



the State of Downtown

2009 Progress Report

DOWNTOWN
VISION

JEDC
JACKSONVILLE
ECONOMIC DEVELOPMENT
COMMISSION

About Downtown Jacksonville

- 1,740 acres
- \$1.7 billion in development completed or under construction
- \$514 million in proposed development
- 1,100 businesses
- 51,000 employees
- 2,365 residences
- 7.3 million square feet of commercial office space
- 12.5 million visits annually
- 91 restaurants
- 23 bars & nightclubs
- 2,153 hotel rooms
- 3.29 miles of riverwalk

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Downtown Development

Since 2000, 66 projects totaling more than \$1.1 billion in development have been completed in Downtown. Six projects were completed in 2009, totaling \$17 million in investment.

Not unlike other areas, the recession and lack of easily-accessible financing has delayed or halted a number of significant Downtown development projects. In early 2010, five projects were under construction, including four government projects (Duval County Courthouse, Hart Bridge repainting and improvements, I-10/I-95 interchange and Laura Street improvements) and one private project (Baptist Medical Center Surgery Expansion), of which two are located within the walkable core of Downtown. Of the 14 proposed projects for Downtown, eight are public projects including infrastructure improvements and improvements to Downtown parks and the riverwalks, of which two are located in the core of Downtown.

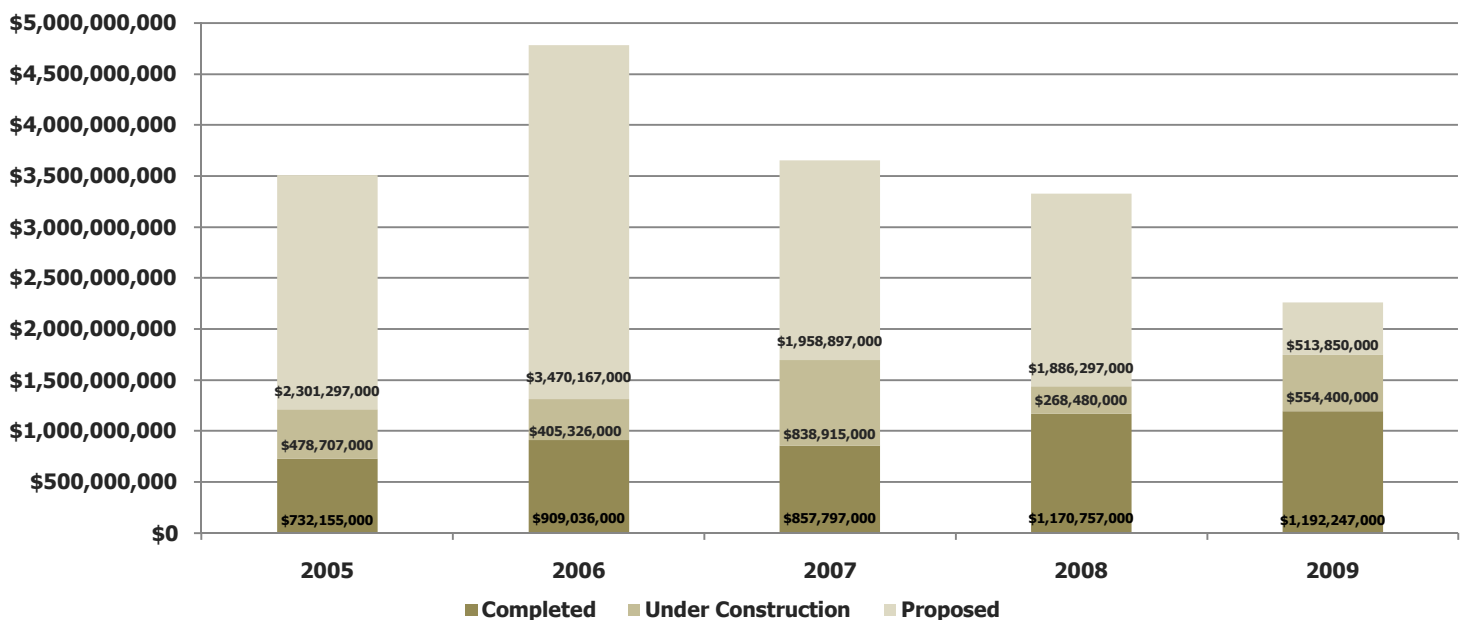
As evidenced by Mayor Peyton's initiatives to improve Metropolitan Park, Friendship Fountain



and Park and the Southbank Riverwalk, public projects will continue to lead the way in Downtown development until the market shows significant recovery, preparing Downtown infrastructure, streetscapes and amenities for future private investment.

Total Downtown Investment Completed, Under Construction & Proposed

Source: Downtown Vision, Inc. & Jacksonville Economic Development Commission



Downtown Development Summary^{1 2}

Source: Downtown Vision, Inc. & Jacksonville Economic Development Commission

Projects Completed from 2000 - 2009

Project	Type	Location	Investment
11 E. Forsyth	Residential	Core	\$24,150,000
100 N. Laura	Office	Core	\$2,500,000
841 Prudential	Office	Southbank	\$24,300,000
Adams Street Station	Culture/Entertainment	Sports Complex	\$8,000,000
Amsterdam Sky Café (City Hall Pub)	Culture/Entertainment	Sports Complex	\$2,000,000
Arena/Sports Complex/County Courthouse Garages	Parking	Sports Complex	\$53,000,000
BB&T Tower	Office	Core	\$220,000
Baptist Hospital	Hospital	Southbank	\$55,000,000
Baseball Grounds of Jacksonville	Culture/Entertainment	Sports Complex	\$34,000,000
Bay Street Town Center Streetscape I	Beautification	Core	\$1,400,000
Bay Street Town Center Streetscape II	Beautification	Core	\$1,200,000
Bay Street Traffic Signalization	Infrastructure	Core	\$3,000,000
Berkman Plaza Phase I	Residential	Core	\$71,450,000
Brewster Hospital	Office	LaVilla	\$2,300,000
Chamblin Bookmine	Retail	Core	\$1,300,000
Churchwell Lofts	Residential	Core	\$8,600,000
Clara White Mission	Office	LaVilla	\$2,150,000
Coffman, Coleman, Andrews & Grogan	Office	LaVilla	\$2,757,000
Community Connections	Office	Periphery	\$850,000
Dalton Agency	Office	Core	\$1,500,000
duPont Testamentary Trust Headquarters	Office	Riverside/Brooklyn	\$20,000,000
Dyal Upchurch	Office	Core	\$1,700,000
Educational Community Credit Union	Office	LaVilla	\$8,000,000
Eclate Jazz Club (Dive Bar)	Culture/Entertainment	Core	\$730,000
Ed Ball Building	Office	Core	\$10,000,000
Elkins Constructors	Office	LaVilla	\$3,310,000
Elks Building	Office	Core	\$5,750,000
Federal Building Renovations	Office	Core	\$20,000,000
Fidelity National Financial	Office	Riverside/Brooklyn	\$53,000,000
Fidelity Park/Northbank Riverwalk Park	Park/Recreation	Riverside/Brooklyn	\$2,000,000
Harmony Dental	Office	LaVilla	\$1,875,000
Hendricks Avenue Reconstruction	Infrastructure	Southbank	\$5,711,000
Holmes Building	Office	Core	\$1,100,000
Home Street Lofts	Residential	Southbank	\$3,000,000
Jacksonville Municipal Stadium Upgrades	Culture/Entertainment	Sports Complex	\$59,000,000
Jake Goldbold City Hall Annex	Office	Core	\$10,000,000
Museum of Contemporary Art (MOCA)	Culture/Entertainment	Core	\$6,000,000
LaVilla Professional Office Complex	Office	LaVilla	\$5,100,000
LaVilla Professional Office Complex Phase II	Office	LaVilla	\$6,200,000
Lee & Cates Glass	Office	LaVilla	\$1,000,000
Main Street Streetscape & Park	Infrastructure	Core	\$1,800,000
Mathews Bridge Grating Replacement	Infrastructure	Periphery	\$12,900,000
New Main Library	Culture/Entertainment	Core	\$95,000,000
Northbank Riverwalk Expansion	Park/Recreation	Riverside/Brooklyn	\$8,500,000
OUR Properties - 100 E. Adams	Culture/Entertainment	Core	\$281,000
Parks at the Cathedral Phase I	Residential	Periphery	\$8,200,000
Police & Fire Pension Fund	Office	Core	\$4,000,000
Public Parking Signage	Infrastructure	Core	\$160,000
Residences at City Place	Residential	Periphery	\$2,000,000
Riverside Arts Market	Park/Recreation	Riverside/Brooklyn	\$1,980,000
Riverside Avenue Partners	Office	Riverside/Brooklyn	\$28,000,000
Riverside Avenue Widening	Infrastructure	Riverside/Brooklyn	\$11,993,000
Ronco Group	Office	LaVilla	\$900,000
San Marco Place	Residential	Southbank	\$49,800,000
St. Joe Company Headquarters	Office	Riverside/Brooklyn	\$24,000,000
State & Union Street Streetscaping	Infrastructure	Periphery	\$6,100,000
Synovus Bank Branch	Office	Southbank	\$1,500,000
The Carling	Residential	Core	\$27,100,000
The Metropolitan	Residential	Periphery	\$16,000,000
The Peninsula & Strand at St. Johns	Residential	Southbank	\$153,690,000
The Warehouse	Office	Core	\$1,290,000

¹ A complete listing of Downtown development projects, including project descriptions, is available upon request from Downtown Vision, Inc.

² Bold items were completed in 2009.

Downtown Development Summary, cont.

Source: Downtown Vision, Inc. & Jacksonville Economic Development Commission

Projects Completed from 2000 – 2009, cont.

