

# Monroe County Marine Management Strategic Plan

## Appendix 2

### Working Waterfronts Report

December 2005

Prepared by:  
South Florida Regional Planning Council  
with  
Center for Urban and Environmental Solutions at Florida Atlantic University





## TABLE OF CONTENTS

<b>Introduction .....</b>	<b>1</b>
<b>Section 1: Study Area Description of the Upper, Middle, and Lower Keys .....</b>	<b>3</b>
Introduction .....	3
The Upper Keys.....	4
The Middle Keys .....	5
The Lower Keys.....	5
<b>Section 2. History, Culture and Importance of the Working Waterfront .....</b>	<b>7</b>
Introduction .....	7
Early History (1912-1975): Emergence of the Fishing Industry .....	8
Late History (1975-2004): The Dominance of Tourism.....	12
<b>Section 3: The Working Waterfront Today.....</b>	<b>23</b>
Introduction .....	23
Studies, Reports and Plans .....	24
Conclusion .....	28
<b>Section 4: Analysis of Key Stakeholder Interviews.....</b>	<b>29</b>
Introduction .....	29
Historical Impact of the Working Waterfront.....	29
Change in the Working Waterfront Over Time.....	30
Major Industries in The Florida Keys .....	34
Key Problems Confronting the Marine Industries.....	37
Forecast and Vision.....	39
Scenarios.....	41
Recommendations and Key Action Items .....	43
<b>Section 5: Similar Challenges Facing Other Waterfront Communities .....</b>	<b>46</b>
Senate Report and the New Legislation .....	46
Extent of Losses Statewide.....	46
Florida Counties with Common Needs.....	47
Waterfront Preservation in Other States.....	50



# Introduction

The Monroe County Board of County Commissioners (BOCC) acknowledged the urgent need to address the loss of both commercial and recreational “working waterfronts” in the Florida Keys following public meetings in the summer of 2004. The BOCC then directed the County’s Marine Resources Department (Department) to prepare a countywide public water access and marine management plan.

Monroe County is experiencing the loss and redevelopment of waterfront marine facilities and their associated businesses and employment. A limited supply of waterfront land and an increasing demand for different uses are driving the apparent change in waterfront properties. One challenge is the loss of “working waterfront,” which includes commercial marinas, boatyards, wet and dry storage, fish houses, commercial-fishing dockage, and marine-related industries, such as boat dealers, boat repair and maintenance services, commercial and recreational fishing operations, and tourism. The ongoing trend is a transition to non-water-dependent uses (e.g., condominiums) and exclusive use (e.g., private marinas). Related to the redevelopment issue is concern for public water access and the loss of boat ramps and dockage currently offered by boat yards and marinas.

Responding to the growing perception that public water access is shrinking, not only in Monroe County, but also in many other parts of the state, the Committee on Community Affairs of the Florida Senate compiled a *Working Waterfronts* report, which was released in November 2004.<sup>1</sup> This study posited that public access to boat ramps and marinas may be diminishing due to increases in statewide vessel registrations and conversions of recreational and commercial-fishing working waterfronts from public to private use. Committee recommendations led to the passage of the Florida Waterway and Waterfront Improvement Act of 2005.<sup>2</sup> One requirement of the new law applicable

---

<sup>1</sup> *Working Waterfronts*. Florida Senate Committee on Community Affairs. Interim Summary Report 2005-122 (2004).

<sup>2</sup> <sup>2</sup> Florida Waterway and Waterfront Improvement Act. Fla. Stat. §§ 342.03 *et seq.* (2005). Section 342.07(1) of the Waterway and Waterfront Improvement Act provides:

The Legislature recognizes that there is an important state interest in facilitating boating access to the state’s navigable waters. This access is vital to recreational users and the marine industry in the state, to maintaining and enhancing the \$14 billion economic impact of boating in the state, and to ensuring continued access to all residents and visitors to the navigable waters of the state. The Legislature recognizes that there is an important state interest in maintaining viable water-dependent support facilities, such as boat hauling and repairing and commercial fishing facilities, and in maintaining the availability of public access to the navigable waters of the state. The Legislature further recognizes that the waterways of the state are important for engaging in commerce and the transportation of goods and people upon such waterways and that such commerce and transportation is not feasible unless there is access to and from the navigable waters of the state through recreational and working waterfronts.

Section 342.07(2) follows with:

[T]he term “recreational and commercial working waterfront” means a parcel or parcels of real property that provide access for water-dependent commercial activities or provide access for the public to the navigable waters of the

to Monroe County, a waterfront community, is for the Future Land Use Element of the County's Comprehensive Plan to set forth regulatory incentives and criteria that encourage the preservation of commercial and recreational working waterfronts, including public access.<sup>3</sup>

To this end, it should be noted that Monroe County's Comprehensive Plan already requires a Shoreline Use Priorities Plan that sets forth criteria for the siting of water-dependent and water-related uses, such as marinas.<sup>4</sup> The County has in place a number of land use zones specifically designated for commercial fishing, such as the commercial fishing village, commercial fishing special district, maritime industries district, among others.<sup>5</sup>

To aid in the development of a public access and marina siting plan and to assist the County in meeting the requirements of the new law, this report supports the preparation of the overall Monroe County Marine Management Strategic Plan. This report consists of the following sections:

1. Study Area Description of the Upper, Middle, and Lower Keys (with maps)
2. History, Culture, and Importance of the Working Waterfront
3. The Working Waterfront Today
4. Analysis of Key Stakeholder Interviews
5. Similar Challenges Facing Other Waterfront Communities

---

state. Recreational and commercial working waterfronts require direct access to or a location on, over, or adjacent to a navigable body of water. The term includes water-dependent facilities that are open to the public and offer public access by vessels to the waters of the state or that are support facilities for recreational, commercial, research, or governmental vessels. These facilities include docks, wharfs, lifts, wet and dry marinas, boat ramps, boat hauling and repair facilities, commercial fishing facilities, boat construction facilities, and other support structures over the water.

<sup>3</sup> Fla. Stat. § 163.3177(6)(a), as amended by the Waterway and Waterfront Improvement Act of 2005.

<sup>4</sup> Objective 212.4 *et seq.*, Conservation and Coastal Management Element, Monroe County Comprehensive Plan (1993).

<sup>5</sup> Sections 9.32.170- 9.32.190, Ch. 9.32 Land Use Districts, Monroe, FL, County Code. See also, Policy 101.4.6-101.4.7, Future Land Use Element, Monroe County Comprehensive Plan (1993).

## **Section 1: Study Area Description of the Upper, Middle, and Lower Keys**

### ***Introduction***

Monroe County consists of a 120-mile-long archipelago known as the Florida Keys, which is frequently separated into upper, middle and lower divisions (see maps). The low-lying islands of the Keys extend from the southeastern tip of the Florida peninsula to the Dry Tortugas and lie between the Gulf of Mexico and the Atlantic Ocean. They are separated from the mainland by Biscayne Bay, Barnes Sound, Blackwater Sound, and Florida Bay.

The study area for this plan is Monroe County and its coastal communities within the upper, middle, and lower Keys, from mile marker 126 thru 0 on U.S. 1 and portions of County Road 905 in Key Largo.<sup>6</sup> The County population of 79,589 in 2000 was spread across only 30 of the 822 islands of the Keys connected by 19 miles of bridges.<sup>7</sup> The majority of the population is non-hispanic white (77.2 percent) or Hispanic (15.8 percent), with non-Hispanic black (4.5 percent) and other (2.5 percent) representing a smaller portion of the community. The median age of Monroe County residents in 2000 was 42.6 years. The County's average household size was 2.2, with a per capita income of \$26,102.<sup>8</sup>

It is believed that the Keys evolved from the eroded foothills of the ancient Appalachian mountains into surfaces made up of limestone and fossilized reefs. Over many centuries, a unique system of plants and animals has evolved on the islands and adapted to the warm, subtropical environment of the Keys. Public lands have now been acquired to preserve over 100 endangered and threatened species of the islands such as Marsh Rabbit, Key Deer, and the American Crocodile. In fact, more than 60 percent of the land mass in the Keys is in government ownership. Development pressure on the Keys has also prompted lawmakers to designate the area as a place of "critical concern."

The islands basking in the sun between the turquoise-blue waters feature sensitive coral reefs just off the shoreline. The waters are highly productive marine nurseries, resulting in a world-wide diving, fishing, boating destination for the Keys. The millions of tourists that visit this "paradise" provide a major source of employment for local residents. Another appealing element of the Keys is a relaxed lifestyle exhibited by residents and an eclectic mix of artists, writers, musicians, and others who truly

---

<sup>6</sup> Mile markers are often used as referencing points to provide direction for residents and tourists of Monroe County.

<sup>7</sup> The demographic descriptions of the Keys are based on data from the 2000 Census and calculated by grouping study areas together based on zip codes.

<sup>8</sup> Demographic information is based on the 2000 Census. Retrieved June 17, 2005 from <http://factfinder.census.gov>

contribute to the unique cultural milieu. The rich history of the Keys also attracts a fair share of visitors to museums, historical centers, and the town of Key West.

## ***The Upper Keys***

The Upper Keys region includes the island areas from Florida City south to Channel 2.<sup>9</sup> In 2000, this area had a total population of 22,013 residents and 16,978 housing units. About one-third (5,795) of the housing is seasonal, recreational, or occasional use. The Upper Keys are known for numerous restaurants, businesses, beaches, and other natural amenities that provide convenience for residents and fascination for visitors.

The largest of all the islands of the Keys is Key Largo, located south of Florida City and ending at Angelfish Key in the Atlantic Ocean.<sup>10</sup> Key Largo boasts a population of 12,971 residents and covers 5,186 acres of land. The area is known as the “diving capital of the world” and features two of the most beautiful underwater attractions: John Pennekamp Coral Reef State Park and Key Largo National Marine Sanctuary. Key Largo has a total of 9,694 housing units, 31.2 percent of which are intended for seasonal, recreational, or occasional use. More than 70 percent of the 5,853 housing units are owner-occupied.

Continuing south on U.S. 1, the community of Tavernier<sup>11</sup> is a place known to be rich in history and character. It has a population of 3,852 residents.<sup>12</sup> This town was one of the earliest settled regions in the Keys and was used as a launching point for the wrecking industry (salvaging of goods from ship wrecks) prevalent in the 1800s. Tavernier also had a thriving farming industry before the major hurricane of 1935 destroyed the main farming export routes. Today, the community is comprised of a mix of single family and mobile homes, condominiums, small marine-related businesses, and other light industrial uses.

One of the most popular Keys in the Upper Keys region is Islamorada.<sup>13</sup> It is often referred to as the “sportfishing capital of the world” and attracts tourists worldwide to compete in its many fishing tournaments. An interesting site on Islamorada is Lignumvitae State Botanical Park, the highest point of the Keys at 18 feet above sea level. The population of Islamorada is 3,485 but this varies considerably, depending on seasonal visitors, as in the rest of the Keys.

---

<sup>9</sup> Northeast of mile marker 72 on US 1 and the islands connected by County Road 905.

<sup>10</sup> U.S. mile marker 97 to 107 and extending onto County Road 905.

<sup>11</sup> It is located between mile marker 91 and 97.

<sup>12</sup> Livable CommuniKeys Master Plan – Tavernier Creek, Monroe County Government.

<sup>13</sup> Located roughly between mile markers 80 and 85 on U.S. 1.



## ***The Middle Keys***

The Middle Keys region<sup>14</sup> runs from Channel 2 to the 7-mile bridge and is often referred to as the “heart of the Keys.” It contains an abundance of activities for year-round residents and tourists alike, such as beaches, cinemas, water activities, restaurants, bars, and businesses. The population in this region was 12,030, with most people residing in Marathon. There were 9,681 housing units in the Middle Keys, and 5,506 of these units were owner-occupied.<sup>15</sup>

The less developed portion of the Middle Keys is Long Key,<sup>16</sup> with a population of only 544 residents. At the time of the 2000 Census, 252 of the 767 housing units were occupied, with nearly 80 percent of them being owner-occupied. A large portion of Long Key is dedicated as a state park, which has become a favorite for campers and nature-seekers. There is an abundance of wildlife onshore and offshore that can be experienced by canoe or nature trails when visiting Long Key State Park.

The City of Marathon<sup>17</sup> has evolved from a small fishing village into a town incorporated in 1999, with its own airport, business clusters, and visitor attractions. It also has many of the common natural habitats of the Keys, such as seagrasses, mangroves, wetlands, and hardwood hammocks. The dredge and fill activities of the 1950s and 1960s were significant in altering the landscape of this area, allowing for greater residential and commercial development. The City had a population of 10,255 residents, with almost 65 percent of them owning houses in Marathon.

## ***The Lower Keys***

The Lower Keys region extends from mile marker 0 in Key West to mile marker 41, just past Little Duck Key on the 7-mile bridge. This area features something for everyone with the obvious focus on water activities, nature tours, historical centers, and vibrant nightlife. The Lower Keys region<sup>18</sup> had a population of 45,486 in 2000, with more than 75 percent of residents in the City of Key West. There were a total of 24,913 housing units in this region, and 19,589 or 78 percent of them were owner-occupied. It should be noted that the population of the Keys can increase by as much as 35 percent in the winter months and during certain festivities.<sup>19</sup>

---

<sup>14</sup> Begins at mile marker 42 and ends at Craig Key or just before mile marker 73.

<sup>15</sup> The zip codes that are considered to be part of the middle Keys are 33001, 33050, and 30051.

