

Village of Pinehurst Business Survey

Findings Report

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2019

Submitted to the Village of Pinehurst, North Carolina

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2019 Village of Pinehurst Business Survey Executive Summary Report

Purpose and Methodology

ETC Institute administered a business survey to businesses in the Village of Pinehurst during the summer of 2019. The survey was administered for the eighth time as part of the Village's efforts to assess how well they are meeting the needs of its businesses. The survey results will help Village leaders and elected officials set community priorities including staffing and budget expenditures, determine areas or services that need improvement, and identify future needs.

The four-page survey and cover letter were mailed to a sample of businesses in the Village of Pinehurst. The cover letter explained the purpose of the survey and encouraged business leaders to either return their survey by mail or complete the survey online. Ten days after the surveys were mailed, ETC Institute sent emails and placed phone calls to the businesses that received the survey to encourage participation. The emails contained a link to the on-line version of the survey to make it easy for businesses to complete the survey. A total of 80 completed surveys were collected from businesses in the Village of Pinehurst.

The percentage of "don't know" responses has been excluded from many of the graphs shown in this report to be consistent with the presentation of the resident responses. Since the number of "don't know" responses often reflects the utilization and awareness of services, the percentage of "don't know" responses has been provided in the tabular data section of this report. When the "don't know" responses have been excluded, the text of this report will indicate that the responses have been excluded with the phrase "*who had an opinion.*"

This report contains:

- An executive summary of the methodology for administering the survey and major findings,
- charts and graphs for each question on the survey, including short-term and long-term trend comparisons (section 1)
- importance-satisfaction analysis; this analysis was done to determine priority actions for the Village to address based upon the survey results (section 2),
- tables that show the results of the random sample for each question on the survey (section 3),
- a copy of the survey instrument (section 4).

Major Findings

- **Use of Village Services.** The services that the highest percentage of businesses have used in the past year were: fire inspections (65%), police patrol (43%), streets and grounds (33%), and building inspections (33%). All services and departments except fire emergency response saw an increase in use over the past year.
- **Satisfaction with Village Services and Departments.** The services that had the highest levels of satisfaction from businesses *who had an opinion* were: fire emergency response (100%), police patrol (98%), police emergency response (96%), Village Hall (front desk) (92%) and fire inspections (90%).
- **Most Important Village Services.** Based on the sum of the top three choices, areas that businesses rated as the most important were: (1) police emergency response (53%), (2) police patrol (50%), and (3) fire emergency response (43%).
- **Satisfaction with the Overall Quality of Village Services.** Half of the businesses surveyed (50%) feel the overall quality of services provided by the Village meets their expectations; 15% feel the overall quality of Village services is significantly higher than their expectations, 18% feel the overall quality of Village services exceeds their expectations, 5% feel the overall quality of Village services is below their expectations, and 3% feel the overall quality of Village service is significantly below their expectations.
- **Satisfaction with Various Village Services.** Most (91%) of the businesses surveyed *who had an opinion* indicated that they were satisfied with the cleanliness of streets and public areas; 90% were satisfied with the landscape and maintenance in right of ways and public areas, and 79% were satisfied with the condition of sidewalks.
- **Perceptions of the Village.** Nearly all (98%) of the businesses surveyed *who had an opinion* indicated that they were satisfied with the overall feeling of safety in the Village; 89% were satisfied with the overall quality of life, and 87% were satisfied with the overall image of the Village.
- **Likelihood of Recommending the Village as a Business Location.** Sixty-six percent (66%) of businesses would be very likely or likely to recommend the Village as a business location to friends, family and co-workers; 22% would be somewhat likely to recommend the Village as a business location to friends, family and co-workers, and only 6% would not be likely to recommend the Village as a business location.
- **Business Atmosphere Compared to Two Years Ago.** Thirty-three percent (33%) of businesses feel the overall business atmosphere in the Village is better than two years ago; 43% feel there has been no change, but the atmosphere is good; 3% feel there has been no change, but the atmosphere is poor, and 8% feel the atmosphere is worse.

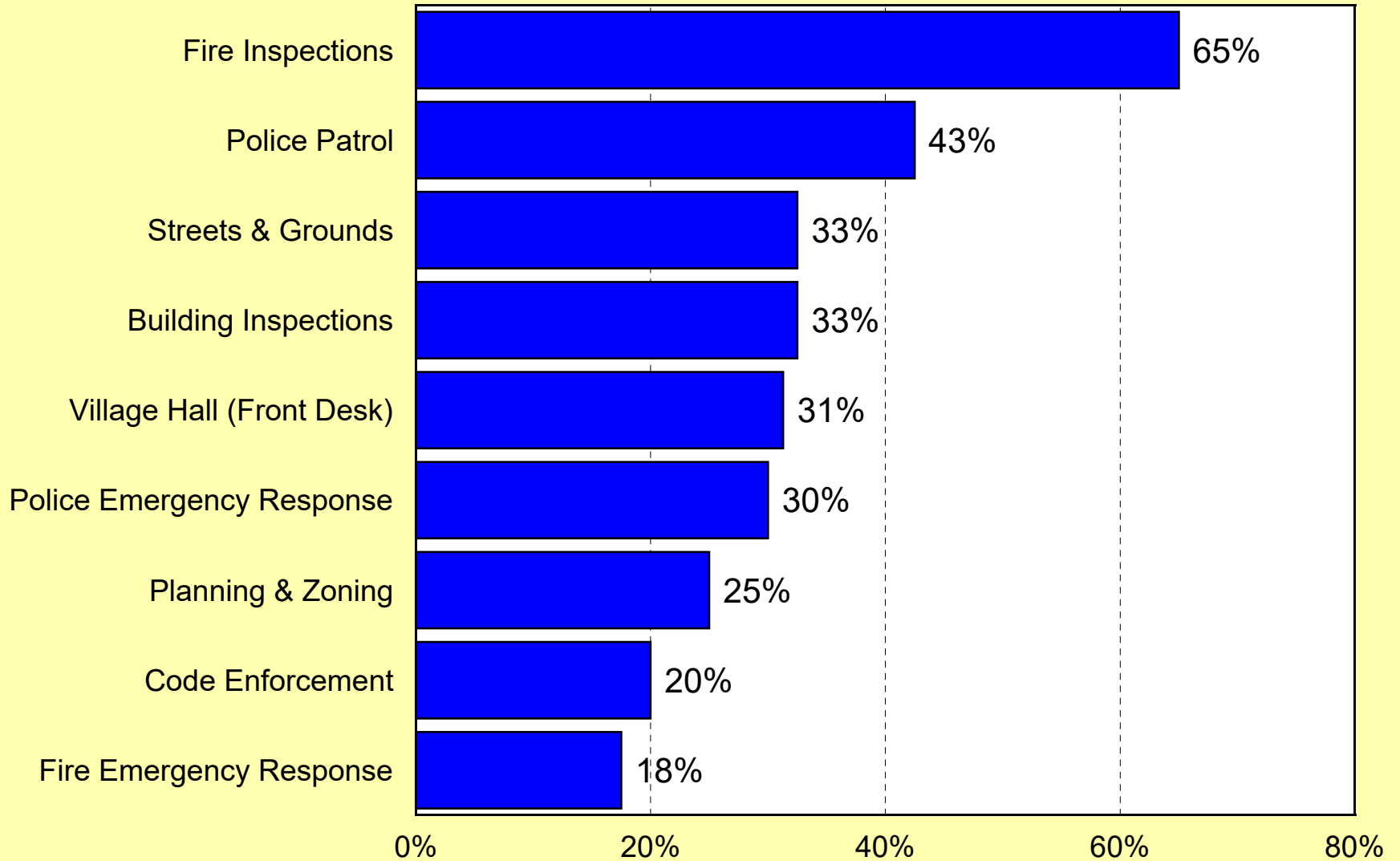
- **Village Customer Service.** Thirty-three percent (33%) of businesses rated the customer service from the Village as very good; 48% rated customer service as good, and only 3% rated the customer service from the Village as poor.
- **Level of Agreement with Statements About Customer Service from Village Staff.** Eighty-seven percent (87%) of the businesses surveyed *who had an opinion* agreed that the Village staff was courteous during their most recent interaction with them; 85% agreed that Village staff was competent; 80% agreed that Village staff was responsive to their needs, and 76% agreed that their issue was resolved promptly.
- **Satisfaction with Village Communications with Businesses.** Nearly two-thirds (63%) of businesses were satisfied with the job the Village does communicating with business owners, compared to only 8% who were dissatisfied.
- **Village Website.** Of the 55% of business that visited the Village’s website (www.vopnc.org) during the past 12 months, 81% *who had an opinion* rated the availability of information on the Village’s website as “very good” or “good,” and 74% rated the ease of navigation as “very good” or “good.”. Eighty percent (80%) of those who have visited the Village’s website indicated they were either “very satisfied” or “satisfied” with the website.
- **Village Mobile App.** Ten percent (10%) of businesses indicated they used the Village’s mobile app (MY VOP) during the past 12 months. All of those who have used it indicated they were “very satisfied” or “satisfied.”
- **Community Development (Codes and Ordinances).** Sixty-five percent (65%) of the businesses *who had an opinion* were satisfied (rating of 4 or 5 on a 5-point scale) with historic district guidelines; 61% were satisfied with business signage regulations, and 58% zoning ordinances, and 58% were satisfied with business signage and regulations.
- **Impact of Various Cultural and Entertainment Opportunities.** Forty-nine percent (49%) of the businesses surveyed feel the Holly Arts and Crafts Festival has a positive impact on their business; 45% feel parades in the Village Center have a positive impact on their business; 44% feel tree lighting has a positive impact, and 43% feel the Farmer’s Markets have a positive impact on their business.
- **Satisfaction with the Way the Village handles Events That Attract Large Crowds.** Sixty-five percent (65%) of businesses are satisfied with the way the Village handles events that attract large crowds.
- **Reasons Influencing Decision to Locate Business in the Village of Pinehurst.** Eighty-four percent (84%) of businesses surveyed indicated safety and security of the Village was either “extremely important” or “very important” in their decision to locate their business in the Village of Pinehurst. The other top reasons included overall image of the Village (78%) and overall quality of life in the Village (77%).

Section 1

Charts and Graphs

Q1. Have you used this service or department in the past year?

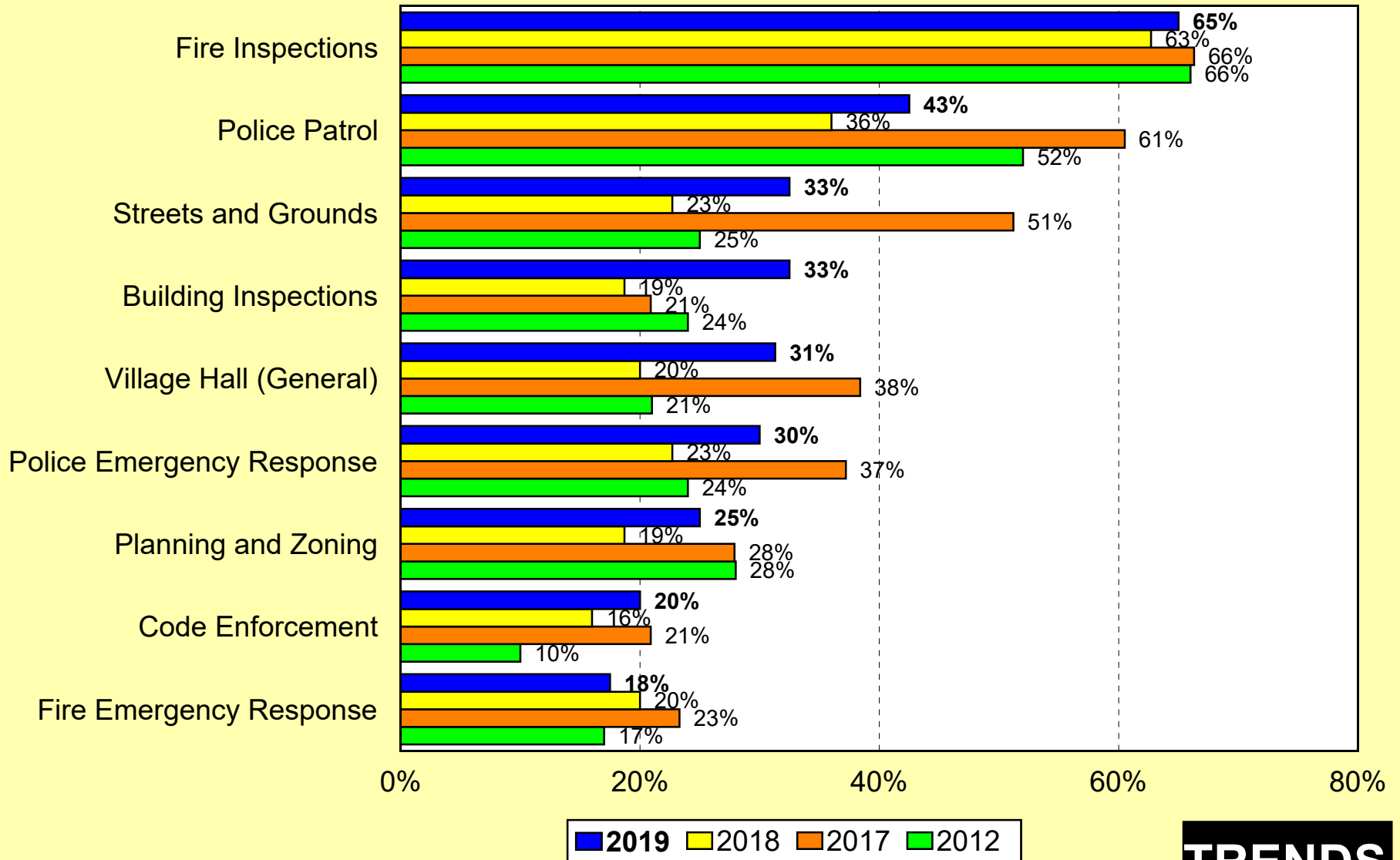
by percentage of respondents who answered "yes"



Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q1. Have you used this service or department in the past year? - 2012 to 2019

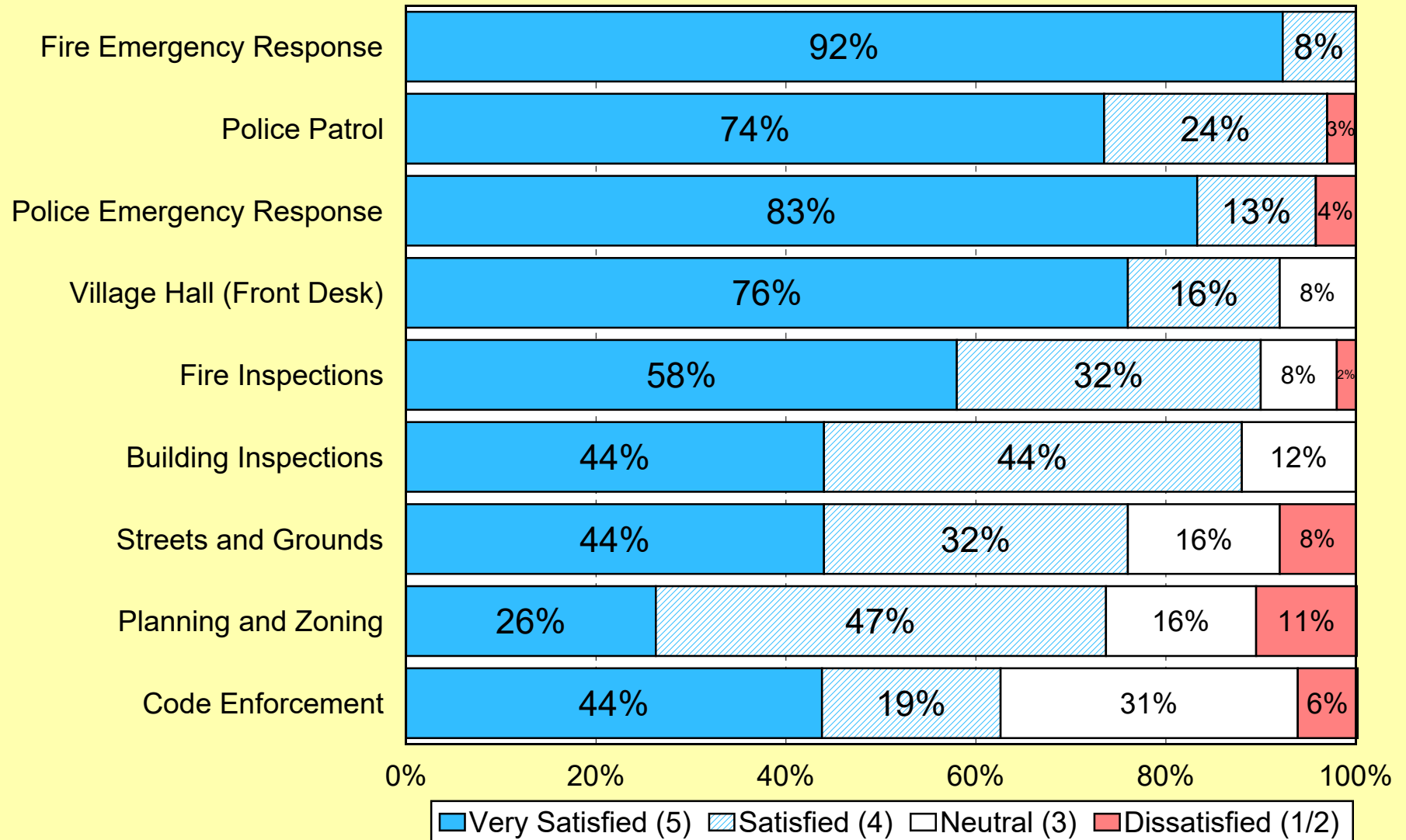
by percentage of respondents who answered "yes"



Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q1. Overall Satisfaction with Pinehurst Services or Departments Used in the Past Year

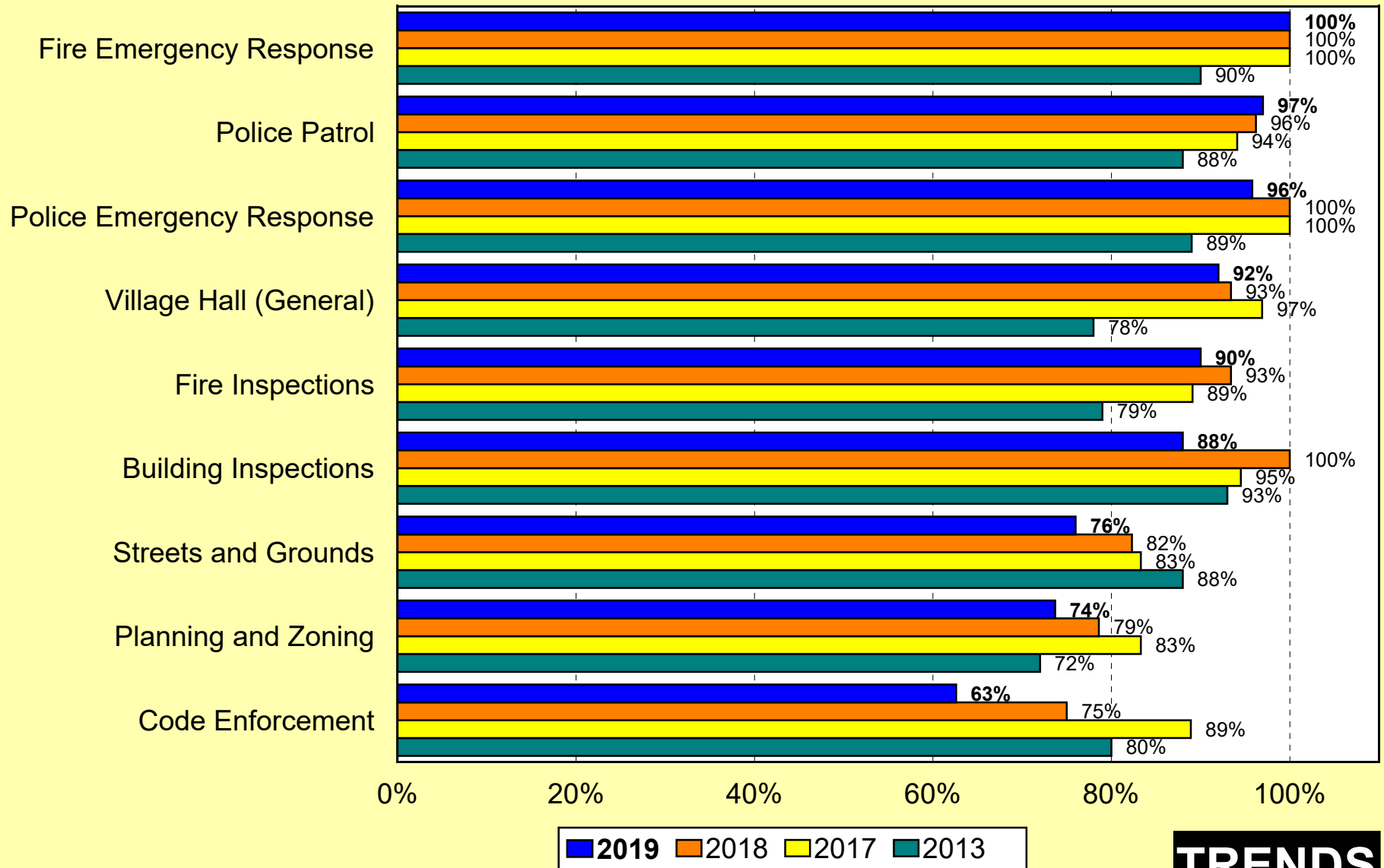
by percentage of respondents who had used the service or department and rated the item as a 1 to 5 on a 5-point scale (excluding "don't know")



Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q1. Overall Satisfaction with Pinehurst Services or Departments Used in the Past Year - 2013 to 2019

by percentage of respondents who answered "very satisfied" or "satisfied"

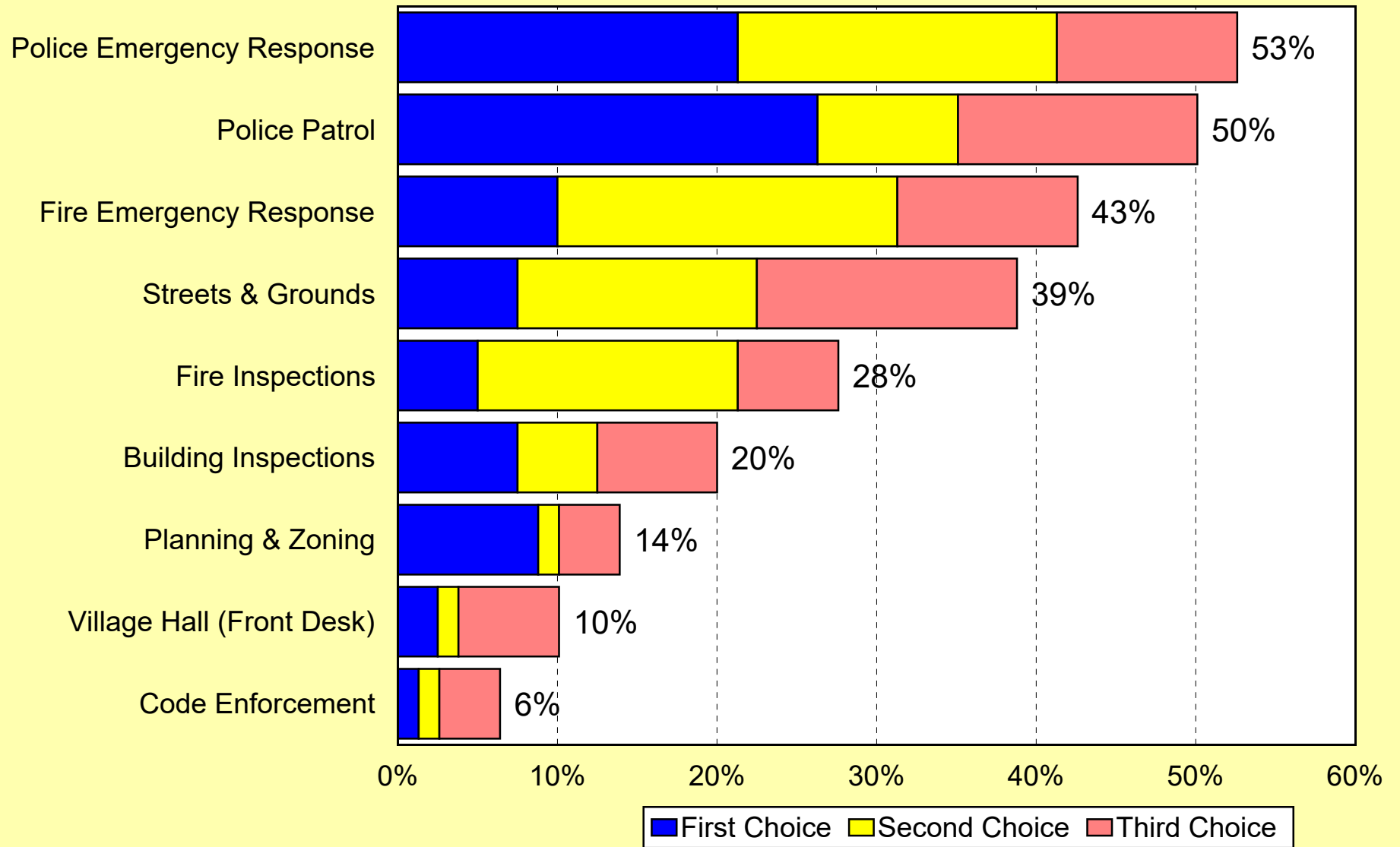


TRENDS

Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q2. Village Services or Departments Rated as the Most Important to Their Business

