

# **MIAMI-DADE COUNTY**

## **2045 SE DATA FORECAST**

### **LRTP Steering Committee Update**

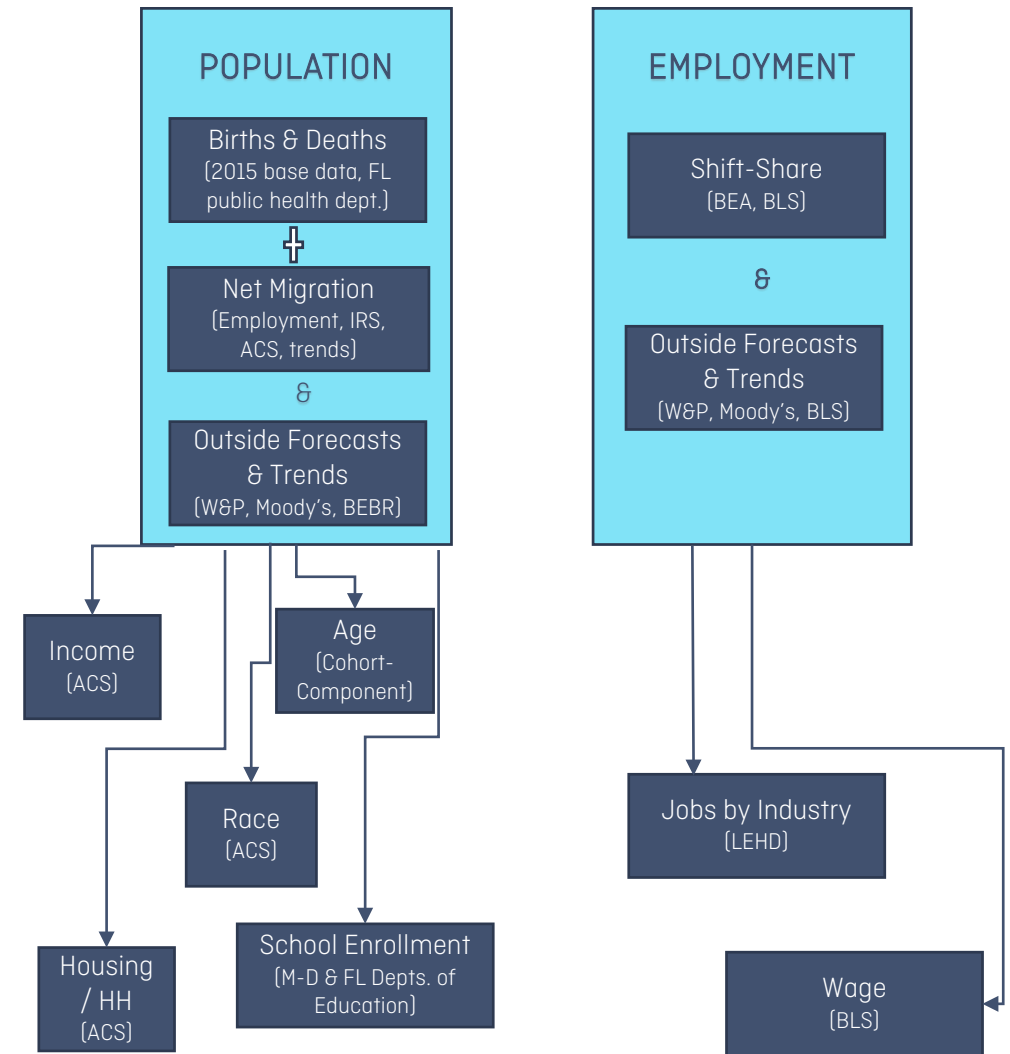
---

SE Data Development Team (Renaissance Planning, Atkins, Caltrans)

June 8, 2018

# FORECAST METHODOLOGY

- Project began with a national best practice review
- SE Team settled on a “top-down, bottom-up” approach, first creating countywide totals then allocating total to MAZs
- Cohort-component method was used for population control total and modified shift-share for employment control total, supplemented by review of relevant regional and national trends



# FORECAST METHODOLOGY

- Allocation to MAZs done through development of an in-house model that balanced:
  - A) demand for growth by development type
    - population, employment types
  - B) capacity for growth
    - supply of undeveloped land, likelihood for redevelopment/infill
- Model used concept of “profiles” for matching spatial characteristics to development demand
- More than two dozen variables used to characterize MAZs and determine demand by profiles, but local knowledge and insight was used as both key input and evaluator of data outputs
- Methodology documentation is available

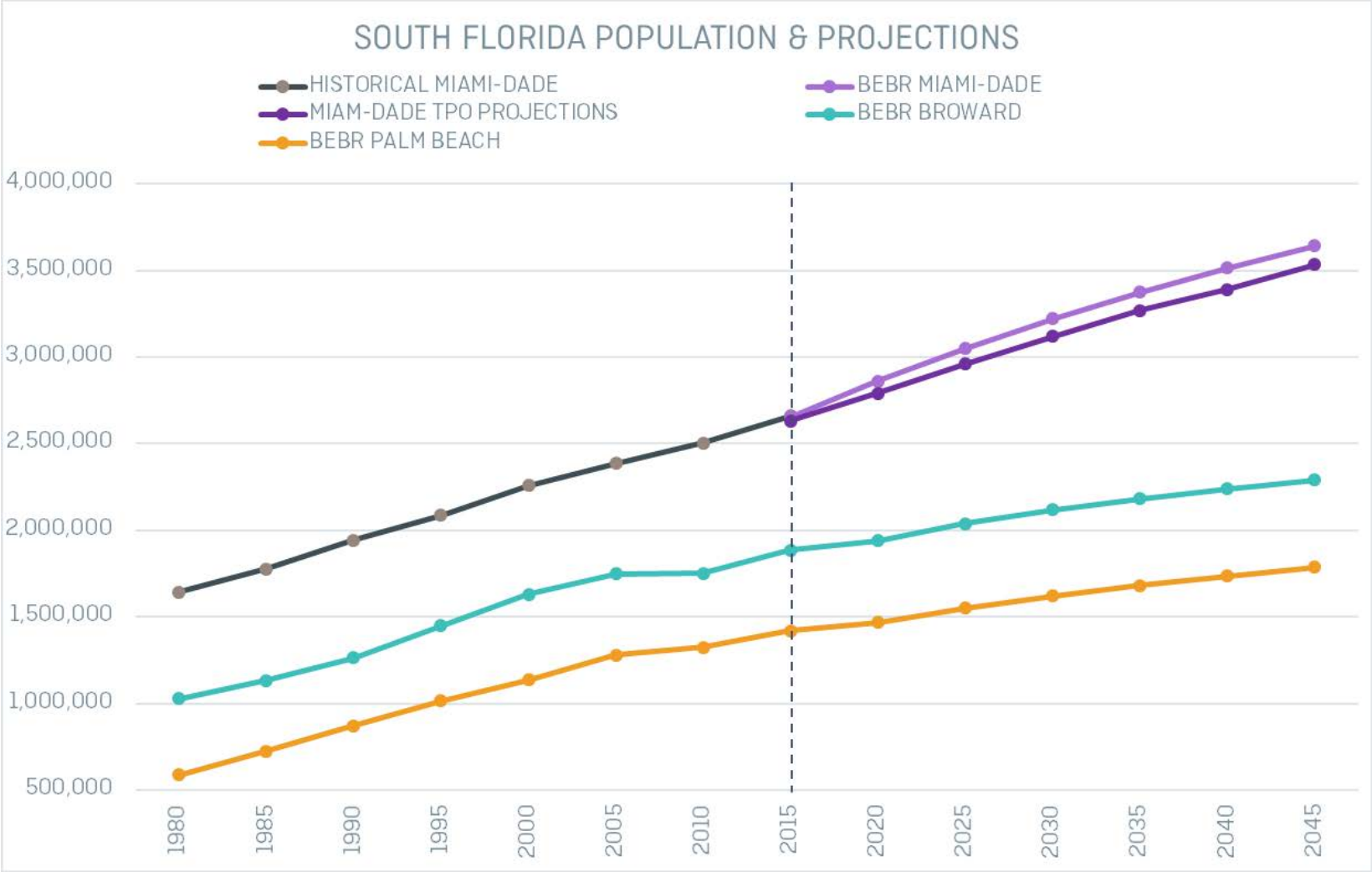
-5	4	0	20	25	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
----	---	---	----	----	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---

