on-target but could use a modest modernization. It is recommended that the DO consider engaging an experienced design team to refresh the look and feel of the brand image in preparation for coming investments such as the new website. It is always more effective (and more cost-effective) to start with the updated brand before designing new marketing assets, as opposed to swapping out logos and colors later on. If the DMO is serious about its new investments, this type of update is the clearest way to signal that to stakeholders and the community alike.

The existing identity has faithfully served the organization and destination for some time, and it is not our opinion that it needs to be wiped clean. A half-step, paired with a comprehensive style guide that standardizes colors and typography, will likely pay significant dividends.

With regard to the website, the DO's biggest focus should be on initiating a complete redesign, refreshing listing content and prioritizing editorial content. Outside of those main components, some secondary improvements include improving visual design, website functionality and usability – specifically with regard to opening links, calendar integrations, and translation options.

To further the success of direct marketing efforts, the additional recommendation is to improve targeted segmentation. With better data at the point of collection, they can target families, retirees, shoppers, history buffs, or any other interested groups. These targeted emails would have higher open and click rates for the recipients and would protect other subscribers from receiving irrelevant content. However, this requires a good deal of effort to properly implement and maintain – starting with the point of collection. Adding a required interest selection field to all email sign-ups will significantly decrease collection rate, but adding dedicated email sign-ups on relevant landing pages, or running targeted promotions, will allow for appropriate segmentation of relevant audiences. Additionally, the DO should continue to allocate resources to convert fly-in market potential, this includes visitors that arrive by air. This research should be leveraged to expand marketing efforts and dollars to these new markets.

Milestones

SHORT TERM (1-3 YEARS)

Explore the possibility of conducting market research for potential markets. Begin realignment of digital assets and address all “Tier 3: Easy Fixes” within the digital scorecard for each component. Details on the digital scorecard and all its tiers can be found in the appendix.

MEDIUM TERM (3-7 YEARS)

Obtain fly-in market research to expand outreach strategically. Address Tier 2: Moderate Investments within the digital scorecard for each digital component. Begin to identify plan for addressing Tier 1: Strategic Initiatives from digital scorecard.

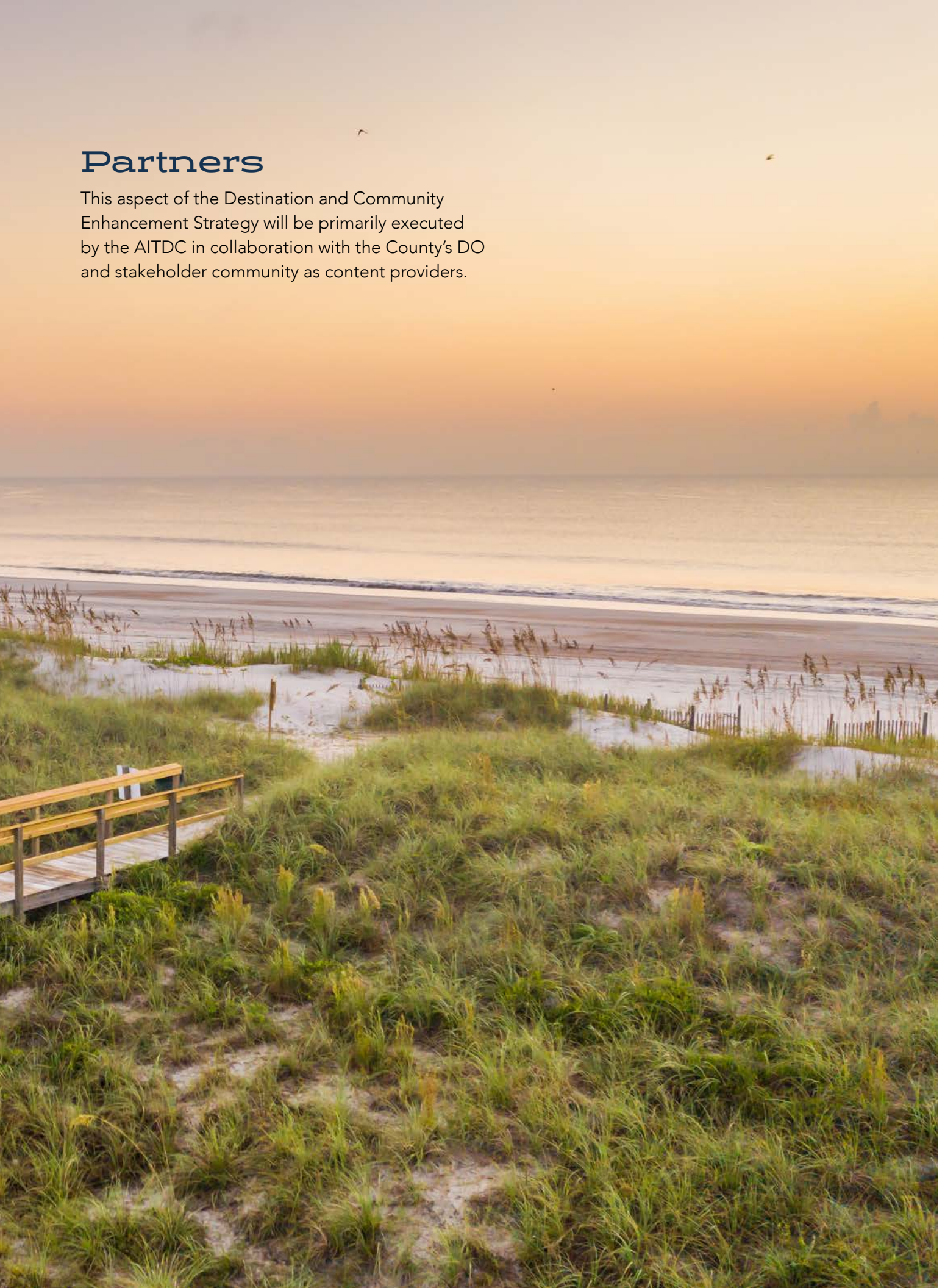
LONG TERM (7-10 YEARS)

Identify opportunities to align in-market experiences with digital experience and address Tier 1: Strategic Initiatives.



