Greater Downtown Miami Development Pipeline Julia Tuttle Cswy 2,186 Condos 4,571 Apartments 2,483 Hotel Units Under Construction 209,050 SF Office 325,436 SF Retail 500,000 SF Meeting Shops at Midtown Miami AC Hotel by Marriott 3. AMLI @ Midtown Miami 4. Missoni Baia Midtown 6 Midtown Miami 3101 NE 1 Ave 777 NE 26 Ter 2900 NE 2 Ave 3400 Biscayne Blvd Developer: Midtown Developer: AMLI Developer: OKO Group | Developer: Midtown Group/Magellan OB Group | Cain Hoy Architect: Zyscovich **Architect:** Revuelta Architect: Kobi Karp **Architect:** BKL Architects Est. Completion: 2019 Architecture | Asymptot Est. Completion: 2019 Est. Completion: 2019 Apartments: 720 Architecture Hotel Units: 153 Est. Completion: 2020 Apartments: 447 **Retail SF:** 40,000 Condos: 249 **Greater Downtown Miami Overview** magellandevelopment.com missonibaia.com Market Demand - Consumer Expenditures Demographics The Bradley **6.** 545 wyn 7. Elysee Miami Miami Plaza 545 NW 26 St 1502 NE Miami Pl 51 NW 26 St 788 NE 23 St Total Population 92,235 Residents \$1.4 Billion **Developer:** Sterling Bay **Developer:** The Related **Developer:** Two Roads Developer: Melo Group Race and Ethnicity All Retail \$749.1 Million Architect: Gensler Est. Completion: 2021 \$123.4 Million % White 23% Apparel Architect: **Architect:** Arquitectonica Apartments: 425 **Office SF:** 209,050 % Black 13% Grocery \$274.8 Million Arquitectonica Est. Completion: 2020 **Retail SF:** 28,436 3% Household Furnishings \$107.9 Million % Asian Est. Completion: 2019 Condos: 100 545wvn.com Apartments: 175 1% \$70.1 Million elvseemiami.com % Other Music, Radio, Television Retail SF: 32,000 60% \$172.8 Million % Hispanic (any race) Personal Care bradleywynwood.com 37 \$300.6 Million Median Age Restaurants Total Households 47,958 \$1.6 Billion Workers & Visitors **Art Plaza Towers** 10. Retail @ Miami 11. Paramount Miami 12. Marriott Marquis Miami **Market Stability Business Environment** 58 NE 14 St Worldcenter Worldcenter Hotel & Expo @ Miami 700 N Miami Ave 700 N Miami Ave Worldcenter Income Profile All Businesses 11,113 **Developer:** Melo Group Architect: itecdesign Developer: Miami Developer: Daniel Kodsi 700 N Miami Ave 175,478 \$56,437 Median Household Income Employees Est. Completion: 2020 Worldcenter Associates | Art Falcone | Nitin **Developer:** MDM Group \$85,215 Average Household Income \$23.3 Billion Estimated Revenues Apartments: 667 Architect: N/A | Miami Worldcenter Motwani Medium and Large Business % Owner Occupied Housing 37% 411 **Retail SF:** 15,000 Est. Completion: 2019 **Architect:** Elkus Associates 72,785 % Renter Occupied Housing 63% Employees **Retail:** 140,000 artplazatower.com **Architect:** Nichols Estimated Revenues Educational Attainment \$9.9 Billior Est. Completion: 2019 miamiworldcenter.com Brosch | Wurst Wolfe & HEALTH 72,886 Total Population (25+) Micro & Small Business 10,702 Condos: 513 Associates DISTRICT 63,674 Higher Education 60% miamiworldcenter.com Est. Completion: 2019 Employees 250,757 \$13.4 Billion Hotel Units: 1,700 Daytime Population **Estimated Revenues** Meeting SF: 500,000 miamiworldcenter.com Source: Synergos Technologies - PopStats, Miami DDA, Social Compact 13. Miami Worldcenter 14. Luma at Miami 15. Park-Line Towers @ MiamiCentral Station MiamiCentral Station (total project) WorldCenter (total project) 700 N Miami Ave 148 NE 7 St 250 NW 1st St 40 NW 3 St 5 miles to M.I.A. Developer: Miami **Developer:** ZOM Group **Developer:** Florida East **Developer:** Florida East Worldcenter Associates Architect: ADD Inc. Coast Industries Coast Industries **Architect:** Elkus Est. Completion: 2021 Architect: SOM Architect: SOM Manfredi Apartments: 429 Architects Est. Completion: 2018 Est. Completion: 2019 Est. Completion: 2019 Apartments: 800 Apartments: 1,875 Apartments: 800 **Retail SF:** 217,000 **Office SF:** 319,00 Hotel Units: 2,050 virginmiamicentral.com **Office SF:** 500,000 park-line-living virginmiamicentral.com **Retail SF:** 300,000 Meeting SF: 500,000 miamiworldcenter.com **MIAMI BEACH** 