



# 2022 Village of Pinehurst Business Survey Findings Report

Presented to the Village of Pinehurst,  
North Carolina

November 2022



# Contents

<b>Executive Summary .....</b>	<b>i</b>
<b>Section 1: Charts and Graphs.....</b>	<b>1</b>
<b>Section 2: Importance-Satisfaction Analysis.....</b>	<b>47</b>
<b>Section 3: Tabular Data .....</b>	<b>53</b>
<b>Section 4: Survey Instrument.....</b>	<b>87</b>



# Executive Summary

# 2022 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 fall of 2022. The survey was administered for the tenth 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 five-page survey and cover letter were mailed to 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, text messages, 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).

# 2022 Village of Pinehurst Business Survey

## Executive Summary



### Major Findings

**Use of Village Services.** The Village services that the highest percentage of businesses have used in the past year were: fire inspections (63%), police patrol (47%), police emergency response (33%), and building inspections (28%).

**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%), building inspections (95%), police emergency response (92%), and fire inspections (91%).

**Most Important Village Services.** Based on the sum of their top three choices, the areas that businesses rated as most important were: 1) fire emergency response (51%), 2) police patrol (49%), and 3) police emergency response (45%).

**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; 39% feel the overall quality of Village services is higher or significantly higher than their expectations. Only 9% feel the overall quality of Village services is below their expectations.

**Satisfaction with Various Village Services.** Eighty-three percent (83%) of the businesses surveyed who had an opinion indicated that they were satisfied with the landscape and maintenance in rights-of-way and public areas; 83% were satisfied with the cleanliness of streets and public areas, and 75% were satisfied with the condition of sidewalks.

**Perceptions of the Village.** Ninety-six percent (96%) of the businesses surveyed who had an opinion indicated that they were satisfied with the overall feeling of safety in the Village; 89% were satisfied with the overall quality of life, and 88% were satisfied with the overall appearance of the Village.

**Likelihood of Recommending the Village as a Business Location.** Seventy-four percent (74%) of businesses would be very likely or likely to recommend the Village as a business location to friends, family and co-workers; 15% would be somewhat likely to recommend the Village as a business location, and 12% would not be likely to recommend the Village as a business location to friends, family and co-workers.

**Business Atmosphere Compared to Two Years Ago.** Forty-three percent (43%) of businesses feel the overall business atmosphere in the Village is better than two years ago; 31% feel there has been no change, but the atmosphere is good; 5% feel there has been no change, but the atmosphere is poor, and 7% feel the atmosphere is worse.

**Village Customer Service.** Seventy-two percent (72%) of businesses rated the customer service from the Village as very good or good, compared to only 5% rated the customer service from the Village as poor.

# 2022 Village of Pinehurst Business Survey

## Executive Summary



**Level of Agreement with Statements About Customer Service from Village Staff.** Eighty-four percent (84%) of the businesses surveyed who had an opinion agreed that the Village staff was courteous during their most recent interaction with them; 72% also agreed that Village staff was competent, 66% agreed that the staff was responsive to their needs, and 66% agreed that their issue was resolved promptly.

**Satisfaction with Village Communications with Businesses.** Fifty-one percent (51%) of businesses were satisfied with the job the Village does communicating with business owners, compared to 14% who were dissatisfied.

**Village Website.** Of the 56% of business that visited the Village’s website ([www.vopnc.org](http://www.vopnc.org)) during the past 12 months, 64% who had an opinion felt the website was easy to navigate, and 63% rated the availability of information on Village services on the website as “very good” or “good.” Overall, 62% of those who have visited the Village’s website indicated they were either “very satisfied” or “satisfied” with the website.

**Village Mobile App.** Thirteen percent (13%) of businesses indicated they used the Village’s mobile app (MY VOP) during the past 12 months; 60% of those who have used it indicated they were “very satisfied” or “satisfied.”

**Best Ways to Communicate with Businesses.** Sixty-one percent (61%) of businesses indicated that email is one of the best ways for the Village to communicate with them.

**Community Development (Codes and Ordinances).** Sixty-four percent (64%) of the businesses who had an opinion were satisfied with historic district guidelines; 49% were satisfied with zoning ordinances, and 47% were satisfied with business signage regulations.

**Impact of Various Cultural and Entertainment Opportunities.** Forty-six percent (46%) of the businesses surveyed feel Holly Arts & Crafts Festival in the Village Center has a positive impact on their business; 45% feel cultural activities have a positive impact; 44% feel parades have a positive impact on their business, and 40% feel tree lighting has a positive impact on their business.

**Satisfaction with the Way the Village handles Events That Attract Large Crowds.** Sixty-five percent (65%) of businesses are satisfied with the way the Village handles events that attract large crowds, compared to only 8% who are dissatisfied.

**Value of Village of Pinehurst Welcome Center.** Twenty-seven percent (27%) of businesses strongly agree or agree with the statement, “*The Village of Pinehurst Welcome Center brings added value to my business;*” 36% are neutral, 8% disagree with this statement, and 29% do not have an opinion.

# 2022 Village of Pinehurst Business Survey

## Executive Summary



**Reasons Influencing Decision to Locate Business in the Village of Pinehurst.** Eighty-six percent (86%) 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 (78%).

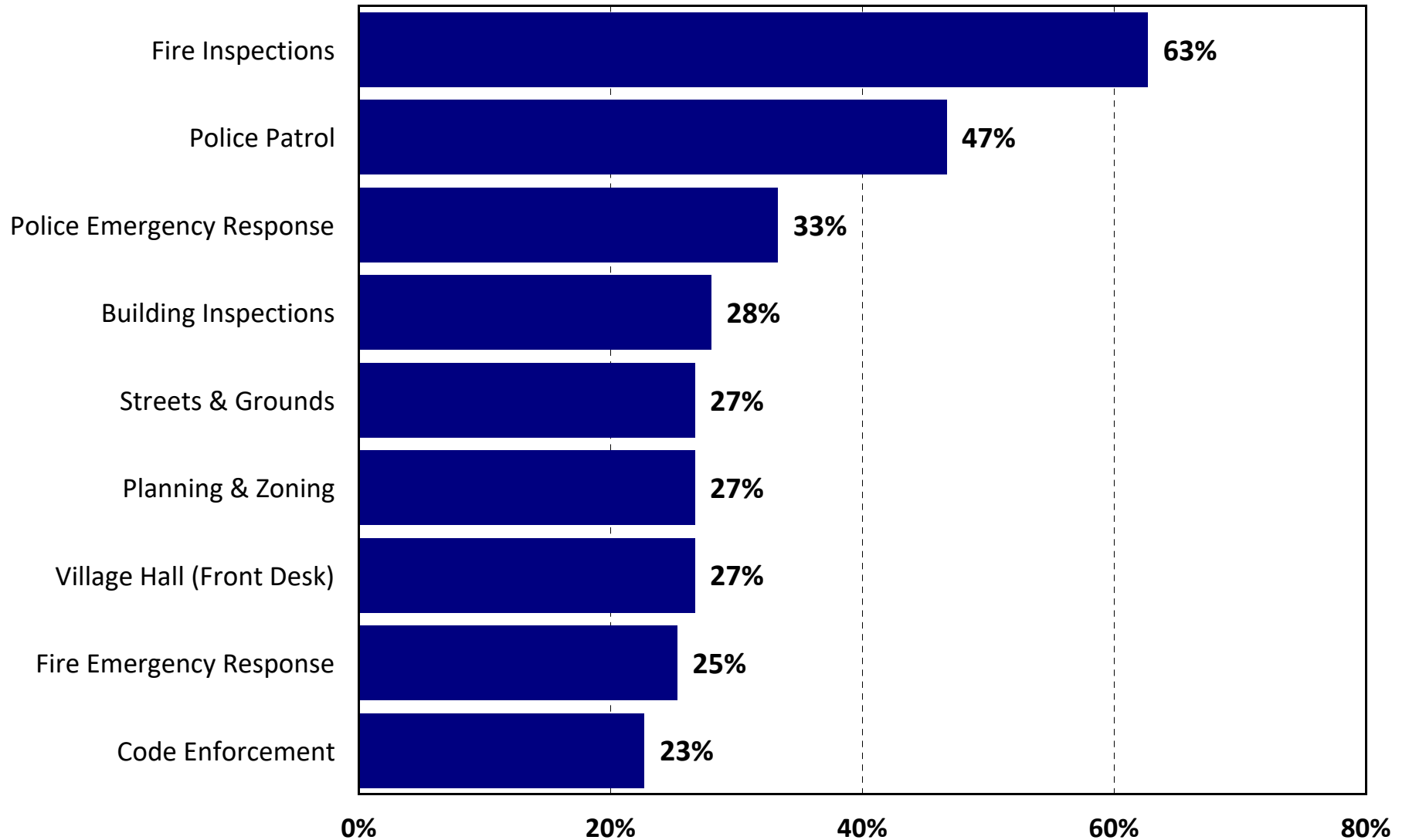


# 1 Charts and Graphs



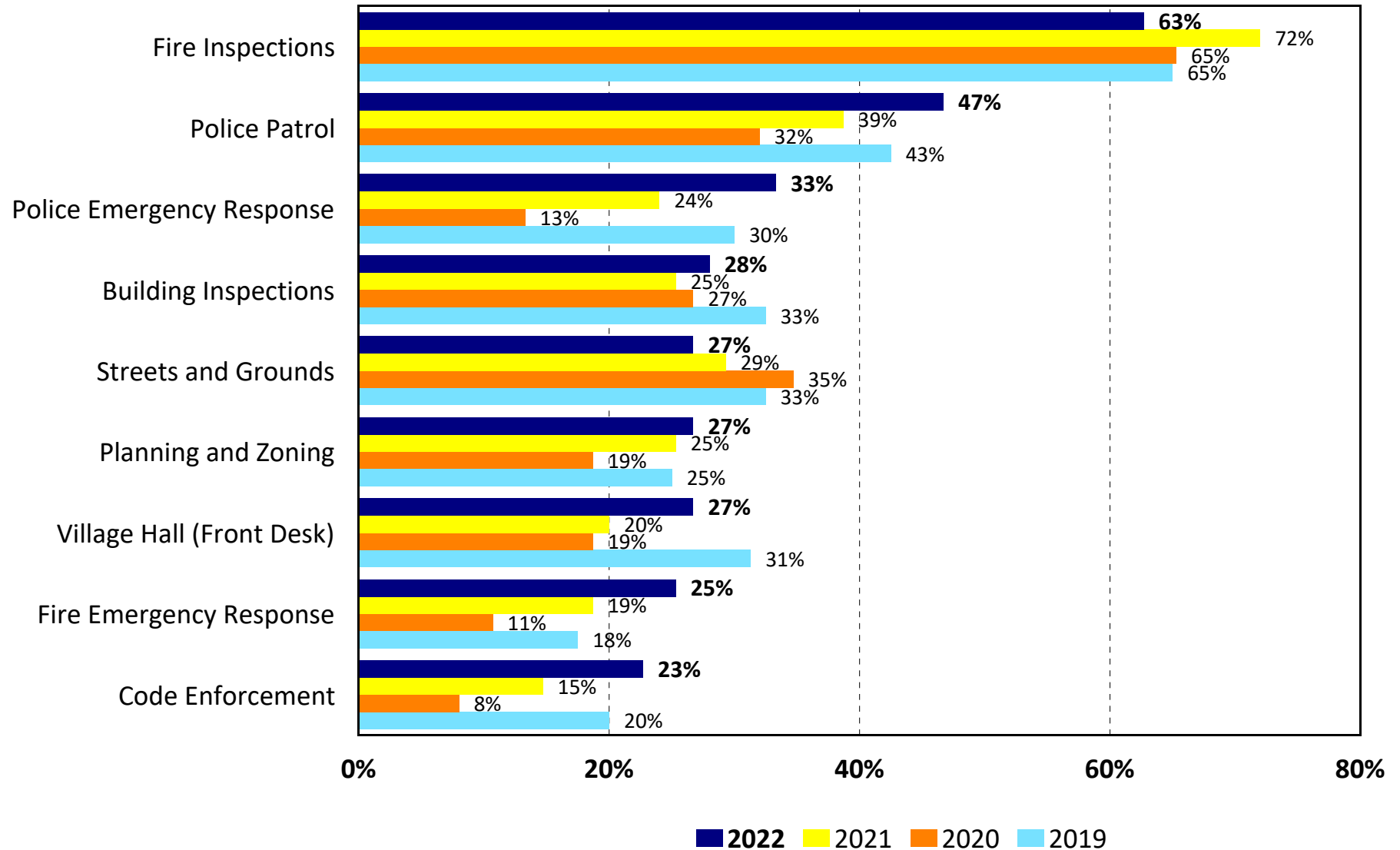
# Q1. Have you used this service or department in the past year?

by percentage of respondents who answered “yes”



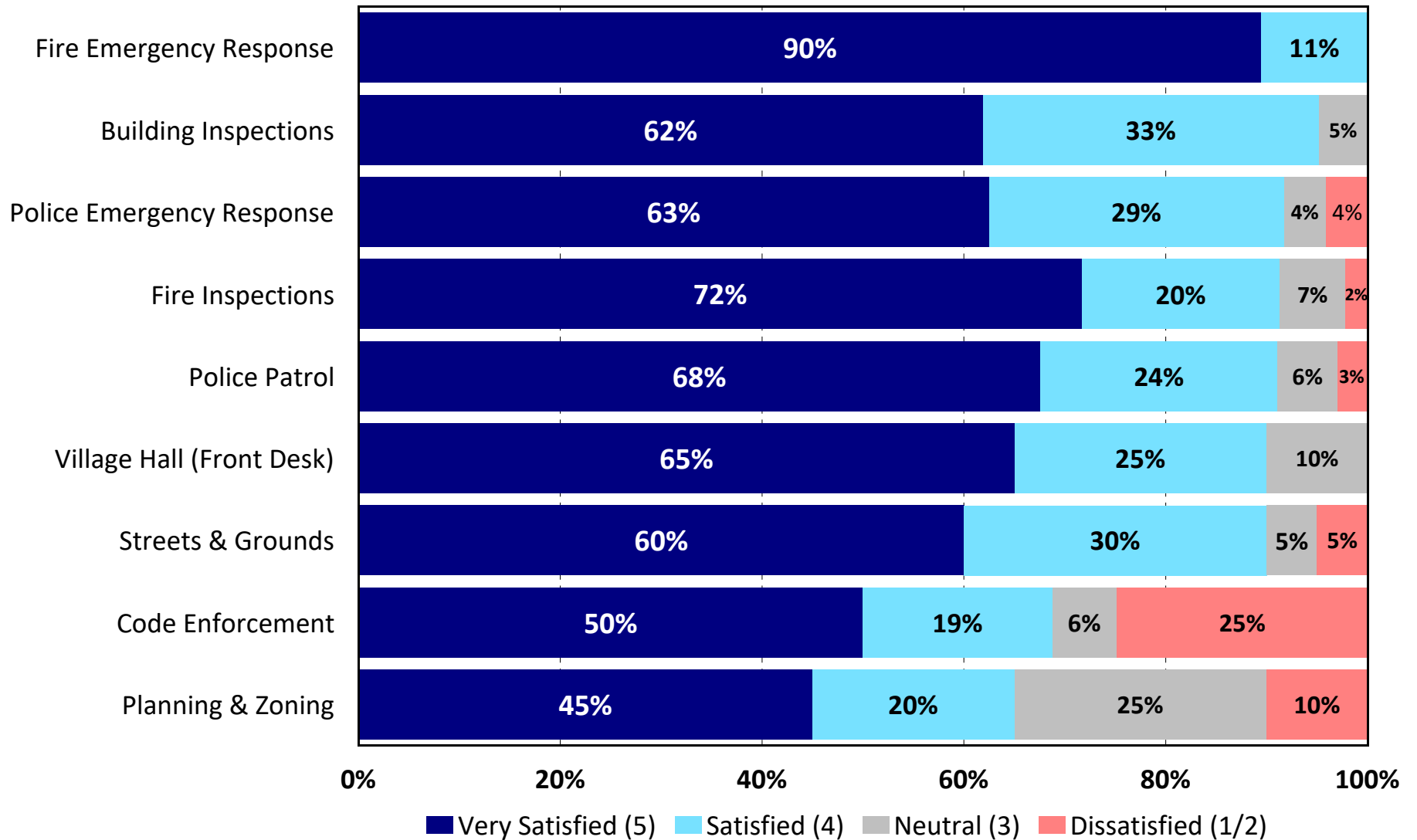
# Q1. Have you used this service or department in the past year? - 2019 to 2022

by percentage of respondents who answered "yes"



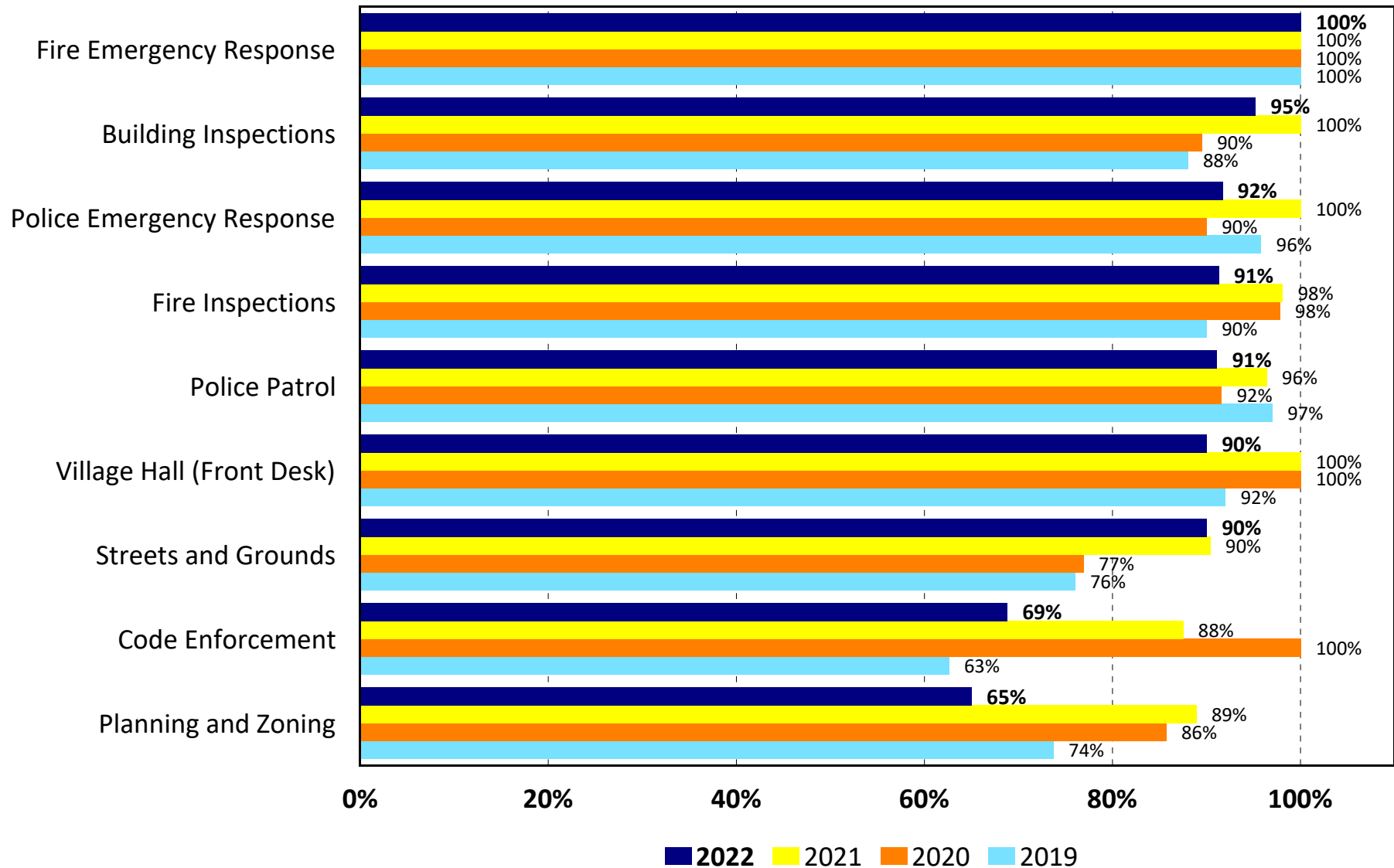
# Q1. Overall Satisfaction with Pinehurst Services or Departments Used in the Past Year

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")



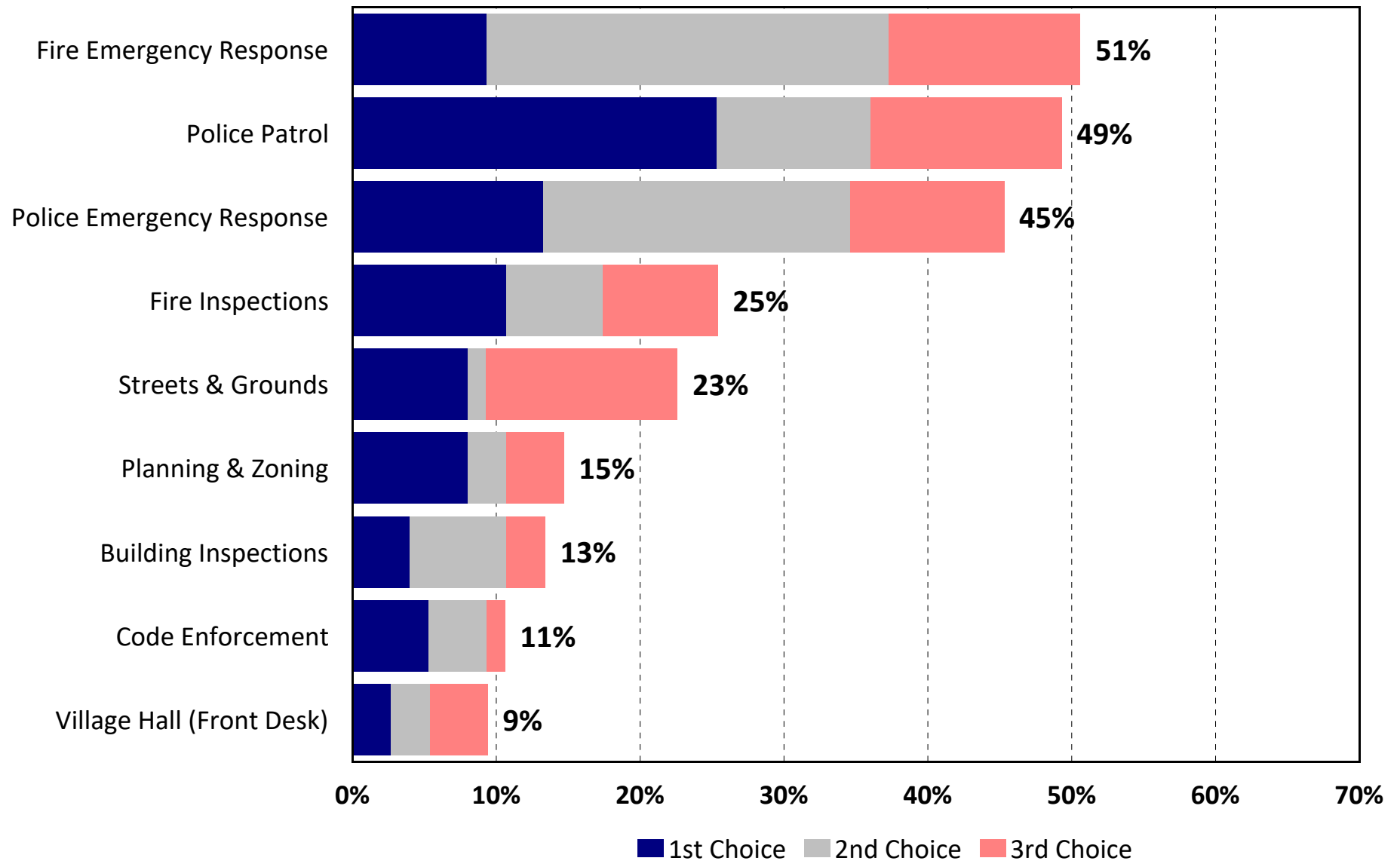
# Q1. Overall Satisfaction with Pinehurst Services or Departments Used in the Past Year - 2019 to 2022

