

NW 18TH AVENUE CORRIDOR

MARKET AREA STUDY

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CONTENTS

INTRODUCTION	2
AREA CHARACTERISTICS.....	3
LOCATION.....	3
LAND USE ANALYSIS.....	4
PROPERTY OWNERSHIP PATTERNS.....	5
ESTABLISHMENTS.....	6
MARKET AREA ANALYSIS.....	7
POPULATION.....	7
AGE AND GENDER.....	8
EDUCATIONAL ATTAINMENT.....	10
LABOR FORCE.....	11
INCOME AND POVERTY.....	12
HOUSING.....	15
HOUSEHOLD TYPE.....	16
MARKET SIZE.....	18
SUMMARY.....	18
OPPORTUNITIES.....	19

INTRODUCTION

This report presents an analysis of the NW 18th Avenue Business Corridor from NW 62nd Street to NW 71st Street. The purpose is to present an overall view of the Corridor and surrounding area, as well as to provide relevant data and analysis for the subsequent formulation of recommendations to enhance the business and economic health of the Corridor. The report contains three sections, namely an analysis of area characteristics, a market study, and an analysis of opportunities. The first section includes an examination of existing land use, businesses, and ownership patterns. This is followed by a market area analysis that examines relevant demographic, economic, and housing characteristics. The analysis examines the socioeconomic characteristics of the area within one-half and one mile of the corridor.

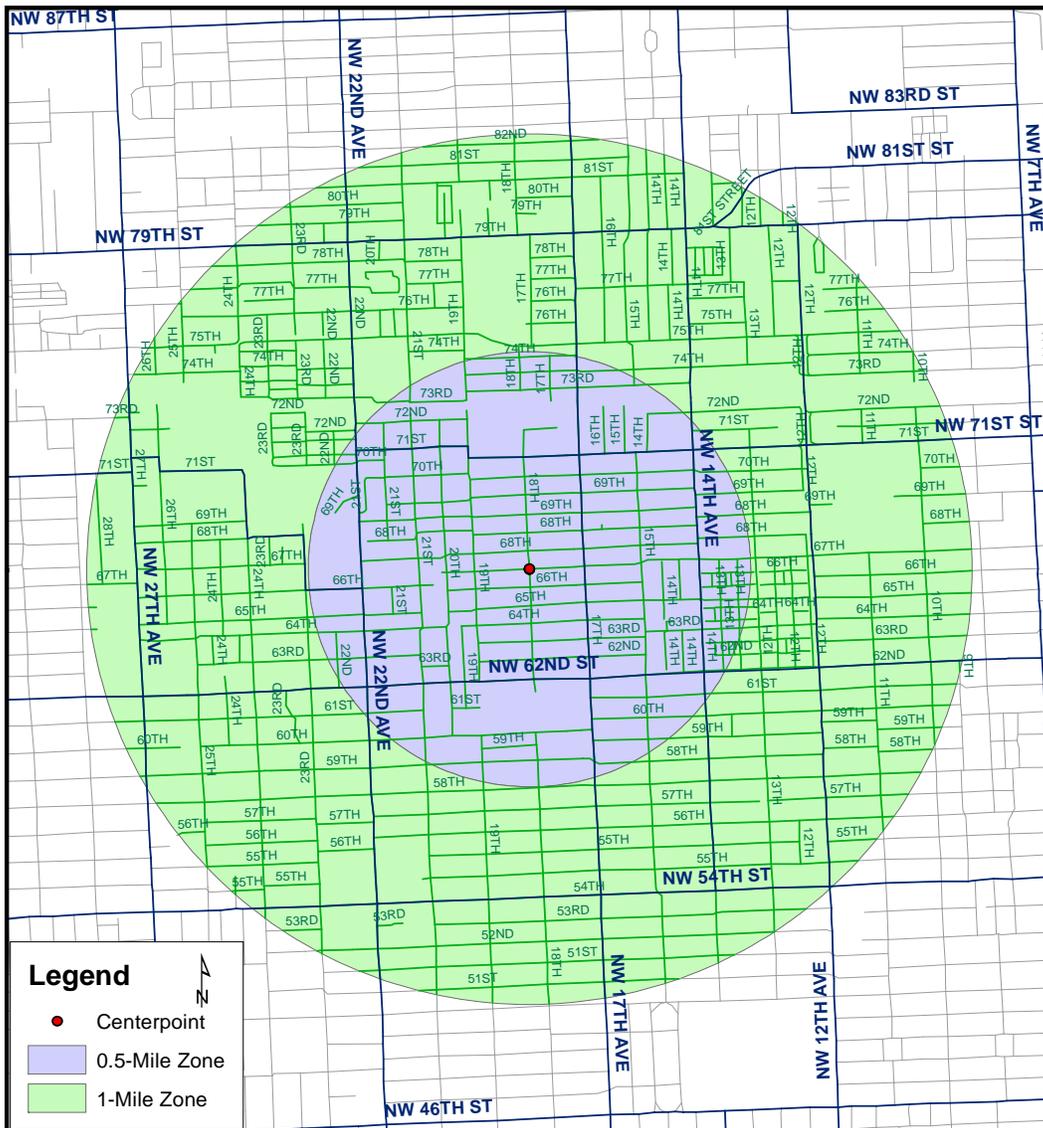
Finally, an analysis of opportunities based on the previous components of the report is developed. This analysis focuses on determining the potential for future development and for business expansion.

AREA CHARACTERISTICS

LOCATION

The NW 18th Avenue Business Corridor is situated in the North Central part of Miami-Dade County. The business corridor is nine blocks long and is primarily surrounded by residential areas, as well as several more primary roadways that have some commercial use.

