City of Miami Beach 2016 Survey

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Final Report

ETC INSTITUTE

Contents

2016 City of Miami Beach Resident and Business Surveys Executive Summary

OVERVIEW AND METHODOLOGY

Overview

ETC Institute administered resident and business surveys for the City of Miami Beach during the summer of 2016. The purpose of the surveys was to objectively assess satisfaction among residents and business leaders with the delivery of city services and to gather input about priorities for the City. This is the first time ETC Institute administered the surveys for the City of Miami Beach; previous surveys were conducted in 2005, 2007, 2009, 2012 and 2014.

Methodology

Resident Survey. ETC Institute selected a random sample of households for the survey. The sample was address-based, and the households were selected at random from all known residential addresses in the City of Miami Beach. This method ensured that each household in the City had an equal probability of being selected for the survey. Survey packets were then mailed to each of the households selected for the random sample. The survey packets contained a cover letter, a copy of the survey, and a postage-paid, return envelope. A few days after the surveys were mailed, ETC Institute sent emails and placed phone calls to households in the random sample to encourage participation.   The emails contained a link to the on-line version of the survey to make it easy for residents to complete the survey. To prevent the responses from people who were not part of the random sample from being blended with those who were selected for the random sample, everyone who completed the survey on-line was required to enter their home address prior to submitting the survey. ETC Institute then matched the addresses that were entered on-line with the addresses that were originally selected for the random sample. If the address from a survey completed on-line did not match one of the addresses selected for the random sample, the on-line survey was not counted as part of the random sample. A total of 1,908 residents from the random sample completed the survey. The results for the random sample of 1,908 households have a 95% level of confidence with a precision rate of at least +/- 2.2%.

Business Survey. ETC Institute also selected a random sample of business leaders for the survey. The sample was address-based, and the businesses were selected at random from all known businesses in the City of Miami Beach. This method ensured that each business in the City had an equal probability of being selected for the survey. Survey packets were then mailed to each of the businesses selected for the random sample. The survey packets contained a cover letter, a copy of the survey, and a postage-paid, return envelope. The survey was addressed to the owner or manager of the business to ensure the results would reflect the opinions of business leaders in the City. A few days after the surveys were mailed, ETC Institute sent emails and placed phone calls to the businesses that were selected for the survey to encourage participation. The emails contained a link to the on-line version of the survey to make it easy for business leaders to complete the survey. To prevent the responses from businesses that were not part of the random sample and/or multiple responses from the same business, everyone who completed the survey on-line was required to enter their business address prior to submitting the survey. ETC Institute then matched the addresses that were entered on-line with the addresses that were originally selected for the random sample. If the address from a survey completed on-line did not match one of the addresses selected for the random sample, the on-line survey was not counted as part of the random sample. If duplicate addresses were entered, only the first response was counted. A total of 1,000 businesses completed the survey. The results for the random sample of 1,000 businesses have a 95% level of confidence with a precision rate of at least +/- 3.0%.

Location of Respondents

To better understand how well services are being delivered in different parts of the City, the home and business addresses of the respondents to the survey were geocoded.

- **Business Survey Map**. The dots on the map to the right show the distribution of business survey respondents based on the location of their business. Appendix B-1 of the report contains maps that show how respondents in different areas of the survey rated a wide range of City services.

- **Resident Survey Map**. The dots on the map on the following page show the distribution of survey respondents based on the location of their home. Appendix A-1 of the report contains maps that show how respondents in different areas of the survey rated a wide range of City services.

Location of Survey Respondents

City of Miami Beach 2016 Business Survey

Location of Survey Respondents

City of Miami Beach 2016 Resident Survey
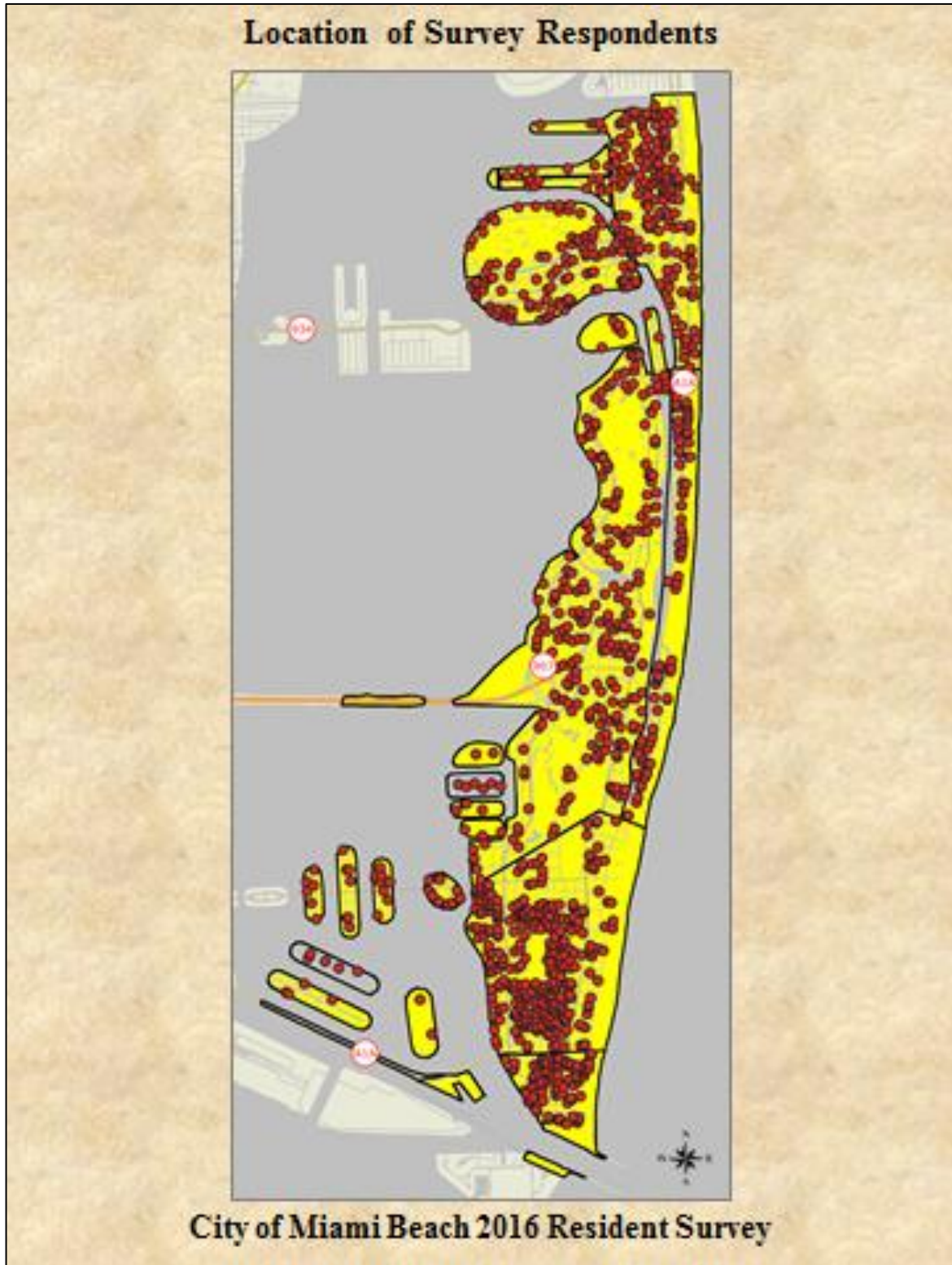
"Don't Know" Responses

The percentage of "don't know" and "no opinion" responses has been excluded from graphs to facilitate valid comparisons to previous years and to other communities in ETC Institute's national survey database.

This report contains:

➢ A summary of the methodology for administering the survey and major findings

➢ Resident survey findings, including charts and graphs, overall trends, Importance-Satisfaction priorities analysis, benchmarking comparisons to other communities, and the survey instrument

➢ Business survey findings, including charts and graphs, trends, Importance-Satisfaction priorities analysis, and the survey instrument

➢ Supplemental data from the resident and business surveys, including GIS maps and crosstabulations, are published separately as Appendix A and Appendix B

MAJOR FINDINGS

Overall Ratings for the City. Ninety-two percent (92%) of residents and 95% of businesses rated the quality of fire services in Miami Beach as "excellent" or "good." Other City services with combined ratings of "excellent" and "good" include: emergency medical services (84% resident, 91% business), ocean rescue/lifeguard/beach patrol (85% resident, 90% business), appearance/maintenance of the City's public buildings (79% resident, 87% business), and emergency/hurricane preparedness efforts (77% resident, 88% business). Forty-seven percent (47%) of residents and 32% of businesses were dissatisfied with the job the City is doing to address homelessness.

Services That Are Most Important for the City to Provide. When residents and businesses were asked to name the City services that were most important to provide, the sum of their top five choices included:

- Most Important Services to Residents
  - Cleanliness of neighborhood streets
  - Police services
  - Efforts to manage stormwater drainage/flooding
  - Overall quality of the beaches
  - The job the City is doing to address homelessness.

- Most Important Services to Businesses
    - Police services
    - Cleanliness of streets near businesses
    - Emergency medical services
    - The job the City is doing to address homelessness
    - Condition of City roads in Miami Beach.

Feeling of Safety in Miami Beach

- **Residents**. Nearly all (98%) of the residents surveyed indicated they feel "very safe," "safe" or "somewhat safe" in their neighborhood during the day; 91% feel "very safe," "safe" or "somewhat safe" in their neighborhood during the evening/night, and 90% feel "very safe," "safe" or "somewhat safe" in entertainment areas.

Q5. Feeling of Safety in Miami Beach
by percentage of respondents (excluding "don't know")

	Very Safe (5)	Safe (4)	Somewhat Safe (3)	Unsafe (2,1)
In neighborhoods during the day	56%	34%	8%	
In neighborhoods during the evening/night	30%	38%	23%	9%
In City parks that currently have Park Rangers during park hours (Flamingo, N. Shore Open Space, S. Shore Park)	21%	39%	27%	12%
In entertainment areas	16%	43%	31%	10%
In business/commercial areas during evening/night	15%	39%	34%	12%
During special events	15%	35%	30%	20%

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

- **Businesses.** Ninety-four percent (94%) of business respondents indicated they feel "very safe," "safe" or "somewhat safe" in and around their place of business during the daytime, and 80% feel "very safe," "safe" or "somewhat safe" in and around their place of business during evening/night.

Q10. Feeling of Safety in Miami Beach

by percentage of respondents (excluding "don't know")

	Very Safe (5)	Safe (4)	Somewhat Safe (3)	Unsafe (2,1)
In/around place of business during daytime	54%	28%	12%	6%
In/around place of business during evening/night	31%	24%	25%	20%

Source: ETC Institute (2016 - Miami Beach Business Survey)
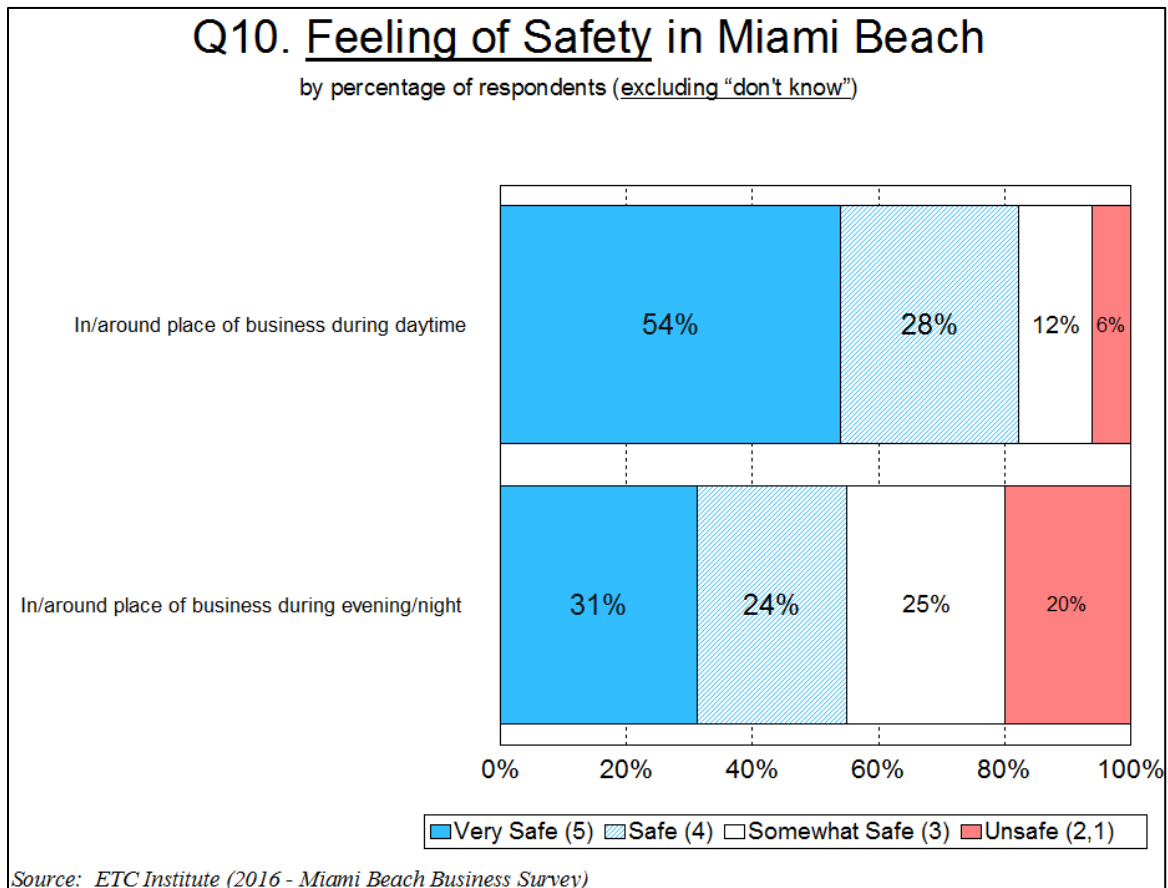
Perceptions of the City

- **Residents** Seventy percent (70%) of the residents surveyed were "very satisfied" or "satisfied" with the City of Miami Beach as a place to live; 67% were "very satisfied" or "satisfied" with the quality of life within the City, and 66% were "very satisfied" or "satisfied" with the overall image of the City. Residents were least satisfied with City regulation of commercial development (28% "very satisfied" or "satisfied").

- **Businesses** Sixty percent (60%) of business respondents surveyed were "very satisfied" or "satisfied" with the overall quality of services provided; 59% were "very satisfied" or "satisfied" with the City meeting expectations with services provided, and 45% were "very satisfied" or "satisfied" with the City's efforts to be a "green" or sustainable city. Business respondents were least satisfied with stormwater drainage (28% "very satisfied" or "satisfied").

Code Enforcement

- **Residents**. More than half (53%) of the residents surveyed feel the level of code enforcement and ordinance in neighborhoods is "about right"; 17% feel the level of code enforcement is "too much/too restrictive" and 30% indicated the level is "too little/not restrictive enough."

Q10. Perceived Level of <u>Code Enforcement and Ordinance</u> in Neighborhoods
by percentage of respondents (excluding "don't know")

About right 53%
Too much/too restrictive 17%
30% Too little/not restrictive enough

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)
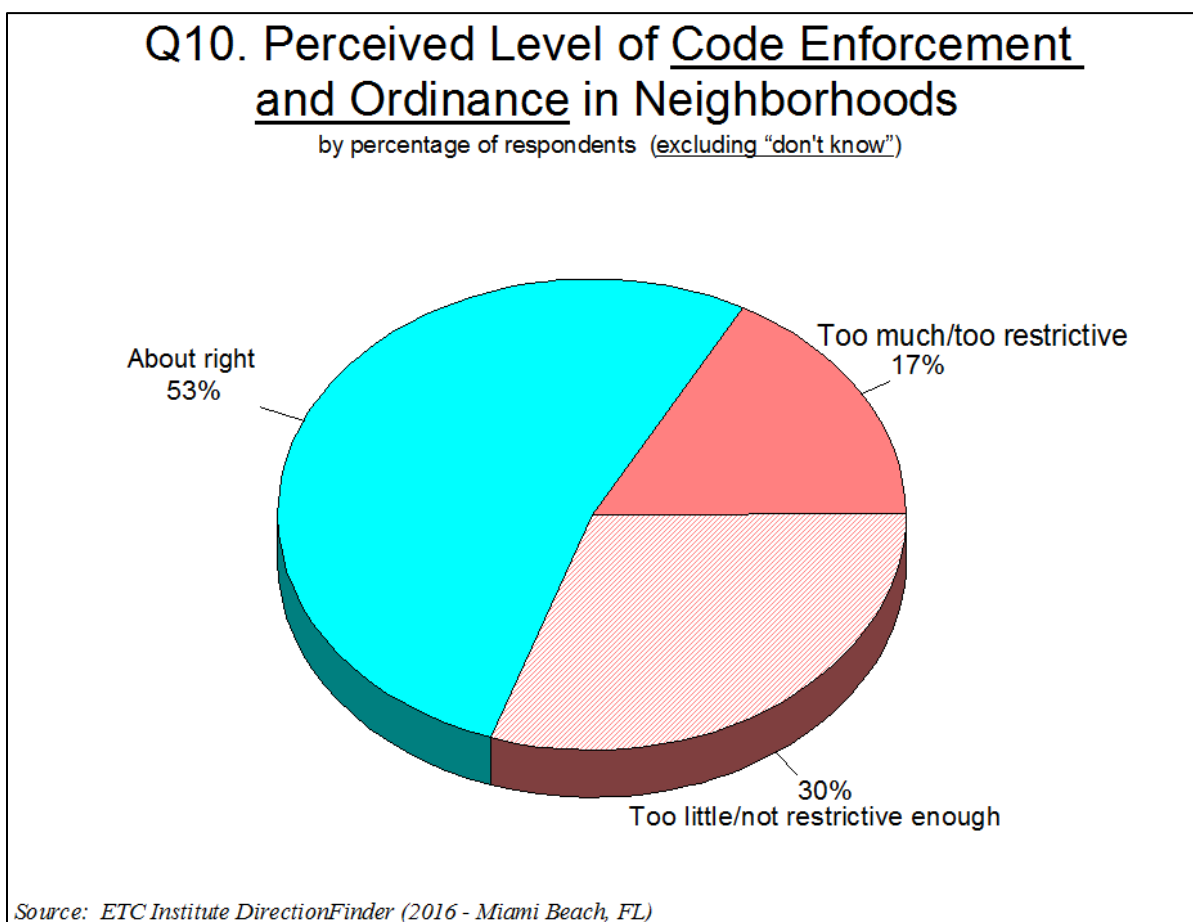
- **Businesses.** Fifty-nine percent (59%) of the business respondents feel the level of code enforcement and ordinance near their business is "about right"; 27% feel the level of code enforcement is "too much/too restrictive" and 14% indicated the level is "too little/not restrictive enough."

Q14. Do you think the level of code enforcement and ordinance near your business is:
by percentage of businesses (excluding "don't know")

Too much/too restrictive
27%

About right
59%

14%
Too little/not restrictive enough
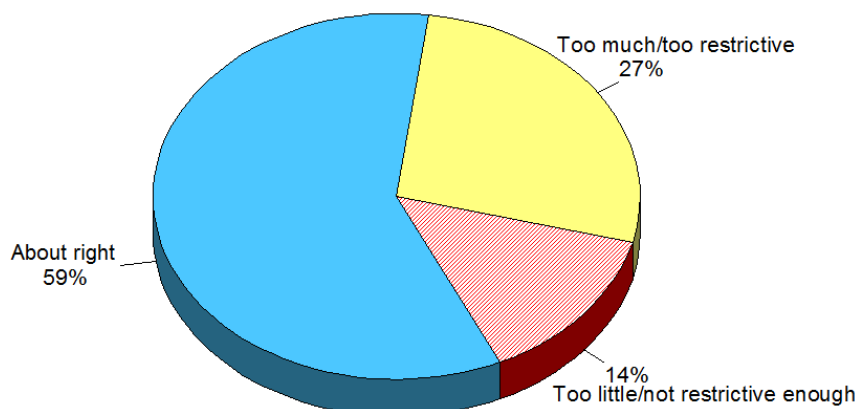
Source: ETC Institute (2016 - Miami Beach Business Survey)

Transportation and Parking Issues for <u>Residents</u>

- More than two-thirds (69%) of the residents surveyed indicated their primary mode of transportation in Miami Beach is an automobile; 14% primarily walk, 7% bike, 7% use public transportation, and 3% use a motorcycle or scooter as their primary mode of transportation.

- Sixty-nine percent (69%) of the residents surveyed feel there is "too little" parking available in the City; 30% feel the availability of parking is "about right" and 1% indicated there is "too much" parking available.

- Eight percent (8%) of residents feel the flow of traffic in Miami Beach is "excellent" or "good"; 33% indicated it is "fair," and 59% feel the flow of traffic in the City is "poor."

- When asked what types of transportation residents would consider using as an alternative to taking a car, nearly half (45%) indicated they would consider light rail or a modern street car; 44% would consider a trolley car, 43% would consider bicycles, and 38% would consider local bus circulators. Less than one-fourth (23%) would consider using an express bus to the mainland (*multiple answers could be selected for this question*).

Q17. Types of Transportation Residents Would Consider Using as an Alternative to Taking a Car
by percentage of respondents (excluding "don't know" - multiple selections could be made)

Transportation	Percentage
Light rail/modern street car	45%
Trolley car	44%
Bicycles	43%
Local bus circulators	38%
Express bus to mainland	23%

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)
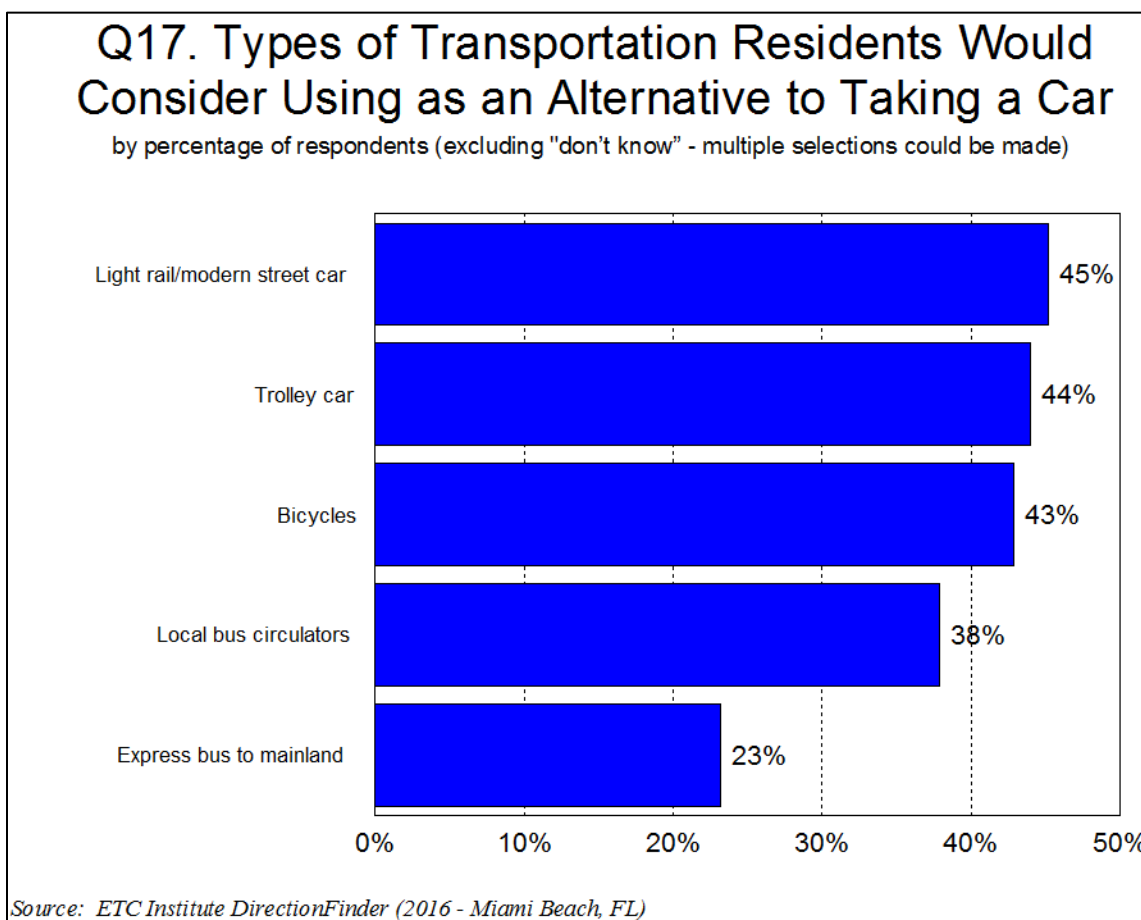
- Nearly half (47%) of the residents surveyed indicated they regularly ride a bicycle. When asked about the level of bicycle safety in the City, 30% feel the City is "very safe" or "safe"; 46% indicated it is "unsafe" and 25% feel the level of bicycle safety in Miami Beach is "very unsafe." In addition, more than two-thirds (69%) believe there are "too few" bicycle paths and lanes throughout the City; 25% feel the number is "about right" and 7% feel there are "too many" bicycle paths and lanes.

- Forty-nine percent (49%) of residents are willing to support the development of bike lanes as a way to significantly reduce the number of on-street parking spaces on main streets in Miami Beach. Other types of development that residents are willing to support include: more shade trees/landscaping (47%), rapid transit or express train (44%), and trolley cars (32%). Residents least support the development of bus lanes (17%) (*multiple answers could be selected for this question*).

Public Transit and Parking Issues for <u>Businesses</u>

- More than half (52%) of the business respondents indicated the overall effectiveness of the public transit system that serves the City is "excellent" or "good"; 28% believe it is "fair," and 20% believe the overall effectiveness is "poor." In addition, 43% of businesses indicated the overall effectiveness of bringing employees to the City is "excellent" or "good"; 31% think it is "fair," and 27% believe the overall effectiveness of bringing employees to the City is "poor."

- Twenty-eight percent (28%) of businesses indicated they have provided free or subsidized parking spots as a way of providing additional transit options for their employees. Other ways include: encouraging public transit use (14%) and coordinate carpool(s) *(multiple answers could be selected for this question).* Fifty-seven percent (57%) of business respondents indicated they currently do not provide additional transit options for their employees.

- One-third (33%) of the businesses surveyed indicated "there are often" or "there are almost always" public and private parking spaces nearby for their customers; 30% feel there are "seldom" parking places nearby, and 38% indicated there are "almost never" parking places nearby for customers.

Q20. Which of the following best describes the availability of public and private parking for your customers?

by percentage of businesses (<u>excluding "don't know"</u>)

There are often parking spaces nearby
19%

There are almost always parking places nearby
14%

There are seldom parking places nearby
30%

38%
There are almost never parking places nearby
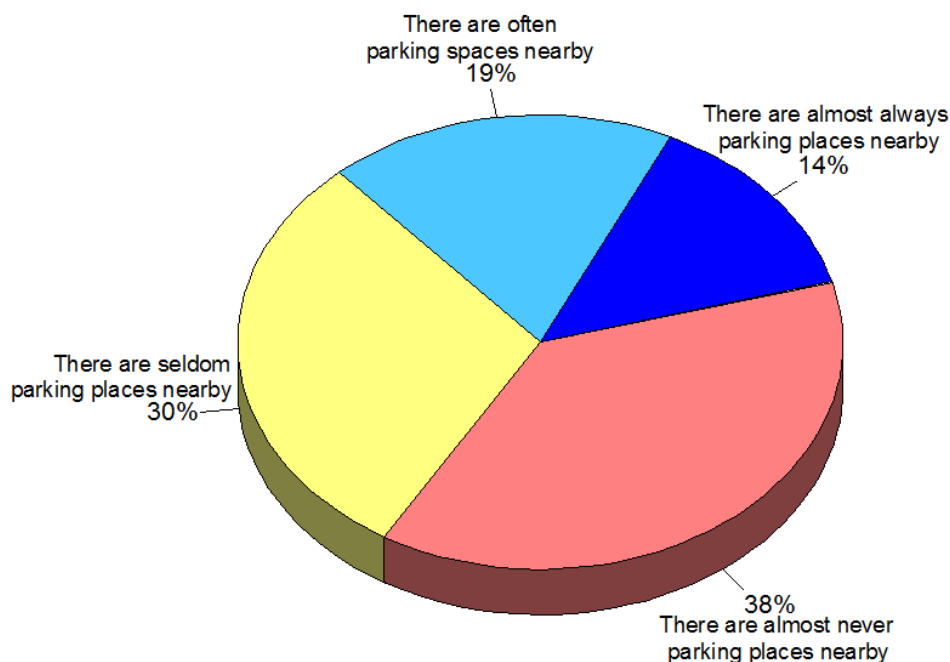
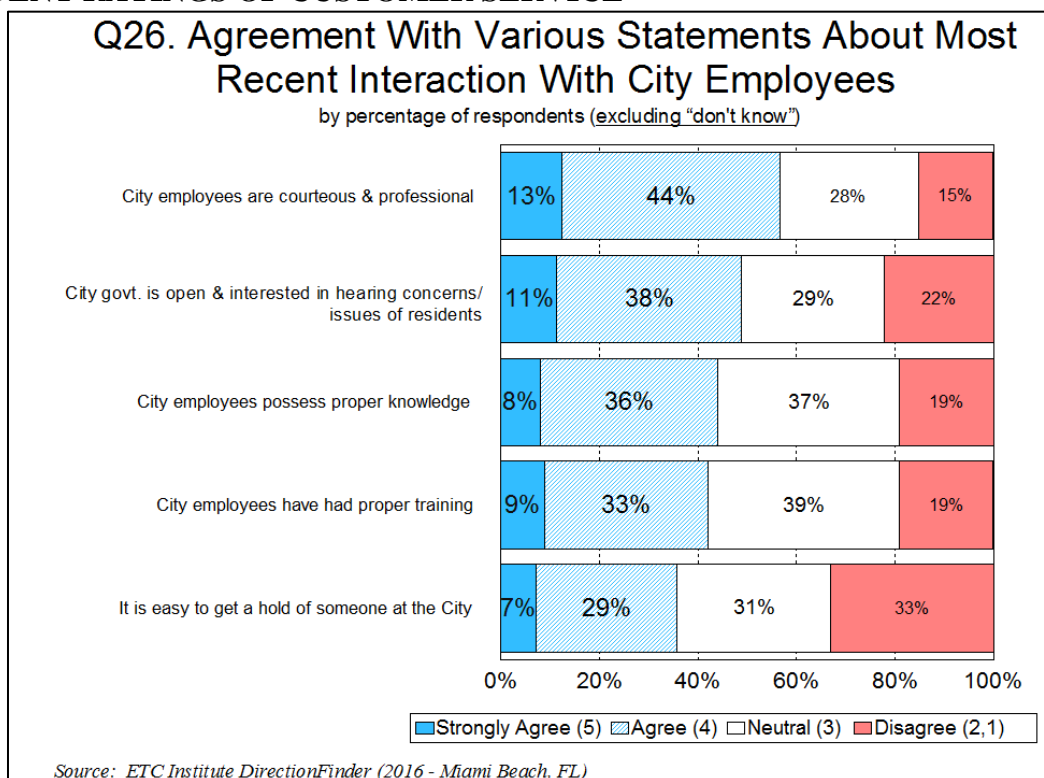*Source: ETC Institute (2016 - Miami Beach Business Survey)*

Communication

- When residents and businesses were asked which sources they utilized to obtain information about City government, issues and events, 46% of residents and 54% of businesses indicated they use the City website (www.miamibeachfl.gov).   Other sources include: MB Magazine (53% resident, 38% business), City e-mail news (24% resident, 22% business), and Facebook (20% resident, 24% business).

- When asked to rate the usefulness of information that the City sends about programs, activities, policies and events, 91% of residents and 93% of businesses indicated the information was "very useful" or somewhat useful." In addition, when asked to rate the usefulness of information provided on the Miami Beach Police Department's social media platforms, 90% of residents and 89% of businesses indicated the information was "very useful" or somewhat useful."

- Seventy-four percent (74%) of residents and 72% of businesses were "very satisfied" or "satisfied" with MB Magazine was a source of City communication. Other sources with which respondents were "very satisfied" or "satisfied" include: e-mail news (61% resident, 73% business), City website (58% resident, 70% business), and social media engagement (49% resident, 64% business). Respondents were least satisfied with the E-Gov app (38% resident, 50% business).

Customer Service

- The residents and business respondents who indicated they had interacted with a City employee during the previous 12 months were asked to provide their level of agreement with various statements regarding their interaction.   Fifty-seven percent (57%) of residents and 65% of businesses "strongly agreed" or "agreed" that City employees were courteous and professional. Other statements regarding customer service with which respondents "strongly agreed" or "agreed" include: City is open and interested in hearing concerns/issues (49% resident, 53% business), City employees possess proper knowledge (44% resident, 61% business), and City employees have had proper training (42% resident, 63% business). Respondents agreed least with the statement "it is easy to get a hold of someone at the City" (36% resident, 47% business).

RESIDENT RATINGS OF CUSTOMER SERVICE

Q26. Agreement With Various Statements About Most Recent Interaction With City Employees
by percentage of respondents (excluding "don't know")

	Strongly Agree (5)	Agree (4)	Neutral (3)	Disagree (2,1)
City employees are courteous & professional	13%	44%	28%	15%
City govt. is open & interested in hearing concerns/ issues of residents	11%	38%	29%	22%
City employees possess proper knowledge	8%	36%	37%	19%
City employees have had proper training	9%	33%	39%	19%
It is easy to get a hold of someone at the City	7%	29%	31%	33%

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

BUSINESS RATINGS OF CUSTOMER SERVICE

Q26. Level of Agreement With Statements Regarding Interaction With City Employees
by percentage of businesses (excluding "don't know")

	Strongly Agree (5)	Agree (4)	Neutral (3)	Disagree (2,1)
City employees are courteous/professional	24%	41%	21%	14%
City employees have had proper training	21%	42%	22%	15%
City employees possess proper knowledge	23%	38%	24%	15%
Overall I was satisfied with experience I had contacting the City	22%	38%	20%	21%
Requests made were processed in a timely manner	23%	33%	23%	21%
I found process to be user-friendly/easy to understand	21%	34%	25%	21%
The City is open & interested in hearing concerns/ issues	22%	31%	25%	22%
Easy to get a hold of someone at the City	19%	28%	25%	28%

Source: ETC Institute (2016 - Miami Beach Business Survey)

OTHER FINDINGS: RESIDENT SURVEY
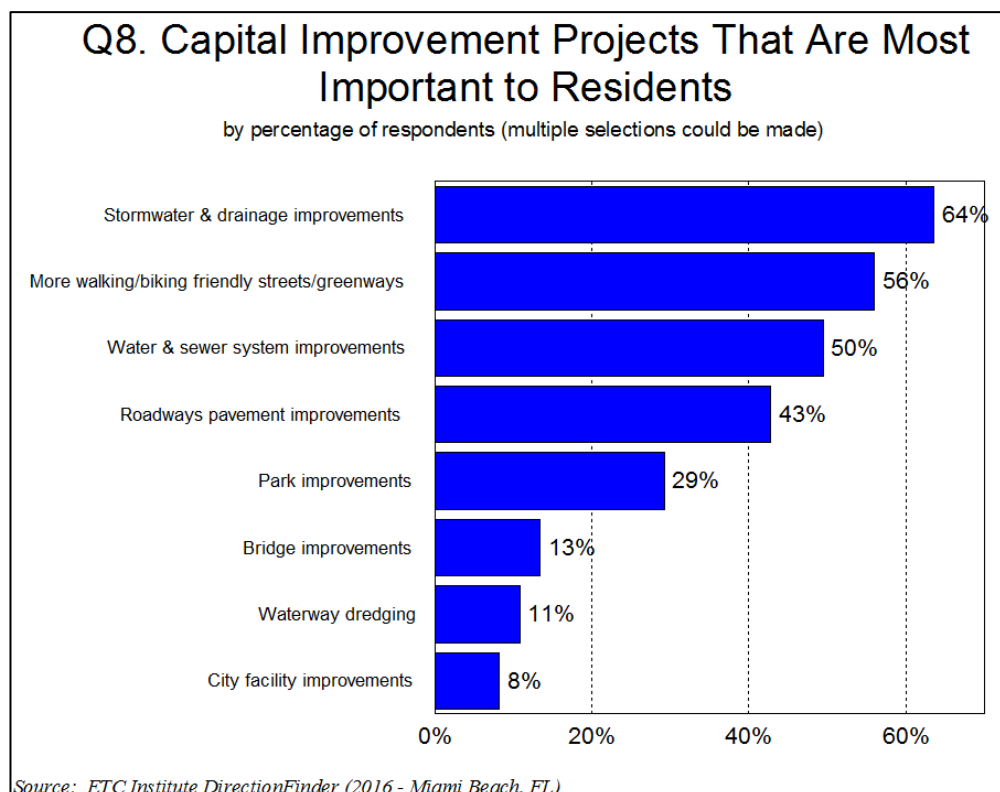
Frequency That Residents Visit Areas or Facilities

- The areas or facilities in Miami Beach that residents visit most often include: Collins Avenue, Alton Road between 6th – 17th, Lincoln Road, 41st Street, and Washington Avenue. The areas or facilities residents visit least often are the Byron Carlye Theater and The Colony Theater.

How Residents Feel About the Number of Amenities in the City

- More than one-third (37%) of residents feel there are too many bars and nightclubs in Miami Beach, while 41% believe there are too few family friendly activities in the City. Sixty-eight percent (68%) of residents feel there is the right amount of restaurants in Miami Beach.

Capital Improvement Projects That Are Most Important to Residents

- Sixty-four percent (64%) of residents indicated that the most important capital improvement project is stormwater and drainage improvements; 56% feel more walking/biking friendly streets and greenways are needed, and 50% believe water and sewer system improvements are important. The least important capital improvement project is City facility improvements (8%) *(multiple answers could be selected for this question).*

Q8. Capital Improvement Projects That Are Most Important to Residents
by percentage of respondents (multiple selections could be made)

Category	Percentage
Stormwater & drainage improvements	64%
More walking/biking friendly streets/greenways	56%
Water & sewer system improvements	50%
Roadways pavement improvements	43%
Park improvements	29%
Bridge improvements	13%
Waterway dredging	11%
City facility improvements	8%

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Support for Spending Tax Dollars to Address Rising Sea Levels

- Eighty-nine percent of residents support spending tax dollars to address rising sea levels in the City, while 11% oppose the spending.

Amount of Noise in Neighborhoods

- Two-thirds (66%) of residents believe the amount is noise in their neighborhood is "acceptable/not a problem;" 20% feel there is "a bit too much" noise, and 14% think there is "way too much" noise in their neighborhood.

Historic Preservation Efforts in Miami Beach

- Sixty-eight percent (68%) of residents think historic preservation efforts in the City of Miami Beach have been "very effective" or "somewhat effective;" 11% think efforts have been "neither effective nor ineffective," and 22% think historic preservation efforts in the City have been "somewhat ineffective" or "very ineffective."

Whether Residents Would Recommend the City to Family and Friends

- Nearly three-fourths (74%) of residents indicated they would "probably recommend" or "definitely recommend" the City of Miami Beach to family and friends as a place to live; 21% would "probably not recommend" the City, and 6% indicated they would "definitely not recommend" the City as a place to live.

Q29. Whether Residents Would Recommend the City of Miami Beach to Family and Friends as a Place to Live
by percentage of respondents (excluding "don't know")

- Definitely recommend 38%
- Probably recommend 36%
- Definitely not recommend 6%
- Probably not recommend 21%
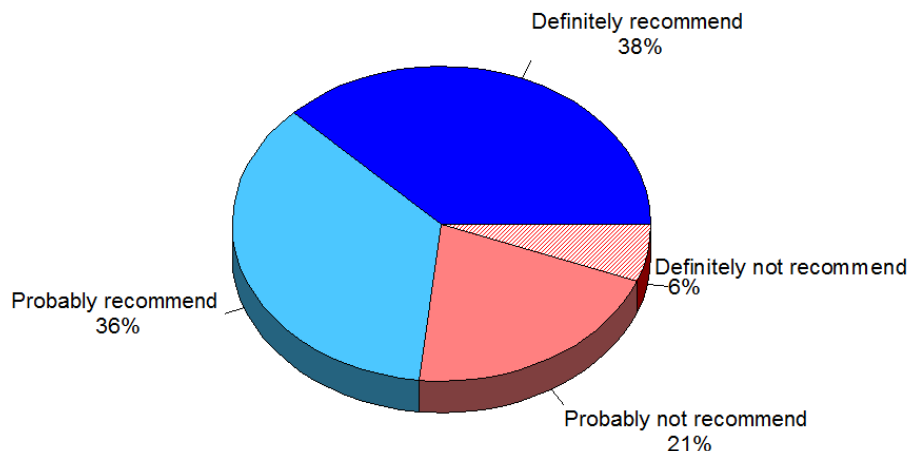
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

OTHER FINDINGS: BUSINESS SURVEY

Satisfaction Among Businesses with City Inspections

- Seventy-six percent (76%) of respondents who indicated their business had been inspected the during the previous 12 months were "very satisfied" or "satisfied" with the consistency and fairness of City inspections; 14% were "neither satisfied nor dissatisfied, and 9% were "dissatisfied" or "very dissatisfied."

Q3-2. Satisfaction With the Consistency and Fairness of City Inspections
by percentage of businesses that have been inspected during the past 12 months (<u>excluding "don't know"</u>)

Very satisfied
38%

Very dissatisfied
2%

Dissatisfied
7%

14%
Neither satisfied
nor dissatisfied

Satisfied
38%
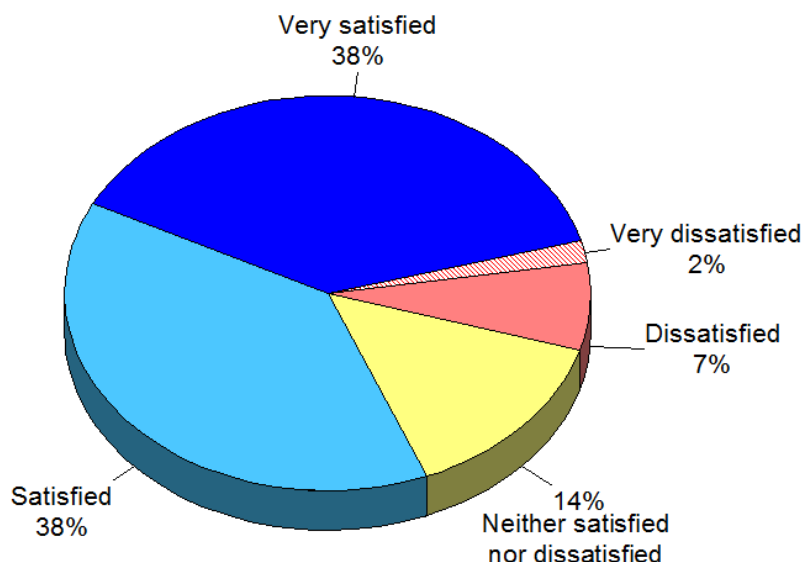
Source: ETC Institute (2016 - Miami Beach Business Survey)

Satisfaction Among Businesses with the City's Planning Department

- Seventy percent (70%) of business respondents who had been in contact with the Planning Department during the past 3 years "strongly agreed" or "agreed" that the employees who provided assistance were courteous and professional; 65% "strongly agreed" or "agreed" that employees have had proper training, and 63% "strongly agreed" or "agreed" that Planning Department employees possess proper knowledge. The statement that business respondents agreed with the least was "it is easy to get a hold of someone in the Planning Department" (46% "strongly agreed" or "agreed").

