

Village of Pinehurst Business Survey

Findings Report

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2020

Submitted to the Village of Pinehurst, North Carolina

By:
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September 2020



2020 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 2020. 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 75 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 Village services that the highest percentage of businesses have used in the past year were: fire inspections (65%), streets and grounds (35%), police patrol (32%), and building inspections.
- **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%), code enforcement (100%), Village Hall (100%), fire inspections (98%), and police patrol (92%).
- **Most Important Village Services.** Based on the sum of the top three choices, areas that businesses rated as the most important were: 1) police patrol (61%), 2) fire emergency response (44%), 3) streets and grounds (40%), and 4) police emergency response (39%).
- **Satisfaction with the Overall Quality of Village Services.** Over half of the businesses surveyed (55%) feel the overall quality of services provided by the Village meets their expectations; 34% feel the overall quality of Village services is higher or significantly higher than their expectations. Only 3% feel the overall quality of Village services is below their expectations.
- **Satisfaction with Various Village Services.** Most (90%) 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 historic preservation efforts.
- **Perceptions of the Village.** Nearly all (99%) of the businesses surveyed *who had an opinion* indicated that they were satisfied with the overall feeling of safety in the Village; 93% were satisfied with the overall quality of life, and 90% were satisfied with the overall image of the Village.
- **Likelihood of Recommending the Village as a Business Location.** Three-fourths (75%) of businesses would be very likely or likely to recommend the Village as a business location to friends, family and co-workers; 16% would be somewhat likely to recommend the Village as a business location to friends, family and co-workers, and only 9% would not be likely to recommend the Village as a business location.
- **Business Atmosphere Compared to Two Years Ago.** Twenty-nine percent (29%) of businesses feel the overall business atmosphere in the Village is better than two years ago; 40% feel there has been no change, but the atmosphere is good; 8% feel there has been no change, but the atmosphere is poor, and 8% feel the atmosphere is worse.
- **Village Customer Service.** Seventy-two percent (72%) of businesses rated the customer service from the Village as very good or good, compared to only 3% rated the customer service from the Village as poor.

- **Level of Agreement with Statements About Customer Service from Village Staff.** Eighty-six percent (86%) of the businesses surveyed *who had an opinion* agreed that the Village staff was courteous during their most recent interaction with them; 82% agreed that Village staff was competent, 82% also agreed that Village staff was responsive to their needs, and 76% agreed that their issue was resolved promptly.
- **Satisfaction with Village Communications with Businesses.** Over two-thirds (69%) 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 53% of business that visited the Village’s website (www.vopnc.org) during the past 12 months, 83% *who had an opinion* felt the website was easy to navigate, and 75% rated the availability of information on Village services on the website as “very good” or “good”. Overall, 80% of those who have visited the Village’s website indicated they were either “very satisfied” or “satisfied” with the website.
- **Village Mobile App.** Eleven percent (11%) of businesses indicated they used the Village’s mobile app (MY VOP) during the past 12 months; 86% of those who have used it indicated they were “very satisfied” or “satisfied.”
- **Best Ways to Communicate with Businesses.** Seventy-two percent (72%) of businesses indicated that email is one of the most important ways for the Village to communicate with them.
- **Community Development (Codes and Ordinances).** Seventy-one percent (71%) of the businesses *who had an opinion* were satisfied with historic district guidelines; 70% were satisfied with zoning ordinances, and 61% were satisfied with business signage and regulations.
- **Impact of Various Cultural and Entertainment Opportunities.** Sixty-five percent (65%) of the businesses surveyed feel the Holly Arts and Crafts Festival has a positive impact on their business; 59% feel cultural activities have a positive impact on their business; 55% feel parades have a positive impact, and 55% feel the Farmer’s Markets have a positive impact on their business.
- **Satisfaction with the Way the Village handles Events That Attract Large Crowds.** Seventy percent (70%) of businesses are satisfied with the way the Village handles events that attract large crowds, compared to only 5% who are dissatisfied.
- **Reasons Influencing Decision to Locate Business in the Village of Pinehurst.** Eighty-eight percent (88%) 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 quality of life in the Village (84%) and overall image of the Village (79%).



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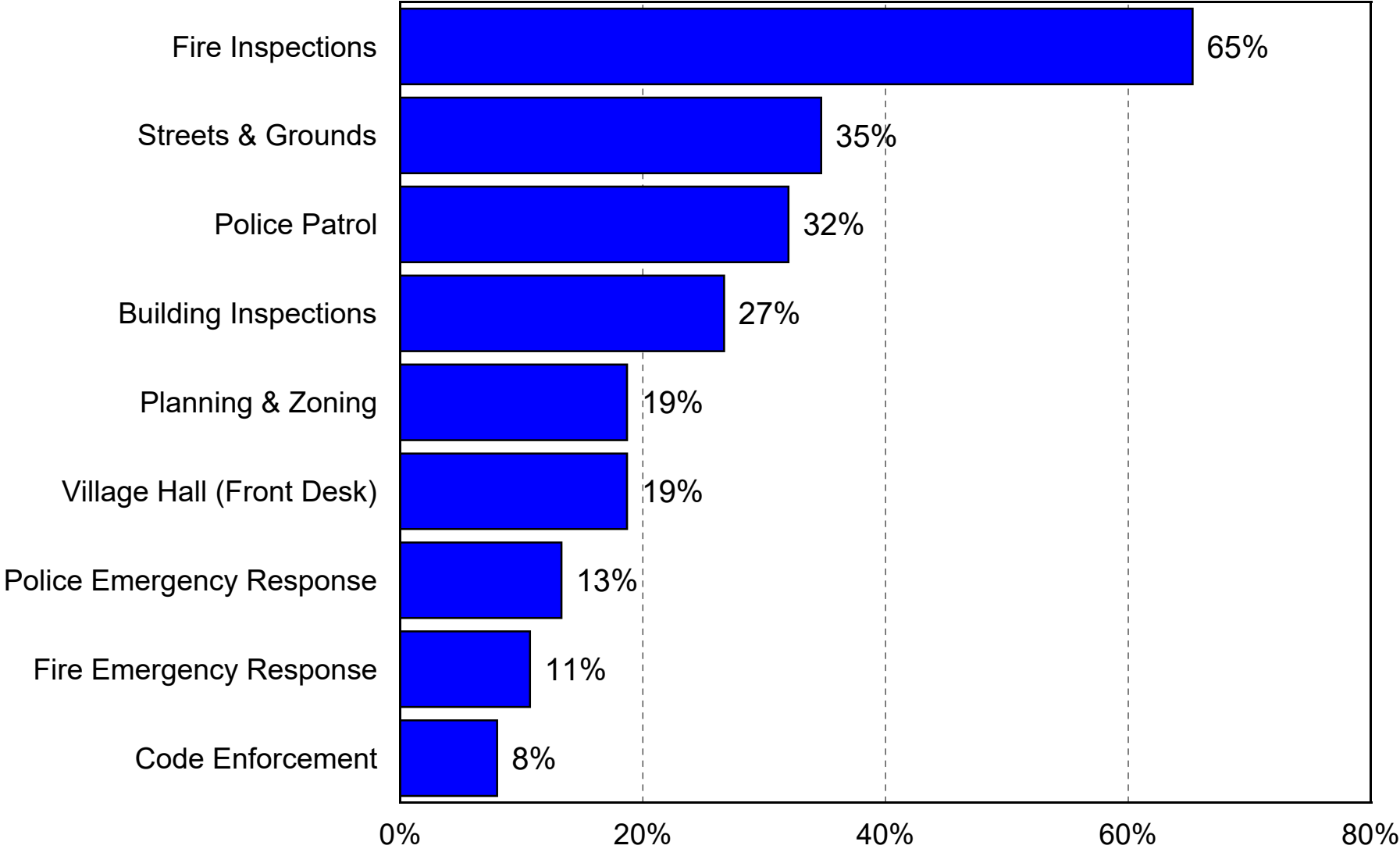
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Section 1

Charts and Graphs

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

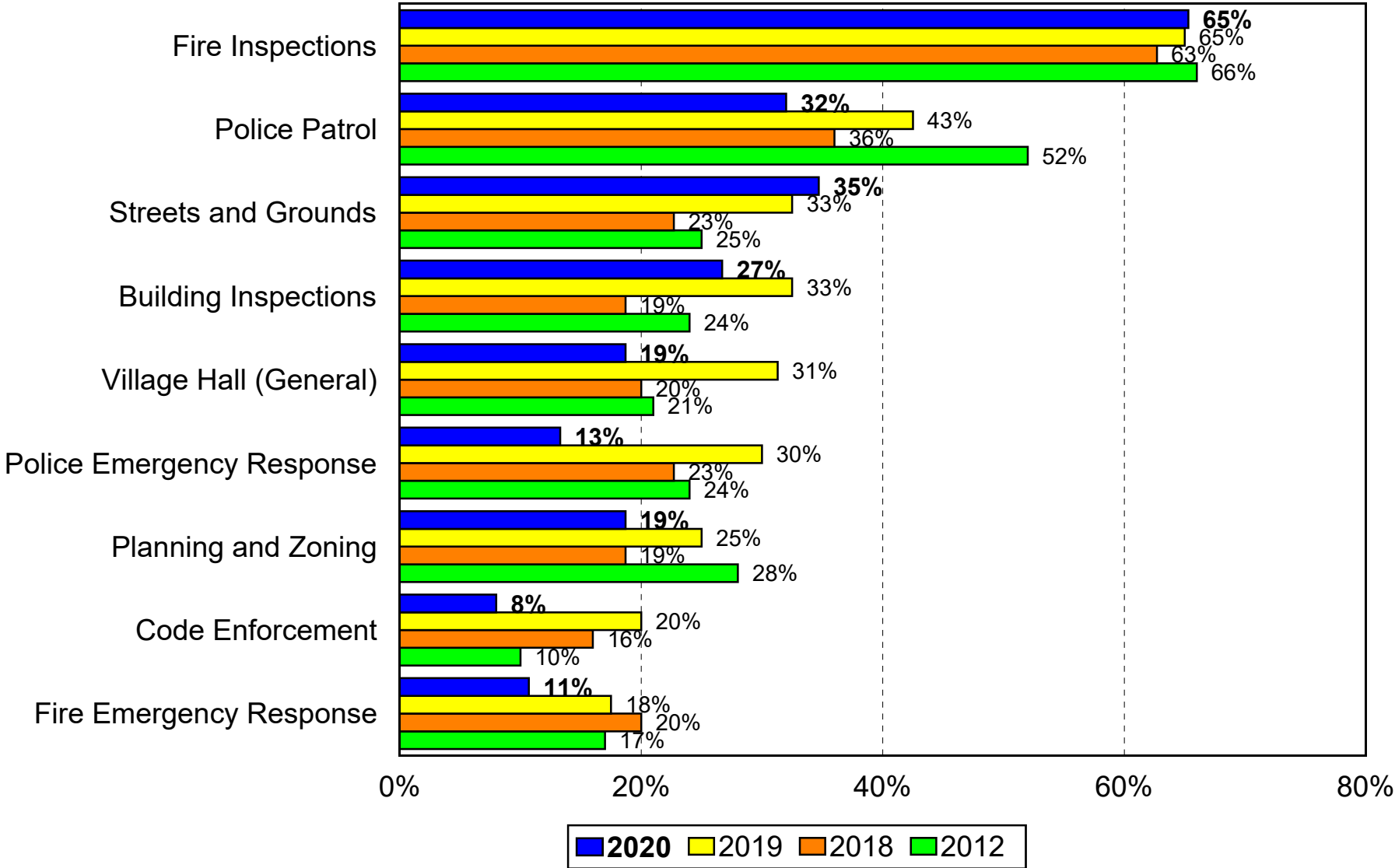
by percentage of respondents who answered “yes”



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q1. Have you used this service or department in the past year? - 2012 to 2020

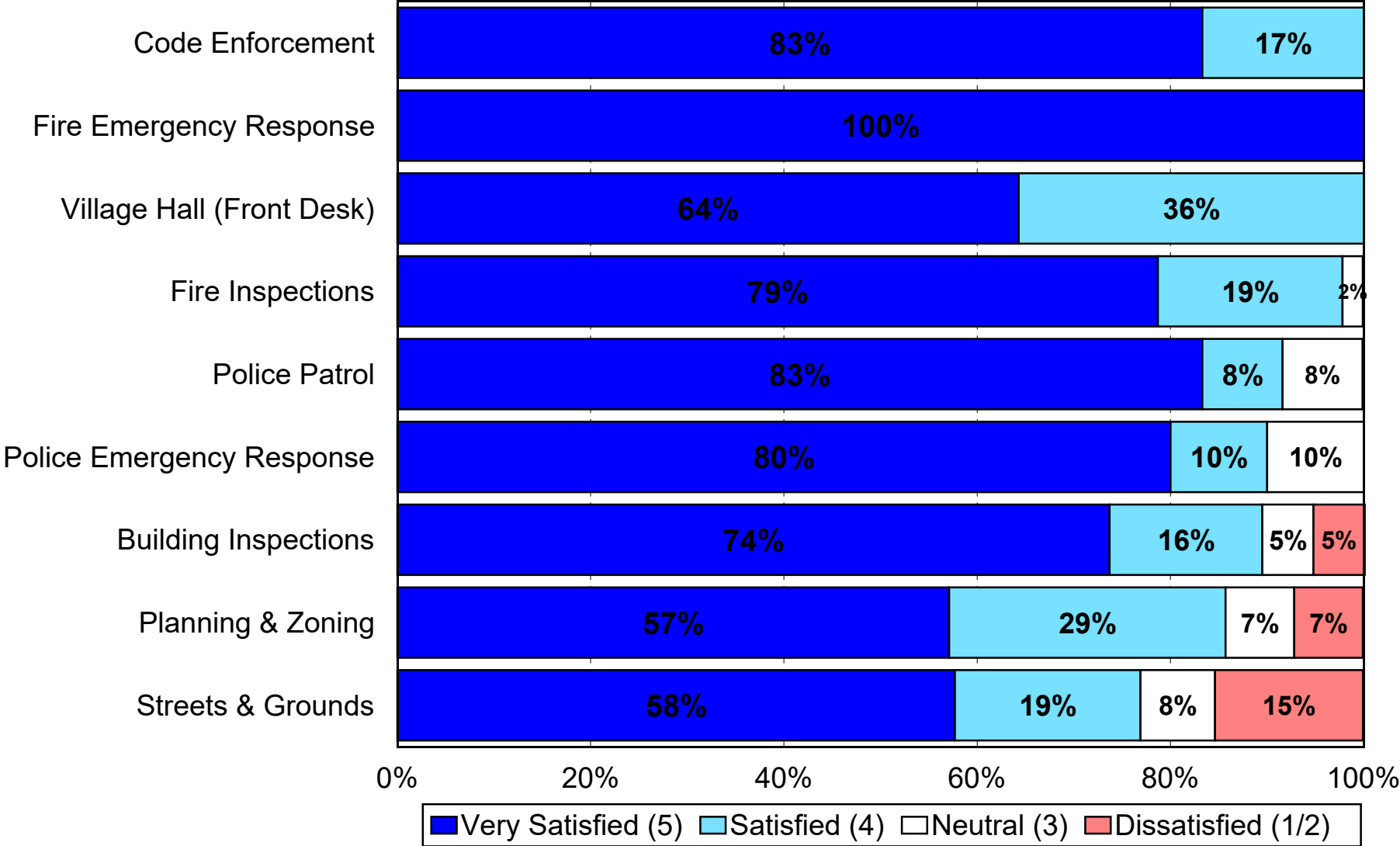
by percentage of respondents who answered “yes”



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

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

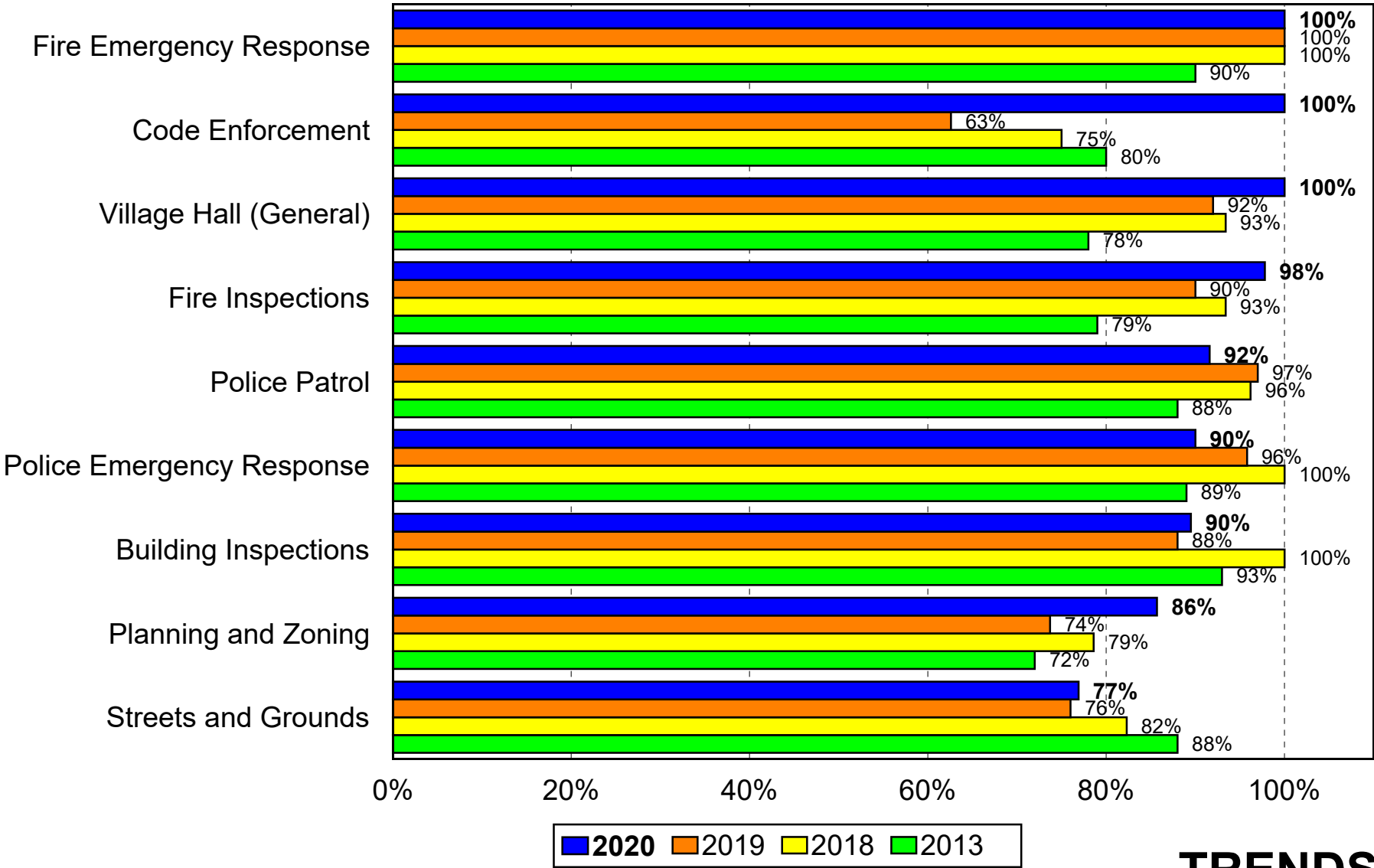
by percentage of respondents who had used the service or department and rated the item as a 1 to 5 on a 5-point scale (excluding “don't know”)



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q1. Overall Satisfaction with Pinehurst Services or Departments Used in the Past Year - 2013 to 2020

