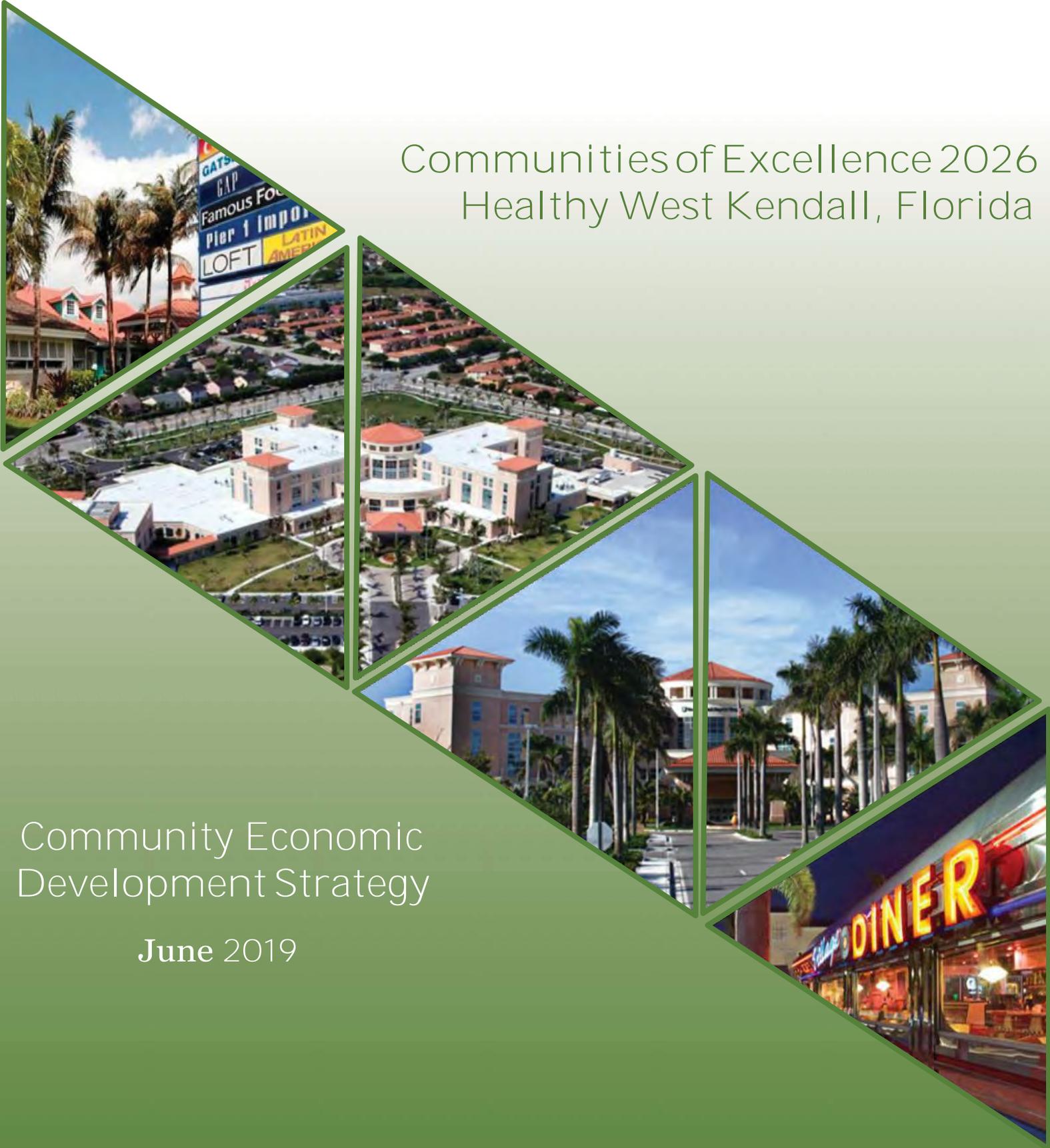


Communities of Excellence 2026 Healthy West Kendall, Florida



Community Economic
Development Strategy

June 2019

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Introduction

Led by West Kendall Baptist Hospital, the Healthy West Kendall coalition was selected as one of five communities in the U.S. to participate in Communities of Excellence 2026 — a learning collaborative that uses the Baldrige Excellence Framework to improve the health status, educational attainment and economic vitality of the community. The *Healthy West Kendall Community Economic Development Strategy* (CEDS) was designed to advance the work of the coalition, including the previously completed West Kendall Baldrige-based Community Profile.

The *Healthy West Kendall CEDS* provides the analytics and economic strategies for the Healthy West Kendall Communities of Excellence 2026. An in-depth understanding of the economic conditions, challenges and opportunities will be fundamental to improving the health and quality of life for West Kendall residents. The *CEDS* consists of two major elements: 1) a comprehensive “Community Economic Analysis” of the West Kendall community and trade area, and 2) “Community Economic Strategies” that identify opportunities for business and job growth, formalized educational and workforce development and the incorporation of performance indicators and metrics.

The *Healthy West Kendall CEDS* also builds on the 2015 comprehensive report of the West Kendall area, *West End Strategy: A Vision of the Future* prepared by Florida International University’s College of Architecture and the Arts. The report found the West Kendall area had rapidly matured during the previous decade and was approaching full build-out. The report went on to recommend that West Kendall’s continuing development would need to be more focused inwardly, requiring different approaches to land use, the local economy, development density and transportation. The report noted the opportunity that existed to re-focus on the aspirations of residents who clearly enjoy the West Kendall’s many amenities and quality of life but had voiced a unified desire to see West Kendall evolve into a much more livable, walkable and urbane community.

Summary of Key Findings

A Community with Regional Impact

According to the US Census Bureau, the 2017 population of the West Kendall area's seven (7) zip codes totaled 356,108 persons, or 13 percent of Miami-Dade County's population. West Kendall has become a significant urbanized area — its population is equivalent to the 47th largest City in the Nation and the 4th largest City in Florida. The population of the West Kendall area is bigger than the cities of Anaheim, Corpus Christi, St. Louis, and Pittsburgh.

West Kendall also functions as part of a larger, rapidly growing urbanized corridor west of the Florida Turnpike, stretching from SW 216th Street to the Broward County line — a major, large, and growing urbanized corridor with population of 523,206 persons living and working at the edge of the Everglades. ***Considered as a single urbanized area, the combined population of this western corridor is equivalent to the 34th largest City in the in US and the second largest City in Florida. The combined population of the corridor west of the Turnpike is bigger than the cities of Fresno, Sacramento, Kansas City, Atlanta, Raleigh, and Miami.***

A Stable “Mature” Community

During the 1990's and through most of the last decade, West Kendall was one of the state's fastest growing areas driven by an explosion in new housing development. Over the last decade, West Kendall's growth has stabilized. The population has increased 7.1 percent since 2012 (averaging 1.4 percent per year), which is comparable to the County's rate of growth over the same period. And, like much of the rest of Miami-Dade, growth is still driven by international in-migration. Reflecting this history, Latinos now comprise the vast majority (81.2 percent) of West Kendall's population.

A Highly Competitive Labor Force

An estimated 29.6 percent of West Kendall's residents have a bachelor's degree and 17.6 percent have graduate or professional degrees, far ahead of the County and U.S. West Kendall also has a high performing labor force. West Kendall's employed residents represent one of the State's best overall labor forces. West Kendall's residents are overwhelmingly employed in managerial positions across all major industry groups. An estimated 46 percent of all resident workers are employed in managerial occupations, compared to 35.9 percent for the rest of the County.

Employed residents in West Kendall earn far more than workers across the County. Median earnings for full-time employed workers over 16 years old living in West Kendall, at \$52,908,

are 27 percent higher than for the County median full-time worker (\$41,585). The residents of West Kendall, on average, earn more than their counterparts across the County in every industry except Information and Accommodation and Food Services.

West Kendall's percentage of self-employed workers, at 15.7 percent, is both higher than the rest of the County (14.1 percent), and significantly greater than the U.S. average (9.7 percent).

Where Residents Work

Despite recent mobility and office development trends, residents of West Kendall are locked into an out-moded and unsustainable work transportation pattern. Simply put, the number of employed persons living on West Kendall greatly exceeds the number of jobs within West Kendall by 100 percent. As important, West Kendall resident overwhelmingly commute by car each day to points west including the City of Miami, Doral, Coral Gables, and South Miami.

The mismatch between the local jobs and occupations located in West Kendall and its residents represents a completely unsustainable transportation pattern. West Kendall has a net outflow of 85,850 workers per day, and at the same time, an estimated 89.1 percent of West Kendall's local jobs are filled by workers who live outside the area. **Only 4 percent of West Kendall's employed residents (5,430 workers) live and in West Kendall, one of the lowest percentages of all communities in Miami-Dade County.**

This pattern creates some of the area's worst rush-hour congestion and is responsible for traffic congestion across Miami-Dade County. Further, most of West Kendall's major roads operate at service levels D or below during rush hour. The community's high rate of commuter workflow is one of its most serious challenges, threatening the environment, human health and local funding resources. It also places West Kendall at a **growing competitive disadvantage** to create new jobs.

Advanced Industry Composition

An important 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 advance industries grew by 63 percent from 1975, compared with a 17 percent increase outside the sector.
- The total U.S. employment in the Advanced Industries Sector represent 8.7 percent of total U.S. employment, but over 17 percent of total U.S. output. The Sector is a crucial foundation of extensive supply chains and third-party employment in a wide range of support industries. As such, the composition of the Advanced Industry sector is a good measure of the technical capacity, sophistication, and growth potential of a local economy.

Total sales of West Kendall's Advanced Industry Sector, at just over \$1 Billion, is only 6 percent of total sales of all businesses in the community, significantly less than the US average. However, total Advanced Industry employment, at 4 percent of total local employment, is slightly ahead of the County, at 3 percent. ***Most importantly, West Kendall has a significantly higher composition of Advanced Industry Manufacturing than the rest of the County.***

The Sources of West Kendall's Future Economic Growth

With West Kendall nearing build-out, large jobs-producing projects and large-scale corporate re-locations is unlikely. This means that new employment growth will be less dependent on large land, building and infrastructure. As such, planning for West Kendall's economic growth and diversification won't be able to rely on traditional commercial and office development. Instead West Kendall's community economic development strategies must focus on its competitive advantages - geography, industries, employment, occupations, income, labor force and overall quality of life. West Kendall's future growth will be driven by:

- The growth of existing companies through innovation and improving competitiveness by making investments in new technology and productivity;
- The expansion of existing small businesses employing 10 people or less;
- Improving the skills, education, and wages of West Kendall's resident labor force, providing skilled employees to support the leading industries, and increasing local spending power;
- Support the development of pools of local entrepreneurial talent and new small business creation and entrepreneurship;
- Incremental redevelopment and re-purposing of existing commercial properties to new mixes of uses

Workshifting and the Changing Geography of Work

The patterns of retail, office and industrial development have been undergoing rapid and fundamental change across the U.S., and West Kendall is no exception to these trends. On the demand side, the expansion and development of new commercial space is no longer tied to traditional growth of population and employment. On the supply side, the inventory of available commercial space to accommodate economic expansion is considerably less than it has been in modern industrial history.

Detailed analysis of where its residents work and where businesses are located indicate that West Kendall is exemplary of the deep changes occurring in how we work, where we work and who we work for. The community economic analysis found too many of its residents commute to work outside the area exacerbating traffic congestion, degrading quality of life and the environment.

The practice of employers moving workers out of a central office on a daily basis and either structuring telecommuting or moving satellite offices closer to where their employees actually live is known as **workshifting**. Workshifting and telecommuting are a hybrid of workplace and office cost reduction, land use and transportation strategies to not just move workers into mass transit, but quantifiably reduce the number of commuter trips workers need to make for work each week.

Co-working, shared, home office, and off-site office space are playing a rapidly growing role in the future of the workplace. Workshifting is gaining ground across many U.S. cities, particularly in South Florida, to reduce commute times, take commuters off the road, reduce traffic volume and increase worker productivity by reducing or eliminating travel times. Telecommuting has the potential to save employers \$10,000 per employee per year due to increased productivity, reduced real estate and facility costs, and reduced turnover. Other benefits include reduced driving cost and time savings for employees, energy savings, reduced congestion and environmental benefits to the society. Flexible work arrangements are also essential to attract and retain the new generation of labor force.

“Branding” West Kendall

The topic of branding for the West Kendall area was introduced as part of the *West End Strategy: A Vision of the Future* report. The *Healthy West Kendall CEDS* provide the opportunity to re-focus on the aspirations of residents who clearly enjoy the West Kendall's many amenities and quality of life, but who have voiced a desire to see it evolve into a much more livable, walkable and urbane community. The following are the assets and socio-economic conditions which provide the support for West Kendall's brand:

- A focus on families and cultural diversity;
- Low crime rates and poverty rates;
- High educational attainment and household incomes;

- A wider choice of housing types;
- Major institutions nearby including West Kendall Baptist Hospital and Florida International University.

Population and Growth

A Community with Regional Impact

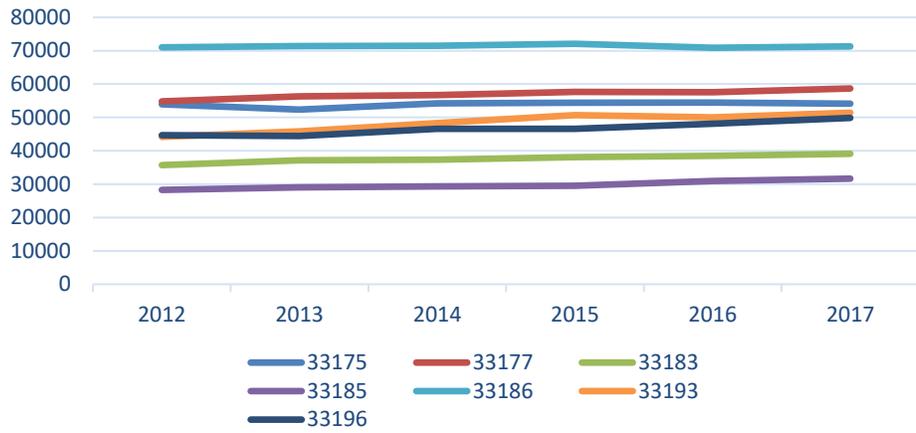
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During the 1990's and through most of the last decade West Kendall was one of the state's fastest growing areas driven by an explosion in new housing development. Over the last decade West Kendall's growth has stabilized. The population has increased 7.1 percent since 2012 (averaging 1.4 percent per year), which is comparable to the County's rate of growth over the same period. And, much like the rest of Miami-Dade, growth is still driven by international immigration. Reflecting this history, Latinos now comprise the vast majority (81.2 percent) of West Kendall's population.

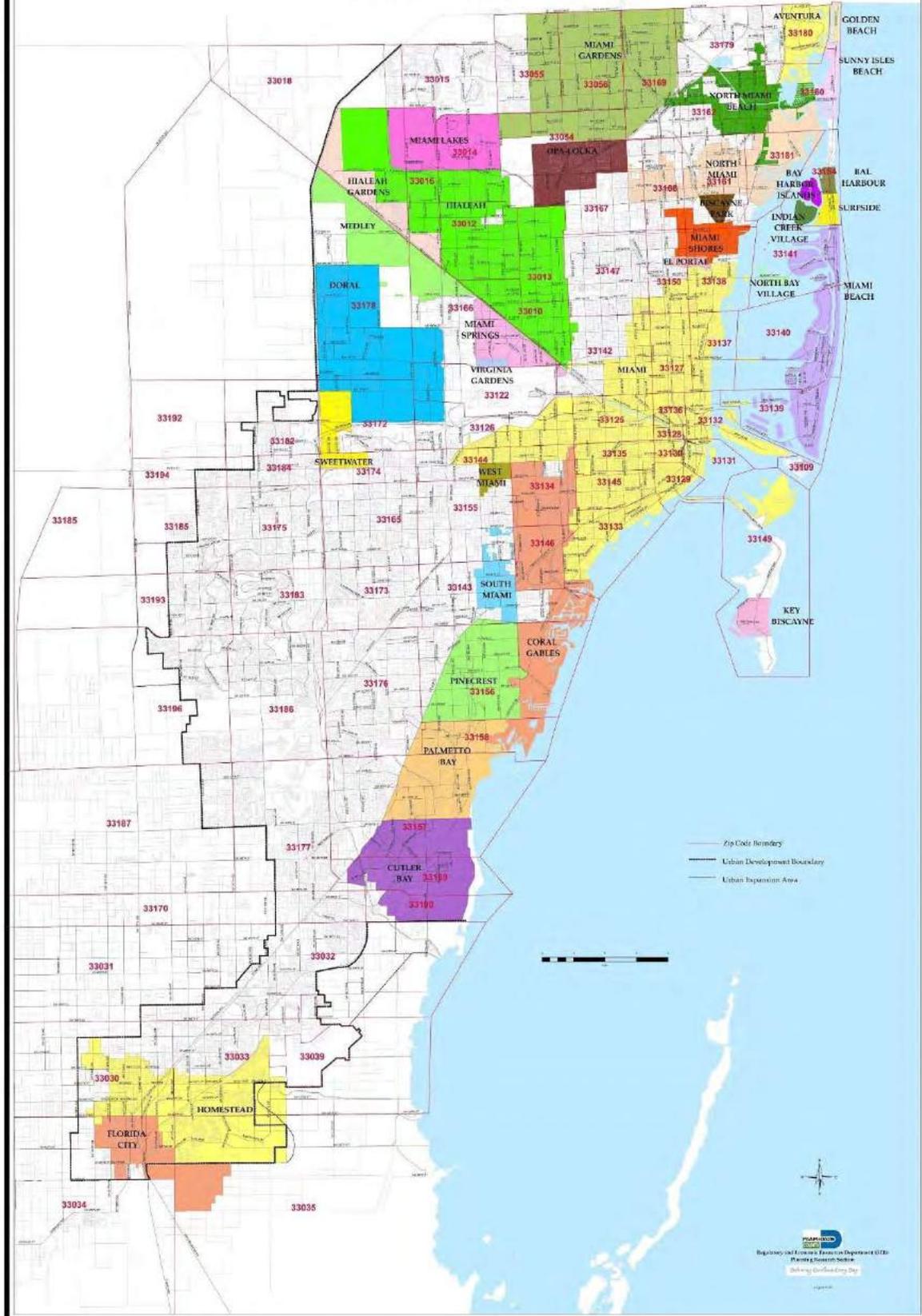
Population Trends by Year



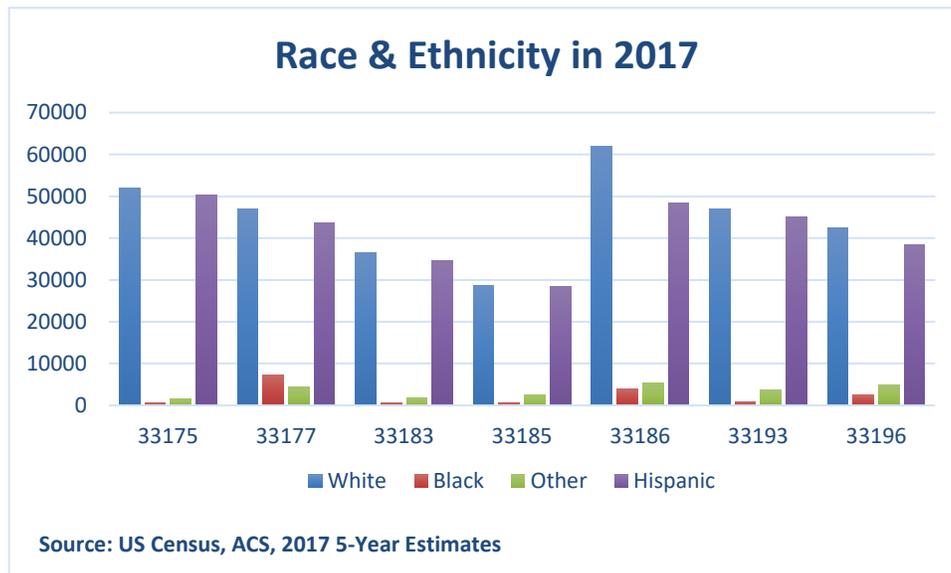
Source: US Census, ACS, 2011 - 2017 5-Year Estimates

