

Spotlight: Outdoor Recreation Points of Interest

Visit Jacksonville

March 2023



ZARTICO



Objective

To understand the impact of outdoor recreation points of interest (POIs) on Visit Jacksonville in order to find key visitor marketing opportunities to these types of POIs. Primary focus of this analysis includes the following POIs:

- Pumpkin Hill Creek Preserve State Park
- Fort George Island Cultural State Park
- Talbot Island State Parks
- Kathryn Abbey Hanna Park
- Thomas Creek Conservation Area
- Cecil Field Recreation Complex
- Baldwin Trail
- Northbank Riverwalk
- Jacksonville Arboretum And Gardens

Date(s): January 2022 - December 2022



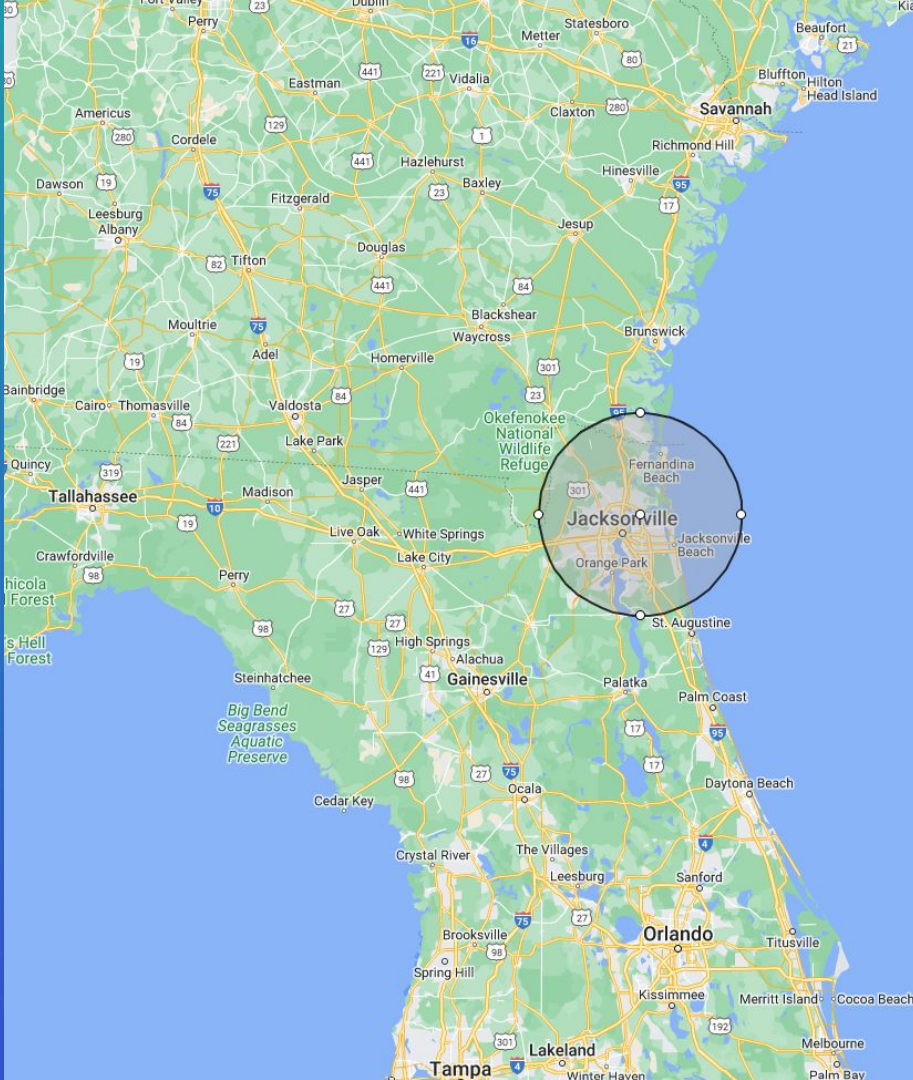
Visitor Definition

Zartico defines a visitor as someone who has:

- Come from over **30 miles** from where they live and/or work
- Stayed for more than **two hours** in your destination
- Visited at least **one place of impact**

There is no time minimum that a person must stay at a POI to be counted a visitor, but they must meet all three criteria to be counted.

Regarding **visitor spending**, a visitor is defined as a transaction greater than **60 miles** between the center of the cardholder zip and the center of the merchant zip.



KEY INSIGHTS

Outdoor recreation POIs are **primarily visited by Duval County residents** and others within 30-miles of the points of interest (POIs).

Most of the parks in this study had a higher share of residents compared to the average destination POI. However, Fort George Island Cultural State Park, Kathryn Abbey Hanna Park, and Talbot Island State Parks had a higher share of visitors when compared to the average outdoor recreation POIs.

The **Jacksonville Arboretum and Gardens had the highest share of visitors that were observed at accommodations** as well other POI categories throughout the destination. However, 9% of all observations were visitors which was the lowest share of all analyzed parks.

Who goes to outdoor recreation POIs?

