

Naranja Lakes Community Redevelopment Agency

Competitive Assessment



May 2019



UrbanCentric Analytics
STRATEGIC PLANNING & ANALYSIS

The Naranja Lakes CRA Board of Directors

Kenneth Forbes, Chair

Stuart Archer, Vice-Chair

Alex Ballina

Kametra Driver

Jeanne Foster Jacobs, Ph.D.

Sandra Gilley

Rene Infante

Philip Marraccini

Mark Wilson

Miami-Dade County Commissioners

Dennis C. Moss – District 9

Daniella Levine Cava - District 8

Miami-Dade County Staff

Jorge Fernandez, Office of Management & Budget

Jason Emilio Rodriguez, Office of Management and Budget

Economic Development Coordinator

Kevin T. Greiner, UrbanCentric Analytics

Ralph Rosado, PhD, Rosado & Associates

Table of Contents

Introduction..... 1

Community Assets.....3

Population Demographics.....5

Industry Structure..... 11

Labor Force..... 19

Household Income..... 23

Housing 27

Safety & Security..... 39

Land Use, Real Estate & Transportation Demand 41

Introduction

Overview

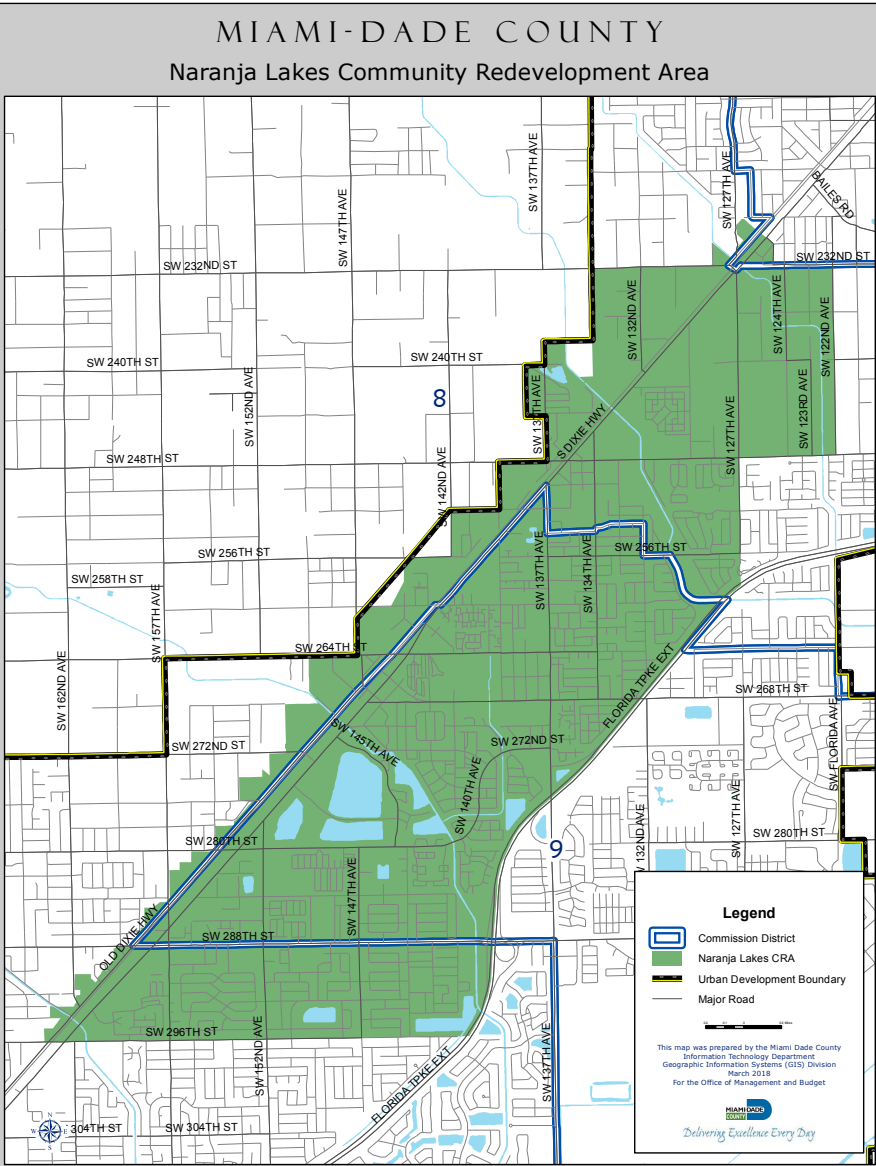
The Naranja Lakes Community Redevelopment Area is located along both sides of US-1 in South Miami-Dade, from just north of SW 232nd street to SW 296th Street. The Community Redevelopment area includes the communities of Goulds, Princeton, and Naranja. The Naranja Lakes Community Redevelopment Agency (CRA) was created in 1998 to eliminate slum and blight, and implement community redevelopment policies for the benefit of its residents. The Area continues to undergo a rapid transformation from rural area to a bedroom residential community.

This **Competitive Assessment** is the first document in the CRA’s development of a new Action Plan to inform the community and guide its decision making, program development, and resource allocation over the next 10 years. The Competitive Assessment provides the analytical foundation for the development of programs, policies, and budget making decisions contained in the final **Naranja Lakes Community Redevelopment Agency Action Plan**.

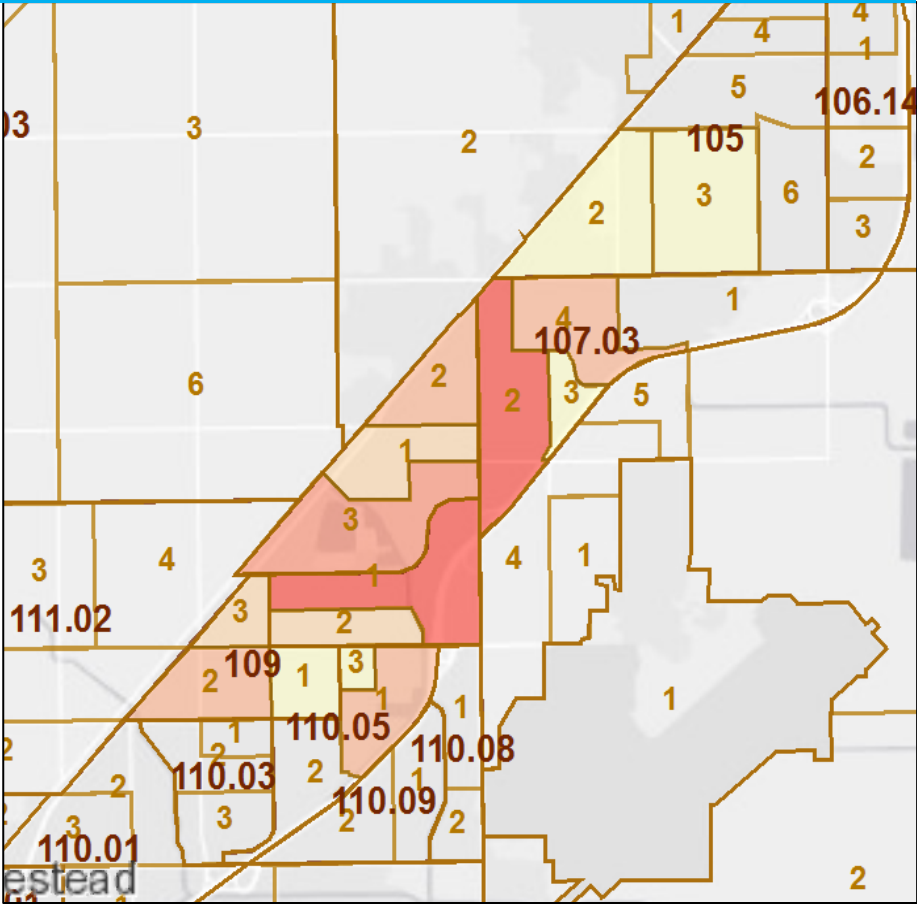
The CRA and its Market Area

The data used for the analysis in this study is from the US Census Bureau, American Community Series, third-party real estate, business and economic database services, and the Miami-Dade County assessor’s property database. The bulk of the data resources are only available at the Census Block Group level. For that reason, all analysis of the CRA has been collected for 15 Census Block Groups that conform nearly, but not completely, to the boundaries of the Naranja Lakes CRA. They are: Census Tract 105, Block Groups 2 & 3, Census Tract 107.03, Block Groups 2, 3 & 4, Census Tract 108.01, Block Groups 1 & 2, Census Tract 108.02, Block Groups 1, 2 & 3, Census Tract 109, Block Groups 1, 2 & 3, and Census Tract 110.05, Block Groups 1 & 3.

The CRA is the commercial and residential anchor to the communities, market, and properties that surround it. Understanding the CRA’s **Market Area** — defined as the area within a roughly 5.5-mile radius of the center of the CRA — is crucial to understanding the CRA. Economic data for the analysis of the CRA Market Area is available at the Zip code level, and is defined as Zip Codes 33030, 33031, 33032, 33033, 33034, 33035, 33039, 33170, 33177, 33187, 33189 and 33190.



Block Groups Used for Analysis



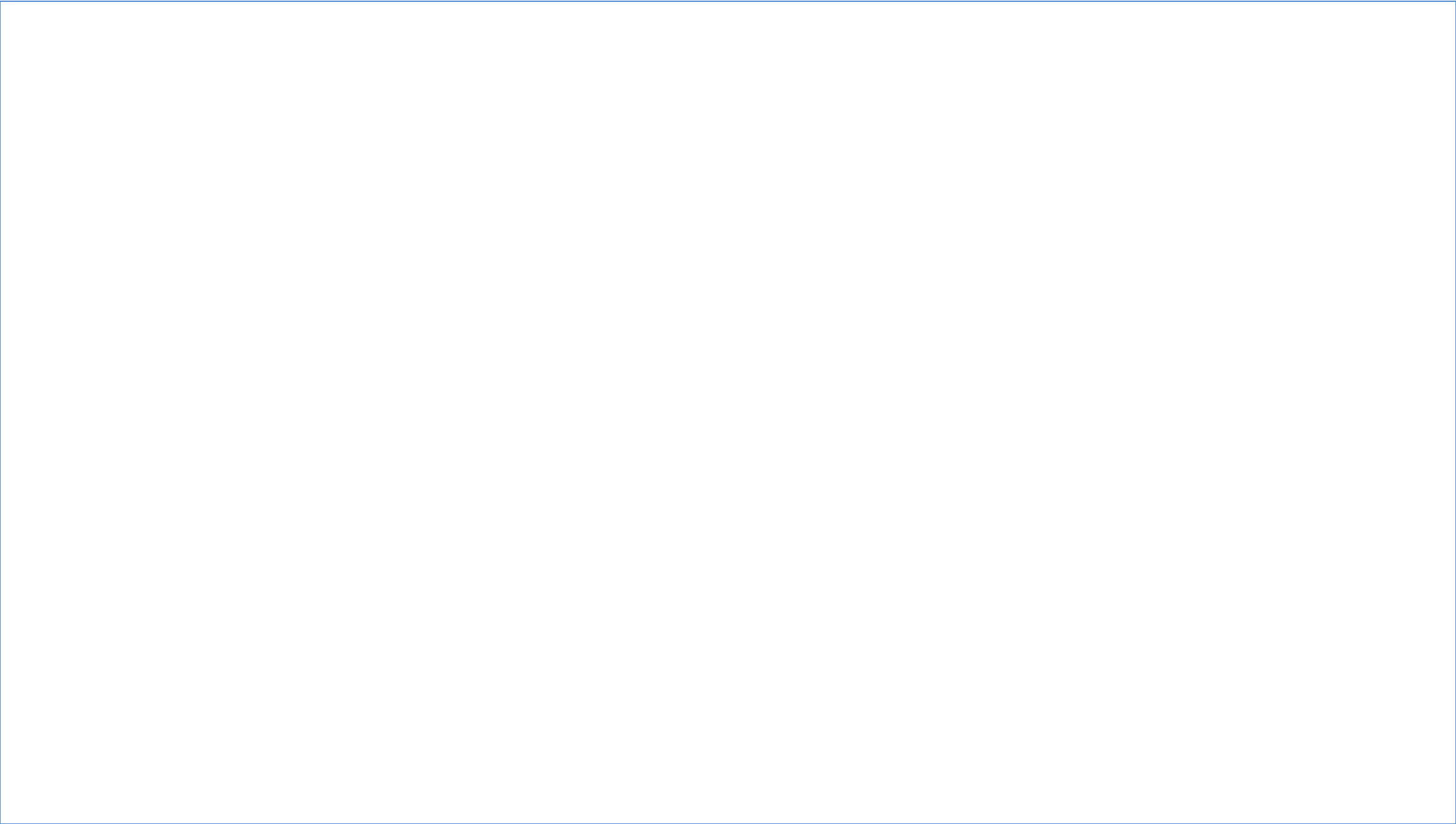
Community Assets

The Naranja Lakes CRA is Miami-Dade County's southern gateway to Homestead and the Florida Keys. The CRA is historically the commercial center of the County's extremely important agricultural industry. Since 2000 the southern communities along the US-1 corridor have undergone significant change, emerging as major residential communities, with development and population growth accelerating since 2010.

The CRA Market Area is home to a wide range of economic, infrastructure, educational, cultural, and tourism assets. The major assets within an 8-mile radius of the Center of the CRA include:

- Five Miami-Dade County Targeted Urban areas, all along US-1. Three are partly or completely within the CRA;
- Six of the County's 67 Federal Opportunity Zones. The Census Tract 110.05 Opportunity Zone is almost completely within the CRA Boundaries.
- Multiple University and College Campuses, including the Miami-Dade College Southern Campus, Barry University South Campus, the University of Florida Tropical Research and Education Center, and the proposed 48-Acre Larkin Community Hospital Health Science Campus.
- The Homestead Air Reserve Base, which is capable of landing most commercial and passenger airline jets, the Homestead General Aviation Center - a small business airport, and five private airstrips and landing fields for small plane traffic.
- Multiple major County parks, Lakes, and nature areas.
- Multiple themed tourist attractions, including Zoo Miami, Monkey Jungle, the Coral Castle Museum, the Everglades Alligator Farm, the Redland Ranch, Phil's Berry Farm, the Redland Market Village, and Knaus Berry Farm.
- Within 8 Miles of the everglades, and 6.5 miles from **Biscayne National Park**, the Nation's only **underwater** National Park.
- 4.24 Miles to the Homestead International Speedway, a fully NASCAR Sanctioned race facility.

- The CRA borders on the southern portion of the Florida Turnpike, and includes three Florida Turnpike Exits
- The CRA is only 36 Miles to Key Largo and the northern entrance to the Florida Keys.



Population Demographics

A Major Demand Market

The total population living within the CRA is 37,601 people, representing 1.4 percent of the population of the County. However, the CRA is the center of a major population center, purchasing and demand market. 398,672 people live within a 10-mile radius of the CRA, or 15 percent of the County’s population. ***If this area was its own City, it would be the third largest City in Florida — larger than Tampa, Orlando, and Fort Lauderdale.***

| Florida's Largest Cities | |
|--------------------------------------|----------------|
| | Population |
| Jacksonville city, Florida | 867,313 |
| Miami city, Florida | 443,007 |
| Naranja Lakes CRA Market Area | 398,672 |
| Tampa city, Florida | 368,087 |
| Orlando city, Florida | 269,414 |
| St. Petersburg city, Florida | 256,031 |
| Hialeah city, Florida | 237,523 |
| Tallahassee city, Florida | 188,463 |
| Port St. Lucie city, Florida | 178,778 |
| Fort Lauderdale city, Florida | 177,175 |
| Cape Coral city, Florida | 173,679 |
| Pembroke Pines city, Florida | 166,530 |

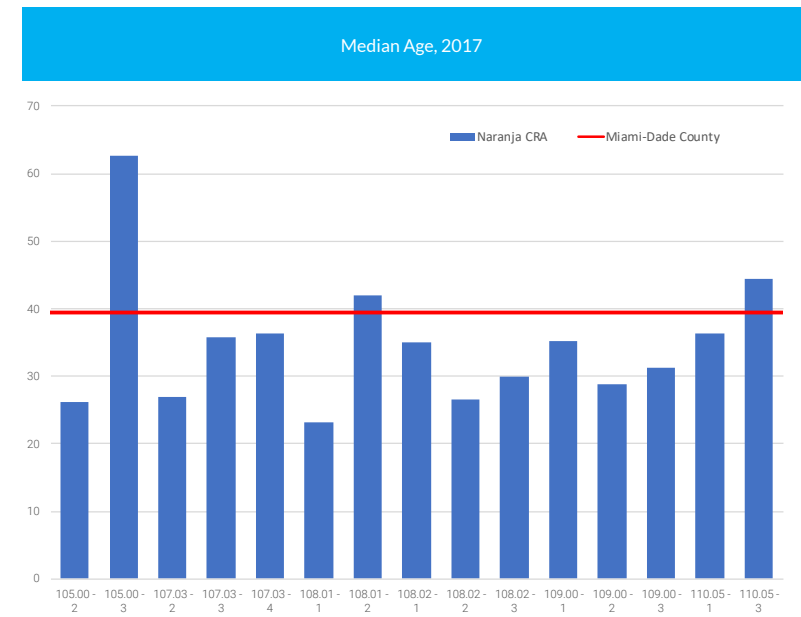
Source: 2009-2013, 2013-2017
American Community Survey 5-Year Estimates

A Rapidly Growing, Young Population

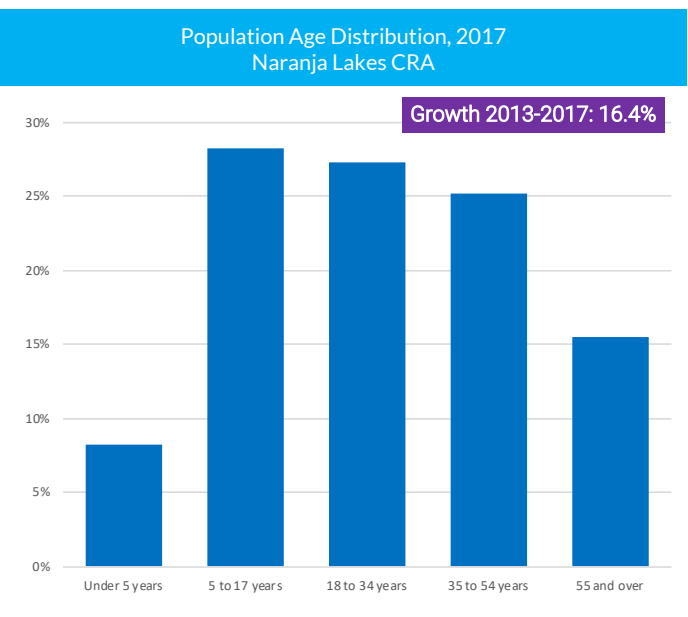
The Naranja Lakes CRA is one of the fastest growing areas of the County. ***Total CRA population growth, at over 16 percent from 2013 to 2017, has been more than two-and-one-half times the total population growth of the County.*** At its current rate of growth, total population of the CRA would be nearly 43,000 by 2020, and over 52,000 by 2025.

The population of the CRA is also considerably younger than the rest of the County. Key CRA demographic trends include the following:

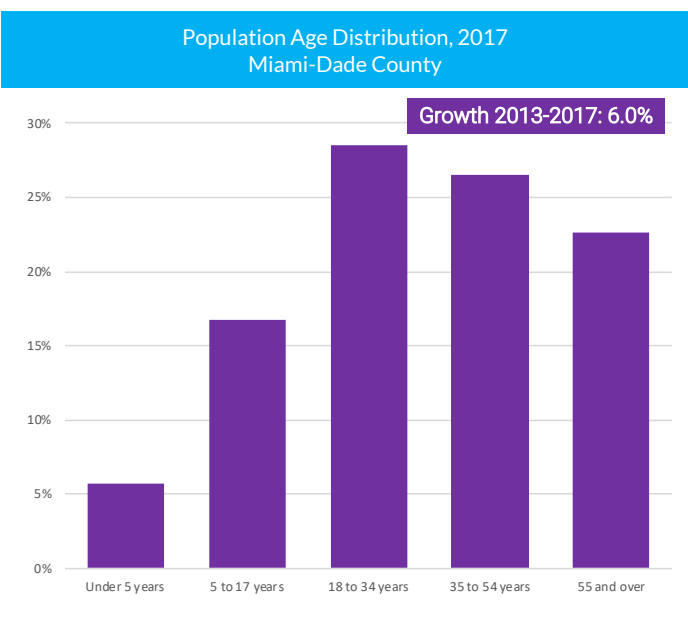
- The median age in 12 of 15 block groups in the CRA are lower than the County median of 39.5. One tract, however, 105.00 -3, bucks the trend with a median age of 62;
- The median age of 9 of 15 block groups in the CRA has dropped from 2013 to 2017;
- Children under the age of 18 make up a considerably larger portion of the CRA’s population than the County. Children under 18 make up 36 percent of the CRA, compared to only 22 percent for the County;
- Children under 18 represent the fastest growing segment of the CRA’s population, growing by 39 percent, more than 3.5 times more than the County as a whole, indicating a significant influx of families with small children;
- The CRA’s millennial population (23 to 38) makes up nearly the same percentage as the County, and has grown at the same rate. The CRA’s percentage of persons of prime workforce age (35 to 54), is nearly the same as the County, but has grown, rather than receded; and
- At 8 percent of the population, the CRA has a markedly smaller proportion of seniors (65+) than the County (13 percent), and a significantly smaller proportion of 55+ residents — only 15 percent compared to 23 percent for the County. However, the CRA’s total senior population has grown by 19 percent from 2013 to 2017.



Source: 2009-2013, 2013-2017 American Community Survey 5-Year Estimates



Source: 2009-2013, 2013-2017 American Community Survey 5-Year Estimates



Source: 2009-2013, 2013-2017 American Community Survey 5-Year Estimates

| Population by Age | | | | | | | | | | | |
|-------------------|-------------|-----|--------|-----|--------|-----------|-------------------|-----------|-----------|-------|--------|
| | Naranja CRA | | | | | | Miami-Dade County | | | | |
| | 2013 | | 2017 | | Growth | | 2013 | | 2017 | | Growth |
| Total Population | 32,317 | | 37,601 | | 16.4% | | 2,549,075 | | 2,702,602 | | 6.0% |
| Age | | | | | | | | | | | |
| Under 5 years | 2,813 | 9% | 3,110 | 8% | 11% | 152,561 | 6% | 153,517 | 6% | 0.6% | |
| 5 to 17 years | 7,049 | 22% | 10,597 | 28% | 50% | 394,228 | 15% | 452,082 | 17% | 14.7% | |
| 18 to 34 years | 7,965 | 25% | 10,263 | 27% | 29% | 601,915 | 24% | 770,443 | 29% | 28.0% | |
| 35 to 54 years | 9,150 | 28% | 9,472 | 25% | 4% | 750,174 | 29% | 717,271 | 27% | -4.4% | |
| 55 and over | 5,340 | 17% | 5,810 | 15% | 9% | 650,197 | 26% | 612,200 | 23% | -5.8% | |
| Under 18 | 9,862 | 31% | 13,707 | 36% | 39% | 546,789 | 21% | 605,599 | 22% | 11% | |
| 18 and over | 22,455 | 69% | 25,545 | 68% | 14% | 2,002,286 | 79% | 2,099,914 | 78% | 4.9% | |
| 65 and over | 2,481 | 8% | 2,941 | 8% | 19% | 366,719 | 14% | 346,259 | 13% | -5.6% | |

Source: 2009-2013, 2013-2017 American Community Survey 5-Year Estimates

Household Formation

Households are the basic purchasing unit of the economy. Household growth and structure drives demand for housing, goods and services. **Since 2013 the total number of households in the CRA grew by 13 percent, compared to 3.7 percent for the County.** The composition of households in the CRA also differs considerably from the rest of the County.

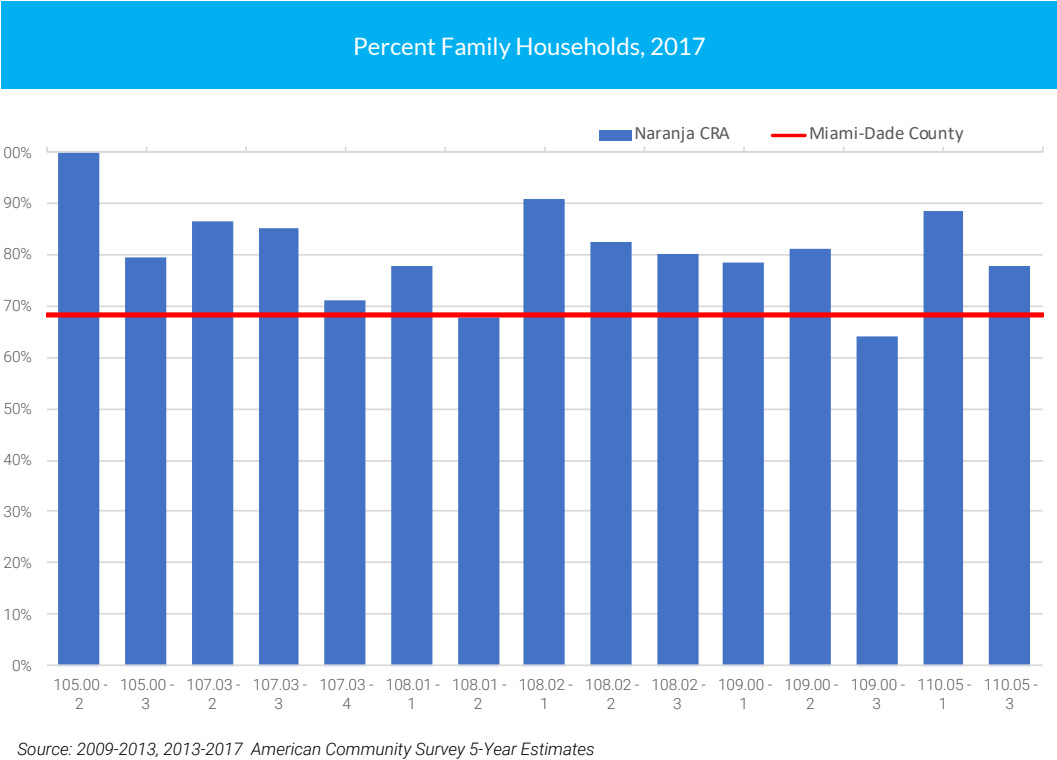
A Community of Families

The composition of family households in the County has held steady since 2013 at just over 68 percent. The proportion of family households in the CRA, however, is significantly higher. 79 percent of all households in the CRA are family households, and only two block groups have a lower percentage than the County.