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

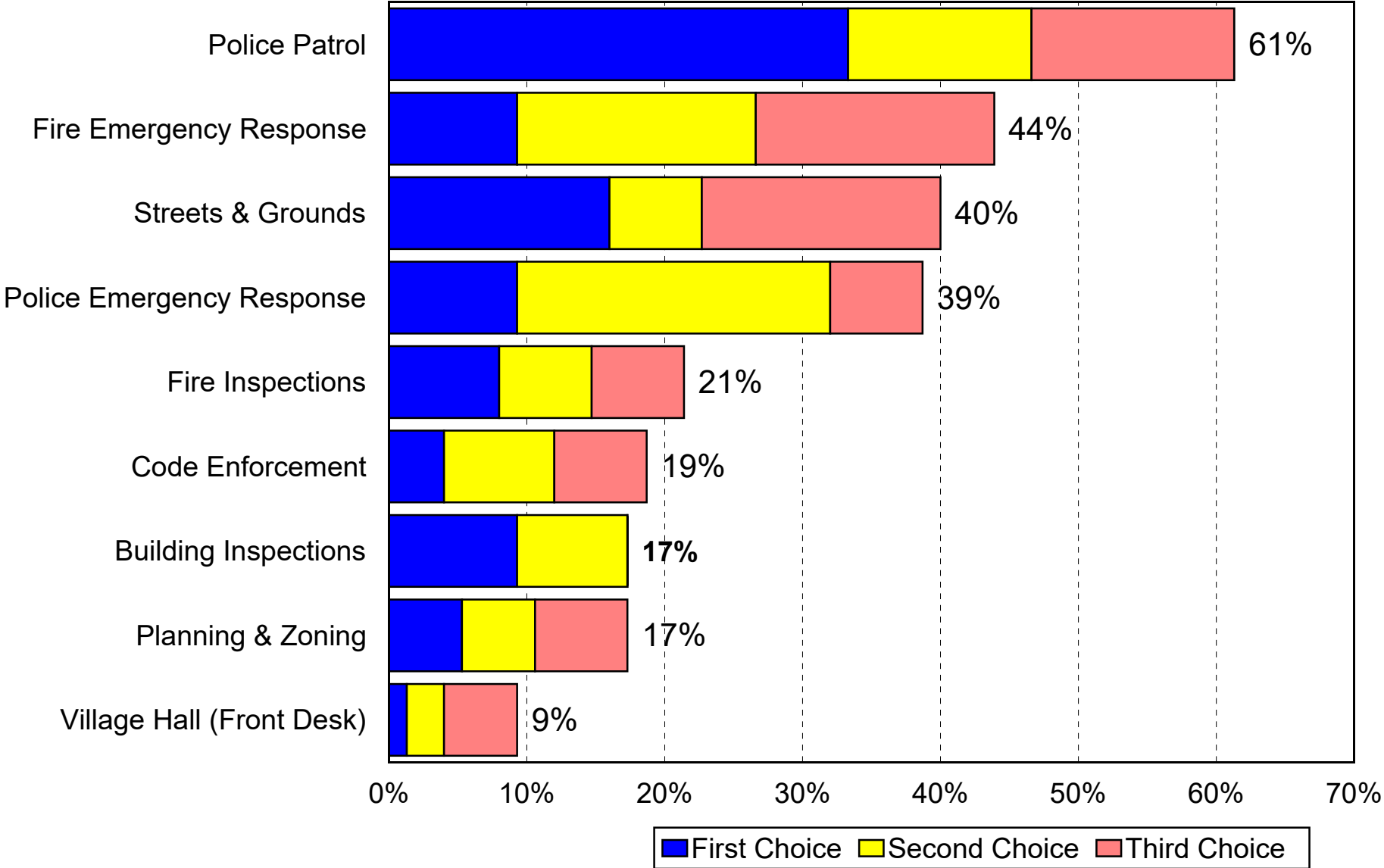


TRENDS

Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

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

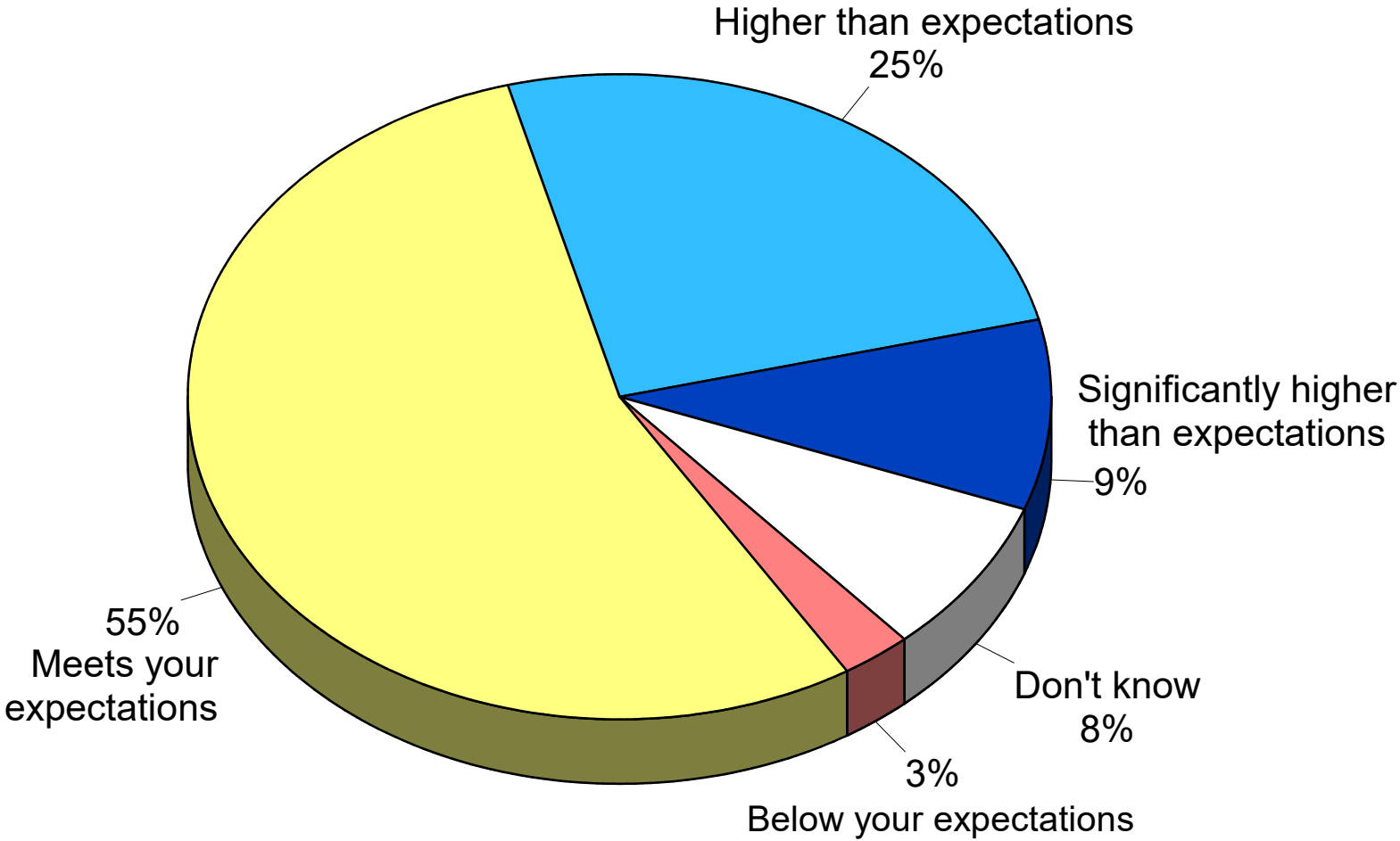
by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

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

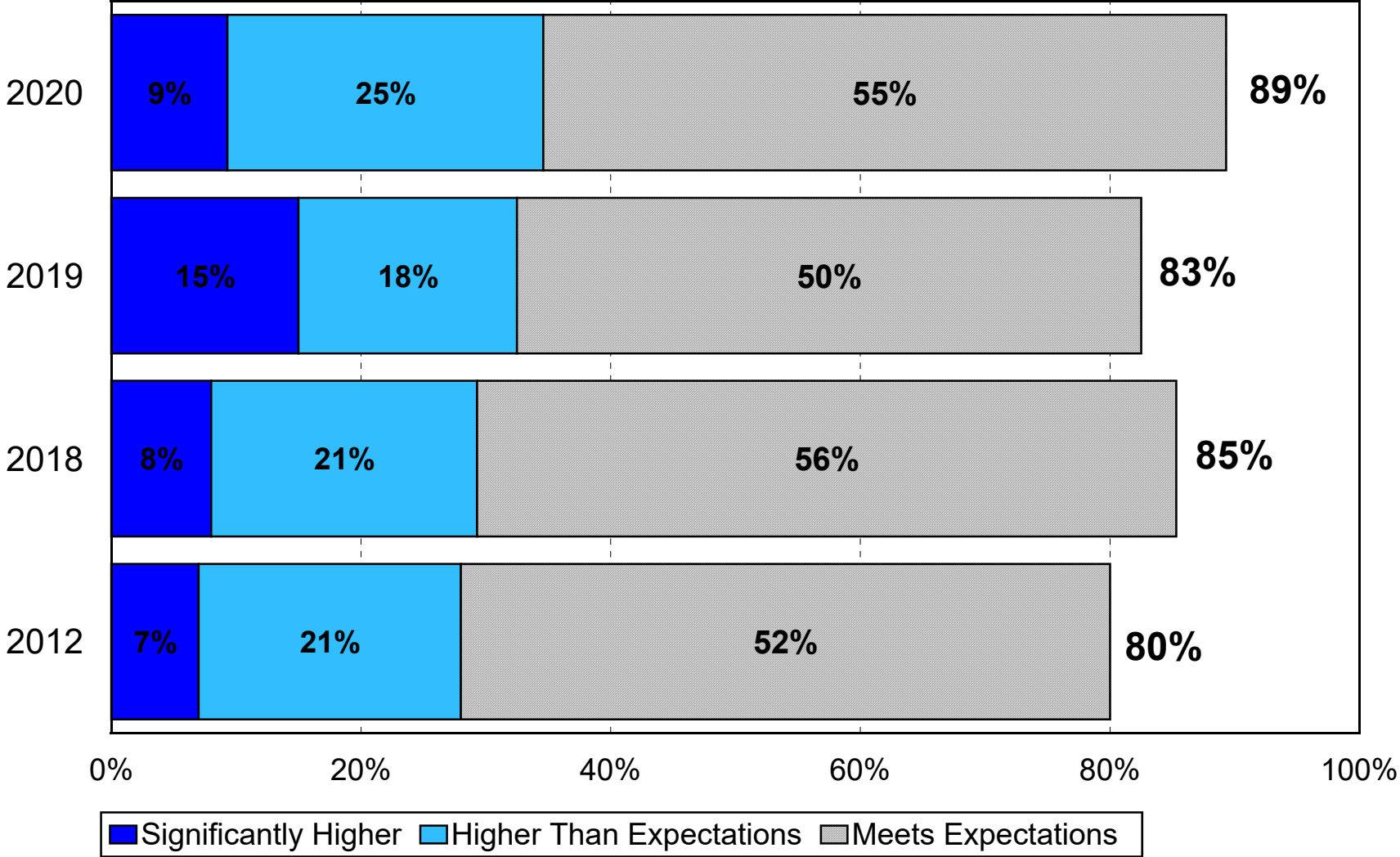
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q3. Satisfaction with the overall quality of services provided to your business by the Village of Pinehurst 2012 to 2020

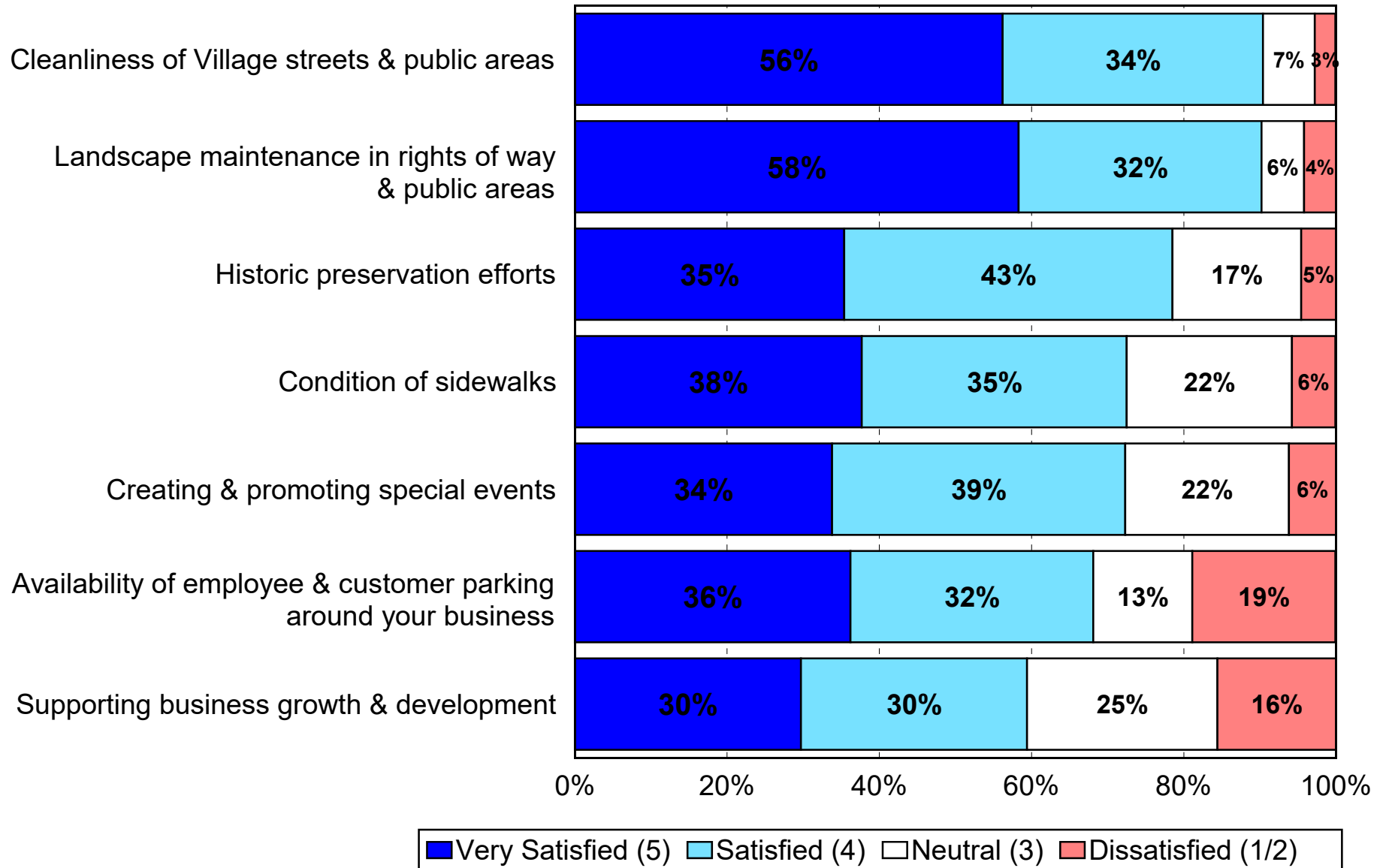
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q4. Level of Satisfaction with the Village in Various Areas

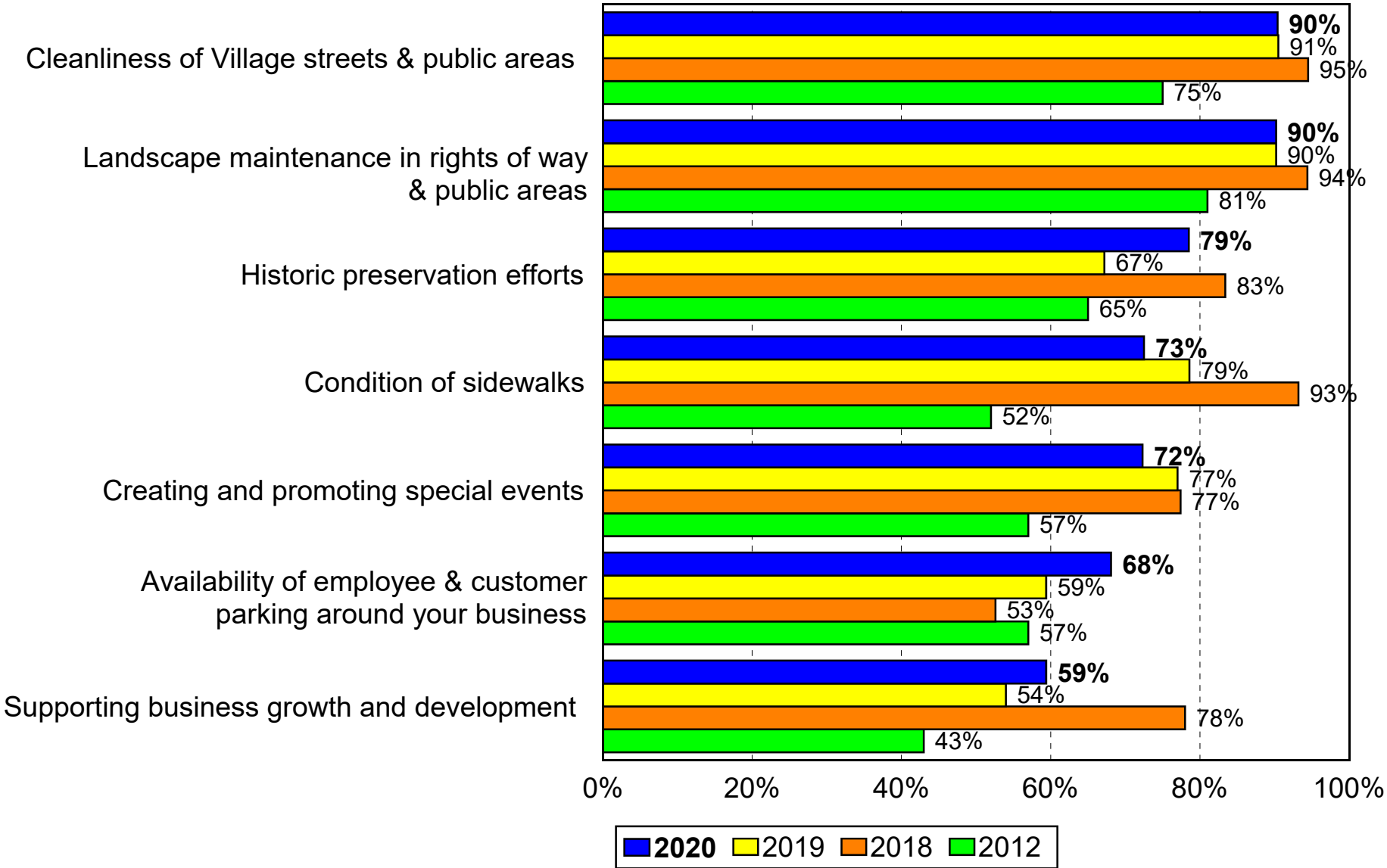
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding “don't know”)



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q4. Level of Satisfaction with the Village in Various Areas 2012 to 2020

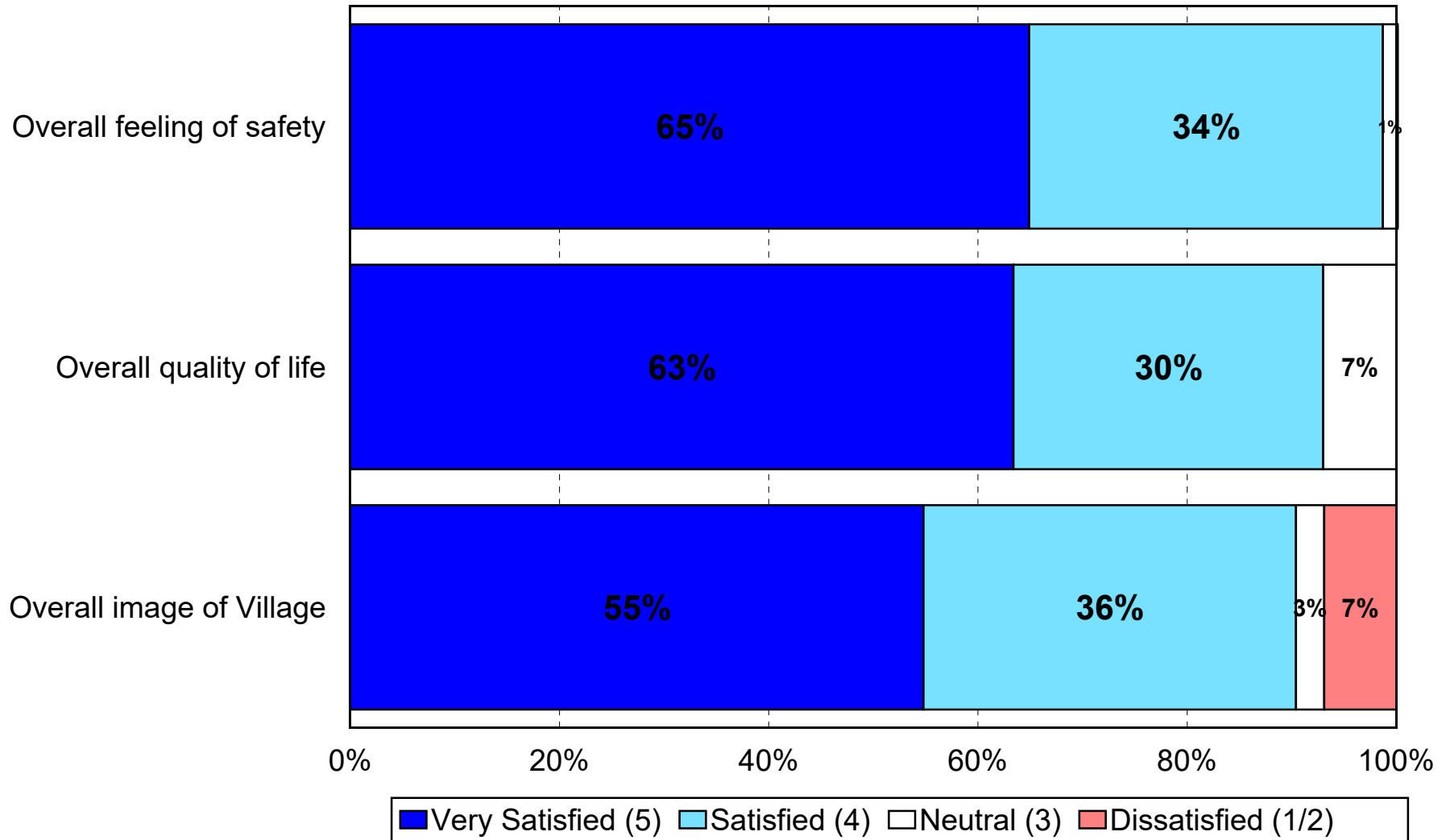
by percentage of respondents who answered “very satisfied” or “satisfied”



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

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

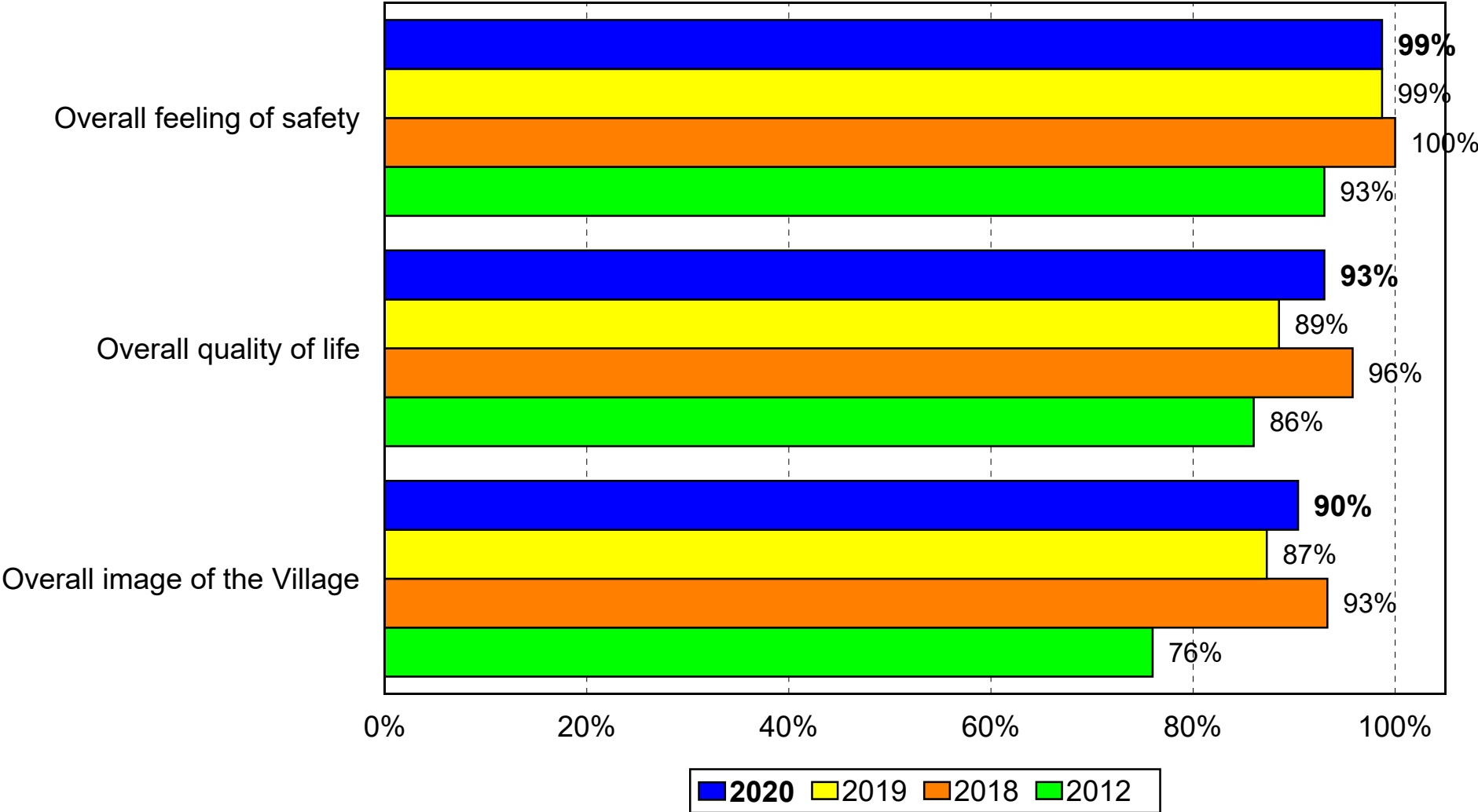
by percentage of respondents who had used the service or department and rated the item as a 1 to 5 on a 5-point scale (excluding "don't know")



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q5. Overall Satisfaction with Various Perceptions of the Village of Pinehurst - 2012 to 2020

