

The background of the cover is a photograph of a golf course. On the left, there is a large, two-story clubhouse with a red roof and white columns. In the middle ground, a golfer is visible on a green. The foreground shows some dry, brownish grass. A large, dark blue arrow-shaped graphic points from the top right towards the center, partially overlapping the text.

2024 Village of Pinehurst Community Survey Findings Report

Presented to the Village of Pinehurst,
North Carolina

October 2024



Contents

Executive Summary	i
Section 1: Charts and Graphs	1
Section 2: Benchmarking Analysis	63
Section 3: Importance-Satisfaction Analysis.....	88
Section 4: Tabular Data	102
Section 5: Survey Instrument	158



Executive Summary

2024 Village of Pinehurst Community Survey

Executive Summary



Purpose and Methodology

ETC Institute administered a survey to residents of the Village of Pinehurst during the summer of 2024. The purpose of the survey was to help Village leaders and elected officials set community priorities including staffing and budget expenditures. The survey and its data will also help the Village determine areas or services that need improvement and identify future needs. This is the thirteenth survey administered for the Village; previous community surveys have been conducted annually since 2012.

The seven-page survey and cover letter were mailed to a random sample of households in the Village of Pinehurst. The cover letter explained the purpose of the survey and encouraged residents to either return their survey by mail or complete the survey online. Ten days after the surveys were mailed, ETC Institute sent follow-up messages to the households that received the survey to encourage participation. The follow-up messages contained a link to the online version of the survey to make it easy for residents to complete the survey. At the end of the online survey, residents were asked to enter their home address; this was done to ensure that only responses from residents who were part of the random sample were included in the final survey database.

The goal was to obtain completed surveys from at least 700 residents. The goal was met, with a total of 711 residents completing the survey. The overall results for the sample of 711 households have a precision of at least $\pm 3.7\%$ at the 95% level of confidence.

The percentage of “don’t know” responses has been excluded from many of the graphs shown in this report to facilitate valid comparisons of the results from Pinehurst with the results from other communities in ETC Institute’s *DirectionFinder*® database. 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),
- benchmarking data that show how the results for the Village compare to other communities (Section 2),
- Importance-Satisfaction analysis; this analysis was done to determine priority actions for the Village to address based upon the survey results (Section 3),
- tables that show the results of the random sample for each question on the survey (Section 4),
- a copy of the survey instrument (Section 5).

2024 Village of Pinehurst Community Survey

Executive Summary



Overall Perceptions of the Village

Nearly all residents surveyed (98%), *who had an opinion*, indicated that their overall feeling of safety in the Village is either an “excellent” or “good.” Ninety-seven percent (97%) of those surveyed, *who had an opinion*, indicated the Village is either “excellent” or “good,” as a place to live, and 97% *who had an opinion* think the overall image and overall quality of life in the Village is “excellent” or “good.”

Overall Satisfaction with Village Services

The major categories of Village services that had the highest levels of satisfaction, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: fire services (98%), police services (94%), and solid waste services (93%). Village leaders have done a great job of ensuring overall satisfaction among residents is very high. The areas residents thought should receive the most emphasis from the Village over the next two years were: (1) efforts at maintain the quality of neighborhoods, (2) street and right-of-way maintenance, and (3) enforcement of Village codes and ordinances.

Perceptions of Safety and Security

Ninety-nine percent (99%) of respondents, *who had an opinion*, indicated they feel either “very safe” or “safe” walking alone in their neighborhood during the day, and 99% of residents, *who had an opinion*, indicated they feel either “very safe” or “safe” in business areas of the Village during the day.

Satisfaction with Specific Village Services

Public Safety Services. The highest levels of satisfaction with public safety services, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: how quickly police respond to emergencies (90%), how quickly fire personnel respond to emergencies (89%), and efforts to prevent crimes (89%). The public safety service that respondents were least satisfied with was fire prevention and education programs (61%). Respondents indicated that the Village’s efforts to prevent crimes is the public safety service they think should receive the most emphasis from Village leaders over the next two years.

Solid Waste Services. Ninety-four percent (94%) of residents *who had an opinion* were satisfied with residential trash collection services; 92% were satisfied with yard waste collection services, and 90% were satisfied with curbside recycling services.

2024 Village of Pinehurst Community Survey

Executive Summary



Cultural and Recreation Services. The highest levels of satisfaction with cultural and recreation services, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: quality of Village parks (89%), the number of Village parks (86%), the availability of walking/greenway trails (80%), and the condition of walking/greenway trails (78%). The three cultural and recreation services respondents indicated should receive the most emphasis over the next two years were (1) the condition of walking/greenway trails, (2) the quality of Village parks, and (3) the availability of walking/greenway trails.

Code Enforcement. The highest levels of satisfaction with Village code enforcement, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: the enforcement of solid waste cart regulations (68%), enforcing the cleanup of litter and debris on private property (61%), and enforcing sign regulations (59%). Fifty-seven percent (57%) of respondents described the effort the Village applies to enforce its codes and ordinances as “about right,” 6% indicated it is “too much,” 21% indicated it is “too little,” and 16% did not have an opinion.

Transportation Services. The highest levels of satisfaction with transportation services, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: the maintenance of main Village street thoroughfares (90%), the ease of travel on other streets in the Village (83%), and the maintenance of street signs and pavement markings (81%). The ease of travel on NC Highway 5 and the ease of travel through large traffic circle were the two transportation services respondents think should receive the most emphasis from the Village over the next two years.

Public Services. The highest levels of satisfaction with public services, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: cleanliness of streets and other public areas (95%) and landscaping in medians/other public areas (95%). The quality of stormwater runoff/management system and the cleanliness of streets and other public areas were the two public services respondents think should receive the most emphasis from the Village over the next two years.

Public Communication and Outreach. The highest levels of satisfaction with public communication and outreach, based upon the combined percentage of “very satisfied” and “satisfied” responses among residents *who had an opinion*, were: the quality of information on Village programs and services (77%), efforts to keep residents informed about local issues (77%), and the Village newsletter (75%).

- The Pilot newspaper (66%) and the Village Newsletter (61%) are the two most used sources for information about the Village of Pinehurst.
- Eighty-nine percent (89%) of respondents indicated they read the Village Newsletter either “all the time” or “sometimes.”

2024 Village of Pinehurst Community Survey Executive Summary



Village Leadership. Seventy-two percent (72%) of residents *who had an opinion* were satisfied with the effectiveness of the Village Manager and appointed staff; 69% were satisfied with the quality of leadership provided by elected officials, and 64% were satisfied with the effectiveness of appointed boards and commissions.

2024 Village of Pinehurst Community Survey

Executive Summary



How the Village Compares to Other Communities Nationally

Satisfaction ratings for the Village of Pinehurst **rated significantly higher (difference of 5% or more) than the U.S. average in 44 of the 45 areas** that were assessed. Listed below are the comparisons between the Village of Pinehurst and the U.S. average:

Service	Pinehurst	U.S.	Difference	Category
As a place to live	97.4%	48.5%	48.9%	Perceptions of the Village
Customer service provided by Village employees	85.5%	39.4%	46.1%	Major Categories of Community Services
Maintenance/preservation of Downtown	93.5%	47.7%	45.8%	Public Services
Village communication with residents	81.8%	36.9%	44.9%	Major Categories of Community Services
As a place to retire	95.9%	51.6%	44.3%	Perceptions of the Village
Overall image of Village	97.4%	53.4%	44.0%	Perceptions of the Village
Overall quality of Village services	92.7%	49.0%	43.7%	Perceptions of the Village
Cleanliness of streets & other public areas	94.8%	53.3%	41.5%	Public Services
Police services	93.8%	53.0%	40.8%	Major Categories of Community Services
Efforts to prevent crimes	88.9%	48.6%	40.3%	Public Safety Services
Maintenance of main Village street thoroughfares	89.6%	50.1%	39.5%	Transportation Services
Landscaping in medians/other public areas	94.6%	55.4%	39.2%	Public Services
Yard waste collection services	92.2%	53.8%	38.4%	Solid Waste Services
Solid waste services	93.3%	55.1%	38.2%	Major Categories of Community Services
Street & right-of-way maintenance	76.9%	40.5%	36.4%	Major Categories of Community Services
How quickly police respond to emergencies	90.3%	56.1%	34.2%	Public Safety Services
In Village parks & recreation facilities	88.7%	54.6%	34.1%	Perceptions of Safety and Security
Curbside recycling services	89.5%	55.6%	33.9%	Solid Waste Services
Effectiveness of Village Manager & appointed staff	71.8%	38.2%	33.6%	Village Leadership
Efforts to keep you informed about local issues	76.7%	43.3%	33.4%	Communication
Overall feeling of safety in Village	98.0%	66.0%	32.0%	Perceptions of the Village
Village website	74.2%	42.4%	31.8%	Communication
Quality of info about Village programs/services	77.2%	46.4%	30.8%	Communication
Quality of leadership by elected officials	68.6%	38.4%	30.2%	Village Leadership
Level of public involvement in local decisions	62.5%	33.9%	28.6%	Major Categories of Community Services
Village social media	66.4%	39.3%	27.1%	Communication
Residential trash collection services	94.3%	67.5%	26.8%	Solid Waste Services
Maintenance of streets in your neighborhood	73.1%	49.3%	23.8%	Transportation Services
Enforcement of local traffic laws	71.3%	49.6%	21.7%	Public Safety Services
Fire services	97.5%	76.2%	21.3%	Major Categories of Community Services
Walking alone in your neighborhood after dark	81.1%	61.4%	19.7%	Perceptions of Safety and Security
As a place to raise children	80.6%	61.4%	19.2%	Perceptions of the Village
Enforcement of Village codes & ordinances	58.7%	40.1%	18.6%	Major Categories of Community Services
Maintenance of street signs/pavement markings	80.8%	63.1%	17.7%	Transportation Services
Winter weather response on Village streets	75.6%	58.1%	17.5%	Public Services
Walking alone in your neighborhood during the day	98.7%	81.2%	17.5%	Perceptions of Safety and Security
How quickly fire personnel respond to emergencies	89.0%	71.7%	17.3%	Public Safety Services
Condition of existing walkways	63.8%	46.7%	17.1%	Transportation Services
Enforcing cleanup of litter & debris	61.3%	45.1%	16.2%	Code Enforcement
Quality of stormwater runoff/management system	65.5%	49.5%	16.0%	Public Services
Enforcing sign regulations	58.5%	44.9%	13.6%	Code Enforcement
Fire prevention & education programs	61.4%	48.6%	12.8%	Public Safety Services
Enforcing mowing/cutting of weeds/grass	57.2%	46.1%	11.1%	Code Enforcement
Frequency police officers patrol your neighborhood	63.2%	54.1%	9.1%	Public Safety Services
Adequacy of street lighting	51.7%	58.5%	-6.8%	Transportation Services

2024 Village of Pinehurst Community Survey

Executive Summary



How the Village Compares to Other Communities Regionally

Satisfaction ratings for the Village of Pinehurst **rated significantly higher (difference of 5% or more) than the Atlantic regional average in 42 of the 45 areas** that were assessed. Listed below are the comparisons between the Village of Pinehurst and the average for the Atlantic Region:

Service	Pinehurst	Atlantic Region	Difference	Category
Customer service provided by Village employees	85.5%	36.3%	49.2%	Major Categories of Community Services
Maintenance/preservation of Downtown	93.5%	49.8%	43.7%	Public Services
Overall quality of Village services	92.7%	51.6%	41.1%	Perceptions of the Village
As a place to retire	95.9%	55.1%	40.8%	Perceptions of the Village
As a place to live	97.4%	58.0%	39.4%	Perceptions of the Village
Cleanliness of streets & other public areas	94.8%	55.6%	39.2%	Public Services
Yard waste collection services	92.2%	56.2%	36.0%	Solid Waste Services
Village communication with residents	81.8%	48.1%	33.7%	Major Categories of Community Services
Efforts to prevent crimes	88.9%	55.3%	33.6%	Public Safety Services
Police services	93.8%	60.3%	33.5%	Major Categories of Community Services
Maintenance of main Village street thoroughfares	89.6%	56.6%	33.0%	Transportation Services
Overall image of Village	97.4%	64.7%	32.7%	Perceptions of the Village
Landscaping in medians/other public areas	94.6%	61.9%	32.7%	Public Services
Village website	74.2%	42.2%	32.0%	Communication
Effectiveness of Village Manager & appointed staff	71.8%	40.9%	30.9%	Village Leadership
Quality of leadership by elected officials	68.6%	37.8%	30.8%	Village Leadership
Solid waste services	93.3%	63.7%	29.6%	Major Categories of Community Services
Street & right-of-way maintenance	76.9%	48.2%	28.7%	Major Categories of Community Services
In Village parks & recreation facilities	88.7%	60.9%	27.8%	Perceptions of Safety and Security
Quality of info about Village programs/services	77.2%	50.0%	27.2%	Communication
Overall feeling of safety in Village	98.0%	71.0%	27.0%	Perceptions of the Village
Curbside recycling services	89.5%	62.5%	27.0%	Solid Waste Services
Efforts to keep you informed about local issues	76.7%	51.2%	25.5%	Communication
Level of public involvement in local decisions	62.5%	37.7%	24.8%	Major Categories of Community Services
Village social media	66.4%	42.3%	24.1%	Communication
Enforcement of Village codes & ordinances	58.7%	36.9%	21.8%	Major Categories of Community Services
Maintenance of streets in your neighborhood	73.1%	51.3%	21.8%	Transportation Services
How quickly police respond to emergencies	90.3%	69.8%	20.5%	Public Safety Services
Residential trash collection services	94.3%	74.1%	20.2%	Solid Waste Services
Walking alone in your neighborhood during the day	98.7%	81.4%	17.3%	Perceptions of Safety and Security
Maintenance of street signs/pavement markings	80.8%	63.5%	17.3%	Transportation Services
Winter weather response on Village streets	75.6%	58.3%	17.3%	Public Services
Enforcing sign regulations	58.5%	44.4%	14.1%	Code Enforcement
Condition of existing walkways	63.8%	49.9%	13.9%	Transportation Services
As a place to raise children	80.6%	67.3%	13.3%	Perceptions of the Village
Enforcing mowing/cutting of weeds/grass	57.2%	44.3%	12.9%	Code Enforcement
Fire services	97.5%	85.3%	12.2%	Major Categories of Community Services
Enforcement of local traffic laws	71.3%	59.7%	11.6%	Public Safety Services
Walking alone in your neighborhood after dark	81.1%	70.3%	10.8%	Perceptions of Safety and Security
How quickly fire personnel respond to emergencies	89.0%	79.1%	9.9%	Public Safety Services
Enforcing cleanup of litter & debris	61.3%	52.5%	8.8%	Code Enforcement
Fire prevention & education programs	61.4%	53.2%	8.2%	Public Safety Services
Quality of stormwater runoff/management system	65.5%	64.3%	1.2%	Public Services
Frequency police officers patrol your neighborhood	63.2%	64.5%	-1.3%	Public Safety Services
Adequacy of street lighting	51.7%	60.4%	-8.7%	Transportation Services

2024 Village of Pinehurst Community Survey

Executive Summary



Trends Since 2023

From 2023 to 2024, satisfaction ratings have increased in 88 of the 96 areas that were assessed. There were significant increases in satisfaction (5% or more) in 29 of these areas. The 29 areas that have increased 5% or more since 2023 are listed below.