A Community of Large Households

The County’s average household size has grown from 2.9 to 3.09 persons per household since 2011. The County has a high percentage of 1-person households, but the bulk of households (48 percent) are 2 and 3-person households. Across the County the percentage of households greater than 4 people has shrunk considerably.

The CRA, by comparison, has a much higher average household size. In general, Block groups across the CRA have a significantly lower percentage of 1-person households, and higher composition of both 2-person and 3, 4 and 5-or more person households. 11 of the 15 CRA Block Groups 10 percent more 3, 4 and 5-person or more households than the rest of the County. **Across the CRA, households of 3 or more represent 61 percent of all households compared to 45 percent for the County.**

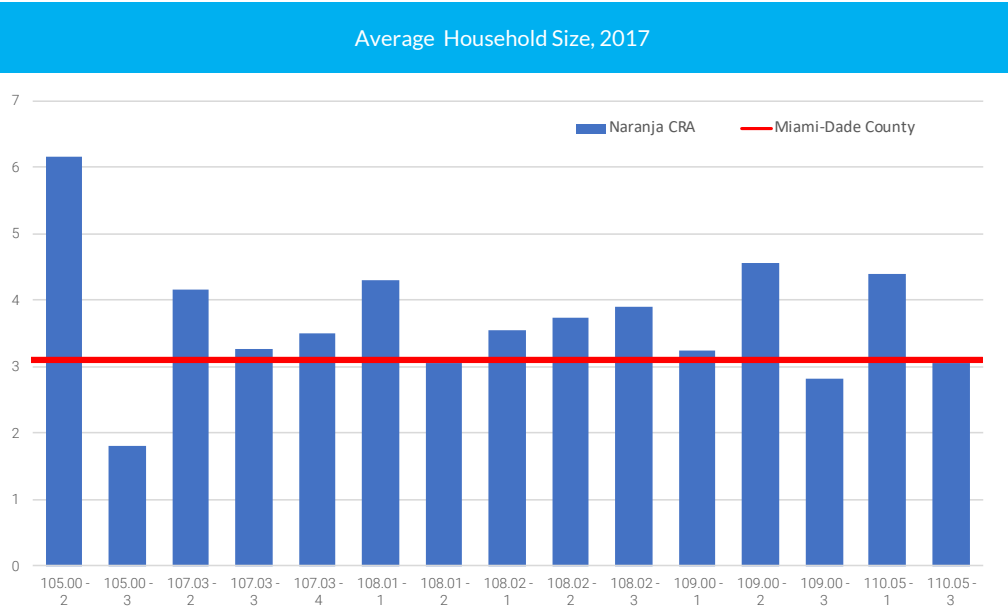


Wide Variation in Householder Age

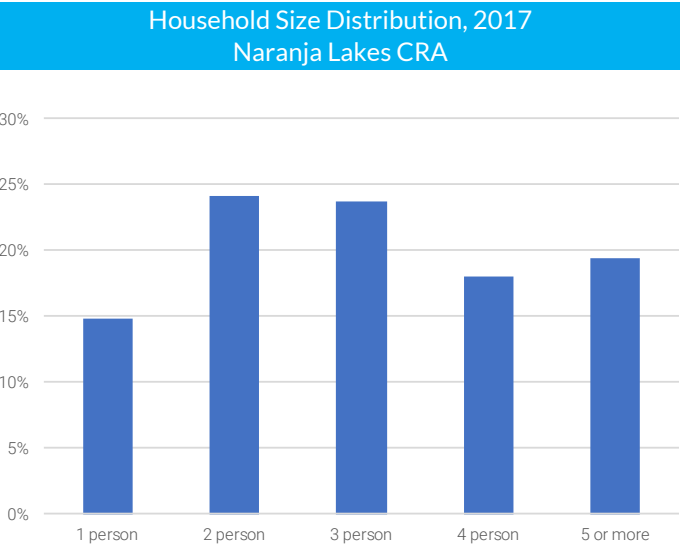
Maintaining a steady flow of new homeowners and renters is crucial to maintaining community economic sustainability. The entry of new homeowners into a market is also a key indicator of its desirability and market demand.

Across the CRA, the distribution of Millennial homeowners, mid-age, and senior homeowners largely mirrors the County, with two key differences:

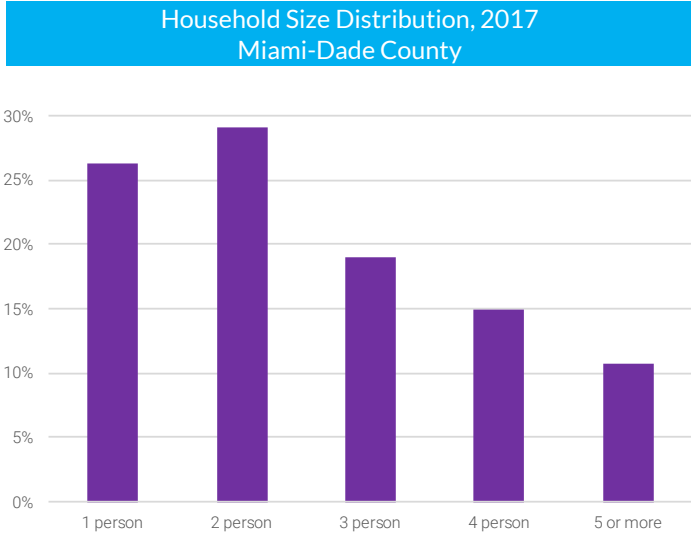
- The number of Millennial homeowners in the CRA has dropped slightly faster than the County, and;
- The percentage of Millennial and senior homeowners across the CRA varies from 0 to 33 percent of all homeowners. Younger and new householders are predominately moving into rental housing in the center of the CRA. ***The CRA’s stock of single-family housing is overwhelmingly occupied by older householders, with a severe shortage of younger households in the northern and southern portions of the CRA.*** This indicates that other issues, including education, crime, and housing stock price and availability, is dampening demand from new homebuyers in select neighborhoods in the CRA.



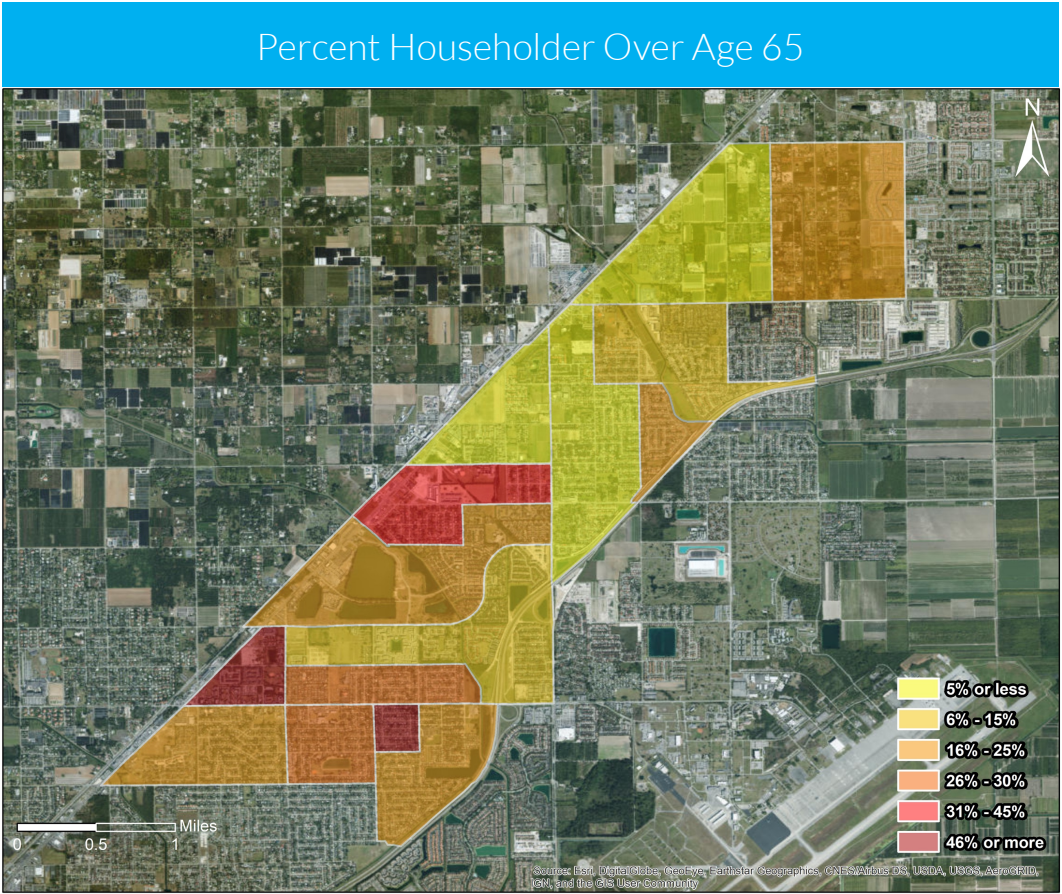
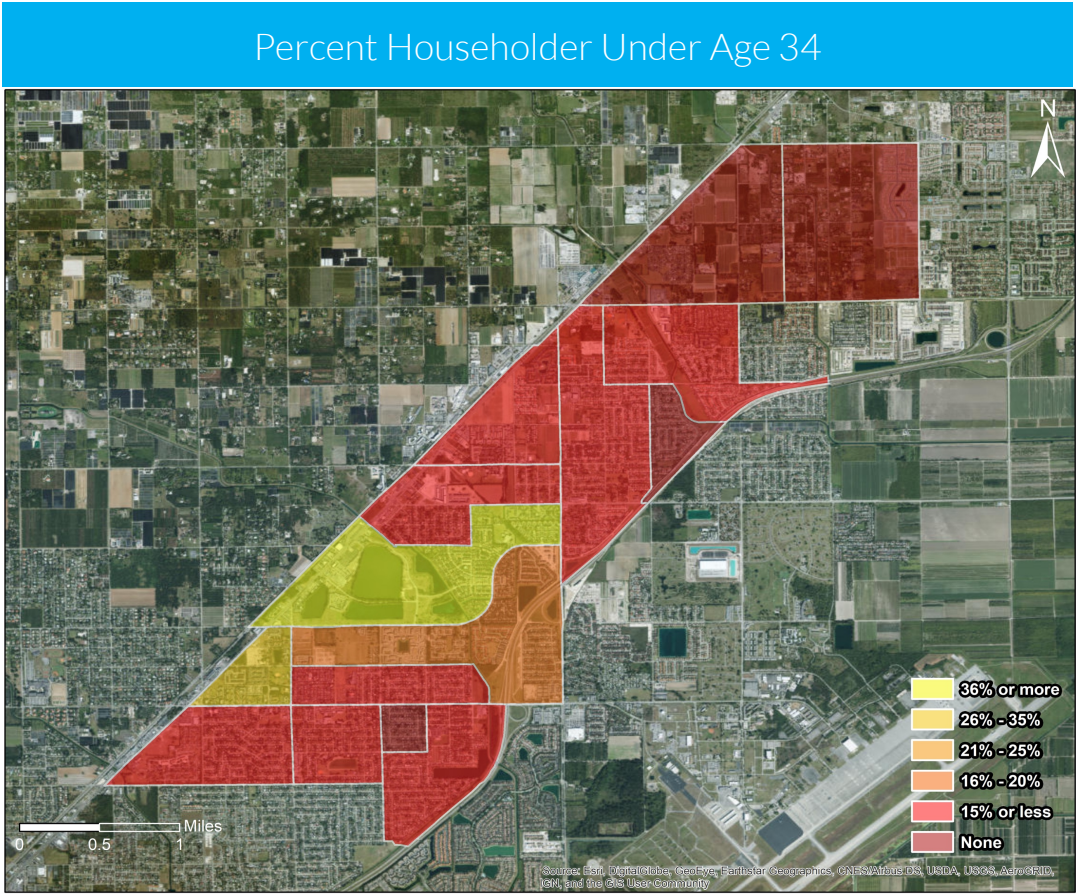
Source: 2009-2013, 2013-2017 American Community Survey 5-Year Estimates

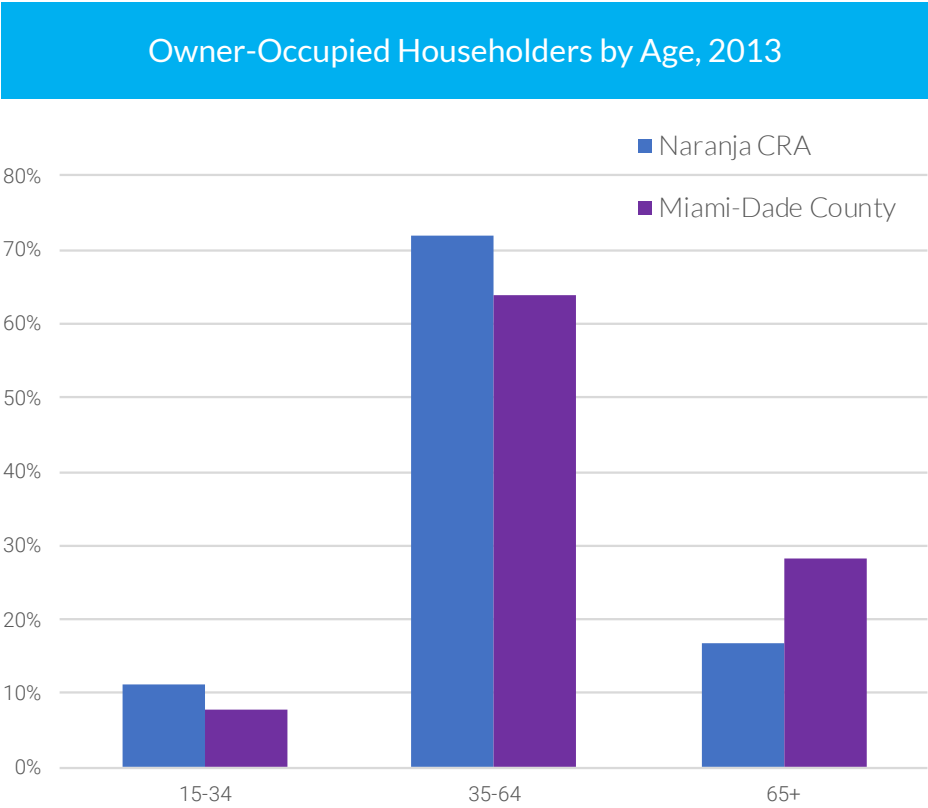


Source: 2009-2013, 2013-2017 American Community Survey 5-Year Estimates

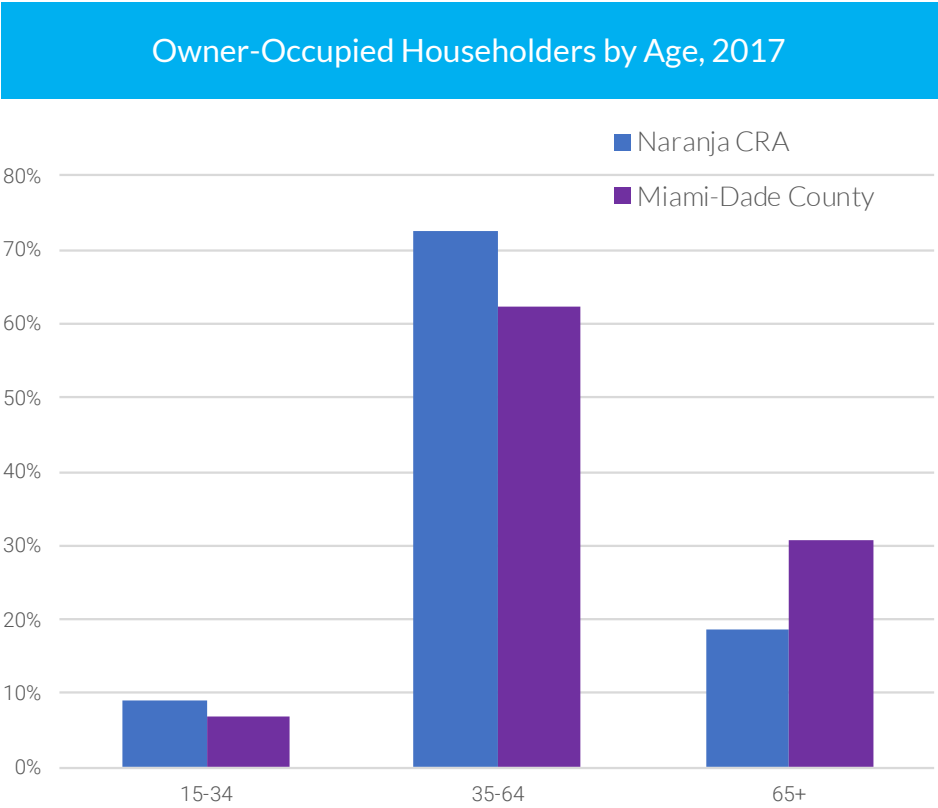


Source: 2009-2013, 2013-2017 American Community Survey 5-Year Estimates





Source: 2009-2013, 2013-2017 American Community Survey 5-Year Estimates



Source: 2009-2013, 2013-2017 American Community Survey 5-Year Estimates

Length of Residence: A New Community

“Residents vote with their feet,” meaning that the length of residence of households in a community is an important indicator of community health. Miami-Dade County has one of the highest resident turnover rates in the US — large numbers of families tend to move into metro Miami, and then leave after a short period. Census data indicates the following:

- Naranja is one of the County’s newest communities, following the large growth in its housing supply built from 2000 onward. Over 73 percent of all households moved into Naranja since 2000, compared to 64 percent for the County; and
- The data also indicates relative stability — despite Naranja’s more recent growth, 65 percent of all home owners moved into Naranja between 1990 and 2009, compared to 69 percent for the entire County.

| Percent Households by Year Moved Into CRA | | | | | | |
|---|---------------|-----------|----------|---------------|-----------|----------|
| | Owners | | | Renters | | |
| | 2015 or Later | 2000-2014 | Pre 2000 | 2015 or Later | 2000-2014 | Pre 2000 |
| Miami-Dade County | 4% | 54% | 42% | 18% | 76% | 27% |
| Naranja Lakes CRA Total | 5% | 64% | 31% | 17% | 80% | 3% |
| 105.00 - 2 | 0% | 42% | 58% | 0% | 100% | 0% |
| 105.00 - 3 | 0% | 26% | 74% | - | - | - |
| 107.03 - 2 | 1% | 82% | 17% | 8% | 92% | 32% |
| 107.03 - 3 | 7% | 42% | 51% | 33% | 67% | 55% |
| 107.03 - 4 | 5% | 72% | 23% | 3% | 97% | 20% |
| 108.01 - 1 | 10% | 62% | 28% | 7% | 91% | 14% |
| 108.01 - 2 | 1% | 70% | 29% | 25% | 75% | 8% |
| 108.02 - 1 | 6% | 49% | 45% | 39% | 61% | 24% |
| 108.02 - 2 | 11% | 89% | 0% | 16% | 84% | 16% |
| 108.02 - 3 | 8% | 71% | 22% | 30% | 63% | 13% |
| 109.00 - 1 | 0% | 54% | 46% | 0% | 90% | 10% |
| 109.00 - 2 | 4% | 63% | 32% | 23% | 73% | 16% |
| 109.00 - 3 | 0% | 100% | 0% | 22% | 71% | 18% |
| 110.05 - 1 | 15% | 43% | 42% | 0% | 74% | 78% |
| 110.05 - 3 | 0% | 73% | 27% | 59% | 41% | 6% |

Source: 2009-2013, 2013-2017 American Community Survey 5-Year Estimates

Industry Structure

Employment and Employment Growth

With 626 Business establishments employing 3,539 workers, the CRA is a relatively small employment market relative to its total population (37,601 persons). The CRA Market Area, however, represents a significant segment of the Count’s employment base. With 6,354 business establishments employing 70,346 workers, **the Market Area represents 12% of the County’s population, and 6% of the County’s jobs base.**

Employment growth in the CRA has been explosive. **The number of jobs within the CRA more than doubled from 2010 to 2018 (105 percent), compared to 15 percent and 20 percent for the Market Area and Miami-Dade County, ranking the CRA as one of the fastest growing employment areas in South Florida.**

A Community of Small Business

The South Florida economy is noted for its especially high proportion of small businesses. The CRA is no exception, with an unusually high percentage of small businesses. **Businesses with payroll employing less than 20 employees represent 96 percent of all business establishments in the CRA, and 94 percent across the CRA Market Area. Establishments employing less than 20 account for 60 percent of total employment in the CRA, and 86 percent of total sales. Establishments employing less than 20 account for 20 percent of total Market Area employment and 50 percent of Market area Sales.**

94 and 91 percent of all establishments are single location business in the CRA and Market Area, and the vast majority (80 percent) earn less than \$1Million per year).

| Business Characteristics, Naranja Lakes CRA | | | | |
|---|-------------|-------|-----------------|-----|
| Q4 2018 | | | | |
| Private Employers Excluding Government | Naranja CRA | | CRA Market Area | |
| Total Establishments | 626 | | 6,354 | |
| Total Employer Establishments | 609 | | 6,023 | |
| Total Non-Employer Establishments | 17 | | 331 | |
| Total Employees | 3,539 | | 70,346 | |
| Total Local Sales | \$483M | | \$3.9B | |
| Total Sales | \$483M | | 18.9B | |
| Sales Per Worker | \$136,674 | | \$269,153 | |
| Establishments by Employment | | | | |
| 20 Employees or Less | 599 | 96% | 5,993 | 94% |
| 21-99 Employees | 25 | 4% | 285 | 4% |
| 100 or more | 2 | 0.3% | 63 | 1% |
| Local and National Presence | | | | |
| Single Location | 590 | 94.2% | 5,785 | 91% |
| Branch | 36 | 5.8% | 569 | 9% |
| Subsidiary Headquarters | 0 | 0.0% | 0 | 0% |
| Headquarters | 0 | 0.0% | 0 | 0% |
| Establishments by Sales Revenue | | | | |
| <1M sales | 506 | 80.8% | 5,030 | 79% |
| 1-5M | 106 | 16.9% | 1,049 | 17% |
| 5-10M | 10 | 1.6% | 154 | 2% |
| 10-50M | 4 | 0.6% | 105 | 2% |
| 50-100M | - | 0.0% | 7 | 0% |
| 100-500M | - | 0.0% | 9 | 0% |
| >500M | - | 0.0% | - | 0% |
| Government Employment | 29 | | 2,356 | |

Business Productivity

The CRA’s private employers generated over \$483M in total sales in 2018, while the Market Area accounts for over \$18.9 B in annual sales, or 7 percent of total sales in the County.

On a productivity basis, the CRA lags the rest of the County. Total sales per employee are near \$137,000 per worker, compared to over \$269,000 and \$226,000 per worker for the Market area and the County.

Non-Employer Establishments

The CRA’s high percentage of small business establishments is probably even higher than the statistics indicate. The exact count of **Non-Employer Establishments**, or businesses owned and run by a single proprietor with no employees, is unavailable at the CRA and Market Area levels of geography. However, in 2016 (the latest available year), Miami-Dade County had 83,903 employer establishments and 469,992 non-employer businesses, representing 85 percent of all establishments, and 48 percent of all employment.

From 2012 to 2016 Non-employer establishments in Miami-Dade County accounted for the majority of all business establishment growth, outperforming the number of employer establishments in the County. This means that if the CRA and Market area has the same composition of non-employer establishments as the County, it is home to a significant number of additional businesses that are uncouncted.

High Rate of Self-Employment

At 12 percent of all employed resident workers, the CRA’s rate of self-employment is 20 percent higher than the US average (10 percent of all workers), compared to 14 percent for Miami-Dade County.

Industry Composition & Economic Base

Industry sectors are classified as **local** or **traded**. Local industries serve the needs of residents and local businesses. **Traded industries, sometimes called basic industries, or economic base, are the engines of local economies because they serve markets beyond the region and grow the local economy by bringing in dollars from outside it. Without strong traded industries it is virtually impossible for an economy to grow and attain high performance.** Traded industries in the CRA represent only 18 percent of total private industry employment compared to 24 percent for the Market Area, and 36 percent for the US.

