

CITY OF SUNNY ISLES BEACH REBRANDING:

Research Report and Strategic Analysis



JACOBBER CREATIVE



PREPARED MARCH 8, 2021



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Introduction

In 2019 the City of Sunny Isles Beach embarked on a comprehensive rebranding campaign for the municipal government. The intention is the consolidation of residential, employee, and stakeholder insights that can inform the creation of a uniform brand identity and communication strategy, reflecting the evolution of the community and priming it for future growth.

Although the City was officially incorporated in 1997, there has never been a formal or cohesive place brand identity established.

Place branding consists of selecting all the positive aspects of a location, and then differentiating it from other similar one to promote a new image. For this project, the aim is to link the perceived identity of the City of Sunny Isles Beach, and updating it with recommendations and actions that can improve and refresh the brand, and thus differentiate the City from neighboring communities. Ultimately, a successful brand will help in highlighting the good qualities and benefits that are associated with the City of Sunny Isles Beach, as well as act as a major draw for prospective businesses, residents and visitors.

The rebranding process is split into two distinct phases: the collection of data and insights for the Market Research Phase, and the Brand Development and Execution Phase. This document covers the reporting and learnings from the first phase of research and discovery process.

Objectives

The overall objective of this study was to conduct comprehensive research and develop a branding strategy that effectively positions the City of Sunny Isles Beach as a choice destination for residents and businesses within the South Florida landscape.

A major component of the brand strategy involves gathering and analyzing data on the City's growth trajectory, and creating a brand identity that reflects its evolution to a more modern, sophisticated, and forward-leaning community.

At the outset of this study, Jacober Creative met with City officials to establish branding and research objectives. An additional meeting with the Public Arts Advisory Committee furthered the collection of insights among internal stakeholders. At these kickoff meetings, it was important to gather insights from individuals working in diverse areas of the municipal government, to hear their perspectives on the history of the City and the vision for its branding, and confirm the objectives which would largely inform the direction of the research.

At the same time, significant emphasis was placed on obtaining input from a broad sample of the residential community. The goal was to better position the City of Sunny Isles Beach's brand as one that fosters community input and engagement, and reflects its growing diversity. Ultimately, the main objective is to create a deliberate, thoughtful, and unified brand identity that reflects the community it serves and inspires enduring civic pride.

1. To create a unified brand identity that reflects the evolution of the city and its future growth.
2. To connect the local government with the community it serves.
3. To inspire resident engagement with the city, both in-person and online.
4. To attract potential businesses and investors to the area.
5. To position the City of Sunny Isles Beach as a safe, responsive, and sought-after community to prospective residents looking to establish long-term roots.

"The goal of this re-branding campaign is to create a unified and identifiable look that residents can connect with, businesses want to work with, and employees are proud to represent."



SWOT Analysis

The City of Sunny Isles Beach is an oceanfront community located on a barrier island in Northeast Miami-Dade County. The City is bordered by the Atlantic Ocean to the east and the Intracoastal Waterway to the west, and is intersected by Collins Avenue, the main north-south thoroughfare and commercial corridor of the city.



S

STRENGTHS

- Parks/Programs
- Staff
- Responsive Government
- Communication
- Events
- Beach
- Police Dept
- School
- Geography
- Municipal Funding
- New Architecture
- Outdoor Recreation
- Community Center
- Government

W

WEAKNESSES

- Traffic
- Limited Walkways
- Limited Bike Paths
- Control over local infrastructure
- High Rises
- Lack of Restaurants/Shops
- Lack of Space/Parking
- “Little Moscow”

O

OPPORTUNITIES

- Events
- Developments
- Diversity
- Technology
- Location
- “Little Moscow”

T

THREATS

- Untimely Responsiveness
- Growing Pains
- Flooding
- Beach Erosion
- Misinformation
- Business Turnover
- Short-Term Rentals

Methodology

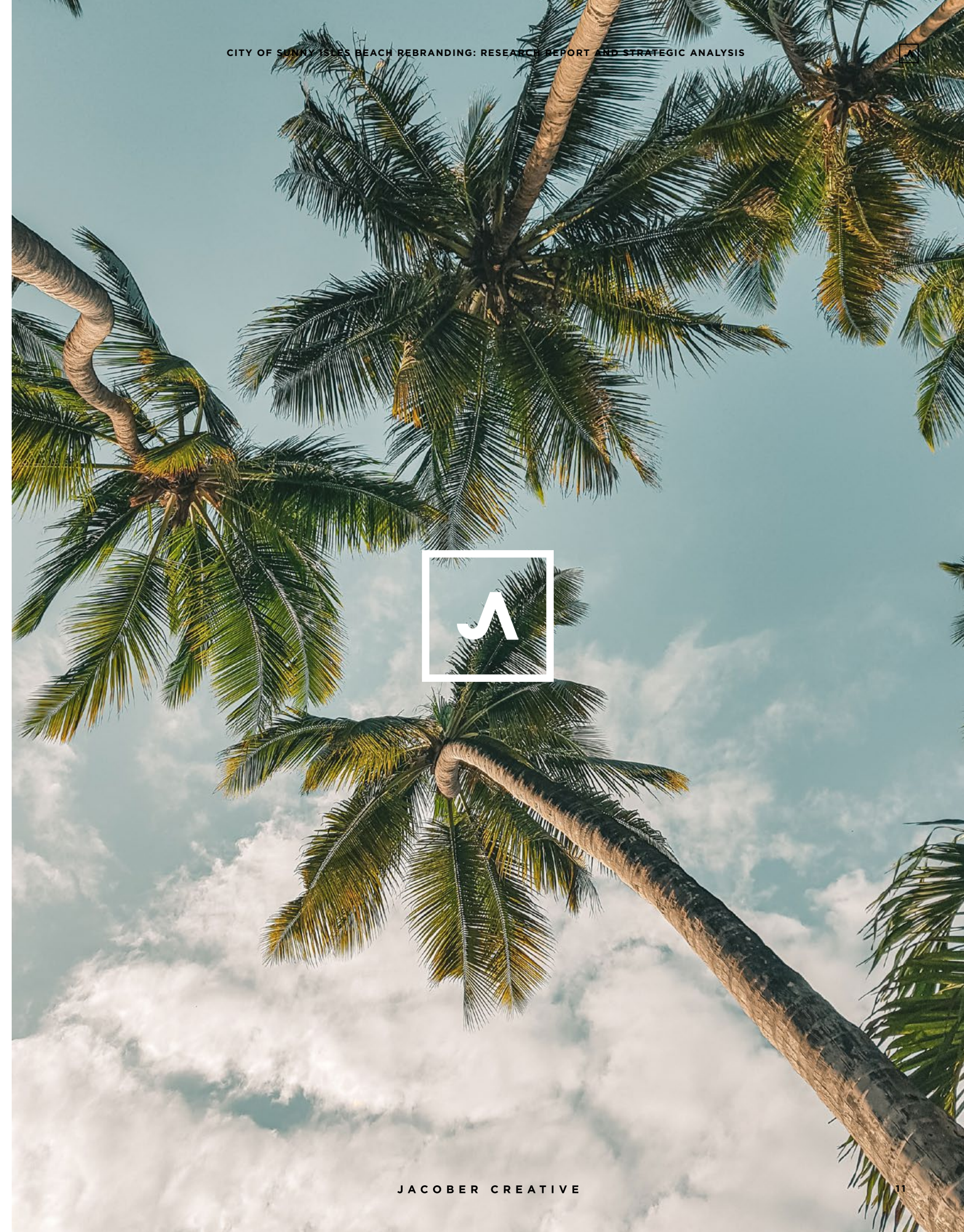
There were two elements of the original research initiative: *qualitative* research and *quantitative* data gathering. The qualitative research consisted of three distinct focus groups encompassing *City employees*, *local business owners* or operators, and *residents*.

Focus Groups

In order to accomplish the objectives of this project, three focus group sessions were conducted at the City of Sunny Isles Beach City Hall.

1. **January 21, 2020: The Employee Group conducted with 12 participants – (4 of the 12 were also residents).**
 - Employees were from varying departments including Cultural & Community Services, Code Compliance, Planning & Zoning, Human Resources, Information Technology, Finance, Public Works and Law Enforcement.
2. **February 13, 2020: The Business Group was conducted with 11 participants – (6 of the 11 were also residents).**
 - Businesses were varied – Office building owner & contractor, Real Estate Development, Management and Sales, Hotel and Residential Community Manager, Restaurant owner, dry cleaner, Community Organizers, Supermarket Retail and Water Sports lessons rentals and tours.
3. **February 13, 2020: The Residents Group was conducted with 10 participants.**
 - All Residents were from the west side of the City of Sunny Isles Beach.

After the focus groups were completed, The City of Sunny Isles Beach solicited feedback from additional members of the municipal government. *Four elected officials* and *five members of the Public Arts Advisory Committee (PAAC)* were asked to fill out questionnaires with the goal of obtaining insight into their opinions on some of the topics discussed in the three focus group sessions. Although not a formal focus group, their answers were compared and contrasted with the findings obtained from the three groups.



Quantitative Surveys

The quantitative portion of the study was conducted among 941 total participants including 631 surveys completed online and 310 telephone surveys.

A sample of 941 completed surveys represents a margin of error of +/- 3.2% at a 95% level of confidence within this population.

DATES: THIS SURVEY WAS FIELDED ONLINE AND BY TELEPHONE FROM SEPTEMBER 15, 2020 TO DECEMBER 1, 2020.

Method of Promotion: The list of residents selected for the phone survey was obtained from a purchased public phone list of residents of the City of Sunny Isles Beach, supplemented with additional numbers from the City's recreation and resident ID card database. The online surveys were promoted via the City's website, email and social media.

This study reports on what image residents, workers and businesses comprehensively have of the City of Sunny Isles Beach. Respondents to this survey answered questions regarding how they feel about the City, what name they most often use when referring to the City, positive words and positive emotions they had for describing the City, and overall characteristics of how they perceived the personality of the City. These questions and responses, as well as an exercise to identify colors most descriptive of the City and communication platforms most used to receive information, will assist Jacober Creative and the City in creating a representative and current brand that residents, workers, and visitors alike will associate with the City of Sunny Isles Beach.

EXAMPLES OF SURVEY PROMOTIONS

Have You Taken Our Online Survey?

If you didn't get a chance to respond to our phone survey, here's another opportunity to share your thoughts. Don't miss out on sharing your opinions about Sunny Isles Beach, its brand and the future!

[SIBFL.NET/REBRANDING](https://sibfl.net/rebranding)

Don't Forget to Take Our Online Survey

Your input will help us shape the future of Sunny Isles Beach, its brand and the future. Take our survey today to share your opinions! The survey is available in multiple languages!

[SIBFL.NET/REBRANDING](https://sibfl.net/rebranding)

Research Findings

Qualitative Research: Focus Groups

BRANDING RECALL:

Employees, Business and Residents have strong and warm feelings for the City where they live and/or work.

None of the three segments could play back a clear image of the City of Sunny Isles Beach.

There was some recollection of previous attempts – “World Class City”, “Florida’s Riviera”, “The City of Sun and Sea” etc. – but none were universal, and all failed to generate excitement in a City they are clearly happy to be a part of.



When probed, most believed the City Seal was the City's logo.

While the discussion on the logo was brief, those who expressed an opinion wanted something that “unifies the east and the west.”

THE CITY OF SUNNY ISLES BEACH IS...

“Exclusive, luxurious, diverse, family-oriented, modern, old town.”

INSIGHTS FROM THE FOCUS GROUP



A CITY OF CONTRASTS

EAST

The East is comprised of high-rise buildings - elegant, expensive and affluent, affronting the beach.

The East has a more transient population; owners/renters who make the City of Sunny Isles Beach their home for part of the year but hang their permanent hat in other areas of the country or abroad.

These properties have increased the tax base for the City, enabling the expansion of parks and recreational activities as well as other programs for those who live in the City of Sunny Isles Beach year-round.

WEST

The West are mostly year-round residents and made up 100% of the attendees to the Residents Focus Group.

Most have been living in the area for a long time. They recognize the changes in the community over the past two decades.

While the majority acknowledge the benefits the increased taxes and property values have reaped on the community, some also fear the long-term implications of being priced out of their community.

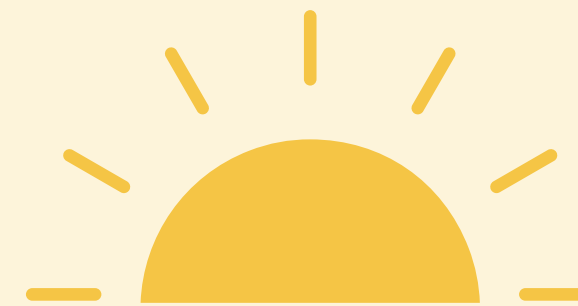
Most West side residents recall the “old Sunny Isles Beach” with its beach lined with small motels, easy beach access - “old style Florida”.

UNIFICATION

Despite marked differences in demographics between the east and west sides of the city, a common element that came up in the residents’ group was the concept of the City of Sunny Isles Beach having a good “**flow**” between both sides.

They expressed the inherent beauty to be found in both sides:

“There is unity. Nobody loses out in the City of Sunny Isles Beach.”
— Resident from focus group



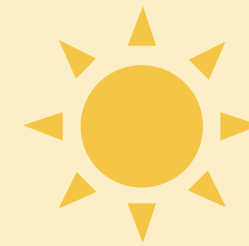
**“SUNRISE IN THE MORNING”
EAST**



**“SUNSET IN THE EVENING”
WEST**

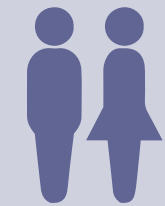


The strengths and characteristics universally attributed to the City of Sunny Isles Beach can be placed into four pillars – Landscape, People, Quality of Life and Location.



Landscape

Access to the beach and inter-coastal as well as parks and recreation, the pier, sunrises and sunsets



People

Family oriented community, friendly and welcoming, diverse and multi-cultural, international flavor



Quality of Life

Safe, clean, freedom for children to explore and play, A-rated school, accessibility to government staff and elected officials, City sponsored year-round events for all age groups, exclusive, upscale.



Location

Conveniently located near major highways with easy access to both Miami-Dade and Broward County airport and entertainment venues.

Character Association: Agree

Residents and Businesses agree the City of Sunny Isles Beach is...

★ Feminine

“the ocean is a she”, “beautiful = women”

★ Colorful

“sunrises and sunsets”, “shimmering buildings”, “diversity”, “beach and sun”

★ Luxury

“expensive”, “quality of life”

★ Fun

“beaches”, “daytime activities”, “happy people”, “events”, “celebrations”, “concerts”

★ Casual

“flip flops and bathing suits”, “beach town”, “casual dress code”

Character Association: Disagree

Yet they disagree on other characteristics...

Most Residents see the City as *Simple* (“what you see is what you get”, “activities all around”, “everything is right here”) while Businesses described it as *Intricate* (“many components”, “lots of parks”, “low rises and high rises”, “disparities in population and income distribution”)

Businesses and half of the Residents describe the City as *Modern* (“modern architecture on east”, “new buildings and construction”) while the other half of the Residents felt the city was *Classic* (“recognizable elements that have been around for decades”)

Most Residents see the City as *Sporty* (“the west side”) while Businesses and a few Residents see it as *Elegant* (“the east side”, “elegant expensive cars”, “the east side is elegant; a City divided”, “elegant compared to the rest of Miami”)

Expectations and Concerns for the Future of The City of Sunny Isles Beach



Expectations

Employees, Businesses and Residents all expect the city will continue to be culturally diverse and will become more artistic over time.



Concerns

Concerns for the future among all three segments, particularly the Residents, is over-development, more crowding and less affordability for all but the wealthy.

Barriers for New Businesses and Residents

1

Businesses reported extremely high rents were the primary barrier to attracting new businesses to the area.

2

Residents reported the high cost of living, high real estate costs and taxes, poor transportation and traffic were major barriers to attracting new residents.





Employees' Views

Employees views of what the City has to offer focused strongly on how they and the City serve its constituents and the pleasant environment the City has to offer.

“Provide the best/great customer service.”

“World class (developing) city.”

“We care”

“Residents are always first.”

“Come live here; welcome home.”

“A city to live, grow and relax in luxury.”

“Keeping the city safe and secure while ‘bridging the gap’ throughout the city’s establishments and values.”

“We will make the city so you want to live here.”

Business Group Sales Pitch

Business participants' "pitch" for the City focused on the four areas of strength previously identified – **Landscape, People, Quality and Location.**

"You always want to wake up here in the perfect location between Miami and Fort Lauderdale. A family destination where our kids feel well cared for and can explore ocean life and fun parks. A place where you feel safe, at ease and never want to leave."

"Clean, centrally located, safe, modern, artistic, diverse and welcoming."

"It's beautiful here, with a waterway unlike any other. You could be on the bay and looking at the sea at the same time. Violet skies; most beautiful sunsets from the bay."

"International, emerging, surrounded by water, family and leisure, colorful, bright, safe, convenient and accessible."

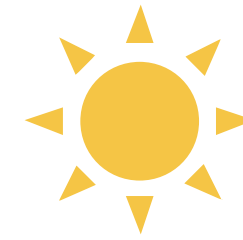
"The most beautiful city in Florida. Great schools. Friendly people. Lots of parks. Very safe place to live."

"Safety, cleanliness, beautiful wide beach."

"Beach and fishing pier. Central location to Lauderdale, South Beach, Midtown, Design District, Oleta Park. Eco friendly. Haulover for flying kites and marina. Proximity to world class shopping."

"Metropolis of beauty and international flavor. Golden beaches with family life of luxury, exclusivity and daily happiness. When you go to Sunny Isles, whether visiting or living, you know you have arrived!"

"Beaches, views, beautiful buildings, great diversity, family, fun, water sports, activities for all age groups. Art and color. A great place to come and escape."



"Wonderful beach. Beautiful residential areas. Business opportunities on the west side."

"Its location is central to Aventura, Broward, Hollywood, Fort Lauderdale, Bal Harbour, South Beach, Downtown Miami, the beaches, close to Collins Avenue. Great amenities including ten parks, shops, stores, banks, restaurants, the fishing pier, the ocean – all within walking distance. Safe and great bridges for pedestrians."

"Diversity come to life."

"A safe accessible community with parks, programs and events for every age group. A city where you can walk to the beach, to grab lunch or a cup of Cuban coffee. There's a K-8 school and a superior police department. Local government is very accessible."

"An island with great beauty full of multicultural residents, each of them adding to the family values. Next to the beach for fun, great schools for education. Near many of South Florida's attractions."

"Clean beautiful beach, accessible for all, walking distance to supermarkets and parks, family friendly, multi-cultural, programs for all ages, city events on a regular basis, free shuttle, close to all major highways and Aventura Mall, an A-rated K-8 school."

"Family-friendly, safe, walkable, close to the beach, many parks, A-rated school, close proximity to major airports."

Weaknesses



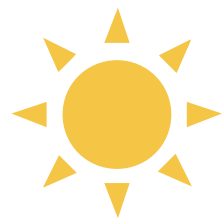
Traffic/congestion/over crowding were recognized as the main weakness of the City. The Business group, those affiliated with high-rise construction along Collins excused the inconvenience as “temporary”. Residents and employees are concerned about over development.



The lack of evening entertainment (fine dining restaurants, movie theaters, etc.) was a complaint across all groups.



Parking, particularly beach parking, was a major complaint voiced loudly in all sessions.



The lack of afternoon sunshine on the beach due to the high-rise construction was a major complaint – one participant called it “Shady Isles Beach” to emphasize the lack of sunshine available to beachgoers.



Residents expressed an interest in more pedestrian walkways. Businesses and Residents expressed an interest in a pedestrian mall like Lincoln Road Mall in South Beach.



There was a strong and pervasive feeling that RK controlled too much of the commercial real estate along Collins Avenue. Businesses, particularly those affiliated with luxury development, complained the city failed to pass ordinances that would require RK strip malls to “beautify” their properties by planting trees and landscaping



Some were happy that the city was known as “Little Russia/Moscow”. While they understood the city has a large Russian population versus other areas of the country, they also felt the identification failed to focus on the true diversity of the area.

Communication

Employees and Businesses felt the City needed to improve its communication with the community.

Employees

Employees reported low attendance at some community events. The poor show rates were attributed to lack of awareness/information in the hands of the citizens.

Businesses

Businesses expressed dissatisfaction with the depth and frequency of communication with the City. Text messages, emails and Newsletters were the most effective forms of communication.

Residents

Generally, residents reported the City effectively communicated with them via email, text message and the Newsletter. Satisfaction with the level and degree of communication among this segment should be viewed with caution. The Residents interviewed were highly engaged in the community and may not be representative of most City of Sunny Isles Beach residents.





MUNICIPAL QUESTIONNAIRES

Elected Officials and Public Arts Advisory Committee

Four Elected Officials and five members of the Public Arts Advisory Committee (PAAC) were asked to fill out questionnaires with the goal of obtaining insight into their opinions on some of the topics discussed in the three focus group sessions.

Elected officials were asked to complete a longer questionnaire than the PAAC members.

Overall, the Elected Officials and PAAC findings were in line with the findings of City Employees, Businesses and Residents.

As with the focus groups, those closest to City Hall also see the City of Sunny Isles Beach as having four pillars that positively define the City - Landscape (beach and parks), People (diverse, family oriented, friendly), Quality of Life (A rated schools, low crime/safe, City sponsored events) and Location (conveniently located between Miami and Fort Lauderdale).

Among Elected Officials, opinions regarding the strengths, weakness, values and mission of the City of Sunny Isles Beach as well as words used to describe the City were very similar to those reported in the three sessions.

Elected officials seemed slightly more likely to point out the strengths of City government versus Residents and Businesses - “government is efficient and responsive”, “a caring government that’s accessible and meets the needs of its residents”, “honest government balancing the interests of all residents”.

While there were similarities in the Characteristic Associations, there were some differences versus the opinions of the Resident and Business groups.

