

1 *Pinellas County Today - Cities, Small Towns and Suburbs*

Pinellas is entering the new century as a major urban county of around 944,000 permanent residents. Add to this number an annual influx of roughly 5 million visitors and tourists, and almost 80,000 seasonal residents, and it becomes clear how completely this small area of only 280 square miles has been transformed since 1900 when the population stood at only 2,572 people. But in this urban transformation the individual small towns and villages that were settled in the late 19th or early 20th centuries have survived either as separate governmental entities or as distinct communities that have retained the name by which they were identified with earlier in the century. **Figure 1** shows the location of the numerous small settlements that were scattered throughout Pinellas County in 1913. Most of these small towns and villages have incorporated, while the remainders continue as distinct communities within a municipality or in the unincorporated area. Also note the importance of the railroads as transportation corridors linking these communities together.

Today, Pinellas County contains twenty-four municipalities ranging in population from St. Petersburg (254,225 residents) to Belleair Shore (71 residents). Their locations are shown in **Figure 2**. In addition, the unincorporated area (with 280,487 residents) includes such historic communities as Ozona, Old Palm Harbor (formerly known as Sutherland), Lealman, Dansville, and Crystal Beach, as well as several unincorporated communities that largely came into existence during the past thirty to forty years. A partial list of these latter communities includes East Lake Tarpon, Greater Palm Harbor, Greater Seminole, Feather Sound, and Tierra Verde, all of which have become recognized as distinct communities in their own right. Pinellas County, though small in size, has been blessed with a variety of urban environments. There are large cities such as St. Petersburg and Clearwater, communities that retain their small town feel and connections with their historic roots, barrier island communities, and areas having a more suburban character.¹ It may be that this mix of cities, small towns, and suburban lifestyles on a beautiful peninsula in subtropical Florida are what will distinguish Pinellas County from other urban counties around the nation. This diversity of urban environments provides people with a choice of lifestyles. Retaining and enhancing these distinctive community characteristics will provide a significant challenge, as well as enormous benefits, to the citizens of Pinellas County.

To appreciate this existing urban pattern and how it came about, it is important to understand the role of history in the development of Pinellas County. A brief history of urban development in Pinellas County is provided as **Appendix A** at the end of this report.

FIGURE 1
Communities and Rail Lines in Pinellas County, Florida 1913

FIGURE 2
Municipalities and Unincorporated Areas in Pinellas County
November 2001

Pinellas County will be the first county within Florida to achieve buildout. Today only four percent of the County consists of vacant developable land; as recently as 1989 the figure was 15 percent, and in 2008, the figure was slightly more than 4 percent. **Table 1** compares how land is used in Pinellas County in the Year 2008 with how it was used in 1989 and 2000. When looking at current land use patterns, most of the remaining vacant property suitable for development is comprised of small tracts of land distributed throughout the existing urban area. **Figure 3** shows the location of all developable vacant tracts of land five acres or larger in April 2008. Until recently much of this vacant land was located north of Curlew Road, but the rapid growth of north

Pinellas County has exhausted much of this vacant acreage. As a result, a substantial portion of the County's remaining vacant land is now located in the Gateway/Mid-Pinellas Area where I-275, Ulmerton Road, Gandy Boulevard, U.S. Highway 19, and 49th Street converge. This area has been planned since the 1970s to serve as the County's major employment center and contains more than 60 percent of the planned industrial acreage in Pinellas. In addition, roughly 23 percent of the vacant acreage in the County is located in the Gateway/Mid-Pinellas Area ensuring that a significant portion of the County's employment growth in the next few years will occur in the mid-county area.