- Quality of leadership provided by elected officials (+23.7%)
- Ease of travel through large traffic circle (+22.1%)
- Effectiveness of appointed boards and commissions (+18.5%)
- Level of public involvement in local decisions (+13.9%)
- Effectiveness of Village Manager and appointed staff (+13.4%)
- Ease of travel on NC Highway 5 (+10.3%)
- Efforts to keep residents informed about local issues (+10%)
- Progress toward strategic vision and mission (+8.4%)
- West Pinehurst Park (e.g. disc golf) (+8%)
- Efforts at maintaining quality of neighborhoods (+7.9%)
- Ease of travel on other streets in the Village (+7.6%)
- Community Center (+7.2%)
- Village social media (+7.2%)
- Village communication with residents (+7%)
- Feeling of safety in business areas of the Village after dark (+6.9%)
- Online engagement portals (+6.9%)
- Village website (vopnc.org) (+6.5%)
- Overall quality of Village services (+6.4%)
- Splash pad at Wicker Park (+6.2%)
- Quality of information about Village programs and services (+6.2%)
- Opportunities to participate in local government (+6.2%)
- Feeling of safety in Village parks and recreation facilities (+5.9%)
- Efforts to prevent crimes (+5.8%)
- Availability of walkways (+5.5%)
- Variety of amenities in recreation indoor facilities (+5.3%)
- Parks and recreation facilities (+5.2%)
- How quickly police respond to emergencies (+5.2%)
- Monthly Village e-News updates (+5%)
- Adequacy of street lighting (+5%)

2024 Village of Pinehurst Community Survey Executive Summary



Investment Priorities

Recommended Priorities for the Next Two Years. In order to help the Village identify investment priorities for the next two years, ETC Institute conducted an Importance-Satisfaction (I-S) analysis. This analysis examined the importance residents placed on each Village service and the level of satisfaction with each service. By identifying services of high importance and low satisfaction, the analysis identified which services will have the most impact on overall satisfaction with Village services over the next two years. If the Village wants to improve its overall satisfaction rating, they should prioritize investments in services with the highest Importance-Satisfaction (I-S) ratings. Details regarding the methodology for the analysis are provided in Section 3 of this report.

Overall Priorities for the Village by Major Category. This analysis reviewed the importance of and satisfaction with major categories of Village services. This analysis was conducted to help set the overall priorities for the Village. Based on the results of this analysis, the major service that is recommended as the top priority for investment over the next two years in order to raise the Village’s overall satisfaction rating is listed below:

- Enforcement of Village codes and ordinances (I-S Rating = 0.1313)

The table below shows the Importance-Satisfaction rating for all 13 major categories of Village services that were rated.

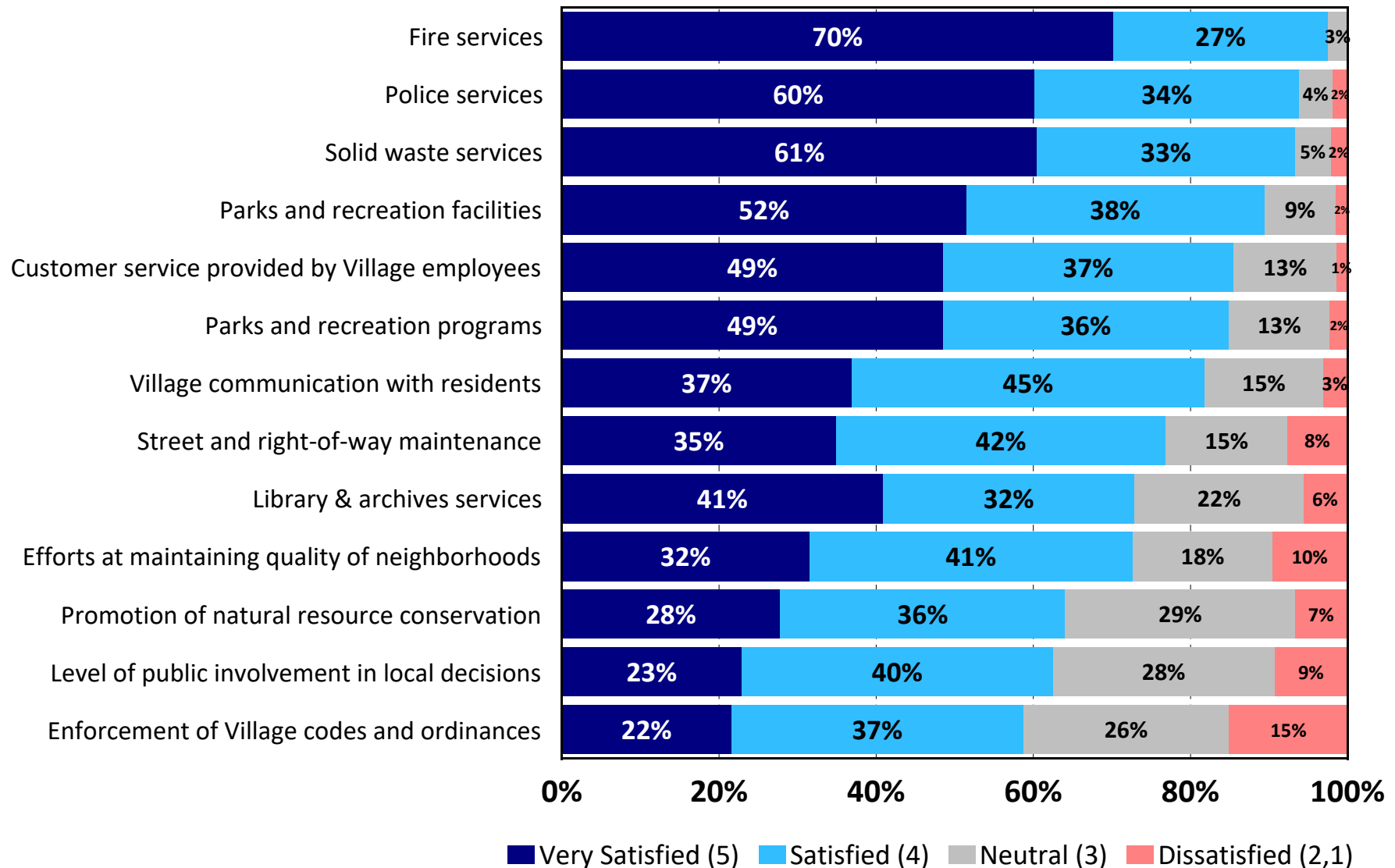
2024 Importance-Satisfaction Rating Village of Pinehurst, North Carolina Overall Satisfaction with Village Services						
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS .10-.20)						
Enforcement of Village codes and ordinances	32%	3	59%	13	0.1313	1
Medium Priority (IS <.10)						
Level of public involvement in local decisions	26%	5	63%	12	0.0964	2
Efforts at maintaining quality of neighborhoods	34%	1	73%	10	0.0936	3
Street and right-of-way maintenance	34%	2	77%	8	0.0774	4
Promotion of natural resource conservation	18%	8	64%	11	0.0628	5
Library & archives services	13%	10	73%	9	0.0363	6
Village communication with residents	20%	6	82%	7	0.0357	7
Parks and recreation programs	13%	9	85%	6	0.0202	8
Police services	31%	4	94%	2	0.0194	9
Parks and recreation facilities	12%	11	89%	4	0.0131	10
Customer service provided by Village employees	5%	13	86%	5	0.0078	11
Solid waste services	10%	12	93%	3	0.0064	12
Fire services	18%	7	98%	1	0.0044	13



Charts and Graphs

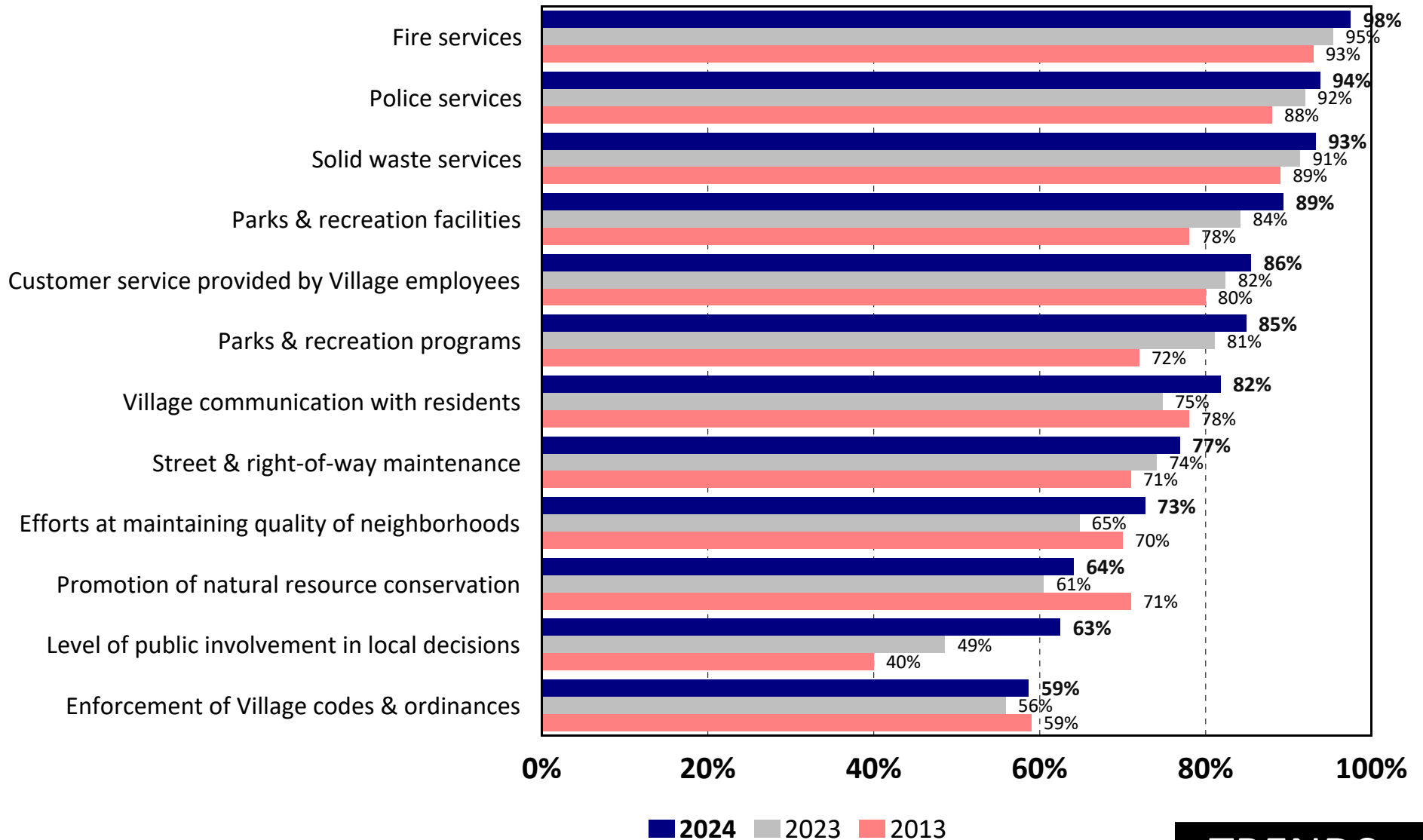
Q1. Overall Satisfaction with Village of Pinehurst Services by Major Category

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



Q1. Overall Satisfaction with Village of Pinehurst Services by Major Category - 2024, 2023 & 2013

