4 Coastal Land Uses

OVERVIEW

From the 1800s and 1900s, early pioneers of Pinellas County settled primarily on sheltered coastal areas convenient to the boats connecting the isolated peninsula with other points in Florida. These settlers were attracted to Pinellas County because of its sunny, healthy climate and its plentiful supply of available land. As the population of the United States acquired more leisure time and greater mobility, the beaches and barrier islands of Pinellas County became more of a focal point for development. And over the last 50 years or so, up until the 1970s, as waterfront property was consumed, additional acreage was created by extensive dredge-and-fill operations.

As a result, both the coastal area and the barrier islands experienced intense development over the past several decades, and as the pressure and demand for waterfront property continued, the once pristine coastal areas in the County were increasingly converted to urban uses. Today, with little vacant land, redevelopment pressure is significant for waterfront property. Along the beaches, "mom and pop" motels have increasingly fallen by the wayside, replaced by new condominiums and condo-hotels. For many beach communities, redevelopment, and the conversion of tourist accommodations, is changing the character and economy of their community. And, as newer hotel and condominium uses replace older tourist accommodations, the affordability of the beaches in Pinellas County as a tourist destination is changing, thereby changing the nature of the tourists who visit.

Example of redevelopment along Pinellas County's beaches

Several communities have taken steps to address these changes, and increasingly, residents are participating in the decisions that affect the character of their coastal communities. In some cases, measures are being taken to retain the tourist economy, for example, by putting restrictions on the conversion of tourist units to residential condominiums largely occupied by part time residents.

The dramatic growth, urbanization, and change of the Pinellas County landscape, however, have not been confined to the coastal areas. Inland areas of the County, once dominated by agriculture and natural vegetation, gave way to an influx of hundreds of thousands of new residents and supporting facilities, many of them attracted by the favorable climate and coastal amenities. The result is that Pinellas has become the most densely populated and perhaps the most intensely developed county in Florida.

Multiple Jurisdictions

Despite Pinellas County's small geographic size of 280 square miles, it is split among 24 separate municipalities and a remaining unincorporated area that is ever-shrinking due to municipal annexation. The County has over 35 miles of sandy barrier island beaches, most of which are located within municipal jurisdictions. The barrier islands are divided among 13 local governments. **Table 14** shows the various local governments that have jurisdiction over all or at least a portion of a barrier island. Those islands under the jurisdiction of the Pinellas County Board of County Commissioners (southern portion of Anclote Key, Three Rooker Bar, Shell Key, and Mullet Key) are largely undeveloped (and designated as Preservation) or used as parkland. The remaining barrier islands are highly urbanized, except for Honeymoon Island and Caladesi Island State Parks within the City of Dunedin. While these beaches are some of the County's most valuable natural assets, they are also the foundation for a significant sector of the economy – tourism.

TABLE 14
PINELLAS COUNTY BARRIER ISLANDS
AND THE LOCAL GOVERNMENTS HAVING JURISDICTION

BARRIER ISLAND	LOCAL GOVERNMENT
Anclote Key	Pinellas County
Three Rooker Bar	Pinellas County
Honeymoon Island	City of Dunedin
Caladesi Island	City of Dunedin
Clearwater Beach Island	City of Clearwater
Sand Key	City of Clearwater Town of Belleair Shore City of Belleair Beach City of Indian Rocks Beach Town of Indian Shores Town of North Redington Beach Town of Redington Beach Town of Redington Shores City of Madeira Beach
Treasure Island	City of Treasure Island
Long Key	City of St. Pete Beach
Shell Key	Pinellas County
Mullet Key	Pinellas County

Source: Pinellas County Planning Department, 2007.

The non-beach shoreline of Pinellas County is also under the control of multiple jurisdictions. These lands tend to be less intensely developed than the barrier islands, mainly consisting of residential areas, parkland and open space. The primary unincorporated non-beach shoreline areas include Palm Harbor and Tierra Verde.

A Mixture of Uses

Coastal areas in Pinellas County contain a diverse array of land uses, ranging from natural open spaces to intensely developed barrier islands. Much of the tourist-oriented retail and service development, as well as the water-dependant uses, are located in the barrier island municipalities. The unincorporated County areas contain a mix of uses, including large natural areas, resource-based recreational lands, and residential uses. Commercial and industrial uses are rarely water-dependent or water-related (defined below).

For a depiction of all existing land uses within the entire County, please see the Existing Land Use Map in the *Future Land Use and Quality Communities Element* of this Comprehensive Plan.

Although single-family residential development prevails along the coastline of the unincorporated County, there are two major areas where multi-family development is a significant component of the existing land use. Portions of Planning Sector 8 (Feather Sound) and Planning Sector 12 (Tierra Verde) are designated for residential development at up to 12.5 units per acre. Other major land uses located along the unincorporated coastline are the St. Petersburg/Clearwater International Airport in Sector 8 and a Progress Energy electrical generating power plant in Sector 11. **Figure 9** depicts the Pinellas County Planning Sectors.

