



WORLD GOLF VILLAGE PROPERTIES:

Long-Term Vision





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INTRODUCTION

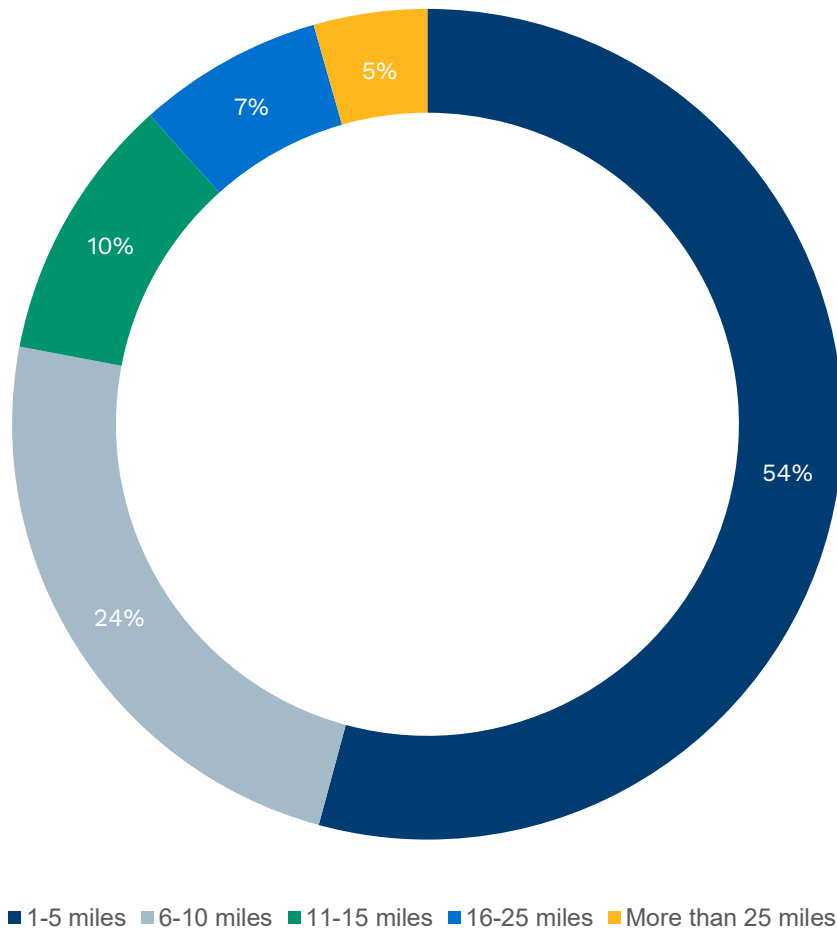
In June 2023, the World Golf Foundation notified St. Johns County (SJC) of its intention to move the World Golf Hall of Fame and the World Golf Hall of Fame IMAX theater out of the World Golf Village, and to relocate the PGA Tour Productions to a new building on the Global Home Campus. These departures and relocations provide a turning point for the SJC community, offering a unique opportunity to shape the development of these properties that align with the community’s vision and needs.

As part of this redevelopment process, SJC conducted a campaign to engage the public to gather feedback on the future of these properties. These outreach efforts included an online survey and two public meetings, where stakeholders were invited to share their ideas and proposals for the WGV. This report will present an analysis of the findings of the survey and sentiments expressed at the public meetings, and present recommendations for these properties. This analysis aims to provide insights to transform these properties into vibrant spaces that will contribute to the economic, social, and cultural fabric of SJC.

SURVEY RESULTS

The online survey was conducted from July to September 2023. In total, more than 4,900 respondents participated in the survey. Most participants were SJC residents, representing over 90% of responses. The majority live proximate to the WGV, with over 50% living between one and five miles from the site.

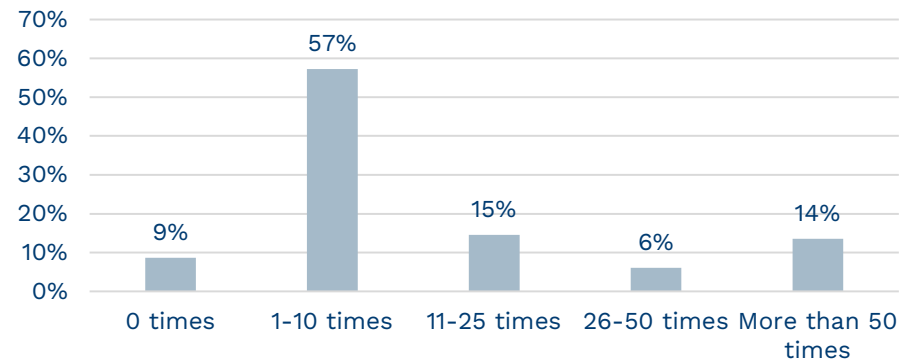
Figure 1: Distance from respondents' residences to the WGV.



