

# CITY OF DORAL HOUSEHOLD SURVEY

## FINAL REPORT

October 24, 2011



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## EXECUTIVE SUMMARY

The Metropolitan Center at Florida International University conducted a telephone survey of 408 City of Doral households from October 2 through 23, 2011. The purpose of the survey was to provide estimates of household size, and to assess consumer expenditures and needs.

The survey results point to the general satisfaction of Doral residents with life in the City of Doral. The vast majority of Doral residents (95.9%) rated the quality of life within the City as good/excellent. As a result, the majority (96.4%) would also recommend the City of Doral as a place to live and work. A slightly smaller percentage, but still a significant majority (87.4%) see themselves continuing to live in Doral in three years.

Overall satisfaction with life in Doral is to a large extent influenced by the shopping and entertainment opportunities residents have in the city. The survey results indicate that most residents conduct their shopping activities in Doral. Only one resident does not do grocery shopping in Doral and 6.7% indicated the same about retail shopping. Only 5.4% do not eat out at any of the food establishments in Doral. However, one in five respondents (19.2%) indicated they do not engage in any recreational or entertainment activities in the city.

The survey also included questions on the types of stores which residents frequent and the driving distance to them. The majority of Doral residents do most of their grocery shopping at Publix (90.6%) and Winn-Dixie (57.8%) but a significant percentage also mentioned Sedano's (27.5%). The grocery stores seem to be within a reasonable driving distance for Doral residents as evident from the fact that the overwhelming majority drive less than 3 miles for groceries.

Doral's residents shop at a variety of retail stores within a five-mile driving distance. The department stores most residents prefer are either discount stores (Walmart, Kmart, Target) or upscale stores such as Macy's. The large percentage of residents who shop at upscale stores can be explained by the high percentage of residents in the sample who reported income of over \$100,000 (21.8%).

Among the specialty stores Doral residents visit, the most popular are Warehouse clubs (Costco, Sam's Club), where 74.3% go to, and Electronics stores, frequented by 65.6% of residents. Approximately a third of the residents who go to Warehouse club stores (33.9%) drive over five miles to them.

Most respondents seem to be in relatively close proximity to a variety of food establishments and do not drive long distances to reach them. Most popular among the food establishments for Doral residents are ethnic restaurants visited by 77.5% of respondents, followed by fast food places (60.9%), and seafood places (58.2%).

Doral residents expressed satisfaction with the variety of shopping options in Doral or in close proximity to the city. A large percentage (82.1%) agree that there are enough places for eating out in Doral and also believe they can buy everything they need for their family in the city (79.3%). However, 37.3% do not believe there are enough entertainment and recreational opportunities in Doral.

The City of Doral received the approval of the majority of residents across most characteristics which are generally related to shopping, including physical appearance of shopping district (86.1%), quality of goods and services (85.7%), and sense of comfort and safety (85.1%). The largest percentages of residents who expressed dissatisfaction were in reference to ease of access for pedestrians (17.5%) and the prices of goods and services (11.9%).

In order to encourage the residents of Doral to shop more, the business establishments need to focus on some of the factors that seem to motivate Doral's residents. The top motivating factor the respondents pointed to was lower prices (63.1%), followed by greater variety of products (46.0%) and better customer service (41.4%). Storefront improvements is a factor with the least motivating power as it is important for only 13.4% of residents in their shopping decisions.

In terms of the types of business establishments they would like to see in Doral, the most often mentioned establishments were book stores (26.7%), night clubs (24.8%), and restaurants (20.8%). However, there are some significant differences across gender and age groups with regards to preferred business establishments. For example, the more male respondents prefer bars and night clubs than female respondents. Also, Doral residents in the younger age groups prefer business establishments which provide an entertainment value (bars and night clubs), while those in the most advanced age group lean towards establishments which allow for more sedate activities (book stores).

In terms of the retail establishments in their city, most respondents (74.9%) would like to see a mix of local and national retailers. A larger percentage of White/Anglo respondents (89.5%) would like to see a mix of locally owned and national retailers than Hispanic respondents (71.4%). Conversely, more Hispanics expressed preference for locally-owned retailers (17.5%) than White non-Hispanics (5.3%). Doral resident preferences for the types of retailers they want in their city is also related to age. A higher percentage of younger residents would prefer a mix of local and national retailers, while more residents over 65 prefer locally-owned retailers.

The survey results referenced above are presented in more detail in the report that follows. Where the differences in opinion among different demographic groups are statistically significant, i.e. the difference is more than five percent, the results are also discussed for that various groups.

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## METHODOLOGY

The 404 survey responses were collected from a random sample of City of Doral households. The respondents were adult household members who were informed at the survey start of the general purpose of the survey to understand household shopping preferences. The survey instrument was designed by the FIU Metropolitan Center, in collaboration with Social Compact and the City of Doral. The questionnaire included general quality of life questions, as well as specific questions on the shopping preferences, travel times and expenditures of the households surveyed. The survey also collected demographic information from the participating respondents.

The survey participants were obtained from a list of approximately 3,500 Doral households. Responses were solicited by expert interviewers fluent in English and Spanish, and responses were collected in the respondent's language of choice.

The survey was implemented over a three week period, from October 3 to October 23, 2011. Survey calls were made in the evening on workdays, as well as on Sundays, from noon until 7 pm, excluding holidays.

The 404 survey responses provide for a 95% confidence interval and a +/- 5% margin of error.

It should be noted that the survey was conducted over the phone with the adult householder who answered the phone. All demographic questions were asked at the end of the survey, and responses were collected and analyzed regardless of demographic characteristics. Moreover, calls were only made to landline phones and this method of response collection over samples people of higher age, income and educational attainment. By comparison, cell phone only users are younger, less affluent, less likely to be married or to own their home.

The survey method selection was based on comparison of the costs and benefits of the relatively inexpensive phone methodology vs. in-person, online or cell phone survey implementation. In terms of cost, the four methods of survey data collection can be ranked, from highest to lowest, as in-person, cell phone, landline phone, and online. While most affordable, online surveys are also the least representative as they require the respondent to have an email and access to a computer. Online survey respondents are usually well educated, relatively affluent, and generally in the younger age groups. Cell phone survey implementation is difficult and expensive because of the lower response rate and less willingness of cell phone users to complete a survey while using their plan or prepaid minutes, even if incentives are provided. In person surveys (door-to-door) are very labor intensive but have a good response rate and can be more representative than others.