EMPLOYEES	RESIDENTS	BUSINESSES
Casual	Casual	Casual
Fun	Fun	Fun
Luxury	Luxury	Luxury
Approachable	Approachable	Approachable
Elegant	Sporty	Elegant
Masculine	Feminine	Feminine
Modern	Evenly Divided Modern vs. Classic	Modern
Evenly divided Simple vs. Intricate	Simple	Intricate
Evenly divided B&W/ Gray vs. Colorful	Colorful	Colorful

ELECTED OFFICIALS

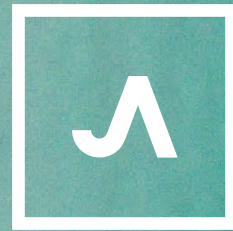
Logo Communication “Wish List”

ELECTED OFFICIALS DESIRE A LOGO THAT COMMUNICATES THAT THE CITY OF SUNNY ISLES BEACH IS...

- “A family-friendly community”
- “A diverse modern cosmopolitan beachfront City”
- “Where residents and visitors can enjoy City organized activities and entertainment”
- “With a premier location between Miami and Fort Lauderdale”
- “That is bright, beautiful, serene and inclusive”

THEY ALSO REPORTED THE MISSION OF THE CITY WAS TO...

- “Make the lives of residents better”
- “Provide an honest government balancing the interests of all residents
- “To be a lawful, high-functioning City”
- “Continue to be a multicultural community”
- “A cohesive and engrossing place to live, work and play”



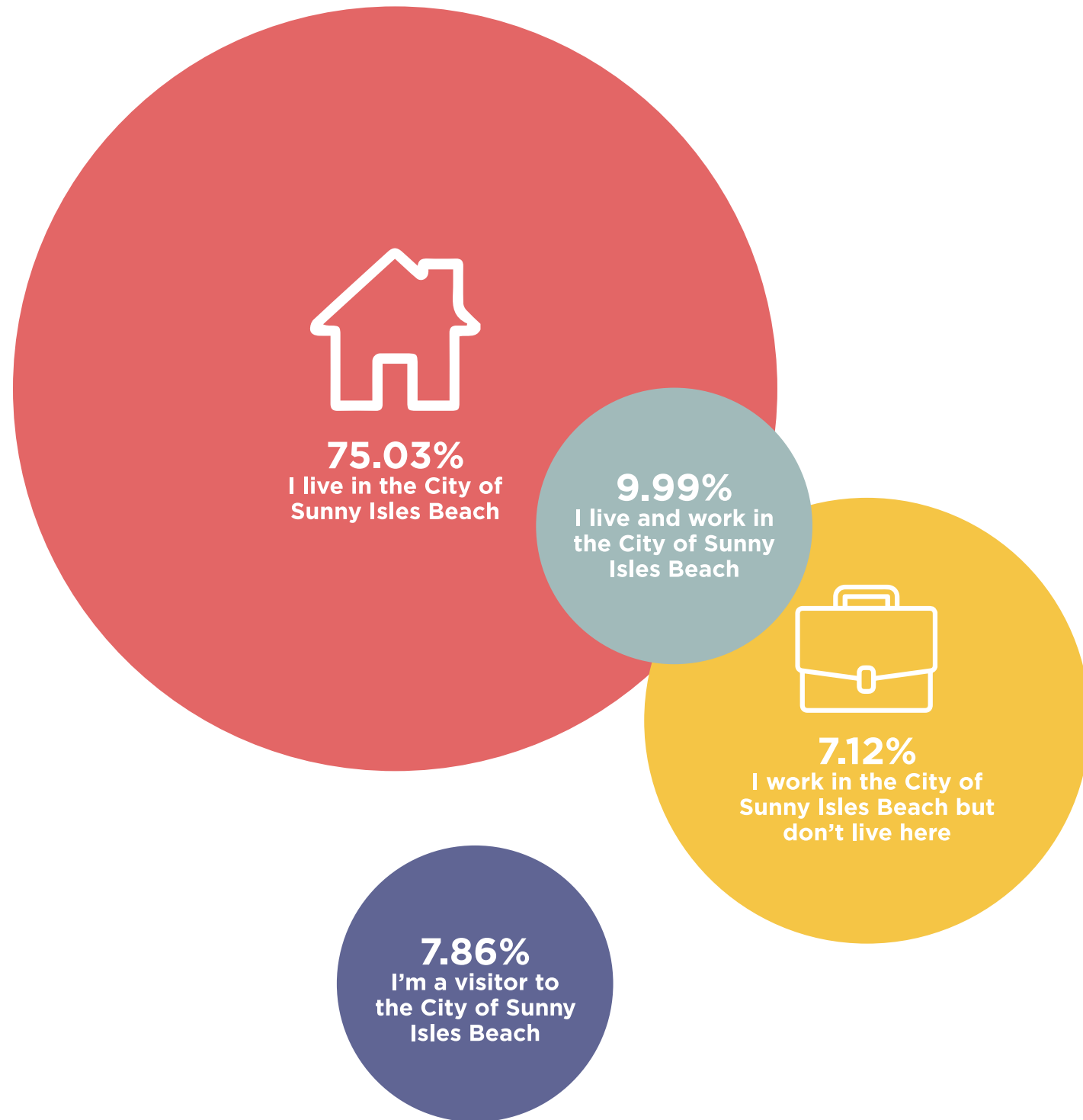
QUANTITATIVE RESEARCH:

Phone and Online Surveys

Of the 941 survey participants, 85% chose to answer the survey in English, 12% preferred Spanish, and 3% responded in Russian.



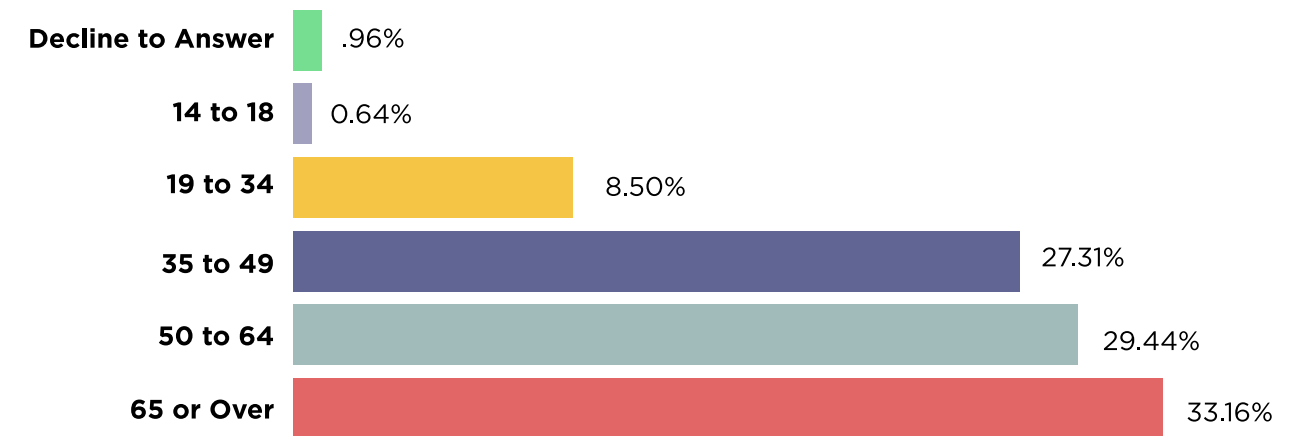
1. Relationship to the City



2. Age

37% were between the ages of 14 and 34, 27% between the ages of 35 and 49, 29% between the ages of 50 and 64, and 33% of the participants were 65 years of age and over

When broken out by residents of the east or west side of Collins Avenue, it was found that those living east of Collins Avenue averaged 57.2 years old, while those living west of Collins were slightly younger, averaging 55.5 years old. Furthermore, of the top three languages in the City of Sunny Isles Beach, those that primarily spoke Russian at home skewed younger, at an average age of 52 years old.



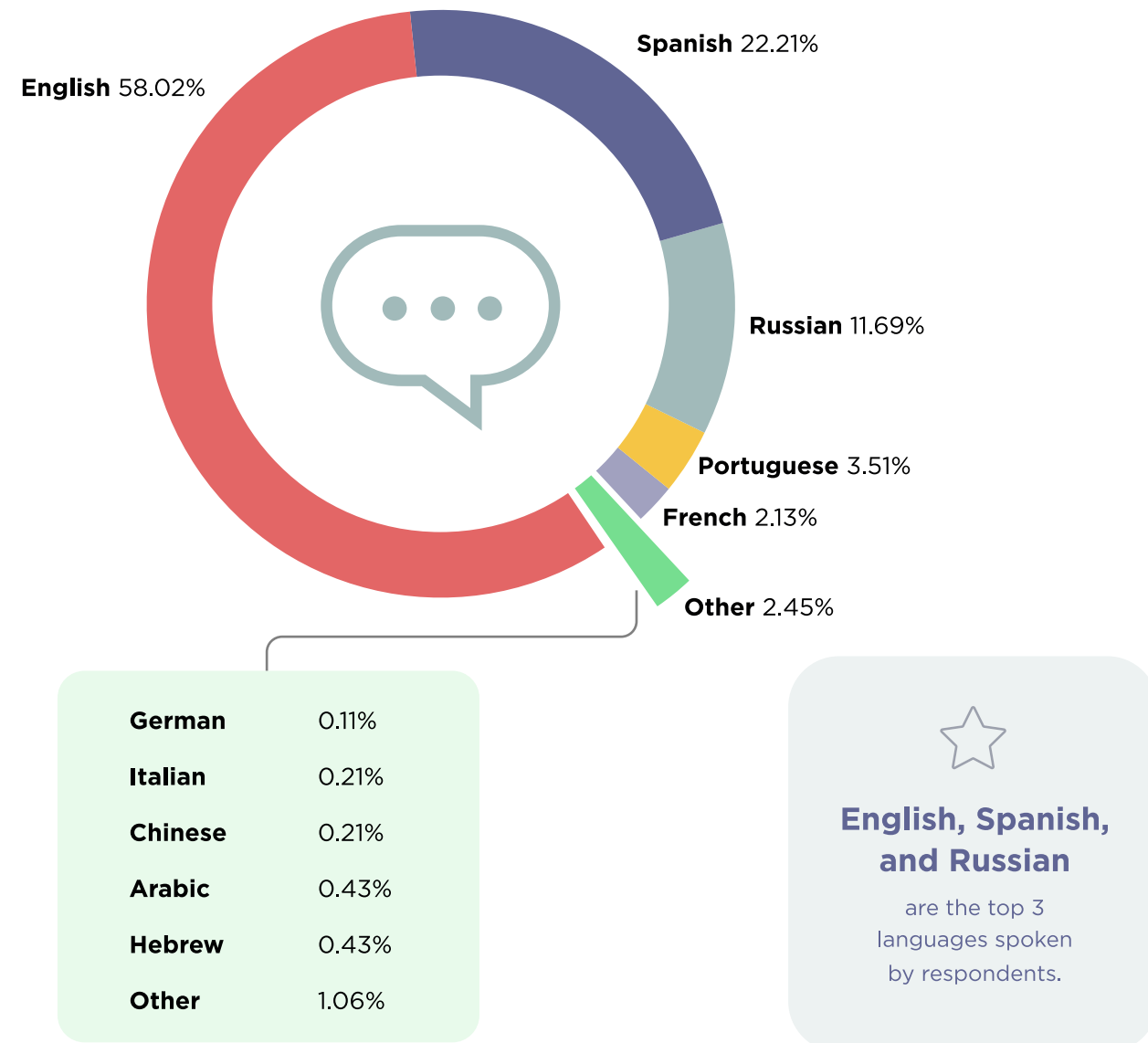


3. Primary Language

Residents of the City speak a variety of languages within the home environment dominated by English, Spanish, and Russian. More than half of the residents (58%) speak mostly English in the home. More than one fifth (22.1%) responded that they mostly spoke Spanish at home, and almost twelve percent (11.69%) mostly spoke Russian in the home.

All other languages (Portuguese, French, German, Italian, Chinese, Arabic, Hebrew and others) combined were spoken mostly at home by approximately 7% of the residents. For the purposes of this report, we'll be concentrating our focus on segmenting the top three languages.

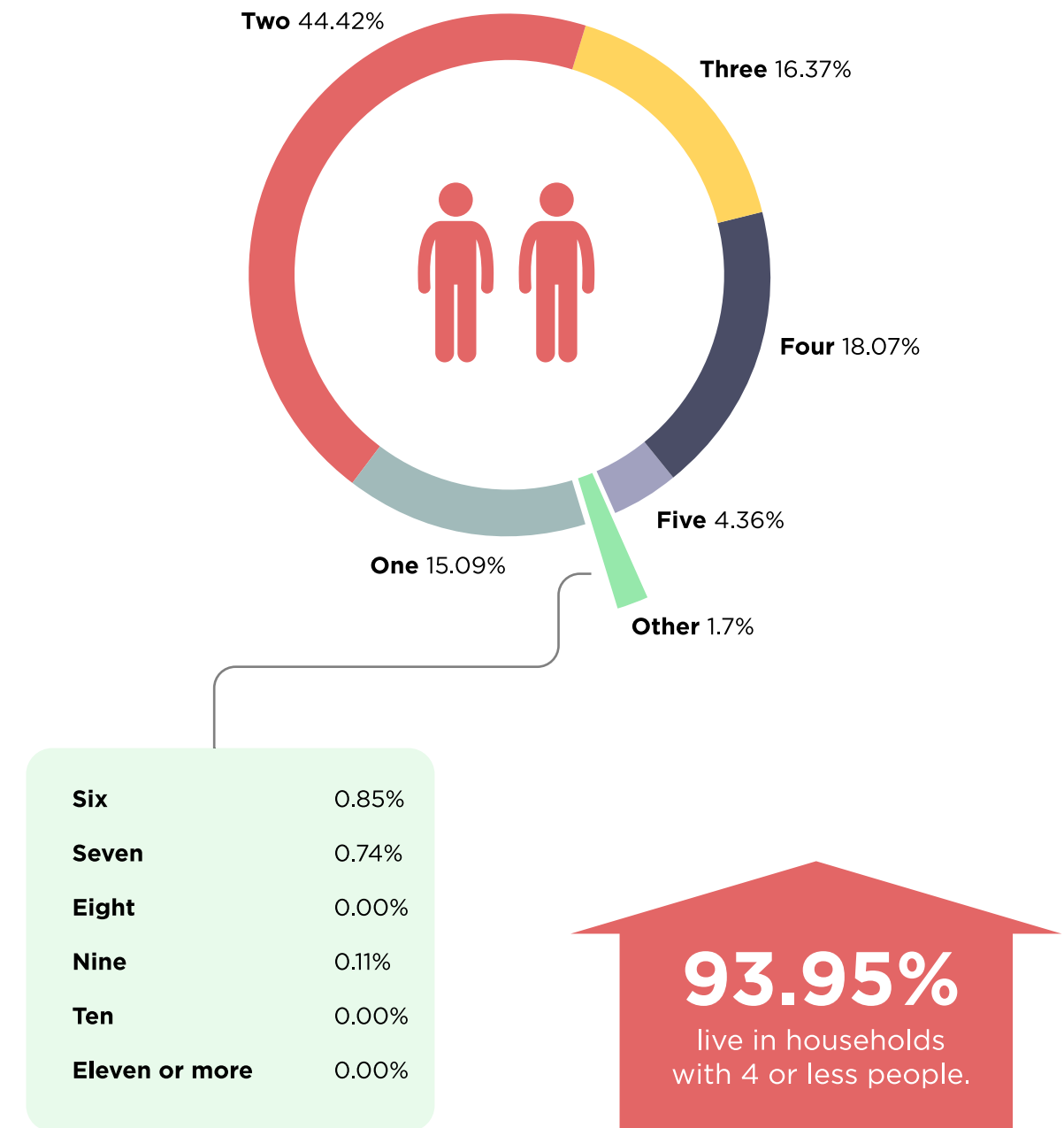
Interestingly, when compared to duration of residence, 68% of residents who have lived in the City for more than 10 years speak English primarily at home compared to less than half (48%) of residents living in the City for less than 10 years. Residents living in the City less than 10 years are three times more likely to speak Russian (20% vs. 6%) than residents who have lived in the City for more than 10 years.



4. Household Size

The most prevalent household size in the City of Sunny Isles Beach is households of two at 44% of the survey population.

Part-time residents were more likely to consist of smaller households than full-time residents, with only 29% of part-time residents reporting three or more people living together, compared to 43% of full-time residents.



Persons/Household	East of Collins	West of Collins
One	16%	17%
Two	47%	42%
Three	12%	19%
Four	20%	18%
Five	4%	4%
Six	1%	0%
Seven	0%	1%
Nine	0%	0%
Grand Total	100%	100%
Avg. Persons/HH	2.53	2.53

There are more two-person homes East of Collins (47%) than West (42%) and more 3 and 4 person homes West of Collins (37%) than East (32%).



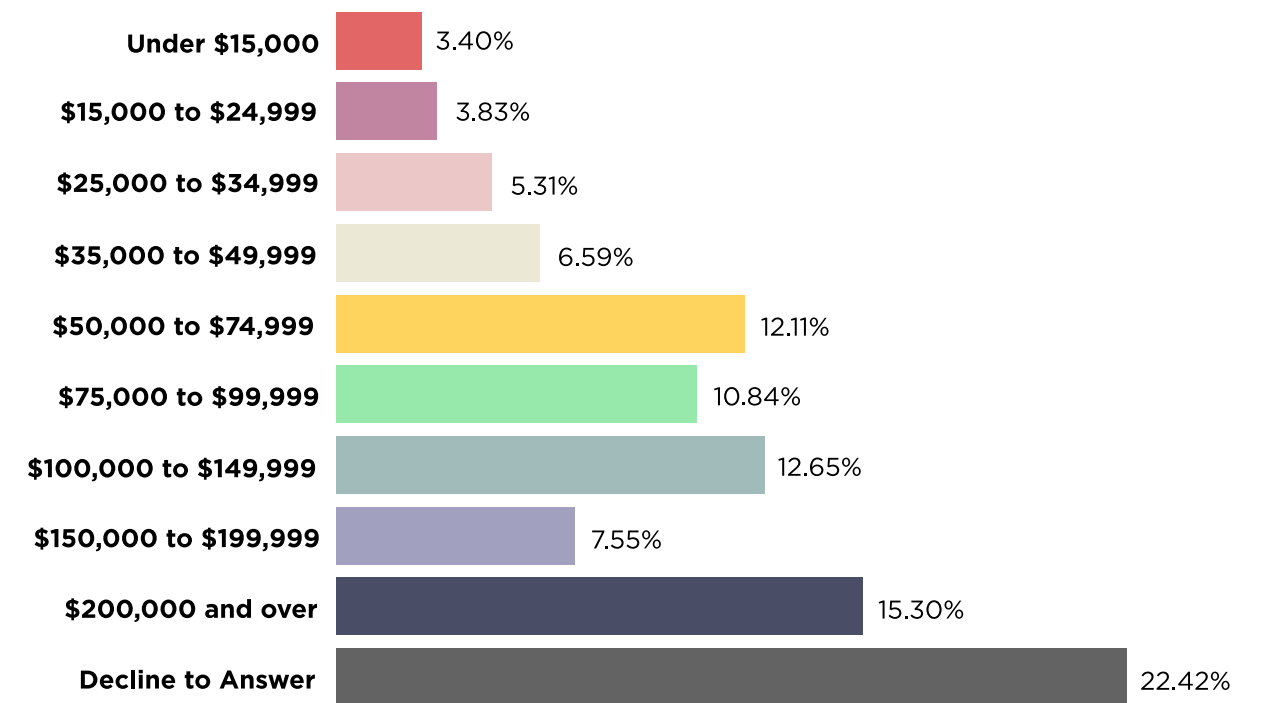
Residents living in the City less than ten years tend to have larger families than residents who have lived in the City for more than 10 years.

5. Household Income

As a general rule of thumb, self-reported household income on surveys should be taken with a grain of salt. In this instance, 22% of respondents opted not to answer the household income question, so the data should be taken as more indicative than fully representative.

Taking that into account, the largest income bracket in this survey were household incomes of \$200k and above, with 15.3% of responses, followed by \$100k - \$149k with 12.65% of responses.

When segmented further, income distribution greatly varies between full-time residents and part-time residents and east and west sides of Collins Avenue. This income inequality becomes more evident when taking a closer look at the data.



