



2021 Village of Pinehurst Business Survey Findings Report

Presented to the Village of Pinehurst,
North Carolina

September 2021



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Executive Summary

2021 Village of Pinehurst Business Survey

Executive Summary



Purpose and Methodology

ETC Institute administered a business survey to businesses in the Village of Pinehurst during the summer of 2021. The survey was administered for the ninth 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).

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Major Findings

Use of Village Services. The Village services that the highest percentage of businesses have used in the past year were: fire inspections (72%), police patrol (39%), streets and grounds (29%), and building inspections (25%).

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%), Village Hall (front desk) (100%), police emergency response (100%), and building inspections (100%).

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 (59%), 2) fire emergency response (56%), 3) police emergency response (43%), and 4) streets and grounds (37%).

Satisfaction with the Overall Quality of Village Services. Forty-four percent (44%) of the businesses surveyed feel the overall quality of services provided by the Village meets their expectations; 42% feel the overall quality of Village services is higher or significantly higher than their expectations. Only 7% feel the overall quality of Village services is below their expectations.

Satisfaction with Various Village Services. Most (92%) of the businesses surveyed who had an opinion indicated that they were satisfied with the cleanliness of streets and public areas; 89% were satisfied with the landscape and maintenance in rights-of-way and public areas, and 86% were satisfied with creating and promoting special events.

Perceptions of the Village. Ninety-two percent (92%) of the businesses surveyed who had an opinion indicated that they were satisfied with the overall feeling of safety in the Village; 92% were satisfied with the overall quality of life, and 89% were satisfied with the overall image of the Village.

Likelihood of Recommending the Village as a Business Location. Eighty-one percent (81%) of businesses would be very likely or likely to recommend the Village as a business location to friends, family and co-workers; 11% 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. Forty-one percent (41%) of businesses feel the overall business atmosphere in the Village is better than two years ago; 33% feel there has been no change, but the atmosphere is good; 5% feel there has been no change, but the atmosphere is poor, and 8% feel the atmosphere is worse.

Village Customer Service. Seventy-eight percent (78%) 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.

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Executive Summary



Level of Agreement with Statements About Customer Service from Village Staff. Ninety-two percent (92%) of the businesses surveyed who had an opinion agreed that the Village staff was courteous during their most recent interaction with them; 90% also agreed that Village staff was responsive to their needs, 86% agreed that Village staff was competent, and 83% agreed that their issue was resolved promptly.

Satisfaction with Village Communications with Businesses. Sixty percent (60%) of businesses were satisfied with the job the Village does communicating with business owners, compared to only 7% who were dissatisfied.

Village Website. Of the 55% of business that visited the Village’s website (www.vopnc.org) during the past 12 months, 82% who had an opinion rated the availability of information on Village services on the website as “very good” or “good,” and 69% felt the website was easy to navigate, and. Overall, 78% 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; 76% of those who have used it indicated they were “very satisfied” or “satisfied.”

Best Ways to Communicate with Businesses. Two-thirds (67%) of businesses indicated that email is one of the best ways for the Village to communicate with them.

Community Development (Codes and Ordinances). Sixty-eight percent (68%) of the businesses who had an opinion were satisfied with historic district guidelines; 62% were satisfied with business signage regulations, and 57% were satisfied with zoning ordinances.

Impact of Various Cultural and Entertainment Opportunities. Forty-four percent (44%) of the businesses surveyed feel the tree lighting in the Village Center has a positive impact on their business; 42% feel the Holly Arts & Crafts Festival has a positive impact; 42% feel cultural activities have a positive impact on their business, and 40% feel Live After Five Concerts have a positive impact on their business.

Satisfaction with the Way the Village handles Events That Attract Large Crowds. Sixty-eight percent (68%) of businesses are satisfied with the way the Village handles events that attract large crowds, compared to only 2% who are dissatisfied.

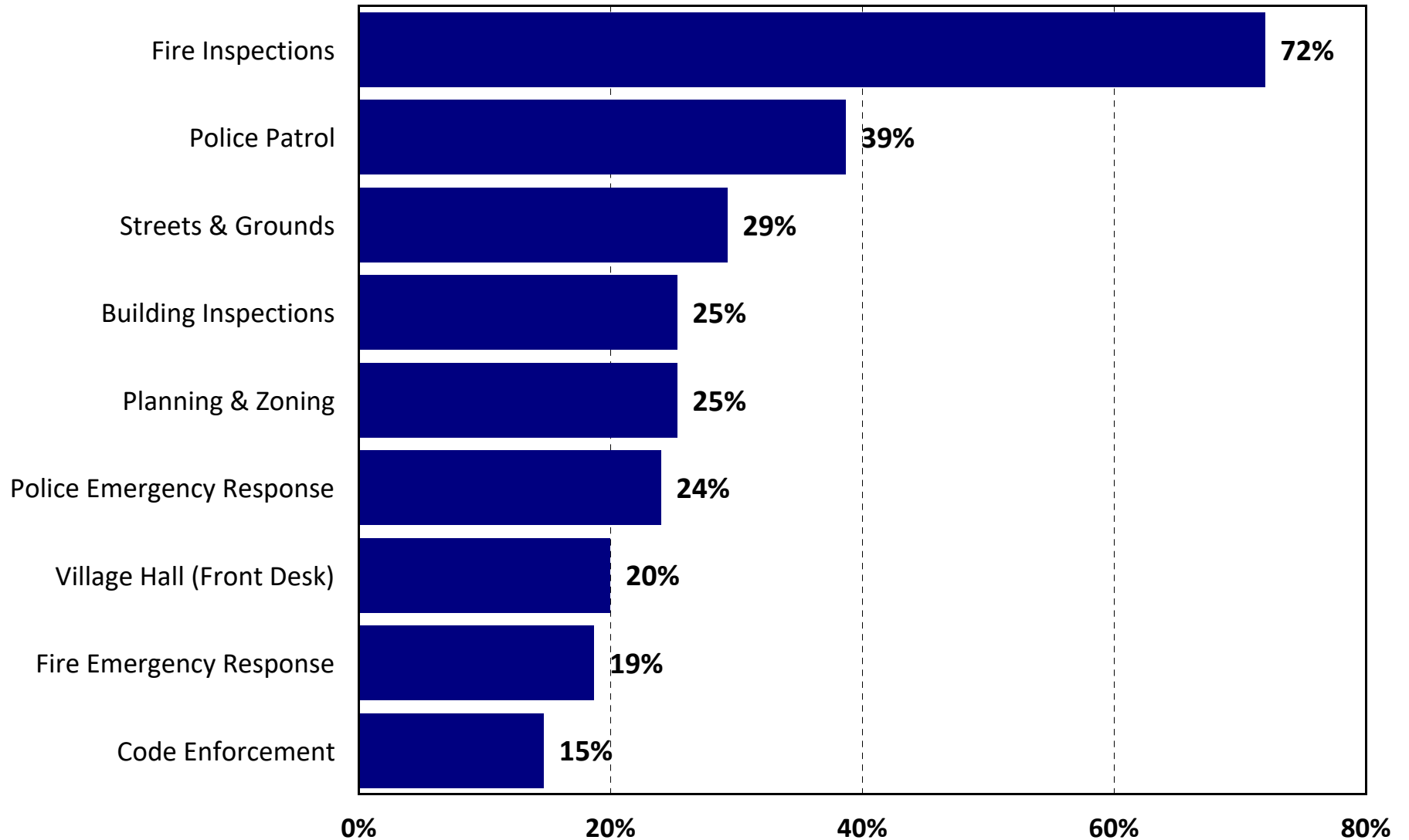
Reasons Influencing Decision to Locate Business in the Village of Pinehurst. Eighty-nine percent (89%) of businesses surveyed indicated safety and security in the Village was either “extremely important” or “very important” in their decision to locate their business in the Village of Pinehurst. The other top reasons included: overall quality of life in the Village (83%) and quality healthcare (79%).



Charts and Graphs:

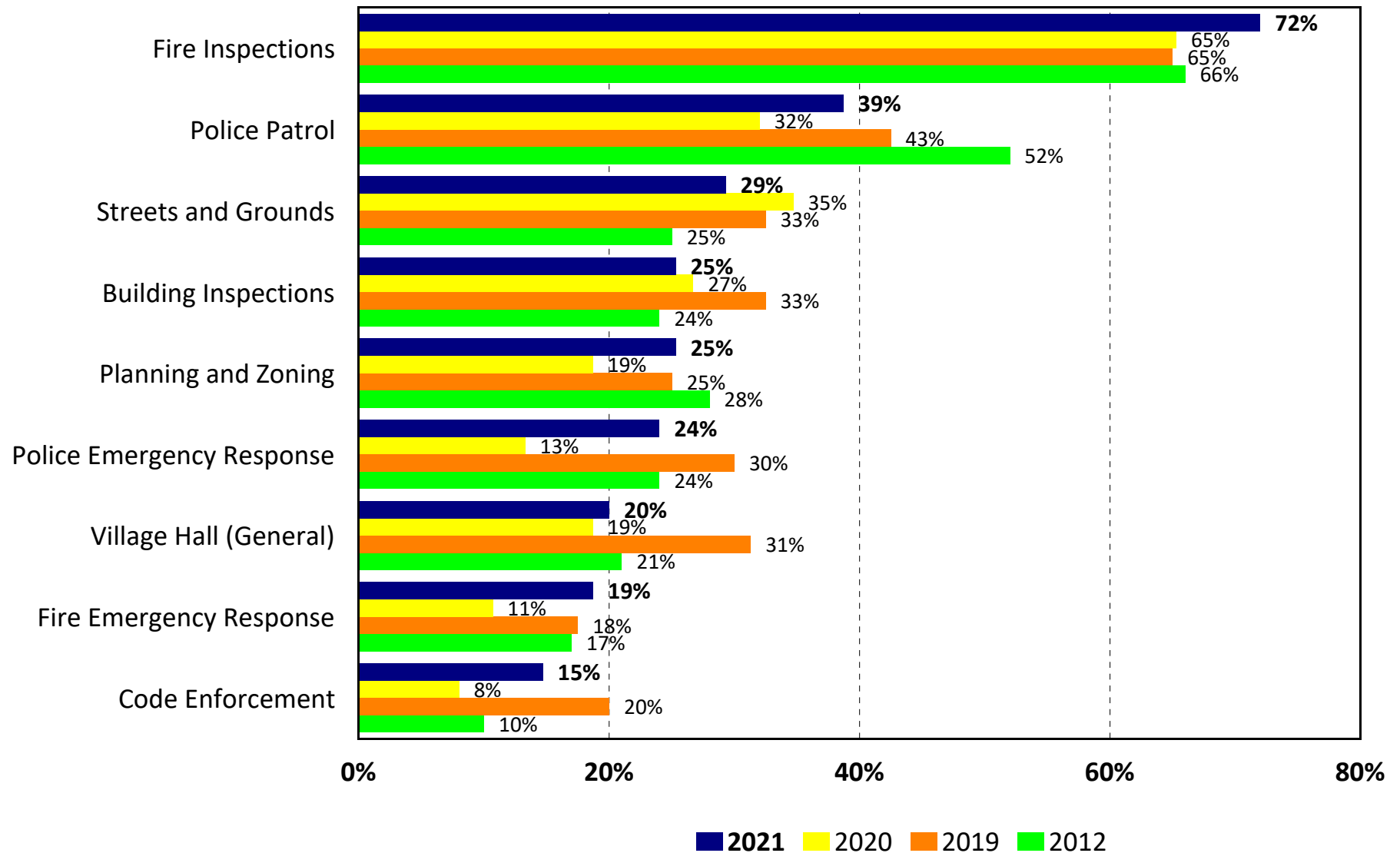
Q1. Have you used this service or department in the past year?

by percentage of respondents who answered “yes”



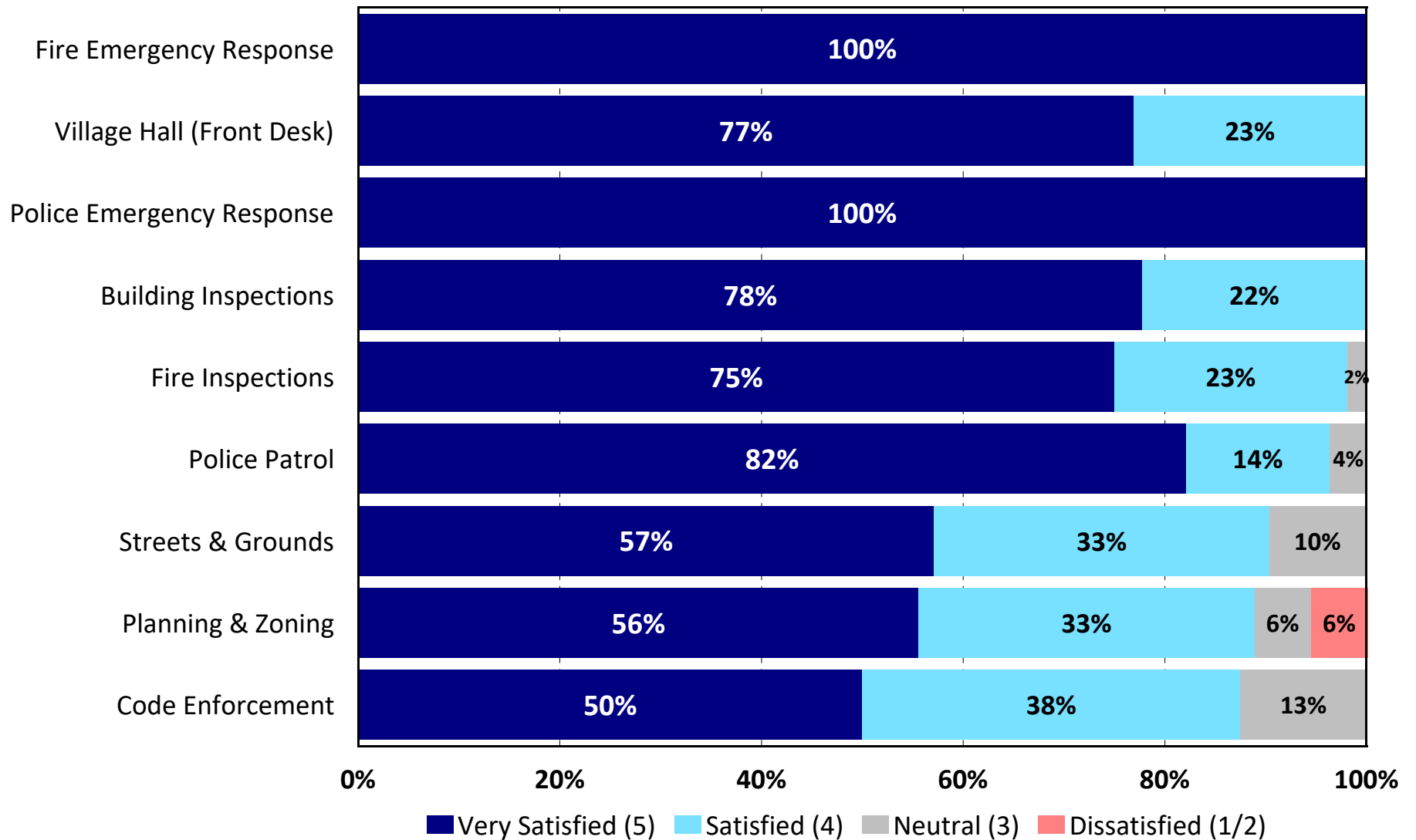
Q1. Have you used this service or department in the past year? - 2012 to 2021

by percentage of respondents who answered "yes"



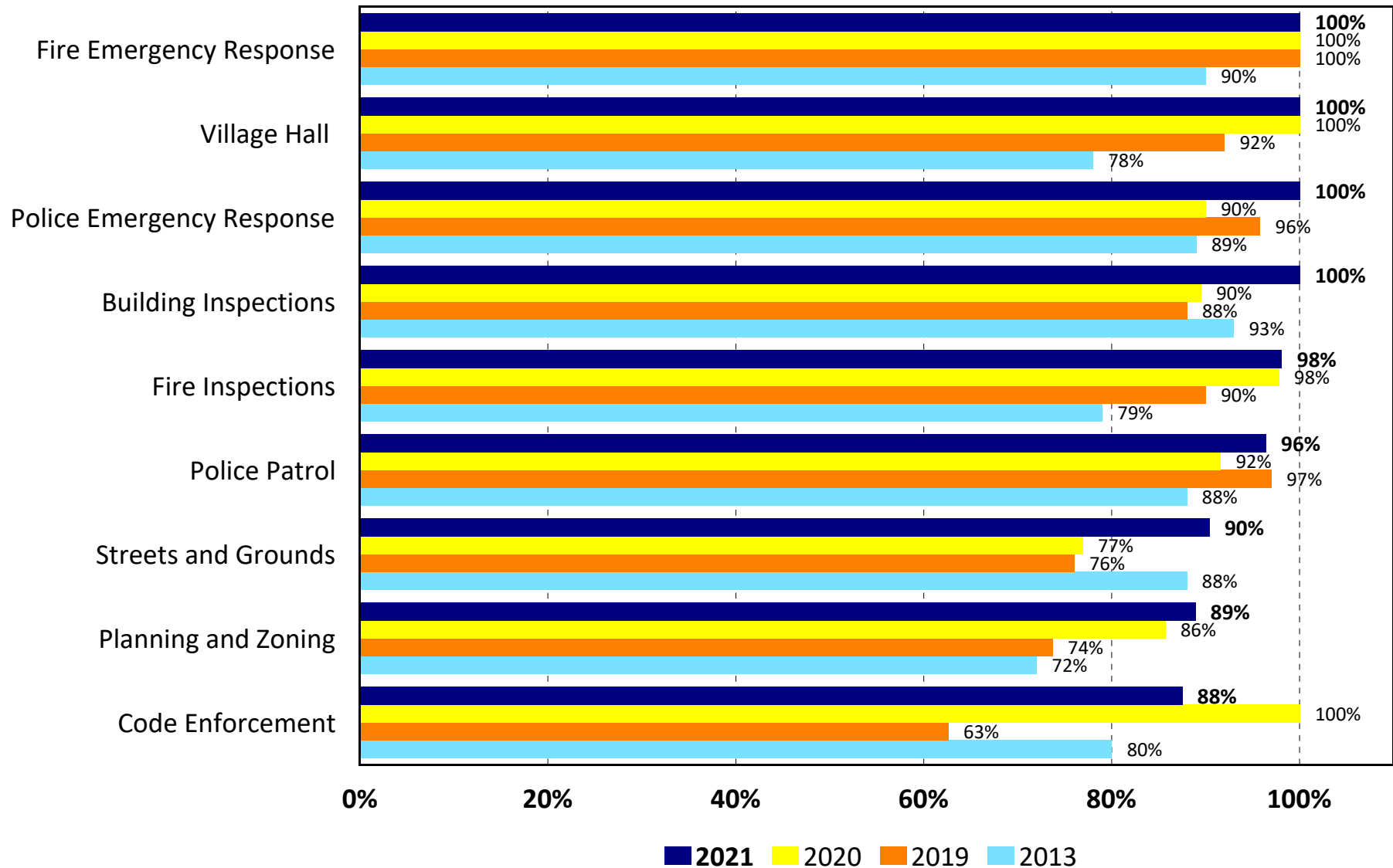
Q1. Overall Satisfaction with Pinehurst Services or Departments Used in the Past Year

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")



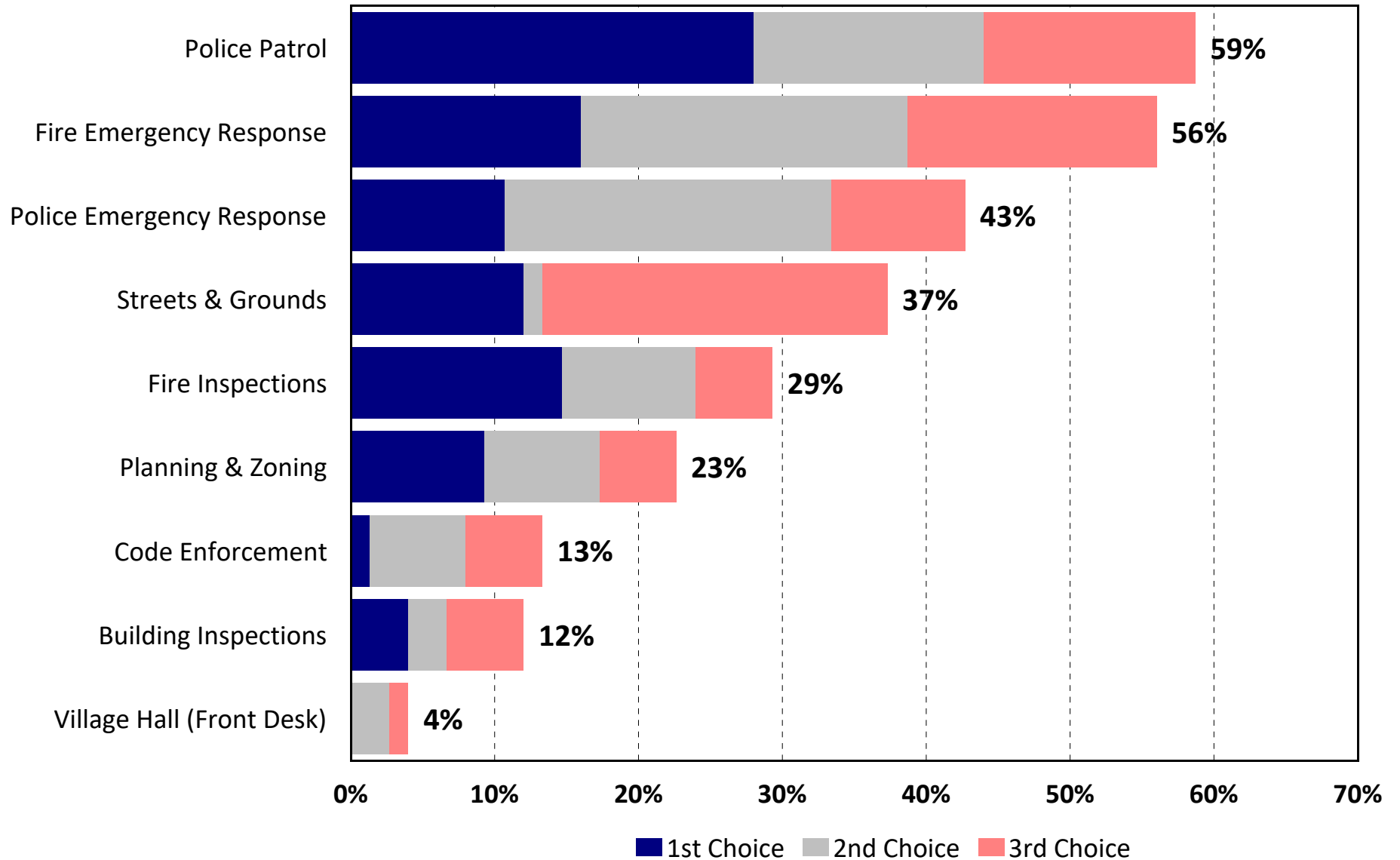
Q1. Overall Satisfaction with Pinehurst Services or Departments Used in the Past Year - 2013 to 2021

