



# **2011 Strategic Plan**

City of Key West, Florida

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## EXECUTIVE SUMMARY

The Key West City Commission initiated the development of the 2011 Strategic Plan in recognition of both a changing Key West and a desire to shape a broad vision of the future. This document is intended as a five-year plan with a ten-year or longer perspective. The mayor expressed a deep concern that the committee work to maintain our identity as a community even as we find a balance with other things that visitors and residents want. In seeking this balance, commissioners felt that we needed “an overarching vision or philosophy of what type of community we want to become,” or as another said, paying close attention to “what the community wants” and in the long-term, expressed still another commissioner, to “reinvent our image”. Clearly the intent was to focus on fundamental values that the entire community—government, business, nonprofits, individuals-- would strive to achieve.

The Strategic Planning Committee held an organizing meeting in April of 2010 and over the summer heard from various city officials and others who contributed background information and perspectives important to our task. While pouring through demographic and economic data on how Key West has changed in the first decade of the 21<sup>st</sup> century, the committee also began a review of a number of surveys and studies of what Key West residents have said about their core values. These studies reflected important trends affecting the city. A review of strategic plans done by other small cities in the U.S. and a limited review of nationwide studies constituted a look at ourselves from the experience of others.

An outline of the Strategic Plan emerged, organized into six domains: Economy, Environment, Culture, Infrastructure, Government and Quality of Life. The development of goals, objectives, initiatives, and indicators of progress within each domain then became the primary focus of our work.

This current iteration of the Strategic Plan is a working draft which will continue to be amended as needed based on input from the public and community partners. The finalized version of the Strategic Plan will be presented to the City Commissioners in May.

In the end, the committee came to appreciate Key West all the more for the gem that it is. There is so much to love about it. There is also reason to understand that there are trends which are impacting the economy and the community which present opportunities—and challenges. Changes over which we have limited control will force us to action even as we try to maintain our identity and provide a measure of stability in our economy. This document is the Committee’s best effort to present to the citizens of Key West a strategic plan that will both protect and enhance our core values while bending to economic and social realities.

## INTRODUCTION

The Strategic Planning Committee, as established by City Commission Resolution 10-036, called for each Commissioner to appoint one person from his or her district and directed the Strategic Planning Committee to appoint two additional members. The Committee first met in late April, 2010 to organize, hire a consultant, and begin to study the past decade. Our charge took us beyond the 2005 Strategic Plan focus on City government goals to include what type of society Key West was to become and what all residents collectively could do together to help create that society. The group focused at first on our changing demographic context as well as a review of those surveys and studies of resident values and concerns and then proceeded to examine strategic plans from other U.S. small cities, and began a limited consideration of nationwide research. Relevant data and insight from all of this material is cited and referenced in the Attachments II and III.

From this background the Committee developed goals and actions that seemed both necessary and desirable to Key West citizens. That is the backbone of the Strategic Plan, but first the Committee wishes to provide our understanding of this background in such a way that makes the case for clear and compelling reasons for adopting this plan.

The first decade of the 21<sup>st</sup> century has offered up a familiar pattern in our city's social and economic history. Though perhaps not as dramatic as earlier historic economic disruptions, over the past decade both resident and visitor populations have gradually decreased, accentuated by a population shift that brought an increase in older residents and a decrease in younger residents.

In tandem with these changes the city has seen an increase in both the number of seasonal residents and in the income level of residents and visitors. These trends produced changes throughout the retail market, a rise in art and literary venues, and a spike in resident and visitor interest in issues such as the environment and our colorful history. This background of both changing demographics and shifting values was the driving force in developing specific content for the six domains.

At the foundation of this plan are four simple truths\*:

1. We are all in this together: government, business, nonprofits, civic organizations and individuals have mutual responsibilities in reaching the goals
2. Residents and visitors have quite similar values: "the same things that make Key West a wonderful place to live also make it a wonderful place to visit"
3. Demands are high: today's residents and visitors want more and better everything, from infrastructure to art, "One Human Family" to a beautiful environment

4. What is good for environment and culture is good for our “place-based” economy

Six challenges we as a community must deal with as we go forward:

1. The importance of striking the right balance of Key West tradition and vision and between community values and commercial activities
2. Much of our income is earned elsewhere and can move rather quickly
3. Key West has “destination” competitors: state, national and international
4. A growing movement for cities worldwide is to invest in culture to spur economic growth
5. Concern from both Key West residents and visitors about “value for the price”
6. What happens if we do nothing? A sustainable economy requires that we take charge—or take the blame

\* The issues identified as the Four Truths and the Six Challenges are discussed in Attachment I.

## STRATEGIC PLANNING PROCESS

### ***Phase I - Completed***

An early decision by the committee was to take a learn-as-you-go approach to planning. The more we learned about changes that had occurred and values that residents held, the better we understood the parameters of a Strategic Plan that would protect what needs protecting and enhance what the Key West community feels is important. Based on what we learned and the ensuing discussions, we developed a Vision Statement and a Mission Statement.

### ***Phase II - Completed***

General areas were staked out and goals were developed which the committee thought addressed the values and concerns raised in our preliminary study. Objectives were developed to guide the goals and further clarify the desired ends; initiatives and indicators of progress provided even more specific expectations of the work to be accomplished.

### ***Phase III - In Process (March and April 2011)***

Once the outline of domains, goals, objectives, and initiatives is completed the next stage is the engagement of the public to encourage participation in the process and gather feedback to be incorporated into the document. Over a two month period the members of the Strategic Planning Committee will be meeting with each Commissioner, participating in District Meetings, and conducting presentations for community social, business and special interest groups. The goal of these meetings is to educate the public on the Strategic Plan, to gather information on the working draft, and to encourage their participation in the Strategic Planning Process.

### ***Phase IV – (May 2011)***

In May the finalized version of the Strategic Plan will be presented to the City Commission for review and adoption.

### ***Phase V – (Beginning June 2011)***

Once the plan is adopted by the City Commission the real work begins. It is the implementation of the plan and the requisite ongoing monitoring and reporting that will transform this plan from a collection of words on paper to a guiding force for the city.

Note: It was never intended that clarification and changes would be precluded during plan implementation. The general direction we think addresses our future, but it is expected that “learn as you go” will remain a part of the planning process. If the vision is to be realized, the means will need to be adjusted to achieve the ends more efficiently and effectively.

## VISION

Key West is a beautiful natural environment with a vibrant culture, an interesting historical architecture, active neighborhoods, and community-wide interests that are supported by involved residents from all walks of life and a responsible and responsive government.

## MISSION

Our mission is to protect our natural and built environment and honor our local heritage and cultural identity with citizens actively engaged in the life of our neighborhoods and community. Together we shall promote ongoing redevelopment of a sustainable economy, quality of life, and modern city infrastructure. Our government shall act on behalf of the long-term, generational interests of residents and visitors of Key West.

## The Economy

### Goal # 1: Economic diversification that sustains and grows a healthy economy

**Objective: Support and nurture existing sources of income for the City and community while encouraging the development of new ventures**

**Initiatives:**

- Create a City Venture Development Office to act as liaison, facilitator and solicitor for new ventures
- Initiate a study of policy alternatives that would support new economic ventures and focus on the ease of doing business for city clients and customers
- Recognize and nurture military and non-military government and government related employment and their contribution to the local economy
- The City Manager will call annual meetings of business and other interests to discuss what is happening in the U.S. and Cuba that can possibly impact the status quo

**Objective: Continue to develop the greater Duval Street area as the mixed use, vibrant, commercial and social center of the City**

**Initiatives:**

- Create a design plan for Duval that reflects its multiple uses and protects its historic character
- Increase security through Chamber of Commerce and Business Guild programs on educating employees and customers about how to stay safe
- Partner with local business owners and the Duval Street Committee to make streetscape improvements
- Consider and adopt the recommendations of the Traffic Study
- Increase the number and cleanliness of public restrooms

**Objective: Increase visibility and viability of areas outside of the Duval Street corridor**

**Initiatives:**

- Create additional bicycle and pedestrian friendly pathways for accessing and connecting areas to each other and downtown
- Expand "loop" bus service to middle and eastern areas of the island
- Install and maintain unmanned location and information kiosks throughout the city indicating attractions and available public services
- Bahama Village Redevelopment Advisory Committee will develop a long-term vision and plan for the development of Bahama Village and submit it to the City Commission within one year of adoption of the Strategic Plan
- The Commission will develop, or charge a committee with developing, a long-term vision and plan for the development of the Key West Bight and Caroline Street Corridor and submit it to the City Commission within one year of the adoption of the Strategic Plan



**Goal # 2: Commercial and residential (re)development appropriate to a small city and human-scale environment**

***Objective: City documents reflect a clear and cogent approach to development and re-development***

***Initiative:***

- *The Commission appoints representatives to study congruency*

***Objective: Increase efforts among City, County and State governments to develop a congruent vision for the area***

***Initiative:***

- *The Commission appoints representatives to study and recommend changes for congruency*

***Objective: Design as the lead factor in building and landscaping***

***Initiative:***

- *Encourage the consideration of design elements prior to development*

**Goal # 3: Optimum 'Key West' experience**

***Objective: Understand the needs, issues and concerns of residents and visitors***

***Initiatives:***

- *Annual and decennial review of visitor perceptions*
- *Annual and decennial review of resident perceptions*

**Goal # 4: Invest in the development of our workforce**

***Objective: Understand the needs, issues and concerns of the hospitality workforce and employers***

***Initiative:***

- *Encourage our business community to intensely educate staff to become more knowledgeable and enthusiastic about the business, agency or interest with which they are engaged as well as about the City at-large*
- *Encourage businesses to educate their staff on the vision and ethics of the City*

**Indicators of success:**

- Creation of a City Venture Development Office
- Completion of a study of policy alternatives
- Commission assigned formal and social contacts with the military

- A design plan for the Duval Street corridor is created, adopted and implemented
- Review of crime statistics
- Improvements taken by the Chamber of Commerce, the Business Guild, and Duval street area associations
- Creation of additional bicycle and pedestrian friendly pathways
- Expanded loop bus service
- Installation of location/information kiosks throughout the city
- Submission and adoption of a Bahama Village Redevelopment Plan and ongoing annual progress reports
- Submission and adoption of a plan for the Redevelopment Plan for the Key West bight and the Caroline Street corridor
- Review of approach to development and redevelopment process and documents
- Results of surveys of residents and visitors
- TDC reports

## The Environment

**Goal # 1: A natural environment that enhances the 'Key West' experience for residents and visitors alike**

**Objective: Ongoing protection and monitoring of our local environment**

**Initiative:**

- Partner with local Environmental groups to monitor the environment

**Objective: Improve streetscapes**

**Initiatives:**

- Consider design factors such as signage, lighting, shade trees and seating which make streets inviting and add to the residents/visitors experience
- Strict enforcement of existing littering laws and ordinances

**Goal # 2: The City's built environment reflects and supports Key West values, architectural history, and mixed uses**

**Objective: Strict adherence to HARC guidelines**

**Initiative:**

- Annual review of exemptions granted by HARC

**Objective: Establish a level of design excellence for the entire city**

**Initiative:**

- City Planner's office to craft an initiative

**Goal # 3: The conservation and responsible consumption and disposal of all natural and manmade resources**

**Objective: Five percent Increase in solid waste recycling per year**

**Initiative:**

- Adoption of mandatory recycling for all residents, businesses and non-profits
- Implementation of the Key West Climate Action Plan
- Implementation of the Vision and Mission of the Key West Clean and Green Committee

**Goal # 4: Protect and enhance our natural environment including our tree canopy, habitats, open space and greenways to improve air and water quality**

**Objective: Protect and enhance public and private environmental features that contribute to the overall quality of the Key West environment**