17. X Biscayne 18. YotelPad 19. Aston Martin 20. Brickell World Plaza Residences 400 Biscayne Blvd 227 NE 2 St 44 SE 6 St Developer: Greybrook **Developer:** Aria 300 Biscayne Blvd Way Developer: Brickell Realty Partners & PMG Development Group Developer: G & G World Center **Architect:** Sieger Suarez Architect: ADD Inc. Architect: HOK Est. Completion: 2021 Condos: 215 Architect: BMA & Est. Completion: 2019 Apartments: 646 Hotel Units: 250 Revuelta Architecture **Retail SF:** 15,000 Est. Completion: 2019 xmiami.co votelpadmiami.com brickellworldplaza.com Condos: 390 astonmartinresidences.com Flagler St Shopping District 21. Smart Brickell 22. Brickell Flatiron 23. Hotel Indigo 24. Maizon at Brickell 229 SW 9 St 1001 S Miami Ave 145 SW 11 St 237 SW 12 St **Developer:** CMC Group **Developer:** SunView Developer: Habitat Developer: ZOM Companies | HES Group **Architect:** MSA Architects Architect: Hernando **Architect:** Luis Revuelta Est. Completion: 2019 Architect: Kobi Karp Est. Completion: 2019 Est. Completion: 2018 Apartments: 262 Condos: 170 Condos: 549 Hotel Units: 230 **Retail SF:** 15,000 Hotel Units: 150 **Retail SF:** 40,000 smartbrickell.com brickellflatiron.com **Brickell City Centre** 1.114 Condos • 2.164 Hotel Units • 236 Condo-Hotel Units Planned* 619,094 Office SF • 463,807 Retail SF • 34,414 Meeting SF • 72 Theater Seats Regional Catchment Area Overview BROWARD **15 MIN 30 MIN** Demographics 2. Island Gardens Jungle Island 3. CitizenM at Miami 4. Okan Tower 950 MacArthur Cswy WorldCenter 1,388,208 1,869,157 1111 Parrott Jungle 555 N Miami Ave Total Population Mary Brickell Village Developer: Flagstone Developer: Turkish Okan 155 NE 10 St Race and Ethnicity Developer: Jungle Developer: Miami World % White 13% MIAMI-DADE Architect: Eric Kuhne Architect: Behar Font & Center & CitizenM 24% % Black 26% Architect: EoA Hotel Units: 600 Partners Architect: Gensler % Asian 1% **Retail SF:** 220,000 Hotel Units: 300 Hotel Units: 351 Condos: 149 2% % Other Condo-Hotel Units: 236 islandgardens.com miamiworldcenter.com 58% 56% % Hispanic (any race) Hotel Units: 293 Office SF: 64,000 38 Median Age theokantowermiami.com 457,684 Total Households 656,621 Natiivo 6. Skyrise Miami 7. OD Miami (Dade One River Point **15 MIN 30 MIN Market Stability** 169 NE 6th St 401 Biscayne Blvd Commonwealth (River Village Phase I) Income Profile MIA) Developer: NGD **Developer:** Berkowitz Building) 400 S Miami Ave Median Household Income \$44,284 \$55,823 Homesharing & 139 NE 1 St Developer: Kar \$68,913 \$79,386 **Architect:** Arquitectonica Average Household Income Crescent Heights Developer: Dream Properties Architect: **Meeting SF:** 10,123 Downtown Miami LLC | Architect: Rafael Vinoly % Owner Occupied Housing 56% 67% **Retail SF:** 174,340 Arquitectonica OD Hotels Condos: 426 33% % Renter Occupied Housing 44% Condos: 400 **Event SF:** 24,291 **Retail SF:** 30,000 Hotel Units: 168 Educational Attainment Hotel Units: 200 Restaurant SF: 39,467 od-hotels.com oneriverpoint.com Total Population (25+) 935,668 1,298,031 natiivomiami.com Theater Seats: 72 Higher Education 37% 43% skyrisemiami.com **15 MIN 30 MIN KEY BISCAYNE** Market Demand 830 Brickell 10. CitizenM 11. Una Residences 830 SE 1 Ave 15 SE 10 St 175 SE 25 Rd Total Expenditures (Residents) Developer: OKO Developer: CitizenM **Developer:** OKO All Retail \$5.8 Billion \$9.3 Billion Office SF: 555,094 Hotel Units: 252 Architect: Adrian \$870 Million \$1.4 Billion Apparel Smith & Gordon Gill citizenm.com Downtown Miami \$2 Billion \$3.2 Billion Grocery Architecture \$757 Million \$1.2 Billion Household Furnishings Condos: 135 **Drive Times from Downtown Miami** \$514 Million Music, Radio, Television \$822 Billion unaresidences.com \$312 Million \$520 Billion Personal Care 15 Minutes \$1.3 Million \$2.2 Billion * Residential projects listed under "Planned" are either pre-leasing, taking reservations or contracts. Restaurants 30 Minutes Non-residential projects under "Planned" have filed permits with the City of Miami Buidling Department.