\$15,000 | \$200k+

While most declined to answer, majority of respondents make over \$50,000

Avg. HH Income	E of Collins	W of Collins	Non-Residents	Grand Total	As a % of Total
< \$15,000	5%	3%	1%	3%	3%
\$15,000 - \$24,999	5%	4%	3%	4%	4%
\$25,000 - \$34,999	5%	6%	4%	5%	5%
\$35,000 - \$49,999	5%	8%	4%	7%	7%
\$50,000 - \$74,999	7%	14%	14%	12%	12%
\$75,000 - \$99,999	7%	12%	14%	11%	11%
\$100,000 - \$149,999	10%	12%	18%	13%	13%
\$150,000 - \$199,999	7%	8%	7%	8%	8%
\$200,000	24%	10%	18%	15%	15%
NA	25%	23%	16%	22%	22%
Grand Total	100%	100%	100%	100%	100%
Avg. HH Inc. ex NA	\$132,683	\$104,954	\$126,277	\$115,875	\$ -

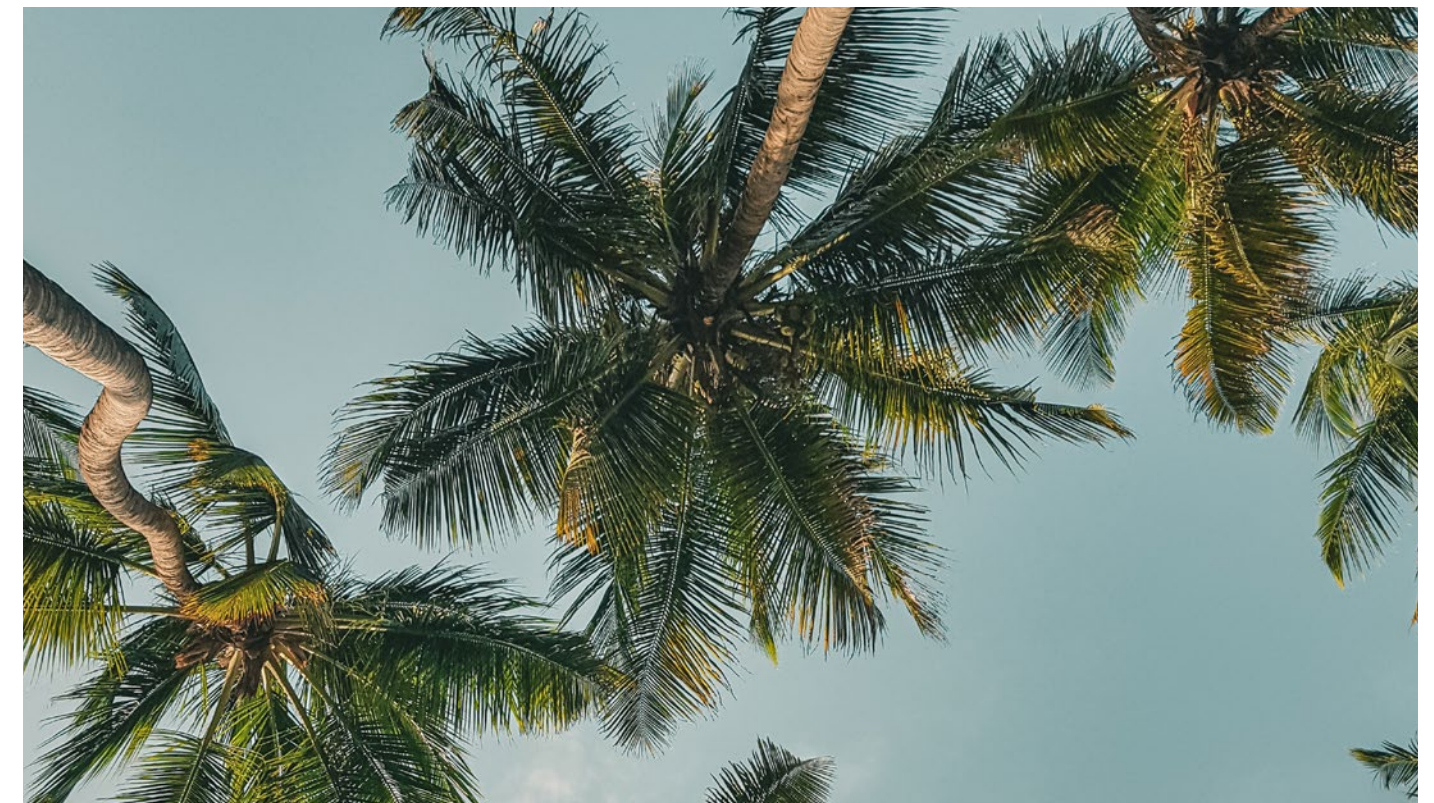
Full-time residents are almost three times more likely (30.1% vs. 11.6%) to earn less than \$50,000 than part-time residents, while conversely, part-time residents are almost twice as likely (68.1% vs. 39%) to earn more than \$100,000, and close to three times more likely (40.2% compared to 14.6%) to earn more than \$200,000.

West side of Collins Avenue residents are more likely (60% vs. 46%) to make less than \$100,000. In contrast, east of Collins Avenue residents are more likely (54% vs. 40%) to make more than \$100,000 and almost three times more likely (31.6% vs. 13.6%) to make in excess of \$200,000.

	Total
Residents East of Collins	\$99,639.61
Residents West of Collins	\$80,808.59
Non-Residents	\$106,574.14
Combined	\$89,892.37

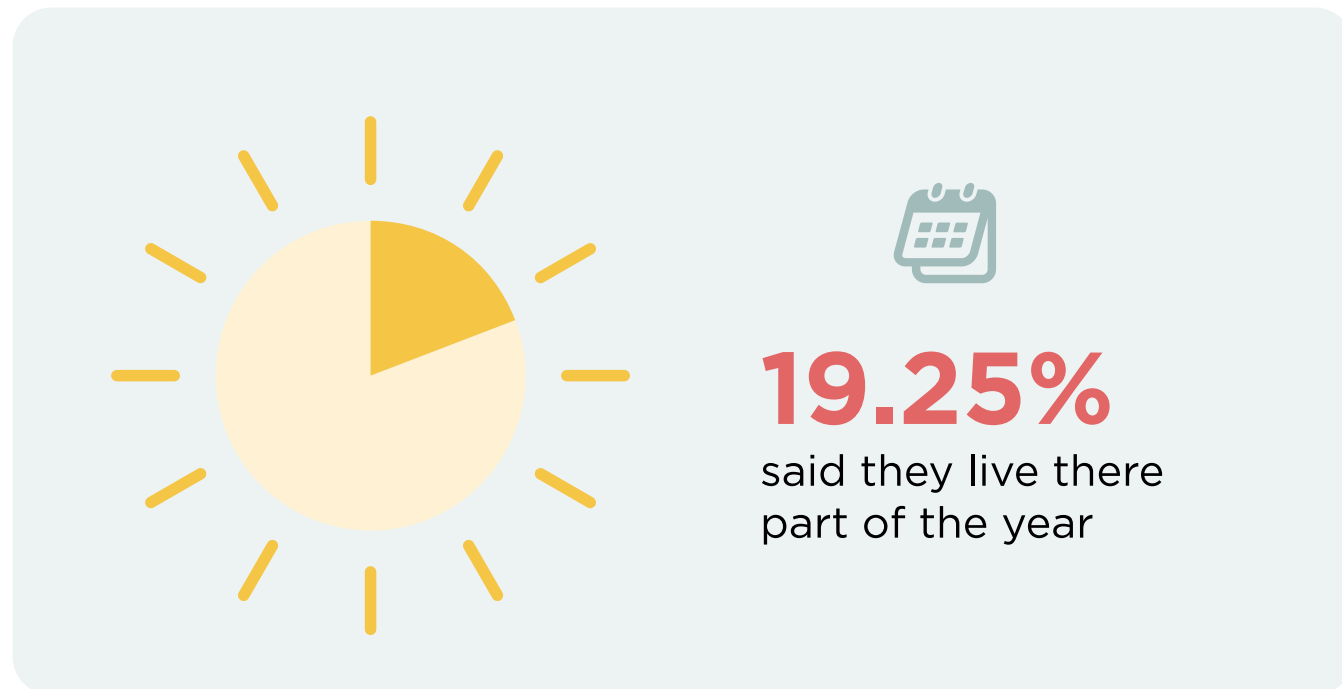
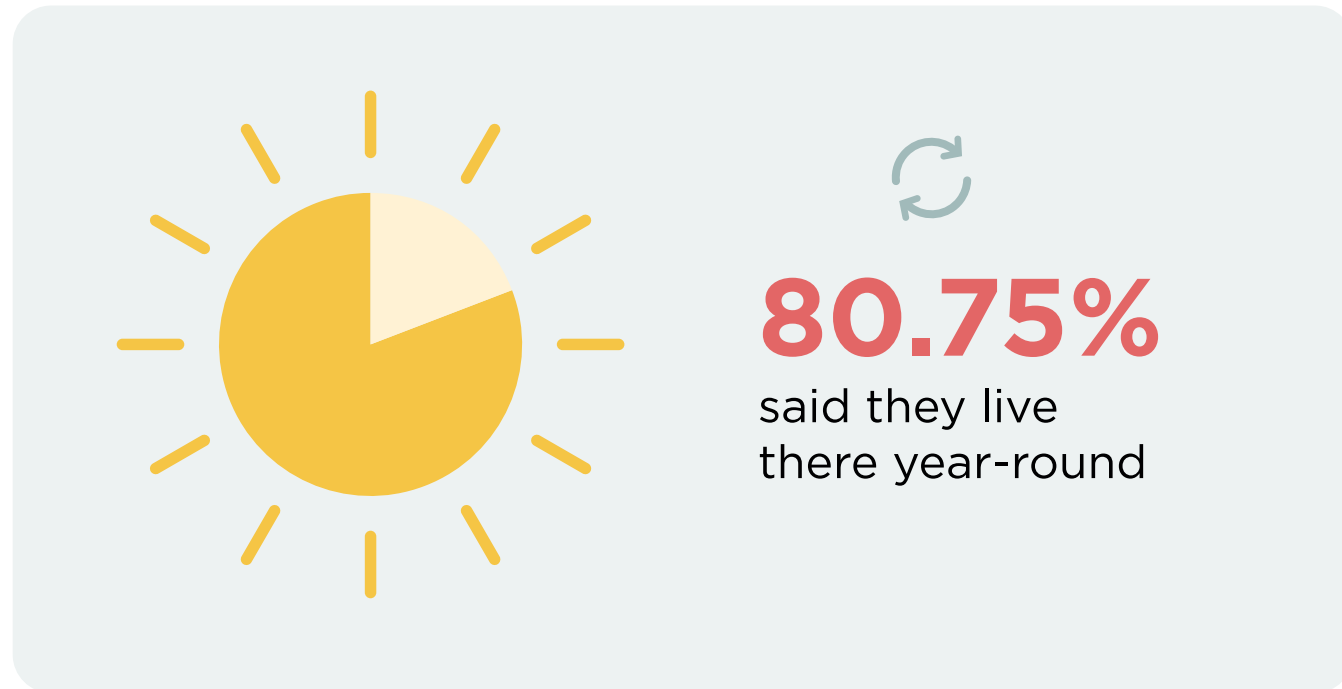
Of the respondents that opted to give their income data, the overall average HHI was \$89,892, with East of Collins Ave households making approximately \$99,640, and West of Collins Ave households making around \$80,809 per year.

Income levels were consistent among longer and shorter tenure residents.



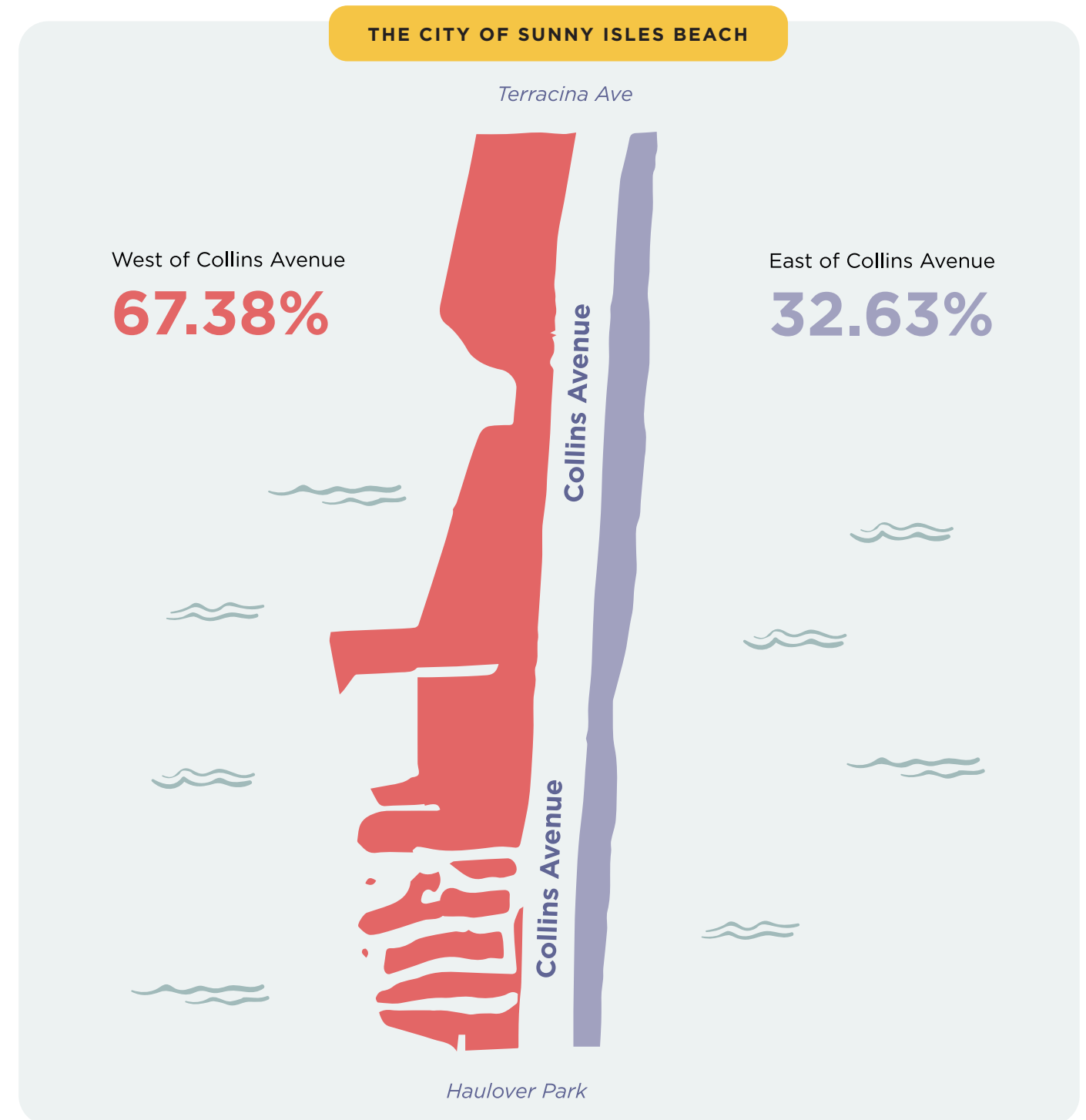
6. Resident Profile: Full-Time or Part-Time

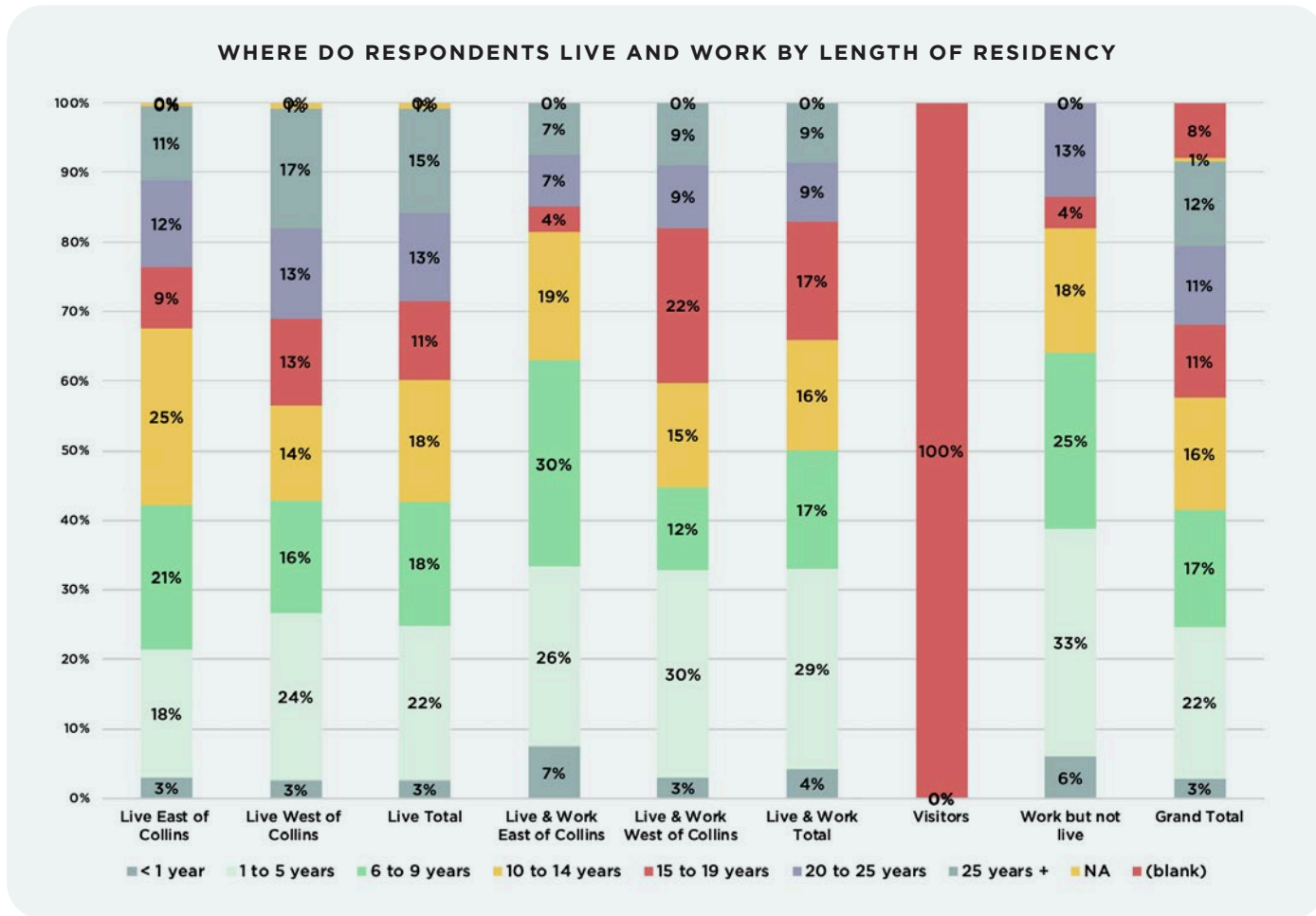
Respondents who were residents were asked an additional three questions to further build out the resident profile. Of those residents, 81% indicated that they were year-round residents of the City. By contrast, 19% of resident respondents indicated that they lived in the City for only part of the year.



7. Resident Profile: Location

Early in the discovery process with internal stakeholders, there were numerous mentions and concerns about the perceived divide between residents on the west and east sides of Collins Avenue. These concerns resurfaced during the focus group phase of the research, thus meriting further exploration within the quantitative phase of research.





Overall, 67% of resident respondents indicated living west of Collins Avenue, while 33% lived east of Collins Avenue.

When segmented by time living in the City, many of people who live east of Collins are relative newcomers: 42% have been here less than 9 years and 23% have been here for over 20 years. While people who live west of Collins have a higher percentage of being newcomers (43% less than 9 years) the number of respondents living here for over 20 years is significantly higher (30%).

If those who have lived in the City 15 years or more are added together, 32% of those living east of Collins have done so for over 15 years while 43% of those living west of Collins have been here the same time.