Satisfaction Among Businesses with the City's Building Department

- Sixty-nine percent (69%) of business respondents who had been in contact with the Building Department during the past 3 years "strongly agreed" or "agreed" that the employees who provided assistance were courteous and professional; 62% "strongly agreed" or "agreed" that employees have had proper training, and 60% "strongly agreed" or "agreed" that Building Department employees possess proper knowledge. The statement that business respondents agreed with the least was "I was served in a timely manner" (40% "strongly agreed" or "agreed").

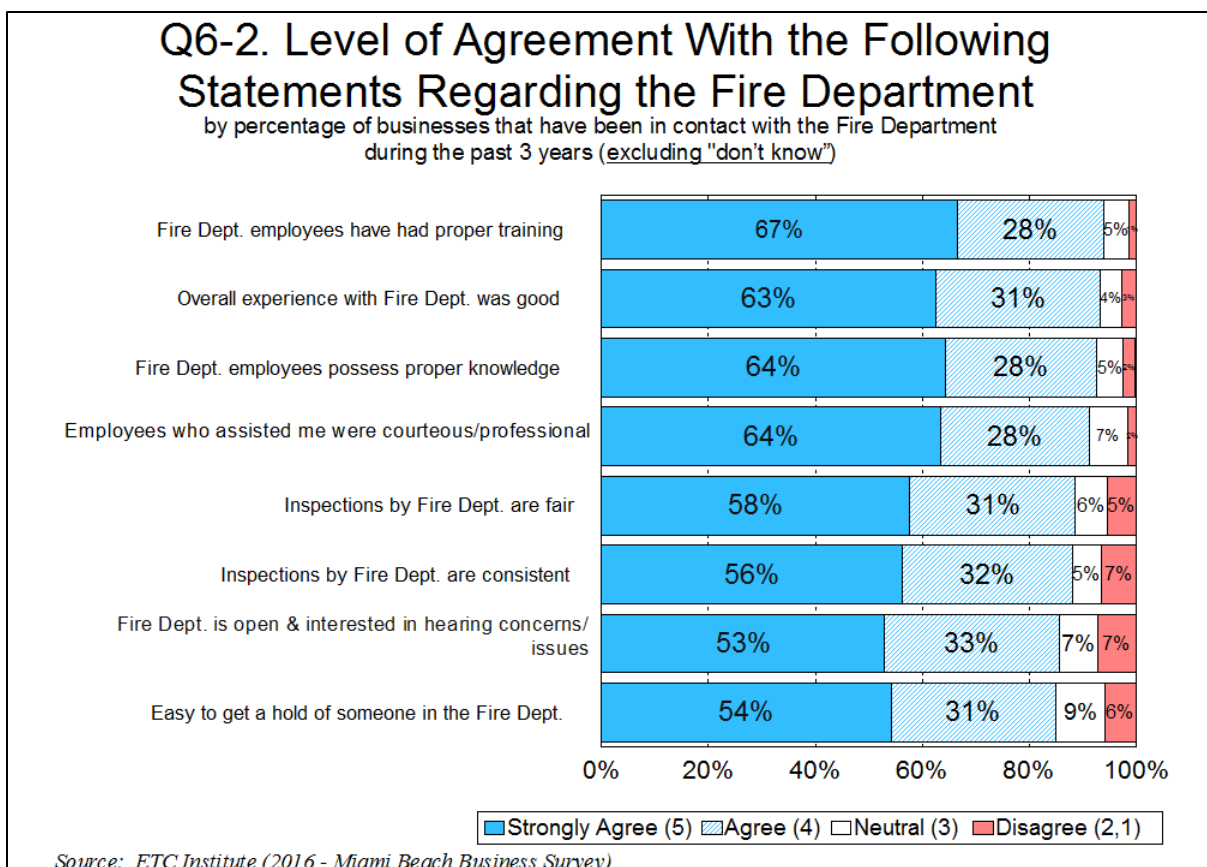**Satisfaction Among Businesses with the City's Fire Department**

- Ninety-five percent (95%) of business respondents who had been in contact with the Fire Department during the past 3 years "strongly agreed" or "agreed" that the employees have had proper training; 94% "strongly agreed" or "agreed" that their overall experience with the Fire Department was good, and 92% "strongly agreed" or "agreed" that Fire Department employees possess proper knowledge. The statement that business respondents agreed with the least was "it is easy to get a hold of someone in the Fire Department (85% "strongly agreed" or "agreed").

Q6-2. Level of Agreement With the Following Statements Regarding the Fire Department

by percentage of businesses that have been in contact with the Fire Department during the past 3 years (excluding "don't know")

Statement	Strongly Agree (5)	Agree (4)	Neutral (3)	Disagree (2,1)
Fire Dept. employees have had proper training	67%	28%	5%	
Overall experience with Fire Dept. was good	63%	31%	4%	
Fire Dept. employees possess proper knowledge	64%	28%	5%	
Employees who assisted me were courteous/professional	64%	28%	7%	
Inspections by Fire Dept. are fair	58%	31%	6%	5%
Inspections by Fire Dept. are consistent	56%	32%	5%	7%
Fire Dept. is open & interested in hearing concerns/ issues	53%	33%	7%	7%
Easy to get a hold of someone in the Fire Dept.	54%	31%	9%	6%

Source: ETC Institute (2016 - Miami Beach Business Survey)

How Businesses Feel About the Number of Amenities in the City

- Thirty-seven percent (37%) of business respondents feel there are too many bars and nightclubs in Miami Beach, while 46% believe there are too few museums in the City. Sixty-seven percent (67%) of business respondents feel there is the right amount of major events in Miami Beach.

Perceived Impact of the Miami Beach Convention Center and Tourism Industry on Businesses
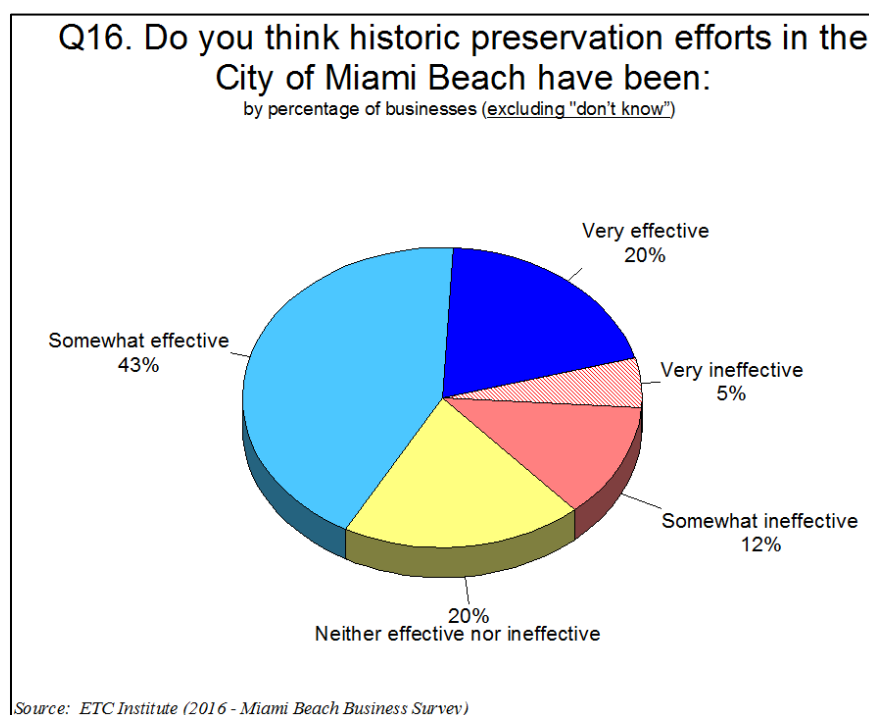
- Fifty-four percent (54%) of business respondents think the Miami Beach Convention Center adds to the success of their business, while 72% think the tourism industry in the City adds to the success of their business.

Support for Spending Tax Dollars to Address Rising Sea Levels

- Eighty-nine percent of businesses support spending tax dollars to address rising sea levels in the City, while 11% oppose the spending.

Perceived Effectiveness of Historic Preservation Efforts in Miami Beach

- Sixty-three percent (63%) of business respondents think historic preservation efforts in the City of Miami Beach have been "very effective" or "somewhat effective;" 20% think efforts have been "neither effective nor ineffective," and 17% of business respondents think historic preservation efforts in the City have been "somewhat ineffective" or "very ineffective."

Q16. Do you think historic preservation efforts in the City of Miami Beach have been: by percentage of businesses (excluding "don't know")

Very effective 20%
Very ineffective 5%
Somewhat ineffective 12%
Neither effective nor ineffective 20%
Somewhat effective 43%

Source: ETC Institute (2016 - Miami Beach Business Survey)

How Miami Beach Compares to Other Communities

Overall Satisfaction with Quality of Life. Residents of Miami Beach are generally satisfied with quality of life in the City: 67% were either "very satisfied" or "satisfied." However, satisfaction among residents is 10 points below the Florida average (77%) and 8 points below the national average (75%).

Satisfaction with Specific Areas. The City of Miami Beach rated at or above the Florida averages in 4 of the 12 areas that were assessed on the survey, and rated at or above the national average in 5 areas. The individual areas where Miami Beach ranked above the Florida average among other **Florida communities** are listed below:

- Fire services (+4%)
- City recreation programs (+1%)
- How well the City is planning for the future (+1%)

The individual areas where Miami Beach ranked above the national average among other **U.S. communities** are listed below:

- Fire services (+5%)
- City recreation programs (+3%)
- Codes and ordinances (+2%)
- Stormwater drainage (+1%)
- City's website (+1%)

OPPORTUNITIES FOR IMPROVEMENT

In order to help the City identify opportunities for improvement, ETC Institute conducted an Importance-Satisfaction (I-S) Priorities Analysis. This analysis examined the importance that residents and businesses placed on each City service and the level of satisfaction with each service. By identifying services of high importance and low satisfaction, the analysis identified which services will have the most impact on overall satisfaction with City services in the future. If the City wants to improve its overall satisfaction rating, the City should prioritize improvements in services with the highest Importance-Satisfaction (I-S) ratings. Details regarding the methodology for the analysis are provided in the Importance-Satisfaction section of this report.

Based on the results of the Importance-Satisfaction (I-S) Priorities Analysis, ETC Institute recommends the following:

- **<u>Overall Priorities for the City - RESIDENTS.</u>** This analysis reviewed the importance of and satisfaction with major categories of City services, and was conducted to help set the overall priorities for the City. Based on the results of this analysis, the major services that are recommended by residents as the top opportunities for improvement in order to raise the City's overall satisfaction rating are listed below in descending order of the Importance-Satisfaction rating:

    - The job the City is doing to address homelessness
    - Cleanliness of neighborhood streets
    - Efforts to manage stormwater drainage and flooding
    - Cleanliness of canals/waterways
    - Performance in addressing needs of residents
    - Quality of Police services

Importance-Satisfaction Rating
City of Miami Beach Resident Survey
OVERALL

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS .10-.20)						
The job City is doing to address homelessness	24%	5	24%	31	0.1832	1
Cleanliness of streets in your neighborhood	39%	1	61%	19	0.1517	2
Efforts to manage stormwater drainage/flooding	28%	3	46%	26	0.1496	3
Cleanliness of canals/waterways	20%	6	40%	28	0.1188	4
Performance in addressing needs of residents	20%	7	41%	27	0.1156	5
Quality of Police services	33%	2	66%	14	0.1112	6
Medium Priority (IS <.10)						
Condition of sidewalks	15%	11	38%	29	0.0955	7
Cleanliness of streets in business/commercial areas	18%	10	51%	24	0.0858	8
Overall quality of the beaches	27%	4	69%	12	0.0837	9
Availability of Police in your neighborhood	18%	8	69%	11	0.0558	10
Clean-up of litter/debris on private property	11%	15	47%	25	0.0557	11
Cleanliness/maintenance of public beach restrooms	7%	19	24%	32	0.0494	12
Garbage/trash collection	14%	12	66%	15	0.0476	13
Cleanliness and maintenance of public restrooms	6%	20	27%	30	0.0445	14
Adequacy of street lighting in neighborhood	12%	13	64%	17	0.0443	15
Quality of customer service provided by the City	8%	16	54%	22	0.0386	16
Maintenance of rights of way along City streets	7%	17	57%	21	0.0297	17
Quality of Emergency Medical Services	18%	9	84%	3	0.0283	18
City meeting expectations with services provided	5%	23	52%	23	0.0226	19
How easy it is to get info about City services	4%	24	58%	20	0.0160	20
Emergency/Hurricane Preparedness efforts	7%	18	77%	5	0.0152	21
Quality of City recreation programs	5%	22	72%	9	0.0137	22
Variety of City recreation programs	3%	25	64%	16	0.0119	23
Quality of Fire services	12%	14	92%	1	0.0097	24
Cleanliness/maintenance of public garages	3%	27	63%	18	0.0093	25
Quality of City recreational facilities	3%	26	70%	10	0.0090	26
Ocean Rescue/Lifeguard/Beach Patrol services	5%	21	85%	2	0.0077	27
Amount of City recreation programs	2%	29	66%	13	0.0068	28
Appearance of playgrounds	2%	28	76%	7	0.0058	29
Appearance/maintenance of City's public buildings	2%	30	79%	4	0.0036	30
Condition of City athletic fields	1%	31	77%	6	0.0023	31
Appearance of City pools	1%	32	74%	8	0.0021	32

- **Overall Priorities for the City - BUSINESSES.** This analysis reviewed the importance of and satisfaction with major categories of City services, and was conducted to help set the overall priorities for the City. Based on the results of this analysis, the major services that are recommended by businesses as the top opportunities for improvement in order to raise the City's overall satisfaction rating are listed below in descending order of the Importance-Satisfaction rating:

  - ➢ The job the City is doing to address homelessness
  - ➢ Condition of City roads in Miami Beach
  - ➢ Cleanliness of streets near business
  - ➢ City's efforts to manage stormwater

Importance-Satisfaction Rating
City of Miami Beach Business Survey
OVERALL

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS .10-.20)						
The job City is doing to address homelessness	30%	4	35%	19	0.1944	1
Condition of City roads in Miami Beach	28%	5	51%	18	0.1392	2
Cleanliness of streets near your business	34%	2	68%	13	0.1101	3
City's efforts to manage stormwater	24%	7	54%	17	0.1099	4
Medium Priority (IS <.10)						
Police services	47%	1	79%	9	0.0995	5
Condition of sidewalks (few or no cracks)	16%	10	62%	15	0.0593	6
Cleanliness of canals/waterways	12%	14	57%	16	0.0499	7
Cleanliness of streets in business/commercial areas	20%	9	75%	10	0.0495	8
City efforts to keep businesses informed	14%	11	65%	14	0.0476	9
Overall quality of the beaches	22%	8	82%	7	0.0394	10
Garbage/trash collection	13%	12	71%	12	0.0368	11
Overall quality of customer service	12%	13	71%	11	0.0345	12
Emergency medical services	33%	3	91%	2	0.0293	13
Fire services	25%	6	95%	1	0.0123	14
Landscape maintenance in right of way	6%	17	80%	8	0.0114	15
Maintenance of parks	8%	15	87%	5	0.0107	16
City's emergency/hurricane preparedness	7%	16	88%	4	0.0088	17
Ocean rescue/lifeguard/beach patrol	5%	18	90%	3	0.0049	18
Appearance/maintenance of City's public bldgs	3%	19	87%	6	0.0035	19

Section 1-1:
Resident Survey
Charts & Graphs

Q1. Overall Ratings for the City of Miami Beach
by percentage of respondents (excluding "don't know")

Category	Excellent (4)	Good (3)	Fair (2)	Poor (1)
Quality of Fire services	42%	50%	8%	
Ocean Rescue/Lifeguard/Beach Patrol services	36%	49%	12%	3%
Quality of Emergency Medical Services	37%	47%	12%	4%
Appearance/maintenance of City's public buildings	20%	59%	20%	
Emergency/Hurricane Preparedness efforts	27%	50%	18%	5%
Condition of City athletic fields	23%	54%	18%	5%
Appearance of playgrounds	20%	56%	20%	4%
Appearance of City pools	22%	52%	22%	4%
Quality of City recreation programs	22%	50%	23%	6%
Quality of City recreational facilities	19%	51%	24%	7%
Availability of Police in your neighborhood	26%	43%	21%	10%
Overall quality of the beaches	20%	49%	24%	8%
Amount of City recreation programs	20%	46%	25%	9%
Quality of Police services	22%	44%	23%	12%
Garbage/trash collection	19%	47%	25%	10%
Variety of City recreation programs	20%	44%	26%	10%

Legend: ■ Excellent (4) ▨ Good (3) □ Fair (2) ■ Poor (1)

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q1. (cont.) Overall Ratings for the City of Miami Beach
by percentage of respondents (excluding "don't know")

Category	Excellent (4)	Good (3)	Fair (2)	Poor (1)
Adequacy of street lighting in neighborhood	18%	46%	24%	12%
Cleanliness and maintenance of public garages	12%	51%	29%	8%
Cleanliness of streets in your neighborhood	19%	42%	26%	13%
How easy it is to get info about City services	16%	42%	30%	13%
Maintenance of rights of way along City streets	11%	46%	30%	13%
Quality of customer service provided by the City	10%	44%	35%	12%
City meeting expectations with services provided	9%	43%	35%	13%
Cleanliness of streets in business/commercial area	11%	40%	33%	16%
Enforcement of codes & ordinances related to the clean-up of litter and debris on private property	11%	36%	28%	26%
Efforts to manage stormwater drainage/flooding	13%	33%	32%	22%
City's performance in addressing needs of residents, noise and disturbances during events that attract large crowds to Miami Beach	10%	31%	29%	30%
Cleanliness of canals/waterways	7%	33%	38%	22%
Condition of sidewalks	7%	31%	38%	24%
Cleanliness and maintenance of public restrooms	4%	23%	44%	29%
The job City is doing to address homelessness	5%	19%	29%	47%
Cleanliness and maintenance of public beach restrooms	3%	21%	42%	34%

Legend: ■ Excellent (4) ▨ Good (3) □ Fair (2) ■ Poor (1)

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q2. Services That Are Most Important for the City to Provide

by percentage of respondents who selected the item as one of their top five choices

Service	Percentage
Cleanliness of streets in your neighborhood	39%
Quality of Police services	33%
Efforts to manage stormwater drainage/flooding	28%
Overall quality of the beaches	27%
The job City is doing to address homelessness	24%
Cleanliness of canals/waterways	20%
City's performance in addressing needs of residents, noise and disturbances during events that attract large crowds to Miami Beach	20%
Availability of Police in your neighborhood	18%
Quality of Emergency Medical Services	18%
Cleanliness of streets in business/commercial areas	18%
Condition of sidewalks	15%
Garbage/trash collection	14%
Adequacy of street lighting in neighborhood	12%
Quality of Fire services	12%
Enforcement of codes & ordinances related to the clean-up of litter and debris on private property	11%
Quality of customer service provided by the City	8%

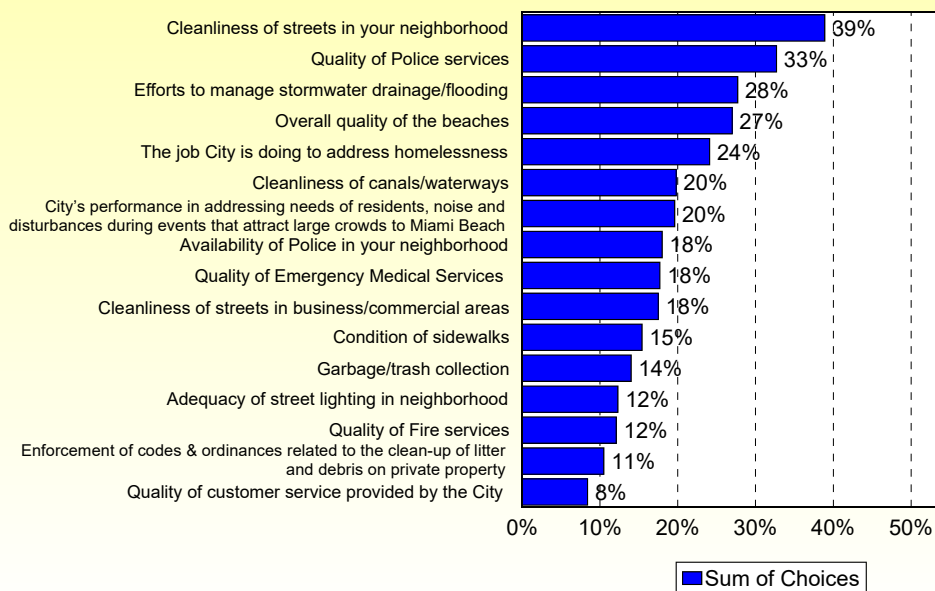■ Sum of Choices

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

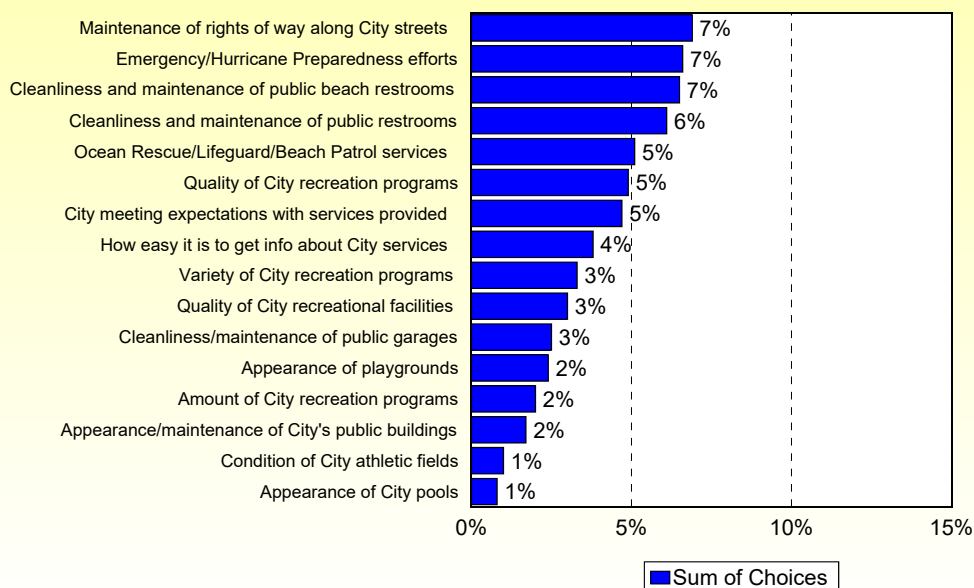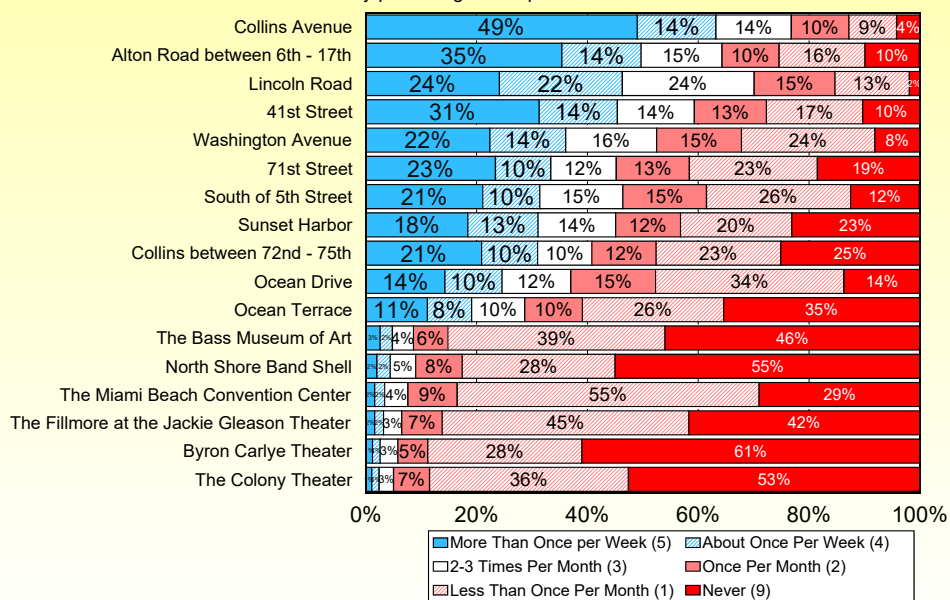## Q2. (cont.) Services That Are Most Important for the City to Provide

by percentage of respondents who selected the item as one of their top five choices

Service	Percentage
Maintenance of rights of way along City streets	7%
Emergency/Hurricane Preparedness efforts	7%
Cleanliness and maintenance of public beach restrooms	7%
Cleanliness and maintenance of public restrooms	6%
Ocean Rescue/Lifeguard/Beach Patrol services	5%
Quality of City recreation programs	5%
City meeting expectations with services provided	5%
How easy it is to get info about City services	4%
Variety of City recreation programs	3%
Quality of City recreational facilities	3%
Cleanliness/maintenance of public garages	3%
Appearance of playgrounds	2%
Amount of City recreation programs	2%
Appearance/maintenance of City's public buildings	2%
Condition of City athletic fields	1%
Appearance of City pools	1%

■ Sum of Choices

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

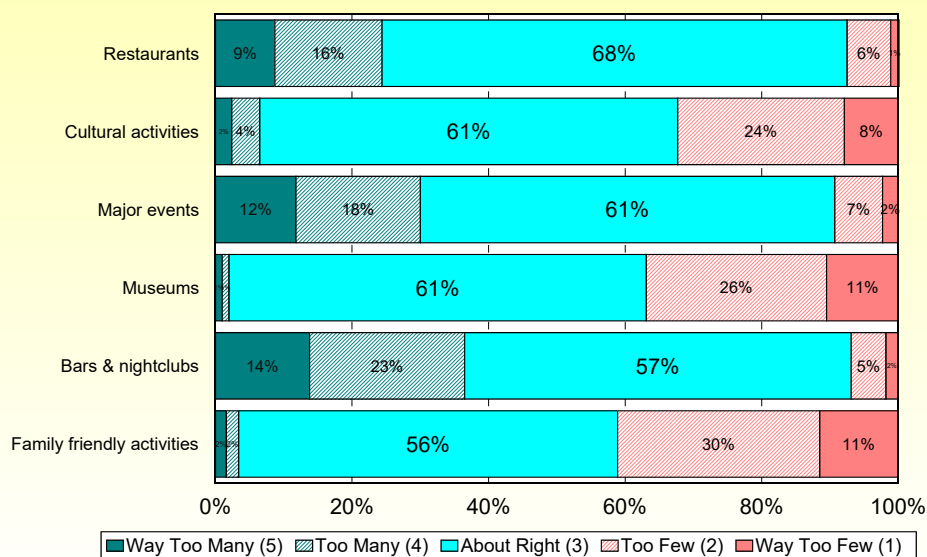## Q3. How Often Residents Use or Visit the Following Areas or Facilities
by percentage of respondents

Area/Facility	More Than Once per Week (5)	About Once Per Week (4)	2-3 Times Per Month (3)	Once Per Month (2)	Less Than Once Per Month (1)	Never (9)
Collins Avenue	49%	14%	14%	10%	9%	4%
Alton Road between 6th - 17th	35%	14%	15%	10%	16%	10%
Lincoln Road	24%	22%	24%	15%	13%	2%
41st Street	31%	14%	14%	13%	17%	10%
Washington Avenue	22%	14%	16%	15%	24%	8%
71st Street	23%	10%	12%	13%	23%	19%
South of 5th Street	21%	10%	15%	15%	26%	12%
Sunset Harbor	18%	13%	14%	12%	20%	23%
Collins between 72nd - 75th	21%	10%	10%	12%	23%	25%
Ocean Drive	14%	10%	12%	15%	34%	14%
Ocean Terrace	11%	8%	10%	10%	26%	35%
The Bass Museum of Art	3%	4%	6%		39%	46%
North Shore Band Shell	2%	5%	8%		28%	55%
The Miami Beach Convention Center	2%	4%	9%		55%	29%
The Fillmore at the Jackie Gleason Theater	3%	3%	7%		45%	42%
Byron Carlye Theater	3%	3%	5%		28%	61%
The Colony Theater	1%	3%	7%		36%	53%

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q4. How Residents Feel About the Number of the Following Amenities in the City of Miami Beach
by percentage of respondents (excluding "don't know")

Amenity	Way Too Many (5)	Too Many (4)	About Right (3)	Too Few (2)	Way Too Few (1)
Restaurants	9%	16%	68%	6%	
Cultural activities	2%	4%	61%	24%	8%
Major events	12%	18%	61%	7%	2%
Museums	2%		61%	26%	11%
Bars & nightclubs	14%	23%	57%	5%	2%
Family friendly activities	2%	2%	56%	30%	11%

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q5. Feeling of Safety in Miami Beach
by percentage of respondents (excluding "don't know")

Category	Very Safe (5)	Safe (4)	Somewhat Safe (3)	Unsafe (2,1)
In neighborhoods during the day	56%	34%	8%	
In neighborhoods during the evening/night	30%	38%	23%	9%
In City parks that currently have Park Rangers during park hours (*Flamingo, N. Shore Open Space, S. Shore Park*)	21%	39%	27%	12%
In entertainment areas	16%	43%	31%	10%
In business/commercial areas during evening/night	15%	39%	34%	12%
During special events	15%	35%	30%	20%

Legend: ■ Very Safe (5) ▨ Safe (4) □ Somewhat Safe (3) ■ Unsafe (2,1)

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q6. Level of Agreement With the Following Statements
by percentage of respondents (excluding "don't know")

Statement	Strongly Agree (5)	Agree (4)	Neutral (3)	Disagree (2,1)
I have observed coastal water level increases	37%	39%	17%	6%
I have observed increase flooding	38%	36%	16%	10%
I have taken steps to make my house more energy efficient	26%	46%	21%	7%
I have observed increased weather temperatures	32%	37%	22%	9%
I would like to see more trees in my neighborhood	38%	31%	21%	9%
I am informed about local climate change issues	22%	44%	20%	14%
I know where to get information during an emergency	20%	45%	18%	17%
I have taken steps to make my house more water efficient	22%	42%	26%	10%
Household is prepared with food/water/supplies for emergency	18%	40%	24%	19%
Waste diversion programs have reduced garbage I place in my trash can	21%	37%	26%	17%
I am satisfied with amount of tree canopy coverage	7%	29%	25%	40%
It's easy to obtain permits for sustainable construction	4%	16%	32%	49%

Legend: ■ Strongly Agree (5) ▨ Agree (4) □ Neutral (3) ■ Disagree (2,1)

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q7. Satisfaction With Various <u>Perceptions</u> of the City
by percentage of respondents (<u>excluding "don't know"</u>)

Category	Very Satisfied (5)	Satisfied (4)	Neutral (3)	Dissatisfied (2,1)
City of Miami Beach as a place to live	24%	46%	18%	12%
Quality of life within City of Miami Beach	16%	51%	19%	14%
Overall image of the City	14%	52%	19%	15%
Professionalism of employees who respond to emergencies	18%	42%	26%	15%
Miami Beach trolley	22%	36%	26%	16%
Capital improvement projects recently completed	14%	42%	32%	13%
Availability of green space near home	14%	38%	24%	24%
City efforts to prepare for disasters	9%	41%	34%	17%
Quality of local schools within Miami Beach	13%	35%	31%	21%
Storm drainage improvements	12%	35%	27%	27%
City efforts to prevent crime	8%	36%	28%	28%
City efforts to be a "green" or sustainable City	10%	34%	34%	22%
Availability of recycling in public places	9%	31%	28%	32%
City efforts to plan for growth	8%	32%	22%	38%
City efforts to prepare for the future	8%	29%	33%	29%
Value received for City taxes paid	7%	29%	34%	30%
City regulation of residential development	5%	24%	26%	45%
City regulation of commercial development	5%	23%	28%	45%

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q7-3. Factors Residents Are Dissatisfied With Regarding the Miami Beach Trolley
by percentage of respondents who were dissatisfied with the Miami Beach Trolley
(multiple selections could be made)

Factor	Percentage
Stop amenities (bus bench, shelter, etc.)	25%
Reliability	22%
Customer Service	14%
Cleanliness	13%
Maintenance	9%
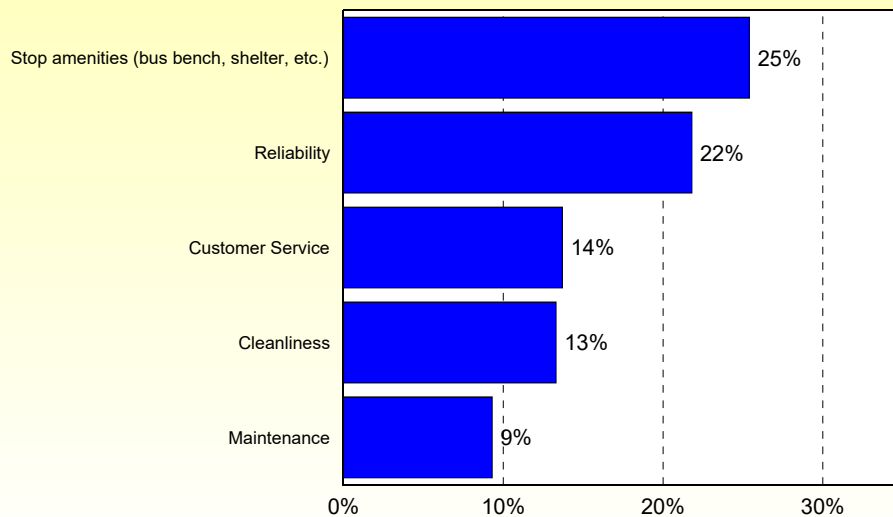
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q8. Capital Improvement Projects That Are Most Important to Residents
by percentage of respondents (multiple selections could be made)

Project	Percentage
Stormwater & drainage improvements	64%
More walking/biking friendly streets/greenways	56%
Water & sewer system improvements	50%
Roadways pavement improvements	43%
Park improvements	29%
Bridge improvements	13%
Waterway dredging	11%
City facility improvements	8%
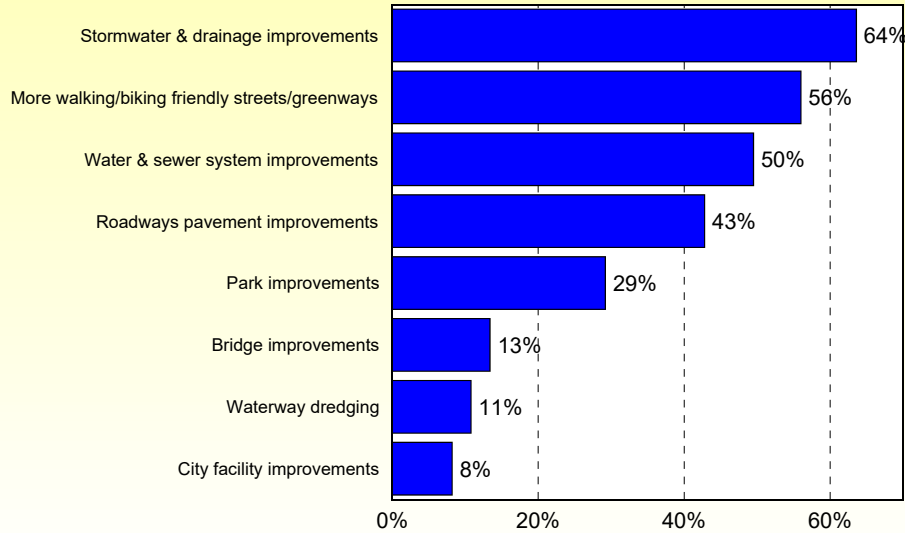
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q9. Support for Spending Tax Dollars to Address Rising Sea Levels
by percentage of respondents (excluding "don't know")

Support 89%

Oppose 11%
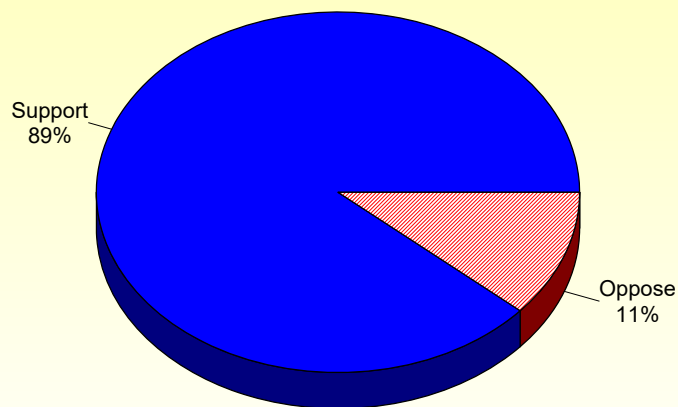
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q10. Perceived Level of <u>Code Enforcement and Ordinance</u> in Neighborhoods
by percentage of respondents (<u>excluding "don't know"</u>)

About right
53%

Too much/too restrictive
17%

30%
Too little/not restrictive enough
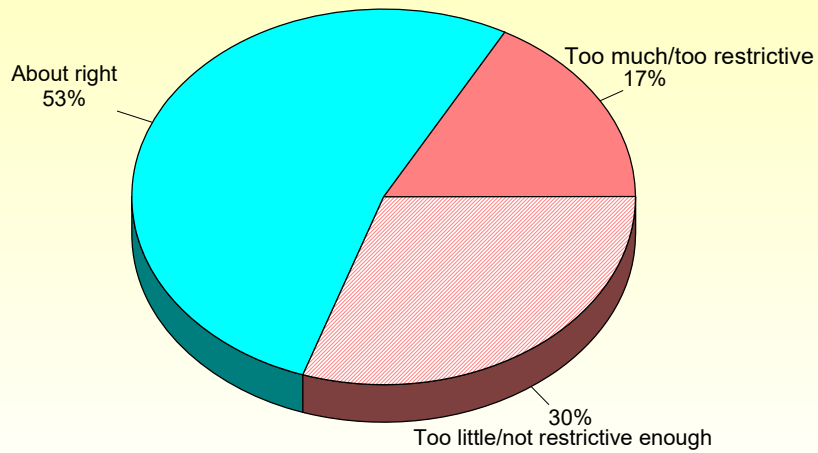
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q11. Perceived Amount of <u>Noise</u> in Neighborhoods
by percentage of respondents (<u>excluding "don't know"</u>)

Acceptable/not a problem
66%

Way too much
14%

A bit too much
20%
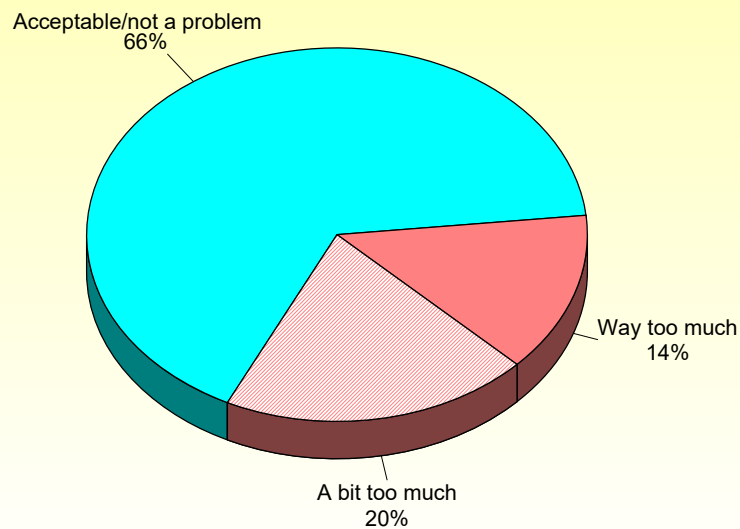
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q13. What Residents Think About Historic Preservation Efforts in the City of Miami Beach
by percentage of respondents (excluding "don't know")

Very effective
22%

Somewhat effective
46%

Very ineffective
9%

Somewhat ineffective
13%

11%
Neither effective nor ineffective
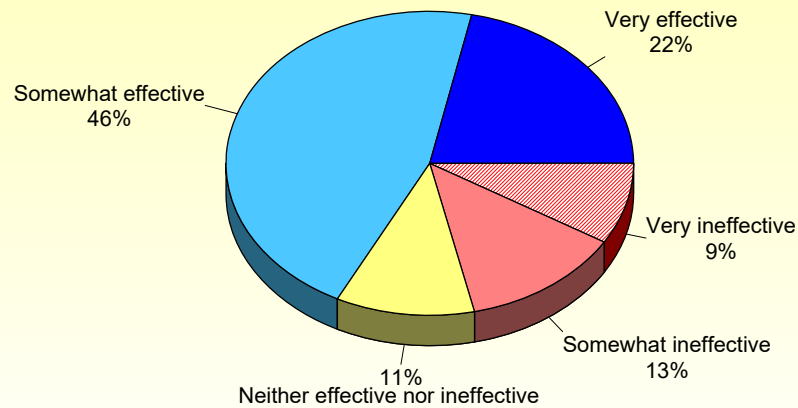
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q14. Primary Mode of Transportation in Miami Beach
by percentage of respondents (excluding "not provided")

Car/automobile
69%

Other
1%

Motorcycle/scooter
3%

Public transportation
7%

Biking
7%

Walking
14%
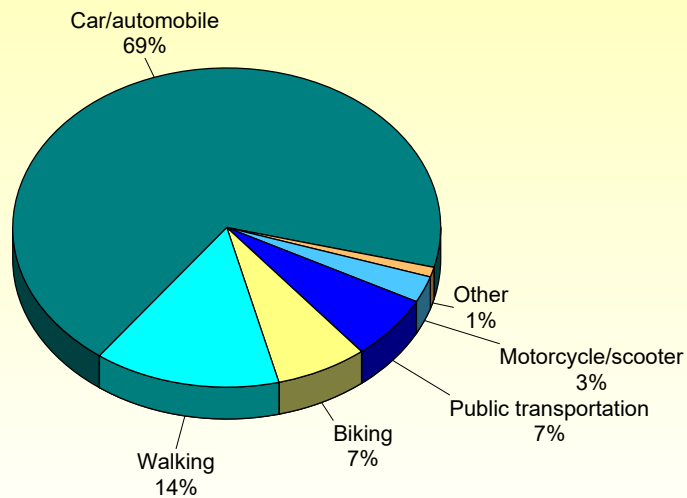
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q15. Perceived Availability of Parking in the City
by percentage of respondents (excluding "don't know")

Too little
69%

Too much
1%

About right
30%
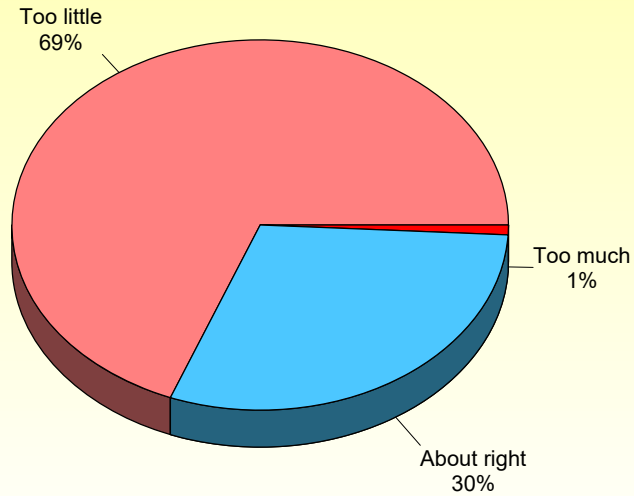
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q16. Ratings of Traffic Flow in the City
by percentage of respondents (excluding "don't know")