**Initiative:**

- *Commission directs an environmental scan to provide a baseline for future environmental audits*

**Goal # 5: The City leads by example utilizing sustainable practices in city operations, such as “green purchasing”, reduction of fossil fuel consumption in buildings and fleet and innovations in building design**

***Objective: Departmental action plans outlining green practices***

**Initiative:**

- *Each city department keeps a record of efforts to go green*

**Goal # 6: Partnership with community groups to address environmental issues and increase public education about environmental concerns**

***Objective: A community-wide environmental agenda***

**Initiative:**

- *Work with interested community groups to development a community-wide environmental Action Plan including goals and timetables*

**Indicators of success:**

- Statistics/Data collected on the condition of the reef, air and water quality
- Results of the annual Residents Survey
- Annual report to the Commission by the Tree Commission
- Annual Code Compliance reporting
- Adherence to MARC requirements
- Annual report to the Commission on issues and improvements in protecting historical architecture by the HARC Board
- Percentage of solid waste being recycled
- Annual report to the Commission on responsible consumption by the Sustainability Advisory Board
- Annual report to the Commission on the 12 Key Elements of the Climate Action Plan
- Reported progress by the Key West Clean and Green Committee
- Annual progress reports by each City Department
- Annual City Manager’s Report
- Annual reporting of progress towards goals on the community-wide environmental agenda

## Culture

### Goal # 1: The identification and promotion of the “unique” character and culture of Key West

**Objective: Recognize and promote Key West as America’s Caribbean Island; a confluence of Bahamian/British aristocracy, African American, Cuban, European, and influences from across the U.S.**

**Initiatives:**

- Key West’s cultural mix is reflected in the marketing
- Historical markers noting the community’s various cultural strains and their contribution to the community will be erected and maintained
- A map of cultural history points of interest will be created and distributed at lodging establishments, the Business Guild, and the Chamber of Commerce
- Capture our tradition of diversity through oral histories, documents, and historic images

**Objective: Promote Key West as an open community in which socio-economic levels, ethnicity, and a variety of lifestyles readily mix**

**initiative:**

- Marketing efforts will reflect images and language that depicts Key West as a broadly open community – One Human Family

**Objective: Promote our History**

**Initiatives:**

- Nurture and promote opportunities for learning about our history through the library, the community college as well as historical, archeological and cultural resources, programs and services
- Erect historical markers, develop & distribute printed pamphlets, and develop and promote virtual presentations
- Nurture and promote cooperation among businesses, neighborhoods and civic groups with interest in development of the historical areas and topics

### Goal # 2: Key West seen as a viable destination for “Cultural Tourism”

**Objective: Expand the brand Key West from primarily “Come as You Are” to Include promoting the cultural and creative spirit of the island**

**Initiative:**

- Support “Arts Tourism” through the promotion of culture related events and festivals

**Goal # 3: The arts are an integral part of the living environment in Key West**

***Objective: Cooperative efforts among public and private art, music, dance, theater, literary and culinary associations and businesses and civic groups too promote the arts***

***Initiative:***

- *Promote and support funding for public art that provides for the integration of the arts into public and private development and re- development throughout the city*
- *Promote a Public Art Master Plan setting priorities for the locations and funding of projects and providing a framework for the shared financial and professional resources needed*

**Indicators of success:**

- Review of advertising to determine the image being presented
- Increase in the number of historical markers
- Cultural history maps have been developed and are being distributed
- Review of marketing strategies
- Number of times “Bohemia in the Tropics” has been aired in a six month period
- Number of community partners involved in promoting our history

## Infrastructure

**Goal # 1: A transportation system which is aesthetically attractive, functional, efficient, safe and environmentally sensitive**

***Objective: Completion of a transportation study including recommendations for improvement***

***Initiatives:***

- *Development and implementation of a Multimodal Transportation Plan*
- *Coordination with county, state, and FDOT to provide for ongoing maintenance*
- *Improve our city's ADA accessibility*
- *Educate residents and visitors regarding available bus services*
- *Provide bus schedules at bus stops and via smart phone technology*

**Goal # 2: Safe and secure neighborhoods and business districts**

***Objectives: Allocation of resources to support adequate personnel, facilities and equipment for:***

***Code Enforcement  
Law Enforcement  
Fire and Rescue  
Hurricane Preparedness  
Environmental Disaster Response  
Homeland Security***

***Initiatives:***

- *Proactive planning to meet community safety needs*
- *Compliance with existing Codes*
- *Collaboration with neighborhood associations to establish crime watch areas*

**Goal # 3: Parks and recreation areas distributed throughout the community which are appropriately staffed and equipped to provide safe, healthy, and constructive recreational opportunities for children, youth and adults**

***Objective: Parks and recreation areas are easily accessible to residents and visitors***

***Initiatives:***

- *Conduct an assessment of the City's parks and recreational areas*
- *Develop Truman Waterfront Park*

**Goal # 4: Efficient and cost-effective municipal services (water, sewer, solid waste, electricity, and electronic communication) which are environmentally-sensitive and promote attractive public spaces**

**Objective: Review and evaluate services**

**Initiative:**

- Partner with providers to establish and monitor performance standards and cost effectiveness

**Objective: Continue work on sewer and storm water projects**

**Goal # 5: Long term sustainability of the City's hard assets**

**Objective: Accurate inventory of the City's hard assets including review of city-occupied dwellings**

**Initiative:**

- Development and implementation of a continuous inventory process for the City's hard assets

**Objective: The efficient and effective maintenance of the City's hard assets**

**Initiative:**

- Development and implementation of a continuous assessment and maintenance process for the City's hard assets

**Indicators of success:**

- Resident and Visitor survey
- The creation of a long-term plan for the ongoing maintenance of streets and sidewalks
- Crime statistics
- Annual Report by the Truman Waterfront Advisory Board
- Implementation of an inventory process for the City's hard assets
- Implementation of an assessment and maintenance process for the City's hard assets



## Government

### **Goal # 1: An ethical, open and accountable relationship between City government and the citizens of Key West**

**Objective:** Formal adoption of a code of ethics governing the City Commission and all City employees and contractors

**Initiatives:**

- *Development and implementation of Code of Ethics*
- *Citizen committee reviews ethics ordinances every two years to recommend changes in the ethics ordinance to the Commission*

### **Goal # 2: A fair and equitable balance between those policies that address community values and those that relate to the economy**

**Objective:** *Our economy is enhanced while continuing to enhance our community values*

**Initiative:**

- *Consider impact on the community and community values in all decision making*

### **Goal # 3: Team Key West - Cooperative planning efforts among civic and non-profit organizations, businesses, and all government agencies**

**Objective:** *Collaboration among community partners to address specific concerns*

**Initiatives:**

- *The Mayor of Key West will invite members of non-profit, public and private organizations to collaboratively address one area of need each year for the lower Keys region*
- *Development of an Action Plan for the selected area of need*

### **Goal # 4: Fully integrate the Strategic Plan, Comprehensive Plan, Action Plan, departmental business and performance management plans with financial planning and resource allocation**

**Objective:** *Six persons, two each with specific knowledge of the Strategic Plan, the Comprehensive Plan, and the City Action Plan will conduct an overall review of the plans and recommend changes needed for reasons of conflict or efficiency*

**Initiative:**

- *The City Manager and One Commissioner will co-chair a citizen and public employee appointed committee to align the plans*

**Goal # 5: An operating and capital-improvement strategy which is structurally balanced over the long term and provides for the effective and efficient management of resources**

**Objective: Planned management**

**Initiative:**

- *Implementation of the 5 Year Capital Improvement Plan*
- *Ensure that Goals of Capital Improvement Plan are consistent with the Strategic Plan*

**Goal # 6: A legal and financial framework that develops and sustains a high performing workforce**

**Objective: Employee contracts and policies are fair and promote ethical conduct**

**Initiative:**

- *Employee panel to conduct a bi-annual review of policies that affect conduct, work, and procedures*

**Objective: A skilled and efficient workforce that delivers quality services and reflects the diversity of our community**

**Initiatives:**

- *Maintain sufficiently competitive pay and benefits to attract quality employees to City government*
- *Implementation of an annual Employee Evaluation Process based on established performance metrics*

**Goal # 7: Ongoing assessment of government functioning**

**Objective: Implementation of a formal citizen feedback mechanism**

**Initiative:**

- *The Commission will appoint four citizens to draw up an annual questionnaire, joined by three persons appointed by the City Manager and assisted by IT to prepare a questionnaire to citizens addressing issues contained in the Strategic and Action Plans*

**Objective: Enhance the City website**

**Initiatives:**

- *Improve communication through increased usage of available internet tools*

- *Develop a uniform resident response tracking system for all non-public safety departments*
- *Update the website format to make it more easily accessible and user friendly*

**Indicators of success:**

- Adoption of a Code of Ethics
- Resident and Visitor Survey
- Development and Implementation of an Action Plan to address the area of need
- Strategic Plan, Action Plan, and Comprehensive Plan have been aligned
- Biannual report to the City Commission by the City Manager
- Formation of an employee panel to review policies that affect work, conduct and procedures
- Workforce turnover rate
- Implementation of an ongoing Resident survey process
- Resident and Visitor feedback on the City's website

## Quality of Life

### Goal # 1: Key West protects and promotes the health of its residents and visitors

**Objective: Promote health services to assure the adequacy of primary care medical, mental health, and oral health services**

**Initiative:**

- Present to the Commission a summary of the annual Health Profile report and select one area to publicize and improve over the following year

**Objective: Promote a comprehensive and cohesive system of prevention and early intervention to residents of all ages**

**Initiative:**

- Proclaim a city 'Health Month' by publishing and encouraging discussion in schools and in the media of the Robert Woods Johnson Annual Reports

### Goal # 2: Housing is available at various income levels to meet the needs of our population demographic

**Objective: Support public and private efforts to make low and middle income housing attainable**

**Initiatives:**

- Help create affordable housing opportunities not limited to new development
- Explore means of managing insurance costs
- Creation of tax benefits for existing affordable rental units
- Complete inventory of assigned existing affordable rental units

### Goal # 3: Key West offers its children, youth and adults educational opportunities from early readiness through lifelong education

**Objective: Encourage increased awareness of and involvement in community educational opportunities**

**Initiative:**

- Utilize the City's website to disseminate information on community educational opportunities

### Goal # 4: Full and part-time residents (children, youth and adults) are actively involved in the community

**Objective: Promote community service projects through schools, neighborhood associations, and civic and social groups**

**Initiative:**

- *Utilize the City's website to disseminate information on volunteer opportunities*

**Goal # 5: The homeless will be offered a helping hand in return for good citizenship**

**Objective: Improve the quality of life for all in our neighborhoods**

**Initiative:**

- *Make it clear that Key West is compassionate but unwilling to be exploited*
- *Develop a community-wide database of services for the homeless*
- *Partner with organizations working to prevent homelessness, provide outreach, and provide support and services to the homeless population*

**Indicators of success:**

- Statistics on healthy lifestyle choices: communicable and chronic diseases, cancer, heart disease, etc.
- 'Health Month' declared and discussions held
- Development of inventory list of assigned affordable rental units
- Implementation of tax benefits for existing affordable rentals
- An annual survey of schools and local associations regarding the extent of volunteer activity
- The annual report of progress to the City Commission from SHAL in conjunction with the Mayor's Homeless Committee

## **IMPLEMENTATION, MONITORING AND REPORTING**

The 2011 Key West Strategic Plan is for all of us—and it will take a commitment from all of us to move toward our vision. Implementation will require leaders from different sectors of our community to inspire and help provide the political will and make plans that lay out roles and responsibilities.