Source: Near 2022

23% are Visitors

Compared to 22% average Jacksonville POIs

62% are from Duval County

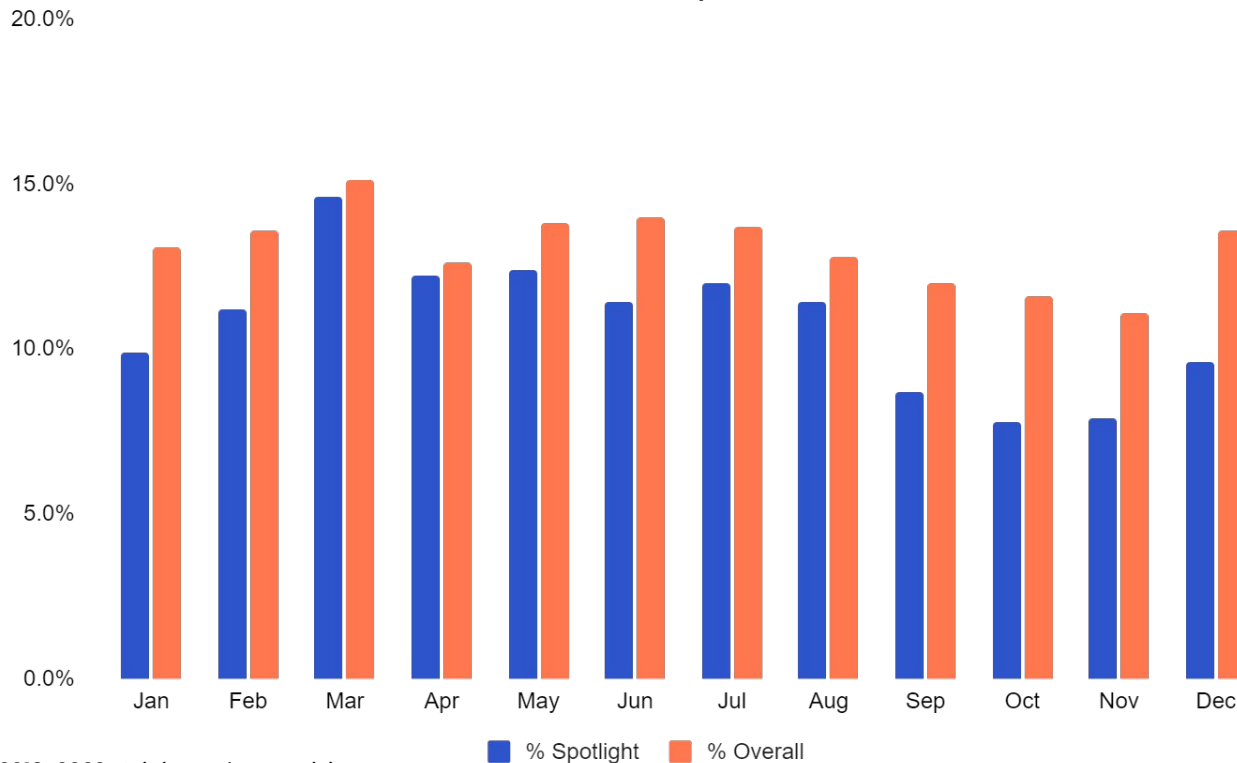
Compared to 74% average Jacksonville Outdoor Recreation POIs

77.3% Overnight Trips

Compared to 74.6% average Jacksonville POIs

Monthly Visitation Trends

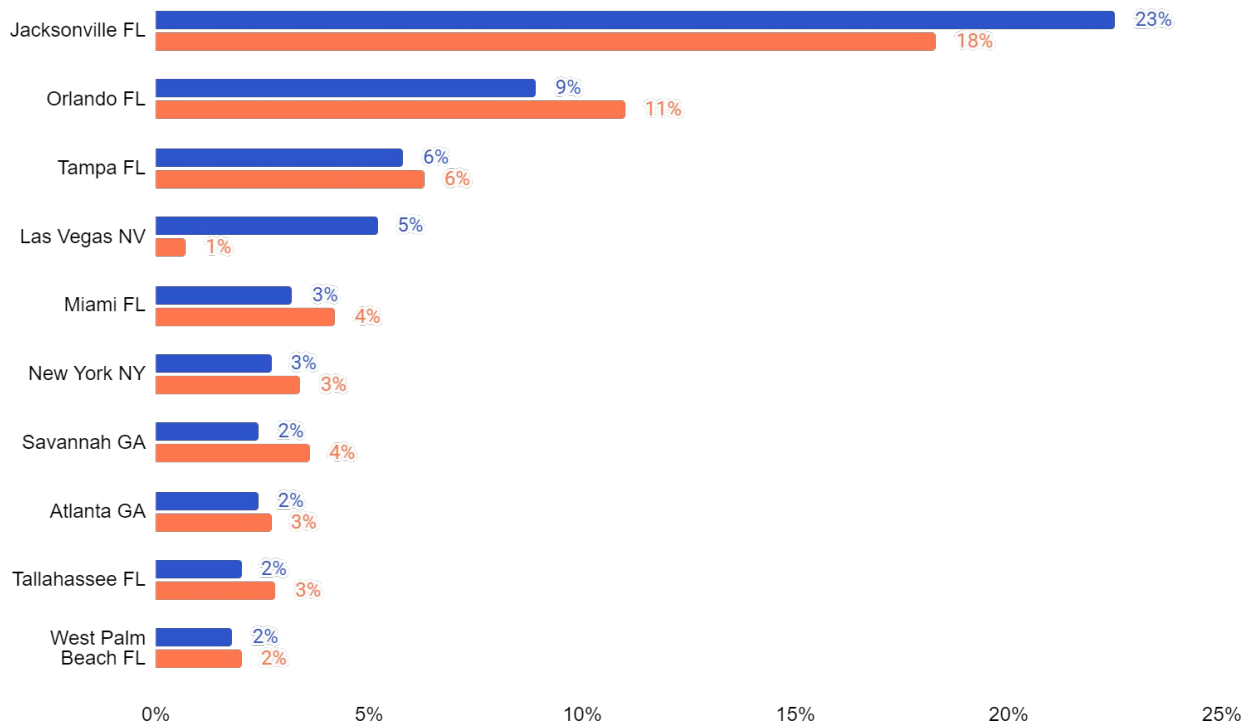
Outdoor recreation POIs follow similar monthly visitation trends when compared to the overall destination. However, there is a more noticeable drop in visitation in the fall months compared to the overall.



