



Neighborhood Quality of Life Survey
July 13, 2022

Neighborhood Quality of Life Survey



Quick Facts on Survey Partner:

ETC Institute, Olathe, KS

- A National Leader in Market Research for Local Governmental Organizations
- Surveyed more than 2,000,000 persons since 2010 for more than 900 communities in 49 states.
- Conducts the Village's annual Community and Business Surveys

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Quick Facts on Survey Methodology:

Survey Goals:

- Representative sample of Village of Pinehurst residences with regard to geographic dispersion, age, gender, and race/ethnicity
- Postcard mailings with QR code and link to survey for 4,000 residences
- Sample size to be no less than 350 verified completed surveys
- Margin of error of +/- 5.5% at the 95% confidence level

Timeline:

- Approximately two weeks (June 23-week of July 4). The timeline was determined by the number of verified responses to meet margin of error goal.

Survey Tool:

- Electronic survey accessed via QR code or link on postcard
- Responses were verified via required question at end of survey

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General Results

General Survey Results:

- 401 verified responses
- Margin of error +/- 4.8% at 95% confidence level
- The response percentages by neighborhood closely mirrors the neighborhood response percentage from the 2021 Community Survey

Analysis:

- The Village of Pinehurst considers a difference of **+/- 10% to be a significant finding**. The term “significant” in this presentation refers to instances where findings represent this margin.

Neighborhoods	NQL Survey %	2021 Comm. Survey %
Pinehurst #6	18%	18%
Pinehurst Trace/Pinedale/Midland CC/Taylorhurst/Walker Station	3%	5%
Pinehurst No. 7/Lawn & Tennis/CCNC	3%	6%
Morganton/Monticello	8%	9%
Lake Pinehurst/Burning Tree/St. Andrews/Cotswold	26%	26%
Pinewild	8%	11%
Old Town/Linden/Donald Ross/Clarendon Gardens	19%	14%
Village Acres/Murdocksville	12%	8%
Not Provided	3%	1%

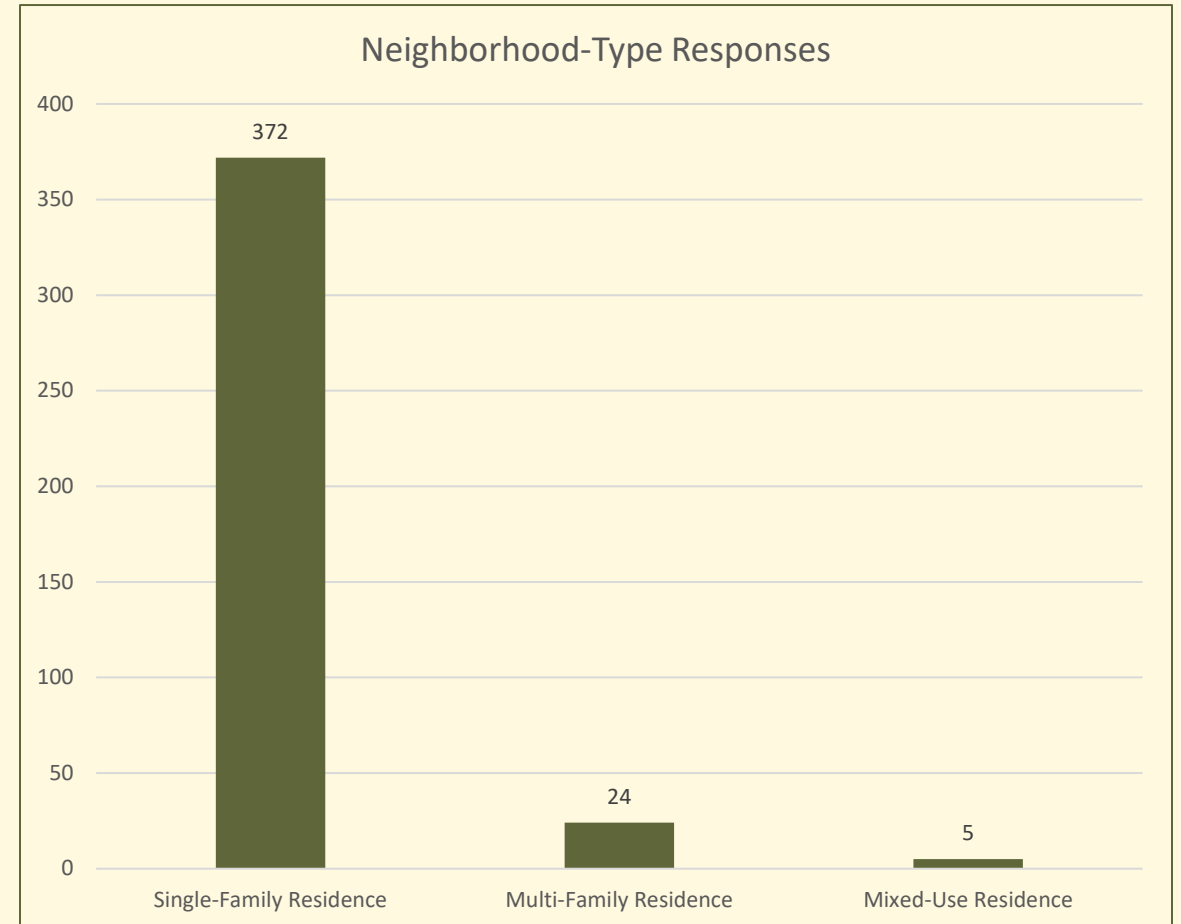
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General Results

Survey Findings:

- Participants self-selected their neighborhood type from three categories: Single-family, Multi-family, Mixed-use
- Approximately 93% of respondents selected single-family to the question “How would you describe your immediate neighborhood?”
- The small number of multi-family and mixed-use responses makes it difficult to draw clear conclusions from these two groups.