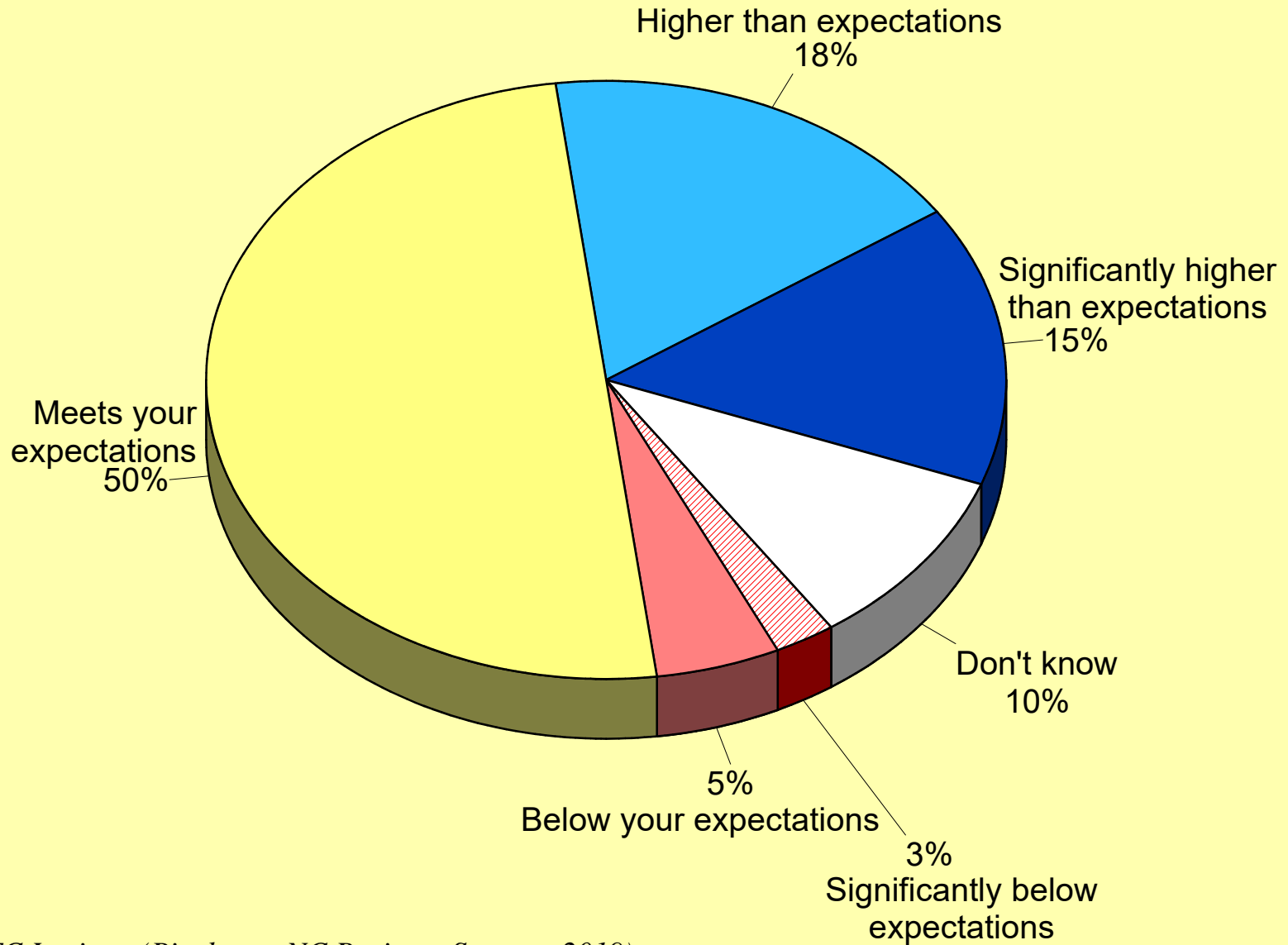
by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q3. Satisfaction with the Overall Quality of Services Provided to Your Business by the Village of Pinehurst

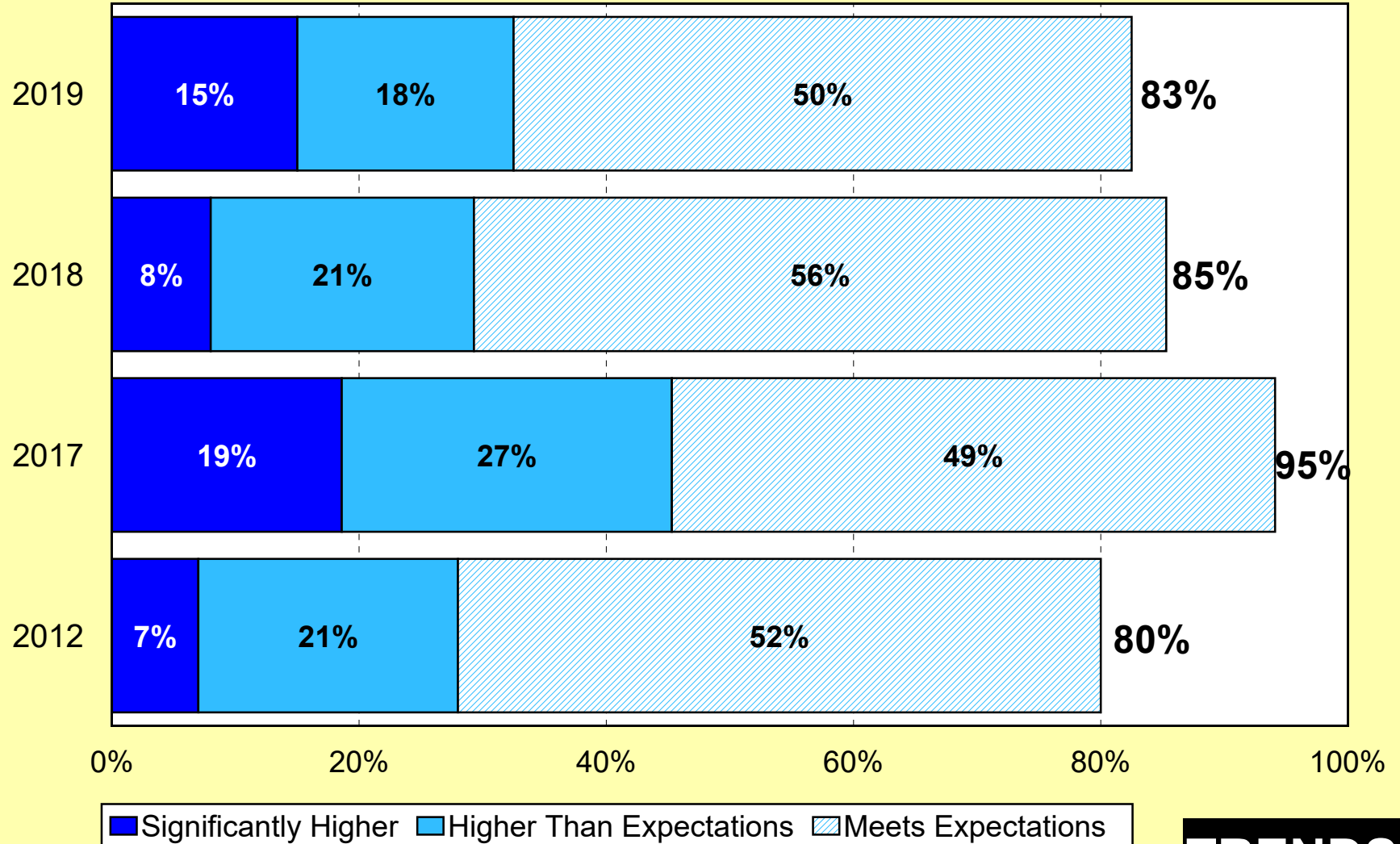
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q3. Satisfaction with the overall quality of services provided to your business by the Village of Pinehurst 2012 to 2019

by percentage of respondents

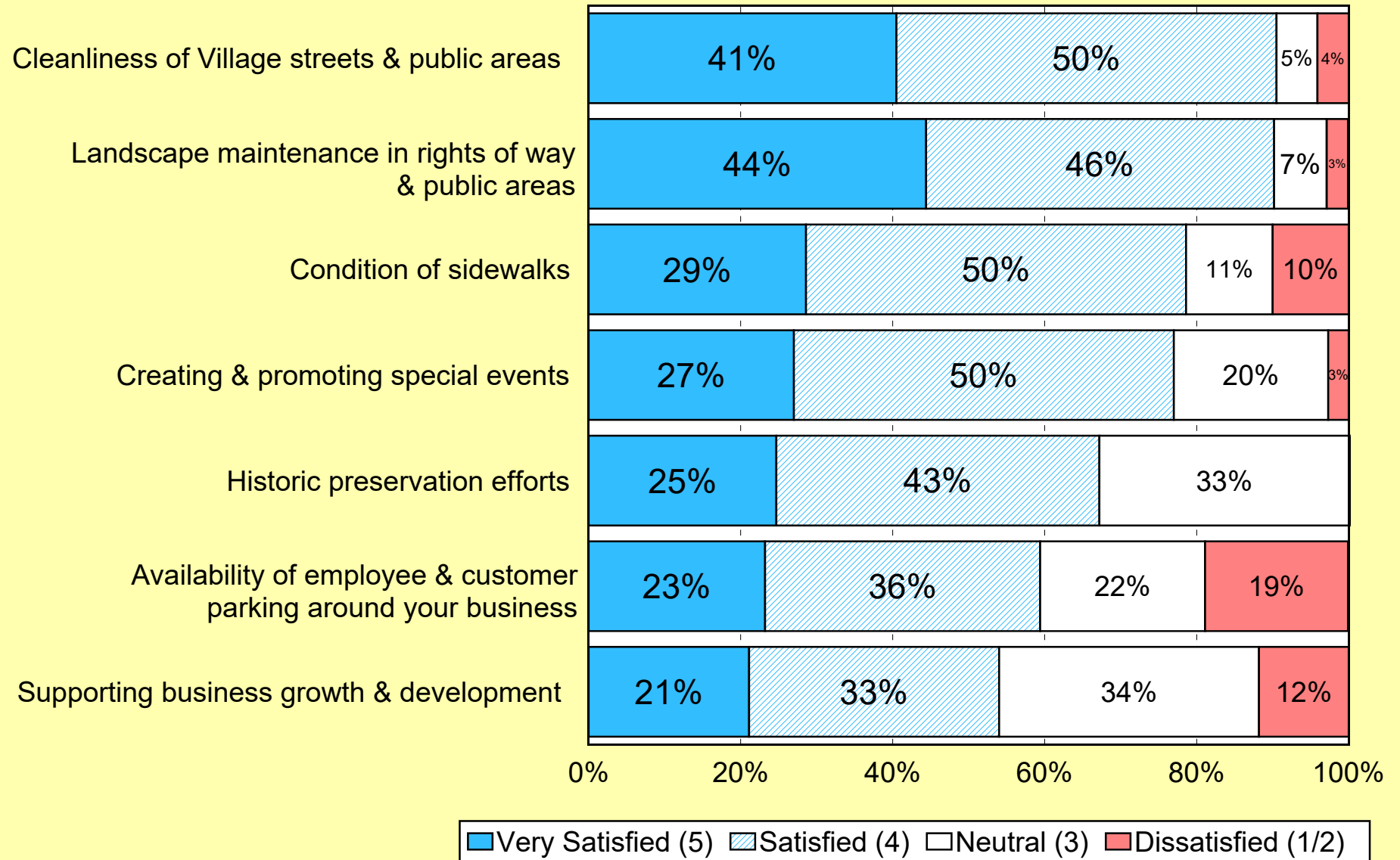


Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

TRENDS

Q4. Level of Satisfaction with the Village in Various Areas

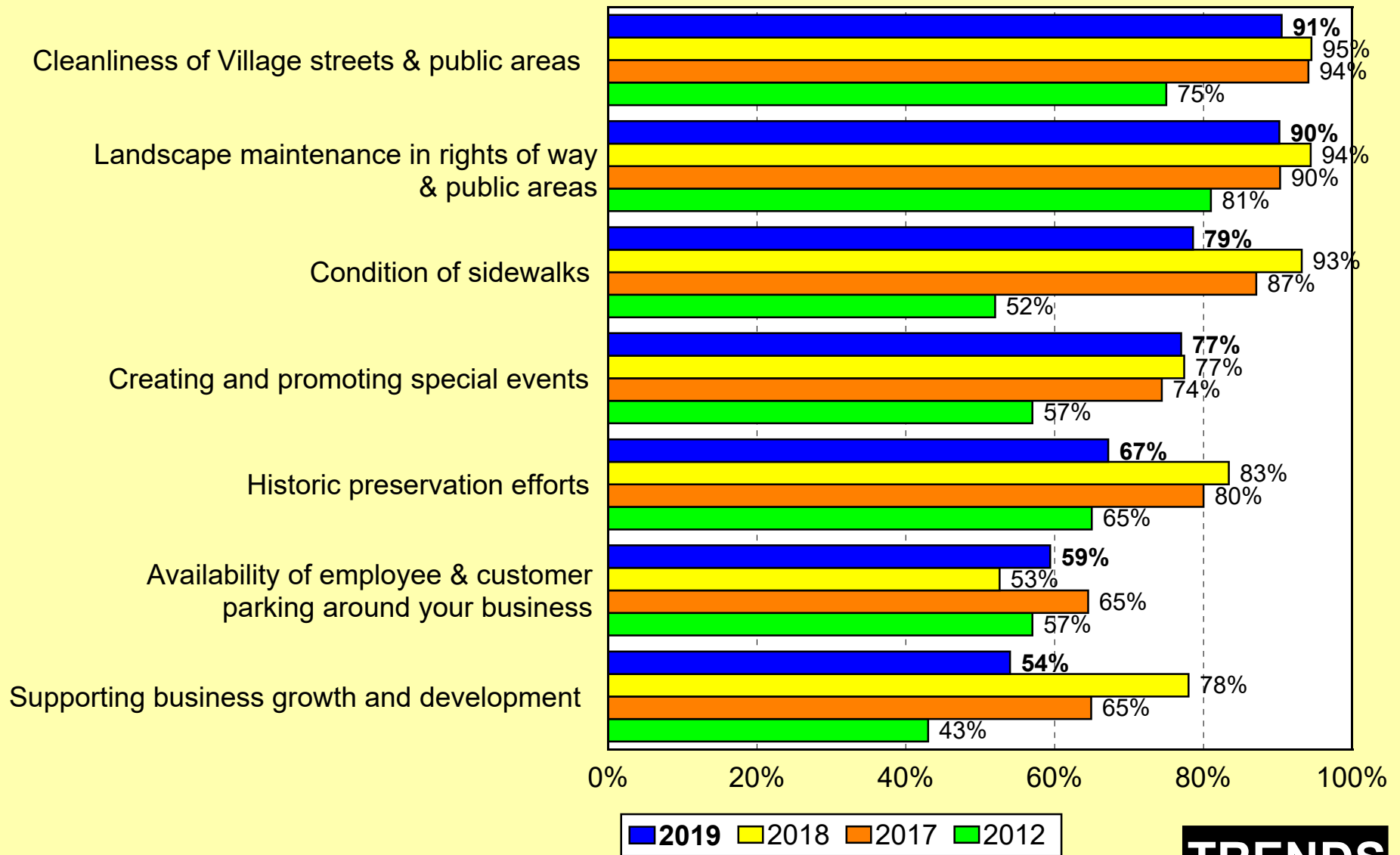
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding "don't know")



Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q4. Level of Satisfaction with the Village in Various Areas 2012 to 2019

by percentage of respondents who answered “very satisfied” or “satisfied”

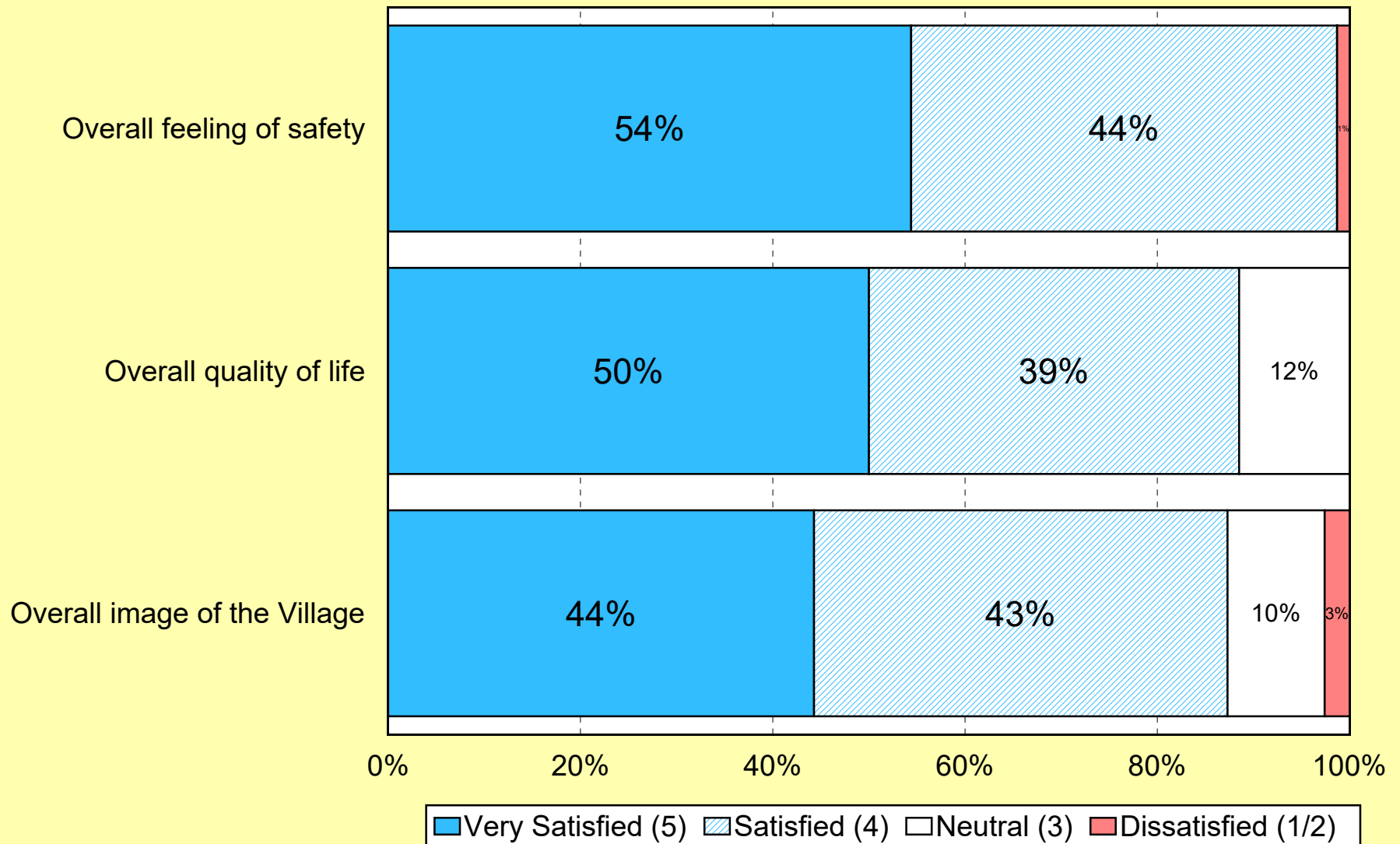


TRENDS

Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q5. Overall Satisfaction with Various Perceptions of the Village of Pinehurst

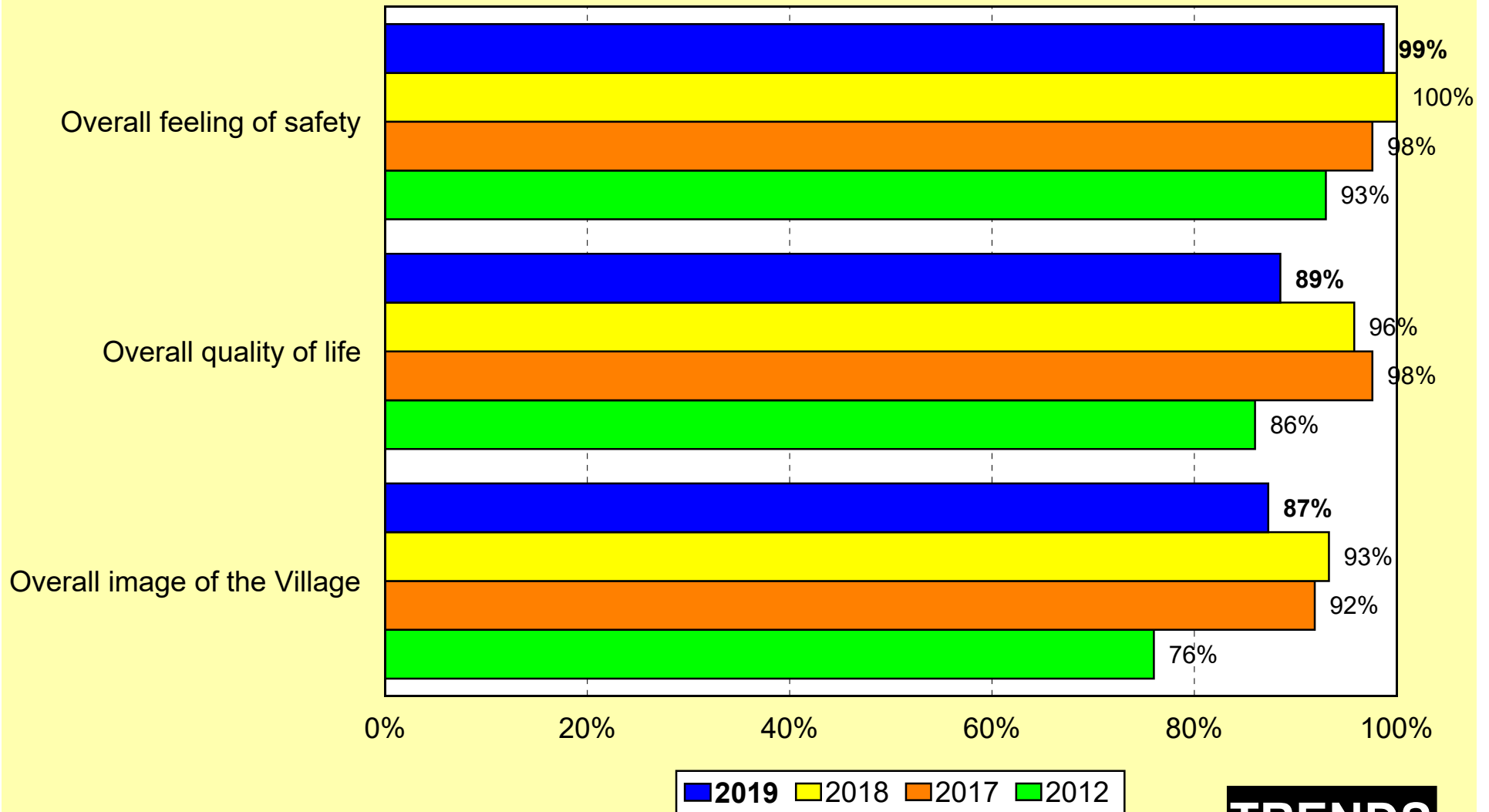
by percentage of respondents who had used the service or department and rated the item as a 1 to 5 on a 5-point scale (excluding "don't know")



Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q5. Overall Satisfaction with Various Perceptions of the Village of Pinehurst - 2012 to 2018

by percentage of respondents who had used the service or department and rated the item as a 4 or 5 on a 5-point scale (excluding "don't know")

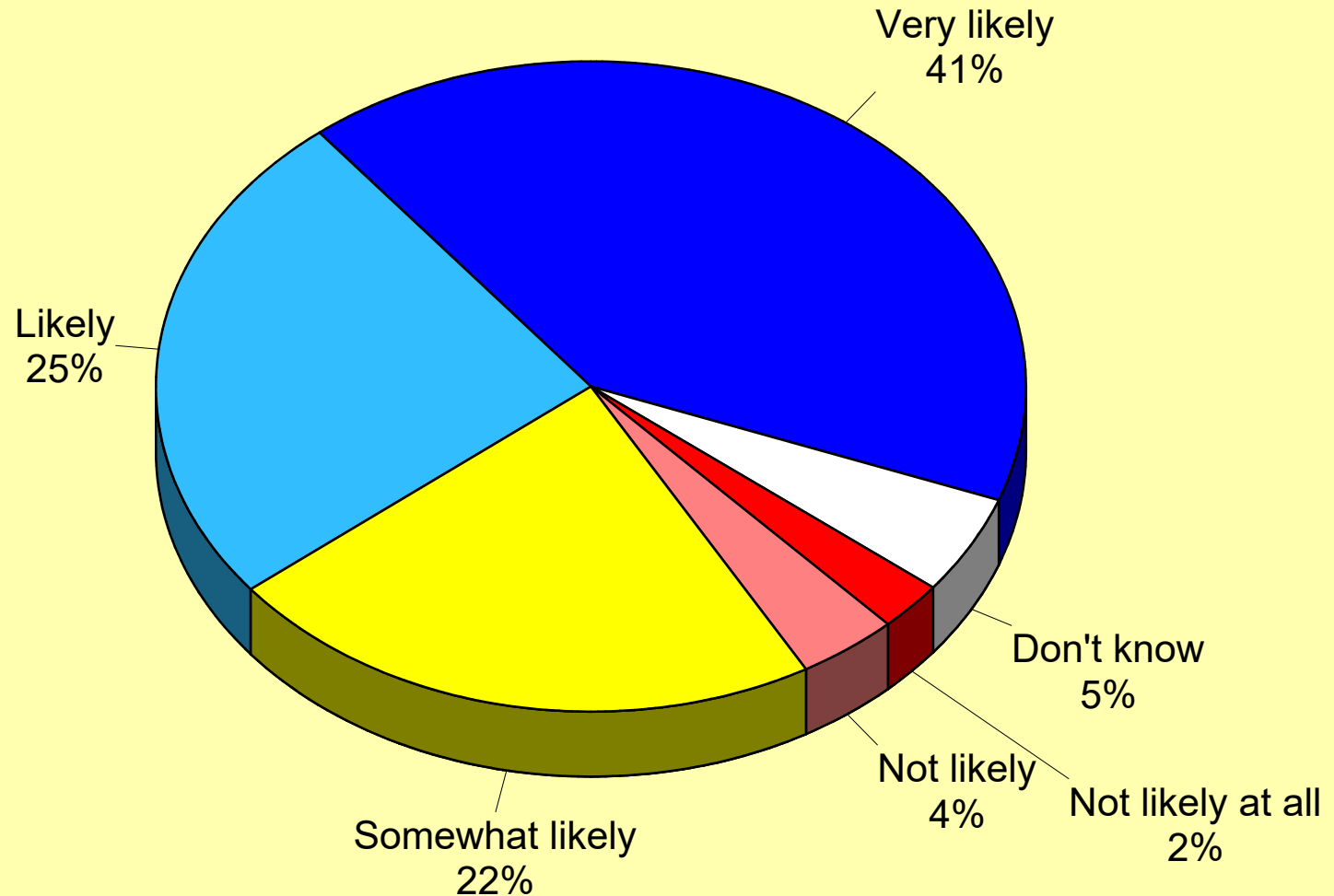


TRENDS

Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q6. How likely would you be to recommend the Village as a business location to friends, family, and co-workers?

