



# Business Environment and Worker Survey

## Miami Downtown

September 2016

 **MIAMIDDA**  
DOWNTOWN DEVELOPMENT AUTHORITY

**FIU** | Metropolitan  
Center

## Executive Summary

---

The Miami Downtown Development Authority (Miami DDA), an independent agency of the City of Miami, is a leading information and research clearinghouse with unique and exclusive analytics on Downtown Miami. The Miami DDA advocates for Downtown stakeholders, addressing issues that impact quality of life and the economic health of the district. To this end, the Miami DDA contracted the Metropolitan Center (FIU/MC), a think-tank within Florida International University, to complete a report examining employees of Downtown Miami's business sectors. The DDA's main objective was to gain a deeper knowledge of the downtown employee population focusing on their commute, perception of downtown's amenities, and overall satisfaction with Downtown Miami. To that end, the MC utilized publicly and privately available statistics and data, and conducted a comprehensive in-person and online survey with over 400 respondents.

The report includes three main sections, focusing on Business Characteristics, Worker Characteristics and Attitudinal Survey Data. The main findings of these sections are summarized below.

### *Business Characteristics*

---

One of the report's objectives was to better understand the business environment in Downtown Miami through examining private sector industries and establishments. This information was analyzed through the lens of Greater Downtown Miami and related zip codes, and then compared between 2004 and 2014. Below are the most notable findings:

- The Greater Downtown Area has 6,882 private establishments with 102,334 total employees and \$7.1 billion in annual payroll.
- The Miami DDA area has a high concentration of high-skill, high-wage jobs.
- 29.8% of Downtown Miami's businesses are in the Professional, Scientific, and Technical Services sector in which the average worker income in 2015 was \$80,677.
- In the last ten years, there has been a 27.3% growth in the number of Downtown Miami establishments.
- The 33131 zip code had the most jobs in 2014 with 35,078 employees and an average income of \$106,109.

### *Worker Characteristics*

---

To gain deeper knowledge of the Downtown Miami worker, the analysis relied on data from the US Census Bureau and their analytical tool, [On the Map](#). The results showed that Downtown's workers are well educated and have incomes higher than those of workers overall in the county. The analysis also showed a population that primarily commutes to work in downtown, while the majority who live in downtown work outside of it.

- Most of the Greater Downtown Miami's workforce commutes into the DDA Area from outside the area (95.5%).
- 41,000 workers travel 10-24 miles from North/Northwest; 45,000 travel from West/Southwest; and over 13,000 downtown workers commute 25 miles or more.
- Workers in Greater Downtown Miami have higher education levels than workers in Miami-Dade County, with 26.3% with a Bachelor's degree or higher in the Greater DDA compared to 19.9% countywide.

- Downtown workers saw significant rises in income over the past decade, with a 30.1% increase in the number of downtown workers who earn more than \$3,333 per month, or \$40,000 a year, and a decline in those earning less. As a result, 55.3% of Downtown Miami workers earn more than \$40,000 annually while only 37.2% of Miami-Dade County workers earn similarly.

## Survey Results

---

While descriptive, secondary data is integral in knowing who the Downtown Miami workers and businesses are, primary data collected through surveys reveals what motivates survey respondents and what is important to them, and gather meaningful opinions, comments, and feedback.

There were a total of 423 completed surveys - 117 in person and 306 online. General staff (42.7%) were the largest worker representation, while there was also considerable participation by executives, partners, or principals (25.3%), and managers (21.7%).

- A third (33.3%) of respondents work in Government or Public Administration, while the rest represented a variety of private sectors, including Hospitality and Food Services (10.9%) and Business Services (10.9%).
- Respondents reported using multiple modes of transportation to reach Downtown Miami; most drove a vehicle (61.0%), while many also used the Metrorail or Metromover (26.0%). Other modes of transportation with significant use included walking (9.9%) or using the Metrobus (9.9%).
- Many downtown workers showed a difference between how they commute, versus how they would prefer to commute; 61.0% drive while only 39.5% would prefer to drive and only 26.0% take the Metrorail or Metromover, while 39.2% would prefer using them.
- To get around Downtown Miami during business hours, nearly half of respondents use the Metromover (48.2%), walk (47.8%), or use their personal car (47.0%).
- Respondents said that the intersections along Brickell Avenue, especially the Brickell Avenue Bridge over the Miami River, are the worst congestion spots across Greater Downtown Miami.
- Extremely important factors influencing transportation use included reliability (84.7%), convenience (80.5%), time to destination (78.7%), and overall stress and hassle (74.6%).
- A significant percentage of respondents would be willing to relocate to downtown Miami if housing was less expensive (56.6%), if the area was safer (52.2%), and cleaner (48.5%). Among all respondents, better K-12 schools would influence a smaller percentage of workers in choosing downtown (28.5%), but good schools are a more important factor among adults with children (44.9%).
- Only half of respondents said they earned a comfortable wage (47.8%), or that there were enough jobs downtown (48.7%).
- The top five sectors where downtown workers want to see more jobs are Professional, Scientific & Tech Services (17.1%), Arts & Entertainment (15.5%), Government/ Public Administration (10.3%), Health Care & Medical (10.3%), and Business Services (8.9%).
- Survey participants considered a number of improvements in Downtown Miami as extremely important, including safety at night (83.4%), reducing homelessness (81.5%), cleanliness of streets (79.7%), public transportation (79.5%), and attractiveness, sense of place and walkability (78.1%). Educational offerings (34.1%) and an active waterfront (31.9%) received the lowest percentage of “extremely important” responses.

## Table of Contents

---

|   |           |
|---|-----------|
| <b>AREA OVERVIEW .....</b>                        | <b>1</b>  |
| <b>THE DOWNTOWN BUSINESS ENVIRONMENT.....</b>     | <b>2</b>  |
| <b>MIAMI DOWNTOWN WORKER CHARACTERISTICS.....</b> | <b>8</b>  |
| <b>DOWNTOWN EMPLOYEE SURVEY RESULTS .....</b>     | <b>13</b> |

### List of Tables

---

|  |    |
|--|----|
| Table 1: Change in Business Establishments for DDA Zip Codes: 2014 .....                         | 2  |
| Table 2: Business Characteristics for Downtown Miami: 2014.....                                  | 4  |
| Table 3: Top 10 Sectors by Number of Establishments for ZIP Codes of DDA Area: 2014 .....        | 5  |
| Table 4: Zip Code Business Patterns by Employment Size Class: 2014.....                          | 5  |
| Table 5: DDA Establishments by Employment Size Class: 2016.....                                  | 6  |
| Table 6: DDA Establishments by Sales Volume: 2016.....   | 6  |
| Table 7: Top 10 Industry Sectors by Number of DDA Establishments: 2016 .....                     | 7  |
| Table 8: Jobs in Greater Downtown Miami: 2016.....   | 9  |
| Table 9: Job Inflow and Outflow: 2004 & 2014.....  | 10 |
| Table 10: Origin of Travel to Work for Downtown Workers Residing in Miami-Dade County, 2014..... | 12 |

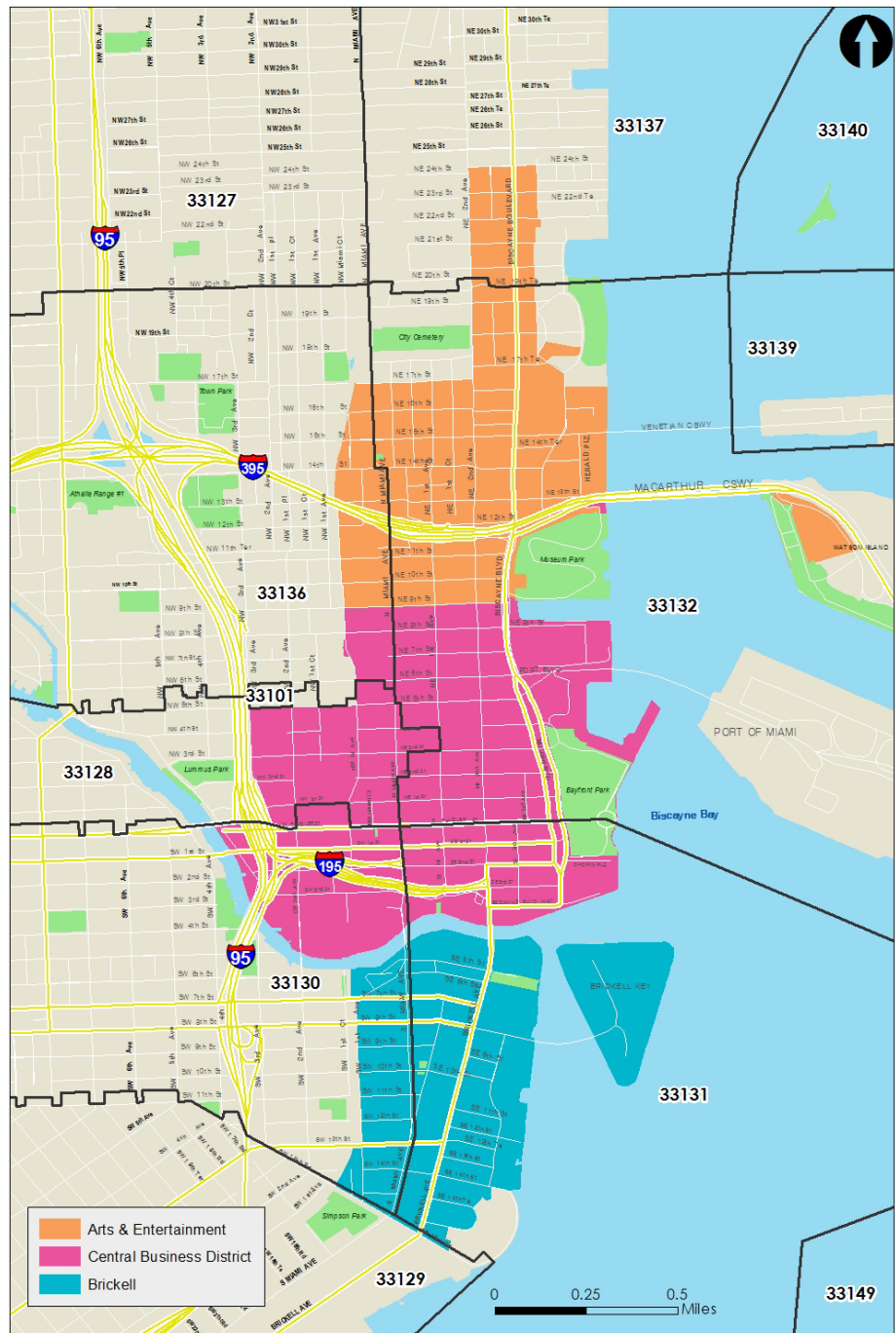




## Area Overview

The business scan of the Miami Downtown area focuses on identifying the business establishments and defining their characteristics in terms of industry sectors, employees and sales volume. The downtown district, as defined by the Miami DDA, is fully contained within six zip codes – 33128, 33130, 33131, 33132, 33136 and 33137 – but all of these zip codes also extend outside the DDA boundaries. The urban core of the DDA area is comprised of two zip codes: 33131 which is the southeastern section of the DDA area and 33132 which includes the northeastern part.