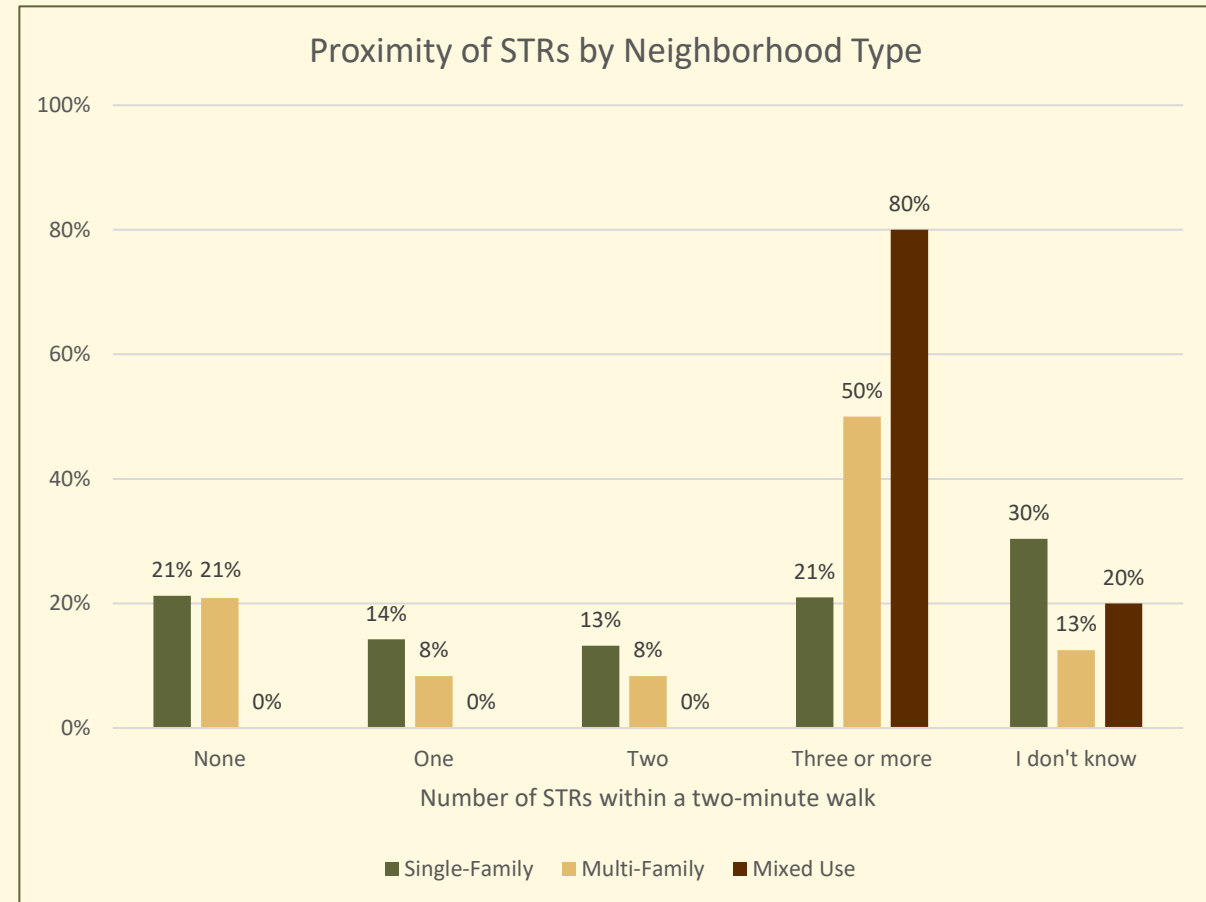
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Short-Term Rental Results

Survey Findings:

- The survey asked respondents “How many vacation rentals or short-term rental properties are within a two-minute walk of your front door?”
- 48% of single-family respondents stated that they perceived **AT LEAST** one vacation or short-term rental property within a two-minute walk of their front door.



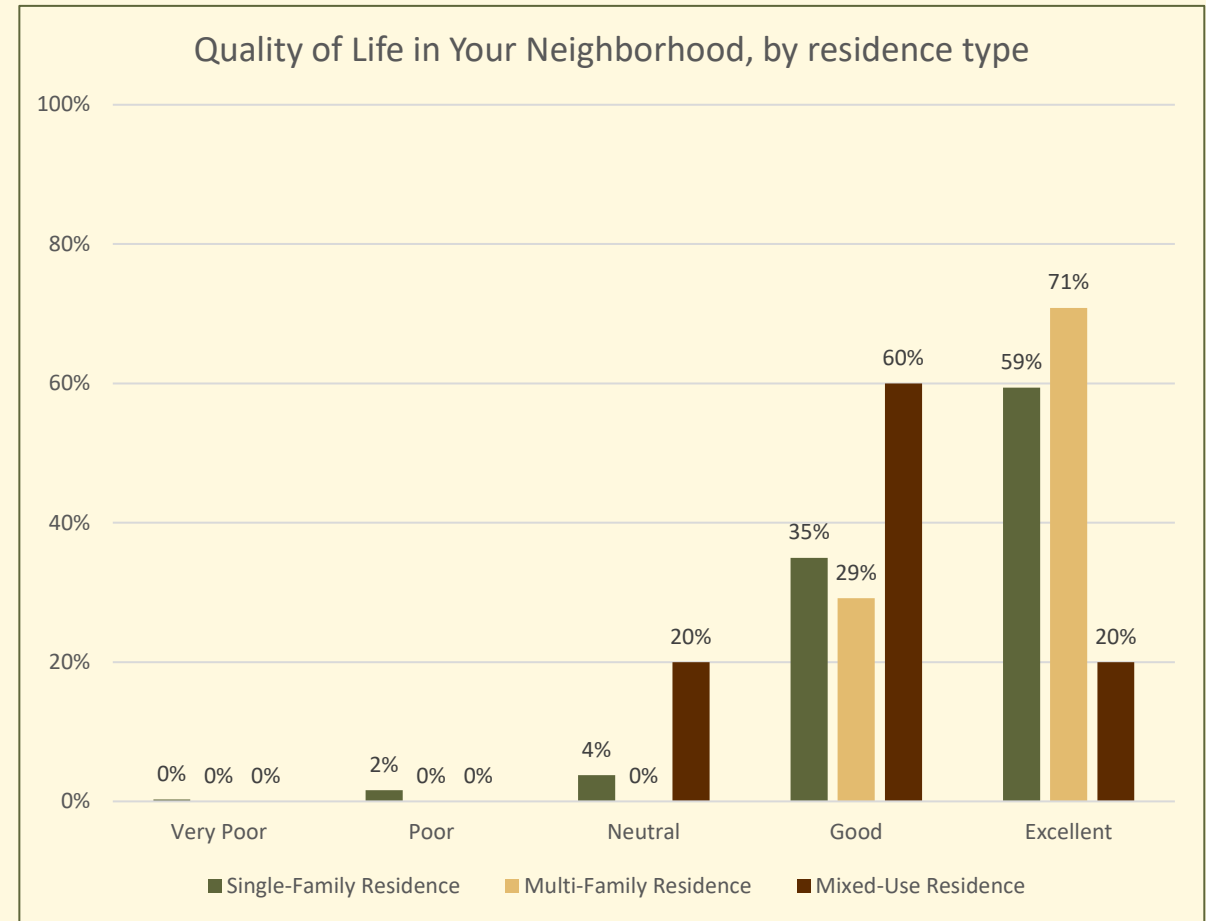
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Overall Quality of Life

Survey Findings:

- In general, respondents positively rated the quality of life in their immediate neighborhoods.
- **94% of single-family resident respondents** selected either *good* or *excellent* when rating the quality of life in their immediate neighborhood.