TABLE 1
Existing Land Use in Pinellas County, Florida –1989, 2000 & 2008

Existing Land Use Categories	1989		2000		2008	
	Category Acreage	Category Percent	Category Acreage	Category ¹ Percent	Category Acreage	Category ¹ Percent
Single Family	46,024	25.69%	51,537	28.67%	53,016	29.49%
Mobile Home	5,720	3.19%	5,548	3.09%	4,914	2.73%
Duplex-Triplex	1,589	0.89%	1,576	0.88%	1,547	0.86%
Multi-Family	8,836	4.93%	10,374	5.77%	10,708	5.96%
Commercial	9,331	5.21%	10,369	5.77%	10,842	6.03%
Industrial	4,449	2.48%	5,667	3.15%	5,176	2.88%
Public/Semi-Public	11,980	6.69%	12,452	6.93%	13,207	7.35%
Agricultural	2,877	1.61%	1,522	0.85%	1,156	0.64%
Recreation and Open Space	12,810	7.15%	13,928	7.75%	14,242	7.92%
Vacant Land	27,234	15.20%	11,338	6.31%	7,567	4.21%
Conservation/Preservation	12,938	7.22%	21,584	12.01%	21,358	11.88%
Marinas	347	0.19%	215	0.12%	250	0.14%
Total Net Acreage ²	148,878.9*	80.46%	146,111*	81.27%	143,981*	80.08%
Gross Acreage	179,130.10		179,789.27		179,789.27	

*Differences in total acreage numbers are attributed to variations in data collection methods.

Source: Pinellas County Planning Department, Fall 1988, 2000, and February 2008.

¹ Existing land use category acreage as a percentage of total gross acreage in the County.

² Net acreage does not include public rights-of-way.

FIGURE 3
Vacant Parcel of Land 5 Acres or Larger
In Pinellas County Florida
January 2003

The contribution that a specific type of land use makes to the County's tax base is not always proportionate to its percentage composition of the County's total land area. **Table 2** shows not only how Pinellas County's tax base has changed in the seventeen years from 1990 to 2007, but also the relative contribution that each existing land use has made to the overall tax base. For example, while single-family residential land use comprised more than 29 percent of the County's net acreage in the Year 2008, it represented 45 percent of the real property taxable value. Similarly, commercial and industrial land uses accounted for 8.8 percent of the County's net acreage in 2000, yet represented 21 percent of the taxable value. Other existing land use categories (e.g. public/semi-public and mobile homes), however, made a contribution to the tax base that was smaller than their percentage of the County's land area. **Table 2** makes it clear that residential development represented by far the most significant component of the County's tax base – i.e. 74 percent in the Year 2007 – while comprising 39.04 percent of the County's net acreage. In fact, residential development's contribution to the tax base increased from 59 percent to 74 percent from 1990 to 2007. A similar disproportionate contribution to the tax base is observed for commercial and industrial properties, which represented 21 percent of the tax base, yet comprised only 8.8 percent of the land area.

TABLE 2
Real Property & Tangible Personal Taxable Value by Land Use Categories,
Pinellas County, Florida¹

LAND USE CATEGORIES	1990		1995		2000		2007	
	Taxable Value (x 000's)	% of Total	Taxable Value (x 000's)	% of Total	Taxable Value (x 000's)	% of Total	Taxable Value (x 000's)	% of Total
Single-Family Residential	\$10,911,153	38%	\$12,717,974	41%	\$16,790,510	43%	\$33,776,340	45%
Mobile Homes	46,656	<1%	49,595	<1%	220,486	1%	745,787	1%
Multi-Family, Condominiums, & Cooperatives	6,061,109	21%	6,449,238	21%	7,578,967	20%	21,194,810	28%
Retirement Homes and Miscellaneous Residential	22,257	<1%	14,916	<1%	14,312	<1%	25,602	<1%
Improved Commercial/ Industrial	6,446,031	22%	6,372,217	20%	7,759,134	20%	11,165,436	15%
Improved Commercial/ Industrial ² (Tangible Personal Property)	3,082,330	11%	3,592,487	12%	4,595,983	12%	4,583,996	6%
Public/Semi- Public (Institutional and Government)	464,235	2%	562,901	2%	638,131	2%	881,595	1%
Agricultural	27,341	<1%	15,608	<1%	14,030	<1%	13,437	<1%
Vacant (Residential, Commercial, and Industrial)	1,586,145	6%	1,223,939	4%	1,137,682	3%	2,359,373	3%
Miscellaneous, Leasehold Interests	211,007	1%	174,080	1%	182,904	1%	277,464	<1%
Non-Agricultural Acreage	184,881	1%	56,829	<1%	28,274	<1%	25,603	<1%
TOTAL	\$29,043,145		\$31,229,784		\$38,960,413		\$75,049,443	
			+7.5% since 1990		24.8% since 1995 +34.1% since 1990		+93% since 2000 +140% since 1995 +158% since 1990	

Source: Pinellas County Property Appraiser's Office, 1990-2007.

