

2020 Resident Survey

Village of Pinehurst, NC

Presented by



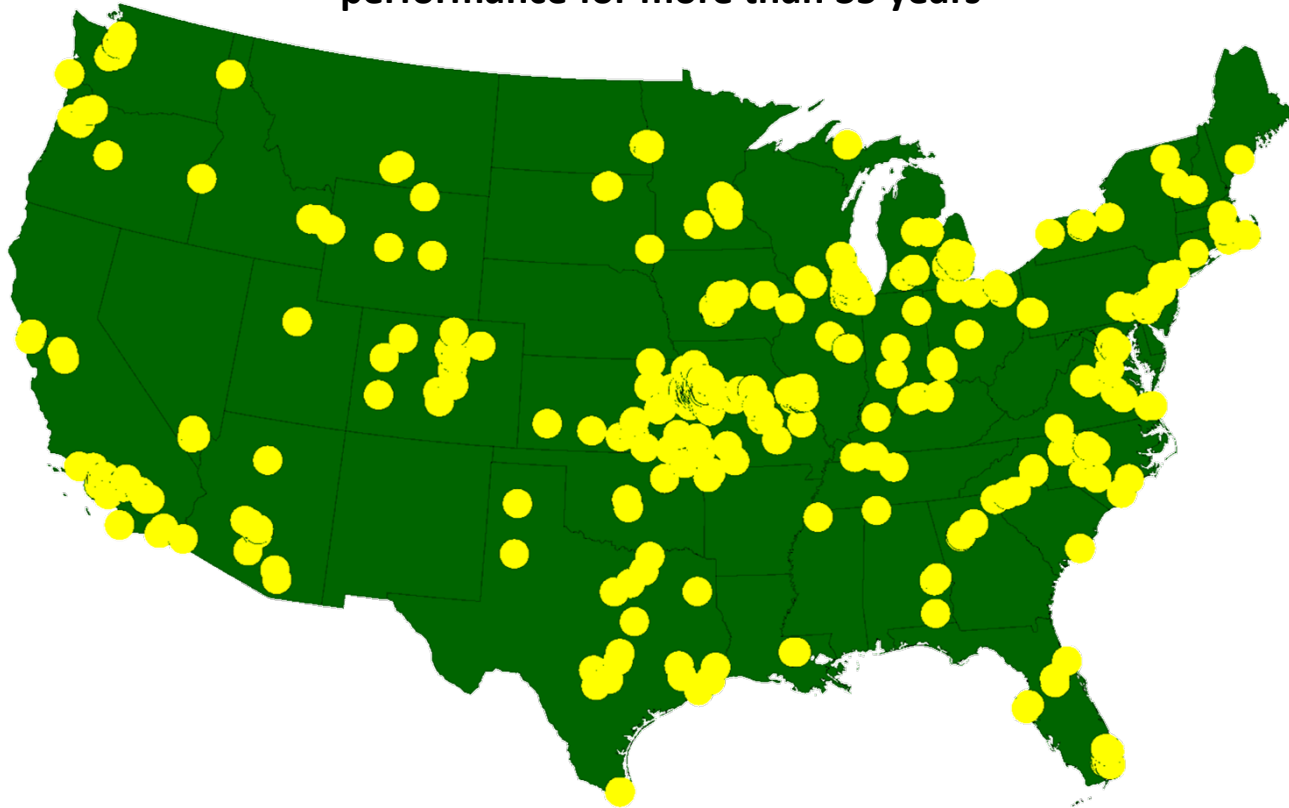
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September 2020

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Agenda

- **Purpose and Methodology**
- **Bottom Line Upfront**
- **Major Findings**
- **Summary**
- **Questions**

Purpose

- **To objectively assess resident 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
- 9th 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:**

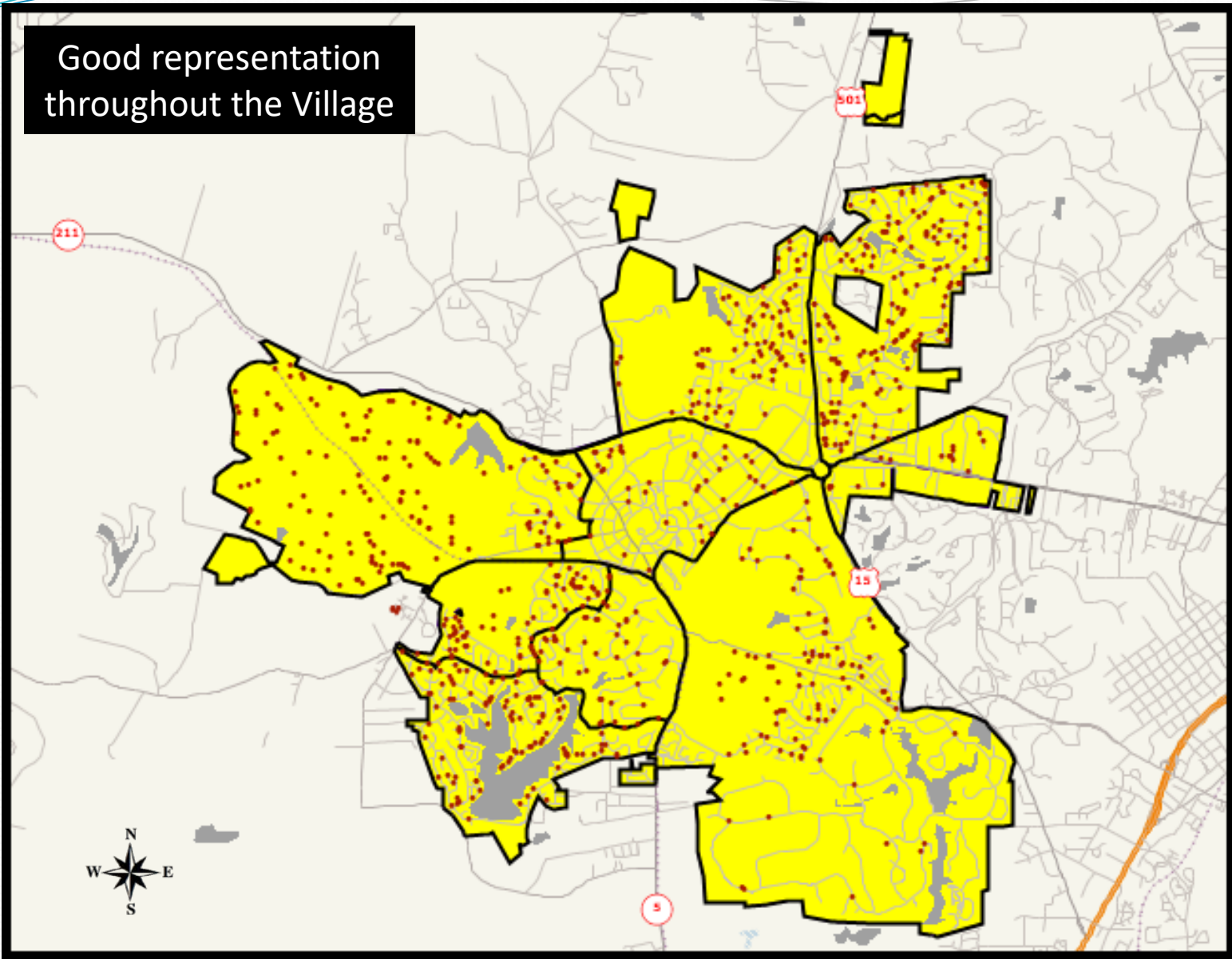
- completed surveys: 803 (far exceeded goal of 400)
- demographics of survey respondents accurately reflects the actual population of the Village

- **Confidence level:** 95%

- **Margin of error:** +/- 3.4% overall

Location of Survey Respondents

Good representation throughout the Village



Village of Pinehurst 2020 Resident Survey

Bottom Line Up Front

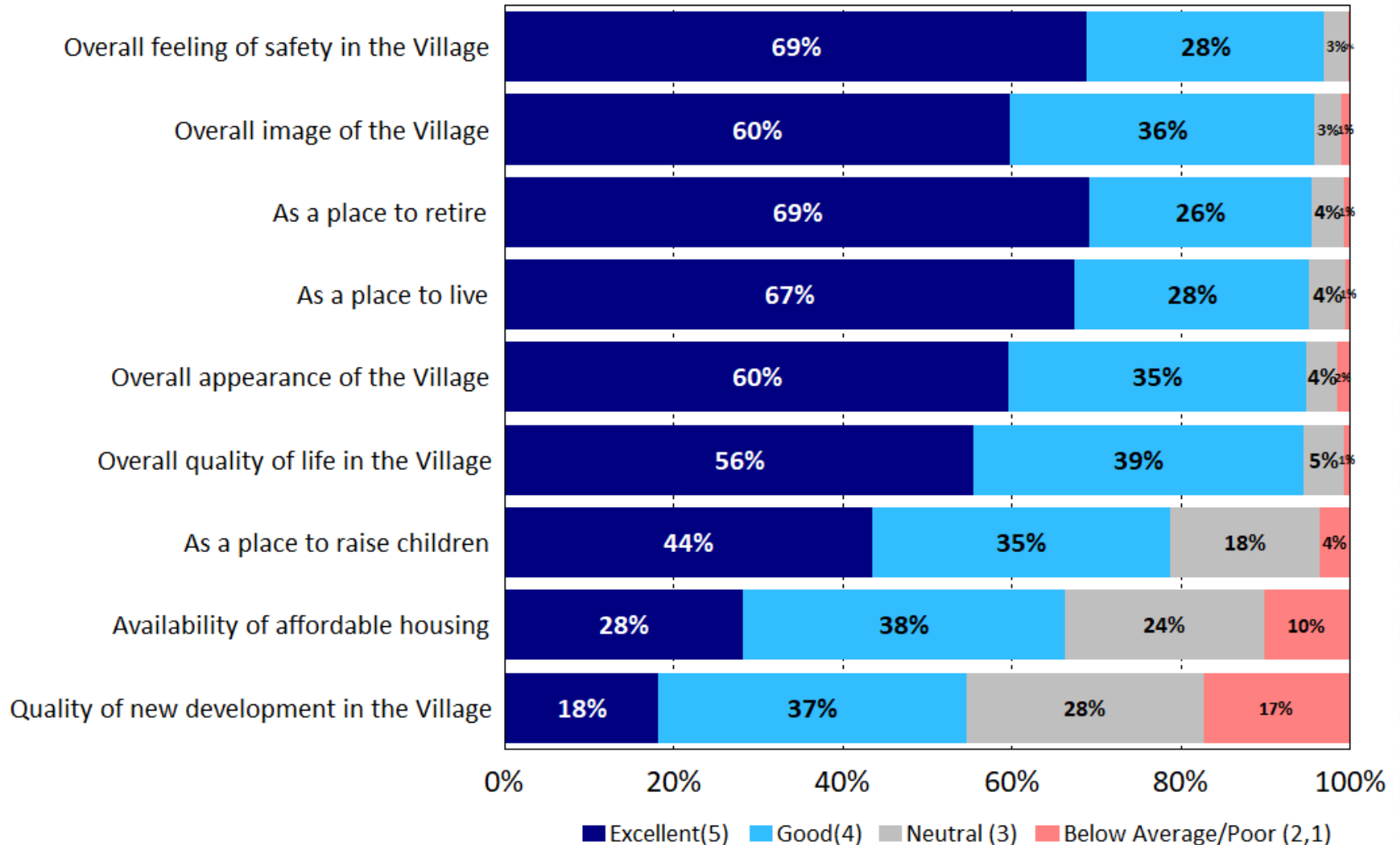
- **Residents Have a Very Positive Perception of the Village**
 - ❑ 95% rated Pinehurst as excellent or good place to live
 - ❑ 95% would recommend Pinehurst to others as a place to live
- **The Village Is Moving in the Right Direction**
 - ❑ Satisfaction ratings have increased or stayed the same in 64 of 86 areas since 2019, and 69 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 52 of 55 areas
 - ❑ Satisfaction with Customer Service from Village Employees rated 40% above the U.S. Average
 - ❑ Satisfaction with Value Received for Property Taxes rated 39% above the U.S. Average
- **Overall Community Priorities:**
 - ❑ Efforts at maintaining the quality of neighborhoods
 - ❑ Enforcement of Village codes and ordinances
 - ❑ Street and right-of-way maintenance