<sup>16</sup> This area stretches from mile marker 65 to mile marker 72 at Craig Key.

<sup>17</sup> Between mile marker 47 and 60.

<sup>18</sup> Contains the zip codes 33040, 33042, and 33043.

<sup>19</sup> Percentage increase was calculated by dividing the housing units for seasonal, recreational, or occasional use by occupied housing units for Monroe County using the 2000 Census.

The northernmost portion of the Lower Keys contains Big Pine Key, No Name Key, Spanish Harbor Keys, Bahia Honda, and Money Key. This area is connected by U.S. 1 mile markers 30 thru 41 and has a population of 5,159. There are 2,320 occupied housing units spanning these islands, with more than 75 percent of them owner-occupied units. It is also notable that habitat conservation is especially important in this region due to the large population of Marsh Rabbit and Florida Key Deer that are found here.

The Keys stretching from Lower Sugarloaf Key (mile marker 16) to Little Torch Key (mile marker 29) has a total population of 6,097. There are 2,742 occupied housing units, with over 80 percent of them being owner-occupied units. The area has a mix of residential, commercial, and vacation-style resorts. This group of islands makes up some of the least developed areas in the Keys and is also known for its unique native wildlife. Berky Bat Tower and Looe Key National Marine Sanctuary are notable landmarks in this area.

Stock Island, located to the north of Key West at about mile marker 5, is the southernmost portion of unincorporated Monroe County. The island is home to an important community of workers and businesses that serve the local economy. More recently, the area has been facing increased pressure to redevelop many of its waterfront industries into upscale residential communities. Of great significance is the fact that this island contains the only industrial, deepwater port remaining in the lower Keys.

In its early history, Key West was the richest city in the nation, but then became one of the poorest nearly a century later. Today, Key West has a bustling tourist economy that attracts visitors with its fascinating history, arts, retail shops, and nightlife. Key West also features a U.S. Naval Air Station and reserve, an international airport, and a historic seaport district. At one time, the commercial fishing industry was its main economic industry, but today tourism is the main focus of the Key West economy.

## **Section 2. History, Culture and Importance of the Working Waterfront**

### ***Introduction***

For purposes of this report, the history of the Florida Keys may be divided into two time periods – 1912-1975 and 1975-2004. In understanding the working waterfront,<sup>20</sup> a particular focus of this study has been to outline the events that highlight the continued presence of the working waterfront as it provides a glimpse into the unique history and culture of the Keys. An attempt was also made to establish a context that can be used to evaluate current issues and challenges facing today's residents of Monroe County. While the earliest time period used for this report begins with the completion of Henry Flagler's railroad and his ensuing trip to Key West on the *Rambler*, it should be noted that the importance of the fishing industry was already well established by this time.<sup>21</sup>

The progression from this point in time simply represents an accelerated pace of change for the Florida Keys, brought about by easier physical access to the region and improved commercialization of its resources. This early history of the Keys (1912-1975) highlights the major events that contribute to framing an understanding of how the Keys have evolved over time and provides useful insights into how the major economic industries of that time period functioned and prospered during changing economic conditions. This section concludes with the transition to tourism in the Keys, as the Keys became a leading destination point for vacationers and tourists.

The later history of the Keys (1975-2004) contains greater detail on the progression of events and changes experienced in the region between these two time periods, extending any patterns or trends described in the earlier section. It should be noted that the designation of Monroe County as an Area of Critical State Concern by the State of Florida is the launching point of discussion for this section. This event would change the pace and location of any new growth experienced in the Keys.

---

<sup>20</sup>A recreational and commercial working waterfront has been defined as “a parcel or parcels of real property that provide access for water-dependent commercial activities or provide access for the public to the navigable waters of the state. Recreational and commercial working waterfronts require direct access to or a location on, over, or adjacent to a navigable body of water. The term includes water-dependent facilities that are open to the public and offer public access by vessels to the waters of the state or that are support facilities for recreational, commercial, research, or governmental vessels. These facilities include docks, wharfs, lifts, wet and dry marinas, boat ramps, boat hauling and repair facilities, commercial fishing facilities, boat construction facilities, and other support structures over the water.” Waterway and Waterfront Improvement Act, Florida Statute Sec. 342.07 (2005).

<sup>21</sup> Little, Edward J. (2000). An overview of the evolution of the historic seaport at Key West Bight. *Florida Keys Sea Heritage Journal*. Vol. 10, No. 3.

## ***Early History (1912-1975): Emergence of the Fishing Industry***

Henry Flagler's dream of extending a rail system from Florida's mainland to the southern tip of the Keys was realized in January of 1912. This single event helped to unleash the economic potential of Monroe County and allowed for an accelerated pace of development by establishing a reliable land route for transportation of people and goods. At this time, the main economic industries in the Keys were the commercial fishing industry, a farming industry, military operations, and a cigar manufacturing trade (although this industry was on the decline). In the 1920s, improvements in local infrastructure, primarily to serve the military, soon followed the rail system, and the Keys experienced a land boom along with the rest of Florida.<sup>22</sup>

The wilderness of the prior century soon gave way to a burgeoning tourism industry complete with fishing camps and housing facilities. The growing interest in the Keys also prompted the local government to fund an overseas highway project that would provide access for automobiles into the Keys. Farmers soon were replaced by new landowners from the north, as subdivisions replaced the once farmed landscape. Clearly the Keys underwent unprecedented change and growth during this time period.

There was great optimism in the 1920s but it would be relatively short-lived as the next decade began. The nation sank into the Great Depression, and the Keys were especially vulnerable because of the recent shift in the local economy. At the time of the Depression, the cigar industry had vanished, the farming industry was stripped of cultivatable land, and military operations were scaled back by the federal government. The budding tourism industry also wilted under the challenging times, and Monroe County was forced into bankruptcy.<sup>23</sup> The commercial fishing industry remained the only reliable sector contributing to the local economy.<sup>24</sup>

Despite the economic downturn, fishing vessels continued to return to the harbors with a bountiful harvest that included sea catches such as sponges, crabs, lobster, and many different kinds of finfish. This initiated commercial fishing as an important part of the Keys' economy. The consensus of the stakeholders interviewed for this study was that commercial fishing had a major historical impact on both the economy and culture of the Keys.

Reliance on the marine industries increased even further when the Labor Day Hurricane of 1935 destroyed portions of the uncompleted highway, in addition to 40

---

<sup>22</sup> Historical Preservation Society of the Upper Keys. (Not dated). History of Key West. Retrieved on June 29, 2005 at <http://www.keyshistory.org/keywest.html>.

<sup>23</sup> Historical Preservation Society of the Upper Keys. (Not dated). History of the Overseas Highway. Retrieved on June 29, 2005 at <http://www.keyshistory.org/osh.html>.

<sup>24</sup> Great Locations. (2005). History of the Florida Keys, *Great Locations, Florida Keys/Key West*. Summer 2005 Edition.

miles of the railroad system in the Upper Keys.<sup>25</sup> Maritime transportation (ferries, freighters) had to be reestablished in order to move people and goods from one island to the next. It was an unintended display of getting back to their roots as residents and businesses of the Keys continued their daily activities by using sea vessels until a land route could be reconstructed for travel and transportation by automobile. Using a combination of the overseas highway infrastructure and Flagler's railroad bridges, an overseas transportation route for automobiles was finally completed in March of 1938.

As with much of the nation, the Keys' economy improved as the nation found itself in the midst of World War II. Key West's military operations were expanded, the completed highway allowed for tourism to return to the Keys, and the commercial fishing industry increased its exports to unforeseen levels. In 1942, Monroe County obtained electric and water services to support the strong military presence in Key West. The United States military prevailed in the war, and growth was just beyond the horizon. The successful conclusion of the war would again reduce the demand for military presence in the Keys, but this time its effects were masked by economic growth in other industries and the discovery of the resource-rich waters surrounding the Keys.

It was 1949 when the most valuable fishery in the Keys was discovered: the Tortugas pink shrimp or what became known as "pink gold." This jumbo shrimp was considered to be superior to others because of its size and delectable flavor, and the landings were both reliable and plentiful. The chase for these crustaceans became known as the



"pink gold rush" and news of this bonanza spread throughout ports from the Gulf of Mexico to the Atlantic Ocean. By the spring of 1950, almost 300 vessels had relocated to the waters off the Keys to trawl what became known as the "Tortugas Grounds."<sup>26</sup>

The newly discovered resource had a reinvigorating effect on the local economy of the Keys. Established fish and ice houses (used for packing and shipping seafood) expanded their operations to account for the increased activity, more seafood dealers began to base their operations in the Keys, and new employment operations were created. The prosperity experienced by the fishermen also benefited other professions

---

<sup>25</sup> Historical Preservation Society of the Upper Keys. (Not dated). History of Key West. Retrieved on June 29, 2005 at <http://www.keyshistory.org/keywest.html>.

<sup>26</sup> Little, Edward J. (2000). An overview of the evolution of the historic seaport at Key West Bight. *Florida Keys Sea Heritage Journal* Vol. 10, No. 3.

directly or indirectly, such as bookkeepers, truck drivers, and restaurant helpers. The export of the shrimp to other regions also served the local economy by continuously directing money into the region from outside areas. The success of the fishing industry was unhampered until the 1980s when catch rates declined and operating costs increased, resulting in only marginal profits.<sup>27</sup> Several stakeholders interviewed had lived and worked in the Keys for more than 20 or 30 years. They also commented on this change, as it was quite noticeable.

It was also during the 1950s that mosquito control was implemented on the islands and that Southern Bell installed a telephone line for Marathon, Matecumbe, and Key Largo. All the ingredients for growth were now present, and the recognition of the area as a premier fishing destination was well-known. For the next two decades, the islands outside Key West experienced unprecedented development and population growth. New residents brought with them professional skills from other areas and soon residents of the Keys enjoyed all the typical urban services, such as medical offices, movie theaters, restaurants, supermarkets, and night spots. Government services, such as schools, fire departments, and police service, were also needed to accompany increased development. Ramshackle fish camps were improved to rival urban luxury resorts, and living quarters were supplemented with modern accommodations.

The growth was said to be so rapid that a tourist returning after only two to three years would be surprised by all the changes. In fact, one interviewee noted, "there has always been change." Nonetheless, many citizens welcomed the prosperity created by new growth and development. One commentary in the *New York Times* described the ensuing changes:

*The rough shanty roadside restaurants have been replaced by deluxe restaurants, some attached to hotels and motels; the rough roadside fishing camps have been supplemented by modern accommodations. But none of this has altered the magnificent blues and greens of the water on both sides of the Overseas Highway, the blue of the sky and white cloud formations, nor the warmth and persistence of the sunshine.*<sup>28</sup>

The rapid development experienced in the Keys did not subside in the 1950s and 1960s, and soon there was widespread concern that unrestrained development would destroy the unique tropical paradise that was treasured by all. The public outcry for protecting the Keys from further development soon enabled public officials to set areas aside for preservation such as the Big Pine Key National Wildlife Refuge (1957), John Pennekamp State Park (1963), Lignumvitae Key Aquatic Preserve (1969), and Indian Key State Park (1971). Following the national trend, the Keys began to reassess the impact of human

---

<sup>27</sup> Little, Edward J. (2000). An overview of the evolution of the historic seaport at Key West Bight. *Florida Keys Sea Heritage Journal* Vol. 10, No. 3.

<sup>28</sup> A.L.H. (Jan. 17, 1954). The Keys Busy Again. *The New York Times*. Available online from ProQuest Historical Newspapers at <http://www.proquest.umi.com>.



development on natural systems and ecosystems. The growth experienced in the 1950s and 1960s was phenomenal.



By the 1970s, there was a clear shift in perspective by the general public, and the Keys' environment was no longer described as simply beautiful and exotic but also as a fragile living ecosystem deserving protection. The nation as a whole was in the midst of an environmental movement, and concerns for the Keys were never stronger. Across the nation there was support for the

establishment of the U.S. Environmental Protection Agency, stronger environmental regulations, and programs promoting greater environmental awareness. In Florida, the most significant legislation for the Keys was the State of Florida's Land and Management Act of 1972. It was this act that enabled the state to designate an area as a "critical state concern" and exert land use controls to guide and restrict development within that area.<sup>29</sup>

The early 1970s was also the beginning of drastic economic change for Key West and Monroe County. The end of the 1962 Cuban Missile Crisis caused a spiral in military activity and supported growth in the local economy, but it was short-lived. The military continued to decline, and soon it became evident that the local economy was again in a vulnerable state. The economic downturn, however, was relatively unnoticed by many because the local economy already shifted its reliance onto the tourism industry, which was booming. In fact, by 1973 it was said that the tourism industry already accounted for 78 percent of the Keys' economy.<sup>30</sup> This change was generally noted by the full range of stakeholders interviewed for this study.

---

<sup>29</sup> Land and Water Management Act, Florida Statute Sec. 380.05 (1972).

<sup>30</sup> Nordheimer, Jon. (Dec. 13, 1973). Boom in Land Development Stirs Fears for Ecology of Florida Keys. *The New York Times*. Available online from ProQuest Historical Newspapers at <http://www.proquest.umi.com>.

## **Late History (1975-2004): The Dominance of Tourism**

In 1975, the State of Florida declared the Keys an Area of Critical State Concern due to its rapid development, scenic beauty, and prevalence of a number of natural, environmental, historic, and economic resources. This designation by the state transferred review and approval rights of development to the Florida Department of Community Affairs, while allowing Monroe County to maintain its local planning and zoning functions.