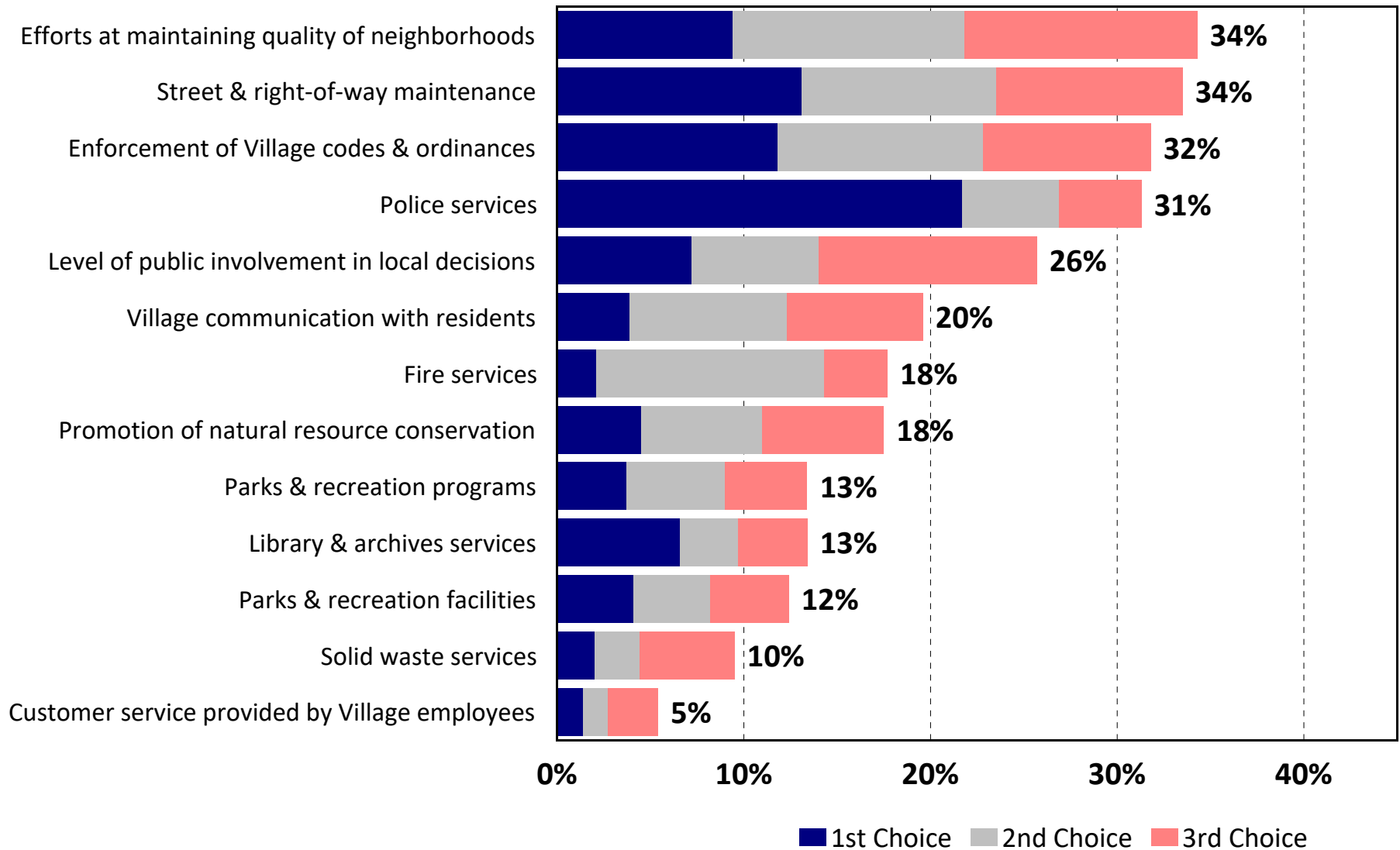
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding “no opinion”)



TRENDS

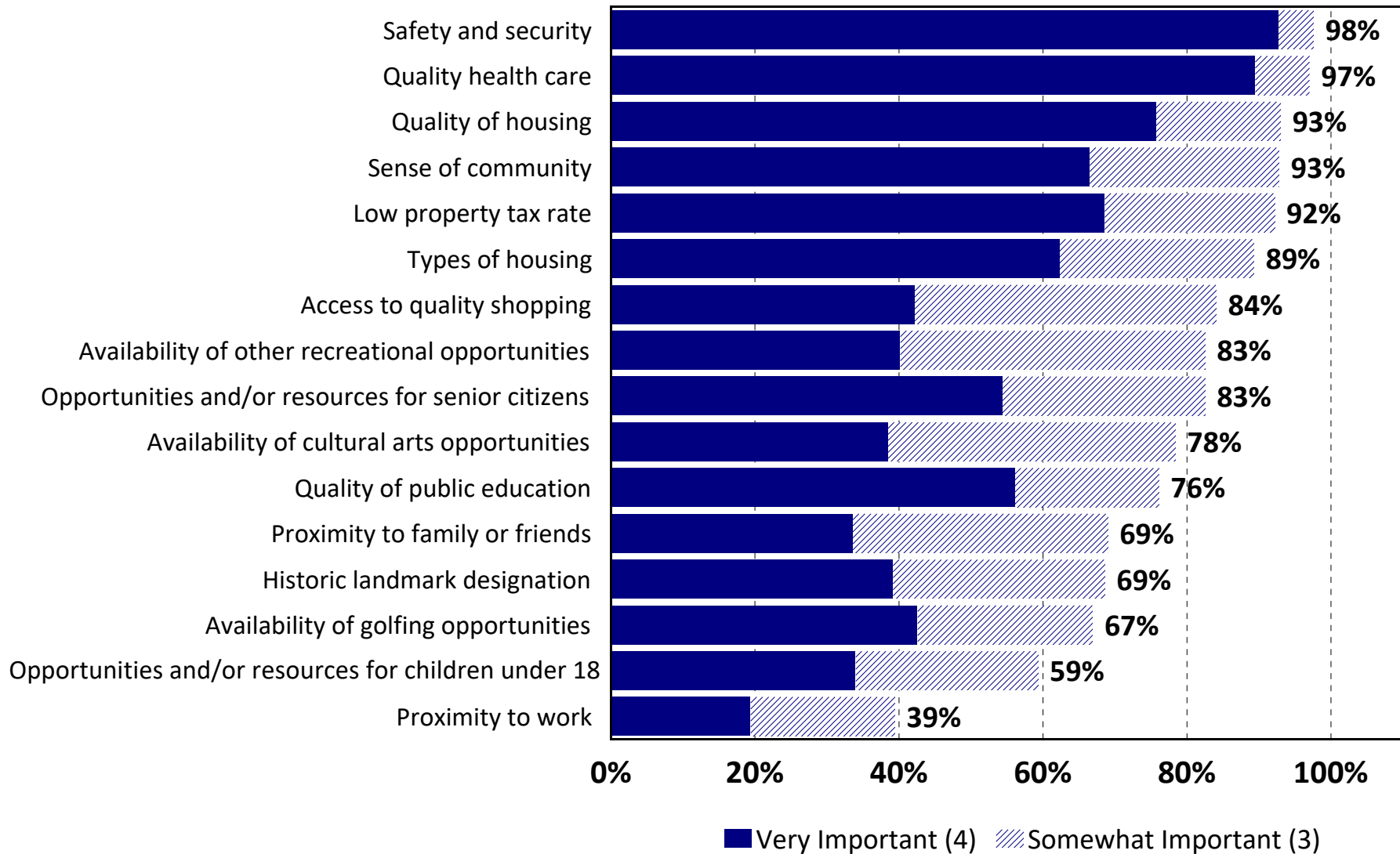
Q2. Village Services That Should Receive the Most Emphasis Over the Next Two Years

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



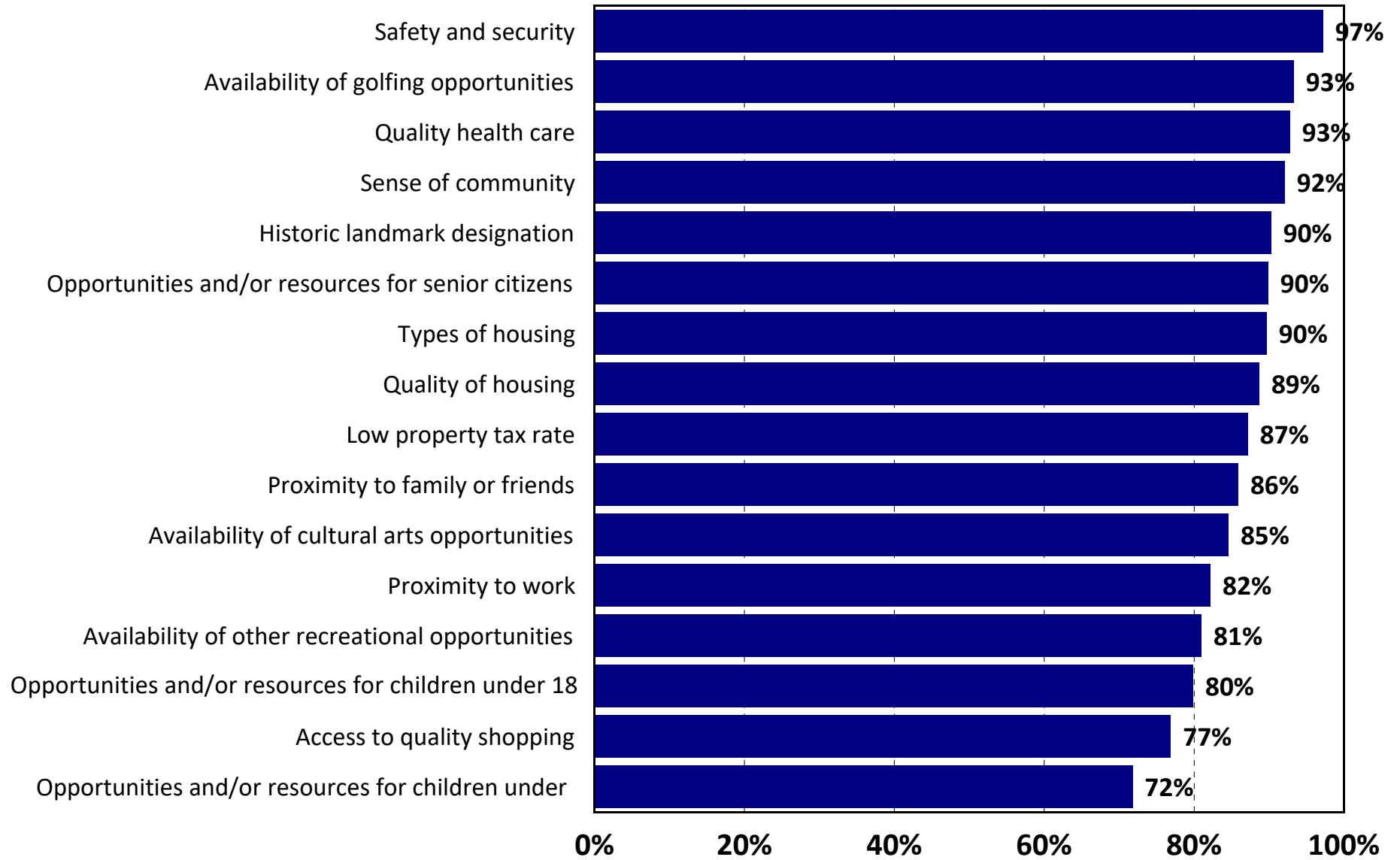
Q3a. Level of Importance of Various Reasons for Choosing to Live in Pinehurst