A second, important measure of whether an industry has local competitive advantages that help it outperform competitors in other regions, is its **Location Quotient (LQ)**. An industry

Location Quotient is the ratio of the percentage of local employment in an industry compared to the percentage of employment for that industry nationwide. ***A Location Quotient of 1 or more means that the local industry is employing a greater concentration of workers than the nation as a whole for that industry. An industry LQ of 1.25 indicates an industry has significant local competitive advantages that supports superior performance relative to competitors in that industry across the rest of the US.***

Leading Sectors and Employers

The CRA has a large percentage of service industry employment, with lower occupational wages and skills. The CRA’s industry structure is built on servicing the Market Area’s leading industry sectors, providing expert consulting services, financing, and logistics support for the Market area’s leading businesses. Its leading **traded** industry sectors, based on employment share and high Location Quotients are:

- Professional, Scientific, and Technical Services;
- Educational Services;
- Transit and Ground Passenger Transportation;
- Truck Transportation;
- Telecommunications;
- Credit Intermediation and Related Activities; and
- Merchant Wholesalers, Durable Goods

Nine **local** industry sectors, based on employment size and location quotient, represent over 57 percent of the CRA’s total employment. They are:

- Educational Services
- Food Services and Drinking Places
- Social Assistance
- Food and Beverage Stores
- Ambulatory Health Care Services
- Repair and Maintenance
- Religious, Grantmaking, Civic, Professional, and Similar Organizations
- Real Estate

- Administrative and Support Services

By contrast, the industry structure of the Market Area is dominated by seven industries, each with **significant local competitive advantages**. They are:

- Crop Production
- Merchant Wholesalers, Nondurable Goods
- Professional, Scientific, and Technical Services
- Water Transportation
- Utilities
- Support Activities for Agriculture and Forestry
- Transportation Equipment Manufacturing

Total employment in these sectors accounts for 83 percent of the Market Area’s traded sector employment. ***Crop Production and Support Activities for Agriculture alone have location quotients of 16.4 and 4.53. Water transportation, which includes boat building and repair, is the single most competitive industry in the Market Area, with an LQ over 37. The Market Area’s employment in Utilities is also of note, as it is extremely competitive, and generates over \$1.2Billion in sales annually alone.***

Local sectors of note, due to their size and relative competitiveness include:

- Administrative and Support Services;
- Hospitals; and
- Specialty Trade Contractors

Largest Employers

The Largest employers operating in traded industry sectors in the CRA are:

- Zuni Transportation Inc (485999- All Other Transit And Ground Passenger Transportation);
- Marlin Engineering Inc (541330-Engineering Services);
- Concrete Supplier Inc (541618-Other Management Consulting Services);
- Duenas Mobile Application (541511-Custom Computer Programming Services);
- Migrant Education Program (611691-Exam Preparation And Tutoring); and
- Excel Kids Academy Of Homestead (611710-Educational Support Services)

The Largest employers operating in traded industry sectors outside the CRA, but in the CRA Market Area are:

- Community Health Of South Fl, (Freestanding Ambulatory Surgical & Emergency Centers);
- Costa Farms, (Flower, Nursery Stock/Florists & Merchant Wholesalers);
- Dimare Homestead Inc, (Fresh Fruit & Vegetable Merchant Wholesalers);
- Coca-Cola Beverages Florida, (Soft Drink Manufacturing);
- Gulfstream Tomato Growers Inc, (Fresh Fruit & Vegetable Merchant Wholesalers);
- Marriott International Inc, (Hotels Except Casino Hotels & Motels); and
- Zoo Miami, (Zoos & Botanical Gardens)

Major Future Development Projects

Larkin Community Hospitals, headquartered in South Miami, plans to develop the Larkin Health Sciences Institute, a \$68 million, 48-acre campus in Naranja Lakes. The Institute has been planned to house Larkin’s schools of nursing, College of pharmacy, College of Biomedical Sciences, and College of Health Sciences. Space for a medical-oriented middle school and high school has also been planned.

The Institute is aimed at growing the region’s supply of nurses and medical practitioners to meet growing demand, as well as increase the percentage of Hispanic and African-American

doctors practicing in the field. By creating a campus that caters to a wide range of students, the Institute hopes to encourage health professionals to stay in the South Florida area.

Atlantic Sapphire, a Norwegian-based fish-farming company, is completing construction on a 380,000 square foot indoor Salmon farm at 272nd Street and 217th Avenue. The \$130 Million facility, when complete, promises to supply 10 percent of all Salmon in the North American Market and employ up to 100 workers.

| Naranja Lakes CRA | | | | |
|--|-----------|------------------|---------------|--------------------|
| Leading Industry Sectors Q4 2018 | Employees | Percent of Total | Total Sales | Sales Per Employee |
| Traded Sectors | | | | |
| 541 Professional, Scientific, and Technical Services | 153 | 4.32% | \$21,846,000 | \$142,784 |
| 611 Educational Services | 74 | 2.09% | \$0 | \$0 |
| 485 Transit and Ground Passenger Transportation | 60 | 1.70% | \$3,916,000 | \$65,267 |
| 484 Truck Transportation | 55 | 1.55% | \$12,136,000 | \$220,655 |
| 517 Telecommunications | 33 | 0.93% | \$25,947,000 | \$786,273 |
| 522 Credit Intermediation and Related Activities | 26 | 0.73% | \$16,057,000 | \$617,577 |
| 423 Merchant Wholesalers, Durable Goods | 22 | 0.62% | \$25,465,000 | \$1,157,500 |
| 712 Museums, Historical Sites, and Similar Institutions | 15 | 0.42% | \$790,000 | \$52,667 |
| 111 Crop Production | 14 | 0.40% | \$1,350,000 | \$96,429 |
| 424 Merchant Wholesalers, Nondurable Goods | 14 | 0.40% | \$17,275,000 | \$1,233,929 |
| 488 Support Activities for Transportation | 14 | 0.40% | \$2,063,000 | \$147,357 |
| 512 Motion Picture and Sound Recording Industries | 13 | 0.37% | \$2,233,000 | \$171,769 |
| 711 Performing Arts, Spectator Sports, and Related Industries | 13 | 0.37% | \$1,152,000 | \$88,615 |
| 523 Securities, Commodity Contracts, and Other Financial Investments and | 12 | 0.34% | \$5,444,000 | \$453,667 |
| 721 Accommodation | 12 | 0.34% | \$1,302,000 | \$108,500 |
| 334 Computer and Electronic Product Manufacturing | 11 | 0.31% | \$2,373,000 | \$215,727 |
| 425 Wholesale Electronic Markets and Agents and Brokers | 11 | 0.31% | \$28,550,000 | \$2,595,455 |
| 519 Other Information Services | 11 | 0.31% | \$0 | \$0 |
| 561 Administrative and Support Services | 8 | 0.23% | \$823,000 | \$102,875 |
| 339 Miscellaneous Manufacturing | 7 | 0.20% | \$987,000 | \$141,000 |
| 237 Heavy and Civil Engineering Construction | 6 | 0.17% | \$692,000 | \$115,333 |
| 332 Fabricated Metal Product Manufacturing | 6 | 0.17% | \$576,000 | \$96,000 |
| 562 Waste Management and Remediation Services | 6 | 0.17% | \$1,021,000 | \$170,167 |
| 211 Oil and Gas Extraction | 6 | 0.17% | \$2,898,000 | \$483,000 |
| 713 Amusement, Gambling, and Recreation Industries | 5 | 0.14% | \$789,000 | \$157,800 |
| 511 Publishing Industries (except Internet) | 5 | 0.14% | \$1,109,000 | \$221,800 |
| 518 Data Processing, Hosting, and Related Services | 4 | 0.11% | \$650,000 | \$162,500 |
| 336 Transportation Equipment Manufacturing | 4 | 0.11% | \$438,000 | \$109,500 |
| 221 Utilities | 3 | 0.08% | \$690,000 | \$230,000 |
| 337 Furniture and Related Product Manufacturing | 2 | 0.06% | \$542,000 | \$271,000 |
| | 625 | 18% | \$179,114,000 | \$286,582 |

| Naranja Lakes CRA | | | | |
|--|-----------|------------------|---------------|--------------------|
| Leading Industry Sectors Q4 2018 | Employees | Percent of Total | Total Sales | Sales Per Employee |
| Local Sectors | | | | |
| 611 Educational Services | 733 | 20.71% | \$461,000 | \$629 |
| 722 Food Services and Drinking Places | 272 | 7.69% | \$14,508,000 | \$53,338 |
| 624 Social Assistance | 256 | 7.23% | \$11,437,000 | \$44,676 |
| 445 Food and Beverage Stores | 218 | 6.16% | \$43,070,000 | \$197,569 |
| 621 Ambulatory Health Care Services | 153 | 4.32% | \$25,148,000 | \$164,366 |
| 811 Repair and Maintenance | 147 | 4.15% | \$11,871,000 | \$80,755 |
| 813 Religious, Grantmaking, Civic, Professional, and Similar Organizations | 133 | 3.76% | \$396,000 | \$2,977 |
| 531 Real Estate | 122 | 3.45% | \$16,997,000 | \$139,320 |
| 561 Administrative and Support Services | 104 | 2.94% | \$7,918,000 | \$76,135 |
| 441 Motor Vehicle and Parts Dealers | 95 | 2.68% | \$32,532,000 | \$342,442 |
| 238 Specialty Trade Contractors | 94 | 2.66% | \$10,369,000 | \$110,309 |
| 812 Personal and Laundry Services | 91 | 2.57% | \$3,589,000 | \$39,440 |
| 541 Professional, Scientific, and Technical Services | 65 | 1.84% | \$6,873,000 | \$105,738 |
| 623 Nursing and Residential Care Facilities | 61 | 1.72% | \$499,000 | \$8,180 |
| 452 General Merchandise Stores | 39 | 1.10% | \$7,362,000 | \$188,769 |
| 447 Gasoline Stations | 37 | 1.05% | \$39,035,000 | \$1,055,000 |
| 236 Construction of Buildings | 37 | 1.05% | \$13,522,000 | \$365,459 |
| 453 Miscellaneous Store Retailers | 30 | 0.85% | \$5,710,000 | \$190,333 |
| 444 Building Material and Garden Equipment and Supplies Dealers | 24 | 0.68% | \$6,621,000 | \$275,875 |
| 446 Health and Personal Care Stores | 22 | 0.62% | \$4,553,000 | \$206,955 |
| 524 Insurance Carriers and Related Activities | 20 | 0.57% | \$3,309,000 | \$165,450 |
| 713 Amusement, Gambling, and Recreation Industries | 20 | 0.57% | \$1,552,000 | \$77,600 |
| 532 Rental and Leasing Services | 19 | 0.54% | \$6,245,000 | \$328,684 |
| 515 Broadcasting (except Internet) | 14 | 0.40% | \$2,688,000 | \$192,000 |
| 423 Merchant Wholesalers, Durable Goods | 14 | 0.40% | \$13,669,000 | \$976,357 |
| 999 Unclassified | 14 | 0.40% | \$0 | \$0 |
| 443 Electronics and Appliance Stores | 13 | 0.37% | \$3,223,000 | \$247,923 |
| 442 Furniture and Home Furnishings Stores | 11 | 0.31% | \$2,796,000 | \$254,182 |
| 448 Clothing and Clothing Accessories Stores | 11 | 0.31% | \$2,051,000 | \$186,455 |
| 622 Hospitals | 8 | 0.23% | \$958,000 | \$119,750 |
| 522 Credit Intermediation and Related Activities | 8 | 0.23% | \$1,905,000 | \$238,125 |
| 928 National Security and International Affairs | 8 | 0.23% | \$0 | \$0 |
| 332 Fabricated Metal Product Manufacturing | 6 | 0.17% | \$607,000 | \$101,167 |
| 311 Food Manufacturing | 4 | 0.11% | \$132,000 | \$33,000 |
| 517 Telecommunications | 4 | 0.11% | \$1,617,000 | \$404,250 |
| 237 Heavy and Civil Engineering Construction | 4 | 0.11% | \$1,001,000 | \$250,250 |
| 339 Miscellaneous Manufacturing | 3 | 0.08% | \$351,000 | \$117,000 |
| | 2,914 | 82% | \$304,575,000 | \$104,521 |

| Naranja CRA Market Area | | | | | | | | |
|--|-----------|------------------|------------------------------|--------------------------|-----------------|--------------------|-----------------------------|--------------------------------------|
| Leading Industry Sectors Q4 2018 | Employees | Percent of Total | Employment Location Quotient | Average Earnings Per Job | Total Sales | Sales Per Employee | Employment Growth 2011-2018 | Forecasted Employment Growth to 2024 |
| Traded Sectors | | | | | | | | |
| 111 Crop Production | 6,037 | 8.58% | 16.42 | \$37,704 | \$1,119,545,271 | \$185,433 | 5% | 3% |
| 424 Merchant Wholesalers, Nondurable Goods | 2,119 | 3.01% | 2.35 | \$58,434 | \$515,872,408 | \$243,467 | -4% | 5% |
| 541 Professional, Scientific, and Technical Services | 2,005 | 2.85% | 0.54 | \$63,051 | \$369,007,071 | \$184,056 | -7% | 37% |
| 483 Water Transportation | 1,112 | 1.58% | 37.30 | \$122,432 | \$792,138,282 | \$712,095 | 2% | -18% |
| 221 Utilities | 1,014 | 1.44% | 5.13 | \$174,805 | \$1,229,860,781 | \$1,213,092 | -36% | 19% |
| 115 Support Activities for Agriculture and Forestry | 843 | 1.20% | 4.53 | \$28,916 | \$40,115,225 | \$47,583 | 18% | 2% |
| 336 Transportation Equipment Manufacturing | 733 | 1.04% | 0.98 | \$51,007 | \$184,672,229 | \$251,838 | 39% | 8% |
| 721 Accommodation | 396 | 0.56% | 0.45 | \$41,431 | \$66,967,575 | \$169,233 | 9% | 8% |
| 425 Wholesale Electronic Markets and Agents and Brokers | 347 | 0.49% | 1.05 | \$74,141 | \$55,985,839 | \$161,453 | -33% | -21% |
| 423 Merchant Wholesalers, Durable Goods | 302 | 0.43% | 0.34 | \$71,152 | \$97,894,418 | \$324,586 | -30% | 58% |
| 561 Administrative and Support Services | 213 | 0.30% | 1.03 | \$28,634 | \$55,007,583 | \$257,744 | -95% | 2022% |
| 488 Support Activities for Transportation | 194 | 0.28% | 0.79 | \$49,665 | \$36,401,464 | \$187,519 | -16% | 46% |
| 484 Truck Transportation | 185 | 0.26% | 0.58 | \$44,375 | \$55,849,373 | \$302,047 | -45% | 158% |
| 112 Animal Production and Aquaculture | 120 | 0.17% | 0.61 | \$49,135 | \$31,162,716 | \$259,831 | -5% | -16% |
| 713 Amusement, Gambling, and Recreation Industries | 114 | 0.16% | 0.36 | \$39,657 | \$12,894,336 | \$113,305 | -55% | 157% |
| 485 Transit and Ground Passenger Transportation | 111 | 0.16% | 0.53 | \$28,767 | \$12,168,520 | \$109,585 | 20% | 65% |
| 711 Performing Arts, Spectator Sports, and Related Industries | 83 | 0.12% | 0.26 | \$32,229 | \$10,589,108 | \$127,346 | -64% | 7% |
| 333 Machinery Manufacturing | 82 | 0.12% | 0.19 | \$57,904 | \$27,196,424 | \$330,871 | 67% | 21% |
| 212 Mining (except Oil and Gas) | 82 | 0.12% | 1.00 | \$40,852 | \$53,364,783 | \$653,066 | 29% | 35% |
| 522 Credit Intermediation and Related Activities | 75 | 0.11% | 0.39 | \$101,675 | \$44,004,952 | \$585,047 | -84% | 526% |
| 325 Chemical Manufacturing | 70 | 0.10% | 0.19 | \$90,412 | \$68,149,784 | \$971,553 | 67% | 20% |
| 237 Heavy and Civil Engineering Construction | 68 | 0.10% | 1.07 | \$64,123 | \$20,183,951 | \$298,783 | -77% | 828% |
| 454 Nonstore Retailers | 65 | 0.09% | 0.46 | \$37,171 | \$12,672,785 | \$195,923 | -49% | 160% |
| 712 Museums, Historical Sites, and Similar Institutions | 64 | 0.09% | 0.83 | \$43,183 | \$7,343,777 | \$114,266 | 31% | 20% |
| 524 Insurance Carriers and Related Activities | 58 | 0.08% | 0.25 | \$78,321 | \$30,315,504 | \$519,419 | -73% | 419% |
| 327 Nonmetallic Mineral Product Manufacturing | 51 | 0.07% | 1.16 | \$64,318 | \$14,511,683 | \$283,059 | -64% | 384% |
| 611 Educational Services | 41 | 0.06% | 0.80 | \$46,485 | \$8,729,095 | \$211,790 | -95% | 3193% |
| 321 Wood Product Manufacturing | 40 | 0.06% | 0.24 | \$40,559 | \$10,255,977 | \$256,190 | 8% | 6% |
| 517 Telecommunications | 35 | 0.05% | 0.63 | \$105,839 | \$107,953,398 | \$3,108,024 | -85% | 421% |
| 523 Securities, Commodity Contracts, and Other Financial Investments and | 34 | 0.05% | 0.10 | \$284,539 | \$31,466,805 | \$929,881 | -15% | 51% |
| | 16,693 | 24% | | | \$5,122,281,116 | \$306,844 | -29% | 55% |
| Local Sectors | | | | | | | | |
| 722 Food Services and Drinking Places | 5,141 | 7.31% | 0.95 | \$26,766 | \$434,880,977 | \$84,589 | 19% | 9% |
| 561 Administrative and Support Services | 4,240 | 6.03% | 1.03 | \$28,634 | \$268,248,452 | \$63,270 | -2% | 7% |
| 452 General Merchandise Stores | 2,825 | 4.02% | 2.00 | \$31,156 | \$233,617,180 | \$82,693 | 13% | 9% |
| 624 Social Assistance | 2,745 | 3.90% | 1.45 | \$26,890 | \$130,497,654 | \$47,538 | 9% | 4% |
| 622 Hospitals | 2,717 | 3.86% | 1.19 | \$80,492 | \$500,625,429 | \$184,270 | 10% | 8% |
| 238 Specialty Trade Contractors | 2,496 | 3.55% | 1.27 | \$39,776 | \$306,150,630 | \$122,660 | 6% | 45% |
| 445 Food and Beverage Stores | 2,490 | 3.54% | 1.77 | \$29,175 | \$188,981,141 | \$75,895 | 10% | 2% |
| 621 Ambulatory Health Care Services | 2,384 | 3.39% | 0.68 | \$64,983 | \$324,132,981 | \$135,980 | 19% | 17% |
| 623 Nursing and Residential Care Facilities | 1,390 | 1.98% | 0.92 | \$39,690 | \$113,841,790 | \$81,901 | -3% | 0% |
| 611 Educational Services | 1,076 | 1.53% | 0.80 | \$46,485 | \$64,415,019 | \$59,873 | 28% | 26% |
| 236 Construction of Buildings | 1,041 | 1.48% | 1.13 | \$49,163 | \$159,331,511 | \$152,983 | 51% | 16% |
| 441 Motor Vehicle and Parts Dealers | 983 | 1.40% | 1.05 | \$58,912 | \$164,822,300 | \$167,694 | 13% | 6% |
| 448 Clothing and Clothing Accessories Stores | 965 | 1.37% | 1.49 | \$29,923 | \$113,971,122 | \$118,090 | -5% | -4% |
| 812 Personal and Laundry Services | 849 | 1.21% | 0.86 | \$24,894 | \$114,418,239 | \$134,838 | 19% | 9% |
| 446 Health and Personal Care Stores | 740 | 1.05% | 1.50 | \$42,664 | \$70,910,615 | \$95,815 | 5% | 4% |
| 453 Miscellaneous Store Retailers | 501 | 0.71% | 1.16 | \$35,326 | \$54,638,490 | \$109,027 | 0% | 2% |
| 541 Professional, Scientific, and Technical Services | 479 | 0.68% | 0.54 | \$63,051 | \$74,419,181 | \$155,375 | -78% | 474% |
| 811 Repair and Maintenance | 470 | 0.67% | 0.69 | \$35,019 | \$58,048,881 | \$123,491 | -11% | 8% |
| 447 Gasoline Stations | 454 | 0.64% | 1.06 | \$28,818 | \$61,878,766 | \$136,384 | 12% | 2% |
| 492 Couriers and Messengers | 453 | 0.64% | 1.37 | \$61,818 | \$66,633,415 | \$147,050 | 30% | 12% |
| 813 Religious, Grantmaking, Civic, Professional, and Similar Organizations | 437 | 0.62% | 0.69 | \$47,616 | \$80,158,624 | \$183,561 | 26% | 12% |
| 237 Heavy and Civil Engineering Construction | 423 | 0.60% | 1.07 | \$64,123 | \$74,344,976 | \$175,783 | 42% | 48% |
| 522 Credit Intermediation and Related Activities | 388 | 0.55% | 0.39 | \$101,675 | \$147,085,804 | \$379,501 | -17% | 21% |
| 443 Electronics and Appliance Stores | 329 | 0.47% | 1.41 | \$60,450 | \$52,842,732 | \$160,742 | 0% | -1% |
| 221 Utilities | 274 | 0.39% | 5.13 | \$174,805 | \$279,683,798 | \$1,021,533 | -83% | 342% |
| 484 Truck Transportation | 249 | 0.35% | 0.58 | \$44,375 | \$53,490,448 | \$215,196 | -26% | 92% |
| 444 Building Material and Garden Equipment and Supplies Dealers | 226 | 0.32% | 1.07 | \$34,417 | \$26,282,731 | \$116,460 | -52% | 220% |
| 524 Insurance Carriers and Related Activities | 215 | 0.31% | 0.25 | \$78,321 | \$84,280,073 | \$391,255 | 1% | 40% |
| 451 Sporting Goods, Hobby, Musical Instrument, and Book Stores | 200 | 0.28% | 0.70 | \$25,229 | \$11,980,782 | \$59,815 | 15% | 9% |
| 517 Telecommunications | 183 | 0.26% | 0.63 | \$105,839 | \$135,937,343 | \$741,908 | -21% | -1% |
| | 37,361 | 53% | | | \$4,450,551,087 | \$119,121 | 0% | 21% |

Advanced Industry Composition

Another measure of local competitiveness is its **Advanced Industry Composition**. Developed by the Brookings Institution, the U.S. **Advanced Industries Sector** is 50 industries that drive the nation’s best performing regional economies. As a whole:

- The Advanced Industries Sector has the highest levels of research and development spending, productivity well above the rest of the economy, employ 80 percent of the nations’ engineers, funds 90 percent of private sector R&D, and accounts for 85 percent of all U.S. patents and 60 percent of U.S. exports;
- Advanced industry output expanded 30 percent faster than the rest of the US economy, and has added over one million jobs since 2010. Employment growth and economic output of the Sector has been 1.9 times higher than the national average since 2010.
- The Sector provides high-skilled, high-wage and high value-added employment. Workers in advanced industries generate over \$210,000 in annual value added per worker compared with \$101,000 for workers outside the Sector. Workers within the Sector, unlike the remainder of the U.S. economy, are experiencing rapidly rising wages. The average advanced industries worker earns \$90,000 in total compensation, twice as much as workers outside of the sector. Absolute earnings in advanced industries grew by 63 percent from 1975, compared with a 17 percent increase outside the sector.

Total US employment in the Advanced Industries Sector represents 8.7 percent of total employment, but over 17 percent of total US Output. The sector as a whole are crucial foundations of extensive supply chains and third-party employment in a wide range of support industries outside the sector. As such, the composition of Advanced Industry sectors is a good measure of the technical capacity, sophistication, and growth potential of a local economy.

The CRA Market Area is home to 300 establishments within the Advanced Industries Sector, employing 3,259 workers, or 5 percent of the Market Area’s employment base, generating \$1.96B in sales. ***Given that Advanced Industries employment represents only 3 percent of the state’s total employment, the CRA has the potential to grow Advanced Industry employment particularly Advanced Industry Services.***

| Advanced Industry Sector - Naranja CRA Market Area | | | |
|--|----------------|-----------|------------------|
| Services | Establishments | Employees | Sales |
| 5413 Architecture & Engineering | 42 | 181 | \$31,283,129 |
| 5416 Management Consulting | 123 | 784 | \$122,533,499 |
| 5415 Computer Systems Design | 22 | 115 | \$24,201,503 |
| 5179 Other Telecommunications | 18 | 17 | \$10,445,139 |
| 5182 Data Processing & Hosting | 7 | - | \$3,883,771 |
| 5112 Software Products | 2 | - | - |
| 5172 Wireless Telecom Carriers | - | - | - |
| 5191 Web Search and Internet Publishing | 4 | - | \$2,551,619 |
| 5417 R&D Services | 24 | 44 | \$7,517,676 |
| 2122 Metal Ore Mining | - | - | - |
| 5174 Satellite Telecommunications | - | - | - |
| 6215 Medical & Diagnostic Laboratories | 7 | 45 | \$7,863,064 |
| 5152 Cable & Other Programming | - | - | - |
| Services Totals | 249 | 1,186 | \$210,279,400 |
| Manufacturing | Establishments | Employees | Sales |
| 3344 Semiconductors | - | - | - |
| 3345 Precision Instruments | 5 | - | - |
| 3341 Computer Equipment | - | - | - |
| 3339 General Purpose Machinery | 1 | 33 | \$10,068,779 |
| 3391 Medical Equipment & Supplies | 2 | - | - |
| 3399 Jewelry, Sporting Goods | 23 | - | - |
| 3364 Aircraft Products & Parts | - | - | \$754,059 |
| 3253 Pesticides & Fertilizers | - | 70 | \$68,149,784 |
| 3346 Magnetic & Optical Media | - | - | - |
| 3279 Stone & Mineral Products | 1 | 39 | \$5,721,204 |
| 3333 Commercial & Service Machinery | - | - | - |
| 3336 Engine & Power Equipment | - | - | - |
| 3366 Ships & Boats | 4 | 685 | \$168,571,500 |
| 3365 Railroad Rolling Stock | - | - | - |
| 3311 Iron & Steel Products | - | - | - |
| 3315 Foundries | - | - | - |
| 3351 Electrical Lighting Equipment | - | - | - |
| 3313 Aluminum Products | - | - | - |
| 3271 Clay & Refractory Products | - | - | - |
| 3342 Communications Equipment | - | - | - |
| 3241 Petroleum & Coal Products | 1 | - | - |
| 3331 Agri., Constr., Mining Machinery | 1 | - | \$3,050,385 |
| 3251 Basic Chemicals | 1 | - | - |
| 3343 Audio & Video Equipment | - | - | - |
| 3353 Electrical Equipment | 2 | - | - |
| 3363 Motor Vehicle Parts | 1 | - | \$1,852,479 |
| 3361 Motor Vehicles | - | - | - |
| 3259 Misc. Chemicals | 1 | - | - |
| 3369 Misc. Transportation Equipment | - | - | - |
| 3362 Motor Vehicle Body & Trailers | - | 56 | \$13,494,191 |
| 3254 Pharmaceuticals | - | - | - |
| 3359 Misc. Electrical Equipment | - | - | - |
| 3352 Household Appliances | - | - | - |
| 3332 Industrial Machinery | - | - | - |
| 3252 Resins & Synthetic Rubbers | - | - | - |
| Manufacturing Totals | 43 | 883 | \$271,662,381 |
| Energy | Establishments | Employees | Sales |
| 2111 Oil & Gas Extraction | 3 | - | - |
| 2211 Power Generation & Supply | 5 | 1,189 | \$1,481,061,861 |
| | 8 | 1,189 | \$1,481,061,861 |
| Advanced Industry totals | 300 | 3,259 | \$1,963,003,641 |
| Market Area Total | 6,354 | 70,346 | \$18,933,819,857 |
| Advanced Industry Percentage of Total | 5% | 5% | 10% |

Naranja Lakes and the Importance of Agriculture

The importance of agriculture to the Naranja Lakes area cannot be overstated. Agriculture and agricultural services, inputs, financing, machinery, and transportation and distribution anchors the south Miami-Dade economy. The skills and embedded knowledge of its business owners and workers can’t be bought or replaced.