Proponents of the measure argued that the local government had been ineffective in dealing with the demands for development in the region and blamed the dredge-and-fill techniques of developers for the widespread environmental destruction experienced on the shorelines and reefs. They were eager to have the state intervene in local land use decisions. Opponents, however, compared the state intervention to Hitler's Nazi invasion of Poland and threatened challenges in the courts,<sup>31</sup> a sentiment echoed by a few of the stakeholders interviewed. The designation was maintained, and Monroe County soon responded by initiating its first draft of a new Comprehensive Plan intended to meet the state's criteria.



The winter tourist season of 1975 was touted as “excellent,” and future season predictions were optimistic. Many residents enjoyed the fruits of a successful tourist economy but were reluctant to allow it to change the character of the Keys or to permit greater development in the area. In fact, the most frequent complaint of the newly settled residents was that development in the area should be halted.<sup>32</sup> The inability of Monroe County to manage its growth prompted many developers to illegally obtain a permit or to clear land without one. Changes were happening so rapidly and with such environmental destruction that many native *conchs*<sup>33</sup> started to resent any newcomers.<sup>34</sup>

---

<sup>31</sup> No Author (Apr. 22, 1975). Florida Takes Control of Development of the Keys. *The New York Times*. Available online from ProQuest Historical Newspapers at <http://www.proquest.umi.com>.

<sup>32</sup> Nordheimer, Jon. (Dec. 13, 1973). Boom in Land Development Stirs Fears for Ecology of Florida Keys. *The New York Times*. Available online from ProQuest Historical Newspapers at <http://www.proquest.umi.com>.

<sup>33</sup> A conch is a nickname given to a life-long resident of the Florida Keys. Origin of the term has been traced back to the early 1800s when Bahamians inhabited the Keys and used conchs (large sea snails) as a main source of food. New settlers to the Keys called these Bahamians *conchs* and the term has now expanded to include any citizen born and raised in the Florida Keys. Williams, Joy. (2003). *The Florida Keys: A History and Guide*, Tenth Edition.



At about this time, the Key West Bight was in a period of transition from promoting commercial fishing operations to accommodating tourist-based amenities near Key West Harbor.<sup>35</sup> The unrelenting drive for tourism in Key West forced many commercial fisherman to choose between relocating their operations



or abandoning the industry altogether. The vast majority of interviewees agreed with this assessment. Several decided to relocate to Stock Island a few miles north of Key West because it also possessed the needed infrastructure to support commercial fishing. Its location also provided relief from the immense development pressure in Key West.

The 1980s brought more tourists to the Keys, and by this time it had become Monroe County's number one industry.<sup>36</sup> The number of recreational and commercial (non-fishing) businesses were rising dramatically, and shoreside owners realized that greater



profits could be generated by leasing out dock space to such tourist-supporting vessels.<sup>37</sup> Stakeholders interviewed also noted that recreational marine-related businesses were on the increase during this timeframe. As with any vacation destination, the Keys realized that they must have the necessary infrastructure to accommodate visitor needs for hotels, restaurants, shops, and

attractions. The recreational fishing and boating industry was naturally an operation that would grow in success as tourism expanded.

<sup>34</sup> Alexander, Ron. (Apr. 7, 1979). In Key West, the Latest 'Invaders' Have Set Off a Backlash. *The New York Times*. Available online from ProQuest Historical Newspapers at <http://www.proquest.umi.com>.

<sup>35</sup> Little, Edward J. (2000). An overview of the evolution of the historic seaport at Key West Bight. *Florida Keys Sea Heritage Journal* Vol. 10, No. 3.

<sup>36</sup> Vaughan, Chris. (Apr. 7, 1985). Tourists Flocking To Keys in Unprecedented Numbers. *The Miami Herald*. Available online from ProQuest Historical Newspapers at <http://www.proquest.umi.com>.

<sup>37</sup> Schittone, Joseph. (2001). Tourism vs. commercial fishers: development and changing use of Key West and Stock Island, Florida. *Ocean and Coastal Management*. Vol. 44, pp. 15-37.

Property with waterfront access increased in value as tourists demanded locations overlooking the water and with easy access to it. In Key West, the “average working man” was being forced out of town because of rising housing costs. Department of Community Affairs Secretary John M. DeGrove tried to reassure residents but admitted that finding affordable housing was indeed a problem in Key West in 1984.<sup>38</sup> Monroe County also had to deal with growth issues, and planning consultants were hired to develop recommendations outlining ways that the county could maintain its growth while preserving the Key’s character.<sup>39</sup> At this time, the concerns were maintaining affordable housing, providing areas for commercial fishing operations, and preserving a quality coastal environment. (Time and time again, the stakeholders interviewed for this current report agreed that affordable housing is still a “tremendous” issue.)

In 1984, the media reported the ineffectiveness of Monroe County and the Florida Department of Community Affairs in dealing with the Keys’ land use problems. The Department of Community Affairs was said to be understaffed and lacking the enforcement capabilities needed to make a difference. The Monroe County Building Department was found inadequate by county officials.<sup>40</sup> A few months later, the findings of a University of Florida report concluded that the county’s land-planning methods were archaic, unsophisticated, and unable to properly control growth. The report also cited four main problems with the current system: (1) lack of information when making planning decisions; (2) lack of reliance by planning boards on a land use plan; (3) lack of established procedure for permit applications from local, state, and federal agencies; and (4) lack of effective public participation in land use planning decisions.



The best tourist season ever experienced was in 1985. The Tourist Development Council proudly proclaimed that the success would likely continue. At the same time, however, the explosion in the number of low-paying jobs in Key West was coupled with a critical shortage of affordable housing. The situation was described as a “crisis,” and students, teachers, and government employees were said to be priced out of the Key West

---

<sup>38</sup> Vaughan, Chris. (May 5, 1984). DCA Head Reassures Keys. *The Miami Herald*. Available online from ProQuest Historical Newspapers at <http://www.proquest.umi.com>.

<sup>39</sup> Shillington, Patty. (June 22, 1984). Growth in Keys: Future is at Hand. *The Miami Herald*. Available online from ProQuest Historical Newspapers at <http://www.proquest.umi.com>.

<sup>40</sup> Duffy, B. and Patty Shillington. (Sept. 16, 1984). Strong Tide of Development Erodes Resources in the Keys. *The Miami Herald*. Available online from ProQuest Historical Newspapers at <http://www.proquest.umi.com>.

housing market. A few months later, a statewide study announced that Monroe County was the most expensive place to live in Florida, with housing costs 22% higher than the statewide average, a trend that continues in 2005.<sup>41</sup>

In 1986, Monroe County drafted its 2010 Comprehensive Plan to respond to the Area of Critical State Concern designation, and corresponding land development regulations were put into effect. The intent of the Plan was not only to comply with the State of Florida's regulations, but also to ensure that a high quality of life could be maintained on the islands. There was growing concern that longtime residents who contributed to the unique character of the Keys were being pushed out because of escalating housing prices. National media described how many native Key West residents were leaving for other areas.<sup>42</sup> The 1990 Census found that Key West was growing much more slowly than the rest of the county, only 2% compared to 37%, respectively. Media explained that limited housing opportunities in Key West had prompted many people to relocate to vacant land in the unincorporated areas.<sup>43</sup>

In the early 1990s, Monroe County residents struggled but still managed to find affordable housing and maintain their jobs on the islands. Stock Island was able to provide low-cost housing for the working class, and its image as a neighborhood was improving. Stock Island was also described as the place where "those who keep Key West going actually live."<sup>44</sup> Although the importance of Stock Island to Key West was critical, this was misunderstood by most. In 1991, the Monroe County Board of County Commissioners ratified the 2010 Comprehensive Plan, and again in 1993, following several legal challenges initiated by the Department of Community Affairs and other private organizations.

---

<sup>41</sup> Babson, Jennifer. (Jan. 10, 2005). Home Prices Invite Exodus. *The Miami Herald*. Available online from Access World News at <http://infoweb.newsbank.com>.

<sup>42</sup> Nordheimer, Jon. (June 10, 1988). Isle Basks in Success, But the Fun is Fading. *The New York Times*. Available online from ProQuest Historical Newspapers at <http://www.proquest.umi.com>.

<sup>43</sup> Keating, Dan. (Jan. 26, 1991). Growth Booming in County. *The Miami Herald*. Available online from ProQuest Historical Newspapers at <http://www.proquest.umi.com>.

<sup>44</sup> Keating, Dan. (Dec. 30, 1992). Stock Island Turns the Corner Crime, Disorder Declining, Most Say. *The Miami Herald*. Available online from ProQuest Historical Newspapers at <http://www.proquest.umi.com>.



## Changes in Commercial Fishing

In November of 1994, Amendment Three of the Florida Constitution, otherwise known as the *net ban*, was approved by voter referendum. Under the amendment, it became a crime to use entangling nets in Florida waters and restricted other forms of nets commonly used by the commercial fishing industry. The decision was said to be a virtual death sentence to those who depended on commercial fishing for a living.<sup>45</sup> One fisherman lamented, “It would not surprise me if, in the future, you saw condos along the waterfront instead of fishing boats and ice factories. And all the seafood you eat here will come from Taiwan.”

In fact, several stakeholders interviewed for this study cited competition from imported seafood as a main threat to the commercial fishing industry in Monroe County. The response of recreational fishermen was quite different, however, since their pay is based on a customer’s experience, and a rod and reel are used for landing fish. Understandably, many



“sportsmen” celebrated the passage of the net ban and were optimistic about its effects on their business.

An evaluation of the effects of the net ban in 2002 was designed to identify observable changes in the commercial fishing industry and direct linkages to the nature of changing events that occurred simultaneously in Florida’s economy, natural environment, and marine resource regulatory process. The report concluded:

*The ban has had a dramatic impact on the nature of near-shore commercial fisheries in Florida, primarily through the reduction in landings for several near-shore species. The short-term negative impacts of the net ban have been absorbed by the small-scale commercial finfish businesses. These negative impacts have been manifested by changes in income sources, business management activities, fishing patterns, and species targeted.*<sup>46</sup>

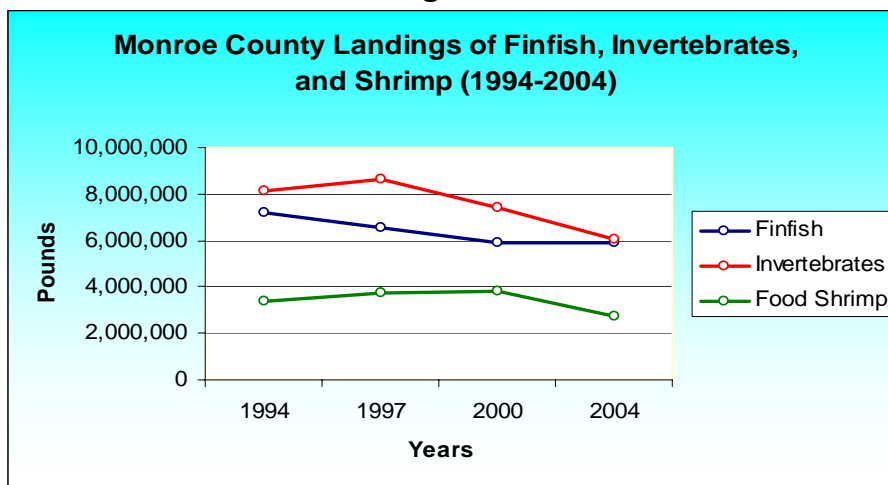
---

<sup>45</sup> Browning, Michael. (Nov. 10, 1994). Net Ban Leaves Towns in Search of New Soul. *The Miami Herald*. Available online from ProQuest Historical Newspapers at <http://www.proquest.umi.com>.

<sup>46</sup> Adams, C., Jacobs, S., and S. Smith. (2002). What happened after the Net Ban? Accessed 6/29/05 at <http://edis.ifas.ufl.edu/FE123>.

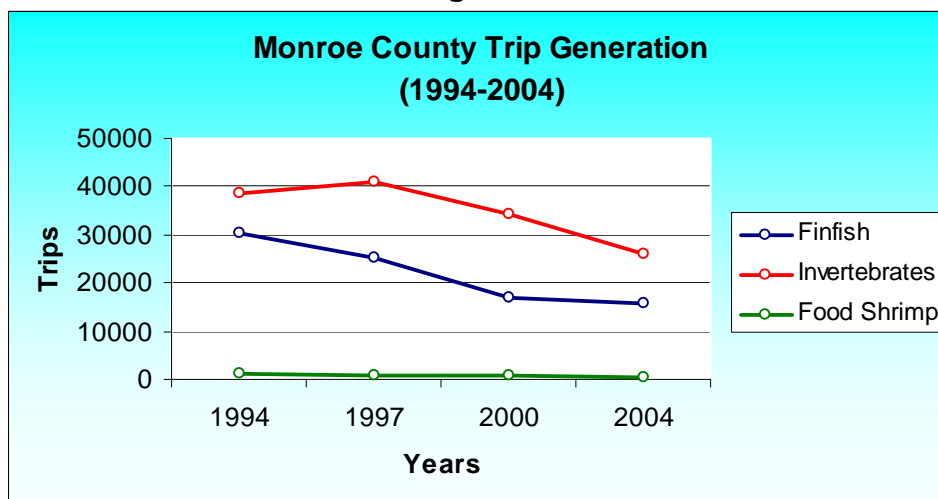
The Florida Fish and Wildlife Conservation Commission has recorded commercial fishing statistics since the adoption of the Florida net ban in 1994. Monroe County data have been examined specifically to provide clues to the status of the commercial fishing industry. In Monroe County, the total finfish landed were 7,210,904 pounds in 1994 compared to 5,911,544 using 2004's estimates, which translates into an 18 percent decrease (Fig. 1).

