



MIAMIBEACH

2007 Community Satisfaction Survey (CSS) Report of Results

Prepared for:

Mayor Dermer and City Commissioners
Miami Beach, Florida

April 2007 updated May 9, 2007

Agenda

- Overview and Research Objectives
- Methodology
- Results by Survey Category
 - Overall Quality of Life
 - City Services
 - Getting Around the City
 - Safety
 - Culture, Entertainment and Tourism
 - Economy/Taxes
 - Communications/Customer Service
- Key Drivers of Community Satisfaction
- Final Summary
- Next Steps

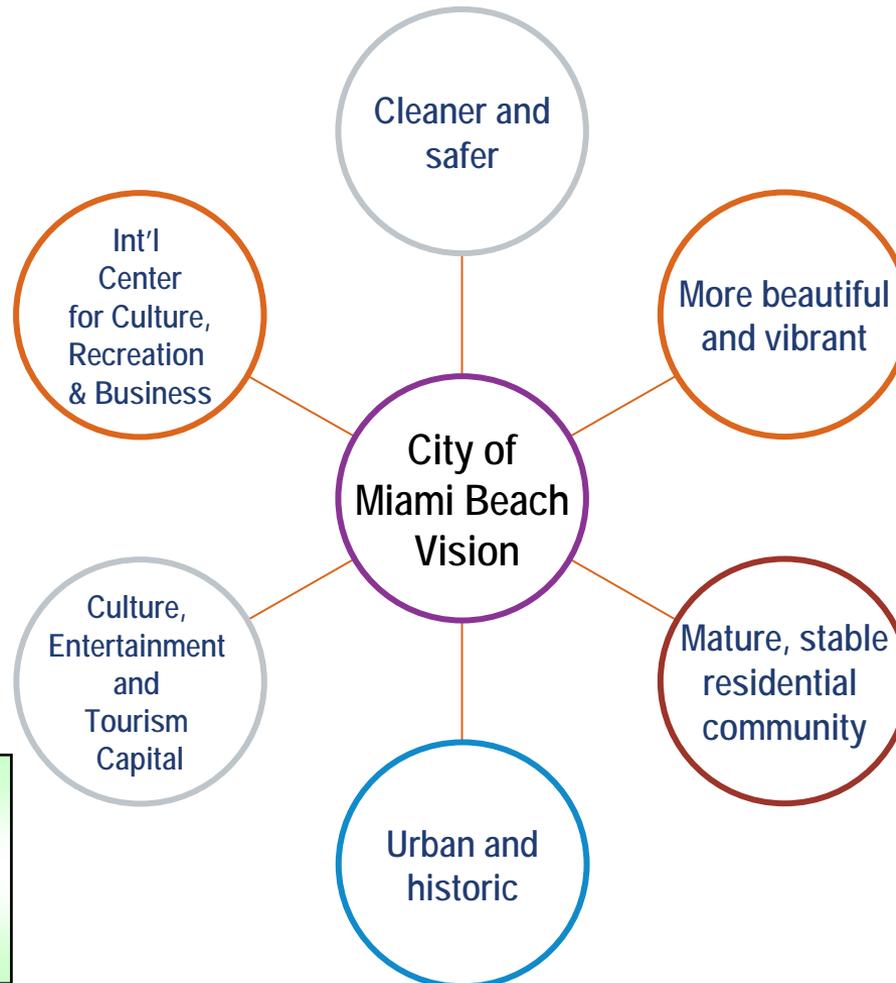
***Overview and Research
Objectives***

Overview and Research Objectives

- Understand satisfaction among City of Miami Beach residents and businesses with quality of life in the City, services received, City government, and recent initiatives
- Measure change since the 2005 Community Satisfaction Survey
- Benchmark Miami Beach to similar cities/jurisdictions
- Determine areas of strength and opportunities for improvement
- Utilize community input to support the budget process
 - Provide actionable data to make decisions

City's Mission, Vision and Strategic Plan

- **Mission Statement:** “Committed to providing excellent public service and safety to all who live, work and play in our vibrant, tropical, historic community”



Reflect on:

- What's improved/
declined?
- Where gaps remain?

Methodology

Project Review – Key Steps and Milestones

<u>Step</u>	<u>When</u>
1) Survey Planning (work plan, communications)	October/November 2006
2) Questionnaire Development (interviews, re-design, translation)	Late November to Early December 2006
3) Administration Preparation (sample list development)	Late December 2006 – Early January 2007
4) Survey Administration (telephone/mail)	January 8 – 29
5) Data Processing and Analysis	February – April
6) Report Preparation & Delivery to City Mayor & Commissioners	April 27

Overall Survey Methodology

- Two similar but distinct questionnaires
 - Resident: 89 multiple-choice; 3 ‘write-in’
 - Business: 75 multiple-choice; 1 ‘write-in’
- Both surveys conducted:
 - Using a telephone methodology
 - With calls made during the daytime, evenings and weekends (except for Friday evening/Saturday morning)
 - By experienced English and Spanish interviewers
 - Following a customized sampling plan
- Average time for participants to complete the survey
 - Residents = 21 minutes
 - Businesses = 17 minutes
- A supplemental mailing to 500 residents without landline phones was also performed

Overall Survey Methodology (cont'd)

- Who was contacted?
 - Residents: A random sample containing 5,000 residents in:
 - **1. Condo “Corridor” in Middle Beach**: 22nd to 63rd Sts along Collins Ave – east of Indian Creek
 - **2. Mid Beach and the Islands** (Palm, Star, Hibiscus, Sunset I, Sunset II): 22nd to 63rd Sts from North Bay Road to Collins Ave and incl. the Islands
 - **3. North Beach**: 64th to 87th Terrace from Collins Ave to City limits along the Bay
 - **4. South Beach and Belle Isle**: 5th to 21st Sts from West Ave to Ocean Dr/Collins Ave
 - **5. South Pointe**: 1st to 5th Sts from Alton Rd to Ocean Dr
 - Businesses: A sample containing 4,731 businesses contacted, sampled by the 3 main regions of the City (North, Mid, South)

Reliability of the Data: Resident Survey

- Response rate identical to 2005
 - Hay Group received **1,050** completes out of 5,000 contacted
 - In 2005, 1,053 responses out of 5,000
 - Participation Rate = 21%
- Responses provide for a confidence estimate of 95%, +/- 3%
 - Resident data weighted by region, gender, race and age to reflect population census demographics
 - Reliability at region level is +/- 7%

Respondent Profile: Resident Survey

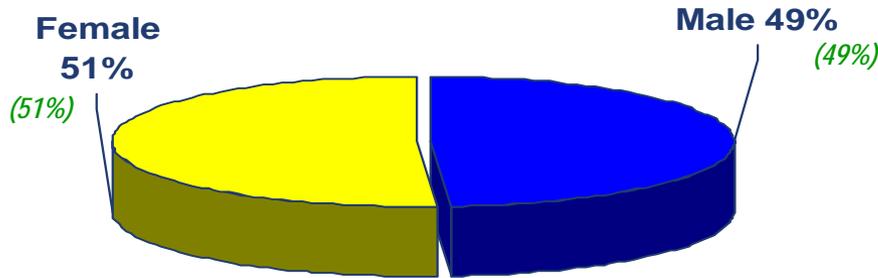
	<u>English</u>	<u>Spanish</u>	TOTAL
Condo Corridor	121	85	206
Mid-Beach	194	18	212
North Beach	111	103	214
South Beach	120	90	210
South Pointe	155	53	208
TOTAL	701	349	1,050

Target by region was 200 completed responses

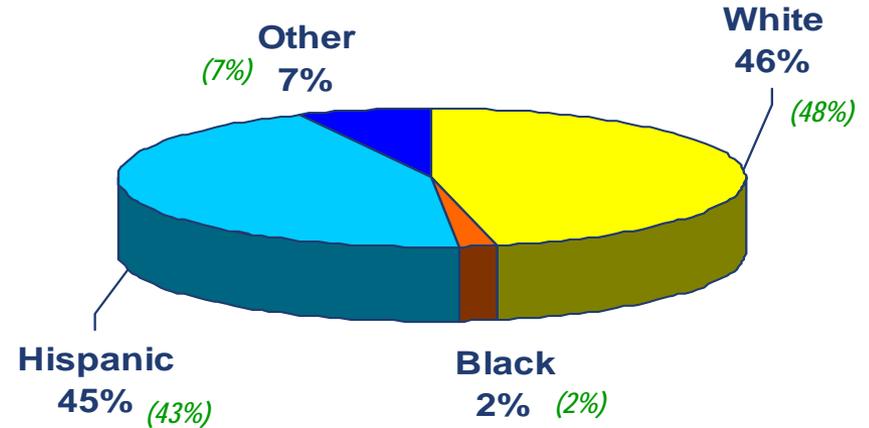
Respondent Profile: Resident Survey

2005 percentage

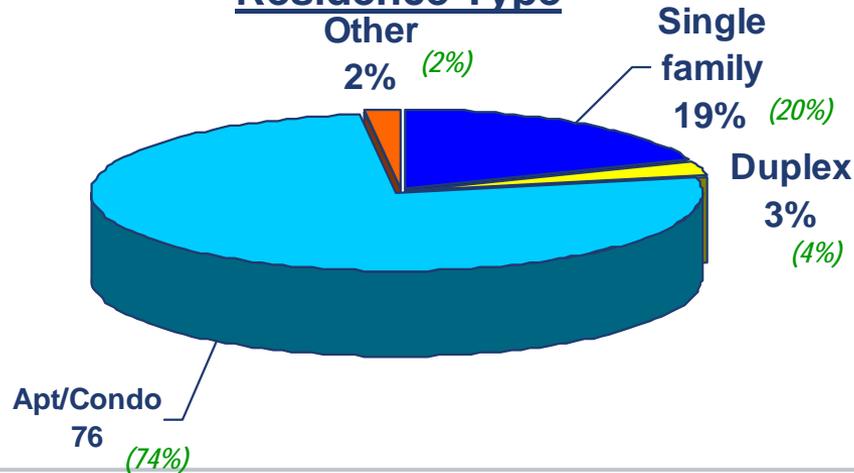
Gender



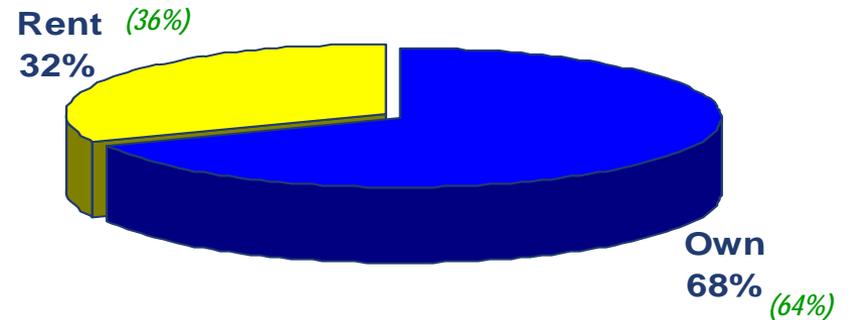
Ethnicity



Residence Type



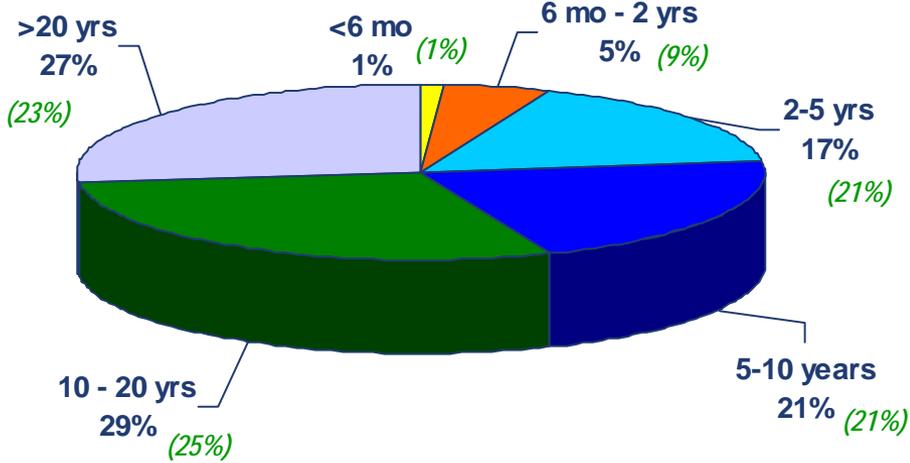
Own or Rent



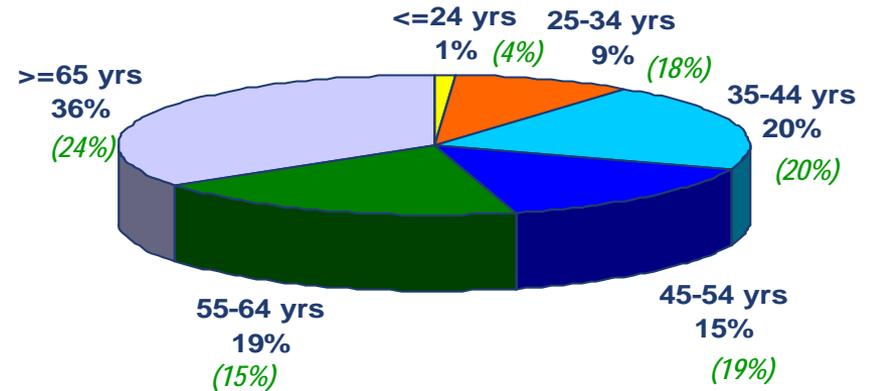
Respondent Profile: Resident Survey (cont'd)

2005 percentage

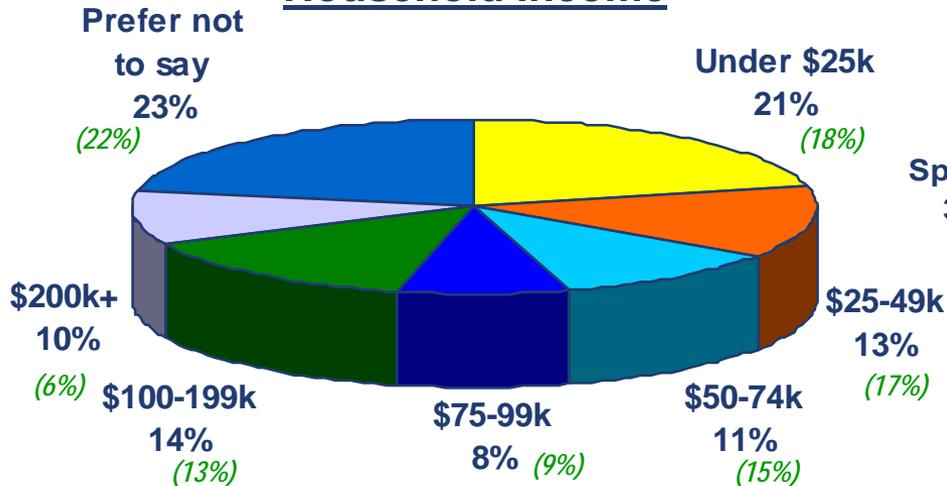
Tenure in City



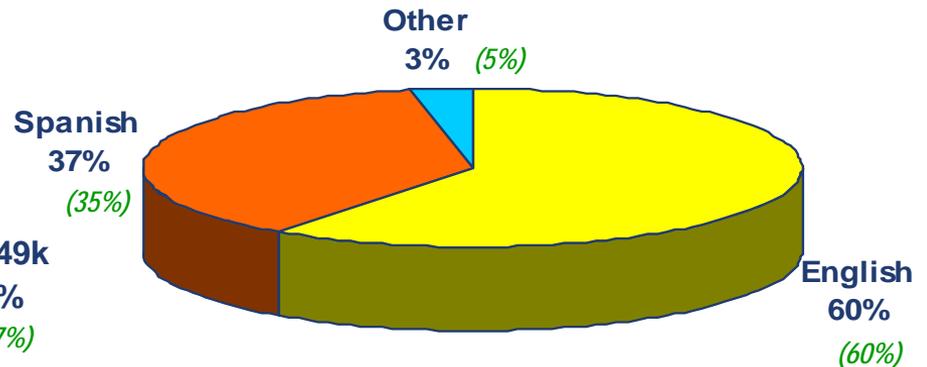
Age



Household Income



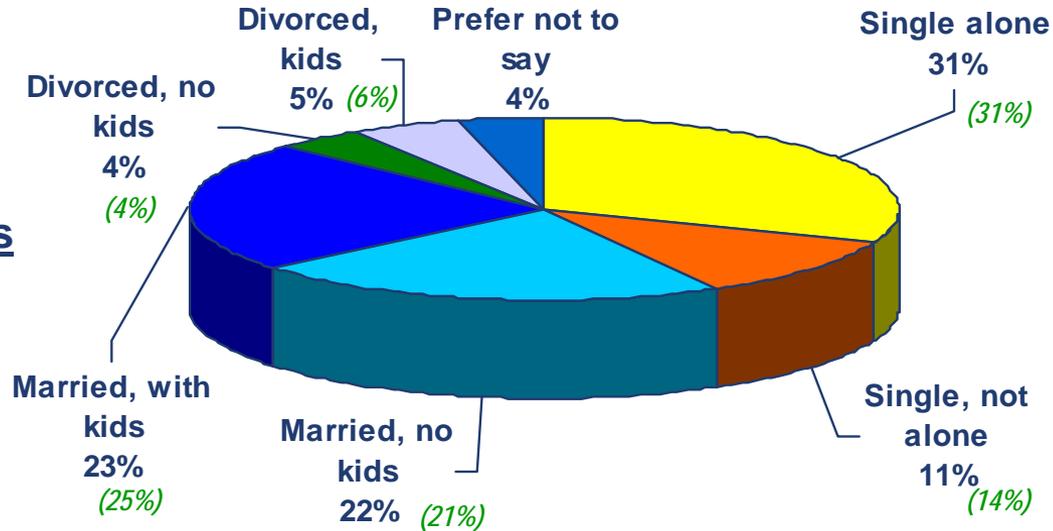
Language



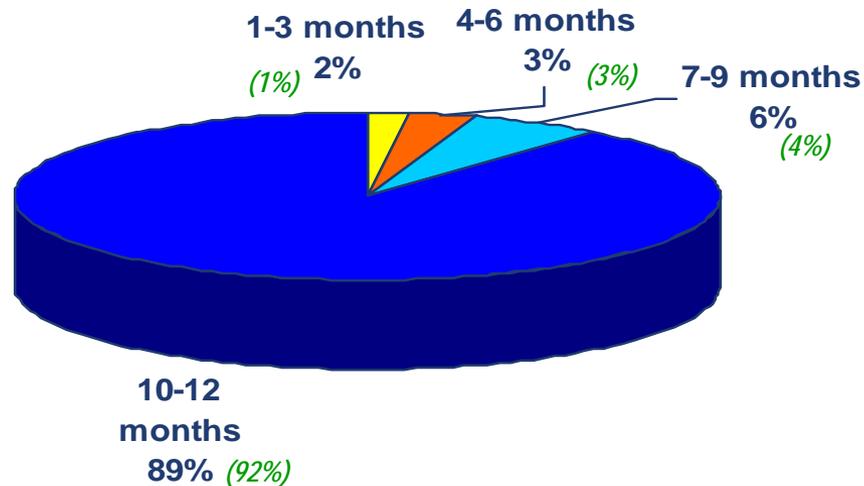
Respondent Profile: Resident Survey (cont'd)

2005 percentage

Marital Status



Months a year in City



Reliability of the Data: Business Survey

- Response rate improved over 2005
 - Hay Group received **513** completes out of 4,731
 - In 2005, 466 responses out of 5,395
 - Participation Rate = 11%
 - 8% in 2005
- Responses provide for a confidence estimate of 95%, +/- 4%
 - Business data weighted to reflect number of businesses in each region
 - Reliability by region +/- 7%

Respondent Profile: Business Survey

<u>Type of Business</u>	<u>NB</u>	<u>MB</u>	<u>SB</u>	TOTAL
Professional				
a) Medical	3	22	9	34
b) Finance/Insurance/ Real Estate	14	21	39	74
c) Other Professional*	23	38	68	129
d) Entertainment**	7	5	18	30
Retail/Personal Services	40	34	102	176
Restaurants/Bars	10	5	34	49
Hotels	4	3	14	21
TOTAL	101	128	284	513
# in Spanish	6	2	7	15

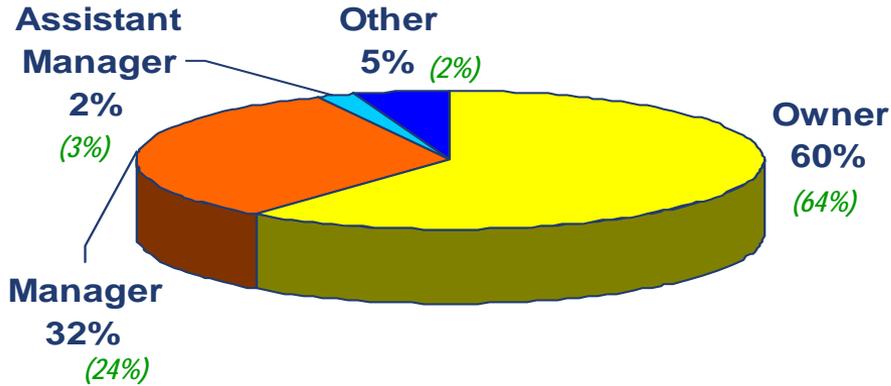
* Marketing/Advertising, Legal, Home-Based Businesses

** Production Companies, Theaters/Museums

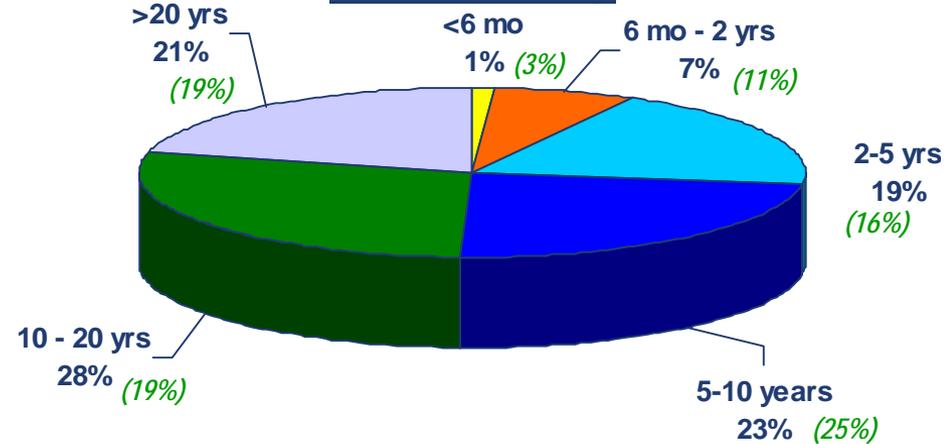
Respondent Profile: Business Survey (cont'd)

2005 percentage

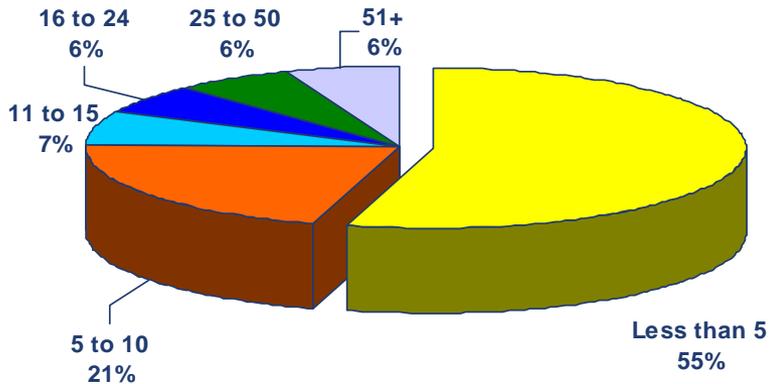
Position



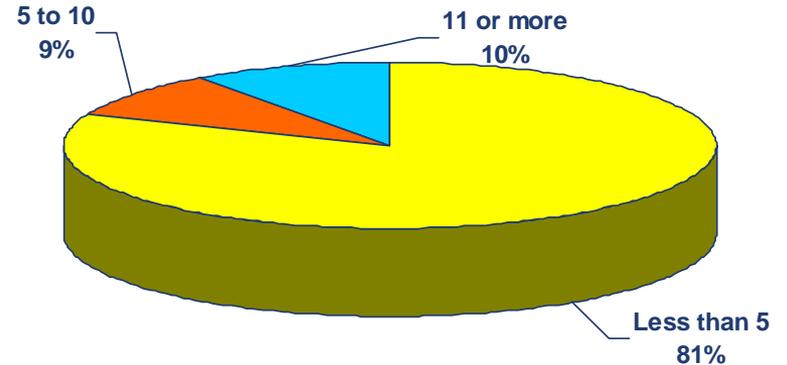
Tenure in City



Number of Full-Time

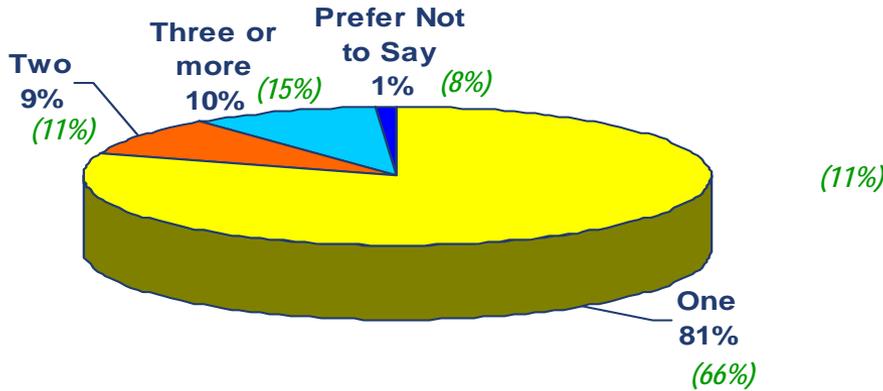


Number of Part-Time

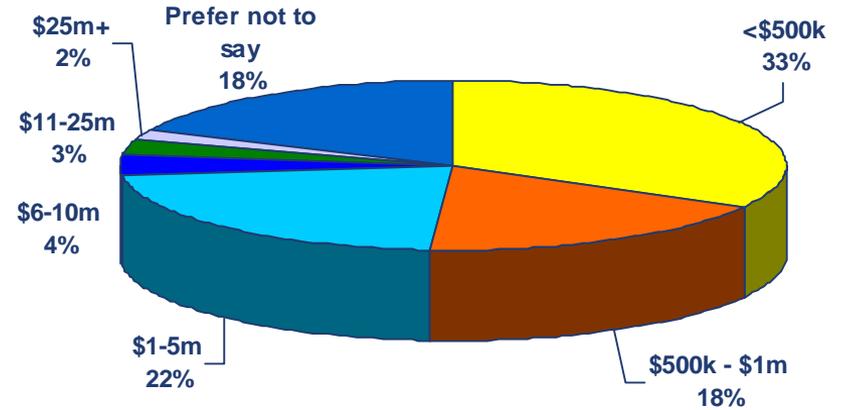


Respondent Profile: Business Survey (cont'd)

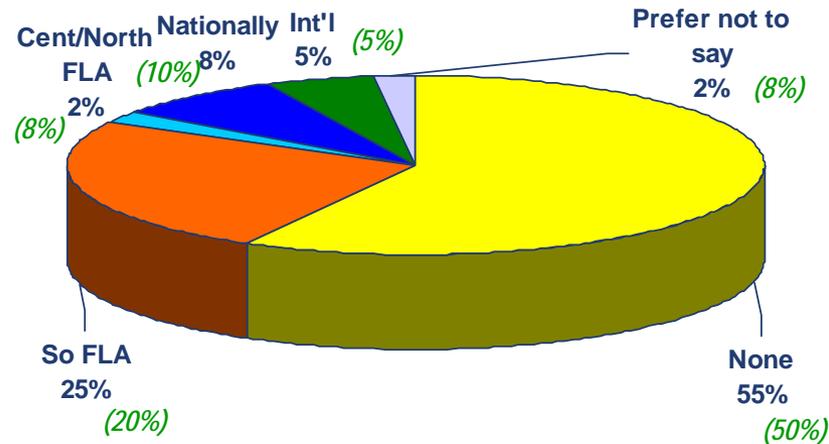
Number of Locations



Annual Sales



Other locations



Data Analysis Methods

Absolute

1. **Level of Response:** % Distribution for each “valid” response category
 - Note: “Don’t Know” not included in valid response calculation

Comparative

2. **Internal Benchmarking:** Between Groups (e.g., across regions, demographics)
3. **By Issue:** Comparison of Categories or Questions (e.g., City Services vs. Customer Service, etc.)
4. **Vs. Expectations:** Level of response vs. your expectations (e.g., assumptions of community perceptions vs. their actual perceptions)
5. **Vs. Trend:** Comparing 2007 results with 2005 survey results
6. **External Benchmarking*:** Citizen normative database comparison to over 400 jurisdictions and “customized” norms

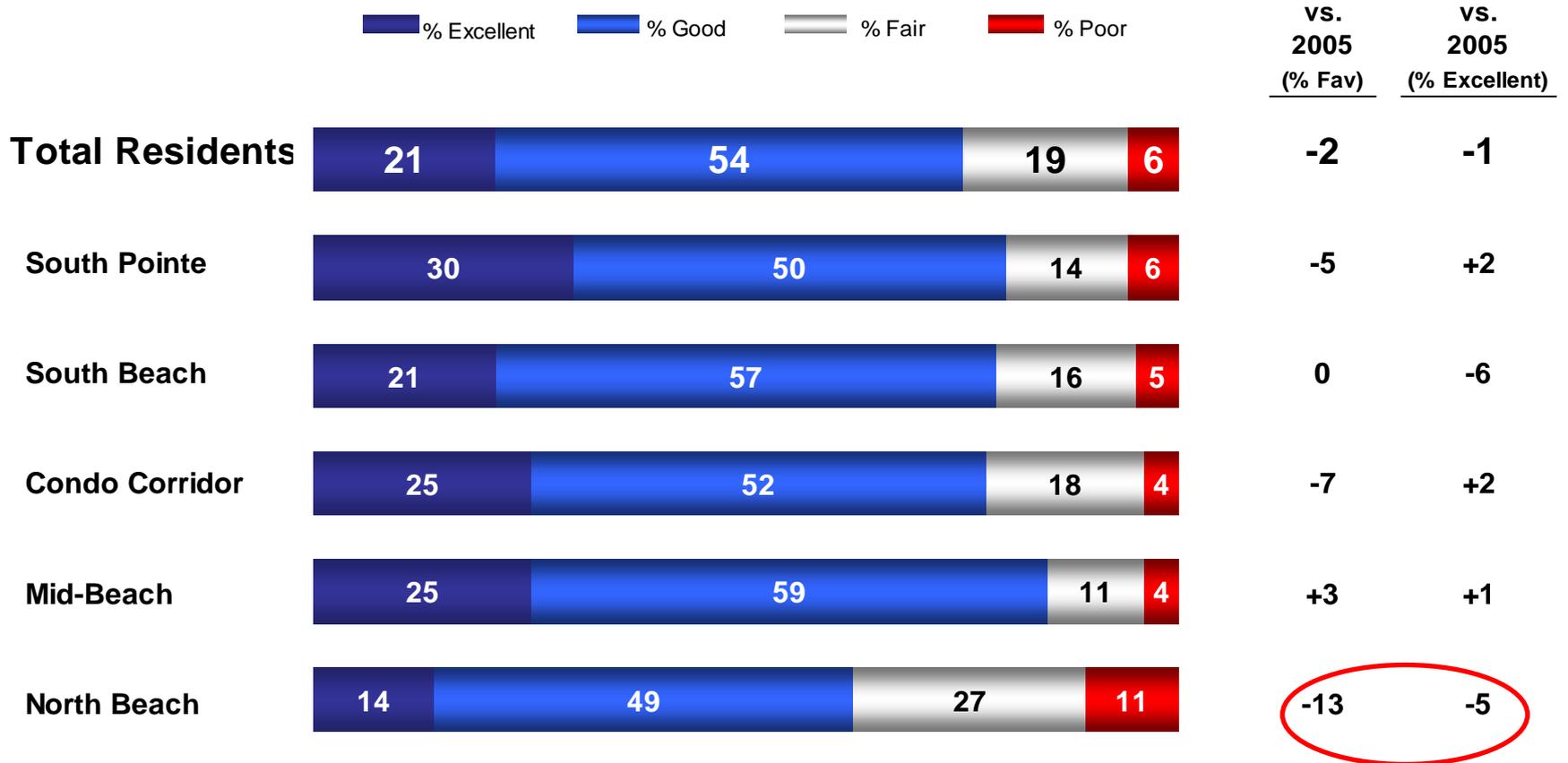
We will look at all six

**Comparative citizen opinions came from the National Research Center, Inc. database of citizen survey results*

***Results by Survey Category –
Overall Quality of Life***

Quality of Life for Residents

Overall, how would you rate the quality of life within the City of Miami Beach?



Quality of Life in Miami Beach – Resident Normative Comparison*

Question	City of Miami Beach Rating	Rank	Number of Jurisdictions	Miami Beach Percentile	Comparison to Norm	Vs. 2005 Comparison to Norm
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Similar Cities

Quality of Life	63	3	11	82%	Above norm	NA
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Florida Only

Quality of Life	63	8	19	63%	Above norm	NA
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Population bet. 70,000 to 100,000 Norms

Quality of Life	63	16	26	42%	Similar to norm	NA
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All Jurisdictions

Quality of Life	63	129	221	42%	Similar to norm	NA
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*Comparative citizen opinions came from the National Research Center, Inc. database of citizen survey results

Quality of Life for Residents – What’s Important

What one area is the most important to you regarding quality of life in the City of Miami Beach?

Blue = Positive in 2007 results

Red = Area for improvement in 2007 results

<u>Mentioned Most Often</u>	<u>NB</u>	<u>MB</u>	<u>CC</u>	<u>SB</u>	<u>SP</u>
1) Safety across the City > Preventing crime, drugs, gangs, speeding cars/mopeds > Areas mentioned: Lincoln, Washington, Collins, 41st – 71 st , 65 th – 85 th	1	1	1	1	1
2) Traffic (general congestion)	2	2	4	2	2
3) Cleanliness (streets, sewers, etc.)	3	4	3	3	4
4) Impact of Construction > Overdevelopment, number of high-rises, traffic	5	3	5	4	5
5) Beaches (maintenance, erosion)	4	5	2	5	3

Other areas mentioned:

- Cost of Living / Taxes / Rising Rents: Mid Beach, North Beach
- Road maintenance repair: Condo Corridor, Mid Beach
- Parks and recreation: North Beach, South Beach
- Availability of public transportation: North Beach, South Beach, South Pointe

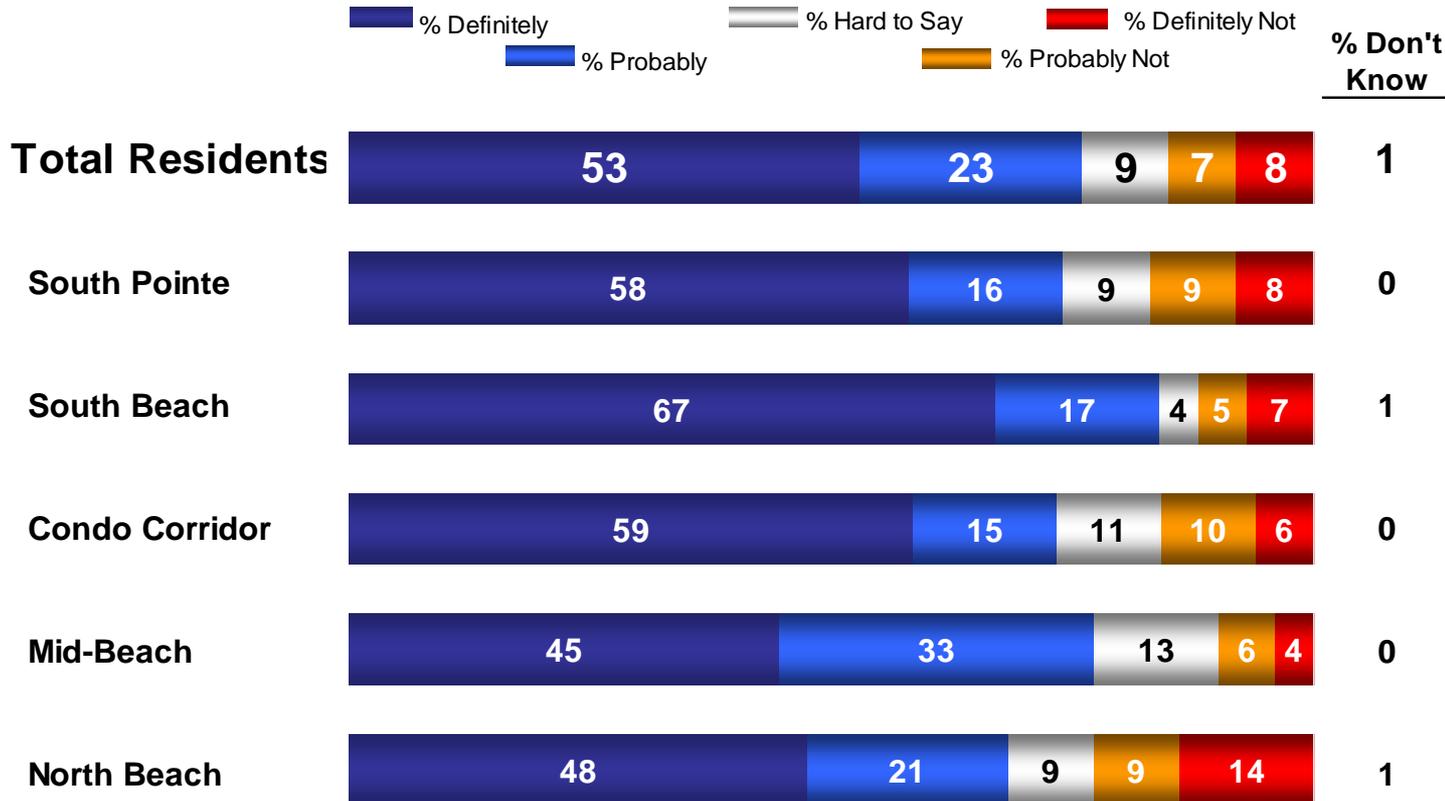
Miami Beach as a Place to Live for Residents

How would you rate the City of Miami Beach as a place to live?



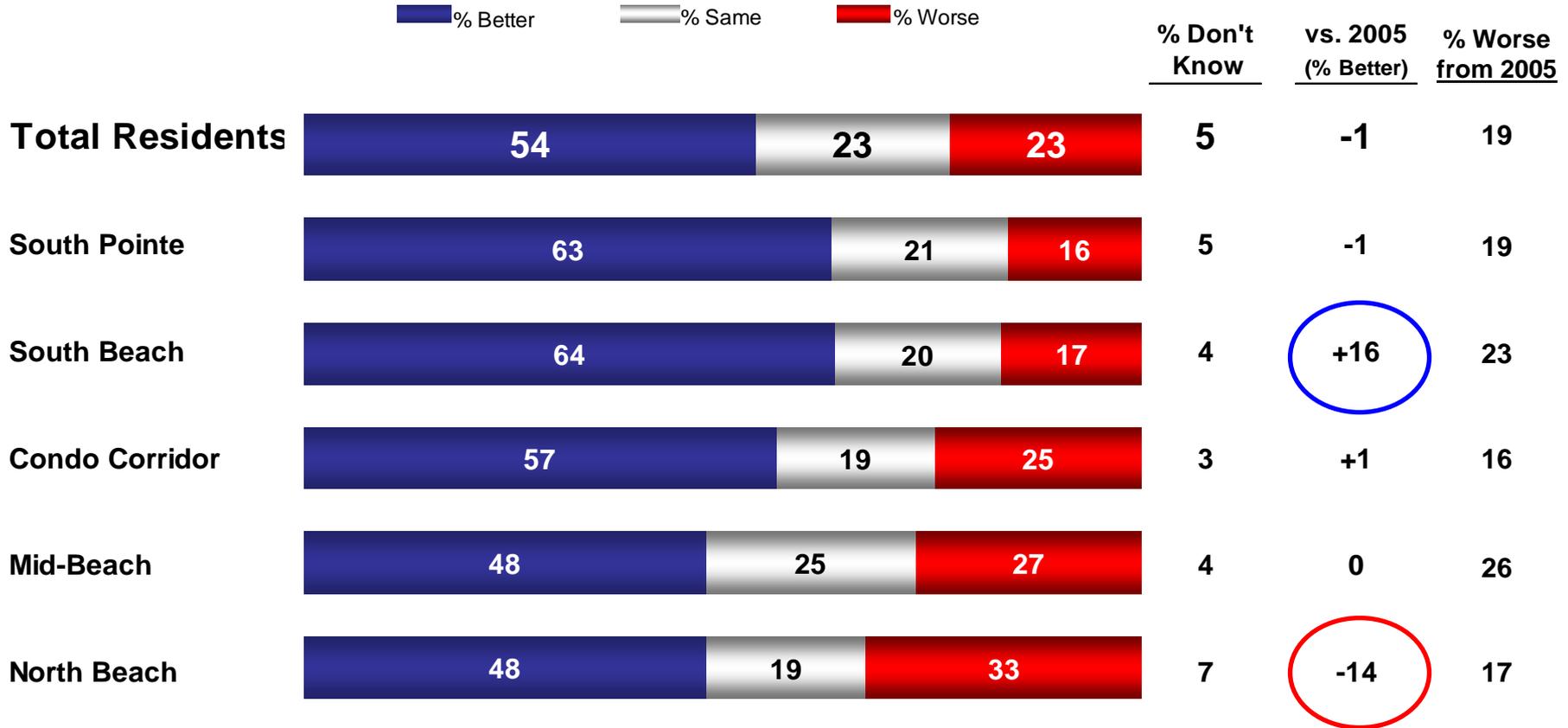
Recommend Miami Beach to Others – Residents

Would you recommend the City of Miami Beach to family and friends as a place to live?



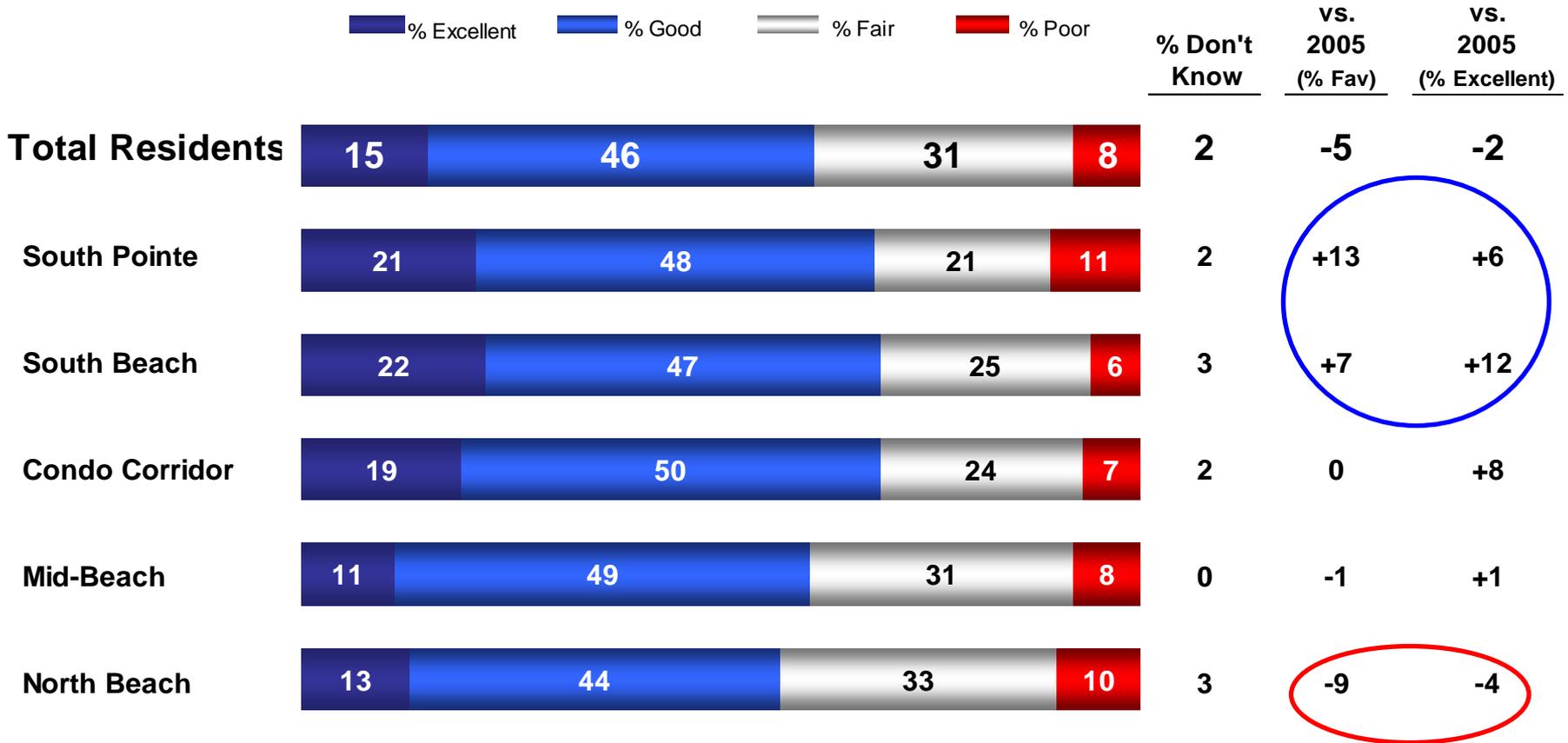
Perceived Change Over Time – Residents

As a place to live, the City of Miami Beach is better, about the same, or worse now than a few years ago?



Government Meeting the Needs of Residents

In general, how good a job do you feel Miami Beach City government is doing in meeting your needs and/or the needs of your family?



Government Meeting the Needs of Residents – Resident Normative Comparison*

Similar Cities

Question	City of Miami Beach Rating	Rank	Number of Jurisdictions	Miami Beach Percentile	Comparison to Norm	Vs. 2005 Comparison to Norm
City as a place to live	70	4	19	84%	Above norm	No change
City government meeting needs	56	1	10	100%	Above norm	No change

Florida Only

City as a place to live	70	6	26	81%	Above norm	No change
City government meeting needs	56	2	10	90%	Above norm	No change

*Comparative citizen opinions came from the National Research Center, Inc. database of citizen survey results

Government Meeting the Needs of Residents – Resident Normative Comparison*

Population bet. 70,000 to 100,000 Norms

Question	City of Miami Beach Rating	Rank	Number of Jurisdictions	Miami Beach Percentile	Comparison to Norm	Vs. 2005 Comparison to Norm
City as a place to live	70	11	30	67%	Above norm	No change
City government meeting needs	56	2	10	90%	Above norm	No change

All Jurisdictions

City as a place to live	70	6	26	81%	Above norm	No change
City government meeting needs	56	15	69	80%	Above norm	No change

*Comparative citizen opinions came from the National Research Center, Inc. database of citizen survey results

Reason Located Business in Miami Beach

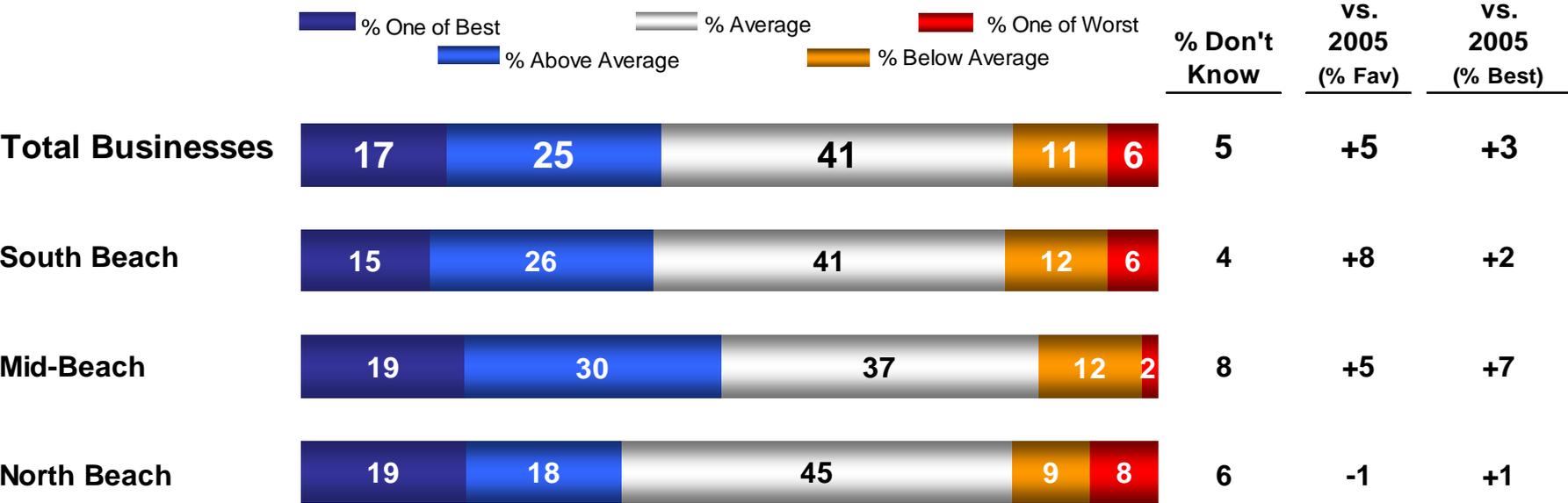
**What was the major reason you located your business in the City of Miami Beach?
[BUSINESSES]**

<u>Option</u>	<u>% TOTAL</u>	<u>% NB</u>	<u>% MB</u>	<u>% SB</u>
1) Already a resident	36	42	46	30
2) Climate/Location	18	17	19	18
3) Proximity to Customers	15	13	14	17
4) Economy	6	5	3	7
5) City's Image	5	3	0	7
6) Availability of Properties	2	5	1	2
7) Nightlife/Entertainment Options	1	0	1	1
Other*	18	16	16	19

** Most commonly mentioned included Corporate/Head Office decision to open a business in Miami Beach, tourism industry, too much competition elsewhere*

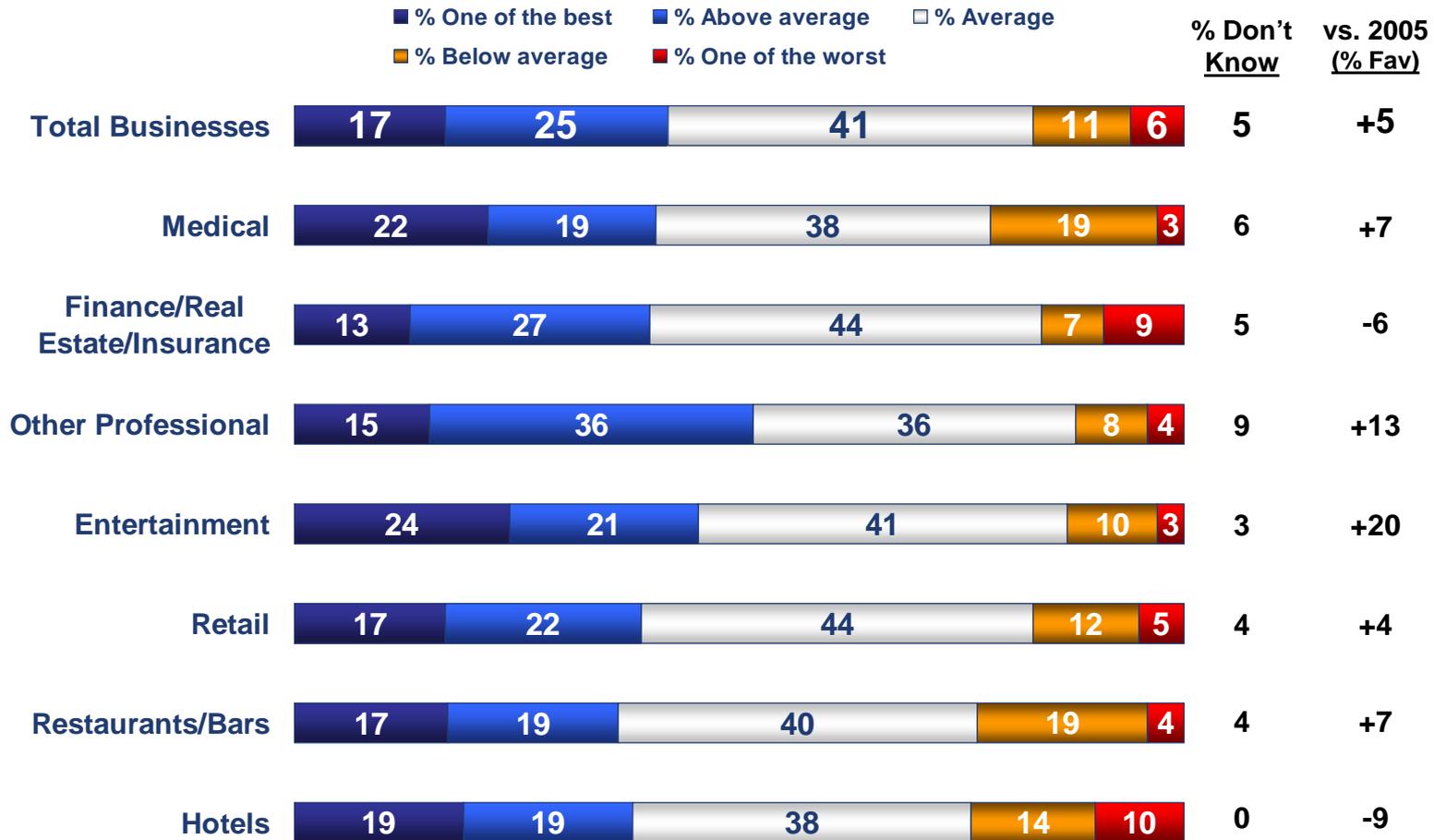
Miami Beach as a Place to Run a Business

Compared to other cities you know about, how would you rate Miami Beach as a place to run a business?



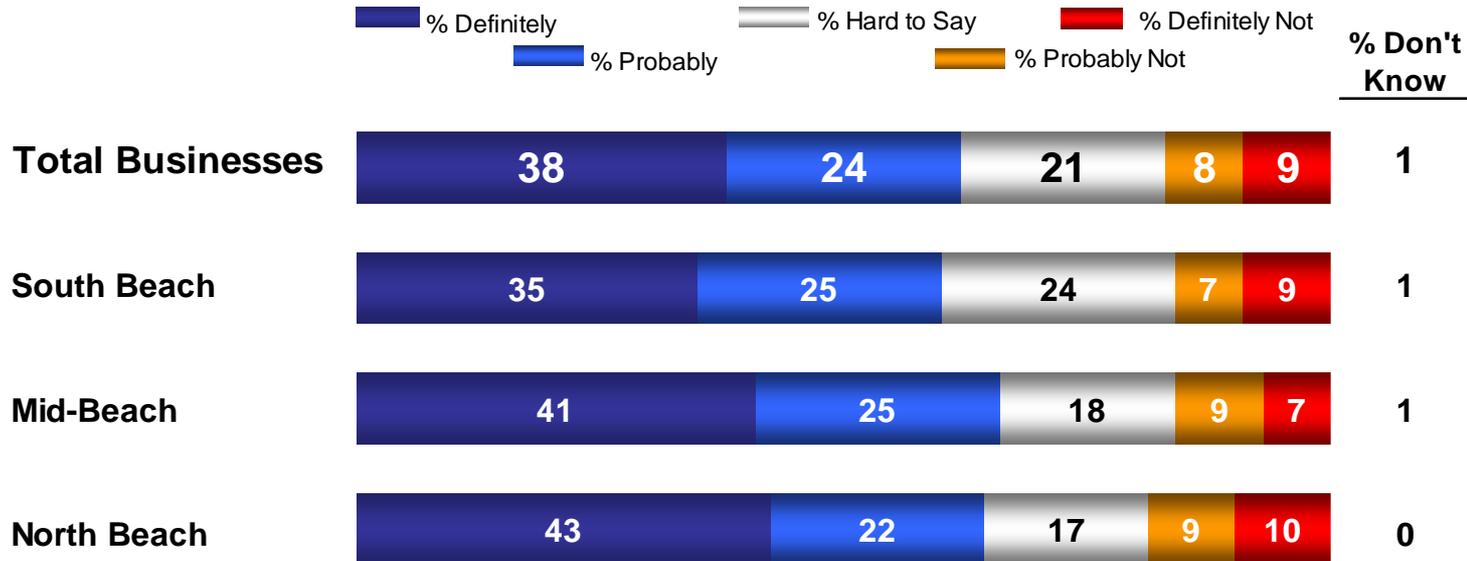
Miami Beach as a Place to Run a Business – By Business Type

How would you rate Miami Beach as a place to run a business?



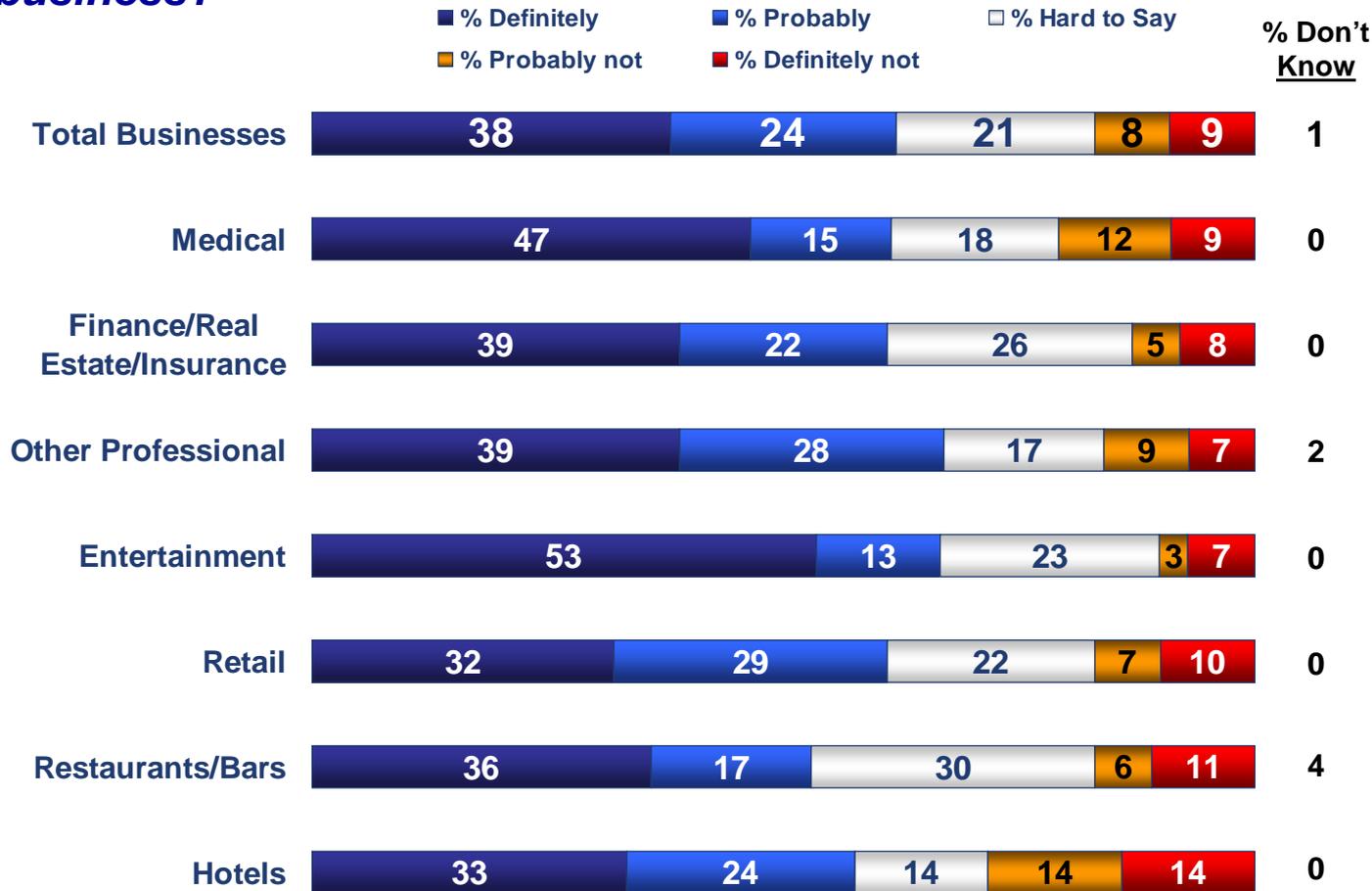
Recommend Miami Beach to Others – Businesses

Would you recommend the City of Miami Beach to others as a place to run a business?



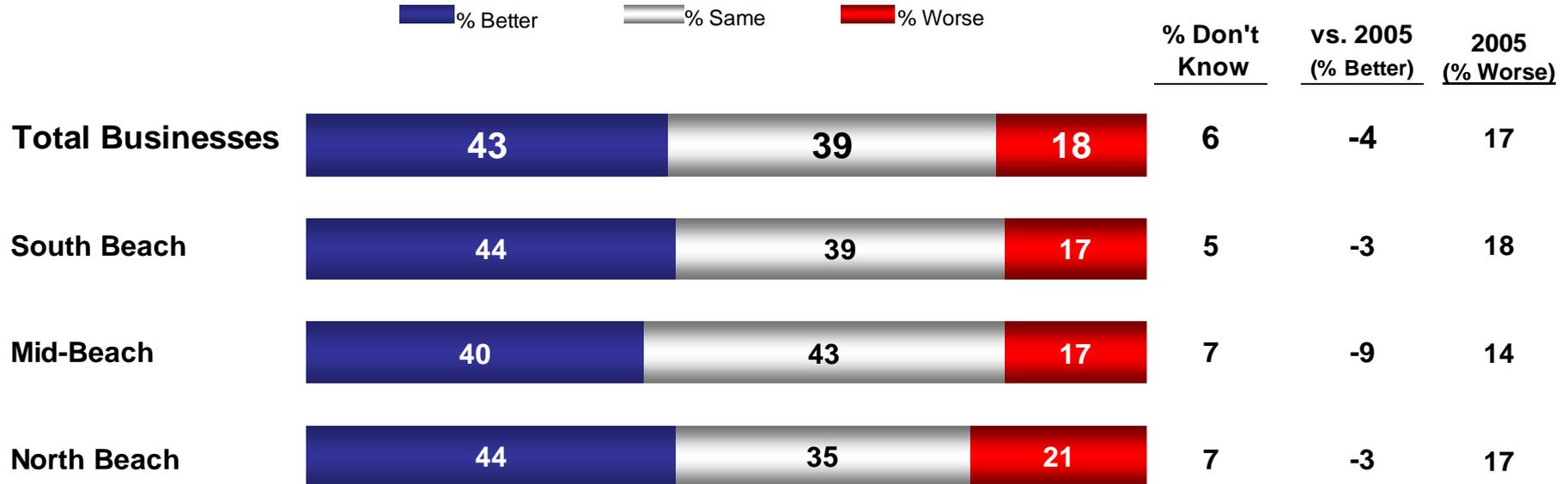
Recommend Miami Beach to Others – By Business Type

Would you recommend the City of Miami Beach to others as a place to run a business?



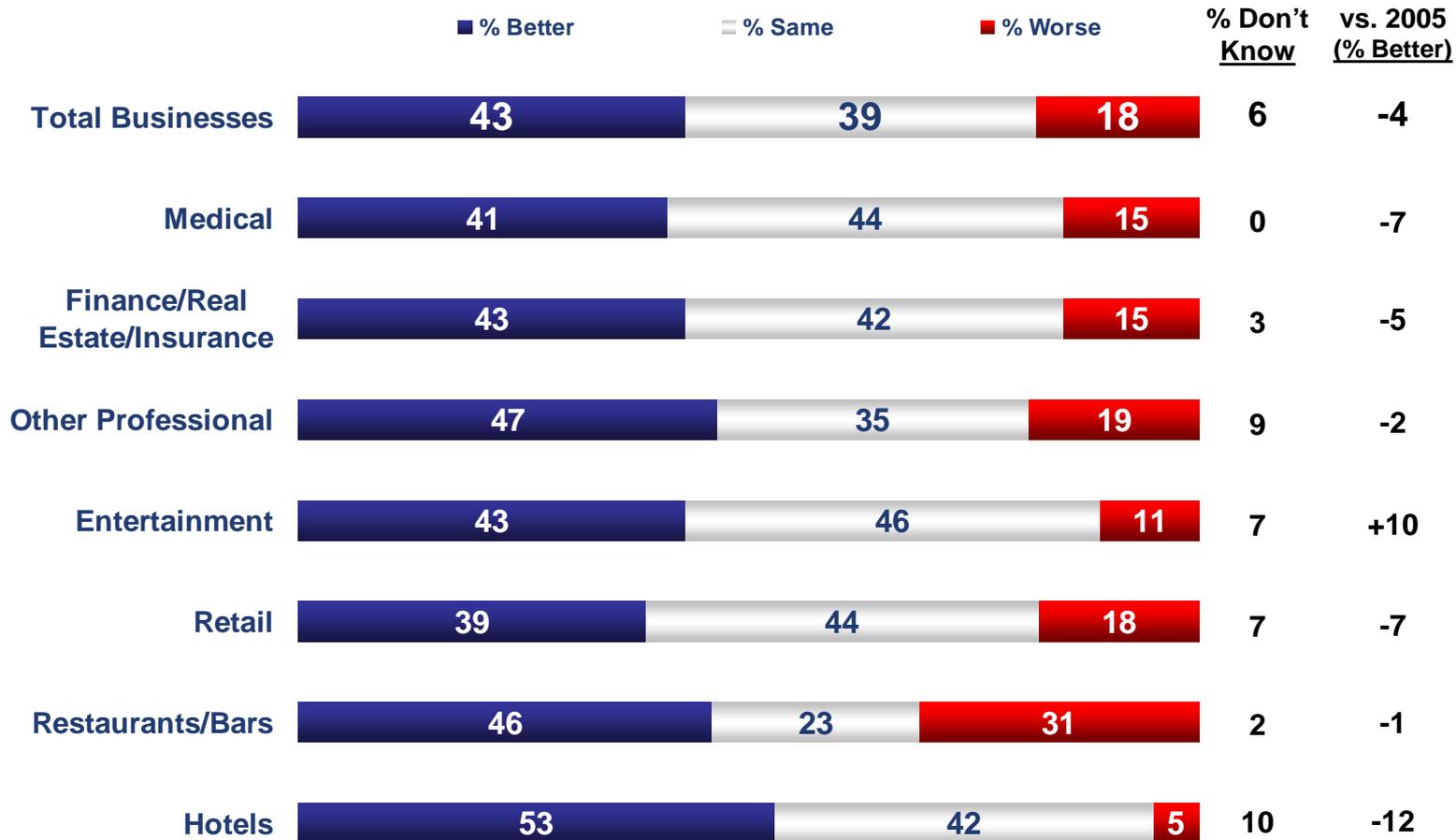
Perceived Change Over Time – Businesses

As a place to do business, the City of Miami Beach is better, about the same, or worse now than a few years ago?