¹ This table considers real property taxable values, which includes land, building, and improvements to the land. The taxable value of tangible personal property is also included in this table. Tangible personal property includes furniture, fixtures, and equipment located in businesses and rental property.

² Tangible personal property is primarily attributed to commercial and industrial land uses. Consequently, this table places the entire taxable value for tangible personal property within the Improved Commercial and Industrial land use category.

Pinellas County's economy has developed in response to numerous influences that are briefly described in **Appendix A** at the end of this element. **Table 3** identifies the amount of personal income that is derived from earnings obtained from one's place of work. It is clear from this table that the services industry is the largest sector of the County's economy, and that between 1993 and 2005 earnings growth was greatest in the services; finance, insurance and real estate; and government and government enterprises sectors. The overall earnings growth for this five-year period was 49.3 percent. Another important segment of the local economy is the substantial transfer payments to individuals, which is in large measure due to the County's retirees. In 1996, these transfer payments amounted to \$4.74 billion. While not listed as a separate industry in the information provided by the U.S. Department of Commerce, tourism continues to be Pinellas County's largest industry and has made a significant contribution to the growth in personal income among the various industry sectors identified in **Table 3**.

TABLE 3 Personal Income in Pinellas County, Florida Derived from Earnings by Place of Work				
Earnings by Industry	1993*	2005*	Change in Earnings 1993-2005	% Change 1993-2000
Services	3.90	10.29	6.39	62.1
Manufacturing	1.62	2.39	0.77	32.2
Government & Gov't Enterprises	1.57	2.65	1.08	40.8
Retail Trade	1.49	1.9	0.4	21.6
Finance, Insurance, & Real Estate	1.04	2.37	1.33	56.1
Wholesale Trade	0.62	1.09	0.47	43.1
Construction	0.61	1.35	0.74	54.8
Transportation/Public Utilities	0.52	0.4	(-0.12)	(-30)
Agricultural Services & Fishing & Mining	0.08	0.16	0.08	50
Total Earnings by Place of Work	11.45	22.6	11.14	49.3

*Numbers are in the billions of dollars

Source: Bureau of Economic Analysis, 2008.

The increased number and variety of job opportunities has caused a shift in local demographics as the County has become a more attractive location for younger people. Once thought of as a retirement haven, Pinellas County during the 1980's saw 72 percent of its population growth occur among those aged 25 to 44.ⁱⁱ One result was a decrease in the County's median age by almost 4 years, while at the state and national levels the median age increased during the decade. During the 1990's, Pinellas County's median age inched up slightly from 42.1 to 43.0 years of age, despite a reduction in the number of residents aged 65 and older and an increase in the number of school-age children. This slight increase in the

median age can be attributed to the fact that 76 percent of the population growth during the 1990's occurred among those between the ages of 45 to 64. According to the Bay Area Apartment Association, in 2006, the median age in Pinellas County was 44.4. This figure again represents a significant increase in the population between the ages of 45 to 64, which was 24.4% of the population in 2000 and 28.2% of the total population in 2006. From 2000 to 2006, Pinellas County experienced declining population in the following age groups: 25 to 34 years; 35 to 44 years; 65 to 74 years; and 75 years and over. All other age groups increased in size. The ramifications of a younger population include increased demand for such things as classroom space and active recreation facilities, which have a direct impact on funding and program decisions by the School Board, local governments, and other service providers.

With such a small percentage of the County available as vacant developable land, one might be tempted to conclude that the peninsula is completely developed. Fortunately, on a county-wide basis, almost one-fifth of Pinellas County (approximately 38,200 acres) is set aside for parks, open space, natural areas, and recreational facilities. This has been achieved through a combination of private investment in recreational amenities such as golf courses and subdivision recreational facilities, public investments in park development and acquiring environmentally sensitive lands and parkland, and governmental regulations protecting natural resources such as wetlands. A key component of this countywide effort has been aggressive efforts by the Board of County Commissioners to protect the environmental integrity of the major ecosystems (i.e. pine flatwoods and wetland systems) and the regional wellfield located in the East Lake Area in northeastern Pinellas County. As a result, almost 52 percent of the open space in the County is located here. However, as **Figure 4** clearly illustrates, recreational facilities, parks, open space and natural areas are distributed throughout the County.