**Figure 1**



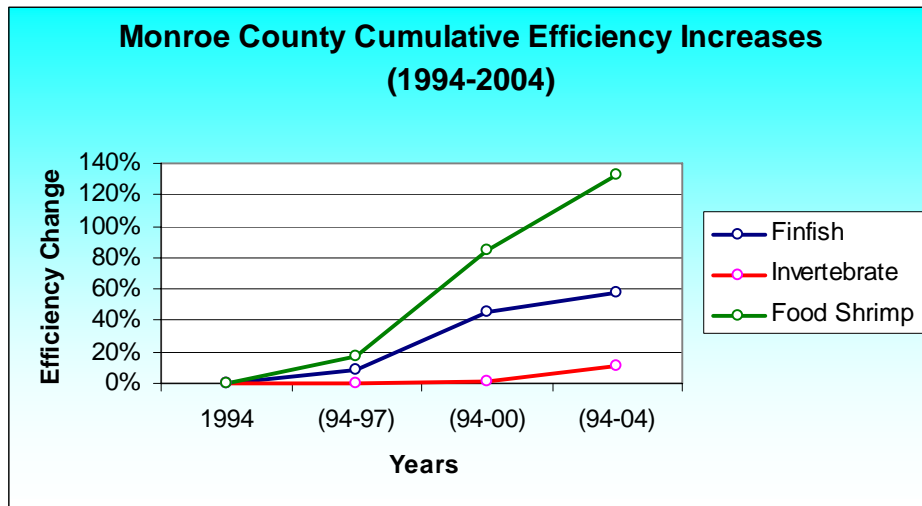
During the same period however, the number of trips pursuing finfish declined by 48 percent (Fig. 2), resulting in an overall increase in pounds per trip.

**Figure 2**



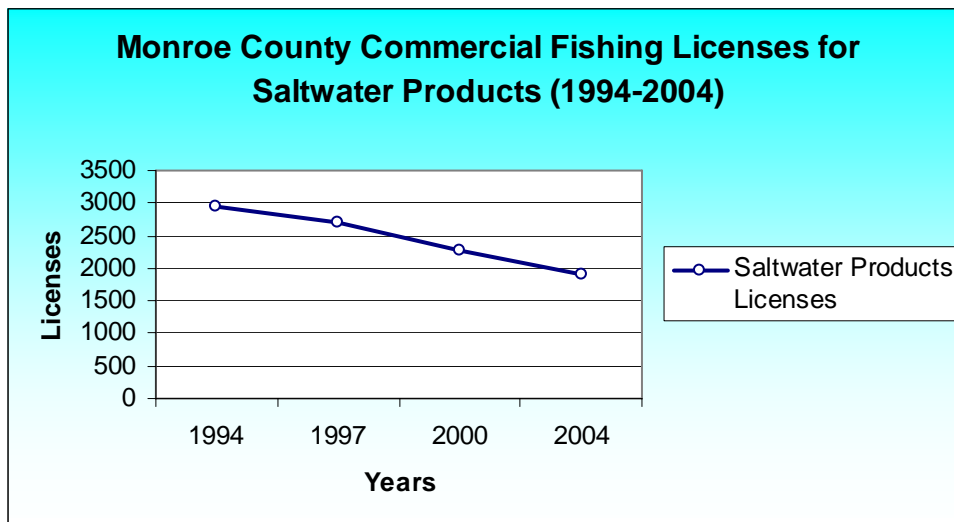
When the total pounds of invertebrates are divided by the total amount of trips made to catch the invertebrates, it was found that the pounds per trip have also increased from 1994 to 2004.

Figure 3



This would suggest that the industry as a whole may be declining, but those that remain in business are becoming more efficient based on landings per trip (Fig. 3). Commercial fishing statistics compiled on food shrimp also show a similar trend. Overall, there has been a 35.7% decrease in the number of commercial fishing licenses held for saltwater products (Fig. 4), representing a decrease in the size of the commercial fishing industry.<sup>47</sup>

Figure 4



In 1996, Monroe County Year 2010 Comprehensive Plan was brought into compliance, and a carrying capacity approach to growth management was approved. The U.S.

<sup>47</sup> Fish and Wildlife Research Institute. Fiscal Year License Summaries, (1994-2004). Accessed 7/22/05 at <http://www.floridamarine.org/features>.

Army Corps of Engineers and the Florida Department of Community Affairs contracted with URS Corporation, and the final report was completed in September of 2002. This final document is a culmination of efforts to compile, analyze, and interpret existing data regarding the ability of the Florida Keys to withstand all impacts of additional land development activities. The report was designed to also consider aesthetic, socioeconomic, quality of life, and community character issues, concentration of population, amount of open space, diversity of habitats, and species richness. The Florida Keys Carrying Capacity Study also fulfilled a portion of the state and local government requirements as outlined in Florida Administrative Commission Rules.<sup>48</sup>

In early 2000, a survey found that a majority of Monroe County residents favor less tourism and fewer tax dollars spent advertising and promoting it.<sup>49</sup> While the results were contested by some, it did confirm that some residents perceived that tourism had a diminishing effect on their quality of life. Nevertheless, a number of interviewees for this study acknowledged that tourism as an economic engine is fueled by marine-related industries, especially the recreational working waterfront and related businesses. Still, the huge increase in the number of tourists visiting the Keys has been perceived by some as resulting in the demise of the commercial fishing industry.

By 2001, the affordable housing problem was moving from Key West and spreading throughout Monroe County. Low income and middle income workers were reported leaving the Keys, and employers found it increasingly difficult to hire and retain a sufficient workforce.<sup>50</sup> This trend has continued, and its impact has escalated until the present. Or, in the words of one stakeholder interviewed, the Keys are witnessing “billionaires buying up millionaires.” A recent series of media articles characterized the problem as a mass departure of low and middle income residents resulting from rising home prices.<sup>51</sup> It is projected that 8,545 new housing units will be needed to meet the population projection for the Keys in the year 2030.

## Changes in Population

The Monroe County population grew tremendously in its early days, from the 1940s through the 1980s, but has stabilized since then (Fig. 5). The largest increase was in the period of 1950 to 1960 when the population of the Keys increased by nearly 18,000 residents.

---

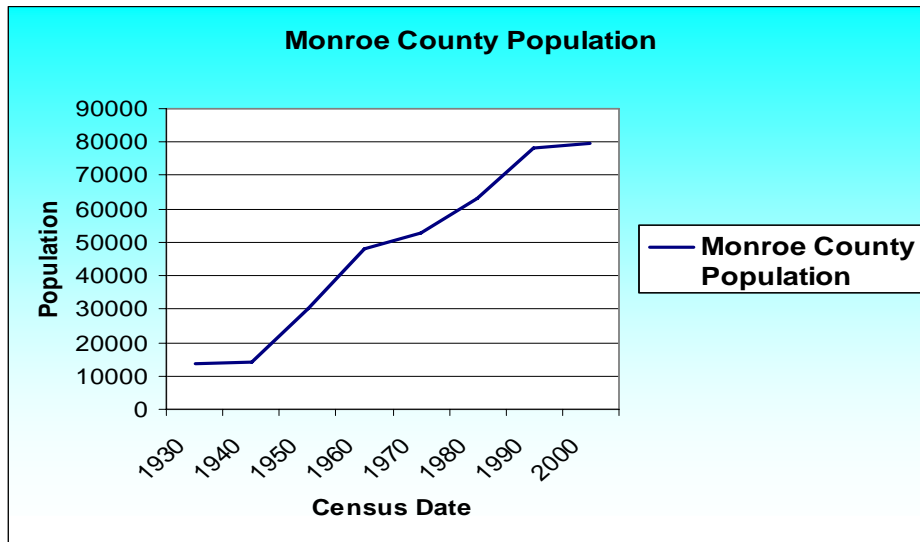
<sup>48</sup> URS Corporation. (September 2002). Florida Keys Carrying Capacity Study, First Revision. Available online at <http://www.saj.usace.army.mil/projects/finalreport02.htm>.

<sup>49</sup> Fuss, Lisa. (Feb. 10, 2000). Keys Residents Want Less Tourism, *The Miami Herald*. Available online from ProQuest Historical Newspapers at <http://www.proquest.umi.com>.

<sup>50</sup> Fuss, Lisa. (Feb. 23, 2001) Housing Costs Hurting Deputies, *The Miami Herald*. Available online from ProQuest Historical Newspapers at <http://www.proquest.umi.com>.

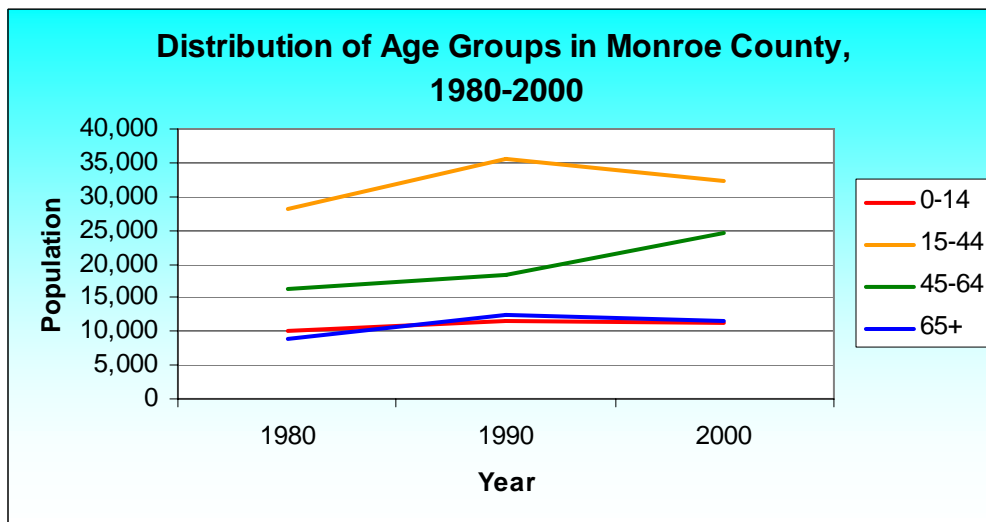
<sup>51</sup> Babson, Jennifer. (Jan. 10, 2005). Home Prices Invite Exodus, *The Miami Herald*. Available online from ProQuest Historical Newspapers at <http://www.proquest.umi.com> and Buckley, Cara. (Apr. 18, 2004). High property values have fisherman feeling pinched. *The Miami Herald*. Available online from ProQuest Historical Newspapers at <http://www.proquest.umi.com>.

**Figure 5**



Population projections for the next 25 years are for the county to maintain its current population level but not to increase substantially. In general, the middle-age population has been growing in the Keys. There has been a slight decrease in the percentage of residents aged 0-14 and 15-44 over the past two decades, and the percentage of residents between the ages of 45-64 has been increasing steadily since 1990 (Fig. 6).

**Figure 6**





The Florida Keys Community College has seen a decline in college enrollment since 2000.<sup>52</sup> School enrollment has declined over the past decade, along with college enrollment.<sup>53</sup> Several stakeholders expressed great concern that this is causing the workforce of the future to abandon the Keys, seeking their livelihoods elsewhere.

The depletion of marine facilities was identified as a major problem by every stakeholder group throughout the interview process. Escalating property values and associated taxes appear to be the driving force behind the sale and redevelopment of many important waterfront non-residential properties. Stakeholders generally agreed with these causes.



The loss of working waterfront has resulted from a transition to non-water dependent uses (e.g., condos) and exclusive marinas (e.g., private mega-yacht marina). If nothing is done to control this redevelopment, the concern is that future losses of waterfront facilities will negatively affect the economy and bring an end to critical marine service industries (e.g., boatyards), commercial marinas which are available to the public, and traditional trades associated with the community character (e.g., commercial fishing and its historical and cultural uses). The commercial fishing industry is once again particularly vulnerable due to their dependence on waterfront land and increasing operating costs.

At a smaller scale, there is considerable effort being put forth in order to protect any remaining public accessible waterfront and/or commercial harbor. The Harbor Preservation/Redevelopment and Corridor Enhancement Plan was created as a component of the Stock Island and Key Haven Livable CommuniKeys Plan.<sup>54</sup> The Plan identified policies written in Monroe County's Year 2010 Comprehensive Plan that would help to preserve the Stock Island waterfront and warned against those that would hasten the effort. The report also identified overlying principles that can help guide the community's future development. A successful redevelopment of Stock Island, as measured by the preservation of the public accessible waterfront, commercial

<sup>52</sup> Florida Community College System (2001-2005). The Fact Book. Available online at [http://www.firn.edu/doe/arm/cctcmis/pubs/factbook/factbook\\_main.htm](http://www.firn.edu/doe/arm/cctcmis/pubs/factbook/factbook_main.htm).

<sup>53</sup> Matley, Alyson. (Aug. 5, 2005). Student numbers unclear, *Keynoter*. Available online at [www.keynoter.com](http://www.keynoter.com).

<sup>54</sup> Wallace Roberts and Todd, LLC. (2005). Harbor Preservation/Redevelopment and Corridor Enhancement Plan for Monroe County, Florida, April Draft Report.

marina, and creation of affordable housing units, is critical due to the recent trend of redevelopment in Monroe County and its proximity to Key West. As a group, the stakeholders interviewed said Stock Island is just about the only place commercial fishing has left. If the island goes the way of redevelopment, “the industry will have no fallback place to relocate.”