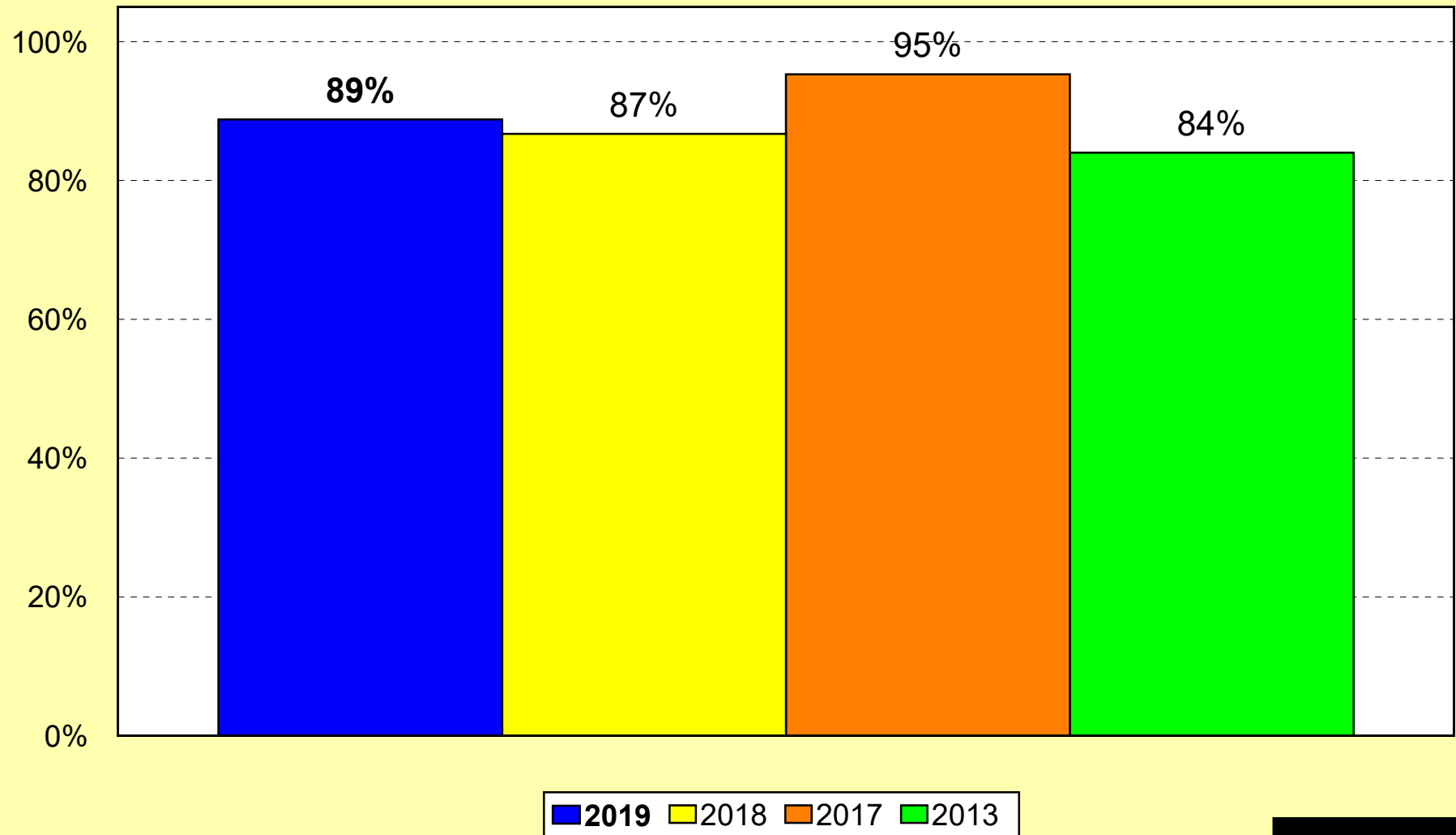
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q6. How likely would you be to recommend the Village as a business location to friends, family, and co-workers? 2013 to 2019

by percentage of respondents who answered "very likely," "likely," or "somewhat likely"

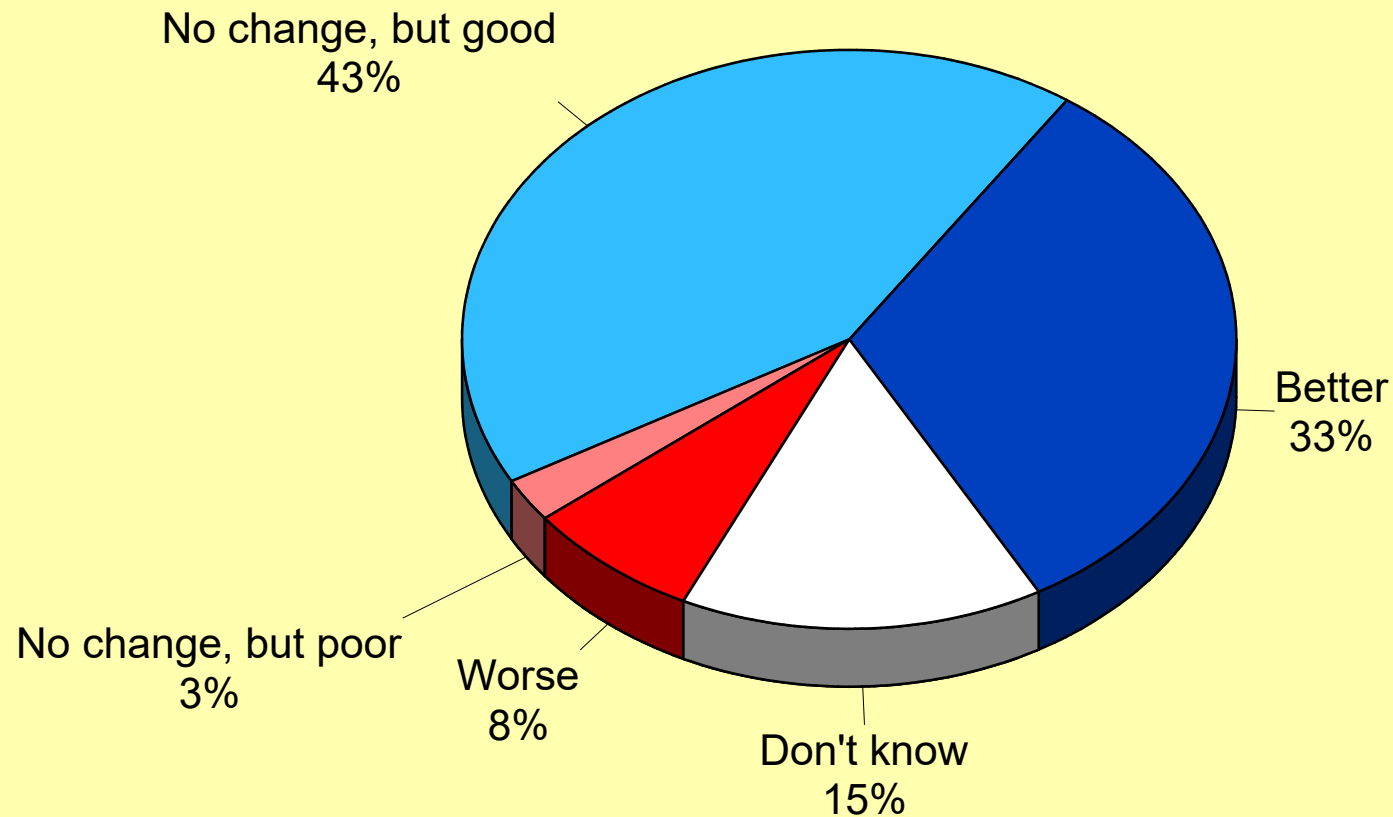


Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

TRENDS

Q7. How would you rate the overall business atmosphere in the Village of Pinehurst today, compared to two years ago?

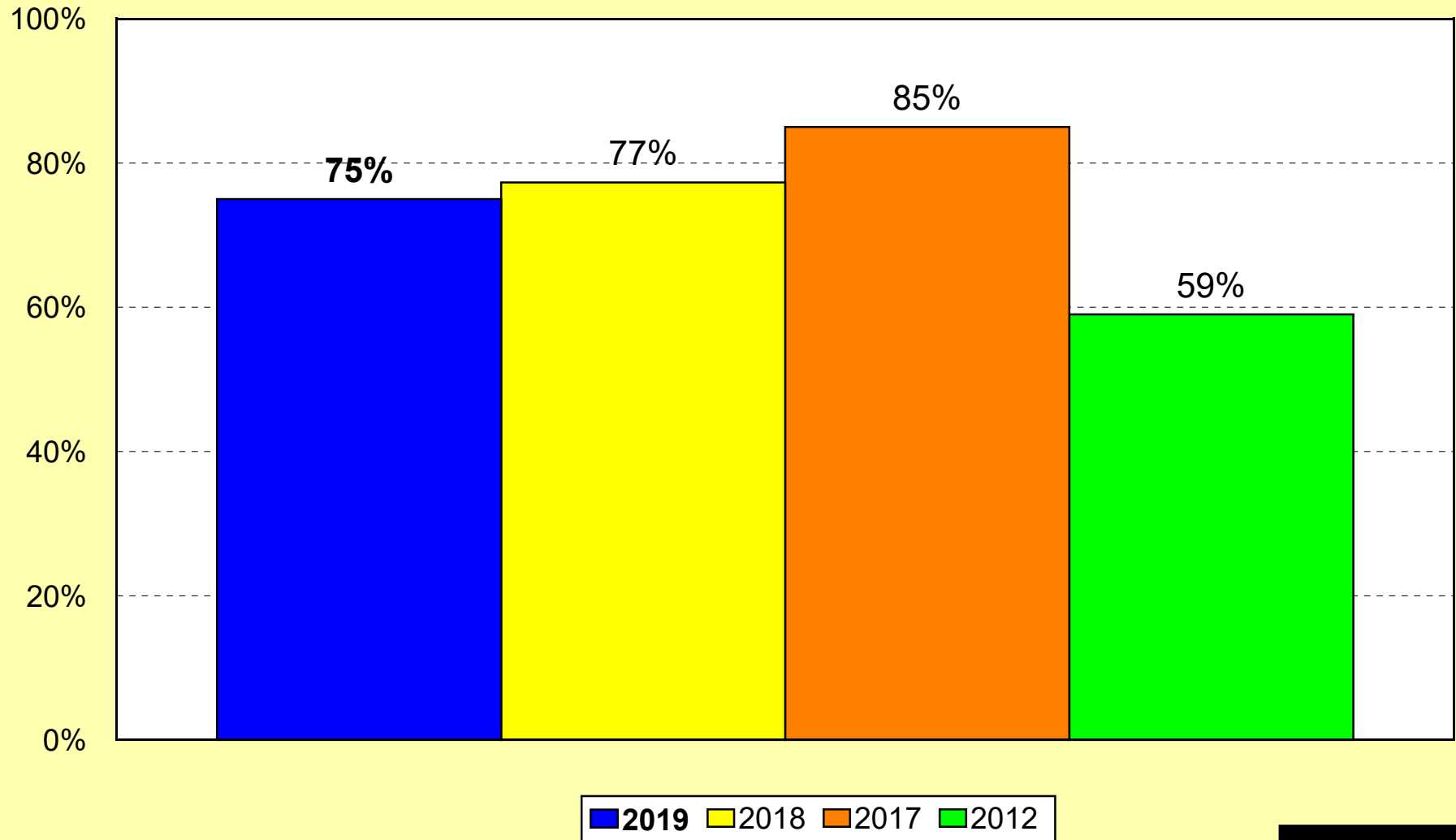
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q7. How would you rate the overall business atmosphere in the Village of Pinehurst today, compared to two years ago? 2012 to 2019

by percentage of respondents who answered "better" or "no change, but good"

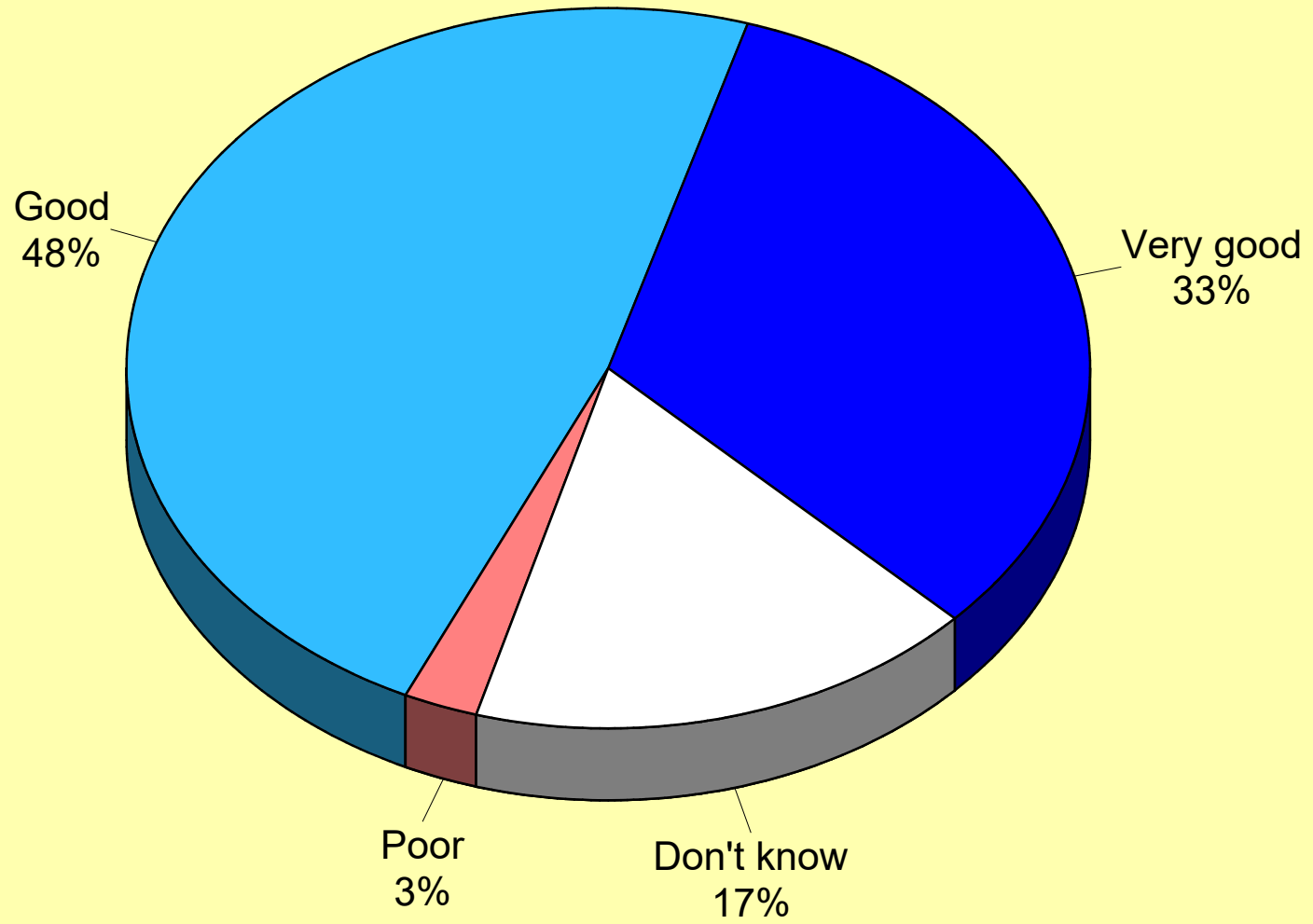


Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

TRENDS

Q8. How would you rate the Village of Pinehurst customer service?

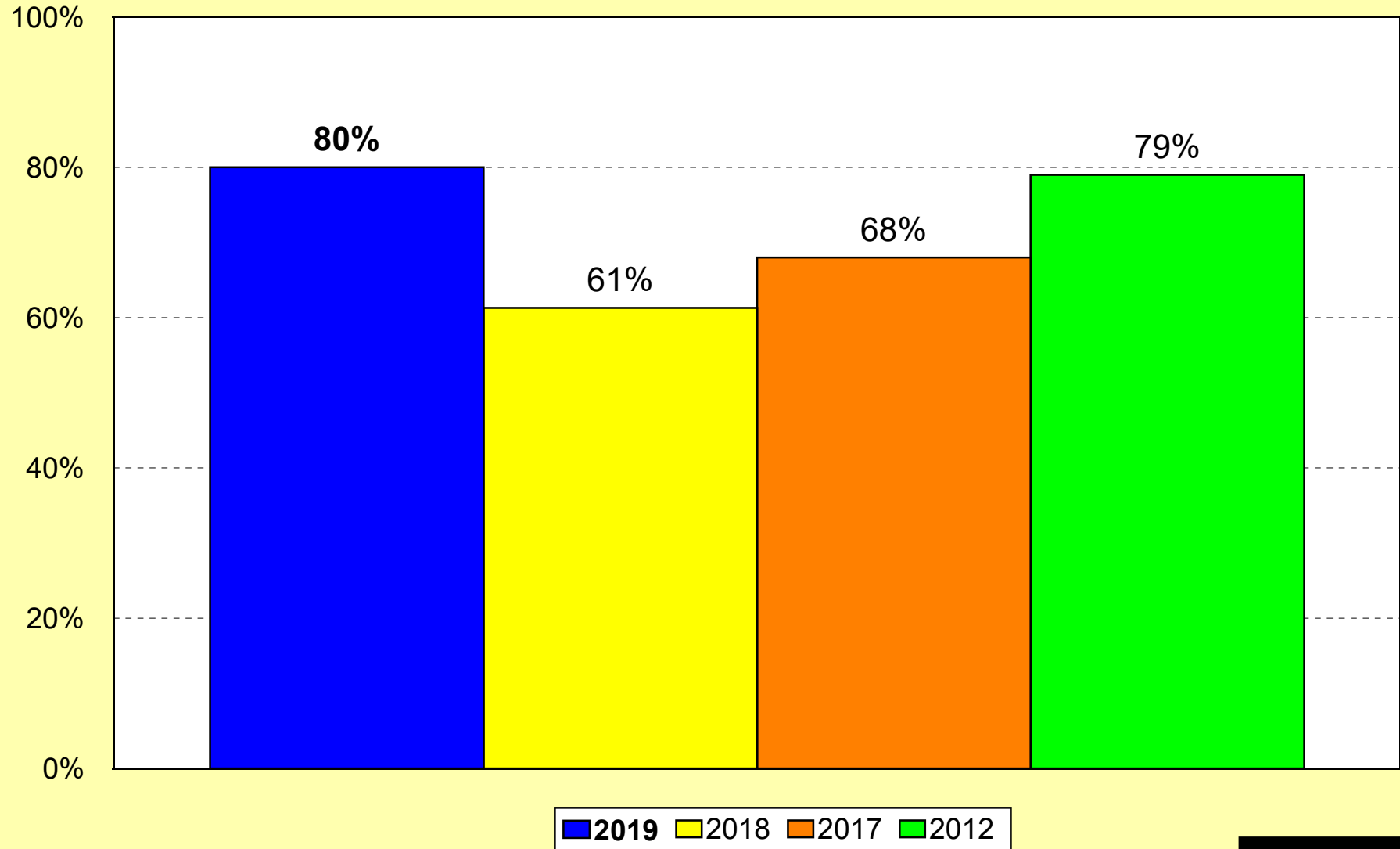
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q8. How would you rate the Village of Pinehurst customer service? - 2012 to 2019

by percentage of respondents who answered "very good" or "good"

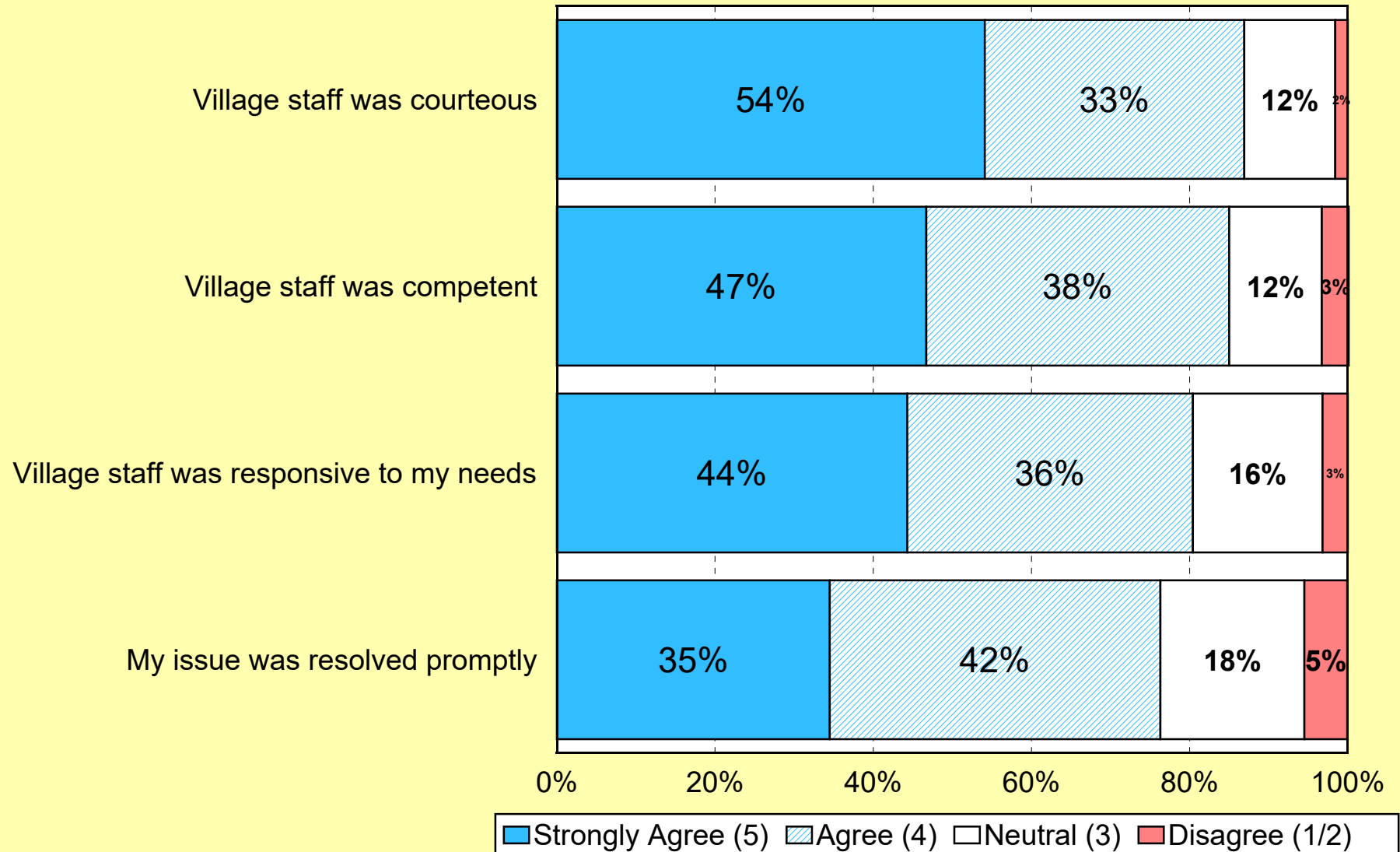


Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

TRENDS

Q9. Level of Agreement with Statements About Your Most Recent Contact with the Village Government Staff

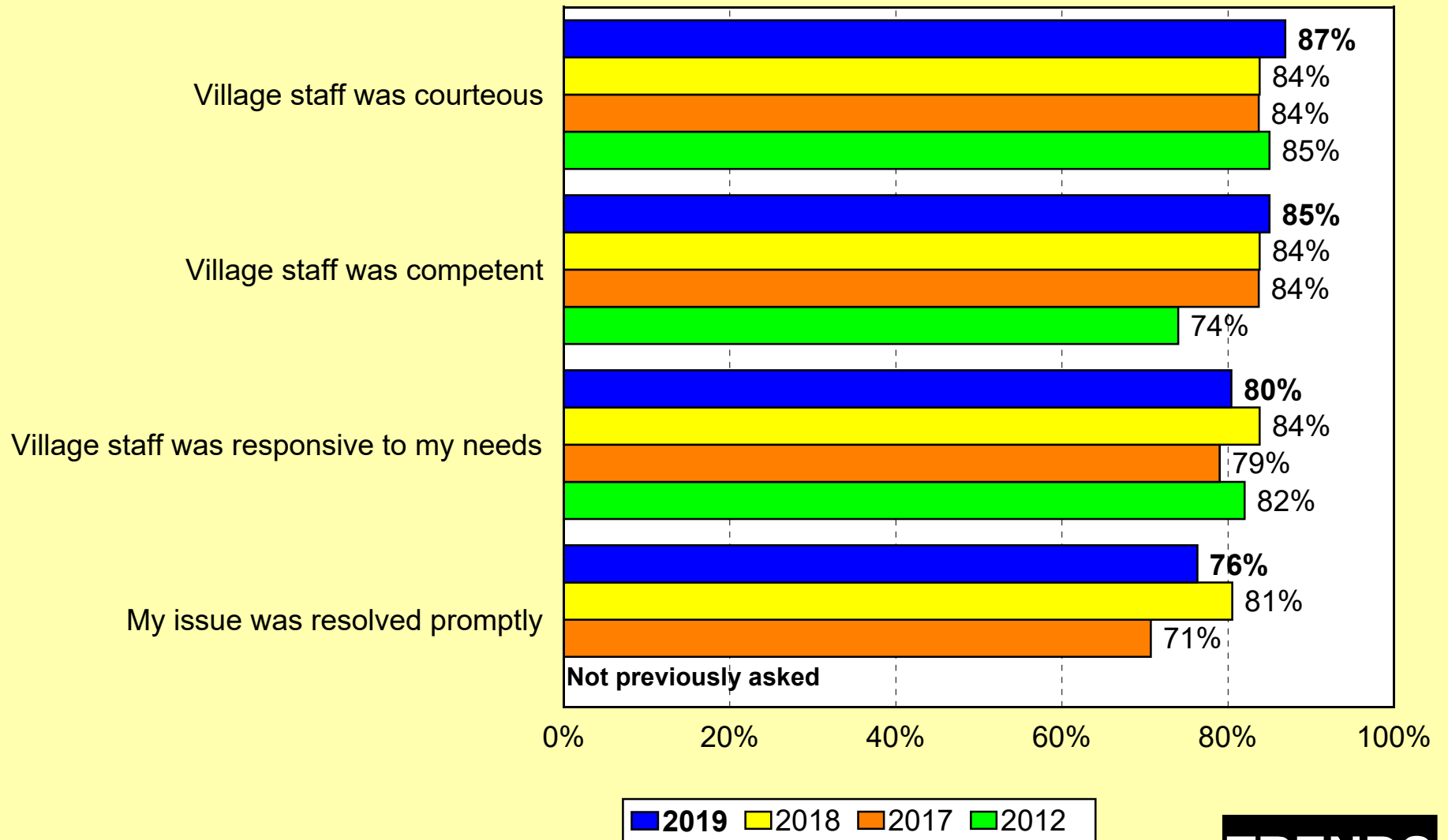
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding “don't know”)



Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q9. Level of Agreement with Statements About Your Most Recent Contact with the Village - 2012 to 2019

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

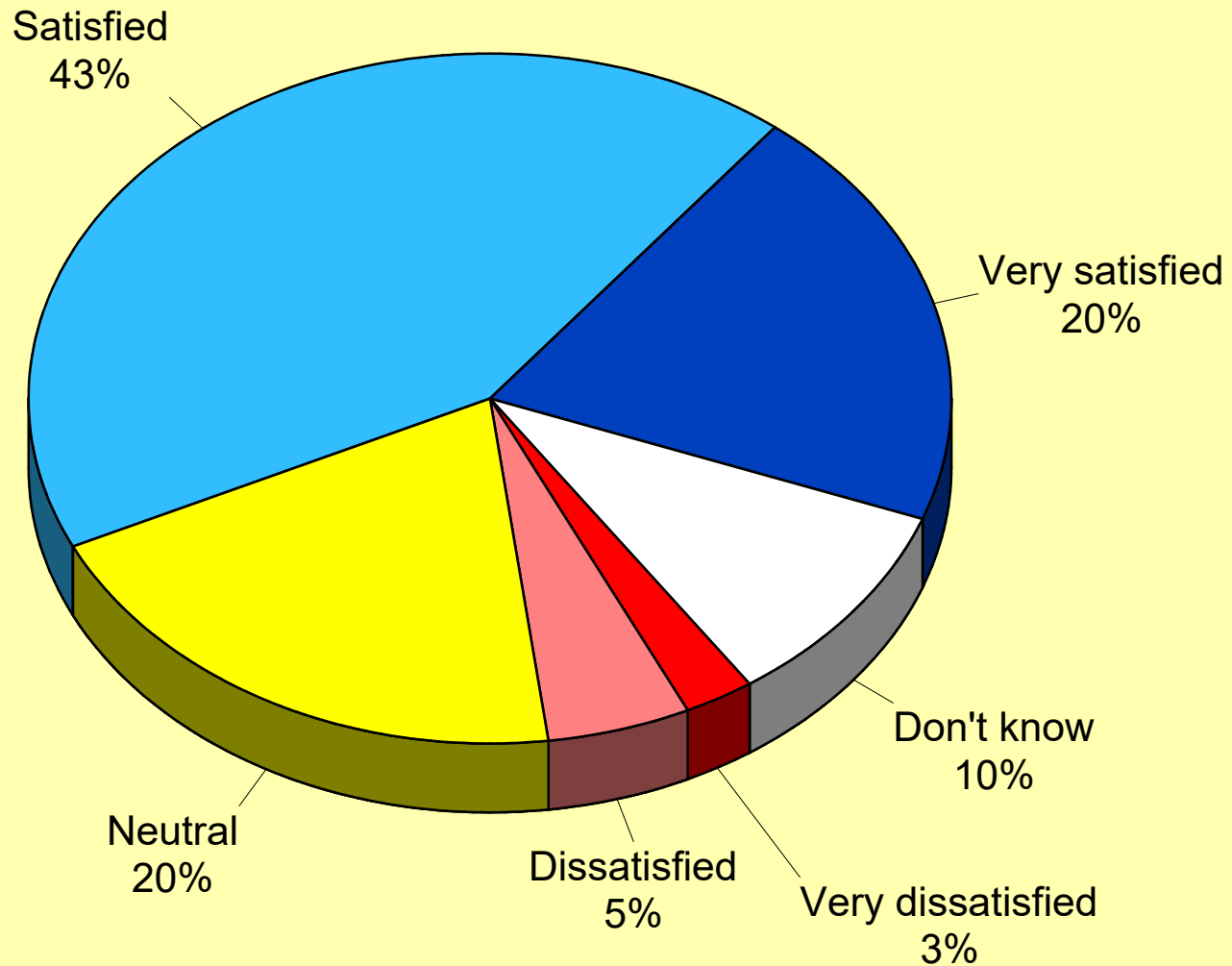


Source: ETC Institute (Pinehurst, NC Business Survey - 2019)



Q10. How satisfied are you with the job the Village of Pinehurst does communicating with business owners?

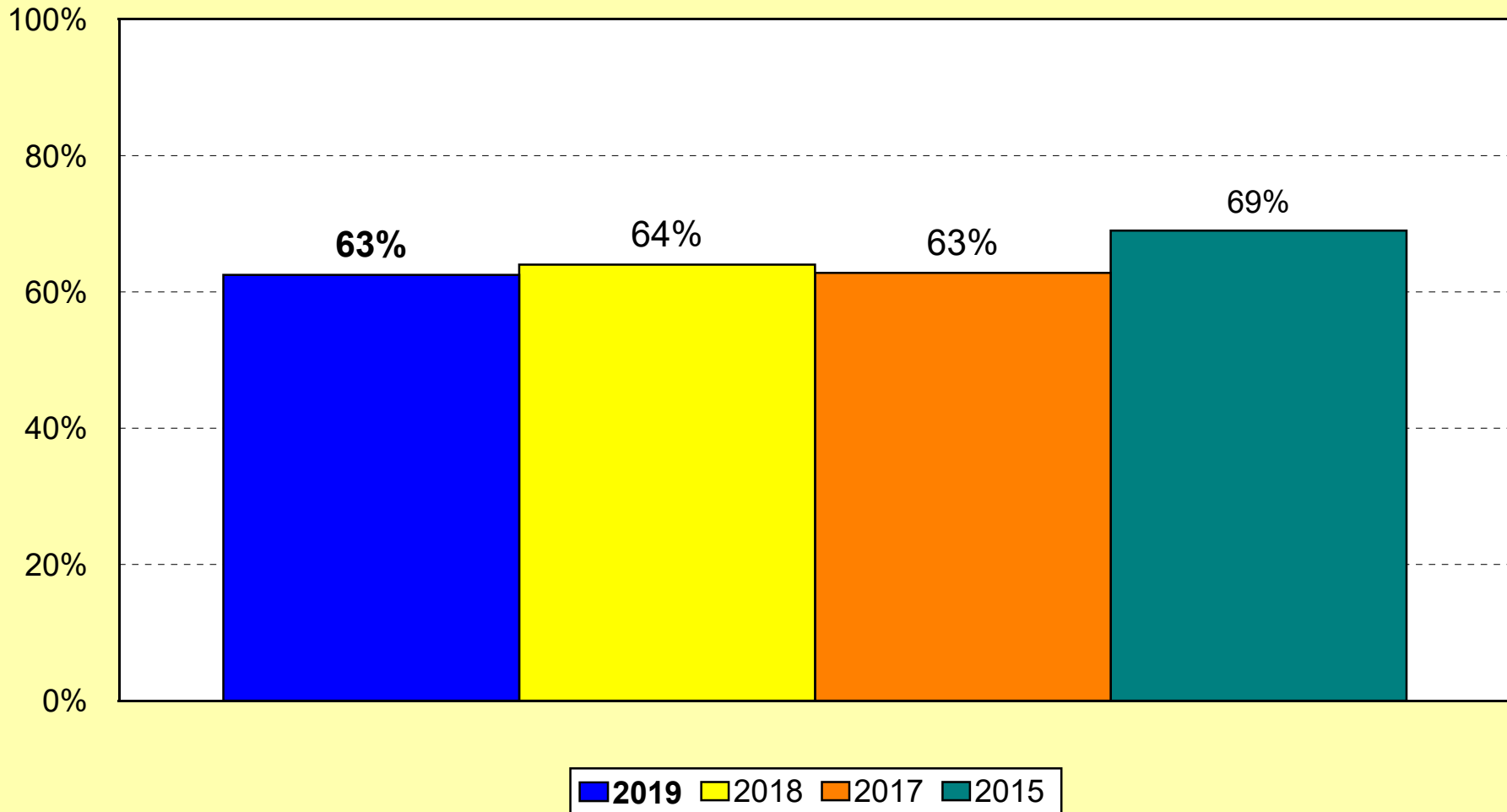
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q10. How satisfied are you with the job the Village of Pinehurst does communicating with business owners? 2015 to 2019

by percentage of respondents who answered "very satisfied" or "satisfied"

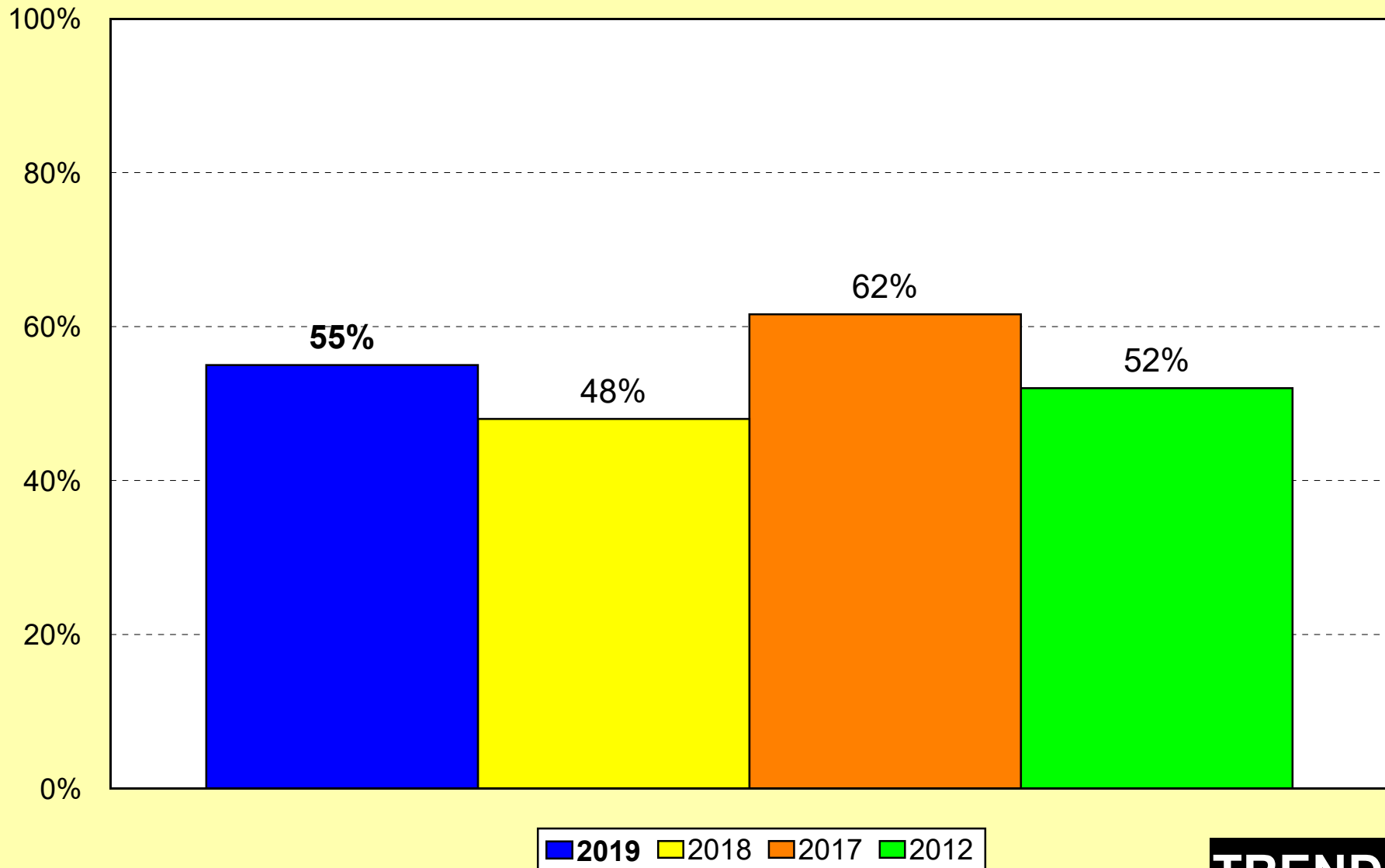


TRENDS

Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q11. Have you visited the Village's website (www.vopnc.org) during the past 12 months? - 2012 to 2019

by percentage of respondents who answered "yes"

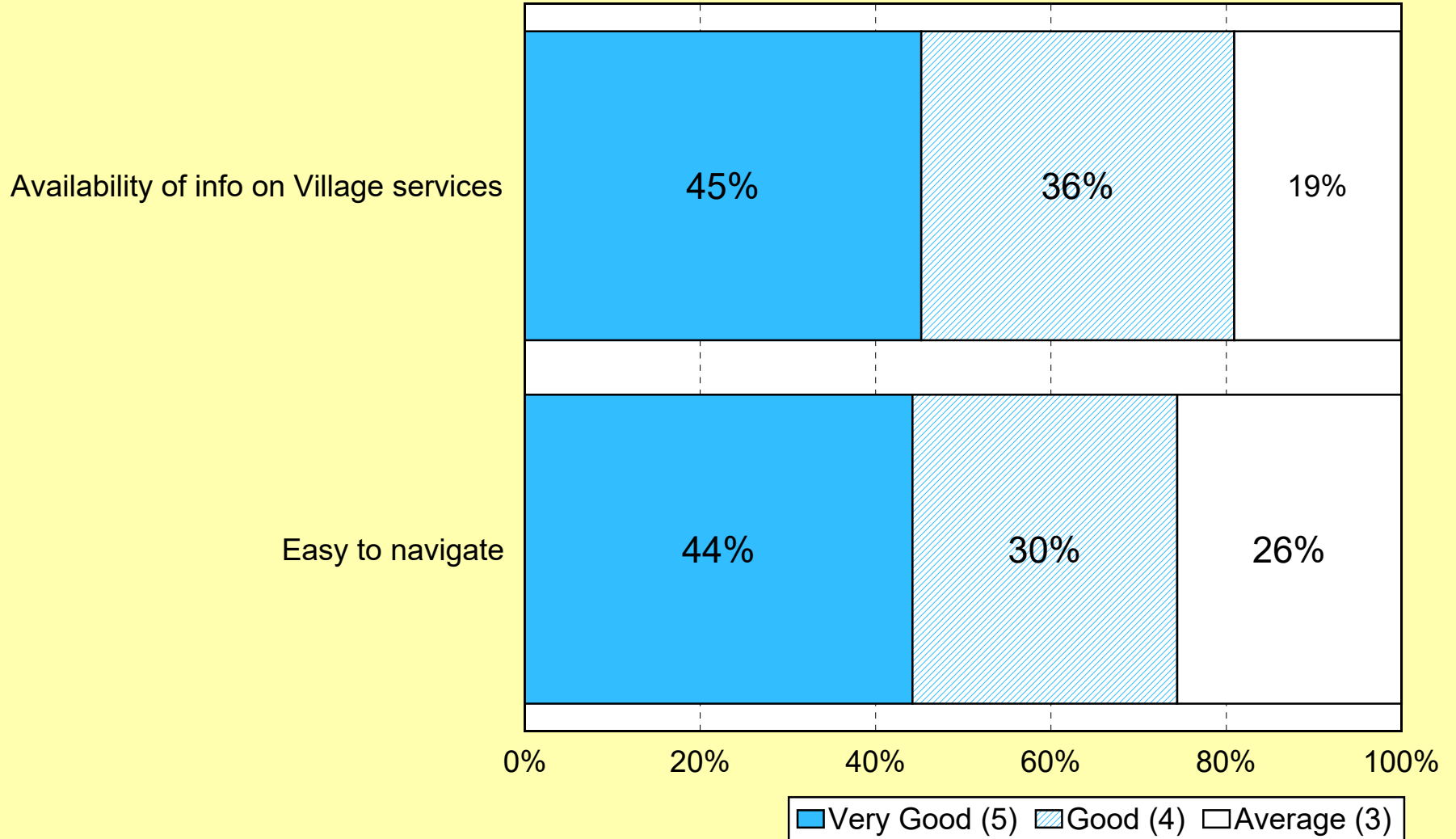


TRENDS

Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q11a. How would you rate the following characteristics of the Village website?

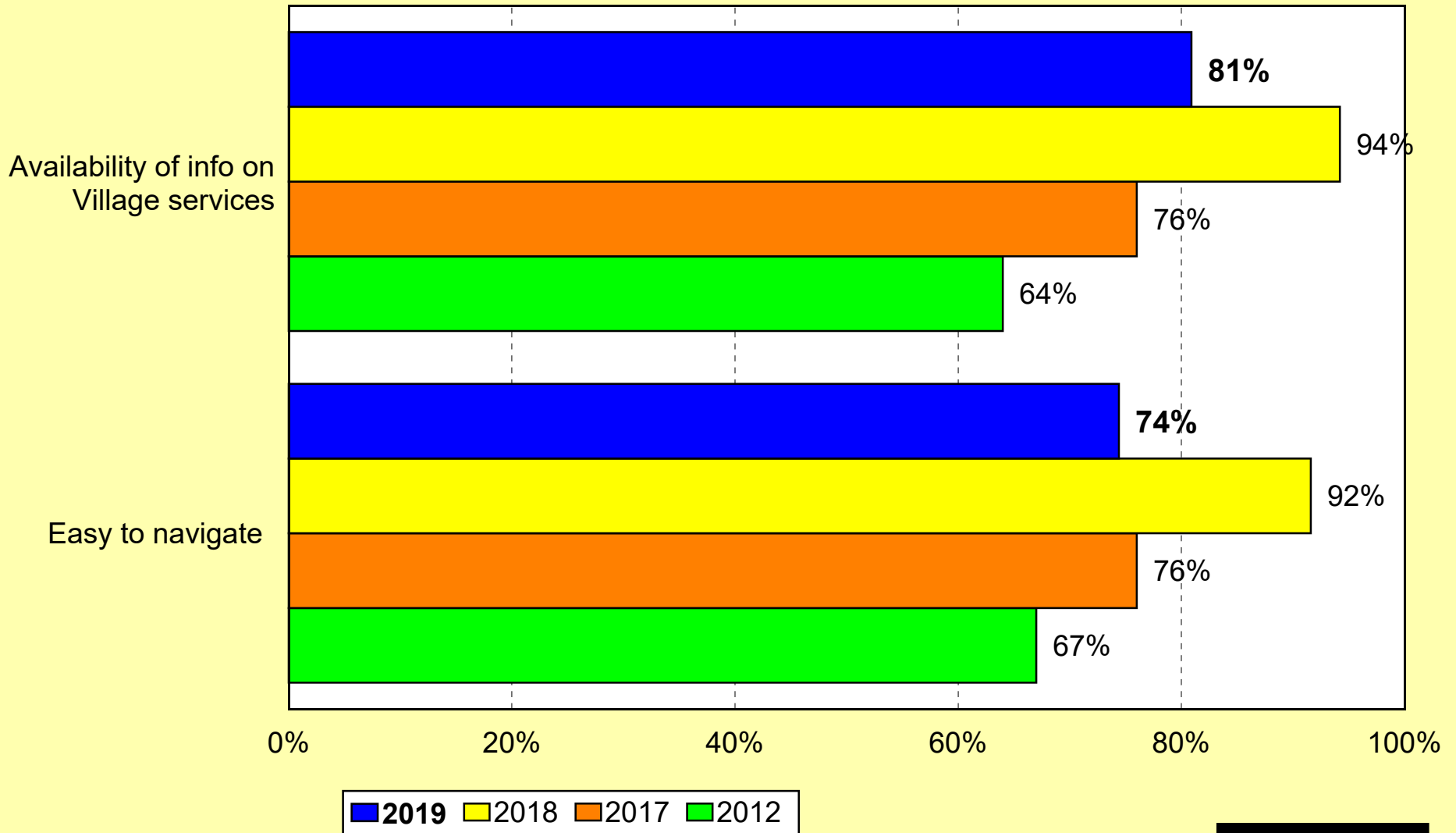
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding "don't know")



Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q11a. How would you rate the following characteristics of the Village website? - 2012 to 2019

by percentage of respondents who answered "very good" or "good"

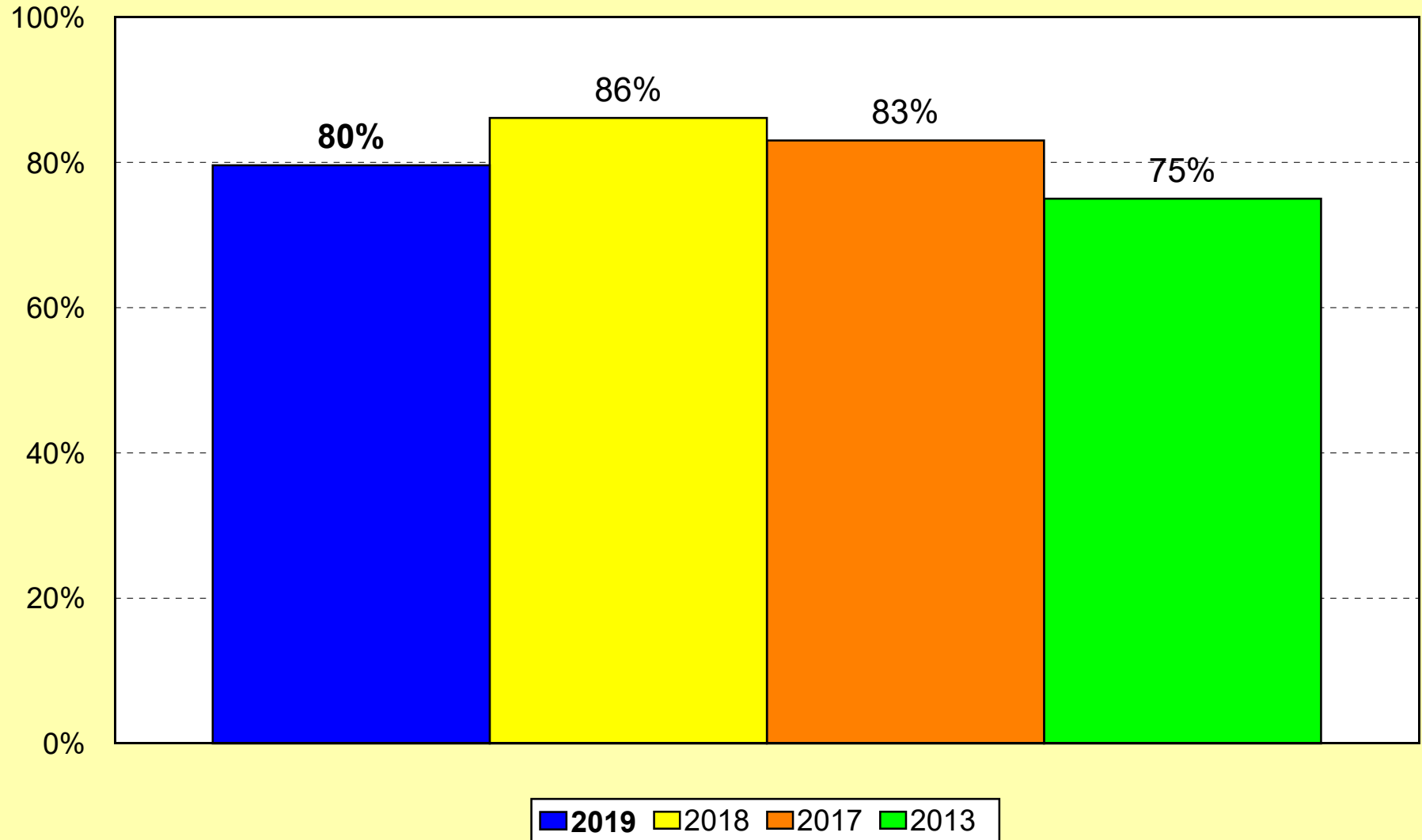


TRENDS

Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q11b. How satisfied are you with the Village's website? 2013 to 2019

by percentage of respondents who responded "very satisfied" or "satisfied"



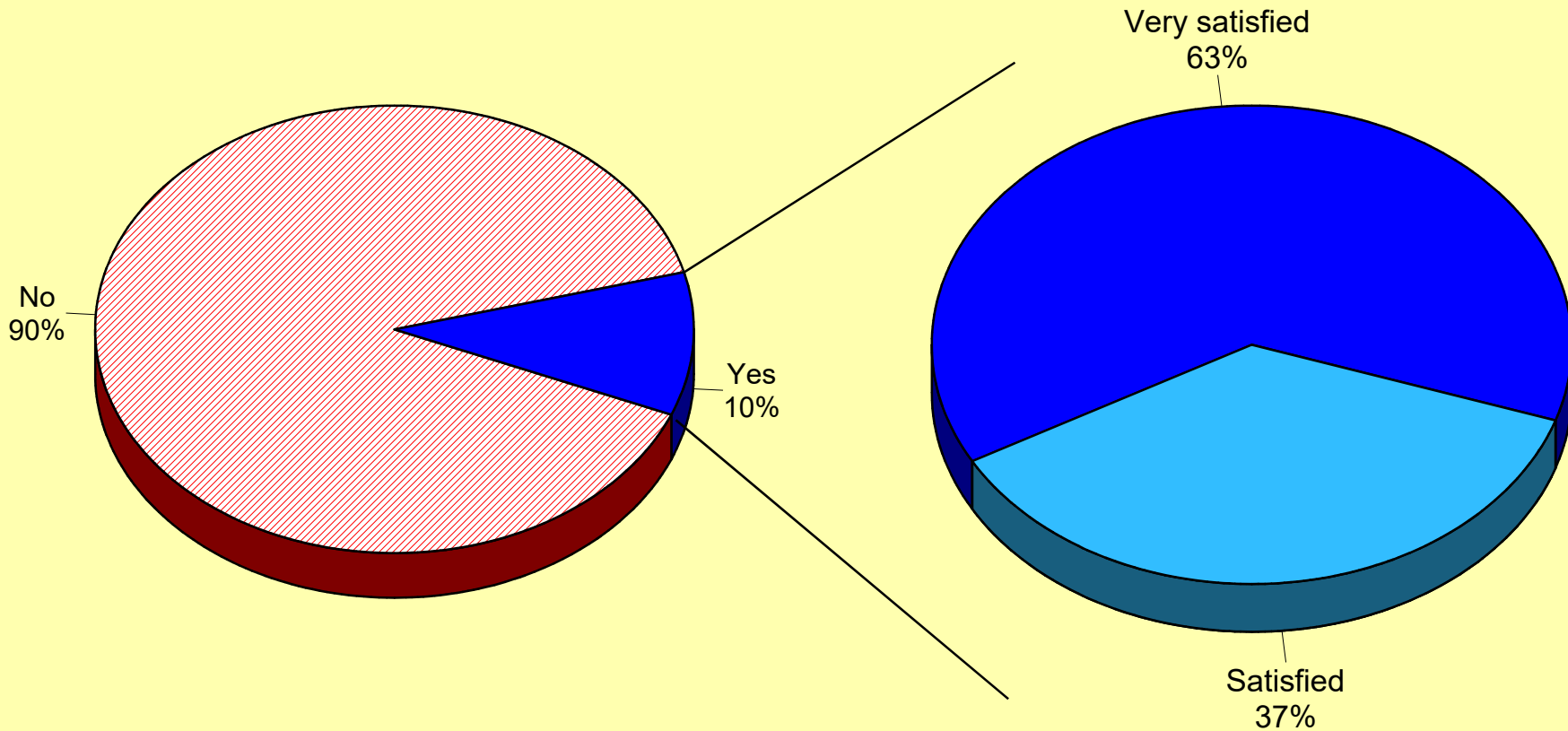
Source: ETC Institute (Pinehurst, NC Business Survey - 2019)



Q12. Have you used the Village's mobile app ("MY VOP") during the past 12 months?

