

COMMISSION MEMORANDUM

TO: Honorable Mayor and Members of the City Commission

FROM: Rickelle Williams, Interim City Manager *RW*

DATE: May 15, 2024

SUBJECT: PRESENTATION OF THE 2024 COMMUNITY SATISFACTION SURVEY SUMMARY RESULTS

RECOMMENDATION

The purpose of this item is to provide a presentation of the 2024 Community Satisfaction Survey Summary Results. The presentation will be led by ETC Institute, the city's competitively procured survey consultant. The presentation is an excellent opportunity to recognize the intentional efforts of the City Commission and Administration working together to strategically invest in resources for services that residents and businesses care about the most. The results are also an opportunity to recognize dedicated employees that deliver these services through leadership, strategic initiatives, and day-to-day operations. Opportunities for improvement are also an important insight to inform the FY 25 budget process.

BACKGROUND/HISTORY

Statistically valid surveys are a government best practice to identify citywide priorities, opportunities for improvement, and to guide strategic planning and resource allocation through the budget process. The survey has broad representation from the entire community, including businesses. It is a unique opportunity to hear from residents and businesses that may not engage with traditional city meetings or other methods of outreach.

The city has historically conducted resident and business satisfaction surveys every two-to-three years. The 2024 survey is the ninth set of comprehensive, statistically valid surveys conducted. Survey results enable data-driven decisions regarding services and can inform strategic initiatives at a citywide and department-level.

ETC is a market research consulting firm and has specialized in the design and administration of market research for governmental organizations since 1982. Selected through a competitive procurement process, ETC is familiar with the City of Miami Beach and has consistency in survey methods, having conducted surveys for the city since 2016.

ANALYSIS

The survey was conducted between the months of February and April 2024 via mail, phone, and online. A total of 1,300 surveys were completed by residents and a total of 610 surveys by businesses with +/- 2.7% and +/- 3.9% margin of error respectively. Consistent with the 2022 survey, follow-up activity was paused during Spring Break. The final comprehensive reports will be shared with the Mayor and Commission via Letter to Commission and placed on the city's website.

Notable survey highlights are included below with further details included in Attachment A.

1. Perceptions of the city's image and efforts to prevent crime have improved significantly
2. Satisfaction with city services has increased significantly
3. Residents and business leaders feel much safer than they did two-years ago
4. Ratings for customer service by city employees have increased significantly
5. Miami Beach is setting the standard for the delivery of many city services

Top opportunities for improvements include:

- Efforts to address homelessness
- Stormwater management
- Cleanliness of streets & canals/waterways
- Street and sidewalk improvements

SUPPORTING SURVEY DATA

The 2024 Resident and Business Survey Findings Report is included as Attachment A.

FINANCIAL INFORMATION

Amount(s)/Account(s):

The 2024 Community Satisfaction Survey is funded within the current FY 24 Operating Budget for \$89,400.

CONCLUSION

The Administration recommends that the 2024 Community Satisfaction Survey Summary Results be utilized to recognize significant progress and to guide action and resources to deliver services that residents and businesses care about the most.

Strategic Connection

Implement City Commission goals and policies through the strategic plan and budget.

Sponsor

ATTACHMENTS

Presentation

MIAMI BEACH

2024 Resident & Business Survey Findings Report

PRESENTED BY ETC INSTITUTE

MAY 15, 2024



Since 2012,
ETC Institute Has
Surveyed More
Than **3,500,000**
Persons in
More Than
1,200 communities
around the world

ETC Institute is the Nation's
Leading Provider of Market
Research for Local Governments

*For more than 35 years, **our mission** has been
to help local governments gather and use
survey data to help make better decisions*

Agenda

Purpose, Methodology, and Demographics

6 Things to Remember

Other Findings

Summary

Questions

Purpose

To objectively assess satisfaction with the delivery of City services among residents & business leaders



To gather input from residents and business leaders to help City leaders set priorities for the community



To track the City's performance against itself and other communities over time

Methodology: Resident Survey

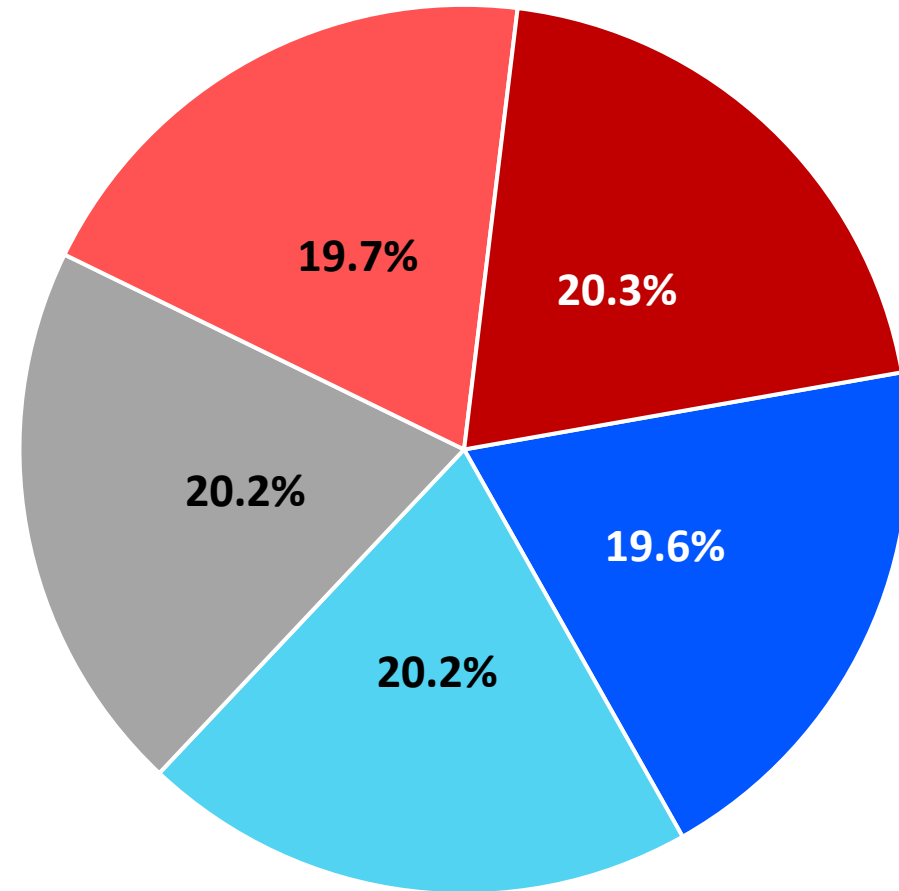
Survey Description	Method of Administration	Sample	Margin of Error
Similar to previous surveys conducted by ETC Institute. The last survey was conducted in 2022. Survey was conducted in English, Spanish and Creole.	Administered by mail, phone and online. ETC Institute encouraged participation with texts, emails, and social media ads.	The sample was designed to ensure the results would be statistically valid for five subareas of the City (South Pointe, South Beach, the Condo Corridor, Midbeach, and Northbeach)	1,300 completed surveys were collected +/- 2.7% at the 95% level of confidence

RESIDENT SURVEY

Good
Representation
by AGE

What is your Age?

by percentage of respondents (excluding not provided)



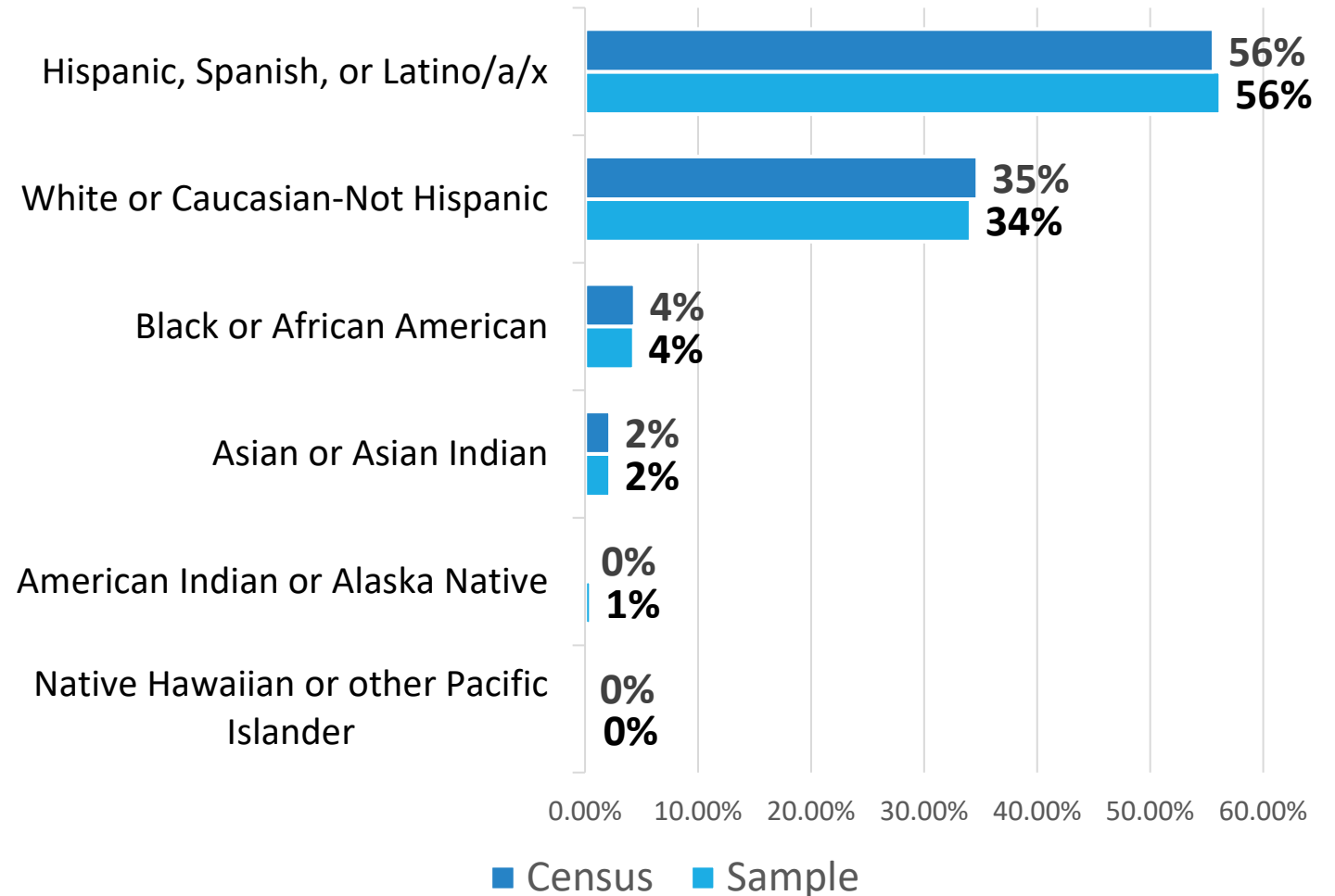
■ 18-34 ■ 35-44 ■ 45-54 ■ 55-64 ■ 65+

RESIDENT SURVEY

Good Representation by RACE

Which Of The Following Best Describes Your Race?

by percentage of respondents



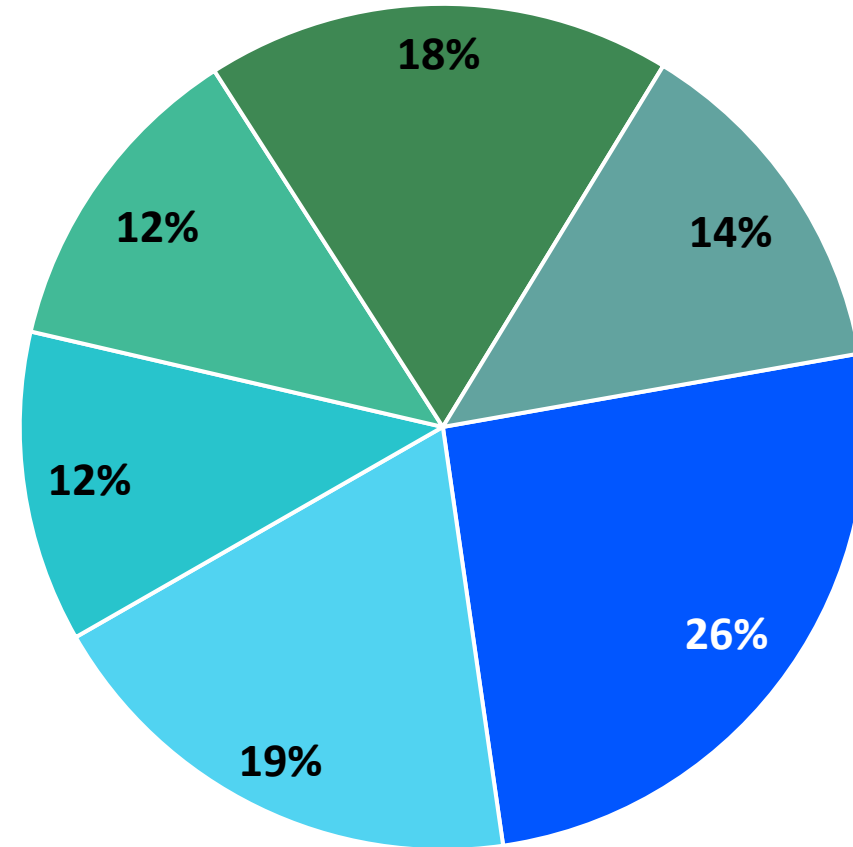
Distribution Is Similar to the Census

RESIDENT SURVEY

Good
Representation
by
YEARS OF
RESIDENCY

Approximately How Many Years Have You Lived In The City Of Miami Beach?