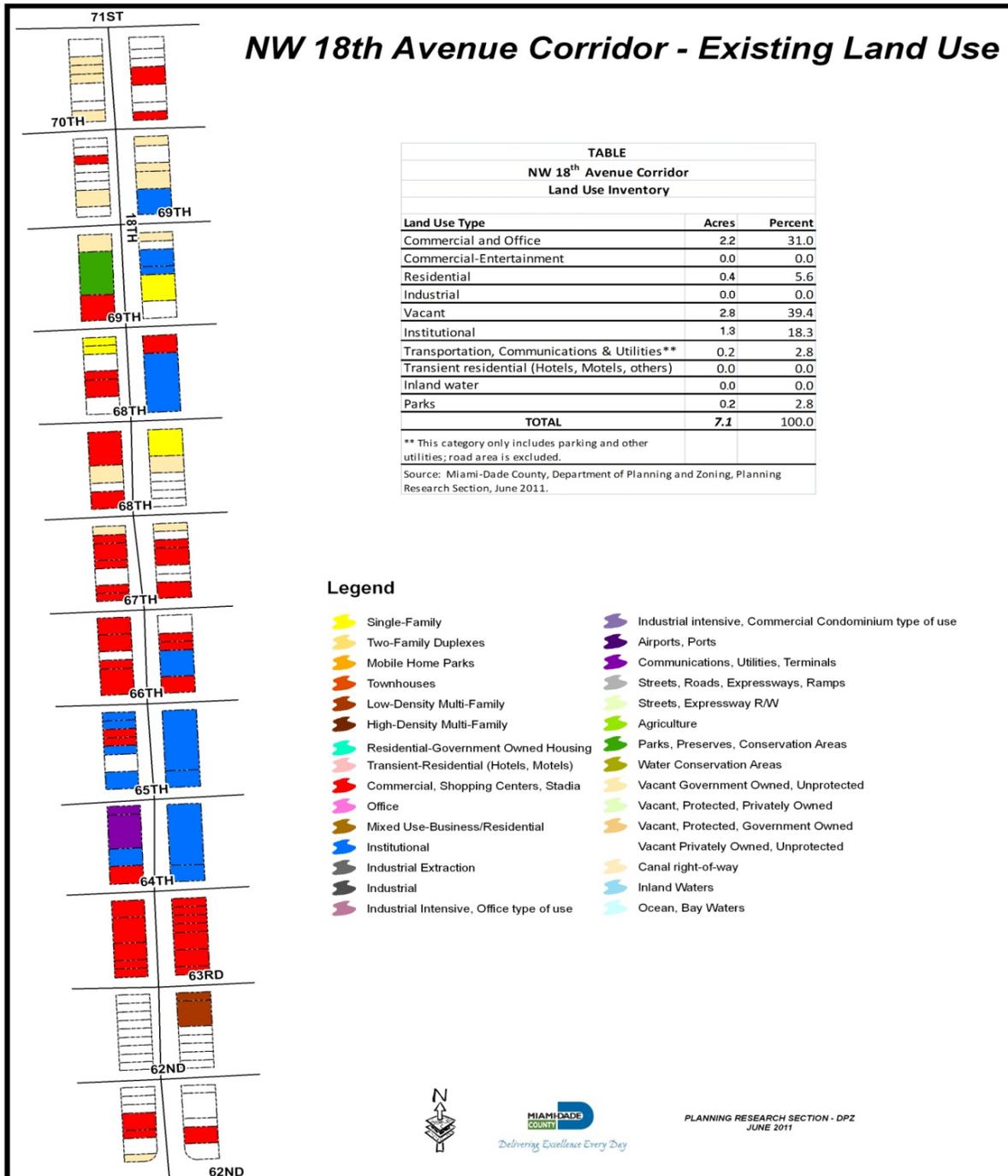
MAP 1. NW 18th Avenue Corridor



LAND USE ANALYSIS

The NW 18th Avenue Business Corridor extends from NW 62nd Street to NW 71st Street. It has a total area of 7.1 acres (see Map 2). The largest existing land use is vacant land that amounts to 2.8 acres or 39.4 percent of the total. This is followed by commercial and office use at 2.2 acres or 31 percent of the total. The other major land use is institutional that amounts to 1.3 acres or 18.3 percent of the total of the 2.8 acres of vacant land, xx percent is privately owned, the remainder in government ownership.

Map 2.



PROPERTY OWNERSHIP PATTERNS

There are 132 lots in the Corridor with a total area of 6.97 acres. 16 parcels are owned by various departments of Miami-Dade County, for a total of 0.82 acres. Members of the Harewood family own 17 parcels, or 0.74 acres in total. Next in order of lot size, various religious institutions own 10 parcels with a size one-fifth of an acre or more.

As for building owners, first in the list are the members of the Harewood family who own the most parcels in the Corridor. Together, the Harewood family members hold the ownership to over 7 structures with total of 8,351 sq.ft. Five of these seven structures exceed 1,220 in square footage. Religious institutions own nearly 30 percent (17,681 sq.ft.) of the existing building square footage in the Corridor. This includes the first two and the fourth largest buildings summing up to 12,523 sq.ft. The largest privately owned building was built in 1939 and has a square footage of 3,924. It belongs to Everette Slocum Sr., the third most important private owner of building square footage in the Corridor.

TABLE 1. MOST IMPORTANT OWNERS OF BUILDING SQUARE FOOTAGE (1,000 OR HIGHER)

OWNER	TOTAL BLDG_SQFT
CUTHBERT HAREWOOD JR & W MYRLIE COLEMAN	8,351
THE ST JAMES AFRICAN METHODIST EPISCOPAL CHURCH OF MIAMI INC	5,897
EVERETTE SLOCUM SR	5,249
TR OF METROPOLITAN AME CHURCH	4,932
THE HOUSE OF GOD CHURCH WHICH IS THE CHURCH OF THE LIVING GOD	3,716
MARY WILSON	3,711
ELKS LODGE #1052	3,136
ROSEBUD LIGHTBOURN FOSTER & B H HARTFIELD	2,437
GLADYS BROWN	2,348
SUMMA PROPERTIES INC	2,267
THOMAS J FINNIE & W JUANITA	1,773
REGIONS BANK	1,520
BROADWAY PLACE INC	1,467
DAVID EDWARD RAMSEY (JR) &	1,456
AMMIE BAKER	1,306
PHILLIP THOMPSON	1,163

Source: Miami-Dade County, Property Appraiser, 2011.

ESTABLISHMENTS

There are 42 buildings in the Corridor, with a total square footage of 59,484 sq. ft. Commercial buildings account for 44,939 square feet or about 75 percent of the total square footage. Most of the buildings are older, with over 88 percent built over 50 years ago and one-third over 70 years ago. Many of these buildings appear to have no active business. Field observation indicated that 13 businesses were active.¹ Of these seven were groceries; other included dry cleaners on each of the following: restaurant, a hair salon, laundry, shoe shop and a social club. These thirteen businesses were in building that had approximately 15,300 sq. ft. Therefore there was about 29,600 sq. ft. unoccupied and available for additional businesses.

TABLE 2.
Structure Year Built

DECADE BUILT	Number of Structures	Percent
1920-1930	1	2.4%
1931-1940	13	31.0%
1941-1950	10	23.8%
1951-1960	13	31.0%
1961-1970	4	9.5%
1971-1980	0	0.0%
1981-1990	1	2.4%
Total Structures	42	100.0%

Source: Miami-Dade County, Property Appraiser. 2011.