by percentage of respondents who rated the item as a 1 to 4 on a 4-point scale

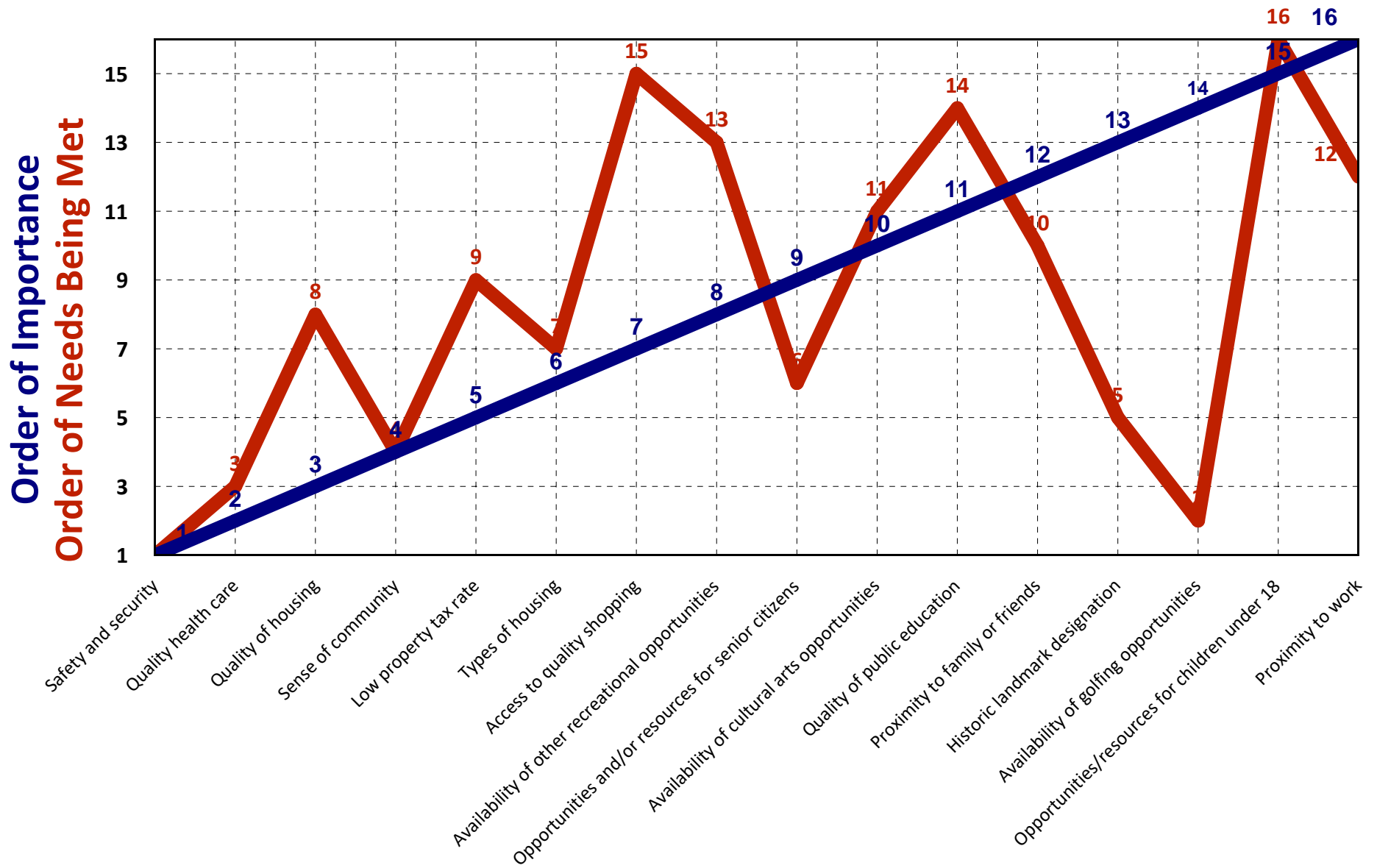


Q3b. Are your needs being met in Pinehurst?

by percentage of respondents who answered “yes”



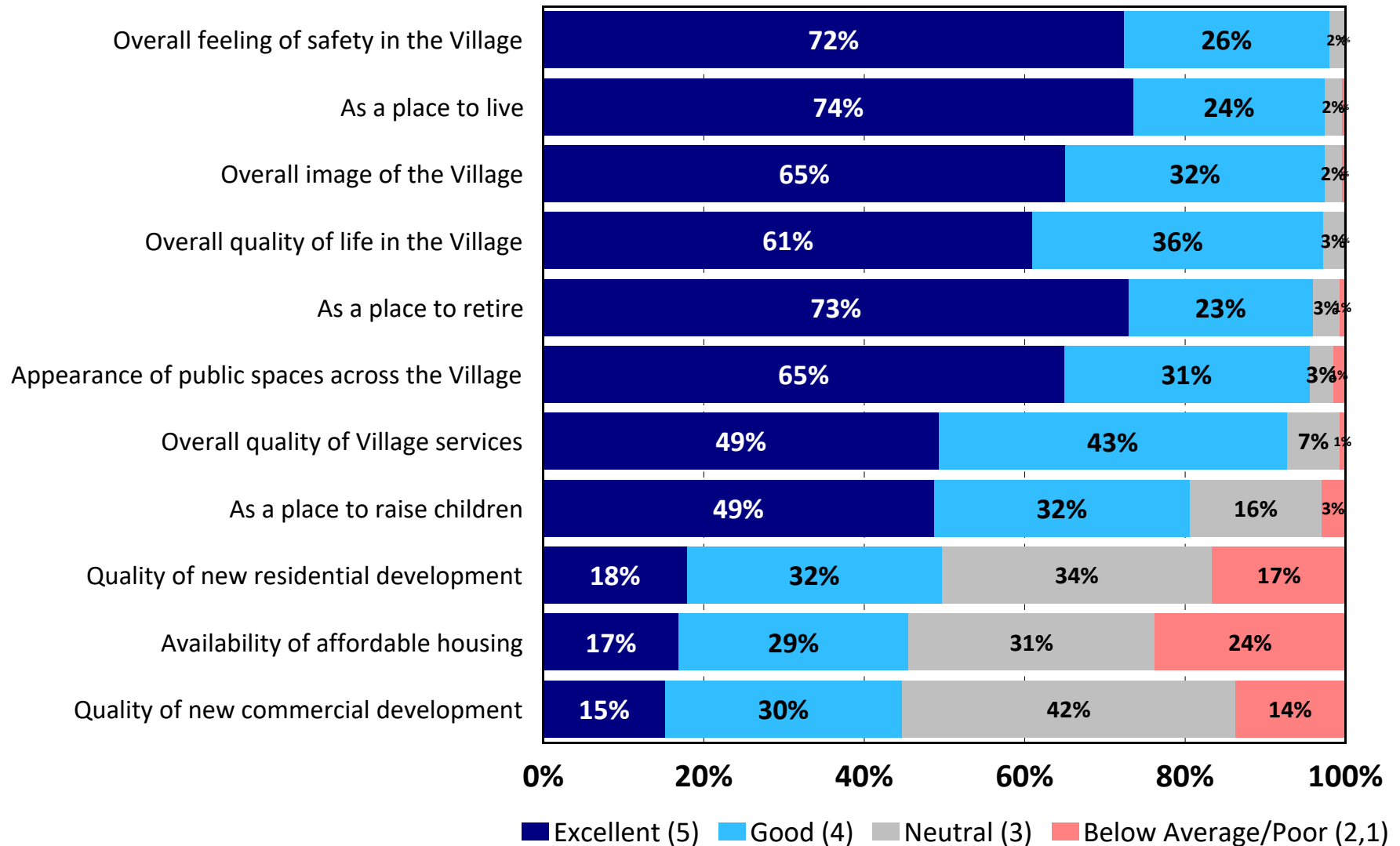
The Importance of Various Reasons for Choosing to Live in Pinehurst vs. Needs Being Met in Pinehurst



Red points above the blue line are needs that are not being met relative to their importance

Q4. Perception Residents Have of Pinehurst as a Community

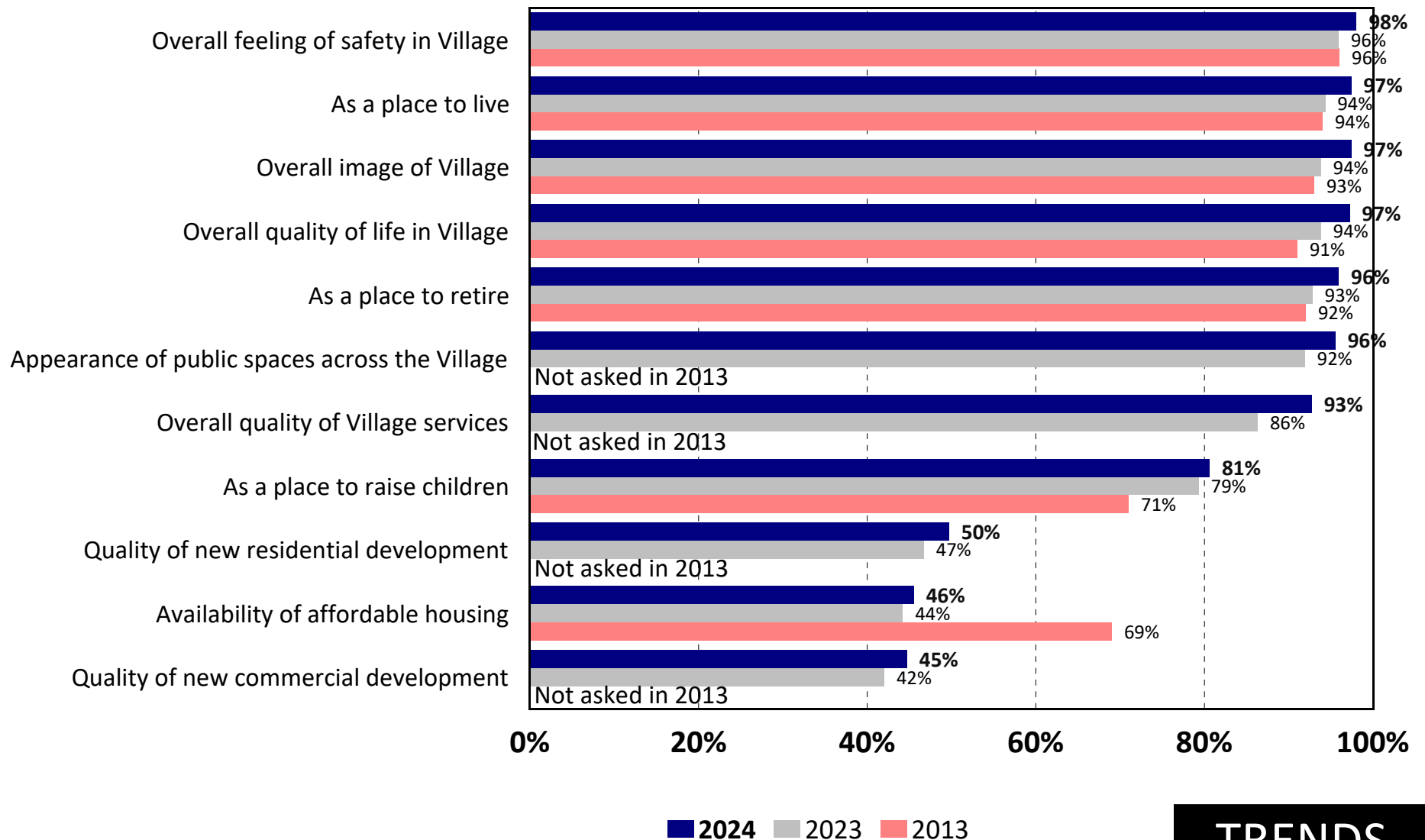
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding “no opinion”)



Q4. Perception Residents Have of Pinehurst as a Community

2024, 2023 & 2013

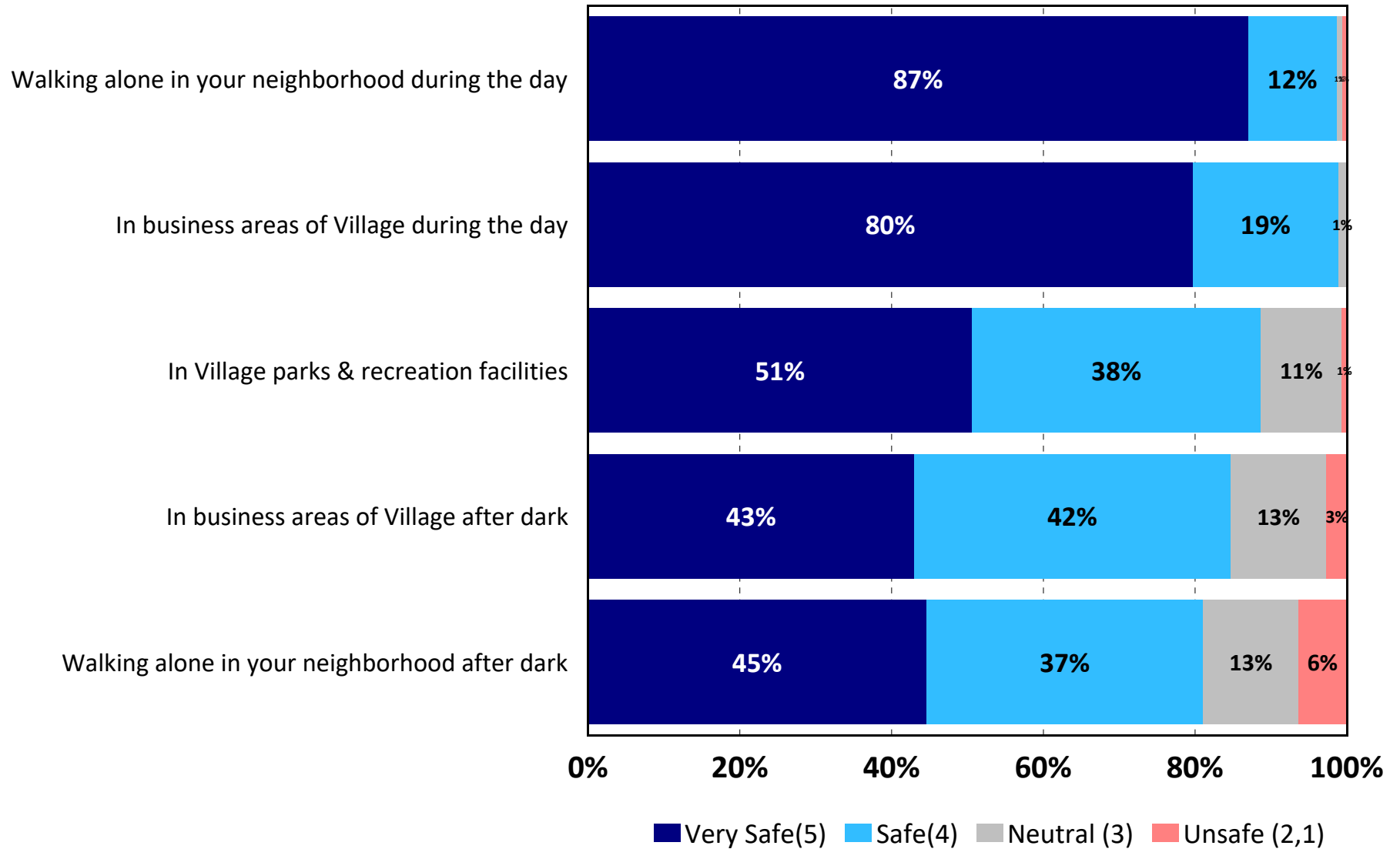
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding “no opinion”)