# POPULATION AND EMPLOYMENT SUMMARIES

	2015	2045	Change	Pct Ch.
Population	2,648,000	3,533,000	885,000	33%
Employment	1,351,000	1,814,000	463,000	34%

- Population growth of 885k is very similar to growth over last 30 year period
- Employment growth is harder to compare with historical trends given recent change in definition, but is in line with post-2000 growth trends

# BEBR AND TPO PROJECTIONS



- TPO forecasts for Miami-Dade are lower than BEBR, though BEBR forecast has declined between 2017 and 2018 versions

# 2045 POPULATION FORECAST SUMMARY

- Total Population & Households  
3,460,000 HH Population, 1,256,000 Households
- Gender:  
52.5% Female, 47.5% Male
- Housing Type:  
55% Single Family, 44% Multi Family, 1% Mobile Home
- Age:  
19% under 18, 39% 18-49, 43% 50+
- Ethnic Composition:  
69% Hispanic, 13% Non-Hispanic White, 18% Non-Hispanic Other
- Household composition:  
70% of Households have no children
- HH Income Proportions:  
Class 1-5 (lowest to highest): 29%, 24%, 18%, 10%, 18%

# 2045 EMPLOYMENT FORECAST SUMMARY

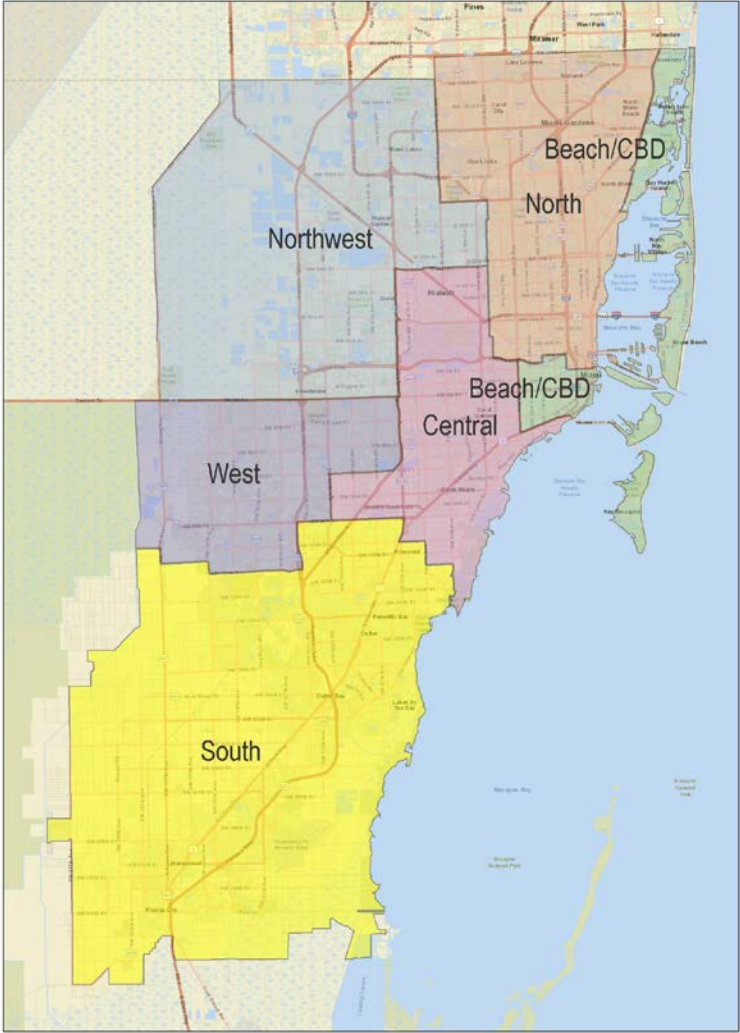
Employment Type	Total Employment
Agriculture	2,300
Construction	77,000
Utilities	5,600
Manufacturing	69,100
Wholesale & Warehouse	102,60
Transportation	59,000
Retail	253,900
Prof. Business Svcs	406,100

Employment Type	Total Employment
Private Education	20,000
Health	274,500
Personal Services	162,000
Amusement	43,200
Hotel	46,200
Restaurant & Bar	125,300
State & Local Govt	81,200
Public Education	99,300

- Employment driven by consumption / tourism, health care, and professional services jobs
- Agriculture, utilities declining; others all growing to various degrees

# POPULATION CHANGE

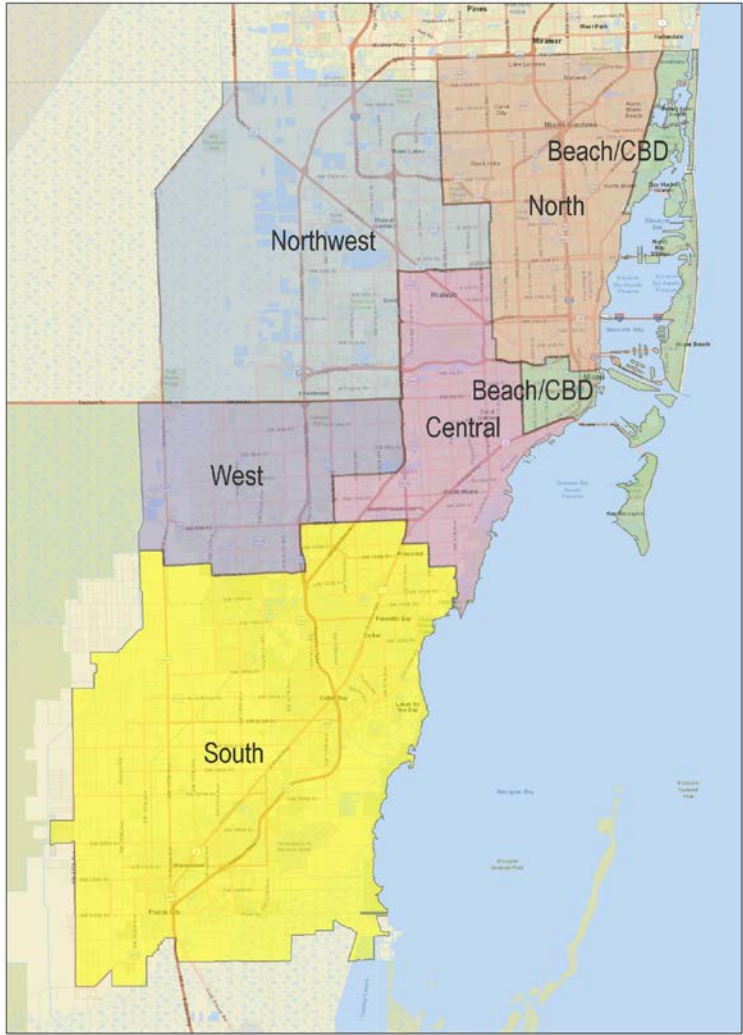
Planning Area	Growth 2015-2045	Proportion of New Population
Beach/CBD	154,400	17%
Central	109,800	12%
North	219,240	25%
Northwest	107,100	12%
South	231,400	26%
West	62,500	7%





# EMPLOYMENT CHANGE

Planning Area	Growth 2015-2045	Proportion of New Employment
Beach/CBD	81,100	17%
Central	75,600	16%
North	110,900	24%
Northwest	95,500	21%
South	68,500	15%
West	29,500	6%