Much of the environmentally sensitive lands and parkland in county ownership is the result of a successful land acquisition program begun in the early 1970s. In response to the dramatic growth that occurred following the end of World War II, the Red Flag Charrette of Pinellas County was conducted in 1972 to develop recommendations on protecting the County's natural resources and ensuring that there would be adequate open space and parkland as the County continued to grow. One of the recommendations was a proposed one mil increase in ad valorem taxes for two years in Pinellas County to raise funds to acquire public parkland and areas to be set aside as environmentally-sensitive lands. The citizens and the County's leaders had seen how the development of coastal areas and upland forests and wetlands was becoming too costly in terms of lost green space, dysfunctional natural systems, and the loss of the natural beauty that distinguished the Pinellas peninsula from other areas. The voters of Pinellas County passed this referendum in 1972, which clearly showed that the residents of Pinellas County cared about what their community would look like in the future. Many of them (in 1970, 28.3% according to the U.S. Census) had only moved to the area within the previous ten years, and yet the referendum was approved by 67% of the voters, demonstrating their support for preserving areas of natural beauty in the rapidly growing county.ⁱⁱⁱ This strong support for preserving the natural environment was exhibited again in 1984, 1986, 1989, and 1997 when citizens of Pinellas County voted to tax themselves to continue acquiring endangered environmental lands and open space.

This interest in environmental stewardship was also evident at the state and national levels, and resulted in a host of programs and regulations at the federal, state, and local levels to ameliorate the impact of development on natural resources. Regulations protecting wetlands,

water and air quality, the marine environment, and other natural resources were put into effect in the 1970s and refined in the following decades. Development in Pinellas County since the implementation of these regulatory programs has been considerably more compatible with the natural environment than what had occurred in prior decades. It is no coincidence that the concentrations of environmentally sensitive lands and open space seen in **Figure 4** can be closely correlated with those areas of the County that have developed in the last three decades.

By far, the largest percentage of the County's area is devoted to single-family housing. Over twenty-nine percent (or 53,016 acres) of the peninsula is comprised of residential neighborhoods consisting of detached houses located on individual lots. Mobile homes also represent an important component of the housing stock in Pinellas County – the more than 47,000 mobile home units comprise more than 9 percent of the total dwelling units countywide. The preponderance of land committed to single-family housing and mobile homes is largely responsible for the low-density look of much of the peninsula. This is not to downplay the importance of multi-family housing; although representing only 6 percent of the County's land area, multi-family housing accounts for 34 percent of all housing units in Pinellas County. This form of housing appears to be almost randomly dispersed throughout the County, occurring along or near major roadways, on the barrier islands, and along certain sections of the coastline. Interestingly, new multi-family housing is being introduced into the downtown areas of cities such as St. Petersburg and Dunedin. **Table 4** summarizes information on the number of different types of dwelling units throughout Pinellas County in 2000 and in 2008.

TABLE 4
Number of Dwelling Units by Type in Pinellas County, Florida

Type of Dwelling Unit	2000		2008	
	Number of Units	Percent of Total	Number of Units	Percent of Total
Single-family Detached	232,528	48.07%	240,265	48.38%
Single-family Attached*	N/A	N/A	18,550	3.74%
Mobile Home	56,456	11.67%	47,072	9.48%
Duplex-Triplex	19,698	4.07%	19,181	3.86%
Multi-family	174,045	35.98%	170,663	34.37%
Above Office or Commercial	967	0.20%	842	0.17%
Total Units	483,705	100.00%	496,573	100.00%

*In 2000, single-family attached units were included in the total count of multi-family units.

Source: Pinellas County Planning Department, 2008.