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



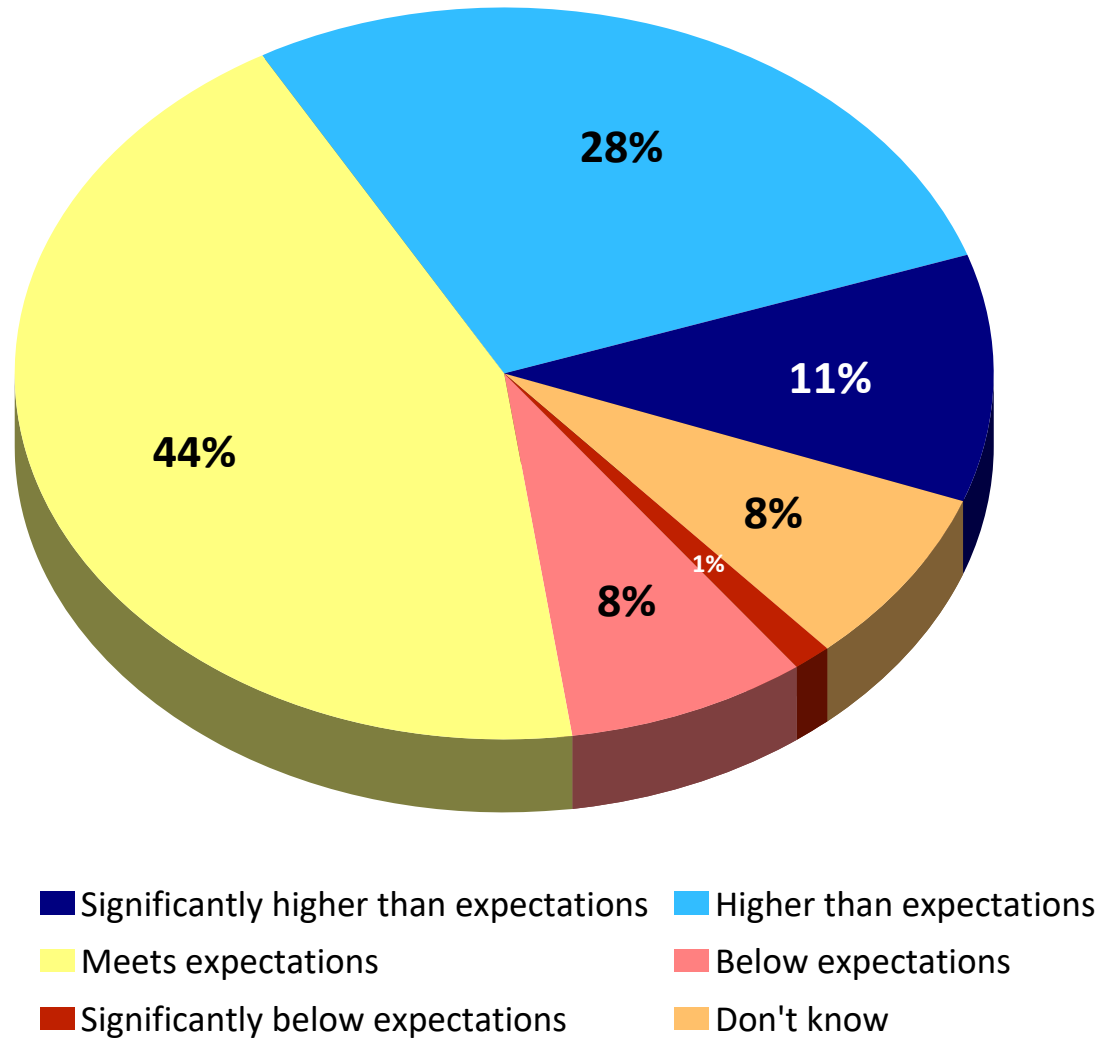
# Q2. Village Services or Departments Rated as the Most Important to Their Business

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

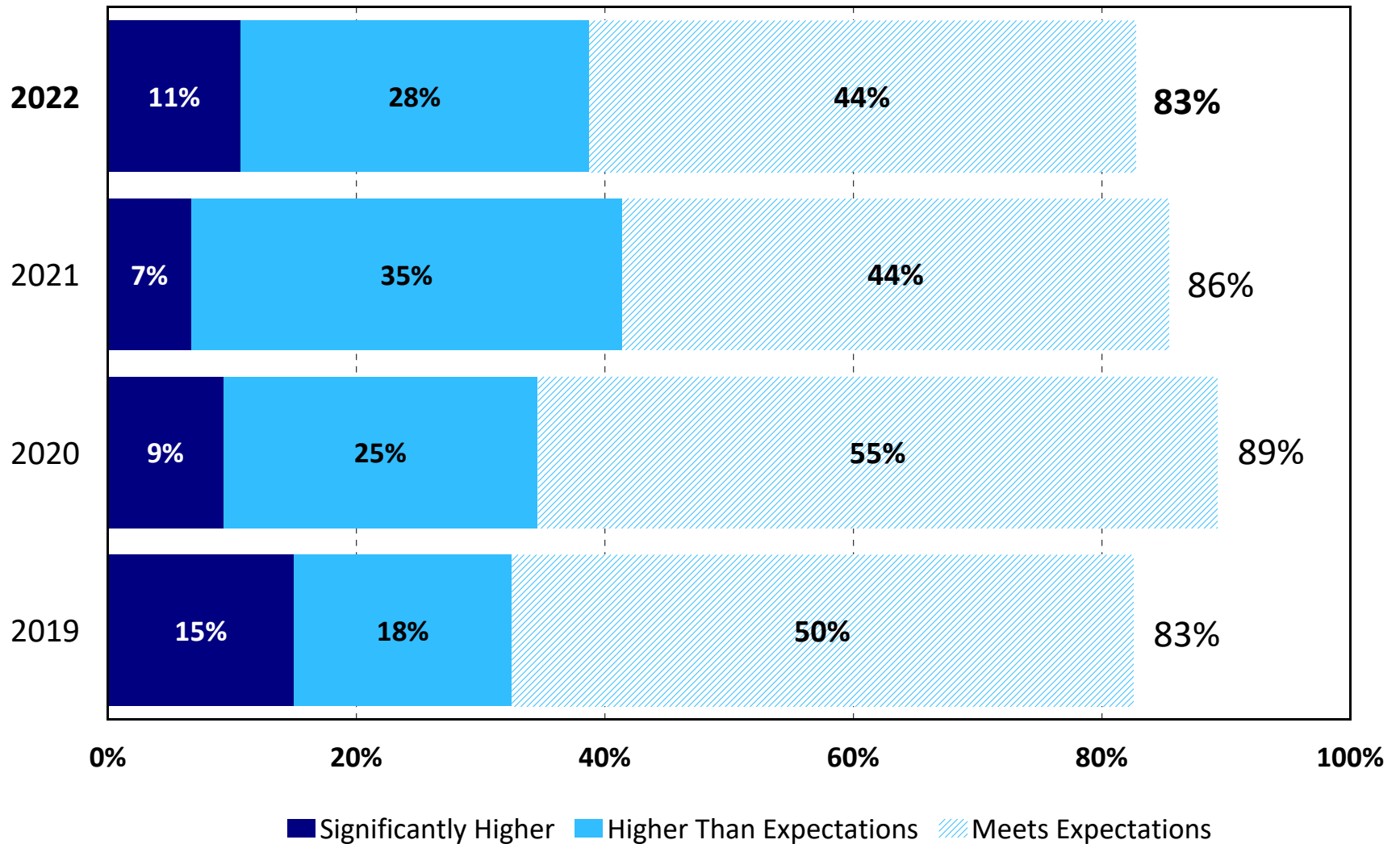
by percentage of respondents



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

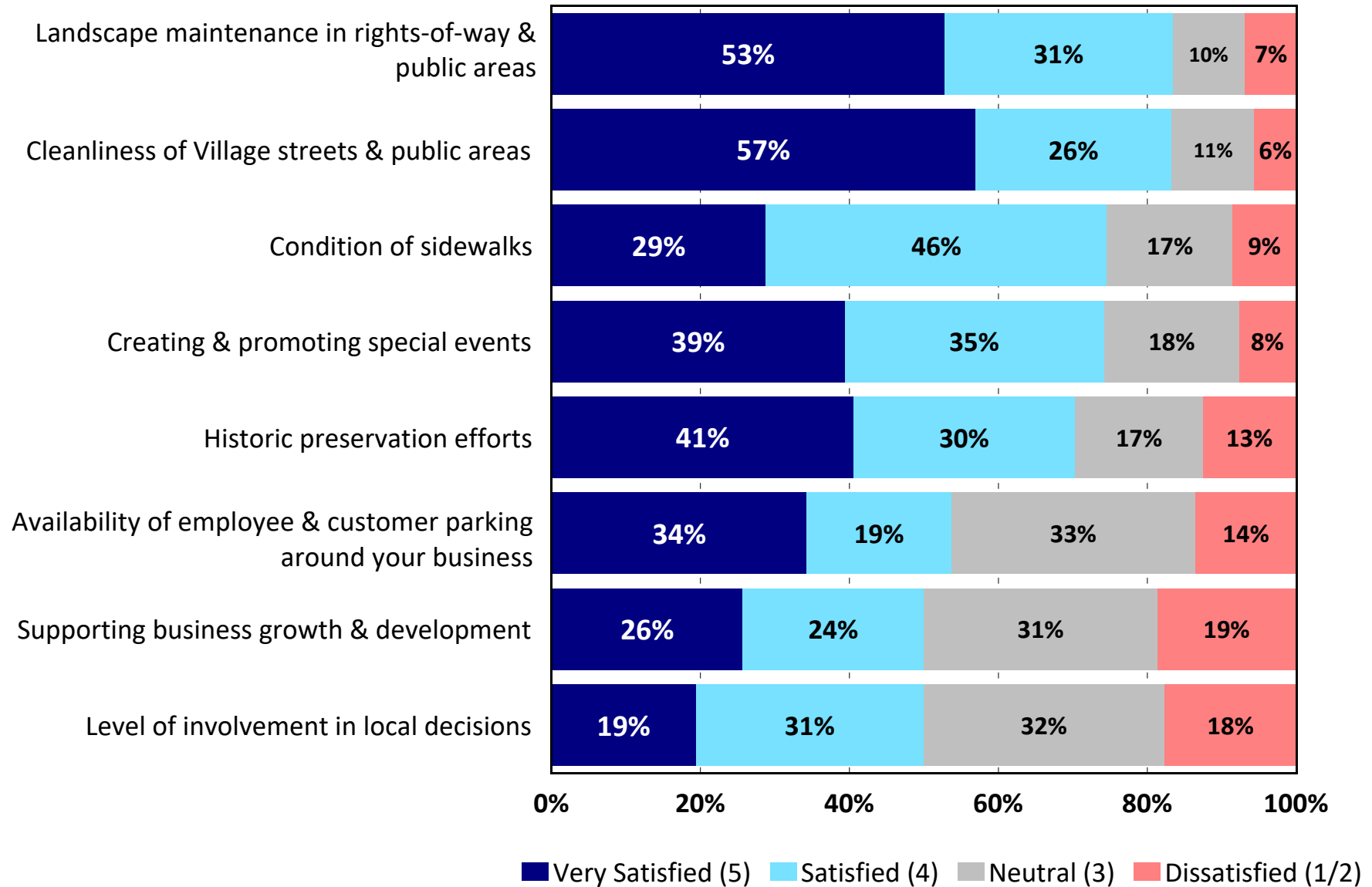
## 2019 to 2022

by percentage of respondents



# Q4. Level of Satisfaction with the Village in Various Areas

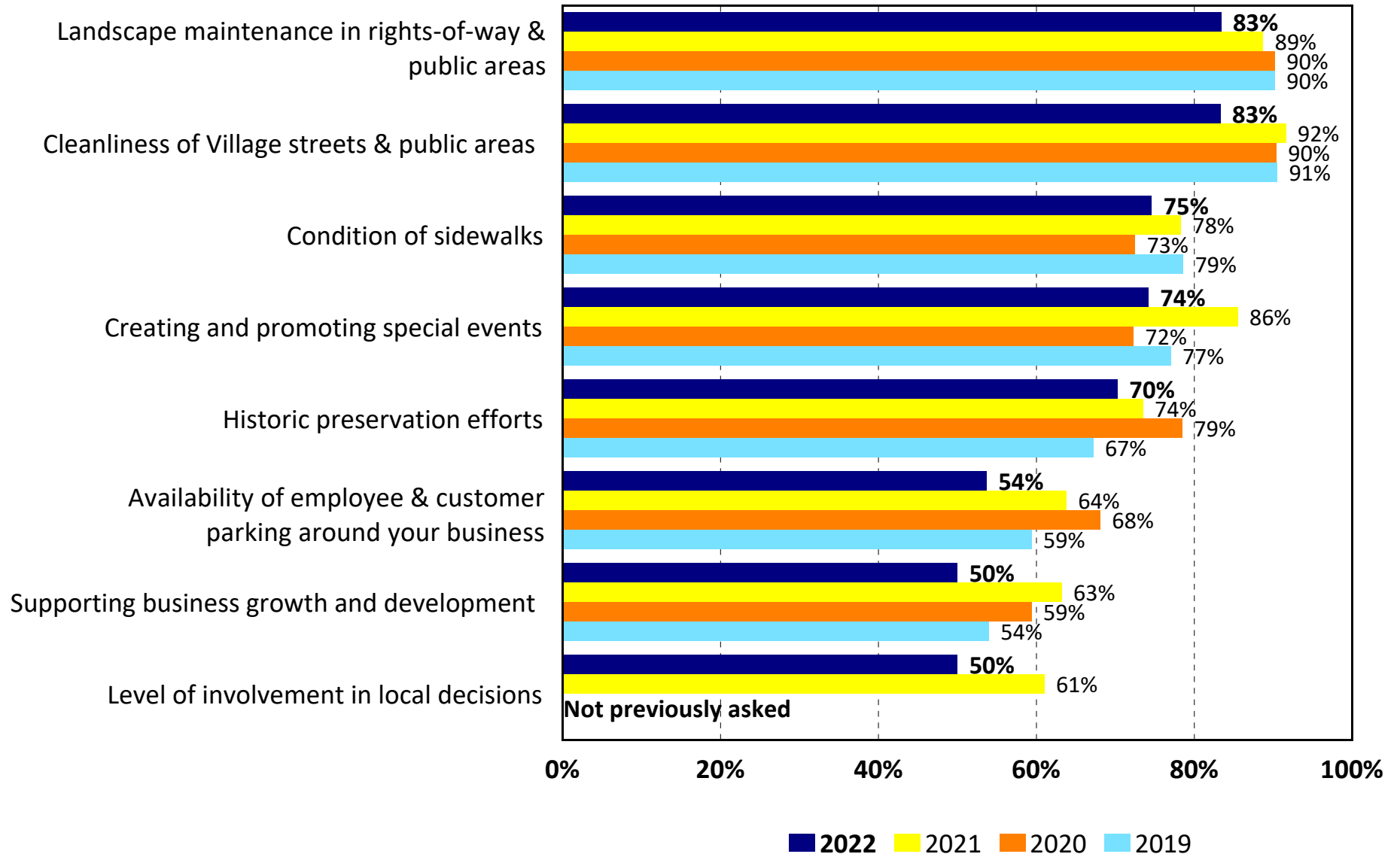
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding “don't know”)





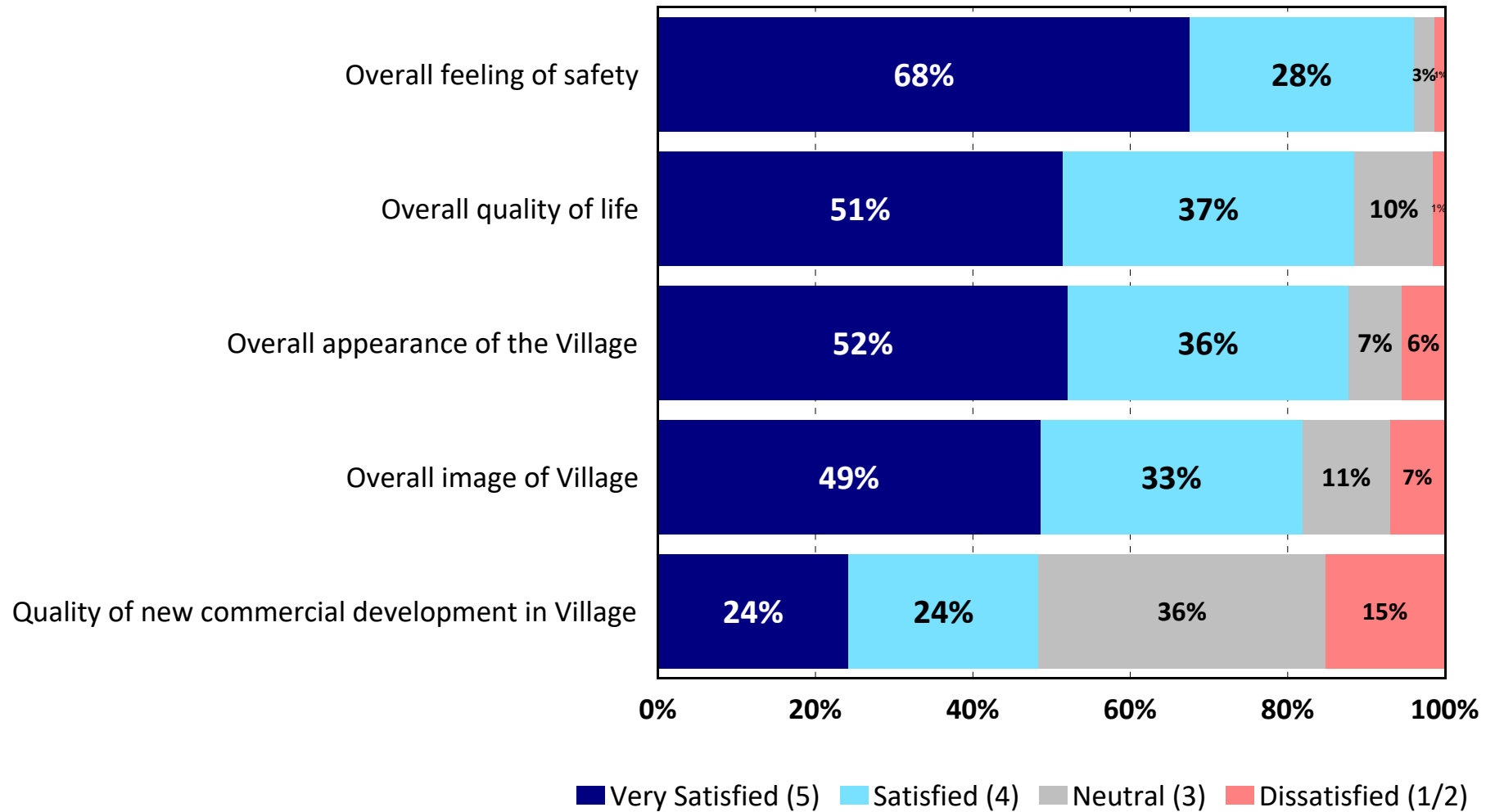
# Q4. Level of Satisfaction with the Village in Various Areas 2019 to 2022

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



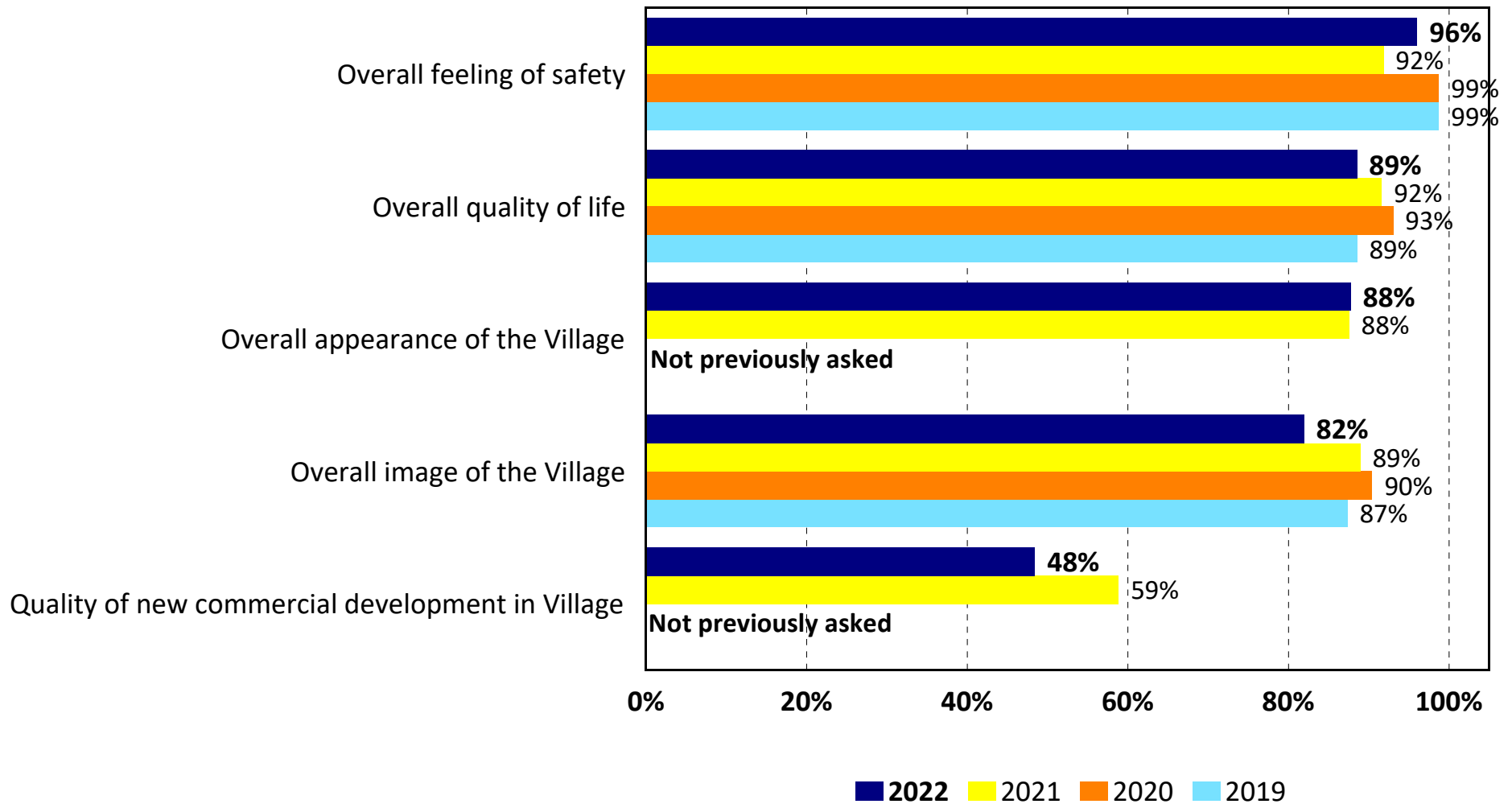
# Q5. Overall Satisfaction with Various Perceptions of the Village of Pinehurst

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



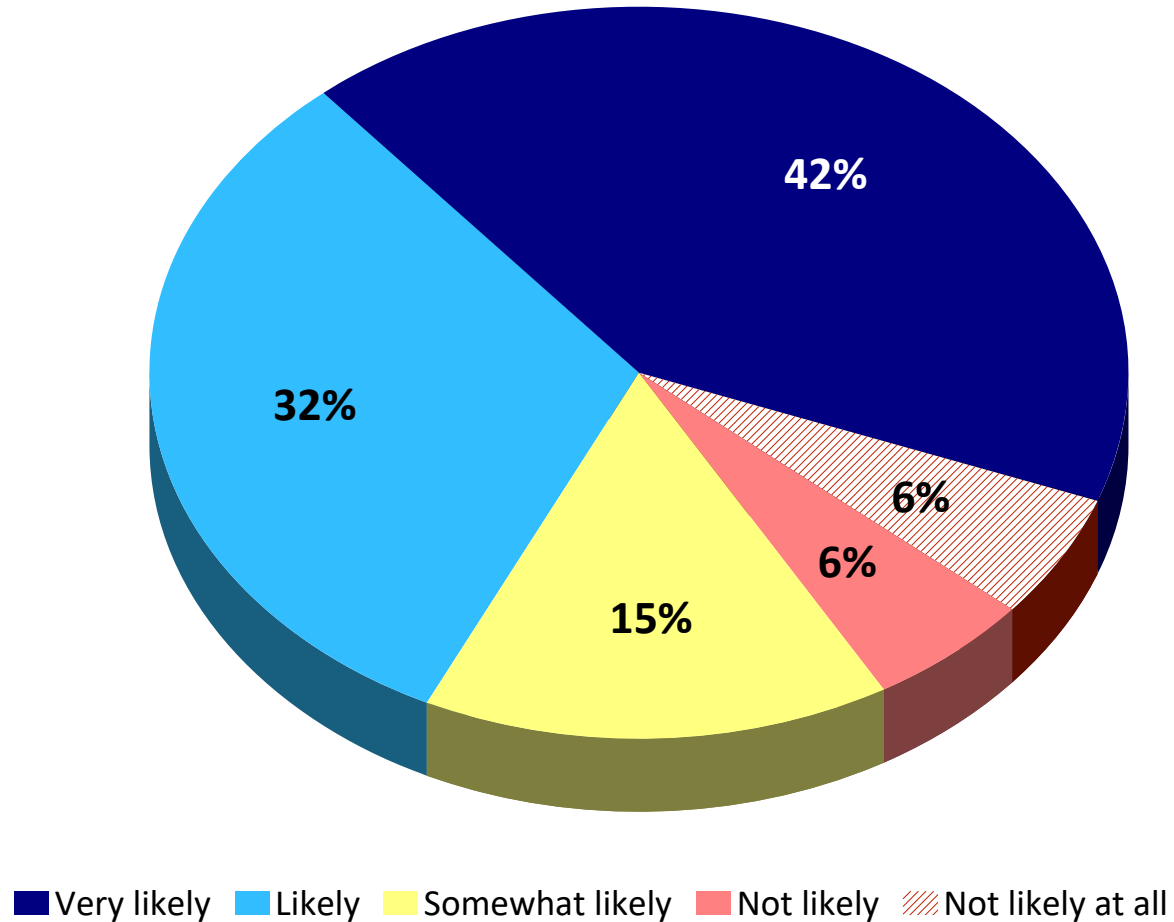
# Q5. Overall Satisfaction with Various Perceptions of the Village of Pinehurst - 2019 to 2022

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")



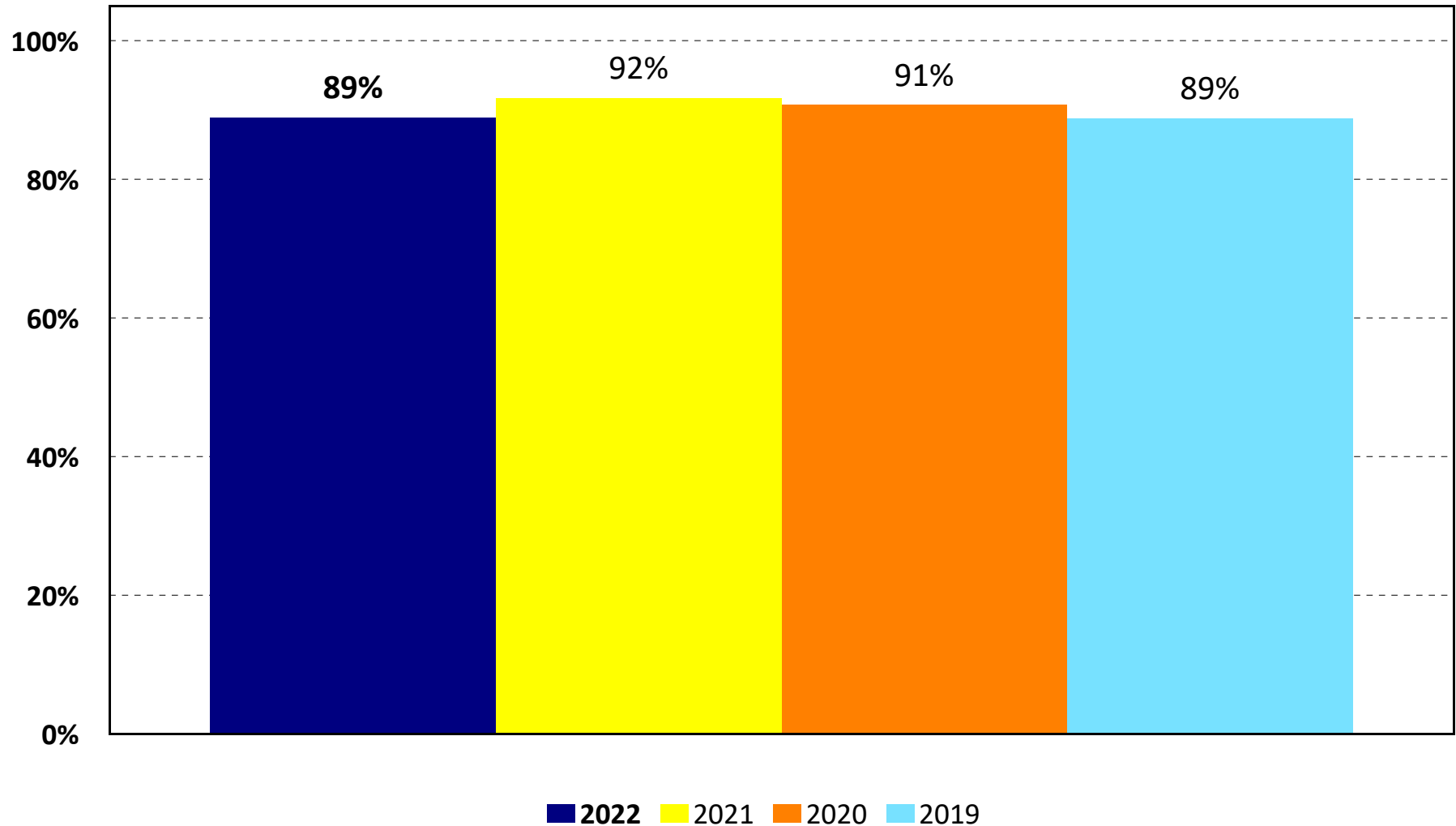
# Q6. How likely would you be to recommend the Village as a business location to friends, family, and co-workers?