# MUNICIPAL BREAKDOWN

Municipality	2015 Population*	2045 Population	2015 Employment*	2045 Employment
AVENTURA	37,800	50,800	26,300	34,700
BAL HARBOUR	3,300	5,300	2,600	3,300
BAY HARBOR ISLANDS	6,100	7,800	2,600	3,500
BISCAYNE PARK	3,100	3,700	300	300
CORAL GABLES	48,700	76,400	59,500	77,100
CUTLER BAY	43,600	55,200	9,500	12,800
DORAL	56,200	83,900	112,300	131,400
EL PORTAL	2,200	2,600	500	700
FLORIDA CITY	12,400	27,500	6,100	9,300
GOLDEN BEACH	1,000	1,300	100	200
HIALEAH	231,600	270,800	85,600	111,600
HIALEAH GARDENS	22,800	30,400	9,100	13,100
HOMESTEAD	66,900	118,900	16,100	29,400
INDIAN CREEK VILLAGE	100	200	100	200
KEY BISCAYNE	13,300	16,000	5,200	6,700
MEDLEY	800	1,800	23,700	31,900
MIAMI	423,400	641,900	273,800	383,200

- Miami, Homestead, Florida City among fastest risers
- Hialeah, Sweetwater among slowest growers
- Population growth generally higher than employment growth, but not always

*\* Estimated in GIS using adjusted base year data. May not align with Census estimates*

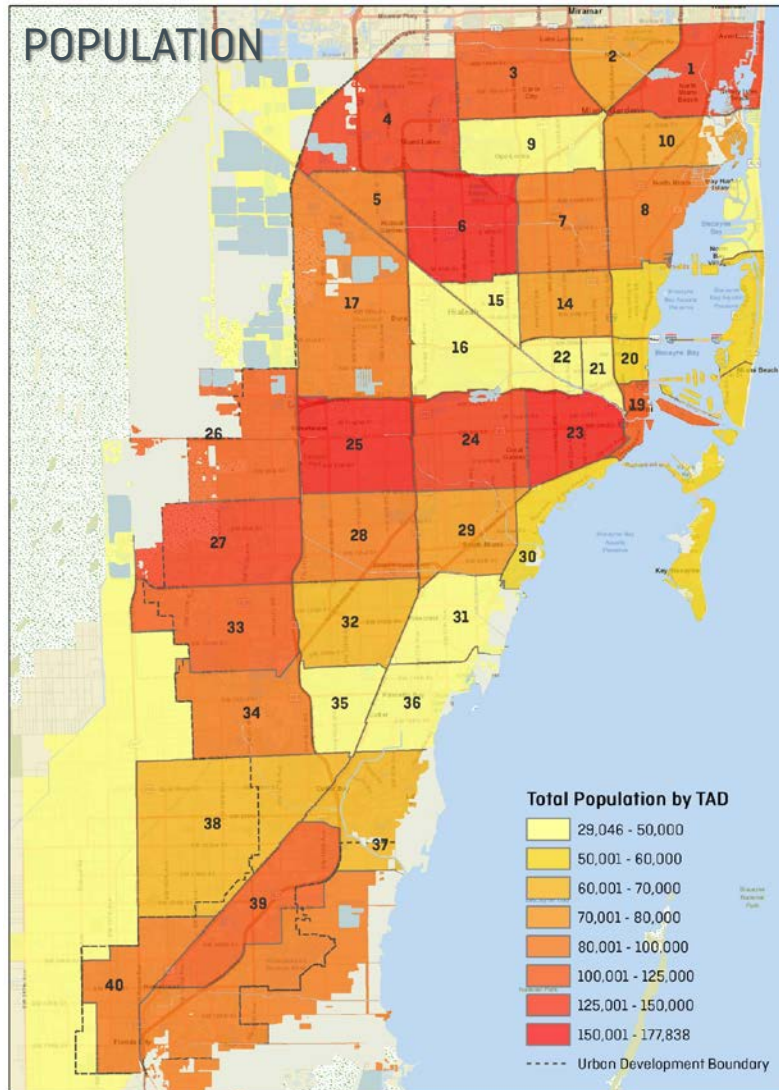
# MUNICIPAL BREAKDOWN

Municipality	2015 Population*	2045 Population	2015 Employment*	2045 Employment
MIAMI BEACH	92,500	122,400	69,200	87,300
MIAMI GARDENS	109,500	134,900	39,100	51,800
MIAMI LAKES	30,800	39,900	28,700	35,800
MIAMI SHORES	10,300	14,100	5,300	8,300
MIAMI SPRINGS	14,100	17,900	8,600	10,800
NORTH BAY VILLAGE	7,500	9,100	2,500	3,000
NORTH MIAMI	59,600	75,800	21,200	28,900
NORTH MIAMI BEACH	42,900	54,700	18,500	25,100
OPA-LOCKA	15,800	20,100	11,500	16,100
PALMETTO BAY	23,700	33,000	11,900	15,200
PINECREST	18,800	26,600	10,700	13,600
SOUTH MIAMI	11,000	17,300	15,700	20,800
SUNNY ISLES BEACH	23,100	28,900	7,000	9,400
SURFSIDE	6,000	6,700	1,800	2,100
SWEETWATER	20,900	23,100	14,300	16,100
UNINCORPORATED MIAMI-DADE	1,162,100	1,485,500	458,300	628,500
VIRGINIA GARDENS	2,500	2,900	2,600	2,900
WEST MIAMI	6,500	7,600	1,700	2,000

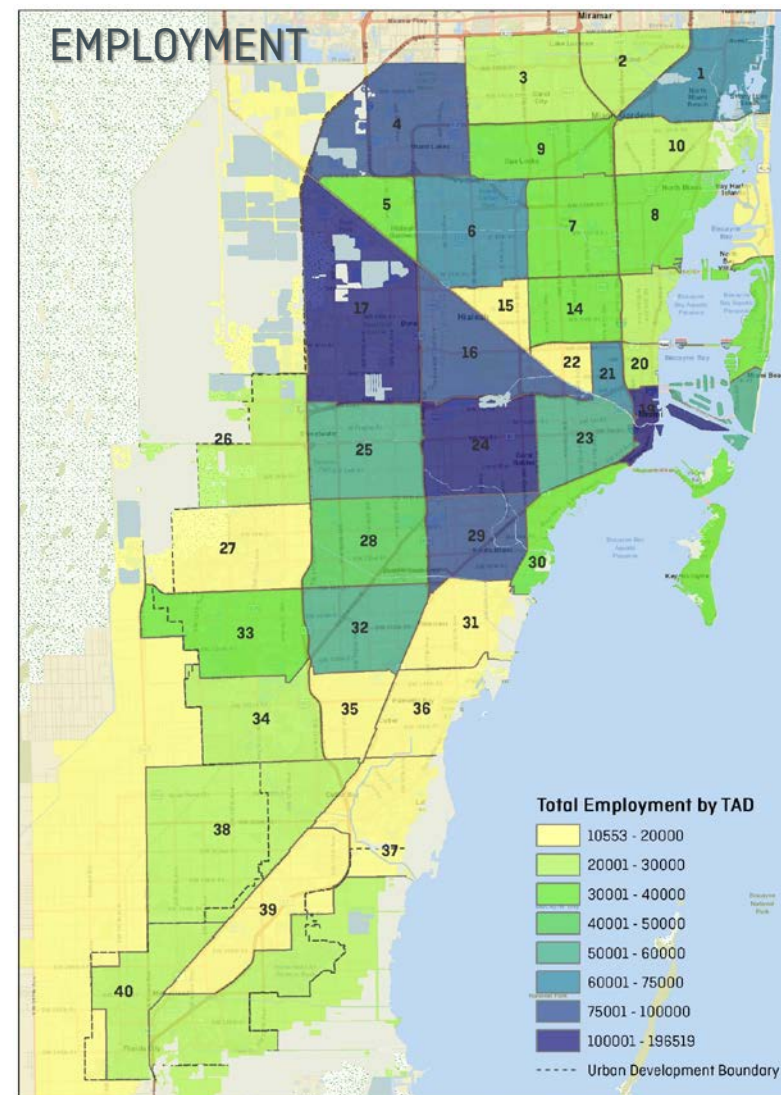
- Miami, Homestead, Florida City among fastest risers
- Hialeah, Sweetwater among slowest growers
- Population growth generally higher than employment growth, but not always

*\* Estimated in GIS using adjusted base year data. May not align with Census estimates*