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

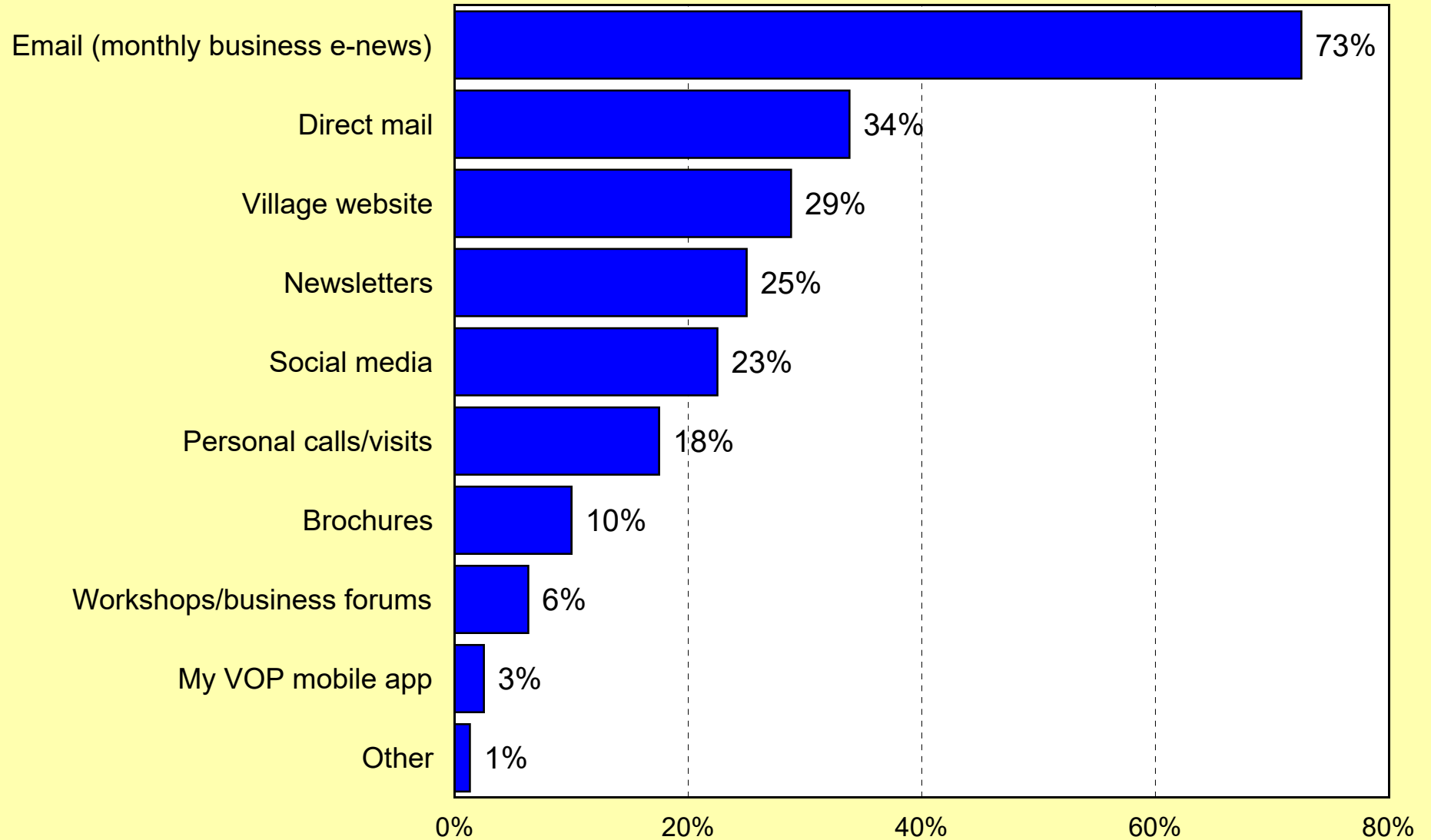
Q12a. If YES, how satisfied were you with The Village mobile app, MY VOP?



Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q13. Which of the following are the best ways for the Village to communicate important information to your business?

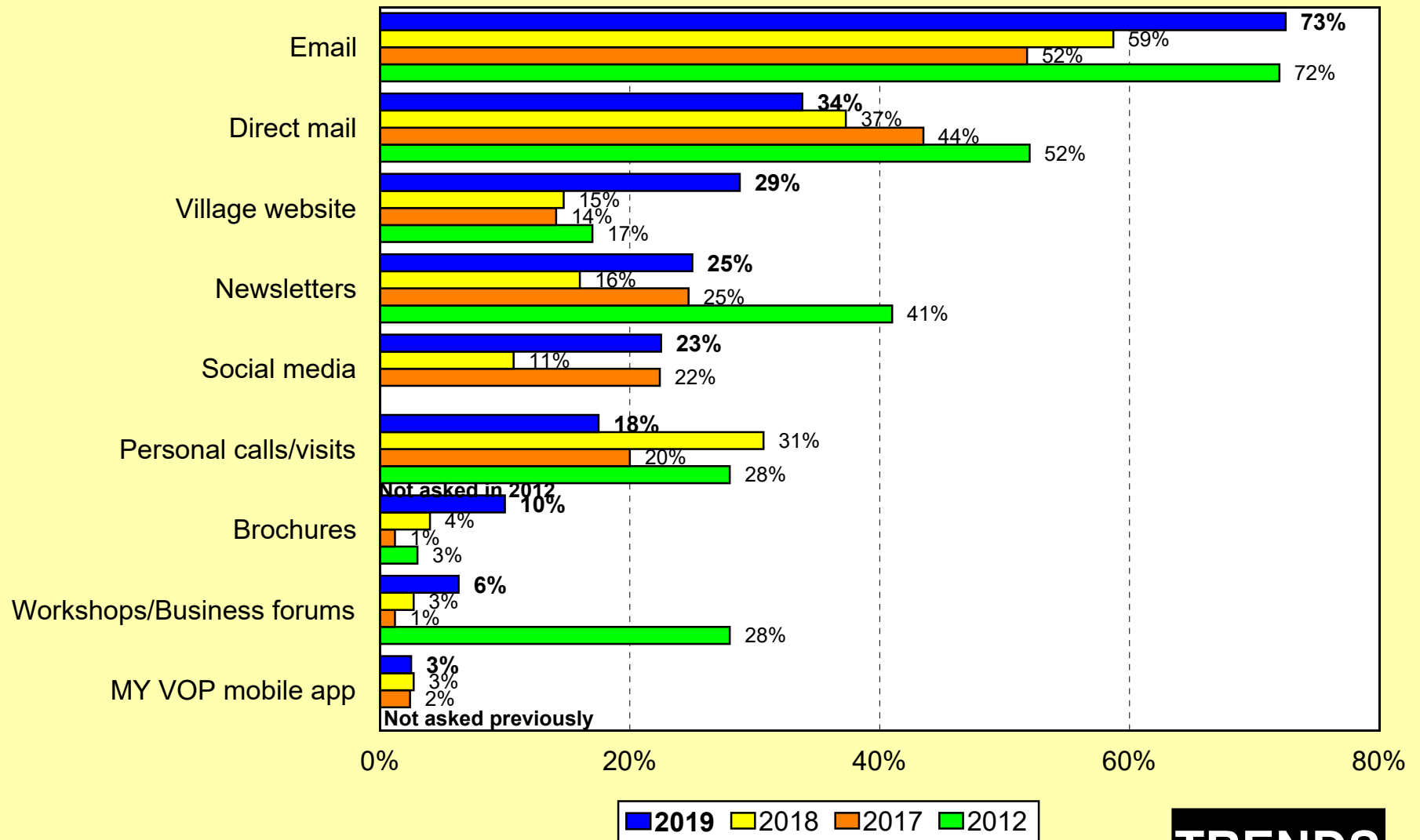
by percentage of respondents (multiple choices could be made)



Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q13. Which of the following are the best ways for the Village to communicate important information to your business? 2012 to 2019

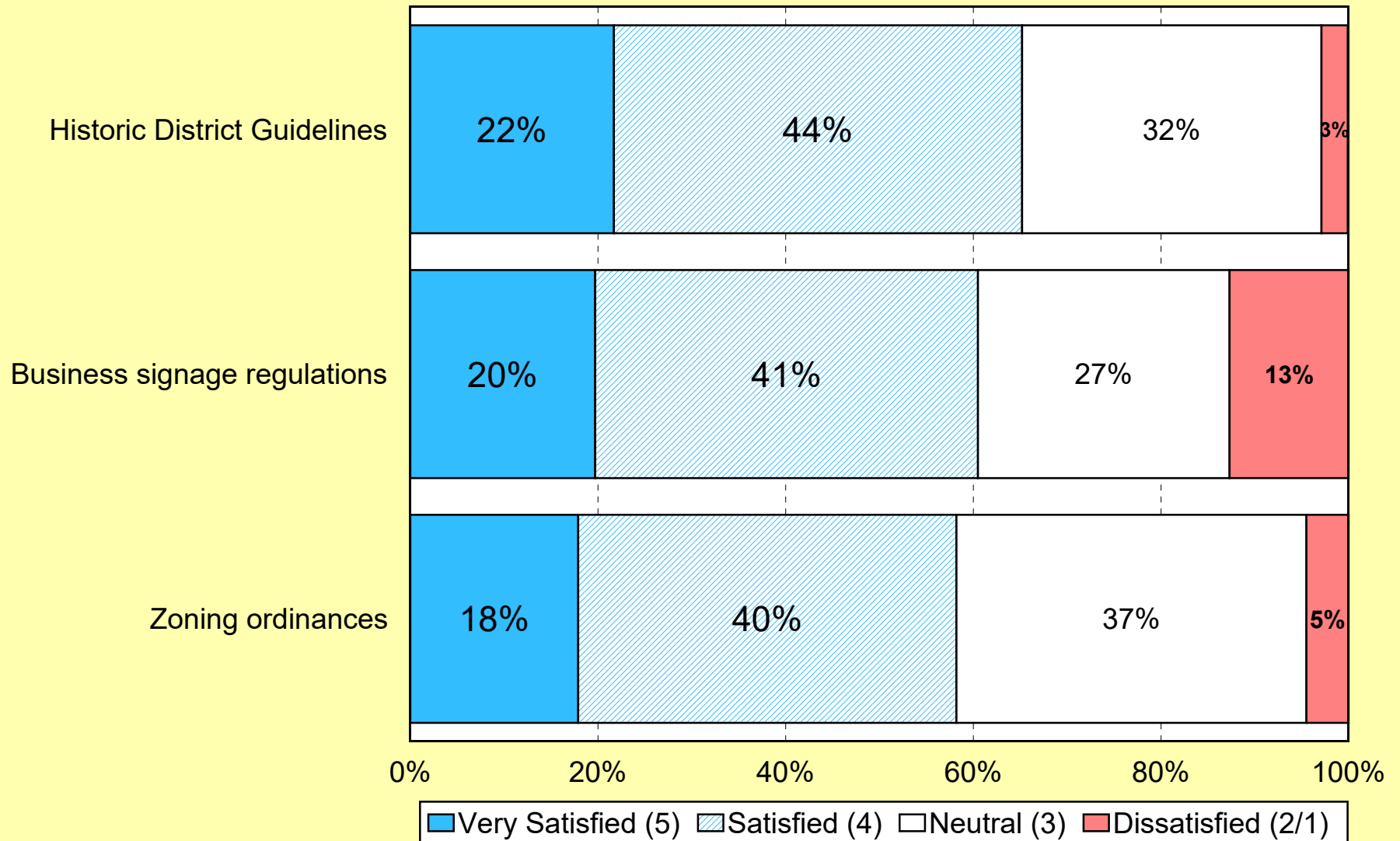
by percentage of respondents (multiple choices could be made)



Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q14. Level of Satisfaction with Community Development (Village Codes and Ordinances)

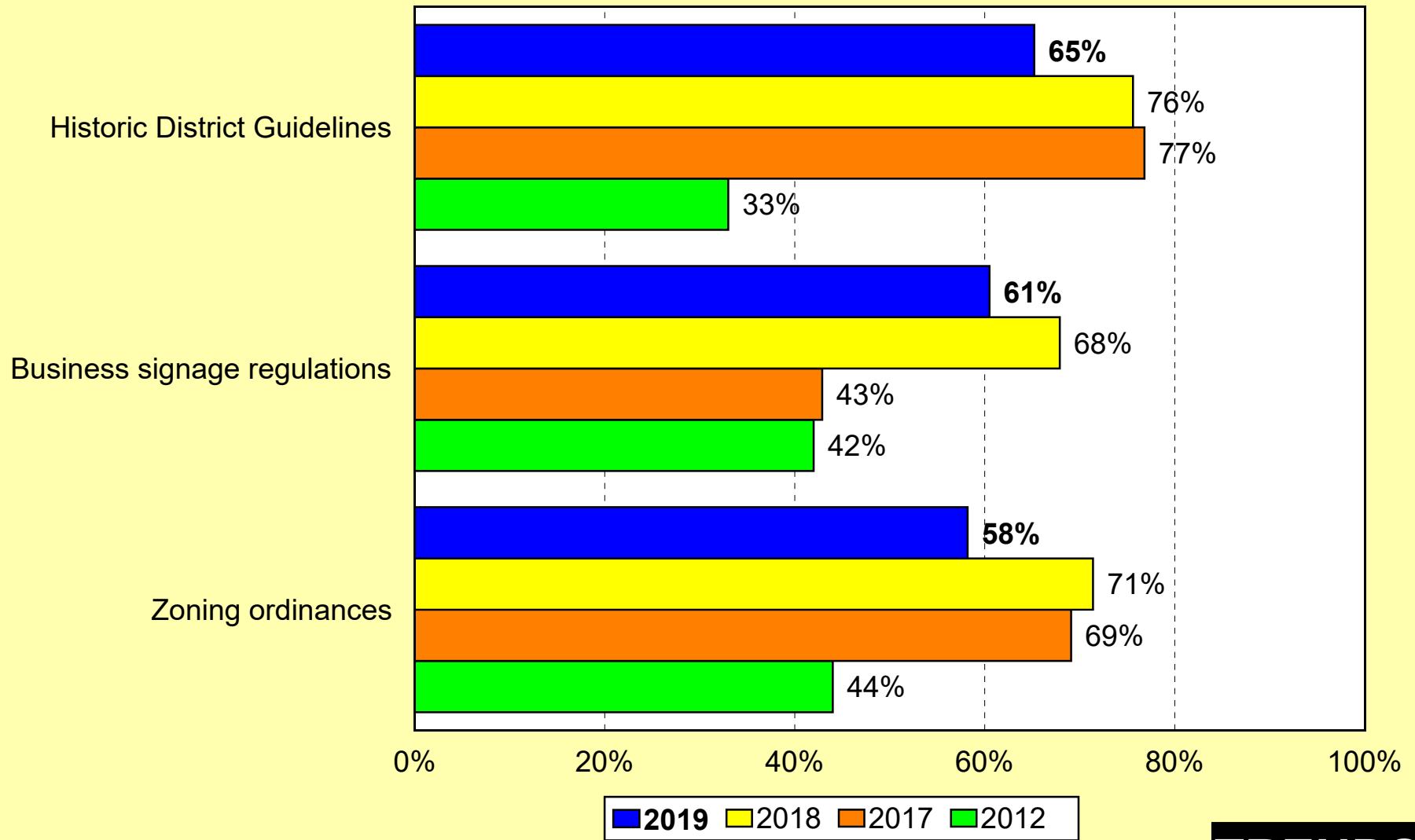
by percentage of respondents who had used the service or department and rated the item as a 1 to 5 on a 5-point scale (excluding "don't know")



Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q14. Level of Satisfaction with Community Development (Village Codes and Ordinances) - 2012 to 2019

by percentage of respondents who had used the service or department and answered "very satisfied" or "satisfied"

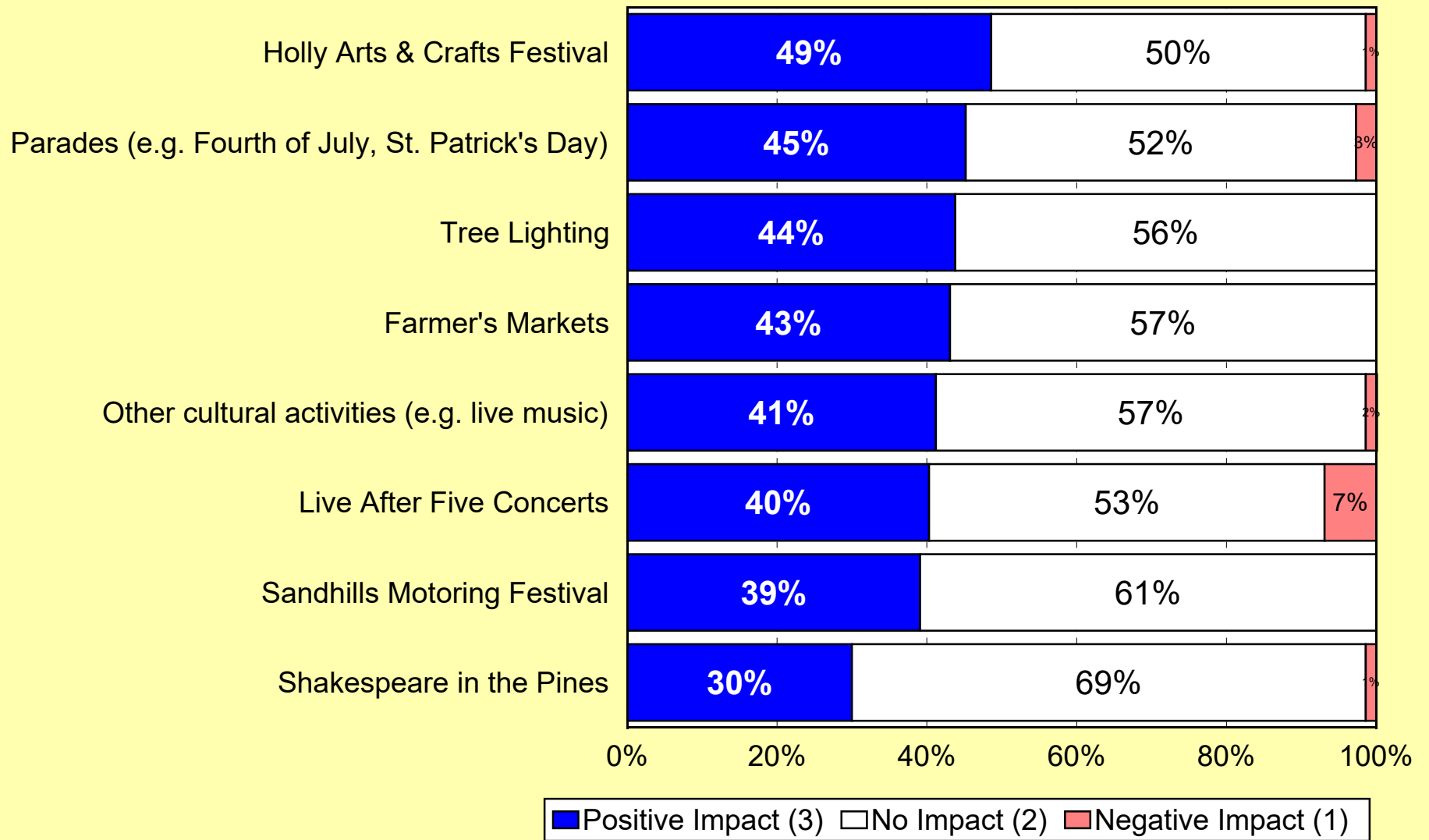


TRENDS

Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q15. How Businesses Feel About the Impact the Following Events in the Village Center Have on Their Business

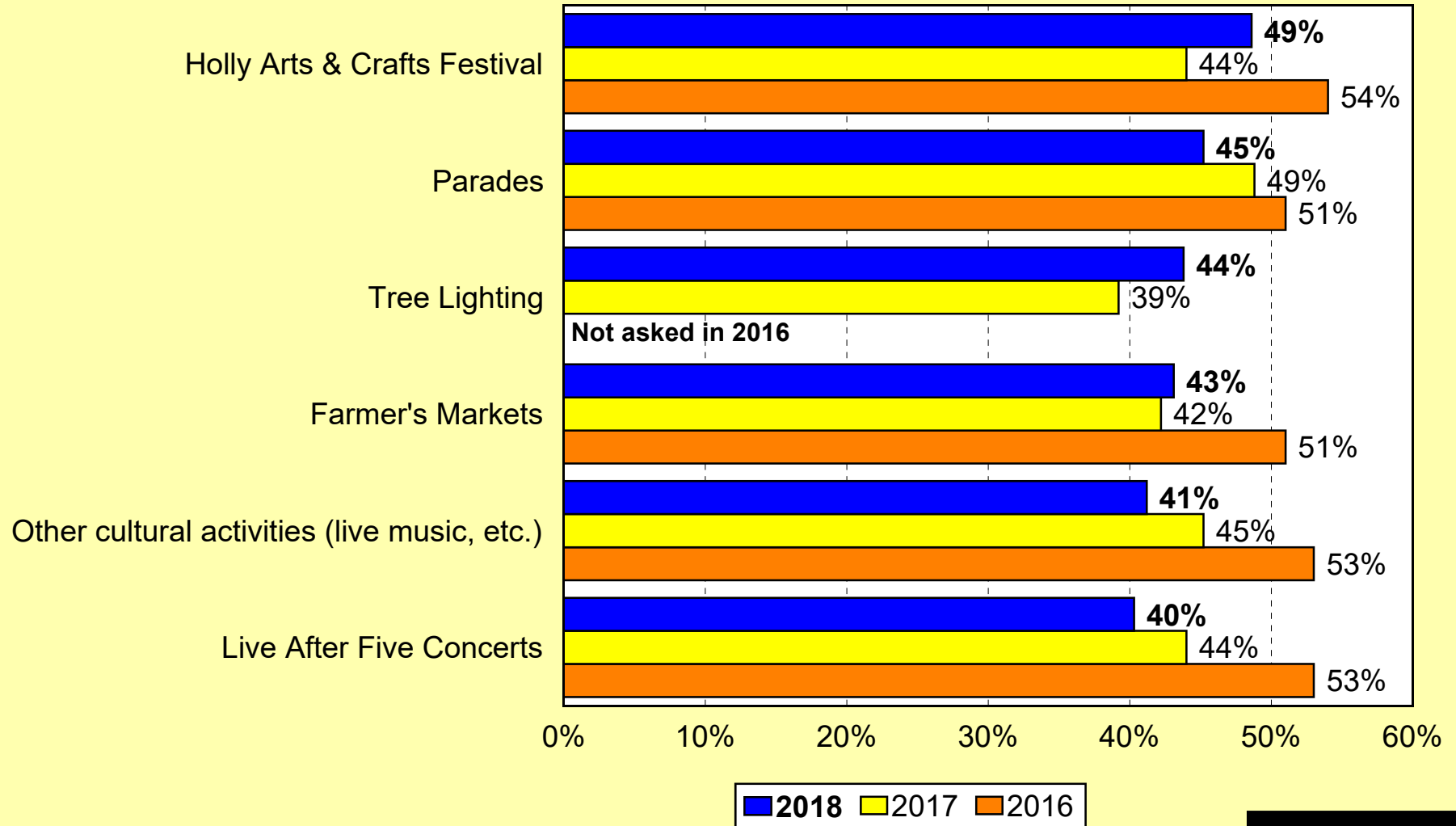
by percentage of respondents who rated the item as a 1 to 3 on a 3-point scale



Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q15. How Businesses Feel About the Impact the Following Events in the Village Center Have on Their Business 2016 to 2019

by percentage of respondents who felt the event had a "positive impact" on their business

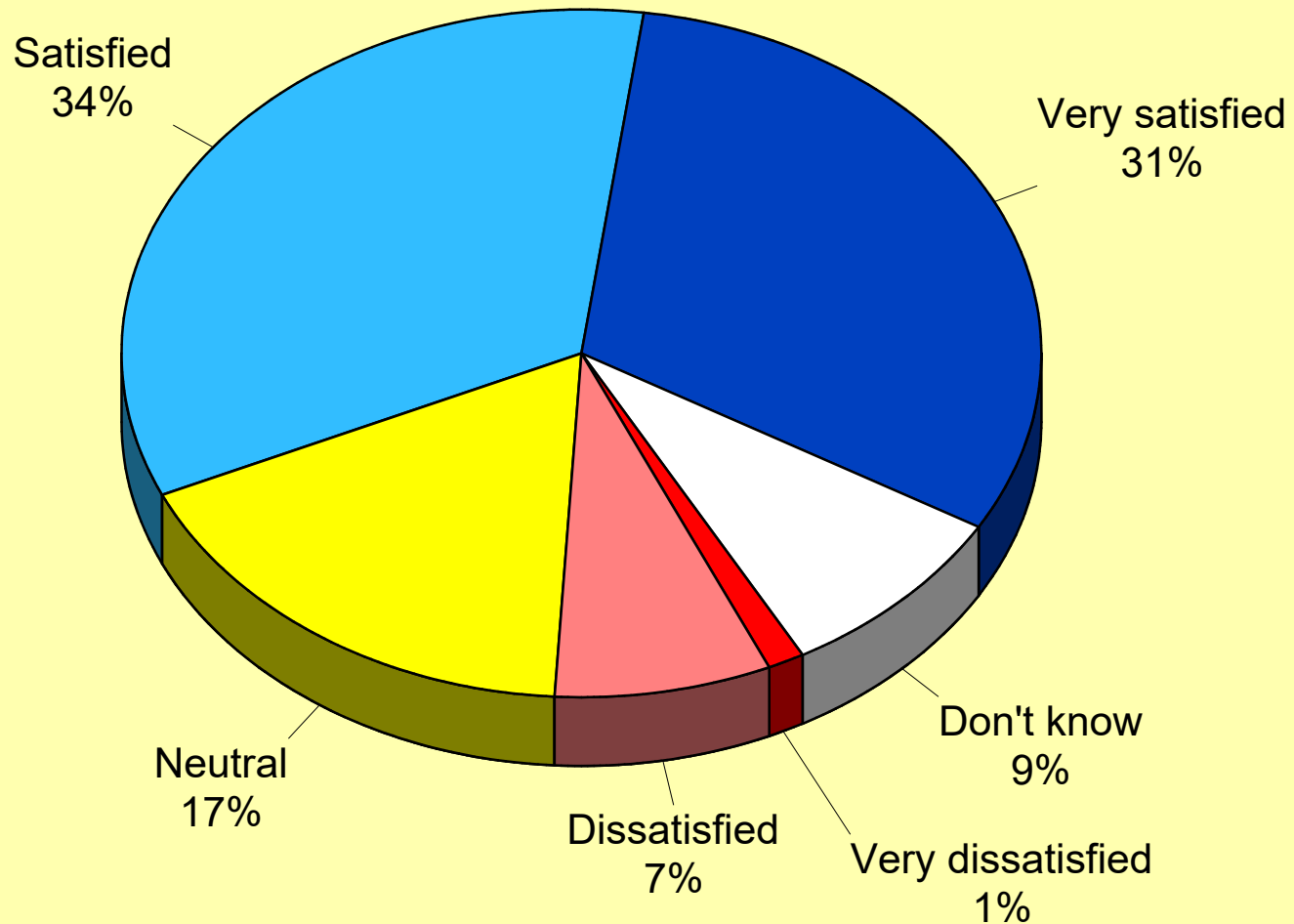


Source: ETC Institute (Pinehurst, NC Business Survey - 2019)



Q16. How satisfied are you with the way the Village handles events that attract large crowds to the Village?