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



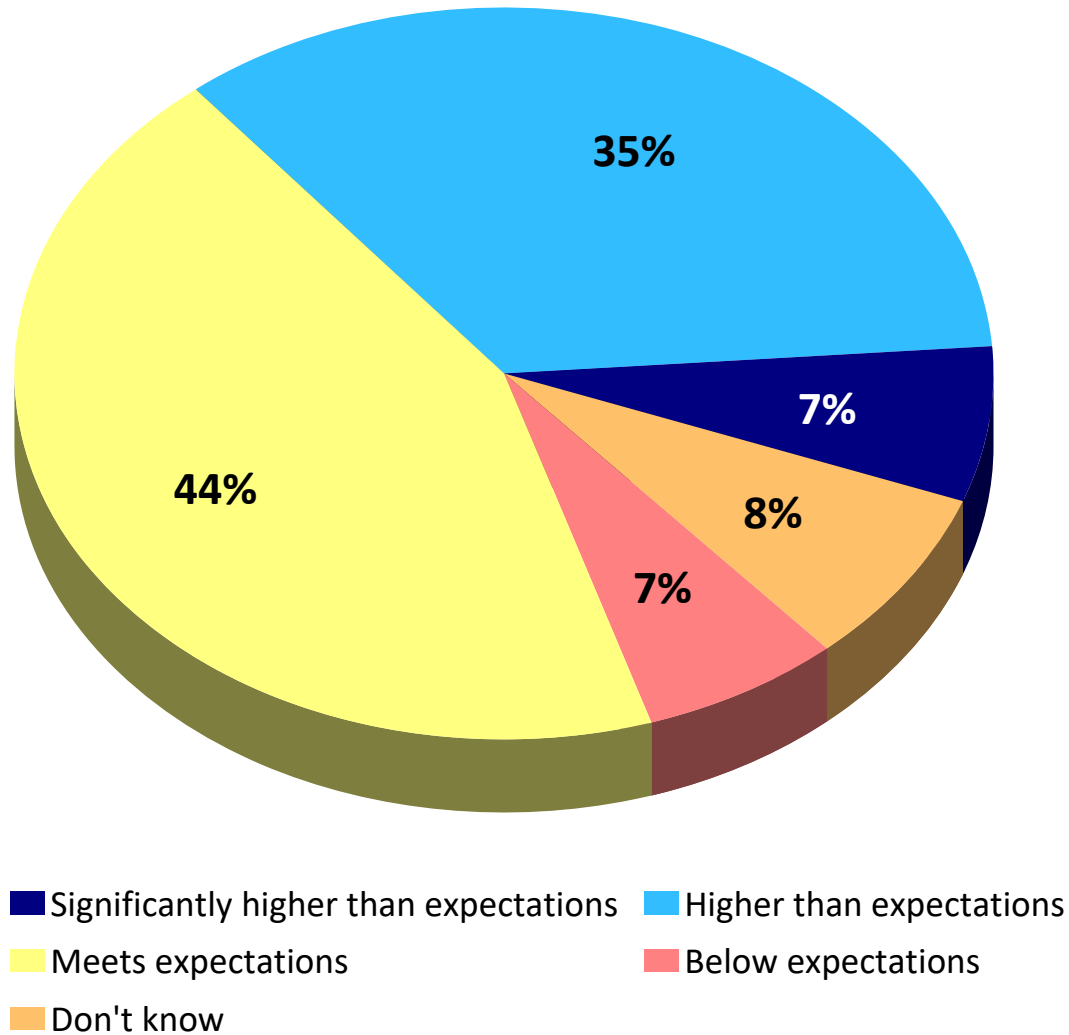
Q2. Village Services or Departments Rated as the Most Important to Their Business

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



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

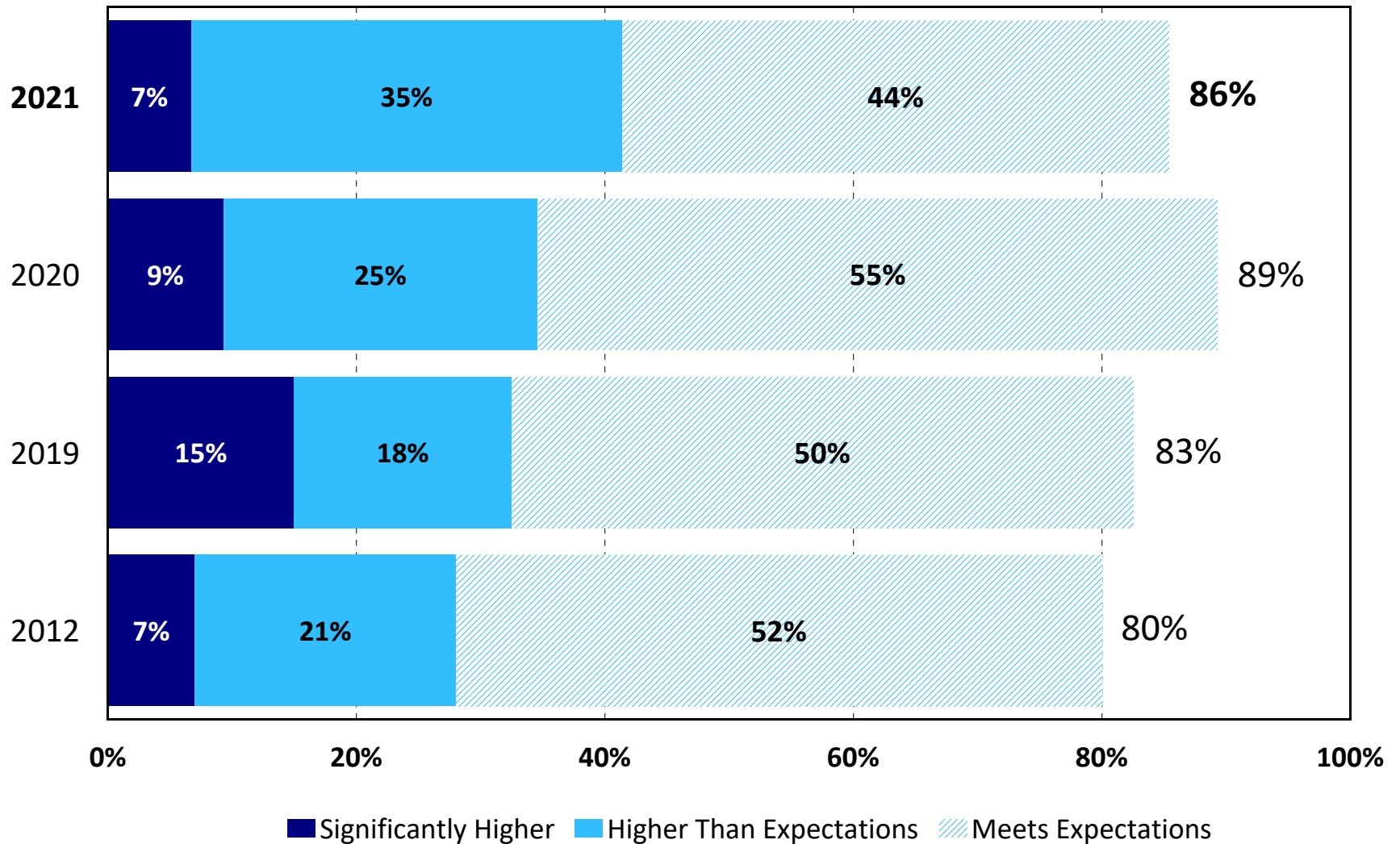
by percentage of respondents



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

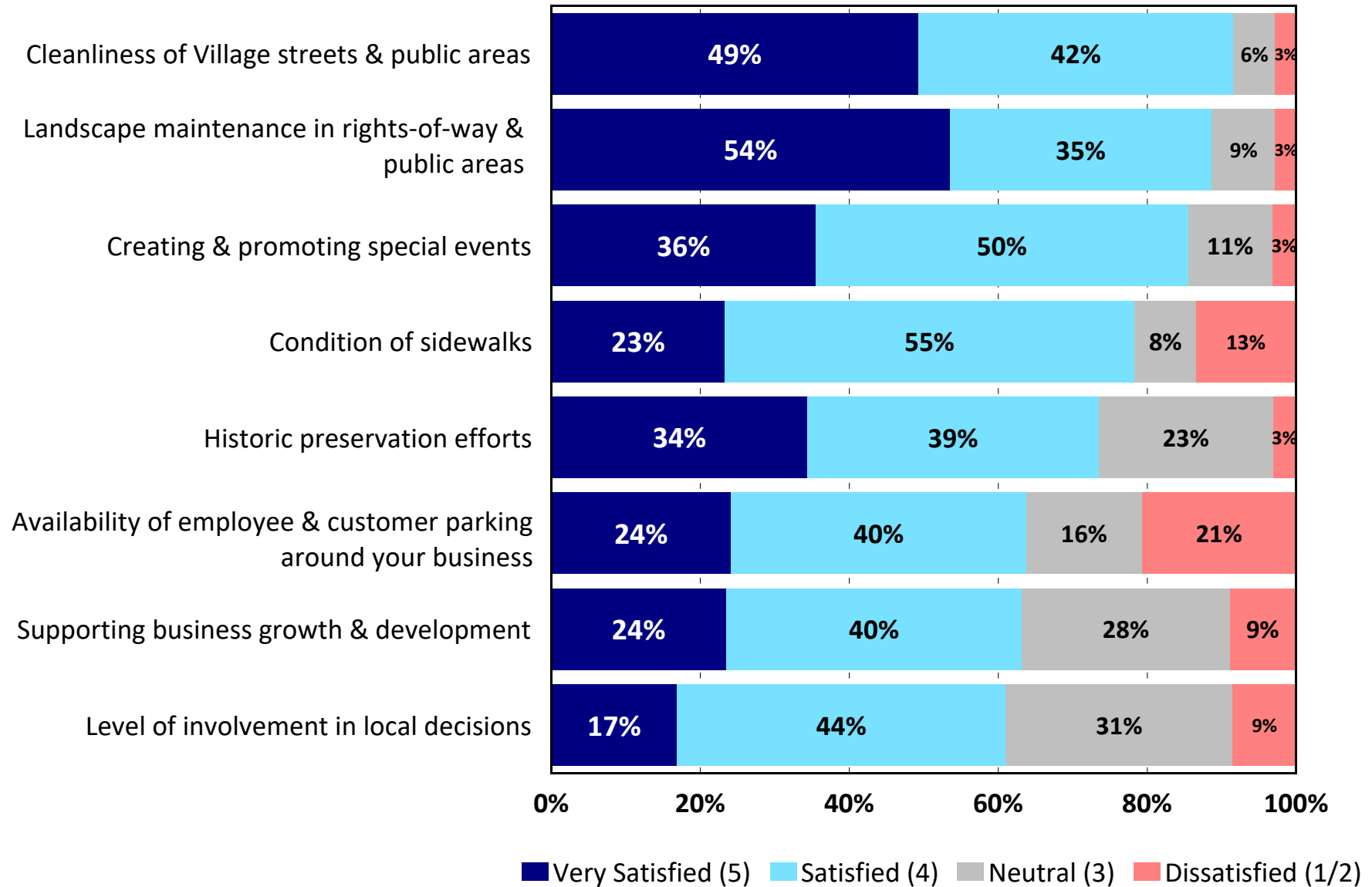
2012 to 2021

by percentage of respondents



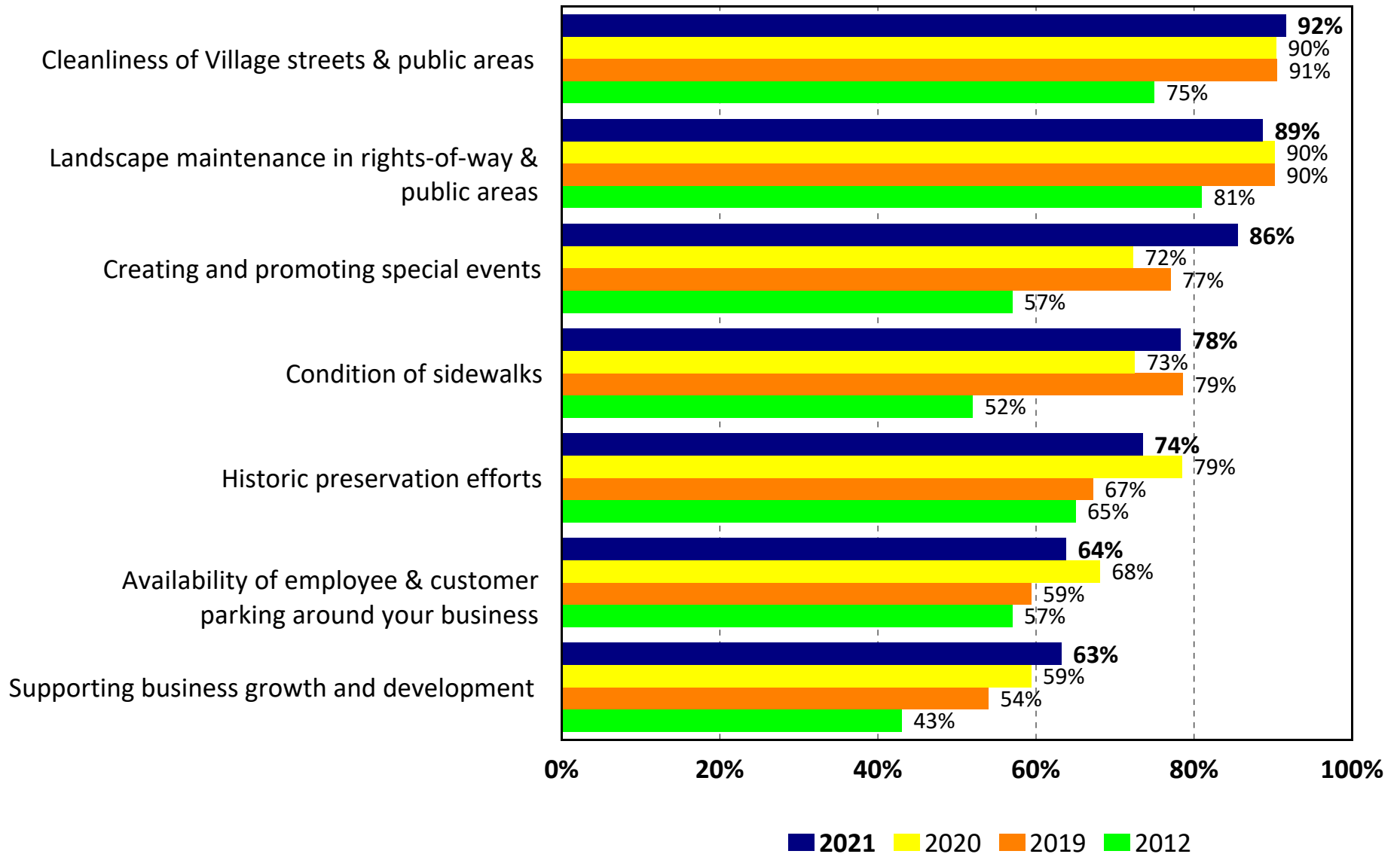
Q4. Level of Satisfaction with the Village in Various Areas

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



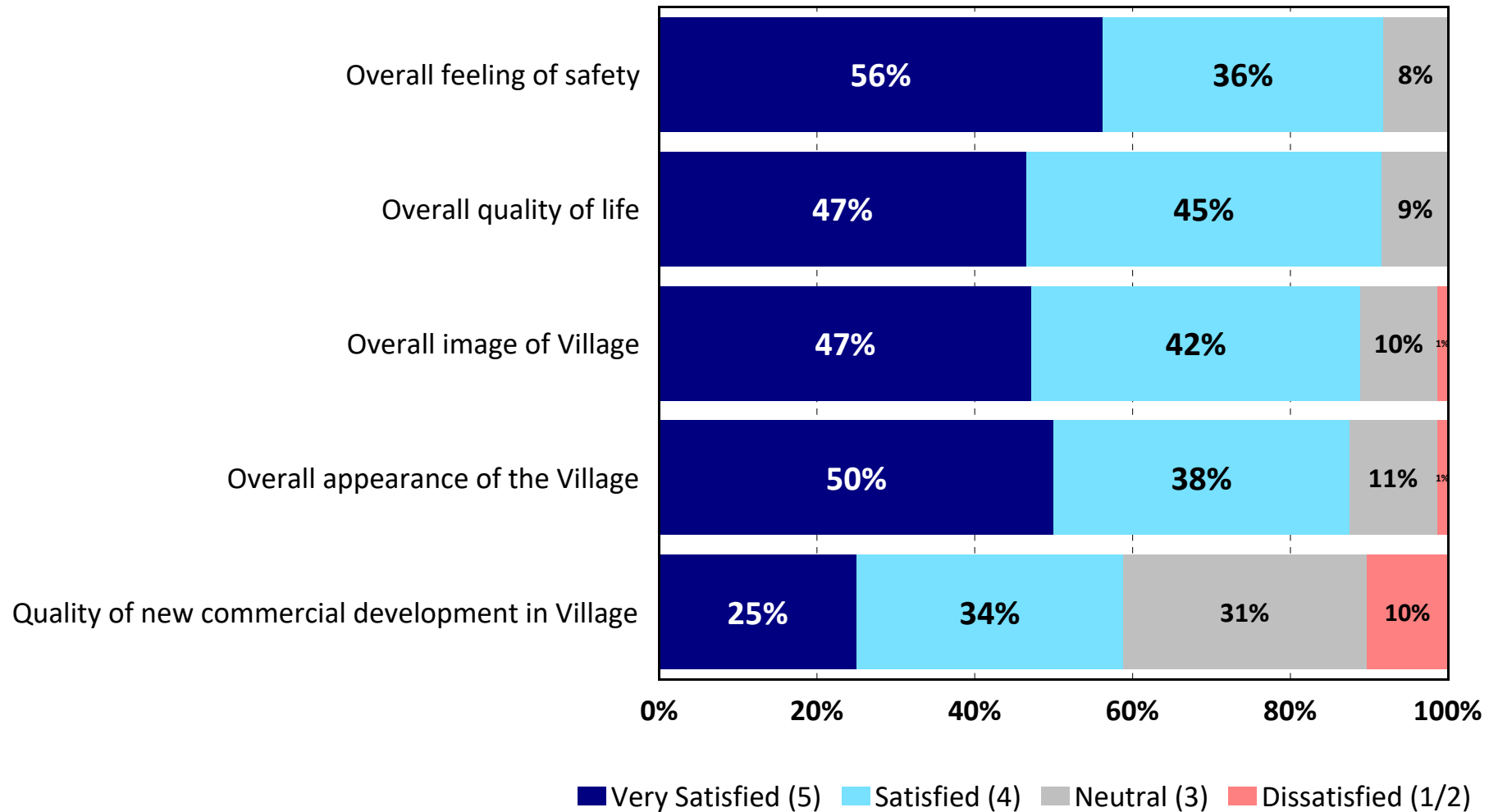
Q4. Level of Satisfaction with the Village in Various Areas 2012 to 2021

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



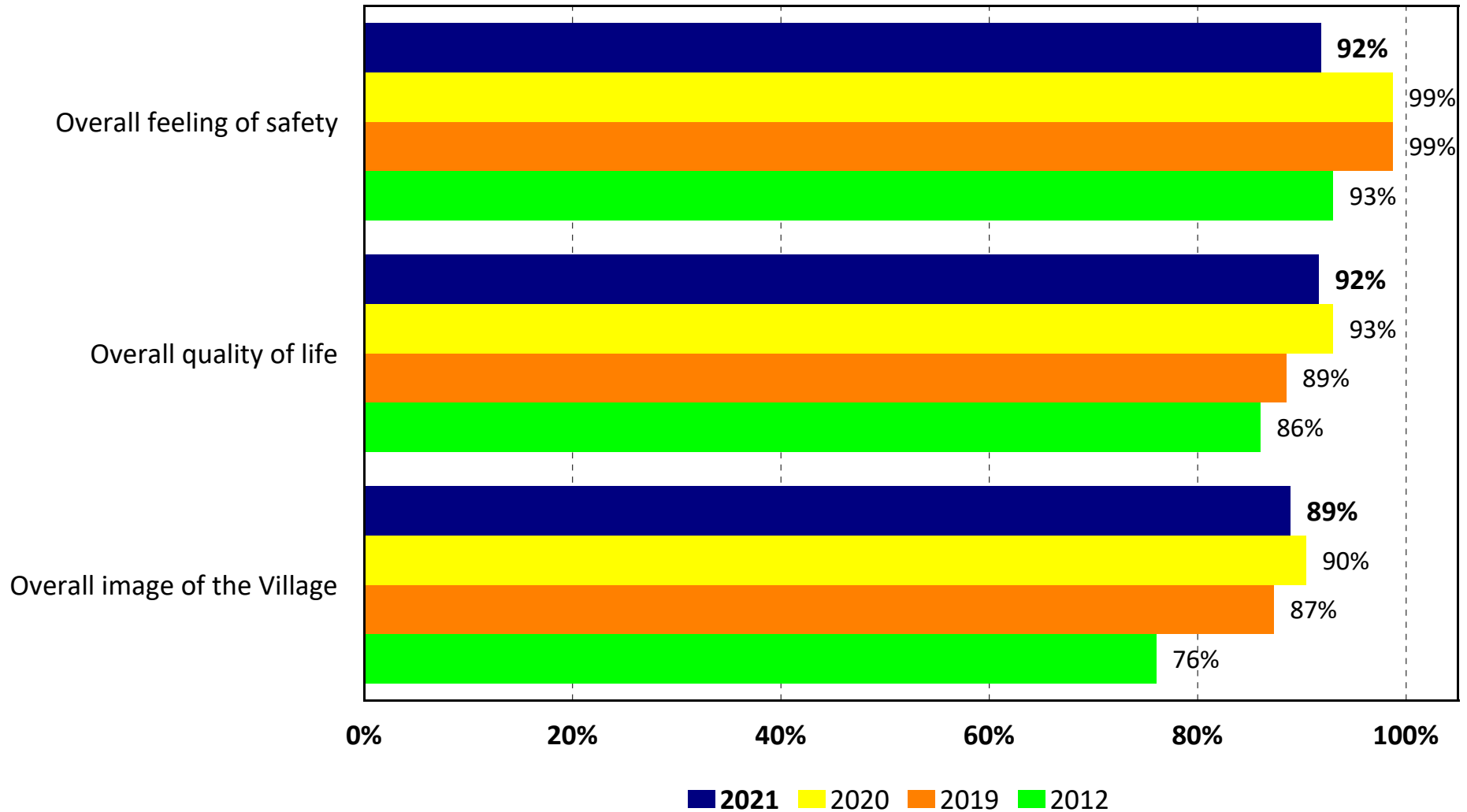
Q5. Overall Satisfaction with Various Perceptions of the Village of Pinehurst

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")



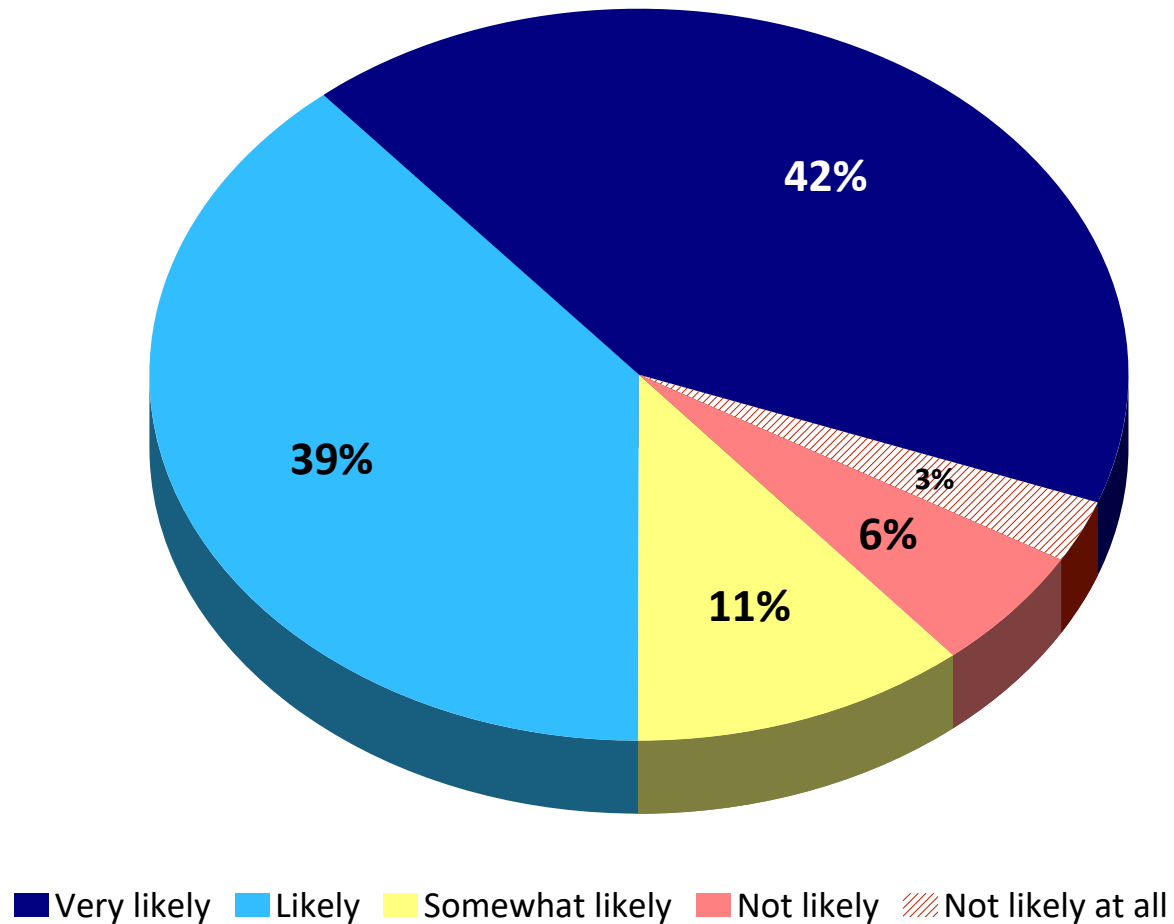
Q5. Overall Satisfaction with Various Perceptions of the Village of Pinehurst - 2012 to 2021