# TOTAL POPULATION AND EMPLOYMENT BY TRAFFIC ANALYSIS DISTRICTS



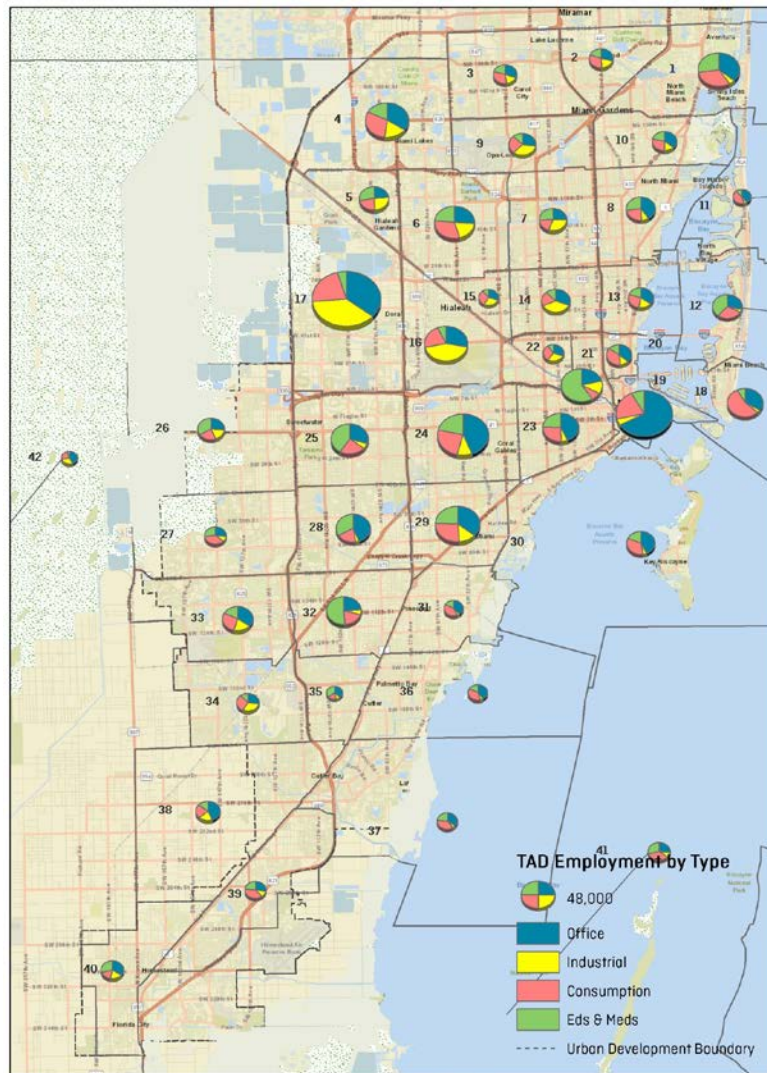
- All TADs have 25,000+ residents
- TADs for downtown, beach, and north of downtown among the fastest risers



- All TADs have 10,000+ jobs
- TADs for downtown, Homestead, American Dream among fastest risers

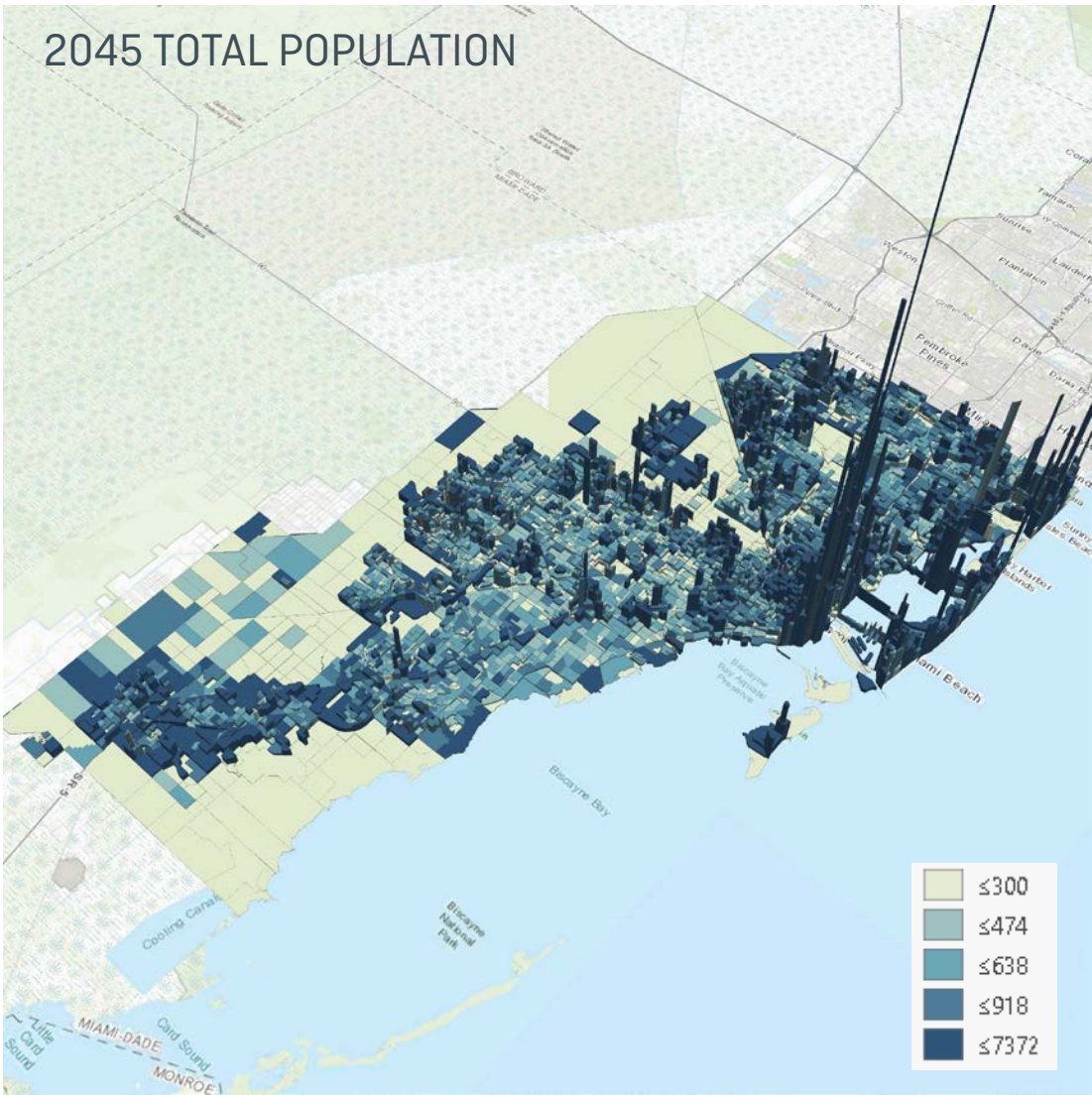
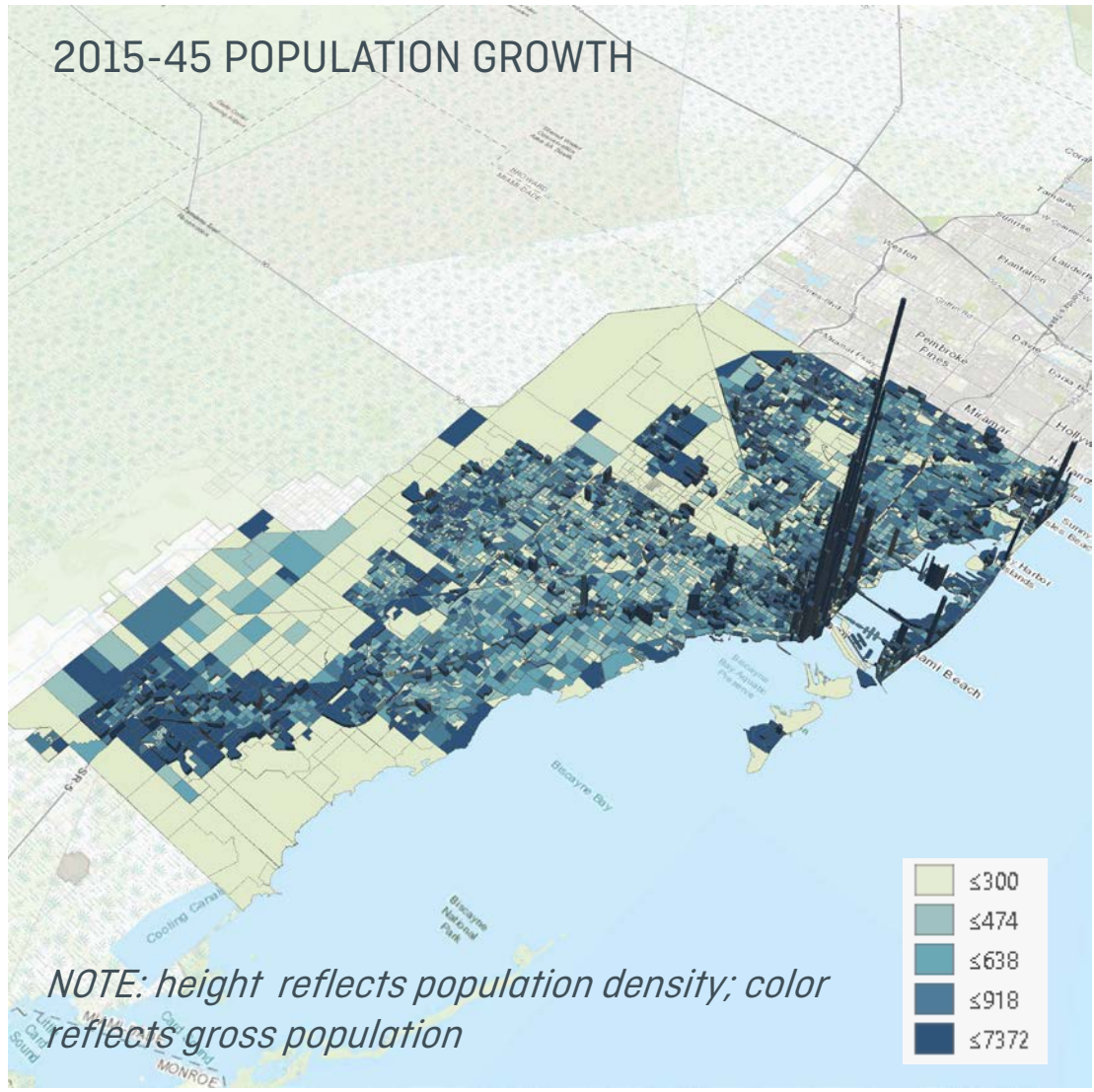


