

2019 Resident Survey

Village of Pinehurst, NC

Presented by

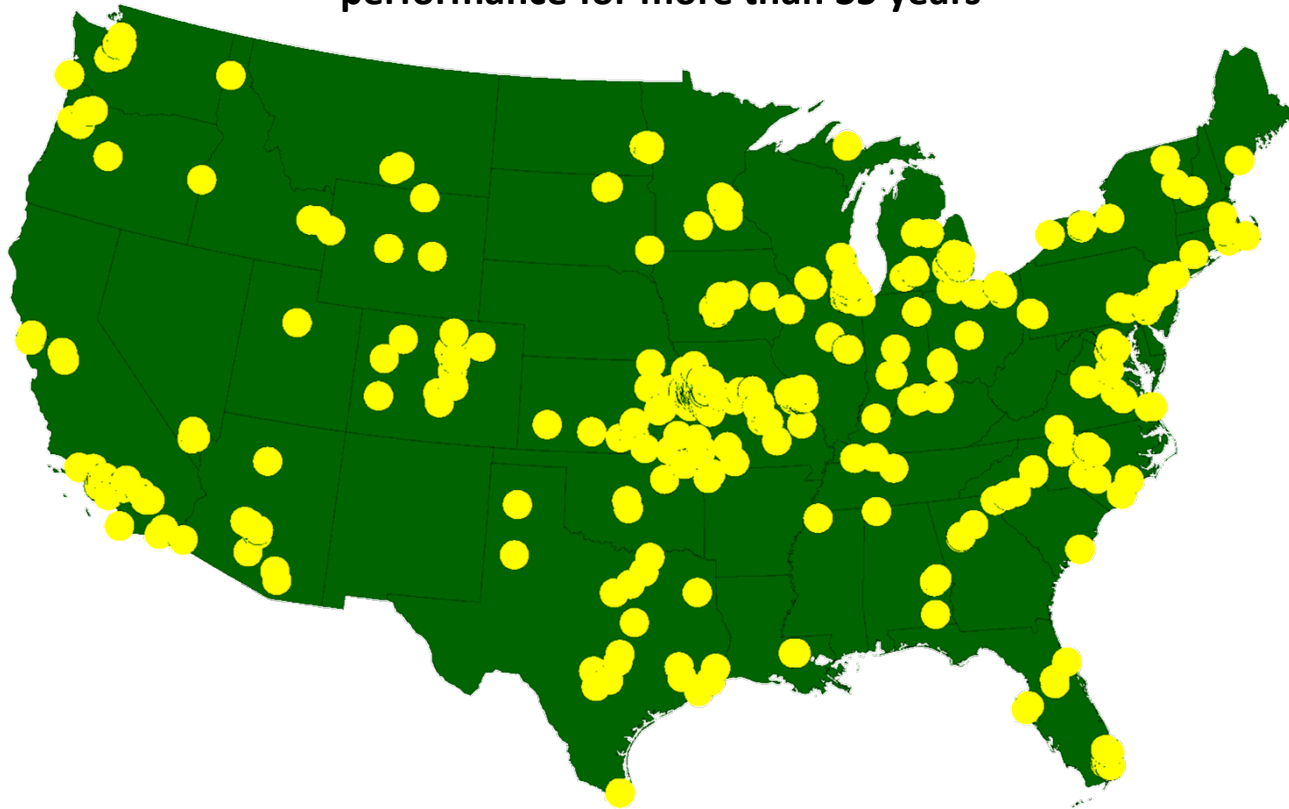


September 2019

ETC Institute

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Purpose

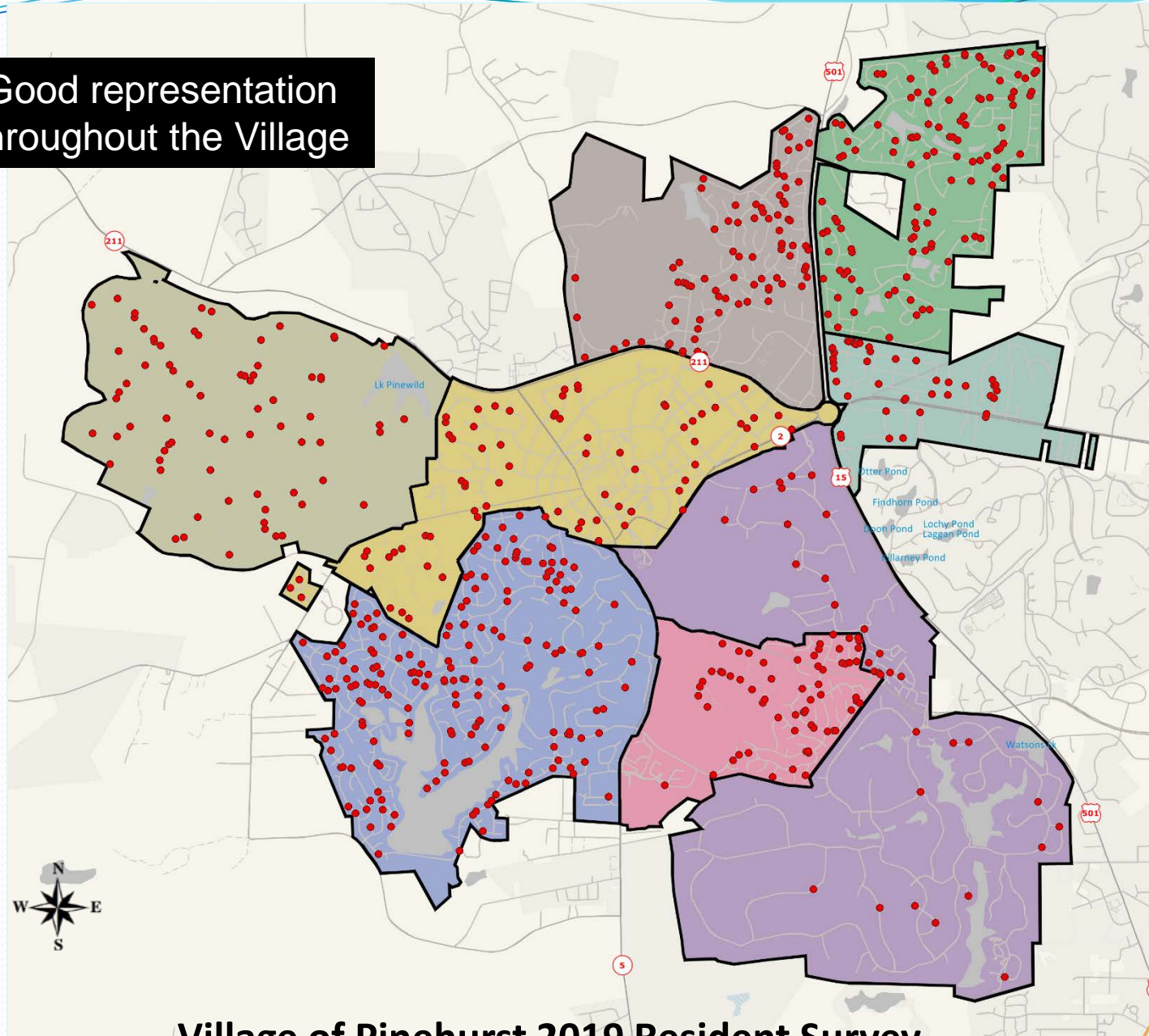
- **To objectively assess citizen satisfaction with the delivery of major Village services**
- **To help determine priorities for the community**
- **To measure trends from previous surveys**
- **To compare the Village's performance with residents regionally and nationally**

Methodology

- **Survey Description**
 - ❑ seven-page survey; included many of the same questions that were asked in previous years
 - ❑ 8th Resident Survey conducted for the Village
- **Method of Administration**
 - ❑ by mail and online to a random sample of Village residents
 - ❑ each survey took approximately 15-20 minutes to complete
- **Sample size:**
 - ❑ completed surveys: 716
 - ❑ demographics of survey respondents accurately reflects the actual population of the Village
- **Confidence level:** 95%
- **Margin of error:** +/- 3.6% overall