WATER-DEPENDENT AND WATER-RELATED USES

For the purposes of this Element and this Comprehensive Plan, water-dependent and water-related uses are defined as follows:

<u>Water-Dependent Uses</u> are activities that can be carried out *only* on, in or adjacent to water areas because the use *requires* access to water.

<u>Water-Related Uses</u> are activities not directly dependent upon access to water, but which provide goods and services that are directly associated with water-dependent or waterway uses.

Water-dependent and water-related uses, with the exception of marinas and other beach and shoreline public access (see the 'Boat Facility Siting and Resource Protection' section), found in unincorporated Pinellas County are identified in **Figure 10**.

Some of the more common types of water-dependent uses are described in **Table 15**. The unincorporated area contains examples of many of these uses; however, some are currently found only in the municipalities. An understanding of these land uses helps identify the various constituencies that use the waters, beaches, and shorelines that practically surround Pinellas County. Each constituency will have its own needs and

FIGURE 9
PINELLAS COUNTY PLANNING SECTORS

FIGURE 10
WATER-DEPENDENT AND WATER-RELATED USES IN UNINCORPORATED PINELLAS COUNTY

TABLE 15
EXAMPLES OF WATER-DEPENDENT USES

WATER DEPENDENT USE
Boat ramps and other recreation facilities
Electrical generating facilities
Fish and marine products processing plants
Fisheries and marine products
Large boat repair and maintenance facilities, commissioning yards (for large recreational and commercial watercraft)
Marinas (public, commercial, and residential)
Marine terminals (freight and passenger)
Non-boat saltwater fishing
Public beaches and public access to the beach or shoreline through public lands, private property open to the general public, or other legal means
U.S. Coast Guard and other public agency or educational docking facilities
Upland support for the above water-dependent uses. These support facilities would include parking (except for beach or shoreline access), storage and warehousing, restrooms and bathhouses, food services, etc.

SOURCE: Pinellas County Planning Department, July 1997

concerns. To adequately address the legitimate needs of each in a heavily urbanized county like Pinellas presents a challenge to local land use planners and decision-makers. Since land use along much of the County's coastline is already established, land use patterns have largely been set. An inventory of the water-dependent and water-related land uses in unincorporated Pinellas County follows.

Existing Water-Dependent and Water-Related Uses in the Unincorporated County

The economic base for most of coastal unincorporated Pinellas County is not expected to change dramatically in the 2007 to 2025 time frame. Preservation land, residences, residential-related business and parkland comprise the majority of land along the coast of unincorporated Pinellas County.

For this analysis, water-dependent and water-related uses were identified by property use/land type codes. A list of these uses by planning sector was generated, and, using a map of the County's coasts, it was determined which of these uses were located on unincorporated lands. Based upon that procedure, the following inventory (as described by sector in the following paragraphs) of existing water-dependent and water-related uses in the unincorporated County was accomplished. This procedure was followed for all of the 14 planning sectors within Pinellas County (see **Figure 9**).

<u>Sector 1</u> (Tarpon Springs area)
Much of the unincorporated area of Sector 1 lies on or near the water, including land surrounding the Anclote River. This sector has a number of water-dependent and water-related commercial ventures. The City of Tarpon Springs lies adjacent to the unincorporated County

on the north shore of the Anclote River in alternating, small enclaves. Some of these enclaves consist of only one or two parcels.

Existing water-dependent and water-related commercial uses within unincorporated Sector 1 include a commercial shrimp landing site, boat sales and repair establishments, a fish and marine products and processing plant, and industrial marina ship and boat building and repair businesses.

Sector 2 (East Lake area)
The unincorporated area of Sector 2 contains no water-dependent or water-related businesses. This area is comprised of conservation land, residences, vacant residential land, marshes, rights-of-way, railroad tracks, a few parcels of grazing and pasture land, and County property.

Sector 3 (Palm Harbor area)
Sector 3 is the only planning sector in Pinellas County that is totally unincorporated. Commercial marinas comprise the existing water-dependent and water-related uses within Sector 3.

Sector 4 (Dunedin area)
Sector 4 contains only residences and marshes in the small area of unincorporated land along the coastline. There are no water-related or water-dependent businesses in this unincorporated area. The remainder of Sector 4 falls within the City of Dunedin.

Sector 5 (Safety Harbor/Oldsmar area)
Sector 5 contains two large areas and several smaller areas of the unincorporated County on or near the water. The first large unincorporated area is located on the southern tip of a peninsula south of the City of Oldsmar. It consists largely of the Mobbly Bayou Wilderness Preserve, jointly managed by Pinellas County and the City of Oldsmar. The remainder of the area is owned by Progress Energy. The Higgins Power Plant, for many years an imposing landmark along upper Old Tampa Bay, was officially retired in 1996 and dismantled in October of 2006. Progress Energy still maintains a smaller electrical facility on the site, using it only during peak power consumption periods. It is the only economic entity on this land.

The second coastal unincorporated area in Sector 5 lies between the cities of Oldsmar and Safety Harbor at Possum Branch and the mouth of the Lake Tarpon Outfall Canal. The Seaboard Coastline Railroad tracks cross Possum Branch, but the nearby strip shopping centers have no water-dependent or water-related activity. This section also includes residences and vacant residential land.