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")

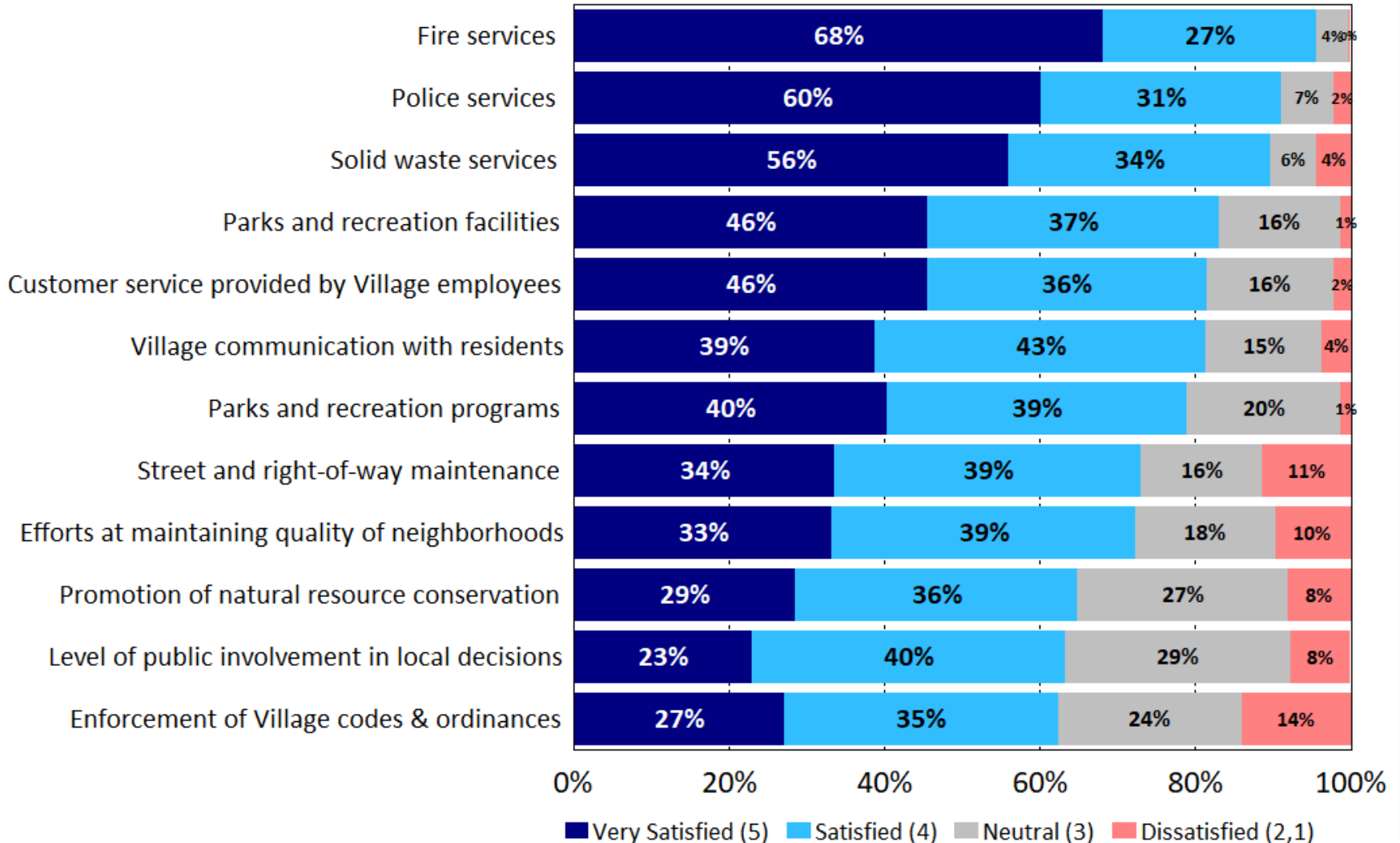


Source: ETC Institute DirectionFinder (2020 - Pinehurst, NC)

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

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")

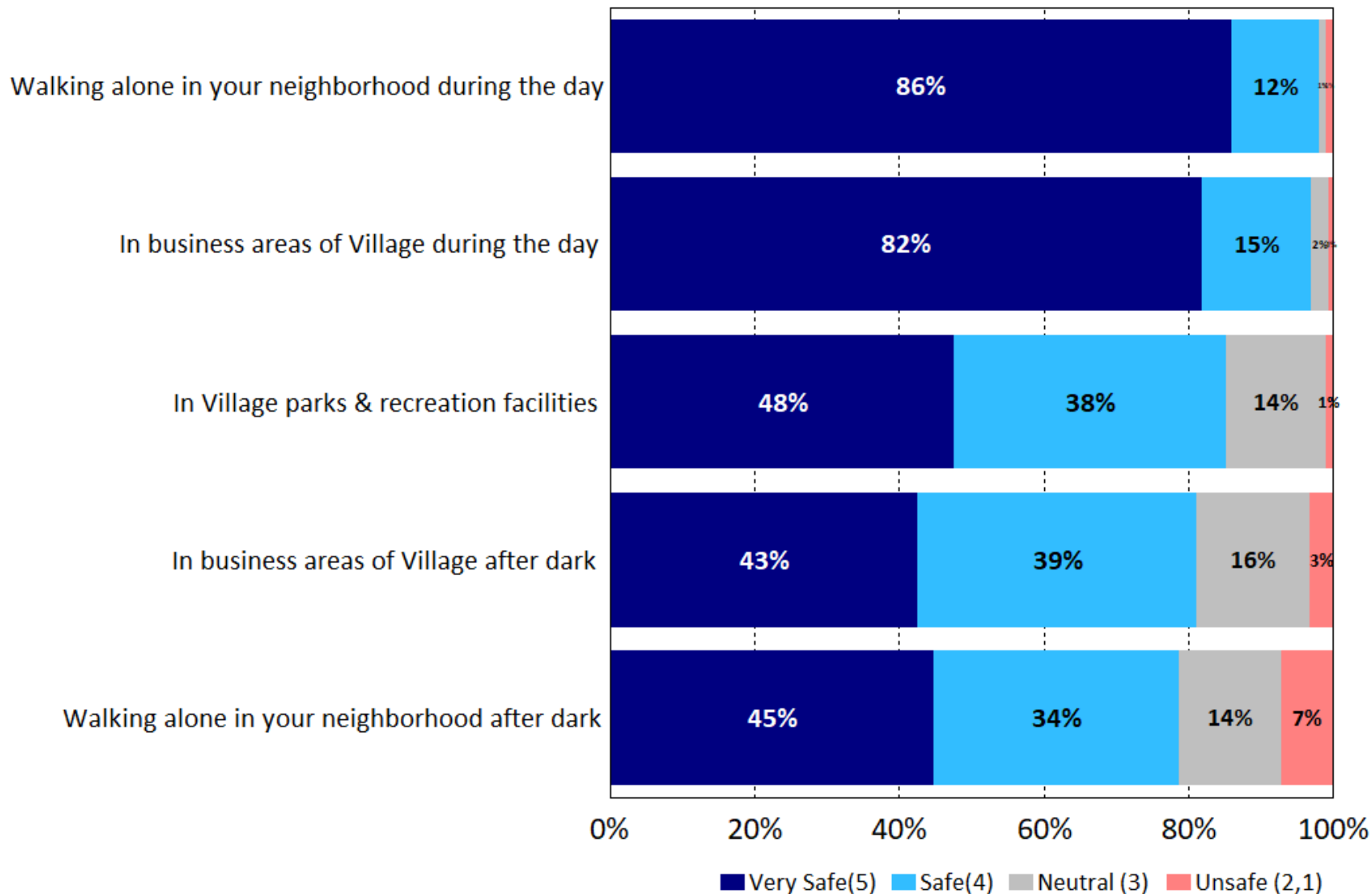


Source: ETC Institute DirectionFinder (2020 - Pinehurst, NC)

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")