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")



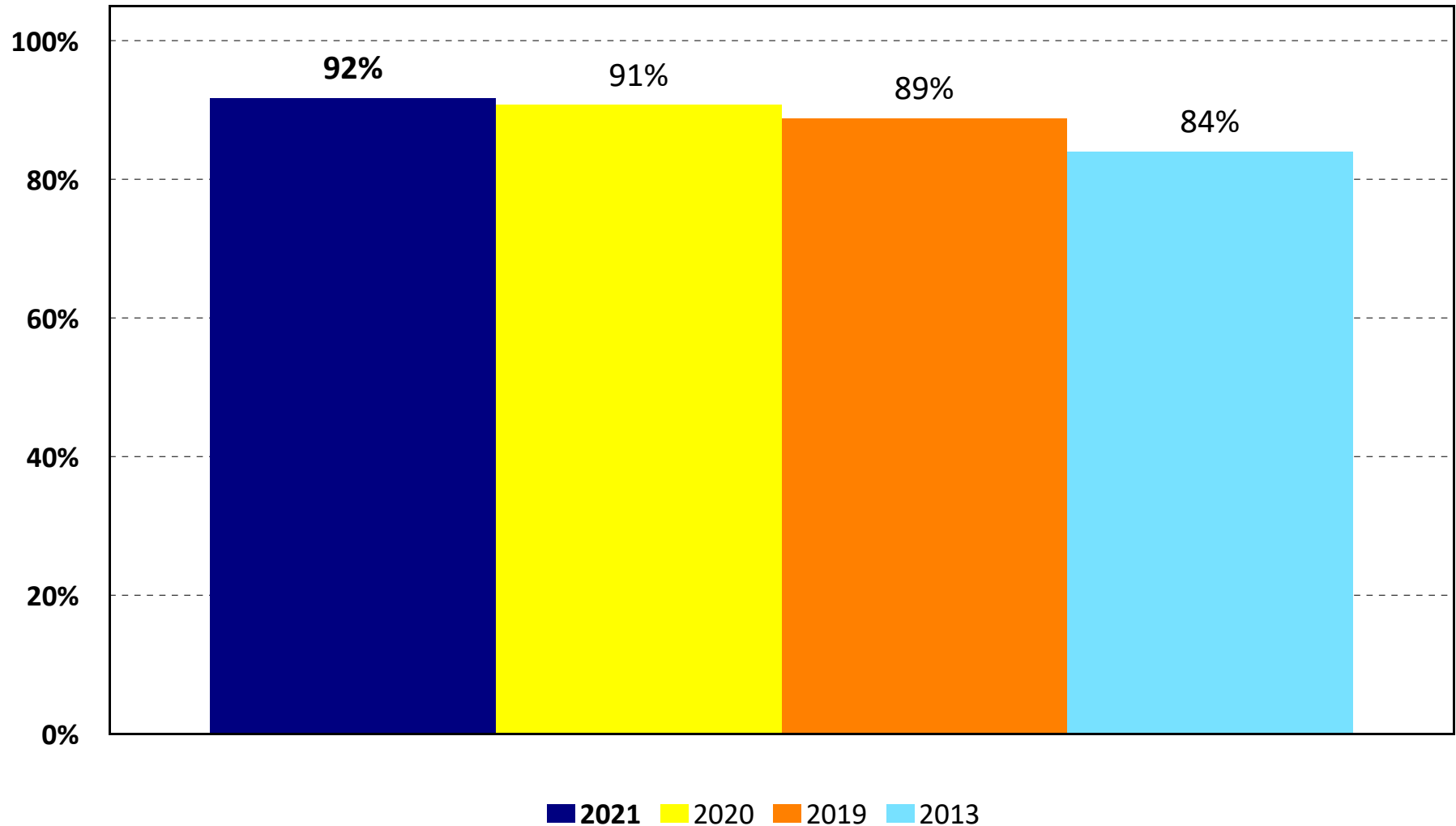
Q6. How likely would you be to recommend the Village as a business location to friends, family, and co-workers?

by percentage of respondents



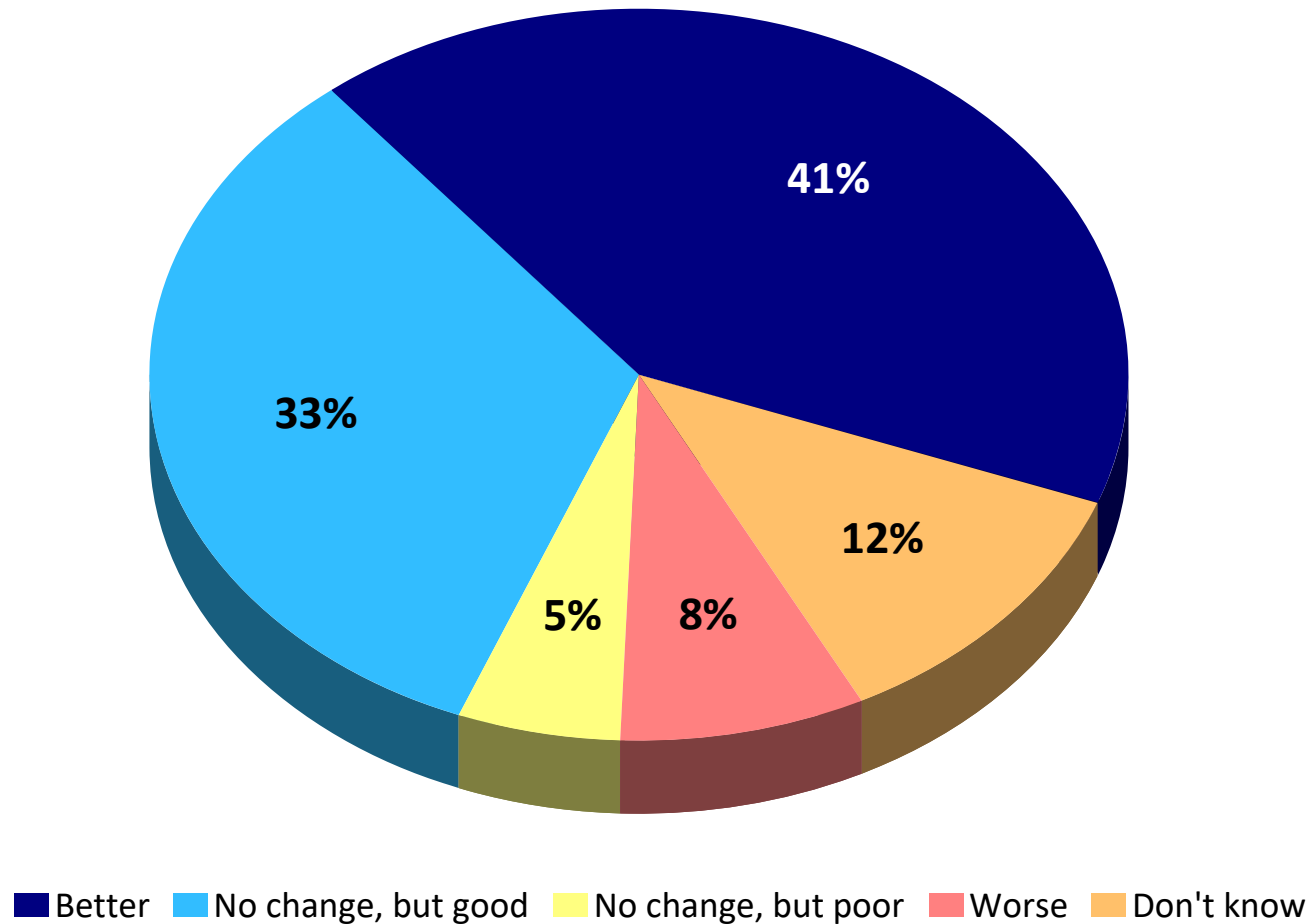
Q6. How likely would you be to recommend the Village as a business location to friends, family, and co-workers? - 2013 to 2021

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



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

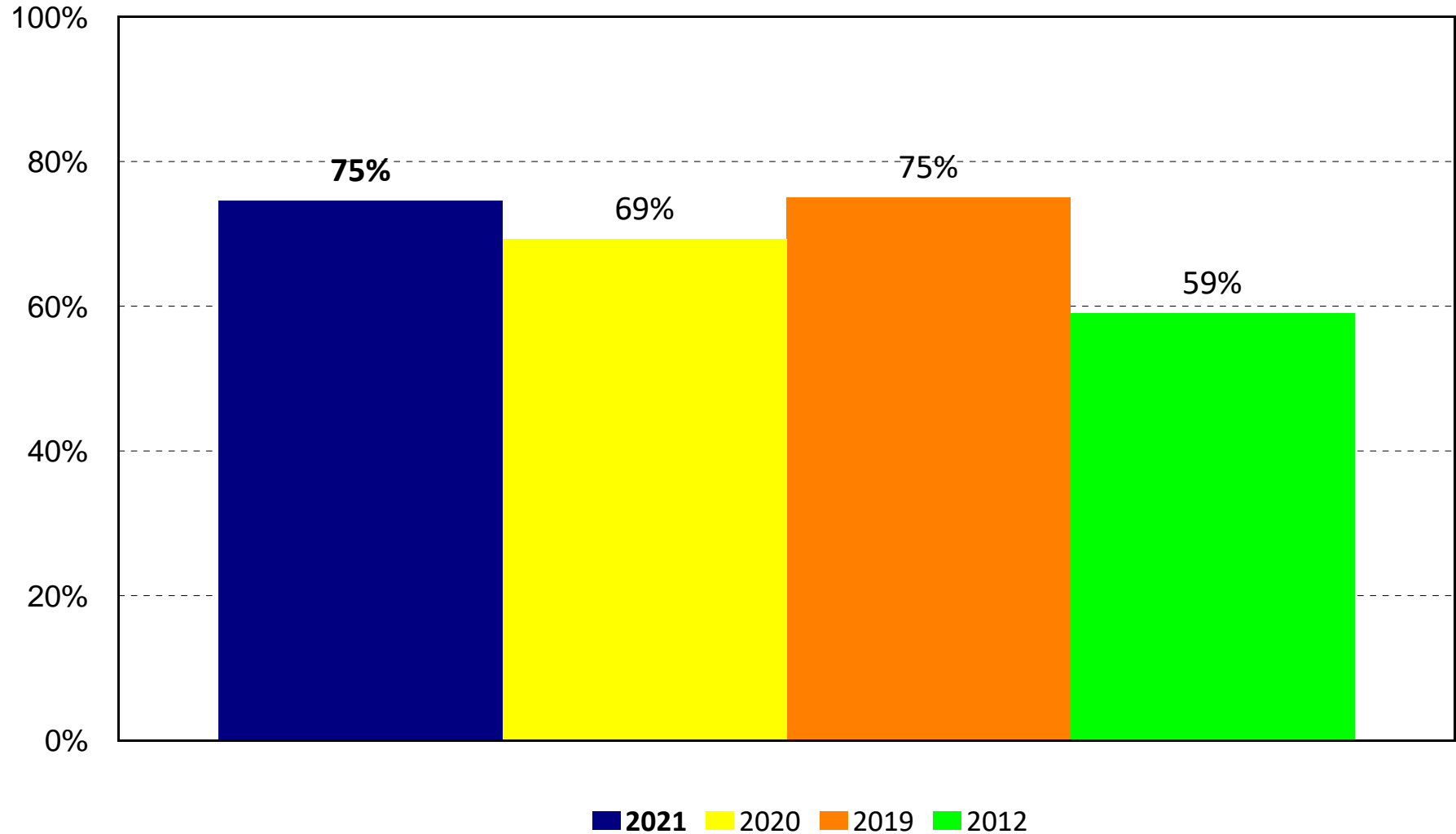
by percentage of respondents



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

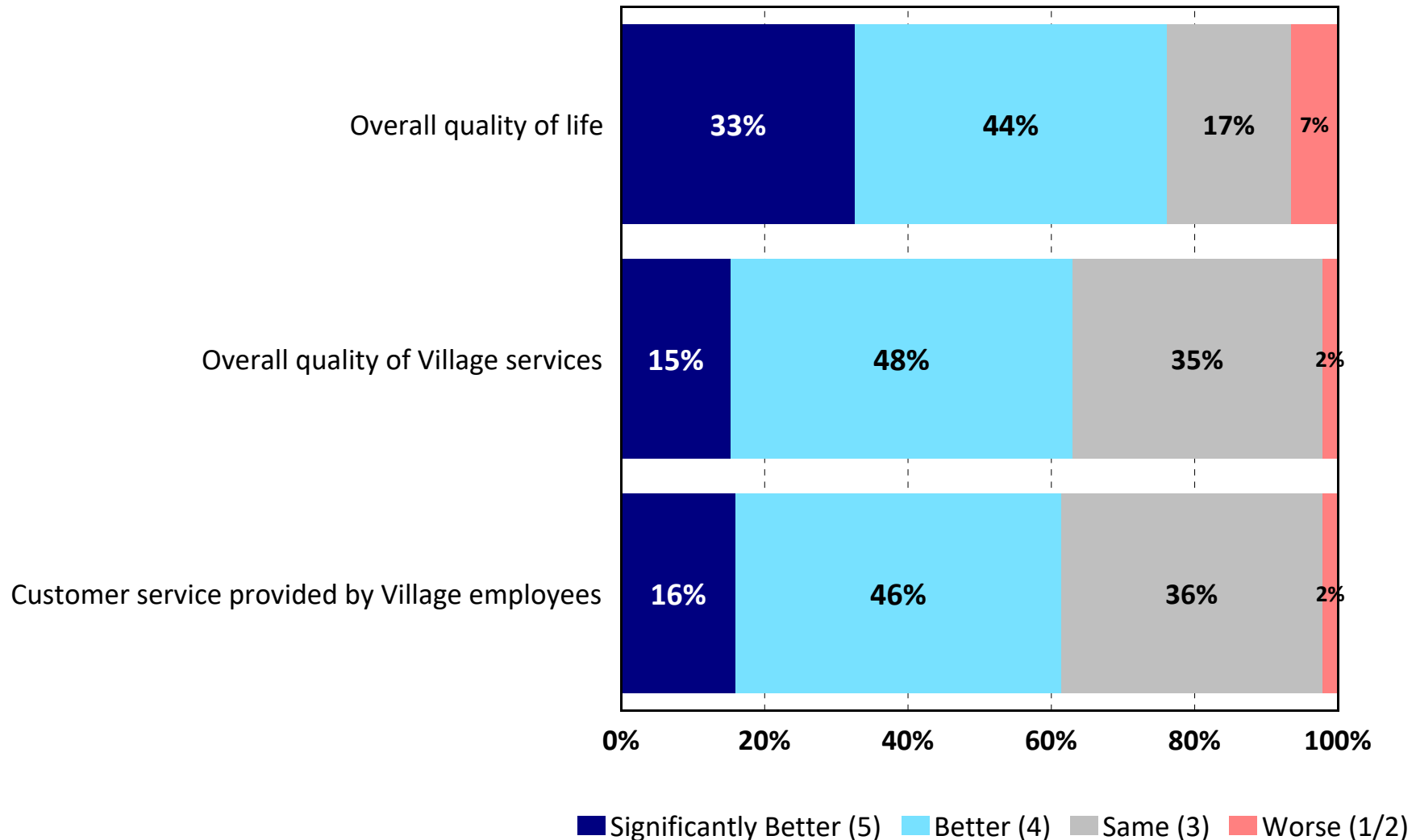
2012 to 2021

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



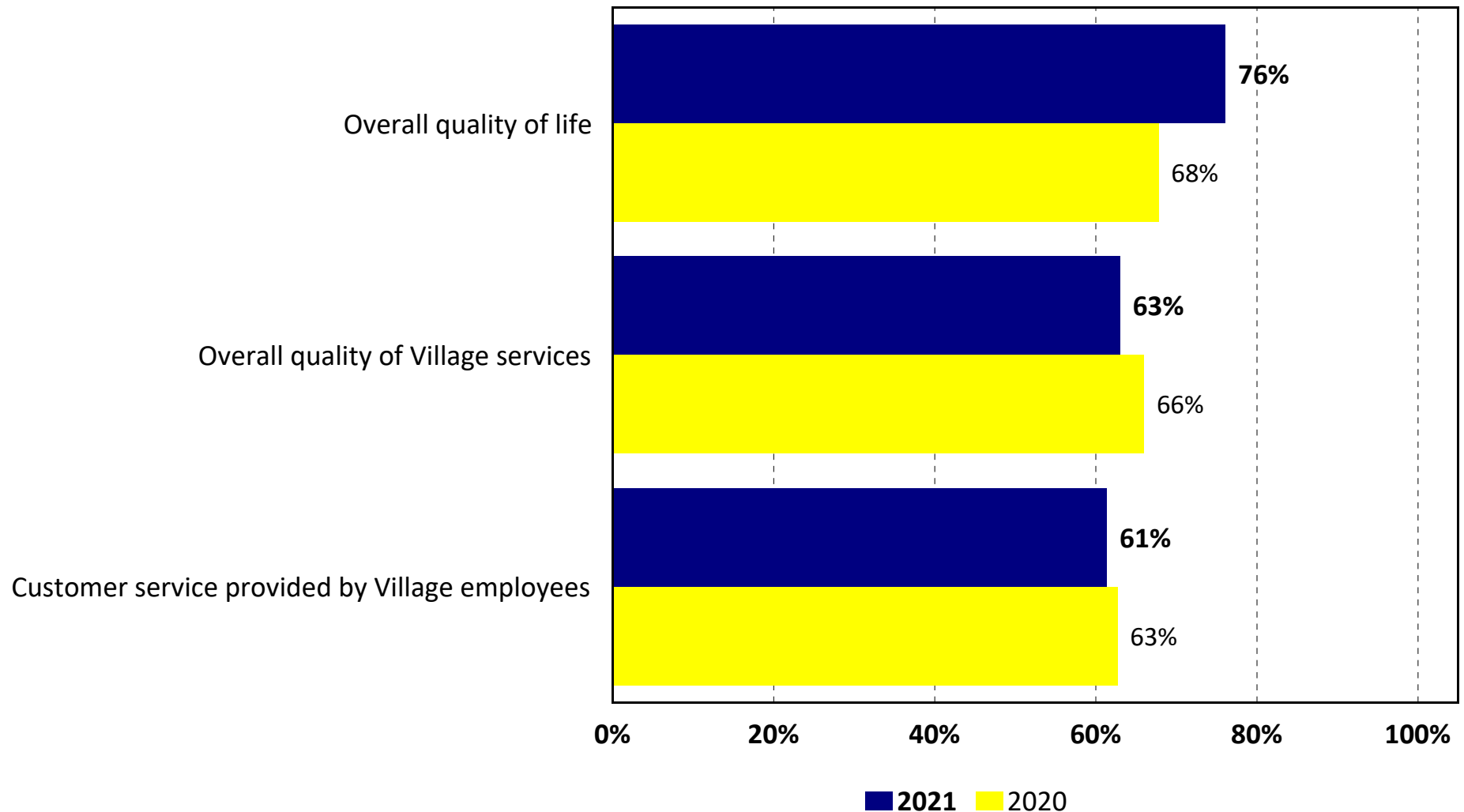
Q8. Satisfaction with various aspects of Pinehurst compared to other places businesses have operated in the past

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”)



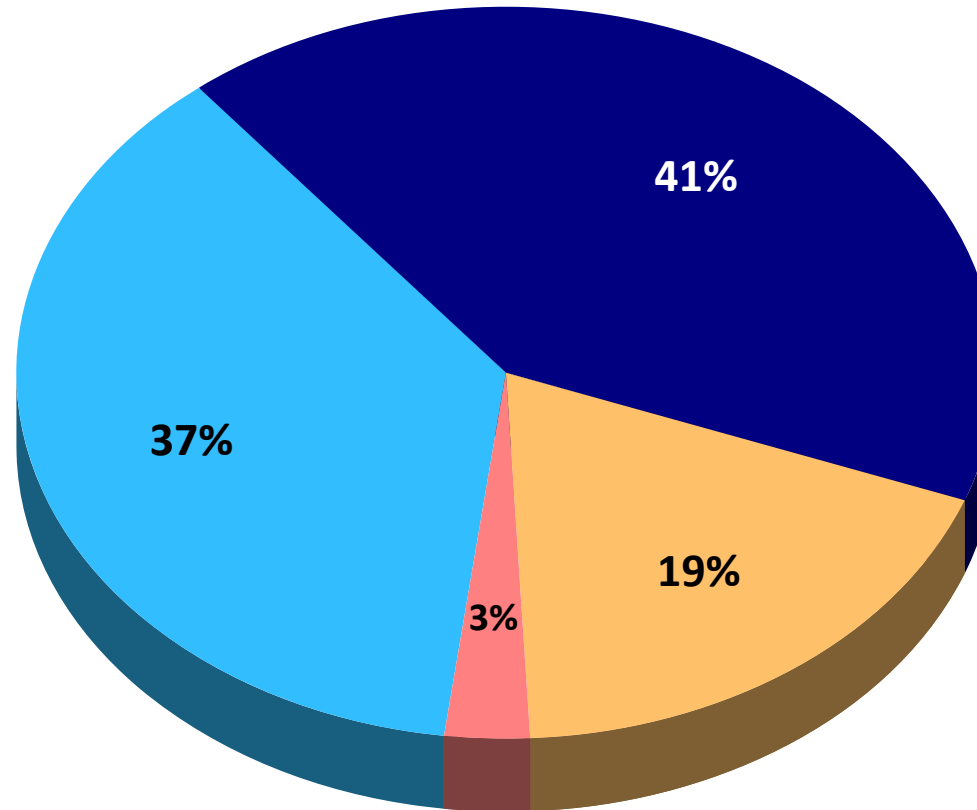
Q8. Satisfaction with various aspects of Pinehurst compared to other places businesses have operated in the past 2020 vs. 2021

by percentage of respondents who answered “significantly better” or “better”