TRENDS

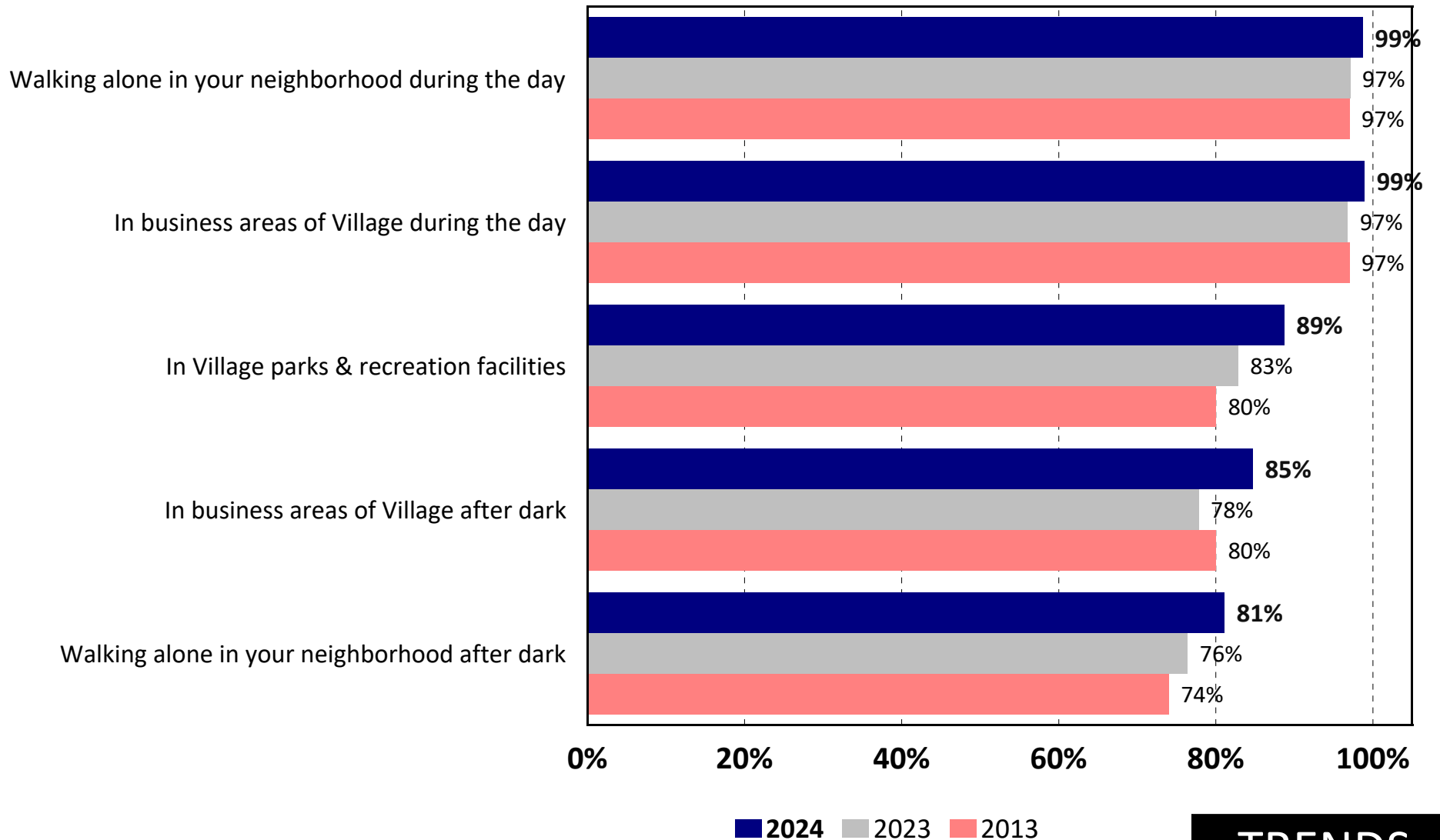
Q5. Perceptions of Safety and Security in Pinehurst

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



Q5. Perceptions of Safety and Security in Pinehurst 2024, 2023 & 2013

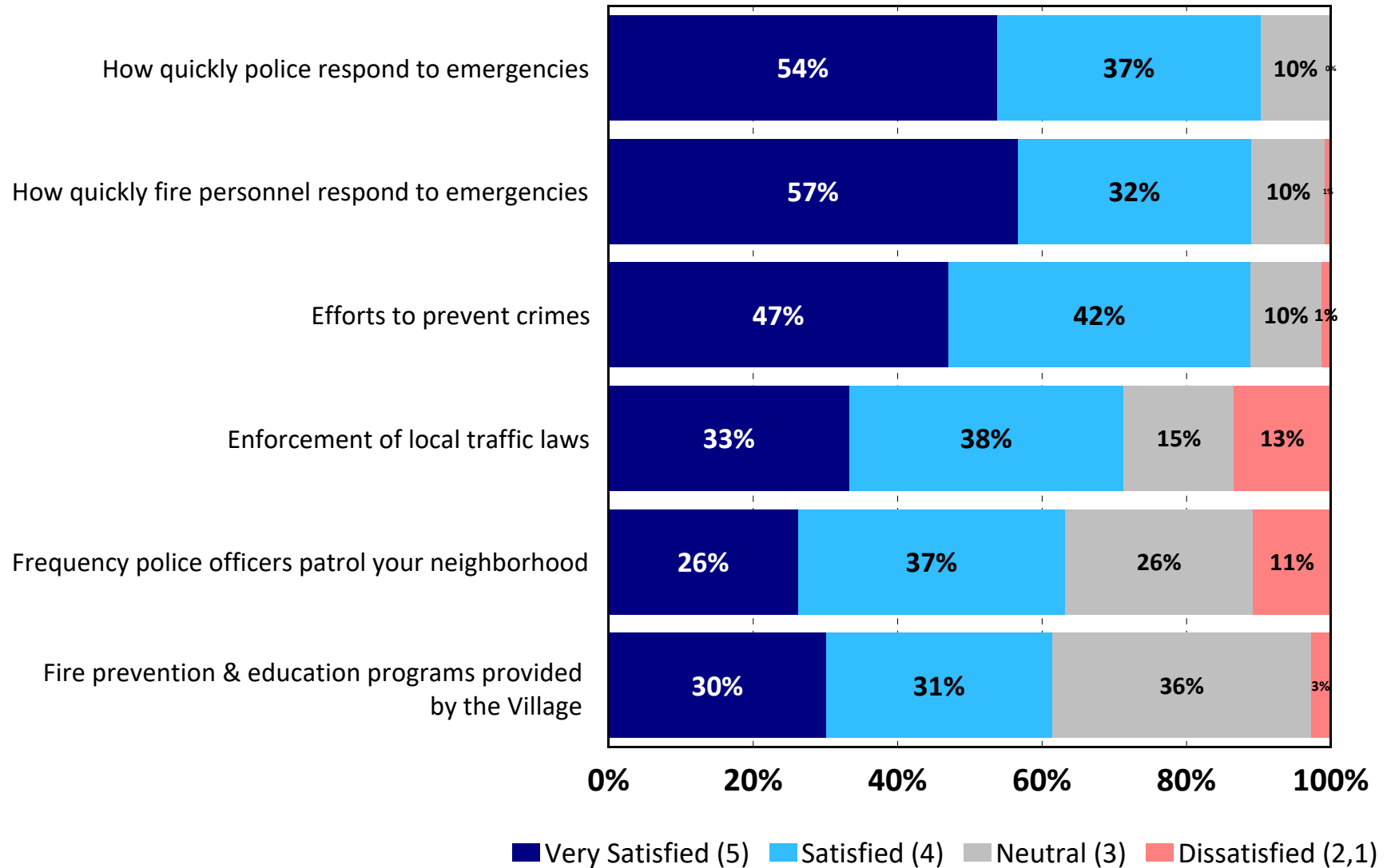
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding “no opinion”)



TRENDS

Q6. Satisfaction with Public Safety

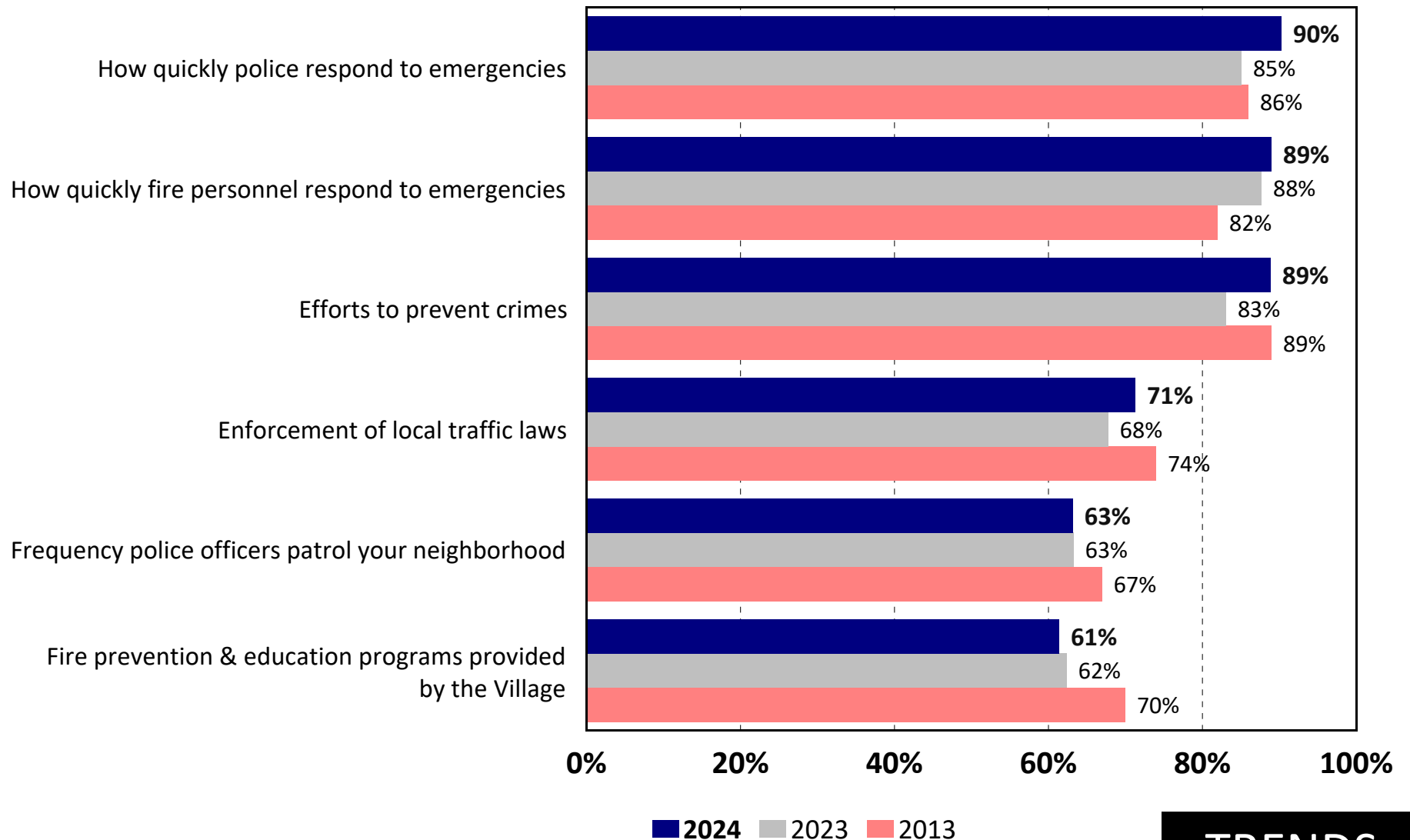
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding “no opinion”)