Source: Nea, Monthly averages 2019-2022; Origin Markets = Visitor DMAs

Top Origin Markets

Outdoor recreation POIs have a 28% higher share of visitors from the Jacksonville FL DMA compared to the overall destination.

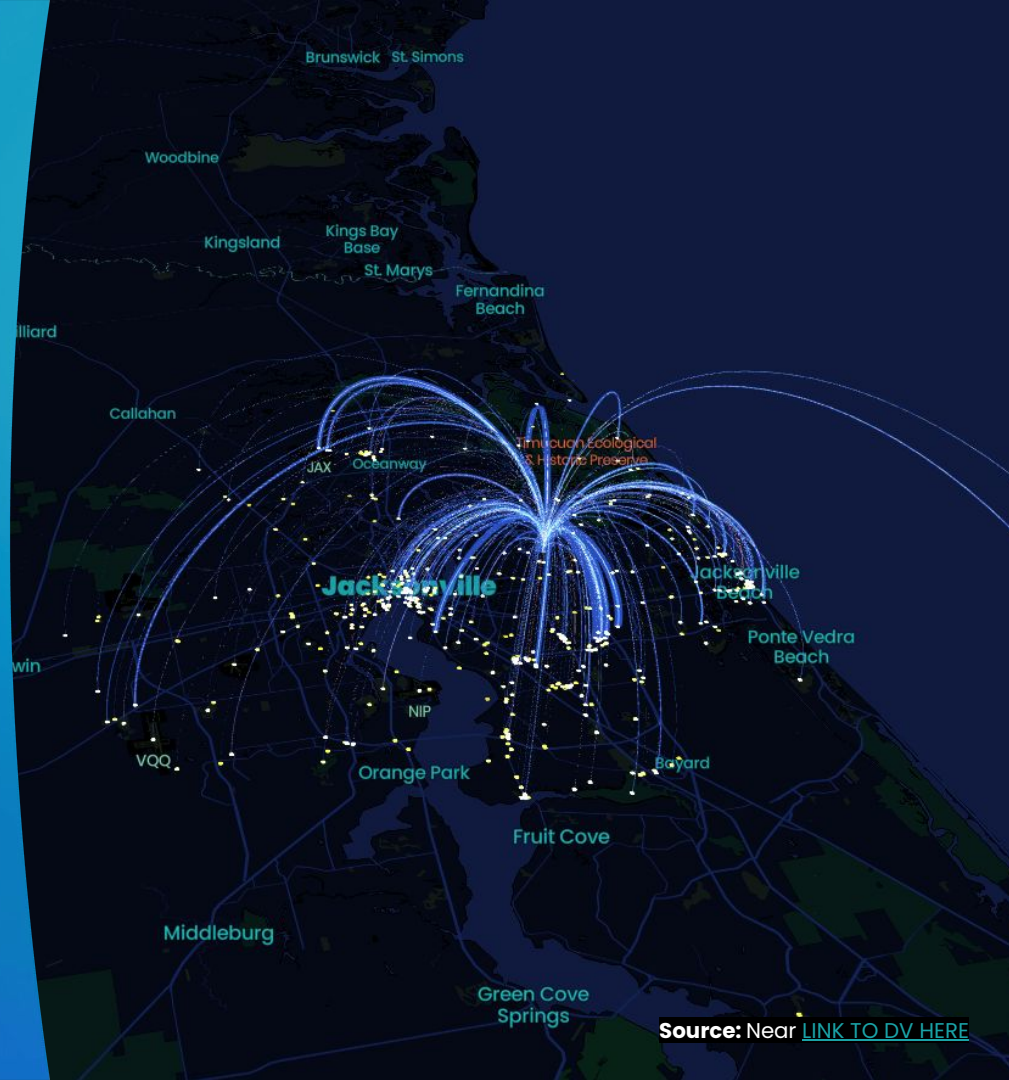


Source: Near 2022; Origin Markets = Visitor DMAs

■ % Spotlight ■ % Overall

Where do JACKSONVILLE ARBORETUM AND GARDENS visitors also go?

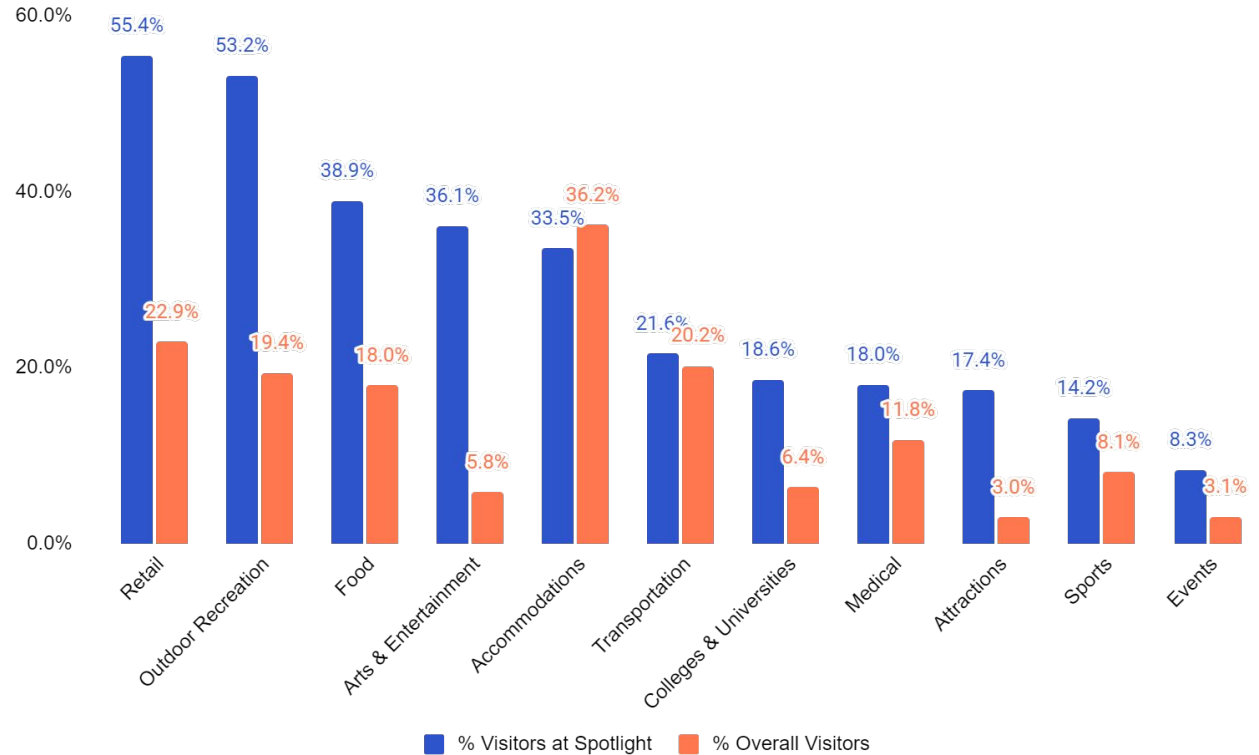
- **33.5% of visitors** were also **observed at accommodations.**
- Visitors primarily **visited Southside, Northside/Airport, Arlington, and Downtown** POIs.
- Top visited POIs include St. Johns Town Center, Timucuan Ecological & Historic Preserve, Jacksonville International Airport, University Of North Florida, and Jacksonville Beach.



