

Map 2-H

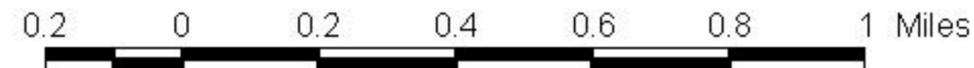
Navarre Beach Parcel Specific Wetlands and Marsh Map



Legend

- Parcel Lines
- Intertidal Wetlands
- Adjacent Wetlands
- Potential Plover Habitat
- Potential Sea Turtle/Plover Habitat
- Primary Dune Zone

Data Obtained by Visual Analysis of Aerial Photography. Presented as documentation for Land Use Planning Analysis for the 2000-2020 Comprehensive Plan. ONLY



Community Planning, Zoning and Development Division
September, 2001

It is noted that resources are mapped for all parcels, developed or undeveloped. Also, as previously indicated, the potential habitat areas may or may not be actually used by a protected species. ***The only way to accurately and scientifically determine the extent of use, if any, by such species is to conduct a 12 to 24 month study on specific areas.***

Subsection 2.F.7: Inventory of State, Federal, and Local Regulatory Programs

Appendix 2 – Regulations and Agencies Governing Activities in the Coastal Area, of this Plan, provides an overview of all applicable state and federal regulatory programs.

Section 2.G: Economic Impact of Tourism in Santa Rosa County

In 2000 a report titled *Tourism Impact on the Santa Rosa County Economy* was prepared by the Haas Center for Business Research and Economic Development at the University of West Florida. This report provides estimates of the local economic impact attributable to the tourism industry in Santa Rosa County. Findings of this study are that the approximately 202,050 overnight parties that visit Santa Rosa County each year: generate approximately \$82 million in inter-industry sales and purchases locally; result in the creation of about 1,276 jobs that are directly or indirectly related to tourism; generate local incomes and wages of approximately \$21 million annually; generate annual state and local tax revenues of approximately \$3,394,045.

These economic impacts are the result of both visitor spending and the construction and maintenance of seasonal housing and tourism related facilities. Tourist spending for lodging, restaurants, shopping, entertainment and other goods and services injects about \$38 million in direct spending into the local economy. When the total impact of the Santa Rosa County tourism industry is considered (taking the “multiplier effect” into account), approximately \$48 million in total spending is generated each year in the

region. About 819 jobs are directly or indirectly supported by tourist spending in the regional economy along with incomes to area workforce totaling approximately \$12 million.

The construction and maintenance of seasonal housing and tourism related facilities generates approximately \$34 million in additional annual inter-industry sales and purchases, which includes \$9.2 million in incomes and supports 457 jobs.

Tourism related spending impacts are seen primarily in the construction, retail trade, hotel and lodging, real estate, business services, recreation services, professional services, and health services industries. Other industry sectors that see a large economic impact due to tourist related spending include wholesale trade, communications and banking.

A summary of overall economic impact of the Santa Rosa County tourism industry, delineating the direct, indirect, and induced impact of visitor spending is presented in Table 2-H below.

Table 2-H: Summary of the Impact of Tourism on the Santa Rosa County Economy

Visitor Spending Impact	Direct	Indirect	Induced	Total
Total Spending (Output)	\$38,426,994	\$5,666,271	\$4,110,012	\$48,203,277
Incomes Generated	\$8,482,642	\$2,062,852	\$1,348,680	\$11,894,173
Jobs Supported	656.2	93.6	69.4	819.3
Visitor Related Construction Impact				Total
Total Spending	\$25,610,050	\$5261,830	\$3,194,215	\$34,066,095
Incomes Generated	\$6,166,442	\$2,012,696	\$1,047,489	\$9,226,623
Jobs Supported	304	99	54	457
Total Visitor Economic Impact				Total
Total Spending	\$64,037,044	\$10,928,102	\$7,304,227	\$82,269,373
Incomes Generated	\$14,649,084	\$4,075,548	\$2,396,165	\$21,120,797
Jobs Supported	960.3	192.8	123.4	1,276.5
State and Local Taxes Generated				\$3,394,045

