



2023 Village of Pinehurst Business Survey Findings Report

Presented to the Village of Pinehurst,
North Carolina

September 2023



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Executive Summary

2023 Village of Pinehurst Business Survey

Executive Summary



Purpose and Methodology

ETC Institute administered a survey to businesses in the Village of Pinehurst during the summer of 2023. The survey was conducted for the eleventh 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 a sample of businesses in the Village of Pinehurst. The cover letter explained the purpose of the survey and encouraged business leaders to either return their survey by mail or complete the survey online. Ten days after the surveys were mailed, ETC Institute sent emails and placed phone calls to the businesses that received the survey to encourage participation. The emails contained a link to the on-line version of the survey to make it easy for businesses to complete the survey. A total of 75 completed surveys were collected from businesses in the Village of Pinehurst.

The percentage of "don't know" responses has been excluded from many of the graphs shown in this report to be consistent with the presentation of the resident responses. Since the number of "don't know" responses often reflects the utilization and awareness of services, the percentage of "don't know" responses has been provided in the tabular data section of this report. When the "don't know" responses have been excluded, the text of this report will indicate that the responses have been excluded with the phrase "who had an opinion."

This report contains:

- an executive summary of the methodology for administering the survey and major findings,
- charts and graphs for each question on the survey, including short-term and long-term trend comparisons (Section 1),
- Importance-Satisfaction analysis that shows priority actions for the Village to address based on the survey results (Section 2),
- tables that show the results for each question on the survey (Section 3),
- a copy of the survey instrument (Section 4).

2023 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 (64%), police patrol (47%), police emergency response (27%), and building inspections (24%).

Satisfaction with Village Services and Departments. The services that had the highest levels of satisfaction from businesses who had an opinion were: fire emergency response (100%), Village Hall (front desk) (100%), police patrol (94%), and police emergency response (90%).

Most Important Village Services. Based on the sum of their top three choices, the areas that businesses rated as most important were: 1) police emergency response (56%), 2) fire emergency response (53%), and police patrol (51%).

Satisfaction with the Overall Quality of Village Services. Fifty-six percent (56%) of the businesses surveyed feel the overall quality of services provided by the Village meets their expectations; 27% feel the overall quality of Village services is higher or significantly higher than their expectations. Only 10% feel the overall quality of Village services is below their expectations.

Satisfaction with Various Village Services. Eighty percent (80%) 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; 78% were satisfied with the cleanliness of streets and public areas, and 73% were satisfied with historic preservation efforts.

Perceptions of the Village. All businesses surveyed (100%) who had an opinion indicated that they were satisfied with the overall feeling of safety in the Village; 95% were satisfied with the overall appearance of the Village, and 89% were satisfied with the overall image of the Village.

Likelihood of Recommending the Village as a Business Location. Sixty-eight percent (68%) of businesses would be very likely or likely to recommend the Village as a business location to friends, family and co-workers; 20% 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. Thirty-one percent (31%) of businesses feel the overall business atmosphere in the Village is better than two years ago; 44% feel there has been no change, but the atmosphere is good, and 11% feel the atmosphere is worse.

Village Customer Service. Seventy-three percent (73%) of businesses rated the customer service from the Village as very good or good, compared to only 4% who rated the customer service from the Village as poor.

2023 Village of Pinehurst Business Survey

Executive Summary



Level of Agreement with Statements About Customer Service from Village Staff. Eighty-eight percent (88%) of the businesses surveyed who had an opinion agreed that the Village staff was courteous during their most recent interaction with them; 86% also agreed that Village staff was competent, 76% agreed that the staff was responsive to their needs, and 63% agreed that their issue was resolved promptly.

Satisfaction with Village Communications with Businesses. Forty-seven percent (47%) of businesses were satisfied with the job the Village does communicating with business owners, compared to 24% who were dissatisfied.

Village Website. Of the 55% of business that visited the Village’s website (www.vopnc.org) during the past 12 months, 61% who had an opinion felt the website was easy to navigate, and 61% rated the availability of information on Village services on the website as “very good” or “good.” Overall, 70% of those who have visited the Village’s website indicated they were either “very satisfied” or “satisfied” with the website.

Village Mobile App. Eight percent (8%) of businesses indicated they used the Village’s mobile app (MY VOP) during the past 12 months; 83% of those who have used it indicated they were “very satisfied” or “satisfied.”

Best Ways to Communicate with Businesses. Sixty-five percent (65%) of businesses indicated that email is one of the best ways for the Village to communicate with them.

Community Development (Codes and Ordinances). Seventy percent (70%) of the businesses who had an opinion were satisfied with historic district guidelines; 56% were satisfied with business signage regulations, and 55% were satisfied with zoning ordinances.

Impact of Various Cultural and Entertainment Opportunities. Fifty-six percent (56%) of the businesses surveyed feel Holly Arts & Crafts Festival in the Village Center has a positive impact on their business; 55% feel farmer’s markets have a positive impact; 54% feel tree lighting has a positive impact on their business, and 53% feel the Sandhills Motoring Festival has a positive impact on their business.

Value of Village of Pinehurst Welcome Center. Thirty-seven percent (37%) of businesses strongly agree or agree with the statement, “*The Village of Pinehurst Welcome Center brings added value to my business;*” 36% are neutral, 12% disagree with this statement, and 15% do not have an opinion.

Satisfaction with the Way the Village Handles Events That Attract Large Crowds. Sixty-seven percent (67%) of businesses are satisfied with the way the Village handles events that attract large crowds, compared to 12% who are dissatisfied.

2023 Village of Pinehurst Business Survey

Executive Summary



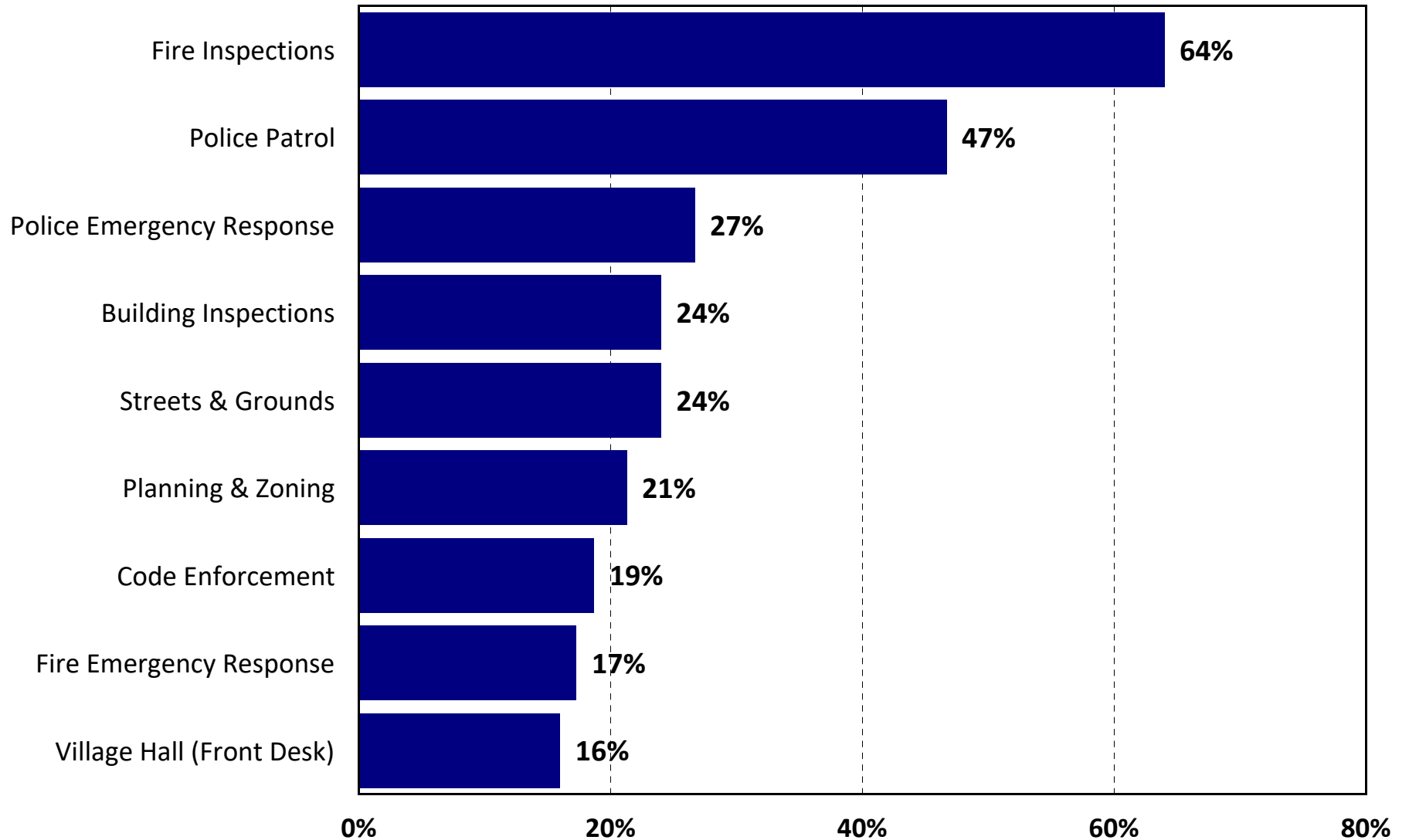
Reasons Influencing Decision to Locate Business in the Village of Pinehurst. Ninety-four percent (94%) of businesses surveyed indicated that overall quality of life in the Village was either “extremely important” or “very important” in their decision to locate their business in the Village of Pinehurst. Other top reasons included: safety and security (92%) and overall image of the Village (84%).



Charts and Graphs

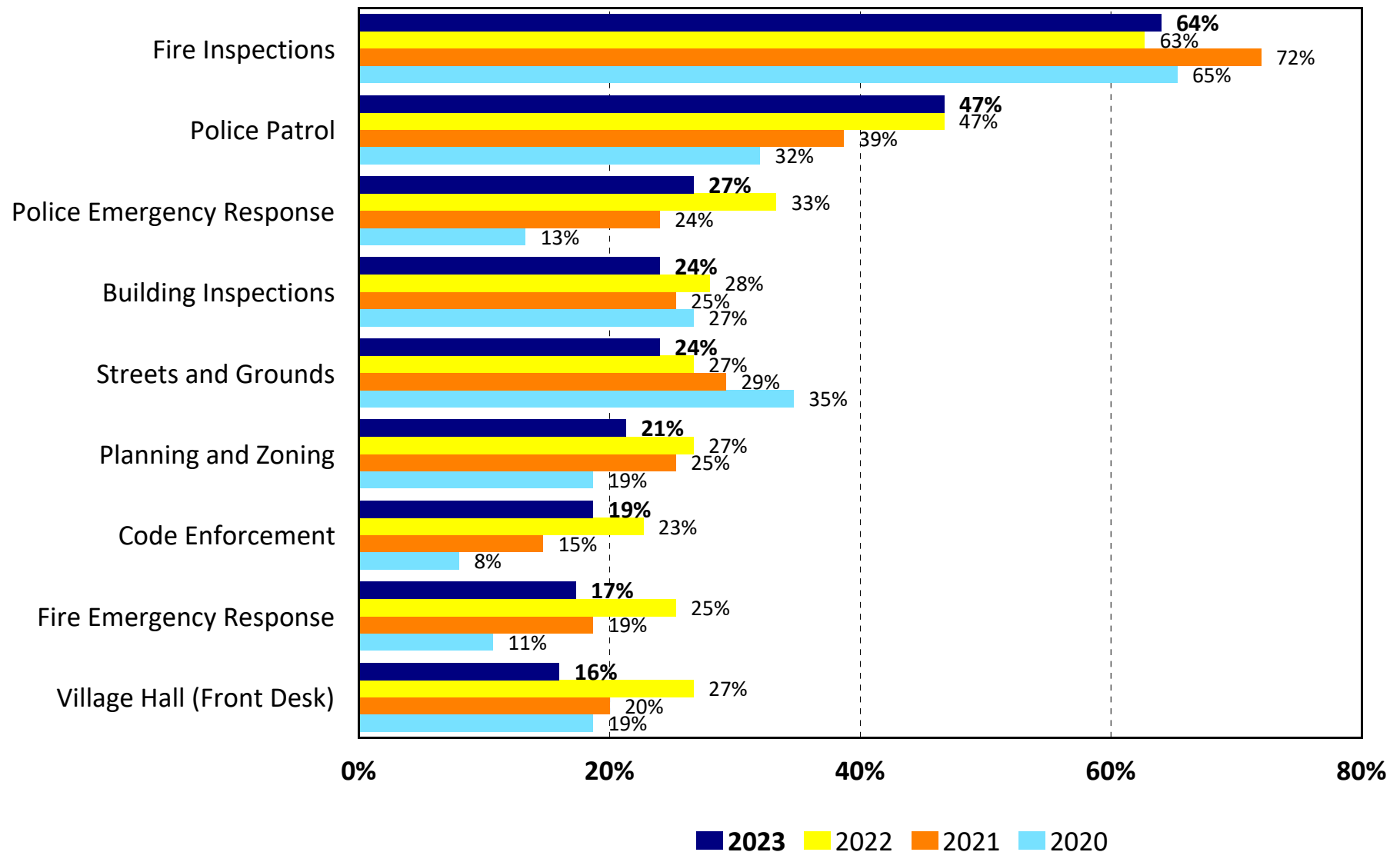
Q1. Have you used this service or department in the past year?

by percentage of respondents who answered “yes”



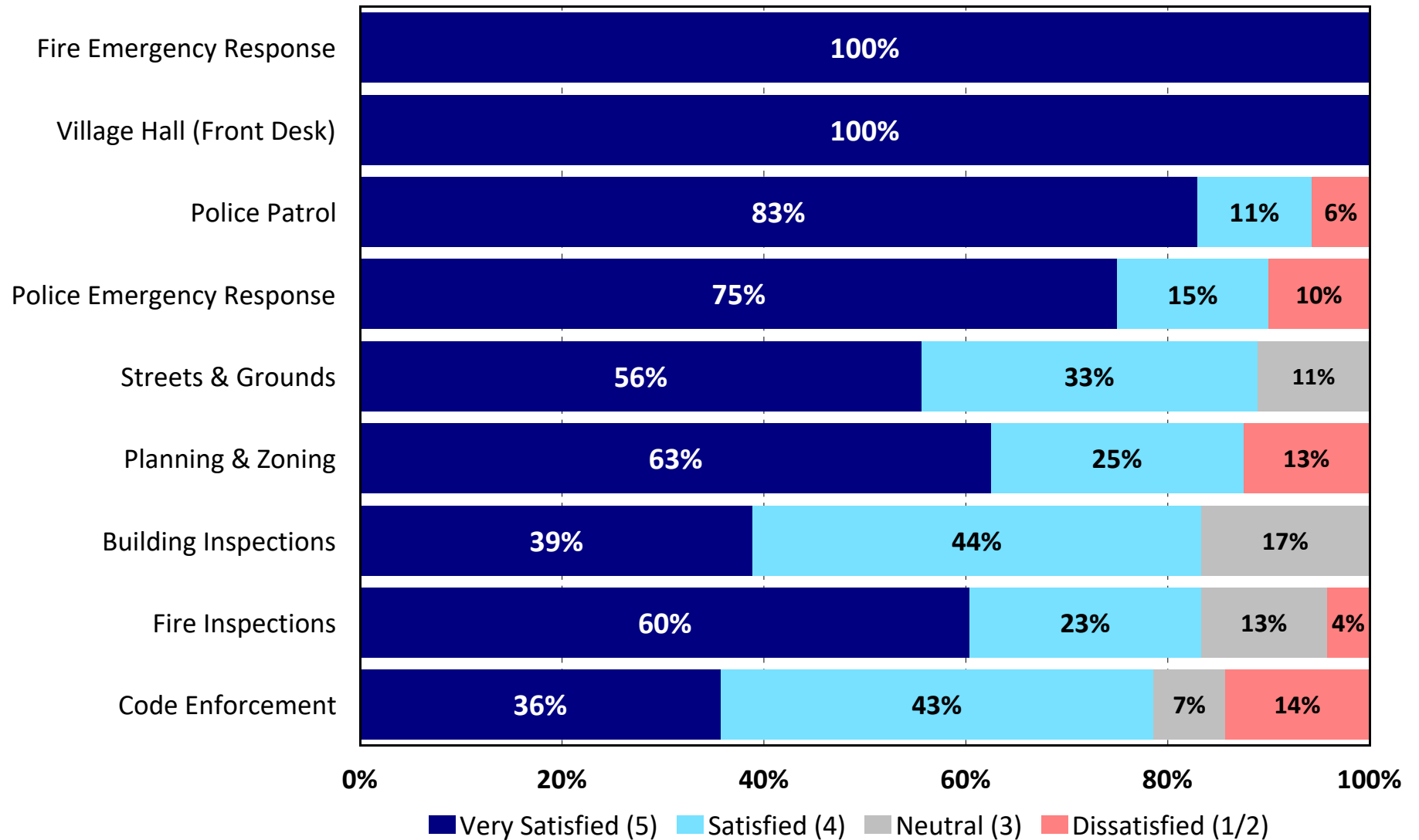
Q1. Have you used this service or department in the past year? - 2020 to 2023

by percentage of respondents who answered "yes"



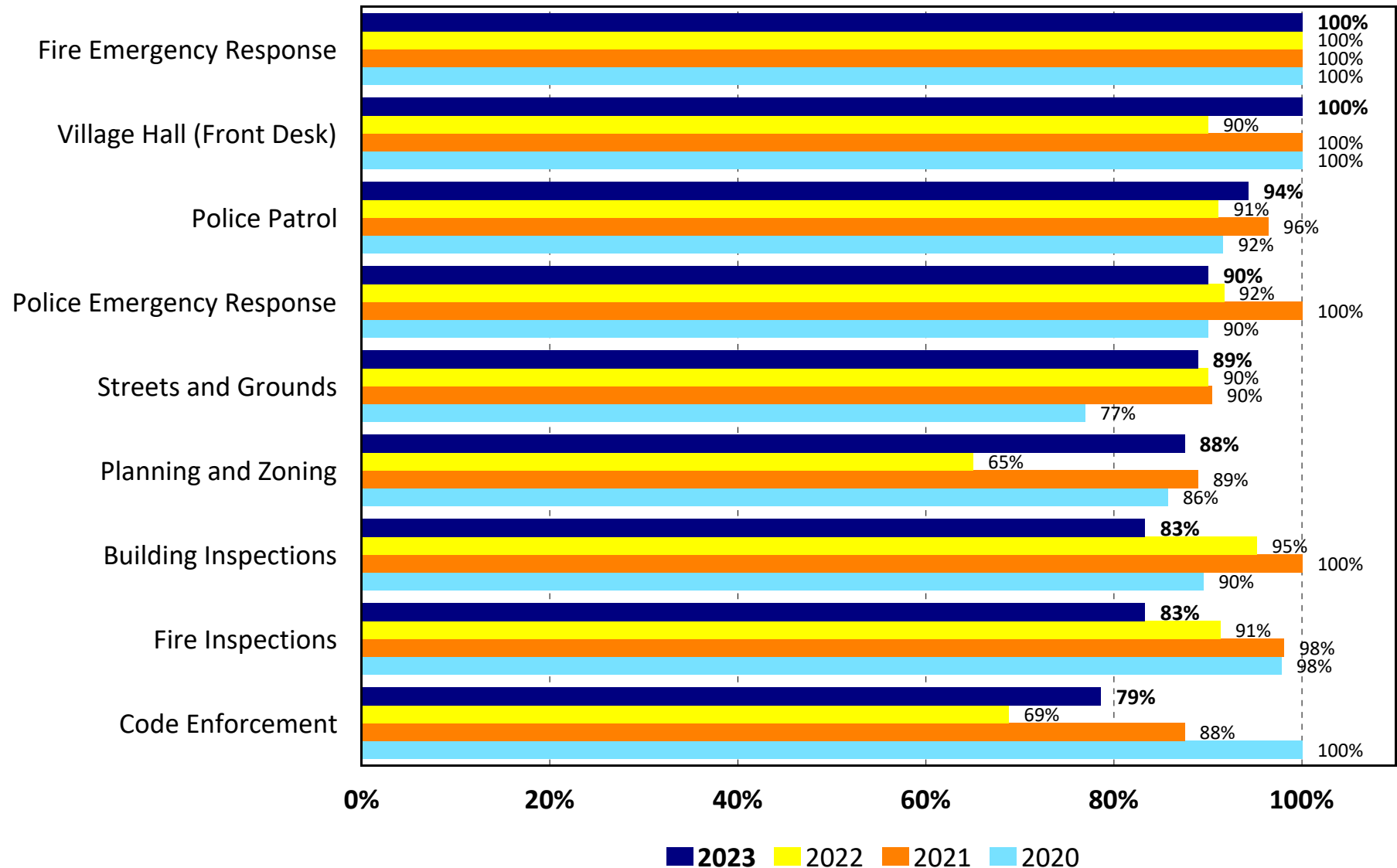
Q1. Overall Satisfaction with Pinehurst Services or Departments Used in the Past Year

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")



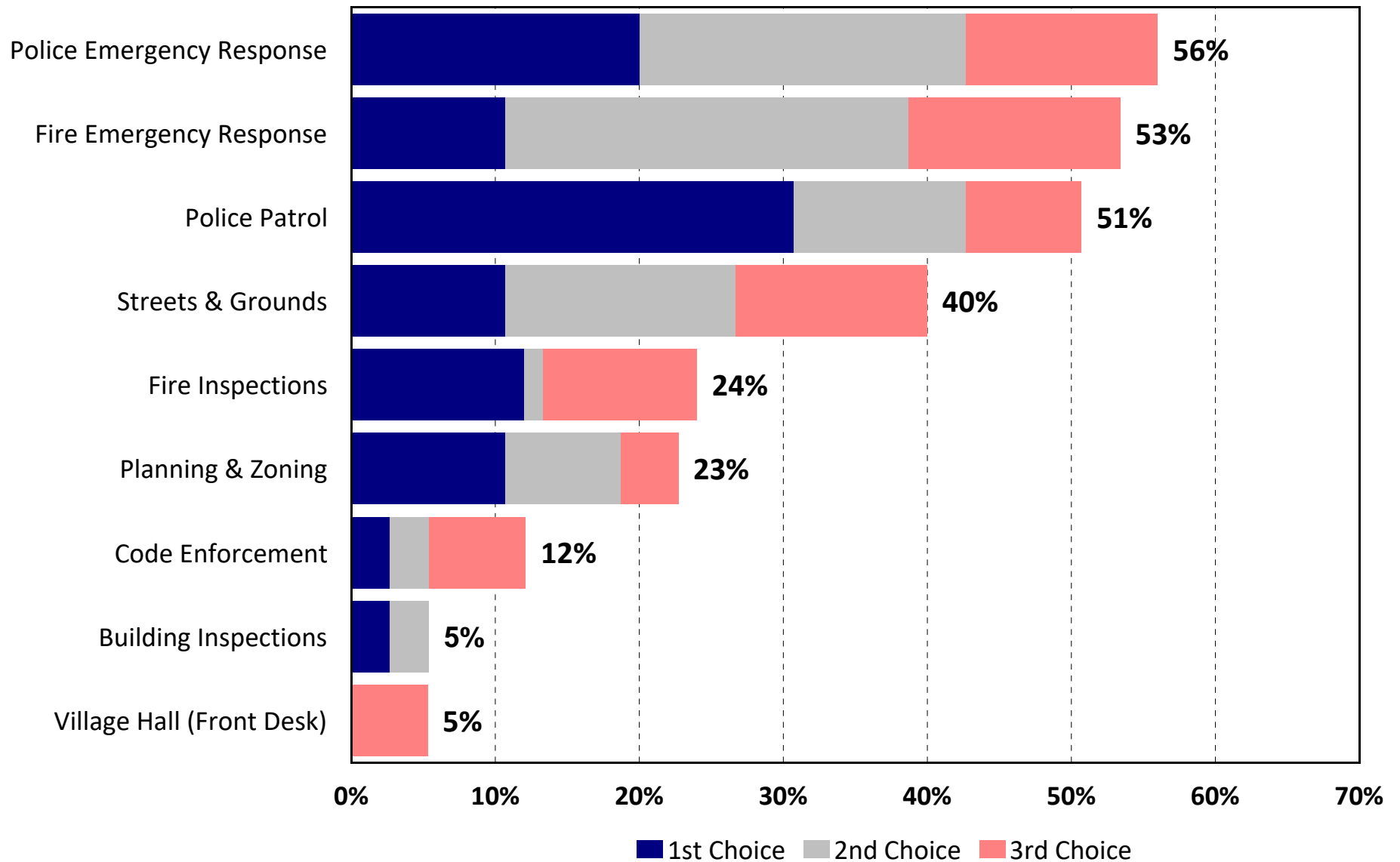
Q1. Overall Satisfaction with Pinehurst Services or Departments Used in the Past Year - 2020 to 2023