by percentage of respondents (excluding not provided)



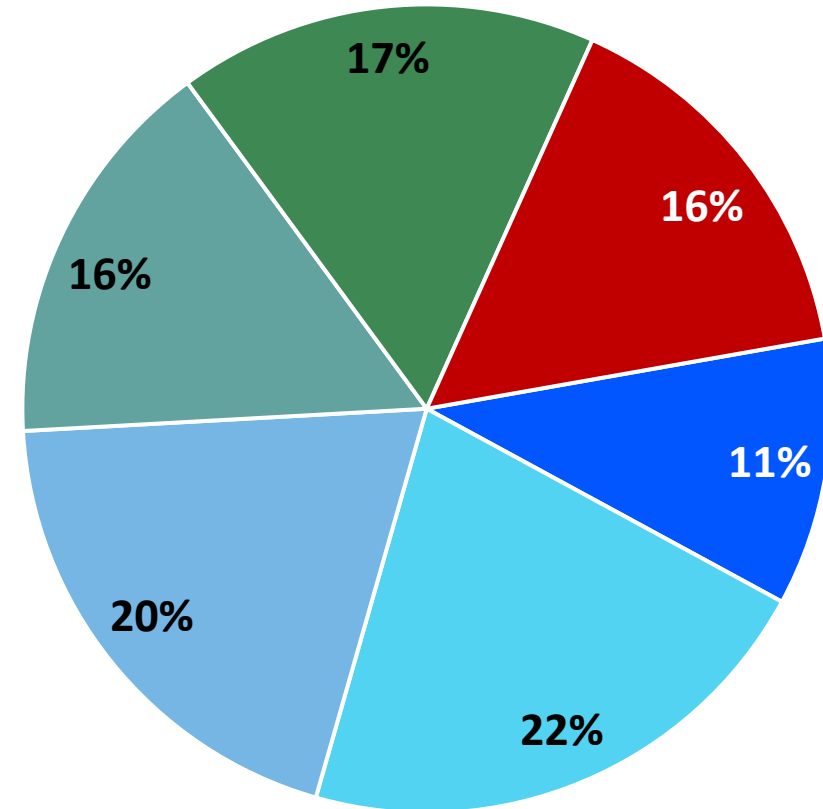
■ 0-5 years ■ 6-10 years ■ 11-15 years ■ 16-20 ■ 21-30 ■ 31+

RESIDENT SURVEY

Good
Representation
by
INCOME

What Is Your Combined Annual Income of All Members Of Your Household From All Sources Before Taxes?

by percentage of respondents



■ Under \$35K

■ \$75K to \$99,999

■ \$35K to \$74,999

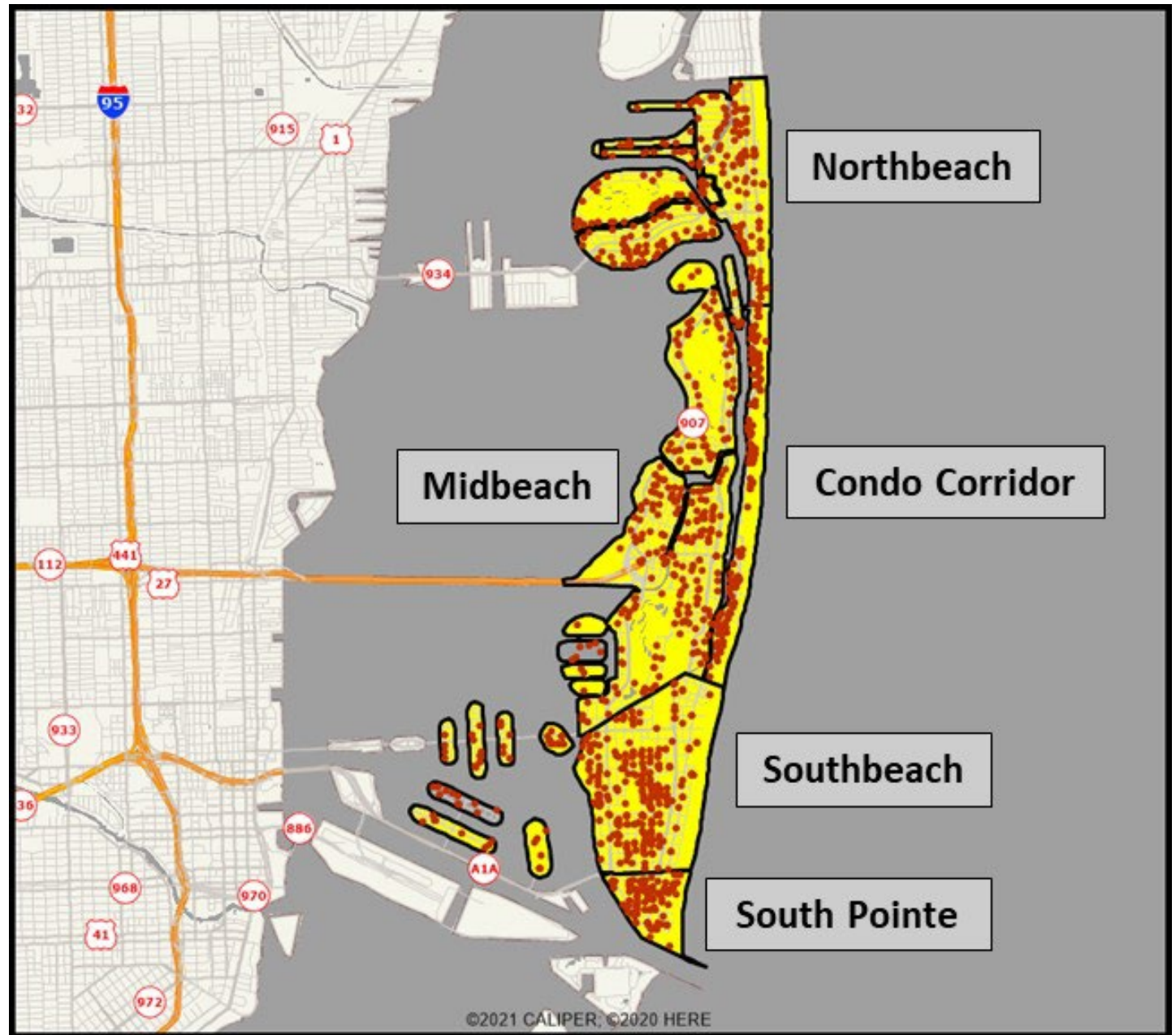
■ \$100K to \$149,999

Location of *RESIDENT* Survey Respondents

Good representation of responses throughout the City.

There were a total of 1,301 respondents. The number by area is provided below:

- 144 South Pointe
- 385 South Beach
- 250 Midbeach
- 206 Condo Corridor
- 315 Northbeach



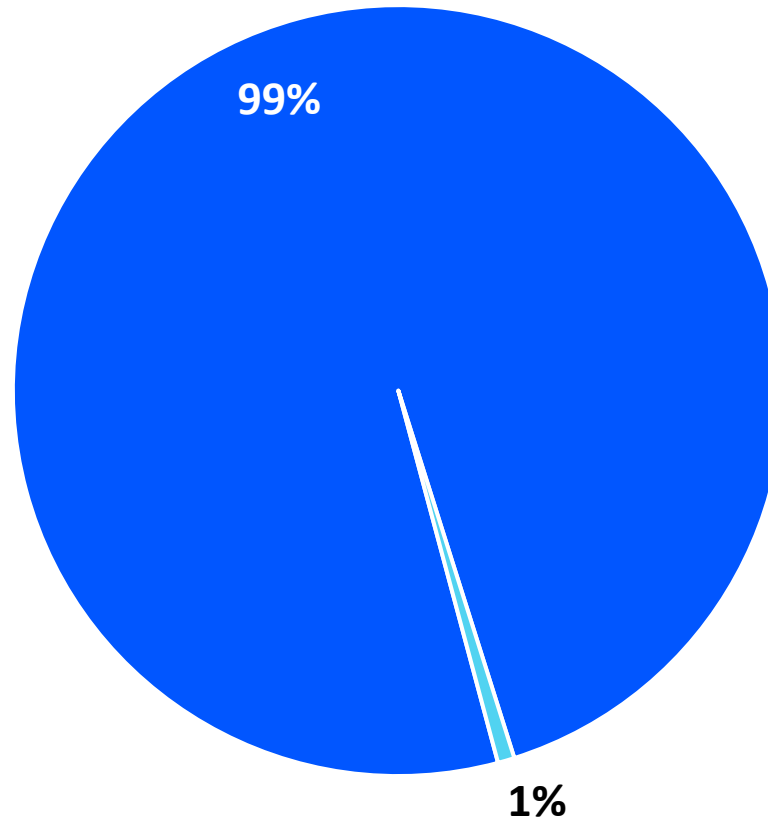
Methodology: Business Survey

Survey Description	Method of Administration	Sample	Margin of Error
Similar to previous surveys conducted by the City. The last survey was conducted in 2022.	Administered by mail, phone and online. Survey was conducted in English, Spanish and Creole.	The sample was designed to ensure the results would be statistically representative of the City's diverse business population.	610 completed surveys were collected +/- 3.9% at the 95% level of confidence

Most of the
Respondents
Were the
Owner or
Senior
Manager

Are You an Owner or Manager At Your Business?

by percentage of respondents (excluding not provided)

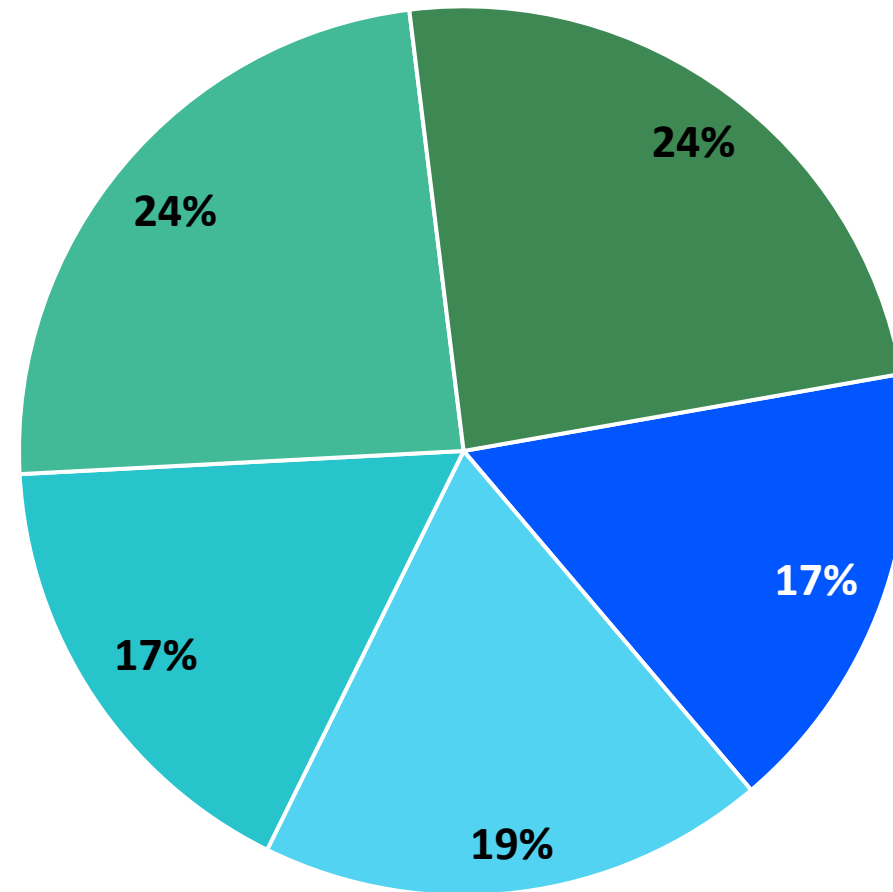


■ Yes ■ No

There Was
Good
Representation
by Years of
Operation in
Miami Beach

How Long Has Your Business Been in the City Of Miami Beach?

