

MIAMIBEACH

Executive Summary

TOPLINE OVERVIEW OF RESIDENTIAL RATINGS

The City of Miami Beach received a wide range of ratings from residents and businesses in the 2014 City of Miami Beach Community Survey. In the residential survey, quality of life measures trended down somewhat from the 2012 study. Ratings for City services were down from 2012 as eighteen of the nineteen services had lower ratings in 2014 – ratings for the other services were stable from 2012 to 2014. Ratings for historic preservation and development were stable from 2012 to 2014.

Several ratings for transportation and parking were stable from 2012 to 2014, yet two critical areas, traffic flow and road conditions, experienced significant drops in ratings. Ratings across eight safety measures were stable with each varying only a point or two from 2012 results. In the area of culture, entertainment and tourism, fewer residents in 2014 claimed that Miami Beach had the right number of museums, cultural activities, family-friendly activities, and major events. Ratings on taxes and the economy were mixed when compared to 2012 results, while customer service ratings were down across all five measures from 2012 to 2014. Awareness of, and satisfaction with, the City's website were down slightly.

TOPLINE OVERVIEW OF BUSINESS RATINGS

Ratings of City government by businesses also varied considerably across issues. Ratings for some City services were high while others were low, yet 2014 ratings lagged slightly below 2012 ratings. Ratings on historic preservation issues were stable in 2014 just as they were for residents. Ratings for planning, zoning and construction issues fell below 2012 ratings as did transportation issues, for the most part. Safety ratings in 2014 were similar to commensurate ratings in 2012. Ratings for the economy and taxes were lower in 2014, and customer service ratings were up slightly across the board. As with the residential surveys, the overall snapshot of business ratings of the City of Miami Beach were, on the whole, slightly down from the 2012 ratings. Nonetheless, a substantial number of City services received positive ratings from 70% to 95% of businesses.

RESIDENTIAL FINDINGS

Quality of life measure was high (77%), yet down considerably from 2012 (89%). Percentages of residents who would recommend Miami Beach as a place to live trended up and was high (81%). More residents described Miami Beach as a worse place to live (29% in 2014 versus 21% in 2012).

Ratings for City services decreased an average of six percentage points from 2012 to 2014. Storm drainage (25% positive ratings) and addressing homelessness (37% positive ratings) were the lowest rated services in 2014, and each of these services was rated lower in 2014 than in 2012.

City services that received comparatively high percentages of positive ratings included (positive ratings in parentheses):

- Quality of beaches (82%)
- Playground appearance (81%)
- Appearance & maintenance of public buildings (79%)
- Recreation programs (79%)
- Garbage & trash collection (79%)
- Park maintenance (76%)
- Public schools (75%)

The City's efforts to meet residents' expectations in delivering services dropped from 67% in 2012 to 58% in 2014. Code enforcement ratings remained stable from 2012 to 2014 (61% positive in 2012 and 62% positive in 2014). Ratings of neighborhood noise trended downward from 75% in 2012 to 69% in 2014. The City of Miami Beach received below average ratings on its efforts to be green (59% positive), which were also down from 2012. There is significant residential support (87%) for tax dollar spending to address rising sea levels.

Scores on the two historic preservation issues were similar to 2012, and while effectiveness of historic preservation efforts received high marks (74% positive), efforts to regulate development received only 53% positive ratings.

Transportation ratings trended down for the most part since 2009. Satisfaction with the availability of parking remained stagnant at 24%. Traffic flow (16% positive, down 7 percentage points) and road conditions (32% positive, down 12 percentage points) received low evaluations.

Several safety issues received high marks in 2014, e.g., 93% positive ratings for the fire department, 92% positive ratings for emergency medical response, and 88% positive ratings for ocean rescue. Residents felt safe during the daytime and at night, even in commercial areas.

Residential ratings for the right amount of museums (57% in 2014 compared to 61% in 2012), family friendly activities (61% in 2014, 66% in 2012), and major events (67% in 2014, 71% in 2012) lagged behind results from 2012.

The perceived value of City services remained about the same at 58% in 2014. Capital improvement ratings dropped in 2014 as 77% of residents gave positive ratings.