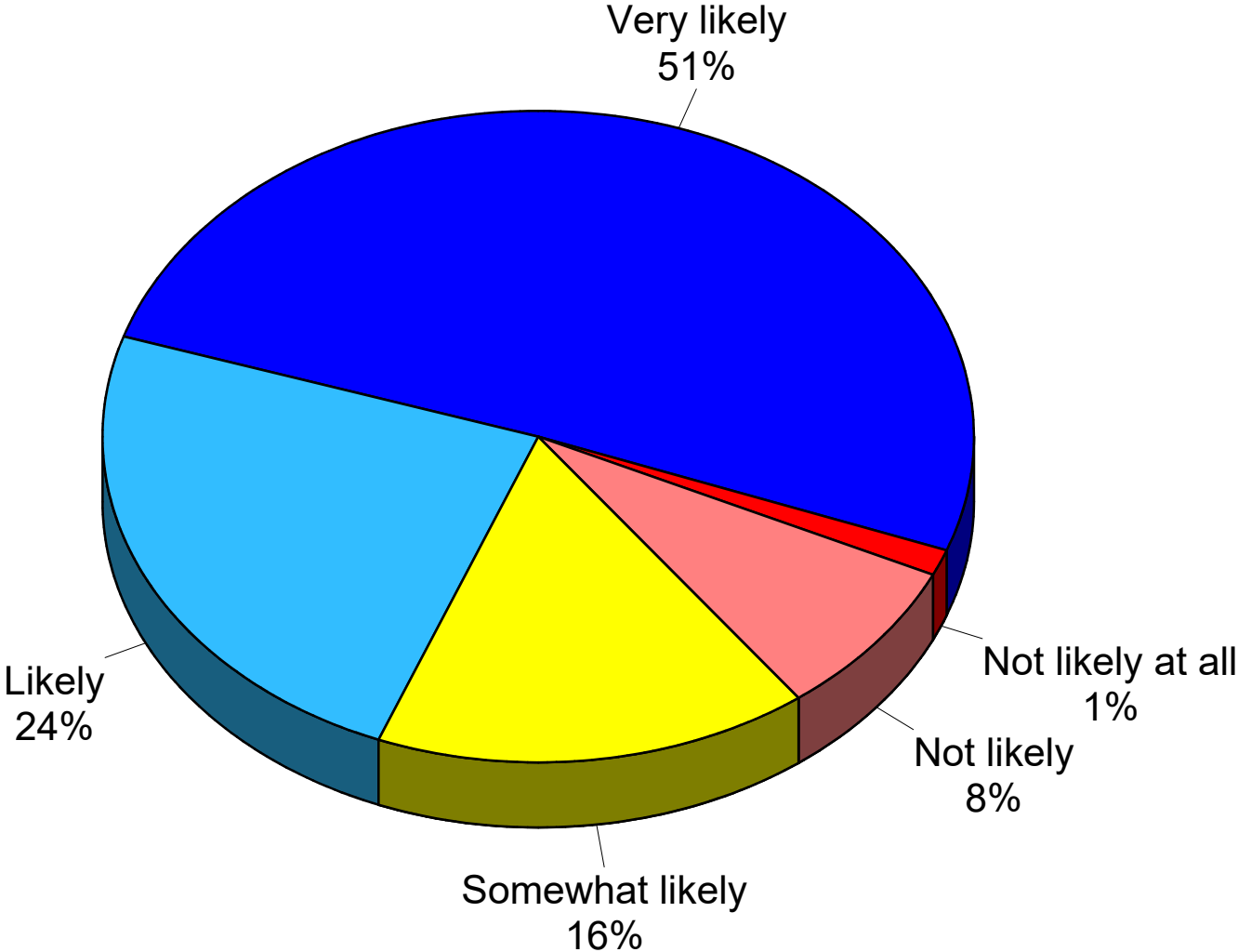
by percentage of respondents who had used the service or department and rated the item as a 4 or 5 on a 5-point scale (excluding “don't know”)



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

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

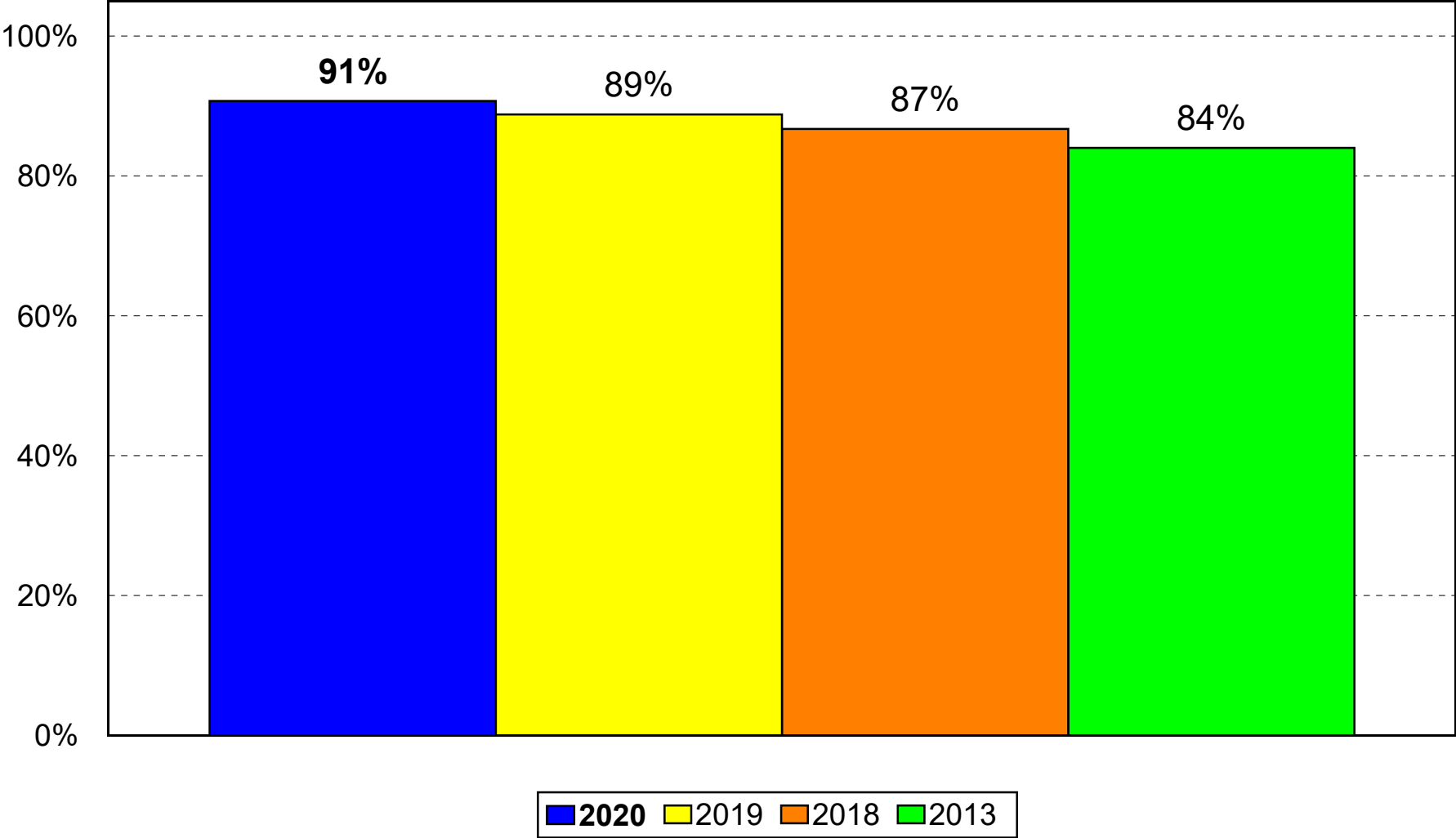
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q6. How likely would you be to recommend the Village as a business location to friends, family, and co-workers? 2013 to 2020

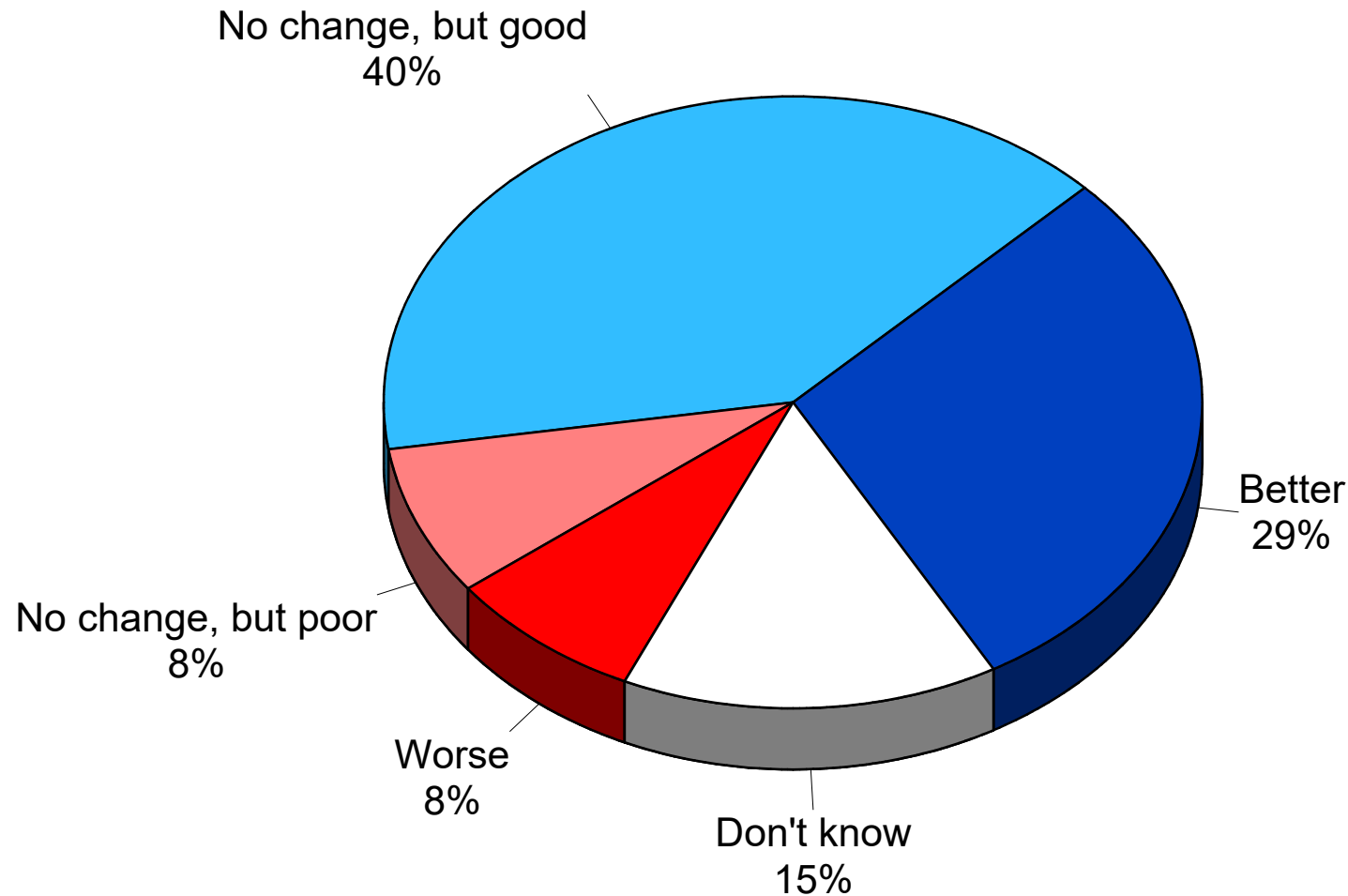
by percentage of respondents who answered "very likely," "likely," or "somewhat likely"



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

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

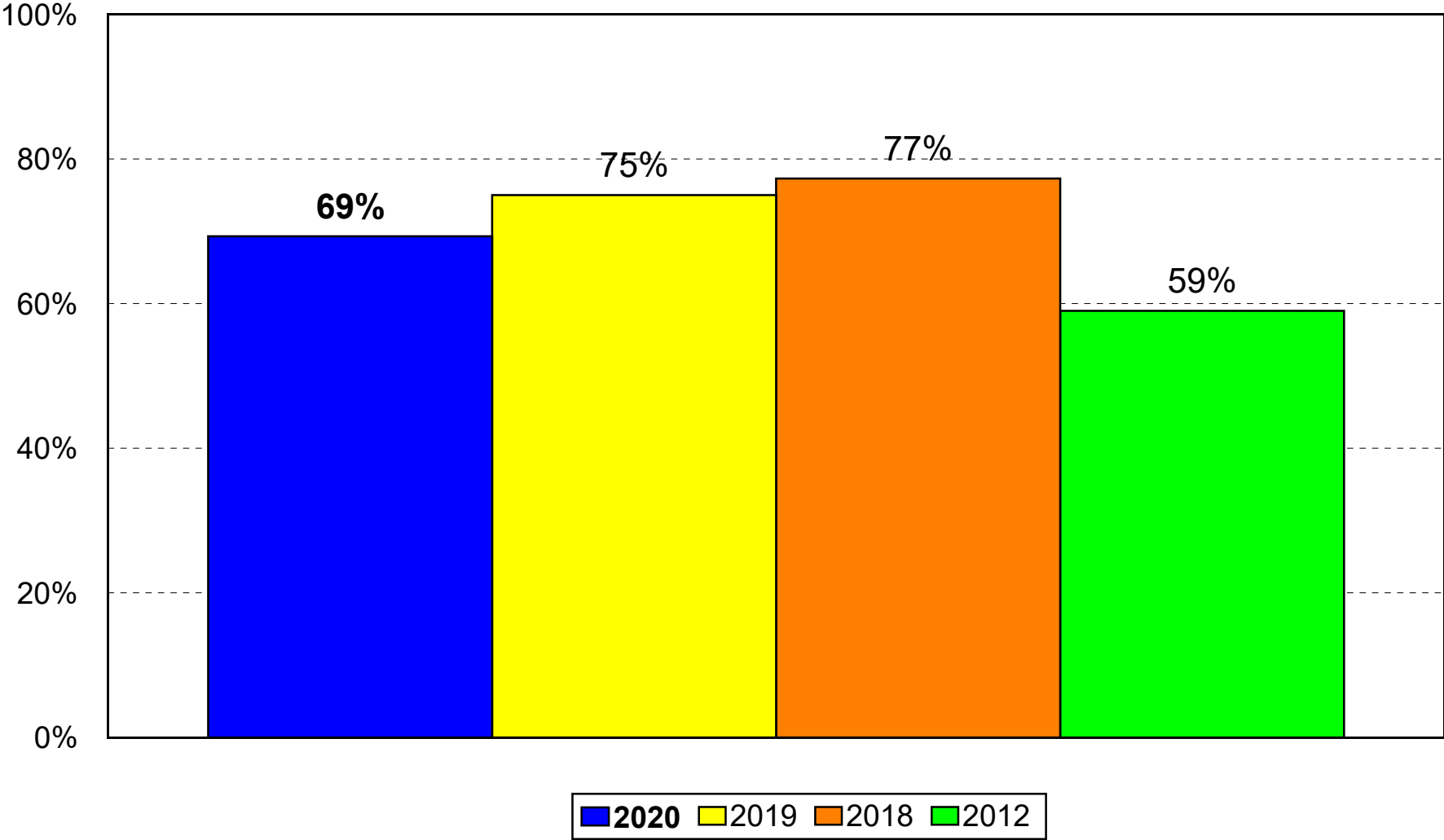
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q7. How would you rate the overall business atmosphere in the Village of Pinehurst today, compared to two years ago? 2012 to 2020

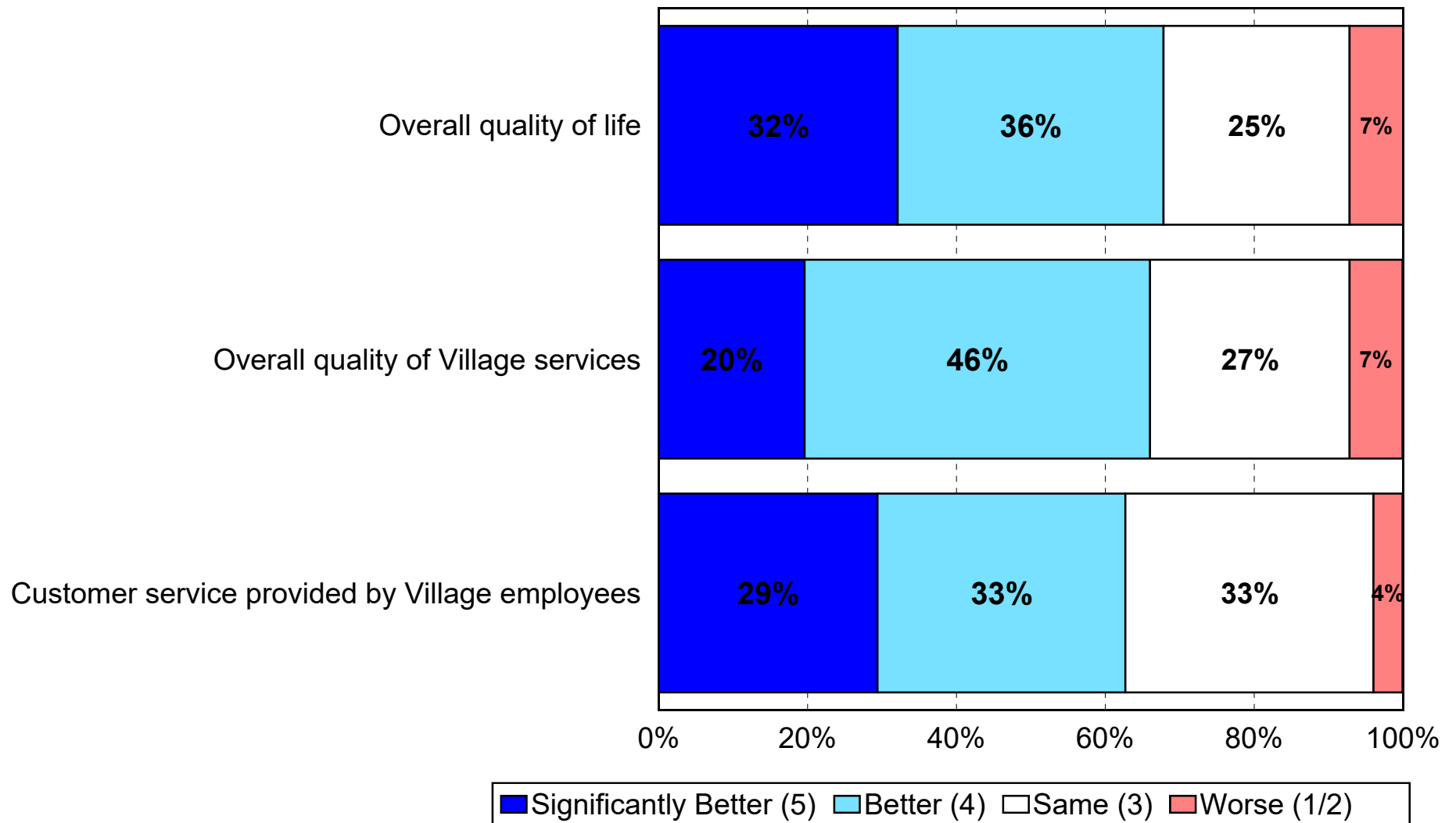
by percentage of respondents who answered "better" or "no change, but good"



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q8. Satisfaction with various aspects of Pinehurst compared to other places businesses have operated in the past

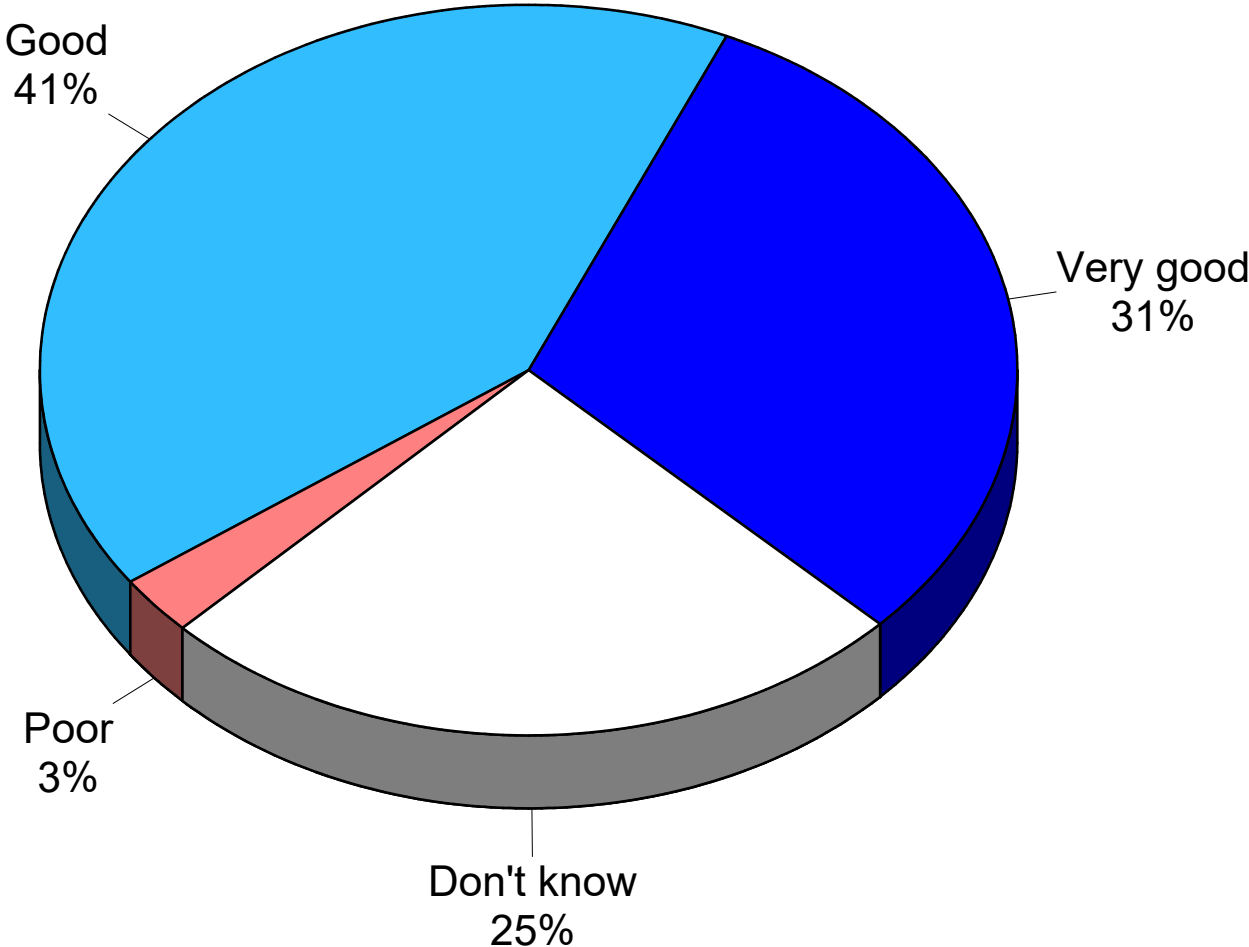
by percentage of respondents who had used the service or department and rated the item as a 1 to 5 on a 5-point scale (excluding “no opinion”)



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q9. How would you rate the Village of Pinehurst customer service?