¹ The field observation took place on June 15th, 2011 in the afternoon. As there was only an observation there may, in fact, be more active businesses.

MARKET AREA ANALYSIS

The purpose of this analysis is to explore the market demand conditions pertinent to the NW 18th Avenue Business Corridor. As the corridor is composed of neighborhood type business establishments market areas of one-half and one mile was chosen for the analysis. This analysis focuses on the different components that effect demand of the population in the area surrounding the corridor. Data for the demand analysis is from the 2000 and 2010 Decennial Census as well as the American Community Survey 2005-2009.

POPULATION

During the period from 2000 to 2010 the population within the larger one mile market area went from 26,434 to 24,295 or a decrease of 8.1 percent (see Table 3). The decline in the one half mile market area was even greater as it amounted to a loss of 17.4 percent. This is in contrast to the County, where population increased by 10.8 percent from 2000 to 2010.

TABLE 3.
Race and Ethnicity, 2000 and 2010

Dataset	Total Population	Hispanic	White Not Hispanic	Black Not Hispanic	Other Not Hispanic
Miami-Dade County					
Census 2000	2,253,362	1,291,737	465,772	427,140	68,713
Percent of the Total	100.0%	57.3%	20.7%	19.0%	3.0%
Census 2010	2,496,435	1,623,859	383,551	425,650	63,375
Percent of the Total	100.0%	65.0%	15.4%	17.1%	2.5%
Change 2000 - 2010 (Percent)	10.8%	25.7%	-17.7%	-0.3%	-7.8%
NW 18th Avenue Corridor, 0.5 Mile Zone					
Census 2000	8,646	212	47	8,300	87
Percent of the Total	100.0%	2.5%	0.5%	96.0%	1.0%
Census 2010	7143	736	51	6275	81
Percent of the Total	100.0%	10.3%	0.7%	87.8%	1.1%
Change 2000 - 2010 (Percent)	-17.4%	247.2%	8.5%	-24.4%	-6.9%
NW 18th Avenue Corridor, 1-Mile Zone					
Census 2000	26,434	1,517	161	24,466	290
Percent of the Total	100.0%	5.7%	0.6%	92.6%	1.1%
Census 2010	24,295	3,695	239	20,083	278
Percent of the Total	100.0%	15.2%	1.0%	82.7%	1.1%
Change 2000 - 2010 (Percent)	-8.1%	143.6%	48.4%	-17.9%	-4.1%

Source: U.S. Census Bureau. Decennial Census 2000, Summary File 1 and Census 2010. Miami-Dade County Department of Planning and Zoning, Research Section, 2011.

Over this same period, the Not Hispanic Black population decreased by 4,383 persons or 17.9 percent, while the share of Not Hispanic Black persons to the total population declined from 92.6 percent in 2000 to 82.7 percent in 2010. There was a rapid increase in Hispanic population rising from 1,517 in 2000 to 3,695 in 2010. This resulted in the percentage of Hispanic persons growing to 15.2 percent of the total population in 2010 in the one mile market area.

The increase in Hispanic persons somewhat offset the decline in Not Hispanic Blacks, so that total population declined less than it otherwise would have. Not Hispanic White persons represented less than one percent of the population. These trends were also the case in the one half mile market area. The decline in the Black population, for this area, over the same period was even larger in percentage terms. In 2000, 96 percent of the population was Not Hispanic Black, while this figure declined to 87.8 percent in 2010.

At the County level, in contrast to these trends, Hispanics increased by 25.7 percent over this period, while Not Hispanic Black persons decreased by 0.3 percent. These changes as well as the large drop in Not Hispanic White persons resulted in marked changes to the composition of the County in 2010. The share of Hispanic persons rose to 65 percent of the population, while there were decreases in percentage terms for the Not Hispanic Black and Not Hispanic Whites to 17.1 percent and 15.4 percent respectively. Clearly, the overall population dynamics in the market areas and the County are quite dissimilar.

AGE AND GENDER

Table 4 shows age by gender for the market area. In the market areas, as well as in the County as a whole, there are more women than men. However, in the 2005-2009 period both the one half and mile market area had a substantially higher number at 59.0 and 57.9 percent respectively compared to 51.3 percent for the County.

TABLE 4.
Gender, Percent of Total Population

Area		2000	2005-2009
Miami-Dade County	Females	51.8%	51.3%
	Males	48.2%	48.7%
NW 18th Avenue Corridor 0.5-mile Zone	Females	57.3%	59.0%
	Males	42.7%	41.0%
NW 18th Avenue Corridor 1-mile Zone	Females	55.1%	57.9%
	Males	44.9%	42.1%

Source: U.S. Census Bureau 2000, SF3 and American Community Survey 2005-2009 5-Year Estimates. Miami-Dade Planning and Zoning, Research Section, 2011.

There are major differences in the age structure when the market areas are compared to the County. The under 18 years of age category in 2010 represented 23.5 percent of the population for the County, in contrast to the market areas. In the one half mile and one mile market area the corresponding percentages were 47.8 and 37.2 percent respectively.

Moreover, in the one half mile market area children less than five years were 17.0 percent of the total population in contrast to the 6.9 percent figure for the County. The reverse relationship is seen in the 18 to 64 year working age population as 62.4 percent of persons in the County fell in this category compared to the much lower percentages of 52.1 and 46.7 percent in the one half and one mile market areas respectively. While the senior population, 65 years and above, was 14.1 percent of the total in the County, the corresponding figures were markedly lower in the market areas at 5.5 and 10.7 percent in the one half and one mile market areas respectively.