Project	Type	Location	Investment
Urban Core - 21 E. Adams St.	Culture/Entertainment	Core	\$1,600,000
U.S. Federal Courthouse	Office	Core	\$80,000,000
Veterans Memorial Arena	Culture/Entertainment	Sports Complex	\$130,000,000
W.A. Knight Lofts	Residential	Core	\$1,600,000
Winn Dixie Renovations	Retail	Periphery	\$3,000,000
66 Projects Completed 2000 - 2009			\$1,192,247,000

Projects Under Construction

Baptist Medical Center Surgery Expansion	Hospital	Southbank	\$27,500,000
Duval County Courthouse	Office	LaVilla	\$350,000,000
Hart Bridge Repainting & Improvements	Infrastructure	Periphery	\$26,200,000
I-95/I-10 Reconstruction	Infrastructure	Periphery	\$148,000,000
Laura Street Improvements	Beautification/Infrastructure	Core	\$2,700,000
5 Projects Under Construction			\$554,400,000

Proposed Projects

20 West Adams	Residential	Core	\$6,700,000
122 Ocean – The Library	Mixed Use	Core	\$20,000,000
200 Riverside	Mixed Use	Riverside/Brooklyn	\$50,000,000
Bus Rapid Transit System	Infrastructure	LaVilla	\$15,000,000
First Baptist Academy Recreation Area	Education	Periphery	\$350,000
Friendship Fountain Improvements	Park/Recreation	Southbank	\$3,100,000
Hogan's Creek Greenway	Park/Recreation	Periphery	\$8,200,000
I-95 Overland Bridge Reconstruction	Infrastructure	Southbank	\$182,000,000
Laura Street Transfer Station Business Center	Office	Periphery	\$2,000,000
Metropolitan Park Improvements	Park/Recreation	Sports Complex	\$8,200,000
Riverside Arts Market Extension	Park/Recreation	Riverside/Brooklyn	\$1,800,000
San Marco Blvd. Reconstruction	Infrastructure	Southbank	\$1,500,000
Southbank Riverwalk	Park/Recreation	Southbank	\$15,000,000
Wolfson Children's Hospital/Adult Tower	Hospital	Southbank	\$200,000,000
14 Projects Proposed			\$513,850,000

85 Total Downtown Projects

\$2,260,497,000

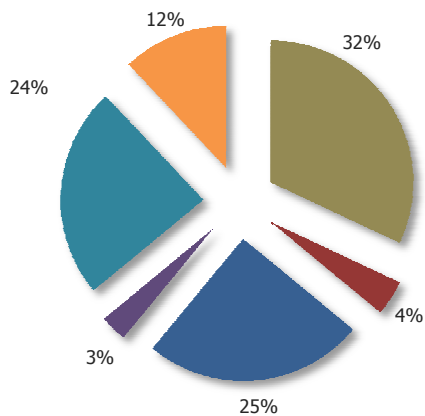




Downtown Investment by Area

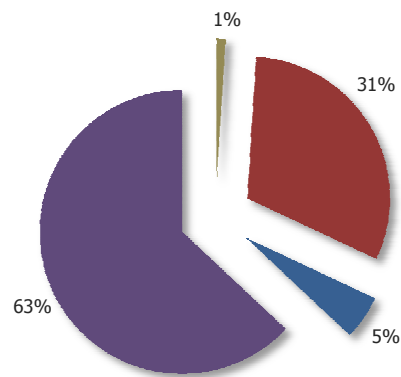
Source: Downtown Vision, Inc.

Completed Development



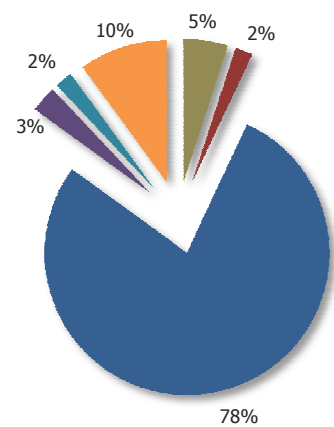
- Downtown Core
- Downtown Periphery
- Southbank
- LaVilla
- Sports Complex
- Riverside/Brooklyn

Projects Under Construction



- Downtown Core
- Downtown Periphery
- Southbank
- LaVilla
- Sports Complex
- Riverside/Brooklyn

Proposed Projects



- Downtown Core
- Downtown Periphery
- Southbank
- LaVilla
- Sports Complex
- Riverside/Brooklyn

Downtown Residential Market

In 2009, the Downtown residential market remained static in terms of number of units available. An estimated 2,700 residents occupy 2,365 residences in Downtown.

Occupancy of Downtown rental units dropped from 86% in 2008 to 82% in 2009, while the average price per square foot for rent dropped from \$1.40 to \$1.30.

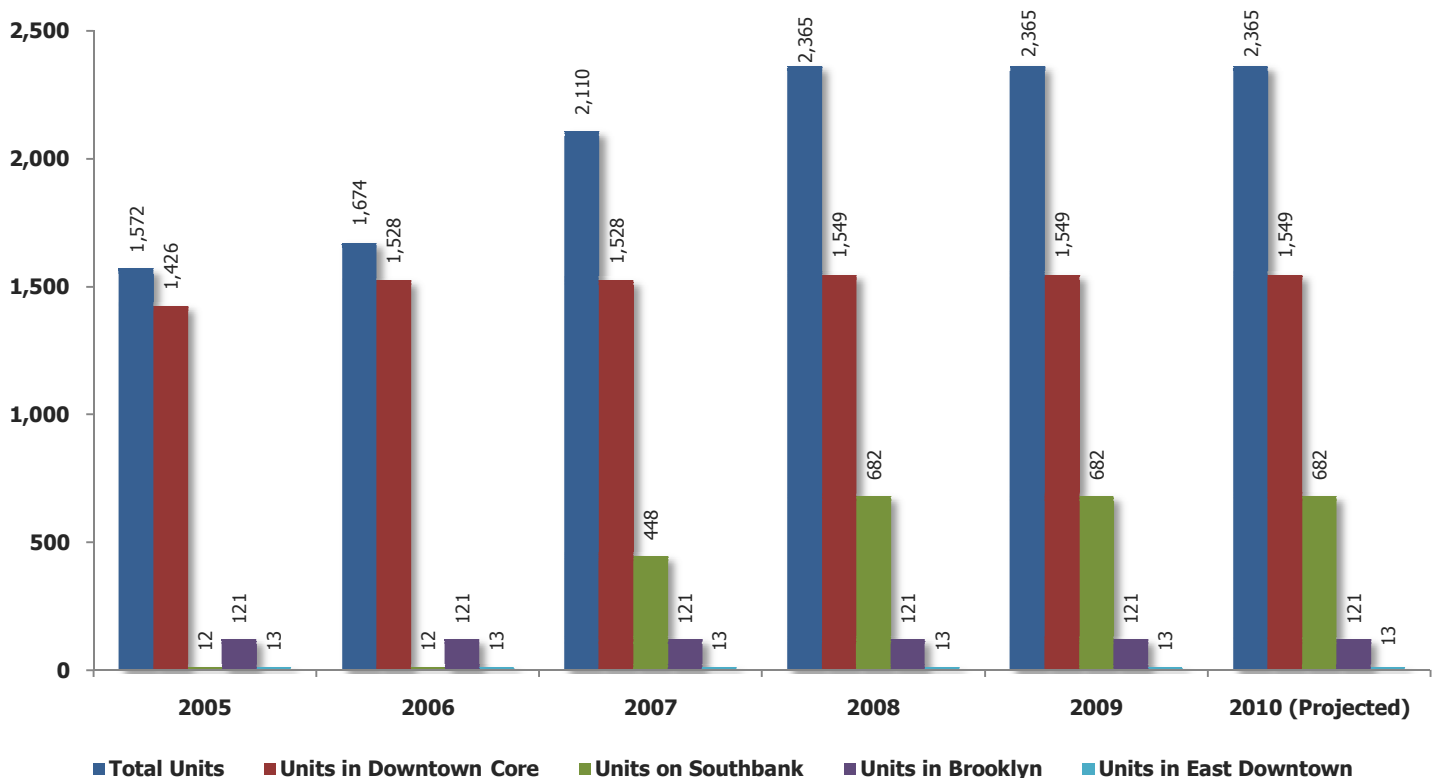
Residential sales, as expected, experienced the biggest downturn, with only 45 units sold in 2009 compared to 212 units in 2008. Average price per square foot for sales dropped from \$300 in 2008 to \$192 in 2009, primarily due to short sales and lower real estate values.

The City of Jacksonville is currently focusing on reuse of existing buildings for affordable live/work artist space to continue to grow the number of residents living Downtown.



Units Available in Downtown by Year

Source: City of Jacksonville Property Appraiser & Downtown Vision, Inc.



Downtown Housing Summary

Source: Downtown Vision, Inc.