Fair
33%

Good
7%

Excellent
1%

Poor
59%
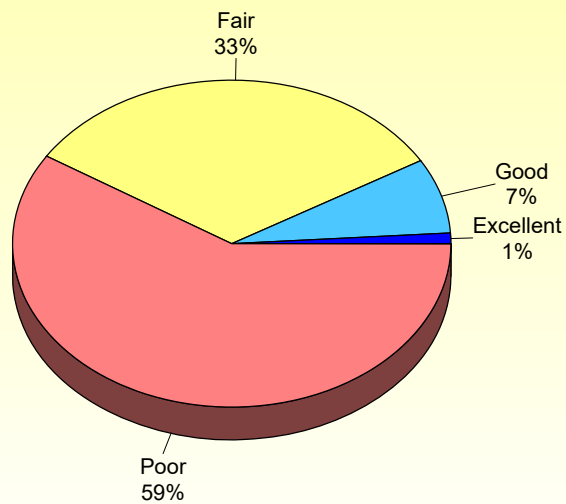
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q17. Types of Transportation Residents Would Consider Using as an Alternative to Taking a Car
by percentage of respondents (excluding "don't know" - multiple selections could be made)

Type	Percentage
Light rail/modern street car	45%
Trolley car	44%
Bicycles	43%
Local bus circulators	38%
Express bus to mainland	23%
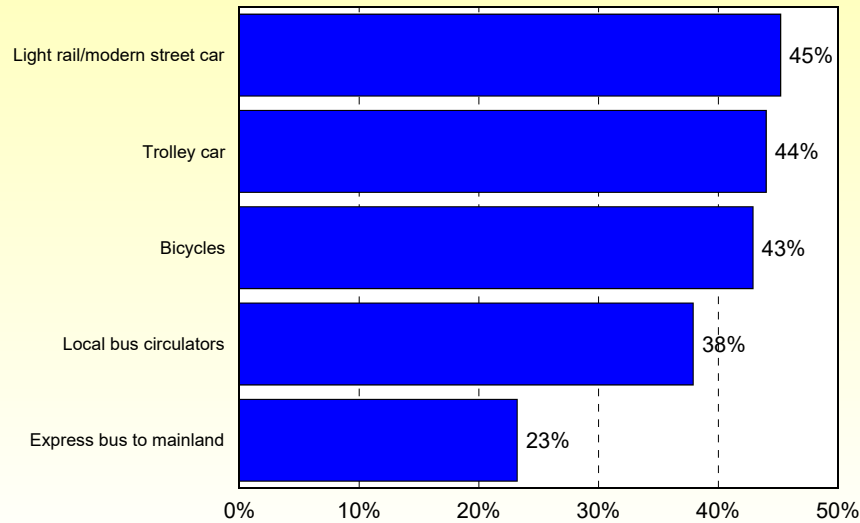
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q17-2. Does anyone in your household regularly ride a bicycle?
by percentage of respondents (excluding "not provided")

Yes
47%

No
53%
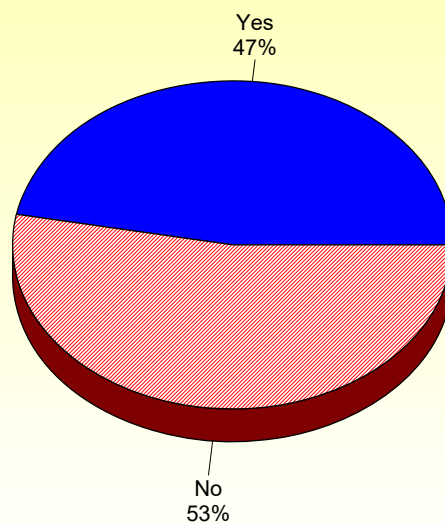
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q17-3. Level of Bicycle Safety in the City of Miami Beach
by percentage of respondents (excluding "don't know")

Safe
28%

Very safe
2%

Very unsafe
25%

Unsafe
46%
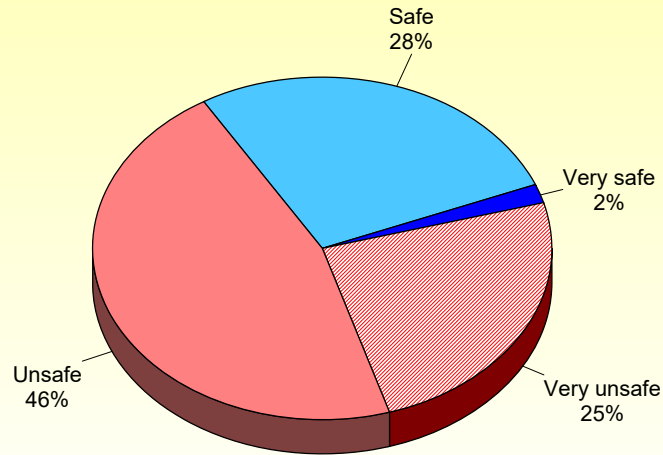
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q18. Perceived Availability of Bicycle Paths/Lanes Throughout the City
by percentage of respondents (excluding "don't know")

There are too few
69%

There are too many
7%

Number is about right
25%
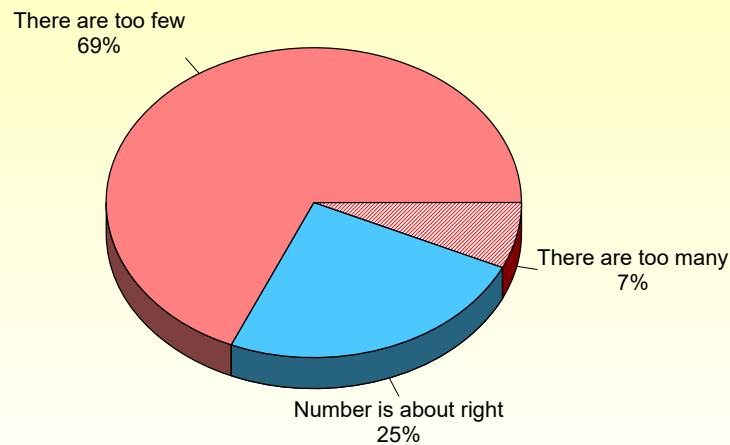
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q19. Items Residents Are Willing to Support the Development of With Regard to the City Significantly Reducing the Number of On-Street Parking Spaces on Main Streets in Miami Beach
by percentage of respondents (excluding "don't know" - multiple selections could be made)

Item	Percentage
Bike lanes	49%
More shade trees/landscaping	47%
Rapid transit or express train	44%
Trolley cars	32%
Wider sidewalks	27%
More lanes for vehicle (cars)	22%
Bus lanes	17%
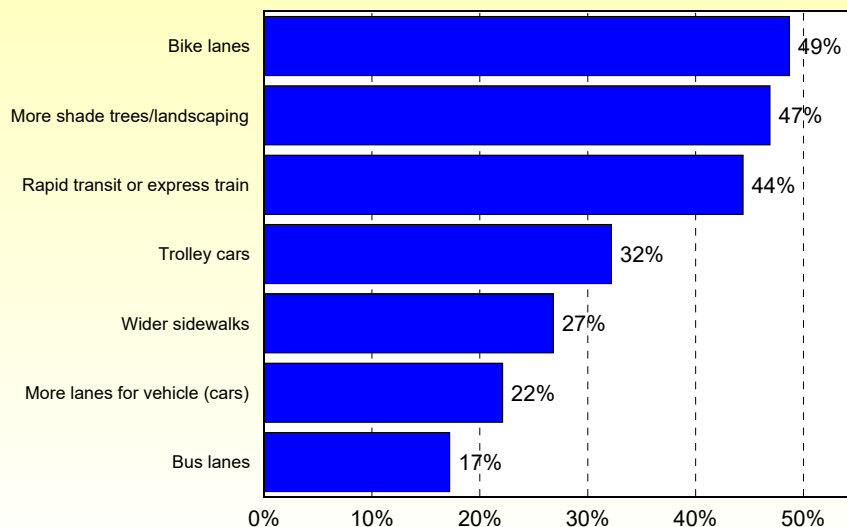
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q20. Sources That Residents Utilize to Obtain Information About City Government, Issues, and Events
by percentage of respondents (multiple selections could be made)

Source	Percentage
MB Magazine	53%
City Website (www.miamibeachfl.gov)	46%
City e-mail news	24%
Facebook	20%
Other news media	18%
MBTV (City's TV Govt. channel)	11%
Via HOA's or other civic groups	8%
Twitter	5%
Radio (1670 am)	5%
Forums/workshops/meetings	5%
City's E-Gov app	5%
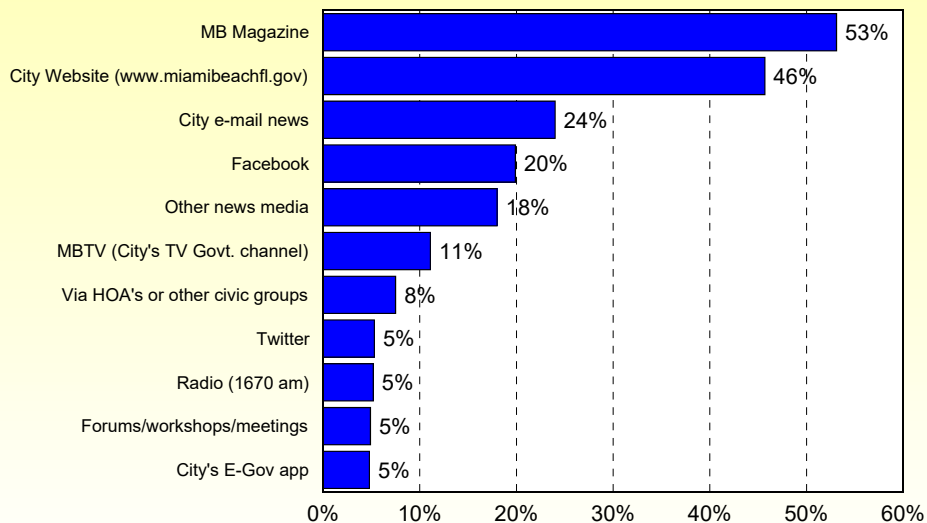
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q21. Usefulness of Information the City of Miami Beach Sends to Residents About City Programs, Activities, Policies and Events

by percentage of respondents

Very useful
32%

Not useful at all
9%

Somewhat useful
59%
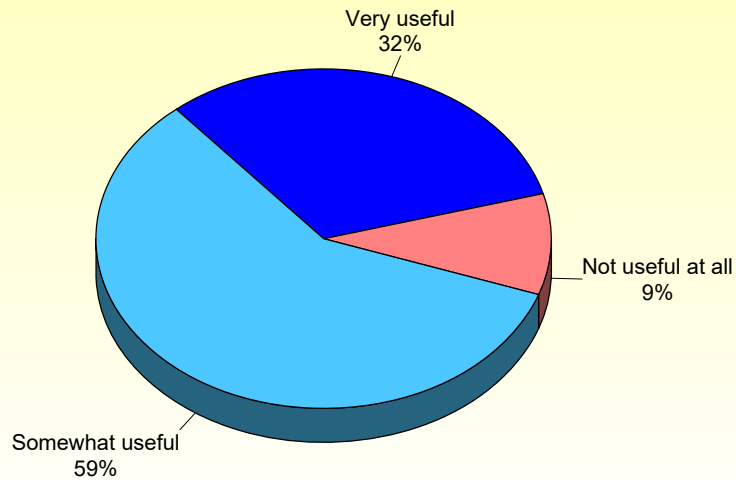
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q22. Resident Access to the Police Department's Social Media Platforms in the Past 6 Months

by percentage of respondents (multiple selections could be made)

Facebook — 8%

Twitter — 5%

Have not accessed — 89%

0%   20%   40%   60%   80%   100%
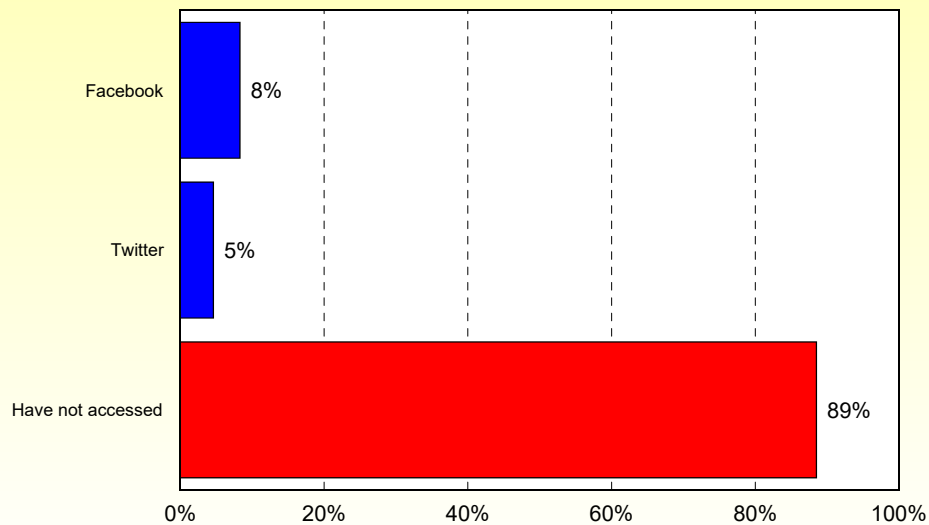
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q22-2. Usefulness of Information Provided by the City of Miami Beach Police Department's Social Media Platforms

by percentage of respondents who used the Police Department's social media platforms

Very useful
34%

Not useful at all
11%

Somewhat useful
56%
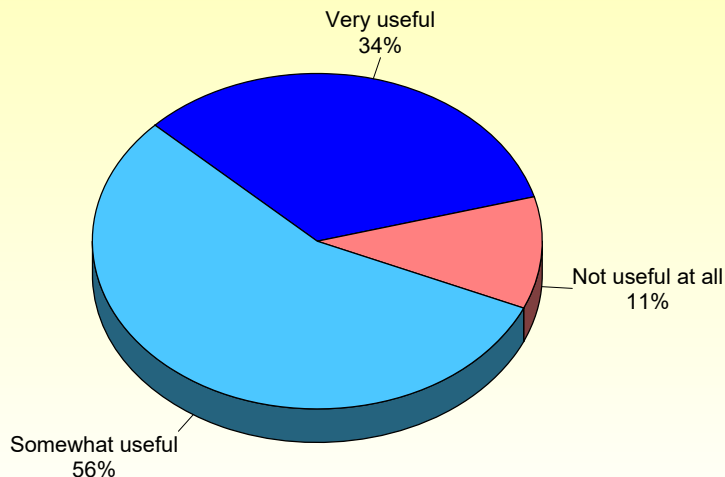
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q23. Satisfaction with Communication

by percentage of respondents (excluding "don't know")

	Very Satisfied (5)	Satisfied (4)	Neutral (3)	Dissatisfied (2,1)
MB Magazine	30%	44%	22%	4%
Email news	21%	40%	32%	8%
Website	14%	44%	33%	9%
Social media engagement (Twitter, Facebook)	11%	38%	43%	8%
MBTV (City's government channel)	13%	32%	45%	10%
E-Gov app	13%	25%	50%	12%

0%   20%   40%   60%   80%   100%
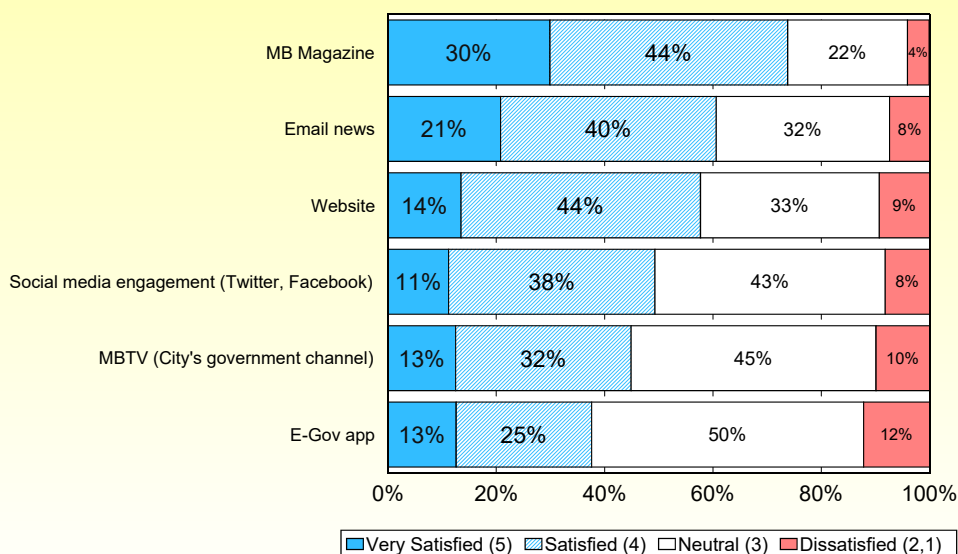
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q24. How Many Times Residents Have Personally Contacted the City With a Question, Service Request or Complaint in the Last 12 Months
by percentage of respondents (excluding "don't know")

5 or less
87%

21+
2%

16 to 20
1%

11 to 15
2%

6 to 10
8%
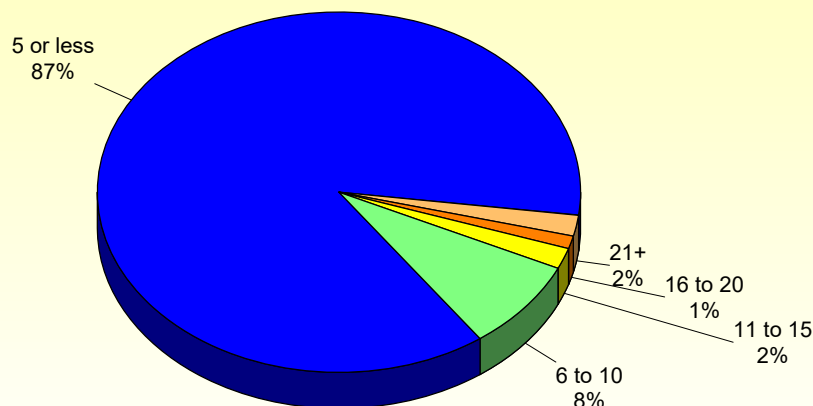
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q24-2. Reasons for Most Recent Contact With the City
by percentage of respondents who contacted the City in the last 12 months
(excluding "not applicable/don't remember")

Visit an elected official
5%

Pay a bill
13%

Other
20%

Research an issue
20%

File a complaint
25%

Pull a building permit/plan review
10%

Attend a program/event
7%
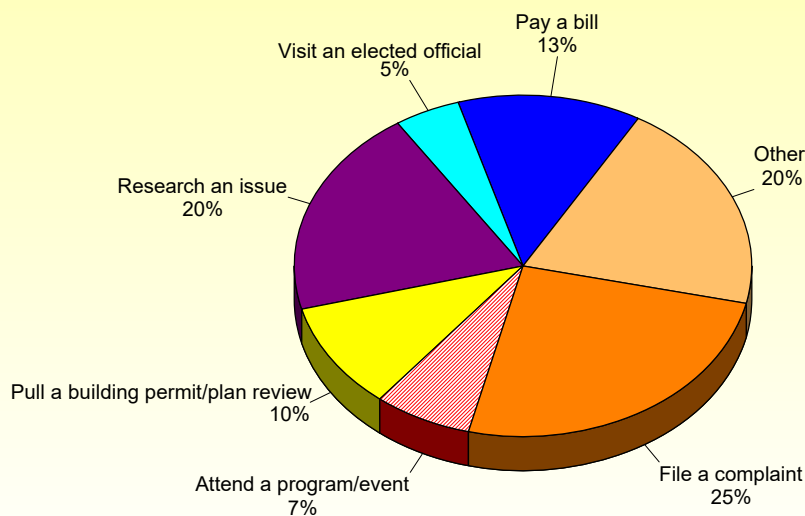
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q25. Methods of Contacting the City That Residents Would Likely Use First

by percentage of respondents (excluding "don't know")

Phone
63%

Other
2%

Visit City Hall/dept. office
7%

Social media
2%

Attend a community meeting
1%

Contact a commissioner
4%

Send email
21%
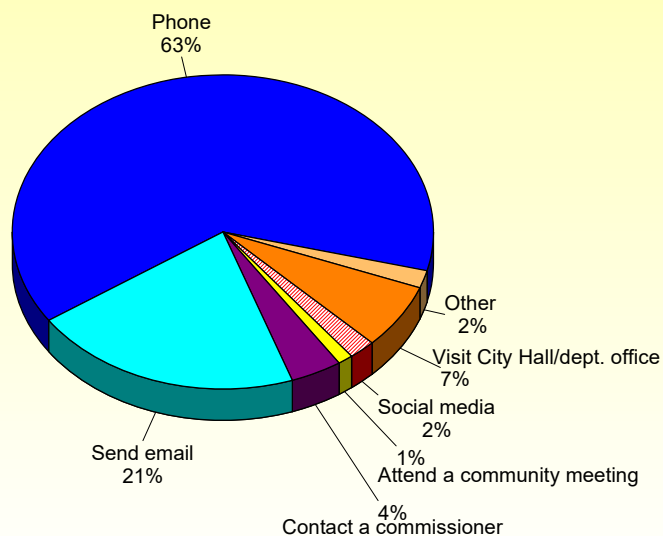
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q26. Agreement With Various Statements About Most Recent Interaction With City Employees

by percentage of respondents (excluding "don't know")

Statement	Strongly Agree (5)	Agree (4)	Neutral (3)	Disagree (2,1)
City employees are courteous & professional	13%	44%	28%	15%
City govt. is open & interested in hearing concerns/issues of residents	11%	38%	29%	22%
City employees possess proper knowledge	8%	36%	37%	19%
City employees have had proper training	9%	33%	39%	19%
It is easy to get a hold of someone at the City	7%	29%	31%	33%
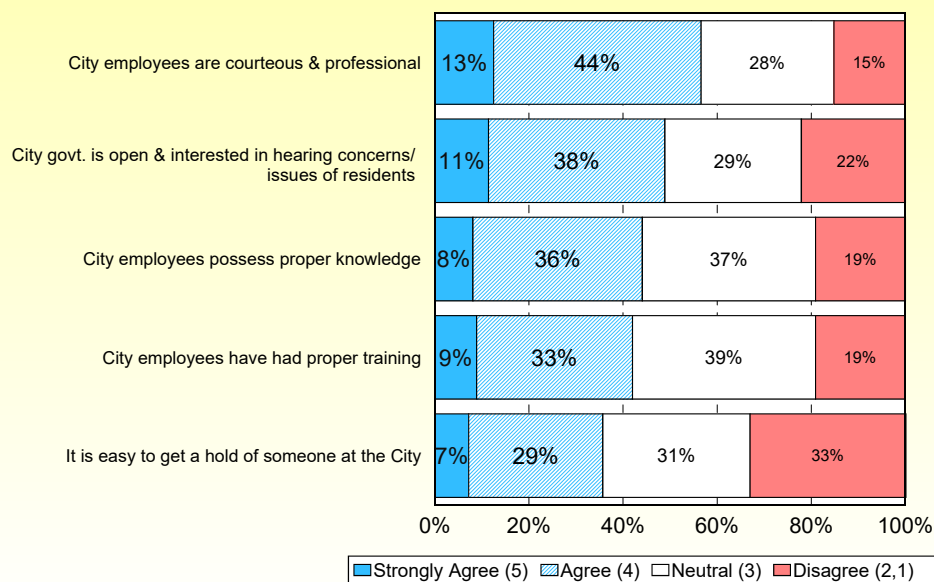
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q27. Satisfaction With the Overall Quality of Leadership Provided by the City's Elected Officials
by percentage of respondents (excluding "don't know")

Satisfied
37%

Very satisfied
9%

Very dissatisfied
7%

Dissatisfied
14%

Neutral
33%
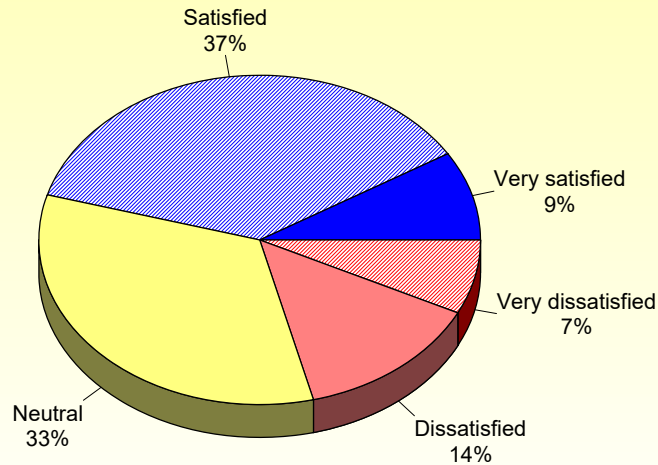
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q28. How the Tourism Industry in Miami Beach Affects Quality of Life
by percentage of respondents (excluding "don't know")

Adds to the quality of life
51%

Neither adds nor detracts
from the quality of life
18%

31%
Detracts from the quality of life
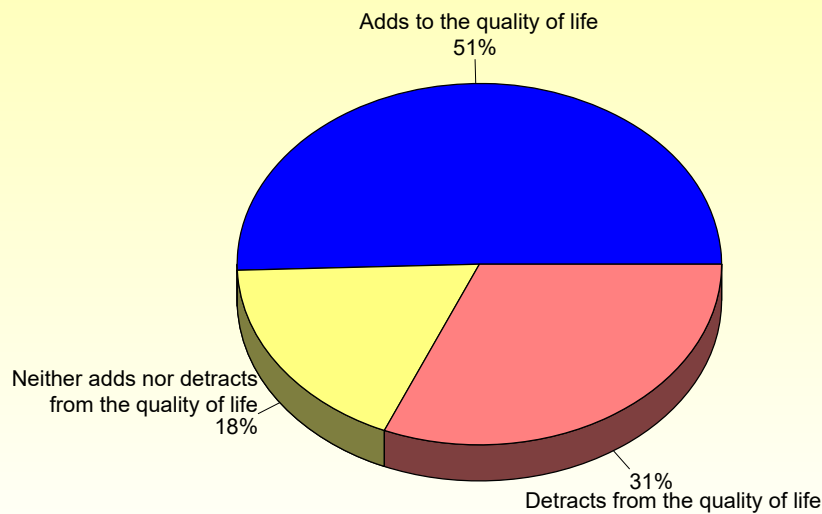
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Q29. Whether Residents Would Recommend the City of Miami Beach to Family and Friends as a Place to Live
by percentage of respondents (excluding "don't know")

Definitely recommend
38%

Definitely not recommend
6%

Probably recommend
36%

Probably not recommend
21%
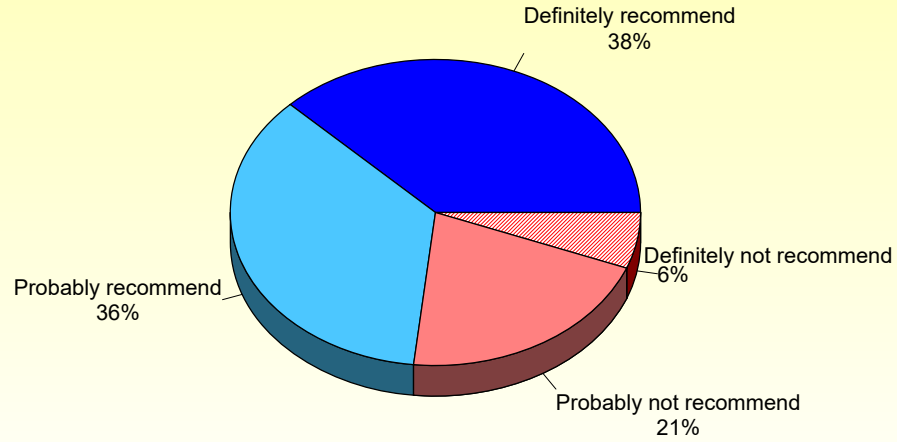
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

DEMOGRAPHICS

QD1. Are you of Hispanic origin?
by percentage of respondents

Yes
46%

No
54%
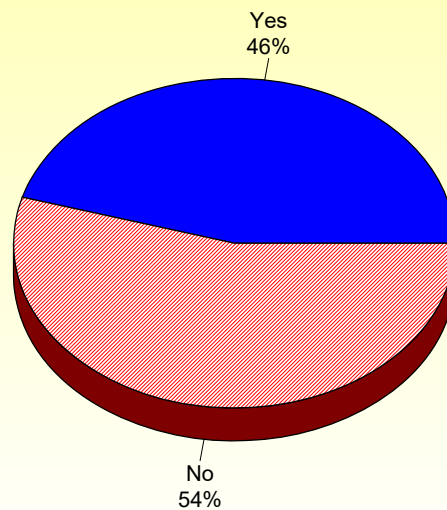
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

QD2. In which country were you born?

by percentage of respondents (excluding "not provided")

United States
52%

Cuba
14%

Other country
34%
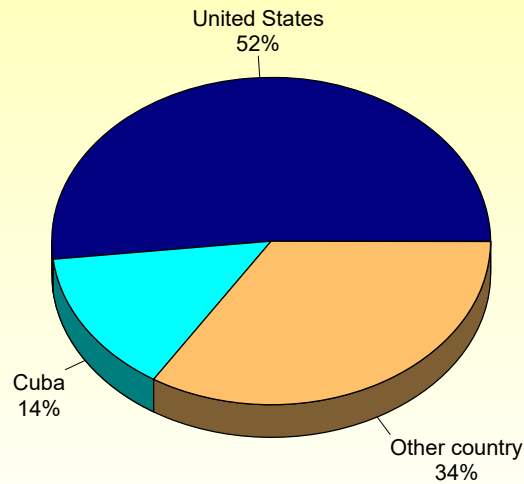
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

QD3. Which of the following best describes your race?

by percentage of respondents (multiple selections could be made)

White	90%
African American/Black	3%
Asian, Hawaiian/Other Pacific Islander	2%
American Indian or Alaska Native	0.4%
Other	6%
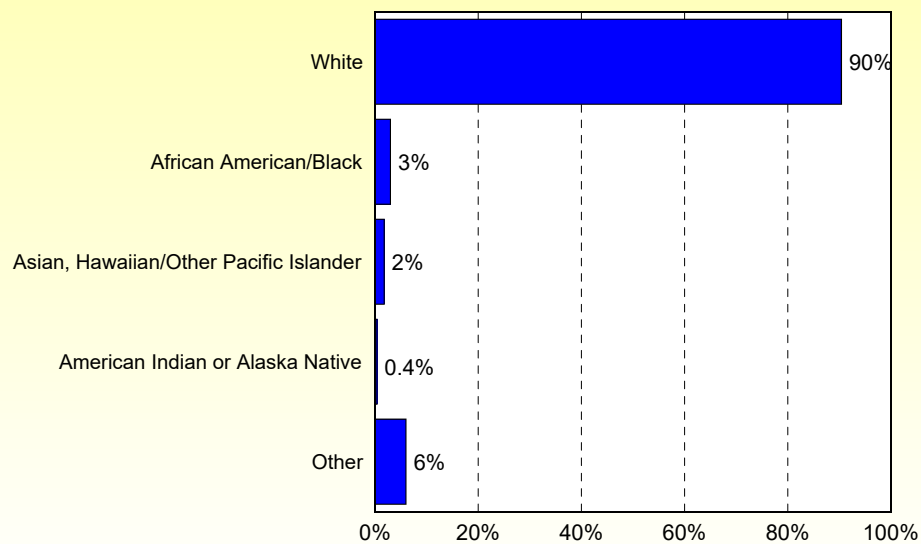
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

QD4. In what type of residence do you live?
by percentage of respondents (excluding "not provided")

Single family home
25%

Townhome or condo
62%

Multi-family complex
13%
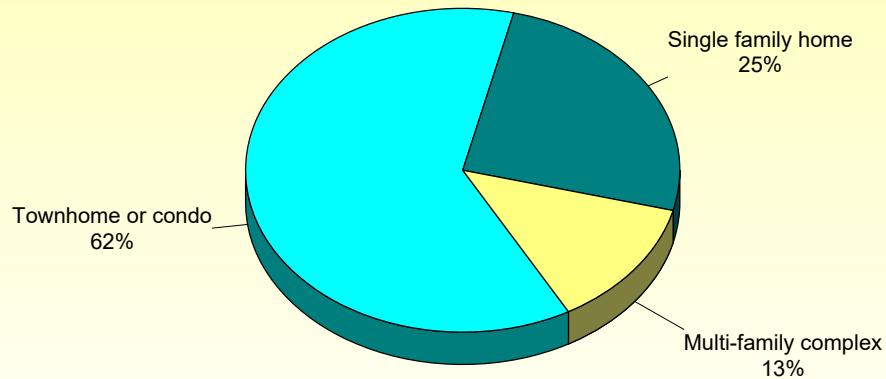
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)
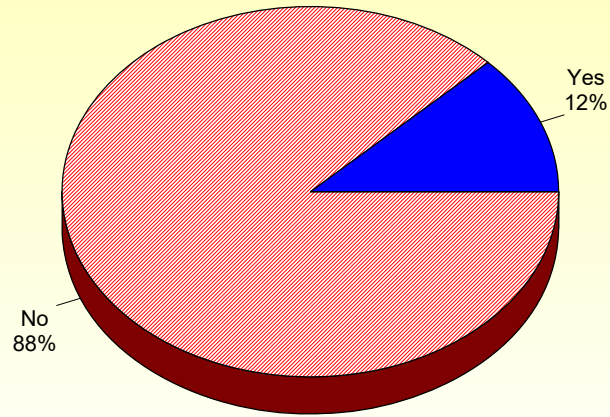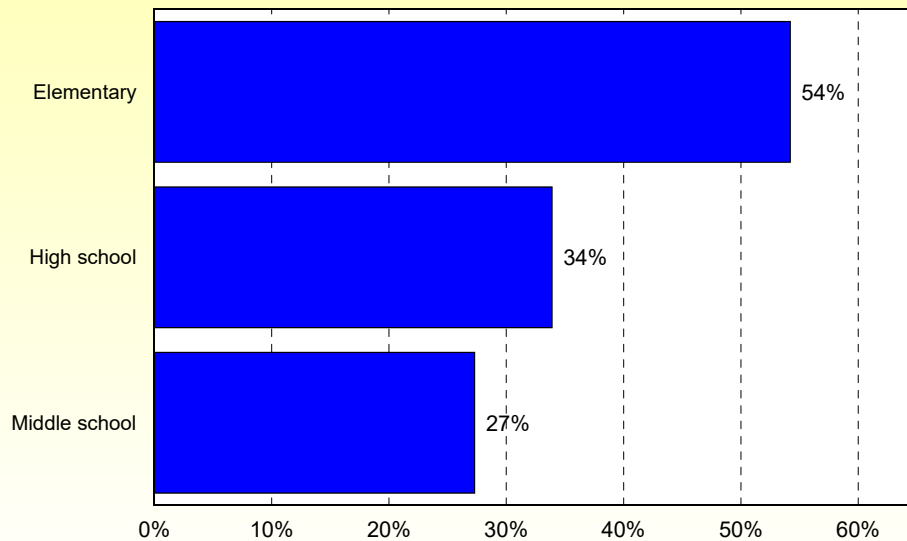
QD5. Do you own or rent your current residence?
by percentage of respondents (excluding "not provided")

Own
71%

Rent
29%
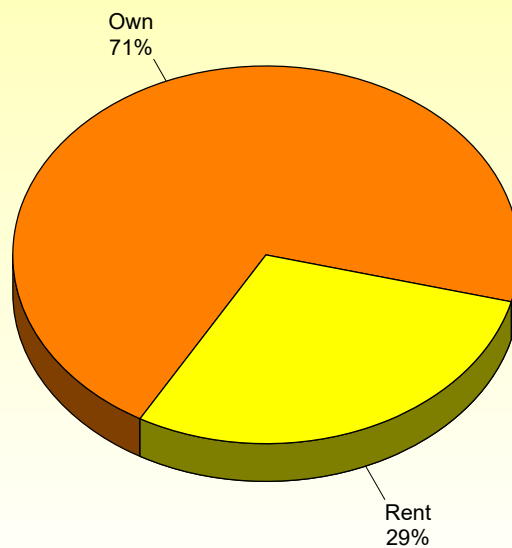
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

QD6. Approximately how many years have you lived in the City of Miami Beach?
by percentage of respondents (excluding "not provided")

6 to 10
16%

5 or less
20%

11 to 15
15%

31+
14%

16 to 20
18%

21 to 30
16%
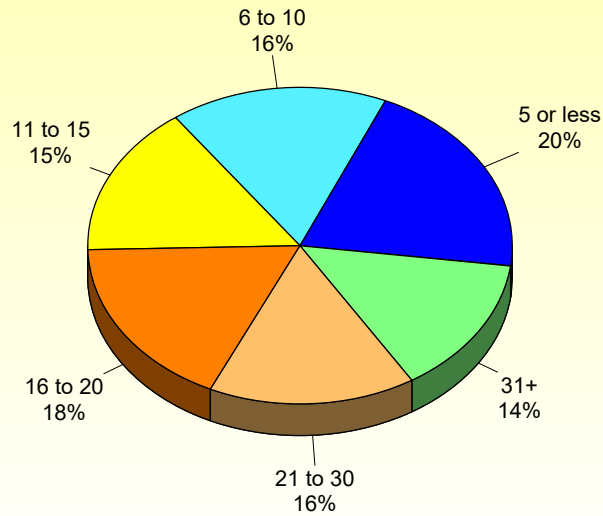
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

QD7. What is your age?
by percentage of respondents (excluding "not provided")

35 to 44
20%

18 to 34
22%

45 to 54
19%

65+
19%

55 to 64
20%
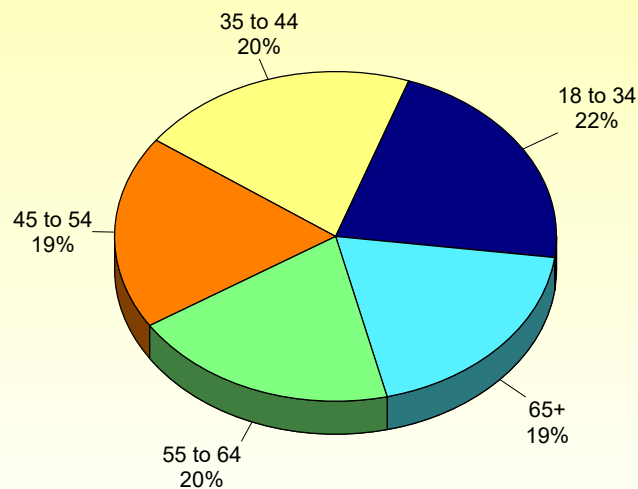
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

QD8. What is the combined annual income of all members of your household from all sources before taxes?
by percentage of respondents

$35K to $74,999
23%

$75K to $99,999
14%

Under $35K
13%

$100K to $149,999
17%

$150K+
33%
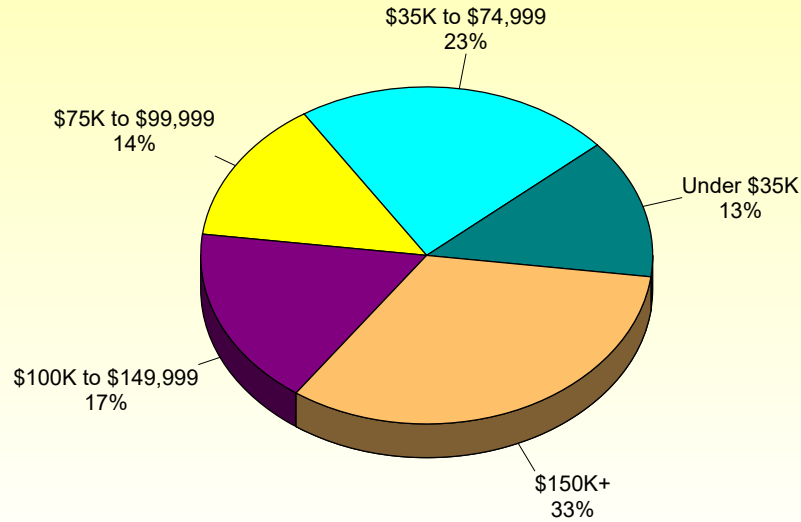
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

QD9. What is the primary language spoken in your home?
by percentage of respondents (excluding "not provided")

English
75%

Other
4%

Spanish
21%
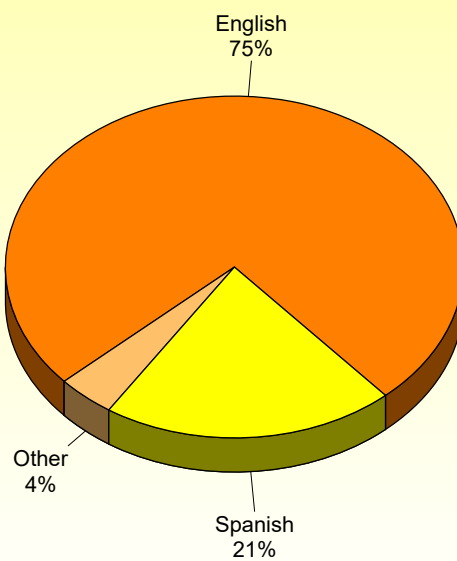
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

QD10. Do you have children in public school (grades K-12)?
by percentage of respondents (excluding "not provided")

Yes
12%

No
88%

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

QD10a. What level of public school does your child/children attend?
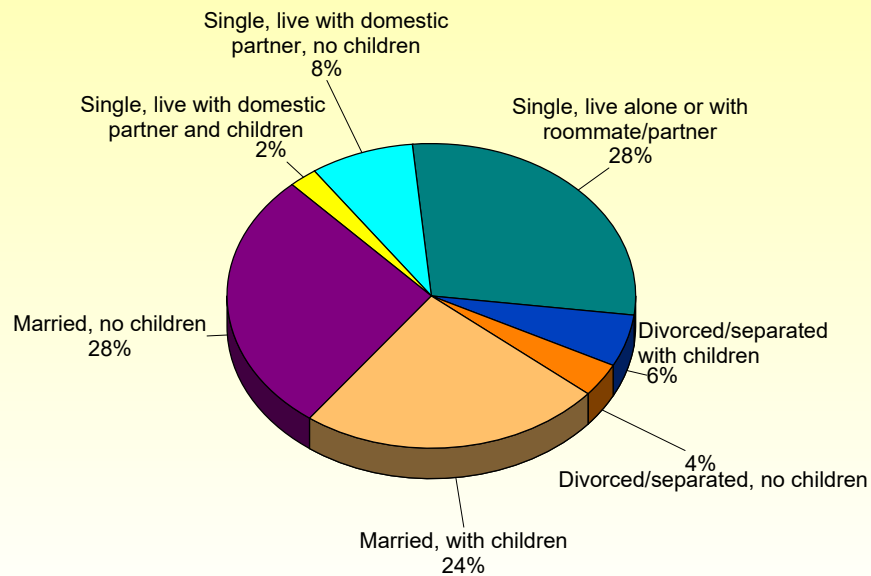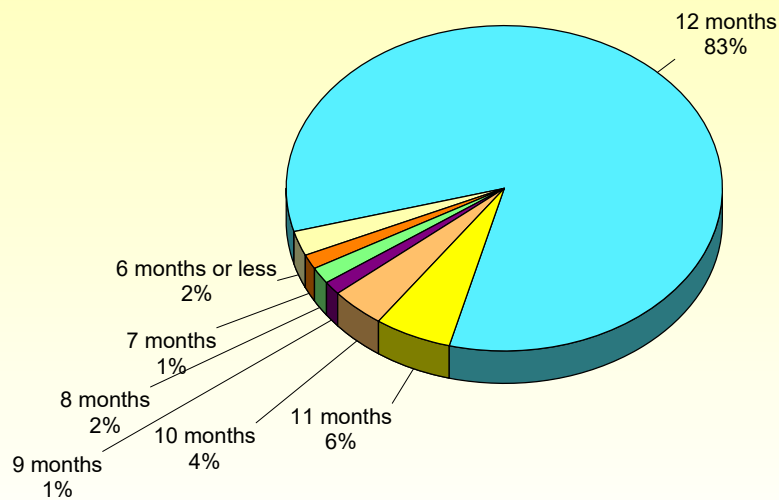by percentage of respondents who have children in public school (multiple selections could be made)