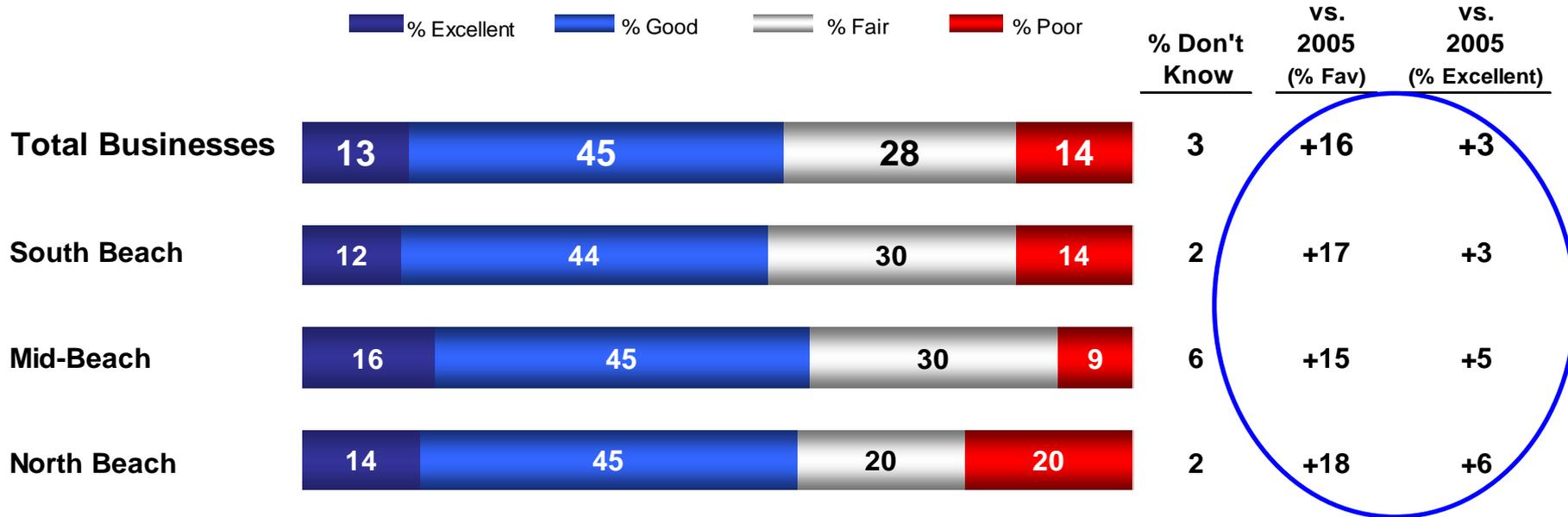
Perceived Change Over Time – By Business Type

As a place to run a business, the City of Miami Beach is better, about the same, or worse now than a few years ago?



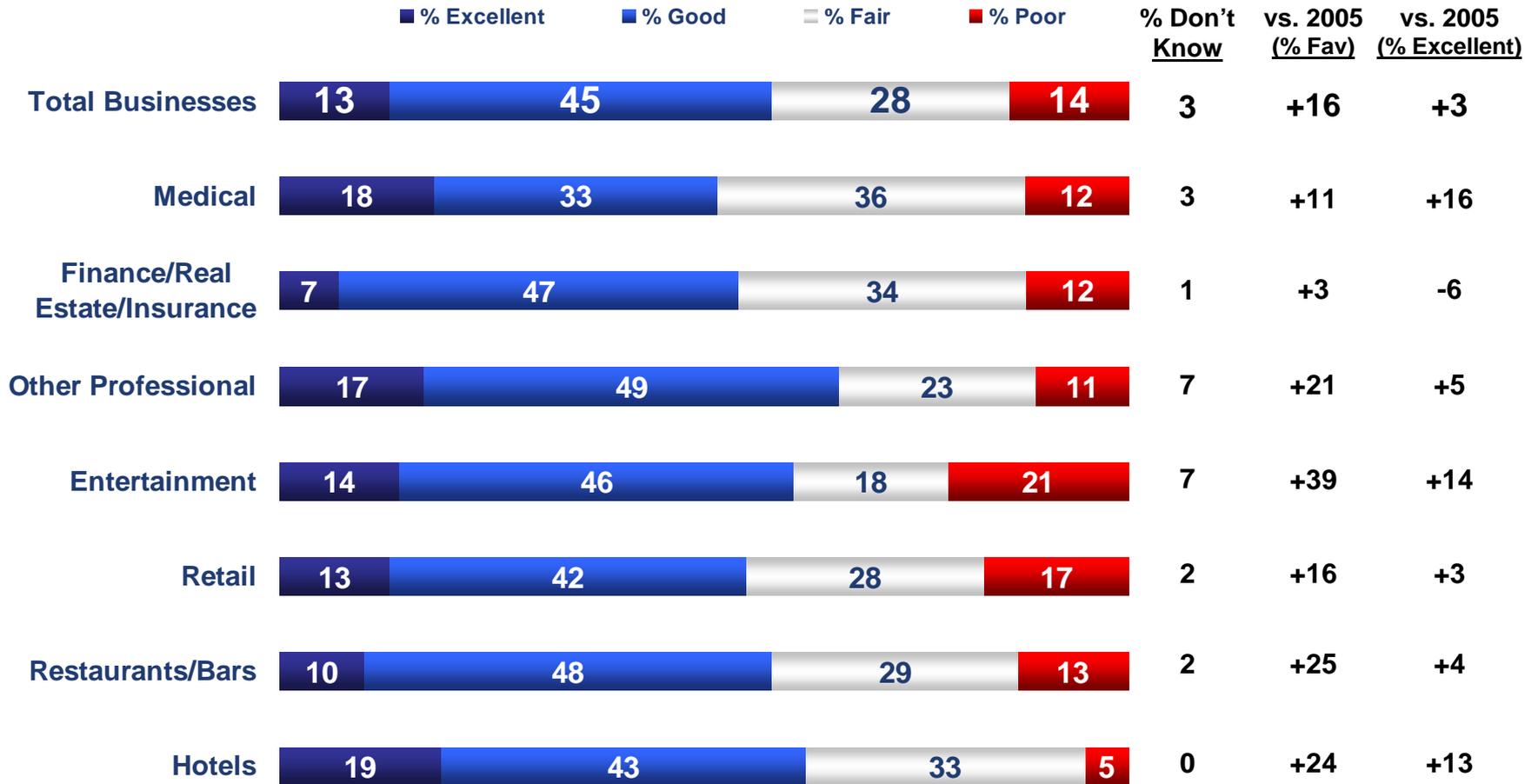
Government Meeting the Needs of Businesses

In general, how good a job do you feel Miami Beach City government is doing in meeting the needs of your business?



Government Meeting the Needs of Businesses – By Business Type

In general, how good a job do you feel Miami Beach City government is doing in meeting the needs of your business?



Overall Quality of Life – In Sum

- Overall, while there has been some fluctuation in ratings since 2005, satisfaction living in the City remains very positive for residents
 - 75% of residents in the sample rate quality of life in the City as either ‘Excellent’ or ‘Good’ – this item is similar or, more often, above all normative comparisons
 - Moreover, 83% say that Miami Beach is either an ‘Excellent’ or ‘Good’ place to live and 54% feel it’s getting better
 - 76% would recommend Miami Beach as a place to live to their family or friends
 - Still favorable (61%) that City government is doing a good job in meeting residents’ needs – again consistently above norm
- The most significant finding is by region
 - South Beach and South Pointe residents see the City as a better place to live now than they did in 2005 and are more positive than residents in other regions on rating of City government meeting their needs
 - Mid-Beach and Condo Corridor residents also slightly more positive this year (most notably in their ‘Excellent’ ratings)
 - Residents in North Beach are the least positive overall and results declined significantly across all ‘quality of life’ questions since 2005
- Safety remains the primary ‘top of mind’ issue for residents in every region with Traffic coming in second
 - Residents in Condo Corridor and South Pointe more often mentioned quality of beaches as an area of importance for them, as compared to residents in other regions

Overall Quality of Life – In Sum (cont'd)

- Businesses ratings, on the whole, are up quite a bit from 2005
- Similar to 2005, 'Already an existing resident', the 'Climate' and 'Proximity to customers' were cited as the main reasons businesses chose Miami Beach
- 42% of businesses say that Miami Beach is "One of the Best" or an "Above Average" place to run a business (vs. 37% in 2005) and 43% feel the City is improving as a place to run their business
 - Businesses in North Beach not as positive about Miami Beach as a place to run a business
- Nearly 2/3 (62%) would recommend Miami Beach to others as a place to run a business
- More good news: 58% of businesses in 2007 say that City government is meeting their needs (up 16% from 2005!)
 - Results on this item improved across all regions and business types

***Results by Survey Category –
City Services***

City Services

% Excellent
 % Good
 % Fair
 % Poor

% Don't Know vs. 2005 (% Fav) vs. 2005 (% Excellent)

Cleanliness of streets in business/commercial areas

	% Excellent	% Good	% Fair	% Poor	% Don't Know	vs. 2005 (% Fav)	vs. 2005 (% Excellent)
Residents	14	47	29	11	2	-2	-4
Businesses	15	37	29	19	0	+3	+3

Cleanliness of canals/waterways

	% Excellent	% Good	% Fair	% Poor	% Don't Know	vs. 2005 (% Fav)	vs. 2005 (% Excellent)
Residents	9	45	29	17	16	+5	-2
Businesses	11	40	31	18	18	+2	+2

Garbage/trash collection

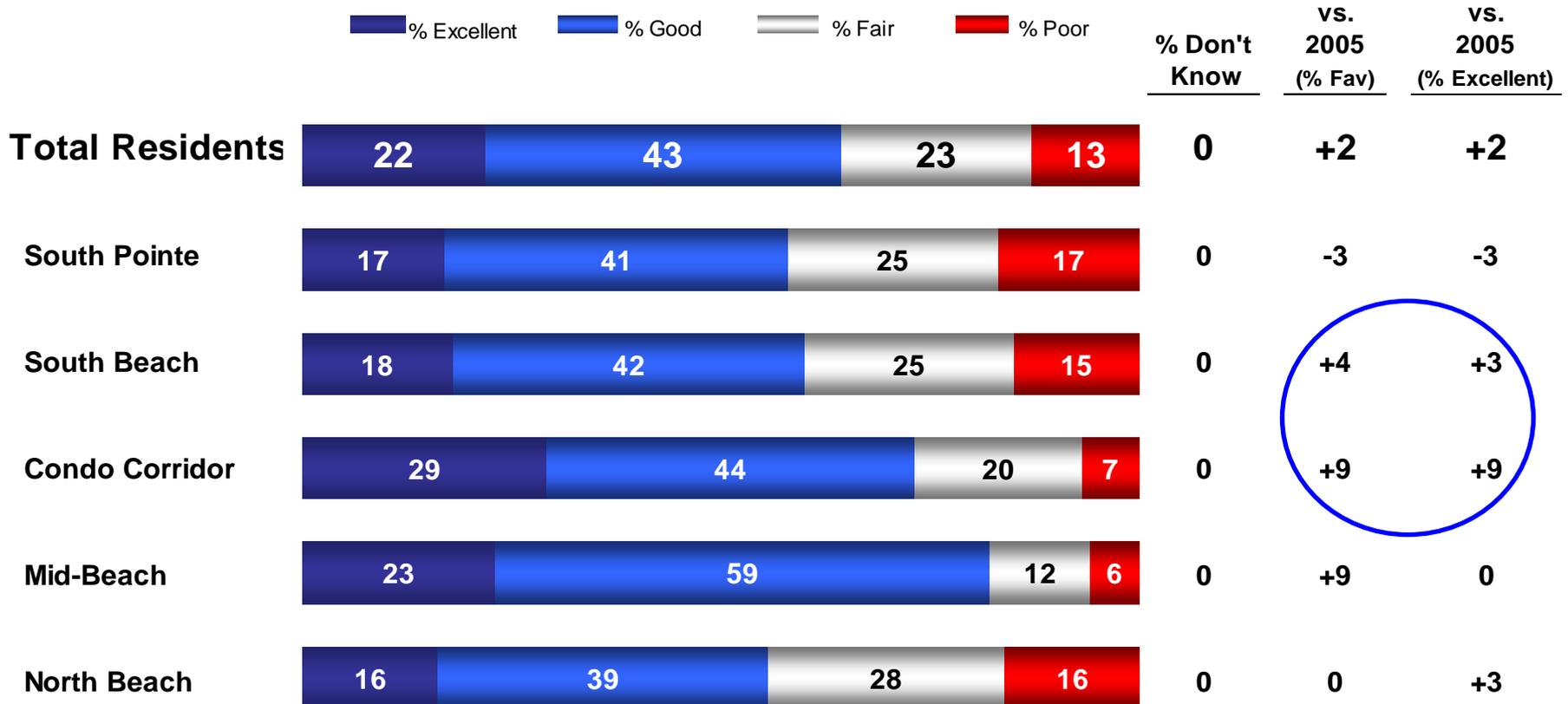
	% Excellent	% Good	% Fair	% Poor	% Don't Know	vs. 2005 (% Fav)	vs. 2005 (% Excellent)
Residents	20	56	17	7	7	-4	-6
Businesses	18	50	18	13	6	+10	+6

Storm drainage (to avoid flooding)

	% Excellent	% Good	% Fair	% Poor	% Don't Know	vs. 2005 (% Fav)	vs. 2005 (% Excellent)
Residents	6	36	32	26	5	-3	-5
Businesses	7	30	24	39	3	-1	+1

City Services (cont'd) – Streets

Cleanliness of streets in your neighborhood



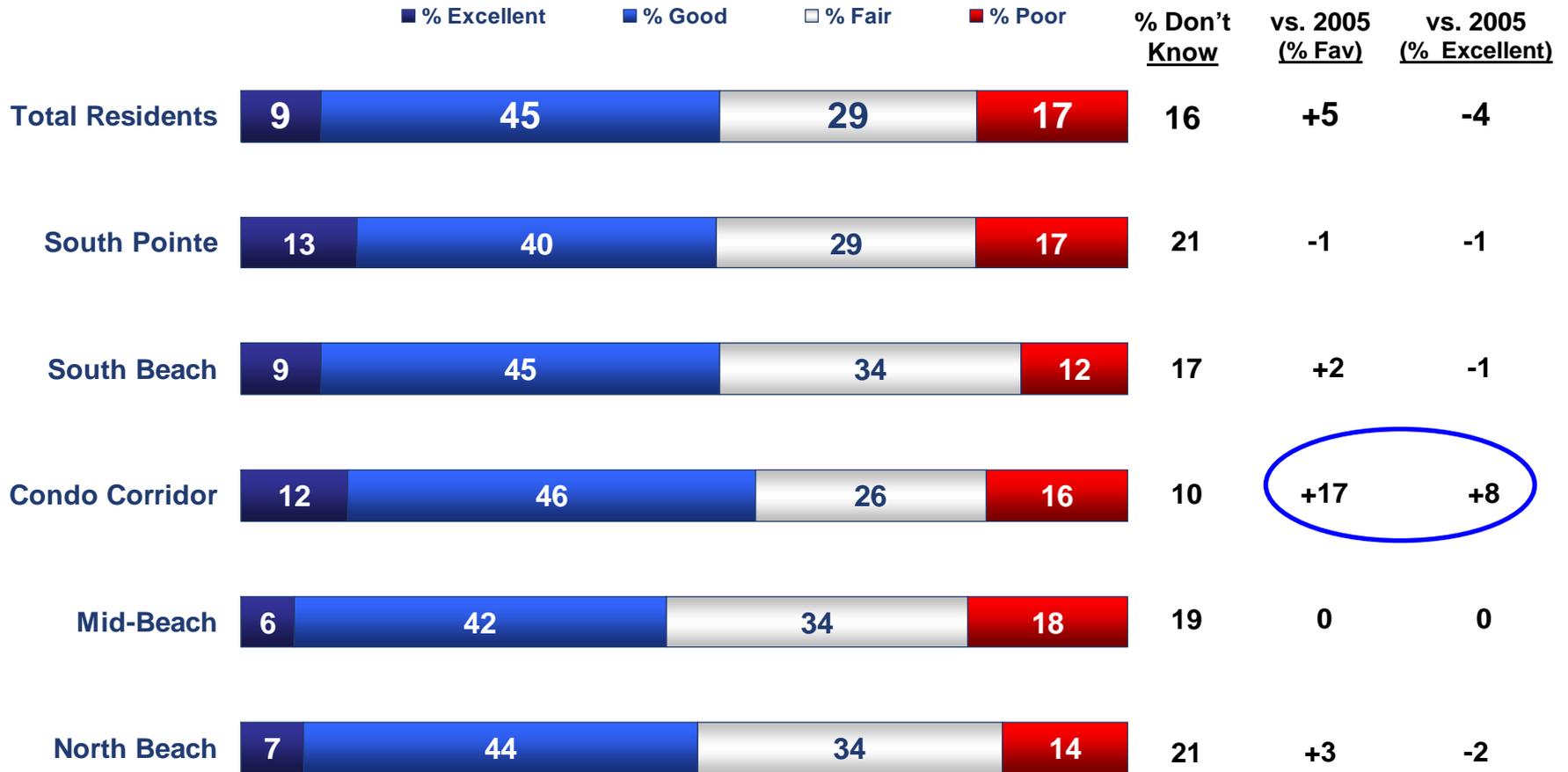
City Services (cont'd) – Streets

Cleanliness of streets in business/commercial areas



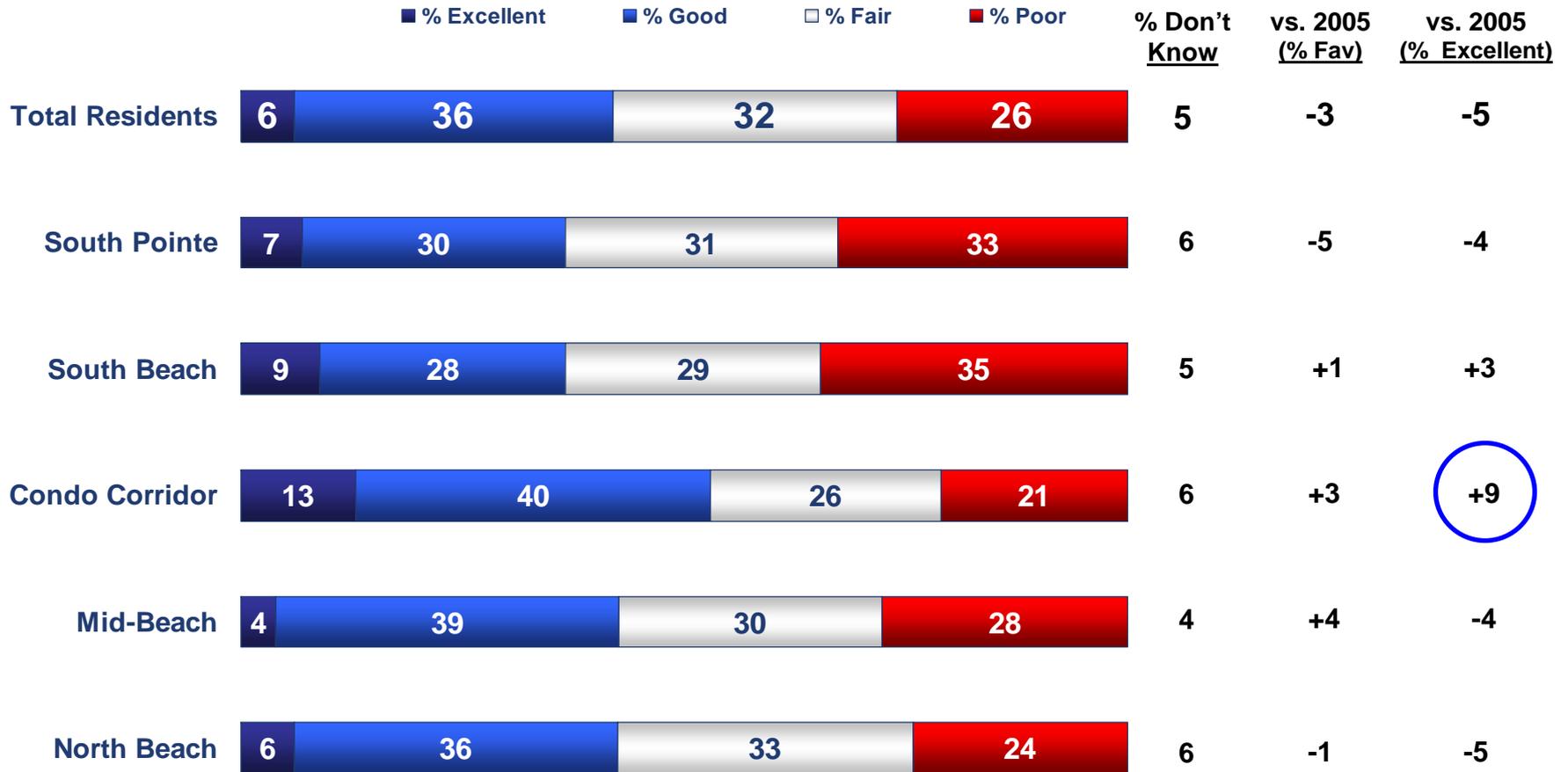
City Services (cont'd) – Streets

Cleanliness of canals/waterways



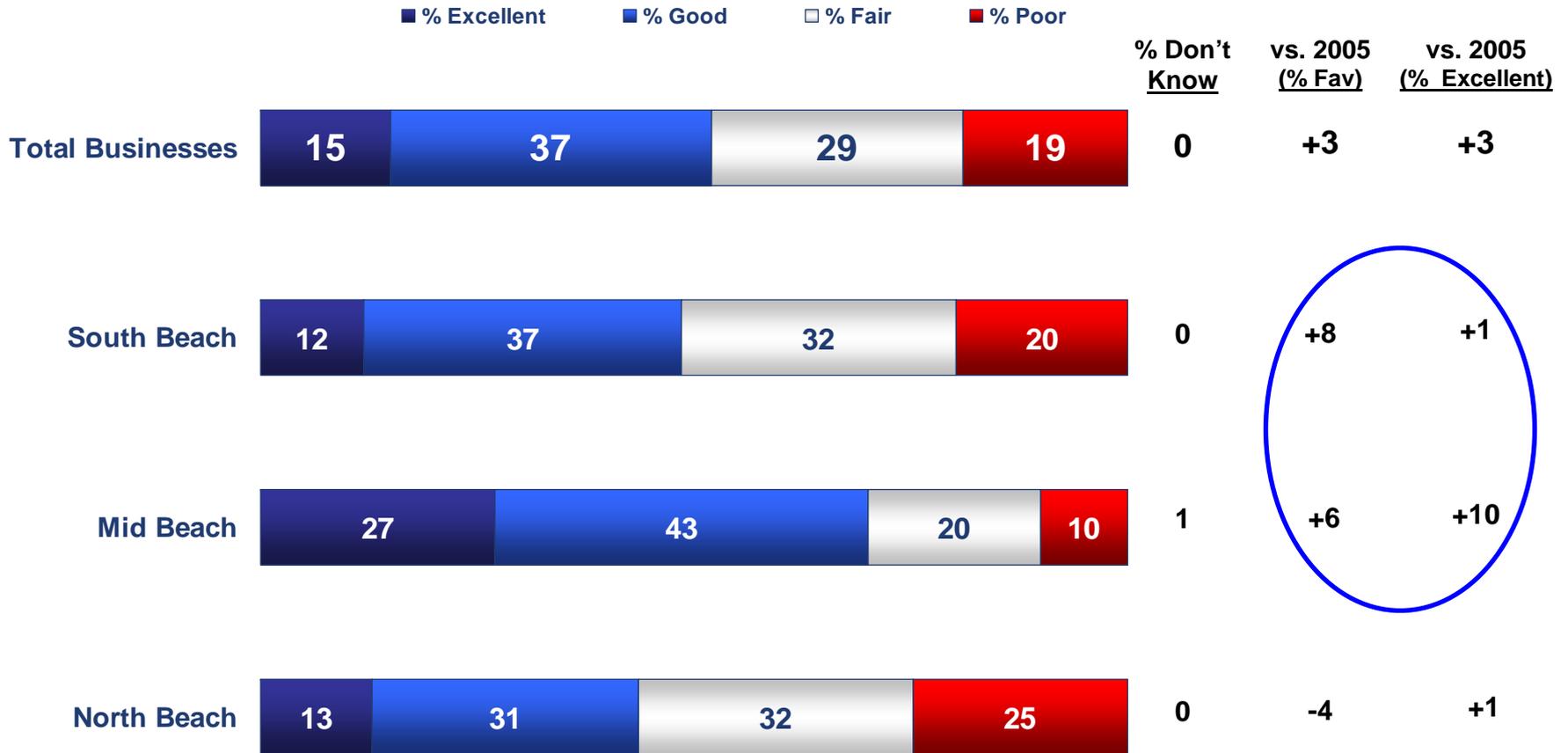
City Services (cont'd) – Streets

Storm drainage



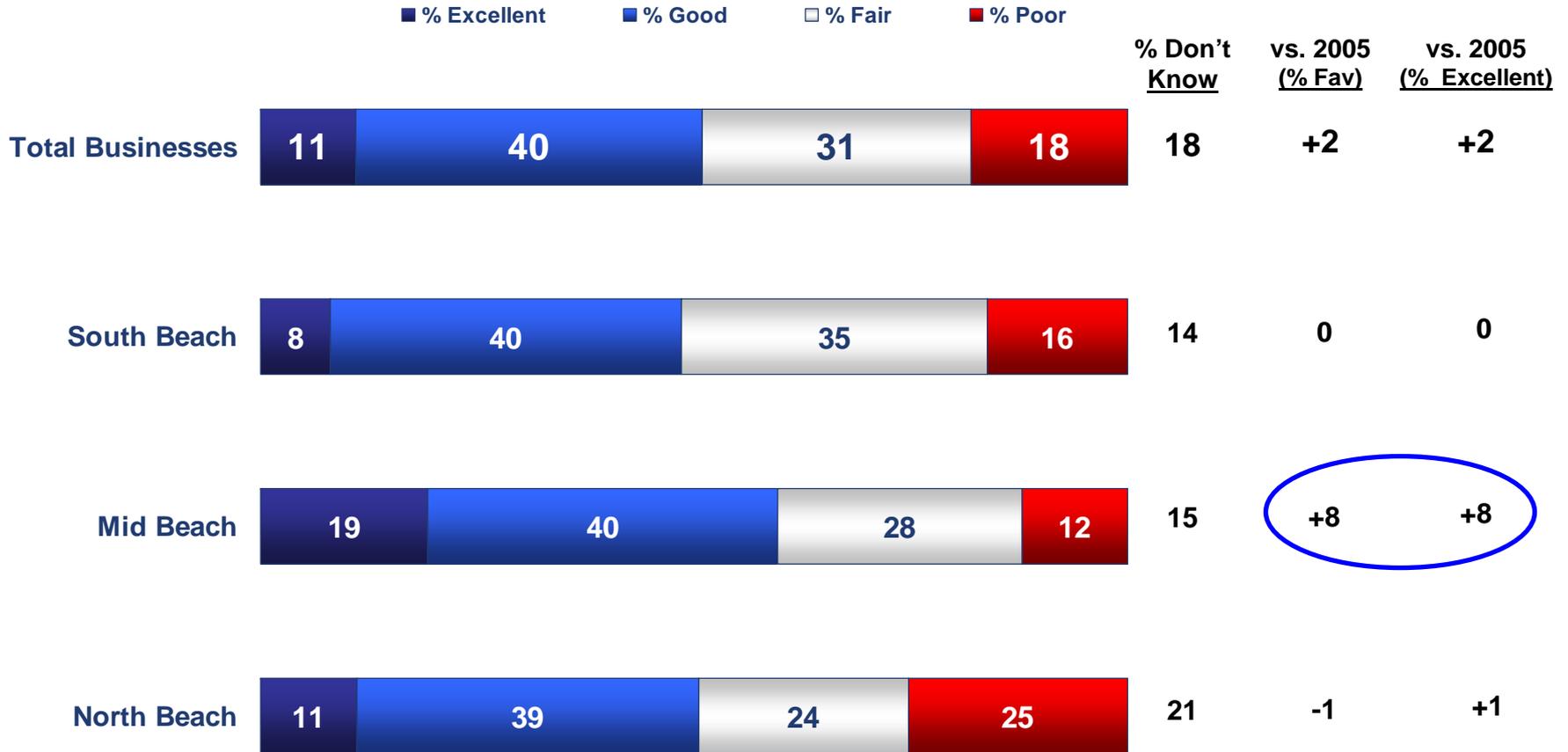
City Services (cont'd) – Streets

Cleanliness of streets in business/commercial areas



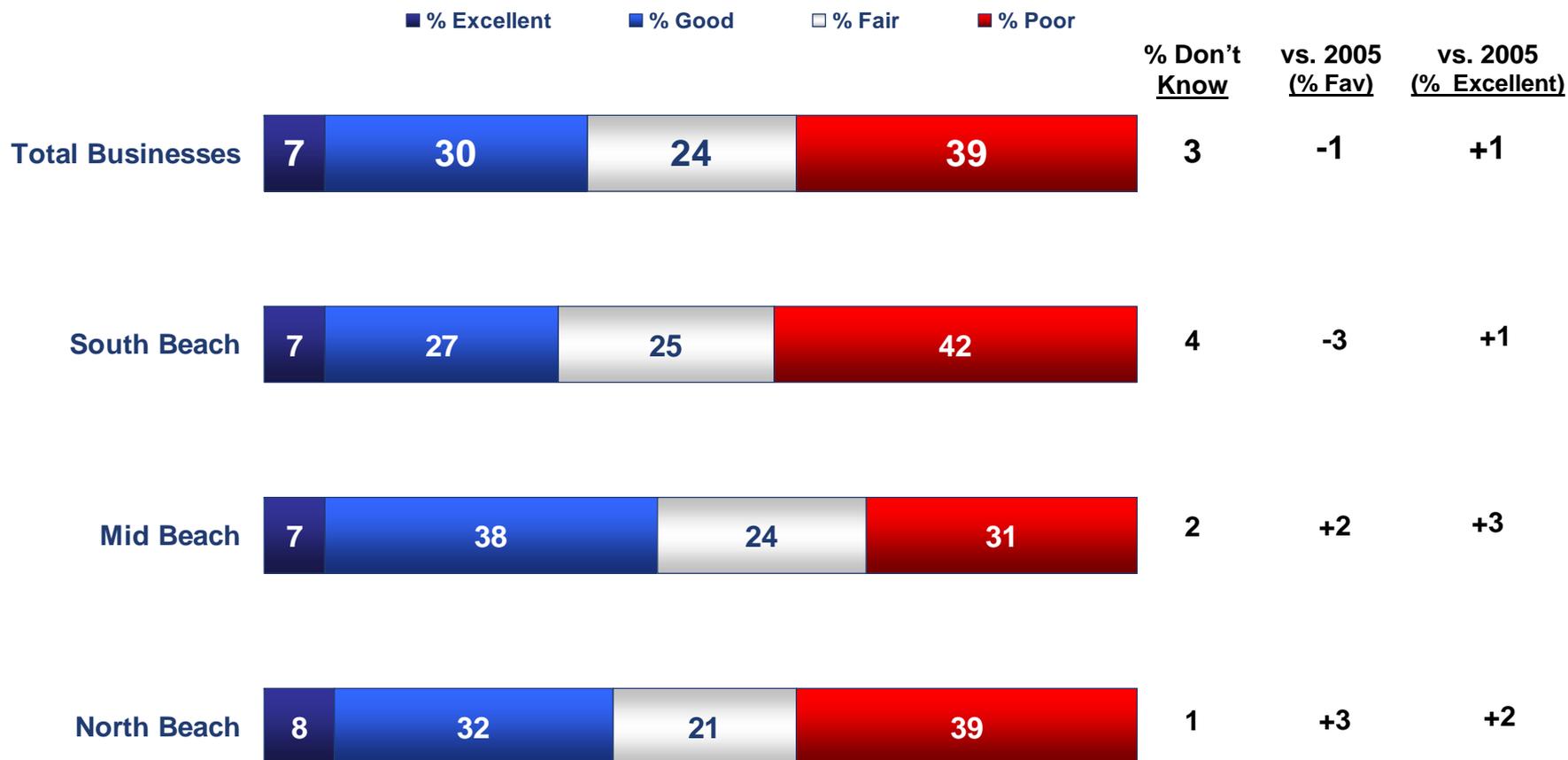
City Services (cont'd) – Streets

Cleanliness of canals/waterways

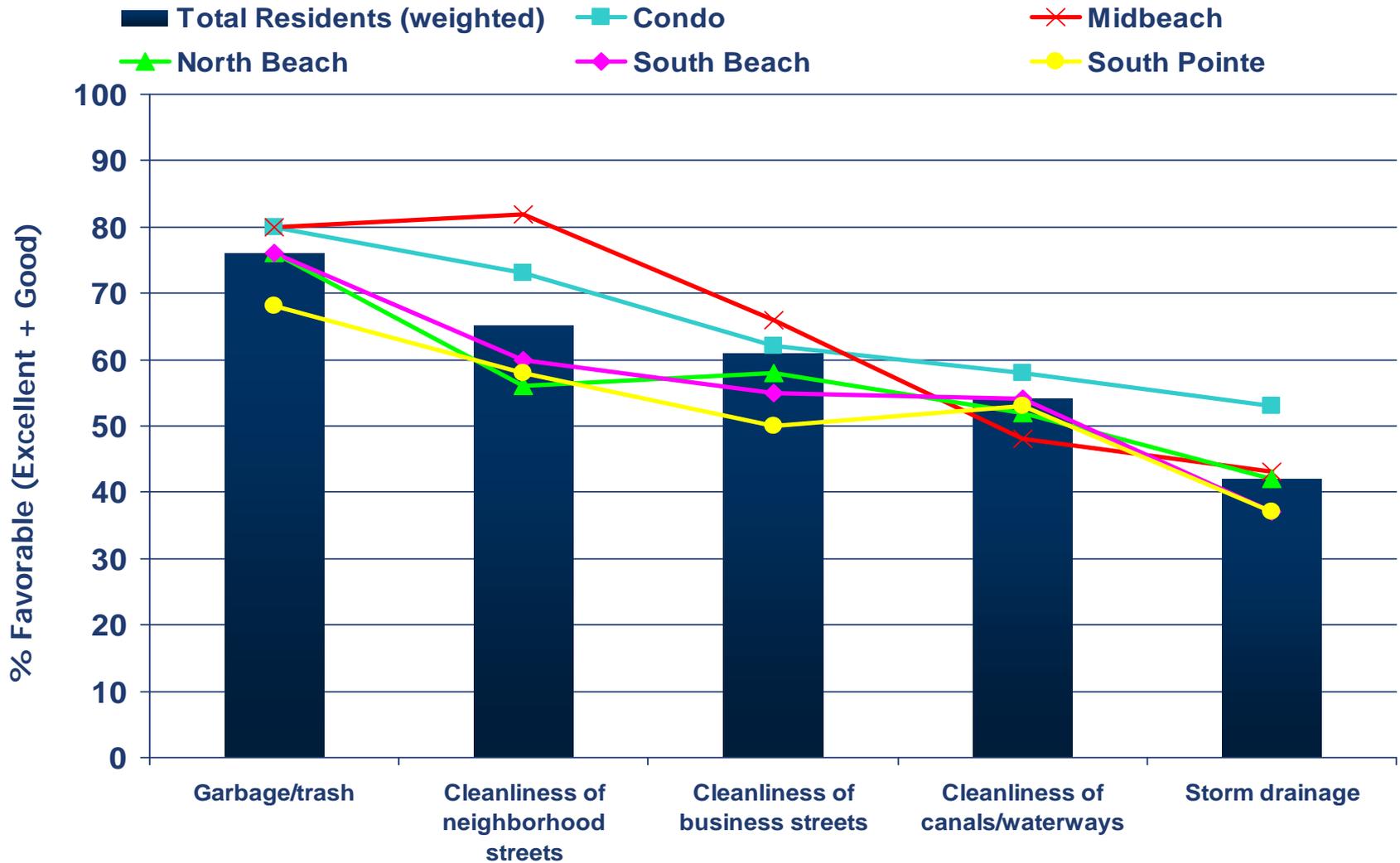


City Services (cont'd) – Streets

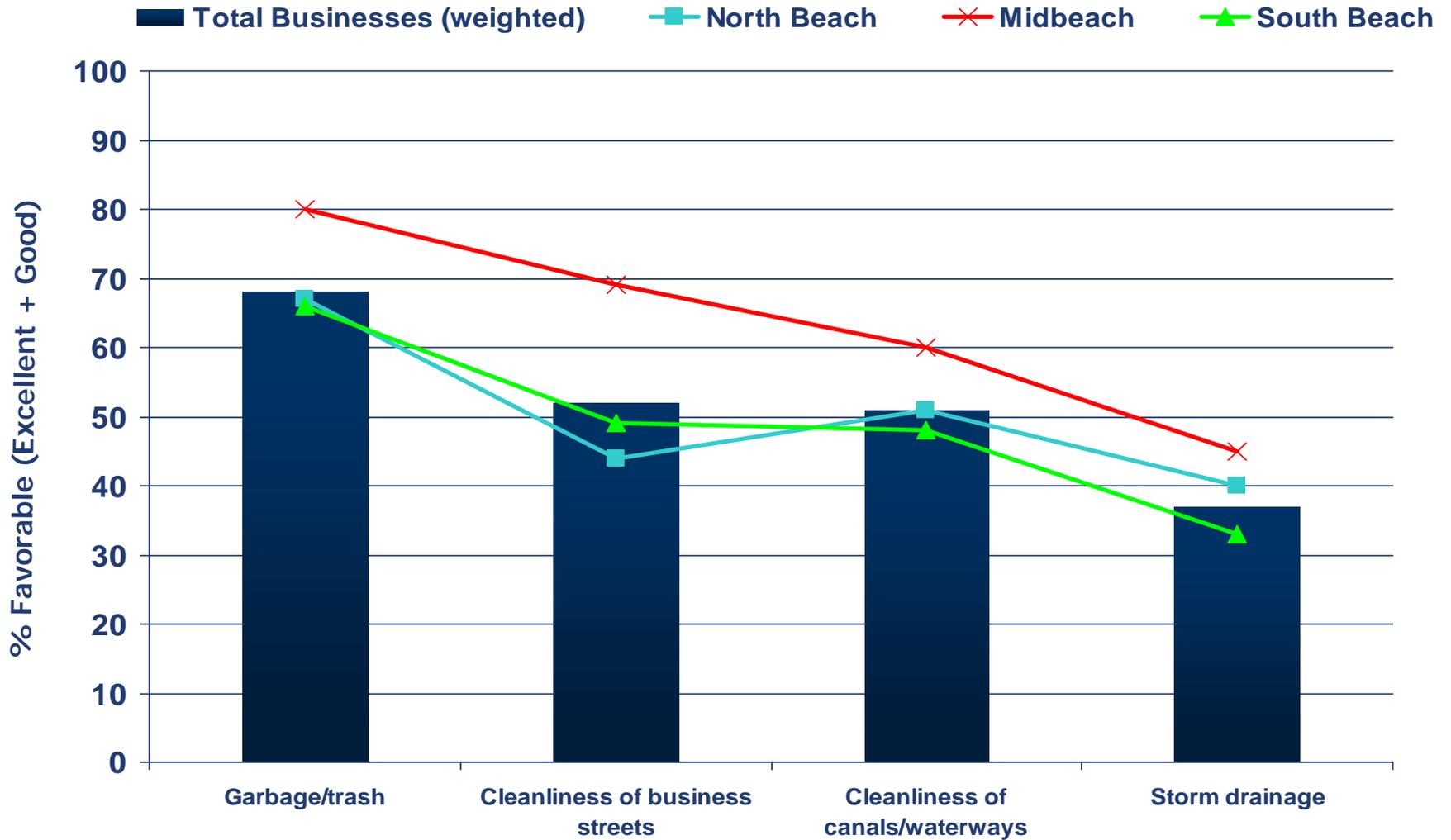
Storm drainage



City Services (cont'd) – Residents by Region



City Services (cont'd) – Businesses by Region



City Services (cont'd) – Businesses by Region

Which do you feel is the most important factor impacting cleanliness surrounding your business? [BUSINESSES]

<u>Option</u>	<u>%</u> <u>TOTAL</u>	<u>%</u> <u>NB</u>	<u>%</u> <u>MB</u>	<u>%</u> <u>SB</u>
1) Litter/Trash	40	40	32	40
2) Debris from construction sites	17	29	19	13
3) Alleyways	15	10	12	17
4) Trees, branches, leaves	10	9	17	6
5) Fecal Matter	6	6	3	7
Other*	12	9	8	14
Don't know	5	4	9	3

* Most commonly mentioned included the homeless, waste water in sewers/potholes

City Services (cont'd)

% Excellent
 % Good
 % Fair
 % Poor

% Don't Know vs. 2005 (% Fav) vs. 2005 (% Excellent)

Condition of sidewalks (that is, few or no cracks)

Residents	8	41	33	18	1	-4	-5
Businesses	12	42	27	19	2	+6	+2

Appearance and maintenance of the City's public buildings

Residents	17	64	15	4	3	+1	-6
Businesses	20	57	19	5	3	+4	+1

Landscape maintenance in rights of way and public areas

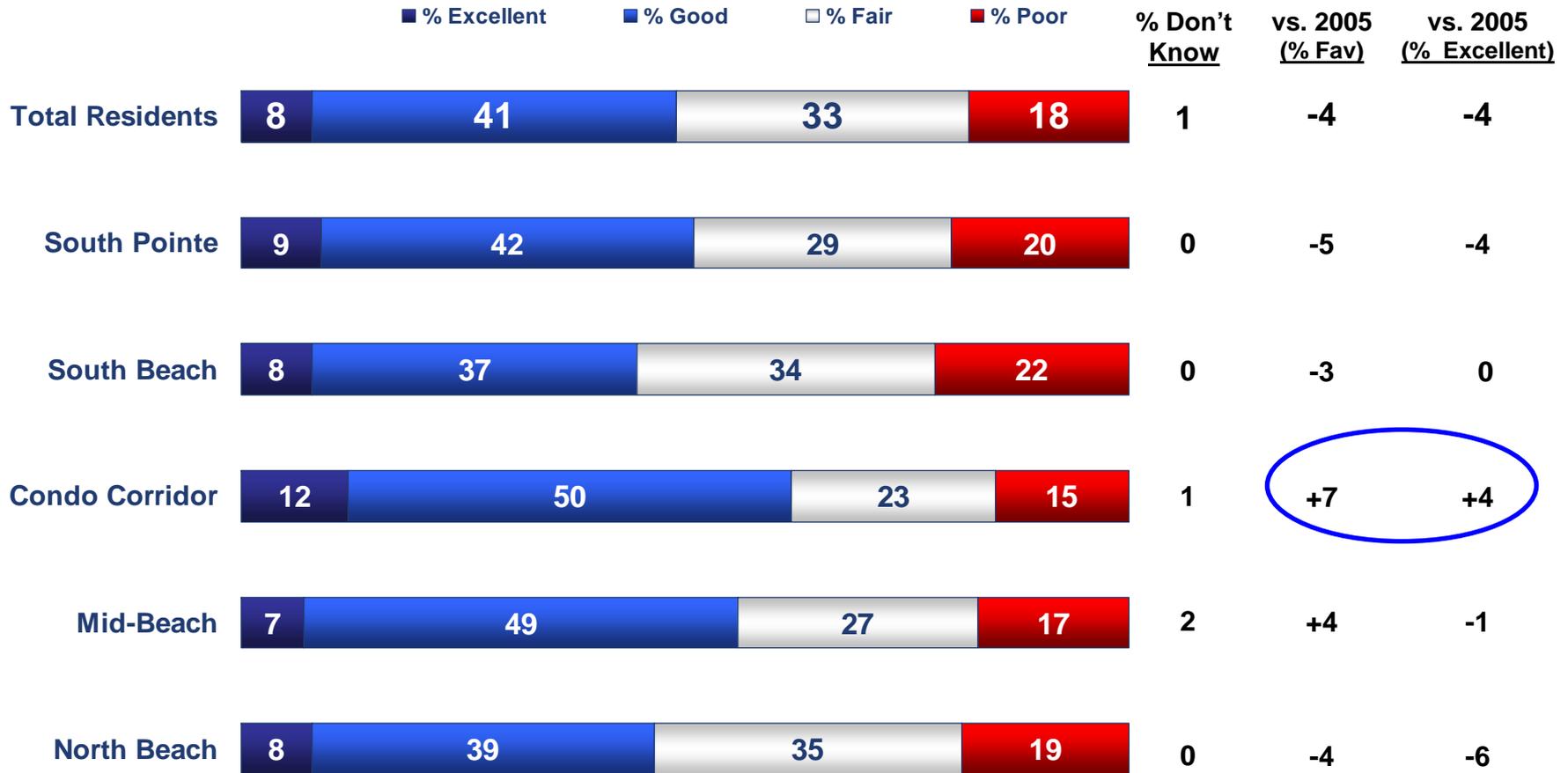
Residents	18	59	19	4	3	0	-7
Businesses	18	57	19	7	1	+8	-2

Maintenance of parks

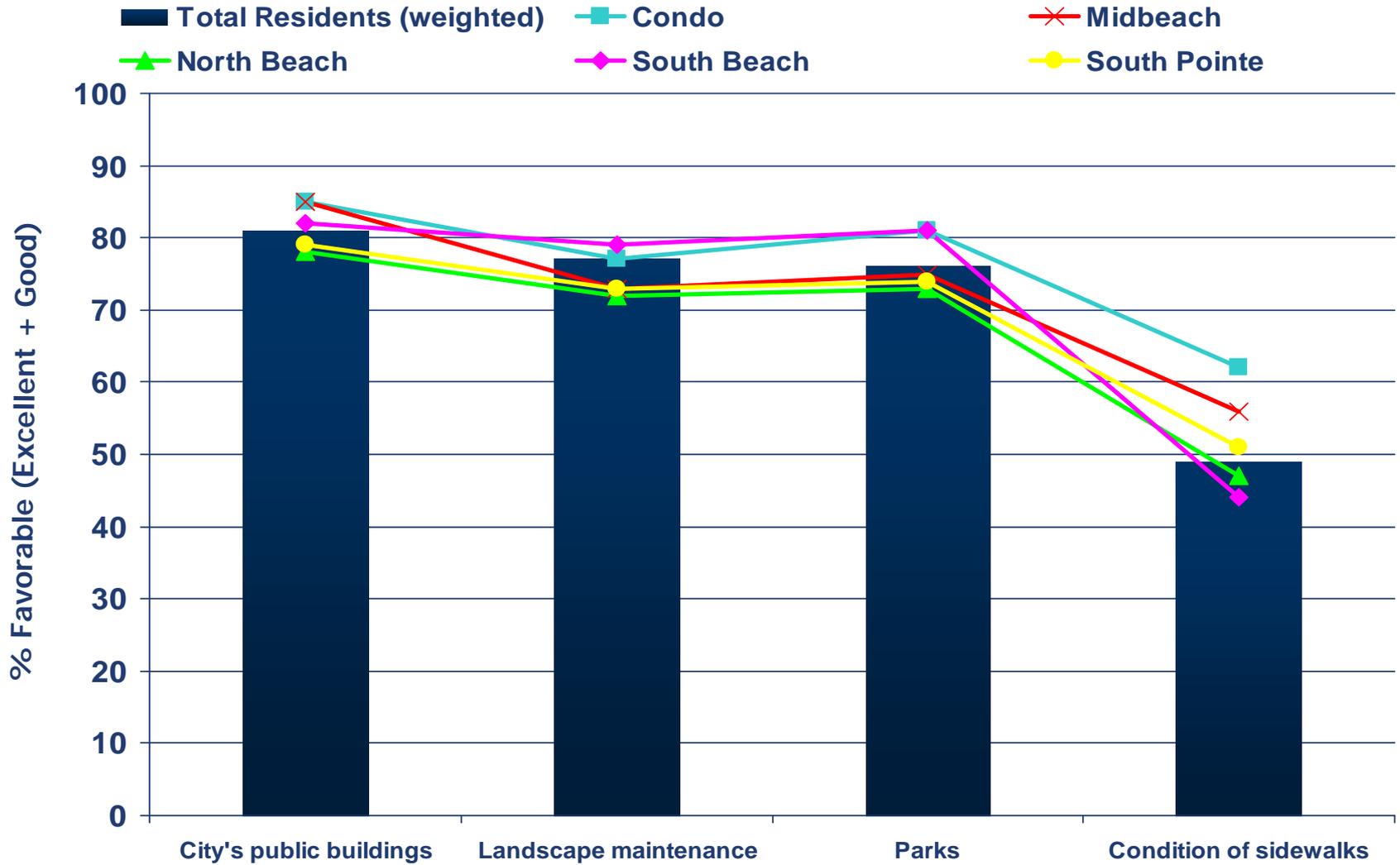
Residents	20	56	19	5	8	-5	-3
Businesses	22	53	18	7	8	+1	+3

City Services – Sidewalks (cont'd)

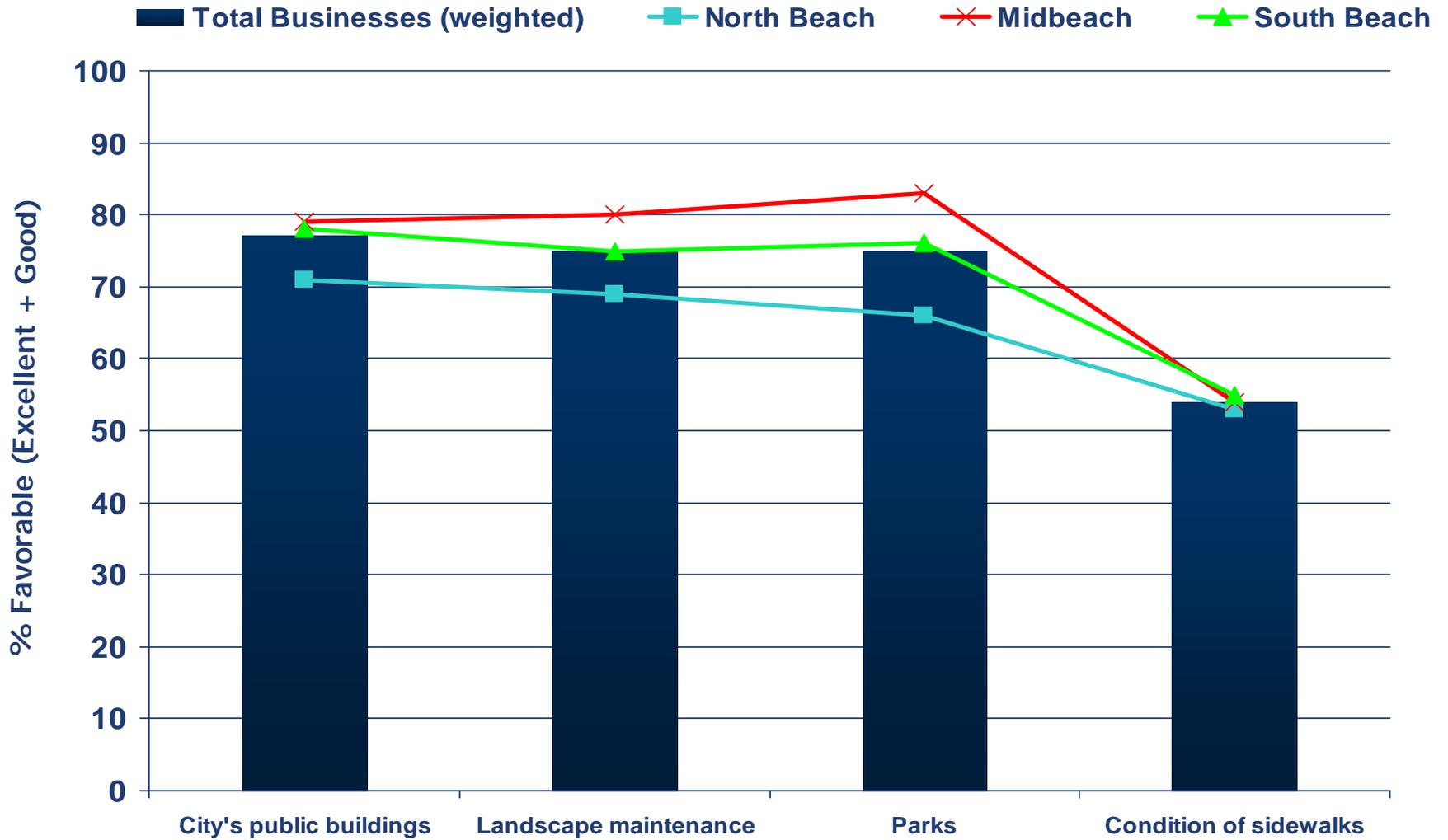
Condition of sidewalks (that is, few or no cracks)



City Services (cont'd) – Residents by Region



City Services (cont'd) – Businesses by Region



City Services (cont'd)

% Excellent
 % Good
 % Fair
 % Poor

					<u>% Don't Know</u>	<u>vs. 2005 (% Fav)</u>	<u>vs. 2005 (% Excellent)</u>
Overall quality of the beaches (cleanliness, water quality, etc)							
Residents	18	57	20	5	6	-5	-8
Businesses	20	57	18	5	6	+3	-2
Recreation programs and facilities							
Residents	16	63	17	4	20	+1	-8
Businesses	25	57	12	6	28	+14	+4
The recently completed capital improvement projects							
Residents	32	52	12	4	6	+1	-3
Businesses	37	49	10	3	6	+7	+5
The City's ability to address homelessness							
Residents	6	26	31	37	11	+1	0
Businesses	6	22	28	44	11	+3	+2

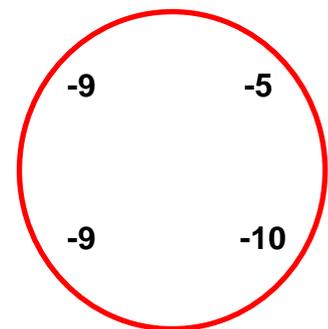
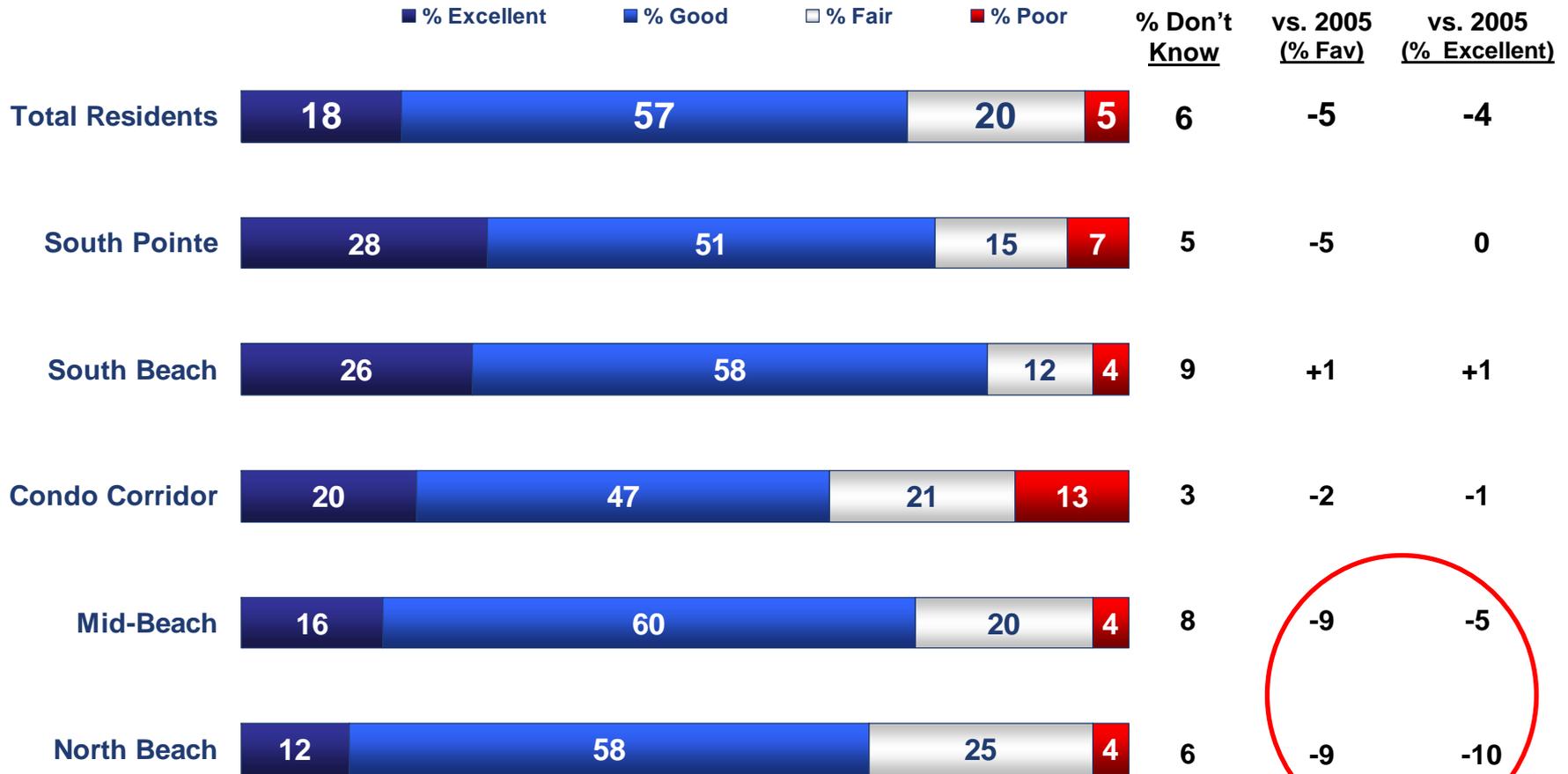
City Services (cont'd) – Residents

Rate the appearance of playgrounds



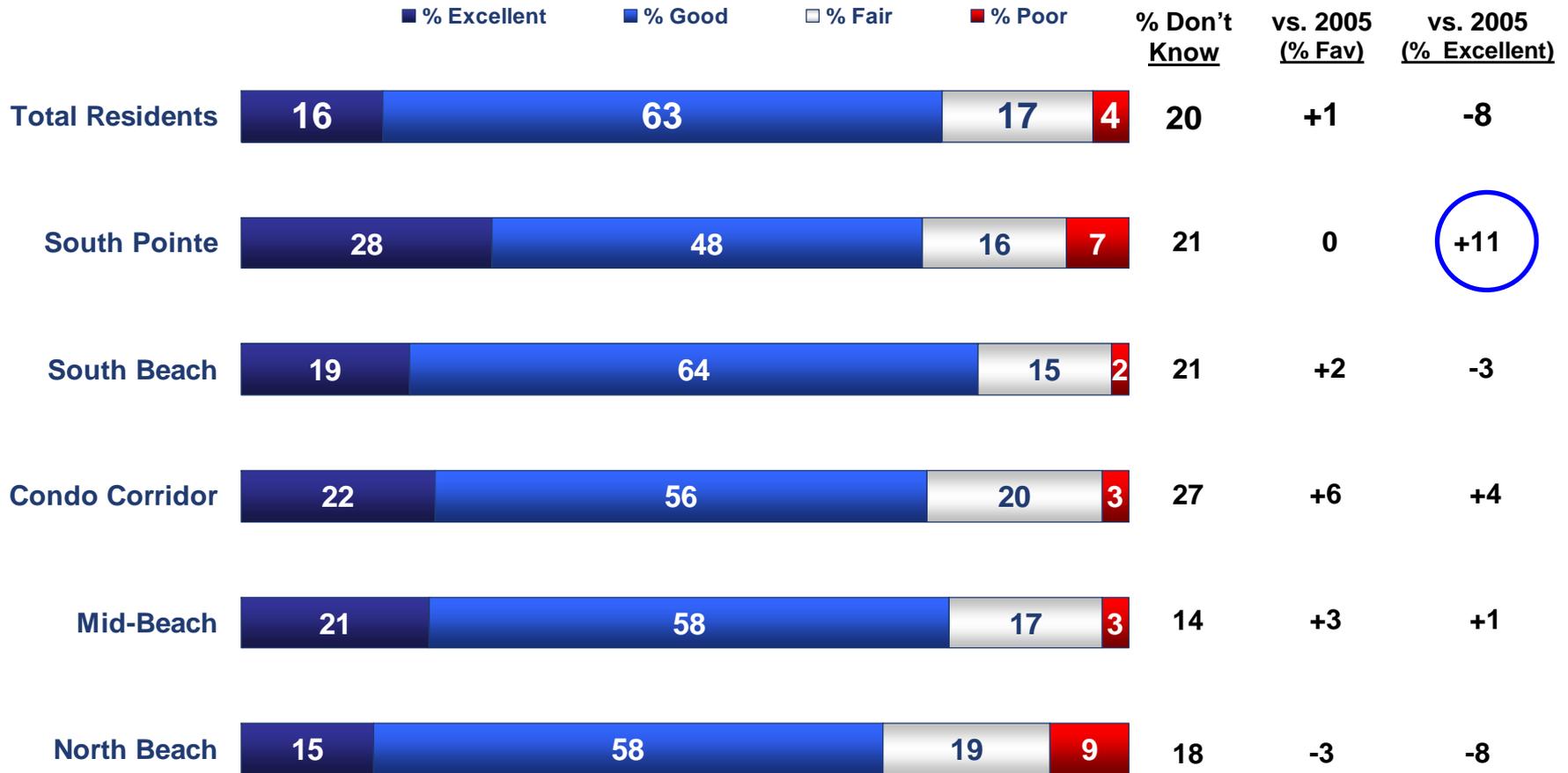
City Services (cont'd) – Residents

Rate the quality of beaches



City Services (cont'd) – Streets

Recreation programs and facilities



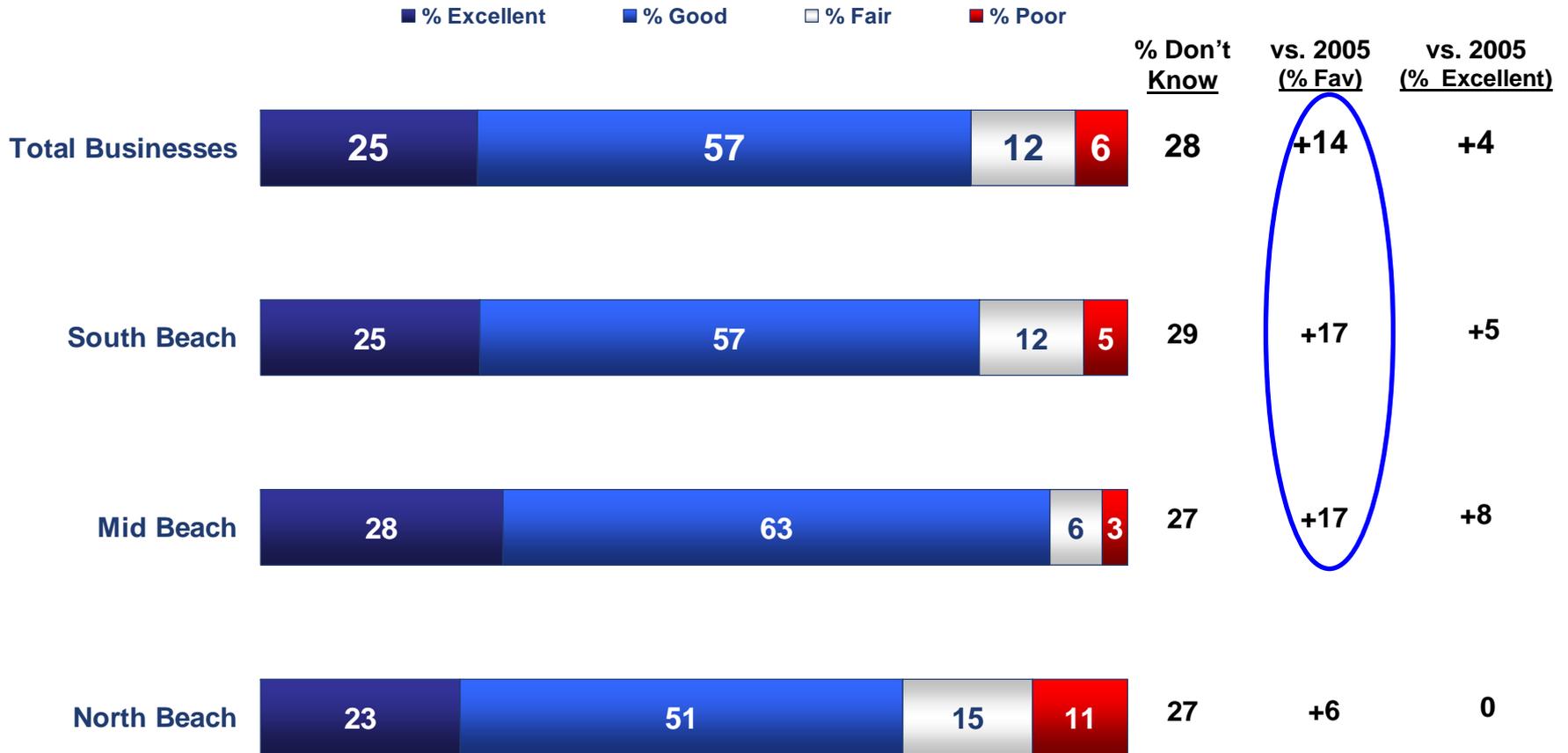
City Services (cont'd) – Streets

The recently completed capital improvement projects



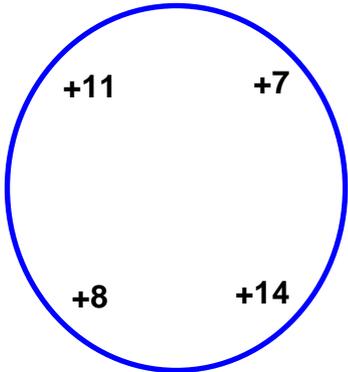
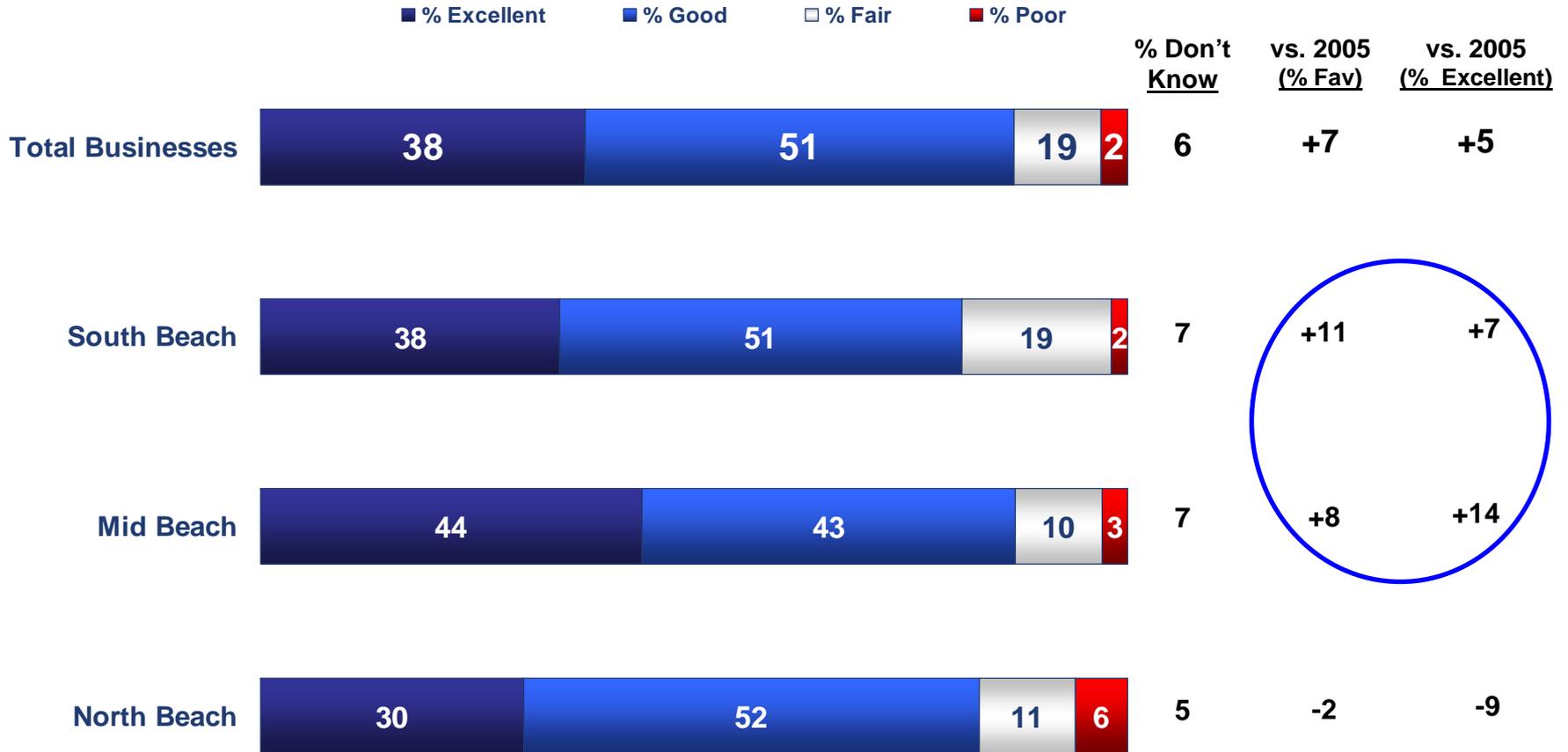
City Services (cont'd) – Streets