TABLE 5
Age by Area

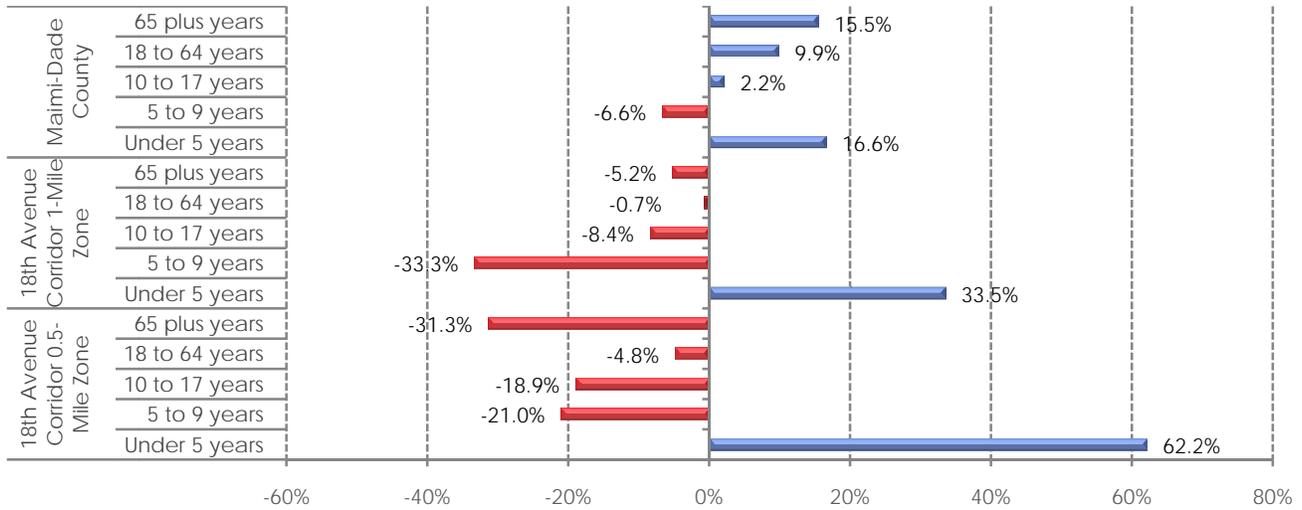
		<u>2000</u>		<u>2005-2009</u>	
		<i>Number</i>	<i>% of Total Population</i>	<i>Number</i>	<i>% of Total Population</i>
18th Avenue Corridor 0.5-Mile Zone	<i>Under 5 years</i>	1,012	9.9%	1,641	17.0%
	<i>5 to 9 years</i>	1,581	15.5%	1,249	13.0%
	<i>10 to 17 years</i>	2,115	20.7%	1,715	17.8%
	<i>18 to 64 years</i>	4,724	46.3%	4,497	46.7%
	<i>65 plus years</i>	773	7.6%	531	5.5%
18th Avenue Corridor 1-Mile Zone	<i>Under 5 years</i>	2,453	9%	3,275	12.5%
	<i>5 to 9 years</i>	3,183	12%	2,123	8.1%
	<i>10 to 17 years</i>	4,757	18%	4,359	16.6%
	<i>18 to 64 years</i>	13,773	51%	13,681	52.1%
	<i>65 plus years</i>	2,973	11%	2,819	10.7%
Miami-Dade County	<i>Under 5 years</i>	144,850	6%	168,911	6.9%
	<i>5 to 9 years</i>	159,353	7%	148,782	6.1%
	<i>10 to 17 years</i>	253,219	11%	258,703	10.5%
	<i>18 to 64 years</i>	1,395,623	62%	1,533,700	62.4%
	<i>65 plus years</i>	300,317	13%	346,948	14.1%

Source: U.S. Census Bureau 2000, SF3 and American Community Survey 2005-2009 5-Year Estimates. Miami-Dade Planning and Zoning, Research Section, 2011.

Examining the changes in age cohorts over the 2000 to 2005-2009 period, it is important to note that in the one half mile market area children under five years increased by 62.2 percent, while persons 65 and above decreased by 31.3 percent. This compares to increases of 16.6 percent in the former group and 15.5 percent in the latter for the County.

Overall, the differences in the age and gender characteristics of the market areas and the County have significant implications regarding market demand. This follows as the higher percentage of children and more female headed households with children found in the market areas compared to the County translate into fewer wage earners and, consequently, lower household incomes.

Figure 1. Age Cohorts, Percent Change 2000 to 2005-2009



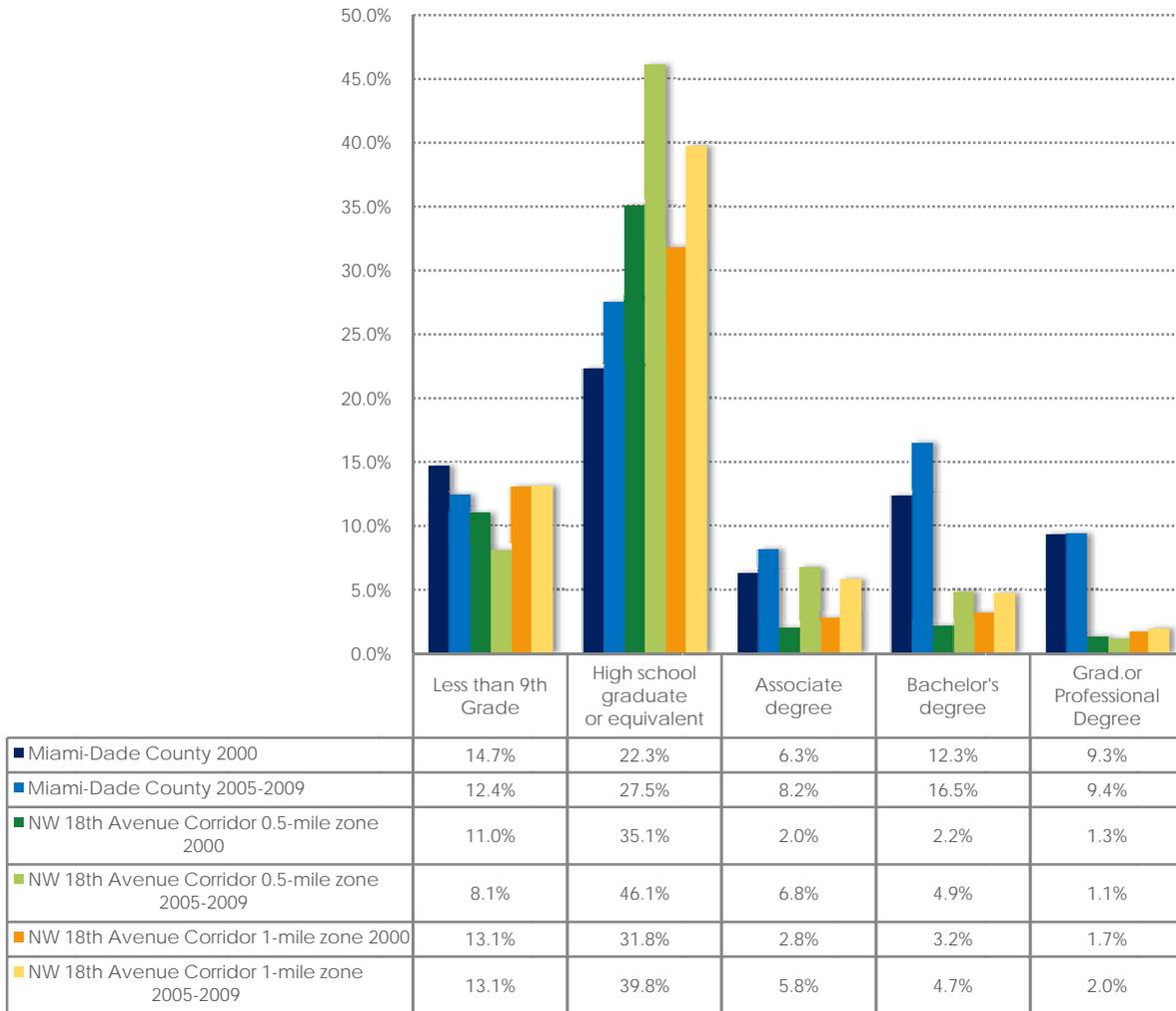
Source: U.S. Census Bureau 2000, SF3 and American Community Survey 2005-2009 5-Year Estimates. Miami-Dade Planning and Zoning, Research Section, 2011.