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



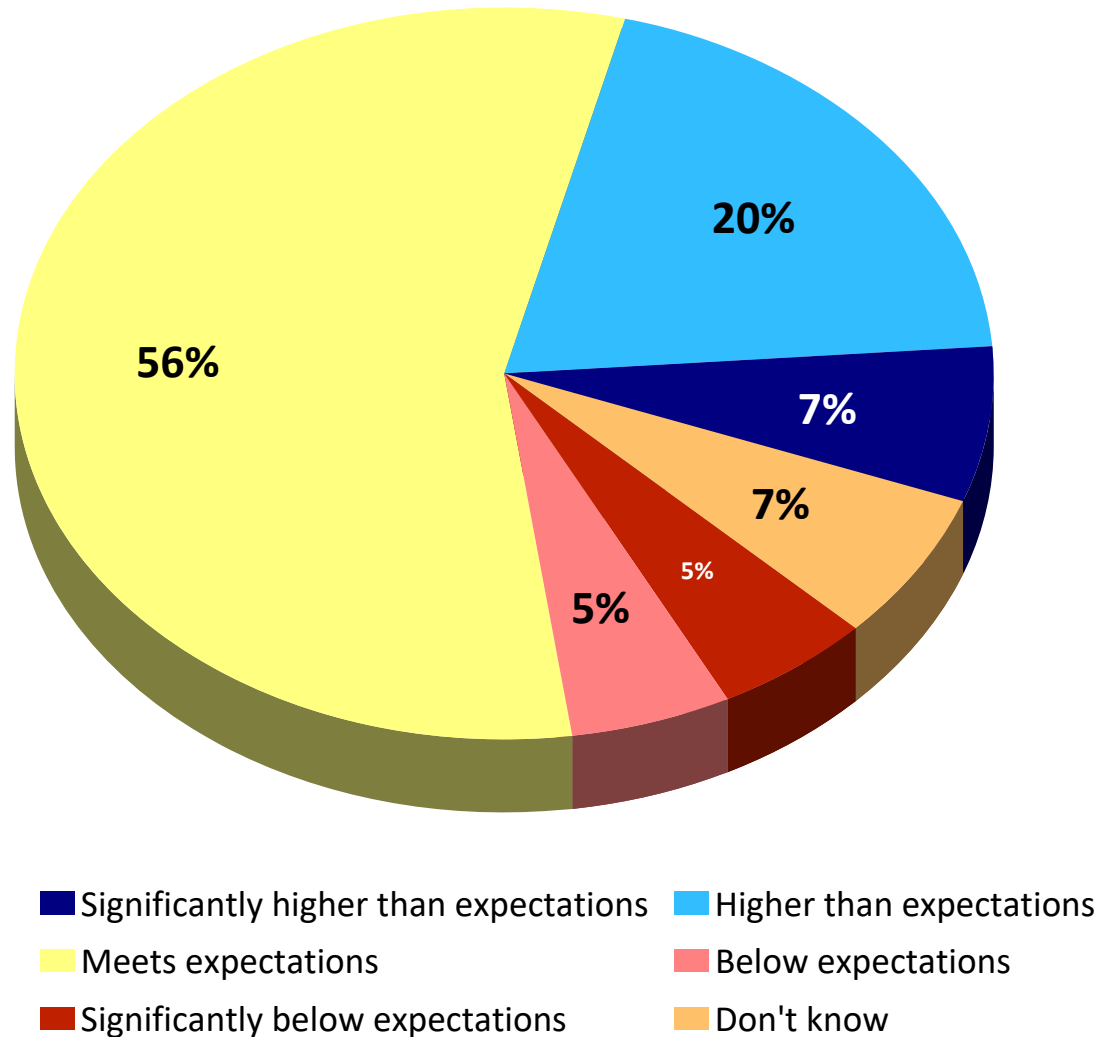
Q2. Village Services or Departments Rated as the Most Important to Their Business

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

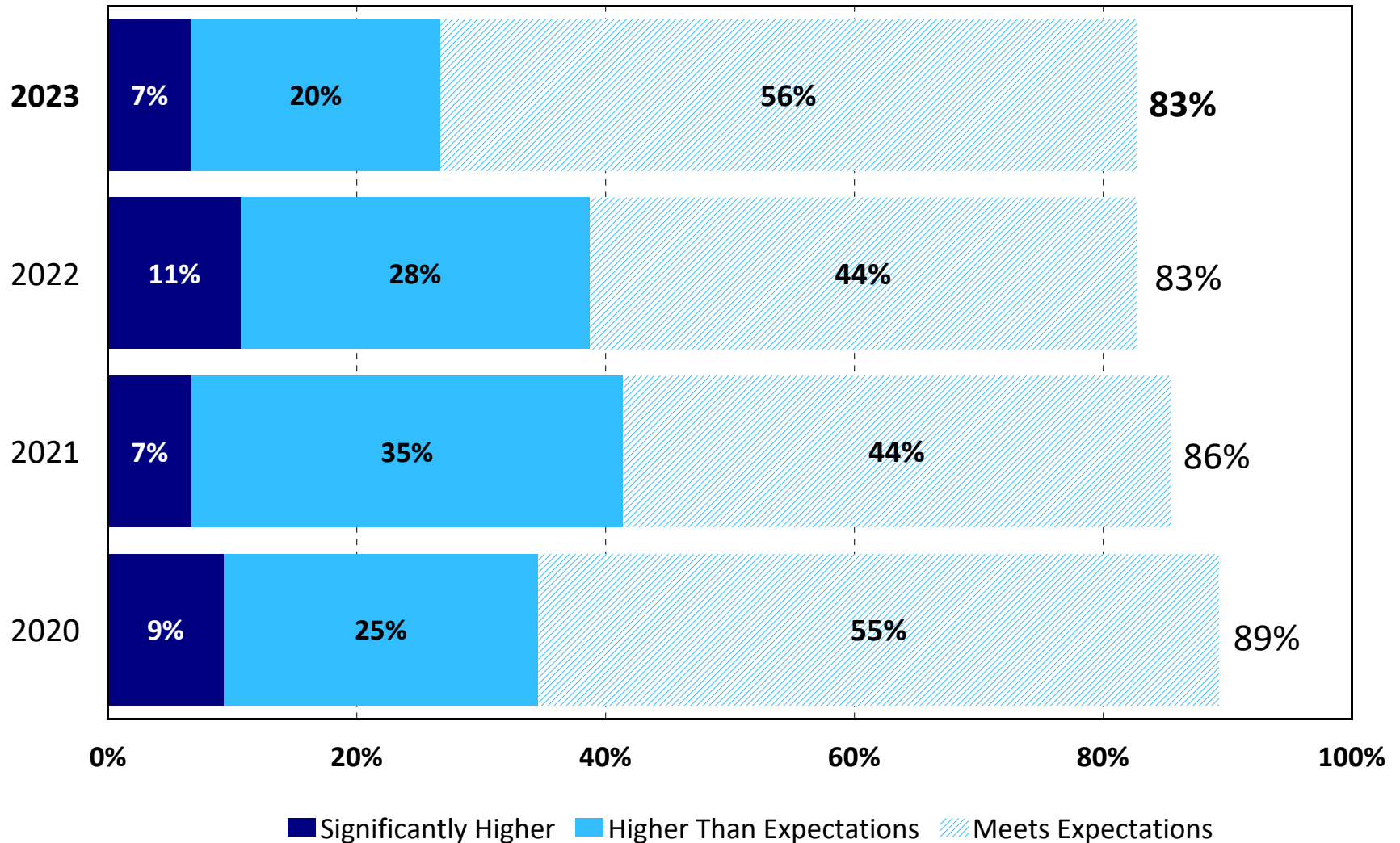
by percentage of respondents



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

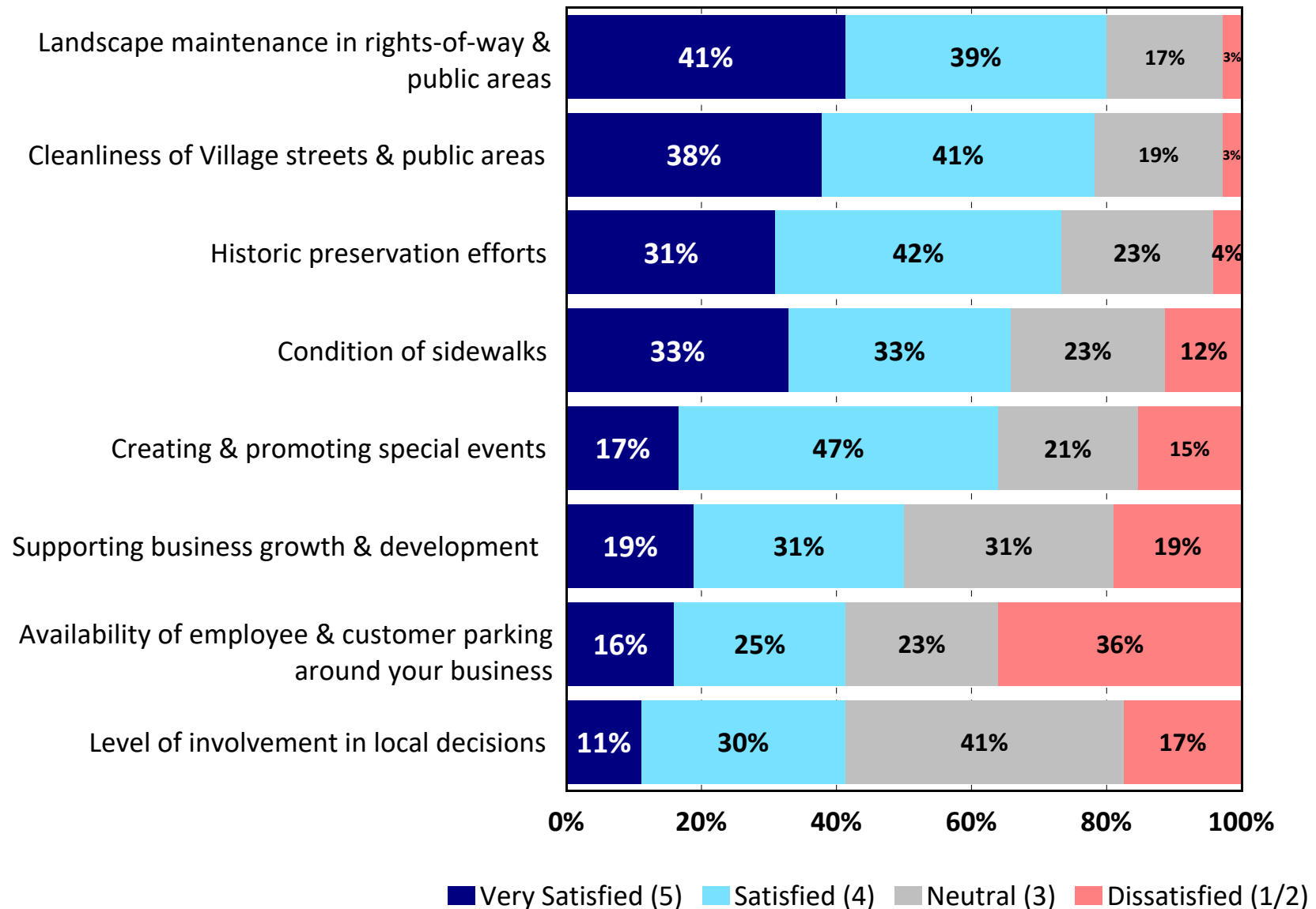
2020 to 2023

by percentage of respondents



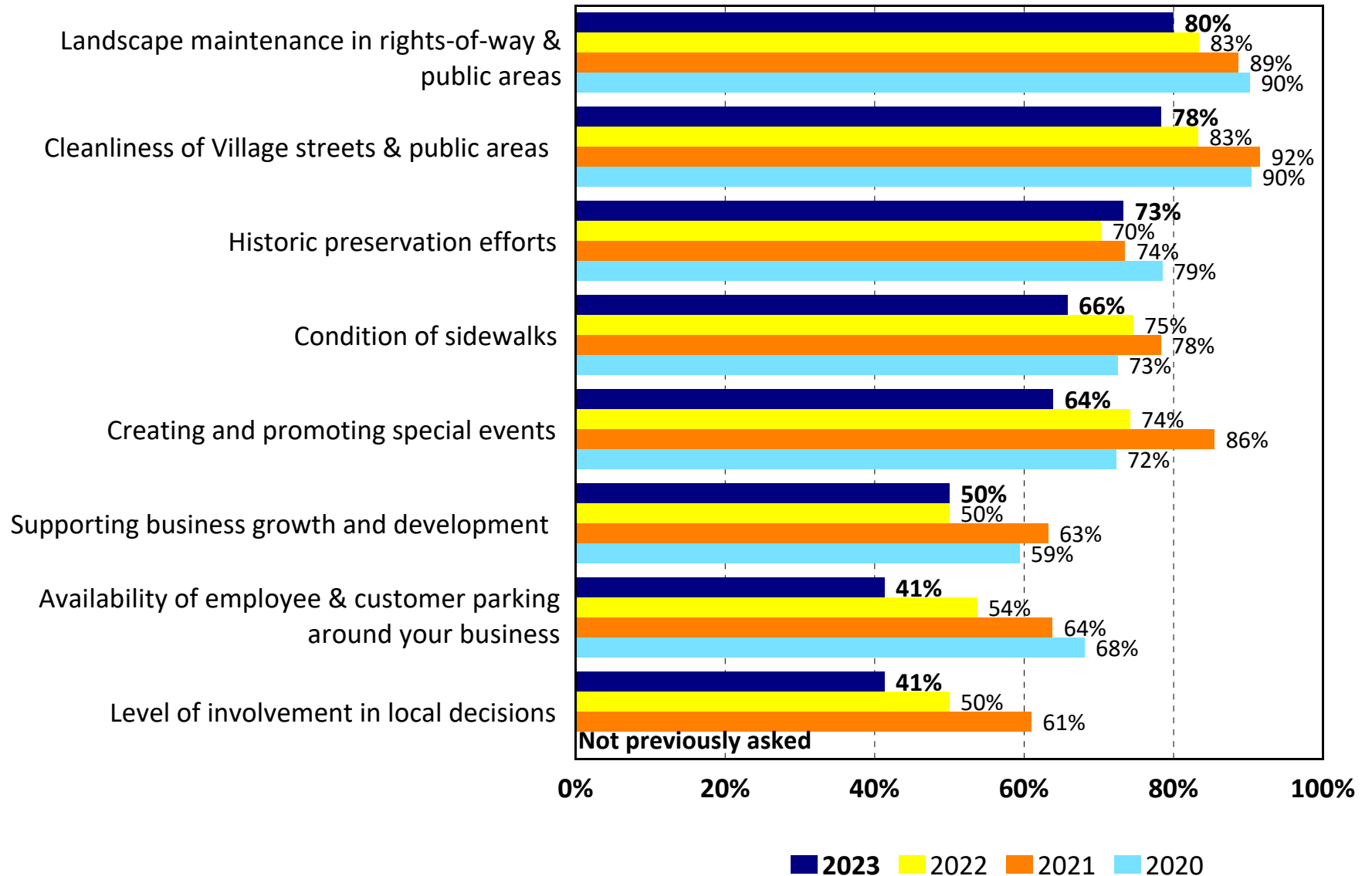
Q4. Level of Satisfaction with the Village in Various Areas

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



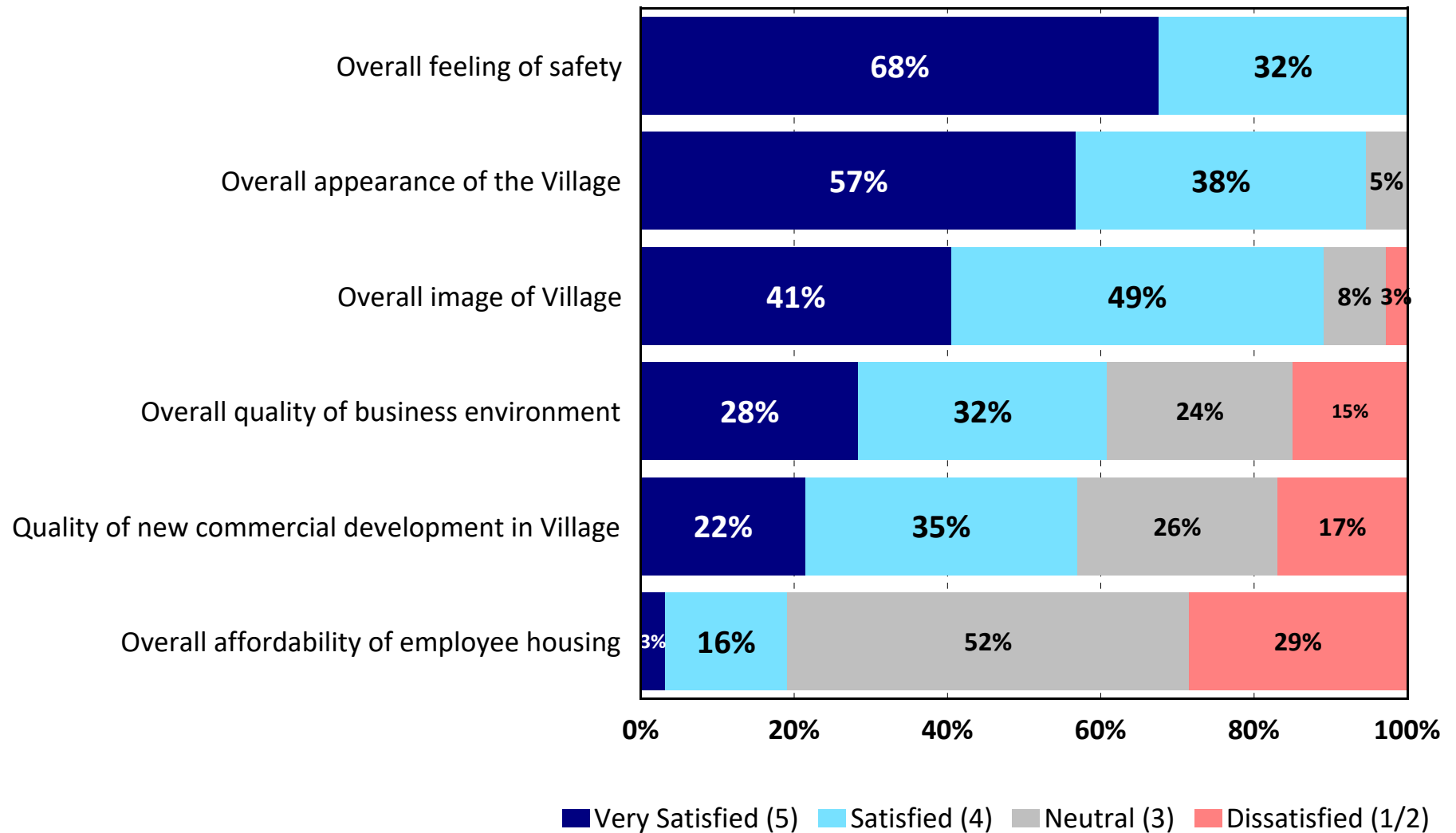
Q4. Level of Satisfaction with the Village in Various Areas 2020 to 2023

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



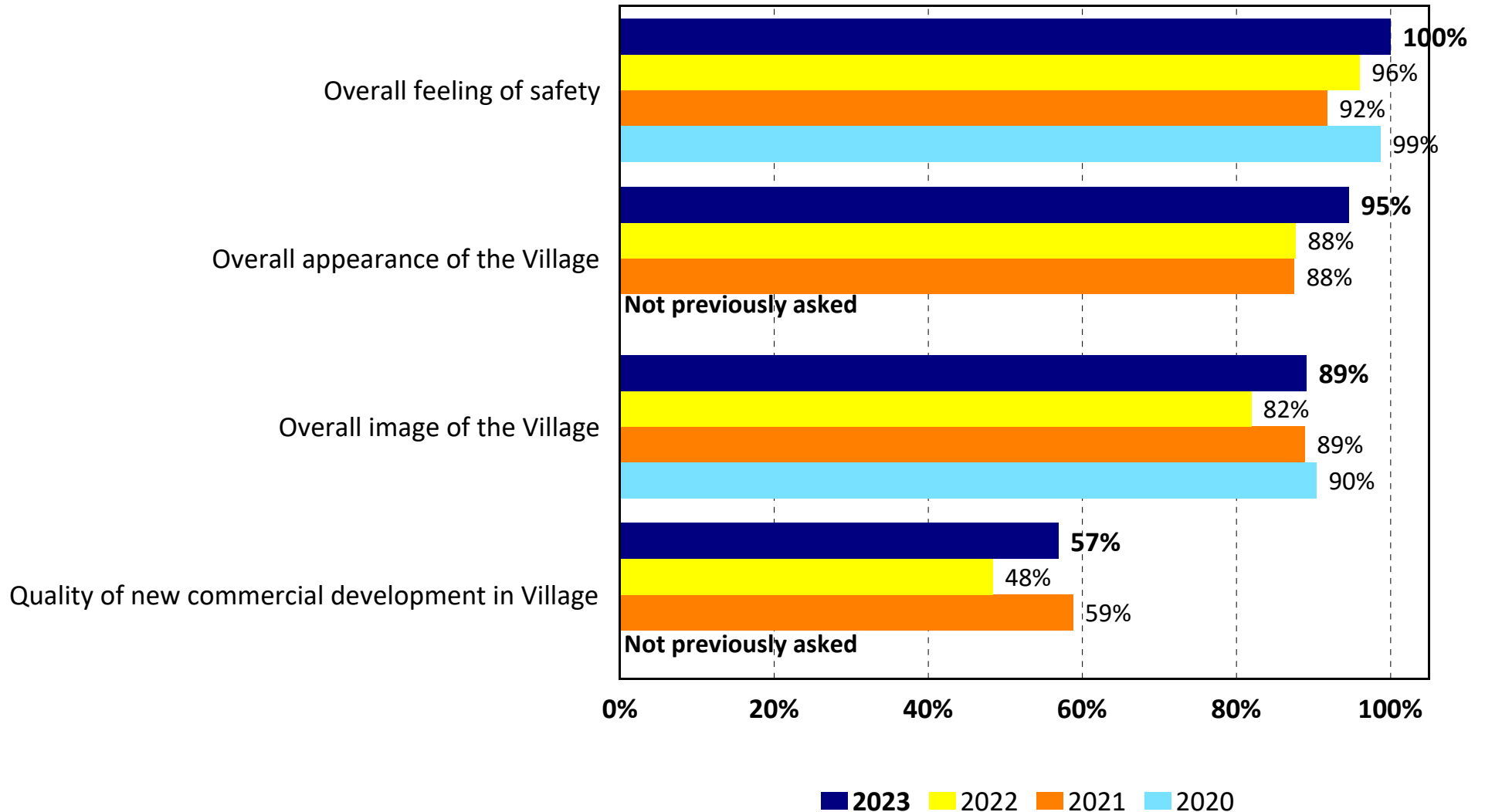
Q5. Overall Satisfaction with Various Perceptions of the Village of Pinehurst

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



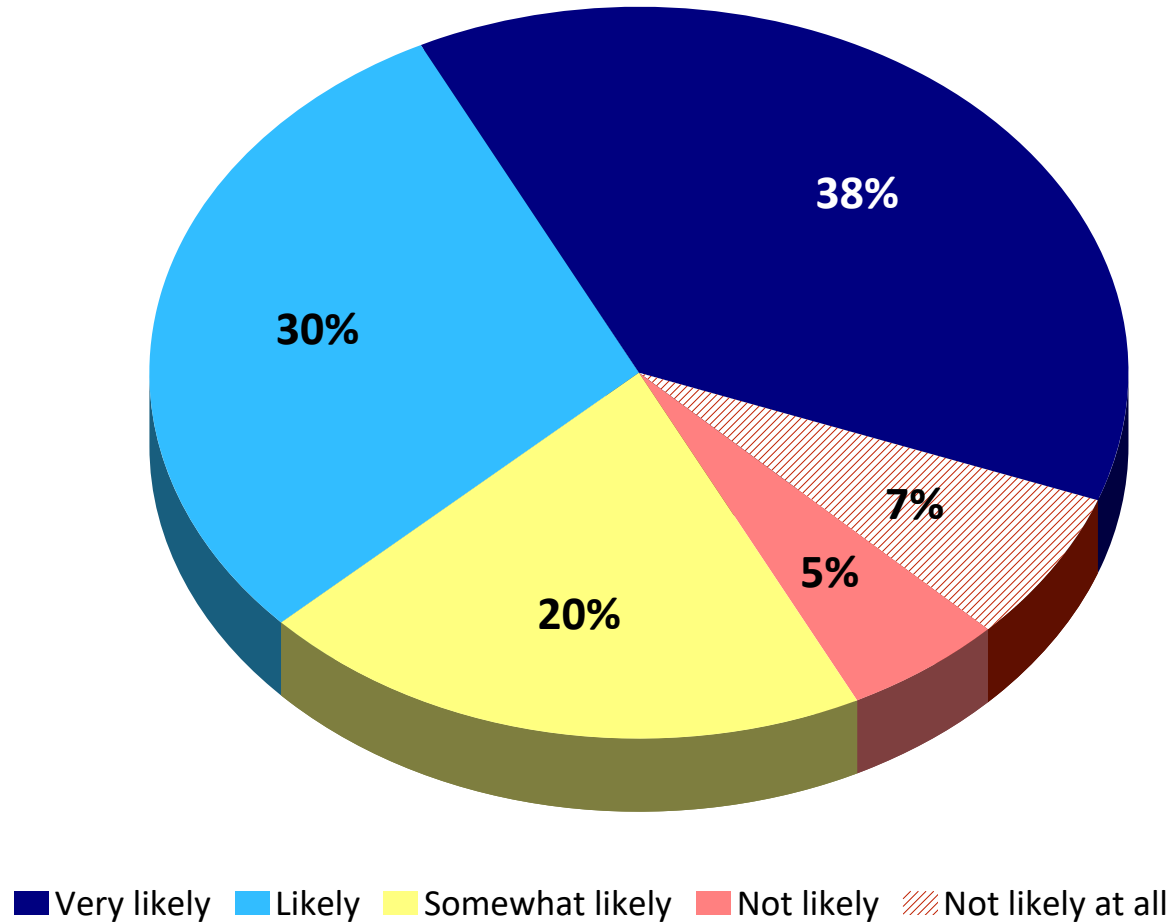
Q5. Overall Satisfaction with Various Perceptions of the Village of Pinehurst - 2020 to 2023

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")



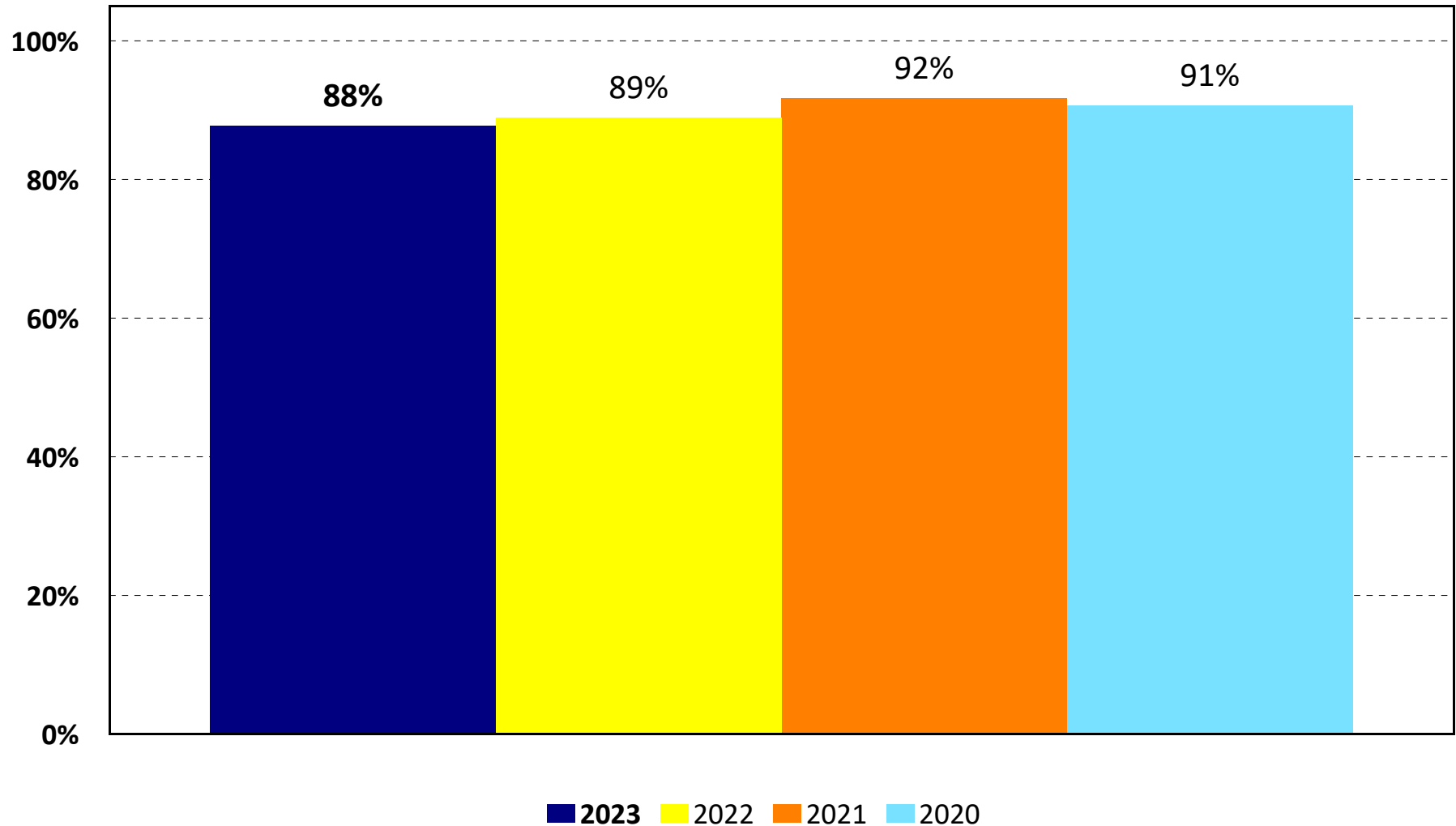
Q6. How likely would you be to recommend the Village as a business location to friends, family, and co-workers?