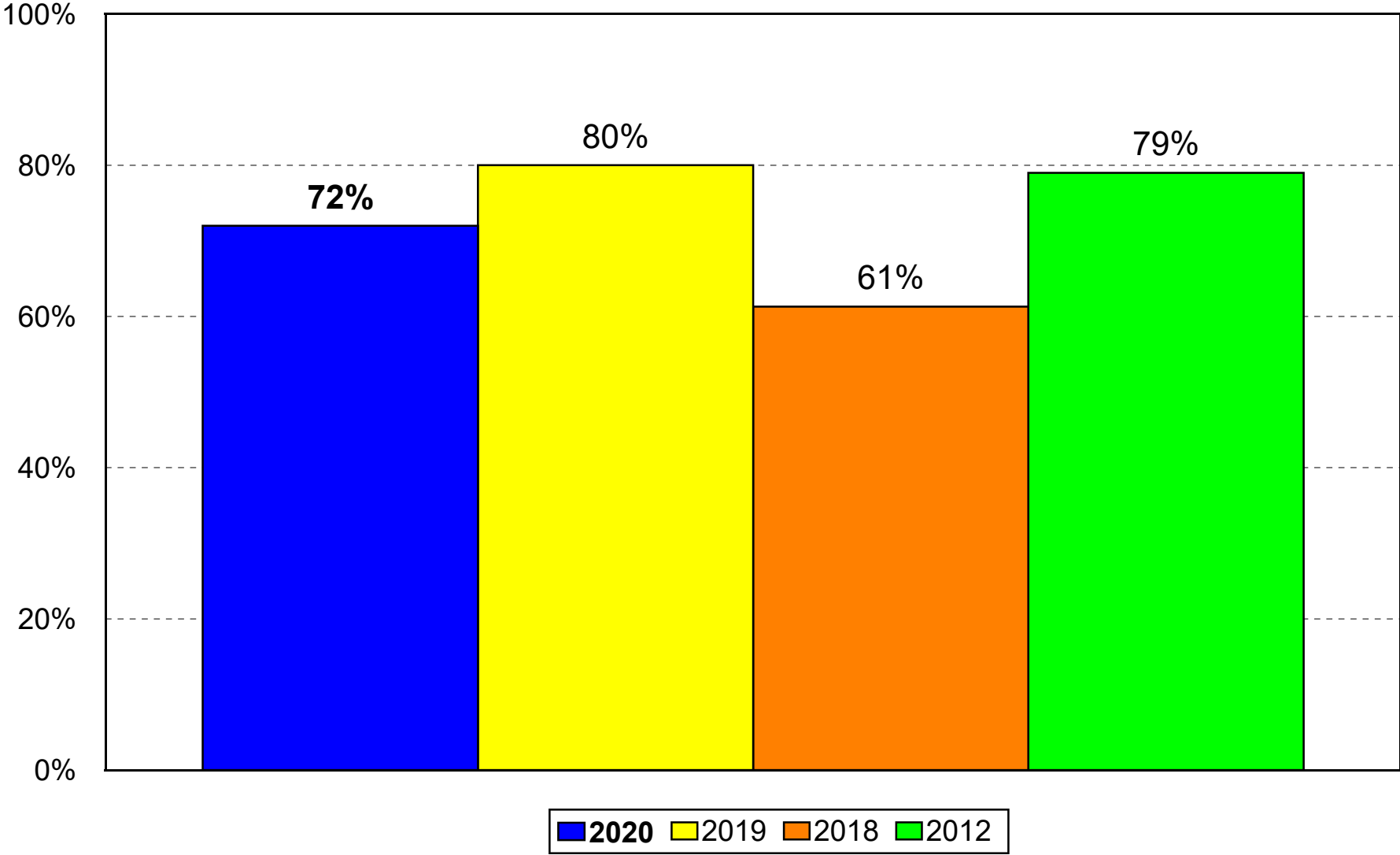
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q9. How would you rate the Village of Pinehurst customer service? - 2012 to 2020

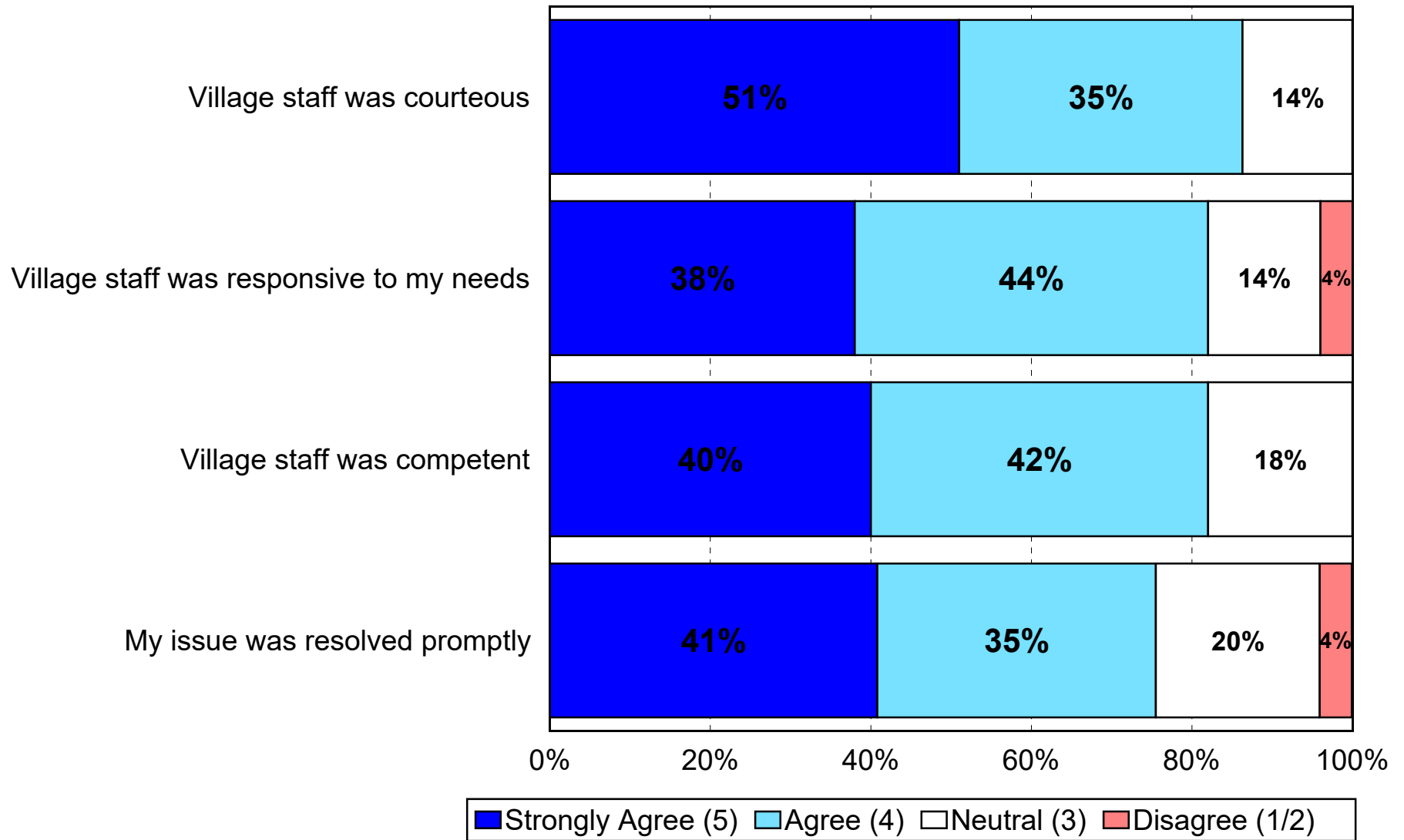
by percentage of respondents who answered "very good" or "good"



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q10. Level of Agreement with Statements About Your Most Recent Contact with the Village Government Staff

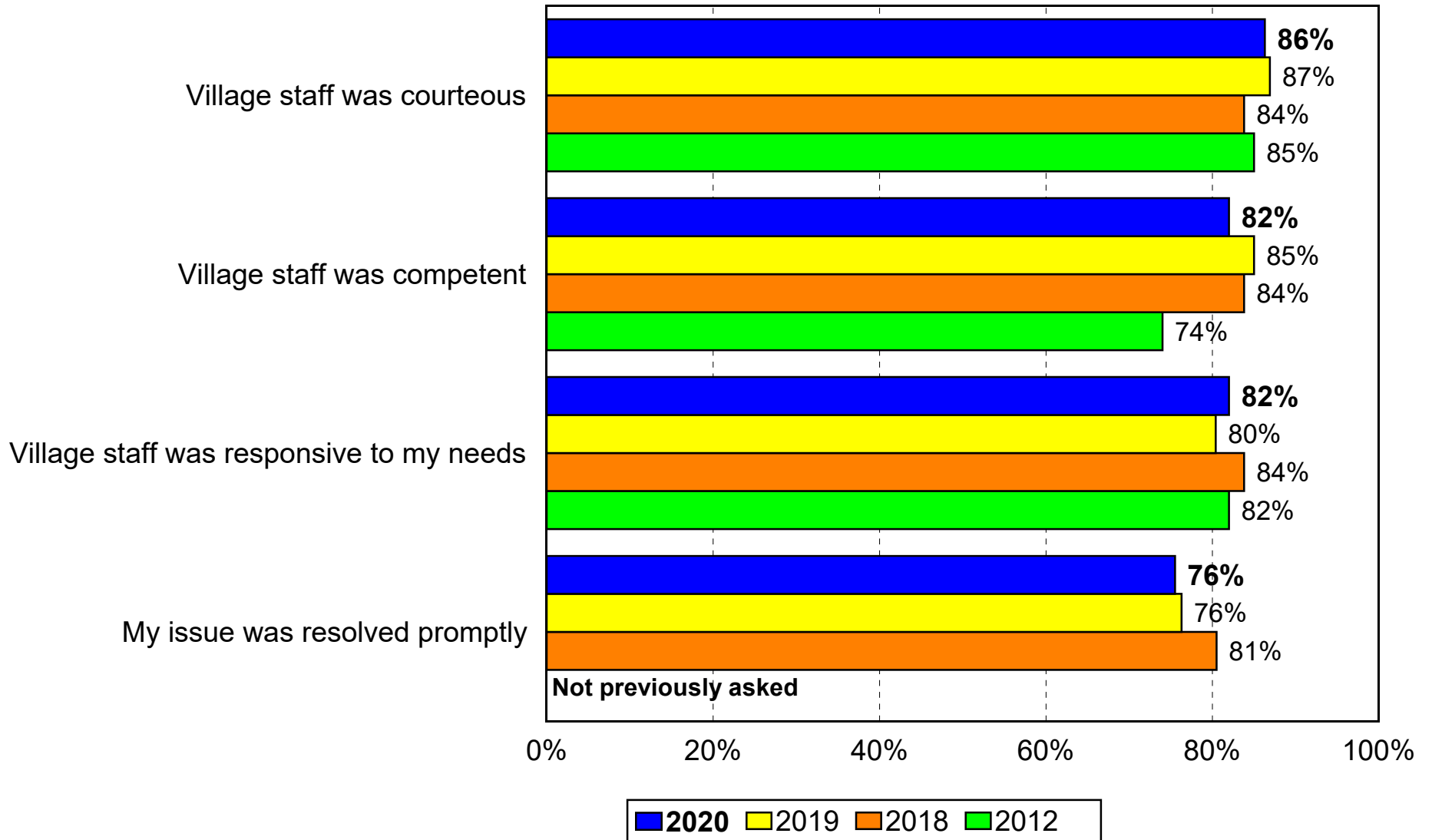
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding “don't know”)



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q10. Level of Agreement with Statements About Your Most Recent Contact with the Village - 2012 to 2020

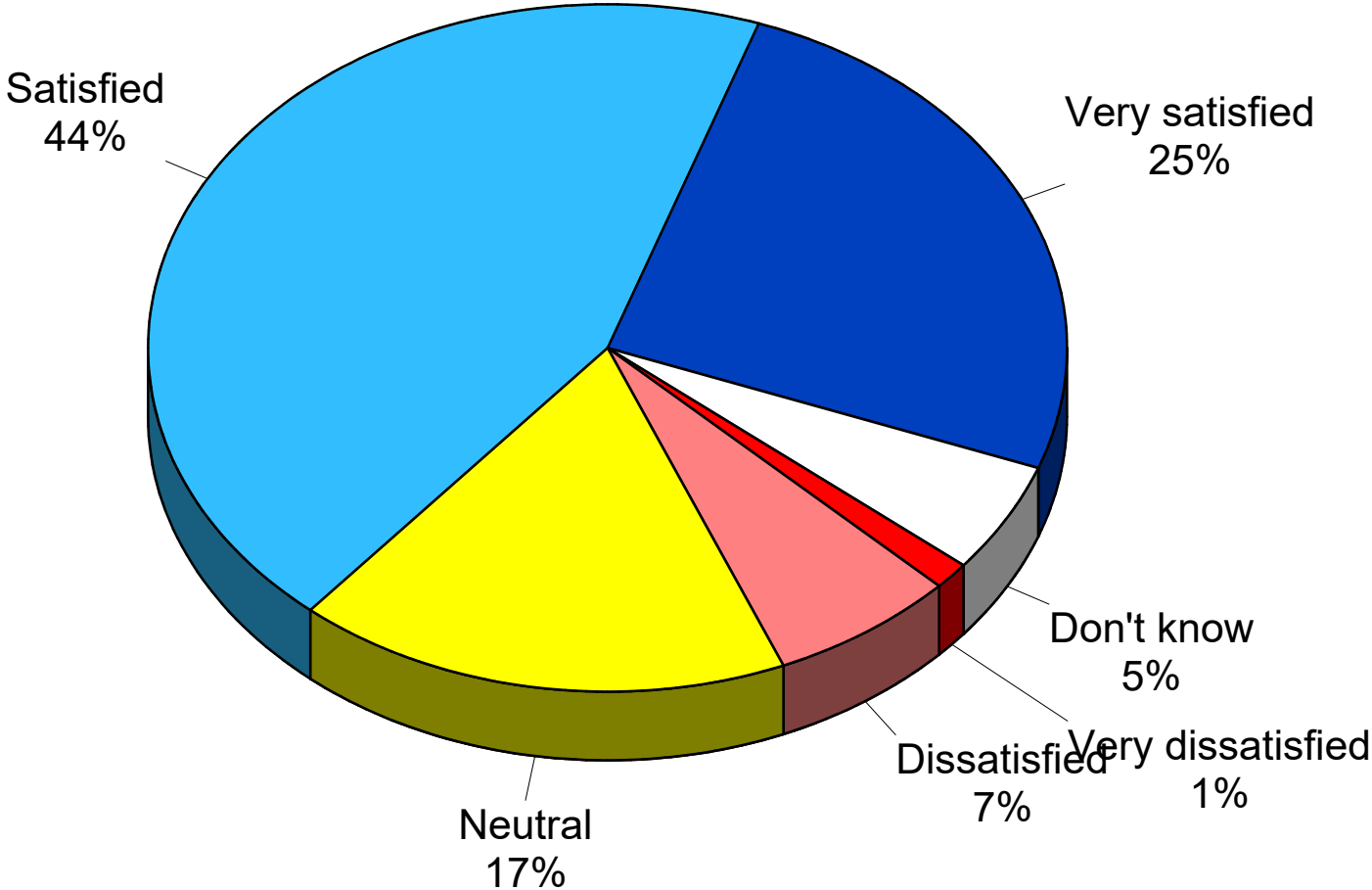
by percentage of respondents who answered "strongly agree" or "agree" (excluding "don't know")



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q11. How satisfied are you with the job the Village of Pinehurst does communicating with business owners?

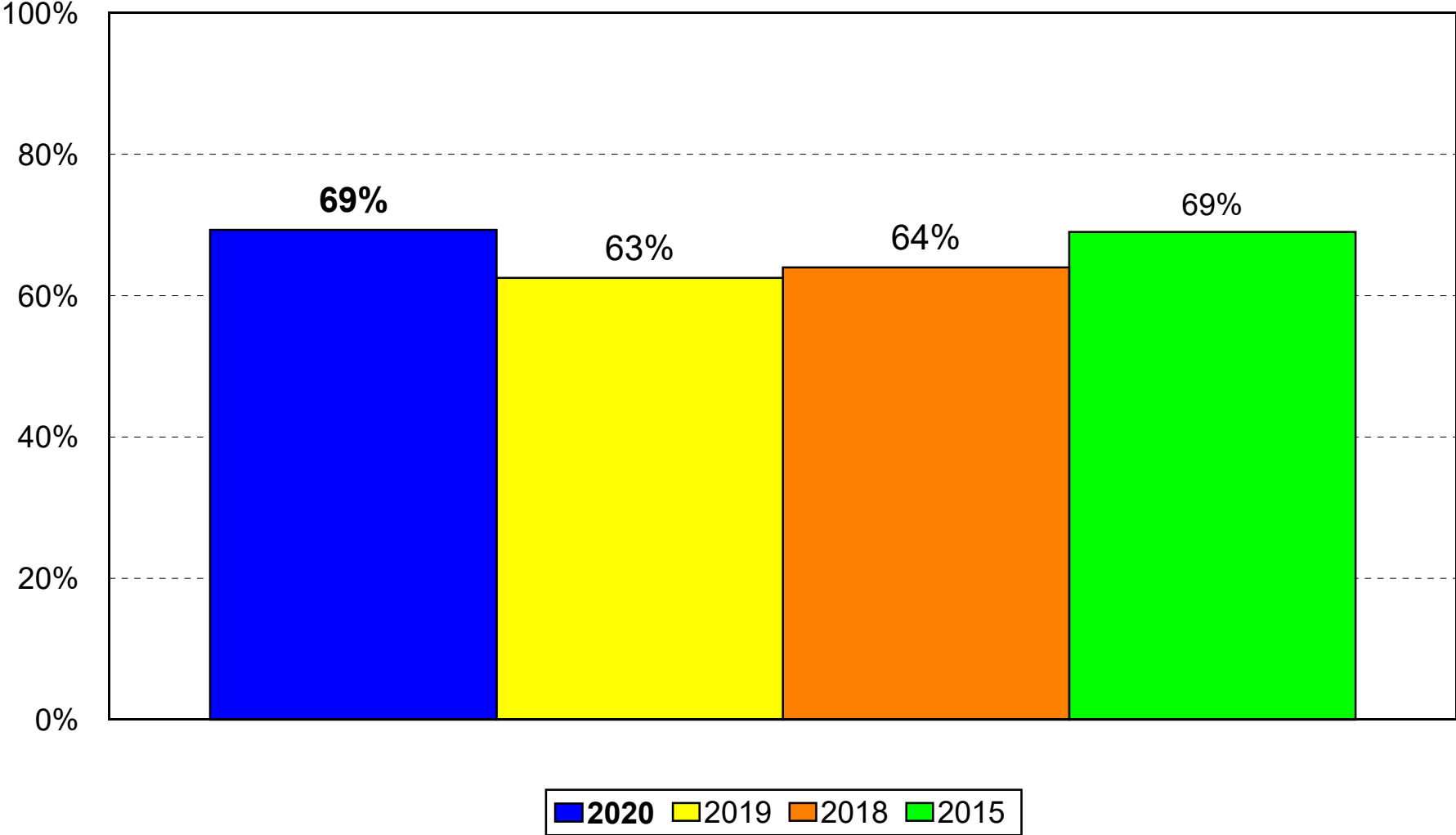
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q11. How satisfied are you with the job the Village of Pinehurst does communicating with business owners? 2015 to 2020

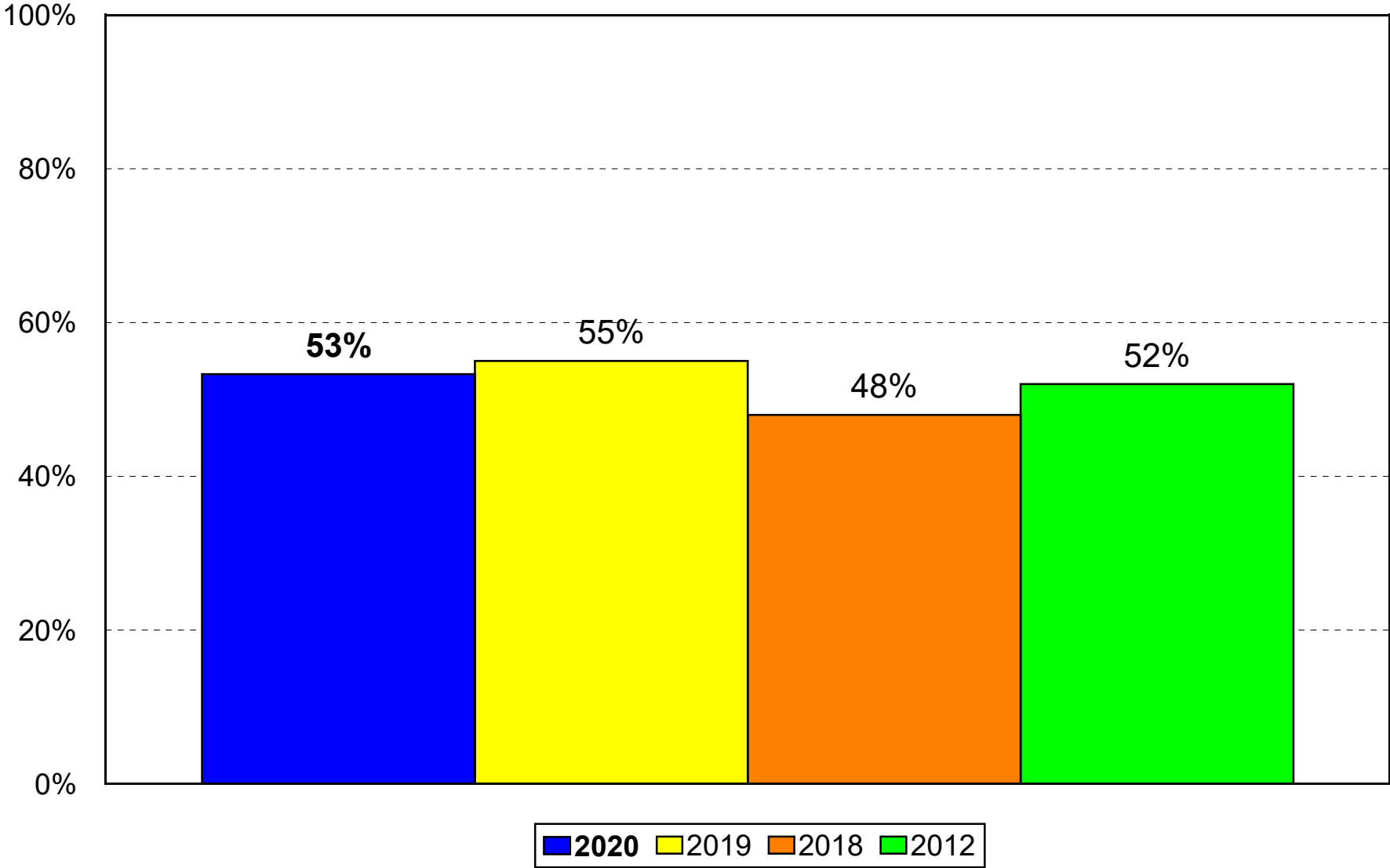
by percentage of respondents who answered "very satisfied" or "satisfied"



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q12. Have you visited the Village's website (www.vopnc.org) during the past 12 months? - 2012 to 2020

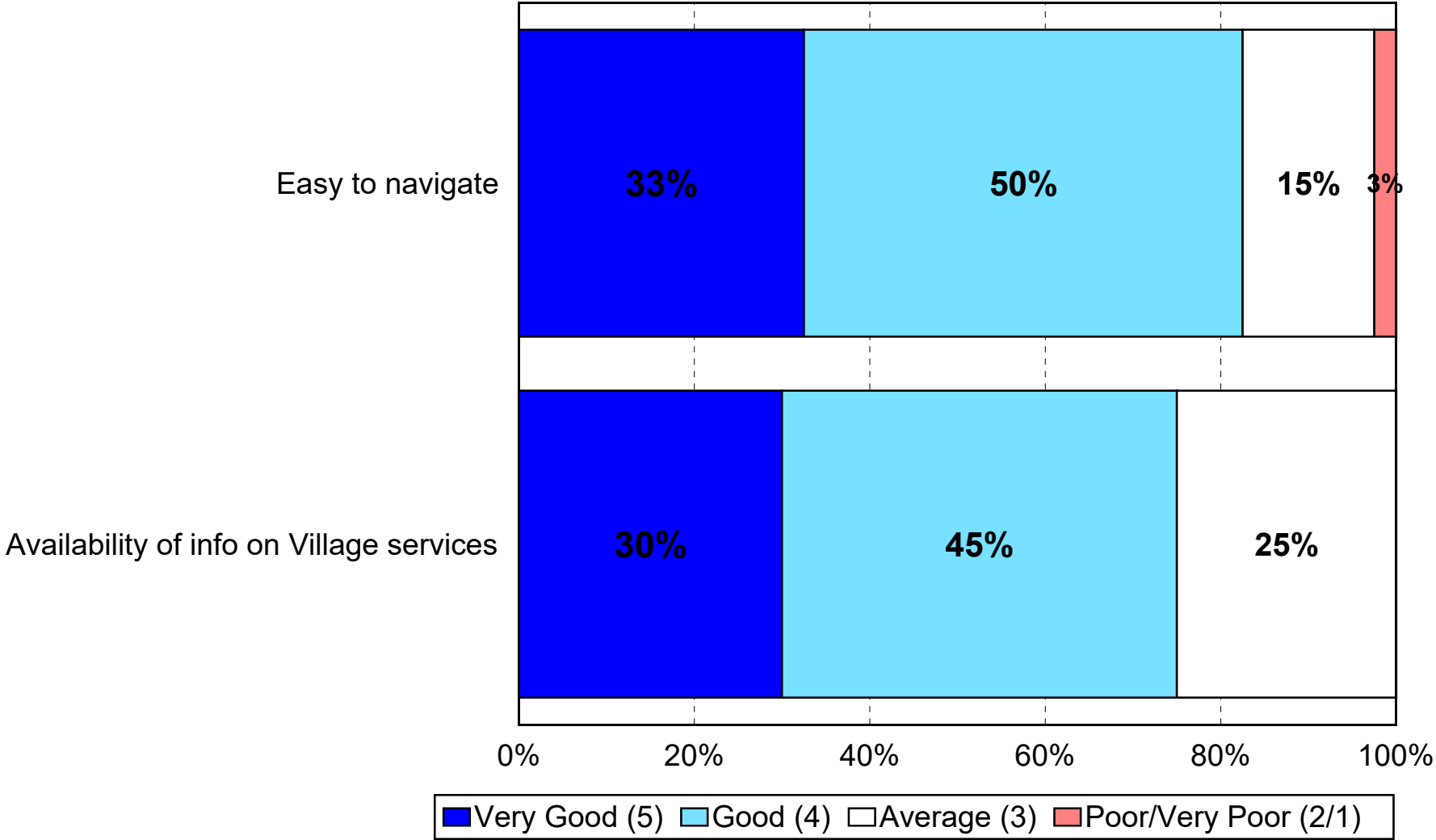
by percentage of respondents who answered "yes"



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q12a. How would you rate the following characteristics of the Village website?