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

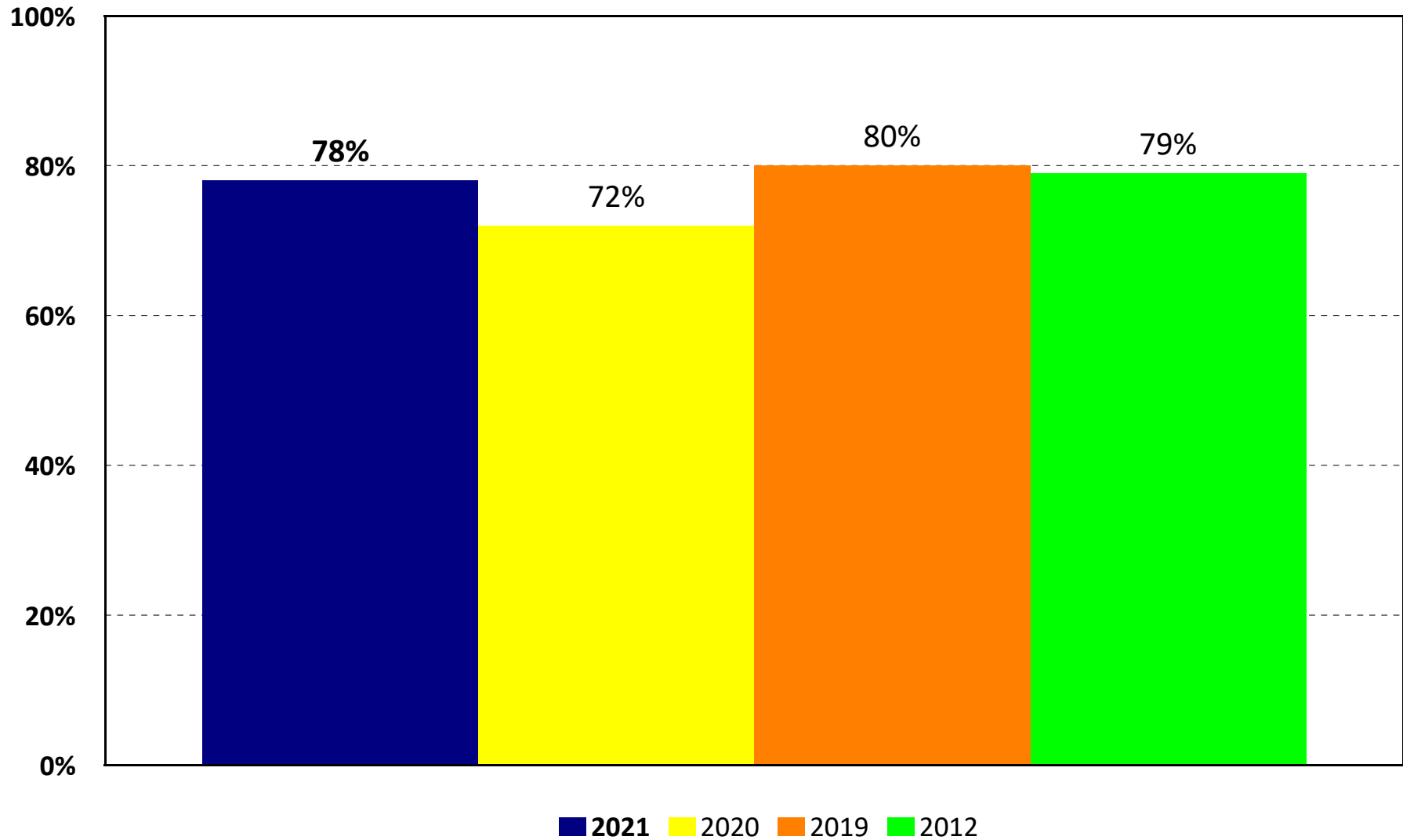
by percentage of respondents



Very good Good Poor Don't know

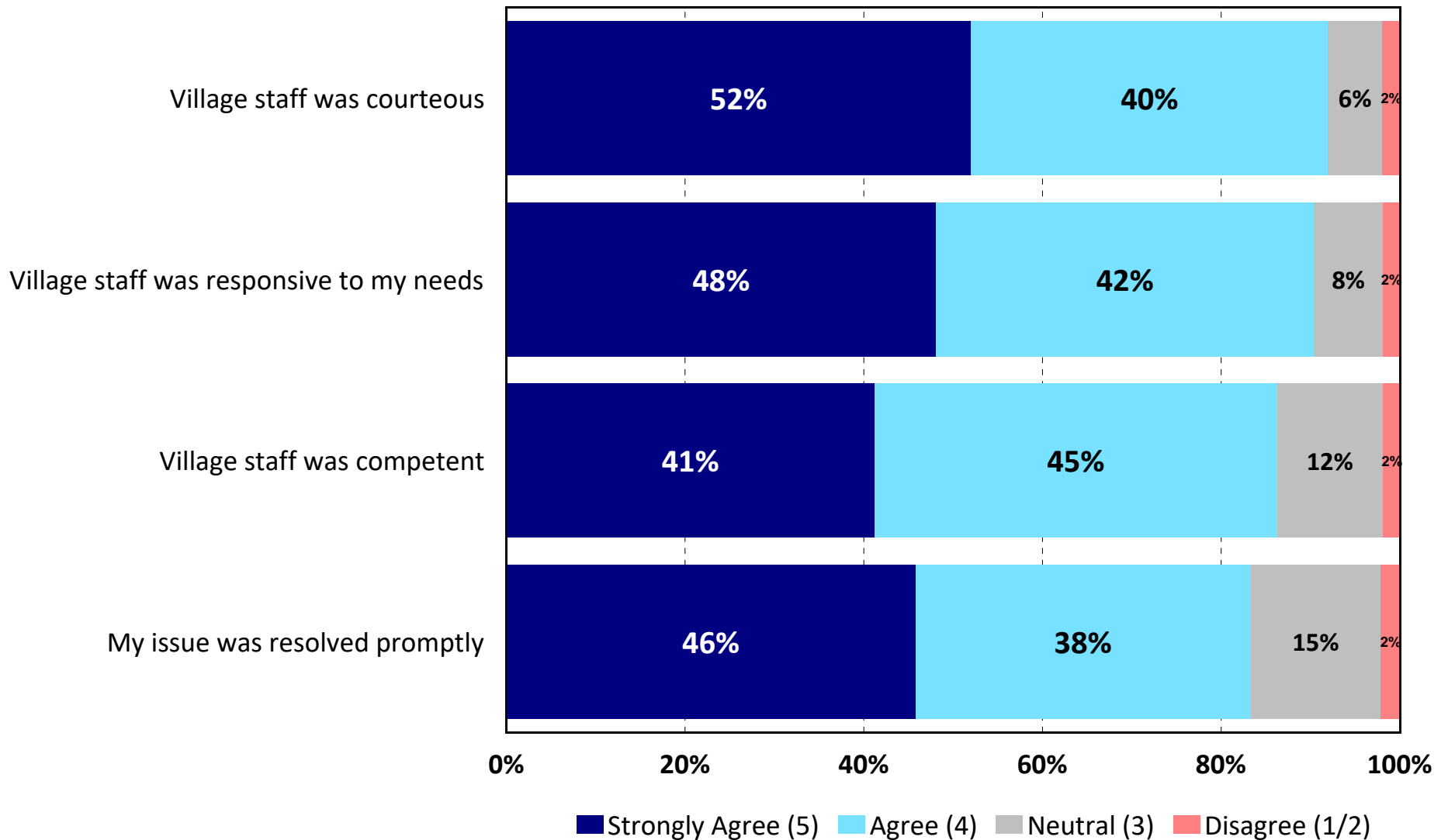
Q9. How would you rate the Village of Pinehurst customer service? - 2012 to 2021

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



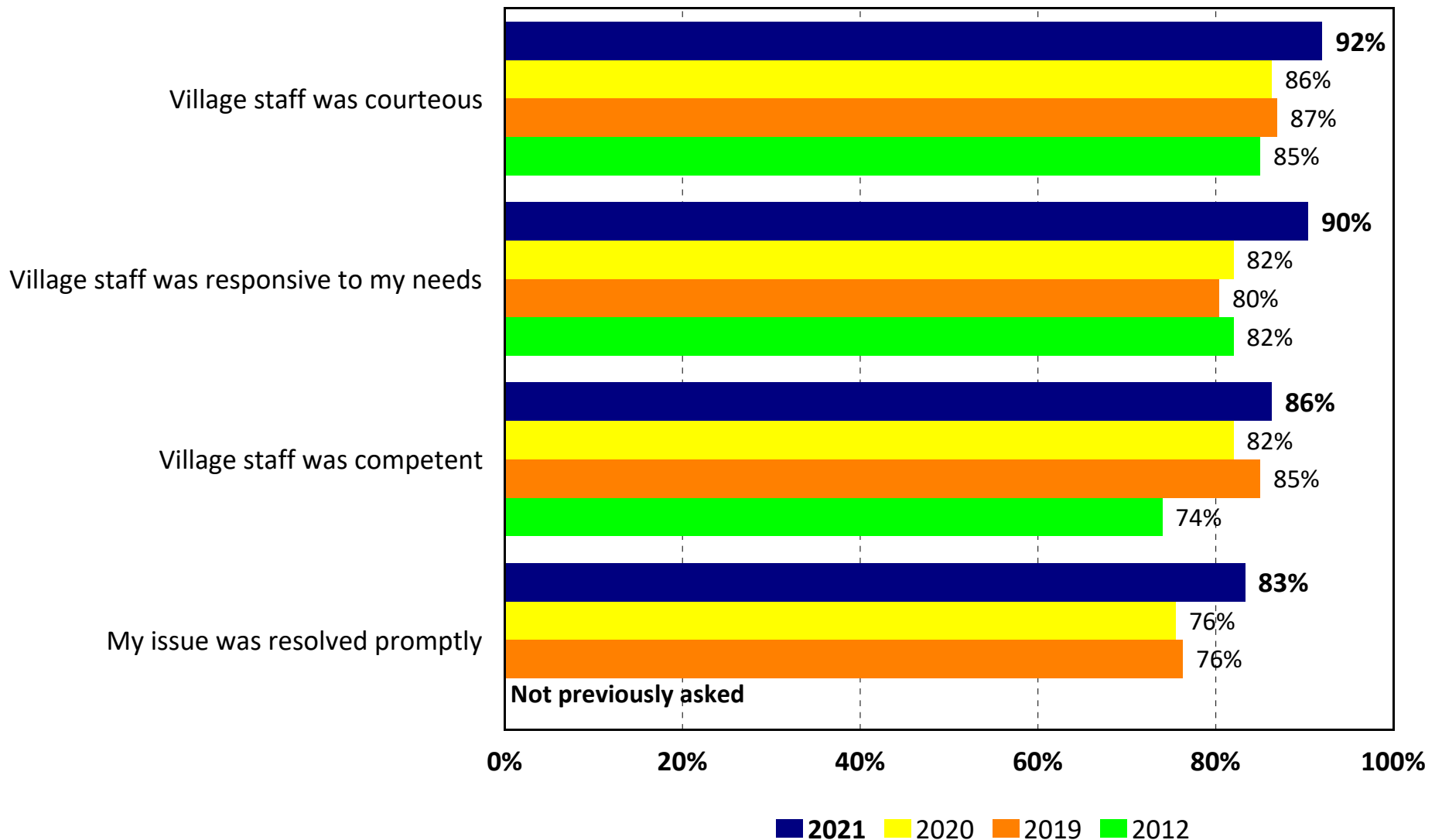
Q10. Level of Agreement with Statements About Most Recent Contact with the Village Government Staff

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



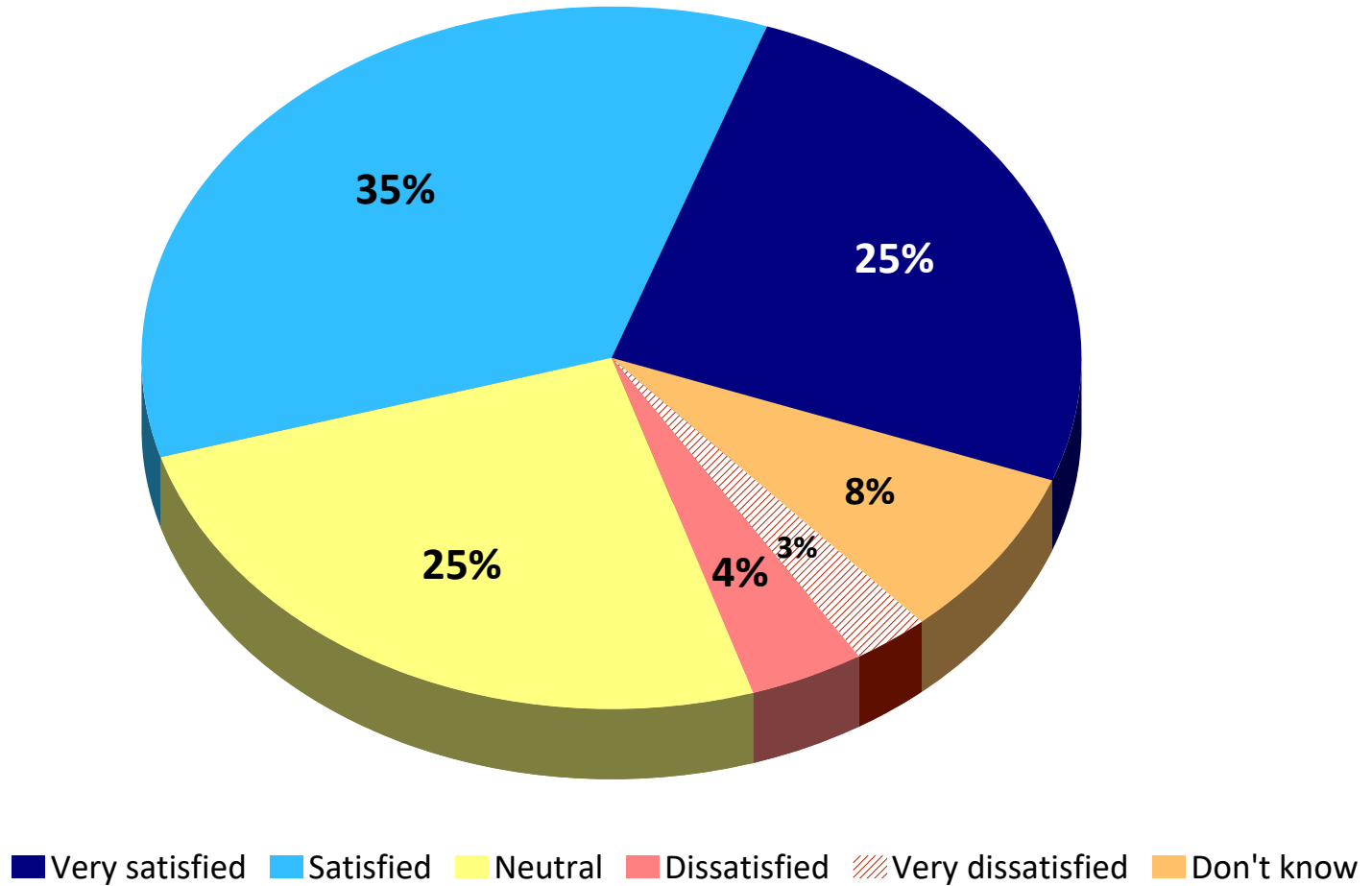
Q10. Level of Agreement with Statements About Most Recent Contact with the Village - 2012 to 2020

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



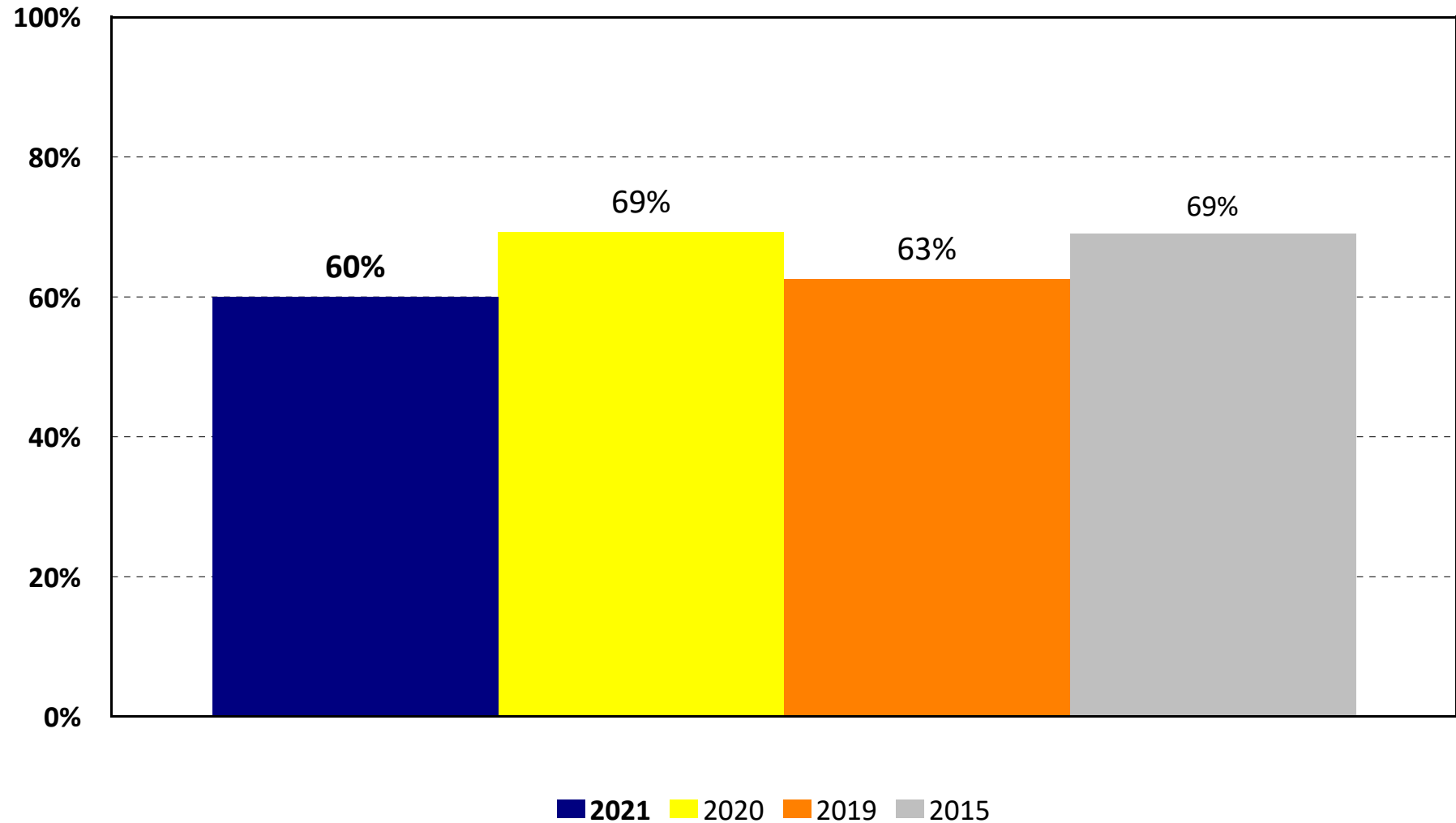
Q11. How satisfied are you with the job the Village of Pinehurst does communicating with business owners?

by percentage of respondents



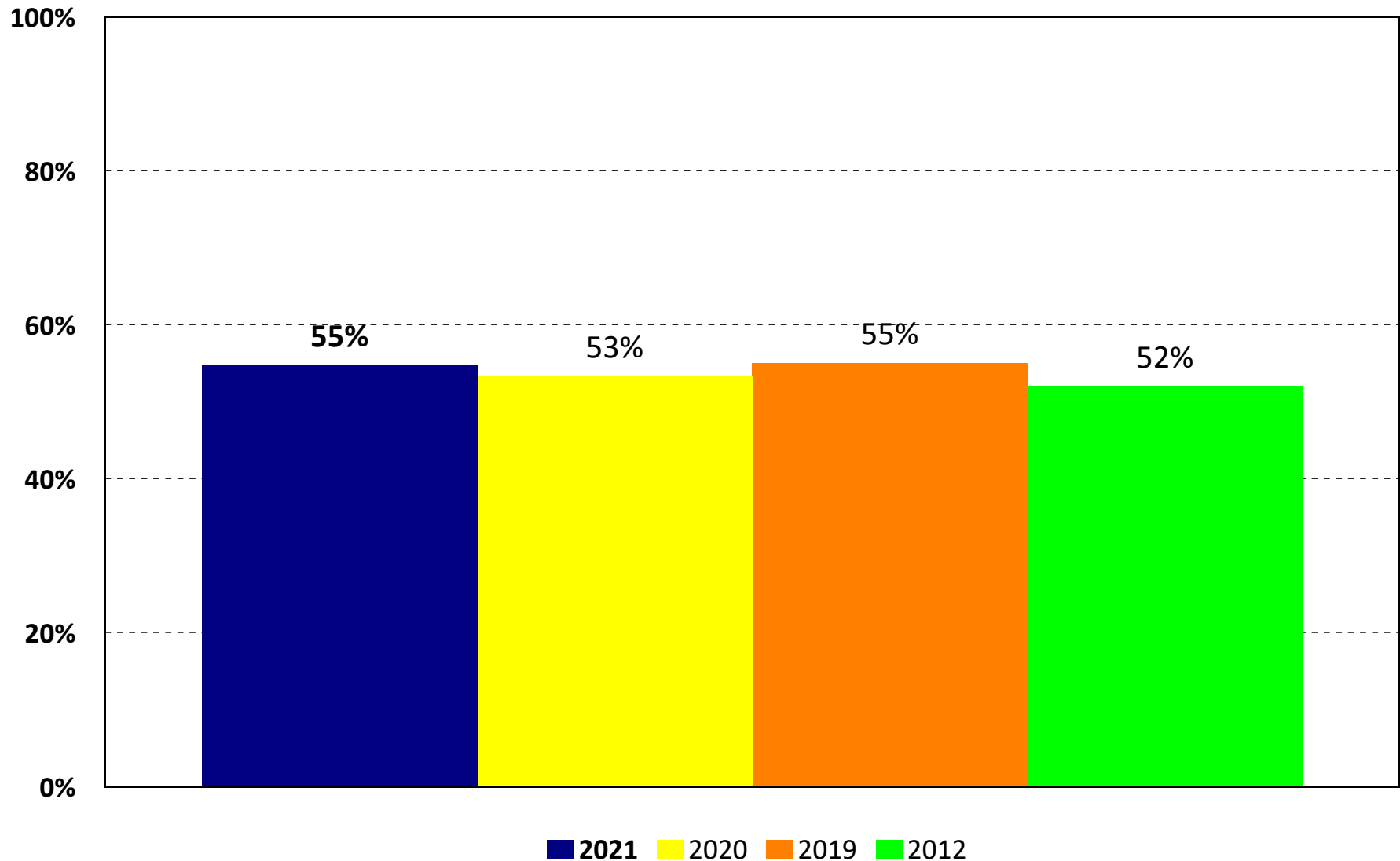
Q11. How satisfied are you with the job the Village of Pinehurst does communicating with business owners? 2015 to 2021