Location of Survey Respondents

Good representation
throughout the Village



Village of Pinehurst 2019 Resident Survey

Bottom Line Up Front

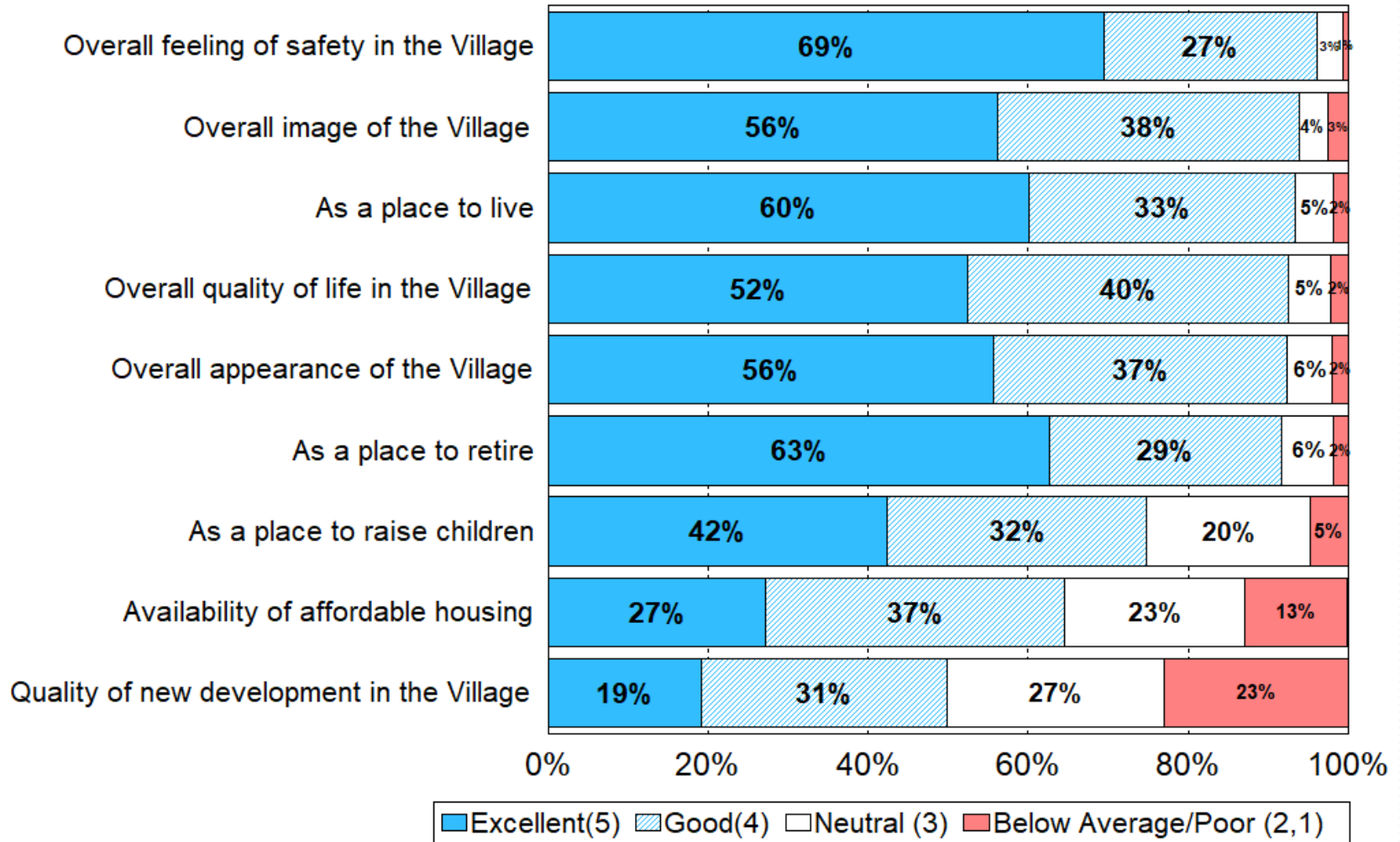
- **Residents Have a Very Positive Perception of the Village**
 - ❑ 93% rated Pinehurst as excellent or good place to live
 - ❑ 94% would recommend Pinehurst to others as a place to live
- **Satisfaction Ratings Are Similar to 2018, and Remain Among the Highest in the Nation**
 - ❑ Satisfaction ratings have increased or stayed the same in 44 of 85 areas since 2018, and increased or stayed the same in 68 of 80 areas since 2013
- **Satisfaction with Village Services is Much Higher in Pinehurst Than Other Communities**
 - ❑ Pinehurst rated above the U.S. Average in 49 of 53 areas, and above the Regional Average in 50 of the 53 areas that were compared
 - ❑ Satisfaction with Customer Service from Village Employees rated 39% above the Regional Average and 41% above the U.S. Average
- **Overall Community Priorities:**
 - ❑ Efforts at maintaining the quality of neighborhoods
 - ❑ Street and right-of-way maintenance
 - ❑ Enforcement of Village codes and ordinances

Major Finding #1

**Residents Have a Very Positive
Perception of the Village**

Q4. Perception Residents Have of Pinehurst as a Community

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding "no opinion")

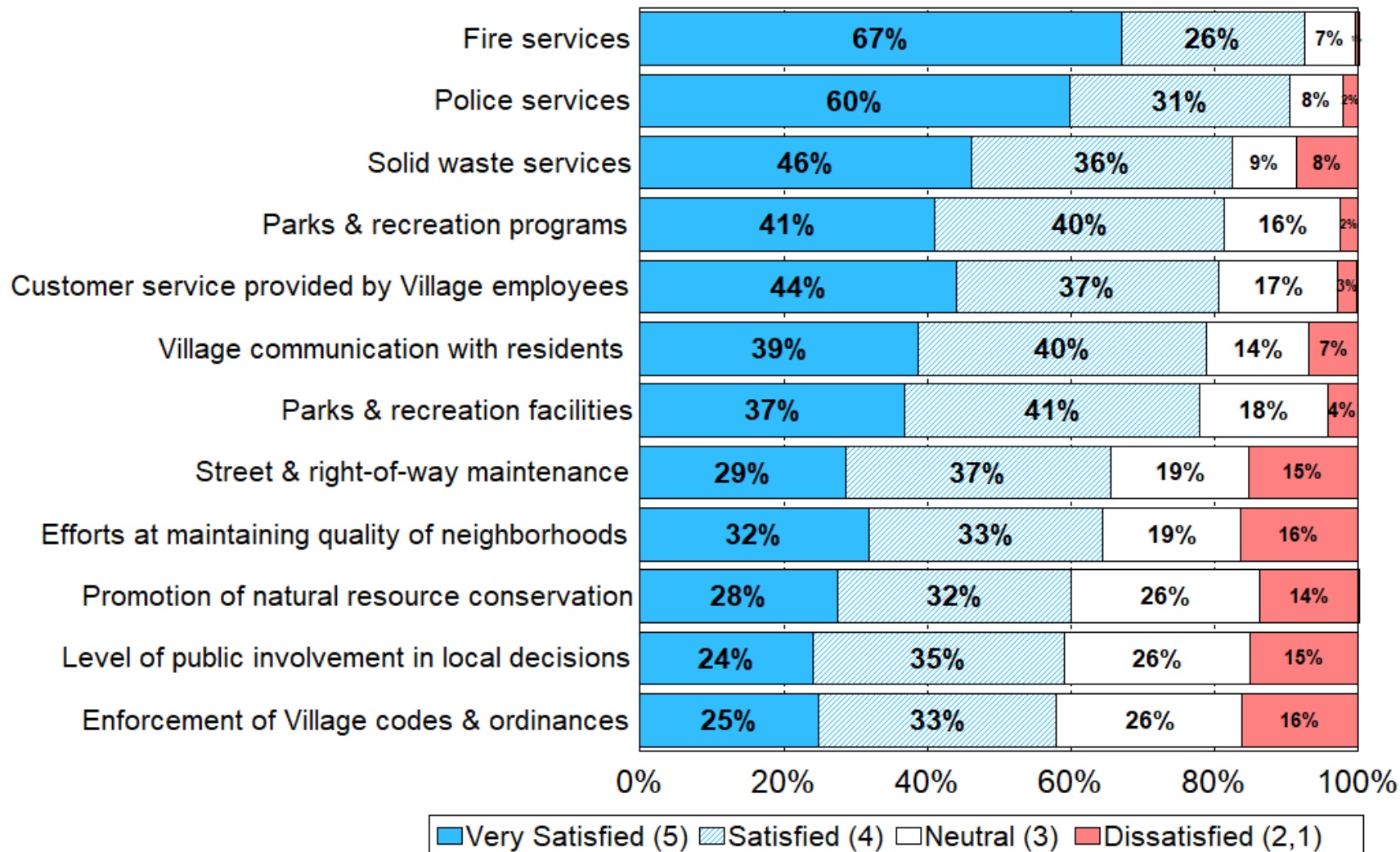


Source: ETC Institute DirectionFinder (2019 - Pinehurst, NC)

Nearly All Residents Feel Pinehurst Is an Excellent or Good Place to Live, to Retire, and Feel Safe in the Village

Q1. Overall Satisfaction with Village of Pinehurst Services by Major Category

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding "no opinion")