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



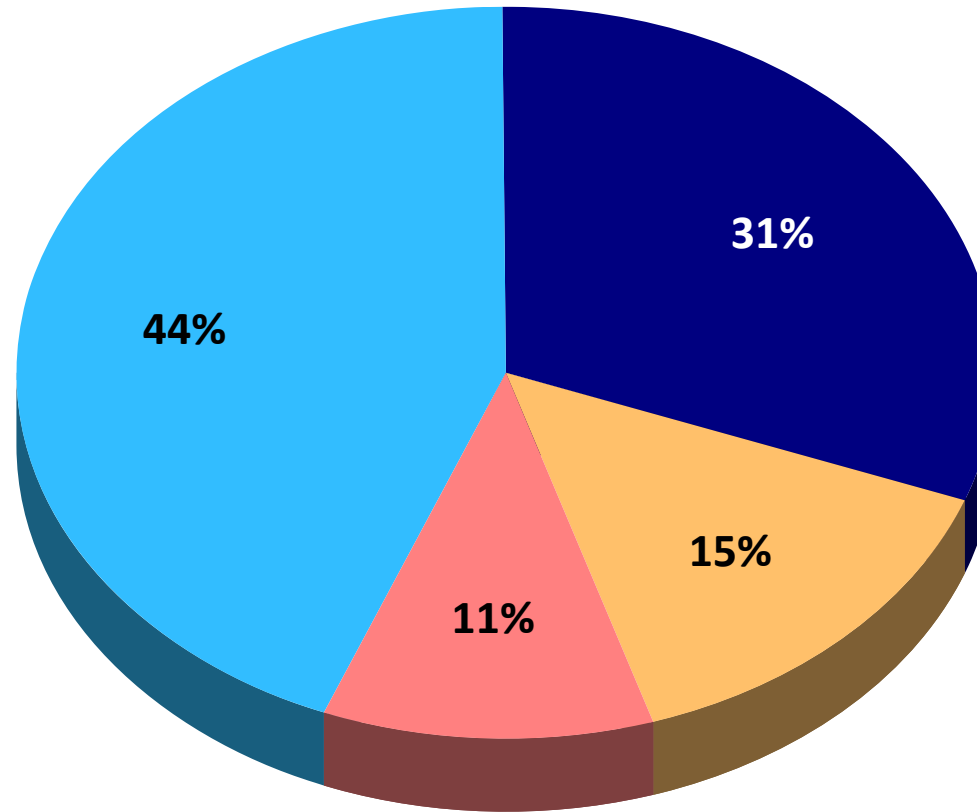
Q6. How likely would you be to recommend the Village as a business location to friends, family, and co-workers? - 2020 to 2023

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

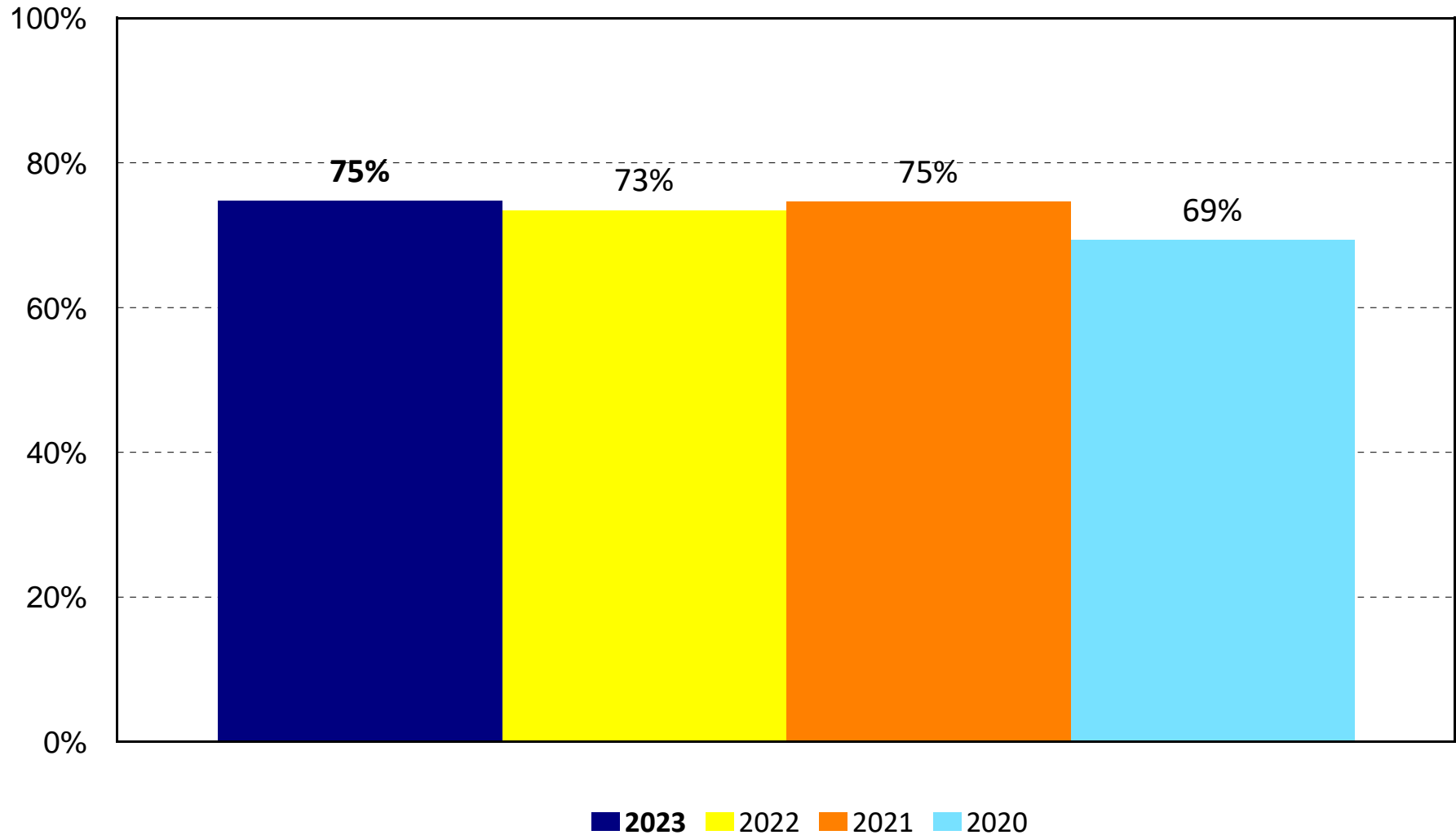


■ Better ■ No change, but good ■ Worse ■ Don't know

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

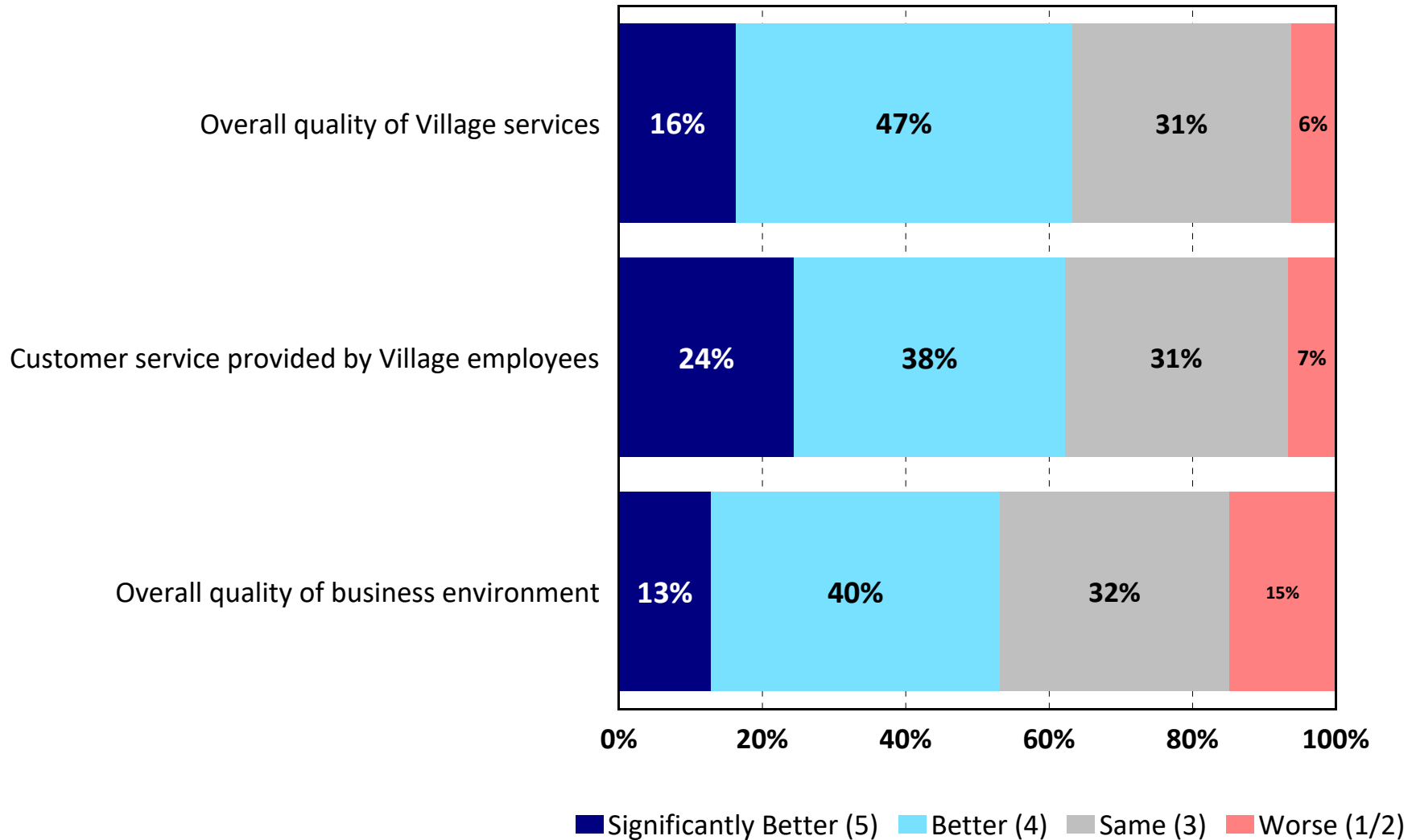
2020 to 2023

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



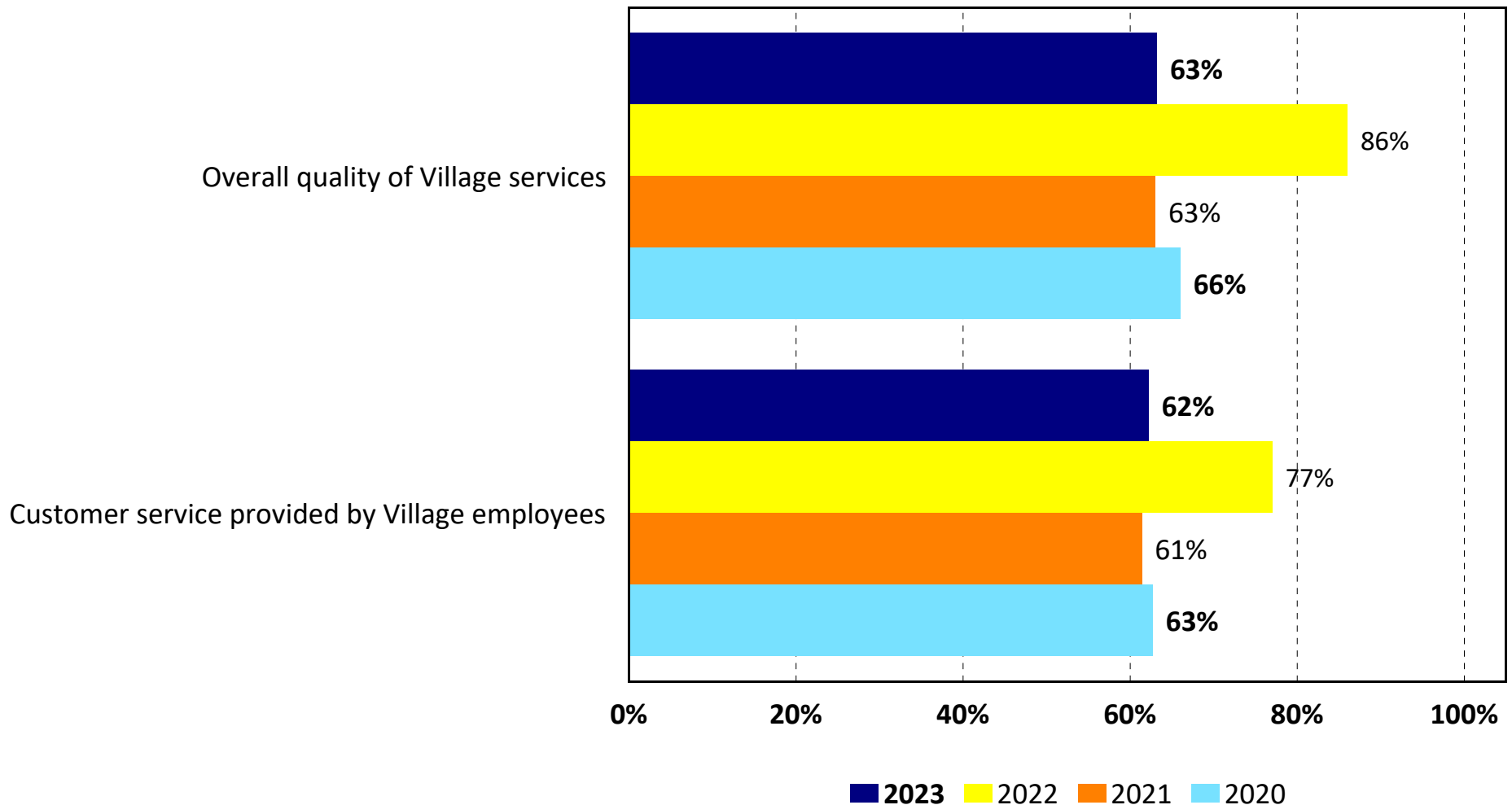
Q8. Satisfaction with Various Aspects of Pinehurst Compared to Other Places Businesses Have Operated in the Past

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”)



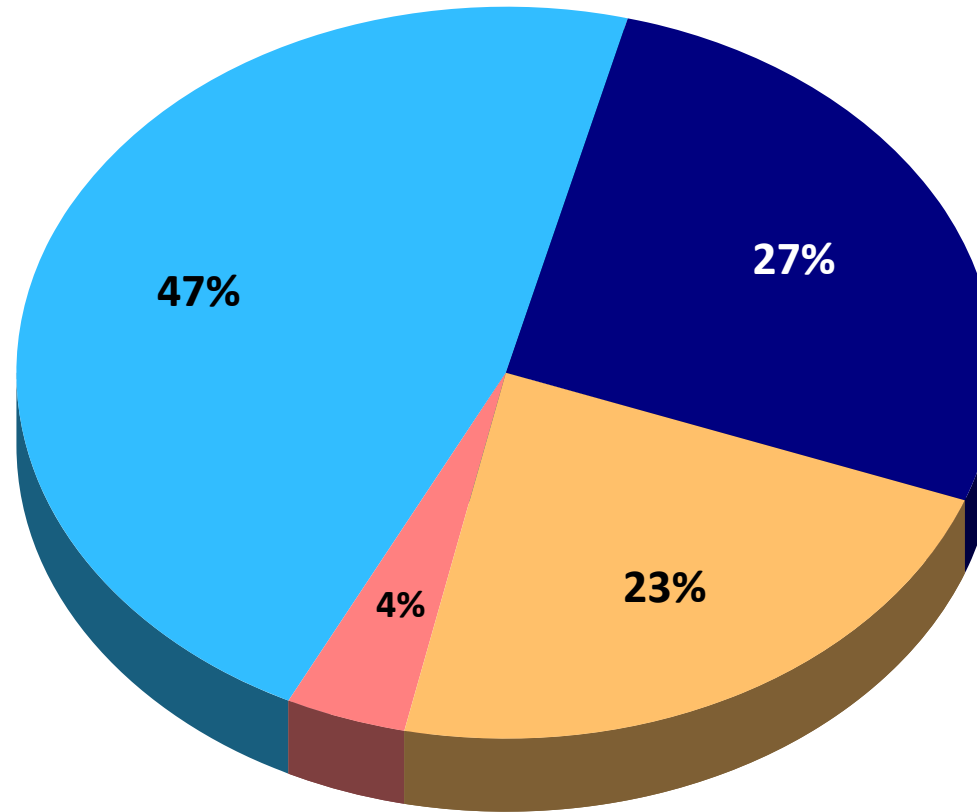
Q8. Satisfaction with various aspects of Pinehurst compared to other places businesses have operated in the past 2020 to 2023

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



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

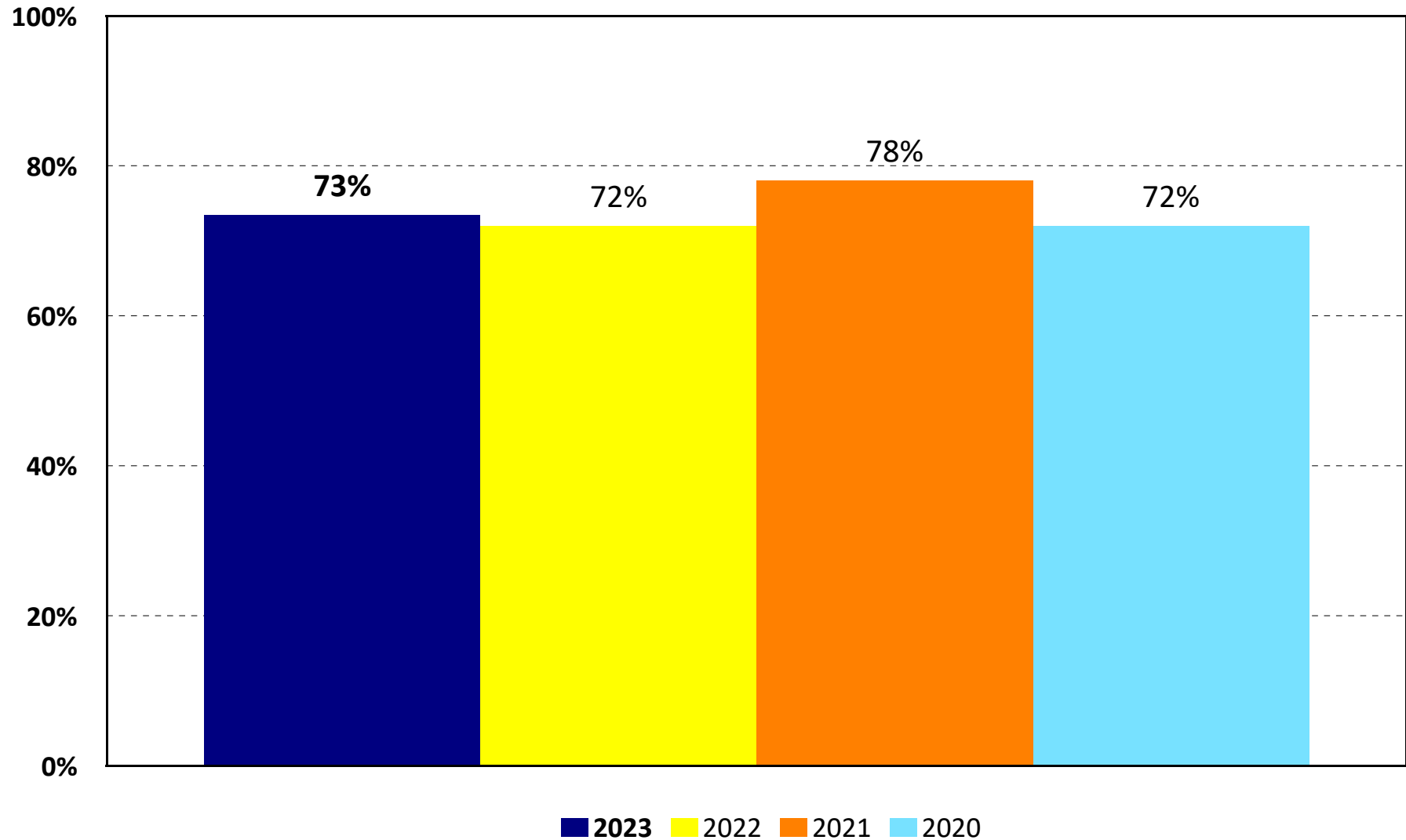
by percentage of respondents



Very good Good Poor Don't know

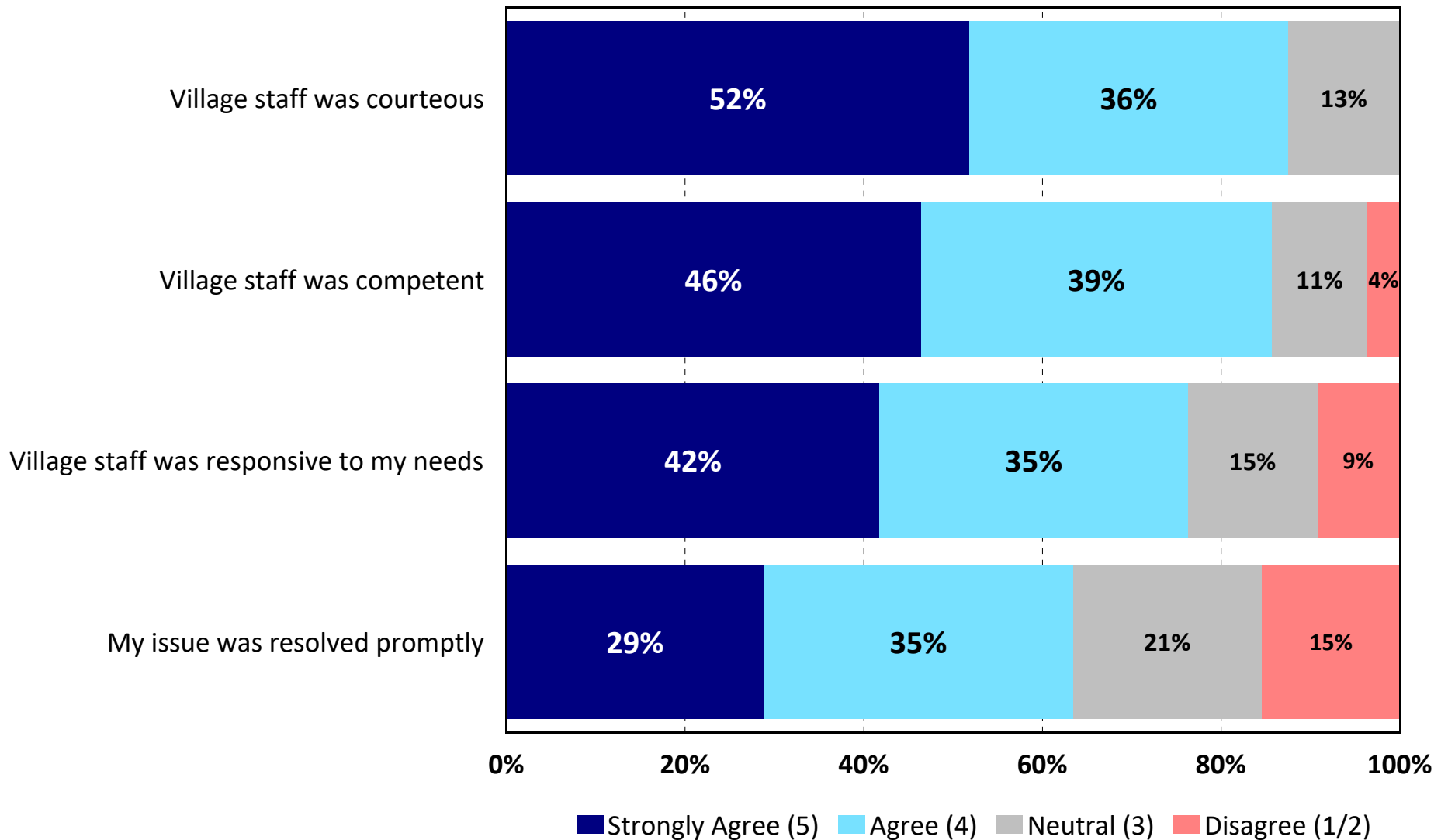
Q9. How would you rate the Village of Pinehurst customer service? - 2020 to 2023