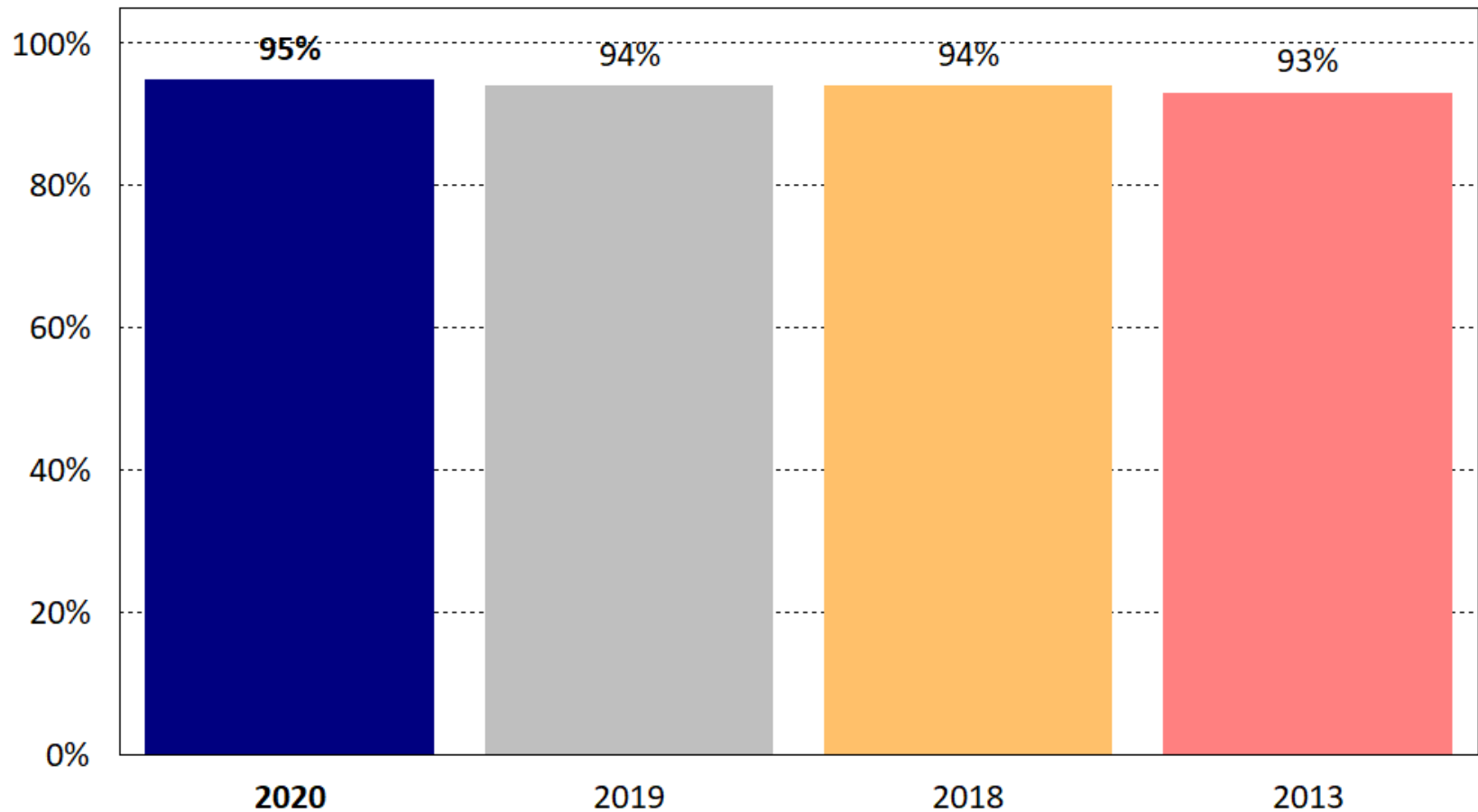


Source: ETC Institute DirectionFinder (2020 - Pinehurst, NC)

Residents Feel Safe in Pinehurst

Q29. Would you recommend Pinehurst to others as a place to live?

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



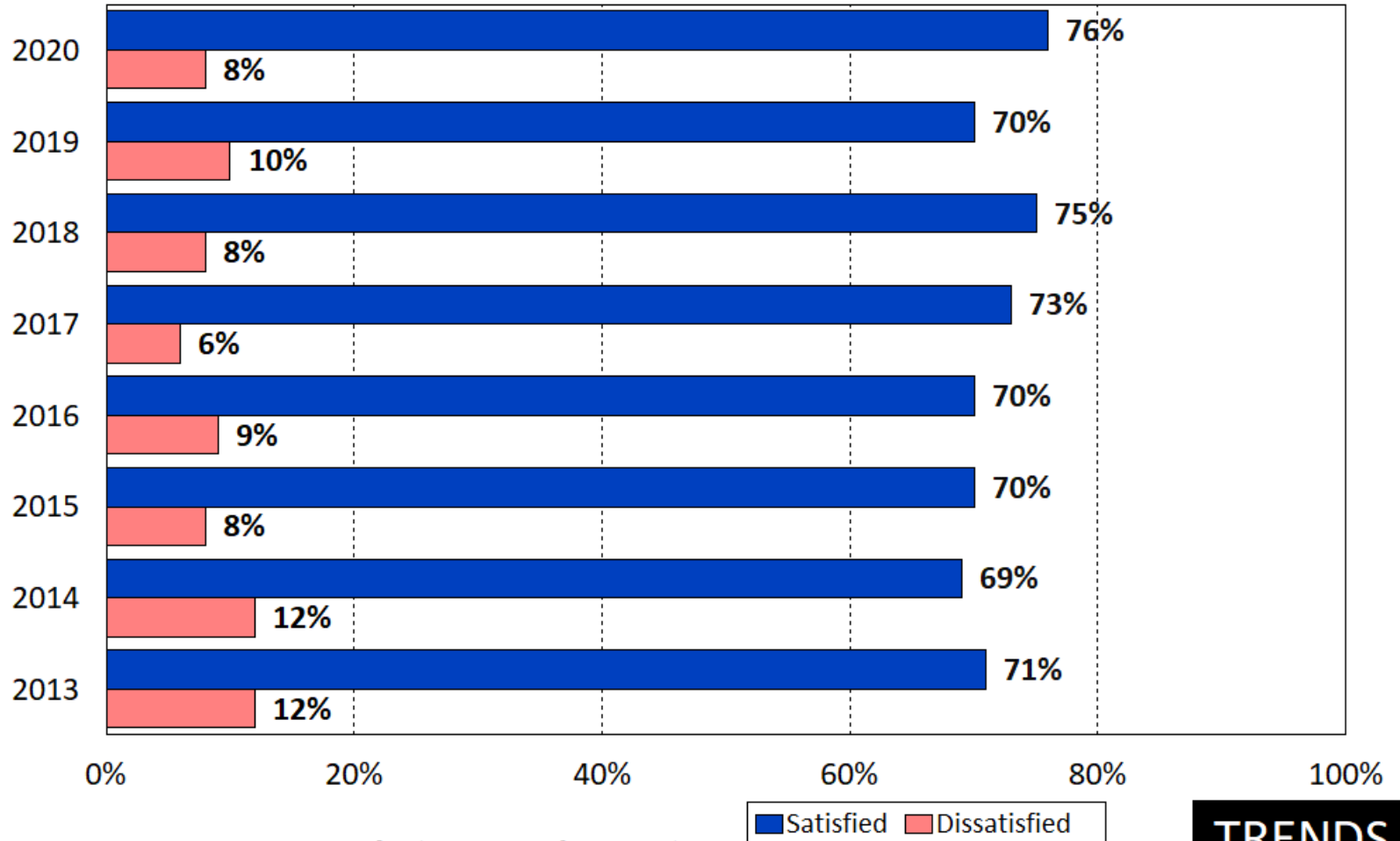
Source: ETC Institute DirectionFinder (2020 - Pinehurst, NC)

TRENDS

95% of Residents Would Recommend Pinehurst to Others as a Place to Live

Q26. 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 who answered "very satisfied" or "satisfied" (excluding "don't know")



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

TRENDS

More Than a 9-1 Ratio of Residents Who Are Satisfied vs. Dissatisfied (76% vs. 8%) with the Value Received for Property Taxes Funding the Village's Operating Budget

Major Finding #2

**The Village Is Moving in the
Right Direction**

Trend Analysis

Since 2019 the Satisfaction Ratings Have...

- Increased in 57 of 86 areas
- Stayed the Same in 7 of 86 areas
- Decreased in 22 of 86 areas

22 Areas Had a Significant Increase in Satisfaction (+4% or more)

2 Areas Had a Significant Decrease in Satisfaction (-4% or more)

Trends

Satisfaction Increases of More Than 5% Since 2019

- Quality of recreation indoor facilities (+16%)
- Availability of recreation indoor facilities (+15%)
- Quality of leadership by elected officials (+15%)***
- Quality of stormwater runoff/management system (+10%)
- Effectiveness of appointed boards and commissions (+10%)***
- Effectiveness of Village manager and appointed staff (+10%)***
- Efforts at maintaining quality of neighborhoods (+8%)
- Curbside recycling services (+8%)
- Street and right-of-way maintenance (+8%)
- Solid waste services (+7%)
- Value received for property taxes (+6%)

No Satisfaction Decreases of More Than 5% Since 2019

Q1. Overall Satisfaction with Village of Pinehurst Services by Major Category - 2020, 2019 & 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 (2020 - Pinehurst, NC)