Source: *Tourism Impact on the Santa Rosa County Economy*, 2000, Haas Center for Business Research and Economic Development at the University of West Florida

Further, bed tax data collected by Santa Rosa County indicates that the majority (84.6%) of tourists find lodging in the southern portion of the County. Depending on their reason for visiting the area, guests may choose to stay in lodgings on the beach or within the city. The cost of the average room experiences greater seasonal fluctuation on the beach than on the mainland. Occupancy rates, on the other hand, follow similar patterns for properties throughout the area. The percent of rooms occupied on the mainland generally surpasses the occupancy rates on the beach during the winter months of December and January.

Because of the obvious economic benefit that the County is provided by Navarre Beach, care must be taken to develop the Beach in a manner that preserves its attractiveness to tourist. Ensuring quality development while protecting the environmental features that serve to attract tourists to the County in the first place are paramount. Similarly, it is important to provide the opportunity for the sustainable development of commercial

facilities such as lodging facilities, restaurants, amusements, and retail venues that sustain tourism.

Section 2.H: Development Trends

Subsection 2.H.1: Lease Ownership and Lease Provisions

The United States government controls the sections of the island immediately east and west of Navarre Beach. Escambia County owned and controlled Navarre beach upon acquiring it from the Federal Government following World War II. In 1956, Santa Rosa County executed a lease with Escambia County to, among other things, administer the area and issue leases to private interests for development purposes. In 1991, Santa Rosa County acquired jurisdiction over Navarre Beach pursuant to an Act of the Florida Legislature (Chapter 91-310, Laws of Florida).

Individual parcels are available for development and use by private interests through leases with the County. Each lease is individually negotiated between the County Government and the developer or lessee, and may differ with reference to the initial lease purchase fee, yearly lease payments, required infrastructure improvements impact fees, lease transfer fees and other terms and conditions. In general, the initial purchase fee is equal to the market value of the land and is paid prior to development. Annual payments are either fixed or calculated at a variable rate and paid after the construction is complete.

Fixed rate lease payments are typically set at a percentage of the purchase price and do not change over time. Some fixed payment agreements, however, contain adjustment clauses that tie the payment to a national price indicator, allowing fluctuation of the payment amount in either direction.

Lease payments for commercial income producing properties are variable and are structured as a percentage of gross sales receipts. Negotiated percentages, ranging

from three to eleven percent, may be coupled with minimum payments and may vary by the type of sale (i.e., lodging, food, liquor, merchandise). In addition, variable lease payment formulas are not static, but may be renegotiated.

As indicated above, there is wide variety and disparity in the terms and conditions of the leases. To initiate uniformity in the lease process and to establish equity in the imposition of lease fees, the proposed Master Plan provides that future leases be established in a manner that parallels fee simple properties on the mainland. That is, annual lease fees will be based on the assessed value of the subject parcel, together with any improvements, and a fee rate equal to the annual tax levy will be applied to determine the lease fee in any given year. Existing leases that are modified at the request of the leaseholder will be subject to the same fee provision.

Subsection 2.H.2: Existing Development

Because all of the land on Navarre Beach is publicly owned, development occurs through the transfer of long-term leaseholds to individual lessees. All leases are negotiated and approved by the Santa Rosa County Board of County Commissioners (BOCC). Currently, there are over 1,077 leases in effect, accounting for approximately 341 acres, or 56 percent of the land area of Navarre Beach.

Table 2-1 below summarizes Map 2-1 and indicates the residential development potential from the existing Navarre Beach leases. As can be determined from the Table, the current potential residential development potential is about 2,853 dwelling units (du's). This total includes developed parcels or existing units and those that theoretically could be constructed pursuant to individual leases on undeveloped parcels. If the individual lease did not specify a density, the currently adopted FLUM densities were utilized for calculation purposes. Redevelopment of currently developed leased parcels was not contemplated in this analysis.