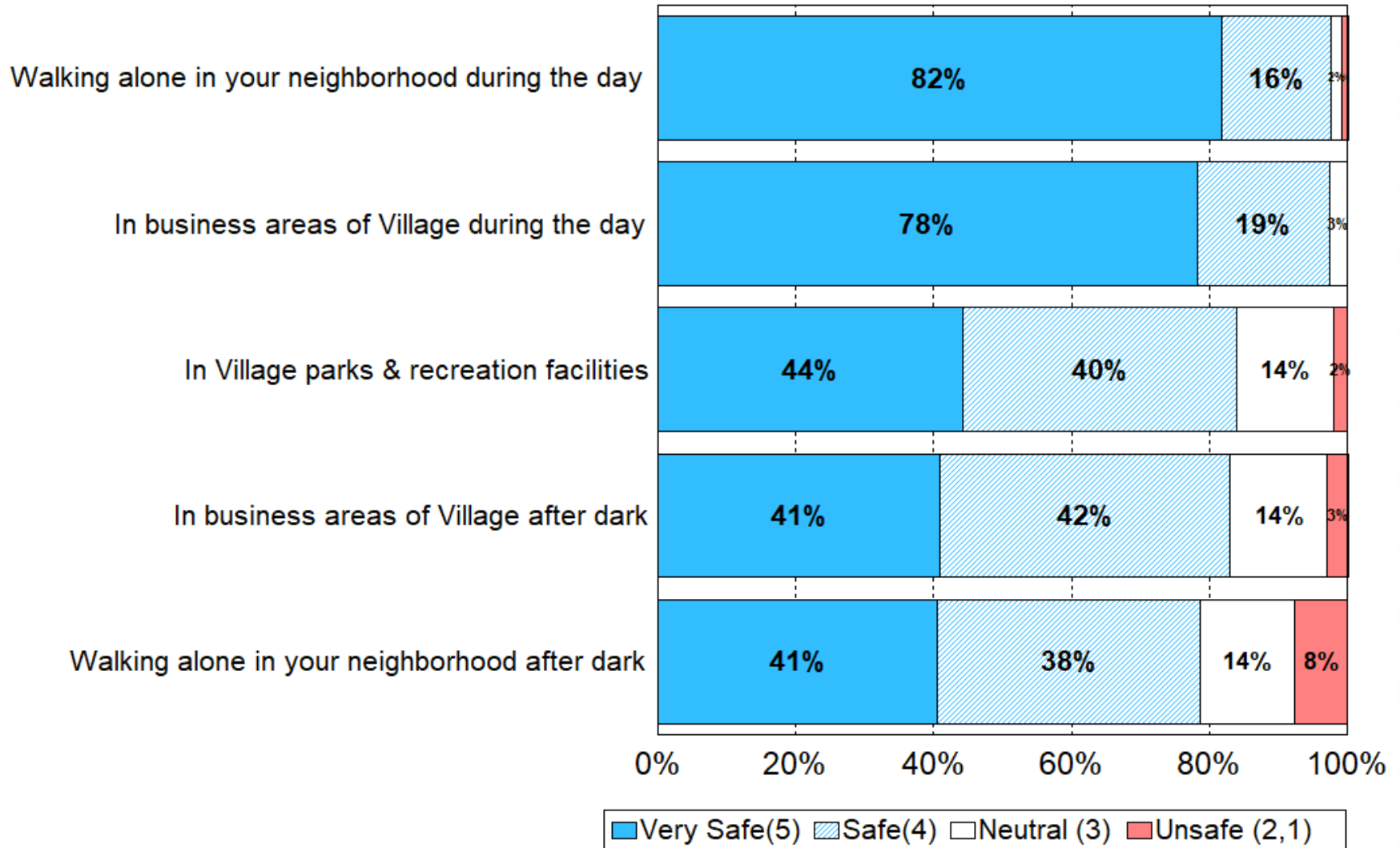


Source: ETC Institute DirectionFinder (2019 - Pinehurst, NC)

Satisfaction Is High for All Village Services

Q5. Perceptions of Safety and Security in Pinehurst

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding "no opinion")

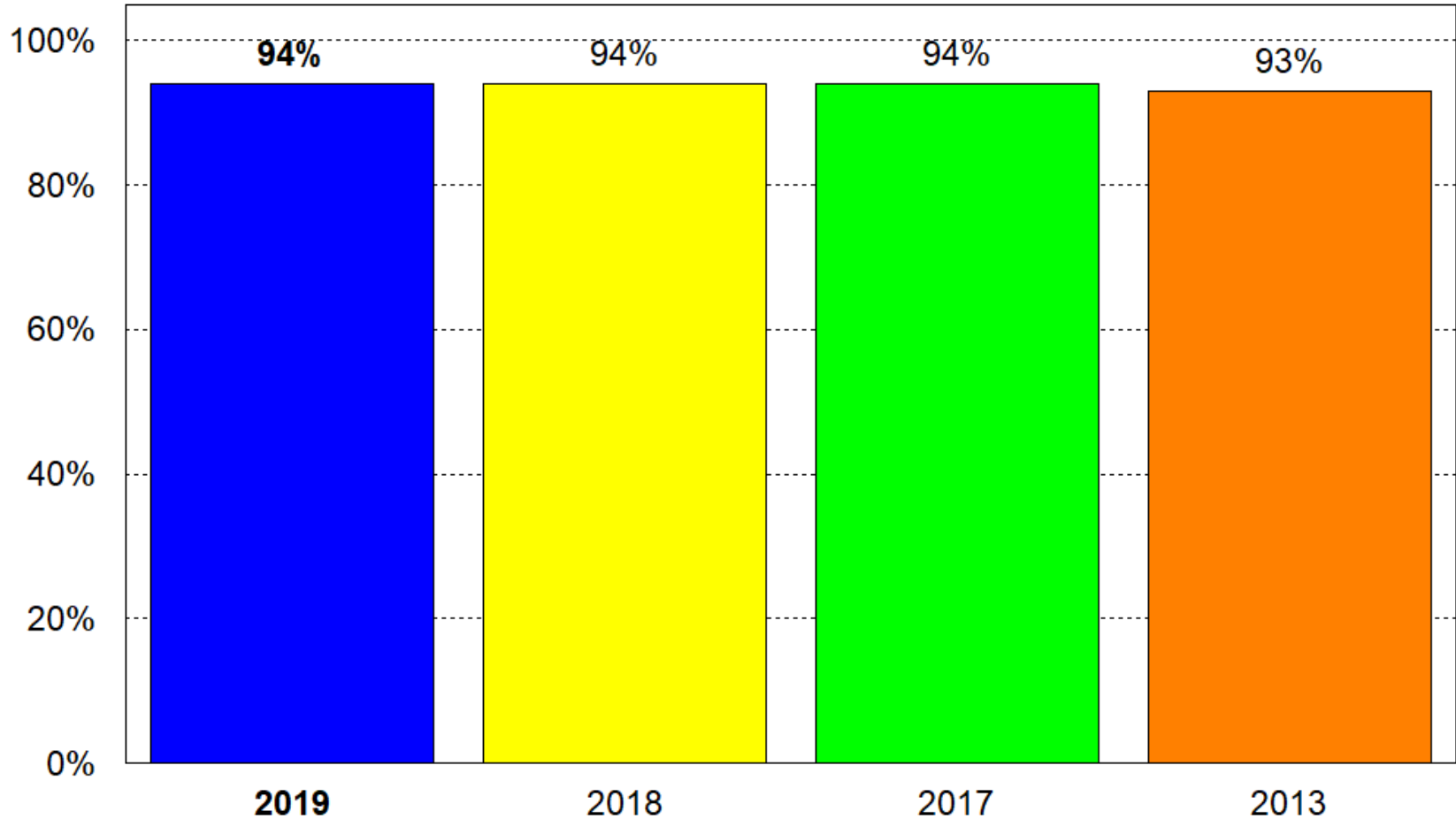


Source: ETC Institute DirectionFinder (2019 - Pinehurst, NC)

Residents Feel Safe in Pinehurst

Q26. Would you recommend Pinehurst to others as a place to live?

by percentage of respondents who answered "yes" (excluding "not provided")



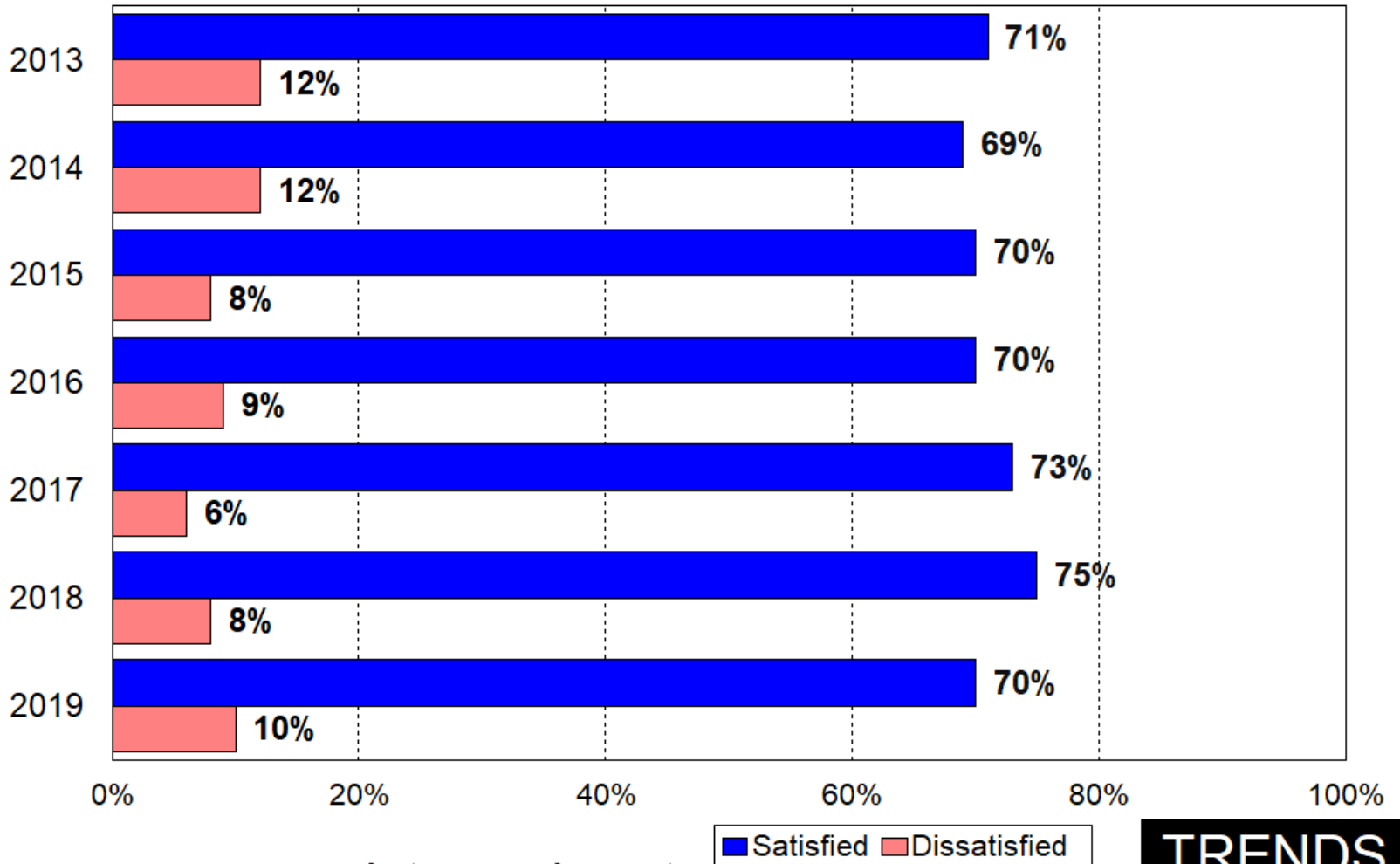
Source: ETC Institute DirectionFinder (2019 - Pinehurst, NC)

TRENDS

94% of Residents Would Recommend Pinehurst to Others as a Place to Live

Q24. What is your level of satisfaction with the value you receive for the portion of your property taxes that funds the Village's operating budget?