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



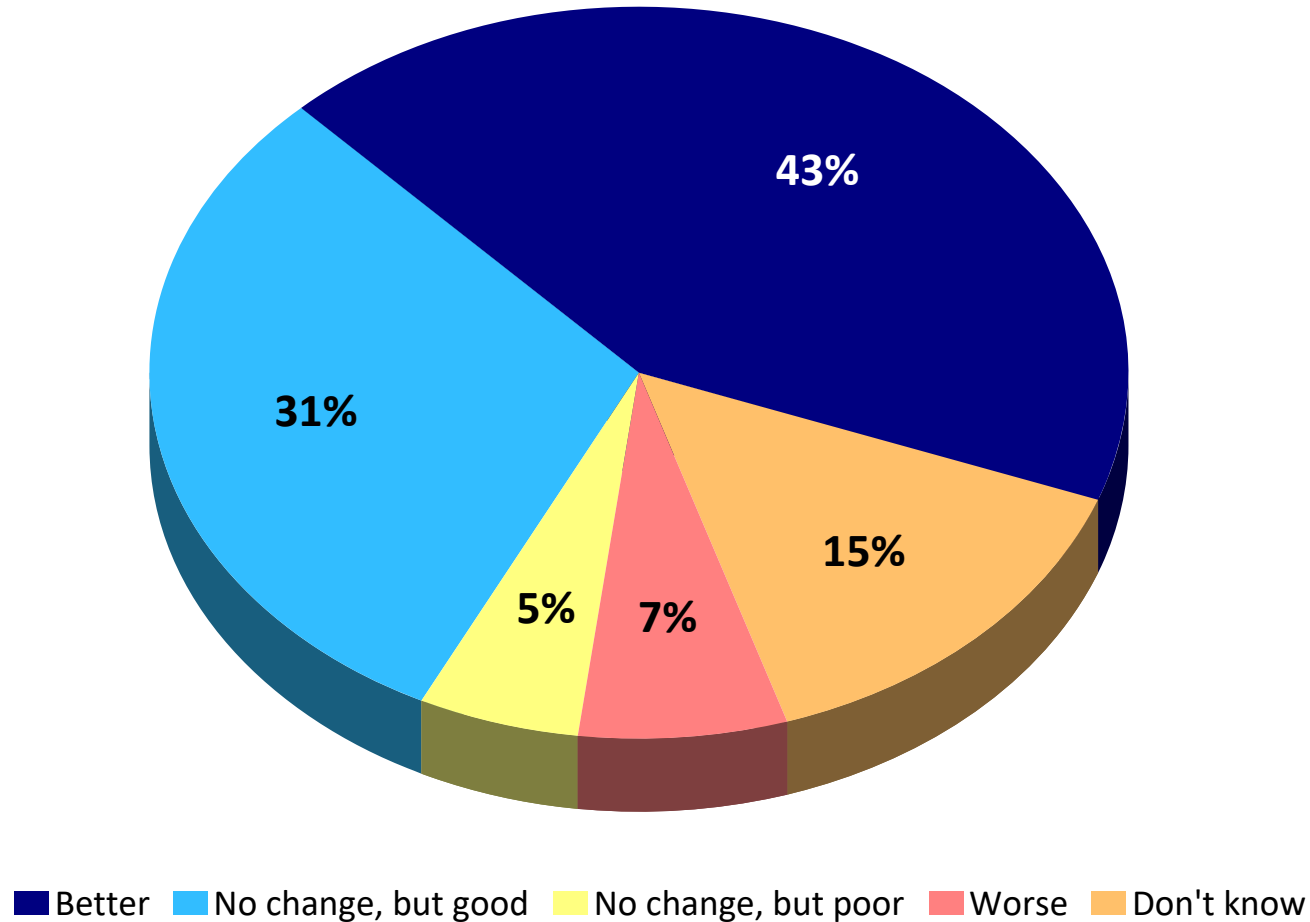
# Q6. How likely would you be to recommend the Village as a business location to friends, family, and co-workers? - 2019 to 2022

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?

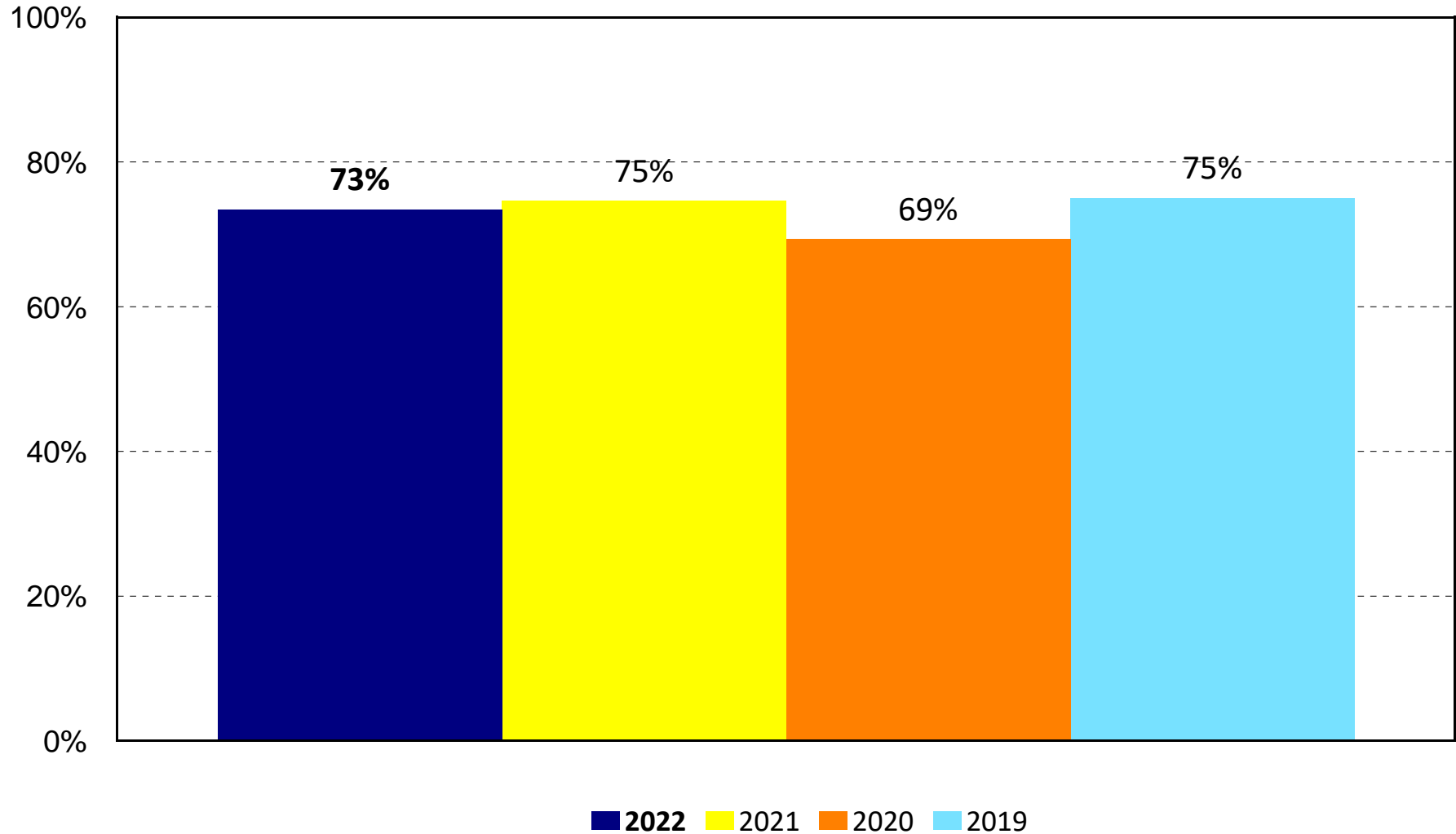
by percentage of respondents



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

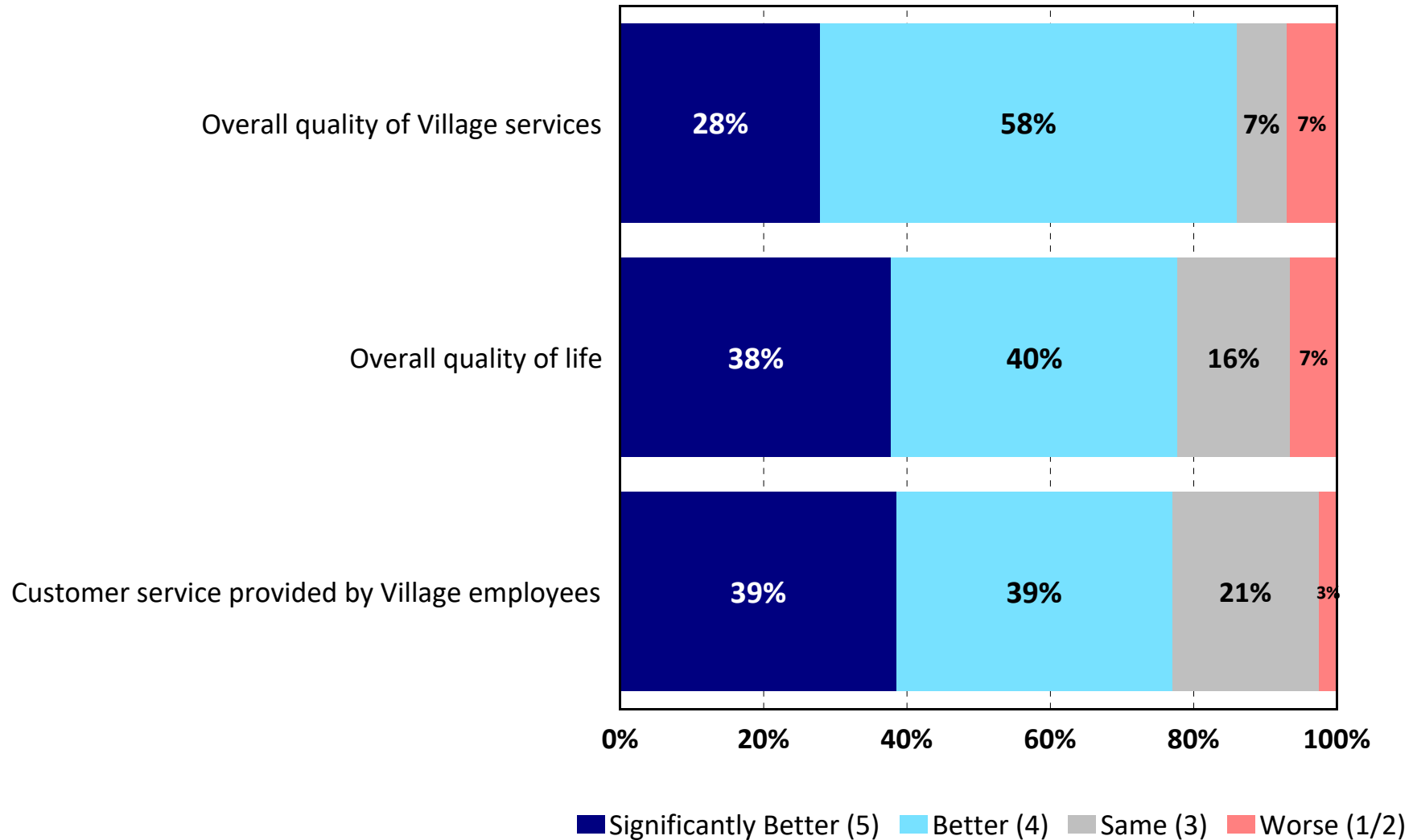
## 2019 to 2022

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

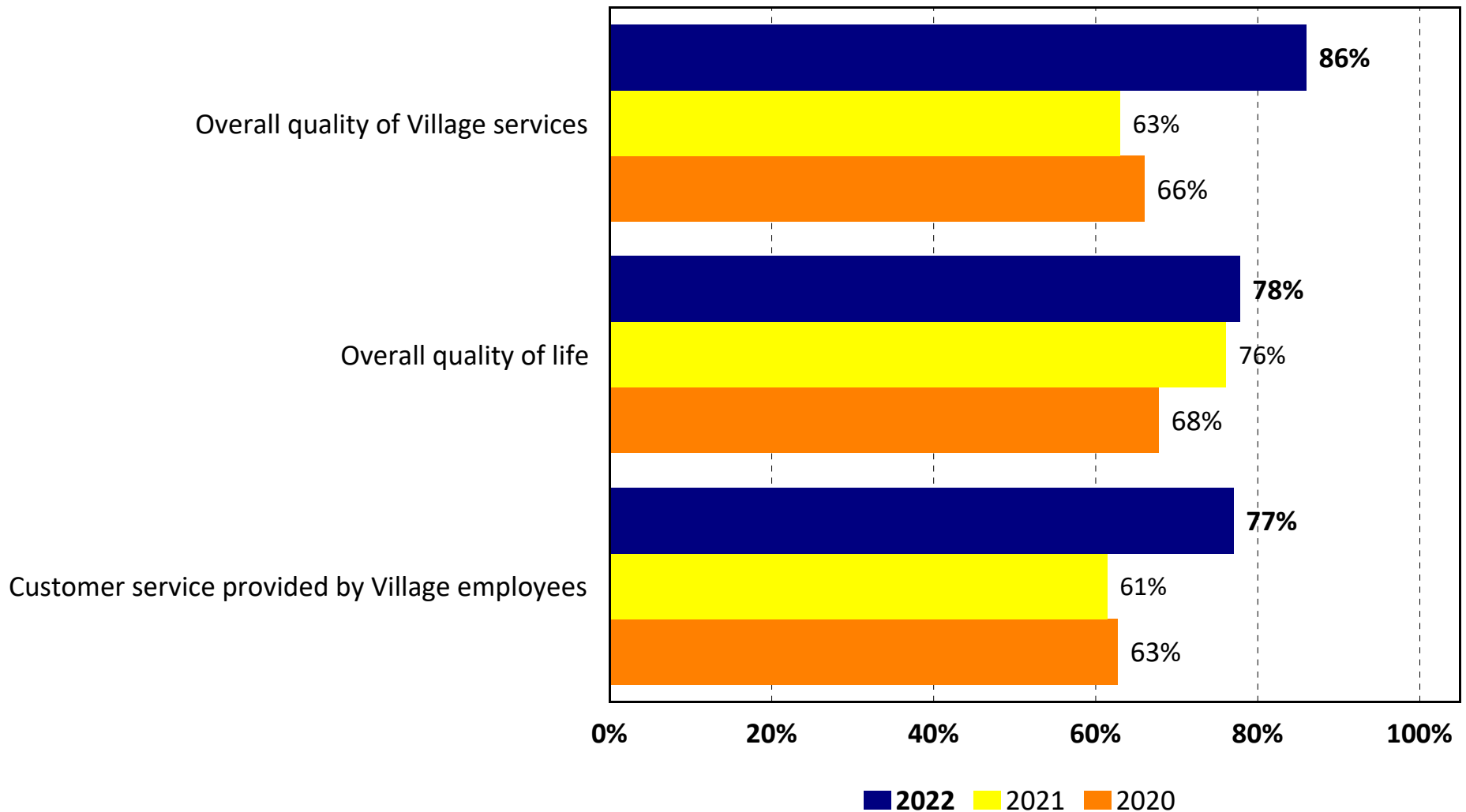
by percentage of respondents who had used the service or department and rated the item as a 1 to 5 on a 5-point scale (excluding “no opinion”)





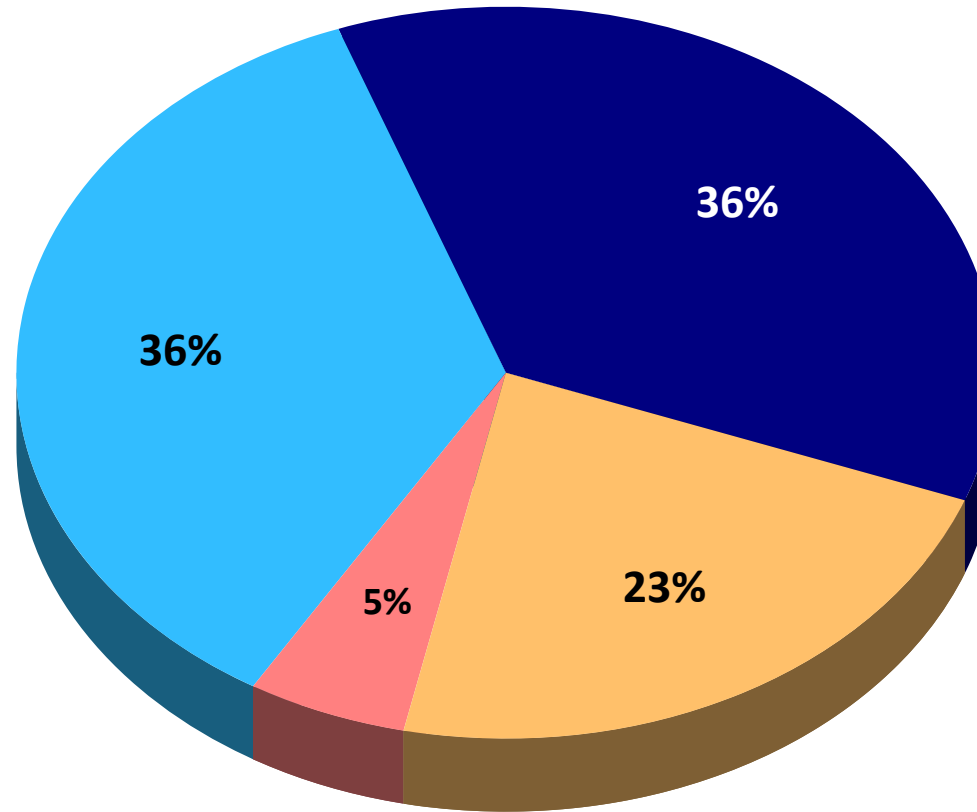
# Q8. Satisfaction with various aspects of Pinehurst compared to other places businesses have operated in the past 2020 to 2022

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



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

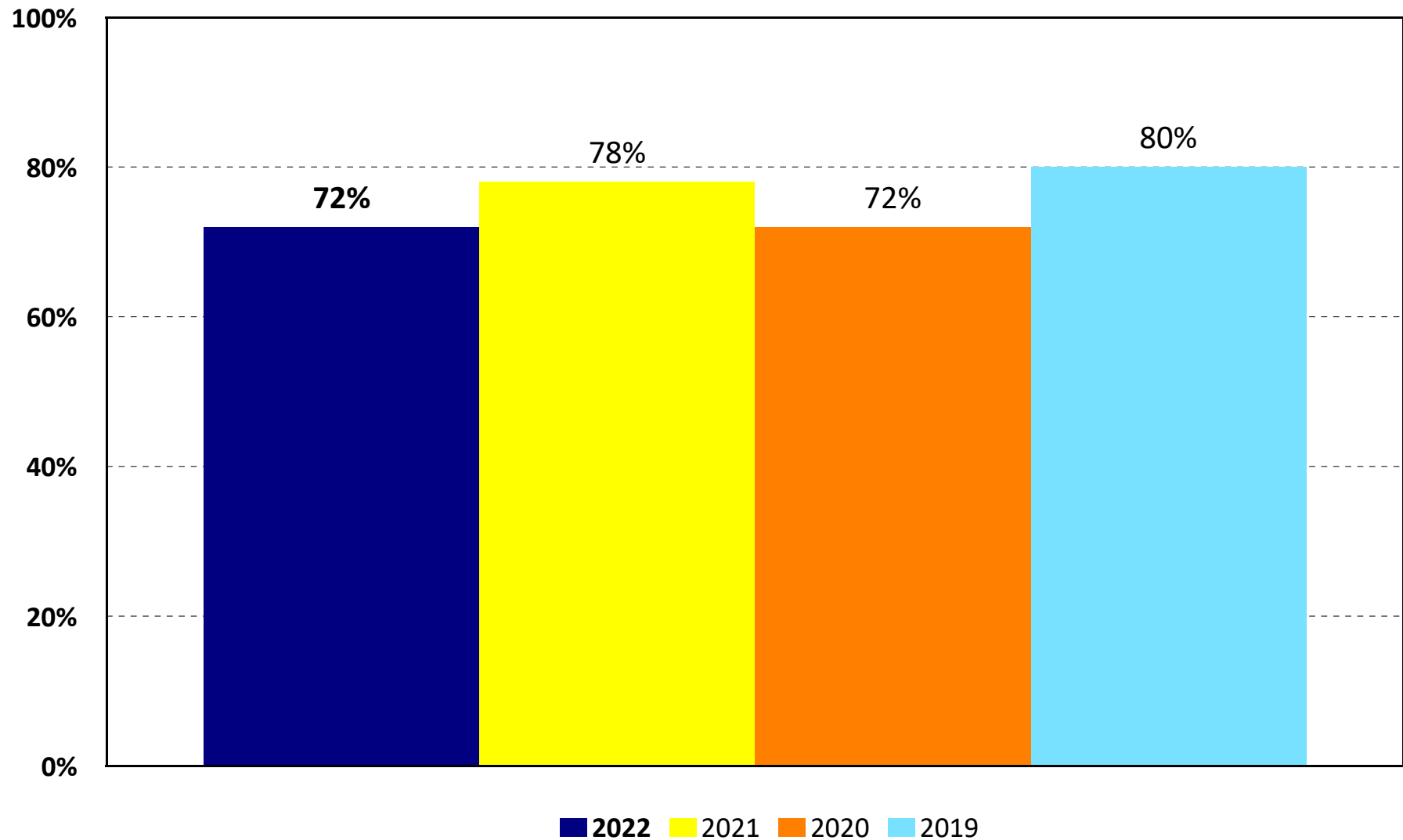
by percentage of respondents



Very good Good Poor Don't know

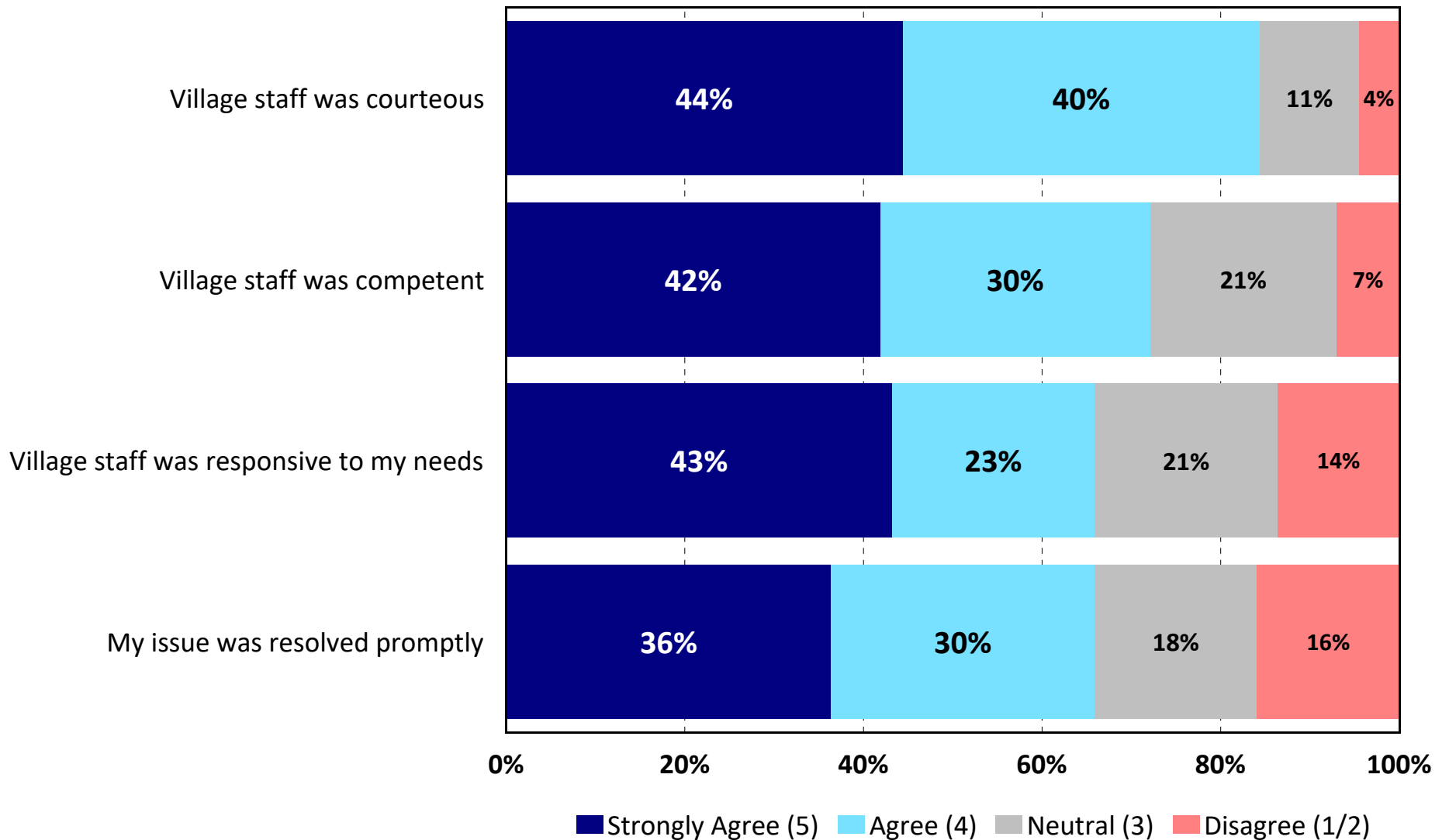
# Q9. How would you rate the Village of Pinehurst customer service? - 2019 to 2022