# EMPLOYMENT BY TYPE BY TAD



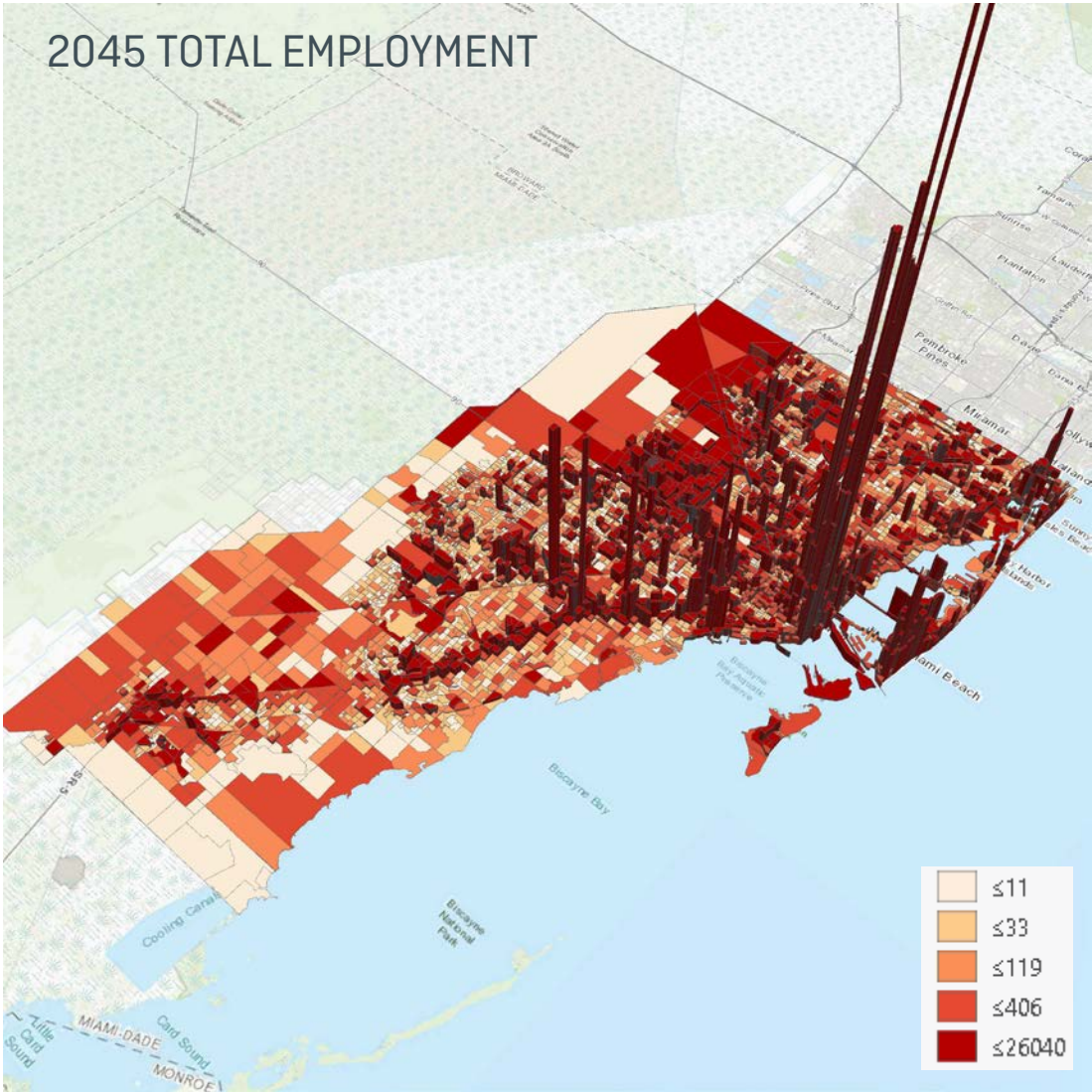
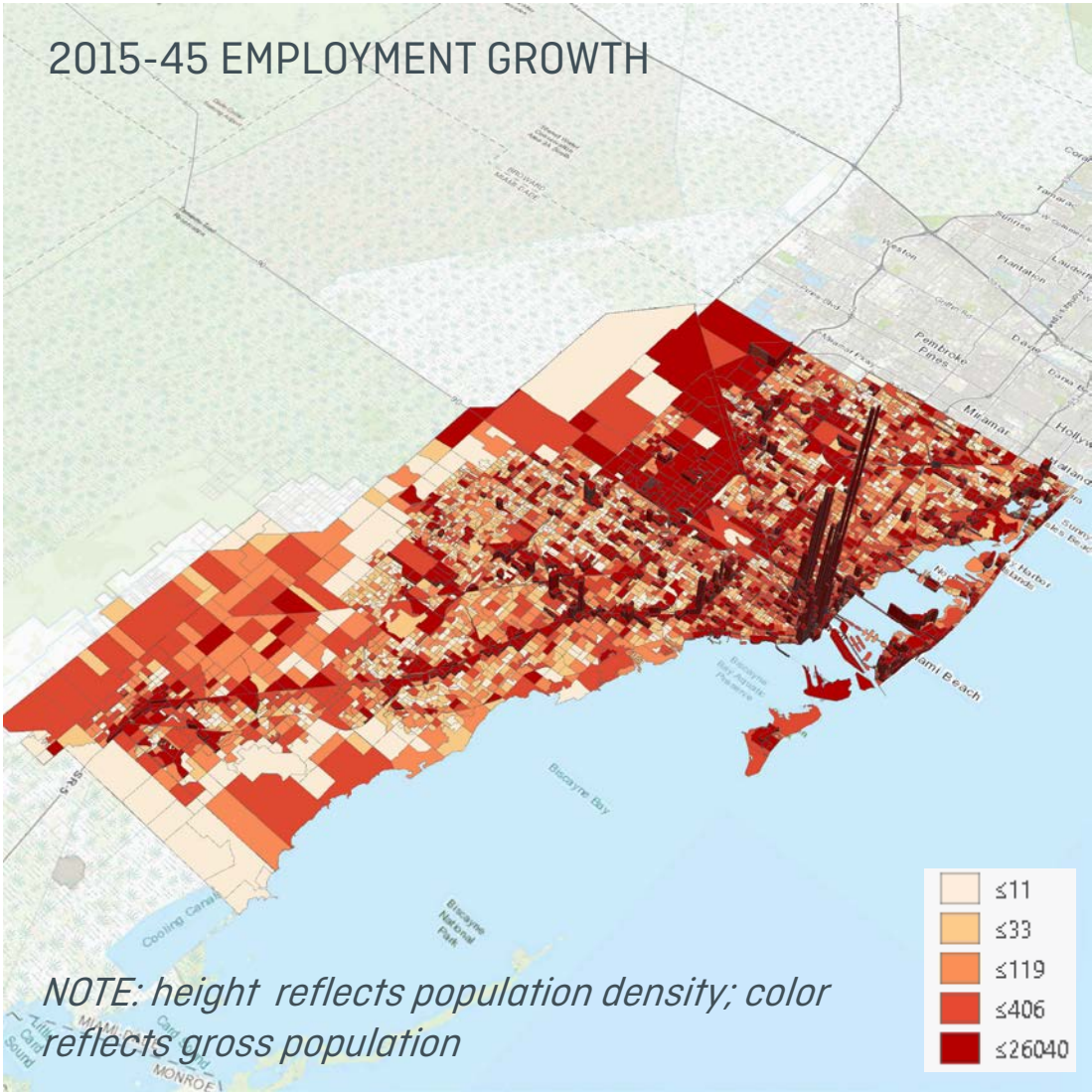
- Office and consumption uses are predominant along the water
- Industrial uses continue to be concentrated near ports and to the northwest
- All employment industries present in all 42 TADs