Level	Percentage
Elementary	54%
High school	34%
Middle school	27%

0%   10%   20%   30%   40%   50%   60%

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

QD11. Which best describes your household?
by percentage of respondents (excluding "not provided")

Single, live with domestic partner, no children
8%

Single, live with domestic partner and children
2%

Single, live alone or with roommate/partner
28%

Married, no children
28%

Divorced/separated with children
6%

4%
Divorced/separated, no children

Married, with children
24%

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

QD12. On average, how many months per year do you live in Miami Beach?
by percentage of respondents

12 months
83%

6 months or less
2%

7 months
1%

8 months
2%

9 months
1%

10 months
4%

11 months
6%

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

QD13. Gender
by percentage of respondents

Female
49%

Male
51%

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)
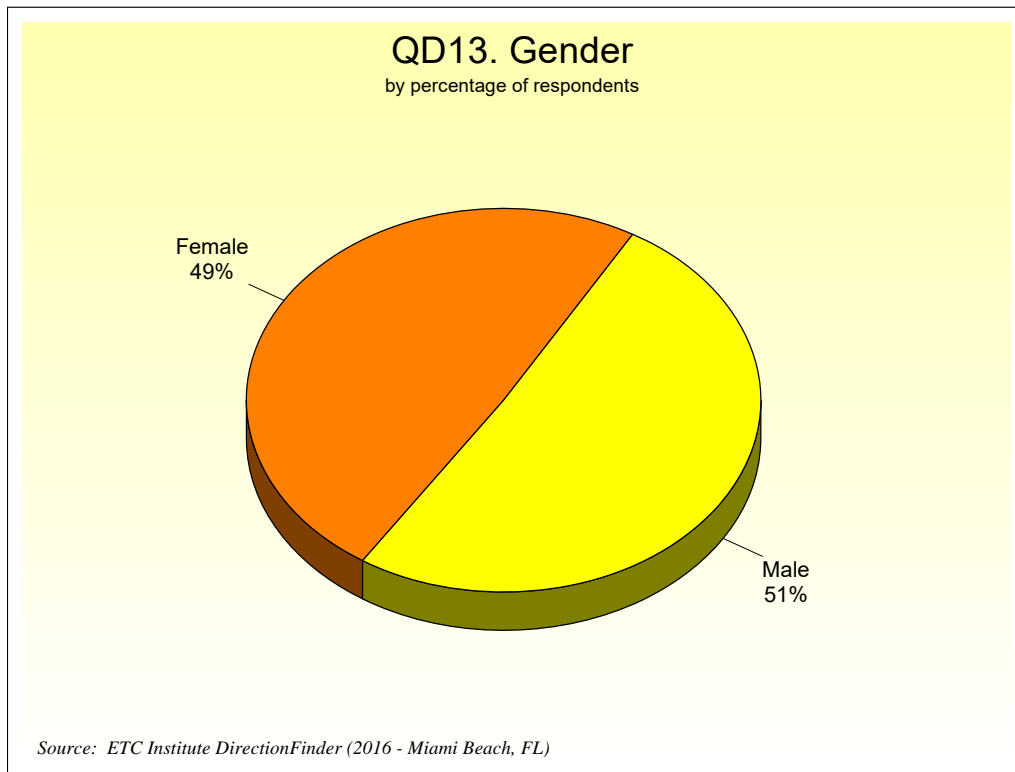
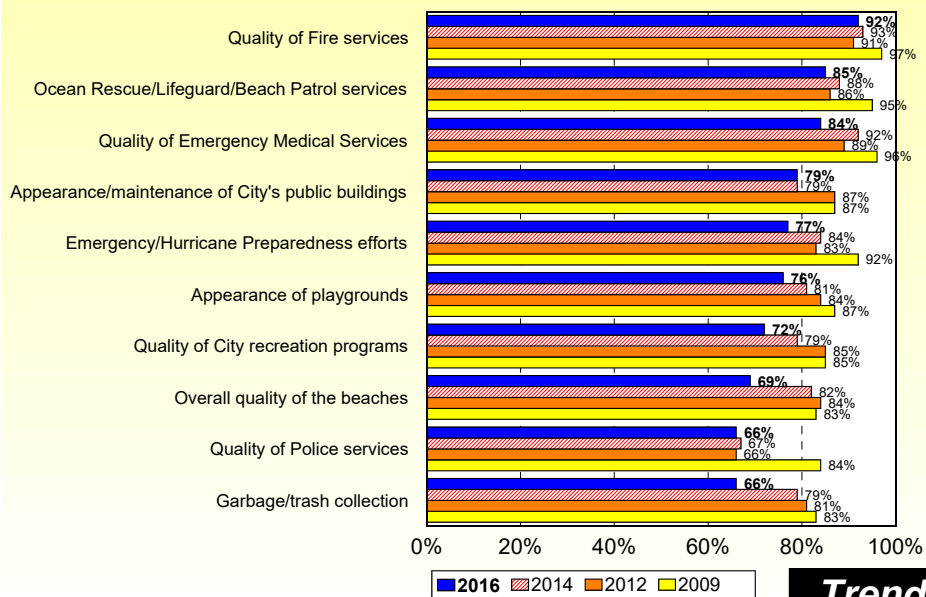# Section 1-2:
Resident Survey
Overall Trends

Overall Ratings for the City of Miami Beach
2009 to 2016
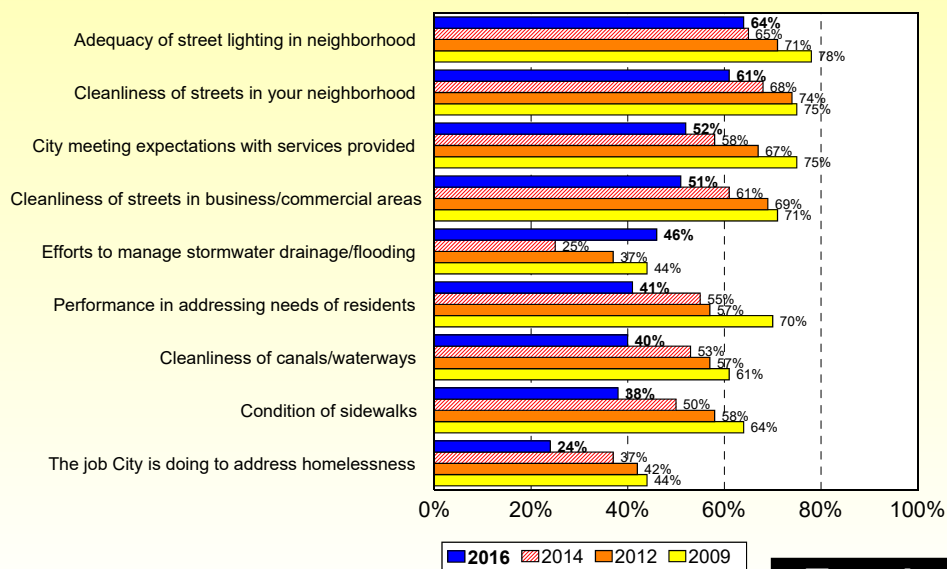by percentage of respondents who rated the item as "excellent" or "good" (excluding "don't know")

	2016	2014	2012	2009
Quality of Fire services	92%	93%	91%	97%
Ocean Rescue/Lifeguard/Beach Patrol services	85%	88%	86%	95%
Quality of Emergency Medical Services	84%	92%	89%	96%
Appearance/maintenance of City's public buildings	79%	79%	87%	87%
Emergency/Hurricane Preparedness efforts	77%	84%	83%	92%
Appearance of playgrounds	76%	81%	84%	87%
Quality of City recreation programs	72%	79%	85%	85%
Overall quality of the beaches	69%	82%	84%	83%
Quality of Police services	66%	67%	66%	84%
Garbage/trash collection	66%	79%	81%	83%

Trends

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Overall Ratings for the City of Miami Beach (cont.)
2009 to 2016
by percentage of respondents who rated the item as "excellent" or "good" (excluding "don't know")

	2016	2014	2012	2009
Adequacy of street lighting in neighborhood	64%	65%	71%	78%
Cleanliness of streets in your neighborhood	61%	68%	74%	75%
City meeting expectations with services provided	52%	58%	67%	75%
Cleanliness of streets in business/commercial areas	51%	61%	69%	71%
Efforts to manage stormwater drainage/flooding	46%	25%	37%	44%
Performance in addressing needs of residents	41%	55%	57%	70%
Cleanliness of canals/waterways	40%	53%	57%	61%
Condition of sidewalks	38%	50%	58%	64%
The job City is doing to address homelessness	24%	37%	42%	44%

Trends

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

How Residents Feel About the Number of the Following Amenities in the City of Miami Beach
2012 to 2016
by percentage of respondents who felt the amount was "about right" (excluding "don't know")

Restaurants
- 68% (2016)
- 71% (2014)
- Not asked in 2012

Cultural activities
- 61% (2016)
- 65% (2014)
- 67% (2012)

Major events
- 61% (2016)
- 64% (2014)
- 71% (2012)

Museums
- 61% (2016)
- 57% (2014)
- 61% (2012)

Bars & nightclubs
- 57% (2016)
- 59% (2014)
- Not asked in 2012

Family friendly activities
- 56% (2016)
- 61% (2014)
- 66% (2012)

**Report only provided "too few" ratings in 2009

Legend: ■ 2016 ▨ 2014 ■ 2012

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)
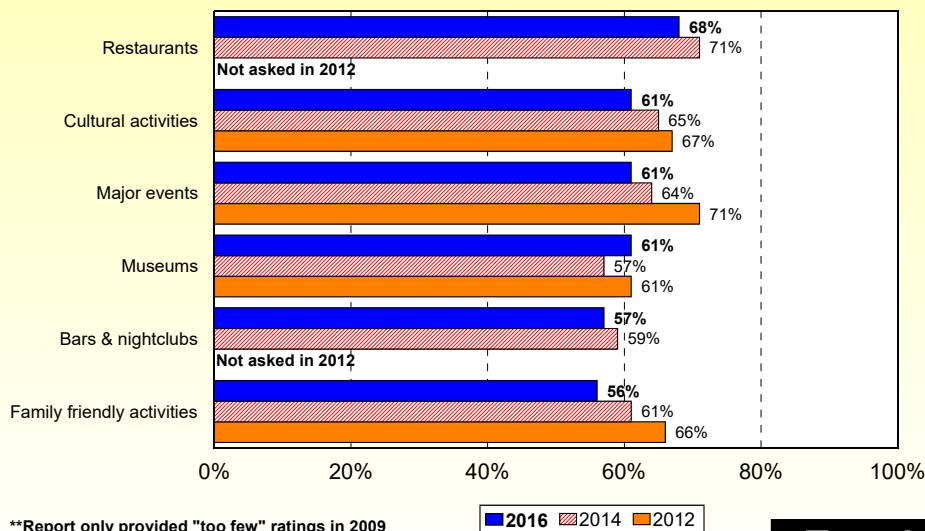
Trends

Feeling of Safety in Miami Beach
2009 to 2016
by percentage of respondents who felt "very safe" or "somewhat safe" (excluding "don't know")
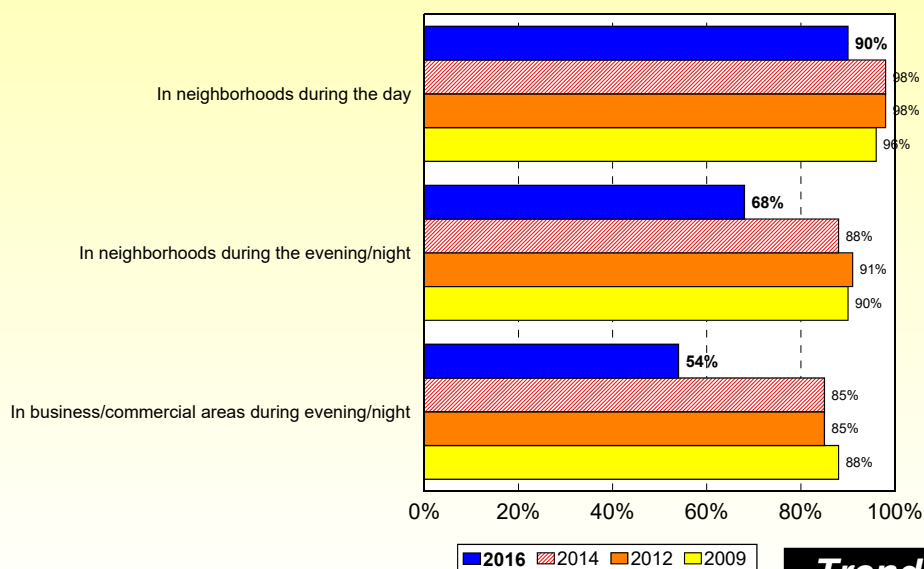
In neighborhoods during the day
- 90% (2016)
- 98% (2014)
- 98% (2012)
- 96% (2009)

In neighborhoods during the evening/night
- 68% (2016)
- 88% (2014)
- 91% (2012)
- 90% (2009)

In business/commercial areas during evening/night
- 54% (2016)
- 85% (2014)
- 85% (2012)
- 88% (2009)

Legend: ■ 2016 ▨ 2014 ■ 2012 ■ 2009

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Trends

Satisfaction With Various <u>Perceptions</u> of the City 2009 to 2016
by percentage of respondents who were "very satisfied" or "satisfied" (<u>excluding "don't know"</u>)
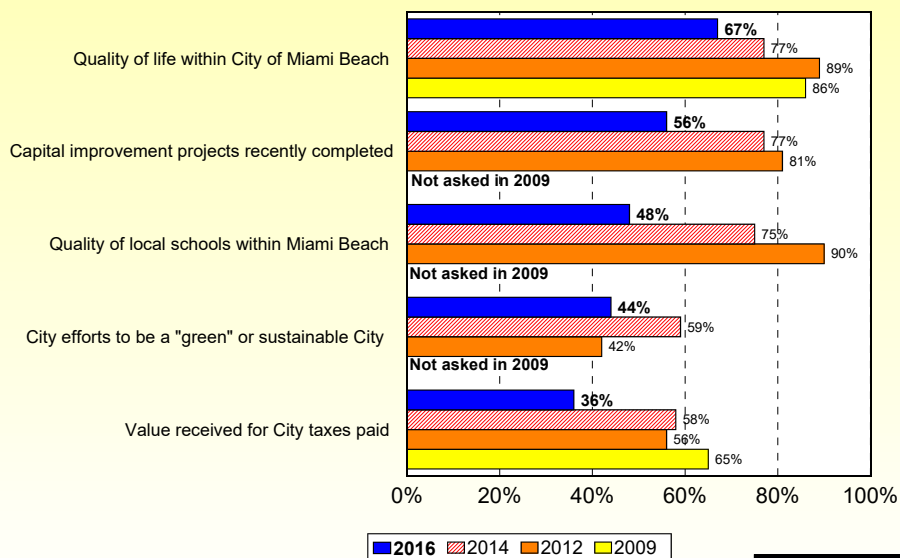
Quality of life within City of Miami Beach
- 67% (2016)
- 77% (2014)
- 89% (2012)
- 86% (2009)

Capital improvement projects recently completed
- 56% (2016)
- 77% (2014)
- 81% (2012)
- Not asked in 2009

Quality of local schools within Miami Beach
- 48% (2016)
- 75% (2014)
- 90% (2012)
- Not asked in 2009

City efforts to be a "green" or sustainable City
- 44% (2016)
- 59% (2014)
- 42% (2012)
- Not asked in 2009

Value received for City taxes paid
- 36% (2016)
- 58% (2014)
- 56% (2012)
- 65% (2009)

0% 20% 40% 60% 80% 100%

Legend: ■ 2016 ▨ 2014 ■ 2012 □ 2009

Trends

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Support for Spending Tax Dollars to Address Rising Sea Levels - 2014 vs. 2016
by percentage of respondents who support the issue (<u>excluding "don't know"</u>)
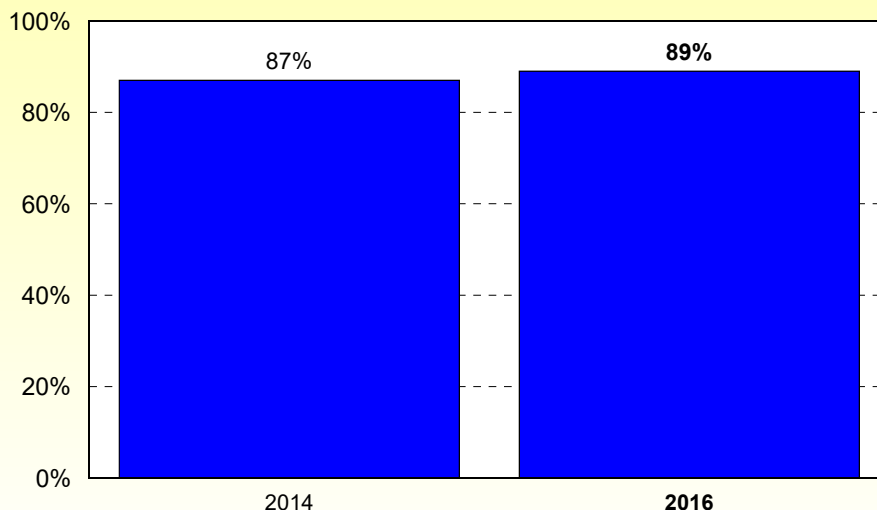
- 2014: 87%
- **2016: 89%**

Trends

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Perceived Level of <u>Code Enforcement and Ordinance</u> in Neighborhoods - 2009 to 2016
by percentage of respondents who rated the level "about right" (<u>excluding "don't know"</u>)
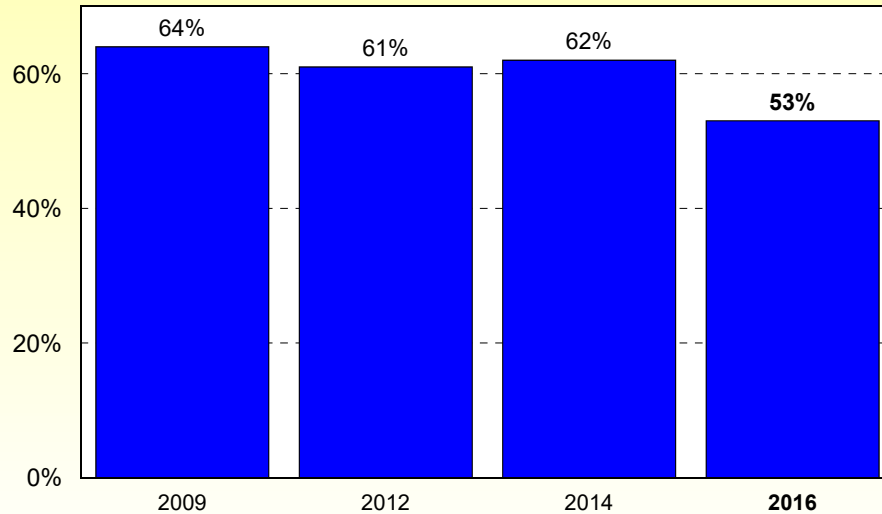
64%
61%
62%
53%

2009   2012   2014   **2016**

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Trends

Perceived Amount of <u>Noise</u> in Neighborhoods 2009 to 2016
by percentage of respondents who rated the amount of noise "acceptable" (<u>excluding "don't know"</u>)

75%
75%
69%
66%

2009   2012   2014   **2016**
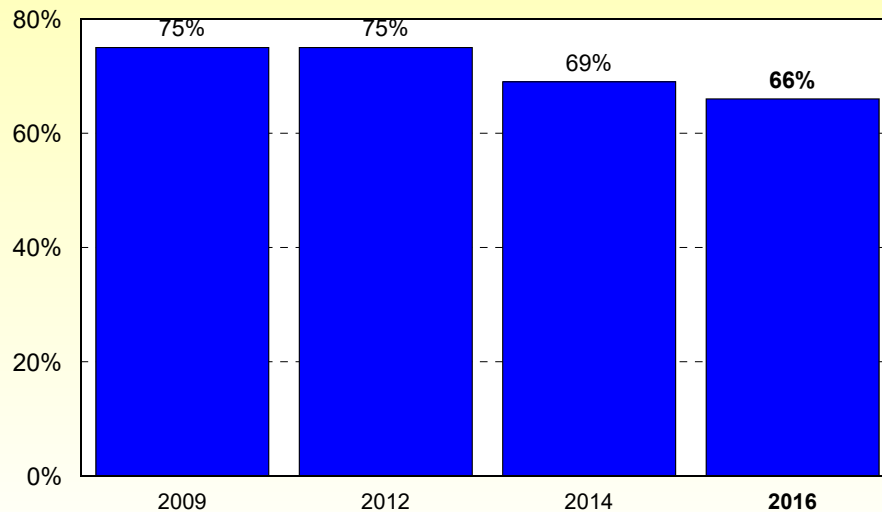
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Trends

What Residents Think About Historic Preservation Efforts in the City of Miami Beach - 2009 to 2016
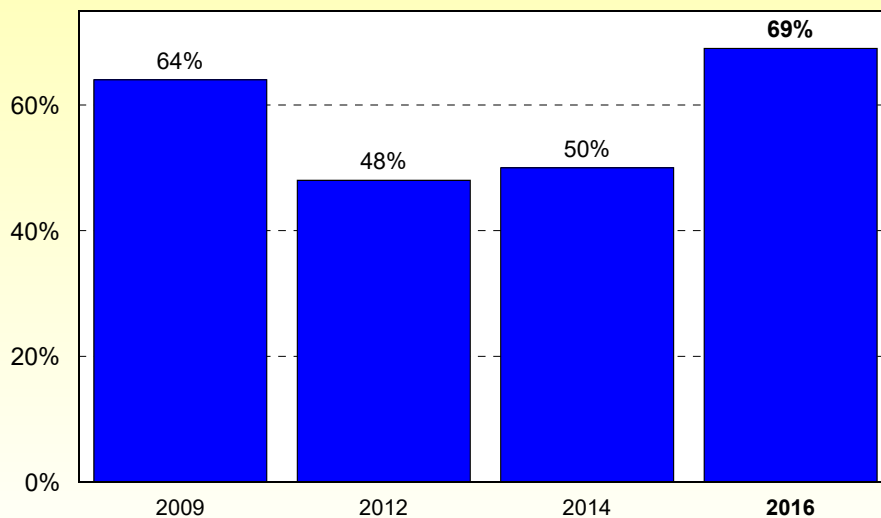by percentage of respondents who rated the efforts "very effective" or "somewhat effective"
(excluding "don't know")
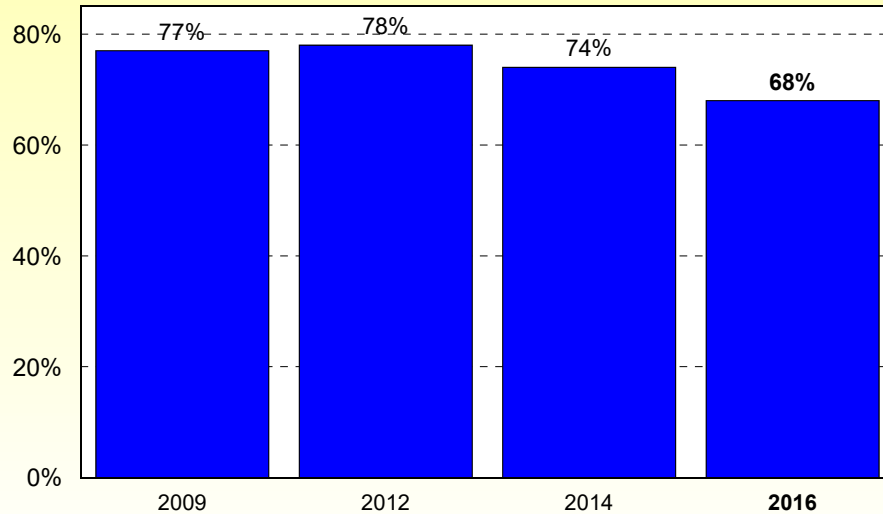
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Trends

Perceived Availability of Parking in the City 2009 to 2016
by percentage of respondents who responded that there is "too little" parking available
(excluding "don't know")
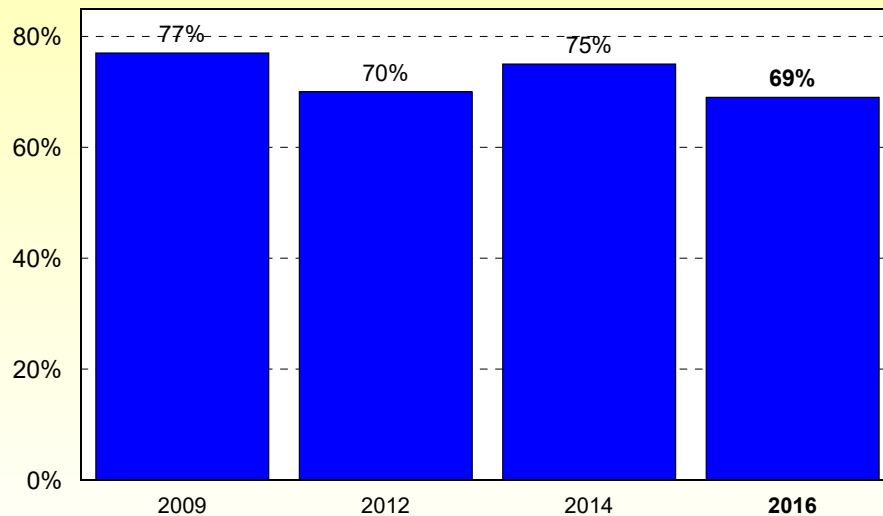
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Trends

Ratings of Traffic Flow in the City - 2009 to 2016
by percentage of respondents who rated traffic flow as "excellent" or "good" (excluding "don't know")
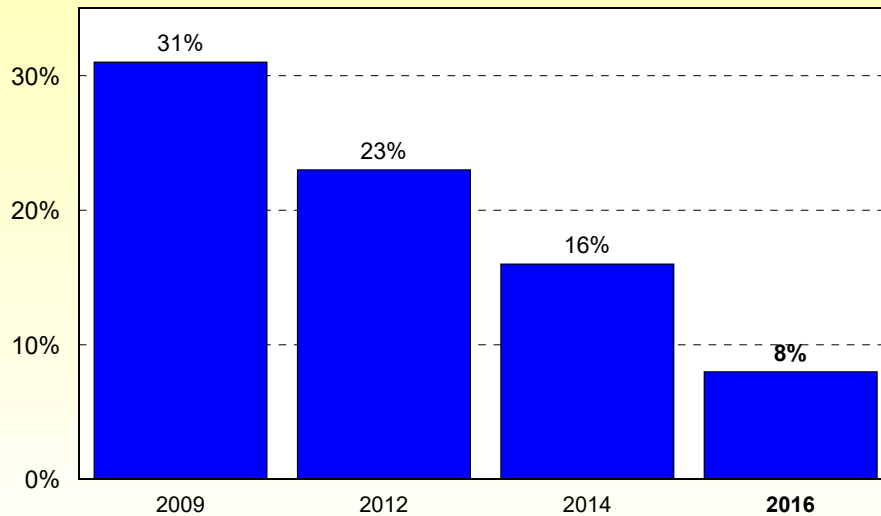
31%

30%

23%

20%

16%

10%

8%

0%

2009   2012   2014   **2016**

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Trends

Perceived Availability of Bicycle Paths/Lanes Throughout the City - 2009 to 2016
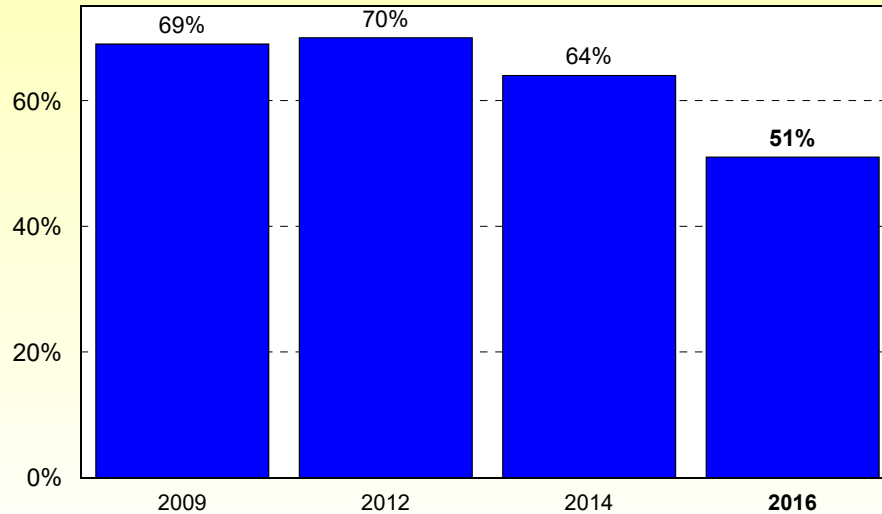by percentage of respondents who rated availability as "too few" (excluding "don't know")

69%

64%

60%

48%   50%

40%

20%

0%

2009   2012   2014   **2016**

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Trends

Usefulness of Information the City of Miami Beach Sends to Residents About City Programs, Activities, Policies and Events - 2014 vs. 2016

by percentage of respondents who felt it was "very useful" or "somewhat useful"

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Trends

Agreement With Various Statements About Most Recent Interaction With City Employees - 2009 to 2016

by percentage of respondents who "strongly agreed" or "agreed" (excluding "don't know")

City employees are courteous & professional
- 57%
- 79%
- 85%
- 86%

City govt. is open & interested in hearing concerns/issues of residents
- 49%
- 63%
- 67%
- 69%

It is easy to get a hold of someone at the City
- 36%
- 61%
- 70%
- 70%

■ 2016 ▨ 2014 ■ 2012 ■ 2009

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Trends

How the Tourism Industry in Miami Beach Affects Quality of Life - 2009 to 2016

by percentage of respondents who felt the tourism industry "adds to the quality of life"

	2009	2012	2014	**2016**
	69%	70%	64%	**51%**

Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Trends

Whether Residents Would Recommend the City of Miami Beach to Family and Friends as a Place to Live 2009 to 2016

by percentage of respondents who would "definitely recommend" or "probably recommend"
(excluding "don't know")

	2009	2012	2014	**2016**
	78%	77%	81%	**74%**
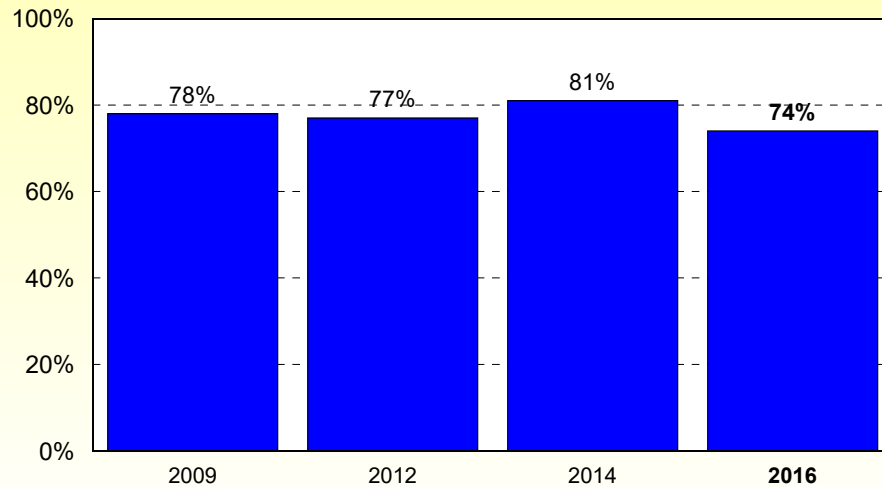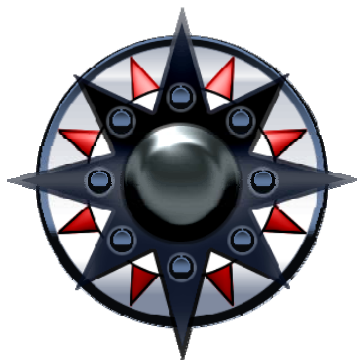
Source: ETC Institute DirectionFinder (2016 - Miami Beach, FL)

Trends

Section 1-3:
Resident Survey Importance-Satisfaction Priorities Analysis

Importance-Satisfaction Analysis
Miami Beach, Florida

Overview

Today, city officials have limited resources which need to be targeted to activities that are of the most benefit to their citizens. Two of the most important criteria for decision making are (1) to target resources toward services of the highest importance to citizens; and (2) to target resources toward those services where citizens are the least satisfied.

The Importance-Satisfaction (IS) rating is a unique tool that allows public officials to better understand both of these highly important decision making criteria for each of the services they are providing. The Importance-Satisfaction rating is based on the concept that cities will maximize overall citizen satisfaction by emphasizing improvements in those service categories where the level of satisfaction is relatively low and the perceived importance of the service is relatively high.

Methodology

The rating is calculated by summing the percentage of responses for items selected as the first, second, and third most important services for the City to emphasize over the next two years. This sum is then multiplied by 1 minus the percentage of respondents that indicated they were positively satisfied with the City's performance in the related area (the sum of the ratings of 3 and 4 on a 4-point scale excluding "don't know" responses). "Don't know" responses are excluded from the calculation to ensure that the satisfaction ratings among service categories are comparable. [IS=Importance x (1-Satisfaction)].

Example of the Calculation. Respondents were asked to identify the major City services they thought were the most important for the City to provide. Approximately thirty-three percent (32.7%) selected "quality of Police services" as one of the most important major City services for the City to provide.

With regard to satisfaction, 66% of the residents surveyed rated their overall satisfaction with "quality of Police services" as a "3" or a "4" on a 4-point scale (where "4" means "excellent"). The I-S rating for "quality of Police services" was calculated by multiplying the sum of the most important percentages by 1 minus the sum of the satisfaction percentages. In this example, 32.7% was multiplied by 34% (1-0.66). This calculation yielded an I-S rating of 0.1112, which ranked sixth out of thirty-two major City services.

The maximum rating is 1.00 and would be achieved when 100% of the respondents select an item as one of their top three choices to emphasize over the next two years and 0% indicate that they are positively satisfied with the delivery of the service.

The lowest rating is 0.00 and could be achieved under either one of the following two situations:

- if 100% of the respondents were positively satisfied with the delivery of the service

- if none (0%) of the respondents selected the service as one of the three most important areas for the City to emphasize over the next two years.

Interpreting the Ratings

Ratings that are greater than or equal to 0.20 identify areas that should receive significantly more emphasis over the next two years. Ratings from .10 to .20 identify service areas that should receive increased emphasis. Ratings less than .10 should continue to receive the current level of emphasis.

- Definitely Increase Emphasis (IS>=0.20)

- Increase Current Emphasis (0.10<=IS<0.20)

- Maintain Current Emphasis (IS<0.10)

The result for the City of Miami Beach is provided on the following page.

Importance-Satisfaction Analysis

Importance-Satisfaction Rating
City of Miami Beach Resident Survey
__OVERALL__

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS .10-.20)						
The job City is doing to address homelessness	24%	5	24%	31	0.1832	**1**
Cleanliness of streets in your neighborhood	39%	1	61%	19	0.1517	**2**
Efforts to manage stormwater drainage/flooding	28%	3	46%	26	0.1496	**3**
Cleanliness of canals/waterways	20%	6	40%	28	0.1188	**4**
Performance in addressing needs of residents	20%	7	41%	27	0.1156	**5**
Quality of Police services	33%	2	66%	14	0.1112	**6**
Medium Priority (IS <.10)						
Condition of sidewalks	15%	11	38%	29	0.0955	**7**
Cleanliness of streets in business/commercial areas	18%	10	51%	24	0.0858	**8**
Overall quality of the beaches	27%	4	69%	12	0.0837	**9**
Availability of Police in your neighborhood	18%	8	69%	11	0.0558	**10**
Clean-up of litter/debris on private property	11%	15	47%	25	0.0557	**11**
Cleanliness/maintenance of public beach restrooms	7%	19	24%	32	0.0494	**12**
Garbage/trash collection	14%	12	66%	15	0.0476	**13**
Cleanliness and maintenance of public restrooms	6%	20	27%	30	0.0445	**14**
Adequacy of street lighting in neighborhood	12%	13	64%	17	0.0443	**15**
Quality of customer service provided by the City	8%	16	54%	22	0.0386	**16**
Maintenance of rights of way along City streets	7%	17	57%	21	0.0297	**17**
Quality of Emergency Medical Services	18%	9	84%	3	0.0283	**18**
City meeting expectations with services provided	5%	23	52%	23	0.0226	**19**
How easy it is to get info about City services	4%	24	58%	20	0.0160	**20**
Emergency/Hurricane Preparedness efforts	7%	18	77%	5	0.0152	**21**
Quality of City recreation programs	5%	22	72%	9	0.0137	**22**
Variety of City recreation programs	3%	25	64%	16	0.0119	**23**
Quality of Fire services	12%	14	92%	1	0.0097	**24**
Cleanliness/maintenance of public garages	3%	27	63%	18	0.0093	**25**
Quality of City recreational facilities	3%	26	70%	10	0.0090	**26**
Ocean Rescue/Lifeguard/Beach Patrol services	5%	21	85%	2	0.0077	**27**
Amount of City recreation programs	2%	29	66%	13	0.0068	**28**
Appearance of playgrounds	2%	28	76%	7	0.0058	**29**
Appearance/maintenance of City's public buildings	2%	30	79%	4	0.0036	**30**
Condition of City athletic fields	1%	31	77%	6	0.0023	**31**
Appearance of City pools	1%	32	74%	8	0.0021	**32**

Note: The I-S Rating is calculated by multiplying the "Most Important" % by (1-'Satisfaction' %)

Most Important %:   The "Most Important" percentage represents the sum of the first, second, third,
fourth and fifth most important responses for each item. Respondents were asked
to identify the items they thought were most important for the City to provide.

Satisfaction %:   The rating percentage represents the sum of the ratings "3" and "4" excluding 'don't knows.'
Respondents ranked their level of satisfaction with the each of the items on a scale
of 1 to 4 with "4" being "excellent" and "1" being "poor."

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Importance-Satisfaction Matrix Analysis

The Importance-Satisfaction rating is based on the concept that public agencies will maximize overall customer satisfaction by emphasizing improvements in those areas where the level of satisfaction is relatively low and the perceived importance of the service is relatively high. ETC Institute developed an Importance-Satisfaction Matrix to display the perceived importance of major services that were assessed on the survey against the perceived quality of service delivery. The two axes on the matrix represent Satisfaction (vertical) and relative Importance (horizontal).

The I-S (Importance-Satisfaction) matrix should be interpreted as follows.

- **Continued Emphasis (above average importance and above average satisfaction).** This area shows where the City is meeting customer expectations. Items in this area have a significant impact on the customer's overall level of satisfaction. The City should maintain (or slightly increase) emphasis on items in this area.

- **Exceeding Expectations (below average importance and above average satisfaction).**   This area shows where the City is performing significantly better than customers expect the City to perform. Items in this area do not significantly affect the overall level of satisfaction that residents have with City services. The City should maintain (or slightly decrease) emphasis on items in this area.

- **Opportunities for Improvement (above average importance and below average satisfaction).**   This area shows where the City is not performing as well as residents expect the City to perform. This area has a significant impact on customer satisfaction, and the City should DEFINITELY increase emphasis on items in this area.

- **Less Important (below average importance and below average satisfaction).** This area shows where the City is not performing well relative to the City's performance in other areas; however, this area is generally considered to be less important to residents. This area does not significantly affect overall satisfaction with City services because the items are less important to residents. The agency should maintain current levels of emphasis on items in this area.
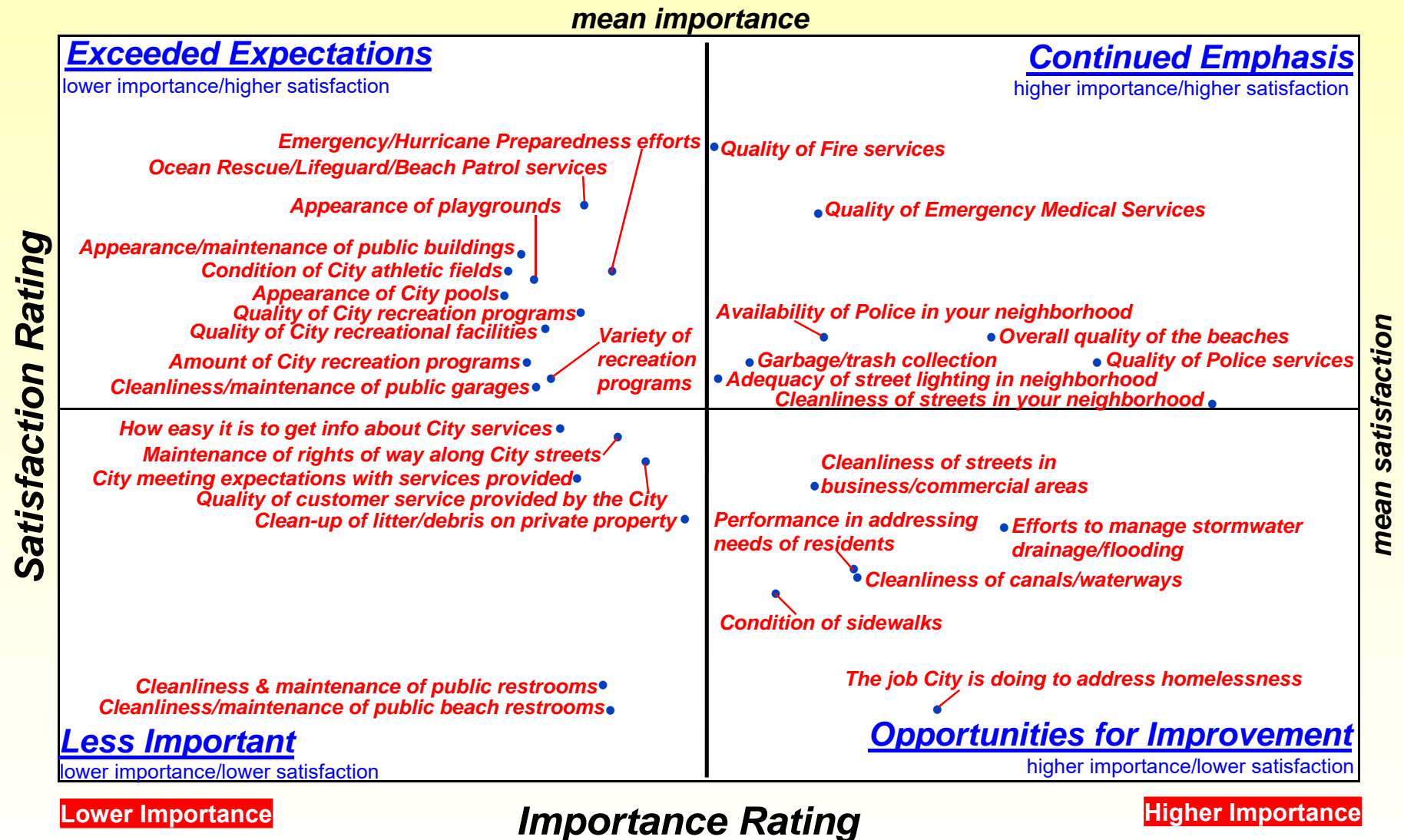
A matrix showing the results for the City of Miami Beach is provided on the following page.