Recently Completed (not shown on map)
2017

Patricia & Philip Frost

Museum of Science

Museum SF: 250,000

Retail SF: 8,045

Midtown 29

Apartments: 300

Retail SF: 2,791

Brickell Ten

Condos: 155

Retail SF: 13,952

1	Recently Co	ntly Completed (not shown on map)											
2017 1,821 Condos • 723 Apartments 179,988 SF Retail • 250,000 SF Museum				2018 3,064 Condos • 2,733 Apartments • 328 Hotel Units 370,000 SF Office • 146,394 SF Retail					2019 516 Condos • 2,139 Apartments 90,000 SF Office • 118,266 SF Retail • 1,780 Theater Seats				
	Eve Apartments: 195 Retail SF: 63,000	Broadstone at Brickell Apartments: 372	2121 Wynwood Condos: 10 Retail SF: 7,200	Brickell Heights Condos: 690 Retail SF: 85,000	Hyde Hotel & Residences Condos: 337 Hotel Units: 60 Retail SF: 21,745	Aria on the Bay Condos: 647 Office SF: 35,000	Square Station Apartments: 710 Retail SF: 15,000	PanoramaTower Hotel Units: 208 Apartments: 821 Retail SF: 50,000 Office SF: 50,000	2 MiamiCentral Office SF: 190,000	Gran Paraiso (Paraiso Bay - Tower 2) Condos: 317	Yard 8 Apartments: 387 Retail SF: 30,000	The Edgewater Condos: 30	Blu27 Apartments: 330 Retail SF: 9,600
	Echo Brickell Condos: 180	Biscayne Beach Condos: 399	1010 Brickell Condos: 387	2500 Biscayne Apartments: 156	One Paraiso Condos: 276	Paraiso Bayviews Condos: 396	X Miami Apartments: 464	Solitair Brickell Apartments: 438	SLS Lux Condos: 535	26 Edgewater Condos: 86	Modera Edgewater Apartments: 297	Wynwood 25 Apartments: 289	Cube Wynwd Retail SF: 10,000

Retail SF: 7.000

Condos: 360

Paraiso Bay - Tower

3 MiamiCentral

Office SF: 95,000

Retail SF: 35,000

Retail SF: 7,649

Condos: 513

Retail SF: 10,000

Hotel Units: 60

Caoba @ Miami

Apartments: 444

Worldcenter

Total 2014 - 2019 9,661 Condos • 8,604 Apartments • 730,141 SF Office 1,081,205 SF Retail • 1,369 Hotel Rooms • 250,000 SF Museum • 1,780 Theater Seats

Office SF: 260,000

Retail SF: 604,800

Condos: 888

Apartments:1,157

Hotel Units: 142

Office SF: 10,141

Retail SF: 3,257

Retail SF: 31,000

1000 Museum

Condos: 83

Muze at Met Square

Theater Seats: 1,780

Apartments: 392

Retail SF: 37.666

Office SF: 90,000

Condos: 1,246

Condos: 2,209 Condos: 1,821 **Condos:** 3,064 **Retail SF: 28,500** Apartments: 1.852 Apartments: 723 Apartments: 2.733 Hotel Units: 899 **Retail SF:** 179,988 Hotel Units: 328

Museum SF: 250,000

Condos: 516 Apartments: 2,139 Office SF: 90,000 **Office SF:** 370,000 **Retail SF:** 118,266 **Retail SF:** 146.394 Theater Seats: 1,780

TRANSPORTATION & INFRASTRUCTURE*

June 2019

STH9ISNI **MARKET**

Our Mission:

The Miami Downtown Development Authority's mission is to grow, strengthen and promote the economic health and vitality of Downtown Miami.