MUNICIPALITIES

MIAMI-DADE COUNTY, FLORIDA



According to the US Census, 88.5 percent of the residents of West Kendall identify themselves as White. This is slightly higher than Miami-Dade County's make-up where 75.6 percent identify themselves as White. West Kendall also has a significantly higher Latino population (81.2 percent) compared to Miami- Dade County (67.5 percent).



West Kendall's population mobility in recent years is similar to that of Miami-Dade County. As such, after two decades of significant population migration from eastern sections of Miami-Dade County, West Kendall's settlement pattern is fairly representative of the County, as a whole.

Geographical Mobility	Zip Codes							% in Miami-Dade County
	33175	33177	33183	33185	33186	33193	33196	
Total living in area	53,839	58,321	38,605	31,359	70,743	50,900	49,163	2,672,590
Moved within same county	4.7%	8.3%	7.9%	6.4%	6.8%	7.7%	5.4%	8.2%
Moved from a different county within same state	0.1%	0.5%	0.1%	0.6%	0.7%	0.2%	0.7%	1.0%
Moved from a different state	0.2%	0.8%	0.6%	0.2%	0.4%	0.9%	0.7%	0.9%
Moved from abroad	1.3%	1.6%	2.7%	1.8%	1.7%	1.9%	1.2%	1.9%

Source: US Census, ACS, 2017 5-Year Estimates

Age Distribution

The West Kendall area is aging slightly. The median age across West Kendall, at 39.9 years has increased by years, or 4 percent from 2013 to 2017. West Kendall's median age is comparable to Miami-Dade County (39.5) and the U.S.(37.8).

West Kendall's age distribution largely mirrors that of the County. The most notable shift has been the shrinking of Generation X, or residents age 5 to 17 years old, which shrank by 7.3 percent. However, the West Kendall area fairs better than Miami-Dade County in maintaining the millennial generation (residents age 18 to 34) which shrank by 53 percent within the County

A Community of Families

According to 2017 ACS estimates, there are 98,813 households in West Kendall, which represents 11.5 percent of total households in Miami-Dade County. Compared to Miami-Dade County, West Kendall has a dramatically higher composition of family households (82 percent) compared to the County (68.2 percent).

Households	Family Households	Nonfamily Households	Total Households
33175	12,305	2,995	15,300
33177	12,240	2,154	14,394
33183	9,410	2,528	11,938
33185	7,010	1,042	8,052
33186	16,465	5,040	21,505
33193	12,417	1,966	14,383
33196	11,211	2,030	13,241
Total in West Kendall	81,058 (82%)	17,755 (18%)	98,813
Total In Miami-Dade	585,476 (68%)	272,813 (32%)	858,289

Source: US Census, ACS, 2017 5-Year Estimates

Working Family Households

Of the 81,058 families located in West Kendall, 90.8 percent were working in 2017. In comparison, 86.8 percent of Miami-Dade County's families are working.

Zip Codes	Total Families	2017 Working Families	Percent in 2017
33175	12,305	10,747	87.3%
33177	12,240	11,177	91.3%
33183	9,410	8,175	86.9%
33185	7,010	6,621	94.5%
33186	16,465	15,310	93.0%
33193	12,417	11,075	89.2%
33196	11,211	10,490	93.6%
Total in West Kendall	81,058	73,595	90.8%
Total in Miami-Dade	585,476	508,071	86.8%

Source: US Census, ACS, 2017 5-Year Estimates

Major Economic Development Assets

The West Kendall End is home to three of the County’s most significant economic assets: 1) Baptist Health, 2) Florida International University, and 3) Miami Executive Airport.

The West Kendall Baptist Hospital is part of the Baptist Health South Florida hospital network – a national not-for-profit system of hospitals. The Hospital, a comprehensive care facility, is a major regional employer, with over 15,000 employees, 2,211 medical staff, net operating revenues of \$2.17B, over 71,000 annual admissions, 242,177 urgent care visits, 313,116 emergency center visits, and 7,170 international patient visits each year in 2013.

Florida International University, located at the Northern edge of the West End, is a State University that has grown to the 4th largest Public University in the Nation, with over 54,000 students, and over 8,000 faculty and staff. FIU plans to grow as a major national research institute.

Miami Executive Airport, formerly the Kendall-Tamiami Airport, is a public airport located on 1,380 acres in the southwest portion of the West End. Operated by the Miami-Dade Aviation Department, the airport serves mostly single engine light aircraft, and is US International Port of Entry, with a US Customs Inspections station based there. Over 450 aircraft are permanently based at the airport, which hoisted over 186,000 takeoffs and landings in 2012.

West Kendall Baptist, FIU, and the airport have significant economic impact in the West Kendall, with additional significant expansion capacity that could have a critical role in the Community’s future development. The West Kendall Baptist campus includes large acreage slated for future development, which may include health care facilities, research and/or medical offices. FIU has continued expansion of its main campus, adding a new medical school complex, a future hotel, and multiple new research and engineering labs. In addition to underutilized building space inside the Airport, Miami Executive Airport is surrounded by additional vacant acreage ideally suited for air transport, manufacturing, research, and avionics businesses.

Industry Composition & Economic Base

Low Employment Density

West Kendall's **employment density**, or the ratio of jobs to employed residents, is one of the lowest in Miami-Dade County. Over 6,800 business employer establishments employ 87,766 workers. However, 176,750 employed persons over age 16 live in West Kendall — an employment density ratio of .5. Employment density closer to 1 is preferred, providing greater local employment opportunity, daily spending, and lower transportation impacts.

Non-Employer Establishments (NES), or businesses with one employee — its principal — are a growing part of the economy. NES are not typically counted as a part of employment totals. However, NES businesses make up 85 percent of all business and 45 percent of employment in the County. NES businesses are not counted at the Zip Code level. **However, if West Kendall is reflective of the rest of the County's economy, it could have as many as 28,000 to 37,000 non-employer establishments with as many additional jobs.**

Rapid Establishment & Job Growth

West Kendall added 664 employer business establishments from 2012 to 2016, growing at an 11 percent rate, compared to 9 percent for the County. The area added 13,690 jobs between 2012 and 2018, a growth rate of 18 percent that eclipsed the County's growth rate of 15 percent for the same period. Additionally, EMSI, Inc. has forecast that the rate of job growth for the County through 2024 will slow significantly, but that West Kendall is expected to grow its jobs base by 8 percent, compared to 6 percent for the County.

Industry Concentration and Economic Base

In general, West Kendall's industry composition looks very much like Miami-Dade County — a balanced mix of personal services, retail, and professional services, a high proportion of medical services, and a high percentage of local government employment. However, West Kendall's industry composition differs from the County in three major ways:

- Agriculture plays a larger role in the West Kendall economy than elsewhere in the County, in particular, services supporting growing and farming industries. NAICS 1151, Support Activities for Crop Production, comprises 4 percent of total employment in West Kendall;
- A larger distribution of manufacturing activity than the rest of the County; and
- A much smaller composition of tourism related industries, especially NAICS 7211:Traveler Accommodation.

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 West Kendall account for 22 percent of total employment (excluding non-employer establishments) compared to 36 percent for the US. However, traded sectors account for an inordinate share of the area's jobs growth. From 2012 to 2018, traded sector employment growth accounted for 28 percent of total job expansion in West Kendall, and is forecasted to account for 30 percent of all job growth to 2014.

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.**

West Kendall's leading industry sectors, based on its traded industry status, employment share and high Location Quotients include:

- Support Activities for Crop Production
- Utility System Construction
- Agencies, Brokerages, and Other Insurance Related Activities
- Architectural, Engineering, and Related Services
- Electronic Shopping and Mail-Order Houses
- Other Miscellaneous Manufacturing
- Other Professional, Scientific, and Technical Services
- Support Activities for Air Transportation

Four **local** industry sectors, based on employment size and location quotient, representing over 17 percent of West Kendall's total employment include:

- Local Government, Excluding Education and Hospitals
- General Medical and Surgical Hospitals
- Federal Government, Civilian
- Activities Related to Real Estate

Additionally, traded industry sectors in create higher paying jobs than local industries. 21 of West Kendall's top 35 traded industry sectors pay median wages more than \$50,00 per year, and 7 of its top 35 traded sectors pay median wages more than \$75,000 per year.

West Kendall - Leading Traded Industries

Industries	2018 Jobs	2024 Jobs	Job Growth 2012-2018	Job Growth 2018-2024	2018 Location Quotient	2018 Wages, Salaries, & Proprietor Earnings	2018 Total Sales
1151 Support Activities for Crop Production	3,763	4,455	1,246	692	14.01	\$27,406	\$139,788,919
5242 Agencies, Brokerages, and Other Insurance Related Activities	947	1,035	259	88	1.12	\$67,663	\$285,635,457
5416 Management, Scientific, and Technical Consulting Services	866	1,029	247	162	0.90	\$69,565	\$159,307,009
5413 Architectural, Engineering, and Related Services	848	955	184	107	1.01	\$67,874	\$155,717,126
2371 Utility System Construction	774	1,246	568	472	2.59	\$62,381	\$176,309,957
7139 Other Amusement and Recreation Industries	694	770	164	77	0.89	\$20,616	\$41,613,334
5412 Accounting, Tax Preparation, Bookkeeping, and Payroll Services	690	737	85	47	1.08	\$53,099	\$84,529,989
4238 Machinery, Equipment, and Supplies Merchant Wholesalers	687	586	(120)	(101)	1.82	\$65,326	\$172,872,586
5221 Depository Credit Intermediation	685	626	(48)	(59)	0.74	\$81,510	\$236,622,407
6116 Other Schools and Instruction	594	644	15	49	1.81	\$23,250	\$35,924,824
5511 Management of Companies and Enterprises	555	580	121	25	0.44	\$152,979	\$190,399,947
5419 Other Professional, Scientific, and Technical Services	524	603	125	79	1.10	\$44,889	\$105,797,083
4841 General Freight Trucking	497	548	114	51	0.76	\$36,965	\$123,562,217
5415 Computer Systems Design and Related Services	482	557	144	74	0.40	\$86,598	\$100,496,890
3399 Other Miscellaneous Manufacturing	470	524	135	54	2.66	\$43,131	\$94,490,588
4234 Professional and Commercial Equipment and Supplies Merchant Wholes	469	458	51	(11)	1.30	\$80,419	\$156,055,440
5411 Legal Services	417	466	80	49	0.57	\$83,993	\$101,881,531
4244 Grocery and Related Product Merchant Wholesalers	416	456	48	39	0.96	\$51,434	\$81,624,029
4539 Other Miscellaneous Store Retailers	343	390	50	47	1.59	\$32,923	\$45,617,111
2362 Nonresidential Building Construction	342	374	124	32	0.71	\$66,393	\$73,082,278
4251 Wholesale Electronic Markets and Agents and Brokers	338	240	(206)	(97)	0.97	\$62,951	\$51,166,966
4541 Electronic Shopping and Mail-Order Houses	327	465	164	138	1.29	\$33,938	\$62,146,397
4239 Miscellaneous Durable Goods Merchant Wholesalers	302	346	50	44	1.75	\$46,227	\$80,035,743
3254 Pharmaceutical and Medicine Manufacturing	298	257	(10)	(41)	1.87	\$74,897	\$151,532,662
5614 Business Support Services	278	257	3	(21)	0.53	\$34,084	\$32,720,349
5613 Employment Services	267	285	71	18	0.14	\$34,997	\$26,708,168
4881 Support Activities for Air Transportation	264	305	51	41	2.19	\$56,096	\$53,094,662
3118 Bakeries and Tortilla Manufacturing	251	260	49	9	1.40	\$24,927	\$26,795,024
5173 Wired and Wireless Telecommunications Carriers	243	191	(24)	(53)	0.66	\$89,495	\$316,036,326
7115 Independent Artists, Writers, and Performers	230	238	13	9	1.40	\$24,427	\$15,705,068
6113 Colleges, Universities, and Professional Schools	228	273	58	44	0.21	\$56,325	\$30,251,037
5222 Nondepository Credit Intermediation	219	213	26	(6)	0.65	\$86,017	\$99,275,118
1110 Crop Production	217	224	14	7	0.50	\$31,338	\$41,011,758
4236 Household Appliances and Electrical and Electronic Goods Merchant Wh	190	174	(4)	(16)	1.00	\$74,719	\$93,377,822
4249 Miscellaneous Nondurable Goods Merchant Wholesalers	184	169	(1)	(15)	1.00	\$52,699	\$60,498,502
	18,898	20,931	3,846	2,034		\$45,844	\$3,701,684,326

Source: EMSI Inc.

West Kendall - Leading Local Industries

Industry	2018 Jobs	2024 Jobs	Job Growth 2012-2018	Job Growth 2018-2024	2018 Location Quotient	2018 Wages, Salaries, & Proprietor Earnings	2018 Total Sales
7225 Restaurants and Other Eating Places	6,833	7,399	1,151	567	1.18	\$24,243	\$587,808,084
9039 Local Government, Excluding Education and Hospitals	6,305	6,351	167	46	2.05	\$70,929	\$2,158,333,655
6221 General Medical and Surgical Hospitals	5,124	5,545	541	422	2.02	\$66,756	\$958,792,972
5617 Services to Buildings and Dwellings	3,184	3,425	492	241	2.04	\$21,857	\$204,564,540
4451 Grocery Stores	3,063	3,104	352	41	2.08	\$24,032	\$223,475,548
2382 Building Equipment Contractors	2,582	2,846	803	264	1.99	\$43,378	\$355,969,241
9011 Federal Government, Civilian	2,443	2,418	49	(25)	1.57	\$89,189	\$3,416,246,626
2361 Residential Building Construction	1,583	1,805	555	222	2.39	\$41,230	\$226,797,963
4523 General Merchandise Stores, including Warehouse Clubs and Supercent	1,463	1,637	376	174	1.38	\$28,865	\$134,948,423
5313 Activities Related to Real Estate	1,457	1,846	337	389	3.17	\$49,066	\$437,142,036
2383 Building Finishing Contractors	1,408	1,498	351	90	2.03	\$30,505	\$156,000,829
9036 Education and Hospitals (Local Government)	1,374	1,664	654	290	0.30	\$64,428	\$207,171,658
6244 Child Day Care Services	1,308	1,397	176	89	1.95	\$21,905	\$54,580,214
6211 Offices of Physicians	1,294	1,467	186	173	0.90	\$74,274	\$187,583,913
9029 State Government, Excluding Education and Hospitals	1,241	1,265	61	24	1.02	\$42,347	\$741,035,023
4461 Health and Personal Care Stores	1,116	1,129	35	13	1.90	\$38,007	\$109,769,409
2381 Foundation, Structure, and Building Exterior Contractors	1,097	1,193	343	96	1.83	\$34,455	\$122,889,821
8141 Private Households	1,045	1,133	118	88	2.20	\$16,461	\$17,703,626
8131 Religious Organizations	1,033	1,069	95	36	1.09	\$26,078	\$82,184,596
8121 Personal Care Services	975	1,028	99	53	1.40	\$21,894	\$86,354,256
4441 Building Material and Supplies Dealers	940	1,030	245	90	1.48	\$28,793	\$89,145,520
5616 Investigation and Security Services	904	911	128	8	1.73	\$29,632	\$63,717,885
4411 Automobile Dealers	876	972	178	96	1.22	\$57,982	\$164,500,366
2389 Other Specialty Trade Contractors	821	905	185	84	1.44	\$32,877	\$98,706,124
4481 Clothing Stores	783	693	(66)	(90)	1.36	\$23,543	\$84,350,977
9012 Federal Government, Military	757	780	8	23	0.73	\$42,627	\$231,701,465
6212 Offices of Dentists	735	802	61	67	1.38	\$44,343	\$77,650,800
4922 Local Messengers and Local Delivery	712	969	419	257	14.11	\$25,108	\$51,472,316
8111 Automotive Repair and Maintenance	708	654	(49)	(54)	1.12	\$30,076	\$74,770,256
2373 Highway, Street, and Bridge Construction	579	714	183	136	3.14	\$56,304	\$102,258,760
4431 Electronics and Appliance Stores	571	563	3	(7)	2.07	\$53,795	\$91,896,920
5311 Lessors of Real Estate	569	633	117	64	1.29	\$38,095	\$375,828,470
4522 Department Stores	561	570	(50)	8	0.90	\$23,093	\$39,991,477
6111 Elementary and Secondary Schools	550	650	162	100	0.88	\$39,620	\$32,328,693
6216 Home Health Care Services	548	674	15	127	0.67	\$33,643	\$45,004,774
	56,540	60,740	8,481	4,200		\$45,844	\$12,092,677,236

Source: EMSI Inc.