The first step in implementation is to hear from leaders in other cities about lessons learned in carrying out their plans. Of particular importance will be to learn how they organized to 1) draw on persons committed to the public interest who have a long-range and broad view of the future, and 2) actually get the Strategic Plan implemented with multiple organizations and individuals participating. Regardless of how structured, those charged with implementation will answer to the Key West City Commission. As these steps are in progress, activities that clearly would be carried out under sole jurisdiction, for example, by the City Manager's office, could proceed. The long-range and "Big Picture" implementation responsibilities involving multi-organization cooperation to execute will roll out as the implementation plan is executed.

As made clear throughout the Strategic Plan, there is an expectation that all involved will be held responsible by periodic reporting to the public and the Commission. We are all in this together and we depend on one another for best efforts.

An Annual Review of Progress on the Strategic Plan will be presented by the Leadership Team to assure continued attention to the vision.

It was clear to the committee that after adoption of the plan by the Commission, specific implementation plans would need to be drawn up with responsibilities and expected timelines for assigned tasks. The Commission reserves the right to choose priorities in implementation over the months and years ensuing plan adoption.

## ATTACHMENT I

### A discussion of Simple Truths and the Challenges in the INTRODUCTION

#### Key Understandings in Developing this Plan

In order to make the case for a strategic plan, we have provided data sources (see Attachments II and III), highlights of things we learned, and challenges we must confront. First, an important insight was that a successful plan for our city will require that **we are all in this together**. Not government, not business, not nonprofit, civic organizations or individuals alone could get us to the future that residents and visitors have envisioned. We have mutual responsibilities. Secondly, we reaffirmed the City's 2004 Resident and Visitor Study in stating that **"the same things that make Key West a wonderful place to visit also make it a wonderful place to live."** In a word, what most visitors want most residents want. This resident-visitor agreement on values was good news in that there did not have to be one plan for residents and a separate plan for visitors. But we are not off the hook, as **demands for quality are increasing**. Excellent basic services are bedrock, those things included in the Infrastructure, Quality of Life, and Government domains. Examples such as personal safety, clean drinking water, and a clean city are basics and simply expected.

High demands are also made in the Culture and Environment Domains. These are what make Key West so rare and which form the core attractions of our "place-based" economy: aside from good weather, a beautiful natural environment, historic architecture, controlled growth and a pedestrian and bicycle friendly city. Equally as valuable, as these domains highlight, are a tolerant, welcoming community, a diverse and lively culture and an involved citizenry. This human dimension is summed up in our touchstone "One Human Family" motto which beckons people from all over the U.S. and the world to visit and live in Key West. Reviewing the data from this perspective lead us to a fourth key building block for this plan: **what is good for the environment and the culture is good for the economy**.

#### Challenges We Must Deal With

Clearly we must strike acceptable **balances between tradition and vision as well as between community values and commercial activity**. The message in a nutshell: change, but maintain uniqueness; keep up with the times, but don't become "Anywhere U.S.A." The importance of getting this right was underscored by a demographic and economic challenge not at first fully appreciated. As it turns out, an unusually high percentage of resident income, compared to that of the United States as a whole, has come from interest, dividends, pensions and the like. Well over half of the resident income as reported to the IRS is not dependent on the local economy. **Much of this wealth** therefore is similar to seasonal resident and visitor money in that it **has an unusually high potential of being mobile**. In the vernacular, a sizeable portion of our

local economy—residents, seasonal residents and visitors alike--has legs and can leave the Keys if we are inattentive to this balancing act.

Yet another challenge is that we need to be acutely aware that **Key West has competitors**. As the mayor of Charleston, S.C. suggested, interesting and attractive cities not only compete across the U.S., but we are also in an international competition. At least 1/5 of our Key West visitors come from abroad. And as one study noted, there is a growing movement for **cities worldwide to invest in culture to spur economic growth**.

The issue of competitiveness is underscored in that though visitors say they would like to come back to Key West, residents and visitors alike also say that a highly important but **unsatisfying aspect of living or visiting here is “value for the price.”** So far, notes NOAA Chief Economist Leeworthy, demand for Key West remains strong, but as one of the highest price tourist markets in Florida, our value for the price is always being compared. From this perspective, a major challenge will be to either lower prices or increase the value of the Key West experience for major parts of all three population groups—visitors, seasonal and permanent residents.

**What happens if we do nothing?** A sustainable economy requires that we take charge—or take the blame. An historically earlier dependence on, for example, sponging, cigar-making and the Navy put us at the mercy of the decisions of others. But at least now, in our **culture-and-environment-driven economy, we are in charge of our destiny**—and must take the blame if we don’t take charge. Leadership with a long-term and broad vision is necessary to develop both a sustainable economy and protect enduring community values.



**Attachment II  
All Data and References**

**DATA AND RATIONALE THE STRATEGIC PLANNING COMMITTEE CONSIDERED  
IN DEVELOPING THE KEY WEST STRATEGIC PLAN**

The General Demographic and Economic Profile is Followed by References in Chronological Order; Books Follow Studies

The Strategic Planning Committee (SPC) early in its' discussions committed to reviewing existing research and documentation from national and state data sources as well as studies, surveys and proceedings of and about Key West. This consisted of first, a broad review of demographic and economic trends that have been occurring in Key West--and the County where only county-level data was available--during the first decade of the 21<sup>st</sup> century. Second, we made a commitment to review citizen views as they were expressed through an array of studies, surveys and proceedings. Given the extensive documentation already in place as we began our work, we did not feel the need to develop a new survey but rather to use existing work in the development of the Key West Strategic Plan.

These documents are of varied scientific validity, but all contributed to our findings as presented in the proposed Strategic Plan. The more informal data from these documents were able to be used as re-enforcing evidence when we found similar themes across documents.

**Introduction: A Profile Of Change 2000-2009**

The summary table below is followed by explanatory notes on each of the cells in the table.

Summary Table of Demographic and Income Change

	Permanent Residents (2000 to 2006-2009*)	Seasonal Residents (2000 to 2006-2008)	Visitors*** (1998 to 2008)
Number of People	(1**) – 12% (KW 2009 only)	(2) + 57% (KW)	(3) – 14% (MC = all of Monroe County)
Median Age	(4) + 6% (KW)	(5) + (see note re: this cell) (KW)	(6) + 6% (MC)
Income	(7) + 22% (KW)	(8) + (see note re: this cell) (KW)	(9) + 35% (MC)

\* 2006-2009” is a 4-year Census estimate made in 2010

\*\*Cell Numbers (in parentheses) refer to “Cell1”, “Cell 2” etc. below. That information is important for accurate interpretation.

**Population**

Cell 1 - Permanent Resident Population

Source: Census

	2000	2009	% change
Key West	25,478	22,463	- 12%
Monroe County	79, 589	73,165	- 8%

Key West population projections\*

Source: Bureau of Economic and Business Research (BEBR: Business School, UF)

Key West	2010	2015	2020	2025	2030
Low	23,498	22,599	21,669	20,770	19,902
Medium	24,242	24,056	23,839	23,622	23,405
High	24,955	25,482	25,823	26,443	26,908

\*Extrapolation from Bureau of Business and Economic Research (BEBR), University of Florida, V. 43, Bulletin 156, March 2010 (see Table 11).

Cell 2 - Seasonal Resident Population

Source: Derived from Census

	Yearly Average Seasonal Population*
Key West 2000 (vacancy rate = 17%)	2,000 (KW Eval & Appraisal Report est.)
Key West 2006-08 (vacancy rate = 34%)	4,703
Monroe Co. 2000 (vacancy rate = 32%)	16,002
Monroe Co. 2006-08 (vacancy rate = 44%)	22,924

\* Average based on an assumed 50% occupancy as a yearly average of only those vacant units that are neither for sale or rent; assumes average household size in KW for numbers in each unit.

Cell 3 - Visitor Population

From 1996-2008, the number of visitors to the Keys decreased by 2.33 million (from 16.27 million to 13.94 million) (NOAA: Linking the Economy and Environment of the Florida Keys/Key West. National Oceanic and Atmospheric Administration, December, 2009).

Cell 4 – Median Age: Permanent Resident Population; Source: Census

Median Age	2000	2006-2009	% increase
Key West	38.9	41.4	6%
Monroe County	42.6	47.2 (2006-2009)	10%
Florida	38.7	39.7	2.6%
U.S.	35.3	36.7	4%

Changes by age categories: During the period 2000 through 2006-2008 in Key West, ages 20-55 decreased 10.6% and those 55 and older increased 9.4%

Cell 5 - Seasonal Resident

There is no data for the age of seasonal populations. We reasoned that along with the increasing ages of permanent residents as well as visitors (Cells 4 and 6), it is likely that the seasonal population is also increasing at a somewhat at a similar rate.

Cell 6 - Visitor Population

The average age of visitors to Monroe County in 2007-08 was 49.5. In the winter months the average was 54.3. In the 12 years between 1996 and 2008, visitors to the Keys increased in age by 6% (NOAA), nearly 10% in the winter season (derived from NOAA).

**Income**

Cell 7 - (3 Views) Permanent Population Only

Census: Per Capita Income (median)

Median Per Capita Income	2000	2006-2009	Change	Key West & Monroe compared to Florida
Key West	\$26,316	\$33,800	+ 22%	19 % higher
Monroe Co.	\$26,102	\$36,086	+ 28%	29% higher
Florida	\$21,557	\$26,503	+ 18%	-----

OEDR (Office of Economic and Demographic Research, Florida Legislature) Monroe County; KW data not provided from this source

Median Salary	2008	Monroe compared to Florida
Monroe County	\$36,626	-----
Florida	\$40,579	FL is 10% higher

IRS, 2007 Tax Year; Total Income by Zip Code\*

	Monroe	Florida	U.S.
Income derived from salaries, wages, tips, bonuses	37%	59%	70%
Income derived from investments, interest, pensions, SS etc	63%	41%	30%

\* KW jurisdiction alone not available

The NOAA study (XV below) discusses "a continual decline in the percentage of income earned by work in Monroe County. By 2008, only about 49% of income received by residents of Monroe County was received from work within Monroe County" (p. 2).

Cell 8 - Seasonal Population

There is no data on the income of seasonal residents. It seems reasonable, however, that the income of those with a second home is keeping pace with the median of other residents and visitors.

Cell 9 - Visitor Population

Visitor income showed a marked change upward between 1996 and 2008, with those making over \$100,000 having increased 35%. Every income category less than \$100,000 saw a decrease in numbers of visitors. Overall visitor spending was up 22%. (NOAA)

**Estimates of Tourism Economic Impact in Key West**

Economic Contribution of Recreating Visitors to the Florida Keys/Key West”, part of the larger study Linking the Economy and the Environment Of Florida Keys/Key West, NOAA, (2010; cited XV below). The authors put visitor spending in Monroe County at \$2.234B (p. 7) during the Dec 2007 – November 2008 period or 60% of total sales indirect and induced effects (multipliers). [See also VI and VII below]

Total Number of Visitors (person days) and Visitor Spending in Key West by Means of Access\*

Means of Travel	Total Visitor Number	Percent of Total Visitor Number	Total Visitor Spending	Percent of Total Visitor Spending
Auto: Overnight	3.32M	55%	\$569M	54%
Auto: Day Trip	.48M	8%	\$48M	5%
Air	1.3M	22%	\$343M	33%
Cruise Ship	.74M**	12%	\$62M	6%
Ferry	.2M	3%	\$23M	2%

\*Source of data: NOAA; calculations for this table by Strategic Planning Committee.

\*\*Source City of Key West Port Operations. All figures above based on December 2007- November 2008 data

**Studies, Surveys, and Proceedings of City-Wide Meetings**

The following studies, surveys and proceedings were extracted for data relevant to the Strategic Plan. The findings listed are not intended to be summaries of the entire documents.