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



Source: ETC Institute DirectionFinder (2018 - Pinehurst, NC)

TRENDS

7-1 Ratio of Residents Who Are Satisfied vs. Dissatisfied (70% vs. 10%) with the Value Received for Property Taxes Funding the Village's Operating Budget

Major Finding #2

**Satisfaction Ratings Are Similar to
2018, and Remain Among the
Highest in the Nation**

Short-Term Trends

Satisfaction Increases of 5% or More Since 2018

- Ease of travel through the large traffic circle (+9%)
- Winter weather response on Village streets (+7%)
- Availability of recreation indoor facilities (+7%)
- Range of amenities at parks and recreation facilities (+7%)
- Quality of recreation indoor facilities (+7%)
- Quality of adult recreation programs (+6%)
- Village website (+5%)

Satisfaction Decreases of 5% or More Since 2018

- Curbside recycling services (-17%)
- Solid Waste services (-8%)
- Promotion of natural resource conservation (-6%)
- Given Memorial Library programs (-6%)
- Quality of stormwater runoff/management system (-5%)

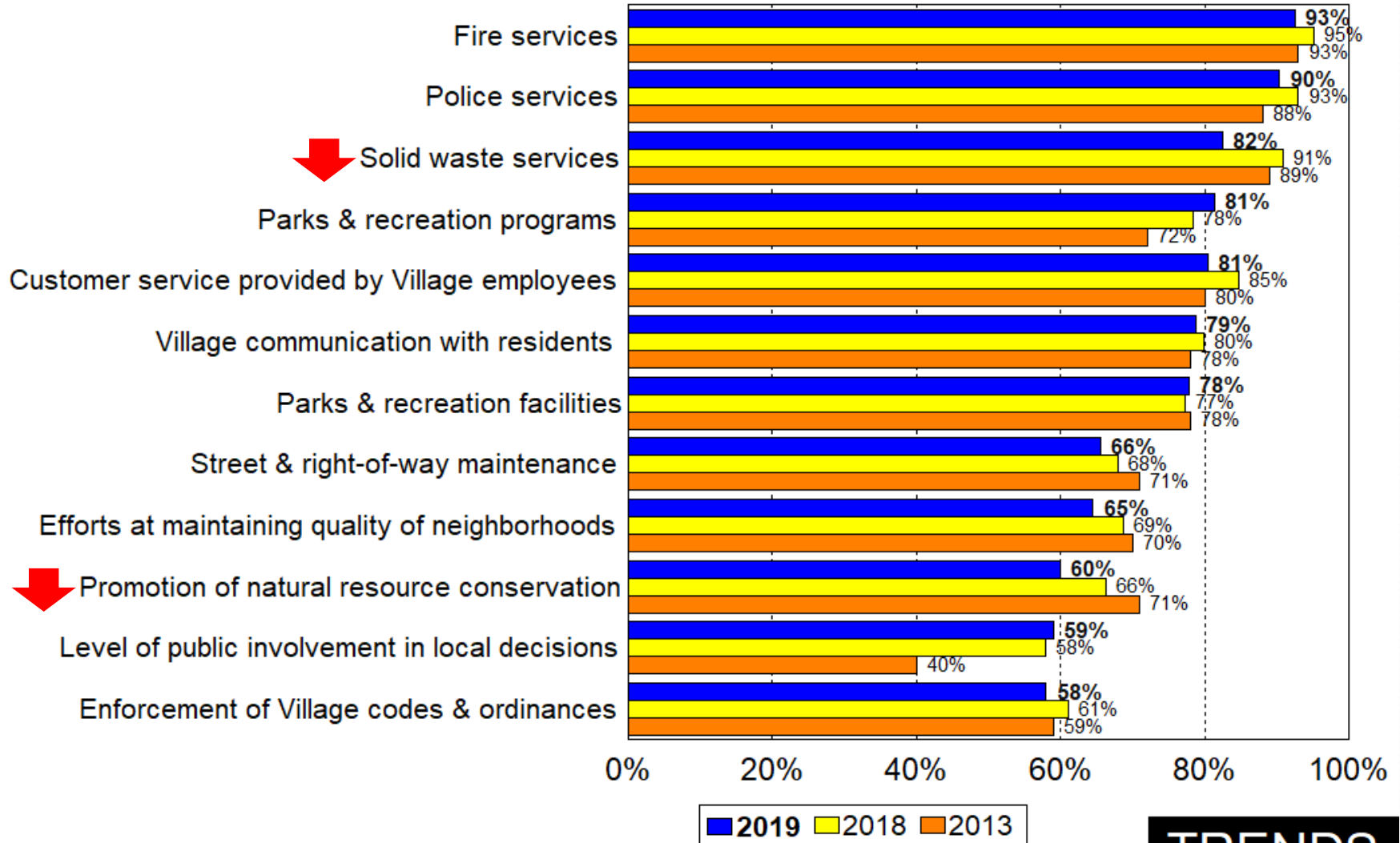
Long-Term Trends

Notable Satisfaction Increases Since 2013

- Level of public involvement in local decisions (+19%)
- Availability of walkways (+17%)
- Given Memorial Library programs (+16%)
- Range of amenities at parks & recreation facilities (+14%)
- Adequacy of street lighting (+13%)
- Availability of info about recreation programs (+12%)
- Availability of recreation indoor facilities (+11%)
- Quality of adult recreation programs (+10%)
- Overall quality of parks and recreation programs (+9%)
- Quality of information about Village programs/services (+9%)
- Quality of recreation indoor facilities (+8%)
- Quality of landscaping in medians & other public areas (+7%)

Q1. Overall Satisfaction with Village of Pinehurst Services by Major Category - 2019, 2018 & 2013

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding "no opinion")



Source: ETC Institute DirectionFinder (2019 - Pinehurst, NC)

TRENDS

Significant Increases From 2018:

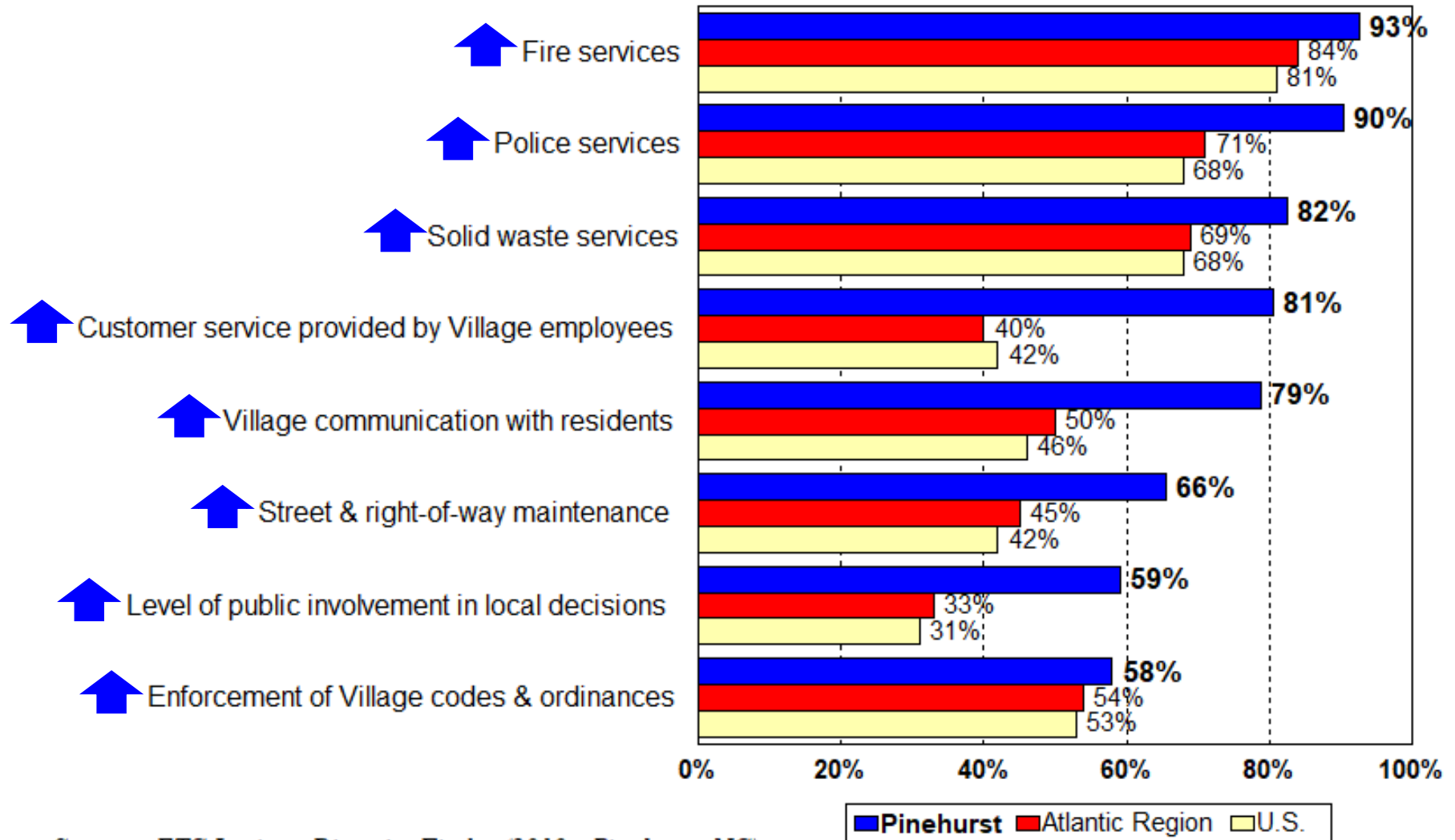
Significant Decreases From 2018:

Major Finding #3

**Satisfaction with Village Services Is
Much Higher in Pinehurst Than in
Other Communities**

Overall Satisfaction with Various Community Services Pinehurst vs. Atlantic Region vs. the U.S.