Several small, unincorporated areas on, or near, the coast have no coastal-dependent or coastal-related businesses.

Sector 6 (Clearwater area)
The Old Tampa Bay coastline of unincorporated Sector 6 consists of residences and vacant, submerged land; no commercial land uses exist. The Gulf of Mexico and Clearwater Harbor coastlines contain no unincorporated land.

Sector 7 (Largo area)
Sector 7 contains no commercial, unincorporated land on the coast. There is a residential, unincorporated area on the Intracoastal Waterway. A few commercial ventures with no water-related activities are located along the corridors of Walsingham Road and Indian Rocks Road.

Sector 8 (High Point/Feather Sound area)
Although Sector 8, which contains a significant percentage of unincorporated lands, is expected to continue to increase its economic base with light industry, the industry is not anticipated to be dependent or related to a coastal locale. Furthermore, preservation lands and existing residential uses comprise most of the Sector 8 coastal lands. The eastern portion of Sector 8 consists of tidal swamp, marshes and submerged land, and the western coastal areas are comprised of land uses not water-related or water-dependent. Located in the middle of the coastal area are the St. Petersburg-Clearwater International Airport, U.S. Coast Guard air station and land used by the United States Military Reserve. There has been a significant amount of annexation activity in this sector during recent years, and the proportion of unincorporated lands is expected to continue to decrease.

Sector 9 (Seminole area)
Sector 9 consists of a large unincorporated area; however, most of the businesses there are not water-related or water-dependent. There are commercial marinas and an outboard repair service located in the unincorporated area within Sector 9. The remainder of the coastal land has such uses as a veteran's hospital, residences and strip shopping centers.

Sector 10 (Pinellas Park area)
Sector 10 contains no water-dependent or water-related businesses in the coastal planning area. This is due in part to there only being a very small strip of water access near Long Bayou, otherwise the sector is landlocked. There are small sections of vacant commercial and vacant industrial land which are not expected to have a significant economic impact on the sector's economic base.

Sector 11 (St. Petersburg area)
Sector 11 contains a small percentage of coastal unincorporated land. The only water-dependent entity is the Progress Energy Bartow Plant electrical generating facility located on Weedon Island. There are small areas of vacant commercial land to the west of the Gandy Bridge.

The remainder of this unincorporated area consists of residences, a dog track and kennel, a radio/television station, government preservation land, the Gandy Causeway connecting to Hillsborough County, tidal swamp and various commercial enterprises not dependent upon a coastal location.

Sector 12 (South Beaches area)
Sector 12 consists of unincorporated county land in the Tierra Verde area, and the cities of Treasure Island and St. Pete Beach. The entire unincorporated area within Sector 12 lies adjacent to or near the coastline. The unincorporated area mixes residences, general office, strip shopping centers and water-dependent/related commercial ventures. There is a marina, a yacht club, commercial boat slips and a restaurant located within the unincorporated portion of Sector 12.

Sector 13 (Mid Beaches area)
Sector 13 consists of eight beach municipalities on the island of Sand Key, stretching from Belleair Beach in the north to Madeira Beach in the south. While there are many water-dependent and water-related uses in this sector, such as tourist facilities and beach access, there is no unincorporated land in Sector 13.

Sector 14 (Kenneth City/Lealman area)
Most of Sector 14 consists of the unincorporated Lealman area. It is almost entirely landlocked, with only a small portion having access to water along Joes Creek and Cross Bayou. There are currently no uses that are considered water-dependent/related.

Estimated Need for Water-Dependent and Water-Related Land Uses

As already discussed, much of the County's shoreline is either urbanized, set aside in environmental preserves, or developed as parkland. Countywide, there is little vacant land that is suitable for development with direct access to coastal waters. As the population of the Tampa Bay area continues to grow there will be increasing demands placed on Pinellas County's coastal waters. Since some of these demands will require direct water access, an understanding of the future need for water-dependent and water-related uses can serve as a guide in determining appropriate land use designations in the coastal area. Below is a synopsis of the need for such land uses that require water access or which service such areas (topics coincide with **Table 15**).

Boat Ramps
There are currently 109 boat ramp lanes available to the public in Pinellas County, including 55 in the unincorporated County. More than half of the overall total boat ramp lanes are managed by the Pinellas County Board of County Commissioners. The number and distribution of boat ramps has remained relatively static for a number of years, with an unequal distribution favoring the southern portion of the County. Like other types of public water access, acquiring already scarce land for additional ramps is expensive and in some cases presents compatibility issues. For an in-depth analysis and more information on the future of boat ramp access in Pinellas County, please see the 'Boat Facility Siting and Resource Protection' section discussed later in this *Coastal Management Element*. Please see the *Recreation, Open Space and Culture Element* for a comprehensive listing of countywide boat ramps and their available amenities.