Current Space Usage and Experience

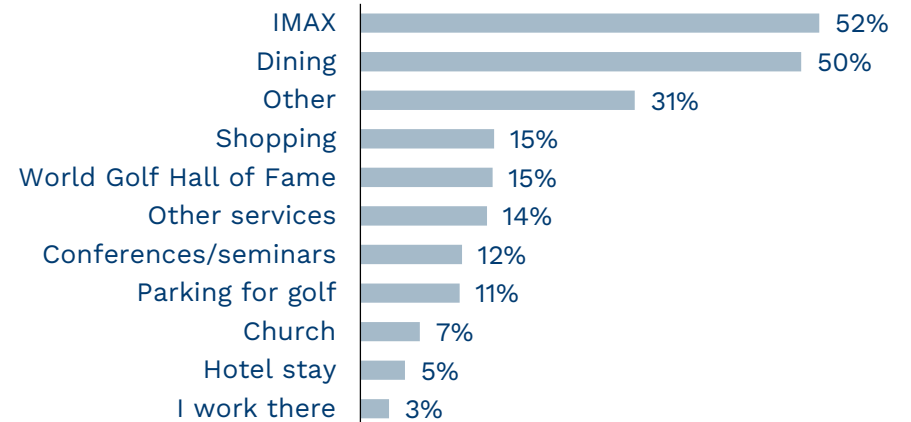
In the last year, most participants report visiting the WGV between 1 and 10 times. Notably, 14% of participants reported visiting more than 50 times, while 9% report not visiting the WGV at all.

Figure 2: WGV visitation in the last year.



Respondents visited the WGV for a variety of reasons, with IMAX and dining being the most frequently cited activities. Almost one-third of respondents reported visiting for other reasons.

Figure 3: Reasons for visiting the WGV.



The other reasons can be separated out into three categories: 1) Business, Retail & Amenities; 2) Residential or Employment; 3) Community Events or Services. Further insight into the different activities can be found below.

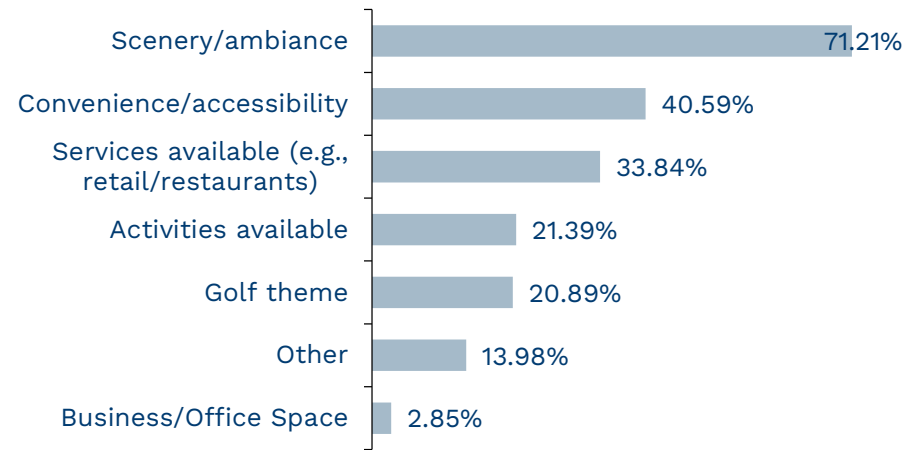
Figure 4: “Other” reasons respondents visited the WGV.

<i>Business, Retail, and Amenities</i>	<i>Residential or Employment</i>	<i>Community Events or Services</i>
Using a retail or services (e.g. hair, doctor)	Primary Residence	Private event (e.g. wedding)
Business (e.g. insurance inspection)	Temporary Housing	Local/community event (e.g. Riding into History, Girls on the Run 5K)
Walking/Exercise/Leisure	Visiting a resident	Voting
Golf	Employment	
Kids’ athletics/after-school activities		

When asked what they particularly liked about their experience at the WGV, overwhelmingly, participants said that they enjoyed the scenery and ambiance, with over 70% of participants selecting that option. Convenience and accessibility, the next most commonly reported option, was cited by just 41% of respondents. A minority of participants reported particularly liking the services and activities available. The redevelopment of the WGV properties gives SJC the opportunity to select services and activities that will resonate better with stakeholders and visitors.