Source: Near [LINK TO DV HERE](#)

Visitation by POI Category

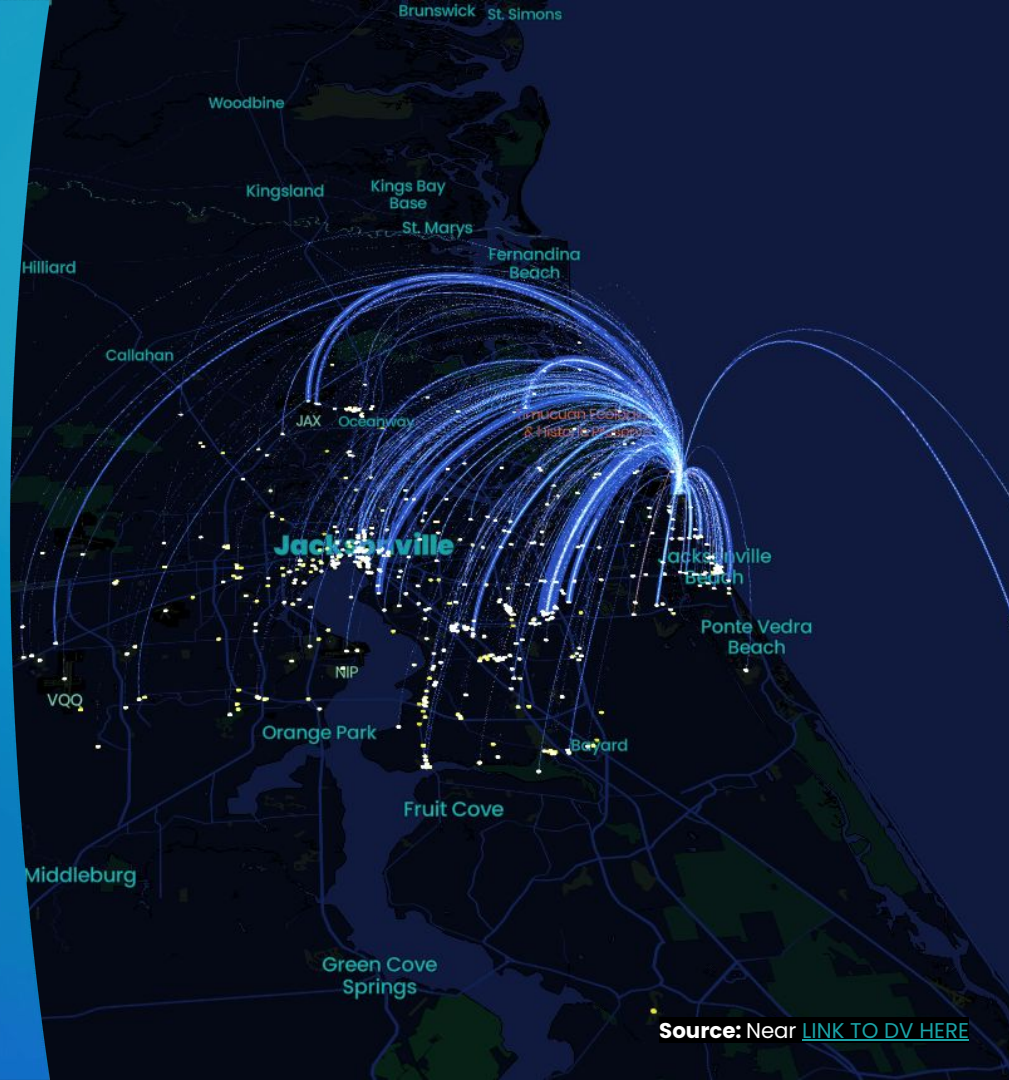
Visitors to Jacksonville Arboretum and Gardens were observed visiting multiple types of POIs.