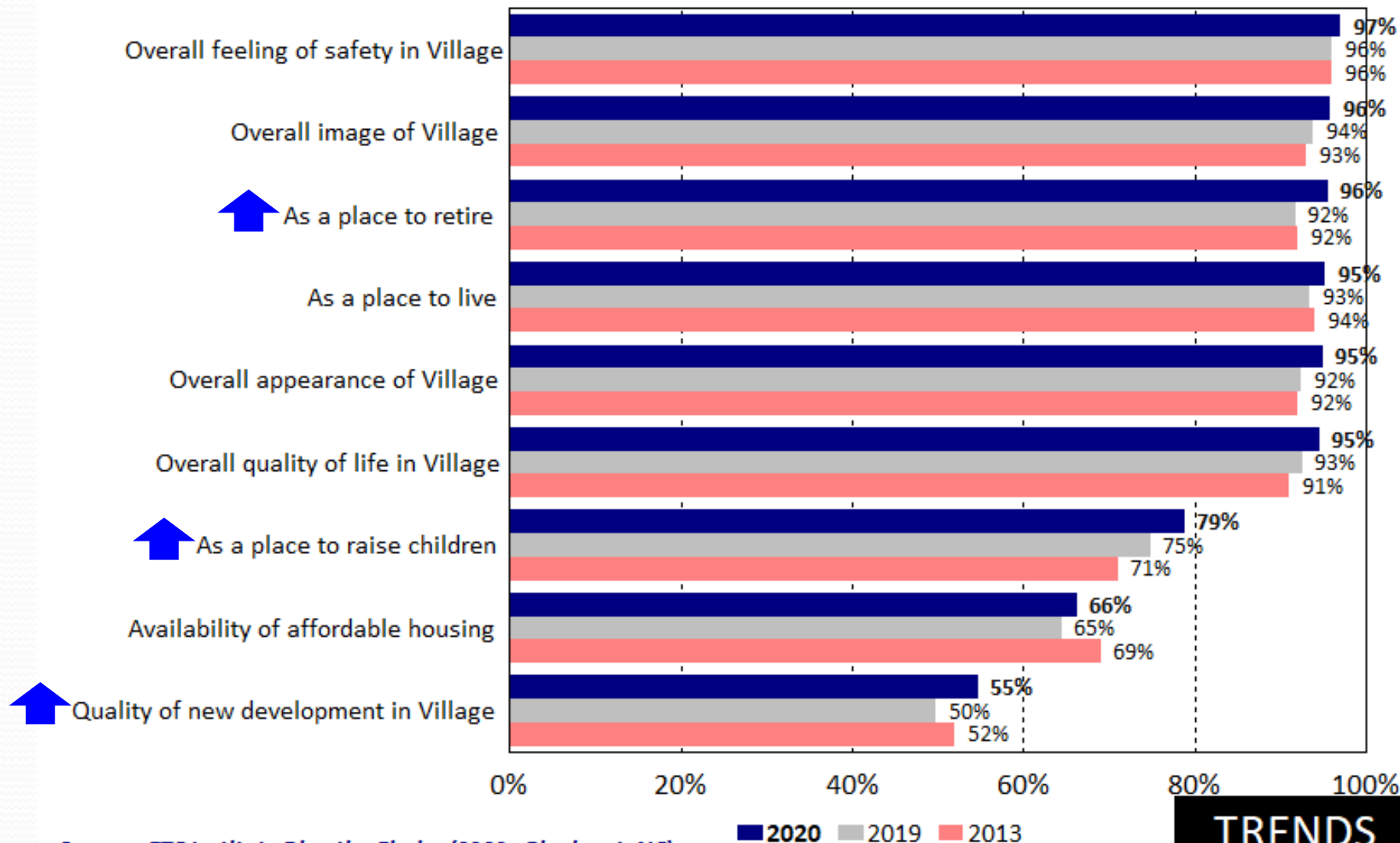
TRENDS

Significant Increases From 2019: ↑

Significant Decreases From 2019: ↓

Q4. Perception Residents Have of Pinehurst as a Community 2020, 2019 & 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 (2020 - Pinehurst, NC)

TRENDS

Significant Increases From 2019: ↑

Significant Decreases From 2019: ↓

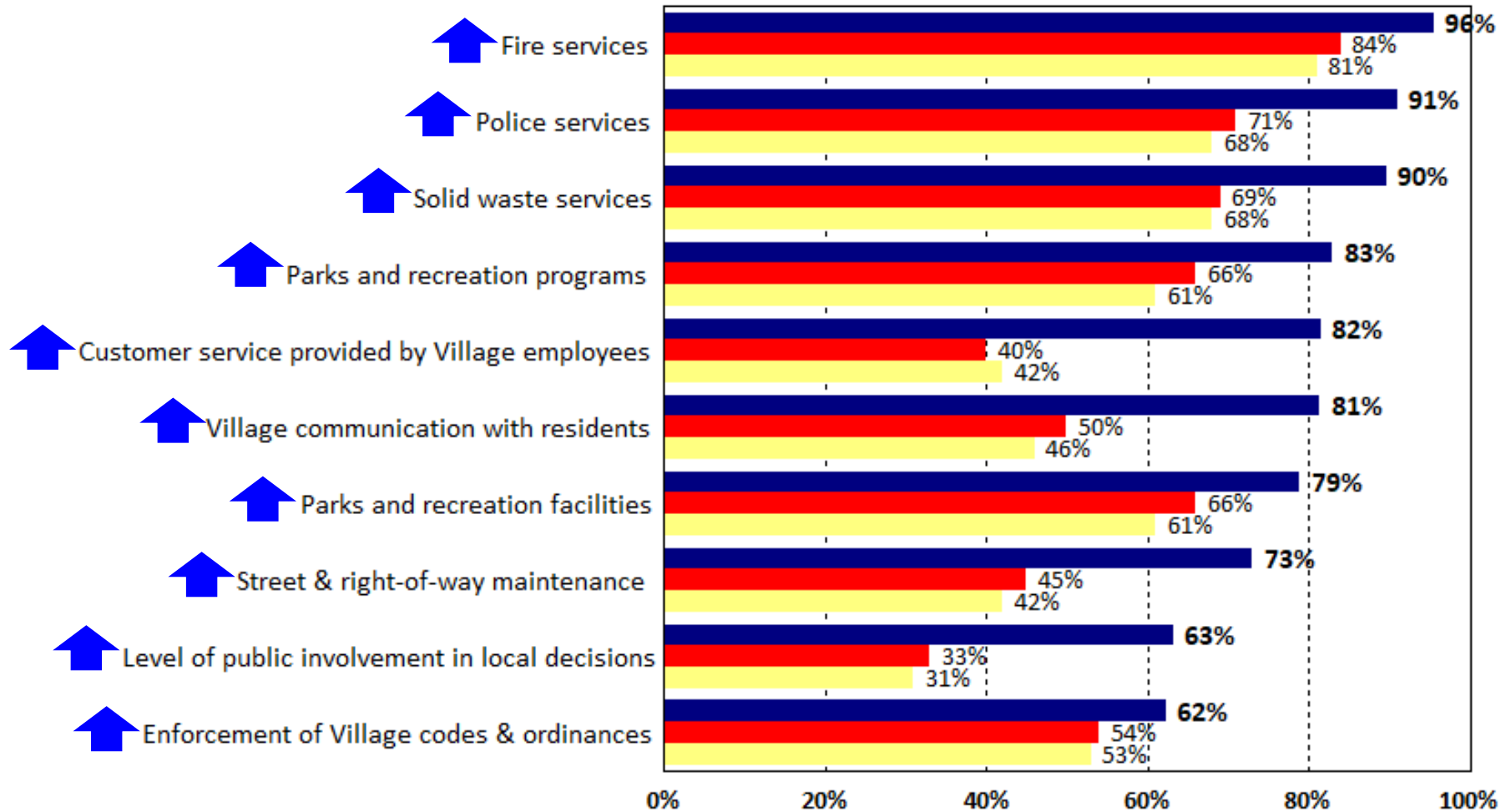
Major Finding #3

**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 (2020 - Pinehurst, NC)

■ Pinehurst ■ Atlantic Region ■ U.S.

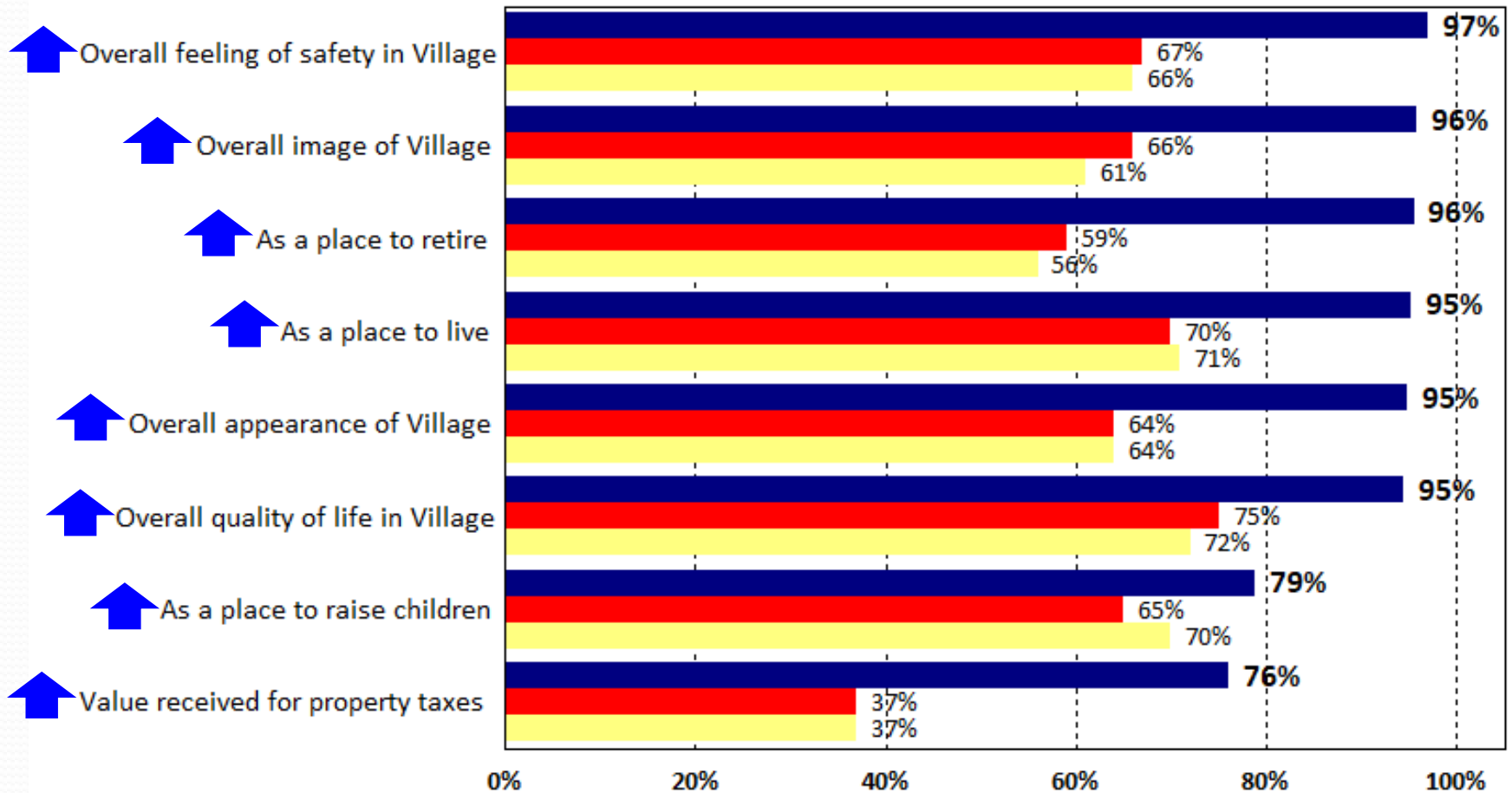
Significantly Higher: ↑

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 (2020 - Pinehurst, NC)

■ Pinehurst ■ Atlantic Region ■ U.S.