Greater Downtown Miami is a 3.8 square mile area of prime waterfront real estate in tropical Miami. It is situated between Interstate 95 on the west and Biscayne Bay on the east, the Julia Tuttle Causeway on the north, and the Rickenbacker Causeway on the south. Miami Downtown Development Authority (DDA) represents the urban core of Greater Downtown which constitutes three neighborhoods – the Brickell Financial District, the Central Business District (CBD), and the Arts & Entertainment District. Greater Downtown also includes Wynwood, Edgewater, Midtown, and historic Overtown. This report relies on multiple sources of information including reports developed by the Miami DDA, U.S. Census County Business Patterns data, and proprietary data from InfoUSA.



**MIAMI DDA**  
DOWNTOWN DEVELOPMENT AUTHORITY

Miami DDA Boundary  
with Zip Codes

## The Downtown Business Environment

Downtown Miami is a traditional employment center as demonstrated by the significant influx of workers from all over Miami-Dade County, as well as Broward and Palm Beach counties. The area’s daytime population is almost three times its resident population. However, over the last decade Miami’s downtown area has been transformed into a dynamic, high-density urban environment that is not only the epicenter of economic activity in the City of Miami, but also a hub for culture, entertainment and recreation. Over the last two decades Downtown Miami has become a destination area, densely populated not only during the day from the influx of workers, but also during nights and weekends from domestic and international visitors.

Downtown Miami’s residential population has doubled over the last 15 years, and in combination with the increase in visitors, has created a market demand for products and services that benefit the business establishments in the area. The comparison of the economic environment in the area from 2004 to 2014, shows significant growth in economic activity.

The business growth in the Miami DDA is illustrated in Table 1. There has been an increase of 27.3% in the reported establishments between 2004 and 2014. Interestingly, the increase in the number of establishments was not accompanied by the same percentage increase in employees. The number of employees for those establishments in the Miami DDA zip code area increased by 12.2%, which suggests that overall the businesses in the area have, on average, a smaller workforce. The most significant increase from 2004 to 2014 was in payroll, 41.4%, which is a good indication that the local economy is growing. It also suggests rising personal income for workers employed in the downtown area.

The analysis of industry sectors shows that Downtown Miami has significant growth across many sectors. Growth is measured by the rate of new employment over time by industrial sector. Figure 1 illustrates the Greater Downtown Miami economy through three metrics for each industry cluster: growth rate (%), location quotient (LQ)<sup>1</sup> (which is the per capita concentration in the area relative to the county), and number of employees (the relative size of the bubble).

### Greater Downtown Miami Fast Facts:

- ◆ Greater Downtown Area: 3.8 Square Miles
- ◆ 2016 Greater Downtown Population: 88,540
- ◆ 2016 Daytime Population: 234,976
- ◆ 2021 Projected Population: 106,429
- ◆ 29,813 New Residential Units Since 2003
- ◆ 18.7 Million Sq. Ft. of Office Space
- ◆ 7,969 Hotel Rooms

*Source: Miami DDA, 2016 Greater Downtown Miami Demographics Report.*

**Table 1: Change in Business Establishments for DDA Zip Codes: 2014**

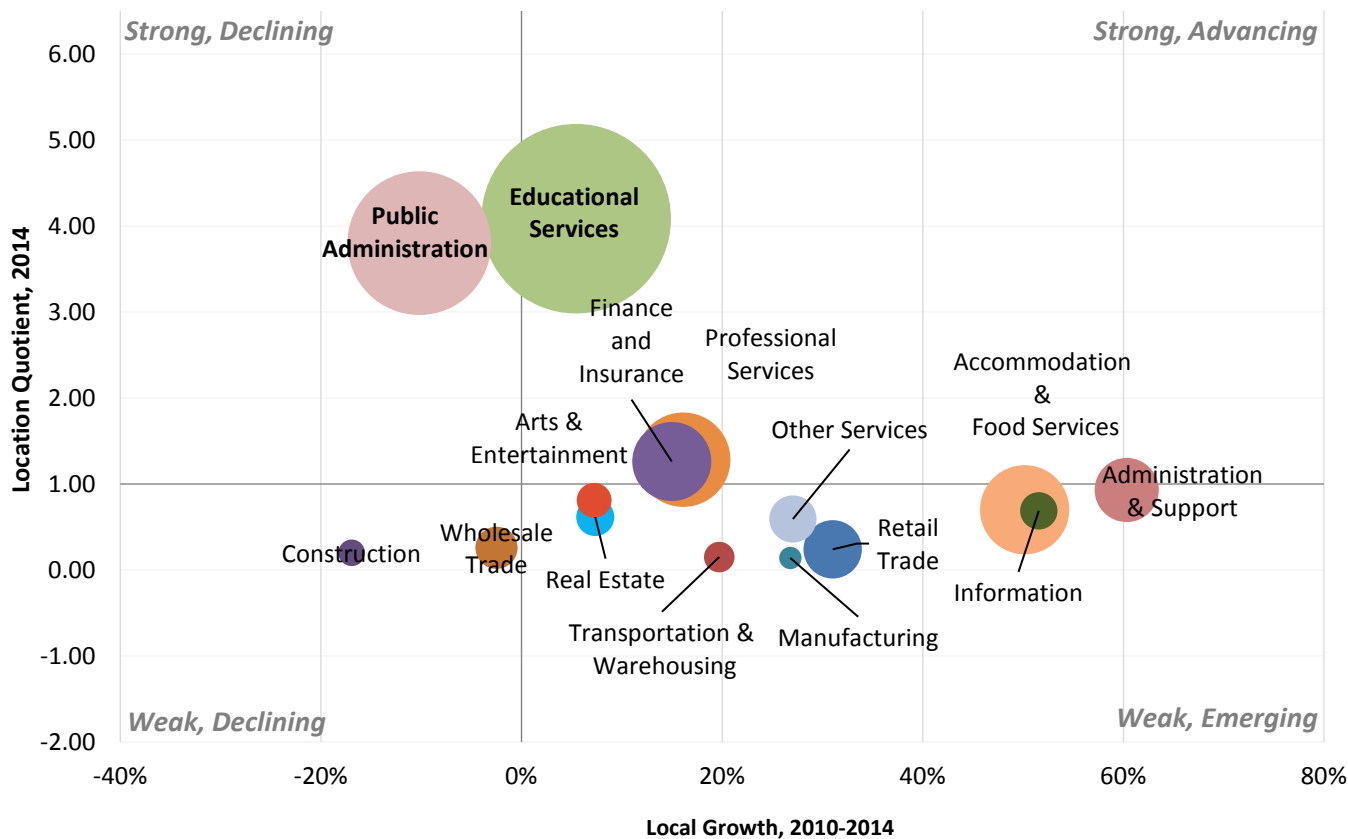
|                                  | 2004        | 2014        | Change |
|----------------------------------|-------------|-------------|--------|
| <b>Number of establishments</b>  | 5,407       | 6,882       | 27.3%  |
| <b>Number of employees</b>       | 91,170      | 102,334     | 12.2%  |
| <b>Payroll</b><br>(in thousands) | \$5,019,502 | \$7,097,567 | 41.4%  |

*Source: U.S. Census Bureau, ZIP Code Business Patterns, 2000-2014.*

<sup>1</sup> Location quotients (LQs) represent the competitiveness of each major industry by identifying the concentration of a sector in a local economy relative to a larger reference economy. The LQ is the ratio between the percentage of employment in an industry locally to the percentage of employment in the same industry found in the reference economy. A LQ of 1.0 means that the local economy and the reference economy are on par with employment generation in the same industrial sector.

Figure 1 below, shows that two industry sectors – *Public Administration* and *Educational Services* – have high employment as well as high LQ. *Public Administration* has a LQ of 3.80 and *Educational Services* has LQ of 4.09 which indicates that the area has proportionately more workers than the county employed in these industry sectors. Sectors that saw both moderate growth and an above average LQ included Professional Services—16.1% growth and a 1.28 LQ, and Finance and Insurance—15.0% growth and a 1.26 LQ. The high LQs of these two industries show the degree of industry specialization within the DDA area and translates into a competitive advantage for these sectors in the local economy.

**Figure 1: Industry Clusters in Greater Downtown Miami: 2010-2014**



**Industry Sectors by Total Employment (2014)**

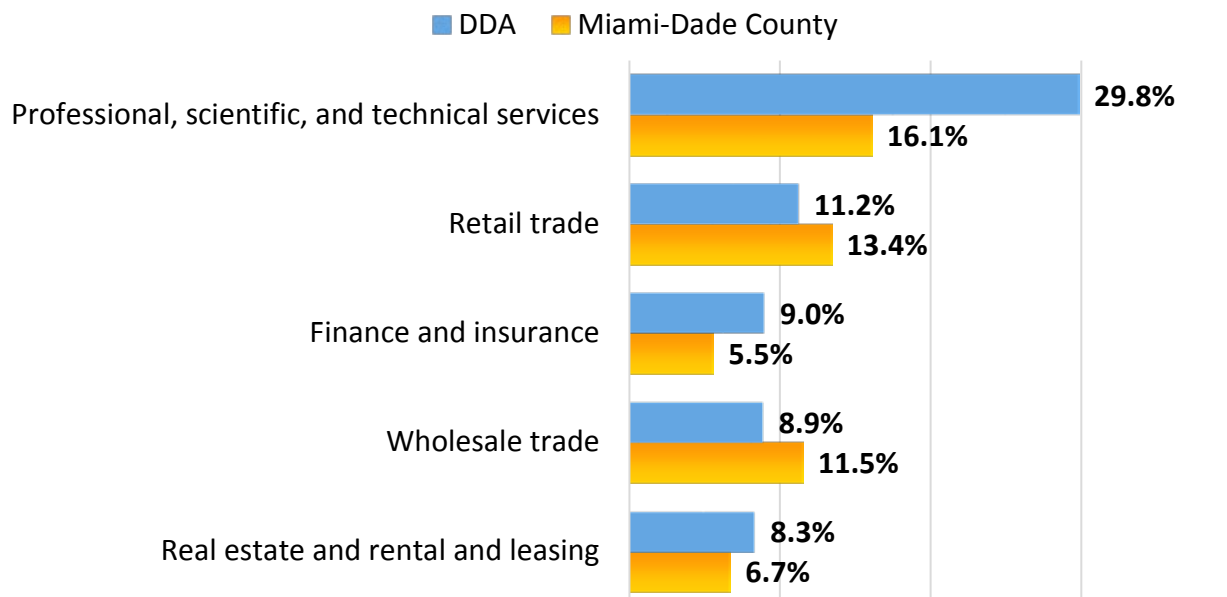
- Educational Services (58,395)
- Professional, Scientific, and Technical Services (14,476)
- Accommodation and Food Services (12,926)
- Administration & Support, Waste Management and Remediation (6,694)
- Wholesale Trade (2,893)
- Real Estate and Rental and Leasing (2,351)
- Construction (1,148)
- Arts, Entertainment, and Recreation (1,970)
- Manufacturing (809)
- Public Administration (33,573)
- Finance and Insurance (10,154)
- Retail Trade (5,537)
- Health Care and Social Assistance (11,908)
- Other Services (excluding Public Administration) (3,616)
- Information (2,266)
- Transportation and Warehousing (1,518)
- Management of Companies and Enterprises (1,226)

Source: U.S. Census, American Community Survey 2010-2014. Created by the Miami DDA.