City of Miami Beach 2016 Resident Survey
Importance-Satisfaction Assessment Matrix
-Overall City Services-

(points on the graph show deviations from the mean importance and satisfaction ratings given by respondents to the survey)

mean importance

Satisfaction Rating

Exceeded Expectations
lower importance/higher satisfaction

Continued Emphasis
higher importance/higher satisfaction

Emergency/Hurricane Preparedness efforts
Ocean Rescue/Lifeguard/Beach Patrol services
Appearance of playgrounds
Appearance/maintenance of public buildings
Condition of City athletic fields
Appearance of City pools
Quality of City recreation programs
Quality of City recreational facilities
Amount of City recreation programs
Cleanliness/maintenance of public garages

Variety of recreation programs

Quality of Fire services

Quality of Emergency Medical Services

Availability of Police in your neighborhood
Overall quality of the beaches
Garbage/trash collection   Quality of Police services
Adequacy of street lighting in neighborhood
Cleanliness of streets in your neighborhood

How easy it is to get info about City services
Maintenance of rights of way along City streets
City meeting expectations with services provided
Quality of customer service provided by the City
Clean-up of litter/debris on private property

Cleanliness of streets in business/commercial areas

Performance in addressing needs of residents   Efforts to manage stormwater drainage/flooding

Cleanliness of canals/waterways

Condition of sidewalks

Cleanliness & maintenance of public restrooms
Cleanliness/maintenance of public beach restrooms

The job City is doing to address homelessness

Less Important
lower importance/lower satisfaction

Opportunities for Improvement
higher importance/lower satisfaction

mean satisfaction

Lower Importance

Importance Rating

Higher Importance

Source: ETC Institute (2016)

ETC Institute (2016)

Section 1-4:
Resident Survey Benchmarking Comparisons to Other Communities

DirectionFinder® Survey
Year 2016 Benchmarking Summary Report

Overview

ETC Institute's DirectionFinder® program was originally developed in 1999 to help community leaders across the United States use statistically valid community survey data as a tool for making better decisions.   Since November 1999, the survey has been administered in more than 300 cities and counties in 43 states. Most participating communities conduct the survey on an annual or biennial basis.

This report contains benchmarking data from two sources. The first source is from a national survey that was administered by ETC Institute during the Summer of 2015 that is part of a random sample of more than 3,500 residents in the continental United States. The second source is from a regional survey administered to a random sample of 350 residents in Florida during the Summer of 2015.

The "U.S. Average" shown in the charts reflects the overall results of ETC Institute's national survey of more than 3,500 residents; the "Florida Average" shown in the charts reflects the results of the regional survey of 350 residents in Florida.

National Benchmarks

Note: The benchmarking data contained in this report is protected intellectual property. Any reproduction of the benchmarking information in this report by persons or organizations not directly affiliated with the City of Miami Beach, Florida is not authorized without written consent from ETC Institute.

Overall Satisfaction with Major Categories of City Services
Miami Beach vs. Florida vs. the U.S.

by percentage of respondents who rated the item 3 or 4 on a 4-point scale
where 4 was "excellent" and 1 was "poor" (excluding don't knows)

ETC Institute (2016)

	Miami Beach	Florida	U.S.
Fire services	92%	88%	87%
Emergency medical services (EMS)	84%	85%	85%
City recreation programs	72%	71%	69%
Police services	66%	76%	72%
Customer service provided by City employees	54%	59%	55%
Stormwater drainage	46%	57%	45%
Codes and ordinances	47%	47%	45%
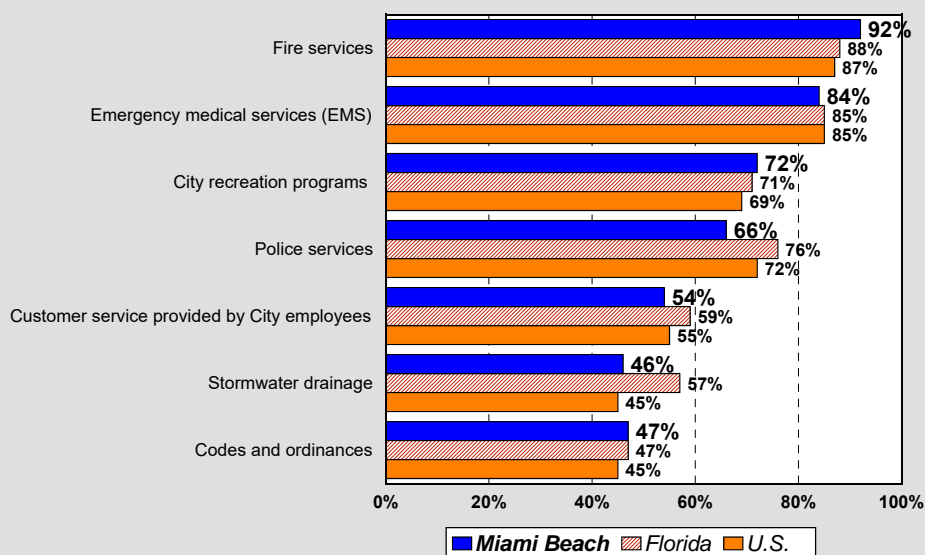
Satisfaction With Items That Influence the Perception Residents Have of the City
Miami Beach vs. Florida vs. the U.S.
by percentage of respondents who rated the item 4 or 5 on a 5-point scale
where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)

As a place to live
- Miami Beach: 70%
- Florida: 85%
- U.S.: 81%

Quality of life
- Miami Beach: 67%
- Florida: 77%
- U.S.: 75%

How well the City is planning for the future
- Miami Beach: 37%
- Florida: 36%
- U.S.: 40%

Value for City taxes and fees
- Miami Beach: 36%
- Florida: 45%
- U.S.: 41%

Miami Beach _Florida_ U.S.

ETC Institute (2016)
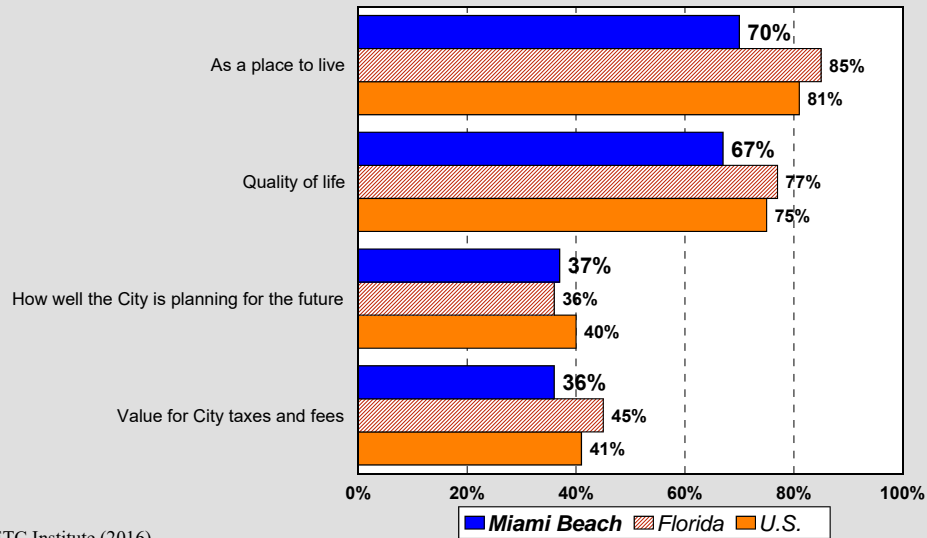
Overall Satisfaction with Communication
Miami Beach vs. Florida vs. the U.S.
by percentage of respondents who rated the item 4 or 5 on a 5-point scale
where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding don't knows)

City's website
- Miami Beach: 58%
- Florida: 65%
- U.S.: 57%

Miami Beach _Florida_ U.S.

ETC Institute (2016)
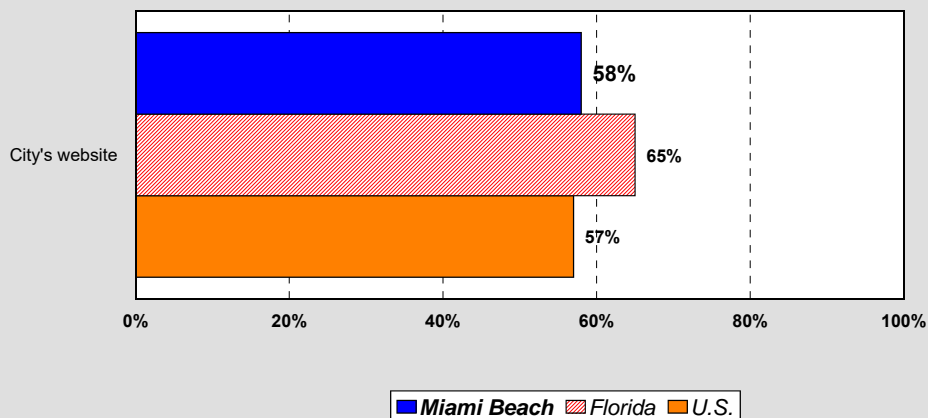
Section 1-5:
Resident Survey Instrument

MIAMIBEACH

City of Miami Beach, 1700 Convention Center Drive, Miami Beach, Florida 33139, www.miamibeachfl.gov

Jimmy L. Morales, City Manager
Tel: 305-673-7010 , Fax: 305-673-7782

May 23, 2016

Dear Residents:

The City of Miami Beach is committed to providing excellent public service and safety to all who live, work, and play in our vibrant, tropical, historic community.

A significant driver in developing citywide priorities is the community input received through the Community Satisfaction Surveys with residents and business owners. These surveys provide an understanding of current satisfaction levels within City of Miami Beach government and the services it delivers; provides benchmarks to similar jurisdictions; and offers recommendations for improving satisfaction and quality of life.

Please take a few moments to complete the 2016 survey. Your participation is vital to the success of this effort, and your responses will remain anonymous. A postage-paid return envelope has been provided for your convenience, or you may complete the survey online at www.miamibeachsurvey.org

Your input will help reveal where we are exceeding expectations, as well as identify areas where improvements are needed to ensure our City moves strategically and innovatively into the future. Since 2005, the City of Miami Beach has conducted five Community Satisfaction Surveys where citizens and businesses have had an opportunity to express their opinions. These survey results are instrumental in driving strategic decisions that affect how City resources are allocated.

We have made significant progress on many of the priorities identified in the last survey administered in 2014. I encourage you to visit our website at http://web.miamibeachfl.gov/excellence to learn more about our Excellence Model and the impact your input has.

As a City, it is our job to provide the public services you need and desire. We need your input in order to improve.

Survey results will be shared with the community once they have been compiled citywide. If you have any questions, please contact ctatham@etcinstitute.com or at 913-254-4512.

We continually strive to deliver outstanding, enhanced services to our residents, businesses and visitors while increasing value for the tax dollars paid. Thank you for your help on this collaborative effort to ensure Miami Beach remains a world-class City.

Sincerely,

Jimmy L. Morales
City Manager

We are committed to providing excellent public service and safety to all who live, work, and play in our vibrant, tropical, historic community.

MIAMIBEACH   City of Miami Beach 2016 Resident Survey

Please have the adult *(age 18 or older)* in your household, who most recently had a birthday, complete this survey. If this person is not able to complete the survey, please have another member of the household complete the survey to ensure the opinions of your household are represented. Your input is an important part of the City's effort to improve City services. When you are finished, please return your completed survey in the postage-paid envelope provided. You may also complete the survey online at *www.miamibeachsurvey.org*.

1. **SATISFACTION WITH CITY SERVICES. City services provided by the City of Miami Beach are listed below. Please rate each service by circling the number that corresponds to your rating.**

	Please rate the following City services:	Excellent	Good	Fair	Poor	Don't Know
01.	Cleanliness of streets in your neighborhood	4	3	2	1	9
02.	Cleanliness of streets in business/commercial areas	4	3	2	1	9
03.	Cleanliness of canals/waterways	4	3	2	1	9
04.	Cleanliness and maintenance of public garages	4	3	2	1	9
05.	Cleanliness and maintenance of public restrooms	4	3	2	1	9
06.	Cleanliness and maintenance of public beach restrooms	4	3	2	1	9
07.	Condition of sidewalks *(few or no cracks)*	4	3	2	1	9
08.	Adequacy of street lighting in your neighborhood *(sufficient, functioning lights)*	4	3	2	1	9
09.	Appearance and maintenance of the City's public buildings	4	3	2	1	9
10.	Overall quality of the beaches *(cleanliness & water quality)*	4	3	2	1	9
11.	Quality of City recreation programs	4	3	2	1	9
12.	Amount of City recreation programs	4	3	2	1	9
13.	Variety of City recreation programs	4	3	2	1	9
14.	Quality of City recreational facilities	4	3	2	1	9
15.	Appearance of playgrounds	4	3	2	1	9
16.	Maintenance of rights of way along City streets/public areas	4	3	2	1	9
17.	Garbage/trash collection	4	3	2	1	9
18.	The job the City is doing to address homelessness	4	3	2	1	9
19.	Appearance of City pools	4	3	2	1	9
20.	Condition of City athletic fields	4	3	2	1	9
21.	How easy it is to get information about City services	4	3	2	1	9
22.	Quality of Police services	4	3	2	1	9
23.	Availability of Police in your neighborhood	4	3	2	1	9
24.	Quality of Emergency Medical Services	4	3	2	1	9
25.	Quality of Fire services	4	3	2	1	9
26.	Quality of Ocean Rescue/Lifeguard/Beach Patrol services	4	3	2	1	9
27.	Quality of City's Emergency/Hurricane Preparedness efforts	4	3	2	1	9
28.	Enforcement of codes & ordinances related to the clean-up of litter and debris on private property	4	3	2	1	9
29.	City's efforts to manage stormwater drainage and flooding	4	3	2	1	9
30.	City's performance in addressing the needs of residents, noise, and disturbances during events that attract large crowds to Miami Beach	4	3	2	1	9
31.	Overall quality of customer service provided by the City	4	3	2	1	9
32.	City meeting your expectations with the services provided	4	3	2	1	9

2. **Which FIVE of the City services listed in Question 1 do you think are most important for the City to provide?** *[Write-in your answers below using the numbers from the list in Question 1.]*

1st: ____   2nd: ____   3rd: ____   4th: ____   5th: ____

3. **CULTURE AND TOURISM USAGE. Please indicate how often you use or visit the following areas or facilities in the City of Miami Beach by circling the corresponding number below:**

How frequently do you visit:	More than once per week	About once per week	2-3 times per month	Once per month	Less than once per month	Never
Places in Miami Beach						
01. Ocean Drive	5	4	3	2	1	9
02. Lincoln Road	5	4	3	2	1	9
03. Washington Avenue	5	4	3	2	1	9
04. 71st Street	5	4	3	2	1	9
05. 41st Street	5	4	3	2	1	9
06. Collins Avenue	5	4	3	2	1	9
07. Ocean Terrace	5	4	3	2	1	9
08. South of 5th Street	5	4	3	2	1	9
09. Sunset Harbor	5	4	3	2	1	9
10. Collins between 72nd - 75th	5	4	3	2	1	9
11. Alton Road between 6th - 17th	5	4	3	2	1	9
Facilities in Miami Beach						
12. The Bass Museum of Art	5	4	3	2	1	9
13. Byron Carlye Theater	5	4	3	2	1	9
14. The Fillmore at the Jackie Gleason Theater	5	4	3	2	1	9
15. The Colony Theater	5	4	3	2	1	9
16. The Miami Beach Convention Center	5	4	3	2	1	9
17. North Shore Band Shell	5	4	3	2	1	9

4. **CULTURE AND TOURISM NEEDS. Please indicate how you feel about the number of the following amenities in the City of Miami Beach by circling the corresponding number below:**

How do you feel about the number of the following in Miami Beach:	Way Too Many	Too Many	About Right	Too Few	Way Too Few	Don't Know
1. Museums	5	4	3	2	1	9
2. Cultural activities *(e.g. art shows, film festivals, musicals, and live performances)*	5	4	3	2	1	9
3. Family friendly activities *(e.g. movies in the park, music in the park, etc.)*	5	4	3	2	1	9
4. Major events *(e.g. boat/home/auto shows, 4th of July celebrations, expositions, food and wine festivals, etc.)*	5	4	3	2	1	9
5. Restaurants	5	4	3	2	1	9
6. Bars and nightclubs	5	4	3	2	1	9

5. **FEELING OF SAFETY. Please rate how safe you feel in the following areas of Miami Beach using a scale of 1 to 5, where 5 means "Very Safe" and 1 means "Very Unsafe."**

How Safe do you feel:	Very Safe	Safe	Somewhat Safe	Unsafe	Very Unsafe	Don't Know
1. In your neighborhood during the day?	5	4	3	2	1	9
2. In your neighborhood during the evening/night?	5	4	3	2	1	9
3. In business/commercial areas of the City during the evening/night?	5	4	3	2	1	9
4. In City parks that currently have Park Rangers during park hours *(Flamingo, N. Shore Open Space, S. Shore Park)*	5	4	3	2	1	9
5. In entertainment areas	5	4	3	2	1	9
6. During special events	5	4	3	2	1	9

6. **Please rate your agreement with the following statements using a scale of 1 to 5, where 5 means "Strongly Agree" and 1 means "Strongly Disagree."**

Please rate your level of agreement with the following statements:	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know
01.	I am satisfied with the amount of tree canopy coverage	5	4	3	2	1	9
02.	I would like to see more trees in my neighborhood	5	4	3	2	1	9
03.	Recycling, yard waste, and other waste diversion programs have reduced the amount of garbage I place in my trash can	5	4	3	2	1	9
04.	I am informed about local climate change issues	5	4	3	2	1	9
05.	I have observed coastal water level increases	5	4	3	2	1	9
06.	I have observed increased flooding	5	4	3	2	1	9
07.	I have observed increased weather temperatures	5	4	3	2	1	9
08.	I have taken steps to make my house more energy efficient	5	4	3	2	1	9
09.	I have taken steps to make my house more water efficient	5	4	3	2	1	9
10.	My household is prepared with food, water, and other supplies for an emergency, such as a natural disaster	5	4	3	2	1	9
11.	I know where to get information during an emergency	5	4	3	2	1	9
12.	It's easy to obtain permits for sustainable construction *(materials, renewable energy, energy & water efficiency)* in my neighborhood	5	4	3	2	1	9

7. **PERCEPTIONS OF THE CITY. Please rate your satisfaction with each of the following using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."**

How Satisfied are you with:	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
01.	Overall image of the City	5	4	3	2	1	9
02.	City efforts to plan for growth	5	4	3	2	1	9
03.	City regulation of residential development	5	4	3	2	1	9
04.	City regulation of commercial development	5	4	3	2	1	9
05.	City efforts to prepare for the future	5	4	3	2	1	9
06.	City efforts to prepare for disasters	5	4	3	2	1	9
07.	City efforts to prevent crime	5	4	3	2	1	9
08.	Miami Beach trolley	5	4	3	2	1	9
09.	Storm Drainage improvements	5	4	3	2	1	9
10.	Value you receive for the City taxes you pay	5	4	3	2	1	9
11.	Quality of local schools within Miami Beach	5	4	3	2	1	9
12.	Quality of life within the City of Miami Beach	5	4	3	2	1	9
13.	The City of Miami Beach as a place to live	5	4	3	2	1	9
14.	Capital improvement projects that have recently been completed by the City of Miami Beach *(e.g. Sunset Harbor Garage, 10th St. surface parking lot, Washington Ave., and the Center Neighborhoods Rights of Way project)*	5	4	3	2	1	9
15.	City efforts to be a "green" or sustainable city	5	4	3	2	1	9
16.	Availability of green space near your home	5	4	3	2	1	9
17.	Availability of recycling in public places	5	4	3	2	1	9
18.	Professionalism of City employees who respond to emergencies	5	4	3	2	1	9

7-2. **If you are dissatisfied with LOCAL SCHOOLS *(Question 7, #11)*, why are you dissatisfied?**

_____

7-3. **If you are dissatisfied with MIAMI BEACH TROLLEY *(Question 7, #8)*, please indicate which factors you are dissatisfied with.** *(Check all that apply.)*

____(1) Stop Amenities *(bus bench, shelter, signage, trash receptacle, etc.)* ____(4) Maintenance
____(2) Reliability ____(5) Customer Service
____(3) Cleanliness ____(6) Other: _____

8. **Of the following capital improvement project types, which THREE would you select as the most important?**

____(1) More walking/biking friendly streets, greenways, and paths ____(5) Bridge improvements
____(2) Park improvements, for example neighborhood parks ____(6) City facility improvements
____(3) Water and sewer system improvements ____(7) Stormwater and drainage improvements
____(4) Roadways pavement improvements ____(8) Waterway dredging

9. **Do you support or oppose the City of Miami Beach spending tax dollars to address rising sea levels?** ____(1) Support ____(2) Oppose ____(9) Don't know

10. **CODE ENFORCEMENT.** **Do you think the level of code enforcement and ordinance established by the City of Miami Beach in your neighborhood is:**

____(1) Too much/too restrictive *[Answer Question 10-2.]* ____(3) Too little/not restrictive enough *[Answer Question 10-2.]*
____(2) About right ____(9) Don't know

10-2. **If you think the level of code enforcement is "Too much" or "Too little", why do you feel that way?**

_____

11. **Do you think the amount of noise in your neighborhood is:**
____(1) Way too much ____(3) Acceptable/not a problem *[Skip to Question 12.]*
____(2) A bit too much ____(9) Don't know *[Skip to Question 12.]*

11-2. **Why do you feel that the amount of noise in your neighborhood is too much?**

_____

12. **Can you think of any locations in Miami Beach that need improvements related to litter clean-up, graffiti removal, better code enforcement, homelessness, or anything else? If so, please write the location and the improvement that is needed for up to three locations in the spaces below.**

Location 1 and Reason: _____
Location 2 and Reason: _____
Location 3 and Reason: _____

13. **Do you think historic preservation efforts in the City of Miami Beach have been:**

____(1) Very effective ____(3) Neither effective nor ineffective ____(5) Very ineffective
____(2) Somewhat effective ____(4) Somewhat ineffective ____(9) Don't know

14. **TRANSPORTATION.** **Which of the following is your PRIMARY mode of transportation in Miami Beach?**
____(1) Car/Automobile ____(3) Biking ____(5) Motorcycle/scooter
____(2) Walking ____(4) Public transportation ____(6) Other: _____

15. **Do you think the availability of parking in the City of Miami Beach is:**

____(1) Too little ____(2) About right ____(3) Too much ____(9) Don't know

16. **How would you rate traffic flow in the City of Miami Beach?**

____(1) Excellent ____(2) Good ____(3) Fair ____(4) Poor ____(9) Don't know

17. **Which of the following types of transportation would you consider using as an alternative to taking a car?** *(Check all that apply.)*

____(1) Local bus circulators   ____(3) Express bus to mainland   ____(5) Light Rail/Modern Street Car   ____(9) Don't know
____(2) Trolley car   ____(4) Bicycles   ____(6) Other: _____

  17-2. **Does anyone in your household regularly ride a bicycle?**   ____(1) Yes   ____(2) No

  17-3. **Rate the level of bicycle safety in the City of Miami Beach:**

    ____(1) Very Safe   ____(2) Safe   ____(3) Unsafe   ____(4) Very Unsafe   ____(9) Don't know

18. **How would you describe the availability of bicycle paths/lanes throughout the City of Miami Beach? Would you say:**

____(1) There are too many   ____(2) The number is about right   ____(3) There are too few   ____(9) Don't know

19. **Please check each item you would be willing to support the development of with regard to the City significantly reducing the number of on-street parking spaces on main streets in Miami Beach.**

____(1) Bike lanes   ____(4) Wider sidewalks   ____(7) Rapid transit or express train
____(2) Bus lanes   ____(5) More shade trees/landscaping   ____(8) None of these
____(3) Trolley cars   ____(6) More lanes for vehicle *(cars)*   ____(9) Don't know

20. <u>COMMUNICATION.</u> **Which source do you normally utilize to obtain information about City government, issues, and events?** *(Check all that apply.)*

____(01) MB Magazine   ____(07) Radio *(1670am)*
____(02) MBTV *(City's TV Government channel)*   ____(08) Forums/workshops/meetings
____(03) Twitter   ____(09) City's E-Gov app
____(04) Facebook   ____(10) Other news media: _____
____(05) City Website *(www.miamibeachfl.gov)*   ____(11) Via HOA's or other civic groups: _____
____(06) City e-mail news

21. **How useful is the information that the City of Miami Beach sends to you about City programs, activities, policies and events?**

____(1) Very useful   ____(2) Somewhat useful   ____(3) Not useful at all   ____(9) Don't know

22. <u>POLICE COMMUNICATION.</u> **In the past 6 months please indicate if you have accessed any of the Police Department's following social media platforms.**

____(1) Twitter   ____(2) Facebook   ____(3) Have not accessed *[Skip to Question 23.]*

  22-2. **How useful is the information provided by the City of Miami Beach Police Department's social media platforms?**

    ____(1) Very useful   ____(2) Somewhat useful   ____(3) Not useful at all   ____(9) Don't know

23. **Please rate your satisfaction with each of the following using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."**

How Satisfied are you with:	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
1. MB Magazine	5	4	3	2	1	9
2. MBTV *(City's government channel)*	5	4	3	2	1	9
3. Social Media engagement *(Twitter, Facebook)*	5	4	3	2	1	9
4. Website	5	4	3	2	1	9
5. E-mail news	5	4	3	2	1	9
6. E-Gov app	5	4	3	2	1	9

24. **CUSTOMER SERVICE.** During the last 12 months, how many times have you personally contacted *(either by phone, in-person, or electronically)* the City of Miami Beach government with a question, service request or complaint?

_____ times *[If more than "0" times, answer Question 24-2.]*

24-2. **What was the reason for your most recent contact?**

____(1) Pay a bill   ____(4) Pull a building permit/plan review   ____(7) Other: _____
____(2) Visit an elected official   ____(5) Attend a program/event   ____(8) Don't remember
____(3) Research an issue   ____(6) File a complaint

25. **If you needed to contact the City, which of the following methods would you likely use first?**

____(1) Phone   ____(4) Attend a community meeting   ____(7) Other: _____
____(2) Send e-mail   ____(5) Social media   ____(9) Don't know
____(3) Contact a commissioner   ____(6) Visit City Hall or a department office

26. **Please rate your agreement with the following statements using a scale of 1 to 5, where 5 means "Strongly Agree" and 1 means "Strongly Disagree," based on your most recent interaction with City employees.** *[If you have not interacted with City employees, select "Don't Know".]*

	Please rate your level of agreement with the following statements:	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know
1.	The City of Miami Beach government is open and interested in hearing the concerns or issues of residents	5	4	3	2	1	9
2.	It is easy to get a hold of someone at the City who can help you	5	4	3	2	1	9
3.	City employees are courteous and professional	5	4	3	2	1	9
4.	City employees have had the proper training	5	4	3	2	1	9
5.	City employees possess the proper knowledge	5	4	3	2	1	9

27. **How satisfied are you with the overall quality of leadership provided by the City's elected officials?**

____(5) Very satisfied   ____(3) Neutral   ____(1) Very dissatisfied
____(4) Satisfied   ____(2) Dissatisfied   ____(9) Don't know

28. **Which of the following best describes the way the tourism industry in Miami Beach affects the quality of life in the City?**

____(1) Adds to the quality of life in the City   ____(3) Detracts from the quality of life in the City
____(2) Neither adds nor detracts from the quality of life in the City   ____(9) Don't know

29. **Think for a moment about whether you would recommend the City of Miami Beach to family and friends as a place to live. Would you:**

____(1) Definitely recommend *[Answer Question 29-2.]*   ____(3) Probably not recommend   ____(9) Don't know
____(2) Probably recommend *[Answer Question 29-2.]*   ____(4) Definitely not recommend

29-2. **Why would you recommend your friends or family to move to Miami Beach?**

_____

30. **What changes would you like to see in Miami Beach that would make the City a better place for you and your family to live, work, play, or visit?**

_____

_____

DEMOGRAPHICS

D1. **Are you of Hispanic origin?** ____(1) Yes ____(2) No

D2. **In which country were you born?** _____

D3. **Which of the following best describes your race?**

____(1) African American/Black ____(3) Asian, Hawaiian/Other Pacific Islander ____(5) Other: _____
____(2) American Indian or Alaska Native ____(4) White

D4. **In what type of residence do you live?**

____(1) Single family home ____(3) Multi-family complex
____(2) Townhome or Condominium ____(4) Other: _____

D5. **Do you own or rent your current residence?** ____(1) Own ____(2) Rent

D6. **Approximately how many years have you lived in the City of Miami Beach?** _____ years

D7. **What is your age?** _____ years

D8. **What is the combined annual income of all members of your household from all sources before taxes?**

____(1) Under $35,000 ____(3) $75,000 to $99,999 ____(5) $150,000 or more
____(2) $35,000 to $74,999 ____(4) $100,000 to $149,999

D9. **What is the primary language spoken in your home?**

____(1) Spanish ____(2) English ____(3) Other: _____

D10. **Do you have children in public school** *(grades K-12)*? ____(1) Yes *[Answer Question 10-2.]* ____(2) No

D10-2. What level of public school does your child/children attend? *(Check all that apply.)*

____(1) Elementary ____(2) Middle school ____(3) High school ____(9) Don't know

D11. **Which of the following BEST describes your household?**

____(1) Single, live alone, single live with roommate or partner ____(5) Married with children
____(2) Single live with domestic partner no children ____(6) Divorced or separated no children
____(3) Single live with domestic partner and children ____(7) Divorced or separated with children
____(4) Married no children ____(8) Prefer not to provide

D12. **On average, how many months per year do you live in Miami Beach?** _____ months

D13. **Your gender:** ____(1) Male ____(2) Female

This concludes the survey – Thank you for your time!
Please return your completed survey in the enclosed postage-paid envelope addressed to:
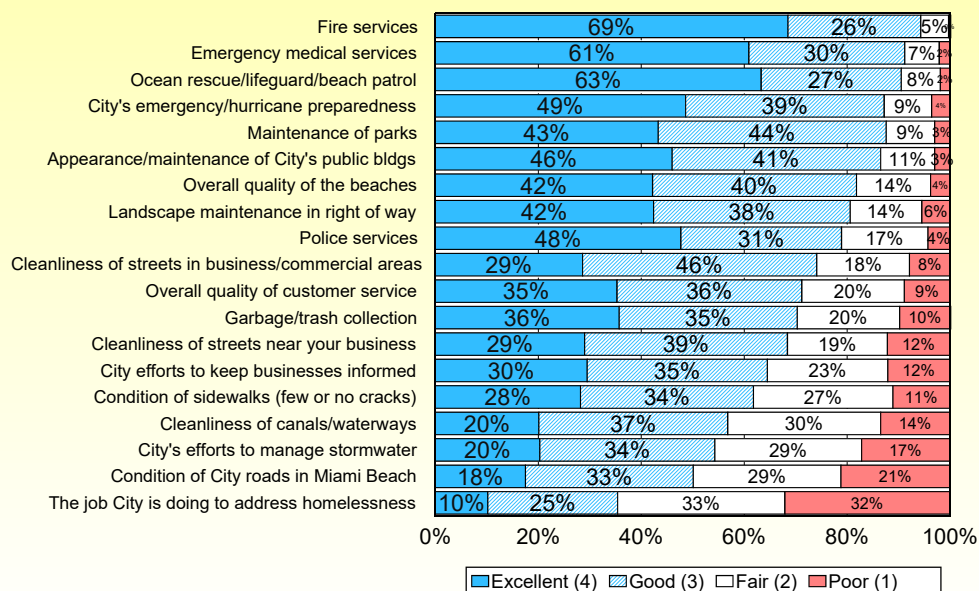ETC Institute, 725 W. Frontier Circle, Olathe, KS 66061

Your responses will remain Completely Confidential. The information printed to the right will ONLY be used to help identify which areas of the City are having problems with City services. If your address is not correct, please provide the correct information. Thank you!

Section 2-1:
Business Survey
Charts & Graphs

Q1. <u>Overall Ratings</u> for the City of Miami Beach
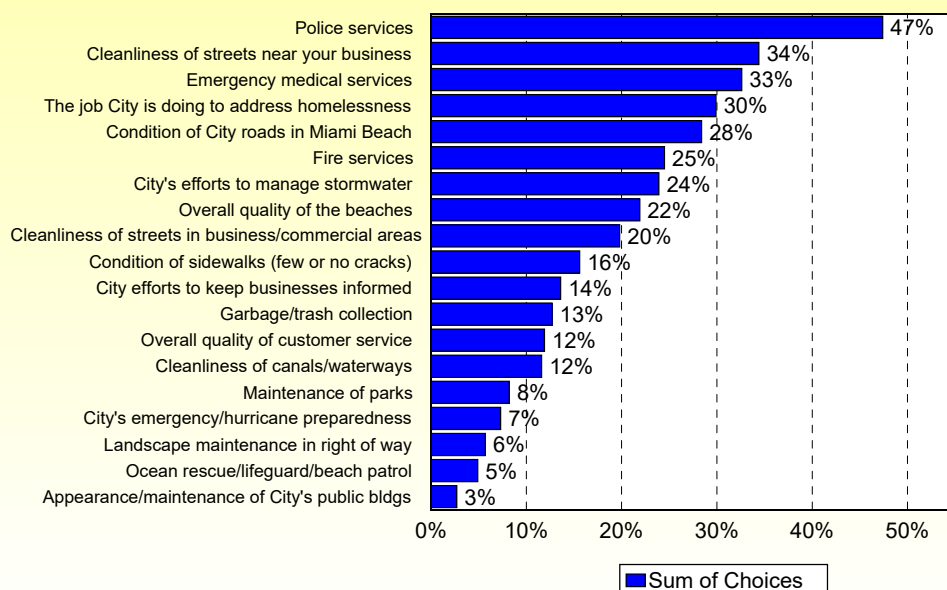by percentage of businesses (<u>excluding "don't know"</u>)

	Excellent (4)	Good (3)	Fair (2)	Poor (1)
Fire services	69%	26%	5%	
Emergency medical services	61%	30%	7%	2%
Ocean rescue/lifeguard/beach patrol	63%	27%	8%	2%
City's emergency/hurricane preparedness	49%	39%	9%	4%
Maintenance of parks	43%	44%	9%	3%
Appearance/maintenance of City's public bldgs	46%	41%	11%	3%
Overall quality of the beaches	42%	40%	14%	4%
Landscape maintenance in right of way	42%	38%	14%	6%
Police services	48%	31%	17%	4%
Cleanliness of streets in business/commercial areas	29%	46%	18%	8%
Overall quality of customer service	35%	36%	20%	9%
Garbage/trash collection	36%	35%	20%	10%
Cleanliness of streets near your business	29%	39%	19%	12%
City efforts to keep businesses informed	30%	35%	23%	12%
Condition of sidewalks (few or no cracks)	28%	34%	27%	11%
Cleanliness of canals/waterways	20%	37%	30%	14%
City's efforts to manage stormwater	20%	34%	29%	17%
Condition of City roads in Miami Beach	18%	33%	29%	21%
The job City is doing to address homelessness	10%	25%	33%	32%

Source: ETC Institute (2016 - Miami Beach Business Survey)

Q2. Services That Are Most Important for the City to Provide
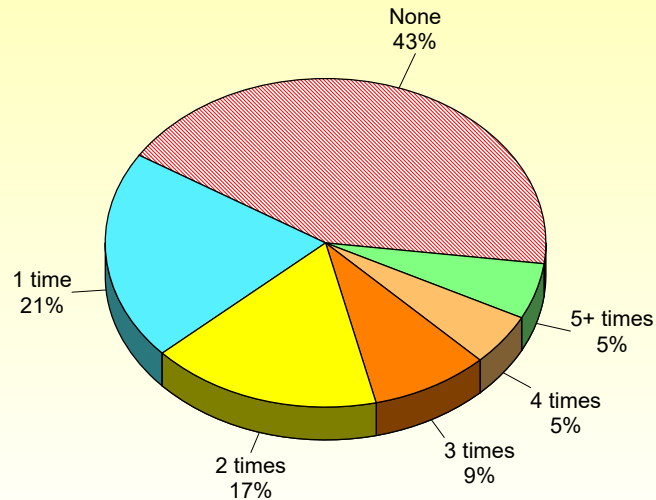by percentage of businesses that selected the item as one of its top five choices

	Sum of Choices
Police services	47%
Cleanliness of streets near your business	34%
Emergency medical services	33%
The job City is doing to address homelessness	30%
Condition of City roads in Miami Beach	28%
Fire services	25%
City's efforts to manage stormwater	24%
Overall quality of the beaches	22%
Cleanliness of streets in business/commercial areas	20%
Condition of sidewalks (few or no cracks)	16%
City efforts to keep businesses informed	14%
Garbage/trash collection	13%
Overall quality of customer service	12%
Cleanliness of canals/waterways	12%
Maintenance of parks	8%
City's emergency/hurricane preparedness	7%
Landscape maintenance in right of way	6%
Ocean rescue/lifeguard/beach patrol	5%
Appearance/maintenance of City's public bldgs	3%

Source: ETC Institute (2016 - Miami Beach Business Survey)

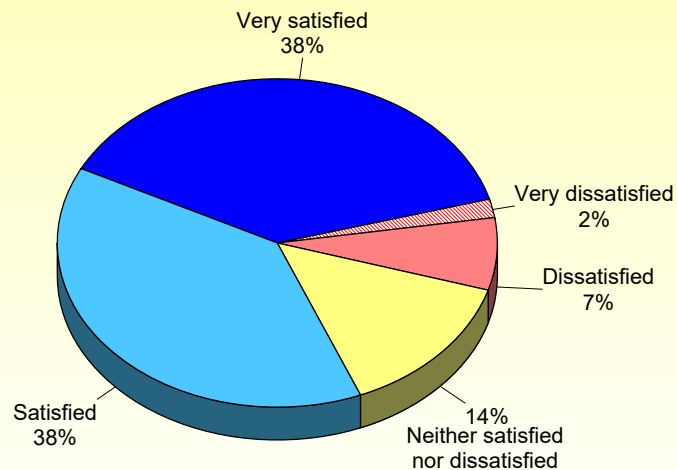## Q3. During the past 12 months, how many times has your establishment been inspected?
by percentage of businesses (excluding "don't know")

None
43%

5+ times
5%

4 times
5%

3 times
9%

2 times
17%

1 time
21%

Source: ETC Institute (2016 - Miami Beach Business Survey)

## Q3-2. Satisfaction With the Consistency and Fairness of City Inspections
by percentage of businesses that have been inspected during the past 12 months (excluding "don't know")

Very satisfied
38%

Very dissatisfied
2%

Dissatisfied
7%

14%
Neither satisfied
nor dissatisfied

Satisfied
38%

Source: ETC Institute (2016 - Miami Beach Business Survey)

Q4. During the past 3 years, how many times have you contacted or had any direct experience with the Miami Beach Planning Department?

by percentage of businesses (excluding "don't know")

None
82%

1 time
6%

2 times
3%

3 times
3%

4 times
1%

5 times
2%

6+ times
3%
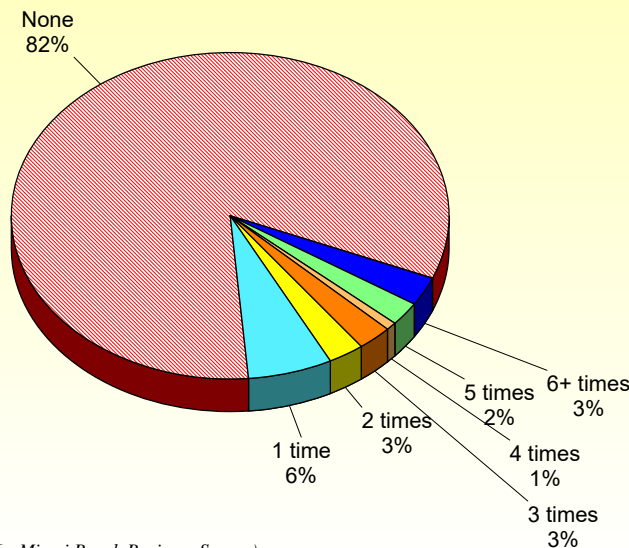
Source: ETC Institute (2016 - Miami Beach Business Survey)

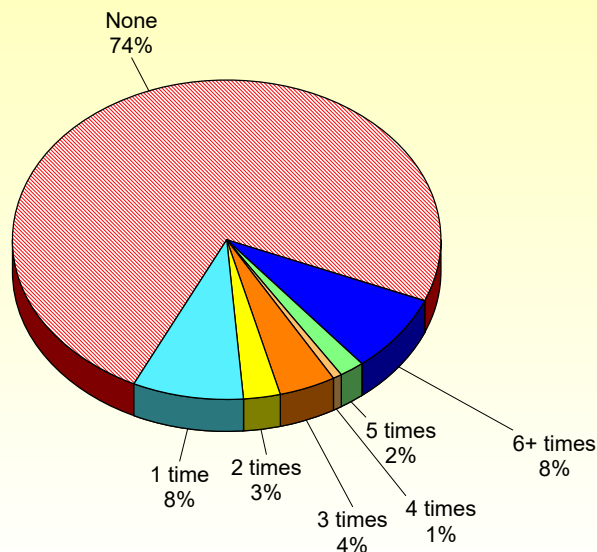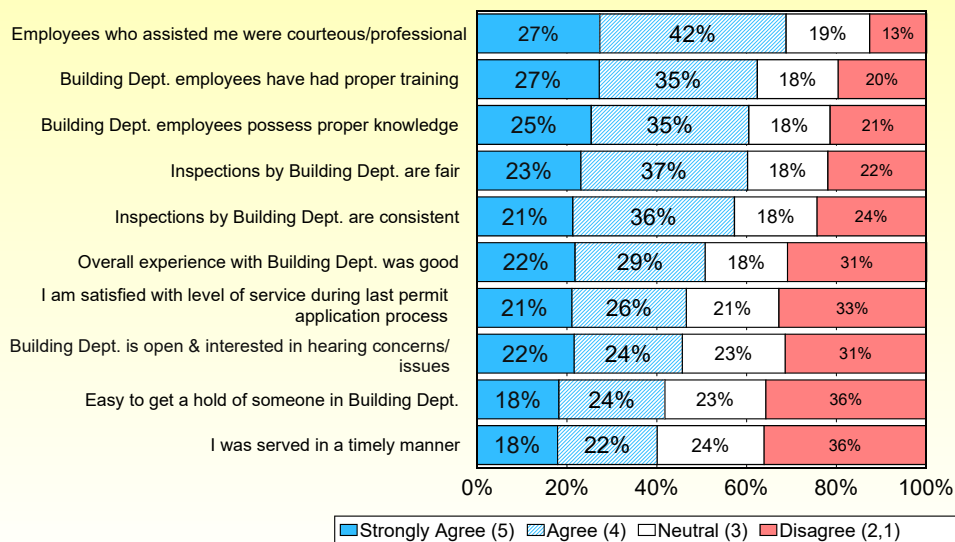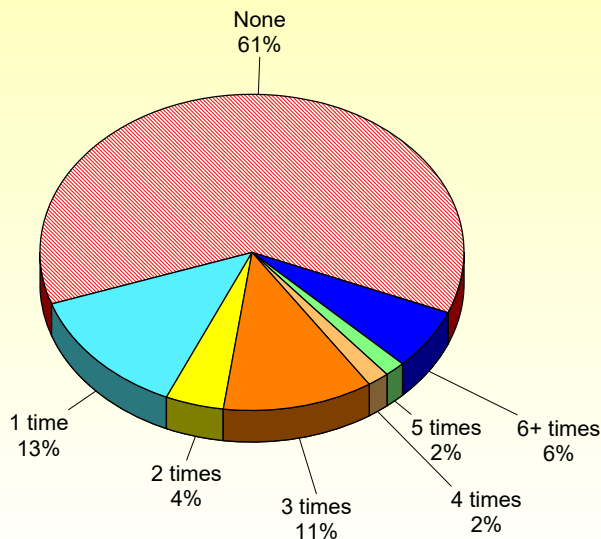## Q4-2. Level of Agreement With the Following Statements Regarding the Planning Department

by percentage of businesses that have been in contact with the Planning Department during the past 3 years (excluding "don't know")