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



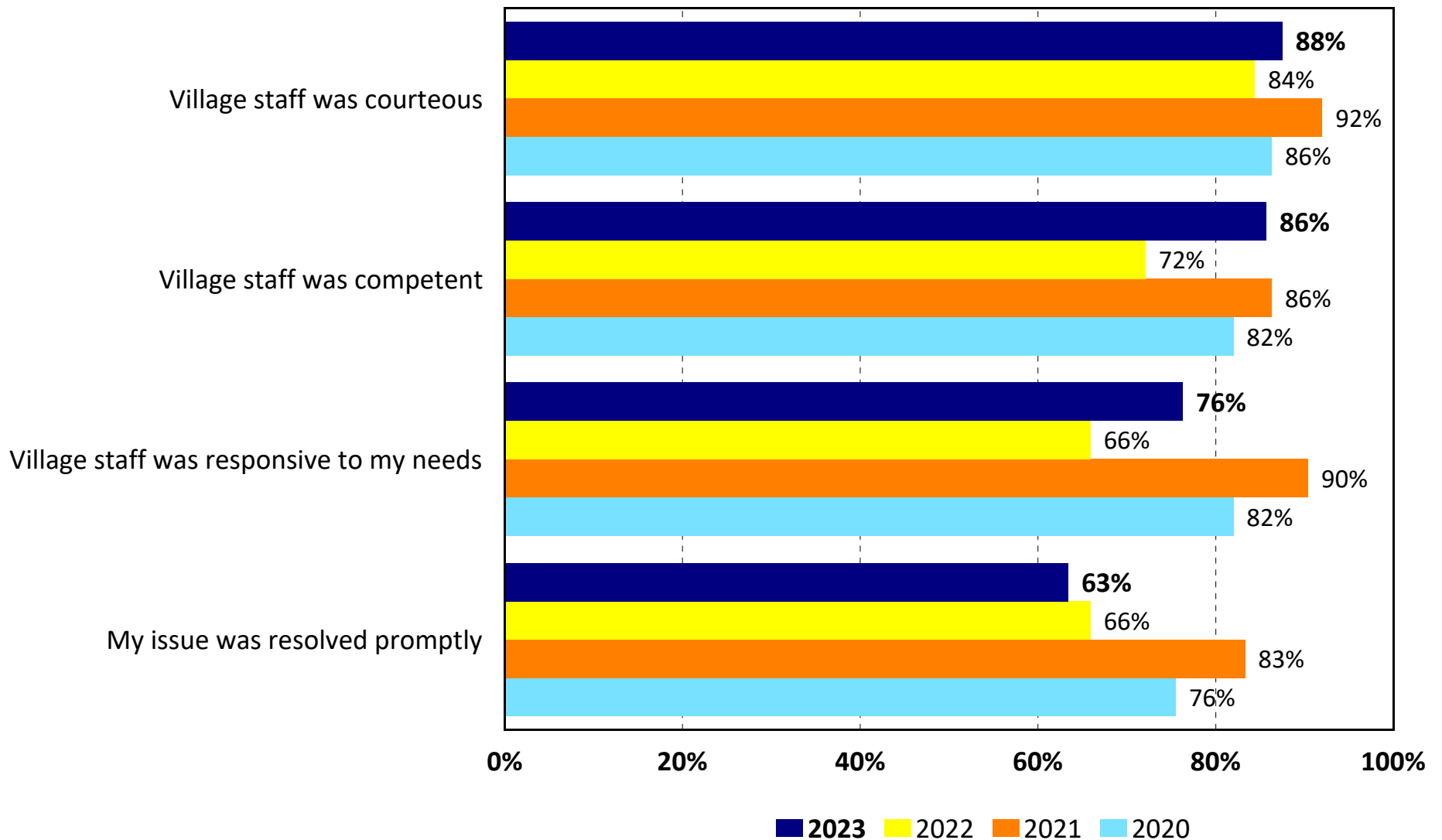
Q10. Level of Agreement with Statements About Most Recent Contact with the Village Government Staff

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



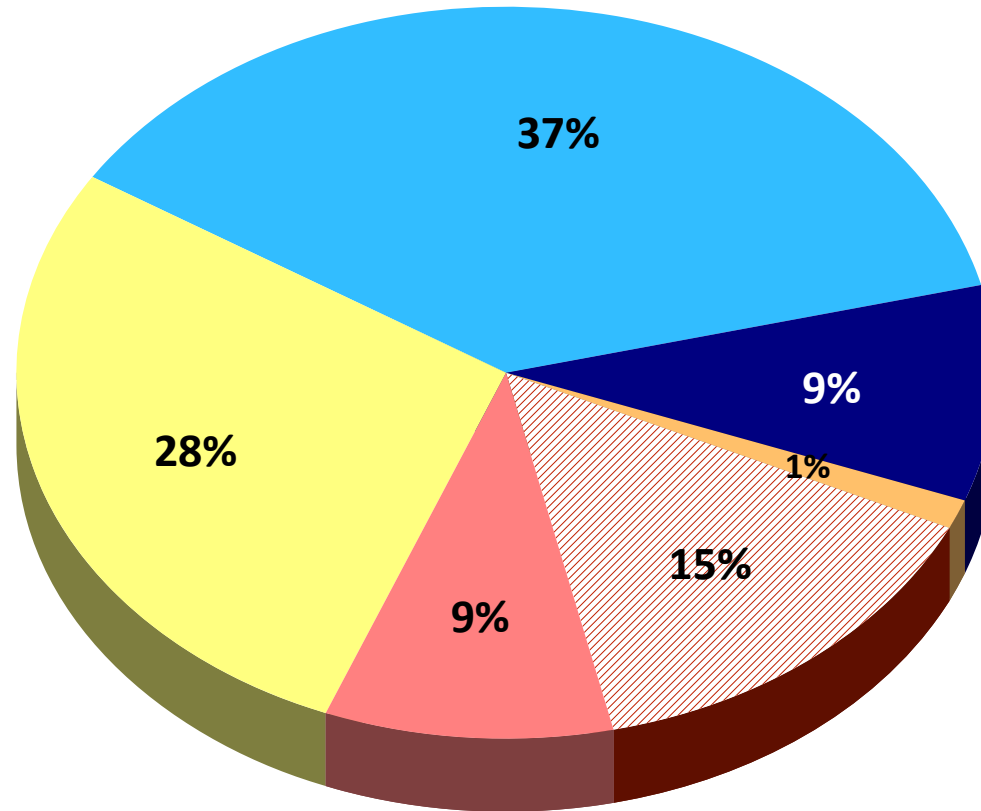
Q10. Level of Agreement with Statements About Most Recent Contact with the Village - 2020 to 2023

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?

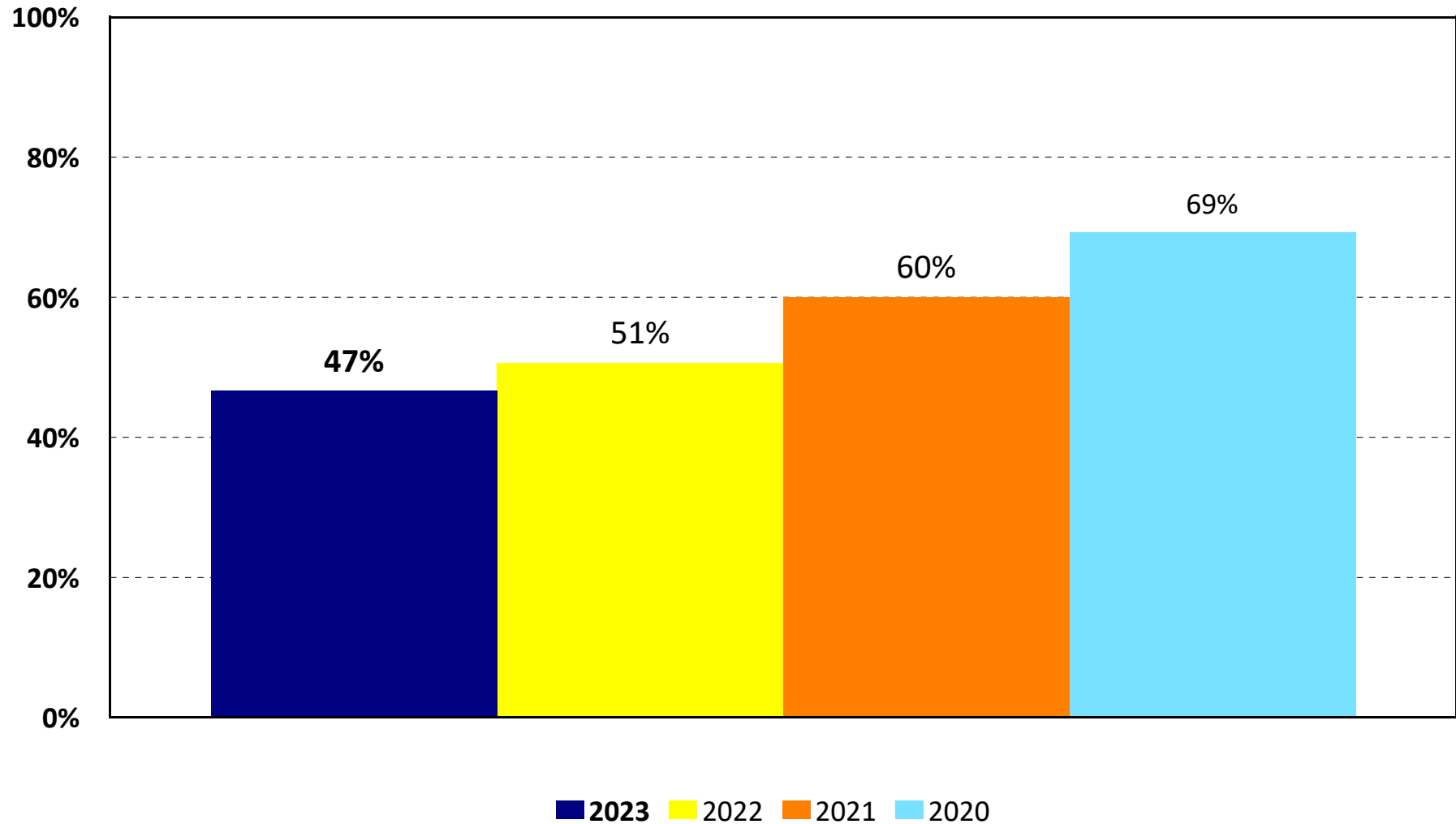
by percentage of respondents



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

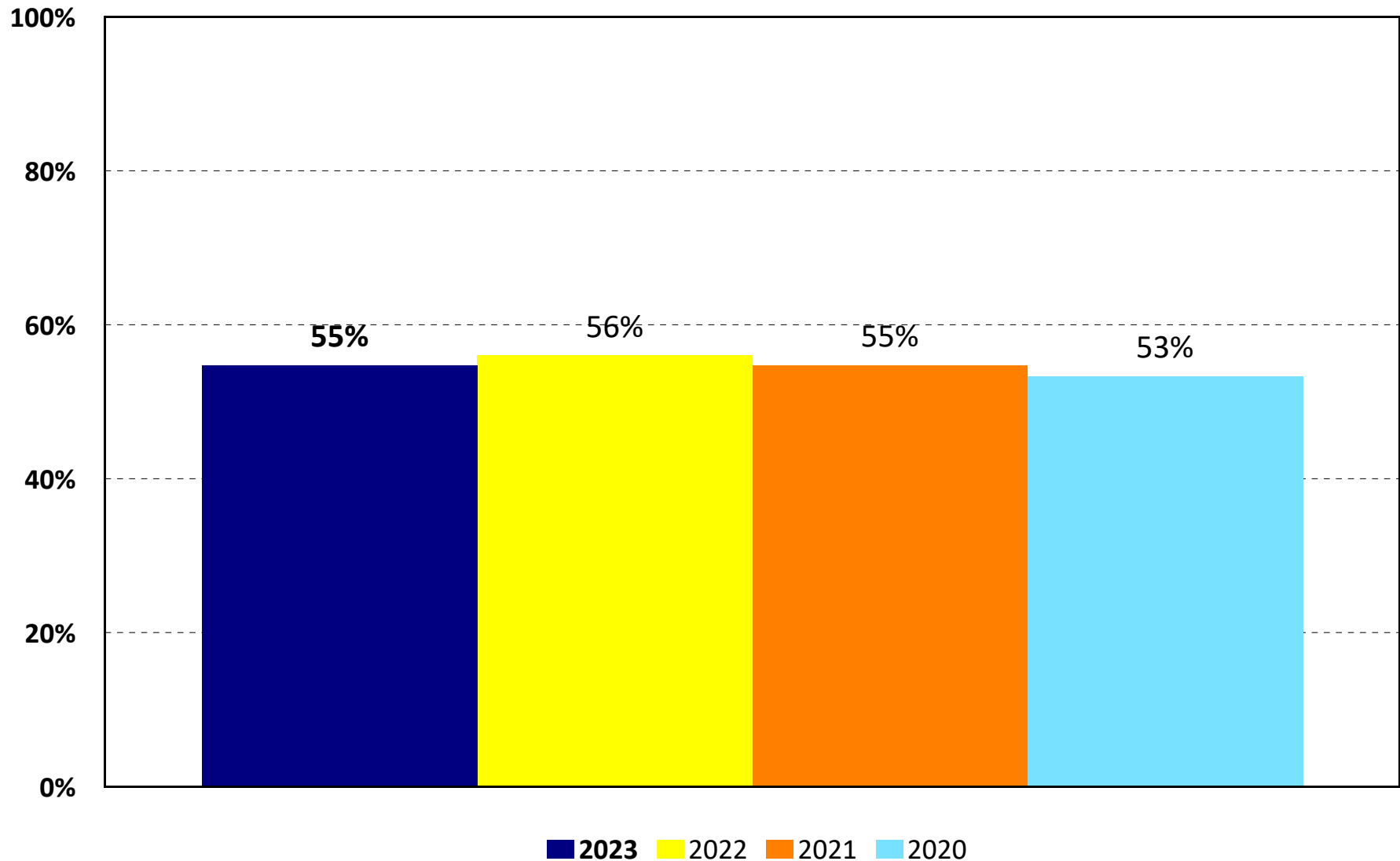
Q11. How satisfied are you with the job the Village of Pinehurst does communicating with business owners? 2020 to 2023

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



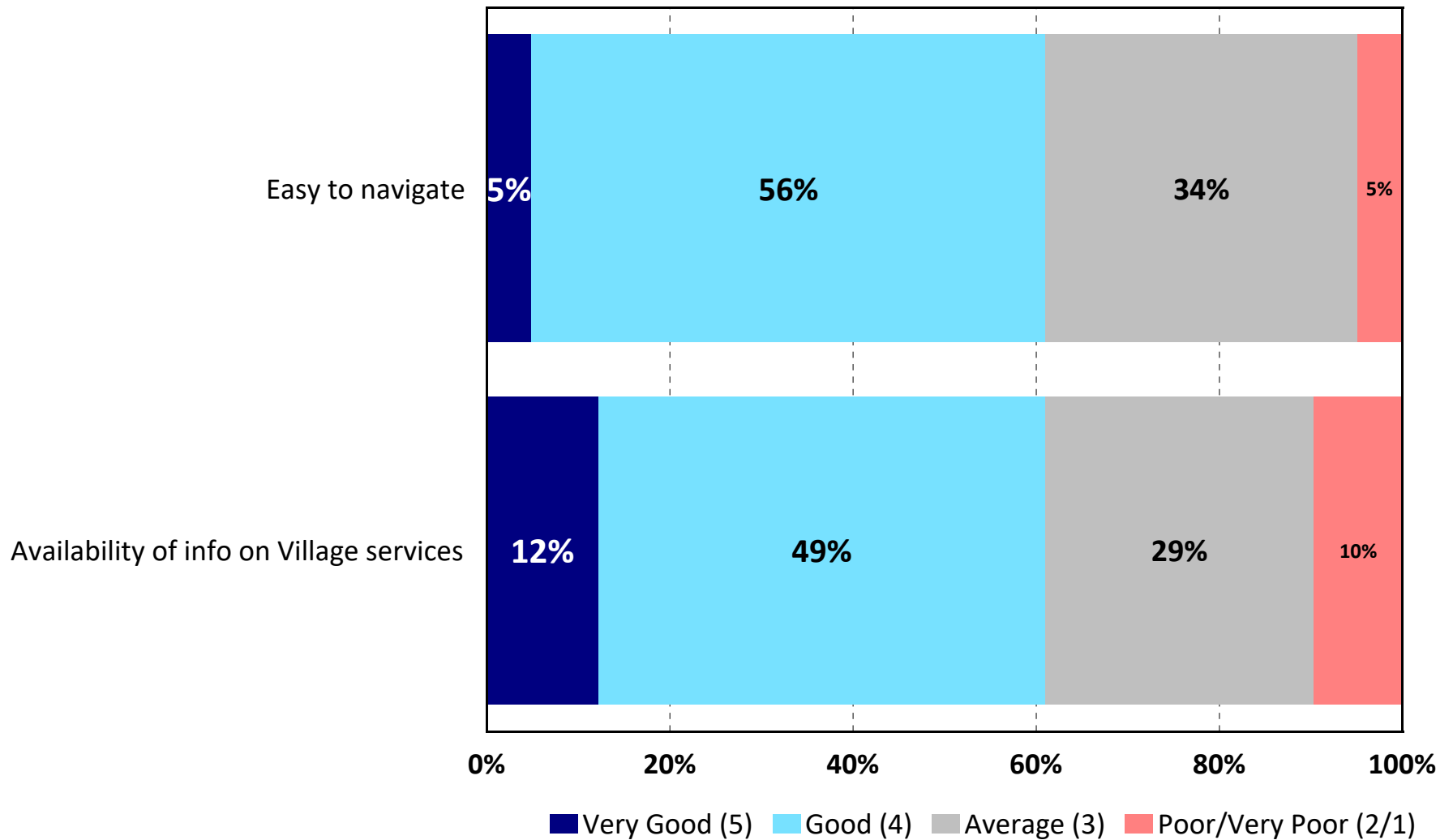
Q12. Have you visited the Village's website (www.vopnc.org) during the last 12 months? - 2020 to 2023

by percentage of respondents who answered "yes"



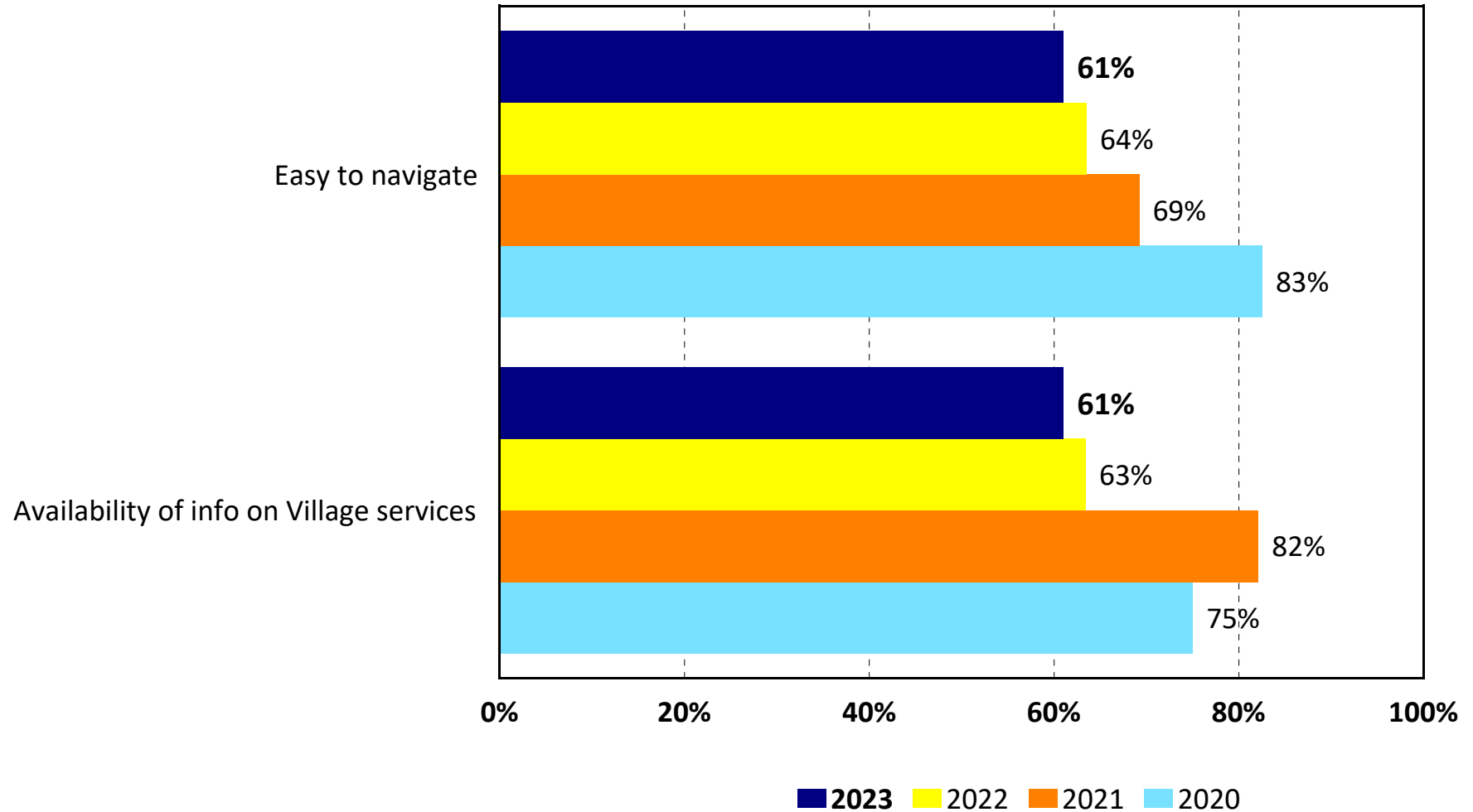
Q12a. How would you rate the following characteristics of the Village website?