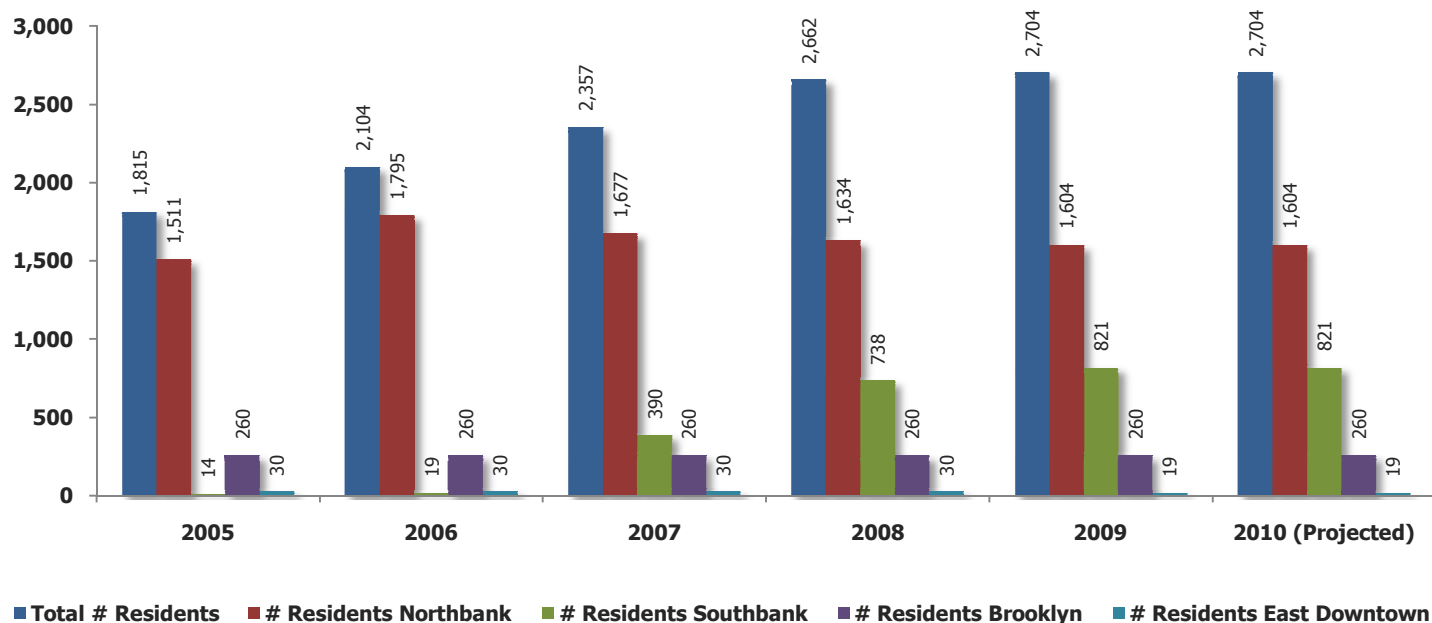
Available Units in 2009	# Units	Lease/Sale
11 E. Forsyth	127	For Lease
Cathedral Residences (senior living)	632	For Lease
Churchwell Lofts at East Bay	21	For Sale
Home Street Lofts	12	For Sale
Parks at the Cathedral	51	For Sale
Residences at City Place	205	For Sale
San Marco Place	141	For Sale
Single Family Homes (low income)	134	For Sale
Stephens Duval (senior living)	58	For Lease
The Carling	99	For Lease
The Metropolitan	118	For Lease
The Peninsula at St. Johns	234	For Sale
The Plaza Condominiums at Berkman Plaza	206	For Sale
The Strand at St. Johns	295	For Lease
The Townhomes at Berkman Plaza	20	For Sale
W. A. Knight Lofts	12	For Lease
Total Units Available	2,365	

Proposed Projects	# Units	Lease/Sale
20 W. Adams	20	For Lease
200 Riverside	250	For Sale
Total Units Proposed	270	

Total Units	2,635
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Estimated Number of Downtown Residents by Year ³

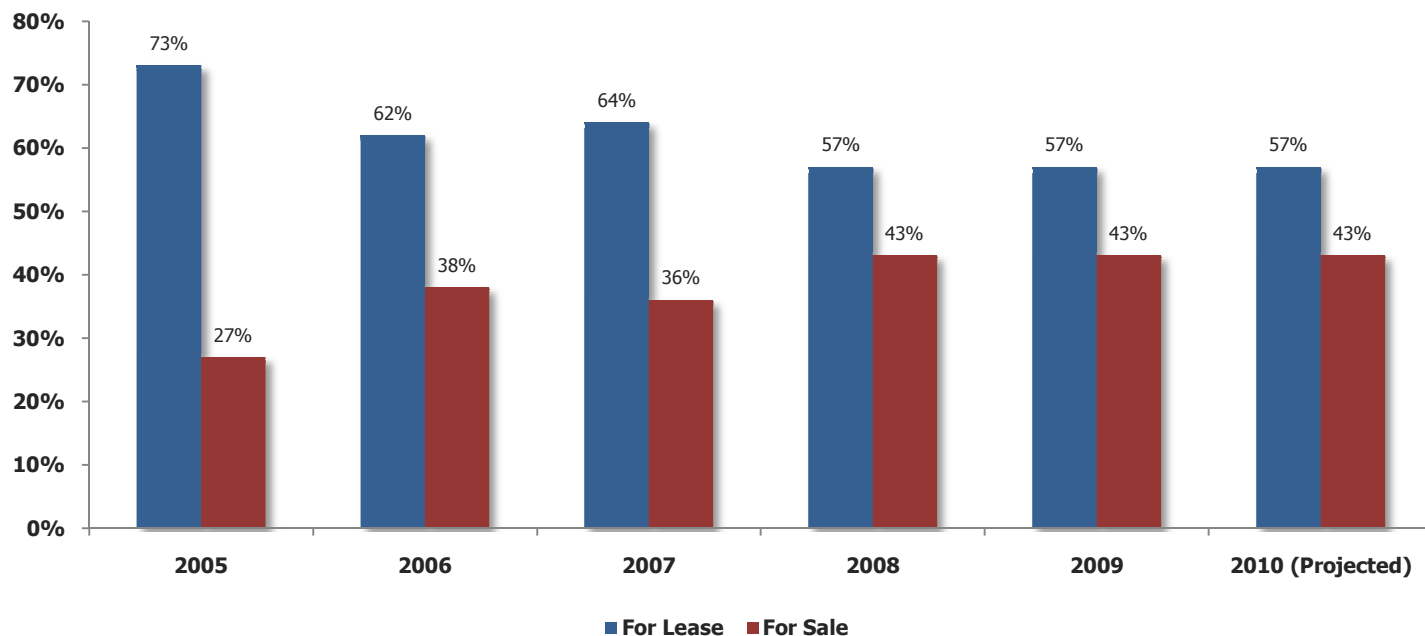
Source: Downtown Residential Communities & Downtown Vision, Inc.



³ Based on counts provided by individual communities, or 1.6 residents per occupied unit in communities which did not give a count of residents. There are currently no residents in LaVilla.

For Lease & For Sale Units Available in Downtown by Year

Source: City of Jacksonville Property Appraiser, Downtown Residential Communities & Downtown Vision, Inc.



Downtown Residences for Lease ⁴

Source: Downtown Residential Communities

	2005	2006	2007	2008	2009
# Units Available	238	356	651	651	651
% Leased	72%	72%	71%	86%	82%
Average Price per Square Foot	\$1.32	\$1.21	\$1.36	\$1.40	\$1.30
Median Price per Square Foot	\$1.40	\$1.24	\$1.28	\$1.41	\$1.32
Price per Square Foot Range	\$1.24-\$1.40	\$1.10-\$1.40	\$1.05-\$1.57	\$1.10-\$1.57	\$1.00-\$1.43

Downtown Residences for Sale ⁵

Source: City of Jacksonville Property Appraiser's Office

	2005	2006	2007	2008	2009
# Units Available	289	289	635	890	890
# Sales/Resales	78	41	250	212	45
% Total Units Sold from Developer	91%	96%	82%	80%	85%
Average Price per Square Foot	\$278	\$274	\$198	\$300	\$192
Median Price per Square Foot	\$266	\$283	\$232	\$318	\$162
Price per Square Foot Range	\$150-\$591	\$95-\$370	\$96-\$368	\$75-\$565	\$75-\$345

⁴ Does not include low income or senior living residences.

⁵ Does not include low income or senior living residences.

Downtown Office Market & Employment



Downtown Jacksonville is home to 7.3 million square feet of commercial office space (31% of the office space in the region), more than 1,100 businesses, a *Fortune 500* headquarters, CSX, major company headquarters including Fidelity National Financial, Rayonier and Stein Mart and an estimated 51,000 employees.

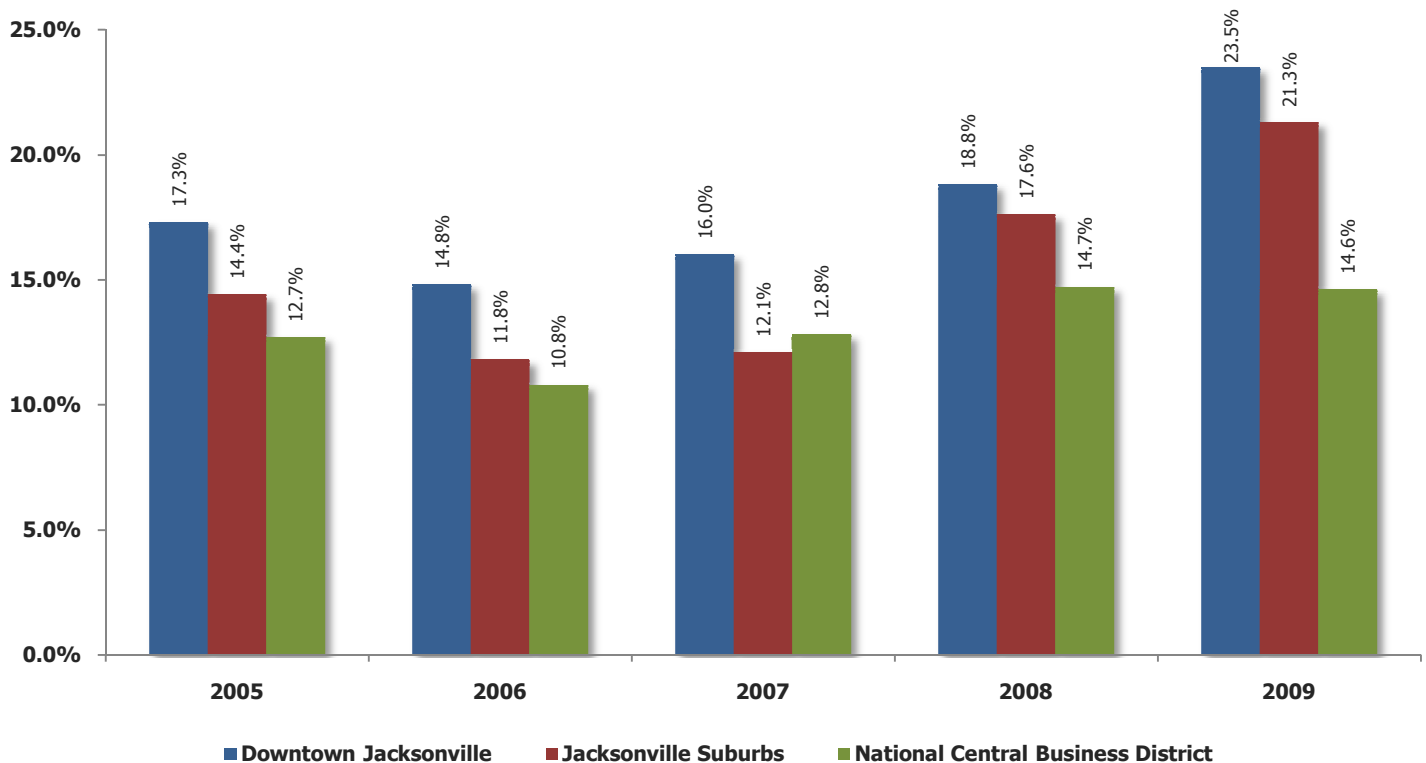
The Downtown office market finished the year with an office vacancy rate of 23.5%. In 2009, Downtown's net absorption was -77,000 square feet, and average asking lease rates were \$19.41 per square foot.