Table 2-I: Summary of Residential Density by Lease

Lease Category	Density Specified by Lease	Potential Dwelling Units by Lease Category
Single Family Detached	1 du per lease	601
Multi-Family Residential (low)	0-5 du's per lease	144
Multi-Family (low to medium)	6-10 du's per lease	18
Multi-Family (medium)	11-25 du's per lease	153
Multi-Family (medium to high)	26-40 du's per lease	189
Multi-Family (high)	41-75 du's per lease	220
Multi-Family (very high)	76 + du's per lease	325
Commercial without Motel Units	Varies	81
Mixed Commercial & Residential	Varies	1,062
Multi-Family Residential (No Density Specified – FLUM Density Used)	Varies	60
TOTAL:		2,853

Source: Currently Adopted FLUM, Santa Rosa County Property Appraiser, Community Planning, Zoning & Development Division

Navarre Beach has been developed as a beach resort area featuring single and multi-family residential units, condominiums, two motels and a few supportive commercial businesses. Development interests and speculative building peaked in the late seventies due in large part to the resort construction in nearby Destin. By 1980, multifamily home construction had surpassed single-family construction and continues today as the most prevalent construction activity. Existing land use/development on Navarre Beach is depicted on Map 2-I and summarized in Table 2-I below.

Table 2-J: Existing Land Use Map Summary for Navarre Beach

Existing Land Use Category	Acreage	Units
County	90.3044	
Vacant	170.8897	
Roads	96.9338	
Parks and Recreational	193.5762	
Single Family Residential	58.4878	263
Commercial	39.1219	
Conservation – Public	41.1422	
Condominium	44.4328	1,284
Multi-Family Residential (>5 Units)	19.2316	295
Conservation – Private	15.1346	
Mixed	1.9735	
Utilities/Public Facilities	15.3387	
Institutional	.2795	
TOTAL:	801.0018	1,842

Source: Santa Rosa County Community Planning, Zoning & Development Division
 Santa Rosa County Property Appraiser's Office

As can be determined by comparing the lease density figures to the existing land use figures, development on Navarre Beach has occurred at a density much less than that allowed by lease. Navarre Beach is 57% built out with only 462 parcels remaining vacant, 4 of which are unleased with future development potential.

Map 2-1 Navarre Beach Lease Map



Legend

- Parcel Lines
- Leases
- Unleased
- Single Family Residential (0-1 DU's per Lease)
- Multifamily Residential (0-5 DU's per Lease)
- Multifamily Residential (6-10 DU's per Lease)
- Multifamily Residential (11-25 DU's per Lease)
- Multifamily Residential (26-40 DU's per Lease)
- Multifamily Residential (41-75 DU's per Lease)
- Multifamily Residential (76+ DU's Per Lease)
- Mixed Commercial & Residential
- Hotel
- Commercial - Restaurant
- Commercial - Convenience Store
- Commercial - Marina
- Multifamily Residential - No Density Specified



0.2 0 0.2 0.4 0.6 0.8 1 Miles



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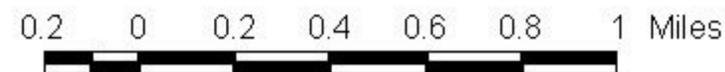
Map 2-J Navarre Beach Existing Land Use Map



Legend

Existing Land Use

- Commercial
- MF Residential Condo
- Conservation Private
- Conservation Public
- County
- Institutional
- MF Residential < 5
- MF Residential > 5
- Mixed Commercial/Residential
- Parks/Recreation
- Roads
- Single Family Residential
- Public & Private Utilities & Facilities
- Vacant



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Figure 2-A: Navarre Beach Existing Land Use Chart with Percentage Breakdown