Electrical Generating Facilities
Progress Energy currently has three electrical generating facilities in Pinellas County: the Higgins plant, the Bartow plant, and the Bayboro plant. The main facility at the Oldsmar-area Higgins plant was decommissioned in 1996 and dismantled in October of 2006, however a four-unit 122-MW peaking plant remains at the site. The Higgins facility and the four-unit 184-MW Bayboro plant are used only during peak hours, while the 631-MW Bartow plant on

Progress Energy's Bartow Plant

Weedon Island is in use year round. Progress Energy has no plans at the present to build additional plants within Pinellas County. Consequently, no additional acreage will be needed in the County for electrical generating facilities through the Year 2025.

Fisheries and Marine Products and Processing Plants

These facilities are primarily concentrated in Tarpon Springs and the John's Pass area of Madeira Beach and Treasure Island. Additional facilities are located in Dunedin, Clearwater Harbor, Indian Rocks Beach, St. Pete Beach, and the Bayboro Harbor area of St. Petersburg. Such businesses have faced increasing pressure from the encroachment of residential and tourist-related facilities during recent years. Rising taxes also make it harder for them to earn a profit and remain competitive. Such pressures and cost considerations may increasingly lead to the decline of these industries in Pinellas County. Please see the 'Working Waterfronts Overlay/Zoning District' section of this Element for further discussion on ways to potentially preserve such uses.

Large Boat Repair and Maintenance; Commissioning Yards

Demand for the boat yard business in Pinellas County, as elsewhere, has been affected by at least two factors: 1) the improved technology involved in large boat repair has made the business more efficient, and 2) improved products have decreased the frequency of repairs. These two factors have cut into the marine boat yard business. As a result, the existing large boat repair facilities and commissioning yards are expected to be adequate for meeting demand for their services through the Year 2025. However, as with marinas and waterfront tourist accommodations, the supply of boat yard businesses in Pinellas County stands to be dramatically affected by the recent boon in waterfront land values. The threat of conversion to other uses, particularly residential, is very real. Therefore, it is important for the County to remain apprised of the boat yard situation. Please see the 'Boat Facility Siting and Resource Protection' section of this Element for further discussion.

Marinas

A countywide marina inventory conducted in 2006 revealed that there were 4,889 wet slips and 5,192 dry storage spaces in Pinellas County, not including property owner association and other private marinas not available to the general public. The supply of marina space has declined the last few years, primarily due to the surge in demand for waterfront property and higher business costs. This is an important consideration in a highly developed County with a large number of registered pleasure boats. In an attempt to help offset the losses, Pinellas County purchased its first marina property in 2006, and is pursuing other avenues toward ensuring sufficient public water access as well. For more information on the future of marina access in Pinellas County, please see the 'Boat Facility and Resource Protection' section discussed later in this Element. The *Recreation, Open Space and Culture Element* of this Comprehensive Plan provides a countywide marina inventory and graphical depiction of their locations.

Gulfport Municipal Marina

Comparisons of wet slips and water area for several marinas in Pinellas County reveal that, on average, each acre of water surface accommodates approximately 50 boats. In addition, it can reasonably be assumed that dry storage facilities will stack boats to four levels and that each boat will require about 200 square feet of space. Using these standards, dry storage requires less acreage for storage and services per boat than wet storage, and does not normally disturb adjacent water resources to the extent that wet storage potentially can. In congested Pinellas County, these attributes may lead to increased future usage of the dry storage alternative.

Marine Terminal (Port of St. Petersburg)
This facility is located within the City of St. Petersburg and is, therefore, not discussed within the County's Comprehensive Plan.

Non-Boat Saltwater Fishing (piers, catwalks, boardwalks, and jetties)
It is difficult to estimate the amount of land needed to accommodate such facilities because they can either run parallel to the shore or extend into the water. The lack of suitable vacant shoreline property that is available for public acquisition and the high cost of purchasing such property means that additional facilities for non-boat saltwater fishing most likely will occur on property already in the public domain. Please see the Public Access to the Water section of the *Recreation, Open Space and Culture Element* of this Comprehensive Plan for more information.

Public Beach Access
In Pinellas County, practically 100 percent of beachfront property is either privately owned or is currently being used for public beach access. There is little vacant beachfront property left in the County. The Pinellas County Board of County Commissioners provides several beach access parks throughout the County to accommodate public access needs. Even so, the acquisition of additional access remains a primary goal. For additional discussion, please see the 'Public Access to the Water' section of the *Recreation, Open Space and Culture Element* of this Comprehensive Plan.

Redington Shores Beach Access Park

Tourist Lodging and Services Associated with Water-Dependent Recreation
These land uses are primarily concentrated in the barrier island municipalities where there is immediate access to the Gulf beaches. Except where protected by public ownership, the barrier islands are intensively developed and have little vacant land remaining for expansion of tourist lodging. Consequently, faced with a static land base, the St. Petersburg/Clearwater Area Convention and Visitors Bureau continues to promote use of the existing facilities on a year round basis. The tremendous increase in waterfront property value over the last few years has placed redevelopment pressure on many of the tourist lodging and service facilities within Pinellas County, particularly older 'mom and pop' establishments. Many such properties have been redeveloped into multi-family residential facilities or, on a few occasions, more upscale resort type hotels. The result is a combination of fewer overall available tourist accommodation units and an increased number of more expensive resort-style units. As a significant portion of

the County's economy is dependent on tourism, this is an important trend that warrants close monitoring.