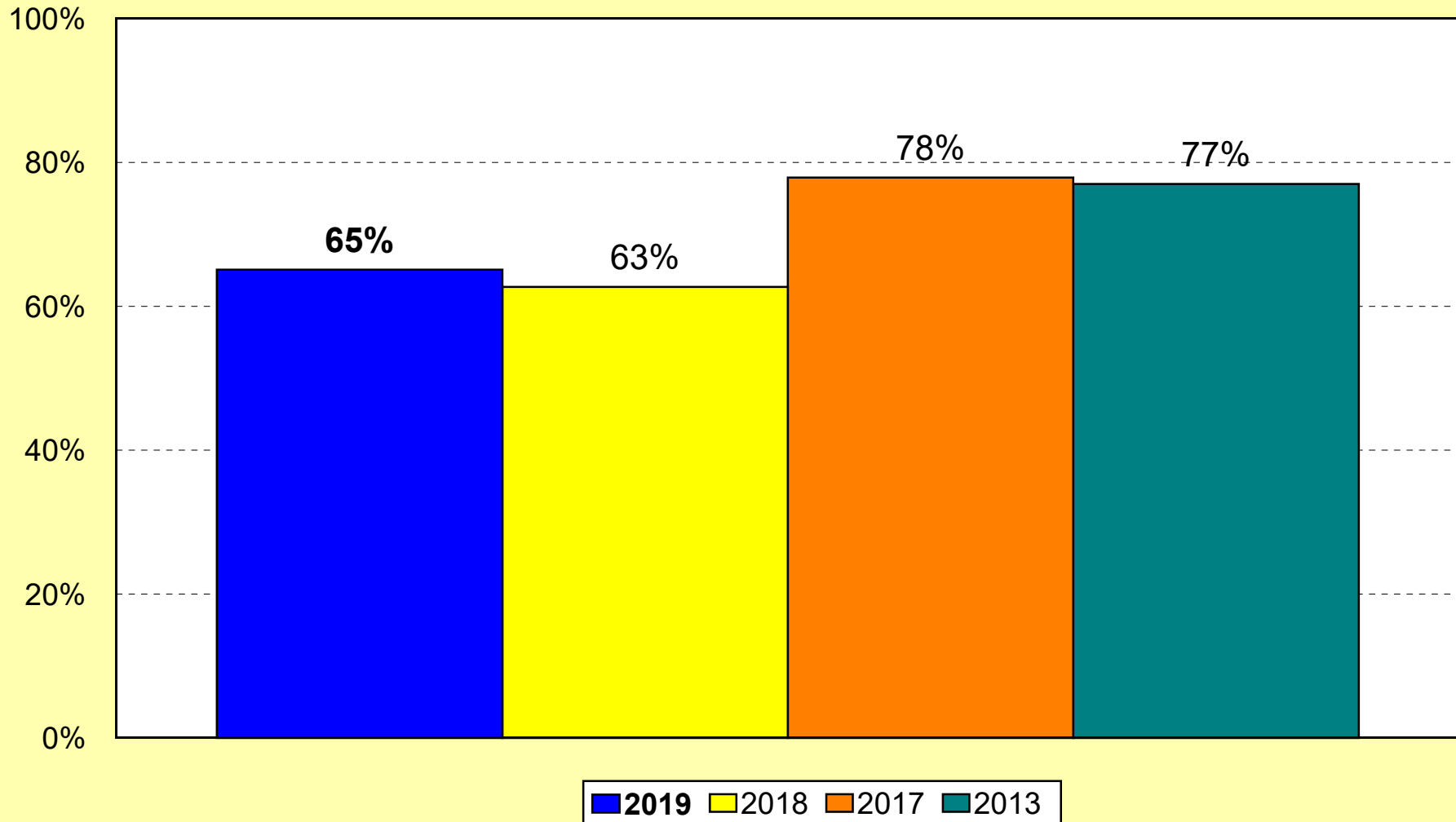
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q16. How satisfied are you with the way the Village handles events that attract large crowds to the Village? 2013 to 2019

by percentage of respondents who answered "very satisfied" or "satisfied"

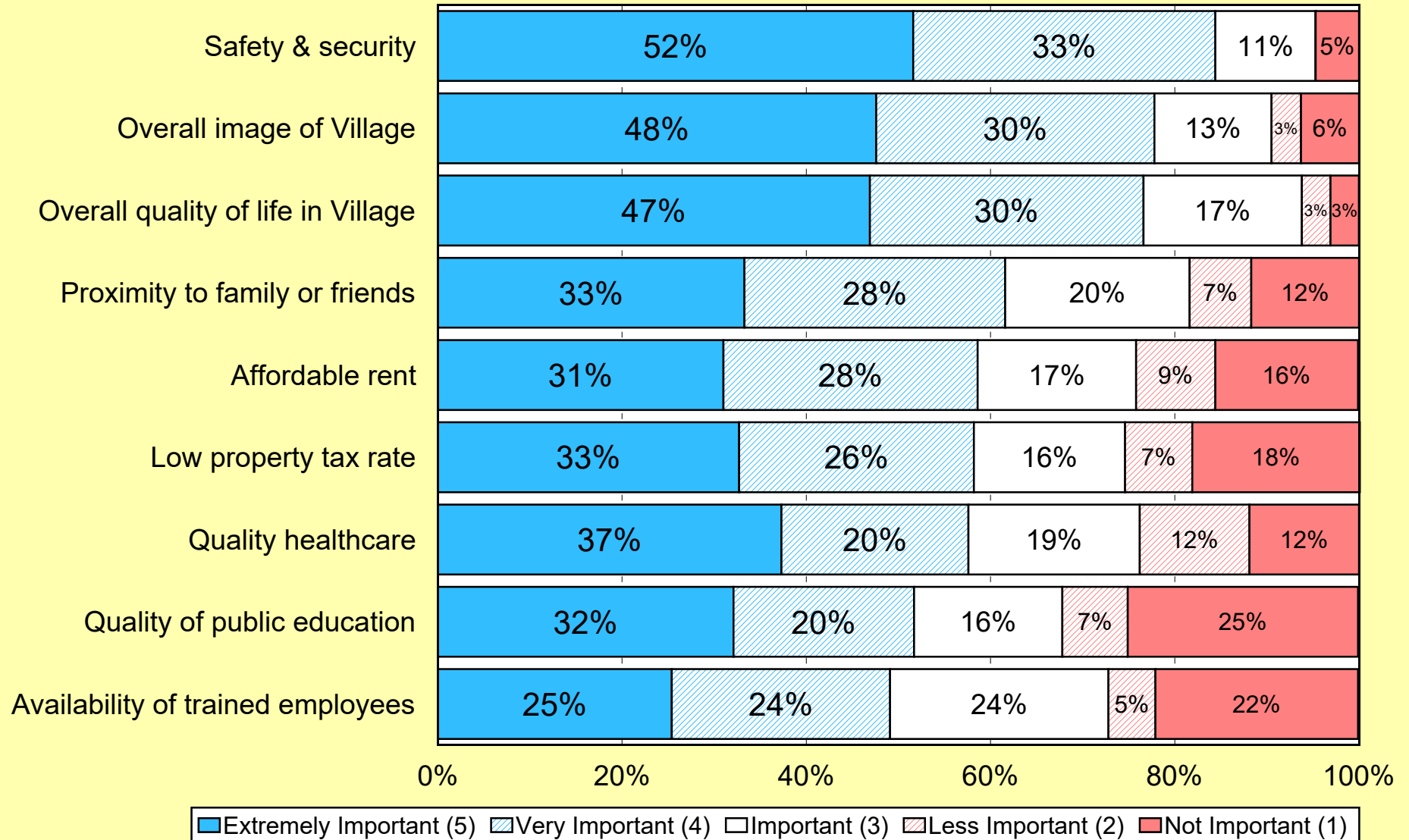


Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

TRENDS

Q17. Importance of Various Reasons in Your Decision to Locate Your Business in the Village of Pinehurst

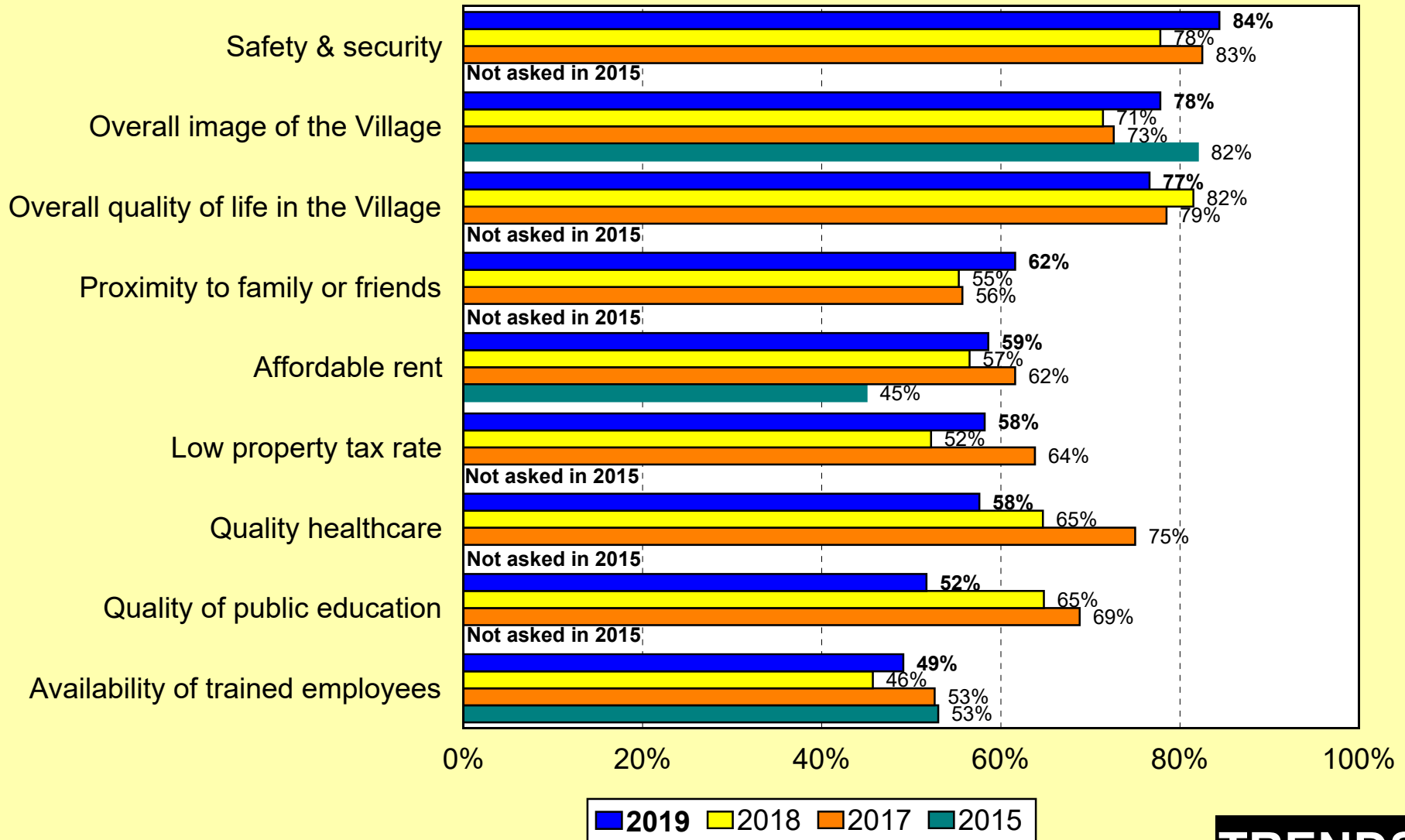
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding “not provided”)



Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q17. Importance of Various Reasons in Your Decision to Locate Your Business in the Village of Pinehurst 2015 to 2019

by percentage of respondents who felt the reason was “extremely important” or “very important”

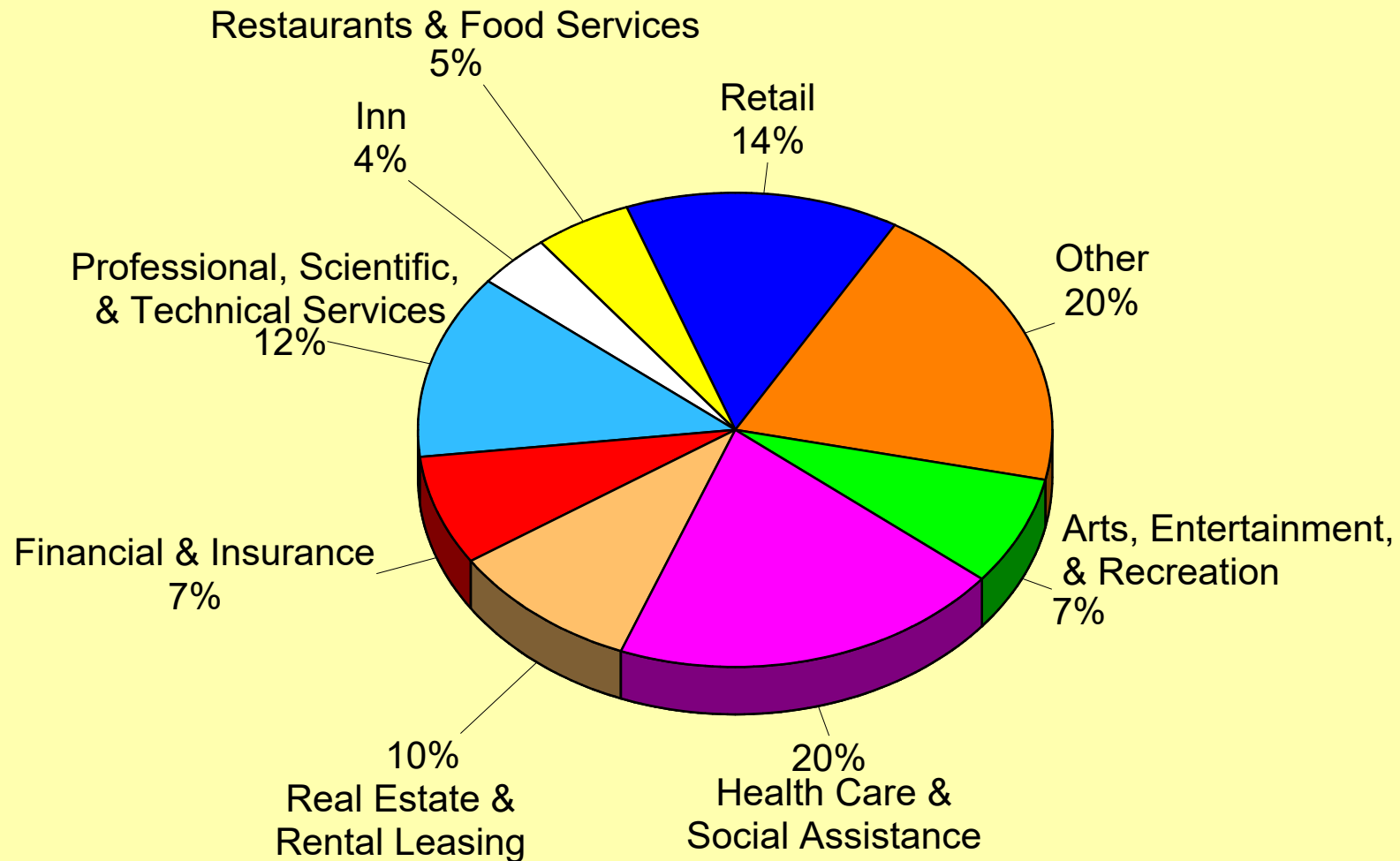


TRENDS

Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q20. Primary Business Category for Your Business

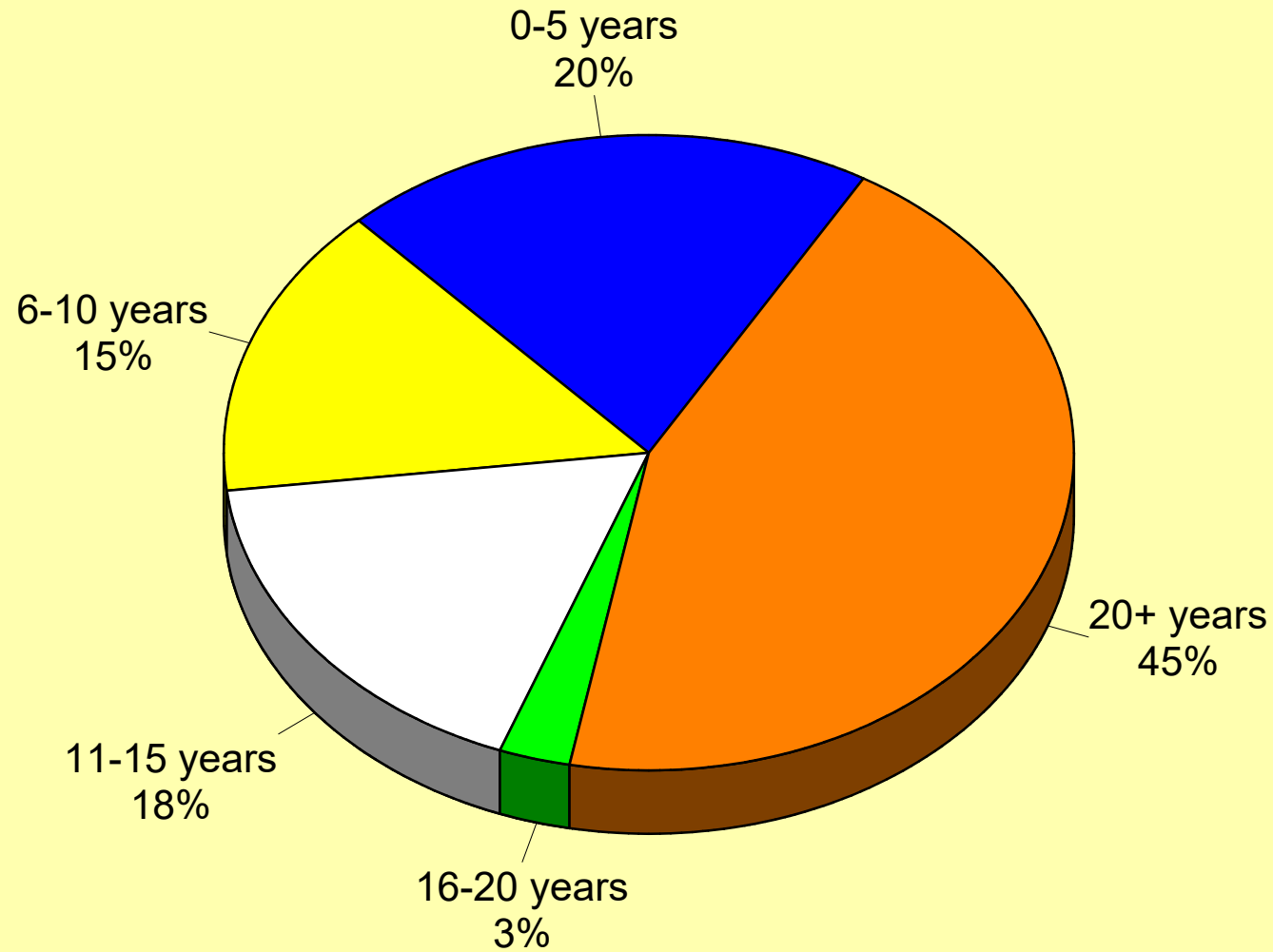
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q21. How many years have you been in operation in the Village?

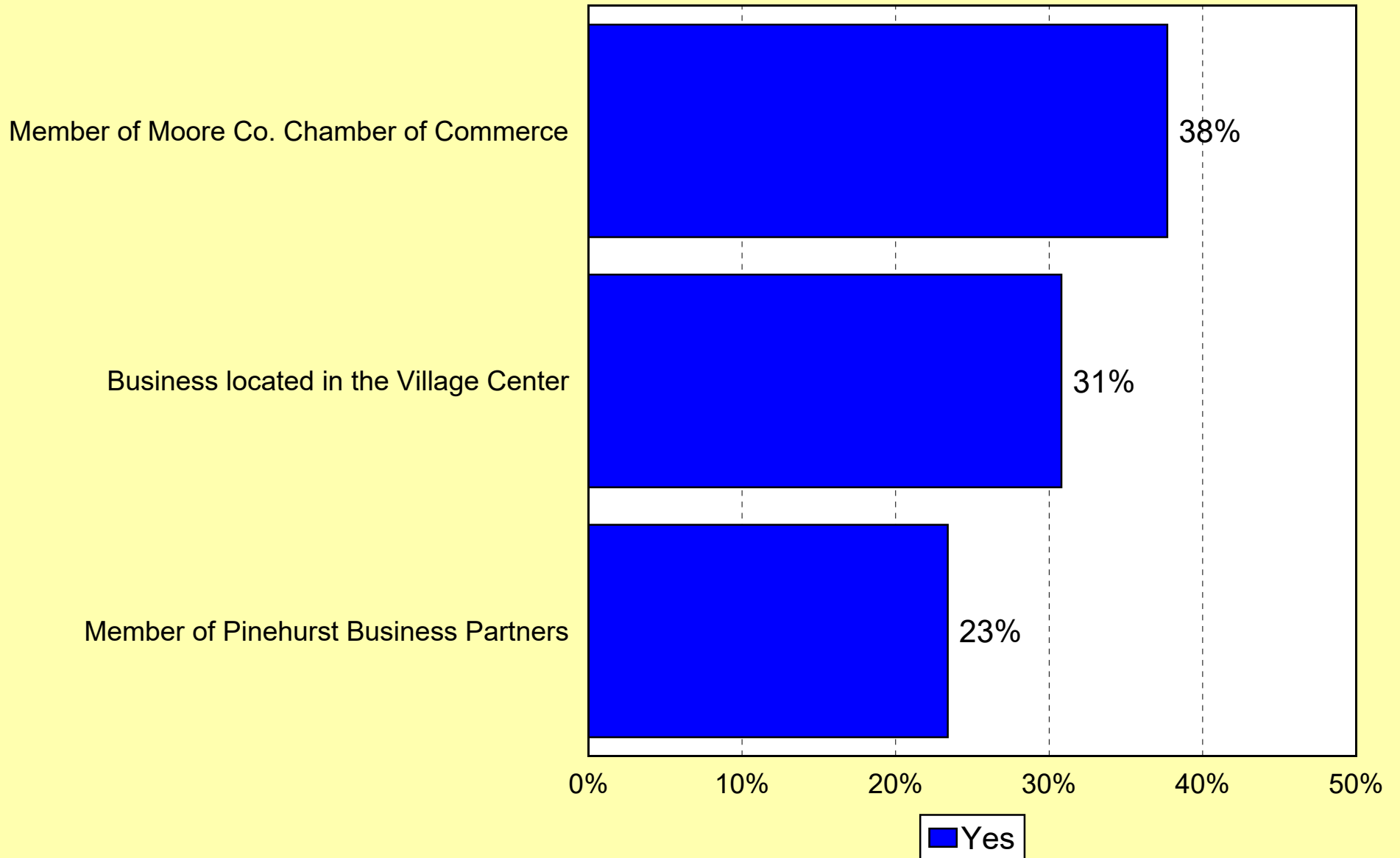
by percentage of respondents (excluding "not provided")



Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Q22. Is Your Business Any of the Following:

by percentage of respondents who answered "yes"



Source: ETC Institute (Pinehurst, NC Business Survey - 2019)

Section 2

Importance-Satisfaction Analysis

Importance-Satisfaction Analysis

Village of Pinehurst, North Carolina

Overview

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

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

Methodology

The rating is calculated by summing the percentage of responses for items selected as the first, second, and third most important services for the Village to provide. The sum is then multiplied by 1 minus the percentage of respondents who indicated they were positively satisfied with the Village's performance in the related area (the sum of the ratings of 4 and 5 on a 5-point scale excluding "Don't Know" responses). "Don't Know" responses are excluded from the calculation to ensure the satisfaction ratings among service categories are comparable. [IS=Importance x (1-Satisfaction)].