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



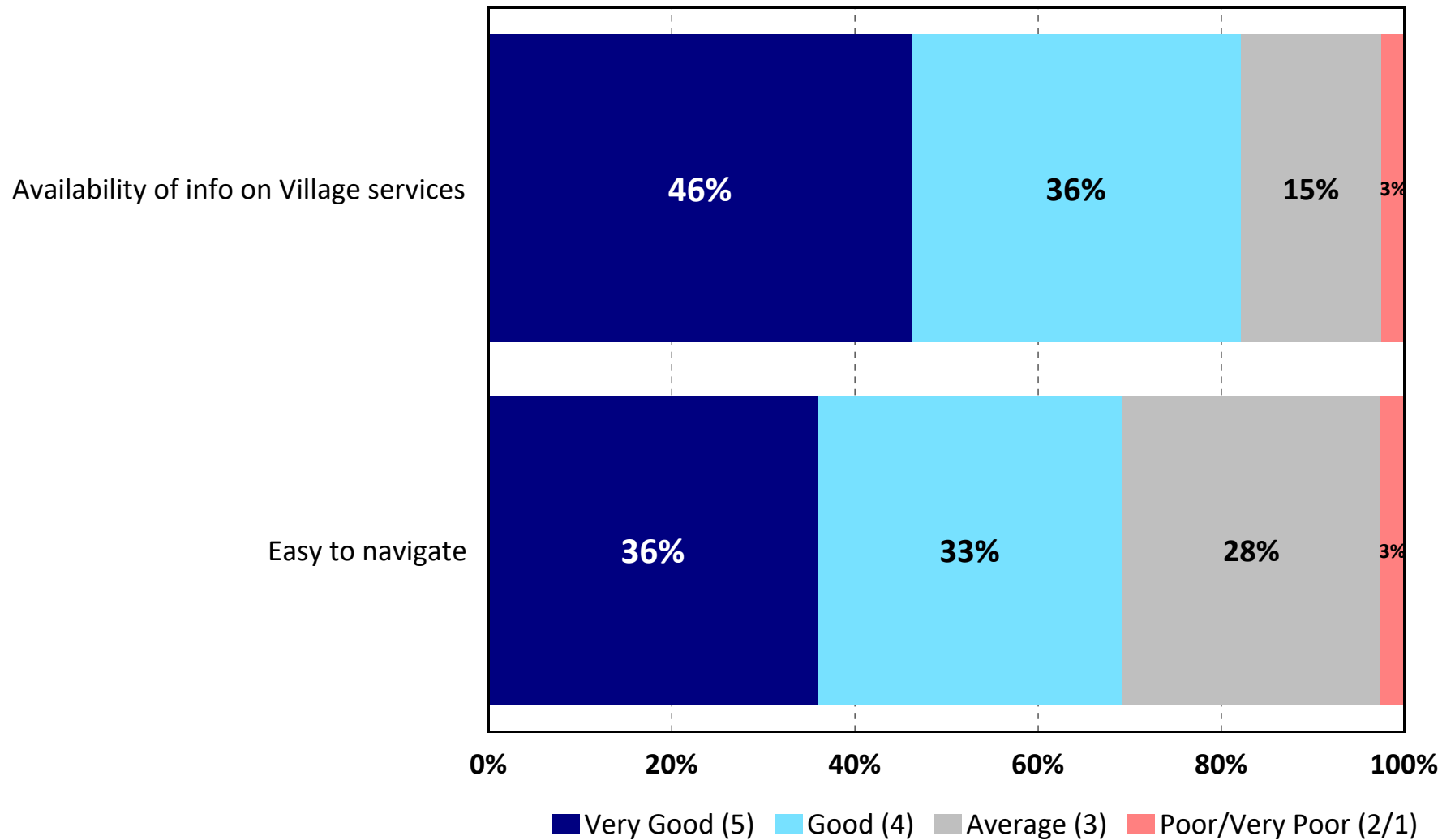
Q12. Have you visited the Village's website (www.vopnc.org) during the last 12 months? - 2012 to 2021

by percentage of respondents who answered "yes"



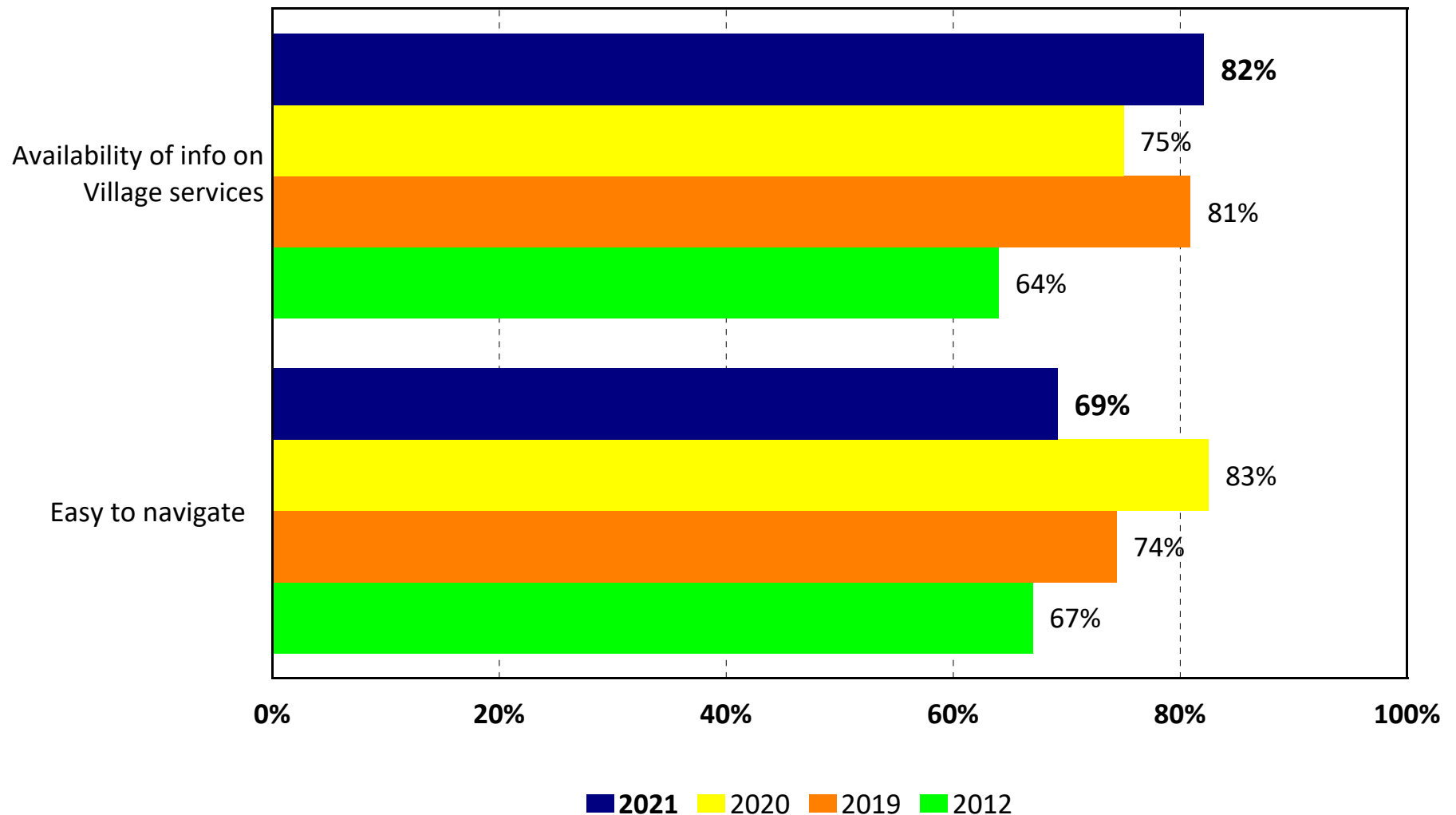
Q12a. How would you rate the following characteristics of the Village website?

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



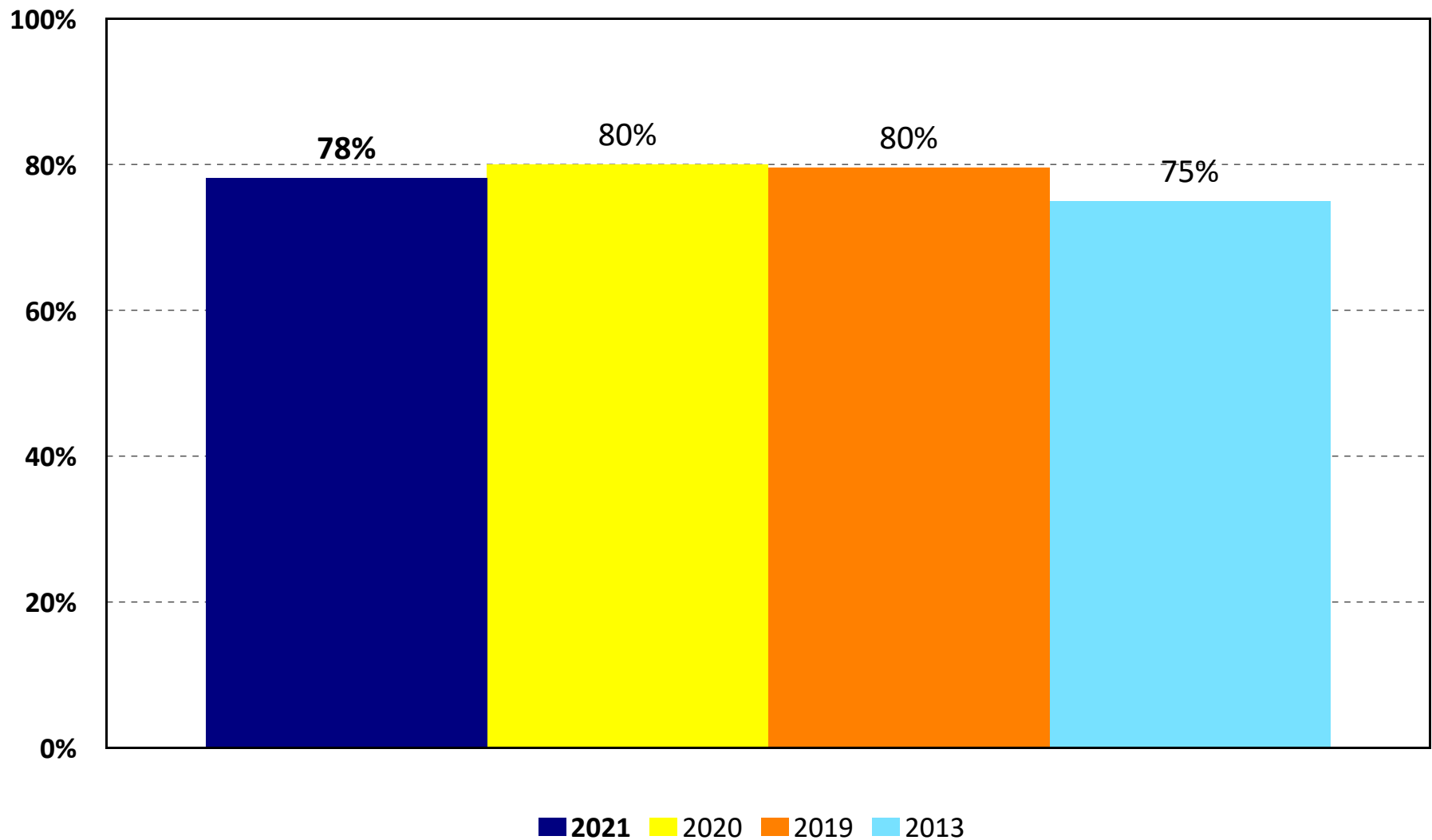
Q12a. How would you rate the following characteristics of the Village website? - 2012 to 2021

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



Q12b. How satisfied are you with the Village's website? 2013 to 2021

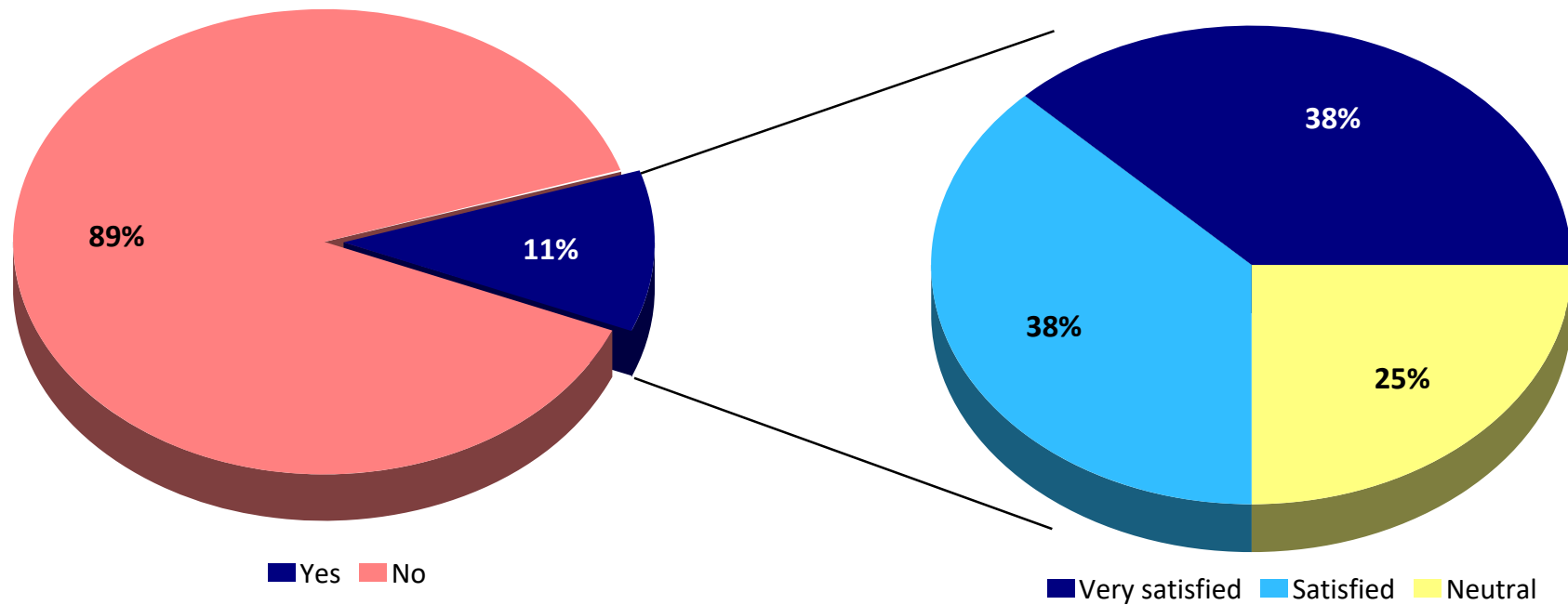
by percentage of respondents who responded "very satisfied" or "satisfied"



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

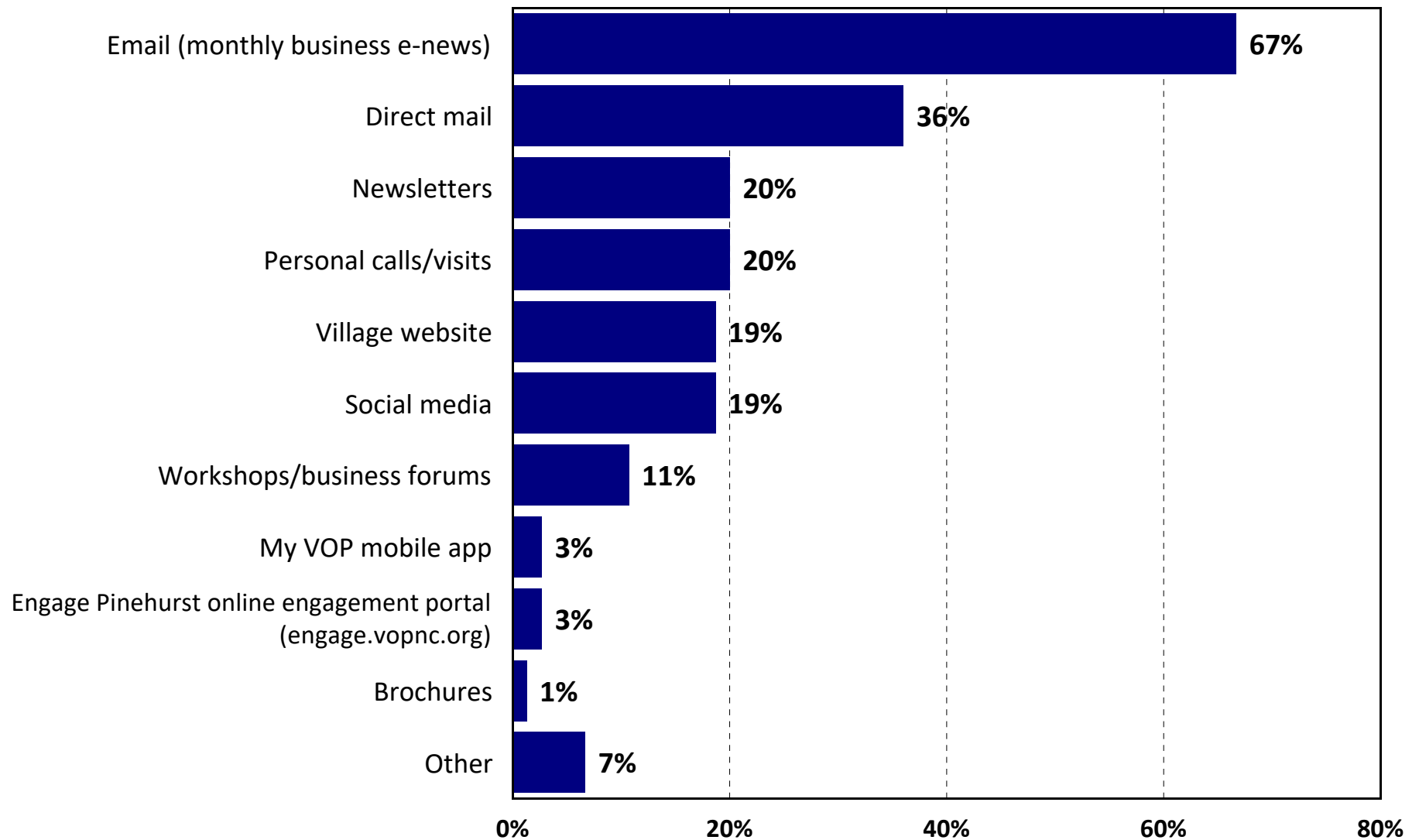
by percentage of respondents (excluding "don't know")

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



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

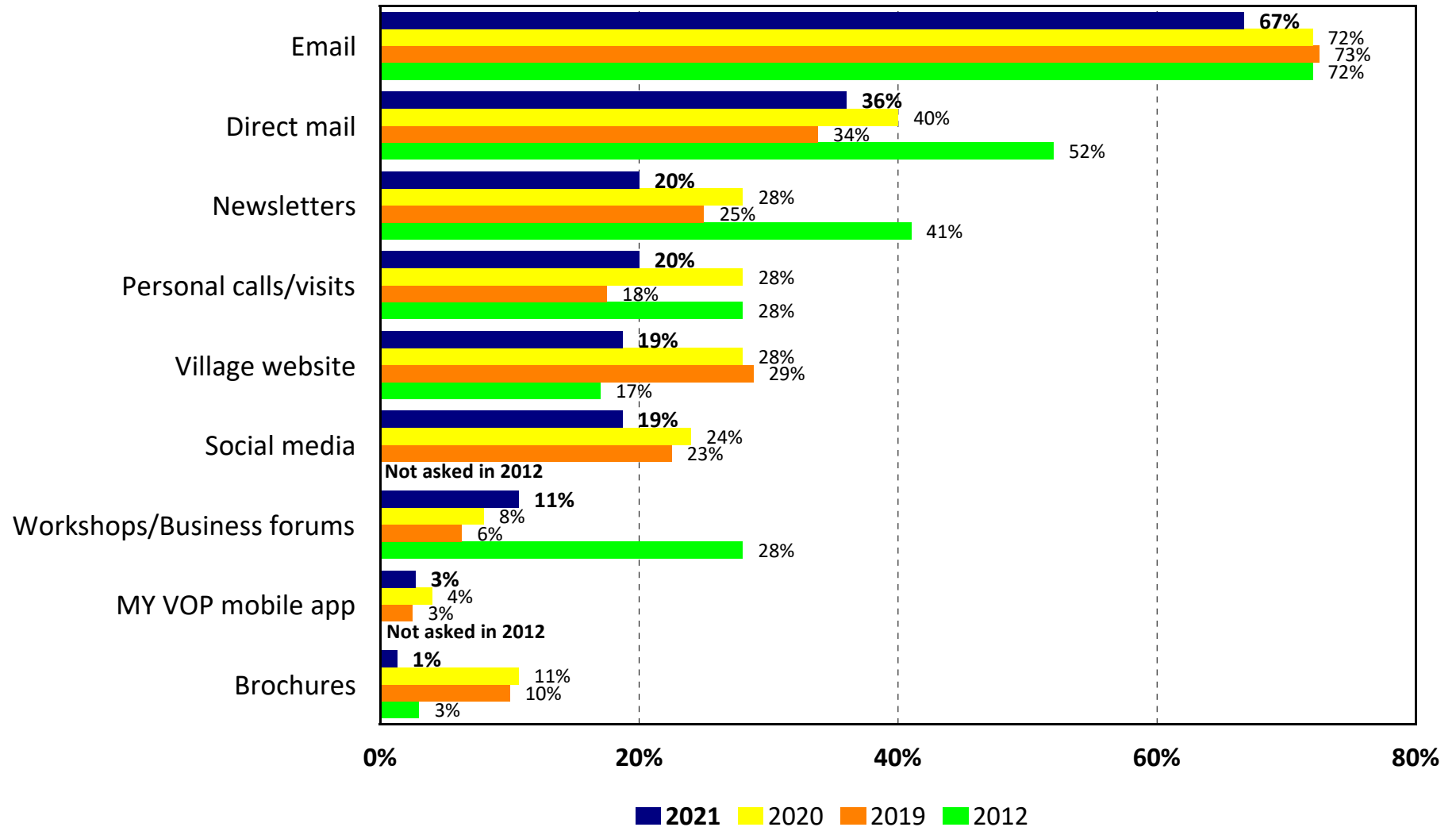
by percentage of respondents (multiple choices could be made)



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

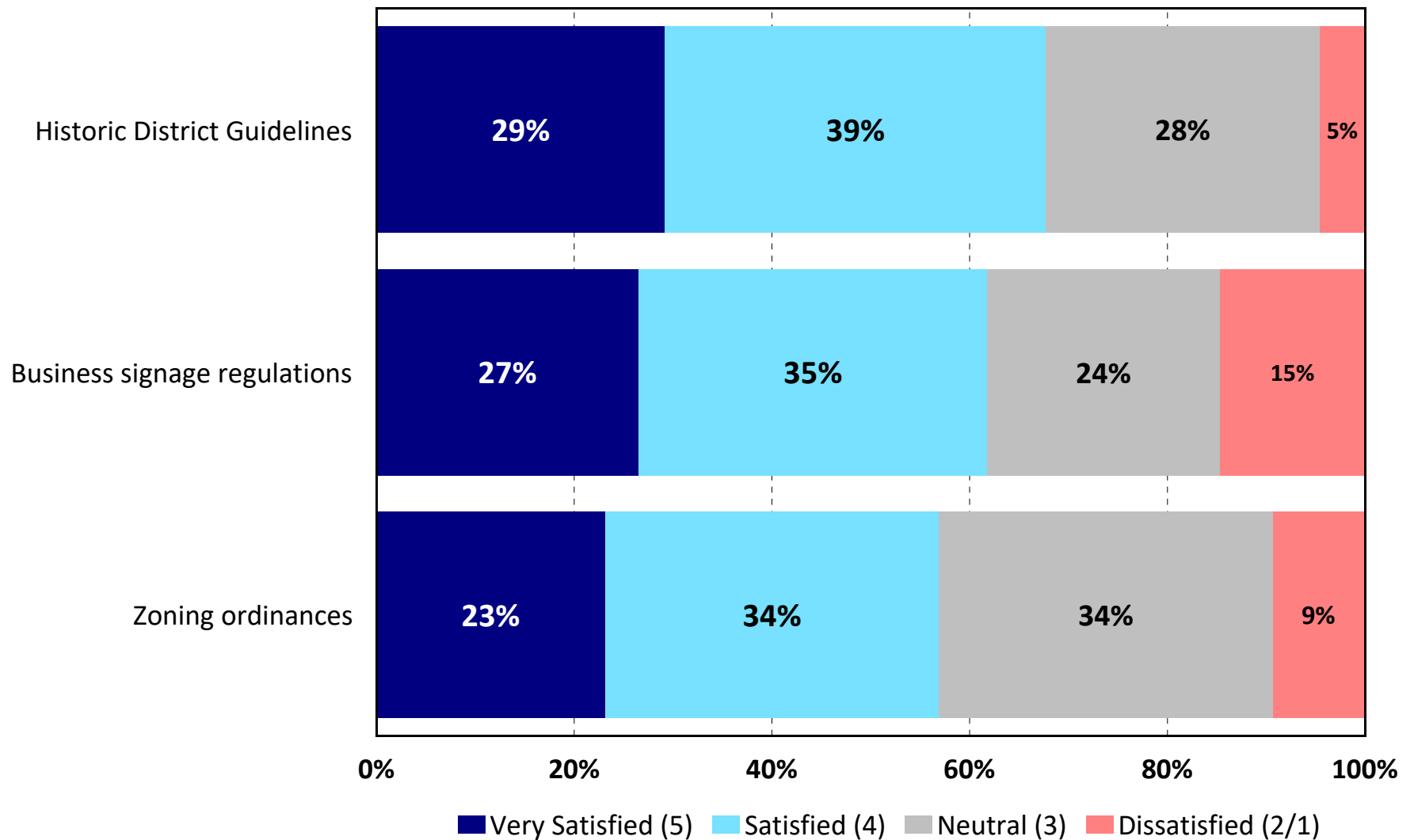
2012 to 2021

by percentage of respondents (multiple choices could be made)