U.S. Coast Guard and Other Public Agency or Educational Docking Facilities
The only U.S. Coast Guard station in unincorporated Pinellas County, which is located adjacent to the St. Petersburg-Clearwater International Airport in Sector 8, is strictly an air station and has no water-dependent or water-related uses.

Parameters for Increasing Public Access for Water-Dependent Recreation

As mentioned earlier, there are few suitable vacant parcels remaining for public acquisition for beach access. More options are available for shoreline access, however, because potential sites are not as limited. For beach access, therefore, the main siting criteria is availability of land. Beyond that, the following criteria would apply to both beach and shoreline access sites:

- Adequate access to roadways with the capacity to accommodate the projected number of visitors.
- The intended use would be compatible with the surrounding land uses.
- The site should have adequate provisions for providing sewer and potable water.
- Sites that would support multiple objectives should be preferred. These various objectives may include environmental protection and hazard mitigation, in addition to public access.

COASTAL ECONOMIC BASE

A large portion of the Pinellas County economy is based upon visitors to the County and the goods and services they purchase. The economic conditions of specific regions of the United States, coupled with the Canadian, European and other foreign economies, impact the economic outlook for visitor-related industries. Significant world events also play a crucial role, as do weather phenomena such as hurricanes.

This situation is characterized by the list of figures in the *Percentage Change* column of **Table 16**. With the exception of 2002, there was a positive change in the number of annual visitors to Pinellas County throughout the given timeline. The 2002 anomaly was likely a result of the aftermath from the events of September 11, 2001 and the bursting of the stock market bubble. The subsequent economic decline led to a reduction in tourism. Before that, the relatively high annual percentage increase from year to year reflected the booming world economy. Since 2002, the number of visitors to Pinellas County has once again increased annually, as the economy has enjoyed a renewed period of sustained growth. The slowdown in growth since 2004 is likely attributable to concerns over increased hurricane activity. Despite the weather, an overall feeling that world economies, particularly those of North American and European nations, are doing well is almost certainly a contribution factor in the steady growth of the number of visitors to Pinellas County. The weak dollar and favorable exchange rates are further positives for foreign visitors.

TABLE 16
VISITORS TO PINELLAS COUNTY

YEAR	NUMBER OF VISITORS	PERCENTAGE CHANGE[1]
1998	4,398,437	-
1999	4,542,111	3.3
2000	4,700,140	3.5
2001	4,726,161	0.6
2002	4,714,432	(0.2)
2003	4,837,998	2.6
2004	5,077,280	4.9
2005	5,212,435	2.7
2006[2]	4,836,955	0.7

SOURCE: Tourist Development Council, Pinellas County, unpublished data.
St. Petersburg and Clearwater Area Convention and Visitors Bureau, unpublished data, 2006
[1] Percentage change depicts the annual percentage increase or decrease "( )"
[2] Through November.

Tourism-Related Industries

The tourism-related industries (lodging, restaurants and specialty retail) contributed over $2.1 billion in gross sales and over $120 million in taxes to Pinellas County in 2005 (see **Table 17**). Gross sales and tax collections for the lodging industry increased 26.2 percent and 20.9 percent, respectively, from 1998 to 2005. For this same time frame, restaurants increased gross sales by 29.8 percent and tax collections by 29.7 percent. Specialty retail increased gross sales by 1.8 percent, while tax collections decreased by 8.3 percent. Except for minor fluctuations, gross sales and tax collections have shown a steady growth trend during the 2000s, contributing to the Pinellas County economy.

John's Pass Village & Boardwalk, a popular tourist destination in Madeira Beach

TABLE 17
TOURIST RELATED INDUSTRIES IN PINELLAS COUNTY
(in millions of dollars)

YEAR	LODGING[1]		RESTAURANTS[2]		SPECIALIST RETAIL[3]	
	Gross Sales	Tax Collections[4]	Gross Sales	Tax Collections[4]	Gross Sales	Tax Collections[4]
1998	448.4	26.3	1,073.5	62.9	175.5	7.8
1999	499.0	26.5	1,158.6	61.2	173.1	8.0
2000	522.7	29.9	1,180.4	67.8	194.2	7.8
2001	522.6	29.6	1,209.6	69.8	194.6	7.8
2002	474.8	21.4	1,332.1	70.3	182.1	7.5
2003	501.4	28.2	1,240.0	70.6	179.4	7.9
2004	524.3	30.3	1,319.7	76.3	180.6	7.3
2005	565.9	31.8	1,393.2	81.6	178.7	7.2

SOURCE: Florida Department of Revenue, Office of Tax Research, County by Kind Report, 1998-2005

[1] Kind codes 39, sic codes 6513, 6514, 6515, 7011, 7021, 7032, 7033, 7041; includes hotels, motels, tourist courts, sporting and recreation camps, trailer parks for transients, membership basis organization hotels, mobile home site operators, apartment building operators, dwelling operators (except apartments), rooming and boarding houses

[2] Kind code 08, sic code 5812; includes restaurants, lunchrooms and catering services

[3] Kind code 55, sic codes 5943, 5945, 5947; includes the following stores: gift, souvenir, card, novelty, hobby, craft, stationery, toy, game and taxidermy

[4] Tax collections include sales and use taxes

Park Facilities

The attendance at Pinellas County parks increased 13.9 percent between fiscal years 1998-99 and 2005-06, a span of time in which Boca Ciega Millennium Park and Wall Springs Park were opened to the public (see **Table 18**). Fort DeSoto Park, named America's Number One Beach in 2005, is particularly popular.