Statement	Strongly Agree (5)	Agree (4)	Neutral (3)	Disagree (2,1)
Employees who assisted me were courteous/professional	38%	32%	17%	13%
Planning Dept. employees have had proper training	21%	44%	19%	16%
Planning Dept. employees possess proper knowledge	18%	45%	18%	20%
Overall experience with Planning Dept. was good	20%	40%	20%	21%
Inspections by Planning Dept. are fair	30%	26%	28%	17%
Inspections by Planning Dept. are consistent	25%	28%	25%	22%
Planning Dept. is open & interested in hearing concerns/issues	20%	28%	26%	26%
Easy to get a hold of someone in Planning Dept.	19%	27%	27%	27%
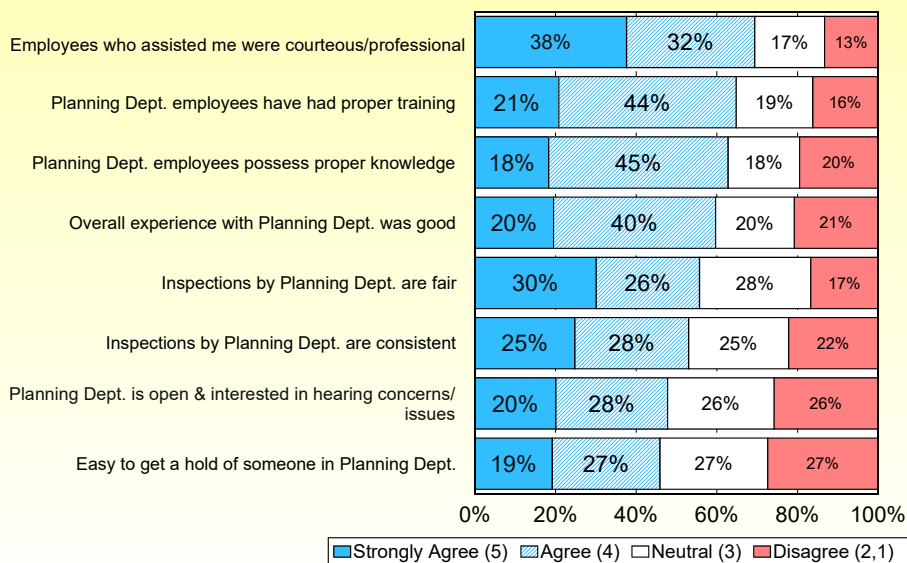
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q5. During the past 3 years, how many times have you contacted or had any direct experience with the Miami Beach Building Department?
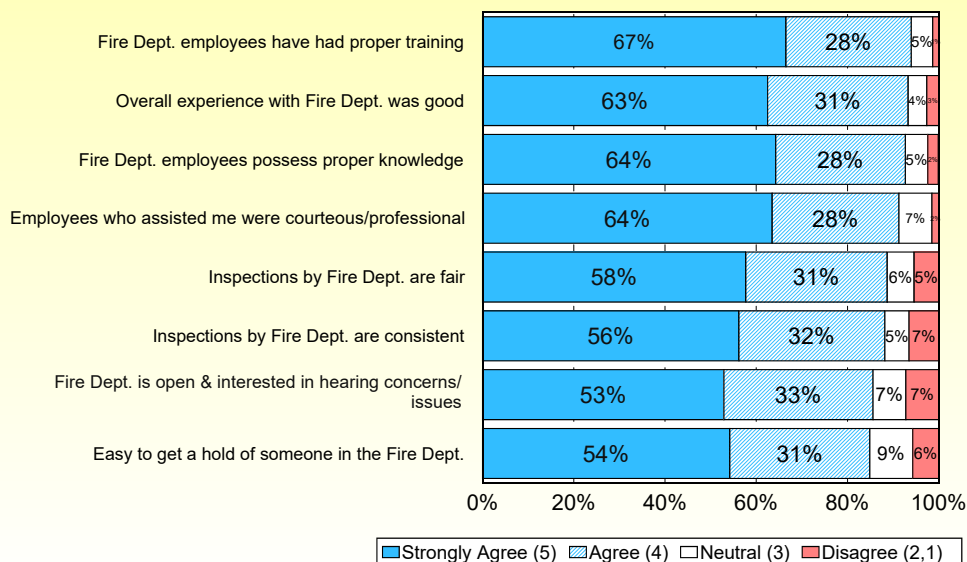
by percentage of businesses

None
74%

1 time
8%

2 times
3%

3 times
4%

4 times
1%

5 times
2%

6+ times
8%

Source: ETC Institute (2016 - Miami Beach Business Survey)

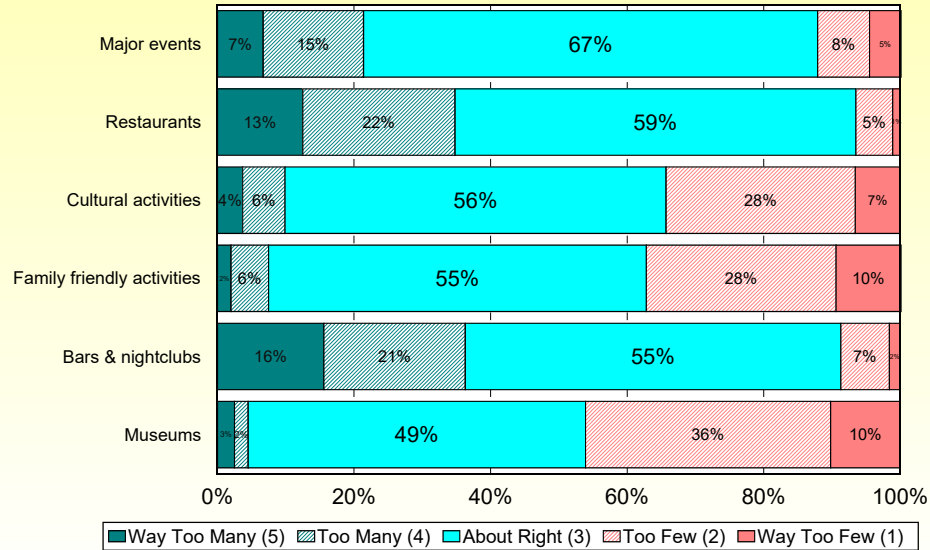## Q5-2. Level of Agreement With the Following Statements Regarding the Building Department

by percentage of businesses that have been in contact with the Building Department
during the past 3 years (excluding "don't know")

Statement	Strongly Agree (5)	Agree (4)	Neutral (3)	Disagree (2,1)
Employees who assisted me were courteous/professional	27%	42%	19%	13%
Building Dept. employees have had proper training	27%	35%	18%	20%
Building Dept. employees possess proper knowledge	25%	35%	18%	21%
Inspections by Building Dept. are fair	23%	37%	18%	22%
Inspections by Building Dept. are consistent	21%	36%	18%	24%
Overall experience with Building Dept. was good	22%	29%	18%	31%
I am satisfied with level of service during last permit application process	21%	26%	21%	33%
Building Dept. is open & interested in hearing concerns/issues	22%	24%	23%	31%
Easy to get a hold of someone in Building Dept.	18%	24%	23%	36%
I was served in a timely manner	18%	22%	24%	36%

■ Strongly Agree (5)　▨ Agree (4)　□ Neutral (3)　■ Disagree (2,1)

Source: ETC Institute (2016 - Miami Beach Business Survey)

Q6. During the past 3 years, how many times have you contacted or had any direct experience with the Miami Beach Fire Department?

by percentage of businesses

None
61%

1 time
13%

2 times
4%

3 times
11%

4 times
2%

5 times
2%

6+ times
6%

Source: ETC Institute (2016 - Miami Beach Business Survey)

Q6-2. Level of Agreement With the Following Statements Regarding the Fire Department

by percentage of businesses that have been in contact with the Fire Department
during the past 3 years (excluding "don't know")

Statement	Strongly Agree (5)	Agree (4)	Neutral (3)	Disagree (2,1)
Fire Dept. employees have had proper training	67%	28%	5%	
Overall experience with Fire Dept. was good	63%	31%	4%	
Fire Dept. employees possess proper knowledge	64%	28%	5%	
Employees who assisted me were courteous/professional	64%	28%	7%	
Inspections by Fire Dept. are fair	58%	31%	6%	5%
Inspections by Fire Dept. are consistent	56%	32%	5%	7%
Fire Dept. is open & interested in hearing concerns/ issues	53%	33%	7%	7%
Easy to get a hold of someone in the Fire Dept.	54%	31%	9%	6%

0%   20%   40%   60%   80%   100%

■ Strongly Agree (5) ▨ Agree (4) ☐ Neutral (3) ■ Disagree (2,1)

Source: ETC Institute (2016 - Miami Beach Business Survey)

Q7. How Businesses Feel About the Number of the Following Amenities in the City of Miami Beach
by percentage of businesses (excluding "don't know")

Amenity	Way Too Many (5)	Too Many (4)	About Right (3)	Too Few (2)	Way Too Few (1)
Major events	7%	15%	67%	8%	5%
Restaurants	13%	22%	59%	5%	
Cultural activities	4%	6%	56%	28%	7%
Family friendly activities		6%	55%	28%	10%
Bars & nightclubs	16%	21%	55%	7%	
Museums			49%	36%	10%

Source: ETC Institute (2016 - Miami Beach Business Survey)

## Q8. Do you think the Miami Beach Convention Center adds to the success of your business?
by percentage of businesses (excluding "don't know")

Yes 54%
No 46%
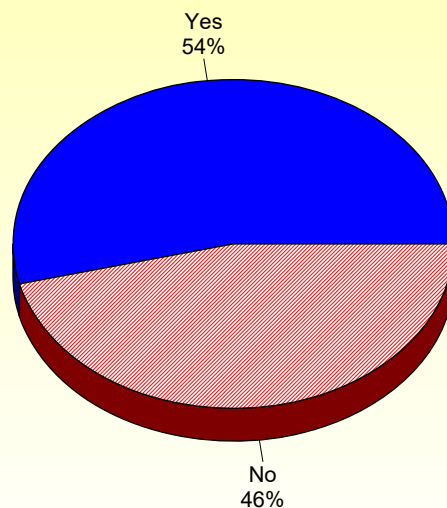
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q9. Do you think the tourism industry in Miami Beach adds to the success of your business?
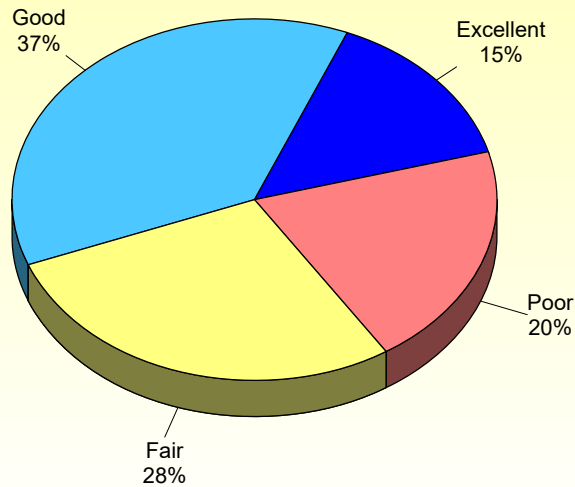
by percentage of businesses (excluding "don't know")

Yes
72%

No
28%
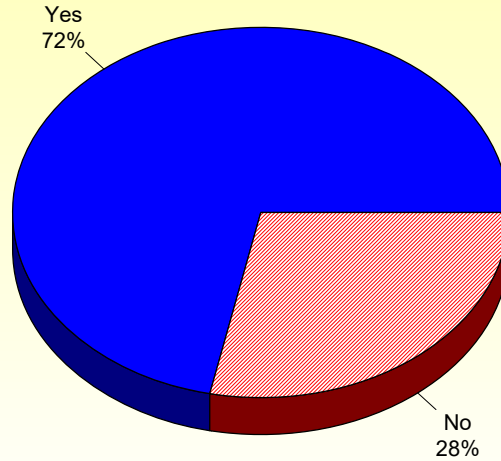
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q10. <u>Feeling of Safety</u> in Miami Beach

by percentage of respondents (excluding "don't know")

In/around place of business during daytime: Very Safe (5) 54% | Safe (4) 28% | Somewhat Safe (3) 12% | Unsafe (2,1) 6%

In/around place of business during evening/night: Very Safe (5) 31% | Safe (4) 24% | Somewhat Safe (3) 25% | Unsafe (2,1) 20%

0%   20%   40%   60%   80%   100%

■ Very Safe (5)   ▨ Safe (4)   □ Somewhat Safe (3)   ■ Unsafe (2,1)
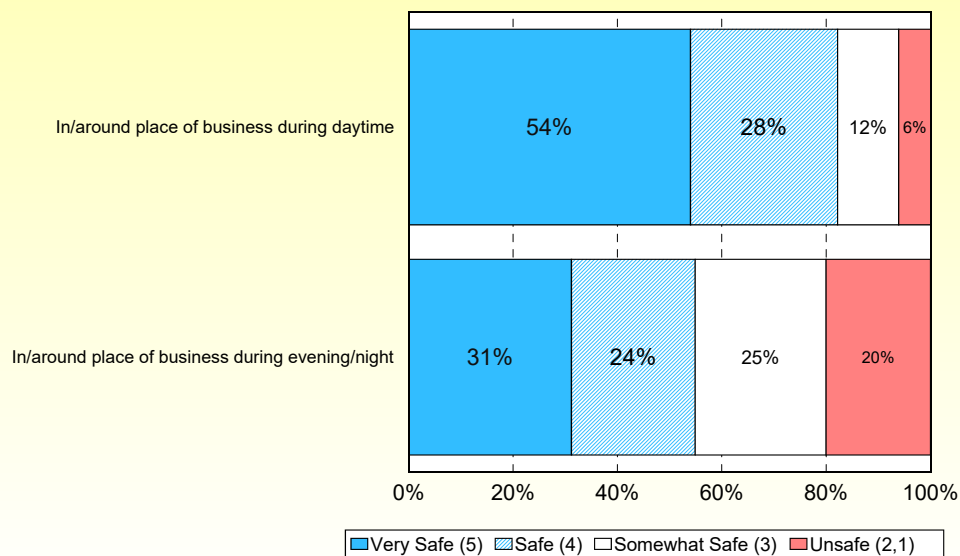
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q11. Do you think the amount of street lighting near your business is:
by percentage of businesses (excluding "don't know")

About right
69%

Too much/too bright
2%

Too little/too dark
29%
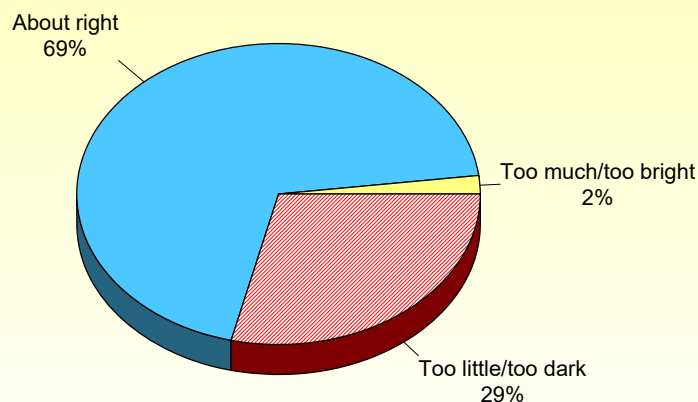
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q12. Satisfaction With Various Perceptions of the City
by percentage of businesses (excluding "don't know")

	Very Satisfied (5)	Satisfied (4)	Neutral (3)	Dissatisfied (2,1)
Overall quality of services provided	22%	38%	26%	13%
City meeting expectations with services provided	21%	37%	25%	17%
City efforts to be a "green" or sustainable City	16%	29%	27%	29%
Value received for City taxes paid	16%	28%	34%	22%
City regulation of residential development	15%	19%	28%	39%
City regulation of commercial development	11%	22%	30%	37%
Stormwater drainage	10%	18%	31%	41%
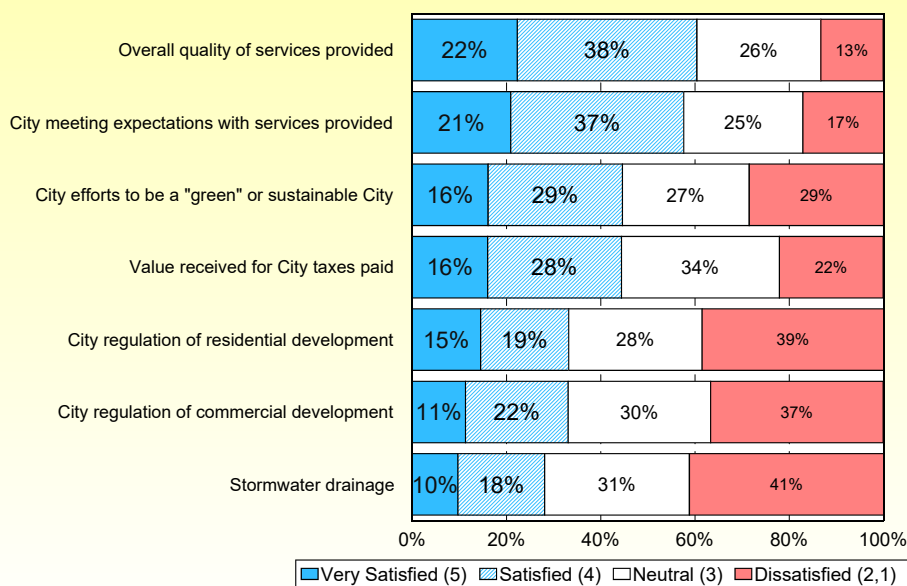
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q13. Level of Agreement With the Following Statements
by percentage of businesses (excluding "don't know")

Statement	Strongly Agree (5)	Agree (4)	Neutral (3)	Disagree (2,1)
Sustainability/resiliency are important to my business	49%	32%	14%	5%
I have taken steps to make my business more energy efficient	34%	39%	17%	10%
I have observed coastal water level increases	42%	31%	12%	16%
I have observed increased flooding	39%	31%	14%	16%
I have taken steps to make my business more water efficient	32%	37%	18%	14%
I am informed about local climate change issues	32%	32%	17%	19%
I have observed increased water temperatures	24%	32%	18%	26%
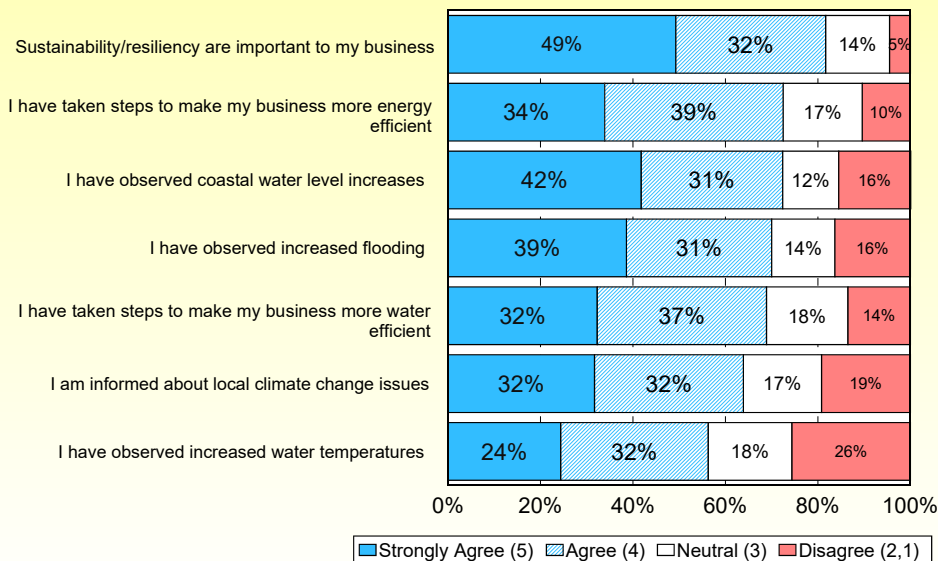
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q14. Do you think the level of code enforcement and ordinance near your business is:
by percentage of businesses (excluding "don't know")

- Too much/too restrictive 27%
- About right 59%
- Too little/not restrictive enough 14%
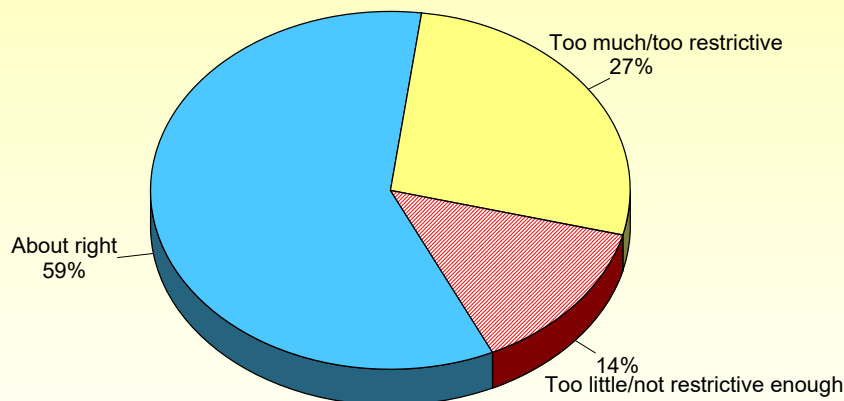
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q15. Do you support or oppose the City of Miami Beach spending tax dollars to address rising sea levels?
by percentage of businesses (excluding "don't know")

Support
89%

Oppose
11%
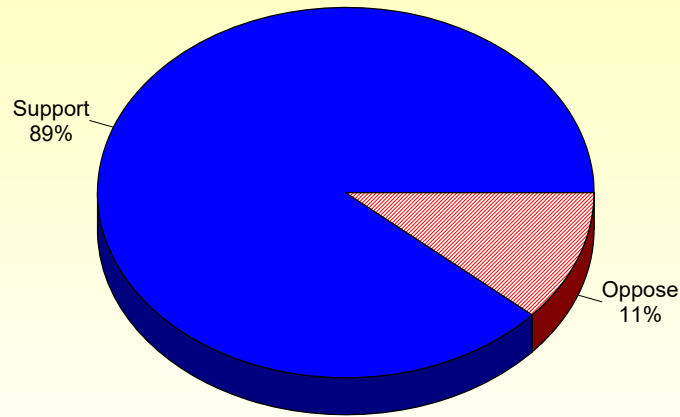
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q16. Do you think historic preservation efforts in the City of Miami Beach have been:
by percentage of businesses (excluding "don't know")

Very effective
20%

Somewhat effective
43%

Very ineffective
5%

Somewhat ineffective
12%

20%
Neither effective nor ineffective
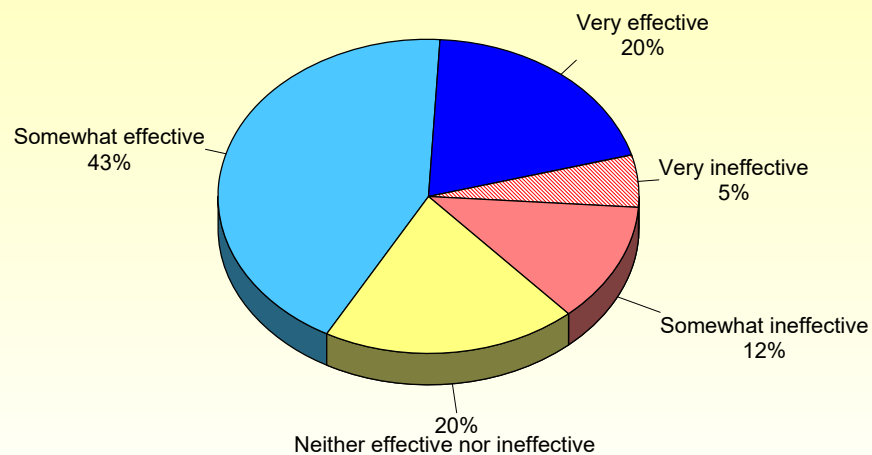
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q17. Overall Effectiveness of the Public Transit System That Serves the City of Miami Beach
by percentage of businesses (excluding "don't know")

Good
37%

Excellent
15%

Poor
20%

Fair
28%

Source: ETC Institute (2016 - Miami Beach Business Survey)

Q18. Overall Effectiveness of Public Transit in Bringing Employees to the City of Miami Beach
by percentage of businesses (excluding "don't know")

Good
29%

Excellent
14%

Poor
27%

Fair
31%
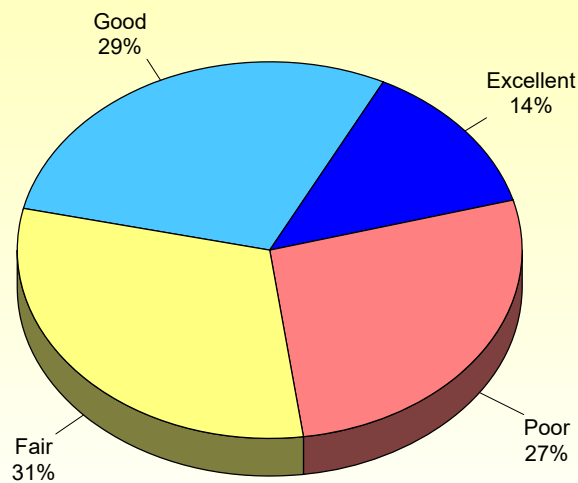
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q19. Which of the following has your business done to provide additional transit options for your employees?

by percentage of businesses (multiple selections could be made)

Option	Percentage
Provide free or subsidized parking spots	28%
Encourage public transit use	14%
Coordinate carpool(s)	8%
Other	1%
None at this time	57%
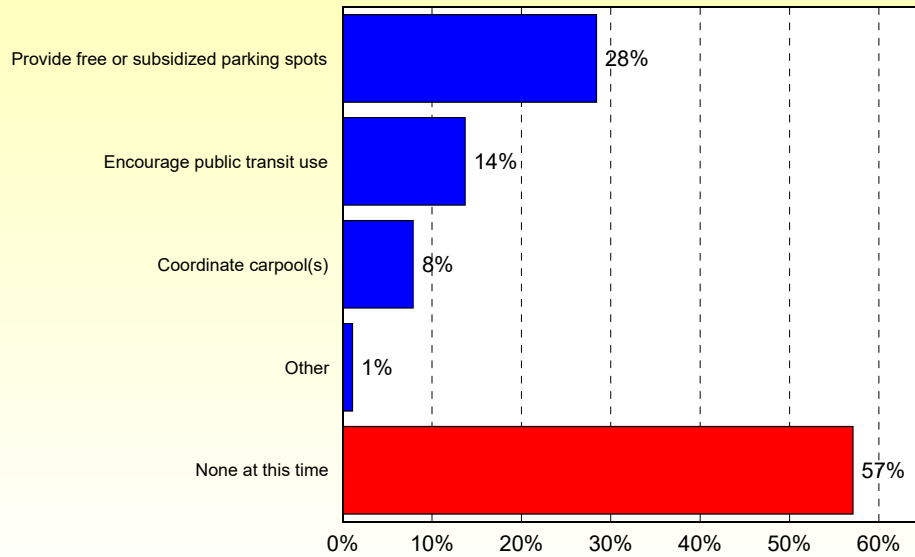
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q19. Other Transit Options

by percentage of businesses

- Uber/Lyft 27%
- Disabled parking option 9%
- Parking pass 9%
- Paying for parking tickets 9%
- Rideshare 9%
- Coordinate transportation for employees 9%
- Walk/bike 18%
- Utilize other business properties 9%
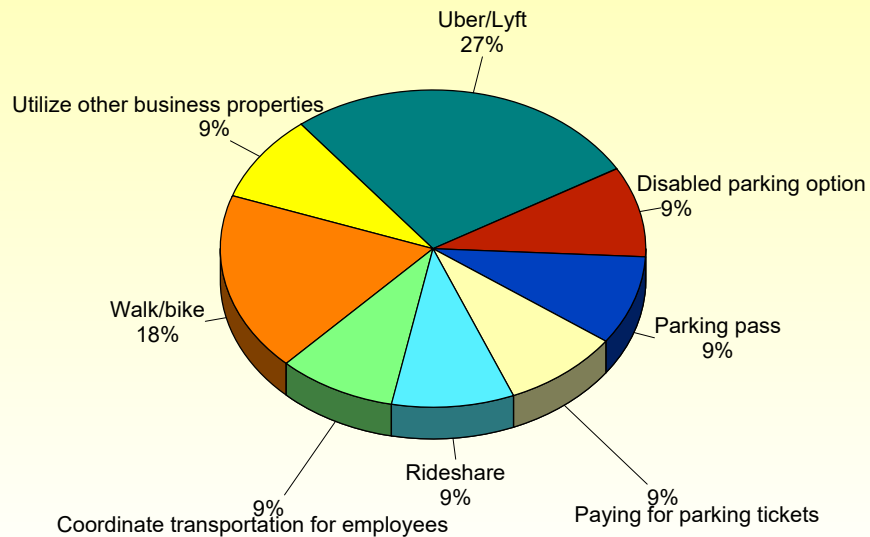
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q20. Which of the following best describes the availability of public and private parking for your customers?

by percentage of businesses (excluding "don't know")

There are often
parking spaces nearby
19%

There are almost always
parking places nearby
14%

There are seldom
parking places nearby
30%

38%
There are almost never
parking places nearby
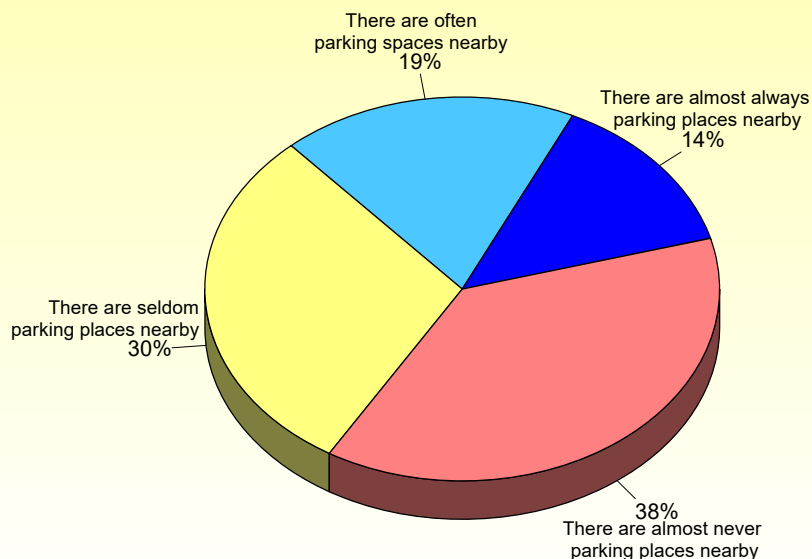
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q21. Which source do you utilize to obtain information about city government, issues, and events?

by percentage of businesses (multiple selections could be made)

Source	Percentage
City Website (www.miamibeachfl.gov)	54%
MB Magazine	38%
Facebook	24%
City e-mail news	22%
Twitter	13%
MBTV (City's TV Government channel)	9%
City's E-Gov app	7%
Forums/workshops/meetings	6%
Radio (1670am)	5%
Other news media	5%
HOA's or other civic groups	1%

0%   10%   20%   30%   40%   50%   60%
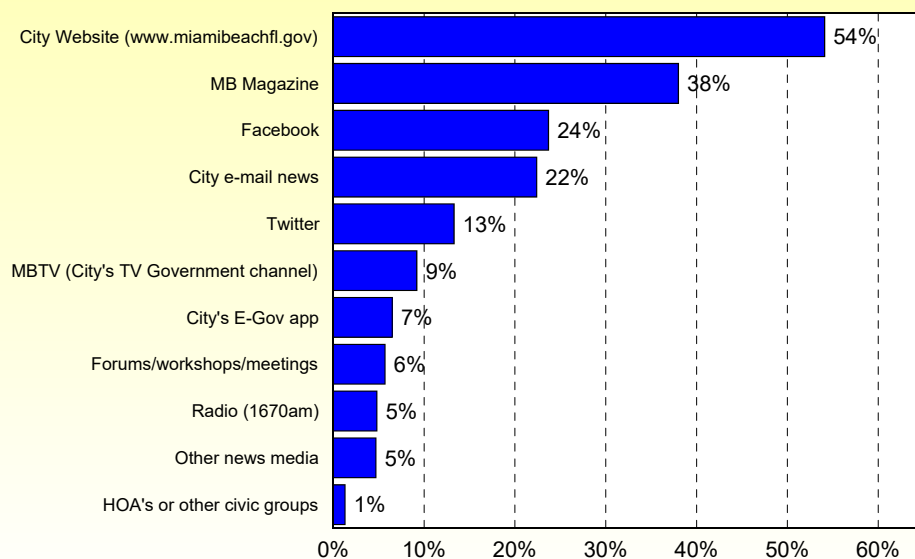
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q21-10. Other News Media
by percentage of businesses

Local news/TV/radio
42%

Newspapers
19%

Various other sources
39%
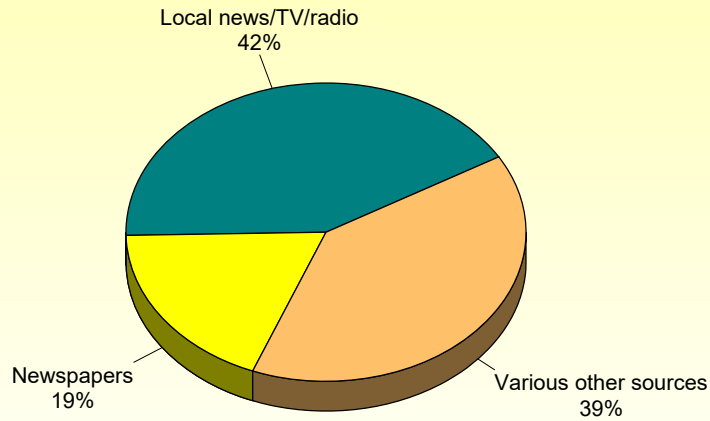
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q21-11. HOA's or Other Civic Groups
by percentage of businesses

Chamber of Commerce
36%

Friends/neighbors
18%

Other groups
27%

HOA's
18%
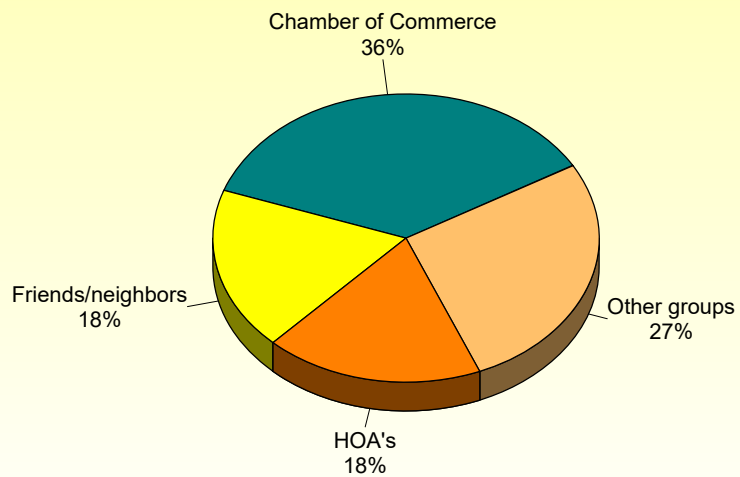
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q22. Usefulness of Information That the City of Miami Beach Sends About City Programs, Activities, Policies and Events
by percentage of businesses (excluding "don't know")

Very useful
41%

Not useful at all
7%

Somewhat useful
52%
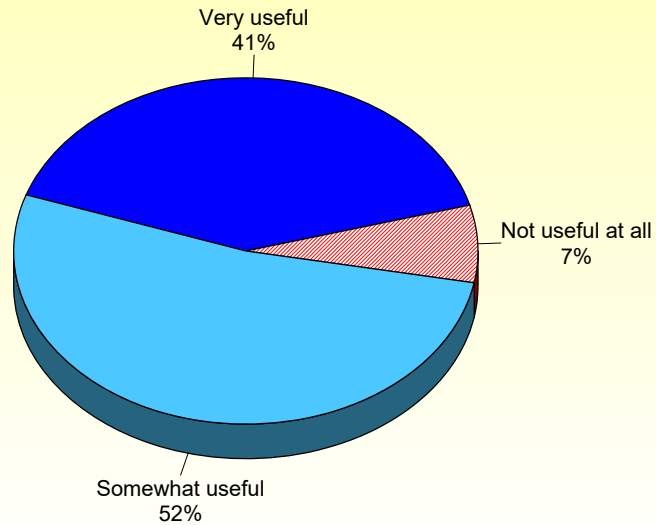
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q23. Social Media Platforms That Businesses Have Accessed
by percentage of businesses

Facebook
6%

Twitter
4%

Have not accessed
90%
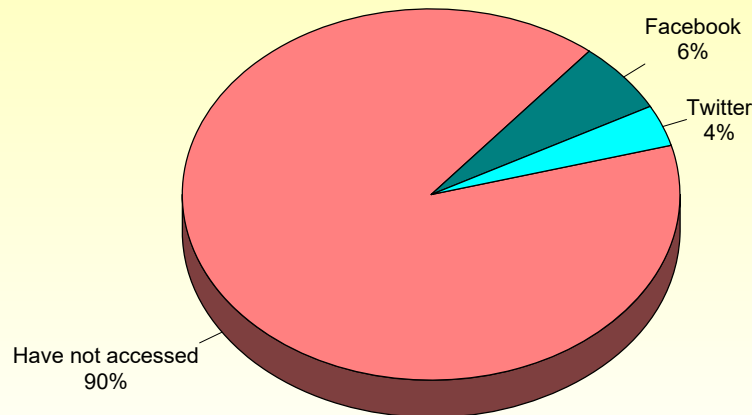
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q23-2. Usefulness of Information Provided on the Police Department's Social Media Platform(s)
by percentage of businesses that utilized the Police Department's social media platform(s)
(excluding "don't know")

Very useful
53%

Not useful at all
11%

Somewhat useful
36%
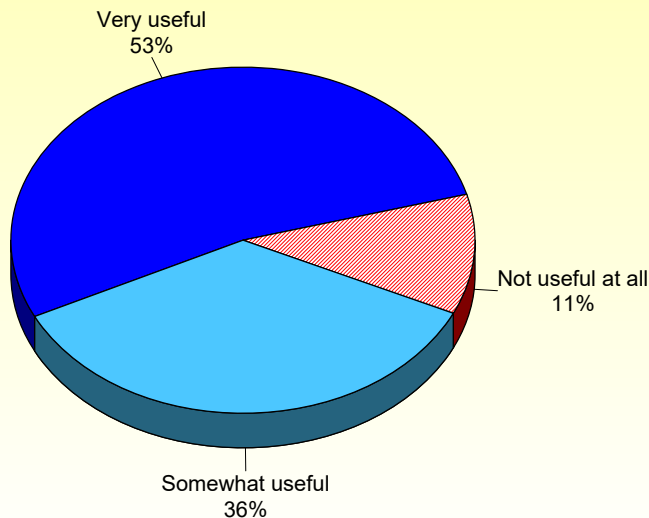
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q24. Satisfaction With Various Sources of City Communication
by percentage of respondents (excluding "don't know")

	Very Satisfied (5)	Satisfied (4)	Neutral (3)	Dissatisfied (2,1)
Email news	32%	41%	21%	6%
MB Magazine	28%	44%	20%	7%
Website	25%	45%	22%	8%
Social Media engagement (Twitter, Facebook)	20%	44%	29%	7%
MBTV (City's government channel)	29%	31%	33%	8%
E-Gov app	12%	38%	39%	11%
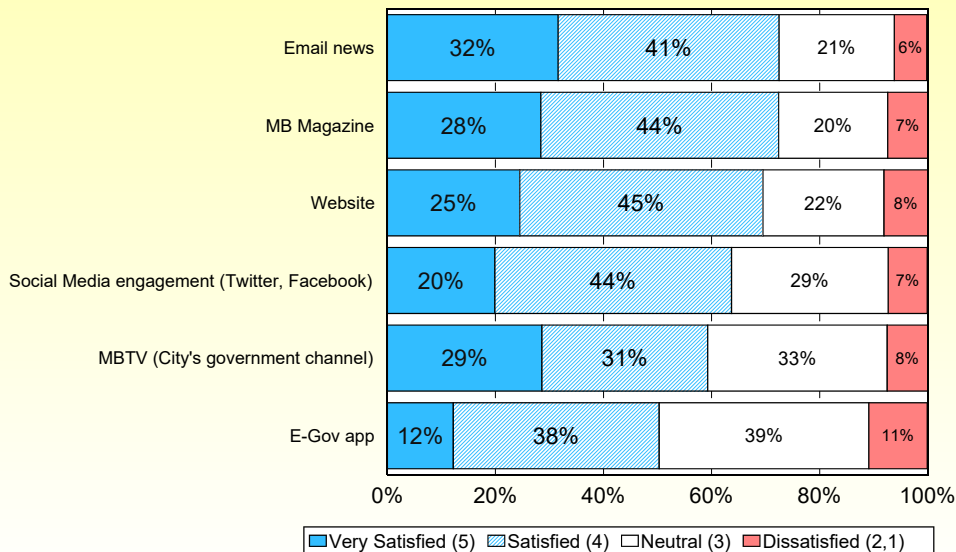
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q25. During the last 12 months, how many times have you personally contacted the City of Miami Beach government with a question, service request or complaint?
by percentage of businesses

None
56%

1 time
13%

2 times
7%

3 times
6%

4 times
5%

5 times
4%

6+ times
11%
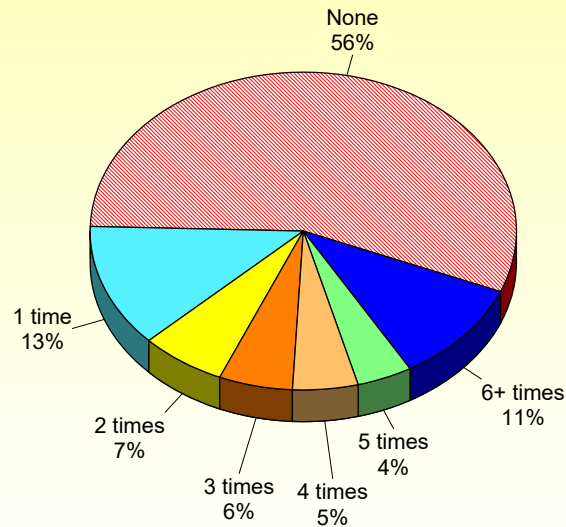
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q25-2. Reasons for Most Recent Contact With the City
by percentage of businesses that contacted the City in the last 12 months