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.

Total sales of West Kendall's Advanced Industry Sector, at just over \$1 Billion, is only 6 percent of total sales of all businesses in the community, significantly less than the US average. However, total Advanced Industry employment, at 4 percent of total local employment, is slightly ahead of the County, at 3 percent. **Most importantly, West Kendall has a significantly higher composition of Advanced Industry Manufacturing than the rest of the County.**

Advanced Industries Sector		
Services	Employees	Sales
5413 Architecture & Engineering	848	\$155,717,126
5416 Management Consulting	866	\$159,307,009
5415 Computer Systems Design	482	\$100,496,890
5179 Other Telecommunications	16	\$11,111,529
5182 Data Processing & Hosting	107	\$67,923,961
5112 Software Products	12	\$4,315,787
5172 Wireless Telecom Carriers	-	-
5191 Web Search and Internet Publishing	21	\$10,217,738
5417 R&D Services	72	\$14,674,628
2122 Metal Ore Mining	-	-
5174 Satellite Telecommunications	5	\$3,366,299
6215 Medical & Diagnostic Laboratories	70	\$12,693,284
5152 Cable & Other Programming	12	\$20,836,602
Services Totals	2,512	\$560,660,852

Manufacturing	Employees	Sales
3344 Semiconductors	-	-
3345 Precision Instruments	53	\$15,917,473
3341 Computer Equipment	-	-
3339 General Purpose Machinery	-	-
3391 Medical Equipment & Supplies	47	\$7,087,790
3399 Jewelry, Sporting Goods	470	\$94,490,588
3364 Aircraft Products & Parts	5	\$2,399,817
3253 Pesticides & Fertilizers	5	\$5,754,762
3346 Magnetic & Optical Media	-	-
3279 Stone & Mineral Products	5	\$885,019
3333 Commercial & Service Machinery	58	\$16,707,288
3336 Engine & Power Equipment	68	\$28,671,496
3366 Ships & Boats	5	\$1,056,201
3365 Railroad Rolling Stock	-	-
3311 Iron & Steel Products	12	\$7,647,706
3315 Foundries	-	-
3351 Electrical Lighting Equipment	-	-
3313 Aluminum Products	-	-
3271 Clay & Refractory Products	-	-
3342 Communications Equipment	-	-
3241 Petroleum & Coal Products	-	-
3331 Agri., Constr., Mining Machinery	10	\$7,706,323
3251 Basic Chemicals	-	-
3343 Audio & Video Equipment	5	\$1,038,763
3353 Electrical Equipment	25	\$7,302,556
3363 Motor Vehicle Parts	11	\$4,942,273
3361 Motor Vehicles	-	-
3259 Misc. Chemicals	15	\$13,587,483
3369 Misc. Transportation Equipment	37	\$22,616,667
3362 Motor Vehicle Body & Trailers	5	\$1,017,621
3254 Pharmaceuticals	298	\$151,532,662
3359 Misc. Electrical Equipment	-	-
3352 Household Appliances	-	-
3332 Industrial Machinery	-	-
3252 Resins & Synthetic Rubbers	-	-
Manufacturing Totals	1,134	\$390,362,489

Energy	Employees	Sales
2111 Oil & Gas Extraction	-	-
2211 Power Generation & Supply	64	\$64,187,352
	64	\$64,187,352

Advanced Industry totals	3,710	\$1,015,210,693
West Kendall Total	87,766	\$18,387,464,353
Advanced Industry Percentage of Total	4%	6%

A Community of Small Businesses

The vast majority (88.5 percent) of businesses in District 11 have under 10 employees. Only 1.2 percent (89 total) of businesses have greater than 50 employees. Annual sales activity is reflective of the large number of small and micro-businesses in the District with 75 percent (3,648 businesses) generating annual sales of under one million. Only 2 percent (102 total) of businesses generate over 10 million in annual sales.

Establishments and Payroll, 2016	Total in West							Kendall
	33,175	33,177	33,183	33,185	33,186	33,193	33,196	
Number of establishments	1,152	596	739	483	2,780	430	683	6,863
Paid employees for pay period	8,011	4,227	5,786	2,022	23,353	1,609	7,387	52,395
First-quarter payroll (\$1,000)	71,066	26,767	39,025	11,729	203,295	9,529	73,107	434,518
Annual payroll (\$1,000)	302,722	115,210	164,021	52,675	845,170	41,002	298,153	1,818,953

Source: U.S. Census, 2016 Business Patterns

Employee Size	Total in West							Kendall
	33175	33177	33183	33185	33186	33193	33196	
1 to 4 employees	839	436	533	393	1,911	360	513	4,985
5 to 9 employees	166	82	71	44	368	41	69	841
10 to 19 employees	83	42	67	27	240	15	50	524
20 to 49 employees	44	19	36	14	178	9	33	333
50 to 99 employees	12	8	26	3	50	4	7	110
100 to 249 employees	7	8	6	2	26	1	6	56
250 to 499 employees	0	1	0	0	6	0	2	9
500 to 999 employees	0	0	0	0	1	0	2	3
1,000 + employees	1	0	0	0	0	0	1	2
All establishments	1,152	596	739	483	2,780	430	683	6,863

Source: U.S. Census, 2016 Business Patterns

Labor Force Characteristics

West Kendall is home to the County's largest share of the regional labor force. According to 2017 ACS estimates, 187,884 workers age 16 and over live in West Kendall, representing nearly 15 percent of the County's total labor force. An estimated 63.4 percent of West Kendall's working age population are either employed or actively seeking employment, down from 67.3 percent in 2012. However, labor force participation is generally higher than that of Miami-Dade County which was 62.9 percent in 2012 and 62.1 percent in 2017. Labor force participation among West Kendall's Zip Code range from 59.7 percent (33175) to 66.5 percent (33186) in 2017.

West Kendall's unemployment rate was 5.9 percent in 2017, a decrease of 4 percent since 2012. West Kendall has a consistently lower unemployment rate compared to Miami-Dade County, which was 11.2 percent in 2012 and 7.4 percent in 2017.

West Kendall Self-Employment, 2017	Incorporated	Not Incorporated	Total Self-Employment	% of West Kendall Employment
Civilian employed population 16 years and over	10,784	11,069	21,853	12.4%
Agriculture, forestry, fishing and hunting, and mining	48	22	70	8.3%
Construction	1,990	1,919	3,909	33.8%
Manufacturing	476	264	740	10.0%
Wholesale trade	632	244	876	13.0%
Retail trade	982	665	1,647	7.0%
Transportation and warehousing, and utilities	687	692	1,379	9.4%
Information	119	102	221	6.6%
Finance and insurance, and real estate and rental and leasing	1,011	811	1,821	12.1%
Professional, scientific, and management, and administrative and waste management services	2,354	1,986	4,340	20.1%
Educational services, and health care and social assistance	891	1,197	2,088	5.2%
Arts, entertainment, and recreation, and accommodation and food services	672	503	1,175	7.3%
Other services, except public administration	918	2,668	3,585	36.2%
Public administration	0	0	0	0.0%

Source: US Census, ACS, 2017 5-Year Estimates

Educational Attainment

West Kendall's workers are highly educated, with high school, college and higher graduation rates far exceeding the Miami-Dade County average.

Educational Attainment of the Labor Force	Total in West Kendall	Percent	% in Miami-Dade
Less than high school graduate	11,877	5.9%	9.1%
High school graduate or equivalent	39,514	19.8%	12.2%
Some college or associate's degree	53,086	26.6%	16.2%
Bachelor's degree of higher	54,480	27.3%	14.4%
Total Population 25 to 64 years old	199,802		13.4%

Source: US Census, ACS, 2017 5-Year Estimates

Resident Employment by Industry

Most parts of the County tend to specialize in select industries, and develop a local industry structure different than the rest of the County. In West Kendall, however, the industries in which its residents are employed completely mirror the County.

Resident Employment by Industry, 2017	West Kendall		Miami-Dade County	
Civilian employed population 16 years and over	176,750		1,272,735	
Educational services, and health care and social assistance	40,052	23%	252,739	20%
Retail trade	23,380	13%	156,449	12%
Professional, scientific, and administrative and waste management	21,550	12%	164,530	13%
Arts, entertainment, and recreation, and accommodation and food ser	16,026	9%	145,040	11%
Finance and insurance, and real estate and rental and leasing	15,009	8%	97,119	8%
Transportation and warehousing, and utilities	14,608	8%	96,852	8%
Construction	11,573	7%	95,264	7%
Other services, except public administration	9,916	6%	79,606	6%
Manufacturing	7,383	4%	57,907	5%
Wholesale trade	6,761	4%	49,068	4%
Public administration	6,284	4%	43,027	3%
Information	3,367	2%	26,374	2%
Agriculture, forestry, fishing and hunting, and mining	841	0%	8,760	1%

Resident Employment by Occupation

Despite the presence of manufacturing, professional services, and health care jobs in West Kendall, its residents are overwhelmingly employed in service, retail, food service occupations, and laborers.

Additionally, under current conditions, this may remain the case, as occupations forecast to grow the most through 2024 include:

- Farmworkers and Laborers, Crop, Nursery, and Greenhouse
- Registered Nurses
- Construction Laborers
- Janitors and Cleaners, Except Maids and Housekeeping Cleaners
- Combined Food Preparation and Serving Workers, Including Fast Food
- Light Truck or Delivery Services Drivers
- Waiters and Waitresses
- Maids and Housekeeping Cleaners
- Heavy and Tractor-Trailer Truck Drivers
- Maintenance and Repair Workers, General
- Cooks, Restaurant

Employment by Occupation - Leading Occupations

SOC	Description	2018 Resident Workers	Median Annual Earnings	2018 Location Quotient	2018 Jobs	2024 Jobs	2018-2024 Job Growth	2018 Net Commuters
41-2031	Retail Salespersons	6,496	\$21,275.82	1.39	3,378	3,466	89	(3,118)
29-1141	Registered Nurses	4,049	\$64,317.48	1.45	2,325	2,633	308	(1,724)
43-9061	Office Clerks, General	3,941	\$28,239.15	1.05	1,905	1,963	58	(2,036)
41-2011	Cashiers	3,934	\$19,400.83	1.35	2,575	2,595	19	(1,359)
43-4051	Customer Service Representatives	3,875	\$30,291.63	0.98	1,485	1,524	39	(2,390)
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Ex	3,180	\$33,943.22	1.01	1,447	1,454	7	(1,733)
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	2,969	\$19,201.21	0.99	1,969	2,151	182	(1,000)
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	2,952	\$21,742.39	1.31	1,831	2,053	222	(1,121)
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	2,901	\$28,234.01	0.65	991	1,084	93	(1,910)
43-5081	Stock Clerks and Order Fillers	2,879	\$23,158.51	1.54	1,721	1,809	88	(1,158)
35-3031	Waiters and Waitresses	2,501	\$21,796.96	1.01	1,432	1,572	140	(1,069)
41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical	2,216	\$45,738.61	1.17	901	867	-34	(1,315)
33-9032	Security Guards	2,118	\$22,194.93	1.49	967	993	26	(1,151)
53-3032	Heavy and Tractor-Trailer Truck Drivers	2,107	\$35,808.02	0.94	1,034	1,143	109	(1,073)
37-2012	Maids and Housekeeping Cleaners	1,987	\$22,431.22	1.48	1,210	1,332	123	(777)
43-1011	First-Line Supervisors of Office and Administrative Support Workers	1,909	\$51,836.47	1.02	827	865	38	(1,082)
11-1021	General and Operations Managers	1,783	\$102,000.49	0.72	887	976	89	(896)
43-3031	Bookkeeping, Accounting, and Auditing Clerks	1,773	\$37,168.88	0.95	876	904	28	(897)
43-4171	Receptionists and Information Clerks	1,705	\$27,151.93	1.32	774	829	56	(931)
25-1099	Postsecondary Teachers	1,689	\$65,324.59	0.27	218	263	45	(1,471)
13-2011	Accountants and Auditors	1,672	\$59,722.94	1.04	792	851	59	(880)
47-2061	Construction Laborers	1,634	\$25,829.43	1.90	1,438	1,705	267	(196)
49-9071	Maintenance and Repair Workers, General	1,577	\$32,731.38	1.05	869	973	104	(708)
41-1011	First-Line Supervisors of Retail Sales Workers	1,576	\$38,504.02	1.23	935	961	25	(641)
39-9011	Childcare Workers	1,496	\$19,017.82	1.69	1,091	1,153	62	(405)
31-1014	Nursing Assistants	1,478	\$24,231.89	0.95	763	822	59	(715)
53-3033	Light Truck or Delivery Services Drivers	1,455	\$29,655.23	1.52	786	929	142	(669)
35-2014	Cooks, Restaurant	1,444	\$27,181.57	1.23	878	981	103	(566)
41-3099	Sales Representatives, Services, All Other	1,322	\$41,867.62	0.90	541	575	34	(781)
13-1199	Business Operations Specialists, All Other	1,262	\$63,550.50	1.10	622	653	31	(640)
31-9092	Medical Assistants	1,261	\$30,788.06	1.29	480	563	83	(781)
47-2031	Carpenters	1,238	\$27,776.98	1.81	1,055	1,145	91	(183)
37-3011	Landscaping and Groundskeeping Workers	1,220	\$23,639.16	1.30	909	904	-5	(311)
41-3021	Insurance Sales Agents	1,202	\$57,368.91	1.02	458	506	49	(744)
23-1011	Lawyers	1,160	\$107,357.74	0.81	360	390	29	(800)
25-2031	Secondary School Teachers, Except Special and Career/Technical Educ	1,102	\$48,398.73	0.20	110	127	17	(992)
35-2021	Food Preparation Workers	1,029	\$22,446.67	1.42	664	704	40	(365)
TOTAL		80,094			41,506	44,418	2,912	(38,588)
% West Kendall		49%			47%	47%	44%	50%

Source: Emsi, Inc., 2019

Occupations with the Largest Projected Growth

SOC	Description	2018 Resident Workers	Median Annual Earnings	2018 Location Quotient	2018 Jobs	2024 Jobs	2018-2024 Job Growth	2018 Net Commuters
45-2092	Farmworkers and Laborers, Crop, Nursery, and Greenhouse	804	\$19,592.76	7.08	2,512	2,954	442	1,708
29-1141	Registered Nurses	4,049	\$64,317.48	1.45	2,325	2,633	308	(1,724)
47-2061	Construction Laborers	1,634	\$25,829.43	1.90	1,438	1,705	267	(196)
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	2,952	\$21,742.39	1.31	1,831	2,053	222	(1,121)
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	2,969	\$19,201.21	0.99	1,969	2,151	182	(1,000)
53-3033	Light Truck or Delivery Services Drivers	1,455	\$29,655.23	1.52	786	929	142	(669)
35-3031	Waiters and Waitresses	2,501	\$21,796.96	1.01	1,432	1,572	140	(1,069)
37-2012	Maids and Housekeeping Cleaners	1,987	\$22,431.22	1.48	1,210	1,332	123	(777)
53-3032	Heavy and Tractor-Trailer Truck Drivers	2,107	\$35,808.02	0.94	1,034	1,143	109	(1,073)
49-9071	Maintenance and Repair Workers, General	1,577	\$32,731.38	1.05	869	973	104	(708)
35-2014	Cooks, Restaurant	1,444	\$27,181.57	1.23	878	981	103	(566)
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	2,901	\$28,234.01	0.65	991	1,084	93	(1,910)
47-2031	Carpenters	1,238	\$27,776.98	1.81	1,055	1,145	91	(183)
11-9199	Managers, All Other	829	\$38,239.47	1.35	646	736	90	(183)
11-1021	General and Operations Managers	1,783	\$102,000.49	0.72	887	976	89	(896)
41-2031	Retail Salespersons	6,496	\$21,275.82	1.39	3,378	3,466	89	(3,118)
43-5081	Stock Clerks and Order Fillers	2,879	\$23,158.51	1.54	1,721	1,809	88	(1,158)
31-9092	Medical Assistants	1,261	\$30,788.06	1.29	480	563	83	(781)
49-9051	Electrical Power-Line Installers and Repairers	108	\$44,629.07	1.92	121	199	78	13
41-9022	Real Estate Sales Agents	621	\$37,336.27	2.12	486	562	76	(135)
39-9021	Personal Care Aides	537	\$22,927.22	0.26	330	397	67	(207)
11-9141	Property, Real Estate, and Community Association Managers	522	\$40,863.90	2.40	368	433	64	(154)
47-1011	First-Line Supervisors of Construction Trades and Extraction Workers	720	\$55,960.90	1.61	589	651	63	(131)
47-2152	Plumbers, Pipefitters, and Steamfitters	419	\$34,987.86	1.32	360	422	62	(59)
39-9011	Childcare Workers	1,496	\$19,017.82	1.69	1,091	1,153	62	(405)
11-9021	Construction Managers	640	\$44,810.01	2.32	543	603	60	(97)
13-2011	Accountants and Auditors	1,672	\$59,722.94	1.04	792	851	59	(880)
31-1014	Nursing Assistants	1,478	\$24,231.89	0.95	763	822	59	(715)
47-2073	Operating Engineers and Other Construction Equipment Operators	264	\$36,287.35	1.12	237	295	59	(27)
43-9061	Office Clerks, General	3,941	\$28,239.15	1.05	1,905	1,963	58	(2,036)
TOTAL		53,284			33,027	36,558	3,531	(20,257)
% West Kendall		32%			38%	39%	54%	26%

Source: Emsi, Inc., 2019

Resident Earnings

Despite high levels of employment in lower-wage service sector occupations, West Kendall's residents earn slightly more, on average, than workers in the same occupations across the rest of the County. The median wage for all workers in West Kendall in 2017 was \$33,561, compared to \$29,777 for workers across the County.