High unemployment rates and competition from the suburbs continued to challenge the Downtown office market and employment, despite Downtown's central location and convenience to mass transit.

Recognizing the need to fill these spaces, the City of Jacksonville and Downtown Vision are working with the Jacksonville Chamber of Commerce, Downtown stakeholders and other partners to find creative uses to fill these spaces and increase employment Downtown.

Jacksonville Area Office Vacancy Rates ⁶

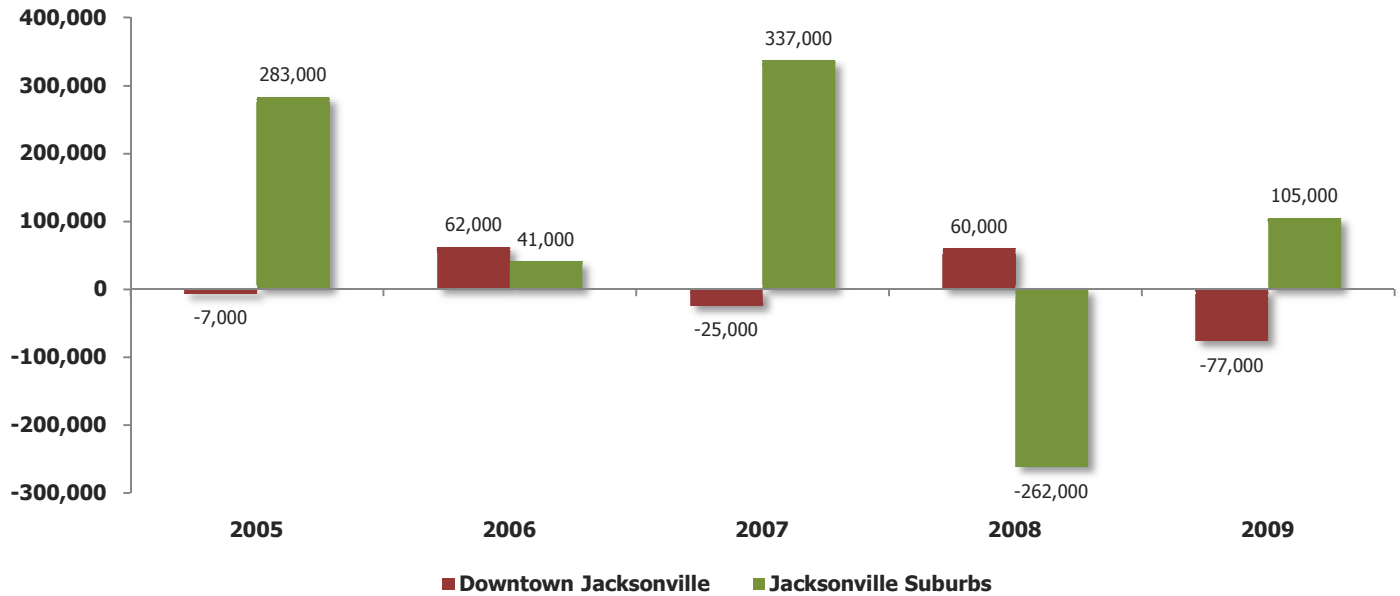
Source: CB Richard Ellis



⁶ All figures based on 4th quarter reports.

Jacksonville Area Net Office Space

Source: CB Richard Ellis



Top Downtown Building Sales in 2009

Source: CB Richard Ellis

Address	Buyer	Price per Square Foot	Total Price	Square Feet	Close Date
Dyal Upchurch 6 E. Bay St.	A. Duda & Sons, Inc.	\$89.60	\$3,727,500	41,600	02/2009
River Watch at City Centre 76 S. Laura St.	Parador Laura Street Offices, LLC	\$29.62	\$5,775,000	195,000	09/2009

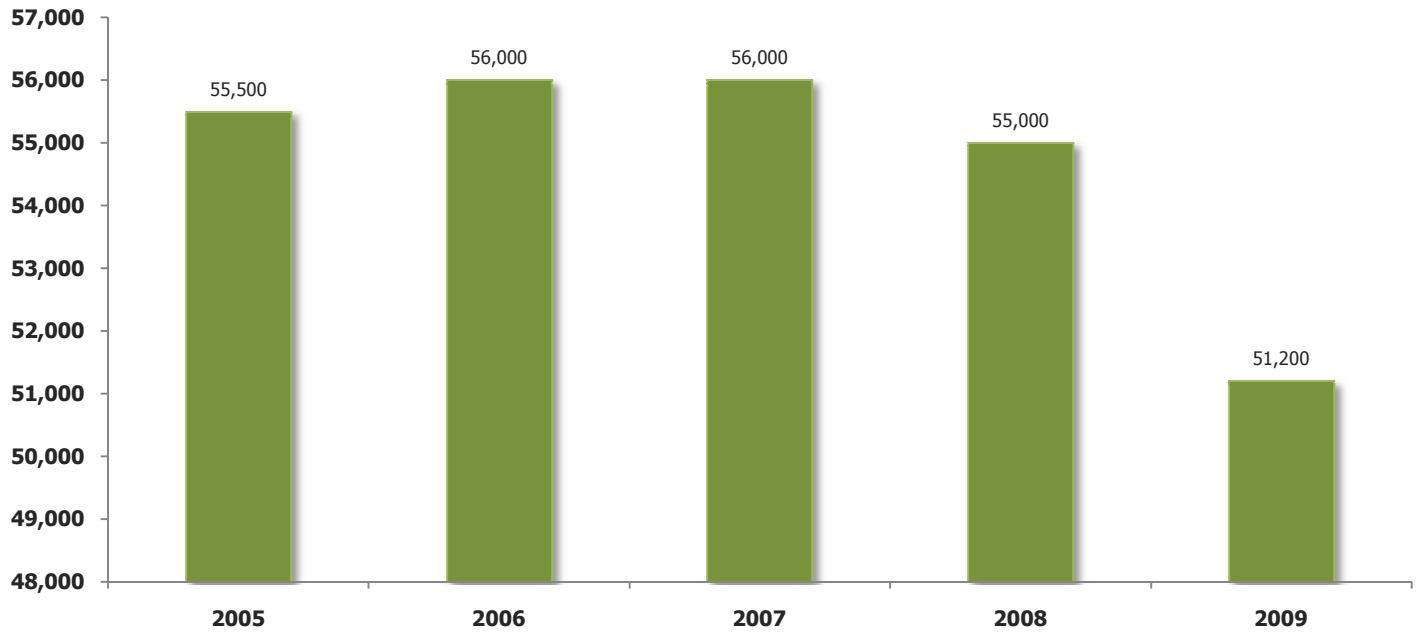
Downtown Building Leases for More Than 10,000 Square Feet in 2009

Source: CB Richard Ellis

Tenant	Address	Square Feet	Close Date
Lender Processing Services	532 Riverside Ave.	86,995	4 th Quarter
Marks Gray, P.A.	1200 Riverplace Blvd.	21,000	1 st Quarter
Smith, Gambrell & Russell, LLP	50 N. Laura St.	19,026	3 rd Quarter
Caci, Inc.	50 N. Laura St.	16,989	3 rd Quarter
Not Available	1301 Riverplace Blvd.	15,368	2 nd Quarter
Not Available	50 N. Laura St.	13,690	4 th Quarter
Homeowners Mortgage	225 Water St.	11,341	2 nd Quarter
Talagy	245 Riverside Ave.	10,989	3 rd Quarter
Select Quote	701 San Marco Blvd.	10,863	4 th Quarter
The Community Foundation	245 Riverside Ave.	10,032	3 rd Quarter