EDUCATIONAL ATTAINMENT

For the 2000 to 2005-2009 period, it is important to note that in almost all categories of educational attainment there was improvement for both market areas and the County. Although the percentage of persons that do not have a high school diploma are similar in the one half mile market area and the County, 26.3 percent versus 23.5 percent, their composition is noticeably different. In the one-half mile market area in the 2005-2009 period only 3.3 percent of the population had less than a 9th grade education compared to 12.4 percent in the County. This difference is most likely a result of the much greater percentage of immigrants in the County than in the market areas. On the other hand, in the County 11.1 percent of the population attained an education of at least the ninth grade level but were less than a high school graduates. In contrast, for the market area this figure increases to between 18.2 and 19.2 percent. This appears to be an indicator of high school dropouts.

A key difference in the 2000 to 2005-2009 period between both the one half and one mile market areas and the County is a significantly lower percentage of persons with at least a Bachelor's degree. In the County 25.9 percent of the population have achieved this level of educational attainment, while in the one half and one mile market areas the figures are much lower at 6.0 and 6.4 percent, respectively. Given the much higher earning potential of those persons with at least a Bachelor's degree and the lower level of unemployment generally found for those with this level of educational attainment, this is a limiting factor on the economic well being of current residents in the market areas as well as for potential demand.

Figure 2. Educational Attainment for the Population 25 Years and Over, by Area



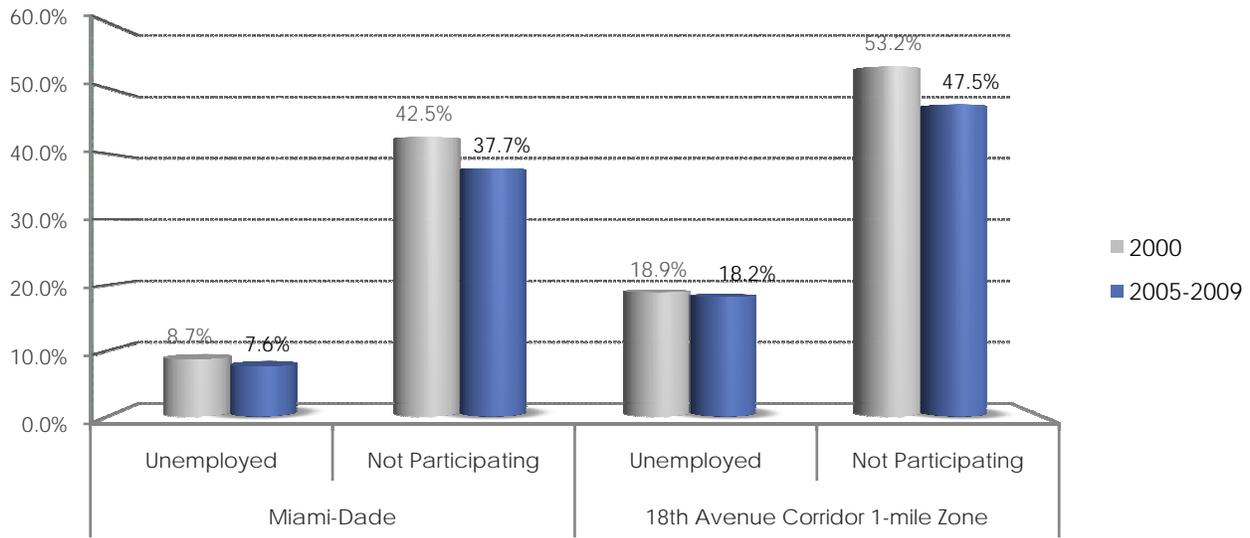
Source: US Census Bureau 2000, SF3 and American Community Survey 2005-2009 5-Year Estimates. Miami-Dade Planning and Zoning, Research Section, 2011.

LABOR FORCE

Although there was a slight decrease, over the 2000 to 2005-2009 period, unemployment remained high at 18.2 percent in the one mile market area.² This compares to a significantly lower figure in the County at 7.6 percent. Although persons not participating in the labor force declined by a similar degree in both the market area and the County. The rate for those not participating in the labor force was noticeable higher in the market area at 47.5 percent than in the County at 37.7 percent. This results in fewer potential wage earners and hence lower overall household income.

² Figures for the one half mile market area are unavailable.

Figure 3. Labor Force Participation for Population 16 Years and Above



Source: U.S. Census Bureau 2000, SF3 and American Community Survey 2005-2009 5-Year Estimates, Census Tracts. Miami-Dade Planning and Zoning, Research Section, 2011.

INCOME AND POVERTY

Both in 1999 and the 2005-2009 period, median household income in both market areas was considerably below that for the County. In the 2005-2009 period, median household income in the one-half mile market area was \$18,912, expressed in 2009 dollars, or 44.0 percent of the figure for the County. In the one mile market area the corresponding percentage rises is to 48.7 percent. While the County experienced a 7.2 percent decrease in median household income since 1999, both of the market areas displayed a sizeable increase. For the one-half mile market area this increase was quite large, 22.3 percent, while the corresponding change in the one mile market area was 8.0 percent. In the one-half mile market area median household income expressed in 2009 dollars increased from \$15,469 in 2000 to \$18,912 for the 2005-2009 period. (See Figure 4.)