The predominance of low-wage occupation employment is structural within West Kendall, as it is in Miami- Dade County. An estimated 66 percent of workers in West Kendall and 68 percent of all workers in Miami-Dade earn less than \$50,000 per year, and only 125 percent earn more than \$75,000 per year. **Clearly, there is a mismatch between the higher paying jobs available within West Kendall, and the skills of its resident workers, as West Kendall residents are for the most part only partially filling the community's highest paying occupations.**

Only 8 of the community's top 37 occupations pay a median wage of \$50,000 or more per year. The highest earning occupations in the community are overwhelmingly anchored in the medical and health services sectors. West Kendall's highest earning occupations include:

- Anesthesiologists
- Nurse Anesthetists
- Family and General Practitioners
- Surgeons
- Physicians and Surgeons, All Other
- Chief Executives
- Airline Pilots, Copilots, and Flight Engineers
- Judges, Magistrate Judges, and Magistrates
- Pediatricians, General
- Air Traffic Controllers

	West Kendall Median Earnings	Miami-Da Median Earnings
Median Income by Industry, 2017		
Transportation and warehousing, and utilities	\$51,276	\$51,223
Other services, except public administration	\$42,123	\$42,409
Professional, scientific, and management, and administrative and waste management services	\$41,202	\$41,190
Retail trade	\$40,820	\$33,961
Finance and insurance, and real estate and rental and leasing	\$35,778	\$30,768
Information	\$34,613	\$36,130
Manufacturing	\$33,416	\$32,193
Educational services, and health care and social assistance	\$31,318	\$28,494
Wholesale trade	\$30,261	\$26,455
Agriculture, forestry, fishing and hunting, and mining	\$24,162	\$21,452
Arts, entertainment, and recreation, and accommodation and food services	\$22,278	\$20,462
Construction	\$20,991	\$18,350
Public administration	\$20,726	\$19,097
Median Earnings for all Occupations	\$33,561	\$29,777

Source: US Census, ACS, 2017 5-Year Estimates

May 2017: Median Hourly Wage	Miami-Miami Beach-		
	Kendall MSA	Florida	USA
11-0000 Management	\$48.02	\$45.53	\$49.32
13-0000 Business and Financial Operations	\$30.23	\$29.05	\$32.55
15-0000 Computer and Mathematical	\$34.00	\$34.46	\$40.66
17-0000 Architecture and Engineering	\$31.09	\$32.61	\$38.07
19-0000 Life, Physical, and Social Science	\$33.02	\$26.35	\$31.01
21-0000 Community and Social Service	\$19.58	\$18.97	\$21.08
23-0000 Legal	\$34.75	\$31.12	\$38.50
25-0000 Education, Training, and Library	\$22.65	\$21.49	\$23.43
27-0000 Arts, Design, Entertainment, Sports, and Media	\$22.97	\$20.55	\$23.19
29-0000 Healthcare Practitioners and Technical	\$29.46	\$28.69	\$31.14
31-0000 Healthcare Support	\$13.11	\$13.40	\$13.80
33-0000 Protective Service	\$14.80	\$16.69	\$19.01
35-0000 Food Preparation and Serving Related	\$10.10	\$10.14	\$10.53
37-0000 Building and Grounds Cleaning and Maintenance	\$10.61	\$11.22	\$12.32
39-0000 Personal Care and Service	\$10.92	\$10.87	\$11.35
41-0000 Sales and Related	\$12.39	\$12.14	\$12.99
43-0000 Office and Administrative Support	\$15.21	\$15.23	\$16.70
45-0000 Farming, Fishing, and Forestry	\$9.51	\$10.29	\$11.73
47-0000 Construction and Extraction	\$17.68	\$17.48	\$21.51
49-0000 Installation, Maintenance, and Repair	\$18.48	\$18.60	\$21.40
51-0000 Production	\$12.75	\$14.53	\$16.34
53-0000 Transportation and Material Moving	N/A	\$13.79	\$15.19
All Occupations	\$16.29	\$16.07	\$18.12

Source: Bureau of Labor Statistics, Labor force by County, 2017 Annual Averages

Worker Earnings	Total in West							Kendall	Miami-Dade Benchmarks
	33175	33177	33183	33185	33186	33193	33196		
Full-time, year-round workers with earnings	20,931	20,819	15,590	13,188	27,191	20,909	20,015	138,643	950,506
\$1 to \$9,999 or less	1.6%	1.7%	1.8%	1.0%	1.4%	1.9%	1.5%	1.6%	2.1%
\$10,000 to \$14,999	7.6%	4.6%	6.0%	3.4%	4.0%	8.5%	3.5%	5.4%	7.1%
\$15,000 to \$24,999	19.8%	21.0%	20.4%	14.8%	15.5%	21.3%	16.1%	18.4%	21.5%
\$25,000 to \$34,999	21.5%	22.5%	19.5%	17.8%	14.1%	19.6%	19.1%	19.0%	19.1%
\$35,000 to \$49,999	21.1%	22.6%	21.8%	18.2%	22.4%	21.8%	22.8%	21.8%	18.7%
\$50,000 to \$64,999	11.2%	13.8%	13.3%	18.1%	16.4%	12.0%	14.7%	14.1%	11.5%
\$65,000 to \$74,999	4.6%	3.9%	4.5%	7.3%	6.8%	4.1%	6.1%	5.3%	4.4%
\$75,000 to \$99,999	6.7%	5.7%	6.0%	8.1%	9.0%	5.5%	8.6%	7.2%	6.3%
\$100,000 or more	5.8%	4.1%	6.7%	11.2%	10.4%	5.4%	7.6%	7.3%	9.1%
Median earnings	\$34,635	\$35,053	\$35,977	\$45,420	\$43,259	\$33,941	\$40,648	\$35,977	\$35,094
Worker earnings \$50,000 or less	71.6%	72.5%	69.5%	55.2%	57.4%	73.0%	62.9%	66.1%	68.6%
Worker earning \$75,000 or more	12.5%	9.8%	12.7%	19.4%	19.4%	10.9%	16.3%	14.4%	15.5%
75/50 Ratio	0.2	0.1	0.2	0.4	0.3	0.1	0.3	0.2	0.2

Source: US Census, ACS, 2017 5-Year Estimates

Household Income and Income Inequality

Household incomes, despite occupational employment in lower-wage jobs, due to the presence of multiple wage earners, and the concentration of high-income households in select neighborhoods, is higher across West Kendall than Miami-Dade County. Median household income in west Kendall, at \$55,441, is more than 19 percent higher than the median for Miami-Dade (\$46,338). Median Household Incomes among West Kendall Zip Codes range from a low of \$51,582 to a high of \$80,429.

A More Income Balanced Community

Additionally, income disparity between households at the top of the income ladder is significantly less in West Kendall than it is in the County. The **95/20** ratio compares the average income of households in the top 5 percent of income to the average income of households in the bottom 20 percent (quintile) of income. ***Miami-Dade County has one of the highest levels of income inequality in the US. Households in the top 5 percent of income earn more than 41 times the amount of households in the bottom 20 percent. However, the 95/20 ratio for West Kendall is only 16.5, and while Miami-Dade's 95/20 ratio continues to climb, income inequality across West Kendall remains flat.***

Lastly, the Gini index, another measure of income inequality, where a measure of 1 indicates 100 percent income inequality, and a measure of 0 means complete income equality, also indicates West Kendall's more balanced income distribution structure. All zip codes across the community have a GINI index below .45, with most below .40, compared to Miami-Dade County at .53, and the US at .48.

Mean Household Income of Quintiles - Benchmarks						
Quintile Means	Miami-Dade County		Florida		United States	
	2012	2017	2012	2017	2012	2017
Lowest Quintile	9,181	9,524	11,300	11,863	11,963	12,730
Second Quintile	24,888	26,345	28,877	30,889	31,461	34,103
Third Quintile	43,829	46,639	47,572	51,101	53,304	58,082
Fourth Quintile	71,924	77,411	74,442	80,628	83,952	92,190
Highest Quintile	179,170	200,891	170,805	190,482	184,488	209,307
Top 5 Percent	341,227	392,062	313,135	355,610	325,541	376,587
95/20 Ratio	37.2	41.2	27.7	30.0	27.2	29.6

Source: US Census, ACS, 2017 5-Year Estimates

Household and Family Income, 2017										
Income								Total West	% of Total	
	33175	33177	33183	33185	33186	33193	33196	Kendall	Households	Miami-Dade
Total households	15,300	14,394	11,938	8,052	21,505	14,383	13,241	98,813		858,289
Less than \$10,000	844	628	795	223	1,214	624	479	4,807	4.9%	9.9%
\$10,000 to \$14,999	865	725	510	196	625	750	344	4,015	4.1%	6.4%
\$15,000 to \$24,999	1,753	1,396	1,086	433	1,586	1,616	1,063	8,933	9.0%	12.2%
\$25,000 to \$34,999	1,911	1,394	1,245	487	1,503	1,370	909	8,819	8.9%	10.6%
\$35,000 to \$49,999	2,041	2,333	1,812	734	2,921	2,191	1,489	13,521	13.7%	13.8%
\$50,000 to \$74,999	2,588	2,857	2,342	1,674	4,177	2,957	2,552	19,147	19.4%	16.4%
\$75,000 to \$99,999	2,043	1,756	1,386	1,121	3,139	1,985	2,175	13,605	13.8%	10.2%
\$100,000 to \$149,999	1,784	2,416	1,871	1,883	3,974	1,775	2,636	16,339	16.5%	10.7%
\$150,000 to \$199,999	926	588	454	690	1,562	749	867	5,836	5.9%	4.2%
\$200,000 or more	545	301	437	611	804	366	727	3,791	3.8%	5.4%
Median household income	\$51,582	\$55,444	\$53,546	\$80,429	\$64,907	\$54,132	\$73,382	\$55,444		\$46,338
Family income	12,305	12,240	9,410	7,010	16,465	12,417	11,211	81,058		585,476
Less than \$10,000	435	448	424	81	499	442	210	2,539	3.1%	5.6%
\$10,000 to \$14,999	487	490	290	129	360	758	257	2,771	3.4%	4.9%
\$15,000 to \$24,999	1,285	1,154	793	324	972	1,320	806	6,654	8.2%	11.7%
\$25,000 to \$34,999	1,551	1,351	997	450	1,010	1,128	777	7,264	9.0%	11.0%
\$35,000 to \$49,999	1,694	1,959	1,377	605	2,168	2,106	1,216	11,125	13.7%	14.6%
\$50,000 to \$74,999	2,176	2,348	1,852	1,450	3,576	2,244	2,246	15,892	19.6%	17.2%
\$75,000 to \$99,999	1,793	1,637	1,225	1,030	2,278	1,748	1,971	11,682	14.4%	11.1%
\$100,000 to \$149,999	1,574	2,088	1,692	1,751	3,499	1,682	2,245	14,531	17.9%	12.4%
\$150,000 to \$199,999	799	522	432	637	1,372	634	807	5,203	6.4%	4.9%
\$200,000 or more	511	243	328	553	731	355	676	3,397	4.2%	6.4%
Median family income	\$56,640	\$56,450	\$58,892	\$83,855	\$71,064	\$54,218	\$76,118	\$58,892		\$80,671

Source: US Census, ACS, 2017 5-Year Estimates

Mean Household Income of Quintiles, 2017																
Quintile Means	33175		33177		33183		33185		33186		33193		33196		West Kendall	
	2012	2017	2012	2017	2012	2017	2012	2017	2012	2017	2012	2017	2012	2017	2012	2017
Lowest Quintile	\$12,446	\$13,426	\$14,620	\$15,126	\$12,763	\$13,170	\$20,387	\$22,578	\$15,339	\$15,789	\$12,982	\$14,545	\$16,734	\$18,559	\$14,620	\$15,126
Second Quintile	\$31,462	\$30,678	\$36,160	\$35,732	\$34,059	\$34,543	\$48,294	\$54,904	\$40,932	\$42,070	\$29,080	\$34,103	\$39,609	\$46,590	\$36,160	\$35,732
Third Quintile	\$51,311	\$52,324	\$57,167	\$55,842	\$53,159	\$54,229	\$76,204	\$80,664	\$64,694	\$65,916	\$48,050	\$55,137	\$64,543	\$73,424	\$57,167	\$55,842
Fourth Quintile	\$76,637	\$84,420	\$81,257	\$86,062	\$79,230	\$85,308	\$107,539	\$115,582	\$94,035	\$99,774	\$71,441	\$81,955	\$94,888	\$102,944	\$81,257	\$86,062
Highest Quintile	\$152,204	\$173,279	\$133,204	\$145,603	\$148,163	\$158,922	\$187,197	\$208,810	\$172,953	\$172,270	\$137,640	\$156,339	\$167,359	\$191,911	\$152,204	\$172,270
Top 5 Percent	\$229,665	\$284,417	\$189,469	\$205,476	\$233,800	\$244,485	\$291,042	\$318,897	\$267,702	\$249,537	\$224,684	\$245,986	\$240,129	\$310,290	\$233,800	\$249,537
95/20 Ratio	18.5	21.2	13.0	13.6	18.3	18.6	14.3	14.1	17.5	15.8	17.3	16.9	14.3	16.7	16.0	16.5

Source: US Census, ACS, 2017 5-Year Estimates

Gini Index, 2017	
West Kendall Zip Codes	Gini Index
33175	0.45
33177	0.39
33183	0.42
33185	0.38
33186	0.40
33193	0.42
33196	0.40
Miami-Dade	0.53
Florida	0.49
United States	0.48

Source: US Census, ACS, 2017 5-Year Estimates

Employment Geography

Where Residents Work

Despite recent mobility and office development trends, residents of West Kendall are locked into an out-moded and unsustainable work transportation pattern. Simply put, the number of employed persons living on West Kendall greatly exceeds the number of jobs within West Kendall by 100 percent. As important, West Kendall resident overwhelmingly commute by car each day to points west including the City of Miami, Doral, Coral Gables, and South Miami.

The mismatch between the local jobs and occupations located in West Kendall and its residents represents a completely unsustainable transportation pattern. West Kendall has a net outflow of 85,850 workers per day, and at the same time, an estimated 89.1 percent of West Kendall's local jobs are filled by workers who live outside the area. **Only 4 percent of West Kendall's employed residents (5,430 workers) live and in West Kendall, one of the lowest percentages of all communities in Miami-Dade County.**

This pattern creates some of the area's worst rush-hour congestion, and is responsible for traffic congestion across Miami-Dade County. Most of West Kendall's major roads operate at service levels D or below during rush hour. The community's high rate of commuter work flow is one of its most serious challenges, threatening, the environment, human health, and local funding resources. It also places West Kendall at a growing competitive **disadvantage** to create new jobs.