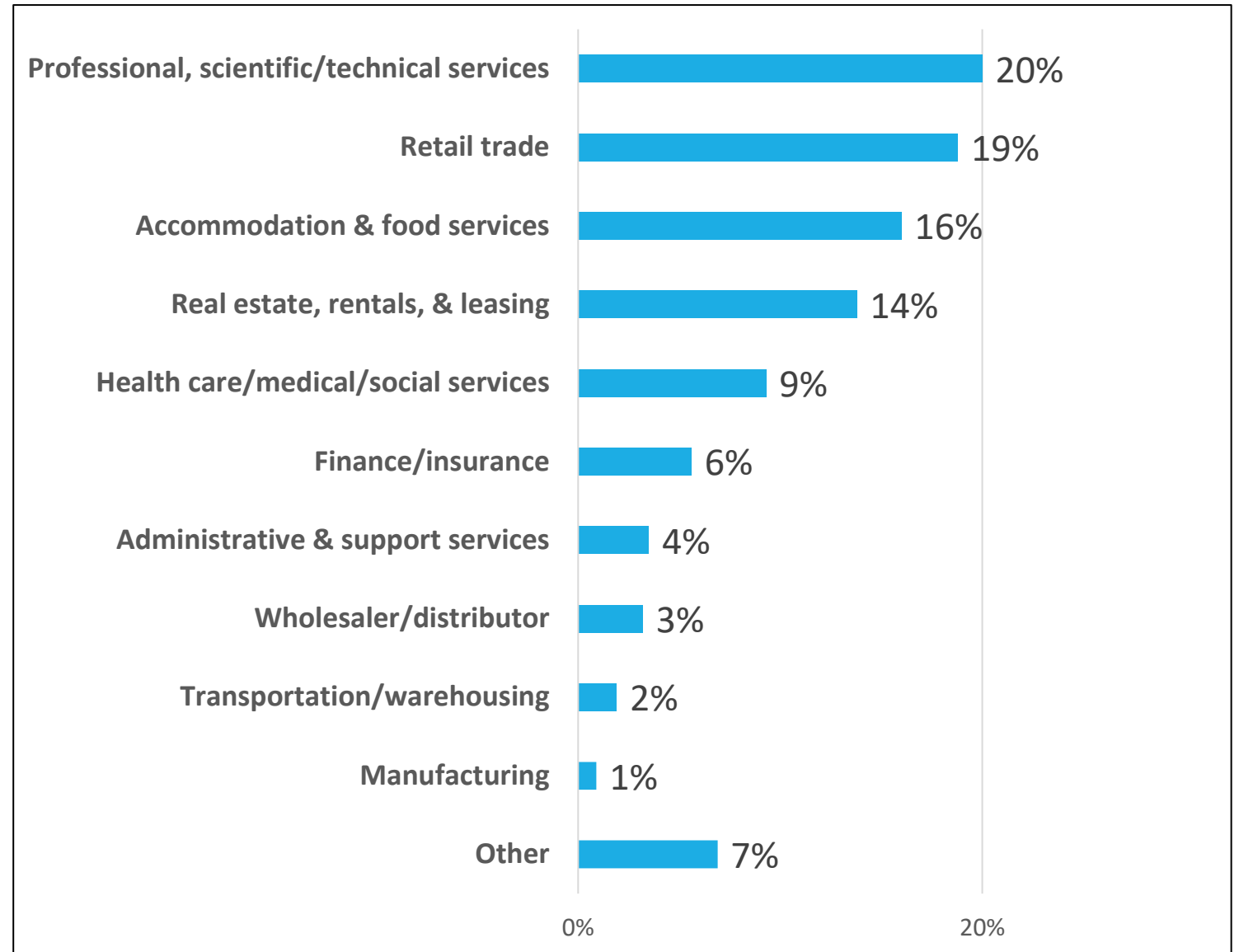
by percentage of respondents (excluding not provided)



■ 0-2 years ■ 3-5 years ■ 6-10 years ■ 11-20 years ■ 21+ years

All Types of
Businesses
Were
Represented in
the Survey

What Type of Business Is Your Establishment? by percentage of respondents

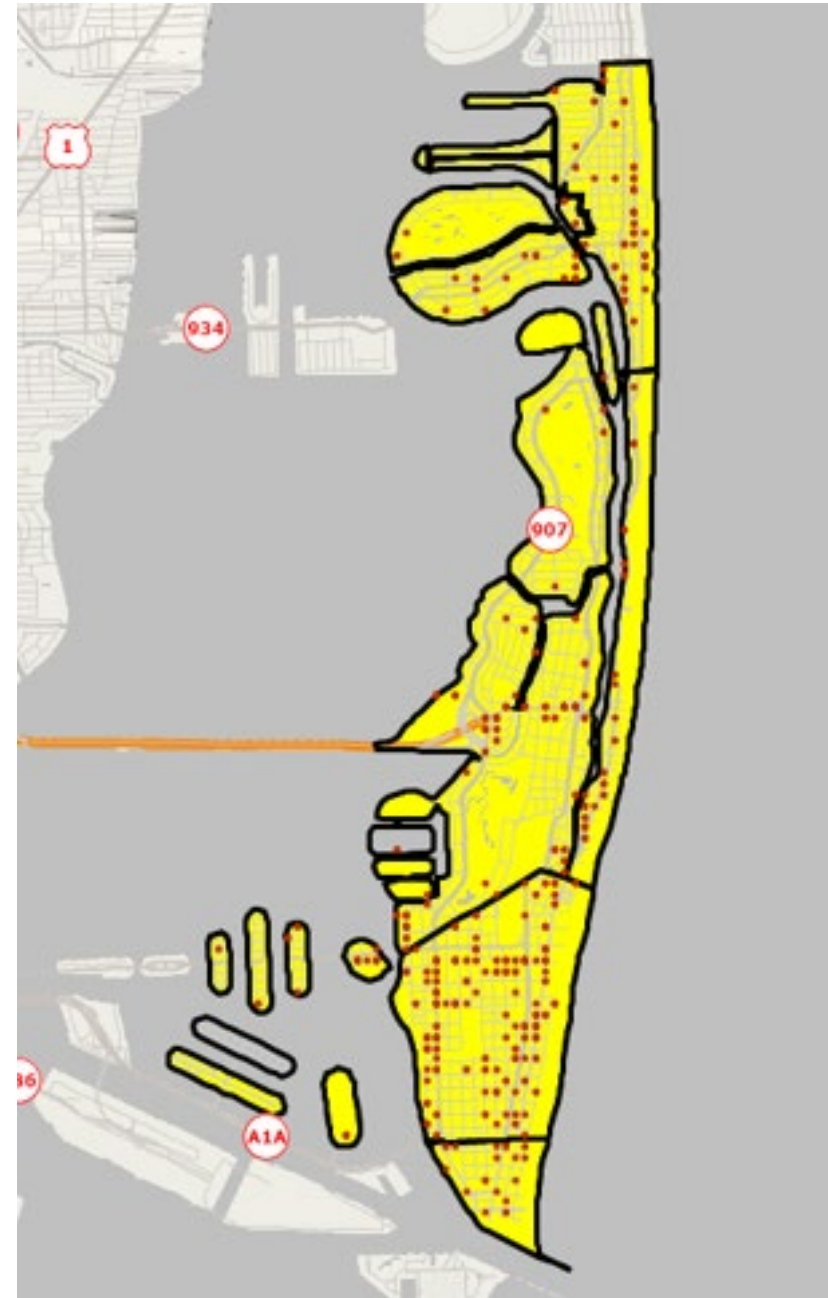


Location of *BUSINESS* Survey Respondents

Good representation of
responses throughout the City.

There were a total of 610.
respondents. The number by
area is provided below:

- 317 South Beach/South
Pointe
- 139 Midbeach
- 154 Condo Corridor/
Northbeach



Miami Beach 2024 Business Survey Respondents

Things to Remember



1. **Perceptions of the City's Image and Efforts to Prevent Crime Have Improved Significantly**
2. **Satisfaction with City Services Has Increased Significantly**
3. **Residents and Business Leaders Feel Much Safer than They Did 2 Years Ago**
4. **Ratings for Customer Service by City Employees Have Increased Significantly**
5. **Miami Beach is Setting the Standard for the Delivery of Many City Services**
6. **Top Opportunities for Improvement:**
 - Efforts to address homelessness
 - Stormwater management
 - Cleanliness of streets & canals/waterways
 - Street and sidewalk improvements

Perceptions of the City's Image and Efforts to Prevent Crime Have Improved Significantly

THINGS TO REMEMBER #1

RESIDENT SURVEY

Biggest Increases

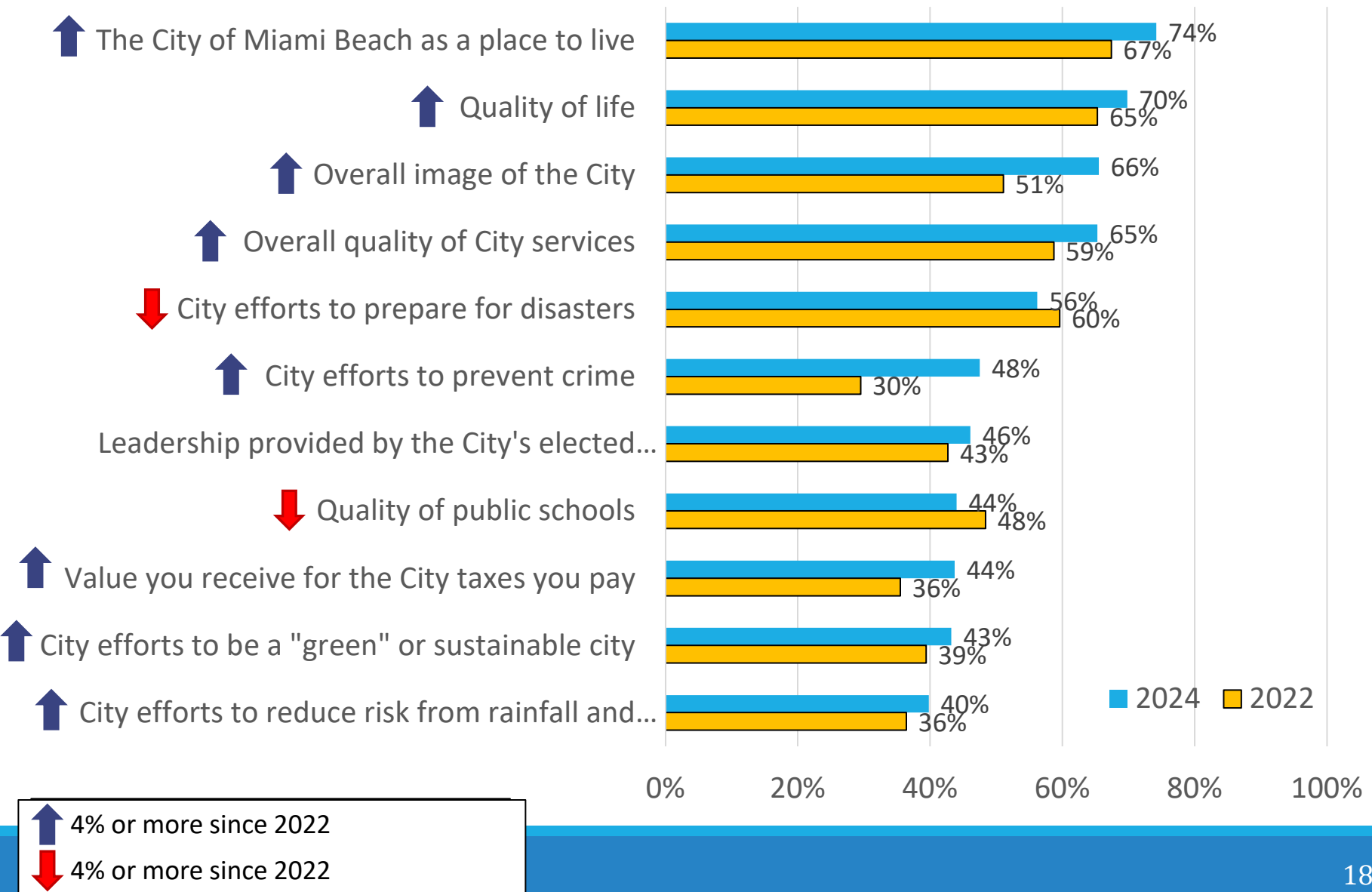
- Efforts to Prevent Crime (+18%)
- Image of the City (+15%)
- Value for City Taxes and Fees (+8%)
- Overall Satisfaction with City Services (+6%)

Biggest Decreases

- Quality of Public Schools (-4%)
- Efforts to Prepare for Disasters (-4%)

Resident Perceptions of the City Have Improved!