State park attendance fluctuated during the same time period, although an overall positive trend is clearly evident (see **Table 19**). Following a significant decline in 2004, FY 2005-06 enjoyed the highest attendance numbers of the time frame. The fluctuation may be the result of above average hurricane activity and subsequent beach erosion. The popularity of County park facilities, which are free-of-charge, likely draws potential visitors away from the State parks as well. Notably, attendance at Caladesi Island State Park, named America's #2 Beach in 2006 and 2007, has steadily risen to its highest points the past couple of years, despite being accessible only by boat.

TABLE 18
ATTENDANCE AT COUNTY PARKS IN PINELLAS COUNTY

FISCAL YEAR[3]	TOTAL COUNTY[1]	PERCENTAGE CHANGE[2]
1998-1999	15,677,697	-
1999-2000	16,056,722	2.4
2000-2001	16,048,261	(0.1)
2001-2002	16,360,440	1.9
2002-2003	16,453,420	0.6
2003-2004	17,232,799	4.7
2004-2005	17,302,040	0.4
2005-2006	17,852,361	3.2

SOURCE: Pinellas County Parks Department, 2007
[1] The attendance for all county developed parks open to the public
[2] Percentage change depicts the annual percentage increase or decrease "( )"
[3] Fiscal year from October 1 to September 30

TABLE 19
ATTENDANCE AT STATE PARKS IN PINELLAS COUNTY

FISCAL YEAR[1]	CALADESI ISLAND	HONEYMOON ISLAND	SKYWAY STATE FISHING PIERS[2]	ANCLOTE KEY[3]	TOTALS
1997-1998	134,296	498,697	179,807	176,801	989,601
1998-1999	143,187	646,460	213,710	189,505	1,192,862
1999-2000	147,105	728,393	212,807	279,821	1,368,126
2000-2001	153,855	851,714	245,935	285,986	1,537,490
2001-2002	154,449	890,278	244,984	229,222	1,581,933
2002-2003	145,018	857,921	257,091	177,994	1,438,024
2003-2004	132,910	721,893	263,621	79,017	1,197,441
2004-2005	226,900	869,458	242,471	110,393	1,449,222
2005-2006	250,549	953,824	235,623	151,377	1,591,373

SOURCE: University of Florida, Bureau of Economic and Business Research, Florida Statistical Abstract, 1999-2006
[1] fiscal year is from July 1 to June 30
[2] Partially located in Pinellas County; shared with Hillsborough County
[3] Partially located in Pinellas County; shared with Pasco County

Fish and Shellfish Landings

Finfish, shrimp and invertebrate landings for both the State of Florida and Pinellas County between 1997 and 2005 are depicted in **Table 20**. Total value amounts for Pinellas County were not available. Both the overall State and Pinellas County landings fluctuated throughout the time period. County landings as a percentage of statewide totals remained relatively stable. While concern over the potential conversion of the County's fishery infrastructure into other uses due to high demand for waterfront property remains real and legitimate, these statistics help affirm the continuing viability of the industry. **Table 20** also reveals a gradual decline of the total value of fishery landings. This appears to be a statewide issue that, if necessary, would best be addressed at the State level.

TABLE 20
FISH AND SHELLFISH LANDINGS

YEAR	FLORIDA				PINELLAS COUNTY					
	LANDINGS (1,000,000,000 lbs)			Total Value (million)	LANDINGS[1] (1,000,000,000 lbs)			Percentage of Florida Landings (%)		
	Finfish	Shrimp	Invertebrate	$	Finfish	Shrimp	Invertebrate	Finfish	Shrimp	Invertebrate
1997	58.33	25.47	31.57	204.33	7.89	2.07	0.88	13.5	8.1	2.8
1998	56.72	32.72	33.33	201.85	7.81	3.40	0.87	13.8	6.0	2.6
1999	60.14	23.62	35.32	212.28	10.20	1.23	0.66	16.7	2.1	1.9
2000	53.53	25.09	25.41	208.70	9.88	1.23	0.66	18.5	4.9	2.6
2001	57.57	24.92	19.33	183.58	11.28	1.28	0.52	19.6	5.1	2.7
2002	56.01	20.20	19.22	171.87	10.01	1.65	0.64	17.9	8.2	3.3
2003	54.64	21.91	20.40	170.00	10.15	1.65	0.73	18.6	7.5	3.6
2004	53.67	28.25	26.93	186.17	10.03	1.73	0.88	18.7	6.1	3.3
2005	49.56	18.95	20.30	165.90	8.28	1.16	0.77	16.7	6.1	3.8