Q6. Satisfaction with Public Safety

2024, 2023 & 2013

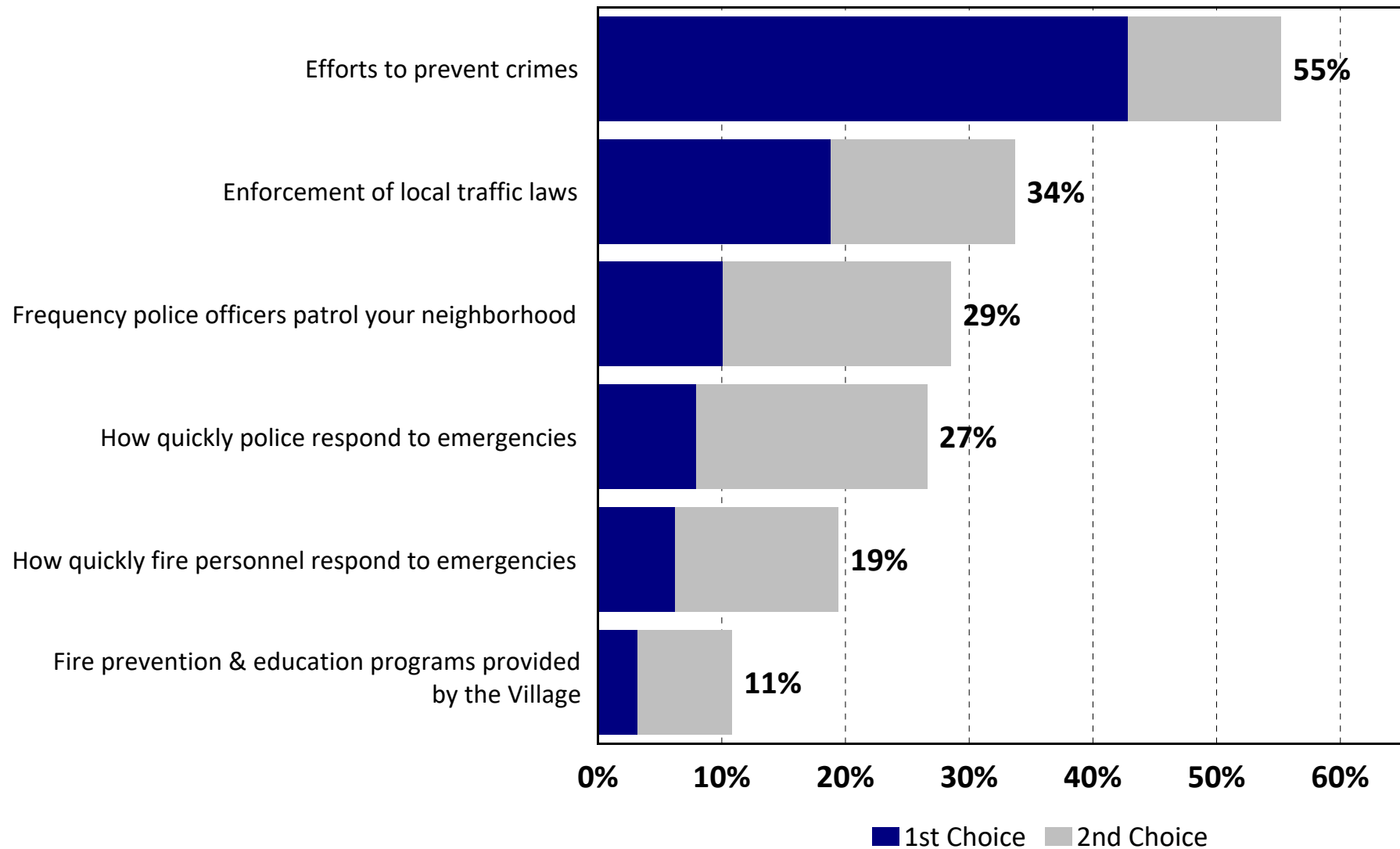
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding “no opinion”)



TRENDS

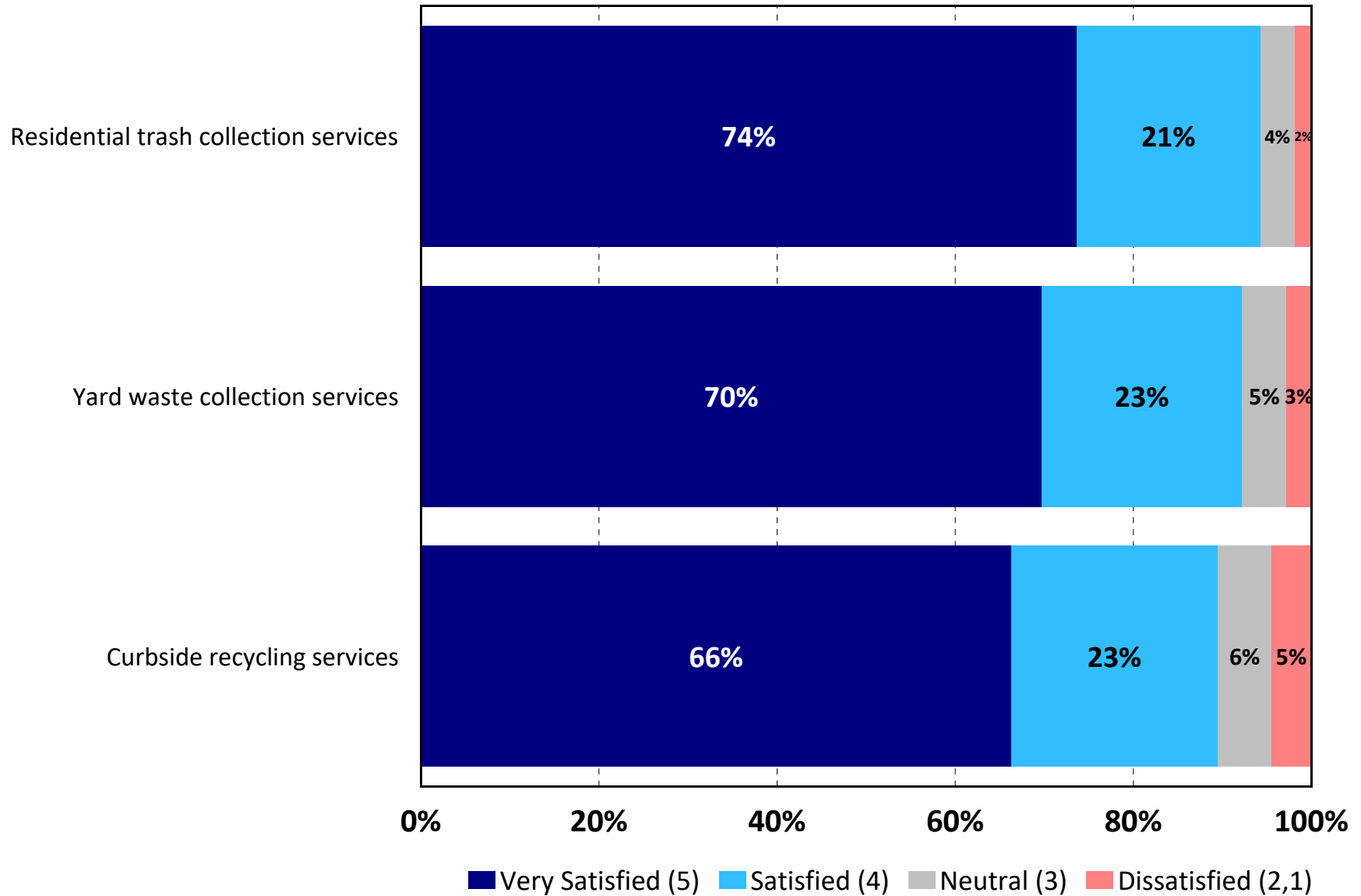
Q7. Public Safety Services That Should Receive the Most Emphasis Over the Next TWO Years

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



Q8. Satisfaction with Solid Waste Services

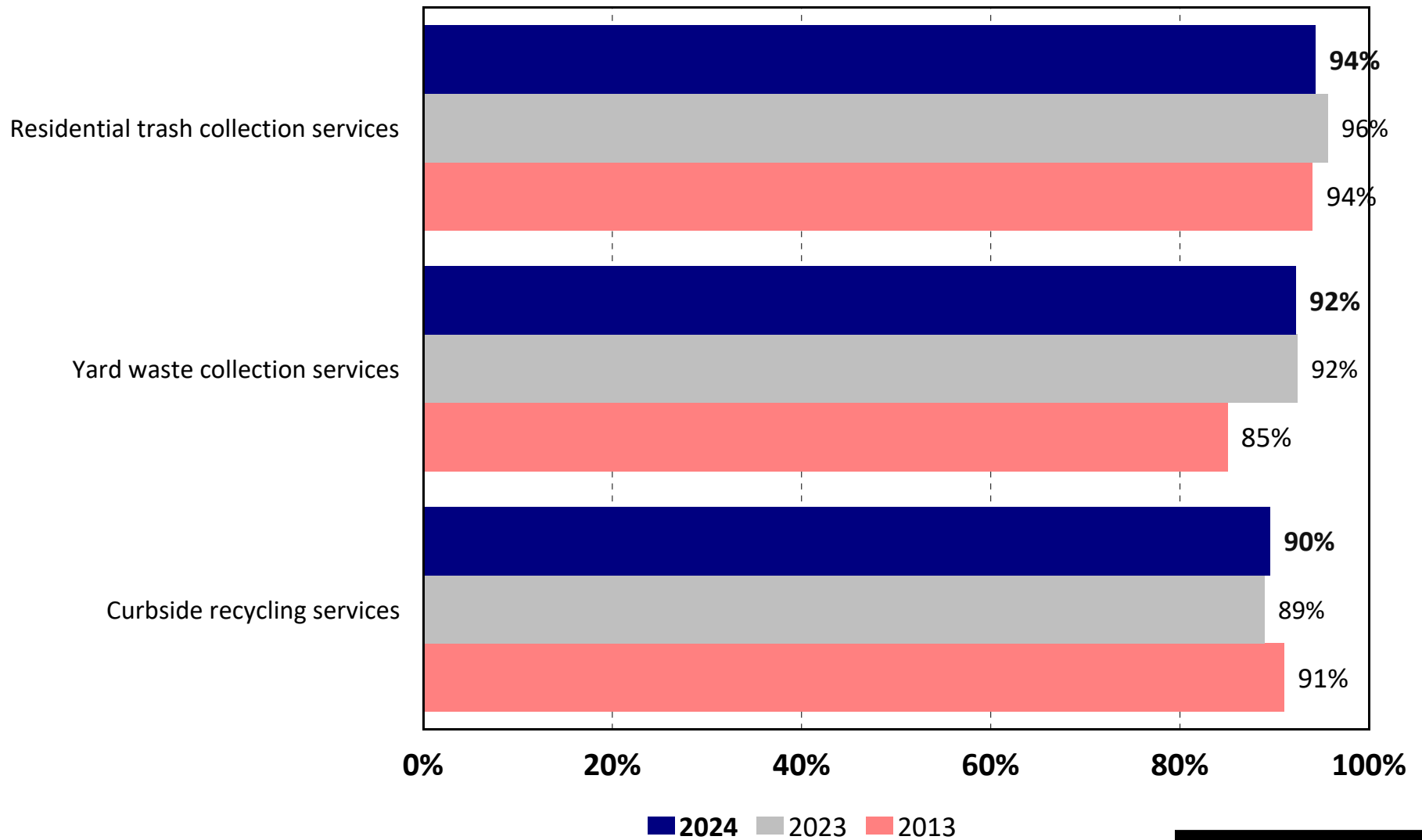
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding "no opinion")



Q8. Satisfaction with Solid Waste Services

2024, 2023 & 2013

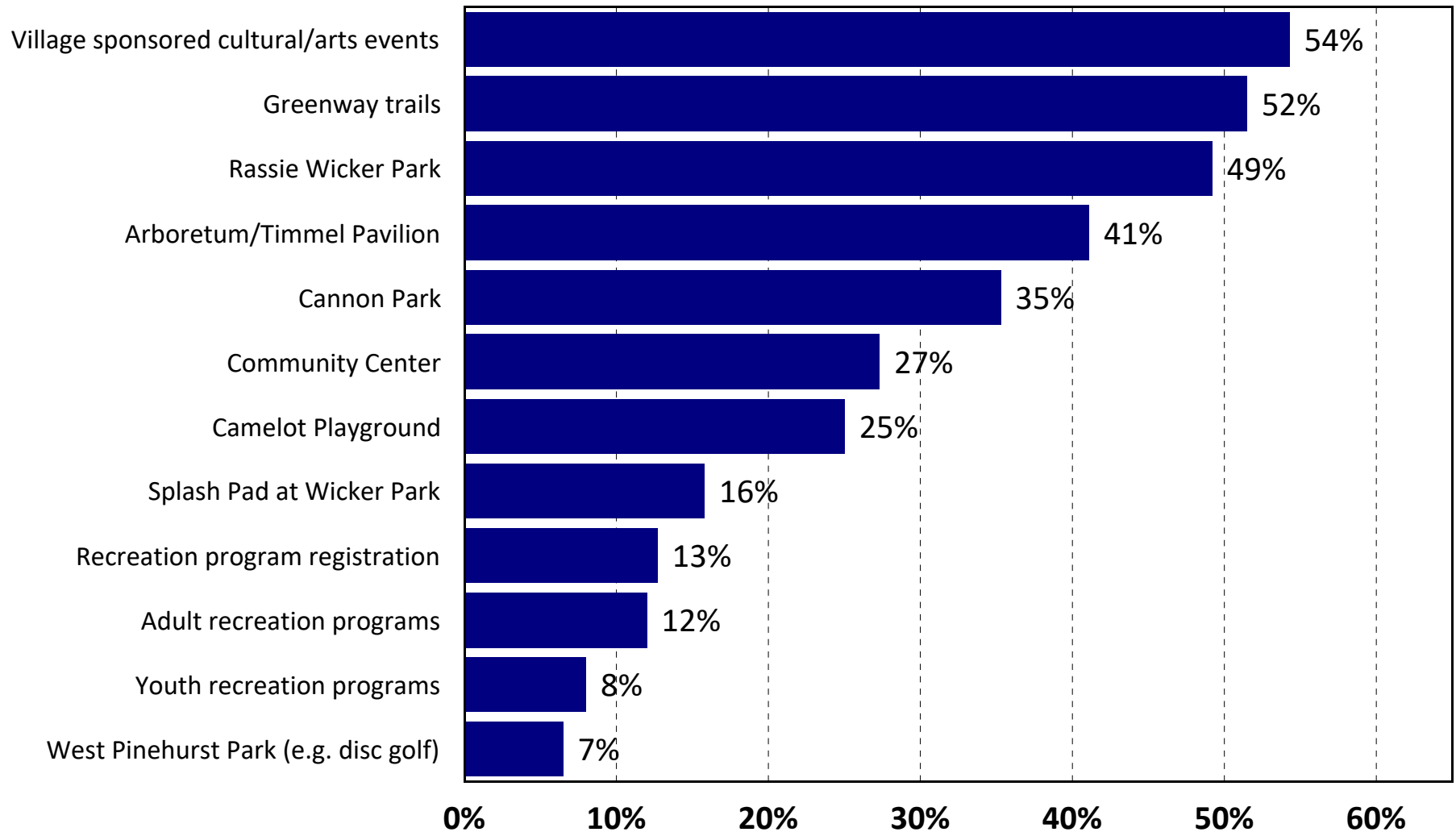
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding “no opinion”)