As an autonomous agency of the City, the Miami DDA advocates, facilitates, plans and executes business development, planning and capital improvements, and marketing and communication strategies.

We commit to fulfill our mission collaboratively, ethically and professionally, consistent with the Authority's public purpose.

200 S. Biscayne Boulevard, Suite 2929 Miami, FL 33131 T: 305.579.6675

F: 305.371.2423

www.miamidda.com downtownMIA

downtownMIA

downtownMIA



College North

Eighth Street

Freedom Tower

Source: Miami-Dade Transit Authority, 2019 Ridership Report, as of April 2019.



Total monthly system ridership for downtown stations 451,412 Other Average Monthly Ridership Brightline Miami Trolley* CitiBike incoming* CitiBike outgoing* *Ridership for Greater Downtown stations only Average Monthly Metromover Ridership (total system ridership 738,850) Adrienne Arsht Center 43,279 Eleventh Street Government Center Riverwalk Bayfront Park Fifth Street **Knight Center** School Board Brickell Financial District Miami Avenue Tenth Street College / Bayside First Street Museum Park Third Street

Park West

Wilkie D. Ferguson, Jr. 12,80°

Existing

🚻 MiamiCentral Station / Brightline

Brightline/Virgin Trains is a privately developed, operated, and maintained high-speed, intercity passenger rail service that commenced service in January 2018. Brightline provides high-speed connections to Miami, Ft. Lauderdale, and West Palm Beach. MiamiCentral Station is Brightline's grand station in Downtown Miami with onsite retail, office, and residential space. Brightline rebranded as Virgin Trains USA in April 2019. Service to Orlando/Disney and Tampa are currently in the works. www.gobrightline.com

Metrorail is a 23-station, 25-mile elevated rapid transit system serving Miami-Dade County, with direct service to Downtown Miami, Miami International Airport, Kendall/Dadeland, South Miami, Coral Gables, the Health District, and various communities in northwest Miami-Dade; and connecting service to Broward and Palm Beach counties via the Tri-Rail/Metrorail transfer station. www.miamidade.gov/transit/metrorail.asp

The Metromover is a FREE, 21-station, 4.4-mile automated people mover system in Downtown Miami, with connections to Metrorail at the Government Center and Brickell stations, and to Metrobus at various locations throughout downtown. The system connects nearly all of Downtown's neighborhoods and destinations, including the American Airlines Arena, Bayside Marketplace, Pérez Art Museum Miami and the Patricia & Phillip Frost Museum of Science, Miami Dade College, Museum Park, Mary Brickell Village, and the Adrienne Arsht Center for the Performing Arts. www.miamidade.gov/transit/metromover.asp

The Miami Trolley is a comprehensive, City-wide rubber-tire trolley system, with three loops serving Downtown Miami covering Brickell, the Central Business District, the Arts & Entertainment District, and PortMiami. The trolleys are FREE and run from 6:30am until evening hours depending on routes. Download the updated APP on your phone! www. miamigov.com/trolley/Tracker.html

Citi Bike Bike Sharing Program

The Citi Bike program is Miami's bike sharing and rental system, consisting of a fleet of bikes that are locked into a vast network of docking stations located throughout Miami and Miami Beach. With a thousand bikes, a hundred stations and more on the way, bikes are available to use 24 hours a day, 365 days a year. www.citibikemiami.com

Dockless Scooters

In October 2018, the Miami City Commission approved a one-year pilot program for electric motor scooters in downtown Miami, Brickell, and Coconut Grove. Companies taking part in the pilot program include Bird, Bolt, Jump, Lime, Lyft and Spin. Ultimately the hope is scooters can provide downtown residents and commuters a safe, affordable, and environmentally friendly alternative to cars, reducing traffic congestion (and therefore carbon emissions), and serve as a catalyst for a more robust and connected bike lane network. https://www.miamigov.com/Services/Transportation/Miami-Scooter-Pilot-Program

Downtown's first Complete Street -- SE/SW 1st Street
In August 2017, the DDA with its partners, Miami-Dade County and the city of Miami, launched a 12-month pilot of downtown's first Complete Street featuring dedicated bus and bike lanes. Through this demonstration street for people, the DDA hopes to accommodate our growing population by using all modes. The DDA partnered with the City of Miami Police on education and enforcement of the new alignment. After one year, the Miami DDA evaluated the outcomes of this experiment and found that crashes have been reduced by 65%, increased bicycle volumes by 40%, improved travel times and nominally changed bus operations. Furthermore, the corridor experienced economic growth in the first year as well.