## OVERALL SURVEY RESULTS

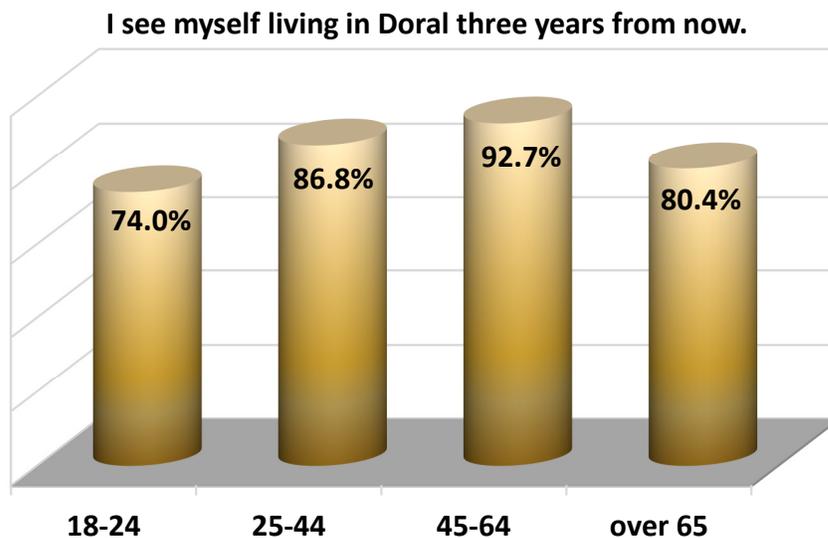
### DEMOGRAPHIC INFORMATION

- ❖ In the survey sample, 150 respondents were male (37.1%) while 254 were female (62.9%). Thus, females were slightly overrepresented since the 2010 U.S. Census shows 48.1% male residents and 51.9% female residents in Doral.
- ❖ According to the U.S. Census, 6.1% of Doral's residents in 2010 were 65 years or older. Approximately 12.6% of the respondents in the survey sample were 65 years or older. The age distribution is as follows:
  - ◆ 50 (12.4%) between 18 and 24
  - ◆ 29 (7.2%) between 25 and 34
  - ◆ 92 (22.8%) between 35 and 44
  - ◆ 119 (29.5%) between 45 and 54
  - ◆ 60 (14.9%) between 55 and 64
  - ◆ 51 (12.6%) over 65
- ❖ According to the 2010 United States Census, 14.6% of Doral's residents were White, non-Hispanic while 1.6% were Black and 79.5% were Hispanic regardless of race. The survey sample closely followed the Census counts. Of the 404 residents surveyed,
  - ◆ 316 (78.4%) were Latino/Hispanic
  - ◆ 57 (14.1%) Anglo
  - ◆ 5 (1.2%) African-American
  - ◆ 15 (3.7%) were Asian
  - ◆ 21 (5.4%) Other
- ❖ The survey sample also closely followed the distribution of residents by educational attainment. According to the 2005-2009 American Community Survey 5-year estimates, 65.9% of Doral residents had at least a college degree. In the sample, 246 (60.9%) of the survey respondents had at least a college degree. The distribution is as follows,
  - ◆ 5 (1.2%) had less than high school diploma
  - ◆ 79 (19.6%) had high school diploma or GED
  - ◆ 52 (12.9%) had some college
  - ◆ 86 (21.3%) were college graduates
  - ◆ 160 (39.6%) had a graduate degree
- ❖ The household size of the surveyed residents was 3.43, larger than the 3.00 household size reported by the 2010 U.S. Census. The distribution of households by number of persons in the household is as follows:
  - ◆ 23.8% of respondents reported their households consist of one or two persons
  - ◆ 26.7% were 3-person households
  - ◆ 47.8% were households with four or more persons
- ❖ Almost a third of the respondents (29.2%) refused to provide their household income. The distribution of respondents who provided their household income is as follows:
  - ◆ Under \$20,000 - 4.7%
  - ◆ \$20-30,000 - 3.7%
  - ◆ \$30-40,000 - 7.9%
  - ◆ \$40-50,000 - 5.2%
  - ◆ \$50-60,000 - 4.7%
  - ◆ \$60-70,000 - 4.0%
  - ◆ \$70-80,000 - 6.9%
  - ◆ \$80-90,000 - 3.5%
  - ◆ \$90-100,000 - 8.4%
  - ◆ Over \$100,000 - 21.8%

- ❖ In terms of language,
  - ◆ 272 (67.3%) of surveys were conducted in English.
  - ◆ 132 (32.7%) were conducted in Spanish.
- ❖ Over three-fourths of respondents had lived in the City of Doral over five years. The distribution is as follows:
  - ◆ 15 (3.7%) less than 1 year
  - ◆ 40 (9.9%) 1 to 3 years
  - ◆ 32 (7.9%) 3 to 5 years
  - ◆ 317 (78.5%) over 5 years
- ❖ A significant percentage of the respondents (44.5%) indicated that their workplace is located within the City of Doral.

**SATISFACTION WITH QUALITY OF LIFE/GENERAL ISSUES**

- ❖ The vast majority of Doral residents across all different demographic groups (388 or 96.0%) rated the quality of life within the City as good/excellent.
  - ◆ A higher percentage of respondents who have lived in Doral longer than five years rated the quality of life in the city as excellent or good (97.1%) than those who have resided in Doral for fewer than five years (92.0%).
- ❖ Most residents (87.1%) see themselves continuing to live in Doral in three years.
  - ◆ A smaller percentage of Doral residents in the youngest age group (18-24) and those of most advanced age (over 65) see themselves living in Doral in three years.



- ❖ The vast majority (96.5%) would also recommend the City of Doral as a place to live and work.
  - ◆ While all residents who indicated income under \$30,000 would recommend the City of Doral as a place to live and work, 93.2% of those with income over \$100,000 indicated the same.

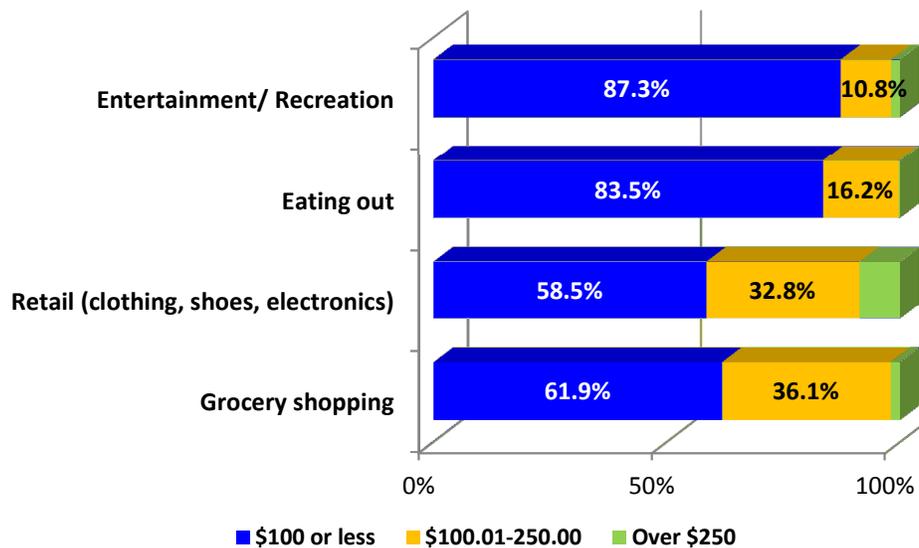
## RECREATIONAL AND SHOPPING ACTIVITIES

Survey respondents were asked questions on the shopping and recreational activities they engage in Doral and in general. These questions gathered information also on the distance residents drive and how much they spend. The results are detailed in the following bullet points and key differences among demographic groups are analyzed.

- ❖ The respondents were asked to indicate the frequency of conducting several activities in Doral. Only one respondent reported not doing any grocery shopping in Doral, while 6.7% said the same with regards to retail shopping, 5.4% regarding eating out in the city, and 19.2% with regards to general recreation and entertainment. The full results are presented in the following table.

	At least once a week	Once or twice a month	At least once a year	Do not do in Doral
<i>Grocery shopping</i>	92.8%	6.9%	-	0.2%
<i>Retail (clothing, shoes, electronics)</i>	30.7%	47.1%	15.6%	6.7%
<i>Eating out</i>	59.9%	27.2%	7.4%	5.4%
<i>Entertainment/ Recreation</i>	44.1%	24.8%	11.9%	19.2%
<i>Use Doral Trolley</i>	8.8%	1.8%	4.8%	84.6%

- ❖ The respondents who indicated they do not eat out in Doral were asked on the reasons for their decision and the most frequent responses were that they do not like the restaurants, generally because they considered them of the fast food variety.
- ❖ The Doral residents surveyed also answered questions on how much they spend for various activities per occasion. The results are presented in the chart below. The majority of them tend to spend under \$100 for grocery and retail shopping as well as eating out and recreation.



- ❖ The third substantive question on the shopping habits of Doral residents referred to the distance they drive for the stores at which they shop frequently. The types of location to which Doral residents were asked to estimate the driving distance included grocery, department, and specialty stores, as well as restaurants. The results for each group are presented below

**GROCERY SHOPPING**

- ◆ The majority of respondents shop at Publix (90.6%) and Winn-Dixie (52.0%). Some respondents indicated they also do their grocery shopping at Sedano’s (27.5%), Fresh Market (7.4%), and Whole Foods (11.6%). A small percentage indicated Wal-Mart and Costco as their grocery shopping destinations.
- ◆ In terms of the driving distance, most residents do not seem to drive far to do their grocery shopping. The chart below shows the distribution of respondents who drive at the indicated distance to the specific store.