Pay a bill
13%

Visit an elected official
3%

Don't remember
3%

Research an issue
22%

Other
22%

Pull a building permit/plan review
13%

File a complaint
25%
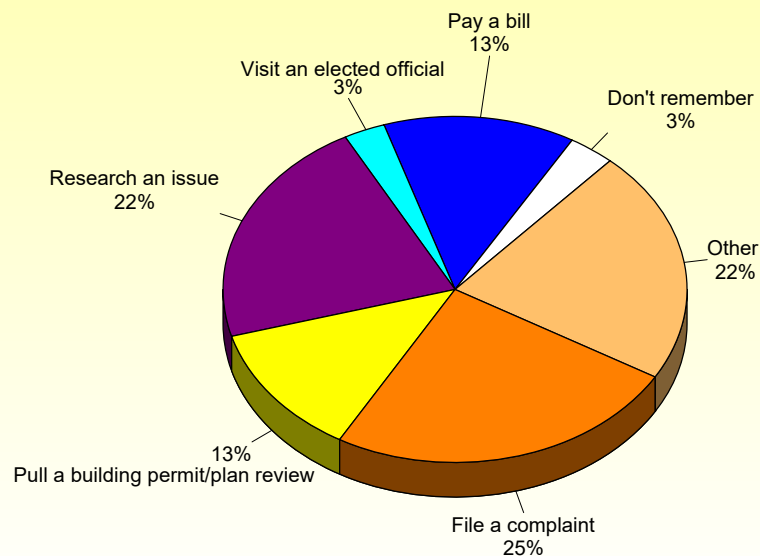
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q25-2. Other Reasons for Contact With City
by percentage of businesses

Code enforcement
9%

Water or sewer-related issues
15%

Parking-related issues
24%

Various other reasons
52%
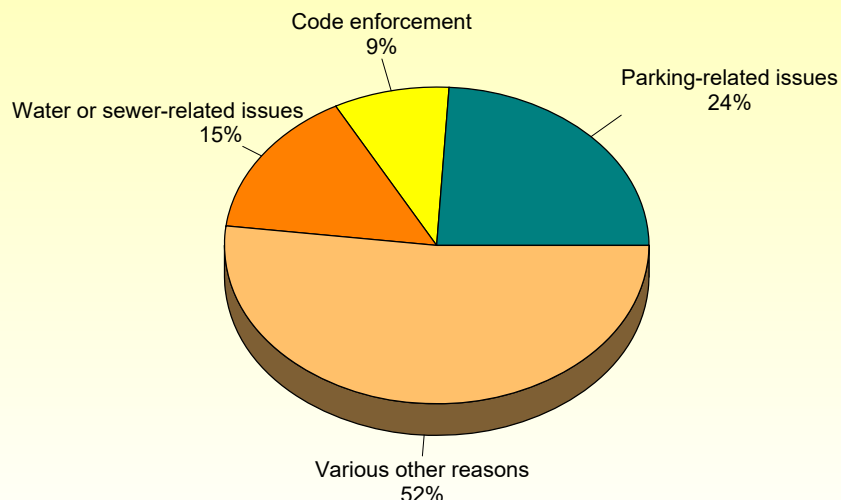
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q26. Level of Agreement With Statements Regarding Interaction With City Employees
by percentage of businesses (excluding "don't know")

Statement	Strongly Agree (5)	Agree (4)	Neutral (3)	Disagree (2,1)
City employees are courteous/professional	24%	41%	21%	14%
City employees have had proper training	21%	42%	22%	15%
City employees possess proper knowledge	23%	38%	24%	15%
Overall I was satisfied with experience I had contacting the City	22%	38%	20%	21%
Requests made were processed in a timely manner	23%	33%	23%	21%
I found process to be user-friendly/easy to understand	21%	34%	25%	21%
The City is open & interested in hearing concerns/issues	22%	31%	25%	22%
Easy to get a hold of someone at the City	19%	28%	25%	28%

0%   20%   40%   60%   80%   100%

■ Strongly Agree (5) ▨ Agree (4) □ Neutral (3) ▨ Disagree (2,1)

Source: ETC Institute (2016 - Miami Beach Business Survey)

Q27. Satisfaction With the Overall Quality of Leadership Provided by the City's Elected Officials:
by percentage of businesses (excluding "don't know")

Satisfied
38%

Very satisfied
15%

Very dissatisfied
5%

Dissatisfied
14%

Neutral
28%
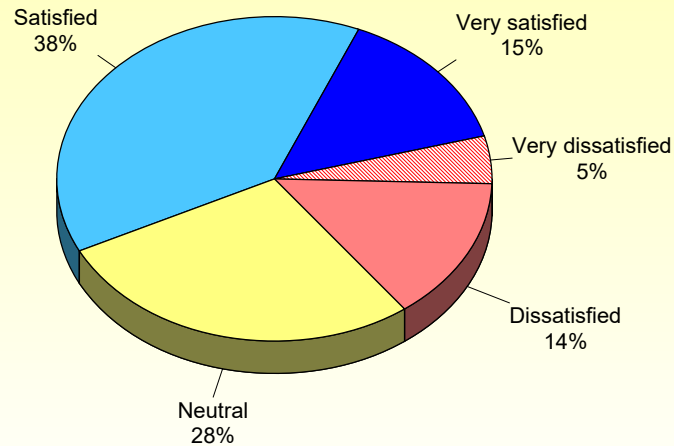
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q29. Compared to operating a business in other cities, how would you rate Miami Beach as a place to run a business?
by percentage of businesses (excluding "don't know")

Better
31%

About the same
42%

Worse
27%
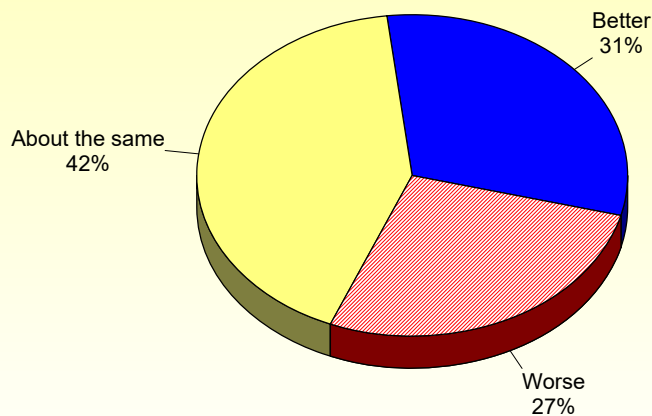
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q30. Compared to previous years, how would you currently rate the City of Miami Beach as a place to do business?
by percentage of businesses (excluding "don't know")

Gotten better
29%

About the same
48%

Gotten worse
23%
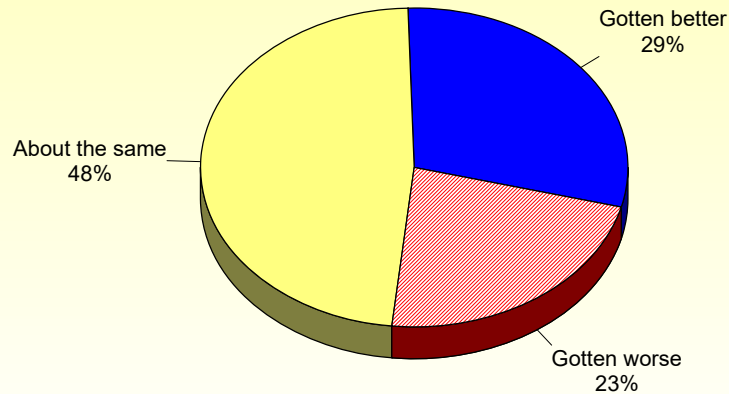
Source: ETC Institute (2016 - Miami Beach Business Survey)

Q31. Likelihood of Recommending the City of Miami Beach to Others as a Place to Run a Business
by percentage of businesses (excluding "don't know")

Definitely recommend
35%

Definitely not recommend
11%

Probably recommend
37%

Probably not recommend
17%
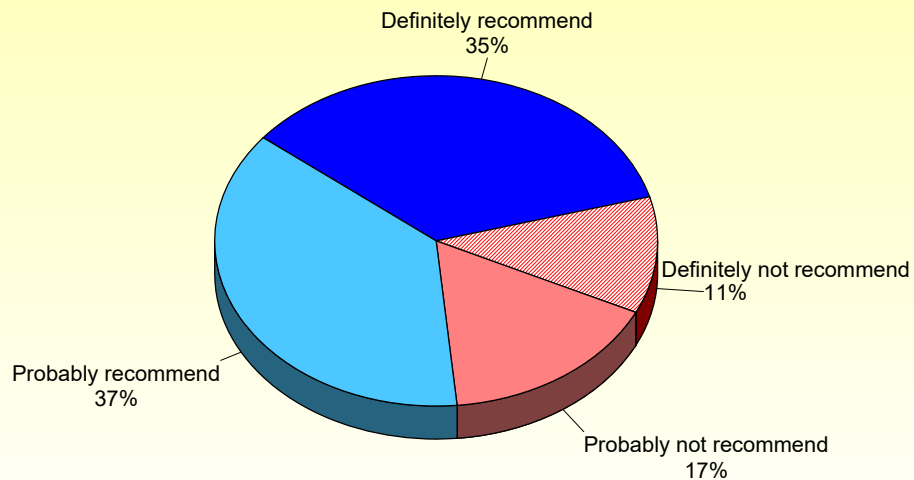
Source: ETC Institute (2016 - Miami Beach Business Survey)

DEMOGRAPHICS

QD1. Are you an owner or manager at your business?
by percentage of businesses

Yes
97%

No
3%
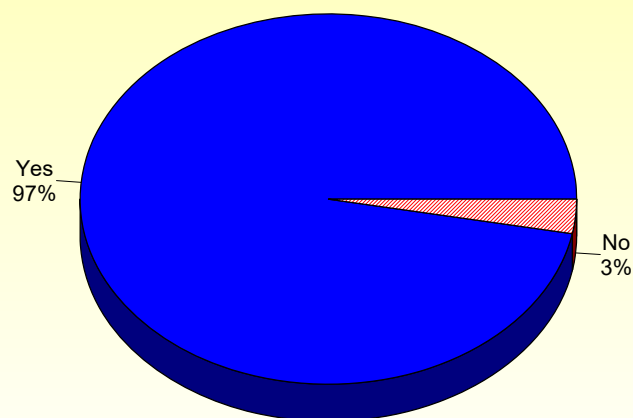
Source: ETC Institute (2016 - Miami Beach Business Survey)

QD2. How long has your business been in the City of Miami Beach?
by percentage of businesses

6 to 10 years
23%

2 to 5 years
18%

Less than 2 years
5%

11 to 20 years
27%

21+ years
27%
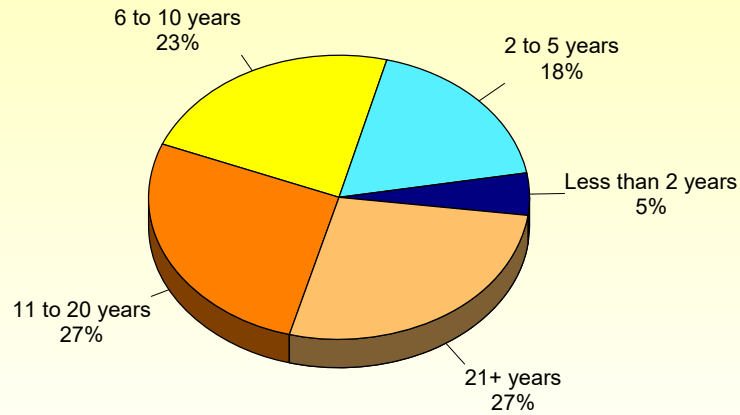
Source: ETC Institute (2016 - Miami Beach Business Survey)

QD3. Approximately how many full-time employees does your business currently have?
by percentage of businesses (excluding "not provided")

Less than 5
55%

51+
5%

25 to 50
7%

11 to 24
15%

5 to 10
18%
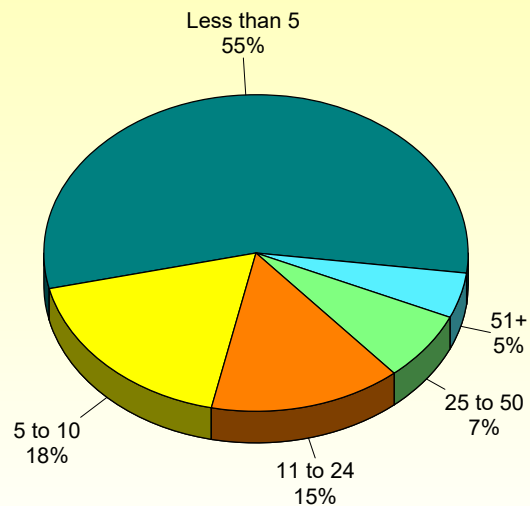
Source: ETC Institute (2016 - Miami Beach Business Survey)

QD4. Approximately how many <u>part-time employees</u> does your business currently have?
by percentage of businesses (<u>excluding "not provided"</u>)

Less than 5
80%

51+
1%

25 to 50
3%

11 to 24
6%

5 to 10
10%
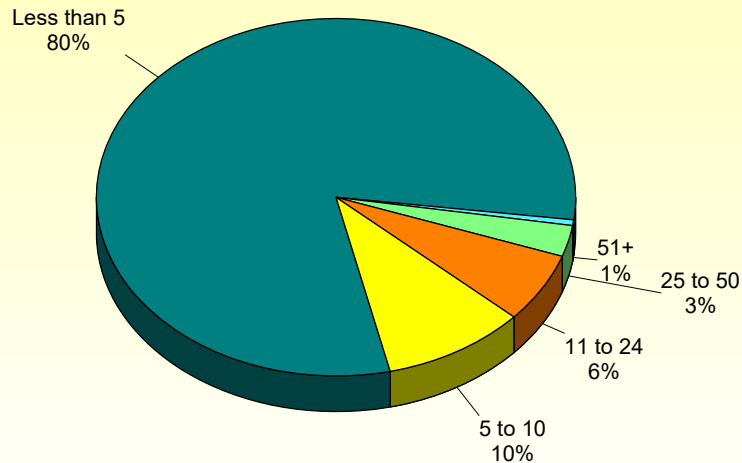
Source: ETC Institute (2016 - Miami Beach Business Survey)

## QD5. On average, what is the annual gross sales/revenue of your business?
by percentage of businesses (<u>excluding "not provided"</u>)

Under $500,000
51%

$10 million or more
6%

$5 million-$9,999,999
5%

$2 million-$4,999,999
11%

$1million-$1,999,999
17%

$500K-$999,999
10%
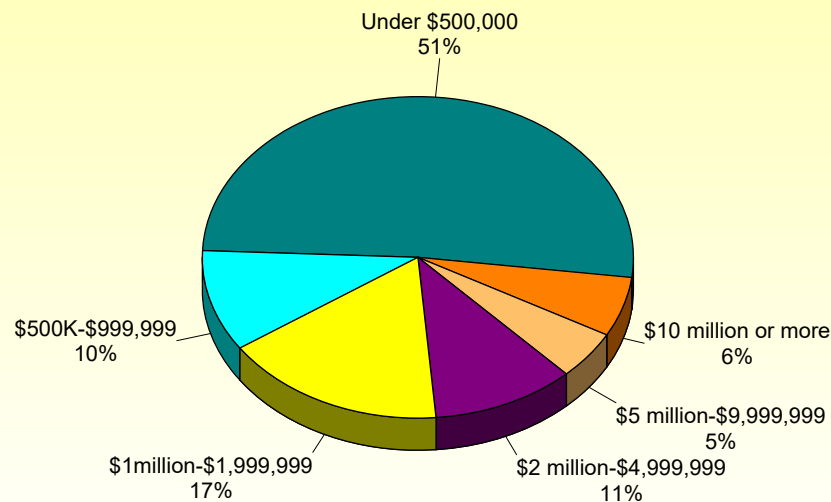
Source: ETC Institute (2016 - Miami Beach Business Survey)

QD6. How many locations do you have <u>inside</u> the City of Miami Beach?
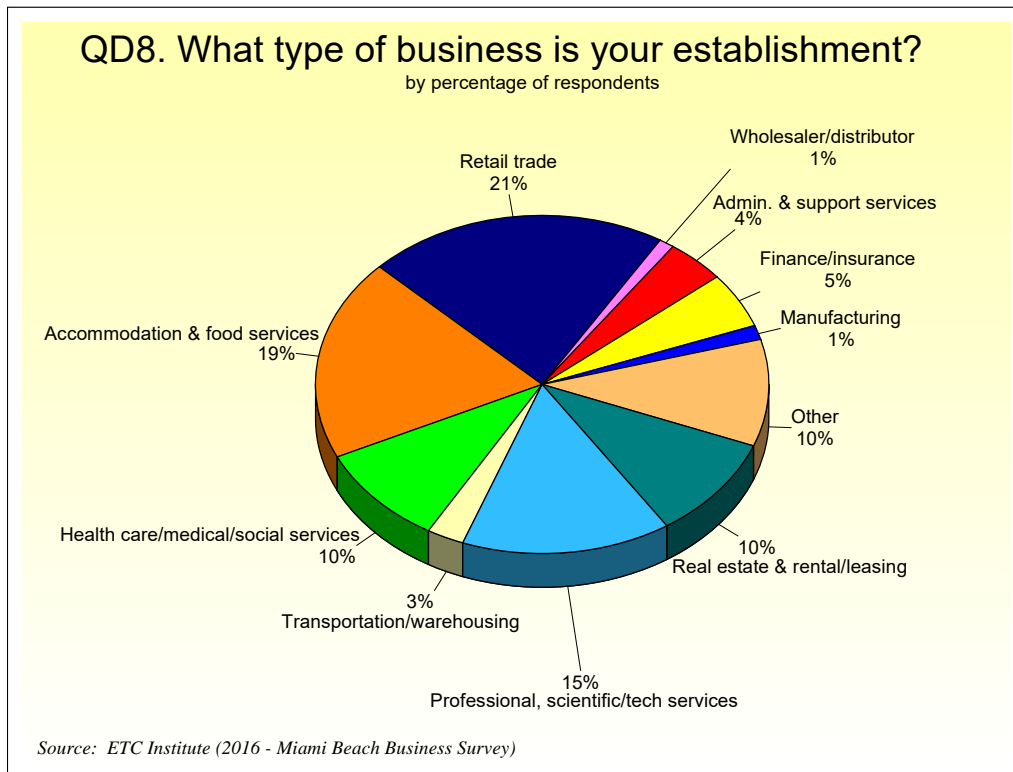by percentage of businesses

One
81%

Not provided
2%

Three or more
9%

Two
8%
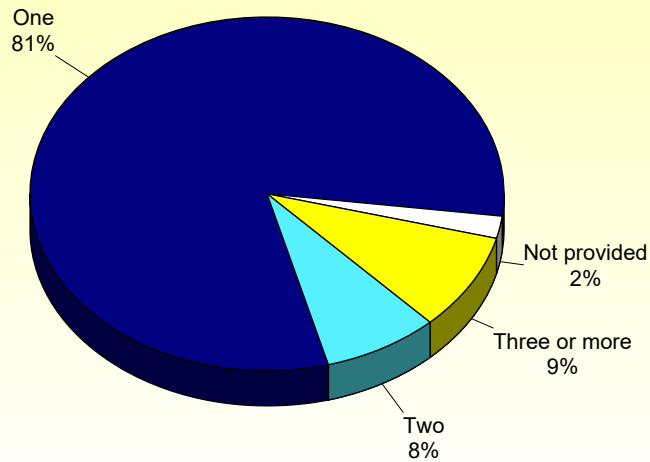
Source: ETC Institute (2016 - Miami Beach Business Survey)

QD7. How many locations do you have <u>outside</u> the City of Miami Beach?
by percentage of businesses

None
60%

Not provided
14%

One
14%

Two
2%

Three or more
10%

Source: ETC Institute (2016 - Miami Beach Business Survey)

QD8. What type of business is your establishment?
by percentage of respondents

Retail trade
21%

Wholesaler/distributor
1%

Admin. & support services
4%

Finance/insurance
5%

Manufacturing
1%

Other
10%

Real estate & rental/leasing
10%

Professional, scientific/tech services
15%

Transportation/warehousing
3%

Health care/medical/social services
10%

Accommodation & food services
19%
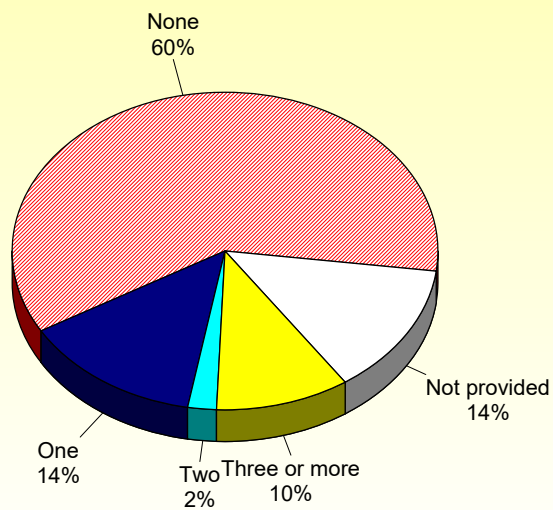
Source: ETC Institute (2016 - Miami Beach Business Survey)

Section 2-2:
Business Survey
Overall Trends

Overall Ratings for the City of Miami Beach 2009 to 2016
by percentage of businesses that rated the item as "excellent" or "good" (excluding "don't know")
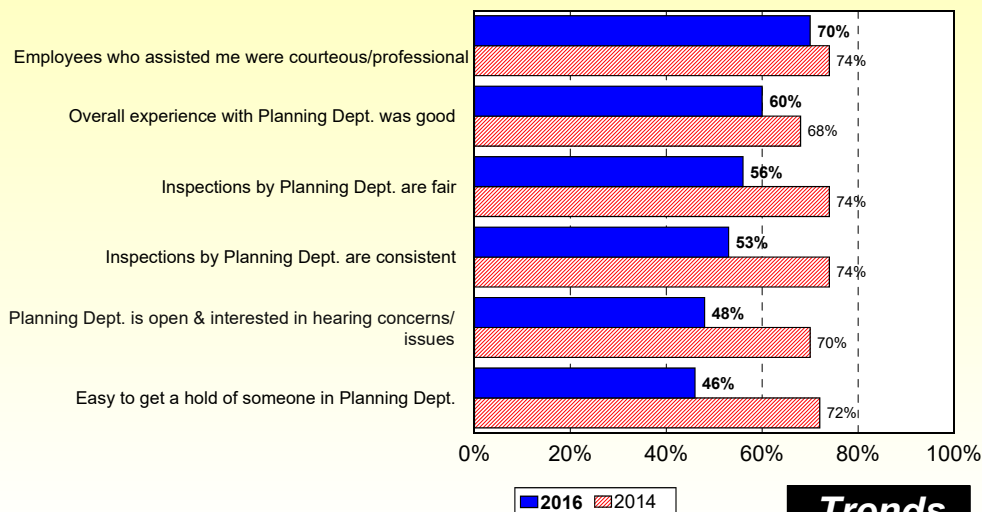
Fire services
- 95%
- 93%
- 93%
- 95%

Emergency medical services
- 91%
- 92%
- 93%
- 93%

Ocean rescue/lifeguard/beach patrol
- 90%
- 89%
- 88%
- 95%

City's emergency/hurricane preparedness
- 88%
- 88%
- 86%
- 91%

Maintenance of parks
- 87%
- 83%
- 86%
- 85%

Appearance/maintenance of City's public bldgs
- 87%
- 79%
- 83%
- 85%

Overall quality of the beaches
- 82%
- 82%
- 86%
- 85%

Landscape maintenance in right of way
- 80%
- 74%
- 80%
- 81%

■ 2016 ▨ 2014 ■ 2012 □ 2009
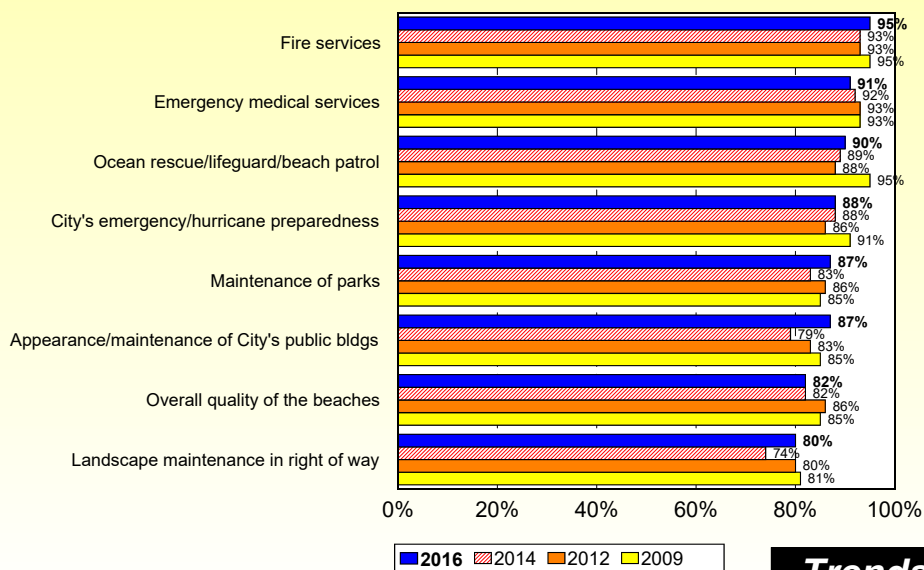
Source: ETC Institute (2016 - Miami Beach Business Survey)

Trends

Overall Ratings for the City of Miami Beach 2009 to 2016
by percentage of businesses that rated the item as "excellent" or "good" (excluding "don't know")

Police services
- 79%
- 77%
- 71%
- 81%

Garbage/trash collection
- 71%
- 72%
- 71%
- 75%

Cleanliness of streets near your business
- 68%
- 63%
- 62%
- 66%

Condition of sidewalks (few or no cracks)
- 62%
- 61%
- 64%
- 66%

Cleanliness of canals/waterways
- 57%
- 59%
- 59%
- 61%

City's efforts to manage stormwater
- 54%
- 31%
- 37%
- 45%

Condition of City roads in Miami Beach
- 51%
- 36%
- 40%
- 48%

The job City is doing to address homelessness
- 35%
- 39%
- 31%
- 32%

■ 2016 ▨ 2014 ■ 2012 □ 2009
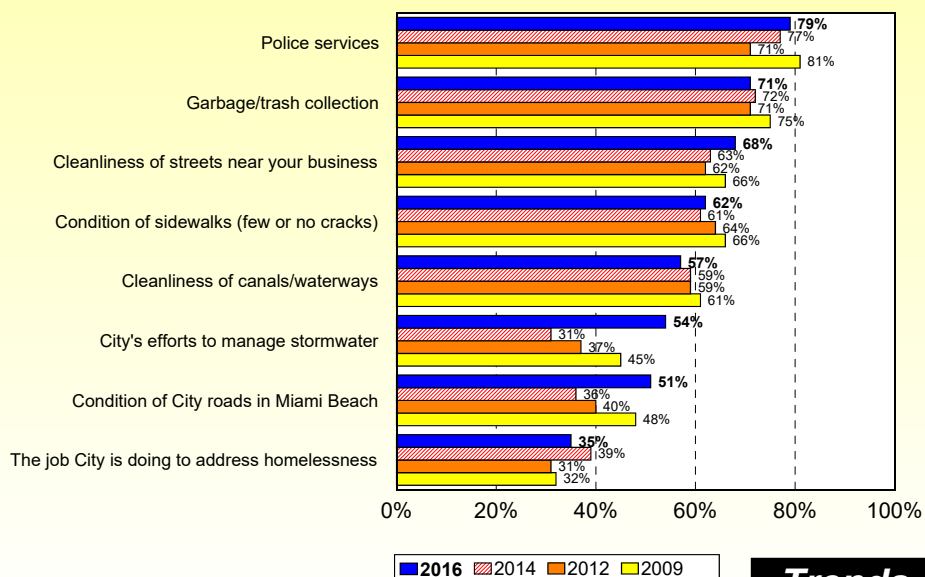
Source: ETC Institute (2016 - Miami Beach Business Survey)
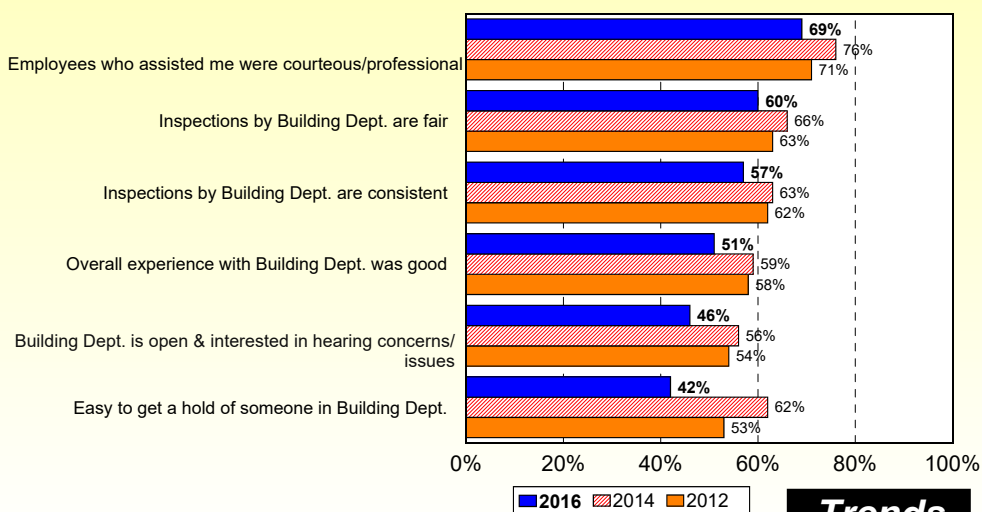
Trends

Level of Agreement With the Following Statements Regarding the Planning Department 2014 vs. 2016

by percentage of businesses that have been in contact with the Planning Department during the past 3 years and "strongly agreed" or "agreed" with the statement (excluding "don't know")
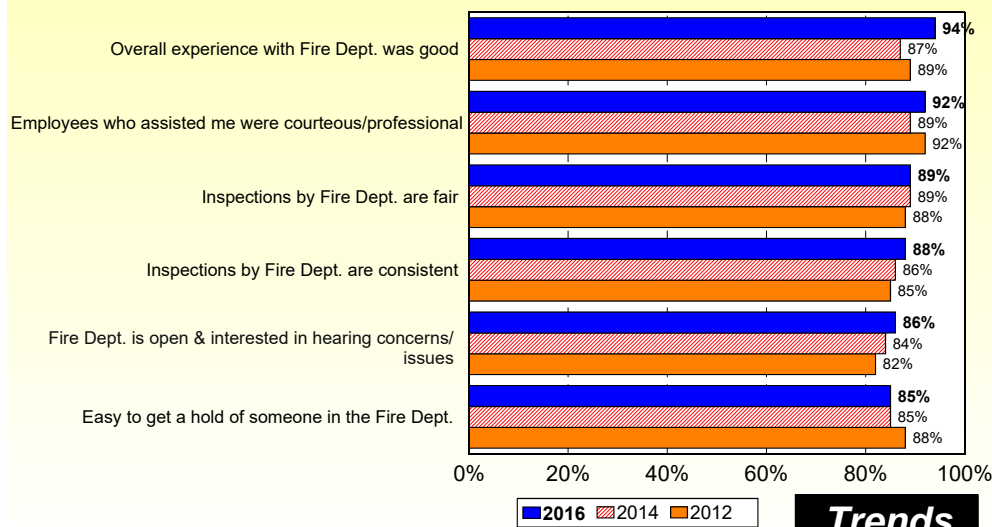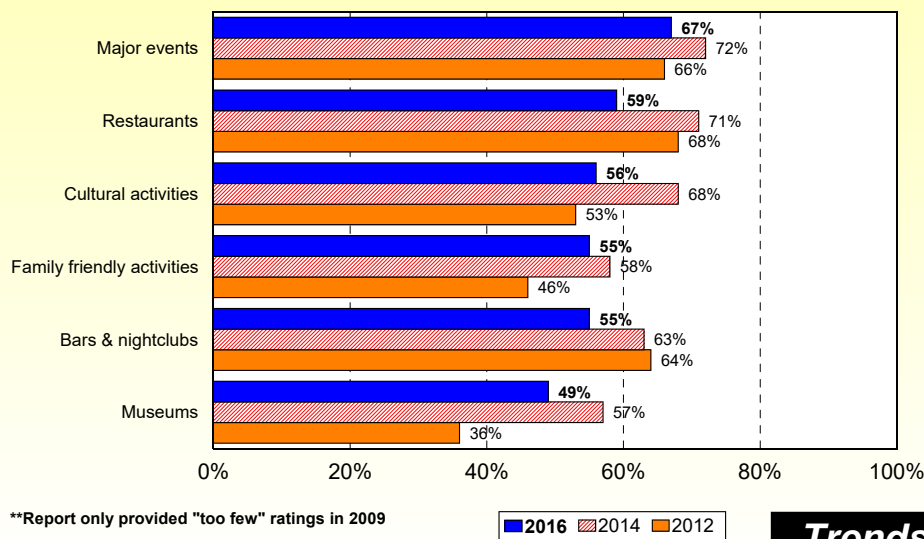
Statement	2016	2014
Employees who assisted me were courteous/professional	70%	74%
Overall experience with Planning Dept. was good	60%	68%
Inspections by Planning Dept. are fair	56%	74%
Inspections by Planning Dept. are consistent	53%	74%
Planning Dept. is open & interested in hearing concerns/issues	48%	70%
Easy to get a hold of someone in Planning Dept.	46%	72%

Trends

Source: ETC Institute (2016 - Miami Beach Business Survey)

Level of Agreement With the Following Statements Regarding the Building Department 2012 to 2016

by percentage of businesses that have been in contact with the Building Department during the past 3 years and "strongly agreed" or "agreed" with the statement (excluding "don't know")

Statement	2016	2014	2012
Employees who assisted me were courteous/professional	69%	76%	71%
Inspections by Building Dept. are fair	60%	66%	63%
Inspections by Building Dept. are consistent	57%	63%	62%
Overall experience with Building Dept. was good	51%	59%	58%
Building Dept. is open & interested in hearing concerns/issues	46%	56%	54%
Easy to get a hold of someone in Building Dept.	42%	62%	53%

Trends

Source: ETC Institute (2016 - Miami Beach Business Survey)

Level of Agreement With the Following Statements Regarding the Fire Department 2012 to 2016

by percentage of businesses that have been in contact with the Fire Department during the past 3 years and "strongly agreed" or "agreed" with the statement (excluding "don't know")

Statement	2016	2014	2012
Overall experience with Fire Dept. was good	94%	87%	89%
Employees who assisted me were courteous/professional	92%	89%	92%
Inspections by Fire Dept. are fair	89%	89%	88%
Inspections by Fire Dept. are consistent	88%	86%	85%
Fire Dept. is open & interested in hearing concerns/ issues	86%	84%	82%
Easy to get a hold of someone in the Fire Dept.	85%	85%	88%

2016 / 2014 / 2012

Trends

Source: ETC Institute (2016 - Miami Beach Business Survey)

How Businesses Feel About the Number of the Following Amenities in the City of Miami Beach 2012 to 2016

by percentage of businesses that felt the amount was "about right" (excluding "don't know")

Amenity	2016	2014	2012
Major events	67%	72%	66%
Restaurants	59%	71%	68%
Cultural activities	56%	68%	53%
Family friendly activities	55%	58%	46%
Bars & nightclubs	55%	63%	64%
Museums	49%	57%	36%

**Report only provided "too few" ratings in 2009

2016 / 2014 / 2012

Trends

Source: ETC Institute (2016 - Miami Beach Business Survey)

Effect of Miami Beach Convention Center on Business 2014 vs. 2016
by percentage of businesses that felt the Convention Center "adds to the success" of the business
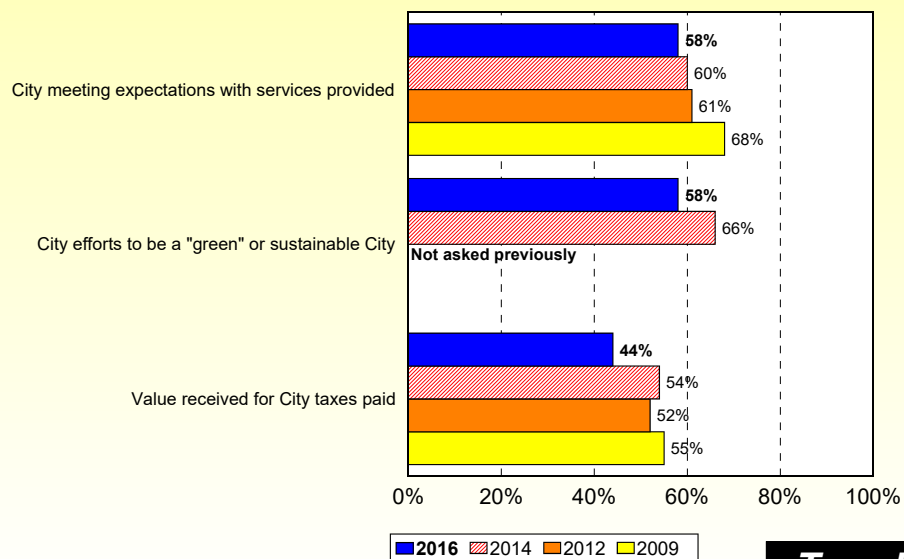(excluding "don't know")
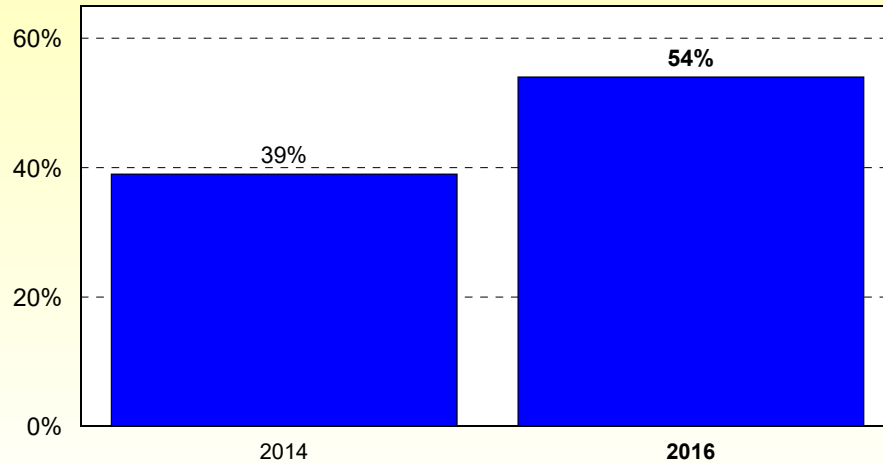
Source: ETC Institute (2016 - Miami Beach Business Survey)

Trends

Effect of Miami Beach Tourism Industry on Business 2009 to 2016
by percentage of businesses that felt the Convention Center "adds to the success" of the business
(excluding "don't know")

Source: ETC Institute (2016 - Miami Beach Business Survey)

Trends

Feeling of Safety in Miami Beach
2009 to 2016
by percentage of businesses that felt "very safe," "safe" or "somewhat safe" (excluding "don't know")

In/around place of business during daytime
- 94%
- 93%
- 95%
- 96%

In/around place of business during evening/night
- 80%
- 82%
- 82%
- 80%

0%   20%   40%   60%   80%   100%

■ 2016 ▨ 2014 ■ 2012 ▢ 2009

Source: ETC Institute (2016 - Miami Beach Business Survey)

Trends

Perceived Amount of Street Lighting Near Business
2009 to 2016
by percentage of businesses that felt the amount was "about right" (excluding "don't know")

2009	2012	2014	2016
75%	68%	72%	69%

Source: ETC Institute (2016 - Miami Beach Business Survey)
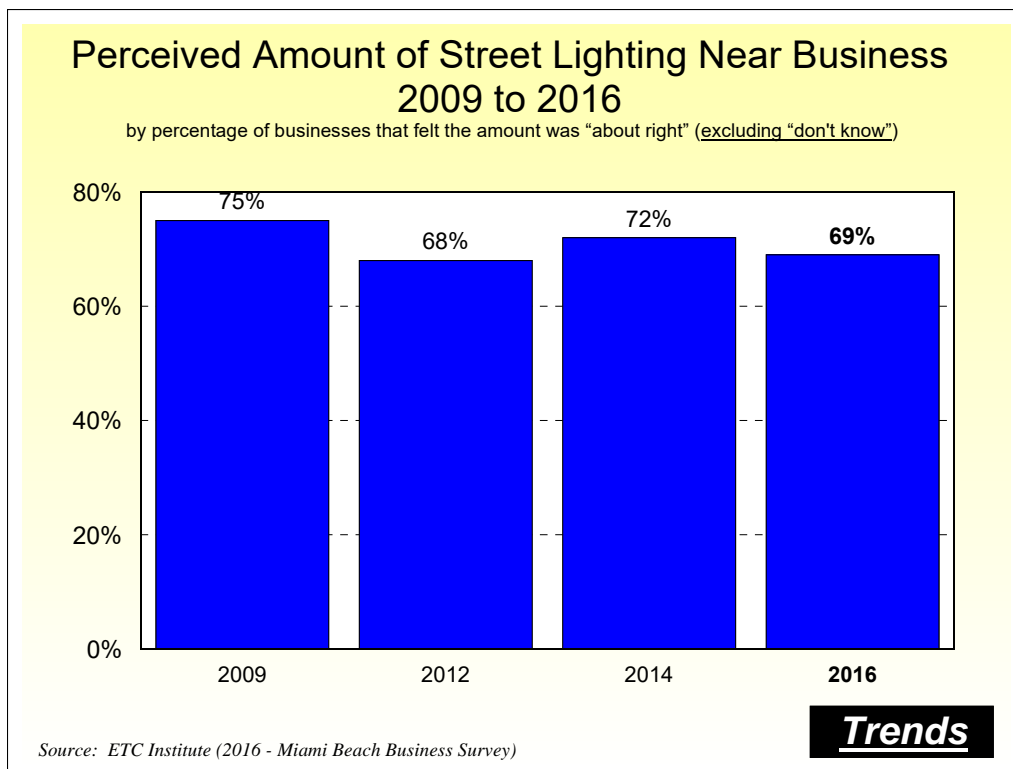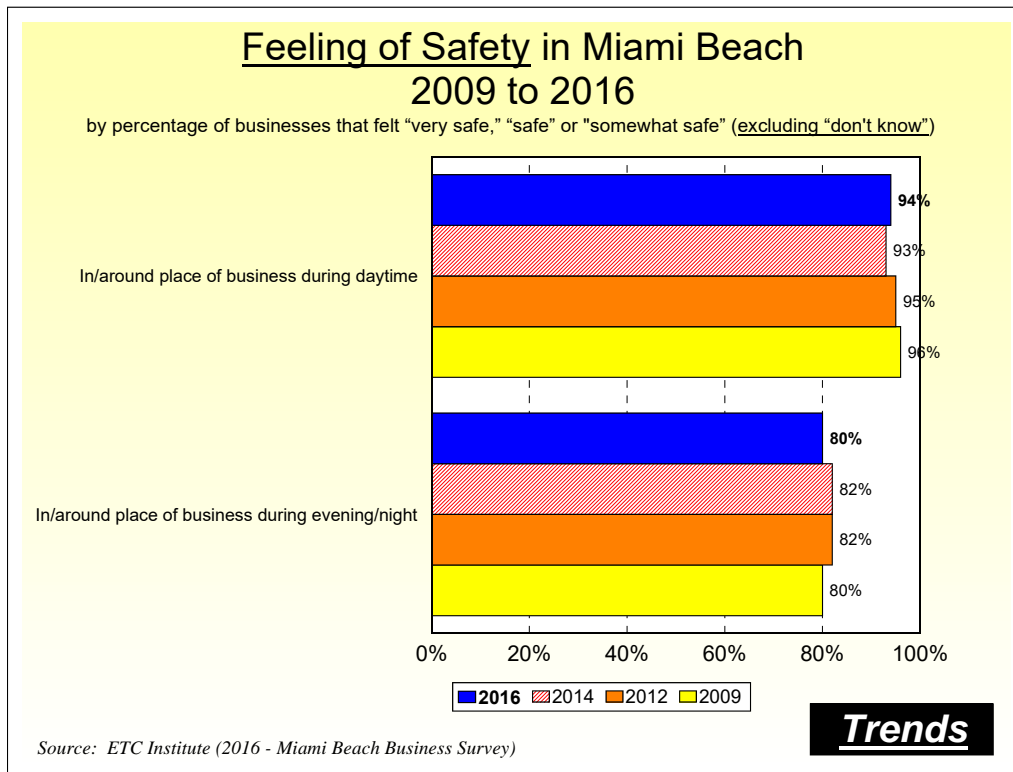
Trends