Baywalk / Riverwalk

The Miami Baywalk and Riverwalk are the connected/overlapping publicly accessible pedestrian corridors for walking and biking along Downtown Miami's two beautiful waterfronts: Biscayne Bay and the Miami River. Within the Miami DDA's boundaries, the Baywalk is 88% complete and the Riverwalk is 65% complete. Furthermore, after engaging the public in a dialogue about how to make the Baywalk/Riverwalk greater assets to downtown, the Miami DDA has created the Unifying Design Elements and Waterfront Guidelines that will create a continuous and cohesive experience for all to enjoy.

Highlighting the need to create streets for people, the transformation of NE 3rd Ave between Flagler and 1st Streets gave residents, visitors, and employees a community gathering space. In October, the City of Miami, Miami Parking Authority, Miami-Dade's Quick Build Challenge program and the Miami DDA came together to paint AVE 3, install a parklet and planters and host more than 600 people for dinner, conversation, games, and music in the street. Based on the overwhelming success, Steve Dutton, downtown resident and volunteer leader, plans to host another community event in fall 2019. www.avenue3miami.org

Coming Soon

Tri-Rail Downtown Miami Link

Miami DDA invests in public transportation projects to enhance access to Downtown and alleviate traffic. The Tri-Rail Downtown Miami Link is an extension of the current Tri-Rail commuter train into Downtown Miami being developed alongside Brightline/Virgin Trains' MiamiCentral Station. In 2016, the Miami DDA Board of Directors unanimously approved funding in support of the Tri-Rail Downtown Link in the amount of \$1.27M and expects to realize this critical connection in 2020, as soon as it completes its Positive Train Control (PTC) testing. Construction of the Downtown Tri-Rail station was completed in early 2019. www.

▲ ▲ Flagler Streetscape Beautification Reconstruction

Highlighting Flagler Street's historic and distinct heritage as Miami's iconic main thoroughfare, the Miami DDA, together with the City of Miami, Miami-Dade County and the property owners of Flagler Street have all committed to contribute additional funding to achieve a curbless Festival street to encourage pedestrian activity. The City of Miami Commission voted to approve this enhanced project in July, which should prompt construction in Fall of 2019.

■ ■ Baywalk / Riverwalk

As one of the first steps into highlighting the new Unifying Design Element & Waterfront Guidelines, the Miami DDA is partnering with the City of Miami, the NFL and Bayfront Park Management Trust to install 36 new Baywalk lights with LED light strips and programmable color controls. They are scheduled to be installed in time for Super Bowl 2020 and Super Bowl Live, which will be hosted in Bayfront Park in February 2020.

The Underline's vision is to transform the underutilized land in the urban core below Miami's Metrorail into a 10-mile neighborhood park, urban trail, and living art destination. The Underline will connect communities, improve pedestrian and bicyclist safety, promote healthy living, and create over one hundred acres of open space with restored natural habitats. The first phase of the project commences from the Miami River south to SW 13th St broke ground in December 2018 and is expected to complete in 18 months. www.theunderline.org

In The Works (planned)

Biscayne Green

Biscayne Green is a long-term vision to redesign Biscayne Boulevard through Downtown to include a pedestrian promenade, enhancing connectivity and safety, and providing multi-modal options. In January, 2017, the Miami DDA, together with its partners including Knight Foundation, the Miami Parking Authority and the Miami Foundation, hosted a public space intervention to show the impacts of this gray to green transformation. From this overwhelming positive experience, the Miami DDA will work with the Florida Department of Transportation FDOT), the City of Miami, Miami Parking Authority and Miami-Dade County to conduct a Lane Elimination analysis, which is expected to be completed in 2020. The findings of this study will be used to justify construction of Biscayne Green. www.biscaynegreenmiami.com

The SMART (Strategic Miami Area Rapid Transit) Plan entails six priority transit corridors in Miami- Dade County. By advancing the SMART Plan, DDA hopes to offer all residents and employees more car-free options to get downtown. While downtown is the most accessible neighborhood by transit, large population centers still must rely on their car to get here. The TPO will prioritize resources to build these corridors first. Additionally, the Miami Dade Expressway Authority has announced plans to begin rapid transit service on the shoulders of SR 836. Finally, the realization of Tri-Rail service Downtown will help realize the Northeast Corridor. www.miamidadetpo.org

For additional information, visit www.miamidda.com