# POPULATION BY MAZ

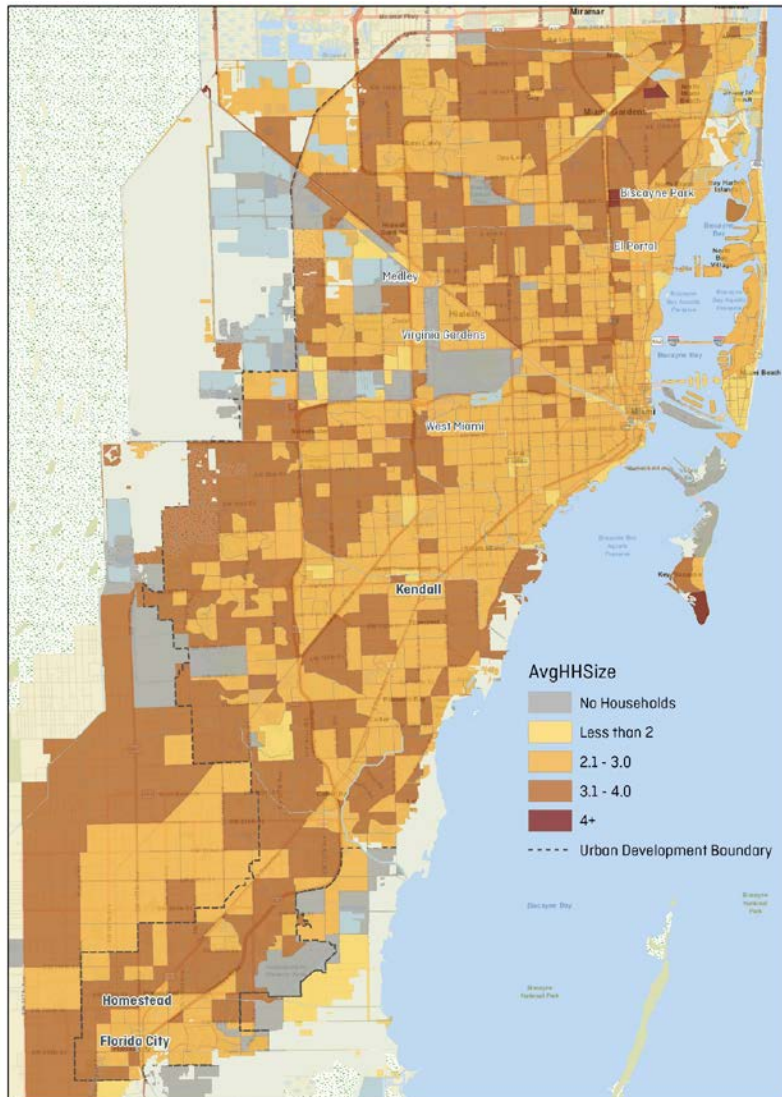




# EMPLOYMENT BY MAZ



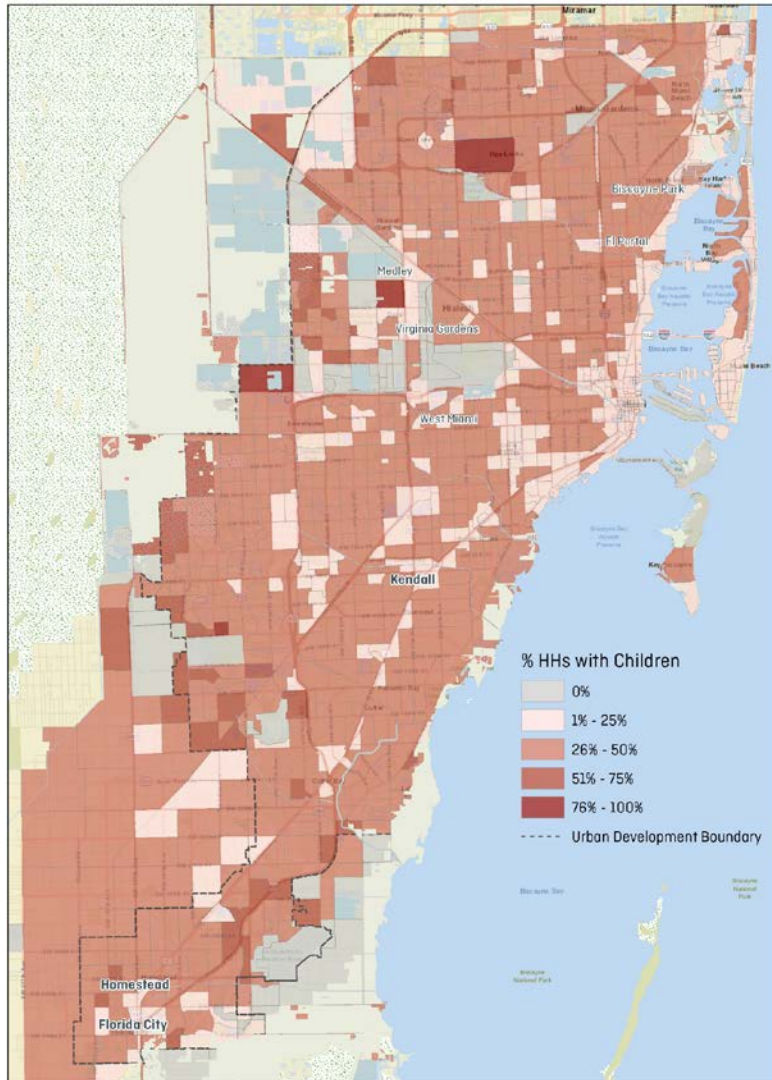
# HOUSEHOLD SIZE



- Household sizes are commonly 2-4 people, though there are pockets of smaller households in dense areas and among booming retiree pop
- HH sizes get bigger as you move to the outskirts
- HH size forecasted to decline over time (from 2.83 to 2.76)