The downtown area has a high concentration of business establishments in high-skill, high-wage sectors including Professional, Scientific and Technical Services and Finance and Insurance. According to the Florida Department of Economic Opportunity, the average annual wages in these sectors for 2015 were \$80,677 and \$98,778 respectively. These are among the top earning sectors in Miami-Dade County, preceded only by the Management of Companies and Enterprises sector, in which wages were \$121,962. In addition to these top earning sectors, the area also has a high concentration of retail establishments (773) in which the average annual wage in 2015 was \$30,380.

**Figure 2: Top Five Industry Sectors, 2014**



Source: U.S. Census Bureau, 2014 ZIP Code Business Patterns.

The two core zip codes of Downtown Miami, 33131 and 33132, encompass approximately 80% of the area and include over 4,000 establishments with approximately 57,000 employees. Between 2004 and 2014, the number of establishments in this core area increased by 917, or 27% in ten years.

**Table 2: Business Characteristics for Downtown Miami: 2014**

| Geography    | Number of establishments | Paid employees for pay period | Annual payroll (\$1,000) |
|--------------|--------------------------|-------------------------------|--------------------------|
| ZIP 33131    | 3,190                    | 35,078                        | \$3,722,093              |
| ZIP 33132    | 1,120                    | 22,394                        | \$869,077                |
| ZIP 33128    | 162                      | 2,268                         | \$87,217                 |
| ZIP 33130    | 1,024                    | 9,855                         | \$474,976                |
| ZIP 33136    | 232                      | 21,813                        | \$1,408,911              |
| ZIP 33137    | 1,154                    | 10,926                        | \$535,293                |
| <b>Total</b> | <b>6,882</b>             | <b>102,334</b>                | <b>\$7,097,567</b>       |

Core DDA Zip Codes

**Greater Downtown Area:**  
 6,882 establishments  
 102,334 employees  
 7.1 billion annual payroll

Source: U.S. Census Bureau, 2014 ZIP Code Business Patterns.

The DDA zip code with the largest number of establishments was 33131 (an area stretching from NE 1<sup>st</sup> Street to the North and SE 15<sup>th</sup> Road to the South). This area makes up much of the Brickell Financial District and part of the Central Business District and is dominated by Professional, Scientific, and Technical Services with 1,251 establishments. The 33131 zip code also contains the bulk of Greater Downtown’s Finance and Insurance sector with 443 of the 616 total establishments.

**Table 3: Top 10 Sectors by Number of Establishments for ZIP Codes of DDA Area: 2014**

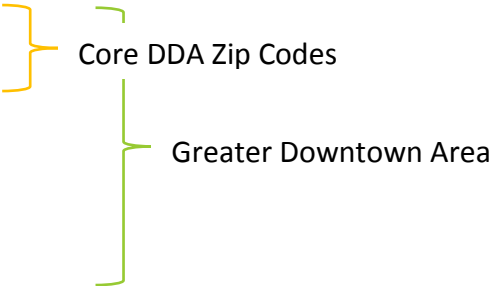
| NAICS code                   | NAICS Code Description                                      | 33128      | 33130        | 33131        | 33132        | 33136      | 33137        | Total        |
|------------------------------|---|------------|--------------|--------------|--------------|------------|--------------|--------------|
| 23                           | Construction  | 6          | 23           | 49           | 17           | 5          | 28           | 128          |
| 56                           | Admin., and Support and Waste Mgmt and Remediation services | 5          | 42           | 145          | 39           | 7          | 43           | 281          |
| 81                           | Other services (except public administration)               | 15         | 63           | 129          | 83           | 27         | 72           | 389          |
| 62                           | Health care and social assistance                           | 25         | 61           | 84           | 33           | 42         | 75           | 320          |
| 72                           | Accommodation and food services                             | 20         | 127          | 142          | 105          | 25         | 94           | 513          |
| 52                           | Finance and Insurance                                       | 8          | 56           | 443          | 45           | 13         | 51           | 616          |
| 53                           | Real estate and rental and leasing                          | 9          | 83           | 277          | 88           | 12         | 103          | 572          |
| 42                           | Wholesale trade   | 5          | 51           | 257          | 178          | 19         | 100          | 610          |
| 44-45                        | Retail trade  | 27         | 133          | 189          | 210          | 38         | 176          | 773          |
| 54                           | Professional, scientific, and technical services            | 21         | 309          | 1,251        | 168          | 19         | 284          | 2052         |
| <b>Total for all sectors</b> |   | <b>162</b> | <b>1,024</b> | <b>3,190</b> | <b>1,120</b> | <b>232</b> | <b>1,154</b> | <b>6,882</b> |

Source: U.S. Census Bureau, 2014 ZIP Code Business Patterns.

The majority of businesses within the DDA are small enterprises with fewer than 10 employees. Across almost all zip codes in the Greater DDA area, more than 80% of establishments are in this small business category. This distribution is typical of businesses in Miami-Dade County, in which 81% of firms have fewer than 10 employees and only 1.7% have 100 or more workers.

**Table 4: Zip Code Business Patterns by Employment Size Class: 2014**

| ZIP   | Under 10 | 10-49 | 50-99 | 100+ |
|-------|----------|-------|-------|------|
| 33131 | 82.0%    | 13.4% | 2.4%  | 2.1% |
| 33132 | 82.4%    | 12.9% | 1.9%  | 2.8% |
| 33128 | 80.2%    | 13.6% | 2.5%  | 3.7% |
| 33130 | 81.2%    | 14.6% | 2.7%  | 1.5% |
| 33136 | 74.6%    | 18.5% | 2.2%  | 4.7% |
| 33137 | 82.3%    | 14.3% | 1.7%  | 1.6% |



Source: U.S. Census Bureau, 2014 ZIP Code Business Patterns.

In addition to the analysis of the Miami Downtown area at the zip code level, the research team also reviewed a proprietary database from InfoUSA, a leading business and consumer leads provider. The database provided by the DDA contained 8,494 total records. The Miami DDA area covers less than two square miles of land, but has a large concentration of residents and businesses – 40,000 residents and 4,200 establishments per square mile. This is a very dense concentration compared to Miami-Dade County’s density of 3,700 persons, and 42 establishments per square mile.

InfoUSA also provided more detailed information on 6,502 establishments, including employee size and sales. The majority of establishments - 75% - are concentrated in the two main zip codes, 33131 and 33132, which encompass most of the DDA area. The majority is also small businesses, as defined by the U.S. Small Business Administration (SBA). SBA has established numerical definitions, or "size standards", for all for-profit industries to be classified as a small business. Such size standards also include a business’s subsidiaries and affiliates. The classification varies by industry sector, with some sectors being classified as “small,” based on average number of employees, while for others the determining factor is average annual receipts.

**Table 5: DDA Establishments by Employment Size Class: 2016**

| Employee Size | Count        | Percentage |
|---------------|--------------|------------|
| 1-9           | 4,897        | 75.4%      |
| 10-19         | 525          | 8.1%       |
| 20-49         | 327          | 5.0%       |
| 50-99         | 140          | 2.2%       |
| 100-249       | 86           | 1.3%       |
| 250-999       | 38           | 0.6%       |
| 1,000+        | 9            | 0.13%      |
| Unknown       | 480          | 7.4%       |
| <b>Total</b>  | <b>6,502</b> |            |

Source: InfoUSA, 2016.

**Table 6: DDA Establishments by Sales Volume: 2016**

| Sales Volume          | Count        | Percentage |
|-----------------------|--------------|------------|
| Less Than \$500,000   | 2,091        | 32.2%      |
| \$500,000 - 1 Million | 1,416        | 21.8%      |
| \$1 - 2.5 Million     | 1,006        | 15.5%      |
| \$2.5 - 5 Million     | 482          | 7.4%       |
| \$5 - 10 Million      | 219          | 3.4%       |
| \$10 - 20 Million     | 93           | 1.4%       |
| \$20 - 50 Million     | 65           | 1.0%       |
| \$50 - 100 Million    | 16           | 0.3%       |
| Over 100 Million      | 17           | 0.26%      |
| Unknown               | 1,097        | 16.9%      |
| <b>Total</b>          | <b>6,502</b> |            |

Source: InfoUSA, 2016.

In general, nearly all firms with fewer than 500 employees or sales under \$10 million, qualify as small businesses. According to the SBA, 99.7% of all U.S. firms are small businesses.<sup>2</sup> Based on the same definitions, the distribution in the DDA area mirrors the country.

<sup>2</sup> The full guide of the Small Business Administration for classification of businesses is available on the SBA website: [https://www.sba.gov/sites/default/files/files/Size\\_Standards\\_Table.pdf](https://www.sba.gov/sites/default/files/files/Size_Standards_Table.pdf)

While most establishments have few employees and sales under \$10 million, the DDA area also has several major firms such as; City National Bank of Florida and Sabadell United Bank, whose individual net worth is estimated at over \$1 billion for each. Other major firms include: VITAS Healthcare Corporation, Mastercard International and Intercontinental Hotels.

The majority of establishments are in the Professional, Scientific, and Technical Services sector. Establishments in that sector vary widely, including law, engineering and accounting firms, design businesses, advertising or computer technology, as well as scientific research and management consulting. Within this sector, the majority of firms in the DDA area (57%) provide legal services. The second largest category (13%) are firms classified as Management, Scientific, and Technical Consulting Services.

**Table 7: Top 10 Industry Sectors by Number of DDA Establishments: 2016**

| NAICS | NAICS Code Description                                      | Count | Percentage |
|-------|---|-------|------------|
| 54    | Professional, scientific, and technical services            | 1,443 | 22.2%      |
| 44-45 | Retail trade  | 743   | 11.4%      |
| 52    | Finance and Insurance                                       | 554   | 8.5%       |
| 53    | Real estate and rental and leasing                          | 436   | 6.7%       |
| 72    | Accommodation and food services                             | 408   | 6.3%       |
| 42    | Wholesale trade   | 357   | 5.5%       |
| 81    | Other services (except public administration)               | 321   | 4.9%       |
| 92    | Public Administration                                       | 296   | 4.6%       |
| 56    | Admin., and Support and Waste Mgmt and Remediation services | 284   | 4.4%       |
| 99    | Industries not classified                                   | 478   | 7.4%       |

Source: InfoUSA, 2016.

The DDA area is also home to a significant number of advanced industries establishments. The Advanced Industries sector encompasses 50 industries, ranging from manufacturing industries such as: automotive and aerospace, to energy industries such as oil and gas extraction, and high-tech services. These subsectors share the common thread of investing heavily in technology innovation and employment of skilled STEM (science, technology, engineering, and math) workers. According to the Brookings Institution, “these industries encompass the country’s best shot at supporting innovative, inclusive, and sustainable growth.”<sup>3</sup>

The 50 industry subsectors are grouped into three categories - Manufacturing, Energy and Services. Within the DDA area, the Manufacturing and Energy sectors have a very small representation in terms of number of establishments (fewer than 50), but a significant presence of firms in the Services sector (almost 300). The top three subsectors in terms of firms within the Services classification include: Management, Scientific, and Technical Consulting, Telecommunications, and Scientific Research and Development. These subsectors are at the core of the innovation drive that typifies the Advanced Industries sector and are a strong driver for economic development.