While just 3% of respondents reported enjoying the business/office space, this should be interpreted with caution. This could be indicative of the need to improve the commercial space. However, it could also be reflective of the survey sample; if most respondents are not business owners in the WGV, they may not select that option.

Figure 5: What participants particularly enjoyed about their experience at the WGV.



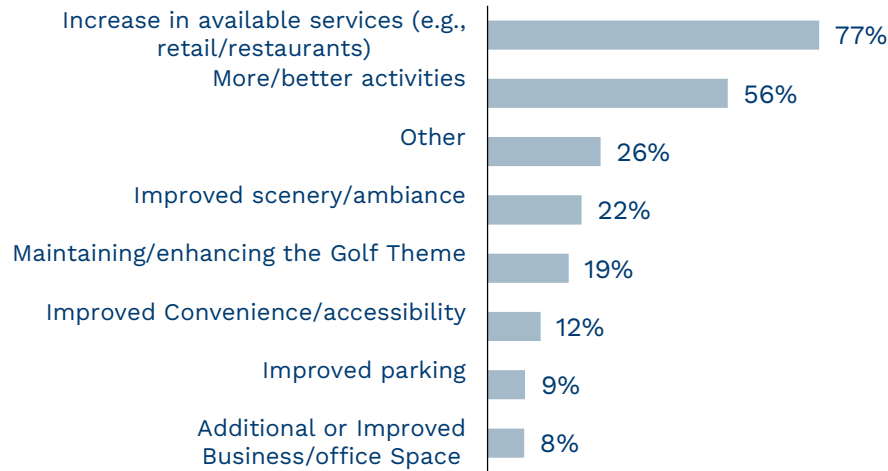
For the 14% that cited another highlight of their experience at the WGV, many of these were closely aligned with the options provided. An analysis of the responses provided the following insights and themes.

Figure 6: “Other” highlights of the visitor experience at WGV.

<i>Landscape, Atmosphere, & Safety</i>	<i>Convenience</i>	<i>Business, Retail & Amenity Offerings</i>
Beautiful landscape	Close parking	IMAX Theater
Peaceful atmosphere	Close proximity to primary residence	Retail and Restaurant Offerings
Sense of community		Convention Center/Event venue spot
Family-Friendly Area		Hotel
Safety (e.g. streetlights)		Walking/Bike Path around the Lake

Given that less than half of respondents cited the available activities and services as highlights of the WGV, it’s unsurprising that increasing and improving those are the most common recommendations to provide a better experience.

Figure 7: Suggestions for improvements to the WGV experience.



Those who selected “Other” provided a wide variety of suggestions. Many of the suggestions centered around the types of services, activities, and businesses they would like to see in the area. These ranged from high-end retail opportunities to educational facilities.

Figure 8: “Other” suggestions for improvements to the WGV.

<i>Services/Activities</i>	<i>Business Types</i>
Municipal services (includ. Welcome center)	High-end businesses
Hub with retail, restaurants, entertainment, and activities	Local, small businesses
Retail and Restaurants	Medical Complex
Entertainment facilities	Facility with a pool
Family-friendly recreational centers	Educational services/Public school
Cultural facilities (e.g. museum, aquarium)	Business park
Communal services	Health & Wellness Center
More automotive shows	Establish Church of Eleven22
More community events (e.g. fireworks)	Keep IMAX theater

Other suggestions included making access easier, through improved road conditions, signage, and entrances/exits, as well as providing truck parking. Some wanted to avoid services that would increase road volume, while others wanted to encourage tourism in the area. Respondents were supportive of the open space in the WGV, with some specifically requesting for the preservation of native plant life. Establishing additional housing at the site had mixed responses, with some requesting more housing and others wanting none.