Partners

This aspect of the Destination and Community Enhancement Strategy will be primarily executed by the AITDC in collaboration with the County's DO and stakeholder community as content providers.



Mainland Priorities

TOURISM PRODUCT DEVELOPMENT





Research-Based Strategic Direction

While the beaches and the surrounding natural resources of Amelia Island have historically been the primary reason visitors have chosen Nassau County, the County would benefit from investment in tourism product on the Mainland to expand the tourism economy. The purpose of this priority is to enhance and evolve product offerings in destination assets and amenities across the County. Based on the neighboring communities and aspirational destinations studied, investment in new product will be needed to compete for leisure visitors, as well as expand its fair share of group travel to Nassau County. Just as growing communities need to upgrade and expand their transportation and utilities infrastructure, they also need to upgrade and expand their “green infrastructure” -- the network of open space, woodlands, wildlife habitat, parks and other natural areas, which sustain clean air, water, and additional natural resources that enrich their citizens’ and visitors’ quality of life. Consistent with the County’s adopted Comprehensive Plan, the goals, objectives, and policies of the Conservation, Recreation and Open Space, and Future Land Use Elements encourage the development of long-range, financially feasible plans for the identification and management of environmental resources.

Recommendations

The recommendations for tourism product development tie to several areas.

The first recommendation is to invest in the development of new outdoor recreation offerings related to ecotourism. This is a very popular and growing visitor market nationally and globally, and also aligns with the community. The desired experience includes walking or hiking trails, fishing, bird watching, and water access points for paddle sports activities. This would allow for diversified experiences for the visitor on the Mainland, while expanding the County's natural asset options which is the primary reason visitors are choosing Amelia Island today. This would not only open up new experiences in other parts of the County, it would also serve as a diversion from the beach and potentially diminish congestion on the beaches with more compelling outdoor amenities to experience. One example of this is the improvement in the overall experience when accessing the St. Mary's and Amelia Rivers. More on this opportunity is detailed on the next page.

The second recommendation is to recruit private investment to create a multi-use tournament quality sports facility for both indoor and outdoor tournaments. The recommendation of this Strategy supports the need for both indoor and outdoor facilities and would advocate for a single location to accommodate both uses, regardless of location. To confirm market demand and determine the ideal size, a feasibility study needs to be undertaken for a versatile sports tournament facility on the west side of the County, taking into account the availability of land and proximity to highway systems. During the implementation phase, it is advisable for the County to explore public-private partnership models for development. It is equally important to consider the implementation of an appropriate procurement strategy that effectively balances the requirements and actively engages private developers. The feasibility study should also consider operating and financial models, including the DO's role in sales and marketing of a future facility.





The third recommendation involves supporting the addition of new retail food and beverage experiences Countywide, enhancing the visitor experience of the destination. This would include new authentic retail food and beverage establishments, eventually leading to the creation of beer and wine trails or food tours that would encourage visitors to explore more Countywide experiences. Support for this may include incentives and process support to stimulate investment in such establishments. Existing successful owners and operators on Amelia Island and throughout the County should be encouraged to be part of this strategy to expand as anchor retail food and beverage attractions. This will require collaboration and coordination among neighboring stakeholders in Yulee, Callahan, Bryceville, and Hilliard to ensure a cohesive, authentic, and compelling visitor experience that showcases the best of Nassau County's culinary scene and compliments the local community. Furthermore, it would be beneficial to align these initiatives with the ongoing work of Prosper Nassau, the Nassau County Chamber of Commerce, as well as the Nassau County Economic Development Board. These business retention and expansion efforts would provide support to streamline procurement, entitlement, and development requirements for greater efficiency.

An example of a product development focus that has immense potential is supporting the waterfront development along the inter-coastal waterways, and St. Mary's and Amelia riverways. With its scenic weather, the destination is well-suited to embrace waterfront offerings for both visitors and residents. Improving waterfront access and stimulating new retail and restaurants would attract outdoor enthusiasts seeking an alternative to beach-centered experiences.

However, these improvements should be done in a strategic and responsible manner. Waterfront development can impact local ecosystems and habitats, which can have significant environmental consequences. It is important to identify and preserve areas of ecological significance to avoid or minimize the impact of development on these areas. Additionally, best management practices should be implemented to mitigate potential impacts and protect the health of water bodies and surrounding ecosystems. Waterfront development should prioritize sustainable practices, such as the use of green infrastructure, renewable energy, and low-impact development techniques. This can help reduce environmental impacts and ensure long-term sustainability, ultimately preserving the area's natural beauty. Moreover, providing amenities such as parking, restrooms, a boardwalk, etc. would also offer visitors enhanced conveniences to support spending additional time in the area and be a component of a multiple day stay. Most important, these initiatives also stand to benefit the quality of life for residents including more water access, entertainment, and newer facilities. A great example being Tributary Park in Yulee, which serves as an asset to residents and visitors alike.

The final recommendation in the Mainland's 10-year strategy focuses on hotel product development. This entails identifying potential lodging options that align with the unique features and current businesses. A cohesive strategy is essential to add authentic hotel products that cater to the evolving needs of the destination, align with the desired service level, and are reflective of the local community. In order to attract investment, it will be crucial to reach out to local and other hotel developers during the development process, while also managing collective interests to ensure the proper placement of future products.

Milestones

SHORT TERM (1-3 YEARS)

Identify available land for tourism product development, with specific focus on a sports facility, riverfront enhancement, and outdoor recreation experiences. Consider creation of tourism product development incentive for private sector partners. Develop the approach to encourage investment by local unique food and beverage and retail owners and operators. Incorporate the Event Matrix, utilized in the Market Research portion of this Strategy, as the platform for determining current and future events that warrant strategic County investment. Identify the "top" strategically aligned projects and proactively reach out to private sector partners.

MEDIUM TERM (3-7 YEARS)

Prioritize key projects for product development and engage private sector partners - where possible - in concurrent tourism product development initiatives. Release formal outreach to hotel development community to test the interest and key considerations for developing new lodging properties. The goal is to have identified and secured multiple projects that would attract private investments and incorporate strategies to attract investment.

LONG TERM (7-10 YEARS)

Facilitate development of tourism product expansion in additional phases. Secure development in the designated focus areas and manage interest accordingly.