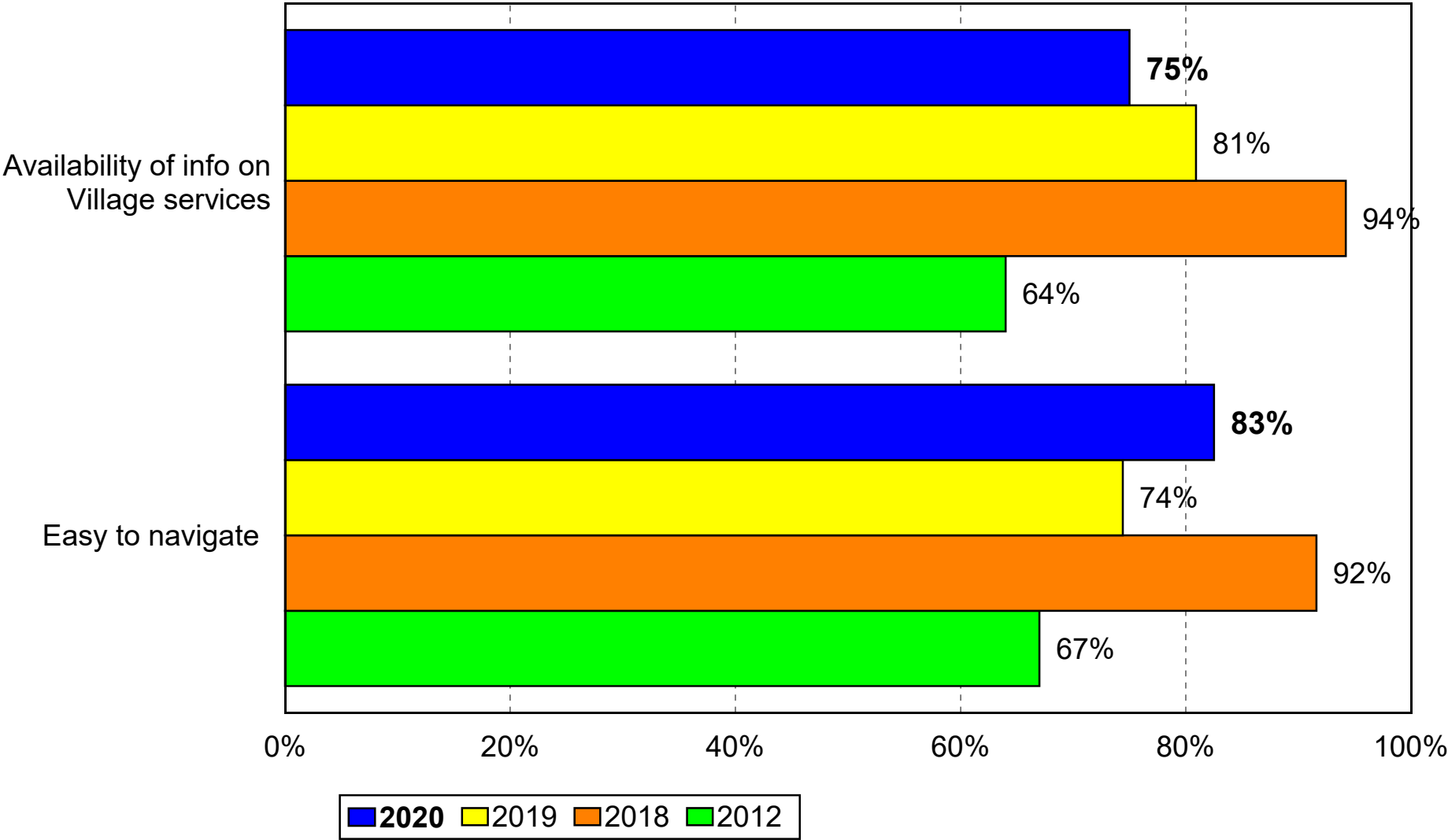
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding “don't know”)



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q12a. How would you rate the following characteristics of the Village website? - 2012 to 2020

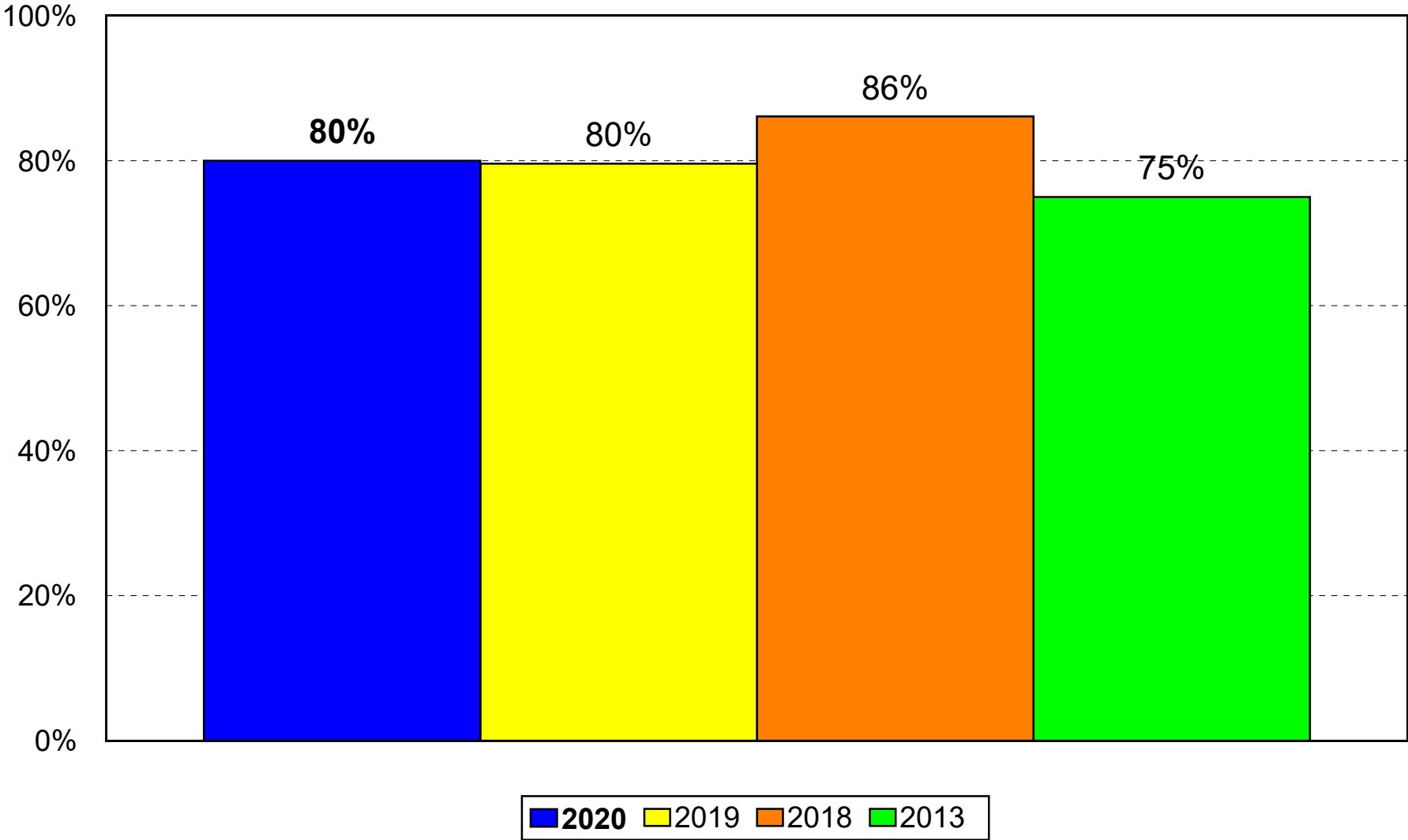
by percentage of respondents who answered "very good" or "good"



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q12b. How satisfied are you with the Village's website? 2013 to 2020

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

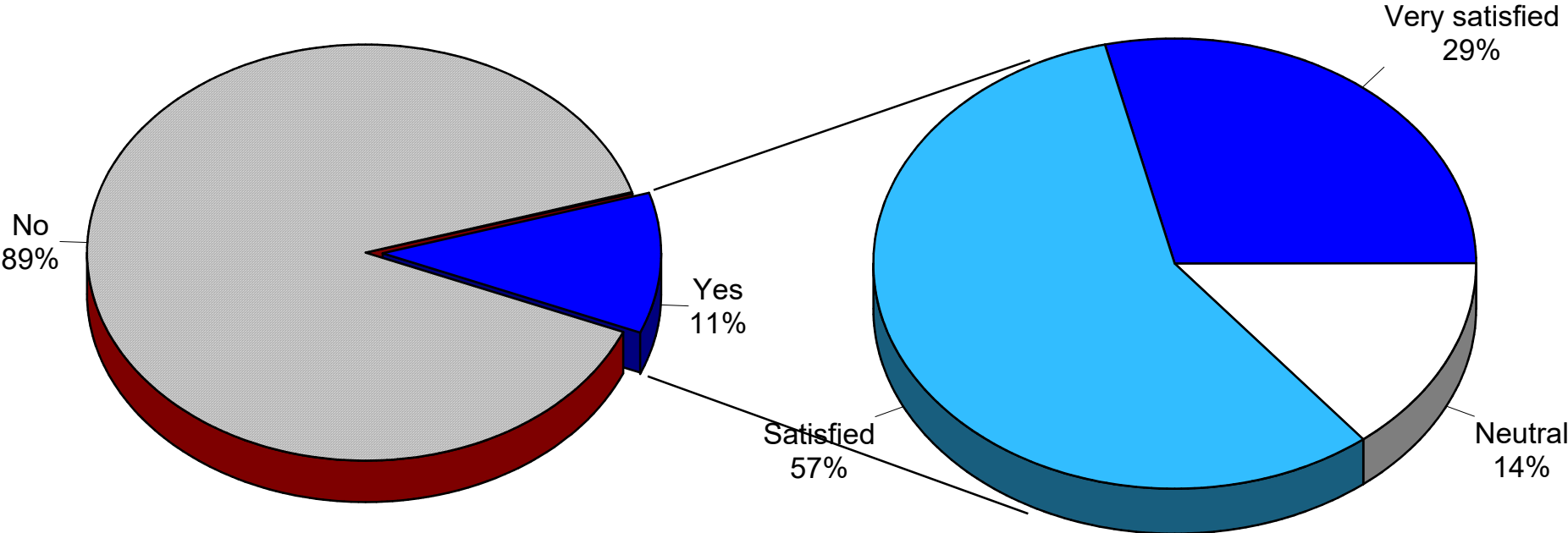


Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q13. Have you used the Village’s mobile app (“MY VOP”) during the past 12 months?

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

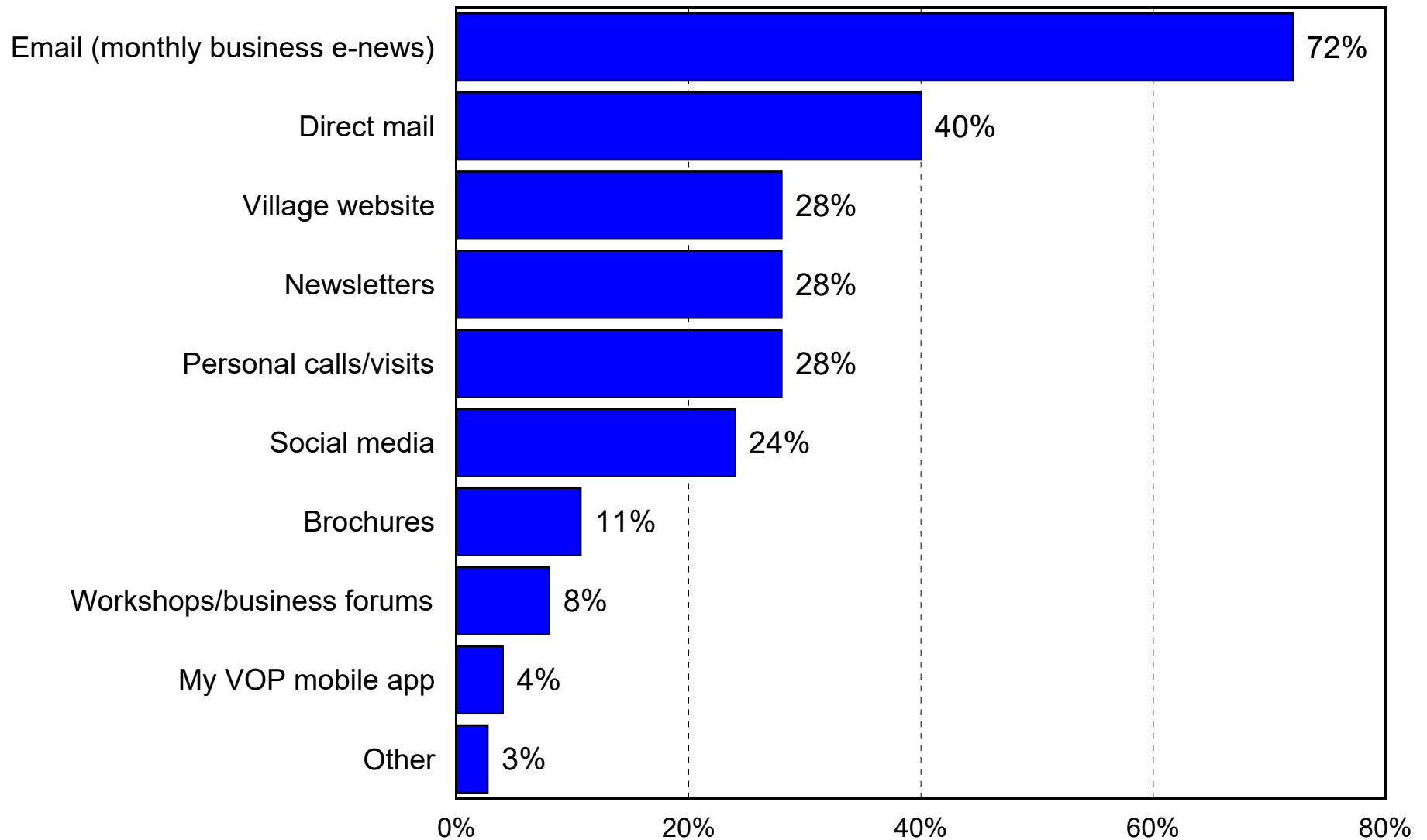
Q13a. If YES, how satisfied were you with The Village mobile app, MY VOP?



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q14. Which of the following are the best ways for the Village to communicate important information to your business?

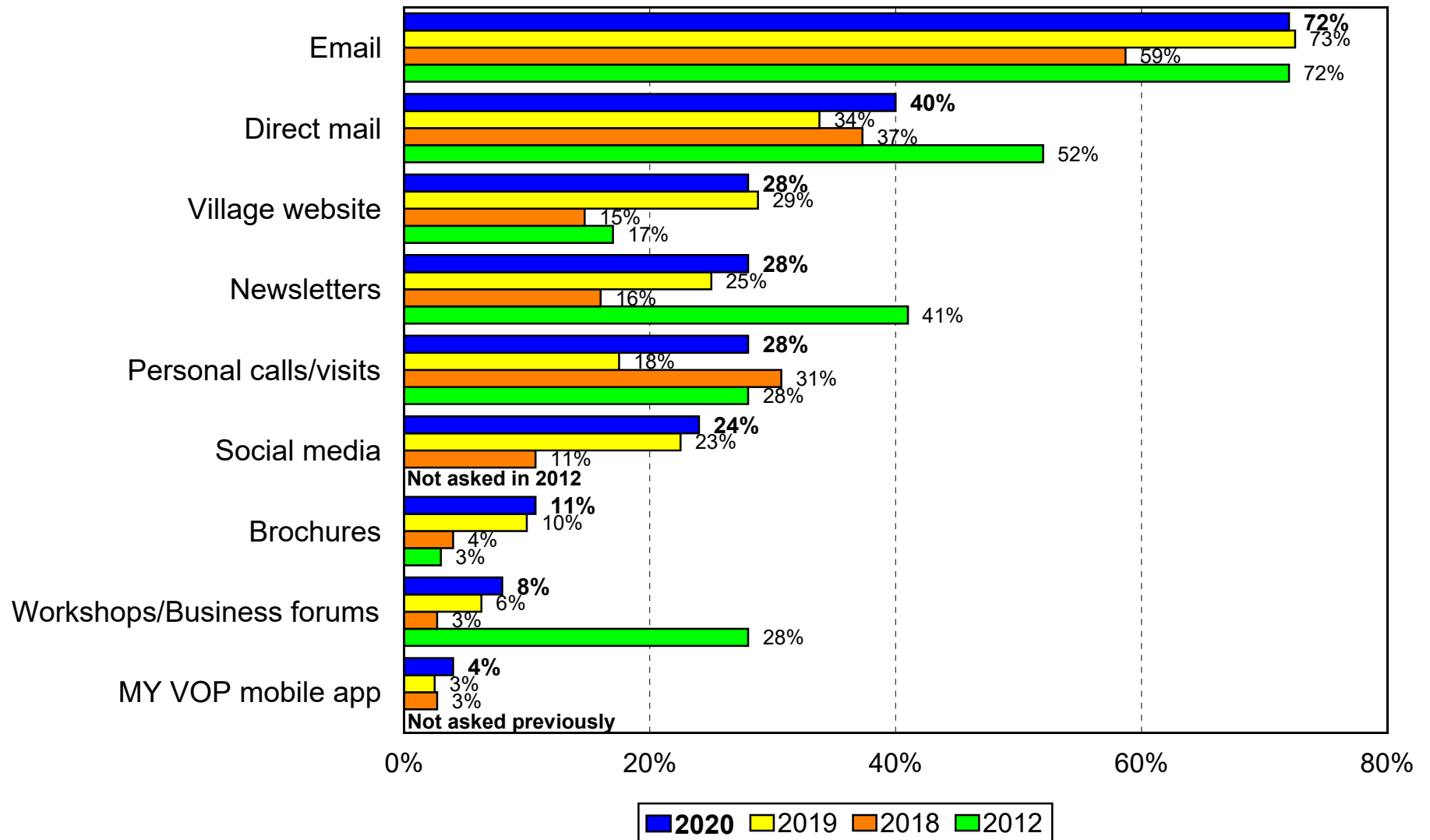
by percentage of respondents (multiple choices could be made)



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q14. Which of the following are the best ways for the Village to communicate important information to your business? 2012 to 2020

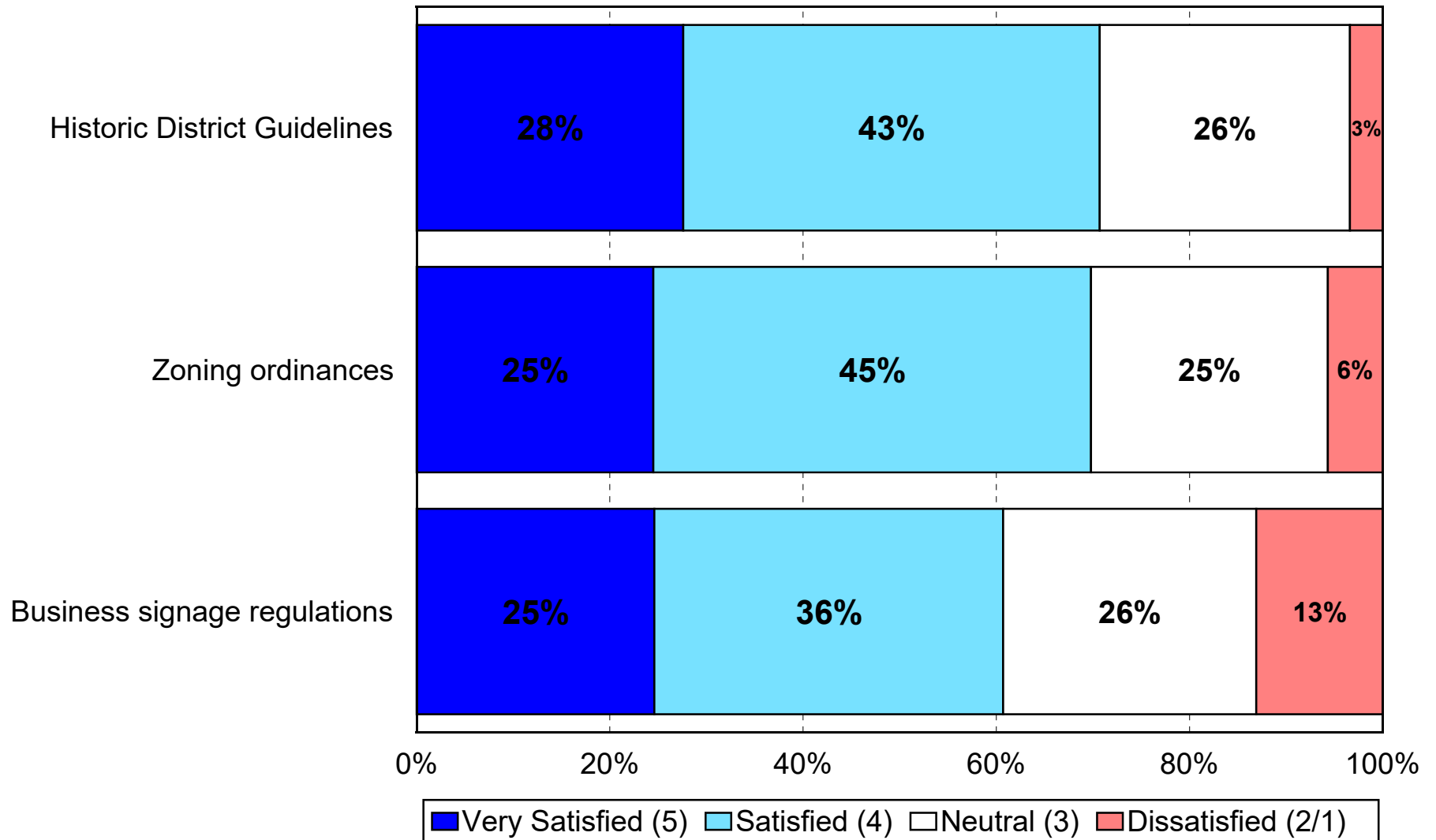
by percentage of respondents (multiple choices could be made)