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



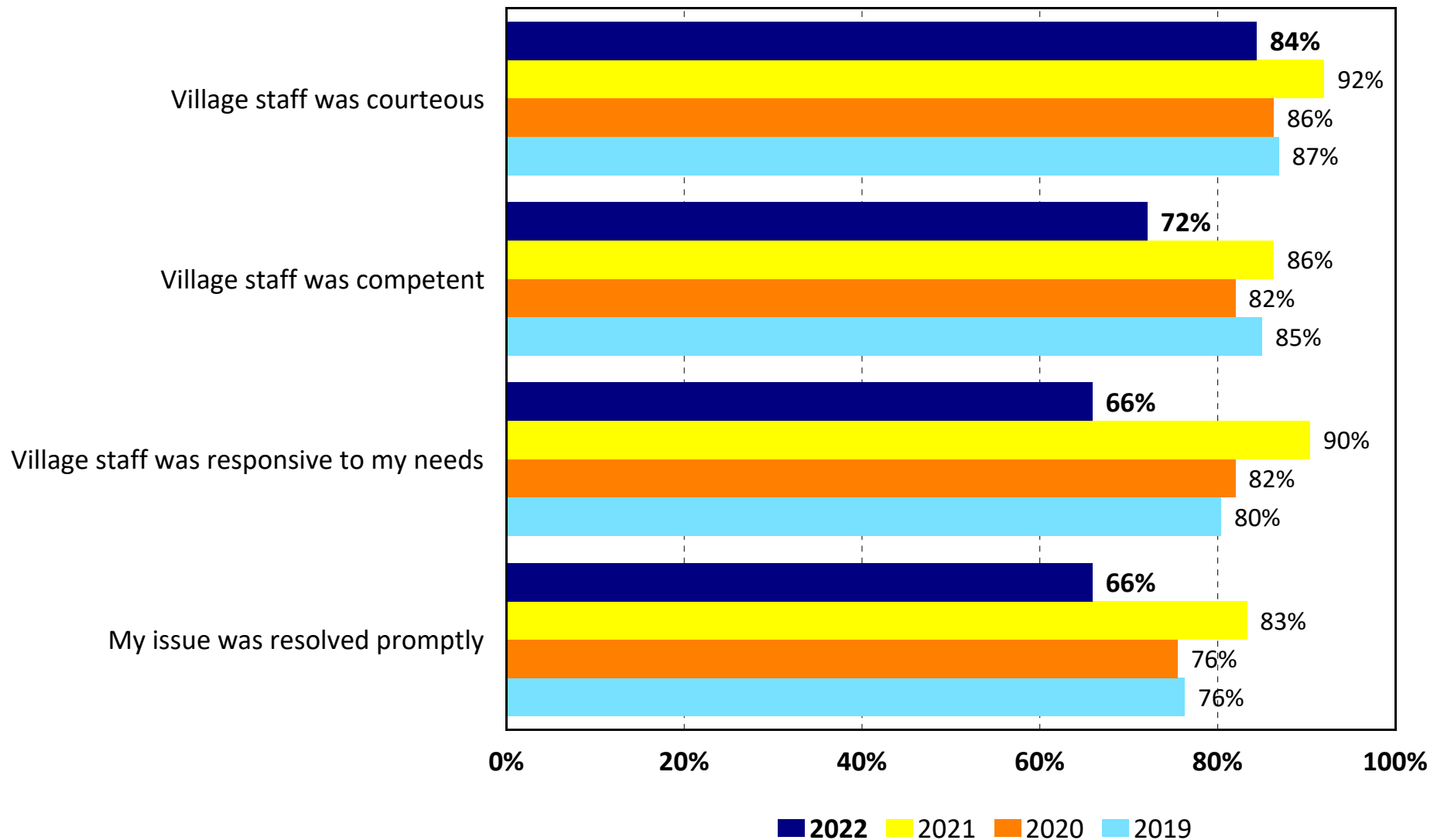
# Q10. Level of Agreement with Statements About Most Recent Contact with the Village Government Staff

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



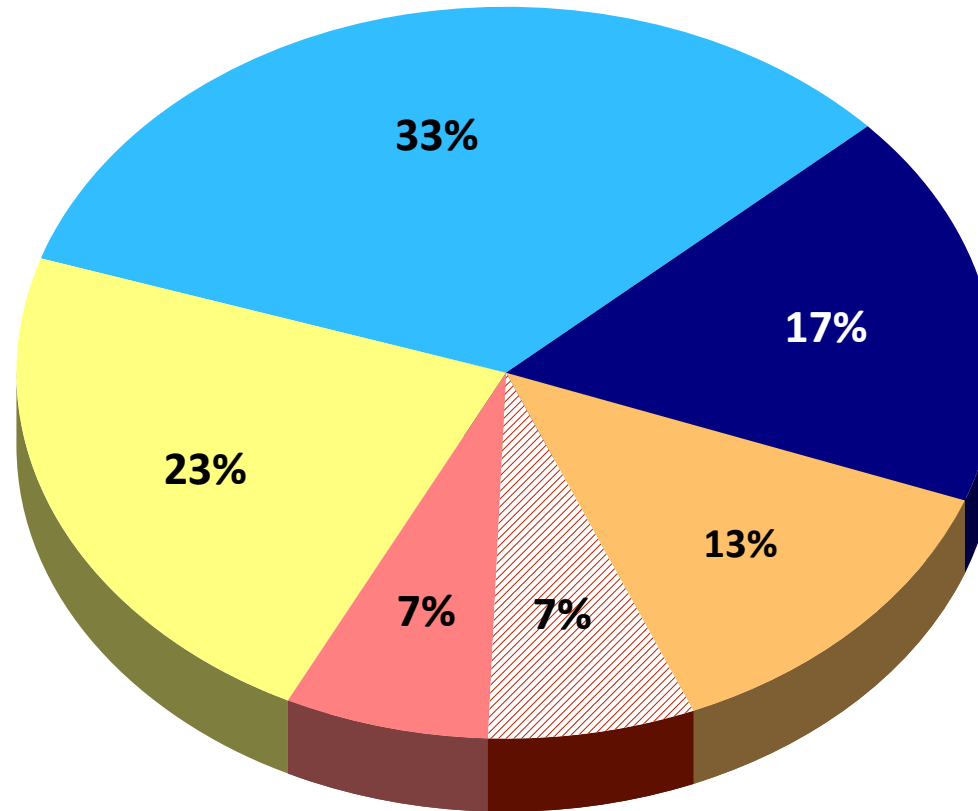
# Q10. Level of Agreement with Statements About Most Recent Contact with the Village - 2019 to 2022

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?

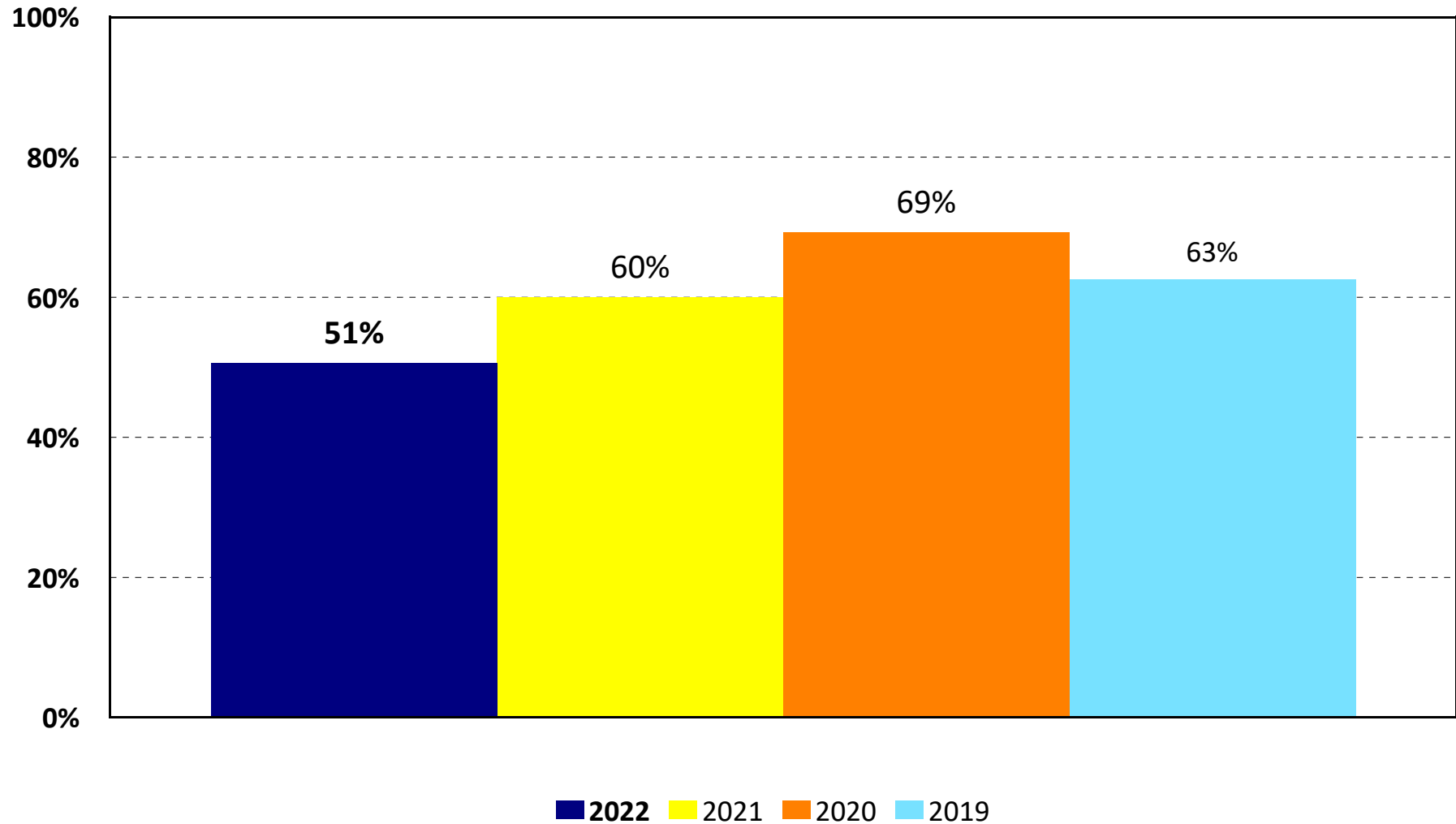
by percentage of respondents



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

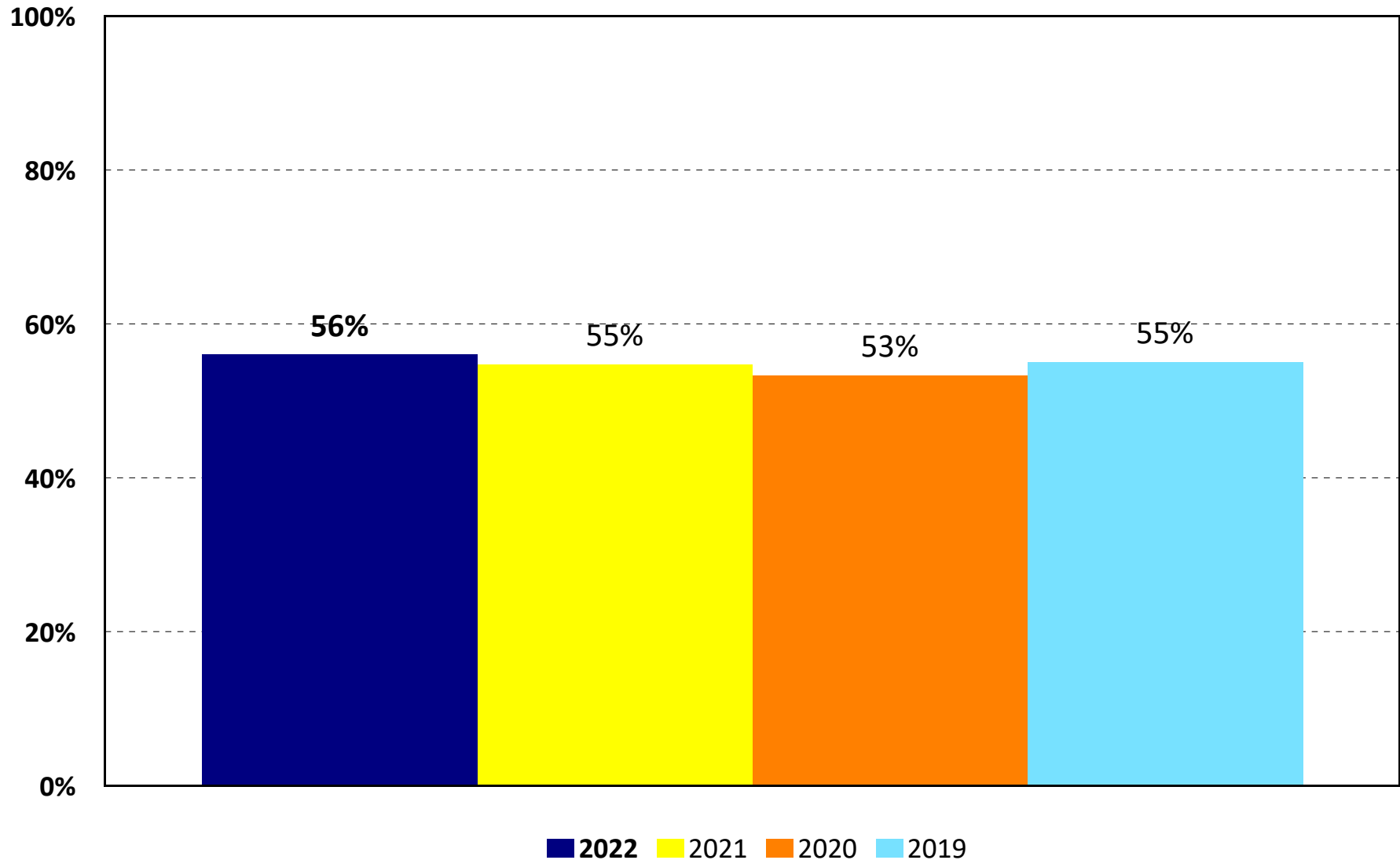
# Q11. How satisfied are you with the job the Village of Pinehurst does communicating with business owners? 2019 to 2022

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



# Q12. Have you visited the Village's website ([www.vopnc.org](http://www.vopnc.org)) during the last 12 months? - 2019 to 2022

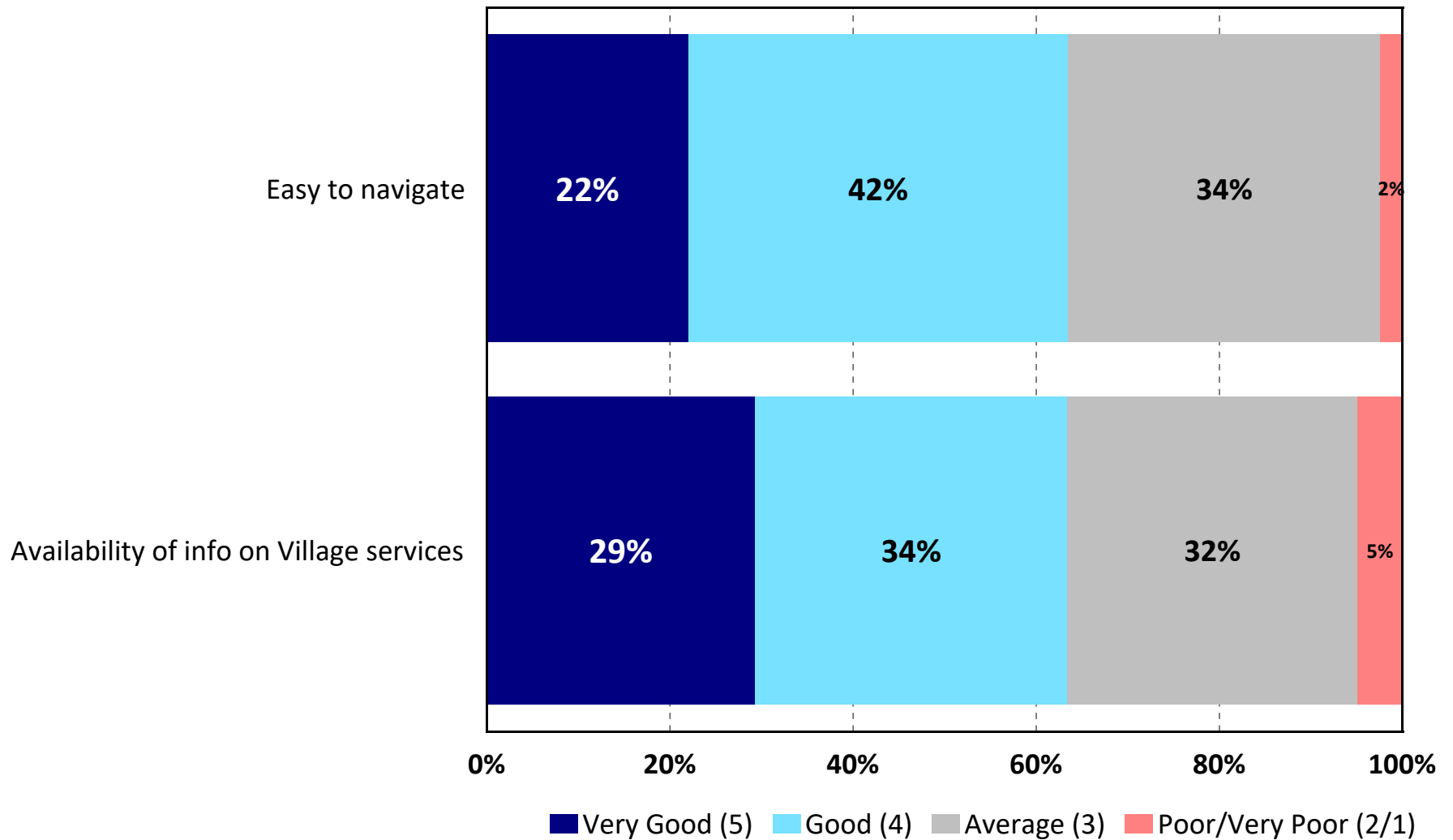
by percentage of respondents who answered "yes"





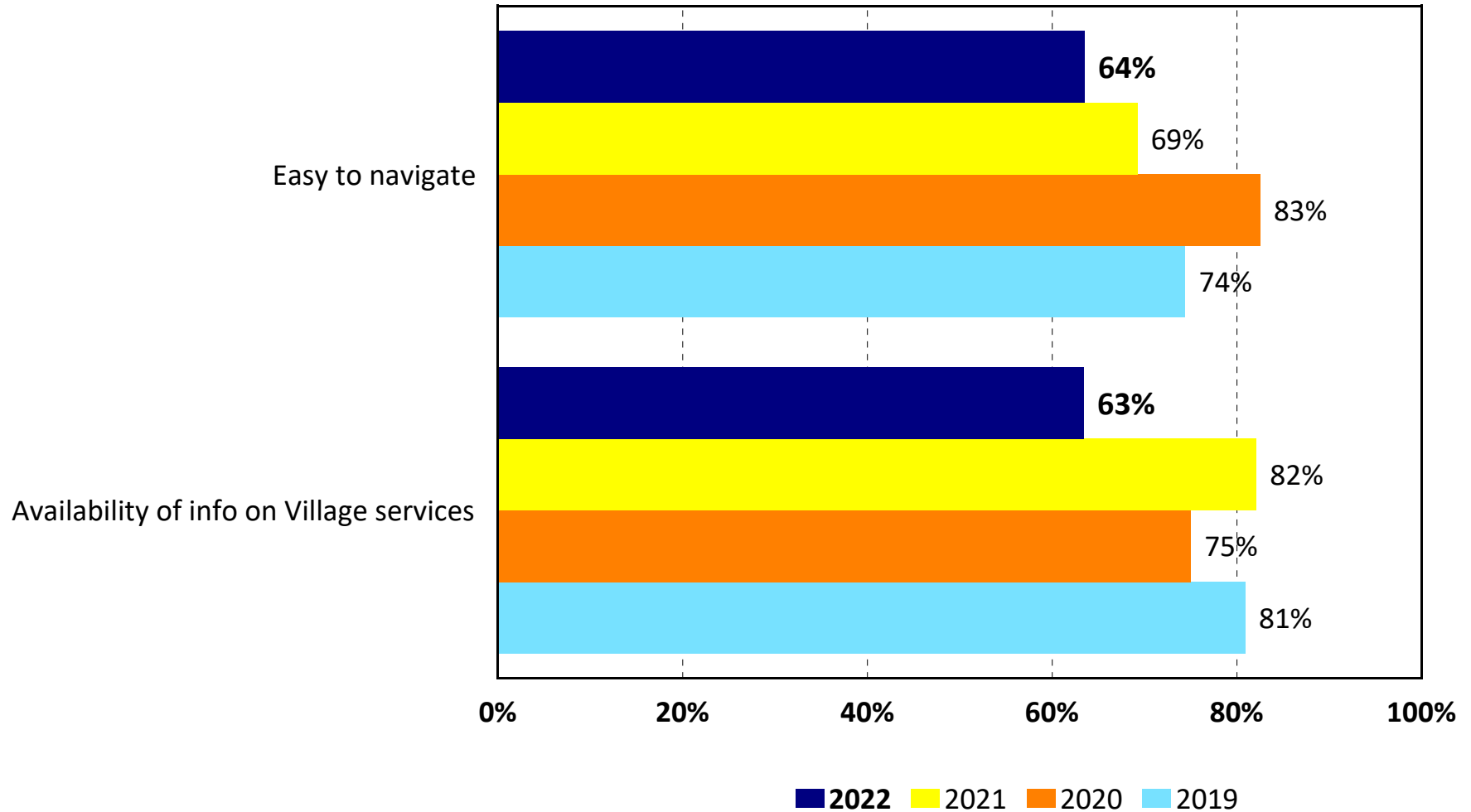
# Q12a. How would you rate the following characteristics of the Village website?