% of Resident Who Were Very Satisfied/Satisfied



BUSINESS SURVEY

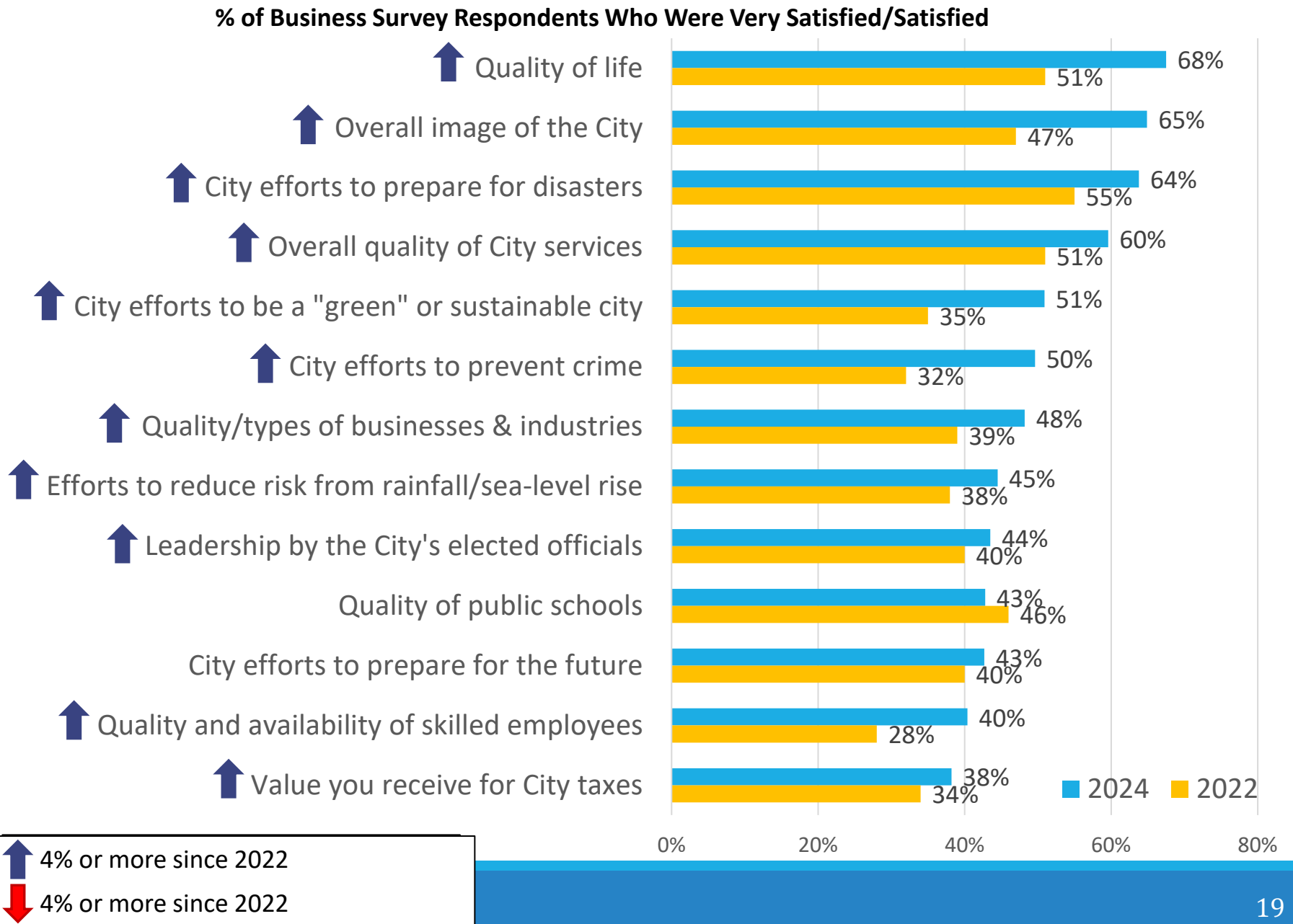
Biggest Increases

- Efforts to Prevent Crime (+18%)
- Image of the City (+18%)
- Quality of Life (+17%)

Significant Decreases

- None

Business Perceptions of the City Have Also Improved!



Satisfaction with City Services Has Increased Significantly

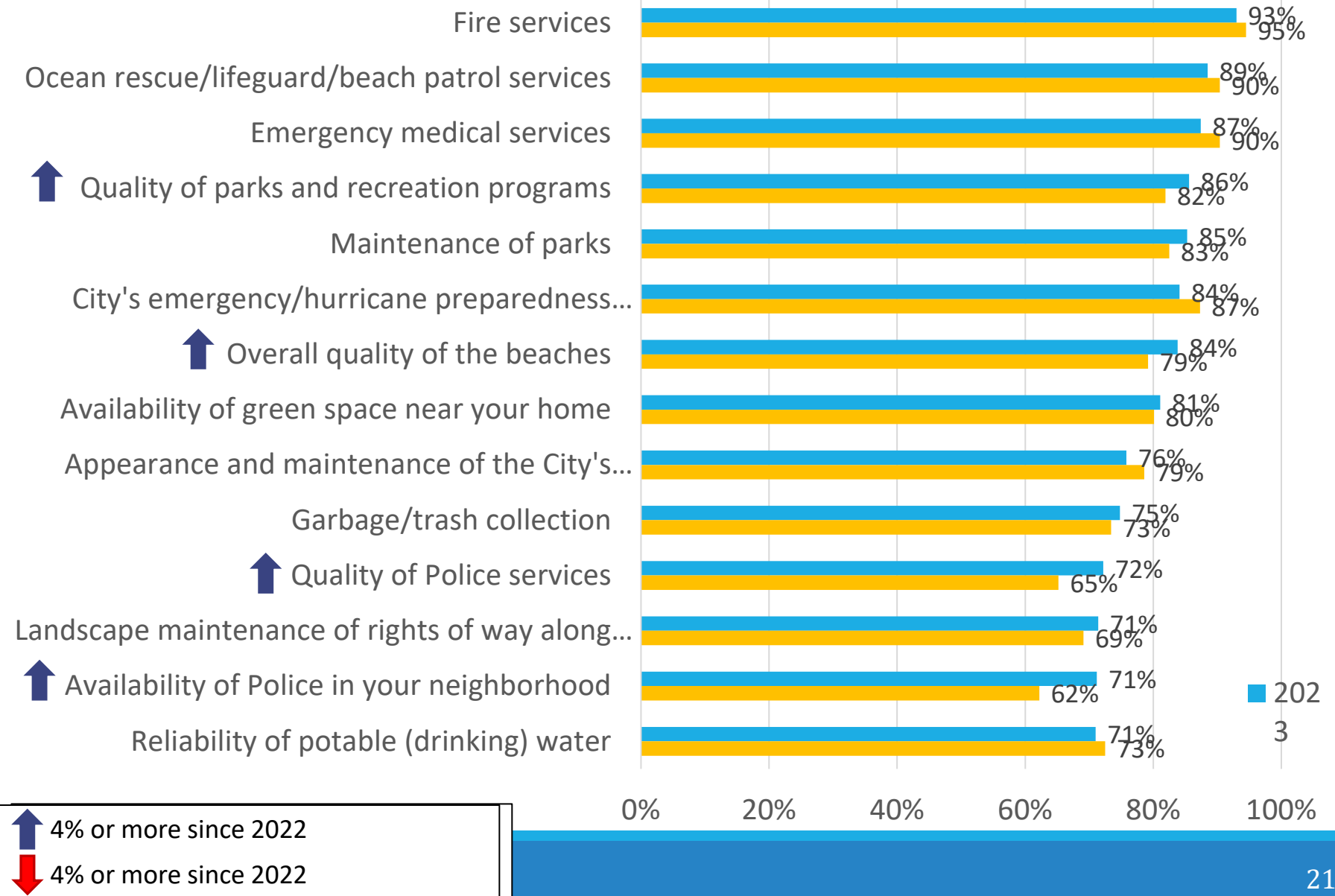
THINGS TO REMEMBER #2

RESIDENT SURVEY

Satisfaction
Increased
Significantly in
14 of 29 Major
Categories
Assessed

Only 2 Areas
Decreased
Significantly

Resident Satisfaction with Major City Services Highest Rated Items (2024 vs 2022)



RESIDENT SURVEY

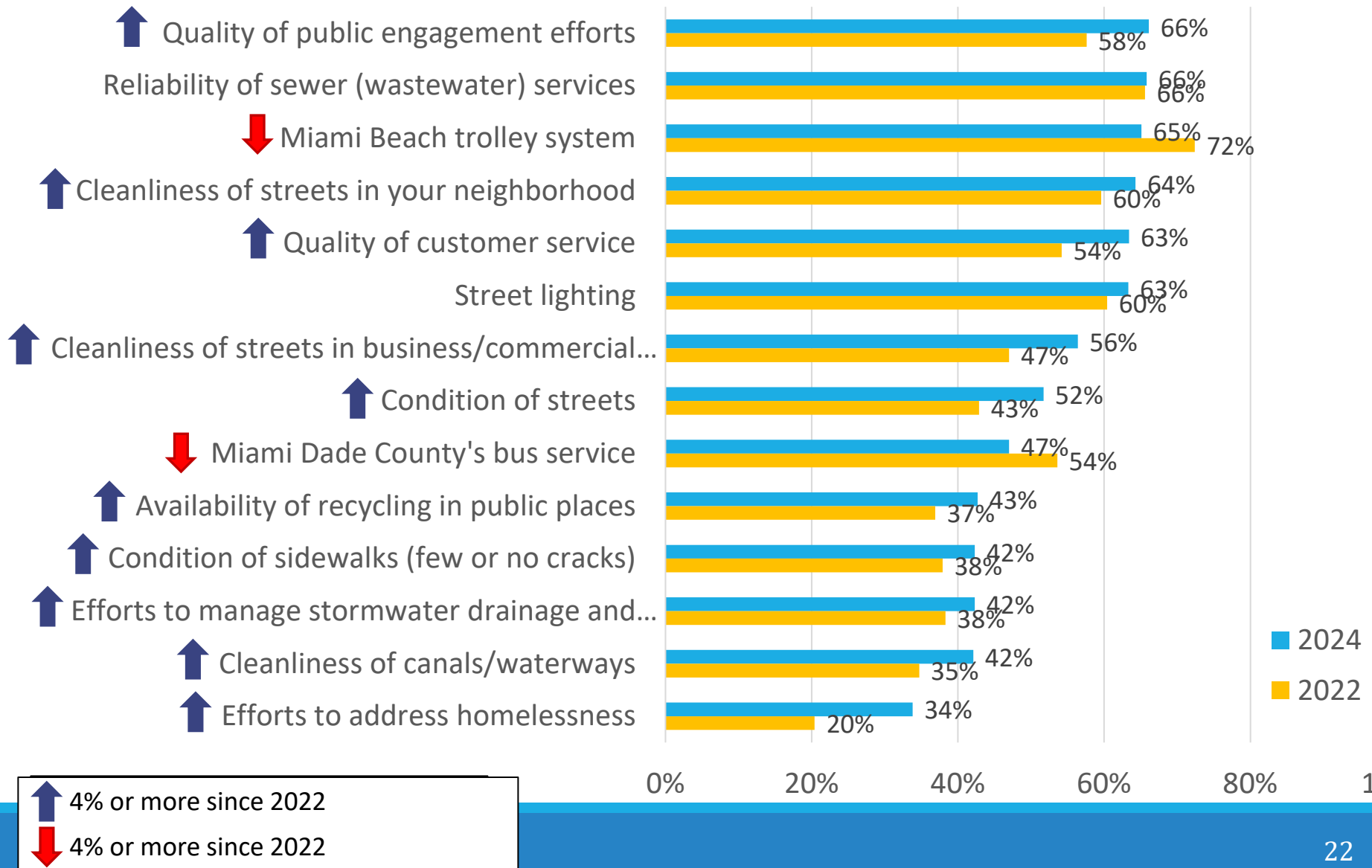
Biggest Increases

- Efforts to address homelessness (+14%)
- Cleanliness of streets in business/commercial areas (+9%)
- Quality of customer service (+9%)
- Availability of police in your neighborhood (+9%)
- Condition of streets (+9%)
- Quality of public engagement efforts (+8%)
- Cleanliness of canals/ waterways (+7%)
- Quality of police services (+7%)

Biggest Decreases

- MD County Bus Service (-7%)
- MB Trolley Service (-7%)

Resident Satisfaction with Major City Services Lowest Rated Items (2024 vs 2022)