Residents in 2014 reported getting their news about City government less frequently from newspapers as internet news sources and local television news programs rivaled newspapers as sources for City government news. Three out of four residents (75%) claimed there was some value in the information they received from City Hall.

Customer service ratings trended down from 2012 to 2014 with fewer percentages of residents giving City employees high marks for the ease of finding someone to help (61%) and overall satisfaction (62%). Three in five residents (63%) claimed the City was open to hearing their concerns.

The typical resident who participated in the study:

- White (93%)
- Evenly split between Hispanic/Latino (50%) and not (50%)
- Live in an apartment or condo (69%)
- Homeowner (79%)
- Lived in Miami Beach for 18 years
- 49 years of age
- Earns \$58,000 per year
- Married (53%), yet 29% were single living alone and 13% were single and living with a partner/roommate
- Speaks English at home (79%), although 16% speak Spanish at home
- Lives in Miami Beach year round
- Female (51%)

BUSINESS FINDINGS

Ratings by businesses for many City-provided services were high in 2014 (e.g., 83% positive ratings for park maintenance, 82% for quality of beaches and 79% for appearance & maintenance of public buildings). Conversely, only 31% of businesses gave positive ratings for storm drainage. Ratings were down slightly from 2012, especially for storm drainage and landscape maintenance in rights of way & public places, which were down six percentage points since 2012. On the other hand, addressing homelessness was up eight percentage points since 2012.

Seven in ten businesses (71%) thought inspections were fair. Nearly seven in ten businesses (69%) thought the level of code enforcement was just right, this figure was up eight percentage points since 2012.

Historic preservation ratings were down in 2014 as 77% of businesses gave positive evaluations to the City's historic preservation efforts. While up from 2012, only 64% of businesses thought that the City's efforts to regulate development were just right.

Transportation ratings were down in all areas. Only 31% of businesses gave positive ratings for customer parking availability. Positive ratings for condition of roads, effectiveness of public transportation for employees, and effectiveness of public transportation for customers were in the 30% to 50% range and similar to 2012. Traffic flow received one of the lowest ratings as only 25% of businesses gave this service positive ratings.

Safety ratings were very high in some areas (e.g., 93% positive ratings for fire department and 92% positive for emergency medical response) and moderate in others (e.g., 77% positive ratings for police). Most safety ratings were up from 2012 levels with the exception of ratings for emergency medical response and commercial area daytime safety.

Seven out of ten businesses felt the number of restaurants (71%) and major events (72%) was about right, while four out of ten businesses thought there were too few museums (40%) and family friendly activities (38%). Businesses' positive ratings for City's

management of special events were about the same as in 2012.

Businesses were less likely in 2014 (65% compared to 70% in 2012) to claim that tourism added to their success. Over half of businesses (56%) claimed that the Miami Beach Convention Center added to the success of their business. The overall value of City services based on tax levels increased slightly in 2014 to 54% positive ratings. Six in ten businesses (61%) support improvements of at least \$300 million for the Miami Beach Convention Center.

In 2014, fewer businesses received their news about the City from newspapers and the City website. One in three businesses (32%) reported receiving City news via internet news sources. Nearly nine out of ten businesses (89%) indicated there was some value in information received from the City of Miami Beach.

Customer service ratings were up across all attributes in 2014, yet only 64% of businesses gave high ratings to the ease of finding someone to help and timely processing by City employees. Four in five businesses (82%) gave high marks to the professionalism of City employees. Six in ten businesses (61%) claimed the City was open to hearing businesses' concerns.

Use of the City's website by businesses was down from 2012 to 2014 with 58% of businesses claiming to use the site. Satisfaction with the City's website was high (88% positive ratings), yet down slightly from 2012.

Just under half of the businesses (47%) reported being inspected by the building department in the past three years. In general, the department received moderate ratings. Only 59% gave a positive evaluation of the department for overall satisfaction. Over half (56%) of businesses perceived the building department as being open to hearing their concerns. Two in three businesses (66%) thought the building department's inspections were consistent over time or believed that the inspections were fair. On the other hand, building department employees received higher evaluations on all ratings.