**I. Vision 2020. Key West Chamber of Commerce (1998, updates 2004, 2008 incomplete).**

The KW Chamber, in conjunction with 10 community groups put together a list of 75 issues and published them as a survey in the Citizen and Island News. Residents were asked to rank order the items. The Chamber then put this info into goals via an all-day conference of 150 community leaders. They published a progress report in 2004.

By the year 2020: (14 goals for the city)

- Goal 1 workforce housing significantly increased
- Goal 2 population will increase 10% (30,000)
- Goal 3 expanded 10-month tourist season
- Goal 4 we will have protected and enhanced our culture—America’s Caribbean Island
- Goal 5 one of the “cleanest small cities in America”
- Goal 6 southside beaches restored and accessible
- Goal 7 a walkable and bikeable island
- Goal 8 infrastructure improved (communications, power, water, sewer, city buildings...power underground)
- Goal 9 linkage to Cuba
- Goal 10 water pollutants reduced by 80%
- Goal 11 viable seafood industry
- Goal 12 cost of government effectively managed and % of local revenue for gov’t from property tax reduced
- Goal 13 opportunities for youth improved
- Goal 14 better relationship between government and citizens

The Chamber sought to achieve “the goal of no more than one third of [worker] income...necessary to fund housing.” In subsequent follow-up studies, efforts to achieve this goal were documented but the goal remained elusive and according to the FIU study, may even be further from realization than it was in 1998.

The Chamber has also suggested that we “keep a close eye on Cuba and actively plan for its opening” (2004 update).

## **II. Key West Resident/Visitor Planning Committee Report (November, 2004).**

This Commission-appointed committee consisted of 14 Key West residents.

They shared Five Common Beliefs to frame the Comprehensive Plan:

- residential neighborhoods are important
- tourism is principal, but passive income is significant
- climate, environment, water, history, diversity, lifestyle are all valued
- marine environment important
- history and historic buildings are our legacy and need to be preserved

### Broad Goals:

- “Preserve and enhance the uniqueness of KW”
- “Assure a sustainable environment” for our economy (noted as tourism based but “passive income” is a significant secondary component...)”)

### Central thesis of committee’s thinking:

- What is good for residents is good for visitors (clean beaches, water, air, general cleanliness, noise pollution, historic preservation, canopy, safety...)

Committee member Chris Belland’s letter to the Res/Vis Committee states in part: “I think it is incumbent upon the city to take certain steps to educate both residents and visitors as to who we are, what we want as a community and how to achieve those ends. Whether it is the fact that we wish to enjoy a certain level of quiet...or that we are concerned about water quality, we need to raise the level of awareness of these issues.” ...Parks “should not be allowed to become homeless safe zones.” [italics added]

This committee made several economic recommendations: market Key West as a boutique conference opportunity; assure that whomever is marketing Key West does so in a way “that is indicative of our pride in our community.”; and “enable the creation of a wireless internet service”.

Other recommendations::

- Noise abatement
- Land, park, beach care
- Visual environment awareness
- City cleanliness
- Historic preservation
- Tree canopy
- Affordable housing
- Homeless
- High turnover of population affects businesses in staffing and “affects the civic fabric of our communities in countless ways.” New residents come in who are unaware of ordinances and community standards
- Multi-modal transportation was listed as a key part of our future but deferred to the study then being done
- “Residents of our city should be defining our special events, rather than letting our special events define us.”

### **III. Key West Survey on Tourism and the Community. Harris & Associates (December, 2004)**

Executive summary: Tourism is good, but not when citizens see that visitors start to intrude, “causing traffic jams, excessive noise, encroachment into residential neighborhoods and invasion of precious privacy....Perhaps the most worrisome impact is the possibility of further development to accommodate more tourists [and] buyers of seasonal vacation homes.... If a showdown were to take place over development...tourism could end up the whipping boy. Therefore, the tourism industry has a major stake in making sure such a showdown does not take place.... In fact, a successful resolution of the residential community’s quality of life concerns will most likely enhance the image of Key West as a highly desirable tourist destination.”

- 76% proud that KW is a tourist town—though 59% want tourism at then-current level
- “A solid 63%...say they would be inclined to support growth in tourism if the city commission would take positive action to preserve and improve the most treasured aspects of life in Key West”
- “86% say it is important to create preservation laws to protect” the character and uniqueness of KW—historic preservation important and on the other side, less tacky and more upscale tourism. “Above all, the public desires adoption of policies and strategies that respect and preserve the unique heritage and characteristics that distinguish Key West from other communities....”
- “73% say development, much related to tourism growth, ‘is a threat to Key West’s character and culture.’”
- 62% feel that the city usually or always favors tourist industry interests
- “93% want better job of keeping parks and streets safe and clean”

- “80% want ‘more and better public transportation’”; “56% say traffic congestion is getting worse”
- 80% more bicycle friendly
- “77% feel it is important ‘to promote art, theatre, museums, fine hotels and restaurants’”
- 66% noise reduction
- 74% want architectural codes to have ...store fronts and signage to fit the character of Key West.” And 65% want to regulate the visual clutter caused by commercial signs.
- The public’s confidence in the Commission: 58% either not too confident or not confident at all
- “89% want the City Commission ‘to give equal consideration to the concerns of residents and the tourist industry and to strike a reasonable balance between the two....”

Comment on ageing population: “without question... age is the most dynamic factor differentiating public opinion in Key West”. Not surprisingly, as we age, our thoughts about what we consider quality of life shift—what we want, where we want to live, what we want to buy.

**IV. City of Key West Citizen Survey. Key West City (July, 2004)**

41% response rate from sample of 1000 residents

- Could you have a say in how city government is run if you wanted to?
  - 40% yes
  - City government doing a good job? 8% excellent, 38% adequate , 35% somewhat adequate
  - Political leadership: 4% excellent, 10% more than adequate; 42% adequate, 35% inadequate
  - Top 5 priorities for preservation of quality of life in KW: (total of 24 priorities listed)
    - cost of housing
    - homeless
    - beach and swimming pollution
    - future water supply
    - cruise ship impact
  - Top 5 initiatives the City should undertake:
    - Cleaner ocean
    - Protection of the reef
    - Preservation of the beaches
    - Improvement in drinking water
    - Improved recycling

**V. Key West City Business and Economic Development Surveys. Key West City (July, 2004)**

33% return on sample of 200 businesses

1) Business men and women in Key West were not confident that the city, even with help from business, education, and community leaders, could successfully develop a viable economic development strategy. The challenges to be overcome, they said, were a lack of an agreed upon plan, the high cost of living in Key West, the lack of land, and lack of a skilled workforce.



- 2) If the city were to develop a plan, the two most important partners, these business people felt, were the business community itself and the county government.
- 3) If a successful plan could be developed, a majority felt that it was important to seek diversification in order to a) keep young people from leaving and b) in case of a downturn in tourism. Majorities also felt that diversification would c) help keep taxes in check and help with d) the overall quality of life in Key West.
- 4) Specific areas picked by a majority for diversification efforts include the arts, music, hospitality, and environmental protection.

**VI. Florida Defense Industry—Economic Impact Analysis. Naval Air Station Key West (2005), Vol. 3**, p. 30 lists 1,570 military personnel and 1,372 civilian personnel employed. Vol. 2, p. 104: direct DOD expenditures + multiplier effects (also termed “gross regional product”) for defense industry impact= \$592M; Keysnews (March 3, 2009) reported \$635 million for 2007. Strategic Planning Cmt. (SPC) note: The Florida Governor’s study estimated a \$2.8 Billion Monroe County economy for 2006; defense industry estimates would put “Defense” at 22.6% of the economy. Of the NOAA estimate of \$3.1 Billion economy, the defense industry would be 20.4%. Another view would be to compare total (direct) sales. Table 30 lists this figure in 2007 as \$348M. The NOAA estimate of total sales in the Keys is \$3.1B (2007-2008). This way of calculating would be a 11% contribution.

**VII. Study of the Impact of Condominium Conversions to The Florida Keys and Key West, TDC—Jessica Bennett (August 2005)**

SPC Note: The following data from this TDC study is included primarily as a demonstration that a sector of the market can change quickly with dramatic consequences for those who live in the Keys.

Following 9/11, tourism took a downturn and funding for hotels was hard to come by. But the “condominium component is an alternate way for developers to raise equity through the sale of units.”

“The demand for condo units created as part of lodging property conversions is really part of a larger drive for real estate as an investment...substantial increase over the past three years.”

“...Since 2002, 22% of all non-condo transient units county-wide have been...involved in some form of conversion to condo ownership.”

“650 existing campgrounds and RV spots will no longer be available...the county-wide loss is 30%. This has led to a “conversion of marinas throughout the Keys....Florida Keys residents will feel the loss of the publicly accessible marina space.” The docks are often packaged with condos and sold as “expensive seasonal homes.”

“...A wave of marina space converting to condo ownership that is not in conjunction with transient unit conversion redevelopment projects.”

**VIII. Economic Diversification Advance Planning for Monroe County, FL.**

Office of the Governor (August, 2006). This report provides a gross sales revenue (includes multiplier) figure for the military impact of \$463M\* or 16.5% of the economy and a tourism and military combined figure of \$1.8B, or a combined 57.5% of gross sales in the County.

This Advanced Planning report offers “27 strategic recommendations” for “economic diversification and growth”. The first recommendation is the “Formation of Lower Keys Economic Development Alliance” as well as “a more proactive approach to workforce training” (though a broader concept than envisioned in the Key West Strategic Plan).



\* includes pensions

### **IX. Study of Monroe County Tourism Workforce. (TDC)—Jessica Bennett (August, 2006)**

The TDC studied tourism worker satisfaction in Monroe County cited 114% turnover of employees in District 1 (Key West), though lower in other parts of the Keys and perhaps lower in the current economy.

- 1/4 earn <\$25K 1/4 @\$5-35K, 1/4 \$35-50, 1/4 >\$50 2/3 held one job p. e
- Being able to buy a house likely to influence a departing worker to stay
- 87% of those who left MC in 04-05 were workers
- Factors influencing a worker to stay: 1) increased pay 61% 2) afford housing, buy or rent 45% 3) able to purchase one's own home 45%, 4) promotion 44%, 5) increased in medical
- 56% of tourism employers do not offer medical
- 42% of lodging and 37% of bar/rest employ guest workers
- Cost of living in MC 13% above state average
- Education: no education requirement for job 38%, high school only 40%, voc-tec 14 % ; BA/BS 4% but most tourism workers have some college
- 1/4 of employers offer employee-assisted housing

The study concludes that increased “medical benefits, increased pay, and promotion are very likely to retain workers.” The TDC study emphasizes the large number of workers involved in this industry and their affect on the economy.

TDC staff comment: Affordable housing is the squeaky wheel to get attention; the core issue is cost of living compared to wages and salaries

SPC Note: not a part of this study, but TDC Executive Director Harold Wheeler told our committee in August 2010 that hospitality employees too often were deficient in the English language and often not well informed about either their own establishment or the local area.

SPC comment: From a variety of sources, for example the FIU study cited above and the Florida Legislature’s Office of Economic and Demographic Research, it is clear that what the latter terms “Leisure and Hospitality” is the lowest paying industry which they list (OEDR July 2010).

### **X. Key West High School: A Study of Current and Former Student Preferences in Living, Learning, and Making a Living Study. Johnston (June, 2007)**

In a study sponsored by then-Mayor McPherson to better understand why so many Key West High School graduates had left the city for good upon graduation, 2007 high school seniors and KWHS graduates from the prior 15 years (1991-2006)--of whom counselors, teachers and administrators had estimated 2/3 had left KW-- the top reason for those who had left was inadequate economic opportunity. For seniors, this was # 2 reason behind inadequate educational opportunities.