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



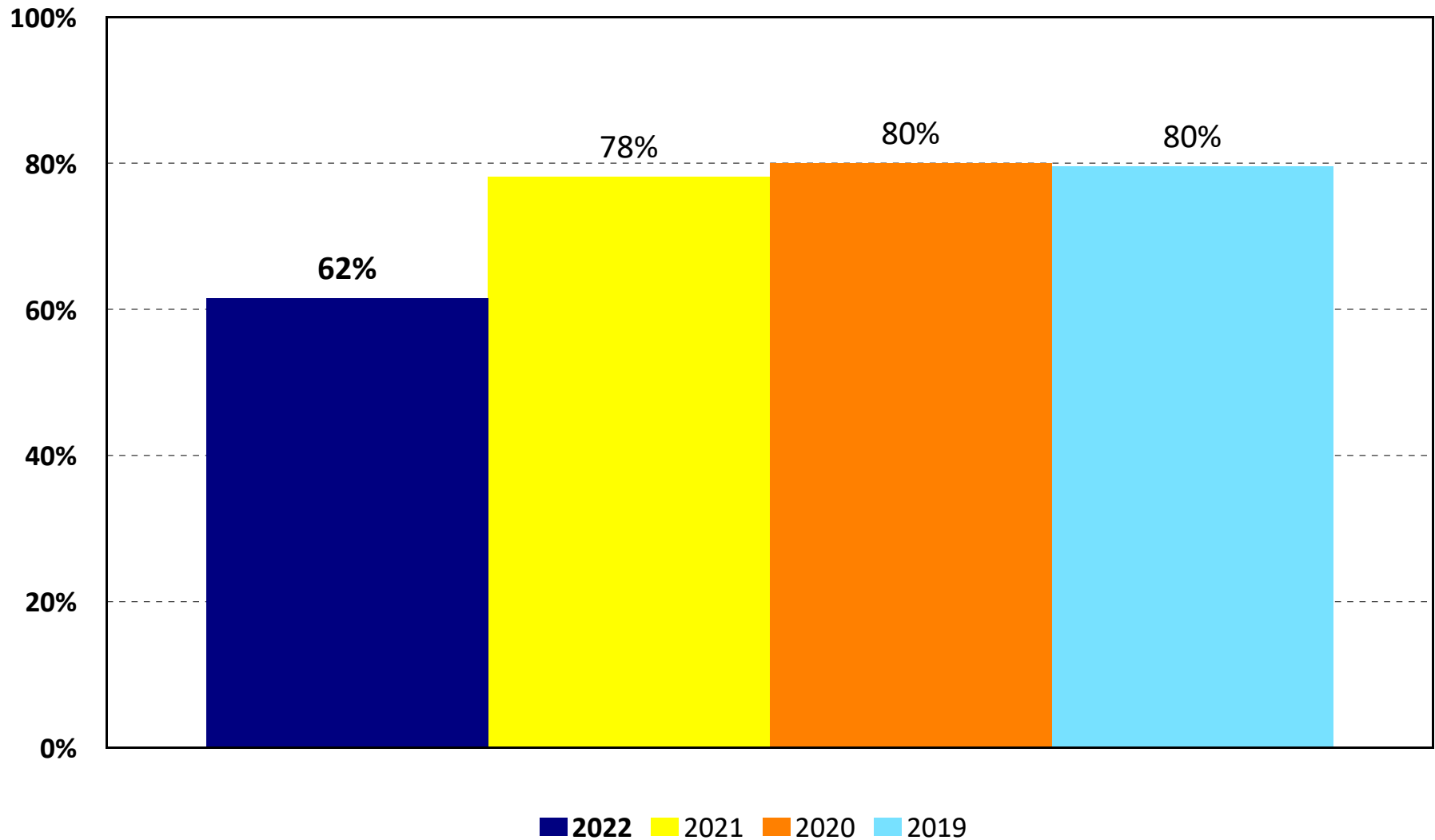
# Q12a. How would you rate the following characteristics of the Village website? - 2019 to 2022

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



# Q12b. How satisfied are you with the Village's website? 2019 to 2022

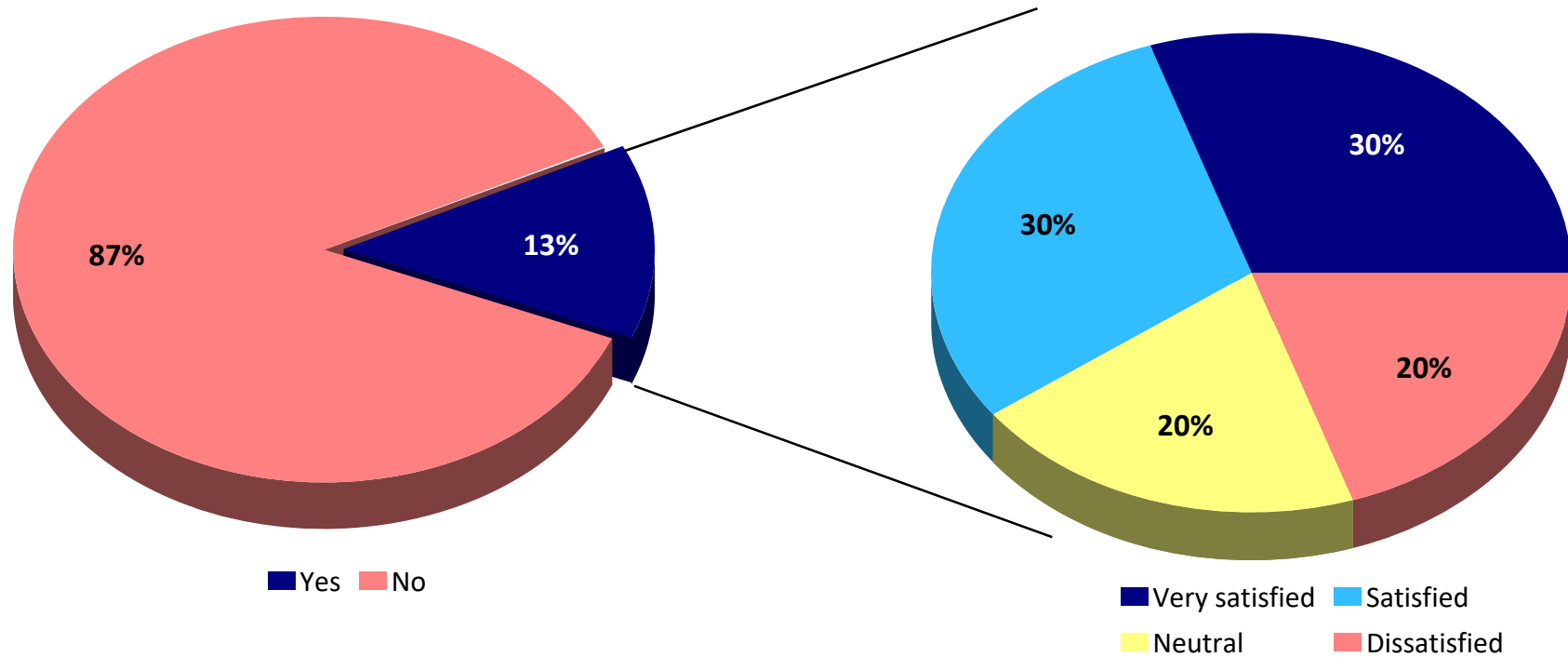
by percentage of respondents who responded "very satisfied" or "satisfied"



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

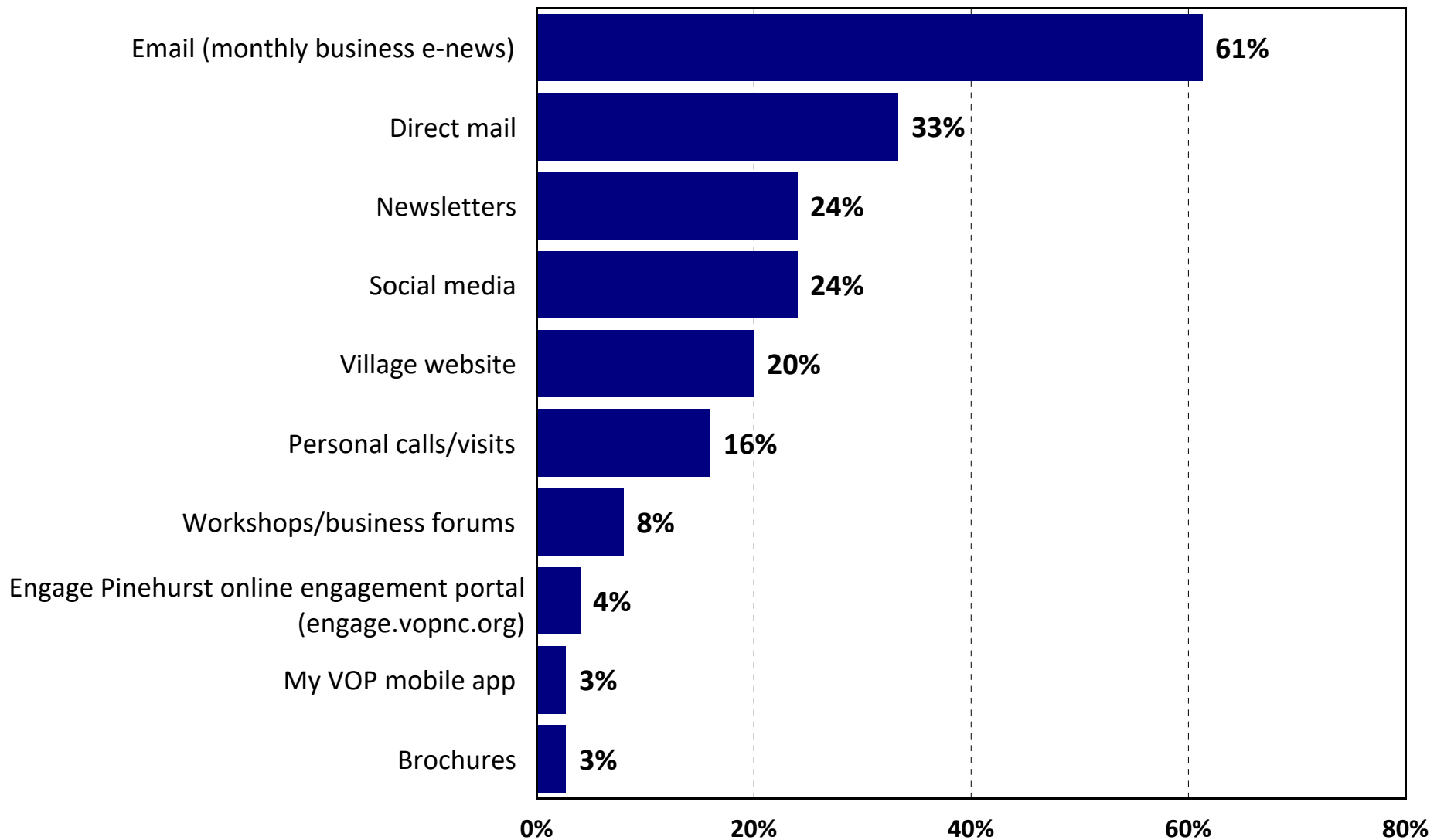
by percentage of respondents (excluding "don't know")

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



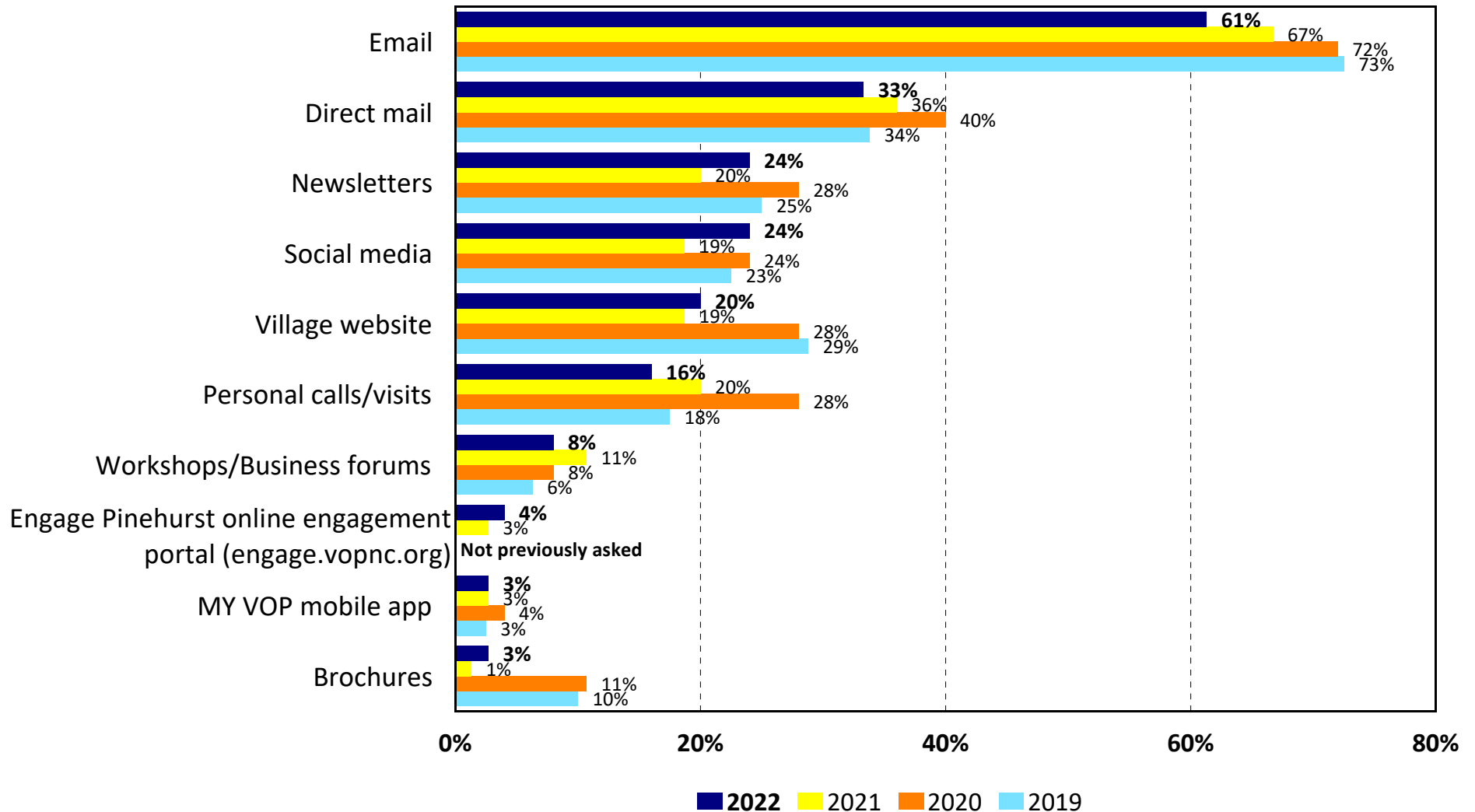
# Q14. Which of the following are the best ways for the Village to communicate important information to your business?

by percentage of respondents (multiple choices could be made)



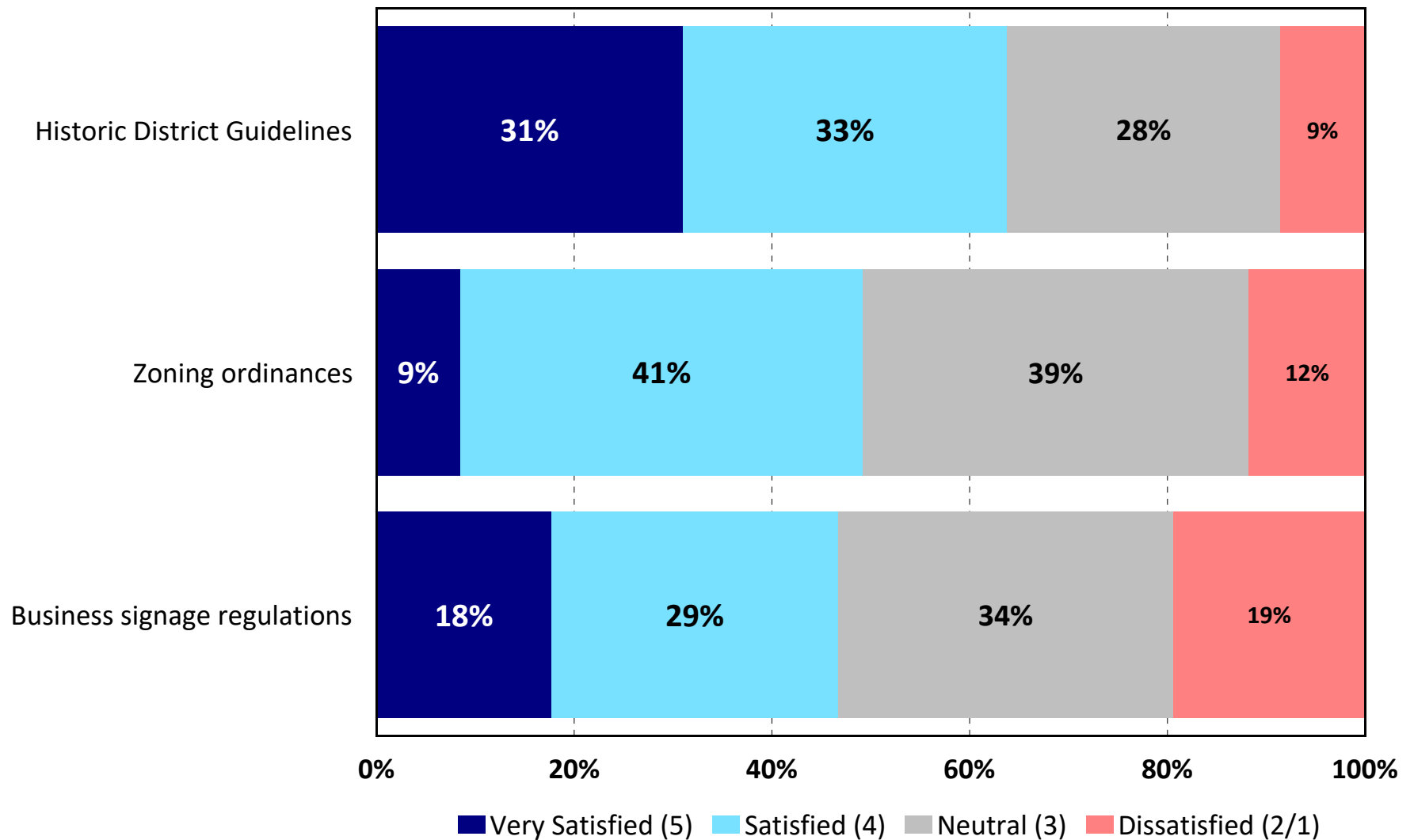
# Q14. Which of the following are the best ways for the Village to communicate important information to your business? 2019 to 2022

by percentage of respondents (multiple choices could be made)



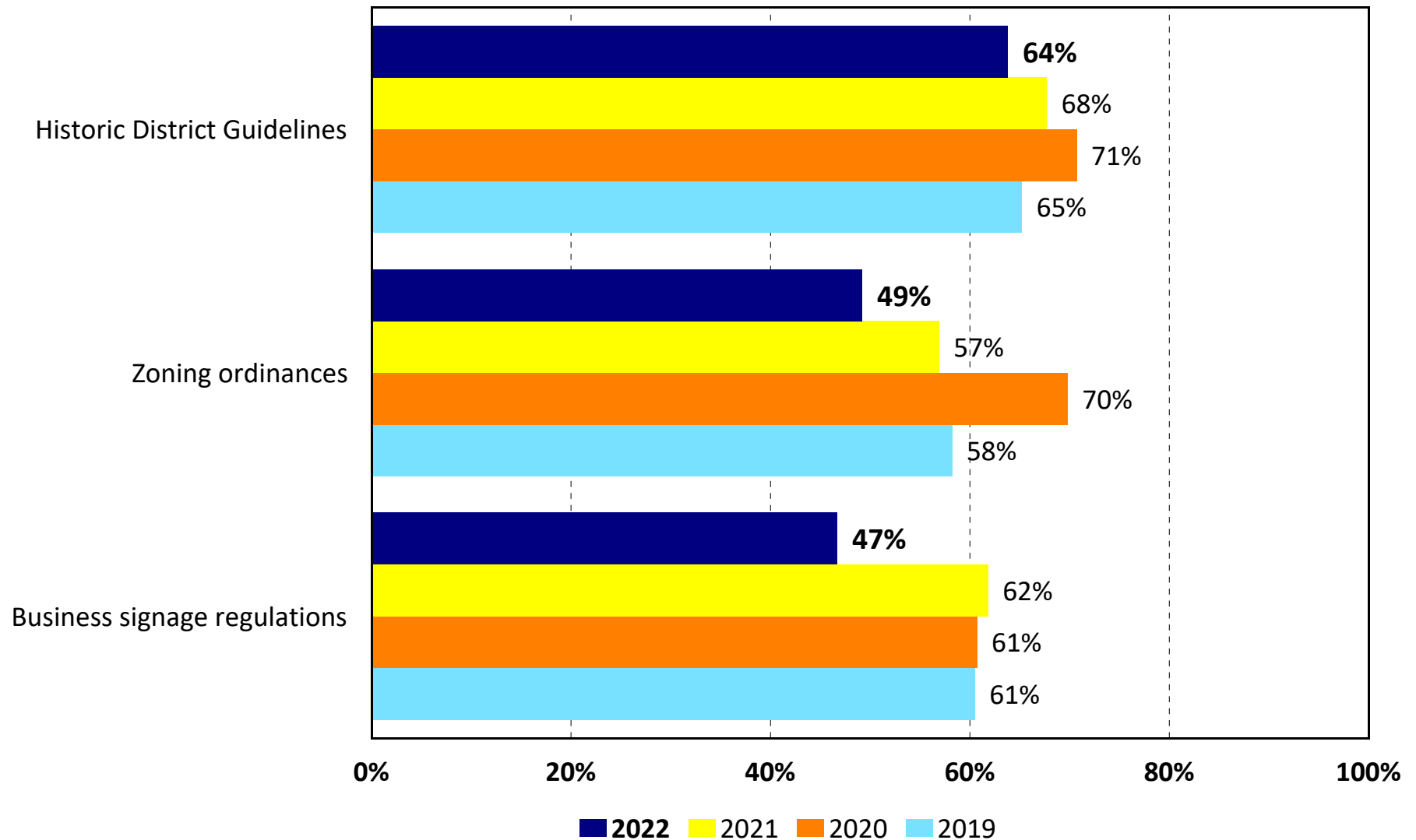
# Q15. Level of Satisfaction with Community Development (Village Codes and Ordinances)

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) - 2019 to 2022

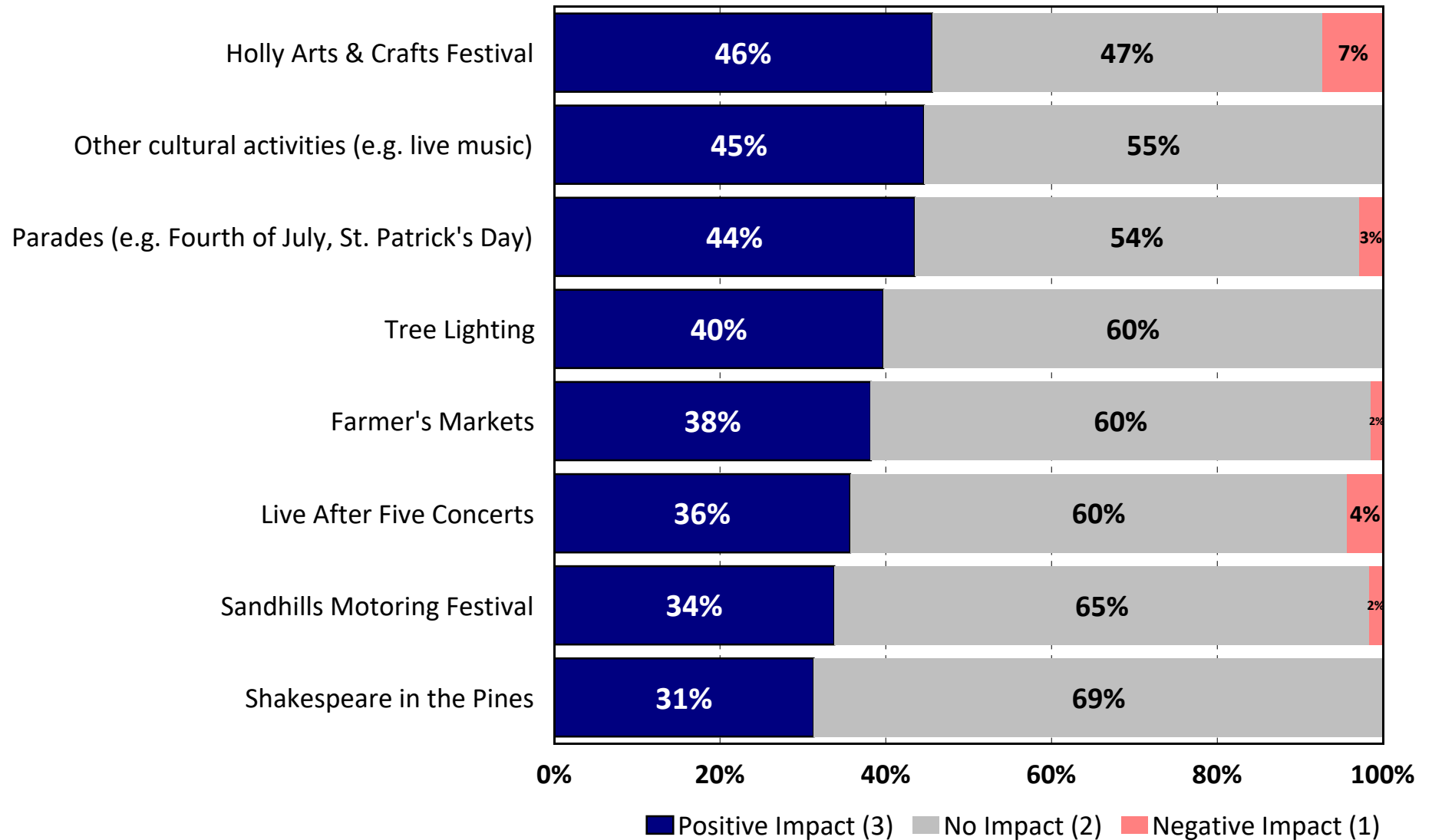
by percentage of respondents who had used the service or department and answered "very satisfied" or "satisfied"