The fire department received generally high marks for its inspections of businesses. The 56% of businesses that had been inspected by the fire department in the past three years gave fire department employees high marks for courteousness and professionalism (89% positive ratings) and for having proper training and knowledge (89% positive), but both figures are down from 2012. Nearly nine out of ten businesses (87%) gave the fire department positive ratings for overall satisfaction, and a high percentage of businesses rated the department positively on consistency of inspections over time (86% positive) and on fairness of inspections (89% positive). Over eight out of ten businesses (84%) believed that the fire department was open to hearing their concerns, which was up slightly from 2012.

The planning department received generally moderate marks for its inspections of businesses. The 34% of businesses that had been inspected by the planning department in the past three years gave planning department employees somewhat high marks for courteousness and professionalism (74% positive ratings) and for having proper training and knowledge (74% positive). Only 68% of businesses gave the planning department positive ratings for overall satisfaction. A somewhat high percentage of businesses rated the department positively on consistency of inspections over time (74% positive) and on fairness of inspections (74% positive). Seven out of ten businesses (71%) believed that the planning department was open to hearing their concerns.

Six in ten businesses (60%) believed that City Hall met their expectations in terms of delivering City services. Yet nearly half of businesses (49%) thought of Miami Beach as a better place to run a business compared to other municipalities. Four in five business owners and managers (82%) would recommend the City of Miami Beach as a place to do business compared to 70% two years ago. Business owners and managers identified parking, high property taxes, and high rent as the greatest challenges. Business owners also support tax dollar spending for addressing rising sea levels (87%) and building a rapid transit system (77%).

The typical business (or owner/manager) interviewed for the 2014 study was:

- 47% — Owner (46% manager)
- Been in business 12 years
- Had five employees
- Had annual sales/revenue of \$525,000
- Had one Miami Beach location
- Had no locations outside Miami Beach
- 57% — Male
- 18% — Retail businesses (17% — professional services)

Summary of Residential Survey

Quality of life measures	2014 rating	Rating category ¹	Historic trend ²	2012 rating
Quality of life	77	Somewhat high ¹	Trending down	89
Place to live - compared to a few years ago	38	Average	Trending down	47
Recommend Miami Beach	81	Somewhat high	Trending up	77
City services	2014 rating	Rating category	Historic trend	2012 rating
Street cleanliness in neighborhoods	68	Average	Trending down	74
Street cleanliness in commercial areas	61	Average	Trending down	69
Cleanliness of canals/waterways	53	Below average	Trending down	57
Storm drainage	25	Very low	Trending down	37
Sidewalk conditions	50	Below average	Trending down	58
Street lighting	65	Average	Trending down	71
Appearance & maintenance of public buildings	79	Somewhat high	Trending down	87
Quality of beaches	82	High	Stable	84
Recreation programs	79	Somewhat high	Trending down	85
Playground appearance	81	High	Stable	84
Park maintenance	76	Somewhat high	Trending down	82
Landscape maintenance	70	Somewhat high	Trending down	79
Garbage & trash collection	79	Somewhat high	Stable	81
Addressing homelessness	37	Very low	Trending down	42
Public schools	75	Somewhat high	Trending down	90
Efforts to be "green"	59	Below average	Trending down	66
Meet expectations for City services	58	Below average	Trending down	67
Level of code enforcement	62	Average	Stable	61
Neighborhood noise	69	Average	Trending down	75
Tax dollar spending for rising sea levels	87	High	--	--
Historic preservation & development	2014 rating	Rating category	Historic trend	2012 rating
Effectiveness of historic preservation efforts	74	Somewhat high	Trending down	78
Efforts to regulate development	53	Below average	Stable	55
Transportation & parking	2014 rating	Rating category	Historic trend	2012 rating
Car - primary transportation	73	High	Stable	74
Walking or biking - primary transportation	11	Low	Stable	11
Public bus - primary transportation	6	Low	Stable	4
Parking availability - about right	24	Very low	Stable	27
Traffic flow	16	Very low	Trending down	23
Road condition	32	Very low	Trending down	44
Willing to ride bus	49	Low	Stable	49
Willing to ride bicycles	39	Very low	Trending down	48
Availability of bike paths/lanes - about right	40	Below average	Trending down	45
Willingness to reduce on-street parking for bike lanes	46	Low	Stable	43
Willingness to reduce on-street parking for shade trees	43	Low	Stable	40

1 Very high – 90%+; High – 80%+; Somewhat high – 70%+; Average – 60%+; Below average – 50%+; Low – 40%+; Very low <40%.

2 2014 results were compared to 2012 results for issues related to City services.