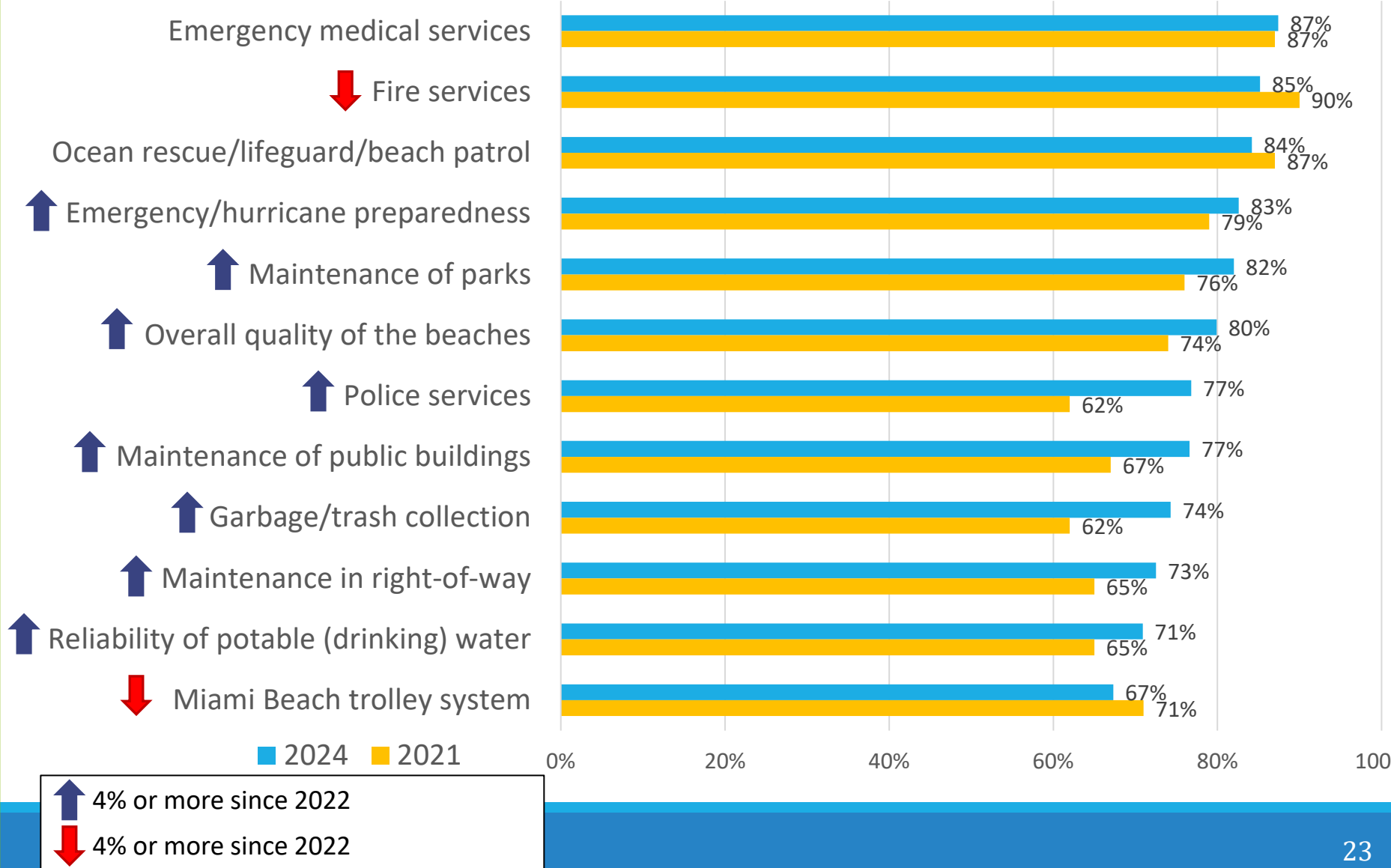


BUSINESS SURVEY

Satisfaction
Increased
Significantly in
15 of 23 Major
Categories
Assessed

Only 2 Areas
Decreased
Significantly

% Excellent/Good
Business Satisfaction with Major City Services
Highest Rated Items (2024 vs 2022)



BUSINESS SURVEY

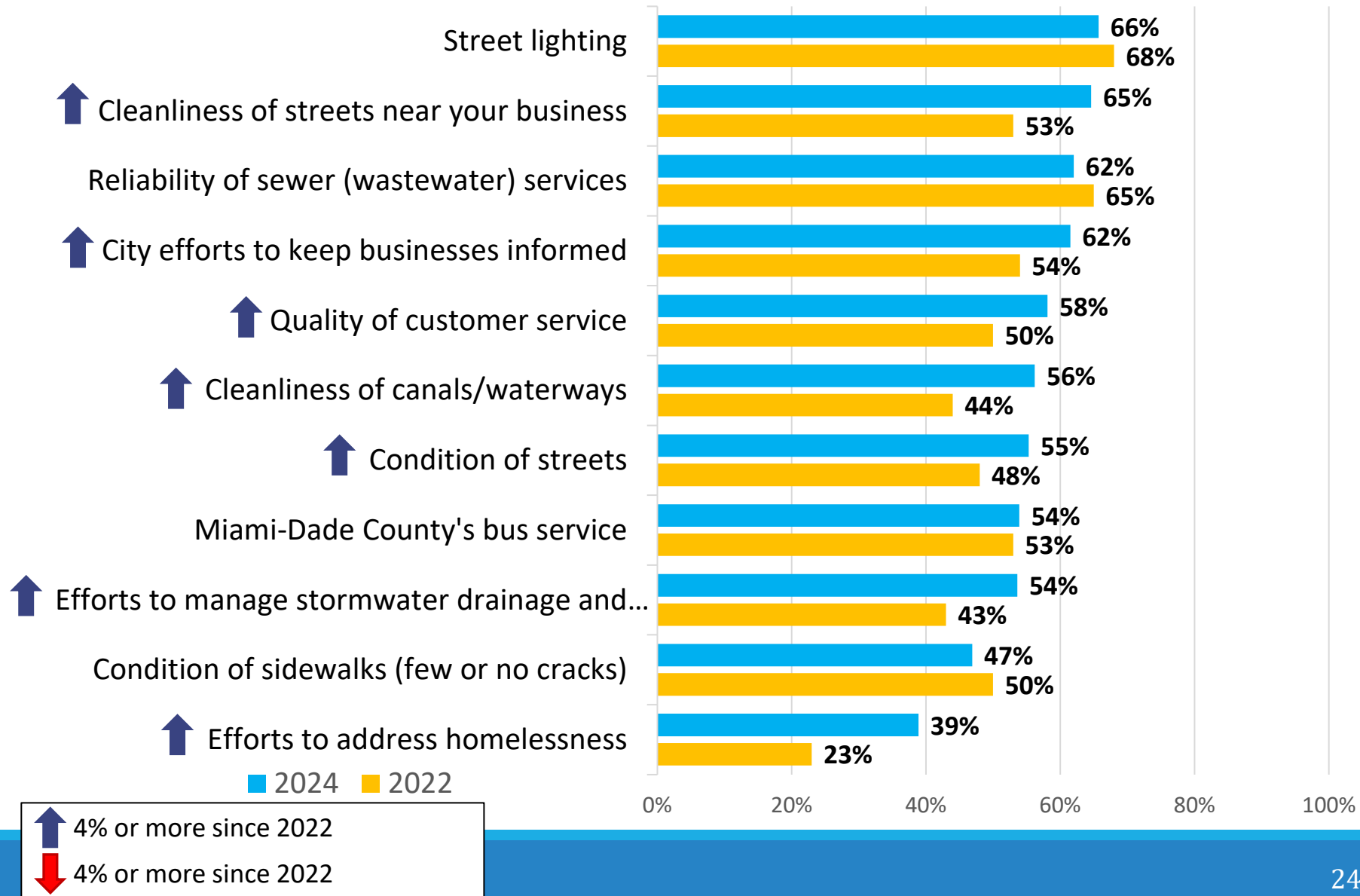
Biggest Increases

- Efforts to Address Homelessness (+16%)
- Police Services (+15%)
- Cleanliness of Streets (+12%)
- Garbage/trash collection (+12%)
- Cleanliness of Canals/ Waterways (+12%)
- Efforts to manage stormwater (+11%)

Biggest Decreases

- Fire services (-5%)
- MB Trolley Service (-4%)

Business Satisfaction with Major City Services Lowest Rated Items (2024 vs 2022)



Residents and Business Leaders Feel Much Safer than They Did 2 Years Ago

THINGS TO REMEMBER #3

RESIDENT SURVEY

Ratings for
Safety
Improved in
All Areas

Biggest Increases

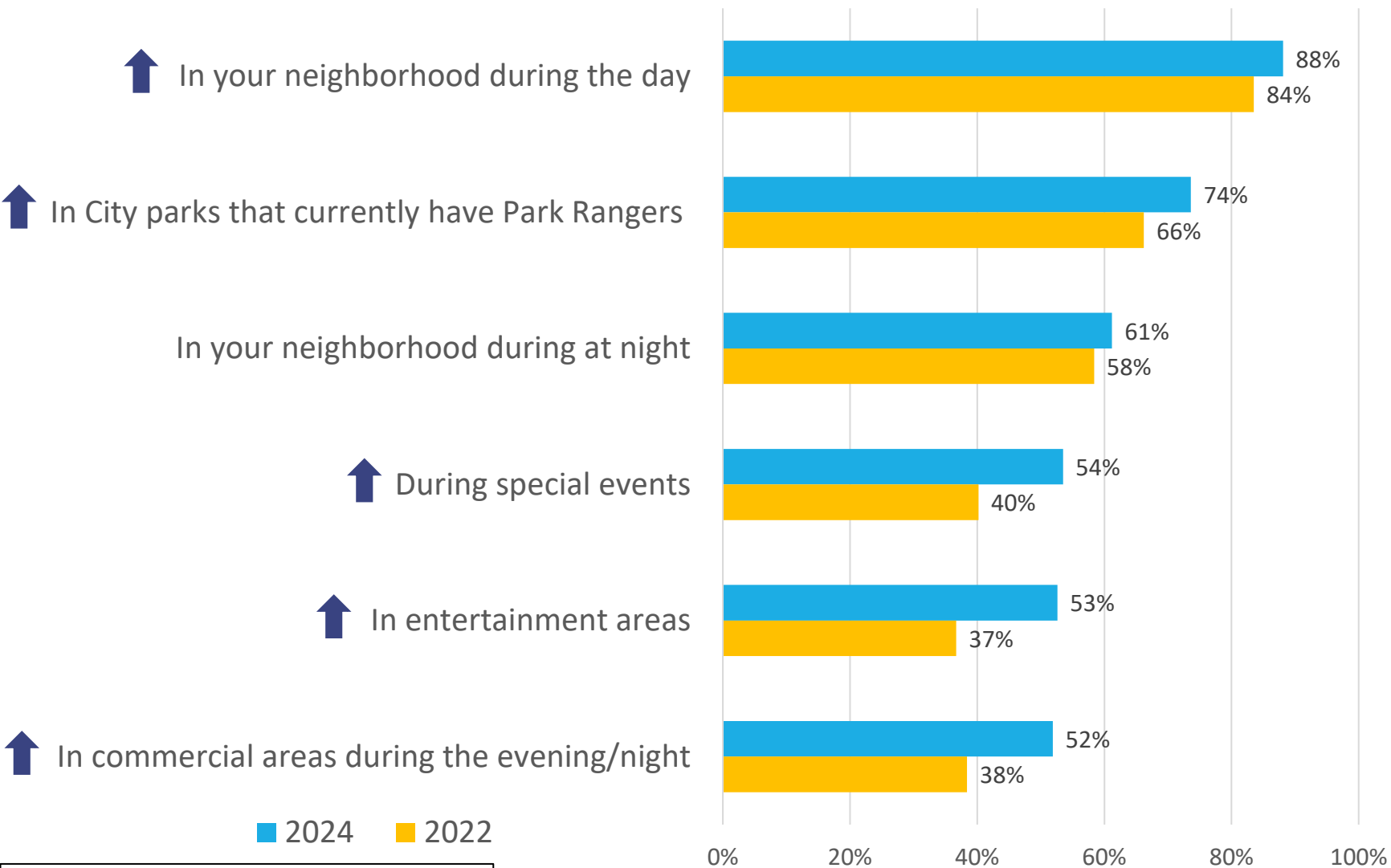
- In Entertainment Areas (+16%)
- In Commercial Areas During Evening/Night (+14%)
- During Special Events (+14%)

Biggest Decreases

- NONE

% Very Safe/Safe

How Safe Residents Feel



↑ 4% or more since 2022

↓ 4% or more since 2022

Impact of Spring Break Initiatives on Public Safety/Police Ratings

RESIDENT SURVEY				
Items rated	2022	2024 Wave 1 (Feb 15-Mar 13) N=741	2024 Wave 2 (Apr 10-30) N=559	2024 Total
% who felt very safe or safe during special events	40%	46%	+18	64%
% who felt safe or very in entertainment areas	37%	45%	+19%	64%
% who felt safe in commercial areas during the evening/at night	38%	46%	+15%	61%
% who rated the overall quality of police services as excellent or good	65%	69%	+6%	75%

BUSINESS SURVEY

Ratings for
Safety
Improved in
All Areas

Biggest Increases

- During Special Events (+21%)
- In and Around Your Business at Night(+18%)

Biggest Decreases

- NONE

How Safe Business Leaders Feel

% Very Safe/Safe



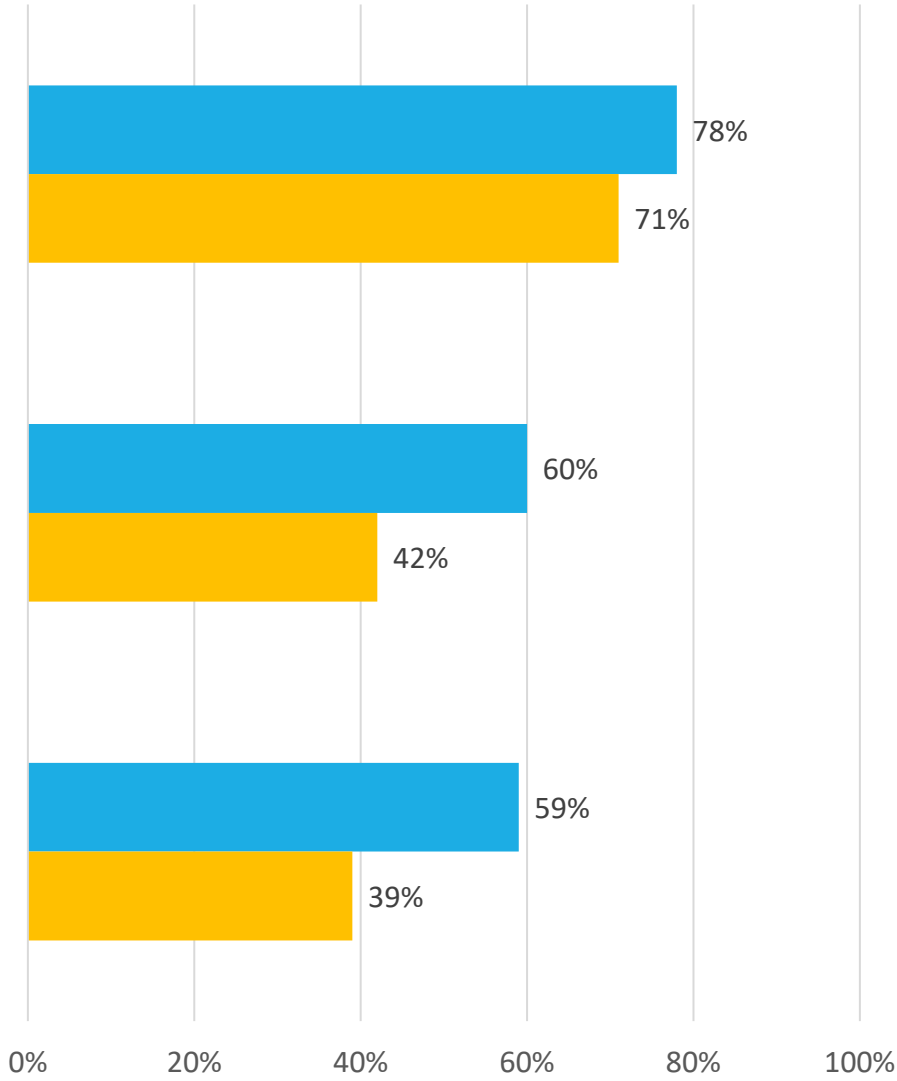
In and around your place of business during the daytime



