

APPENDIX

SUMMARY OF SURVEY FINDINGS GARMENT CENTER REDEVELOPMENT PROJECT

(Preliminary Report) *

(Bounded by N.W. 29th Street to the north, N.W. 22nd Street to the south, N.W. 2nd Avenue to the east and N.W. 6th Avenue to the west)

- There are 194 firms in the Garment Center of these 141 (73%) firms are in the garment-related business. The composition by economic activity of the 141 garment-related businesses is the following: 38% in manufacturing, 35% in whole-sale/retail, 1% in retail, 9% in wholesale and 17% in related business.
 - Responses from the garment-related businesses, indicated estimated sales in 1977 of \$121,703,881 (141 firms). Estimated sales in 1978 for garment-related businesses were \$137,399,402, representing an increase of 12.9%.
 - Responses to the survey indicated an estimated 3,214 employees working in garment-related businesses within the study area.
 - Responses to the survey indicated that 20% of firms owned their current business location and the 95% of these firms indicated plans to remain at their present location.
 - Responses to the survey indicated that 73% of the leaseholding firms plans to renew their leases, 5% did not plan to renew and 22% were undecided. It is significant that most of the undecided firms were in the manufacturing and with leases expiring before 1982.
 - Responses to the survey indicated 43 firms are considering expansion, 23 of these are interested in acquisition of additional land within the study area.
 - Garment-related businesses indicated interest in a total of 10.19 acres of additional land through a redevelopment project.
 - Anticipated employment that can be generated by the proposed expansion is approximately 1,000 new jobs.
 - Over 50% of the wholesale and retail activity in the Garment Center is generated by tourists & buyers from outside of South Florida.
 - The survey indicated that 38% of the garment-related businesses are members of the Fashion Business Association.
 - Problems identified by respondents to the questionnaire include: 37% requested improved police protection, 20% requested improved access to I-95, 18% requested improved bus services in the area, 13% requested improved parking space, 5% requested improvement in sanitation, 4% requested better lighting and 3% requested a job training program.
 - Other problems mentioned during the survey include: removal of street parking, need for tourist promotion, facade improvements, landscaping, additional support facilities as restaurants, elimination of dilapidated residential structures, expanded police protection, reduction in the inventory tax and additional traffic lights.
- Approximately 12% of the study area is presently vacant and 15% is presently residential.

* Figures in the this summary were adjusted after additional data was provided.

GARMENT CENTER REDEVELOPMENT PROJECT
 REPORT ON ACTUAL ECONOMIC CONDITIONS AND MARKET DEMAND FOR EXPANSION
 ACREAGE
 (PRELIMINARY REPORT) *

Research Findings

1. There are 194 firms in the Garment Center with the following composition: 54 firms in the manufacturing, 49 firms in the wholesale/retail, 2 firms in the retail, 12 firms in the wholesale, 24 related business (sewing machines, zippers, trimming and cutting), and 53 firms not related with garment industry, see Table I.

<u>TABLE I</u>		
INVENTORY OF GARMENT FIRMS AND OTHER BUSINESS IN THE GARMENT CENTER JANUARY, 1979.		
Economic Activity	Number	Percentage
Manufacturing	54	28
Wholesale/Retail	49	25
Retail	2	1
Wholesale	12	6
Related Business	24	12
Other business	53	28
Total	<u>194</u>	<u>100%</u>

The largest concentration of business are in manufacturing and other business (28%) followed by wholesale/retail business (25%).

2. Of the 194 firms in the Garment Center, 141 firms are in the Garment related business representing 73% of the total. The composition is the following: 38% in manufacturing, 35% in wholesale/retail, 1% in retail, 9% in wholesale and 17% in related-business, see Table II.

* Figures in this report were adjusted after additional data was provided.

TABLE II.
INVENTORY OF GARMENT RELATED FIRMS
JANUARY, 1979

Economic Activity	Number	Percentage
Manufacturing	54	38
Wholesale/Retail	49	35
Retail	2	1
Wholesale	12	9
Related Business	24	17
Total	141	100%

3. The sample obtained in the survey was divided by economic activity in the same format that the Inventory of Garment and Other Business, see Table III.

TABLE III

Economic Activity	Number	Percentage	
		Sample	Total No. of firms
Manufacturing	39	30	72
Wholesale/Retail	31	24	63
Retail	2	2	100
Wholesale	12	9	100
Related Business	10	8	42
Other Business	34	27	64
Total	128	100%	66%

The sample obtained provided 128 responses from a total of 194 firms in the area, representing 66% of the total. If the sample by area of activity is compared with the total number of firms in the Garment Center the results are the following: 72% in the manufacturing, 63% in wholesale/retail, 100% in retail and wholesale, 42% in related and 64% in other business, Table III.