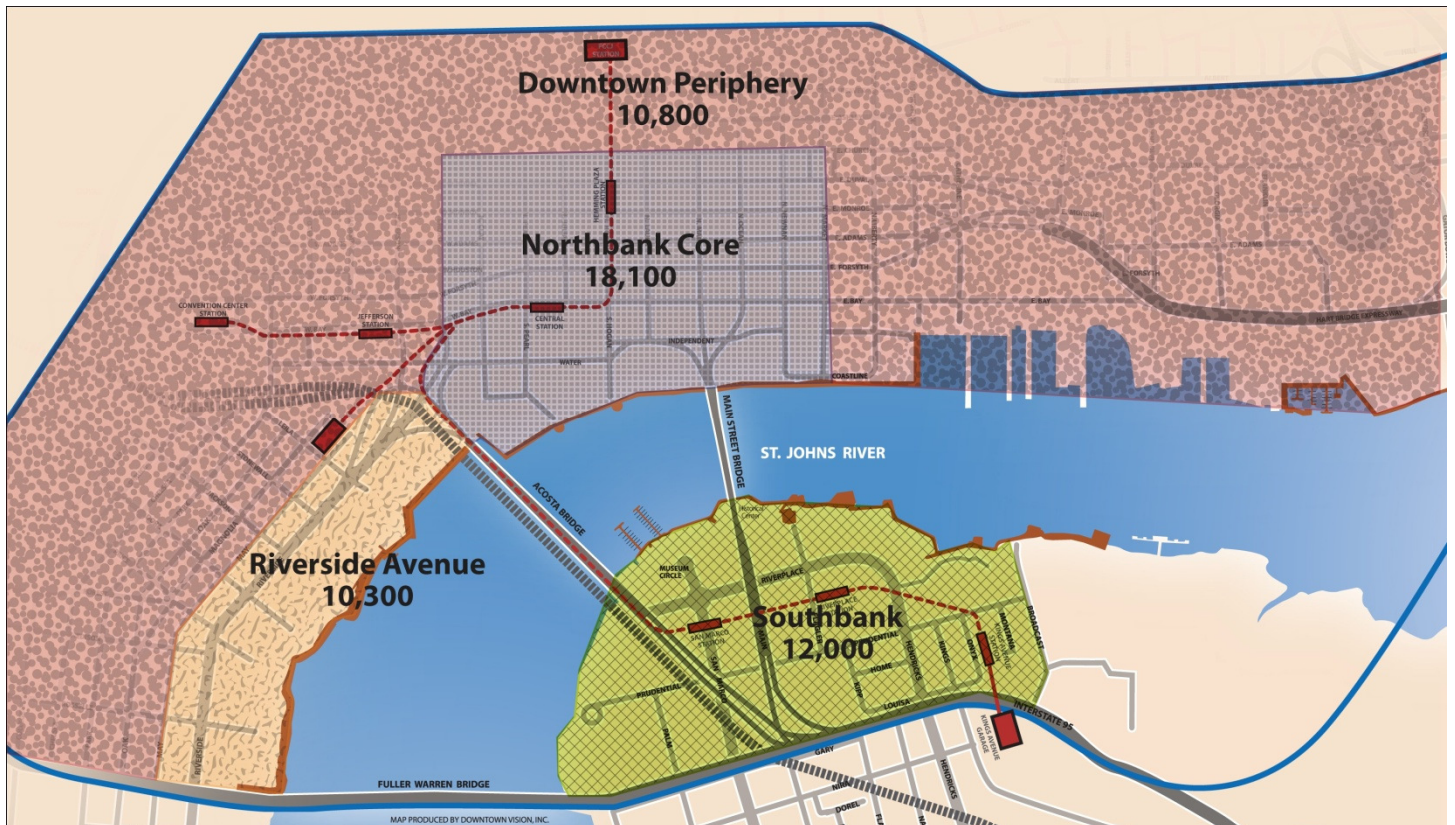
Estimated Downtown Employment by Year

Source: Downtown Building Managers & Downtown Vision, Inc.



Estimated Downtown Employment by Area

Source: Downtown Vision, Inc.



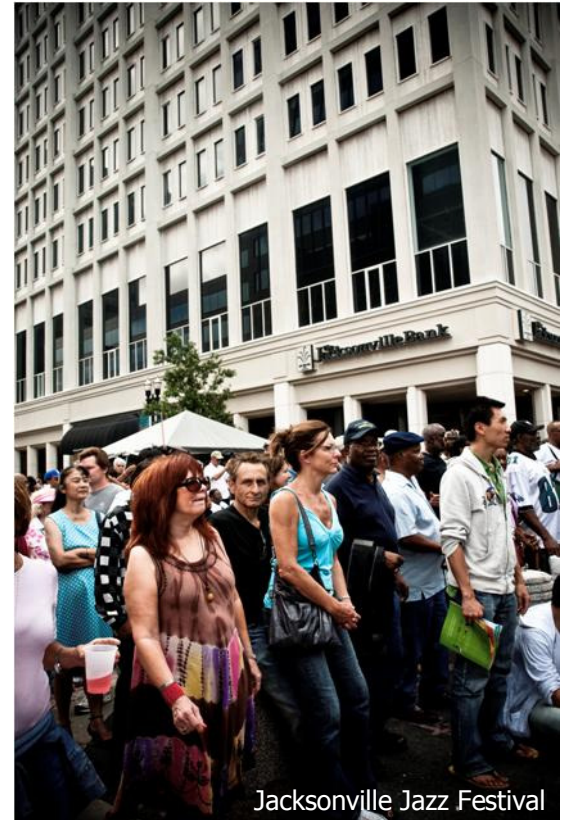
Downtown Culture & Entertainment

Downtown event attendance remained static in 2009, with more than 12.5 million visits to Downtown venues and events.

The primary drivers for visits to Downtown were The Jacksonville Landing (32%), special events (14%), business (10%), events and activities at the Sports Complex (8%), professional sports events (7%) and the Main Library (7%).

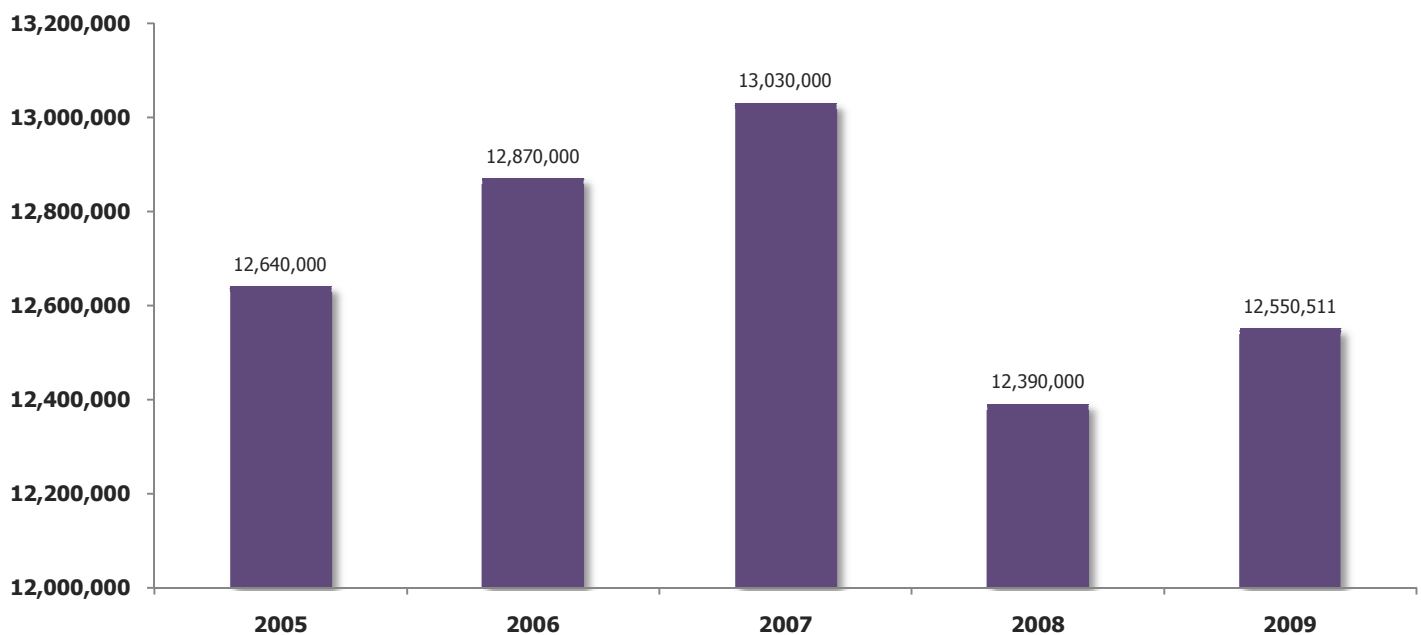
The new Riverside Arts Market drew half a million visits in 2009, while the Baseball Grounds of Jacksonville drew 38% more visits due to playoff games. Attendance also increased at Downtown special events by 12% and Veterans Memorial Arena by 9%.

The City of Jacksonville is working on several initiatives to improve public access along the St. Johns River in Downtown, including refurbishing the Southbank Riverwalk, restoring Friendship Fountain and making Friendship Park more pedestrian-friendly, redeveloping portions of Metropolitan Park and Kids Kampus to reorient the parks to the river, and adding floating docks to the Riverside Arts Market to improve boater and water taxi access.