Grocery Stores	Less than 1 mile	1-3 miles	3-5 miles	Over 5 miles	Do not shop in Doral
<i>Publix</i>	53.7%	29.2%	5.9%	0.7%	10.4%
<i>Winn Dixie</i>	28.2%	20.3%	2.2%	1.2%	48.0%
<i>Fresh Market</i>	0.5%	0.2%	0.5%	6.2%	92.6%
<i>Whole Foods</i>	0.5%	1.0%	-	10.1%	88.4%
<i>Other Grocery</i>	14.1%	13.1%	3.2%	2.2%	67.3%

**DEPARTMENT STORE SHOPPING**

- ◆ For their retail shopping most Doral residents visit a variety of stores. Interestingly, most shop both at upscale department stores such as Macy’s and Dillard’s (79.7%) as well as discount stores such as Wal-Mart, Kmart and Target (80.4%). In addition, 61.6% indicated they also go to mid-scale retailers such as JC Penney and Kohl’s while 49.8% do retail shopping at off-price retailers such as TJ Maxx, Marshall’s and Ross.
- ◆ Doral residents seem to have easy access to a variety of stores as demonstrated by the relatively small distance they can drive to reach their retailer of choice. The chart below shows that for the majority of residents, the department stores they visit are within five miles driving distance.

Department Stores	Less than 1 mile	1-3 miles	3-5 miles	Over 5 miles	Do not shop in Doral
<i>Upscale (Macy’s, Dillard’s)</i>	4.5%	36.6%	30.2%	8.4%	20.3%
<i>Midscale (JC Penney, Kohl’s)</i>	2.0%	27.2%	24.8%	7.7%	38.4%
<i>Discount (Walmart, Kmart, Target)</i>	2.5%	33.9%	28.7%	15.3%	19.6%
<i>Off-price Retail (TJ Maxx, Ross, Bealls)</i>	1.5%	23.0%	15.8%	9.4%	50.2%
<i>Other Department Store</i>	0.5%	1.5%	0.7%	0.5%	96.8%

### SPECIALTY STORE SHOPPING

- ◆ Among the specialty stores which Doral residents go to, warehouse clubs such as Costco, BJ's and Sam's Club seem to be visited by most residents. Only 25.7% indicated they do not shop at warehouse clubs, while 34.4% indicated the same of electronics stores, 58.7% of toy stores, 61.6% of furniture stores and 70.5% of pet stores.
- ◆ Many Doral shoppers who visit Warehouse Clubs have to drive more than 5 miles, while for most other specialty stores they drive less.
- ◆ Other specialty stores the respondents mentioned included Brandsmart, Home Depot, Tiger Direct, Best Buy and Apple store.

Specialty Stores	Less than 1 mile	1-3 miles	3-5 miles	Over 5 miles	Do not shop in Doral
<i>Toy</i>	4.7%	22.0%	10.6%	4.0%	58.7%
<i>Furniture</i>	2.0%	12.6%	10.4%	13.4%	61.6%
<i>Electronics</i>	2.7%	35.4%	19.1%	8.4%	34.4%
<i>Pet</i>	2.5%	15.6%	9.2%	2.2%	70.5%
<i>Warehouse club</i>	1.7%	14.4%	24.3%	33.9%	25.7%
<i>Other Specialty Store</i>		26.7%	20.0%	43.3%	10.0%

### RESTAURANT

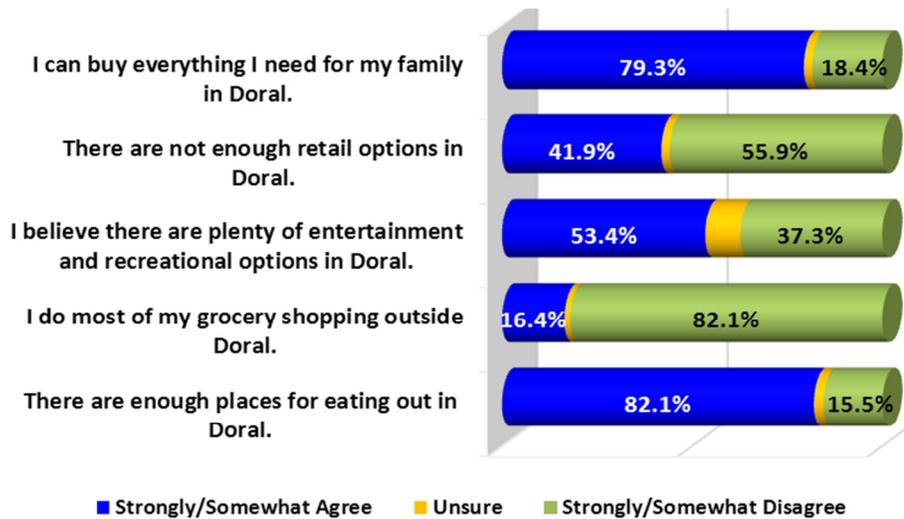
- ◆ There is a good mix of various restaurants and eateries in the City of Doral or in very close proximity to it as evident from the types of eating places Doral residents visit and the reasonable distances they need to drive to reach them. The most popular food establishments among Doral residents are ethnic restaurants visited by 77.5% of respondents, followed by fast food places (60.9%), and seafood places (58.2%).
- ◆ The food establishments which most residents do **not** visit are Buffets (63.6%) and Café/Bistro-style eateries (58.4%).
- ◆ Most respondents seem to be in relatively close proximity to a variety of food establishments and do not drive long distances to reach them.

Restaurant/Eatery Categories	Less than 1 mile	1-3 miles	3-5 miles	Over 5 miles	Do not go in Doral
<i>Fast Food</i>	28.0%	27.7%	4.7%	0.5%	39.1%
<i>Seafood</i>	12.6%	28.7%	10.6%	6.2%	41.8%
<i>Ethnic</i>	14.9%	36.4%	16.6%	9.7%	22.5%
<i>Café/Bistro-style</i>	11.9%	20.3%	6.9%	2.5%	58.4%
<i>Casual (Chili's, Hooters)</i>	7.4%	18.6%	23.8%	5.0%	45.3%
<i>Buffet</i>	4.0%	13.6%	11.6%	7.2%	63.6%
<i>Diner</i>	11.4%	20.3%	10.1%	4.2%	54.0%
<i>Bar and Grill</i>	6.7%	19.3%	12.9%	7.4%	53.7%
<i>Other Restaurant</i>	2.5%	2.7%	1.5%	1.0%	92.3%

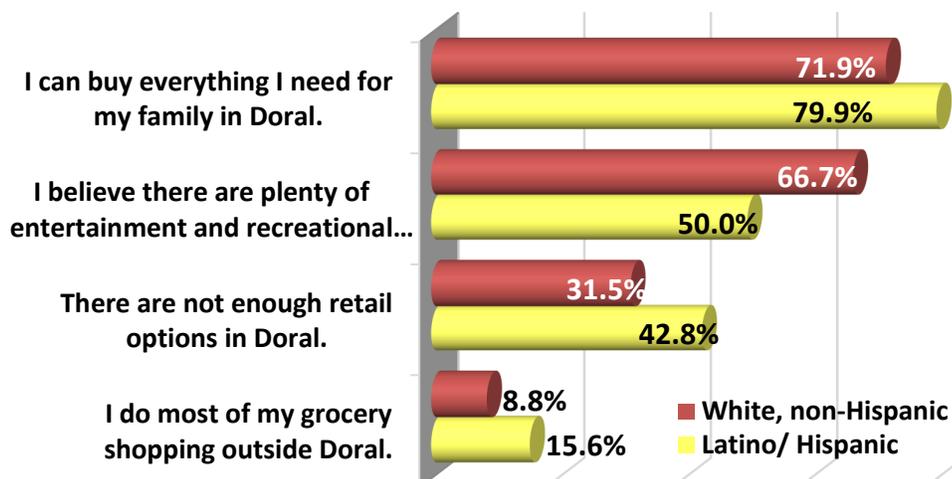
## GENERAL VIEWS ON SHOPPING AND RECREATIONAL OPPORTUNITIES IN DORAL

In order to understand residents' opinions of the current options for shopping and recreation in the city and their preferences for additional options in these categories, the survey included general questions which measured their attitudes in those respects.

- ❖ First, the residents were asked to assess the sufficiency of options in various categories. The chart below shows that most residents find the options they have for grocery shopping and for eating out satisfactory. However, a significant percentage (41.9%) agreed with the statement that there are not enough retail options in Doral. Additionally over one third (37.3%) seem to believe there are not enough entertainment and recreational options in Doral.