Future Use

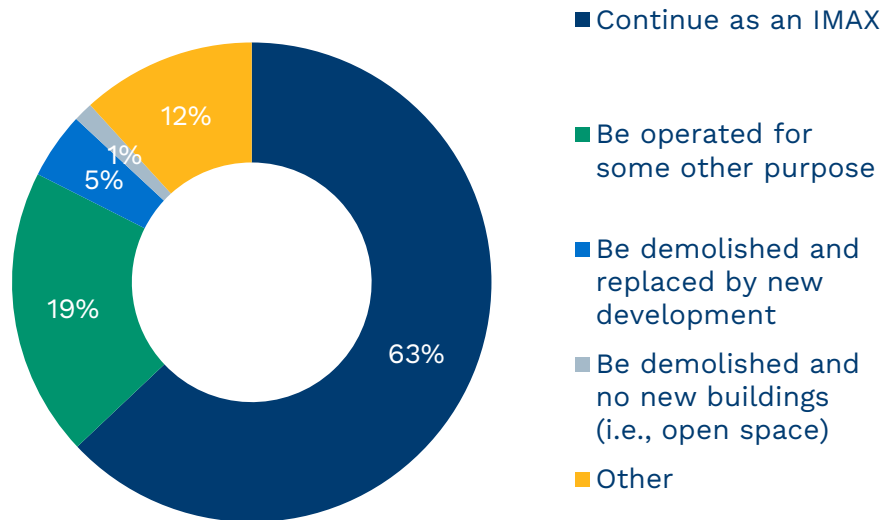
1 WORLD GOLF PLACE BUILDINGS

The buildings under consideration at 1 World Golf Place include the former World Golf Hall of Fame, a 64,113 square foot multi-purpose building, and the World Golf Hall of Fame IMAX Theater, a 17,865 square foot movie theater. The equipment for the theater will remain after WGF vacates the building.

Just over half of the survey respondents believe that SJC should maintain ownership of 1 World Golf Place. Thirty-six percent of participants had no strong opinion, and 14% think that the County should not maintain ownership.

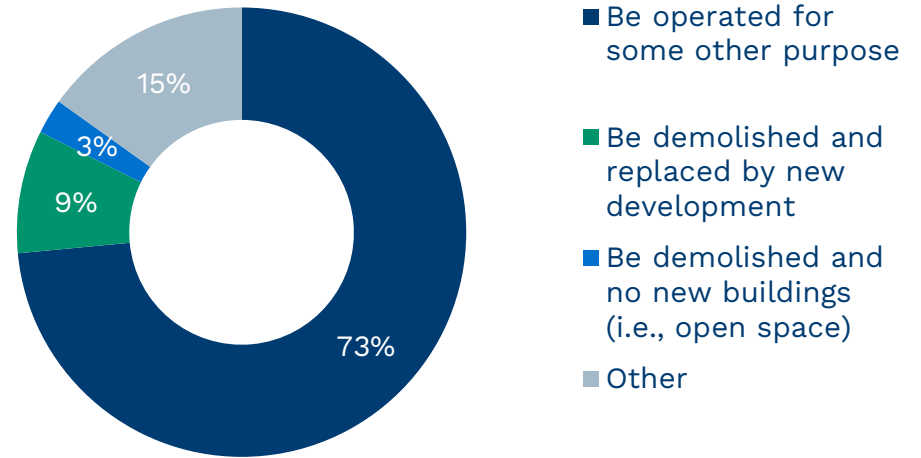
When thinking about just the IMAX building, the majority of respondents prefer that it continues to operate as an IMAX theater.

Figure 9: Preferences for the future of the IMAX building.



When asked about the World Golf Hall of Fame Building, almost three-quarters of respondents would like it to be operated for some other purpose.

Figure 10: Preferences for the future of the World Golf Hall of Fame building.



Given that over 65% of respondents have visited the current facilities ten times or less in the past year, understanding what would draw them to the area is critical for the successful redevelopment of the property. An entertainment facility and food court/large restaurant were the most frequently reported building uses that participants would visit, each selected by over 50% of respondents. These uses have lower levels of opposition, with 20% or less of respondents saying they would be particularly unhappy with those usages. Leisure/recreation activities and cultural uses also had relatively high percentages of participants who would like those uses and relatively low percentage of opposition.

Industrial/warehousing activities, automobile/recreational vehicle dealerships, and luxury apartments all received low levels of support, ranging from 0% to 2% of participants saying they would like to visit or attend. Conversely, they had the highest levels of opposition, with more than 60% of respondents saying they would be particularly unhappy with this use.

Table 1: Participation support and opposition for potential uses for the World Golf Hall of Fame Building.

Potential Uses for World Golf Hall of Fame Building	% of Respondents Who Would Like to Visit/Attend	% of Respondents Who Would Be Particularly Unhappy with Use
Entertainment Facility (e.g., music/concert venue)	65%	19%
Food Court or Large Restaurant	52%	20%
Leisure/Recreation (e.g., a waterpark or golf related activity)	41%	17%
Cultural Uses (e.g., a museum)	41%	13%
Educational Activities or Experiences	31%	11%
Municipal Services (e.g., a library)	30%	15%
Other	25%	9%
Boutique Hotel	11%	23%
Big Box Retailer	10%	52%
Medical Facility	7%	35%
Business/Research Activities	3%	24%
Luxury Apartments	2%	61%
Automobile/Recreational Vehicle Dealership	1%	68%
Industrial/Warehousing Activities	0%	63%



21 WORLD GOLF PLACE

21 World Golf Place is home to PGA Tour Productions, located in a 32,329 square foot Class-A office building. When asked what use they would like to see, the top three supported uses were professional/corporate offices (50%), non-profit/NGO offices (36%), and municipal government offices (34%).