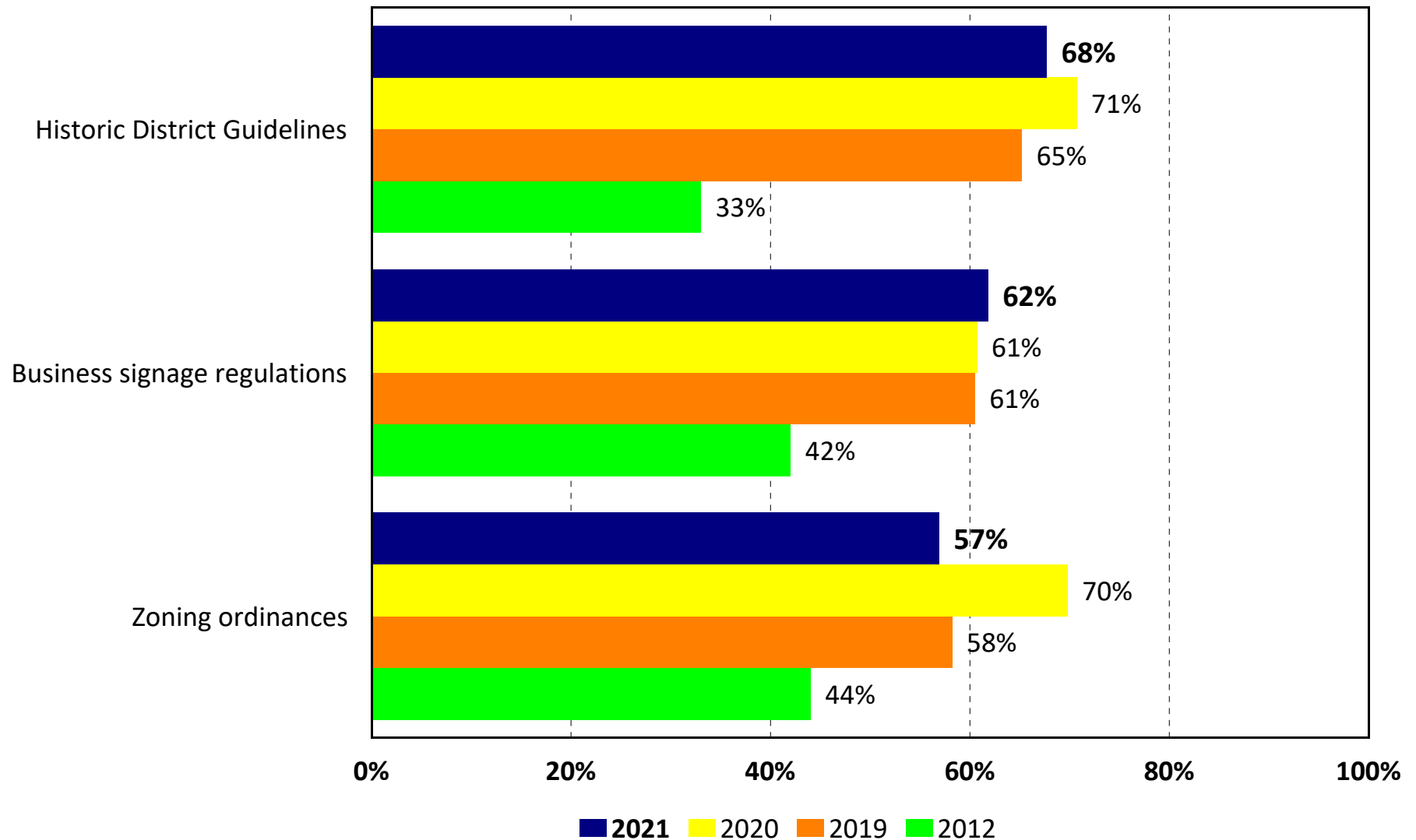
Q15. Level of Satisfaction with Community Development (Village Codes and Ordinances)

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”)



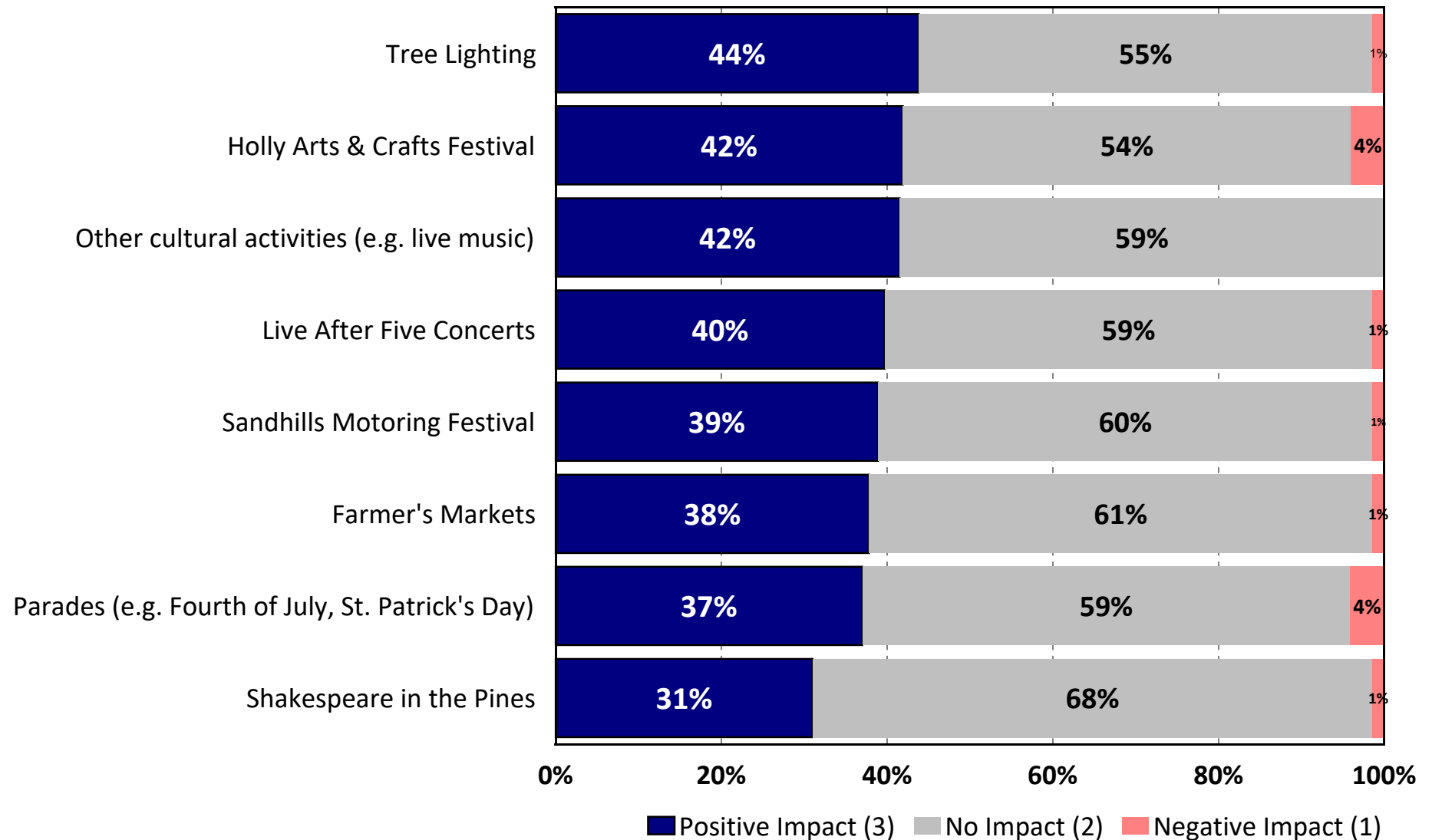
Q15. Level of Satisfaction with Community Development (Village Codes and Ordinances) - 2012 to 2021

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



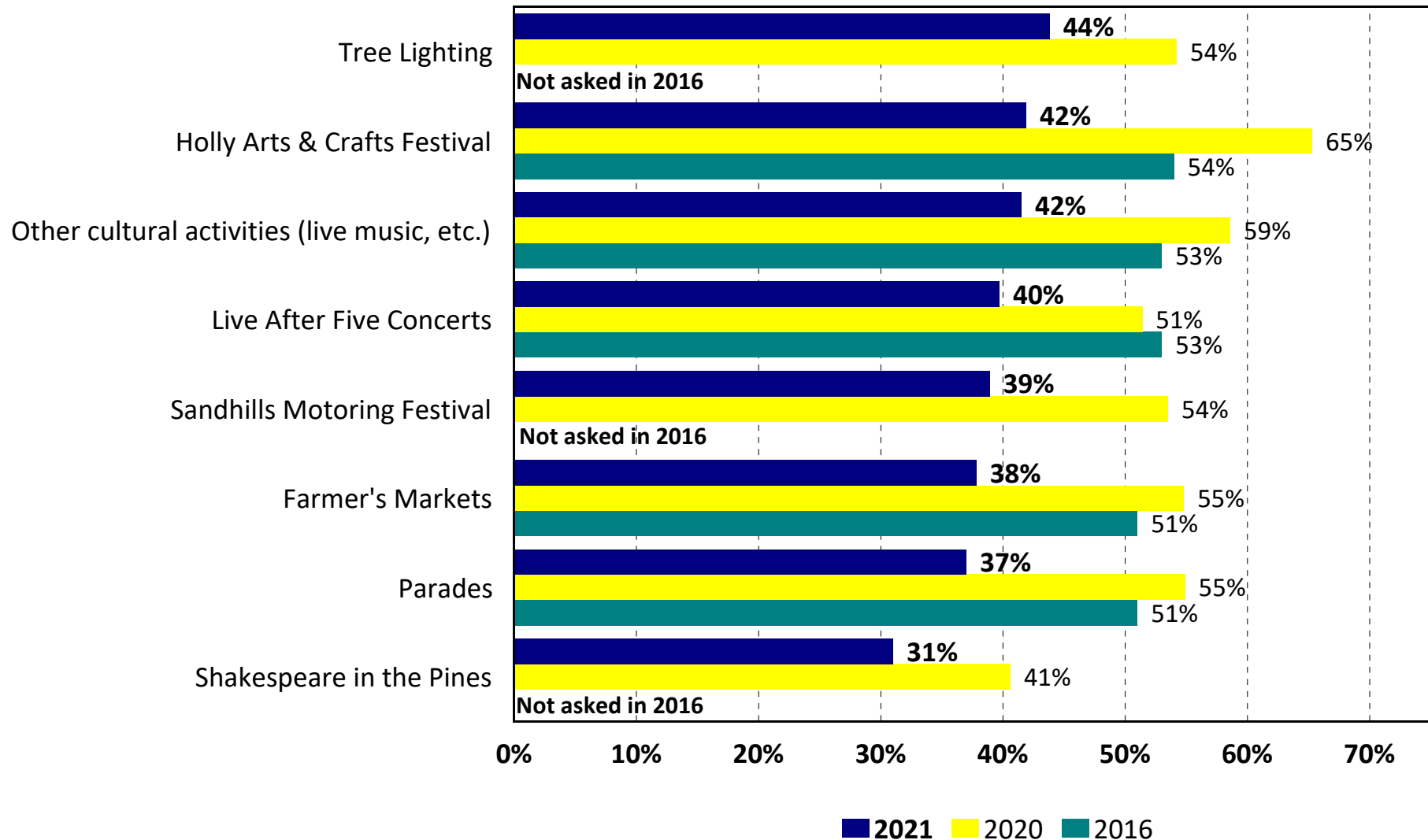
Q16. How Businesses Feel About the Impact the Following Events in the Village Center Have on Their Business

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



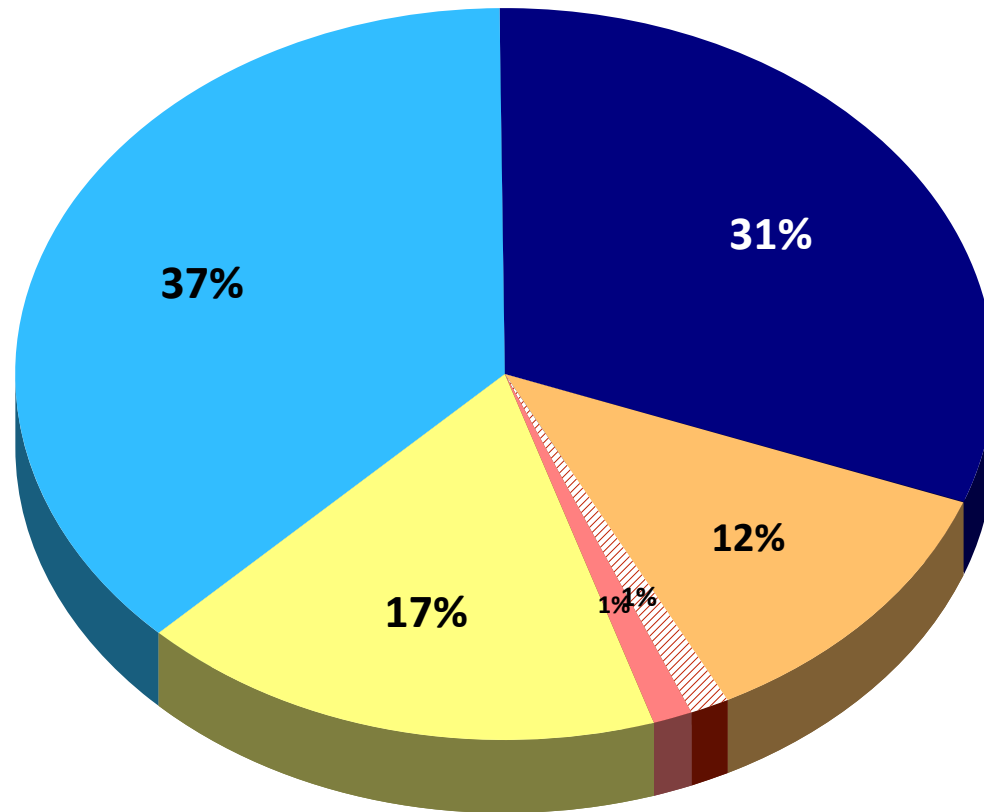
Q16. How Businesses Feel About the Impact the Following Events in the Village Center Have on Their Business 2016 to 2021

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



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

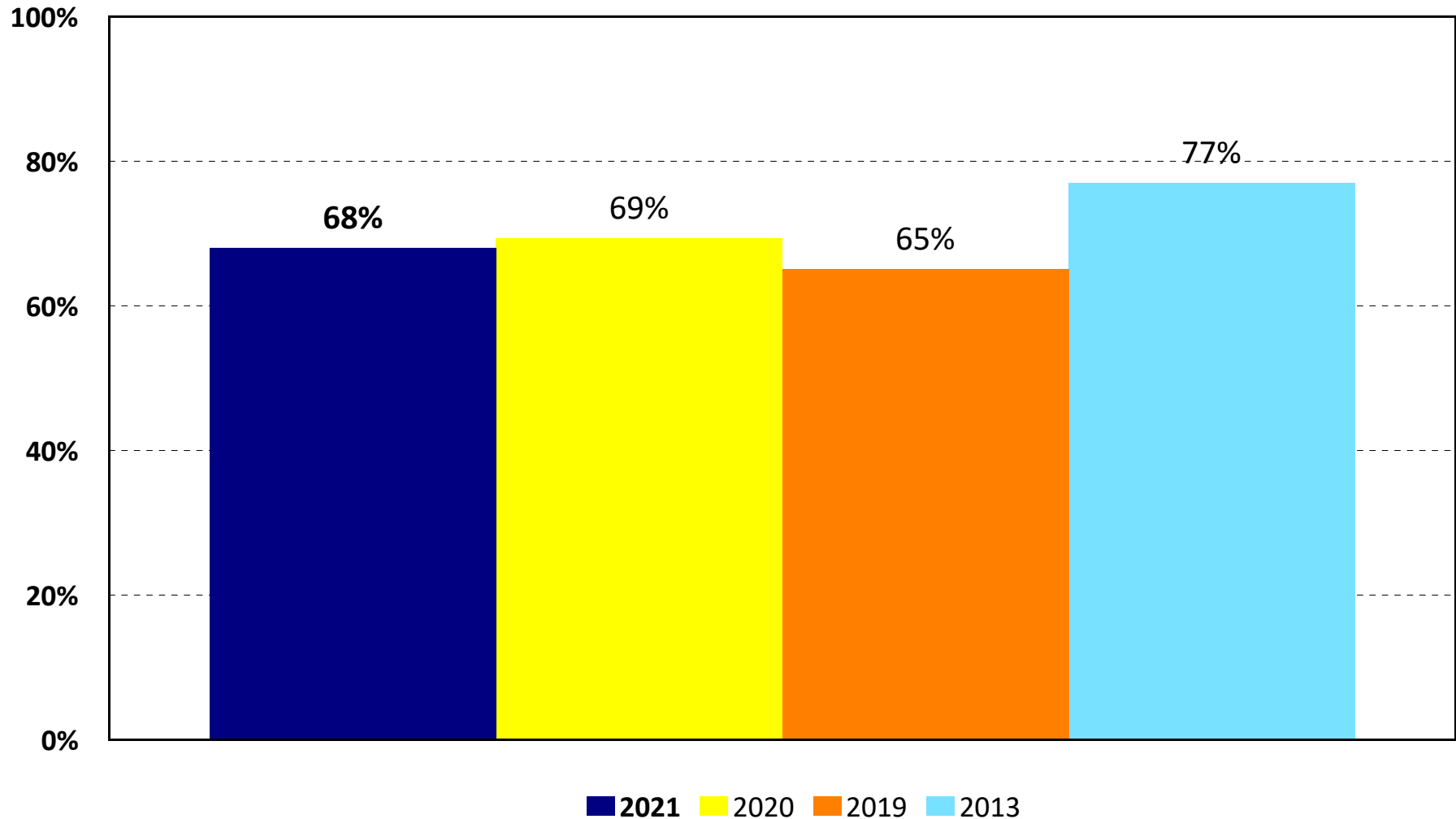
by percentage of respondents



■ Very satisfied ■ Satisfied ■ Neutral ■ Dissatisfied ■ Very dissatisfied ■ Don't know

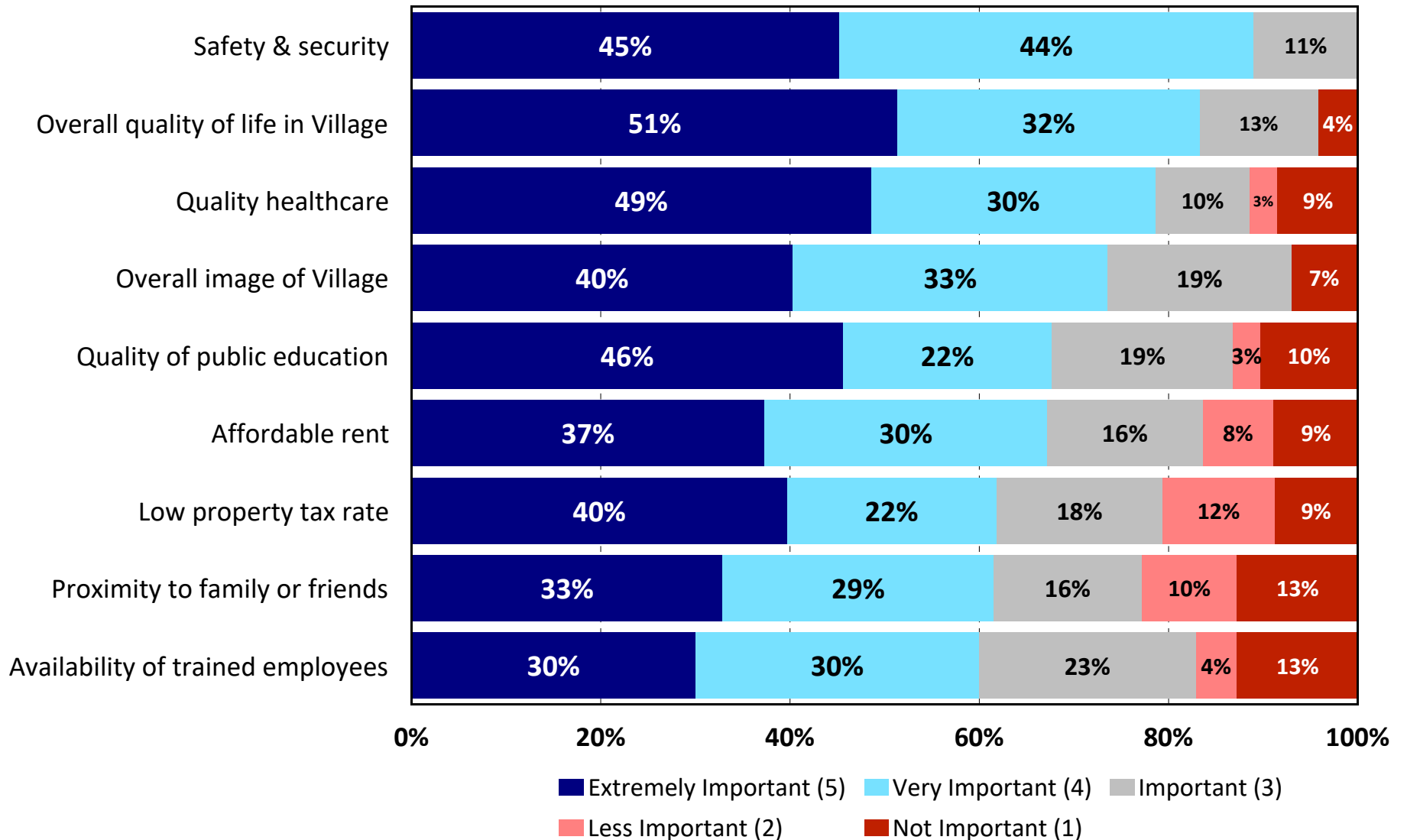
Q17. How satisfied are you with the way the Village handles events that attract large crowds to the Village? 2013 to 2021