- ❖ A larger percentage of female respondents (45.0%) agreed with the assertion that there are not enough retail option in Doral than male respondents (36.7%).
- ◆ The analysis shows some significant difference between Latino/Hispanic respondents and White, non-Hispanic respondents. For example, while 15.6% of Latino/Hispanics indicated they do most of their grocery shopping outside Doral, only 8.8% of White, non-Hispanics indicated the same. Additional results are presented in the chart below.

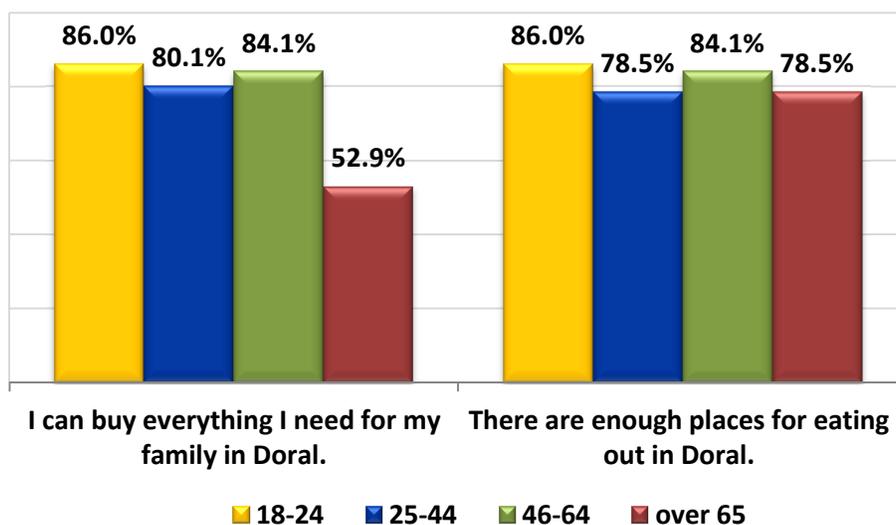


- ❖ There are some significant differences in the respondents’ assessment of the different shopping and entertainment options they have in Doral within the different household income groups. (See Table below)
  - ◆ While 26.4% of respondents in the “Under \$30,000” income group seem to do most of their shopping in Doral, only 6.8% of those in the “Over \$100,000” income group indicated the same.
  - ◆ A larger percentage of lower income respondents seem to believe there are not enough retail options in Doral, than high income respondents.
  - ◆ A smaller percentage of respondents in the highest income bracket agreed that there are enough places for eating out in Doral than respondents in the lowest income bracket.

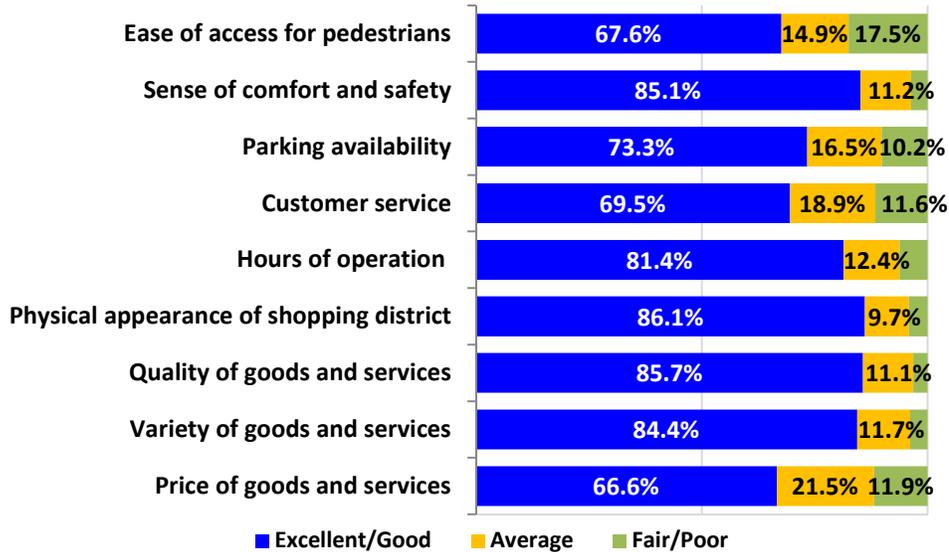
Agree/Somewhat Agree	Under \$30K	\$30-60K	\$60-100K	Over \$100K
I do most of my grocery shopping outside Doral.	<b>26.4%</b>	21.5%	17.4%	<b>6.8%</b>
There are not enough retail options in Doral.	<b>67.6%</b>	51.4%	24.2%	<b>46.6%</b>
I believe there are plenty of entertainment and recreational options in Doral.	55.9%	57.2%	57.6%	51.1%
I can buy everything I need for my family in Doral	76.5%	81.4%	83.7%	76.2%
There are enough places for eating out in Doral.	<b>92.2%</b>	84.3%	89.1%	<b>81.9%</b>

- ❖ The figure below shows the most significant differences of opinion among the different age groups.

- ◆ While 86.0% of respondents in the 18-24 group believe they can buy everything they need for their family in Doral, only 52.9% of those in the 65+ group indicated the same.

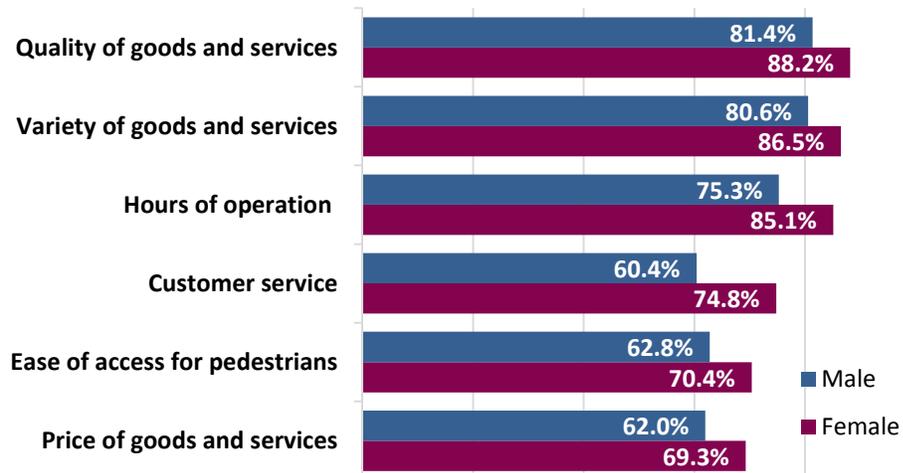


- ❖ The majority of respondents rated the City of Doral as excellent or good on a variety of features including physical appearance of shopping district, the quality of goods and services offered in the city’s business establishments, and sense of comfort and safety. The largest percentage of dissatisfied residents was in reference to the ease of access for pedestrians (17.5%), the price of goods and services (11.9%), and customer service (11.6%). The respondents’ attitudes for all characteristics are presented in the chart below.



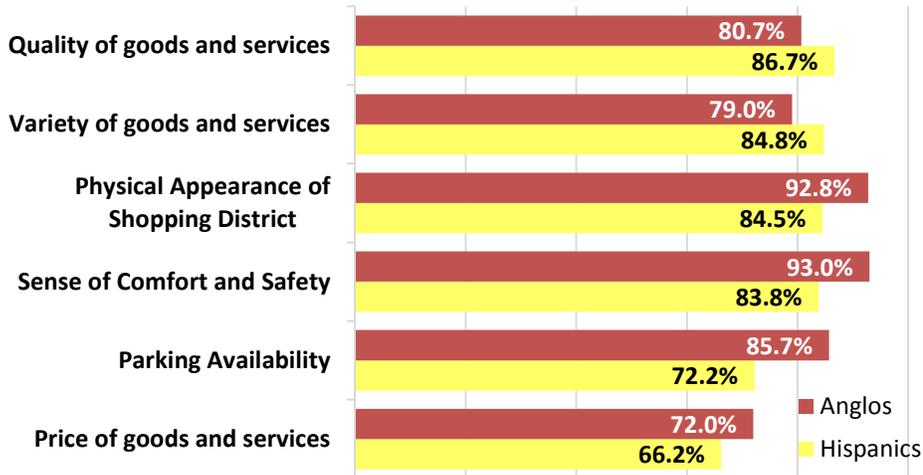
- ❖ While there were no significant differences between the male and female respondents with regards to the physical appearance of the shopping district, parking availability, and sense of comfort and safety, more women expressed satisfaction across the other categories.