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



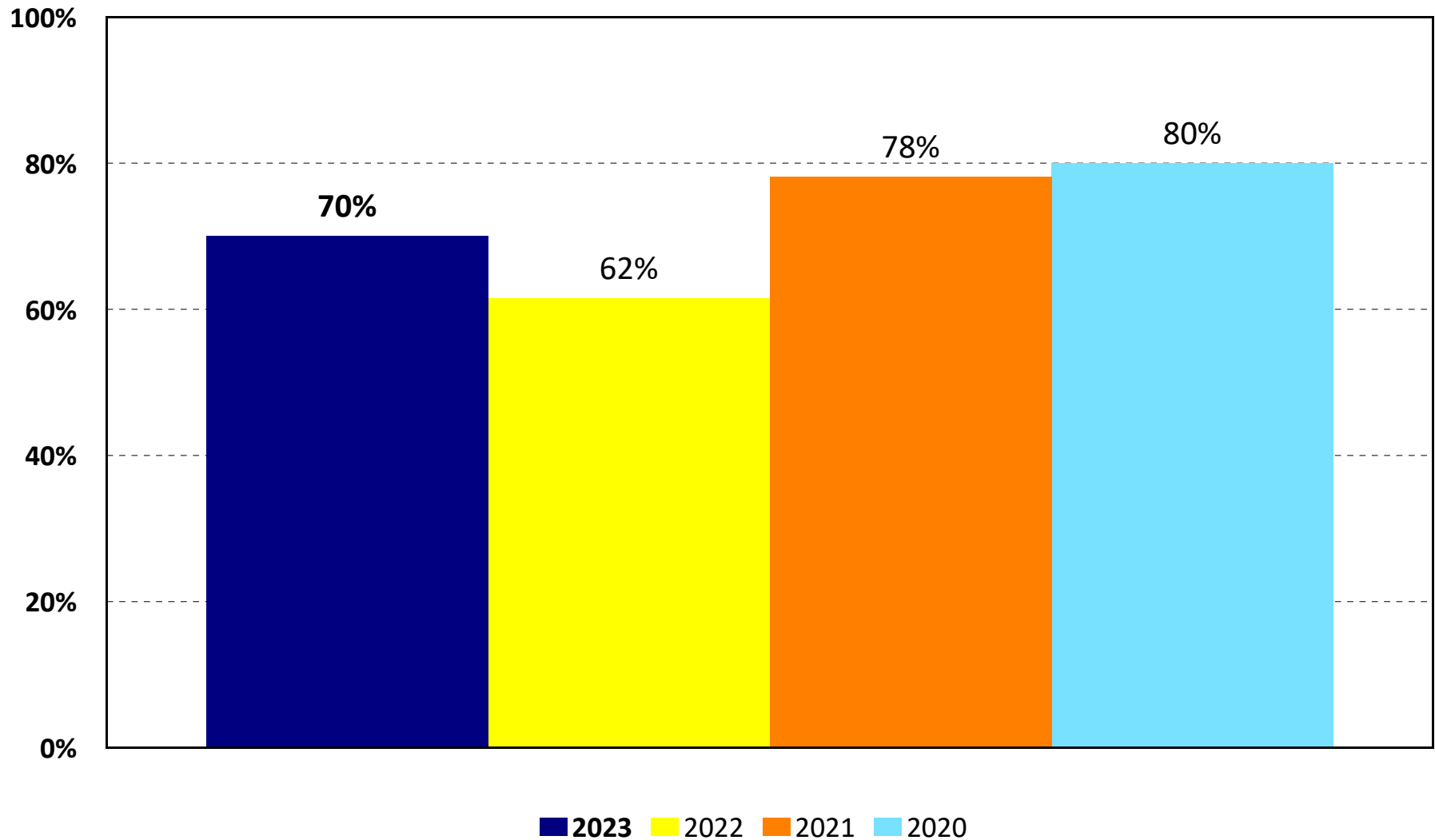
Q12a. How would you rate the following characteristics of the Village website? - 2020 to 2023

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



Q12b. How satisfied are you with the Village's website? 2020 to 2023

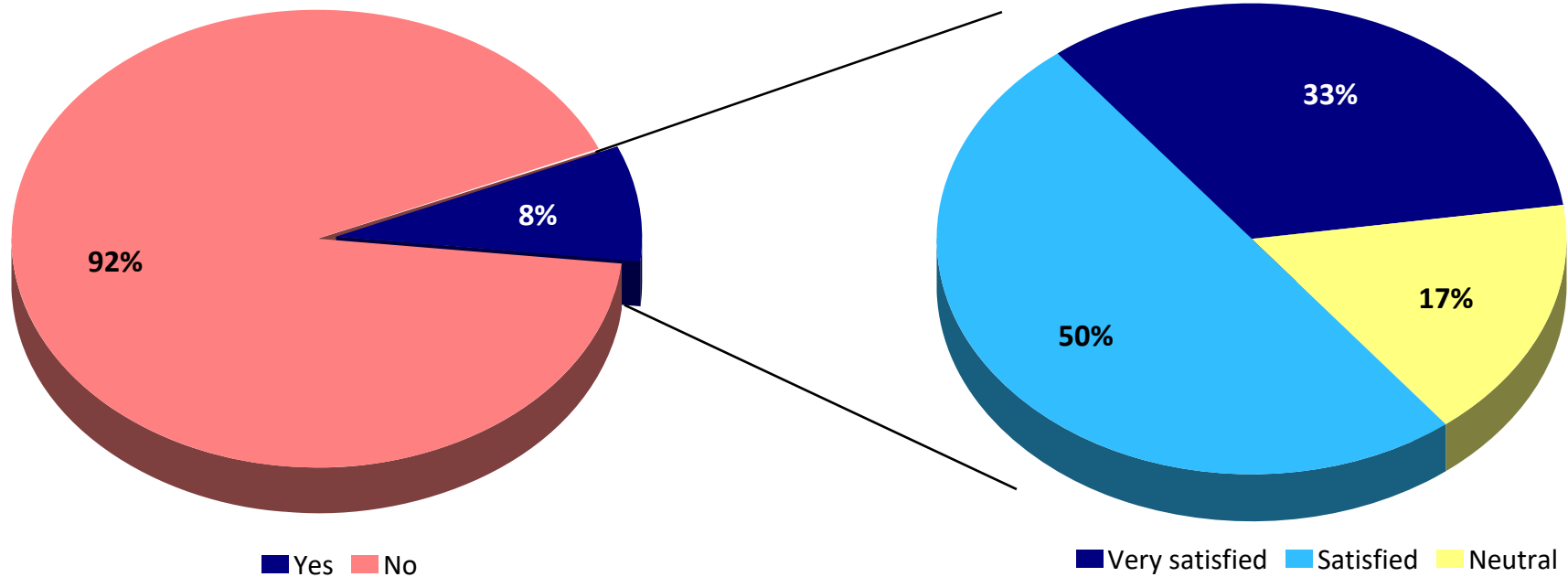
by percentage of respondents who responded "very satisfied" or "satisfied"



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

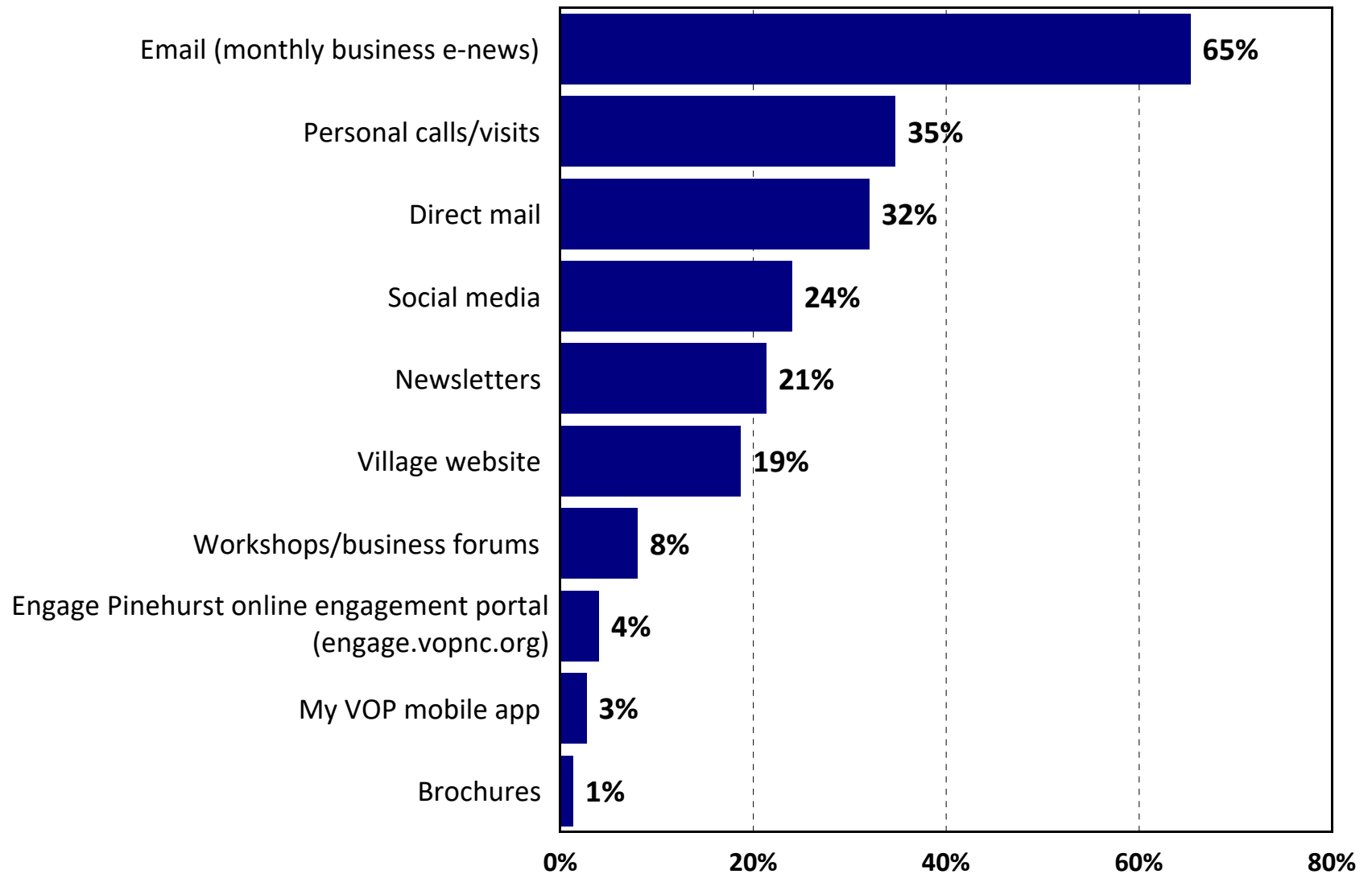
by percentage of respondents

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?

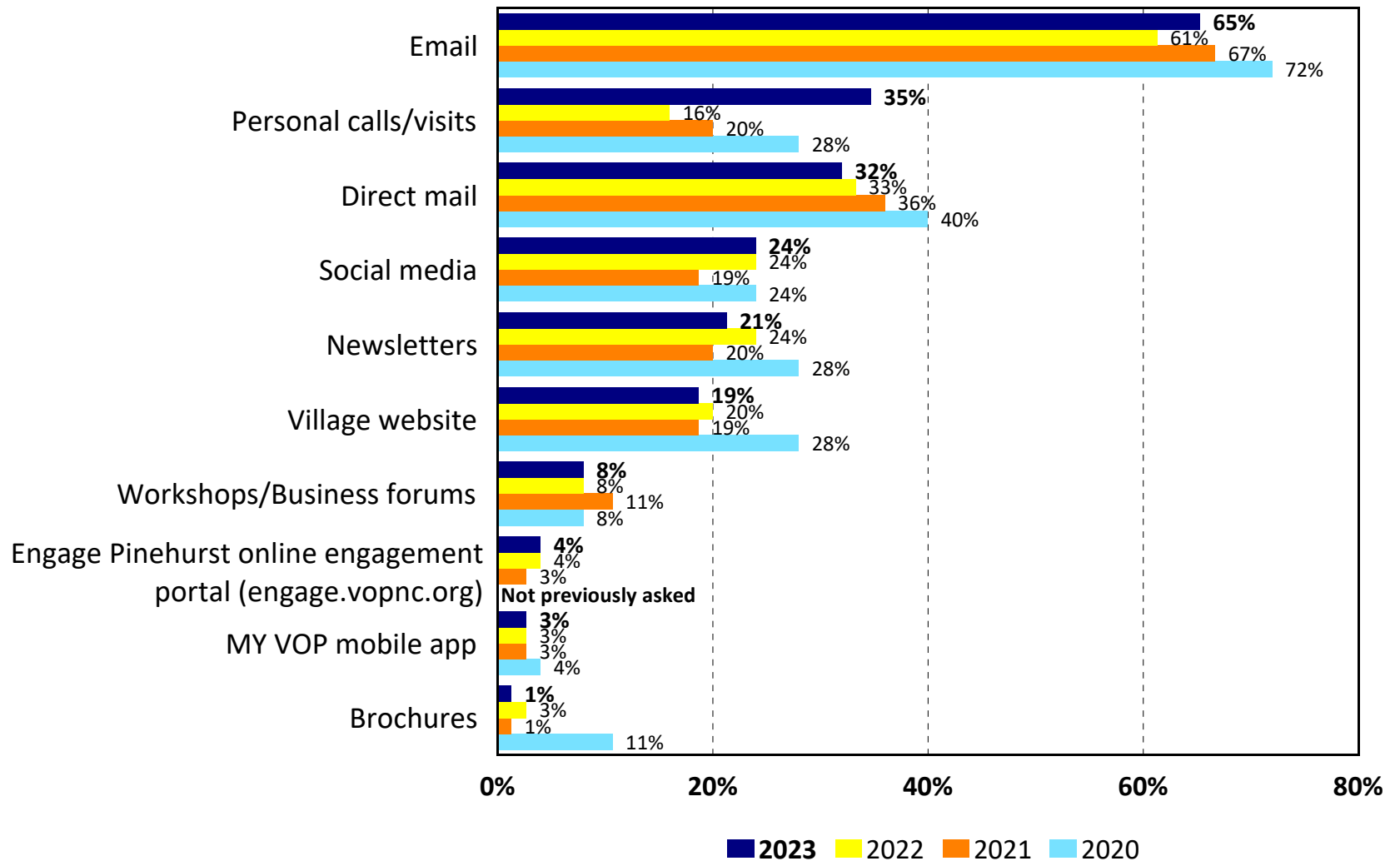
by percentage of respondents (multiple choices could be made)



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

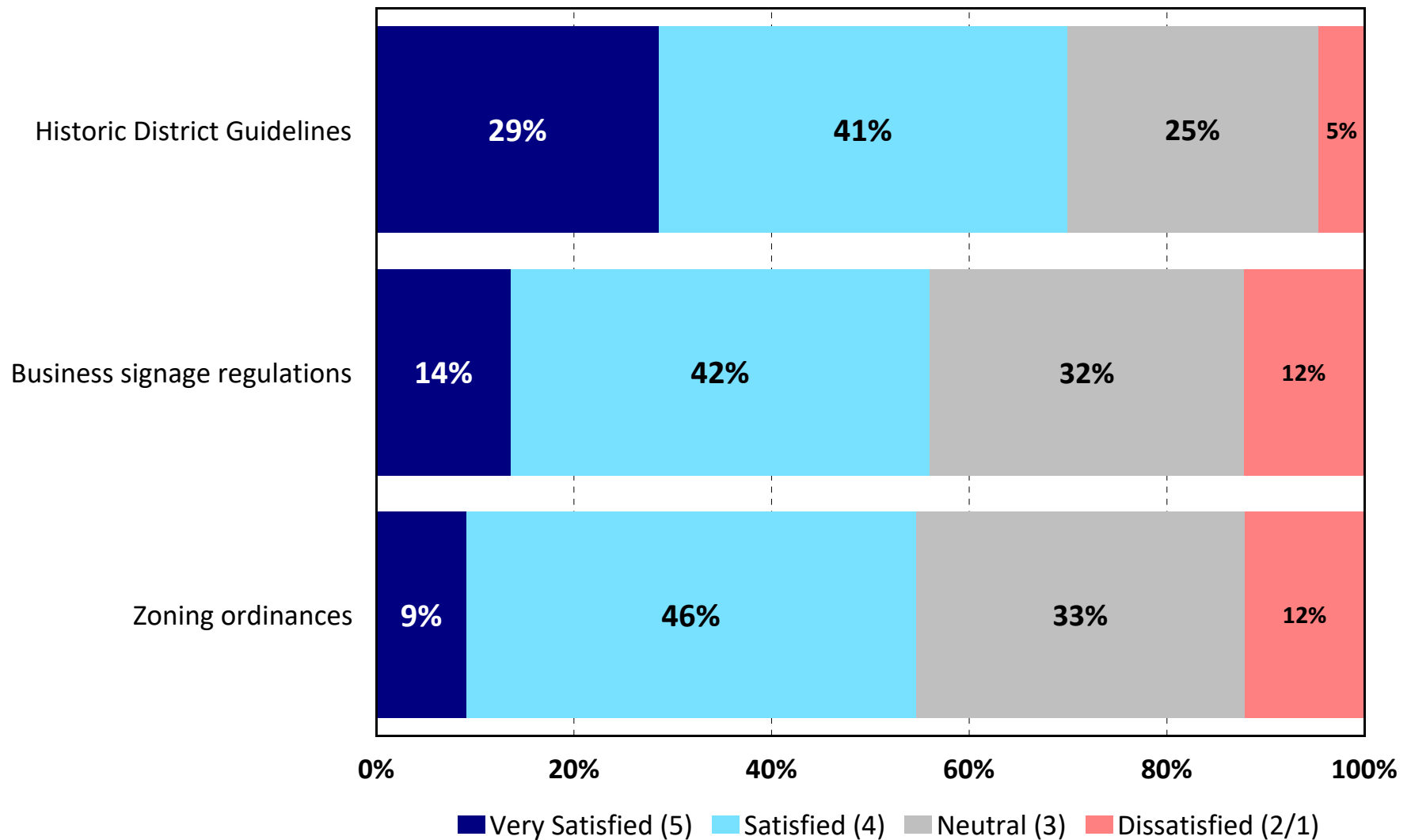
2020 to 2023

by percentage of respondents (multiple choices could be made)



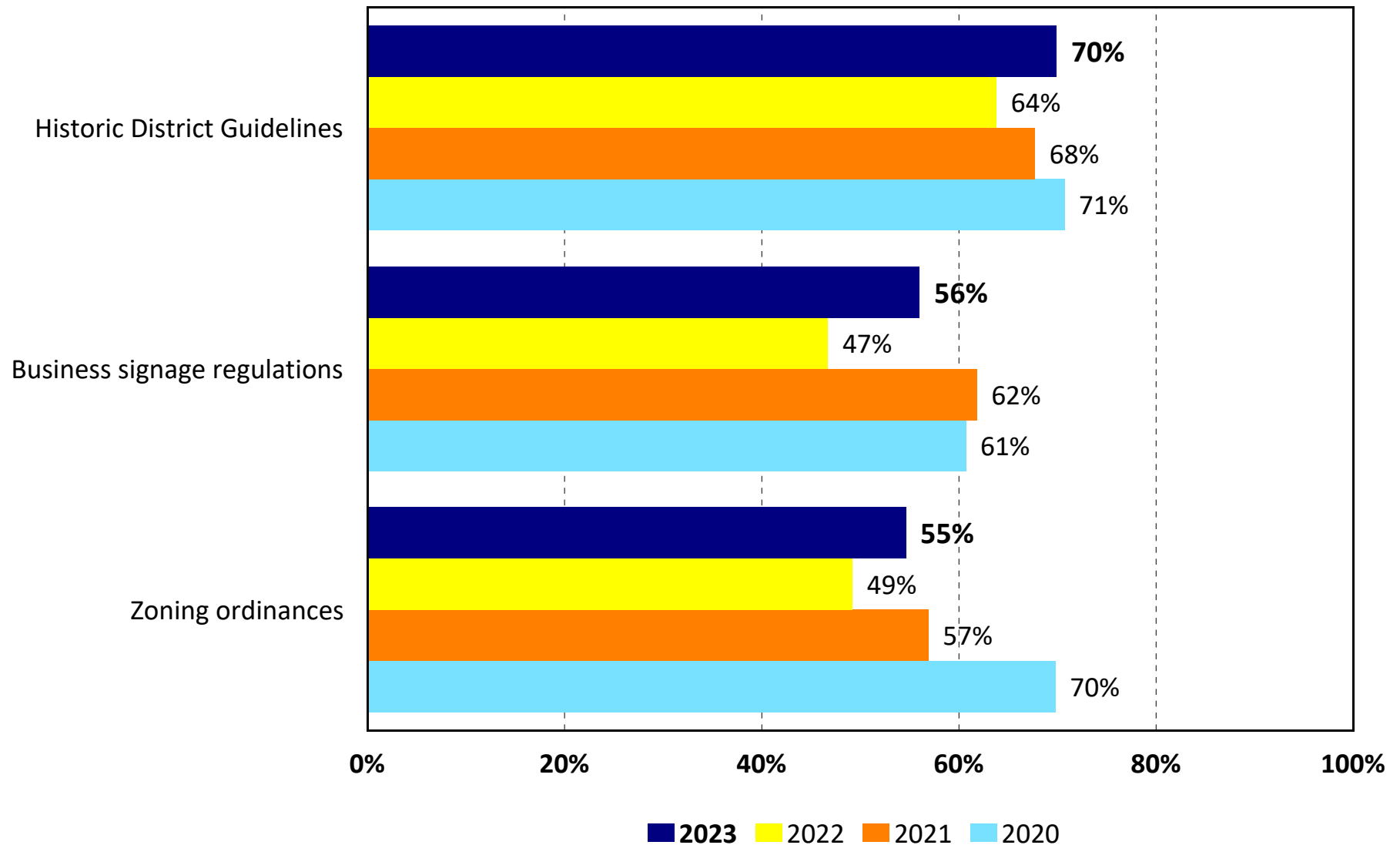
Q15. Level of Satisfaction with Community Development (Village Codes and Ordinances)

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")



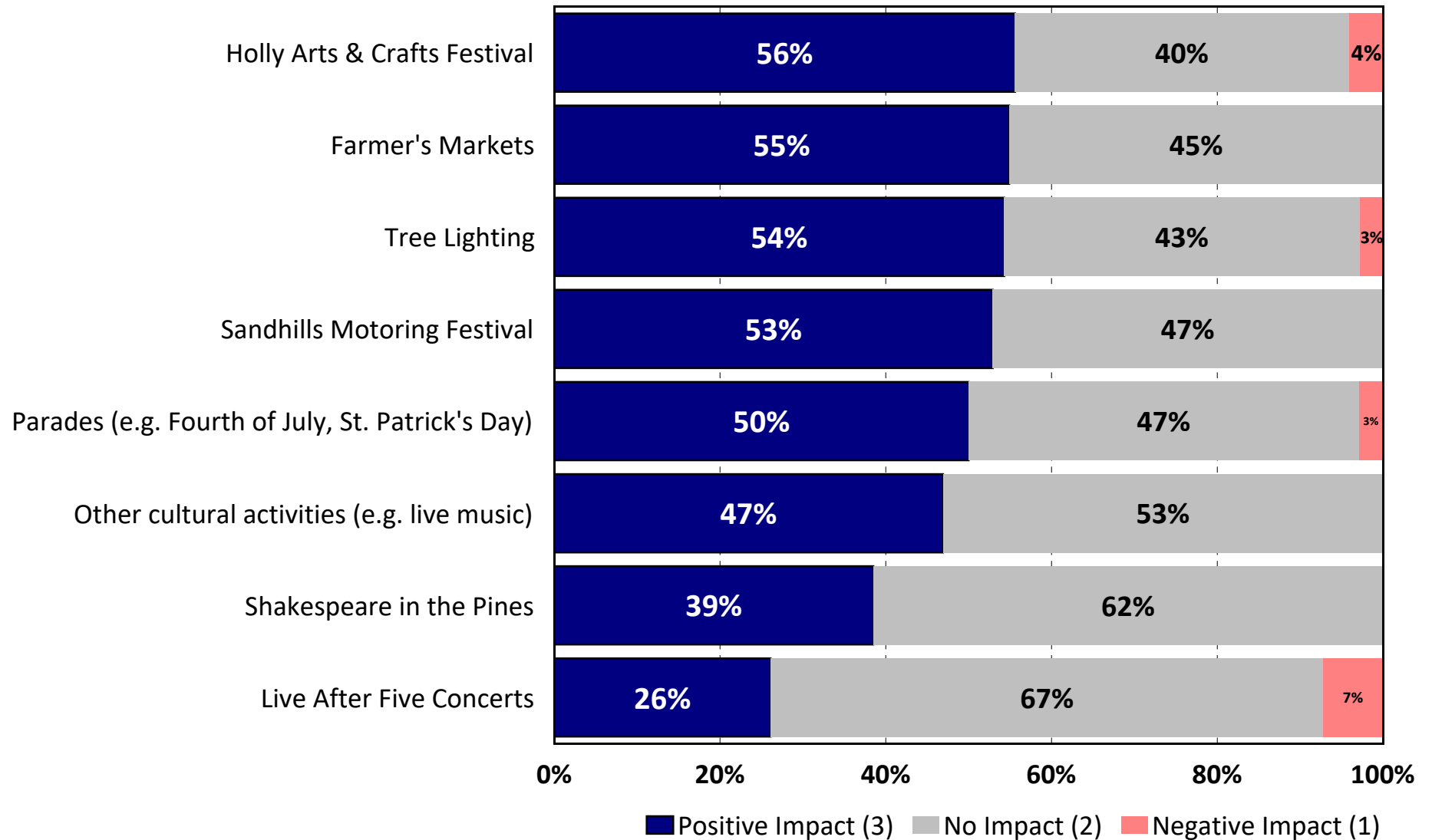
Q15. Level of Satisfaction with Community Development (Village Codes and Ordinances) - 2020 to 2023

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



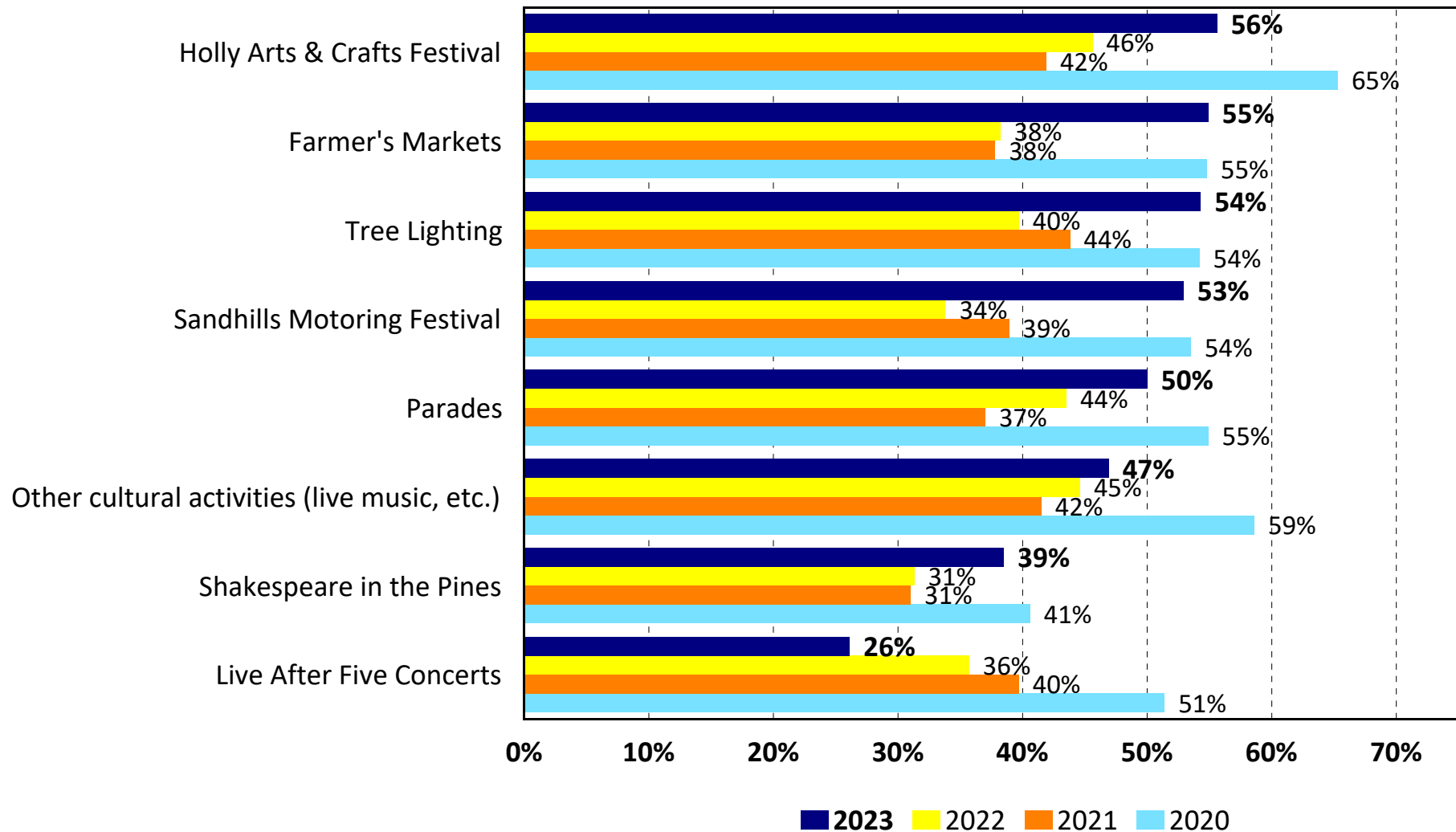
Q16. How Businesses Feel About the Impact the Following Events in the Village Center Have on Their Business