Means of Transportation to Work, 2017										
	33175	33177	33183	33185	33186	33193	33196	Total in West Kendall	Percent of Miami-Dade	Percent of Florida
Total	26,105	27,561	18,869	15,988	35,850	24,928	24,789	174,090	13.9%	2.0%
Car, truck, or van	24,192	25,505	17,560	14,973	33,201	23,325	22,935	161,691	15.1%	2.0%
Public transportation	314	675	420	106	823	402	640	3,380	5.2%	1.9%
Taxicab	0	0	0	40	0	8	25	73	2.4%	0.6%
Motorcycle	0	16	15	10	10	0	25	76	2.7%	0.3%
Bicycle	10	103	2	12	44	51	86	308	4.1%	0.5%
Walked	133	165	103	2	353	196	124	1,076	4.1%	0.8%
Other means	151	555	192	71	465	98	327	1,859	16.2%	1.9%
Worked at home	1,305	542	577	774	954	848	627	5,627	9.2%	1.1%

Source: US Census, ACS, 2017 5-Year Estimates

2015 Inflow/Outflow Counts	33175	33177	33183	33185	33186	33193	33196	Total in West	Total in Miami-
Employed in Selected Area, Live Outside	5,891	3,107	5,913	1,482	20,107	2,373	5,607	44,480	249,094
Live in Selection Area, Employed Outside	21,141	19,729	14,700	10,910	26,982	18,387	18,481	130,330	203,072
Employed and Live in Selection Area	850	665	467	226	2,235	361	626	5,430	778,547
Net Job Inflow (+) or Outflow (-)	15,250	16,622	8,787	9,428	6,875	16,014	12,874	85,850	46,022

Source: 2015 Longitudinal-Employer Household Dynamics Program Data Note:
Counts using 2015 data (the latest available by LEHD)

2015 Outflow Job Characteristics (Primary Jobs)	Total in West Kendall
External Jobs Filled by Residents	130,330
Workers Aged 29 or younger	26,258
Workers Aged 30 to 54	74,606
Workers Aged 55 or older	29,466
Workers Earning \$1,250 per month or less	22,747
Workers Earning \$1,251 to \$3,333 per month	51,899
Workers Earning More than \$3,333 per month	55,684
Workers in the "Goods Producing" Industry Class	9,446
Workers in the "Trade, Transportation, and Utilities" Industry Class	34,160
Workers in the "All Other Services" Industry Class	86,724
2015 Inflow Job Characteristics (Primary Jobs)	
Internal Jobs Filled by Outside Workers	44,480
Workers Aged 29 or younger	10,448
Workers Aged 30 to 54	24,414
Workers Aged 55 or older	9,618
Workers Earning \$1,250 per month or less	11,189
Workers Earning \$1,251 to \$3,333 per month	20,743
Workers Earning More than \$3,333 per month	12,548
Workers in the "Goods Producing" Industry Class	7,034
Workers in the "Trade, Transportation, and Utilities" Industry Class	12,962
Workers in the "All Other Services" Industry Class	24,484
2015 Interior Job Flow Characteristics (Primary Jobs)	
Internal Jobs Filled by Residents	5,430
Workers Aged 29 or younger	919
Workers Aged 30 to 54	3,037
Workers Aged 55 or older	1,474
Workers Earning \$1,250 per month or less	1,501
Workers Earning \$1,251 to \$3,333 per month	2,476
Workers Earning More than \$3,333 per month	1,453
Workers in the "Goods Producing" Industry Class	798
Workers in the "Trade, Transportation, and Utilities" Industry Class	1,400
Workers in the "All Other Services" Industry Class	3,232

Source: U.S. Census Bureau, On The Map Application and LEHD Origin-Destination Employment Statistics. Latest data available as of 03/04/2019.

Where Workers are Employed - Primary Jobs, 2015

City	Total in West Kendall
Miami city, FL	26,467
Doral City, FL	9,683
Kendall CDP, FL	9,160
Coral Gables city, FL	7,298
Three Lakes CDP, FL	3,563
Hialeah city, FL	2,864
University Park CDP, FL	2,292
The Hammocks CDP, FL	1,745
South Miami city, FL	1,394
Tamiami CDP, FL	1,229
All Jobs (Total)	135,760

Source: U.S. Census Bureau, On the Map Application and LEHD Origin-Destination Employment Statistics. Latest data available as of 03/04/2019.

Where Workers Live - Primary Jobs, 2015

City	Total in West Kendall
The Hammocks CDP, FL	28,791
Kendale Lakes CDP, FL	3,064
Miami city, FL	2,641
Kendall CDP, FL	2,589
Kendall West CDP, FL	2,175
Tamiami CDP, FL	1,908
Richmond West CDP, FL	1,815
South Miami, FL	1,709
Homestead city, FL	1,146
The Crossings CDP, FL	1,084
All Jobs (Total)	49,910

Source: U.S. Census Bureau, On The Map Application and LEHD Origin-Destination Employment Statistics. Latest data available as of 03/04/2019.

Top Commuters by Occupation	#	Net Commuters
Occupation	Workers	
Retail Salespersons	6,505	3,119
Customer Service Representatives	3,832	2,364
Laborers and Freight, Stock, and Material Movers	2,835	1,919
Office Clerks, General	3,635	1,847
Registered Nurses	4,002	1,707
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	2,889	1,566
Post-Secondary Teachers	1,682	1,466
Cashiers	3,922	1,349
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	2,208	1,312
Stock Clerks and Order Fillers	2,851	1,147
Security Guards	2,068	1,117
First-Line Supervisors of Office and Administrative Support Workers	1,879	1,079
Totals:	38,308	19,992

Healthy West Kendall Community Economic Development Strategies: Action Plan Principles

West Kendall, by most measures, is a successful and competitive community. Its strengths include its strong fabric and high percentage of family households, the wide range of skills, occupations and high educational attainment of its residents, and high rates of labor participation, self-employment and entrepreneurship.

West Kendall does, however, face considerable challenges, including:

- A regional economy undergoing a slow-down in population growth and job formation;
- West Kendall developed as a rapidly growing in which home sales and jobs, outside the recession, were plentiful and quickly growing each year. The community enters a period in which growth will be considerably slower, but still faces the possibilities of cyclical job loss;
- A resident labor force that despite higher than average earnings, household income, and educational attainment, has a larger percentage of workers in low-skilled, lower wage occupations whose jobs are overly sensitive to regional economic cycle changes and/or shocks;
- A local economy with a considerable percentage of medical sector businesses and employment, but for the most part is overwhelmingly anchored by retail, personal services, and food service employment. West Kendall's economy is predominantly local, rather than traded economy; and
- West Kendall is home to a major portion of the regional labor force — over 176,000 employed residents live in West Kendall. However, the mismatch between the size of the employed labor force and local jobs availability, combined with a mismatch between the local jobs market and resident skills, means that only 5,430 West Kendall residents actually live and work there. Alternatively, over 130,000 resident workers have jobs outside West Kendall.

Expanding employment opportunities within the District may be most the single important issue facing West Kendall. Placing over 100,000 commuters on the road each day has crucial local and regional negative impacts. It is the major source of the District's transportation congestion, long commute times, and congestion on all major routes leading into and out of the community. This situation is also placing increasing pressure on the regional road network and physical environment. ***Failure to address this issue in the short and long term will negatively affect the District's quality of life, desirability as a place to live, housing market and environmental quality. It is also negatively impacting regional transportation efficiency and the region's ability to effectively compete for firms seeking to relocate into the area.***

Growing a High-Performing West Kendall

The Action Strategies within this Action Plan have been developed in response to the detailed analysis contained in the West Kendall Competitive Assessment and Technical Analysis. Assessing West Kendall's strengths and weaknesses, the Action Strategies have been built on four basic development principles:

A focus on development quality, not quantity: West Kendall's Era of rapid population, employment and physical growth have passed. Its next era of development should focus on improving the quality of its jobs, incomes, public facilities, and quality of life;

Planning for Stable, Sustainable Long-Term Growth: Competitive communities support diversified employment, industry, and occupational growth that is less susceptible to business cycle fluctuations, protecting worker incomes and household wealth during national economic downturns.

Supporting Local Innovation and Growing Global Competitiveness: All economies grow through the expansion of local businesses **and** a steady supply of new businesses to maintain employment. All businesses, even small ones, engage in markets that never stand still. Successful communities support local business capacity to innovate and adopt new technology to improve performance and global competitiveness;

Expanding Economic Opportunity and Upward Mobility: Competitive communities support an expanding supply of jobs and occupations paying competitive wages and skills that provide a platform for upward economic mobility and building household wealth; and

Building Local Human Capital: High performing local economies build the collective knowledge and skills of its **local** labor force to support globally competitive businesses, obtain higher-wage, high-skilled employment opportunities, and adopt to rapidly changing employment markets, technology, and industry changes.

Apply Sustainable Economic Growth Metrics

Simple traditional measures of the **quantity** of jobs created is not enough to maintain competitiveness and West Kendall's economic vibrancy. As such, it is recommended the West Kendall adopt a new set of growth and economic metrics to guide and inform future policy and program development. These **Planning and Management Metrics** would measure local economic conditions, with a focus on

1) "quality" of jobs created — implementing policy that supports the growth of high-wage, high-skill, high-income jobs; and **2) Growing local incomes** — improving the incomes of resident workers and households by providing a steady growing supply of quality jobs, and opportunities to grow training, education and skills to compete for those jobs.

The **Policy Metrics Dashboard** would collect at a minimum the following economic statistics, updated according to the indicated time frequency:

- Population growth, by age group and household income (annual);
- A complete, current database of all businesses located in West Kendall, with contact information and updated bi-annually;
- New business establishment and firm creation and employment growth by establishment size across West Kendall's economy, and by industry sector and occupation, including target clusters, industries and niche sectors (bi-annual);
- Median wages by industry and occupation compared to the County and U.S. (annual);
- Median household income by distribution and year-over year performance (annual);
- Employment, labor participation and unemployment rate (quarterly);
- Educational attainment and age group population trends, especially in the young and mid-worker age segments (20-44, and 45-55 years old, annually);
- Poverty rate (annual);
- 95-20 and 75/50 ratios (annual);
- Increase in tax revenue (quarterly);
- Measuring return on investment from public expenditures in West Kendall (monetary and non-monetary, including job creation, bi-annual);
- Land values, specifically identifying underperforming properties, high crime and distressed properties (bi-annual).

The advantages of adopting, maintaining and **applying** these metrics are as follows:

- Adopting and maintaining a different set of metrics as the basis for and measurement of policy success ensures its programs keep pace with changes in the economy, meet local challenges and build on local strengths cited throughout this study;
- Focusing on the quality of jobs ensures greater upward economic mobility for those at the bottom as higher paying jobs generate greater economic multipliers (local spending and

supporting secondary jobs) than low-wage jobs, and an employment base built on higher-skilled jobs is much more resistant to economic downturns; and

- Clearly setting policy expectations and guidelines that manage growing employment in harmony with West Kendall's quality of life.

Develop Targeted Industry Strategies

It's crucial that programs and policies focus on its local industry strengths to maximize the return on investments, make the most of public resources, and insure that program and policy efforts are focused on sectors that represent "best bets" for creating new businesses and jobs. The following sectors represent West Kendall's strongest local industry clusters, based on a balancing of employment size, local competitive advantage, and wages.

Priority Target Industries								
	2018 Jobs	2024 Jobs	Job Growth 2012-2018	Job Growth 2018-2024	2018 Location Quotient	2018 Wages, Salaries, & Proprietor Earnings	2018 Total Sales	
Traded Industries								
1151	Support Activities for Crop Production	3,763	4,455	1,246	692	14.01	\$27,406	\$139,788,919
2371	Utility System Construction	774	1,246	568	472	2.59	\$62,381	\$176,309,957
5242	Agencies, Brokerages, and Other Insurance Related Activities	947	1,035	259	88	1.12	\$67,663	\$285,635,457
5413	Architectural, Engineering, and Related Services	848	955	184	107	1.01	\$67,874	\$155,717,126
5415	Computer Systems Design and Related Services	482	557	144	74	0.40	\$86,598	\$100,496,890
3399	Other Miscellaneous Manufacturing	470	524	135	54	2.66	\$43,131	\$94,490,588
5419	Other Professional, Scientific, and Technical Services	524	603	125	79	1.10	\$44,889	\$105,797,083
4881	Support Activities for Air Transportation	264	305	51	41	2.19	\$56,096	\$53,094,662
6116	Other Schools and Instruction	594	644	15	49	1.81	\$23,250	\$35,924,824
3254	Pharmaceutical and Medicine Manufacturing	298	257	(10)	(41)	1.87	\$74,897	\$151,532,662
4238	Machinery, Equipment, and Supplies Merchant Wholesalers	687	586	(120)	(101)	1.82	\$65,326	\$172,872,586
Local Industries								
9039	Local Government, Excluding Education and Hospitals	6,305	6,351	167	46	2.05	\$70,929	\$2,158,333,655
6221	General Medical and Surgical Hospitals	5,124	5,545	541	422	2.02	\$66,756	\$958,792,972
2382	Building Equipment Contractors	2,582	2,846	803	264	1.99	\$43,378	\$355,969,241
9011	Federal Government, Civilian	2,443	2,418	49	(25)	1.57	\$89,189	\$3,416,246,626
2361	Residential Building Construction	1,583	1,805	555	222	2.39	\$41,230	\$226,797,963
5313	Activities Related to Real Estate	1,457	1,846	337	389	3.17	\$49,066	\$437,142,036
6211	Offices of Physicians	1,294	1,467	186	173	0.90	\$74,274	\$187,583,913
6212	Offices of Dentists	735	802	61	67	1.38	\$44,343	\$77,650,800
2373	Highway, Street, and Bridge Construction	579	714	183	136	3.14	\$56,304	\$102,258,760

Focus on Small-Firm Growth

Local development policy can be distracted in a search for large employers from outside the area. For West Kendall this strategy is counterproductive for three reasons: 1) It is a low-probability venture, as the relocation of businesses historically accounts for less than three percent of all new job creation, 2) It requires large resources including land, incentives, funding and infrastructure, and 3) most importantly, the backbone of West Kendall's economy (and the County) is built on small businesses employing less than 20 persons, including sole proprietorships.

Supporting the competitive needs and growth of West Kendall's community of small businesses should be a clear strategic priority. Small businesses are West Kendall's most important source of employment and one of its clear competitive advantages. Policies to support small businesses focus on helping them compete in large markets and against large firms. In most cases this takes the form of creating external economies of scale (business services, technical expertise, financing, labor, and access to supply chains) that large firms have internally. Recommended small business support strategies, which can be funded through local, state, federal, and institutional sources include:

- a. Technology and equipment grants and loans, available in increments from \$10,000 up to \$50,000;
- b. Grants, low-interest loans, and/or one-time property tax rebates for new investment in office plant or physical space, up to \$250,000;
- c. Pooled loan programs customized for the needs of small businesses, including different credit requirements, lower guarantee thresholds, use of collateral and business value, as opposed to personal guarantees. Banks such as BankUnited have developed loan products specific to the needs of small businesses, expanding credit access usually reserved for larger businesses;
- d. Access to pooled insurance programs through a single broker that combines purchasing power to deliver lower-cost medical insurance usually available to large firms. Chambers of commerce traditionally have performed this function, but it can be run by any number of intermediary institutions or businesses;
- e. Focusing on the different real estate needs of small businesses, which includes making use of alternative, smaller, or shared spaces, and the needs of home-based businesses. This means a renewed focus on the re-purposing and re-zoning of traditional commercial space in West Kendall including smaller retail plazas, for mixed-use, office, and co- working space;
- f. Access to a low-cost ultra-high-speed internet backbone, again, developed by pooling customers into a single purchasing package to get better pricing and service;
- g. Better local information and networking with other small businesses in West Kendall among lenders, investors, service providers, and technical expertise through a central business information portal, a regular local business “census,” and networking events; and
- h. Enhanced marketing, informing both local businesses and outside business owners and investors of the high quality, sophistication, and diversity of West Kendall’s growing business mix.

Implement Comprehensive Workshifting Strategies

Despite West Kendall’s high proportion of small businesses, too many of its residents still commute to work outside West Kendall, exacerbating traffic congestion, degrading quality of life and the environment. ***West Kendall’s existing commuter pattern is not only unsustainable, but may be the most challenging issue the community faces. Additionally, attempting to solve the problem through transportation infrastructure investments alone (road, rail and bus) may not be effective, and will be prohibitively expensive.***

The practice of employers moving workers out of a central office on a daily basis, making greater use of telecommuting, satellite offices closer to where employees live, co-working, shared, and home office spaces is known as ***workshifting***. Workshifting seeks not to just move workers into mass transit, but reduce commute times, take commuters off the road, reduce traffic volume and increase worker productivity by reducing or eliminating travel times. Telecommuting has the potential to save employers \$10,000 per employee per year due to increased productivity, reduced real estate and facility costs, and reduced turnover. Other benefits include reduced driving cost and time savings for employees, energy savings, reduced congestion and environmental benefits to the society. Lastly, flexible work arrangements are also essential to attract and retain the new generation of labor force.

Given the high percentage of residents who commute in and out of West Kendall, supporting workshifting or adopting formal workshifting incentive programs could have high appeal.

Approximately 31,000 residents of West Kendall currently work in occupations that are amenable to telecommuting or working from satellite, shared, or home office space. An additional number of workers who commute into West Kendall are also in occupations that are amenable to workshifting.

A comprehensive workshifting program is a combination of strategies, including the following:

- A targeted marketing program to large downtown employers about the benefits of workshifting to West Kendall;
- Incentive programs that encourage employers to develop and implement telecommuting programs that allow employees to work remotely instead of commute to the central office daily;
- Grants and/or incentives for the development of co-working space;
- Revising local zoning through density bonuses or parking relief to incentivize small office and co-working spaces, especially West Kendall's existing malls and small retail plazas;
- Revising zoning to incentivize live-work housing units and live-work mixed-use communities in West Kendall; and
- Accelerating access to affordable ultra-high-speed internet connectivity, especially for small businesses.

Each of these programs are discussed in detail below:

1. Stimulate and Incentivize the Immediate Development of Alternative Work Space

Rapidly expanding opportunities to work in West Kendall, rather than commute, is crucial to the community's sustainable future development. Shared and co-working space is one of the hottest real estate development segments in the US market, and the Miami Metro area, due to its high percentage of small businesses, non-employer establishments, high rate of self-employment, and high office rents, has the highest amount of co-working space as a percentage of its total office inventory of any region in North America.

The basic characteristics of West Kendall's population, labor force, long commute times, and real estate market indicate that West Kendall may be one of the best sub-markets to support the rapid development of new co-working space. Capitalizing on local market factors, considerable opportunity exists, at little cost, to provide alternative workspace for existing employers and employees inside West Kendall. Given the high density of workers who use could co-working, shared and satellite office space, significant numbers of workers can be kept within the District in a relatively small amount of office space.

West Kendall needs to immediately stimulate the development of at least 100,000 square feet of shared, satellite, and co-working space over the next 3 years. Development of this space can be stimulated at relatively low cost using the following strategies:

- Grants and/or incentives for the development of co-working space;
- Revising local zoning through density bonuses or parking relief to incentivize small office and co-working spaces.
- A targeted re-zoning program to re-purpose underutilized retail properties for redevelopment as co-working, shared office and satellite office space.