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)



Source: ETC Institute DirectionFinder (2019 - Pinehurst, NC)

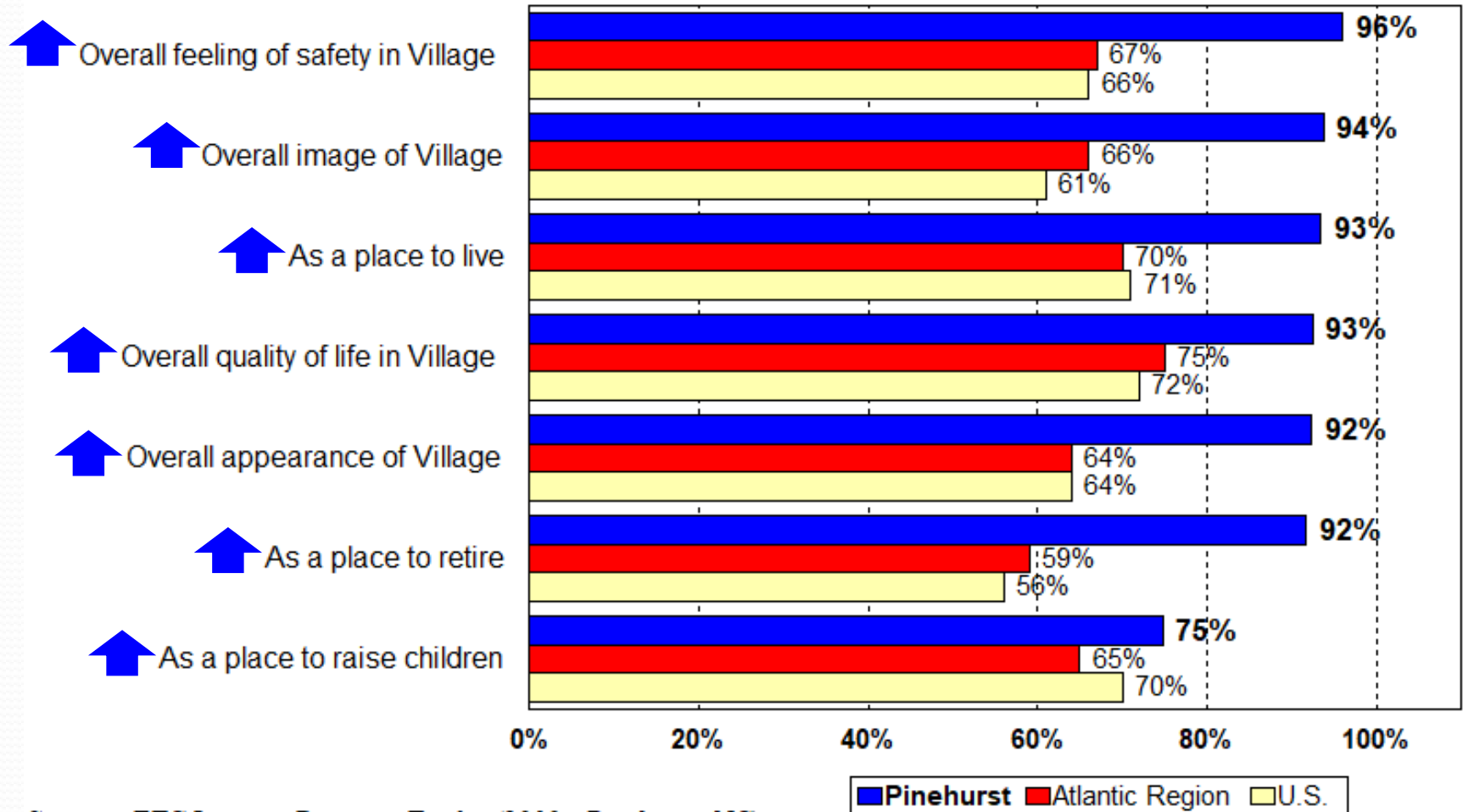
Significantly Higher: ↑

Significantly Lower: ↓

Satisfaction with Issues that Influence Perceptions of the Village

Pinehurst vs. Atlantic Region vs. the U.S.

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)



Source: ETC Institute DirectionFinder (2019 - Pinehurst, NC)

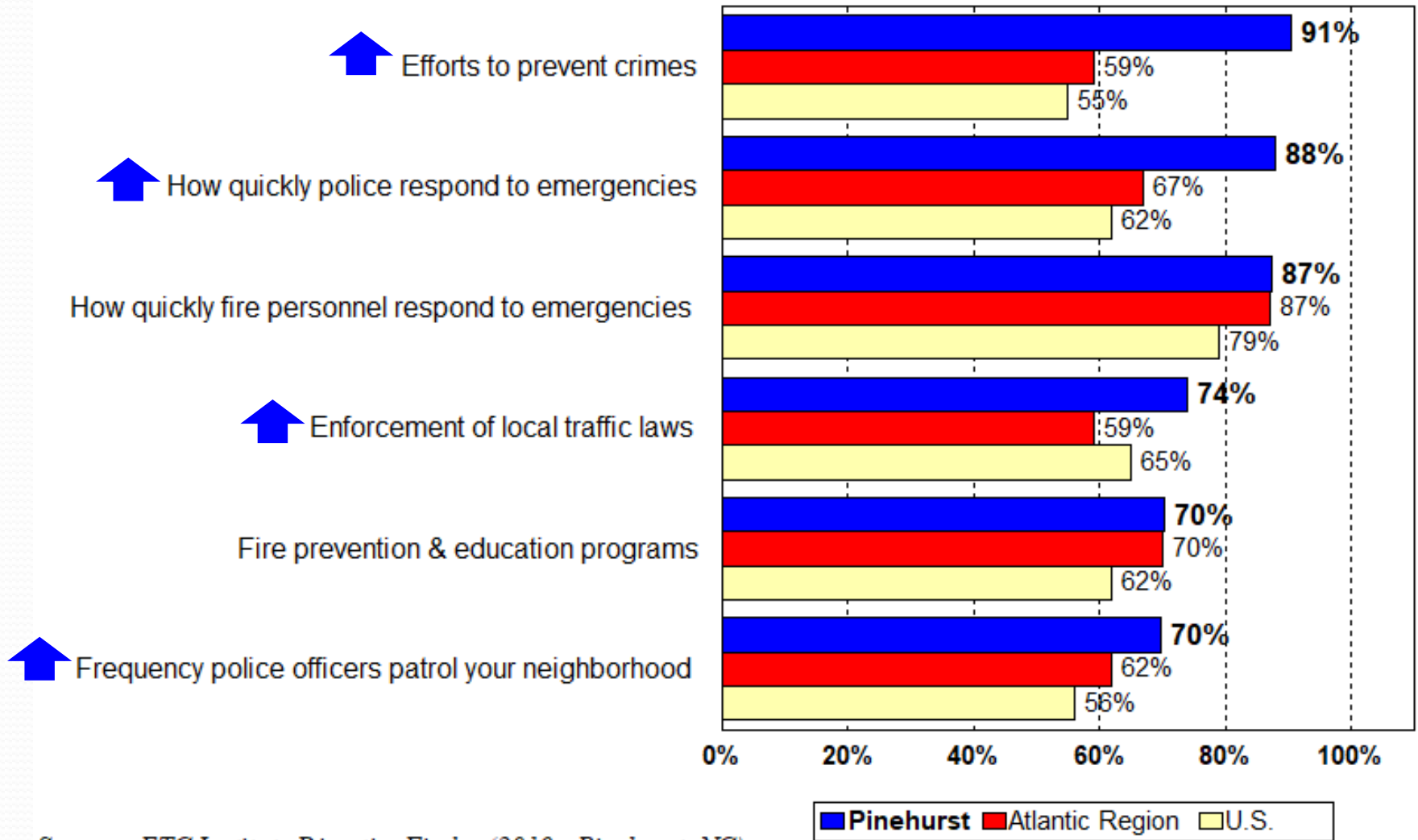
Significantly Higher: ↑

Significantly Lower: ↓

Overall Satisfaction with Public Safety Services

Pinehurst vs. Atlantic Region vs. the U.S.