Estimated Visits to Downtown by Year

Source: City of Jacksonville Office of Special Events, Downtown Venues, Downtown Vision, Inc. & SMG



Estimated Visits to Downtown by Category

Source: City of Jacksonville Office of Special Events, Downtown Venues, Downtown Vision, Inc. & SMG

	2005	2006	2007	2008	2009
Professional Sports Team Events	979,708	995,683	1,049,314	887,441	875,891
Special Events	1,945,457	1,353,404	1,480,000	1,509,300	1,697,160
Sports Complex Facilities	982,417	955,686	945,251	892,203	1,008,633
Theatres & Performing Arts Centers	644,479	743,521	585,270	505,863	505,898
Museums & Galleries	321,975	284,000	267,374	242,525	243,607
The Jacksonville Landing	4,100,000	4,500,000	4,500,000	4,050,000	4,000,000
Main Library	337,855	771,141	807,745	894,182	932,633
Riverside Arts Market	----	----	----	----	500,000
Nightlife Venues	256,000	275,000	300,000	300,000	325,000
Churches	821,200	821,200	821,200	821,200	603,000
Business	1,435,200	1,435,200	1,435,200	1,435,200	1,200,000
Convention Center	233,517	227,096	159,554	203,991	147,889
Hotels	587,068	612,959	675,277	643,607	510,800

Estimated Attendance by Facility for Major Sports, Cultural & Entertainment Venues

Source: City of Jacksonville Office of Special Events, Downtown Venues, Downtown Vision, Inc. & SMG

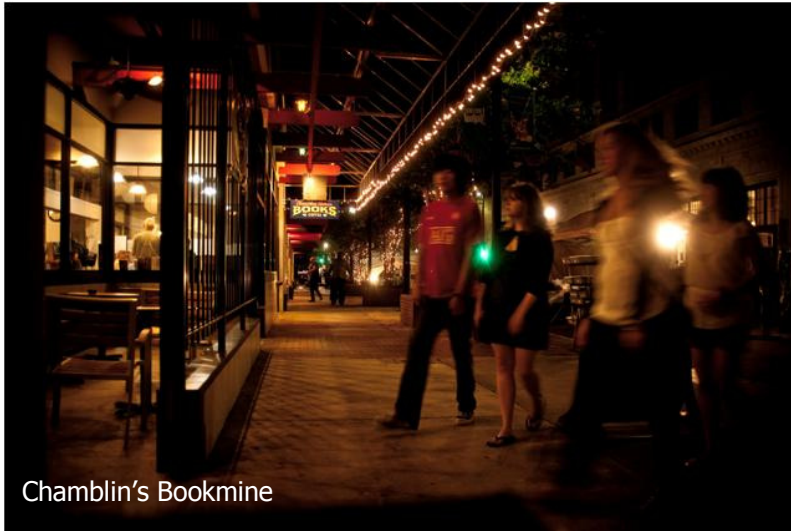
	2005	2006	2007	2008	2009
Baseball Grounds of Jacksonville	432,636	503,348	458,733	430,039	595,093
Florida Theatre	300,000	380,000	187,448	196,000	200,000
Jacksonville Expo Center at the Fairgrounds	590,000	445,000	450,000	450,000	437,460
Jacksonville Landing	4,100,000	4,500,000	4,500,000	4,050,000	4,000,000
Jacksonville Municipal Stadium	839,949	943,143	938,918	790,644	726,240
Main Library	337,855	771,141	807,745	894,182	932,633
Metropolitan Park	257,700	199,850	189,100	180,850	151,500
MOCA Jacksonville	42,212	58,000	34,926	47,000	55,070
Museum of Science & History	206,763	165,000	173,448	136,525	163,137
Northbank & Southbank Riverwalks	150,000	150,000	150,000	150,000	150,000
Riverside Arts Market	----	----	----	----	500,000
Ritz Theatre & LaVilla Museum	22,000	22,000	23,175	21,476	21,476
Times Union Center for the Performing Arts	315,814	341,521	375,822	288,387	284,422
Veterans Memorial Arena	431,840	474,652	407,814	378,111	411,691

Estimated Attendance at Downtown Special Events

Source: City of Jacksonville Office of Special Events, Downtown Venues, Downtown Vision, Inc. & SMG

	2005	2006	2007	2008	2009
Blessing of the Fleet	5,000	3,000	3,000	3,000	3,000
World of Nations Celebration	75,000	60,000	60,000	75,000	80,000
Jacksonville Jazz Festival	60,000	12,000	15,000	12,500	50,000
Sail Jacksonville	----	----	30,000	----	40,000
Spring Music Festival	10,000	10,000	5,000	----	----
Freedom, Fanfare & Fireworks	215,000	156,000	250,000	200,000	250,000
Florida-Georgia Football Classic	100,000	100,000	100,000	125,000	200,000
Jacksonville Light Parade	150,000	130,000	130,000	130,000	200,000
New Year's Eve Celebration	75,000	75,000	75,000	75,000	50,000
Gator Bowl Parade	100,000	100,000	100,000	100,000	100,000
Jacksonville Fair	493,457	445,404	450,000	400,000	437,460
Make a Scene Downtown Events	----	----	----	----	21,700
Downtown Vision Events	45,000	45,000	60,000	60,000	60,000
Miscellaneous Downtown Events	632,000	230,000	240,000	205,000	205,000

Downtown Retail, Restaurants & Nightlife



More than 90 restaurants, 20 bars and 95 retailers and service providers are located Downtown.

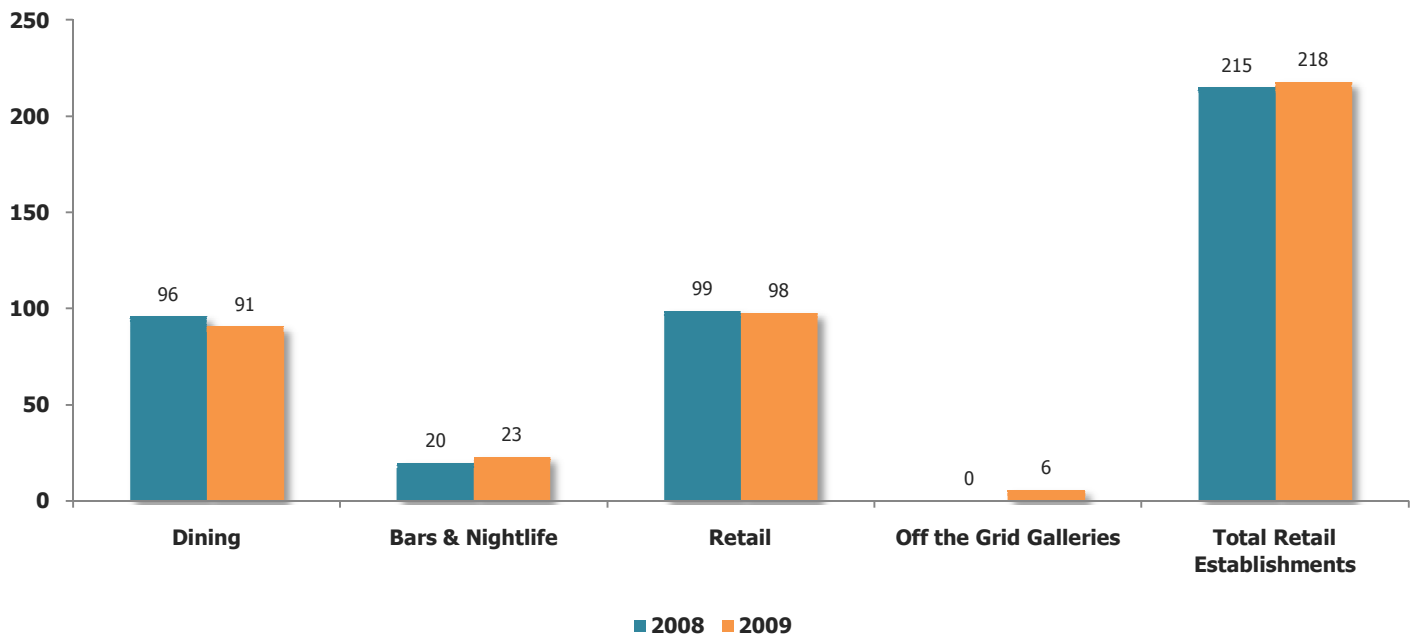
From January, 2009 through February, 2010, Downtown experienced a net loss of three retailers, restaurants or bars. However, that loss was offset by the opening of six new *Off the Grid* galleries, a partnership between Downtown Vision, the Cultural Council, Downtown property owners and local artists to establish temporary gallery/work spaces in vacant retail store fronts. These galleries opened in key retail locations including the Bryant building, the Elks building, the Jacksonville Bank building and The Jacksonville Landing.

Significant openings between January, 2009 and February, 2010 included four new bars (City Hall Pub, Dos Gatos, Lit and The Sinclair), three new casual dining restaurants (Chicago Pizza & Grille, Cinco de Mayo and Village Bread Café), and a new office furniture store (Perdue Office Interiors). Significant closings in 2009 included Plaza III Steakhouse, Shelby's Coffee Shoppe, Starbucks at 11 E., The Wine Bar – Southbank and Worman's Deli.

With the arrival of Dos Gatos and Lit, there are now eleven bars and evening restaurants open within a two-block radius of the Florida Theatre and The Jacksonville Landing, creating an emerging entertainment district.

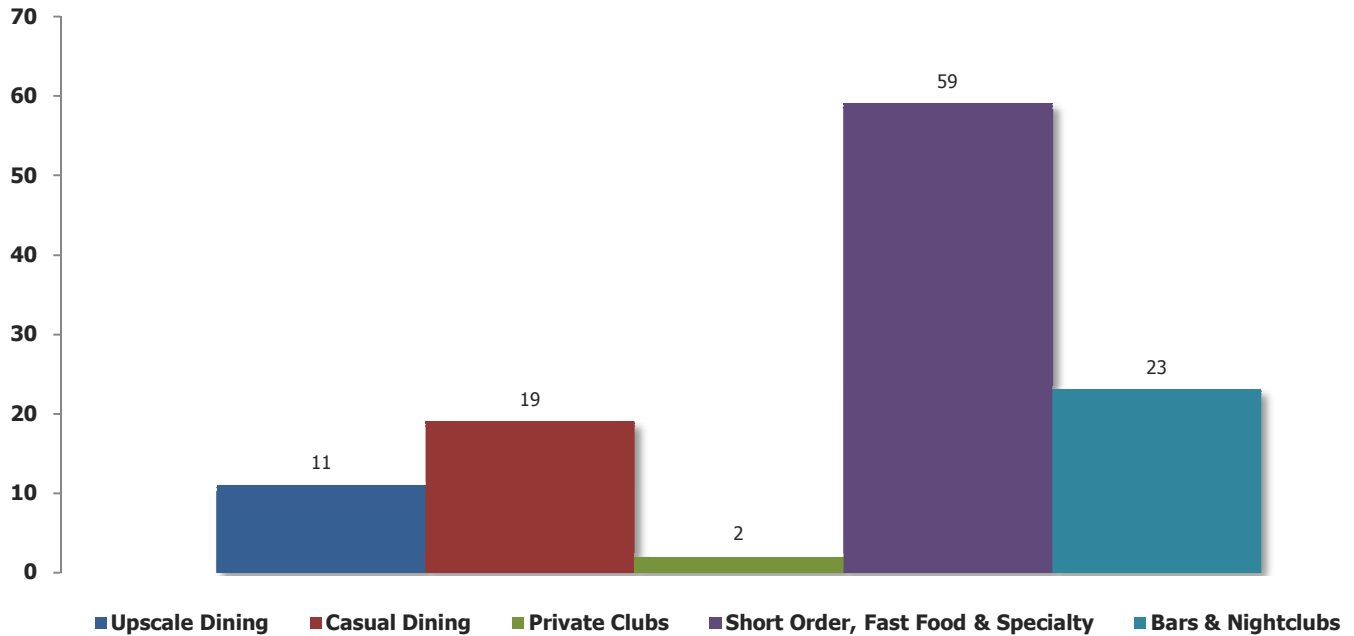
Total Downtown Retail, Restaurants & Nightlife

Source: Downtown Vision, Inc.