3% of the graduated respondents living in KW wanted to work in hospitality; 29% had BA/BS degree (apropos of IX above). The small sample makes these numbers unverifiable, but the low numbers of “local kids” working n hospitality is verified by many businesses and Census lists 28% of KW population with a BA/BS or grad degree.

SPC comment: it appears that many who wish to work and live in the Keys are overqualified (at least on paper) for the economy that we offer. Apparently these employees move on to seek other opportunities that offer more salary/benefits and challenges.

**XI. Monroe County, Florida Affordable Housing Needs Assessments. FIU (Rodel) (November, 2007)**

In a study sponsored by the Rodel Foundation, an FIU study focused on affordable housing but made the following observations regarding the general economy: "...in order to effectively develop local policies and strategies that address the demand for workforce housing, [Monroe County] **must first consider their larger economic development vision and goals....**" [bold added]

This passage went on to note that "...recent historical data strongly suggest that the Accommodation and Food Service sector will remain robust while the rest of the job market will be static.... It seems safe to assume that Accommodation and Food Service will continue to be the leading job creating sector of the economy for the foreseeable future...." But these occupations, the study noted, are "at the **bottom of the wage scale.**" [bold added]

Committee comment: The Committee's conclusion from this study was that without better paying jobs, worker satisfaction would remain problematic and high turnover would continue.

Elements that affect housing demand: growth/change in labor market, housing values, household income, and population and household composition. Monroe County "must first consider their larger economic development vision and goals."

Monroe Co wages are 9% below the remainder of Florida (2007) or \$35,620 and 46% of workforce in Accommodation/Food, Retail, Arts/Entertainment/Recreation, the "bottom of the wage scale", and this is seen to be the future growth sector of our econ

The recent demographic shifts are significant. 14% loss in 20-54 working age group, 15% increase in 55 and over. "The incoming retirees are more affluent than the younger population groups that have relocated.... U.S Census data that shows a 23% increase in Monroe County's median household income since 2000 and a 6% increase in per capita income" twice that of Miami, Broward and Palm Beach

**XII. City of Key West Worker Satisfaction Survey. Karen Larson (December, 2007)**

Karen Larson and Jessica Bennett (cited in Larson) declared in this worker satisfaction survey that 79-89% of those who worked in Key West (regardless of where they lived) were "housing cost burdened". As reported by Larson, the top concerns workers had for their own quality of life were inadequate salary (4.78 on a 5-point scale) and the personal cost of health care (4.64). (Note: the latter was tied -4.64--with the quality of life concern "cleanliness" of the city).

Overall ranking of the importance of issues to workers: Summary

1) affordability of living in Key West

2) upscale development and overdevelopment are changing the traditional character and culture of the island ; 75% perceived that upscale development was strongest threat to culture of KW. It is to our detriment to become less unique: one characterized the trend as “anywhere USA”

3) cleanliness of city streets, parks, beaches and water, and the environment in general; utilization of public spaces by the homeless.

4) local government, perceived to be overly responsive to development concerns and nonresponsive to the needs of locals; growing social polarization between the privileged and the struggling. Across administrations those in office more concerned with the rich than the workers; distrust of city gov’t

Larson’s conclusions: What is needed: 1) Leadership from government in developing a comprehensive plan for concerns facing the city and 2) mobilization of citizens to build community cohesion and pride—involve schools, churches, jail inmates, others can participate through donations or other support Community identity built around common cause”

### **XIII. Duval Street City Summit (January, 2008) and Duval Committee (2008- )**

The Mayor and a Commissioner called a city-wide summit to discuss the future of Duval. An estimated 200 residents participated in the discussions and subsequently a Duval Street Committee (volunteer, not Commission appointed) began work on the major topics brought up at the summit. The following represent the summit topics; the issue rankings were done by 17 persons on the committee (two or more items combined by SPC—within 5% of each other)

1. Trash can overflow
2. Security
2. Key West as an “ECO” Destination
4. Litter, Dirty Sidewalks and Recycling
4. Inviting Place for Locals
4. Vagrancy
7. Pornography, Drug Paraphernalia
8. Shade trees and beautification (combined by SPC)
9. Visual appearance: street lamps, benches, signs, public transportation on Duval and from Duval to other parts of the Island
10. HARC enforcement and Longer Stays for Cruise Ships

All above received 50% or more “Extremely important” or “Important” responses. Other items discussed at the summit but with lower ratings by the committee: bar-restaurant music (noise) motorcycle noise, lighting, open container enforcement, greeters for visitors, pedestrian mall, special tax on Duval for Duval, computer kiosks, scooter noise, auto congestion

### **XIV. Living Room Conversations (May, 2009)**

December of 2008 through May of 2009, Commissioner Johnston held a series of “Living Room Conversations” in small groups, totaling 57 Key West residents of Key West. (not a random selection)

Question: “What do you love about Key West?”

- o We are a caring community
- o We have a great diversity of people and thinking

- We are open to difference
- We are “just enough” weird, quirky and funky
- We have a wonderful sense of community
- We are creative and energetic
- We think that being interesting is more important than wearing fancy suits
- We easily mix across socio-economic and age differences
- We have great weather and spectacular natural beauty
- We are small and compact island that is great for walking/bicycling
- We have important and attractive historical architecture

Question: “What are your concerns?”

- We need to clean up our streets and “treat our island with more respect”
- Our cost of living may require us to “establish a living wage” and consider a “rent stabilization program” or other affordable rent initiatives
- We should reflect on tourism, which is an important source of revenue, but not a plus when it threatens our environment and “defines our very character”
- Consider how to better include persons with second homes who, though they contribute to taxes, also absorb housing stock and too often don’t integrate themselves into our community. They want the amenities, but “fine restaurants hotels and the arts cannot survive on a three-month season”
- Look again at the homeless who take advantage of “our soul as a community... they activate our sympathy” but give little back. “We love humaneness but it is our undoing”
- Our government can and should be a part of the solution in improving our community and economy, but has over the years created a credibility problem with citizens who complain about “who gets listened to”; “the development folks always get the ear [of city government].” Also, code enforcement is both inconsistent and insufficient.
- City planning receives too little attention with little inclination for “effective strategic planning”, leaving “special interests to hijack citizen consensus”
- We must work on what unites us; there is too often a cultural divide between New Town and Old Town residents
- Our city transportation needs complete rethinking. In the long run, parking has to be resolved through more reliance on public transportation and bicycle and pedestrian solutions
- Health care in Key West may be helped through federal action and maybe now is the opportunity to plan for the long term for our health care system
- Higgs Beach will need our constant care, support and attention
- The Truman Waterfront development seems all but intractable; we need to learn the issues as they appear now
- The ocean pollution and our deteriorating reefs are serious deterrents to Key West as an inviting place to live or visit
- What if... A) Cuba opens up? B) the military in Key West were to be substantially reduced?

**XV. Linking the Economy and Environment of the Florida Keys/Key West. National Oceanic and Atmospheric Administration, 2007-2008 (Published December, 2009-October 2010)**

This is a large study, but one set of data that may be of interest and importance concerns the following two lists:

Highly important but low satisfaction items for VISITORS in 2007-2008 in Monroe, including Key West (NOT rank order)

- Opportunity to view manatees, whales, dolphins, sea turtles
- Quality of beaches
- Shoreline access
- Designated swimming/beach areas
- Availability of public restrooms
- Value for price

Highly important but low satisfaction items for RESIDENTS in 2007-2008 in Monroe County, including Key West (NOT rank order)

- Amount of living coral
- Large numbers of fish
- Quality of beaches
- Shoreline access
- Condition of bike paths and sidewalks
- Availability of public restrooms
- Cleanliness of streets and sidewalks
- Uncrowded conditions
- Value for price

Activities Of Visitors And Residents, selected from three portions of the NOAA study:

- 1) Visitor Study: Selected Comparisons
- 2) Monroe County Resident Recreation: Selected Comparisons
- 3) Visitor Profiles For Key West Visitors

(The above three charts modified and combined in the chart below)

Activity	2008 Monroe County VISITOR Participation Rate 2008	2008 Monroe County RESIDENT Participation Rate 2008	Key West VISITOR Participation Rate 2008
Snorkeling	22%	35%	15%
SCUBA	5	12	3
Diving			
Fishing	13	40	7
Viewing	20	33	16
Wildlife-Nature Study			
Beach	28	27	25
Activities (including swimming)			
Sightseeing & Attractions (Paid & Unpaid)	45	22	60
Visiting Museums or Historic Areas	41	31	55

Cultural Events (Fairs, Concerts, Plays)	9	32	11
All Camping	2	4	2

**XVI. TDC: Visitor Profile Survey**  
**2008 Annual Report:**  
**December 2007-November 2008**

ALL Experiences & Activites Sought, (Monroe County) i.e. expectations for experiences during Keys vacation and activities Note: respondents may answer affirmative to multiple experiences	Percent	Rank 1-13
Relaxation and escape, de-stressing, reconnecting with friends and family	99.5%	1
Scuba	10	13
Fishing	13	12
Soft adventure, e.g. kayaking, snorkeling, wildlife, beaching	75	5
Culture & history, e.g. museums, historic architecture, cultural cuisine	88	2
Fine Arts & Performing Arts, e.g. theatre, art, music, crafts, film	69	8
Sunshine, i.e. warm, sunny, mild weather. A better climate	85	4
New experiences, i.e. to go somewhere new	75	6
Prestige, i.e.. high quality accommodations & tourism product cleanliness	87	3
Safety & Convenience, i.e. safe area, convenient to travel to	74	7
Value, i.e. a good value for the cost of trip. A bargain or special deal	66	9
Family, i.e. lots of things for a family to do, family friendly	20	11
Romance, i.e. romantic location to share with loved one or find new love	41	10

TDC: continued

Recreational activities (Monroe County) Note: respondents may answer affirmative to multiple experiences	Percentage who participated	Activity Rank
Diving	14%	10
Snorkeling	36	8
Fishing	17	9
Viewing wildlife	68	5
Boating	45	7
Beach	88	3
Dining out/Nightlife	99	1
Museum/Historic	82	4
Sightseeing/Attractions	97	2
Cultural Events	60	6
Wedding/Commitment	1	11

**XVII. Background data from Key West Comprehensive Plan, 2010**

Table 10

	Daily Average for 2008 (resident); 2009 for all others	Daily Average for March, 2008 (resident); 2009 for all others
Permanent Residents	22,364	22,364
Seasonal Residents	4,703	8,276
Commuters	5,315	5,315
Overnight Visitors	15,984	18,344
Visitors who Stay with Family/Friends	320	367
Day-trip Visitors	2,330	2,675
Cruise Ship Visitors	2,355	2,526
Total Average Daily Persons	53,371	59,867

\*Compiled data or estimated from a. Census, b. Tourist Development Council/Smith Travel Agency, c. NOAA, d. Labor Force estimates, e. KW Port Authority

**XVIII. Florida Legislative Office of Economic and Demographic Research, Monroe County, 2010**

As presented above, total sales is one way of viewing local economic impact of various “industry” classifications (see “Profile, VI, VII above) but a different way is to look at total salaries by industry. Seen this way, according to our state legislative Office of Economic and Demographic Research (OEDR July 2010), supplemented by Labor Statistic data, “Leisure and Hospitality” pays out 23.5% of total wages, government pays out 23.7% (not including uniformed military, education or health care workers), trade, transportation and utilities 16% and professional and business services 10.4% ...and so on in decreasing amounts.