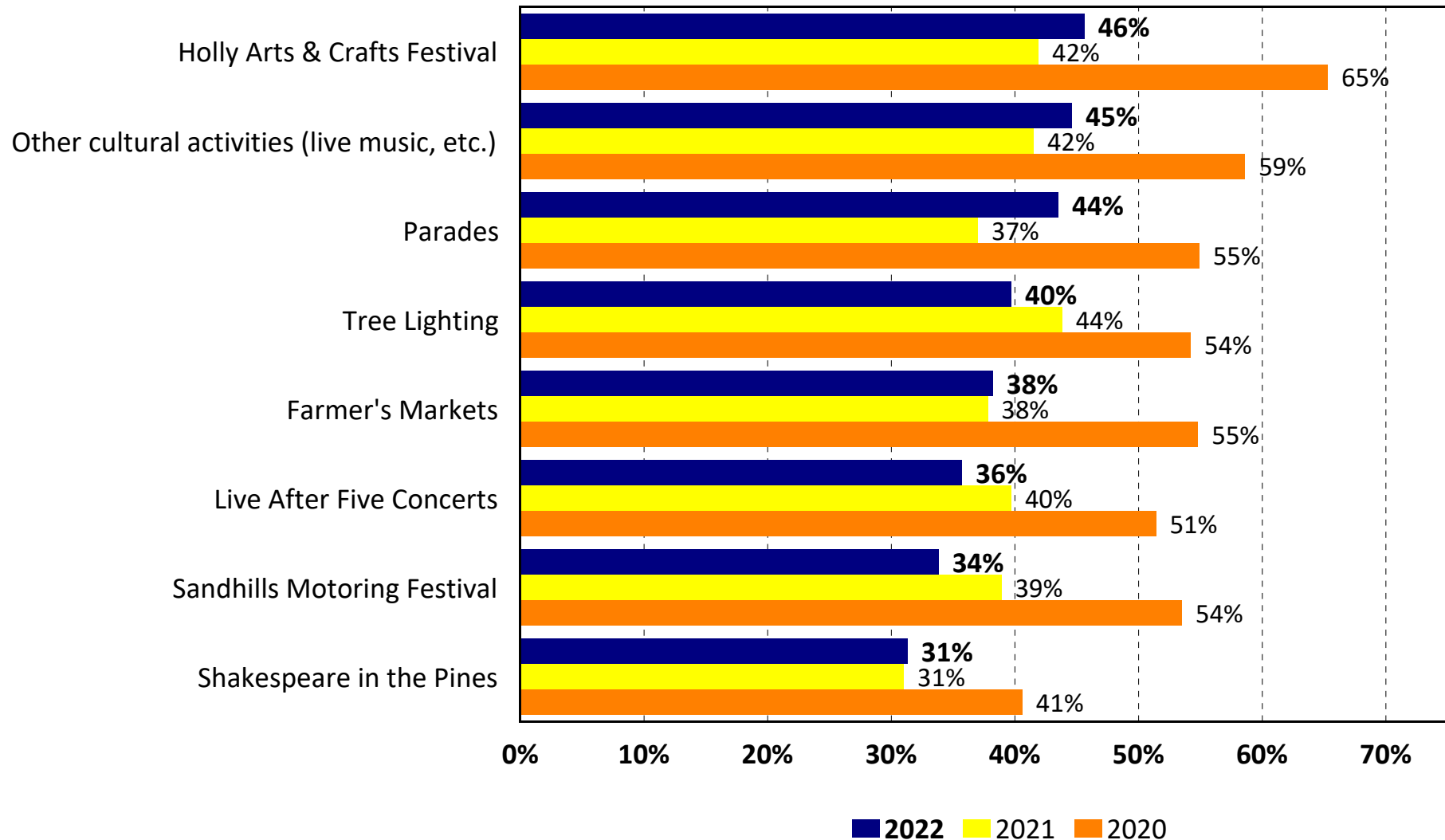
# Q16. How Businesses Feel About the Impact the Following Events in the Village Center Have on Their Business

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



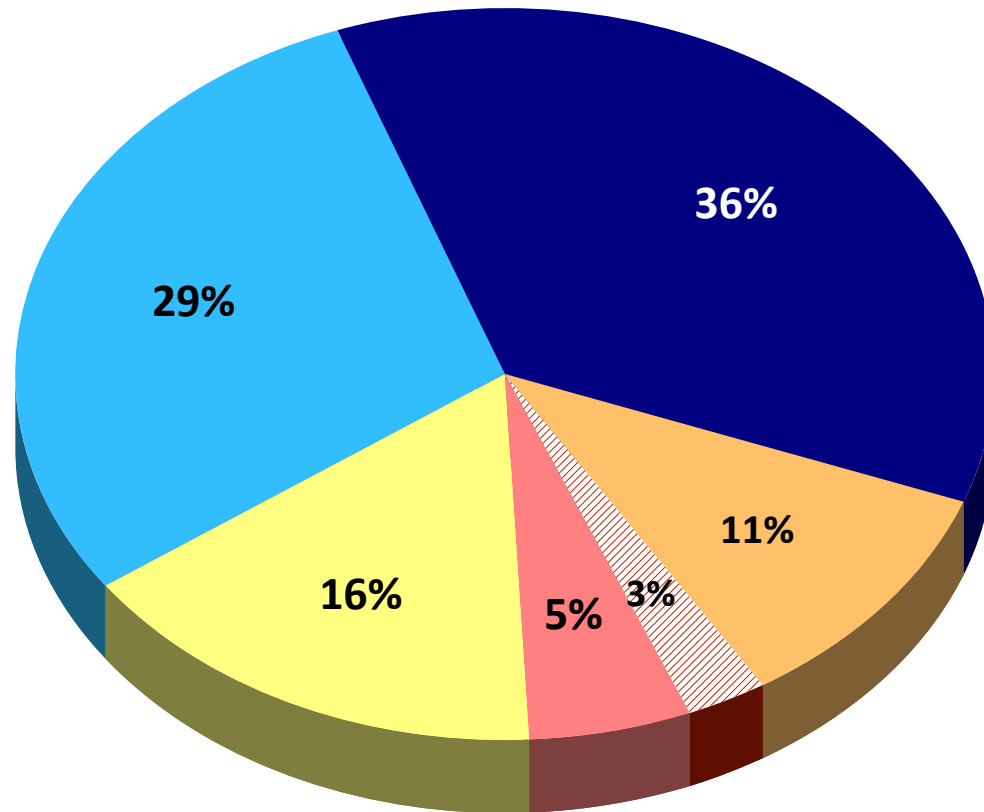
# Q16. How Businesses Feel About the Impact the Following Events in the Village Center Have on Their Business 2020 to 2022

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?

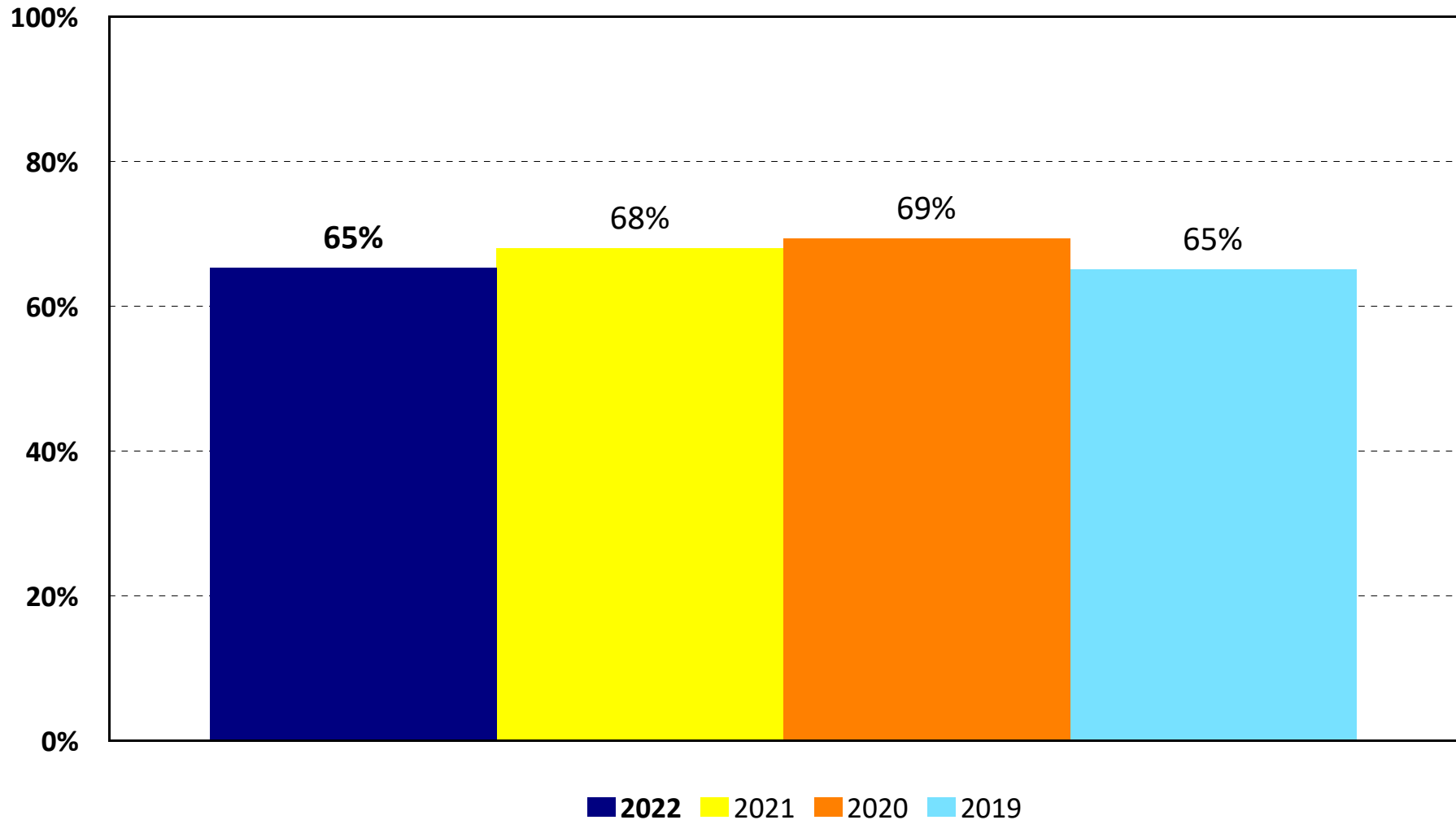
by percentage of respondents



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

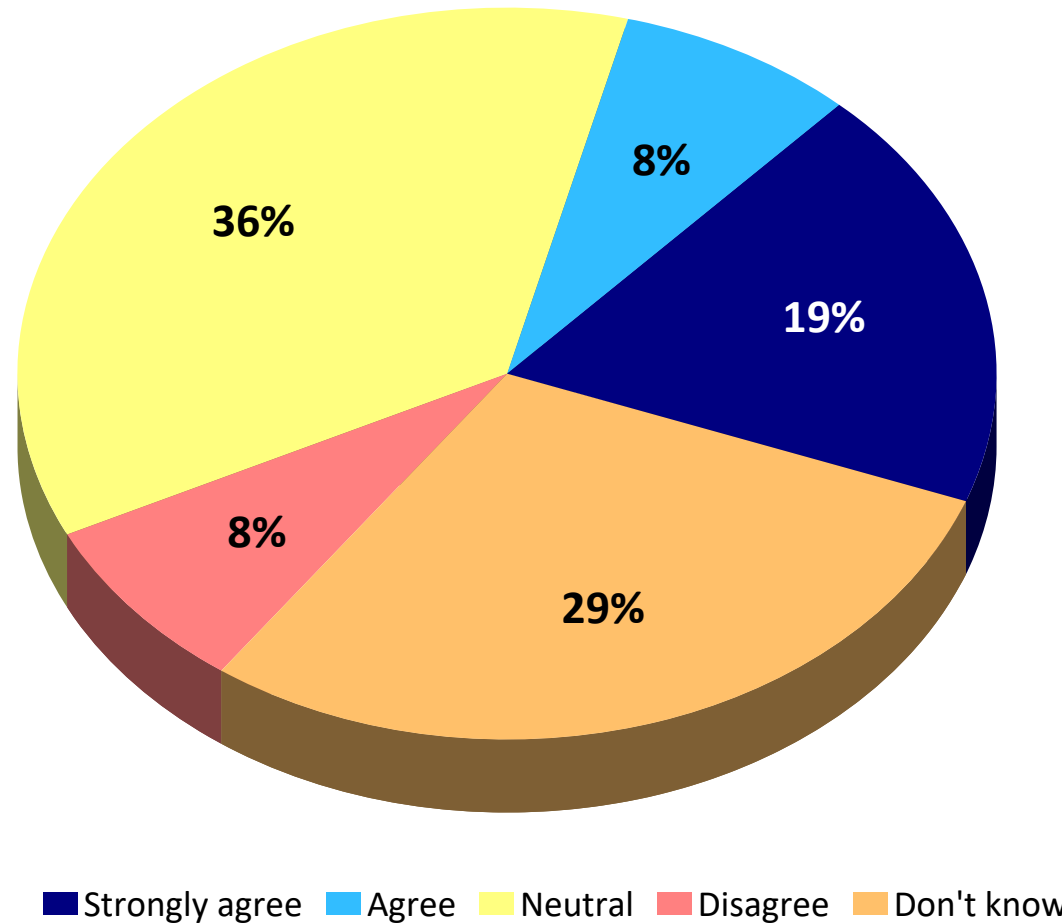
# Q17. How satisfied are you with the way the Village handles events that attract large crowds to the Village? 2019 to 2022

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



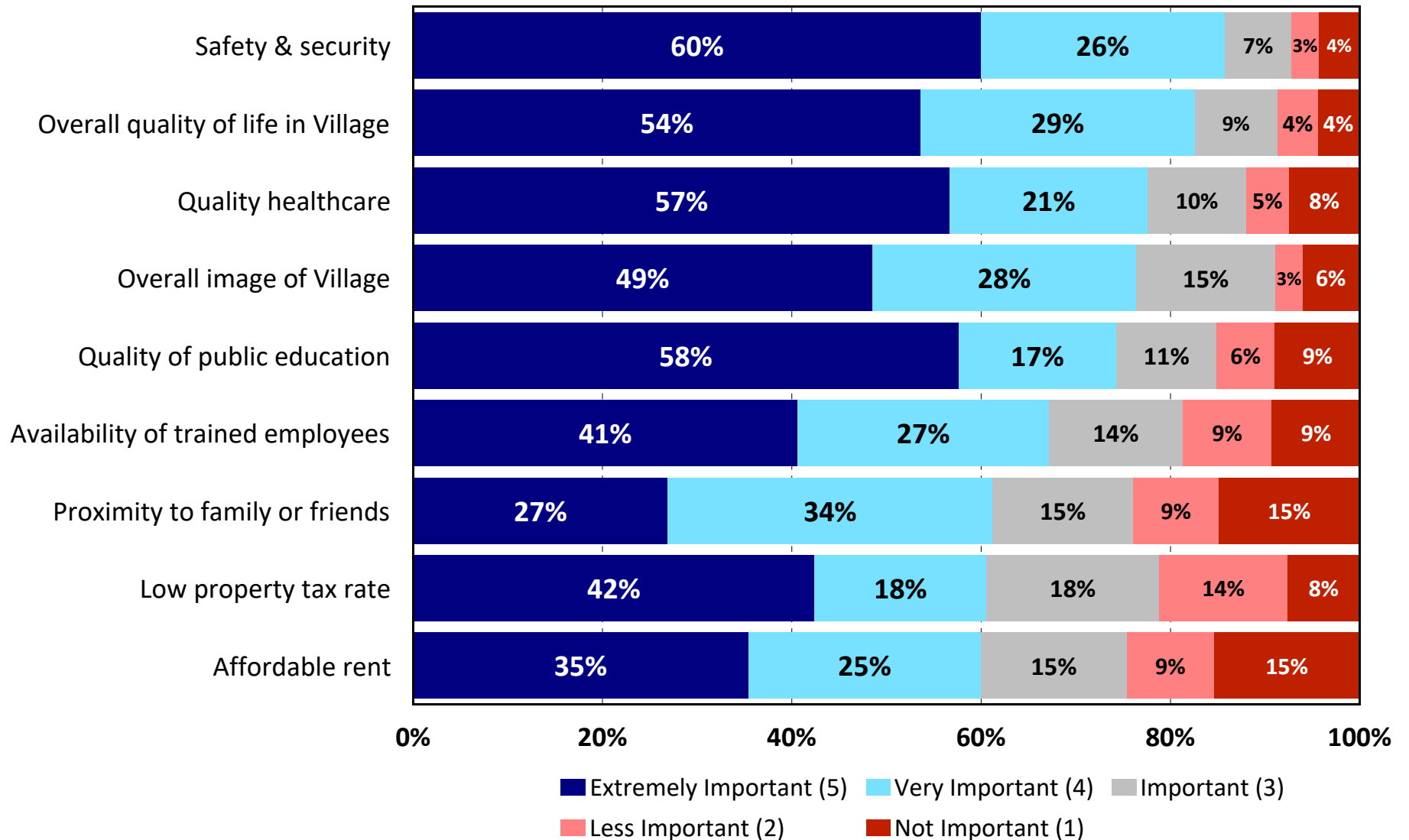
# Q18. Level of Agreement With the Statement, “The Village of Pinehurst Welcome Center brings added value to my business”

by percentage of respondents



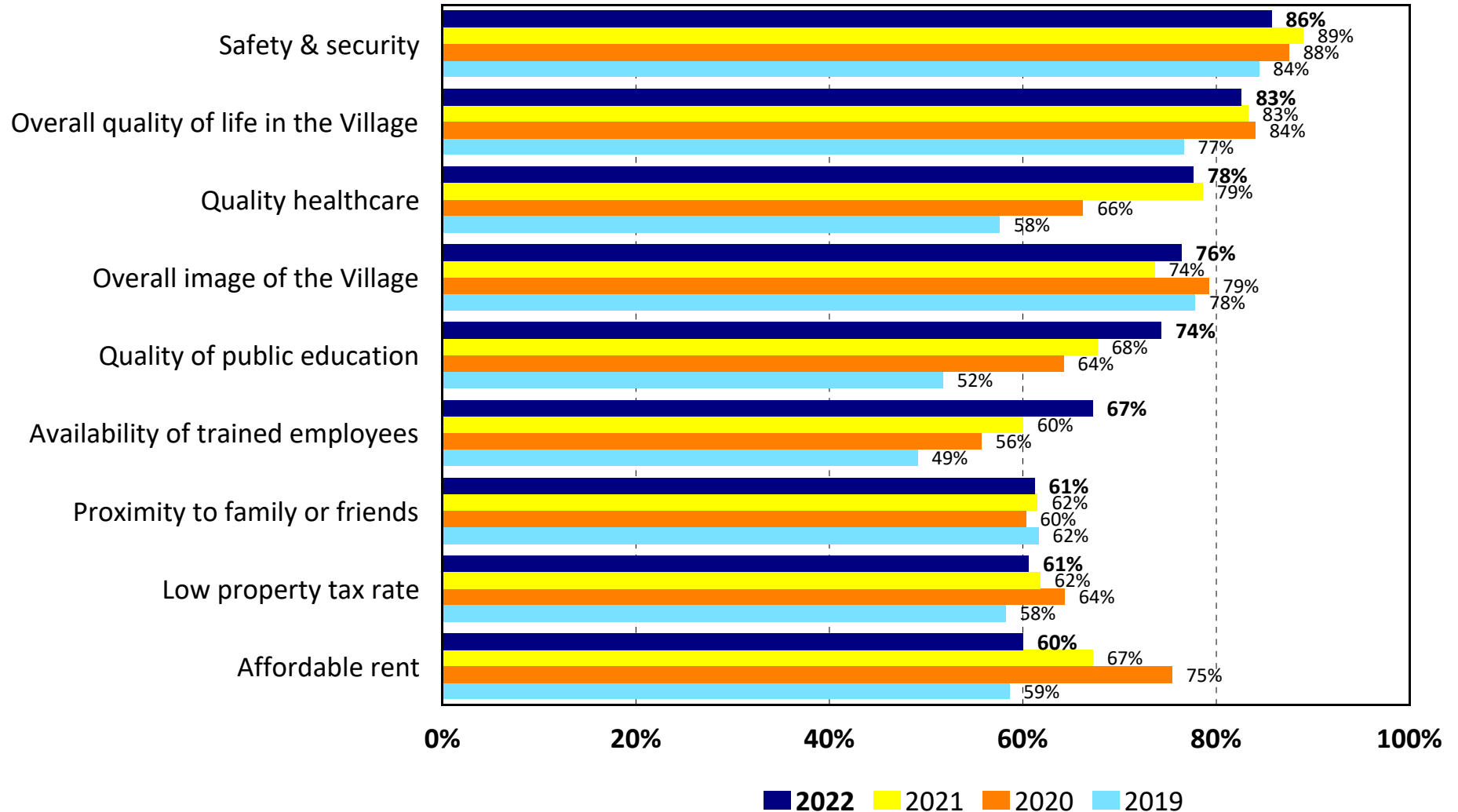
# Q19. Importance of Various Reasons in Your Decision to Locate Your Business in the Village of Pinehurst

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



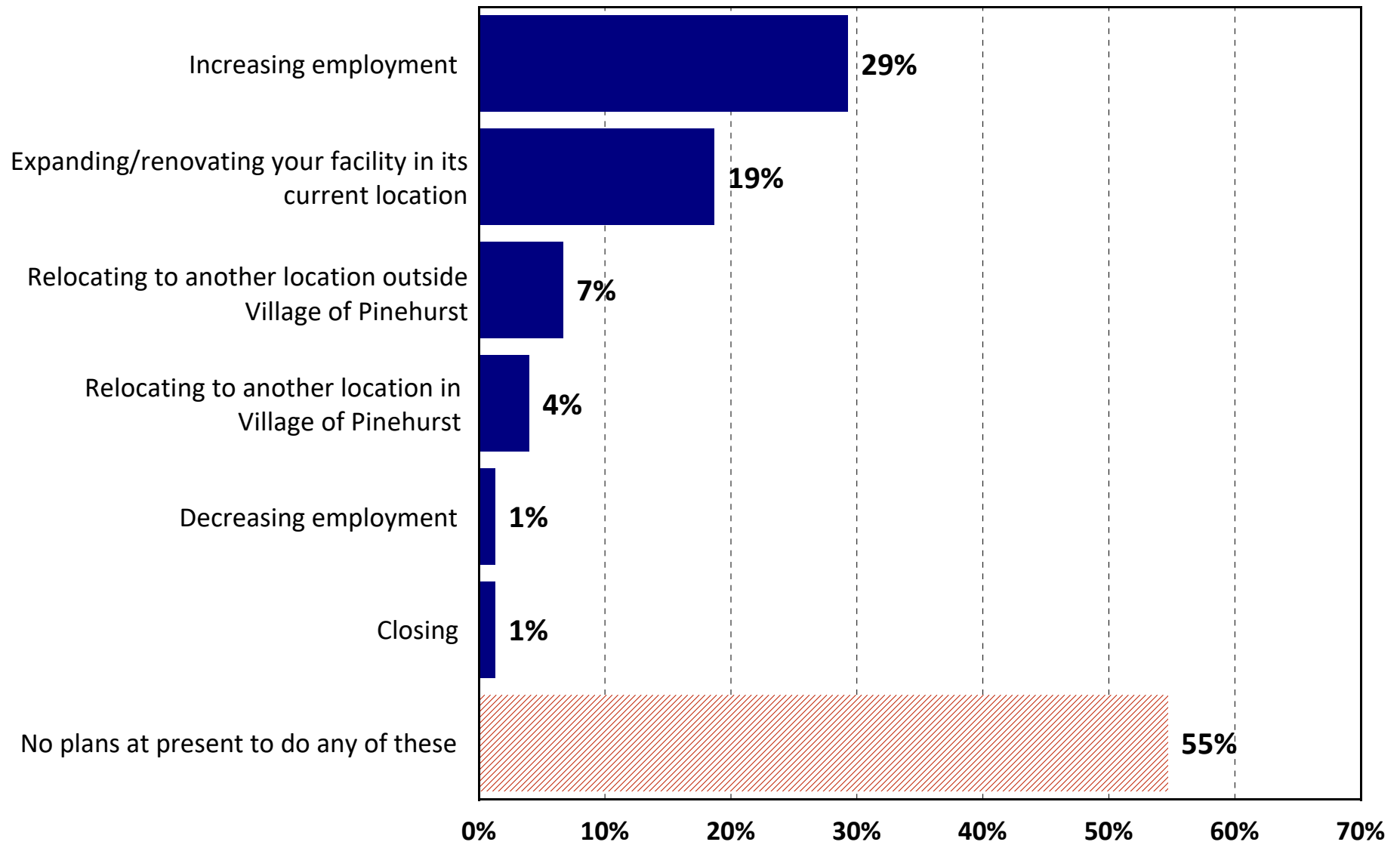
# Q19. Importance of Various Reasons in Your Decision to Locate Your Business in the Village of Pinehurst 2019 to 2022