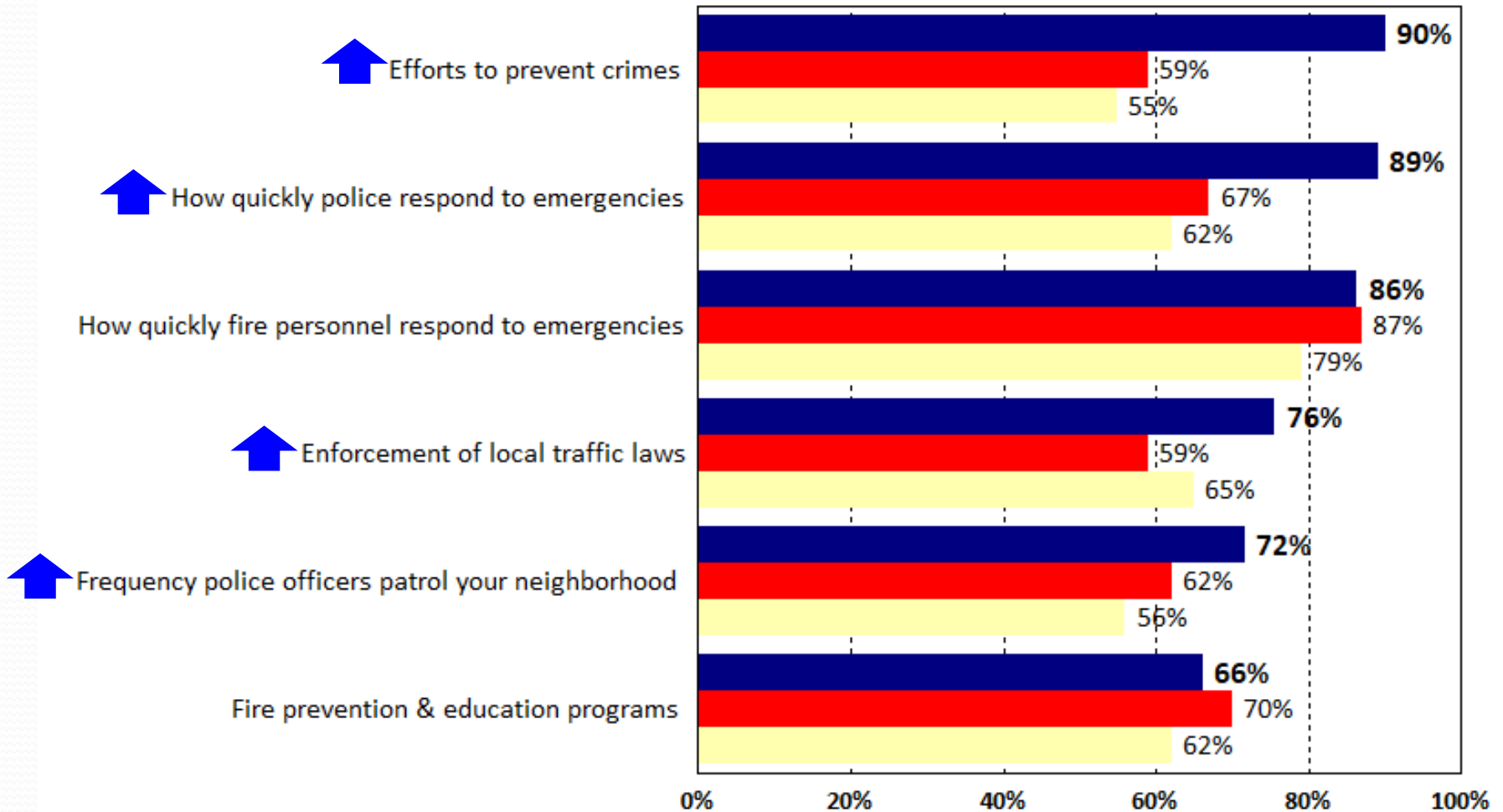
Significantly Higher: ↑

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 (2020 - Pinehurst, NC)

■ Pinehurst ■ Atlantic Region ■ U.S.

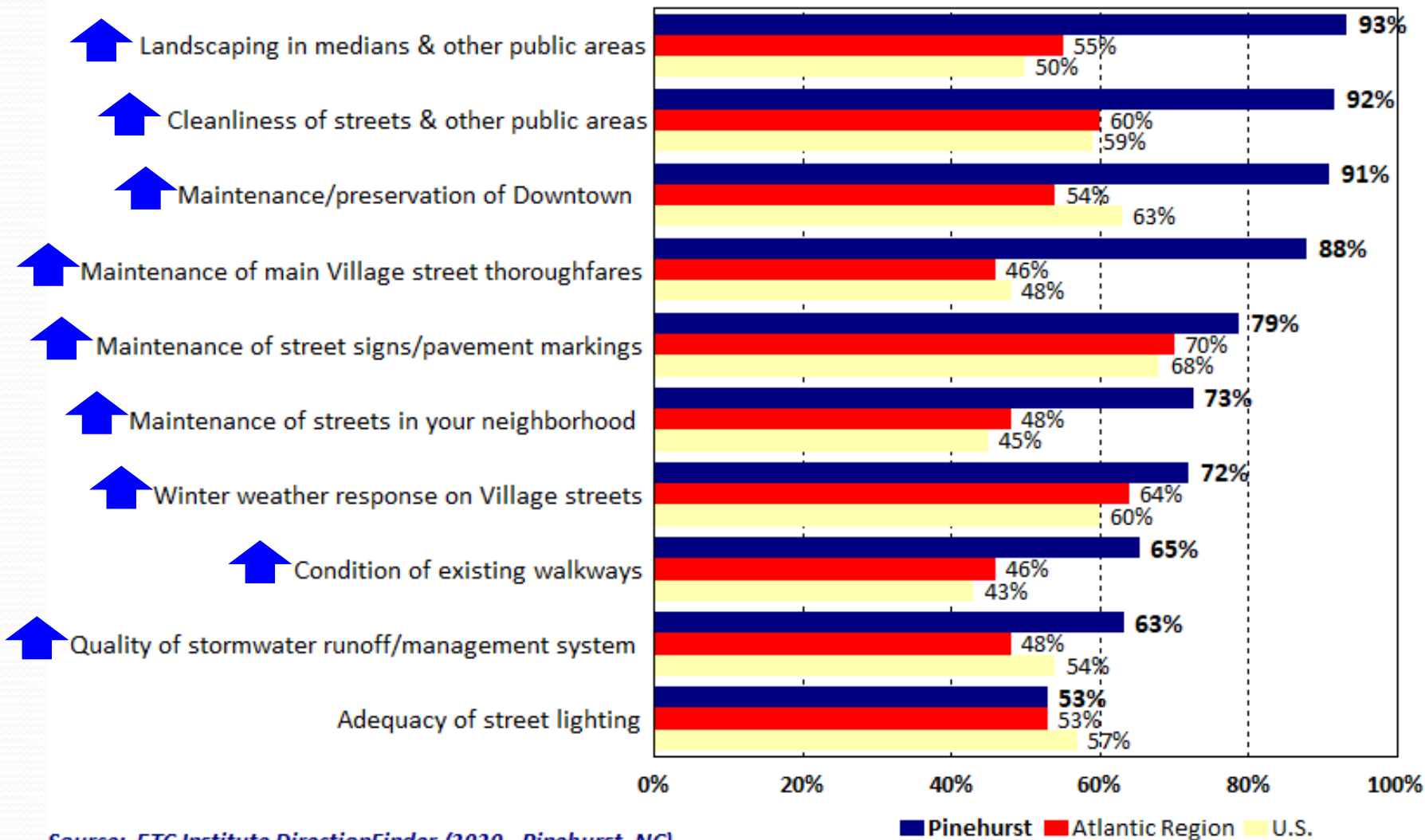
Significantly Higher: ↑

Significantly Lower: ↓

Overall Satisfaction with Transportation/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 (2020 - Pinehurst, NC)

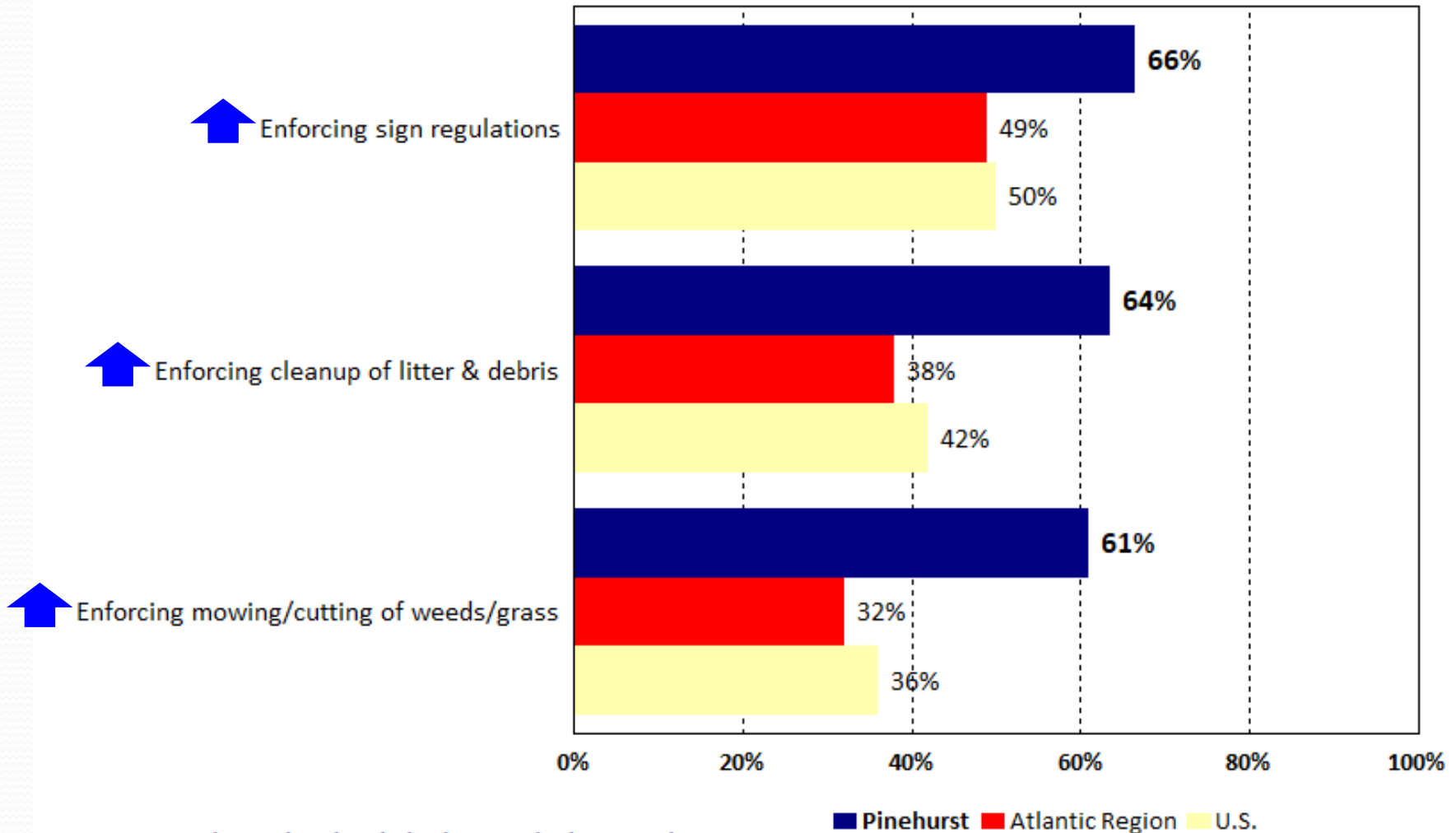
Significantly Higher: ↑

Significantly Lower: ↓

Overall Satisfaction with Code Enforcement

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 (2020 - Pinehurst, NC)