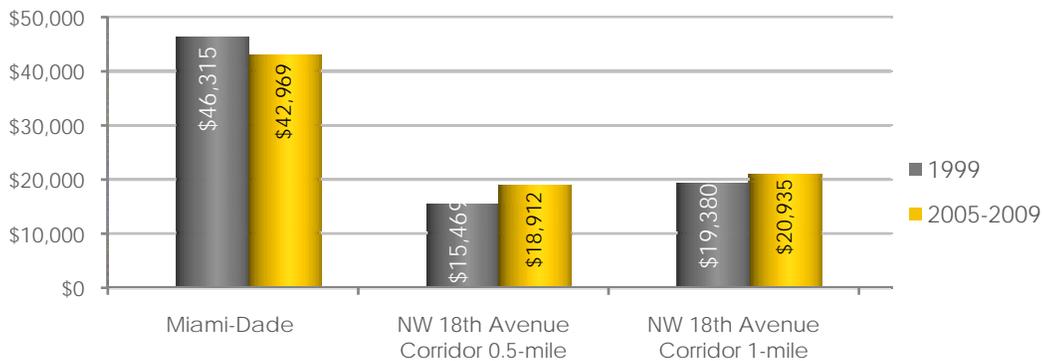
The distribution of income in the two market areas is similar, with approximately 50 percent of households with income below \$20,000 compared to 23 percent in the County. This has a sizeable impact on the both the supportable level of demand, as well as the types of goods and services that residents would demand.

TABLE 6.
Median Household Income (expressed in 2009-dollars)

	1999	2005-2009	% Change
Miami-Dade County	\$46,315	\$42,969	-7.2%
NW 18th Avenue Corridor 0.5-mile	\$15,469	\$18,912	22.3%
% of the County Median	33.4%	44.0%	
NW 18th Avenue Corridor 1-mile	\$19,380	\$20,935	8.0%
% of the County Median	41.8%	48.7%	

Source: US Census Bureau 2000, SF3 and American Community Survey 2005-2009 5-Year Estimates. Miami-Dade Planning and Zoning, Research Section, 2011.

Figure 4. Median Household Income



Source: US Census Bureau 2000, SF3 and American Community Survey 2005-2009 5-Year Estimates. Miami-Dade Planning and Zoning, Research Section, 2011.

Countywide from 1999 to 2005-2009 persons with income below the poverty level fell from 18.0 percent to 16.9 percent. Although the poverty rates were a great deal higher in the market areas than in the County, there was a much more significant decline in the latter. For the one-half mile market area the figures for persons in poverty declined from 62.2 percent in 1999 to 55.2 percent in the latter period. In the one mile market the corresponding percentages are 51.3 and 43.4 percent. This is likely due, in part, to the demolition of residential structures at Scott Carver Homes and the consequential loss of very low income persons.

In terms of households with income below the poverty level, the results were similar. All three areas showed declines over the 2000 to 2005-2009 period, with the market areas experiencing decreases of 21.2 and 29.6 percent for the one mile and one-half mile areas respectively. Again, there were notable differences between the market areas and the County, in terms of poverty by household type. In both market areas in the 2005-2009 period over 50 percent of households below the poverty level were female householders with no husband present. (See Table 7-2.) In the one-half mile market area this figure is 72.1 percent, while in the one mile market area it is lower at 51.8 percent. On the other hand, in the County this figure was considerably lower at 25.5 percent.

TABLE 7-1.
Poverty Rates (Persons)

	1999	2005-2009	Percent Chg
<i>Miami-Dade</i>			
Total Persons for whom poverty status is determined:	2,209,089	2,397,862	8.5%
With income below poverty level	396,995	404,051	1.8%
Percent of Individuals	18.0%	16.9%	
<i>NW 18th Avenue Corridor 0.5-mile Zone</i>			
Total Persons for whom poverty status is determined:	10,158	9,610	
With income below poverty level	6,321	5,309	-16.0%
Percent of Individuals	62.2%	55.2%	
<i>NW 18th Avenue Corridor 1-mile zone</i>			
Total Persons for whom poverty status is determined:	26,956	26,080	-3.2%
With income below poverty level	13,833	11,320	-18.2%
Percent of Individuals	51.3%	43.4%	

Source: US Census Bureau 2000, SF3 and American Community Survey 2005-2009 5-Year Estimates. Miami-Dade Planning and Zoning, Research Section, 2011.

TABLE 7-2.
Poverty Rates (Households)

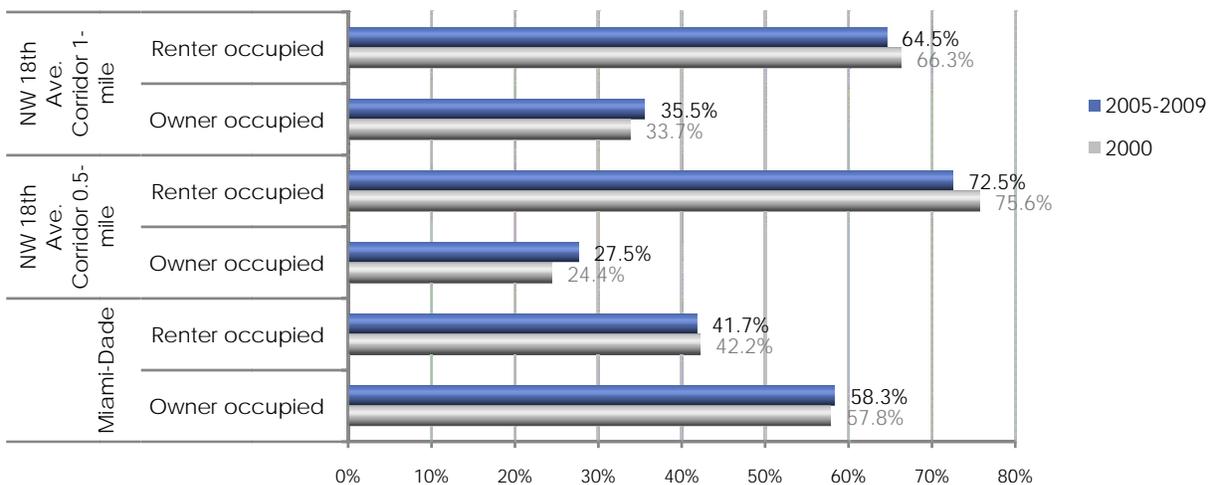
	1999		2005-2009		Percent Chg
<i>Miami-Dade County</i>					
Total Households:	777,378	-	827,931	-	6.5%
With Income below poverty level	140,569	100.0%	147,372	100.0%	4.8%
Percent of Total Households	18.1%		17.8%		-1.6%
Married-couple family	35,040	24.9%	31,965	21.7%	-8.8%
Male householder; no wife present	7,449	5.3%	6,985	4.7%	-6.2%
Female householder; no husband present	37,619	26.8%	37,554	25.5%	-0.2%
Nonfamily households	60,461	43.0%	70,348	47.7%	16.4%
<i>NW 18th Avenue Corridor 0.5-mile zone</i>					
Total Households:	3,036		2,570		-15.3%
With Income below poverty level	1,746	100.0%	1,229	100.0%	-29.6%
Percent of Total Households	57.5%		47.8%		-16.8%
Married-couple family	87	5.0%	91	7.4%	4.6%
Male householder; no wife present	96	5.5%	26	2.1%	-72.9%
Female householder; no husband present	1,220	69.9%	886	72.1%	-27.4%
Nonfamily households	343	19.6%	226	18.4%	-34.1%
<i>NW 18th Avenue Corridor 1-mile zone</i>					
Total Households:	8,964		8,225		-8.2%
With Income below poverty level	4,253	100.0%	3,353	100.0%	-21.2%
Percent of Total Households	47.4%		40.8%		-14.1%
Married-couple family	331	7.8%	262	7.8%	-20.8%
Male householder; no wife present	350	8.2%	120	3.6%	-65.7%
Female householder; no husband present	2,246	52.8%	1,737	51.8%	-22.7%
Nonfamily households	1,326	31.2%	1,234	36.8%	-6.9%