SOURCE: Florida Dept of Environmental Protection, Fish and Wildlife Research Institute, Annual Landings Summary, 1997-2005
[1] County of landing is the county where the seafood products crossed the shore

The Marine Industry

The marine industries in Pinellas County – motorboats, commercial fishermen and seafood dealers – added to the County's economy in 2005 with over $480 million in gross sales and over $14 million in tax collections (see **Table 21**). Gross sales and tax collections for the motorboat industry increased 51.5 percent and 26.1 percent, respectively, from 1997 to 2005. The Seafood dealers, however, saw a decrease in gross sales by 320 percent (from $8 million to $2.5 million) and tax collections by 33.2 percent from 1997 to 2005. There was major fluctuation in the gross sales generated by commercial fishermen between 1998 and 2005, however tax collections remained much more stable. The large fluctuations raise questions regarding the accuracy of the data. If accurate, however, it appears that the contributions by commercial fisherman to the Pinellas County economy are once again on the rise. Although seafood dealers and commercial fisherman show fluctuations and/or downturns in recent years, both industries are expected to continue to contribute to the Pinellas County economy.

TABLE 21
MARINE INDUSTRY IN PINELLAS COUNTY

YEAR	Motorboats[1] (1,000,000s)		Commercial Fisherman[2] (1,000s)		Seafood Dealers[3]	
	Gross Sales	Tax Collections[4]	Gross Sales	Tax Collections[4]	Gross Sales ($1,000,000s)	Tax Collections[4] ($1,000s)
1998	315.3	11.1	15.7	0.9	8.0	27.7
1999	341.7	12.5	745.4	0.4	8.3	29.3
2000	379.0	13.1	2,536.6	1.6	6.0	34.2
2001	359.3	11.5	1,089.4	2.3	2.1	21.1
2002	382.2	12.8	1,456.4	1.6	2.1	21.4
2003	398.2	13.1	427.9	0.5	2.1	20.0
2004	466.8	14.4	374.1	0.3	2.2	19.5
2005	477.8	14.0	557.4	0.6	2.5	20.8

SOURCE: Florida Department of Revenue, Office of Tax Research, County by Kind Report, 1998-2005
[1] Kind code 28, sic code 5551; includes motorboats, yachts, marine parts and accessories
[2] Kind code 98, sic 0910
[3] Kind code 03, sic code 5423
[4] Tax collections includes sales and use taxes

The number of registered commercial boats has declined annually throughout the FY 1997-98 to FY 2005-06 time period for both Florida and Pinellas County (see **Table 22**). In the last nine years, the statewide total decreased by 36 percent and the Pinellas County total decreased by 44 percent. The Pinellas County registered commercial vessels were 5.4 percent of total Florida registrations for FY 2005-06, a slight increase from the FY 2004-05 percentage of 5.2 percent. The number of Pinellas County commercial vessels as a percentage of the statewide total has remained relatively stable throughout the time period. The gradual decline of commercial boat registrations seems to be a statewide issue. Whether this points to an overall downturn in the industry, or simply an increase in efficiency (fewer boats doing more work) remains to be seen.

The number of registered pleasure boats has generally increased for both Florida and Pinellas County in the last several years, with an increase of 21.9 percent and 6.5 percent, respectively, between FY1997-98 and FY2005-06 (see **Table 23**). The smaller increase for Pinellas County is due to its near built-out status. Pinellas County is perennially among the top two Florida counties (along with Miami-Dade) in terms of the overall number of pleasure boat registrations. Although the annual percentage changes fluctuate sporadically, Pinellas County consistently shows between 5.5 percent and 6.2 percent of Florida's registered pleasure boats. This percentage is expected to decrease as other areas of Florida continue to develop. See the 'Boat Facility Siting and Resource Protection' section of this Element for more information on Pinellas County boating characteristics and issues.

TABLE 22
COMMERCIAL BOATS

Fiscal Year[2]	FLORIDA		PINELLAS COUNTY		
	Number Registered	Percentage Change[1]	Number Registered	Percentage Change[1]	Percentage of Florida
1997-1998	33,680	-	2,063	-	6.1
1998-1999	32,554	(3.3)	1,993	(3.4)	6.1
1999-2000	27,897	(14.3)	1,376	(31.0)	4.9
2000-2001	24,321	(12.8)	1,279	(7.1)	5.3
2001-2002	23,966	(1.5)	1,231	(3.8)	5.2
2002-2003	23,873	(0.4)	1,246	1.2	5.2
2003-2004	23,231	(2.7)	1,227	(1.5)	5.3
2004-2005	20,758	(10.6)	1,089	(11.2)	5.2
2005-2006	21,582	4.0	1,164	6.9	5.4

SOURCE: Florida Department of Highway Safety and Motor Vehicles, Revenue Reports Fiscal Years 2000-2001 to 2005-2006
[1] Percentage change depicts the annual percentage increase or decrease "( )"
[2] Fiscal year is from July 1 to June 30