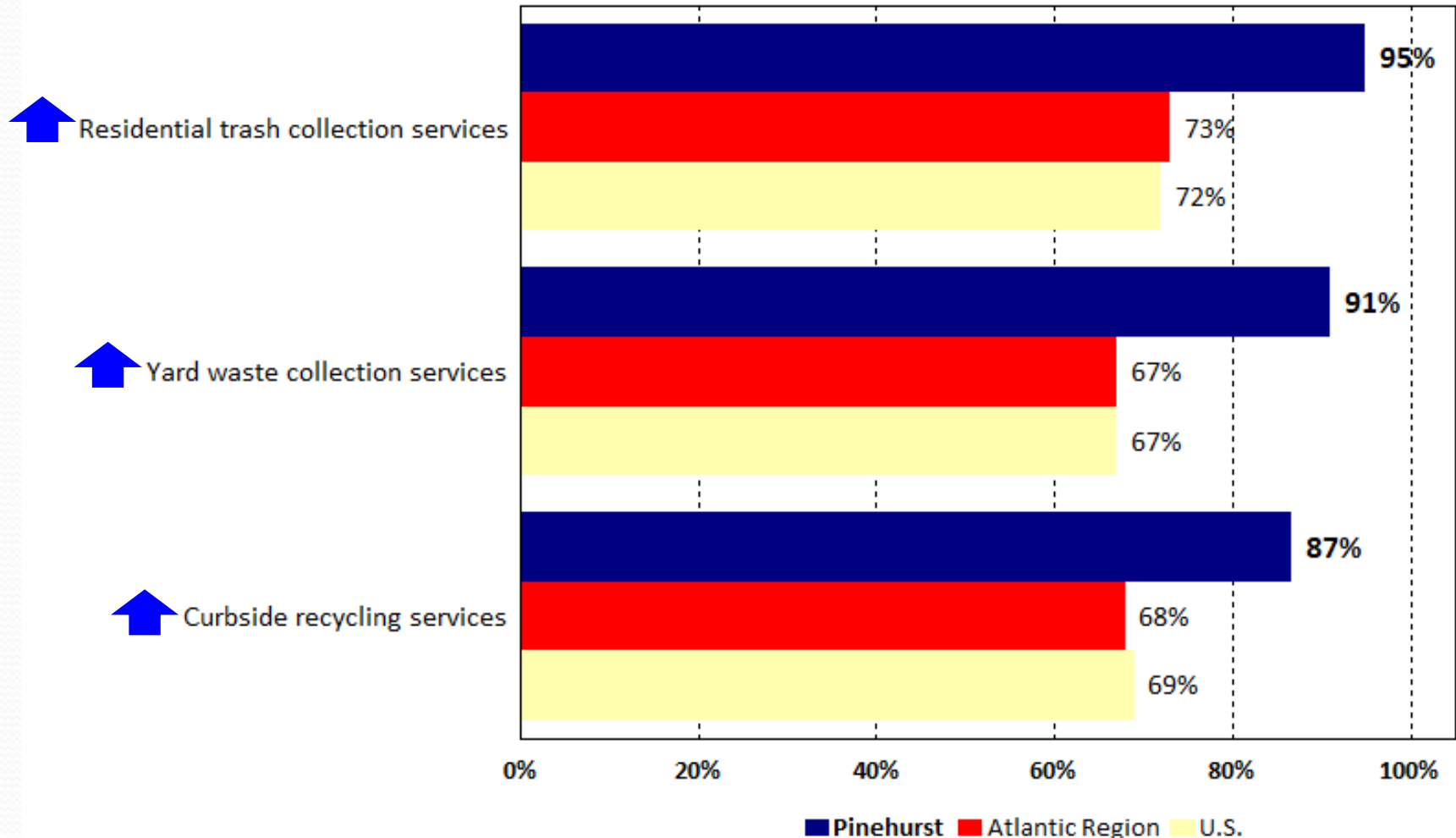
Significantly Higher: 

Significantly Lower: 

Overall Satisfaction with Solid Waste 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 (2020 - Pinehurst, NC)

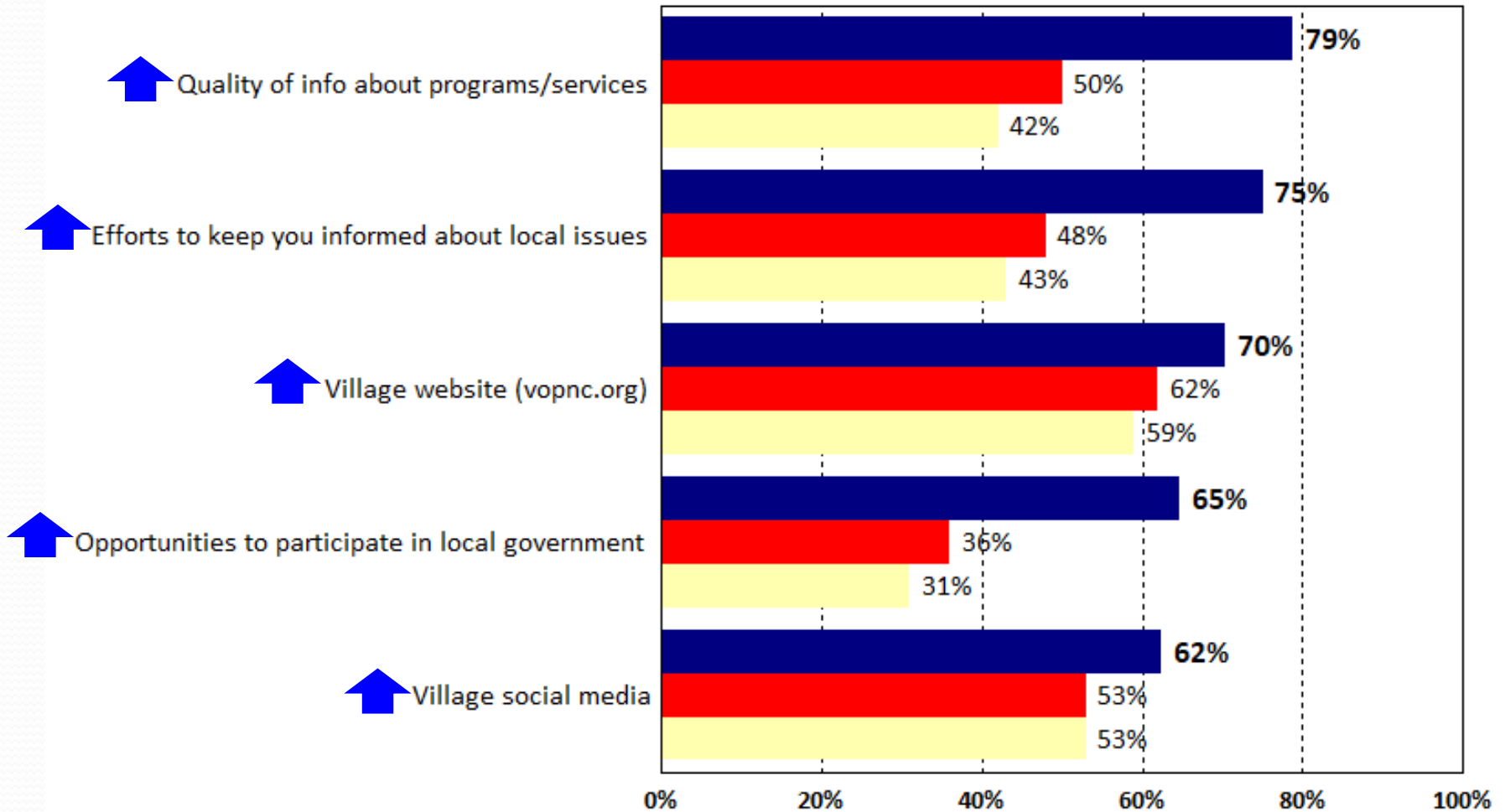
Significantly Higher: 

Significantly Lower: 

Overall Satisfaction with Communication

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 (2020 - Pinehurst, NC)

■ Pinehurst ■ Atlantic Region ■ U.S.