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)



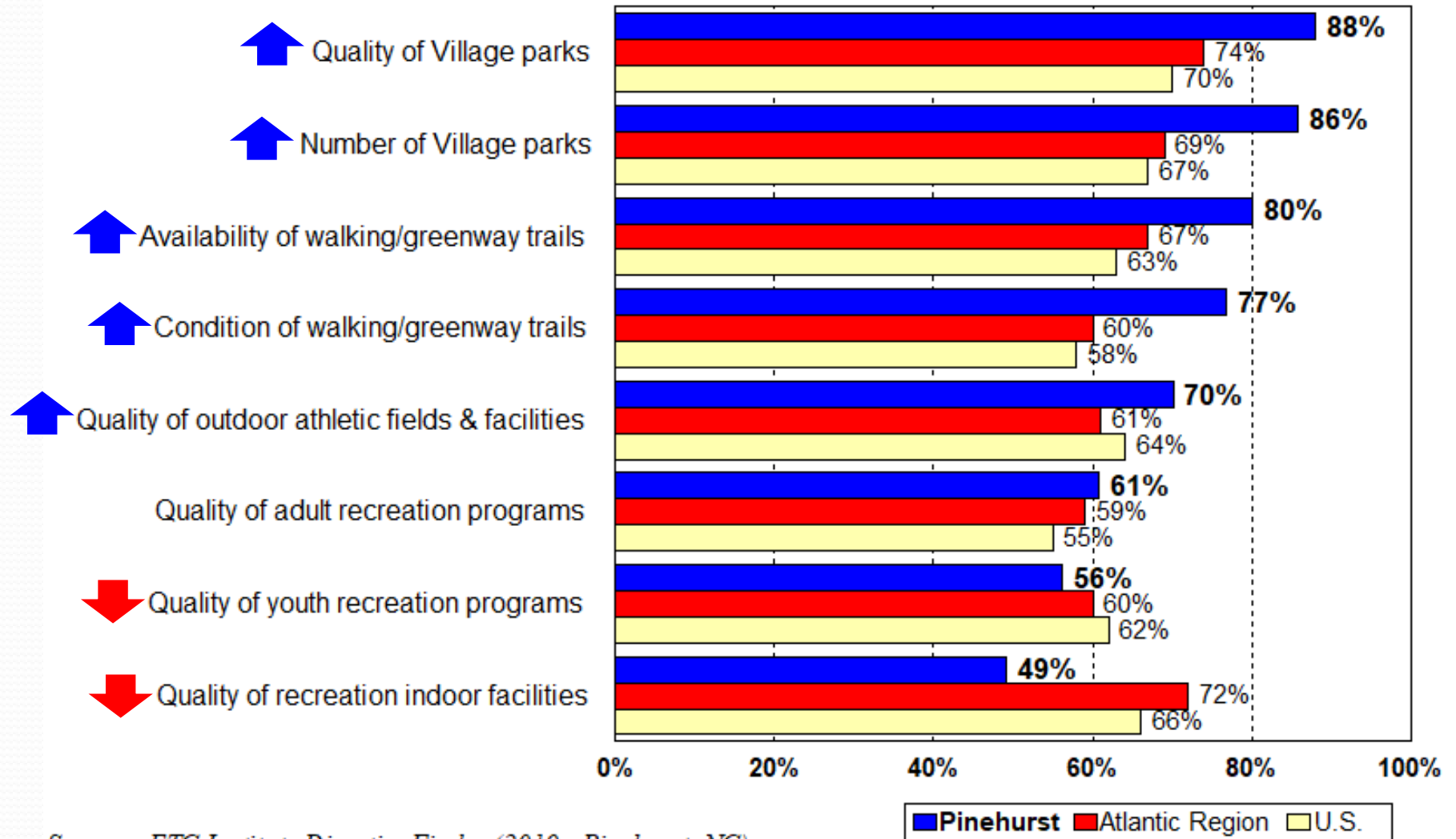
Source: ETC Institute DirectionFinder (2019 - Pinehurst, NC)

Significantly Higher: ↑

Significantly Lower: ↓

Overall Satisfaction with Cultural and Recreation Services Pinehurst vs. Atlantic Region vs. the U.S.

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)



Source: ETC Institute DirectionFinder (2019 - Pinehurst, NC)

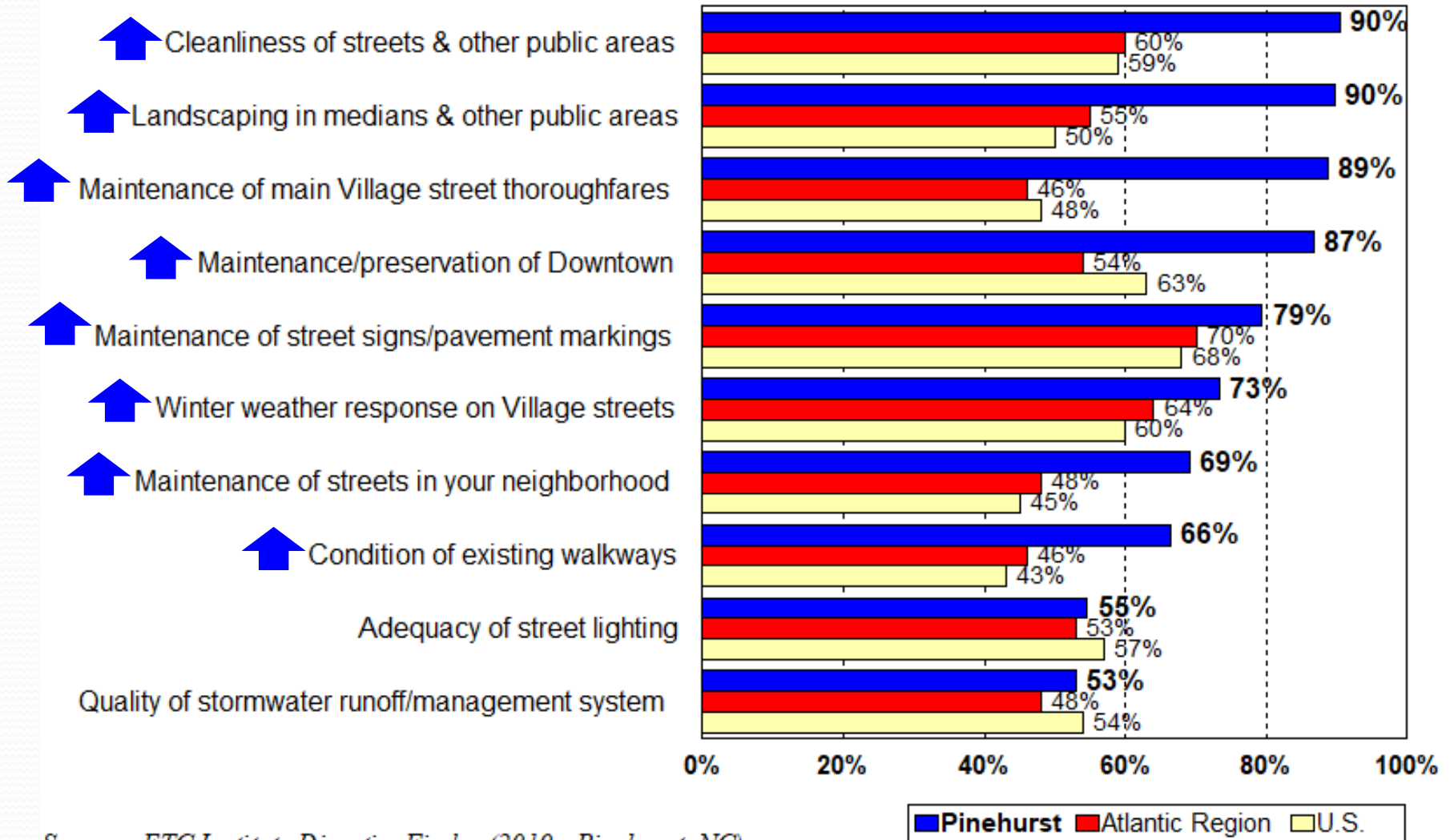
Significantly Higher: ↑

Significantly Lower: ↓

Overall Satisfaction with Public Services

Pinehurst vs. Atlantic Region vs. the U.S.

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)