Agricultural employment in the Naranja Lakes Market Area represents 81 percent of all agricultural employment in Miami-Dade County, and Market Area total agricultural sales, at over \$1 Billion, is 20 percent of total private business sales in the entire Market Area.

Significantly, the industry and employment structure of Agriculture has changed across the Market Area and the County. Since 2000, the area’s Agriculture sector has shifted from Vegetable, fruit and nut farming to Greenhouse and nursery production of tropical flowers, trees, and shrubbery. While the rest of the County’s Agriculture sectors have receded, Greenhouse and Nursery production employment and sales grew over 32 percent from 2000 to 2017.

The addition of the ***Atlantic Sapphire*** indoor salmon farm represents the latest phase of growth, and extension of the area’s trend to specialized and indoor growing. The new business also represents the future of farming, producing organically-certified award winning fish completely indoors.

The shifting skill sets, knowledge base, and technology embedded in this shift may have important implications for the future of Agriculture in the County, especially in light of threats from Climate change and Sea level rise. Additionally, the loss of productive farmland to residential and commercial development must be carefully considered as part of the region’s future.

Miami-Dade County: Agricultural Sector Performance

| | 2000 | 2011 | 2017 | 2000-2017 |
|---|-------|-------|-------|-----------|
| Employment | | | | |
| NAICS 11 Agriculture, forestry, fishing and hunting | 8,471 | 8,024 | 8,243 | -3% |
| NAICS 111 Crop production | 6,279 | 6,317 | 6,728 | 7% |
| NAICS 1112 Vegetable and melon farming | 1,521 | 946 | 582 | -62% |
| NAICS 1113 Fruit and tree nut farming | 251 | 371 | 239 | -5% |
| NAICS 1114 Greenhouse and nursery production | 4,302 | 4,851 | 5,700 | 32% |
| Establishments | | | | |
| NAICS 11 Agriculture, forestry, fishing and hunting | 415 | 437 | 423 | 2% |
| NAICS 111 Crop production | 297 | 326 | 307 | 3% |
| NAICS 1112 Vegetable and melon farming | 72 | 52 | 34 | -53% |
| NAICS 1113 Fruit and tree nut farming | 31 | 25 | 28 | -10% |
| NAICS 1114 Greenhouse and nursery production | 184 | 231 | 223 | 21% |

Source: US Bureau of Labor Statistics, Quarterly Census of Employment & Wages, 2000-2018.

Labor Force

The composition, skills, and knowledge of the local labor force is crucial to sustained economic growth. Small economies can’t always rely on importing labor to fill local needs, and many employers, especially small businesses, can’t always afford to import workers from outside the region.

Labor Participation Rate

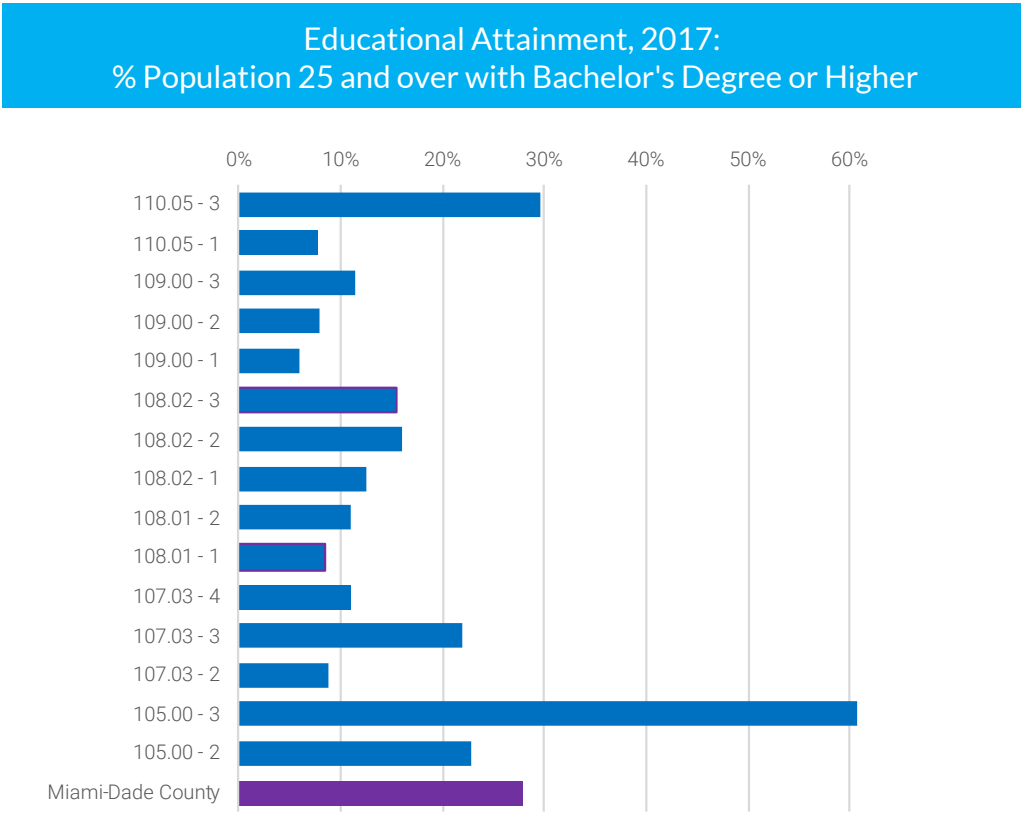
The CRA’s labor participation rate — the percentage of its working age population that is either employed or actively seeking employment — varies widely across the CRA, ranging from 52 to 86 percent. Dynamic, productive economies maintain and grow their labor participation rates. From 2013 to 2017, the overall participation rate has held steady at 63 percent, just above the average for the County.

| Labor Force Participation Rate | | | |
|--------------------------------|------------|------------|-----------|
| | 2013 | 2017 | 2013-2017 |
| Miami-Dade County | 63% | 62% | -1% |
| Naranja CRA | 61% | 63% | 1% |
| 105.00 - 2 | 58% | 68% | 10% |
| 105.00 - 3 | 32% | 86% | 54% |
| 107.03 - 2 | 68% | 58% | -10% |
| 107.03 - 3 | 59% | 63% | 5% |
| 107.03 - 4 | 62% | 66% | 3% |
| 108.01 - 1 | 59% | 60% | 0% |
| 108.01 - 2 | 65% | 66% | 1% |
| 108.02 - 1 | 33% | 61% | 28% |
| 108.02 - 2 | 74% | 76% | 2% |
| 108.02 - 3 | 56% | 57% | 1% |
| 109.00 - 1 | 61% | 53% | -7% |
| 109.00 - 2 | 57% | 67% | 10% |
| 109.00 - 3 | 64% | 56% | -8% |
| 110.05 - 1 | 60% | 71% | 10% |
| 110.05 - 3 | 82% | 52% | -30% |

Source: 2009-2013, 2013-2017 American Community Survey 5-Year Estimates

Educational Attainment

A highly educated resident workforce is also a hallmark of leading economies. With only 12 percent of its residents with a Bachelor’s degree or higher, the CRA significantly lags the County’s educational attainment, at 28 percent. Only two of the CRA’s 15 block groups exceed the County.

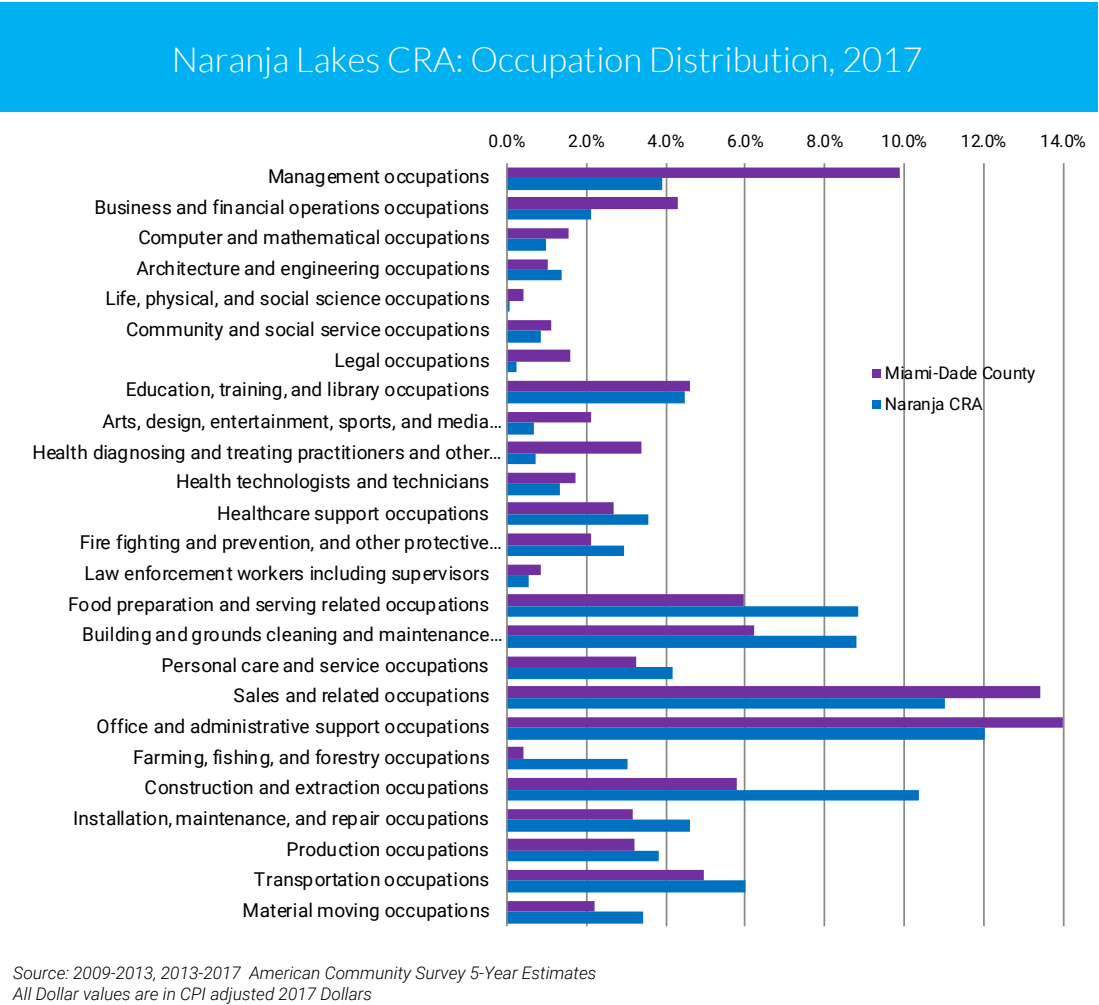


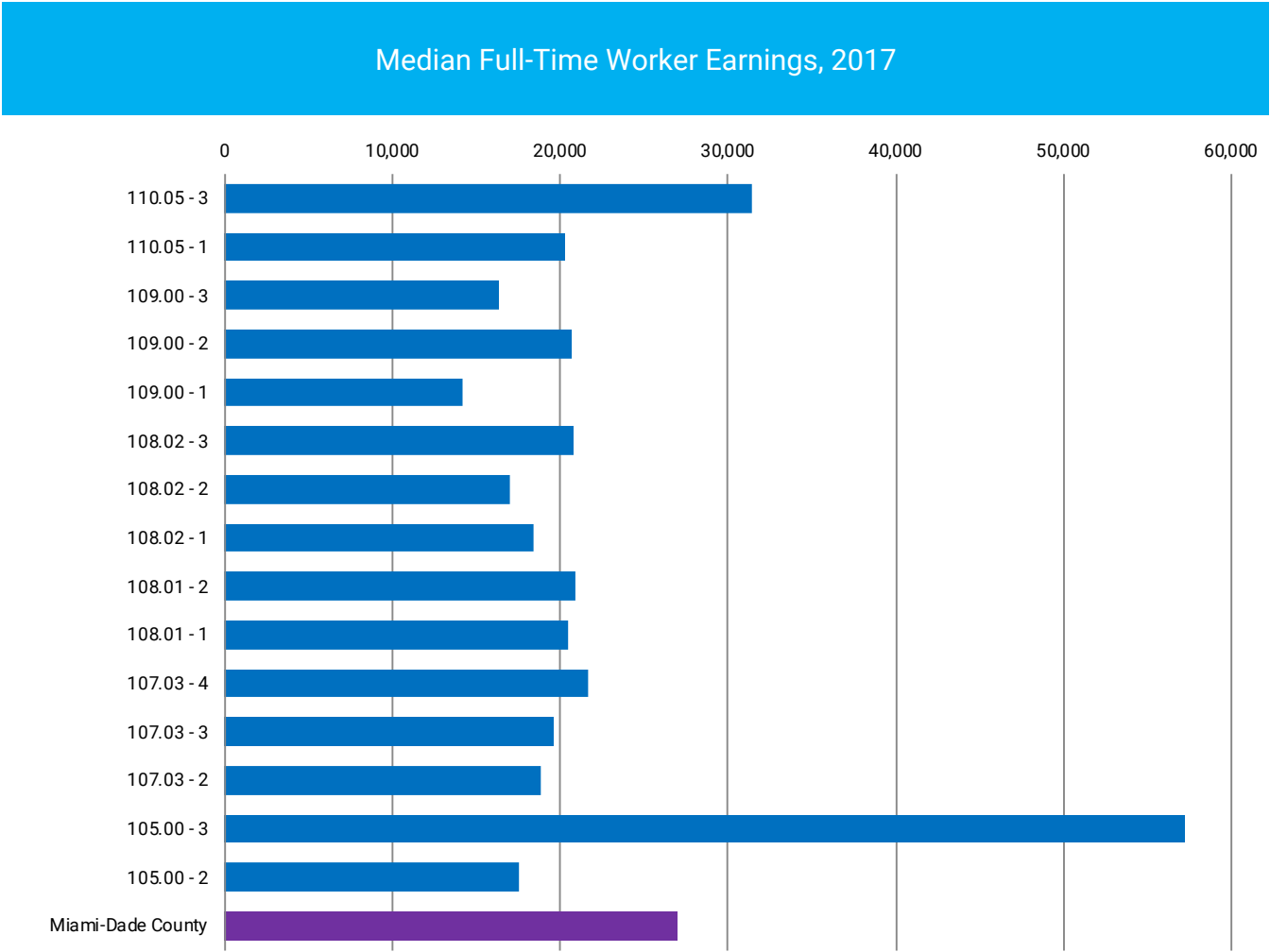
Source: 2009-2013, 2013-2017 American Community Survey 5-Year Estimates

Occupation and Earnings

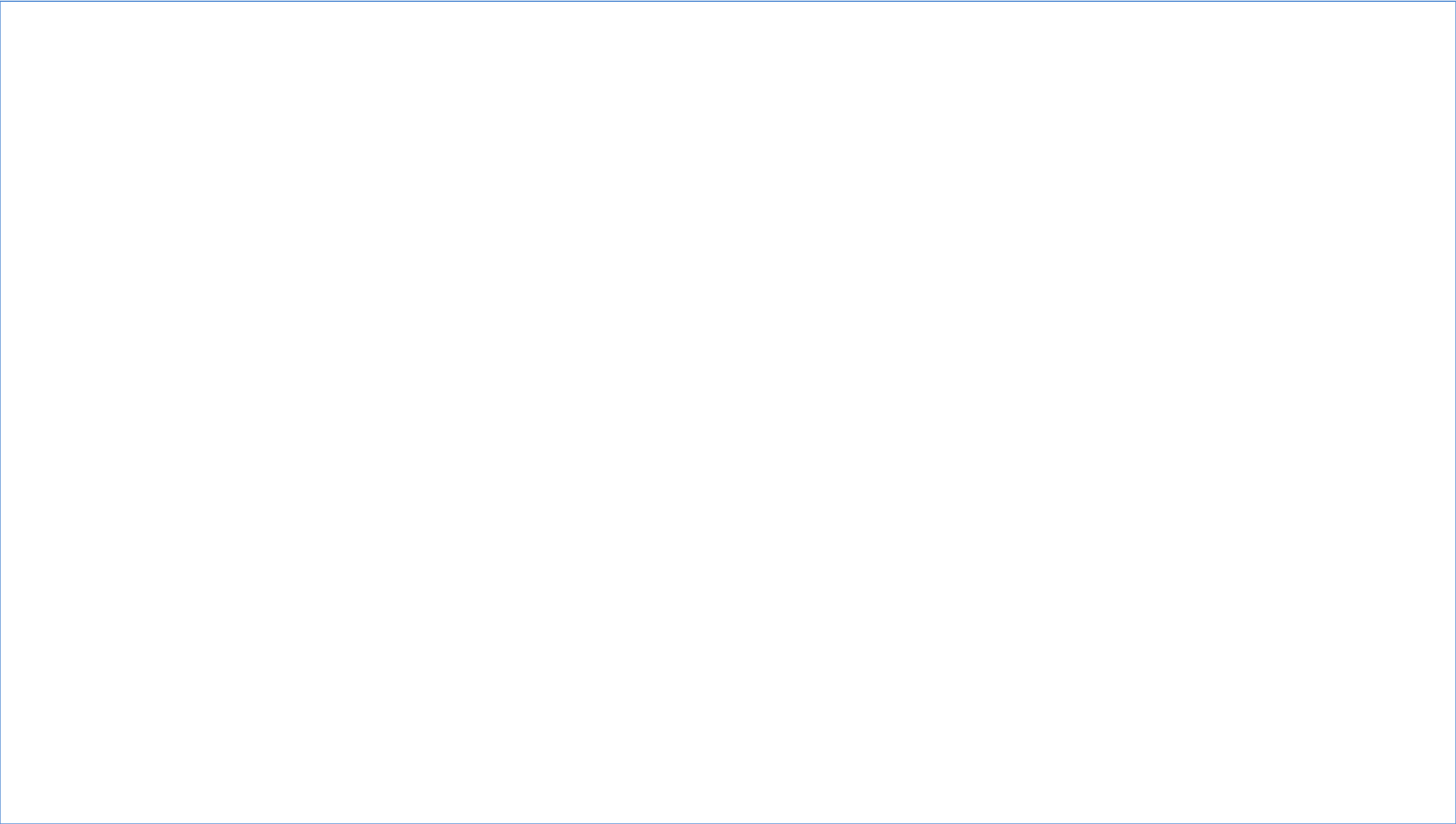
The CRA’s residents are employed in a diverse set of industries and occupations. The distribution of the occupations in which its residents are employed differ from the rest of the County in four ways:

- Compared to the County, a much lower proportion of residents working in management, computing and mathematical occupations, business, financial, science and legal occupations;
- An unusually high concentration of workers in food preparation and serving occupations, as well as building grounds and maintenance occupations;
- Much higher percentages than the County of workers in Farming, construction and extraction (mining), production, transportation, and moving occupations; and
- Median full-time worker earnings below the median for full-time workers across the County. Wage structure across the CRA reflects the high percentages of its workers in less knowledge-intensive industries and occupations.





Source: 2009-2013, 2013-2017 American Community Survey 5-Year Estimates

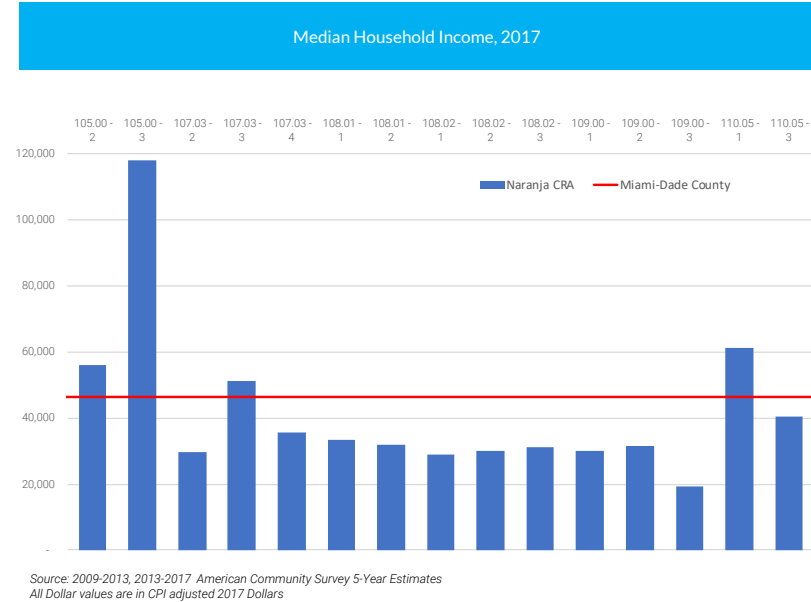
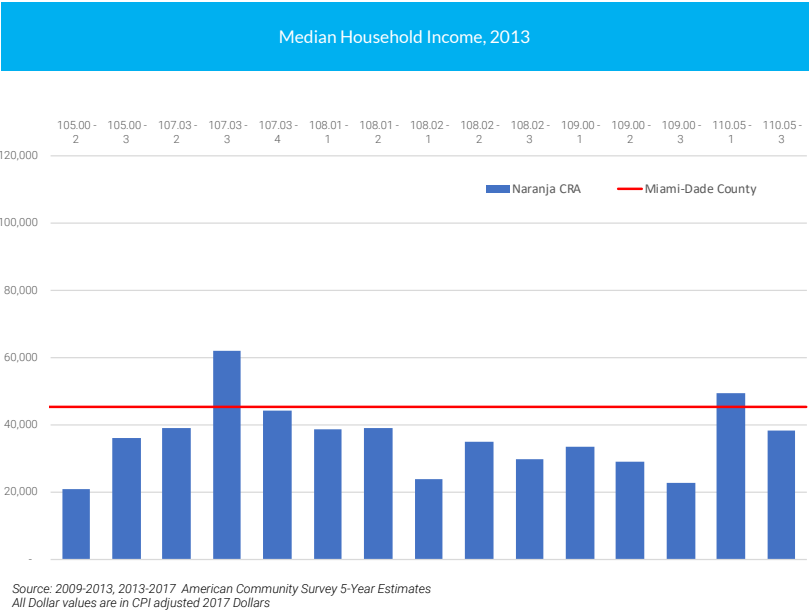


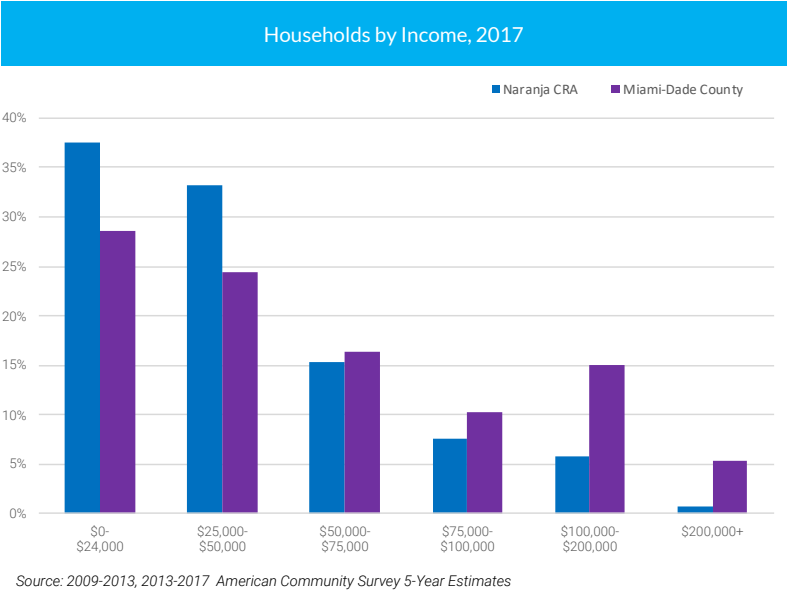
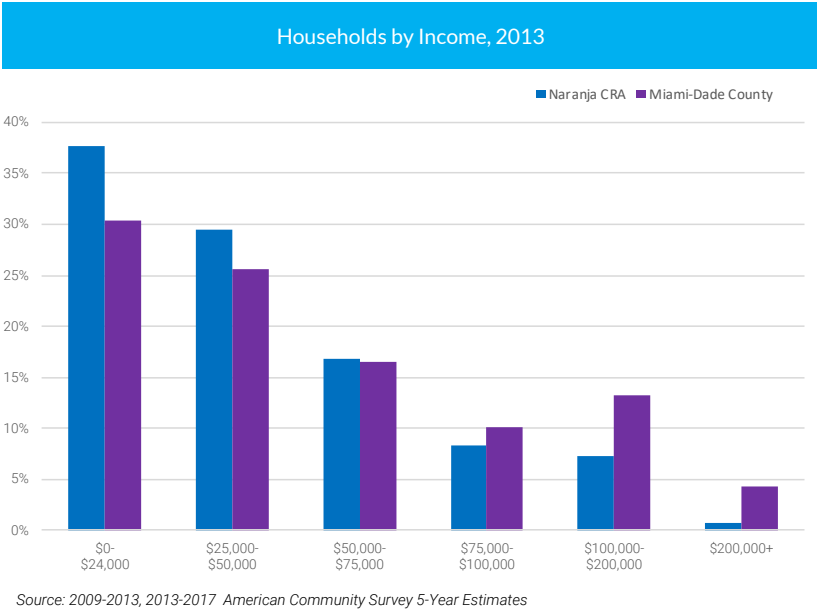
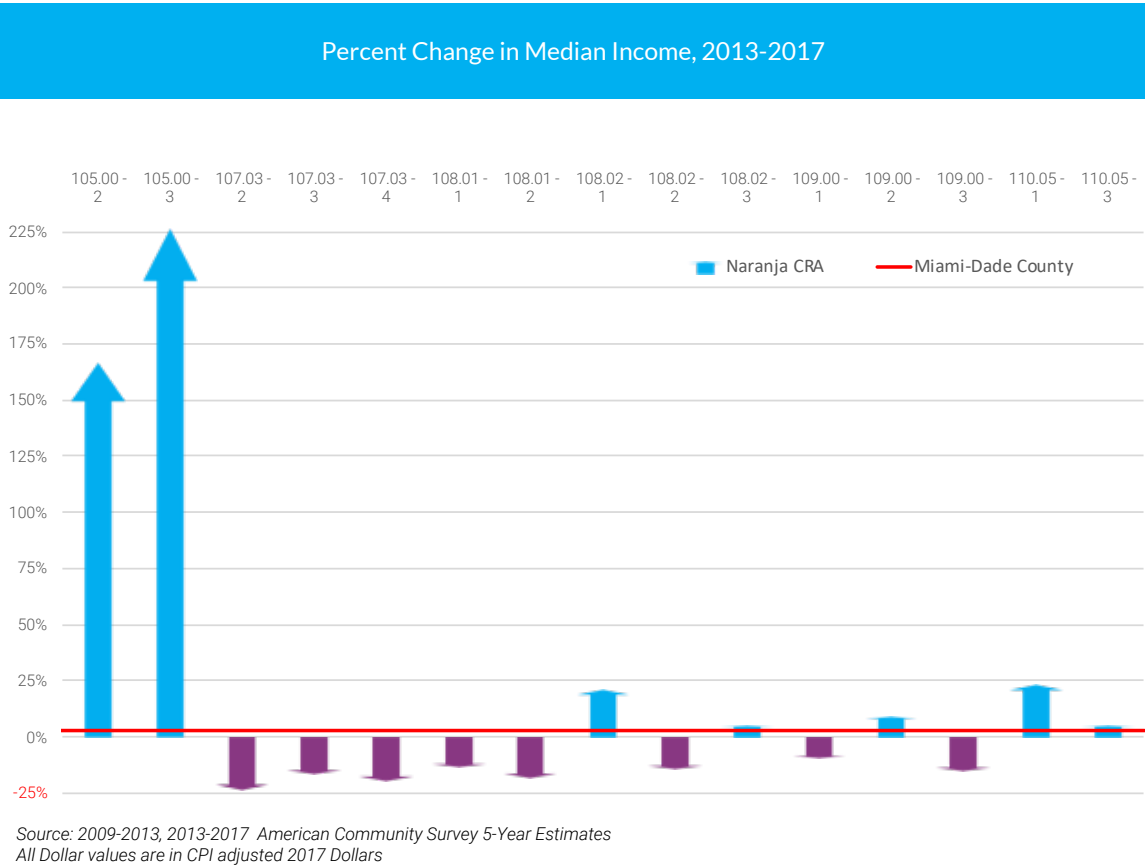
Household Income