Respondents who rated respective characteristic as "excellent or good"

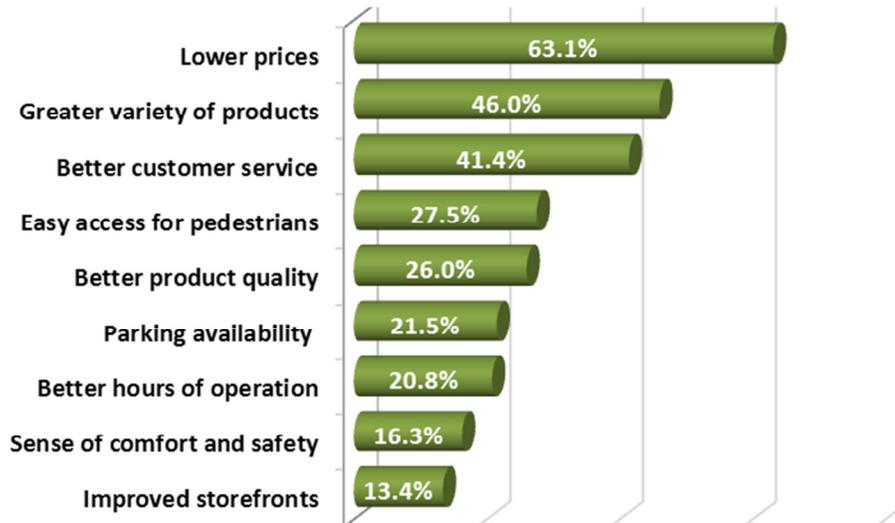


- ❖ There are also some significant differences in the satisfaction level of Hispanic and Non-Hispanic Doral residents with different characteristics of the city. While the largest percentage of White/Anglos consider the sense of comfort and safety in the city excellent or good, the quality of goods and services received a better approval rating from Hispanics.

**Respondents who rated respective characteristic as "excellent or good"**

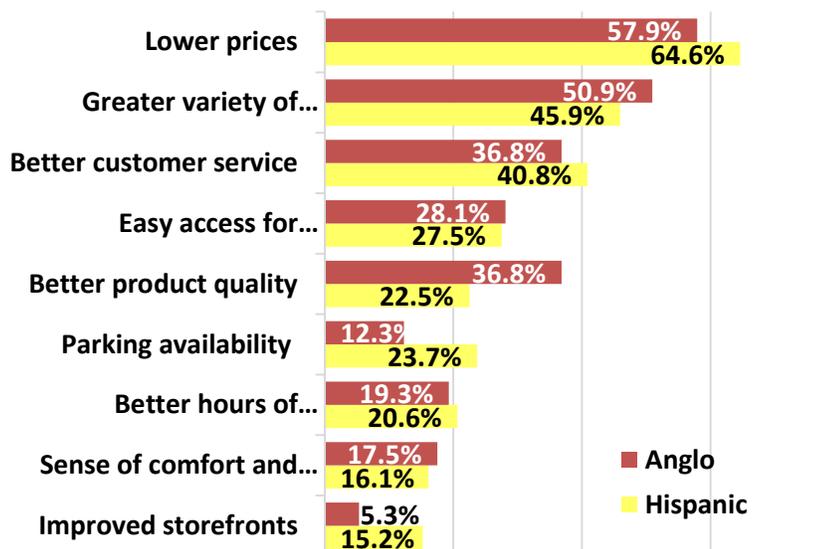


- ❖ The most motivating factors which would encourage Doral residents to shop more frequently in their neighborhood included lower prices (63.1%), greater variety of products (46.0%) and better customer service (41.1%).



- ◆ The only significant difference between female and male respondents was in the importance they assigned to improved storefronts and better hours of operation.
  - While 15.7% of women considered improved storefronts an important motivating factor, only 9.3% of males respondents indicated the same.
  - Conversely, while 24.7% of male respondents pointed out the importance of better hours of operation, only 18.5% of women indicated the same.
- ◆ Hispanic and Anglo respondents differ on the importance they ascribe to different incentives that would encourage them to shop more in Doral. For example, the percentage of Anglos for whom better product quality was important was much higher than the percentage of Hispanics.

**Motivating Factors for Shopping More in Doral**



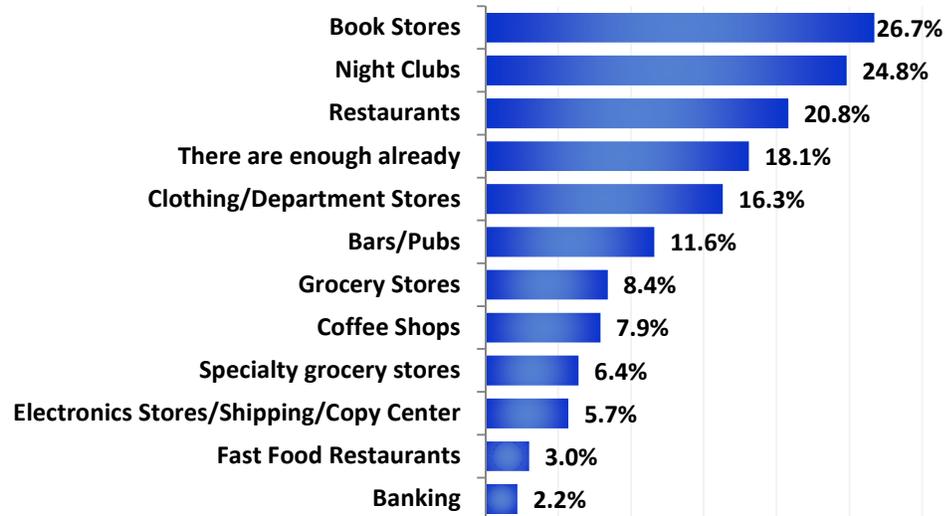
- ◆ Lower prices, greater variety of products and better customer service are considered the top three motivating factors for more shopping in Doral by residents in the lowest and highest income brackets (See table below).
  - Lower prices are a more important motivating factor for residents in the lower income categories.
  - Greater variety of products is more important for residents in the highest income category.

	Under \$30K	Over \$100K
Improved storefronts	2.9%	10.2%
Sense of comfort and safety	11.8%	20.5%
Better hours of operation	14.7%	29.5%
Parking availability	23.5%	20.5%
Better product quality	35.3%	29.5%
Easy access for pedestrians	17.6%	33.0%
Better customer service	41.2%	39.8%
Greater variety of products	44.1%	55.7%
Lower prices	73.5%	44.3%

- ◆ The results analysis shows that older residents do assign similar importance to some of the same motivating factors for shopping more in Doral as younger residents. However, there are some important differences.
  - Easy access for pedestrians and having a sense of comfort and safety are much more important for older residents than for younger.
  - Conversely, parking availability and more convenient hours of operation are more important for younger residents.