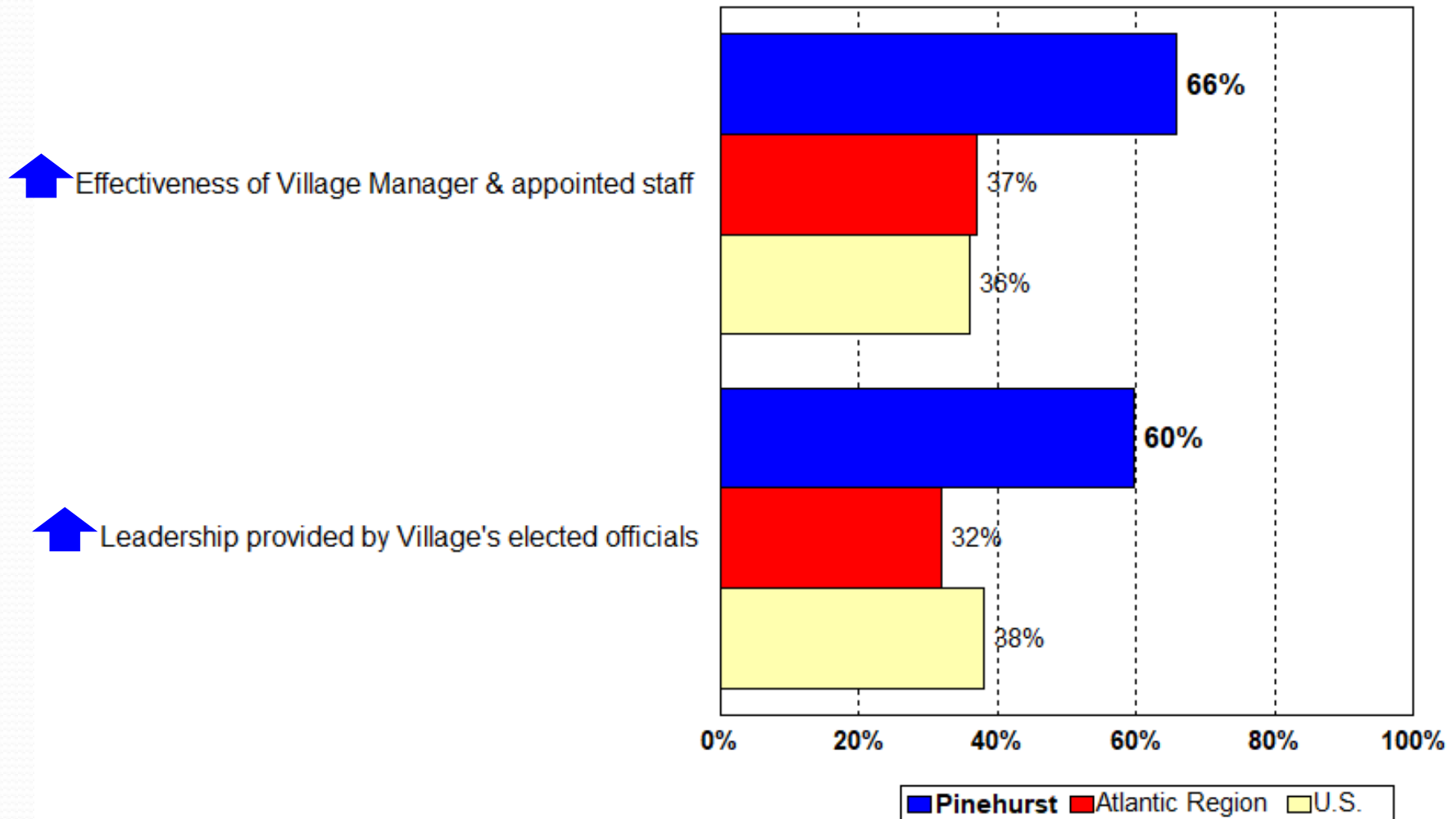
Source: ETC Institute DirectionFinder (2019 - Pinehurst, NC)

Significantly Higher: ↑

Significantly Lower: ↓

Overall Satisfaction with Village Leadership Pinehurst vs. Atlantic Region vs. the U.S.

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)



Source: ETC Institute DirectionFinder (2019 - Pinehurst, NC)

Significantly Higher: ↑

Significantly Lower: ↓

Major Finding #4

Community Priorities

2019 Importance-Satisfaction Rating

Village of Pinehurst, North Carolina

Overall Satisfaction with Village Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>High Priority (IS .10-.20)</u>						
Efforts at maintaining the quality of neighborhoods	39%	1	65%	9	0.1374	1
Street & right-of-way maintenance	33%	2	66%	8	0.1152	2
Enforcement of Village codes & ordinances	27%	4	58%	12	0.1126	3
Level of public involvement in local decisions	25%	5	59%	11	0.1010	4
<u>Medium Priority (IS <.10)</u>						
Promotion of natural resource conservation	21%	6	60%	10	0.0832	5
Parks & recreation facilities	18%	7	78%	7	0.0402	6
Village communication with residents	15%	11	79%	6	0.0307	7
Solid waste services	17%	8	82%	3	0.0306	8
Parks & recreation programs	15%	10	81%	4	0.0273	9
Police services	27%	3	90%	2	0.0258	10
Fire services	15%	9	93%	1	0.0110	11
Customer service provided by Village employees	4%	12	81%	5	0.0076	12

Overall Priorities: 

2019 Importance-Satisfaction Rating

Village of Pinehurst, North Carolina

Overall Satisfaction with Public Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>Very Priority (IS >.20)</u>						
Ease of travel through the large traffic circle	47%	1	46%	13	0.2511	1
<u>High Priority (IS .10-.20)</u>						
Adequacy of street lighting	32%	2	55%	10	0.1453	2
Availability of walkways	28%	4	51%	12	0.1362	3
Quality of stormwater runoff/management system	22%	5	53%	11	0.1020	4
<u>Medium Priority (IS <.10)</u>						
Maintenance of streets in your neighborhood	28%	3	69%	7	0.0872	5
Ease of travel on highway	18%	6	67%	8	0.0606	6
Winter weather response on Village streets	13%	8	73%	6	0.0347	7
Condition of existing walkways	10%	11	66%	9	0.0340	8
Maintenance/preservation of downtown	13%	10	87%	4	0.0166	9
Maintenance of main Village street thoroughfares	15%	7	89%	3	0.0165	10
Maintenance of street signs/pavement markings	6%	13	79%	5	0.0132	11
Cleanliness of streets & other public areas	13%	9	90%	1	0.0123	12
Quality of landscaping in medians & other public areas	9%	12	90%	2	0.0097	13

Public Service Priorities: 

2019 Importance-Satisfaction Rating Village of Pinehurst, North Carolina Overall Satisfaction with Public Safety Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Medium Priority (IS <.10)						
Frequency police officers patrol your neighborhood	31%	2	70%	6	0.0933	1
Enforcement of local traffic laws	29%	3	74%	4	0.0752	2
Efforts to prevent crimes	51%	1	91%	1	0.0482	3
Fire prevention & education programs	12%	6	70%	5	0.0364	4
How quickly police respond to emergencies	28%	4	88%	2	0.0340	5
How quickly fire personnel respond to emergencies	19%	5	87%	3	0.0244	6

Public Safety Priorities: ←

2019 Importance-Satisfaction Rating

Village of Pinehurst, North Carolina

Overall Satisfaction with Cultural and Recreation Services

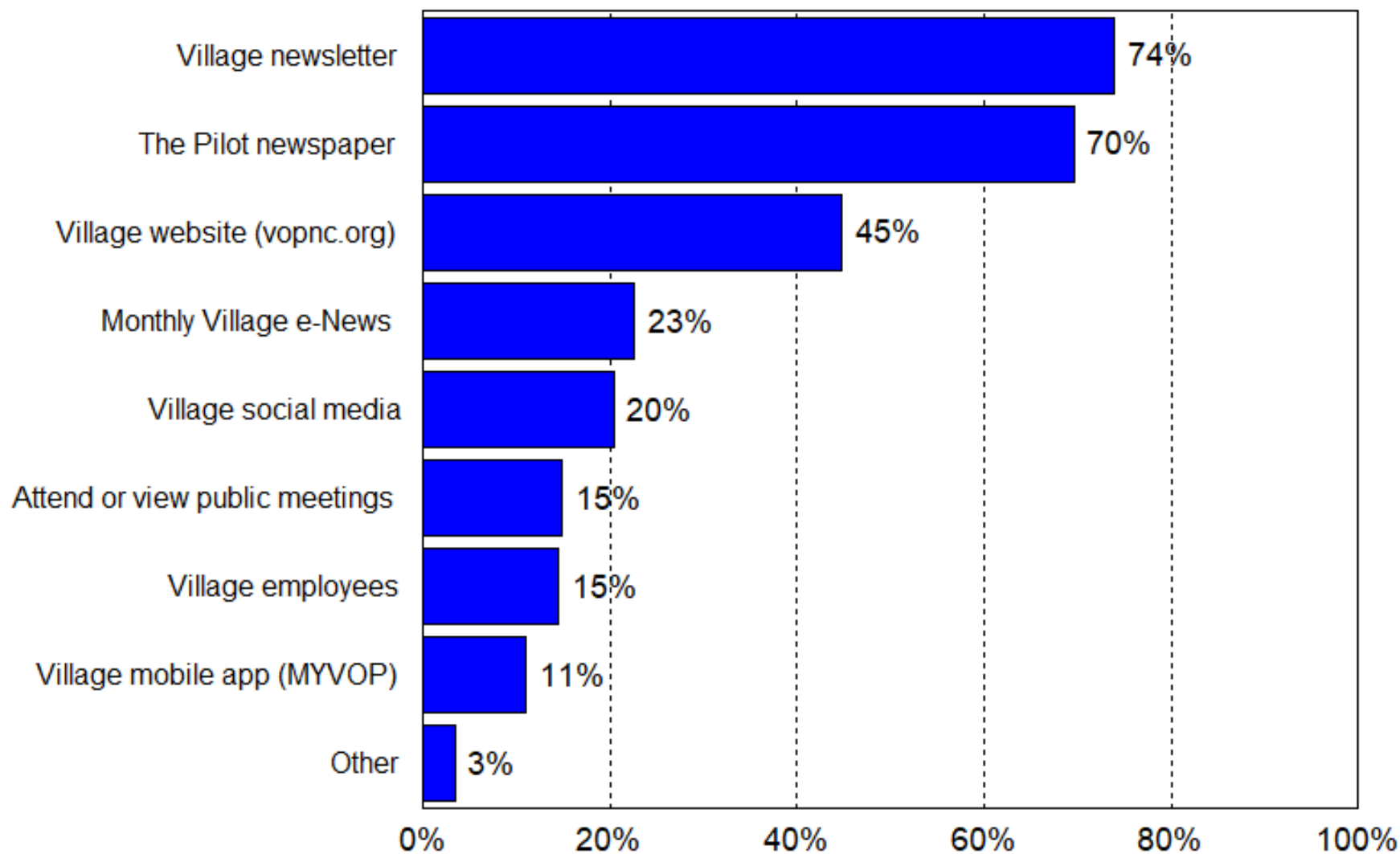
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>Medium Priority (IS <.10)</u>						
Availability of recreation indoor facilities	16%	7	46%	14	0.0883	1
Village sponsored cultural arts events	25%	1	70%	6	0.0765	2
Quality of adult recreation programs	17%	6	61%	11	0.0684	3
Quality of youth recreation programs	15%	8	56%	12	0.0659	4
Variety of cultural arts events & prgms in Southern Moore	20%	4	69%	7	0.0608	5
Quality of recreation indoor facilities	11%	11	49%	13	0.0575	6
Range of amenities at parks and rec facilities	15%	9	64%	10	0.0545	7
Condition of walking/greenway trails	21%	3	77%	4	0.0492	8
Availability of walking/greenway trails	21%	2	80%	3	0.0426	9
Availability of information about recreation programs	13%	10	67%	8	0.0423	10
Quality of Village parks	18%	5	88%	1	0.0217	11
Availability of outdoor athletic fields/facilities	6%	13	66%	9	0.0202	12
Quality of outdoor athletic fields and facilities	6%	14	70%	5	0.0170	13
Number of Village parks	8%	12	86%	2	0.0120	14

Cultural and Recreation Priorities: 

Other Findings

Q20. Which of the following do you use to get information about the Village of Pinehurst?