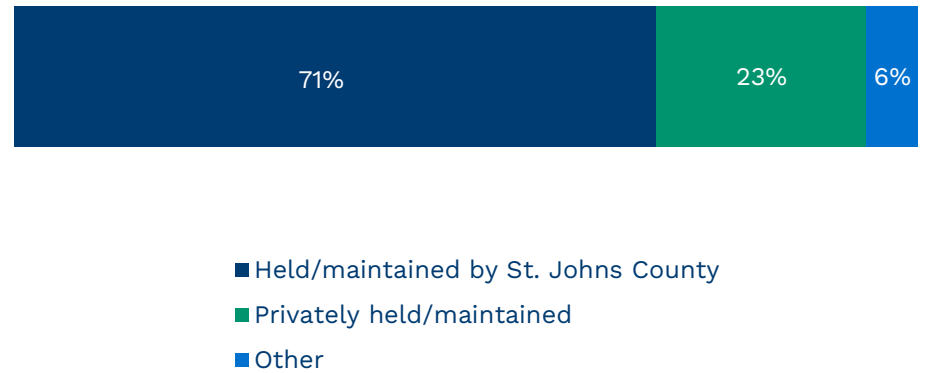
Table 2: Support for potential uses of 21 World Golf Place.

Potential Office Activities	% of Respondents who Support
Professional/corporate offices	50%
Non-profit/NGO offices	36%
Municipal government offices	34%
Research/scientific offices	30%
Finance/insurance offices	19%
Shared or Incubator office space	18%
Other	18%

SOUTH LEGACY TRAIL

South Legacy Trail consists of 36 acres of parking, drainage, right of ways, and submerged lands. Currently, this property is not owned by the county, though the Board of County Commissioners (BCC) is the regulatory agency that governs its future land use. Respondents were asked if they would like to see the property held and maintained by SJC, or if it should be privately held and maintained. Participants had a strong preference for the property to be controlled by the County.

Figure 11: Preferences for the South Legacy Trail.



PUBLIC MEETINGS

SJC held two public meetings, on September 27th and September 28th, 2023. These meetings gave members of the public the opportunity to present ideas for the redevelopment of the WGV properties. Attendees at both meetings had the opportunity to speak, as well as provide written comments. Stakeholders had a wide range of suggestions for ways in which the WGV properties should be used, as well as ways in which they did not want them to be used. These can be seen below in Figure 12.

In addition to what they do and do not want in the WGV space, stakeholders voiced concerns for the development of the site. Many of these centered around traffic and roadway infrastructure. Other concerns included the distance from the major thorough and general concern for how the development will impact residents of the WGV.



Figure 12: Desirable and undesirable uses for the WGV from the public meetings.

Suggestions for WGV properties	Bring back community events
	IMAX Theater
	Church of Eleven22
	School
	Family-friendly recreational facilities
	Retail (some suggestions for high-end retail)
	Restaurants (some suggestions for high-end restaurants)
	Library
	Music/entertainment venue
	Performing Arts Center
Suggestions for ways in which WGV properties should not be used	Space for community/family-friendly events/activities
	Establish food market
	School
	Retail/restaurant
	Library
	Music or performing arts center
	IMAX theater
	Housing
	Additional church
	Big box store

CASE STUDIES

Everest Place: Kissimmee, FL

Everest Place is a 224-acre development, located in an Orlando suburb. Like WGV, the development is located on a lake, and provides natural amenities, including a multi-use trail, nature trail, and a waterfront boardwalk. The development, when completed, will cater to tourists and residents alike, with a mix of residential and commercial space. The commercial space will include high-end cafes and restaurants, retail stores, a conference center, and hotels, in addition to a health center, increasing access to healthcare. While community members in SJC are not in favor of further residential development, this development provides inspiration for the redevelopment of the WGV.