The buildings where people shop, work, and obtain services are primarily located along the County's major roadways. The resulting linear commercial corridors were developed in response to the primary mode of transportation – the automobile, which unfortunately in some locations has resulted in nondescript landscapes that do not represent any particular community history or character. In this regard, development in Pinellas County followed the pattern that came to dominate, with few exceptions, the newer urban landscapes across the country. It was a practical response to the increased mobility provided by the automobile, and these strip commercial areas are often the economic backbone of the community. Access on foot or bicycle, however, is often rendered impractical because of a lack of sidewalks, safe bicycle routes, etc. Alternatives to the strip commercialization of the road corridors were the development of large, master planned office and industrial parks, and regional malls. While good road access is still important, office and industrial development within these master planned projects usually occurs in a landscaped setting where access for individual businesses within the campus is usually provided internal to the project rather than directly from the public roadway. The regional malls, meanwhile, superseded the downtown commercial districts - characterized by a large number of individual business and property owners - with a centrally owned and managed alternative that provided shoppers with predictability, security, and a strategically determined mix of stores. This overall development pattern, heavily influenced by the automobile, resulted in the dispersal of jobs and services around the County, rather than their concentration in a few employment centers such as downtown areas. This dispersal of jobs, in conjunction with the low residential densities found in much of the County, has not proven conducive to supporting public transit.

In response to the tremendous growth occurring in Pinellas County, it was necessary to construct new roads in areas of the county that were rapidly urbanizing. It became increasingly evident during this time that these new roads generated a typical land development pattern characterized by retail and service uses and higher dwelling unit densities along the road corridor. This resultant development pattern soon overwhelmed the roadway's operating capacity and at the same time often severely degraded scenic resources along the roadway. Reflecting the national concern of the early 1960s regarding the appearance of road corridors and the need to protect the public's investment in these expensive transportation facilities, Pinellas County established its scenic/non-commercial corridor program in 1964. The scenic/non-commercial corridor designation was established to protect the traffic-carrying capacity and the aesthetic qualities of roadways considered most important in terms of traffic circulation and scenic value. **Figure 5** identifies those county and state roadways that have been designated as scenic/non-commercial corridors in Pinellas County. These designated corridors are protected by policies and regulations that restrict nonresidential development, encourage lower density residential development, control off-premise signs, and encourage additional landscaping along the roadway.

FIGURE 4
Pinellas County, Florida
RECREATION AND OPEN SPACE MAP
April 2008

FIGURE 5
Scenic/Non-Commercial Corridors as Designated
by the Pinellas County Board of County Commissioners

Figure 5 also includes those additional roadways that are identified on the countywide Future Land Use Plan as scenic/non-commercial corridors, as well as those roads, bridges, and causeways meriting special recognition for the scenic vistas they provide, especially of the waters and shoreline encompassing much of the County. Of special note is the main north/south roadway corridor along the County's barrier islands. Called Gulf Boulevard over much of its length, this corridor provides the only direct access to most of the County's beaches, tourist and seasonal accommodations, and attendant retail and service establishments. Pinellas County and the barrier island communities have identified the beautification of Gulf Boulevard as a key project for consolidating Pinellas County's position as a major competitor in the tourism industry. Pinellas County and the barrier island communities are moving forward in a joint venture to beautify Gulf Boulevard, in recognition of the significant contribution scenic improvements on the barrier islands can make to the County's economy through enhanced tourism revenues. There has also been interest expressed in extending this beautification northward along Alternate U.S. Highway 19 from Downtown Clearwater to the Pasco County line. Alternate U.S. Highway 19 is a coastal highway that passes through the historic downtowns of Clearwater, Dunedin, Palm Harbor, and Tarpon Springs. When combined with the Gulf Boulevard project, it represents a coastal beautification corridor that interconnects numerous coastal communities important to the tourism industry in Pinellas County.