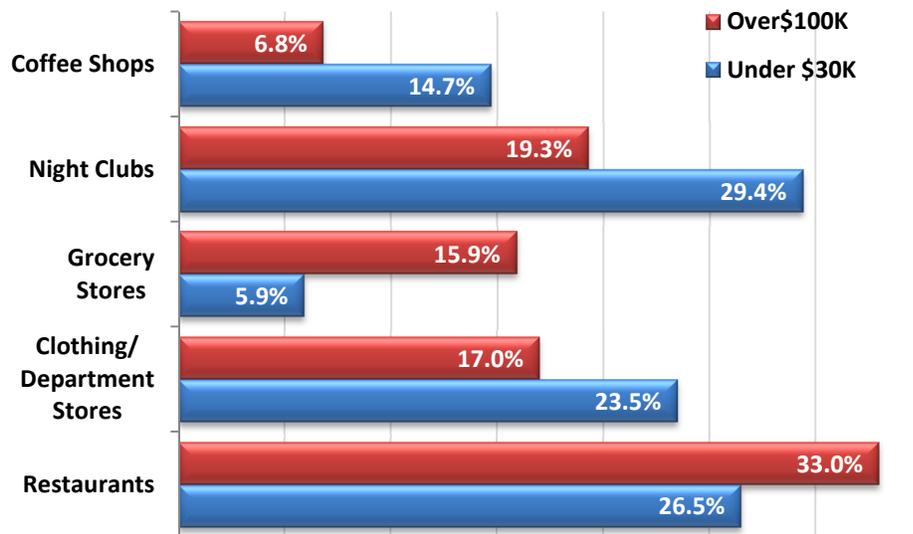
Motivating Factor	18-24	25-44	45-64	65+
Improved storefronts	18.0%	18.2%	8.9%	13.7%
<b>Sense of comfort and safety</b>	<b>4.0%</b>	<b>14.0%</b>	<b>19.6%</b>	<b>19.6%</b>
<b>Better hours of operation</b>	<b>18.0%</b>	<b>20.7%</b>	<b>25.7%</b>	<b>7.8%</b>
<b>Parking availability</b>	<b>22.0%</b>	<b>25.6%</b>	<b>21.8%</b>	<b>11.8%</b>
Better product quality	28.0%	24.0%	25.7%	29.4%
<b>Easy access for pedestrians</b>	<b>14.0%</b>	<b>28.1%</b>	<b>27.9%</b>	<b>39.2%</b>
Better customer service	50.0%	38.8%	41.9%	37.3%
Greater variety of products	42.0%	50.4%	45.3%	43.1%
Lower prices	82.0%	61.2%	59.8%	62.7%

- ❖ In terms of the types of business establishments they would like to see in Doral, the most often mentioned establishments were book stores (26.7%), night clubs (24.8%), and restaurants (20.8%).



- ◆ There are some significant differences in the types of establishments preferred by female and male respondents.
  - A larger percentage of female respondents (20.1%) would like to see more clothing/department stores in Doral than male respondents (10.0%).
  - A larger percentage of male respondents (32.0%) would like to see more bars and night clubs in Doral than female respondents (20.5%).
  - More female respondents (20.9%) believe there are enough business establishments in Doral than male respondents (13.3%).
- ◆ Hispanic and non-Hispanic respondents differ on the type of establishments they would like to see in Doral.
  - While 28.2% of Latinos indicated night clubs as desired establishments in Doral, only 15.8% of White non-Hispanics indicated the same.
  - A larger percentage of Hispanics (9.5%) also pointed to coffee shops than Anglos (3.5%).
  - Another type of establishment preferred more by Hispanics (28.8%) than non-Hispanics (17.5%) were bookstores.
  - A significant percentage of White non-Hispanics (24.6%) believe there are enough establishments of all types in Doral already, compared to 15.5% of Hispanics.
- ◆ Within the different income groups, the most significant differences with regards to the type of business establishments they would like to see in Doral refer to restaurants.

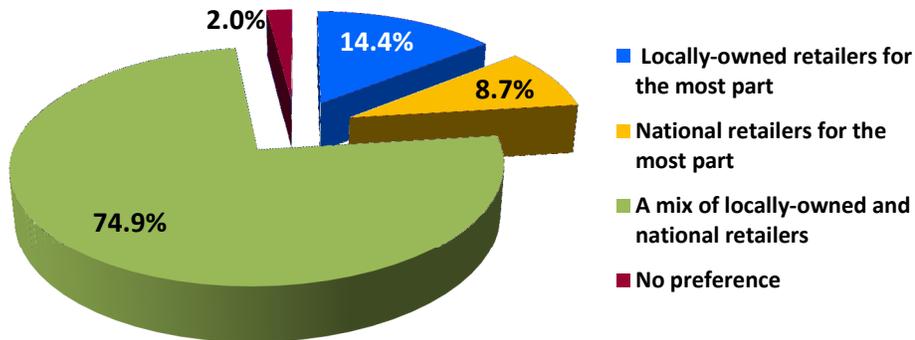
- 33.0% of respondents with household income of over \$100,000 pointed to restaurants as a desired establishment, compared to 26.5% of respondents with income under \$30,000.
- While 23.5% of those with income under \$30,000 want more clothing/department stores, only 17.0% of those with income over \$100,000 indicated the same.
- Grocery stores are a desired type of business establishment for those with income over \$100,000 (15.9%) than for those with income under \$30,000 (5.9%).
- The chart below shows the largest differences in preferences between the two income groups -under \$30,000 and over \$100,000.



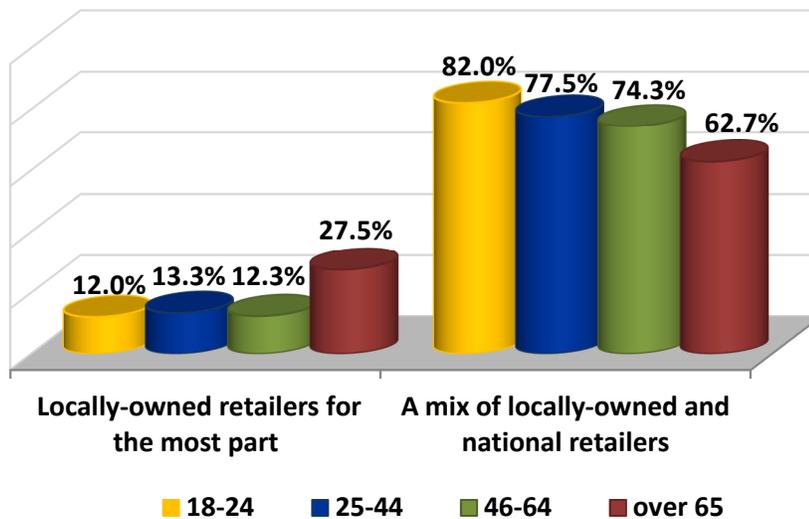
- ◆ There are significant differences in the types of establishments preferred by Doral residents in different age groups. The table below shows the most significant differences in preference for business establishments among the age groups.
  - Doral residents in the younger age groups prefer business establishments which provide an entertainment value, while those in the most advanced age group lean towards establishments which allow for more sedate activities.

Desired Business Establishments	18-24	25-44	46-64	over 65
Bars/Pubs	14.0%	12.4%	14.0%	0.0%
Restaurants	14.0%	28.1%	21.2%	9.8%
Grocery Stores	0.0%	12.4%	10.6%	0.0%
Night Clubs	52.0%	24.8%	24.0%	0.0%
Book Stores	26.0%	18.2%	30.7%	35.3%
There are enough already	6.0%	16.5%	16.8%	33.3%

- ❖ In terms of the retail establishments in their city, most respondents would like to see a mix of local and national retailers.



- ◆ A larger percentage of female respondents (77.1%) would like to see a mix of local and national retailers in Doral than male respondents (71.3%).
- ◆ A larger percentage of White/Anglo respondents (89.5%) would like to see a mix of locally owned and national retailers than Hispanic respondents (71.4%). Conversely, more Hispanics expressed preference for locally-owned retailers (17.5%) than White non-Hispanics (5.3%).
- ◆ Respondents in the higher income groups expressed preference for a mix of locally-owned and national retailers while those of lower income prefer more locally-owned retailers.
- ◆ Doral resident preferences for the types of retailers they want in their city is also related to age. A higher percentage of younger residents expressed interest in a mix of local and national retailers, while more residents over 65 prefer locally-owned retailers. (See figure below)



## OPEN-ENDED COMMENTS

Upon the completion of the survey the respondents had the opportunity to provide additional information. Below are the comments of those respondents who chose to provide any additional information.