 <https://www.everestplace.com/>

Eagleview Town Center: Exon, PA

Located outside of Philadelphia, Eagleview Town Center is designed to be a self-contained community, where you can “dine, shop, live, work, and play.” Eagleview has over 1,000 residences, 2.5 million square feet of commercial office space, and more than 50,000 square feet of retail space. In the middle of this master-planned community is the Town Center, which has restaurants, retail, offices, and a day care. Within the Town Center is a 2-acre green space, which hosts festivals, movie nights, summer concerts, and a farmers’ market. Other amenities within the community include soccer and baseball fields, tennis courts, playgrounds, a community garden, and swimming pools. Outdoor recreation and walkability are a focus, with ample greenways, parks, and over 14 miles of trails. The Town Center and “dine, shop, live, work, and play” model reflect many of the sentiments expressed by stakeholders, who desire attractive retail and dining options, as well as space to host community events.

 <https://eagleviewtowncenter.com/>

Pringle Creek Community: Salem, OR

A local investment company purchased 32 acres in a neighborhood on the outskirts of Salem, OR, to create a sustainable, mixed-use community. The community features a mix of residential, commercial, and green spaces. A mix of residential options are offered. Many residential units within the community are cottage courtyard units (small units arranged around a courtyard) or detached accessory dwelling units. A hotel is permitted to be built on the property. Office and retail space is available, as well as adult education centers and community rooms. Small commercial units are limited to 2,500 sq. ft., but there are other spaces, such as Live/Workspaces, which offer working spaces at the center of residential complexes. A variety of cafes, restaurants and other shops attract visitors. The community center focuses on green architecture, and features greenhouses and carefully designed lawns and greenspaces. The design intentionally focuses on maximizing acreage through efficient mixed-use layouts, resulting in a compact neighborhood where residents can live, work, and relax.

 <https://pringlecreek.com/>


Mosaic: Fairfax, VA

Mosaic provides a mix of commercial and residential space, with a hotel on-site. For commercial space, there are 30 retail stores, 38 restaurants (luxury and fast-casual), and a variety of service-offering businesses, like dry cleaners, barbers, nail lounges, eye doctor, etc. Office space is available, and there's a coworking community ("Mosaic Niche"). The Angelika Film Center is the primary attraction of the development, bringing in filmmakers and film enthusiasts. The hotel, Archer Hotel Falls Church is a luxury hotel. There are three options for those interested in calling Mosaic home, including townhomes and apartments. To encourage the community atmosphere, there is a year-round farmers market, free fitness classes, and other community events. For easy access, there are five parking garages located nearby, offering 2,500 parking spaces. SJC has strong community support for the IMAX theater; this development, with its focus on the Angelika Film Center, can serve as a source of inspiration for a theater-centric development.

 <https://mosaicdistrict.com>

Nuevo: Rio Rancho, NM

Nuevo is a 20-acre master-planned mixed-use development located in a suburb of Albuquerque. The development has easy access to SR 550, SR 528, and I-25. This development will include a mix of residential and commercial space, resulting in a live-work environment. When complete, there will be 169 residential units available, 138,000 square feet of retail space, and 48,800 square feet of office of restaurant space, as well as parking for 900 vehicles. At the center of the development is a green space/community gathering area

 <https://fbtarch.com/places/planning-urban-design/nuevo-mixed-use-development/#:~:text=Upon%20completion%2C%20Nuevo%20will%20encompass,%E2%80%9Clive%2Fwork%E2%80%9D%20environment>



VISION FOR WGV

Today, WGV in SJC offers championship golf courses, beautiful accommodations, and choices for dining and shopping, as well as housing for SJC residents. The natural landscape, with its parklike feel, provides visitors and residents alike with an escape from the hustle-and-bustle of the day-to-day. However, despite its benefits and amenities, the area has struggled to attract and retain commercial businesses. Further, a recent public survey for the WGV found that 66% of participants visited the WGV ten times or less in the past year. With the World Golf Foundation's notification to vacate, SJC received the opportunity to redevelop and reenergize the WGV area.

While SJC wants to retain the golf-focus and resort feel of the area, plans for future development will shift the properties from solely being golf-focused to a vibrant space, catering to a variety of interests, meeting the needs of both residents and visitors. Potential developers for the site should present a coherent vision for the site, positioning the WGV as a premier location to live, work, shop, play, and stay. Further, they demonstrate how their proposed uses are complementary to the existing businesses and enhance the quality of life for SJC residents.



Recommendations

Given the location of the WGV and distance from International Golf Parkway, the redevelopment of 1 World Golf Place and 21 World Golf Place should focus on creating a destination attraction, which would include a combination of businesses, all aimed at serving a high-end clientele. The intention is to create a critical mass of entertainment, retail, and restaurants venues sufficient to draw visitors into the WGV and provide an enticing mix of activities for residents.