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Willingness to reduce on-street parking for trolley cars	38	Very low	Trending up	34
Willingness to reduce on-street parking for vehicle lanes	36	Very low	Stable	35
Willingness to reduce on-street parking for sidewalks	36	Very low	Trending up	31
Willingness to reduce on-street parking for bus lanes	32	Very low	Trending up	28
Safety	2014 rating	Rating category	Historic trend	2012 rating
Police department	67	Average	Stable	66
Emergency medical response	92	Very high	Stable	89
Fire department	93	Very high	Stable	91
Ocean rescue, lifeguard, beach patrol	88	High	Stable	86
Emergency/hurricane preparedness	84	High	Stable	83
Neighborhood daytime safety	98	Very high	Stable	98
Neighborhood night-time safety	88	High	Stable	91
Commercial area night-time safety	85	High	Stable	85
Culture, entertainment, tourism	2014 rating	Rating category	Historic trend	2012 rating
Number of museums - about right	57	Below average	Trending down	61
Number of cultural activities - about right	65	Average	Stable	67
Number of family friendly activities - about right	61	Average	Trending down	66
Number of major events - about right	64	Average	Trending down	71
Number of restaurants - about right	71	Somewhat high	NA	NA
Number of bars & nightclubs	59	Below average	NA	NA
Visited the Bass Museum of Art	2 times ¹	--	--	3 times
Visited the Miami Beach Convention Center	2 times	--	--	4 times
Visited the Fillmore at the Jackie Gleason Theatre	2 times	--	--	3 times
Visited the Colony Theatre	1 time	--	--	2 times
Visited the Byron Carlyle Theatre	1 time	--	--	1 time
Visited the Collins Avenue business area - at least weekly	63	--	NA	NA
Visited the Alton Road business area - at least weekly	57	--	NA	NA
Visited the Lincoln Road business area - at least weekly	60	--	NA	NA
Visited the 41st Street business area - at least weekly	46	--	NA	NA
Visited the Collins (72nd-75th) business area - at least weekly	38	--	NA	NA
Visited the 71st Street business area - at least weekly	38	--	NA	NA
Visited the Washington Avenue business area - at least weekly	42	--	NA	NA
Visited the South of 5th Street business area - at least weekly	34	--	NA	NA
Visited the Sunset Harbor business area - at least weekly	33	--	NA	NA
Visited the Ocean Drive business area - at least weekly	27	--	NA	NA

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Average for all residents

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Visited the Ocean Terrace business area - at least weekly	18	--	NA	NA
Management of special events	55	Below average	Stable	57
Effect of tourism on quality of life - adds	64	Average	Trending down	70
Economy and taxes	2014 rating	Rating category	Historic trend	2012 rating
Value of City services	58	Below average	Stable	56
Capital improvement projects	77	Somewhat high	Trending down	81
Communication	2014 rating	Rating category	Historic trend	2012 rating
Get City news from local TV news	28	--	Trending up	19
Get City news from newspaper	26	--	Stable	25
Get City news from internet news sources	25	--	Trending up	18
Get City news from Miami Beach website	20	--	Stable	23
Value of information from City - useful	75	Somewhat high	Trending down	87
Contacted the City in the past year	50	--	Trending up	45
Reason for contacting City - file complaint	50	--	Trending up	42
Reason for contacting City - research an issue	20	--	Trending up	16
Reason for contacting City - pull a building permit	7	--	Stable	10
Reason for contacting City - pay a bill	6	--	Stable	7
Method of contacting City - telephone	66	--	Stable	67
Method of contacting City - email	16	--	Stable	13
Method of contacting City - in-person	12	--	Stable	13
Customer service	2014 rating	Rating category	Historic trend	2012 rating
Ease of finding someone to help	61	Average	Trending down	70
Professionalism of City customer service representative	79	Somewhat high	Trending down	85
Competency of City customer service representative	71	Somewhat high	Trending down	75
Overall satisfaction with City customer service	62	Average	Trending down	71
Openness to hearing residents' concerns	63	Average	Trending down	67
City's website	2014 rating	Rating category	Historic trend	2012 rating
Aware of City's website	50	Below average	Trending down	55
Satisfaction with City's website	79	Somewhat high	Trending down	87
Demographics	Statistic			
White	93%			
Latino/Hispanic	50%			
Hispanics born in Cuba	30%			
Live in an apartment or condo	69%			
Homeowner	79%			
Years in Miami Beach	18 years			
Age	49 years of age			
Household income	\$58,000			
Married	53%			
Speaks English at home	79%			
Female	51%			