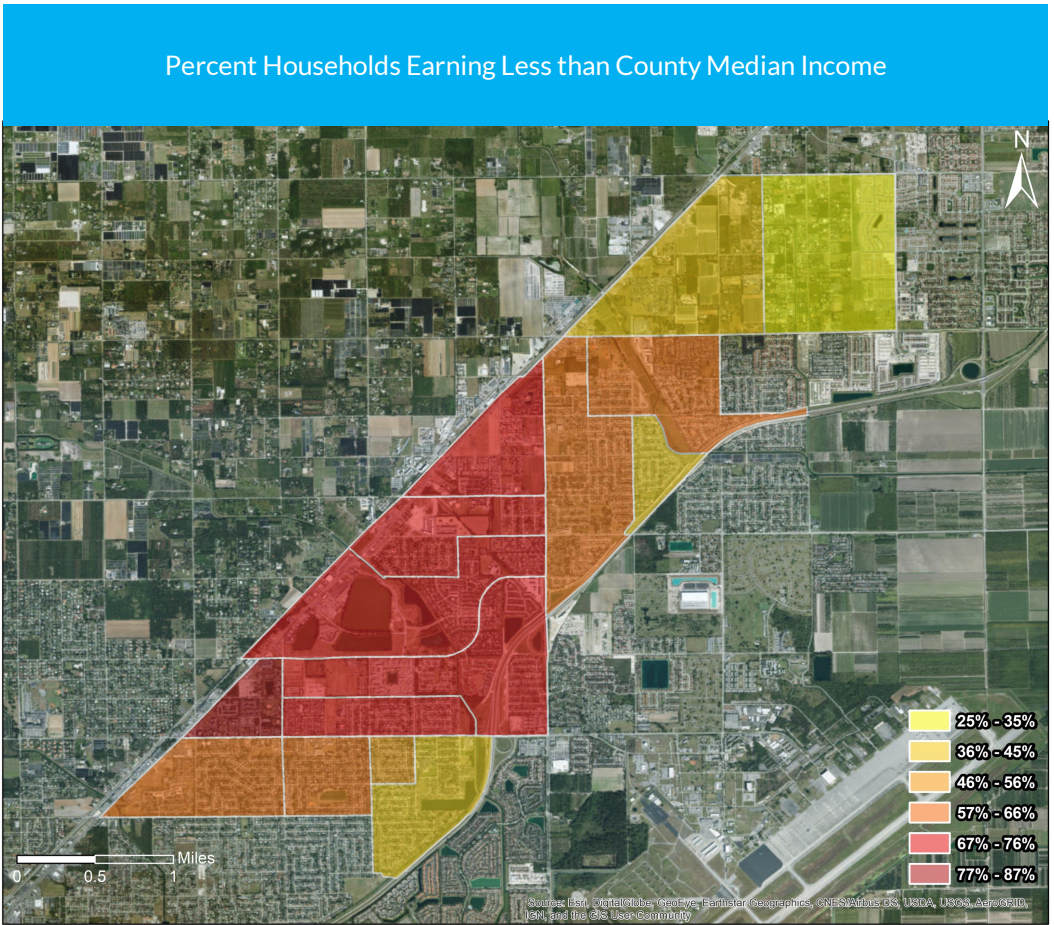
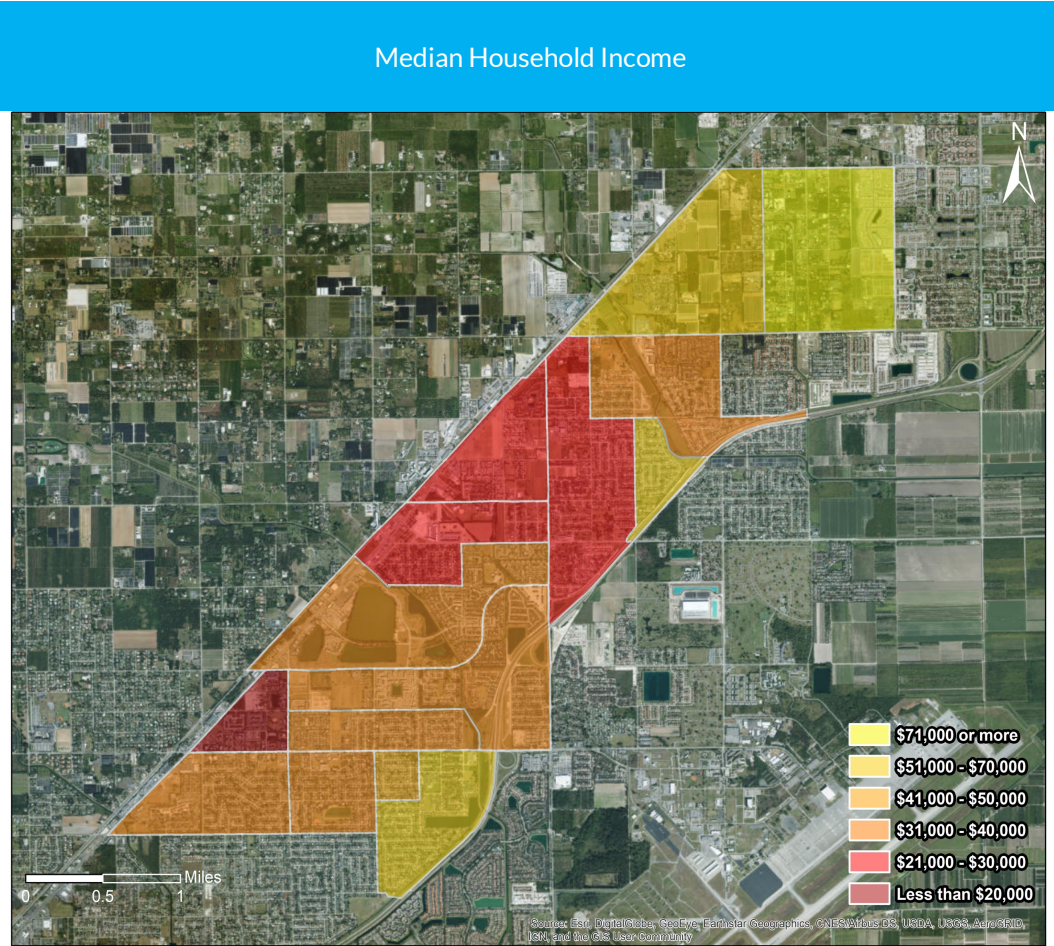
A Community Struggling to Keep Pace

Incomes in Miami-Dade County are lower than the US. The County's household income issues are amplified within the CRA:

- Median household incomes across the CRA are lower than the County median. 11 block groups have lower median household incomes lower than the County;
- Adjusted for inflation, median household income grew by 2 percent across the County from 2013 to 2017. However, incomes across much of the CRA declined over the same period. The median household income declined over the same period in eight of fifteen block groups, from 10 to 24 percent;
- Changes in median income across the CRA resulted in an income structure that now diverges from the County. The distribution of income in 2013 mirrored the County. By 2017 it has a much greater percentage of households earning less than \$50,000, in particular these earning less than \$25,000 per year than the County, and many fewer earning \$100,000 or more than the County; and
- Incomes have become much more widely bifurcated geographically throughout the CRA, with the highest median incomes in the far north and far south of the CRA, with the poorest households concentrated in the mid-central neighborhoods of the CRA.

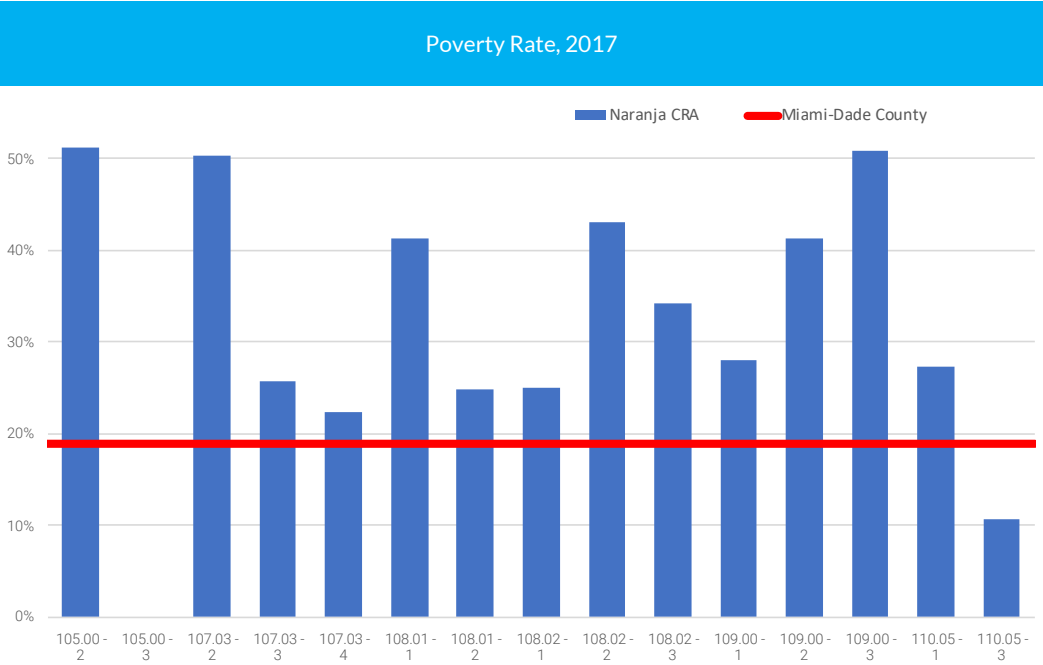




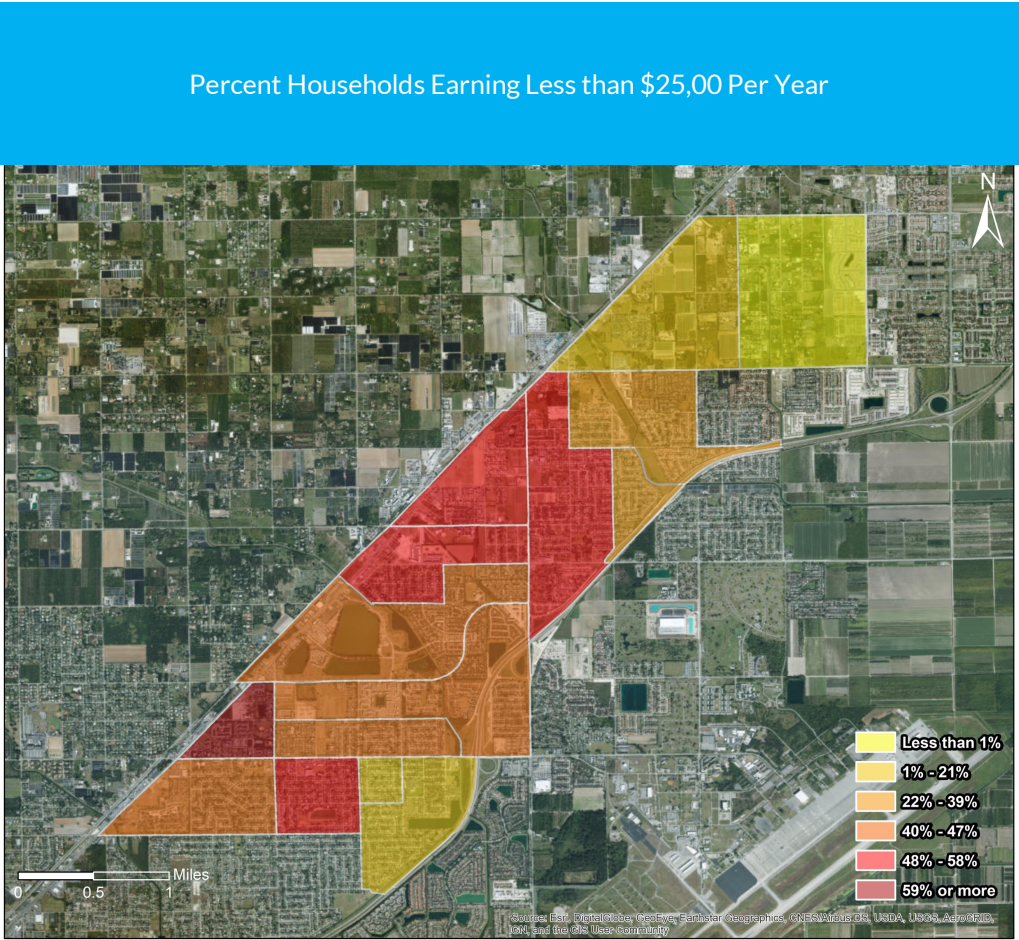


Poverty Rate

High, persistent poverty rates across the CRA are a significant problem with the CRA. At 19 percent of the population living below the poverty line, Miami-Dade County has one of the highest poverty rates of large Counties in the US. **However, thirteen of fifteen block groups within the CRA have higher poverty rates than the County, peaking at over 50 percent in three block groups.**



Source: 2009-2013, 2013-2017 American Community Survey 5-Year Estimates
All Dollar values are in CPI adjusted 2017 Dollars



Housing

Why Housing Matters

Safe, suitable housing has far reaching impacts which drive the economic growth, development and competitiveness of the CRA. Developing an affordable and sustainable housing market in the CRA is crucial for a number of important reasons:

- Owning a home is the largest single asset investment held by most Americans — the cornerstone of upward economic mobility and wealth building for middle-and low-income families. Improving housing affordability lies at the center of improving economic mobility for households in the CRA;
- Housing costs represent the single largest component of total household expenses for most American families. Money left over after housing expenses drives spending for local goods and services;
- Housing affordability affects educational performance and attainment. Households with better affordability ratios generally have higher rates of savings, more cash, and/or higher levels of equity (in an owned home) that can be applied to education spending for their children, including higher education costs. Recent research found that children of families spending around 30 percent of their income on housing costs had significantly higher math and reading test scores than families who spent more than 50 percent of their income on housing;
- Affordable, higher quality housing leads to better family health outcomes. Households with lower cost burden rates have more income available for available for health care expenditures, including insurance. Families on the margin of home affordability are often forced to choose between health care and paying the rent or mortgage, and a single unexpected health expense can throw a family into foreclosure or eviction;
- High housing prices, tight mortgage lending practices, and high rents relative to local incomes impacts workers in essential occupations, including police, fire, teachers, health care workers, and many professional occupations. High costs also forces younger workers and college graduates just entering the workforce to leave the region, hampering regional talent retention, posing a threat to long-term regional economic development; and

- Housing plays and increasingly important role in small business growth and employment. According to the US Small Business Administration, 65 percent of all new businesses are created in the home, and many remain there even after hiring employees. In addition, American employees and managers increasingly work from home.

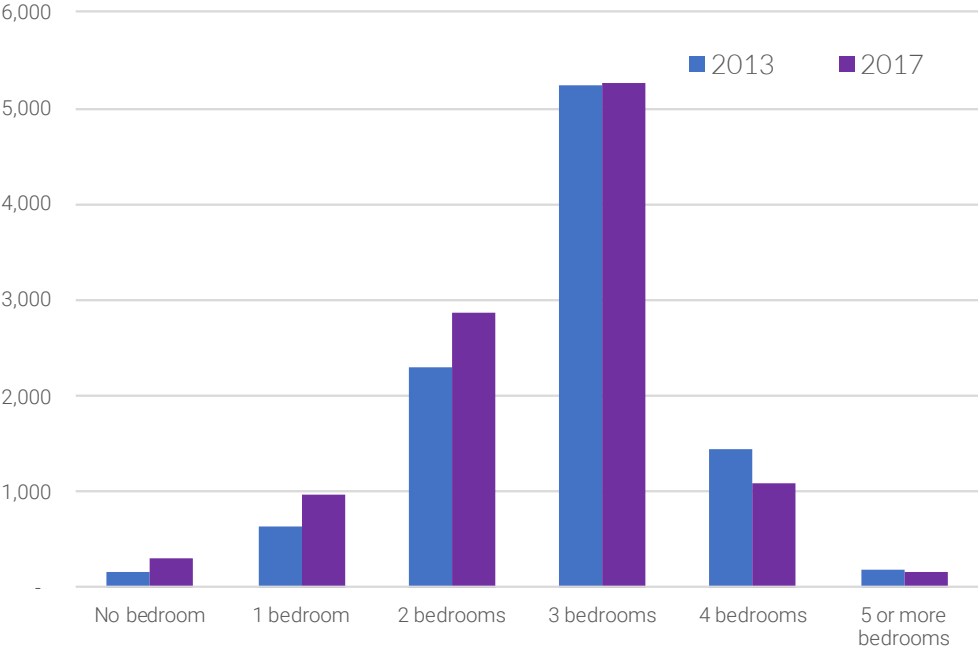
Housing Supply Analysis

Housing Type Distribution

The CRA's total supply of 10,632 housing units (all types), is the result of an explosive 7 percent growth in housing supply from 2013 to 2017, compared to 2 percent for the rest of the County. Other significant characteristics of the CRA housing inventory are as follows.

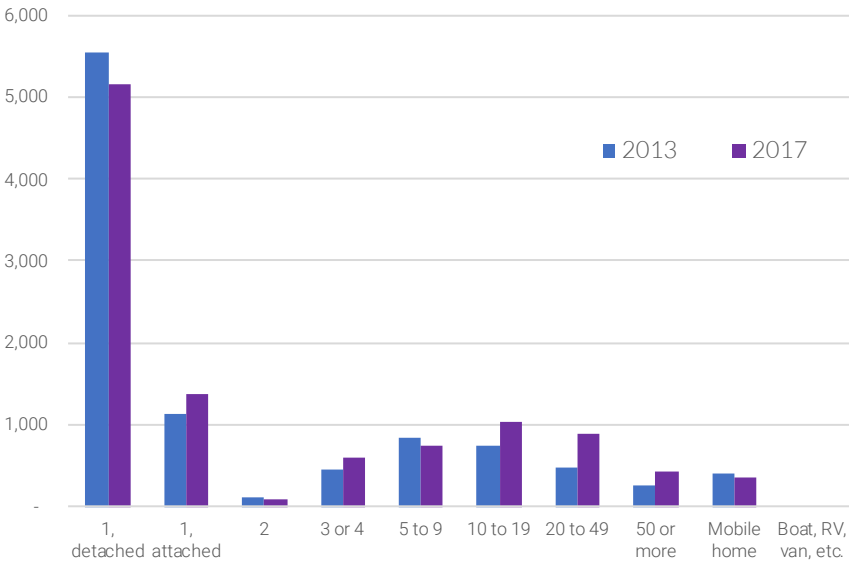
- **Growth driven by multifamily development:** Multifamily units accounted for all of the growth of housing units in the CRA. The number of single-family units declined by 7% from 2013 to 2017, while the number of multifamily units grew by 30 percent, far outpacing the growth of multifamily development across the County, at 5%;
- **High proportion of single-family homes:** Even with the decline in supply of single-family homes, they still make up largest portion of homes in the CRA, and at 48 percent of all homes, much more so than the rest of the County (40% percent of all homes);
- **Rapid Tightening of supply:** The total number of vacant housing units decreased by 40% from 2013 to 2017. The number of vacant rental units decreased by 64 percent, while the number of for-sale units decreased by 70 percent over this period. In addition, the CRA has much lower supply of vacation rentals than the rest of the County;
- **Higher portion of larger multi-bedroom units:** Similar to the County, 3-bedroom units make up 49% of all housing units. The CRA has a larger comparative supply of 4- and 5-bedroom units, and a much smaller component of 0,1, and 2-bedroom units. **However, growth of the housing unit supply in the CRA has been driven by the rapid expansion of 0,1, and 2-bedroom units;** and
- **Housing development is geographically concentrated within the CRA.** Single family homes are generally concentrated in the north and south ends of the CRA, while townhouse and multi-family homes are for the most part centrally located within the CRA.