Partners

As mentioned throughout, the Destination and Community Enhancement Strategy is a Destinationwide effort, and all priority areas have product development initiatives that require multiple partners to collaborate in order to implement and realize success across Nassau County:

BOCC ROLE

Collaborate to identify suitable locations and generate interest from potential developers, with an emphasis on local owners and operators, for various developments including retail, restaurants, sports facilities, and lodging. The County should play a facilitating and collaborative role alongside the AITDC to support feasibility studies for future enhancements. Additionally, the County should actively seek available resources and initiatives to bolster product and experiential development, hotel projects, and infrastructure initiatives. It is equally important to evaluate opportunities for streamlining the development process to attract new partners and expedite progress.

AITDC ROLE

Act as the facilitator in finalizing the investment priorities in collaboration with the County and other key partners. Participate in implementation by identifying tourism partner(s) in the private sector with interest and capacity to develop new projects. Organize and develop content of existing Countywide offerings or capabilities to offer to visitors. Work with the County to raise broader awareness within the development community of the Strategy priorities and support ongoing communication and engagement.





OTHER ROLES

ATTRACTION PARTNERS

(Includes local leadership at attractions, outdoor recreation, and restaurants)

Engage in recommending specific opportunities within the Strategy priorities. Identify partner(s) in the private sector with interest and capacity to scale new aligned projects.

EVENT PARTNERS

(Includes event organizers and funding partners)

Identify partner(s) in the private sector with interest and capacity to scale current and new events for implementation. Engage in using the Event Matrix as the platform for determining current and future events that warrant investment. Support the development of a Countywide “internal” calendar to coordinate priorities with AITDC.

SPORTS PARTNERS

(Includes private sports operators, organizers, and developers as funding partners)

Engage in market demand and facility parameters to support the highest impact venue or venues to support sports tourism. Identify sports partners, operators, organizers in the private sports sector with interest and capacity to participate as a private investor. Collaborate with County on the most advantageous sales and marketing collaboration.

LODGING PARTNERS

(Includes hotel developers and operators as funding and strategic partners)

Collaborate with AITDC on hotel industry studies to determine strategic development priorities. Identify hospitality industry partner(s) in the private sector in targeted hotel and lodging offerings with interest in investing in the County.

MUNICIPALITIES

Collaborate with the leadership of the local municipalities to identify an inclusive plan of action for implementation.

NASSAU PROSPERITY ALLIANCE

Partner to identify potential opportunities and collaborate to ensure that all processes, from procurement to development, are executed efficiently, promoting fairness and accessibility. Focus areas include mainland tourism industry development, business directory, and transportation study implementation.

Mainland Priorities

EXPANSION OF FUNDING SOURCES





Countywide Tourism Development Tax

As mentioned in this Strategy, it is recommended to initiate a well-coordinated inclusive endeavor to extend the Tourist Development Tax (TDT) to encompass all of Nassau County. This would necessitate a referendum as early as 2024 and would result in acquiring fresh resources to support the outlined Mainland priorities and other potential opportunities throughout the County. After conducting a comprehensive review, it has been concluded that implementing a focused investment plan is crucial and holds potential for greatly improving the overall tourism experience and positively influencing the quality of life for all residents of Nassau County through tourism-driven community reinvestment. These resources can be effectively utilized to encourage private contributions and generate additional public funding.

Research-Based Strategic Direction

In accordance with 125.0104, Fla. Stat. (2012), Local Option Tourist Development Act, all tax revenues received pursuant to this section by a county imposing the tourist development tax shall be used by that county for funding of specified tourism related efforts. The AITDC is the designated steward of the TDT collected and reports to the Board of County Commissioners. This model has been highly successful and the role of AITDC as the liaison to the industry, as well as the marketing organization for Amelia Island on the eastern part of the County, has been critical to that success. Through research and engagement, including presentations and discussions with the Hilliard and Callahan Town Councils, as well as drawing from industry best practices, it is evident that centralizing TDT funding is of utmost importance. The engagement with the Hilliard and Callahan Town Councils surfaced the importance of collaboration and authenticity. This centralization ensures effective collaboration and coordination, ultimately maximizing the County's return on investment. The expanded focus of this Strategy demonstrates that all new TDT Countywide funds should have priorities for investment and development on the Mainland and will need to be broadly vetted, including the local community, to confirm that the proposed uses and investments create the highest ROI from a tourism perspective as well as enhance the quality of life for Nassau County residents.

Recommendations

The recommendation to the County, in collaboration with the AITDC, is to continue the community education and introduce a ballot measure as referendum as early as November 2024 to expand TDT collection for all hotel, lodging, and short-term rental accommodations in Nassau County at the current rate. Additionally, establish an agreed upon set of priorities based on the tourism strategy and finalize the criteria to determine future funding decisions on the Mainland. The priorities will ensure approved projects are in alignment with Destination and Community Enhancement Strategy and will be developed for the overall benefit of the tourism industry and existing residents in Nassau County.

The following are examples of expanded TDT fund uses:

- » New public access points to the St. Marys River and other bodies of water
- » Enhanced public parks and sports facilities
- » Additional publicly accessible multi-use trail, nature walks and gathering spaces
- » Opportunity to attend entertainment events or dine at new restaurants
- » Tourism product feasibility studies
- » Attracting tourism development public/private partnership
- » Target incentives for private sector tourism investment
- » Enhance bonding capacity for future tourism asset development
- » Provide infrastructure to support connectivity between assets

The recommendation of this Strategy is to ensure Mainland collections are dedicated to investing in tourism product before resources are allocated to marketing. The BOCC will determine the most advantageous use of the incremental funds. It is recommended that the BOCC continue the practice of collections being primarily reinvested on Amelia Island and for existing tourism marketing. It is recommended that existing tourism marketing funds are not diverted to other efforts due to the increasingly competitive nature of the tourism economy. This will ensure that resources are available to attract and retain the target audiences that will continue to support the success of the current industry.

As a starting point, and to better align the investment Nassau County and the Tourism Development Council are making in the area's tourism infrastructure, it is recommended that the County adopt the tourism product development categories identified previously for future funding tourism product initiatives. Through the adoption of said categories, it will enable strategic prioritization of support for projects with the potential to impact the diversification of the visitor experience most positively throughout the County.