Redevelopment of this area should be strategically oriented towards revenue generation and expanding the economic base for the County. While there was some support for using the space for a church, library, or a school, it is crucial to recognize that these options will not contribute to revenue generation for the County. Instead, the focus should be on fostering redevelopment activities that contribute to increased tax revenues, which will, in turn, provide necessary funding for essential public services such as schools, libraries, and infrastructure.

WORLD GOLF HALL OF FAME IMAX THEATER

Retain the IMAX Theater

In the survey, public meetings, and written comments, public opinion was in support of keeping the IMAX. Given the high level of support, retaining the IMAX should be a priority for the County. As the only IMAX in Northeast Florida,¹ this amenity benefits both residents and visitors alike. Potential developers should conduct a feasibility assessment of upgrading the facility to a 70-millimeter project. This would make it one of only 30 locations worldwide with that capability, further differentiating the theater from competition and increasing the draw.

¹ "IMAX at World Golf Village will remain open until the end of January." Action News JAX.



WORLD GOLF HALL OF FAME

With over 60,000 square feet of commercial space, the former World Golf Hall of Fame could be redeveloped for multiple uses. As such, three suggestions for the use of the space are detailed below.

Restaurants and Dining

Half of the survey respondents reported dining as the impetus for their visit to WGV. This means that 50% are not visiting the WGV for dining. However, over three-quarters of survey respondents said that increased services, including restaurants and dining, would improve their experience at the WGV. When asked about future use, over half of respondents said they would visit a food court or large restaurant. In open-ended comments and public comments, stakeholders lamented the limited dining options available to them at the WGV.

Increasing the dining options could draw residents into the WGV, as well as benefiting the hotel, by providing additional local amenities. Restaurant and dining options should blend seamlessly with the upscale, resort feel of the WGV and should provide unique dining opportunities not found elsewhere.

High-End Retail

Presently, only 15% of surveyed individuals visit the WGV primarily for its retail offerings, yet a majority highlight that enhanced services could significantly enhance their overall experience at the WGV. Similar to the dining options, it is imperative that the retail options seamlessly align with the distinctive atmosphere of the WGV. The incorporation of upscale shopping establishments would not only enhance the quality of the visitor experience but also position the WGV as a comprehensive lifestyle destination. Familiar upscale shopping establishments could include Chanel, Dior, Louis Vuitton, Neiman Marcus, Nordstrom and others. By ensuring that the retail landscape complements the overall, the redevelopment can effectively cater to the diverse preferences of residents and visitors, fostering a thriving and well-rounded environment.

Concert Venue/Performing Arts Center

The integration of a performing arts center or concert venue into the WGV aligns with the preferences of survey respondents and stakeholders at the public meetings. This inclusion adds a cultural and entertainment focal point to the development, elevating it beyond mere residential or commercial spaces. The performing arts center serves as a dynamic venue for a diverse array of live performances, spanning from concerts and theatrical productions to dance showcases. Not only does this cater to the varied interests of potential residents and visitors, but it also transforms the WGV into a vibrant community hub. With a commitment to fostering a vibrant cultural scene, the WGV can become a hub for both relaxation and artistic exploration, creating a unique and memorable experience for visitors and residents seeking a blend of leisure and cultural enrichment.



21 WORLD GOLF PLACE

Headquarters for Target Industries

Due to the desirability of the SJC community, available commercial space, including office space, is limited within the County. The relocation and expansion of PGA Tour Productions makes over 30,000 square feet of Class-A office space available for business attraction. Redevelopment efforts for this space should focus on establishing a headquarters within the target industries identified in the St. Johns County Economic Development Strategic Master Plan. This will complement the existing business ecosystem in the County, as well as providing high-quality job opportunities for SJC residents.

SOUTH LEGACY TRAIL

Parking Access and Traffic

As part of this process, the County asked the public for their opinion on the County holding and maintaining South Legacy Trail, 36 acres of parking, drainage, right of ways, and submerged lands. Survey respondents were overwhelmingly supportive of this idea. Ensuring the area has access to sufficient parking is critical to the business attraction efforts. For businesses dependent on drawing customers in, the number of parking spaces can determine their maximum revenue, as they cannot bring in more customers than there are parking opportunities. For office spaces, such as 21 World Golf Place, having reliable access to parking increases efficiency, as employees will not have to spend time attempting to locate available parking.

While parking is necessary, many individuals spoke of their concerns regarding traffic volume and road infrastructure. Any successful redevelopment at the WGV site is likely to increase traffic volume. Plans from potential developers should include tactics to mitigate additional road volume and traffic and the negative impacts on residents at the WGV. Additionally, development partners should be encouraged to consider building additional parking structures or purchasing land from the golf course. Moreover, SJC should consider conducting a traffic study of the area, to improve overall traffic operations and safety.