## Nationwide Literature and Research

### **XIX. Rae, Douglas W. (2003). *City Urbanism and Its End*. New Haven: Yale University Press.**

“The irresistible fact [in this multi-year study of New Haven, Connecticut] ... was that government itself is a weak player in a larger system of power... The interesting questions in local government all ...turn on chains of decisions outside of ...city hall. “ Often city hall is all but powerless in the face of economic and demographic forces.

### **XX. Florida, Richard and Charlotta Mellander (2007). “There Goes the Neighborhood: How and Why Bohemians, Artists and Gays Affect Regional Housing Values.” Available at [creativeclass.com](http://creativeclass.com).**

In a number of cities, rents go up faster than wages, but demand nevertheless continues. The conclusion of several studies: amenities and lifestyle (entertainment, nightlife, culture) attract educated population who make more money who can pay more for housing

### **XXI. City of Vancouver, Washington, Strategic Plan, Updated 2008**

#### **XXii. Florida, Richard (2008). *Who’s Your City?* Basic Books, New York.**

115 The author asks: What is our jurisdictional advantage? That is, what are our “unique assets not easily replicated.”

138 two factors shape housing values 1) income—correlation to wealth, not to salaries and 2) Bohemian-Gay index (consistently). This is because 1) aesthetic-amenity premium and 2) tolerance or open culture premium

140 “Housing has become disconnected from local wealth-building, local productivity, and local economic development...key determinants of housing prices are income, human capital, and concentrations of bohemian or gay populations, rather than local wages or local occupations. Income, unlike wages, follows the person who owns it.”

163 There are five major categories of needs but two top the list: aesthetics and basic services with openness coming in a reasonable close third.” (Place and Happiness survey—27,000 respondents)

166 the “beauty premium.” “People are drawn to and pay more for that which is more aesthetically pleasing.”

168 “...it turns out that the ability to meet people and make friends is one of the most important factors in determining how happy we are with our communities.”

169 “There is a growing movement in cities around the world to invest in culture as a way of improving their reputations and spurring economic growth.”

176. “With every amount of tolerance extended to these groups (families with children, homeless, gays, seniors, below poverty etc) the overall happiness in the community increased... Many people are drawn to open communities on the

assumption that it is in those places where they can most easily be themselves.”  
[emphasis added]

282 today’s retirees are looking for something different (Wall Street Journal).  
“While weather and leisure remain important, retirees are looking for a  
community ‘where they can make friends and connections quickly, whether it’s a  
small town or a walkable neighborhood in a big city.”

**XXIII: Bishop, Bill (2008). The Big Sort: Why the Clustering of Like-Minded America is Tearing Us Apart. Boston: Houghton-Mifflin.**

202 “In an economy of extreme niche markets, location itself becomes a commodity.”

**XXIV: Florida, Richard (2010). The Great Reset. Harper Collins: New York.**

86. “The quality of life in the place we live is a key component of our happiness...” according to a Gallup survey, there are 3 key attributes: 1) physical beauty—great open spaces and parks, historic buildings, attention to community aesthetics, 2) ease with which people can meet others, make friends, and plug into social networks. 3) level of diversity, open-mindedness, and acceptance: is there equality of opportunity? Can everyone contribute? These things are organic in nature and require leadership and active engagement of the community. [emphasis added]

120”...service jobs offer lots of potential for innovation, entrepreneurship, and the upgrading of employment opportunities.... Restaurants, child care services, landscaping companies, new marketing and delivery services for everything from home-cooked meals to in-home technology consultants.” [see note p.137]

121 we need “to make service jobs even more innovative, more productive, and higher paying. We cannot stop until they pay better and afford a better way of life than manufacturing jobs did for a couple of previous generations.... People want to learn, to develop new competencies....”

124. “Because the service sector employs so many people and contributes so significantly to the economy, we have little choice but to make these jobs more desirable and more emotionally and financially rewarding.”

127. “We can’t give up on service jobs, which are among the fastest-growing of all jobs.”

129. “No economic system is entirely, or simply, about money. Economic systems reflect the way people choose to live and the way societies see themselves.”

161. “60% of Americans ...(2005) said they want to live in walkable communities with shops, restaurants, movie theatres, schools and churches nearby.”

**XV: Alexandria (Virginia) City Council Strategic Plan, Adopted 2004, Revised 2010**

**Attachment III  
Data and References by Domain**

**The Economy**

[Edited from “All Data and References”]

The General Demographic and Economic Profile is Followed by References in Chronological Order; National Studies/Books Follow Local Studies

**Introduction. A Profile Of Change**

Summary Table of Demographic and Income Change

	Permanent Residents (2000 to 2006-2009*)	Seasonal Residents (2000 to 2006-2008)	Visitors*** (1998 to 2008)
Number of People	(1**) – 12% (KW 2009 only)	(2) + 57% (KW)	(3) – 14% (MC = all of Monroe County)
Median Age	(4) + 6% (KW)	(5) + (see note re: this cell) (KW)	(6) + 6% (MC)
Income	(7) + 22% (KW)	(8) + (see note re: this cell) (KW)	(9) + 35% (MC)

\*\* 2006-2009\* is a 4-year Census estimate made in 2010

Total Number of Visitors (person days) and Visitor Spending in Key West by Means of Access\*

Means of Travel	Total Visitor Number	Percent of Total Visitor Number	Total Visitor Spending	Percent of Total Visitor Spending
Auto: Overnight	3.32M	55%	\$569M	54%
Auto: Day Trip	.48M	8%	\$48M	5%
Air	1.3M	22%	\$343M	33%
Cruise Ship	.74M**	12%	\$62M	6%
Ferry	.2M	3%	\$23M	2%

\*Source of data: NOAA; calculations for this table by Strategic Planning Committee.

\*\*Source City of Key West Port Operations; NOAA cruise figure is .3% lower. All figures based on December 2007-November 2008 data

**I. Vision 2020. Key West Chamber of Commerce (1998, updates 2004, 2008 incomplete).**

- Expanded 10-month tourist season
- Viable seafood industry
- 

**II. Key West Resident/Visitor Planning Committee Report (November, 2004).**

- tourism is principal source of income, but passive income is significant
- The Resident/Visitor Committee made several economic recommendations:
- market Key West as a boutique conference opportunity;
  - assure that whomever is marketing Key West does so in a way “that is indicative of our pride in our community.”; and
  - “enable the creation of a wireless internet service”.

- High turnover of population affects businesses in staffing and “affects the civic fabric of our communities in countless ways.” New residents come in who are unaware of ordinances and community standards
- “Residents of our city should be defining our special events, rather than letting our special events define us.”

### **III. Key West Survey on Tourism and the Community. Harris & Associates (December, 2004)**

Executive summary: Tourism is good, but not when citizens see that visitors start to intrude, “causing traffic jams, excessive noise, encroachment into residential neighborhoods and invasion of precious privacy....Perhaps the most worrisome impact is the possibility of further development to accommodate more tourists [and] buyers of seasonal vacation homes.... If a showdown were to take place over development...tourism could end up the whipping boy. Therefore, the tourism industry has a major stake in making sure such a showdown does not take place.... In fact, a successful resolution of the residential community’s quality of life concerns will most likely enhance the image of Key West as a highly desirable tourist destination.”

- 76% proud that KW is a tourist town—though 59% want tourism at then-current level
- “A solid 63%...say they would be inclined to support growth in tourism if the city commission would take positive action to preserve and improved the most treasured aspects of life in Key West”
- “73% say development, much related to tourism growth, ‘is a threat to Key West’s character and culture.’”

### **V. Key West City Business and Economic Development Surveys. Key West City (July, 2004)**

- Business men and women in Key West were not confident that the city, even with help from business, education, and community leaders, could successfully develop a viable economic development strategy. The challenges to be overcome, they said, were a lack of an agreed upon plan, the high cost of living in Key West, the lack of land, and lack of a skilled workforce.
- If the city were to develop a plan, the two most important partners, these business people felt, were the business community itself and the county government.
- If a successful plan could be developed, a majority felt that it was important to seek diversification in order to a) keep young people from leaving and b) in case of a downturn in tourism. Majorities also felt that diversification would c) help keep taxes in check
- Specific areas picked by a majority for diversification efforts include the arts, music, hospitality, and environmental protection.

**VI. Florida Defense Industry—Economic Impact Analysis. Naval Air Station Key West (2005), Vol. 3, p. 30** lists 1,570 military personnel and 1,372 civilian personnel employed. Vol. 2, p. 104: direct DOD expenditures + multiplier effects (also termed “gross regional product”) for defense industry impact= \$592M; Keysnews (March 3, 2009) reported \$635 million for 2007. Strategic Planning Cmt. (SPC) note: The Florida

Governor's study estimated a \$2.8 Billion economy for 2006; defense industry estimates would put this at 22.6% of the economy. Of the NOAA estimate of \$3.1 Billion economy, the defense industry would be 20.4%.

Another view would be to compare total (direct) sales. Table 30 lists this figure in 2007 as \$348M. The NOAA total sales in the Keys is \$3.1B (2007-2008). This way of calculating would be a 11% contribution.

#### **VII. Study of the Impact of Condominium Conversions to The Florida Keys and Key West, TDC—Jessica Bennett (August 2005)**

- SPC Note: The following data from this TDC study is included primarily as a demonstration that a sector of the market can change quickly with dramatic consequences for those who live in the Keys.
- Following 9/11, tourism took a downturn and funding for hotels was hard to come by. But the "condominium component is an alternate way for developers to raise equity through the sale of units."
- "The demand for condo units created as part of lodging property conversions is really part of a larger drive for real estate as an investment...substantial increase over the past three years."
- "...Since 2002, 22% of all non-condo transient units county-wide have been...involved in some form of conversion to condo ownership."

#### **VIII. Economic Diversification Advance Planning for Monroe County, FL.**

- Office of the Governor (August, 2006). This report provides a gross sales revenue (includes multiplier) figure for the military impact of \$463M\* or 16.5% of the economy and a tourism and military combined figure of \$1.8B, or a combined 57.5% of gross sales in the County.
- This Advanced Planning report offers "27 strategic recommendations" for "economic diversification and growth". The first recommendation is the "Formation of Lower Keys Economic Development Alliance" as well as "a more proactive approach to workforce training" (though a broader concept than envisioned in the Key West Strategic Plan).
- includes pensions

#### **IX. Study of Monroe County Tourism Workforce. TDC—Jessica Bennett (August, 2006)**

The TDC studied tourism worker satisfaction in Monroe County cited 114% turnover of employees in District 1 (Key West) and though lower in other parts of the Keys and likely lower in the current economy.

- 1/4 earn <\$25K 1/4 @\$5-35K, 1/4 \$35-50, 1/4 >\$50 2/3 held one job
- Being able to buy a house likely to influence a departing worker to stay
- 87% of those who left MC in 04-05 were workers
- factors influencing a worker to stay: 1) increased pay 61% 2) afford housing buy or rent 45% 3) able to purchase one's own home 45%, 4) promotion 44%, 5) increased in medical
- 56% of tourism employers do not offer medical
- 42% of lodging and 37% or bar/rest employ guest workers
- Cost of living in MC 13% above state average

- Education: no education requirement for job 38%, high school only 40%, voc-tec 14 % ; BA/BS 4% p. 41 but most tourism workers have some college
- 1/4 of employers offer employee-assisted housing

**X. Key West High School: A Study of Current and Former Student Preferences in Living, Learning, and Making a Living Study. Johnston (June, 2007)**

- the top reason for (past graduates and current seniors leaving the Keys) was inadequate economic opportunity. For seniors, this was # 2 reason behind inadequate educational opportunities.
- 3% of the graduated (1990-2006) respondents living in KW wanted to work in hospitality; 29% had BA/BS degree (apropos of IX above).