Recreation programs and facilities

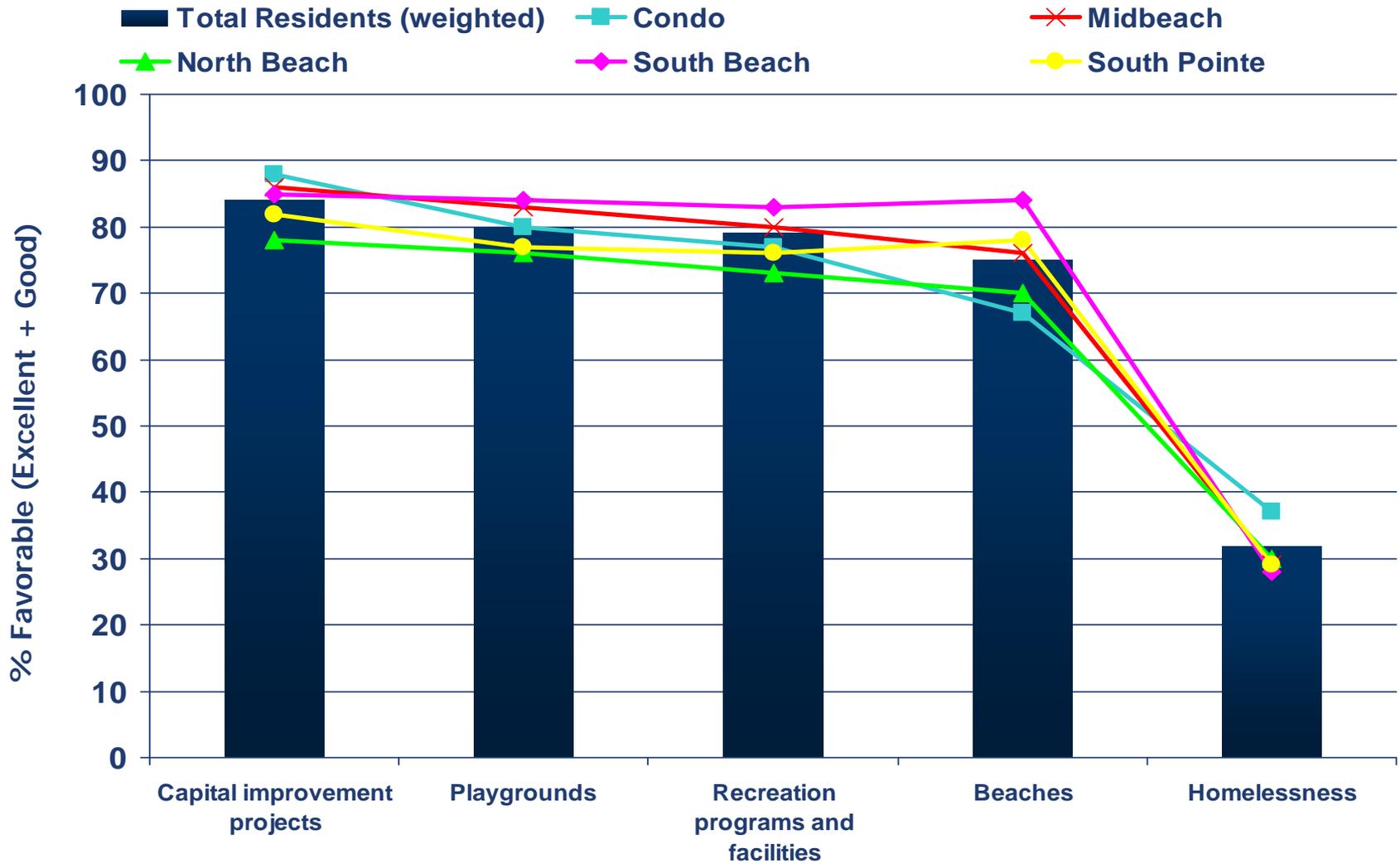


City Services (cont'd) – Streets

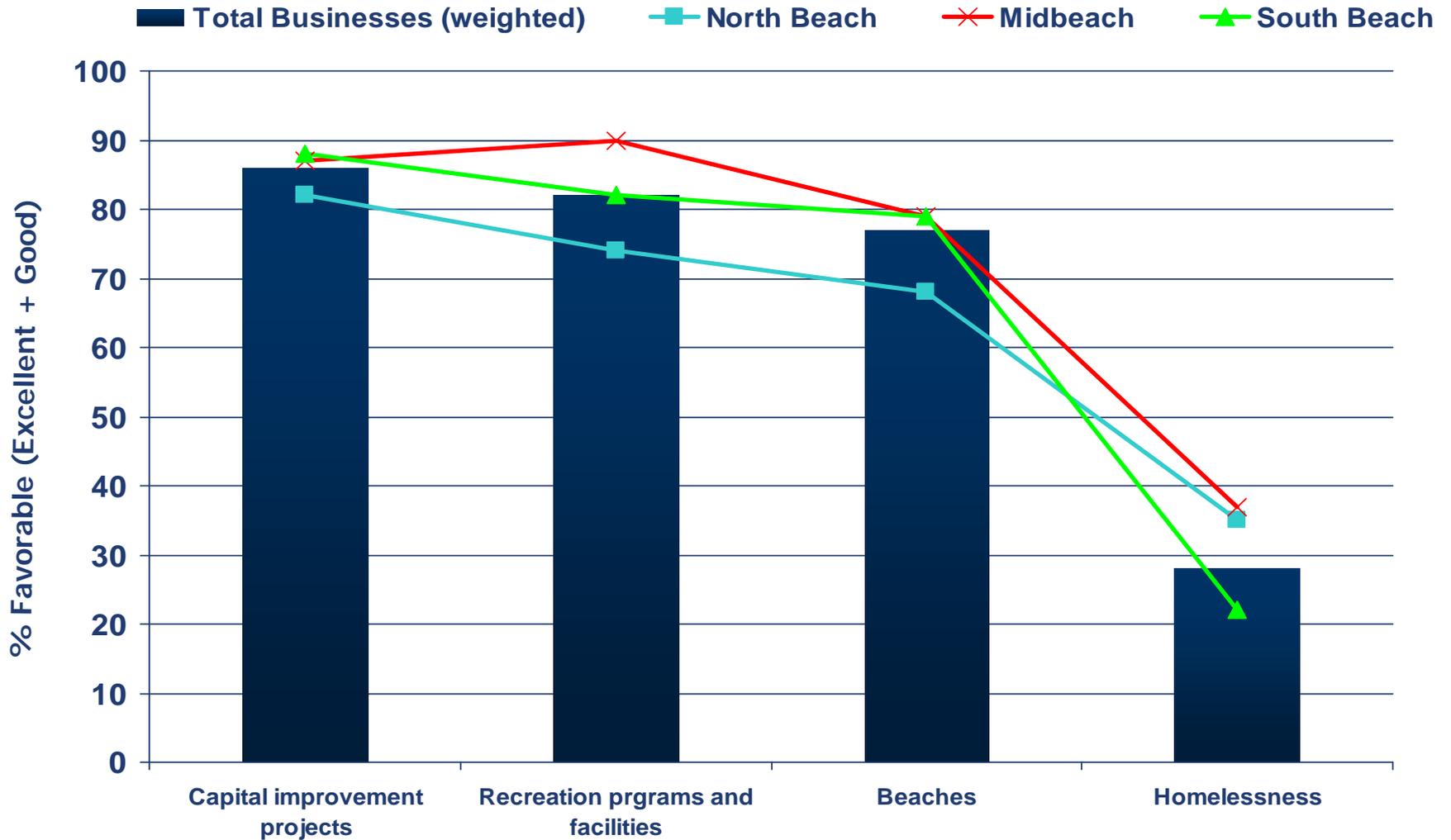
The recently completed capital improvement projects



City Services (cont'd) – Residents by Region

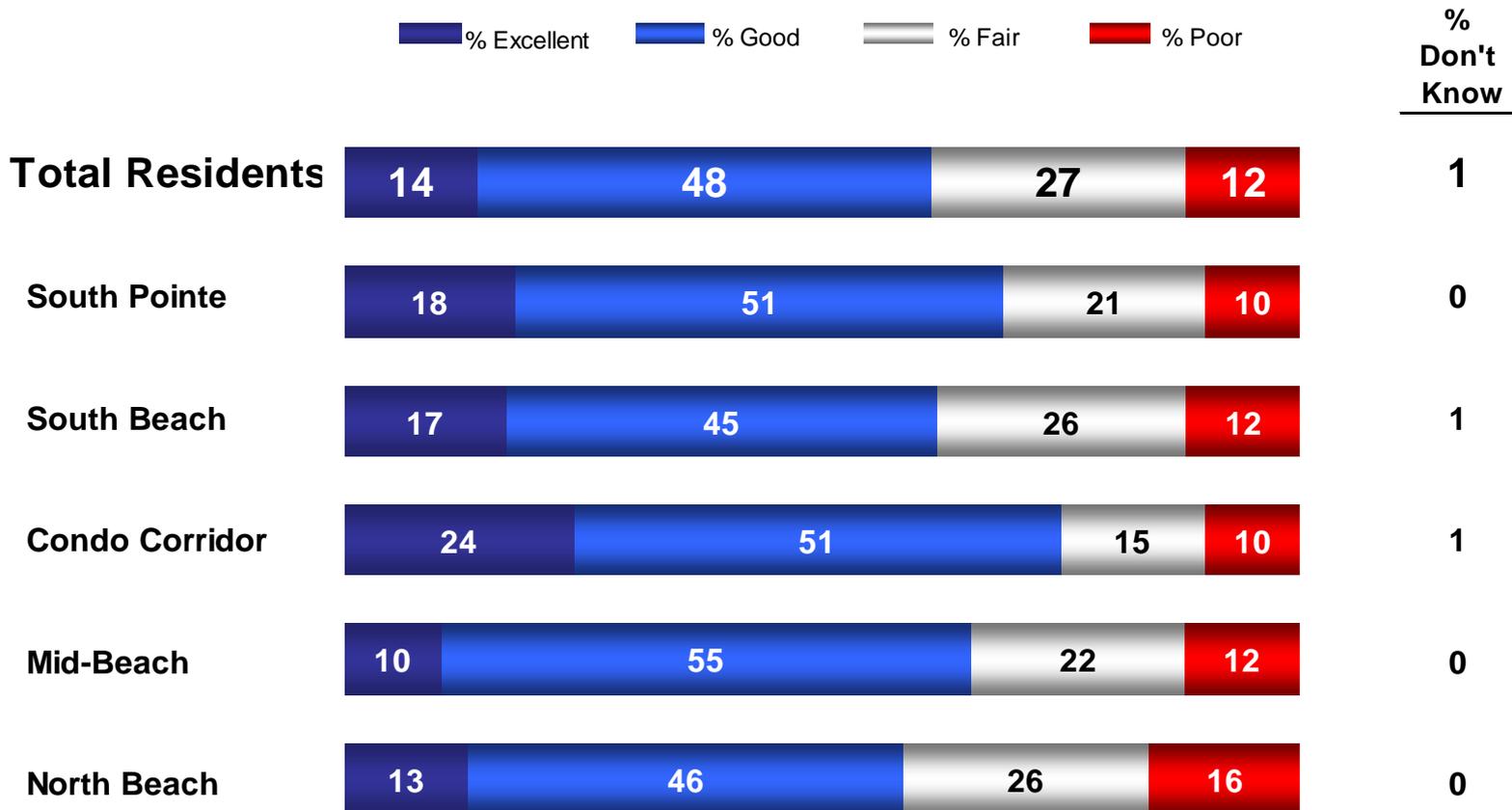


City Services (cont'd) – Businesses by Region



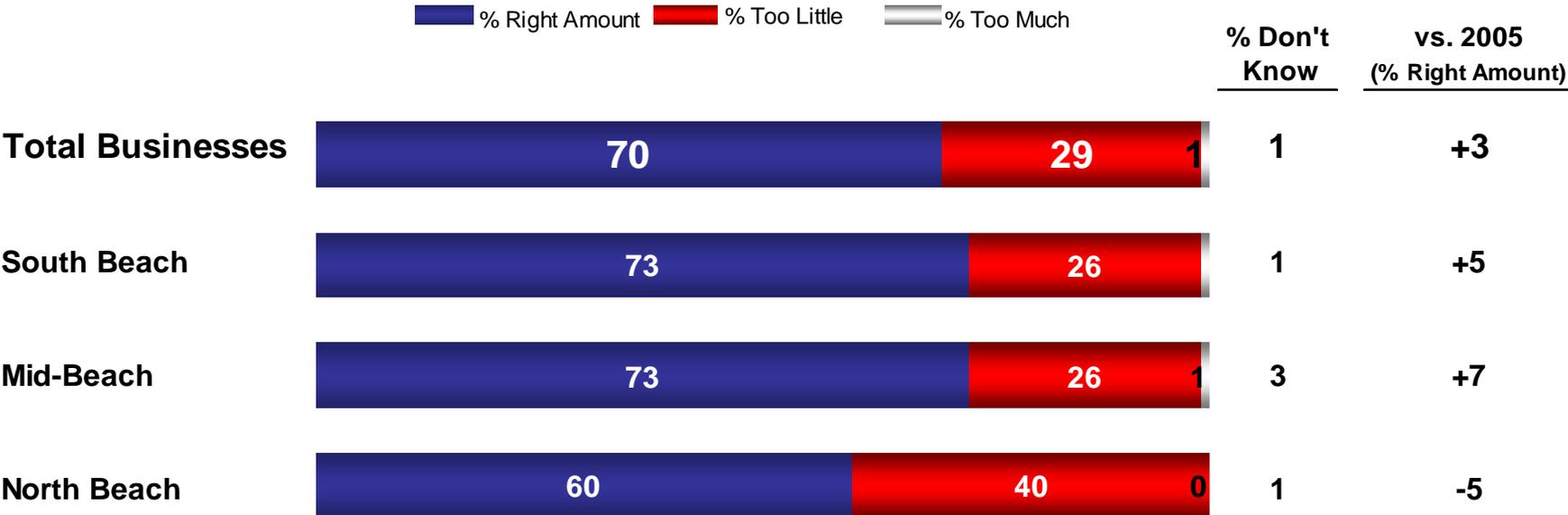
City Services (cont'd) – Street Lighting

Adequacy of street lighting in your neighborhood (sufficient, functioning lights)



City Services (cont'd) – Street Lighting

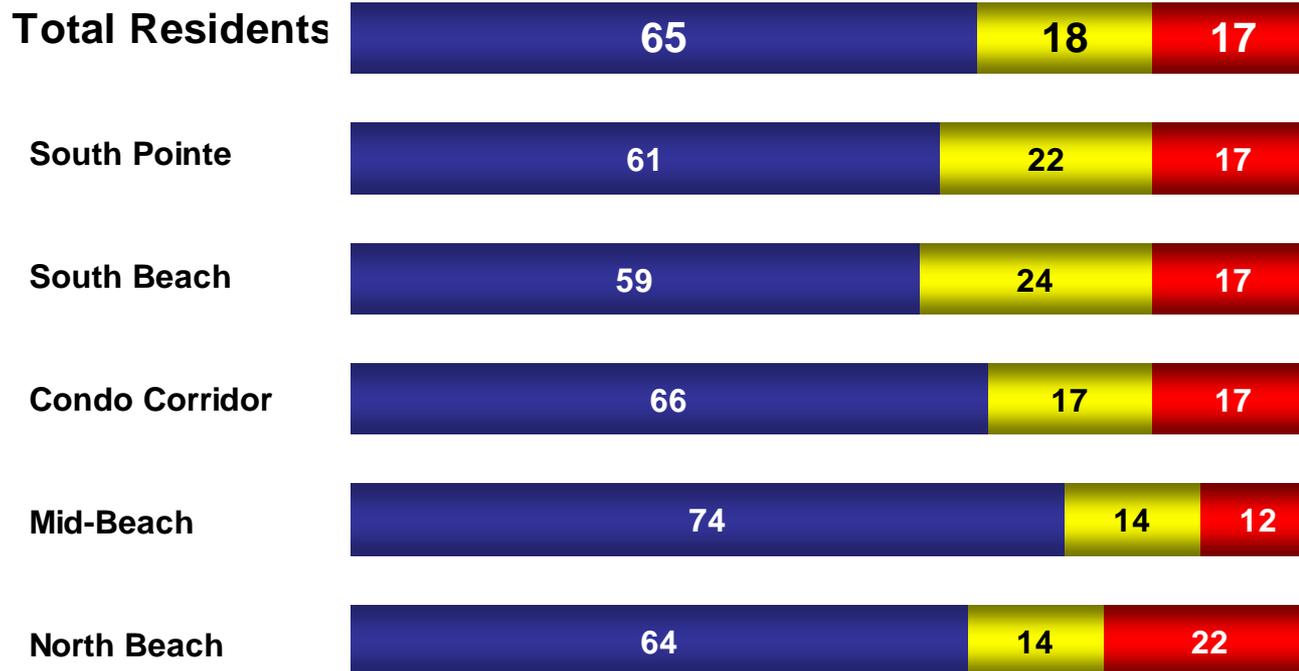
How adequate is the amount of public street lighting at night in your business area?



Dog-Friendliness

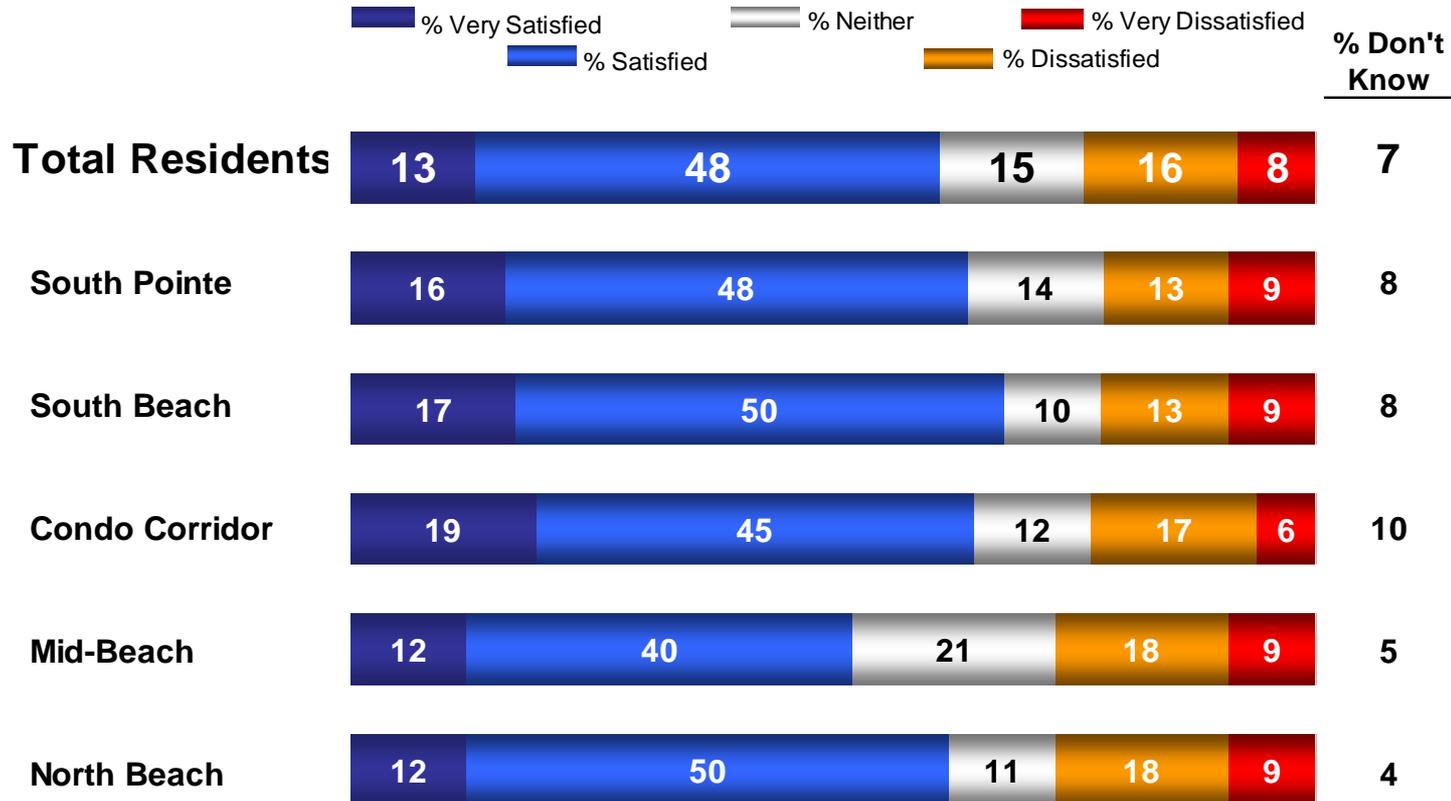
The amount done by the City of Miami Beach to be dog-friendly

■ % Right Amount ■ % Too Much ■ % Too Little



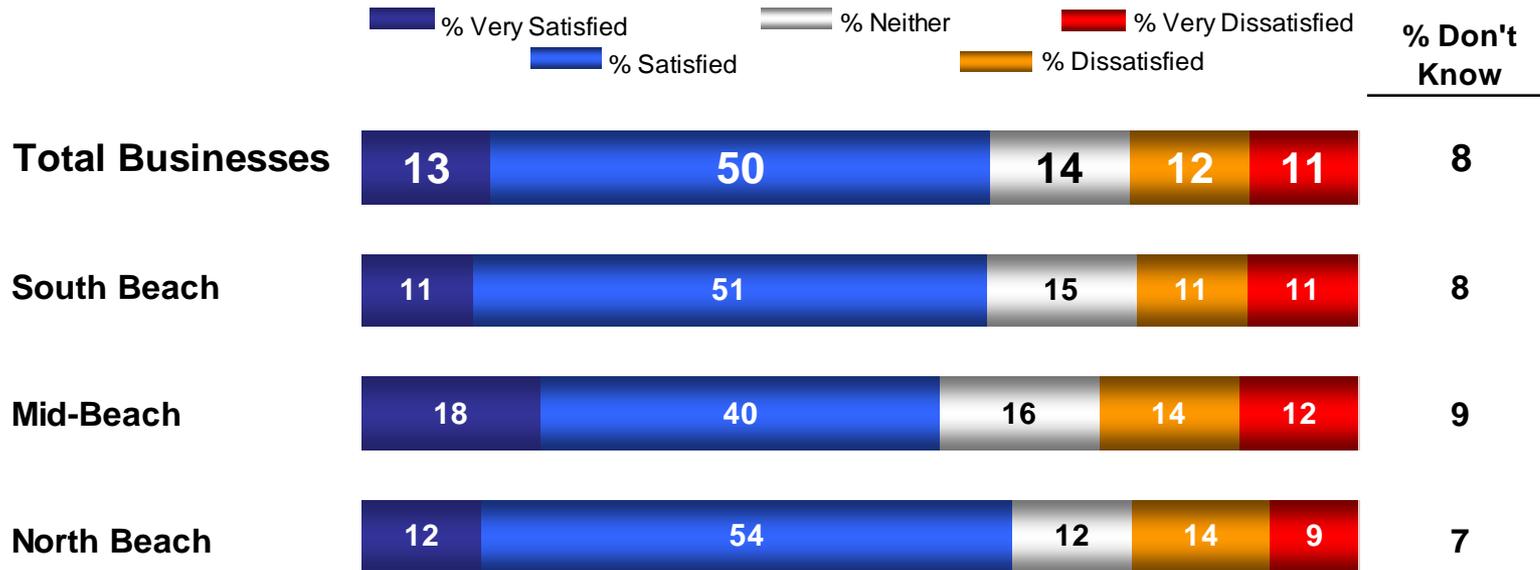
Code Enforcement

How satisfied are you with the fairness and consistency of the enforcement of codes and ordinances in your neighborhood?



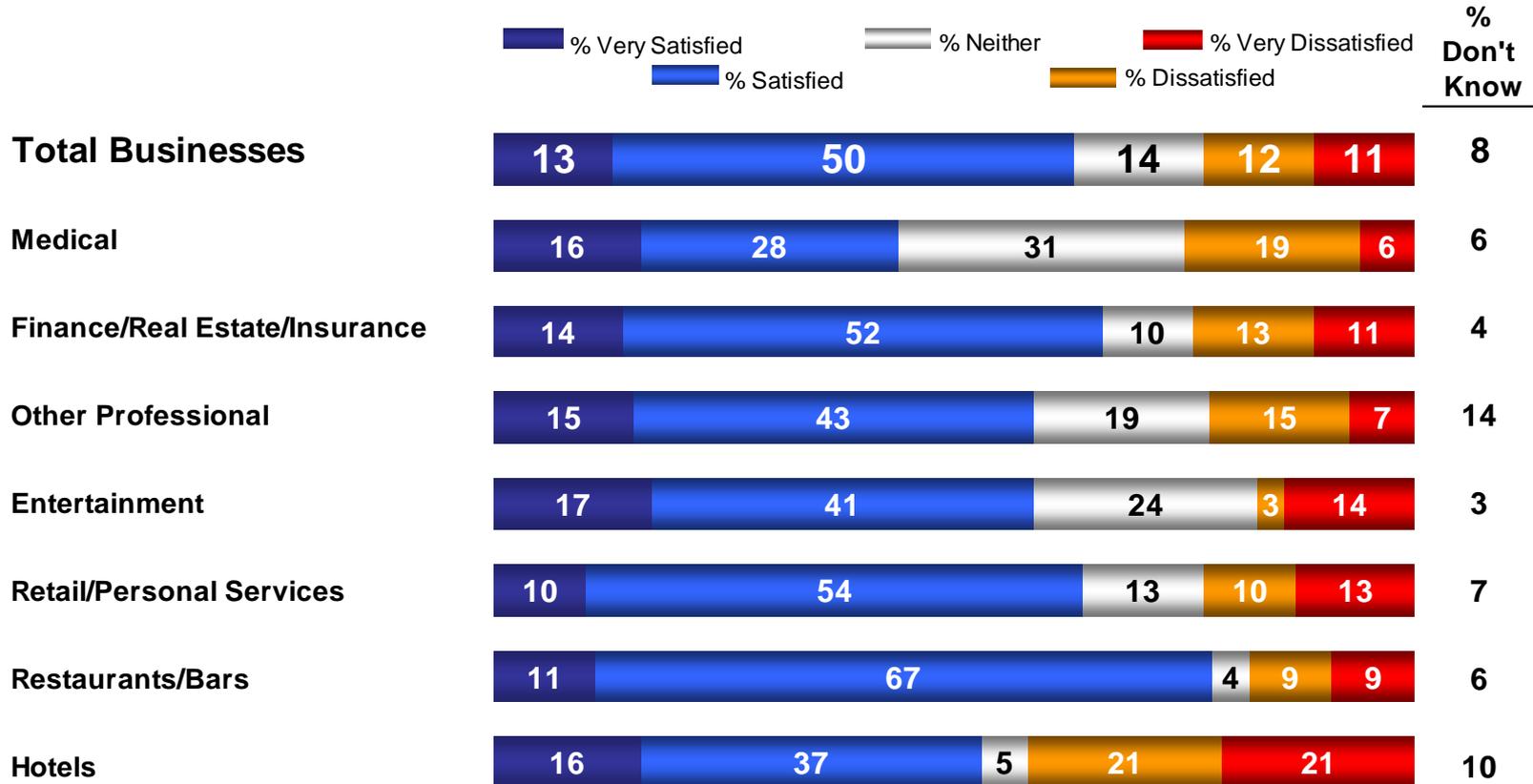
Code Enforcement (cont'd)

How satisfied are you with the fairness and consistency of enforcement of zoning and ordinances by the City of Miami Beach government for businesses?



Code Enforcement (cont'd)

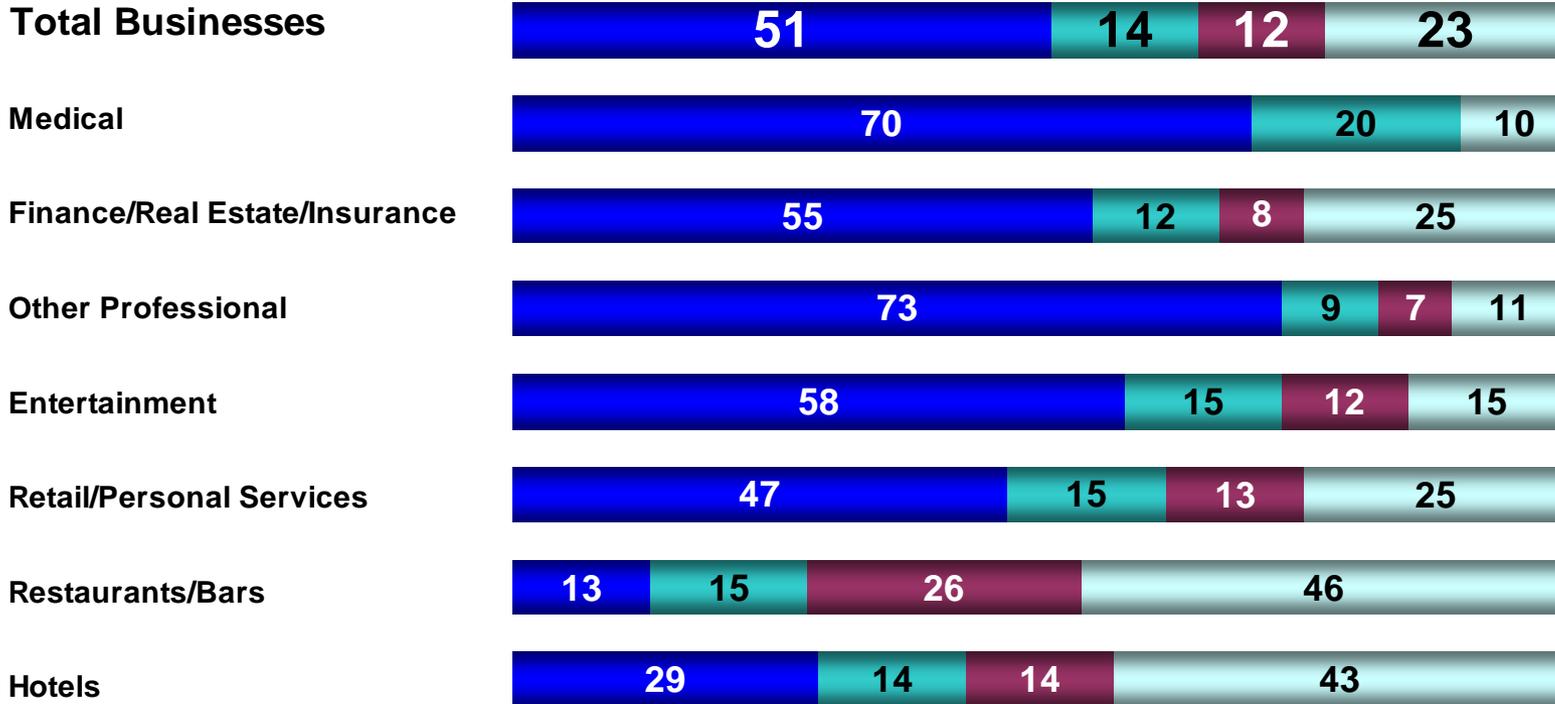
How satisfied are you with the fairness and consistency of enforcement of zoning and ordinances by the City of Miami Beach government for businesses?



Code Enforcement (cont'd)

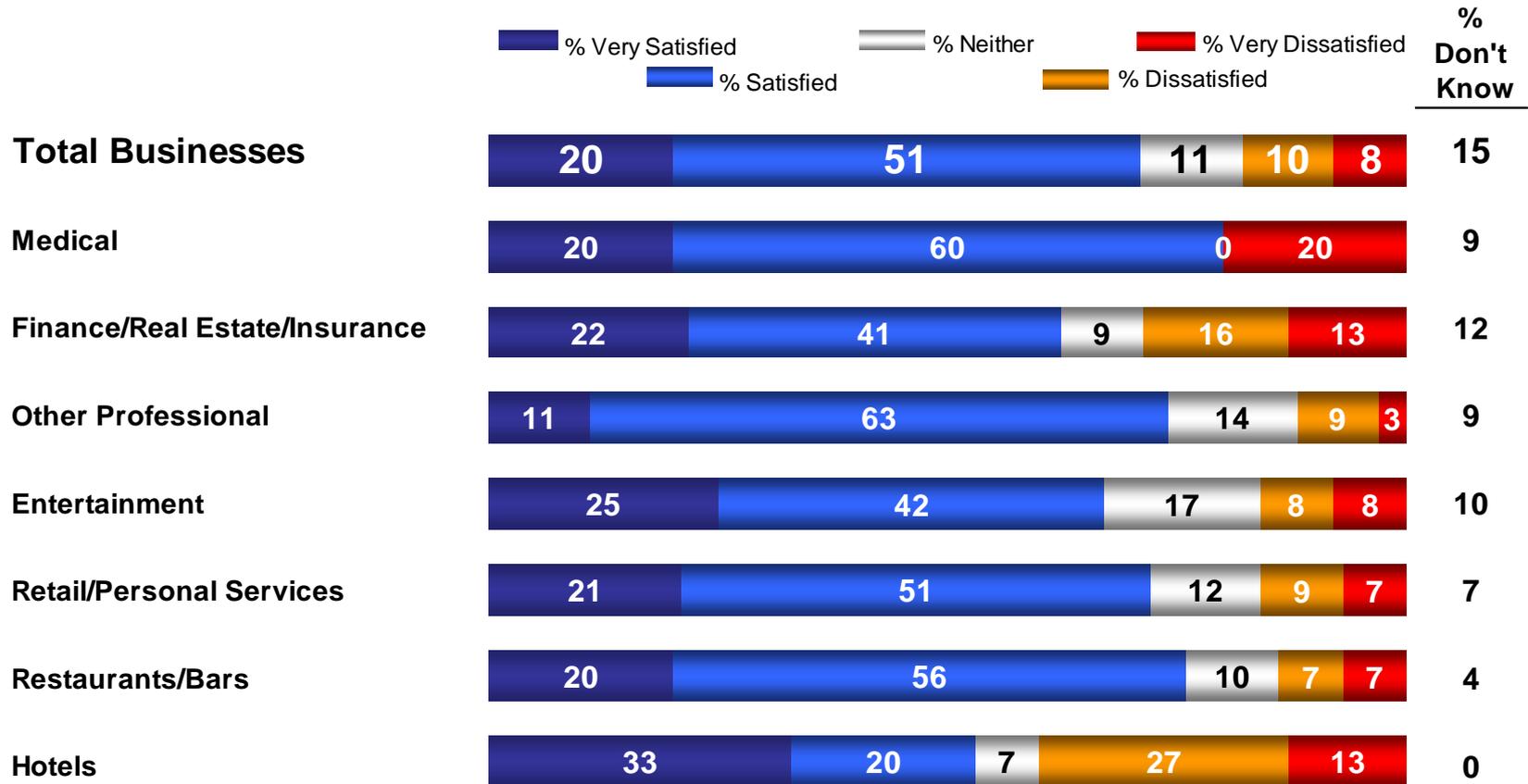
During the past 12 months, how many times has your establishment been inspected for outside sidewalk/café permit compliance, sanitation, or other use of public property?

■ % None ■ % Once
■ % Twice ■ % Three or More Times



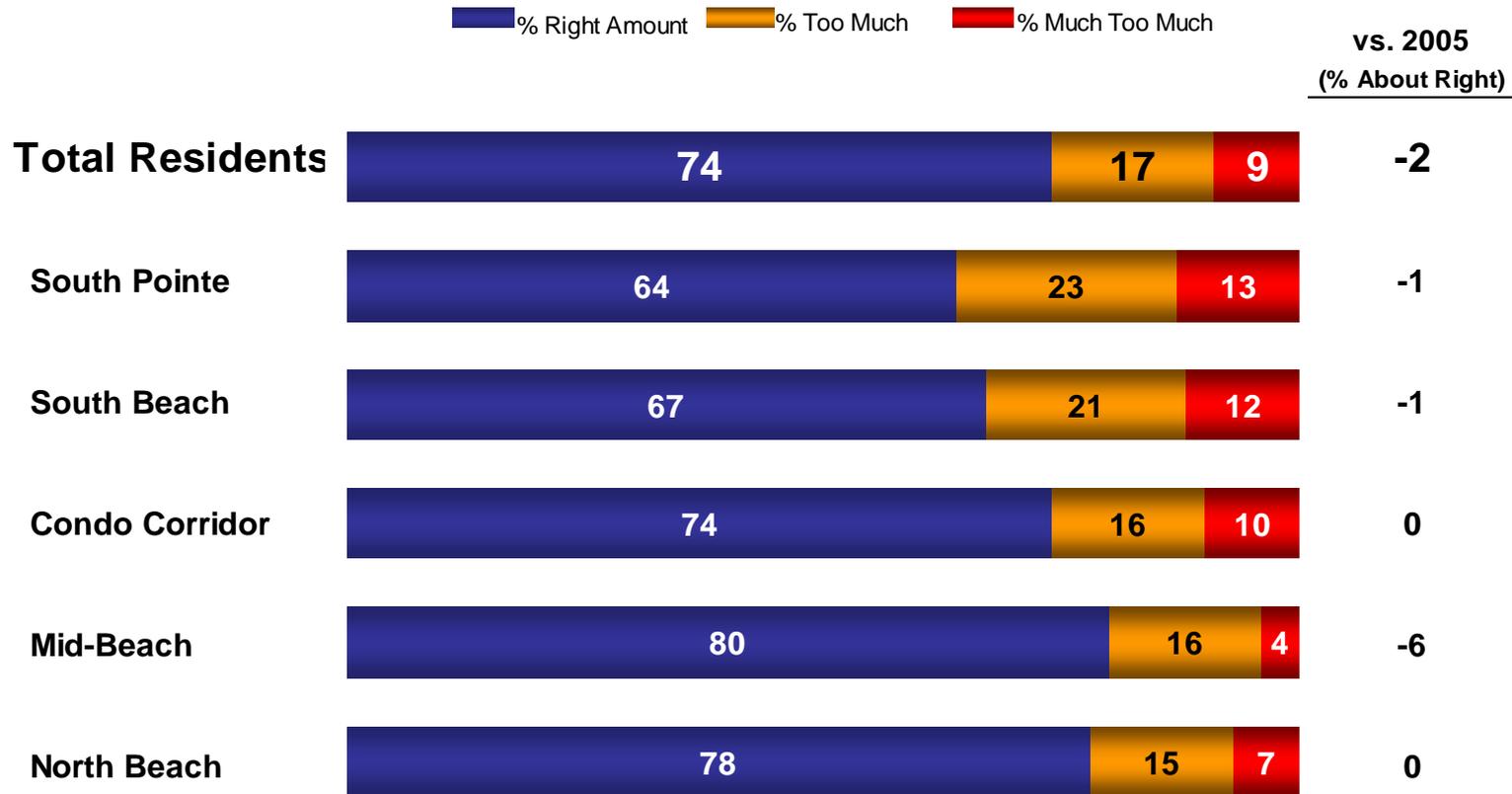
Code Enforcement (cont'd)

How satisfied are you with the fairness and consistency of these inspections?



Code Enforcement (cont'd) – Residents

The amount of noise in your neighborhood on a typical day



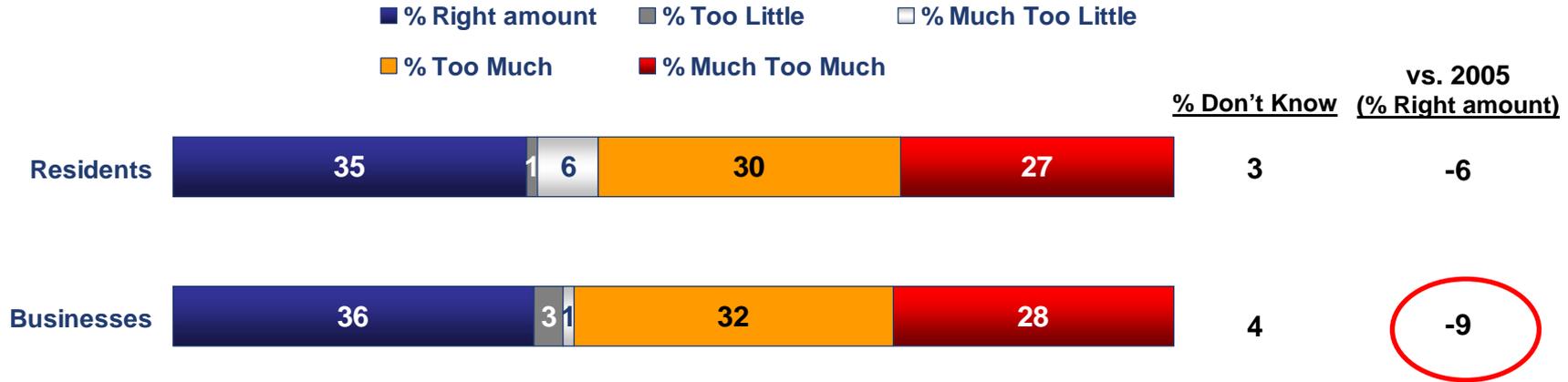
Code Enforcement (cont'd) – Businesses

What is the main cause of nuisance noise or disturbances in the City of Miami Beach?
[BUSINESSES]

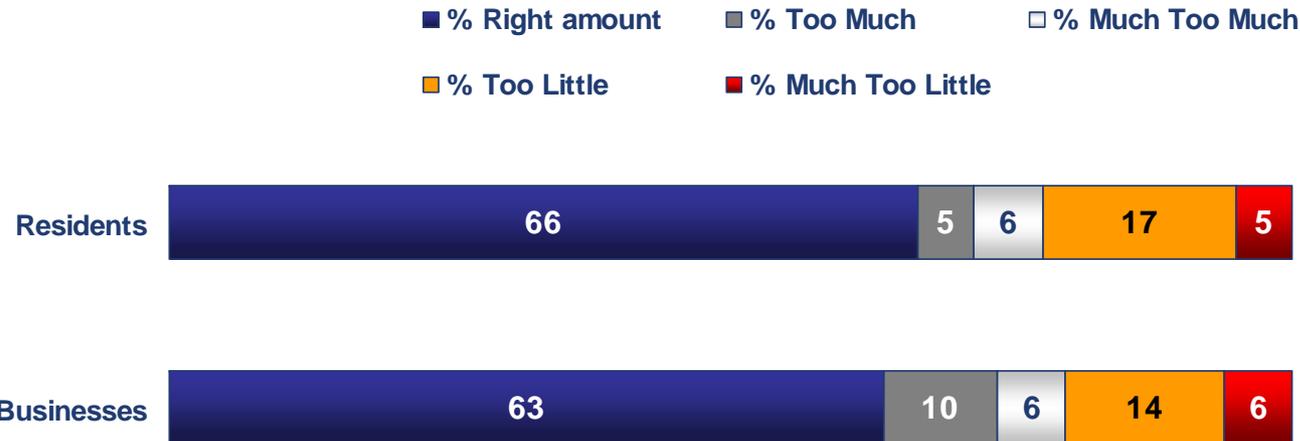
<u>Option</u>	<u>%</u> <u>TOTAL</u>	<u>%</u> <u>NB</u>	<u>%</u> <u>MB</u>	<u>%</u> <u>SB</u>
1) Traffic	29	35	44	23
2) None/Nothing	18	15	11	21
3) Construction	17	22	16	16
4) Car horns and motorcycles	14	13	9	16
5) Nightclubs	7	5	4	8
6) Festivals/events	5	3	8	5
7) Buses/trucks	4	3	3	5
8) Restaurants	0	0	0	1
Other*	4	3	6	4

Construction/Development

Pace of new construction across the City of Miami Beach

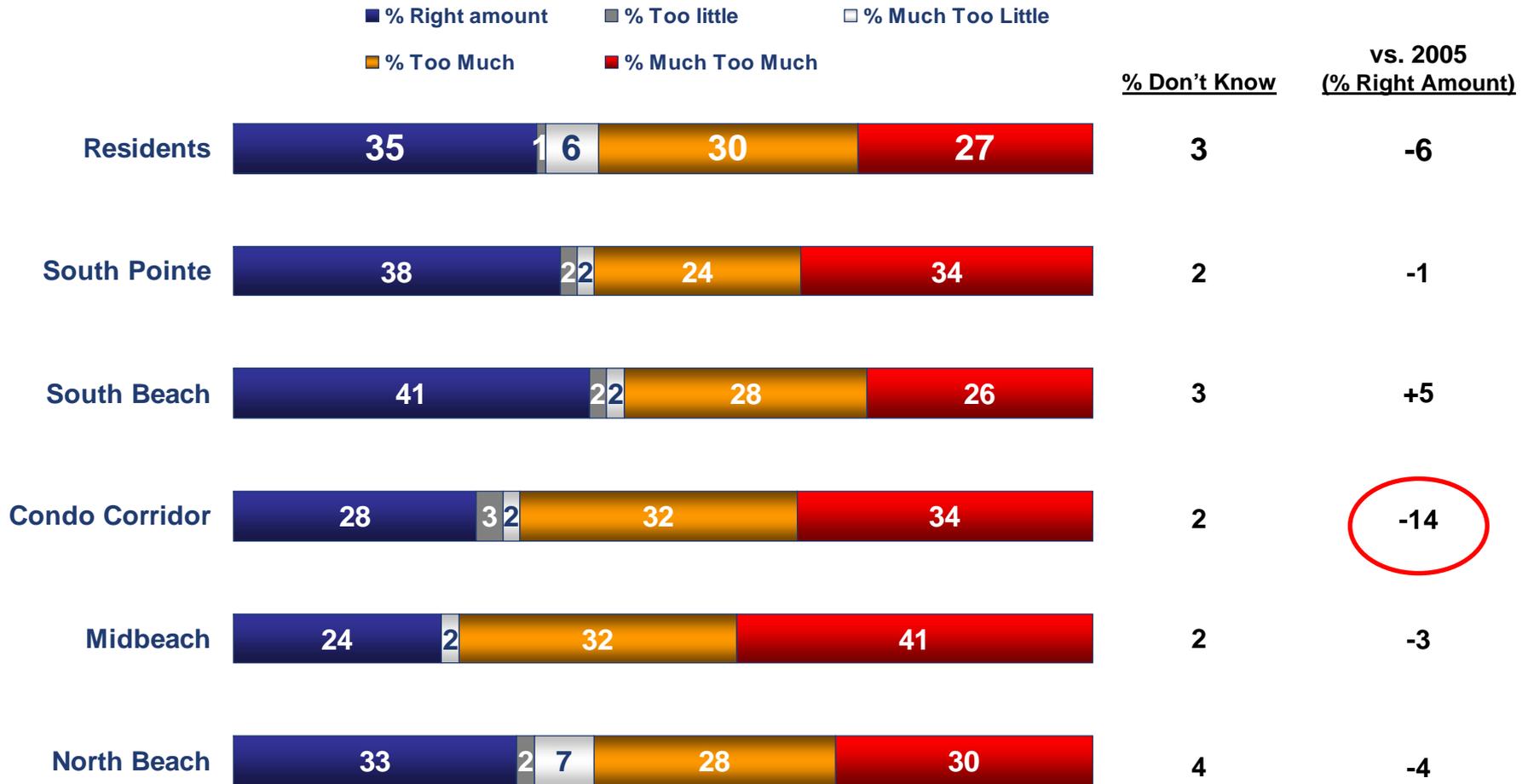


Amount done for historic preservation



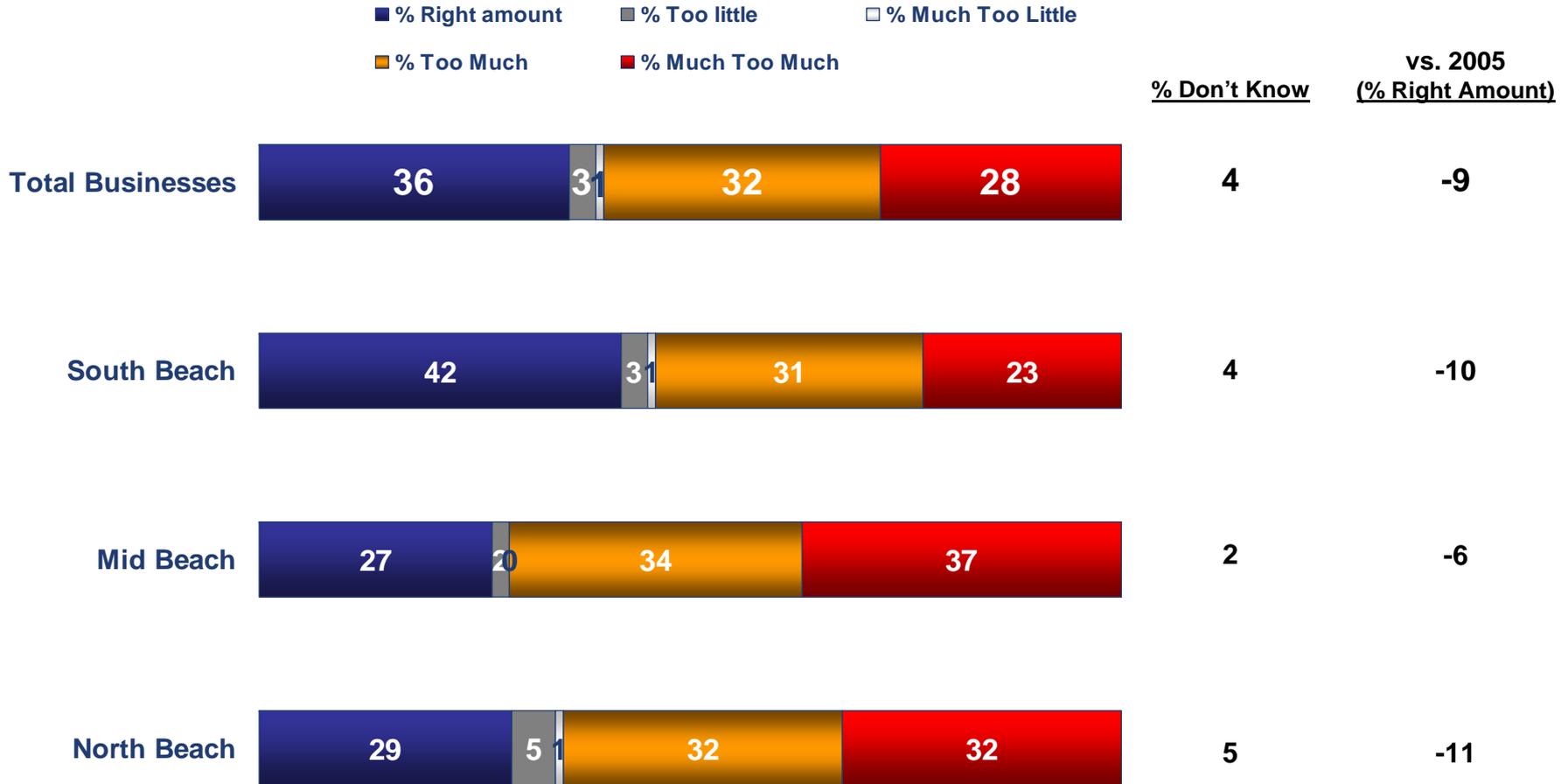
Construction/Development (cont'd) – Residents

Pace of new construction across the City of Miami Beach



Construction/Development (cont'd) – Businesses

Pace of new construction across the City of Miami Beach



Construction/Development – Impact of Construction

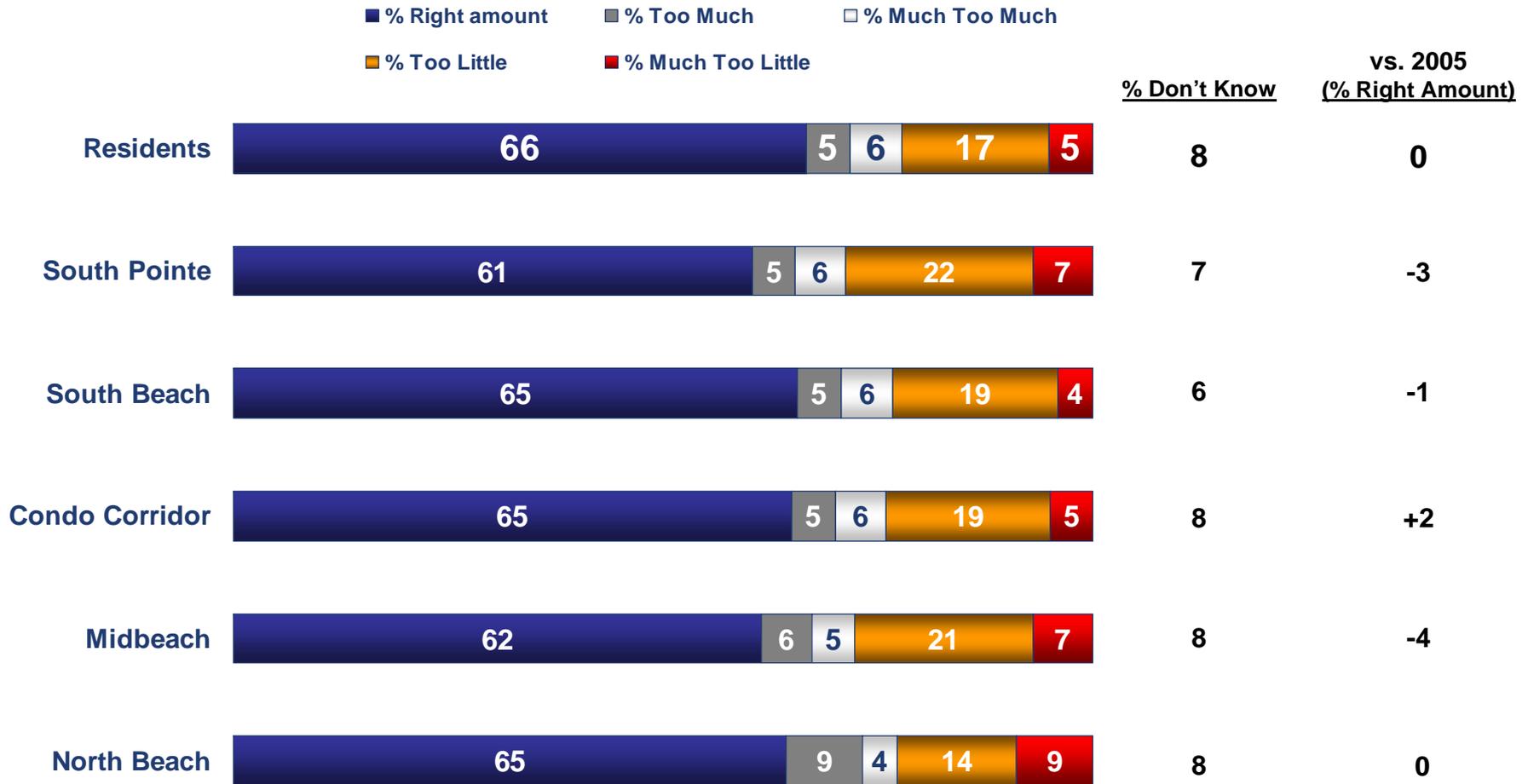
What is most important to you with regards to the impact of construction across Miami Beach? [RESIDENTS]

<u>Option</u>	% <u>TOTAL</u>	% <u>NB</u>	% <u>MB</u>	% <u>CC</u>	% <u>SB</u>	% <u>SP</u>
1) Traffic/congestion	59	64	53	53	43	43
2) High rises on the waterfront	19	18	22	18	19	24
3) Neighborhood (noise, debris, etc.)	14	10	13	16	19	19
4) Oversize homes/McMansions	5	2	6	4	6	4
Other*	3	4	3	2	4	4
Don't know	5	1	3	6	10	6

** Most commonly mentioned included 'all of the above', providing affordable housing*

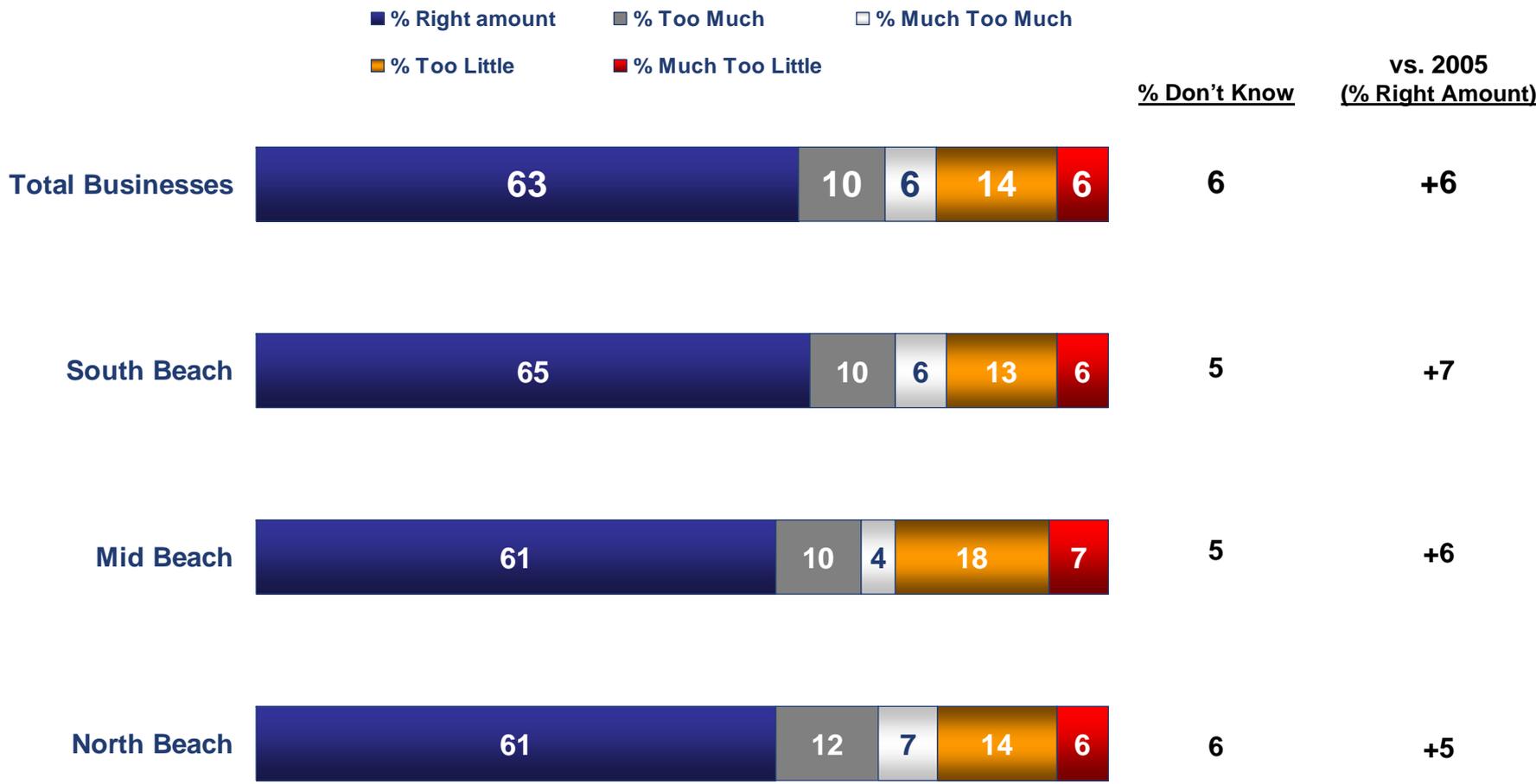
Construction/Development (cont'd) – Residents

Amount done for historic preservation



Construction/Development (cont'd) – Businesses

Amount done for historic preservation



Construction/Development – Historic Preservation

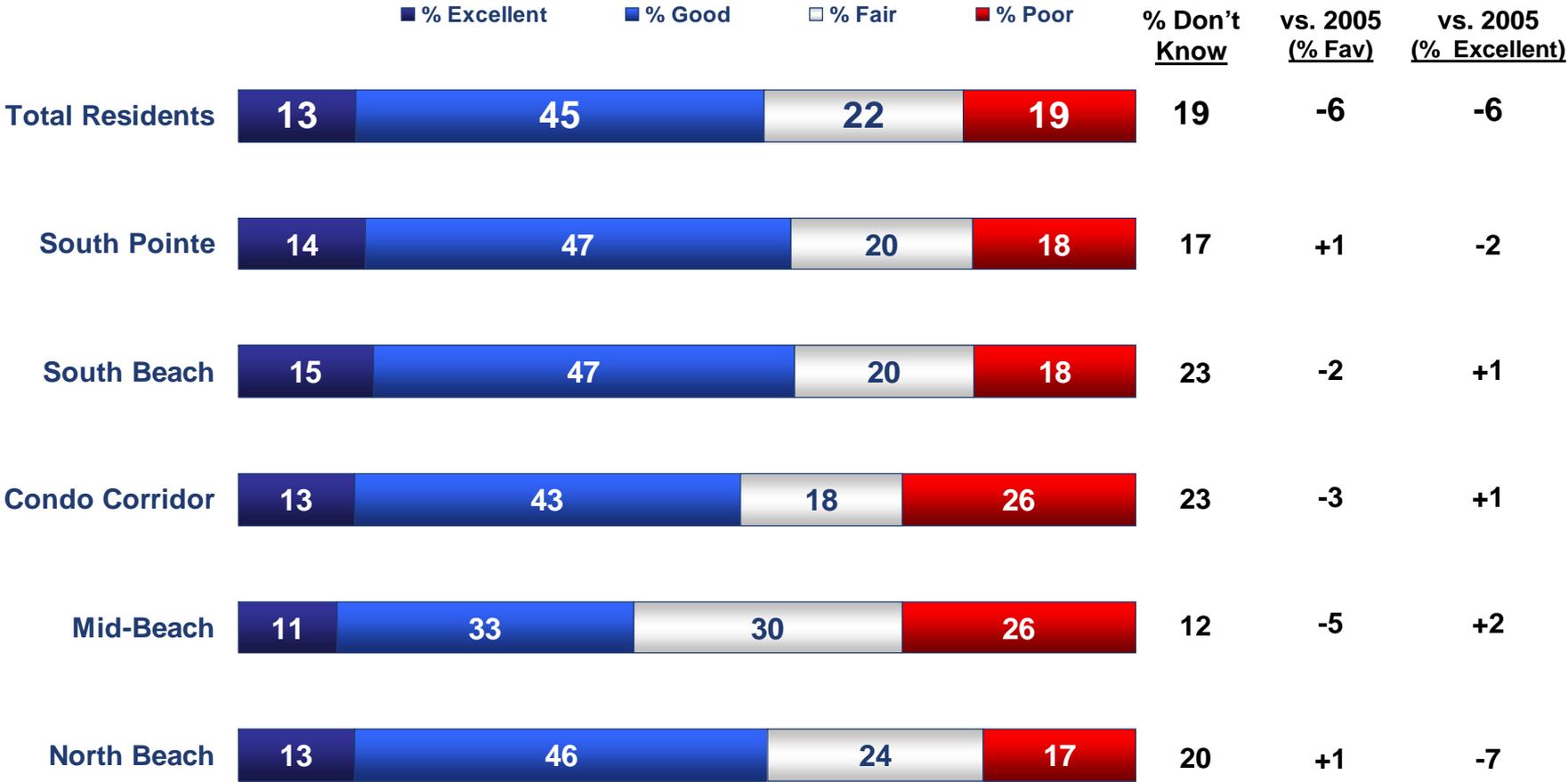
What do you feel is most important to address with regards to historic preservation?
[RESIDENTS]