2. *Adopt a Regional Trip Reduction Policy, or Ordinance (TRO)*

Trip Reduction Policy (TRO's) are programs adopted to manage congestion by promoting transportation alternatives to single occupancy driving. TRO's date back to the 1980's and are widely used throughout the US, and can be found in nearly every state. TRO's are used to address congestion and parking issues, air quality issues, and lack of transit improvements or funding. TRO's involve the application of a range of strategies, including parking pricing, transit subsidies, ride-matching, flextime, compressed work weeks, telecommuting, pedestrian and bicycling facilities, incentive programs and marketing trip alternatives.

TRO's can be a mix of requirements and incentives that seek to involve the private sector in transportation demand management. The County has the MOVN information and assistance program, available to employers looking to provide transportation alternatives to employees. Also, the Miami Dade transportation Planning Organization (TPO) noted in a recent study of the region's Transportation Concurrency review system that it contained a number of inefficiencies, including "the assertion that the system is too focused on roadways instead of overall mobility (i.e., a mix of transportation systems available to users)."

A TRO, integrated with Concurrency review could provide a greater mix of alternatives, flexibility, and drive a re-thinking of how large developments support the West Kendall's and regional goal of reducing trips, trip lengths and vehicle-miles traveled, creating more walkable, urbane communities. TRO strategies are also in line with addressing West Kendall's inflow-outflow issues cited in the report.

TRO policy need not be expensive, restrictive or burdensome. The land use and economic development recommendations of this study incorporate trip reduction thinking, in ways that have multiple community benefits.

3. *Drive New Business Creation through Business Accelerators*

Small business growth and new business creation are the keys to West Kendall's economic future, as they 1) expand employment opportunity for local residents, 2) create alternatives for living **and** working in West Kendall, and 3) drive the community's next wave of local entrepreneurs.

West Kendall is extremely well-positioned to host new business accelerator development given its high proportion of small business, highly educated resident labor force, high rate of self-employment, and high new business growth rate. West Kendall should encourage the creation of 50,000 square feet of new accelerator space focusing on target industry clusters by:

- Partnering with local universities, institutions, venture capital and experienced accelerator and incubator operators to develop and run **private** business accelerator(s);
- Revise local land use and zoning to facilitate the re-purposing of existing commercial properties to support more general office and accelerator development through conversion of older spaces, and provide density bonuses or parking relief to incentivize accelerator development;

- Develop business accelerators focusing on the businesses either entering or **servicing** the West Kendall target industries, which increases the growth and survival rate of companies “graduating” from these incubator/accelerator
- Seek specific opportunities to create accelerators that leverage local major economic development assets, including West Kendall’s health care complex, and accelerators either located at, or leveraging Tamiami Airport, supporting the development of businesses in avionics, aviation components, electronics, and communications manufacturing.

4. Implement a Small Business Technology Innovation Grant Program

Continuous innovation, even in mature industries, is a hallmark of local economic competitiveness. This study recommends establishing a grant program to help underwrite the cost of investments in new technology for small firms. A matching fund providing up to \$50,000 per applicant business, managed by the County, could have far-reaching impacts on the development and growth of local small businesses employment. Tied to a Community Benefits Agreement, the program could drive new jobs for West Kendall residents.

5. Invest in an Ultra-High-Speed Internet Backbone

The development of ultra-high-speed Internet connectivity overlaps across a number of the strategy areas, but is important enough to receive special attention as a central development strategy. Investing in an “ultra-high-speed Internet backbone” would be an important, critical and effective business infrastructure investment in West Kendall. Affordable, widely used Gigabit and higher speed internet service has been slow to emerge in South Florida. Supporting, subsidizing, investing in, or partnering to provide this backbone would provide an immediate small business development and growth incentive allowing high-speed service at costs businesses can afford. It would also support the growth of numerous tech sector industries, most notably, strong local clusters of telecommunications, live data services, software development, and medical services and diagnostics. It also supports workshifting.

6. Link Residents with New Employment Opportunities & Job Training

Matching West Kendall residents with local job opportunities is both a critical need and immediate opportunity for the community. Three programs can be developed and implemented to both prepare residents to compete for new job opportunities, and connect them with new jobs as they emerge:

- A survey of employers across West Kendall to assess their hiring plans, occupational, and skill requirements for new jobs;
- Partner with Miami-Dade College and CareerSource South Florida to create targeted training programs addressing market area hiring needs;
- Conduct regular job fairs as needed to connect local residents to new businesses.

Implement a Buy Local Program with Local Large Businesses

Many communities have focused efforts on their local large businesses to **buy local**, with benefits including not just new jobs, but supporting new business creation, increasing local incomes, spending, and fueling new household medical, goods and services spending.

West Kendall's local Medical and Health Services Cluster generates over \$1.75 Billion in annual spending and sales. Each year hospitals, medical labs, physicians, and clinics, in west Kendall spend on everything from medical devices, implements, food, linens, clothing,

cleaning, disposal and a host of other daily needs. This spending represents a considerable pool of spending that if directed toward a preferred local purchase program, could support a large number of small firms and support local income and employment.

West Kendall can aggressively pursue development of a local purchase program with business within the community including medical sector businesses, manufacturing, crop production, and food processing. The practice has become so popular that a pool of experienced consultant firms who specialize in the development and management of these programs has grown in response to demand.

Leverage Hospital and Medical Cluster Hiring to Benefit Local Workers

Similar to local spending, West Kendall's Medical Cluster is its largest employment cluster. Many of the jobs created in the local medical and Health Services Cluster, however, are filled by workers from outside West Kendall, as evidenced by the worker commuter analysis.

The Health Services Cluster, because of its size, and complement of larger size firms and employers should be seen as a major asset for providing a wide range of employment with possibilities for rapidly increasing skills and pay. A Health Service Sector training, education, and local hiring program, focused on preparing West Kendall residents to take jobs in the expanding Health Cluster would include the following elements:

- Completing a Health Cluster Employer survey, to assess their short- and long-term hiring needs, skills, and qualifications;
- Developing focused training and educational programs for West Kendall residents;
- Developing specialized Health Sector educational programs in West Kendall's local public Schools, beginning at the Middle School level;
- Developing an employer-potential employee hiring portal through social media or a dedicated web site. This service might be included as part of the B2B networking program and platform recommended above; and
- Negotiating a local hiring pledge with West Kendall's major Health Sector employers, including opportunities for internships, job shadowing, training, and eventual job placement for West Kendall residents.

Aggressively Expand Local Business-to-Business Networking Programs

West Kendall depends on its small business community, which has a mix of large and small business in diverse industries, serving local, national and international customer markets. Small businesses utilize networks of local partners to extend their capabilities and outcompete larger firms. This report recommends the development of a **central business information portal**, to improve local information sharing and networking between small businesses, lenders, investors, service providers and technical expertise.

The portal can be a social media communications platform with the goal of reaching and/or engaging every local business and as a platform that can be used for other Healthy West Kendall Strategies.

Re-Think New and Future Development Patterns

Scarce land availability relative to long-term demand, transportation congestion, low walkability across the West Kendall, demand a re-thinking of immediate and long-term development patterns. In particular, the development of low-density single-family housing, and retail, if continued, may exacerbate negative conditions within West Kendall.

New development needs to be considered based on different metrics, including: 1) reducing traffic congestion and overload of the road network due to work and non-work travel patterns, 2) developing a pedestrian and bike friendly community, and 3) meet resident desires to use local mass transit as a travel alternative. Initiatives to immediately address these issues include:

Consider Re-Zoning for High Density Mixed-Use and Live-Work Development at Selected Locations in the District: New development and redevelopment of West Kendall's central corridors should be re-zoned to require and incentivize a mix of high density residential (125 dwelling units per acre), retail, and employment generating uses. In addition, the County zoning ordinances for these locations should include and promote work-live space, and enhanced connections to rapid transit including bus, train and dedicated trolleys. Zoning can be structured as a mix of requirements and incentives to support new forms of more *urbane, walkable, and connected communities*. This re-zoning could be accomplished by expanding the Miami-Dade Comprehensive Development Master Plan (CDMP) recommended Regional and Metropolitan Centers to include **Urban Corridors** that link the North, Central and South West Kendall; and

Re-Zone and re-plan for New Town Centers: Two of West Kendall's largest developable properties — The Palms at Town and Country (at Kendall Drive and the Turnpike), and the Howard Hughes Corporation Kendall Town Center (at Kendall Drive and 162nd Avenue) — have been designated under the CDMP for large urban Center development treatment. Both properties are ideally situated to serve as a Town Centers incorporating new residential, retail, employment and entertainment uses for the entire District. Proper development of these two properties could significantly further many of the development goals of this Strategic Plan — reducing work related commuter vehicle trips out of the District, non-work trips, and provide new lifestyle amenities. Their development as such should be supported and incentivized due to their potential benefits to the Community.

Consider Incremental Approaches to Major Transportation Capacity Investments

Neither asphalt nor public transit alone will solve West Kendall's growing transportation issues. The TPO and County have proposed the Strategic Miami Area Rapid Transit (SMART) Plan — a proposal to expand the County's light rail system to include new north-south and east-west connectors, including a new corridor linking West Kendall with Downtown.

However, the SMART Plan is not funded, and its development could be a decade or more in the future. Additionally, with limited land area to add new vehicle lanes, the solution to West Kendall's transportation issues will involve a combination of:

- Efficient, low-impact capacity expansion
- Land use changes;
- Increasing alternative, local work locations; and
- Expanding mobility options focusing on internal non-vehicular and shared circulation patterns.

Targeted Density Increases

As people and talent are attracted to the economic opportunities, accessibility to work and entertainment, and other lifestyle factors offered by many urban areas, suburban areas like the West Kendall can benefit by incorporating some of these same factors into their community and economic development strategies. Some suburbs are starting to incorporate higher densities and more urban principles into their designs. As Steve Yoder wrote in *The Fiscal Times* regarding the growth of Bellevue, Washington, "Not long ago, density, walkability and access to public transit were more associated with cities than suburbs. But as more people flock to the cities, and many outer suburbs struggle, some suburbs have found a formula that's helped them grow as fast as their urban siblings—create a downtown core that lets them combine the city's culture, street life and walkability with their own lower crime rates and good public services." Creating a higher population density in a suburban community like West Kendall can help create a stronger and more competitive economy.

Increased density has also been linked to increased productivity. The Federal Reserve Bank of New York's 2010 report, "[Productivity and the Density of Human Capital](#)," (PDF) reviewed 363 metropolitan areas in the U.S. from 2001 to 2005 to better understand how density affects an area's productivity. Although this report reviewed metropolitan areas, many of the findings may be applicable to smaller communities, especially those with higher-than-average densities. The New York Fed found that if a metropolitan area doubled its population density, its human capital increased, leading to an average 2 to 4 percent increase in productivity. The sectors most dramatically affected by increases in density were more knowledge-based, relying on an educated workforce where sharing ideas is important to productivity. Sectors with the highest productivity gains were professional services, arts and entertainment, information, and finance. Although the study used metropolitan areas as the sample, it demonstrates that increasing density can lead to positive economic gains in more suburban locations such as West Kendall.

Strategies communities like West Kendall can implement to improve density include:

- Create planning and zoning that specifically targets areas of a community for population, housing and/or business growth (and/or change ordinances to allow higher-density structures);
- Locate new or existing community services or institutions in a certain geographic area (hospitals, schools, libraries, health care clinics, post offices, utility companies, other governmental institutions or services that people need access to);
- Offer housing options of different sizes and prices, a mix between ownership and rentals, and variances in styles that will appeal to a large cross-section of people (singles, young families, retirees, etc.);
- Types of housing to consider could include condominiums, cottages, town homes, single-family houses, cooperative housing, senior living facilities and other types that appeal to multiple generations and incomes.
- Utilize tax incentives to develop, redevelop or improve a specific geographic area of a community to entice more people to live there.
- Create shared amenities and public spaces for common use. These spaces should:
 - promote human contact and social activities;
 - be safe, welcoming and accommodating for all users;
 - have design and architectural features that are visually interesting;
 - promote community involvement;
 - reflect the local culture or history;
 - relate well to bordering uses;
 - be well maintained and have a unique or special character, and
 - Ensure connectivity and accessibility to population center (walking, biking, and driving).

Link Affordable Housing to Economic Development and Business Creation

Given West Kendall's industry composition and small business structure, the CEDS economic and housing strategies can be mutually reinforcing – by both supporting business development, and in turn, improving investments in its existing and new housing stock.

The availability of a range of affordable housing options is one of the most important economic development issues facing communities. The high rate of resident turnover, the loss of professionals, skilled workers, and key wage earners at or below the median income will have damaging local economic effects. Providing housing for a mix of income groups and retains and attracts workers across the income and skill spectrum is a key to building a self-sustaining economy less susceptible to regional and national cyclical market swings. A spectrum of housing choice and opportunity also helps maintain a steady stream of new small businesses, entrepreneurs and jobs required to sustain a healthy local economy.

Creating new opportunities for better paying jobs and higher household incomes is also the key to solving a community's long-term affordable housing issues. Implementing an

affordable housing program should, therefore, be an opportunity to accomplish the multiple goals of affordable housing delivery and new job creation. Affordable housing, when paired with traditional economic development and business development incentives, becomes an especially potent new business creation incentive package.

Most communities are reliant on the growth and development of small business for new job creation. Examples of blended housing and economic development programs could include:

1. A skilled trade contractor on-site job training, mentorship and licensing and certification assistance program to expand the pool of local skilled trades contractors;
2. Offering housing incentives to entrepreneurs and business owners who create a minimum of three new full-time jobs that pay salaries above the median income. Assistance could be in the form of home purchase assistance (grants, low interest loans, down payment assistance, etc.), or rental assistance through a community's affordable housing agency or through a separate rental assistance program. A unique program such as this would be a powerful incentive to both local entrepreneurs and those from outside the region. Incentives could also be provided to business owners and entrepreneurs in select, targeted, preferred industries and occupations;
3. Develop new business incubators and accelerators offering short-term rental program assistance to entrepreneurs entering the incubator/accelerator program. Upon graduation, entrepreneurs who successfully obtain venture capital funding and provide employment for three full-time new jobs at or above West Kendall's median income would be eligible for the long-term business and entrepreneur rental and homeownership programs detailed above.

Pairing housing support with new business formation can be especially important to new small ventures, as the founder typically must choose between reinvesting revenues from a new company instead of paying him/herself an income. Providing lower-cost housing alternatives would be an interesting way to launch a small entrepreneurial hub for a wide range of new ventures.

Profiles of the 7 Zip Codes in West Kendall

2017 DEMOGRAPHICS

Population **54,144**
 % Change 2012-2017 0.4%

Race & Ethnicity

White 95.8%
 Black 1.2%
 Other 3.0%
 Hispanic 92.7%

Total Households

15,300
 Family Households 80.4%
 Nonfamily Households 19.6%

EMPLOYMENT BASE

Labor Force Participation **59.7%**

Median Workforce Age **43.4**

% Working Family Households

2012 86.7%
 2017 87.3%

Leading Industries (# of Employees)

1. Educational services, health care, and social assistance (5,832)
2. Retail trade (3,723)
3. Professional, science, management, administrative and waste management (3,028)

Leading Occupations (# of Employees)

1. Sales and office (8,810)
2. Management, business, science and arts (7,654)
3. Service (4,928)

ECONOMIC VITALITY

Median Household Income **\$51,582**
 % Change 2012-2017 -1.4%

Real Per Capita Income **\$23,148**
 % Change 2012-2017 11.2%

Poverty Rate

2012 11.7%
 2017 15.9%

Food Assistance

% of Students Receiving Reduced-priced lunch 7.2%
 % of Households Receiving Food Stamps 22.3%

Median Housing Value **\$262,400**

Median Gross Rent **\$1,447**

Total Cost Burdened Households **7,284**

% of Owner-Occupied Units 30.4%

% of Renter-Occupied Units 70.8%

H+T Affordability Index **72%**

2017 DEMOGRAPHICS

Population **58,683**
% Change 2012-2017 7.1%

Race & Ethnicity

White 80.0%
Black 12.4%
Other 7.7%
Hispanic 74.5%

Total Households

14,394
Family Households 85.0%
Nonfamily Households 15.0%

EMPLOYMENT BASE

Labor Force Participation **62.0%**

Median Workforce Age **41.9**

% Working Family Households

2012 90.7%
2017 91.3%

Leading Industries (# of Employees)

1. Educational services, health care, and social assistance (6,344)
2. Retail trade (3,769)
3. Professional, science, management, administrative and waste management (3,536)

Leading Occupations (# of Employees)

1. Management, business, science and arts (7,941)
2. Sales (7,390)
3. Service (6,013)

ECONOMIC VITALITY

Median Household Income **\$55,444**
% Change 2012-2017 -2.3%

Real Per Capita Income **\$19,210**
% Change 2012-2017 4.2%

Poverty Rate

2012 11.2%
2017 13.3%

Food Assistance

% of Students Receiving Reduced-priced lunch 3.8%
% of Households Receiving Food Stamps 27.3%

Median Housing Value **\$210,100**

Median Gross Rent **\$1,371**

Total Cost Burdened Households

6,251
% of Owner-Occupied Units 37.2%
% of Renter-Occupied Units 61.5%

H+T Affordability Index **85%**

Data Sources: U.S. Census Bureau 2018-2012 and 2013-2017 American Community Survey 5-Year Estimates; Florida Department of Education 2017-2018 Lunch Status by LEA

West Kendall - 33177

2017 DEMOGRAPHICS

Population	39,100
% Change 2012-2017	9.5%
Race & Ethnicity	
White	93.4%
Black	1.8%
Other	4.7%
Hispanic	88.6%
Total Households	11,938
Family Households	78.8%
Nonfamily Households	21.2%

EMPLOYMENT BASE

Labor Force Participation	63.9%
Median Workforce Age	42.1
% Working Family Households	
2012	91.7%
2017	86.9%