Age	Gender	Race/Ethnicity	Comment
18	Male	Latino/Hispanic	Respondent emphasizes the need of more recreational facilities for kids and teenagers in Doral.
19	Male	Latino/Hispanic	Respondent said they need more places for young people in Doral.
22	Female	Latino/Hispanic	there should be more activities such as theater and community center, sports and night clubs
24	Female	White/Anglo	Were all FIU students and it would be better if Doral was more of a college town
29	Female	Latino/Hispanic	we need a place where the trolley schedule can be available
30	Female	Latino/Hispanic	***A mix of both nationally owned and locally owned retailers**
32	Female	Latino/Hispanic	Respondent said that they should lower property taxes.
33	Female	Latino/Hispanic	Respondent said that a furniture store should be opened in Doral, since you have to drive a long way to buy furniture.
33	Female	Latino/Hispanic	Doral is a good city but not to live in forever
35	Female	Latino/Hispanic	The traffic program for the police department is very redundant. The police can sometime abuse their power but it does pay because we do have a sense of security.
35	Female	Latino/Hispanic	I want more parking in the parks. after a certain time, it is horrible
36	Female	White/Anglo	We wouldn't like to compromise the quality of life for just having target in our area. In general, people are very educated in this area, so I think it would be nice to attract a diverse culture, not just Latino, but many others. It's getting there but too slow
36	Male	Latino/Hispanic	More recreational things, bicycle lane, path, trail, public transportation improvement. Trees canopy, tennis courts. More welcoming to outdoor activities. Less traffic lights.
36	Female	Latino/Hispanic	I would love to see a water park in the city, more cultural activities. We do have plenty of sporting activities but not enough cultural.
37	Female	Latino/Hispanic	Respondent said that taxes for lighting and trash are very high in Doral, when compared to those in Fountainbleau, for example.
37	Male	White/Anglo	improve the quality for pedestrian access, and parking safety.
38	Female	Latino/Hispanic	they should do something about pedestrian access really fast, it's horrible
39	Female	White/Anglo	We need Whole Food and Fresh Market
39	Female	Latino/Hispanic	We need a pool for swimming classes for the kids. The only one we have access to is Miami Springs which is far from us.

Age	Gender	Race/Ethnicity	Comment
40	Female	Latino/Hispanic	very nice very quick survey
40	Male	Latino/Hispanic	There are no sidewalks mostly. If I were to go biking, not enough space. Please fix this because it's very dangerous. Speed limit should be enforce.
40	Male	Latino/Hispanic	the police response time is not as good as it should be, and they write unnecessary and unfair tickets violations
40	Male	Latino/Hispanic	Respondent said they should remove the red-light cameras in Doral but keep the only accident camera that the city has, or swap the red-light cameras to accident ones.
41	Female	Latino/Hispanic	Years ago police seems to patrol the streets more, now not so much.
41	Male	Latino/Hispanic	We would like to have a shoe store for kids.
41	Female	Asian	We need a recycling center. And more entertainment for the children such as an ice rink if possible
41	Male	Latino/Hispanic	Respondent emphasized the need of having a WHOLE FOODS store in Doral.
42	Male	White/Anglo	Having a farmer's market would be very great, I forgot to say that previously
42	Female	Latino/Hispanic	Get rid of traffic cameras, and have the police harass people less when it comes to how they work. We don't need % squad cars for one speeding ticket.
42	Female	Latino/Hispanic	bad traffic
43	Female	Latino/Hispanic	Respondent said that there should be more recreational and entertainment facilities in Doral. Respondent also said that the trolley service should be improved, and that they should respect the trolley schedule. Respondent said that the information on the tops and frequency of the trolley is often inaccurate.
44	Female	Latino/Hispanic	We would like to have an organic store in the area.
44	Female	Latino/Hispanic	Respondent said that in general she is very happy in Doral.
44	Female	Latino/Hispanic	Respondent said that Doral needs more high schools. The only one is the Ronald Reagan one and it is too crowded.
45	Male	Latino/Hispanic	The public transportation is very poor. Not everybody has a car; more buses would be a good plus.
45	Female	Latino/Hispanic	Respondent said that more trees should be planted in Doral parks, since there is not enough shade in them to protect people from the sunshine. Respondent also said that she would like to see more policemen in the city's parks.
45	Female	Latino/Hispanic	Respondent said that a community swimming pool should be built in Doral. Respondent also said that all employees of the stores and shopping centers in Doral should be able to speak or at least communicate in English.

Age	Gender	Race/Ethnicity	Comment
46	Male	Latino/Hispanic	The transportation system is horrible, we need direct public transportation from Doral, Brickell, specifically Coral Gable and South Beach and other touristy place. and will help tourism to a very good extant.
46	Male	Latino/Hispanic	Respondent said that traffic is very heavy in rush hours, including big trucks: they should improve this.
46	Male	Latino/Hispanic	Respondent said that if the City of Doral really wants to make the Doral Trolley an OPTION FOR TRANSPORTATION, the frequency of the trolley service must be increased. Nobody wants to wait 30-40 minutes for the trolley.
46	Female	White/Anglo	Respondent repeated that she would like a Whole Food store in Doral, and added that it would be great to have more bike and dog paths in the area.
46	Female	Latino/Hispanic	Hours of operation should be extended on the weekends.
47	Male	Latino/Hispanic	We want the trolley to go more places
47	Male	White/Anglo	We need a Target or Walmart on the west side so that I do not have to drive all the way up there.
47	Male	Latino/Hispanic	Respondent said that he appreciates the effort the City of Doral is doing with parks and sport activities. The city is nice to live in but there is no charm in it.
47	Male	White/Anglo	more Cuban bakeries
48	Male	Latino/Hispanic	Respondent said that she is not a Spanish-speaking person (she is of Asian-Pacific background) and it is very annoying for her that about 80% of the employees of the commercial venues in Doral do not speak English, but Spanish only, thus creating a language barrier.
49	Female	White/Anglo	Respondent said that they should have better restaurants in Doral, with lower prices. Respondent would like to have Cheese Factory, Olive Garden, P.F. Chang restaurants in Doral. Respondent would like to have Fresh Market and Whole Foods supermarkets in Doral.
49	Male	Latino/Hispanic	Respondent said that she is generally very pleased with life in Doral.
50	Female	Latino/Hispanic	The police over extend their bounds, it affect the quality of life around here. I think everything should be balanced. They even break the law themselves. I've lived in Miami all my life and I think the police are abusing their power; They act too much above the law.
50	Female	Latino/Hispanic	The city of Doral needs hospitals, we don't have any. If we have emergencies we have to go very far.
50	Female	Latino/Hispanic	Respondent said that the City of Doral should educate the residents or take other actions because lately some people are dumping trash in the streets and the city is getting dirty and ugly.

Age	Gender	Race/Ethnicity	Comment
50	Female	Latino/Hispanic	Respondent said that security has worsened in the city; there is a general concern among the residents regarding this. Police is more focused on giving tickets to drivers than on improving security.
50	Female	Latino/Hispanic	Respondent said that public transportation in Doral should be improved (both the trolley and the regular bus services). Respondent also said that Doral should have an entertainment and recreational center (like a club) for the whole family, a place where you can go with your family and spend a nice day.
50	Female	Latino/Hispanic	Respondent said that metro bus service in Doral is terrible and it should be improved. Respondent said that it is necessary to wait a long time for the bus and in addition to that, they do not abide by the schedule posted on their website. Respondent said that many Doral residents do not drive and must rely on the bus service for their transportation.
50	Female	Latino/Hispanic	Also There's a lot of foreign nationals that doesn't respect the noise ordinance in terms a party on a weekly basis.
51	Female	Latino/Hispanic	the only thing is that we need another high school.
51	Female	White/Anglo	Respondent said that he would like to have more parks and bicycle routes in Doral.
52	Female	Latino/Hispanic	Traffics is one of the things that needs to be changed or at least looked into around here.
52	Male	Latino/Hispanic	Respondent said that they should put an IKEA store in Doral, as well as a Pet Supermarket and a store like Michael's, where you can buy art-related objects.
52	Male	White/Anglo	Respondent is a M.D. and has seen a lot of young people arrive in emergency rooms due to crazy nights, therefore respondent does not want night clubs for teenagers in Doral, since in his opinion Doral is the last bastion of tranquility in Dade County. Respondent would like to have in Doral something like a Spanish tavern with flamenco and multicultural music that closes no later than 2:00 AM, with a more decent and peaceful atmosphere.
52	Female	Latino/Hispanic	I do most of my shopping online. I go shopping in Doral for things that I cannot buy online like food. It saves me a lot of time. If do not want to pay for shipping, I pick it up at the store.
52	Male	Latino/Hispanic	everything is fine so far
53	Male	White/Anglo	THEY HAVE A LOT OF BIKE ROUTES AND SIDEWALKS IN DORAL AND IT IS GOOD AND SAFE FOR PEDESTRIAN AND BICYCLE RIDERS.
53	Female	Latino/Hispanic	The city hall is a waste of space and tax dollars. The police department is way too big. Its wasteful spending of our money.
53	Male	Latino/Hispanic	Offices are being squished today by Doral authorities. They have so many restrictions by the offices that make it impossible to keep a business open. The offices building are all empty because everybody moving out because they cannot cope with this city government. Stupid requirement , continuous inspection, which delays opening and cost money. It is really pitiful and I believe they are forcing people out to an extent.