TRENDS

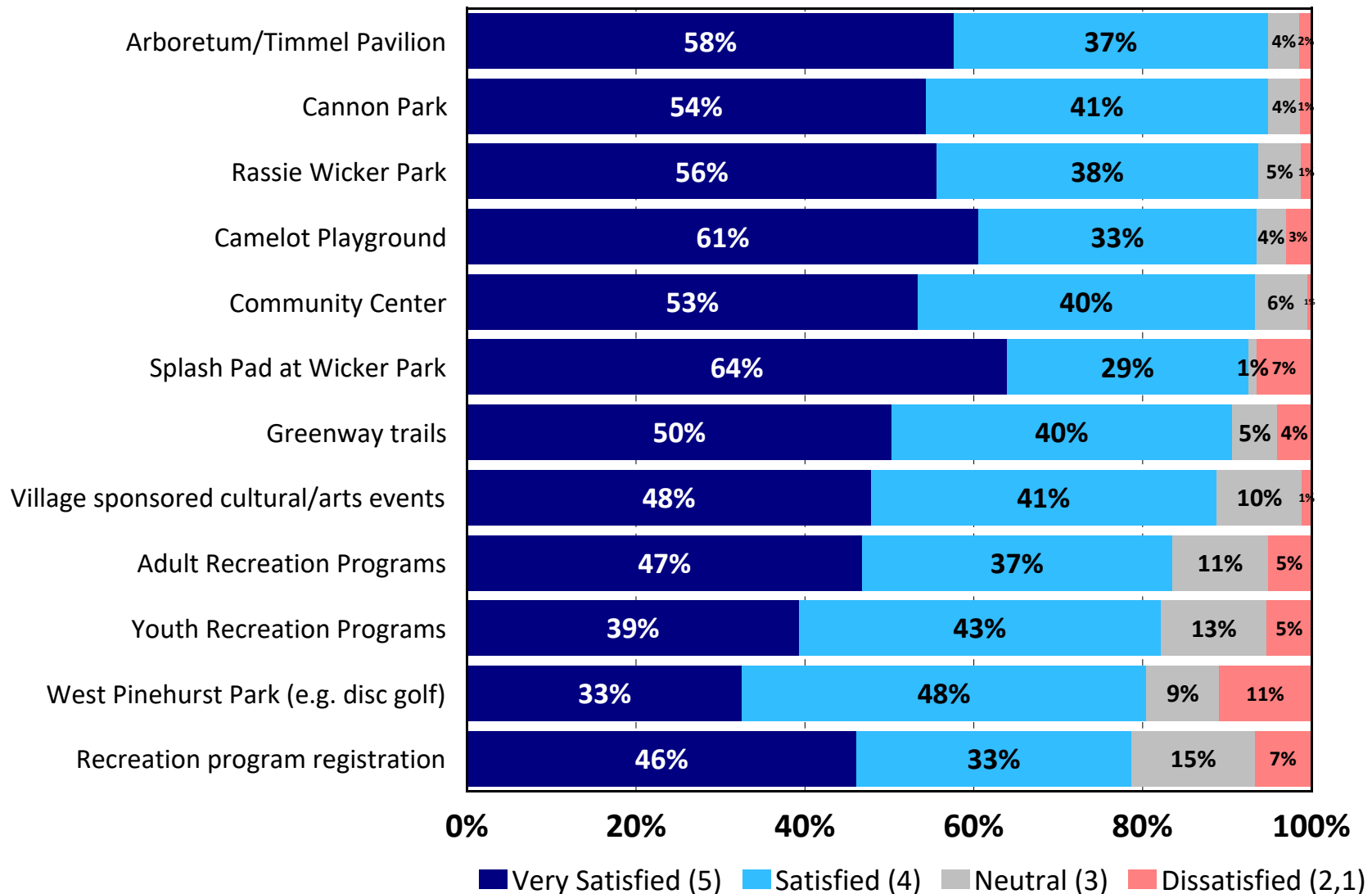
Q9[1]. Village of Pinehurst Parks and Recreation Programs and Facilities Residents Have Used During the Past Year

by percentage of respondents (multiple selections could be made)



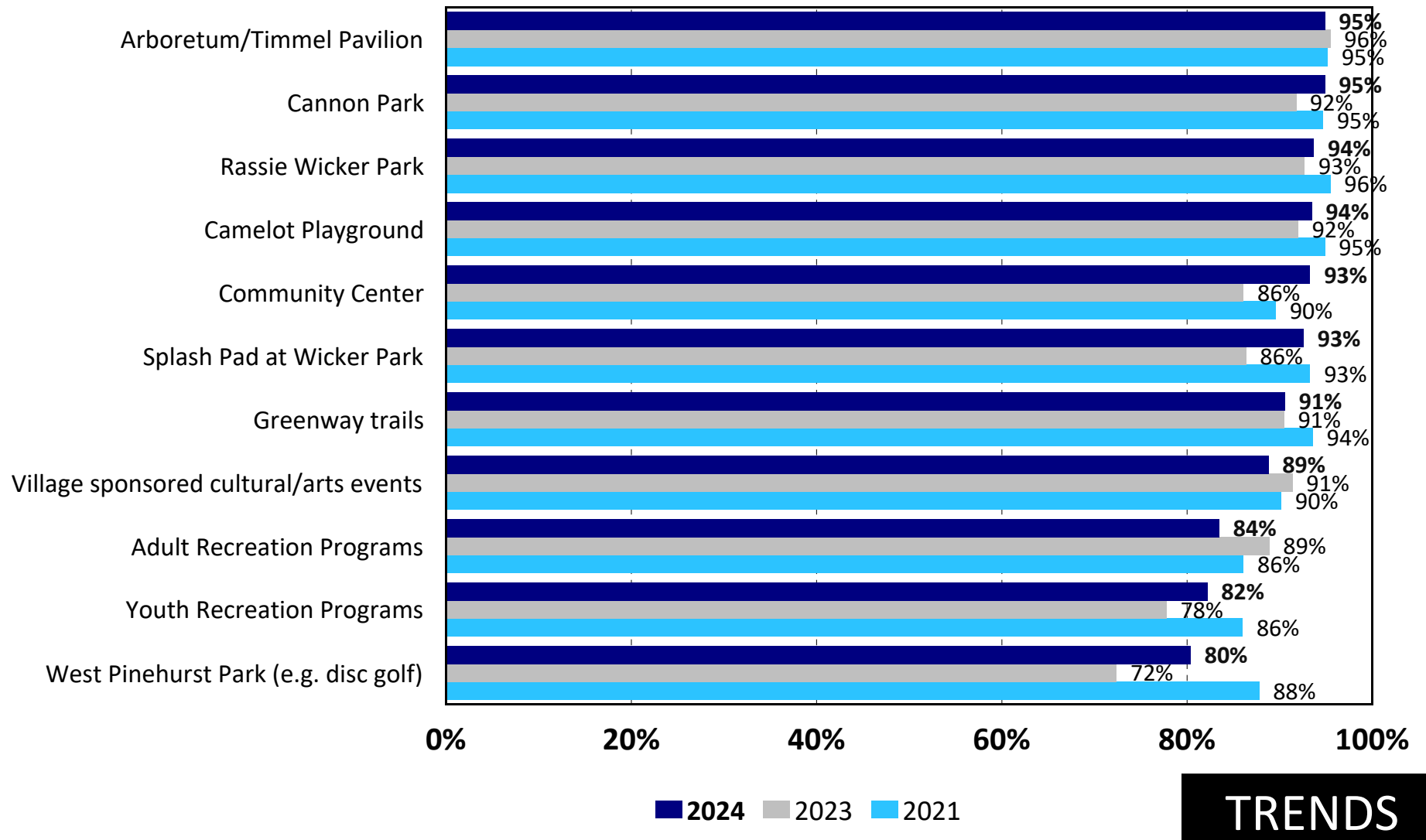
Q9[2]. Satisfaction with Village of Pinehurst Parks and Recreation Programs and Facilities

by percentage of respondents who used programs and facilities during the past year and rated the item as a 1 to 5 on a 5-point scale (excluding “no opinion”)



Q9[2]. Satisfaction with Village of Pinehurst Parks and Recreation Programs and Facilities 2024, 2023 & 2021

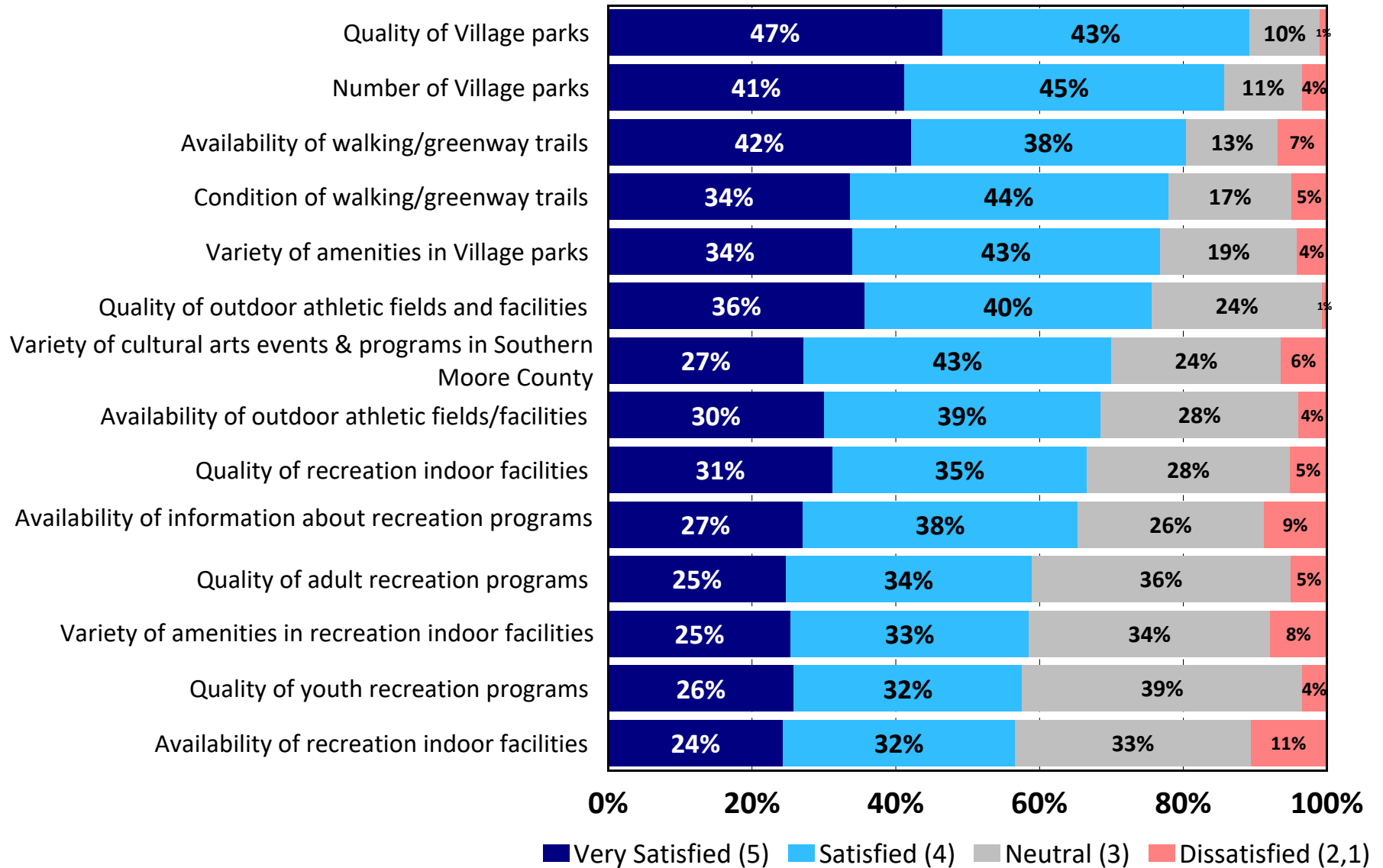
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding “no opinion”)