Leading Industries (# of Employees)

1. Educational services, health care, and social assistance (4,830)
2. Retail trade (2,472)
3. Professional, science, management, administrative and waste management (2,049)

Leading Occupations (# of Employees)

1. Sales and office (6,524)
2. Management, business, science and arts (6,426)
3. Service (3,664)

ECONOMIC VITALITY

Median Household Income	\$53,546
% Change 2012-2017	1.2%
Real Per Capita Income	\$23,740
% Change 2012-2017	2.6%
Poverty Rate	
2012	13.5%
2017	13.6%
Food Assistance	
% of Students Receiving Reduced-priced lunch	8.0%
% of Households Receiving Food Stamps	22.3%
Median Housing Value	\$207,100
Median Gross Rent	\$1,413
Total Cost Burdened Households	5,142
% of Owner-Occupied Units	39.5%
% of Renter-Occupied Units	50.0%
H+T Affordability Index	76%

2017 DEMOGRAPHICS

Population
% Change 2012-2017 **31,647**
11.9%

Race & Ethnicity

White 90.3%
Black 1.7%
Other 8.0%
Hispanic 90.0%

Total Households

Family Households **8,052**
Nonfamily 87.1%
Households 12.9%

EMPLOYMENT BASE

Labor Force Participation 66.0%

Median Workforce Age 43.2

% Working Family Households

2012 95.4%
2017 94.5%

Leading Industries (# of Employees)

1. Educational services, health care, and social assistance (3,291)
2. Finance, insurance and real estate (1,970)
3. Retail (1,935)

Leading Occupations (# of Employees)

1. Management, business, science and arts (6,580)
2. Sales and office (5,209)
3. Service (2,392)

ECONOMIC VITALITY

Median Household Income \$80,429
% Change 2012-2017 7.3%

Real Per Capita Income \$27,562
% Change 2012-2017 7.5%

Poverty Rate
2012 7.4%
2017 8.2%

Food Assistance
% of Students Receiving Reduced-priced lunch 6.6%
% of Households Receiving Food Stamps 14.3%

Median Housing Value \$323,700

Median Gross Rent \$2,097

Total Cost Burdened Households 3,246
% of Owner-Occupied Units 36.8%
% of Renter-Occupied Units 61.5%

H+T Affordability Index 86%

2017 DEMOGRAPHICS

Population	71,260
% Change 2012-2017	0.4%

Race & Ethnicity

White	87.0%
Black	5.6%
Other	7.5%
Hispanic	68.1%

Total Households

Total Households	21,505
Family Households	76.6%
Nonfamily Households	23.4%

EMPLOYMENT BASE

Labor Force Participation	66.5%
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Median Workforce Age	42.5
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% Working Family Households

2012	92.6%
2017	93.0%

Leading Industries (# of Employees)

1. Educational services, health care, and social assistance (8,910)
2. Professional, science, management, administrative and waste management (5,164)
3. Retail (4,116)

Leading Occupations (# of Employees)

1. Management, business, science and arts (14,440)
2. Sales and office (11,626)
3. Service (6,190)

ECONOMIC VITALITY

Median Household Income	\$64,907
% Change 2012-2017	0.4%

Real Per Capita Income	\$26,632
% Change 2012-2017	-1.3%

Poverty Rate	
2012	10.0%
2017	10.3%

Food Assistance	
% of Students Receiving Reduced-priced lunch	5.4%
% of Households Receiving Food Stamps	10.2%

Median Housing Value	\$252,900
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Median Gross Rent	\$1,573
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Total Cost Burdened Households	8,502
% of Owner-Occupied Units	31.9%
% of Renter-Occupied Units	56.6%

H+T Affordability Index	60%
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2017 DEMOGRAPHICS

Population	51,417
% Change 2012-2017	16.4%
Race & Ethnicity	
White	91.2%
Black	1.8%
Other	7.0%
Hispanic	87.5%
Total Households	14,383
Family Households	86.3%
Nonfamily Households	13.7%

EMPLOYMENT BASE

Labor Force Participation	63.6%
Median Workforce Age	43

% Working Family Households	
2012	89.1%
2017	89.2%

Leading Industries (# of Employees)

1. Educational services, health care, and social assistance (5,422)
2. Retail trade (3,990)
3. Professional, science, management, administrative and waste management (2,960)

Leading Occupations (# of Employees)

1. Sales and office (8,189)
2. Management, business, science and arts (7,807)
3. Service (5,150)

ECONOMIC VITALITY

Median Household Income	\$54,132
% Change 2012-2017	12.7%
Real Per Capita Income	\$21,690
% Change 2012-2017	11.2%
Poverty Rate	
2012	13.8%
2017	13.6%
Food Assistance	
% of Students Receiving Reduced-priced lunch	6.7%
% of Households Receiving Food Stamps	25.6%
Median Housing Value	\$230,500
Median Gross Rent	\$1,371
Total Cost Burdened Households	7,185
% of Owner-Occupied Units	42.6%
% of Renter-Occupied Units	63.7%
H+T Affordability Index	94%

2017 DEMOGRAPHICS

Population **49,857**
% Change 2012-2017 11.5%

Race & Ethnicity

White 85.2%
Black 5.1%
Other 9.7%
Hispanic 77.3%

Total Households

Family Households **13,241**
Nonfamily 84.7%
Households 15.3%

EMPLOYMENT BASE

Labor Force Participation **66.4%**

Median Workforce Age **41.3**

% Working Family Households

2012 92.8%
2017 93.6%

Leading Industries (# of Employees)

1. Educational services, health care, and social assistance (5,423)
2. Retail trade (3,375)
3. Professional, science, management, administrative and waste management (3,123)

Leading Occupations (# of Employees)

4. Management, business, science and arts (9,637)
5. Sales and office (7,745)
6. Service (4,190)

ECONOMIC VITALITY

Median Household Income \$73,382
% Change 2012-2017 13.7%

Real Per Capita Income \$25,631
% Change 2012-2017 7.9%

Poverty Rate
2012 11.7%
2017 9.1%

Food Assistance
% of Students Receiving Reduced-priced lunch 6.2%
% of Households Receiving Food Stamps 14.6%

Median Housing Value \$275,700

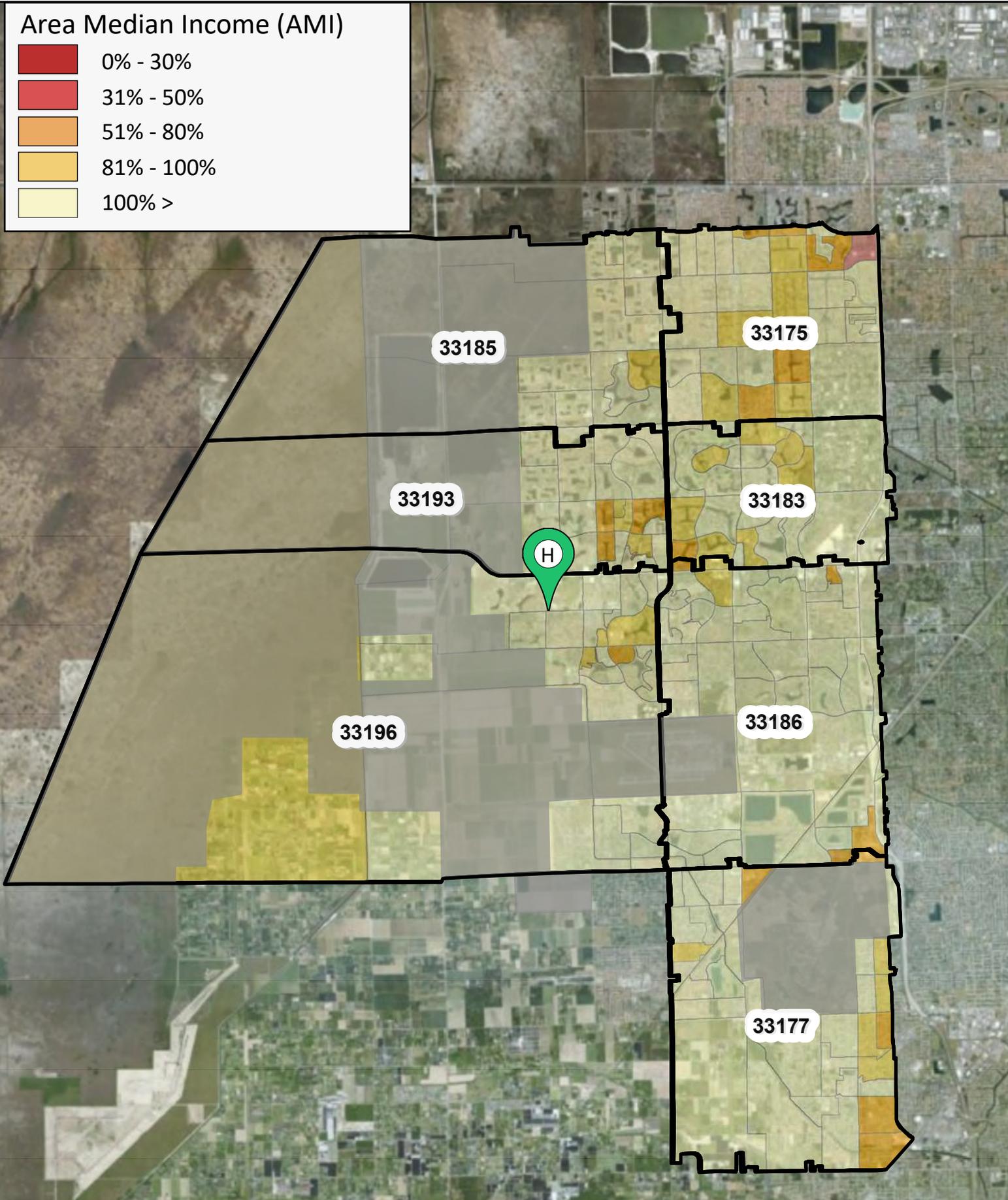
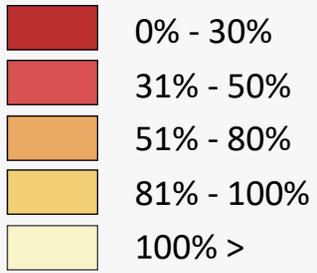
Median Gross Rent \$1,737

Total Cost Burdened Households 5,757
% of Owner-Occupied Units 34.6%
% of Renter-Occupied Units 60.8%

H+T Affordability Index 76%

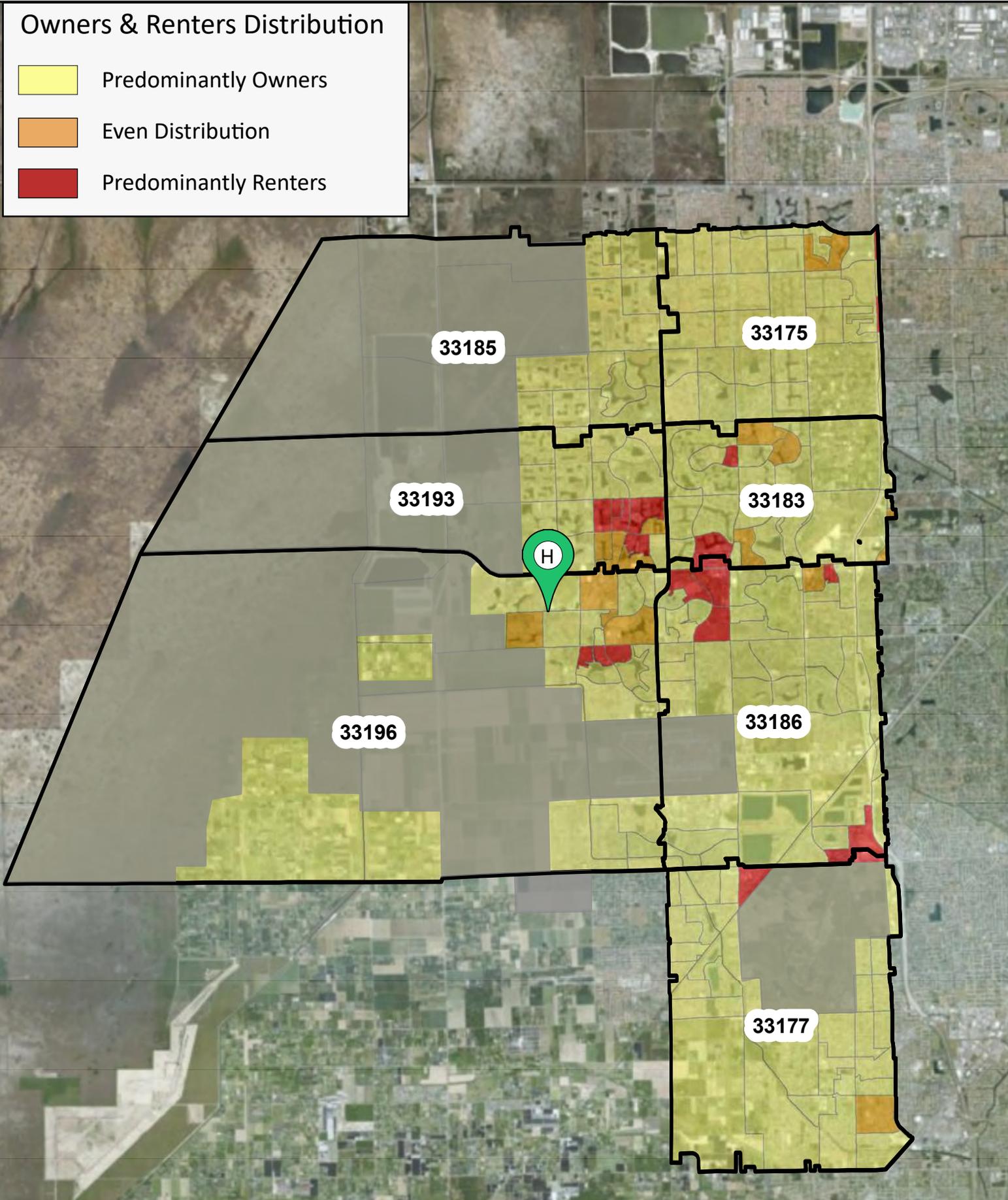
West Kendall Area Mapping

Area Median Income (AMI)

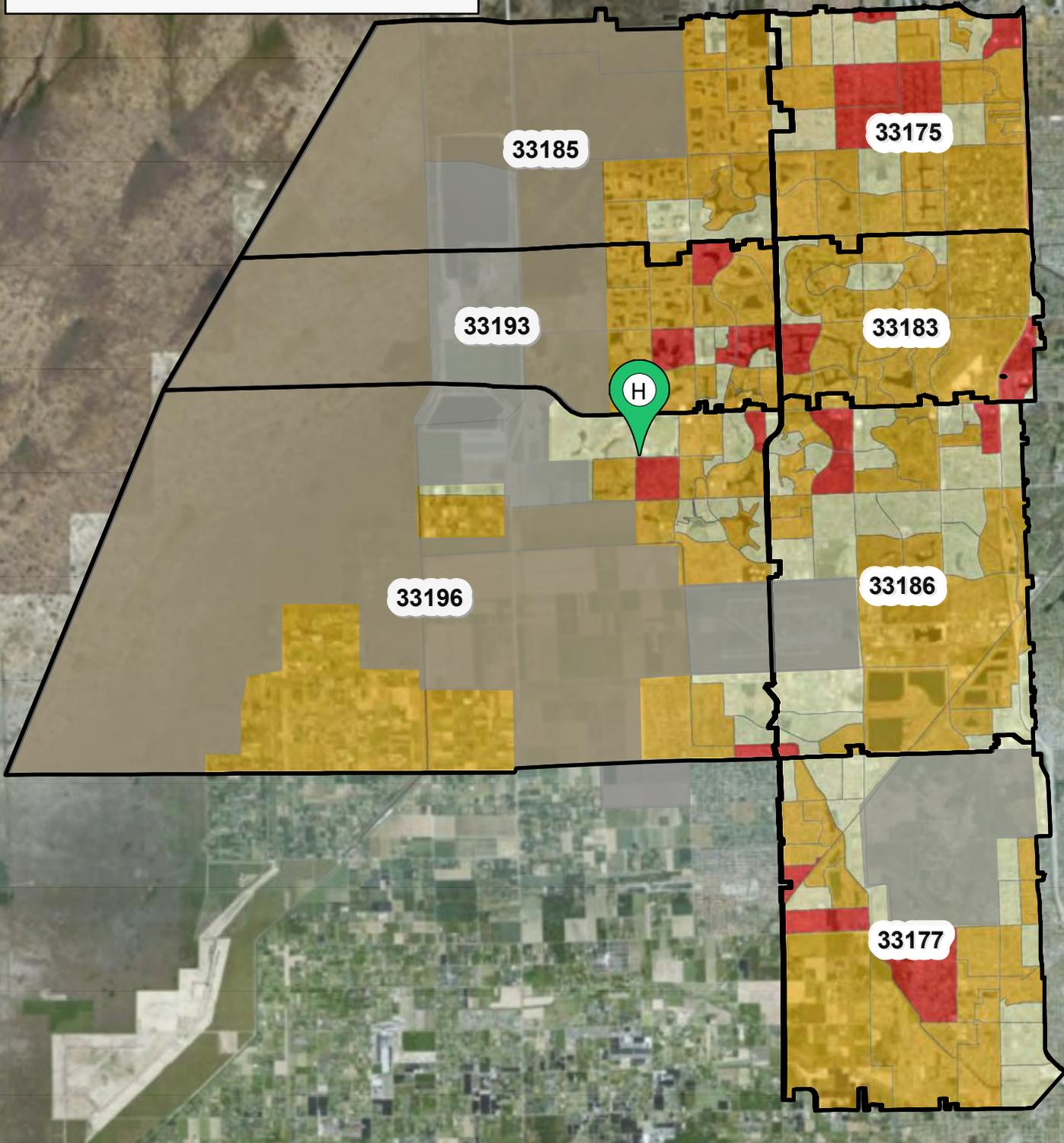
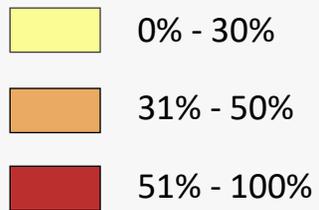