TABLE 23
PLEASURE BOATS

Fiscal Year[2]	FLORIDA		PINELLAS COUNTY		
	Number Registered	Percentage Change[1]	Number Registered	Percentage Change[1]	Percentage of Florida
1997-1998	769,527	-	48,269	-	6.2
1998-1999	791,410	2.8	50,030	3.6	6.3
1999-2000	840,684	6.2	50,366	0.7	6.0
2000-2001	839,679	(0.1)	49,895	(0.9)	5.9
2001-2002	877,764	4.5	52,991	6.2	6.0
2002-2003	891,741	1.6	52,314	(1.3)	5.9
2003-2004	920,907	3.3	52,535	0.4	5.7
2004-2005	849,947	(7.7)	47,446	(9.7)	5.6
2005-2006	938,144	10.4	51,423	8.4	5.5

SOURCE: Florida Department of Highway Safety and Motor Vehicles, Revenue Reports Fiscal Years 2000-2001 to 2005-2006
[1] Percentage change depicts the annual percentage increase or decrease "( )"
[2] Fiscal year is from July 1 to June 30

In conclusion, the overall economic outlook for coastal-related industries appears to remain strong. However, it is important for the County to remain apprised of economic and market trends that stand to affect water-dependent and water-related land uses.

SHORELINE LAND USE CONFLICTS AND REDEVELOPMENT NEEDS

The shoreline of Pinellas County is exemplified by a diversity of land uses which, in certain situations, creates opportunities for conflict between different uses. Land use conflicts can take various forms that may include one or more of the following:

- Degradation of the natural environment
- Adverse impact on the economic base of the coastal area
- Disruption of established land use patterns
- Adverse impact on existing infrastructure

As already discussed, the predominant land use activities in unincorporated coastal Pinellas County are single-family residential development, as well as parkland and areas that are environmentally sensitive and precluded from development either because of State and/or local environmental regulations or because the property has been acquired by the public. Such areas include the Gateway tract of the Weedon Island Preserve on the western end of the Howard Frankland Bridge, portions of southeast Oldsmar along the Pinellas/Hillsborough County line, and wetlands along the Anclote River in the Tarpon Springs area.

Over the years, it has been acknowledged that for some areas of the County, particularly along the coastline, the highest and best use for a parcel of land is to maintain it in its natural condition (e.g., mangroves, saltwater marsh, or dunes). As development attempts to expand onto more marginal coastal properties, the further destruction of natural coastal resources is a possibility. The natural resources of the coastal area are beneficial in numerous ways. They provide protection from the effects of hurricanes and other coastal storm events, help define community character, provide respite from the clamor of the surrounding urban environment, and contribute immeasurably to the County's economic well being. The public's perception of the role and importance of the natural system, and an understanding of how development can occur without harming these resources will be two important steps in ensuring that further growth and preservation of our natural heritage can occur harmoniously. Such harmony is paramount toward sustaining a high quality of life for residents and visitors, and maintaining livable communities throughout Pinellas County.

Marinas and large boat repair facilities constitute another category of non-residential shoreline uses in Pinellas County. Marinas are of several types. Some are associated with a condominium project and are, therefore, located in a residential area. Other marinas, however, are open to the general public and are under private or public ownership. Such facilities may not be as acceptable to most neighborhoods due to compatibility issues, traffic and noise concerns. As a result, they are generally excluded from residential areas. Some of these marinas are located in commercial nodes where there is little or no conflict with nearby residential uses. Such areas, however, are often considered ideal locations for condominium development. Because of the greater return on investment, the conversion of marinas to condominiums has been occurring throughout Florida, and is a proven source of marina loss in Pinellas County. Marina slip losses in Pinellas County are difficult to recoup because there are few available sites for additional marina development that are not precluded by environmental constraints and/or potential neighborhood opposition. Please see the 'Boat Facility Siting and

Resource Protection' section on the following pages for addition information on marina losses and the County's strategy to ensure continued adequate shoreline access for boaters.

Large boat repair and maintenance facilities are sometimes associated with a marina or may be a separate boat yard. This type of land use is more intensive than a marina use and is more appropriately considered an industrial or heavy commercial use. These facilities are generally incompatible with residential development and are normally located in marine commercial/industrial nodes such as the municipal and unincorporated areas along the Anclote River in Tarpon Springs, John's Pass, and the Salt Creek area in St. Petersburg.

The shoreline uses servicing the commercial fishing business are also generally concentrated in the marine commercial/industrial nodes. These operations, which include docking facilities and seafood processing plants, are also dependent upon shoreline access that is not adjacent to substantial areas of residential development. The berthing of commercial fishing boats in residential areas when they are not in use has been prohibited in one barrier island community and has been considered in at least one other.

Public beach access sometimes creates a conflict in residential neighborhoods. In some beach communities for instance, public access lacks parking facilities or requires a special permit that may be available to local residents only. As a result, the general public's access to the beach is hindered. Adequate design of public access facilities and proper behavior by the public should reduce or eliminate any conflicts with adjacent residences.

Waterfront neighborhoods such as this might conflict with any nearby marine industry facilities