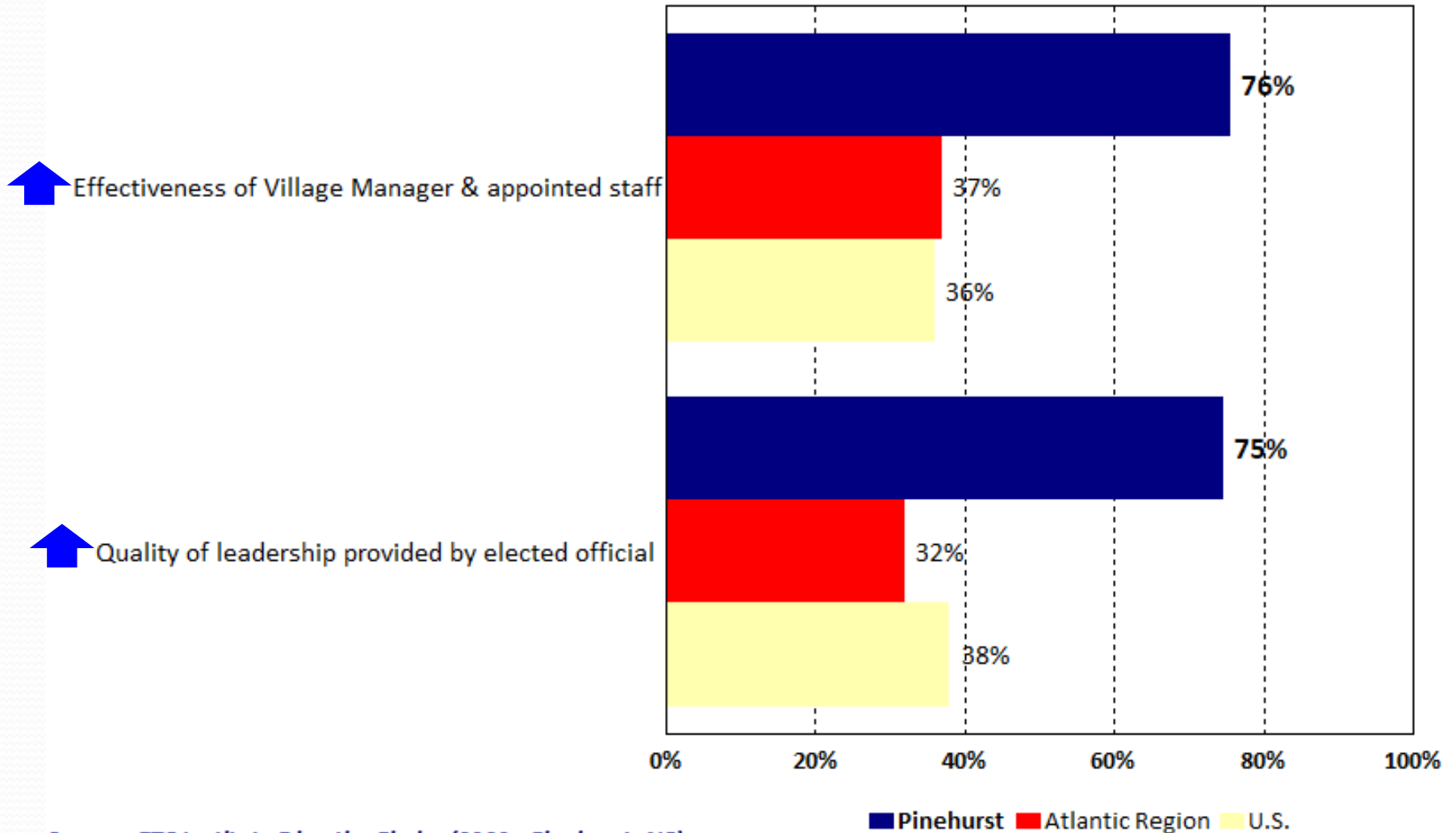
Significantly Higher: ↑

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 (2020 - Pinehurst, NC)

Significantly Higher: 

Significantly Lower: 

Major Finding #4

Community Priorities

2020 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
High Priority (IS .10-.20)						
Efforts at maintaining quality of neighborhoods	40%	1	72%	9	0.1116	1
Medium Priority (IS <.10)						
Enforcement of Village codes & ordinances	29%	4	62%	12	0.1090	2
Street & right-of-way maintenance	35%	3	73%	8	0.0932	3
Level of public involvement in local decisions	20%	6	63%	11	0.0747	4
Promotion of natural resource conservation	18%	7	65%	10	0.0618	5
Police services	40%	2	91%	2	0.0356	6
Parks & recreation facilities	13%	10	79%	7	0.0279	7
Village communication with residents	15%	8	81%	6	0.0277	8
Parks & recreation programs	13%	11	83%	4	0.0213	9
Solid waste services	14%	9	90%	3	0.0144	10
Fire services	23%	5	96%	1	0.0103	11
Customer service provided by Village employees	5%	12	82%	5	0.0089	12

Overall Priorities: 

2020 Importance-Satisfaction Rating

Village of Pinehurst, North Carolina

Overall Satisfaction with Transportation Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Very High Priority (IS >.20)						
Ease of travel on NC Highway 5	52%	1	34%	10	0.3457	1
Ease of travel through the large traffic circle	40%	2	43%	9	0.2269	2
High Priority (IS .10-.20)						
Adequacy of street lighting	32%	3	53%	7	0.1507	3
Availability of walkways	30%	5	52%	8	0.1439	4
Medium Priority (IS <.10)						
Maintenance of streets in your neighborhood	32%	4	73%	4	0.0863	5
Ease of golf cart travel	9%	9	59%	6	0.0378	6
Condition of existing walkways	10%	8	65%	5	0.0350	7
Maintenance of street signs/pavement markings	13%	7	79%	3	0.0271	8
Maintenance of main Village street thoroughfares	22%	6	88%	1	0.0271	9
Ease of travel on other streets in the Village	7%	10	81%	2	0.0130	10

Transportation Priorities: 

2020 Importance-Satisfaction Rating Village of Pinehurst, North Carolina Overall Satisfaction with Public Services

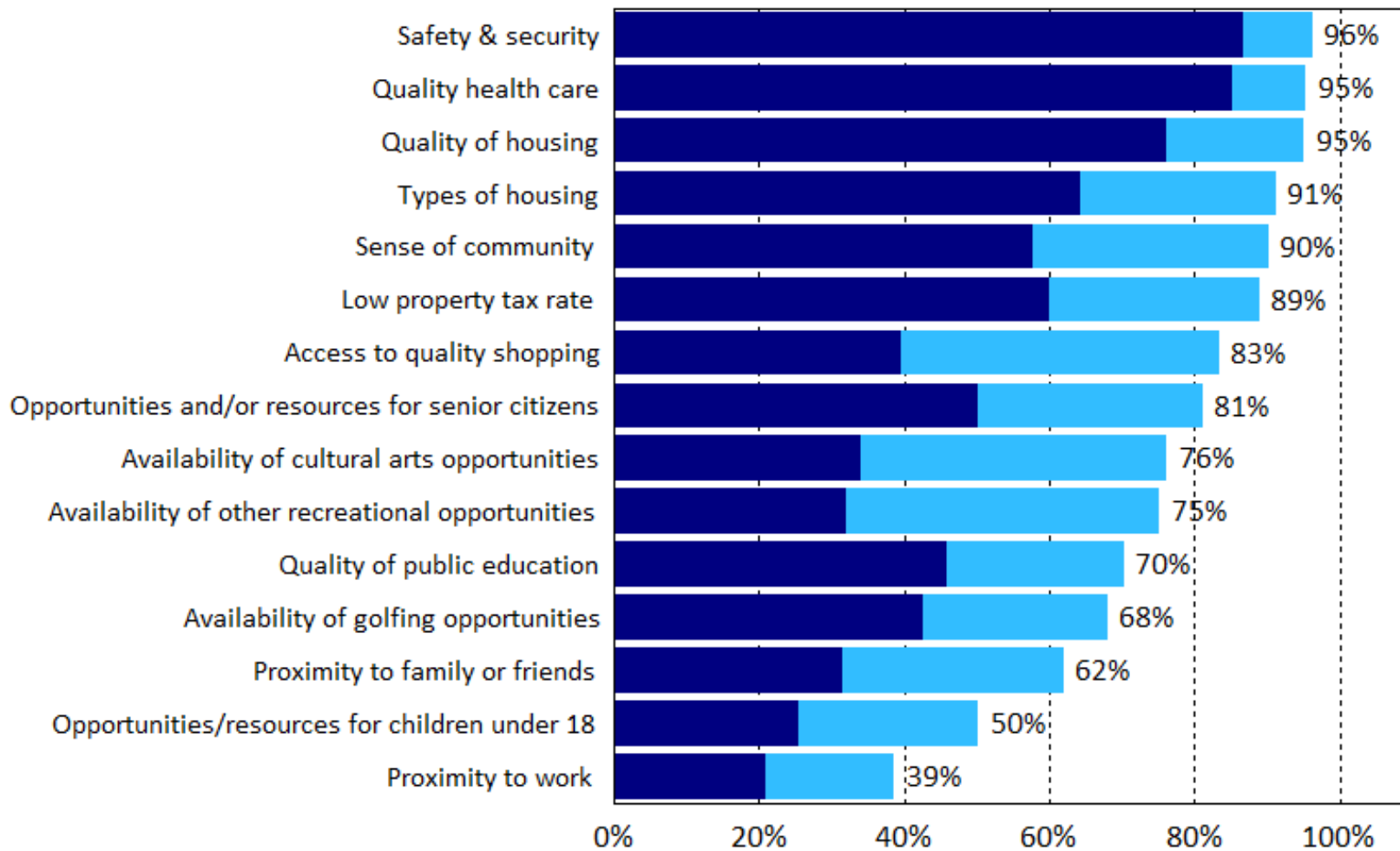
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS .10-.20)						
Quality of stormwater runoff/management system	41%	1	63%	5	0.1497	1
Medium Priority (IS <.10)						
Winter weather response on Village streets	25%	5	72%	4	0.0700	2
Cleanliness of streets & other public areas	41%	2	92%	2	0.0342	3
Maintenance/preservation of Downtown	33%	3	91%	3	0.0301	4
Landscaping in medians/other public areas	26%	4	93%	1	0.0172	5

Public Service Priorities: 

Other Findings

Q3a. Level of Importance of Various Reasons for Choosing to Live in Pinehurst

by percentage of respondents who rated the item as a 1 to 4 on a 4-point scale



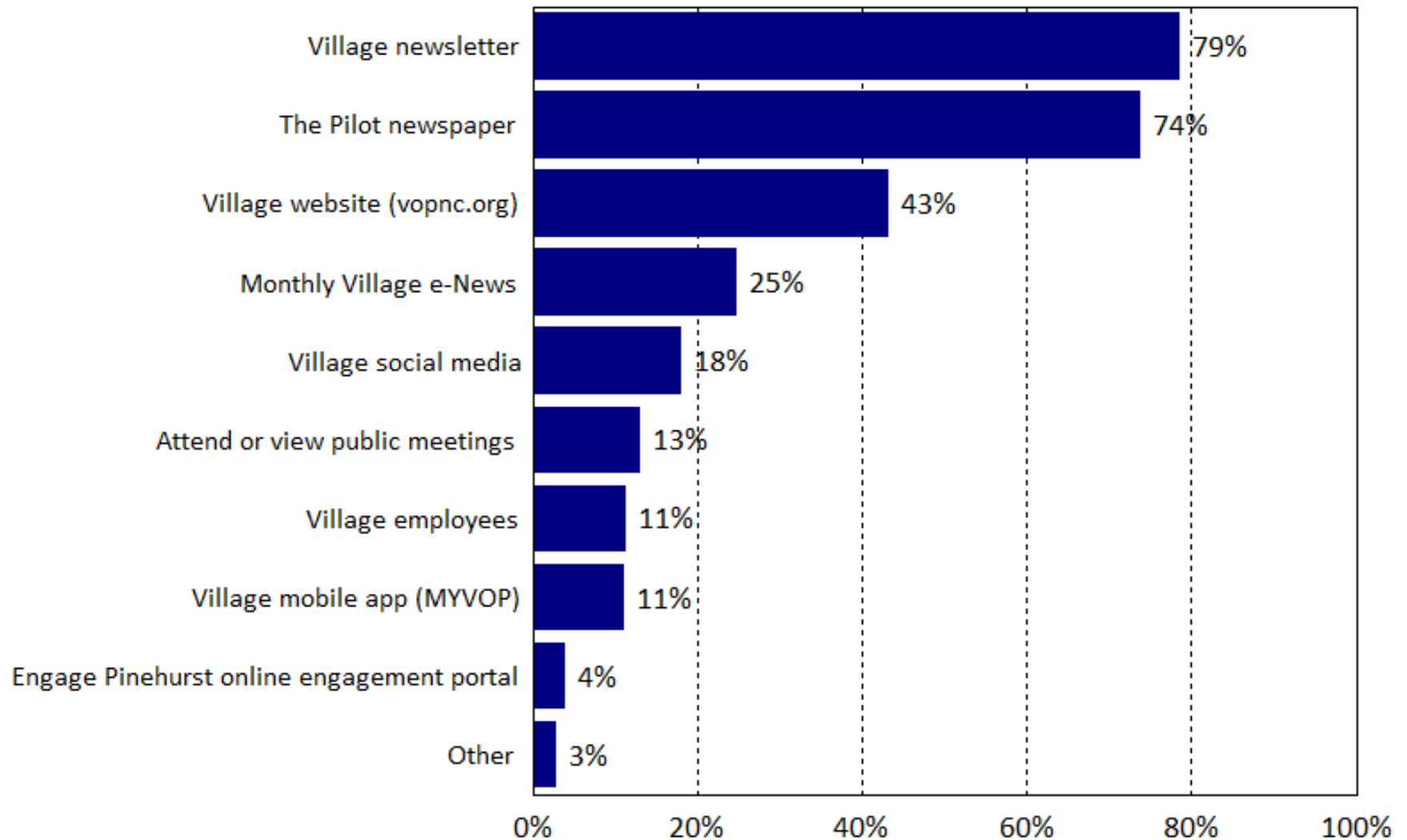
Source: ETC Institute DirectionFinder (2020 - Pinehurst, NC)