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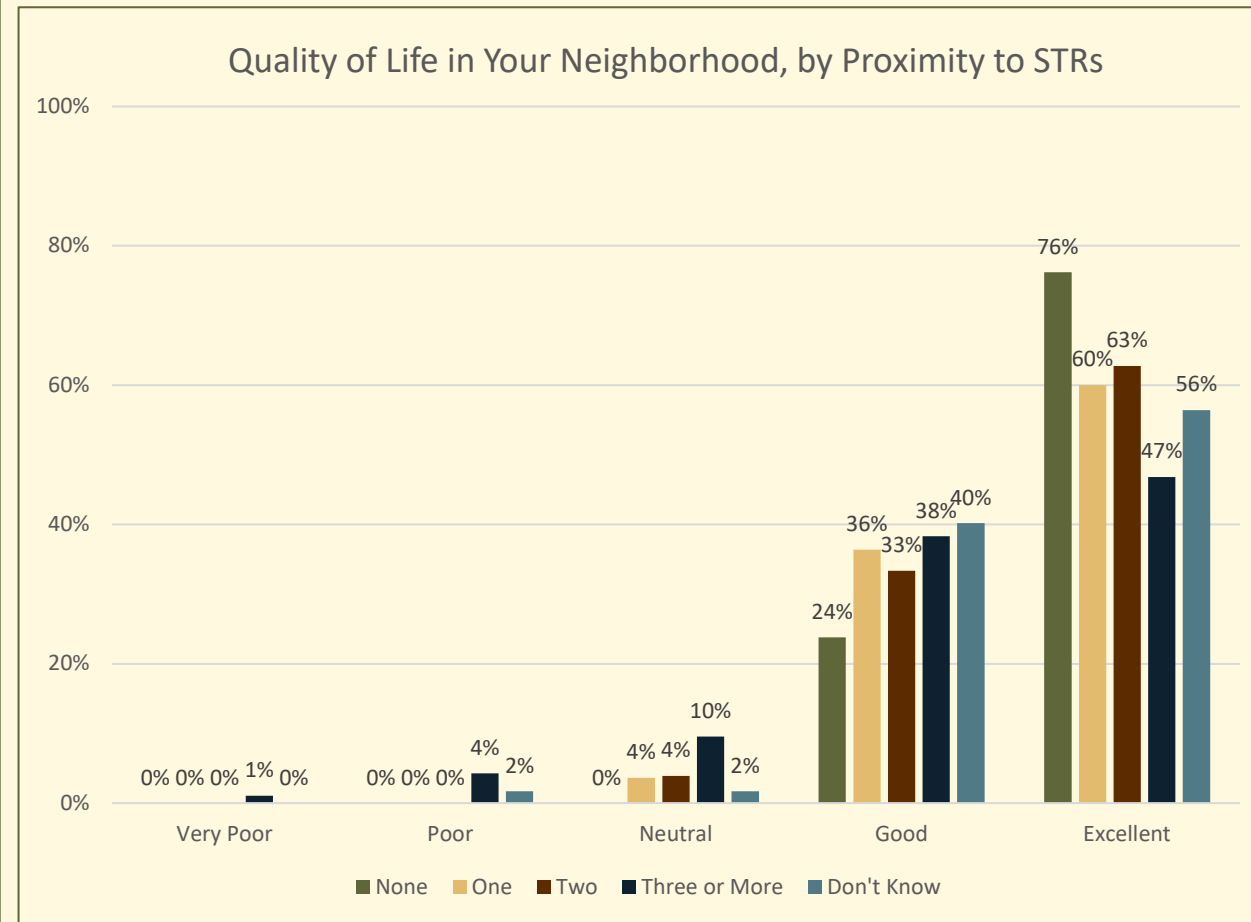
Overall Quality of Life

Survey Findings:

- When segmenting solely by proximity to short-term rentals, **76% of respondents with no perceived vacation or short-term rental in proximity** rated their quality of life as *excellent*.

By comparison:

- One rental property – 60%
 - Two rental properties – 63%
 - Three or more rental properties – 47%
 - Don't know – 56%
- Respondents with one or more perceived vacation or short-term rentals were more likely to select *good* over *excellent* for the quality of life in their immediate neighborhood, compared to those perceiving no such rentals.



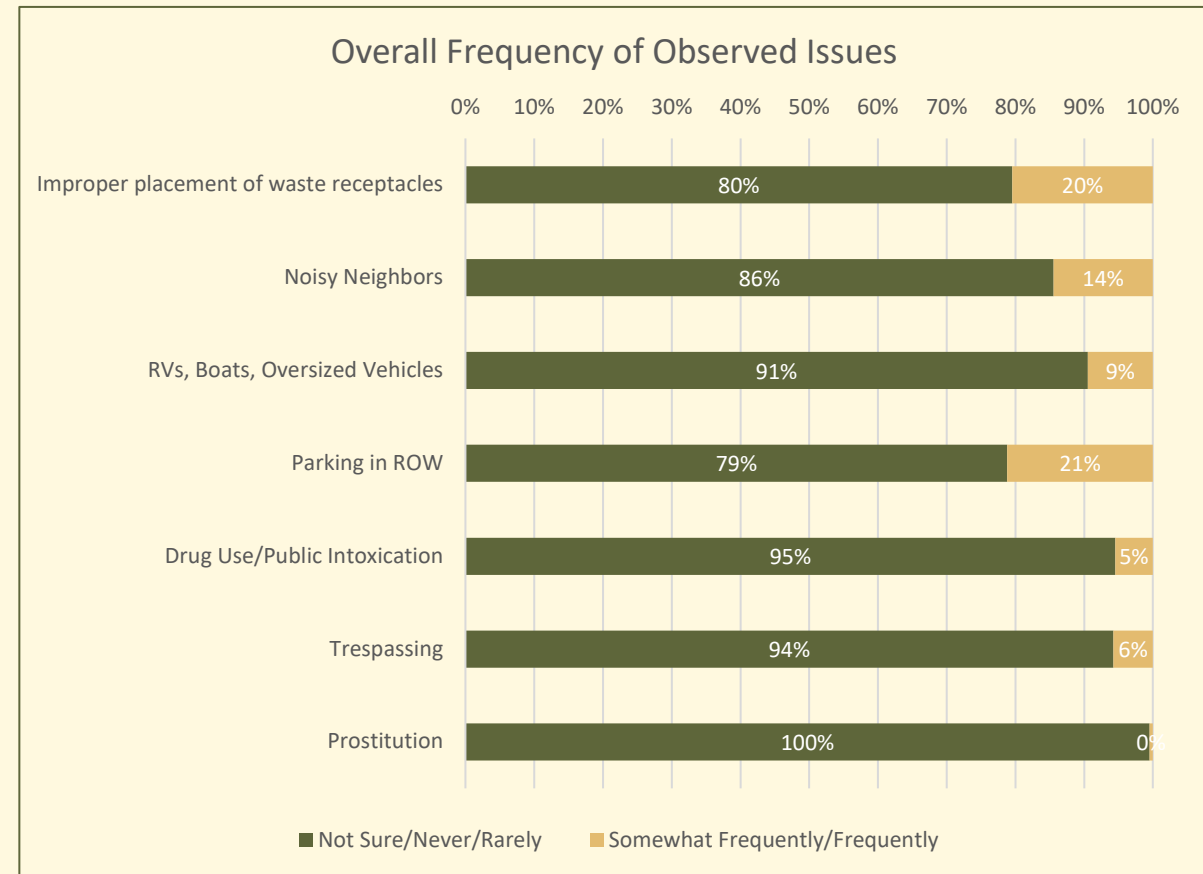
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Overall Frequency of Observed Issues

Survey Findings:

- Overall, a majority of survey respondents did not *somewhat frequently* or *frequently* see any of the potential selections.
- **21% of survey respondents** observed parking in the right of way at least *somewhat frequently*, the highest percentage of the seven issues identified within the survey.
- Drug use/Public intoxication and trespassing were observed at least *somewhat frequently* in 5% and 6% of survey respondents, respectively.