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



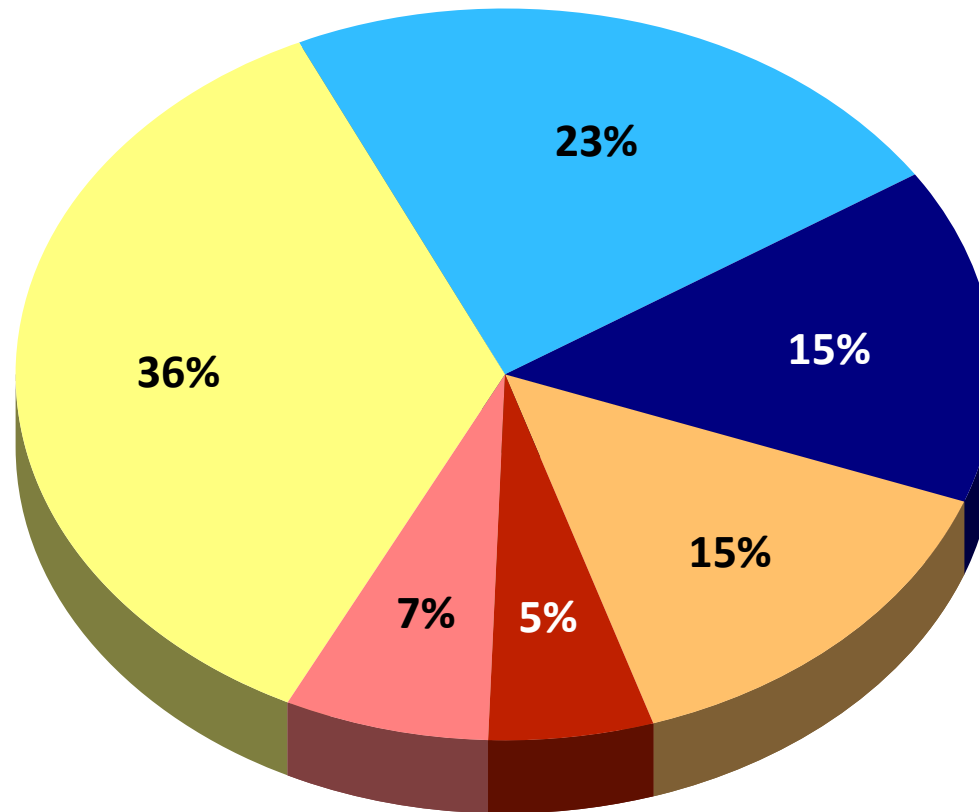
Q16. How Businesses Feel About the Impact the Following Events in the Village Center Have on Their Business 2020 to 2023

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



Q17. Level of Agreement With the Statement, “The Village of Pinehurst Welcome Center brings added value to my business”

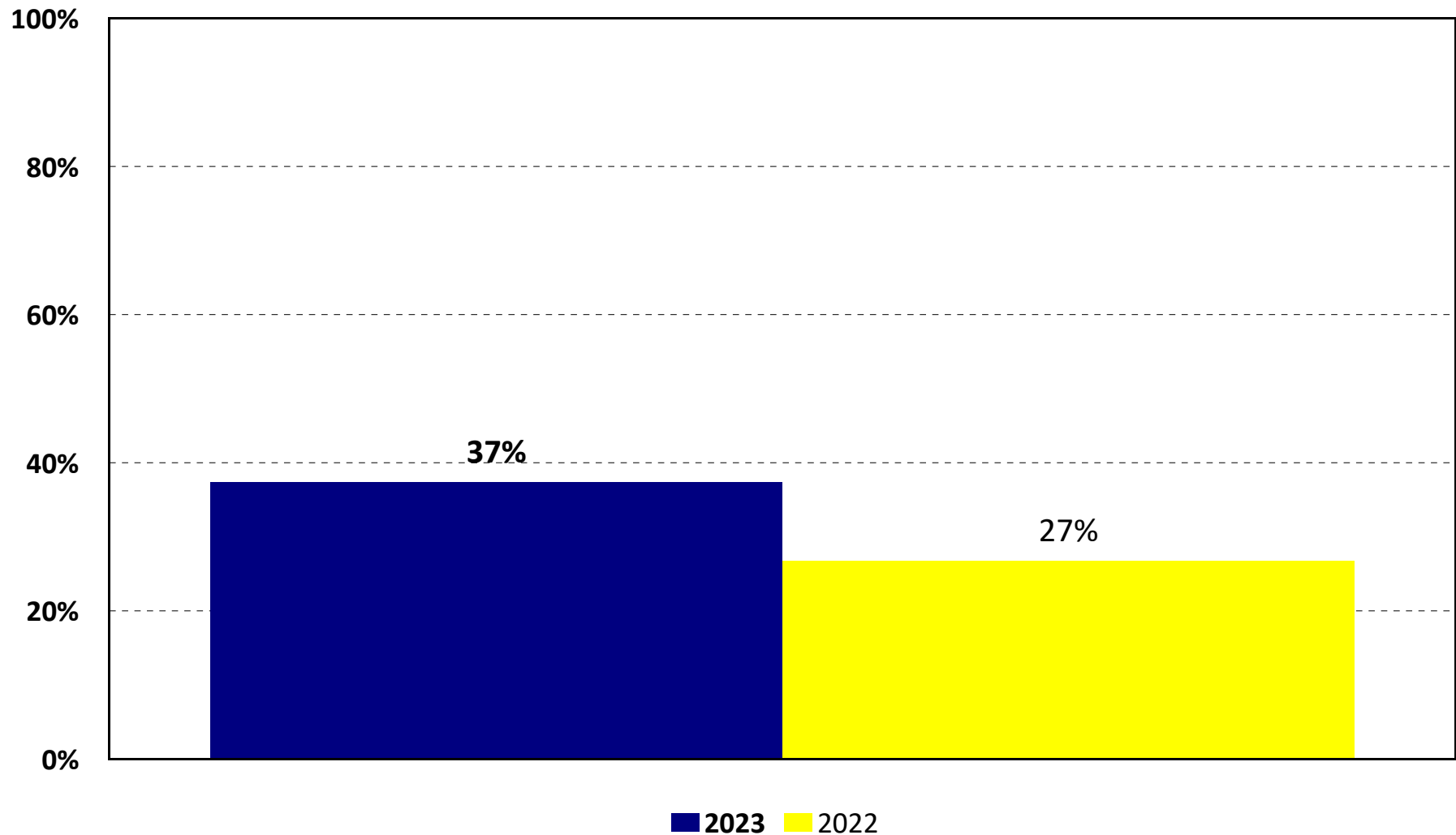
by percentage of respondents



■ Strongly agree ■ Agree ■ Neutral ■ Disagree ■ Strongly disagree ■ Don't know

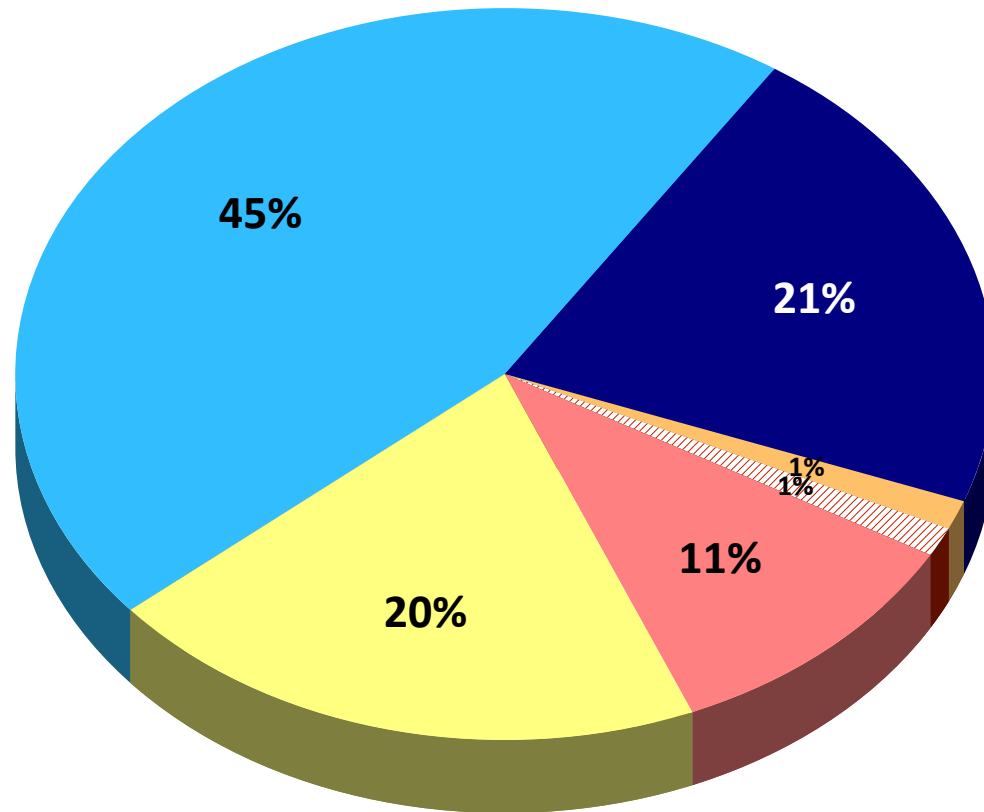
Q17. Level of Agreement With the Statement, “The Village of Pinehurst Welcome Center brings added value to my business” - 2022 vs. 2023

by percentage of respondents who “strongly agree” or “agree” with the statement



Q18. How satisfied are you with the way the Village handles events that attract large crowds to the Village?

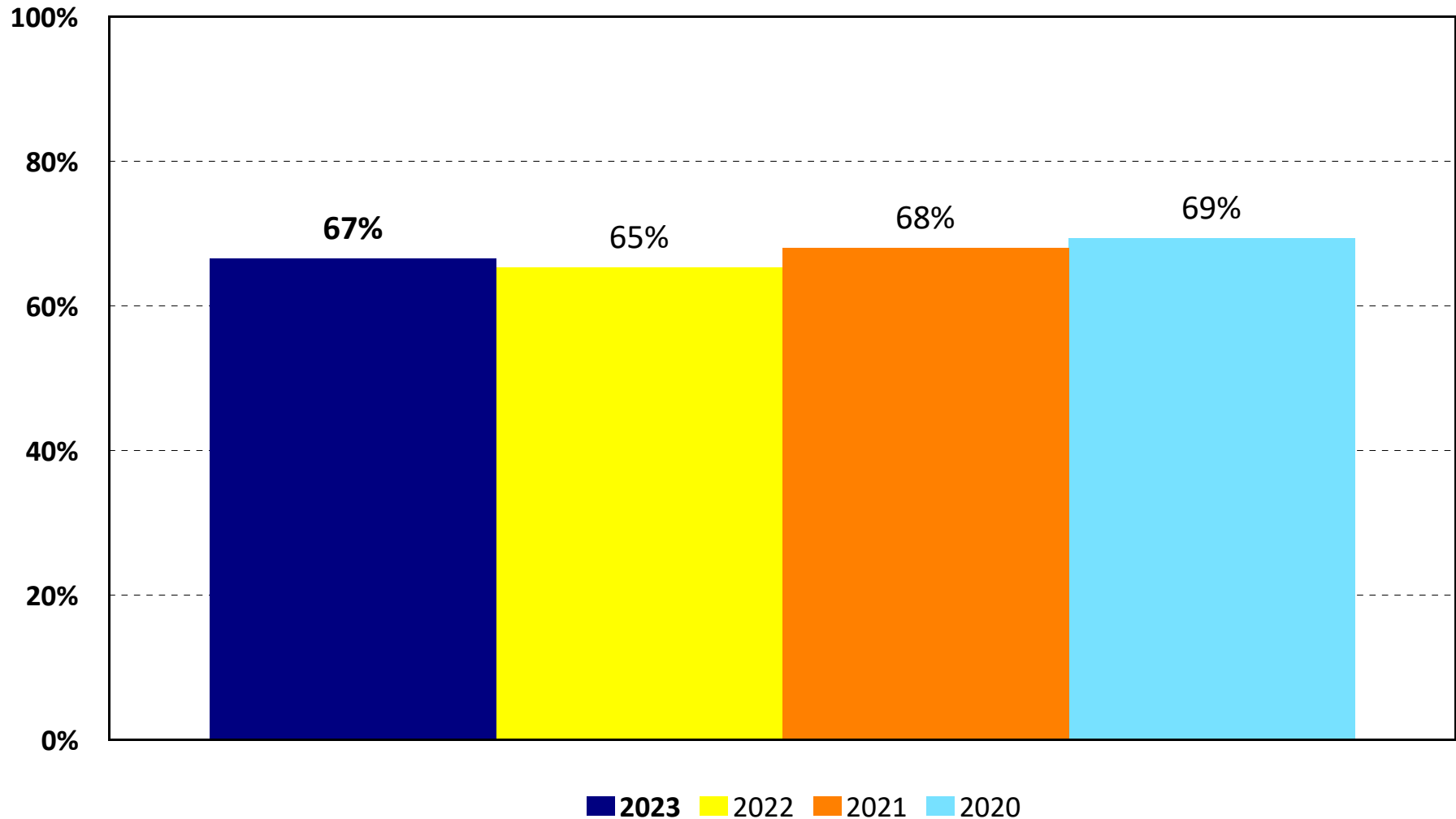
by percentage of respondents



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

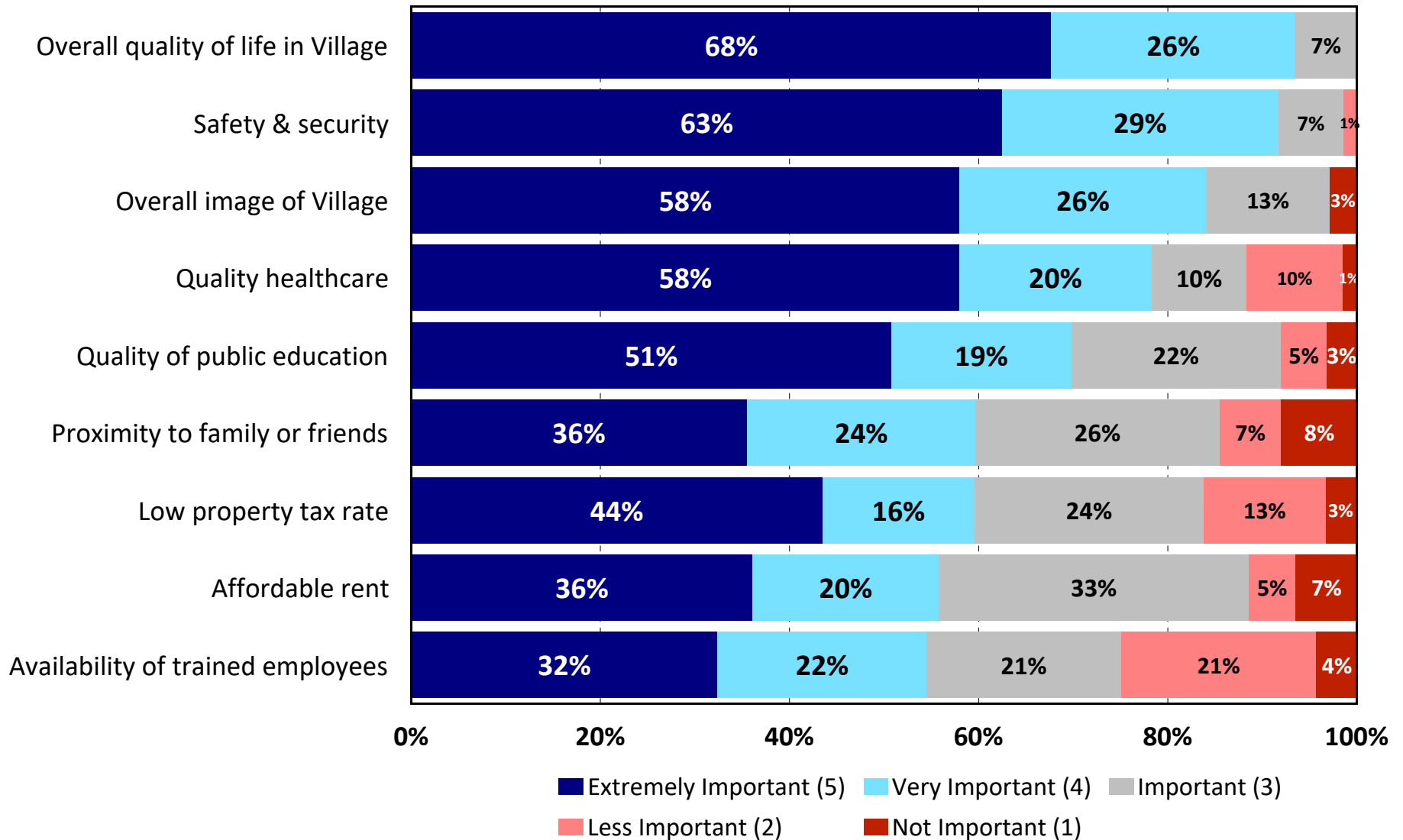
Q18. How satisfied are you with the way the Village handles events that attract large crowds to the Village? 2020 to 2023

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



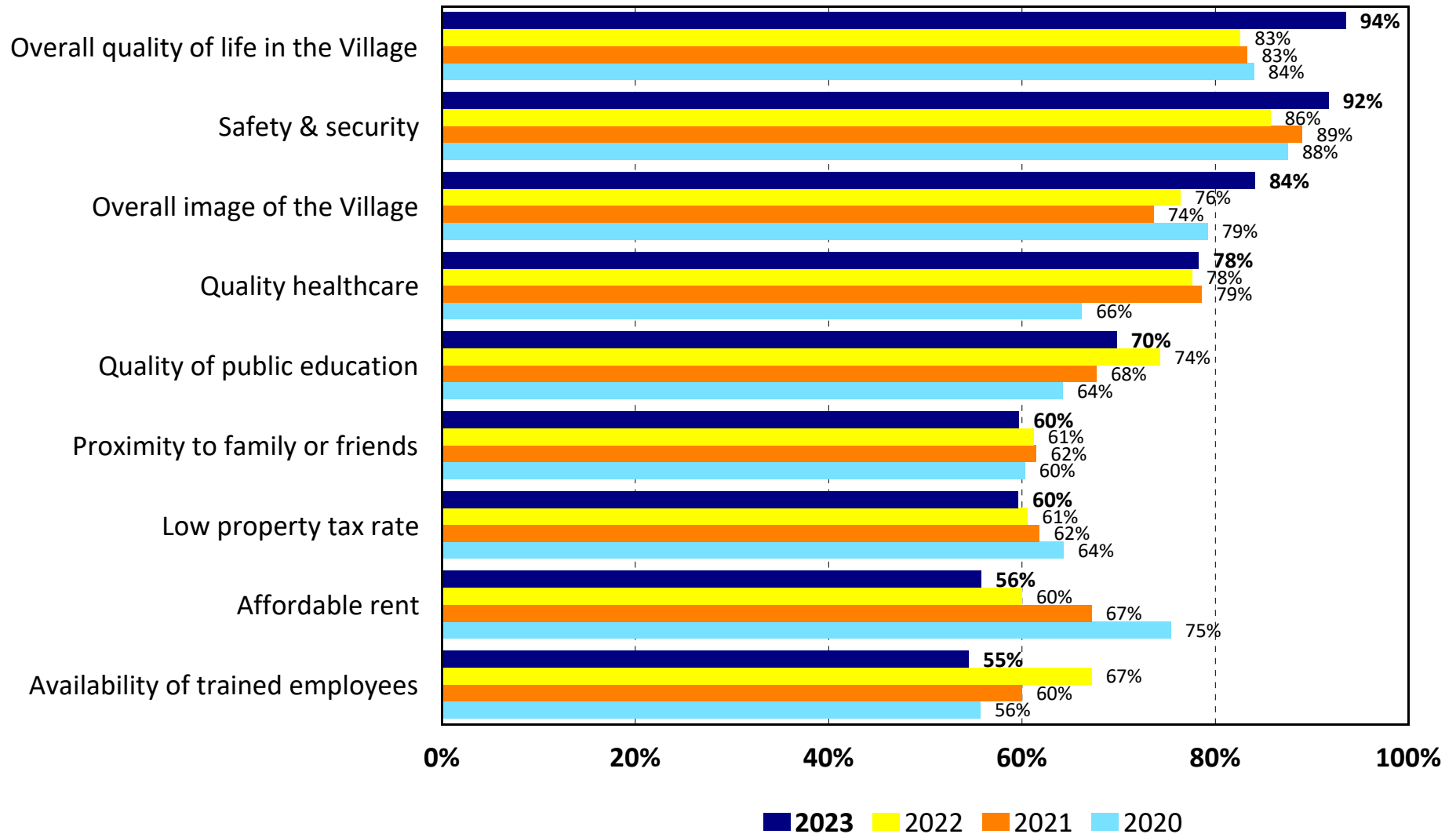
Q19. Importance of Various Reasons in Your Decision to Locate Your Business in the Village of Pinehurst

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



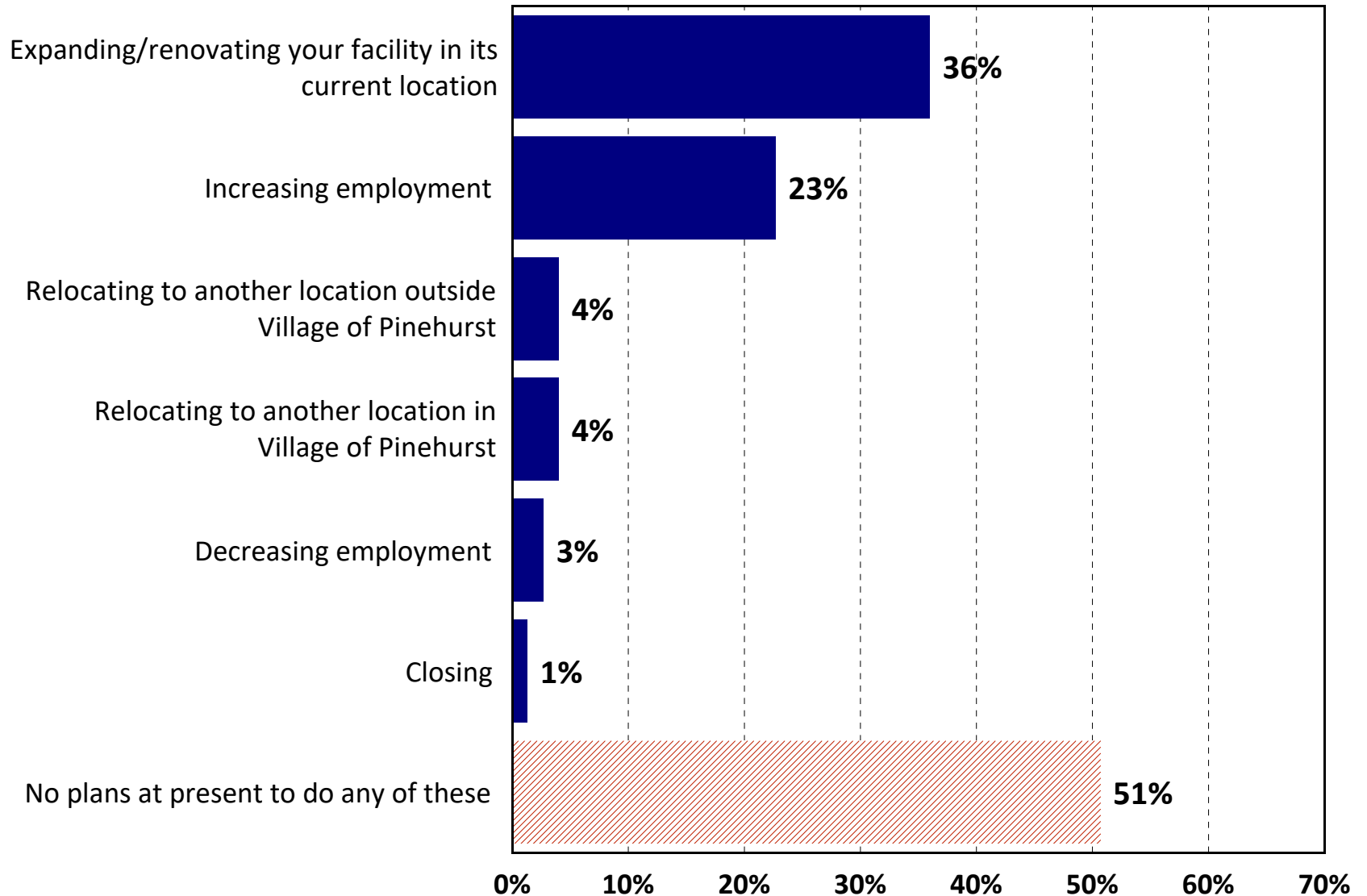
Q19. Importance of Various Reasons in Your Decision to Locate Your Business in the Village of Pinehurst 2020 to 2023