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Summary of Business Survey

City services	2014 rating	Rating category ¹	Historic trend	2012 rating
Street cleanliness	63	Average ¹	Stable	62
Cleanliness of canals/waterways	59	Below average	Stable	59
Storm drainage	31	Very low	Trending down	37
Sidewalk condition	61	Average	Stable	64
Appearance & maintenance of public buildings	79	Somewhat high	Trending down	83
Quality of beaches	82	High	Trending down	86
Park maintenance	83	High	Stable	86
Landscape maintenance in rights of way & public places	74	Somewhat high	Trending down	80
Garbage & trash collection	72	Somewhat high	Stable	71
Addressing homelessness	39	Very low	Trending up	31
City's efforts to be "green"	66	Average	--	--
Planning, zoning, construction	2014 rating	Rating category	Historic trend	2012 rating
Inspected for license	51	--	--	--
Inspected for property maintenance	35	--	--	--
Inspected for sanitation	32	--	--	--
Inspected for signage	24	--	--	--
Inspected for site plans	18	--	--	--
Inspected for solicitation, flyers, or handbills	13	--	--	--
Inspected for zoning for special events	13	--	--	--
Inspected for noise	10	--	--	--
Inspections were fair	71	Somewhat high	Stable	69
Level of code enforcement-about right	69	Average	Trending up	61
Historic preservation & development	2014 rating	Rating category	Historic trend	2012 rating
Effectiveness of historic preservation efforts	77	Somewhat high	Trending down	82
Efforts to regulate development	64	Average	Stable	61
Transportation & parking	2014 rating	Rating category	Historic trend	2012 rating
Effectiveness of public transportation for customers	52	Below average	Stable	52
Effectiveness of public transportation for employees	53	Below average	Stable	56
Condition of roads	36	Very low	Trending down	40
Customer parking availability	31	Very low	Trending down	40
Traffic flow	25	Very low	Trending down	34
Safety	2014 rating	Rating category	Historic trend	2012 rating
Police department	77	Somewhat high	Trending up	71
Emergency medical response	92	Very high	Stable	93
Fire department	93	Very high	Stable	93
Ocean rescue, lifeguard, beach patrol	89	High	Stable	88
Emergency/hurricane preparedness	88	High	Stable	86
Commercial area daytime safety	93	Very high	Stable	95

¹ Very high – 90%+; High – 80%+; Somewhat high – 70%+; Average – 60%+; Below average – 50%+; Low – 40%+; Very low <40%.