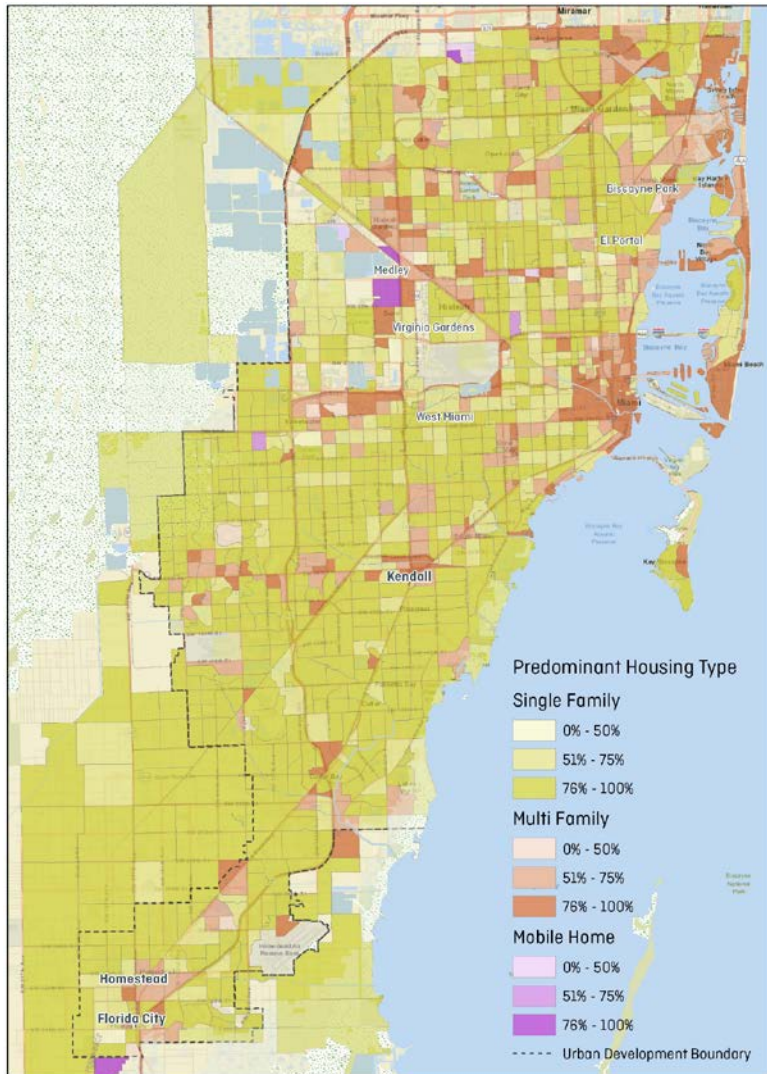


# HOUSEHOLDS WITH CHILDREN



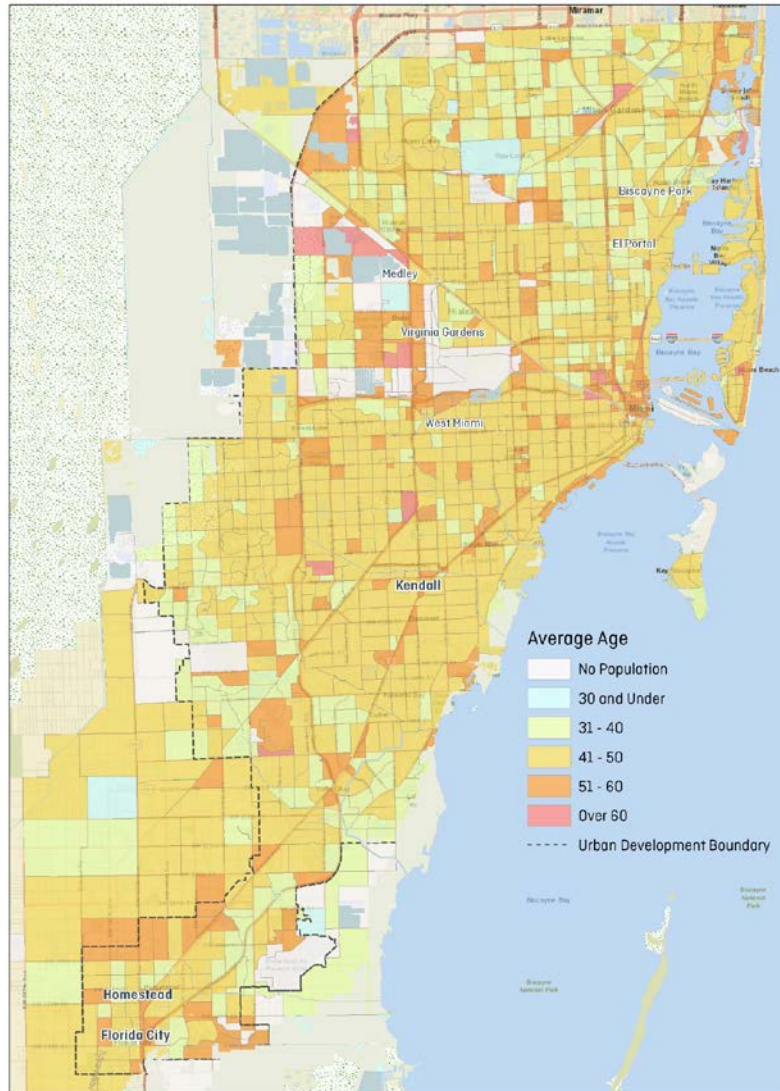
- Generally, most households do not have a child, though some small pockets of TAZs to the south have 50%+ households with children
- Overall percentage of households with children drops from 34% to 30%

# PREDOMINANT HOUSING TYPE



- Most of the region is still predominantly single family
- More locations are predominantly multi-family, and many of them are nearly all multi-family
- Near even split between new SF and MF housing, reducing percent SF from 57% to 55%

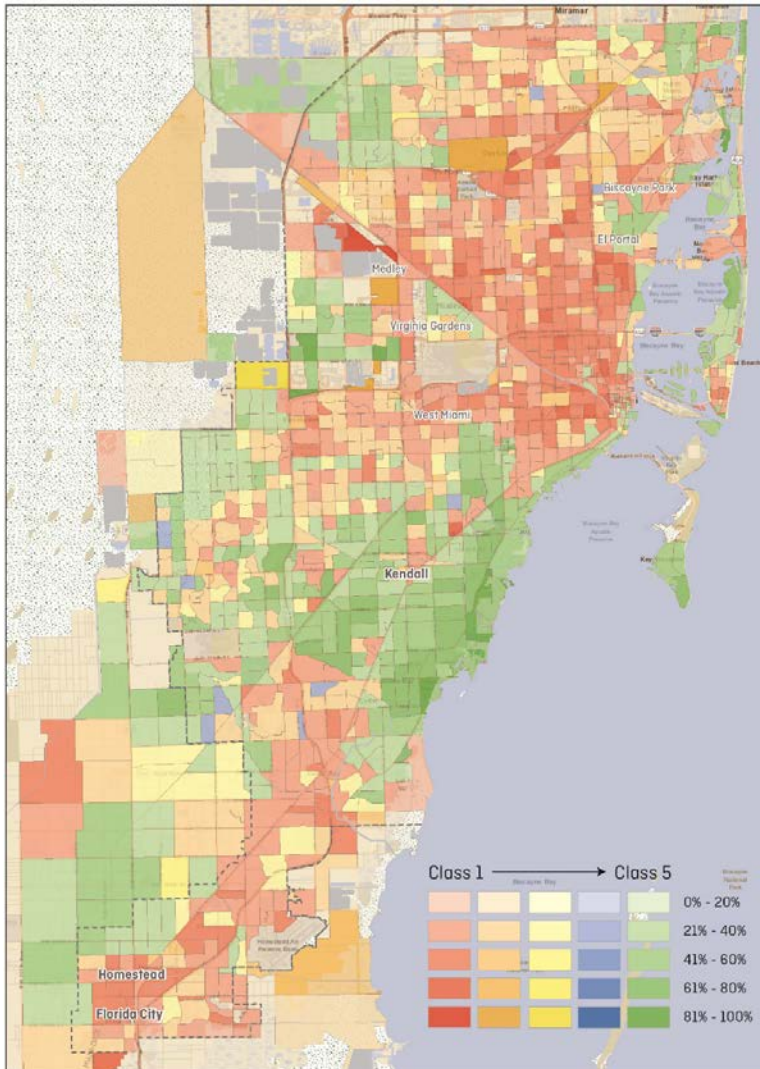
# AVERAGE AGE



- The County, like the nation, is expected to see increases in average age
- Strong connection between household size and average age
- Average age increases from 39 to 43