In and around your place of business during the evening/night



During special events



2024 2022



4% or more since 2022



4% or more since 2022

Impact of Spring Break Initiatives on Public Safety/Police Ratings

BUSINESS SURVEY				
Items rated	2022	2024 Wave 1 (Feb 15-Mar 13) N=293	2024 Wave 2 (Apr 10-30) N=317	2024 Total
% who felt very safe or safe in and around their place of business during the daytime	71%	76%	+3	79%
% who felt safe or very in and around your place of business during the evening/night	42%	58%	+4%	62%
% who felt safe during special events	38%	54%	+9%	64%
% who rated the overall quality of police services as excellent or good	62%	72%	+10%	82%

Ratings for Customer Service By City Employees Have Increased Significantly

THINGS TO REMEMBER #4

RESIDENT SURVEY

Resident Ratings for Customer Service Improved in All Areas

Biggest Increases

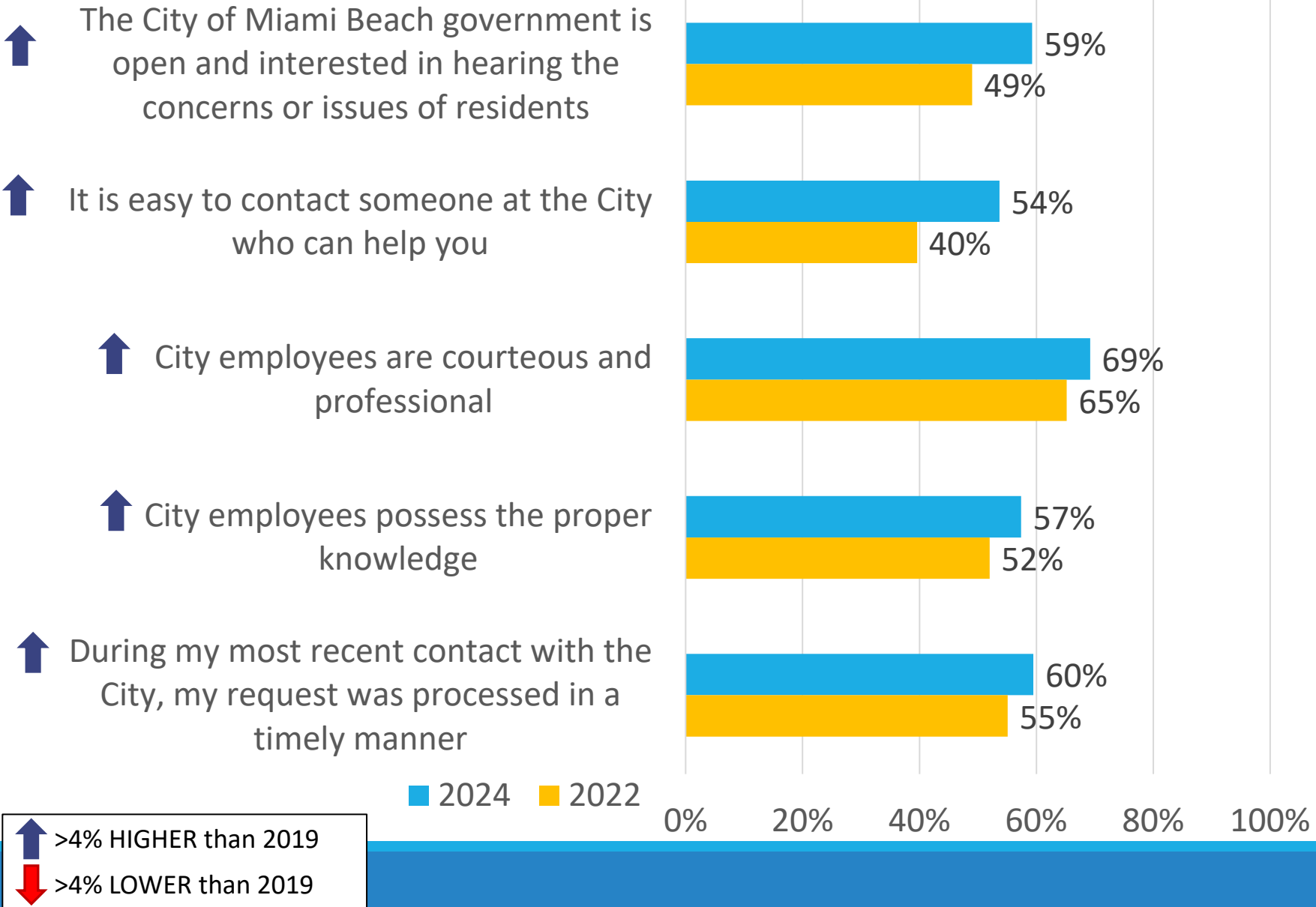
- How easy it is to contact someone at the city (+14%)
- Ratings of the City's Efforts to Listen to Resident Concerns (+10%)

Biggest Decreases

- NONE

% Strongly Agree/Agree

Level Of Agreement With Customer Service



BUSINESS SURVEY

Resident Ratings for Customer Service Improved Most Areas

Biggest Increases

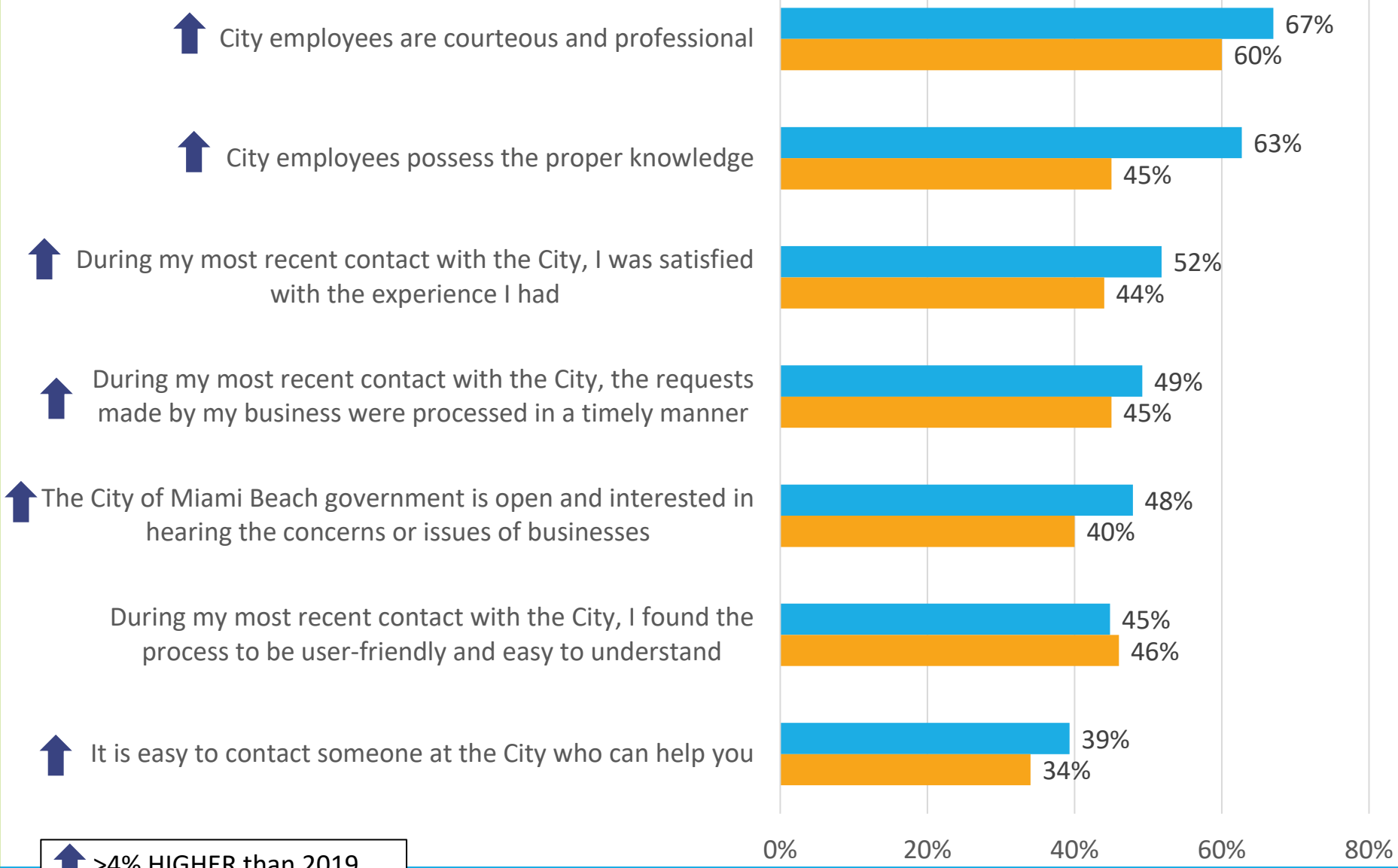
- City employees possess proper knowledge (+18%)
- City is open/interested in hearing concerns/issues of businesses (+8%)
- I was satisfied with my experience (+8%)

Biggest Decreases

- NONE

Level of Agreement With Customer Service

% Strongly Agree/Agree



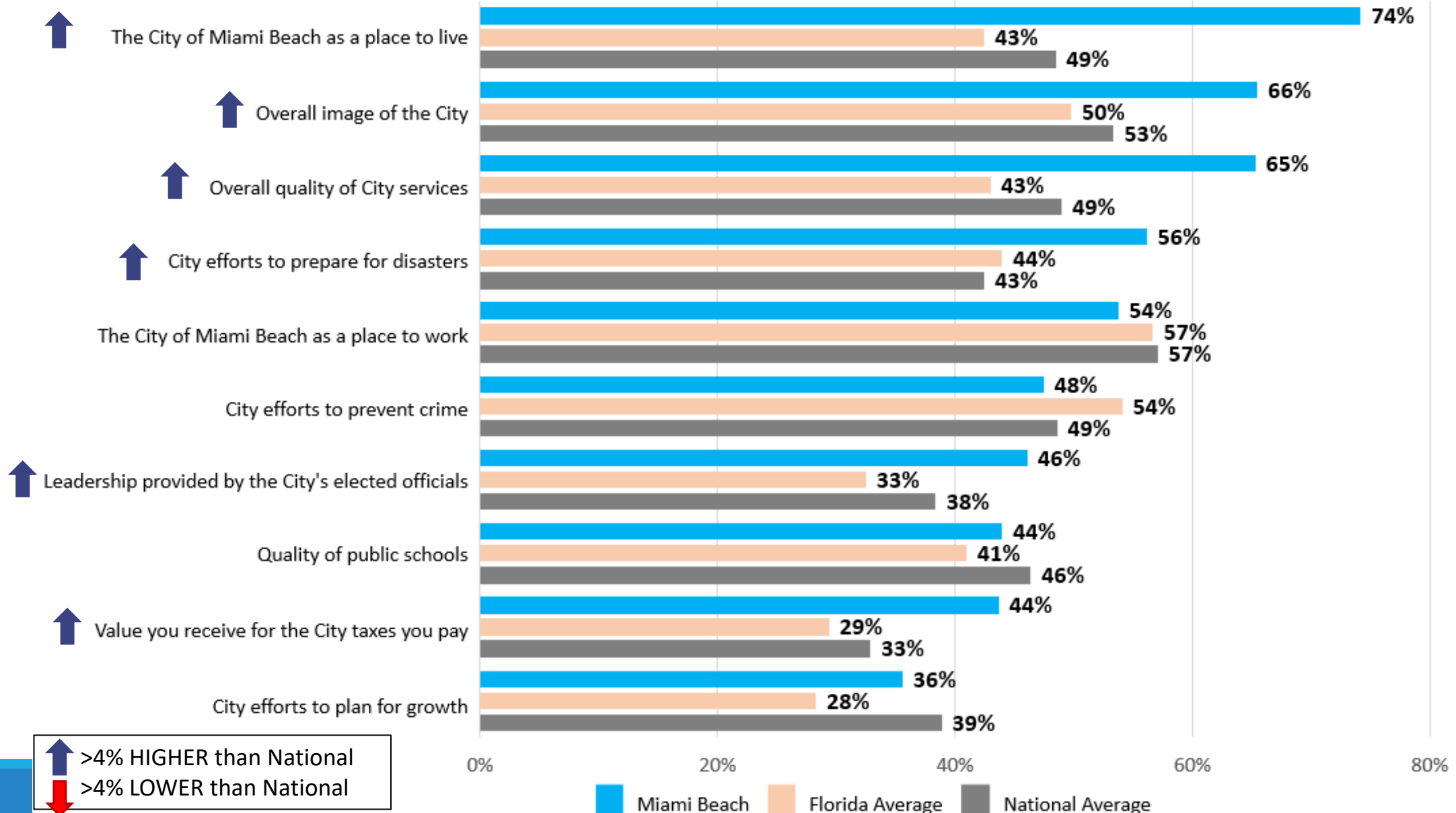
↑ >4% HIGHER than 2019
↓ >4% LOWER than 2019