4. Responses from the garment related business indicated estimated sales in 1977 of \$121,703,881 (141 firms) and sales of \$141,254,627 from the total firms interviewed (128 firms).
5. Estimated sales in 1978 in the garment related business were \$137,399,402 representing an increment of 12.9% in the garment related business in comparison with the estimated sales in 1977.
6. Responses to the survey indicated 3,214 employees working in the garment related industries and 3,892 employees working in the total Garment Center.

The following analysis will take in consideration first, the garment-related business in the sample (94 firms) and second, all firms in the Garment Center (128 firms in the sample).

7. Responses to the survey indicated 791,634 square feet (18.17 acres) dedicated to the garment-related business and 1,140,409 square feet (26.18 acres) in the total firms interviewed.
8. Responses to the survey indicated that of the 94 firms in the garment related business 20 (21%) owned their current business location and 74 (79%) were leases. Figures for the total sample are 36 (28%) owned their business and 92 (72%) were leases.
9. Of the 74 leaseholding firms in the garment-related business 54 (73%) indicated plans to renew their leases, 4 (5%) did not plan to renew, and 16 (22%) were undecided. It is significant that most of the undecided firms were in the manufacturing and with leases expiring before 1982. Figures from the total sample indicated that 67 (52%) plan to renew their leases, 6 (5%) did not plan to renew and 19 (21%) were undecided.
10. Of the 20 garment-related business owning their business locations, 19 (95%) indicated plans to remain at their present location. Figures from the total sample indicated 34 (94%) firms with plans to remain at their present location.
11. Response from firms indicated that 43 (46%) of the 94 garment-related business have or are considering expansion. Of the 43, 12 (28%) firms own their current location and 31 (72%) are leaseholders. Figures from the total sample indicated that of the 57 firms with plans for expansion 17 (30%) own their current location and 40 (70%) are leaseholders.
12. Of the 43 garment-related business with expansion plans 37 (86%) responded to the survey indicating that 21 (57%) are considering expansion within a year, 15 (41%) in 2-5 years, and 1 (3%) in 5 or more years. Figures from the total sample indicated 51 (89%) responses from 57 firms with expansion plans and that 24 (47%) are considering expansion within a year, 24 (47%) in 2-5 years and 3 (6%) in 5 or more years

13. Of the 43 garment-related with expansion plans 36 (84%) responded to the survey indicating that 4 (11%) require 1,000 sq. ft., 16 (44%) require 1,000-4,999 sq. ft., 9 (25%) require, 5,000-9,999 sq. ft., and 7 (19%) require 10,000 or more sq. ft. Figures from the total sample indicated 47 (82%) responses from 57 firms with expansion plans and that 7 (15%) require 1,000 sq. ft. 19 (40%) require 1,000-4,999 sq. ft., 8 (07%) require 500-9,999 sq, ft, and 13 (28%) require 10,000 or more sq. ft.
14. Of the 43 garment-related business with expansion plans 39 (91%) responded to the survey indicating that 16 (41%) could expand without additional land acquisition and 23 (59%) required additional land in order to expand. Figures from the total sample indicated 51 (89%) responses from 57 firms with expansion plans and that 22 (43%) could expand without additional land acquisition and 29 (57%) required additional land in order to expand.
15. Of the 43 garment-related business with expansion plans 38 (88%) responded to the survey indicating that 13 (34%) will expand through the acquisition of land by ownership, 25 (66%) will do it by lease. Figures from the total sample indicated 47 (82%) responses from 57 firms, 17 (36%) will expand through acquisition of land by ownership and 30 (64%) will do it by lease.
16. Responses from firms indicated that 23 (24%) of the 94 garment-related firms are interested in additional land through a redevelopment project. Figures from the total sample indicated 31 (24%) firms interested in additional land through the same program from a total of 128 firms.
17. Responses to the survey from garment-related business indicated interest in a total of 10.19 acres of additional land through a redevelopment project. Figures from the total sample indicated interest in 11.59 acres of additional land.
18. Anticipated manufacturing employment will be generated by the 43 garment-related business with expansion plan and will range between 837 to 959 jobs. Figures from the total sample indicated anticipated employment with range between 849 to 984 jobs.
19. In terms of additional wholesale/retail sales employment, anticipated number of jobs range between 57 to 115 jobs. Figures from the total sample indicated anticipated employment with range between 63 to 145 jobs. Total estimated in additional jobs in the garment -related industry range between 894 to 1,074 and 912 to 1,129 for the all Garment Center.
20. Responses to the survey indicated 70 (79%) of the 89 respondents were awared of the Fashion District Business Association.