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



# Q20. In the next three years, is your business planning to do any of the following?

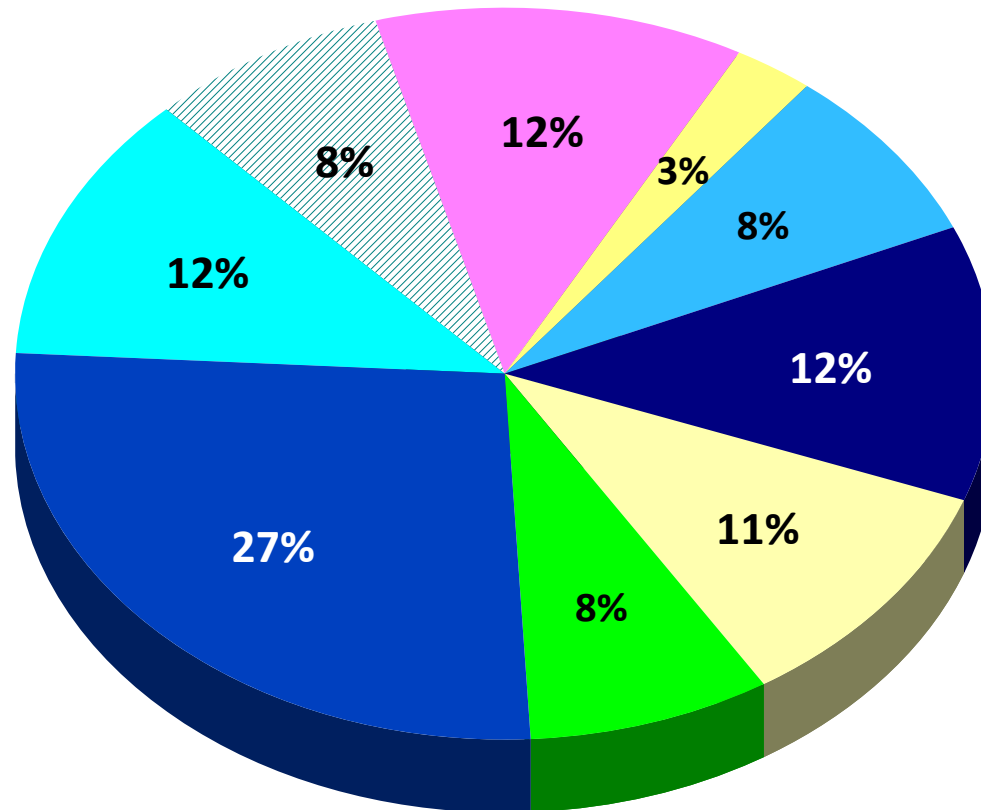
by percentage of respondents





# Q23. Primary Business Category

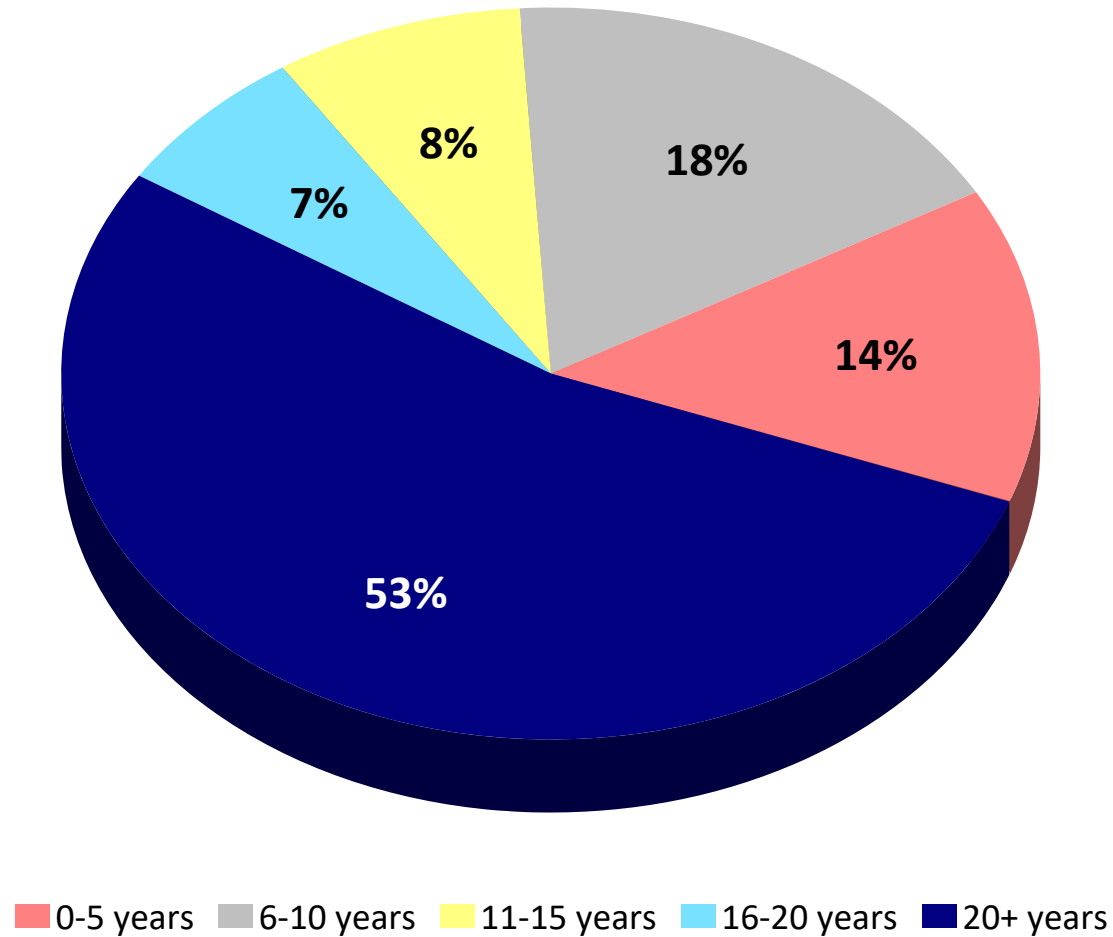
by percentage of respondents



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

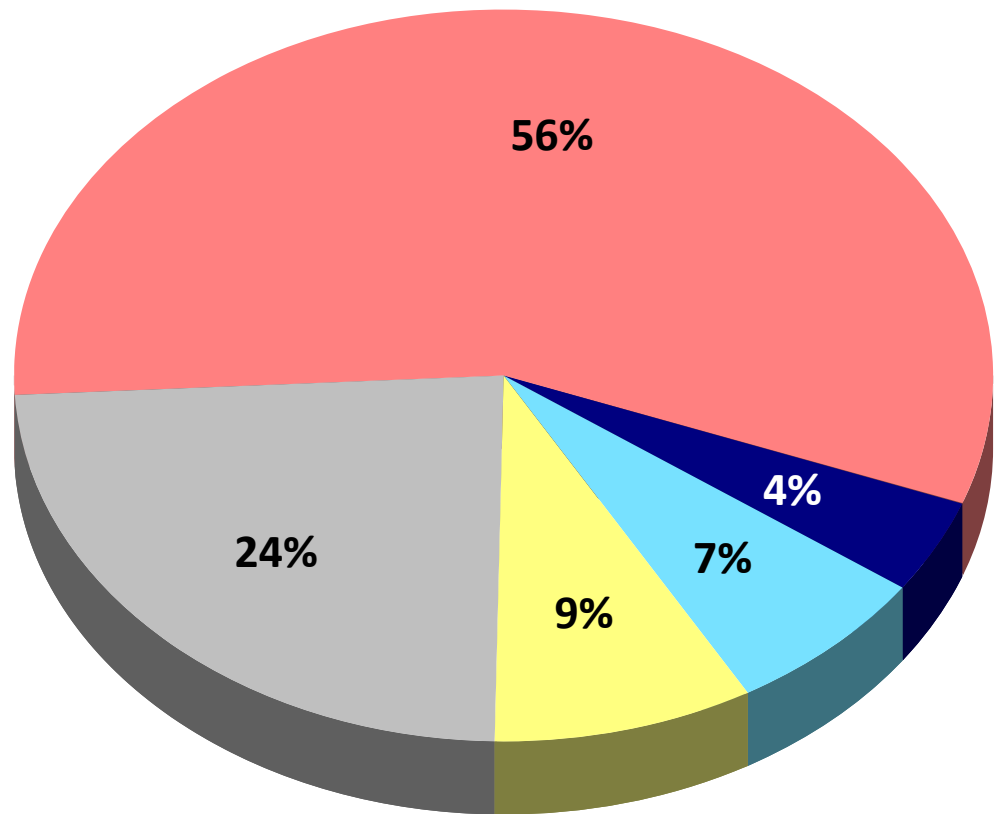
# Q24. How many years have you been in operation in the Village?

by percentage of respondents (excluding "not provided")



# Q25. Approximately how many employees does your organization employ in the Village of Pinehurst?

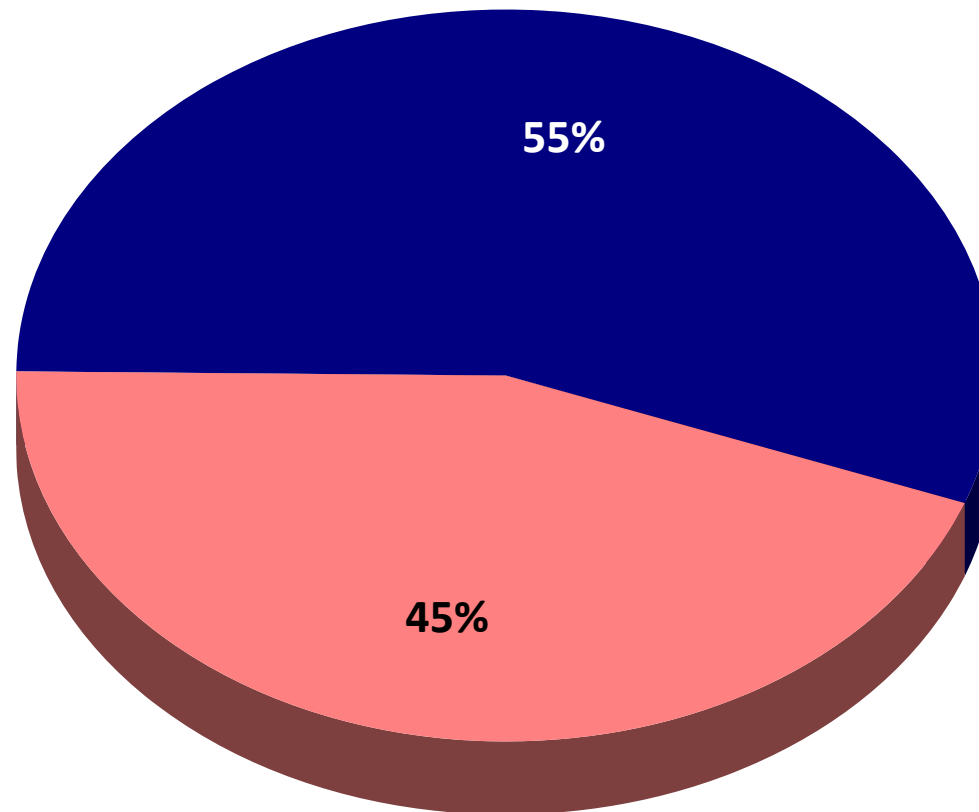
by percentage of respondents (excluding "not provided")



■ Less than 10 ■ 10 to 24 ■ 25 to 49 ■ 50 to 99 ■ 100+

# Q26. Is your personal residence in the Village of Pinehurst?

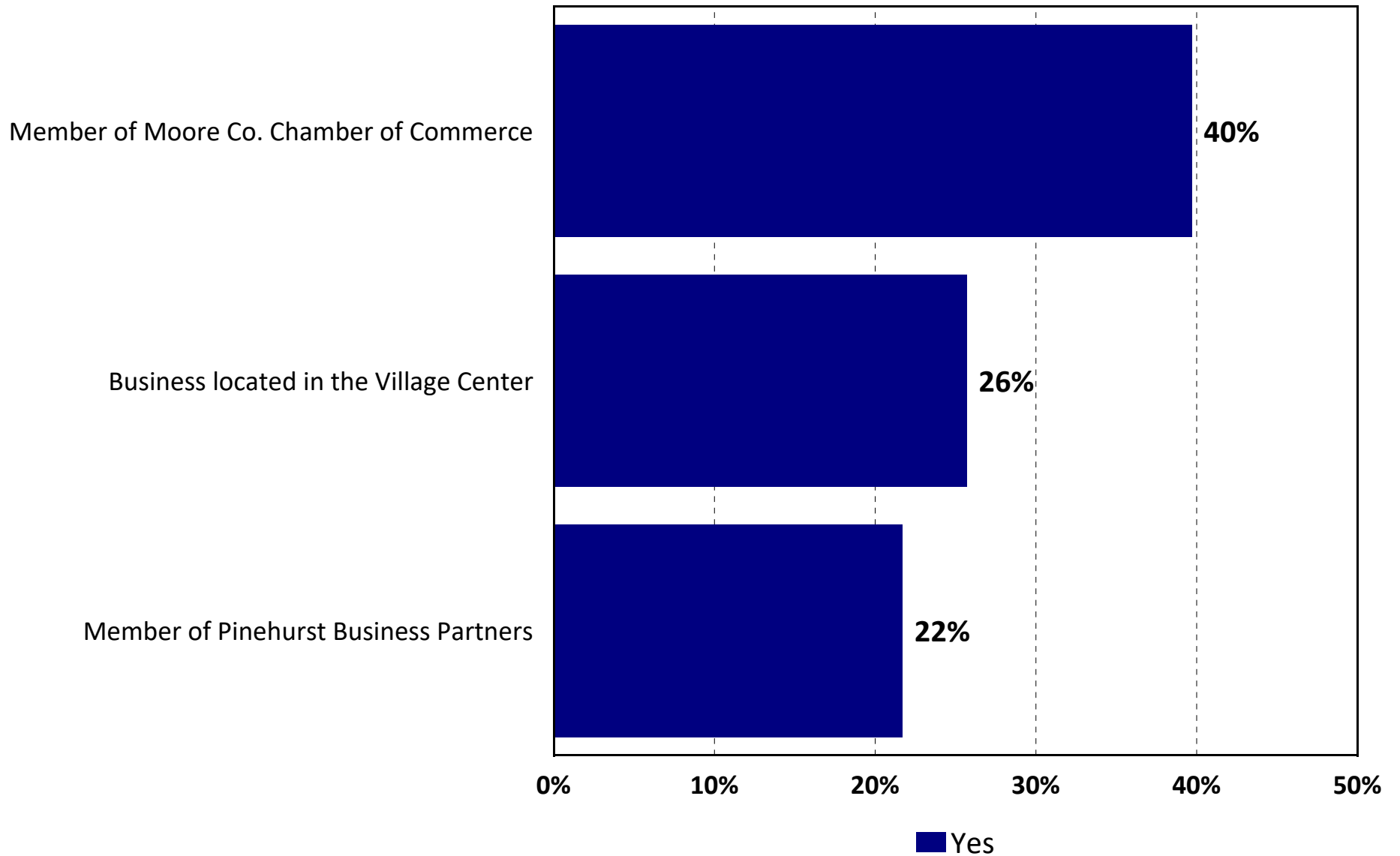
by percentage of respondents (excluding "not provided")



■ Yes ■ No

# Q27. 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.  $[IS = \text{Importance} \times (1 - \text{Satisfaction})]$ .

**Example of the Calculation:** Respondents were asked to identify the major categories of Village services they think are most important to their business. Nearly half (49.3%) of respondents selected *police patrol* as one of the most important services for the Village to provide.

With regard to satisfaction, 91.1% of respondents surveyed rated the Village's overall performance of *police patrol* as a "4" or "5" on a 5-point scale (where "5" means "Very Satisfied") excluding "Don't Know" responses. The I-S rating was calculated by multiplying the sum of the most important percentages by 1 minus the sum of the satisfaction percentages. In this example, 49.3% was multiplied by 8.9% (1-0.911). This yielded an I-S rating of 0.0439, which ranked second 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 Business Survey are provided on the following page.



## 2022 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
<b>Medium Priority (IS &lt;.10)</b>						
Planning & Zoning	15%	6	65%	9	0.0515	1
Police Patrol	49%	2	91%	5	0.0439	2
Police Emergency Response	45%	3	92%	3	0.0376	3
Code Enforcement	11%	8	69%	8	0.0331	4
Streets & Grounds	23%	5	90%	7	0.0226	5
Fire Inspections	25%	4	91%	4	0.0221	6
Village Hall (Front Desk)	9%	9	90%	6	0.0094	7
Building Inspections	13%	7	95%	2	0.0064	8
Fire Emergency Response	51%	1	100%	1	0.0000	9

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

#### Most Important %:

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

#### Satisfaction %:

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

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# Importance-Satisfaction 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).

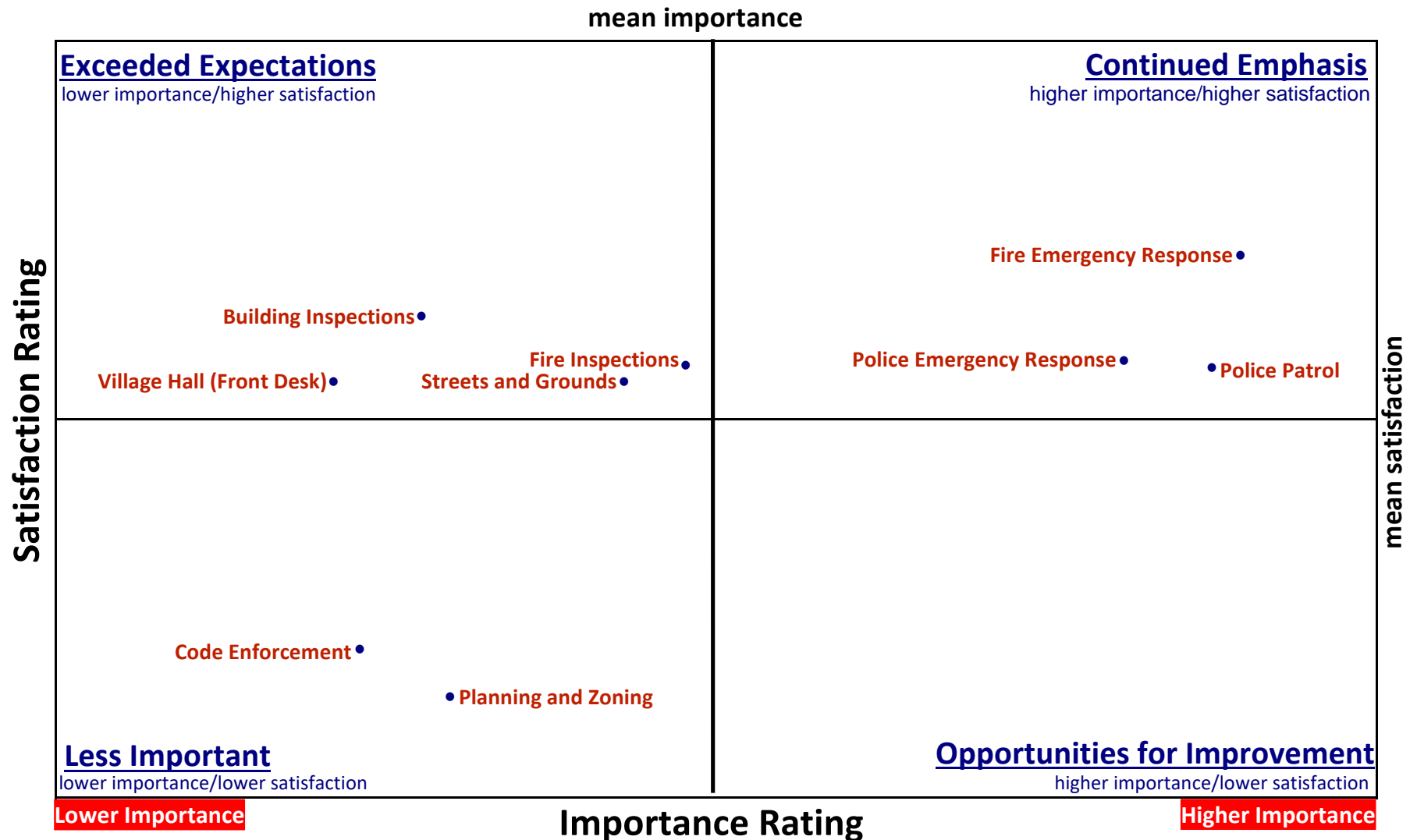
- **Continued Emphasis (above average importance and above average satisfaction).** This area shows where the Village is meeting customer expectations. Items in this area have a significant impact on the customer's overall level of satisfaction. The Village should maintain (or slightly increase) emphasis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

# 2022 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)





**3**

# Tabular Data

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

(N=75)

	Yes	No
Q1-1. Building Inspections	28.0%	72.0%
Q1-2. Fire Inspections	62.7%	37.3%
Q1-3. Planning & Zoning	26.7%	73.3%
Q1-4. Code Enforcement	22.7%	77.3%
Q1-5. Police Patrol	46.7%	53.3%
Q1-6. Police Emergency Response	33.3%	66.7%
Q1-7. Fire Emergency Response	25.3%	74.7%
Q1-8. Village Hall (Front Desk)	26.7%	73.3%
Q1-9. Streets & Grounds	26.7%	73.3%

**Q1. If "Yes," please rate the service or department using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."**

(N=68)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q1-1. Building Inspections	61.9%	33.3%	4.8%	0.0%	0.0%	0.0%
Q1-2. Fire Inspections	70.2%	19.1%	6.4%	2.1%	0.0%	2.1%
Q1-3. Planning & Zoning	45.0%	20.0%	25.0%	10.0%	0.0%	0.0%
Q1-4. Code Enforcement	47.1%	17.6%	5.9%	23.5%	0.0%	5.9%
Q1-5. Police Patrol	65.7%	22.9%	5.7%	2.9%	0.0%	2.9%
Q1-6. Police Emergency Response	60.0%	28.0%	4.0%	0.0%	4.0%	4.0%
Q1-7. Fire Emergency Response	89.5%	10.5%	0.0%	0.0%	0.0%	0.0%
Q1-8. Village Hall (Front Desk)	65.0%	25.0%	10.0%	0.0%	0.0%	0.0%
Q1-9. Streets & Grounds	60.0%	30.0%	5.0%	5.0%	0.0%	0.0%

**WITHOUT "DON'T KNOW"**

**Q1. If "Yes," please rate the service or department using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied." (without "don't know")**

(N=68)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q1-1. Building Inspections	61.9%	33.3%	4.8%	0.0%	0.0%
Q1-2. Fire Inspections	71.7%	19.6%	6.5%	2.2%	0.0%
Q1-3. Planning & Zoning	45.0%	20.0%	25.0%	10.0%	0.0%
Q1-4. Code Enforcement	50.0%	18.8%	6.3%	25.0%	0.0%
Q1-5. Police Patrol	67.6%	23.5%	5.9%	2.9%	0.0%
Q1-6. Police Emergency Response	62.5%	29.2%	4.2%	0.0%	4.2%
Q1-7. Fire Emergency Response	89.5%	10.5%	0.0%	0.0%	0.0%
Q1-8. Village Hall (Front Desk)	65.0%	25.0%	10.0%	0.0%	0.0%
Q1-9. Streets & Grounds	60.0%	30.0%	5.0%	5.0%	0.0%

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

<u>Q2. Top choice</u>	<u>Number</u>	<u>Percent</u>
Building Inspections	3	4.0 %
Fire Inspections	8	10.7 %
Planning & Zoning	6	8.0 %
Code Enforcement	4	5.3 %
Police Patrol	19	25.3 %
Police Emergency Response	10	13.3 %
Fire Emergency Response	7	9.3 %
Village Hall (Front Desk)	2	2.7 %
Streets & Grounds	6	8.0 %
None chosen	10	13.3 %
Total	75	100.0 %

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

<u>Q2. 2nd choice</u>	<u>Number</u>	<u>Percent</u>
Building Inspections	5	6.7 %
Fire Inspections	5	6.7 %
Planning & Zoning	2	2.7 %
Code Enforcement	3	4.0 %
Police Patrol	8	10.7 %
Police Emergency Response	16	21.3 %
Fire Emergency Response	21	28.0 %
Village Hall (Front Desk)	2	2.7 %
Streets & Grounds	1	1.3 %
None chosen	12	16.0 %
Total	75	100.0 %



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

<u>Q2. 3rd choice</u>	<u>Number</u>	<u>Percent</u>
Building Inspections	2	2.7 %
Fire Inspections	6	8.0 %
Planning & Zoning	3	4.0 %
Code Enforcement	1	1.3 %
Police Patrol	10	13.3 %
Police Emergency Response	8	10.7 %
Fire Emergency Response	10	13.3 %
Village Hall (Front Desk)	3	4.0 %
Streets & Grounds	10	13.3 %
None chosen	22	29.3 %
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	10	13.3 %
Fire Inspections	19	25.3 %
Planning & Zoning	11	14.7 %
Code Enforcement	8	10.7 %
Police Patrol	37	49.3 %
Police Emergency Response	34	45.3 %
Fire Emergency Response	38	50.7 %
Village Hall (Front Desk)	7	9.3 %
Streets & Grounds	17	22.7 %
None chosen	10	13.3 %
Total	191	

**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	8	10.7 %
Higher than your expectations	21	28.0 %
Meets your expectations	33	44.0 %
Below your expectations	6	8.0 %
Significantly below your expectations	1	1.3 %
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	8	11.6 %
Higher than your expectations	21	30.4 %
Meets your expectations	33	47.8 %
Below your expectations	6	8.7 %
Significantly below your expectations	1	1.4 %
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	24.0%	22.7%	29.3%	10.7%	6.7%	6.7%
Q4-2. Availability of employee & customer parking around your business	30.7%	17.3%	29.3%	6.7%	5.3%	10.7%
Q4-3. Condition of sidewalks	22.7%	36.0%	13.3%	4.0%	2.7%	21.3%
Q4-4. Creating & promoting special events	34.7%	30.7%	16.0%	4.0%	2.7%	12.0%
Q4-5. Historic preservation efforts	34.7%	25.3%	14.7%	8.0%	2.7%	14.7%
Q4-6. Cleanliness of Village streets & public areas	54.7%	25.3%	10.7%	2.7%	2.7%	4.0%
Q4-7. Landscape maintenance in rights of way & public areas	50.7%	29.3%	9.3%	4.0%	2.7%	4.0%
Q4-8. Level of involvement in local decisions	16.0%	25.3%	26.7%	6.7%	8.0%	17.3%

**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	25.7%	24.3%	31.4%	11.4%	7.1%
Q4-2. Availability of employee & customer parking around your business	34.3%	19.4%	32.8%	7.5%	6.0%
Q4-3. Condition of sidewalks	28.8%	45.8%	16.9%	5.1%	3.4%
Q4-4. Creating & promoting special events	39.4%	34.8%	18.2%	4.5%	3.0%
Q4-5. Historic preservation efforts	40.6%	29.7%	17.2%	9.4%	3.1%
Q4-6. Cleanliness of Village streets & public areas	56.9%	26.4%	11.1%	2.8%	2.8%
Q4-7. Landscape maintenance in rights of way & public areas	52.8%	30.6%	9.7%	4.2%	2.8%
Q4-8. Level of involvement in local decisions	19.4%	30.6%	32.3%	8.1%	9.7%

**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	46.7%	32.0%	10.7%	5.3%	1.3%	4.0%
Q5-2. Overall quality of life	48.0%	34.7%	9.3%	1.3%	0.0%	6.7%
Q5-3. Overall feeling of safety	66.7%	28.0%	2.7%	1.3%	0.0%	1.3%
Q5-4. Quality of new commercial development in Village	21.3%	21.3%	32.0%	10.7%	2.7%	12.0%
Q5-5. Overall appearance of Village	50.7%	34.7%	6.7%	4.0%	1.3%	2.7%

**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	48.6%	33.3%	11.1%	5.6%	1.4%
Q5-2. Overall quality of life	51.4%	37.1%	10.0%	1.4%	0.0%
Q5-3. Overall feeling of safety	67.6%	28.4%	2.7%	1.4%	0.0%
Q5-4. Quality of new commercial development in Village	24.2%	24.2%	36.4%	12.1%	3.0%
Q5-5. Overall appearance of Village	52.1%	35.6%	6.8%	4.1%	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	23	30.7 %
Somewhat likely	11	14.7 %
Not likely	4	5.3 %
Not likely at all	4	5.3 %
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	23	31.9 %
Somewhat likely	11	15.3 %
Not likely	4	5.6 %
Not likely at all	4	5.6 %
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 today compared to two years ago