Example of the Calculation: Respondents were asked to identify the major categories of Village services they think are most important to their business. Approximately thirty-nine percent (38.8%) of respondents selected *Streets and Grounds* as one of the most important services for the Village to provide.

With regard to satisfaction, 76% of respondents surveyed rated the Village's overall performance in *Streets and Grounds* as a "4" or "5" on a 5-point scale (where "5" means "Very Satisfied") excluding "Don't Know" responses. The I-S rating for *Streets and Grounds* was calculated by multiplying the sum of the most important percentages by 1 minus the sum of the satisfaction percentages. In this example, 38.8% was multiplied by 24% (1-0.76). This yielded an I-S rating of 0.0931, which ranked first out of 9 major service categories.

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

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

- If 100% of the respondents were positively satisfied with the delivery of the service
- If none (0%) of the respondents selected the service as one for the three most important areas for the City to emphasize over the next two years.

Interpreting the Ratings

Ratings that are greater than or equal to 0.20 identify areas that should receive significantly more emphasis over the next two years. Ratings from 0.10 to 0.20 identify service areas that should receive increased emphasis. Ratings less than 0.10 should continue to receive the current level of emphasis.

- *Definitely Increase Emphasis* ($IS \geq 0.20$)
- *Increase Current Emphasis* ($0.10 \leq IS < 0.20$)
- *Maintain Current Emphasis* ($IS < 0.10$)

The results for the Village of Pinehurst are provided on the following page.

2019 Importance-Satisfaction Rating Village of Pinehurst, North Carolina Business Survey Overall Satisfaction with Village Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Medium Priority (IS <.10)						
Streets and Grounds	39%	4	76%	7	0.0931	1
Planning and Zoning	14%	7	74%	8	0.0366	2
Fire Inspections	28%	5	90%	5	0.0276	3
Building Inspections	20%	6	88%	6	0.0240	4
Code Enforcement	6%	9	63%	9	0.0239	5
Police Emergency Response	53%	1	96%	3	0.0221	6
Police Patrol	50%	2	97%	2	0.0150	7
Village Hall (General)	10%	8	92%	4	0.0081	8
Fire Emergency Response	43%	3	100%	1	0.0000	9

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

Most Important %:

The "Most Important" percentage represents the sum of the first, second, and third most important responses for each item. Respondents were asked to identify the items they thought should be the Village's top priorities.

Satisfaction %:

The "Satisfaction" percentage represents the sum of the ratings "5" and "4" excluding 'don't knows.' Respondents ranked their level of satisfaction with each of the items on a scale of 5 to 1 with "5" being Very Satisfied and "1" being Very Dissatisfied.

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Importance-Satisfaction Matrix Analysis

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

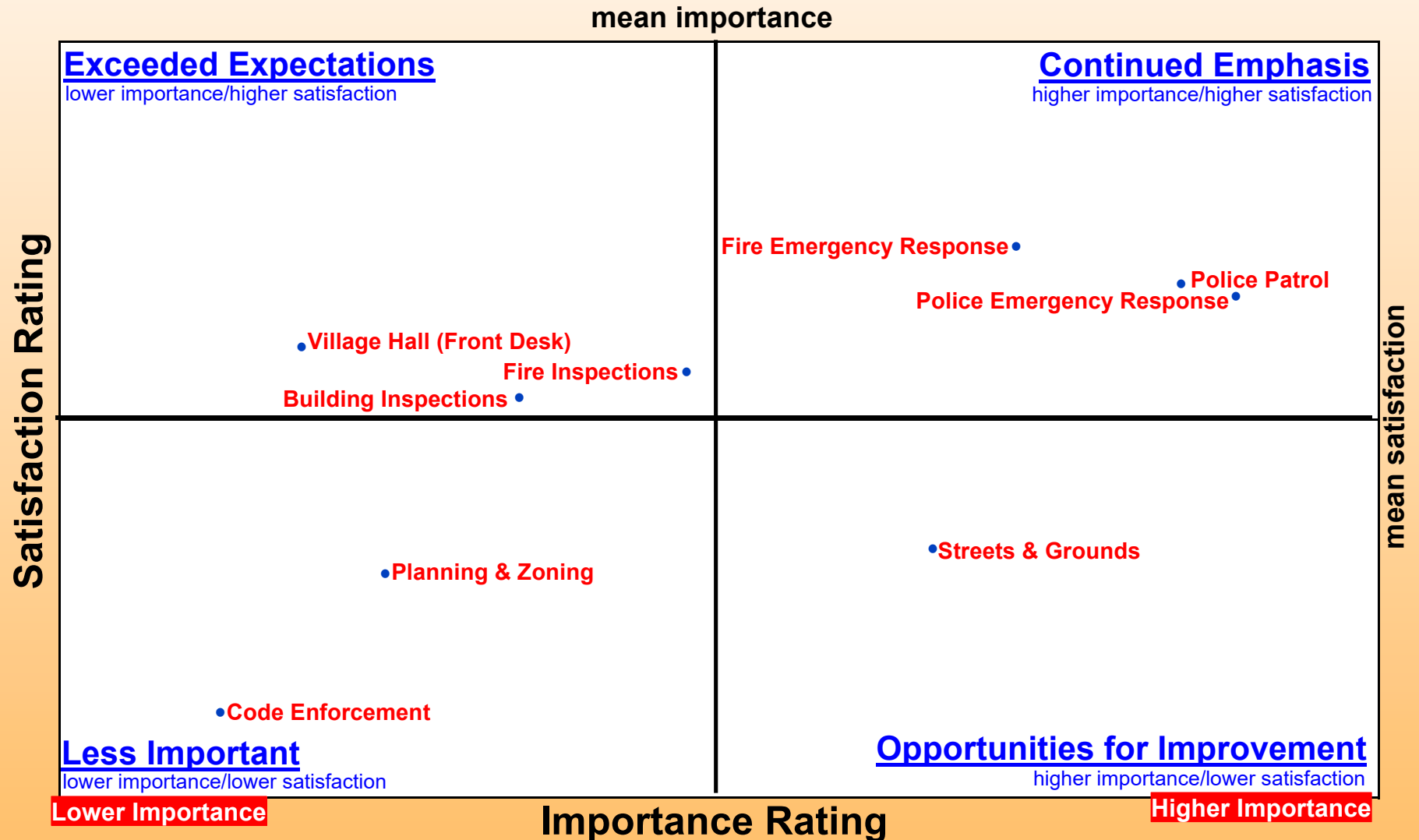
- **Continued Emphasis (above average importance and above average satisfaction).** This area shows where the Village is meeting customer expectations. Items in this area have a significant impact on the customer's overall level of satisfaction. The Village should maintain (or slightly increase) emphasis on items in this area.
- **Exceeding Expectations (below average importance and above average satisfaction).** This area shows where the Village is performing significantly better than customers expect the Village to perform. Items in this area do not significantly affect the overall level of satisfaction that residents have with Village services. The Village should maintain (or slightly decrease) emphasis on items in this area.
- **Opportunities for Improvement (above average importance and below average satisfaction).** This area shows where the Village is not performing as well as customers expect the Village to perform. This area has a significant impact on customer satisfaction, and the Village should DEFINITELY increase emphasis on items in this area.
- **Less Important (below average importance and below average satisfaction).** This area shows where the Village is not performing well relative to the Village's performance in other areas; however, this area is generally considered to be less important to residents. This area does not significantly affect overall satisfaction with Village services because the items are less important to residents. The agency should maintain current levels of emphasis on items in this area.

The matrix for the Village of Pinehurst is provided on the following page.

2019 Village of Pinehurst Business Survey Importance-Satisfaction Assessment Matrix

-Overall-

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



Source: ETC Institute (2019)

Section 3

Tabular Data

Q1. Community Service Satisfaction. Please indicate if your business has used each of the services or departments listed below in the past year.

(N=80)

	Yes	No
Q1-1. Building Inspections	32.5%	67.5%
Q1-2. Fire Inspections	65.0%	35.0%
Q1-3. Planning & Zoning	25.0%	75.0%
Q1-4. Code Enforcement	20.0%	80.0%
Q1-5. Police Patrol	42.5%	57.5%
Q1-6. Police Emergency Response	30.0%	70.0%
Q1-7. Fire Emergency Response	17.5%	82.5%
Q1-8. Village Hall (Front Desk)	31.3%	68.8%
Q1-9. Streets & Grounds	32.5%	67.5%

Q1. If "YES," please rate the service or department using a scale of 1 to 5, where 5 means "very satisfied" and 1 means "very dissatisfied."

(N=67)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q1-1. Building Inspections	44.0%	44.0%	12.0%	0.0%	0.0%	0.0%
Q1-2. Fire Inspections	58.0%	32.0%	8.0%	2.0%	0.0%	0.0%
Q1-3. Planning & Zoning	25.0%	45.0%	15.0%	5.0%	5.0%	5.0%
Q1-4. Code Enforcement	43.8%	18.8%	31.3%	6.3%	0.0%	0.0%
Q1-5. Police Patrol	73.5%	23.5%	0.0%	0.0%	2.9%	0.0%
Q1-6. Police Emergency Response	83.3%	12.5%	0.0%	0.0%	4.2%	0.0%
Q1-7. Fire Emergency Response	92.3%	7.7%	0.0%	0.0%	0.0%	0.0%
Q1-8. Village Hall (Front Desk)	76.0%	16.0%	8.0%	0.0%	0.0%	0.0%
Q1-9. Streets & Grounds	44.0%	32.0%	16.0%	4.0%	4.0%	0.0%

WITHOUT "DON'T KNOW"

Q1. If "YES," please rate the service or department using a scale of 1 to 5, where 5 means "very satisfied" and 1 means "very dissatisfied." (without "don't know")

(N=67)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q1-1. Building Inspections	44.0%	44.0%	12.0%	0.0%	0.0%
Q1-2. Fire Inspections	58.0%	32.0%	8.0%	2.0%	0.0%
Q1-3. Planning & Zoning	26.3%	47.4%	15.8%	5.3%	5.3%
Q1-4. Code Enforcement	43.8%	18.8%	31.3%	6.3%	0.0%
Q1-5. Police Patrol	73.5%	23.5%	0.0%	0.0%	2.9%
Q1-6. Police Emergency Response	83.3%	12.5%	0.0%	0.0%	4.2%
Q1-7. Fire Emergency Response	92.3%	7.7%	0.0%	0.0%	0.0%
Q1-8. Village Hall (Front Desk)	76.0%	16.0%	8.0%	0.0%	0.0%
Q1-9. Streets & Grounds	44.0%	32.0%	16.0%	4.0%	4.0%

Q2. Which THREE of the Village services or departments listed in Question 1 are the MOST IMPORTANT to your business?

Q2. Top choice	Number	Percent
Building Inspections	6	7.5 %
Fire Inspections	4	5.0 %
Planning & Zoning	7	8.8 %
Code Enforcement	1	1.3 %
Police Patrol	21	26.3 %
Police Emergency Response	17	21.3 %
Fire Emergency Response	8	10.0 %
Village Hall (Front Desk)	2	2.5 %
Streets & Grounds	6	7.5 %
None chosen	8	10.0 %
Total	80	100.0 %

Q2. Which THREE of the Village services or departments listed in Question 1 are the MOST IMPORTANT to your business?

Q2. 2nd choice	Number	Percent
Building Inspections	4	5.0 %
Fire Inspections	13	16.3 %
Planning & Zoning	1	1.3 %
Code Enforcement	1	1.3 %
Police Patrol	7	8.8 %
Police Emergency Response	16	20.0 %
Fire Emergency Response	17	21.3 %
Village Hall (Front Desk)	1	1.3 %
Streets & Grounds	12	15.0 %
None chosen	8	10.0 %
Total	80	100.0 %

Q2. Which THREE of the Village services or departments listed in Question 1 are the MOST IMPORTANT to your business?

Q2. 3rd choice	Number	Percent
Building Inspections	6	7.5 %
Fire Inspections	5	6.3 %
Planning & Zoning	3	3.8 %
Code Enforcement	3	3.8 %
Police Patrol	12	15.0 %
Police Emergency Response	9	11.3 %
Fire Emergency Response	9	11.3 %
Village Hall (Front Desk)	5	6.3 %
Streets & Grounds	13	16.3 %
None chosen	15	18.8 %
Total	80	100.0 %

SUM OF TOP 3 CHOICES

Q2. Which THREE of the Village services or departments listed in Question 1 are the MOST IMPORTANT to your business? (top 3)

Q2. Sum of top 3 choices	Number	Percent
Building Inspections	16	20.0 %
Fire Inspections	22	27.5 %
Planning & Zoning	11	13.8 %
Code Enforcement	5	6.3 %
Police Patrol	40	50.0 %
Police Emergency Response	42	52.5 %
Fire Emergency Response	34	42.5 %
Village Hall (Front Desk)	8	10.0 %
Streets & Grounds	31	38.8 %
None chosen	8	10.0 %
Total	217	

Q3. In general, how satisfied are you with the overall quality of services provided to your business by the Village of Pinehurst? Would you say the quality of services provided is...

Q3. How satisfied are you with overall quality of services provided by Village of Pinehurst	Number	Percent
Significantly higher than your expectations	12	15.0 %
Higher than your expectations	14	17.5 %
Meets your expectations	40	50.0 %
Below your expectations	4	5.0 %
Significantly below your expectations	2	2.5 %
Don't know	8	10.0 %
Total	80	100.0 %

WITHOUT "DON'T KNOW"

Q3. In general, how satisfied are you with the overall quality of services provided to your business by the Village of Pinehurst? Would you say the quality of services provided is... (without "don't know")

Q3. How satisfied are you with overall quality of services provided by Village of Pinehurst	Number	Percent
Significantly higher than your expectations	12	16.7 %
Higher than your expectations	14	19.4 %
Meets your expectations	40	55.6 %
Below your expectations	4	5.6 %
Significantly below your expectations	2	2.8 %
Total	72	100.0 %

Q4. Using a scale of 1 to 5, where 5 means "very satisfied" and 1 means "very dissatisfied," please indicate how satisfied your business is with the Village in the following areas.

(N=80)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q4-1. Supporting business growth & development	20.0%	31.3%	32.5%	2.5%	8.8%	5.0%
Q4-2. Availability of employee & customer parking around your business	20.0%	31.3%	18.8%	7.5%	8.8%	13.8%
Q4-3. Condition of sidewalks	25.0%	43.8%	10.0%	6.3%	2.5%	12.5%
Q4-4. Creating & promoting special events	25.0%	46.3%	18.8%	0.0%	2.5%	7.5%
Q4-5. Historic preservation efforts	22.5%	38.8%	30.0%	0.0%	0.0%	8.8%
Q4-6. Cleanliness of Village streets & public areas	37.5%	46.3%	5.0%	2.5%	1.3%	7.5%
Q4-7. Landscape maintenance in right of ways & public areas	40.0%	41.3%	6.3%	2.5%	0.0%	10.0%

WITHOUT "DON'T KNOW"

Q4. Using a scale of 1 to 5, where 5 means "very satisfied" and 1 means "very dissatisfied," please indicate how satisfied your business is with the Village in the following areas. (without "don't know")

(N=80)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q4-1. Supporting business growth & development	21.1%	32.9%	34.2%	2.6%	9.2%
Q4-2. Availability of employee & customer parking around your business	23.2%	36.2%	21.7%	8.7%	10.1%
Q4-3. Condition of sidewalks	28.6%	50.0%	11.4%	7.1%	2.9%
Q4-4. Creating & promoting special events	27.0%	50.0%	20.3%	0.0%	2.7%
Q4-5. Historic preservation efforts	24.7%	42.5%	32.9%	0.0%	0.0%
Q4-6. Cleanliness of Village streets & public areas	40.5%	50.0%	5.4%	2.7%	1.4%
Q4-7. Landscape maintenance in right of ways & public areas	44.4%	45.8%	6.9%	2.8%	0.0%

Q5. Perceptions of the Village. Several items that may influence your business's perception of the Village of Pinehurst are listed below. Please rate each item using a scale of 1 to 5, where 5 means "very satisfied" and 1 means "very dissatisfied."

(N=80)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q5-1. Overall image of Village	43.8%	42.5%	10.0%	1.3%	1.3%	1.3%
Q5-2. Overall quality of life	48.8%	37.5%	11.3%	0.0%	0.0%	2.5%
Q5-3. Overall feeling of safety	53.8%	43.8%	0.0%	0.0%	1.3%	1.3%

WITHOUT "DON'T KNOW"

Q5. Perceptions of the Village. Several items that may influence your business's perception of the Village of Pinehurst are listed below. Please rate each item using a scale of 1 to 5, where 5 means "very satisfied" and 1 means "very dissatisfied." (without "don't know")

(N=80)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q5-1. Overall image of Village	44.3%	43.0%	10.1%	1.3%	1.3%
Q5-2. Overall quality of life	50.0%	38.5%	11.5%	0.0%	0.0%
Q5-3. Overall feeling of safety	54.4%	44.3%	0.0%	0.0%	1.3%

Q6. Thinking generally about the Village of Pinehurst, how likely would you be to recommend the Village as a business location to friends, family, and co-workers?

Q6. How likely would you be to recommend Village as a business location to friends, family, & co-workers	Number	Percent
Very likely	33	41.3 %
Likely	20	25.0 %
Somewhat likely	18	22.5 %
Not likely	3	3.8 %
Not likely at all	2	2.5 %
Don't know	4	5.0 %
Total	80	100.0 %

WITHOUT "DON'T KNOW"

Q6. Thinking generally about the Village of Pinehurst, how likely would you be to recommend the Village as a business location to friends, family, and co-workers? (without "don't know")

Q6. How likely would you be to recommend Village as a business location to friends, family, & co-workers	Number	Percent
Very likely	33	43.4 %
Likely	20	26.3 %
Somewhat likely	18	23.7 %
Not likely	3	3.9 %
Not likely at all	2	2.6 %
Total	76	100.0 %

Q7. Which of the following best describes the overall business atmosphere in the Village of Pinehurst today, compared to two years ago?

Q7. What is overall business atmosphere in Village of Pinehurst today compared to two years ago

	Number	Percent
Better	26	32.5 %
No change, but good	34	42.5 %
No change, but poor	2	2.5 %
Worse	6	7.5 %
Don't know	12	15.0 %
Total	80	100.0 %

WITHOUT "DON'T KNOW"

Q7. Which of the following best describes the overall business atmosphere in the Village of Pinehurst today, compared to two years ago? (without "don't know")

Q7. What is overall business atmosphere in Village of Pinehurst today compared to two years ago

	Number	Percent
Better	26	38.2 %
No change, but good	34	50.0 %
No change, but poor	2	2.9 %
Worse	6	8.8 %
Total	68	100.0 %

Q8. Customer Service. Overall, how would you rate the Village of Pinehurst customer service? Would you say it is...

Q8. How would you rate Village of Pinehurst customer service	Number	Percent
Very good	26	32.5 %
Good	38	47.5 %
Poor	2	2.5 %
Don't know	14	17.5 %
Total	80	100.0 %

WITHOUT "DON'T KNOW"

Q8. Customer Service. Overall, how would you rate the Village of Pinehurst customer service? Would you say it is... (without "don't know")

Q8. How would you rate Village of Pinehurst customer service	Number	Percent
Very good	26	39.4 %
Good	38	57.6 %
Poor	2	3.0 %
Total	66	100.0 %

Q9. Thinking about your MOST RECENT contact with Village government staff, please rate your experience using a scale of 1 to 5, where 5 means "strongly agree" and 1 means "strongly disagree."

(N=80)

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Don't know
Q9-1. Village staff was responsive to my needs	33.8%	27.5%	12.5%	1.3%	1.3%	23.8%
Q9-2. Village staff was competent	35.0%	28.8%	8.8%	1.3%	1.3%	25.0%
Q9-3. Village staff was courteous	41.3%	25.0%	8.8%	1.3%	0.0%	23.8%
Q9-4. My issue was resolved promptly	23.8%	28.8%	12.5%	2.5%	1.3%	31.3%

WITHOUT "DON'T KNOW"

Q9. Thinking about your MOST RECENT contact with Village government staff, please rate your experience using a scale of 1 to 5, where 5 means "strongly agree" and 1 means "strongly disagree." (without "don't know")

(N=80)

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
Q9-1. Village staff was responsive to my needs	44.3%	36.1%	16.4%	1.6%	1.6%
Q9-2. Village staff was competent	46.7%	38.3%	11.7%	1.7%	1.7%
Q9-3. Village staff was courteous	54.1%	32.8%	11.5%	1.6%	0.0%
Q9-4. My issue was resolved promptly	34.5%	41.8%	18.2%	3.6%	1.8%

Q10. Communication. Overall, how satisfied are you with the job the Village of Pinehurst does communicating with business owners? Would you say you are...

Q10. How satisfied are you with the job Village of Pinehurst does communicating with business owners

	Number	Percent
Very satisfied	16	20.0 %
Satisfied	34	42.5 %
Neutral	16	20.0 %
Dissatisfied	4	5.0 %
Very dissatisfied	2	2.5 %
Don't know	8	10.0 %
Total	80	100.0 %

WITHOUT "DON'T KNOW"

Q10. Communication. Overall, how satisfied are you with the job the Village of Pinehurst does communicating with business owners? Would you say you are... (without "don't know")

Q10. How satisfied are you with the job Village of Pinehurst does communicating with business owners

	Number	Percent
Very satisfied	16	22.2 %
Satisfied	34	47.2 %
Neutral	16	22.2 %
Dissatisfied	4	5.6 %
Very dissatisfied	2	2.8 %
Total	72	100.0 %

Q11. Have you visited the Village's website (vopnc.org) during the last 12 months?

Q11. Have you visited Village's website (vopnc.org) during last 12 months		
	Number	Percent
Yes	44	55.0 %
No	33	41.3 %
Don't know	3	3.8 %
Total	80	100.0 %

WITHOUT "DON'T KNOW"

Q11. Have you visited the Village's website (vopnc.org) during the last 12 months? (without "don't know")

Q11. Have you visited Village's website (vopnc.org) during last 12 months		
	Number	Percent
Yes	44	57.1 %
No	33	42.9 %
Total	77	100.0 %

Q11a. Using a scale of 1 to 5, where 5 means "very good" and 1 means "very poor," please rate the Village website with regard to each of the following characteristics.

(N=44)

	Very good	Good	Average	Poor	Don't know
Q11a-1. Easy to navigate	43.2%	29.5%	22.7%	2.3%	2.3%
Q11a-2. Availability of information about Village services	43.2%	34.1%	18.2%	0.0%	4.5%

WITHOUT "DON'T KNOW"

Q11a. Using a scale of 1 to 5, where 5 means "very good" and 1 means "very poor," please rate the Village website with regard to each of the following characteristics. (without "don't know")

(N=44)

	Very good	Good	Average	Poor
Q11a-1. Easy to navigate	44.2%	30.2%	23.3%	2.3%
Q11a-2. Availability of information about Village services	45.2%	35.7%	19.0%	0.0%

Q11b. Overall, how satisfied would you say you were with the Village of Pinehurst Website? Would you say you were...

Q11b. How satisfied were you with Village of Pinehurst website

	Number	Percent
Very satisfied	16	36.4 %
Satisfied	19	43.2 %
Neutral	8	18.2 %
Don't know	1	2.3 %
Total	44	100.0 %

WITHOUT "DON'T KNOW"

Q11b. Overall, how satisfied would you say you were with the Village of Pinehurst Website? Would you say you were... (without "don't know")

Q11b. How satisfied were you with Village of Pinehurst website

	Number	Percent
Very satisfied	16	37.2 %
Satisfied	19	44.2 %
Neutral	8	18.6 %
Total	43	100.0 %

Q12. Have you used the Village's mobile app (MY VOP) during the last 12 months?

Q12. Have you used Village's mobile app (MY VOP) during last 12 months	Number	Percent
Yes	8	10.0 %
No	71	88.8 %
Don't know	1	1.3 %
Total	80	100.0 %

WITHOUT "DON'T KNOW"

Q12. Have you used the Village's mobile app (MY VOP) during the last 12 months? (without "don't know")

Q12. Have you used Village's mobile app (MY VOP) during last 12 months	Number	Percent
Yes	8	10.1 %
No	71	89.9 %
Total	79	100.0 %

Q12a. Overall, how satisfied would you say you were with the Village mobile app, MY VOP? Would you say you were...

Q12a. How satisfied were you with Village mobile app,

<u>MY VOP</u>	<u>Number</u>	<u>Percent</u>
Very satisfied	5	62.5 %
Satisfied	3	37.5 %
Total	8	100.0 %

Q13. Please indicate which of the following are the best ways for the Village to communicate with you to get important information to your business.

Q13. Best ways for Village to communicate with you to

<u>get important information to your business</u>	<u>Number</u>	<u>Percent</u>
Direct mail	27	33.8 %
Village website	23	28.8 %
Email (monthly business e-news)	58	72.5 %
Workshops/business forums	5	6.3 %
Social media	18	22.5 %
Personal calls/visits	14	17.5 %
Newsletters	20	25.0 %
Brochures	8	10.0 %
MY VOP mobile app	2	2.5 %
Other	1	1.3 %
Total	176	

Q13-10. Other

<u>Q13-10. Other</u>	<u>Number</u>	<u>Percent</u>
Phone call	1	100.0 %
Total	1	100.0 %

Q14. Community Development. Using a scale of 1 to 5, where 5 means "very satisfied" and 1 means "very dissatisfied," please indicate how satisfied your business is with the following Village codes and ordinances.