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q15. Level of Satisfaction with Community Development (Village Codes and Ordinances)

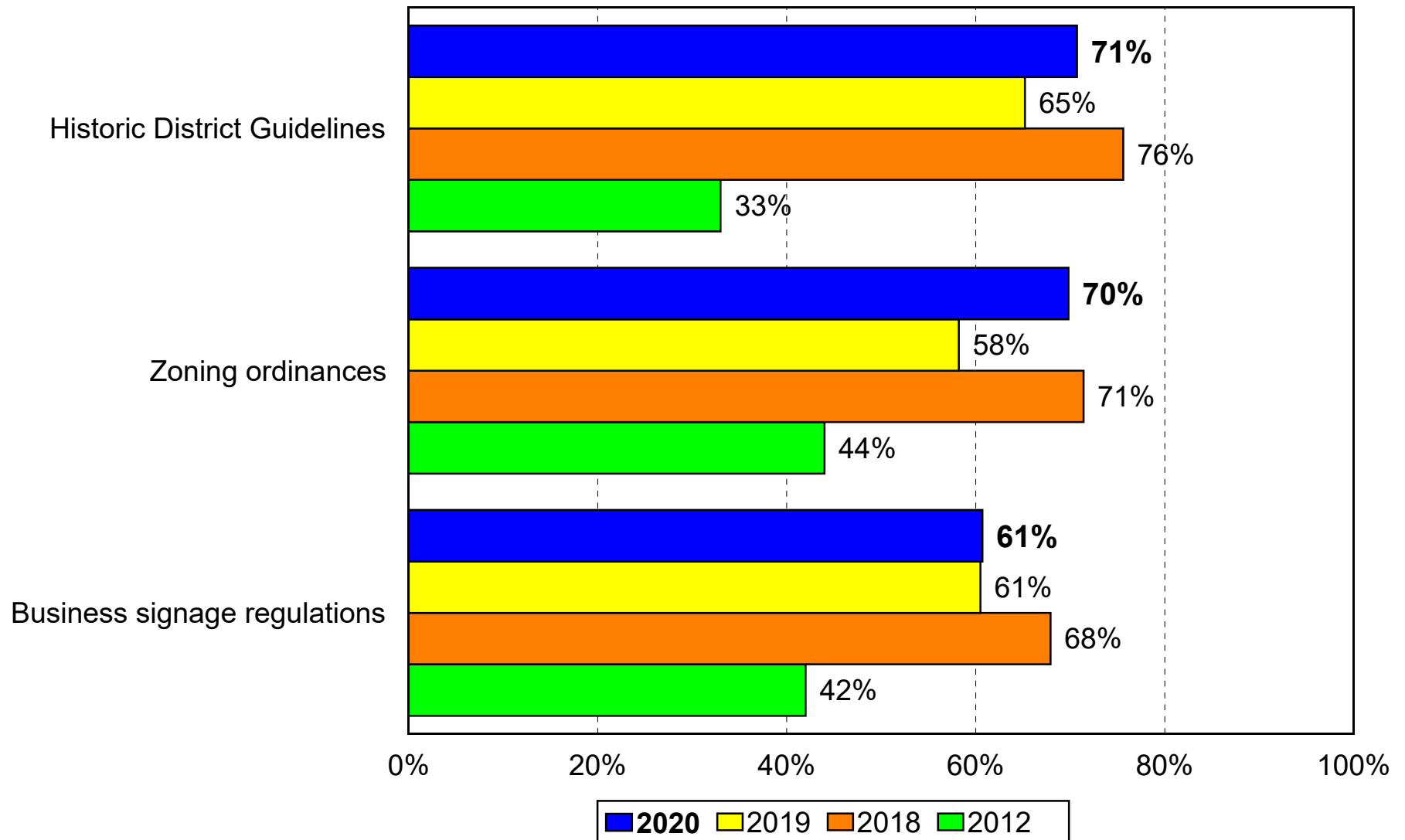
by percentage of respondents who had used the service or department and rated the item as a 1 to 5 on a 5-point scale (excluding “don't know”)



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q15. Level of Satisfaction with Community Development (Village Codes and Ordinances) - 2012 to 2020

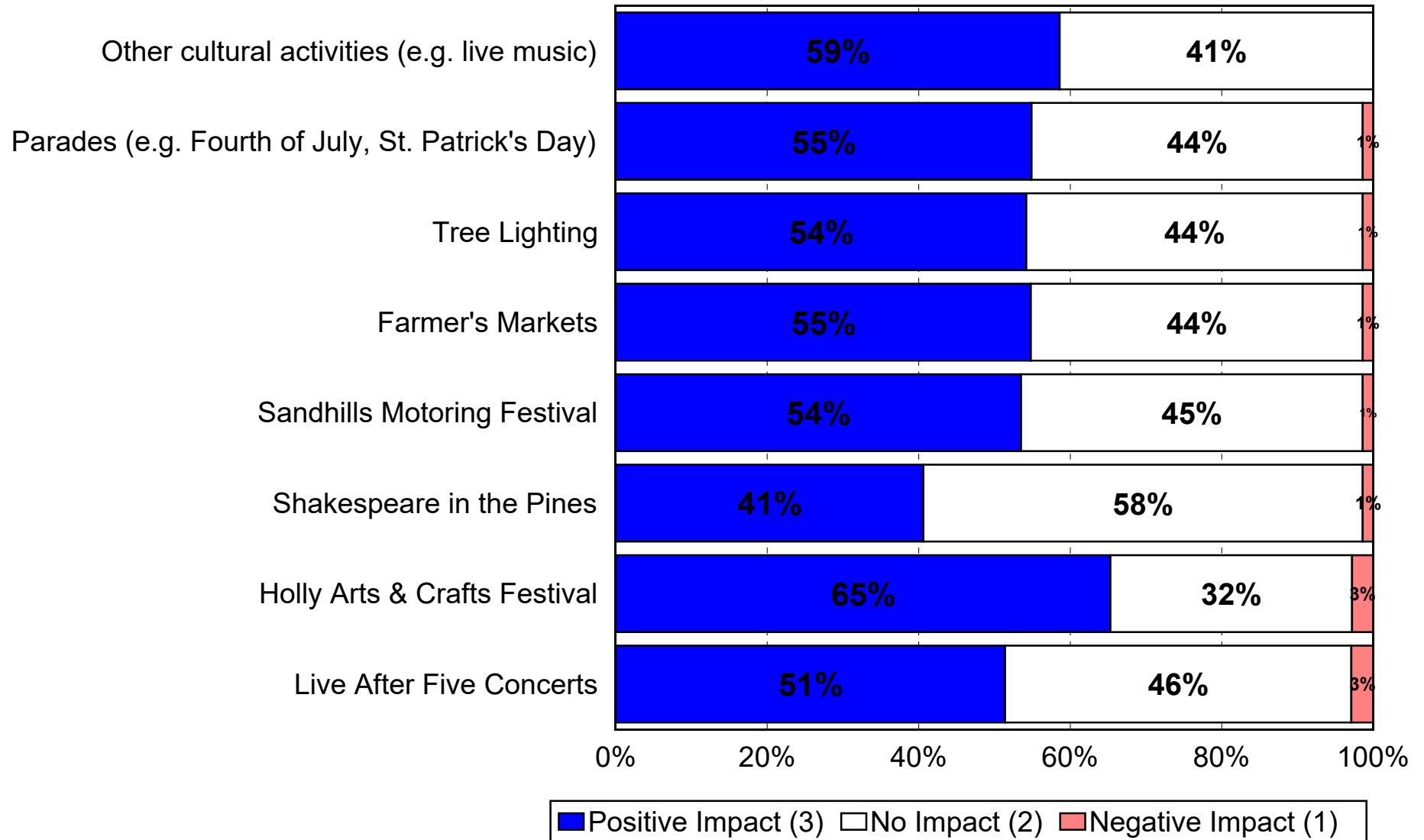
by percentage of respondents who had used the service or department and answered "very satisfied" or "satisfied"



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q16. How Businesses Feel About the Impact the Following Events in the Village Center Have on Their Business

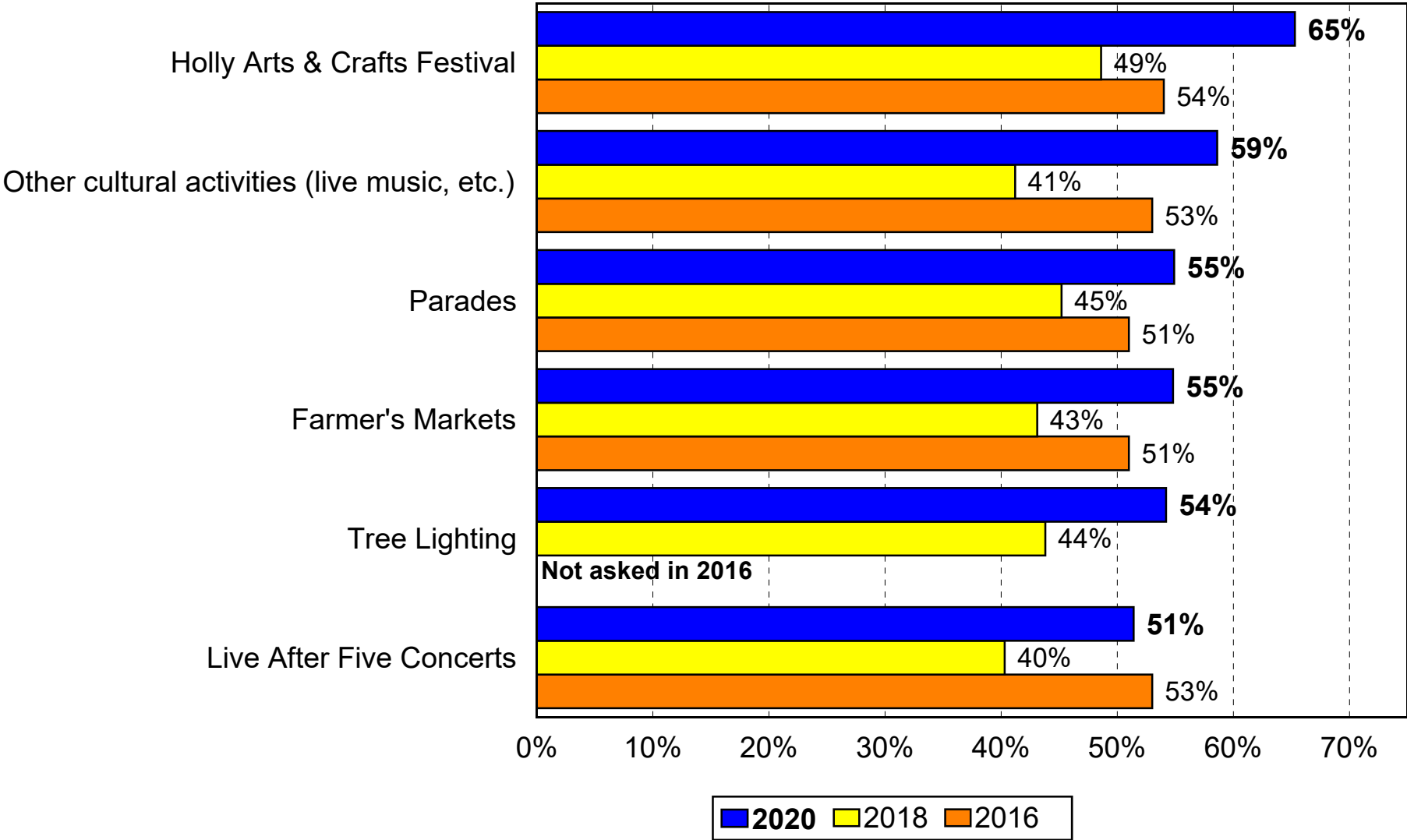
by percentage of respondents who rated the item as a 1 to 3 on a 3-point scale



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q16. How Businesses Feel About the Impact the Following Events in the Village Center Have on Their Business 2016 to 2020

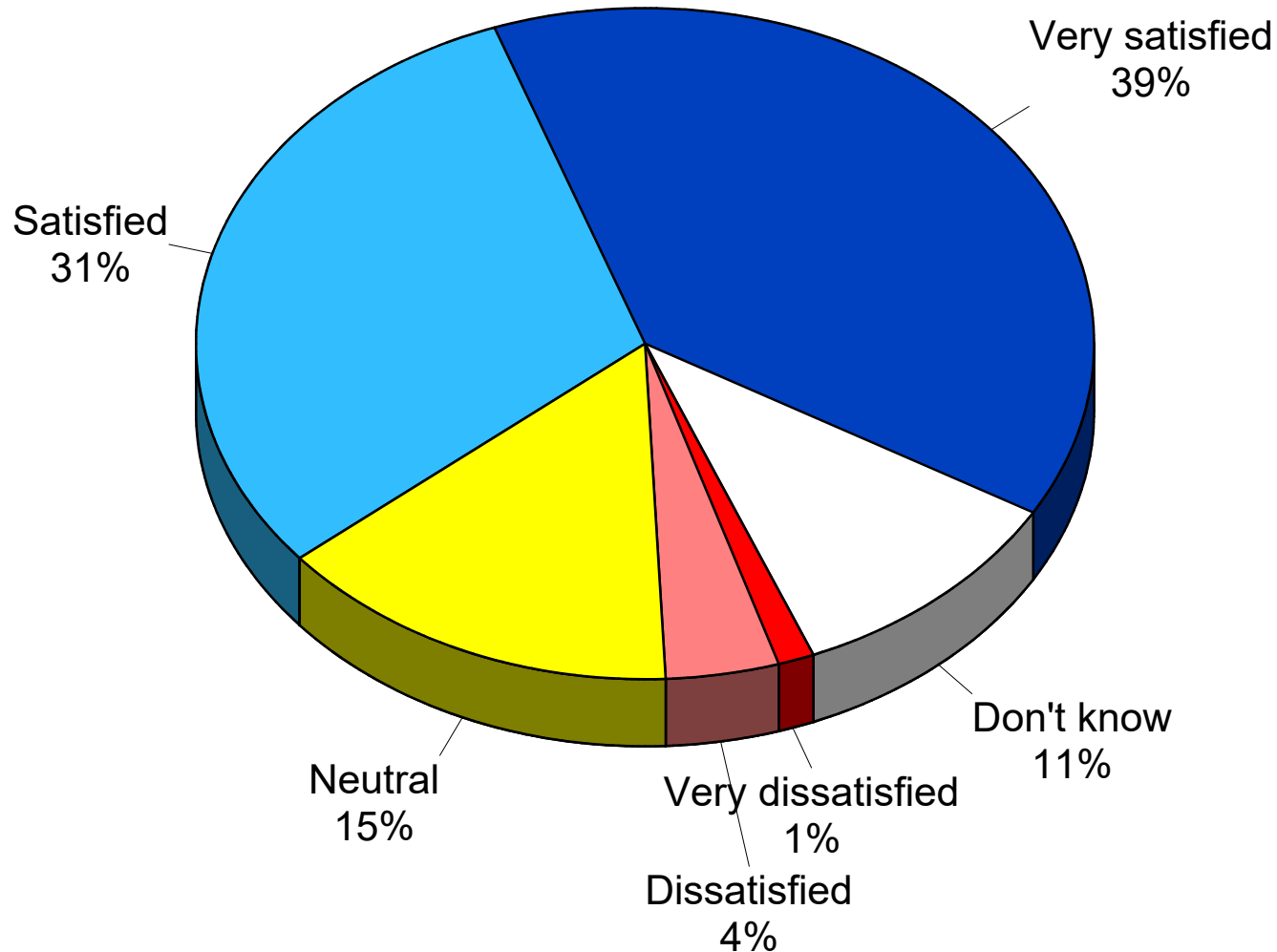
by percentage of respondents who felt the event had a "positive impact" on their business



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q17. How satisfied are you with the way the Village handles events that attract large crowds to the Village?

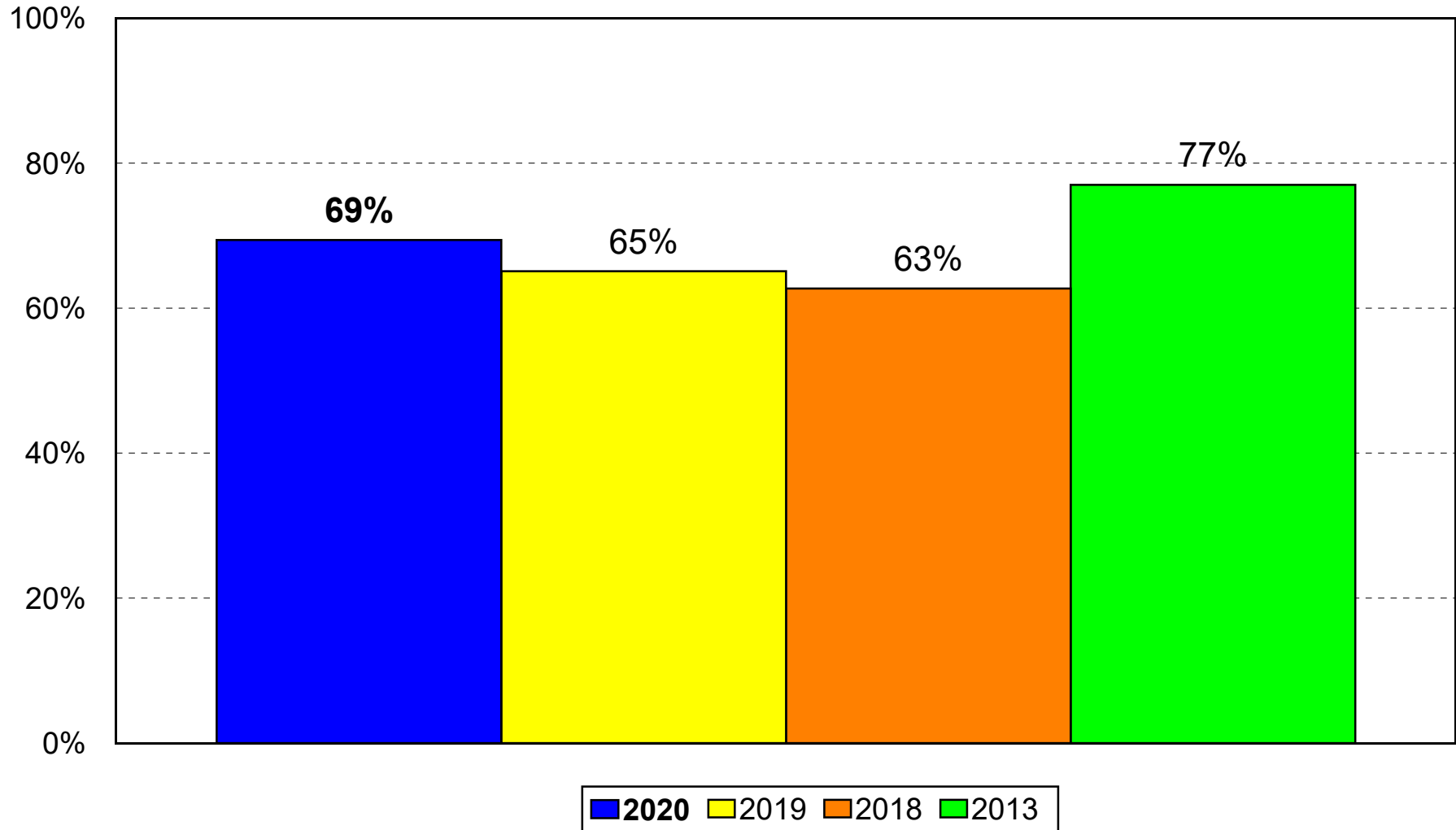
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q17. How satisfied are you with the way the Village handles events that attract large crowds to the Village? 2013 to 2020

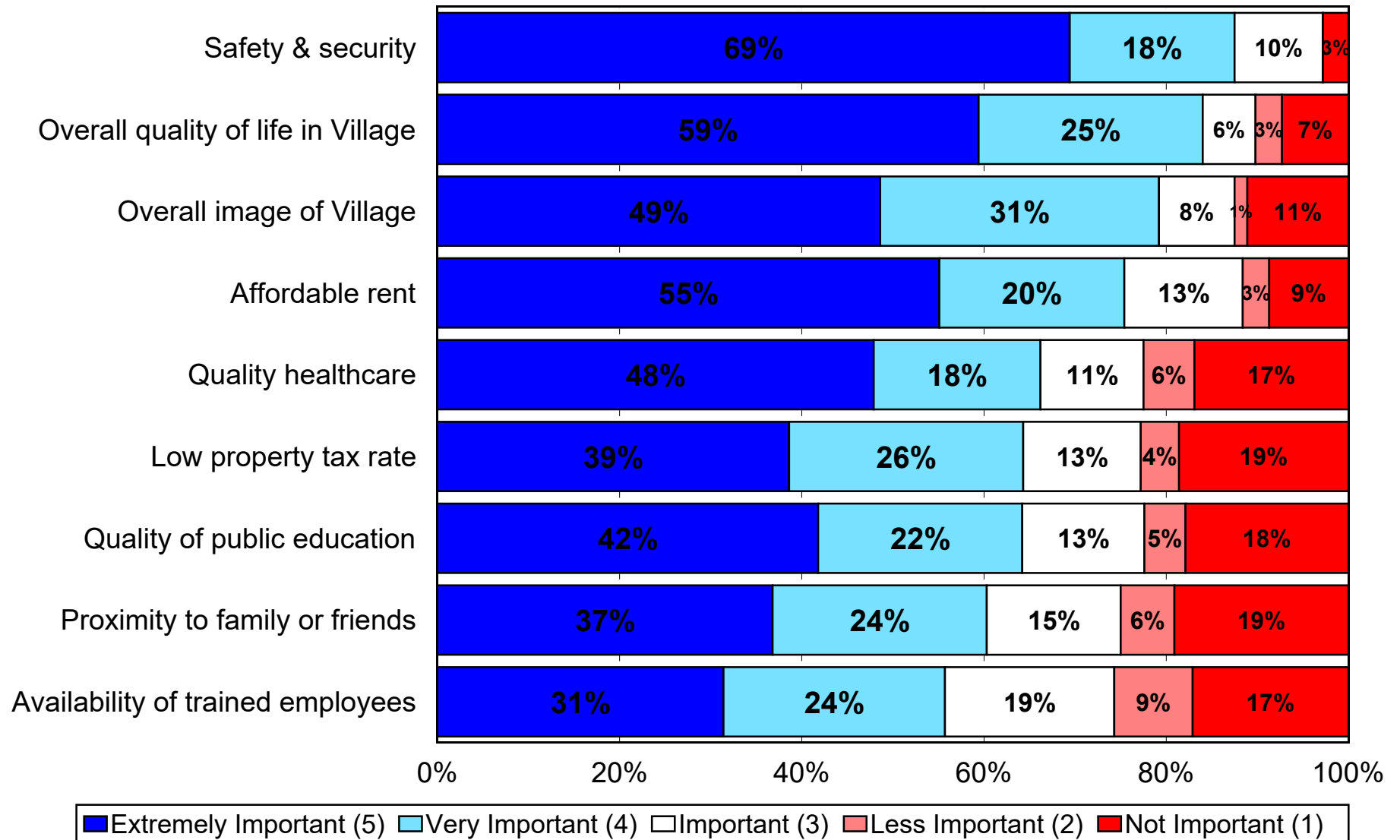
by percentage of respondents who answered “very satisfied” or “satisfied”