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



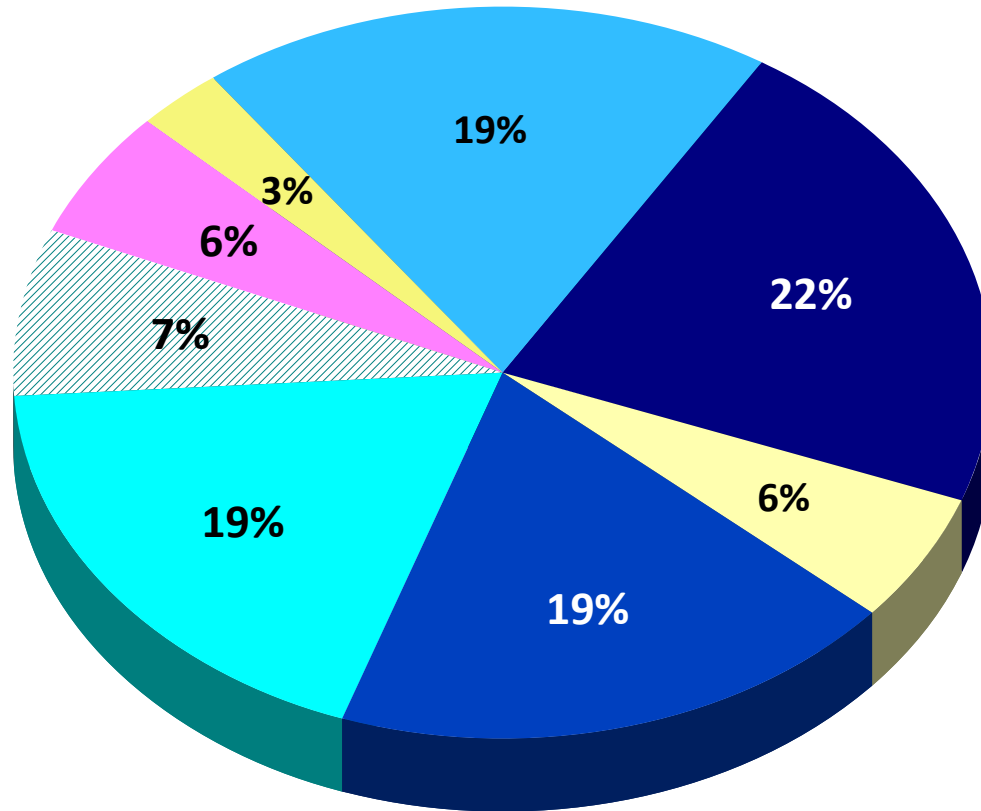
Q20. In the next three years, is your business planning to do any of the following?

by percentage of respondents



Q23. Primary Business Category

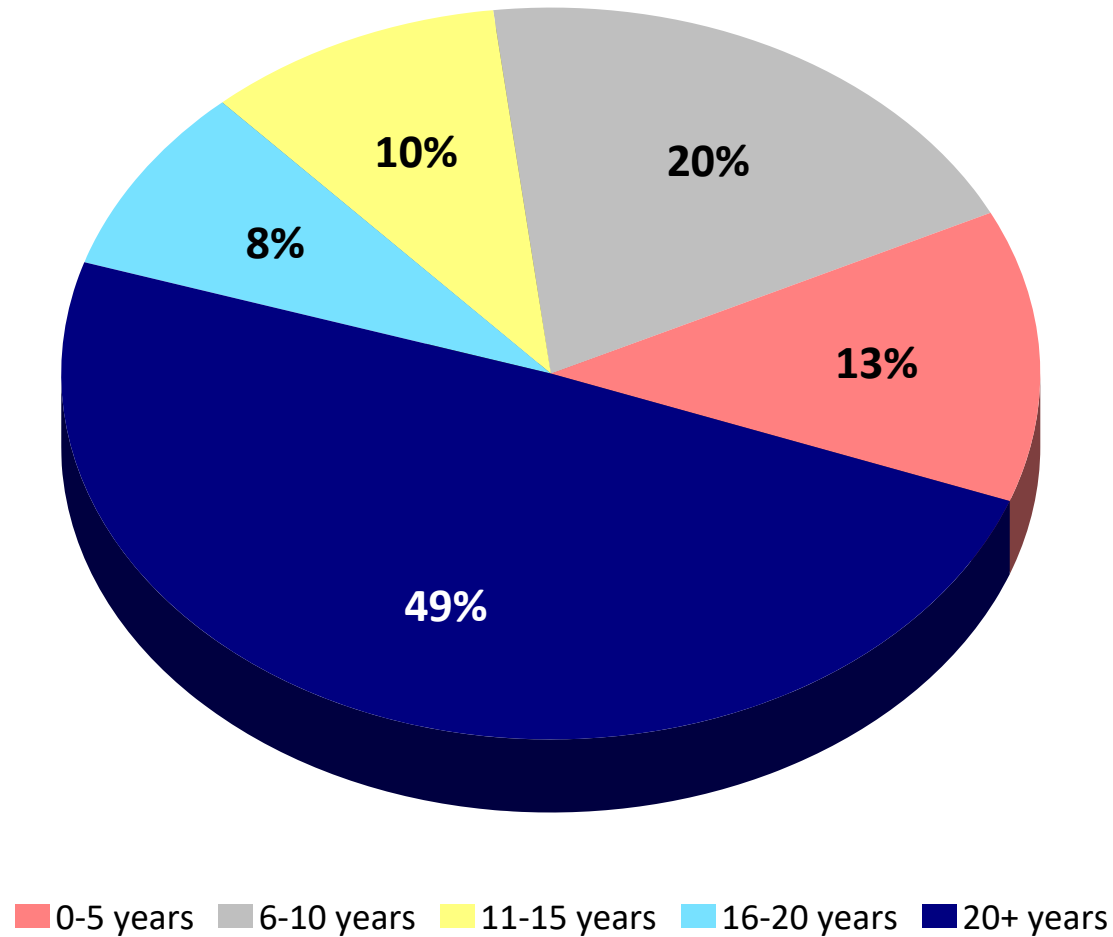
by percentage of respondents



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

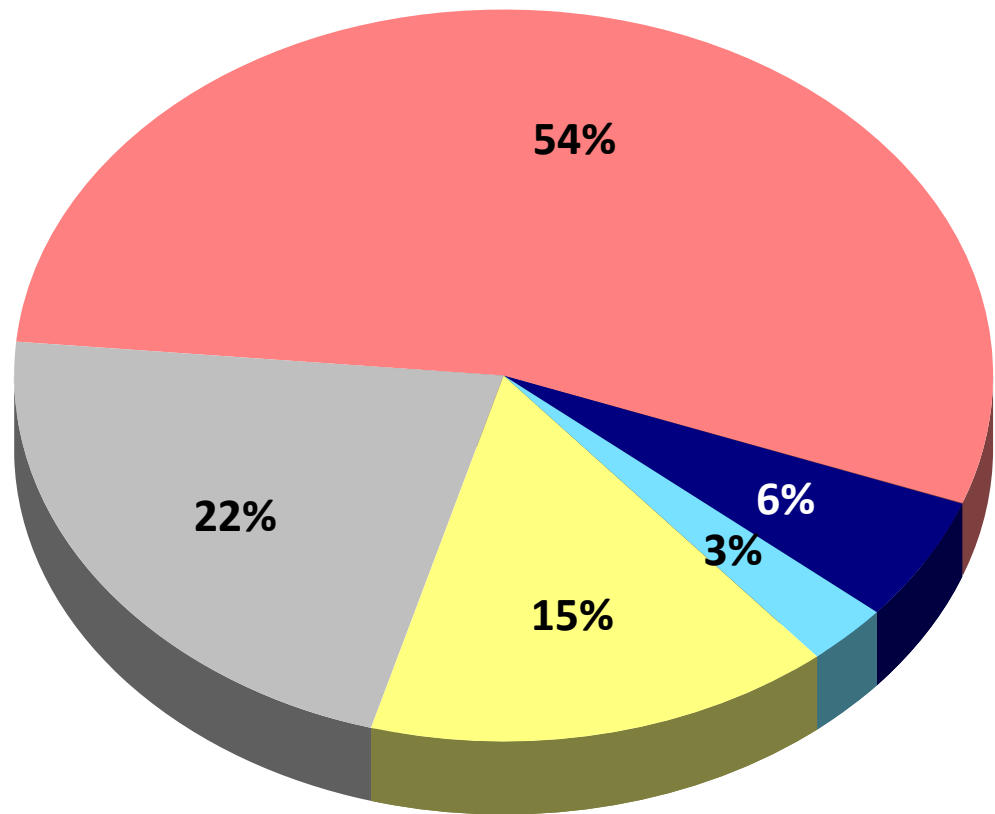
Q24. How many years have you been in operation in the Village?

by percentage of respondents (excluding "not provided")



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

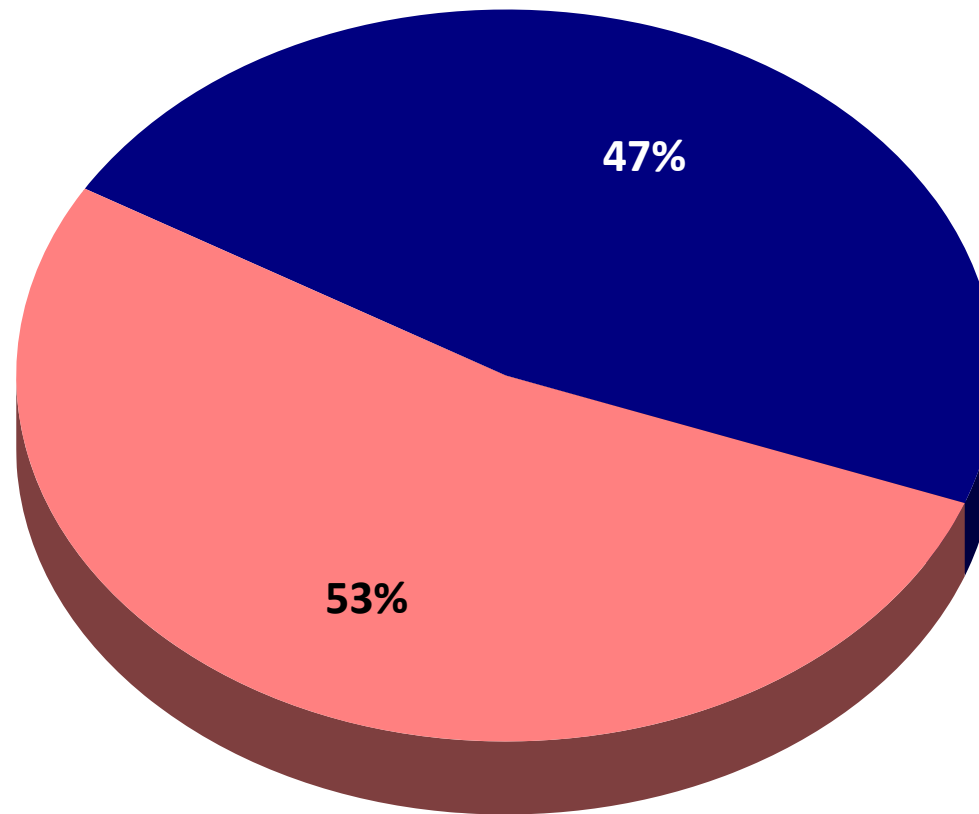
by percentage of respondents (excluding "not provided")



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

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

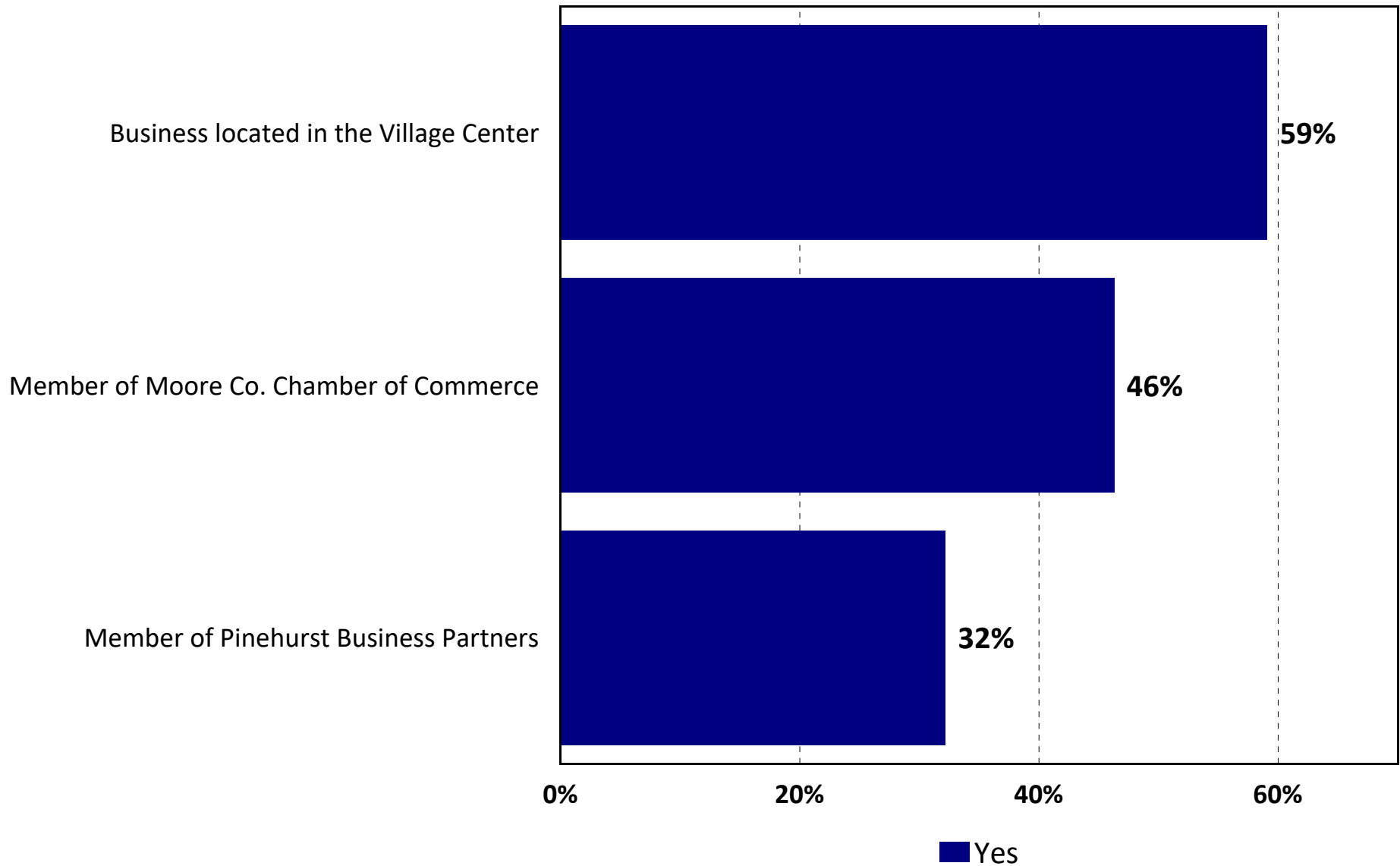
by percentage of respondents (excluding "not provided")



■ 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. More than half (56%) of respondents selected *Police Emergency Response* as one of the most important services for the Village to provide.

With regard to satisfaction, 90% of respondents surveyed rated the Village's overall performance of *Police Emergency Response* 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, 56% was multiplied by 10% (1-0.90). This yielded an I-S rating of 0.0560, which ranked first out of 9 major service categories.

The maximum rating is 1.00 and would be achieved when 100% of the respondents select an item as one of their top three choices to emphasize over the next two years and 0% indicate they are positively satisfied with the delivery of the service.

Importance-Satisfaction Analysis



The lowest rating is 0.00 and could be achieved under either of the following two situations:

- If 100% of the respondents were positively satisfied with the delivery of the service
- If none (0%) of the respondents selected the service as one for the three most important areas for the City to emphasize over the next two years.

Interpreting the Ratings

Ratings that are greater than or equal to 0.20 identify areas that should receive significantly more emphasis over the next two years. Ratings from 0.10 to 0.20 identify service areas that should receive increased emphasis. Ratings less than 0.10 should continue to receive the current level of emphasis.

- *Definitely Increase Emphasis* ($IS \geq 0.20$)
- *Increase Current Emphasis* ($0.10 \leq IS < 0.20$)
- *Maintain Current Emphasis* ($IS < 0.10$)

The results for the Village of Pinehurst Business Survey are provided on the following page.

2023 Importance-Satisfaction Rating

Village of Pinehurst, North Carolina Business Survey

Overall Satisfaction with Village Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Medium Priority (IS <.10)						
Police Emergency Response	56%	1	90%	4	0.0560	1
Streets & Grounds	40%	4	89%	5	0.0444	2
Fire Inspections	24%	5	83%	8	0.0401	3
Police Patrol	51%	3	94%	3	0.0289	4
Planning & Zoning	23%	6	88%	6	0.0284	5
Code Enforcement	12%	7	79%	9	0.0259	6
Building Inspections	5%	8	83%	7	0.0090	7
Fire Emergency Response	53%	2	100%	1	0.0000	8
Village Hall (Front Desk)	5%	9	100%	2	0.0000	9

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

Most Important %:

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

Satisfaction %:

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

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Importance-Satisfaction Analysis



Importance-Satisfaction Matrix Analysis

The Importance-Satisfaction rating is based on the concept that public agencies will maximize overall customer satisfaction by emphasizing improvements in those areas where the level of satisfaction is relatively low and the perceived importance of the service is relatively high. ETC Institute developed an Importance-Satisfaction Matrix to display the perceived importance of major services that were assessed on the survey against the perceived quality of service delivery. The two axes on the matrix represent Satisfaction (vertical) and relative Importance (horizontal).

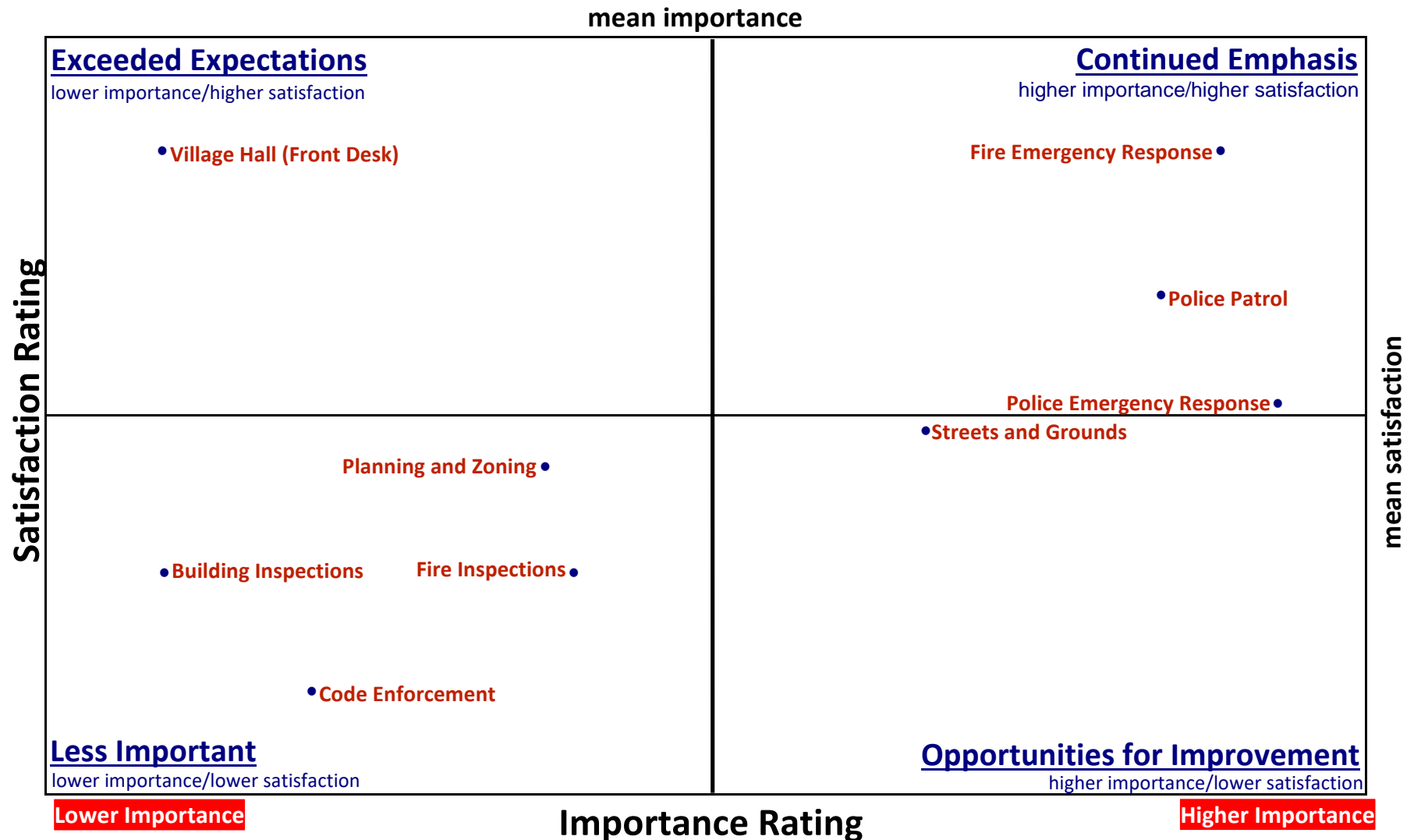
- **Continued Emphasis (above average importance and above average satisfaction).** This area shows where the Village is meeting customer expectations. Items in this area have a significant impact on the customer's overall level of satisfaction. The Village should maintain (or slightly increase) emphasis on items in this area.
- **Exceeding Expectations (below average importance and above average satisfaction).** This area shows where the Village is performing significantly better than customers expect the Village to perform. Items in this area do not significantly affect the overall level of satisfaction that residents have with Village services. The Village should maintain (or slightly decrease) emphasis on items in this area.
- **Opportunities for Improvement (above average importance and below average satisfaction).** This area shows where the Village is not performing as well as customers expect the Village to perform. This area has a significant impact on customer satisfaction, and the Village should DEFINITELY increase emphasis on items in this area.
- **Less Important (below average importance and below average satisfaction).** This area shows where the Village is not performing well relative to the Village's performance in other areas; however, this area is generally considered to be less important to residents. This area does not significantly affect overall satisfaction with Village services because the items are less important to residents. The agency should maintain current levels of emphasis on items in this area.

The matrix chart for the Village of Pinehurst Business Survey is provided on the following page.

2023 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)





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	24.0%	76.0%
Q1-2. Fire Inspections	64.0%	36.0%
Q1-3. Planning & Zoning	21.3%	78.7%
Q1-4. Code Enforcement	18.7%	81.3%
Q1-5. Police Patrol	46.7%	53.3%
Q1-6. Police Emergency Response	26.7%	73.3%
Q1-7. Fire Emergency Response	17.3%	82.7%
Q1-8. Village Hall (Front Desk)	16.0%	84.0%
Q1-9. Streets & Grounds	24.0%	76.0%

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=67)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q1-1. Building Inspections	38.9%	44.4%	16.7%	0.0%	0.0%
Q1-2. Fire Inspections	60.4%	22.9%	12.5%	0.0%	4.2%
Q1-3. Planning & Zoning	62.5%	25.0%	0.0%	12.5%	0.0%
Q1-4. Code Enforcement	35.7%	42.9%	7.1%	14.3%	0.0%
Q1-5. Police Patrol	82.9%	11.4%	0.0%	0.0%	5.7%
Q1-6. Police Emergency Response	75.0%	15.0%	0.0%	0.0%	10.0%
Q1-7. Fire Emergency Response	100.0%	0.0%	0.0%	0.0%	0.0%
Q1-8. Village Hall (Front Desk)	100.0%	0.0%	0.0%	0.0%	0.0%
Q1-9. Streets & Grounds	55.6%	33.3%	11.1%	0.0%	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	2	2.7 %
Fire Inspections	9	12.0 %
Planning & Zoning	8	10.7 %
Code Enforcement	2	2.7 %
Police Patrol	23	30.7 %
Police Emergency Response	15	20.0 %
Fire Emergency Response	8	10.7 %
Streets & Grounds	8	10.7 %
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	2	2.7 %
Fire Inspections	1	1.3 %
Planning & Zoning	6	8.0 %
Code Enforcement	2	2.7 %
Police Patrol	9	12.0 %
Police Emergency Response	17	22.7 %
Fire Emergency Response	21	28.0 %
Streets & Grounds	12	16.0 %
None chosen	5	6.7 %
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>
Fire Inspections	8	10.7 %
Planning & Zoning	3	4.0 %
Code Enforcement	5	6.7 %
Police Patrol	6	8.0 %
Police Emergency Response	10	13.3 %
Fire Emergency Response	11	14.7 %
Village Hall (Front Desk)	4	5.3 %
Streets & Grounds	10	13.3 %
None chosen	18	24.0 %
Total	75	100.0 %

SUM OF TOP 3 CHOICES

Q2. Which THREE of the Village services or departments listed in Question 1 are the MOST IMPORTANT to your business? (top 3)

<u>Q2. Sum of top 3 choices</u>	<u>Number</u>	<u>Percent</u>
Building Inspections	4	5.3 %
Fire Inspections	18	24.0 %
Planning & Zoning	17	22.7 %
Code Enforcement	9	12.0 %
Police Patrol	38	50.7 %
Police Emergency Response	42	56.0 %
Fire Emergency Response	40	53.3 %
Village Hall (Front Desk)	4	5.3 %
Streets & Grounds	30	40.0 %
Total	202	

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	Number	Percent
Significantly higher than your expectations	5	6.7 %
Higher than your expectations	15	20.0 %
Meets your expectations	42	56.0 %
Below your expectations	4	5.3 %
Significantly below your expectations	4	5.3 %
Don't know	5	6.7 %
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	Number	Percent
Significantly higher than your expectations	5	7.1 %
Higher than your expectations	15	21.4 %
Meets your expectations	42	60.0 %
Below your expectations	4	5.7 %
Significantly below your expectations	4	5.7 %
Total	70	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	18.7%	30.7%	30.7%	13.3%	5.3%	1.3%
Q4-2. Availability of employee & customer parking around your business	16.0%	25.3%	22.7%	20.0%	16.0%	0.0%
Q4-3. Condition of sidewalks	30.7%	30.7%	21.3%	8.0%	2.7%	6.7%
Q4-4. Creating & promoting special events	16.0%	45.3%	20.0%	12.0%	2.7%	4.0%
Q4-5. Historic preservation efforts	29.3%	40.0%	21.3%	0.0%	4.0%	5.3%
Q4-6. Cleanliness of Village streets & public areas	37.3%	40.0%	18.7%	2.7%	0.0%	1.3%
Q4-7. Landscape maintenance in rights-of-way & public areas	41.3%	38.7%	17.3%	2.7%	0.0%	0.0%
Q4-8. Level of involvement in local decisions	9.3%	25.3%	34.7%	6.7%	8.0%	16.0%

WITHOUT "DON'T KNOW"

Q4. Using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied," please indicate how satisfied your business is with the Village in the following areas. (without "don't know")

(N=75)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q4-1. Supporting business growth & development	18.9%	31.1%	31.1%	13.5%	5.4%
Q4-2. Availability of employee & customer parking around your business	16.0%	25.3%	22.7%	20.0%	16.0%
Q4-3. Condition of sidewalks	32.9%	32.9%	22.9%	8.6%	2.9%
Q4-4. Creating & promoting special events	16.7%	47.2%	20.8%	12.5%	2.8%
Q4-5. Historic preservation efforts	31.0%	42.3%	22.5%	0.0%	4.2%
Q4-6. Cleanliness of Village streets & public areas	37.8%	40.5%	18.9%	2.7%	0.0%
Q4-7. Landscape maintenance in rights-of-way & public areas	41.3%	38.7%	17.3%	2.7%	0.0%
Q4-8. Level of involvement in local decisions	11.1%	30.2%	41.3%	7.9%	9.5%

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	40.0%	48.0%	8.0%	2.7%	0.0%	1.3%
Q5-2. Overall quality of business environment	28.0%	32.0%	24.0%	12.0%	2.7%	1.3%
Q5-3. Overall affordability of employee housing	2.7%	13.3%	44.0%	16.0%	8.0%	16.0%
Q5-4. Overall feeling of safety	66.7%	32.0%	0.0%	0.0%	0.0%	1.3%
Q5-5. Quality of new commercial development in Village	18.7%	30.7%	22.7%	13.3%	1.3%	13.3%
Q5-6. Overall appearance of Village	56.0%	37.3%	5.3%	0.0%	0.0%	1.3%

WITHOUT "DON'T KNOW"

Q5. Perceptions of the Village. Several items that may influence your business's perception of the Village of Pinehurst are listed below. Please rate each item using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied." (without "don't know")

(N=75)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q5-1. Overall image of Village	40.5%	48.6%	8.1%	2.7%	0.0%
Q5-2. Overall quality of business environment	28.4%	32.4%	24.3%	12.2%	2.7%
Q5-3. Overall affordability of employee housing	3.2%	15.9%	52.4%	19.0%	9.5%
Q5-4. Overall feeling of safety	67.6%	32.4%	0.0%	0.0%	0.0%
Q5-5. Quality of new commercial development in Village	21.5%	35.4%	26.2%	15.4%	1.5%
Q5-6. Overall appearance of Village	56.8%	37.8%	5.4%	0.0%	0.0%

Q6. Thinking generally about the Village of Pinehurst, how likely would you be to recommend the Village as a business location to friends, family, and co-workers?