Aligning with the strategic goals, objectives, and priorities of the Destination and Community Enhancement Strategy will ensure all tourism initiatives support Countywide tourism goals and strengthen its tourism product.

Milestones

SHORT TERM (1-3 YEARS)

Support the identified efforts for incremental investment into tourism product development. Build TDT policy for incentives and future allocations. Develop a budget and roadmap to continue the current sustainable marketing plan and recommended strategies to support the newly established development priorities. Finalize the initial targeted projects.

MEDIUM TERM (3-5 YEARS)

Collaborate with the affected communities and lead the community engagement plan to inform residents and stakeholders of the future Strategy enhancements. Break ground on the initial priorities with public/private investment model.

LONG TERM (5-7 YEARS)

Position the DO as the strategic marketing partner to support new investment and promote new products and experiences as they come on-line.

Partners

Enhancing the overall revenues streams to support tourism diversification requires multiple partners to collaborate in order to implement and realize success across Nassau County:

BOCC ROLE

Provide the community the facts related to tourism and support the County's DO, who will lead the communication and advocacy for the expansion of the TDT. Oversee the Strategy implementation to confirm the priorities outlined in the Destination and Community Enhancement Strategy are the core criteria for the utilization of the available funds.

COUNTY DO ROLE

Lead the community engagement plan and advocacy efforts for the expansion of the TDT. Lead stakeholder and resident engagement to inform them of the Strategy priorities and importance of an expanded TDT for successful implementation. Additionally, as programs, venues, or products are funded and created, develop a comprehensive approach to support the owners' and operators' success through focused marketing.



Mainland Priorities

LEVERAGING EVENT STRATEGY





Research-Based Strategic Direction

According to the research conducted, tourism events are a cornerstone of travel motivation when choosing a destination. It is critical for the future of the County to continue to evolve its event strategy and extend it Countywide. It was determined that the existing event landscape is limited as to the number of events that drive overnight stays and support the tourism industry. The purpose of this priority is to evolve existing events or curate new events by leveraging current or new assets that drive or have the potential to drive overnight visitation and enhance quality of life of locals by scaling and developing the events to attract broader target audiences. Additionally, provide more targeted support to the new AITDC Sponsorship Funding Policy with the introduction of the Event Matrix as the evaluation criteria to standardize and focus the process.

Recommendations

The first recommendation for this priority revolves around the use of existing sports infrastructure and re-imagining how sports event users are targeted. The long-term strategy is to plan for building a new multi-use sports or tournament-level facility. In the meantime, attracting these types of users by packaging existing assets and experiences would be useful in building Nassau County's reputation in this space. The County's DO has started implementation of this recommendation and has seen great success and future potential.

The second recommendation relates to the natural evolution of testing the expansion of existing leisure events and generating new events to impact the Mainland. The notable success of signature events on Amelia Island such as The Amelia (Concours d'Elegance), Dickens on Centre, and the Amelia Island Chamber Music Festival, could be further expanded Countywide by developing parallel Mainland events. To achieve this size and scale, it would be necessary to be proactive in collaborating with event organizers to strategize on approach and evaluation of investment value and overall ability to drive overnight visitation for future events. This would not only achieve the objective of increasing the event's success and offer attendees a chance to explore the County further, but it would also be a crucial first step in creating tourism opportunities on the Mainland. While this recommendation is contingent upon the implementation of other recommendations in this Strategy, such as tourism product development,

improvement of existing product, destination and experience management, and destination connectivity, this recommendation can begin incrementally using strategic existing assets. JLL's recommendation is to review current tourism infrastructure, in parallel with identifying current signature events that can begin to adopt this new event strategy. In addition to the existing Fairgrounds there is available land on the Mainland that would lend itself to large scale events. JLL introduced the Event Matrix aimed at refining the evaluation process for future and existing events. Its objective is to establish a comprehensive set of criteria that event organizers can use when applying for event permits and seeking support. JLL recommends that the customized matrix be used with all event permitting processes through the municipalities and County. The underlying purpose being to provide support and guidance to organizers as they grow and develop their events. A sample Event Matrix is located in the appendix.