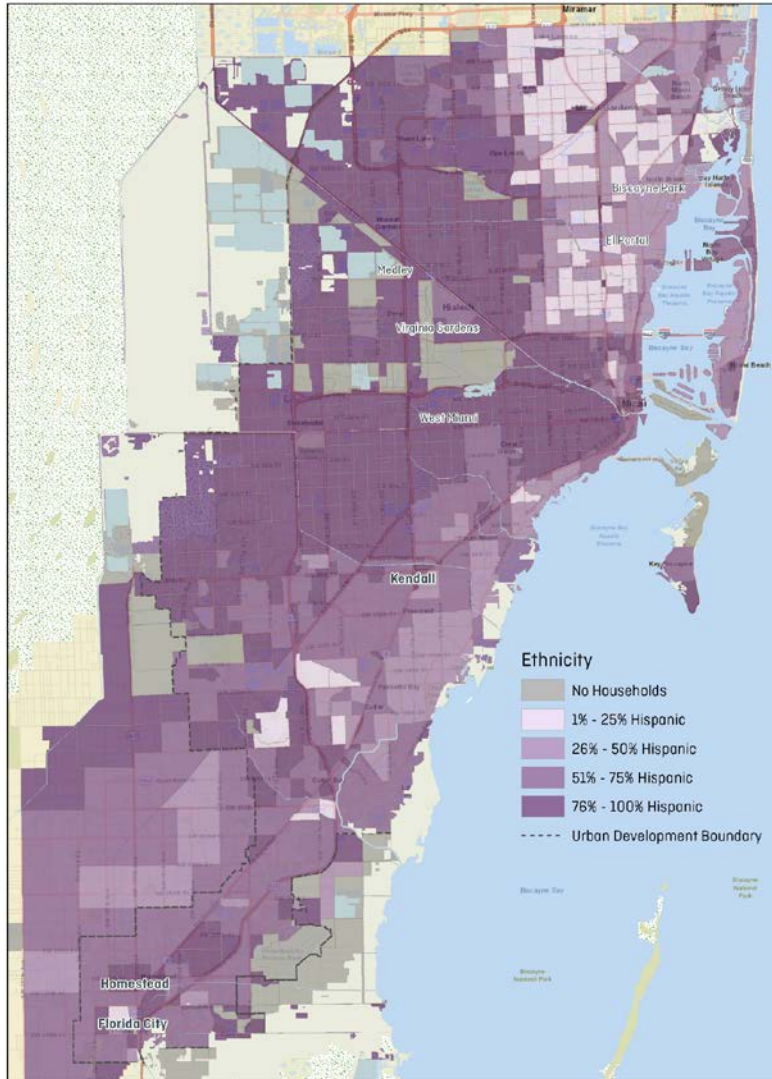


# PREDOMINANT INCOME CLASS



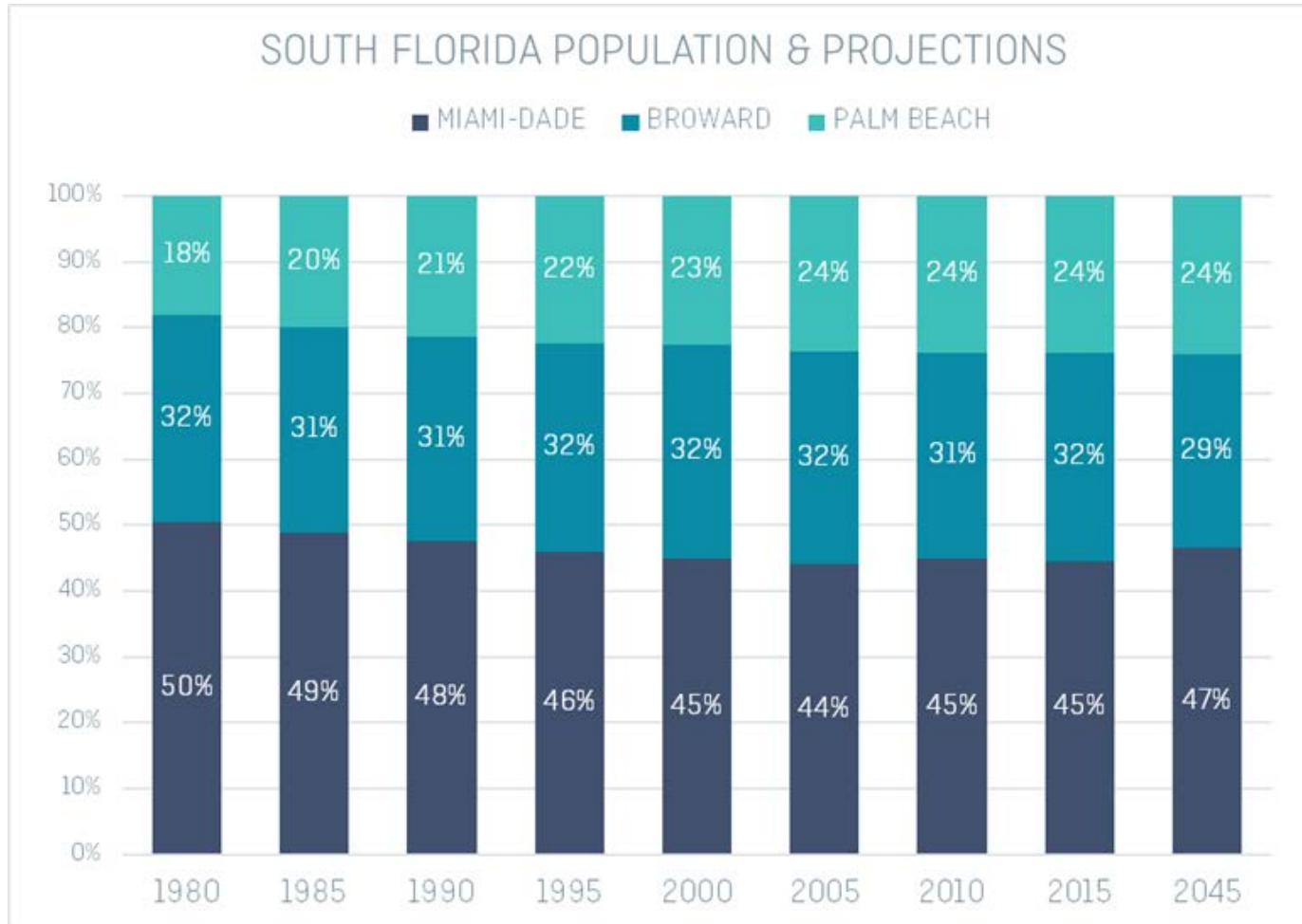
- Neighborhoods continue to be stratified by income, but not many places of extreme wealth or poverty
- Some new pockets of wealth, such as north of downtown, near American Dream
- Slight increases in Class 4 & 5, slight decreases in Class 1

# PREDOMINANT ETHNICITY



- Small increase in proportion of Hispanic population
- Continued stratification of ethnicity, mostly due to lack of data or method to suggest otherwise
- Proportion Hispanic rises from 67% to 69%

# REGIONAL POPULATION FORECASTS



- S. Florida counties have shared their 2045 population forecasts
- Miami-Dade is poised to accommodate a larger proportion of population growth in the future

# CONCLUSION

- Miami-Dade County is primed for continued growth
  - Its proportion of the region's population and jobs is forecast to increase
  - Growth is found in both urban and suburban areas
  - Miami-Dade's demographics are likely to see small shifts in age, income, ethnicity, HH size, etc.
- 
- Comments and questions are welcome:  
please provide by June 15th to

**Maria Teresita Vilches-Landa, P.E.**

TPO Project Manager

[Maria.Vilches@mdtpo.org](mailto:Maria.Vilches@mdtpo.org)

# THANK YOU!