<sup>3</sup> The Brookings Institution, <http://www.brookings.edu/about/programs/metro/advanced-industries>

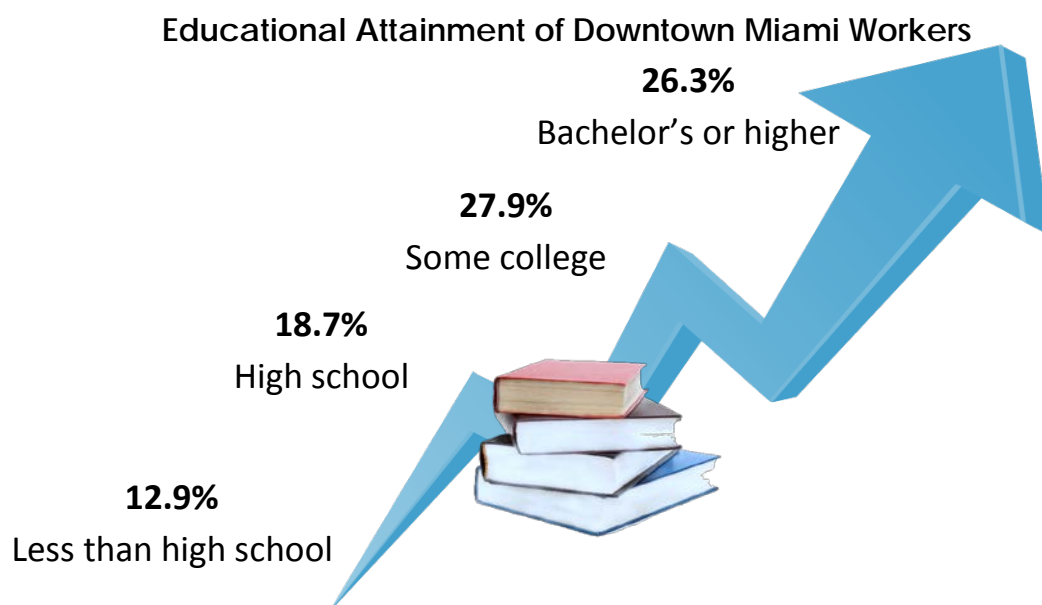
## Miami Downtown Worker Characteristics

As indicated in the previous sections, the Miami downtown area is home to a wide array of establishments in terms of employee size, sales and industry sector. While the focus of the present report is on private employers, the DDA area also hosts the largest public employers in the county. Approximately 28,000 people are employed within Miami-Dade County government, and more than 20,000 people are employed for city, state and federal government institutions with offices in the downtown area. While not all of their employees are located in downtown, these major institutions and the services they provide contribute to the upsurge in daytime downtown population (over 230,000).

### Demographics

According to the U.S. Census, in 2014, the Miami DDA Area had 171,613 workers, an increase of 12.9% since 2004.<sup>4</sup> In contrast to gender distribution of workers in Miami-Dade County, where 52.7% of these were male, the Miami DDA Area has a distribution of 55.7% female workers and 44.3% male workers. Of these workers, 69% identified as White, 27% as Black, 2.3% as Asian, and 1.7% covered two or more race groups, American Indian or Alaska Native, and Native Hawaiian or Other Pacific Islander. Furthermore, across all race identification, 44.7% of the workers also reported themselves as being of Hispanic or Latino descent. Approximately 61% of workers in the Miami DDA Area are in the prime working age (30 to 54) and 25% are older than 55. This distribution of workers by age group is similar to the countywide worker demographics.

Notably, the percentage of downtown workers who have a Bachelor's degree or higher (26.3%) is significantly higher than Miami-Dade County (19.9%). However, there is a smaller percentage of downtown workers with a high school degree or less (31.6%) than the county (36.3%). In contrast to the U.S. Census Bureau's American Community Survey, which reports educational attainment for those aged 25 and above, the Bureau's On the Map does not report the educational attainment of those 29 and younger because many are still actively pursuing college degrees. This percentage of workers was 14.2% for Downtown Miami and 19.7% for Miami-Dade County.



<sup>4</sup> U.S. Census Bureau, Center for Economic Studies, <http://onthemap.ces.census.gov/>



## Economy

The majority of workers in Greater Downtown Miami were employed in Educational Services sector (34.0%), followed by Public Administration (19.6%), and the Professional, Scientific, and Technical Services fields (8.4%). Additional industries grouped by The North American Industry Classification System (NAICS) Industry Sectors are presented in **Table 8**. Some of these industry sectors have wages above the county average of \$50,534, as reported by the Florida Department of Economic Opportunity in 2015. The average wage in 2015 in the Public Administration sector was \$68,882, and \$80,677 in Professional and Technical Services. However, the average wage in Educational Services was \$44,831, or 11% below the county average.

As a result of the concentration of high-wage industries, the earnings for downtown workers exceed the countywide figures substantially. Only 37.2% of countywide workers have monthly earnings of over \$3,333, or \$40,000 annually, while the majority of downtown workers (55.3%) are in that range. The Miami DDA area also has a lower percentage of workers earning \$1,250 per month or less (18.1%) than the county (22.5%). \$1,250 a month represents an annual income of \$15,000.

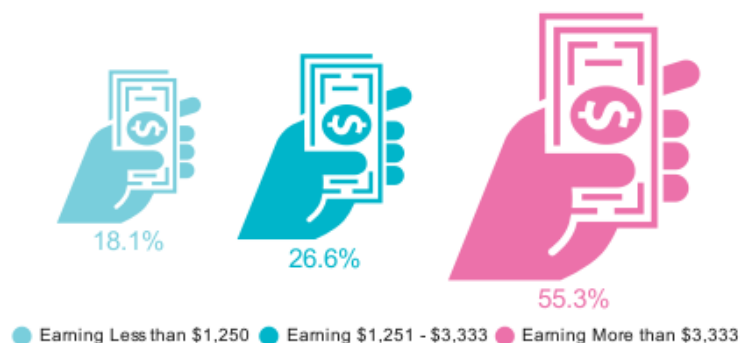
It is important to note that from 2004 to 2014, there has been a 30.1% increase in the number of downtown workers who earned more than \$3,333 per month. This statistic is important, as it points to the fact that new downtown workers (almost a 20,000 increase since 2004) are being absorbed in the higher wage earning jobs. In contrast, the number of employees in the low-paying brackets under \$3,333 per month decreased over the 2004-2014 period.

**Table 8: Employment Sectors for Downtown Workers: 2014**

| NAICS Code Description                           | Count  | Percentage |
|--|--------|------------|
| Educational Services                             | 58,395 | 34.0%      |
| Public Administration                            | 33,573 | 19.6%      |
| Professional, Scientific, and Technical Services | 14,476 | 8.4%       |
| Accommodation and Food Services                  | 12,926 | 7.5%       |
| Health Care and Social Assistance                | 11,908 | 6.9%       |
| Finance and Insurance                            | 10,154 | 5.9%       |
| Admin. & Support, Waste Mgmt and Remediation     | 6,694  | 3.9%       |
| Retail Trade                                     | 5,537  | 3.2%       |
| Other Services (excl. Public Administration)     | 3,616  | 2.1%       |
| Wholesale Trade                                  | 2,893  | 1.7%       |
| Real Estate and Rental and Leasing               | 2,351  | 1.4%       |
| Information                                      | 2,266  | 1.3%       |
| Arts, Entertainment, and Recreation              | 1,970  | 1.1%       |
| Transportation and Warehousing                   | 1,518  | 0.9%       |
| Management of Companies and Enterprises          | 1,226  | 0.7%       |
| Construction                                     | 1,148  | 0.7%       |
| Other  | 962    | 0.7%       |

Source: On the Map; U.S. Census Bureau, Center for Economic Studies

## Average % of Monthly Earnings for Downtown Workers



## Commuting

The number of downtown workers living within the DDA has more than doubled since 2004, on par with the overall population increase in the area. However, the downtown labor market continues to attract most of its workers from outside the DDA area. Only 4.5% of Downtown Miami workers are also residents. Conversely, almost three-quarters of downtown workers are employed outside the area.

The comparison of 2004 and 2014 data shows two important trends. First, the percentage of DDA residents employed in the area has increased, from 2.2% to 4.5% (see table below). Second, the percentage of workers living in the area but employed outside of it has decreased, even in the context of overall increasing number of employed DDA residents, from 9,930 in 2004 to 21,556 in 2014. In combination, these statistics may suggest that more residents are beginning to view the DDA area as a place to live and work.

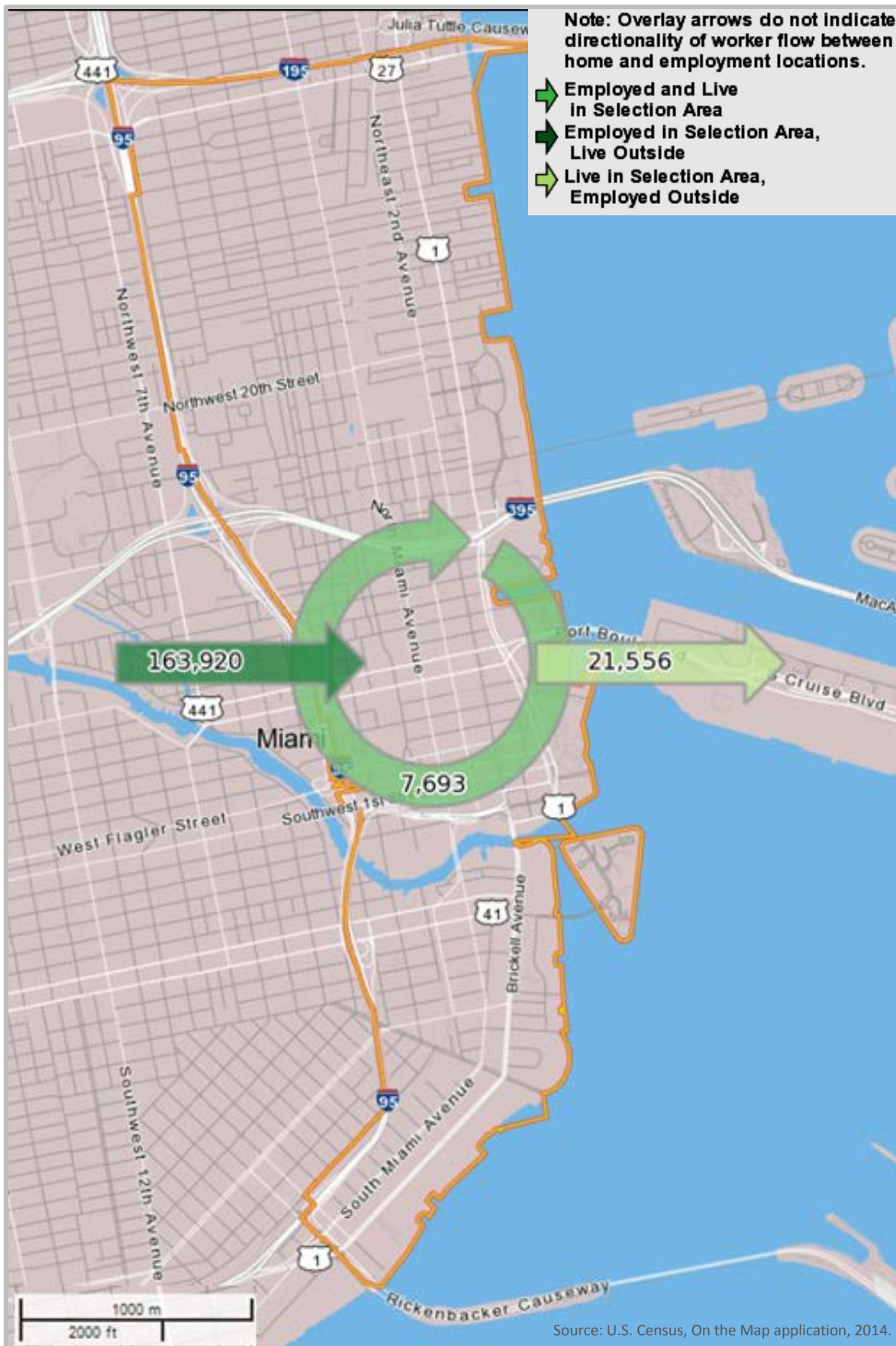
**Table 9: Job Inflow and Outflow: 2004 & 2014**

| Status                                      | 2004           |            | 2014           |            |
|---|----------------|------------|----------------|------------|
|   | Count          | Percentage | Count          | Percentage |
| Employed in DDA area but not residing in it | 148,473        | 97.8%      | 163,920        | 95.5%      |
| Employed and living in DDA area             | 3,270          | 2.2%       | 7,693          | 4.5%       |
| <b>Employed in DDA Area</b>                 | <b>152,053</b> |            | <b>171,613</b> |            |
| Living in the DDA Area but Employed Outside | 9,930          | 75.2%      | 21,556         | 73.7%      |
| <b>Living in the DDA Area</b>               | <b>13,200</b>  |            | <b>29,249</b>  |            |

Source: On the Map; U.S. Census Bureau, Center for Economic Studies.