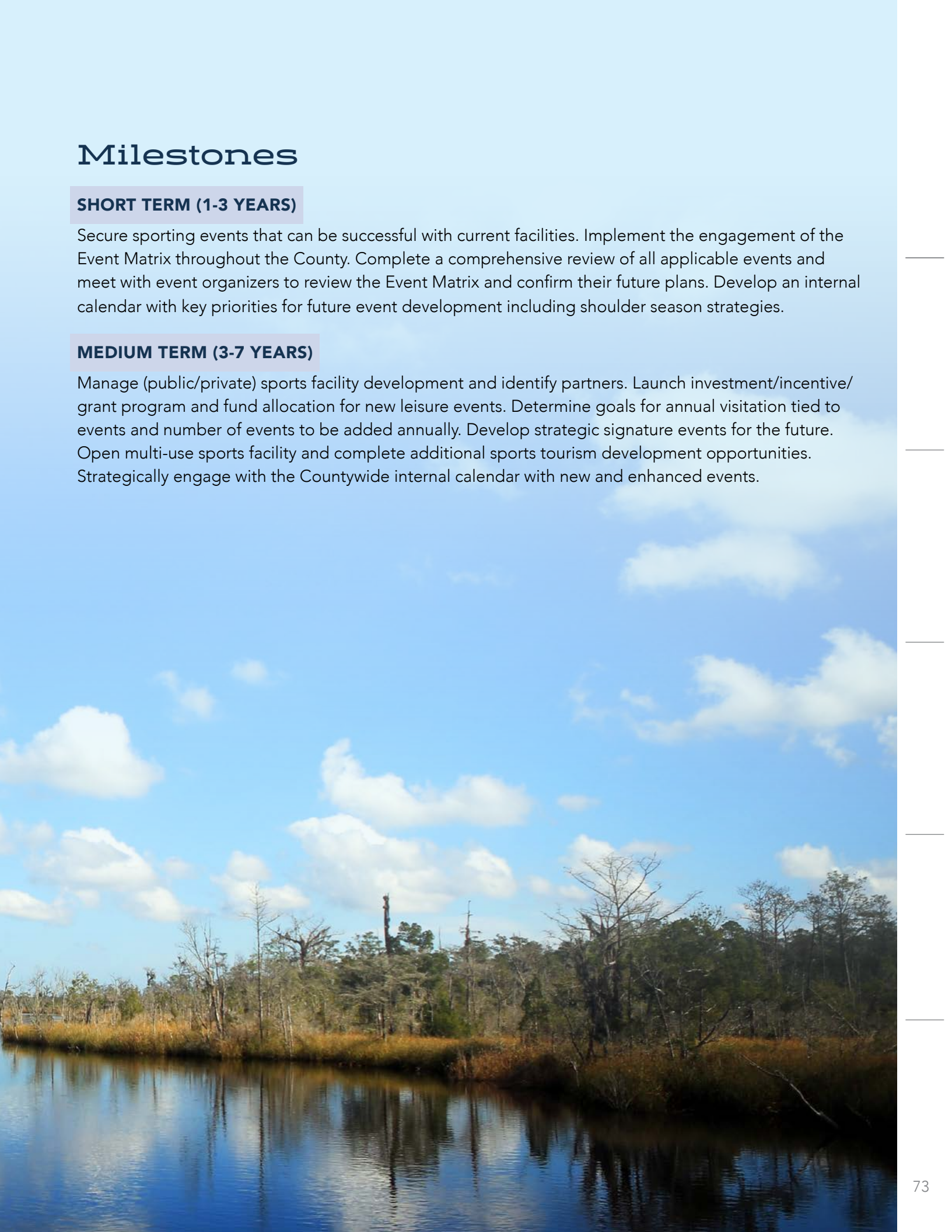
Milestones

SHORT TERM (1-3 YEARS)

Secure sporting events that can be successful with current facilities. Implement the engagement of the Event Matrix throughout the County. Complete a comprehensive review of all applicable events and meet with event organizers to review the Event Matrix and confirm their future plans. Develop an internal calendar with key priorities for future event development including shoulder season strategies.

MEDIUM TERM (3-7 YEARS)

Manage (public/private) sports facility development and identify partners. Launch investment/incentive/grant program and fund allocation for new leisure events. Determine goals for annual visitation tied to events and number of events to be added annually. Develop strategic signature events for the future. Open multi-use sports facility and complete additional sports tourism development opportunities. Strategically engage with the Countywide internal calendar with new and enhanced events.



Partners

The event development process, as well as the sports venue development, requires multiple partners, including the BOCC, AITDC, the County's DMO, Event Organizers, and Municipalities to collaborate in order implement and realize success across Nassau County:

BOCC ROLE

Support the adoption of the Event Matrix as a recognized evaluation tool for all permitted events. Identify and utilize existing County run/managed tourism venues and infrastructure to facilitate Mainland event expansion.

AITDC ROLE

Work with the BOCC to identify existing tourism infrastructure to provide event organizers with potential new opportunities to expand events around the County, starting with signature events. Adopt the Event Matrix as a scoring mechanism to standardize the process for the Sponsorship Funding Policy. Continue ongoing engagement and support of event organizers to facilitate event development, where appropriate. Additionally, work with existing sports facility leadership to identify new approaches for packaging existing assets and experiences to target new sports event organizers and participants.

OTHER ROLES

EVENT ORGANIZERS

Collaborate with AITDC and participate in AITDC-sponsored forums. Complete the Event Matrix assessment and determine next steps for their events, where applicable.

MUNICIPALITIES

Adopt the Event Matrix as part of the event development and permitting process. Participate in the calendar development with AITDC to coordinate the Countywide approach, maximize time frames, and event collaboration where possible.

SPORTS PARTNERS

Review existing event user types, as well as current assets and experiences to determine opportunities for sports event diversification. Work with the County's DMO to identify new approaches for packaging existing assets and experience to target new sports event users.





CONCLUSION

Over the next decade, Nassau County possesses a distinctive advantage in fulfilling the shared aspirations of its residents and the tourism and hospitality sector. With the alluring appeal and established popularity of Amelia Island, coupled with the transformative prospects on the Mainland, a remarkable opportunity emerges for extensive cooperation and sustained triumph. The recommended priorities not only reinforce the connection and significance of current resources but also pave the way for strategic investments and new developments.

Developing a Comprehensive Community Enhancement Strategy for Nassau County, aimed at enhancing its appeal as both a visitor destination and an exceptional place to live, is a complex and challenging process. The active involvement of numerous stakeholders, partners, elected officials, AITDC, County DMO, and others who have actively participated in the planning process for the past eighteen months demonstrates the community's readiness and willingness to engage and support this endeavor. Sustaining this high level of engagement will be crucial for achieving continued success. JLL extends its gratitude to the over seven hundred participants, many of whom had multiple meetings or interviews, for their insightful and passionate input throughout the process.

This Strategy endeavors to create a progressive balance between the important economic contribution of Nassau County's tourism industry and a focused effort to enhance the quality of life for all residents in all areas of the County. The process and broad-based engagement have revealed the potential for a forward-looking approach that advances both essential aspects. It is feasible to simultaneously address demand management and enhance the visitor experience while continuing to improve the overall quality of life for residents. Furthermore, with the focus on the future and extending tourism tax collection to encompass all areas of the County, the Strategy advocates for a development approach that emphasizes product and experiential enhancements, acknowledging the significance of preserving the County's heritage and distinctive environments. Simultaneously recommending the introduction of coordinated initiatives to celebrate the County's natural resources and other unique attributes.

A successful tourism economy in Nassau County can bring several economic and quality of life benefits to residents. It creates job opportunities across various sectors and also supports local businesses that are authentic to Nassau County. Expanding the TDT can lead to the preservation and promotion of local traditions, heritage sites, and cultural events.

Nassau County visitors also support the development of recreational facilities and amenities to accommodate visitors, which locals can also enjoy.