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Commercial area nighttime safety	82	High	Stable	82
Street lighting	72	Somewhat high	Trending up	68
Culture, entertainment, tourism	2014 rating	Rating category	Historic trend	2012 rating
Number of restaurants - about right	71	Somewhat high	Stable	68
Number of nightclubs - about right	63	Average	Stable	64
Number of museums - about right	57	Below average	Trending up	36
Number of cultural activities - about right	68	Average	Trending up	53
Number of family friendly activities - about right	58	Below average	Trending up	46
Number of major events - about right	72	Somewhat high	Trending up	66
Management of special events	58	Below average	Stable	59
Economy and taxes	2014 rating	Rating category	Historic trend	2012 rating
Overall value of services received	54	Below average	Stable	52
Miami Beach Convention Center adds to the success of your business	39	Very low	--	--
Tourism adds to the success of your business	65	Average	Trending down	70
Communication	2014 rating	Rating category	Historic trend	2012 rating
Get City news from internet news sources	32	--	Trending up	24
Get City news from Miami Beach website	18	--	Trending down	22
Get City news from email/direct mail from City	17	--	Stable	17
Get City news from local TV news	12	--	Stable	9
Get City news from newspaper	13	--	Trending down	17
Value of information from City - useful	89	High	Stable	88
Contacted the City in the past year	51	--	Trending down	62
Reason for contacting City - file complaint	36	--	Stable	34
Reason for contacting City - research an issue	16	--	Stable	15
Reason for contacting City - pull a building permit	14	--	Stable	15
Reason for contacting City - obtain a license	10	--	Stable	10
Method of contacting City - telephone	62	--	Trending down	69
Method of contacting City - email	13	--	Stable	12
Method of contacting City - in-person	21	--	Stable	18
Customer service	2014 rating	Rating category	Historic trend	2012 rating
Ease of finding someone to help	64	Average	Stable	61
Professionalism of City customer service representative	82	High	Stable	81
Training & knowledge of customer service representative	78	Somewhat high	Trending up	74
User friendliness of process	69	Average	Stable	66
Timely processing of customer service requests	64	Average	Stable	61
Overall satisfaction with City customer service	66	Average	Stable	63
City open to business' concerns	61	Average	Stable	59
City's website	2014 rating	Rating category	Historic trend	2012 rating
Visited City's website	58	Below average	Trending down	66
Satisfaction with City's website	88	High	Stable	91

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Code inspections	2014 rating	Rating category	Historic trend	2012 rating
Inspected by building department in past three years	47	--	Trending down	55
Easy to get service at building department	62	Average	Trending up	53
Building department employees were courteous & professional	76	Somewhat high	Trending up	71
Building department employees had the proper training & knowledge	74	Somewhat high	Trending up	70
Overall satisfaction with building department	59	Below average	Stable	58
Consistency in building department's inspections over time	63	Average	Stable	62
Fairness in building department's inspections	66	Average	Stable	63
Building department open to business' concerns	56	Below average	Stable	54
Inspected by fire department in past three years	56	--	Trending down	63
Easy to get service at fire department	85	High	Trending down	88
Fire department employees were courteous & professional	89	High	Stable	92
Fire department employees had the proper training & knowledge	89	High	Stable	92
Overall satisfaction with fire department	87	High	Stable	89
Consistency in fire department's inspections over time	86	High	Stable	85
Fairness in fire department's inspections	89	High	Stable	88
Fire department open to business' concerns	84	High	Stable	82
Inspected by planning department in past three years	34	--	--	--
Easy to get service at planning department	72	Somewhat high	--	--
Planning department employees were courteous & professional	74	Somewhat high	--	--
Planning department employees had the proper training & knowledge	74	Somewhat high	--	--
Overall satisfaction with planning department	68	Average	--	--
Consistency in planning department's inspections over time	74	Somewhat high	--	--
Fairness in planning department's inspections	74	Somewhat high	--	--
Planning department open to business' concerns	70	Somewhat high	--	--
City government	2014 rating	Rating category	Historic trend	2012 rating
City meets your expectations in delivering services	60	Average	Stable	61
Better or above average place to run a business	87	High	Stable	87
Place to run a business compared to past years - better + about the same	83	High	Stable	86
Recommend Miami Beach as a place to run a business	82	High	Trending up	70
Most important business challenge - parking	64	Very high	--	--

Most important business challenge - high property taxes	41	High	Trending down	59
Most important business challenge - high rent	43	High	Trending down	57
Most important business challenge - high insurance	37	High	Trending down	51
Tax dollar spending for rising sea levels	87	High	--	--
Tax dollar spending for rapid transit system	77	Somewhat high	--	--

Business profile		Statistic		
Owner		47%		
Manager		46%		
Years in business		12 years		
Number of employees		5 employees		
Annual sales		\$525,000		
Number of Miami Beach locations		1 location		
Male		57%		