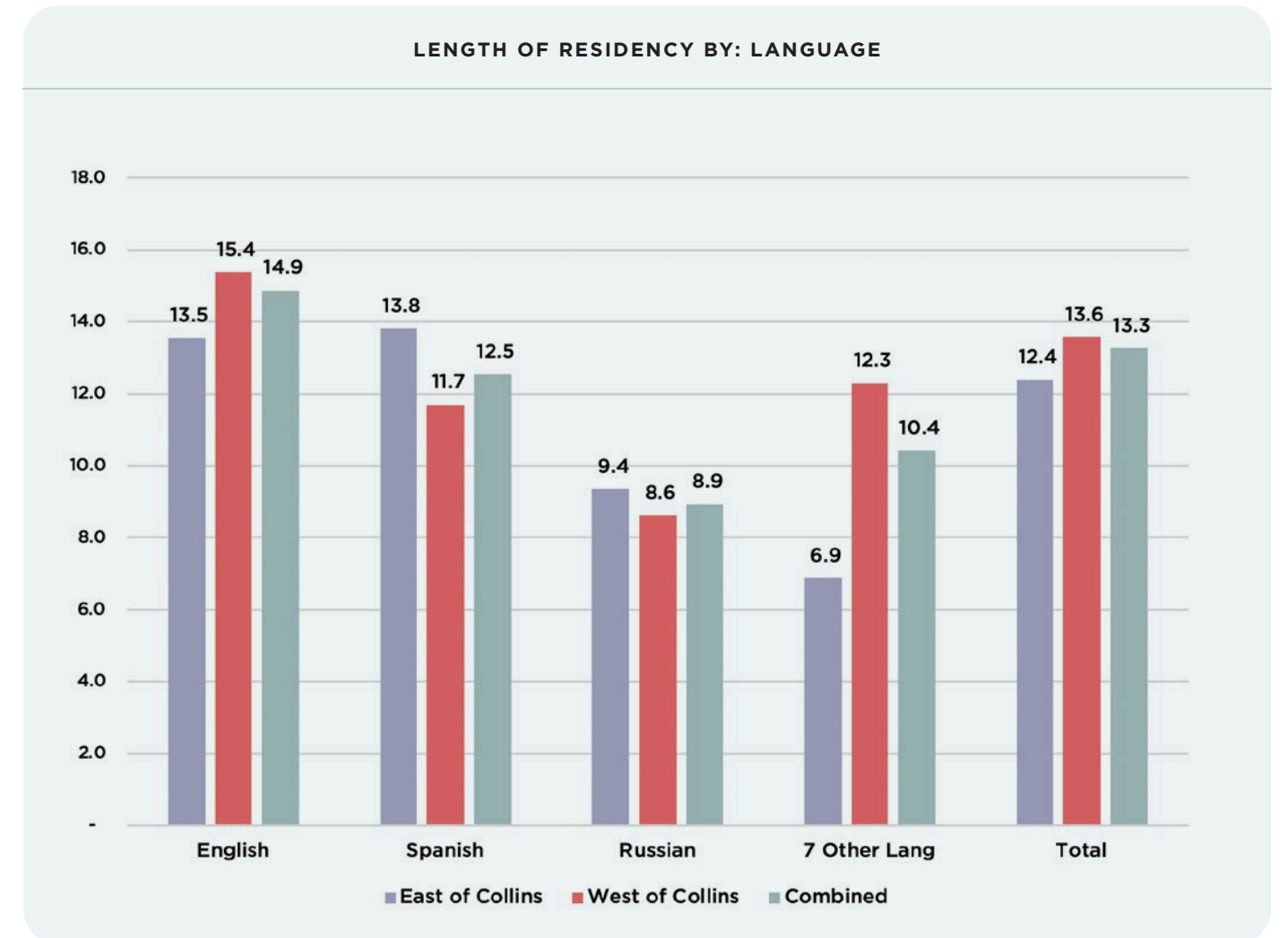
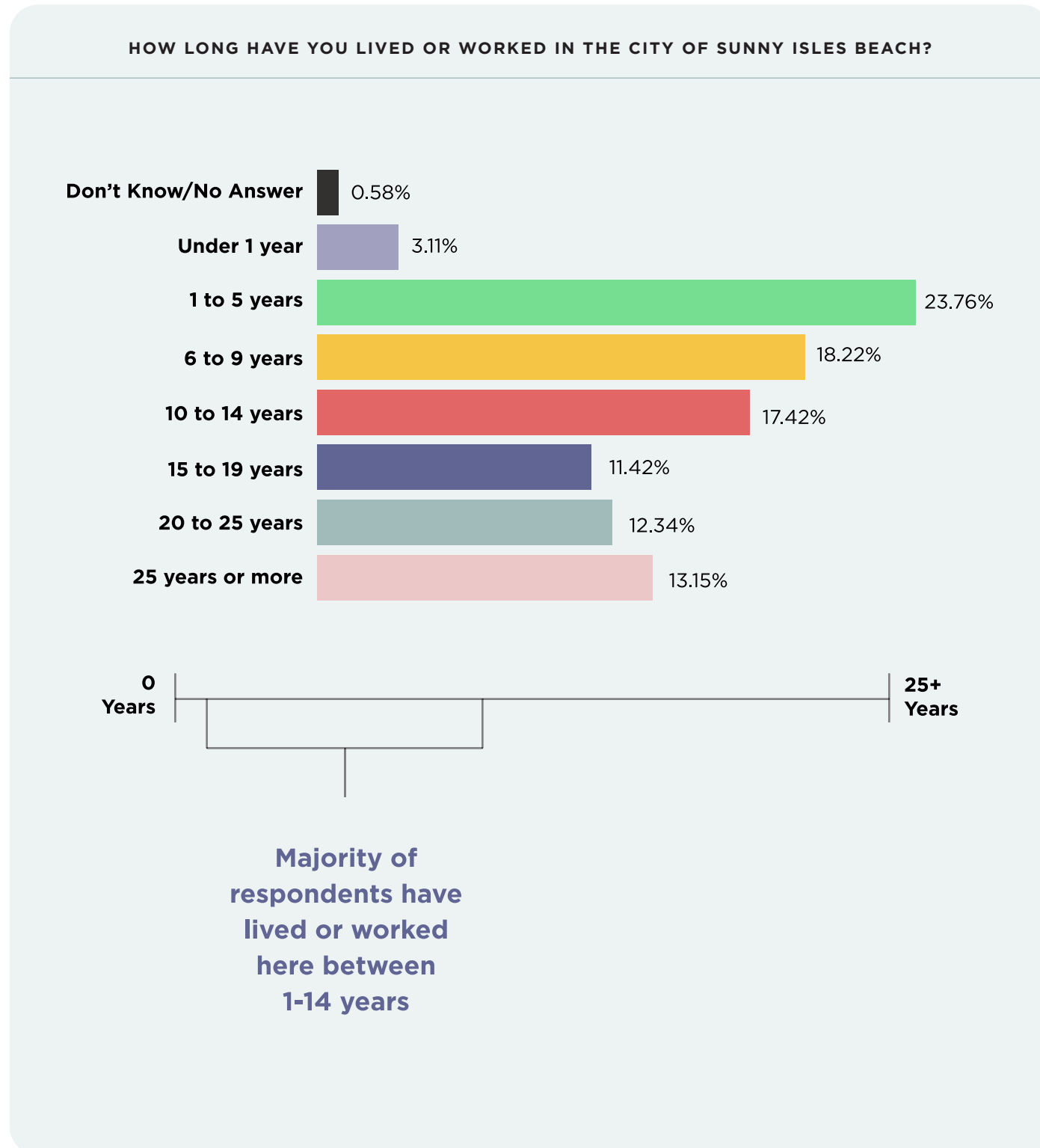
For those who both live and work in the City of Sunny Isles Beach, the situation is a bit more extreme: 63% of those who live east of Collins and work in the City have been there less than 9 years.

Only 45% of those who live west of Collins and work in the City have been there less than 9 years, but that's because the number who have been there 15-19 years is much larger (22% vs. 4%)



8. Resident Profile: Duration

Of the respondents that indicated that they either lived or worked in the City, 24% reported only being there for one to five years, while over 25% indicated being there for over 20 years.

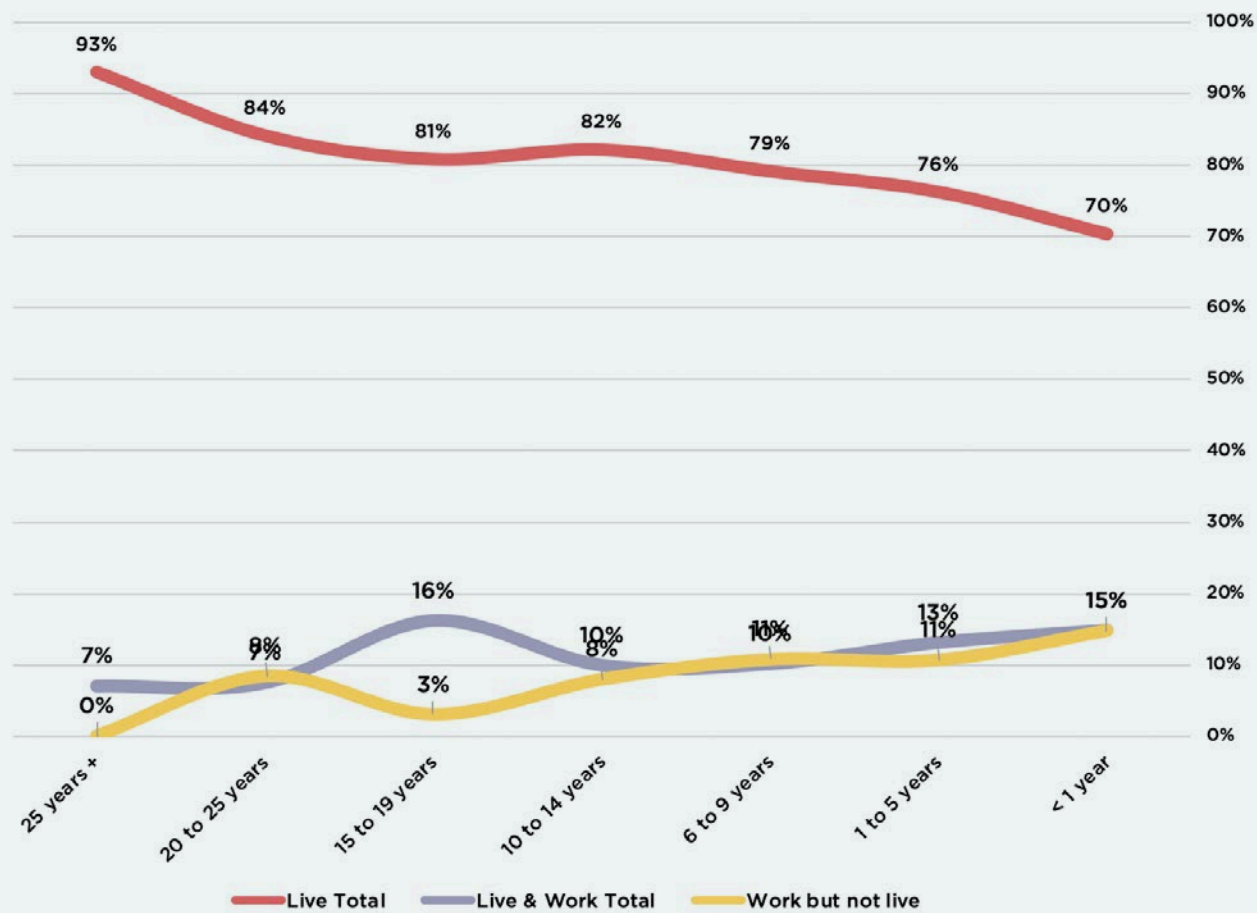


In general, people who live West of Collins have lived longer in the area than people who live East of Collins. This is driven by households where English is the primary language, where the average length of residency for those living East of Collins is 13.5 years vs. 15.4 years for those living West of Collins. For Spanish-speakers, the relationship is exactly the opposite, with those living East of Collins having a difference of 2 years vs. those living West of Collins. The differences are small, however, except in the case of everyone who doesn't speak English, Spanish or Russian, but they represent scarcely 7% of respondents.



Interestingly, there has been an influx of people in the last one to five years (33%) of people who live and work in the City of Sunny Isles Beach.

LENGTH OF RESIDENCY BY: LIVE AND WORK



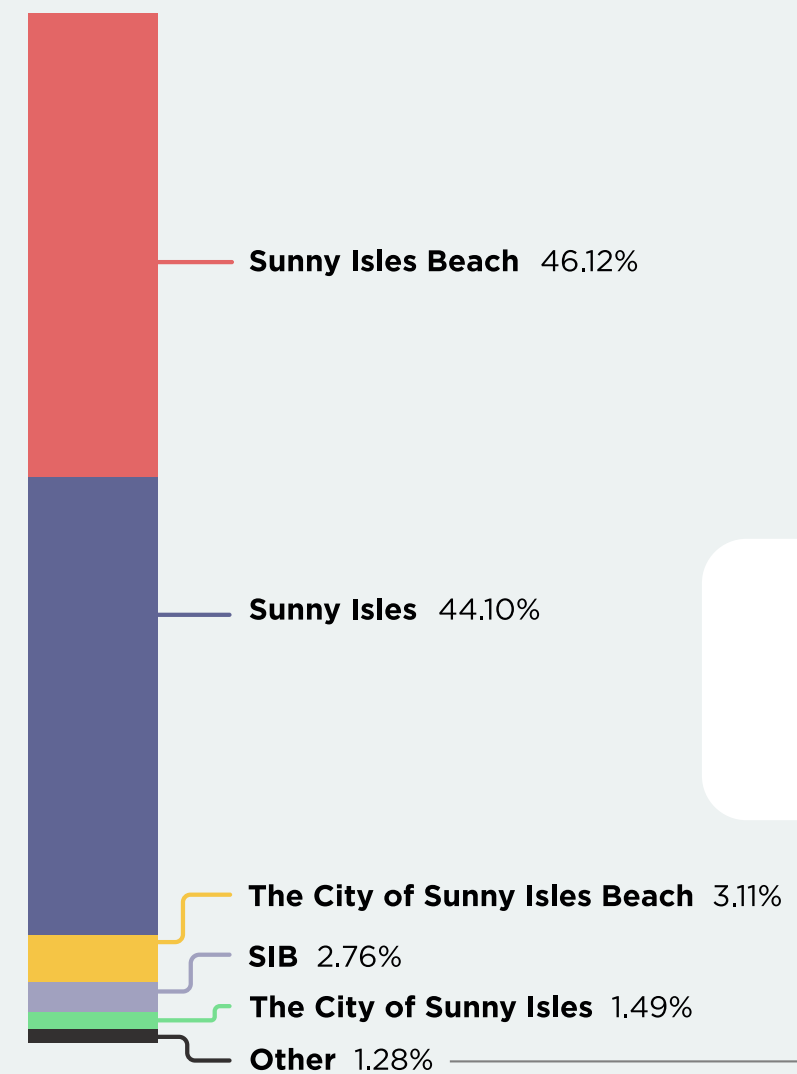
9. City Name

Overall, about nine out of ten (90%) of the respondents refer to the City as either “Sunny Isles Beach” (46%) or “Sunny Isles” (44%). Only 4% refer to the City as “The City of Sunny Isles Beach” and only 2% refer to the City as “SIB”.

People who work in the City are more likely to refer to the City as “The City of Sunny Isles Beach” (17% vs. 4%). They were also less likely to refer to City as “Sunny Isles Beach” (40%) when compared to the overall study sample (46%).

Visitors most frequently refer to the City as “Sunny Isles” 62% of the time.

Residents living in the City over ten years are more likely to refer to the City as Sunny Isles Beach (52% vs. 42%) while residents living in the City less than 10 years tend to refer to the City as Sunny Isles Beach more often (48% vs. 38%) than longer tenure residents.

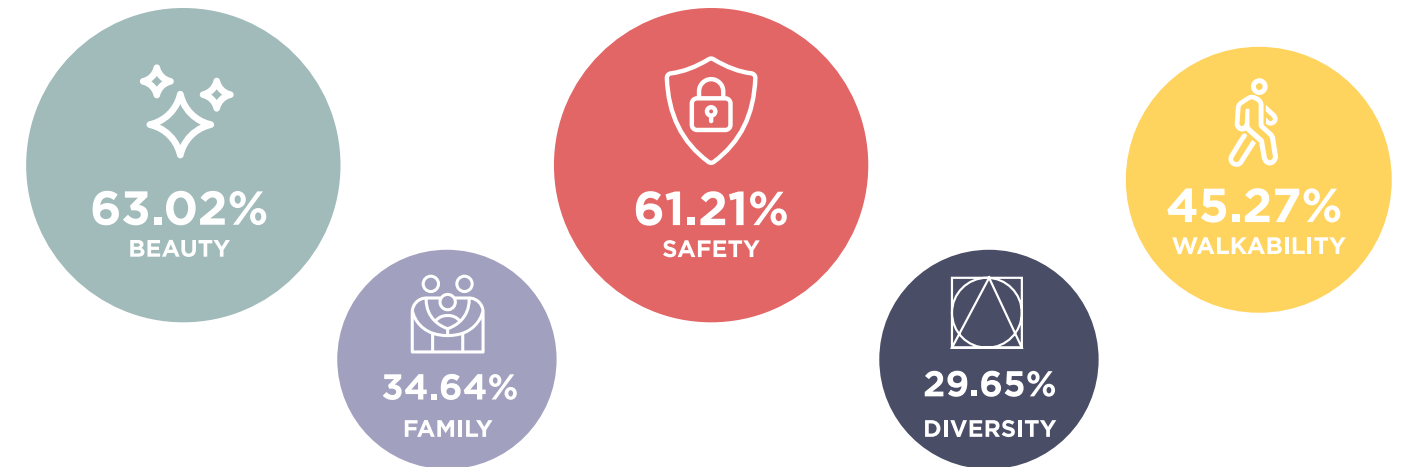


Other
Sunny
Little City



10. Positive Word Association

Almost two thirds of the survey participants used the words “Beauty” (63%) and “Safety” (61%) to describe the City. Other significant words mentioned were “Walkability” (nearly half, 45%), “Family,” “Diversity” (30%), “Community” (29%), “Accessibility” (27%), “Unique” (23%), and “Excellence” (20%).



Community	29.12%
Accessibility	26.99%
Unique	23.49%
Excellence	19.77%
Sophistication	18.38%
Simplicity	7.76%
Eco-Consciousness	6.80%
Innovation	6.59%
Accountability	4.78%
Creativity	4.68%
Authenticity	4.25%
Transparency	3.19%
Empathy	2.87%
Other	1.59%

Other

- Clean
- Tranquility
- Beach
- Friendly



POSITIVE WORD ASSOCIATION

Resident	Resident	Non-Resident	Grand Total
Q10 - Beauty	19%	16%	16%
Q10 - Safety	18%	15%	16%
Q10 - Walkability	7%	12%	12%
Q10 - Family	9%	9%	9%
Q10 - Diversity	2%	8%	8%
Q10 - Community	12%	7%	7%
Q10 - Accessibility	7%	7%	7%
Q10 - Unique	3%	6%	6%
Q10 - Excellence	5%	5%	5%
Q10 - Sophistication	3%	5%	5%
Q10 - Simplicity	3%	2%	2%
Q10 - Eco-Consciousness	1%	2%	2%
Q10 - Innovation	1%	2%	2%
Q10 - Accountability	3%	1%	1%
Q10 - Creativity	2%	1%	1%
Q10 - Authenticity	4%	1%	1%
Q10 - Transparency	1%	1%	1%
Q10 - Empathy	1%	1%	1%
	100%	100%	100%

POSITIVE WORD BY LANGUAGE

Positive Word	English	Spanish	Russian	7 Other Lang	Grand Total
Beauty	15%	18%	17%	16%	16%
Safety	14%	17%	18%	19%	16%
Walkability	13%	7%	13%	11%	12%
Family	7%	10%	10%	12%	9%
Diversity	9%	7%	4%	5%	8%
Community	8%	6%	7%	10%	7%
Accessibility	7%	6%	8%	5%	7%
Unique	7%	5%	6%	3%	6%
Excellence	5%	6%	5%	4%	5%
Sophistication	5%	4%	2%	5%	5%
Simplicity	2%	3%	1%	2%	2%
Eco-Consciousness	2%	2%	2%	1%	2%
Innovation	2%	1%	1%	1%	2%
Accountability	1%	2%	1%	1%	1%
Creativity	1%	1%	0%	1%	1%
Authenticity	1%	1%	1%	1%	1%
Transparency	1%	1%	1%	1%	1%
Empathy	0%	2%	1%	1%	1%

Interestingly, Non-English speakers mentioned the word “Family” slightly more than the overall sample when describing the City. Spanish speakers also find “family” much more compelling than “walkability” by about 50%.

POSITIVE WORD INCOME BRACKET											
Positive Word	< \$15,000	\$15,000 - \$24,999	\$25,000 - \$34,999	\$35,000 - \$49,999	\$50,000 - \$74,999	\$75,000 - \$99,999	\$100,000 - \$149,999	\$150,000 - \$199,999	\$200,000	NA	Grand Total
Beauty	3.0%	4.2%	5.4%	7.1%	12.1%	11.8%	13.3%	7.1%	15.2%	20.7%	100.0%
Safety	3.5%	4.0%	5.7%	7.8%	12.3%	11.5%	13.9%	7.3%	14.4%	19.6%	100.0%
Walkability	2.3%	2.8%	4.2%	4.9%	12.4%	13.1%	14.8%	7.7%	14.6%	23.0%	100.0%
Family	2.5%	4.3%	5.2%	7.4%	16.3%	12.3%	13.5%	7.1%	12.0%	19.6%	100.0%
Diversity	1.8%	2.5%	6.1%	7.2%	9.3%	11.5%	11.8%	10.8%	17.9%	21.1%	100.0%
Community	3.3%	4.0%	4.7%	5.5%	13.9%	12.0%	15.7%	7.7%	12.0%	21.2%	100.0%
Accessability	2.4%	2.8%	6.7%	5.1%	13.0%	9.8%	13.0%	7.1%	13.0%	27.2%	100.0%
Unique	1.4%	1.4%	4.5%	4.1%	10.9%	14.0%	13.1%	9.0%	19.5%	22.2%	100.0%
Excellence	5.4%	8.1%	4.3%	3.2%	12.4%	12.4%	10.8%	9.1%	16.1%	18.3%	100.0%
Sophistication	2.3%	1.7%	1.7%	2.9%	10.4%	9.2%	15.0%	11.0%	23.1%	22.5%	100.0%
Simplicity	2.7%	4.1%	8.2%	9.6%	13.7%	5.5%	9.6%	8.2%	16.4%	21.9%	100.0%
Eco-Consciousness	4.7%	6.3%	7.8%	10.9%	10.9%	9.4%	9.4%	6.3%	17.2%	17.2%	100.0%
Innovation	0.0%	4.8%	6.5%	12.9%	12.9%	11.3%	11.3%	6.5%	21.0%	12.9%	100.0%
Accountability	2.2%	11.1%	4.4%	11.1%	17.8%	4.4%	8.9%	0.0%	8.9%	31.1%	100.0%
Creativity	6.8%	6.8%	13.6%	4.5%	15.9%	11.4%	9.1%	0.0%	15.9%	15.9%	100.0%
Authenticity	0.0%	2.5%	10.0%	5.0%	20.0%	5.0%	10.0%	5.0%	22.5%	20.0%	100.0%
Transparency	6.7%	16.7%	10.0%	16.7%	13.3%	3.3%	10.0%	10.0%	3.3%	10.0%	100.0%
Empathy	11.1%	3.7%	7.4%	14.8%	14.8%	7.4%	11.1%	7.4%	7.4%	14.8%	100.0%

There is a clear divide by income after \$50k/year and a clear difference in the \$150 - \$200k bracket. The top words do well with just about everyone except that \$150-\$200k bracket.

- The bottom 4 words (*Creativity, Authenticity, Transparency and Empathy*) do well with lower earners and mediocre with higher earners.
- Authenticity and Creativity do well with top earners but mediocre to poor with middle earners.
- Since middle earners are the bulk, however, the top 3 words are still the safest representation words.
- Finally, part-time residents mentioned “Walkability” more frequently (56%) than the rest of the survey participants.

The top 3 words (*Beauty, Safety and Walkability*) do well with just about everyone from \$50k/year and up, so they are a safe representative choice.

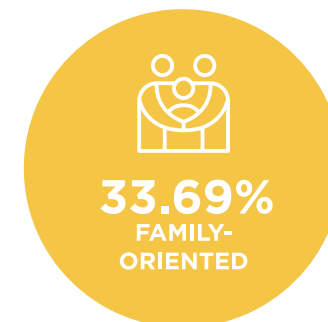
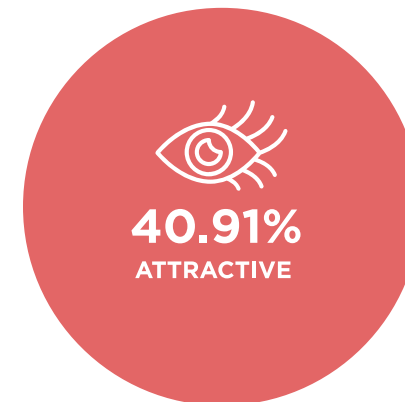
11. Personality Association

Survey participants were asked what their three most favorable words would be to describe the personality of the City of Sunny Isles Beach.