With all of the components that are proposed, the focus now shifts to implementing the recommendations of the Destination and Community Enhancement Strategy. With the AITDC at the helm of this Strategy as convener and facilitator, and the Board of County Commissioners as overarching leaders, along with the many partners named throughout the priorities, Nassau County is primed for success going forward.



Destination and Community Enhancement Strategy Overview

Countywide:

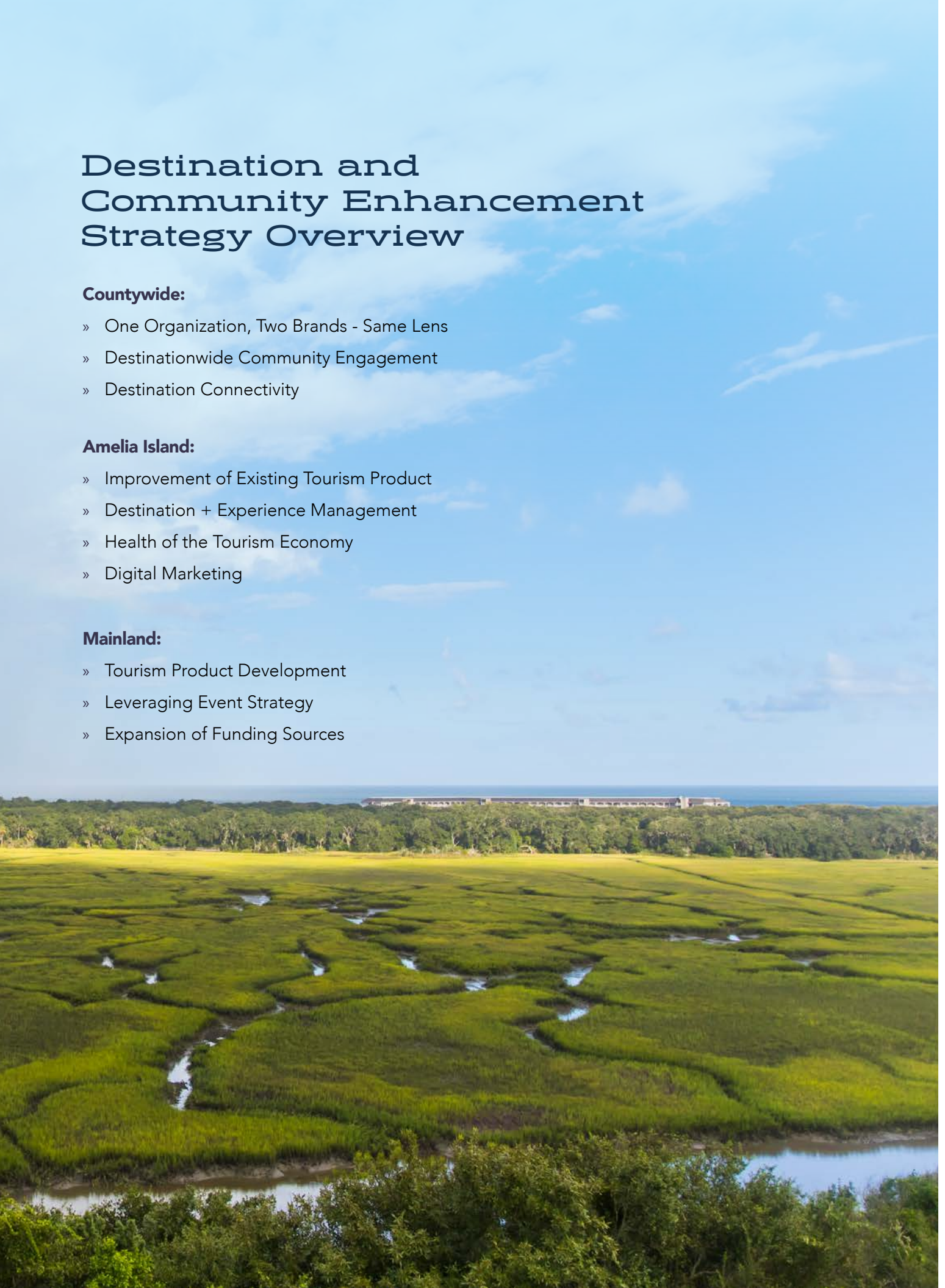
- » One Organization, Two Brands - Same Lens
- » Destinationwide Community Engagement
- » Destination Connectivity

Amelia Island:

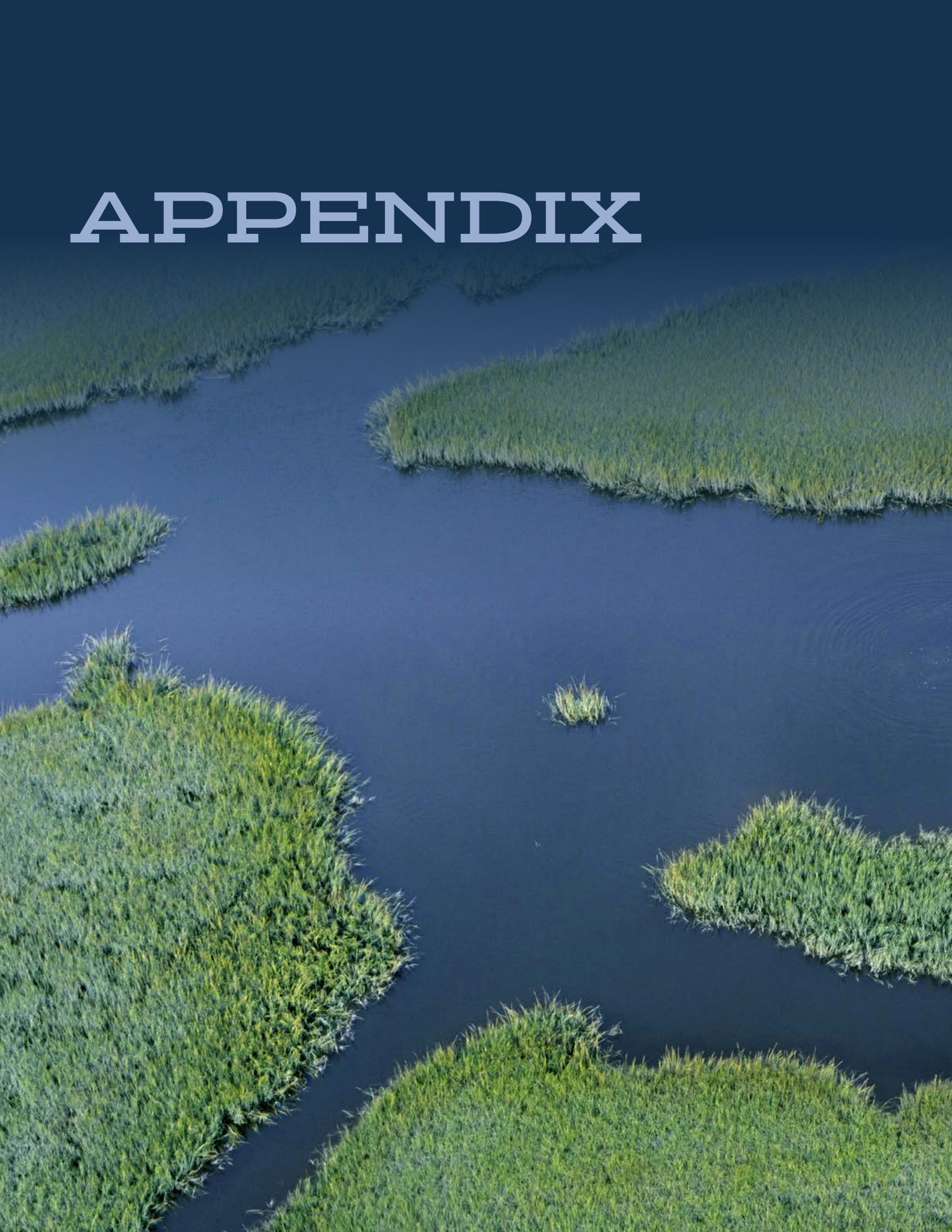
- » Improvement of Existing Tourism Product
- » Destination + Experience Management
- » Health of the Tourism Economy
- » Digital Marketing

Mainland:

- » Tourism Product Development
- » Leveraging Event Strategy
- » Expansion of Funding Sources



APPENDIX





Demand Driver Score Card template

Process - Multi-step assessment of destination assets.

1

Utilize visitor traffic and flow data to assess current demand

2

Place individual assets on scale based on eight criteria to score

3

Rate anything that is a 6-7 or greater as Greenville's Attractors

4

Utilize the outcome to identify future competitive position

5

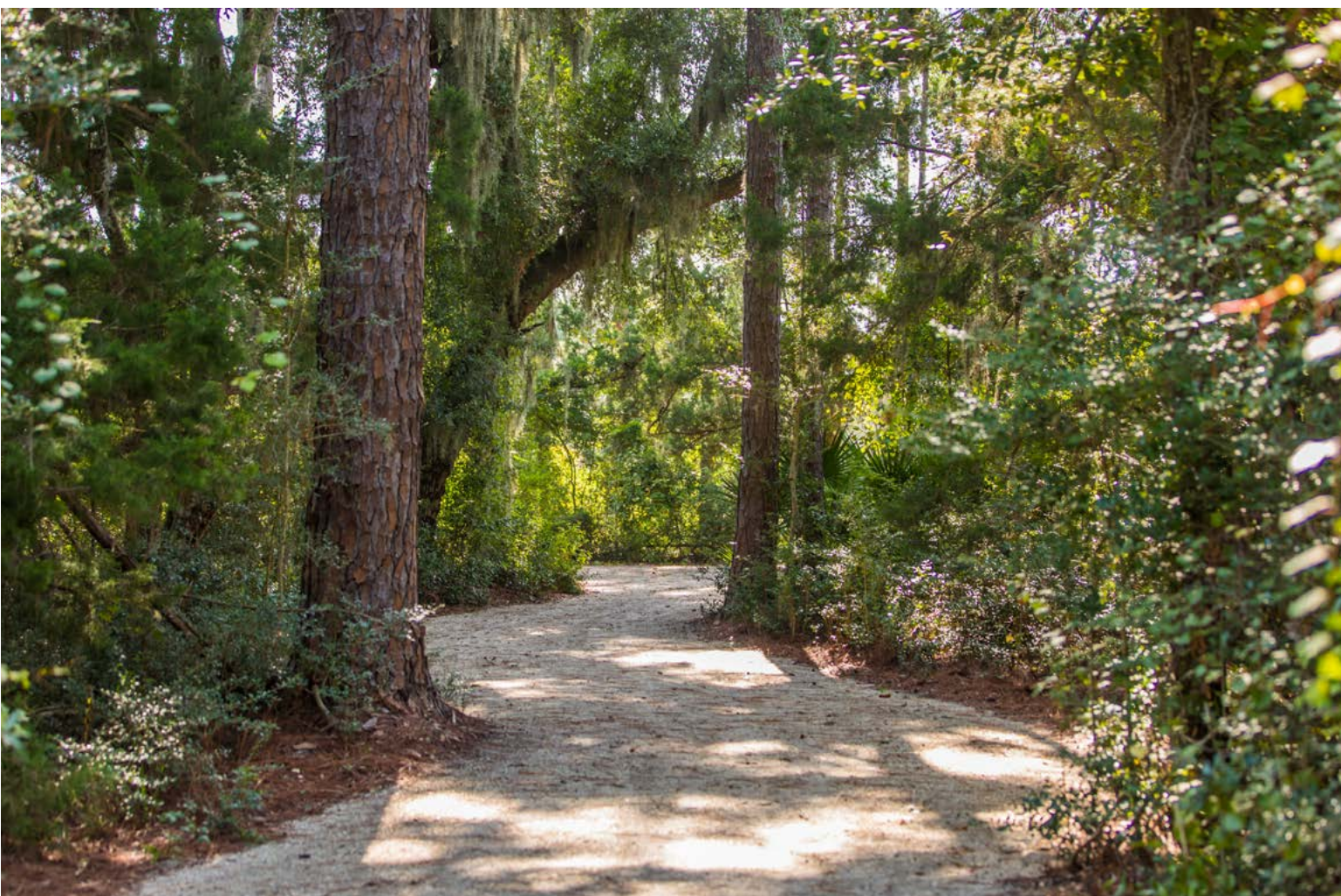
Recommend new investment or enhancement to grow assets on the scale