<u>Option</u>	% <u>TOTAL</u>	% <u>NB</u>	% <u>MB</u>	% <u>CC</u>	% <u>SB</u>	% <u>SP</u>
1) Maintaining neighborhoods	45	36	55	47	42	43
2) Historic structures well-maintained	40	42	33	33	40	40
3) Expansion of historic district	14	15	8	11	11	8
Other*	1	1	1	1	1	3
Don't know	6	6	3	8	7	6

* Most commonly mentioned included 'all of the above'

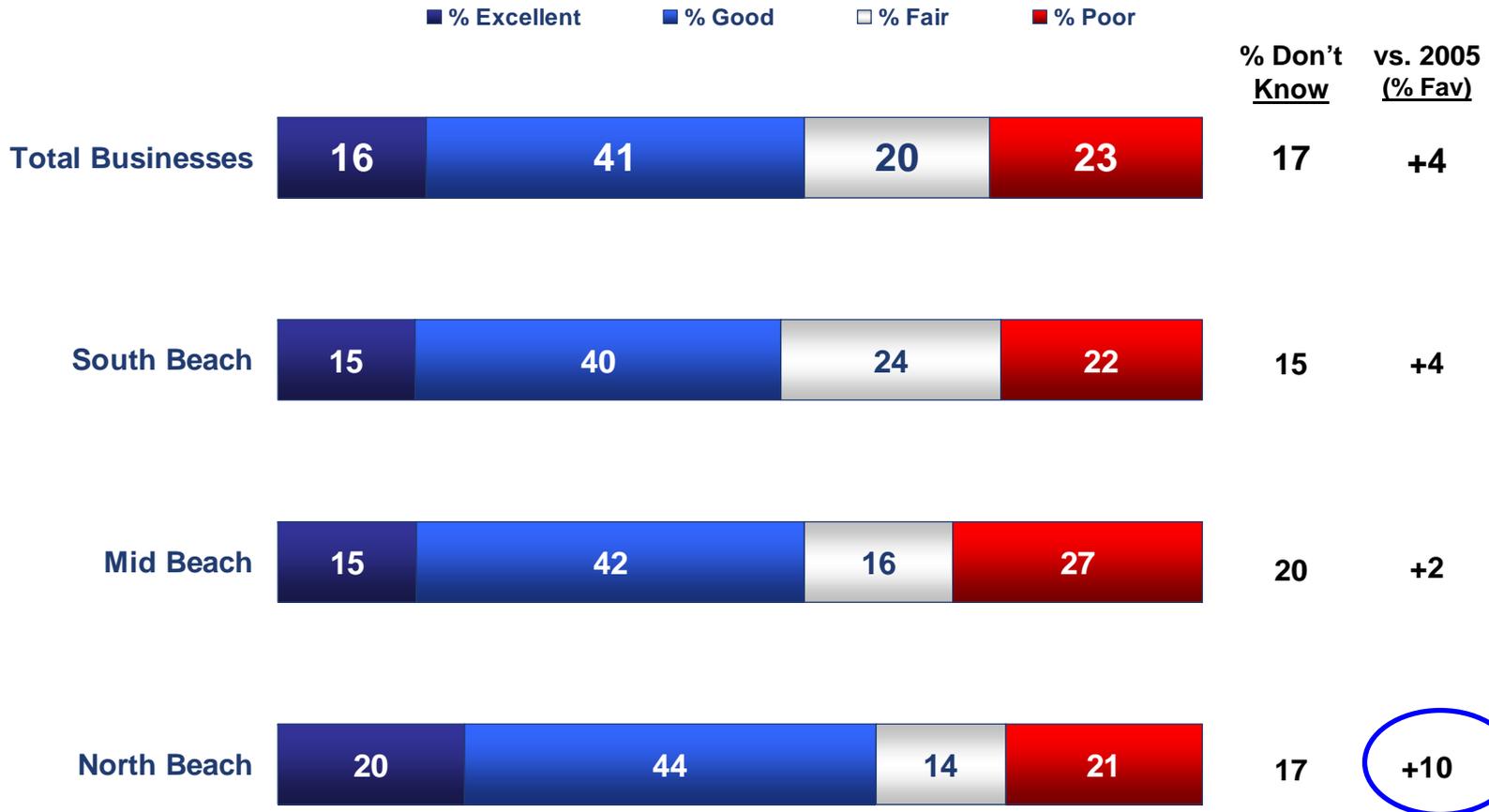
Construction/Development (cont'd)– Residents

Rate building code enforcement (new construction and renovation)



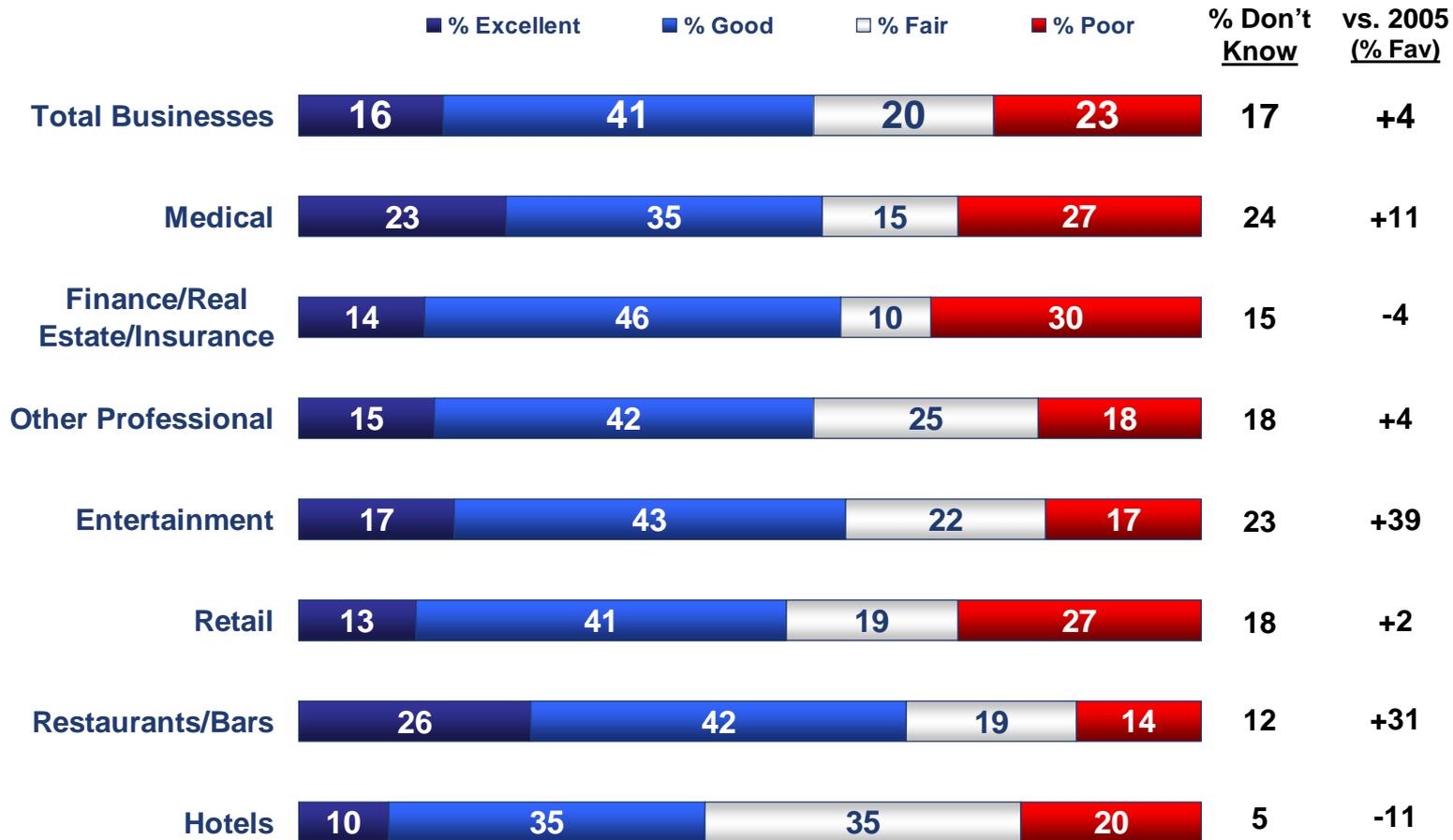
Construction/Development (cont'd) – Businesses

Rate building code enforcement (new construction and renovation)



Construction/Development (cont'd) – By Business Type

Rate building code enforcement (new construction and renovation)



Construction/Development – Housing

Which do you feel the City should most ensure with regards to housing in the City of Miami Beach? [RESIDENTS]

<u>Option</u>	% <u>TOTAL</u>	% <u>NB</u>	% <u>MB</u>	% <u>CC</u>	% <u>SB</u>	% <u>SP</u>
1) Housing for <\$50k income	30	33	16	19	28	23
2) Housing for elderly/seniors	26	26	23	26	31	23
3) Housing for \$50-80k income	21	13	20	18	16	17
4) No action needed	12	9	15	14	11	18
5) Retention of rental units	7	7	9	8	6	13
Other*	5	4	7	6	3	2
Don't know	8	11	10	7	5	5

**Most commonly mentioned included: Affordable housing for young families, limit construction, let the free-market decide*

Construction/Development – Housing

Which do you feel the City should most ensure with regards to housing in the City of Miami Beach? [RESIDENTS]

<u>Option</u>	% <u>TOTAL</u>	% <u><\$25k</u>	% <u>\$25-49k</u>	% <u>\$50-74k</u>	% <u>\$75-99k</u>	% <u>\$100-199k</u>	% <u>\$200k+</u>
1) Housing for <\$50k income	30	26	46	25	23	12	8
2) Housing for elderly/seniors	26	43	20	15	15	22	16
3) Housing for \$50-80k income	21	5	7	31	31	26	24
4) No action needed	12	7	10	11	16	16	27
5) Retention of rental units	7	8	9	8	9	14	7
Other*	5	4	4	3	1	5	7
Don't know	8	6	4	6	6	9	14

**Most commonly mentioned included: Affordable housing for young families, limit construction, let the free-market decide*

City Services – Resident Normative Comparison*

Similar Cities

Question	City of Miami Beach Rating	Rank	Number of Jurisdictions	City of Miami Beach Percentile	Comparison to Norm	Vs. 2005 Comparison to Norm
Recreation programs and facilities	64	1	5	100%	Above norm	No change
Enforcement of codes and ordinances	61	2	16	94%	Above norm	NA
Street lighting	54	2	7	86%	Above norm	NA
Storm drainage	40	7	10	40%	Similar to norm	Improved
Garbage/trash collection	63	13	22	45%	Similar to norm	No change

Florida Only

Enforcement of codes and ordinances	61	2	24	96%	Above norm	NA
Street lighting	54	5	18	78%	Above norm	NA
Storm drainage	40	14	21	38%	Below norm	Declined
Garbage/trash collection	63	20	24	21%	Below norm	Declined

*Comparative citizen opinions came from the National Research Center, Inc. database of citizen survey results

City Services – Resident Normative Comparison*

Population bet. 70,000 to 100,000 Norms

Question	City of Miami Beach Rating	Rank	Number of Jurisdictions	City of Miami Beach Percentile	Comparison to Norm	Vs. 2005 Comparison to Norm
Recreation programs and facilities	64	1	5	100%	Above norm	NA
Enforcement of codes and ordinances	61	3	20	90%	Above norm	NA
Street lighting	54	8	18	61%	Above norm	NA
Storm drainage	40	15	21	33%	Below norm	Declined
Condition of sidewalks	46	3	5	60%	Below norm	NA
Garbage/trash collection	63	18	24	29%	Below norm	Declined

*Comparative citizen opinions came from the National Research Center, Inc. database of citizen survey results

City Services – Resident Normative Comparison*

All Jurisdictions

Question	City of Miami Beach Rating	Rank	Number of Jurisdictions	City of Miami Beach Percentile	Comparison to Norm	Vs. 2005 Comparison to Norm
Beaches	62	4	11	73%	Above norm	No change
Playground appearance	65	6	19	74%	Above norm	No change
Parks maintenance	64	5	15	73%	Above norm	Improved
Recreation programs and facilities	64	14	34	62%	Above norm	Improved
Enforcement of codes and ordinances	61	32	199	84%	Above norm	NA
Appearance and maintenance of public buildings	64	12	19	42%	Similar to norm	No change
Landscape maintenance	64	5	9	56%	Similar to norm	No change
Building code enforcement	51	20	33	42%	Similar to norm	No change
Street lighting	54	87	183	53%	Similar to norm	NA
Storm drainage	40	153	185	18%	Below norm	No change
Condition of sidewalks	46	18	29	41%	Below norm	Declined
Garbage/trash collection	63	176	231	24%	Below norm	Declined

*Comparative citizen opinions came from the National Research Center, Inc. database of citizen survey results

City Services – In Sum (cont'd)

- 84% of residents and 86% of businesses are favorable about recent CIPs (similar to 2005 scores for residents; businesses improving)
 - North Beach residents the only group below 80% favorable (78% and down 6 points from 2005)
- Generally, services centered around maintenance, appearance and landscaping (buildings, playgrounds, rights of way, parks) continue to be the highest rated
- Moreover, well over $\frac{3}{4}$ of residents and businesses rate the recreation programs and facilities favorably and remain positive about the quality of beaches
 - North Beach and Mid-Beach residents down 10 points on quality of beaches
- Nearly $\frac{2}{3}$ say that the City is doing the right amount to be dog-friendly
 - South Beach residents slightly less favorable but not a significant concern overall
 - In all regions, almost equal number of residents say the City does too much compared to too little
- Code enforcement more moderately favorable, both building and fairness/consistency of enforcement of codes & ordinances

City Services – In Sum

- Cleanliness and infrastructure attributes more mixed
 - The good news:
 - Improvement from 2005 for cleanliness of streets in neighborhoods and of canals/waterways
 - ¾ of residents and 2/3 of businesses (the latter a big improvement) rate garbage/trash collection favorably (South Pointe residents least positive) though results still below norm
 - Condo Corridor & Mid-Beach residents show greatest increase in cleanliness ratings
 - Good results on street lighting (62% favorable) - more of an issue in North Beach
 - The not-so-good news:
 - Storm drainage and condition of sidewalks (cracks) declined a few points from 2005 (now slightly less than half favorable on both) and below norm
 - No significant change in views of how the City is addressing homelessness (a broad quality of life issue)
 - Litter/trash cited as the main cleanliness issue along business/commercial streets, in addition to, construction debris, alleyways and trees/branches

City Services – In Sum (cont'd)

- Large majority of residents continue to report that noise is not a major disturbance, although, as in 2005, South Beach and South Pointe regions slightly less favorable
 - As reported by businesses, the main reasons include Traffic, Construction (especially in North Beach) and Car Horns/Motorcycles
- Development across Miami Beach remains a significant issue for both residents and businesses
 - Concerns over the pace of new construction are growing among residents and businesses, as more this year (compared to 2005) say that there is too much of it across the City
 - Residents feel that traffic/congestion is by far the most important impact of construction
- Despite the increasing concerns over development, around 2/3 of residents and businesses feel that the City is doing enough to preserve historic areas
 - Businesses views improving across all regions
 - Maintaining the character of neighborhoods and maintaining historic structures both quite important to residents with respect to historic preservation
- When it comes to housing, residents feel the City should most seek to ensure housing for households with income of less than \$50,000
 - Mid-Beach/Condo Corridor and South Beach residents feel that providing housing for elderly/seniors should be the main priority

***Results by Survey Category –
Getting Around the City***

Getting Around the City

What is your primary mode of transportation in Miami Beach?



* 2005 Results – Car = 56%; Public buses = 28%; Walking/Bicycling = 13%; Motorcycles/Mopeds = 2%; Stay home = 1%

Getting Around the City

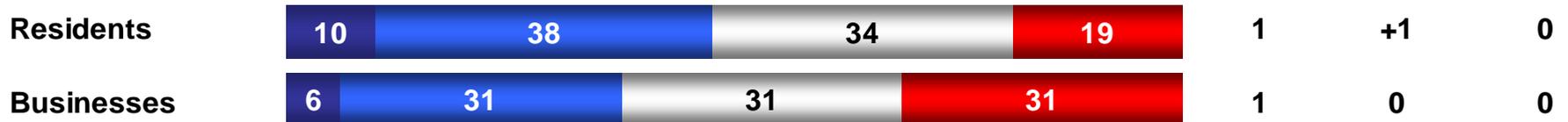
% Excellent
 % Good
 % Fair
 % Poor

% Don't Know vs. 2005 (% Fav) vs. 2005 (% Excellent)

How do you feel about traffic flow where you drive in Miami Beach?

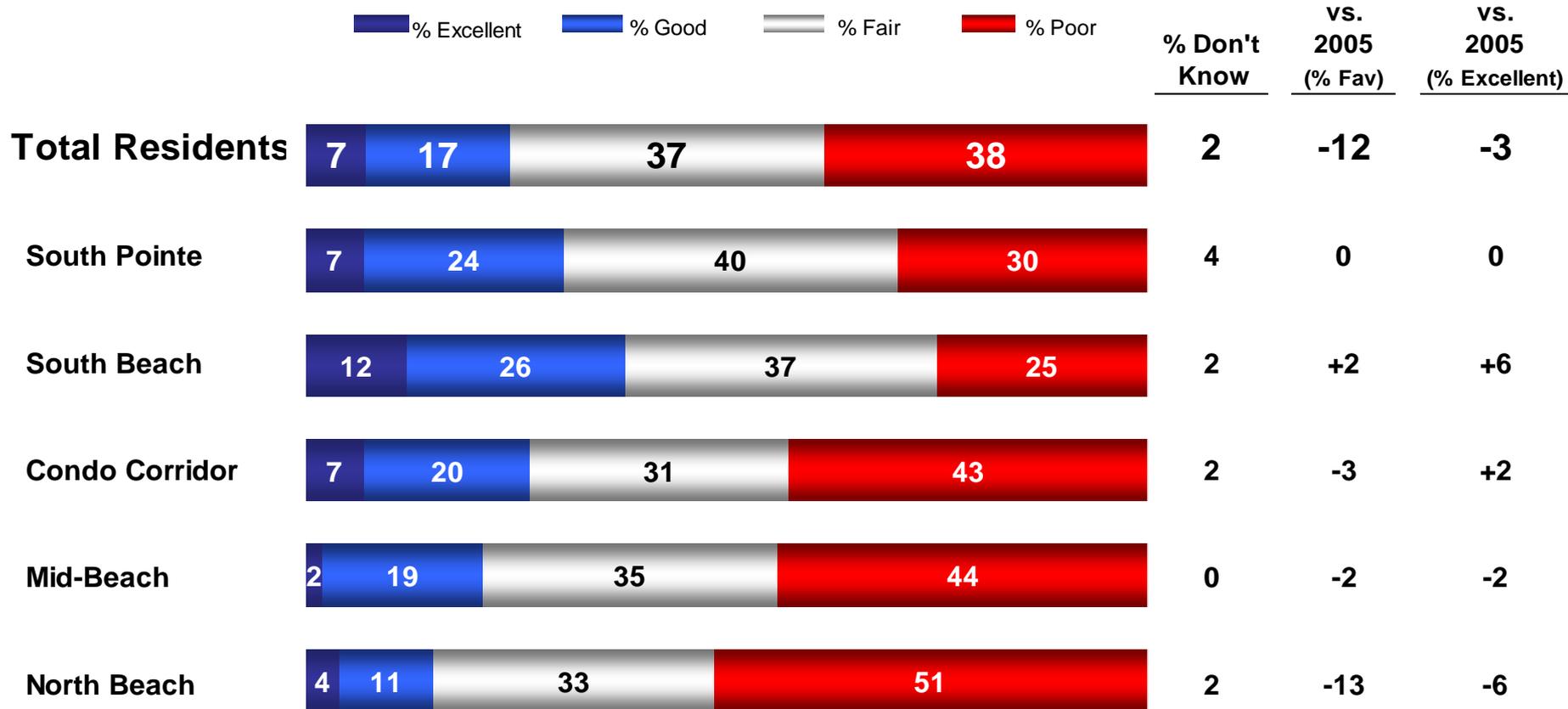


How do you feel about the condition of roads in Miami Beach?



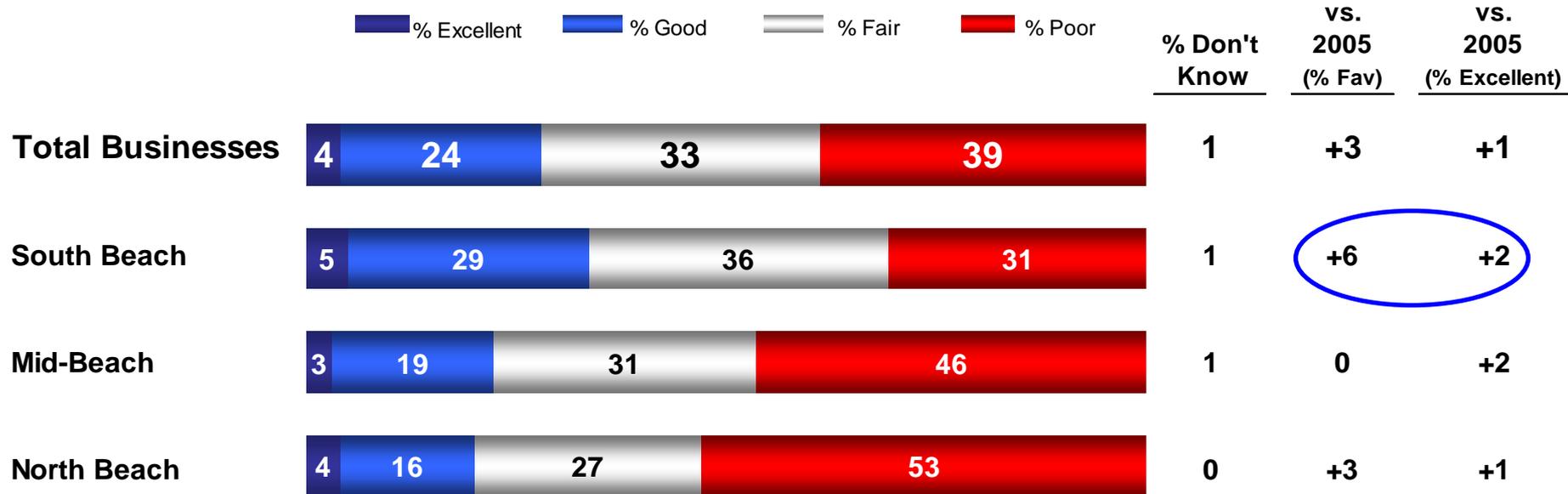
Traffic Flow – Residents

How do you feel about traffic flow in Miami Beach?



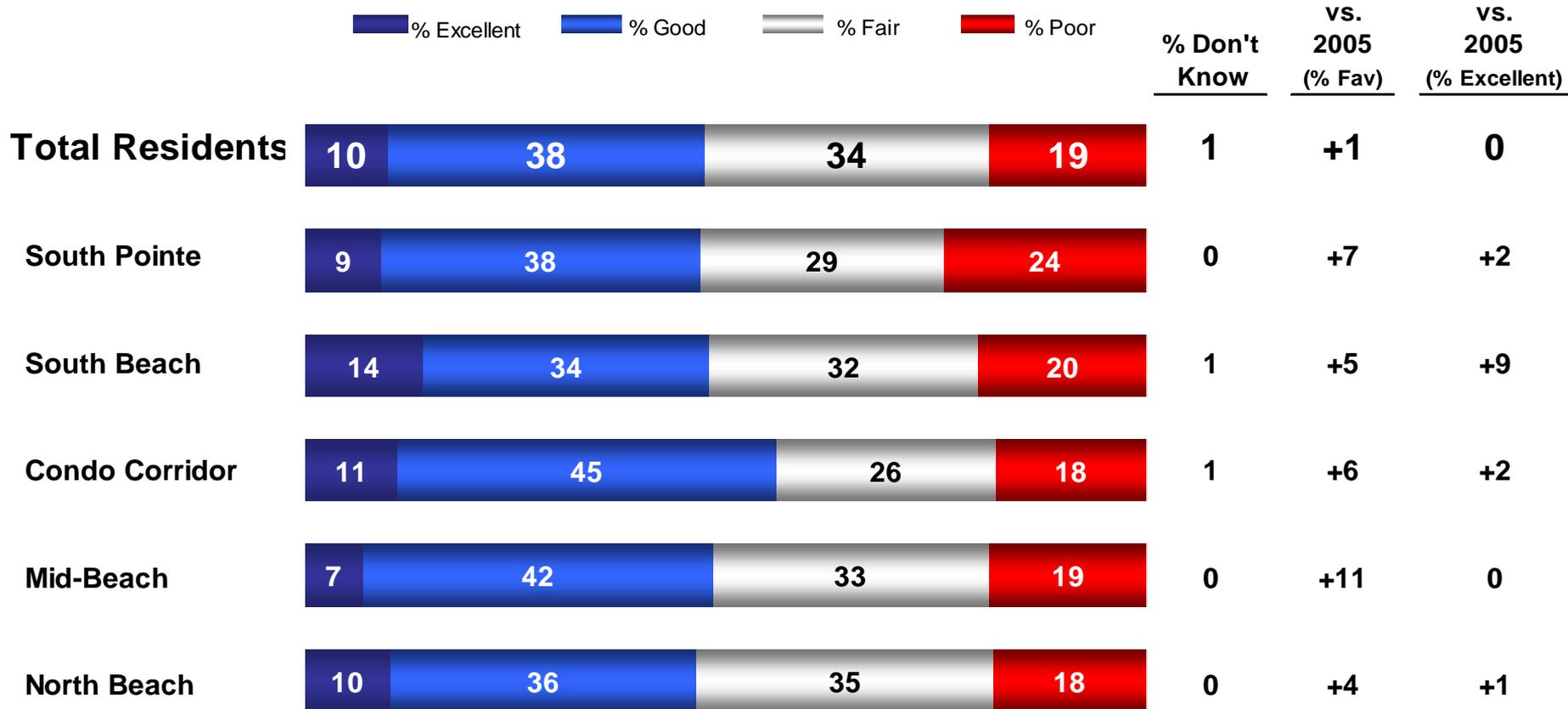
Traffic Flow – Businesses

How do you feel about traffic flow in Miami Beach for customers and employees trying to get to and from your place of business?



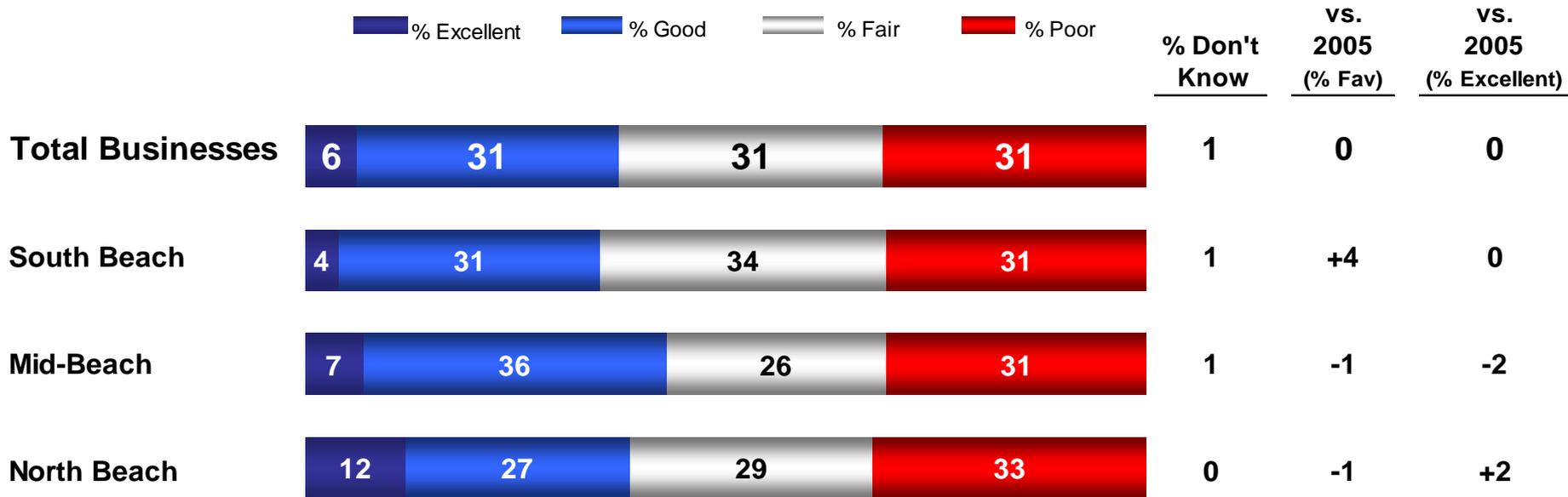
Road Condition – Residents

How do you feel about the condition of roads in Miami Beach?



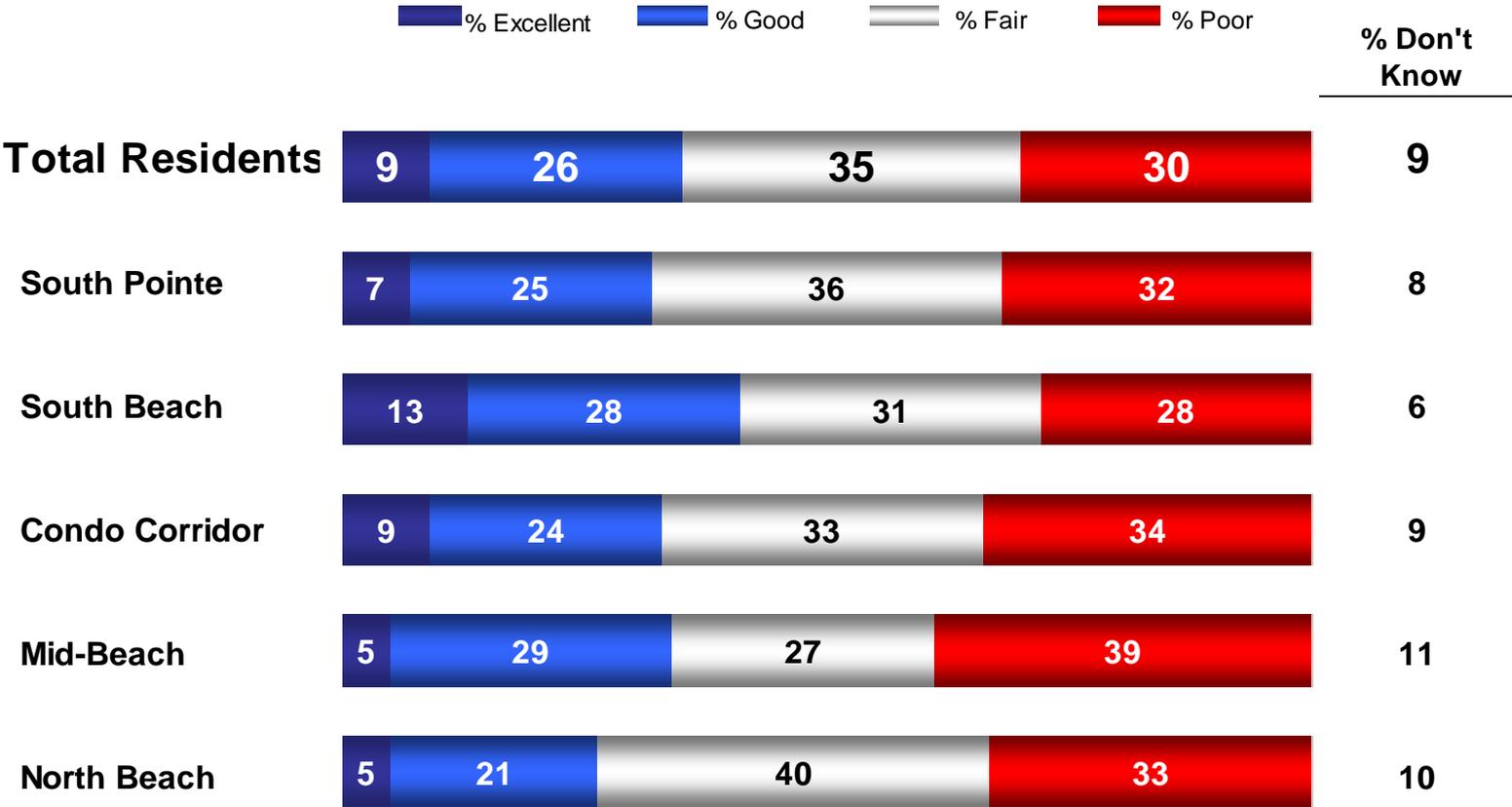
Road Condition – Businesses

How do you feel about the condition of roads in Miami Beach?



Pedestrian Trails – Residents

Rate the availability of pedestrian trails and bicycle paths/lanes throughout the City of Miami Beach.



Getting Around the City – Resident Normative Comparison*

Similar Cities

Question	City of Miami Beach Rating	Rank	Number of Jurisdictions	Miami Beach Percentile	Comparison to Norm	Vs. 2005 Comparison to Norm
Road conditions	46	3	9	78%	Above norm	No change

Florida Only

Road conditions	46	3	7	71%	Similar to norm	No change
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Population bet. 70,000 to 100,000 Norms

Traffic flow	31	7	10	40%	Similar to norm	Declined
Road conditions	46	6	14	64%	Above norm	Improved
Trails and bicycle paths	38	6	7	29%	Below norm	NA

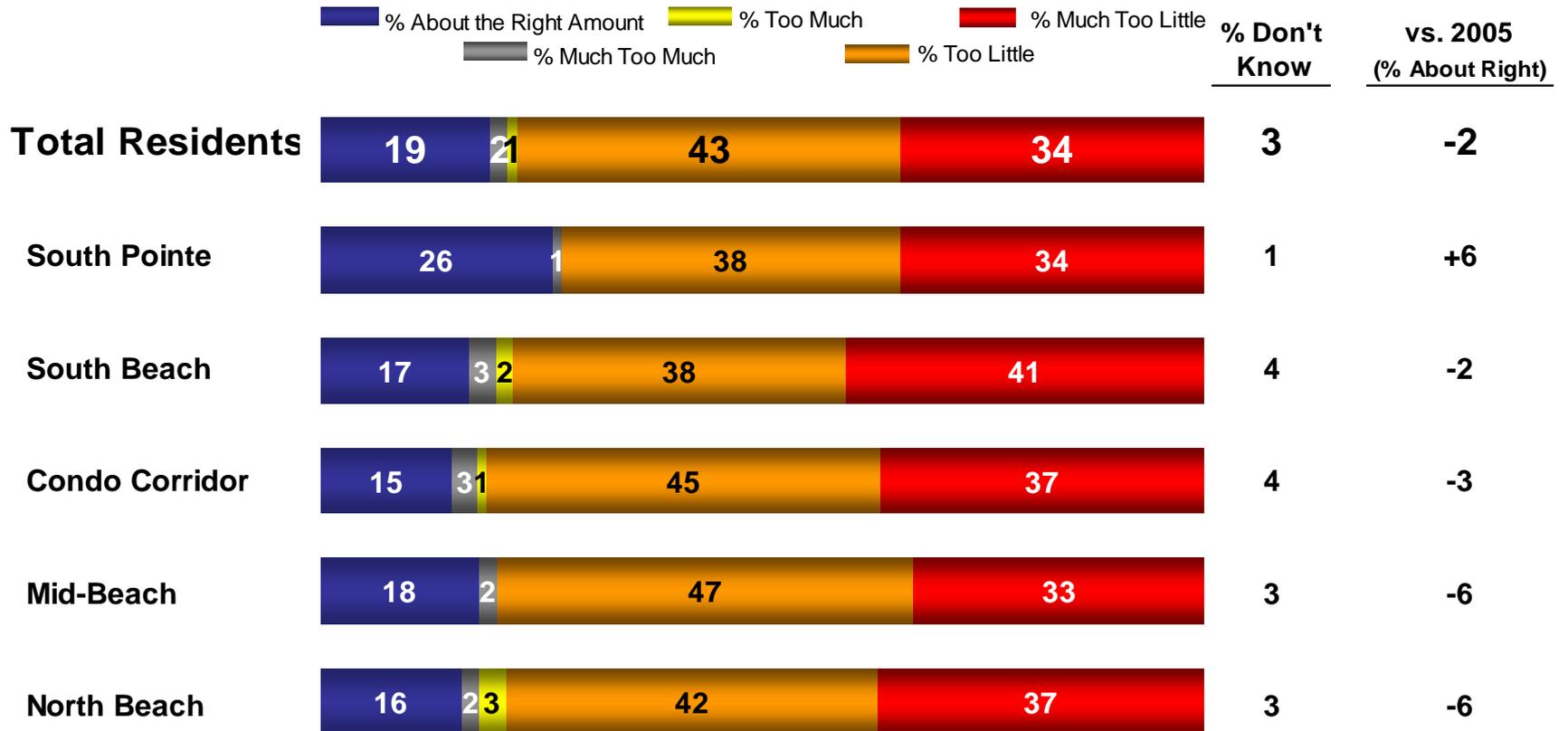
All Jurisdictions

Traffic flow	31	63	72	14%	Below norm	Declined
Road conditions	46	40	87	55%	Above norm	Improved
Trails and bicycle paths	38	36	39	10%	Below norm	NA

*Comparative citizen opinions came from the National Research Center, Inc. database of citizen survey results

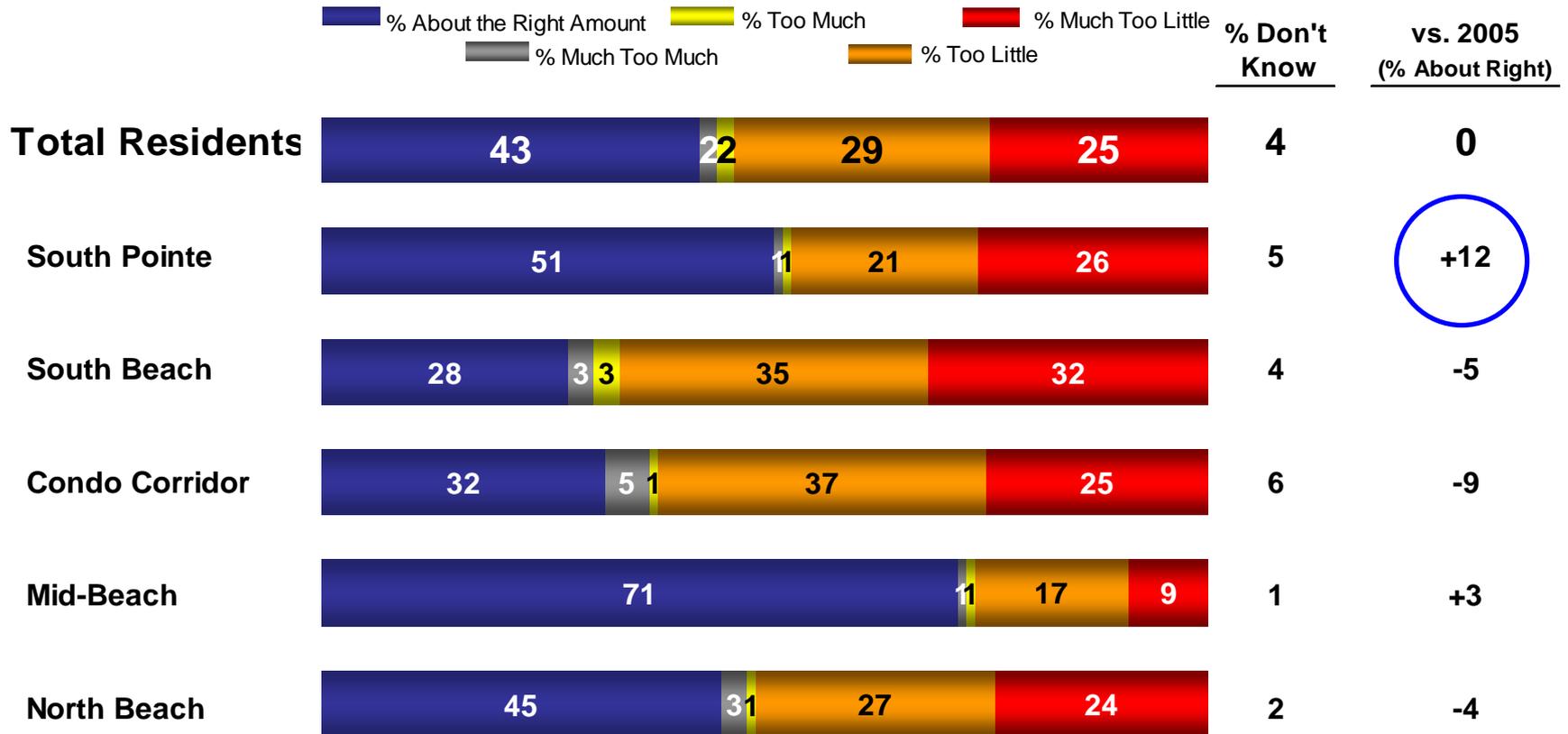
Parking – Residents

How do you feel about the availability of parking across the City of Miami Beach?



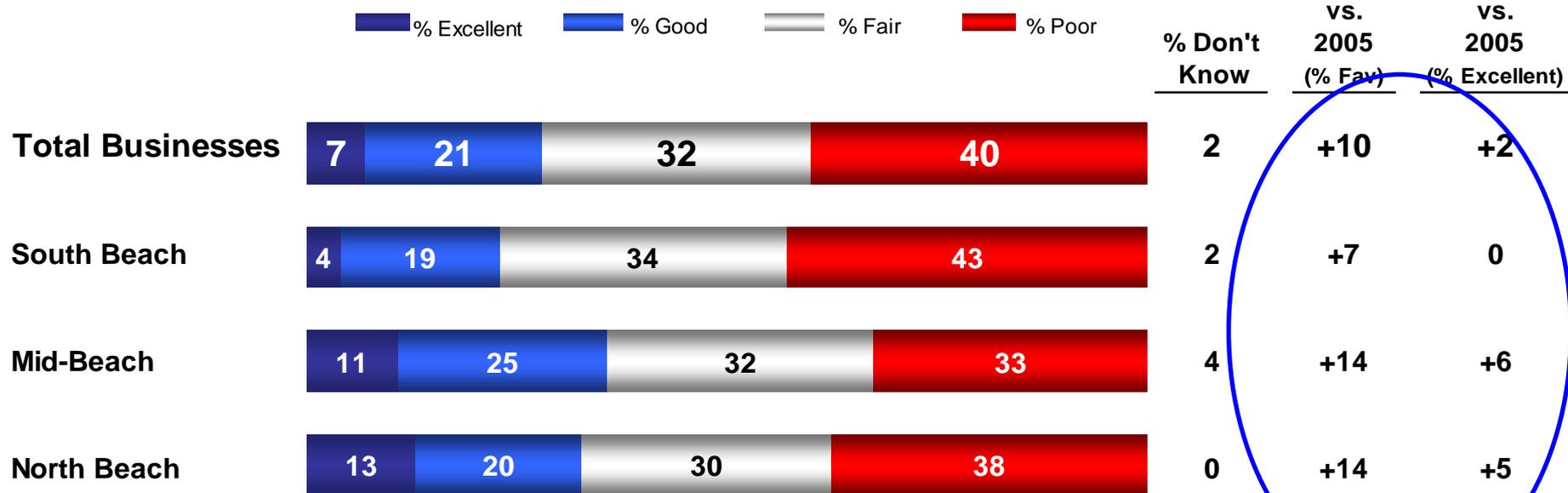
Parking – Residents

How do you feel about the availability of parking in your neighborhood?



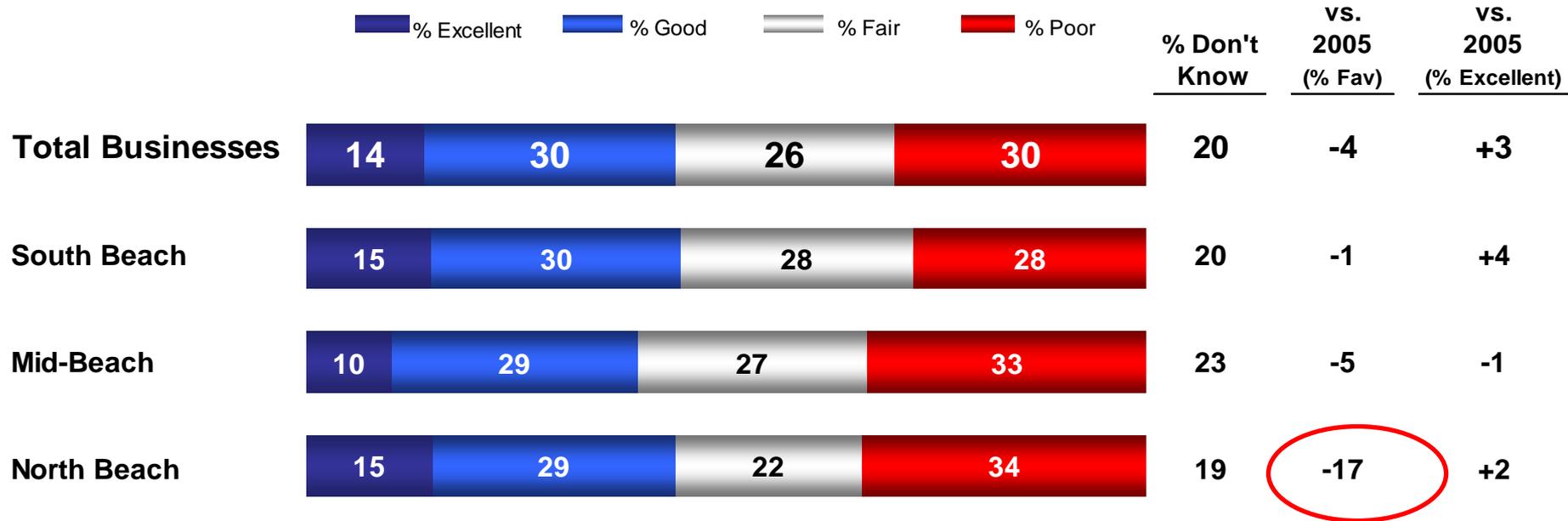
Parking – Businesses

How satisfactory is the availability of parking (both public and private) for your customers and/or employees around your business area?



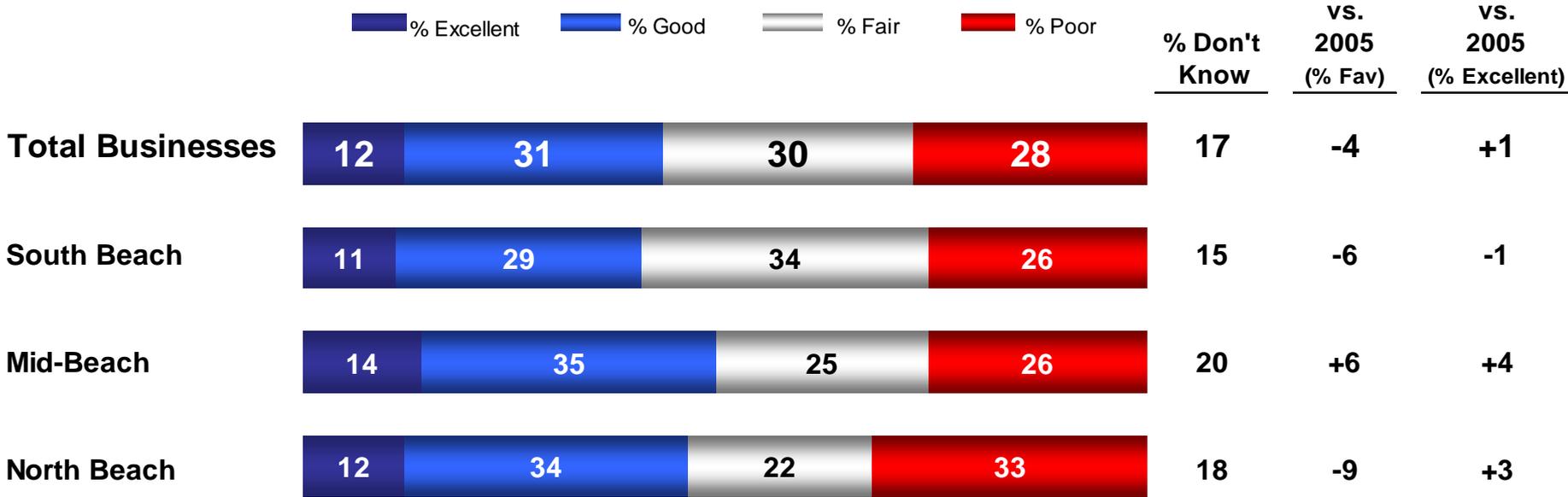
Public Transportation – Businesses

Rate the effectiveness of the public transit system to bring customers to your business.



Public Transportation - Businesses

Rate the effectiveness of the public transit system to bring employees to your business.



Getting Around the City – In Sum

- Transportation remains one of the most significant areas to address from the survey results (often mentioned as a key quality of life issue) but some progress being made!
- Unfavorable ratings continue regarding the condition of roads, available pedestrian/bike paths and especially traffic flow
 - Residents' ratings down 12 points on traffic flow although it is an issue in similar cities
 - North Beach and Mid-Beach Residents most critical of traffic flow – also consistent with their concerns over the impact of development on traffic
 - Still mixed to unfavorable about condition of roads (businesses especially) but improvement in resident ratings and now more often above normative comparisons
 - Significant number rate the availability of pedestrian/bike paths poorly (slightly more positive in South Beach but still an issue everywhere) – results below norm as well
- While most say there continues to be insufficient parking across the City and in their neighborhoods (though the latter more favorable), good improvement in this area across regions from the perspective of both residents and businesses
 - As in 2005, Mid-Beach residents much less concerned about parking in their neighborhood
- Public transit system's ability to get employees/customers across the City again rated poorly by Businesses, particularly those in North Beach, where results are lower than 2005

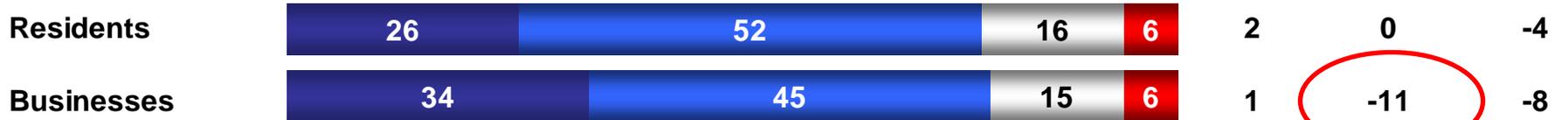
*Results by Survey Category –
Safety*

Rating of Safety Services

% Excellent
 % Good
 % Fair
 % Poor

% Don't Know vs. 2005 (% Fav) vs. 2005 (% Excellent)

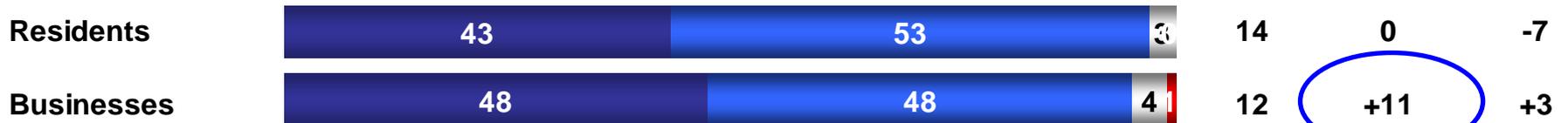
Overall quality of City police



Overall quality of City emergency medical response



Overall quality of City fire

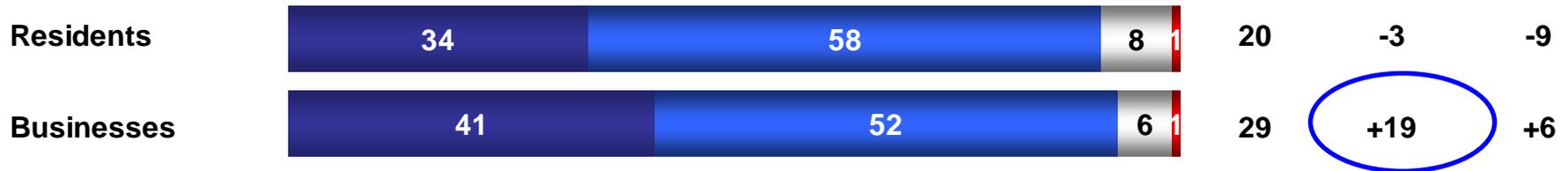


Rating of Safety Services (cont'd)

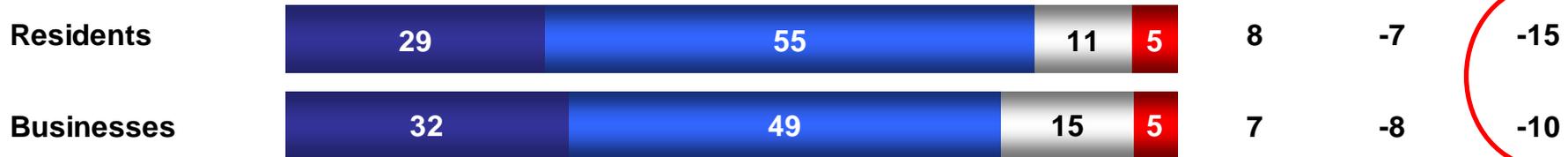
% Excellent
 % Good
 % Fair
 % Poor

% Don't Know vs. 2005 (% Fav) vs. 2005 (% Excellent)

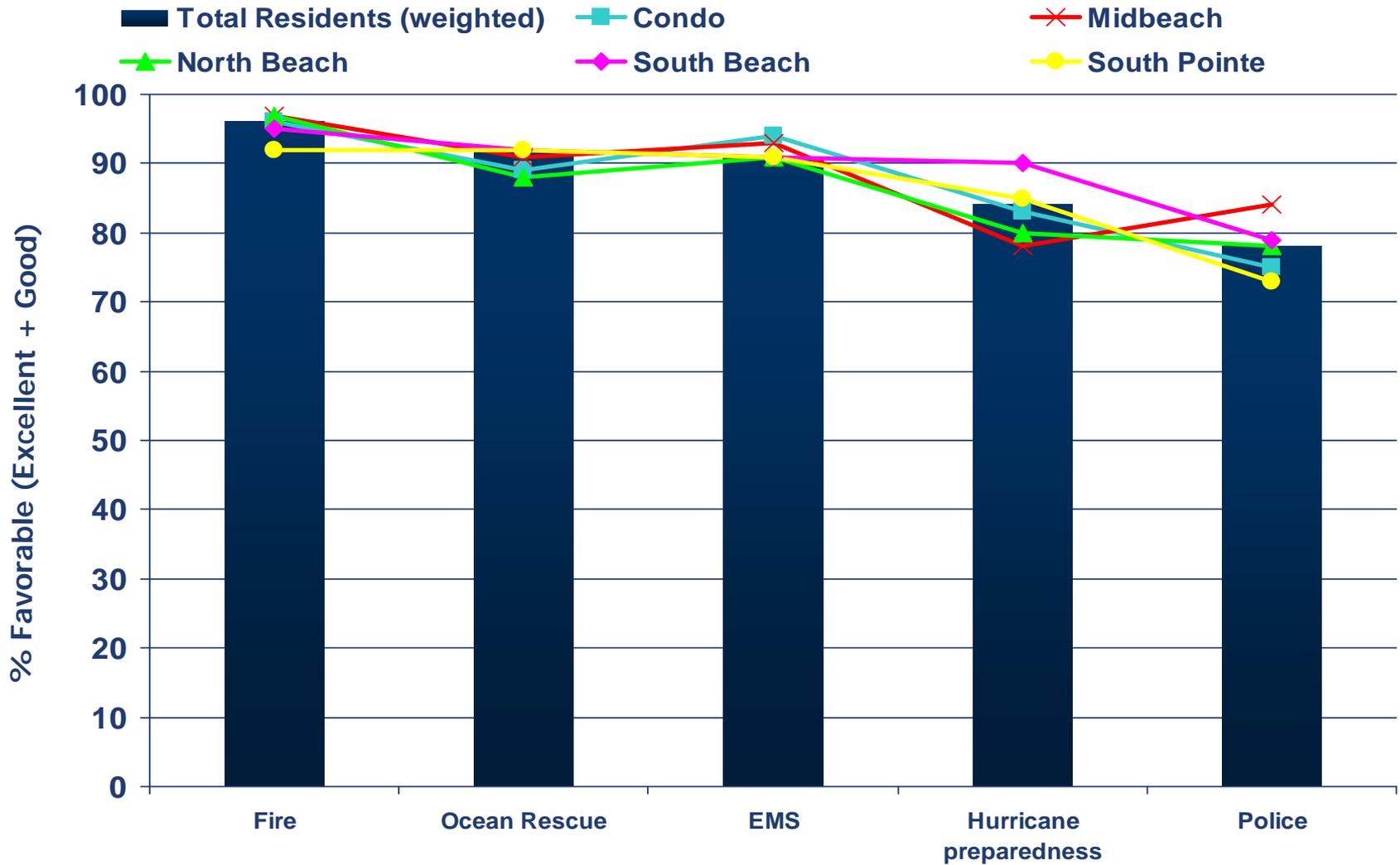
Overall quality of City ocean rescue/lifeguard/beach patrol



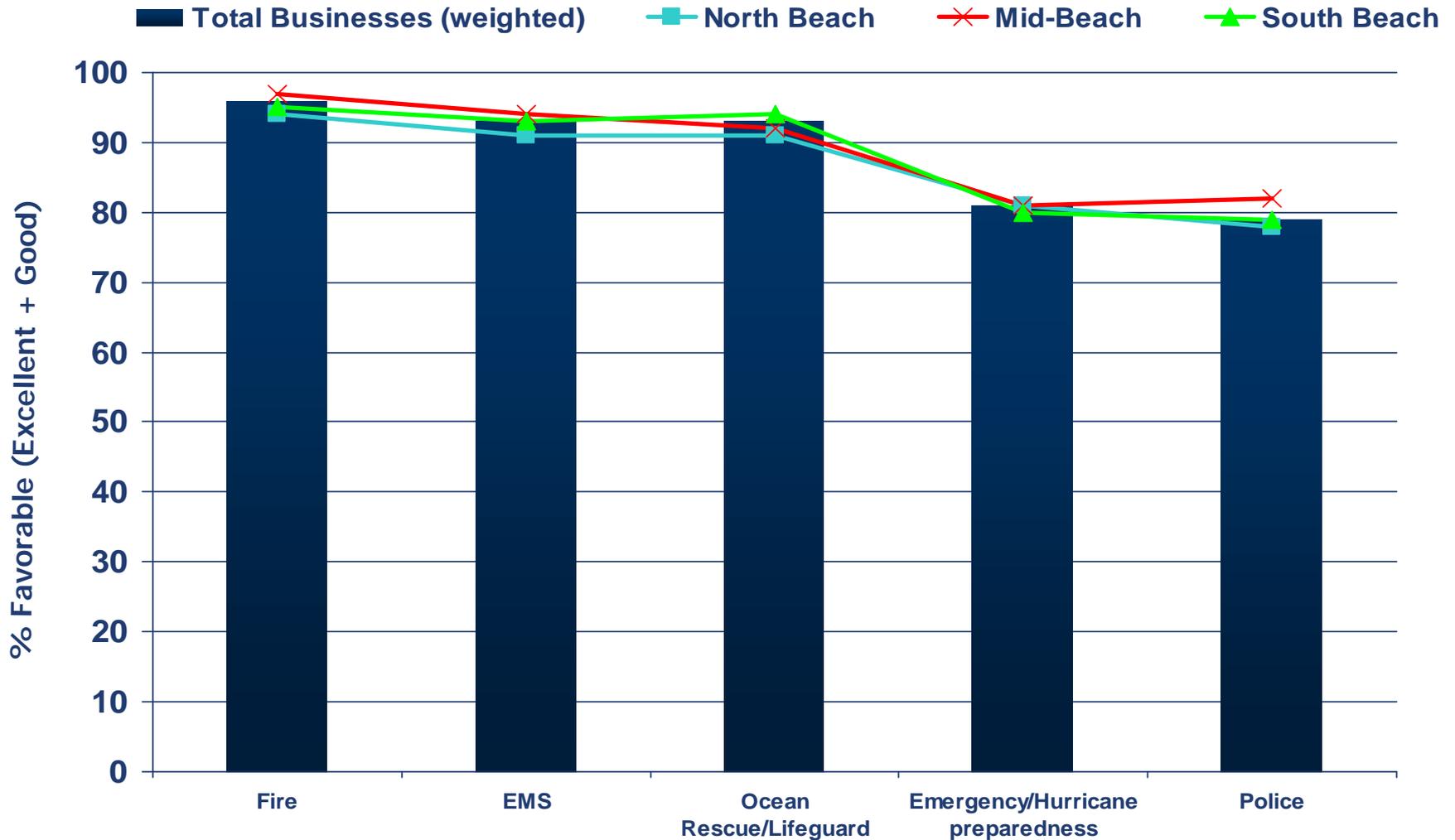
Overall quality of City emergency/hurricane preparedness