Satisfaction With Various <u>Perceptions</u> of the City 2009 to 2016

by percentage of businesses that were "very satisfied" or "satisfied" (<u>excluding "don't know"</u>)

City meeting expectations with services provided
- **58%** (2016)
- 60% (2014)
- 61% (2012)
- 68% (2009)

City efforts to be a "green" or sustainable City
- **58%** (2016)
- 66% (2014)
- **Not asked previously**

Value received for City taxes paid
- **44%** (2016)
- 54% (2014)
- 52% (2012)
- 55% (2009)

Legend: ■ **2016** ▨ 2014 ■ 2012 ■ 2009

Source: ETC Institute (2016 - Miami Beach Business Survey)

Trends

Perceived Level of <u>Code Enforcement and Ordinance</u> Near Business - 2009 to 2016

by percentage of businesses that rated the level "about right" (<u>excluding "don't know"</u>)

- 2009: 68%
- 2012: 61%
- 2014: 69%
- **2016: 59%**
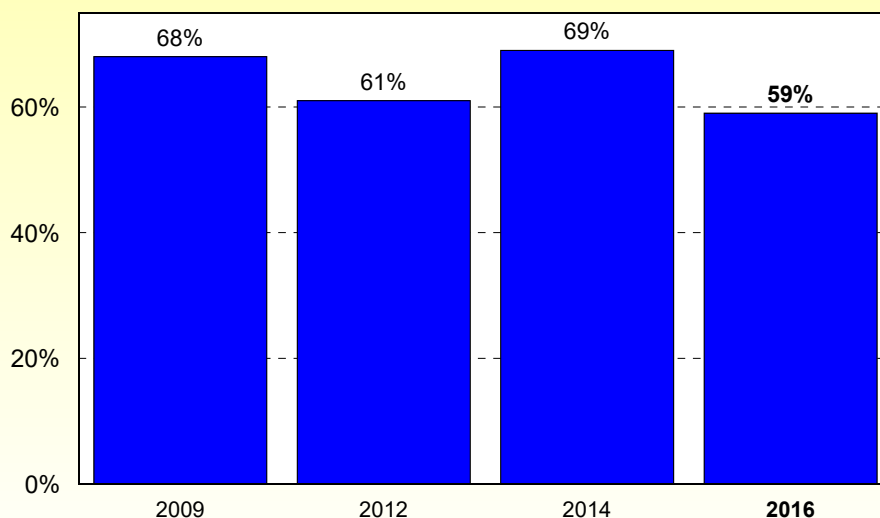
Source: ETC Institute (2016 - Miami Beach Business Survey)

Trends

Support for Spending Tax Dollars to Address Rising Sea Levels - 2014 vs. 2016
by percentage of businesses that support the issue (excluding "don't know")

87% 2014

89% **2016**
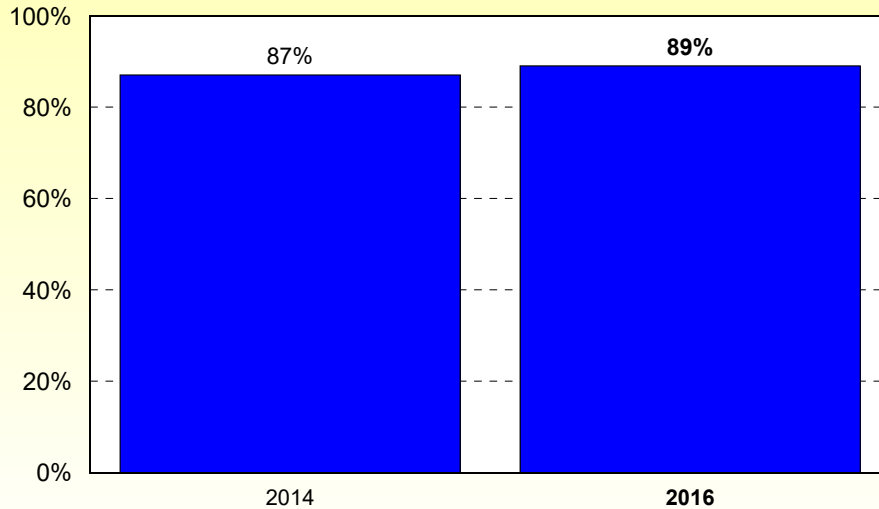
Trends

Source: ETC Institute (2016 - Miami Beach Business Survey)

What Businesses Think About Historic Preservation Efforts in the City of Miami Beach - 2009 to 2016
by percentage of businesses that rated the efforts "very effective" or "somewhat effective"
(excluding "don't know")

77% 2009

82% 2012

77% 2014

63% **2016**

Trends

Source: ETC Institute (2016 - Miami Beach Business Survey)

Overall Effectiveness of Public Transit in Bringing Employees to the City of Miami Beach - 2009 to 2016
by percentage of businesses that responded "excellent" or "good" (excluding "don't know")

64% (2009), 56% (2012), 53% (2014), **43%** (2016)

Source: ETC Institute (2016 - Miami Beach Business Survey)

Trends

Perceived Availability of Public and Private Parking for Customers - 2009 to 2016
by percentage of businesses that responded that there are "almost always" or "often" parking spaces nearby (excluding "don't know")

28% (2009), 40% (2012), 31% (2014), **33%** (2016)

Source: ETC Institute (2016 - Miami Beach Business Survey)

Trends

Usefulness of Information the City of Miami Beach Sends About City Programs, Activities, Policies and Events 2012 to 2016

by percentage of businesses that felt it was "very useful" or "somewhat useful"
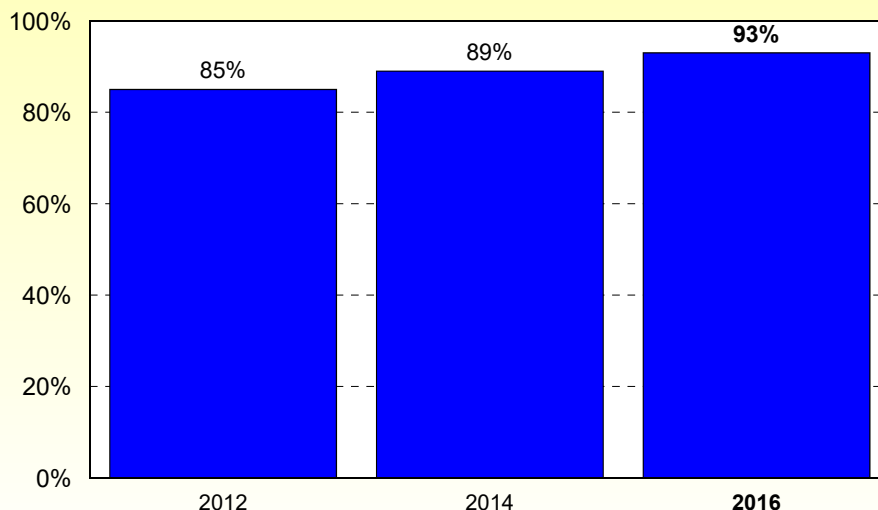
Source: ETC Institute (2016 - Miami Beach Business Survey)

Trends

Agreement With Various Statements About Most Recent Interaction With City Employees - 2009 to 2016

by percentage of businesses that contacted the City during the last 12 months and "strongly agreed" or "agreed" with the statement (excluding "don't know")
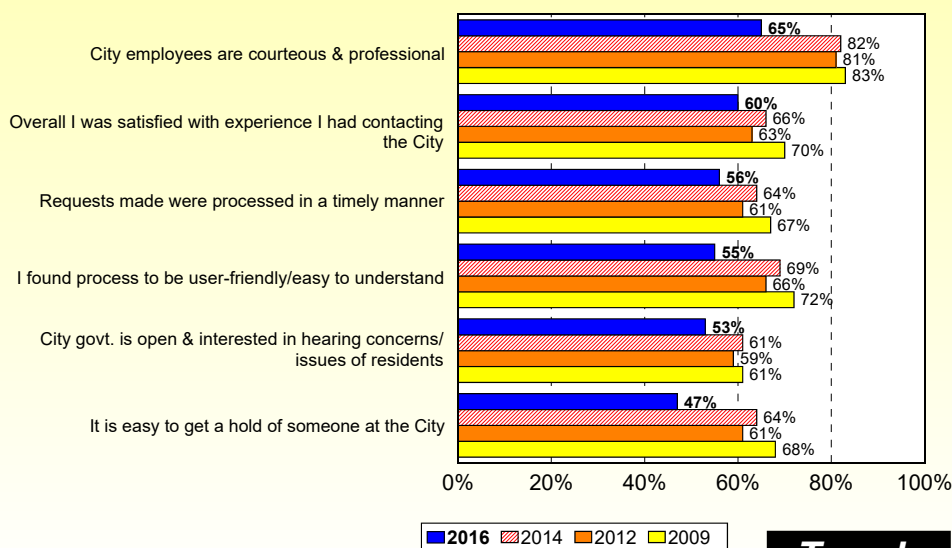
Source: ETC Institute (2016 - Miami Beach Business Survey)

Trends

How Businesses Rate the City of Miami Beach as a Place to do Business Compared to Previous Years 2009 to 2016

by percentage of businesses that indicated it has "gotten better" (excluding "don't know")
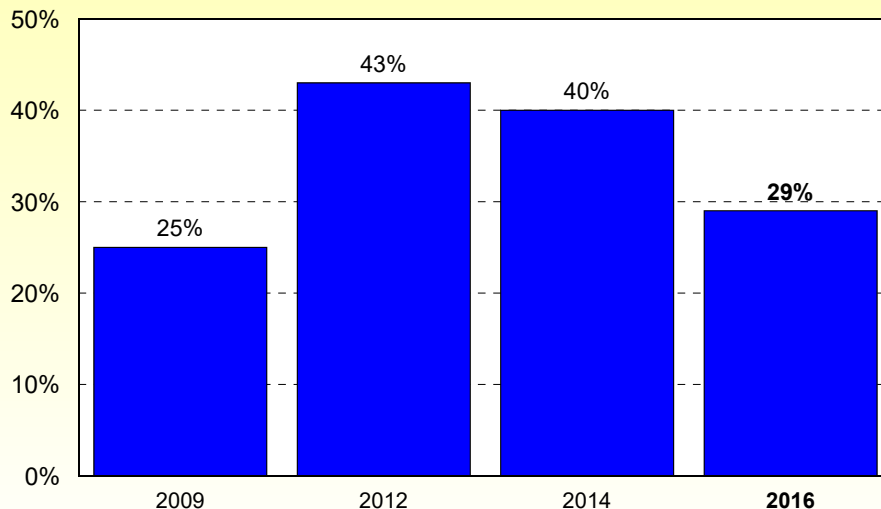
Source: ETC Institute (2016 - Miami Beach Business Survey)

Trends

Likelihood of Recommending the City of Miami Beach to Others as a Place to Run a Business - 2009 to 2016

by percentage of businesses that responded "definitely recommend" or "probably recommend" (excluding "don't know")
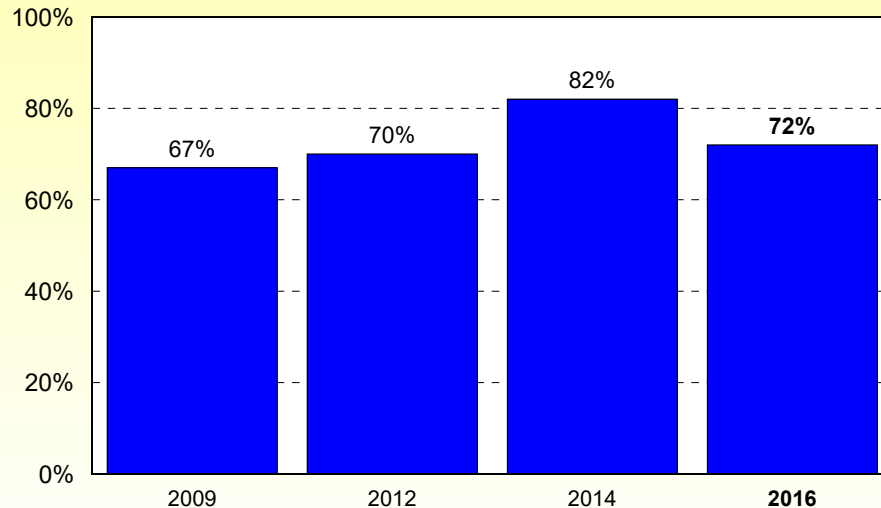
Source: ETC Institute (2016 - Miami Beach Business Survey)

Trends

Section 2-3:
Business Survey Importance-Satisfaction Priorities Analysis

Importance-Satisfaction Analysis
Miami Beach, Florida

Overview

Today, city officials have limited resources which need to be targeted to activities that are of the most benefit to their citizens. Two of the most important criteria for decision making are (1) to target resources toward services of the highest importance to citizens; and (2) to target resources toward those services where citizens are the least satisfied.

The Importance-Satisfaction (IS) rating is a unique tool that allows public officials to better understand both of these highly important decision making criteria for each of the services they are providing. The Importance-Satisfaction rating is based on the concept that cities will maximize overall citizen satisfaction by emphasizing improvements in those service categories where the level of satisfaction is relatively low and the perceived importance of the service is relatively high.

Methodology

The rating is calculated by summing the percentage of responses for items selected as the first, second, third, fourth, and fifth most important services for the City to provide. This sum is then multiplied by 1 minus the percentage of respondents that indicated they were positively satisfied with the City's performance in the related area (the sum of the ratings of 3 and 4 on a 4-point scale excluding "don't know" responses). "Don't know" responses are excluded from the calculation to ensure that the satisfaction ratings among service categories are comparable. [IS=Importance x (1-Satisfaction)].

Example of the Calculation. Respondents were asked to identify the major City services they thought were the most important for the City to provide. Approximately twenty-four percent (23.9%) selected "City efforts to manage stormwater" as one of the most important major services for the City to provide.

With regard to satisfaction, 54% of the businesses surveyed rated their overall satisfaction with "City efforts to manage stormwater" as a "3" or a "4" on a 4-point scale (where "4" means "excellent").   The I-S rating for "City efforts to manage stormwater" was calculated by multiplying the sum of the most important percentages by 1 minus the sum of the satisfaction percentages. In this example, 23.9% was multiplied by 46% (1-0.54). This calculation yielded an I-S rating of 0.1099, which ranked fourth out of nineteen major City services.

The maximum rating is 1.00 and would be achieved when 100% of the respondents select an item as one of their top three choices to emphasize over the next two years and 0% indicate that they are positively satisfied with the delivery of the service.

The lowest rating is 0.00 and could be achieved under either one of the following two situations:

- if 100% of the respondents were positively satisfied with the delivery of the service

- if none (0%) of the respondents selected the service as one of the three most important areas for the City to emphasize over the next two years.

Interpreting the Ratings

Ratings that are greater than or equal to 0.20 identify areas that should receive significantly more emphasis over the next two years. Ratings from .10 to .20 identify service areas that should receive increased emphasis. Ratings less than .10 should continue to receive the current level of emphasis.

- Definitely Increase Emphasis (IS>=0.20)

- Increase Current Emphasis (0.10<=IS<0.20)

- Maintain Current Emphasis (IS<0.10)

The result for the City of Miami Beach is provided on the following page.

Importance-Satisfaction Analysis

Importance-Satisfaction Rating
City of Miami Beach Business Survey
<u>OVERALL</u>

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS .10-.20)						
The job City is doing to address homelessness	30%	4	35%	19	0.1944	1
Condition of City roads in Miami Beach	28%	5	51%	18	0.1392	2
Cleanliness of streets near your business	34%	2	68%	13	0.1101	3
City's efforts to manage stormwater	24%	7	54%	17	0.1099	4
Medium Priority (IS <.10)						
Police services	47%	1	79%	9	0.0995	5
Condition of sidewalks (few or no cracks)	16%	10	62%	15	0.0593	6
Cleanliness of canals/waterways	12%	14	57%	16	0.0499	7
Cleanliness of streets in business/commercial areas	20%	9	75%	10	0.0495	8
City efforts to keep businesses informed	14%	11	65%	14	0.0476	9
Overall quality of the beaches	22%	8	82%	7	0.0394	10
Garbage/trash collection	13%	12	71%	12	0.0368	11
Overall quality of customer service	12%	13	71%	11	0.0345	12
Emergency medical services	33%	3	91%	2	0.0293	13
Fire services	25%	6	95%	1	0.0123	14
Landscape maintenance in right of way	6%	17	80%	8	0.0114	15
Maintenance of parks	8%	15	87%	5	0.0107	16
City's emergency/hurricane preparedness	7%	16	88%	4	0.0088	17
Ocean rescue/lifeguard/beach patrol	5%	18	90%	3	0.0049	18
Appearance/maintenance of City's public bldgs	3%	19	87%	6	0.0035	19

Note: The I-S Rating is calculated by multiplying the "Most Important" % by (1-'Satisfaction' %)

Most Important %:   The "Most Important" percentage represents the sum of the first, second, third
fourth and fifth most important responses for each item. Respondents were asked
to identify the items they thought were most important for the City to provide.

Satisfaction %:   The rating percentage represents the sum of the ratings "3" and "4" excluding 'don't knows.'
Respondents ranked their level of satisfaction with the each of the items on a scale
of 1 to 4 with "4" being "excellent" and "1" being "poor."

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Importance-Satisfaction Analysis *(vertical side text)*

Importance-Satisfaction Matrix Analysis

The Importance-Satisfaction rating is based on the concept that public agencies will maximize overall customer satisfaction by emphasizing improvements in those areas where the level of satisfaction is relatively low and the perceived importance of the service is relatively high. ETC Institute developed an Importance-Satisfaction Matrix to display the perceived importance of major services that were assessed on the survey against the perceived quality of service delivery. The two axes on the matrix represent Satisfaction (vertical) and relative Importance (horizontal).

The I-S (Importance-Satisfaction) matrix should be interpreted as follows.

- **Continued Emphasis (above average importance and above average satisfaction).** This area shows where the City is meeting customer expectations. Items in this area have a significant impact on the customer's overall level of satisfaction. The City should maintain (or slightly increase) emphasis on items in this area.

- **Exceeding Expectations (below average importance and above average satisfaction).**   This area shows where the City is performing significantly better than customers expect the City to perform. Items in this area do not significantly affect the overall level of satisfaction that businesses have with City services. The City should maintain (or slightly decrease) emphasis on items in this area.

- **Opportunities for Improvement (above average importance and below average satisfaction).**   This area shows where the City is not performing as well as businesses expect the City to perform. This area has a significant impact on customer satisfaction, and the City should DEFINITELY increase emphasis on items in this area.

- **Less Important (below average importance and below average satisfaction).** This area shows where the City is not performing well relative to the City's performance in other areas; however, this area is generally considered to be less important to businesses. This area does not significantly affect overall satisfaction with City services because the items are less important to businesses. The agency should maintain current levels of emphasis on items in this area.
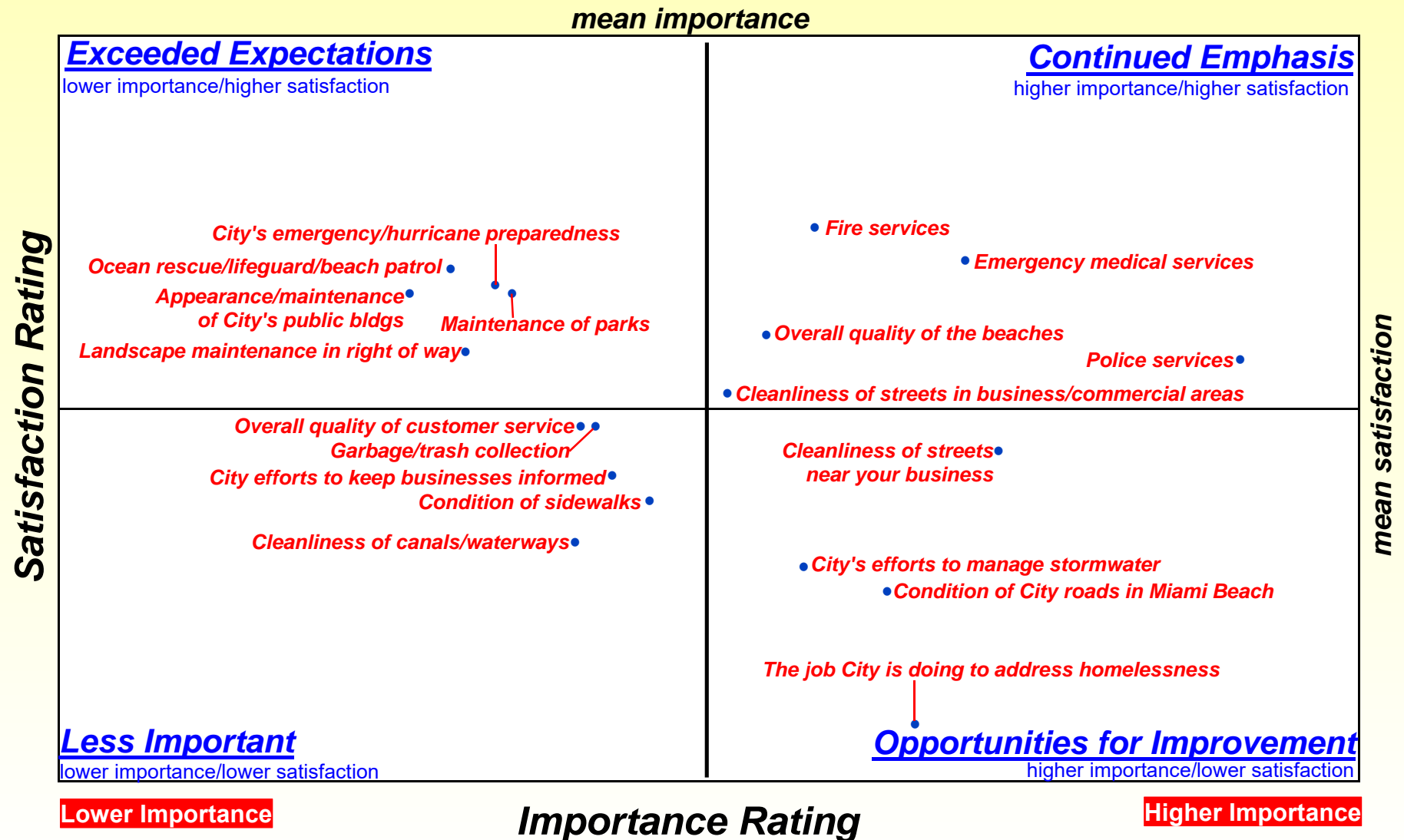
A matrix showing the results for the City of Miami Beach is provided on the following page.

City of Miami Beach 2016 Business Survey
Importance-Satisfaction Assessment Matrix
-Overall City Services-

(points on the graph show deviations from the mean importance and satisfaction ratings given by respondents to the survey)

mean importance

Exceeded Expectations
lower importance/higher satisfaction

Continued Emphasis
higher importance/higher satisfaction

Satisfaction Rating

City's emergency/hurricane preparedness

Ocean rescue/lifeguard/beach patrol •

Appearance/maintenance
of City's public bldgs •

Maintenance of parks

Landscape maintenance in right of way •

• Fire services

• Emergency medical services

• Overall quality of the beaches

Police services •

• Cleanliness of streets in business/commercial areas

Overall quality of customer service • •
Garbage/trash collection •
City efforts to keep businesses informed •
Condition of sidewalks •

Cleanliness of canals/waterways •

Cleanliness of streets•
near your business

• City's efforts to manage stormwater
•Condition of City roads in Miami Beach

The job City is doing to address homelessness

Less Important
lower importance/lower satisfaction

Opportunities for Improvement
higher importance/lower satisfaction

mean satisfaction

Lower Importance

Importance Rating

Higher Importance

Source: ETC Institute (2016)

Section 2-4:
Business Survey Instrument

MIAMIBEACH

City of Miami Beach, 1700 Convention Center Drive, Miami Beach, Florida 33139, www.miamibeachfl.gov

Jimmy L. Morales, City Manager
Tel: 305-673-7010 , Fax: 305-673-7782

May 23, 2016

Dear Business Owners:

The City of Miami Beach is committed to providing excellent public service and safety to all who live, work, and play in our vibrant, tropical, historic community.

A significant driver in developing citywide priorities is the community input received through the Community Satisfaction Surveys with residents and business owners. These surveys provide an understanding of current satisfaction levels within City of Miami Beach government and the services it delivers; provides benchmarks to similar jurisdictions; and offers recommendations for improving satisfaction and quality of life.

Please take a few moments to complete the 2016 survey. Your participation is vital to the success of this effort, and your responses will remain anonymous. A postage-paid return envelope has been provided for your convenience, or you may complete the survey online at www.MBSurvey.org

Your input will help reveal where we are exceeding expectations, as well as identify areas where improvements are needed to ensure our City moves strategically and innovatively into the future. Since 2005, the City of Miami Beach has conducted five Community Satisfaction Surveys where citizens and businesses have had an opportunity to express their opinions. These survey results are instrumental in driving strategic decisions that affect how City resources are allocated.

We have made significant progress on many of the priorities identified in the last survey administered in 2014. I encourage you to visit our website at http://web.miamibeachfl.gov/excellence to learn more about our Excellence Model and the impact your input has.

 As a City, it is our job to provide the public services you need and desire. We need your input in order to improve.

Survey results will be shared with the community once they have been compiled citywide. If you have any questions, please contact ctatham@etcinstitute.com or at 913-254-4512.

We continually strive to deliver outstanding, enhanced services to our residents, businesses and visitors while increasing value for the tax dollars paid. Thank you for your help on this collaborative effort to ensure Miami Beach remains a world-class City.

Sincerely,

Jimmy L. Morales
City Manager

We are committed to providing excellent public service and safety to all who live, work, and play in our vibrant, tropical, historic community.

MIAMIBEACH   City of Miami Beach 2016 Business Survey

Please take few minutes to complete this important survey. Your input will help the City of Miami Beach serve the needs of businesses better. When you are finished, please return your completed survey in the postage-paid envelope provided. You may also complete the survey online at *www.MBSurvey.org*. Thank You!

---

1. **SATISFACTION WITH CITY SERVICES.** **City services provided by the City of Miami Beach are listed below. Please rate each service by circling the number to the right that corresponds to your rating.**

	Please rate the following city services:	Excellent	Good	Fair	Poor	Don't Know
01.	Cleanliness of streets near your business	4	3	2	1	9
02.	Cleanliness of streets in business/commercial areas	4	3	2	1	9
03.	Cleanliness of canals/waterways	4	3	2	1	9
04.	Condition of sidewalks *(few or no cracks)*	4	3	2	1	9
05.	Appearance and maintenance of the City's public buildings	4	3	2	1	9
06.	Overall quality of the beaches *(cleanliness & water quality)*	4	3	2	1	9
07.	Maintenance of parks *(e.g. cleanliness, landscape maintenance)*	4	3	2	1	9
08.	Landscape maintenance in right of way of city streets/public areas	4	3	2	1	9
09.	Garbage/trash collection	4	3	2	1	9
10.	The job the City is doing to address homelessness	4	3	2	1	9
11.	Police services	4	3	2	1	9
12.	Emergency medical services	4	3	2	1	9
13.	Fire services	4	3	2	1	9
14.	Ocean rescue/lifeguard/beach patrol services	4	3	2	1	9
15.	City's emergency/hurricane preparedness efforts	4	3	2	1	9
16.	City's efforts to manage stormwater drainage and flooding	4	3	2	1	9
17.	Condition of City roads in Miami Beach *(street repair maintenance and smoothness)*	4	3	2	1	9
18.	Overall quality of customer service provided by the city	4	3	2	1	9
19.	City efforts to keep businesses informed	4	3	2	1	9

2. **Which FIVE of the city services listed above do you think are most important for the City to provide?** *[Write-in your answers below using the numbers from the list in Question 1.]*

    1st: ____   2nd: ____   3rd: ____   4th: ____   5th: ____

3. **During the past 12 months, how many times has your establishment been inspected?** *(e.g. for site plans, license, solicitation, signage, sanitation, property maintenance, zoning, noise, etc.)*

    _____ times *[If you have not been inspected, skip to Question 4.]*

    3-2.   How satisfied are you with the consistency and fairness of City inspections?

    ___(5) Very satisfied   ___(3) Neither satisfied nor dissatisfied   ___(1) Very dissatisfied
    ___(4) Satisfied   ___(2) Dissatisfied   ___(9) Don't know

4. **PLANNING DEPARTMENT.** **During the past 3 years, how many times have you contacted or had any direct experience with the Miami Beach Planning Department?**

    _____ times *[If you have not been inspected, skip to Question 5.]*

4-2. **Please rate your agreement with the following statements using a scale of 1 to 5, where 5 means "Strongly Agree" and 1 means "Strongly Disagree" based on your experience interacting with the Planning Department over the past three years.**

	Please rate your level of agreement with the following statements:	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know
1.	It was easy to get a hold of someone who could help you in the Planning Department	5	4	3	2	1	9
2.	The employees who assisted me were courteous and professional	5	4	3	2	1	9
3.	Planning Department employees have had the proper training	5	4	3	2	1	9
4.	Planning Department employees possess the proper knowledge	5	4	3	2	1	9
5.	The overall experience I had with the City Planning Department was good	5	4	3	2	1	9
6.	The inspections by the Planning Department are consistent from one inspection to the next	5	4	3	2	1	9
7.	The inspections by the Planning Department are fair	5	4	3	2	1	9
8.	The Planning Department is open and interested in hearing the concerns or issues of businesses	5	4	3	2	1	9

5. **BUILDING DEPARTMENT. During the past 3 years how many times have you contacted or had any direct experience with the Miami Beach Building Department?**

_____ times *[If you have not been inspected, skip to Question 6.]*

5-2. **Please rate your agreement with the following statements using a scale of 1 to 5, where 5 means "Strongly Agree" and 1 means "Strongly Disagree" based on your experience interacting with the Building Department over the past three years.**

	Please rate your level of agreement with the following statements:	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know
01.	It was easy to get a hold of someone who could help you in the Building Department	5	4	3	2	1	9
02.	I was served in a timely manner	5	4	3	2	1	9
03.	I am satisfied with the level of service I received during my last permit application process with the Building Department	5	4	3	2	1	9
04.	The employees who assisted me were courteous and professional	5	4	3	2	1	9
05.	Building Department employees have had the proper training	5	4	3	2	1	9
06.	Building Department employees possess the proper knowledge	5	4	3	2	1	9
07.	The overall experience I had with the City Building Department was good	5	4	3	2	1	9
08.	The inspections by the Building Department are consistent from one inspection to the next	5	4	3	2	1	9
09.	The inspections by the Building Department are fair	5	4	3	2	1	9
10.	The Building Department is open and interested in hearing the concerns or issues of businesses	5	4	3	2	1	9

6. **FIRE DEPARTMENT. During the past 3 years how many times have you contacted or had any direct experience with the Miami Beach Fire Department?**

_____ times *[If you have not been inspected, skip to Question 7.]*

6-2. **Please rate your agreement with the following statements using a scale of 1 to 5, where 5 means "Strongly Agree" and 1 means "Strongly Disagree" based on your experience interacting with the Fire Department over the past three years.**

	Please rate your level of agreement with the following statements:	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know
1.	It was easy to get a hold of someone who could help you in the Fire Department	5	4	3	2	1	9
2.	The employees who assisted me were courteous and professional	5	4	3	2	1	9
3.	Fire Department employees have had the proper training	5	4	3	2	1	9
4.	Fire Department employees possess the proper knowledge	5	4	3	2	1	9
5.	The overall experience I had with the City Fire Department was good	5	4	3	2	1	9
6.	The inspections by the Fire Department are consistent from one inspection to the next	5	4	3	2	1	9
7.	The inspections by the Fire Department are fair	5	4	3	2	1	9
8.	The Fire Department is open and interested in hearing the concerns or issues of businesses	5	4	3	2	1	9

7. **CULTURE AND TOURISM NEEDS. Please indicate how you feel about the number of following amenities in the City of Miami Beach by circling the corresponding number below.**

	How do you feel about the number of the following in Miami Beach:	Way Too Many	Too Many	About Right	Too Few	Way Too Few	Don't Know
1.	Museums	5	4	3	2	1	9
2.	Cultural activities *(such as art shows, film festivals, musicals, and live performances)*	5	4	3	2	1	9
3.	Family friendly activities *(such as movies in the park, music in the park, etc.)*	5	4	3	2	1	9
4.	Major events *(such as boat/home/auto shows, 4th of July celebrations, expositions, food and wine festivals, etc.)*	5	4	3	2	1	9
5.	Restaurants	5	4	3	2	1	9
6.	Bars and nightclubs	5	4	3	2	1	9

8. **Do you think the Miami Beach Convention Center adds to the success of your business?**

____(1) Yes ____(2) No ____(9) Don't know

9. **Do you think the tourism industry in Miami Beach adds to the success of your business?**

____(1) Yes ____(2) No ____(9) Don't know

10. **FEELING OF SAFETY. Please rate how safe you and your employees feel in the following areas of Miami Beach using a scale of 1 to 5, where 5 means "Very Safe" and 1 means "Very Unsafe."**

	How Safe do you feel:	Very Safe	Safe	Somewhat Safe	Unsafe	Very Unsafe	Don't Know
1.	In and around your place of business during the daytime?	5	4	3	2	1	9
2.	In and around your place of business during the evening/night?	5	4	3	2	1	9

11. **STREET LIGHTING. Do you think the amount of street lighting near your business is:**

____(1) Too much/too bright ____(2) About right ____(3) Too little/too dark ____(9) Don't know

12. **PERCEPTIONS OF THE CITY.** **Please rate your satisfaction with each of the following using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."**

How Satisfied are you with:	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
1. Value you receive for the City taxes your business pays	5	4	3	2	1	9
2. The overall quality of services provided by the City of Miami Beach	5	4	3	2	1	9
3. The City meeting your expectations with the services provided	5	4	3	2	1	9
4. City efforts to be a "green" or sustainable city	5	4	3	2	1	9
5. Stormwater Drainage	5	4	3	2	1	9
6. City regulation of residential development	5	4	3	2	1	9
7. City regulation of commercial development	5	4	3	2	1	9

13. **Please rate your agreement with the following statements using a scale of 1 to 5, where 5 means "Strongly Agree" and 1 means "Strongly Disagree."**

Please rate your level of agreement with the following statements:	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know
1. Sustainability and Resiliency are important to my business	5	4	3	2	1	9
2. I am informed about local climate change issues	5	4	3	2	1	9
3. I have observed coastal water level increases	5	4	3	2	1	9
4. I have observed increased flooding	5	4	3	2	1	9
5. I have observed increase water temperatures	5	4	3	2	1	9
6. I have taken steps to make my business more energy efficient	5	4	3	2	1	9
7. I have taken steps to make my business more water efficient	5	4	3	2	1	9

14. **CODE ENFORCEMENT.** **Do you think the level of code enforcement and ordinance established by the City of Miami Beach near your business is:**

____(1) Too much/too restrictive ____(2) About right ____(3) Too little/not restrictive enough ____(9) Don't know

15. **Do you support or oppose the City of Miami Beach spending tax dollars to address rising sea levels?**

____(1) Support ____(2) Oppose ____(9) Don't know

16. **Do you think historic preservation efforts in the City of Miami Beach have been:**

____(5) Very effective ____(3) Neither effective nor ineffective ____(1) Very ineffective
____(4) Somewhat effective ____(2) Somewhat ineffective ____(9) Don't know

17. **PUBLIC TRANSIT.** **Over the past 12 months, how would you rate the overall effectiveness of the public transit system that serves the City of Miami Beach?**

____(4) Excellent ____(3) Good ____(2) Fair ____(1) Poor ____(9) Don't know

18. **Over the past 12 months, how would you rate effectiveness of the public transit in bringing employees to your business?**

____(4) Excellent ____(3) Good ____(2) Fair ____(1) Poor ____(9) Don't know

19. **Which of the following has your business done to provide additional transit options for your employees?** *(Check all that apply.)*

____(1) Provide free or subsidized parking spots ____(3) Coordinate carpool(s) ____(5) None at this time
____(2) Encourage public transit use ____(4) Other: _____

20. Which of the following best describe the availability of public and private parking for your customers?

____(1) There are almost always parking places nearby   ____(4) There are almost never parking places nearby
____(2) There are often parking spaces nearby   ____(9) Don't know
____(3) There are seldom parking places nearby

21. COMMUNICATION. Which source do you utilize to obtain information about city government, issues, and events? *(Check all that apply.)*

____(1) MB Magazine   ____(7) Radio *(1670am)*
____(2) MBTV *(City's TV Government channel)*   ____(8) Forums/workshops/meetings
____(3) Twitter   ____(9) City's E-Gov app
____(4) Facebook   ____(10) Other news media: _____
____(5) City Website *(www.miamibeachfl.gov)*   ____(11) HOA's or other civic groups: _____
____(6) City e-mail news

22. How useful is the information that the City of Miami Beach sends to you about city programs, activities, policies and events?

____(1) Very useful   ____(2) Somewhat useful   ____(3) Not useful at all   ____(9) Don't know

23. POLICE COMMUNICATION. In the past 6 months please indicate if you have accessed any of the Police Department's social media platforms:

____(1) Twitter   ____(2) Facebook   ____(3) Have not accessed *[Skip to Question 24.]*

23-2. How useful is the information the City of Miami Beach Police Department's social media platform(s) provide?

____(1) Very useful   ____(2) Somewhat useful   ____(3) Not useful at all   ____(9) Don't know

24. Please rate your satisfaction with each of the following using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

How Satisfied are you with:	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
1. MB Magazine	5	4	3	2	1	9
2. MBTV *(City's government channel)*	5	4	3	2	1	9
3. Social Media engagement *(Twitter, Facebook)*	5	4	3	2	1	9
4. Website	5	4	3	2	1	9
5. E-mail news	5	4	3	2	1	9
6. E-Gov app	5	4	3	2	1	9

25. CUSTOMER SERVICE. During the last 12 months, how many times have you personally contacted, either by phone, in-person or electronically the City of Miami Beach government with a question, service request or complaint?

_____ times *[If more than "0" times, answer Question 25-2.]*

25-2. What was the reason for your most recent contact?

____(1) Pay a bill   ____(4) Pull a building permit/plan review   ____(7) Other: _____
____(2) Visit an elected official   ____(5) Attend a program/event   ____(8) Don't remember
____(3) Research an issue   ____(6) File a complaint

26. **CITY INTERACTION WITH RESIDENTS.** **Please rate your agreement with the following statements using a scale of 1 to 5, where 5 means "Strongly Agree" and 1 means "Strongly Disagree," based on your most recent interaction with City employees.**

	Please rate your level of agreement with the following statements:	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know
1.	The city of Miami Beach government is open and interested in hearing the concerns or issues of residents	5	4	3	2	1	9
2.	It is easy to get a hold of someone at the City who can help you	5	4	3	2	1	9
3.	City employees are courteous and professional	5	4	3	2	1	9
4.	City employees have had the proper training	5	4	3	2	1	9
5.	City employees possess the proper knowledge	5	4	3	2	1	9
6.	During my most recent contact with the City, I found the process to be user-friendly and easy to understand	5	4	3	2	1	9
7.	During my most recent contact with the City, the requests made by my business were processed in a timely manner	5	4	3	2	1	9
8.	During my most recent contact with the City, overall I was satisfied with the experience I had contacting the City	5	4	3	2	1	9

27. **How satisfied are you with the overall quality of leadership provided by the City's elected officials?**

____(5) Very satisfied ____(3) Neutral ____(1) Very dissatisfied
____(4) Satisfied ____(2) Dissatisfied ____(9) Don't know

28. **What is the primary reason your business originally decided to locate in Miami Beach?**

_____

29. **Compared to all you know or have heard about operating a business in other cities, how would you rate Miami Beach as a place to run a business?**

____(1) Better ____(2) About the Same ____(3) Worse ____(9) Don't Know

30. **Compared to previous years, how you would currently rate the City of Miami Beach as a place to do business?**

____(1) Gotten Better ____(2) About the Same ____(3) Gotten Worse ____(9) Don't Know

31. **Think for a moment about whether you would recommend the City of Miami Beach to others as a place to run a business. Would you:**

____(1) Definitely recommend *[Answer Question 31-2.]* ____(3) Probably not recommend ____(9) Don't know
____(2) Probably recommend *[Answer Question 31-2.]* ____(4) Definitely not recommend

31-2. **Why would you recommend other businesses to open an office in Miami Beach?**

_____
_____

32. **What do you think will be the most important challenge for your business in Miami Beach over the next several years?**

_____
_____

33. **What is ONE thing the City of Miami Beach could do to help your business succeed?**

_____

DEMOGRAPHICS

D1. **Are you an owner or manager at your business?**

_____(1) Yes   _____(2) No *[What is your role? _____]*

D2. **How long has your business been in the City of Miami Beach?** _____ years

D3. **Approximately how many full-time employees does your business currently have?**

_____ employees

D4. **Approximately how many part-time employees does your business currently have?**

_____ employees

D5. **On average, what is the annual gross sales/revenue of your business?** $_____ per year

D6. **How many locations do you have inside the City of Miami Beach?** _____ locations

D7. **How many locations do you have outside the City of Miami Beach?** _____ locations

D8. **What type of business is your establishment?**

_____(01) Manufacturing   _____(07) Health care/medical/social services
_____(02) Finance/insurance   _____(08) Transportation/warehousing
_____(03) Administrative and support services   _____(09) Professional, scientific/technical services
_____(04) Wholesaler/distributor   _____(10) Real estate and rental and leasing
_____(05) Retail trade   _____(99) Other: _____
_____(06) Accommodation and food services

This concludes the survey – Thank you for your time!
Please return your completed survey in the enclosed postage-paid envelope addressed to:
ETC Institute, 725 W. Frontier Circle, Olathe, KS 66061

Your responses will remain Completely Confidential. The information printed to the right will ONLY be used to help identify which areas of the City are having problems with city services. If your address is not correct, please provide the correct information. Thank you.