Strategic Action Steps

REQUEST FOR QUALIFICATIONS

St. Johns County leadership should initiate a process to develop a Request for Qualifications (RFQ), seeking qualified proposals and bids from private developers willing to form a public-private partnership for the redevelopment and management of the World Golf Village. While St. Johns County has established procurement processes in place, it's important for county leaders to be mindful of the key components and requirements necessary to develop an effective RFQ that will attract qualified and visionary development partners. Because a development project at this scale presents many variables and uncertainties, it's important that SJC leadership recognize that an RFQ process will allow the county to select a firm who share's the county's vision for the World Golf Village and will be a suitable and trusted partner through a complicated and complex process. An RFQ process also allows SJC to select a firm beyond price and timeline considerations. Further, it's important for county leaders to use the findings presented in this report to inform the RFQ, ensuring that the potential development partners are well aware of the community sentiment and aspirations and are considered as part of a redevelopment plan.

Tactic 1: Conduct a Site Analysis

The step SJC leaders should take is to conduct or organize a preliminary evaluation of the site. The preliminary evaluation should include an evaluation of the site's current physical characteristics, current tenants, a review of local, state, and regulatory requirements applicable to the development site. This can include zoning, wetlands, stormwater, wastewater, utility access, access points, and transportation and parking infrastructure. Further, the analysis should include site boundaries, topography, and relevant environmental conditions that could impact development.

Tactic 2: Define the Site Vision, Concept, and Goals

Utilizing the findings in this analysis, SJC leaders should clarify its vision, concept, and corresponding goals for the redevelopment site. SJC leaders should outline financial, use, and layout expectations for potential development partners. However, SJC leaders should use caution when outlining these concepts – rather than preparing a specific list of requirements, consider conveying these development goals at a conceptual level, leaving some flexibility for the development partner to consider.

Tactic 3: Define Clear and Reasonable Expectations

It's important for SJC leaders to understand that an overly specific and ambition RFQ could pose considerable challenges for both potential developers and community stakeholders. If a development vision is too rigidly defined, community members may be disappointed if the development does not meet the exact expectations as outlined in the RFQ. Additionally, an overly ambitious RFQ and scope of work may not be financially feasible, potentially limiting responses from qualified development partners.

Tactic 4: Conduct Financial Feasibility

SJC leaders would be wise to develop a simple financial pro forma to calculate the potential costs and revenues from the development project, based on the vision, concept and goals. The simple pro forma should consider the costs of site preparation and infrastructure, current market rate construction costs, and existing rents and sales prices for similar buildings in and around the market. This financial feasibility analysis does not need to be overly detailed, but sufficient enough to demonstrate a reasonable likelihood of financial success for the development partner.

Tactic 5: Outline Potential Incentives

County leaders should have a solid understanding of the potential incentives that may be available and appropriate for the project before the RFQ is distributed to potential partners. While Tax Increment Financing is not available in the state of Florida, the state does offer other potential applicable incentives that could incentivize redevelopment. It's important to note, that while SJC leaders should have an understanding of the tools available to them, they should make sure not to overpromise in the early stages and be careful what is explicitly listed as an option in the official RFQ.

Tactic 6: Develop the RFQ

After completing the previous stages, SJC leaders should develop the official Request for Qualifications. It's important to remember that the RFP serves as a marketing document for both the World Golf Village and the community as a whole. It should be visually appealing, including high-resolution photos of the site and surrounding areas. Additionally, the document should be easily read, accessible, compelling, and interesting. Where appropriate, it should include links to other pertinent information including zoning and land use plans. Key components to consider include:

- Cover sheet
- Development opportunity overview
- Site information and context
- Site vision
- Development process overview
- Market conditions
- Application and administrative details

Tactic 7: Distribute the RFQ

Once complete, distributing the RFQ is a critical step in soliciting qualified bids. SJC leaders would be wise to cast a wide net, and also identify specific development partners they would like to target with the RFQ. Additionally, SJC should ensure adequate staff capacity is planned for, to ensure the county can respond to questions and inquiries in a timely manner.

Tactic 8: Establish Selection Criteria

If the RFQ process is successful, SJC leadership will have multiple responses to consider. The process for making a selection should be determined beforehand, including who will make the decision, on what timeline, and what criteria will be used. SJC leaders should use the stakeholder and community feedback analyzed in this document to inform part of the decision criteria.