Source: Near, January - December 2022, Cross visitation from Jacksonville Arboretum and Gardens only

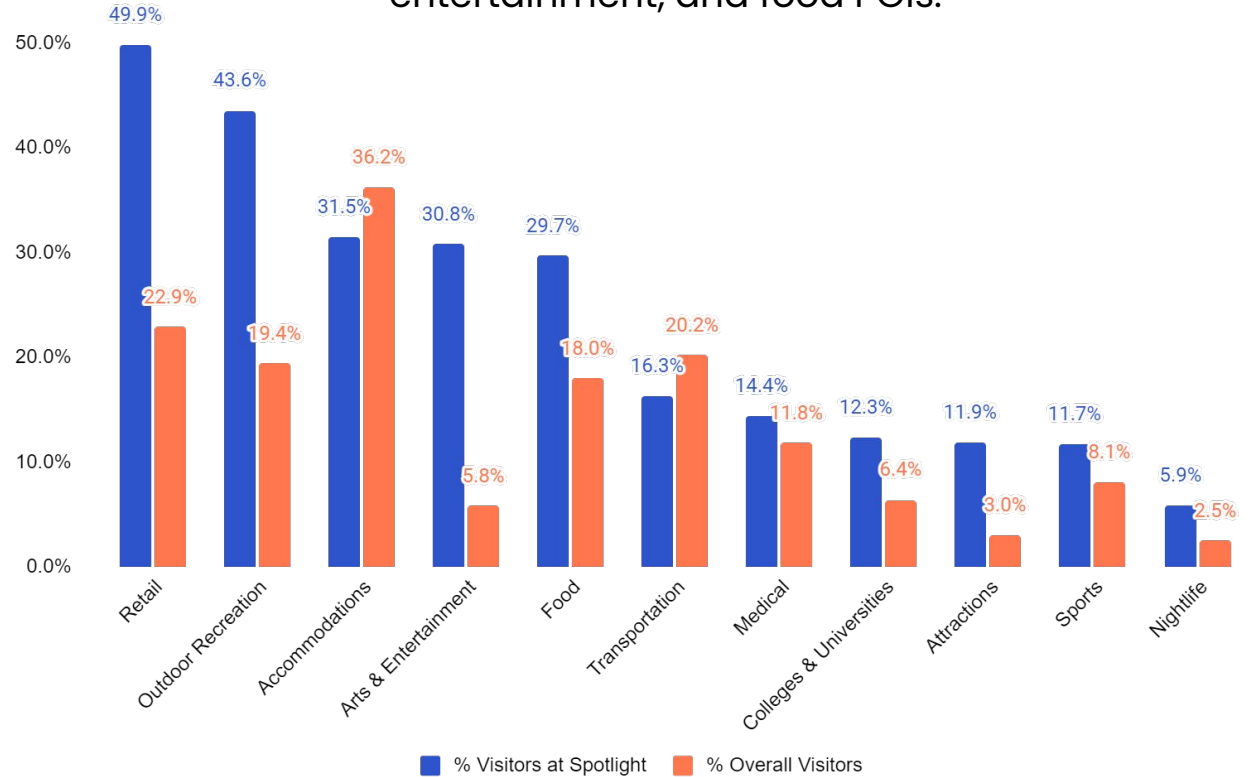
Where do KATHRYN ABBEY HANNA PARK visitors also go?

- **31.5% of visitors** were also observed at accommodations.
- Visitors primarily visited **Southside, Northside/Airport, Neptune Beach, Downtown, and Mandarin** POIs.
- Top visited POIs include St. Johns Town Center, Timucuan Ecological & Historic Preserve, Jacksonville International Airport, Atlantic Beach, Jacksonville Beach, University Of North Florida, and Beaches Town Center.



Visitation by POI Category

Visitors to Kathryn Abbey Hanna park were observed primarily visiting retail, other outdoor recreation, arts & entertainment, and food POIs.



Source: Near, January - December 2022, Cross visitation from Kathryn Abbey Hanna Park only

Where do PUMPKIN HILL CREEK PRESERVE STATE PARK visitors also go?

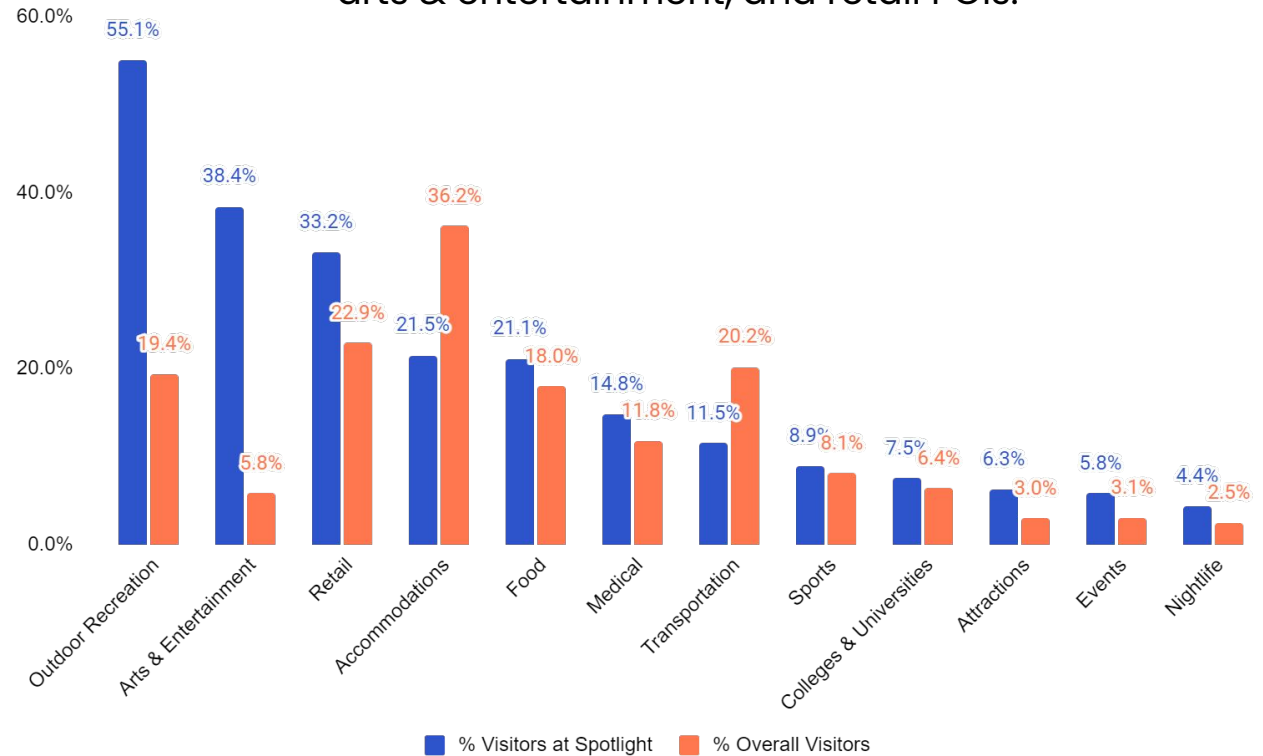
- **21.5% of visitors** were also **observed at accommodations.**
- Visitors primarily **visited other Northside/Airport and Southside** POIs.
- Top visited POIs include Timucuan Ecological & Historic Preserve, William F Sheffield Regional Park, St. Johns Town Center, Jacksonville International Airport, and Talbot Island State Parks.



