



May 21, 2024

Clay County Agricultural Fair
2493 State Road 16W
Green Cove Springs, FL 32043

Clay County Board of County Commissioners
P.O. 1366
Green Cove Springs, FL 32043

Dear Clay County Board of County Commissioners,

A recent national fair convention stated: “what Fairs do matters.” Nowhere is this more evident than our Clay County Agricultural Fair. What we provide economically, what we provide for our community, and the intrinsic value our fair brings to our county is second to none. Not only has the Clay County Agricultural Fair’s reputation made a mark within our region, but it has also earned state level and national level recognition. Our Fair is truly “the people’s and community’s fair.”

Recognizing the Fair’s importance to our community along with our county’s ongoing growth, the Clay County Fair Board of Directors launched an in-depth strategic plan analysis in 2020 focused on how best to accommodate our projected future needs. To determine our future needs, the Board of Directors initiated a third-party feasibility study with two phases – (1) a market research study and (2) a master plan including a financial feasibility analysis. In October 2021, K/O Fairground Planners and Crossroads Consulting Services completed and issued a Market Analysis study report (attached) to the Fair’s Board of Directors.

The Market study included a comprehensive analysis of local market conditions, historical operations, the competitive landscape, present site conditions, and market assessment. The market study identified “Fair attendance is reaching a point where overall fair operations and attendee experience are beginning to be hindered by the Fairgrounds layout and the conditions of the Fairground.” It further stated without significant improvements and expansion to accommodate growth, “the Fair may expect to reach a point that it experiences an attrition rate of at least 5% annually in attendance and a corresponding decrease in revenue “. Other key findings of the market analysis included:

- Fairgrounds layout not considered ideal in terms of functionality.
- Fairgrounds facilities are “tired” with 80% of buildings either in poor or acceptable condition requiring improvements or replacement in the next 5-10 years.
- Significant accessible enhancements needed including ingress/egress to the Fairgrounds.
- Substantial infrastructure upgrades needed for plumbing, lighting, and power.
- Fairgrounds is unlikely able to successfully accommodate the county growth, requiring the Fair to limit admission.

In the past two years, the Fair has indeed experienced some of the findings in the Marketing Analysis especially from the impact of growth driving the need of functional layout improvements



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and infrastructure enhancements. The Fair Board of Directors acknowledges the need to expand the internal operations of the fair is becoming a reality and necessity. Also recognized is that any changes done to the fairground's infrastructure or expansion of the fair layout will also impact parking. Therefore, concurrent development and expansion for both parking and internal layout operations is needed to keep up with our fairgoers' growth.

The market analysis study also conducted a competitive landscape review to understand the existing supplies of similar venues in the area. The study identified "if no improvements are made to the Clay County Fairgrounds, while other facilities in the region continue to improve their assets, it is likely that the Fairgrounds will experience a decrease in non-Fair activity and related revenues." Additionally, from a Fair focused activity perspective, the study revealed if the Greater Jacksonville Agricultural Fair & Expo Center relocated to a site near the Jacksonville Equestrian Center, then it potentially will dilute market share and impact attendance at our Fair. Since the release of the study, the Greater Jacksonville Agricultural Fair has in fact announced their move to the proximity of the Equestrian Center and are in the midst of development.

The Clay County Agricultural Fair Board of Directors clearly recognizes that a "status quo" scenario is not in the best interest of the Fair and its future, as well as not in the interest of the overall Fairgrounds operations. During the Market Analysis, the K/O Fairground Planners and Crossroads Consulting Services briefly considered various future scenarios and/or options for our Fair, including the ideal Fair layout and program on the existing site with major enhancements, a brand-new site to develop the ideal Fair layout, or using the present existing site with only modifications and improvements. The study recommended for our future Fair needs, that our ideal site would require a total of two hundred acres with 40-50 acres of it dedicated to parking and the remaining acreage for our Fair operations.

As outlined, our feasibility study involved two phases, however, in order to move into the most important and critical phase of developing a master plan and financial feasibility analysis, the Board of Directors recognized the need to define the Fair's future involving the Fairgrounds site options. With this in mind, over the past several months, we have had preliminary discussions with County staff as well as the Tourist Development Council, who also authorized funding to assist the Fair Association in the initial Market Analysis Study.

Currently, the County owns approximately seventy-one acres that include the Fairgrounds main infrastructure buildings and two parking lots. Whereas the Fair Association owns approximately fifty-eight acres surrounding the main infrastructure of the Fairgrounds. The County maintains the Fairgrounds infrastructure on a year-round basis and leases the Fairgrounds to the Fair Association to run our annual fair. To address the concerns outlined in our Market Analysis Study and to move us towards a long-term solution, the Fair Board of Directors do have interest in either a long-term lease of the Fairgrounds with their managing year-round operations or exploring a lease to own option for the Fair Association or any other direction a collaborative team may recommend. We are seeking the County Commissioners authorization to create a collaborative team and partnership of the Clay County staff and Clay County Fair Board of Directors to analyze and propose options for the County Commissioners consideration.



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The Clay County Agricultural Fair has enjoyed years of being the best fair in the Northeast Florida region. We pride ourselves on a safe, clean, family friendly and entertaining event. Each spring when the Fair opens its gates, an energy exists within our community like no other event in the county. Our community loves their hometown fair! In order to sustain our reputation as the "people's and community's fair", it is essential to develop planning actions and take steps now. We look forward to our partnership and working with the County to identify the best options on meeting the future challenges for the Fair and Fairgrounds.

Sincerely,

Kelly Mosley, Chair

Bill Elrod, Vice Chair

Bob Olson, Treasurer

Zach Lassiter, Secretary

Tasha Hyder, Exec Dir

Rebecca Bailey, Director

Bruce Butler, Director

Kimberly Middleton, Director

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Michael Rathjen, Director

Katie Whitehead, Director

Beverly Whitener, Director

Sandra Wilson, Director

Johnny Mack Smith, Director

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Mike Cella, District 1
Alexandra Compere, District 2
Betsy Condon, District 4
Kristen Burke, DC, District 5
Howard Wannamaker, County Manager

Enclosure: Clay County Fair Market Analysis Study