An impressive 40% of the participants mentioned the word “Attractive” and just over a third (34%) mentioned the term “Family-Oriented” to describe the personality of the City. About a fifth of the participants responded with the words “Friendly” (22%), “Outdoorsy” (21%), “Contemporary” (19%), “Bright” (18%), and “Glamorous” (17%) when choosing a word to describe the personality of the City.

The words “Sophisticated” (15%), “Trendy” (13%), “Confident” (11%), and “Cheerful” (11%) were also mentioned by more than 10% of the survey participants.

Interestingly, only 31% of those who only worked in the City (vs. 40%) mentioned the word “Attractive”.



Attractive	40.91%
Family-Oriented	33.69%
Friendly	22.42%
Outdoorsy	21.36%
Contemporary	19.66%
Bright	17.96%
Glamorous	17.43%
Sophisticated	14.77%
Trendy	12.75%
Cheerful	11.37%
Confident	11.37%
Reliable	10.95%
Cool	8.18%
Other	5.95%
Exciting	4.57%
Wholesome	3.19%
Imaginative	2.66%
Hardworking	2.55%
Other	2.44%
Leader	2.23%
Tough	2.13%
Sincere	1.17%
Other	0.85%

Other

- Comfortable
- Secure
- Upscale
- Convenient

PERSONALITY TRAITS BY RESIDENCY

Resident	Yes	No	Grand Total
Q11 - Attractive	18%	15%	16%
Q11 - Family Oriented	14%	13%	13%
Q11 - Friendly	10%	8%	9%
Q11 - Outdoorsy	4%	8%	8%
Q11 - Contemporary	4%	8%	7%
Q11 - Bright	8%	7%	7%
Q11 - Glamorous	3%	7%	7%
Q11 - Sophisticated	4%	6%	6%
Q11 - Trendy	4%	5%	5%
Q11 - Cheerful	8%	4%	4%
Q11 - Confident	7%	4%	4%
Q11 - Reliable	6%	4%	4%
Q11 - Cool	4%	3%	3%
Q11 - Exciting	3%	2%	2%
Q11 - Wholesome	1%	1%	1%
Q11 - Imaginative	0%	1%	1%
Q11 - Hardworking	1%	1%	1%
Q11 - Leader	1%	1%	1%
Q11 - Tough	0%	1%	1%
Q11 - Sincere	1%	0%	0%
0	100%	100%	100%

Personality traits by residency does seem to make a difference:

- Residents scored Outdoorsy and Contemporary really low (4%) while non-residents rated it twice as high.
- Residents chose Cheerful and Confident twice as much as non-residents
- Residents also don't think that SIB is glamorous (3%) while non-residents do (7%)

PERSONALITY TRAITS BY: AGE GROUP

	(01) 14-18	(02) 19-34	(03) 35 - 49	(04) 50 - 64	(05) 65+	NA	Grand Total
Q11 - Attractive	13%	11%	16%	16%	17%	8%	16%
Q11 - Family Oriented	6%	19%	15%	14%	8%	15%	13%
Q11 - Friendly	6%	6%	7%	7%	12%	15%	9%
Q11 - Outdoorsy	6%	6%	6%	10%	9%	12%	8%
Q11 - Contemporary	0%	5%	6%	9%	8%	8%	7%
Q11 - Bright	13%	7%	8%	7%	6%	0%	7%
Q11 - Glamorous	0%	8%	8%	7%	5%	8%	7%
Q11 - Sophisticated	13%	7%	6%	6%	4%	4%	6%
Q11 - Trendy	0%	5%	6%	4%	5%	4%	5%
Q11 - Cheerful	0%	2%	3%	5%	5%	8%	4%
Q11 - Confident	6%	6%	6%	3%	3%	4%	4%
Q11 - Reliable	19%	4%	4%	3%	5%	8%	4%
Q11 - Cool	0%	3%	4%	2%	3%	4%	3%
Q11 - Exciting	0%	1%	2%	2%	3%	0%	2%
Q11 - Wholesome	6%	2%	1%	1%	2%	0%	1%
Q11 - Imaginative	6%	1%	0%	1%	1%	4%	1%
Q11 - Hardworking	0%	2%	1%	1%	1%	0%	1%
Q11 - Leader	6%	2%	0%	1%	1%	0%	1%
Q11 - Tough	0%	1%	0%	1%	1%	0%	1%
Q11 - Sincere	0%	1%	0%	0%	1%	0%	0%
0	100%	100%	100%	100%	100%	100%	100%

There are significant differences in personality traits associated with SIB and age.



- The youngest group associates with Reliable, Attractive, Bright and Sophisticated



- The middle groups associate SIB with Attractive and Family oriented primarily, then more weakly with Outdoorsy and Contemporary



- Older respondents associate SIB with Attractive and Friendly; Residents 65 and older were less likely to mention the term "Family Oriented" (21% vs. 34%).

Russian speakers were more like to mention the word "Friendly" (34%) than other survey participants. Spanish speakers were nearly three times more likely to mention the word "Confident" (28% vs. 11%) than other respondents to describe the City's personality.

PERSONALITY TRAITS BY: LENGTH OF RESIDENCE

How Long Lived	(01) <1 yr	(02) 1-5 yrs	(03) 6-9 yrs	(04) 10-14 yrs	(05) 15-19 yrs	(06) 20-25 yrs	(07) 25+ yrs	NA	(blank)	Grand Total
Q11 - Attractive	5%	16%	14%	15%	18%	16%	17%	27%	14%	16%
Q11 - Bright	5%	7%	6%	9%	7%	6%	6%	20%	5%	7%
Q11 - Cheerful	10%	3%	3%	5%	6%	5%	6%	13%	3%	4%
Q11 - Confident	10%	5%	4%	2%	3%	5%	5%	13%	6%	4%
Q11 - Contemporary	3%	7%	10%	7%	9%	7%	5%	0%	9%	7%
Q11 - Cool	3%	4%	3%	2%	3%	3%	5%	0%	3%	3%
Q11 - Exciting	3%	2%	3%	3%	2%	2%	1%	0%	2%	2%
Q11 - Family Oriented	18%	13%	13%	12%	12%	12%	14%	0%	13%	13%
Q11 - Friendly	3%	7%	9%	10%	8%	10%	9%	0%	9%	9%
Q11 - Glamorous	8%	7%	7%	8%	3%	4%	6%	0%	10%	7%
Q11 - Hardworking	0%	1%	1%	1%	1%	2%	0%	7%	1%	1%
Q11 - Imaginative	3%	1%	1%	2%	2%	1%	0%	0%	1%	1%
Q11 - Leader	0%	2%	0%	1%	0%	1%	1%	0%	1%	1%
Q11 - Outdoorsy	13%	8%	10%	6%	7%	10%	8%	7%	8%	8%
Q11 - Reliable	5%	4%	4%	3%	5%	6%	3%	7%	5%	4%
Q11 - Sincere	3%	1%	0%	1%	0%	0%	1%	0%	0%	0%
Q11 - Sophisticated	3%	6%	5%	6%	8%	3%	6%	0%	5%	6%
Q11 - Tough	0%	1%	1%	0%	1%	1%	1%	0%	1%	1%
Q11 - Trendy	8%	6%	3%	5%	5%	4%	5%	7%	5%	5%
Q11 - Wholesome	0%	1%	2%	1%	1%	3%	1%	0%	1%	1%
0	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

As one can expect, there are big differences by the amount of time that people have lived in the City of Sunny Isles Beach.



- Relative newcomers associate the City with “Family Oriented,” “Outdoorsy,” “Cheerful” and “Confident.”
- People who’ve lived in the City 10-20 years associate it with “Attractive,” “Family-oriented,” and “Friendly and Contemporary.”
- People who’ve lived in the City over 20 years still find it attractive, family-oriented and friendly but no longer exciting, it seems.

The bottom line: The key associations overall are “Attractive”, “Family-oriented”, “Friendly” and “Outdoorsy.”

12. Emotional Association

Participants were asked to choose three words to best describe their positive emotions regarding the City. Their answers were very consistent across all survey groups. Impressively, more than half of the survey participants chose the words “Security” (56%) and “Comfort” (51%) when selecting words to describe positive emotions associated with the City. Significantly as well, more than one third (35%) mentioned “Calmness” while around a fifth of the participants mentioned “Satisfaction” (23%), “Joy” (22%), and “Pride” (17%). Also of note, “Admiration” (13%) and “Excitement” (12%) were mentioned by more than 10% of the participants.



Security	55.58%
Comfort	50.69%
Calmness	35.18%
Satisfaction	22.95%
Joy	21.68%
Pride	16.68%
Admiration	12.65%
Excitement	12.01%
Interest	9.56%
Nostalgia	8.82%
Affection	8.29%
Awe	6.70%
Romance	4.04%
Other	3.08%
Other	1.59%
Other	0.64%

Other

- Relaxing
- Friendly
- Happy
- Home



POSITIVE EMOTIONS					
Positive Emotions	English	Spanish	Russian	7 Other Languages	Grand Total
Security	20%	20%	23%	24%	21%
Comfort	18%	17%	28%	20%	19%
Calmness	12%	18%	12%	11%	13%
Satisfaction	9%	7%	10%	9%	9%
Joy	7%	9%	9%	12%	8%
Pride	7%	6%	4%	5%	6%
Admiration	4%	7%	3%	7%	5%
Excitement	5%	4%	4%	4%	5%
Interest	5%	2%	2%	3%	4%
Nostalgia	5%	2%	1%	2%	3%
Affection	3%	3%	3%	3%	3%
Awe	3%	3%	1%	0%	3%
Romance	2%	1%	1%	2%	2%
	100%	100%	100%	100%	100%

POSITIVE EMOTIONS BY: RESIDENT VS. NON-RESIDENT			
Resident	Yes	No	Grand Total
Q12 - Security	20%	21%	21%
Q12 - Comfort	18%	19%	19%
Q12 - Calmness	12%	13%	13%
Q12 - Satisfaction	8%	9%	9%
Q12 - Joy	12%	8%	8%
Q12 - Pride	3%	7%	6%
Q12 - Admiration	6%	5%	5%
Q12 - Excitement	7%	4%	5%
Q12 - Interest	3%	4%	4%
Q12 - Nostalgia	3%	3%	3%
Q12 - Affection	4%	3%	3%
Q12 - Awe	1%	3%	3%
Q12 - Romance	2%	2%	2%

The following are a few interesting observations regarding the data gleaned from this question:

- **Security:** The word “Security” was mentioned more frequently by Russian speakers than other participants (65% vs. 55%).
- **Comfort:** Interestingly, while the word “Comfort” was mentioned by 51% of the overall survey sample, an impressive 76% of the Russian speakers mentioned “Comfort” while just 31% of the participants that only worked in the City mentioned the word “Comfort”.

There are two notable differences between residents and non-residents:



Joy

Residents feel joy much more than non-residents (12% to 8%).



Pride

Residents don't feel much pride (3% to 7%) as compared to non-residents. This would be a valuable metric to improve upon in future campaigns

POSITIVE EMOTIONS BY: HOUSEHOLD INCOME

Household Income	(1) \$15,000	(2) \$25,000	(3) \$35,000	(4) \$49,999	(5) \$74,999	(6) \$99,999	(7) \$149,999	(8) \$199,999	(9) \$200,000+	NA	Grand Total
Q12 - Security	19%	16%	23%	26%	19%	22%	21%	24%	18%	21%	21%
Q12 - Comfort	14%	19%	14%	20%	20%	19%	19%	20%	19%	21%	19%
Q12 - Calmness	22%	12%	20%	14%	16%	14%	12%	11%	11%	11%	13%
Q12 - Satisfaction	7%	8%	8%	9%	7%	7%	6%	8%	12%	11%	9%
Q12 - Joy	8%	14%	9%	5%	10%	7%	7%	7%	7%	10%	8%
Q12 - Pride	5%	5%	6%	4%	6%	6%	10%	9%	6%	5%	6%
Q12 - Admiration	10%	9%	6%	4%	6%	5%	5%	2%	4%	4%	5%
Q12 - Excitement	4%	7%	2%	4%	4%	4%	6%	6%	6%	3%	5%
Q12 - Interest	1%	1%	4%	1%	4%	5%	5%	4%	3%	4%	4%
Q12 - Nostalgia	1%	1%	1%	6%	3%	3%	3%	3%	4%	4%	3%
Q12 - Affection	7%	5%	3%	4%	3%	4%	2%	0%	3%	4%	3%
Q12 - Awe	1%	1%	1%	2%	1%	1%	4%	4%	4%	2%	3%
Q12 - Romance	0%	1%	4%	1%	2%	2%	1%	3%	2%	1%	2%
0	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

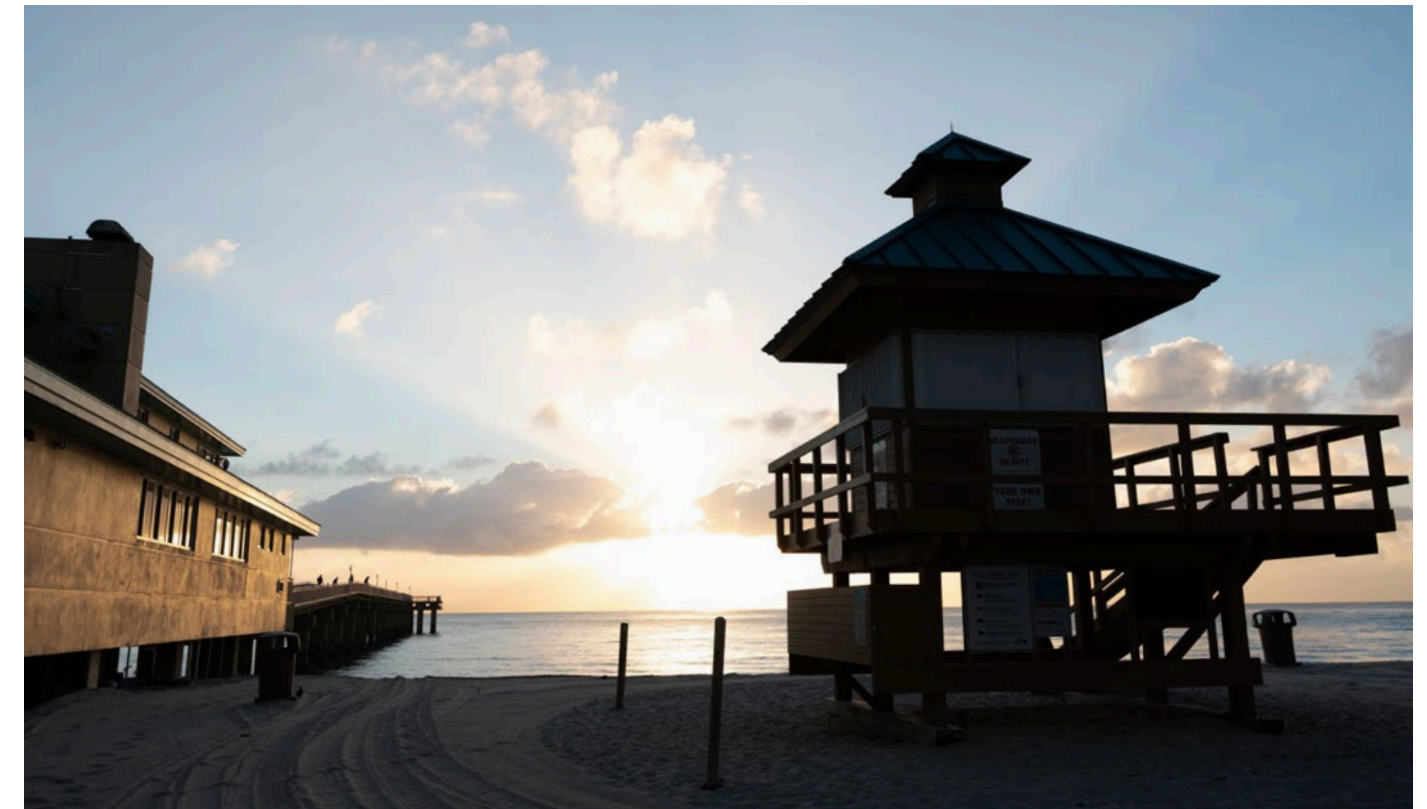
When segmented by income, there weren't major differences, but some interesting points:

- "Admiration" is high for the lowest bracket.
- "Joy" is number three for the \$15-\$25k group, over "Calmness."
- "Joy" and "Pride" show up in the middle-income groups.
- Among the \$200k+ segment, "Satisfaction" is number 3 with "Calmness" number 4.
- "Security," "Comfort" and "Calmness" are the hands-down favorite words and the difference between number 3, "Calmness," and number 4, "Satisfaction," is large, almost a 50% difference.
- Except for a couple of differences ("Joy" is number 3 among those in the \$25-\$35k, group; "Satisfaction" is the #3 among the \$200k+) the top three words are the same for everyone.

POSITIVE EMOTIONS BY: EAST/WEST OF COLLINS

East/West of Collins	East	West	Non-Residents	Grand Total
Q12 - Security	21%	22%	19%	21%
Q12 - Comfort	21%	19%	17%	19%
Q12 - Calmness	13%	14%	11%	13%
Q12 - Satisfaction	9%	9%	8%	9%
Q12 - Joy	10%	8%	7%	8%
Q12 - Pride	4%	8%	6%	6%
Q12 - Admiration	5%	4%	6%	5%
Q12 - Excitement	5%	4%	6%	5%
Q12 - Interest	3%	3%	8%	4%
Q12 - Nostalgia	2%	4%	3%	3%
Q12 - Affection	3%	3%	2%	3%
Q12 - Awe	2%	2%	5%	3%
Q12 - Romance	1%	1%	2%	2%
0	100%	100%	100%	100%

When segmenting the data on those that live East and West of Collins, those living East of Collins say they do not associate (or feel) "pride" as much as those living West of Collins (4% vs 8%).

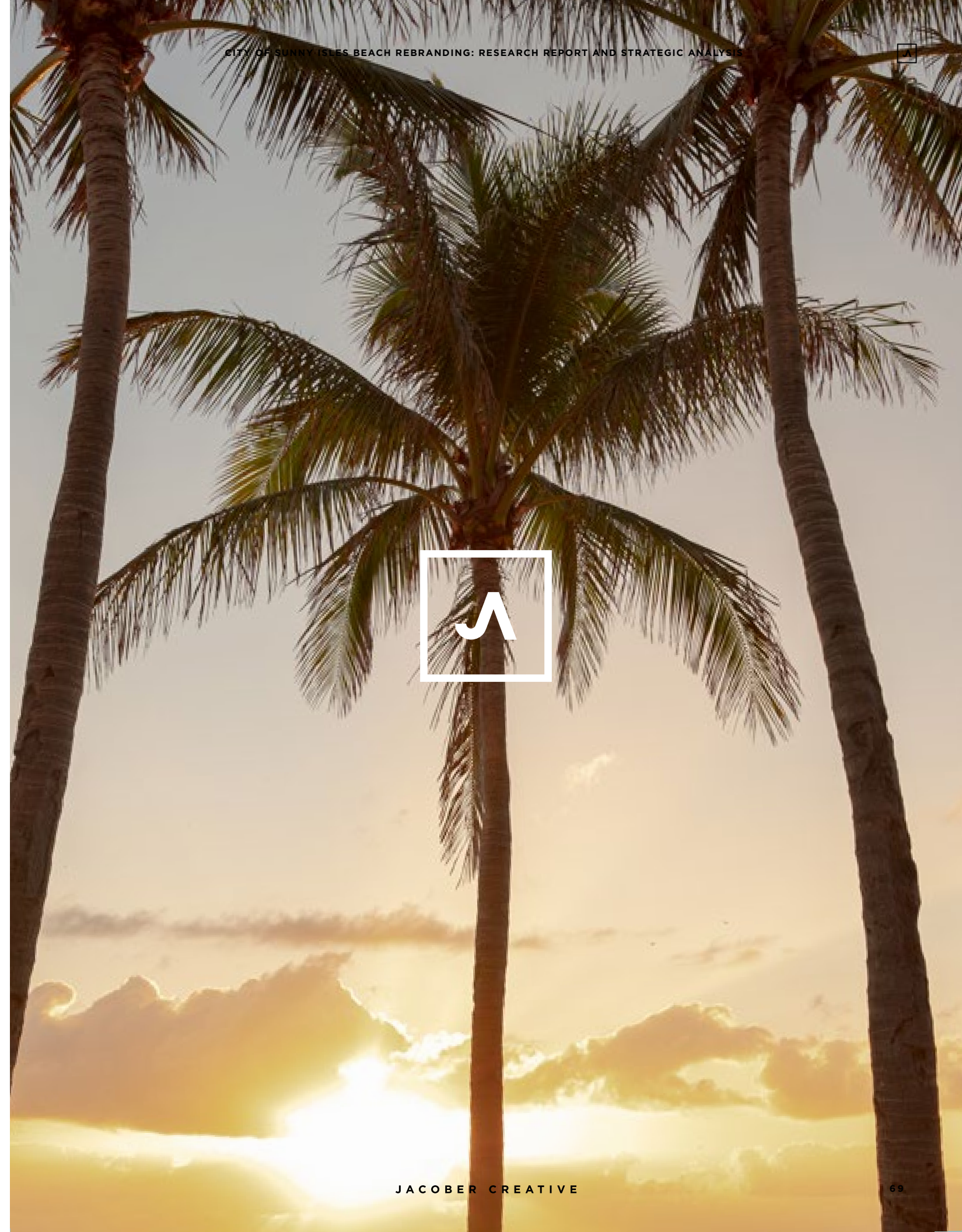


There are differences when one looks at the time living at SIB:

- Oddly, there is 0% pride among people living at SIB less than a year, then it grows to 5%-6% with time and is felt strongly from 20 years on.
- While long-termers do feel more pride, the report significantly less Satisfaction

POSITIVE EMOTIONS BY: LENGTH OF RESIDENCY

How Long Lived	<1 yr	1-5 yrs	6-9 yrs	10-14 yrs	15-19 yrs	20-25 yrs	25+ yrs	NA	(blank)	Grand Total
Security	21%	20%	22%	22%	23%	20%	20%	14%	19%	21%
Comfort	21%	19%	20%	20%	18%	18%	16%	14%	23%	19%
Calmness	18%	15%	12%	11%	15%	13%	13%	21%	11%	13%
Satisfaction	6%	10%	9%	9%	9%	6%	8%	7%	9%	9%
Joy	12%	8%	9%	8%	8%	5%	7%	0%	10%	8%
Pride	0%	5%	6%	5%	6%	11%	12%	0%	3%	6%
Admiration	6%	5%	4%	5%	4%	7%	3%	7%	5%	5%
Excitement	9%	5%	4%	6%	3%	5%	3%	7%	6%	5%
Interest	0%	4%	6%	3%	3%	2%	5%	0%	4%	4%
Nostalgia	0%	1%	1%	3%	3%	6%	9%	0%	4%	3%
Affection	3%	4%	2%	4%	4%	3%	3%	14%	2%	3%
Awe	3%	3%	3%	4%	2%	1%	0%	14%	3%	3%
Romance	3%	2%	1%	1%	1%	2%	1%	0%	3%	2%
0	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

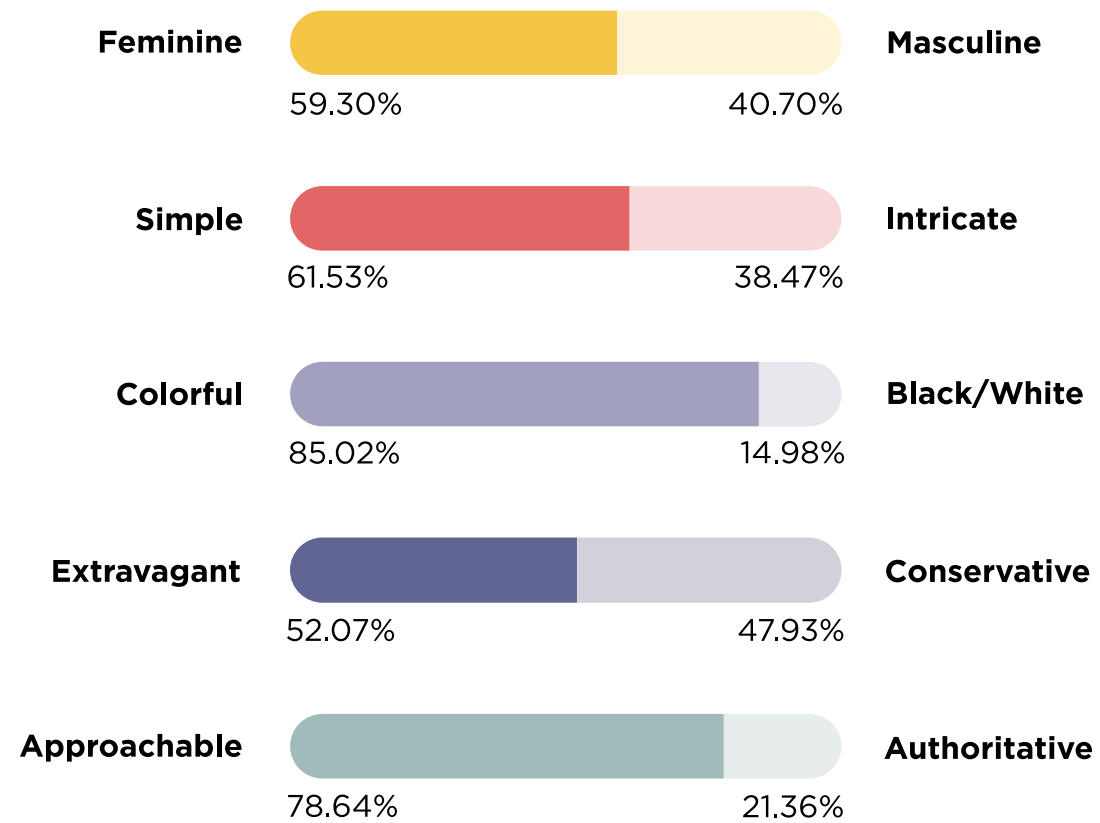


13. City Characteristics

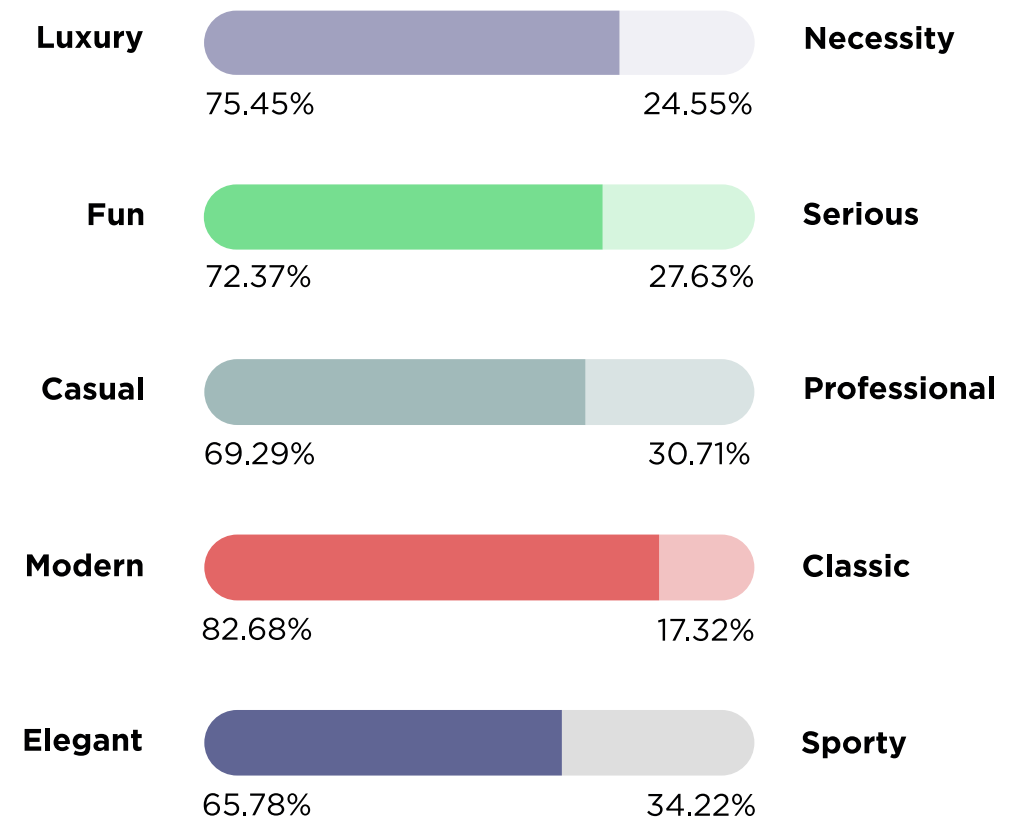
Participants were asked to choose between contrasting characteristics presented that best describe their image of the City of Sunny Isles Beach.

Overwhelmingly, study participants considered the City image more “colorful, modern, approachable, luxurious, fun, casual, elegant, simple, and feminine” than the selected contrasting characteristics.

Narrowly, and not of significance, participants selected “Extravagant” over “Conservative” (52% compared to 48%) when considering their image of the City.



The city is perceived as being much more colorful rather than black & white.



Respondents felt the city was much more modern rather than classic.



TOTAL PERSONALITY TRAITS RANKED BY OVERALL SCORE

Character Traits	Live East of Collins	Live West of Collins	Live Total	Live & Work East of Collins	Live & Work West of Collins	Live & Work Total	Visitor Total	Work but does not live	Grand Total
Colorful	9%	8%	8%	8%	9%	8%	9%	9%	9%
Modern	9%	8%	8%	8%	9%	9%	9%	9%	8%
Approachable	8%	8%	8%	7%	8%	8%	8%	7%	8%
Luxury	8%	7%	7%	7%	7%	7%	8%	9%	8%
Fun	7%	7%	7%	7%	7%	7%	8%	7%	7%
Casual	7%	7%	7%	7%	7%	7%	7%	6%	7%
Elegant	6%	7%	6%	6%	7%	7%	6%	8%	7%
Simple	6%	6%	6%	6%	6%	6%	7%	6%	6%
Feminine	6%	6%	6%	6%	7%	7%	6%	5%	6%
Extravagant	5%	5%	5%	6%	4%	5%	5%	5%	5%
Conservative	5%	5%	5%	4%	6%	5%	5%	5%	5%
Masculine	4%	4%	4%	4%	3%	3%	4%	5%	4%
Intricate	4%	4%	4%	4%	4%	4%	3%	4%	4%
Sporty	4%	3%	4%	4%	3%	3%	4%	2%	3%
Professional	3%	3%	3%	3%	3%	3%	3%	4%	3%
Serious	3%	3%	3%	3%	3%	3%	2%	3%	3%
Necessity	2%	3%	3%	3%	3%	3%	2%	1%	2%
Authoritative	2%	2%	2%	3%	2%	2%	2%	3%	2%
Classic	1%	2%	2%	2%	1%	1%	1%	1%	2%
Black/White & Grey	1%	2%	2%	2%	1%	2%	1%	1%	1%

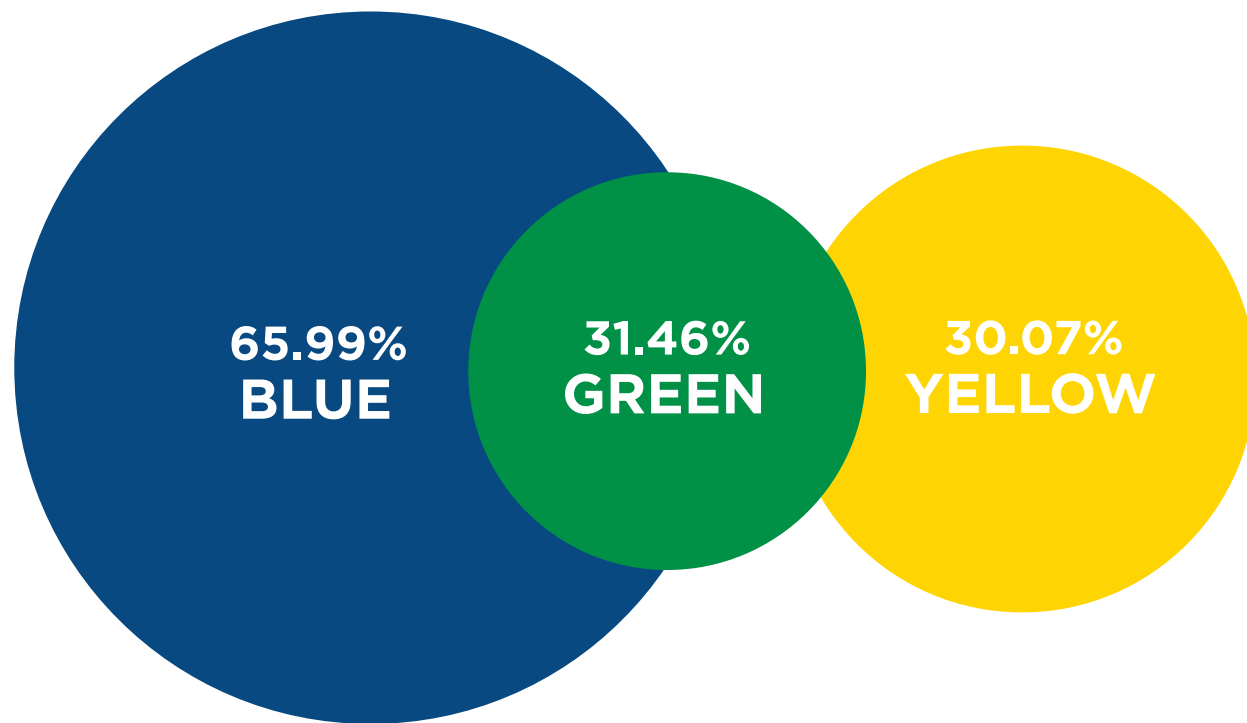




14. City Colors

Participants were asked to select from eight choices (Blue, Red, Yellow, White, Purple, Orange, Green, and Black) which colors they most associated with the City of Sunny Isles Beach.

Five of the eight colors were selected by more than 20% of the participants. Selected by an overwhelming majority of participants, Blue was the number one choice by research participants and mentioned by fully 66% of the overall study sample. The other four most selected colors were Green (31%), Yellow (30%), White (29%), and Orange (20%). These were fairly tightly packed together, but nonetheless, impressive in their selection.



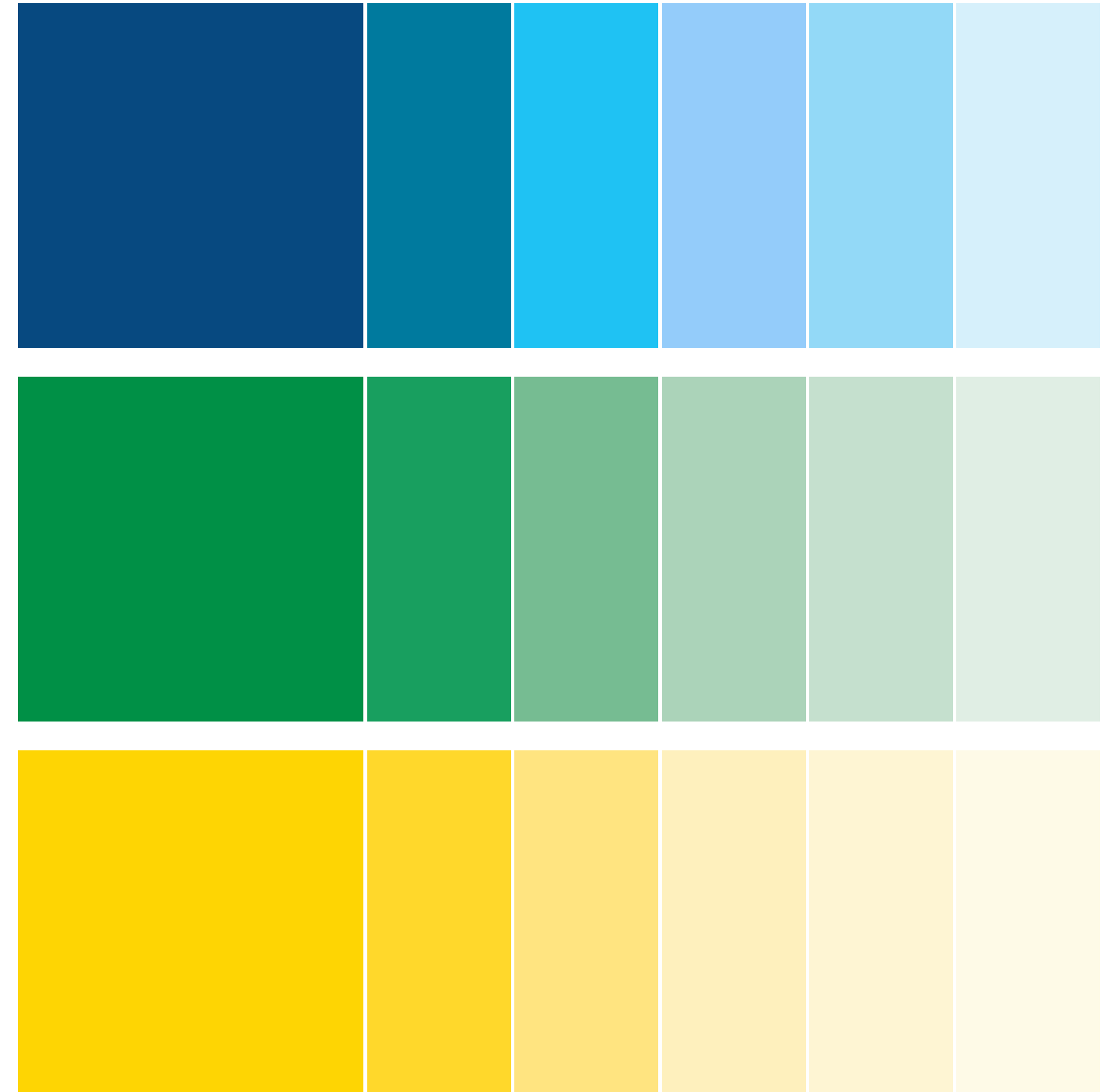
White	29.22%
Orange	19.87%
Other	5.74%
Red	5.42%
Purple	5.31%
Black	4.78%

☆

Other

- Pink
- Turquoise
- Beige/Sand
- Silver/Grey

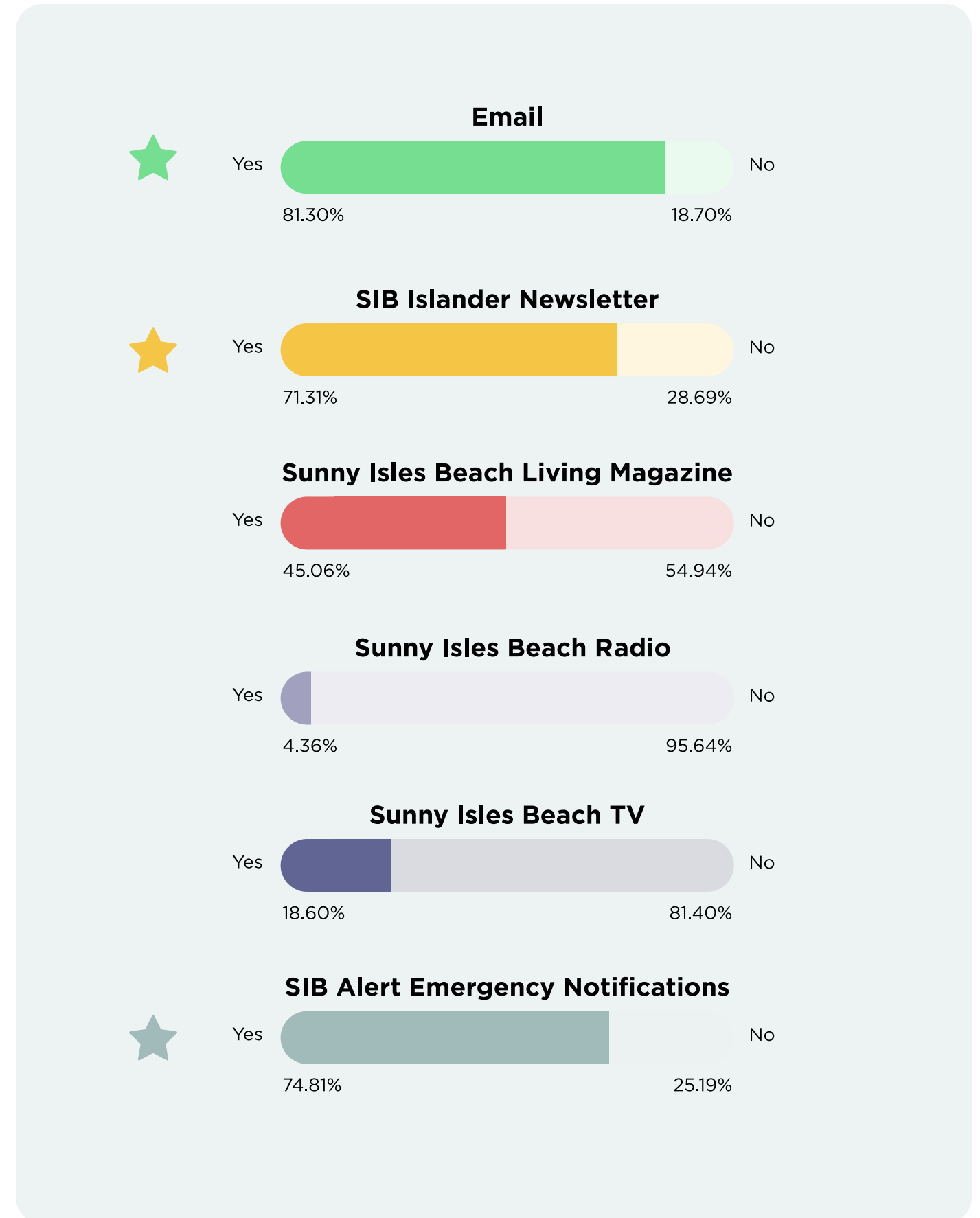
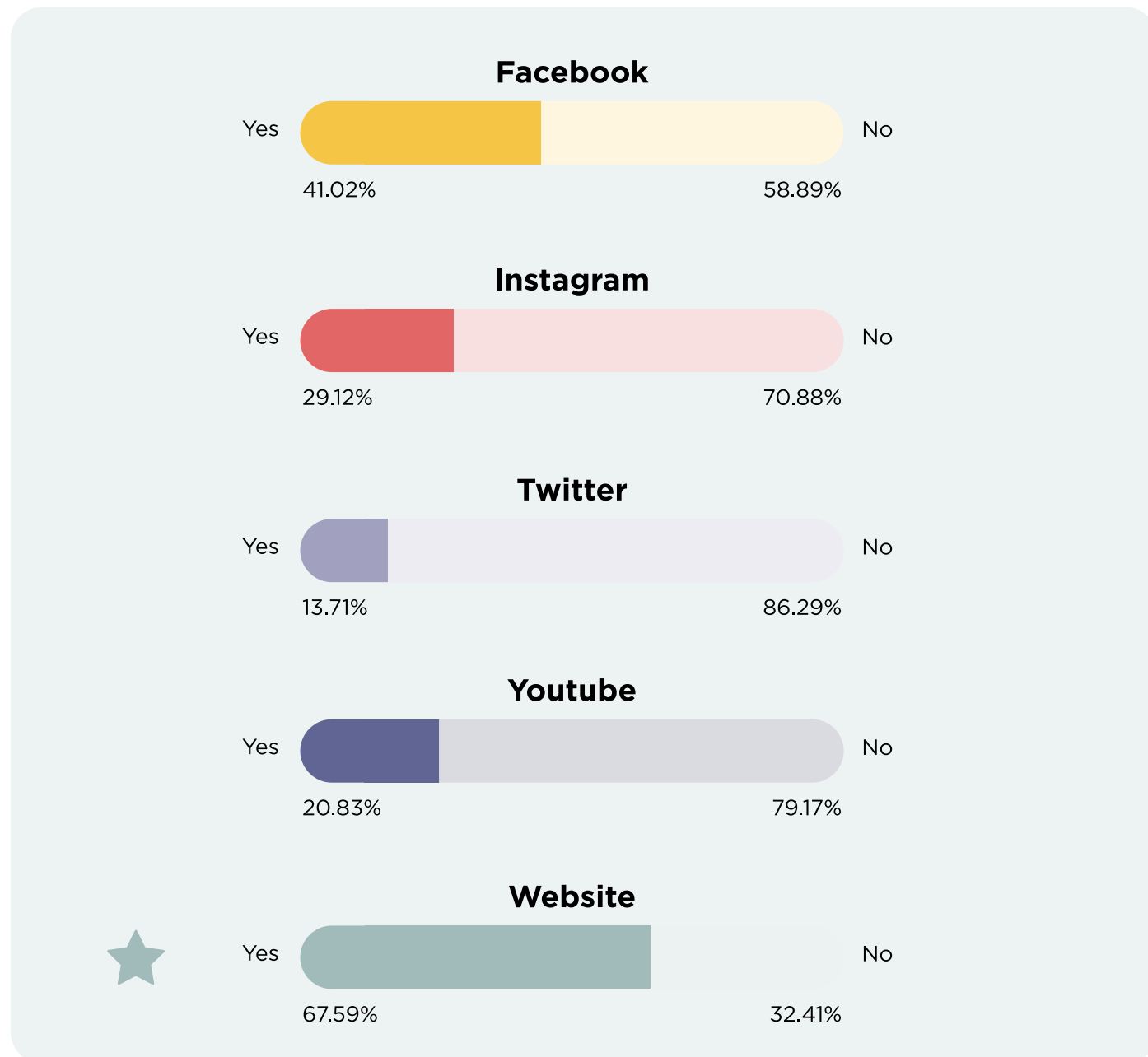
RANGE OF COLOR PALETTES