Owners & Renters Distribution

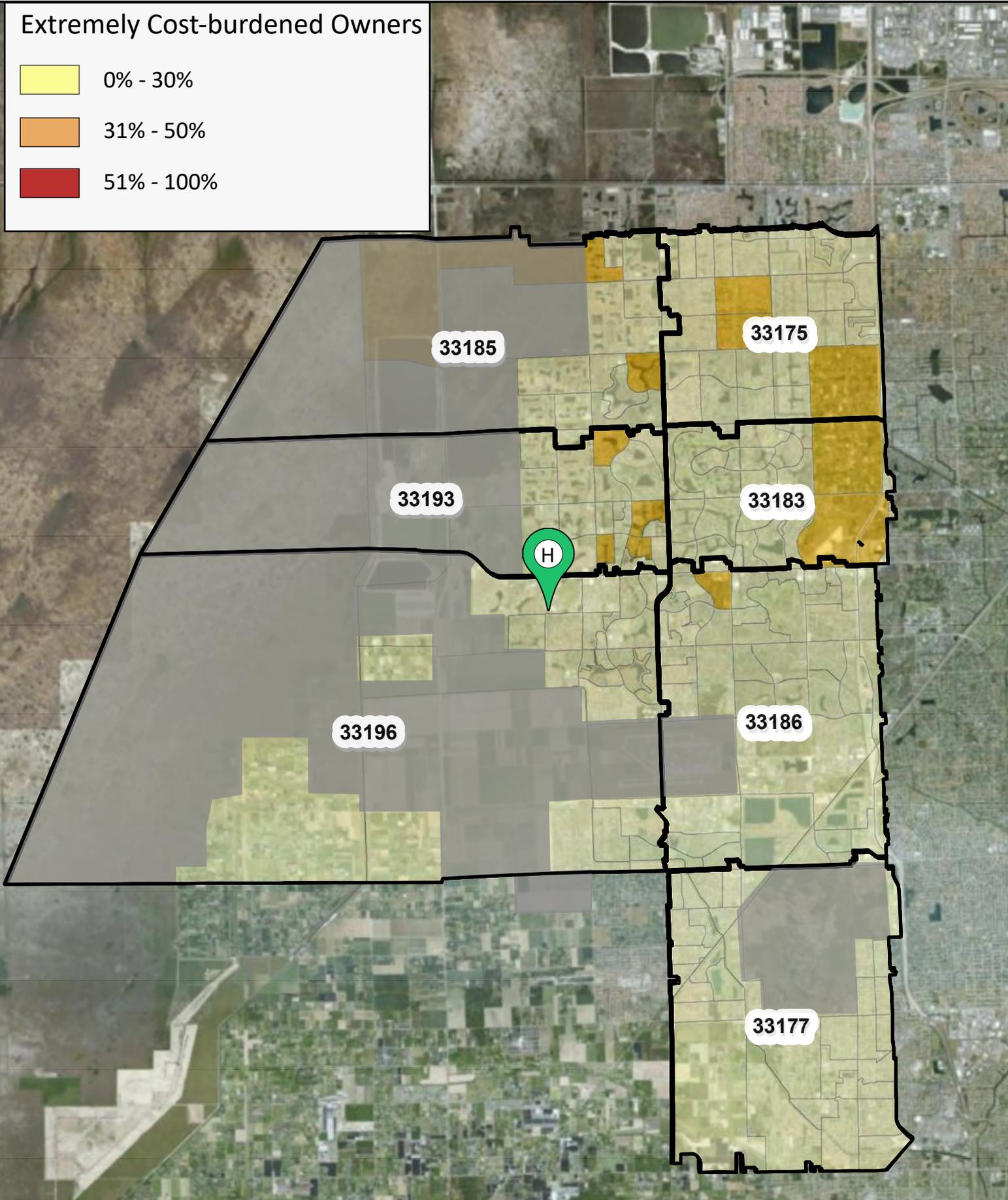
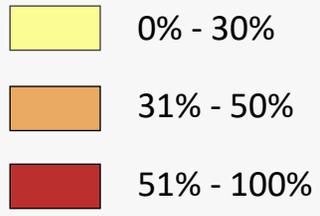
- Predominantly Owners
- Even Distribution
- Predominantly Renters



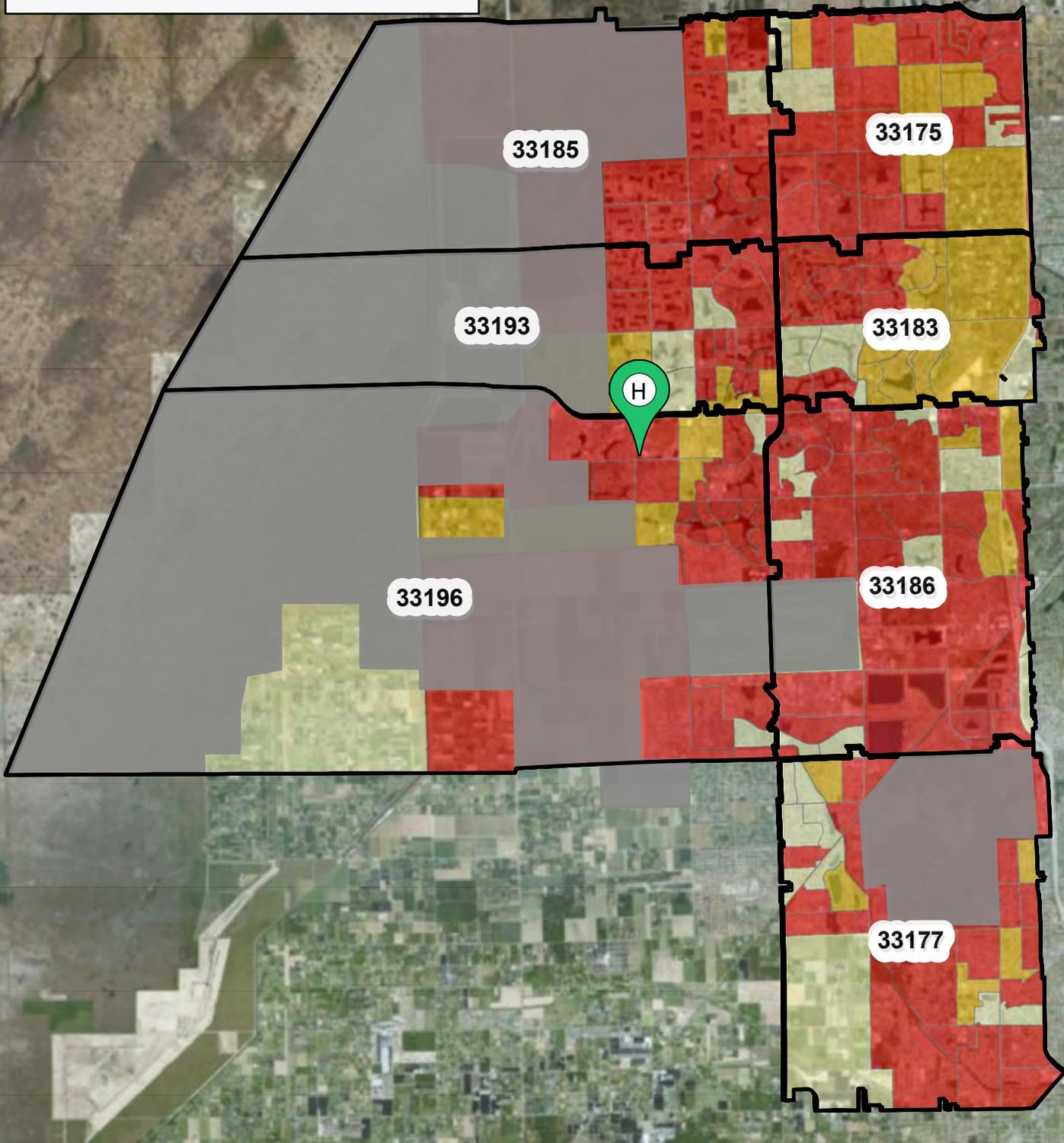
Cost-burdened Owners



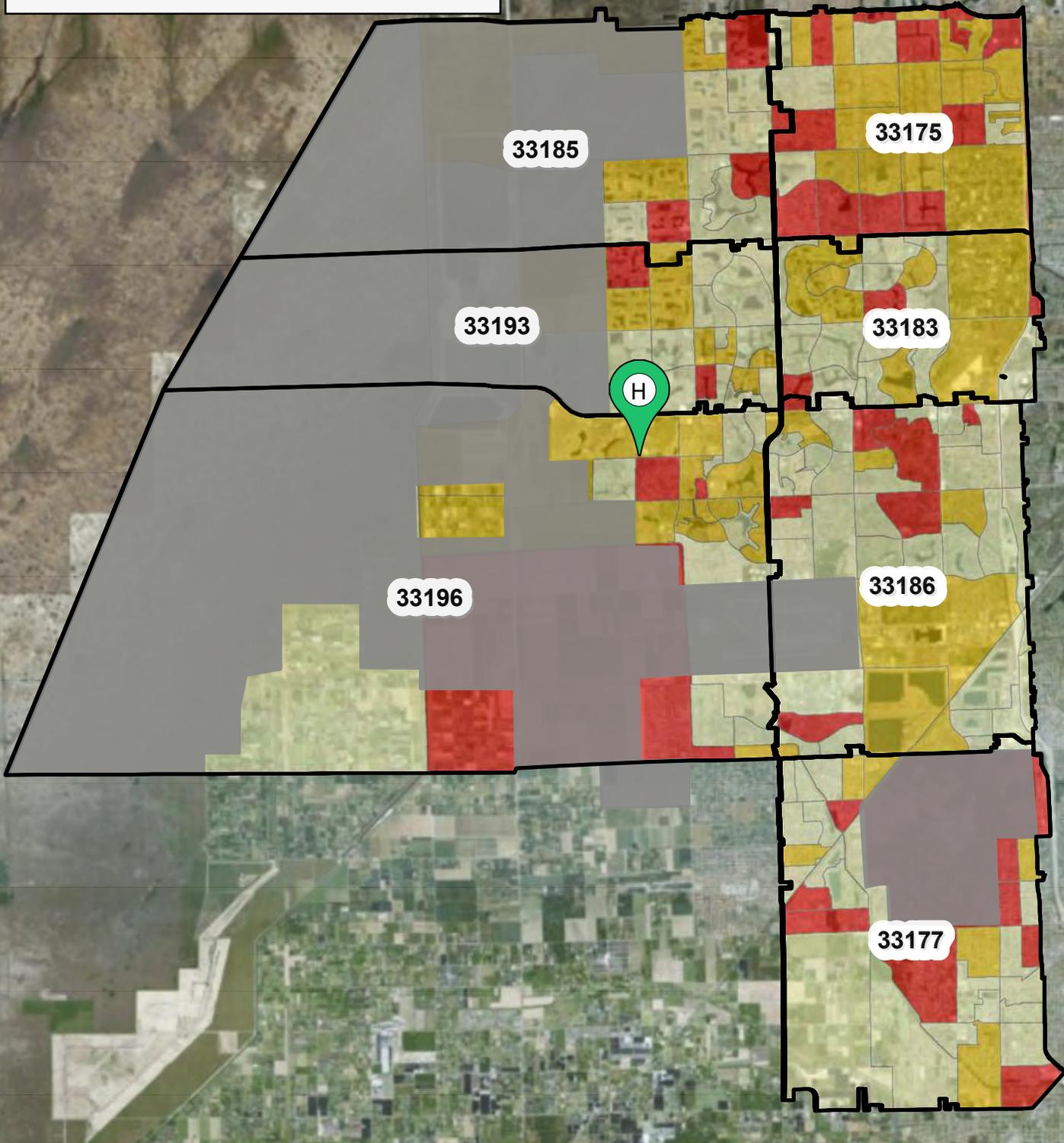
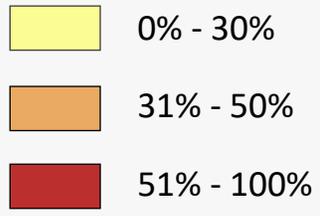
Extremely Cost-burdened Owners



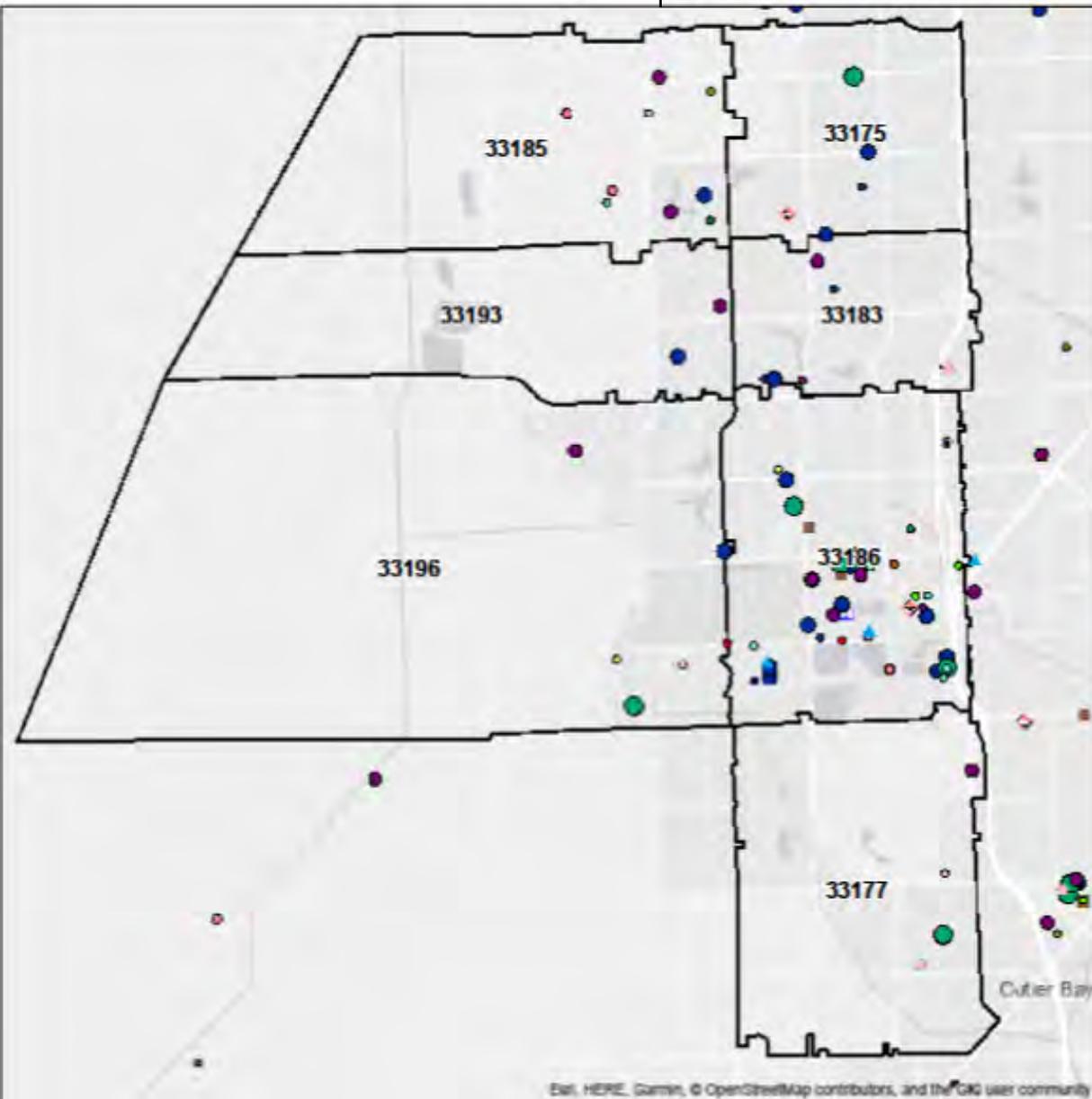
Cost-burdened Renters



Extremely Cost-burdened Renters



Manufacturing Industries



Legend

- ◆ Ship and Boat Building 3369
- Railroad Rolling Stock Manufacturing 3366
- Pharmaceutical and Medicine Manufacturing 3254.csv
- Petroleum and Coal Products Manufacturing 3241
- Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing 3253
- Other Nonmetallic Mineral Product Manufacturing 3279
- Other Miscellaneous Manufacturing 3399
- Other General Purpose Machinery Manufacturing 3339
- Other Electrical Equipment and Component Manufacturing 3359
- ▲ Other Chemical Product and Preparation Manufacturing 3259
- Navigational, Measuring, Electromedical, and Control Instruments 3345
- Motor Vehicle Parts Manufacturing 3363
- Motor Vehicle Manufacturing 3361
- Motor Vehicle Body and Trailer Manufacturing 3362
- Medical Equipment and Supplies Manufacturing 3391
- Iron and Steel Mills and Ferroalloy Manufacturing 3311
- Industrial Machinery Manufacturing 3332
- Foundries 3315
- Computer and Peripheral Equipment Manufacturing 3341
- Communications Equipment Manufacturing 3342
- Commercial and Service Industry Machinery Manufacturing 3333
- Clay Product and Refractory Manufacturing 3271
- Audio and Video Equipment Manufacturing 3343
- Agriculture, Construction, and Mining 3331
- Aerospace Product and Parts Manufacturing 3364