Source: Near [LINK TO DV HERE](#)

Visitation by POI Category

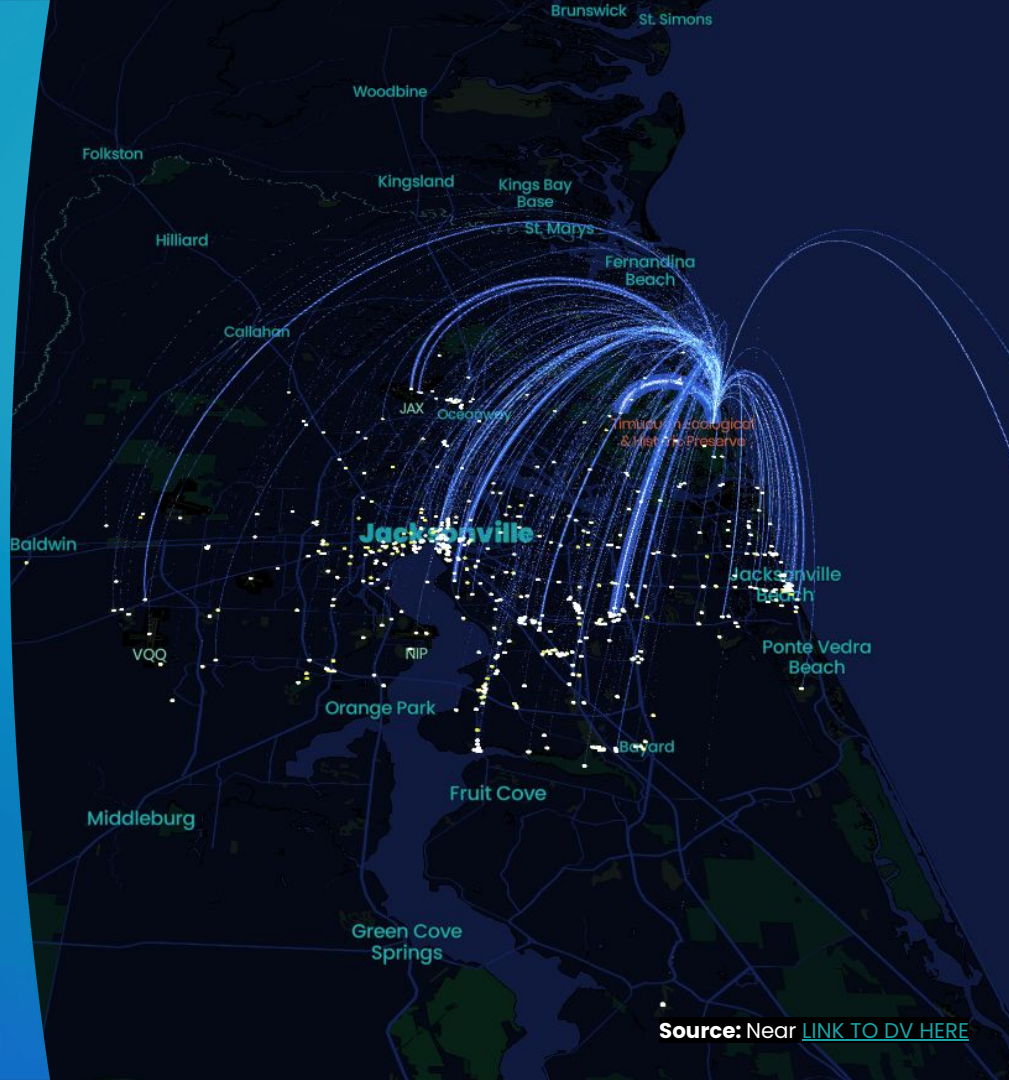
Visitors to Pumpkin Hill Creek Preserve State Park were more likely to be observed at other outdoor recreation, arts & entertainment, and retail POIs.



Source: Near, January - December 2022, Cross visitation from Pumpkin Hill Creek Preserve State Park only

Where do TALBOT ISLAND STATE PARKS visitors also go?