The following map shows the inflow and outflow of downtown workers in the analysis area, with arrows showing the total number of workers that enter or leave downtown for work—not the direction they are geographically moving. The majority (95.5%) of the 171,613 workers travel to their downtown workplace from another area. Only a small percentage (15.8% or 27,121) of downtown workers live in City of Miami. Additionally, 4.7% reside in Miami Gardens, 4.0% in Hialeah, and 3.1% each in Miramar (Broward County) and the Kendall area (unincorporated Miami-Dade). The concentrations of downtown workers across other cities and areas are less than three percent. **Table 10** and **Figure 3** below show the distribution of downtown workers by direction and distance.

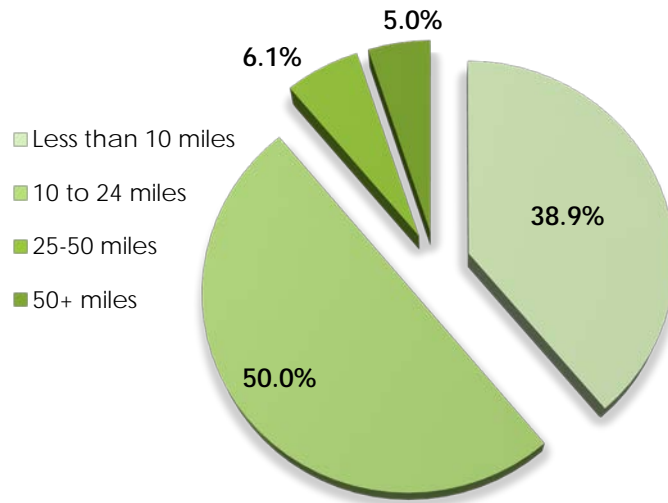
Interestingly, 21,556 (73.7%) of those residing in Greater Downtown travel outside the area for employment. However, while the majority leave, they do not travel far. According to 2010-2014 American Community Survey (ACS) data, the majority of those who live in the downtown area travel less than 30 minutes to work while only 28% travel more than 30 minutes.



The desirability of an area as a place to live is influenced by multiple factors including the quality of schools, access to entertainment and recreation, safety, access to employment, neighborhood aesthetics, etc. One of these factors, employment access, encompasses not only the availability of well-paying jobs, but also the physical access to them. An integrated transportation system is important for communities, not only because it facilitates trade, exchange and travel, but also affects the ability of businesses to recruit and retain talent.

The Miami Downtown area has significant regional connectivity due to road infrastructure and rail integration. Its proximity to two major highways, Interstate 95 and State Road 836, and two heavy rail systems, Tri-Rail and Metrorail, would imply relatively easy workplace access to those residing outside the immediate area. U.S. Census data shows that the majority of workers in the DDA area travel from places within Miami-Dade County, with a commute of 24 miles or less (89%). However, over 10,000 downtown workers travel from Broward County or further north.

**Figure 3: Commute to Work**



**Table 10** expands upon the map on the previous page, showing the dispersion of the downtown workforce across Miami-Dade County. Downtown employees travel from all directions in the county, with almost half (47.0%) traveling from the North and Northwest and 46.4% from the South and Southwest.

**Table 10: Origin of Travel to Work for Downtown Workers Residing in Miami-Dade County, 2014**

| Direction | Count   | Percentage |
|-----------|---------|------------|
| North     | 41,191  | 27.0%      |
| Northeast | 4,536   | 3.0%       |
| Northwest | 30,542  | 20.0%      |
| East      | 2,114   | 1.4%       |
| Southeast | 729     | 0.5%       |
| South     | 2,652   | 1.7%       |
| Southwest | 41,040  | 26.9%      |
| West      | 29,716  | 19.5%      |
| Total     | 152,520 | 100%       |

Source: On the Map; U.S. Census Bureau.

The above analysis provides a description of the DDA workforce through publicly available data from official government sources such as the U.S. Census Bureau. The following section focuses on the DDA workforce views and opinions through a survey covering a range of topics.

## Downtown Employee Survey Results

The Miami Downtown Worker Survey was conducted online, and in person with over 400 employees in the area. The survey was distributed online via a survey link that was sent to downtown businesses, and the in-person surveys were collected directly from a random selection of business establishments. With a 95% confidence interval (+/- 2.5%), there were a total of 423 completed surveys (17 in person and 306 online). The mixed method of data collection was necessitated by the recognition that some of the employees in the area may not have access to internet. The analysis below shows the distribution of responses for each question.

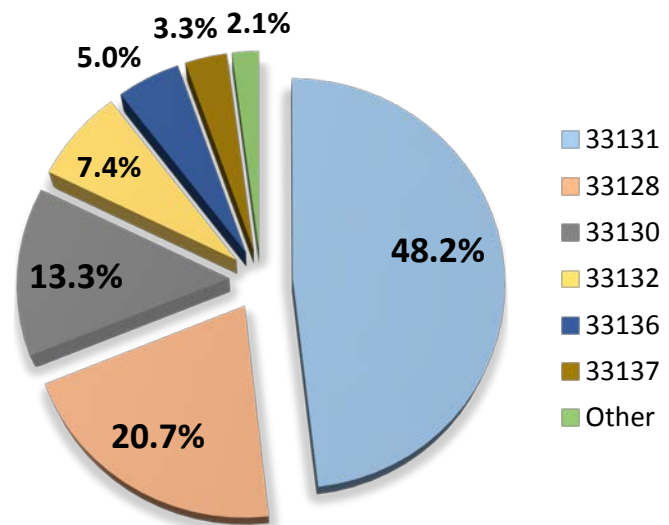
### Survey Participant Profile

As seen in **Figure 4**, most participants in the survey worked in 33131 (48.2%), 33128 (20.7%), and 33130 (13.3%).

The most common zip codes of residence were 33130 (25), 33131 (23), 33132 (18), 33137 (18), 33139 (15), with a quarter of all respondents living within downtown or the immediately bordering areas.

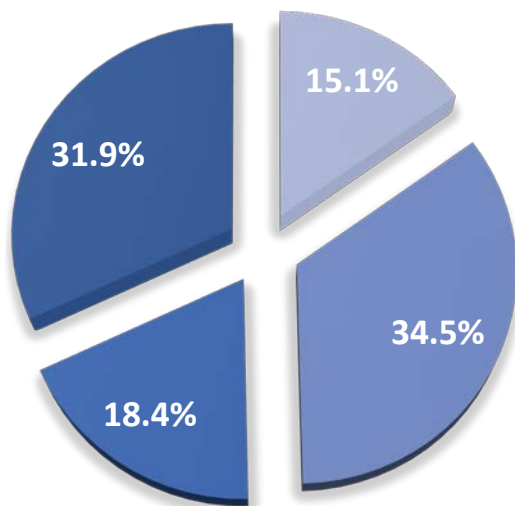
More females (63.1%) than males (36.9%) participated in the survey, and most respondents (47.7%) were married.

**FIGURE 4: WORK ZIP CODE**



**FIGURE 5: TENURE IN DOWNTOWN WORKPLACE**

■ < 1 year ■ 1 - 5 years ■ 5 - 10 years ■ 10+ years



The majority of respondents, 218, identified themselves as Hispanic, 140 as White, 36 as Black, 26 as “Other”, 9 as Asian, and 1 as Native American. Participants were able to mark multiple races or ethnicities.

The number of years that participants have worked downtown split down the middle, with 49.6% having worked downtown for 5 years or less and 50.3% having worked downtown over 5 years. Individual categories with a further breakdown of years of employment in the area can be viewed in **Figure 5**.

Most participants are over the age of 35 (68.1%) while only a third were between 18 and 34 (31.9%). The majority of participants are highly educated, with 67.5% having a Bachelor’s degree or higher.



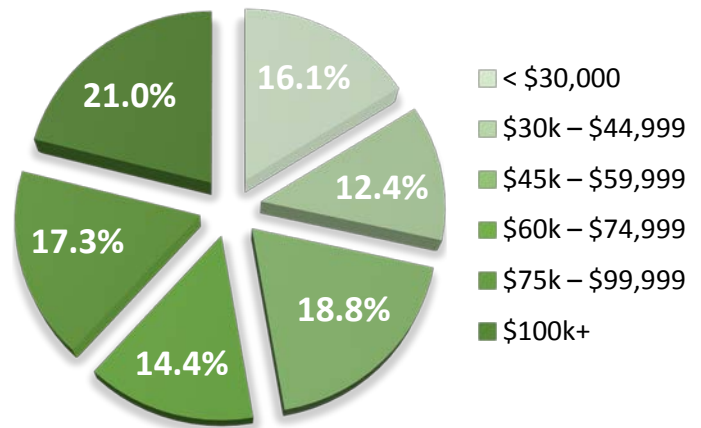
The respective incomes of the workers were relatively high, with over half making over \$60k (52.7%). The full range of incomes can be seen in **Figure 6**. The level of respondent education was highly related to their income. 38.6% of respondents with a Bachelor’s degree were earning over \$75K, while 53% of those with Masters, 81.8% of Professional, and 100% of Ph.D.’s earned over \$75K.

A third of participants were either the owner or manager of the business (29.1%), while the largest segment of respondents were general staff (42.7%). Of the smallest category, ‘Other’ with 2.9%, many were consultants and technical staff. Most respondents (71.6%) reported working with primarily domestic clients, while 25.9% worked with an international clientele, and 2.5% reported working with both equally.