Miami Beach is Setting the Standard for the Delivery of Many City Services

THINGS TO REMEMBER #5

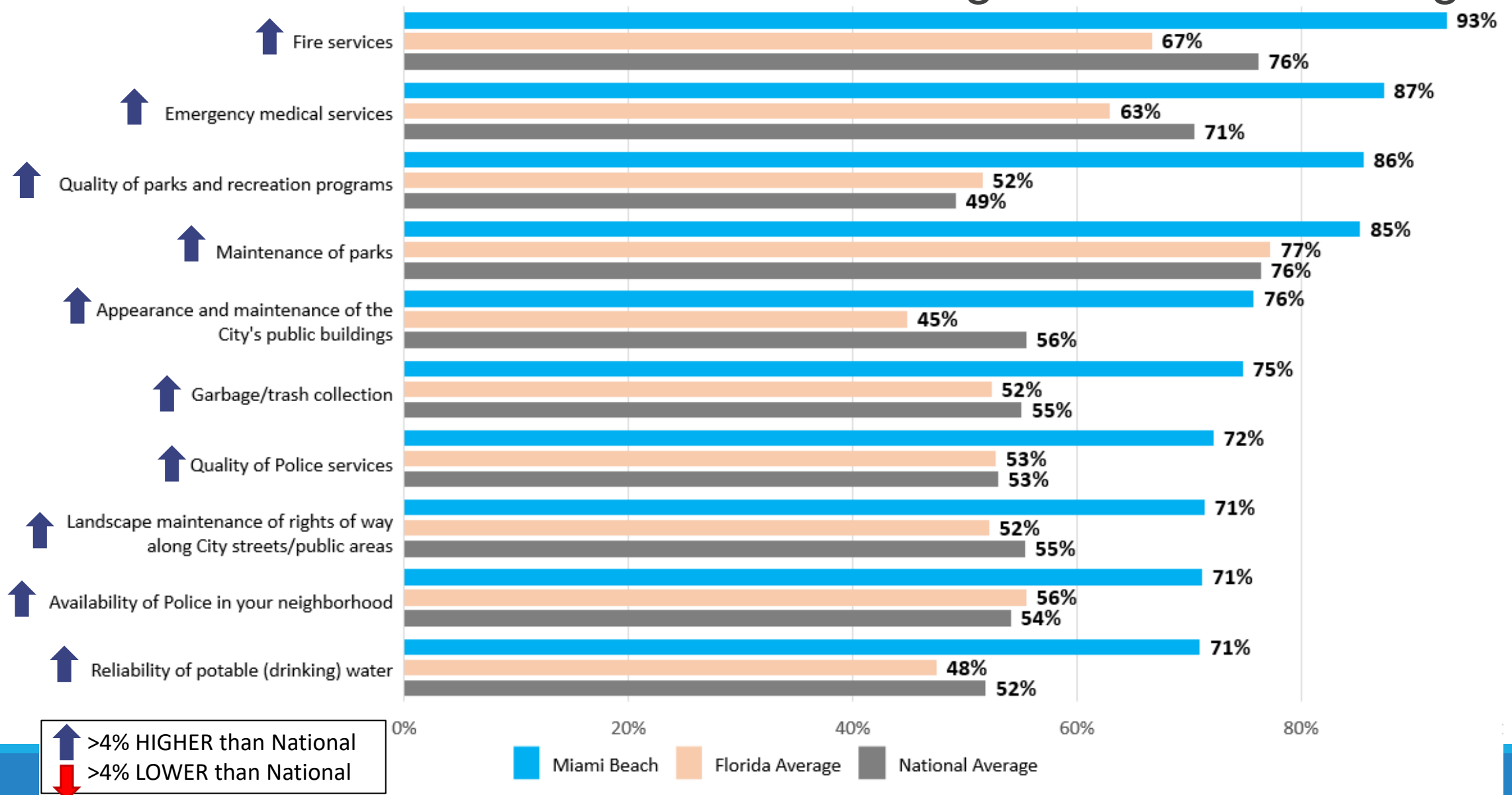
Perceptions of the City

Miami Beach Resident vs Florida Average vs National Average



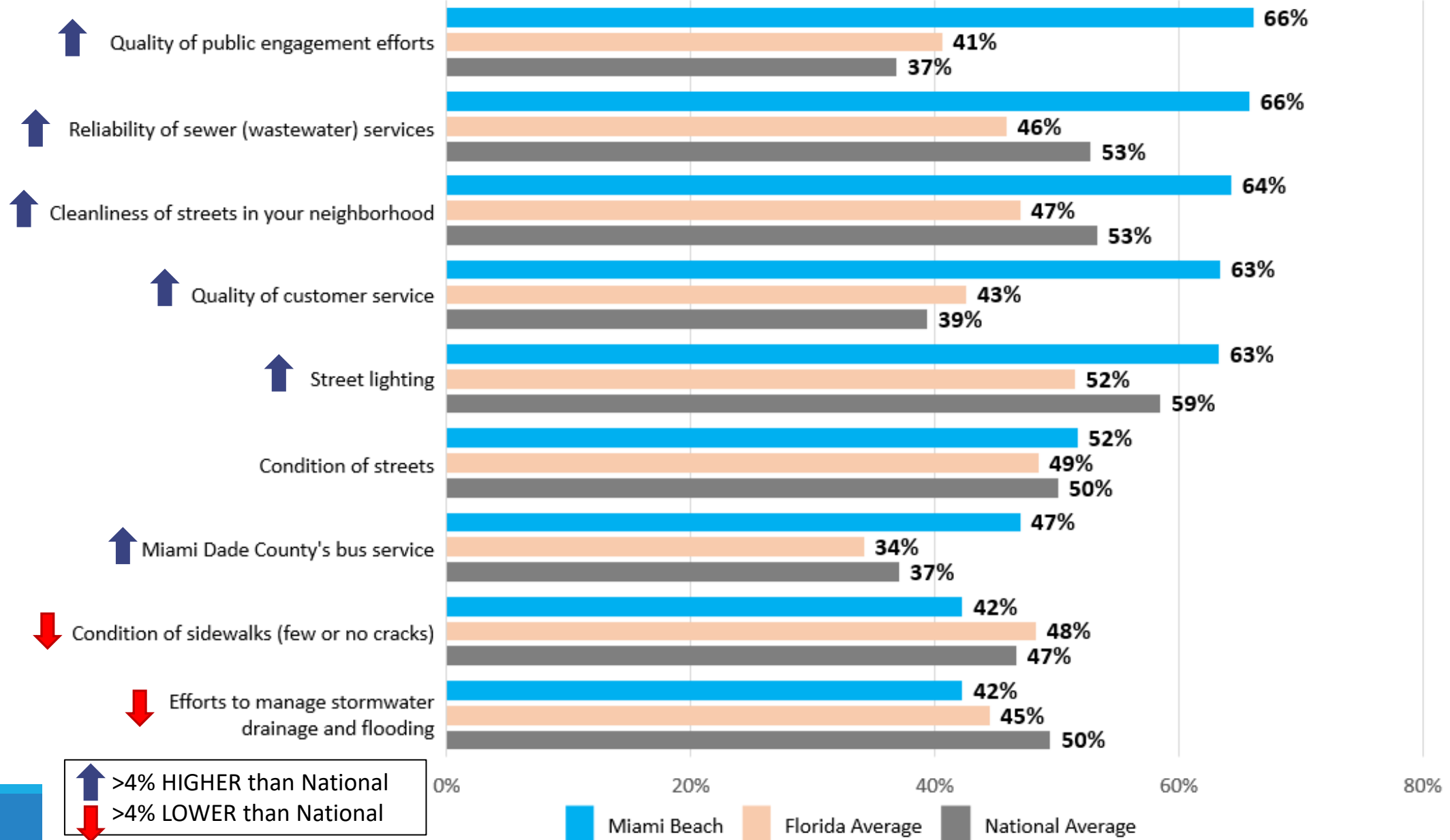
Satisfaction with Major City Services

Miami Beach Resident vs Florida Average vs National Average



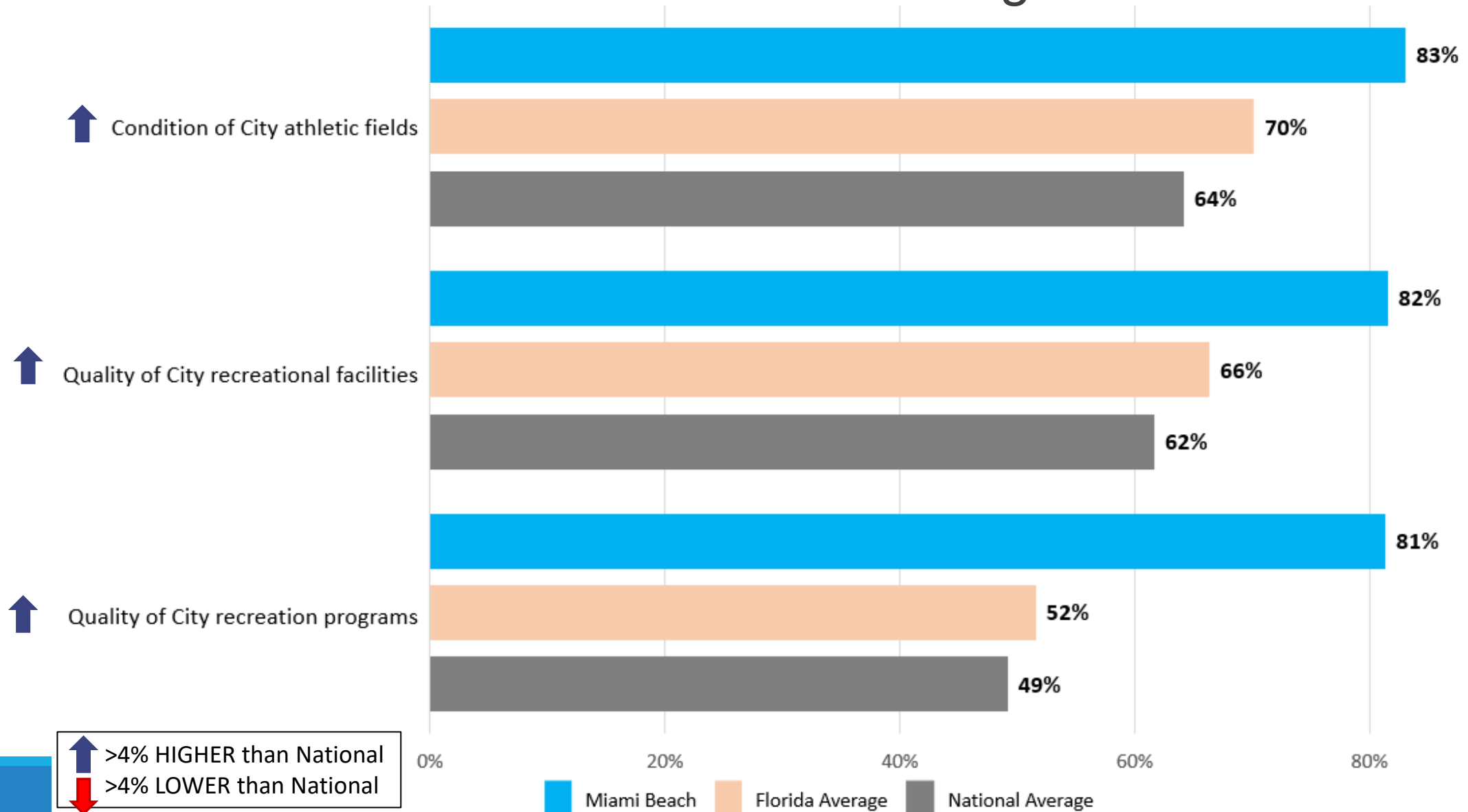
Satisfaction with Major City Services (continued)