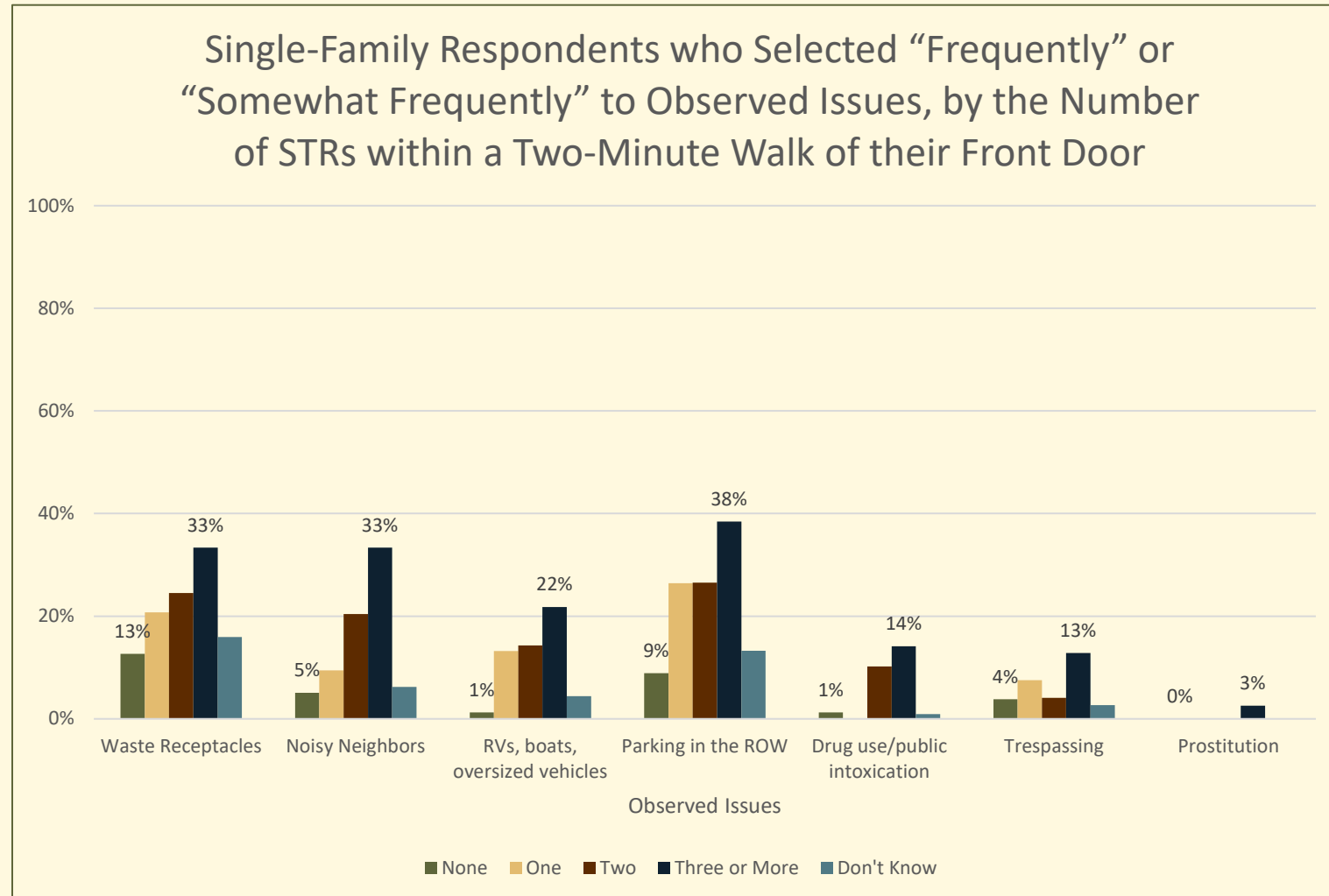


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Survey Findings:

- When filtering for single-family neighborhood respondents, those reporting zero vacation or short-term rentals were less likely to observe all issues at a *somewhat frequent* or *frequent* rate.
- Waste receptacles, noisy neighbors, oversized vehicles, ROW parking, and drug use/public intoxication all saw a **significant increase** in observed frequencies between no vacation or short-term rentals identified within a two-minute walk and those identifying three or more.
- 21% of single-family respondents chose three or more vacation or short-term rentals within their proximity. Of the 21%, **38% observed at least *somewhat frequent* issues with parking in the ROW**, the highest of all measured issues.



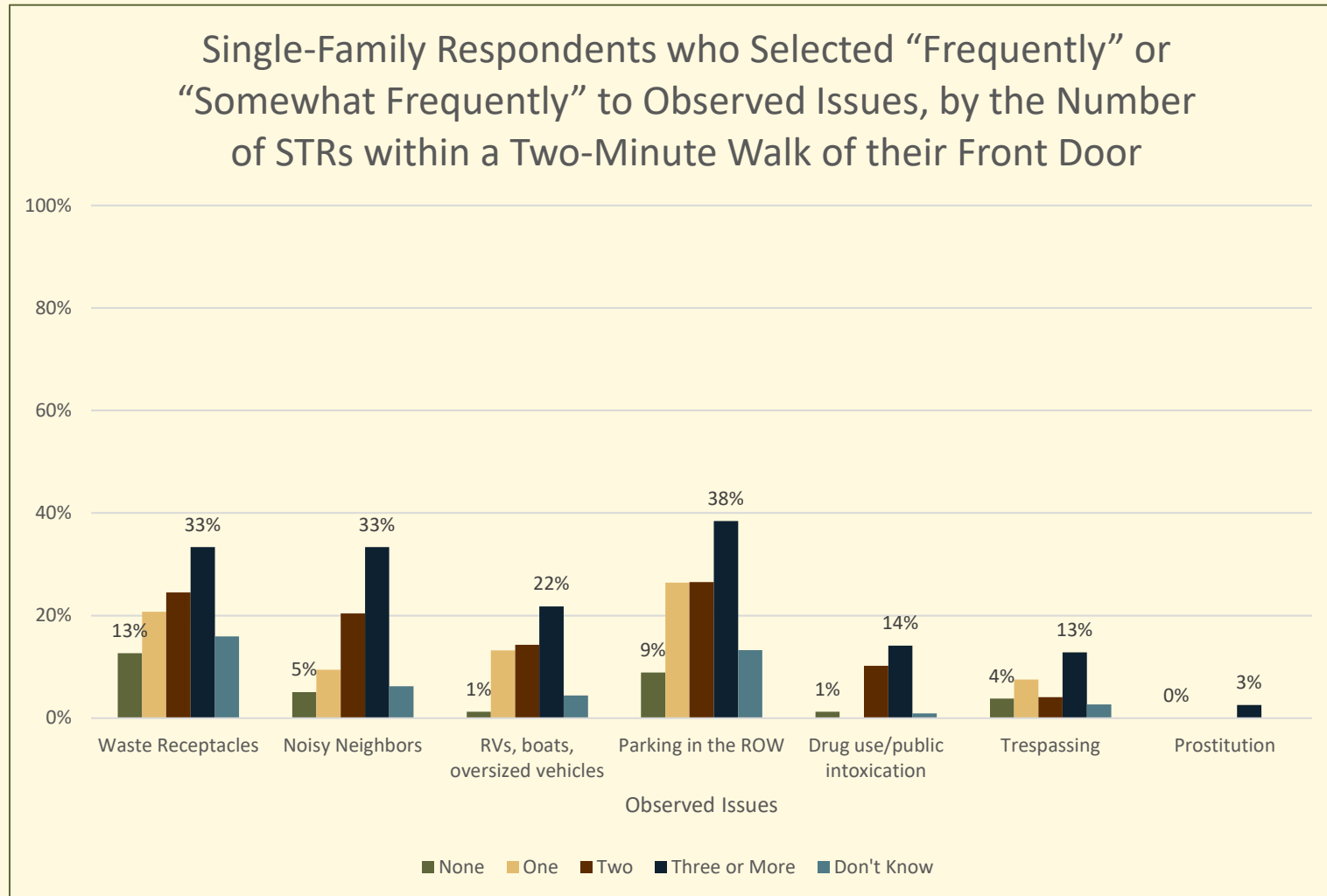
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Survey Findings:

Compared to respondents who reported no vacation/short-term rentals in proximity to their home, respondents who reported 3 or more rentals were approximately:

- 1) 2.5 times more likely to observe *somewhat frequent* or *frequent* issues with waste receptacles
- 2) 6.6 times more likely to observe *somewhat frequent* or *frequent* issues with noisy neighbors
- 3) 22 times more likely to observe *somewhat frequent* or *frequent* issues with oversized vehicles
- 4) 4.2 times more likely to observe *somewhat frequent* or *frequent* issues with ROW parking
- 5) 14 times more likely to observe *somewhat frequent* or *frequent* issues with drug/use/public intoxication
- 6) 3 times more likely to observe *somewhat frequent* or *frequent* issues with prostitution



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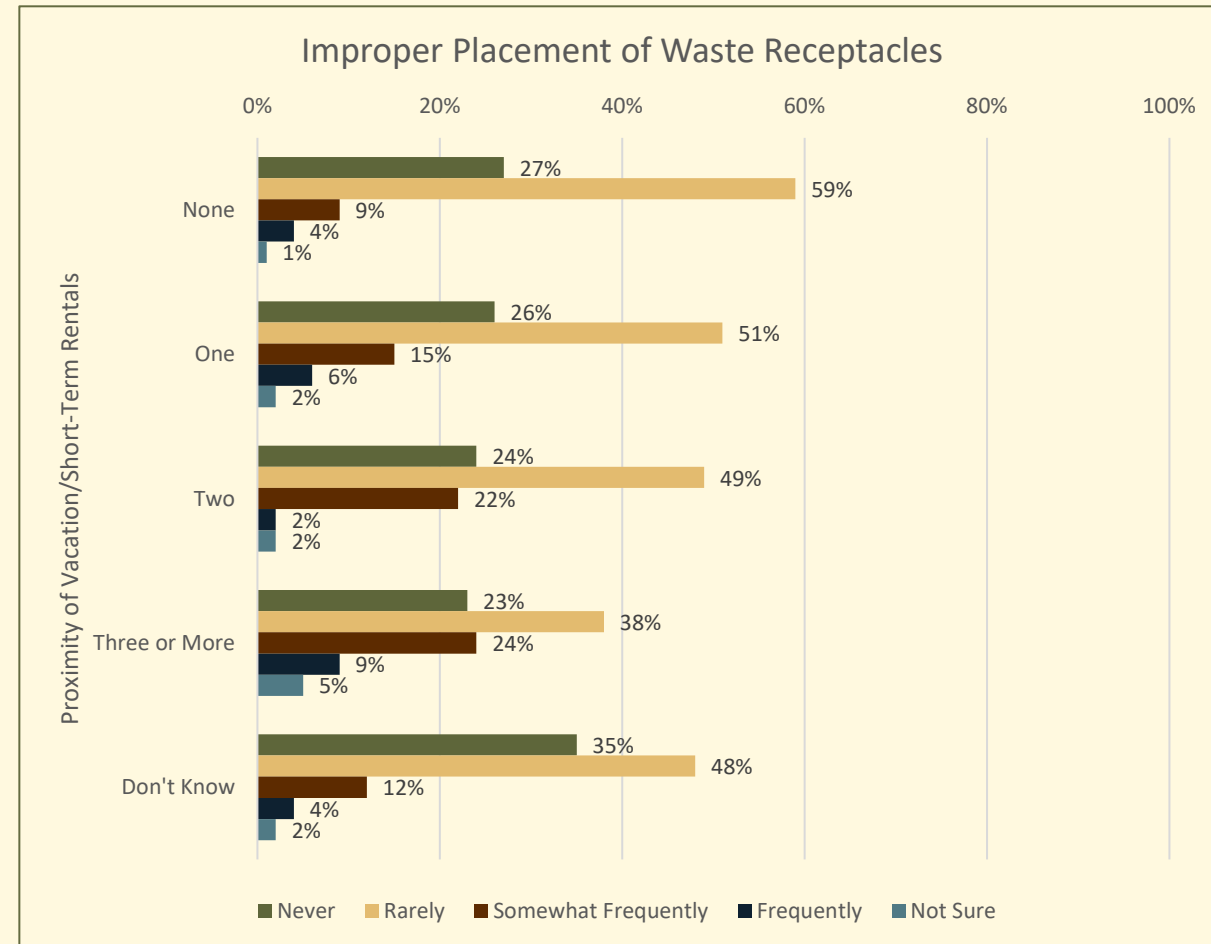


Observed Issues within Your Neighborhood

Single-Family Neighborhood Respondents

Survey Findings:

- A majority of single-family neighborhood respondents responded that they never or rarely observed an issue with the improper placement of waste receptacles.
- 23% or more of all single-family neighborhood respondents, **regardless of vacation/short-term rental choice**, reported never having an issue with the improper placement of waste receptacles.
- Of those that identified vacation/short-term rentals, frequency tended to increase with the number of identified vacation/short-term rentals.
- The largest percentage of frequency was seen by single-family respondents identifying three or more vacation/short-term rental properties within their proximity, at 33% (24% *somewhat frequently*, 9% *frequently*).



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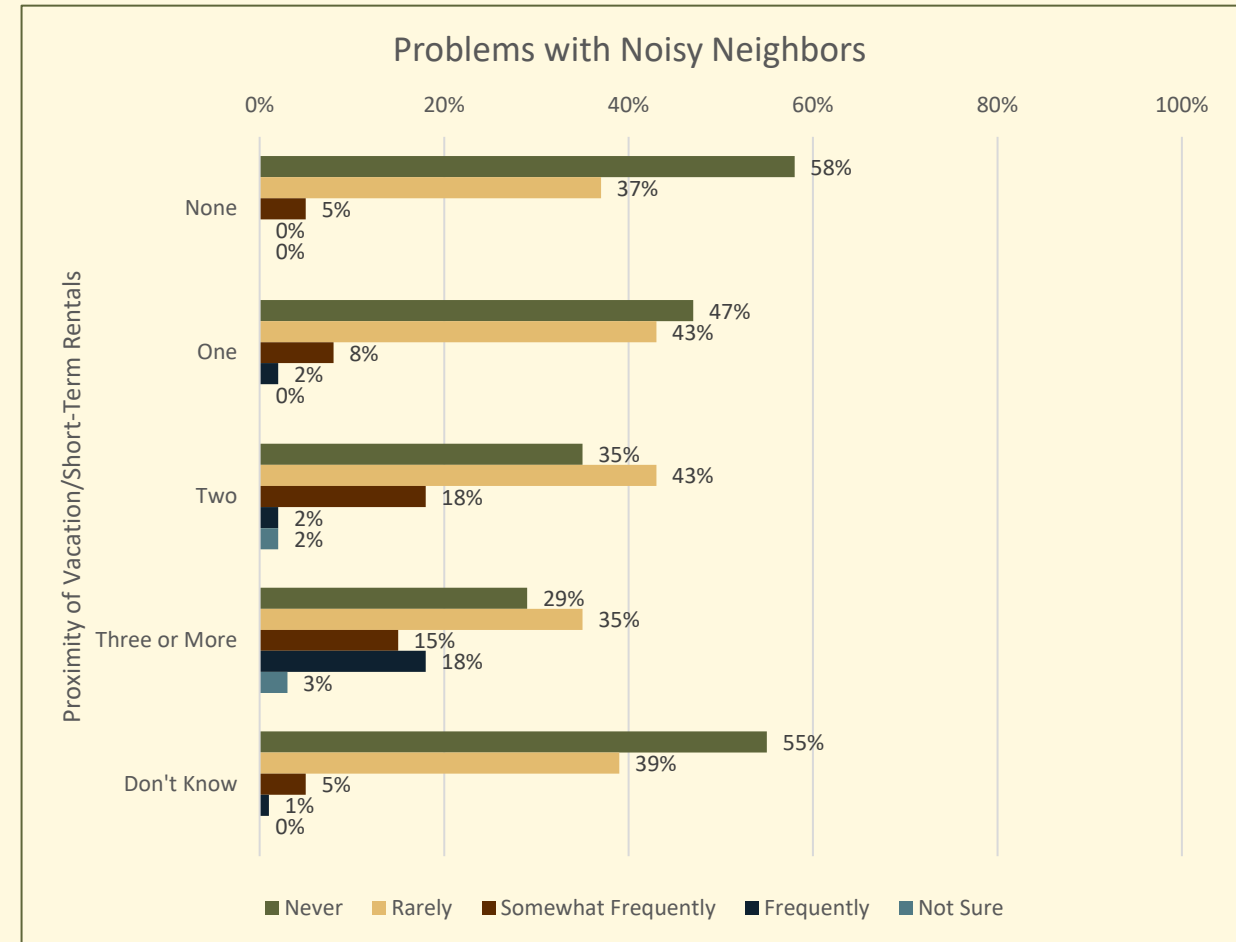