Age	Gender	Race/Ethnicity	Comment
53	Female	Latino/Hispanic	More security in the streets for the people to feel safe when they walk
54	Female	Latino/Hispanic	THERE SHOULD BE SOMETHING LIKE A DOWNTOWN IN DORAL, LIKE A MAIN USA STREET WHERE PEOPLE CAN GO, LIKE LINCOLN ROAD IN MIAMI BEACH, FOR PEDESTIANS ONLY.
54	Female	Latino/Hispanic	Respondent said that the City of Doral must keep the current level of security and prevent crime from increasing in the area.
54	Female	Latino/Hispanic	Respondent is a businessman. He said that it takes a long time to open a business or invest in Doral, due to the annoying and complicated bureaucratic procedures you have to go through. Due to this situation, many investors invest in other cities or abroad. Respondent also complained of the need to build more elementary and high schools in Doral, since the population is constantly growing and the existing schools have no capacity, classrooms are crowded (over 45 students per class) and many students are forced to enroll in distant schools. Respondent suggested to build an open commercial center in Doral, similar to the Pembroke Gardens in Pembroke Pines, with many stores and recreational areas. By doing this, prices of goods would go down in Doral.
55	Male	White/Anglo	Respondent said that she thinks that living standard in Doral is better than in other South Florida cities.
55	Female	Latino/Hispanic	I would like to see improvement on taxes, Property taxes more importantly .Also more competition between service companies, example FPL. If I don't choose their company I won't have the services, basically stop the monopoly for some company
56	Female	Latino/Hispanic	Respondent said that more cultural facilities are needed in Doral.
57	Female	Latino/Hispanic	Respondent said that she would like to have another gym in Doral, since the only one they have is always crowded. Respondent said that prices of services are extremely high in Doral, for instance, beauty parlors are prohibitive. Respondent would like a laundry & dry cleaning business in Doral.
57	Female	Latino/Hispanic	Respondent said that he would like to have a movie theater in Doral, as well as an Olive Gardens and a Burger King restaurant closer to his home. Respondent complained of the lack of easy access for pedestrians in Doral and in Miami in general.
58	Female	Latino/Hispanic	Respondent emphasizes the need to build a big cultural center in Doral, which includes a movie theater to show art and European films (like a cinematheque), a concert hall, art galleries, theater stage, exhibitions, cultural events etc. This would definitely improve the quality of life in the neighborhood.
59	Female	Latino/Hispanic	they should take the traffic cameras off.

Age	Gender	Race/Ethnicity	Comment
59	Female	Other	Respondent said that the improvement of recreational activities in this area is impressive, but there should be more places for young people and teenagers. They should have more options because it is not a problem now, but eventually it can turn into one. Respondent is happy to live here and he thinks it is a great place to live. What would be good to have is a furniture store in the area, given the fact that they are building more housing.
60	Female	Latino/Hispanic	We need more African Americans in the neighborhood, the city of Doral has tried to "priced them out of the market".
61	Male	Latino/Hispanic	I would really hope we get a Loews or home depots, and major entertainment such live theater and music
63	Female	Latino/Hispanic	The main concern is the traffic, the 36th street is a nightmare to drive around 7h45 am . Also it's equally terrible in the hours people have lunch. And there not enough road space for trucks especially when they are exiting palmetto expressway and the turnpike. Some parks need more trees because there's not enough shades, especially the Bermudez park. Lastly a common place such business square like the one in Miami lakes where people can walk without having to worry about cars and traffic.
64	Female	Latino/Hispanic	Respondent said that the City of Doral should have one big park with stadiums to play soccer, baseball, etc. Respondent also said that the Doral trolley hours of operation should be extended to 9:00 PM and that the information about its schedule should be accurate. Respondent also said that the route of the trolley should be extended because it does not cover the whole City of Doral.
64	Female	Latino/Hispanic	Respondent said that a Catholic Parish should be built in Doral, as well as a theater and a venue for community and cultural events.
65	Female	Latino/Hispanic	Respondent said that they should put a cover, a shelter, on the trolley stops, since people have to wait under the rain or sunshine. Respondent suggested that some stores should open earlier every day (at 8:00 AM) since all of them open at 10:00 AM. They should take early shoppers into account.
68	Female	Latino/Hispanic	Respondent said that they should improve the traffic on 25th street because of the many commercial trucks passing in the area.
68	Female	Latino/Hispanic	Respondent said that a Home Depot or Lowe's store is necessary in Doral, as well as a facility smaller that a fitness center and WITH NO CONTRACT with just a sauna, a Turkish bath, a small pool and hydro massage.
69	Male	White/Anglo	We would like to see more department stores in the city. All of them are located in the mall.
69	Female	Latino/Hispanic	Respondent said that the trolley service should be improved. You have to wait too long for it and then 2 trolleys come together.
70	Female	Asian	Respondent said a Catholic Church should be built in Doral.

Age	Gender	Race/Ethnicity	Comment
71	Female	Latino/Hispanic	Respondent said that the city government should be more responsive to the citizens' suggestions. Respondent said that he has e-mailed the Doral government several times regarding fires from dryers and regarding food trucks and he never got a reply.
72	Female	White/Anglo	Respondent suggested to set up a ZIP CAR in Doral.
74	Female	White/Anglo	Respondent said that she would like to have a greater variety of restaurants in Doral, including an Asian food restaurant. Respondent also said that they should plant more trees in the Doral parks.
75	Male	Other	Respondent would like to have a Whole Foods and a Fresh Market store in Doral.
75	Male	Other	Respondent said that it is necessary to build a big recreational and cultural center for teenagers in Doral where they can attend film and art exhibitions, talks by specialists, social workers, etc. because they need good recreation and orientation. Respondent also said that some teenagers are having drugs or drinking in the area, as well as carelessly driving, and they should be educated to prevent all that from happening.
75	Female	White/Anglo	Respondent said that a Cuban bakery and a Catholic Parish are necessary in Doral, as well as a comprehensive cultural center for music, the arts, good film, etc.
76	Female	Latino/Hispanic	I do not work. Nothing more will encourage me to shop more frequently in my neighborhood. I love Doral.
77	Female	Latino/Hispanic	Respondent said that there is a problem when crossing streets to drive into CVS, Winn Dixie and other businesses and this is something that should be fixed, it is a matter of opening other entrances due to the heavy traffic. Respondent also complained that the fees of doctors and dentists in Doral are considerably higher because of the high cost of business rental in the area. Respondent also said that she considers incorrect that many Winn Dixie employees do not speak English.
78	Female	Latino/Hispanic	Very poor pedestrian walkway, and I bike a lot. So that might need some change if possible
78	Female	Latino/Hispanic	Respondent said that she would like to see a high-end grocery store in Doral, where you can buy fresh produce and quality and healthy food, as FRESH MARKET or WHOLE FOODS.
79	Male	Other	Respondent said that vehicles go at very high speed in 41st Street. Respondent complained against the red-light cameras. She thinks they are abusive and unfair. Respondent said that this is a job for the traffic police, not for a machine.
79	Male	White/Anglo	Respondent said that a Catholic Church should be built in the area, and that more US Postal Service mailboxes are needed in Doral.
83	Male	Latino/Hispanic	Respondent said that public transportation should be improved in Doral. Currently it is bad.
Refused to Provide	Female	Latino/Hispanic	Respondent said that public transportation should be improved in Doral. Currently it is bad.

Age	Gender	Race/Ethnicity	Comment
Refused to Provide	Male	Refused to Provide	Respondent moved to Doral only after she retired. She does not go out very much and she is not very familiar with the city.
Refused to Provide	Female	Latino/Hispanic	Respondent is a retired architect and he states that the design of Doral is not pedestrian-friendly. You are forced to have a vehicle.
Refused to Provide	Male	Refused to Provide	Public bus service should be improved.
Refused to Provide	Female	Refused to Provide	I am wheelchair bound and I shop mostly online for my needs. Family members brings me stuffs if I need or take me out which is not that much