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q18. Importance of Various Reasons in Your Decision to Locate Your Business in the Village of Pinehurst

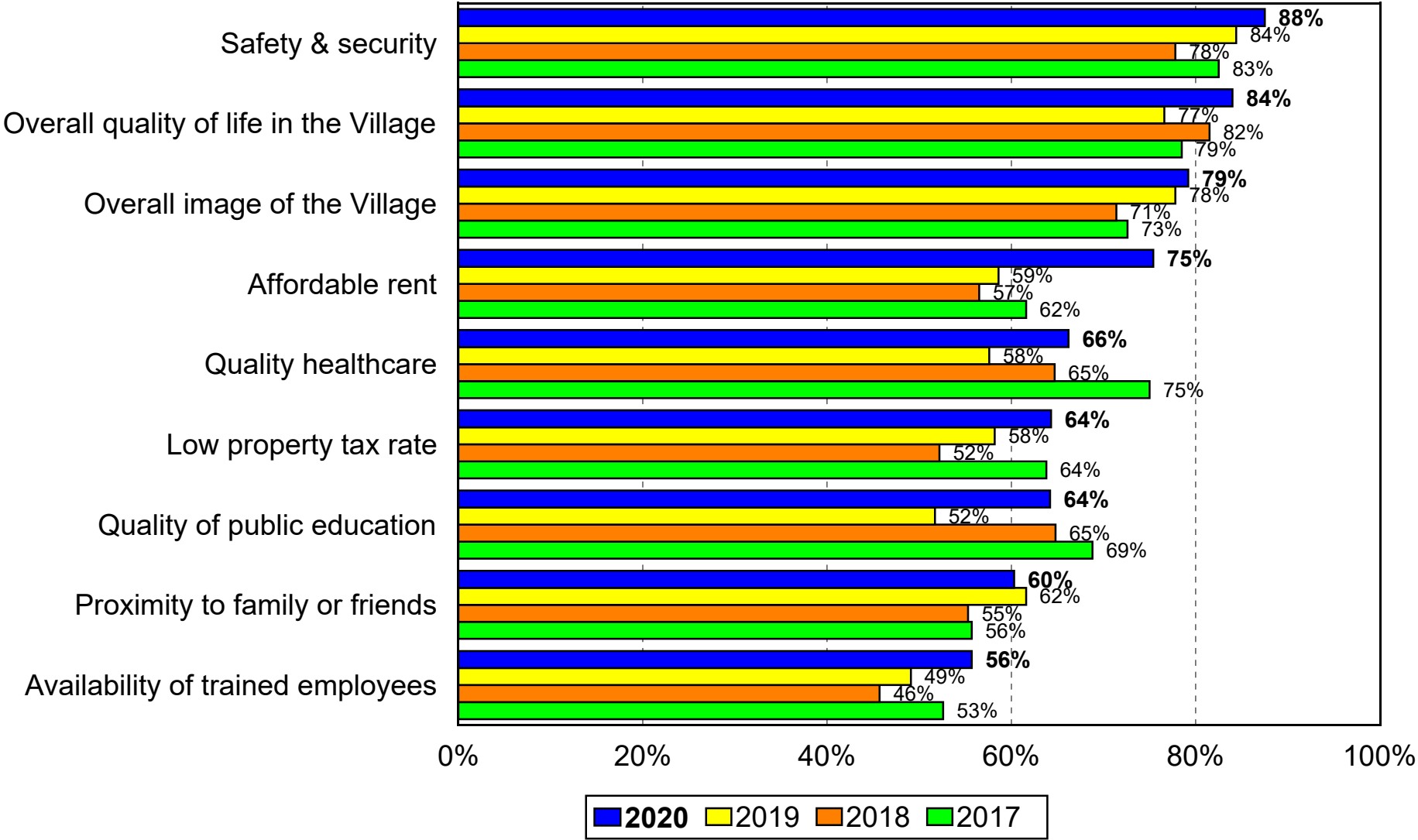
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding “not provided”)



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q18. Importance of Various Reasons in Your Decision to Locate Your Business in the Village of Pinehurst 2017 to 2020

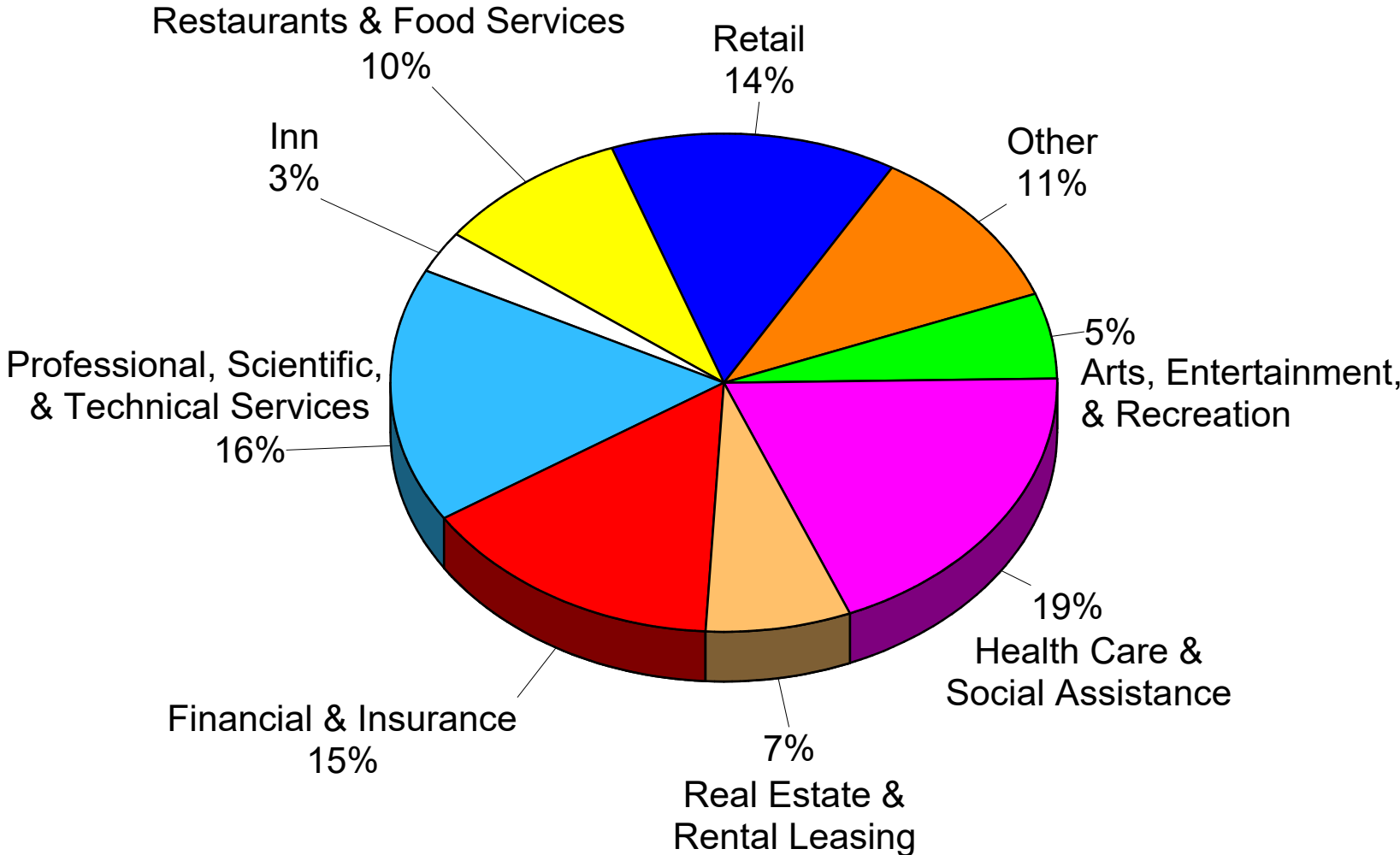
by percentage of respondents who felt the reason was “extremely important” or “very important”



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q21. Primary Business Category for Your Business

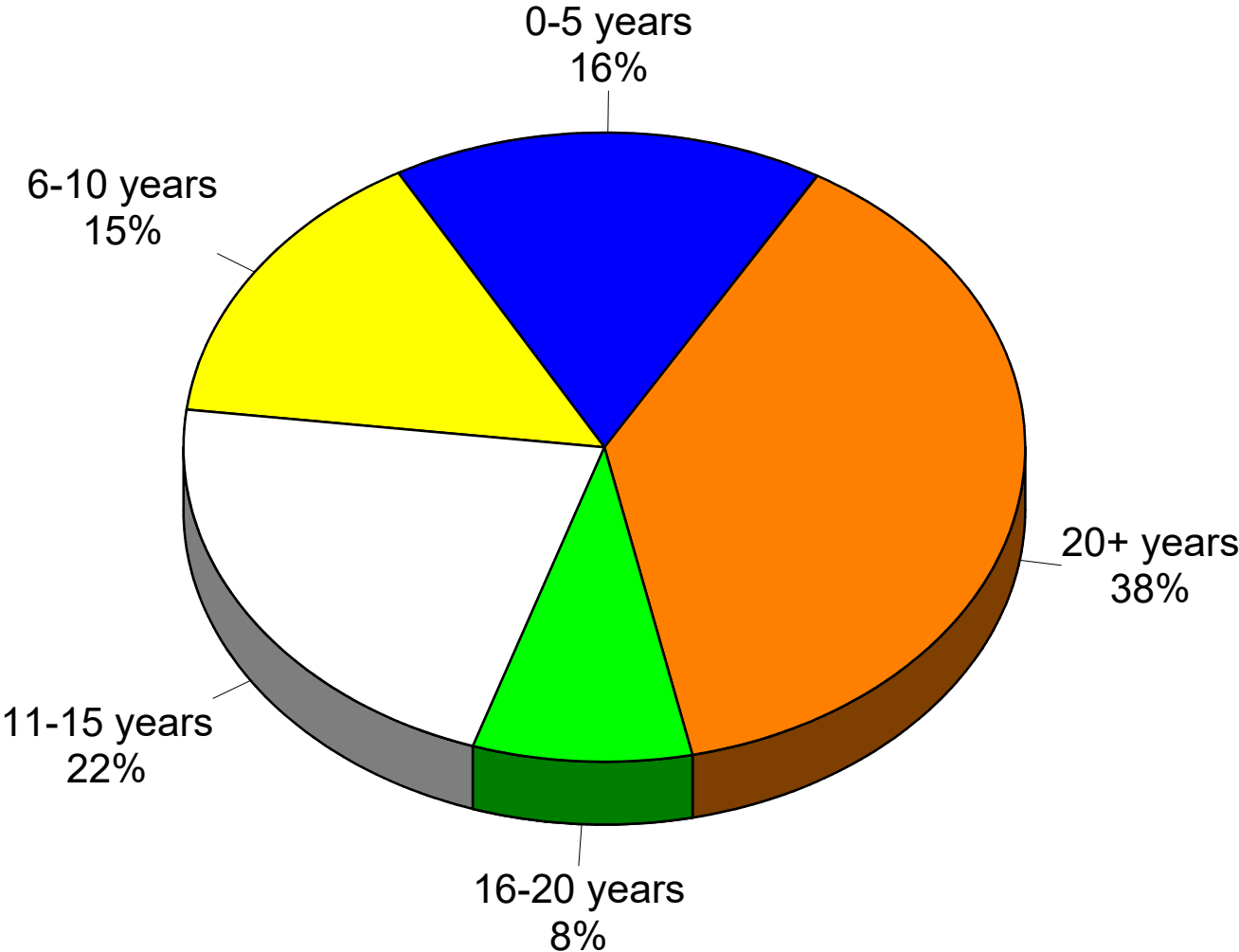
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q22. How many years have you been in operation in the Village?

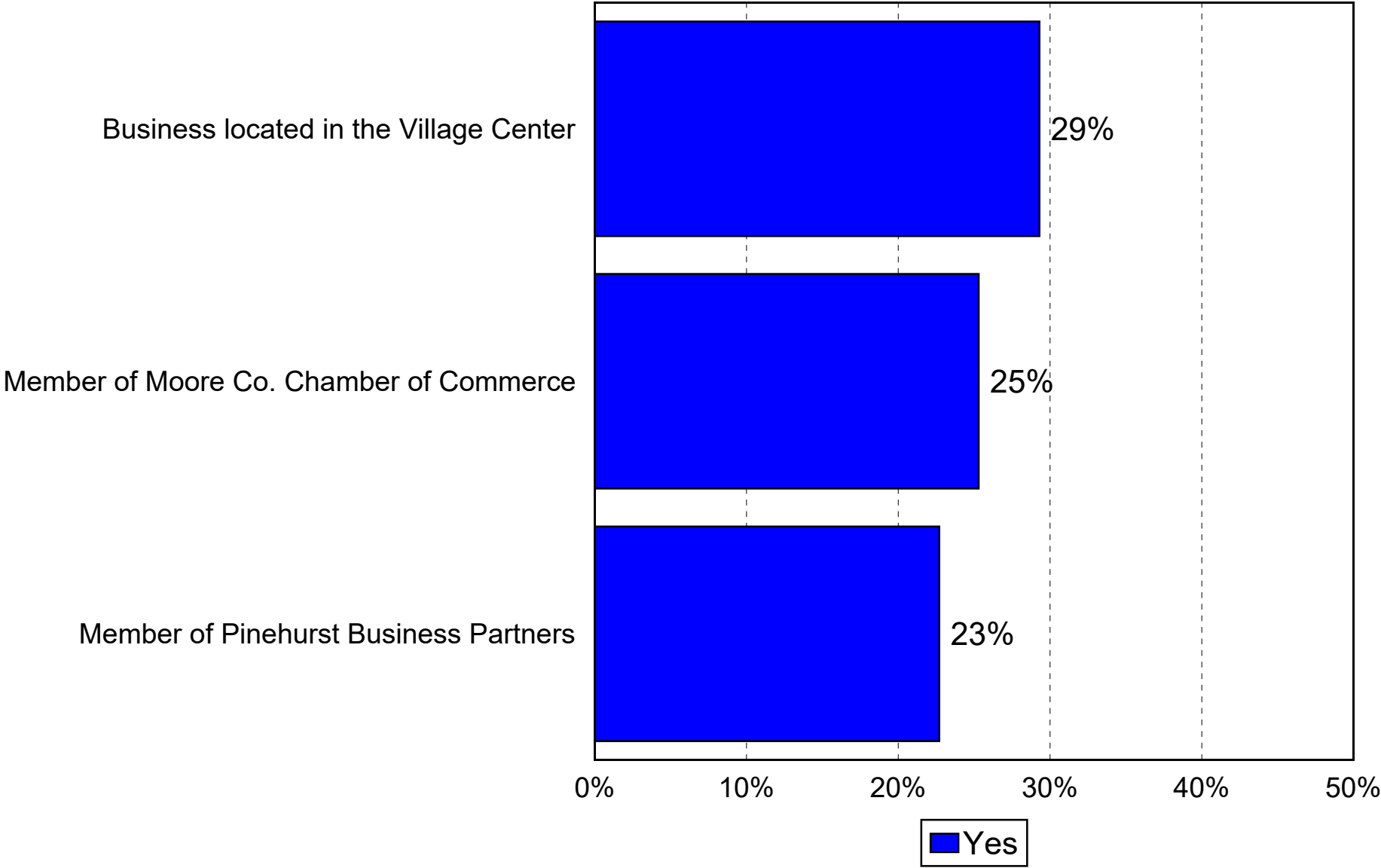
by percentage of respondents (excluding "not provided")



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

Q23. Is Your Business Any of the Following:

by percentage of respondents who answered "yes"



Source: ETC Institute (Pinehurst, NC Business Survey - 2020)

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. $[IS = \text{Importance} \times (1 - \text{Satisfaction})]$.

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, 76.9% 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, 40% was multiplied by 23.1% (1-0.769). This yielded an I-S rating of 0.0924, which ranked 1st 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 pages.

2020 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	40%	3	77%	9	0.0924	1
Police Patrol	61%	1	92%	5	0.0515	2
Police Emergency Response	44%	4	90%	6	0.0439	3
Planning and Zoning	17%	8	86%	8	0.0247	4
Building Inspections	17%	7	90%	7	0.0182	5
Fire Inspections	21%	5	98%	4	0.0047	6
Code Enforcement	19%	6	100%	2	0.0000	7
Village Hall (General)	9%	9	100%	3	0.0000	8
Fire Emergency Response	44%	2	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.



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).

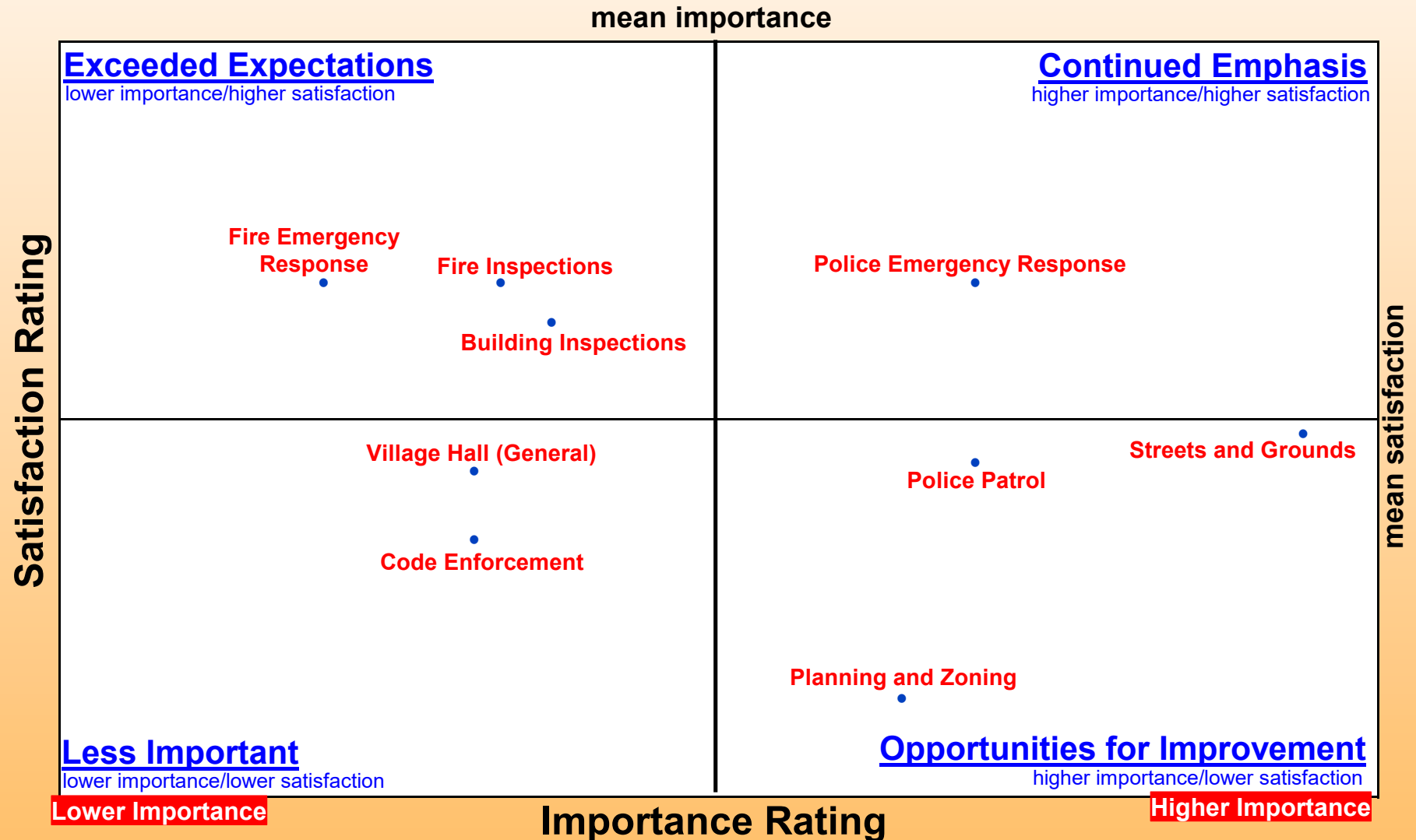
- **Continued Emphasis (above average importance and above average satisfaction).** This area shows where the Village is meeting customer expectations. Items in this area have a significant impact on the customer's overall level of satisfaction. The Village should maintain (or slightly increase) emphasis 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.

2020 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.