## Section 3: The Working Waterfront Today

### *Introduction*

Monroe County is much like any other coastal region in the nation in that it faces immense pressure to redevelop its land according to the highest and best use at a given point in time. Often, the challenge for these coastal communities is to balance the desire to capitalize on short-term economic conditions, with the implementation of a plan guided by a long-term vision as determined by the residents of that community. Monroe County today faces this same challenge, but also remains quite unique compared to other coastal communities because of its certain characteristics. Unfortunately, these characteristics intensify the already immense pressure placed on Monroe County and create further challenges for the community. As the stakeholders who were interviewed for this study agreed, both the character and the demographics of the Florida Keys are changing.

First, Monroe County has a limited amount of developable land due to its geography, environmental regulations, and large conservation areas. This requires that all land



uses needed by a community be allocated enough space to be reasonably accessible to residents. The Keys are also a group of fragmented islands merely connected by a single automobile route (U.S. 1) over most of its region. This limits accessibility because many destination points within the County still must be connected by this single one-directional linkage. Furthermore, the

elongated form of the islands requires that land-uses be spread across a relatively narrow corridor, even though they may be complementary or dependent on one another.

Second, the Keys' economy has become very specialized since the local tourism boom of the 1980s, and the economic environment has remained relatively stable although specific marine sectors have lost shares of their economy. The challenge for Monroe County is to ensure that it does not become overly dependent on one sector and that it remains diverse economically to withstand any unexpected downturns in sectors of the economy. Also, the nature of the tourism industry itself creates a challenge. This is

because the wages paid to service workers often do not support the costs of living in the Keys even though the jobs are in demand. This creates undue stress on the linkages between where people live versus where they work. Therefore, special attention must be made to ensure that infrastructure is adequate to serve all residents' needs.

Finally, Monroe County has a number of distinct natural amenities including its world-renowned coral reefs, turquoise-blue waters, and sunny beaches. The laid-back lifestyle of the residents helps to create the local charm sought by visitors and the varied cultural experiences offered by the Keys are yet another factor fueling real estate prices and demand for condo redevelopment. While many coastal communities are desirable because of their proximity to a water body, the fascination of the Keys is not simply due to its location by the water. The Keys are unique, and extra effort is needed to preserve the characteristics that have contributed towards its popularity over the years.



## ***Studies, Reports and Plans***

Several studies and plans are directed at confronting many of the challenges facing Monroe County. However, these studies are often limited in scope due to the complex interrelationships of the environment, economy, and society. A strategy is needed to address each challenge and connect it to the larger context. While each report can be useful, there must be a deliberate effort to combine the recommendations of each study into an overall strategy for achieving the community's vision. Monroe County has developed the CommuniKeys local community initiative to provide a clearer direction for the development of each community. This strategy can be effective by reducing the scale needed to project a vision tailored to a smaller region, but the challenge of ensuring that the vision works for the entire Keys must be made certain.

The redevelopment pressure on Monroe County's waterfront has been well documented. One recent study<sup>55</sup> suggested that redevelopment is accelerated in Monroe County because the tourism and commercial fishing industries are actually in a

---

<sup>55</sup> Schittone, Joseph. (2001). Tourism vs. commercial fishers: development and changing use of Key West and Stock Island, Florida, *Ocean and Coastal Management*, Vol. 44, pp. 15-37.



spatial conflict. The tourism industry's control of the waterfront has been characterized as a natural progression of events resulting from the greater profits generated by tourist-based operations. In fact, the commercial fisherman were said to be despondent about the outcome, but because the political process was often not conducive to commercial fisherman, the outcome was rarely contested. The report questioned whether commercial fishing would be completely abandoned as a revenue generator even though it has a long and rich history in the Keys. Currently, Stock Island remains one of the last operational ports for commercial fisherman in the Keys, and it too, is under enormous pressure to redevelop into the highest and best use based on today's economic environment.

In 2003, the Florida Keys Carrying Capacity Study was completed to assess the ability of the Florida Keys ecosystem to withstand all impacts of additional development.<sup>56</sup> The study mapped environmentally sensitive land, as well as land suitable for increased development. Four guiding principles for growth management were identified: (1) to prevent encroachment into native habitat, (2) continue and intensify existing programs dealing with environmental and quality of life issues, (3) focus on redevelopment and infill, and (4) increase efforts to manage ecological resources. Currently, the findings of the carrying capacity study are being used to draft the new Monroe County Comprehensive Plan under the Livable CommuniKeys Initiative.

In late 2004, another report concluded that there is indeed a decline in the working waterfront and loss of public access to the waterfront.<sup>57</sup> The pressures to redevelop into private residential and other non-water dependent uses are believed to be exacerbated by the increasing property values and associated taxes levied on waterfront parcels. The higher taxes were also believed to reduce profits for many marine business owners, prompting them to sell their business. It was believed that the conversion to non-water dependent uses may help to provide a short-term economic generator but the long-term benefits could not be guaranteed.

Finally, a study was conducted on the impact of a post-embargo Cuba on Florida's marine industries.<sup>58</sup> The study warned that marine facilities could potentially develop on Cuba's coast and provide direct competition to the many marinas found in Florida and its Keys. The development of tourism in Cuba was said to be a priority of the government that may eventually impact the future successes of Florida's tourism industry. One example of this would be a change in the routing of cruise ships, by-

---

<sup>56</sup> Calvo, R., Conaway, K.M., and McGarry, T. (2005) Community Planning in the Florida Keys: Environmental and Public Input to Develop Livable CommuniKeys. Proceedings of the 14<sup>th</sup> Biennial Coastal Zone Conference: July 17 to 21, 2005.

<sup>57</sup> Committee on Community Affairs. (2004). Working Waterfronts: Report Number 2005-122. In response to the loss of working waterfront, the Monroe County Board of County Commissioners in July 2005 issued a nine-month emergency moratorium on waterfront redevelopment.

<sup>58</sup> Cato, James. (1994). The Impact on Florida's Marina and Recreational Boating Based Industries of a Post-Embargo Cuba: The Need to Plan Now.

passing Key West in favor of a Cuban destination. Another is the threat that Cuban fisherman will replace local Keys fisherman by offering the same products at lower prices.<sup>59</sup> The study encourages communities to consider the effects of a post-embargo Cuba and to develop a strategic plan to take advantage of opportunities and minimize negative effects of such an occurrence.

## **Upper Keys Plans**

At the time of this report, the CommuniKeys Key Largo plan was in the early stages of planning so little reference can be made specifically addressing the Key Largo plan. However, it is expected that the community will also project a vision that capitalizes on its proximity to the water, and strive to protect the vast number of natural resources available to the area. After all, Key Largo is home to many ecotourism-based businesses that thrive from the availability of an attractive, publicly accessible waterfront. Also, the community is believed to desire a greater community identity as many travelers pass through the area en route to southern destinations. A stakeholder interviewed noted that recreational charter boat operations in Key Largo were often visited by day-use snorkelers and scuba divers.

The community spanning from Tavernier Creek to mile marker 97 has developed a plan to celebrate its rich history and character of the island by striving to protect its historic district. The community would like to create a commercial enhancement plan (as opposed to a redevelopment plan) that compliments the historic district and helps to identify the districts boundaries. The community prefers limited redevelopment of its commercial properties, but would like to improve the visual character of U.S. 1. Finally, the community wants to ensure that there is adequate access to the waterfront, and the community stresses the need to create housing for working-class people, as well as maintain and improve the housing that already exist.

The Village of Islamorada has also identified the need to protect public access to the waterfront and limit the impact that new and existing development has on the natural environment.<sup>60</sup> While no new marinas are expected to be permitted in the future, a stakeholder interviewed noted that marinas in Islamorada are also being lost to redevelopment. The stakeholder further mentioned that Islamorada's economy has relied on the recreational fishing industry and a small amount of commercial fishing. There is concern that storage space for lobster and stone crab traps will not be available in the future.

---

<sup>59</sup> Schittone, Joseph. (2001). Tourism vs. commercial fishers: development and changing use of Key West and Stock Island, Florida, *Ocean and Coastal Management* Vol. 44, pp. 15-37.

<sup>60</sup> The Village of Islamorada (2001). Islamorada, Village of Islands Comprehensive Plan. Chapter 5-1.

## Middle Keys Plans

The City of Marathon has been working on a Marina Siting Plan this year in cooperation with the Four Gates Company, Inc.<sup>61</sup> The plan stresses the important function that marinas play in activating the waterfront and their contribution to the local economy. It



also urges protection and expansion of the working waterfront, including commercial fishing enterprises and boat repair businesses. A dedicated effort will be made to celebrate the history of the waterfront in the City of Marathon. The protection of marinas and other marine facilities in the incorporated areas of Monroe County will also help to stabilize the demand on current boat slips

and docks in unincorporated Monroe County. One stakeholder interviewed for this report noted that Marathon's industry consisted of stone crab and lobster harvesting, which were predominant at one time. Today, the stakeholder believed that there is more of a mix of industries, including recreational fishing and diving operations.

## Lower Keys Plans

The Community of Big Pine Key and No Name Key would like to maintain their rural character while allowing some future development. The residents would also like to create a stronger sense of community by developing a community gathering place and/or more active recreational facilities. The residents desire to live in harmony with the natural world, and the sustainability of endangered species and natural resources is a main concern. The residents of the community also want to promote home ownership as opposed to rental properties. Traffic relief is also desired. Finally, the residents of Big Pine Key demand a responsive and effective government to serve their needs. A stakeholder interviewed noted that Big Pine Key has experienced a change in its residential communities, largely as a result of condominium conversions. Another stakeholder noted that the deep-rooted conservation ethic of the 1970s, when population consisted mostly of retirees, is now giving way as more families and entrepreneurs move in. For example, Key Deer are increasingly being viewed as an obstacle to progress and development, rather than as a species to be conserved.

Monroe County Government is gathering input from the Stock Island and Key Haven community as basis for the CommuniKeys Plan. While still in its preliminary stage, the

---

<sup>61</sup> The Four Gates Company, Inc. (2005). City of Marathon, Marina Siting Plan, Preliminary Draft May 9, 2005.

community has voiced the opinion that commercial fishing should be preserved in the port area. The community would like to encourage a mix of uses that attract desirable development and create diverse housing types that can support workers in the commercial fishing industry. The community also desires a community center and expanded recreational opportunities. Finally, the residents would like to remove trash and abandoned cars from the community, raise design standards, and reinforce its character as a “fishing village.”

Key West has initiated a marina siting plan and deepwater port master plan, which will include Navy property given to the City. Moreover, a major plan is underway to develop an overseas greenway as part of the Florida Keys Overseas Heritage Trail, which is to include a Key West Bike Path. Opportunities based on travel to and from Cuba are also being considered in future plan-making. An interviewed stakeholder explained that commercial fishing no longer exists in Key West, only recreational. The stakeholder also recalled that marine-related businesses were bought up in the 1980s as the government pursued the tourist trade. Finally, a common theme among government and interviewees is that Key West is always changing.



## **Conclusion**

Monroe County is part of a larger group of South Florida communities facing pressure to redevelop its waterfront because of its increasing land values. The loss of working waterfront in the Keys has the potential to negatively impact the region’s economy as a whole, as well as its own local economy. The loss of publicly accessible waterfront will lower the quality of life experienced by residents and visitors of Monroe County. The County has an opportunity to lead the region with bold, innovative solutions that have plagued South Florida for decades. The limited scale of the Keys provides an excellent opportunity to explore the dynamics of this issue and test how the issue can be adequately addressed. While all South Florida communities are facing the same issue, Monroe County particularly has greater potential to lead the way working with the state due to its designation as an area of critical concern. The ability to balance development with the natural world and improve the quality of life experienced by residents and visitors will be a noble challenge.



## **Section 4:      Analysis of Key Stakeholder Interviews**

### ***Introduction***

Interviews were conducted in May and June of 2005 with 26 stakeholders throughout Monroe County, including those in the Upper, Middle, and Lower Keys. The interviews covered discussions with a range of stakeholders, including local, state, and federal government officials; commercial fishermen; the recreational marine industry; nongovernmental organizations (NGOs); media; developers; and community activists. The interviews were designed to track stakeholder perspectives on the history and future of the Keys, with a particular focus on how to preserve the working waterfront in the face of limited land and escalating land values. Organization of this report is based on responses to the main questions, which serve as the topical headings below.

### ***Historical Impact of the Working Waterfront***

#### **Government**

When asked to describe the working waterfront and its historical impact on the Florida Keys, interviewees representing various levels of government all agreed that the working waterfront, in general, and commercial fishing, in particular, have had a significant long-term impact on Monroe County. This group of stakeholders provided in-depth information about the history of both commercial and recreational aspects of the working waterfront. A number of these respondents have held positions in government agencies for 10, 20, even 30 years or more.

#### **Marine Industries**

##### ***Commercial***

Commercial fishing interests interviewed also had a long history of living and working in Monroe County. Some of their families have been there for several generations.

Many noted that the flavor of Monroe County and Key West in particular used to be commercial fishing. Respondents felt that the County at one time did make an effort to market their industry but this effort was not sustained. Eventually, the County was perceived as abandoning the commercial fishing industry.