**XI. Monroe County, Florida Affordable Housing Needs Assessments. FIU (Rodel) (November, 2007)**

- "...recent historical data strongly suggest that the Accommodation and Food Service sector will remain robust while the rest of the job market will be static.... It seems safe to assume that Accommodation and Food Service will continue to be the leading job creating sector of the economy for the foreseeable future...." But these occupations, the study noted, are "at the bottom of the wage scale."

**XIV. Living Room Conversations (May, 2009)**

Question: "What are your concerns?"

- Our cost of living may require us to "establish a living wage" and consider a "rent stabilization program" or other affordable rent initiatives
- We should reflect on tourism, which is an important source of revenue, but not a plus when it threatens our environment and "defines our very character"

**XV. Linking the Economy and Environment of the Florida Keys/Key West. National Oceanic and Atmospheric Administration (December, 2009-October 2010)**

- Highly important but low satisfaction items for VISITORS:
  - Value for Price\*
- Highly important but low satisfaction items for RESIDENTS dissatisfaction:
  - Value for price

[\*This item singled out here only because it deals with the economy—many points of high satisfaction and other points of dissatisfaction dealing with total experience in the Keys. See General Appendix]

**XVIII. State Legislative Office of Economic and Demographic Research, Monroe County, July, 2010**

- total salaries paid by each industry in Monroe County, OEDR and Labor Statistic data show that "Leisure and Hospitality" pays out 23.5% of total wages, government pays out 23.7% (not including uniformed military, education or health care workers), trade, transportation and utilities 16% and professional and business services 10.4% ...and so on in decreasing amounts.

**XXII. Florida, Richard (2008). Who's Your City? Basic Books, New York.**

- The author asks: What is our jurisdictional advantage? That is, what are our "unique assets not easily replicated."

- There are five major categories of needs but two top the list: aesthetics and basic services with openness coming in a reasonable close third.” 166 the “beauty premium.” “People are drawn to and pay more for that which is more aesthetically pleasing.”
- “There is a growing movement in cities around the world to invest in culture as a way of improving their reputations and spurring economic growth.”

**XXIII. Bishop, Bill (2008). The Big Sort: Why the Clustering of Like-Minded America is Tearing Us Apart. Boston: Houghton-Mifflin.**

- “In an economy of extreme niche markets, location itself becomes a commodity.”

**XXIV. Florida, Richard (2010). The Great Reset. Harper Collins: New York.**

- Service jobs offer lots of potential for innovation, entrepreneurship, and the upgrading of employment opportunities.... Restaurants, child care services, landscaping companies, new marketing and delivery services for everything from home-cooked meals to in-home technology consultants.”
- We need “to make service jobs even more innovative, more productive, and higher paying. We cannot stop until they pay better and afford a better way of life than manufacturing jobs did for a couple of previous generations.... People want to learn, to develop new competencies....”
- “Because the service sector employs so many people and contributes so significantly to the economy, we have little choice but to make these jobs more desirable and more emotionally and financially rewarding.”
- “We can’t give up on service jobs, which are among the fastest-growing of all jobs.”



## The Environment

[Edited from “All Data and References”]

References in Chronological Order; National Studies/Books Follow Local Studies

### **I. Vision 2020. Key West Chamber of Commerce (1998, updates 2004, 2008 incomplete).**

- one of the “cleanest small cities in America”
- southside beaches restored and accessible

### **II. Key West Resident/Visitor Planning Committee Report (November, 2004).**

- climate, environment, water, history, diversity, lifestyle are all valued
- marine environment important
- history and historic buildings are our legacy and need to be preserved
- “Assure a sustainable environment” for our economy (noted as tourism based but “passive income” is a significant secondary component...)”)
- Land, park, beach care
- Visual environment awareness
- City cleanliness
- Historic preservation
- Tree canopy

### **III. Key West Survey on Tourism and the Community. Harris & Associates (December, 2004)**

- “86% say it is important to create preservation laws to protect” the character and uniqueness of KW—historic preservation important and on the other side, less tacky and more upscale tourism. “Above all, the public desires adoption of policies and strategies that respect and preserve the unique heritage and characteristics that distinguish Key West from other communities....”
- “93% want better job of keeping parks and streets safe and clean”
- 66% noise reduction
- 74% want architectural codes to have ...store fronts and signage to fit the character of Key West.” And 65% want to regulate the visual clutter caused by commercial signs.

### **IV. City of Key West Citizen Survey. Key West City (July, 2004)**

- priorities for preservation of quality of life in KW: (total of 24 priorities listed)
  - beach and swimming pollution
  - future water supply
  - cruise ship impact
- initiatives the City should undertake:
  - Cleaner ocean
  - Protection of the reef
  - Preservation of the beaches
  - Improvement in drinking water
  - Improved recycling



**XII. City of Key West Worker Satisfaction Survey. Karen Larson (December, 2007)**

- Overall ranking of the importance of issues to workers:  
#3) cleanliness of city streets, parks, beaches and water, and the environment in general; utilization of public spaces by the homeless.

**XIII. Duval Street City Summit (January, 2008) and Duval Committee**

Rankings of issues:

- #1. Trash can overflow
2. Key West as an “ECO” Destination
4. Litter, Dirty Sidewalks and Recycling
8. Shade trees and beautification (combined by SPC)
9. Visual appearance: street lamps, benches, signs, public transportation on Duval and from Duval to other parts of the Island
10. HARC enforcement

**XIV. Living Room Conversations (May, 2009)**

“What are your concerns?”

- We need to clean up our streets and “treat our island with more respect”
- The ocean pollution and our deteriorating reefs are serious deterrents to Key West as an inviting place to live or visit

**XV. Linking the Economy and Environment of the Florida Keys/Key West. National Oceanic and Atmospheric Administration (December, 2009-October 2010)**

Highly important but low satisfaction items for VISITORS in 2007-2008 in Monroe, including Key West (NOT rank order)

- Opportunity to view manatees, whales, dolphins, sea turtles
- Quality of beaches
- Shoreline access
- Designated swimming/beach areas

Highly important but low satisfaction items for RESIDENTS in 2007-2008 in Monroe County, including Key West (NOT rank order)

- Amount of living coral
- Large numbers of fish
- Quality of beaches
- Shoreline access
- Condition of bike paths and sidewalks
- Availability of public restrooms
- Cleanliness of streets and sidewalks

Activities Of Visitors And Residents, selected from three portions of the NOAA study: SEE GENERAL APPENDIX for TDC listing with similar emphasis on environmentally-related items

Activity	2008 Monroe County VISITOR Participation Rate 2008	2008 Monroe County RESIDENT Participation Rate 2008	Key West VISITOR Participation Rate 2008
Snorkeling	22%	35%	15%
SCUBA Diving	5	12	3
Fishing	13	40	7
Viewing	20	33	16
Wildlife-Nature			

Study Beach Activities (including swimming)	28	27	25
Sightseeing & Attractions (Paid & Unpaid)	45	22	60
Visiting Museums or Historic Areas	41	31	55
Cultural Events (Fairs, Concerts, Plays)	9	32	11
All Camping	2	4	2

**XXII. Florida, Richard (2008). Who’s Your City? Basic Books, New York.**

- the “beauty premium.” “People are drawn to and pay more for that which is more aesthetically pleasing.”

**XXIV. Florida, Richard (2010). The Great Reset. Harper Collins: New York.**

- Gallup survey, indicates key attributes: 1) physical beauty—great open spaces and parks, historic buildings, attention to community aesthetics,
- “60% of Americans ...(2005) said they want to live in walkable communities with shops, restaurants, movie theatres, schools and churches nearby.”

## Culture

[Edited from “All Data and References”]

References in Chronological Order; National Studies/Books Follow Local Studies

### **I. Vision 2020. Key West Chamber of Commerce (1998, updates 2004, 2008 incomplete).**

Goal 4 we will have protected and enhanced our culture—America’s Caribbean Island  
Goal 5 one of the “cleanest small cities in America”

### **II. Key West Resident/Visitor Planning Committee Report (November, 2004)**

- “Preserve and enhance the uniqueness of KW”
- Visual environment awareness
- City cleanliness
- Historic preservation
- “Residents of our city should be defining our special events, rather than letting our special events define us.” P.12

### **III. Key West Survey on Tourism and the Community. Harris & Associates (December, 2004)**

- “86% say it is important to create preservation laws to protect” the character and uniqueness of KW—historic preservation important and on the other side, less tacky and more upscale tourism. 73% say development is threat to KW character and culture and 52% say development is worsening quality of life “Above all, the public desires adoption of policies and strategies that respect and preserve the unique heritage and characteristics that distinguish Key West from other communities....”
- “77% feel it is important ‘to promote art, theatre, museums, fine hotels and restaurants’”
- 66% noise reduction
- 74% want architectural codes to have ...store fronts and signage to fit the character of Key West.” And 65% want to regulate the visual clutter caused by commercial signs.
- Harris: 77% favor “cultural tourism” and“...public desire to make Key West a little more toney, a little less tacky, a little less raunchy.”
- Harris: upscale development is a threat to Key West culture

### **V. Key West City Business and Economic Development Surveys. Key West City (July, 2004)**

- Specific areas picked by a majority for diversification efforts include the arts, music, hospitality, and environmental protection.

### **XII. City of Key West Worker Satisfaction Survey. Karen Larson (December, 2007)**

2) upscale development and overdevelopment are changing the traditional character and culture of the island ; 75% perceived that upscale development was strongest threat to culture of KW p.17. It is to our detriment to become less unique: one characterized the trend as “anywhere USA” p.21

**XIV. Living Room Conversations (May, 2009)**

- We are a caring community
- We have a great diversity of people and thinking
- We are open to difference
- We are “just enough” weird, quirky and funky
- We have a wonderful sense of community
- We are creative and energetic
- We think that being interesting is more important than wearing fancy suits
- We easily mix across socio-economic and age differences
- We have important and attractive historical architecture

**XV. Linking the Economy and Environment of the Florida Keys/Key West. National Oceanic and Atmospheric Administration (December, 2009-October 2010)**

See **Attachment II** for specific participation rates. It is clear from both the NOAA study as well as the TDC data that cultural and historical sights are the most popular activities for visitors

**XX. Richard Florida and Charlotta Mellander (2007). “There Goes the Neighborhood: How and Why Bohemians, Artists and Gays Affect Regional Housing Values.” Available at [creativeclass.com](http://creativeclass.com).**

- in a number of cities, rents go up faster than wages, but demand nevertheless continues. The conclusion of several studies: amenities and lifestyle (entertainment, nightlife, culture) attract educated population who make more money who can pay more for housing

**XXII. Richard Florida . Who’s Your City? Basic Books, New York, 2008**

- what is our (KW) jurisdictional advantage “unique assets not easily replicated.” [emphasis added]
- wealth attracts wealth but amenities are important to keeping wealth (136) and in fact “amenities, not high incomes, explain higher housing values.” 2007 Business Week: “Bohemian Today High Rent Tomorrow.”(137)
- two factors shape housing values 1) income—correlation to wealth, not to salaries and 2) Bohemian-Gay index (consistently). This is because 1)aesthetic-amenity premium and 2) tolerance or open culture premium
- ...key determinants of housing prices are income, human capital, and concentrations of bohemian or gay populations....
- Five major categories of needs: 1) physical and economic security, 2) basic services (e.g., schools, health care, housing), and... 5) aesthetics.” While all five factors play important roles, two top the list: aesthetics and basic services with openness coming in a reasonable close third.”
- the “beauty premium.” “People are drawn to and pay more for that which is more aesthetically pleasing.”
- “...it turns out that the ability to meet people and make friends is one of the most important factors in determining how happy we are with our communities.”
- “There is a growing movement in cities around the world to invest in culture as a way of improving their reputations and spurring economic growth.”