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

	Number	Percent
Very likely	28	37.3 %
Likely	22	29.3 %
Somewhat likely	15	20.0 %
Not likely	4	5.3 %
Not likely at all	5	6.7 %
Don't know	1	1.3 %
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	28	37.8 %
Likely	22	29.7 %
Somewhat likely	15	20.3 %
Not likely	4	5.4 %
Not likely at all	5	6.8 %
Total	74	100.0 %

Q7. Which of the following best describes the overall business atmosphere in the Village of Pinehurst today, compared to two years ago?

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

	Number	Percent
Better	23	30.7 %
No change, but good	33	44.0 %
Worse	8	10.7 %
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 of Pinehurst today compared to two years ago

	Number	Percent
Better	23	35.9 %
No change, but good	33	51.6 %
Worse	8	12.5 %
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	Significantly worse	No opinion
Q8-1. Overall quality of business environment	8.0%	25.3%	20.0%	2.7%	6.7%	37.3%
Q8-2. Overall quality of Village services	10.7%	30.7%	20.0%	4.0%	0.0%	34.7%
Q8-3. Customer service provided by Village employees	14.7%	22.7%	18.7%	4.0%	0.0%	40.0%

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	Significantly worse
Q8-1. Overall quality of business environment	12.8%	40.4%	31.9%	4.3%	10.6%
Q8-2. Overall quality of Village services	16.3%	46.9%	30.6%	6.1%	0.0%
Q8-3. Customer service provided by Village employees	24.4%	37.8%	31.1%	6.7%	0.0%

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

Q9. How would you rate Village of Pinehurst customer service	Number	Percent
Very good	20	26.7 %
Good	35	46.7 %
Poor	3	4.0 %
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 Village of Pinehurst customer service	Number	Percent
Very good	20	34.5 %
Good	35	60.3 %
Poor	3	5.2 %
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	30.7%	25.3%	10.7%	4.0%	2.7%	26.7%
Q10-2. Village staff was competent	34.7%	29.3%	8.0%	2.7%	0.0%	25.3%
Q10-3. Village staff was courteous	38.7%	26.7%	9.3%	0.0%	0.0%	25.3%
Q10-4. My issue was resolved promptly	20.0%	24.0%	14.7%	6.7%	4.0%	30.7%

WITHOUT "DON'T KNOW"

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

(N=75)

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
Q10-1. Village staff was responsive to my needs	41.8%	34.5%	14.5%	5.5%	3.6%
Q10-2. Village staff was competent	46.4%	39.3%	10.7%	3.6%	0.0%
Q10-3. Village staff was courteous	51.8%	35.7%	12.5%	0.0%	0.0%
Q10-4. My issue was resolved promptly	28.8%	34.6%	21.2%	9.6%	5.8%

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

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

	Number	Percent
Very satisfied	7	9.3 %
Satisfied	28	37.3 %
Neutral	21	28.0 %
Dissatisfied	7	9.3 %
Very dissatisfied	11	14.7 %
Don't know	1	1.3 %
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 the job Village of Pinehurst does communicating with business owners

	Number	Percent
Very satisfied	7	9.5 %
Satisfied	28	37.8 %
Neutral	21	28.4 %
Dissatisfied	7	9.5 %
Very dissatisfied	11	14.9 %
Total	74	100.0 %

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

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

	Number	Percent
Yes	41	54.7 %
No	34	45.3 %
Total	75	100.0 %

Q12a. Using a scale of 1 to 5, where 5 means "Very Good" and 1 means "Very Poor," please rate the Village website with regard to each of the following characteristics.

(N=41)

	Very good	Good	Average	Poor	Very poor
Q12a-1. Easy to navigate	4.9%	56.1%	34.1%	2.4%	2.4%
Q12a-2. Availability of information about Village services	12.2%	48.8%	29.3%	9.8%	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 of Pinehurst website

	Number	Percent
Very satisfied	3	7.3 %
Satisfied	25	61.0 %
Neutral	11	26.8 %
Very dissatisfied	1	2.4 %
Don't know	1	2.4 %
Total	41	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 of Pinehurst website

	Number	Percent
Very satisfied	3	7.5 %
Satisfied	25	62.5 %
Neutral	11	27.5 %
Very dissatisfied	1	2.5 %
Total	40	100.0 %

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

Q13. Have you used Village's mobile app (MY VOP) during last 12 months	Number	Percent
Yes	6	8.0 %
No	69	92.0 %
Total	75	100.0 %

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

Q13a. How satisfied were you with Village mobile app, MY VOP	Number	Percent
Very satisfied	2	33.3 %
Satisfied	3	50.0 %
Neutral	1	16.7 %
Total	6	100.0 %

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

Q14. Which following are the best ways for Village to communicate with you to get important information to your business	Number	Percent
Direct mail	24	32.0 %
Village website	14	18.7 %
Email (monthly business eNews)	49	65.3 %
Workshops/business forums	6	8.0 %
Social media	18	24.0 %
Personal calls/visits	26	34.7 %
Newsletters	16	21.3 %
Brochures	1	1.3 %
MY VOP mobile app	2	2.7 %
Engage Pinehurst online engagement portal (engage.vopnc. org)	3	4.0 %
Other	1	1.3 %
Total	160	

Q14-11. Other:

Q14-11. Other	Number	Percent
Text message	1	100.0 %
Total	1	100.0 %

Q15. Community Development. Using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied," please indicate how satisfied your business is with the following Village codes and ordinances.

(N=75)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q15-1. Zoning ordinances	8.0%	40.0%	29.3%	8.0%	2.7%	12.0%
Q15-2. Business signage regulations	12.0%	37.3%	28.0%	4.0%	6.7%	12.0%
Q15-3. Historic District Guidelines	24.0%	34.7%	21.3%	4.0%	0.0%	16.0%

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	9.1%	45.5%	33.3%	9.1%	3.0%
Q15-2. Business signage regulations	13.6%	42.4%	31.8%	4.5%	7.6%
Q15-3. Historic District Guidelines	28.6%	41.3%	25.4%	4.8%	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	52.0%	42.7%	0.0%	5.3%
Q16-2. Live After Five Concerts	24.0%	61.3%	6.7%	8.0%
Q16-3. Parades (e.g. Fourth of July, St. Patrick's Day, US Kids)	46.7%	44.0%	2.7%	6.7%
Q16-4. Holly Arts & Crafts Festival	53.3%	38.7%	4.0%	4.0%
Q16-5. Tree Lighting	50.7%	40.0%	2.7%	6.7%
Q16-6. Shakespeare in the Pines	33.3%	53.3%	0.0%	13.3%
Q16-7. Sandhills Motoring Festival	49.3%	44.0%	0.0%	6.7%
Q16-8. Other cultural activities (e.g., performing arts)	40.0%	45.3%	0.0%	14.7%

WITHOUT "DON'T KNOW"

Q16. Village Events. Using a scale of 1 to 3, where 3 means "Positive Impact" and 1 means "Negative Impact," please indicate the impact the following events in the Village Center have on your business. (without "don't know")

(N=75)

	Positive impact	No impact	Negative impact
Q16-1. Farmer's Markets	54.9%	45.1%	0.0%
Q16-2. Live After Five Concerts	26.1%	66.7%	7.2%
Q16-3. Parades (e.g. Fourth of July, St. Patrick's Day, US Kids)	50.0%	47.1%	2.9%
Q16-4. Holly Arts & Crafts Festival	55.6%	40.3%	4.2%
Q16-5. Tree Lighting	54.3%	42.9%	2.9%
Q16-6. Shakespeare in the Pines	38.5%	61.5%	0.0%
Q16-7. Sandhills Motoring Festival	52.9%	47.1%	0.0%
Q16-8. Other cultural activities (e.g., performing arts)	46.9%	53.1%	0.0%

Q17. Welcome Center. Please rate your level of agreement with the following statement: The Village of Pinehurst Welcome Center brings added value to my business.

Q17. The Village of Pinehurst Welcome Center brings added value to my business	Number	Percent
Strongly agree	11	14.7 %
Agree	17	22.7 %
Neutral	27	36.0 %
Disagree	5	6.7 %
Strongly disagree	4	5.3 %
Don't know	11	14.7 %
Total	75	100.0 %

WITHOUT "DON'T KNOW"

Q17. 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")

Q17. The Village of Pinehurst Welcome Center brings added value to my business	Number	Percent
Strongly agree	11	17.2 %
Agree	17	26.6 %
Neutral	27	42.2 %
Disagree	5	7.8 %
Strongly disagree	4	6.3 %
Total	64	100.0 %

Q18. 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)?

Q18. How satisfied are you with the way Village handles events that attract large crowds to Village	Number	Percent
Very satisfied	16	21.3 %
Satisfied	34	45.3 %
Neutral	15	20.0 %
Dissatisfied	8	10.7 %
Very dissatisfied	1	1.3 %
Don't know	1	1.3 %
Total	75	100.0 %

WITHOUT "DON'T KNOW"

Q18. 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")

Q18. How satisfied are you with the way Village handles events that attract large crowds to Village	Number	Percent
Very satisfied	16	21.6 %
Satisfied	34	45.9 %
Neutral	15	20.3 %
Dissatisfied	8	10.8 %
Very dissatisfied	1	1.4 %
Total	74	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	53.3%	24.0%	12.0%	0.0%	2.7%	8.0%
Q19-2. Safety & security	60.0%	28.0%	6.7%	1.3%	0.0%	4.0%
Q19-3. Availability of trained employees	29.3%	20.0%	18.7%	18.7%	4.0%	9.3%
Q19-4. Low property tax rate	36.0%	13.3%	20.0%	10.7%	2.7%	17.3%
Q19-5. Quality healthcare	53.3%	18.7%	9.3%	9.3%	1.3%	8.0%
Q19-6. Affordable rent	29.3%	16.0%	26.7%	4.0%	5.3%	18.7%
Q19-7. Proximity to family or friends	29.3%	20.0%	21.3%	5.3%	6.7%	17.3%
Q19-8. Quality of public education	42.7%	16.0%	18.7%	4.0%	2.7%	16.0%
Q19-9. Overall quality of life in Village	56.0%	21.3%	5.3%	0.0%	0.0%	17.3%

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	58.0%	26.1%	13.0%	0.0%	2.9%
Q19-2. Safety & security	62.5%	29.2%	6.9%	1.4%	0.0%
Q19-3. Availability of trained employees	32.4%	22.1%	20.6%	20.6%	4.4%
Q19-4. Low property tax rate	43.5%	16.1%	24.2%	12.9%	3.2%
Q19-5. Quality healthcare	58.0%	20.3%	10.1%	10.1%	1.4%
Q19-6. Affordable rent	36.1%	19.7%	32.8%	4.9%	6.6%
Q19-7. Proximity to family or friends	35.5%	24.2%	25.8%	6.5%	8.1%
Q19-8. Quality of public education	50.8%	19.0%	22.2%	4.8%	3.2%
Q19-9. Overall quality of life in Village	67.7%	25.8%	6.5%	0.0%	0.0%

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	27	36.0 %
Relocating to another location in Village of Pinehurst	3	4.0 %
Relocating to another location outside Village of Pinehurst	3	4.0 %
Decreasing employment	2	2.7 %
Increasing employment	17	22.7 %
Closing	1	1.3 %
No plans at present to do any of these	38	50.7 %
Total	91	

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

Q20-2. Where	Number	Percent
Magnolia	1	33.3 %
One block away	1	33.3 %
Renting or building a medical facility near the Hospital	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
Foot traffic	1	33.3 %
Visibility	1	33.3 %
Outgrown our current office space	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?

Q20-3. What city/where	Number	Percent
TN or FL	1	100.0 %
Total	1	100.0 %

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

Q20-3. Why	Number	Percent
Taxes and ease of approvals for modifications to business location	1	100.0 %
Total	1	100.0 %

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

Q20-4. Anticipated number of layoffs	Number	Percent
3	1	50.0 %
4	1	50.0 %
Total	2	100.0 %

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

Q20-5. Anticipated number of new hires	Number	Percent
1	2	11.8 %
2	5	29.4 %
3	3	17.6 %
4+	6	35.3 %
Not provided	1	5.9 %
Total	17	100.0 %

WITHOUT "NOT PROVIDED"**Q20-5. Please indicate the anticipated number of new hires: (without "not provided")**

Q20-5. Anticipated number of new hires	Number	Percent
1	2	12.5 %
2	5	31.3 %
3	3	18.8 %
4+	6	37.5 %
Total	16	100.0 %

Q20-5. Please indicate the HOURLY Wage Level:

<u>Q20-5. Hourly wage level</u>	<u>Number</u>	<u>Percent</u>
9	1	7.1 %
15	3	21.4 %
16	1	7.1 %
17	1	7.1 %
18	1	7.1 %
19	2	14.3 %
20	5	35.7 %
Total	14	100.0 %

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

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

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

- Can't find good employees
- Comprehensive planning for increased in and around the Village.
- Congestion
- Convenient parking.
- Expansion efforts create a lot of congestion on Hwy 5-grid lock.
- Growing too fast, infrastructure not keeping up.
- Growth
- Growth, traffic, parking
- Infrastructure on the growth. Water flow issues and future needs.
- Lack of direct communication regarding matters directly affecting business owners.
Lost potential in the ability to be a destination space for shopping & dining with multiple spaces being taken by Real Estate offices. Long-term goals seem not to reflect the general consensus of the people that live here and pour back into it everyday (Harness Track Plans, etc.)
Dealing with fast, large, growth appropriately.
- Lack of parking
- Live at 5 decreases business on a Friday night for restaurants. That is our busiest night but not when there is a Live at 5. Include local businesses in that event or perhaps hold on a Saturday night.
- Need for a more vibrant core. Changed brought on by USGA arrival.
- No attention to business development to meet local and tourist expectations.
- Over population of families in the area, congested roads (especially near schools and events)
- Overgrowth with lack of infrastructure.
- Parking
- Parking
- Parking
- Parking
- Parking
- Parking
- Parking. Lack of ! No more real estate offices. Lunch options.
- Pinehurst remaining relevant.
- Planning for growth
- Population Growth Management
- Property tax increase
- Qualified employees
- Quality healthcare. Some of their ordinances are a problem.
- The police are very disrespectful, they talk down to you, not to you.
- There is room enough to add another parking space in front of my storefront. The city came and measured and said there was enough and nothing ever happen!
- Traffic
- Traffic and getting to big.
- Traffic and parking. We don't know the impact on our business with the new USGA buildings. Storm water work
- Traffic circles are intense.
- Traffic Demands and Safety, Public School capacity

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

- Village is dying a slow death - its beautiful and charming, but soon, the resort village in Aberdeen will be the Favored destination for tourists.
- Village Mgr. Does Not Make Owners Maintain Exterior Of Building. Market Square Looks Like A Run-Down Area- Its a disaster.

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

- Assist in facilities safety and security
- Avoid tax increase
- Better communication and execution on matters that directly affect us daily (parking).
- Come and listen to the business owners.
Surveys are very misleading.
- Commercial development.
- Communicate-zero communication.
- Continued communication.
- Difficult for employees to get to work when an event is going on.
- Does moving live after five to the Netherlands assist businesses THAT PAY RENT or does it assist food trucks who do not? Really, guys, this is ridiculous.
- Don't schedule events beyond walking distance from village shops and restaurants.
- Don't close streets before 5 pm. Enforce signage restrictions outside businesses.
- During tournaments caddy's park where employees park. Keep the quaintness of the Village.
- Eliminate short term rental ordinance.
- ENFORCE PARKING. BUILD A PARKING LOT. ASK DRIVERS TO PARK ELSEWHERE IF MORE THAN 2 HOURS. VILLAGE DOES NOTHING TO MAKE IT BETTER FOR BUSINESSES-WELCOME CENTER HARDLY OPEN
- Highlight Small Business Owners, including small medical practices like Sandhills Orthotics & Prosthetics
- Keep quality employees
- Less relator agencies and more RETAILORS!
- Live after Five: In the Village center or cancel it
- Live at 5 decreases business on a Friday night for restaurants. That is our busiest night but not when there is a Live at 5. Include local businesses in that event or perhaps hold on a Saturday night.
- Meet with Businesses and Building Owners - I have never been to a meeting in 10 years with a village where all businesses and building owners were invited. When I say never, I mean never in the past ten years - I remember it occurring 11 or 12 years ago by Natalie Hawkins.
- Parking garage.
- Permits are given to favorites, this is not fair.
- We are a small non-profit but feel that the Village is strict with Signage issues, water and flooding, and restrictions on outside renovations
- With the new road construction at the intersection of Hwy 15/501 and Memorial Drive, many cars still turn right On RED, even with the two signs posted. While it is new to everyone, I had noticed a great improvement of the flow to the circle when drivers did honor this sign and not pile into the line for the circle.

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

<u>Q23. Primary business category for your business</u>	<u>Number</u>	<u>Percent</u>
Retail	15	20.0 %
Restaurants & food services	13	17.3 %
Inn	2	2.7 %
Professional, scientific, & technical services	4	5.3 %
Financial & insurance	5	6.7 %
Real estate & rental leasing	13	17.3 %
Health care & social assistance	13	17.3 %
Other	4	5.3 %
Not provided	6	8.0 %
Total	75	100.0 %

WITHOUT "NOT PROVIDED"**Q23. Business Category. Please indicate the primary business category of your business. (without "not provided")**

<u>Q23. Primary business category for your business</u>	<u>Number</u>	<u>Percent</u>
Retail	15	21.7 %
Restaurants & food services	13	18.8 %
Inn	2	2.9 %
Professional, scientific, & technical services	4	5.8 %
Financial & insurance	5	7.2 %
Real estate & rental leasing	13	18.8 %
Health care & social assistance	13	18.8 %
Other	4	5.8 %
Total	69	100.0 %

Q23-9. Other

<u>Q23-9. Other</u>	<u>Number</u>	<u>Percent</u>
Church	2	50.0 %
Non-profit	1	25.0 %
Retail/office/educational	1	25.0 %
Total	4	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	9	12.0 %
6-10 years	14	18.7 %
11-15 years	7	9.3 %
16-20 years	6	8.0 %
20+ years	35	46.7 %
Not provided	4	5.3 %
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	9	12.7 %
6-10 years	14	19.7 %
11-15 years	7	9.9 %
16-20 years	6	8.5 %
20+ years	35	49.3 %
Total	71	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	39	52.0 %
10-24	16	21.3 %
25-49	11	14.7 %
50-99	2	2.7 %
100+	4	5.3 %
Not provided	3	4.0 %
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	39	54.2 %
10-24	16	22.2 %
25-49	11	15.3 %
50-99	2	2.8 %
100+	4	5.6 %
Total	72	100.0 %

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

Q26. Is your personal residence in Village of Pinehurst	Number	Percent
Yes	32	42.7 %
No	36	48.0 %
Not provided	7	9.3 %
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	32	47.1 %
No	36	52.9 %
Total	68	100.0 %

Q27. Please answer the following questions.

(N=75)

	Yes	No	Not provided
Q27-1. Are you a member of Pinehurst Business Partners	25.3%	53.3%	21.3%
Q27-2. Are you a member of Moore County Chamber of Commerce	33.3%	38.7%	28.0%
Q27-3. Is your business located in Village Center	52.0%	36.0%	12.0%

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	32.2%	67.8%
Q27-2. Are you a member of Moore County Chamber of Commerce	46.3%	53.7%
Q27-3. Is your business located in Village Center	59.1%	40.9%

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

4 Survey Instrument



HISTORY, CHARM, AND SOUTHERN HOSPITALITY _____

July 2023

Dear Village of Pinehurst Business Leader,

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 *PinehurstBusinessSurvey.com*.

The survey data will be collected by ETC Institute, one of the nation's leading governmental research firms. Village staff will receive the survey results, without identifying information, from ETC Institute for further analysis. Results will be presented to the Pinehurst Village Council at a public meeting in September. Please join us to hear the results!

If you have any questions about the survey, please contact me at 295-1900, ext. 1101. Thank you for participating in the 2023 Business Survey.

Sincerely,

Jeffrey M. Sanborn
Village Manager

ADMINISTRATION

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



2023 Village of Pinehurst Business Survey

Please take a few minutes to complete this survey. Your input is an important part of the Village's ongoing effort to identify and respond to business concerns. If you have questions, please contact Jeff Sanborn, Village Manager at (910) 295-1900, ext. 1101 or at jsanborn@vopnc.org.

1. **Community Service Satisfaction.** Please indicate if your business has used each of the services or departments listed below in the past year. If "Yes," please rate the service or department using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

		Has your business used this service or department in the past year?		Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
1.	Building Inspections	Yes	No	5	4	3	2	1	9
2.	Fire Inspections	Yes	No	5	4	3	2	1	9
3.	Planning and Zoning	Yes	No	5	4	3	2	1	9
4.	Code Enforcement	Yes	No	5	4	3	2	1	9
5.	Police Patrol	Yes	No	5	4	3	2	1	9
6.	Police Emergency Response	Yes	No	5	4	3	2	1	9
7.	Fire Emergency Response	Yes	No	5	4	3	2	1	9
8.	Village Hall (Front Desk)	Yes	No	5	4	3	2	1	9
9.	Streets and Grounds	Yes	No	5	4	3	2	1	9

2. **Which THREE of the Village services or departments listed above are the MOST IMPORTANT to your business?** [Write in your answers below using the numbers from the list in Question 1.]

1st: ____ 2nd: ____ 3rd: ____

3. **In general, how satisfied are you with the overall quality of services provided to your business by the Village of Pinehurst? Would you say the quality of services provided is...**

____ (1) Significantly higher than your expectations ____ (4) Below your expectations
 ____ (2) Higher than your expectations ____ (5) Significantly below your expectations
 ____ (3) Meets your expectations ____ (9) Don't know

4. **Using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied," please indicate how satisfied your business is with the Village in the following areas.**

		Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
1.	Supporting business growth and development	5	4	3	2	1	9
2.	Availability of employee and customer parking around your business	5	4	3	2	1	9
3.	Condition of sidewalks	5	4	3	2	1	9
4.	Creating and promoting special events	5	4	3	2	1	9
5.	Historic preservation efforts	5	4	3	2	1	9
6.	Cleanliness of Village streets and public areas	5	4	3	2	1	9
7.	Landscape maintenance in rights-of-way and public areas	5	4	3	2	1	9
8.	Level of involvement in local decisions	5	4	3	2	1	9

5. **Perceptions of the Village.** Several items that may influence your business's perception of the Village of Pinehurst are listed below. Please rate each item using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

		Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
1.	Overall image of the Village	5	4	3	2	1	9
2.	Overall quality of the business environment	5	4	3	2	1	9
3.	Overall affordability of employee housing	5	4	3	2	1	9
4.	Overall feeling of safety	5	4	3	2	1	9
5.	Quality of new commercial development in the Village	5	4	3	2	1	9
6.	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 the business environment	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. **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

18. **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

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?

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

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 | <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?

- | | | |
|---|--|--|
| <input type="checkbox"/> (1) 0-5 years | <input type="checkbox"/> (3) 11-15 years | <input type="checkbox"/> (5) 20+ years |
| <input type="checkbox"/> (2) 6-10 years | <input type="checkbox"/> (4) 16-20 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.