Rating of Safety Services – Residents by Region

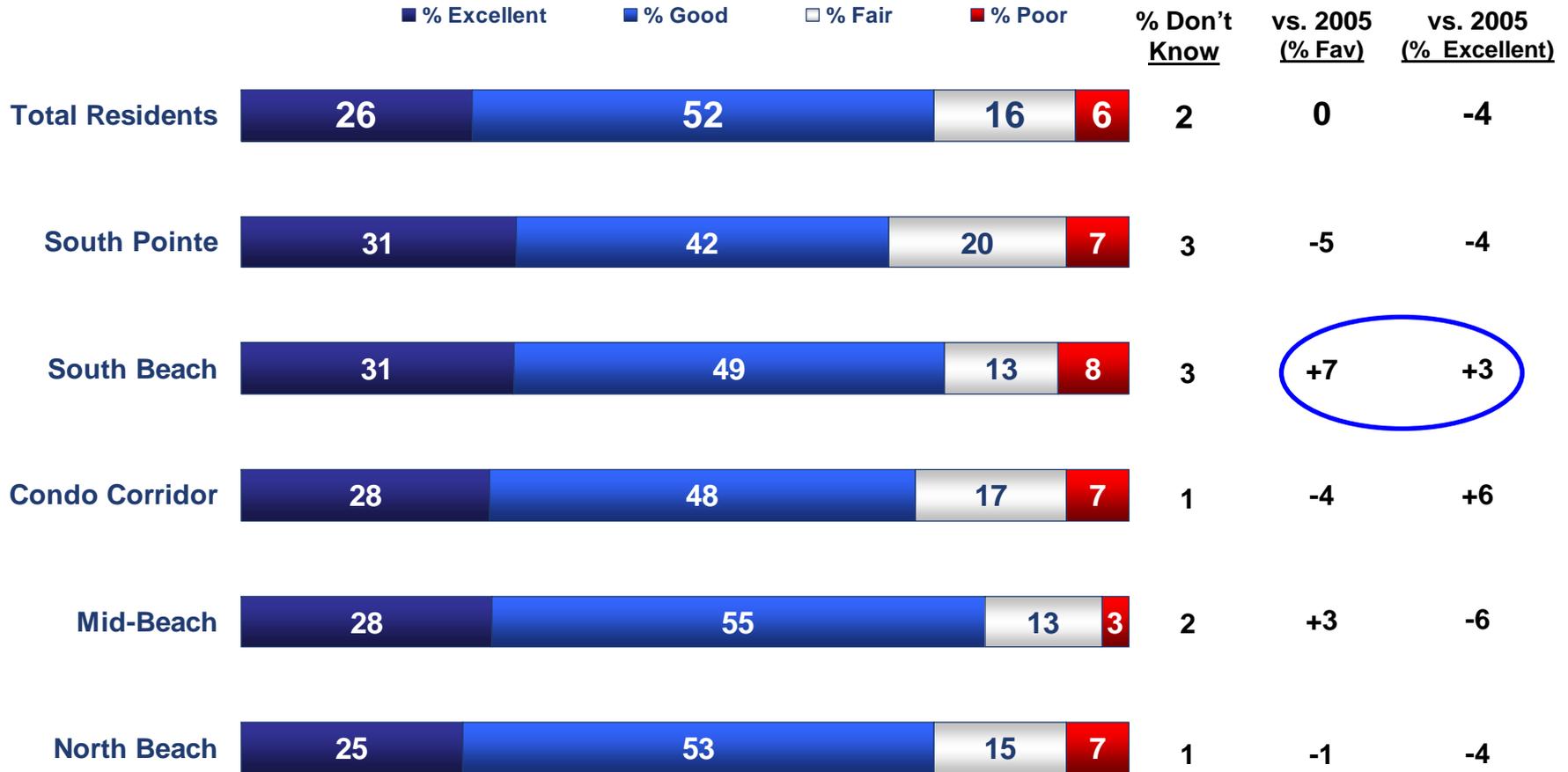


Rating of Safety Services – Businesses by Region



Rating of Police – Residents By Region

Rate the quality of services provided by City Police



Rating of Police – Businesses By Region

Rate the quality of services provided by City Police

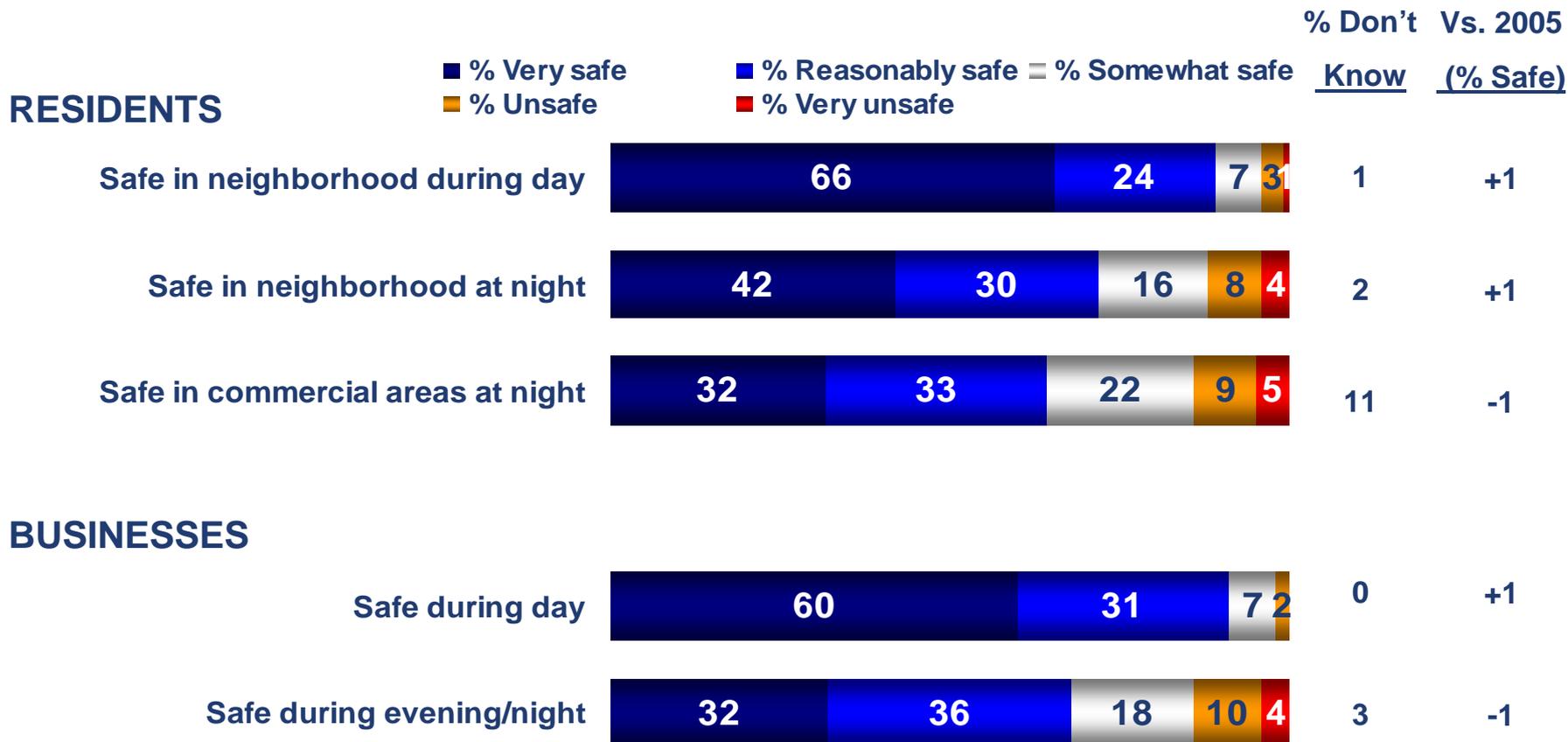


Rating of Emergency/Hurricane Preparedness – Residents By Region

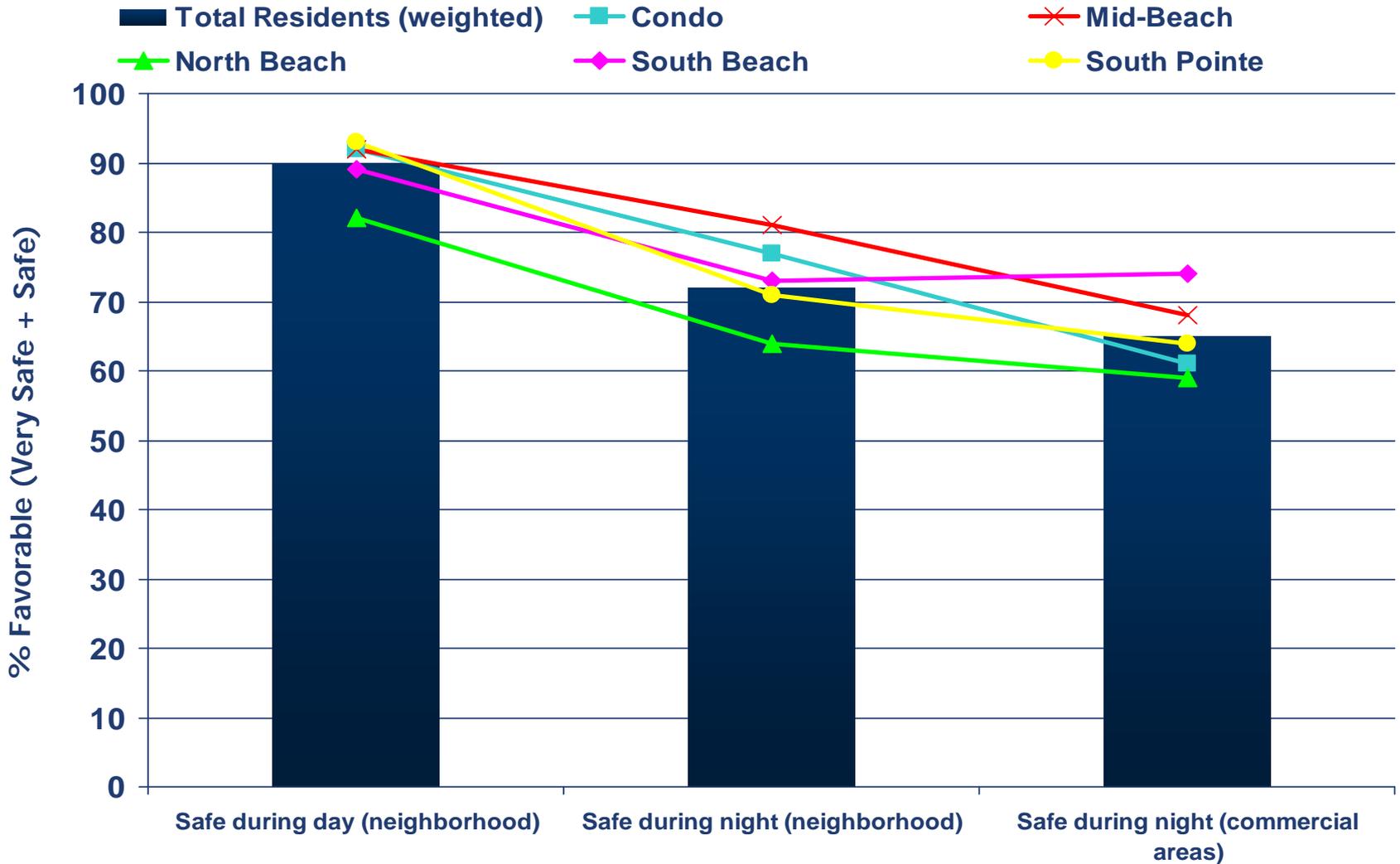
Rate the quality of City emergency/hurricane preparedness



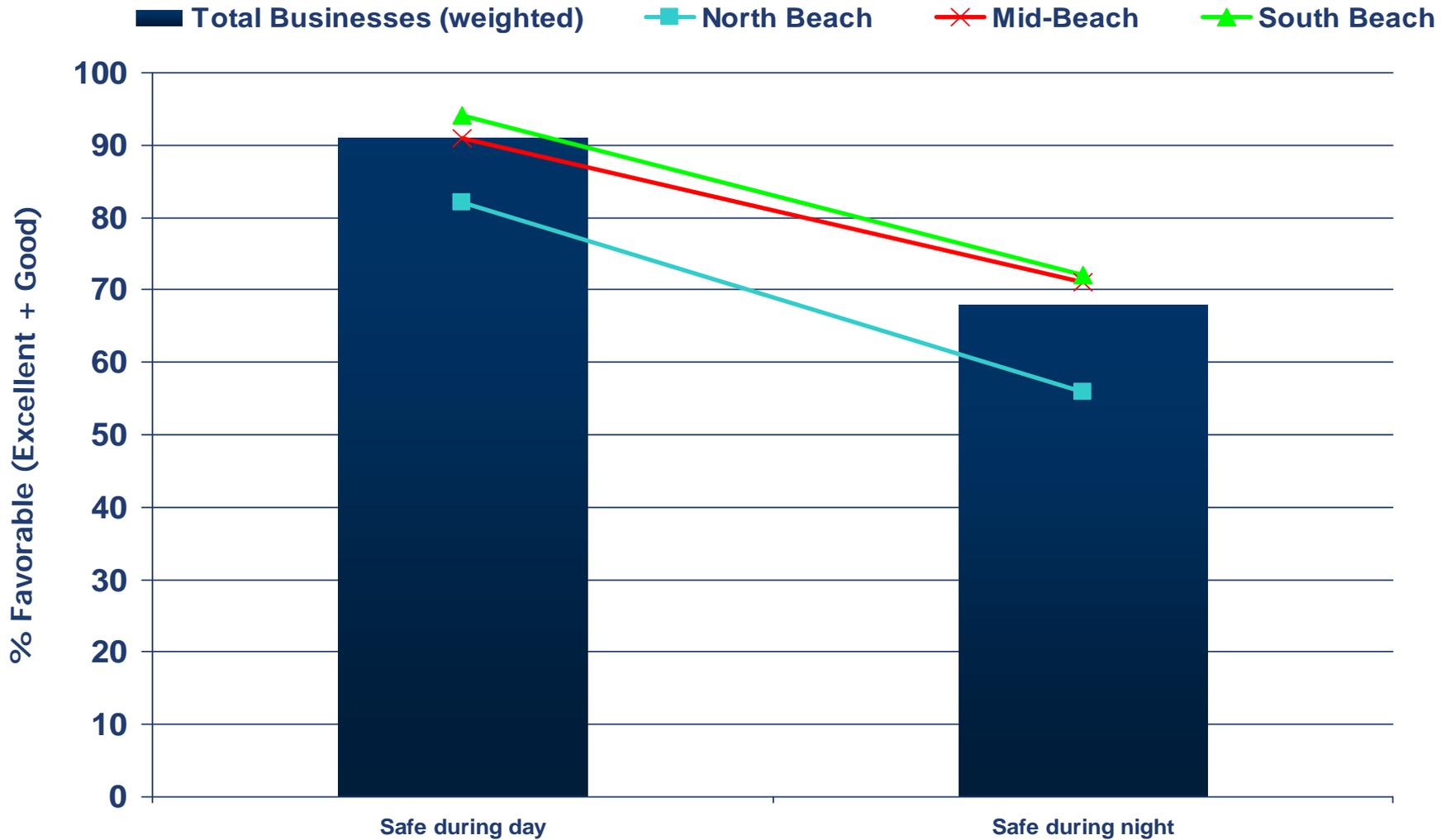
Safety During the Day/Night



Safety During the Day/Night – Residents by Region



Rating of Safety Services – Businesses by Region



Safety – Resident Normative Comparison*

Similar Cities

Question	City of Miami Beach Rating	Rank	Number of Jurisdictions	City of Miami Beach Percentile	Comparison to Norm	Vs. 2005 Comparison to Norm
Police services	66	6	33	85%	Above norm	No change
EMS	77	3	17	88%	Above norm	No change
Fire services	80	3	26	92%	Above norm	No change
Safety in neighborhood during the day	87	1	11	100%	Above norm	No change
Safety in neighborhood during the night	74	6	16	69%	Above norm	No change
Safety in business areas during the night	69	3	12	83%	Above norm	No change

Florida Only

Police services	66	10	34	74%	Above norm	Improved
EMS	77	6	23	78%	Above norm	No change
Fire services	80	5	28	86%	Above norm	No change
Safety in neighborhood during the day	87	2	19	95%	Above norm	No change
Safety in neighborhood during the night	74	6	22	77%	Above norm	No change
Safety in business areas during the night	69	2	20	95%	Above norm	No change

*Comparative citizen opinions came from the National Research Center, Inc. database of citizen survey results

Safety – Resident Normative Comparison*

Population bet. 70,000 to 100,000 Norms

Question	City of Miami Beach Rating	Rank	Number of Jurisdictions	City of Miami Beach Percentile	Comparison to Norm	Vs. 2005 Comparison to Norm
Police services	66	14	35	63%	Above norm	Improved
EMS	77	4	17	82%	Above norm	No change
Fire services	80	4	25	88%	Above norm	No change
Safety in neighborhood during the day	87	6	18	72%	Above norm	No change
Safety in neighborhood during the night	74	8	21	67%	Above norm	No change
Safety in business areas during the night	69	3	16	88%	Above norm	No change

*Comparative citizen opinions came from the National Research Center, Inc. database of citizen survey results

Safety – Resident Normative Comparison*

All Jurisdictions

Question	City of Miami Beach Rating	Rank	Number of Jurisdictions	City of Miami Beach Percentile	Comparison to Norm	Vs. 2005 Comparison to Norm
Police services	66	123	315	61%	Above norm	Improved
EMS	77	44	195	78%	Above norm	No change
Fire services	80	40	240	84%	Above norm	No change
Emergency preparedness	69	2	8	88%	Above norm	No change
Safety in neighborhood during the day	87	53	153	66%	Above norm	No change
Safety in neighborhood during the night	74	64	174	64%	Above norm	No change
Safety in business areas during the night	69	38	144	74%	Above norm	No change

*Comparative citizen opinions came from the National Research Center, Inc. database of citizen survey results

Most Important Safety Areas to Address

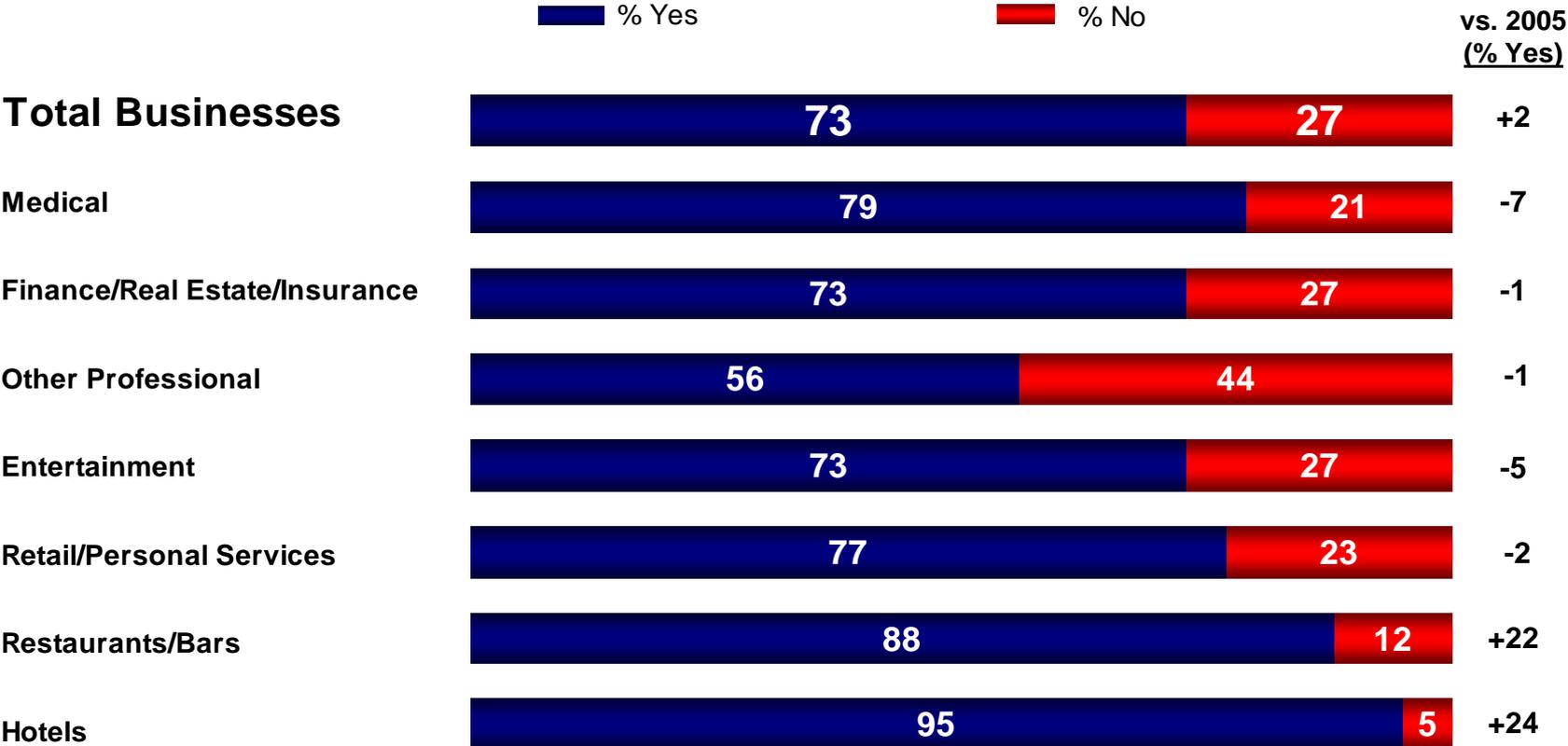
What do you feel are the two most important areas that the City can address with regards to public safety?

<u>2005 Rank</u>	Overall Rank/Option	<u>% Res 1</u>	<u>% Res 2</u>	<u>% Bus 1</u>	<u>% Bus 2</u>
2	1) Police in neighborhoods	20	17	14	15
1	2) Reducing homelessness	19	14	29	17
4	3) Police in commercial areas	7	18	15	22
3	4) Preventing crime	28	9	14	12
NEW	5) Improving infrastructure (repair)	8	17	12	12
5	6) Enforcing traffic laws	9	10	10	8
NEW	7) Cleanliness of streets	5	7	4	8
6	8) Enhancing lifeguard/beach patrol	1	3	1	1
8	9) Improving rescue	1	1	0	1
7	10) Improving fire-fighting	0	1	0	1
	11) Other*	2	2	1	3

***Most commonly mentioned included: The quality of police, street/road conditions**

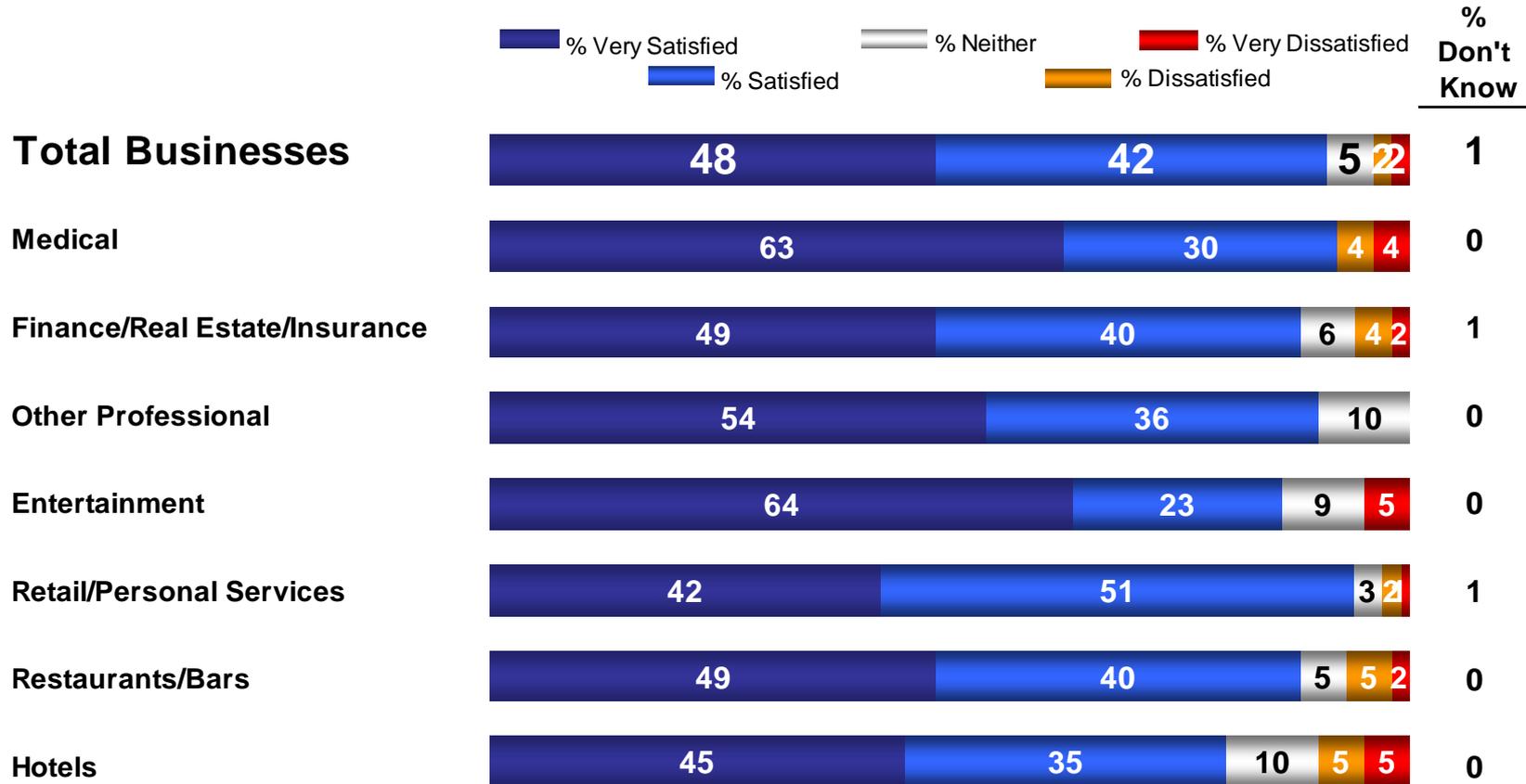
Fire Inspections – Businesses

During the past 12 months, has your business been inspected by the fire department?



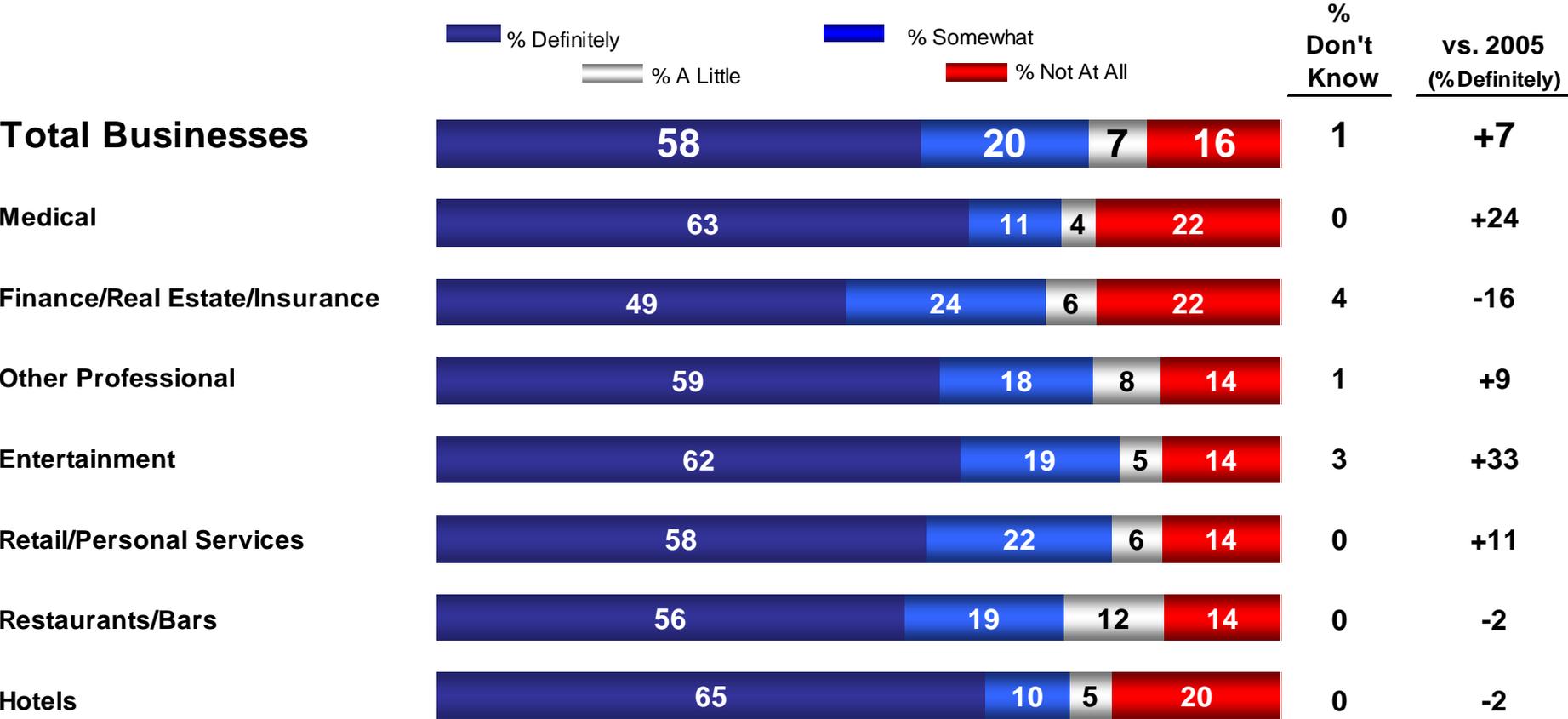
Fire Inspections – Businesses (cont'd)

How satisfied are you with the fairness and consistency of fire inspections in the past 12 months for your establishment?



Fire Inspections – Businesses (cont'd)

Overall, do you feel the inspections have helped improve the fire safety of your establishment?



Safety – In Sum

- Ratings of safety services and the feeling of being safe in the City during the day and even in the night remain positive and higher than all normative comparisons
- Both residents and businesses are most positive about Fire, Ocean Rescue and EMS (significant increase in ratings for businesses on all three items)
- Ratings of Hurricane Preparedness and Police still positive and above norm
 - Hurricane Preparedness ratings, from both residents and businesses, lower than 2005
 - Rating of Police services by businesses down over 10 points from 2005 and is also declining for North Beach and South Pointe residents
- Residents and businesses continue to indicate that they feel most safe during the day – though as is common, feelings of safety decrease at night (90% for day in neighborhoods/business areas vs. 72% for night in neighborhoods / 65% for night in business areas)
 - As in 2005, North Beach residents & businesses express greater ‘safety at night’ concerns
- When asked to indicate the most important safety area to address, most mentioned increasing police visibility across the City and reducing homelessness (similar to 2005)
- About ¾ of businesses say they have been inspected by the fire department (comparable to 2005 but significant increase in reporting of inspections for restaurants/bars and hotels) – 90% are satisfied with the fairness and consistency of inspections, and favorable (78%) about whether it actually helps improve fire safety

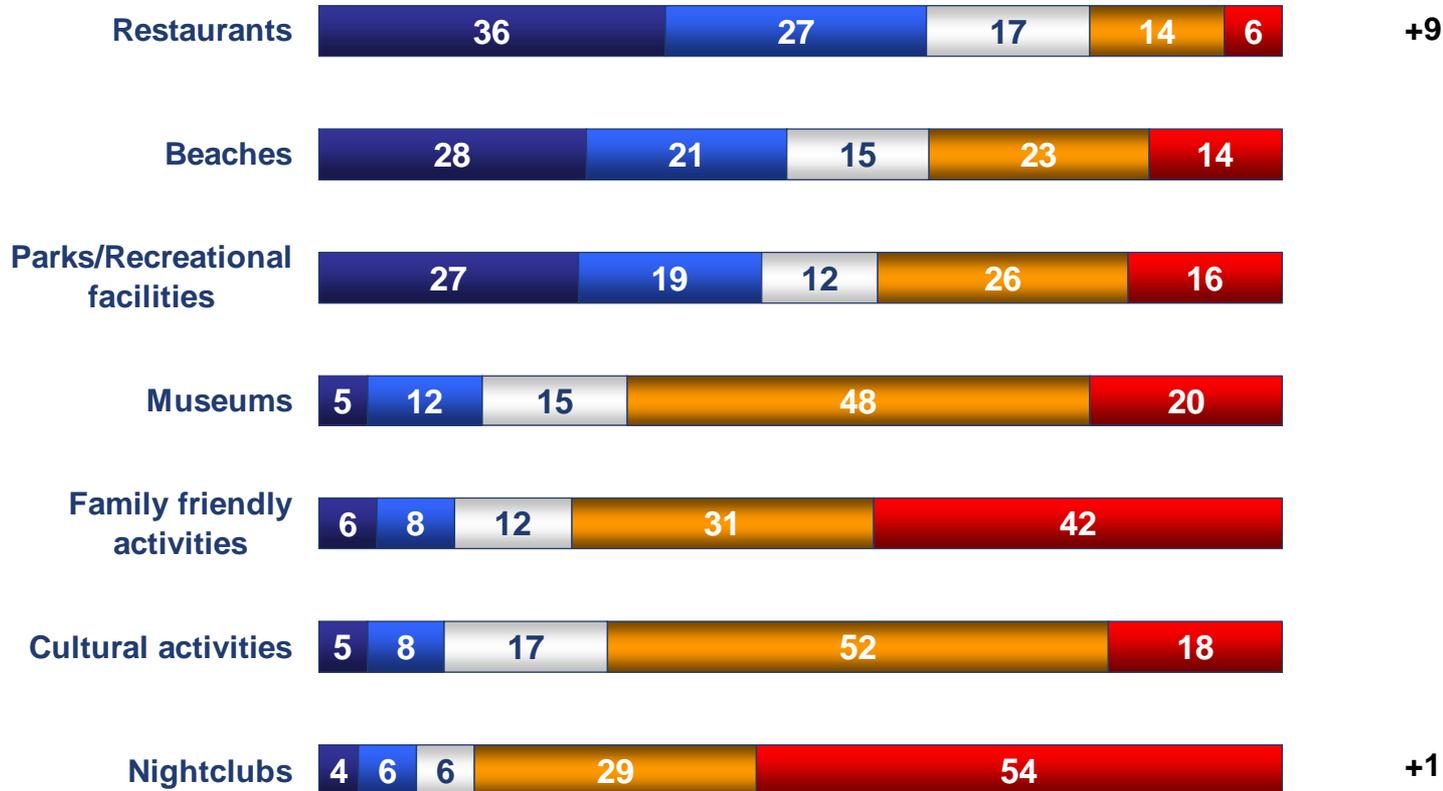
***Results by Survey Category –
Culture, Entertainment & Tourism***

Culture and Entertainment – Residents

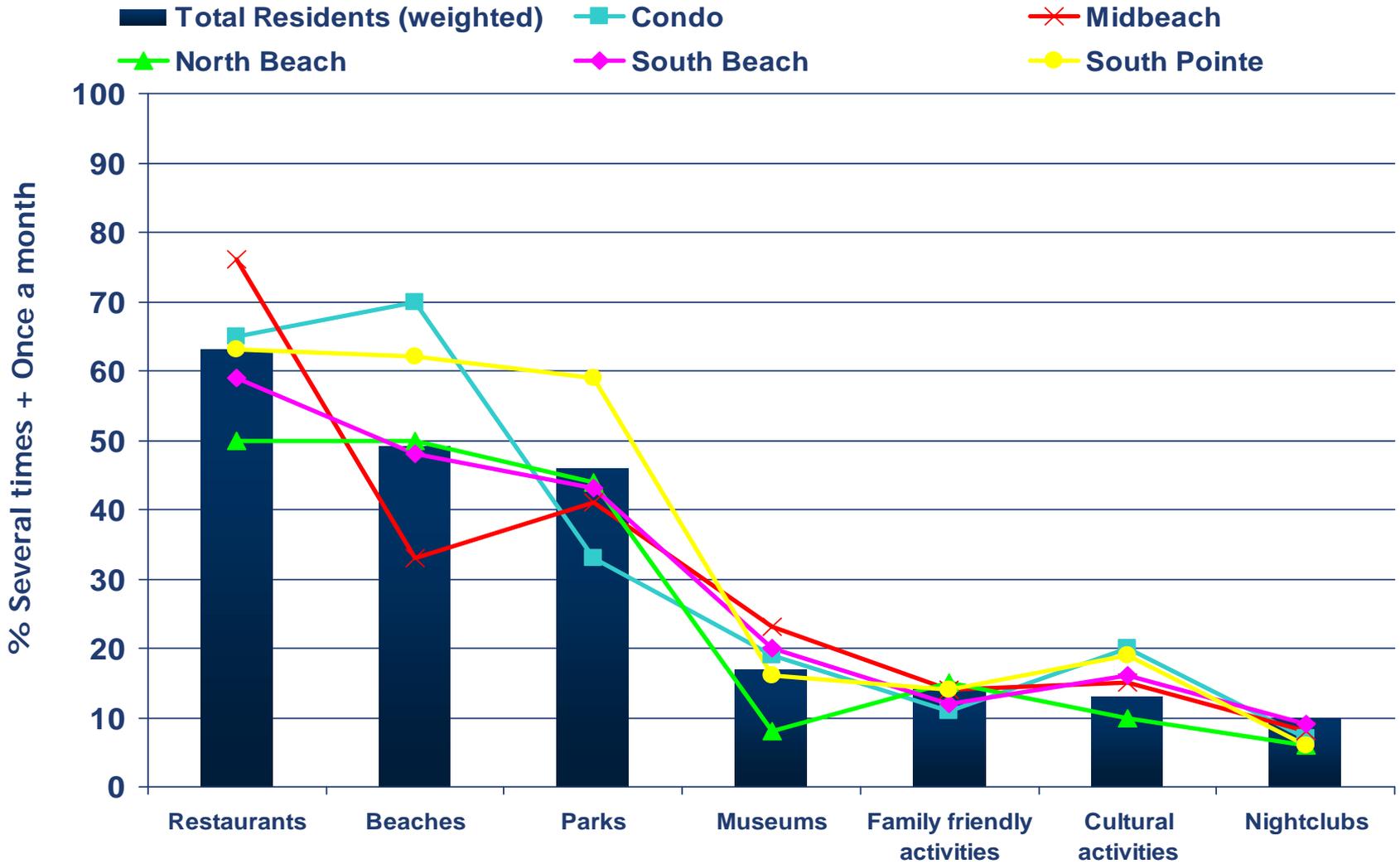
How often do you go to each of the following?

■ % Several times a week ■ % Once a week
■ % Couple times a month ■ % Once a month or less
■ % Don't attend

vs. 2005
(% Several/Once a week)



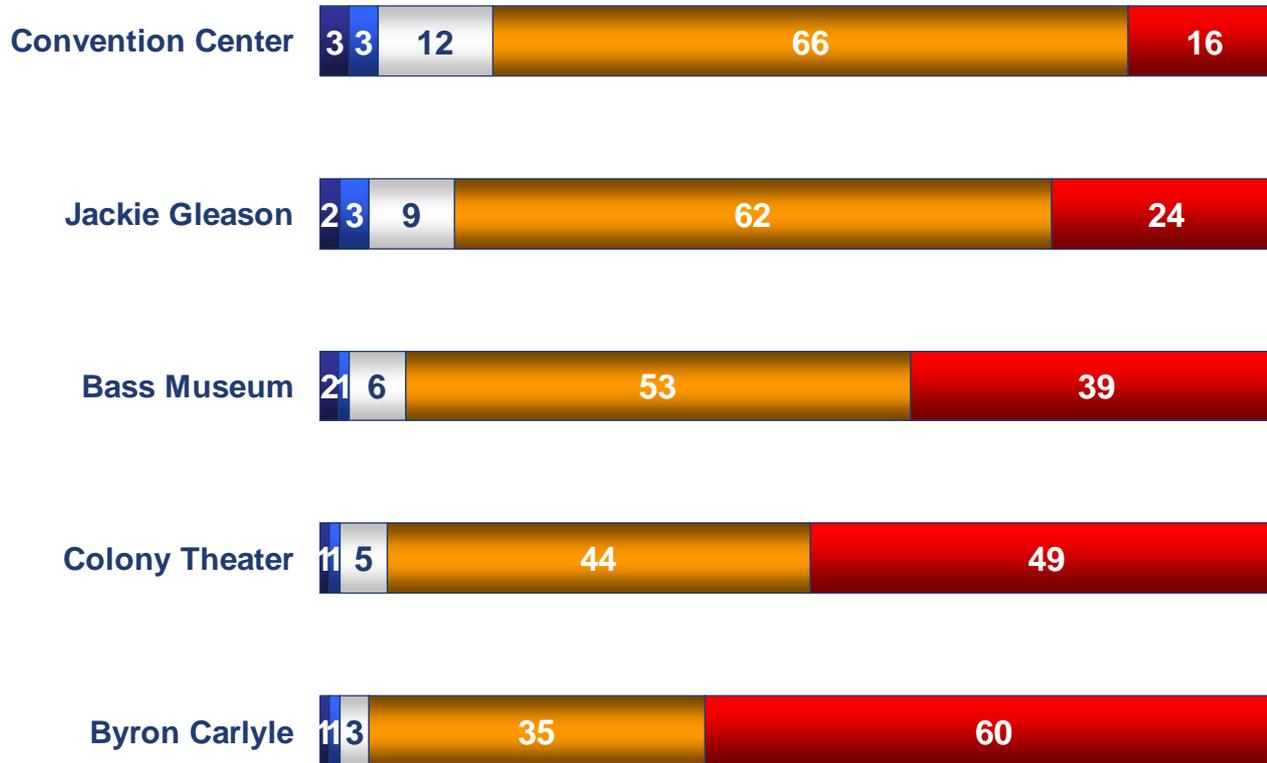
Culture and Entertainment – Residents by Region



Culture and Entertainment – Residents

How often do you go to each of the following?

- % Several times a week
- % Once a week
- % Couple times a month
- % Once a month or less
- % Don't attend

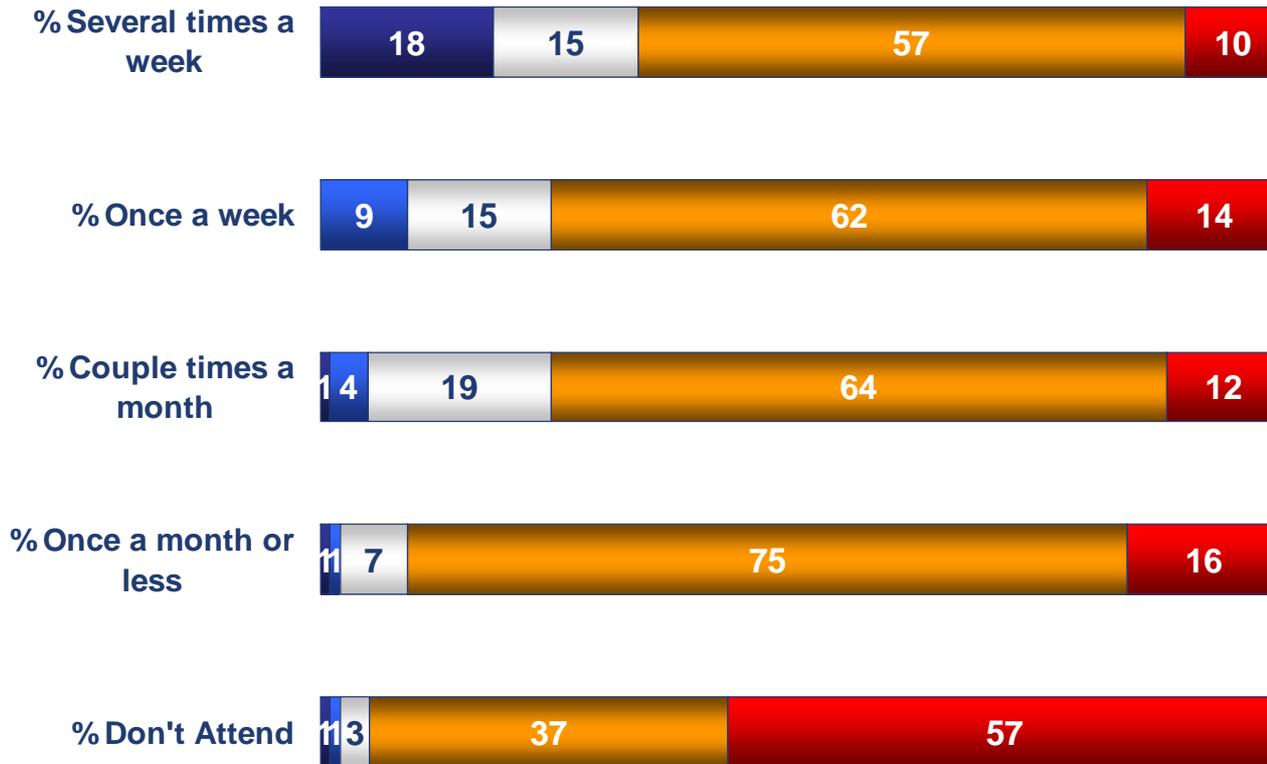


Crosstab – Frequency Going to Museums/Theaters vs. Gleason Theater

Attending Gleason Theater

- % Several times a week
- % Once a week
- % Couple times a month
- % Once a month or less
- % Don't attend

Go to Museums/Theaters

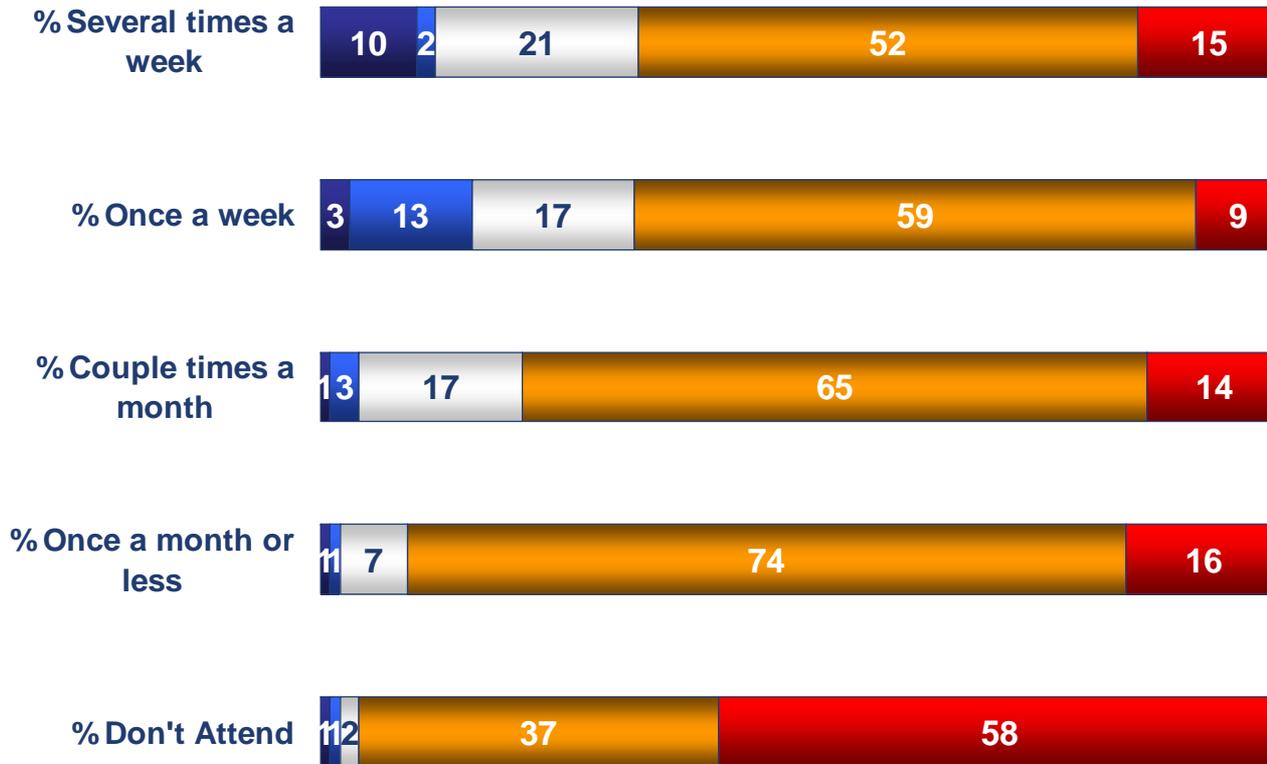


Crosstab – Frequency Going to Restaurants vs. Gleason Theater

Attending Gleason Theater

- % Several times a week
- % Once a week
- % Couple times a month
- % Once a month or less
- % Don't attend

Go to Restaurants

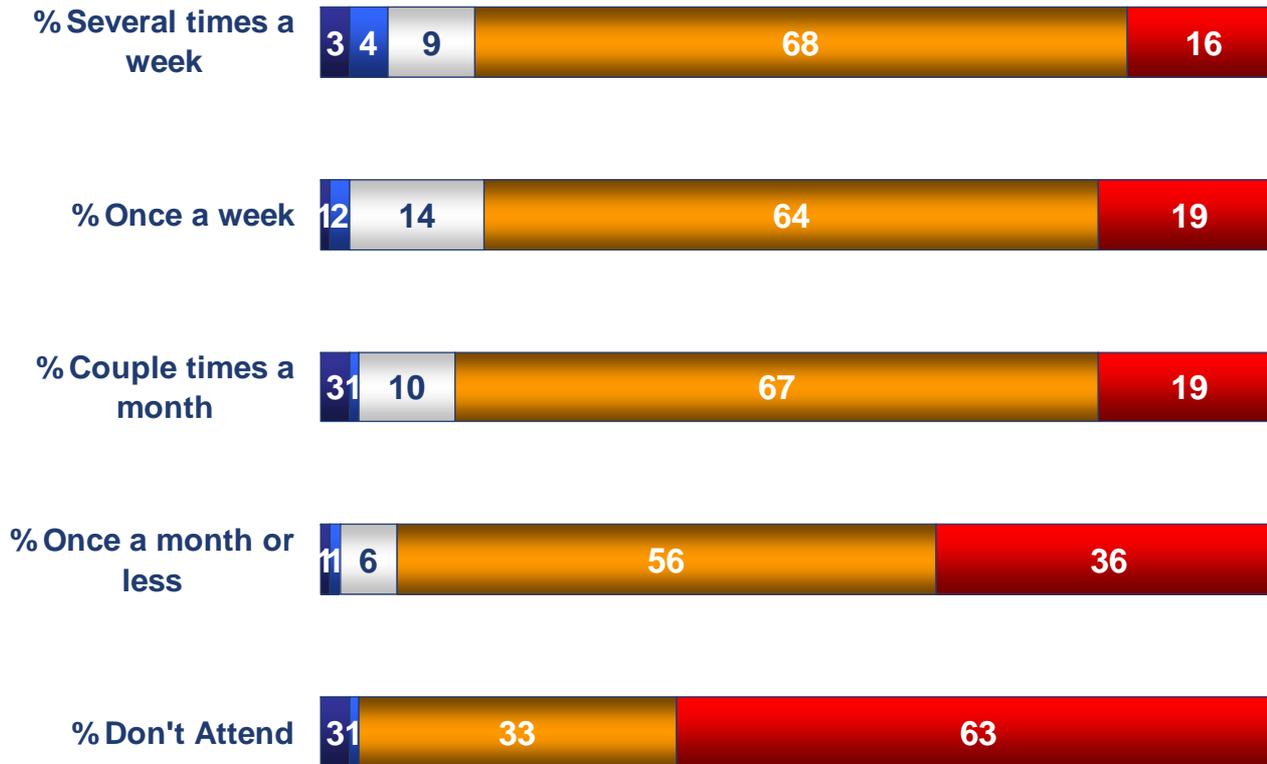


Crosstab – Frequency Going to Cultural Activities vs. Gleason Theater

Attending Gleason Theater

- % Several times a week
- % Once a week
- % Couple times a month
- % Once a month or less
- % Don't attend

Go to Cultural Activities



Culture and Entertainment

Availability of restaurants

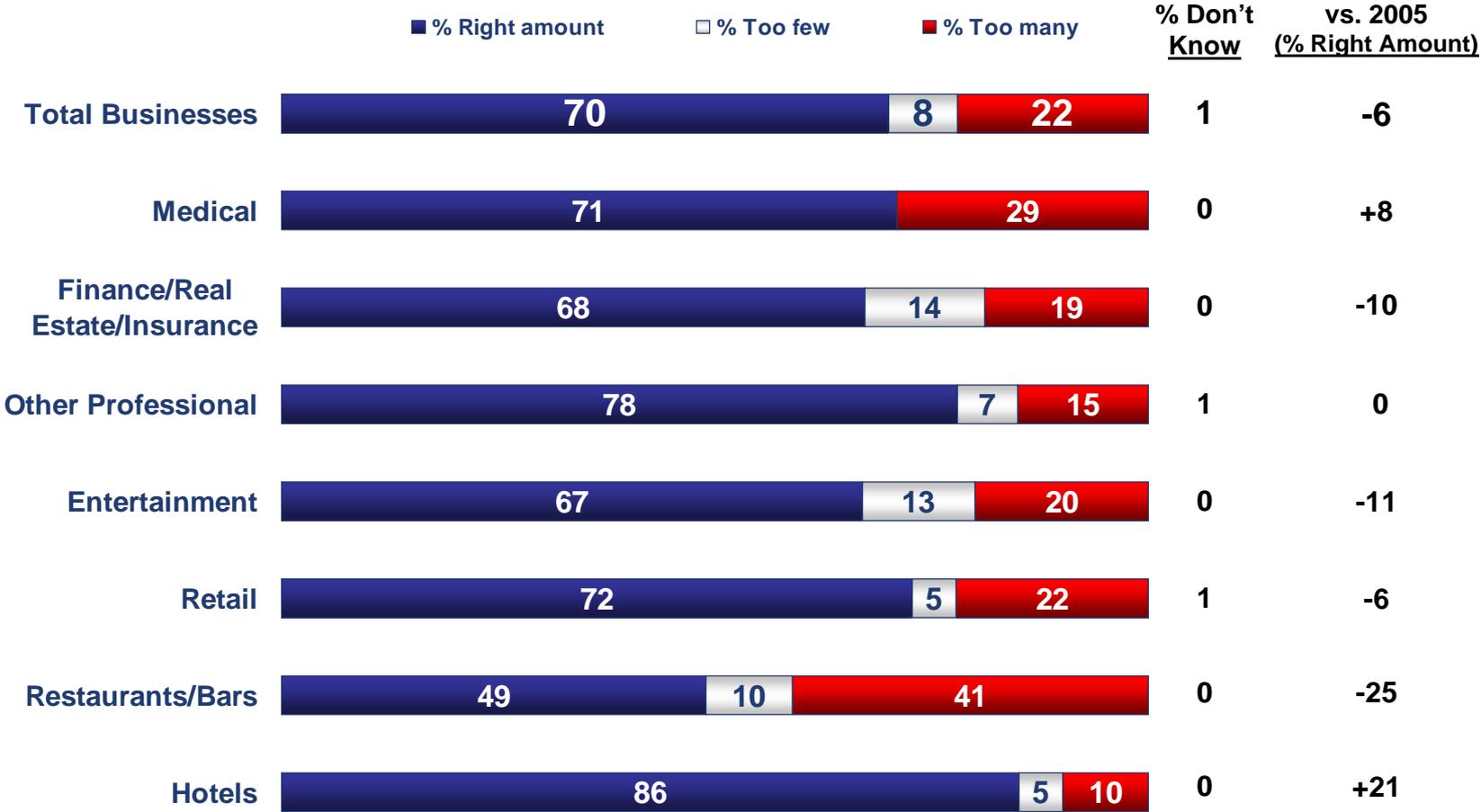


Availability of nightclubs



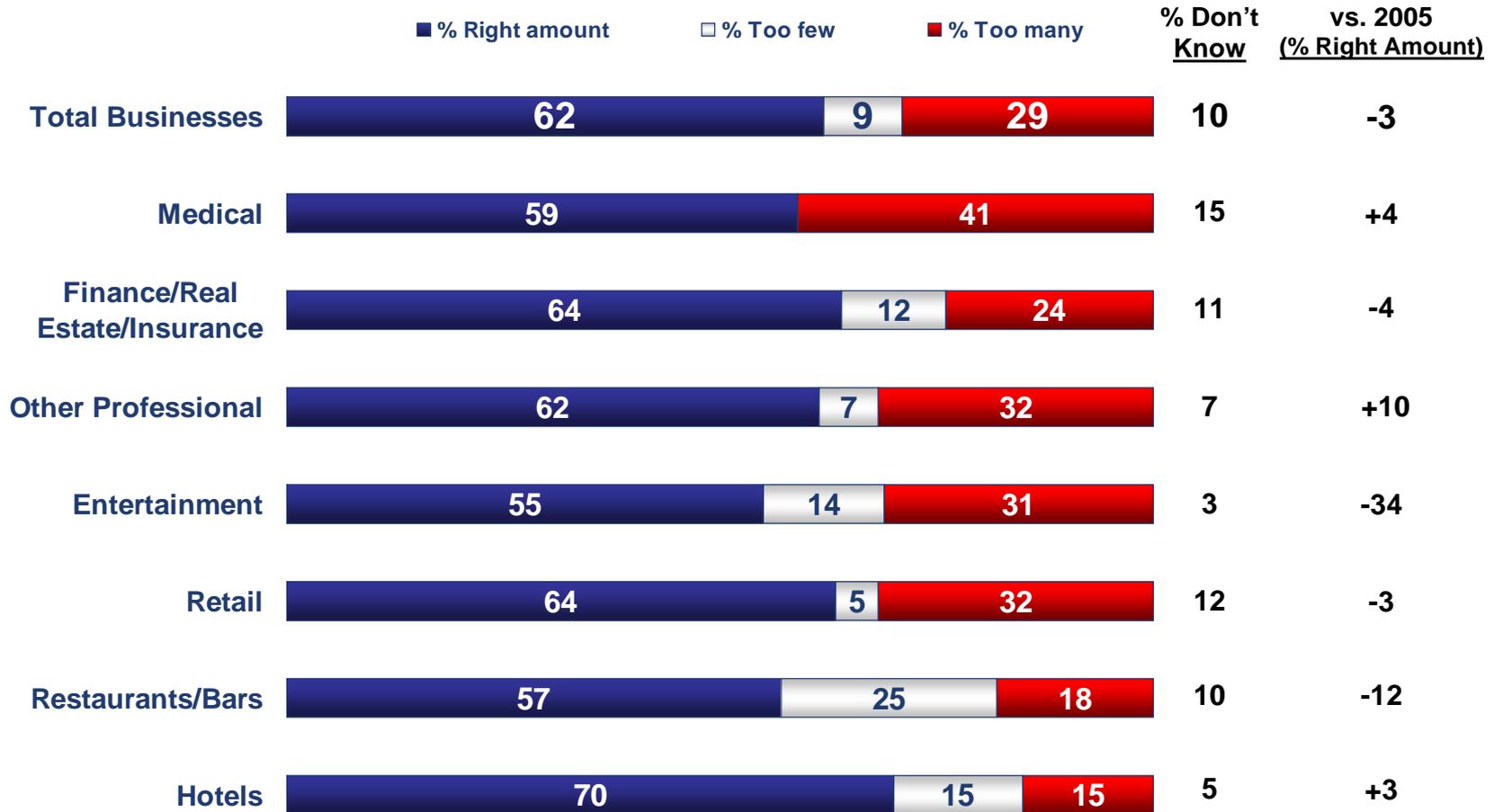
Availability of Restaurants – Businesses

How do you feel about the availability of restaurants?



Availability of Nightclubs – Businesses

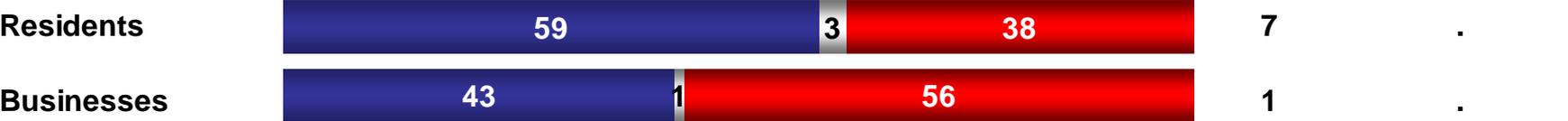
How do you feel about the availability of nightclubs?



Culture and Entertainment

■ % Right Amount
 ■ % Too Many
 ■ % Too Few
 % Don't Know
 vs. 2005 (% Right Amount)

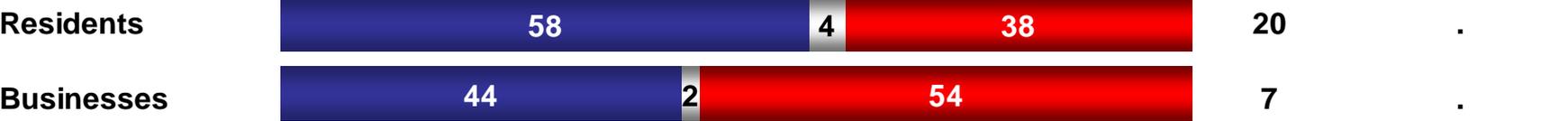
Availability of museums/theaters



Availability of cultural activities



Availability of family-friendly activities



Availability of major events *



* Wording of question altered from 2005

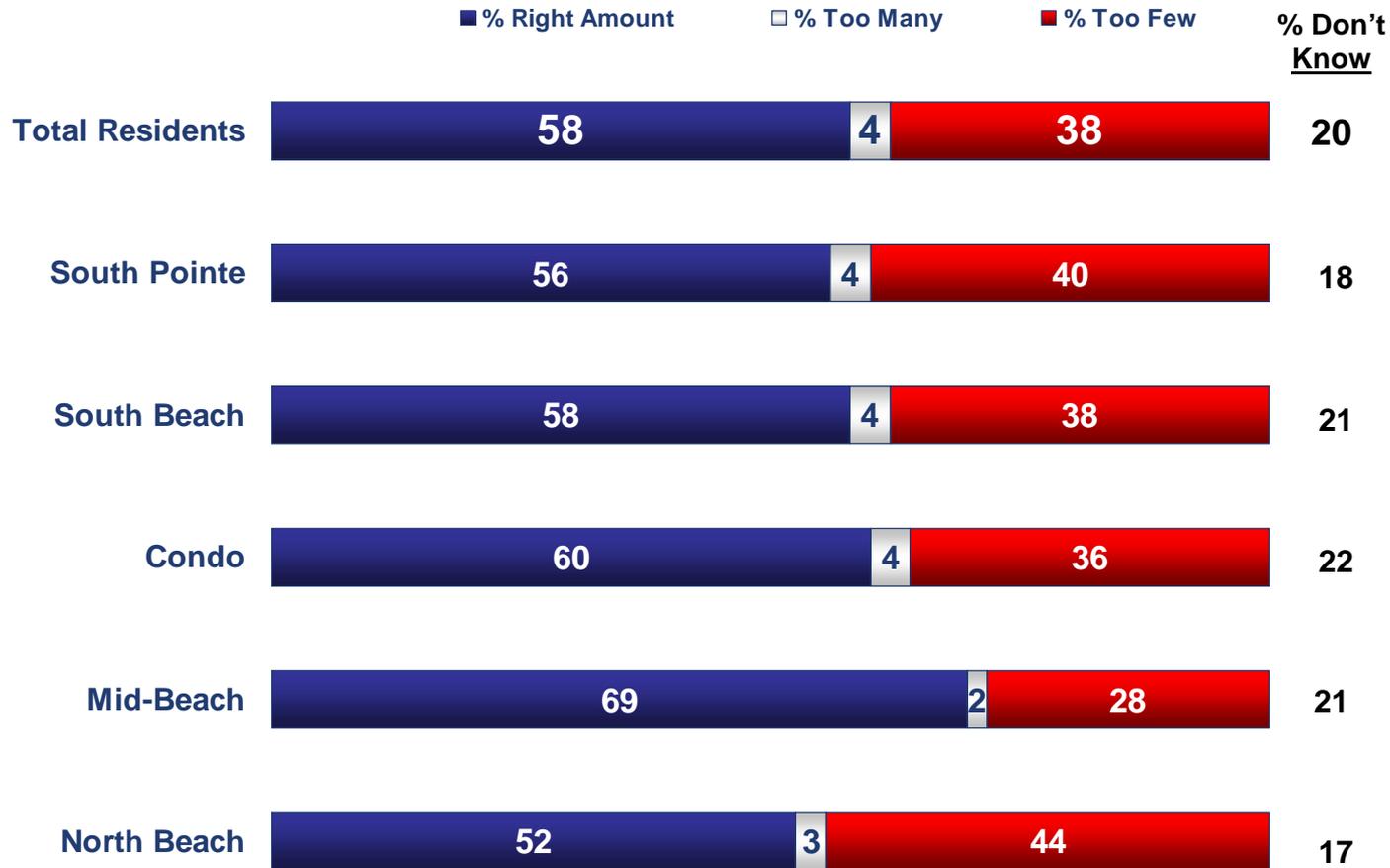
Culture and Entertainment – Residents By Region

Rate the availability of cultural activities

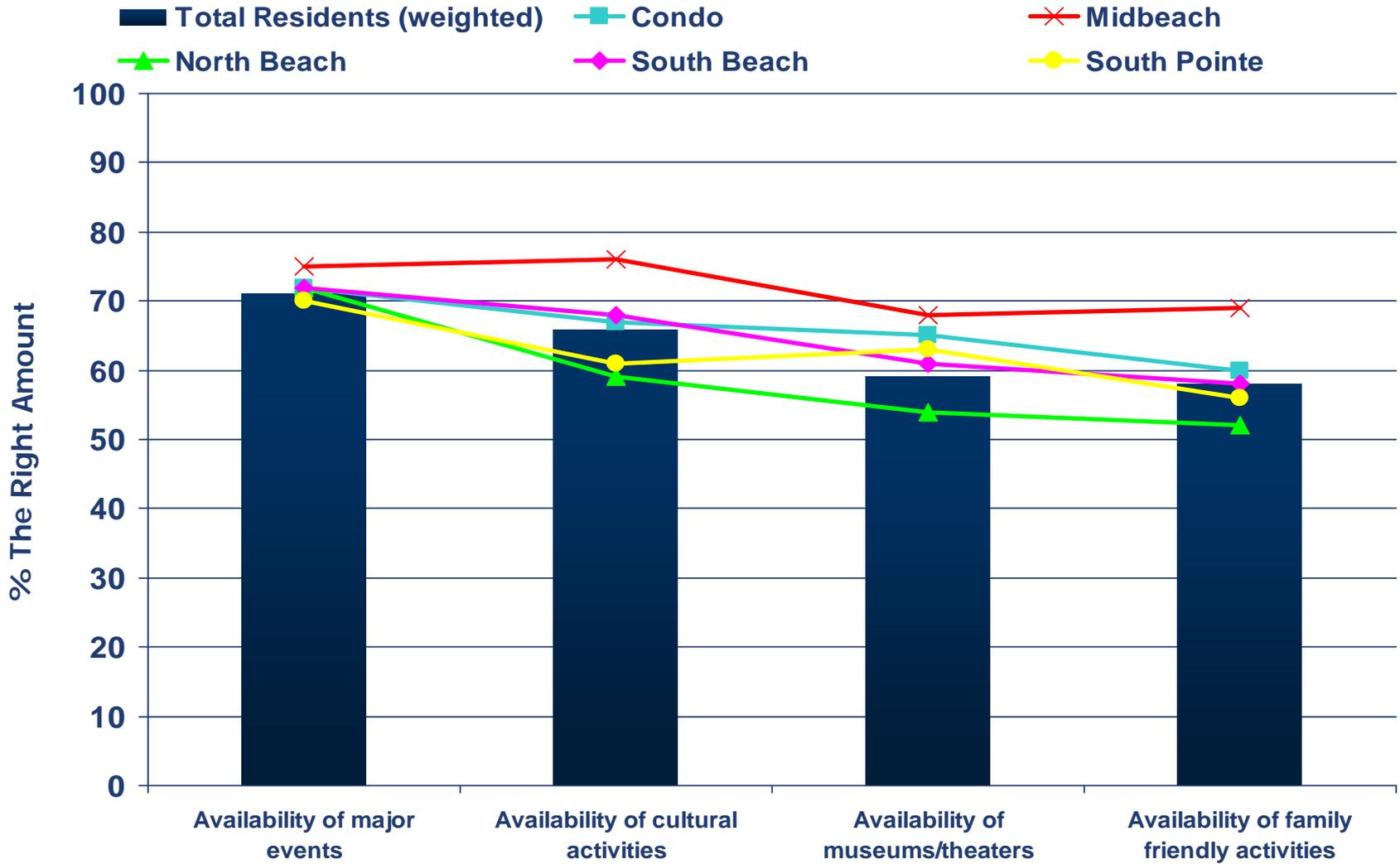


Culture and Entertainment – Residents By Region

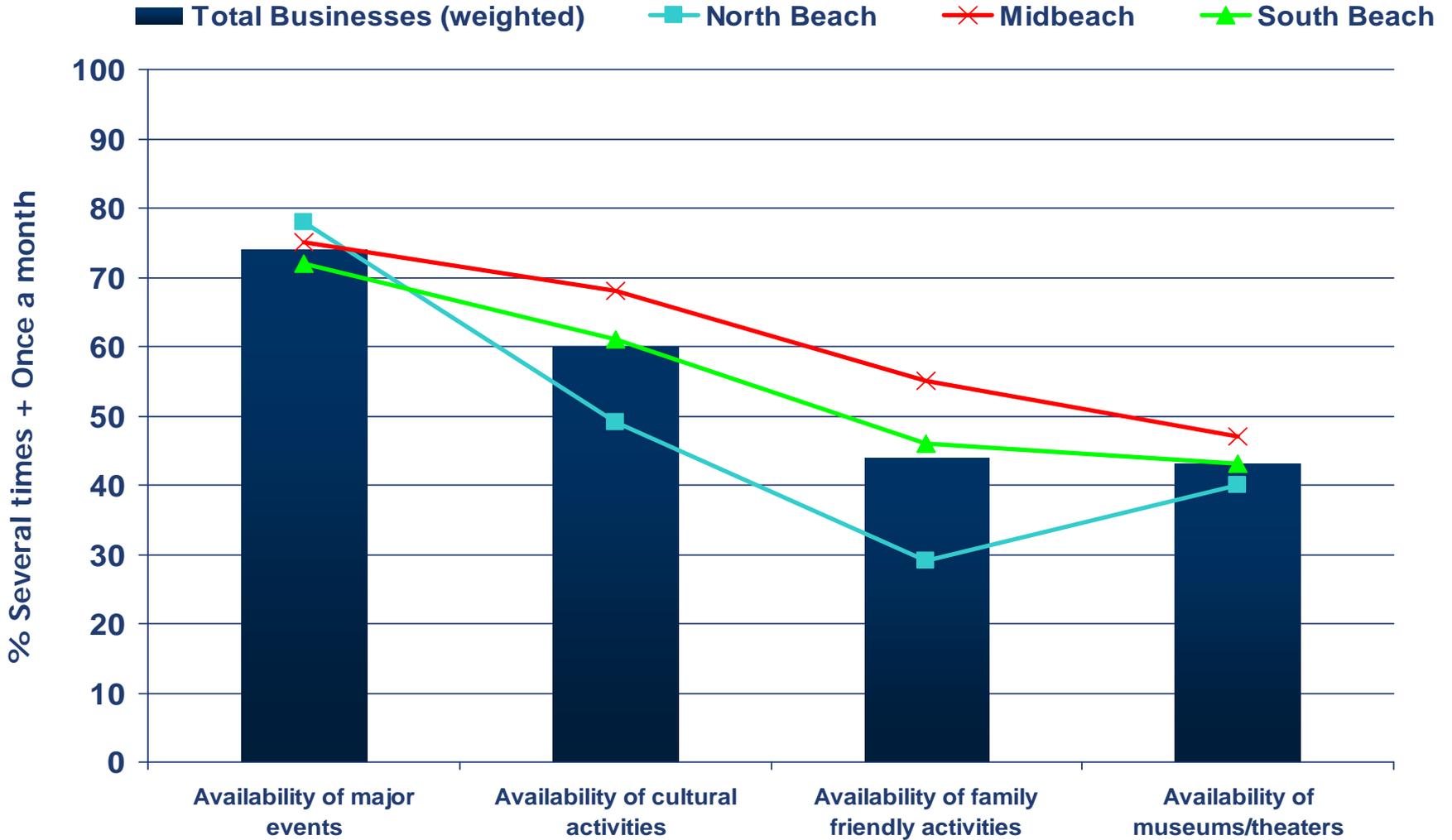
Rate the availability of family-friendly activities



Culture and Entertainment – Residents by Region



Culture and Entertainment – Businesses by Region



Preferred Cultural Activity – Residents

What type of cultural activity would you most like to see more of in the City?