At the same time the citizens of Pinellas County were registering support for protecting open space and environmental lands at the polls, they soundly defeated in 1976 (by a ratio of 8 to 1)^{iv} a proposal for a limited access expressway running through north and mid-county along the McMullen-Booth corridor. This facility would have been funded through tolls. In response to this defeat, County officials decided to focus on upgrades to U.S. Highway 19 and to eliminate any consideration of additional planned expressways, although Pinellas County committed to construct roadways parallel to U.S. Highway 19 to relieve some of the traffic on this State roadway. One result of the referendum is that there has been no limited access road facility serving the tremendous growth that subsequently occurred in mid and north county. It was not until the local comprehensive planning effort of the late 1980s documented the deficiencies of the existing road network and at the same time presented a concrete plan to remedy the problem, that the citizens were ready to tax themselves for providing the necessary roads. With the need clearly presented and a plan in place, the residents of Pinellas County narrowly supported a countywide referendum in 1989 establishing a one-cent infrastructure sales tax (Penny for Pinellas) that would generate millions of dollars to fund construction of roads and other needed capital projects. But by this time the road construction program was focused on overcoming a huge backlog in the road system required by the area's rapid growth during the years since the end of World War II. This road program is further supported by revenue generated from the 6 cent local option gas tax approved by the County Commission. One important goal of the County's transportation program is to build roadway corridors parallel to overburdened state roads in order to relieve traffic congestion on those facilities. This goal has nearly been achieved through the construction of the Belcher Road and the East Lake/McMullen-Booth/Bayside Bridge/49th Street corridors west and east of U.S. Highway 19, and the Bryan Dairy Road/C.R.296/118th Street corridor south of Ulmerton Road (S.R.688). While achieving this objective will have taken about twenty-five years from planning to implementation, it was the passage of the first two Penny for Pinellas referenda that enabled the County to have sufficient funds to move these road projects forward.

The Penny for Pinellas has also allowed Pinellas County and the various municipalities to construct a wide range of needed capital projects in addition to roads that have had a dramatic and clearly recognizable improvement in the quality of life for residents throughout the County. As a result, voters approved an extension of the Penny for Pinellas sales tax in 1997 and in 2007, which results in a dedicated funding source for capital projects through the Year 2020.

One of the key projects that were undertaken by Pinellas County upon passage of the Penny for Pinellas in 1989 was the construction of the Pinellas Trail spanning the length of the county upon an abandoned railroad corridor. This urban multi-purpose trail is used extensively by both residents and visitors and has become part of the County's community fabric by providing a safe and pleasant way to travel from one community or neighborhood to another by bicycle, roller blade, or on foot. The railroad that once connected isolated villages in the late 19th and early 20th centuries has been replaced by a trail that serves a similar function. It brings neighborhoods together both physically and socially, and has even helped spur economic development in such areas as downtown Dunedin. The success of the Pinellas Trail has spawned the planning and development of additional recreation trails throughout Pinellas County; the salutary effect on the communities and neighborhoods traversed by these trails should further enhance the quality of life for both residents and visitors.

In Pinellas County at the beginning of the Twenty-first Century one finds for the most part an urban scene dominated by low buildings and low density housing. There is no central business district, which exemplifies and symbolizes Pinellas County in peoples' minds, such as downtown San Francisco does for the San Francisco Bay area. Rather than an impressive skyline, most people would associate Pinellas County with sandy beaches, miles of shoreline, an exemplary urban trail system, and diverse communities (many with their own downtowns). The area's natural resources and peninsular location have played a central role in helping define the County's image – and continue to do so. For example, the preservation and restoration efforts of the past several decades have resulted in a unique blend of urban and natural environments that is setting Pinellas County apart as a tourist destination that offers numerous and diverse ecological habitats and cultural resources within a major metropolitan area. Pinellas offers areas of matchless beauty, while the historic roots of the peninsula's numerous communities in most cases remain intact, although at times these roots are obscured by more recent development and years of neglect. The success of current efforts to preserve, enhance, and revitalize the County's diverse communities and natural environment will play a major role in determining the quality of life in Pinellas County and its municipalities.

ⁱ Although Pinellas County is an urban area, it includes neighborhoods that are suburban in character. The elements that distinguish a neighborhood as suburban can be applied in a wide variety of situations, which helps explain the rich diversity of suburbs. Generally, suburbs are predominantly residential areas comprised mainly of individual houses. While the physical character of these neighborhoods is suburban, the way of life they contain is urban. This perspective on the suburban condition is based on the observations of Witold Rybczynski, Professor of Urbanism, University of Pennsylvania.

ⁱⁱ Bureau of the Census, U.S. Department of Commerce, 1990.

ⁱⁱⁱ Personal communication with Ms. Ellyn Kadel, Director of Real Estate Management, Pinellas County General Services Department, Pinellas County, Florida, 1999.

^{iv} Personal communication with Mr. Brian Smith, Pinellas County Planning Director, Pinellas County, Florida, 1999.