(N=75)

	Yes	No
Q1-1. Building Inspections	26.7%	73.3%
Q1-2. Fire Inspections	65.3%	34.7%
Q1-3. Planning & Zoning	18.7%	81.3%
Q1-4. Code Enforcement	8.0%	92.0%
Q1-5. Police Patrol	32.0%	68.0%
Q1-6. Police Emergency Response	13.3%	86.7%
Q1-7. Fire Emergency Response	10.7%	89.3%
Q1-8. Village Hall (Front Desk)	18.7%	81.3%
Q1-9. Streets & Grounds	34.7%	65.3%

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=64)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q1-1. Building Inspections	70.0%	15.0%	5.0%	5.0%	0.0%	5.0%
Q1-2. Fire Inspections	77.1%	18.8%	2.1%	0.0%	0.0%	2.1%
Q1-3. Planning & Zoning	57.1%	28.6%	7.1%	7.1%	0.0%	0.0%
Q1-4. Code Enforcement	83.3%	16.7%	0.0%	0.0%	0.0%	0.0%
Q1-5. Police Patrol	83.3%	8.3%	8.3%	0.0%	0.0%	0.0%
Q1-6. Police Emergency Response	80.0%	10.0%	10.0%	0.0%	0.0%	0.0%
Q1-7. Fire Emergency Response	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Q1-8. Village Hall (Front Desk)	64.3%	35.7%	0.0%	0.0%	0.0%	0.0%
Q1-9. Streets & Grounds	57.7%	19.2%	7.7%	3.8%	11.5%	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=64)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q1-1. Building Inspections	73.7%	15.8%	5.3%	5.3%	0.0%
Q1-2. Fire Inspections	78.7%	19.1%	2.1%	0.0%	0.0%
Q1-3. Planning & Zoning	57.1%	28.6%	7.1%	7.1%	0.0%
Q1-4. Code Enforcement	83.3%	16.7%	0.0%	0.0%	0.0%
Q1-5. Police Patrol	83.3%	8.3%	8.3%	0.0%	0.0%
Q1-6. Police Emergency Response	80.0%	10.0%	10.0%	0.0%	0.0%
Q1-7. Fire Emergency Response	100.0%	0.0%	0.0%	0.0%	0.0%
Q1-8. Village Hall (Front Desk)	64.3%	35.7%	0.0%	0.0%	0.0%
Q1-9. Streets & Grounds	57.7%	19.2%	7.7%	3.8%	11.5%

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	7	9.3 %
Fire Inspections	6	8.0 %
Planning & Zoning	4	5.3 %
Code Enforcement	3	4.0 %
Police Patrol	25	33.3 %
Police Emergency Response	7	9.3 %
Fire Emergency Response	7	9.3 %
Village Hall (Front Desk)	1	1.3 %
Streets & Grounds	12	16.0 %
None chosen	3	4.0 %
Total	75	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	6	8.0 %
Fire Inspections	5	6.7 %
Planning & Zoning	4	5.3 %
Code Enforcement	6	8.0 %
Police Patrol	10	13.3 %
Police Emergency Response	17	22.7 %
Fire Emergency Response	13	17.3 %
Village Hall (Front Desk)	2	2.7 %
Streets & Grounds	5	6.7 %
None chosen	7	9.3 %
Total	75	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
Fire Inspections	5	6.7 %
Planning & Zoning	5	6.7 %
Code Enforcement	5	6.7 %
Police Patrol	11	14.7 %
Police Emergency Response	5	6.7 %
Fire Emergency Response	13	17.3 %
Village Hall (Front Desk)	4	5.3 %
Streets & Grounds	13	17.3 %
None chosen	14	18.7 %
Total	75	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	13	17.3 %
Fire Inspections	16	21.3 %
Planning & Zoning	13	17.3 %
Code Enforcement	14	18.7 %
Police Patrol	46	61.3 %
Police Emergency Response	29	38.7 %
Fire Emergency Response	33	44.0 %
Village Hall (Front Desk)	7	9.3 %
Streets & Grounds	30	40.0 %
None chosen	3	4.0 %
Total	204	

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 to your business by Village

	Number	Percent
Significantly higher than your expectations	7	9.3 %
Higher than your expectations	19	25.3 %
Meets your expectations	41	54.7 %
Below your expectations	2	2.7 %
Don't know	6	8.0 %
Total	75	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 to your business by Village

	Number	Percent
Significantly higher than your expectations	7	10.1 %
Higher than your expectations	19	27.5 %
Meets your expectations	41	59.4 %
Below your expectations	2	2.9 %
Total	69	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=75)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q4-1. Supporting business growth & development	25.3%	25.3%	21.3%	6.7%	6.7%	14.7%
Q4-2. Availability of employee & customer parking around your business	33.3%	29.3%	12.0%	9.3%	8.0%	8.0%
Q4-3. Condition of sidewalks	34.7%	32.0%	20.0%	4.0%	1.3%	8.0%
Q4-4. Creating & promoting special events	29.3%	33.3%	18.7%	2.7%	2.7%	13.3%
Q4-5. Historic preservation efforts	30.7%	37.3%	14.7%	2.7%	1.3%	13.3%
Q4-6. Cleanliness of Village streets & public areas	54.7%	33.3%	6.7%	2.7%	0.0%	2.7%
Q4-7. Landscape maintenance in rights of way & public areas	56.0%	30.7%	5.3%	1.3%	2.7%	4.0%

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=75)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q4-1. Supporting business growth & development	29.7%	29.7%	25.0%	7.8%	7.8%
Q4-2. Availability of employee & customer parking around your business	36.2%	31.9%	13.0%	10.1%	8.7%
Q4-3. Condition of sidewalks	37.7%	34.8%	21.7%	4.3%	1.4%
Q4-4. Creating & promoting special events	33.8%	38.5%	21.5%	3.1%	3.1%
Q4-5. Historic preservation efforts	35.4%	43.1%	16.9%	3.1%	1.5%
Q4-6. Cleanliness of Village streets & public areas	56.2%	34.2%	6.8%	2.7%	0.0%
Q4-7. Landscape maintenance in rights of way & public areas	58.3%	31.9%	5.6%	1.4%	2.8%

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=75)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q5-1. Overall image of Village	53.3%	34.7%	2.7%	5.3%	1.3%	2.7%
Q5-2. Overall quality of life	60.0%	28.0%	6.7%	0.0%	0.0%	5.3%
Q5-3. Overall feeling of safety	64.0%	33.3%	1.3%	0.0%	0.0%	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=75)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q5-1. Overall image of Village	54.8%	35.6%	2.7%	5.5%	1.4%
Q5-2. Overall quality of life	63.4%	29.6%	7.0%	0.0%	0.0%
Q5-3. Overall feeling of safety	64.9%	33.8%	1.4%	0.0%	0.0%

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	38	50.7 %
Likely	18	24.0 %
Somewhat likely	12	16.0 %
Not likely	6	8.0 %
Not likely at all	1	1.3 %
Total	75	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 best describes overall business atmosphere in Village today, compared to two years ago

	Number	Percent
Better	22	29.3 %
No change, but good	30	40.0 %
No change, but poor	6	8.0 %
Worse	6	8.0 %
Don't know	11	14.7 %
Total	75	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 best describes overall business atmosphere in Village today, compared to two years ago

	Number	Percent
Better	22	34.4 %
No change, but good	30	46.9 %
No change, but poor	6	9.4 %
Worse	6	9.4 %
Total	64	100.0 %

Q8. How would you rate your satisfaction with the following in Pinehurst compared to other places you have operated a business in the past?

(N=75)

	Significant-ly better	Better	Same	Worse	Significant-ly worse	No opinion
Q8-1. Overall quality of life	24.0%	26.7%	18.7%	2.7%	2.7%	25.3%
Q8-2. Overall quality of Village services	14.7%	34.7%	20.0%	5.3%	0.0%	25.3%
Q8-3. Customer service provided by Village employees	20.0%	22.7%	22.7%	2.7%	0.0%	32.0%

WITHOUT NO OPINION

Q8. How would you rate your satisfaction with the following in Pinehurst compared to other places you have operated a business in the past? (without "no opinion")

(N=75)

	Significantl-y better	Better	Same	Worse	Significantl-y worse
Q8-1. Overall quality of life	32.1%	35.7%	25.0%	3.6%	3.6%
Q8-2. Overall quality of Village services	19.6%	46.4%	26.8%	7.1%	0.0%
Q8-3. Customer service provided by Village employees	29.4%	33.3%	33.3%	3.9%	0.0%

Q9. Customer Service. Overall, how would you rate the Village of Pinehurst customer service? Would you say it is...

Q9. How would you rate overall Village customer service	Number	Percent
Very good	23	30.7 %
Good	31	41.3 %
Poor	2	2.7 %
Don't know	19	25.3 %
Total	75	100.0 %

WITHOUT DON'T KNOW

Q9. Customer Service. Overall, how would you rate the Village of Pinehurst customer service? Would you say it is... (without "don't know")

Q9. How would you rate overall Village customer service	Number	Percent
Very good	23	41.1 %
Good	31	55.4 %
Poor	2	3.6 %
Total	56	100.0 %

Q10. 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=75)

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Don't know
Q10-1. Village staff was responsive to my needs	25.3%	29.3%	9.3%	2.7%	0.0%	33.3%
Q10-2. Village staff was competent	26.7%	28.0%	12.0%	0.0%	0.0%	33.3%
Q10-3. Village staff was courteous	34.7%	24.0%	9.3%	0.0%	0.0%	32.0%
Q10-4. My issue was resolved promptly	26.7%	22.7%	13.3%	1.3%	1.3%	34.7%

WITHOUT DON'T KNOW

Q10. 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=75)

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
Q10-1. Village staff was responsive to my needs	38.0%	44.0%	14.0%	4.0%	0.0%
Q10-2. Village staff was competent	40.0%	42.0%	18.0%	0.0%	0.0%
Q10-3. Village staff was courteous	51.0%	35.3%	13.7%	0.0%	0.0%
Q10-4. My issue was resolved promptly	40.8%	34.7%	20.4%	2.0%	2.0%

Q11. Communication. Overall, how satisfied are you with the job the Village of Pinehurst does communicating with business owners? Would you say you are...

Q11. How satisfied are you with overall job

<u>Village does communicating with business owners</u>	<u>Number</u>	<u>Percent</u>
Very satisfied	19	25.3 %
Satisfied	33	44.0 %
Neutral	13	17.3 %
Dissatisfied	5	6.7 %
Very dissatisfied	1	1.3 %
Don't know	4	5.3 %
Total	75	100.0 %

WITHOUT DON'T KNOW

Q11. 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")

Q11. How satisfied are you with overall job

<u>Village does communicating with business owners</u>	<u>Number</u>	<u>Percent</u>
Very satisfied	19	26.8 %
Satisfied	33	46.5 %
Neutral	13	18.3 %
Dissatisfied	5	7.0 %
Very dissatisfied	1	1.4 %
Total	71	100.0 %

Q12. Have you visited the Village's website (vopnc.org) during the last 12 months?

Q12. Have you visited Village's website (vopnc.org) during last 12 months

	Number	Percent
Yes	40	53.3 %
No	35	46.7 %
Total	75	100.0 %

Q12a. 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=40)

	Very good	Good	Average	Very poor
Q12a-1. Easy to navigate	32.5%	50.0%	15.0%	2.5%
Q12a-2. Availability of information about Village services	30.0%	45.0%	25.0%	0.0%

Q12b. Overall, how satisfied would you say you were with the Village of Pinehurst Website? Would you say you were...

Q12b. How satisfied were you with Village website

	Number	Percent
Very satisfied	10	25.0 %
Satisfied	22	55.0 %
Neutral	6	15.0 %
Dissatisfied	2	5.0 %
Total	40	100.0 %

Q13. Have you used the Village's mobile app (MY VOP) during the last 12 months?

Q13. Have you used Village's mobile app (MY VOP) during last 12 months	Number	Percent
Yes	8	10.7 %
No	67	89.3 %
Total	75	100.0 %

Q13a. Overall, how satisfied would you say you were with the Village mobile app, MY VOP? Would you say you were...

Q13a. How satisfied were you with Village mobile app, MY VOP	Number	Percent
Very satisfied	2	25.0 %
Satisfied	4	50.0 %
Neutral	1	12.5 %
Don't know	1	12.5 %
Total	8	100.0 %

WITHOUT DON'T KNOW

Q13a. Overall, how satisfied would you say you were with the Village mobile app, MY VOP? Would you say you were... (without "don't know")

Q13a. How satisfied were you with Village mobile app, MY VOP	Number	Percent
Very satisfied	2	28.6 %
Satisfied	4	57.1 %
Neutral	1	14.3 %
Total	7	100.0 %

Q14. Please indicate which of the following are the best ways for the Village to communicate with you to get important information to your business.

Q14. What are best ways for Village to communicate with you to get important information to your business

	Number	Percent
Direct mail	30	40.0 %
Village website	21	28.0 %
Email (monthly business e-news)	54	72.0 %
Workshops/business forums	6	8.0 %
Social media	18	24.0 %
Personal calls/visits	21	28.0 %
Newsletters	21	28.0 %
Brochures	8	10.7 %
MY VOP mobile app	3	4.0 %
Other	2	2.7 %
Total	184	

Q14-10. Other

Q14-10. Other	Number	Percent
Direct emails	1	50.0 %
Text	1	50.0 %
Total	2	100.0 %

Q15. 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=75)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q15-1. Zoning ordinances	17.3%	32.0%	17.3%	2.7%	1.3%	29.3%
Q15-2. Business signage regulations	20.0%	29.3%	21.3%	5.3%	5.3%	18.7%
Q15-3. Historic district guidelines	21.3%	33.3%	20.0%	2.7%	0.0%	22.7%

WITHOUT DON'T KNOW

Q15. 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=75)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q15-1. Zoning ordinances	24.5%	45.3%	24.5%	3.8%	1.9%
Q15-2. Business signage regulations	24.6%	36.1%	26.2%	6.6%	6.6%
Q15-3. Historic district guidelines	27.6%	43.1%	25.9%	3.4%	0.0%

Q16. 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=75)

	Positive impact	No impact	Negative impact	Don't know
Q16-1. Farmer's Markets	53.3%	42.7%	1.3%	2.7%
Q16-2. Live After Five Concerts	48.0%	42.7%	2.7%	6.7%
Q16-3. Parades (e.g. Fourth of July, St. Patrick's Day, US Kids)	52.0%	41.3%	1.3%	5.3%
Q16-4. Holly Arts & Crafts Festival	62.7%	30.7%	2.7%	4.0%
Q16-5. Tree Lighting	52.0%	42.7%	1.3%	4.0%
Q16-6. Shakespeare in the Pines	37.3%	53.3%	1.3%	8.0%
Q16-7. Sandhills Motoring Festival	50.7%	42.7%	1.3%	5.3%
Q16-8. Other cultural activities (e.g. performing arts)	54.7%	38.7%	0.0%	6.7%

WITHOUT DON'T KNOW

Q16. 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=75)

	Positive impact	No impact	Negative impact
Q16-1. Farmer's Markets	54.8%	43.8%	1.4%
Q16-2. Live After Five Concerts	51.4%	45.7%	2.9%
Q16-3. Parades (e.g. Fourth of July, St. Patrick's Day, US Kids)	54.9%	43.7%	1.4%
Q16-4. Holly Arts & Crafts Festival	65.3%	31.9%	2.8%
Q16-5. Tree Lighting	54.2%	44.4%	1.4%
Q16-6. Shakespeare in the Pines	40.6%	58.0%	1.4%
Q16-7. Sandhills Motoring Festival	53.5%	45.1%	1.4%
Q16-8. Other cultural activities (e.g. performing arts)	58.6%	41.4%	0.0%

Q17. 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)?

Q17. How satisfied are you with the way Village handles events that attract large crowds to Village

	Number	Percent
Very satisfied	29	38.7 %
Satisfied	23	30.7 %
Neutral	11	14.7 %
Dissatisfied	3	4.0 %
Very dissatisfied	1	1.3 %
Don't know	8	10.7 %
Total	75	100.0 %

WITHOUT DON'T KNOW

Q17. 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")

Q17. How satisfied are you with the way Village handles events that attract large crowds to Village

	Number	Percent
Very satisfied	29	43.3 %
Satisfied	23	34.3 %
Neutral	11	16.4 %
Dissatisfied	3	4.5 %
Very dissatisfied	1	1.5 %
Total	67	100.0 %

Q18. 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=75)

	Extremely important	Very important	Important	Less important	Not important	Not provided
Q18-1. Overall image of Village	46.7%	29.3%	8.0%	1.3%	10.7%	4.0%
Q18-2. Safety & security	66.7%	17.3%	9.3%	0.0%	2.7%	4.0%
Q18-3. Availability of trained employees	29.3%	22.7%	17.3%	8.0%	16.0%	6.7%
Q18-4. Low property tax rate	36.0%	24.0%	12.0%	4.0%	17.3%	6.7%
Q18-5. Quality healthcare	45.3%	17.3%	10.7%	5.3%	16.0%	5.3%
Q18-6. Affordable rent	50.7%	18.7%	12.0%	2.7%	8.0%	8.0%
Q18-7. Proximity to family or friends	33.3%	21.3%	13.3%	5.3%	17.3%	9.3%
Q18-8. Quality of public education	37.3%	20.0%	12.0%	4.0%	16.0%	10.7%
Q18-9. Overall quality of life in Village	54.7%	22.7%	5.3%	2.7%	6.7%	8.0%

WITHOUT DON'T KNOW

Q18. 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=75)

	Extremely important	Very important	Important	Less important	Not important
Q18-1. Overall image of Village	48.6%	30.6%	8.3%	1.4%	11.1%
Q18-2. Safety & security	69.4%	18.1%	9.7%	0.0%	2.8%
Q18-3. Availability of trained employees	31.4%	24.3%	18.6%	8.6%	17.1%
Q18-4. Low property tax rate	38.6%	25.7%	12.9%	4.3%	18.6%
Q18-5. Quality healthcare	47.9%	18.3%	11.3%	5.6%	16.9%
Q18-6. Affordable rent	55.1%	20.3%	13.0%	2.9%	8.7%
Q18-7. Proximity to family or friends	36.8%	23.5%	14.7%	5.9%	19.1%
Q18-8. Quality of public education	41.8%	22.4%	13.4%	4.5%	17.9%
Q18-9. Overall quality of life in Village	59.4%	24.6%	5.8%	2.9%	7.2%

Q19. What are the most important issues facing Pinehurst today?

- Balancing need for growth and keeping history. Forward thinking i.e. food trucks.
- Changing demographics and meeting the needs of all community members.
- Controlling traffic.
- COVID-19.
- COVID-19.
- COVID-19.
- COVID-19.
- COVID-19.
- COVID-19, transparency of confirmed cases, hospitalizations, deaths.
- COVID-19 and masks. Everyone on the same page; City, business, and customers.
- Creating more business and operating after 5pm.
- Government.
- Growing responsibility, managing traffic.
- Growth and traffic at times is too heavy.
- High rents keep out small businesses.
- I object to the recent signage reserving certain parking areas for retail and/or restaurant patrons only. Very discriminatory.
- Infrastructure and growth.
- Isolation to rest of the country and what is going on, is a positive.
- Keep sense of community but do it safely.
- Losing my business to COVID, outdoor dining should have happened months ago for every day.
- Maintaining the balance between a historic, quaint village, and modern business needs. We are moving in the right direction by all counts.
- Managing growth and traffic while staying competitive with other resort areas. Keeping the quaintness of the village while providing products and services demanded by customers.
- Near parking garage facility in Village.
- No motivation to create an "unforgettable" experience for those coming to the area. It's cute, it's so quaint, are referring to the buildings that have no life.
- Over population.
- Parking.
- Parking.
- Parking downtown. Tell the workforce to use the lot and not the parking spaces.
- Parking for large events.
- Parking in the village.
- Parking, lack of retail stores, COVID-19.
- Stuck on the historic. We also need to embrace growth and progress.
- Too much build up and construction in area population and expansion. Not quaint village anymore.
- Traffic flow into area.
- Traffic on Hwy 5 and Morganton and parking in the Village.

Q20. Do you have any suggestions for how the Village could serve your business better?

- Be more pro-development. Do not resist change.
- Better communication via social media and via the VOP website. Trying to find information on events on the website is near impossible as the calendar does not reflect much else beside the farmers market. Better coverage of what's going on in and around the village via social media goes a long way too, on a lot of important events and topics, your social media falls silent.
- Broadcast text of important information on a weekly basis or in response to an emergency situation.
- Can't drive down Hwy 5.
- Commercial trash pickup needed, I don't understand why I need to pay for a private service or take items to the dump myself.
- Education, business specific.
- Embrace progress like Charleston.
- Fair Barn communication for events.
- Finally making strides in 2020.
- Have business employees park outside Chinquapin, Market, Magnolia.
- I am a new business and would like to know ways to promote my business.
- Make all parking "first come, first served".
- Make traffic flow better by my business.
- More business opportunities.
- My clients have trouble finding parking and they are not retail shopping. New signs block spaces.
- Need more retail, enforce visitor sign parking.
- Parking.
- Pursue business growth, stop letting Southern Pines and Aberdeen capture all new business ventures.
- Return to public events as soon as COVID is contained. My marketing depends largely on face to face interactions with locals.
- The village is far removed from us. They only are geared to retail.
- They need to interact more with small business.
- Timely code applications acceptance reviews for tree removal.
- Use local sign shops for events. The one behind the police station.
- Yes, no politics. Meet with the owners/managers of the shops and ask this question. Better yet, give them some authority to create positive change.
- Yes, street dining Monday-Sunday.

Q21. Business Category. Please indicate the primary business category of your business.

Q21. Primary business category of your business	Number	Percent
Retail	10	13.3 %
Restaurants & food services	7	9.3 %
Inn	2	2.7 %
Professional, scientific, & technical services	12	16.0 %
Financial & insurance	11	14.7 %
Real estate & rental leasing	5	6.7 %
Health care & social assistance	14	18.7 %
Arts, entertainment, & recreation	4	5.3 %
Other	8	10.7 %
Not provided	2	2.7 %
Total	75	100.0 %

WITHOUT NOT PROVIDED

Q21. Business Category. Please indicate the primary business category of your business. (without "not provided")

Q21. Primary business category of your business	Number	Percent
Retail	10	13.7 %
Restaurants & food services	7	9.6 %
Inn	2	2.7 %
Professional, scientific, & technical services	12	16.4 %
Financial & insurance	11	15.1 %
Real estate & rental leasing	5	6.8 %
Health care & social assistance	14	19.2 %
Arts, entertainment, & recreation	4	5.5 %
Other	8	11.0 %
Total	73	100.0 %

Q21-9. Other

Q21-9. Other	Number	Percent
CHARITY FOUNDATION	1	12.5 %
CONSTRUCTION	1	12.5 %
CONSTRUCTION TREE SERVICE	1	12.5 %
Estate liquidation	1	12.5 %
LAUNDRY SERVICE	1	12.5 %
Non-profit cultural organization	2	25.0 %
Travel sales business	1	12.5 %
Total	8	100.0 %

Q22. How many years have you been in operation in the Village of Pinehurst?

Q22. How many years have you been in operation in Pinehurst	Number	Percent
0-5 years	12	16.0 %
6-10 years	11	14.7 %
11-15 years	16	21.3 %
16-20 years	6	8.0 %
20+ years	28	37.3 %
Not provided	2	2.7 %
Total	75	100.0 %

WITHOUT NOT PROVIDED

Q22. How many years have you been in operation in the Village of Pinehurst? (without "not provided")

Q22. How many years have you been in operation in Pinehurst	Number	Percent
0-5 years	12	16.4 %
6-10 years	11	15.1 %
11-15 years	16	21.9 %
16-20 years	6	8.2 %
20+ years	28	38.4 %
Total	73	100.0 %

Q23. Please answer the following questions.

(N=75)

	Yes	No
Q23-1. Are you a member of Pinehurst Business Partners	22.7%	77.3%
Q23-2. Are you a member of Moore County Chamber of Commerce	25.3%	74.7%
Q23-3. Is your business located in Village Center	29.3%	70.7%

Section 4

Survey Instrument



HISTORY, CHARM, AND SOUTHERN HOSPITALITY _____

July 2020

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 Business 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.2020PinehurstBusinessSurvey.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 2020 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



2020 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."**

		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. **How would you rate your satisfaction with the following in Pinehurst compared to other places you have operated a business in the past?**

		Significantly Better	Better	Same	Worse	Significantly Worse	No Opinion
1.	Overall quality of life	5	4	3	2	1	9
2.	Overall quality of Village services	5	4	3	2	1	9
3.	Customer service provided by Village employees	5	4	3	2	1	9

9. **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

10. **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

11. **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

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

(1) Yes [Answer Q12a-b.] (2) No [Skip to Q13.] (9) Don't know [Skip to Q13.]

12a. 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

12b. 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

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

- (1) Yes [Answer Q13a.] (2) No [Skip to Q14.] (9) Don't know [Skip to Q14.]

13a. 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

14. 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

15. 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

16. 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

17. 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

18. 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

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

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

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

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

22. 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

23. 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.