Housing Units by Bedrooms, 2013-2017



Source: 2009-2013, 2013-2017 American Community Survey 5-Year Estimates

Housing Units by Type, 2013-2017



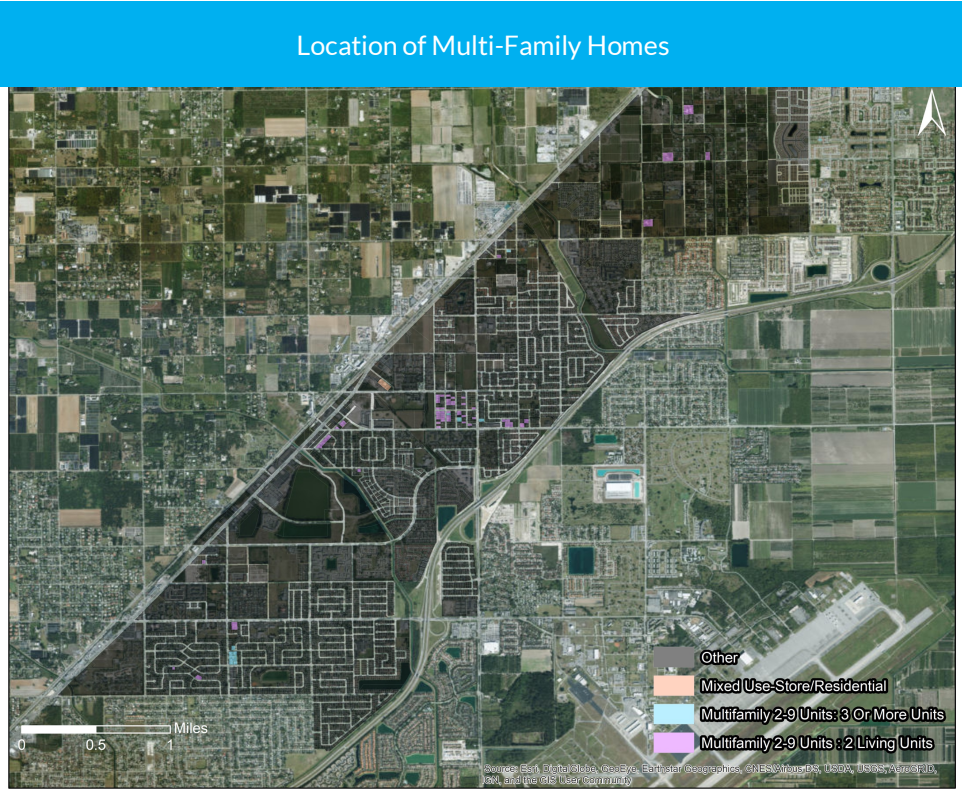
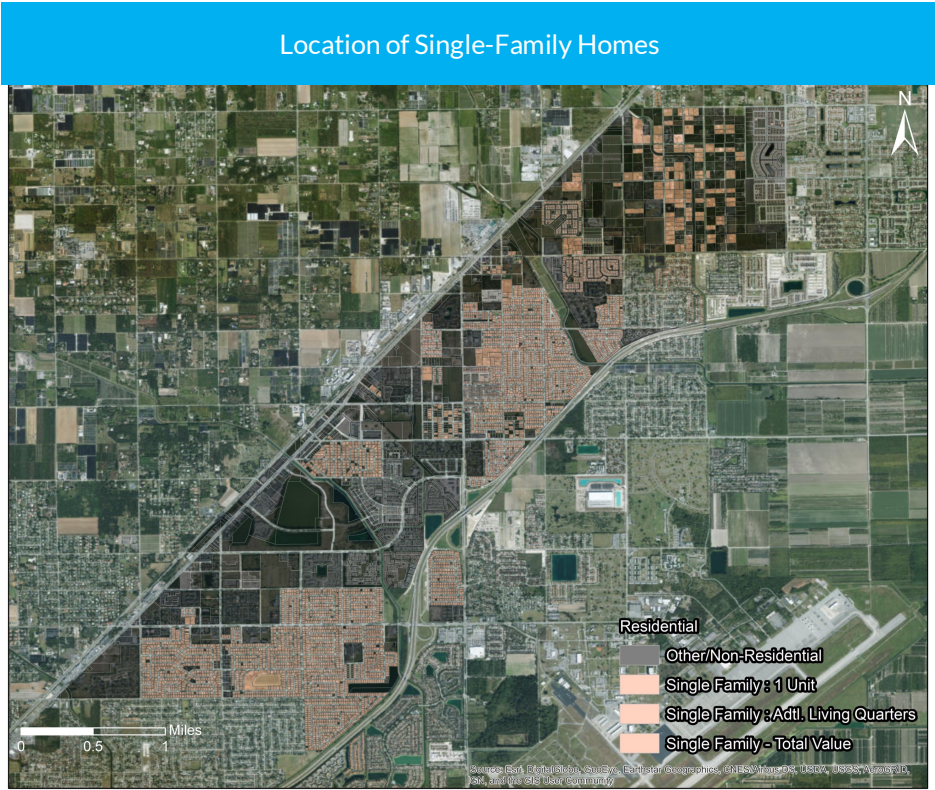
Source: 2009-2013, 2013-2017 American Community Survey 5-Year Estimates

| Housing Units by Type | Naranja CRA | | | | Miami-Dade County | | | |
|-----------------------|-------------|--------|-----|-----------|-------------------|-----------|-----|-----------|
| | 2013 | 2017 | % | 2013-2017 | 2013 | 2017 | % | 2013-2017 |
| Total | 9,963 | 10,632 | | 7% | 990,697 | 1,008,908 | | 2% |
| 1, detached | 5,555 | 5,152 | 48% | -7% | 405,691 | 402,273 | 40% | -1% |
| 1, attached | 1,126 | 1,364 | 13% | 0% | 102,181 | 101,184 | 10% | 0% |
| 2 | 117 | 92 | 1% | -21% | 20,745 | 19,091 | 2% | -8% |
| 3 or 4 | 445 | 592 | 6% | 33% | 34,136 | 35,151 | 3% | 3% |
| 5 to 9 | 838 | 731 | 7% | -13% | 50,088 | 53,378 | 5% | 7% |
| 10 to 19 | 737 | 1,025 | 10% | 39% | 62,447 | 69,799 | 7% | 12% |
| 20 to 49 | 486 | 899 | 8% | 85% | 87,590 | 88,666 | 9% | 1% |
| 50 or more | 263 | 416 | 4% | 58% | 214,382 | 225,995 | 22% | 5% |
| Mobile home | 396 | 361 | 3% | -9% | 13,008 | 13,071 | 1% | 0% |
| Boat, RV, van, etc. | - | - | 0% | 0% | 429 | 300 | 0% | 0% |

Source: 2009-2013, 2013-2017 American Community Survey 5-Year Estimates

| Vacancy Status | Naranja CRA | | | | Miami-Dade County | | | |
|---|-------------|--------|----|-----------|-------------------|-----------|-----|-----------|
| | 2013 | 2017 | % | 2013-2017 | 2013 | 2017 | % | 2013-2017 |
| Total Housing Units | 9,963 | 10,632 | | 7% | 990,697 | 1,008,908 | | 2% |
| Total Vacant Housing Units | 1,246 | 744 | 7% | -40% | 162,666 | 150,619 | 15% | -7% |
| For rent | 592 | 214 | 2% | -64% | 35,136 | 28,071 | 3% | -20% |
| Rented, not occupied | 75 | 57 | 1% | -24% | 7,491 | 6,583 | 1% | -12% |
| For sale only | 181 | 55 | 1% | -70% | 15,258 | 9,223 | 1% | -40% |
| Sold, not occupied | - | 54 | 1% | - | 5,305 | 6,120 | 1% | 15% |
| For seasonal, recreational, or occasional use | - | 19 | 0% | - | 67,780 | 71,818 | 7% | 6% |
| For migrant workers | 16 | - | 0% | -100% | 218 | 208 | 0% | -5% |
| Other vacant | 382 | 345 | 3% | -10% | 31,478 | 28,596 | 3% | -9% |

Source: 2009-2013, 2013-2017 American Community Survey 5-Year Estimates



A Rapid Shift from Home Ownership to Rental Housing

Demographics and economics have shifted the homeownership rate significantly downward since 2008.

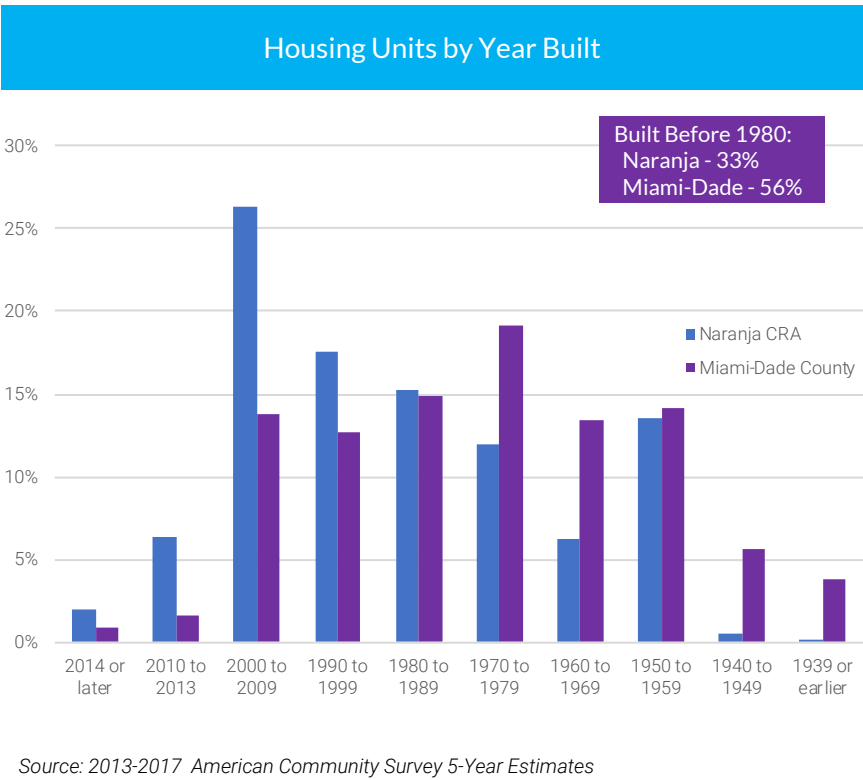
- The homeownership rate in the County declined from 56 to 52 percent from 2010 through 2017;
- The shift has been dramatically larger in the CRA — homeownership declined from 54 to 41 percent of all homes from 2010 to 2017; and
- Home ownership rates vary widely across the CRA, from a low of 5 to a high of 89 percent across the CRA Block groups.



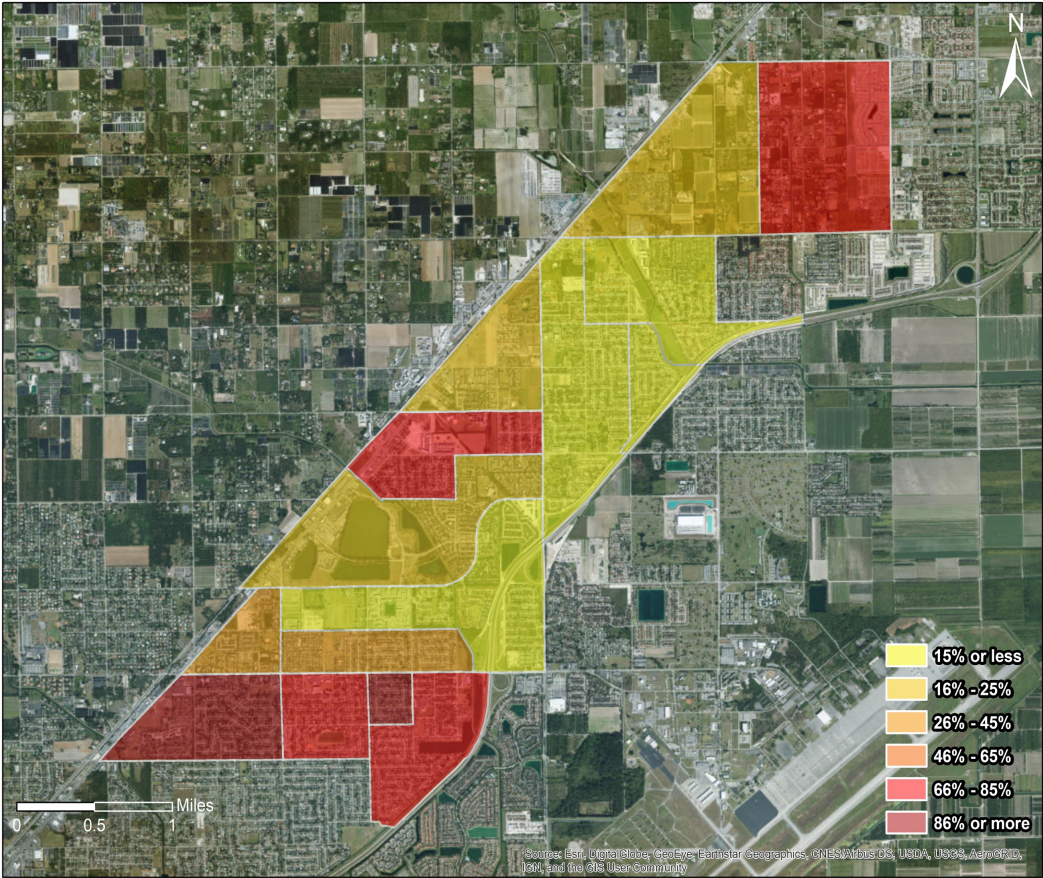
Age of Housing Supply – a Newly Built Community

Housing stock age affects demand, pricing, as well as maintenance costs. Older housing requires more extensive rehabilitation and maintenance, stretching homeowner budgets. The bulk of the CRA’s housing supply, unlike the rest of the County, has been built after 1990. A full 52 percent of the CRA’s housing supply, compared to only 29 percent for the rest of the County, has been built since 1990. Older homes built before 1980 make up only 33 percent of the Naranja housing stock.

Again, the age of units varies widely across the CRA, with the largest concentrations of older units in the north and far southern block groups.



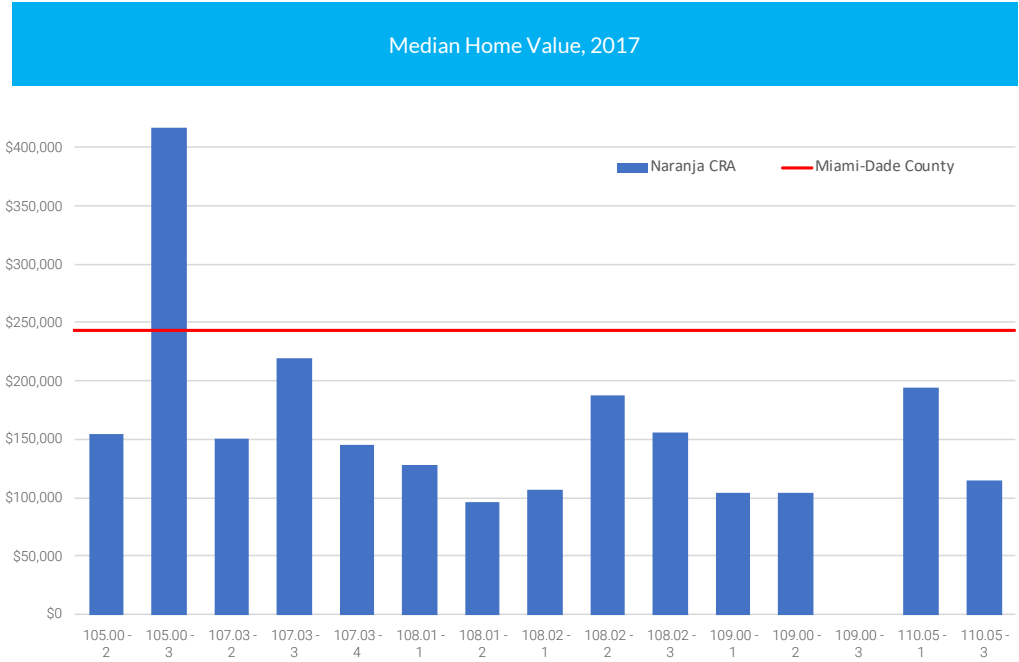
Percent Housing Units Built Before 1980



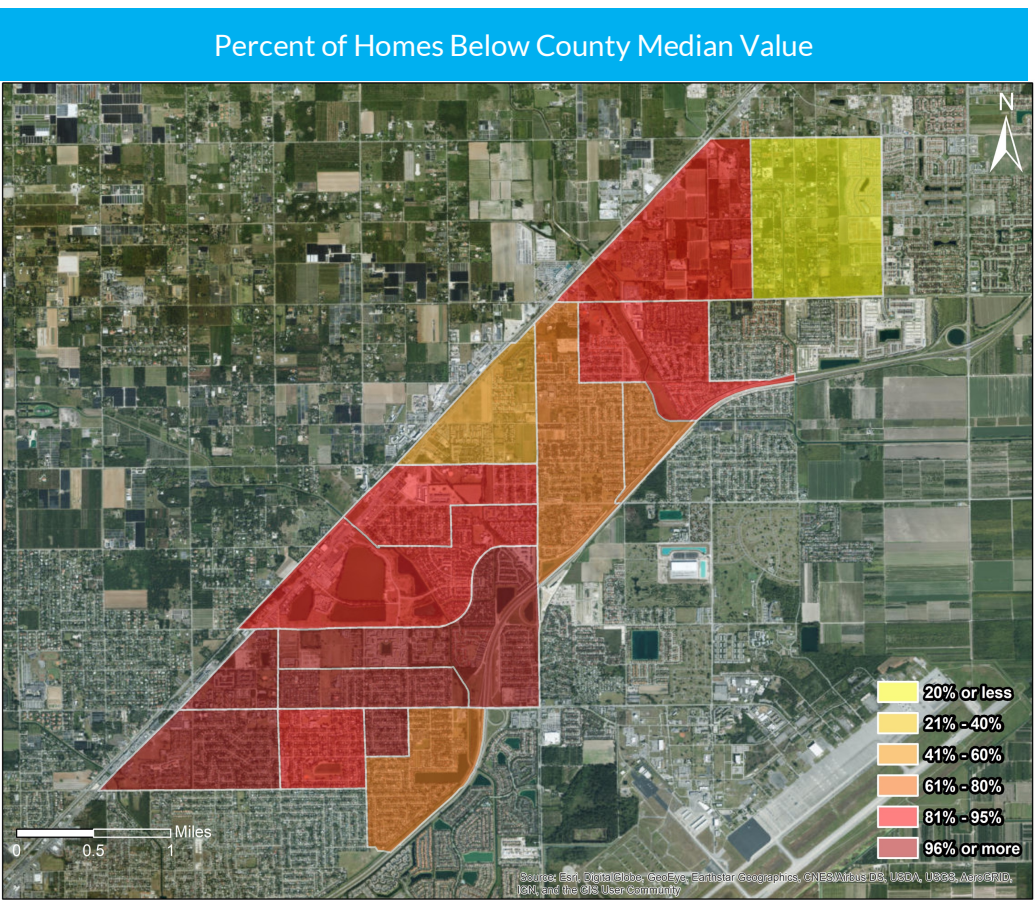
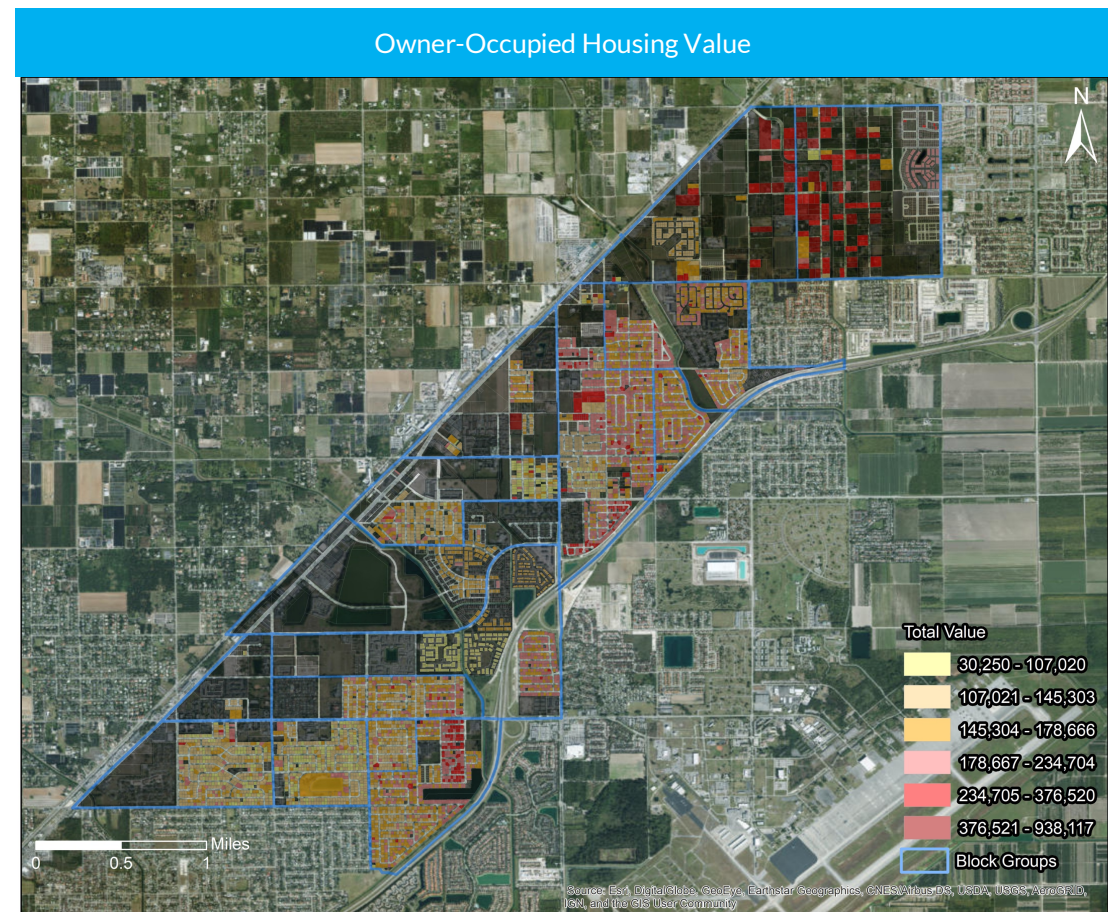
CRA Housing Values

Despite the rate of new construction, housing values across the CRA are significantly less than the rest of the County. The median Value of all owner-occupied homes is greater than the County in only one block group — 105.3 — where the median home value exceeds \$400,000. Median home values are lowest in the mid and southern portion of the CRA. In addition, the largest concentration of low-value homes — those less than \$125,000 — is in the far southern portion, where 55 to 65 percent of the homes are valued at less than \$125,000.

Median Home Value, 2017

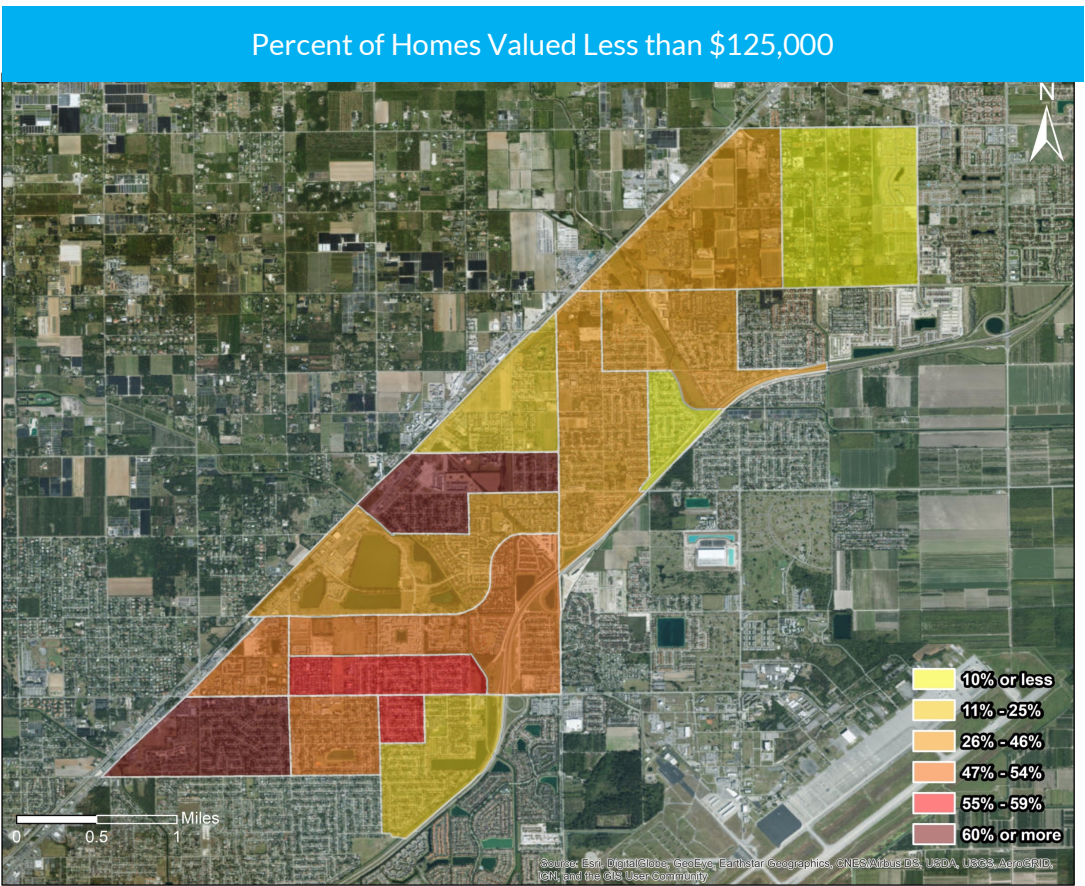
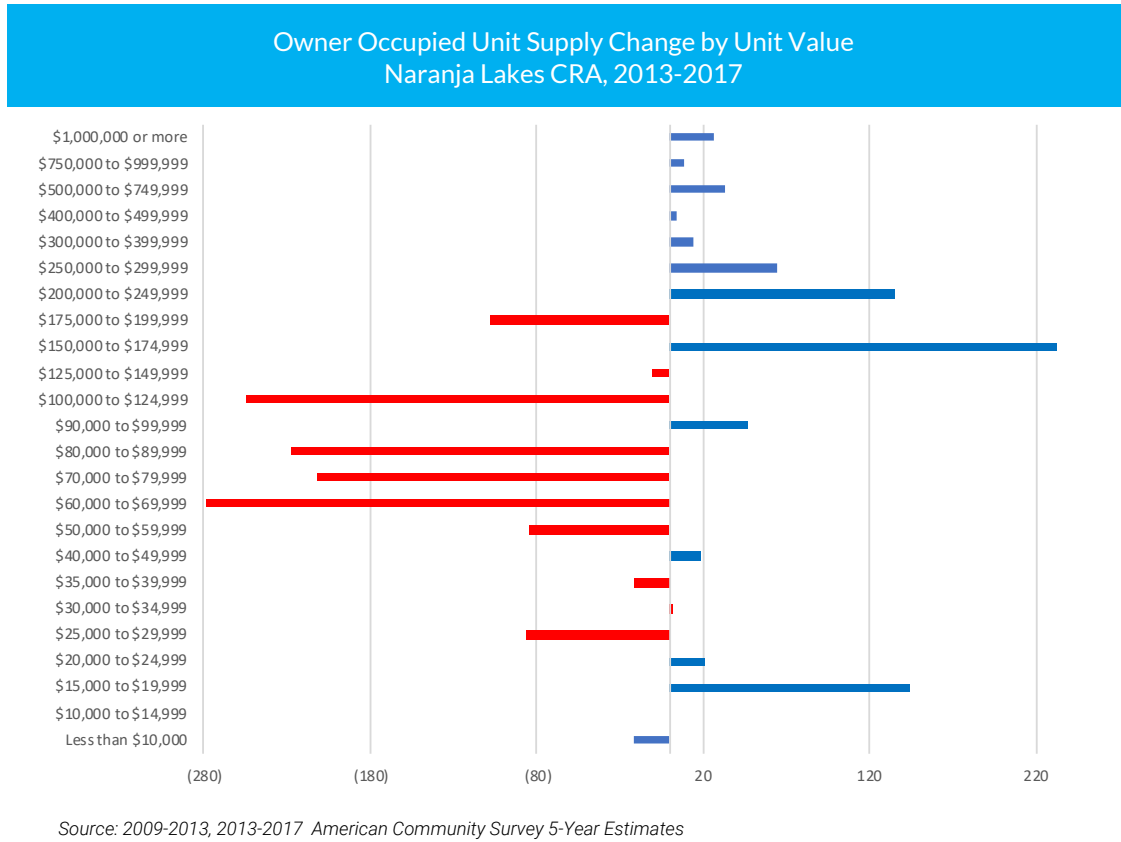


Source: 2009-2013, 2013-2017 American Community Survey 5-Year Estimates
All Dollar values are in CPI adjusted 2017 Dollars



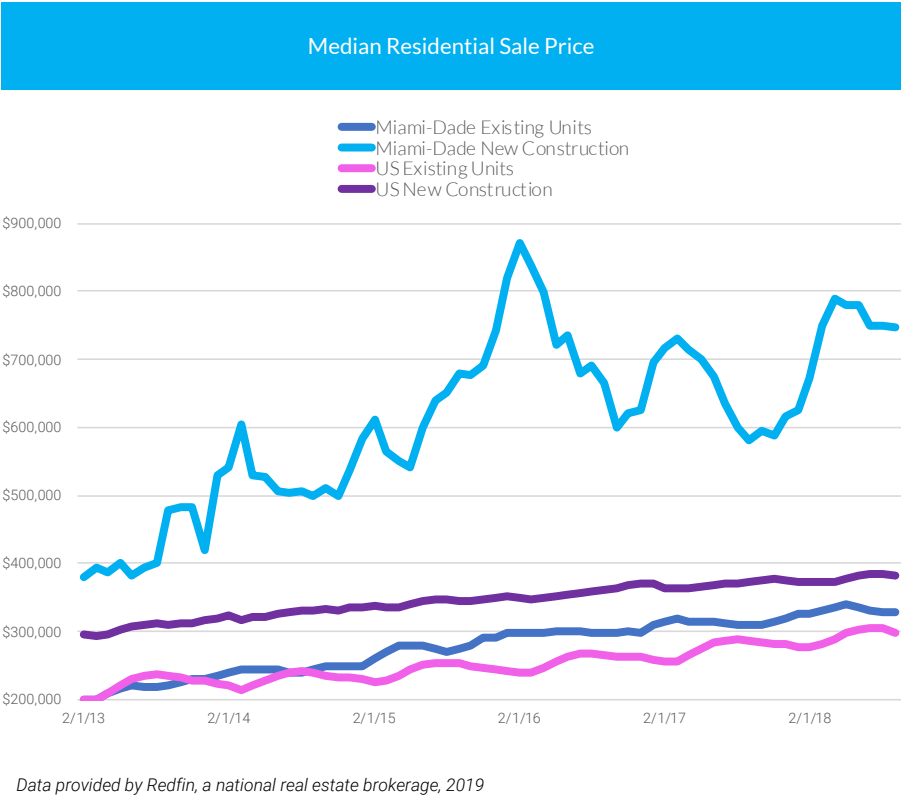
The Shrinking Supply of Affordable Housing

The lower overall value of housing in the CRA represents a potential supply of affordable housing, if maintained properly. However, despite lower housing values, the supply of affordable housing — units priced from \$50,000 to \$200,000 — are shrinking within the CRA. The growth of owner-occupied units in the CRA has been driven by an expansion in the supply of units valued at over \$200,000.