Source: US Census Bureau 2000, SF3 and American Community Survey 2005-2009 5-Year Estimates. Miami-Dade Planning and Zoning, Research Section, 2011.

HOUSING

There are significant differences between the market areas and the County in terms of tenure or type of housing unit ownership. For the 2005-2009 period the majority of housing units in Miami-Dade County, at 58.3 percent, were owner occupied. This is in sharp contrast to the two market areas where over two-thirds of the housing units were renter occupied. In fact, in the one half mile market area this figure was even higher at 72.5 percent. Over the 2000 to 2005-2009 period, there were only small differences in tenure for all three two market areas.

Figure 5. Tenure (Percent of Occupied Housing Units), by Area



Source: US Census Bureau 2000, SF3 and American Community Survey 2005-2009 5-Year Estimates. Miami-Dade Planning and Zoning, Research Section, 2011.

In the 2005-2009 period, median gross rent was considerably lower in the market areas than in the County. This figure was \$965 in the County, while it was less than half this figure at \$454 in the one half mile market area and \$613 in the one mile area. In this latter area median gross rent grew considerably faster at 37.1 percent, than in the one half mile market area and the County. In the 2005-2009 period, the percent of that households spent on rent was 34.7 percent in the one half mile and 39.1 percent in the one mile market area. This was in line with the corresponding County figure of 37.5 percent.

Median monthly owner costs in the 2005 to 2009 period were significantly lower than in market areas than in the County where the figure was \$1,826. In the one half mile market area the corresponding figure was \$1,245 and in the one mile area it was somewhat higher at \$1,338. In this same period, 32.6 percent of household income went for the housing costs in the one half mile market area, while it was higher in the one mile area at 42.8 percent. In the County, the corresponding figure was 34.5 percent. Monthly owner costs rose by approximately the same percent in the one mile market area, while The change was much larger in one half mile market area where it increased by a higher rate of 43.6 percent.

TABLE 8.
Housing Affordability (all dollars in adjusted to 2009)

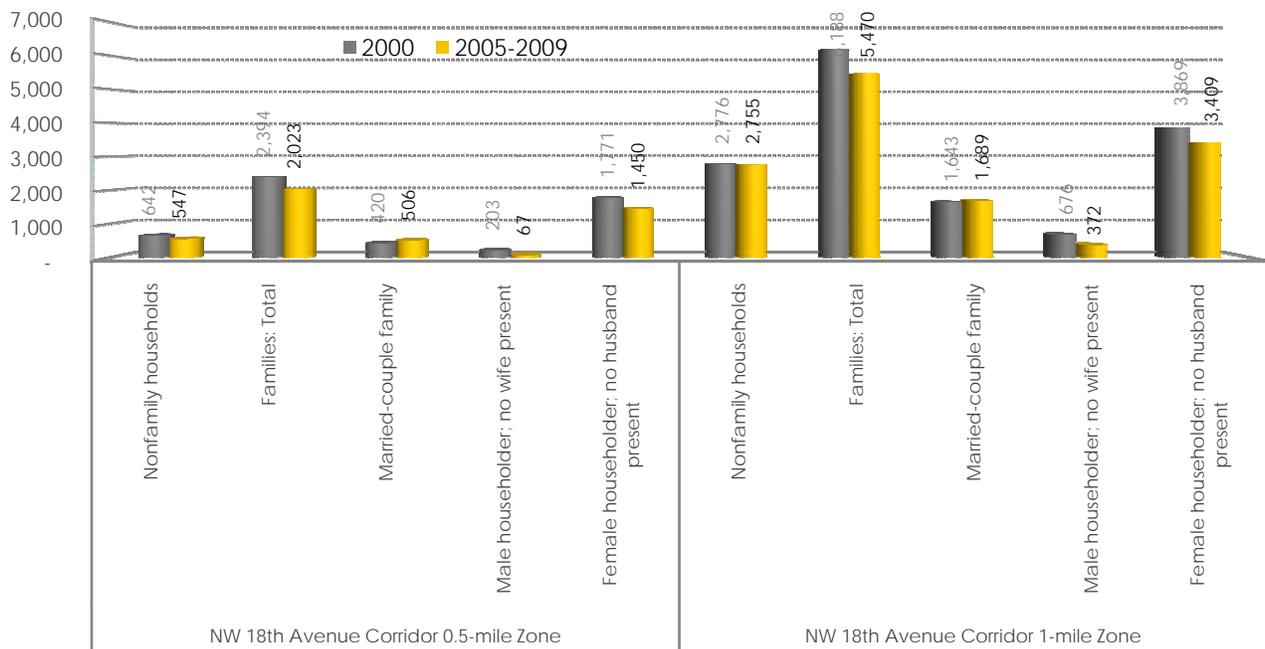
	NW 18 th Ave 0.5-Mile Zone			NW 18 th Ave 1-Mile Zone			Miami-Dade County		
	1999	2005-09	Change	1999	2005-09	Change	1999	2005-09	Change
Median gross rent	\$382	\$454	18.9%	\$447	\$613	37.1%	\$833	\$965	15.8%
- As a percentage of household income	35.90%	34.7%	-3.3%	32.9%	39.1%	18.8%	30.5%	37.5%	23.0%
Median selected monthly owner costs for housing units with a mortgage	\$1,108	\$1,245	12.4%	\$1,112	\$1,338	20.4%	\$1,553	\$1,826	17.6%
- As a percentage of household income	22.7%	32.6%	43.6%	32.8%	42.8%	30.7%	26.6%	34.5%	29.7%

Source: US Census Bureau 2000, SF3 and American Community Survey 2005-2009 5-Year Estimates. Miami-Dade Planning and Zoning, Research Section, 2011.