##### ***Recreational***

As did a large number of the other respondents, stakeholders representing the recreational side of marine-related industries had decades-long experience of living and working in the Keys. It was noted that Key Largo Fisheries had a historical impact as part of the working waterfront in the Upper Keys. However, the number of marine-related commercial ventures was more limited in this area than in the other parts of

Monroe County. Nevertheless, one interviewee believed that at one time there were approximately two dozen commercial fishing operations in the Card Sound Road area.

### **Nongovernmental Organization**

Interviewees from the nongovernmental organizations have resided in the Keys for more than 20 years. Like other stakeholder groups, they also felt that commercial and sport fishing have been important historically with respect to both the economy and culture of Monroe County. Marine-related industries have served as a valuable source of jobs for many people; these businesses have historically been a driver of economic development. Especially in the Key West Bight area, fishing, shrimping, and crayfish harvesting were once the major industries. Supporting facilities, such as a large ice plant and boat ramp, were once prominent features of Old Town Key West. A deeply rooted maritime tradition was evident in the past.

### **Other Stakeholders (Developers, Realtors, Media, Citizens)**

The overwhelming consensus from this group of stakeholders is that the working waterfront has been of such historical importance to Monroe County that without it the entire character of the Keys would change.

## ***Change in the Working Waterfront Over Time***

### **Government**

Interestingly, several of these respondents remarked that the one thing about the Keys that has remained constant is that the Keys are always changing. This is especially apparent with respect to residents' and visitors' relationship to the water.

"There has always been change," said one interviewee, but change may be perceived in different ways. For example, Monroe County demographics are changing, as housing prices and property values continue to soar. This affects both employers and employees in a wide range of employment sectors throughout the Keys. Even though there was overwhelming consensus across the entire stakeholder spectrum that "the housing issue is tremendous," several interviewees commented that "fewer people may not be a bad thing."

Yet, school enrollment is declining and it is becoming increasingly difficult to attract teachers, administrators, and other professionals such as nurses because of the high cost of Keys living. Following high-school graduation, many young people leave Monroe County for similar reasons. Historically, it was not uncommon to find several generations of the same family who made a decent livelihood fishing the Keys. Now, these young sons and daughters, who once had hopes of continuing in the family business, are leaving the area in search of other occupations and a more affordable lifestyle.

There was overwhelming consensus that both the character and the demographics of the Florida Keys are changing. Several respondents are of the opinion that many of the new property owners and other newcomers have little to no appreciation for the working waterfront, community character, or environmental considerations of Monroe County. They will need time and perhaps a broad-based public-outreach and education effort to become vested in their new communities. Moreover, visitors are often perceived as being in the Keys simply “for the thrill of enjoying and exploiting the environment.”

The months of September through December used to be quiet times when the locals could “regenerate.” More recently, however, (and similar to other areas of Florida such as Miami-Dade, Broward, and Palm Beach counties and parts of the state’s West Coast), the Keys’ economy has been in full swing year-round, thanks largely to an overwhelming response to the highly successful marketing strategy of the Tourist Development Council.

One commentator noted that the Tourist Development Council began marketing tourism in the mid 1980s and this continued for a 20-year period. Another said that tourism peaked in the late 1970s and 1980s when the water pipeline was rebuilt and the Keys bridges were widened and improved.

The following observations were also provided by this set of stakeholders:

**Key Largo** now has more day-use snorkelers and scuba divers, who rely on recreational charter-boat operations.

**Islamorada’s** economy has relied on offshore and backwater flats that support a valuable recreational fishing industry; however, marinas are now being lost to redevelopment. The small commercial fishing industry on Islamorada may suffer unless long-term leases are granted on the Florida Department of Transportation (FDOT) rights-of-way used for lobster and stone crab trap storage.

**Marathon’s** industry consisted of stone crab and lobster harvesting, which were predominant at one time. Now there is more of a mix of industries, including recreational fishing and diving operations.

**Big Pine Key** has experienced a change in its residential communities, largely as a result of condominium conversions. One commentator noted that the deep-rooted conservation ethic of the ’70s, when the population consisted mostly of retirees, is now giving way as more families and entrepreneurs move in. For example, Key Deer are increasingly being viewed as an obstacle to progress and development, rather than as a species to be preserved and conserved.

**Key West** no longer has commercial fishing, only recreational. The Navy moved out in the early 1970s, which led to an economic depression for Key West. Marine-related

businesses were bought up downtown in the pursuit of the tourist trade. Until the 1980s, the working waterfront was the major attraction with fresh fish available at dockside. Once this industry shifted to Stock Island, Key West has had less access to fresh fish. A common theme among government and other interviewees is that Key West is always changing.

## **Marine Industries**

### ***Commercial***

Stakeholders from the commercial fishing industry stated that their situation first changed 20 to 25 years ago when the County stopped promoting commercial fishing, switching instead to tourism expansion. This was due in part to closure of the Key West naval base and the need to fill voids in the economy.

The turning point came in the early '70s through the '80s, after the Tourist Development Council had passed a bed tax and tourism began expanding. Recreational fishing, together with associated marinas, also saw an increase in business (due to the electronic revolution of GPS navigational systems for locating fish). It is believed that commercial fishing began contracting largely because of environmental concerns. Increased regulations, the net ban, and the creation of two federal councils (South Atlantic and Gulf of Mexico Fishery Management Councils) caused a decline in commercial fishing. One interviewee said that creation of the Florida Keys National Marine Sanctuary will eventually result in a total ban on fishing, even though it is permitted today.

Interviewees felt that the increase in tourism and the relative ease of fishing with GPS caused overfishing by recreational fishermen (and limits were placed on them).

One stakeholder was of the opinion that in mid 1980s, the County's vision was to do away with the working waterfront and trailer parks, then upgrade housing and raise the tax base for infrastructure improvements (new schools, etc.).

Several interviewees believed that Key West has been "marketed to death" by the Tourist Development Council, which brought year-round tourism to the Keys, along with cruise ships and special events for slow weeks (Fantasy Fest, etc.). This is perceived to have been done in an attempt to attract wealthy tourists, not simply large numbers of tourists. This success spelled the end of the working waterfront.

### ***Recreational***

Stakeholders representing recreational marine-related industries have also witnessed a disappearing working waterfront, or one with significant negative changes and loss of dockage.

It is believed that redevelopment/condo conversions will have an influence on the waterfront as people are desirous to own a "piece of paradise." This will lead to the

loss of a historical seaport, Key West Bight, and other marinas, leading to commercialization such as that now seen on Duval Street.

Another respondent noted that, in addition to the Key West area, there have also been losses of marine-related industries from Key Largo to Islamorada [e.g., Hobo's Marina on Key Largo; Bass Pro Shops on Islamorada (took out dry storage facilities; now wet slips only used for short-term day-use trips); Campbell's Marina in Tavernier; and Lorelie Restaurant (previously a sponsor of the Islamorada Sailfish Tournament, has since been sold and is being converted to condominiums)].

### **Nongovernmental Organization**

When asked about changes in the working waterfront over time, one respondent from the NGO sector noted that water quality in the Keys used to be quite poor. Significant improvements have since been made in water quality throughout Monroe County.

As a whole, this group of stakeholders agreed with others that boating activity, in general, has changed. The once-predominant commercial fishing boats are disappearing, being supplanted by pleasure craft and tour boats. Moreover, vacant land, especially in Key West Harbor, was developed during the 1970s and '80s into large areas of shops for the tourist trade. The historic maritime traditions of Old Town Key West have been transplanted to Stock Island, but that fishing enclave is also now in jeopardy.

One participant felt that sport fishing and guide operations were "flat" because there is no place left to put any more boats. This stakeholder expressed the additional concern over vacation rentals, which are allowed in some areas of the County. These renters are frequently perceived as destroying both the natural resources of the Keys and the residential tranquility of some neighborhoods and communities.

Regarding changes brought about by redevelopment, one interviewee said that turning antiquated hotels and motels into condominiums (allowed by a recent ordinance) has the positive effect of making a transient use more permanent, while adding to the tax base. This respondent felt that the new condo dwellers will become vested residents of the community over time. For this reason, condo conversions were favored over resort developments that would cater to a more fleeting visitor population. Still, condo conversions will not adequately address the workforce housing issue, because this type of redevelopment does not carry with it the same percentage requirements for affordable units as does new development.

As to the working waterfront, selective redevelopment would be acceptable in these areas if the land use remained the same (e.g., no existing boatyards should become resorts). In contrast, another NGO representative said that redevelopment will result in the disappearance of the working waterfront, as areas become "totally gentrified."

There will be no one left to work in the water-dependent industries unless there are government subsidies (for housing, fuel, property tax).

### **Other Stakeholders (Developers, Realtors, Media, Citizens)**

This diverse set of interviewees noted that the shrimping industry seems to have all but disappeared over the last few decades. More recently, the greatest change has been gentrification, which is displacing marinas and trap storage areas. It was the general consensus of this group that Monroe County has experienced significant development since the 1970s.

## ***Major Industries in The Florida Keys***

### **Government**

Tourism is supported by many marine-related industries. A study conducted in the mid-1990s revealed that the Keys then served as host to approximately three million visitors per year who spent roughly \$1.2 billion. In addition, the data showed that \$50- to \$70-million per year were realized from the combined catches of spiny lobster, stone crab, and scale fish. Some interviewees pointed to the statewide economic impact from the County's commercial marine industries in terms of capital outlay and ongoing expenditure of dollars.

In general, these stakeholders recognize the value of the working waterfront to tourism and regard it as an asset. They also acknowledge the importance of recreational fishing for tourists, cultural related events, diving operations, and the coral reefs in the Florida Keys National Marine Sanctuary. They felt that charter boat operations are currently a significant industry in Key West.

One government respondent ranked the major industries in the following order: Architecture, Food, Water Sports, Ecotourism. This commentator noted that the Top 9 taxpayers are resort properties in addition to Bell South.

A positive impact of tourism has been its related effect on the ad valorem tax; without revenues generated from tourism, local residents would pay more in property taxes.

Tourism has been helped by the "live and let live" attitude of Keys' residents and because the area is perceived to be a safe destination in the United States. Tourism has undergone changes over time, as this market grew to be the mainstay industry. In the 1960s, there was a small budget derived from property taxes to support tourism. The industry was greatly invigorated by legislation in 1981 and the authorization of a two-cent bed tax, which has increased substantially in recent years.

As other interviewees discussed, tourism grew in importance to fill an economic void resulting after the Navy left Key West in the 1980s. In the mid 1990s, the Tourist



Development Council hired a professional director with an ambitious marketing strategy.

Tourism can be viewed as comprising three main categories:

1. Cultural-Historical-Architectural
2. Fishing
3. Dive Industry

Another interviewee, who represented a government agency, felt that the major industries in Monroe County were ranked accordingly:

1. Tourism
2. Recreational Fishing
3. Commercial Fishing
4. The Navy (Key West)
5. The Retiree Population
6. Water-related Sports

One commentator provided the following ranking of major industries in the Keys:

1. Tourism
2. Government/The Navy
3. Fishing

Yet another stakeholder said that commercial fishing was the most important industry in the past, but its value has been on the decline. Now recreational fishing is on the increase, but it still lags behind tourism in importance. The Navy is still a “big player” in the opinion of this respondent.

It was recognized that with respect to recreational fishing, marine facilities, boat ramps, and related supporting facilities and businesses are all critical to a thriving marine industry.

Finally, one government respondent noted that ecotourism is a developing and diversifying industry in Monroe County.

## **Marine Industries**

### ***Commercial***

As a group, these stakeholders were in agreement that tourism is now more important economically than commercial fishing. Interestingly, they are supportive of the recreational boating industry, since boat and trap storage are similar problems facing both industries, in addition to the problems of maintenance and repair of vessels and equipment.

The consensus was that commercial fishing is still an important economic engine in Monroe County, which is among the top 10 nationally in terms of fishing landings.

### ***Recreational***

This set of interviewees felt that all of the marine industries are equally important to the economy of the Keys (i.e., no specific industry was cited). Tourism may be the driver, but tourist attractions and destinations are different, depending on which area of Monroe County is being discussed. For example, the Upper Keys and Key West have similar tourist attractions; the Middle and Lower Keys have fewer tourist-related destinations. The retail trade was noted as being of special importance to the economy of Marathon.

According to one stakeholder, the marine and commercial fishing industries are the most important, while another said recreational fishing, guides, and charter boats are a large part of the tourist industry.

In general, those interviewed in this sector said that the primary reason people come to the Florida Keys is to enjoy recreational fishing or snorkeling and scuba diving.

## **Nongovernmental Organization**

Tourism is considered the number one industry in the Keys by this set of respondents, although one person said the recreational dive- and charter-boat industry was an “adjunct” to tourism. Commercial fishing ranked as the second major industry according to one NGO representative, but came in slightly lower in rank for another. The military and other government-sector employment ranked third, and boatyard operations were farther down on the list of major industries in Monroe County.

One interviewee commented that 60 percent of visitors to Monroe County are from other parts of Florida and states in the Southeast.

## **Other Stakeholders (Developers, Realtors, Media, Citizens)**

In general, those representing the various groups in this set of stakeholders are of the opinion that tourism is the number one industry in Monroe County, with the marine industry/commercial fishing ranked second, and military/government as the third most significant industry in the Keys.

## ***Key Problems Confronting the Marine Industries***

### **Government**

Future threats, according to government agency stakeholders, include the high cost of living, the conversion of affordable housing to accommodations for more transient residents, and wealthy seasonal visitors; i.e., “billionaires buying up millionaires.” The transient rentals of condominiums add little to the tax base. In addition, a decrease in tourist tax revenues could be a likely result of conversion of hotels to condos; this would also affect the Keys’ economy locally. Condo conversion has led to a decline in the work force, impacting marine industries. Other critical problems are perceived to include the clean water/storm water/sewage issue, growth control over land, and Everglades cleanup.