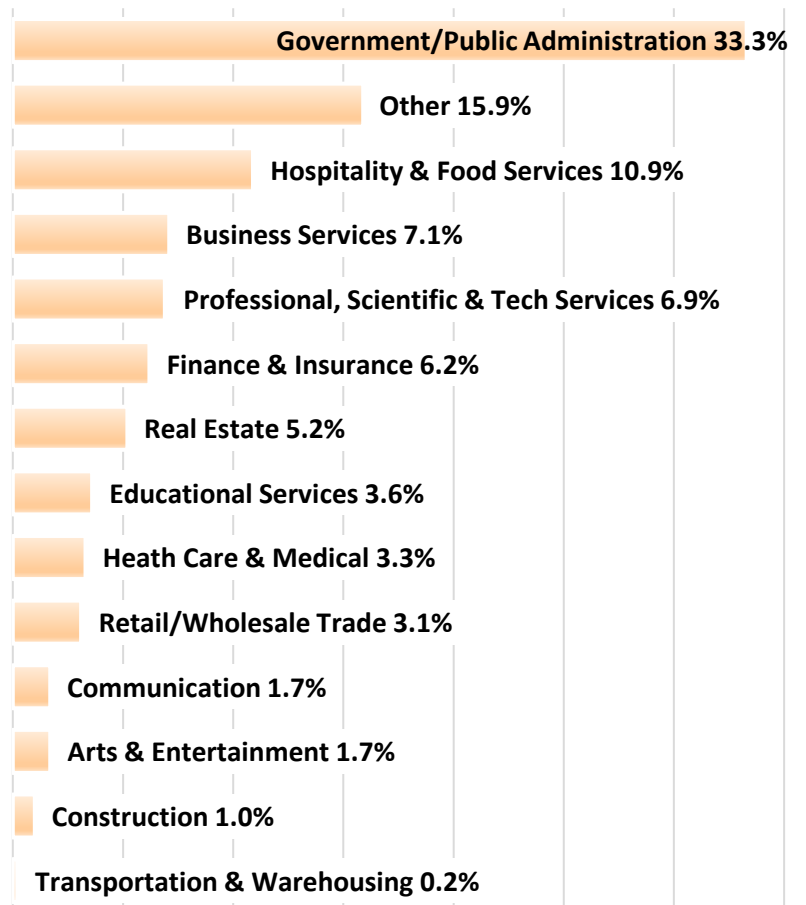
As seen in **Figure 7**, participants were representative of the diverse economy of Downtown Miami. Approximately a third of worker respondents are employed in Government and Public Administration. The next largest industry category selected, ‘Other’ at 15.9%, was largely comprised of those working in legal occupations.

Almost two-third of respondents (63.5%) reported using more than one language at work. Sectors that were significantly above this average included: Retail (92.3%), Healthcare (76.9%), Real Estate (76.2%), Hospitality (73.3%), and Other (69.0%). However, the number of respondents per sector is small: Retail (13), Healthcare (13), Real Estate (21), Hospitality (45), and Other (71). Two-thirds of workers in Business Services and Finance and Insurance reported using multiple languages at work.

**FIGURE 6: INCOME**



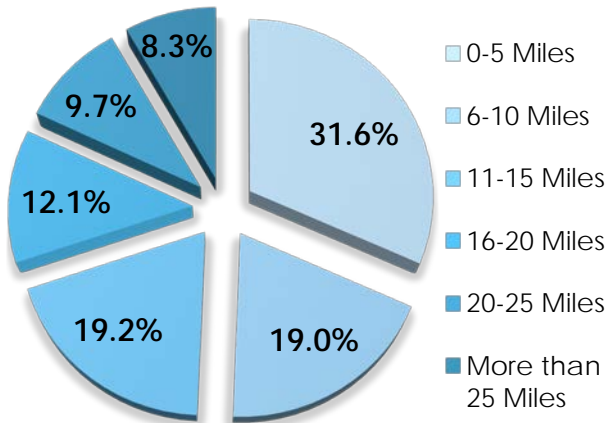
**FIGURE 7: DISTRIBUTION OF EMPLOYEES BY INDUSTRY**



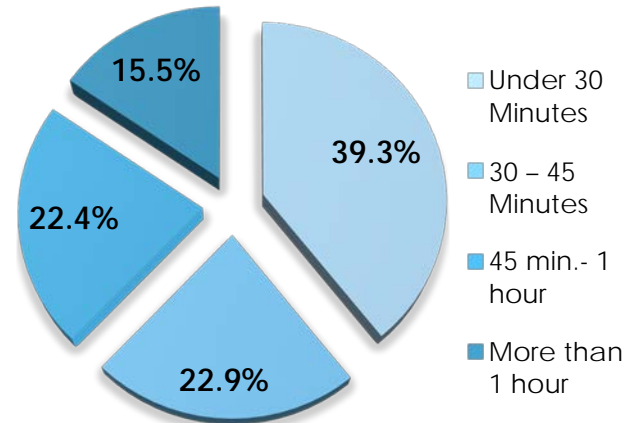
## Commuting

Corroborating the residential zip codes reported previously, a large number of respondents live in or near downtown. **Figure 8** shows the distribution of respondents by distance from their workplace in 5 mile increments. Approximately half of the respondents (50.6%) reside within 10 miles or less from their downtown workplace. Despite living close, 60.8% of all respondents drive over half an hour to work, as seen in **Figure 9**.

**FIGURE 8: WORKPLACE DISTANCE**

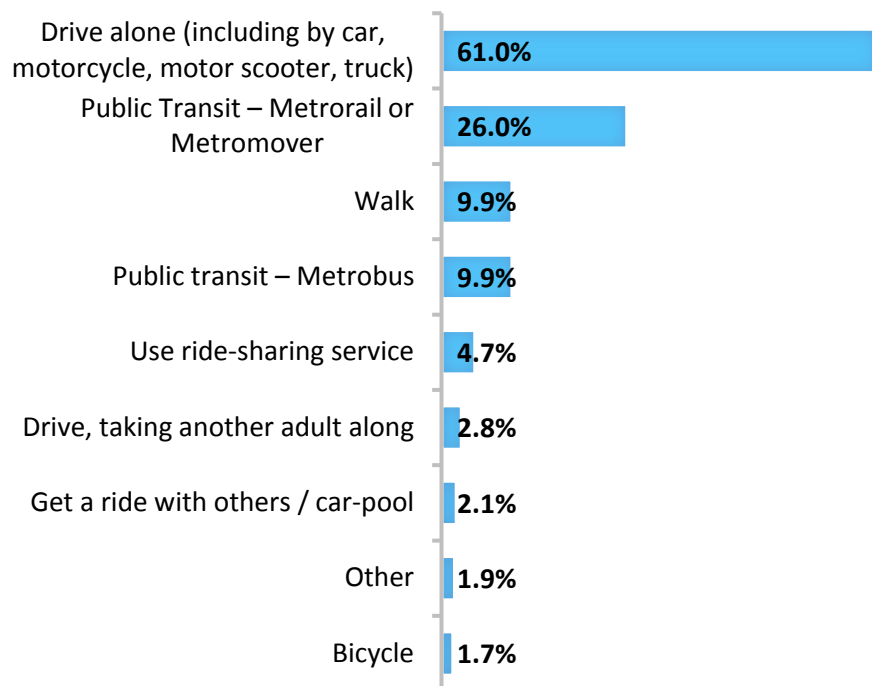


**FIGURE 9: LENGTH OF TRAVEL TIME**



The majority of respondents drive a vehicle to work (61.0%), while a third use public transit by way of the Metrorail/mover (26.0), or Metrobus (9.9%), as shown in **Figure 10**. Some rely on walking (9.9%), and 4.7% use new ride sharing services like Uber and Lyft. Approximately 53%, rely on car alone to get to work and do not combine multiple transportation modes in their commute. Given that downtown workers use multiple modes of transportation to reach work each day—roughly a quarter of respondents in our survey—the following percentages correspond to the number of individuals that use that mode at least once, and will thus be more than 100%.

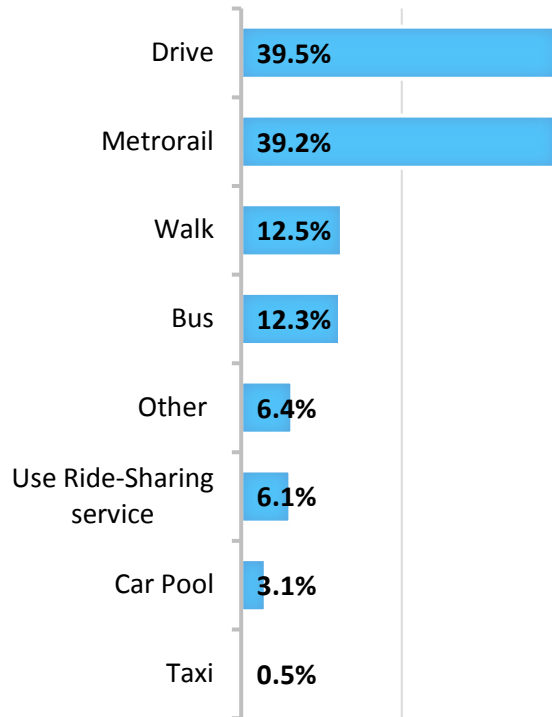
**FIGURE 10: COMMUTING TO DOWNTOWN**



When asked what mode of transportation they prefer to use to get to work, the majority of respondents split between driving their car (39.5%) and using the Metrorail (39.2%), as shown in **Figure 11**. Like the previous chart, respondents were able to indicate more than one mode of transportation and therefore the added percentages equal more than 100%. Importantly, half of the respondents who currently drive to work (61.0%) would prefer a different mode.

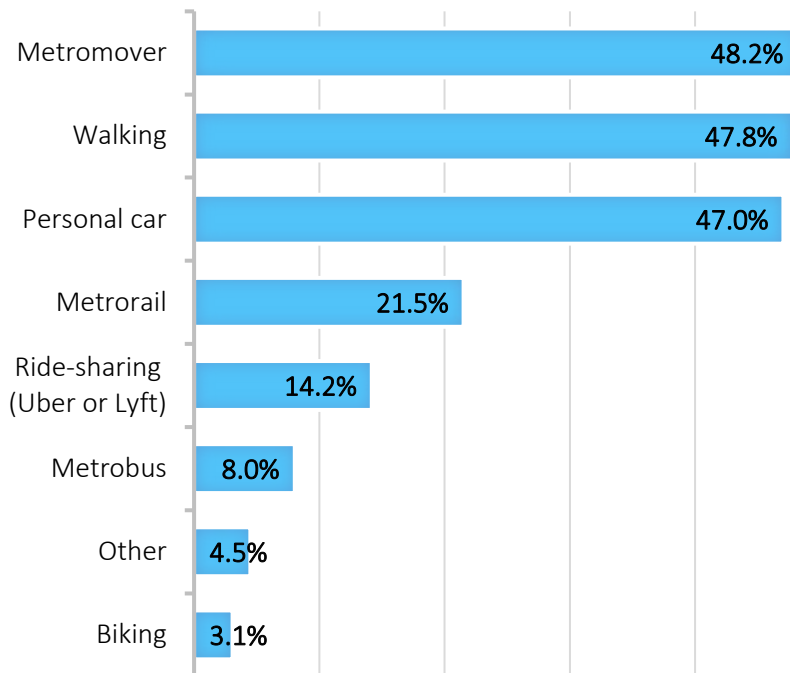
While congestion and commute times are a significant factor in the preference away from driving, so is parking. Only 54.0% of drivers had an employer-paid parking garage. Those that park in an employee-paid garage (17.5%), pay on average \$13.42 a day. Respondents that park in a lot on their own (8.8%) pay \$8.30 and those that park on the street (3.6%), pay \$9.91 a day.

**FIGURE 11: TRAVEL PREFERENCE**





**FIGURE 12: GETTING AROUND DOWNTOWN**



During a typical workday in Downtown Miami, participants utilize the full range of mobility options. Notably, following their transportation preferences, respondents reported using transit to get around downtown. As shown in **Figure 12**, almost half of participants reported using the Metromover (48.2%), walking (47.8%), and using their car (47.0%), likely because many of these are used in combination with the other modes. Less than a quarter (21.5%) actually use of Metrorail, a percentage far lower than those who reported the Metrorail as a preferred transportation mode (39.2%).