	Number	Percent
Better	32	42.7 %
No change, but good	23	30.7 %
No change, but poor	4	5.3 %
Worse	5	6.7 %
Don't know	11	14.7 %
Total	75	100.0 %

**WITHOUT "DON'T KNOW"**

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

Q7. Which following best describes overall business atmosphere in Village today compared to two years ago

	Number	Percent
Better	32	50.0 %
No change, but good	23	35.9 %
No change, but poor	4	6.3 %
Worse	5	7.8 %
Total	64	100.0 %

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

(N=75)

	Significantly better	Better	Same	Worse	No opinion
Q8-1. Overall quality of life	22.7%	24.0%	9.3%	4.0%	40.0%
Q8-2. Overall quality of Village services	16.0%	33.3%	4.0%	4.0%	42.7%
Q8-3. Customer service provided by Village employees	20.0%	20.0%	10.7%	1.3%	48.0%

**WITHOUT "NO OPINION"**

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

(N=75)

	Significantly better	Better	Same	Worse
Q8-1. Overall quality of life	37.8%	40.0%	15.6%	6.7%
Q8-2. Overall quality of Village services	27.9%	58.1%	7.0%	7.0%
Q8-3. Customer service provided by Village employees	38.5%	38.5%	20.5%	2.6%



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

Q9. How would you rate overall customer service of

Village	Number	Percent
Very good	27	36.0 %
Good	27	36.0 %
Poor	4	5.3 %
Don't know	17	22.7 %
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 overall customer service of

Village	Number	Percent
Very good	27	46.6 %
Good	27	46.6 %
Poor	4	6.9 %
Total	58	100.0 %

**Q10. Thinking about your MOST RECENT contact with Village government staff, please rate your experience using a scale of 1 to 5, where 5 means "Strongly Agree" and 1 means "Strongly Disagree."**

(N=75)

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Don't know
Q10-1. Village staff was responsive to my needs	25.3%	13.3%	12.0%	8.0%	0.0%	41.3%
Q10-2. Village staff was competent	24.0%	17.3%	12.0%	4.0%	0.0%	42.7%
Q10-3. Village staff was courteous	26.7%	24.0%	6.7%	2.7%	0.0%	40.0%
Q10-4. My issue was resolved promptly	21.3%	17.3%	10.7%	8.0%	1.3%	41.3%

**WITHOUT "DON'T KNOW"**

**Q10. Thinking about your MOST RECENT contact with Village government staff, please rate your experience using a scale of 1 to 5, where 5 means "Strongly Agree" and 1 means "Strongly Disagree." (without "don't know")**

(N=75)

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
Q10-1. Village staff was responsive to my needs	43.2%	22.7%	20.5%	13.6%	0.0%
Q10-2. Village staff was competent	41.9%	30.2%	20.9%	7.0%	0.0%
Q10-3. Village staff was courteous	44.4%	40.0%	11.1%	4.4%	0.0%
Q10-4. My issue was resolved promptly	36.4%	29.5%	18.2%	13.6%	2.3%

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

Q11. How satisfied are you with overall job Village does communicating with business owners

	Number	Percent
Very satisfied	13	17.3 %
Satisfied	25	33.3 %
Neutral	17	22.7 %
Dissatisfied	5	6.7 %
Very dissatisfied	5	6.7 %
Don't know	10	13.3 %
Total	75	100.0 %

**WITHOUT "DON'T KNOW"**

**Q11. Communication. Overall, how satisfied are you with the job the Village of Pinehurst does communicating with business owners? Would you say you are... (without "don't know")**

Q11. How satisfied are you with overall job Village does communicating with business owners

	Number	Percent
Very satisfied	13	20.0 %
Satisfied	25	38.5 %
Neutral	17	26.2 %
Dissatisfied	5	7.7 %
Very dissatisfied	5	7.7 %
Total	65	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	42	56.0 %
No	29	38.7 %
Don't know	4	5.3 %
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	42	59.2 %
No	29	40.8 %
Total	71	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=42)

	Very good	Good	Average	Poor	Very poor	Don't know
Q12a-1. Easy to navigate	21.4%	40.5%	33.3%	0.0%	2.4%	2.4%
Q12a-2. Availability of information about Village services	28.6%	33.3%	31.0%	4.8%	0.0%	2.4%

**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=42)

	Very good	Good	Average	Poor	Very poor
Q12a-1. Easy to navigate	22.0%	41.5%	34.1%	0.0%	2.4%
Q12a-2. Availability of information about Village services	29.3%	34.1%	31.7%	4.9%	0.0%

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

Q12b. How satisfied were you with Village website	Number	Percent
Very satisfied	10	23.8 %
Satisfied	14	33.3 %
Neutral	14	33.3 %
Dissatisfied	1	2.4 %
Don't know	3	7.1 %
Total	42	100.0 %

**WITHOUT "DON'T KNOW"**

**Q12b. Overall, how satisfied would you say you were with the Village of Pinehurst Website? Would you say you were... (without "don't know")**

Q12b. How satisfied were you with Village website	Number	Percent
Very satisfied	10	25.6 %
Satisfied	14	35.9 %
Neutral	14	35.9 %
Dissatisfied	1	2.6 %
Total	39	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	10	13.3 %
No	65	86.7 %
Total	75	100.0 %

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

Q13a. How satisfied were you with Village mobile app, MY VOP	Number	Percent
Very satisfied	3	30.0 %
Satisfied	3	30.0 %
Neutral	2	20.0 %
Dissatisfied	2	20.0 %
Total	10	100.0 %

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

Q14. What are the best ways for Village to communicate with you to get important information to your business	Number	Percent
Direct mail	25	33.3 %
Village website	15	20.0 %
Email (monthly business eNews)	46	61.3 %
Workshops/business forums	6	8.0 %
Social media	18	24.0 %
Personal calls/visits	12	16.0 %
Newsletters	18	24.0 %
Brochures	2	2.7 %
MY VOP mobile app	2	2.7 %
Engage Pinehurst online engagement portal (engage.vopnc.org)	3	4.0 %
Total	147	

**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	6.7%	32.0%	30.7%	6.7%	2.7%	21.3%
Q15-2. Business signage regulations	14.7%	24.0%	28.0%	10.7%	5.3%	17.3%
Q15-3. Historic district guidelines	24.0%	25.3%	21.3%	6.7%	0.0%	22.7%

**WITHOUT "DON'T KNOW"**

**Q15. Community Development. Using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied," please indicate how satisfied your business is with the following Village codes and ordinances. (without "don't know")**

(N=75)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q15-1. Zoning ordinances	8.5%	40.7%	39.0%	8.5%	3.4%
Q15-2. Business signage regulations	17.7%	29.0%	33.9%	12.9%	6.5%
Q15-3. Historic district guidelines	31.0%	32.8%	27.6%	8.6%	0.0%

**Q16. Village Events. Using a scale of 1 to 3, where 3 means "Positive Impact" and 1 means "Negative Impact," please indicate the impact the following events in the Village Center have on your business.**

(N=75)

	Positive impact	No impact	Negative impact	Don't know
Q16-1. Farmer's Markets	34.7%	54.7%	1.3%	9.3%
Q16-2. Live After Five Concerts	33.3%	56.0%	4.0%	6.7%
Q16-3. Parades (e.g., Fourth of July, St. Patrick's Day, US Kids)	40.0%	49.3%	2.7%	8.0%
Q16-4. Holly Arts & Crafts Festival	41.3%	42.7%	6.7%	9.3%
Q16-5. Tree Lighting	36.0%	54.7%	0.0%	9.3%
Q16-6. Shakespeare in the Pines	26.7%	58.7%	0.0%	14.7%
Q16-7. Sandhills Motoring Festival	29.3%	56.0%	1.3%	13.3%
Q16-8. Other cultural activities (e.g., performing arts)	38.7%	48.0%	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. Farmer's Markets	38.2%	60.3%	1.5%
Q16-2. Live After Five Concerts	35.7%	60.0%	4.3%
Q16-3. Parades (e.g., Fourth of July, St. Patrick's Day, US Kids)	43.5%	53.6%	2.9%
Q16-4. Holly Arts & Crafts Festival	45.6%	47.1%	7.4%
Q16-5. Tree Lighting	39.7%	60.3%	0.0%
Q16-6. Shakespeare in the Pines	31.3%	68.8%	0.0%
Q16-7. Sandhills Motoring Festival	33.8%	64.6%	1.5%
Q16-8. Other cultural activities (e.g., performing arts)	44.6%	55.4%	0.0%

**Q17. Please indicate how satisfied you are with the way the Village handles events that attract large crowds to the Village (e.g. considering the needs of businesses, addressing noise and disturbance issues)?**

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

	Number	Percent
Very satisfied	27	36.0 %
Satisfied	22	29.3 %
Neutral	12	16.0 %
Dissatisfied	4	5.3 %
Very dissatisfied	2	2.7 %
Don't know	8	10.7 %
Total	75	100.0 %

**WITHOUT "DON'T KNOW"**

**Q17. Please indicate how satisfied you are with the way the Village handles events that attract large crowds to the Village (e.g. considering the needs of businesses, addressing noise and disturbance issues)? (without "don't know")**

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

	Number	Percent
Very satisfied	27	40.3 %
Satisfied	22	32.8 %
Neutral	12	17.9 %
Dissatisfied	4	6.0 %
Very dissatisfied	2	3.0 %
Total	67	100.0 %

**Q18. Welcome Center. Please rate your level of agreement with the following statement: The Village of Pinehurst Welcome Center brings added value to my business.**

Q18. Village of Pinehurst Welcome Center brings added value to my business	Number	Percent
Strongly agree	14	18.7 %
Agree	6	8.0 %
Neutral	27	36.0 %
Disagree	6	8.0 %
Don't know	22	29.3 %
Total	75	100.0 %

**WITHOUT "DON'T KNOW"**

**Q18. Welcome Center. Please rate your level of agreement with the following statement: The Village of Pinehurst Welcome Center brings added value to my business. (without "don't know")**

Q18. Village of Pinehurst Welcome Center brings added value to my business	Number	Percent
Strongly agree	14	26.4 %
Agree	6	11.3 %
Neutral	27	50.9 %
Disagree	6	11.3 %
Total	53	100.0 %

**Q19. 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
Q19-1. Overall image of Village	44.0%	25.3%	13.3%	2.7%	5.3%	9.3%
Q19-2. Safety & security	56.0%	24.0%	6.7%	2.7%	4.0%	6.7%
Q19-3. Availability of trained employees	34.7%	22.7%	12.0%	8.0%	8.0%	14.7%
Q19-4. Low property tax rate	37.3%	16.0%	16.0%	12.0%	6.7%	12.0%
Q19-5. Quality healthcare	50.7%	18.7%	9.3%	4.0%	6.7%	10.7%
Q19-6. Affordable rent	30.7%	21.3%	13.3%	8.0%	13.3%	13.3%
Q19-7. Proximity to family or friends	24.0%	30.7%	13.3%	8.0%	13.3%	10.7%
Q19-8. Quality of public education	50.7%	14.7%	9.3%	5.3%	8.0%	12.0%
Q19-9. Overall quality of life in Village	49.3%	26.7%	8.0%	4.0%	4.0%	8.0%

**WITHOUT "NOT PROVIDED"**

**Q19. 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
Q19-1. Overall image of Village	48.5%	27.9%	14.7%	2.9%	5.9%
Q19-2. Safety & security	60.0%	25.7%	7.1%	2.9%	4.3%
Q19-3. Availability of trained employees	40.6%	26.6%	14.1%	9.4%	9.4%
Q19-4. Low property tax rate	42.4%	18.2%	18.2%	13.6%	7.6%
Q19-5. Quality healthcare	56.7%	20.9%	10.4%	4.5%	7.5%
Q19-6. Affordable rent	35.4%	24.6%	15.4%	9.2%	15.4%
Q19-7. Proximity to family or friends	26.9%	34.3%	14.9%	9.0%	14.9%
Q19-8. Quality of public education	57.6%	16.7%	10.6%	6.1%	9.1%
Q19-9. Overall quality of life in Village	53.6%	29.0%	8.7%	4.3%	4.3%

**Q20. In the next THREE years, is your business planning to do any of the following?**

Q20. What is your business planning to do in next three years	Number	Percent
Expanding/renovating your facility in its current location	14	18.7 %
Relocating to another location in Village of Pinehurst	3	4.0 %
Relocating to another location outside Village of Pinehurst	5	6.7 %
Decreasing employment	1	1.3 %
Increasing employment	22	29.3 %
Closing	1	1.3 %
No plans at present to do any of these	41	54.7 %
Total	87	

**Q20-2. Where is your business planning to relocate to another location in the Village of Pinehurst?**

Q20-2. Where	Number	Percent
Still looking	1	33.3 %
Not decided	1	33.3 %
Don't know yet	1	33.3 %
Total	3	100.0 %

**Q20-2. Why is your business planning to relocate to another location in the Village of Pinehurst?**

Q20-2. Why	Number	Percent
Larger space	1	33.3 %
Lease is up	1	33.3 %
Cost savings	1	33.3 %
Total	3	100.0 %

**Q20-3. What city/where is your business planning to relocate to another location outside the Village of Pinehurst?**

<u>Q20-3. What city/where</u>	<u>Number</u>	<u>Percent</u>
Not sure	2	40.0 %
Rural Moore County	1	20.0 %
Southern Pines	1	20.0 %
Not Pinehurst	1	20.0 %
Total	5	100.0 %

**Q20-3. Why is your business planning to relocate to another location outside the Village of Pinehurst?**

<u>Q20-3. Why</u>	<u>Number</u>	<u>Percent</u>
Restrictive covenants	1	20.0 %
In home business moving due to lack of affordable	1	20.0 %
Some place where residents/Government support tourism	1	20.0 %
Will move and cease paying taxes to octogenarians to make decisions	1	20.0 %
Building space needs	1	20.0 %
Total	5	100.0 %

**Q20-4. Please indicate the anticipated number of layoffs:**

<u>Q20-4. Anticipated number of layoffs</u>	<u>Number</u>	<u>Percent</u>
2	1	100.0 %
Total	1	100.0 %

**Q20-5. Please indicate the anticipated number of new hires:**

<u>Q20-5. Anticipated number of new hires</u>	<u>Number</u>	<u>Percent</u>
2	5	33.3 %
3	3	20.0 %
5	2	13.3 %
7	1	6.7 %
6	1	6.7 %
1	1	6.7 %
4	1	6.7 %
10	1	6.7 %
Total	15	100.0 %

**Q20-5. Please indicate the HOURLY Wage Level:**

<u>Q20-5. Hourly wage level</u>	<u>Number</u>	<u>Percent</u>
15	4	36.4 %
25	2	18.2 %
20	1	9.1 %
23	1	9.1 %
12	1	9.1 %
10	1	9.1 %
11	1	9.1 %
Total	11	100.0 %

**Q20-6. Why is your business planning to close?**

<u>Q20-6. Why closing</u>	<u>Number</u>	<u>Percent</u>
Retirement	1	100.0 %
Total	1	100.0 %



**Q21. What are the most important issues facing Pinehurst today?**

- Added buildings and renovations seems like running out of room, need more land.
- Affordable rent.
- Attention to the Central District by Admin/Council; cleaning Central Village up and improving the look, feel and function; enforcement of parking matters; Senior Admin to take an interest in the Central District and be visible in the CD
- Balancing growth with preserving the historical integrity of The Village.
- Clean the traffic intersections
- Clean up downtown
- Controlling growth and traffic.
- Curbing vacation rentals.
- Expansion, population increase and short term rentals.
- Great Staff - Terrible Leadership - Banning of STRS will make it impossible to make a profit because tourism is 65% of my business, and this city government hates tourism, and we are a tourism destination
- Growth
- Growth and zoning.
- Growth will occur, it just needs to be managed properly.
- Handling growth, need to give a little.
- Housing price is too high to attract blue collar works to work here. They have to drive far to come to work. Therefore the wages have to increase.
- It is rocky getting employees.
- Keeping the business growth and family growth separated.
- Lack of progress due to poor, non-flexible leadership. Stuck in a past that does not exist.
- Manage growth, you are growing too fast.
- Need available facilities for young families and teens.
- No STR in my neighborhood.
- Overpopulation/growth
- Parking
- Parking and expanding the main center to allow more growth for restaurants and shops. A parking deck would be really useful and then you could close Chinqapin and Market and make it a pedestrian mall.
- Parks and rec are doing a great job.
- Paying fees, fines and bills online should be easier.
- Probably the council. Not a great place to live and raise kids with them making decisions on behalf of their generation and their generation only.
- Protecting it from becoming Myrtle Beach!
- Public parking
- Short term rentals and banning them. Should not ban them.
- Short term rentals.
- Space and growth opportunities and infrastructure.
- Stop allowing residents to build in right of ways.
- The current move towards removing STRs will be a major negative for my business. It will require a staff reduction for my business.
- The Village Council (not the staff) has an anti-business bias.
- The Village council needs to back off on the short term rental issue. Banning them would be bad for business.

**Q21. What are the most important issues facing Pinehurst today?**

- The Welcome Center inside the Theater Building seems closed during some peak hours and days.
- Traffic
- Traffic
- Traffic .. lack of basic necessities
- Traffic All around Pinehurst!
- Traffic and planning
- Wokeness is the dominant threat to our way of life. It seeks to destroy the just, tranquil peace we enjoy and ruin opportunity for everyone, regardless of ethnicity.
- Zoning-short term rentals.

**Q22. Do you have any suggestions for how the Village could serve your business better?**

- Change with times or change leadership. Stop letting the resort dictate decisions.
- Easier to do business online, get applications, etc.
- Enforcement of no parking on main streets by employees; Promotion of Day-Trippers to VOP; Include business principals on key decisions made in the village
- Expand roads and move rail line to rural area. Highway 5 is choked 3 times a day. Cannot widen with train tracks having a preference.
- Fix the pot holes on Memorial Drive.
- Have low income apartment near by
- Have more direct communication.
- Keep the roads open during events so the anchor businesses don't close and leave.
- Need more information about what subdivisions are coming to the area.
- Need public trash service.
- Need street lights and street signs
- Need to resurface roads, Clean up corners where debris has settled. Allow residents to rent their homes with some restrictions. Issue permits.
- Parking
- Parking problems, object to not being able to park outside my office.
- Police come back on Friday's to bank.
- Regulate vacation rentals.
- Support tourists
- To be more accurate in describing local businesses, for example, when The Village advertised their booth for the Holly Fest they stated it would be in front of the Roast Office. The Given Tufts Bookshop leases the building while the RO sub leases, and more importantly the proceeds from the Given Tufts Bookshop go to support The Village's Library and Archives.
- US open full tent cities were not good for small businesses not letting people park in driveways. Fire inspectors charge too much!
- Vote in all new council with an age limit of 65
- We need leaders who understand this is a tourism destination, and we don't!
- Yes, do nothing to curtail the liberties and rights we currently enjoy. This includes short term and long term rentals within the village.

**Q23. Business Category. Please indicate the primary business category of your business.**

Q23. Primary business category for your business	Number	Percent
Retail	9	12.0 %
Restaurants & food services	6	8.0 %
Inn & lodging accommodations	2	2.7 %
Professional, scientific, & technical services	9	12.0 %
Financial & insurance	6	8.0 %
Real estate & rental leasing	9	12.0 %
Health care & social assistance	20	26.7 %
Arts, entertainment, & recreation	6	8.0 %
Other	8	10.7 %
Total	75	100.0 %

**Q23-9. Other**

Q23-9. Other	Number	Percent
Church	2	40.0 %
Educational/cultural	1	20.0 %
Wholesale plumbing and showroom	1	20.0 %
Horse stables	1	20.0 %
Total	5	100.0 %

**Q24. How many years have you been in operation in the Village of Pinehurst?**

Q24. How many years have you been in operation in Village of Pinehurst	Number	Percent
0-5 years	10	13.3 %
6-10 years	13	17.3 %
11-15 years	6	8.0 %
16-20 years	5	6.7 %
20+ years	39	52.0 %
Not provided	2	2.7 %
Total	75	100.0 %

**WITHOUT "NOT PROVIDED"****Q24. How many years have you been in operation in the Village of Pinehurst? (without "not provided")**

Q24. How many years have you been in operation in Village of Pinehurst	Number	Percent
0-5 years	10	13.7 %
6-10 years	13	17.8 %
11-15 years	6	8.2 %
16-20 years	5	6.8 %
20+ years	39	53.4 %
Total	73	100.0 %

**Q25. Approximately how many employees does your organization employ in the Village of Pinehurst?**

Q25. How many employees does your organization employ in Village of Pinehurst	Number	Percent
Less than 10	40	53.3 %
10-24	17	22.7 %
25-49	6	8.0 %
50-99	5	6.7 %
100-249	2	2.7 %
250-499	1	1.3 %
Not provided	4	5.3 %
Total	75	100.0 %

**WITHOUT "NOT PROVIDED"****Q25. Approximately how many employees does your organization employ in the Village of Pinehurst? (without "not provided")**

Q25. How many employees does your organization employ in Village of Pinehurst	Number	Percent
Less than 10	40	56.3 %
10-24	17	23.9 %
25-49	6	8.5 %
50-99	5	7.0 %
100-249	2	2.8 %
250-499	1	1.4 %
Total	71	100.0 %

**Q26. Is your personal residence in the Village of Pinehurst?**

Q26. Is your personal residence in Village of Pinehurst	Number	Percent
Yes	41	54.7 %
No	33	44.0 %
Not provided	1	1.3 %
Total	75	100.0 %

**WITHOUT "NOT PROVIDED"****Q26. Is your personal residence in the Village of Pinehurst? (without "not provided")**

Q26. Is your personal residence in Village of Pinehurst	Number	Percent
Yes	41	55.4 %
No	33	44.6 %
Total	74	100.0 %

**Q27. Please answer the following questions.**

(N=75)

	Yes	No	Not provided
Q27-1. Are you a member of Pinehurst Business Partners	20.0%	72.0%	8.0%
Q27-2. Are you a member of Moore County Chamber of Commerce	36.0%	54.7%	9.3%
Q27-3. Is your business located in Village Center	24.0%	69.3%	6.7%

**WITHOUT "NOT PROVIDED"****Q27. Please answer the following questions. (without "not provided")**

(N=75)

	Yes	No
Q27-1. Are you a member of Pinehurst Business Partners	21.7%	78.3%
Q27-2. Are you a member of Moore County Chamber of Commerce	39.7%	60.3%
Q27-3. Is your business located in Village Center	25.7%	74.3%

A graphic consisting of a white circle with a dark blue outline containing the number '4', followed by a dark blue horizontal bar containing the text 'Survey Instrument' in white.

# 4 Survey Instrument



HISTORY, CHARM, AND SOUTHERN HOSPITALITY \_\_\_\_\_

**August 2022**

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 [2022PinehurstBusinessSurvey.org](https://2022PinehurstBusinessSurvey.org).**

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 October. 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 2022 Business Survey.

Sincerely,

Jeffrey M. Sanborn  
Village Manager

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ADMINISTRATION

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



## 2022 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](mailto: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...**

____(5) Significantly higher than your expectations	____(2) Below your expectations
____(4) Higher than your expectations	____(1) 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?**

(5) Very likely                       (3) Somewhat likely                       (1) Not likely at all  
 (4) Likely                                       (2) 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?**

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

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

(5) Very satisfied                                       (3) Neutral                                       (1) Very dissatisfied  
 (4) Satisfied                                       (2) 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...**

\_\_\_(5) Very satisfied      \_\_\_(3) Neutral      \_\_\_(1) Very dissatisfied  
 \_\_\_(4) Satisfied      \_\_\_(2) 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...**

\_\_\_(5) Very satisfied      \_\_\_(3) Neutral      \_\_\_(1) Very dissatisfied  
 \_\_\_(4) Satisfied      \_\_\_(2) 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
- \_\_\_(02) Village website
- \_\_\_(03) Email (Monthly Business eNews)
- \_\_\_(04) Workshops/Business forums
- \_\_\_(05) Social media
- \_\_\_(06) Personal calls/visits
- \_\_\_(07) Newsletters
- \_\_\_(08) Brochures
- \_\_\_(09) MY VOP mobile app
- \_\_\_(10) Engage Pinehurst online engagement portal (engage.vopnc.org)
- \_\_\_(11) Other: \_\_\_\_\_

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

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

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

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

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

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

18. **Welcome Center.** Please rate your level of agreement with the following statement: **The Village of Pinehurst Welcome Center brings added value to my business.**

(5) Strongly agree                       (3) Neutral                       (1) Strongly disagree  
 (4) Agree                                       (2) Disagree                       (9) Don't know

19. 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

20. In the next THREE years, is your business planning to do any of the following? [Check all that apply.]

- (1) Expanding/renovating your facility in its current location
- (2) Relocating to another location in the Village of Pinehurst  
(Where? \_\_\_\_\_ Why? \_\_\_\_\_)
- (3) Relocating to another location outside the Village of Pinehurst  
(What city/where? \_\_\_\_\_ Why? \_\_\_\_\_)
- (4) Decreasing employment; Please indicate the anticipated number of layoffs: \_\_\_\_\_
- (5) Increasing employment; Please indicate the anticipated number of new hires: \_\_\_\_\_ HOURLY Wage Level: \_\_\_\_\_
- (6) Closing (Why? \_\_\_\_\_)
- (7) No plans at present to do any of these

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

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

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

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

**24. 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

**25. Approximately how many employees does your organization employ in the Village of Pinehurst?**

- |   |                                    |                                      |  |
|---|------------------------------------|--------------------------------------|--|
| <input type="checkbox"/> (1) Less than 10 | <input type="checkbox"/> (3) 25-49 | <input type="checkbox"/> (5) 100-249 | <input type="checkbox"/> (7) 500 or more |
| <input type="checkbox"/> (2) 10-24        | <input type="checkbox"/> (4) 50-99 | <input type="checkbox"/> (6) 250-499 |  |

**26. Is your personal residence in the Village of Pinehurst?**     (1) Yes     (2) No

**27. 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.