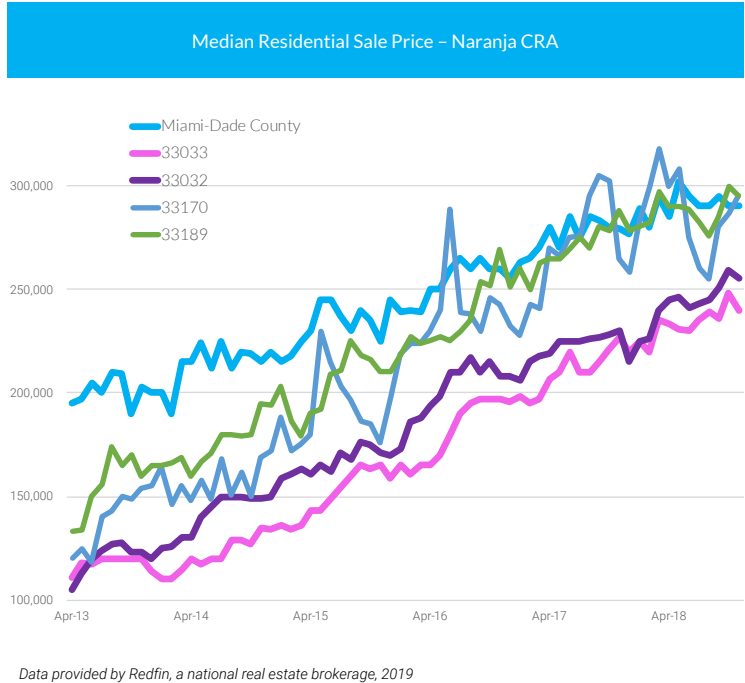
Housing Sale Price

Sale prices for housing in the County and CRA pose a growing affordability problem for homeowners looking to move into the area, existing homeowners needing a larger home, and new homeowners. Median sale prices, especially for new housing, across the County, has increased over 41 percent since 2013, almost 1.5 times the national increase in sale prices. ***Within the CRA, median sale prices have increased from 105 to over 134 percent since 2013.***



| Median Sale Price, 2013-2017 | | | |
|------------------------------|------------|---------------|------------|
| | April 2013 | November 2018 | % Increase |
| US | 230,434 | 298,000 | 29% |
| Miami-Dade County | 205,181 | 290,000 | 41% |
| Zip Code 33032 | 110,482 | 255,000 | 131% |
| Zip Code '33033 | 116,795 | 240,000 | 105% |
| Zip Code 33170 | 126,265 | 295,000 | 134% |
| Zip Code 33189 | 139,944 | 295,000 | 111% |

Data provided by Redfin, 2019
All Dollar values are in CPI adjusted 2017 Dollars

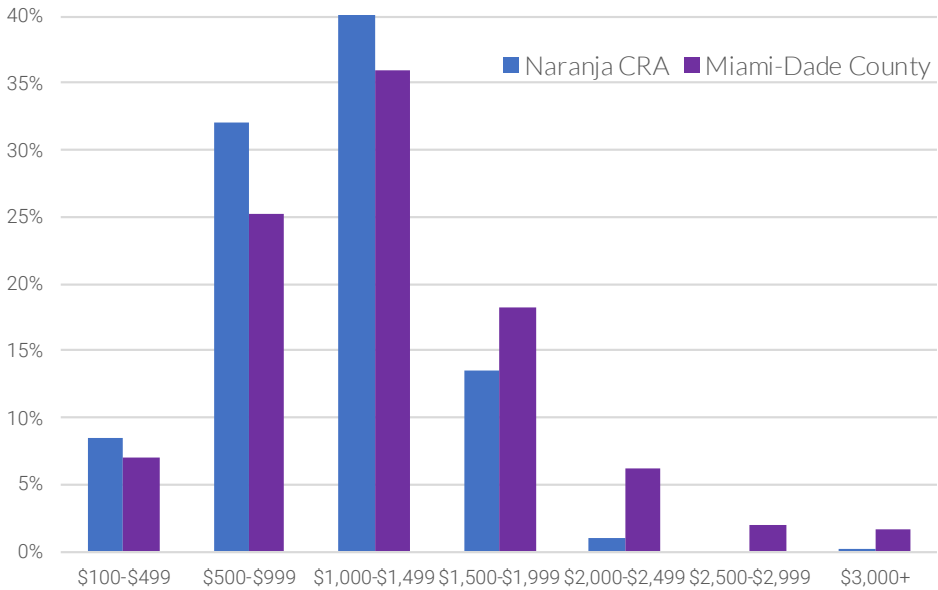


Housing Rents

Overall, rents in the CRA are lower than the remainder of the County. Median rents in 9 of 15 block groups are lower than the County median gross rent, and in 7 of 15 block groups gross rents adjusted for inflation **declined** from 2013 to 2017.

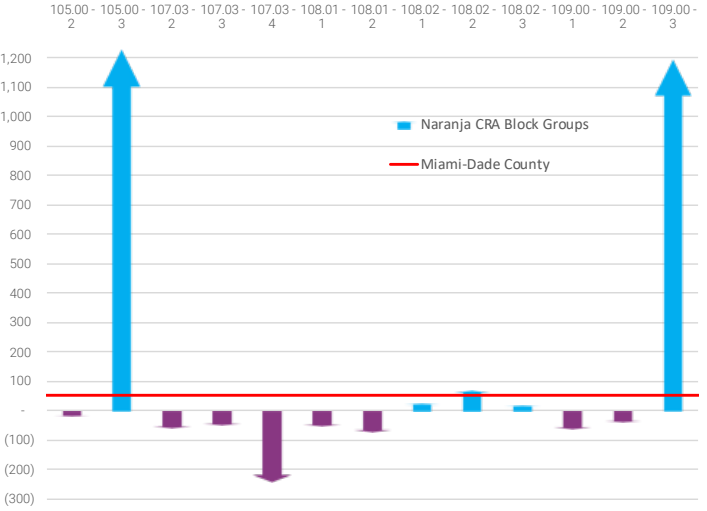
The CRA rental market is becoming a highly split market, with the growth in number of rental units driven by a large increase in units renting for over \$1,000 per month, and smaller growth of units at the lower end of the rent scale below \$350 per month. The number of rental units in the middle range — from \$350 to \$700 per month — declined sharply from 2013 to 2017. The market is now characterized by rapid growth of indicates growth of luxury and low-income units, but tightening of supply for middle-income families and workers.

Households by Gross Rent, 2017



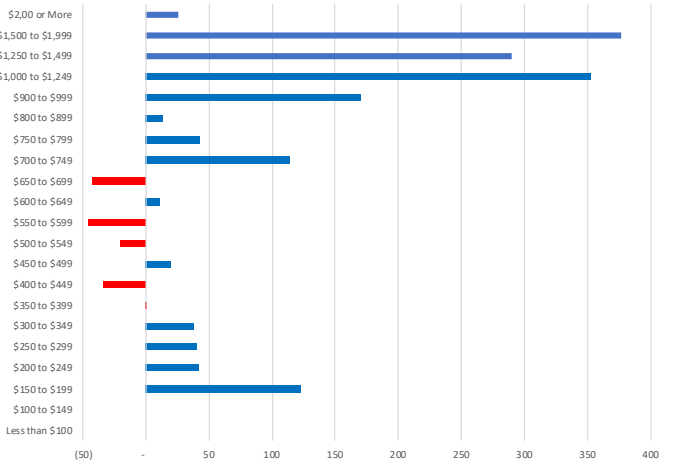
Source: 2009-2013, 2013-2017 American Community Survey 5-Year Estimates

Change in Median Gross Rent, 2013-2017



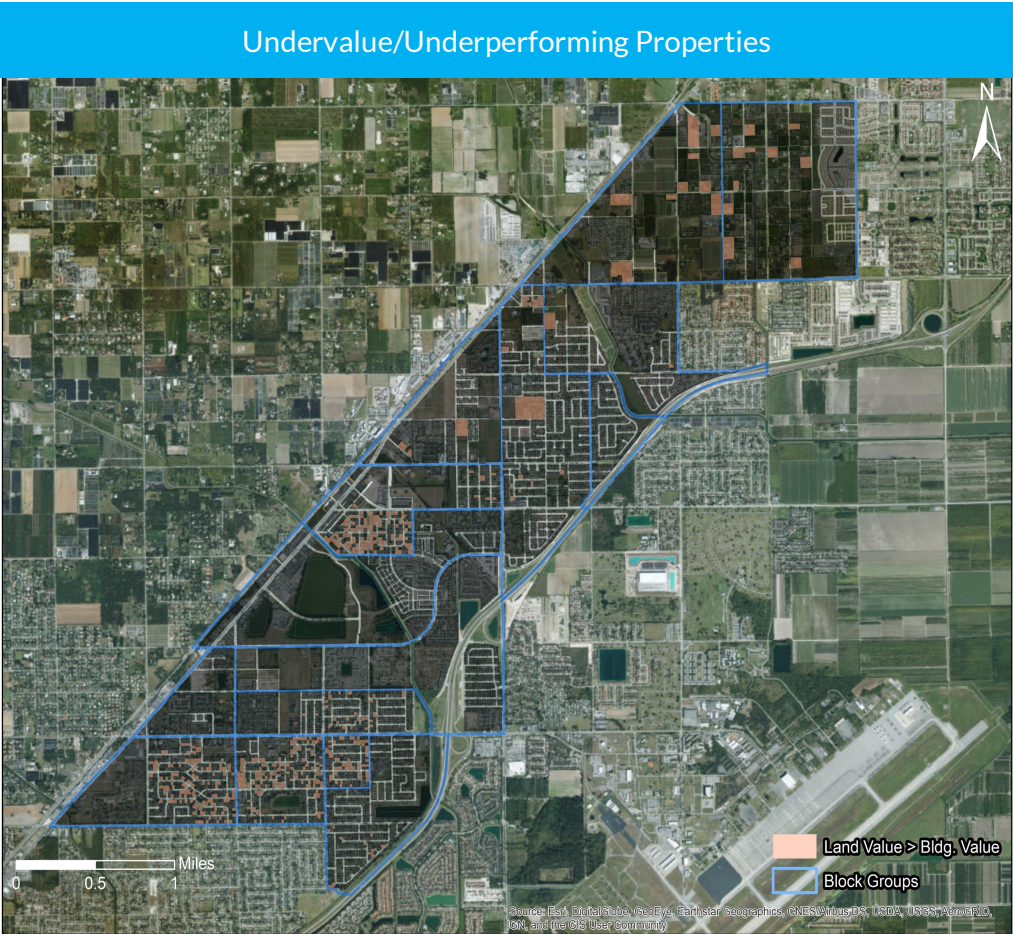
Source: 2009-2013, 2013-2017 American Community Survey 5-Year Estimates
All Dollar values are in CPI adjusted 2017 Dollars

Renter Household Supply by Rent Paid
Naranja Lakes CRA, 2013-2017



Underperforming Properties

Low value and underperforming properties, including foreclosed properties, can be opportunities to provide affordable housing for middle- and low-income families. However, they can also depress surrounding property values within ¼ to ½ mile by as much as 7 to 26 percent. Undervalued properties — non-vacant properties whose land value is greater than the value of structures on them — are shown on the map below.



Housing Affordability Analysis

The US Department of Housing and Urban Development's benchmark for affordable housing is that it should cost no more than 30% of a household's gross income. Most banks determine a home as affordable to a potential borrower if housing costs are less than 36% of household income.

Based on those standards, *the Miami-Dade County housing market is one of the most unaffordable in the nation.* Housing unaffordability in Miami-Dade results from a combination of high, and rising housing prices combined with comparatively lower incomes.

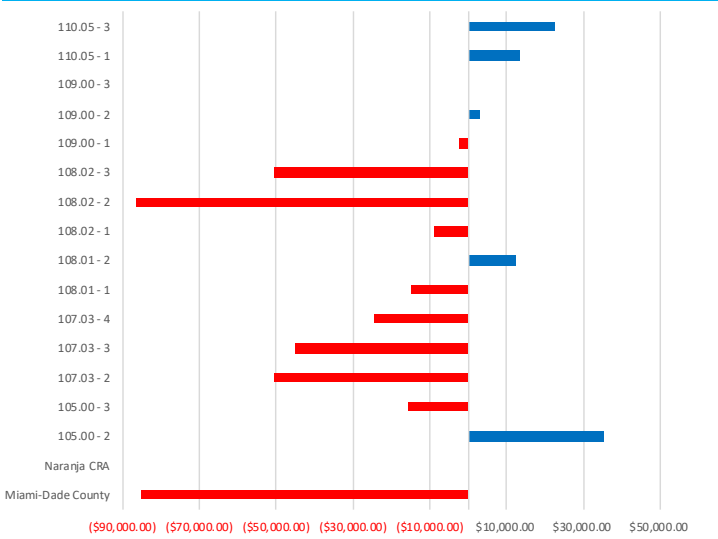
Affordability Gap Analysis

Based on the HUD affordability standard, and a model adopted from FHA lending standards, the income required to afford a median valued home in Miami-Dade County (\$242,800) is **\$71,373**. The income required to afford the median sale price of a home in the County is **\$87,599**.

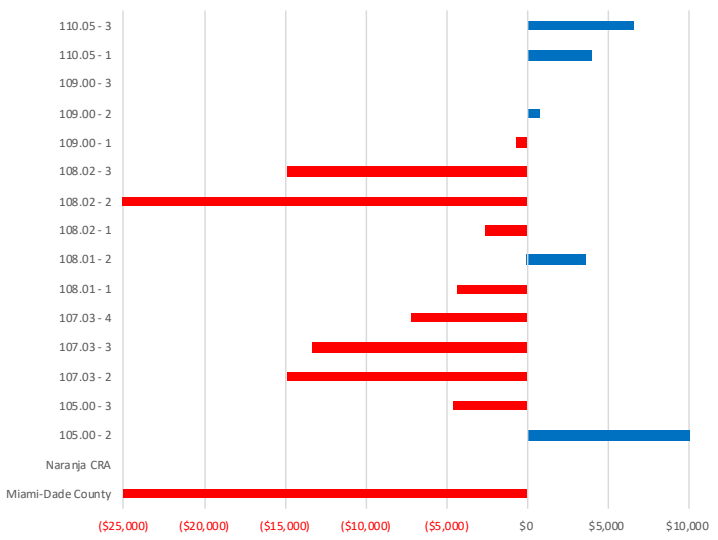
Based on state salary data, this means that 1,019,900 workers, or just over 90 percent all full-time employed workers in the County cannot afford a median-priced home in Miami-Dade. 69 percent of all households in the County cannot afford a median sale-priced home, and in the CRA 86 percent of all households cannot afford a median priced home.

The gaps between the median home sale price and what is affordable to households in the CRA varies widely. In only 5 block groups is the median home value affordable to households at the median income. The gap between the block group median value and what is affordable to homes in that block group at the median income varies from \$5,000 to over \$86,000. The same applies to the gap between the income required to afford a median valued home and the median household income in each CRA block group.

Gap Between Affordable Home Price for Median Income Household and Median Home Price



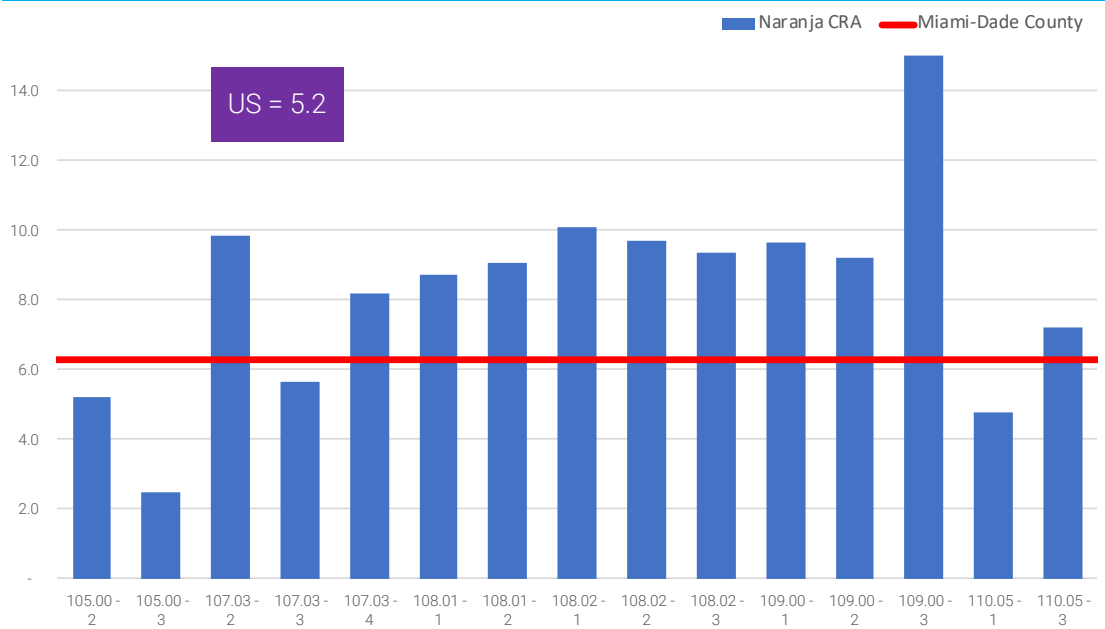
Gap between Median Household Income and Income Required to Afford Median Price Home



Housing Cost Multiplier

A second way to measure unaffordability is the ratio of median household income to median home value or sale price. Across the US, the median home sale price is 5.2 times the median household income. Across Miami-Dade, the average is 6.3. ***In 11 of 15 block groups in the CRA, the housing price-income ratio exceeds the County average, reaching as high as 15.***

Ratio of Median Home Sale Price to Median Household Income, 2018

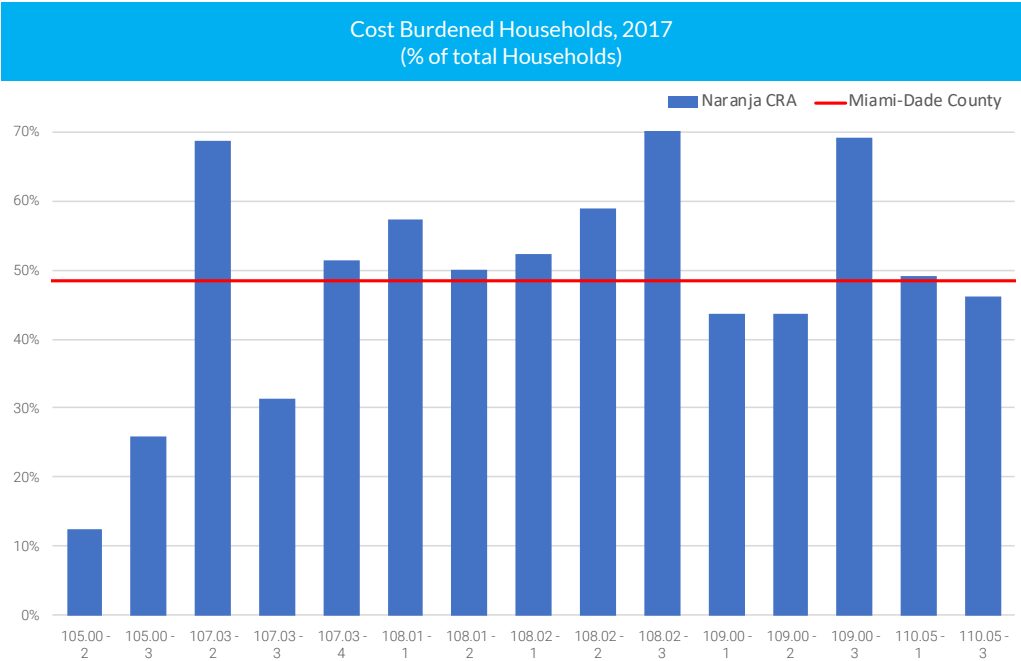


Source: 2009-2013, 2013-2017 American Community Survey 5-Year Estimates
All Dollar values are in CPI adjusted 2017 Dollars

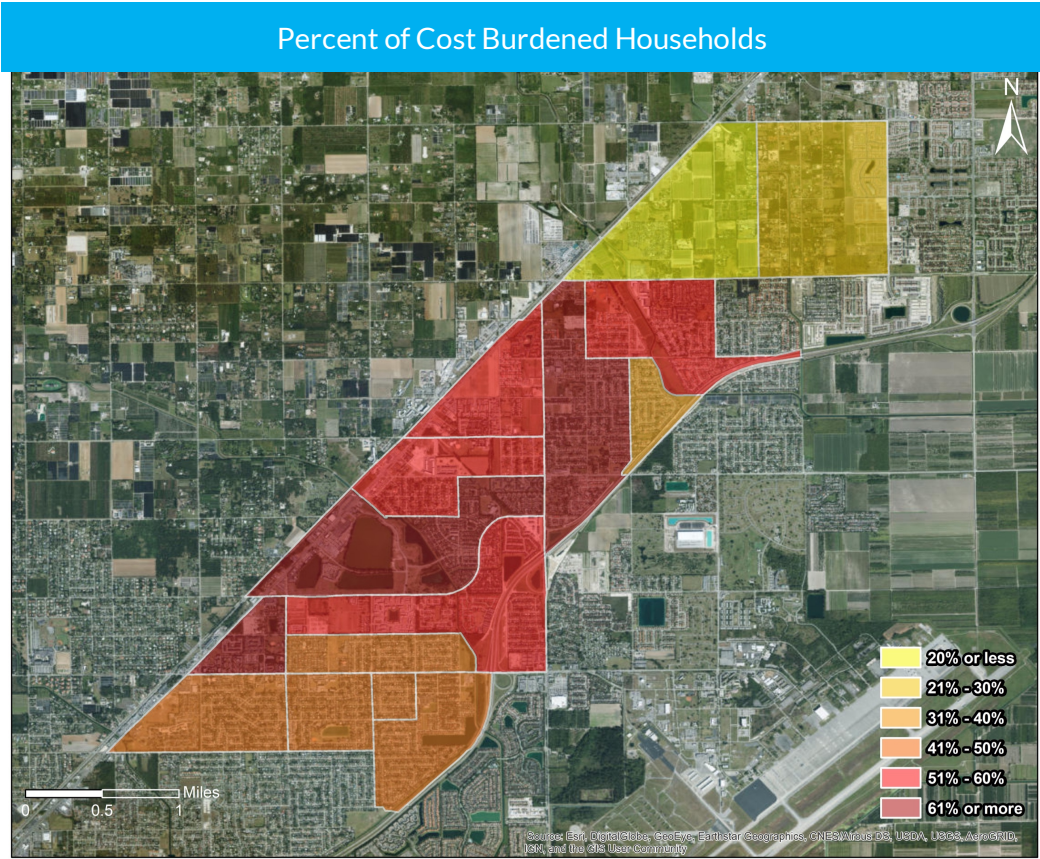
Housing Cost Burden

The last measure of affordability is **Cost Burden** — a household is considered cost burdened if it spends more than 30 percent of its total income on housing expenses. 48 percent of all households (owner and renter) in Miami-Dade are cost burdened, the second highest in the US of all counties.

The percentage of cost burdened households in nine of the fifteen CRA block group exceeds the County cost burden rate, and in three are close to 70 percent. High cost burden is most predominant through the center neighborhoods of the CRA, including its neighborhoods with the highest numbers of single-family homes.