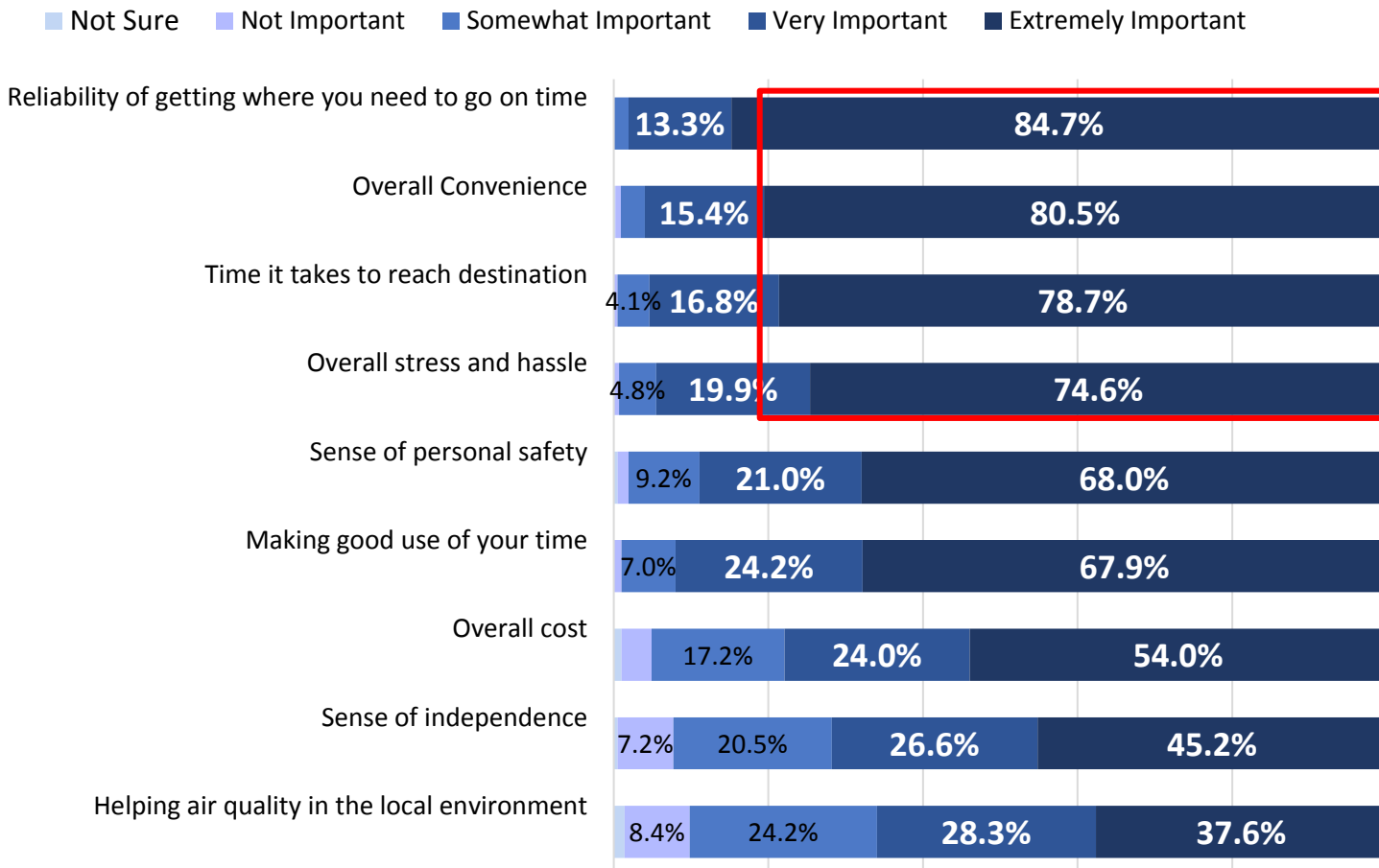


Photo Credit: Miami DDA

Participants were asked which roads and intersections they found the best and worst while commuting to work downtown and could list up to three. A few respondents did not find any intersections or roads good enough to merit distinction, with the largest number of responses (26) writing in “none”. However, when listing which roads are the worst, an overwhelming majority (90) cited Brickell Avenue, while Biscayne Boulevard also received a large number of mentions at 40. A significant number (28) also mentioned bridges as a major reason for traffic congestion, and most of them mentioned the bridge along Brickell Avenue over the Miami River.

Survey participants were asked about the factors influencing their selection of transportation and the results are shown in **Figure 13**. Reliability, convenience and comfort seem to be the driving factors in mode choices, while cost is of lesser importance. The vast majority cited reliability (84.7%), convenience (80.5%), time to destination (78.7%), and overall stress and hassle (74.6%) as extremely important factors in choosing their mode of transportation. Factors that respondents reported the fewest responses of extremely important were sense of independence (45.2%) and environmental concerns (37.6%).

**FIGURE 13: FACTORS INFLUENCING MODE USE**

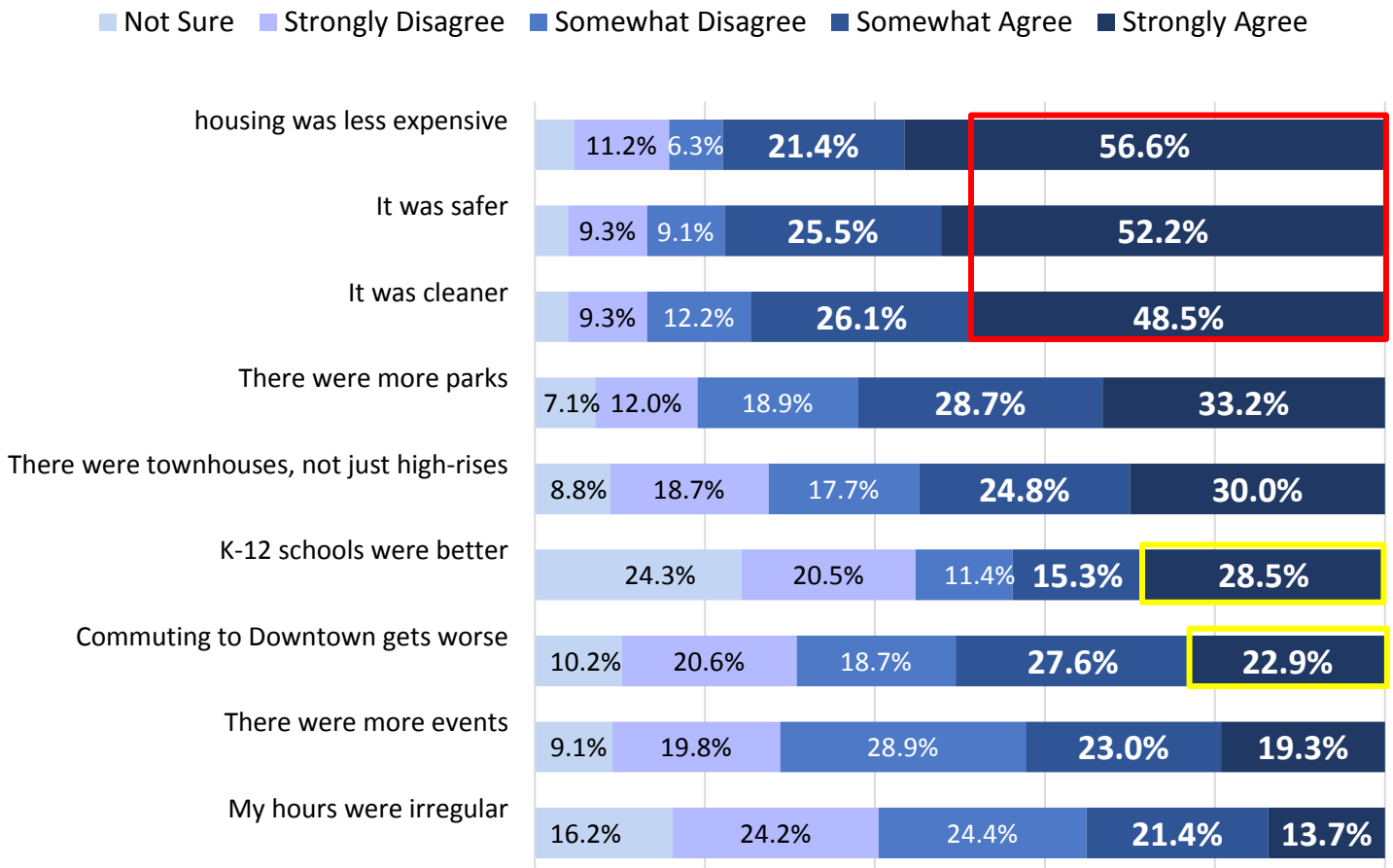




## Relocation

Downtown workers were asked to indicate their agreement with statements pertaining to factors that would influence their decision to relocate to the area. Results are listed in **Figure 14**. The factors which would have a strong influence on the largest percentages of respondents included: if housing was less expensive (56.6%), if Downtown Miami was safer (52.2%), and if it was cleaner (48.5%). Notably, other factors, typically considered important in residents' choice of neighborhood, such as school quality (28.5%) and traffic when commuting (22.9%) were not considered significant factors on the respondents' decision to move downtown. In terms of access to good schools, breaking down the respondents by those with and without children reveals some significant differences. Those with children (44.9%) strongly agreed that if schools were better they would live downtown, compared to only 20.9% of those without children.

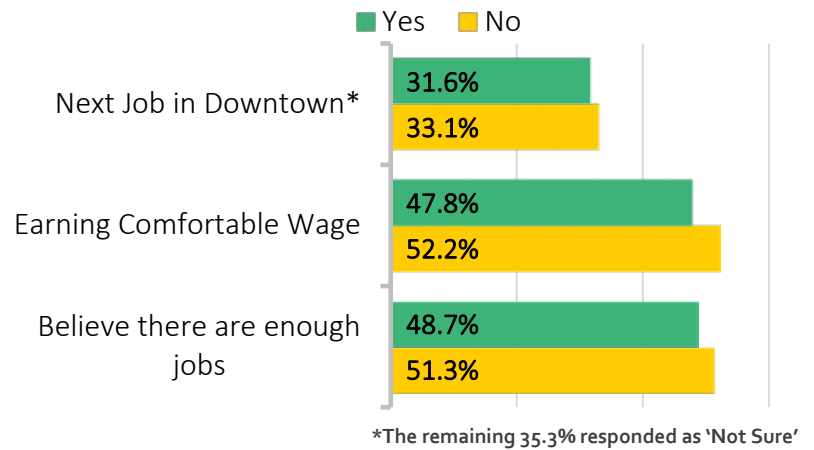
**FIGURE 14: I WOULD LIVE IN DOWNTOWN MIAMI IF**



## Economic Opportunity

Respondents had mixed views on economic opportunities in the downtown area, as shown in **Figure 15**. Participants were evenly split in thirds, whether their next job would be in Downtown Miami, with 31.6% saying yes, 33.1% saying no, and 35.3% unsure. The respondents are almost evenly split with regards to wages, with 52.2% believing they earn a comfortable wage for the cost of living in Miami, and 47.8% disagreeing with that statement. The split is similar with regards to the perception of availability of jobs, with 48.7% respondents believing that there are sufficient job opportunities in Downtown Miami.