Observed Issues within Your Neighborhood

Single-Family Neighborhood Respondents

Survey Findings:

- Of those respondents who identified vacation/short-term rentals within their proximity, **overall frequency of problems with noisy neighbors increased as the number of vacation/short-term rentals increased.**
- A majority of respondents choosing no vacation/short-term rentals, or were not sure, reported never having an issue with noisy neighbors.
- Of those respondents who identified vacation/short-term rentals within their proximity, choices of *never* **significantly decreased** from 58% (none) to 29% (three or more).



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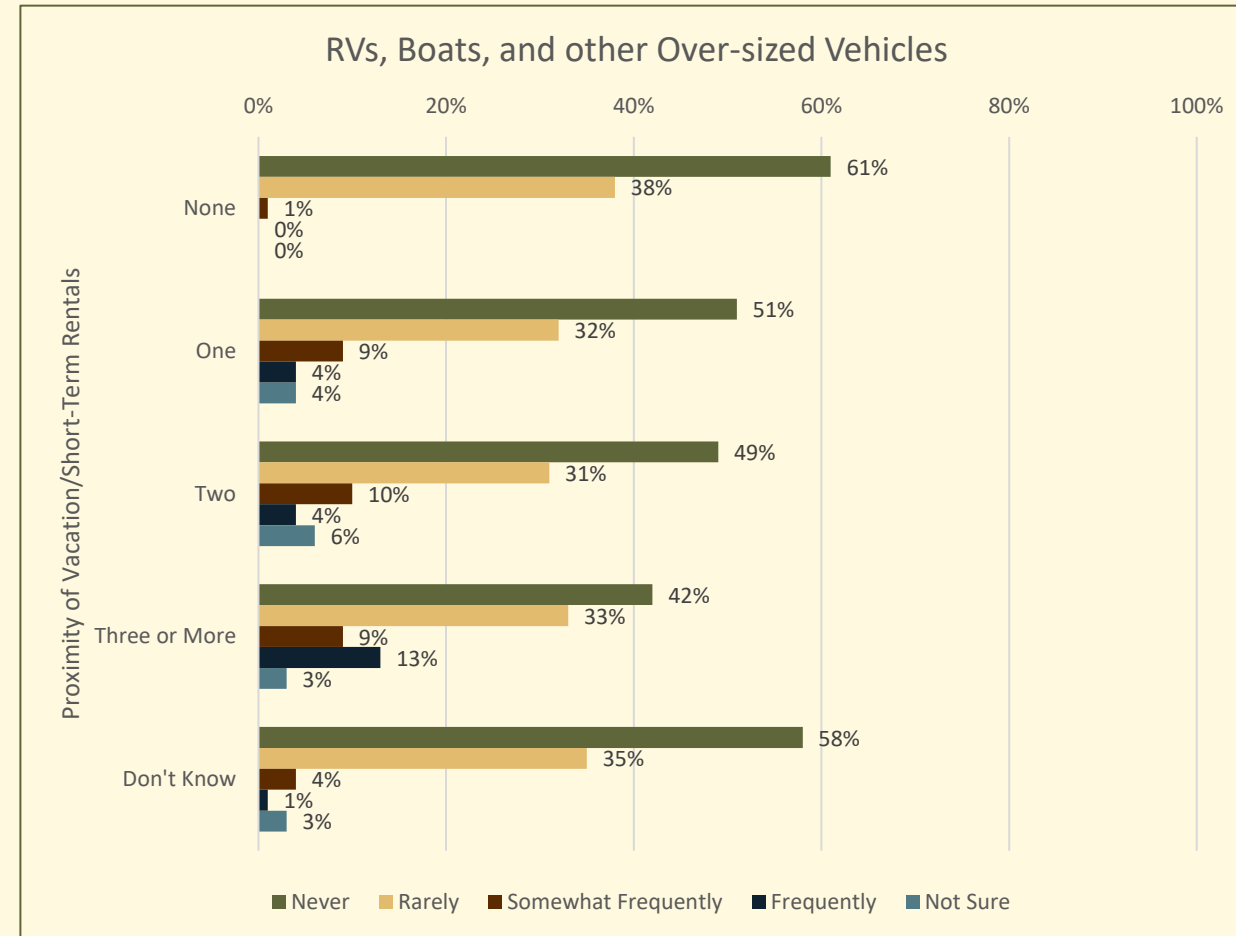


Observed Issues within Your Neighborhood

Single-Family Neighborhood Respondents

Survey Findings:

- 22% of respondents who chose three or more vacation/short-term rentals within their proximity reported observing the issue of over-sized vehicles **AT LEAST somewhat frequently**, as compared to 1% for those reporting no vacation/short-term rentals.
- Four of the five short-term rental categories received approximately 50% or more responses of *never* to the observed issue of over-sized vehicles. **The one exception: respondents reporting three or more vacation/short-term rentals at 42%.**
- As the number of observed vacation/short-term rentals within proximity increases from none to three or more, reported frequency percentages generally shift from *never* to *somewhat frequently* and *frequently*.