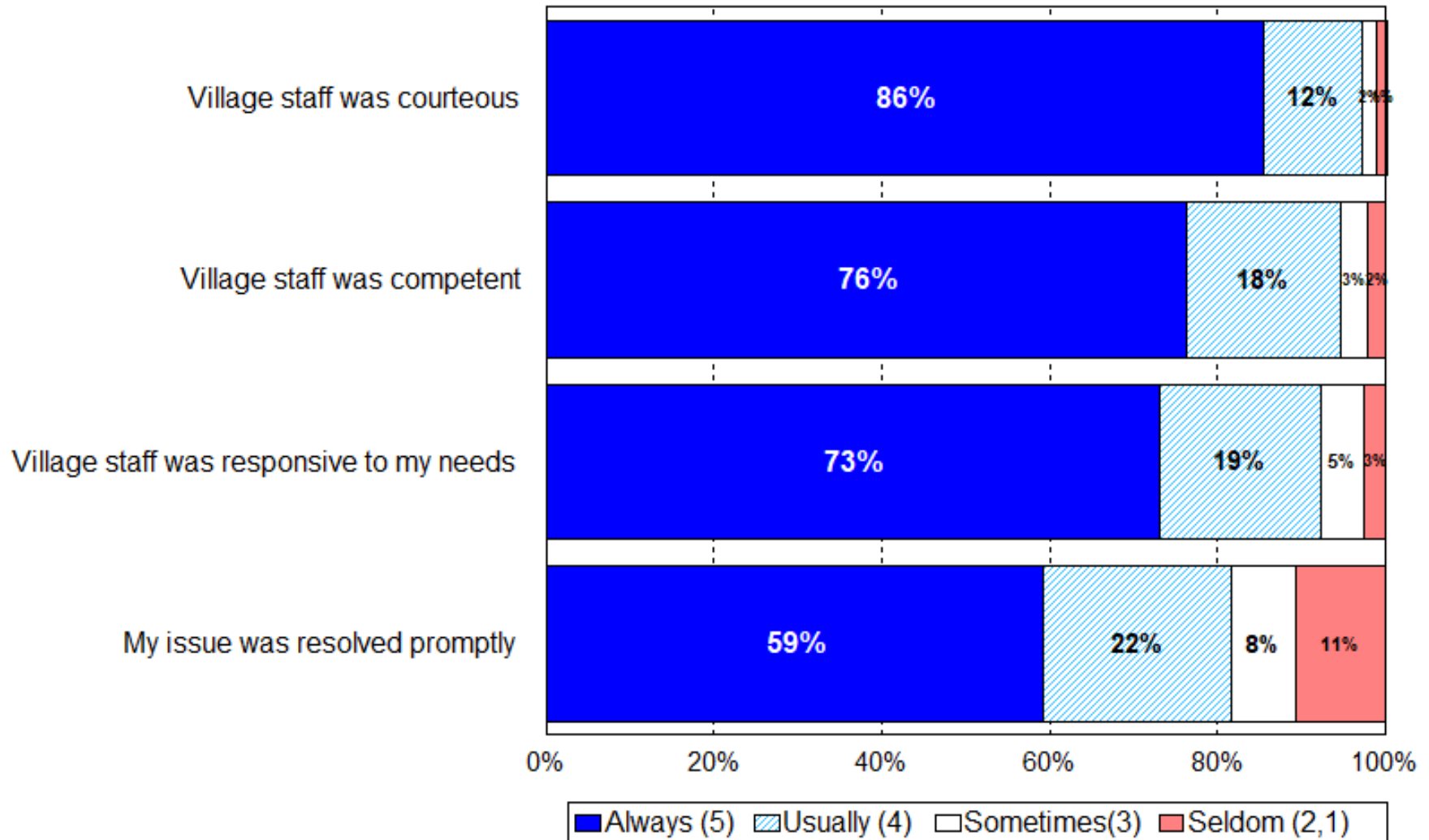
by percentage of respondents (multiple selections could be made)



Source: ETC Institute DirectionFinder (2019 - Pinehurst, NC)

Q22a. Please rate your experience with Village employees on the following behaviors:

by percentage of respondents that have contacted the Village in the past year

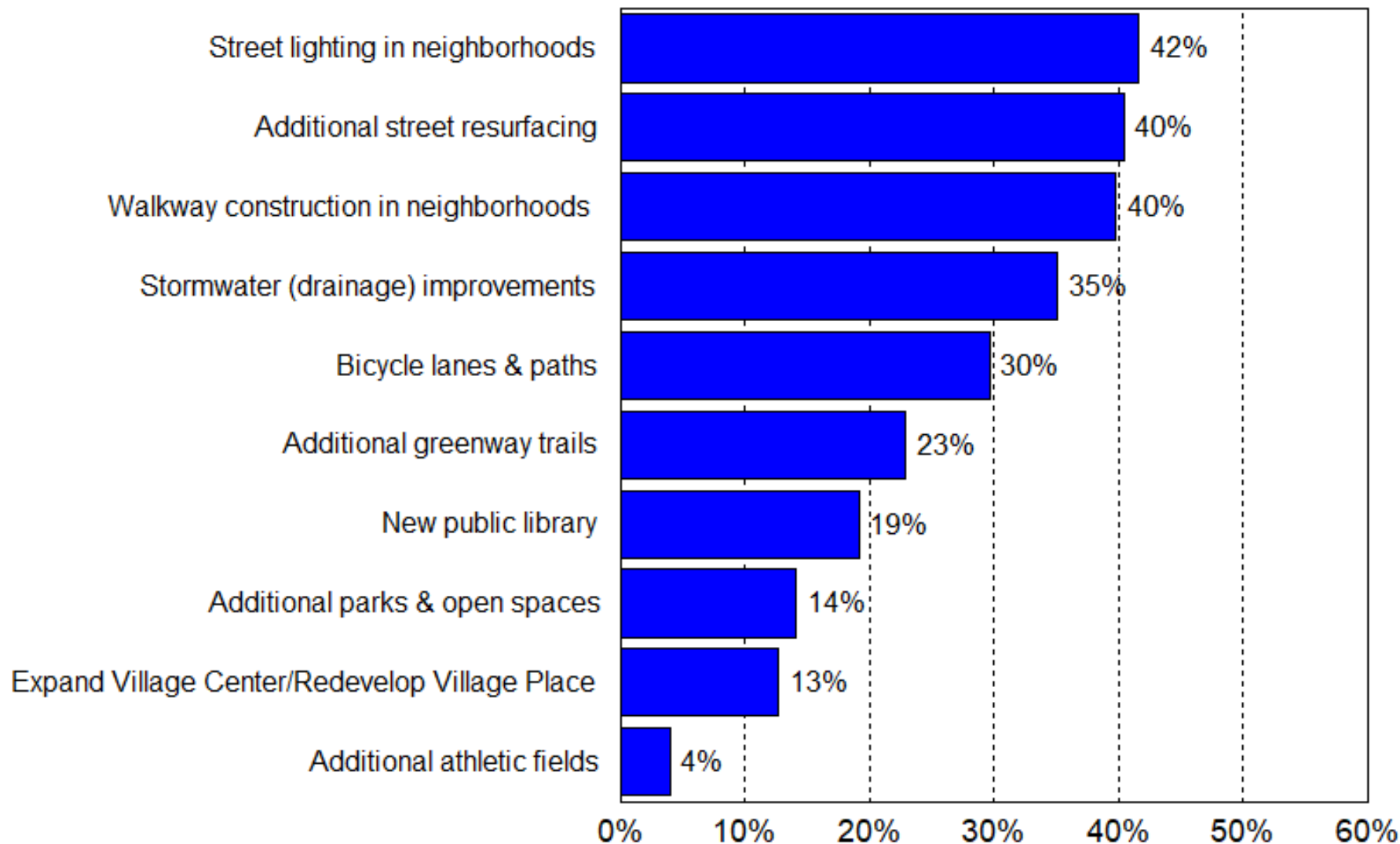


Source: ETC Institute DirectionFinder (2019 - Pinehurst, NC)

Village Employees Received Very High Ratings in All Areas of Customer Service

Q23. Capital Improvements That Residents Feel Are the Most Important

by percentage of respondents (3 selections could be made)



Source: ETC Institute DirectionFinder (2019 - Pinehurst, NC)

Summary

Summary

- **Residents Have a Very Positive Perception of the Village**
 - ❑ 93% rated Pinehurst as excellent or good place to live
 - ❑ 94% would recommend Pinehurst to others as a place to live
- **Satisfaction Ratings Are Similar to 2018, and Remain Among the Highest in the Nation**
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Questions?

THANK YOU!!