Score Card Elements

Item	Definition	Max Point Value
One of a Kind	Captivating content or collections that drives interest and appeal. Proximity of alternative similar offerings can be a factor in overall uniqueness	25
Iconic Scale	Dramatic visual prompting a curiosity powerful enough to inspire a visit (Instagram worthy- trying to capture a moment)	20
Engaging Visitor Experience	Interaction between the guest and the attraction	15
Current Visitor Demand	Level of visitor traffic, reviews, etc. to the asset currently	15
Event Opportunities	Programming temporal, catalytic events	10
Venue Capabilities	Easily transformed and adapted to host various functions	5
Identified Target Audience(s)	Multiple target audience and visitor types can be targeted based on overall connectivity	5
Future Unique Development	Upcoming additions or plan initiatives that elevate potential	5

Score Card: Eiffel Tower Sample Scoring

Item	Definition	Score	Max Point Value
One of a Kind	Captivating content or collections that drives interest and appeal. Proximity of alternative similar offerings can be a factor in overall uniqueness	25	25
Iconic Scale	Dramatic visual prompting a curiosity powerful enough to inspire a visit (Instagram worthy- trying to capture a moment)	20	20
Engaging Visitor Experience	Interaction between the guest and the attraction	15	15
Current Visitor Demand	Level of visitor traffic, reviews, etc. to the asset currently	15	15
Event Opportunities	Programming temporal, catalytic events	10	10
Venue Capabilities	Easily transformed and adapted to host various functions	5	5
Identified Target Audience(s)	Multiple target audience and visitor types can be targeted based on overall connectivity	5	5
Future Unique Development	Upcoming additions or plan initiatives that elevate potential	5	5



Event Matrix

Purpose – Utilize criteria that cause events to drive return to understand the current landscape of events generating the desired outcome AND position VGSC to support up and coming events to be successful

1

Identify key events serviced by VGSC

2

Rate event on matrix using 13 criteria

3

Identify those events that can grow in specific areas through matrix outcomes

4

Work with organizers on tactics for implementation

Program Components

- Tourism Promotion
- Benefit to the Brand
- Innovation | Uniqueness
- Evidence of Partnerships
- Organizational Structure and Management Capabilities
- Economic Impact
- Suitable Target Markets
- Comprehensive Marketing Plan
- Overnight Visitors (Room Nights)
- Scale of Project
- BONUS - Time of Year | Need Period

Sample Event Outcomes

	Fail	Poor	Average	Above Average	Excellent	Total Points Awarded
Point Allocation Maximum = 5 points per component	1	2	3	4	5	65 MAX
Program Components						
1. Tourism Promotion						5
2. Benefit to the Brand						5
3. Innovation Uniqueness						5
4. Evidence of Partnerships						5
5. Organizational Structure and Management Capabilities						5
6. Economic Impact						5
7. Suitable Target Markets						5
8. Comprehensive Marketing Plan						5
9. Overnight Visitors (Room Nights)						5
10. Scale of Project						5
BONUS - Time of Year Need Period						5
Total Maximum possible points = 65						65

Global Destinations' Readiness For Sustainable Tourism

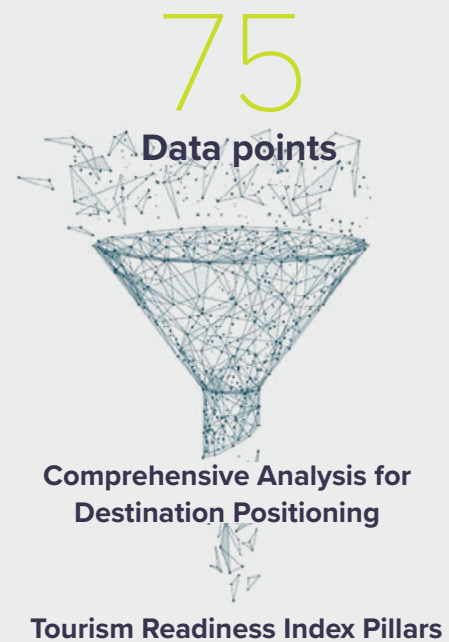
- Tourism Readiness Index is the product of a partnership between JLL and the World Travel & Tourism Council (WTTC) to assess global cities' tourism readiness.
- While readiness will depend on the ambitions and goals of every city, WTTC & JLL define tourism readiness as a strategic and all-inclusive approach that proactively addresses and implements factors and policies relating to scale, concentration, leisure and business offerings, environmental and urban readiness, safety & security as well as the prioritization of tourism.
- Indeed, no two destinations are better or the same and, as such, the challenges they will face, and the opportunities to unlock their tourism potential, will differ.
- However, commonalities can be identified to provide a framework through which cities can assess their context and plan for the future.

Tourism Readiness Index

- Comprehensive analysis addresses what makes a destination ready for sustainable Travel & Tourism.
- Assess current positioning and ability to manage growth
- **Indicators** | 75 data points across all facets of the tourism economy
- **Outcomes** | eight (8) pillars and five (5) destination typologies



*Globally recognized tool
validated by over 100 domestic
and international destinations +
World Travel & Tourism Council*



- | | |
|----------------------------|--------------------------|
| 1. Scale | 5. Concentration |
| 2. Leisure | 6. Business |
| 3. Environmental readiness | 7. Urban readiness |
| 4. Safety and security | 8. Policy prioritization |

Levels of readiness | Destination typologies

Dawning Developers	Emerging Performers	Balanced Dynamics	Mature Performers	Managing Momentum
Limited tourism infrastructure	Growing momentum	Established infrastructure	Strong leisure and/or business travel dynamics	Historically high growth momentum
Gradual tourism growth	Rising infrastructure	Growth in business and leisure paces with scale	Established tourism infrastructure	Aging or strained tourism infrastructure
Opportunities ahead with planning	Opportunities for strategic development	Equalized scale and concentration	Proactively manage pressures & capacity building	Feeling the pressures of scale & concentration
	Smaller scale – may experience pressures			

Weights by Pillar



NASSAU COUNTY