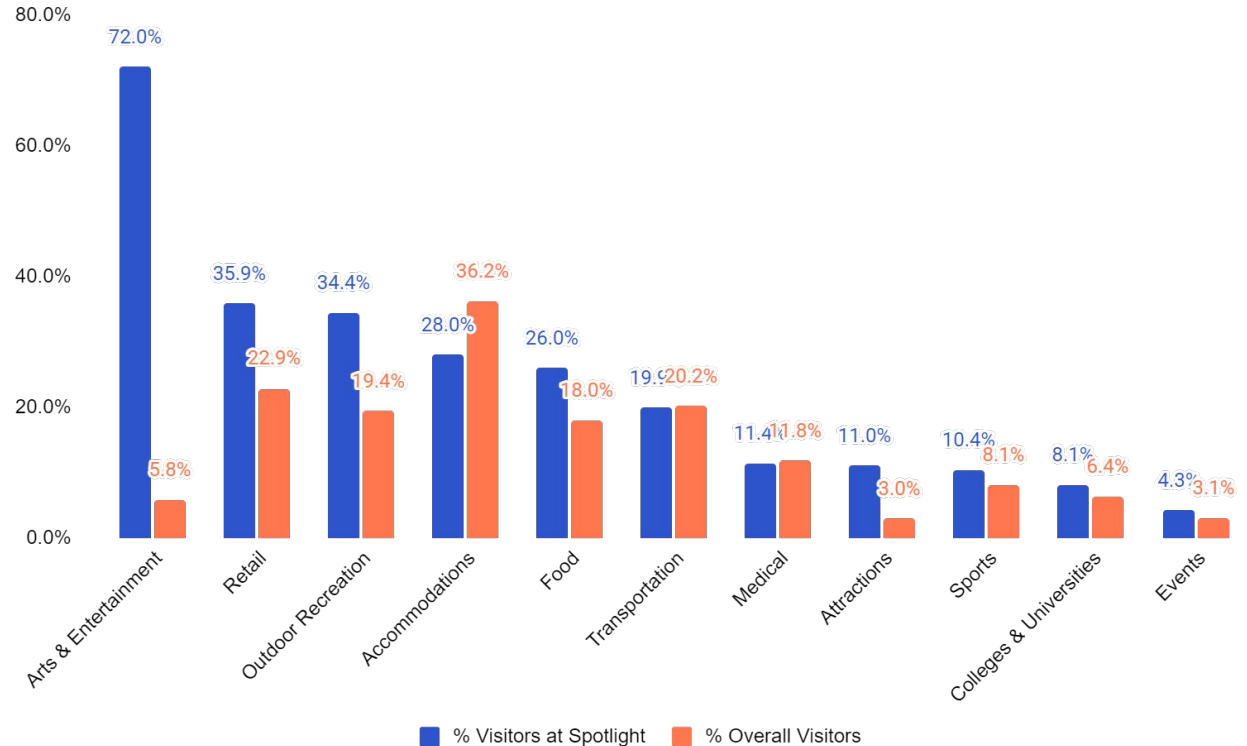
- **28% of visitors** were also **observed at accommodations.**
- Visitors primarily **visited Northside/Airport, Southside, and Downtown** POIs.
- Top visited POIs include Timucuan Ecological & Historic Preserve, St. Johns Town Center, Jacksonville International Airport, Jacksonville Beach, University Of North Florida, and Fort George Island Cultural State Park.



Source: Near [LINK TO DV HERE](#)

Visitation by POI Category

Visitors to Talbot Island State Park were more likely to be observed at arts & entertainment, other outdoor recreation, and retail POIs.



Source: Near, January - December 2022, Cross visitation from Talbot island State Parks only

Where do THOMAS CREEK CONSERVATION AREA visitors also go?

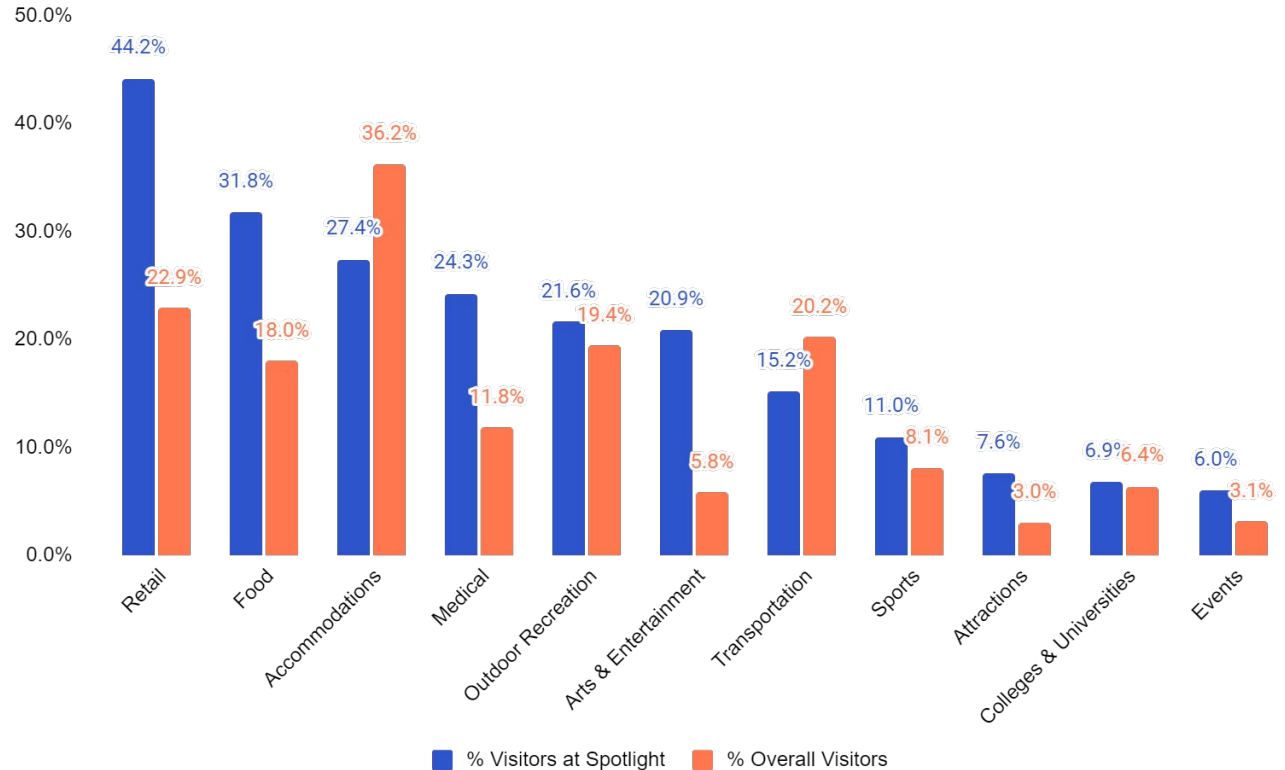
- **27.4% of visitors** were also observed at accommodations.
- Visitors primarily **visited Southside, Northside/Airport, and Westside** POIs.
- Top visited POIs include St. Johns Town Center, Timucuan Ecological & Historic Preserve, Jacksonville International Airport, Baptist Medical Center Jacksonville, and Cecil Commerce Center.