Source: 2009-2013, 2013-2017 American Community Survey 5-Year Estimates
All Dollar values are in CPI adjusted 2017 Dollars

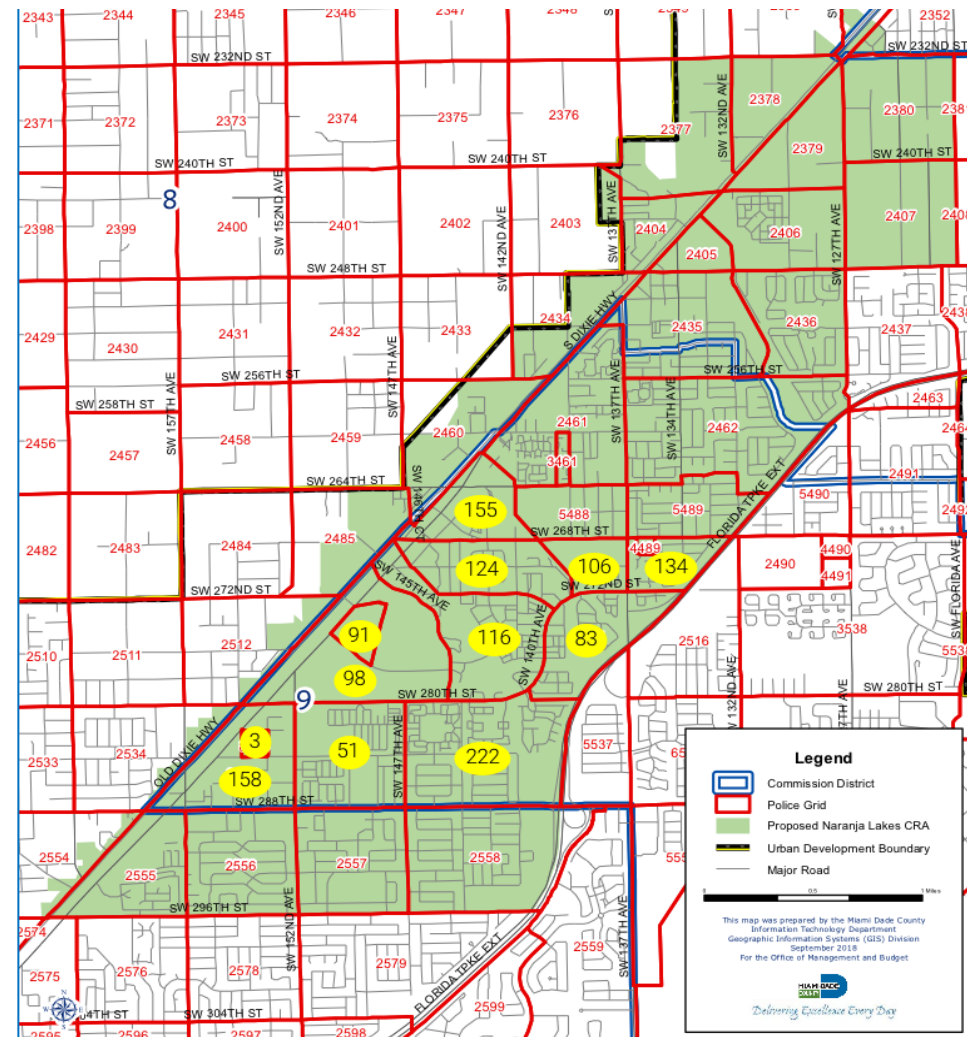


Safety & Security

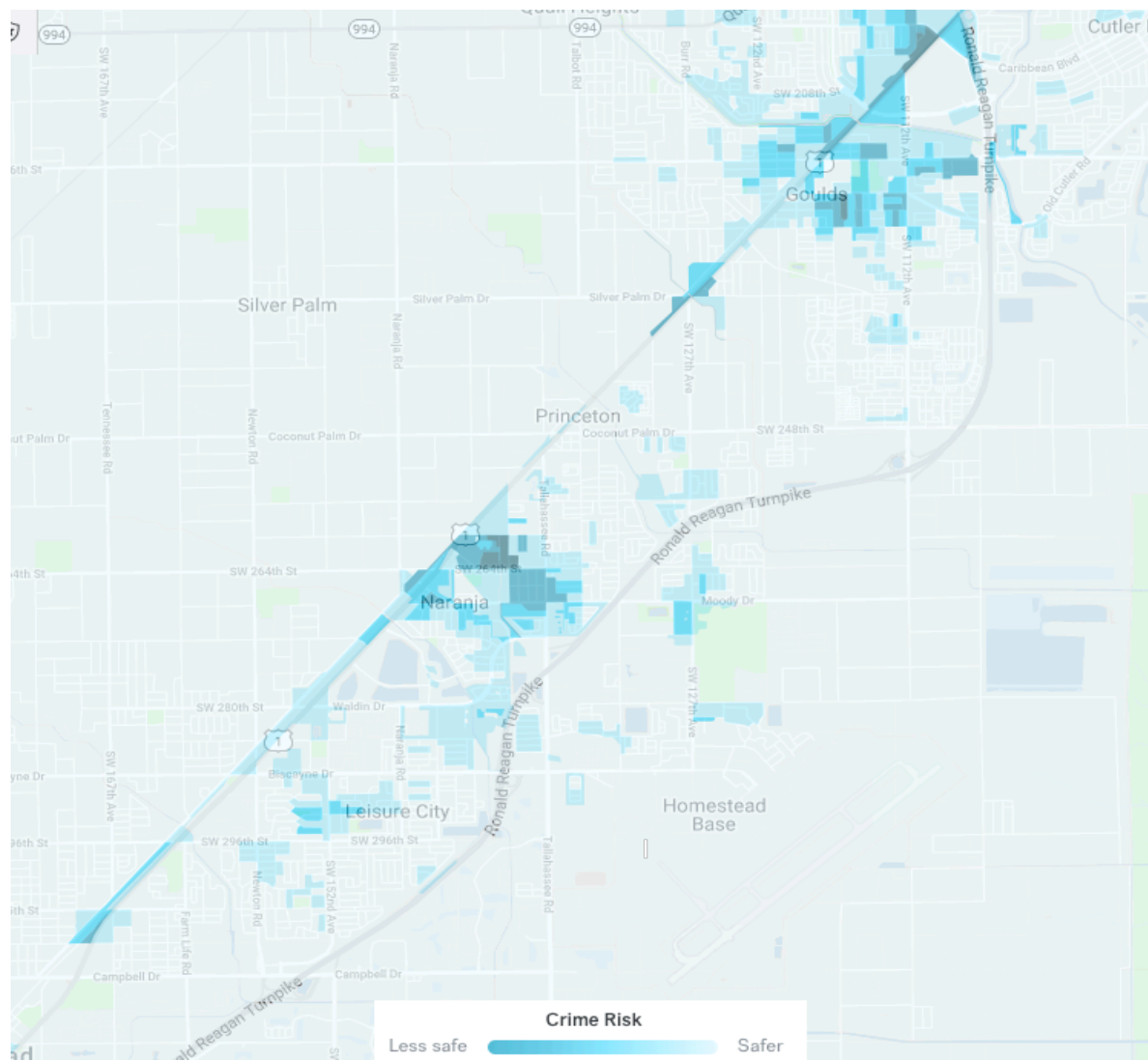
Crime throughout the CRA has deservedly received significant attention. The CRA's overall crime rate per 1,00 persons is higher than the County as a whole. Type 1 Crimes, as defined by the FBI, includes homicide offenses, forcible sex offenses, robbery, aggravated assaults, burglary, larceny, and motor vehicle theft, and represent the crimes police agencies seek to prevent more than any others. Using the County Police Department's crime data, Type 1 crime incidents in the CRA occur in a clear geographic pattern, with the following characteristics:

- The neighborhoods with the highest annual crime rates coincide with the CRA's poorest neighborhoods;
- High crime rates intersect with the CRA's neighborhoods with the highest unemployment rates;
- The location of Type 1 crimes do occur along the CRA's US-1 Commercial corridor, but have higher rates of incident in the CRA's residential areas; and
- The highest number of crimes are concentrated in the Naranja portion of the CRA, focused within a .6-mile radius of the intersection of Moody Drive (SW 286th St) and SW 139th Avenue.

Type 1 Crime Reported Incidents, 2018



CRA Type 1 Crime Incident Heat Map

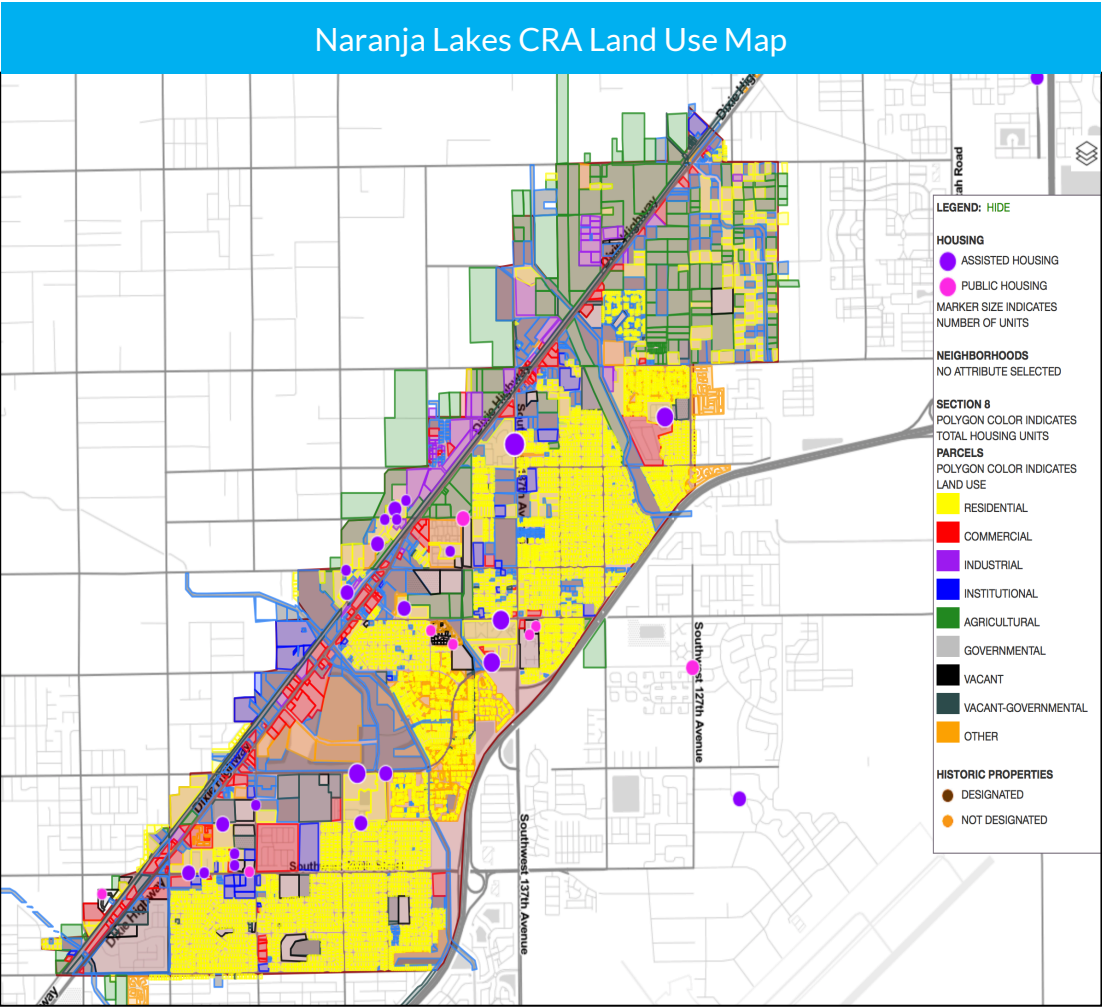


Land Use, Real Estate & Transportation Demand

Land Availability – How Much More Can be Built?

The availability of land drives the pricing and location of new development. Miami-Dade’s inventory of vacant land inside the Urban Development Boundary is shrinking. Parcels throughout South Florida larger than 4 or 5 acres are at a premium, and development is quickly shifting to infill development, higher densities, and smaller building footprints. Prices for undeveloped land are increasing quarterly, and according to market reports, retail and commercial developers are increasingly competing with multifamily residential developers for land.

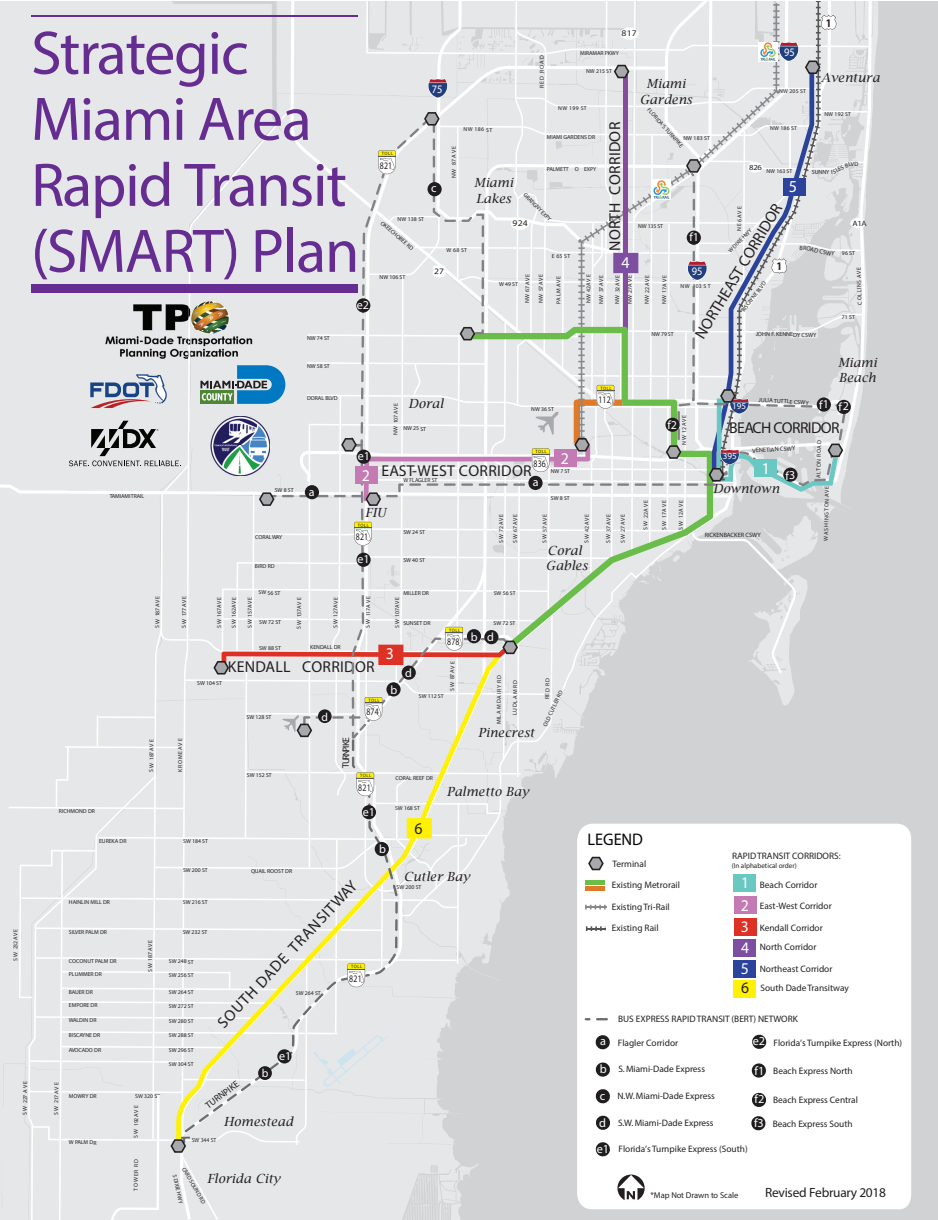
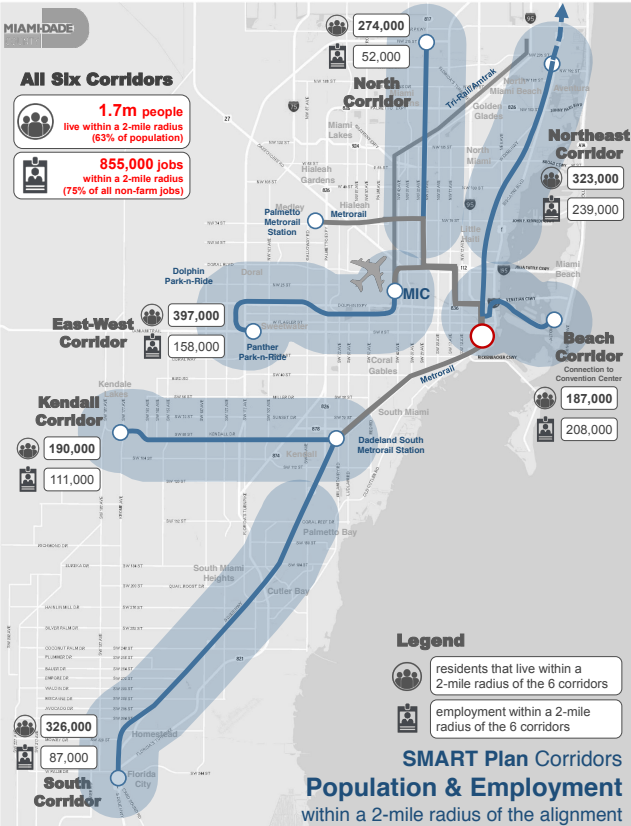
According to the Miami-Dade County Assessor database, there are 696 acres of undeveloped land zoned or approved for residential, commercial, or industrial use within the CRA. That translates to 30 Million square feet of new development at a 1:1 Floor area ratio, or 151.5 Million square feet at a 5:1 Floor area ratio. Development of the undeveloped approved residential property in the CRA, including Vacant Governmental Property, translates to between 19,000 to 98,000 new 1,000 square foot housing units. Development of the undeveloped commercial and industrial, approved property, including vacant governmental, as office parks translates to between 26,000 and 133,00 new jobs.



The County’s Future Transportation Plans

Miami-Dade County, in concert with the Miami-Dade Transportation Planning Organization (TPO), have developed a long-range plan for transit expansion throughout the County. The **Strategic Area Rapid Transit (SMART) Plan**, proposes the development of six new rail transit corridors to better connect workers with job sites, remove cars from the area’s roadways, reduce congestions, and reduce carbon emissions.

The **South Dade Transitway**, currently a dedicated express busway running parallel to the US-1 Highway, has been identified for future rail development. The SMART plan also includes up-zoning along each corridor, allowing up to 150 dwelling units per acre on properties within ½ mile of each segment. Major redevelopment is being considered at selected nodes along the South Dade Corridor.



Other Crucial Real Estate Demand Trends

Changes in Housing Preference

The two largest components of the nation’s age demographic — millennials (ages 16 to 34), and baby-boomers (ages 54 to 70), are significantly driving changes in demand for different types and locations of housing. Interestingly, both age groups are seeking housing with similar characteristics including:

- Rental, rather than owner housing, even for single family homes;
- Smaller size housing units, and multi-family housing;
- Neighborhoods in close proximity to shopping, conveniences, recreation and entertainment;
- Millennials are the first generation since the invention of the automobile to drive less miles than their parents, and increasingly do not own cars at all. Both age groups are seeking walkable neighborhoods locations requiring less drive time to work, and in proximity (less than 1/2 mile) to mass transit and bicycles; and
- More outdoor amenities, including garden plots, walking/jogging trails, parks, outdoor pools, and local drug/convenience stores.

Aging in Place

America is growing older at an unprecedented rate. Today, there are more than 35 million Americans are age 65 and older, and that number is expected to rise to nearly 55 million by the year 2020 — a 65 percent increase. Most important, however, is the fact that these older adults are overwhelmingly choosing to stay in their own homes and communities as they age. Just last year, AARP surveyed Americans over 50 and discovered that 89 percent wanted to stay in their own homes as long as possible. The “graying” of the County’s population, especially as baby-boomers enter retirement, will have significant impacts on both the demand and supply of housing. Developing a mix of housing units to address the housing choices and needs of baby boomers will need to be a critical part of future housing policy strategies.

Small Business Creation

Housing plays an important role in small business growth, employment and transportation congestion. According to the US Small Business Administration, 65 percent of all new businesses are created in the home, and many remain there even after hiring employees. **Non-**

Employer Businesses — businesses with only one employee, the owner and principal, who typically work as independent contractors — represent almost 85 percent of the business establishments and 33 percent of all employment in the County, the highest percentage of any County in the nation.

Workshifting and the Changing Geography of Work

The development of alternative office space and work arrangements, or **workshifting**, is a growing trend nationally and in the County. Workshifting is increasingly being adopted by employers to save costs and increase productivity, and being driven by the growth of small businesses and single proprietor businesses. Workshifting is also being adopted in many regions as an effective, low cost transportation congestion solution. Workshifting is comprised of two strategies: 1) Alternative office space, and 2) Telecommuting.

Alternative Office Space

Employers and sole proprietor businesses are using shared office space and satellite offices closer to workers homes. According to Yardi Matrix, Miami-Dade County has 59 co-working locations totaling nearly 1.4 Million square feet of space. At 2.7 percent of all office space, Miami-Dade has the highest percentage of co-working space of 200 metro areas studied, including New York, Los Angeles, and San Francisco.

Demand is driven by the County’s large number of small business and start-ups. Co-working is simpler and less costly to develop than traditional office space, allowing a wider range of developers and owners to compete in this segment. ***This creates opportunities for locations in neighborhoods with mixed-use amenities to compete for new satellite office space.***

The Growth of Telecommuting

Telecommuting is an established and growing strategy to save costs, improve worker productivity, and reduce road congestion. ***The growth of telecommuting promises to re-shape the we work, and increasingly transform homes from just places to live into places to live and work.*** The importance of telecommuting cannot be underestimated:

- A 2017 Gallup survey found that 43 percent of workers now work at least one day per week from home. Regular telecommuting grew 115% in the past decade, nearly 10 times faster than the rest of the workforce;

- According to the US Bureau of Labor Statistics *American time Use Study*, 24 percent of all workers in the US do all or some of their work at home, up from 21 percent in 2006. The percentage varies widely by occupation. 37.8 percent of workers employed in **Management, business, and financial operations occupations** report working all or some part of their workweek from home;
- Telecommuters are, on average, more highly educated than other employees. Approximately 53% have at least a bachelor’s degree, compared to 37% of non-telecommuters. The average annual income for most telecommuters is \$4,000 higher than that of non- telecommuters. The percent of women and men who telecommute is about equal;
- Telecommuting is most common in Management occupations, but employees in Computer, Mathematical, and Military occupations work at home much more frequently than their peers. While the Professional, Scientific, and Technical Services industry has the highest percentage of telecommuters relative to its share of the workforce, the Management of Companies and Agriculture industries top the list because of an administrative job component;
- Half of telecommuters are 45 years of age or older, compared to just 41% of the overall workforce;
- Telecommuting is increasingly offered as part of employment packages. 46 percent of corporate leaders rank telecommuting as second only to compensation as the best way to attract talent; and
- In more than half of the top U.S. metros, telecommuting exceeds public transportation as the commute option of choice. It has grown far faster than any other commute mode.

| Percent of workers doing some or all of their work on their main job at home | | | | | | | | | | |
|--|-------|--|--------------------------------------|---------------------|-------------------------------|---|---|---|------------------------|--|
| Year | Total | Management, business, and financial operations occupations | Professional and related occupations | Service occupations | Sales and related occupations | Office and administrative support occupations | Construction and extraction occupations | Installation, maintenance, and repair occupations | Production occupations | Transportation and material moving occupations |
| 2006 | 21.1 | 32.3 | 33.2 | 12.1 | 20.3 | 8.2 | 14.5 | 10.9 | 3.8 | 6.1 |
| 2007 | 19.9 | 32.3 | 30.6 | 11.3 | 20.7 | 7.8 | 10.6 | 7.3 | 4.0 | 6.0 |
| 2008 | 21.1 | 29.8 | 32.1 | 13.0 | 24.3 | 12.3 | 5.5 | 9.2 | 5.5 | 7.3 |
| 2009 | 23.6 | 35.5 | 38.3 | 13.7 | 21.7 | 9.0 | 11.4 | 12.0 | 5.2 | 6.6 |
| 2010 | 23.6 | 32.9 | 32.9 | 15.0 | 26.6 | 10.6 | 11.6 | 12.7 | 6.3 | 10.3 |
| 2011 | 21.3 | 34.2 | 33.5 | 9.5 | 20.0 | 12.8 | 10.1 | 11.3 | 5.2 | 5.2 |
| 2012 | 23.2 | 35.5 | 37.0 | 10.1 | 21.4 | 9.3 | 16.0 | 14.7 | 6.2 | 7.2 |
| 2013 | 22.9 | 35.1 | 34.8 | 11.0 | 21.4 | 11.1 | 17.0 | 14.8 | 7.9 | 6.2 |
| 2014 | 23.1 | 36.8 | 34.0 | 12.0 | 26.0 | 8.5 | 15.0 | 9.5 | 4.6 | 6.3 |
| 2015 | 24.1 | 37.8 | 34.6 | 10.5 | 22.1 | 11.2 | 16.2 | 9.6 | 5.5 | 7.7 |

Source: US Bureau of Labor Statistics American Time Use Study, 2017

Where Residents Work

Transportation demand, and congestion, is driven primarily by where residents live versus where they work. Although the CRA is served by two major highway segments and an express, dedicated busway connecting to the County metro-rail system, its commuter patterns are unsustainable over the long term. According to the US Census, approximately 14,694 employed residents live in the CRA in 2017. Unfortunately, according to the most recent data available, only 296 employed residents actually live and work in the CRA. **97.5 percent of the CRA’s employed works are employed outside the CRA, and just over 38 percent work in destinations north of the City of South Miami, including Miami, Kendall, Doral, and Fort Lauderdale. However, 21 percent of workers in the CRA work in occupations highly amenable to telecommuting.**

| Where CRA Residents Work | | |
|--------------------------|-------|-------|
| | Count | |
| Miami | 1,867 | 15.6% |
| Homestead | 789 | 6.6% |
| Kendall | 609 | 5.1% |
| Cutler Bay | 391 | 3.3% |
| Doral | 388 | 3.2% |
| Coral Gables | 374 | 3.1% |
| Three Lakes | 257 | 2.1% |
| Florida City | 239 | 2.0% |
| Princeton | 221 | 1.8% |
| Palmetto Bay Village | 199 | 1.7% |
| Hialeah | 191 | 1.6% |
| Fort Lauderdale | 179 | 1.5% |
| Leisure City | 165 | 1.4% |
| South Miami | 145 | 1.2% |
| South Miami Heights | 138 | 1.2% |
| Miami Beach | 132 | 1.1% |
| Naranja | 123 | 1.0% |
| Glenvar Heights | 107 | 0.9% |
| Pinecrest village, FL | 106 | 0.9% |
| The Hammocks | 105 | 0.9% |
| Sunset | 104 | 0.9% |
| Medley | 98 | 0.8% |
| Hollywood | 96 | 0.8% |
| University Park | 92 | 0.8% |
| North Key Largo | 86 | 0.7% |
| All Other Locations | 4,755 | 39.8% |