Very Important (4) Somewhat Important (3)

Most Important Reasons Residents Live in Pinehurst Are Safety and Security, Quality Health Care, and Housing

Q22. Which of the following do you use to get information about the Village of Pinehurst?

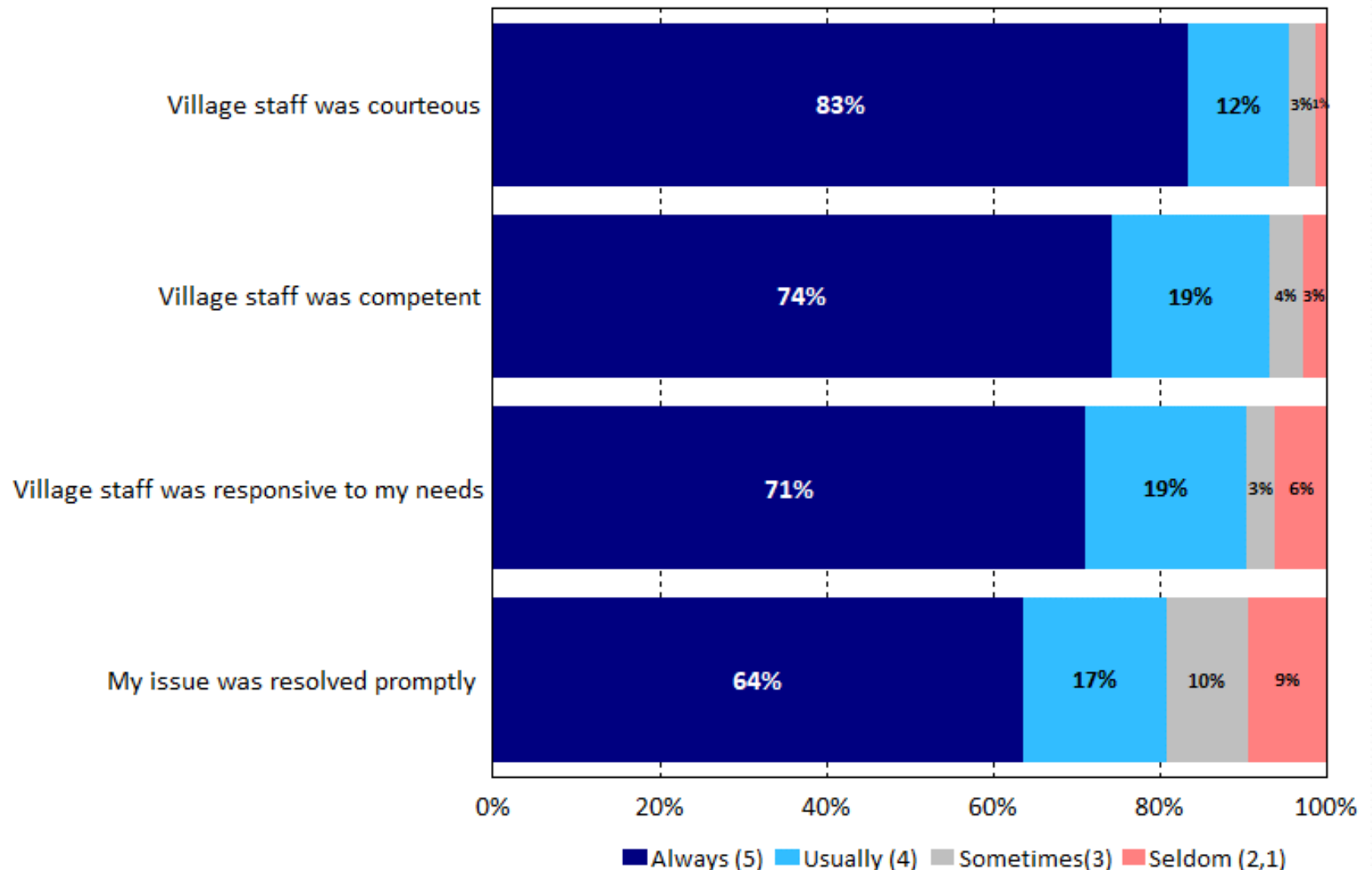
by percentage of respondents (multiple selections could be made)



Source: ETC Institute DirectionFinder (2020 - Pinehurst, NC)

Q24a-d. Rating Your Experience with Village Employees

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

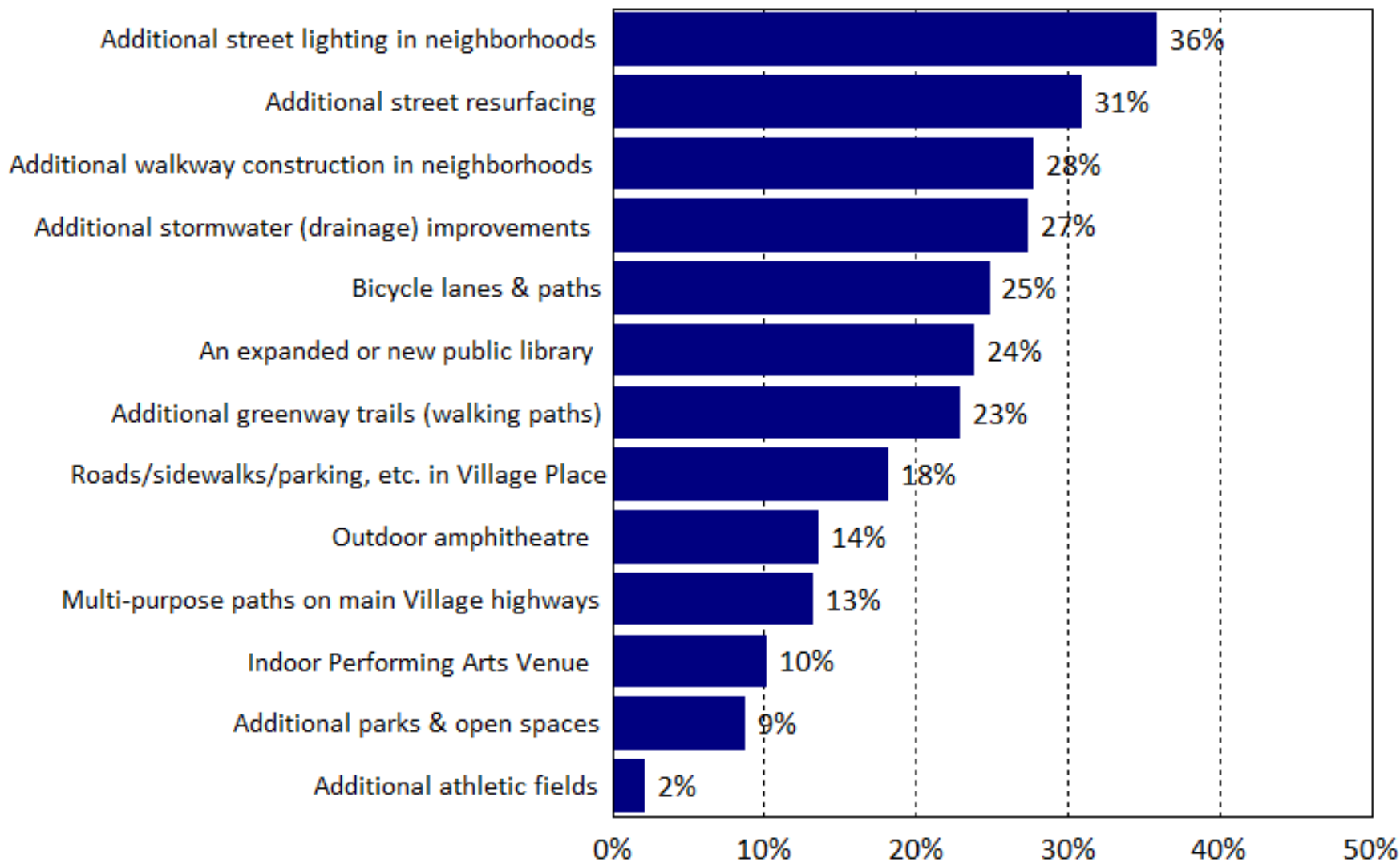


Source: ETC Institute DirectionFinder (2020 - Pinehurst, NC)

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

Q25. Community Improvements That Residents Feel Are Most Important

by percentage of respondents (3 selections could be made)



Source: ETC Institute DirectionFinder (2020 - Pinehurst, NC)

Summary

Summary

- **Residents Have a Very Positive Perception of the Village**
 - ❑ 95% rated Pinehurst as excellent or good place to live
 - ❑ 95% would recommend Pinehurst to others as a place to live
- **The Village Is Moving in the Right Direction**
 - ❑ Satisfaction ratings have increased or stayed the same in 64 of 86 areas since 2019, and 69 of 80 areas since 2013
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Questions?

THANK YOU!!