- “Many people are drawn to open communities on the assumption that it is in those places where they can most easily be themselves.” [emphasis added]
- “... the bar has been raised” aesthetics and openness have proven to be needs—not just frills
- today’s retirees are looking for something different (Wall Street J). “While weather and leisure remain important, retirees are looking for a community ‘where they can make friends and connections quickly, whether it’s a small town or a walkable neighborhood in a big city.”

**XXIII. Bishop, Bill (2008). The Big Sort: Why the Clustering of Like-Minded America is Tearing Us Apart. Boston: Houghton-Mifflin.**

- In an economy of extreme niche markets, location itself becomes a commodity

**XXIV. Richard Florida (2010). The Great Reset. Harper Collins: New York**

- “The quality of life in the place we live is a key component of our happiness...” according to Gallup. 3 key attributes: 1) physical beauty—great open spaces and parks, historic buildings, attention to community aesthetics, 2) ease with which people can meet others, make friends, and plug into social networks. 3) level of diversity, open-mindedness, and acceptance: is there equality of opportunity? Can everyone contribute? These things are organic in nature and require leadership and active engagement of the community.
- “But 60% of Americans ...(2005) said they want to live in walkable communities with shops, restaurants, movie theatres, schools and churches nearby.”

## Infrastructure

[Edited from "All Data and References"]  
References are in Chronological Order

### **I. Vision 2020. Key West Chamber of Commerce (1998, updates 2004, 2008 incomplete).**

- a walkable and bikeable island
- infrastructure improved (communications, power, water, sewer, city buildings...power underground)

### **III. Key West Survey on Tourism and the Community. Harris & Associates (December, 2004)**

- "93% want better job of keeping parks and streets safe and clean"
- "80% want 'more and better public transportation"; "56% say traffic congestion is getting worse"

### **XIII. Duval Street City Summit (January, 2008) and Duval Committee**

- Visual appearance: street lamps, benches, signs, public transportation on Duval and from Duval to other parts of the Island

### **XIV. Living Room Conversations (May, 2009)**

- Our city transportation needs complete rethinking. In the long run, parking has to be resolved through more reliance on public transportation and bicycle and pedestrian solutions

### **XV. Linking the Economy and Environment of the Florida Keys/Key West. National Oceanic and Atmospheric Administration (December, 2009-October 2010)**

- Highly important but low satisfaction items for VISITORS:
  - Availability of public restrooms
- Highly important but low satisfaction items for RESIDENTS:
  - Availability of public restrooms

## Government

[Edited from "All Data and References"]

References in Chronological Order; National Studies/Books Follow Local Studies

### **Introduction. SPC summary of A Profile Of Change**

Effective public decision-making regarding the future requires knowledge of the trends that are shaping our economy and society. The key points for governing include understanding that our resident population has declined while our seasonal resident population has increased. It is significant also that our resident population has become older at twice the rate as the U.S. as a whole. And it has also become more wealthy. At the same time, our visitor population has followed a similar trend in having declined and become older and more wealthy. As the Harris survey suggested, such trends have implications for what residents expect of government and as NOAA and TDC data indicate, there are clear trends for what visitors expect from a visit to the Keys. Finally, of singular importance, the percentage of income from Monroe County residents that is not dependent on the local economy is nearly double that of the national average. Of consequence to the future of Key West is that many residents and of course all visitors have options about where to live and visit.

### **I. Vision 2020. Key West Chamber of Commerce (1998, updates 2004, 2008 incomplete).**

- cost of government effectively managed and % of local revenue for government from property tax reduced
- better relationship between government and citizens

### **III. Key West Survey on Tourism and the Community. Harris & Associates (December, 2004)**

- "86% say it is important to create preservation laws to protect" the character and uniqueness of KW [italics added]
- "Above all, the public desires adoption of policies and strategies that respect and preserve the unique heritage and characteristics that distinguish Key West from other communities...." [italics added]
- 62% feel that the city [government] usually or always favors tourist industry interests
- The public's confidence in the Commission: 58% either not too confident or not confident at all
- "89% want the City Commission 'to give equal consideration to the concerns of residents and the tourist industry and to strike a reasonable balance between the two....'" [italics in original]

### **IV. City of Key West Citizen Survey. Key West City (July, 2004)**

- Could you have a say in how city government is run if you wanted to? [40% yes]
- City government doing a good job? [8% excellent, 38% adequate, 35% somewhat adequate]
- Political leadership: [4% excellent, 10% more than adequate; 42% adequate, 35% inadequate]

**V. Key West City Business and Economic Development Surveys. Key West City (July, 2004)**

- Business men and women in Key West were not confident that the city... could successfully develop a viable economic development strategy. The challenges ... were a lack of an agreed upon plan....
- If the city were to develop a plan, the two most important partners... were the business community itself and the county government.

**XII. City of Key West Worker Satisfaction Survey. Karen Larson (December, 2007)**

- Local government is perceived to be overly responsive to development concerns and nonresponsive to the needs of locals. There is therefore a growing social polarization between the privileged and the struggling. Across administrations those in office have been more concerned with the rich than the workers, and there is an over-all distrust of city government.

**XIV. Living Room Conversations (May, 2009)**

Question: "What are your concerns [about Key West]?"

- Our government can and should be a part of the solution in improving our community and economy, but has over the years created a credibility problem with citizens who complain about "who gets listened to"; "the development folks always get the ear [of city government]."
- Code enforcement is both inconsistent and insufficient.
- City planning receives too little attention with little inclination for "effective strategic planning", leaving "special interests to hijack citizen consensus"

**XVII. Background data from Key West Comprehensive Plan, 2010 [Table 10]**

	Daily Average for 2008 (resident); 2009 for all others	Daily Average for March, 2008 (resident); 2009 for all others
Permanent Residents	22,364	22,364
Seasonal Residents	4,703	8,276
Commuters	5,315	5,315
Overnight Visitors	15,984	18,344
Visitors who Stay with Family/Friends	320	367
Day-trip Visitors	2,330	2,675
Cruise Ship Visitors	2,355	2,526
Total Average Daily Persons	53,371	59,867

\*Compiled data or estimated from a. Census, b. Tourist Development Council/Smith Travel Agency, c. NOAA, d. Labor Force estimates, e. KW Port Authority

**XIX. Rae, Douglas W. (2003). City Urbanism and Its End. New Haven: Yale University press.**

"The irresistible fact [in this multi-year study of New Haven, Connecticut] ... was that government itself is a weak player in a larger system of power.... The interesting



questions in local government all ...turn on chains of decisions outside of ...city hall. “  
Often city hall is all but powerless in the face of economic and demographic forces.

## Quality of Life

[Edited from "All Data and References"]

References in Chronological Order; National Studies/Books Follow Local Studies

### **I. Vision 2020. Key West Chamber of Commerce (1998, updates 2004, 2008 incomplete).**

- Opportunities for youth improved
- The Chamber sought to achieve "the goal of no more than one third of [worker] income...necessary to fund housing."

### **II. Key West Resident/Visitor Planning Committee Report (November, 2004).**

- Belief that residential neighborhoods are important
- Need to protect housing we now have and create new units, for example, near jobs so employees don't need to have a car
- Parks "should not be allowed to become homeless safe zones."
- Other recommendations:
  - City cleanliness
  - Affordable housing
  - Address Homeless problems
- High turnover of population affects businesses in staffing and "affects the civic fabric of our communities in countless ways." New residents come in who are unaware of ordinances and community standards

### **IV. City of Key West Citizen Survey. Key West City (July, 2004)**

- Priorities for preservation of quality of life in KW: (total of 24 priorities listed)
  - cost of housing (#1)
  - homeless

### **IX. Study of Monroe County Tourism Workforce. TDC—Jessica Bennett (August, 2006)**

- Being able to buy a house likely to influence a departing worker to stay
- Medical benefits and merit raises as incentives, MC employers have found are most successful in fulfilling staffing needs; factors influencing a worker to stay: 2) affordable housing to buy or rent 45% 3) able to purchase one's own home 45%, 5) increased in medical
- 56% of tourism employers do not offer medical
- Education: no education requirement for job 38%, high school only 40%, voc-tec 14 % ; BA/BS 4% but most tourism workers have some college
- 1/4 of employers offer employee-assisted housing
- The study concludes that increased "medical benefits... very likely to retain workers."
- 

### **XI. Monroe County, Florida Affordable Housing Needs Assessments. FIU (Rodel) (November, 2007)**

- "In order to effectively develop local policies and strategies that address the demand for workforce housing, [Monroe County] must first consider their larger economic development vision and goals...."

- “Recent historical data strongly suggest that the Accommodation and Food Service sector will remain robust while the rest of the job market will be static.... It seems safe to assume that Accommodation and Food Service will continue to be the leading job creating sector of the economy for the foreseeable future....” But these occupations, the study noted, are “at the bottom of the wage scale.”
- SPC summary: This wage structure, coupled with large numbers of older people moving into Monroe County with more money (though apparently not in wage or salaried jobs) than average workers has boosted home buying and rental prices well beyond the designated level needed for workers and others to qualify for affordable housing. This has set up an intractable problem in providing sufficient affordable housing.

#### **XII. City of Key West Worker Satisfaction Survey. Karen Larson (December, 2007)**

- 79-89% of those who worked in Key West (regardless of where they lived) were “housing cost burdened”. As reported by Larson, the top concerns workers had for their own quality of life included the personal cost of health care.
- Employees want higher salaries/wages, do not want “employee housing”;
- Larson concluded: need for mobilization of citizens to build community cohesion and pride—involve schools, churches, jail inmates, others can participate through donations or other support Community identity built around common cause”.

#### **XIV. Living Room Conversations (May, 2009)**

What are your concerns?

- Our cost of living may require us to “establish a living wage” and consider a “rent stabilization program” or other affordable rent initiatives
- Consider how to better include persons with second homes who, though they contribute to taxes, also absorb housing stock and too often don’t integrate themselves into our community.
- Look again at the homeless who take advantage of “our soul as a community... they activate our sympathy” but give little back. “We love humaneness but it is our undoing”
- Health care in Key West may be helped through federal action and maybe now is the opportunity to plan for the long term for our health care system

#### **XXII. Florida, Richard (2008). Who’s Your City? Basic Books, New York.**

- “Housing has become disconnected from local wealth-building, local productivity, and local economic development...key determinants of housing prices are income, human capital, and concentrations of bohemian or gay populations, rather than local wages or local occupations.
- Five major categories of needs include: 1) physical and economic security, 2) basic services (e.g., schools, health care, housing),” While all five factors play important roles, two top the list: aesthetics and basic services.”
- “It turns out that the ability to meet people and make friends is one of the most important factors in determining how happy we are with our communities.”
- Today’s retirees are looking for something different (Wall Street Journal). “While weather and leisure remain important, retirees are looking for a community ‘where they can make friends and connections quickly, whether it’s a small town or a walkable neighborhood in a big city.’”

**XXIV: Florida, Richard (2010). The Great Reset. Harper Collins: New York.**

- "...service jobs offer lots of potential for innovation, entrepreneurship, and the upgrading of employment opportunities.... Restaurants, child care services, landscaping companies, new marketing and delivery services for everything from home-cooked meals to in-home technology consultants."
- We need "to make service jobs even more innovative, more productive, and higher paying. We cannot stop until they pay better and afford a better way of life than manufacturing jobs did for a couple of previous generations.... People want to learn, to develop new competencies...."
- "Because the service sector employs so many people and contributes so significantly to the economy, we have little choice but to make these jobs more desirable and more emotionally and financially rewarding."
- "We can't give up on service jobs, which are among the fastest-growing of all jobs."