15. Communication Channels

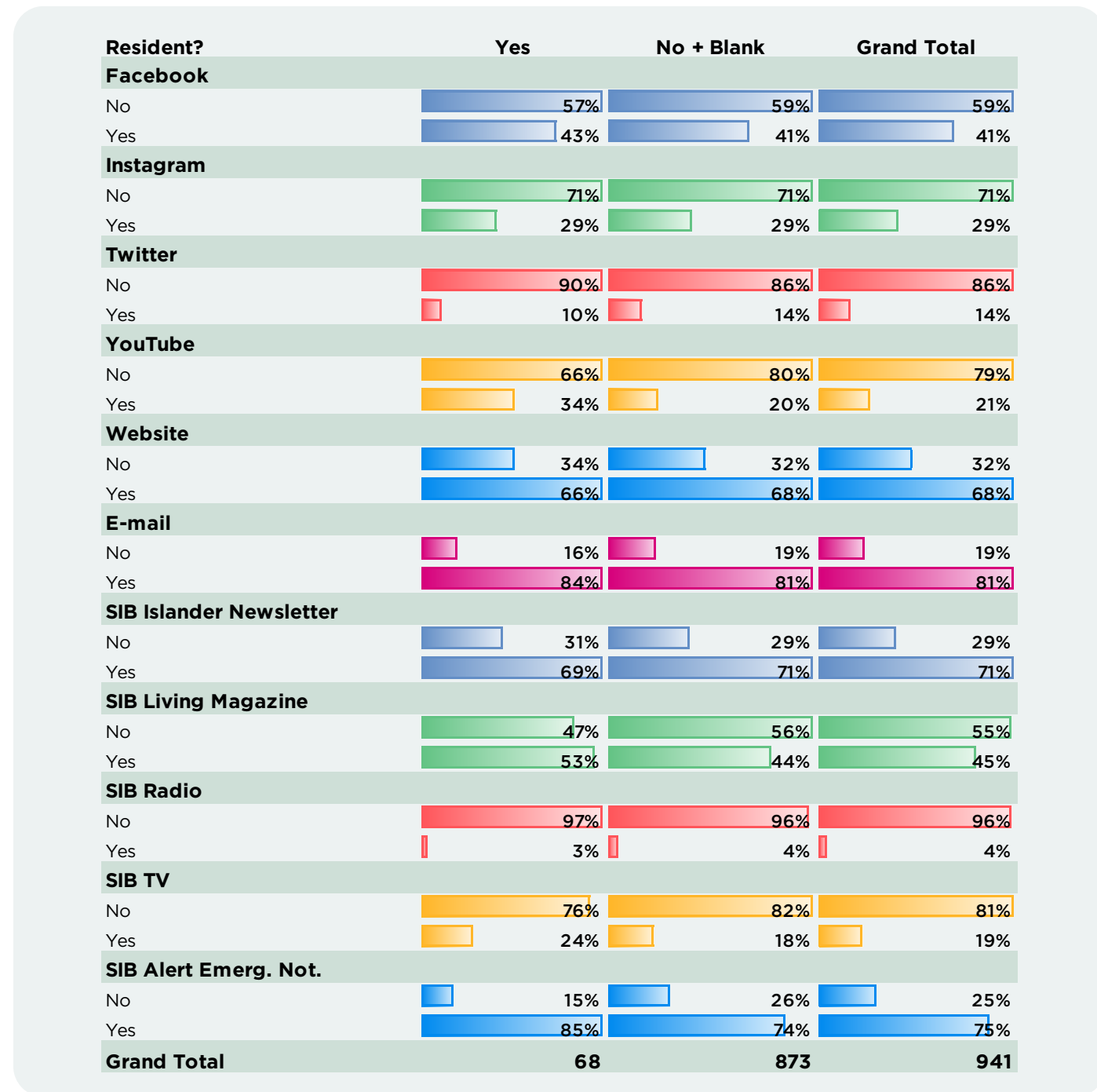
Survey participants were polled regarding which of the available communications offered by the City of Sunny Isles Beach they used to receive news about the City. The following table shows what percentage of the participants made use of each of those channels.

Evaluating the use of these channels among survey participants should not be based on side-by-side comparisons of usage, only in their specific outreach. Each communications channel should be viewed on its own because they are different platforms used for different purposes. All but a couple of them (Twitter and Sunny Isles Beach Radio) are well used on their own.



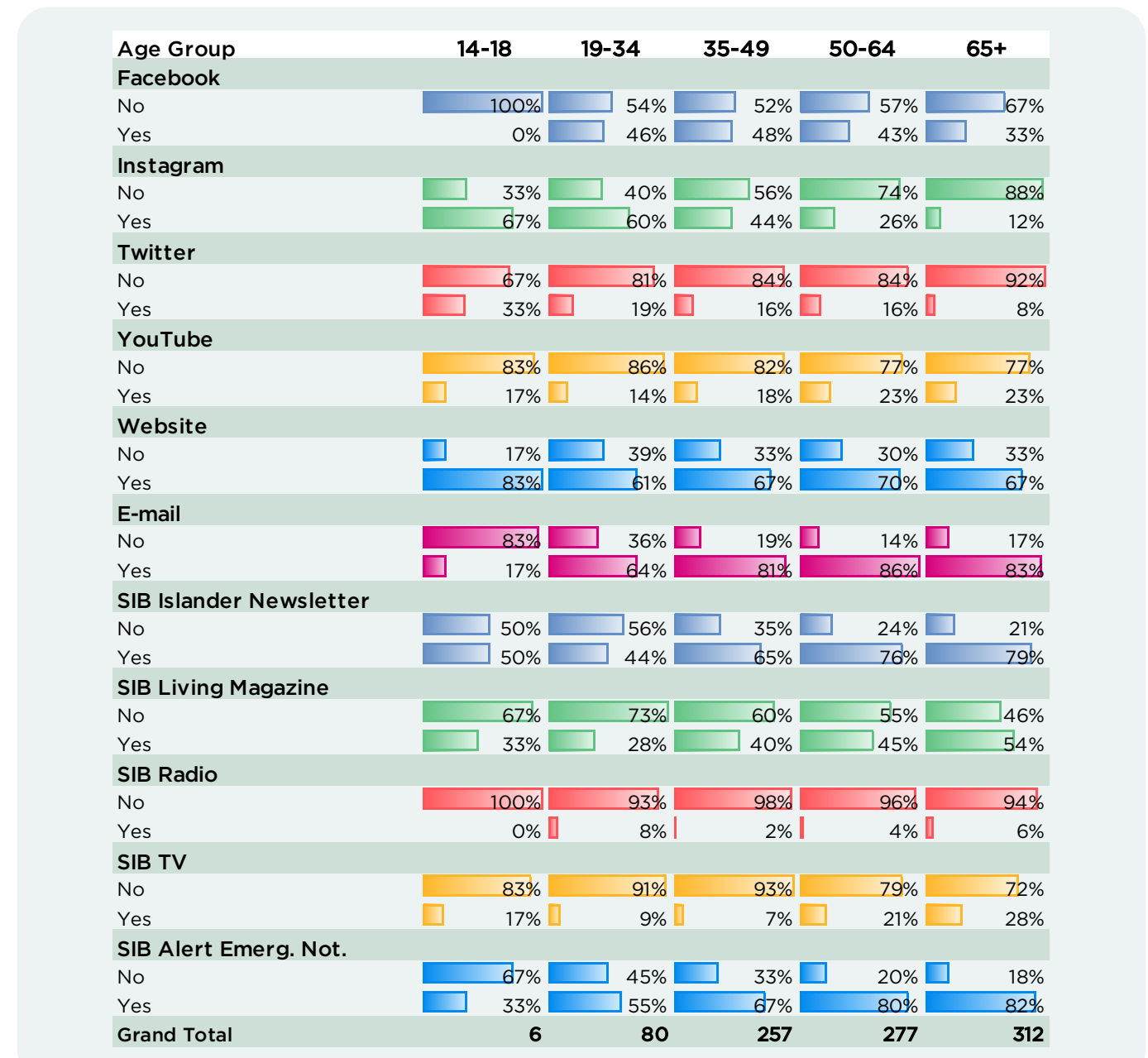
When looking at Residents vs. Non-Residents:

- Facebook is the choice social media source. Instagram, Twitter and YouTube are not consulted as much.
- About two-thirds of residents consult the website.
- Email and the newsletter are popular ways of getting information from the City.
- SIB Radio scores the lowest of all communication channels.
- A surprising amount of people watch SIB TV, though the question really is not a proxy for ratings, so be aware.
- Most everyone gets the alerts.



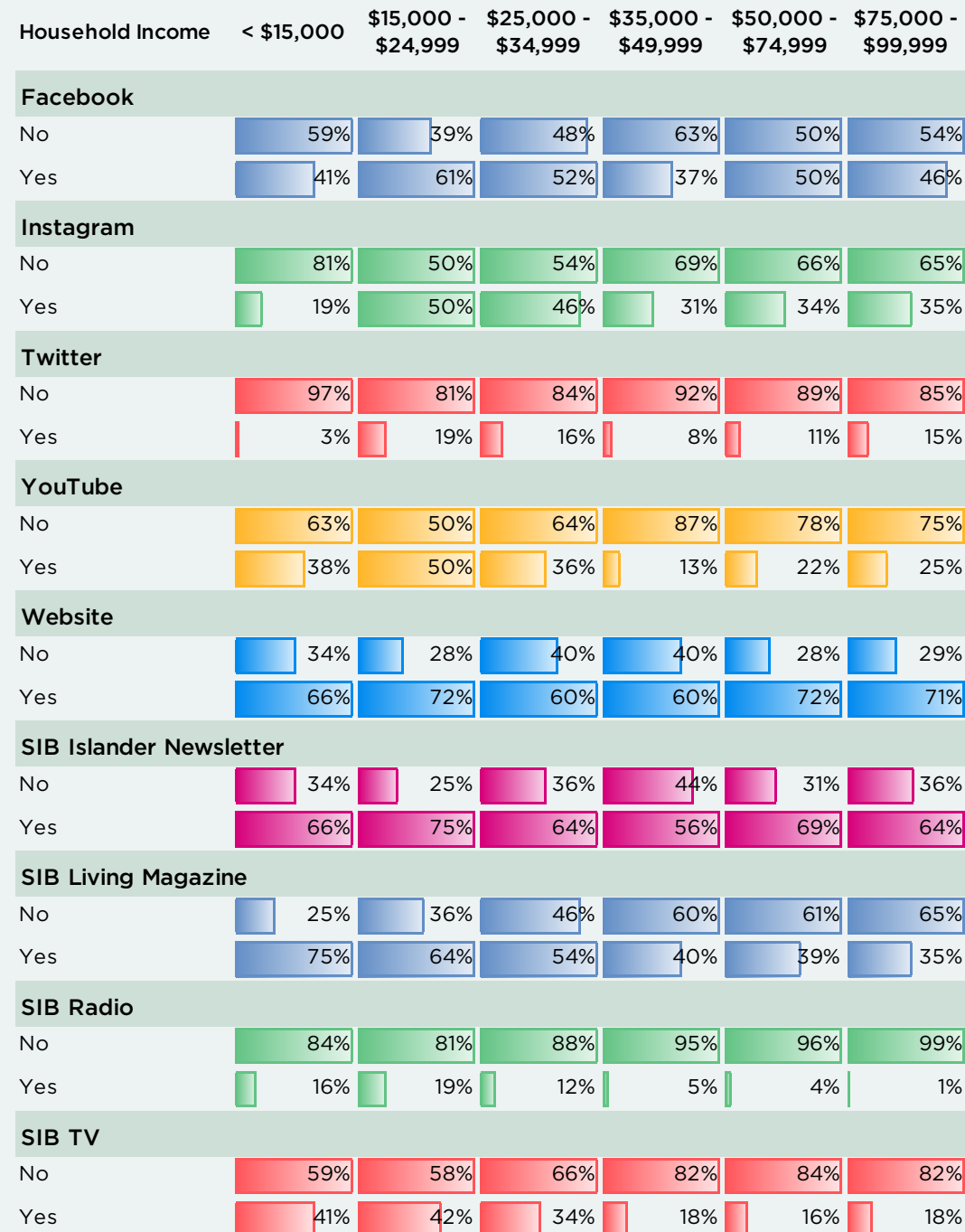
When looking at communication channel usage by age group:

- Facebook is more popular among younger segments than among older. The “yes” falls from 46% to 33%. The 14-18 age group is just too small at only eight people to make credible conclusions. Instagram is mainly used by the younger segments, and it also has an important presence among the 19-49 group.
- Twitter is very limited, even among the 19-34 demographic, which uses it more than other segments, but still not a lot.
- Stronger YouTube usage with the 50+ set.
- The website is popular with everyone.
- Email is popular with everyone except the eight 14-18 group surveyed, and the usage increases with age.
- The newsletter becomes more popular with age, from 44% in the 19-34 group to 79% in the 65+ group.
- The SIB Living Magazine is also popular with the older crowd.
- The radio continues to be unpopular, and only the older segments gravitate toward SIB TV.



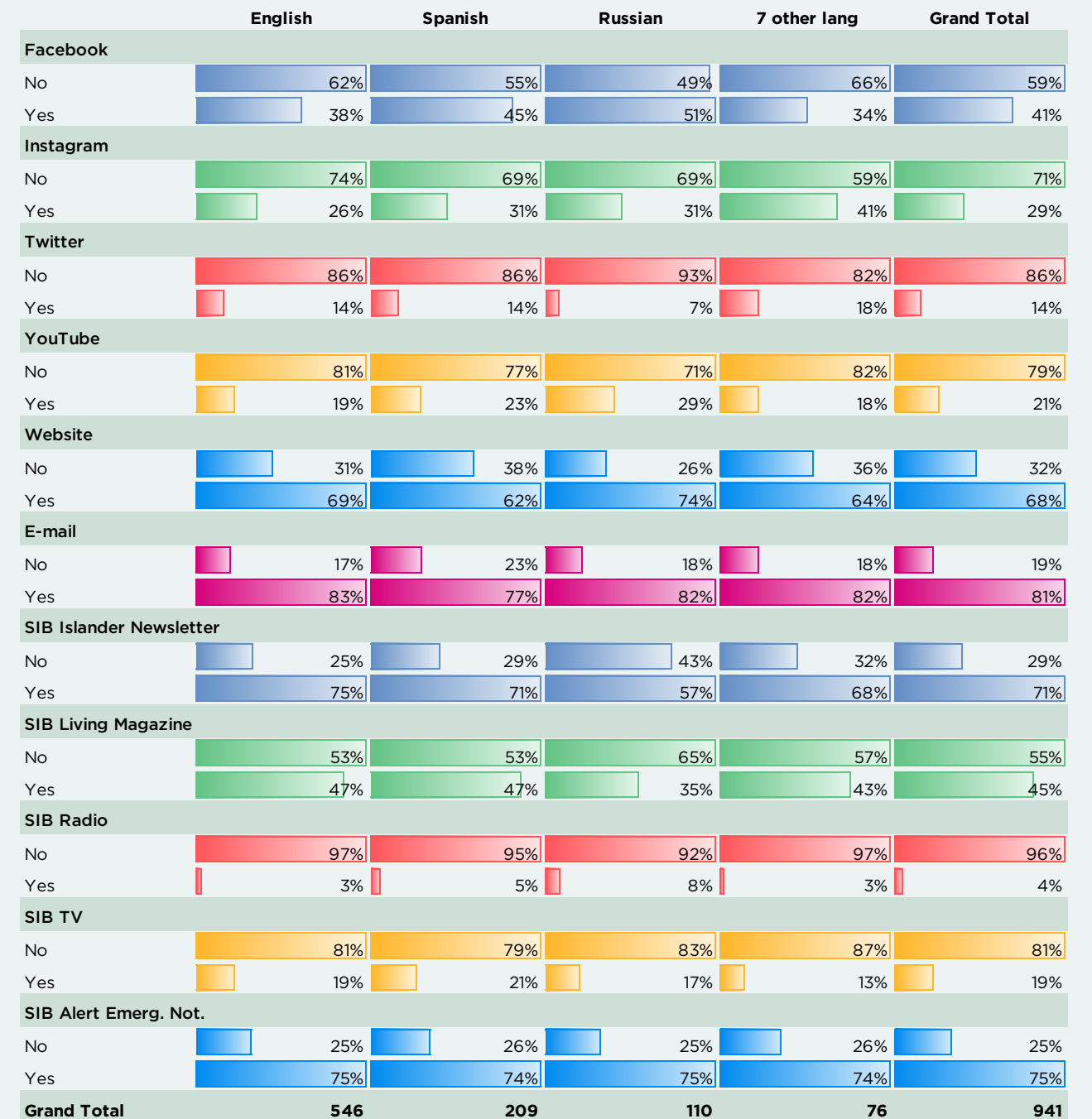
When comparing communication channels across different income brackets:

- Social media usage declines with income (with the caveat that of the 941 respondents, 211 declined to give their income).
- The website is popular across all income groups.
- Email is popular across all income groups, though it increases a bit with income.
- The rest of media usage and popularity follows the same patterns seen before.



Communication Channels by Language

- Russian and Spanish language households tend to consult Facebook more than English speakers for their communication with the City.
- Instagram is less popular than Facebook, but not as unpopular as Twitter and YouTube.
- Interestingly, the two “native” forms of communication for SIB, website and email, do really well, the email much better than the website.



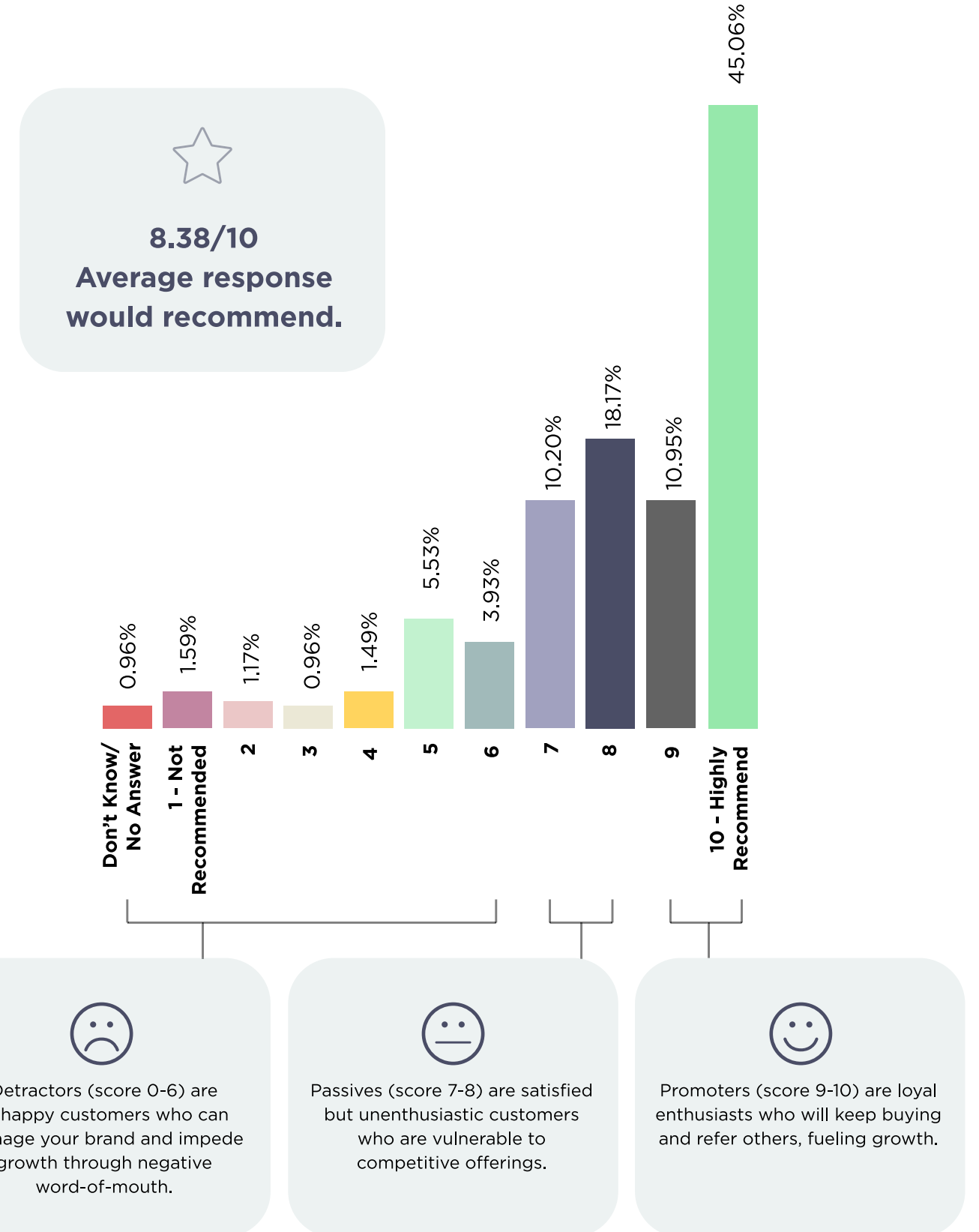
16. Net Promoter Score

Study participants were asked, “How likely are you to recommend the City of Sunny Isles Beach as a place to live or work to friends or family?”