<u>Category</u>	<u>%</u> <u>TOTAL</u>	<u>%</u> <u>NB</u>	<u>%</u> <u>MB</u>	<u>%</u> <u>CC</u>	<u>%</u> <u>SB</u>	<u>%</u> <u>SP</u>
1) Live music/concerts	28	21	20	20	26	29
2) Plays	16	14	23	21	16	18
3) Art shows	10	9	11	11	7	6
4) Music or Movies in our parks	10	11	8	5	5	7
5) Symphonic Music	10	14	10	12	13	12
Music or Movies in our beaches	8	7	6	9	9	8
Comedy shows	7	7	6	5	6	5
Dance	6	6	3	4	8	3
Other*	5	3	9	6	3	3
Don't Know	7	8	5	6	7	8

*Most commonly mentioned included: opera, classical music, ballet, Cirque de Soleil

Preferred Cultural Activity – Businesses

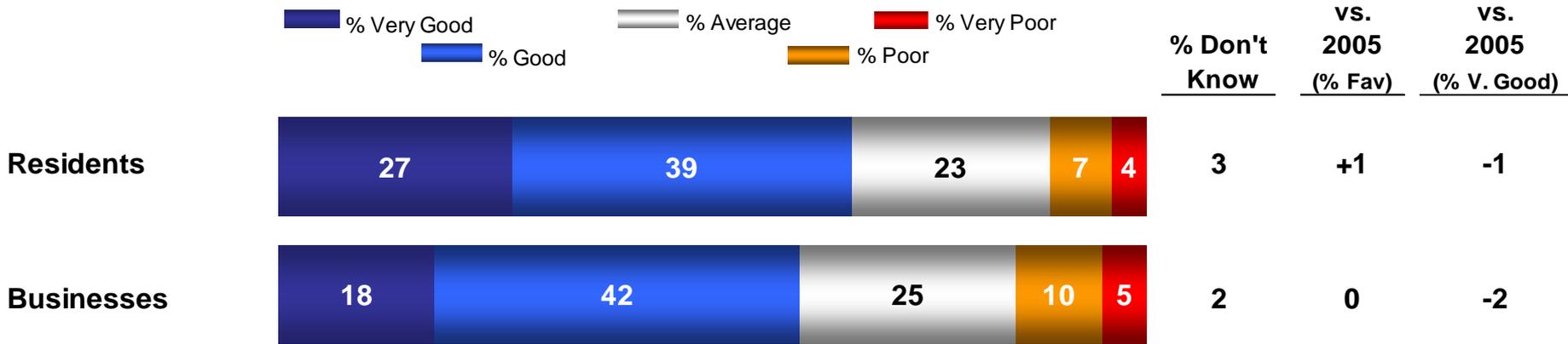
What type of cultural activity would you most like to see more of in the City?

<u>Category</u>	<u>%</u> <u>TOTAL</u>	<u>%</u> <u>NB</u>	<u>%</u> <u>MB</u>	<u>%</u> <u>SB</u>
1) Live music/concerts	29	34	19	27
2) Plays	16	12	18	15
3) Art shows	13	11	9	14
4) Music or Movies in our beaches	13	16	9	12
5) Music or Movies in our parks	8	2	9	8
Comedy shows	7	9	5	6
Symphonic music	6	7	13	4
Dance	1	1	2	1
Other*	7	6	9	6
Don't Know	6	3	7	7

*Most commonly mentioned included: more family activities
(of any kind) that include children, expos/trade shows

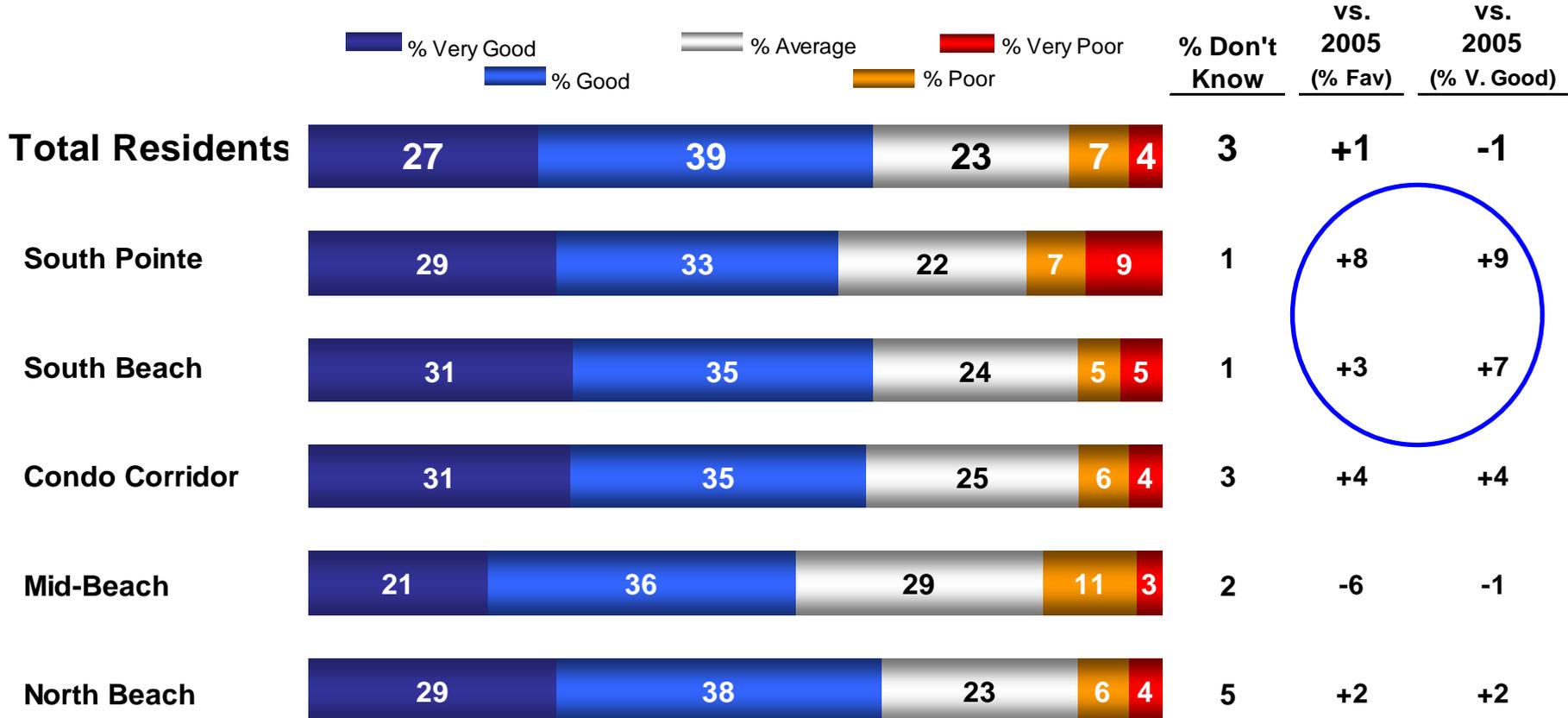
Culture and Entertainment

How good a job do you feel City government is doing with respect to handling events that attract large crowds to Miami Beach?



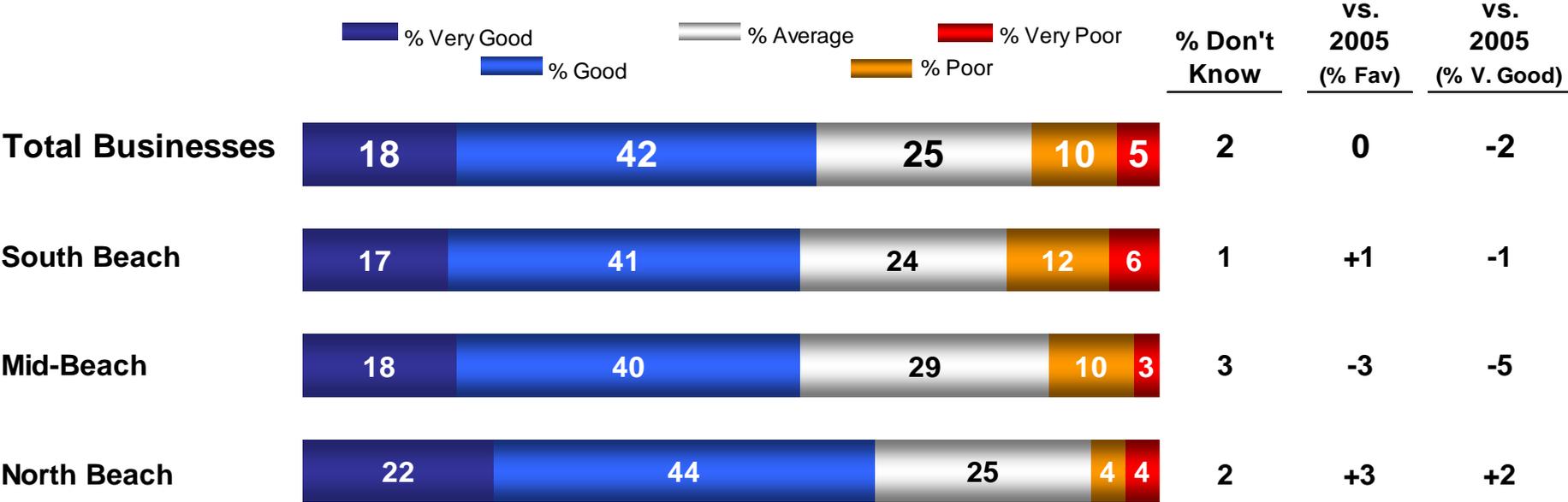
Culture and Entertainment

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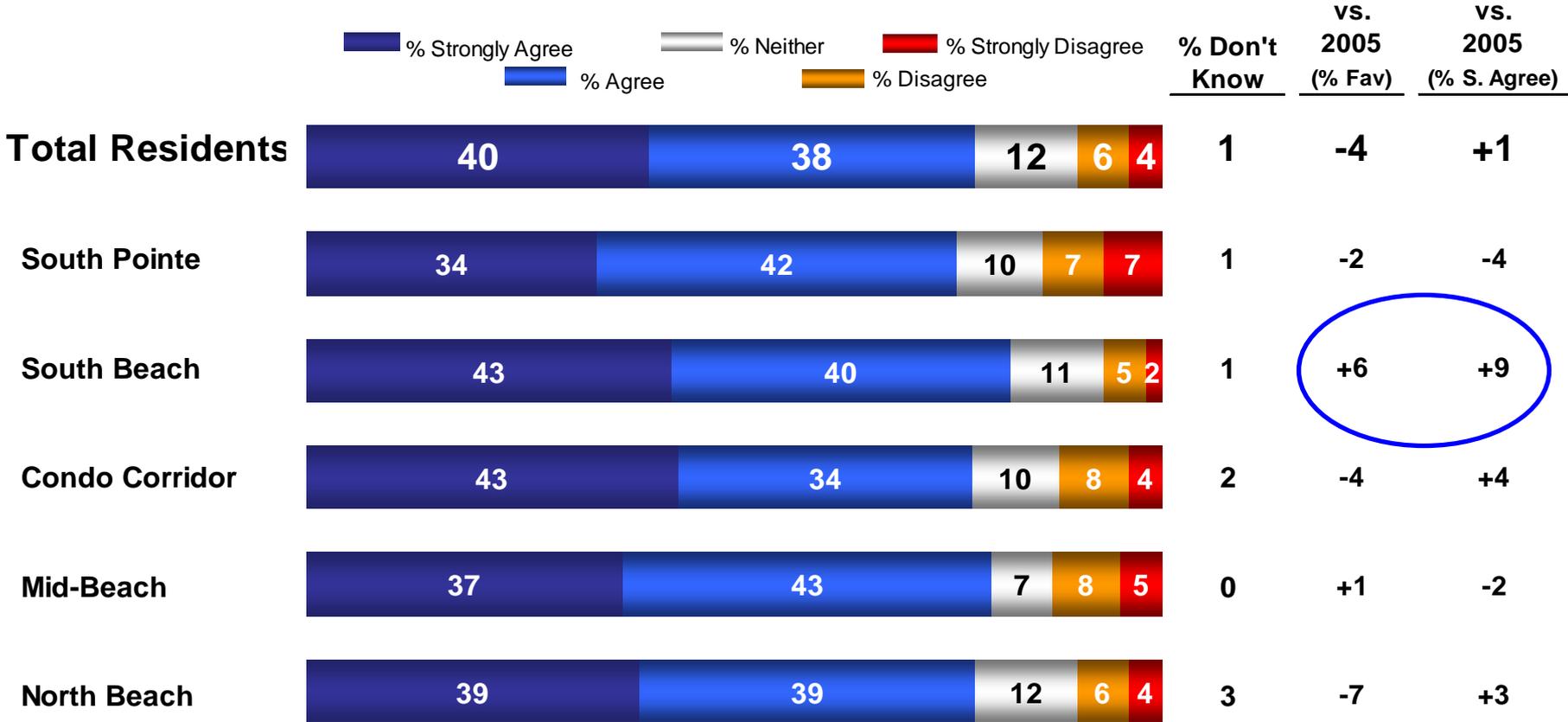
Culture and Entertainment

How good a job do you feel City government is doing with respect to handling events that attract large crowds to Miami Beach?



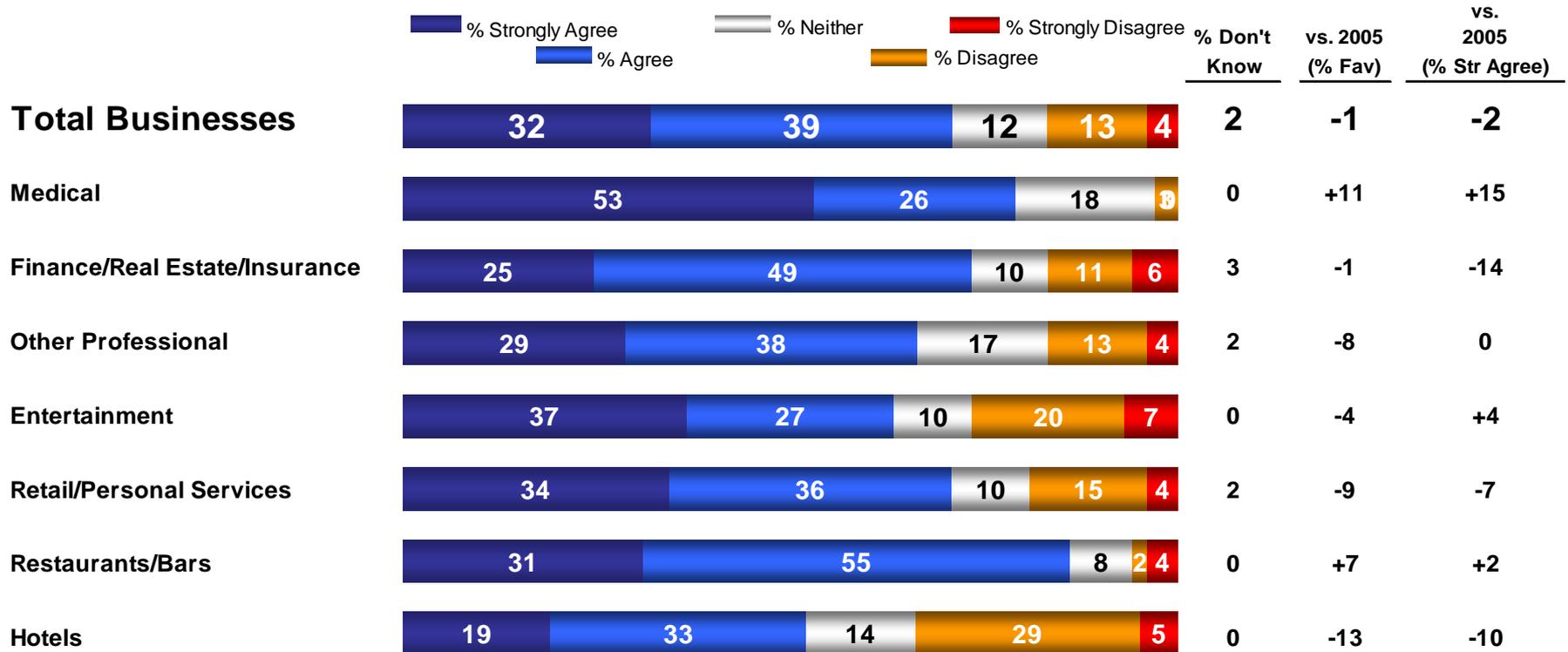
Tourism – Residents

The tourism industry in Miami Beach contributes to the quality of life for residents within the City.



Contribution to Business Viability

Miami Beach residents are key contributors to the viability of my business in the City.



Culture, Entertainment & Tourism – In Sum

- Nearly 2/3 of residents surveyed indicate they attend restaurants at least once a week – this is up 9 points from 2005
 - 76% of Mid-Beach residents attend restaurants at least once a week (the most of all regions); conversely, only half of North Beach residents go at least once a week
- Many residents take advantage of natural surroundings, with about half indicating they attend beaches or parks/recreational facilities at least once a week
 - Condo Corridor and South Pointe residents have highest usage of beaches; Mid-Beach residents report the least
 - However, only 1/3 of Condo Corridor residents use the parks/recreational facilities
- Museums, cultural activities, family friendly activities and especially nightclubs less frequently attended
 - North Beach residents lowest on attending museums or family friendly activities
- Around 2/3 of residents say they go to the Convention Center or Jackie Gleason at least once a month; Byron Carlyle Theater the least attended (60% do not attend at all)
 - There is a positive correlation between going to restaurants and frequency in attending theaters like the Jackie Gleason
 - Suggests that to increase usage of facilities/theaters, offer ‘packages’ of theater/show and dinner

Culture, Entertainment & Tourism – In Sum (cont'd)

- Clear majority of businesses feel there are the right number of restaurants and nightclubs across the City
- Most residents and businesses also say the number of major events (festivals, holiday celebrations, etc.) is the right amount (and this is consistent across region) and that the City handles events in an 'Excellent' or 'Good' manner
- 60% of businesses and 66% of residents now say there are the right number of cultural activities – this has increased a few points from 2005
 - North Beach though not as satisfied with the amount (corresponds to their reported infrequent usage)
 - Residents and businesses are aligned in their preference for the types of cultural activities they'd like to see, with live music/concerts clearly the most preferred, followed by plays, art shows, music/movies on beaches/parks and symphonic music
- Availability of museums and family friendly activities more mixed – majority of residents say there is the right amount of each but over 1/3 still say there are too few – businesses especially so, as over half say there are not enough of either
 - This is more an issue in North Beach

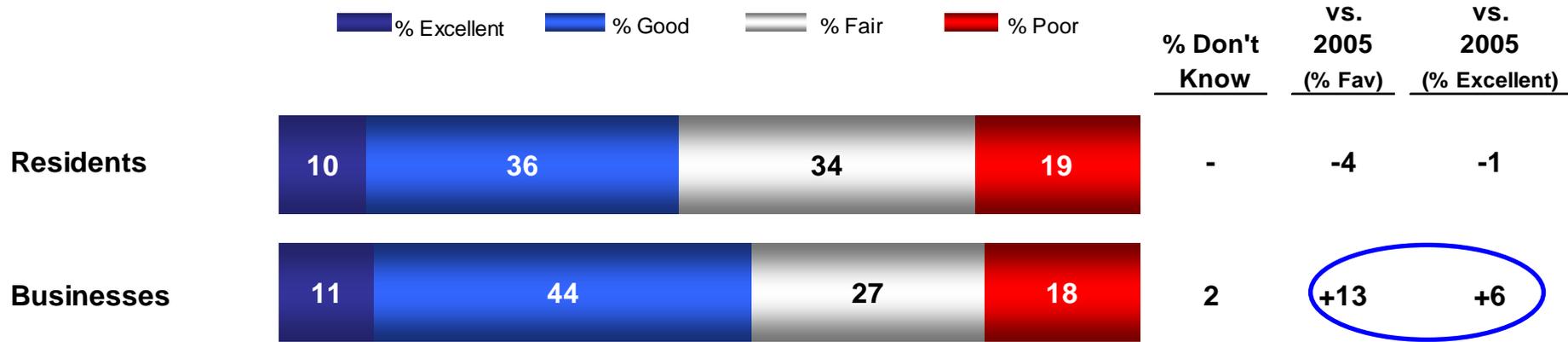
Culture, Entertainment & Tourism – In Sum (cont'd)

- Most residents believe tourism contributes to quality of life, though South Pointe residents less favorable (perhaps as they feel the impact the most)
- Around 70% of businesses see residents as key contributors to their viability, with medical establishments and restaurants/bars leading the way (aligns with previously seen data that 63% of residents frequent local restaurants at least once a week); hotels not as favorable

***Results by Survey Category –
Economy/Taxes***

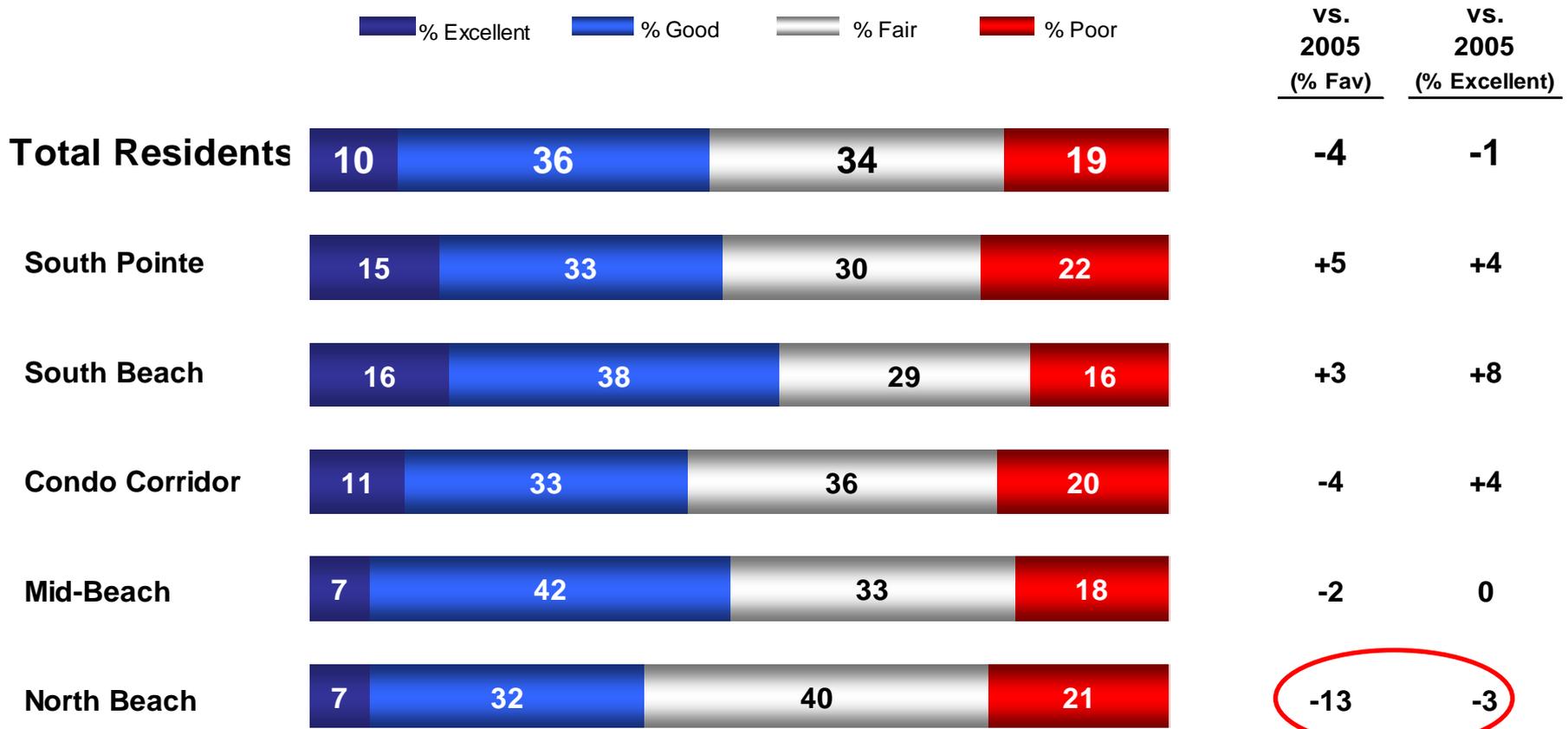
Value of Services for Tax Dollars Paid

Rate the overall value of City services for the tax dollars that you pay.



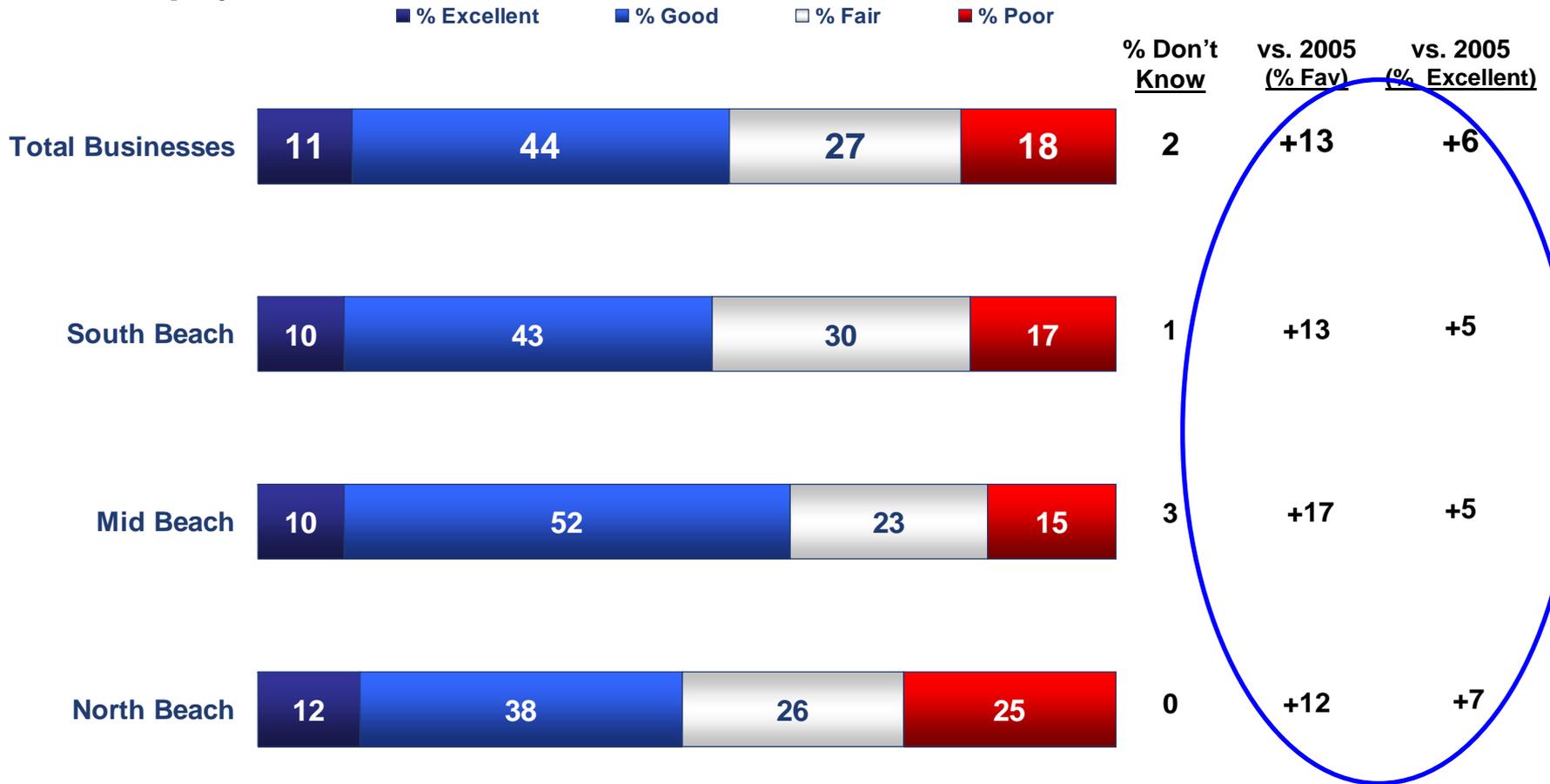
Value of Services for Tax Dollars Paid – Residents by Region

Rate the overall value of City services for the tax dollars that you pay.



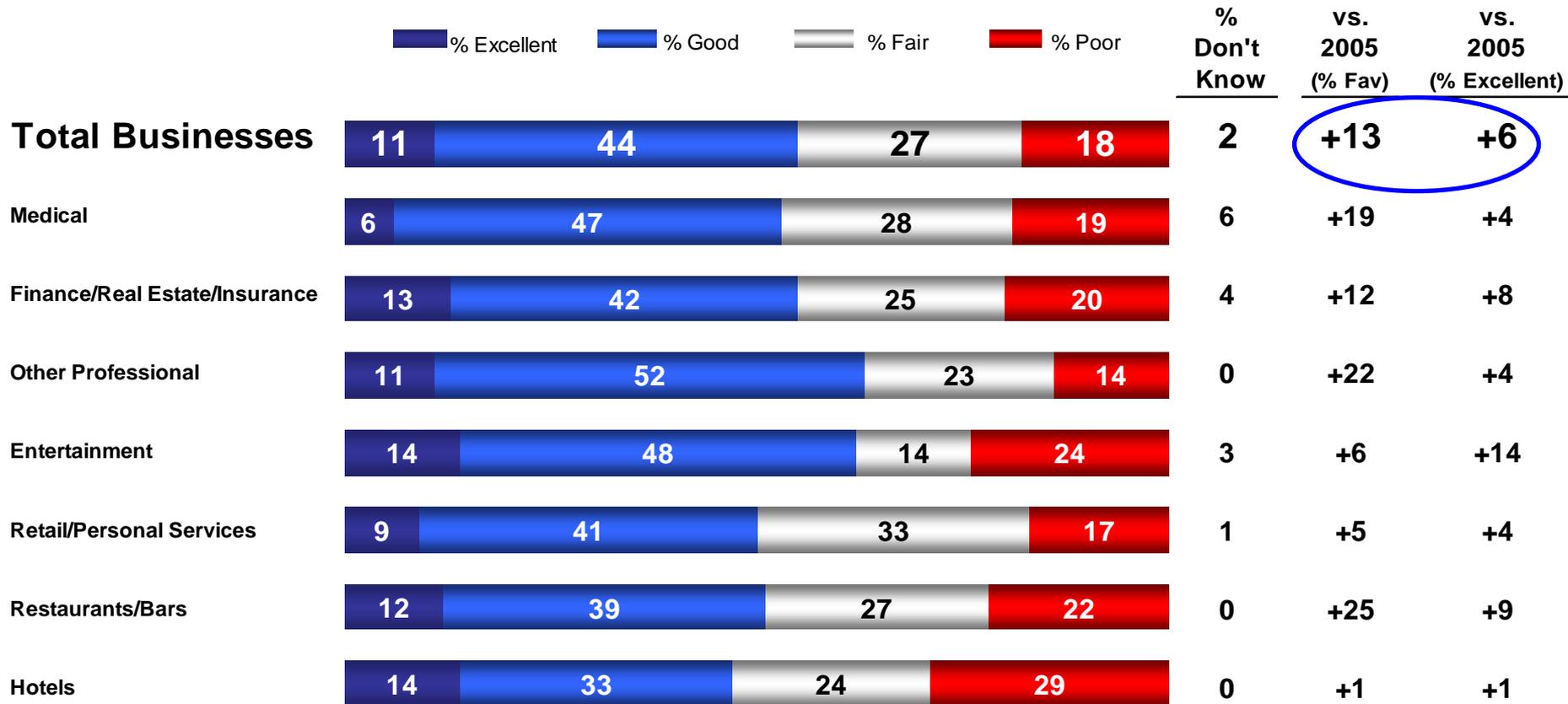
Value of Services for Tax Dollars Paid – By Business Region

Rate the overall value of the City services for the tax dollars that your business pays

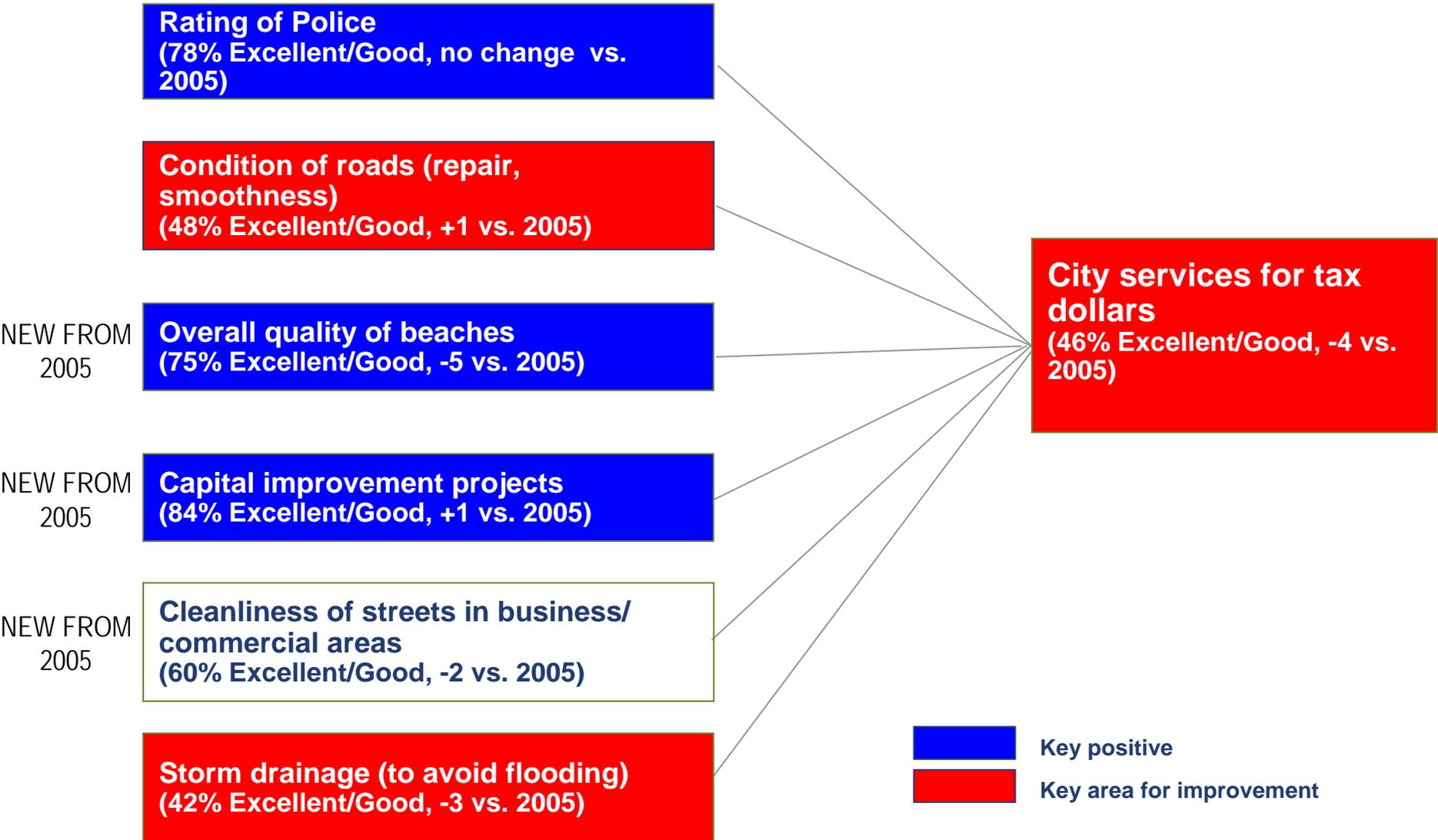


Value of Services for Tax Dollars Paid – By Business Type

Rate the overall value of City services for the tax dollars that your business pays.



Key Drivers of Value of Services for Tax Dollars Paid – Residents



Key Drivers of Value of Services for Tax Dollars Paid – Businesses

NEW FROM 2005

Job the City is doing handling major events
 (60% Very Good/Good, no change vs. 2005)

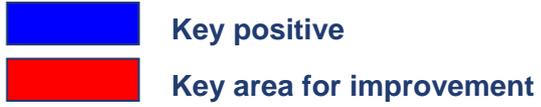
Landscape maintenance in rights of way and public areas
 (75% Excellent/Good, +8 vs. 2005)

Cleanliness of streets
 (51% Excellent/Good, +3 vs. 2005)

NEW FROM 2005

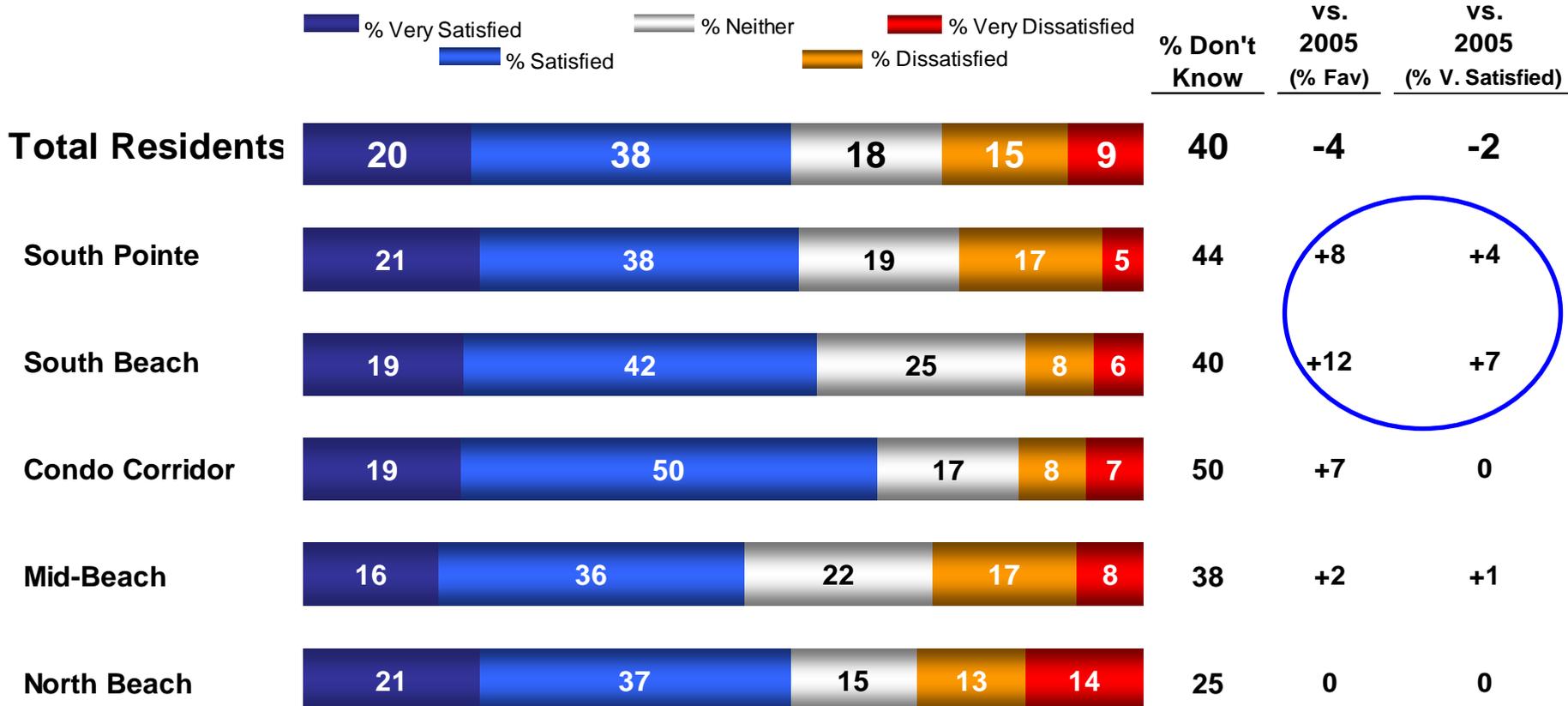
Condition of sidewalks
 (54% Excellent/Good, +6 vs. 2005)

City services for tax dollars paid
 (55% Excellent/Good, +13 vs. 2005)



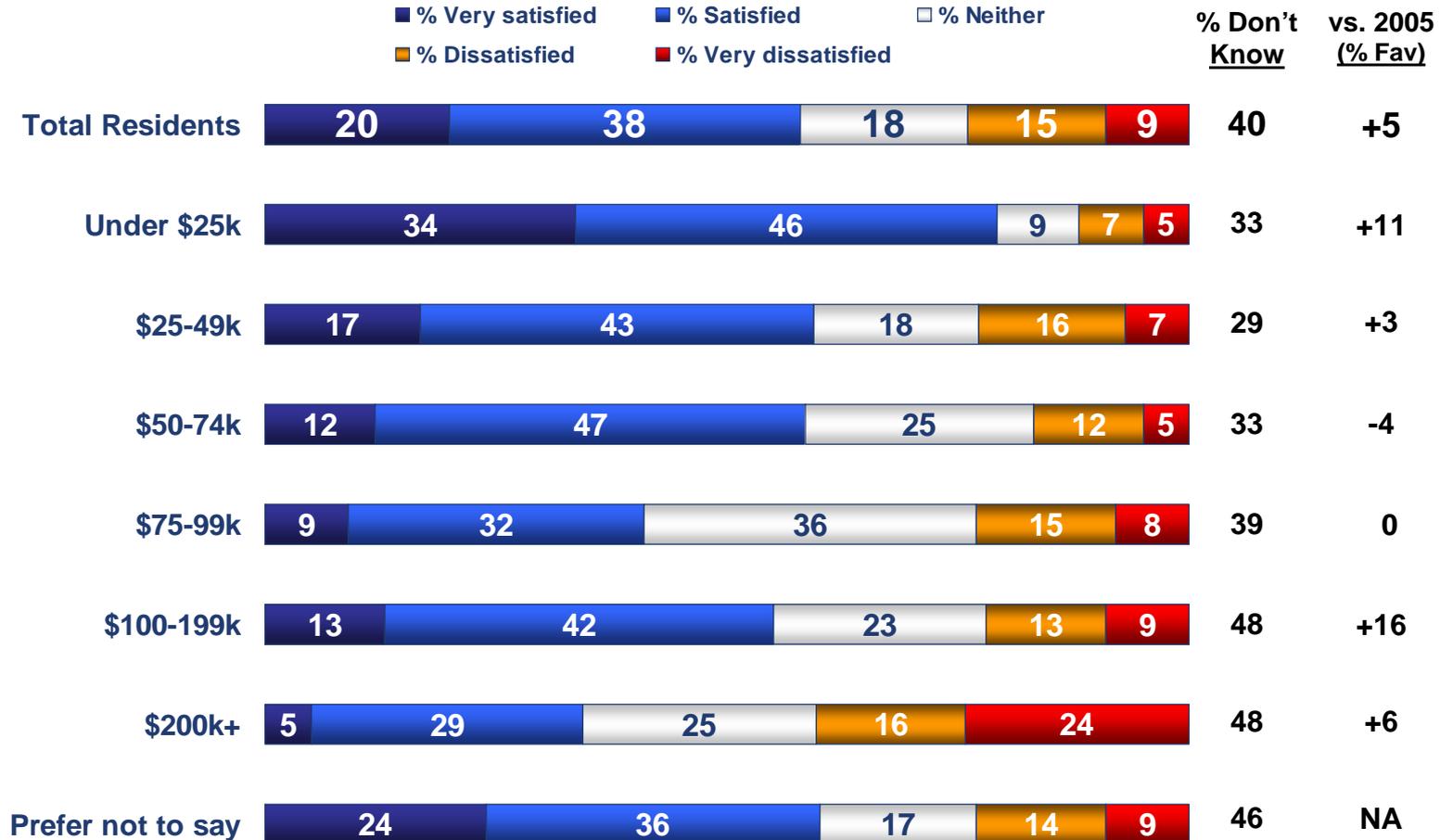
Satisfaction with Local Schools – Residents

What is your level of satisfaction with local schools within the City of Miami Beach?



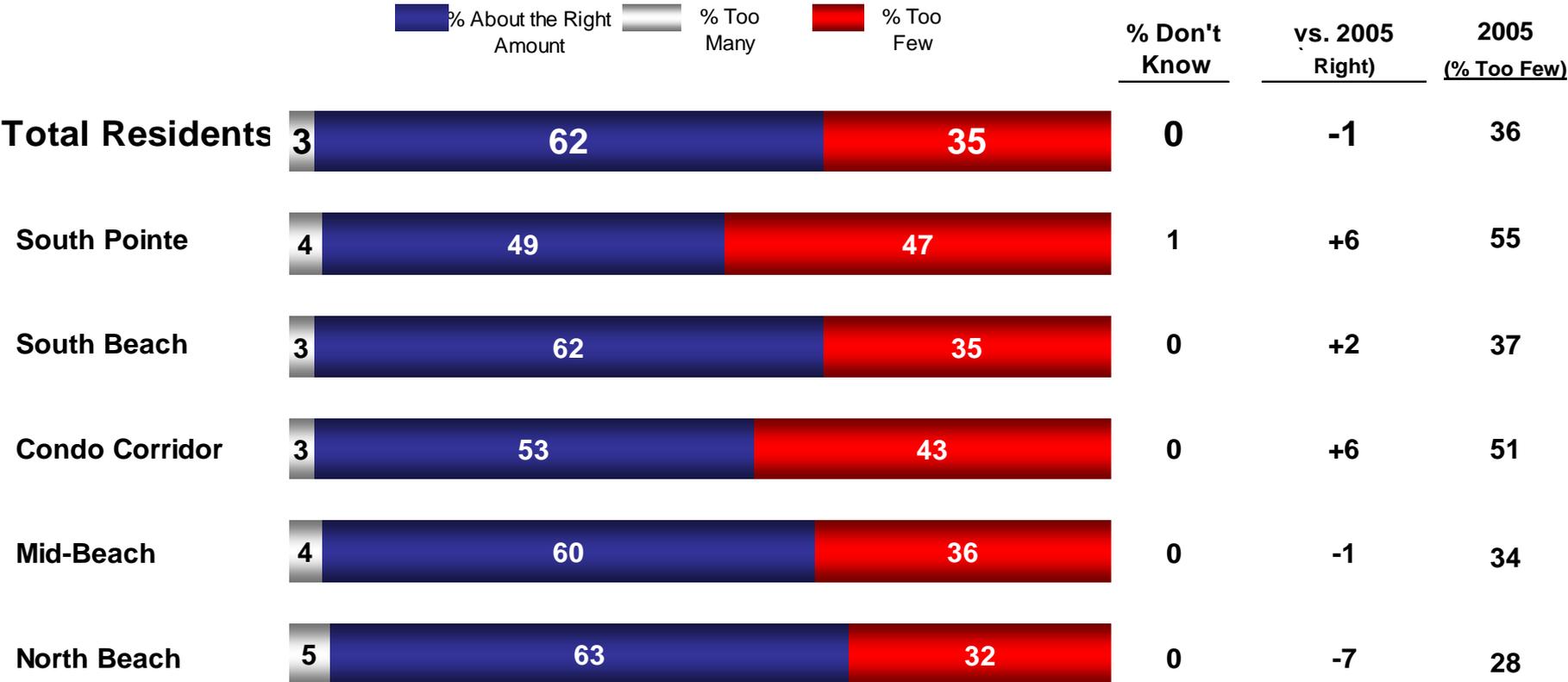
Satisfaction with Local Schools – Residents By Income

What is your level of satisfaction with local schools within the City of Miami Beach?



Availability of Stores

How do you feel about the availability of stores that service your basic daily needs in your neighborhood?



Most Important Area for Miami Beach to Spend Tax Dollars – Residents

What is the most important area for the City to spend its tax dollars?

<u>Category</u>	<u>%</u> <u>TOTAL</u>	<u>%</u> <u>NB</u>	<u>%</u> <u>MB</u>	<u>%</u> <u>CC</u>	<u>%</u> <u>SB</u>	<u>%</u> <u>SP</u>
1) Housing	30	32	25	26	33	20
2) Storm drainage improvements	13	14	12	10	11	14
3) Cleanliness of the City	12	9	9	12	13	18
4) Supplementing school programs	9	14	10	9	4	8
More police/fire services	8	7	17	9	8	10
Beautification	7	6	6	5	8	13
Ensuring fiscal health	6	3	7	4	4	4
Homeowners dividend	6	5	6	11	9	4
Funding for Mt. Sinai Hospital	4	3	4	8	3	5
Other*	3	4	4	1	4	1
Don't Know	3	3	0	4	3	2

**Most commonly mentioned included: fighting safety/crime, improving traffic/transportation, limit construction*

Spending tax dollars on Housing vs. what Residents want to see with housing

Which do you feel the City should most ensure with regards to housing in the City of Miami Beach?

NOTE: DATA IS ONLY FOR RESIDENTS WHO CHOSE THAT THE CITY SHOULD SPEND TAX DOLLARS ON HOUSING

<u>Option</u>	% <u>TOTAL</u>	% <u>NB</u>	% <u>MB</u>	% <u>CC</u>	% <u>SB</u>	% <u>SP</u>
1) Housing for <\$50k income	36	47	25	33	36	36
2) Housing for elderly/seniors	36	32	40	39	37	31
3) Housing for \$50-80k income	10	8	17	9	9	10
4) Retention of rental units	8	6	8	6	9	15
5) No action needed	2	1	3	3	2	2
Other*	3	2	2	4	5	3
Don't know	5	4	6	7	2	3

Economy/Taxes – Resident Normative Comparison*

Similar Cities

Question	City of Miami Beach Rating	Rank	Number of Jurisdictions	Miami Beach Percentile	Comparison to Norm	Vs. 2005 Comparison to Norm
Value of services for tax dollars	46	7	11	45%	Below norm	No change
Local schools	61	2	16	94%	Above norm	No change

Florida Only

Value of services for tax dollars	46	15	19	26%	Below norm	No change
Local schools	61	3	18	89%	Above norm	No change

Population bet. 70,000 to 100,000 Norms

Value of services for tax dollars	46	19	20	10%	Below norm	Declined
Local schools	61	6	16	69%	Above norm	Improved

All Jurisdictions

Value of services for tax dollars	46	145	167	14%	Below norm	No change
Local schools	61	52	136	63%	Above norm	Improved

*Comparative citizen opinions came from the National Research Center, Inc. database of citizen survey results

Economy/Taxes – In Sum

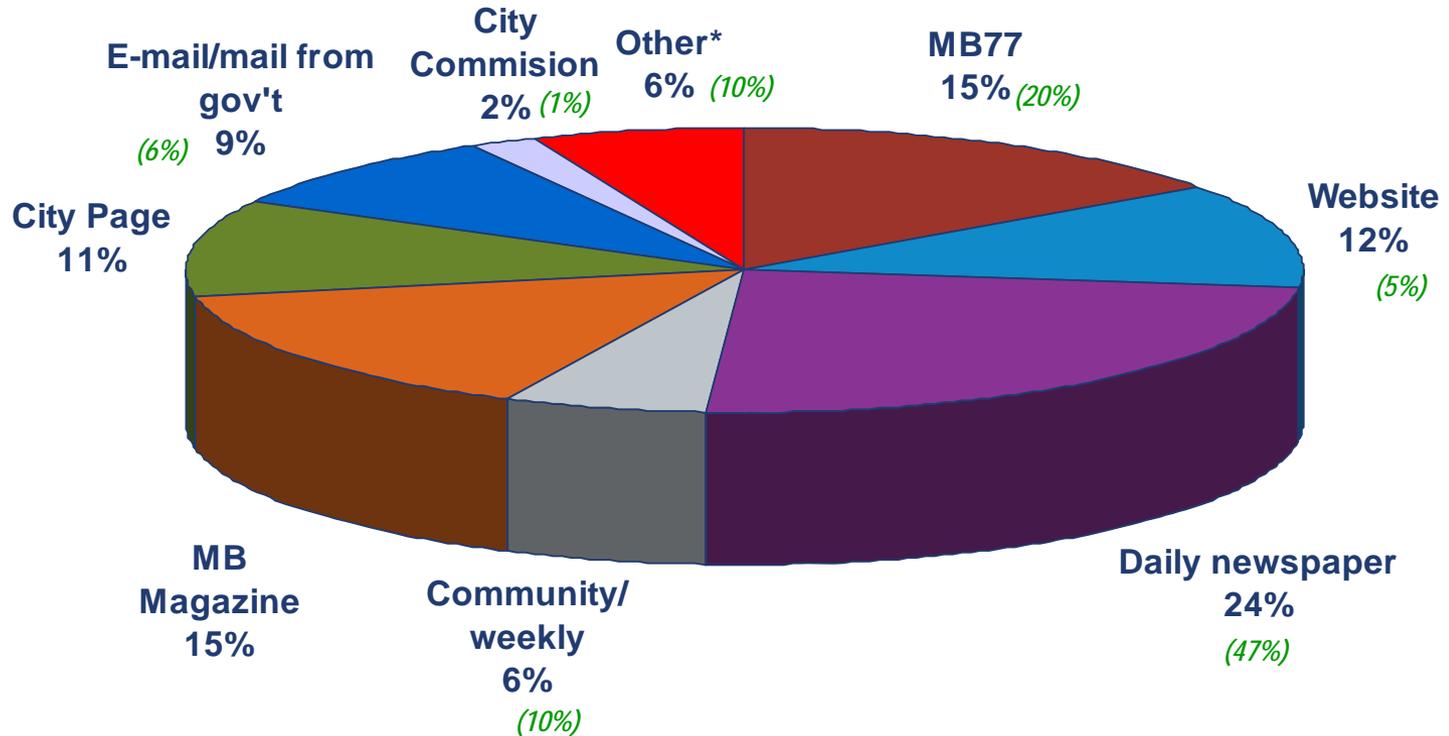
- Overall, residents remain lukewarm about what they receive (services) for what they give (taxes) – result declined slightly from 2005; however, businesses significantly improved in their view of services received for taxes paid
 - For residents, result driven by view of police (which, as seen earlier, was positive) but also by ratings on infrastructure items (road condition, cleanliness of business/commercial streets and storm drainage)
 - Result for this item compares below all normative comparisons
- Majority of residents generally favorable about local schools (views are now above norm on all comparisons)
 - North Beach is the only region that does not show improvement on this item
 - Middle income residents tend to be more critical of schools and results declining from 2005; those with income of \$200k or more are the most unfavorable about local schools
- Nearly 2/3 feel that there is the right amount of stores that service basic daily needs, though over 40% of Condo Corridor and South Pointe residents still say there are too few
- 30% feel it is most important for the City to spend tax dollars on housing, followed by storm drainage (13%) and cleanliness (12%)
 - Supplementing school programs also important for North Beach residents (consistent with their less positive view of schools) while Mid-Beach residents would like to see more police/fire services

***Results by Survey Category –
Communications/Customer Service***

Communications

How do you most often get your information about the City? [RESIDENTS]

2005 percentage

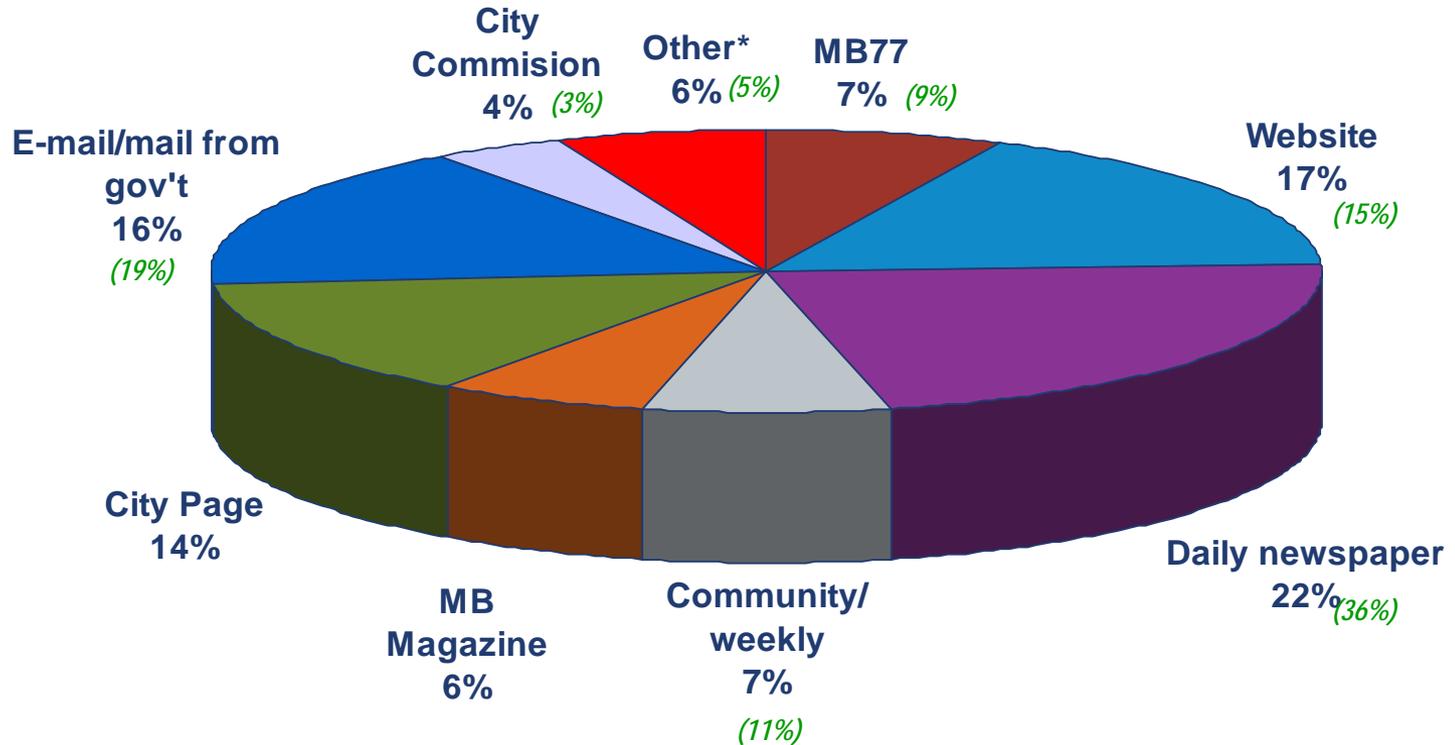


** Most often mentioned include word of mouth*

Communications

How do you most often get your information about the City? [BUSINESSES]

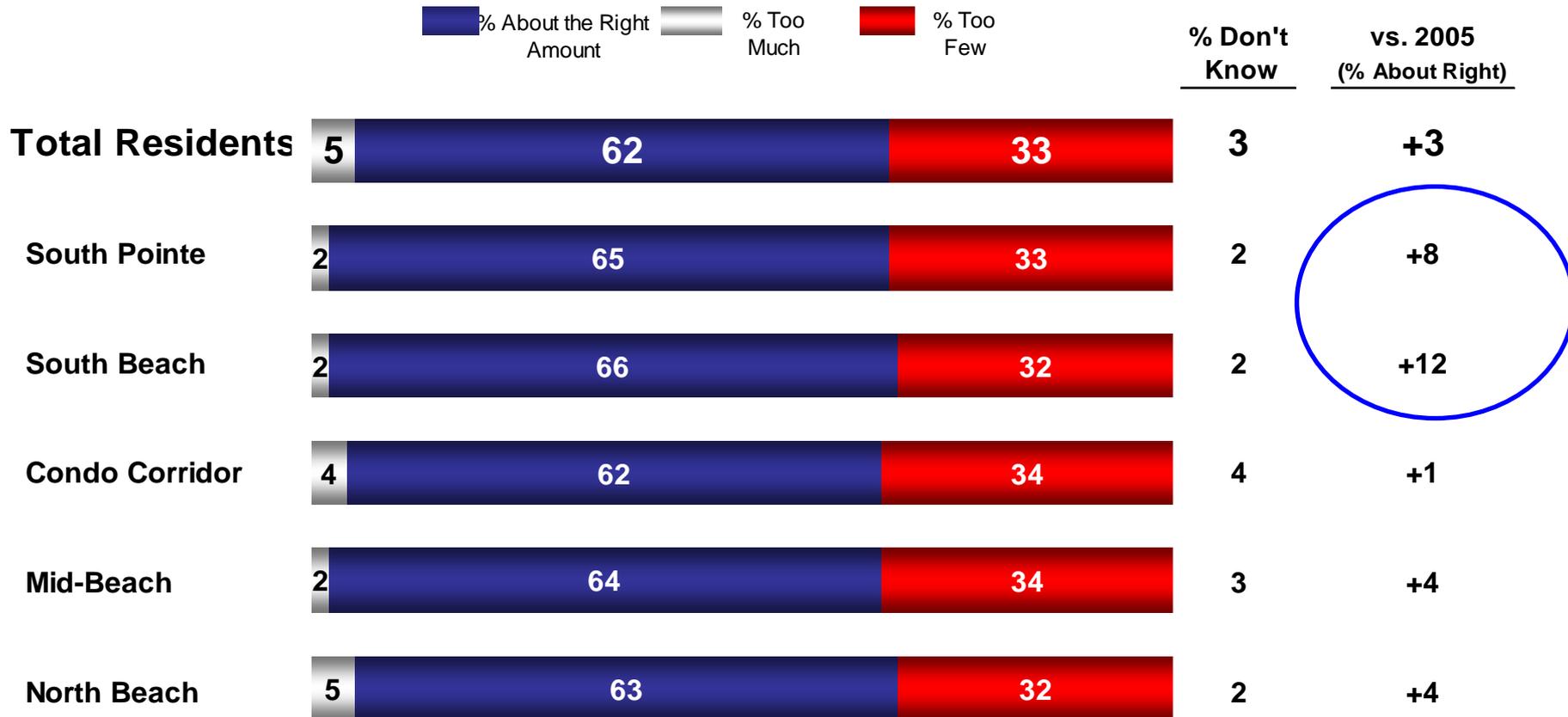
2005 percentage



** Most often mentioned include Chamber of Commerce and word of mouth*

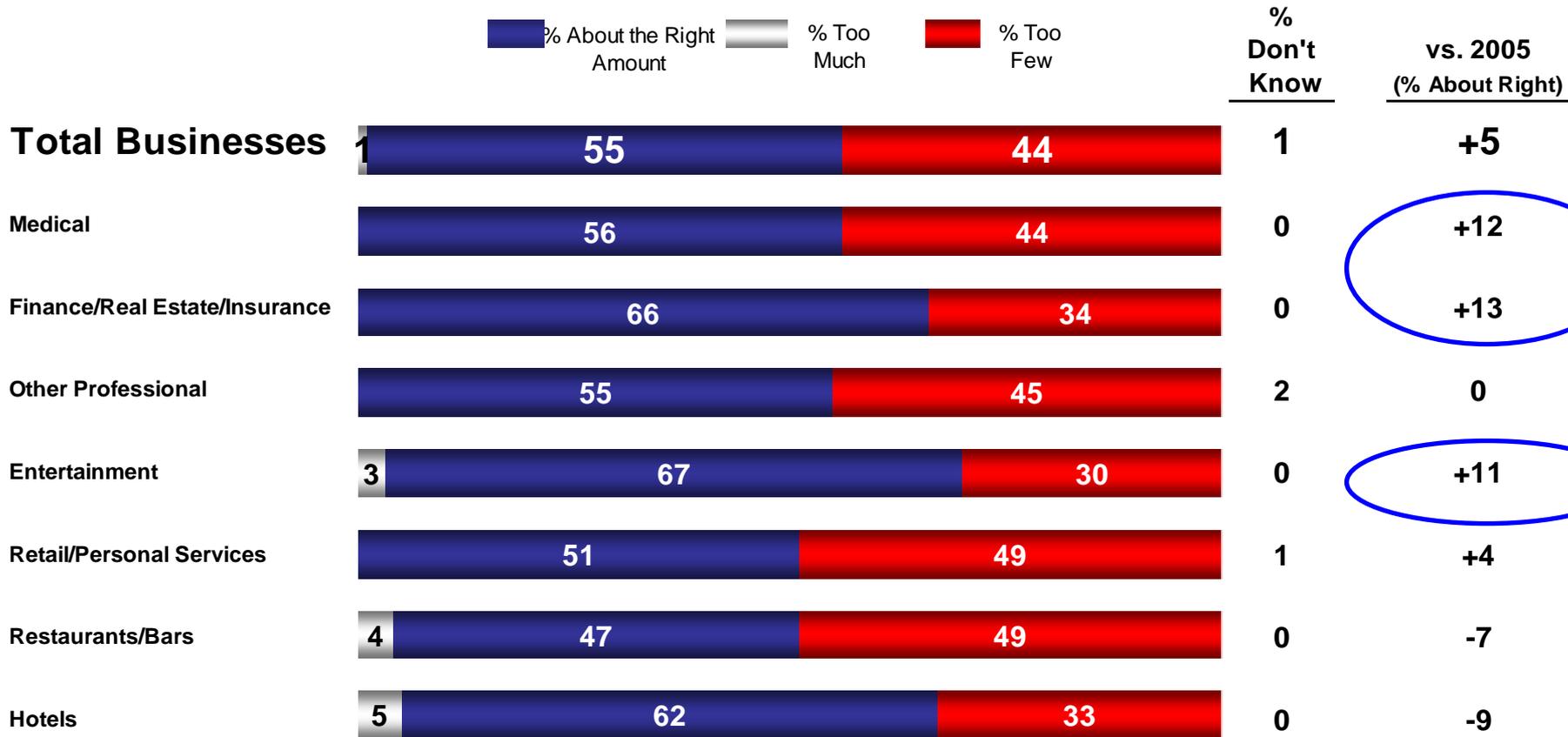
Communications (cont'd)

How do you feel about the amount of information you get from the City?