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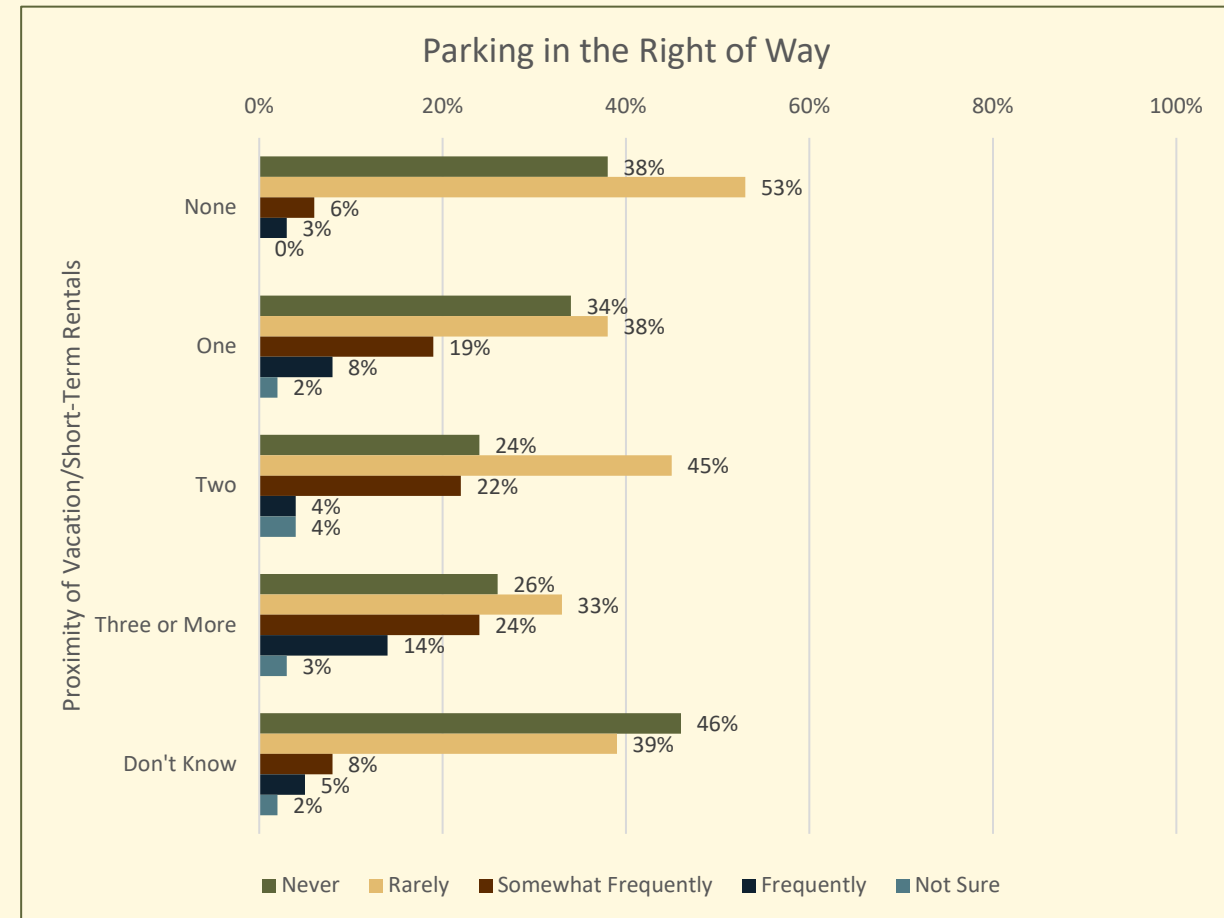


Observed Issues within Your Neighborhood

Single-Family Neighborhood Respondents

Survey Findings:

- A majority of respondents in all categories reported *never* or *rarely* observing an issue with parking in the right of way.
- 9% of respondents who identified no vacation/short-term rentals selected **AT LEAST somewhat frequently** for parking in the right of way, **significantly lower** compared to 21% for one rental, 26% for two rentals, and 38% for three or more rentals.
- Reported problems with parking in the right of way were **significantly more frequent** for respondents who reported at least one vacation/short-term rental in proximity to their home than those who reported none.
- Reported problems with parking in the right of way were less substantial when comparing between respondents who reported one, two, or three or more vacation/short-term rentals.



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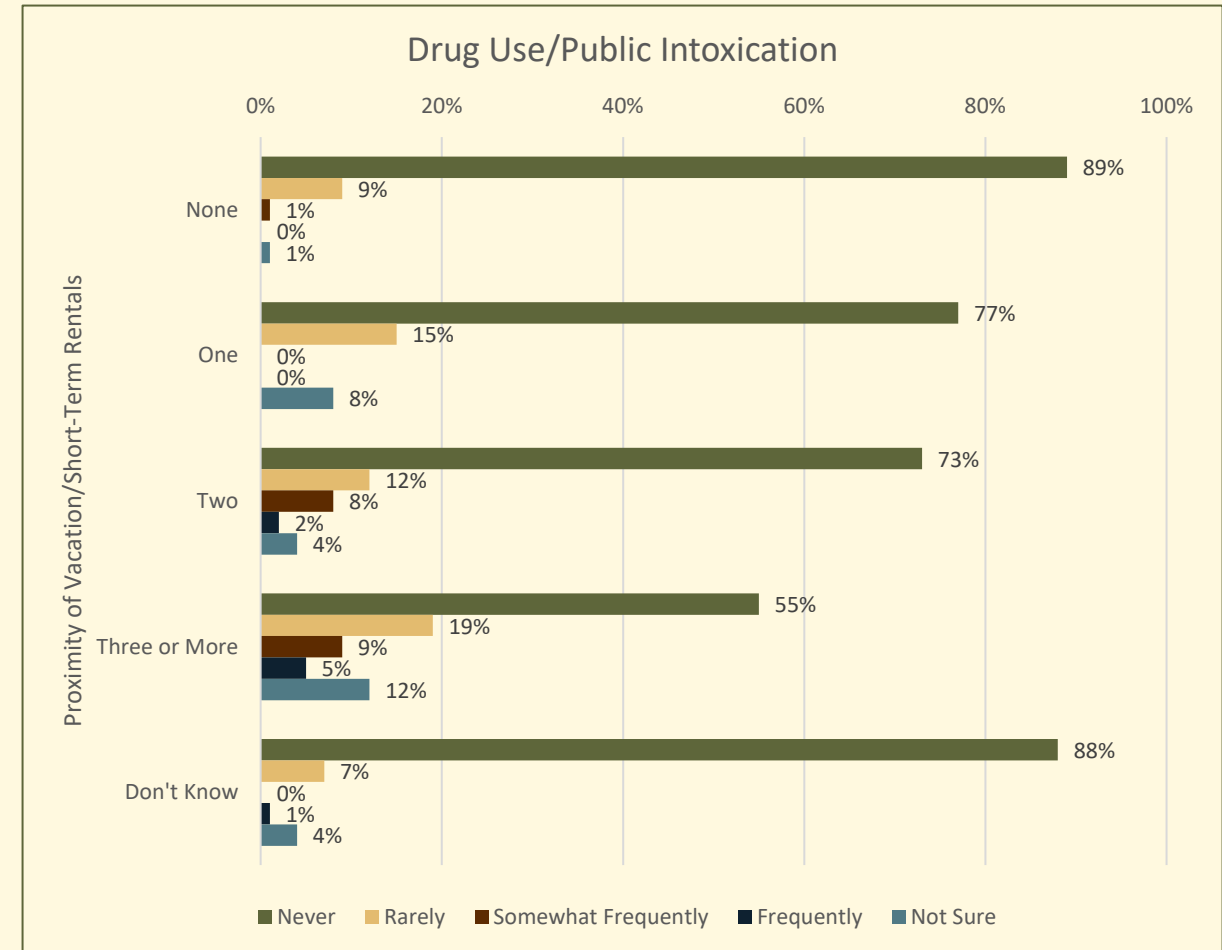


Observed Issues within Your Neighborhood

Single-Family Neighborhood Respondents

Survey Findings:

- Reported observed issues with drug use and public intoxication were nearly non-existent for respondents who reported no vacation/short-term rentals in proximity to their home: 89% reported *never*, 9% reported *rarely*.
- Reported problems were more frequent for respondents who report two or three or more vacation/short-term rentals in proximity to their home, compared to those reporting none:
 - None – 1% *somewhat frequent* or *frequent*
 - Two – 10% *somewhat frequent* or *frequent*
 - Three of more – 14% *somewhat frequent* or *frequent*