HOUSEHOLD TYPE

One very important non-economic characteristic that helps define a neighborhood is the composition of households. The first consideration is whether the households are made up of families. In the county during the 2005-2009 period 68.5 percent of all households were family households, while this figure increases to 78.7 percent in the one half mile market area and 66.5 percent in the one mile area. The remainder is simply nonfamily households.

Figure 6. Households by Type



Source: US Census Bureau 2000, SF3 and American Community Survey 2005-2009 5-Year Estimates. Miami-Dade Planning and Zoning, Research Section, 2011.

However, it is the makeup of family households that is markedly different between the two areas. Of the family households in the county 66.4 percent were married couple families, this percentage drops markedly to 26.6 and 30.9 percent in the one half and one mile market areas, respectively. At the same time, female headed households with no husband present rises to approximately 62 percent of the family households in the both market areas; the corresponding figure in the County is much lower at 24.8 percent. Further, approximately 60 percent of all female headed households, in both market areas, have children under 18 years of age. This has clear ramifications in terms of household income earning potential.

TABLE 9.
Household Type

		2000		2005-2009	
NW 18th Avenue Corridor 0.5-mile Zone	Households: Total	3,036	100.0%	2,570	100.0%
	Nonfamily households	642	21.1%	547	21.3%
	Families: Total	2,394	78.9%	2,023	78.7%
	Married-couple family	420	13.8%	506	19.7%
	Married-couple family; With own children under 18 years	183	6.0%	245	9.5%
	Male householder; no wife present	203	6.7%	67	2.6%
	Male householder; no wife present; With own children under 18 years	101	3.3%	24	0.9%
	Female householder; no husband present	1,771	58.3%	1,450	56.4%
	Female householder; no husband present; With own children under 18 years	1,279	42.1%	1,032	40.2%
		2000		2005-2009	
NW 18th Avenue Corridor 1-mile Zone	Households: Total	8,964	100.0%	8,225	100.0%
	Nonfamily households	2,776	31.0%	2,755	33.5%
	Families: Total	6,188	69.0%	5,470	66.5%
	Married-couple family	1,643	18.3%	1,689	20.5%
	Married-couple family; With own children under 18 years	664	7.4%	538	6.5%
	Male householder; no wife present	676	7.5%	372	4.5%
	Male householder; no wife present; With own children under 18 years	334	3.7%	92	1.1%
	Female householder; no husband present	3,869	43.2%	3,409	41.4%
	Female householder; no husband present; With own children under 18 years	2,445	27.3%	1,995	24.3%

Source: US Census Bureau 2000, SF3 and American Community Survey 2005-2009 5-Year Estimates. Miami-Dade Planning and Zoning, Research Section, 2011.

MARKET SIZE

Aggregate household income is a gross measure of market demand and it provides an indicator of the demand for goods and services. As a result of decreases in population for the two market areas over the 2000 to 2005-2009 period, aggregate household income also declined. In the 2005 to 2009 period, aggregate household incomes was \$72,241,500 in the one half mile market area, while the corresponding figure for the one mile market area, was \$244,086,700. Over the 2000 to 2005-2009 period there was a decrease of between 10.8 and 17.8 percent in aggregate household income for the one half and one mile market areas, respectively.

SUMMARY

Socioeconomic trends from 2000 to the 2000-2009 period demonstrate a continuation of the decline experienced in these market areas previously. Key indicators accurately portray the current situation. The population in both market areas declined by over 17 percent in the smaller market area and over 8.0 percent in the larger one. Persons in the under 18 years of age category in 2010, varied between 37 and 47 percent of the population in the market areas. This was over 50 percent higher than the percent found in the County. In terms of educational attainment, approximately 6 percent of persons had at least a Bachelor's degree in the market areas, while the figure for the County was over four times higher. In terms of household structure, again the market areas fare poorly relative to the County. Households headed by females with children represent between 24 and 40 percent in the market areas, whereas the comparable figure in the County is just under 9 percent. This and the low percentage of persons with at least a Bachelor's degree have clear ramifications in terms of household income earning potential and consequently poverty. Median household income in the markets areas is less than half of the figure for the County. As a result the percent of persons in poverty in the market areas is over two and one half times that for the County. The effect of population loss and low incomes level results in aggregate household income that is quite low in the market areas. In turn, the household income needed to support new business development is lacking.

Given the downward trend in aggregate household income that resulted from loss of population over the past ten years, and given the available commercial building space, no additional commercial square footage along the NW 18th Avenue Business Corridor is warranted. There appears to be over 29,000 square feet of commercial with no active businesses. However, many of the businesses are in older structures that are outdated and may be in need of building upgrades. In fact, 55 percent are at least 60 years old. Although there is an excess of commercial space along the Corridor, a new commercial building that could house several existing or possibly new businesses in a more modern setting may be justified.

Much of the loss of population in the one half mile market area was due to the loss of residential buildings and population at the Scott Carver Homes site. Due to this and other vacant parcels in this area, there is residential capacity for 935 new homes in the area that translates into about 2,600 persons. If this capacity was utilized there would be a 37 percent increase in population, and a proportionate increase in aggregate household income and thus demand for goods and services. In addition, many of the vacant parcels and buildings that appeared not to have active businesses could be utilized for non-commercial purposes, such as residential units, if a mixed use zoning were put in place. Again, this would augment aggregate demand and provide a more desirable use for some of the vacant properties and unused buildings.

In addition to County support for infill housing in the area and implementation of a mixed used zoning classification along the Corridor, the County should fully develop its park property along the Corridor and ensure that necessary infrastructure is in place for future development. Further, it is essential to that the Corridor is a safe environment for the businesses and their customers, if the Corridor is to regain its historical more active use.

MIAMI-DADE COUNTY DEPARTMENT OF PLANNING AND ZONING
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