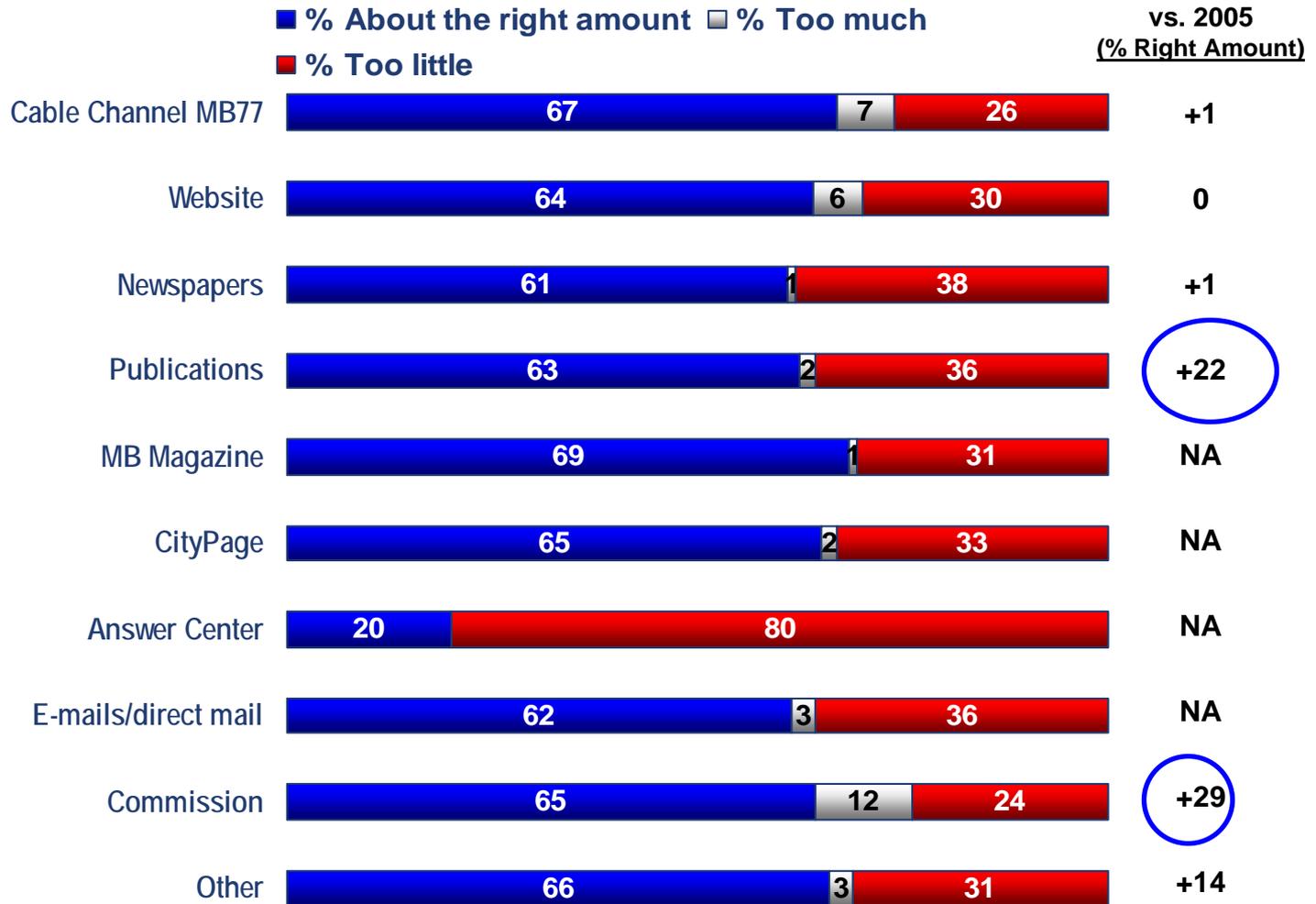
Communications (cont'd)

How do you feel about the amount of information you get from the City?



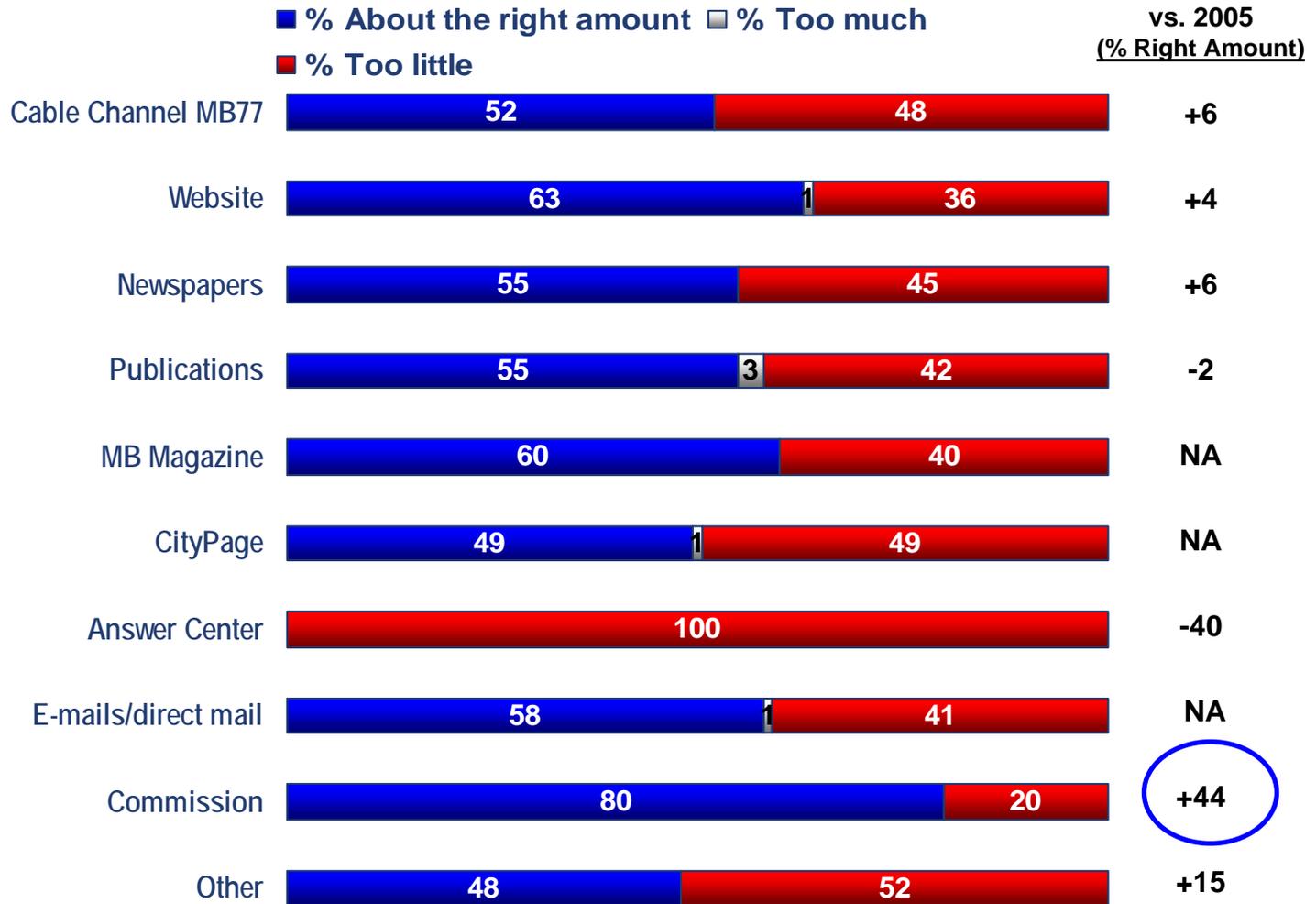
Communications (cont'd)

How do you feel about the amount of information you get from the City? [RESIDENTS]



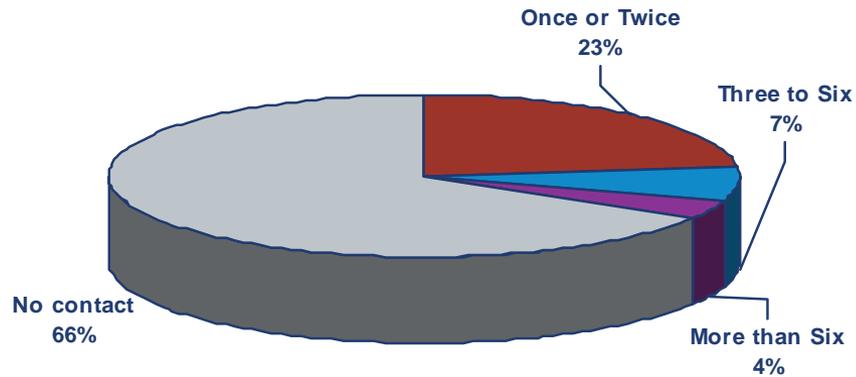
Communications (cont'd)

How do you feel about the amount of information you get from the City? [BUSINESSES]

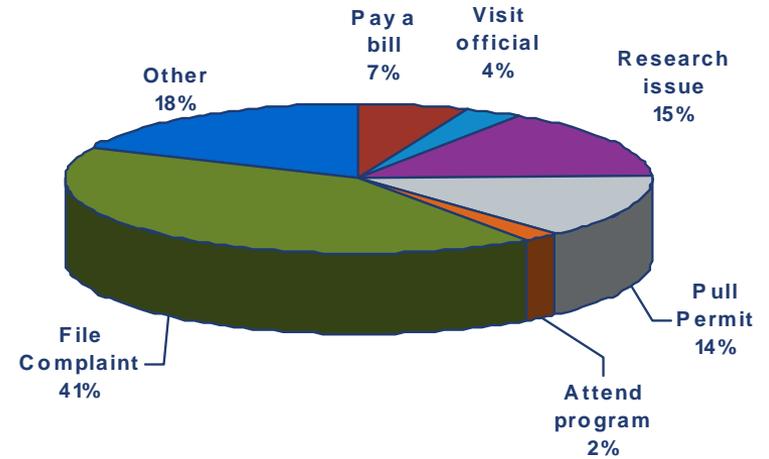


Customer Service – Residents

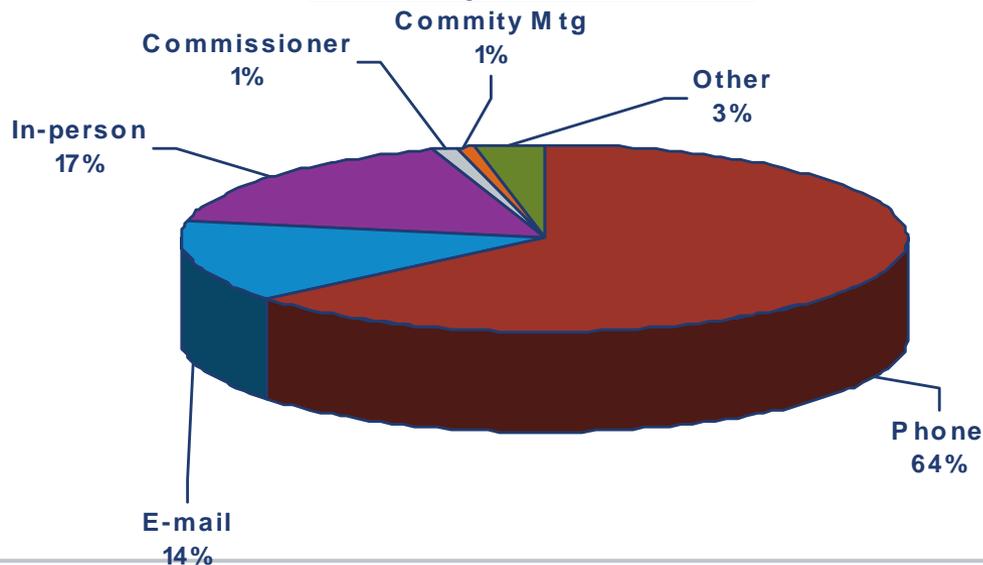
Contacted the City in the past 6 months



Reason for the contact

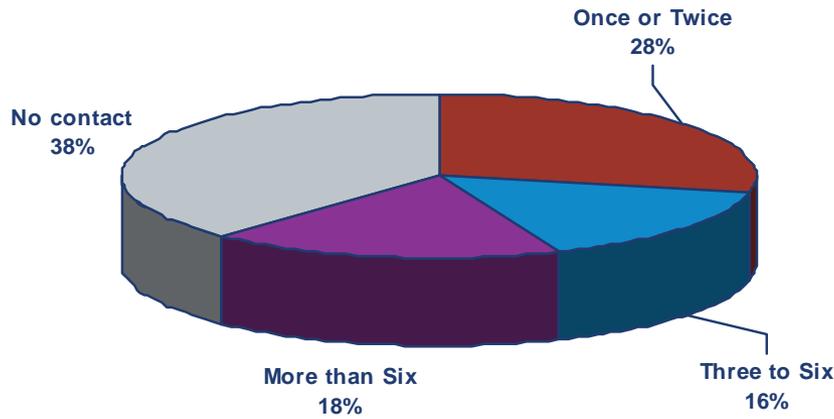


How did you first contact

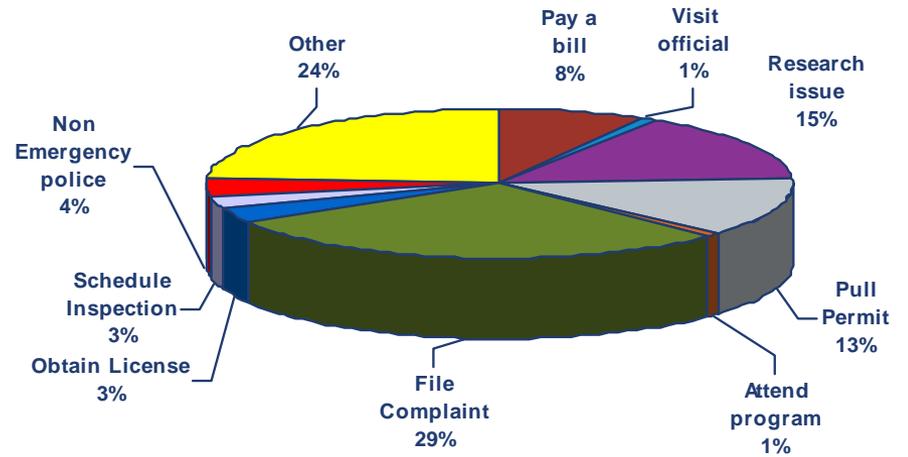


Customer Service – Businesses

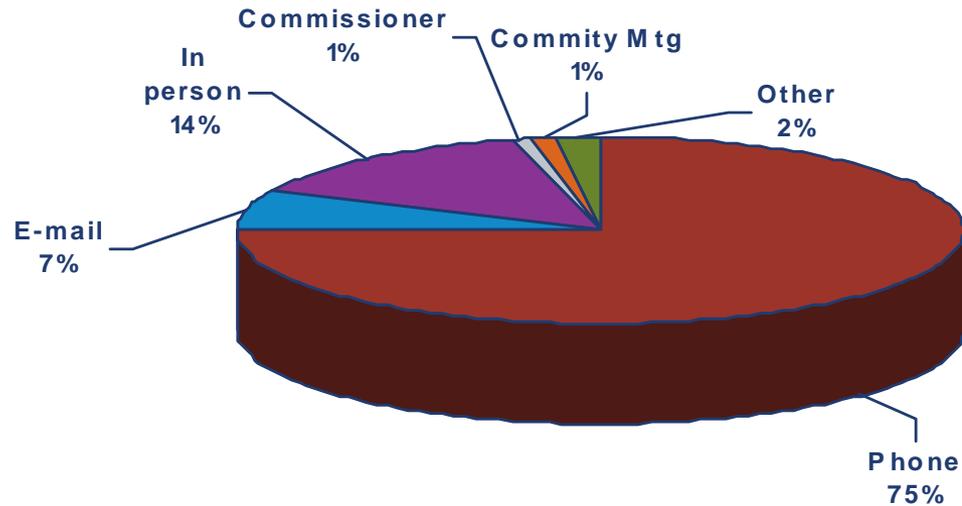
Contacted the City in the past 12 months



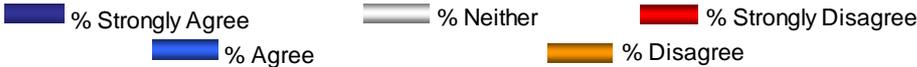
Reason for the contact



How did you first contact



Communications/Customer Service



vs. 2005
(% Fav)

vs. 2005
(% S. Agree)

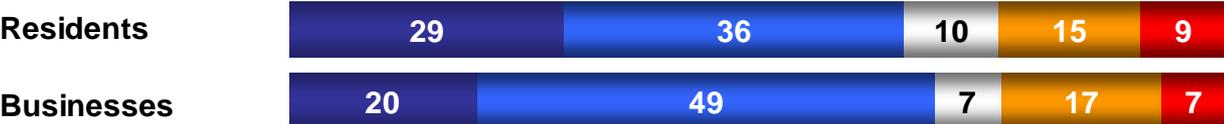
During my most recent contact with City government, it was easy to get to someone who could help me.



During my most recent contact with City government, the employees that assisted me were courteous and professional.



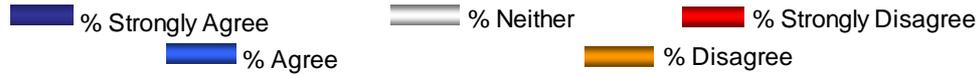
During my most recent contact with City government, the employees that assisted me had the proper training and knowledge.



During my most recent contact with City government, overall, I was satisfied with the experience I had contacting the City.



Customer Service (cont'd)



vs.
2005
(% Fav) (% S. Agree)
vs.
2005

Thinking about my most recent contact with City government, the process is user-friendly and easy to understand.



Thinking about my most recent contact with City government, the requests made by my business are processed in a timely manner.

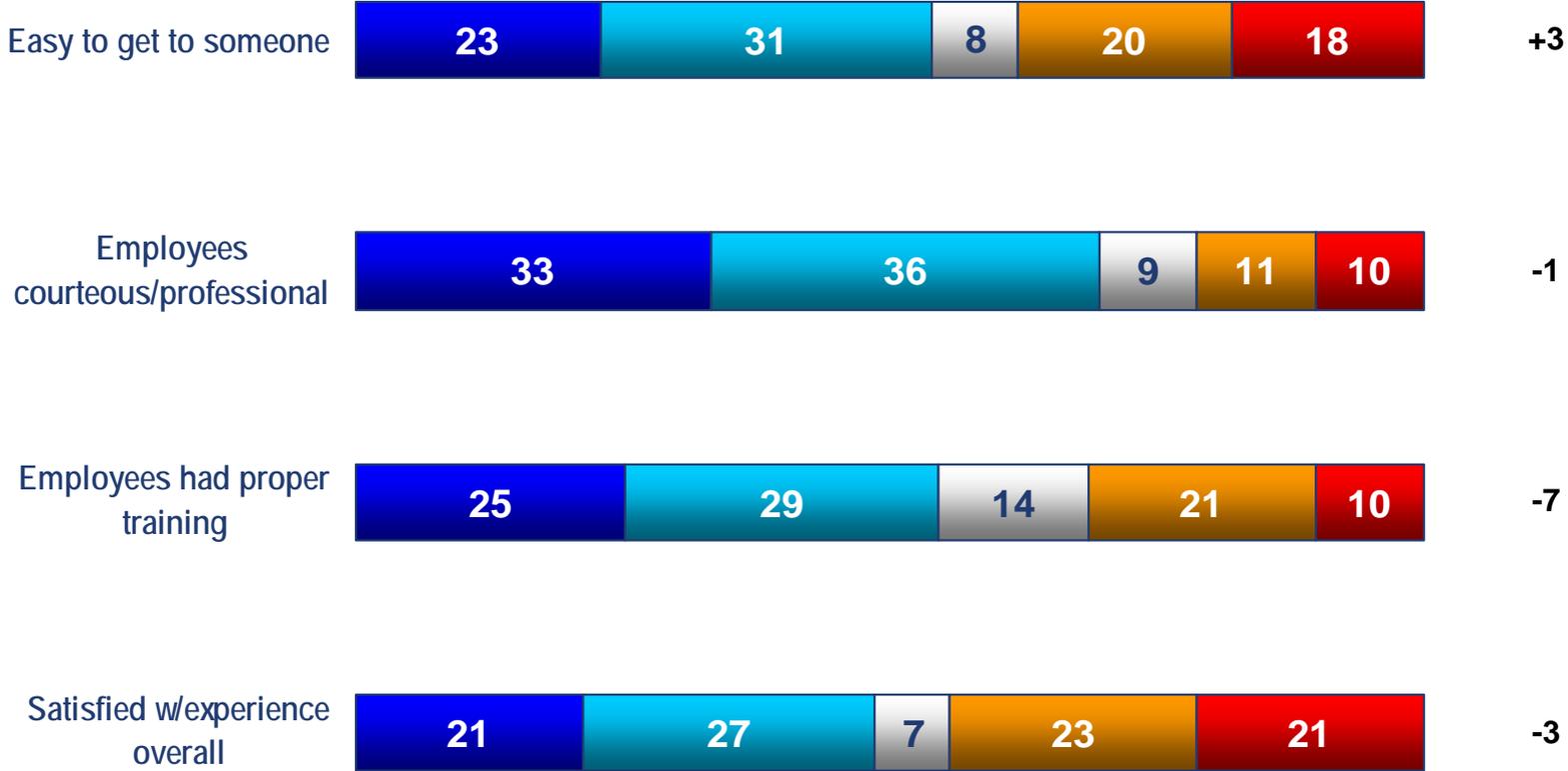


Customer Service (cont'd)

Regarding the most recent contact, do you agree or disagree with the following? [RESIDENTS – FILE A COMPLAINT]

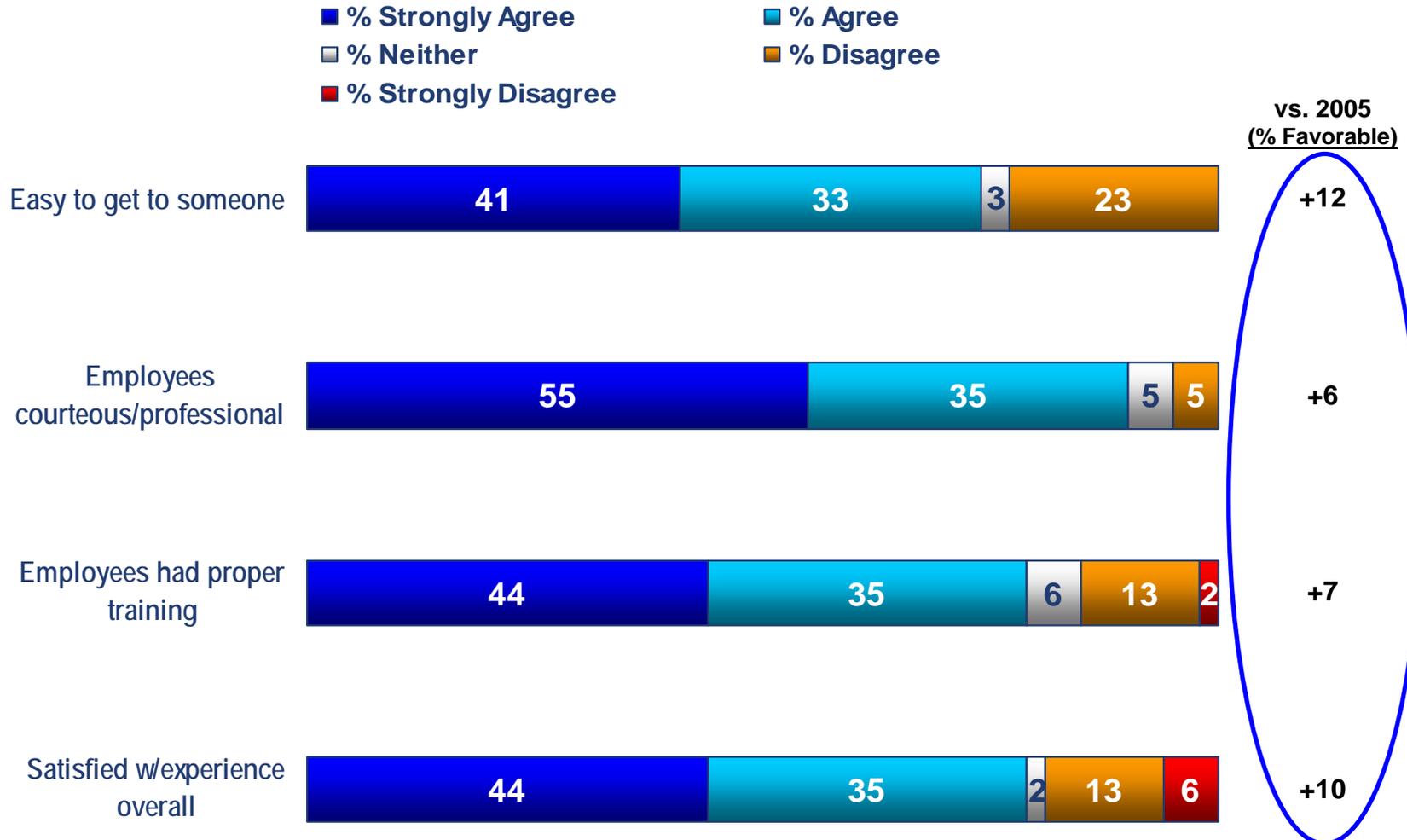


vs. 2005
(% Favorable)



Customer Service (cont'd)

Regarding the most recent contact, do you agree or disagree with the following? [RESIDENTS – RESEARCH AN ISSUE]

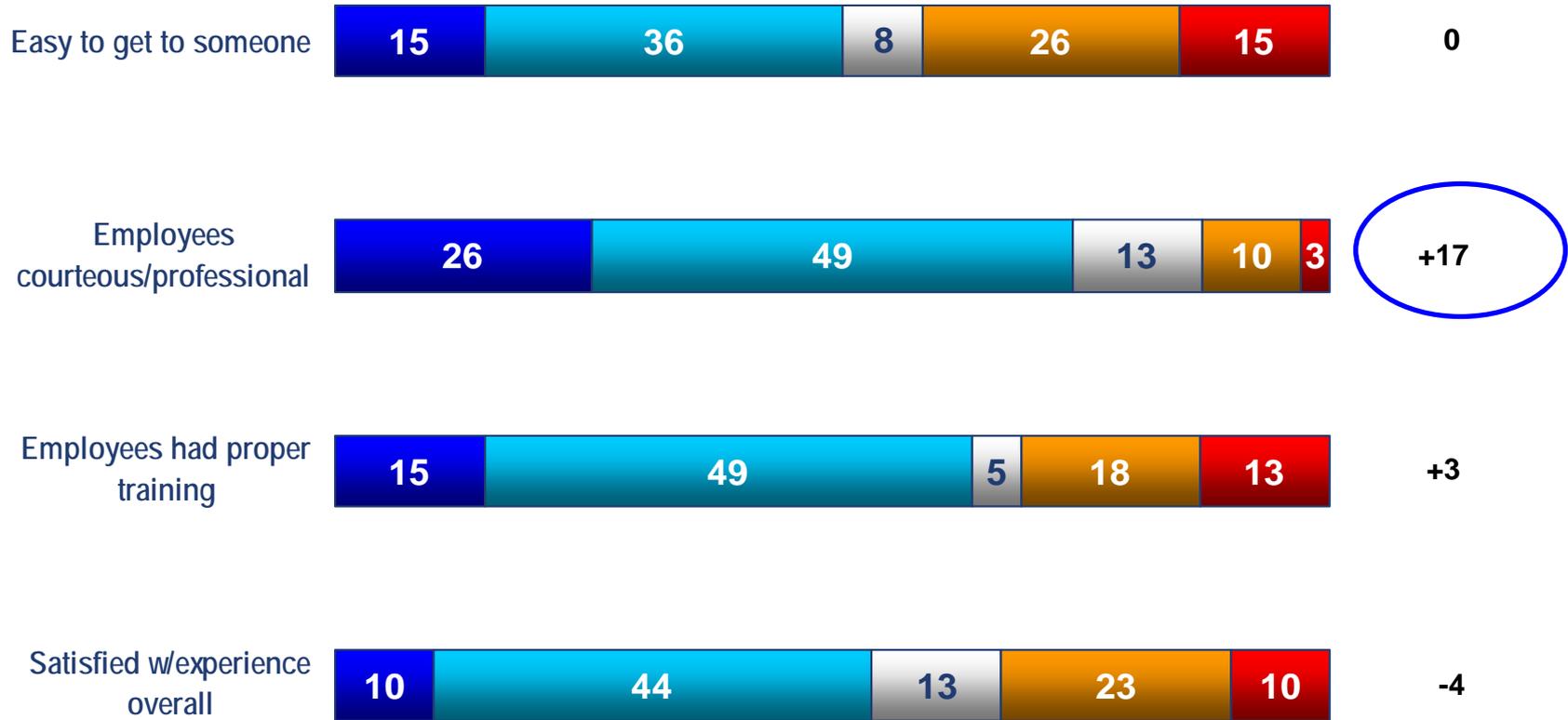


Customer Service (cont'd)

Regarding the most recent contact, do you agree or disagree with the following? [RESIDENTS – PULL A BUILDING PERMIT/PLAN REVIEW]

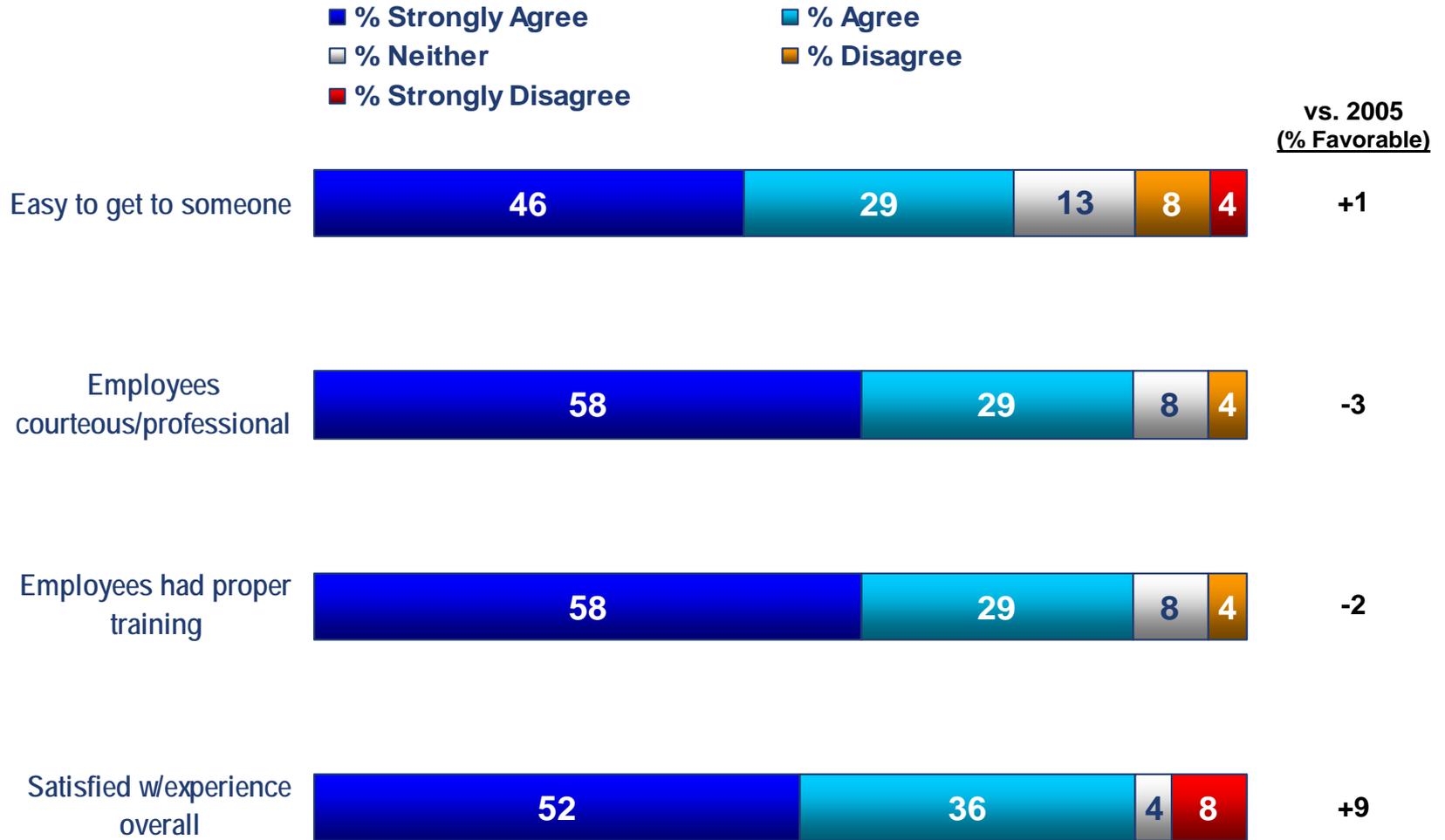
■ % Strongly Agree ■ % Agree
■ % Neither ■ % Disagree
■ % Strongly Disagree

vs. 2005
(% Favorable)



Customer Service (cont'd)

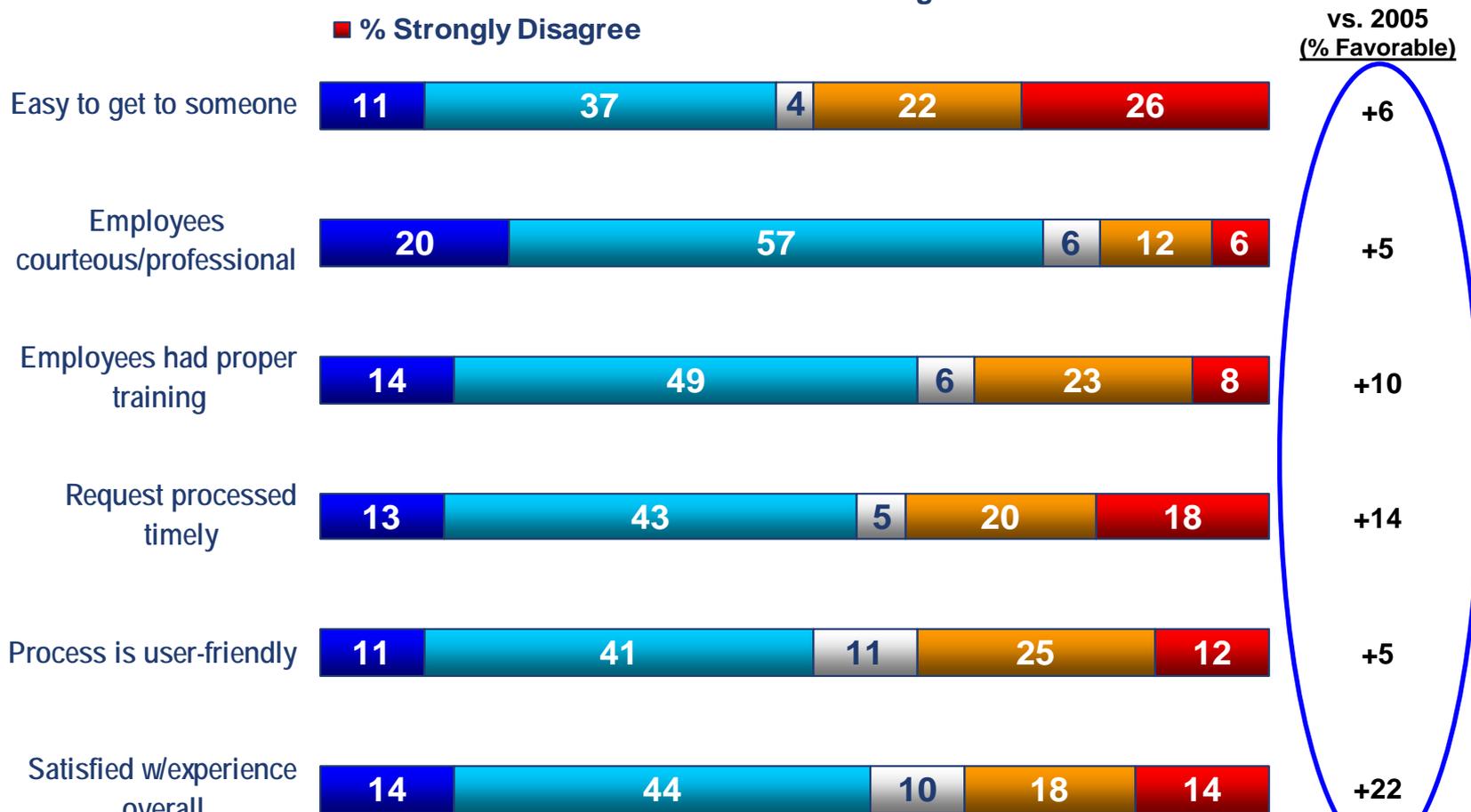
Regarding the most recent contact, do you agree or disagree with the following? [RESIDENTS – PAY A BILL]



Customer Service (cont'd)

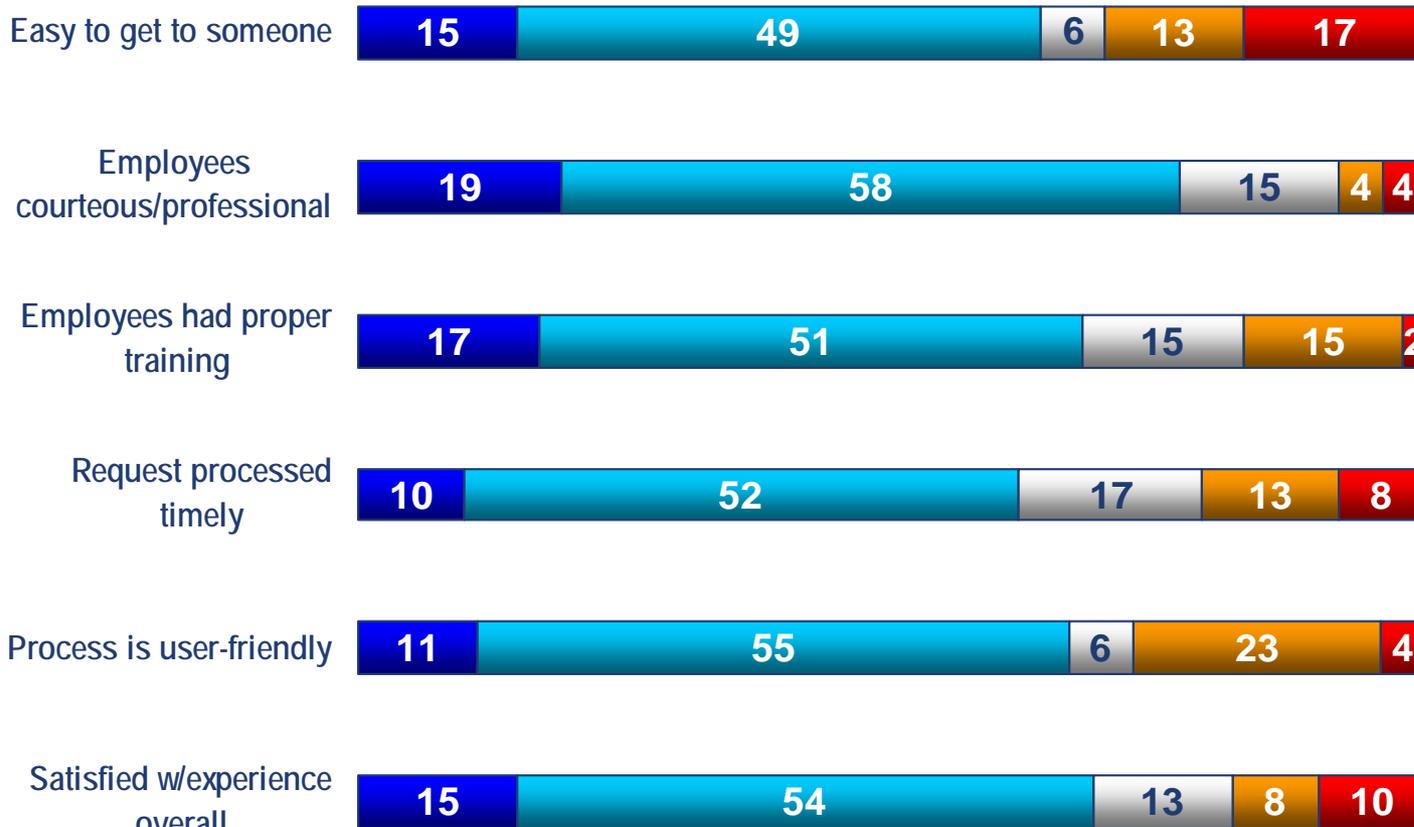
Regarding the most recent contact, do you agree or disagree with the following? **[BUSINESSES – FILE A COMPLAINT]**

■ % Strongly Agree ■ % Agree
■ % Neither ■ % Disagree
■ % Strongly Disagree



Customer Service (cont'd)

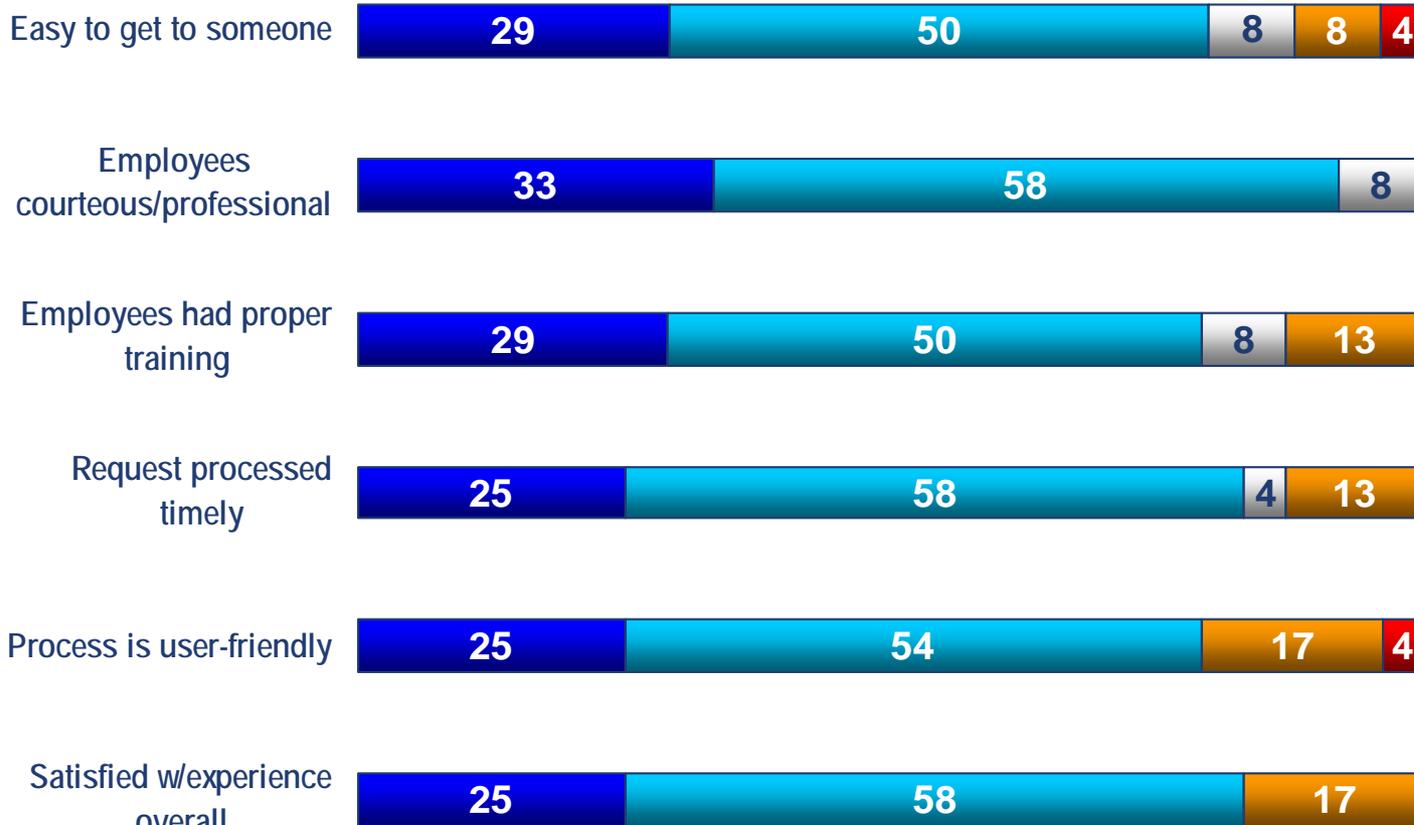
Regarding the most recent contact, do you agree or disagree with the following? **[BUSINESSES – RESEARCH AN ISSUE]**



Customer Service (cont'd)

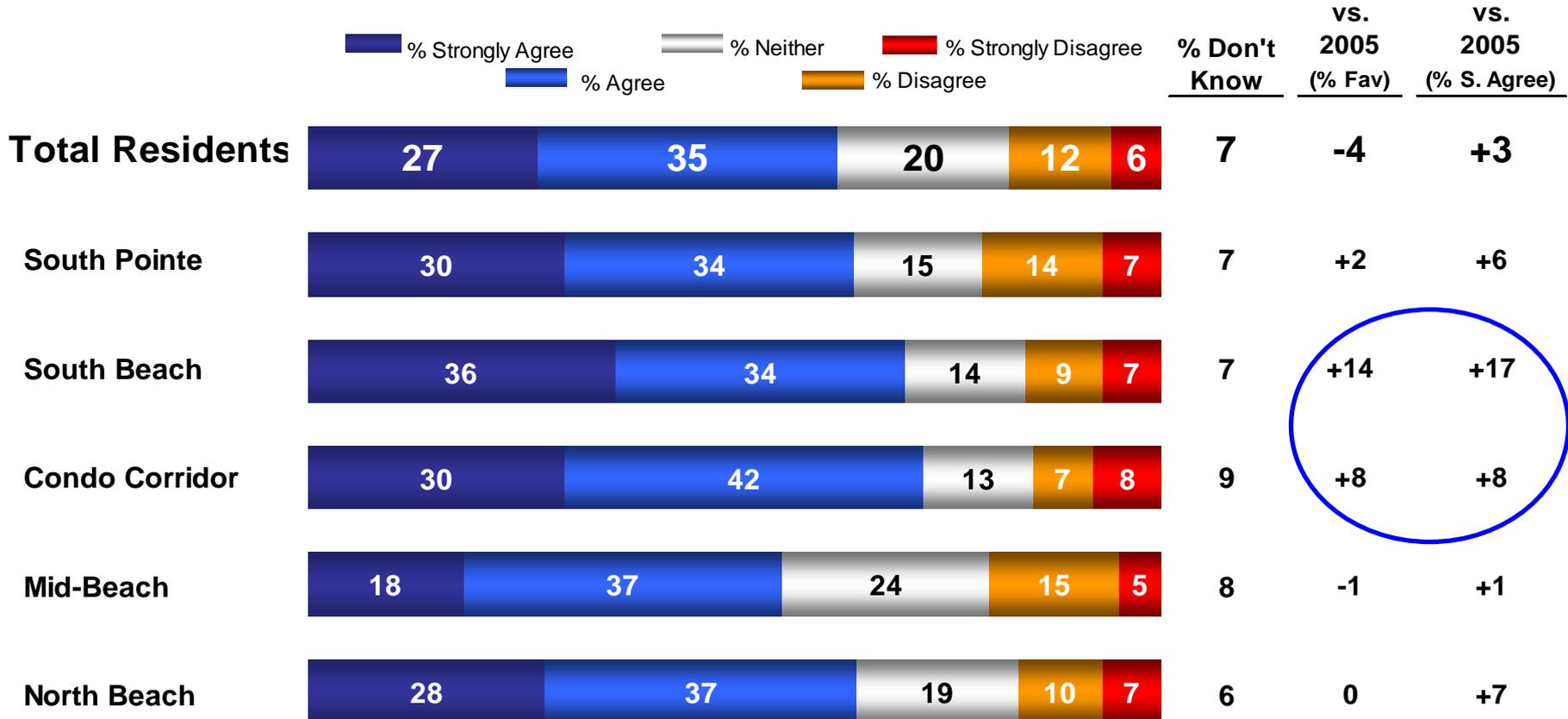
Regarding the most recent contact, do you agree or disagree with the following? **[BUSINESSES – PAY A BILL]**

■ % Strongly Agree ■ % Agree
■ % Neither ■ % Disagree
■ % Strongly Disagree



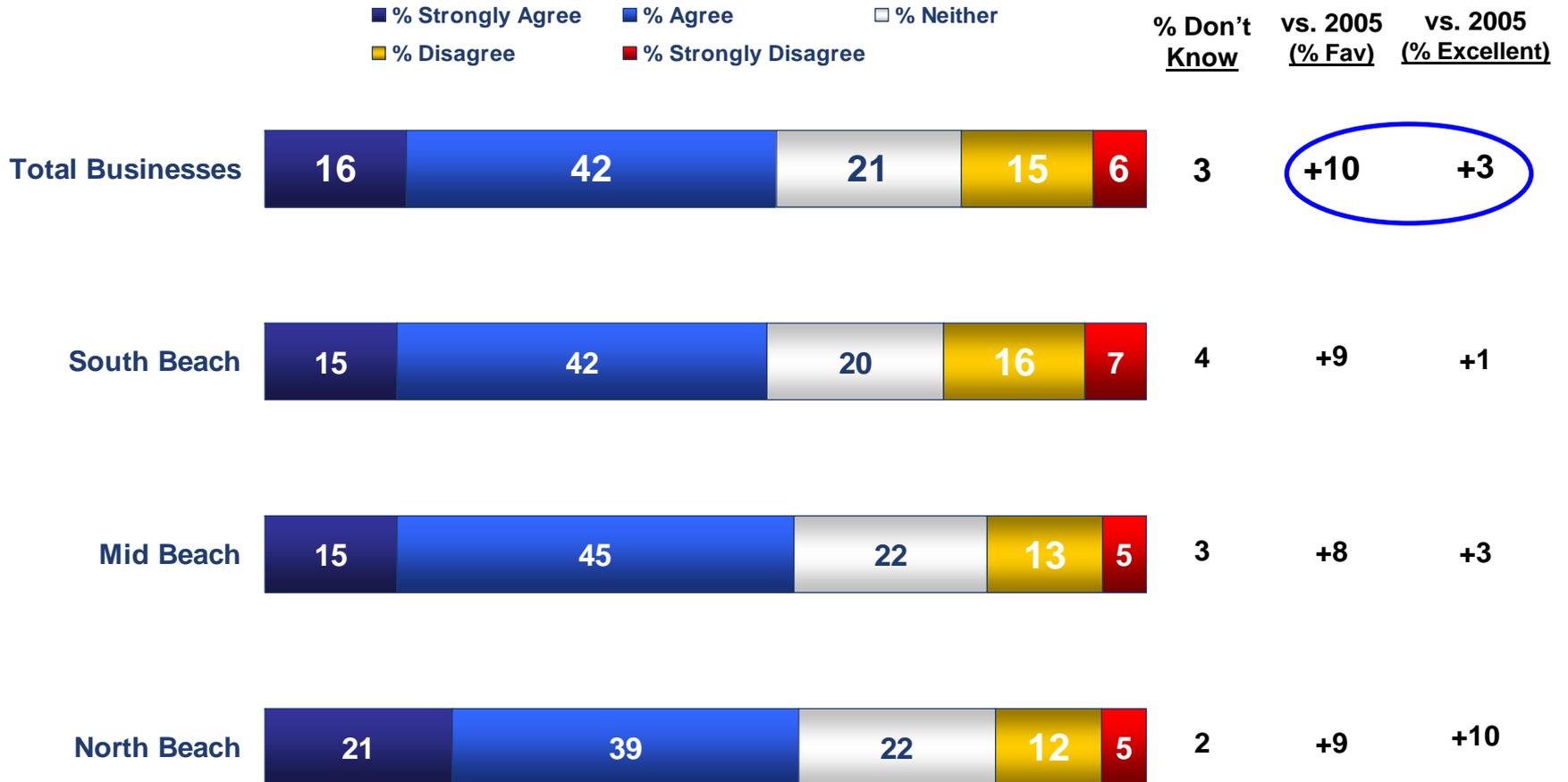
Communications/Customer Service

The City of Miami Beach government is open and interested in hearing the concerns or issues of residents.



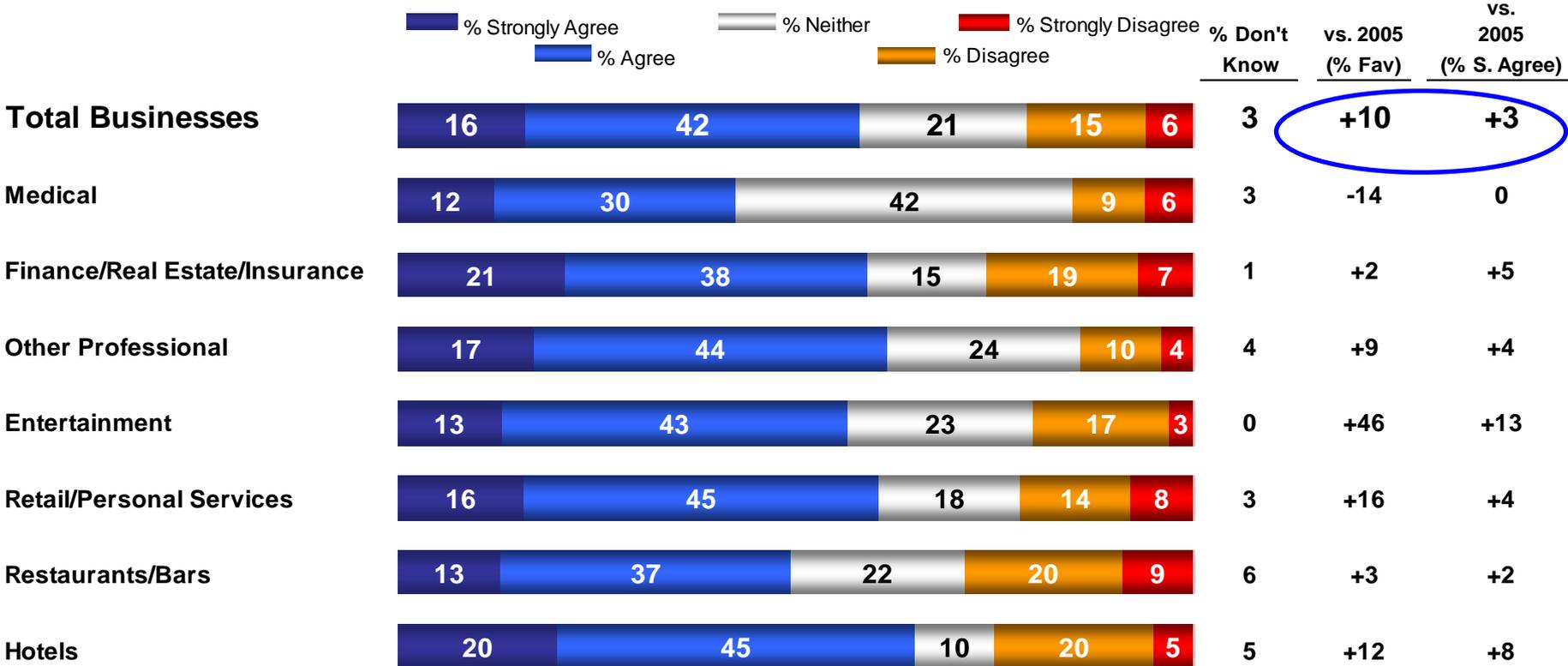
Communications/Customer Service

The City of Miami Beach government is open and interested in hearing the concerns or issues of your business.



Communications/Customer Service

The City of Miami Beach government is open and interested in hearing the concerns or issues of your business.



Building Department

■ %Yes

■ % No

% Don't Know

Have you contacted or had any direct experience with the City of Miami Beach Building Department in the past 12 months?



■ % Excellent

■ % Good

■ % Fair

■ % Poor

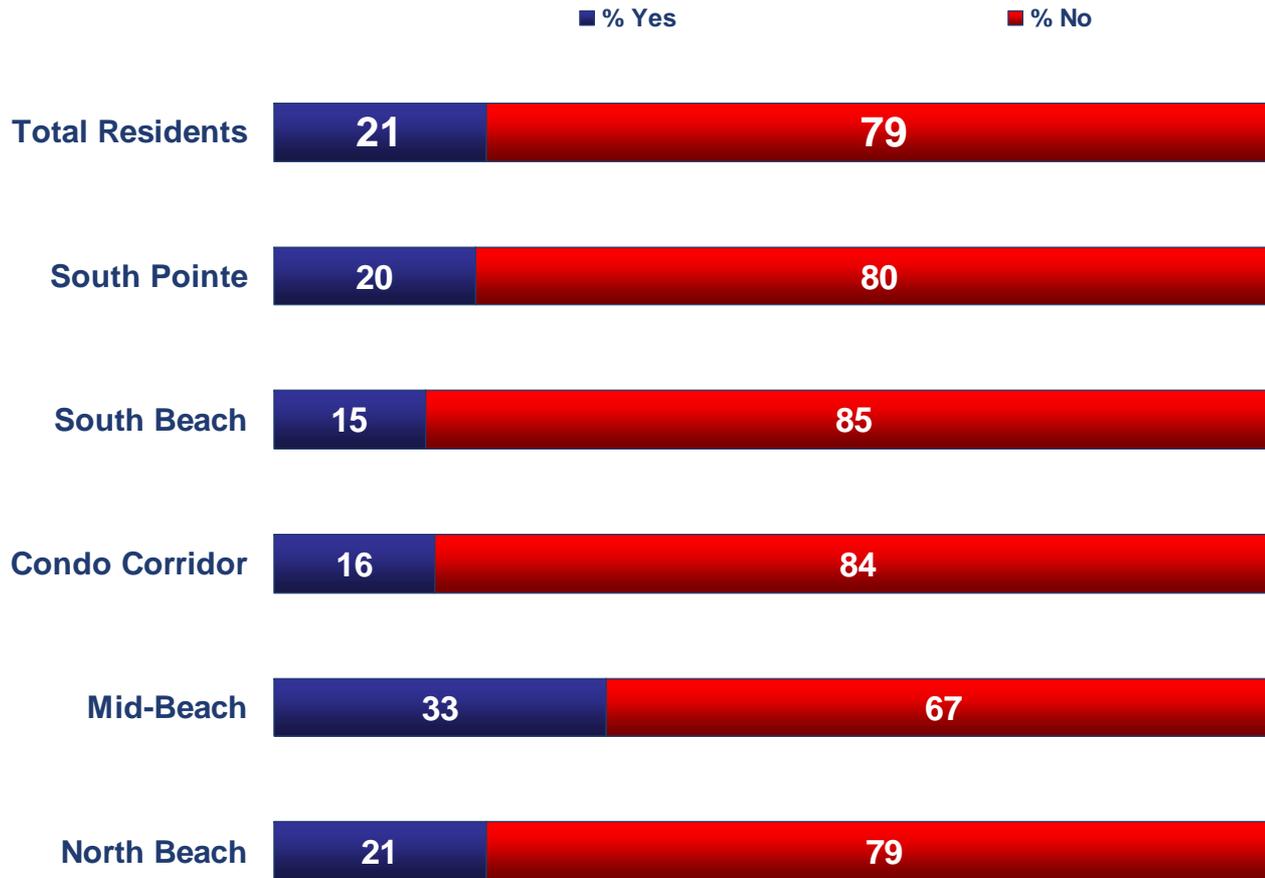
% Don't Know

Rate your experience with the Building Department.



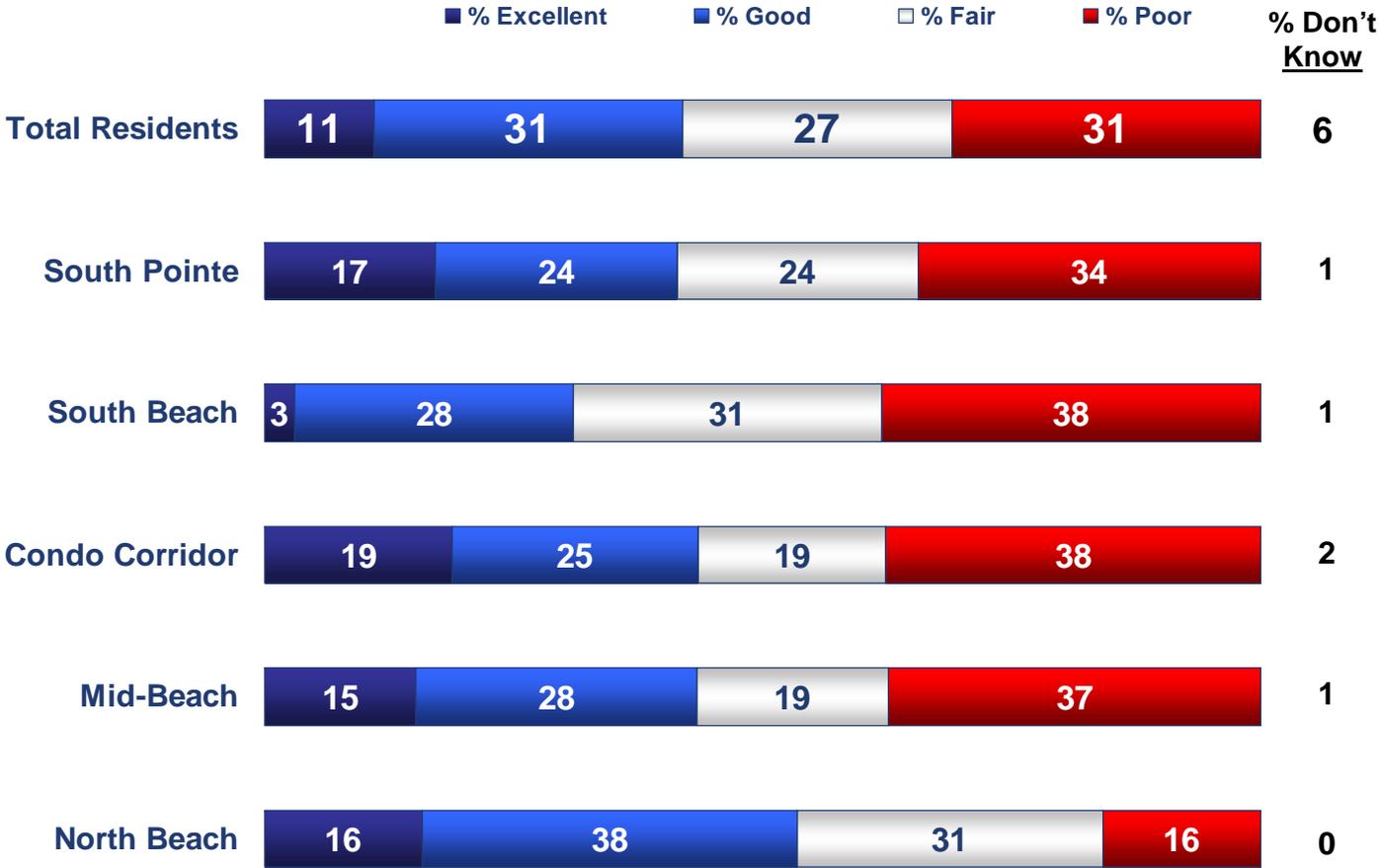
Building Department – Residents

Have you contacted or had any direct experience with the City of Miami Beach Building Department in the past 12 months?