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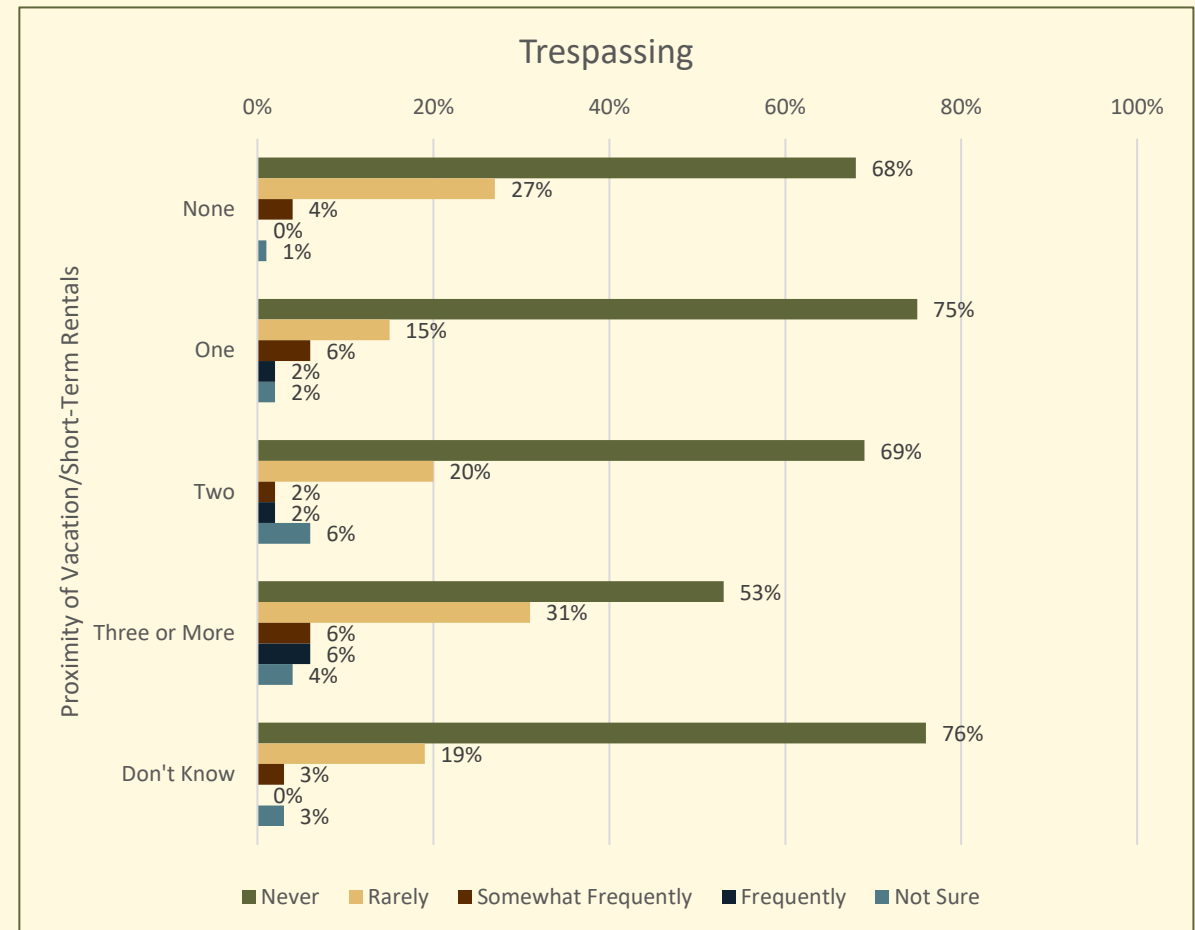


Observed Issues within Your Neighborhood

Single-Family Neighborhood Respondents

Survey Findings:

- Overall, trespassing was less of an observable issue compared to the previous problems.
- Over 80% of all single-family neighborhood respondents stated they never or rarely observed trespassing.
- 12% of single-family neighborhood respondents who identified three or more vacation/short-term rental properties within proximity of their property stated they observed trespassing somewhat frequently (6%) or frequently (6%), the highest percentage across vacation/short-term rental categories.
- Observed trespassing responses generally migrate from *never* to *rarely* as the number of identified vacation/short-term rentals increases.



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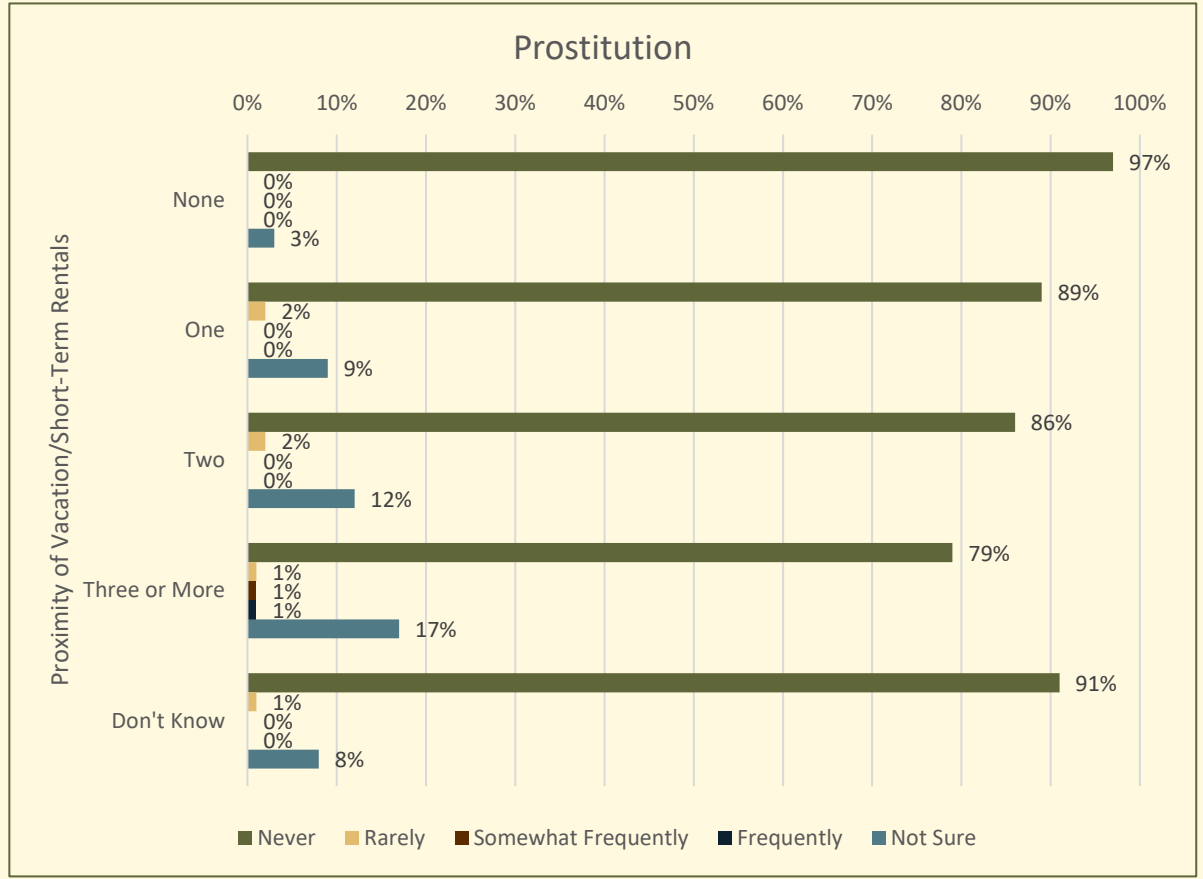


Observed Issues within Your Neighborhood

Single-Family Neighborhood Respondents

Survey Findings:

- Prostitution was not identified to be a **significant** problem, regardless of the proximity of vacation/short-term rentals.



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Questions and Comments