**FIGURE 15: ATTITUDES TOWARDS ECONOMIC OPPORTUNITIES IN DOWNTOWN**



**Table 11: Desired Employment Sector Growth**

| Industry                                 | Percent |
|--|---------|
| Professional, Scientific & Tech Services | 17.1%   |
| Arts & Entertainment                     | 15.5%   |
| Government/ Public Administration        | 10.3%   |
| Health Care & Medical                    | 10.3%   |
| Business Services                        | 8.9%    |
| Other                                    | 8.2%    |
| Hospitality & Food Services              | 7.6%    |
| Educational Services                     | 5.3%    |
| Retail/Wholesale Trade                   | 4.7%    |
| Finance & Insurance                      | 4.2%    |
| Communication                            | 3.7%    |
| Transportation & Warehousing             | 1.8%    |
| Real Estate                              | 1.6%    |
| Construction                             | 0.8%    |

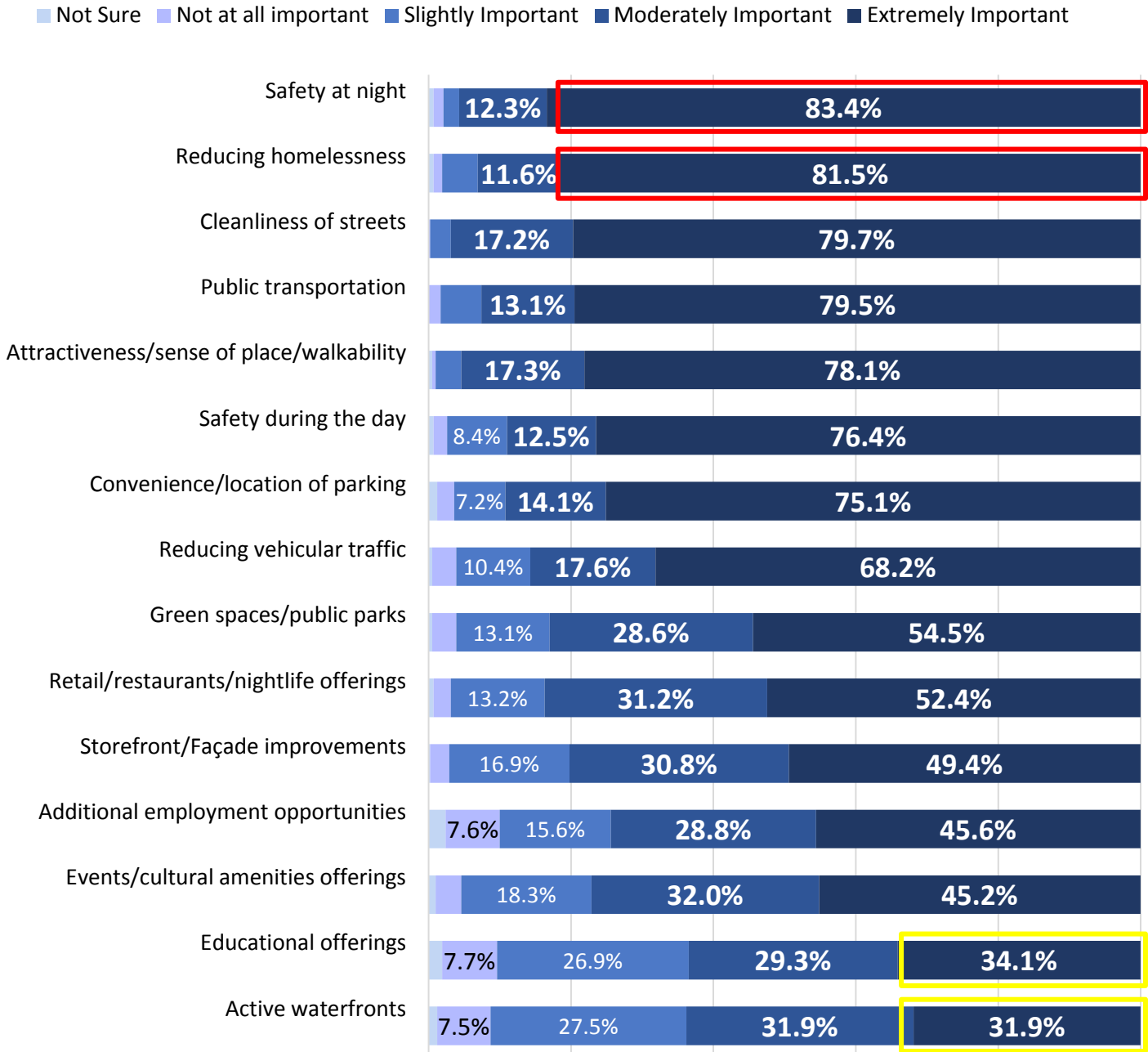
The industry sectors in which downtown workers would like to see more job creation include some high-wage sectors, but also sectors that contribute to the vitality of the area. All sectors and their respondent percentage are listed in **Table 11**.

More than half of the responses pointed to four industry sectors which are already well represented in the area. Professional, Scientific and Technical jobs were most frequently indicated, followed by Arts and Entertainment employment opportunities. Despite the significant contribution of the Real Estate and Construction sectors to the Downtown Miami boom, these ranked at the bottom with the fewest responses.

## Desired Improvements

Respondents consistently indicated the need for multiple improvements across all areas suggested in the survey. Only two categories were seen as extremely important by over 80% of participants, safety at night and reducing homelessness, 83.4% and 81.5% respectively. In contrast, only two categories garnered less than 40% support for improvement, educational offerings and active waterfronts, 34.1% and 31.9% respectively. The full results can be seen in **Figure 16**.

**FIGURE 16: DESIRED IMPROVEMENTS**



The Miami DDA Business Report is the product of the collaboration between the **Miami Downtown Development Authority** and the **Florida International University Metropolitan Center**.

The **Miami DDA** is an independent public agency of the City of Miami funded by a special tax levy on properties in its district boundaries. The Mission of the Miami Downtown Development Authority is to grow, strengthen and promote the economic health and vitality of Downtown Miami. As an autonomous agency of the City, the Miami DDA advocates, facilitates plans and executes business development, planning and capital improvements, and marketing and communication strategies.

The **FIU Metropolitan Center** is an applied research and training institute in the Steven J. Green School of International and Public Affairs. It provides policy solutions to public, private and non-profit organizations in South Florida. Established in 1997, the Metropolitan Center has an impressive track record of providing quality services to communities through various social science research studies including economic development plans, housing needs assessments, community indicator studies, economic impact analyses, surveys and focus groups. In addition, the Metropolitan Center has organized workshops, conferences and retreats as well as public opinion forums to address specific urban issues.

The Miami DDA Business report was developed by:

Miami DDA

**Nicholas Martinez, AICP**

AICP | Applied Research + Analytics, Team Leader

**Paris Williams, Research & GIS Coordinator**

The Metropolitan Center

Principal Investigator:

**Maria Ilcheva, Ph.D., Senior Research Associate**

Contributing Researchers:

**Nohely Alvarez**

**Matthew Walker**

**Daniela Waltersdorfer**

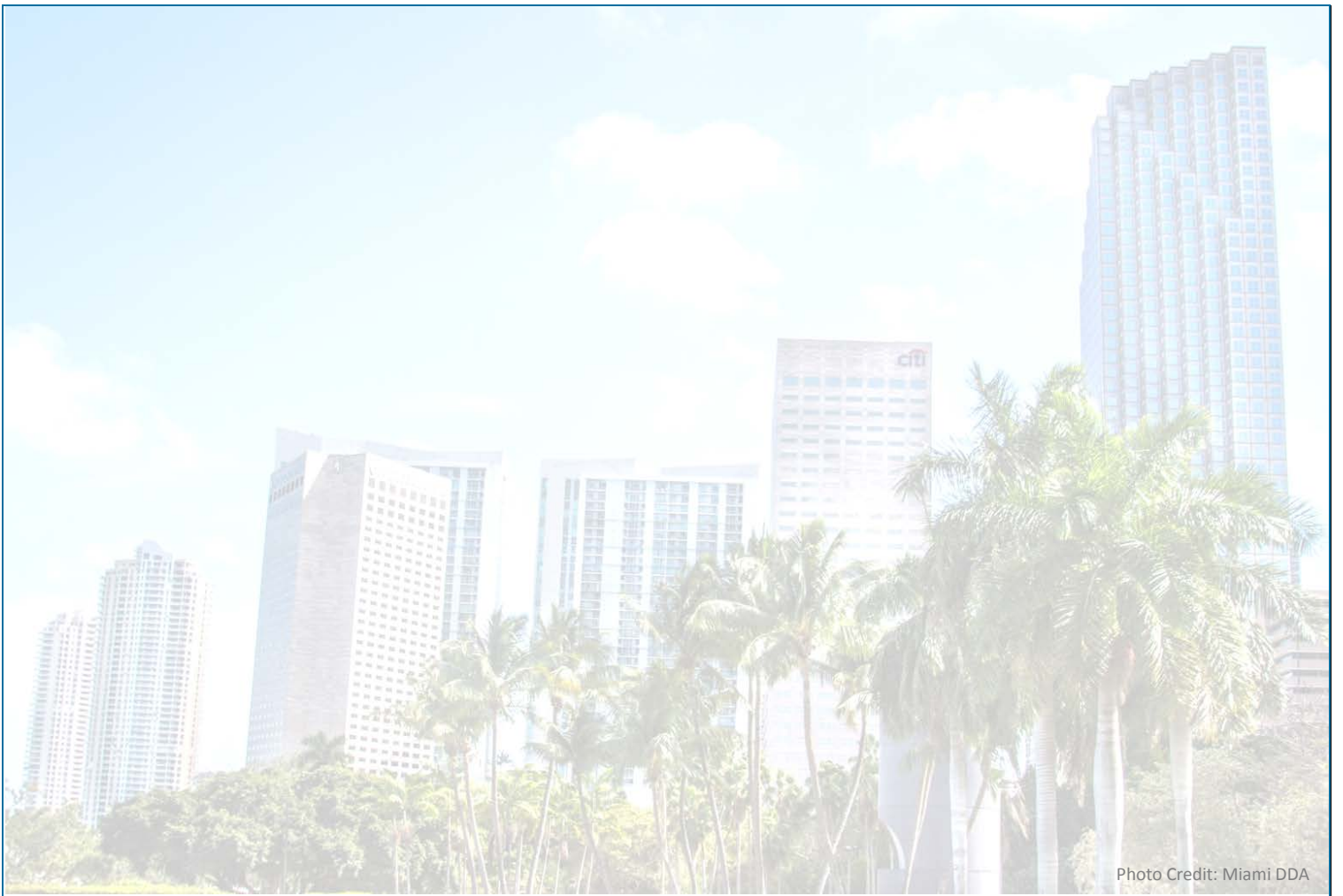


Photo Credit: Miami DDA

**FIU** Metropolitan  
Center

**DWNTWN** MIAMI | **MIAMIDDA**  
DOWNTOWN DEVELOPMENT AUTHORITY

Contact Information:  
200 S. Biscayne Blvd, Suite 2929  
Miami, Florida 33131

T - 305.579.6675  
F - 305.371.2423  
W - [MiamiDDA.com](http://MiamiDDA.com)