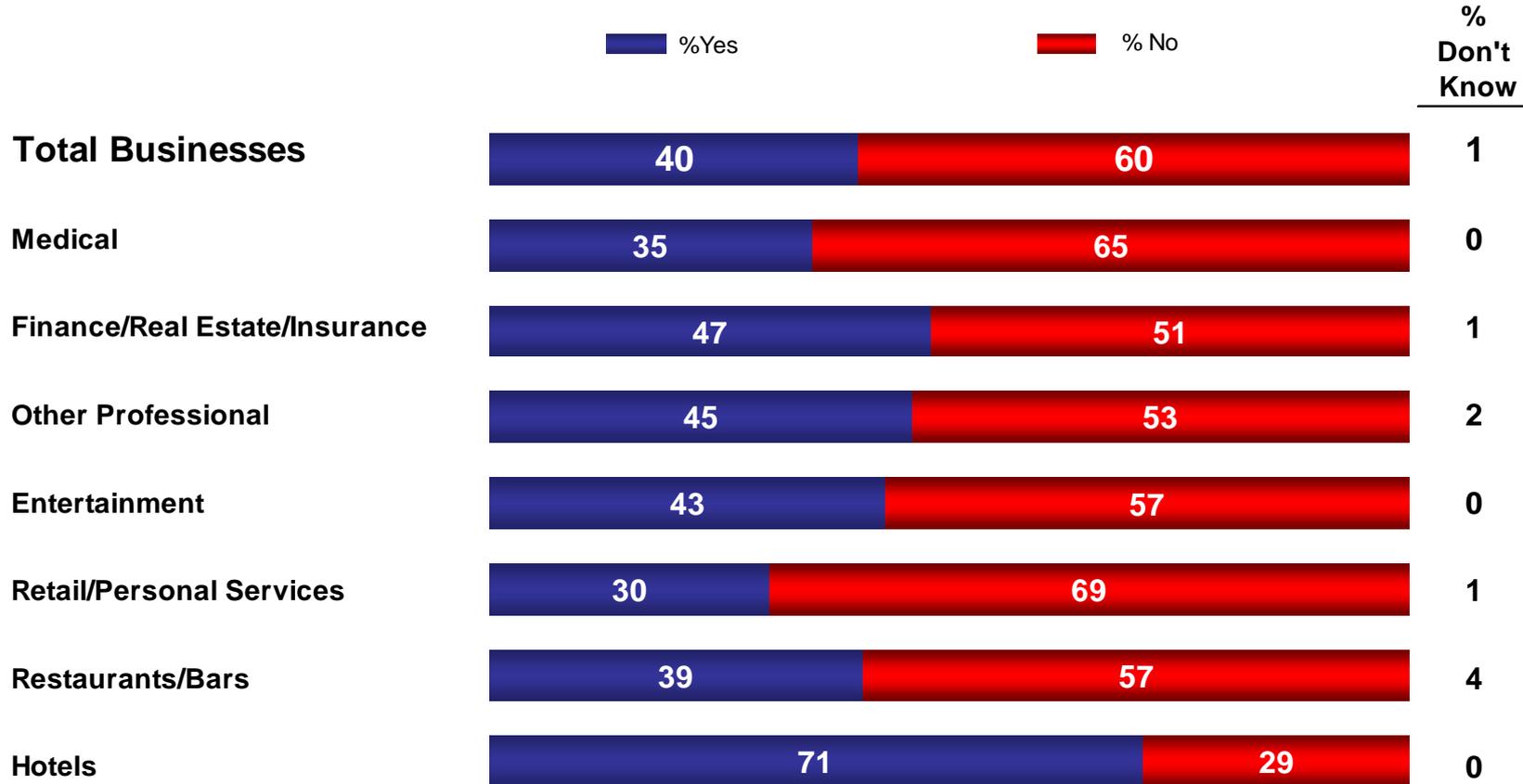
City Services (cont'd) – Residents

Rate your experience with the Building Department



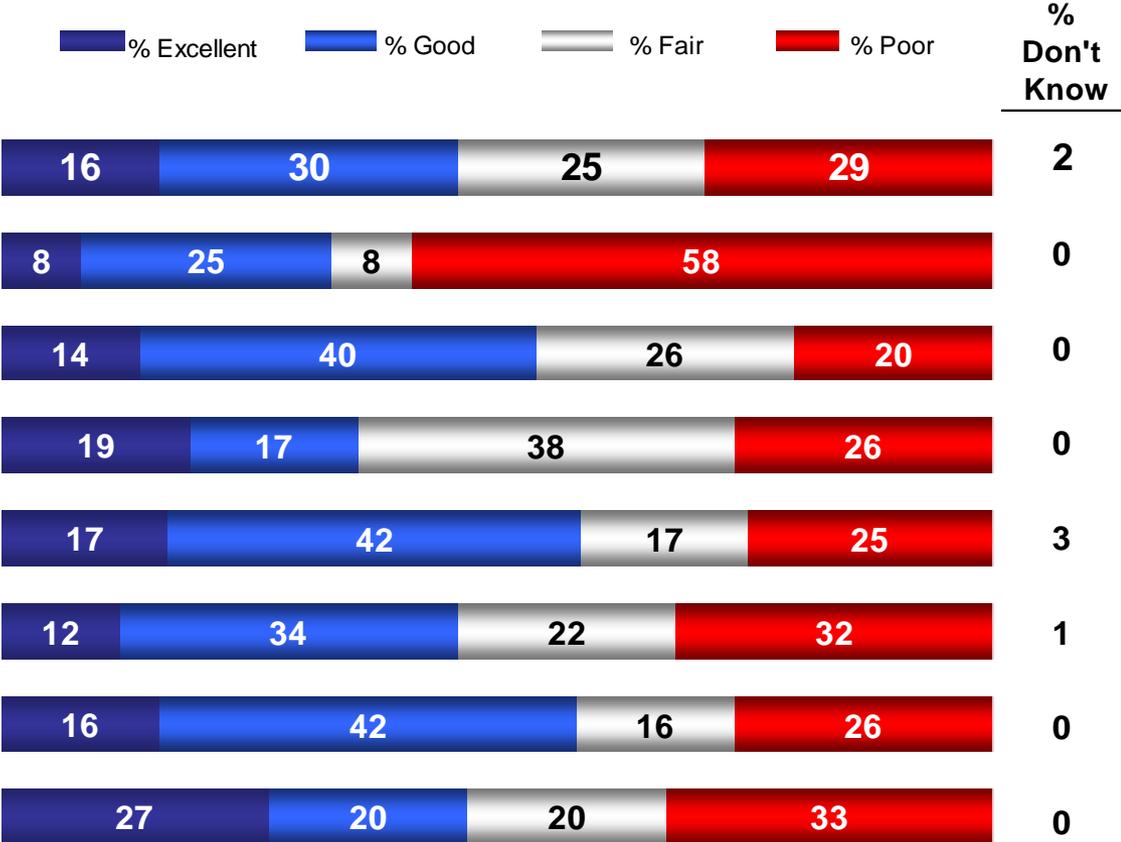
Building Department (cont'd)

Have you contacted or had any direct experience with the City of Miami Beach Building Department in the past 12 months?



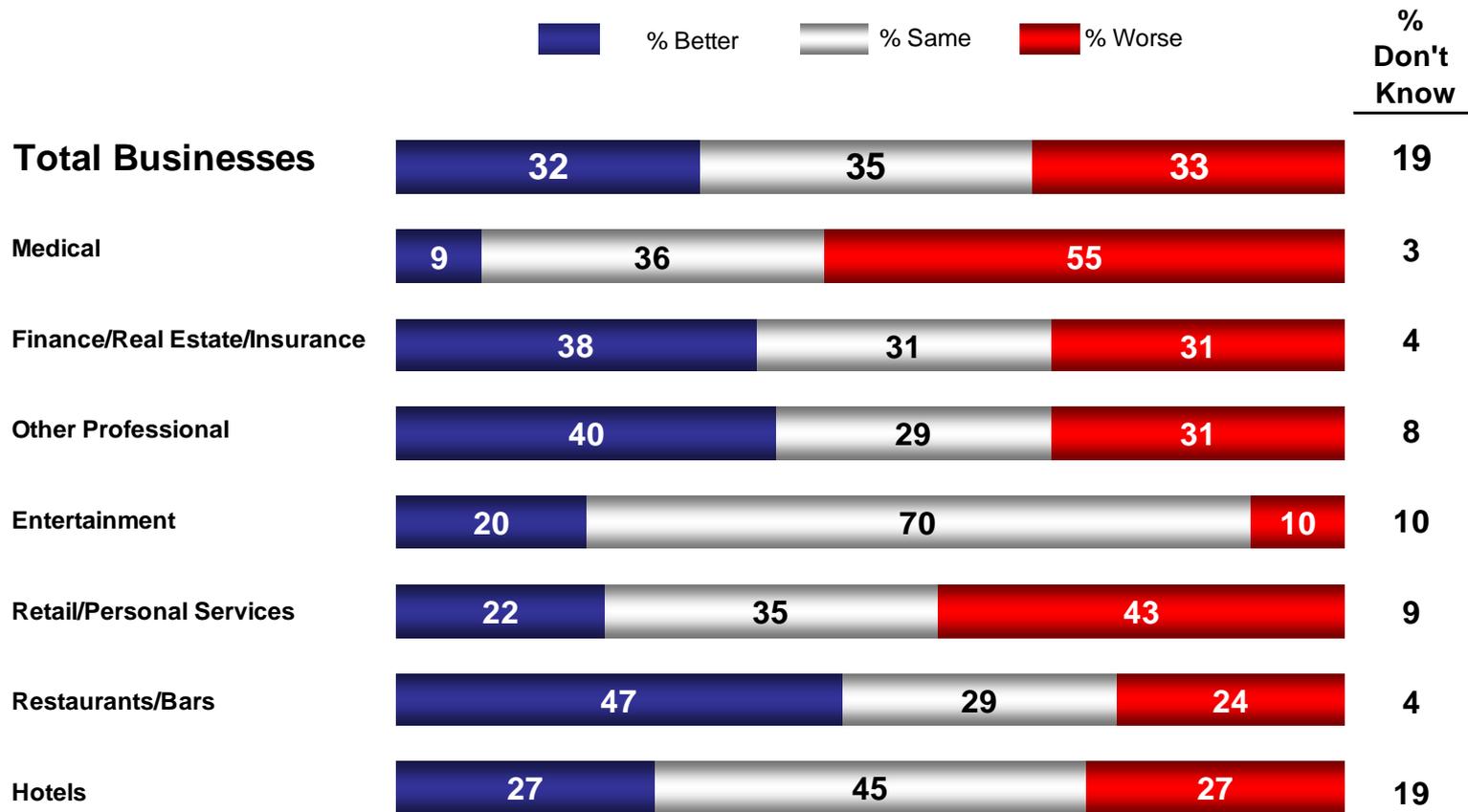
Building Department (cont'd)

Rate your experience with the Building Department.



Building Department (cont'd)

Rate dealing with the Building Department now compared with a few years ago.



Building Department (cont'd)

What is the most important thing the City can do to improve the Building Department?

<u>Theme</u>	<u>Residents</u>	<u>Businesses</u>
<ul style="list-style-type: none"> ■ Faster permit/inspection approval process <ul style="list-style-type: none"> – “Be quicker with permits, construction is too slow.” 	32%	32%
<ul style="list-style-type: none"> ■ Less bureaucracy/red tape <ul style="list-style-type: none"> – “Not be so bureaucratic. It took forever to get my roof fixed.” 	30%	28%
<ul style="list-style-type: none"> ■ Hire, and provide better training to, staff <ul style="list-style-type: none"> – “They need more staff and then people wouldn’t have to wait for hours.” 	16%	20%
<ul style="list-style-type: none"> ■ Improve courteousness/attitude of staff <ul style="list-style-type: none"> – “Better training with their employee politeness. Had a horrible experience.” 	10%	8%
<ul style="list-style-type: none"> ■ Eliminate answering machine <ul style="list-style-type: none"> – “Get rid of phone machine & let me speak to a human.” 	5%	8%
<ul style="list-style-type: none"> ■ Better communication <ul style="list-style-type: none"> – “I find (there is) a lack of information about the building code itself.” 	4%	3%
<ul style="list-style-type: none"> ■ Eliminate corruption/bribery of inspectors <ul style="list-style-type: none"> – “There was one guy who was really rude to us but he was arrested for bribery charges.” 	3%	1%

Communications/Customer Service – Resident Normative Comparison*

Similar Cities

Question	City of Miami Beach Rating	Rank	Number of Jurisdictions	City of Miami Beach Percentile	Comparison to Norm	Vs. 2005 Comparison to Norm
City employee – courteous and professional	74	2	8	88%	Above norm	No change
City government listens to residents	66	1	9	100%	Above norm	No change
City employee – training and knowledge	65	5	10	60%	Similar to norm	No change
City employee – overall experience	61	7	14	57%	Similar to norm	No change

Florida Only

City employee – courteous and professional	74	6	18	72%	Above norm	Improved
City government listens to residents	66	3	17	88%	Above norm	No change
City employee – training and knowledge	65	12	18	39%	Below norm	Declined
City employee – overall experience	61	17	23	30%	Below norm	Declined

*Comparative citizen opinions came from the National Research Center, Inc. database of citizen survey results

Communications/Customer Service – Resident Normative Comparison*

Population bet. 70,000 to 100,000 Norms

Question	City of Miami Beach Rating	Rank	Number of Jurisdictions	City of Miami Beach Percentile	Comparison to Norm	Vs. 2005 Comparison to Norm
City employee – courteous and professional	74	4	14	79%	Above norm	Improved
City government listens to residents	66	6	16	69%	Above norm	No change
City employee – training and knowledge	65	17	18	11%	Below norm	Declined
City employee – overall experience	61	16	18	17%	Below norm	Declined

All Jurisdictions

City employee – courteous and professional	74	40	125	69%	Above norm	Improved
City government listens to residents	66	46	147	69%	Above norm	No change
City employee – training and knowledge	65	128	165	23%	Below norm	Declined
City employee – overall experience	61	159	198	20%	Below norm	No change

*Comparative citizen opinions came from the National Research Center, Inc. database of citizen survey results

Communications/Customer Service – In Sum

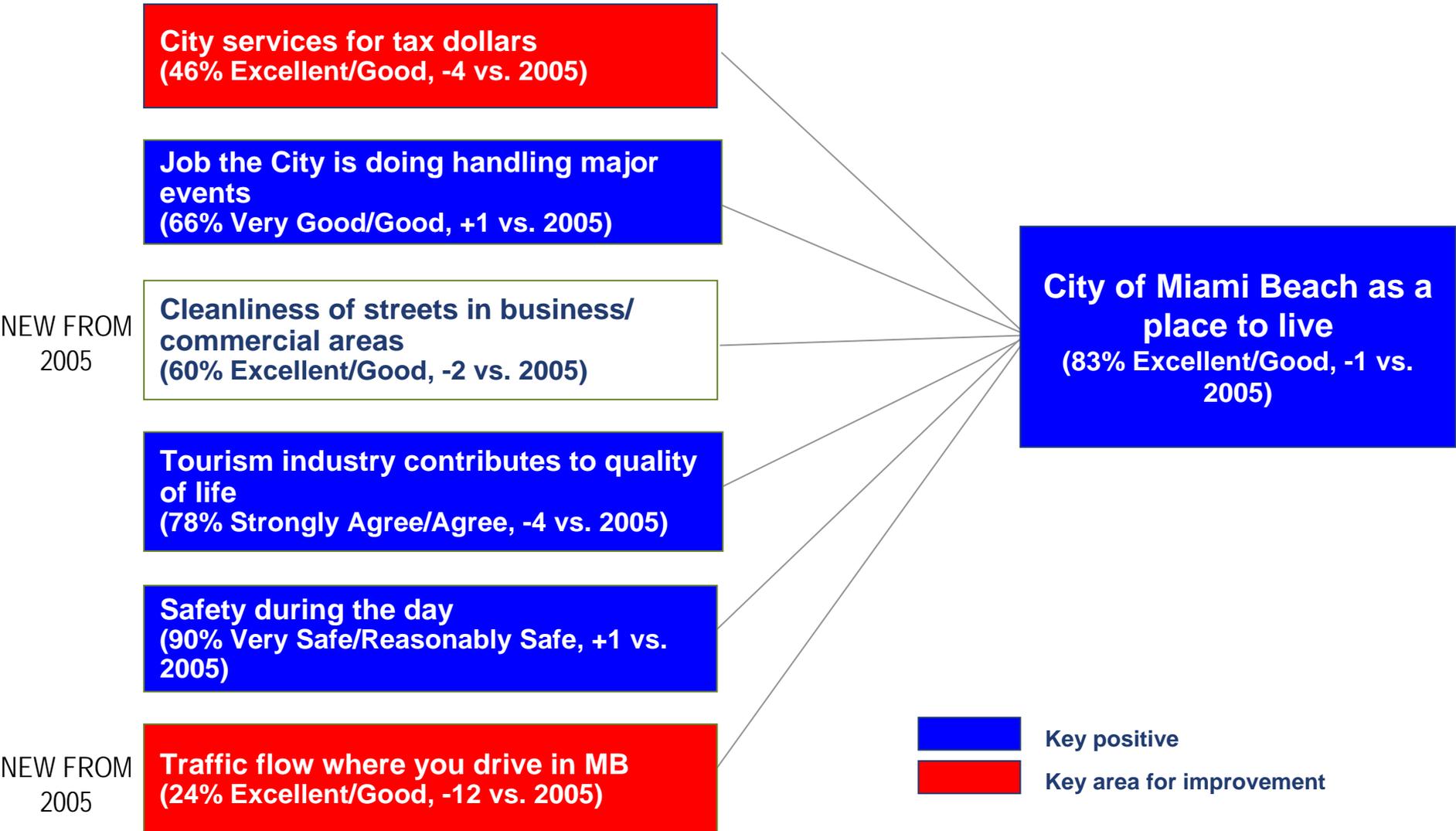
- About ¼ of residents and businesses get their information about the City from daily newspapers
- 11% of residents and 14% of business get most of their information from CityPage
- More people this year report getting information directly from the Miami Beach website
- 15% of residents and 6% of businesses get information from MB Magazine (a good percentage)
- When getting information directly from the City (Commission, MB Magazine, website, etc.) versus through non-City sources, residents and businesses are more satisfied with the amount of information they are getting
 - Residents who get information from MB Magazine are the most satisfied with amount of information they get about the City
 - Businesses who get information from the City Commission and MB Website are most satisfied with amount of information they get about the City
- Amount of contact with the City varies by group – 34% of residents have contacted the City at least once in the past 6 months, while 62% of Businesses have contacted at least once in the past year
 - Residents and Businesses most often contacted to file a complaint and do so usually via phone
- Regardless of the reason for contact, residents give high ratings to City employees for their professionalism/courteousness during the contact – having the proper training to address their issue/question often more mixed and below norm

Communications/Customer Service – In Sum

- Also more lukewarm ratings about being able to get to the right person who can help and their overall satisfaction with the contact (the latter though generally below norm)
- For all City employee contact questions, results improved from 2005 for both residents and businesses
- Mixed to unfavorable results regarding contact with the Building Department
 - Around a third of residents and business dissatisfied with the experience
 - Mixed results as to whether dealing with the Building Department is better, the same or worse now than a few years ago – a fairly similar distribution for each response
 - Biggest areas to address are to have a faster turnaround permit process, decrease/eliminate bureaucracy, and having courteous, trained and adequate number of staff to handle issues
- Clear majority (62% of residents and 58% of businesses) say that City government is open and interested in hearing their concerns and issues – results above all normative comparisons

***Key Drivers of Community
Satisfaction***

Key Drivers – Residents



Key Drivers – Residents

Job the City is doing handling major events
 (66% Very Good/Good, +1 vs. 2005)

Tourism industry contributes to quality of life
 (78% Strongly Agree/Agree, -4 vs. 2005)

City services for tax dollars
 (46% Excellent/Good, -4 vs. 2005)

Traffic flow where you drive in MB
 (24% Excellent/Good, -12 vs. 2005)

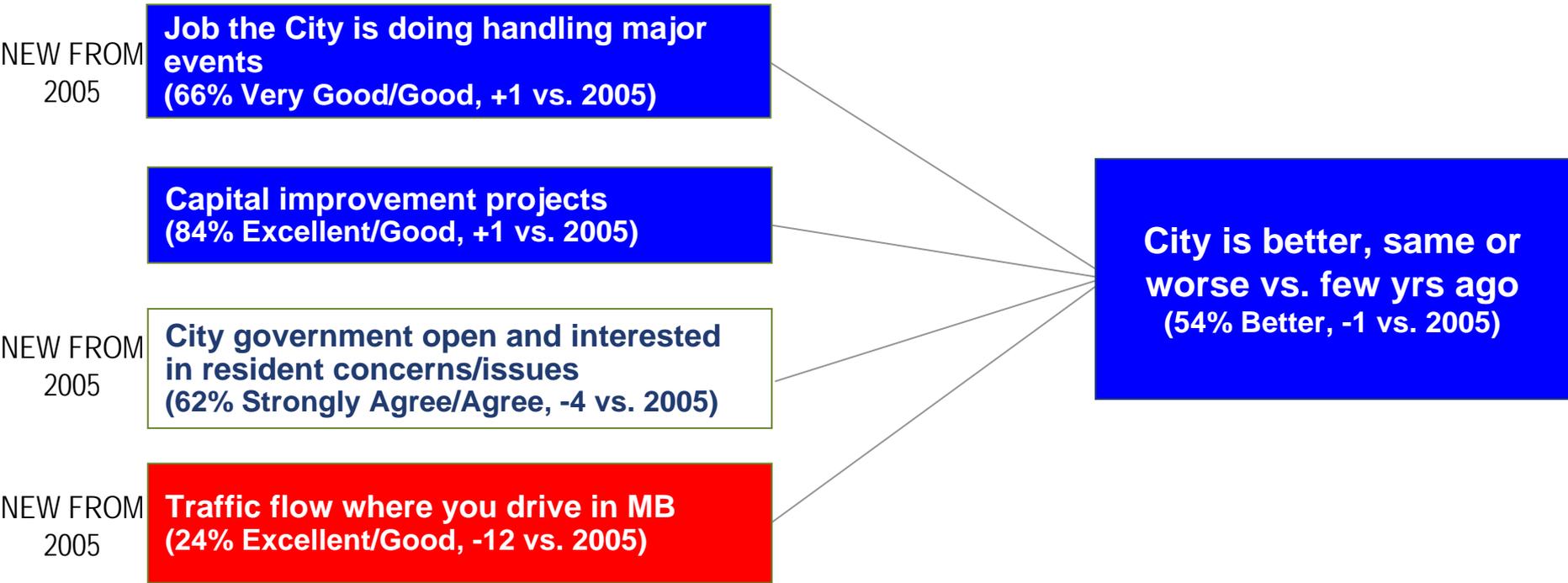
Cleanliness of streets in business/commercial areas
 (60% Excellent/Good, -2 vs. 2005)

City government open and interested in resident concerns/issues
 (62% Strongly Agree/Agree, -4 vs. 2005)

Recommend Miami Beach as a place to live
 (76% Yes, definitely or Yes, probably)



Key Drivers – Residents



Key positive

Key area for improvement

Key Drivers – Residents

City services for tax dollars
(46% Excellent/Good, -4 vs. 2005)

City government open and interested in resident concerns/issues
(62% Strongly Agree/Agree, -4 vs. 2005)

Job the City is doing handling major events
(66% Very Good/Good, +1 vs. 2005)

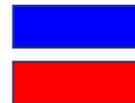
Condition of roads (repair, smoothness)
(48% Excellent/Good, +1 vs. 2005)

Fairness/consistency in code enforcement
(61% Very Satisfied/Satisfied)

Miami Beach government meeting your needs
(61% Excellent/Good, -5 vs. 2005)

NEW FROM 2005

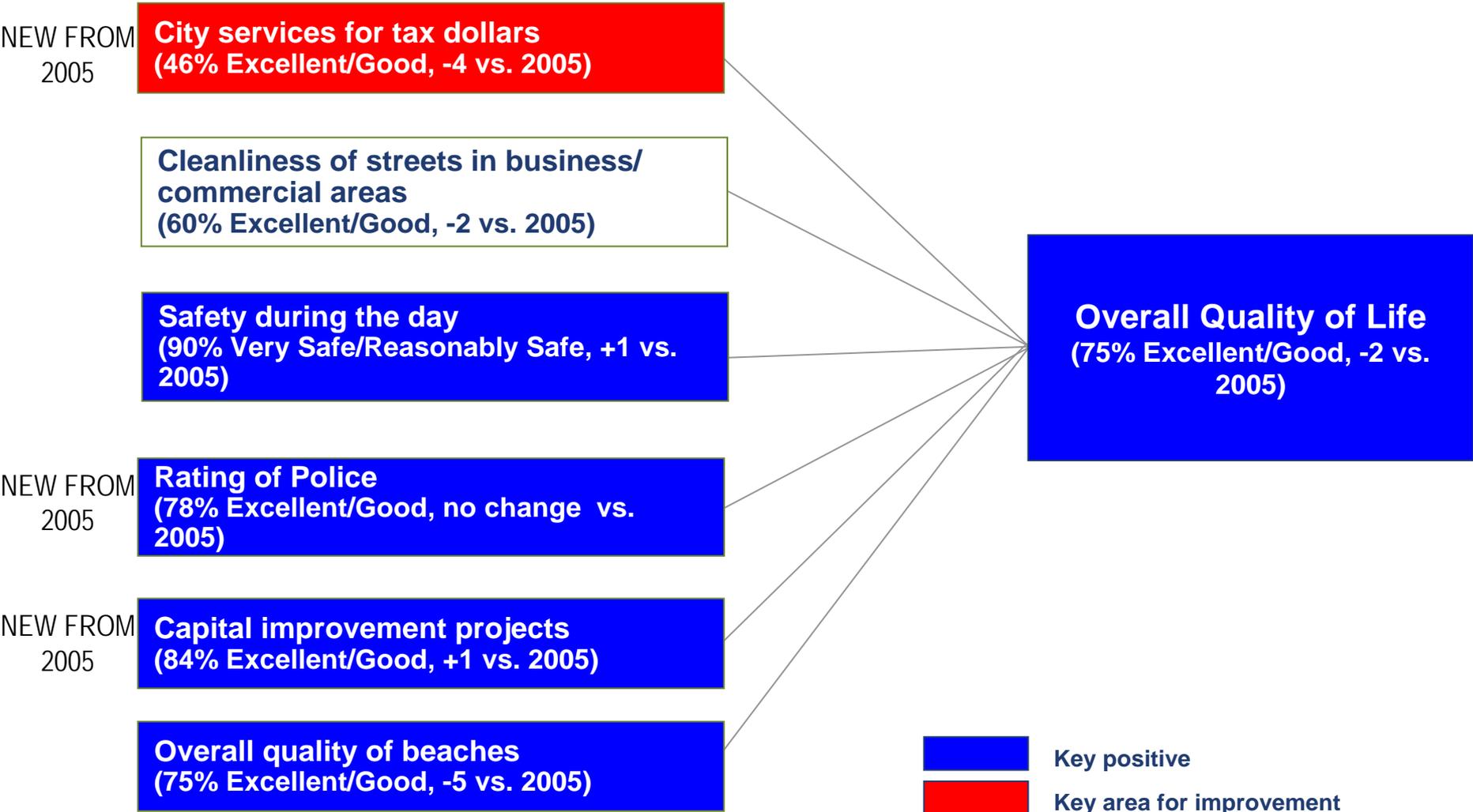
NEW FROM 2005



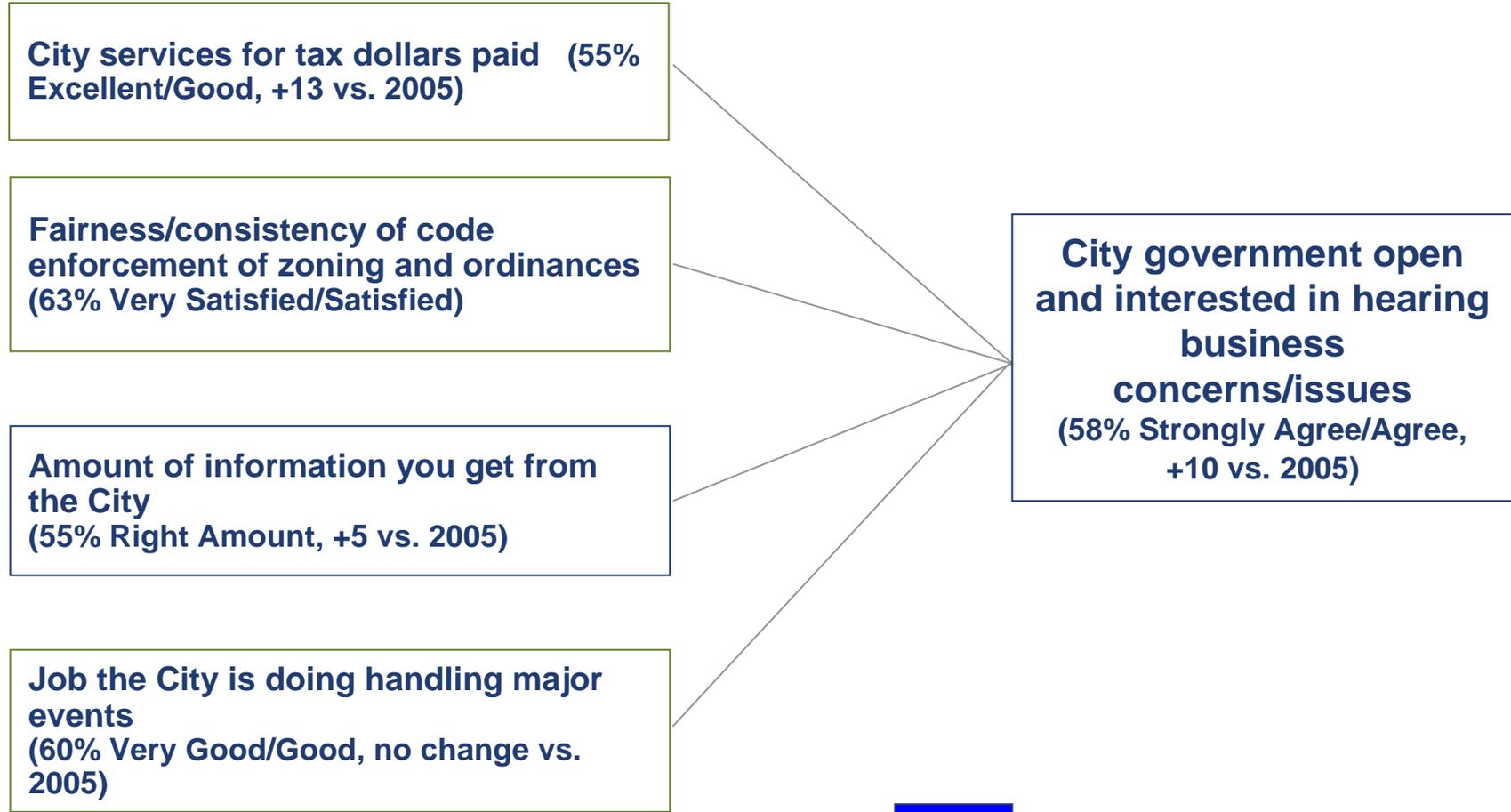
Key positive

Key area for improvement

Key Drivers – Residents

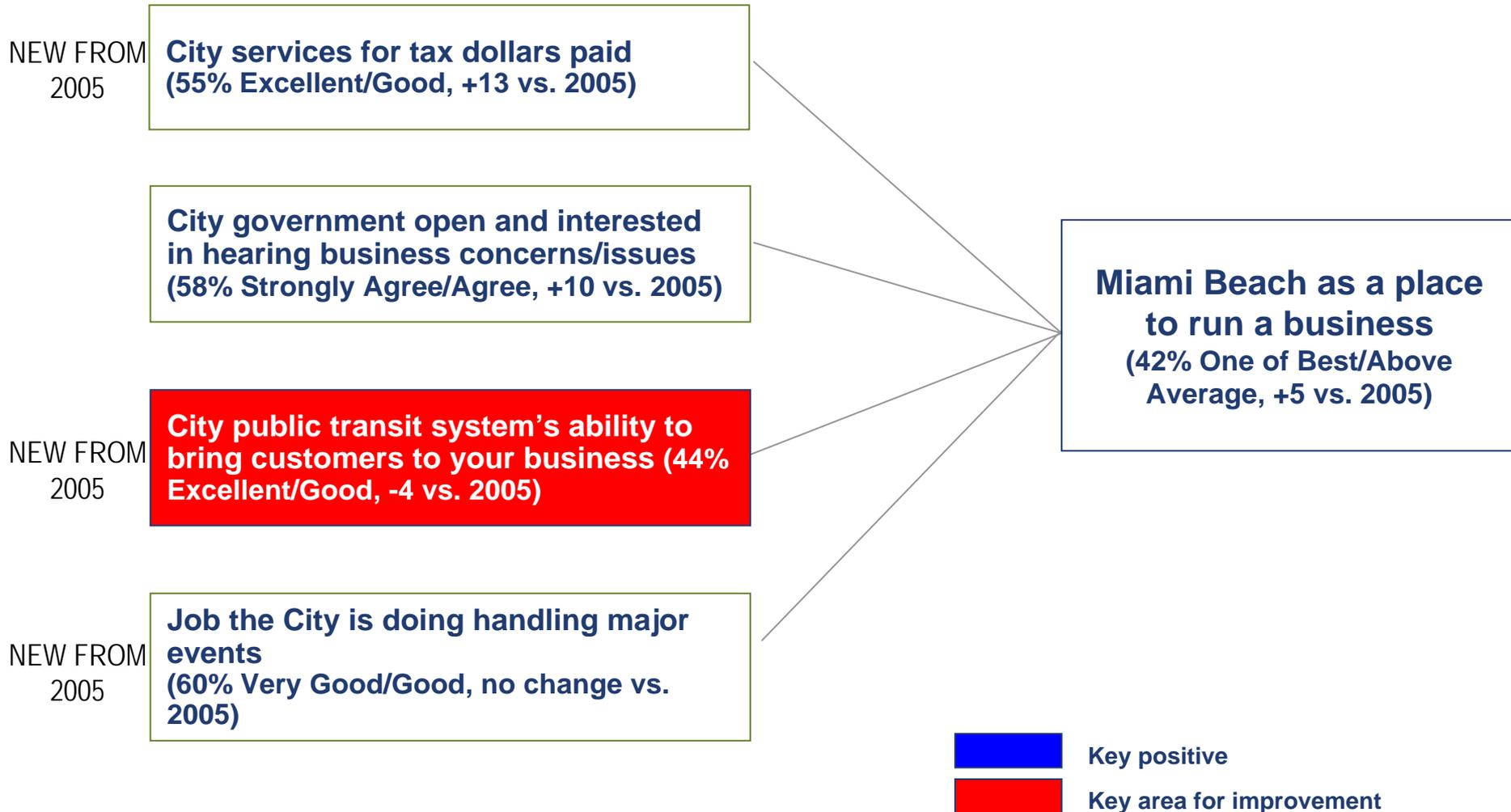


Key Drivers – Businesses

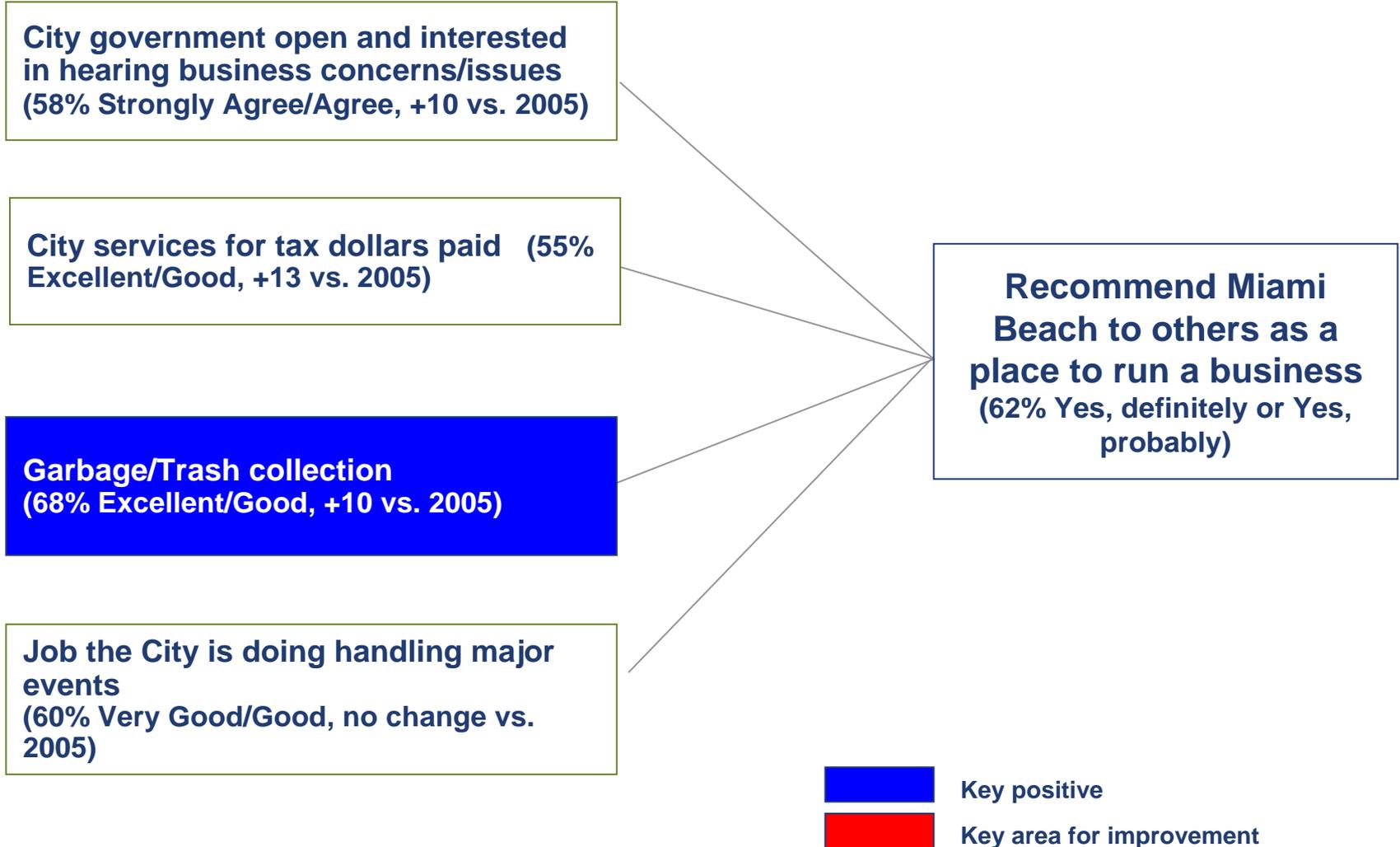


 Key positive
 Key area for improvement

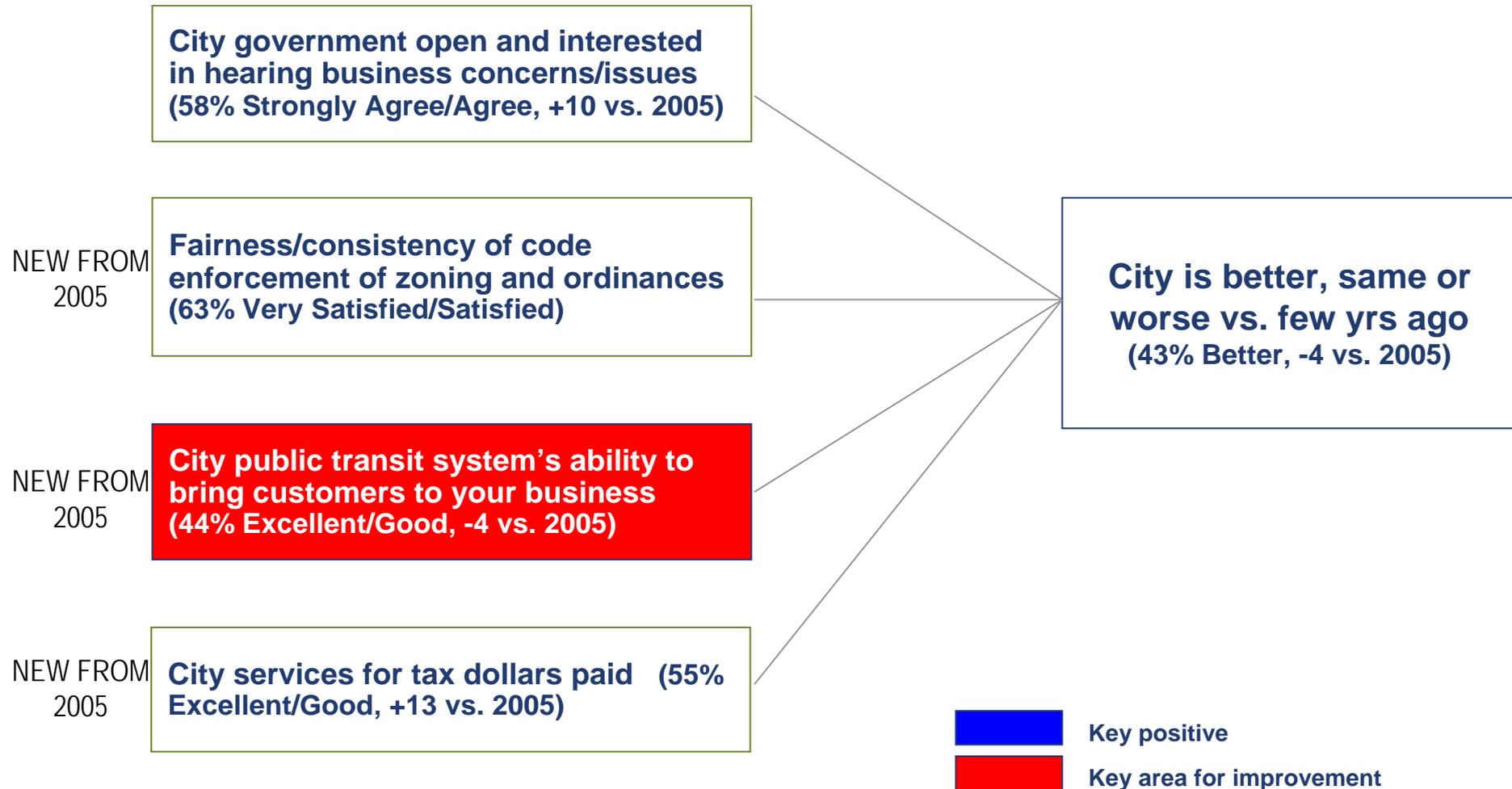
Key Drivers – Businesses



Key Drivers – Businesses



Key Drivers – Businesses



Key Drivers – Businesses

City government open and interested in hearing business concerns/issues (58% Strongly Agree/Agree, +10 vs. 2005)

City services for tax dollars paid (55% Excellent/Good, +13 vs. 2005)

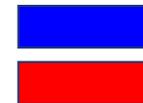
NEW FROM 2005
City public transit system's ability to bring customers to your business (44% Excellent/Good, -4 vs. 2005)

NEW FROM 2005
City residents are key contributors to business viability (71% Strongly Agree/Agree, -1 vs. 2005)

Traffic flow for customers and employees to get to business (28% Excellent/Good, +3 vs. 2005)

NEW FROM 2005
Storm drainage (37% Excellent/Good, -1 vs. 2005)

Miami Beach government meeting the needs of your business (58% Excellent/Good, +16 vs. 2005)



Key positive

Key area for improvement

Key Drivers...In Sum

■ Residents

- City services (especially cleanliness of business streets, beaches, etc.) and safety (during the day, police) key factors that drive several outcome measures
 - Note: while Safety rated well from the survey, it is a major driver of overall satisfaction and requires continued focus
- However, another driver is how the City handles major events – overall, doing this well so keep it up!
- Key take-away: Continue to address storm drainage, cleanliness of business/commercial streets, condition of roads and traffic flow

■ Businesses

- City government caring about business' concerns, public transportation (ability to get customers to business), code enforcement (fairness and consistency) and how the City handles major events, in large measure, drive satisfaction among businesses
- Similar to Residents, traffic flow and storm drainage also drive outcomes

Final Summary

Final Summary

What two or three changes would make Miami Beach a better place to live, work, play, or visit? [RESIDENTS]

<u>2005 Rank</u>	<u>Category</u>	<u>% TOTAL</u>	<u>% NB</u>	<u>% MB</u>	<u>% CC</u>	<u>% SB</u>	<u>% SP</u>
3	1) Safety (crime, police)	20	24	24	21	16	19
2	2) Traffic (congestion)	16	15	24	18	8	9
4	3) Cleanliness of the City	11	7	9	7	14	17
5	4) Available parking	6	4	4	7	10	9
1	5) Development/construction	6	9	6	8	6	4
	More cultural activities	5	3	2	4	6	3
	More recreational opportunities	4	5	3	1	2	3
	Transportation services (buses, etc.)	4	5	2	6	6	4
	Address Noise	2	0	2	1	3	5
	More/better Nightclubs	1	1	0	1	2	1
	More/better Restaurants	1	0	1	1	2	1
	More better communications	1	0	0	1	1	1
	Other*	22	25	21	23	23	23

***Most commonly mentioned included: Address homelessness, lower taxes, bury utility lines**

Final Summary

What do you feel are the two most important challenges facing your business in Miami Beach over the next several years? [BUSINESSES]

2005 Rank	Category	%		%		%	
		<u>NB 1</u>	<u>NB 2</u>	<u>MB 1</u>	<u>MB 2</u>	<u>SB 1</u>	<u>SB 2</u>
1	1) High property taxes	25	29	31	22	26	17
NA	2) High rent	18	9	6	14	23	18
NA	3) High insurance	14	15	19	15	10	12
6	4) Difficulty recruiting skilled labor	8	6	9	11	12	15
	Lack of affordable housing	5	15	12	13	8	13
	Restrictive government codes	9	7	6	8	9	6
	Competitive business pressures	11	4	4	6	4	3
	Not enough space	6	5	8	3	5	7
	Outdated facilities	0	2	0	5	1	2
	Obtaining incentives	0	0	0	0	0	2
	Other*	3	7	5	5	2	5

**Most commonly mentioned included:
Poor traffic and lack of available parking*

Final Summary

- Resident results overall remain quite favorable across a number of survey items, and some services have improved further, including cleanliness of canals/waterways, customer service and availability of cultural activities
- Quality of life in the City is rated highly, the City is seen as an ‘excellent’ or ‘good’ place to live, work, play or visit (and majority feel it’s getting better) and over ¾’s of residents would recommend it to others as a place to live
- In addition, business results improving across many survey items, with over 40% of comparable questions increasing by at least 5 points from 2005
 - Now approaching the high levels of resident satisfaction and favorability (as compared to norms especially)
- In comparison to other cities/jurisdictions, Miami Beach is often similar to or above norms
 - Only a few instances where Miami Beach falls below other cities/jurisdictions (and it’s similar to 2005 findings)

Key Positive Findings (underlined are key drivers)

- Improvement in business results (major increase from 2005)
 - Overall improvement is seen in rating the City of Miami Beach as a place to run a business, but even more dramatically in the job the City of Miami Beach is doing in meeting their needs
 - Significant improvements in business ratings can be seen in several areas including cleanliness of streets and waterways, collection of garbage and trash, landscape maintenance in rights-of-way and public areas, amount done for historic preservation, ratings of recreational programs and facilities, recently completed capital projects, overall experience when contacting the City
- Quality of life in the City is rated highly, the City is seen as an ‘excellent’ or ‘good’ place to live, work, play or visit (and majority feel it’s getting better) and most would recommend it to others as a place to live or do business
- Safety during the day/evening is positive and services from Fire, EMS, Ocean Rescue/Beach Patrol, Emergency/Hurricane preparedness and Police rated well
- Recent capital improvement projects (Beachwalk, Tot lots and Youth Centers, Golf Club, etc.) favorable and similar to 2005

Key Positive Findings (underlined are key drivers) – cont'd

- Maintenance/appearance of public buildings, parks, playgrounds, landscaping in rights of way, and street lighting positive
- Recreation programs/facilities and quality of beaches still quite favorable
- Tourism's contribution to quality of life and Residents contribution to business success viewed favorably
- When contacting the City, courteousness/professionalism of City employees most positive of the customer service questions
- Cleanliness of streets in neighborhoods and Garbage/trash collection still rated well
- 2/3 feel the City is doing enough with historic preservation and being dog-friendly
- Noise levels (across the City, generally not a problem)
- Availability of events and job the City is doing handling events show good results

Key Areas for Improvement (underlined are key drivers)

- Pace of new construction/development (results less positive this year)
 - In and of itself, pace of construction did not emerge as a key driver of satisfaction – the bigger issue is the impact construction has on the City (traffic, cleanliness, etc.)
- Getting Around the City
 - Traffic flow (biggest decline in the survey results for residents)
 - Condition of roads
 - Available parking in neighborhoods and especially in other parts of the City
 - Availability of pedestrian trails & bike paths/lanes
 - Ability of public transit to get employees/customers to businesses
- Addressing homelessness
- Storm drainage, cleanliness of canals/waterways and condition of sidewalks
- Availability (too few) museums/theaters, family friendly activities, and stores
- When contacting the City, ease of finding someone, having trained staff, and overall satisfaction with experience (varies based on reason for contact)
- Dealing with the Building Department

Additional Areas of Focus

- As in the last survey, one of the most important issues emerging from the results is the variation in views across the different regions in Miami Beach
 - Mid-Beach overall tends to be the most positive – South Beach and South Pointe results improving on the aggregate as well
 - There appears to be a widening gap between North Beach and other regions (across a wide variety of issues) - North Beach often least favorable and lower than 2005 scores

- While results for safety and police services are favorable, residents and businesses do feel it is important to increase visibility of police, in neighborhoods especially

- About 1/3 of residents feel that the City should spend its tax dollars towards housing, mostly for those making <\$50k a year and for elderly/seniors

Normative Comparison Summary (underlined are key drivers)

- Miami Beach compares very well against normative benchmarks
- Instances where Miami Beach is above norm on most or all comparisons:
 - Quality of life (compared to similar cities and other cities in Florida)
 - Miami Beach as a place to live
 - City government meeting needs and open/interested in residents' concerns and issues
 - Street lighting
 - Recreation programs and facilities
 - Appearance of playgrounds
 - Quality of beaches
 - Maintenance of parks
 - Code enforcement
 - Safety (Police, Fire, EMS, Emergency preparedness, safe during day/night)
 - Condition of roads, local schools, courteous employees
- Instances where Miami Beach is below norm
 - Storm drainage (except for similar cities where results are on par)
 - Pedestrian trails and bicycle paths/lanes
 - Value of City services for taxes paid
 - Garbage/trash collection (except for similar cities where results are on par)
 - Condition of sidewalks
 - Training of employees and overall experience dealing with the City (except for similar cities where results are on par)

Key Findings by Region – Residents

- South Pointe residents (generally similar to 2005 scores)
 - **More Positive than Others:**
 - Quality of life and Miami Beach as a place to live (getting better)
 - Street lighting
 - Traffic flow
 - City government is interested in meeting the needs of your family
 - **Less Positive than Others:**
 - Cleanliness of neighborhood and business/commercial streets
 - Storm drainage
 - Amount of noise
 - Availability of parking in neighborhood and across the City
 - City Police
 - Availability of stores

Key Findings by Region – Residents (cont'd)

- South Beach residents (good improvement overall from 2005)
 - **More Positive than Others:**
 - Miami Beach as a place to live, whether it's better or worse and recommending to others
 - Quality of beaches
 - Pace of new construction
 - Traffic flow
 - Pedestrian trails and bicycle paths/lanes
 - Emergency/Hurricane Preparedness
 - Feelings of safety in business/commercial areas at night
 - City services for tax dollars paid
 - City government is open/interested in concerns or issues, and interested in meeting the needs of your family
 - **Less Positive than Others:**
 - Cleanliness of neighborhood and business/commercial streets
 - Availability of parking in neighborhood
 - Experience with the Building Department

Key Findings by Region – Residents (cont'd)

- Condo Corridor residents (slight improvement overall from 2005)
 - **More Positive than Others:**
 - Cleanliness of neighborhood streets
 - Storm drainage
 - Condition of sidewalks and roads
 - Street lighting
 - Availability of museums/theaters
 - Satisfaction with local schools
 - City government is open/interested in concerns or issues, and interested in meeting the needs of your family
 - **Less Positive than Others:**
 - Quality of beaches
 - Pace of new construction
 - Availability of parking in neighborhood
 - Availability of stores

Key Findings by Region – Residents (cont'd)

- Mid-Beach residents (similar to 2005 scores)
 - **More Positive than Others:**
 - Quality of life and Miami Beach as a place to live
 - Cleanliness of neighborhood and business/commercial streets
 - Amount done to be dog-friendly
 - Amount of noise
 - Availability of parking in neighborhood
 - City Police and feelings of safety in neighborhood at night
 - Availability of museums/theaters, family friendly activities, and cultural activities
 - **Less Positive than Others:**
 - Cleanliness of canals/waterways
 - Building code enforcement and zoning/ordinance code enforcement
 - Pace of new construction
 - Emergency/Hurricane Preparedness
 - Job the City is doing handling major events
 - City government is open/interested in concerns or issues

Key Findings by Region – Residents (cont'd)

- North Beach residents (least favorable overall and declining the most of all regions from 2005)
 - **More Positive than Others:**
 - All customer service questions (when contacting the City) and experience with the Building Department
 - **Less Positive than Others:**
 - Quality of life, Miami Beach as a place to live, whether it's better or worse and recommending to others
 - Cleanliness of streets in neighborhood
 - Traffic flow
 - Pedestrian trails
 - Feelings of safety during the day/night in neighborhood and in business/commercial areas
 - Availability of cultural activities
 - City services for taxes paid

Key Findings by Region – Businesses

- South Beach businesses (good improvement from 2005)
 - **More Positive than Others:**
 - Pace of new construction
 - Traffic flow
 - **Less Positive than Others:**
 - Addressing homelessness
 - Availability of parking around business
 - Inspections helped improve fire safety

Key Findings by Region – Businesses (cont'd)

- Mid-Beach businesses (most favorable overall and improving the most from 2005)
 - **More Positive than Others:**
 - Cleanliness of streets in business/commercial areas, canals/waterways and garbage/trash collection
 - Storm drainage
 - Maintenance of parks and landscape rights of way
 - Recreation programs and facilities
 - Condition of roads
 - Availability of parking around business
 - Availability of restaurants, cultural activities and family friendly activities
 - City services for taxes paid
 - **Less Positive than Others:**
 - Zoning/ordinance code enforcement
 - Pace of new construction
 - Traffic flow
 - Experience with the Building Department

Key Findings by Region – Businesses (cont'd)

- North Beach businesses (least favorable overall but slightly improved from 2005)
 - **More Positive than Others:**
 - Building code enforcement
 - Inspections helped improve fire safety
 - All customer service questions (when contacting the City) and experience with the Building Department
 - **Less Positive than Others:**
 - Cleanliness of streets in business/commercial areas
 - Pace of new construction
 - Traffic flow
 - Feelings of safety during the day/night in neighborhood and in business/commercial areas
 - Street lighting
 - Availability of restaurants, cultural activities and family friendly activities
 - City services for taxes paid

Next Steps

Next Steps

- Post-retreat discussions
 - Review and acknowledge survey results
 - Consensus on positive areas and opportunities for improvement
 - Link to strategic themes and recent/planned initiatives
- Agree to address several key issues that impact strategic plan and tie into upcoming initiatives
 - Focus on the key areas where you could make important “headway” over the next two years
 - Keep in mind that not all groups share the same views and that some issues are concentrated by region

Next Steps (cont'd)

- Communicate to all groups (residents, businesses and City employees)
 - Survey acts as a communication tool – continue the dialogue
 - Send out communication (through various media/methods and in English/Spanish) on survey results
 - Thank and provide feedback on methodology and overview of results
 - Be clear that not all areas can be addressed immediately but that highest priorities will get attention
 - Involve them in developing action plans (perhaps some ad-hoc focus groups centered around specific issues from the survey, e.g., transportation)
 - On-going communications with groups (utilizing various media) to update them on progress and any actions taken - link actions to survey results

*Appendix: Demographic
Summary*

Demographic Summary – Residents

- By Gender
 - Little difference overall
 - Men do tend to be more favorable on quality of life in the City and safety during the evening/night
 - Women more positive about customer service contact with City employees and satisfaction with local schools
- By Ethnicity
 - Black/African American (non-Hispanic) residents are the most favorable overall about a number of City services, value of City services for tax dollars and satisfaction with schools
 - In terms of favorability, Hispanic/Latinos are also more favorable than other groups on storm drainage, garbage/trash collection, maintenance of parks, and code enforcement
 - White/Caucasian residents tend to be more moderately positive, with wide variation in results by issue

Demographic Summary – Residents (cont'd)

- By Homeowner Status – Own vs. Rent
 - Owners quite a bit less positive than renters on cleanliness of streets & canals/waterways, storm drainage, building code enforcement, development, traffic/road condition, City's job handling events, satisfaction with local schools, and customer service
 - An exception is neighborhood parking and availability of family friendly activities where owners are much more positive than renters
- By Residence Type
 - Residents in apartments/condominiums are the most positive on quality of life questions and code enforcement but least so on parking in their neighborhood
 - Those living in duplexes or townhouses are generally the least favorable group (a switch from 2005 where they were the most positive), notably on cleanliness of streets, storm drainage and garbage trash collection

Demographic Summary – Residents (cont'd)

- **By Tenure in City**
 - Results follow typical pattern in that newer residents (in the City less than 2 years) are most positive about the City overall, including services, transportation (traffic/road condition) and development
 - Residents who have lived in Miami Beach over 10 years are significantly less favorable about parking and safety during the evening/night
- **By Age**
 - Older residents (especially those 65+) tend to be the most positive residents (this is different from 2005 where younger residents, who are still quite favorable, were the highest)
 - Younger residents are actually more concerned about traffic flow, tourism contributing to quality of life, and safety during the evening/night
- **By Income**
 - Those in the lower income bracket (under \$25k) are most favorable about quality of life, government meeting their needs, customer service, tourism impact on residents, and maintenance of parks; however, they are more critical about neighborhood parking
 - Satisfaction with schools varies by income – those who make less than \$75k are significantly more satisfied than higher income residents
 - Also, no significant difference in rating of 'City services for tax dollars paid' by income level – all groups lukewarm (40-50% favorable)

Demographic Summary – Residents (cont'd)

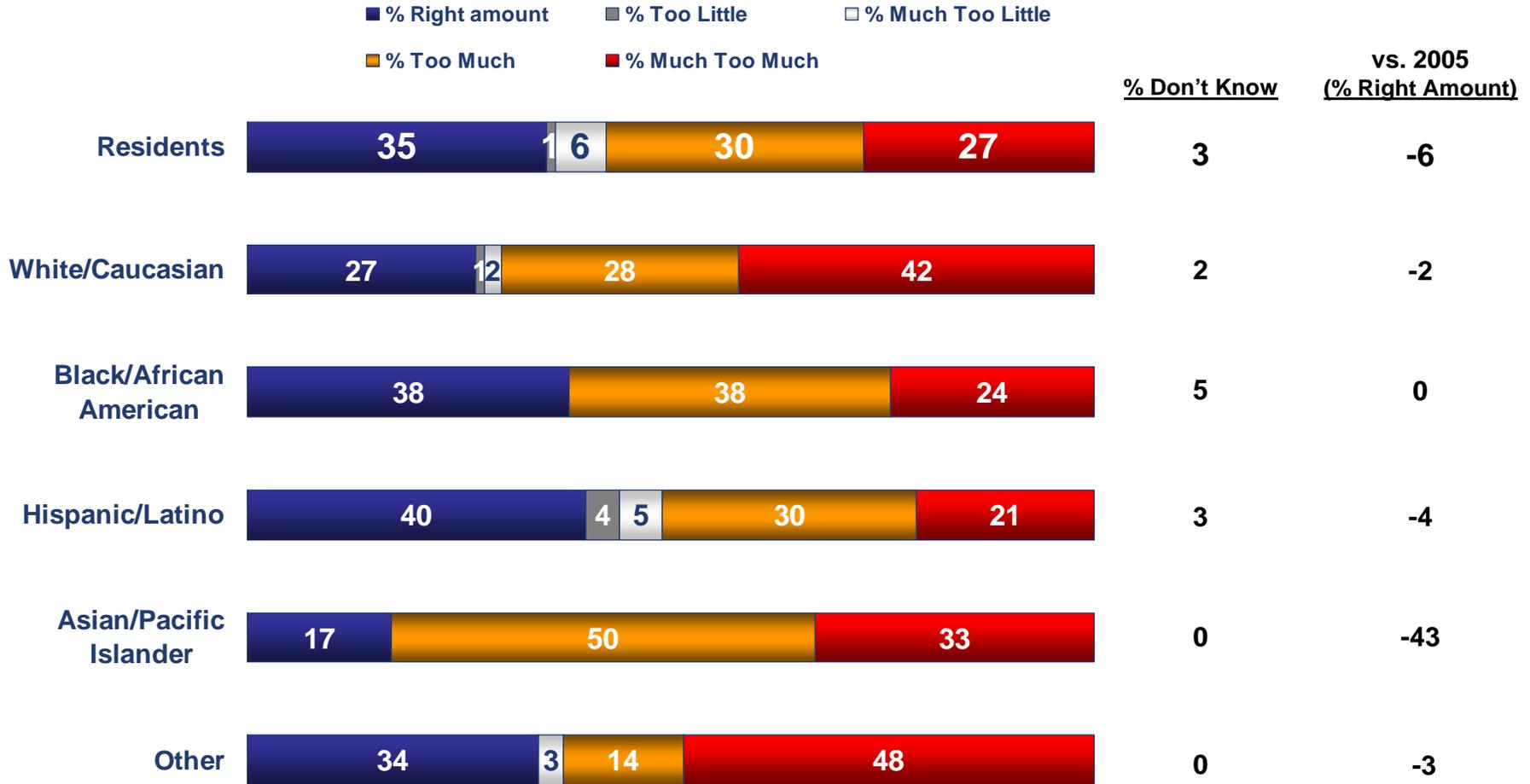
- **By Primary Language**
 - Spanish and Portuguese speaking residents are the most favorable about quality of life and City government being open and interested in residents' needs
 - Portuguese speaking residents however are significantly less favorable about City services for taxes paid and availability of cultural activities
- **By Marital Status**
 - Very few major differences by marital status, although residents that are married or divorced/separated with no children tend to be slightly more favorable
 - Single living with roommate/partner are consistently less positive
- **By Months of Year in City**
 - Residents living in the City less than six months a year are quite a bit more positive about City services and quality of life than those living in the City more than six months a year
 - Those living in the City 1-3 months a year are more favorable about cleanliness but least favorable about the value of city services they get for taxes and availability of stores

Demographic Summary – Businesses

- **By Position**
 - Nearly 2/3 of those interviewed were owners of the establishment, 1/3 were mgmt
 - In comparing owners to management, owners more critical across most survey questions especially on fairness of inspections and customer service questions – they are more favorable about availability of museums/theaters and family friendly activities
- **By Tenure in Miami Beach**
 - Not surprisingly, the newer the business, the more favorable, with the 5 to 10 year group the least positive overall
- **By Number of Full-time/Part-time employees**
 - Generally, the larger the organization, the less favorable, in particular regarding services and transportation – although development least positive for smaller companies (less than 10 employees)
- **By Revenue**
 - Interestingly, businesses that make \$500k-\$1m & More than \$25m are nearly equal in their overall favorability (65% favorable average), although they are least so on City services for taxes paid
 - Businesses that make \$6-10m are least positive
- **By Number of Locations in Miami Beach**
 - Little difference - businesses that have 2 locations least positive on City services for taxes paid and parking for customers
- **By Locations outside of Miami Beach**
 - Those businesses that also have locations in Central/Northern Florida less positive generally

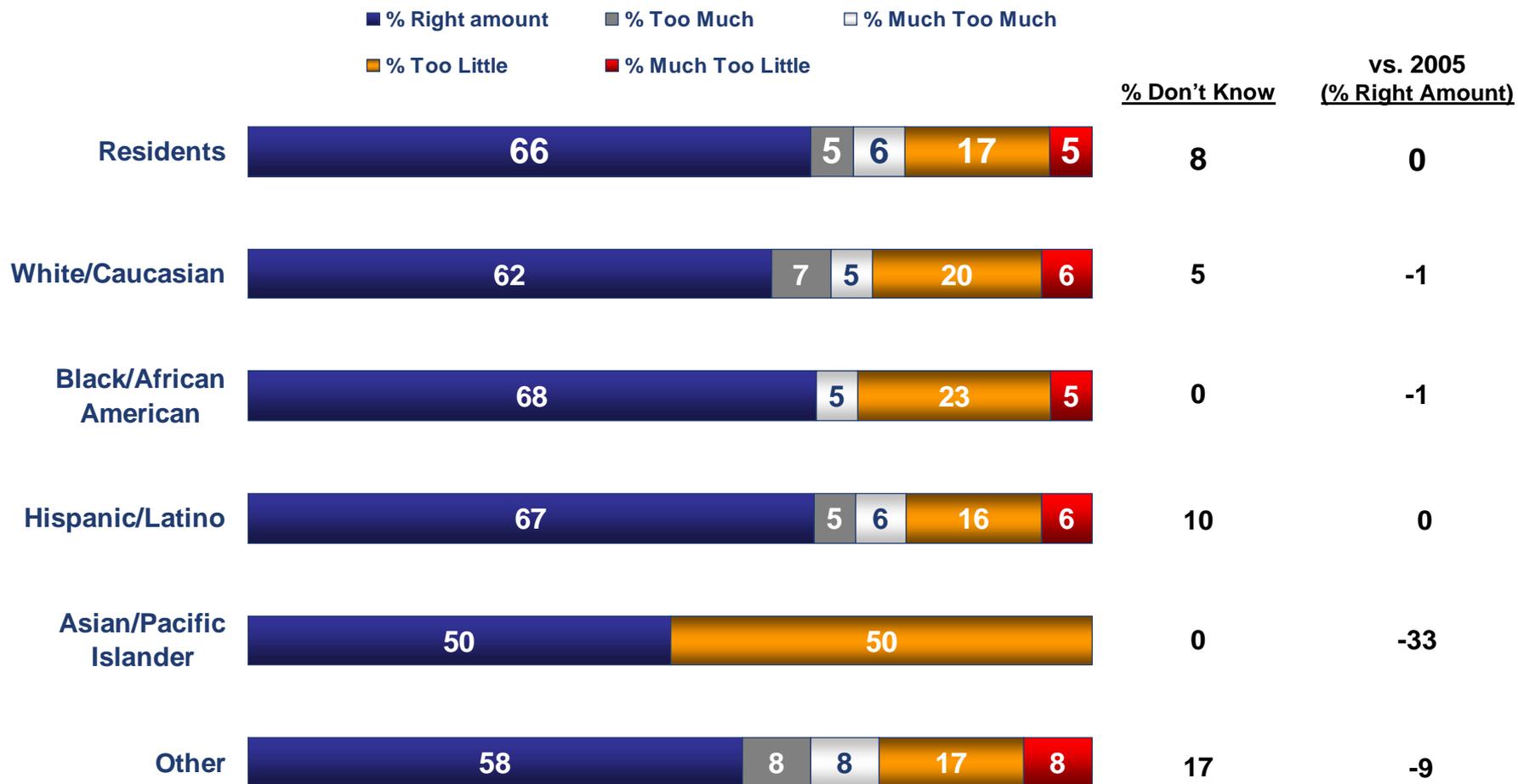
Construction/Development – Residents by Ethnicity

Pace of new construction across the City of Miami Beach



Historic Preservation – Residents by Ethnicity

Amount done for historic preservation



Preferred Cultural Activity – Residents by Ethnicity

What type of cultural activity would you most like to see more of in the City?

<u>Category</u>	<u>% TOTAL</u>	<u>% White</u>	<u>% Black</u>	<u>% Hispanic</u>	<u>% Asian</u>	<u>% Other</u>
1) Live music/concerts	28	23	23	24	33	21
2) Plays	16	19	5	18	17	10
3) Art shows	10	10	14	8	7	6
4) Music or Movies in our parks	10	6	14	8	0	10
5) Symphonic Music	10	12	9	12	17	10
Music or Movies in our beaches	8	8	9	8	0	14
Comedy shows	7	8	9	4	0	10
Dance	6	3	5	7	0	0
Other*	5	6	5	3	33	10
Don't Know	7	6	9	8	0	10

*Most commonly mentioned included: opera, classical music, ballet, Cirque de Soleil

Preferred Cultural Activity – Residents by Age

What type of cultural activity would you most like to see more of in the City?

<u>Category</u>	% <u>TOTAL</u>	% <u><=24yo</u>	% <u>25-34</u>	% <u>35-44</u>	% <u>45-54</u>	% <u>55-64</u>	% <u>>=65</u>
1) Live music/concerts	28	38	31	26	27	19	21
2) Plays	16	15	13	16	16	19	21
3) Art shows	10	15	9	9	9	14	6
4) Music or Movies in our parks	10	8	11	9	9	6	5
5) Symphonic Music	10	0	7	9	7	13	17
Music or Movies in our beaches	8	0	9	10	14	6	5
Comedy shows	7	8	9	10	7	3	4
Dance	6	8	3	6	1	4	6
Other*	5	8	5	4	4	7	5
Don't Know	7	0	3	3	5	7	11

*Most commonly mentioned included: opera, classical music, ballet, Cirque de Soleil