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



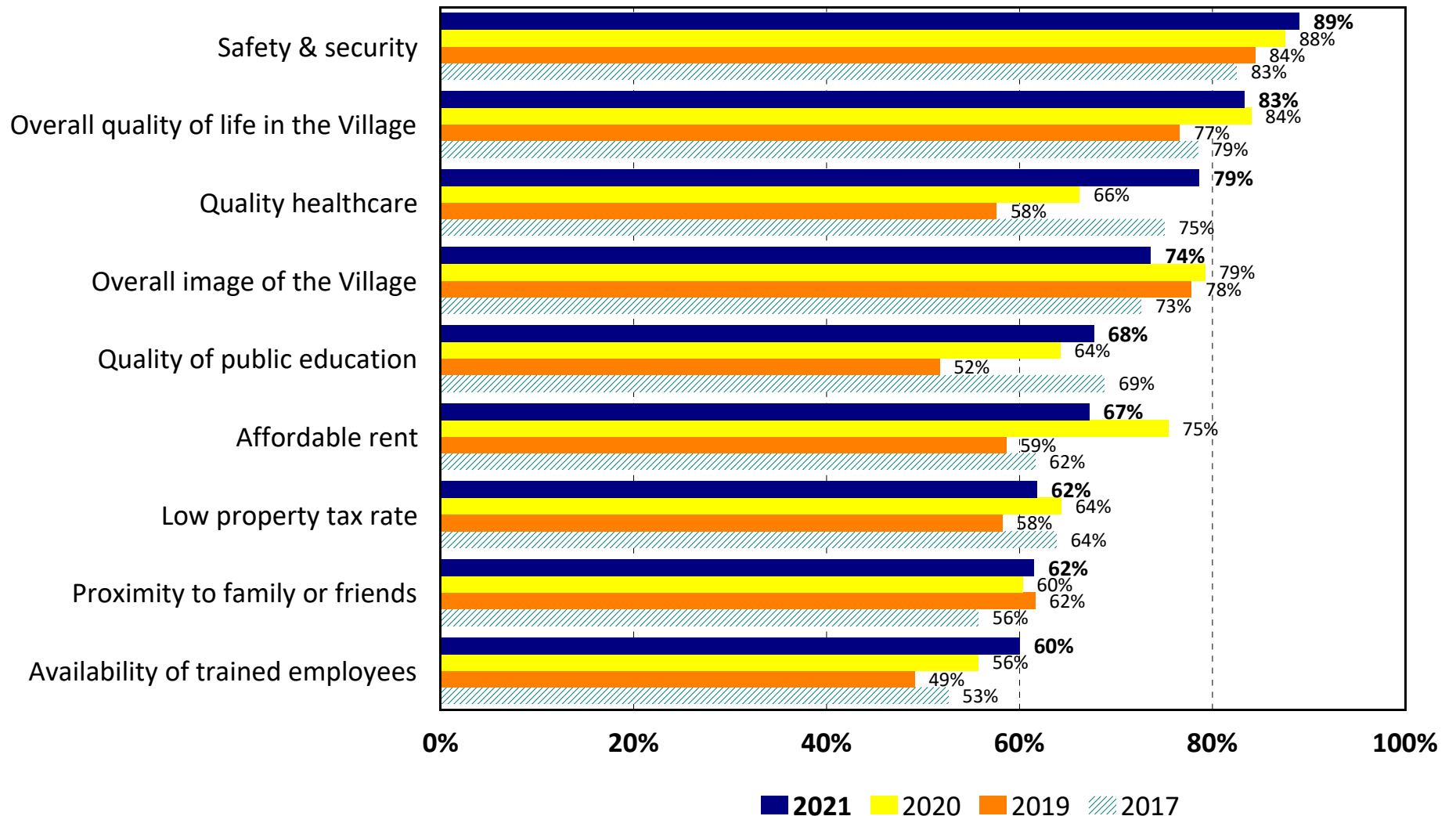
Q18. Importance of Various Reasons in Your Decision to Locate Your Business in the Village of Pinehurst

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



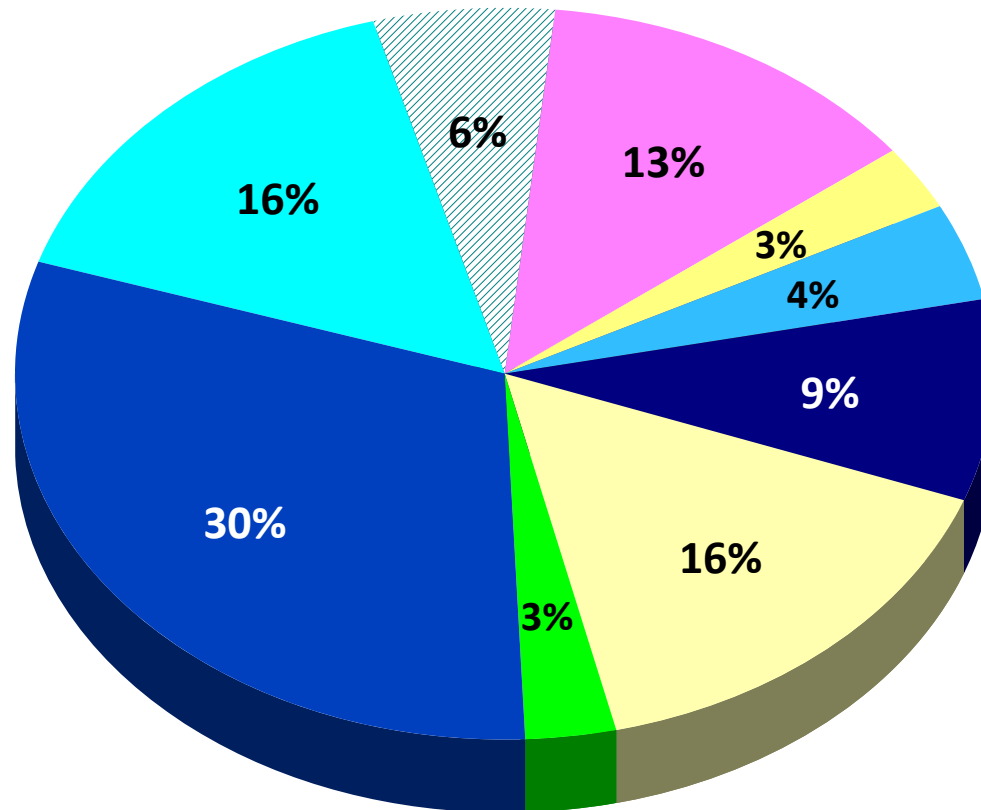
Q18. Importance of Various Reasons in Your Decision to Locate Your Business in the Village of Pinehurst 2017 to 2021

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



Q21. Primary Business Category

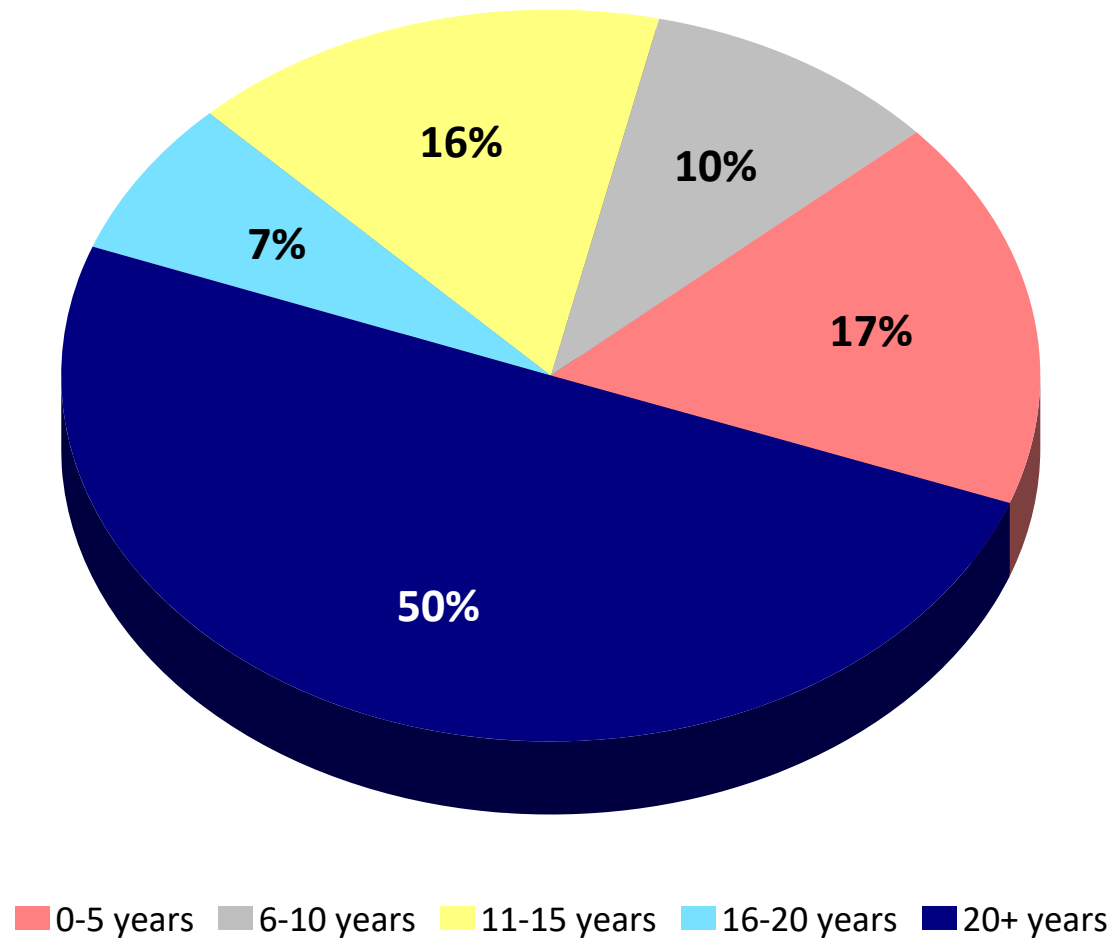
by percentage of respondents



- Retail
- Restaurants & Food Services
- Inn
- Professional, Scientific, & Technical Services
- Financial & Insurance
- Real Estate & Rental Leasing
- Health Care & Social Assistance
- Arts, Entertainment, & Recreation
- Other

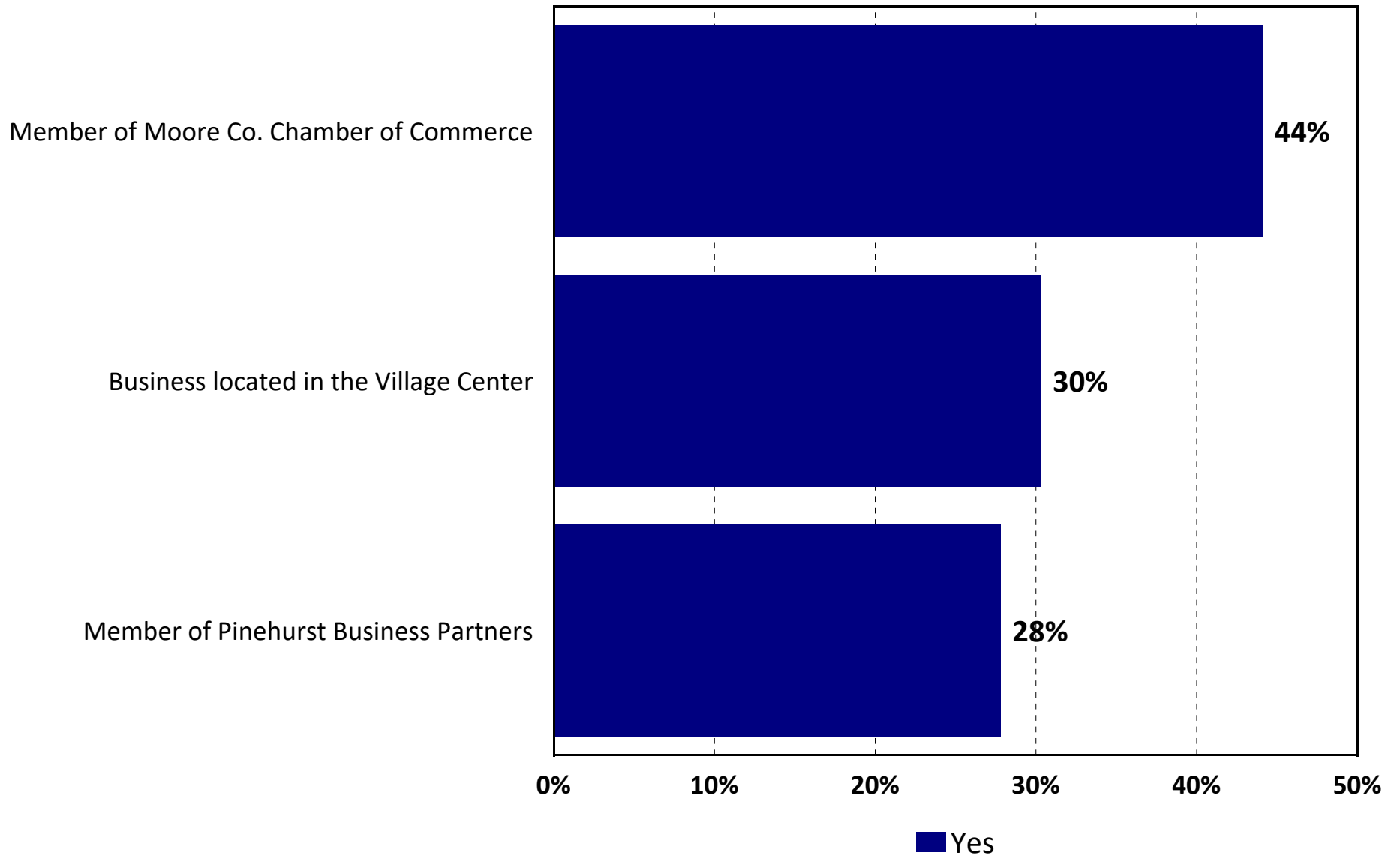
Q22. How many years have you been in operation in the Village?

by percentage of respondents (excluding "not provided")



Q23. Is Your Business Any of the Following:

by percentage of respondents who answered "yes"





2 Importance-Satisfaction Analysis

Importance-Satisfaction Analysis



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-seven percent (37.3%) of respondents selected *Streets and Grounds* as one of the most important services for the Village to provide.

With regard to satisfaction, 90.4% 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, 37.3% was multiplied by 9.6% (1-0.904). This yielded an I-S rating of 0.0358, 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.

Importance-Satisfaction Analysis



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.

2021 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 & Grounds | 37% | 4 | 90% | 7 | 0.0358 | 1 |
| Planning & Zoning | 23% | 6 | 89% | 8 | 0.0251 | 2 |
| Police Patrol | 59% | 1 | 96% | 6 | 0.0211 | 3 |
| Code Enforcement | 13% | 7 | 88% | 9 | 0.0166 | 4 |
| Fire Inspections | 29% | 5 | 98% | 5 | 0.0056 | 5 |
| Fire Emergency Response | 56% | 2 | 100% | 1 | 0.0000 | 6 |
| Police Emergency Response | 43% | 3 | 100% | 3 | 0.0000 | 7 |
| Building Inspections | 12% | 8 | 100% | 4 | 0.0000 | 8 |
| Village Hall (Front Desk) | 4% | 9 | 100% | 2 | 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 Analysis



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).

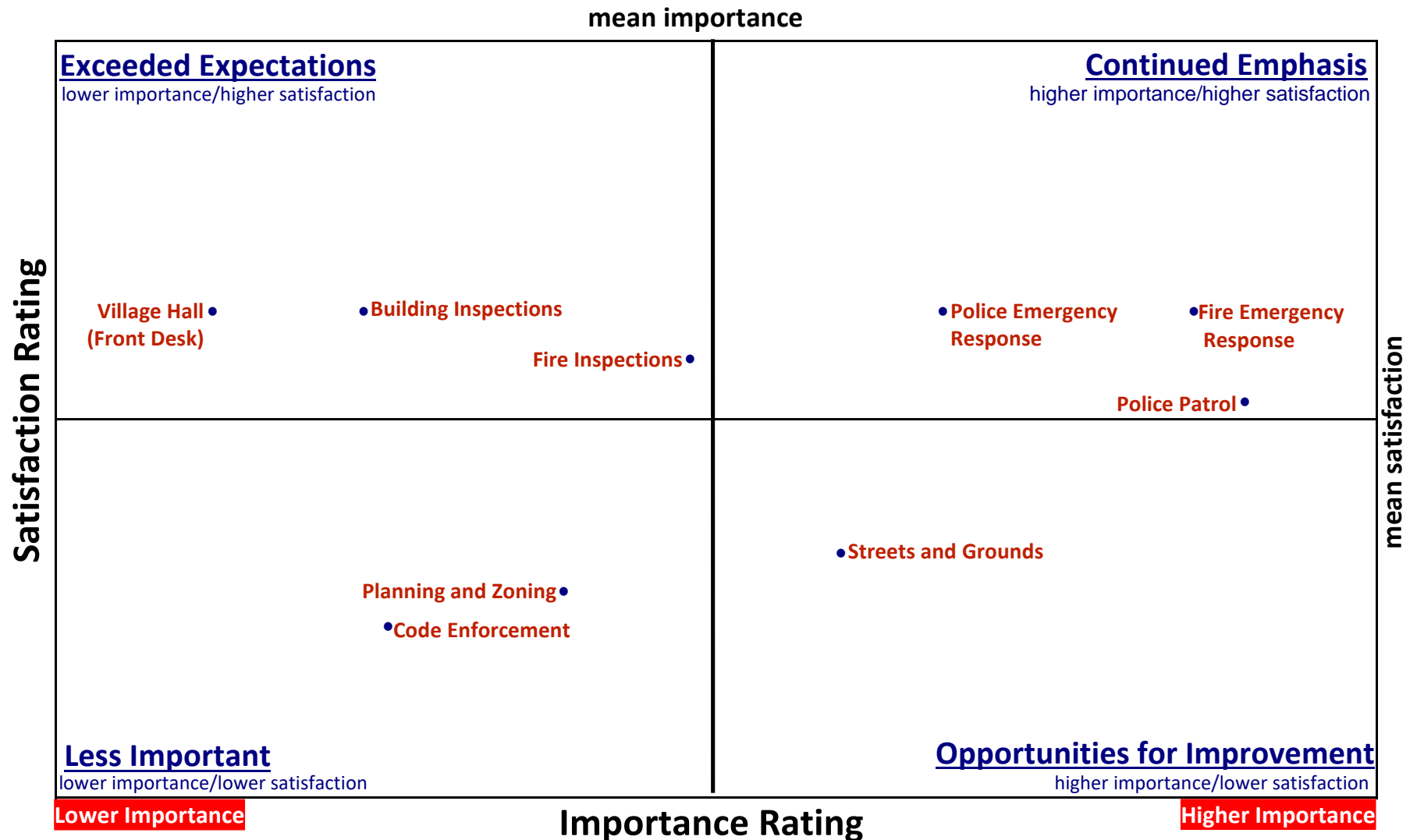
- **Continued Emphasis (above average importance and above average satisfaction).** This area shows where the Village is meeting customer expectations. Items in this area have a significant impact on the customer's overall level of satisfaction. The Village should maintain (or slightly increase) emphasis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

2021 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)



A large, dark blue circle with a white outline, containing the number '3' in a bold, dark blue font.

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 | 25.3% | 74.7% |
| Q1-2. Fire Inspections | 72.0% | 28.0% |
| Q1-3. Planning & Zoning | 25.3% | 74.7% |
| Q1-4. Code Enforcement | 14.7% | 85.3% |
| Q1-5. Police Patrol | 38.7% | 61.3% |
| Q1-6. Police Emergency Response | 24.0% | 76.0% |
| Q1-7. Fire Emergency Response | 18.7% | 81.3% |
| Q1-8. Village Hall (Front Desk) | 20.0% | 80.0% |
| Q1-9. Streets & Grounds | 29.3% | 70.7% |

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 | Don't know |
|---------------------------------|----------------|-----------|---------|--------------|------------|
| Q1-1. Building Inspections | 73.7% | 21.1% | 0.0% | 0.0% | 5.3% |
| Q1-2. Fire Inspections | 72.2% | 22.2% | 1.9% | 0.0% | 3.7% |
| Q1-3. Planning & Zoning | 52.6% | 31.6% | 5.3% | 5.3% | 5.3% |
| Q1-4. Code Enforcement | 36.4% | 27.3% | 9.1% | 0.0% | 27.3% |
| Q1-5. Police Patrol | 79.3% | 13.8% | 3.4% | 0.0% | 3.4% |
| Q1-6. Police Emergency Response | 83.3% | 0.0% | 11.1% | 0.0% | 5.6% |
| Q1-7. Fire Emergency Response | 100.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Q1-8. Village Hall (Front Desk) | 66.7% | 20.0% | 0.0% | 0.0% | 13.3% |
| Q1-9. Streets & Grounds | 54.5% | 31.8% | 9.1% | 0.0% | 4.5% |

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 |
|---------------------------------|----------------|-----------|---------|--------------|
| Q1-1. Building Inspections | 77.8% | 22.2% | 0.0% | 0.0% |
| Q1-2. Fire Inspections | 75.0% | 23.1% | 1.9% | 0.0% |
| Q1-3. Planning & Zoning | 55.6% | 33.3% | 5.6% | 5.6% |
| Q1-4. Code Enforcement | 50.0% | 37.5% | 12.5% | 0.0% |
| Q1-5. Police Patrol | 82.1% | 14.3% | 3.6% | 0.0% |
| Q1-6. Police Emergency Response | 88.2% | 0.0% | 11.8% | 0.0% |
| Q1-7. Fire Emergency Response | 100.0% | 0.0% | 0.0% | 0.0% |
| Q1-8. Village Hall (Front Desk) | 76.9% | 23.1% | 0.0% | 0.0% |
| Q1-9. Streets & Grounds | 57.1% | 33.3% | 9.5% | 0.0% |

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

| <u>Q2. Top choice</u> | <u>Number</u> | <u>Percent</u> |
|---------------------------|---------------|----------------|
| Building Inspections | 3 | 4.0 % |
| Fire Inspections | 11 | 14.7 % |
| Planning & Zoning | 7 | 9.3 % |
| Code Enforcement | 1 | 1.3 % |
| Police Patrol | 21 | 28.0 % |
| Police Emergency Response | 8 | 10.7 % |
| Fire Emergency Response | 12 | 16.0 % |
| Streets & Grounds | 9 | 12.0 % |
| None chosen | 3 | 4.0 % |
| Total | 75 | 100.0 % |

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

| <u>Q2. 2nd choice</u> | <u>Number</u> | <u>Percent</u> |
|---------------------------|---------------|----------------|
| Building Inspections | 2 | 2.7 % |
| Fire Inspections | 7 | 9.3 % |
| Planning & Zoning | 6 | 8.0 % |
| Code Enforcement | 5 | 6.7 % |
| Police Patrol | 12 | 16.0 % |
| Police Emergency Response | 17 | 22.7 % |
| Fire Emergency Response | 17 | 22.7 % |
| Village Hall (Front Desk) | 2 | 2.7 % |
| Streets & Grounds | 1 | 1.3 % |
| None chosen | 6 | 8.0 % |
| Total | 75 | 100.0 % |

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

| <u>Q2. 3rd choice</u> | <u>Number</u> | <u>Percent</u> |
|---------------------------|---------------|----------------|
| Building Inspections | 4 | 5.3 % |
| Fire Inspections | 4 | 5.3 % |
| Planning & Zoning | 4 | 5.3 % |
| Code Enforcement | 4 | 5.3 % |
| Police Patrol | 11 | 14.7 % |
| Police Emergency Response | 7 | 9.3 % |
| Fire Emergency Response | 13 | 17.3 % |
| Village Hall (Front Desk) | 1 | 1.3 % |
| Streets & Grounds | 18 | 24.0 % |
| None chosen | 9 | 12.0 % |
| 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)

| <u>Q2. Sum of top 3 choices</u> | <u>Number</u> | <u>Percent</u> |
|---------------------------------|---------------|----------------|
| Building Inspections | 9 | 12.0 % |
| Fire Inspections | 22 | 29.3 % |
| Planning & Zoning | 17 | 22.7 % |
| Code Enforcement | 10 | 13.3 % |
| Police Patrol | 44 | 58.7 % |
| Police Emergency Response | 32 | 42.7 % |
| Fire Emergency Response | 42 | 56.0 % |
| Village Hall (Front Desk) | 3 | 4.0 % |
| Streets & Grounds | 28 | 37.3 % |
| None chosen | 3 | 4.0 % |
| Total | 210 | |

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 of

| Pinehurst | Number | Percent |
|---|--------|---------|
| Significantly higher than your expectations | 5 | 6.7 % |
| Higher than your expectations | 26 | 34.7 % |
| Meets your expectations | 33 | 44.0 % |
| Below your expectations | 5 | 6.7 % |
| 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 of

| Pinehurst | Number | Percent |
|---|--------|---------|
| Significantly higher than your expectations | 5 | 7.2 % |
| Higher than your expectations | 26 | 37.7 % |
| Meets your expectations | 33 | 47.8 % |
| Below your expectations | 5 | 7.2 % |
| 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 | 21.3% | 36.0% | 25.3% | 4.0% | 4.0% | 9.3% |
| Q4-2. Availability of employee & customer parking around your business | 18.7% | 30.7% | 12.0% | 6.7% | 9.3% | 22.7% |
| Q4-3. Condition of sidewalks | 18.7% | 44.0% | 6.7% | 6.7% | 4.0% | 20.0% |
| Q4-4. Creating & promoting special events | 29.3% | 41.3% | 9.3% | 1.3% | 1.3% | 17.3% |
| Q4-5. Historic preservation efforts | 29.3% | 33.3% | 20.0% | 0.0% | 2.7% | 14.7% |
| Q4-6. Cleanliness of Village streets & public areas | 46.7% | 40.0% | 5.3% | 1.3% | 1.3% | 5.3% |
| Q4-7. Landscape maintenance in rights-of-way & public areas | 50.7% | 33.3% | 8.0% | 1.3% | 1.3% | 5.3% |
| Q4-8. Level of involvement in local decisions | 13.3% | 34.7% | 24.0% | 4.0% | 2.7% | 21.3% |