Miami Beach Resident vs Florida Average vs National Average



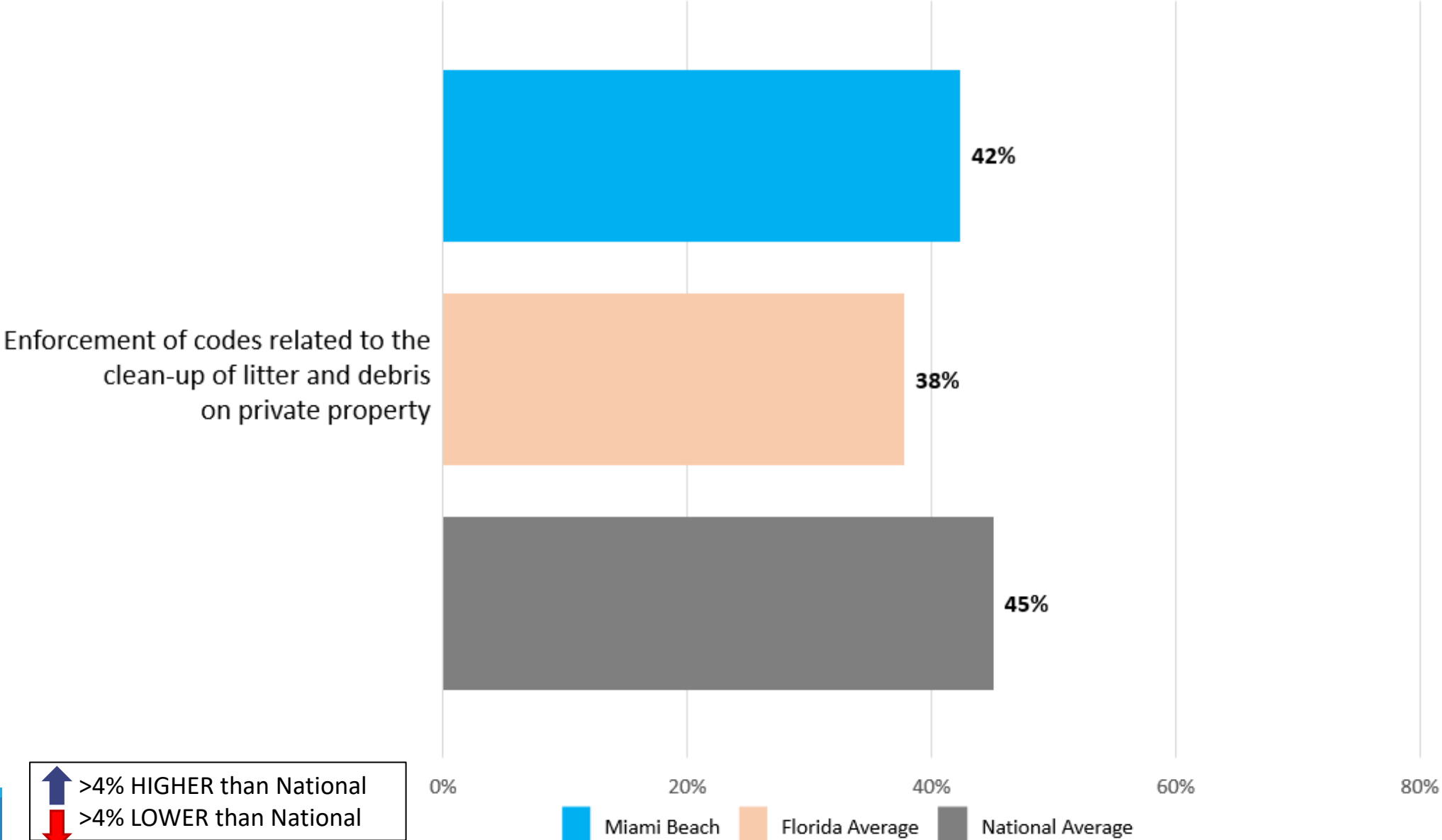
Parks and Recreation

Miami Beach Resident vs Florida Average vs National Average



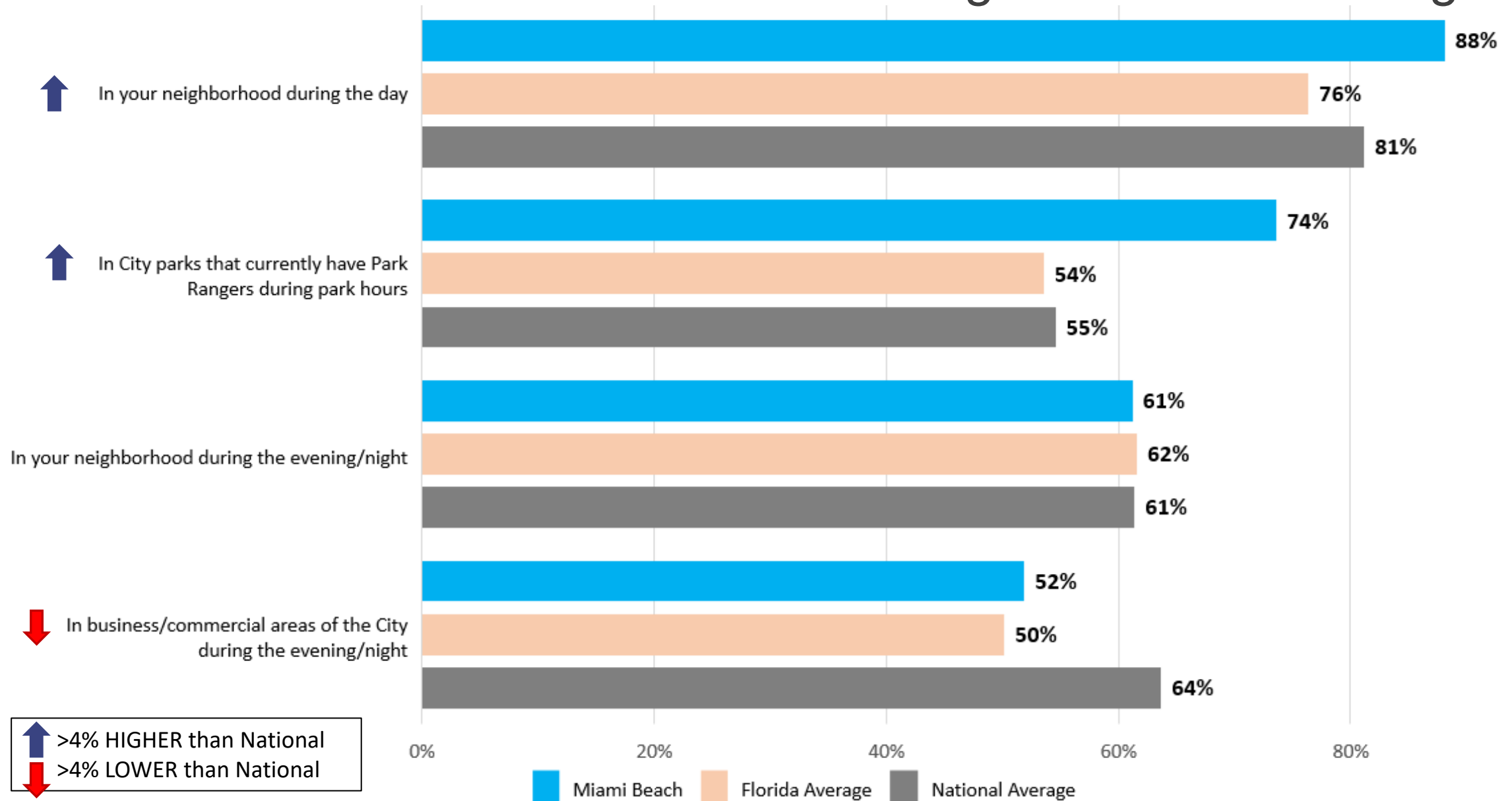
Cleanliness of the City

Miami Beach Resident vs Florida Average vs National Average



Percentage of Residents Who Feel Very Safe/Safe

Miami Beach Resident vs Florida Average vs National Average

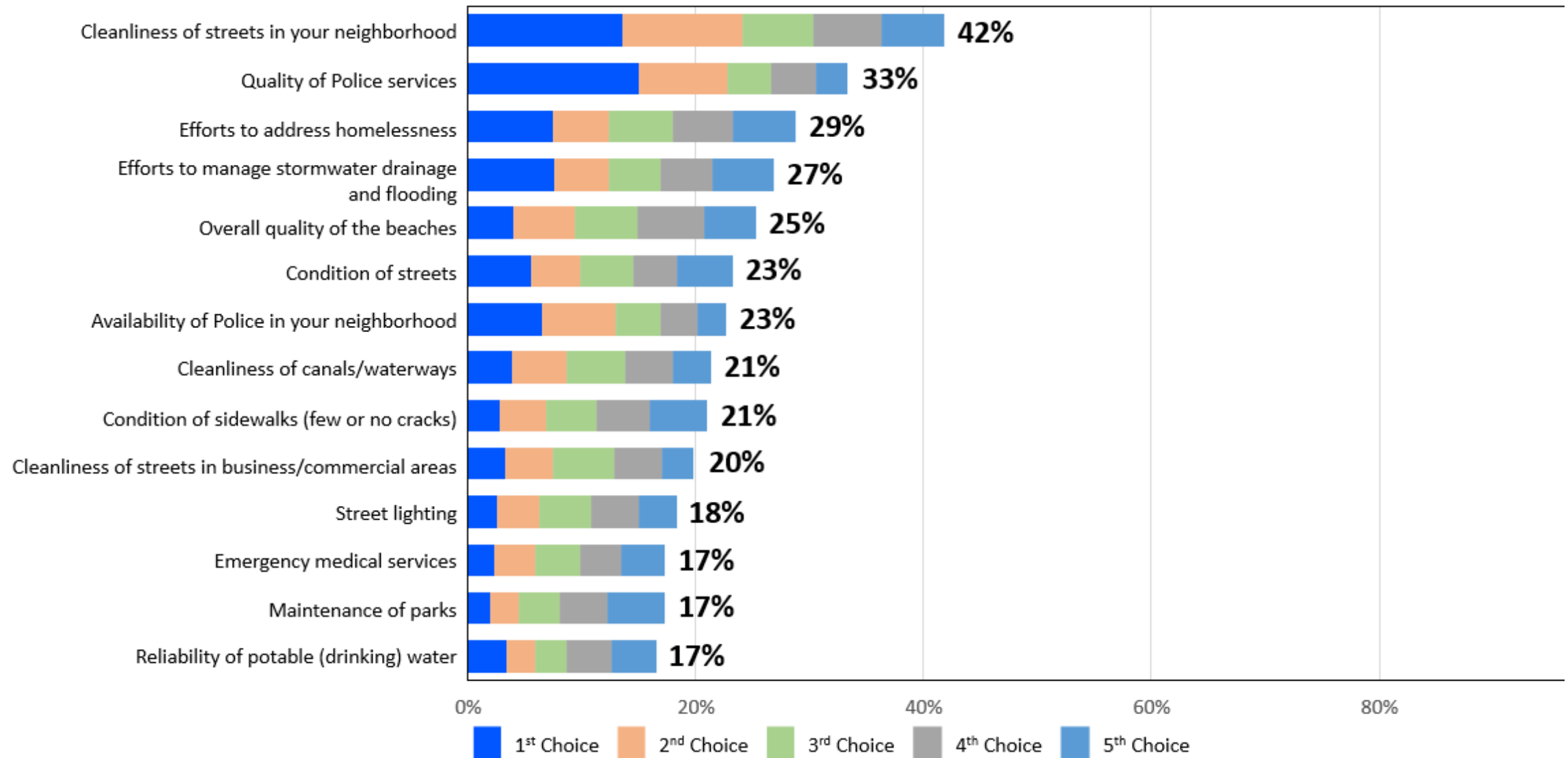


There Are Opportunities for Improvement

THINGS TO REMEMBER #5

City Services That Are Most Important For The City To Provide: Top 14

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



Importance-Satisfaction Ratings						
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (I-S = 0.10-0.20)						
Efforts to address homelessness	28.8%	3	33.8%	28	0.1907	1
Efforts to manage stormwater drainage and flooding	26.9%	4	42.3%	26	0.1552	2
Cleanliness of streets in your neighborhood	41.8%	1	64.3%	18	0.1492	3
Cleanliness of canals/waterways	21.3%	8	42.1%	27	0.1233	4
Condition of sidewalks (few or no cracks)	21.0%	9	42.3%	25	0.1212	5
Condition of streets	23.3%	6	51.7%	22	0.1125	6

Among 29 major categories of city services that were assessed, the top 6 opportunities for improvement to enhance overall satisfaction with City services are listed above.

Cleanliness-Related Should Continue Be Considered as Lower-Cost Opportunities. ←

Stormwater Drainage and Sidewalk Ratings Are Below the National Average ←

Summary



Things to Remember

1. **Perceptions of the City's Image and Efforts to Prevent Crime Have Improved Significantly**
2. **Satisfaction with City Services Has Increased Significantly**
3. **Residents and Business Leaders Feel Much Safer than They Did 2 Years Ago**
4. **Ratings for Customer Service by City Employees Have Increased Significantly**
5. **Miami Beach is Setting the Standard for the Delivery of Many City Services**
6. **Top Opportunities for Improvement:**
 - Efforts to address homelessness
 - Stormwater management
 - Cleanliness of streets & canals/waterways
 - Street and sidewalk improvements

Questions?

THANK YOU!