Source: Near [LINK TO DV HERE](#)

Visitation by POI Category

Visitors to Thomas Creek Conservation Area were more likely to be observed at retail and food POIs.



Source: Near, January - December 2022, Cross visitation from Thomas Creek Conservation Area only

RECOMMENDED ACTIONS

- Review opportunities to **encourage visitation in the fall season** as outdoor recreation POIs showed a significant decline in visitation compared to the overall destination.
- **Utilize the cross visitation insights** to POI categories, regions, and top POIs to help influence visitation throughout the entire destination via itineraries and “must see” lists.
- Review opportunities to **increase visitor share of total at underperforming POIs, such as the Jacksonville Arboretum and Gardens**, because they have a higher share of visitors also observed at accommodations.

THANK YOU!

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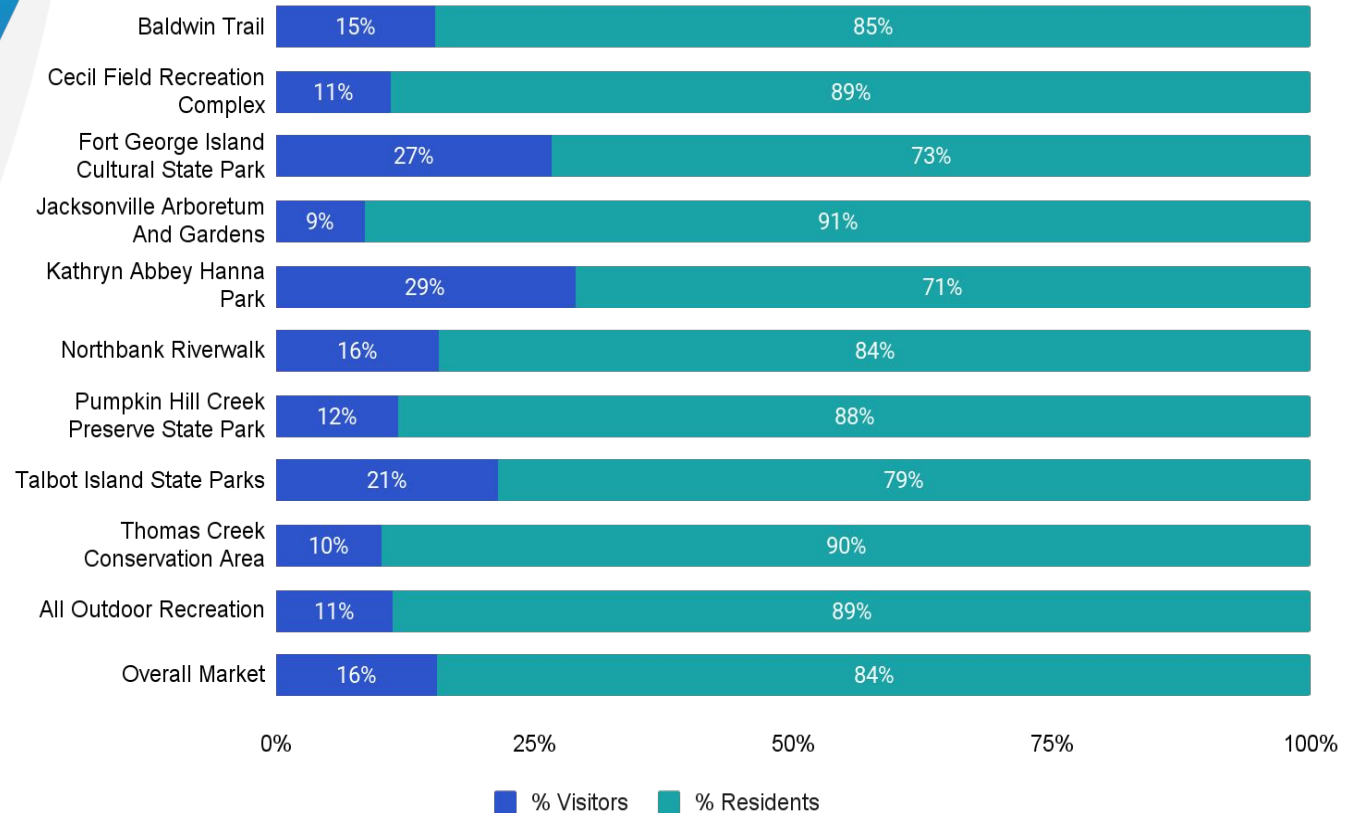
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Appendix



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Visitor Resident Split



Source: Near, 2022