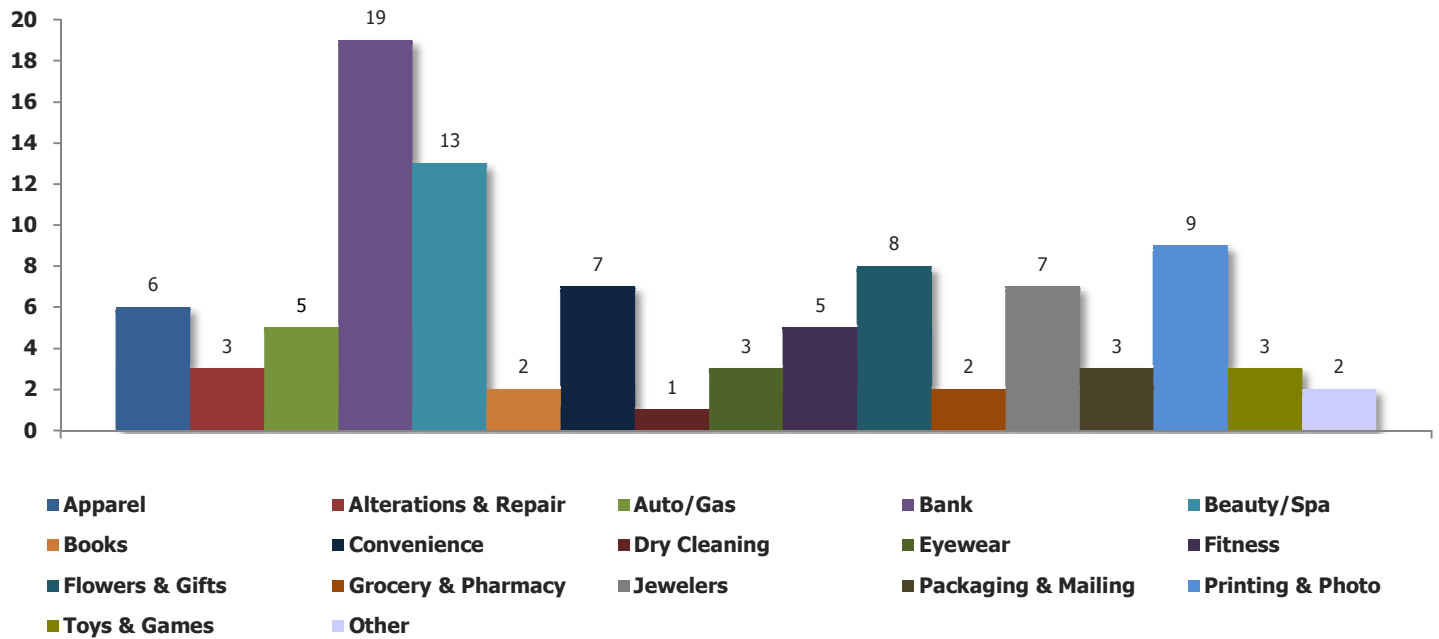
Downtown Restaurants & Nightlife by Type

Source: Downtown Vision, Inc.



Downtown Retail & Services by Type

Source: Downtown Vision, Inc.



Downtown Hotels & Conventions

Downtown's hotel occupancy dropped in 2009 to 56% as a result of a slow economy and fewer corporate travelers. Currently, Downtown is home to 2,153 hotel rooms.

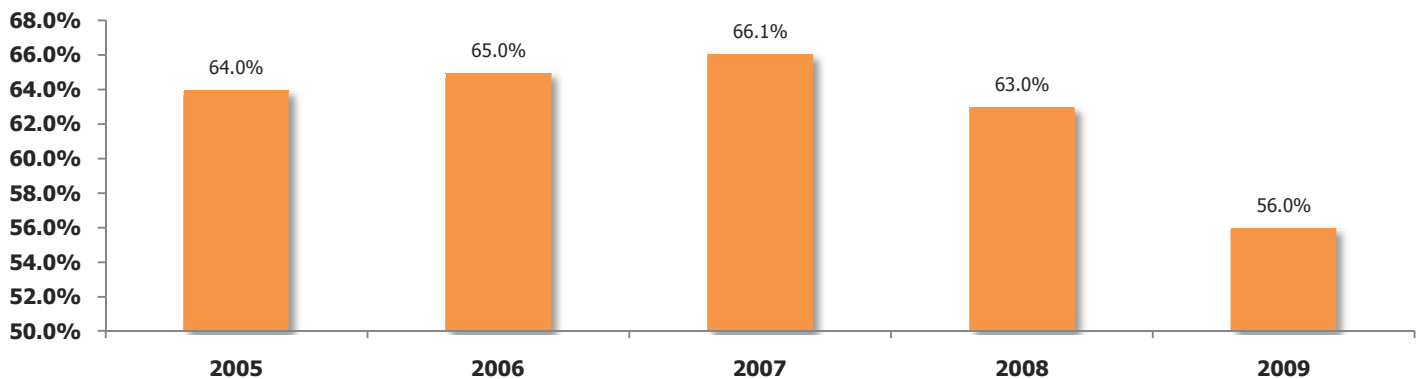
In 2009, attendance at the Prime Osborn Convention Center dropped by 28% from 2008 to 147,889.

Jacksonville hospitality leaders have formed the Jacksonville Convention Center Alliance to increase hotel occupancy and convention business in 2010.



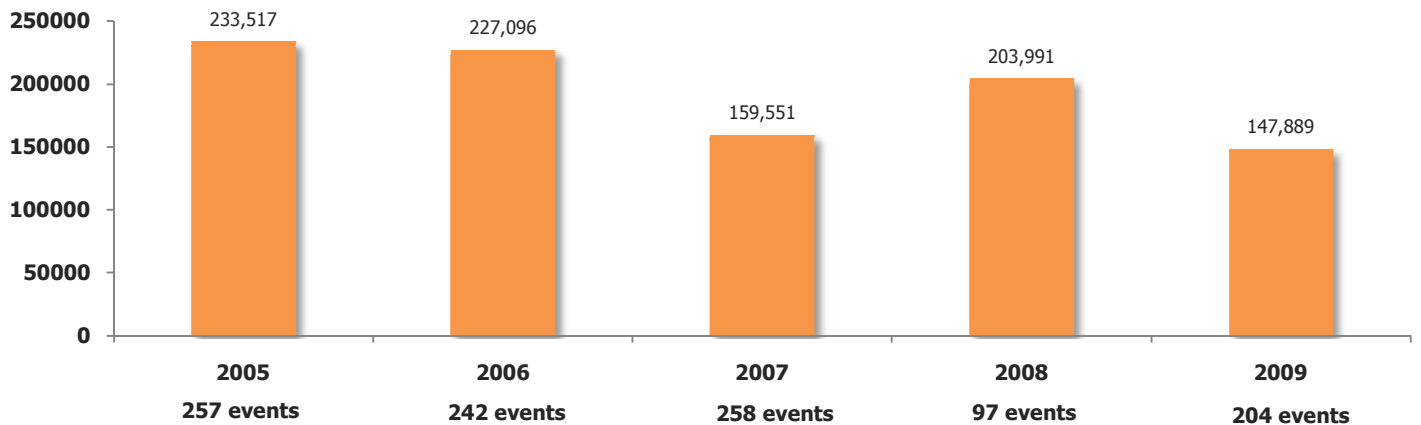
Estimated Downtown Hotel Occupancy by Year

Source: Downtown Hotels



Convention Center Attendance by Year

Source: SMG



Downtown Parking & Transportation



Downtown Jacksonville has more than 44,000 parking spaces, with approximately 20,000 spaces in the Downtown core. Collier's International's *2009 CBD Parking Rate Survey* rates parking in Downtown Jacksonville as "fair" (parking garages 60-80% full on weekdays). Downtown parking rates remain significantly lower than the national average.

The City of Jacksonville has focused parking efforts to improve signage on public garages and test new smart parking meters.