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 | 23.5% | 39.7% | 27.9% | 4.4% | 4.4% |
| Q4-2. Availability of employee & customer parking around your business | 24.1% | 39.7% | 15.5% | 8.6% | 12.1% |
| Q4-3. Condition of sidewalks | 23.3% | 55.0% | 8.3% | 8.3% | 5.0% |
| Q4-4. Creating & promoting special events | 35.5% | 50.0% | 11.3% | 1.6% | 1.6% |
| Q4-5. Historic preservation efforts | 34.4% | 39.1% | 23.4% | 0.0% | 3.1% |
| Q4-6. Cleanliness of Village streets & public areas | 49.3% | 42.3% | 5.6% | 1.4% | 1.4% |
| Q4-7. Landscape maintenance in rights-of-way & public areas | 53.5% | 35.2% | 8.5% | 1.4% | 1.4% |
| Q4-8. Level of involvement in local decisions | 16.9% | 44.1% | 30.5% | 5.1% | 3.4% |

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 | 45.3% | 40.0% | 9.3% | 0.0% | 1.3% | 4.0% |
| Q5-2. Overall quality of life | 44.0% | 42.7% | 8.0% | 0.0% | 0.0% | 5.3% |
| Q5-3. Overall feeling of safety | 54.7% | 34.7% | 8.0% | 0.0% | 0.0% | 2.7% |
| Q5-4. Quality of new commercial development in Village | 22.7% | 30.7% | 28.0% | 6.7% | 2.7% | 9.3% |
| Q5-5. Overall appearance of Village | 48.0% | 36.0% | 10.7% | 0.0% | 1.3% | 4.0% |

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 | 47.2% | 41.7% | 9.7% | 0.0% | 1.4% |
| Q5-2. Overall quality of life | 46.5% | 45.1% | 8.5% | 0.0% | 0.0% |
| Q5-3. Overall feeling of safety | 56.2% | 35.6% | 8.2% | 0.0% | 0.0% |
| Q5-4. Quality of new commercial development in Village | 25.0% | 33.8% | 30.9% | 7.4% | 2.9% |
| Q5-5. Overall appearance of Village | 50.0% | 37.5% | 11.1% | 0.0% | 1.4% |

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 | 30 | 40.0 % |
| Likely | 28 | 37.3 % |
| Somewhat likely | 8 | 10.7 % |
| Not likely | 4 | 5.3 % |
| Not likely at all | 2 | 2.7 % |
| Don't know | 3 | 4.0 % |
| Total | 75 | 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 | 30 | 41.7 % |
| Likely | 28 | 38.9 % |
| Somewhat likely | 8 | 11.1 % |
| Not likely | 4 | 5.6 % |
| Not likely at all | 2 | 2.8 % |
| Total | 72 | 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. Which following best describes overall business atmosphere in Village of Pinehurst today, compared to two years ago

| | Number | Percent |
|---------------------|--------|---------|
| Better | 31 | 41.3 % |
| No change, but good | 25 | 33.3 % |
| No change, but poor | 4 | 5.3 % |
| Worse | 6 | 8.0 % |
| Don't know | 9 | 12.0 % |
| 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. Which following best describes overall business atmosphere in Village of Pinehurst today, compared to two years ago

| | Number | Percent |
|---------------------|--------|---------|
| Better | 31 | 47.0 % |
| No change, but good | 25 | 37.9 % |
| No change, but poor | 4 | 6.1 % |
| Worse | 6 | 9.1 % |
| Total | 66 | 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)

| | Significantly better | Better | Same | Worse | Significantly worse | No opinion |
|--|----------------------|--------|-------|-------|---------------------|------------|
| Q8-1. Overall quality of life | 20.0% | 26.7% | 10.7% | 2.7% | 1.3% | 38.7% |
| Q8-2. Overall quality of Village services | 9.3% | 29.3% | 21.3% | 1.3% | 0.0% | 38.7% |
| Q8-3. Customer service provided by Village employees | 9.3% | 26.7% | 21.3% | 1.3% | 0.0% | 41.3% |

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)

| | Significantly better | Better | Same | Worse | Significantly worse |
|--|----------------------|--------|-------|-------|---------------------|
| Q8-1. Overall quality of life | 32.6% | 43.5% | 17.4% | 4.3% | 2.2% |
| Q8-2. Overall quality of Village services | 15.2% | 47.8% | 34.8% | 2.2% | 0.0% |
| Q8-3. Customer service provided by Village employees | 15.9% | 45.5% | 36.4% | 2.3% | 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 Village of Pinehurst customer service | Number | Percent |
|--|--------|---------|
| Very good | 31 | 41.3 % |
| Good | 28 | 37.3 % |
| Poor | 2 | 2.7 % |
| Don't know | 14 | 18.7 % |
| 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 Village of Pinehurst customer service | Number | Percent |
|--|--------|---------|
| Very good | 31 | 50.8 % |
| Good | 28 | 45.9 % |
| Poor | 2 | 3.3 % |
| Total | 61 | 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 | Don't know |
|---|----------------|-------|---------|----------|------------|
| Q10-1. Village staff was responsive to my needs | 33.3% | 29.3% | 5.3% | 1.3% | 30.7% |
| Q10-2. Village staff was competent | 28.0% | 30.7% | 8.0% | 1.3% | 32.0% |
| Q10-3. Village staff was courteous | 34.7% | 26.7% | 4.0% | 1.3% | 33.3% |
| Q10-4. My issue was resolved promptly | 29.3% | 24.0% | 9.3% | 1.3% | 36.0% |

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 |
|---|----------------|-------|---------|----------|
| Q10-1. Village staff was responsive to my needs | 48.1% | 42.3% | 7.7% | 1.9% |
| Q10-2. Village staff was competent | 41.2% | 45.1% | 11.8% | 2.0% |
| Q10-3. Village staff was courteous | 52.0% | 40.0% | 6.0% | 2.0% |
| Q10-4. My issue was resolved promptly | 45.8% | 37.5% | 14.6% | 2.1% |

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 the job Village of Pinehurst does communicating with business owners

| | Number | Percent |
|-------------------|--------|---------|
| Very satisfied | 19 | 25.3 % |
| Satisfied | 26 | 34.7 % |
| Neutral | 19 | 25.3 % |
| Dissatisfied | 3 | 4.0 % |
| Very dissatisfied | 2 | 2.7 % |
| Don't know | 6 | 8.0 % |
| 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 the job Village of Pinehurst does communicating with business owners

| | Number | Percent |
|-------------------|--------|---------|
| Very satisfied | 19 | 27.5 % |
| Satisfied | 26 | 37.7 % |
| Neutral | 19 | 27.5 % |
| Dissatisfied | 3 | 4.3 % |
| Very dissatisfied | 2 | 2.9 % |
| Total | 69 | 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 | 41 | 54.7 % |
| No | 31 | 41.3 % |
| Don't know | 3 | 4.0 % |
| Total | 75 | 100.0 % |

WITHOUT "DON'T KNOW"

Q12. Have you visited the Village's website (vopnc.org) during the last 12 months? (without "don't know")

| Q12. Have you visited Village's website (vopnc.org) during last 12 months | Number | Percent |
|---|--------|---------|
| Yes | 41 | 56.9 % |
| No | 31 | 43.1 % |
| Total | 72 | 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=41)

| | Very good | Good | Average | Poor | Don't know |
|--|-----------|-------|---------|------|------------|
| Q12a-1. Easy to navigate | 34.1% | 31.7% | 26.8% | 2.4% | 4.9% |
| Q12a-2. Availability of information about Village services | 43.9% | 34.1% | 14.6% | 2.4% | 4.9% |

WITHOUT "DON'T KNOW"

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. (without "don't know")

(N=41)

| | Very good | Good | Average | Poor |
|--|-----------|-------|---------|------|
| Q12a-1. Easy to navigate | 35.9% | 33.3% | 28.2% | 2.6% |
| Q12a-2. Availability of information about Village services | 46.2% | 35.9% | 15.4% | 2.6% |

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 of Pinehurst website | Number | Percent |
|--|--------|---------|
| Very satisfied | 10 | 24.4 % |
| Satisfied | 22 | 53.7 % |
| Neutral | 9 | 22.0 % |
| Total | 41 | 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 | 65 | 86.7 % |
| Don't know | 2 | 2.7 % |
| Total | 75 | 100.0 % |

WITHOUT "DON'T KNOW"**Q13. Have you used the Village's mobile app (MY VOP) during the last 12 months? (without "don't know")**

| Q13. Have you used Village's mobile app (MY VOP) during last 12 months | Number | Percent |
|--|--------|---------|
| Yes | 8 | 11.0 % |
| No | 65 | 89.0 % |
| Total | 73 | 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 | 3 | 37.5 % |
| Satisfied | 3 | 37.5 % |
| Neutral | 2 | 25.0 % |
| Total | 8 | 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. Which following are the best ways for Village to communicate with you to get important information to your business

| | Number | Percent |
|--|--------|---------|
| Direct mail | 27 | 36.0 % |
| Village website | 14 | 18.7 % |
| Email (monthly business eNews) | 50 | 66.7 % |
| Workshops/business forums | 8 | 10.7 % |
| Social media | 14 | 18.7 % |
| Personal calls/visits | 15 | 20.0 % |
| Newsletters | 15 | 20.0 % |
| Brochures | 1 | 1.3 % |
| MY VOP mobile app | 2 | 2.7 % |
| Engage Pinehurst online engagement portal (engage.vopnc.org) | 2 | 2.7 % |
| Other | 5 | 6.7 % |
| Total | 153 | |

Q14-11. Other

| Q14-11. Other | Number | Percent |
|---------------|--------|---------|
| Text | 2 | 40.0 % |
| The Pilot | 1 | 20.0 % |
| Instagram | 1 | 20.0 % |
| Phone alerts | 1 | 20.0 % |
| Total | 5 | 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 | 20.0% | 29.3% | 29.3% | 4.0% | 4.0% | 13.3% |
| Q15-2. Business signage regulations | 24.0% | 32.0% | 21.3% | 10.7% | 2.7% | 9.3% |
| Q15-3. Historic District Guidelines | 25.3% | 33.3% | 24.0% | 0.0% | 4.0% | 13.3% |

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 | 23.1% | 33.8% | 33.8% | 4.6% | 4.6% |
| Q15-2. Business signage regulations | 26.5% | 35.3% | 23.5% | 11.8% | 2.9% |
| Q15-3. Historic District Guidelines | 29.2% | 38.5% | 27.7% | 0.0% | 4.6% |

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. Farmers Markets | 37.3% | 60.0% | 1.3% | 1.3% |
| Q16-2. Live After Five Concerts | 38.7% | 57.3% | 1.3% | 2.7% |
| Q16-3. Parades (e.g. Fourth of July, St. Patrick's Day, US Kids) | 36.0% | 57.3% | 4.0% | 2.7% |
| Q16-4. Holly Arts & Crafts Festival | 41.3% | 53.3% | 4.0% | 1.3% |
| Q16-5. Tree Lighting | 42.7% | 53.3% | 1.3% | 2.7% |
| Q16-6. Shakespeare in the Pines | 29.3% | 64.0% | 1.3% | 5.3% |
| Q16-7. Sandhills Motoring Festival | 37.3% | 57.3% | 1.3% | 4.0% |
| Q16-8. Other cultural activities (e.g. performing arts) | 36.0% | 50.7% | 0.0% | 13.3% |

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. Farmers Markets | 37.8% | 60.8% | 1.4% |
| Q16-2. Live After Five Concerts | 39.7% | 58.9% | 1.4% |
| Q16-3. Parades (e.g. Fourth of July, St. Patrick's Day, US Kids) | 37.0% | 58.9% | 4.1% |
| Q16-4. Holly Arts & Crafts Festival | 41.9% | 54.1% | 4.1% |
| Q16-5. Tree Lighting | 43.8% | 54.8% | 1.4% |
| Q16-6. Shakespeare in the Pines | 31.0% | 67.6% | 1.4% |
| Q16-7. Sandhills Motoring Festival | 38.9% | 59.7% | 1.4% |
| Q16-8. Other cultural activities (e.g. performing arts) | 41.5% | 58.5% | 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 | 23 | 30.7 % |
| Satisfied | 28 | 37.3 % |
| Neutral | 13 | 17.3 % |
| Dissatisfied | 1 | 1.3 % |
| Very dissatisfied | 1 | 1.3 % |
| Don't know | 9 | 12.0 % |
| 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 | 23 | 34.8 % |
| Satisfied | 28 | 42.4 % |
| Neutral | 13 | 19.7 % |
| Dissatisfied | 1 | 1.5 % |
| Very dissatisfied | 1 | 1.5 % |
| Total | 66 | 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 | 38.7% | 32.0% | 18.7% | 0.0% | 6.7% | 4.0% |
| Q18-2. Safety & security | 44.0% | 42.7% | 10.7% | 0.0% | 0.0% | 2.7% |
| Q18-3. Availability of trained employees | 28.0% | 28.0% | 21.3% | 4.0% | 12.0% | 6.7% |
| Q18-4. Low property tax rate | 36.0% | 20.0% | 16.0% | 10.7% | 8.0% | 9.3% |
| Q18-5. Quality healthcare | 45.3% | 28.0% | 9.3% | 2.7% | 8.0% | 6.7% |
| Q18-6. Affordable rent | 33.3% | 26.7% | 14.7% | 6.7% | 8.0% | 10.7% |
| Q18-7. Proximity to family or friends | 30.7% | 26.7% | 14.7% | 9.3% | 12.0% | 6.7% |
| Q18-8. Quality of public education | 41.3% | 20.0% | 17.3% | 2.7% | 9.3% | 9.3% |
| Q18-9. Overall quality of life in Village | 49.3% | 30.7% | 12.0% | 0.0% | 4.0% | 4.0% |

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 | 40.3% | 33.3% | 19.4% | 0.0% | 6.9% |
| Q18-2. Safety & security | 45.2% | 43.8% | 11.0% | 0.0% | 0.0% |
| Q18-3. Availability of trained employees | 30.0% | 30.0% | 22.9% | 4.3% | 12.9% |
| Q18-4. Low property tax rate | 39.7% | 22.1% | 17.6% | 11.8% | 8.8% |
| Q18-5. Quality healthcare | 48.6% | 30.0% | 10.0% | 2.9% | 8.6% |
| Q18-6. Affordable rent | 37.3% | 29.9% | 16.4% | 7.5% | 9.0% |
| Q18-7. Proximity to family or friends | 32.9% | 28.6% | 15.7% | 10.0% | 12.9% |
| Q18-8. Quality of public education | 45.6% | 22.1% | 19.1% | 2.9% | 10.3% |
| Q18-9. Overall quality of life in Village | 51.4% | 31.9% | 12.5% | 0.0% | 4.2% |

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

- Controlling growth
- covid-19
- Covid and Mayor advocating responsibility to Washington DC. Infrastructure to keep up with growth.
- Covid- restructure socialization
- covid-19
- Covid-Have seen a lot of out of state cars(golfers)-think they are contributing to the amount of Covid.
- Development
- expansion
- Growth
- Growth
- Growth & traffic.
- Growth and handling the growth.
- Growth, schools, & managing traffic.
- Growth/Infrastructure
- Housing shortage for reasonably priced homes.
- Hwy 5 is a cluster
- Keeping businesses open in the Village.
- Lack of medium range priced homes. Need more retail
- Lack of retail in the Village. We have nice stores but they are frequently closed. More shopping makes for a more pleasant experience for the wives of those who are here for golfing trips. Broad St in Southern Pines has more to offer visitors.
- Let the hotel tax pass. It foolish to stand in the way of money's that will elevate the value of our tourism.
- Maintain small town atmosphere.
- Management of growth, roads, infrastructure. The traffic circle needs to be addressed.
- managing growth and accommodating younger families
- Managing growth and not loose character
- Need more businesses to attract people. Businesses need to stay open during events.
- No parking . Appearance is pitiful . No lighting at night. Should be ashamed . Plantings are horrible.
- Overall growth.
- Parking
- Parking
- Parking for businesses in the heart of the Village.
- Pinehurst needs to make sure that its lovely wooded areas are preserved and not completely demolished in favor of homes and businesses. It is important to preserve the natural areas, or it will no longer be a beautiful place.
- Population growth and traffic
- Population growth, even if only during M-F 8-5, and not enough emergency services personnel to respond in a timely manner.
- Positive growth and expansion. Good and careful planning are important.
- Positive Growth Opportunities VS The Desire to Remain a Quiet Quaint Village
- Public transportation.
- The council.
- The PGA Complex will ruin Pinehurst's quality.
- Traffic
- Traffic and over developing.
- Traffic and parking
- Traffic congestion

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

- Traffic, condition of the streets, zoning committee.
- Traffic, especially in the village. Speeding on Chinquapin is an issue. Maintaining the village sidewalks. The brick is uneven with significant gaps in many places. I personally have broken heels on shoes and trip frequently.
- Traffic, police need to enforce the speed limits.
- Upgrading streetscape to match expectations of Visitors when they come to the Home of American Golf. It seems we should have white lights in trees year-round and make it look magical as I think it is and upgrade trees and add more greening to village.
- Zoning-encroachment of mass merchant big box on the village.

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

- All is good
- Better response time.
- Don't be so strict on grant money. After spending a great deal of money upgrading my property, a small grant was turned down because I did the landscaping work in advance even though I had before and after images. Seems like a silly technicality after spending so much to enhance a building that is so important to the overall look of the Village.
- Extend all services to Taylortown (Olmsted Village) area.
- Find zoning information online easier.
- I would really like to see the downtown area of the Village completely pedestrianized. Especially Chinquapin and Market Square. This would provide wonderful gathering and eating spaces and more.
- Keep 5-8 Shop Late
- Let everyone know better about events and road blockages
- Lighting and police patrol. Too dark to be open after dark.
- More police presence in the neighborhoods and improve prosecutions of all crimes.
- Need sidewalks and off street parking.
- Offer trash pick up to small business/offices in the hospital area.
- Parking
- Provide transportation.
- Recycling for businesses.
- Respond to emails.
- Signage
- Signage is confusing at best - it seems there are resort signs and signs that say "Village Shops" but nothing and I repeat nothing saying the Historic Village of Pinehurst is this way - we are more than Village Shops - we are the Historic Village of Pinehurst. When you combine that with no signs directing people walking from the hotel and the confusing street names changing I think we need a professional to evaluate this issue and resolve it because right now we are too hard to find for those who haven't been here before.
- Slow down the traffic that is ripping thru the center of the village and trim back hedges and trees that block visibility and are impassable for two cars due to overgrown shrubs.
- We were arbitrarily placed into the Historic District even though we were in the Service District. We are major stakeholder on Rattlesnake Trail - yet were never interviewed or contacted regarding the Re-Envision of our street. We have participated in the zoom. The staff has been very responsive when we have needed answers. They are NOT the issue. The staff is great and this is not a complaint about them. They are bound by the rules of the council, and their rules and regs. I will be absolutely shocked if anyone reaches out to follow up with my comments. We feel as though we are "red headed step-children." I have lived her for over 40 years. Somehow we managed to make Pinehurst nice enough for the population increase - some who have been here for a short while and yet they think they know better. Hmmm.

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

| Q21. What is the primary business category for your business | Number | Percent |
|--|--------|---------|
| Retail | 6 | 8.0 % |
| Restaurants & Food Services | 3 | 4.0 % |
| Inn | 2 | 2.7 % |
| Professional, Scientific, & Technical Services | 9 | 12.0 % |
| Financial & Insurance | 4 | 5.3 % |
| Real Estate & Rental Leasing | 11 | 14.7 % |
| Health Care & Social Assistance | 21 | 28.0 % |
| Arts, Entertainment, & Recreation | 2 | 2.7 % |
| Other | 11 | 14.7 % |
| Not provided | 6 | 8.0 % |
| Total | 75 | 100.0 % |

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

| Q21. What is the primary business category for your business | Number | Percent |
|--|--------|---------|
| Retail | 6 | 8.7 % |
| Restaurants & Food Services | 3 | 4.3 % |
| Inn | 2 | 2.9 % |
| Professional, Scientific, & Technical Services | 9 | 13.0 % |
| Financial & Insurance | 4 | 5.8 % |
| Real Estate & Rental Leasing | 11 | 15.9 % |
| Health Care & Social Assistance | 21 | 30.4 % |
| Arts, Entertainment, & Recreation | 2 | 2.9 % |
| Other | 11 | 15.9 % |
| Total | 69 | 100.0 % |

Q21-9. Other

| Q21-9. Other | Number | Percent |
|--|--------|---------|
| Travel and tourism | 1 | 9.1 % |
| Commercial printing | 1 | 9.1 % |
| Non-profit | 1 | 9.1 % |
| Metal fabrication, powder coating and tooling | 1 | 9.1 % |
| Non-profit membership organization, promoting Scottish culture | 1 | 9.1 % |
| Printing service | 1 | 9.1 % |
| Foundation | 1 | 9.1 % |
| Liquor store | 1 | 9.1 % |
| Private club and neighborhood | 1 | 9.1 % |
| Hair salon | 1 | 9.1 % |
| Grocery store | 1 | 9.1 % |
| Total | 11 | 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 Village of Pinehurst | Number | Percent |
|---|--------|---------|
| 0-5 years | 12 | 16.0 % |
| 6-10 years | 7 | 9.3 % |
| 11-15 years | 11 | 14.7 % |
| 16-20 years | 5 | 6.7 % |
| 20+ years | 35 | 46.7 % |
| Not provided | 5 | 6.7 % |
| 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 Village of Pinehurst | Number | Percent |
|---|--------|---------|
| 0-5 years | 12 | 17.1 % |
| 6-10 years | 7 | 10.0 % |
| 11-15 years | 11 | 15.7 % |
| 16-20 years | 5 | 7.1 % |
| 20+ years | 35 | 50.0 % |
| Total | 70 | 100.0 % |

Q23. Please answer the following questions.

(N=75)

| | Yes | No | Not provided |
|---|-------|-------|--------------|
| Q23-1. Are you a member of Pinehurst Business Partners | 20.0% | 52.0% | 28.0% |
| Q23-2. Are you a member of Moore County Chamber of Commerce | 34.7% | 44.0% | 21.3% |
| Q23-3. Is your business located in Village Center | 26.7% | 61.3% | 12.0% |

WITHOUT "NOT PROVIDED"

Q23. Please answer the following questions. (without "not provided")

(N=75)

| | Yes | No |
|---|-------|-------|
| Q23-1. Are you a member of Pinehurst Business Partners | 27.8% | 72.2% |
| Q23-2. Are you a member of Moore County Chamber of Commerce | 44.1% | 55.9% |
| Q23-3. Is your business located in Village Center | 30.3% | 69.7% |



4 Survey Instrument



HISTORY, CHARM, AND SOUTHERN HOSPITALITY _____

July 2021

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.2021PinehurstBusinessSurvey.com.

The survey data will be collected and analyzed by ETC Institute, one of the nation's leading governmental research firms, and Village staff. Results will be presented 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 2021 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



2021 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 |
| 8. | Level of involvement in local decisions | 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 |
| 4. | Quality of new commercial development in the Village | 5 | 4 | 3 | 2 | 1 | 9 |
| 5. | Overall appearance of the Village | 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 (06) Personal calls/visits (10) Engage Pinehurst online engagement portal
 (02) Village website (07) Newsletters
 (03) Email (Monthly Business eNews) (08) Brochures (engage.vopnc.org)
 (04) Workshops/Business Forums (09) MY VOP mobile app (11) Other: _____
 (05) Social media

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. | Farmers 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.