As affordable housing disappears, it costs the local residents more to obtain a variety of services. This has a spillover effect on the ability of Monroe County to provide high-quality services for tourists.

Time and time again, stakeholders related how redevelopment will have an effect on tourism, including recreational fishing and boating operations. The main problem is that soon there will be no place left for workers in these businesses to reside.

Redevelopment has also resulted in a loss of marine facilities and related support industries, such as repair shops with welding facilities. One commentator believed that there is now only one haul-out facility left in the entire Keys. These businesses are needed in addition to available boat slips.

### **Marine Industries**

#### ***Commercial***

Escalating land values were recognized as perhaps the greatest threat to the commercial fishing industry, as waterfront property owners abandon their marine-related, water-dependent businesses and sell their lands, which are often slated for redevelopment to condominiums or resort “destination” venues. There is a spillover effect from the loss of dockage due to redevelopment/condo conversions and that is a loss of employees for these marine-related businesses. Affordable housing is in short supply for this labor force. Skilled marine workers are in demand, but without adequate housing opportunities, the supply has been limited.

It should be noted that there was a marked division within this set of stakeholders, depending on whether or not they owned property zoned “commercial” as their primary residence and for equipment (mainly trap) storage (e.g., commercial fishing village special district). The independent, property-owning group of fishermen did not have to rely on outside facilities, such as fish houses or the FDOT rights-of-way for trap

storage. Those without property are facing losing their businesses if they are unable to find land to carry out their work.

A number of interviewees put some of the blame for their current situation on the tourism and marketing expenditures used to promote Stock Island, in particular.

Overregulation of commercial fishing was perceived as another cause of the demise of the working waterfront. With multiple layers of laws and regulations at the state and federal levels, in addition to the designation of the Florida Keys National Marine Sanctuary, regulation of the industry is seen as so restrictive that it threatens the future altogether. Some commentators felt that the impending listing of staghorn and elkhorn corals as endangered species would place even more regulatory limits on fishing when these corals are already receiving protection at present.

Some commentators remarked that the County wants to save the industry by regulating zoning on commercial fishing property by means of a moratorium. Some of these stakeholders felt that this will negatively impact the ability to consolidate commercial fishing operations.

Finally, several respondents noted that property owners bought property with specific uses in place. But the “rules” have been changing and the designation of “conditional use” places limits on what originally was permitted. This is widely perceived as unfair and un-American.

### ***Recreational***

This group of stakeholders has also experienced a disappearing working waterfront or one with significant negative changes and loss of dockage. This is the most serious problem to be confronted. They said that ad valorem taxes are increasing due to escalating land values and the marine-related industries are paying the highest commercial rate of tax. Placing limits on the allowable uses of property (i.e., no building/no slip changes) can be expected to result in even higher property values and therefore taxes.

These interviewees made the interesting observation that, in their opinion, the general public does not recognize the economic importance of marine industries or understand the implications of losing the working waterfront.

Other threats noted by recreational industry representatives include:

- Decline in availability of affordable housing units: The labor force is negatively impacted.

- Loss of customers: There has been a decrease in the commercial base and the number of boaters due to the facilities that have been lost. Boating residents are being displaced by seasonal visitors.
- Fear among those involved in the working waterfront: From landowners to fishermen, this fear has emerged due to the uncertainty of County action and plans.
- Lack of code enforcement: In some areas, this has been a problem with respect to seasonal/vacation rentals (of less than one-month duration).

### **Nongovernmental Organization**

Commentators with an NGO perspective are concerned about the environmental impact of recreational boaters. Visitors and those inhabiting the vacation rentals are perceived to be there to exploit the natural resources of the Keys, with little regard for the impact they are having.

One interviewee felt that the real estate lobby, especially in Marathon, is a growing threat. This person also remarked that the labor pool has declined, and with the loss of marine facilities, one now must take his or her boat elsewhere (to Fort Lauderdale, for example) for repairs and other servicing needs.

### **Other Stakeholders (Developers, Realtors, Media, Citizens)**

One commentator noted that government has actually been a problem because they have appeared to want to save the industry, but have taken little action in that regard.

A major problem is the redevelopment of dockage space to “dockominiums.”

### ***Forecast and Vision***

#### **Government**

Government representatives commented that if Stock Island goes the way of redevelopment, the commercial fishing industry will have no fallback place to relocate.

One commentator forecasts year-round tourism, not seasonal as it once was. Perhaps the Tourist Development Council has done too good a job. Ecotourism many need to be limited.

It is hoped that the Keys will be able to maintain and continue to provide a quality tourism experience; not “mass tourism.” Low-impact tourism is favored so as not to destroy the lifestyle of the Keys or impact other industries. The interviewees want to preserve the uniqueness of Monroe County in the first place – an archipelago surrounded by water, reefs, the natural environment and populated by residents such

as talented artists and those who fiercely guard their independence. Keys' residents give visitors a unique experience, showing that it is a community of diverse people. However, the Keys may lose this community spirit unless, over time, new residents become vested in the community and its many and varied resources.

Some commentators do not foresee an ability to mix development of upscale condos with marinas and boat yards, unless there are residential developments for fishermen.

Several government respondents envision the creation and effective implementation of a multiple-use management program to ensure a sustainable commercial fishing industry in Monroe County.

Other stakeholders envision a fishing industry that is sustainable for production, both for recreational and commercial fishermen, but mergers may be needed. Fishermen need dockage, storage for gear, and a means to sell fish.

## **Marine Industries**

### ***Commercial***

This group realizes a critical need for preservation of existing Stock Island property because there is "nowhere else to go" unlike years ago when commercial fishermen left the Key West Waterfront for Stock Island. Displacement now would be permanent and leave them without alternatives.

They believe the County will grandfather in marine industries, but not allow transfer of licenses. Part of saving liveaboards is saving the working waterfront and commercial fishing.

Locals are leaving the area and there will be no succession of the workforce. A generation is missing to take over as boat captains. They do not believe that a transfer of commercial fish houses will be allowed in the future.

### ***Recreational***

These respondents envision balanced development, taking the history of the community into account.

One interviewee was optimistic about efforts to preserve the working waterfront. Yet, another felt that both commercial and recreational fishing will be "dramatically decimated" to 10 percent of what they once were.

In general, these interviewees do not oppose development but they want the working waterfront protected.

One stakeholder also noted that affordable housing will become a moot point if service industries begin to disappear (e.g., declines in hotel occupancy).



## **Nongovernmental Organization**

Stakeholders with an NGO perspective expressed guarded optimism about the future of the working waterfront due to the “public will” now in favor of a sustainable marine industry. However, this public sentiment may fade in as little as two years. One respondent believed that existing marine businesses are not in jeopardy; nevertheless, if land uses change, marine-industry-related property owners may decide to “cash out.” If the working waterfront – i.e., “the fabric of the community” – does disappear, it would be “a real loss.”

“No net loss” of marine-related industries is this group’s vision, although the reality indicates less of a presence due to a decrease in the number of these businesses throughout the County. Public boat slips should be protected even in cases of condo conversions.

The interviewees agreed that effective enforcement of existing zoning and environmental laws and regulations would serve to protect current uses, such as the commercial fishing villages and special districts. Conditional use permits are seen as being flexible enough to allow reasonable changes.

Environmental education and an enforcement presence are viewed as “critical” to preserving existing resources. With respect to public water access and the availability of related facilities, the issue is finding the right balance of uses.

## **Other Stakeholders (Developers, Realtors, Media, Citizens)**

One interviewee said, “My thoughts for the future are my recollections from the past.”

Another felt that government subsidies will be used to preserve the working waterfront. There will be fish houses on the ground level and workforce housing upstairs. Mixed use zoning will be in place to enable different uses that are compatible with a viable working waterfront.

## **Scenarios**

In an effort to understand the role of the County and look toward the future, three different scenarios were vetted with respondents. The first scenario involved balancing the needs of the marine industries with the wishes of developers, a middle ground that would permit various types of development such as mixed use. Decisive action by the County would protect the marine-related and ecotourism industries while allowing selective development. A second scenario would preserve the marine industries at all costs because of the importance of the working waterfront to the Keys lifestyle. The County could use all measures, including zoning and land use regulations, to ensure the continuation of the marine-related industries. A third scenario would adopt a

laissez faire approach and permit the free market to intervene. It would limit the role of the County in securing the marine industry.

Each scenario had some support from stakeholders, but in general the consensus favored the first scenario, allowing for some development with decisive action by the County. Most respondents felt that the marine-related industries and working waterfront should be preserved as an integral part of life in the Keys.

## **Government**

Government stakeholders generally preferred Scenario 1, balancing needs without letting commercial fishing disappear such as has already occurred in Key West.

## **Marine Industries**

### ***Commercial***

Some of these respondents, in general, said that some help from the County is needed, but this should be weighed against the free market so that only the competitive survive (very independent in thinking).

Others favored Scenario 3 of status quo/laissez faire, although one person felt zoning was acceptable in residential areas with flexibility allowed in commercial areas.

Several others were in favor of simply being left alone and permitting multiple uses of property.

### ***Recreational***

This group favored Scenario 2, saying that government may have to take extreme measures to preserve property (including outright land purchase).

One stakeholder favored Scenario 1, but was not sure it would be successful.

## **Nongovernmental Organization**

The NGO representatives desired Scenario 2 – the working waterfront and marine industries should be preserved at all costs and “aggressively protected.” The County could buy property for marine uses with funding derived from special assessments or bond monies. Ecotourism could be expanded with education as a main objective.

## **Other Stakeholders (Developers, Realtors, Media, Citizens)**

Those interviewed in this group also felt that Scenario 2 was the best option and that the government should take a strong role in preserving the working waterfront and marine-related industries. Keys residents could be guided by the County to embrace a vision of Monroe County with a strong and viable working waterfront.

## ***Recommendations and Key Action Items***

### **Government**

There was a general consensus among government interviewees that there was a need to protect and improve public access to waterways. This can be achieved in part by adhering to existing zoning designations.

Land uses need to be balanced with zoning used effectively to achieve conservation goals. Blue- and green-belted could be used to protect water-dependent uses.

The County could use 4 cents of the bed tax (tourist impact tax) for affordable housing, as specified by law.

The government should support existing industries, not condo development.

Several interviewees said that there is political pressure from developers and commercial fishing interests need to “step up politically.”

Others thought that some public docks and trap storage areas could be in County ownership or the County could sell or lease property in a co-operative venture back to fishermen. The County could also purchase land, which could then be managed privately. Purchase of Development Rights, Transfer of Development Rights, negotiations, trust funds, land trusts, and Community Redevelopment Areas could all be explored as tools to help preserve the working waterfront.

### **Marine Industries**

#### ***Commercial***

Some of these stakeholders made the following recommendations:

- The focus should be on getting help from the County to procure land, set up cooperatives or some partnerships with industry.
- The County should remove the moratorium to permit mergers/consolidations.
- They need cooperation from the County to permit and allow commercial fishing upgrades to infrastructure.
- Flexibility in use of land is needed so that owners can subsidize commercial fishing with other uses (condos, etc.).
- Commercial fishing should be treated like family farms with respect to property tax subsidies.

Others do not want the government as a partner and are strongly opposed to this concept. They simply want to be left alone, not hindered, so profits can be realized from commercial fishing. But practical solutions are needed for the commercial fishing industry to preserve the lifestyle.

Deregulation at the state and federal level would give industry time to adjust to all the changes.

The loss of the workforce should be examined in a separate study.

### ***Recreational***

Stakeholders in this group recommended the following actions:

- The County should pursue the “no net loss” goal to protect displaced marine-related industries.
- The pace of development should be slowed down at the state or local level.
- Key historical areas should be identified to preserve critical working waterfronts, and water access areas should be maintained and protected.
- Preserve the working waterfront as a viable and active part of community.
- Innovative funding mechanisms could be the key to help marine-related industries (e.g., the 2005 Working Waterfronts legislation, Purchase of Development Rights, Transfer of Development Rights, tax deferrals, tax credits/land use plan for marine uses, subsidies).
- Adopt the policy of “no net loss” to ensure no loss of public access or dockage.

In addition, one stakeholder thought that a boating use study should be conducted to determine the percentage of residents who take their boats out, when they go, etc.

### **Nongovernmental Organization**

These stakeholders said the marine industry should be preserved at all costs. They would recommend tax breaks for employers in marine-industry related businesses. Other land use preservation tools could be employed, such as conservation easements and restrictive covenants.

Good science is needed to protect certain species. One commentator said the federal government was doing “a good job” in this area.

The County may want to purchase more waterfront property for public access purposes.

### **Other Stakeholders (Developers, Realtors, Media, Citizens)**

One participant in this category recommended that the County could bring more tourists to Stock Island. This would be preferable to an increase in part-time property owners.

Another recommendation was that the County could exercise its regulatory authority without infringing on property rights.

Another respondent recommended government subsidies to help preserve the working waterfront.

Finally, one stakeholder thought that waterfront destinations should be made more accessible to the public. A mix of uses, such as venues in New England along the working waterfront, could be employed to attract residents and visitors alike.