(N=80)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q14-1. Zoning ordinances	15.0%	33.8%	31.3%	3.8%	0.0%	16.3%
Q14-2. Business signage regulations	17.5%	36.3%	23.8%	10.0%	1.3%	11.3%
Q14-3. Historic district guidelines	18.8%	37.5%	27.5%	1.3%	1.3%	13.8%

WITHOUT "DON'T KNOW"

Q14. Community Development. Using a scale of 1 to 5, where 5 means "very satisfied" and 1 means "very dissatisfied," please indicate how satisfied your business is with the following Village codes and ordinances. (without "don't know")

(N=80)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q14-1. Zoning ordinances	17.9%	40.3%	37.3%	4.5%	0.0%
Q14-2. Business signage regulations	19.7%	40.8%	26.8%	11.3%	1.4%
Q14-3. Historic district guidelines	21.7%	43.5%	31.9%	1.4%	1.4%

Q15. Village Events. Using a scale of 1 to 3, where 3 means "positive impact" and 1 means "negative impact," please indicate the impact the following events in the Village Center have on your business.

(N=80)

	Positive impact	No impact	Negative impact	Don't know
Q15-1. Farmer's Markets	38.8%	51.3%	0.0%	10.0%
Q15-2. Live After Five Concerts	36.3%	47.5%	6.3%	10.0%
Q15-3. Parades (e.g. Fourth of July, St. Patrick's Day, US Kids)	41.3%	47.5%	2.5%	8.8%
Q15-4. Holly Arts & Crafts Festival	43.8%	45.0%	1.3%	10.0%
Q15-5. Tree Lighting	40.0%	51.3%	0.0%	8.8%
Q15-6. Shakespeare in the Pines	26.3%	60.0%	1.3%	12.5%
Q15-7. Sandhills Motoring Festival	33.8%	52.5%	0.0%	13.8%
Q15-8. Other cultural activities (e.g. performing arts)	35.0%	48.8%	1.3%	15.0%

WITHOUT "DON'T KNOW"

Q15. Village Events. Using a scale of 1 to 3, where 3 means "positive impact" and 1 means "negative impact," please indicate the impact the following events in the Village Center have on your business. (without "don't know")

(N=80)

	Positive impact	No impact	Negative impact
Q15-1. Farmer's Markets	43.1%	56.9%	0.0%
Q15-2. Live After Five Concerts	40.3%	52.8%	6.9%
Q15-3. Parades (e.g. Fourth of July, St. Patrick's Day, US Kids)	45.2%	52.1%	2.7%
Q15-4. Holly Arts & Crafts Festival	48.6%	50.0%	1.4%
Q15-5. Tree Lighting	43.8%	56.2%	0.0%
Q15-6. Shakespeare in the Pines	30.0%	68.6%	1.4%
Q15-7. Sandhills Motoring Festival	39.1%	60.9%	0.0%
Q15-8. Other cultural activities (e.g. performing arts)	41.2%	57.4%	1.5%

Q16. Please indicate how satisfied you are with the way the Village handles events that attract large crowds to the Village (e.g. considering the needs of businesses, addressing noise and disturbance issues)?

Q16. How satisfied are you with the way Village handles events that attract large crowds to Village	Number	Percent
Very satisfied	25	31.3 %
Satisfied	27	33.8 %
Neutral	14	17.5 %
Dissatisfied	6	7.5 %
Very dissatisfied	1	1.3 %
Don't know	7	8.8 %
Total	80	100.0 %

WITHOUT "DON'T KNOW"

Q16. Please indicate how satisfied you are with the way the Village handles events that attract large crowds to the Village (e.g. considering the needs of businesses, addressing noise and disturbance issues)? (without "don't know")

Q16. How satisfied are you with the way Village handles events that attract large crowds to Village	Number	Percent
Very satisfied	25	34.2 %
Satisfied	27	37.0 %
Neutral	14	19.2 %
Dissatisfied	6	8.2 %
Very dissatisfied	1	1.4 %
Total	73	100.0 %

Q17. Using a scale of 1 to 5, where 5 means "extremely important" and 1 means "not important," please indicate how important each of the following reasons were in your decision to locate your business in the Village of Pinehurst.

(N=80)

	Extremely important	Very important	Important	Less important	Not important	Not provided
Q17-1. Overall image of Village	37.5%	23.8%	10.0%	2.5%	5.0%	21.3%
Q17-2. Safety & security	41.3%	26.3%	8.8%	0.0%	3.8%	20.0%
Q17-3. Availability of trained employees	18.8%	17.5%	17.5%	3.8%	16.3%	26.3%
Q17-4. Low property tax rate	22.5%	17.5%	11.3%	5.0%	12.5%	31.3%
Q17-5. Quality healthcare	27.5%	15.0%	13.8%	8.8%	8.8%	26.3%
Q17-6. Affordable rent	22.5%	20.0%	12.5%	6.3%	11.3%	27.5%
Q17-7. Proximity to family or friends	25.0%	21.3%	15.0%	5.0%	8.8%	25.0%
Q17-8. Quality of public education	22.5%	13.8%	11.3%	5.0%	17.5%	30.0%
Q17-9. Overall quality of life in Village	37.5%	23.8%	13.8%	2.5%	2.5%	20.0%

WITHOUT "NOT PROVIDED"

Q17. Using a scale of 1 to 5, where 5 means "extremely important" and 1 means "not important," please indicate how important each of the following reasons were in your decision to locate your business in the Village of Pinehurst. (without "not provided")

(N=80)

	Extremely important	Very important	Important	Less important	Not important
Q17-1. Overall image of Village	47.6%	30.2%	12.7%	3.2%	6.3%
Q17-2. Safety & security	51.6%	32.8%	10.9%	0.0%	4.7%
Q17-3. Availability of trained employees	25.4%	23.7%	23.7%	5.1%	22.0%
Q17-4. Low property tax rate	32.7%	25.5%	16.4%	7.3%	18.2%
Q17-5. Quality healthcare	37.3%	20.3%	18.6%	11.9%	11.9%
Q17-6. Affordable rent	31.0%	27.6%	17.2%	8.6%	15.5%
Q17-7. Proximity to family or friends	33.3%	28.3%	20.0%	6.7%	11.7%
Q17-8. Quality of public education	32.1%	19.6%	16.1%	7.1%	25.0%
Q17-9. Overall quality of life in Village	46.9%	29.7%	17.2%	3.1%	3.1%

Q18. What are the most important issues facing Pinehurst today?

- 3 break-ins in 5 years. NO Arrests or updates
- Attracting younger families.
- CONGESTION ON HIGHWAY 5, STORM WATER RUNOFF, GROWTH AND EXPANSION.
- Continued growth and infrastructure.
- Declining tourism and lack of merchants in the Village
- Developing future vibrancy plans, parking
- development
- Development in outer areas. Pinehurst is the core attraction of the entire area. Hopefully the outside development won't diminish the reputation the village has for history, cleanliness, safety, and beauty. I am strongly against a parking deck in the Village core. The quality of the restaurants in Pinehurst is more than adequate. I believe the economy (supply and demand) will take care of whether we need more restaurants in the Village core.
- Empty store fronts. The Village should not sit by and allow prime spaces to sit vacant, i.e. BBT building, theater building and up until recently department store. Aberdeen is looking to pass a law to make landlords more liable for their spaces. If a space sits vacant for too long the landlord will be fined. We hear all the time from customers and residents that the village is losing its appeal and becoming more of a ghost town. The theater building has become a black hole that no money is being invested into it to make it more desirable for new tenants. Parking. We hear it every day that there is limited parking and customers will circle and if they can't find parking they will leave. We sit and watch the real estate, lawyers, banking and restaurant employees park up front in prime parking for paying customers.
- Events in the village are a great but they don't create spending in the stores. We need events that drive business. Disconnect between hotel and village. We hear it all the time that the Resort doesn't utilize the charm of the village it resides in enough. It would be more beneficial to both parties if we became more connected through sharing information and sharing events, things to do with each side. The Resort looks to keep all spending on their property. It doesn't allow the village to benefit or the tourist to have a reason to come back.
- From a business point of view in the heart of the Village: PARKING...cleanliness...code enforcement...I could go on and on. The image of the heart of the village is not what it was or should be, this from residents and visitors alike. While it is still nice and visual we are letting go of our unique identity and morphing into any town USA. Why will Pinehurst be so desirable then? It takes time, effort and money to come here and when people decide to come, we should be dazzling them with charm, uniqueness, visually pleasing, well maintained streets and structures, clean sidewalks, clean garbage cans, etc., etc. We are taking the easy and lazy way out by allowing Pinehurst to become like every other town, when we should be preserving and protecting what put us on the map and made us special...and I say this while still understanding growth and moving forward. This comment is from a business point of view and regarding the heart of the VOP. I have been in business here 14.5 years...I would never open here now.
- Growth
- Growth and how to address what is coming. The whole county is growing and how will the Village face this growth? Also, parking by employees and not customers in front of other businesses (but I have no good solution for that except each business must be considerate of the other businesses spaces). The future of the Library.
- Growth vs limited growth
- Growth within our community and schools to accommodate that growth and roads for that growth to travel on. It's not a sleepy little retirement town like it used to be. More and more young families are coming to the area because of the current schools and that's a good thing. Pinehurst is a great place to raise a family.

Q18. What are the most important issues facing Pinehurst today? (cont.)

- Growth within small area, transportation, safety
- Growth/Traffic
- Handling the burgeoning growth
- How to attract business that can last for more than a year or a season in the Village.
- INTELLIGENT GROWTH
- Lack of sustainable retail foot traffic in the village on a daily basis.
- Lost the Attention or desire of the discriminating client to visit or locate here. No leadership or unity to attract new retail in the Village.
- managing growth
- More businesses. Water removal during storms.
- Our business is not located in the Village.
- Overcrowding, particularly at events. Lack of businesses/retail shops in the village. Darn streets at night.
- Parking and lack of diversity of shops. Not everyone that comes to Pinehurst wants to buy a house.
- PARKING ON SUNDAYS
- PARKING. The additional parking spaces added to McIntyre Road are great. We have only three parking spaces directly in front of our building and the customers who go to Maxies often park in these spaces instead of using Maxie's parking lot. We have elderly customers who come to the shop and it is difficult for them to walk from the
- parking spaces across the street. The service trucks who go to Maxies block our parking area -- sometimes for long periods of time.
- PINEHURST MERCHANTS TAKE UP ALL PARKING BY 9 AM, THEY NEED TO FIND PARKING FOR BUSINESS PEOPLE, I GET A RIDE TO WORK TO SAVE A SPOT.
- Planning for and accommodating the economic growth of the area, especially in improvements to transportation (roads and streets), and good land use planning in coordination with adjacent communities.
- PRESERVATION OF WILDLIFE AND FORESTRY AND GROWTH.
- REFUSAL TO ACCEPT CHANGE AND ADAPT, BE PROACTIVE VERSE RELATIVE AS WE ARE NOW.
- Roads are in poor condition
- SUPPORT OF SMALL BUSINESS OWNERS AND STREETS, KEEP GROUNDS CLEAR AND CLEAN.
- The change in demographic. Pinehurst continues to get younger, particularly with the expansion of the fort brag bringing in additional soldiers. Pinehurst needs to be prepared to serve this community with the ever shifting demographic.
- The council is old school and does not see the need for growth, or should I say unwilling to make concessions as it relates to the village concerning growth. I understand they have a desire to preserve village proper but need to see that changes need to be made in order to accommodate growth.
- Traffic
- Traffic
- TRAFFIC, PARKING IN TOWN, TRAFFIC CIRCLE ACCIDENTS.

Q19. Do you have any suggestions for how the Village could serve your business better?

- Businesses partnering together to support each other
- Encourage more people to shop in the village!
- Fix roads near business. Large potholes and broken pavement.
- I admire the Village's strong zoning requirements. The Tufts preserved Pinehurst for many years, and the town is following in their footsteps.
- It would definitely help if the Village subscribed to the philosophy that it helps the local economy to purchase locally. It seems Village purchasing would rather purchase the products we supply from national vendors rather than helping to support the local economy. This is true even when the prices locally are competitive with superior customer service. After making numerous attempts to work with them on local purchasing, we have basically given up on the Village.
- Make the two extremely large parking places in front of my showroom into three! Most locals always park three cars there anyways. Also put up a one way sign post on Market Square as at least twice a week cars go down the wrong way.
- Making the town more business friendly. Less regulation and restriction on business would have the largest impact. Population size has already begun to increase with a much younger demographic. Getting more businesses in the area that cater to this, would be beneficial.
- More Events IN the village, but scheduled so that it benefits no deters customers. (Should consult retail business owners/managers for ideas).
- More up lighting (streets lights are blocked by the trees, so it appears dark until you get right up under it). Music playing in the landscape. (encourages people to stay in the village). Rocking chairs placed at corners on sidewalks (again, encourages people to stay)
- More merchants would attract more foot traffic.
- More nighttime police patrols to the only pharmacy in the city limits that has 3 break in within 5 years at night with no arrests
- no, good job
- Public transportation to the medical facilities and possibly businesses would be an asset. Could use remote parking areas (ballfields, abandoned shopping center areas)
- RE-ESTABLISH PARTNERSHIP WITH PINEHURST BUSINESS PARTNERS NON-PROFIT GROUP TO WORK ON CO-SPONSORSHIP AND CUSTOMER FIRST PARKING.
- Stable staffing and consistent policies that are equally applied to all.
- Street lighting (to keep in-line with historic appearance, i.e. lantern style, etc.). Perhaps spotlighting a business in the Village in each newsletter so residence and other businesses know what businesses are here.
- We are in the service district - by most people's comments - the dregs.
- When I asked why our side of the block didn't get sidewalks - I was told because no one wants to walk past here.
- We are very satisfied with this great community.
- WE NEED TO ADAPT OR SUFFER, IT PAINS ME TO SEE SOUTHERN PINES PROSPERING WITH SMALL BUSINESS GROWTH, AND WE KEEP GETTING MORE AND MORE REALTORS.
- Yes, get a few fresh bodies with voting power that would bring about a little diversity in the overall decision making process. I think varied age ranges would produce better insight as well as ideas as it relates to growth and how to better serve its population.
- Yes, many...but no one is or has been listening.

Q20. Business Category. Please indicate the primary business category for your business.

<u>Q20. Primary business category for your business</u>	<u>Number</u>	<u>Percent</u>
Retail	11	13.8 %
Restaurants & food services	4	5.0 %
Inn	3	3.8 %
Professional, scientific, & technical services	10	12.5 %
Financial & insurance	6	7.5 %
Real estate & rental leasing	8	10.0 %
Health care & social assistance	16	20.0 %
Arts, entertainment, & recreation	6	7.5 %
Other	16	20.0 %
Total	80	100.0 %

Q20-9. Other

<u>Q20-9. Other</u>	<u>Number</u>	<u>Percent</u>
Services	1	9.1 %
Commercial printer	1	9.1 %
Office space and barber shop	1	9.1 %
Non-profit membership organization	1	9.1 %
Non-profit for Veterans and their families, golf	1	9.1 %
Construction	1	9.1 %
Religious	1	9.1 %
Pet grooming	1	9.1 %
TRAVEL	1	9.1 %
Online retail and wholesale	1	9.1 %
CHURCH	1	9.1 %
Total	11	100.0 %

Q21. How many years have you been in operation in the Village of Pinehurst?

Q21. How many years have you been in operation in Village of Pinehurst

	Number	Percent
0-5 years	15	18.8 %
6-10 years	11	13.8 %
11-15 years	13	16.3 %
16-20 years	2	2.5 %
20+ years	33	41.3 %
Not provided	6	7.5 %
Total	80	100.0 %

WITHOUT "NOT PROVIDED"

Q21. How many years have you been in operation in the Village of Pinehurst? (without "not provided")

Q21. How many years have you been in operation in Village of Pinehurst

	Number	Percent
0-5 years	15	20.3 %
6-10 years	11	14.9 %
11-15 years	13	17.6 %
16-20 years	2	2.7 %
20+ years	33	44.6 %
Total	74	100.0 %

Q22. Please answer the following questions.

(N=80)

	Yes	No	Not provided
Q22-1. Are you a member of Pinehurst Business Partners	22.5%	73.8%	3.8%
Q22-2. Are you a member of Moore County Chamber of Commerce	36.3%	60.0%	3.8%
Q22-3. Is your business located in Village Center	30.0%	67.5%	2.5%

WITHOUT "NOT PROVIDED"

Q22. Please answer the following questions. (without "not provided")

(N=80)

	Yes	No
Q22-1. Are you a member of Pinehurst Business Partners	23.4%	76.6%
Q22-2. Are you a member of Moore County Chamber of Commerce	37.7%	62.3%
Q22-3. Is your business located in Village Center	30.8%	69.2%

Section 4

Survey Instrument



HISTORY, CHARM, AND SOUTHERN HOSPITALITY _____

July 2019

Dear Village of Pinehurst Business Owner,

Each year, the Village of Pinehurst surveys its business owners to obtain feedback on how the Village is meeting the needs of its businesses. We invite you to participate in this year's survey by providing your personal opinion. By taking approximately 10 minutes to complete the anonymous survey, you can help make an impact on the Village of Pinehurst. The feedback we receive will help Village leaders and elected officials set community priorities including staffing and budget expenditures, determine areas or services that need improvement, and identify future needs. We strive to exceed your expectations as we promote, enhance, and sustain the quality of life in the Village of Pinehurst.

Complete the survey using the paper survey and postage paid envelope provided or complete it online by visiting www.2019PinehurstBusinessSurvey.com.

The survey data will be collected and analyzed by ETC Institute, one of the nation's leading governmental research firms. ETC representatives will present the results to the Pinehurst Village Council at a public meeting in September. Please join us to hear the results!

If you have any questions about the survey, please contact me at 295-1900, ext. 1101. Thank you for participating in the 2019 Business Survey.

Sincerely,

Jeffrey M. Sanborn
Village Manager

ADMINISTRATION

395 Magnolia Road • Pinehurst, NC 28374 • Telephone (910) 295-1900 • Fax (910) 295-4434 • www.vopnc.org



2019 Village of Pinehurst Business Survey

Please take a few minutes to complete this survey. Your input is an important part of the Village's ongoing effort to identify and respond to business concerns. If you have questions, please contact Jeff Sanborn, Village Manager at (910) 295-1900, ext. 1101 or at jsanborn@vopnc.org.

1. **Community Service Satisfaction.** Please indicate if your business has used each of the services or departments listed below in the past year. If "Yes," please rate the service or department using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

Service/Department	Has your business used this service or department in the past year?		Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
1. Building Inspections	Yes	No	5	4	3	2	1	9
2. Fire Inspections	Yes	No	5	4	3	2	1	9
3. Planning and Zoning	Yes	No	5	4	3	2	1	9
4. Code Enforcement	Yes	No	5	4	3	2	1	9
5. Police Patrol	Yes	No	5	4	3	2	1	9
6. Police Emergency Response	Yes	No	5	4	3	2	1	9
7. Fire Emergency Response	Yes	No	5	4	3	2	1	9
8. Village Hall (Front Desk)	Yes	No	5	4	3	2	1	9
9. Streets and Grounds	Yes	No	5	4	3	2	1	9

2. Which THREE of the Village services or departments listed above are the MOST IMPORTANT to your business? [Write in your answers below using the numbers from the list in Question 1.]

1st: ____ 2nd: ____ 3rd: ____

3. In general, how satisfied are you with the overall quality of services provided to your business by the Village of Pinehurst? Would you say the quality of services provided is...

____ (1) Significantly higher than your expectations ____ (4) Below your expectations
 ____ (2) Higher than your expectations ____ (5) Significantly below your expectations
 ____ (3) Meets your expectations ____ (9) Don't know

4. Using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied," please indicate how satisfied your business is with the Village in the following areas.

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
1. Supporting business growth and development	5	4	3	2	1	9
2. Availability of employee and customer parking around your business	5	4	3	2	1	9
3. Condition of sidewalks	5	4	3	2	1	9
4. Creating and promoting special events	5	4	3	2	1	9
5. Historic preservation efforts	5	4	3	2	1	9
6. Cleanliness of Village streets and public areas	5	4	3	2	1	9
7. Landscape maintenance in rights of way and public areas	5	4	3	2	1	9

5. **Perceptions of the Village.** Several items that may influence your business's perception of the Village of Pinehurst are listed below. Please rate each item using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

		Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
1.	Overall image of the Village	5	4	3	2	1	9
2.	Overall quality of life	5	4	3	2	1	9
3.	Overall feeling of safety	5	4	3	2	1	9

6. **Thinking generally about the Village of Pinehurst, how likely would you be to recommend the Village as a business location to friends, family, and co-workers?**

___(1) Very likely ___(3) Somewhat likely ___(5) Not likely at all
 ___(2) Likely ___(4) Not likely ___(9) Don't know

7. **Which of the following best describes the overall business atmosphere in the Village of Pinehurst today, compared to two years ago?**

___(1) Better ___(3) No change, but poor ___(9) Don't know
 ___(2) No change, but good ___(4) Worse

8. **Customer Service.** Overall, how would you rate the Village of Pinehurst customer service? Would you say it is...

___(1) Very good ___(3) Poor ___(9) Don't know
 ___(2) Good ___(4) Very poor

9. **Thinking about your MOST RECENT contact with Village government staff, please rate your experience using a scale of 1 to 5, where 5 means "Strongly Agree" and 1 means "Strongly Disagree."**

	Customer Service Characteristics	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know
1.	Village staff was responsive to my needs	5	4	3	2	1	9
2.	Village staff was competent	5	4	3	2	1	9
3.	Village staff was courteous	5	4	3	2	1	9
4.	My issue was resolved promptly	5	4	3	2	1	9

10. **Communication.** Overall, how satisfied are you with the job the Village of Pinehurst does communicating with business owners? Would you say you are...

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

11. **Have you visited the Village's website (vopnc.org) during the last 12 months?**

___(1) Yes [Answer Q11a-b.] ___(2) No [Skip to Q12.] ___(9) Don't know [Skip to Q12.]

- 11a. **Using a scale of 1 to 5, where 5 means "Very Good" and 1 means "Very Poor," please rate the Village website with regard to each of the following characteristics.**

		Very Good	Good	Average	Poor	Very Poor	Don't Know
1.	Easy to navigate	5	4	3	2	1	9
2.	Availability of information about Village services	5	4	3	2	1	9

- 11b. **Overall, how satisfied would you say you were with the Village of Pinehurst Website? Would you say you were...**

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

12. **Have you used the Village's mobile app (MY VOP) during the last 12 months?**
 ___(1) Yes [Answer Q12a.] ___(2) No [Skip to Q13.] ___(9) Don't know [Skip to Q13.]

12a. **Overall, how satisfied would you say you were with the Village mobile app, MY VOP? Would you say you were...**
 ___(1) Very satisfied ___(3) Neutral ___(5) Very dissatisfied
 ___(2) Satisfied ___(4) Dissatisfied ___(9) Don't know

13. **Please indicate which of the following are the best ways for the Village to communicate with you to get important information to your business. [Check all that apply.]**
 ___(01) Direct mail ___(05) Social media ___(09) MY VOP mobile app
 ___(02) Village website ___(06) Personal calls/visits ___(10) Other: _____
 ___(03) Email (Monthly Business eNews) ___(07) Newsletters
 ___(04) Workshops/Business Forums ___(08) Brochures

14. **Community Development. Using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied," please indicate how satisfied your business is with the following Village codes and ordinances.**

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
1. Zoning ordinances	5	4	3	2	1	9
2. Business signage regulations	5	4	3	2	1	9
3. Historic District Guidelines	5	4	3	2	1	9

15. **Village Events. Using a scale of 1 to 3, where 3 means "Positive Impact" and 1 means "Negative Impact," please indicate the impact the following events in the Village Center have on your business.**

	Positive Impact	No Impact	Negative Impact	Don't Know
1. Farmer's Markets	3	2	1	9
2. Live After Five Concerts	3	2	1	9
3. Parades (e.g. Fourth of July, St. Patrick's Day, US Kids)	3	2	1	9
4. Holly Arts and Crafts Festival	3	2	1	9
5. Tree Lighting	3	2	1	9
6. Shakespeare in the Pines	3	2	1	9
7. Sandhills Motoring Festival	3	2	1	9
8. Other cultural activities (e.g. performing arts)	3	2	1	9

16. **Please indicate how satisfied you are with the way the Village handles events that attract large crowds to the Village (e.g. considering the needs of businesses, addressing noise and disturbance issues)?**
 ___(1) Very satisfied ___(3) Neutral ___(5) Very dissatisfied
 ___(2) Satisfied ___(4) Dissatisfied ___(9) Don't know

17. Using a scale of 1 to 5, where 5 means "Extremely Important" and 1 means "Not Important," please indicate how important each of the following reasons were in your decision to locate your business in the Village of Pinehurst.

	Extremely Important	Very Important	Important	Less Important	Not Important
1. Overall image of the Village	5	4	3	2	1
2. Safety and security	5	4	3	2	1
3. Availability of trained employees	5	4	3	2	1
4. Low property tax rate	5	4	3	2	1
5. Quality healthcare	5	4	3	2	1
6. Affordable rent	5	4	3	2	1
7. Proximity to family or friends	5	4	3	2	1
8. Quality of public education	5	4	3	2	1
9. Overall quality of life in the Village	5	4	3	2	1

18. **Additional Feedback.** What are the most important issues facing Pinehurst today?

19. Do you have any suggestions for how the Village could serve your business better?

20. **Business Category.** Please indicate the primary business category for your business.

- | | |
|---|--|
| <input type="checkbox"/> (1) Retail | <input type="checkbox"/> (6) Real Estate and Rental Leasing |
| <input type="checkbox"/> (2) Restaurants and Food Services | <input type="checkbox"/> (7) Health Care and Social Assistance |
| <input type="checkbox"/> (3) Inn | <input type="checkbox"/> (8) Arts, Entertainment, and Recreation |
| <input type="checkbox"/> (4) Professional, Scientific, and Technical Services | <input type="checkbox"/> (9) Other: _____ |
| <input type="checkbox"/> (5) Financial and Insurance | |

21. How many years have you been in operation in the Village of Pinehurst?

- (1) 0-5 years (2) 6-10 years (3) 11-15 years (4) 16-20 years (5) 20+ years

22. Please answer the following questions.

1. Are you a member of Pinehurst Business Partners?	Yes	No
2. Are you a member of the Moore County Chamber of Commerce?	Yes	No
3. Is your business located in the Village Center?	Yes	No

This concludes the survey – Thank you for your time!

Please return your completed survey in the enclosed postage paid envelope addressed to:
ETC Institute, 725 W. Frontier Circle, Olathe, KS 66061

Your responses will remain completely confidential. The information printed to the right will ONLY be used to help identify the level of satisfaction with Village services in your area. If your address is not correct, please provide the correct information. Thank you.