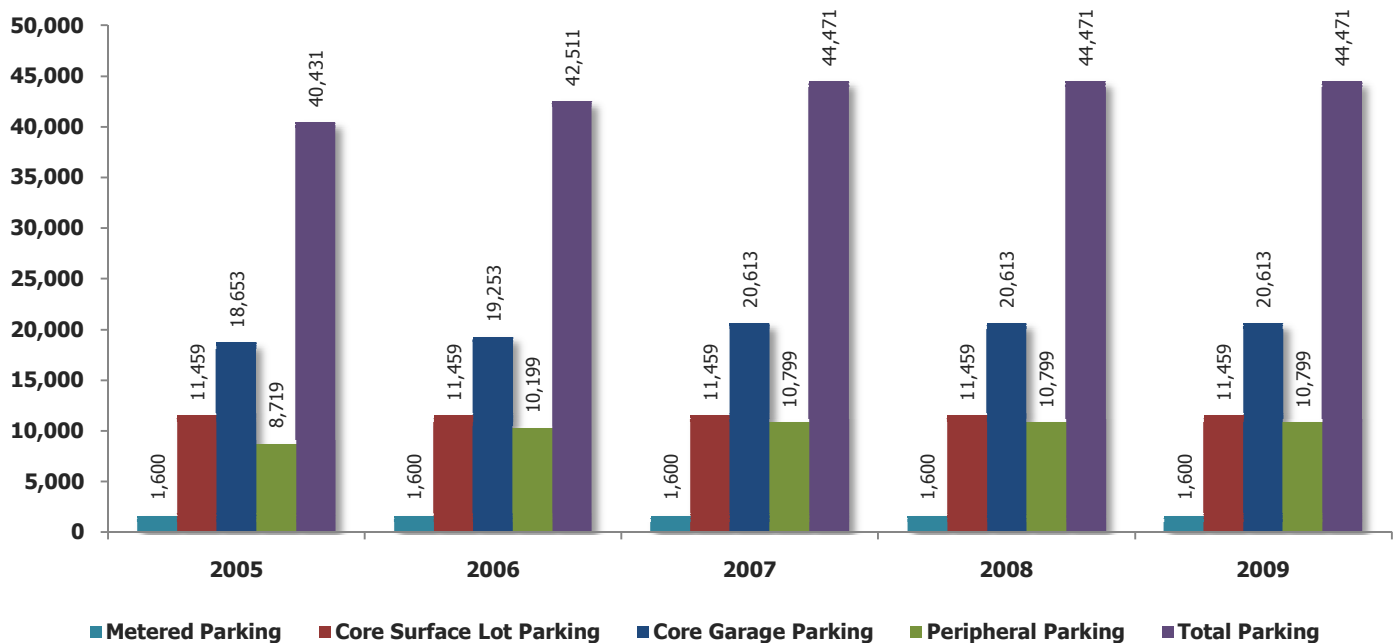
Parking Rates for Garage Parking in Downtown Core & Peripheral Locations

Source: Colliers International & Downtown Parking Operators

	Downtown Jacksonville Median Rates	National Average
Core Monthly Non-reserved	\$94.54	\$154.23
Core Monthly Reserved	\$127.50	\$188.75
Core Daily	\$8.70	\$15.96
Core Hourly	\$1.47	\$5.57
Core Hourly Metered Parking	\$0.50	N/A
Peripheral Monthly	\$27.00	N/A

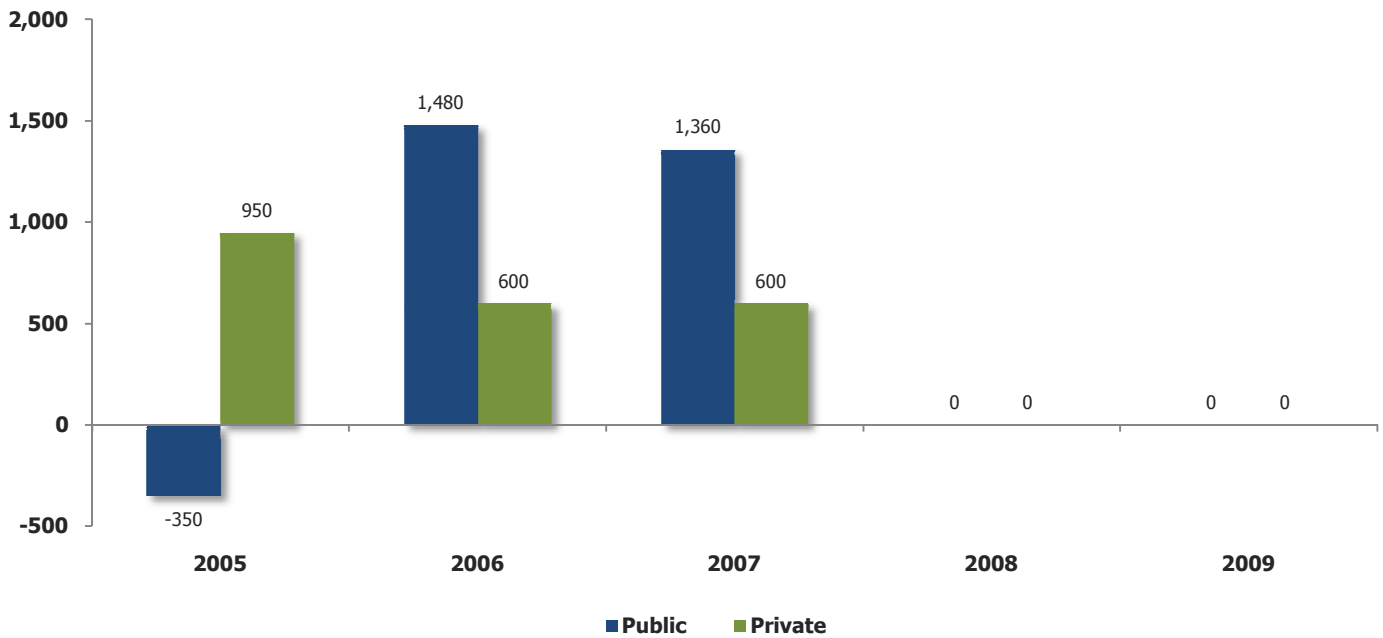
Overview of Downtown Parking Spaces Available by Year

Source: Downtown Building Managers, Downtown Parking Operators & Downtown Vision, Inc.



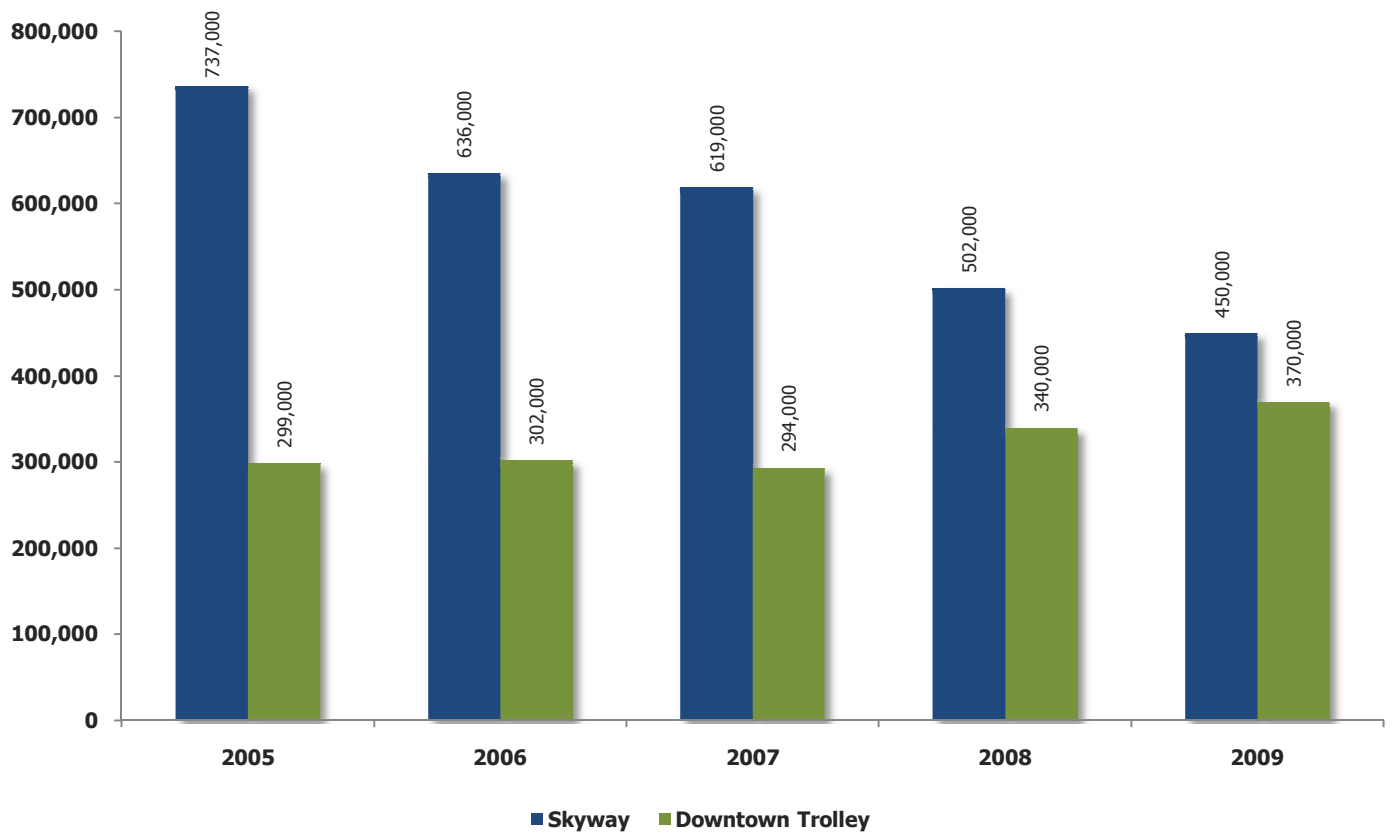
Downtown Public & Private Parking Net Gain/Loss by Year

Source: Downtown Parking Operators, Downtown Building Managers & Downtown Vision, Inc.



Annual Transit Ridership in Downtown

Source: Jacksonville Transportation Authority



Credits

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SMG

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