## **Section 5: Similar Challenges Facing Other Waterfront Communities**

### ***Senate Report and the New Legislation***

Responding to the growing perception that public water access is shrinking, the Committee on Community Affairs of the Florida Senate compiled the *Working Waterfronts* report, which was released in November 2004.<sup>62</sup> This study posited that public access to boat ramps and marinas may be diminishing not only because increases in statewide vessel registrations have outpaced the capacity to moor and launch boats, but also because evidence suggests that conversions from public to private use of both recreational and commercial-fishing working waterfronts have contributed to the loss of access. Committee recommendations led to passage of the Florida Waterway and Waterfront Improvement Act of 2005.<sup>63</sup>

The report explained that this is not a new trend, citing the 1983 Governor's Blue Ribbon Marina Committee, which found that waterfront throughout the State of Florida was being converted to private use on an increasing basis, thus reducing opportunities for public access. In addition, a 1995 study sponsored by the state's Coastal Management Program noted that a number of Florida's working waterfronts were on the decline. Underlying factors included demands for residential housing along the desirable waterfront, the constitutional fishing net ban of 1994, and other market forces (e.g., seafood imports) and trends affecting the small-scale commercial fishing industry (e.g., additional regulatory impediments).<sup>64</sup>

### ***Extent of Losses Statewide***

To document the conversion of marine facilities and loss of public access, an inventory of facilities was undertaken and presented in the *Working Waterfronts* report. This was accompanied by the results of an information-gathering survey of local governments and boating industry representatives.<sup>65</sup> The survey revealed that "the public's relative access has declined due to the increase in the number of registered boats in the state.

---

<sup>57</sup> *Working Waterfronts*. Florida Senate Committee on Community Affairs. Interim Summary Report 2005-122 (2004). Hereinafter referred to as "Senate Report."

<sup>63</sup> Fla. Stat. §§ 342.03 *et seq.*

<sup>64</sup> *Profile of Working Waterfronts*. Florida Atlantic University/Florida International University Joint Center for Environmental and Urban Problems (now the Catanese Center for Urban and Environmental Solutions). (1995) p. v.

<sup>65</sup> It was acknowledged, however, that a comprehensive statewide inventory of commercial and recreational working waterfronts was not conducted. Currently, an additional statewide boating access study with economic analysis and Lee County pilot project is underway for the Florida Fish and Wildlife Conservation Commission to provide further documentation related to public water access issues.



This is especially apparent in Florida's urban counties."<sup>66</sup> The problem is exacerbated in those counties experiencing an increase in conversions of working waterfront properties to residential uses, especially since many public marinas also have boat ramps.<sup>67</sup> Survey respondents from 10 counties<sup>68</sup> and 10 municipalities<sup>69</sup> stated that within the last five years commercial-fishing working waterfronts in their locales have been converted to public or private marinas and dry storage facilities, and this trend is continuing. Moreover, 13 counties<sup>70</sup> and 22 municipalities<sup>71</sup> reported that within the past five years, they have also been losing recreational working waterfronts.

According to the Florida Fish and Wildlife Conservation Commission, approximately 85 % of registered vessels in Florida are kept on trailers and launched from boat ramps. Perhaps the greatest statewide need is for boat ramps with saltwater access.<sup>72</sup> Local governments simply cannot find affordable land for new access points. In some areas, the shortage has become so critical that the phrase "ramp rage" has been coined to describe the often volatile scenes that have been known to erupt between boaters at ramps with inadequate launching capacity or parking for vehicles and trailers.<sup>73</sup>

### ***Florida Counties with Common Needs***

Monroe is among other counties in Florida facing similar challenges with respect to both commercial and recreational working waterfronts. It should also be noted that many of Florida's coastal counties need to accommodate the substantial number of vessels from other states and foreign countries that visit the state each year. As a consequence, it is apparent that the present inventory of waterfront facilities is inadequate to meet the current demand.

For example, nearby Miami-Dade County has more than 50,000 registered boats with only 56 ramps at six marinas to accommodate these vessels.<sup>74</sup> One ongoing initiative

---

<sup>66</sup> Senate Report, p. 4.

<sup>67</sup> *Id.* at fn. 20.

<sup>68</sup> *Id.* at fn. 28, citing Broward, Citrus, Dixie, Franklin, Lee, Monroe, Pasco, Sarasota, and Walton.

<sup>69</sup> *Id.* at fn. 29, citing Apalachicola (Franklin), Clearwater (Pinellas), Madeira Beach (Pinellas), Destin (Okaloosa), Miami (Miami-Dade), Pensacola (Escambia), Port Richey (Pasco), Riviera Beach (Pam Beach), St. Augustine (St. Johns), and Sarasota (Sarasota).

<sup>70</sup> *Id.* at fn. 34, citing Brevard, Broward, Citrus, Dixie, Escambia, Franklin, Jefferson, Lee, Levy, Monroe, Sarasota, Taylor, and Walton.

<sup>71</sup> *Id.* at fn. 35, citing Apalachicola (Franklin), Clearwater (Pinellas), Cocoa (Brevard), Crystal River, currently being considered (Citrus), Destin (Okaloosa), Freeport (Walton), Hallandale (Broward), Holmes Beach (Manatee), Jacksonville (Duval), Longboat Key (Sarasota-Manatee), Marineland (St. Johns), Madeira Beach (Pinellas), Miami (Miami-Dade), Oldsmar (Pinellas), Palmetto (Manatee), Palmetto (Manatee), Pensacola (Escambia), Punta Gorda (Charlotte), Riviera Beach (Palm Beach), Sarasota (Sarasota), Shalimar (Okaloosa), South Pasadena (Pinellas), and Tampa (Hillsborough).

<sup>72</sup> "No room at the ramp" available online at

[http://www.palmbeachpost.com/recreation/content/entertainment/recreation/outdoors/boating/boat\\_ramps.html](http://www.palmbeachpost.com/recreation/content/entertainment/recreation/outdoors/boating/boat_ramps.html) (July 3, 2005).

<sup>73</sup> "Ramp rage at Dade marinas stirs waves," Miami Herald, July 4, 2004, sec. 1B Metro & State.

<sup>74</sup> "Ramp rage at Dade marinas stirs waves," Miami Herald, July 4, 2004, sec. 1B Metro & State.

focuses on commerce and advancing the quality of life on the Miami River. In 1998 the Miami River Commission<sup>75</sup> was formed to serve as the official organization charged with improving the river and surrounding area. The Commission actively seeks the participation of a wide range of stakeholders, such as shipping interests, marina owners and operators, recreational boaters, political jurisdictions, and neighborhood, civic, and environmental groups.

Elsewhere in South Florida, Broward County has 38 boat ramp locations (but 16 of these are located in the Everglades) with 1,301 parking spaces for more than 36,000 boats on trailers. The Marine Industries Association of South Florida (MIASF) has recently reported a loss of 1,800 slips in Broward County alone.<sup>76</sup> Broward's marine industry is similar to that of Monroe County because of the extensive linkages with non-marine businesses such as tourism, as well as being a significant contributor to the area's lifestyle, culture, history, and ambience.<sup>77</sup> MIASF sponsored the development of a Marine Master Plan, completed in 2001, which focused on several cities in Broward with marine-related industries on the waterfront.<sup>78</sup> A master plan committee has been working to implement plan recommendations, such as finding suitable sites for expansion, redevelopment, or new marine facilities. In addition, the County is completing a Boat Facility Siting Element, a component of the Manatee Protection Plan (MPP), to guide this development in the future. When finalized, the facility siting element and MPP will become part of the County's Comprehensive Land Use Plan.

Palm Beach County has more than 43,000 recreational boats and 43 boat ramps at 13 parks with saltwater access. This totals a combined 560 parking spaces for an estimated 36,000 "trailerable" vessels. To address public water access needs voters in Palm Beach passed a \$50 million Waterfront Access and Preservation Bond referendum in November 2004. It is anticipated that the county may buy or trade for the development rights of private marina owners. However, due to escalating land prices, it has been determined that these monies may be best spent on improving public parks to provide more access for recreational boaters. Building marinas and increasing the number of parking spaces at county boat ramps are two options under consideration.

In addition, the Riviera Beach Community Redevelopment Agency of the City of Riviera Beach has a plan in place for a complete waterfront overhaul to include expansion of existing boat repair yards, yacht sales, and other marine-related businesses. A new marine commercial zone will consolidate businesses and will be "jointly marketed as the most concentrated and comprehensive marine trade area in

---

<sup>75</sup> <http://www.miamirivercommission.org>.

<sup>76</sup> Letter (dated May 24, 2005) to Roger Desjarlais, Broward County Administrator, from Frank Herhold and Susan Engle (representing MIASF), pp. 1-2. "Our marinas are being turned into high-end residential developments with the slips either being sold (yachtminiums) or reserved for the condominium owners thereby reducing public access to our waterways."

<sup>77</sup> *Id.*, p. 1.

<sup>78</sup> Florida Atlantic University, Catanese Center for Urban and Environmental Solutions. (2001). Marine Master Plan.

Florida.”<sup>79</sup> It is anticipated that both boating and tourism (fishing, diving) destinations will be created, although the number of desired boat slips may be dependent upon the outcome of the Palm Beach County Manatee Protection Planning process now in progress.

Florida’s Treasure Coast is also experiencing an increase in vessel registrations, with nearly 17,000 in Martin County and almost 13,000 in St. Lucie County, for example.

Martin and St. Lucie each have seven boat launching facilities with saltwater access. In response, Martin County has recently developed a "no net loss" policy to protect existing marinas and land zoned for commercial waterfront use. If marina land converts to a residential use (e.g., condominiums), the developer must provide comparable waterfront land nearby to replace the lost marina.<sup>80</sup> On Florida’s West Coast, the situation is much the same. The more than 47,000 boat owners in Lee County have access to only 13 public ramps. To help address this shortage in boat ramps, Lee County officials are looking into the feasibility of purchasing a popular Pine Island marina and making it a public boat launching facility. A fisherman’s cooperative, which has been in existence for 30 years, owns the marina, which functioned as a fish house as early as the 1940s.<sup>81</sup> Manatee and Sarasota counties combined have 24 ramps for roughly 40,000 vessels.<sup>82</sup> Pinellas County has convened a Boating Access Task Force, and voters in Charlotte County have approved a sales tax to be used for the acquisition of land suitable for new marina development.<sup>83</sup>

Citing one last example from another part of the state, the City of Jacksonville acknowledged the need for and value of its working waterfront and marine industries when it approved a rezoning to allow a condominium at the historic Ortega River Boat Yard with land set aside for boat repairs to continue.<sup>84</sup>

---

<sup>79</sup> *Id.* at p. 16.

<sup>80</sup> See “Protect waterfront access in Stuart, Martin County” (Aug. 14, 2005) available online at [http://www.palmbeachpost.com/opinion/content/opinion/epaper/2005/08/14/m2e\\_wayne\\_edit\\_0814.html](http://www.palmbeachpost.com/opinion/content/opinion/epaper/2005/08/14/m2e_wayne_edit_0814.html).

<sup>81</sup> “County pursues purchase of marina” available online at <http://www.news-press.com/apps/pbcs.dll/article?AID=2005508240467> (Aug. 24, 2005).

<sup>82</sup> “No room at the ramp” available online at [http://www.palmbeachpost.com/recreation/content/entertainment/recreation/outdoors/boating/boat\\_ramps.html](http://www.palmbeachpost.com/recreation/content/entertainment/recreation/outdoors/boating/boat_ramps.html) (July 3, 2005).

<sup>83</sup> “Boaters lose ground,” available online at [http://www.sptimes.com/2005/08/05/news\\_pf/Gulfandbay/Boaters\\_lose\\_ground.shtml](http://www.sptimes.com/2005/08/05/news_pf/Gulfandbay/Boaters_lose_ground.shtml).

<sup>84</sup> “Panel OKs boatyard plan” available online at [http://www.jacksonville.com/tu-online/stories/040704/met\\_15285142.shtml](http://www.jacksonville.com/tu-online/stories/040704/met_15285142.shtml).

## ***Waterfront Preservation in Other States***

Florida is among other states facing losses of its commercial-fishing and recreational working waterfront.<sup>85</sup> Yet, some communities are making a comeback in a number of coastal states. Ongoing research being conducted as part of this study has indicated that several communities in New England, including Connecticut, Maine, Massachusetts, and Rhode Island, have acknowledged the many values of their working waterfronts and have taken an active role in preserving them. Places such as Norwalk and Mystic Seaport (CT), Portland (ME; Cundy's Harbor and Yarmouth, in particular), and the Massachusetts towns of Boston, Edgartown, Marblehead, and New Bedford are noteworthy for their initiative in preserving their working waterfronts, as is Little Compton (RI). Local governments in other states, such as Oregon, Washington, and South Carolina, have also taken the lead on adopting policies and regulations aimed at waterfront preservation. Examples include Hilton Head (SC) and the innovative programs in Washington State, such as Sea Grant and efforts aimed at the revitalization of urban ports in that state.

---

<sup>85</sup> Mention must be made of the devastation caused by Hurricane Katrina in 2005. Working waterfront losses along the Gulf Coast of the United States have yet to be assessed as of this writing, but can be expected to be substantial due to the catastrophic impact of this huge storm. Destruction of Gulf oil operations and at the Port of New Orleans, as well as other Gulf ports, will have far-reaching consequences throughout the United States and its international trade partners. Katrina also resulted in damage to the Florida Keys. Marathon sustained several millions of dollars worth of tornadic losses alone. Heavy rains and high winds caused flooding and downed trees, among other impacts, based on initial reports from Key West to Tavernier. See, e.g., "Debris stacking up" available online at <http://www.kenoter.com/articles/2005/08/31/news/news05.txt> (Aug. 31, 2005).