Participants from all segments of the study overwhelmingly recommend the City as a place to live or work. Overall, 84% of all study participants recorded a score of 7 or higher on a scale of 1-10, where 10 equals highly recommend, and 1 equals not recommend. The overall average score was 8.377 on the ten-point scale.

A very large 45% of all participants recorded a perfect “10”. Conversely, only 4% of the survey respondents recorded a “3” or under. What is most significant is that the scores are high. The City of Sunny Isles Beach residents are a very satisfied population.

When translated to a “Net Promoter Score” (NPS) where the surveyed population is segmented into Promoters (scores of 9-10), Passive (scores of 7-8), and Detractors (scores of 0-6), 57% of the surveyed population are Promoters and 15% are Detractors, for a Net Promoter Score of 42. The range of scores under a Net Promoter Score spectrum range from -100 to 100.



	NPS	Index
Grand Total	42.30	100
Primary Language at Home		Index
English	32.23	76
Spanish	58.37	138
Russian	56.36	133
7 Other Lang	50.00	118
Resident		Index
Yes	67.65	160
No	40.32	95
Age Group		Index
14-18	33.33	79
19-34	36.25	86
35-49	48.25	114
50-64	38.99	92
65+	43.59	103
Live or Work		Index
Live	43.63	103
Live & Work	54.26	128
Visitor	29.73	70
Work - Not Live	25.37	60
Residency		Index
Part Time	35.71	84
Year-round	47.06	111
Location		Index
East of Collins	47.51	112
West of Collins	43.60	103
How long lived or worked		Index
< 1 year	62.96	149
1 to 5 years	45.63	108
6 to 9 years	44.94	106
10 to 14 years	39.07	92
15 to 19 years	40.40	96
20 to 25 years	40.19	95
25 years +	42.11	100
Total HH Income		Index
< \$15,000	59.38	140
\$15,000 - \$24,999	55.56	131
\$25,000 - \$34,999	68.00	161
\$35,000 - \$49,999	50.00	118
\$50,000 - \$74,999	48.25	114
\$75,000 - \$99,999	39.22	93
\$100,000 - \$149,999	35.29	83
\$150,000 - \$199,999	35.21	83
\$200,000 +	40.97	97

When indexed, some interesting findings became salient:

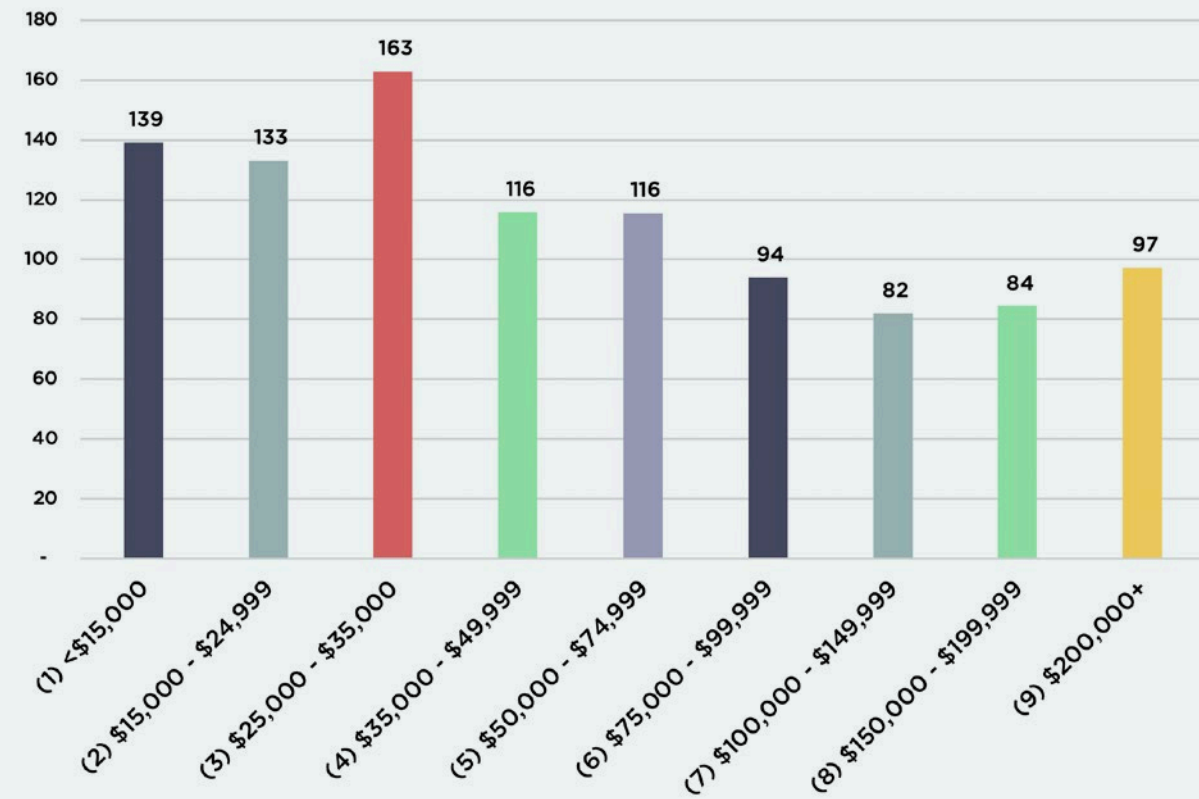
- Residents have a higher opinion of the City than non-residents (162 v 95)
- Primary English speakers have a low opinion (index 76) when compared to every other language group. There is no marked difference between Spanish speakers (138) and Russians (133)
- The positive opinion increases with age so that younger respondents had a lower opinion (around 82) than the older ones (average 103)
- Visitors and people who work but do not live in the City have a much lower opinion of it (an average of 65). People who live and work in the city have a much higher NPS.
- The NPS actually descends with income (up to \$200k+)

People who live in the City year-round have a higher NPS than those who live there part-time.

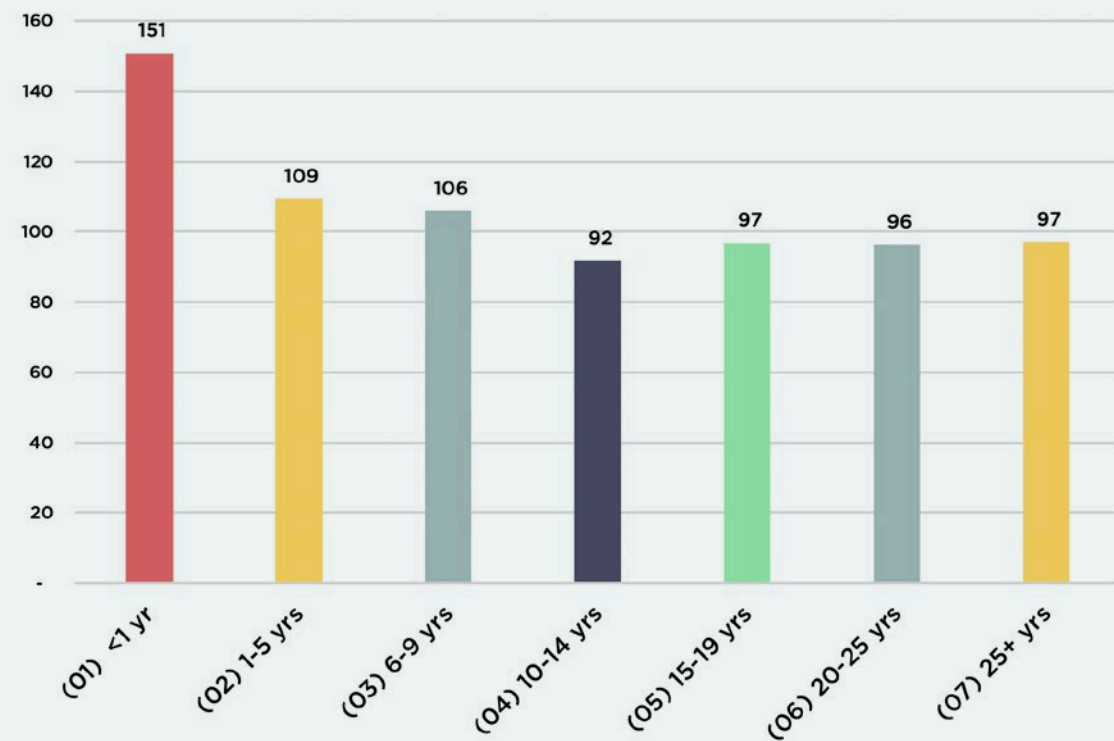
- The NPS changes, but not that much, with the east/west Collins division (113 v 103), so it is not a strong predictive factor.
- The NPS falls steeply as people live longer in SIB, then stabilizes.



NET PROMOTER SCORE (NPS) AVERAGE HOUSEHOLD INCOME



NET PROMOTER SCORE AGAINST LENGTH OF RESIDENCY



Recent and Future Developments

To project the direction of future growth in the City of Sunny Isles Beach, the makeup of recent and pending residential and commercial developments within the City were examined and compared that to larger trends within Miami-Dade County.

The City of Sunny Isles Beach currently has approximately 17,090 total dwellings, with the majority comprised of condominiums or apartments. According to City records, an estimated 1,760 additional units will be added from 2020 through 2022, with the majority of those units belonging to luxury condominium projects along Collins Avenue. From this data it can be inferred that the trend toward luxury development in the City will continue to grow and be a defining factor for future residents.





Residential ★

RESIDENCES BY ARMANI CASA - 18975 Collins Avenue

Luxury 60-story condominium tower with 260 residential units.

Recently Completed: 2020

Sales for available units range in price from \$1,270,000 to \$6,900,000.

Approximate price per sq ft \$1323

TURNBERRY OCEAN CLUB - 18501 Collins Avenue

Luxury 52-story condominium tower with 154 dwelling units.

Recently Completed: 2020

Sales for available units range in price from \$3,700,000 to over \$14,500,000.

Approximate price per sq ft \$1276.

THE ESTATES AT ACQUALINA - 17901 Collins Avenue

Luxury project encompassing two residential towers with a total of 264 dwelling units.

Projected Date of Completion: 2022

Sales for available units range in price from \$4,750,000 to \$59,000,000.

Approximate price per sq ft \$1705

PARQUE TOWERS - 290 & 330 Sunny Isles Blvd

Luxury condominium project encompassing two towers with 320 residential units.

Recently Completed in 2019

Sales for available units range in price from \$660,000 to \$8,290,000.

Approximate price per sq ft \$649.

THE RITZ CARLTON RESIDENCES - 15701 Collins Avenue

Luxury condominium tower encompassing 211 residential units.

Recently Completed in 2020

Sales for available units range in price from \$2,450,000 to over \$5,221,000.

Approximate price per sq ft \$1434.

AURORA - 17550 Collins Avenue

Mixed-use condominium tower consisting of 5,721 square feet of commercial spaces on the ground floor and 61 residential units on the upper floors.

Projected Date of Completion: 2021

Sales for available units range in price from \$900,000 to \$1,700,000.

LA PLAYA VARADERO - 18801 Collins Avenue

Luxury condominium project including two towers totaling 490 residential units.

MARINA DEL MAR II - 150 - 300 Kings Point Drive

Project encompassing two apartment rental towers with a total of 254 dwelling units

Projected Date of Completion: 2022

Commercial ★

MONACO - 17501 Collins Avenue

Three-story building with 113 hotel units and a restaurant for their guests and visitors.

Community Facilities ★

GATEWAY CENTER - 151 Sunny Isles Blvd

GOVERNMENT CENTER EXPANSION - 18080 Collins Avenue

JEWISH COMMUNITY CENTER - 488 Sunny Isles Boulevard

The Chabad Lubavitch Russian Center of South Florida has obtained an approval to develop a community center which will hold a Chabad, restaurant, learning facility, and a social hall.

Brand Positioning

The City of Sunny Isles Beach is already one of the most desirable addresses in the South Florida region, an upscale, beachfront community that has undergone tremendous growth and investment in the relatively recent past. Salient assets include:

- World-renowned architecture.
- A diverse multicultural population.
- Strong and expanding amenities for residents and visitors.
- Valuable real estate.
- An existing brand needing refinement for its growing reputation.

The City has high approval ratings from existing residents, and a growing business and tourism sector that can continue steady expansion. Its compact nature, improving range of activities and services, its association with the Miami brand as a whole, and long expanse of oceanfront properties and access, are natural, easy selling points that need to be honed and highlighted. But since the City of Sunny Isles Beach does not really have one strong, single identity in the public's mind, there is significant room for improvement in both branding and marketing.

AREAS OF FOCUS INCLUDE:

- Raising the City's profile as an upmarket and sophisticated place to live, to visit and to own a business. As existing luxury properties accrue in value and additional ones are built out, selling the City of Sunny Isles Beach as a place for high net-worth investors and full-time residents will be important.
- At the same time continuing to emphasize the City as a casual and family-friendly place.
- Expanding the promotion of its beach, pier and recreational amenities.
- Emphasizing the City of Sunny Isles Beach's perfect location for accessibility to metropolitan Miami and Fort Lauderdale attractions, without some of the urban downsides of either regional center.
- Positioning the City as a more tranquil and navigable alternative to Miami Beach, as more sophisticated and diverse than Broward County oceanfront communities, and as more centrally located than similar high-end mixed single family and high-rise coastal cities like Key Biscayne.
- Taking advantage of the recent uptick in buyers relocating from areas such as New York metro and California presents, which offers a special opportunity for positioning the City of Sunny Isles Beach for additional residential growth.



Competitive Analysis

Central to the brand positioning of the City of Sunny Isles Beach is the evaluation of its context within Miami-Dade County and its relation to neighboring municipalities. This will be key in promoting the City's brand to new audiences, as well as strengthening its position with current audiences.



MIAMI BEACH: As Florida's most famous destination, the allure of the City of Miami Beach is driven primarily by its South Beach district — bustling beaches, extravagant nightlife, world-class cuisine, and a year-round sub-tropical climate. It also enjoys solid brand recognition that has been bolstered by decades of tourism marketing, along with alluring representation in popular culture.

However, the assets that make Miami Beach an attractive vacation destination are also what deter potential residents. The City of Sunny Isles Beach has the opportunity to capitalize on its proximity to Miami Beach while carving out its own reputation as a beautiful, safe, and family-friendly oceanfront community.



AVENTURA: As the municipality closest in size and proximity to the City of Sunny Isles Beach (38,098 and 22,479 respectively), the City of Aventura has the advantage of a larger geographic footprint. Aventura is most noted for the Aventura Mall (the third largest mall in the United States) and its location on the Intracoastal Waterway, which it shares with the City of Sunny Isles Beach.



BAL HARBOUR: On the southern side of Haulover Park (contiguous with the City of Sunny Isles Beach), the Village of Bal Harbour is a small oceanfront community known best as the home of Bal Harbour Shops, a pinnacle of luxury retail. That association has benefitted the Village with a decidedly upscale and luxe appeal, and continues to shape its brand recognition. Bal Harbour is also home to the St. Regis Bal Harbour Resort and Remede Spa, which further adds to its luxe cachet. With its relatively small footprint, and notoriously strict development rules, Bal Harbour allows the City of Sunny Isles Beach opportunity to progress where it has stalled — new luxury residential developments.

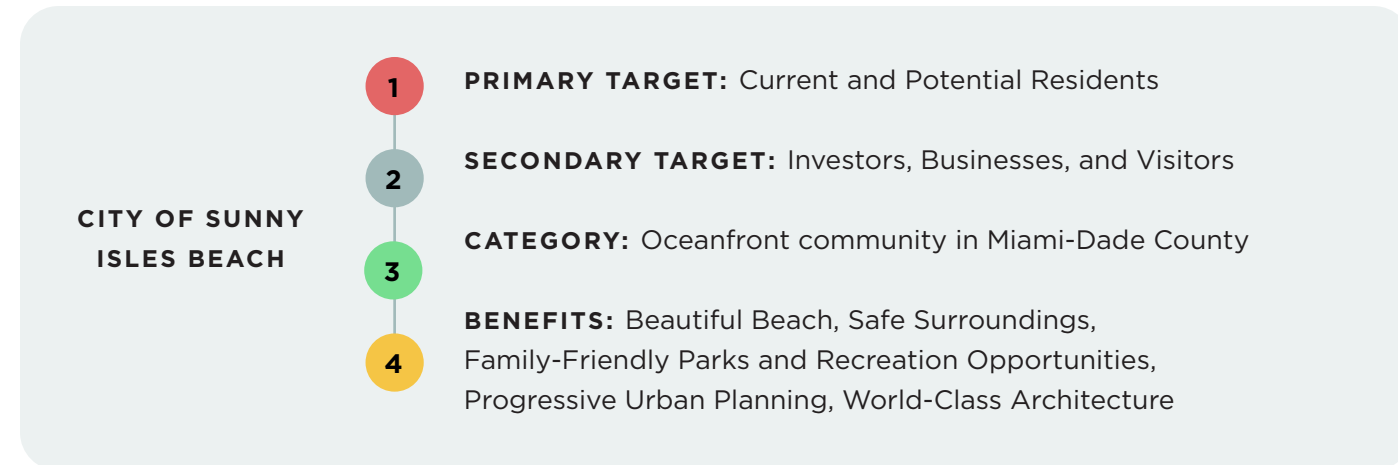


SURFSIDE: To Bal Harbour's south, the Town of Surfside is a similarly small municipality with upscale oceanfront developments to the east, and family-friendly single family homes to the west. In recent years, Surfside has also seen a trend toward more luxury developments. However, efforts have focused more on attracting tourism, not residents. Their most recognized attraction is the Four Seasons Hotel at the Surf Club.

A common element among the neighboring communities, with the exception of Aventura, is that they are all home to at least one five-star hotel or spa. The City of Sunny Isles Beach's Acqualina Resort and Residences, and the onsite Acqualina Spa by ESPA is a competitive property in the luxury hospitality sector, and a strong ambassador for introducing the City's upscale quality of life to visitors and prospective residents.

The City of Sunny Isles Beach has a unique opportunity to leverage its already strong standing with existing residents into a winning place branding strategy that strengthens its broader appeal to future residents, businesses, and by extension, visitors.

Brand Positioning: Framing



Brand Positioning: Messaging

Traditionally, the points of differentiation for the City of Sunny Isles Beach have been along **beauty, quality, and value**. To further cement the City brand in the public eye, it is proposed to focus on messaging using those differentiators, and introduce **customer service** as an additional factor. As evidenced in the qualitative portion of the research, current residents express high levels of satisfaction with the responsiveness of their local government. This is a positive differentiator that can also be reinforced for prospective residents and investors.

MAIN MESSAGE:

The City of Sunny Isles Beach is a South Florida oceanfront community that offers the pillars of a quality upscale lifestyle for all citizens: a beautiful landscape, a safe and family-friendly environment, culturally rich municipal amenities, and a progressive urban vision.

Recommendations for Next Steps

Marketing to residents, businesses, and visitors

There are several opportunities for the City of Sunny Isles Beach to improve its current brand profile and amplify its brand recognition to prospective residents, visitors, and businesses.

INTERNAL

An internal campaign aimed at increasing civic pride among residents and business owners. Running parallel to this campaign would be an internal initiative among employees of the City. Great brands start from within, and city employees are the best personification of the City brand.

EXTERNAL

An external campaign aimed at visitors, prospective businesses, and future residents of the City.

Focus on the key elements

POSITIVE WORDS

The top three positive words were relatively stable across all segmentations: *Beauty, Safety, Walkability*. A strong #4 - *Family-Oriented*.

COMMUNITY

So at the core, the City of Sunny Isles is a beautiful, walkable, elevated community that is great for the entire family. Its family-friendliness is further bolstered by the reputation of its school, and the plethora of recreational opportunities provided by the local government. This positioning is not new, of course, but "if you repeat it long enough, you own it."

PERSONALITY TRAITS

This positioning is validated by the top three personality traits associated with the City: *Security, Comfort, Calmness*.

Future priorities and corresponding tactics that we recommend:

Priority #1 - Campaign to increase pride among current residents.

Priority #2 - Campaign to attract new residents

Priority #3 - Campaign to attract businesses

Priority #4 - Visitor Campaign

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