TRENDS

Q10. Satisfaction with Cultural and Recreation Services

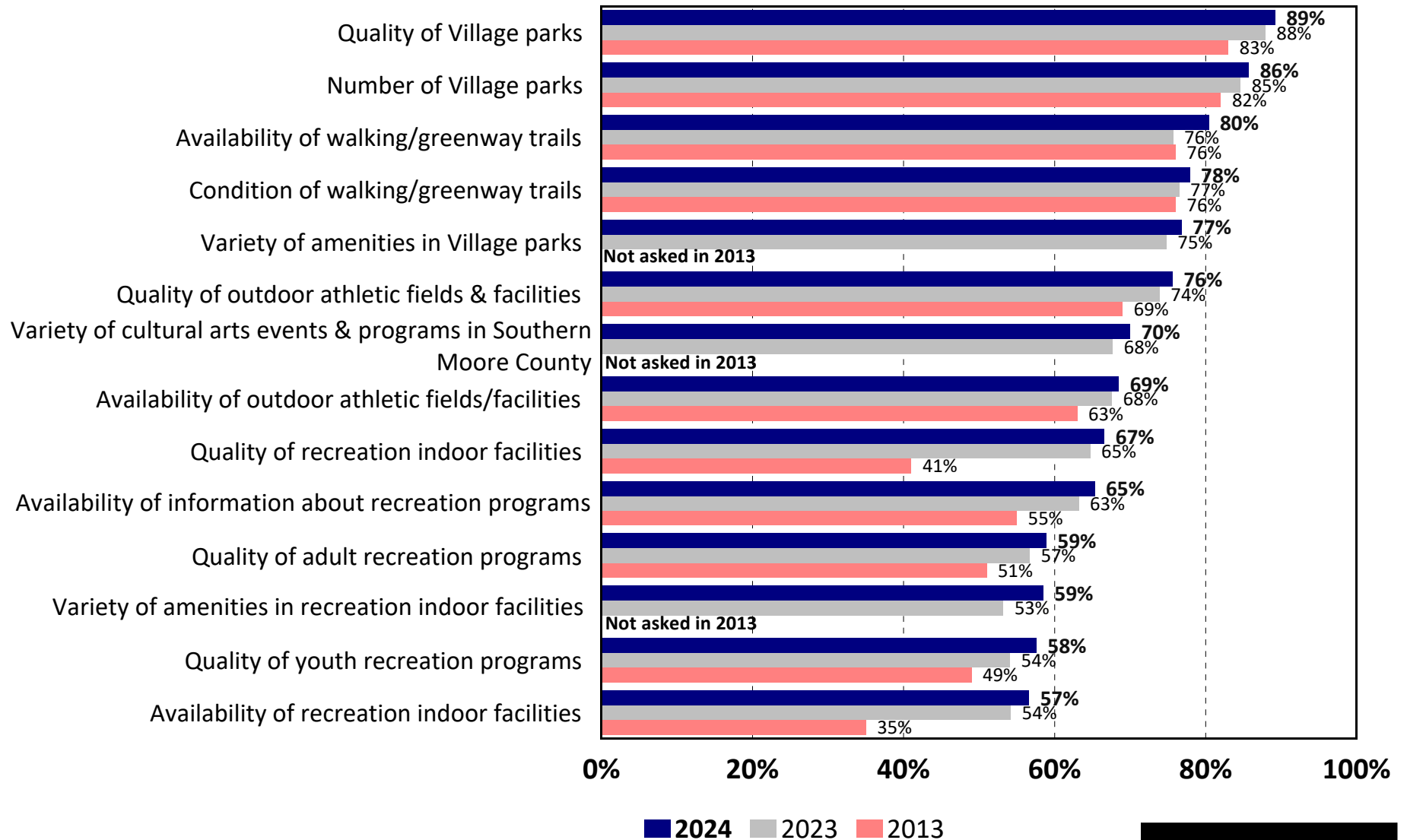
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding “no opinion”)



Q10. Satisfaction with Cultural and Recreation Services

2024, 2023 & 2013

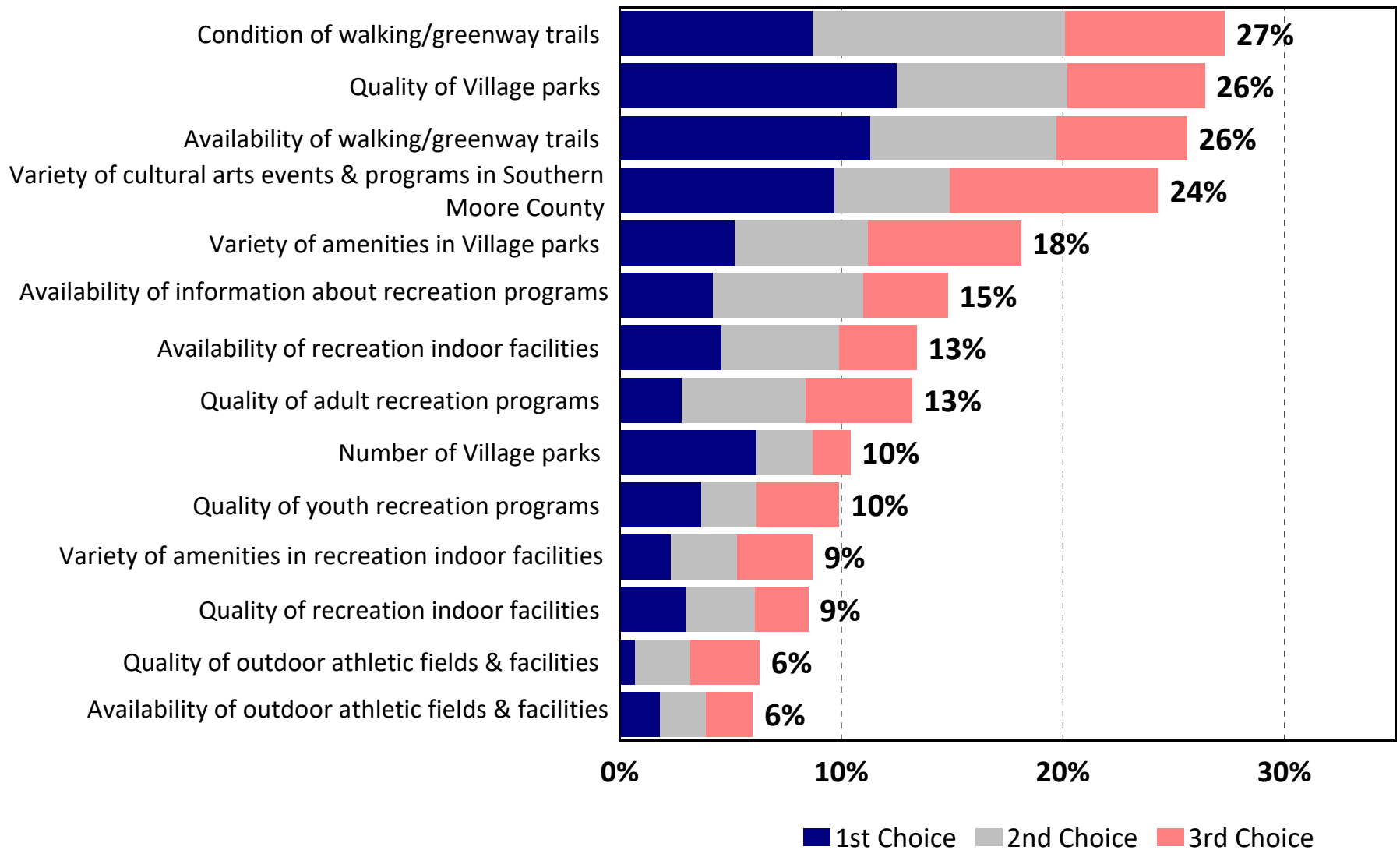
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding “no opinion”)



TRENDS

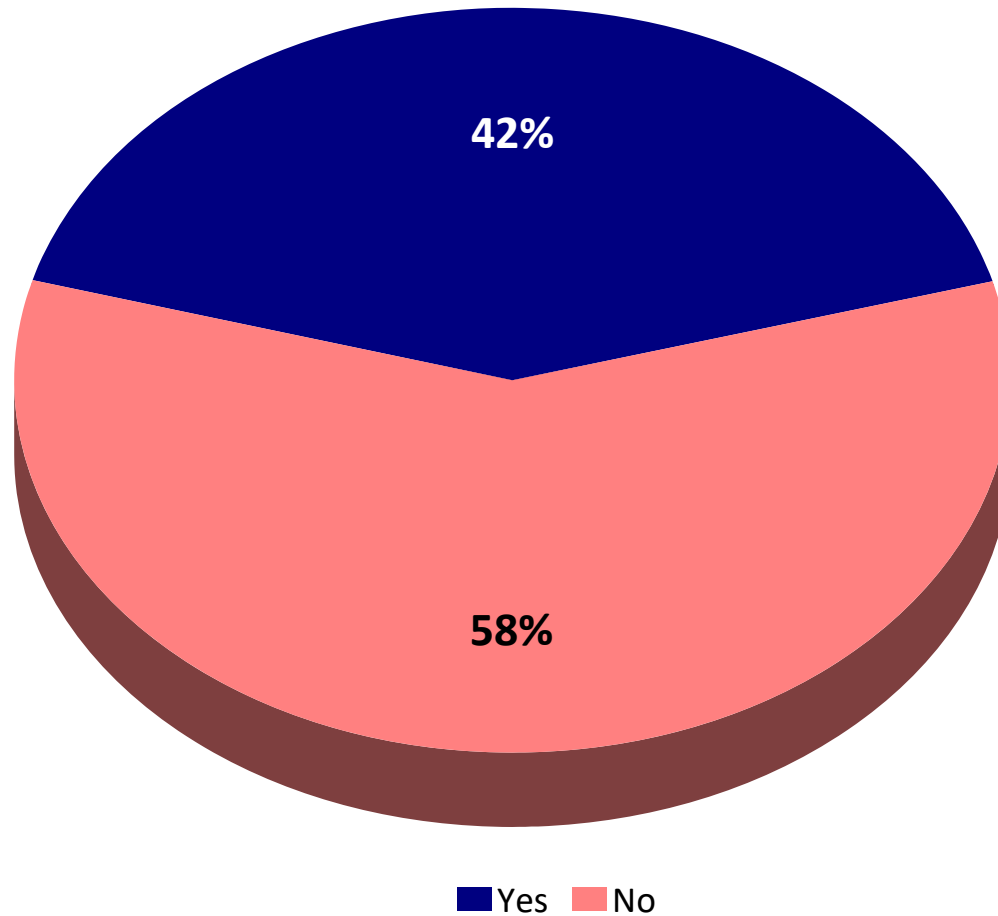
Q11. Cultural and Recreation Services That Should Receive the Most Emphasis Over the Next TWO Years

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



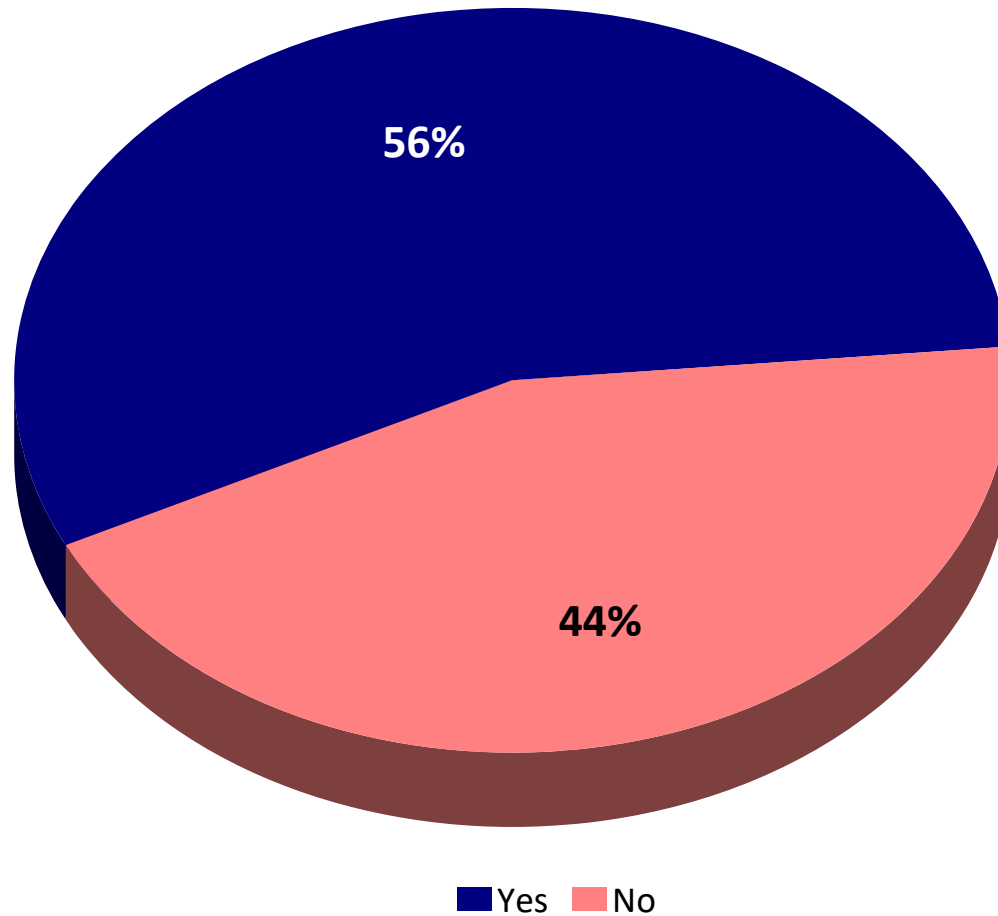
Q12. Do you shop regularly in the Village Center (downtown)?

by percentage of respondents (excluding "not provided")



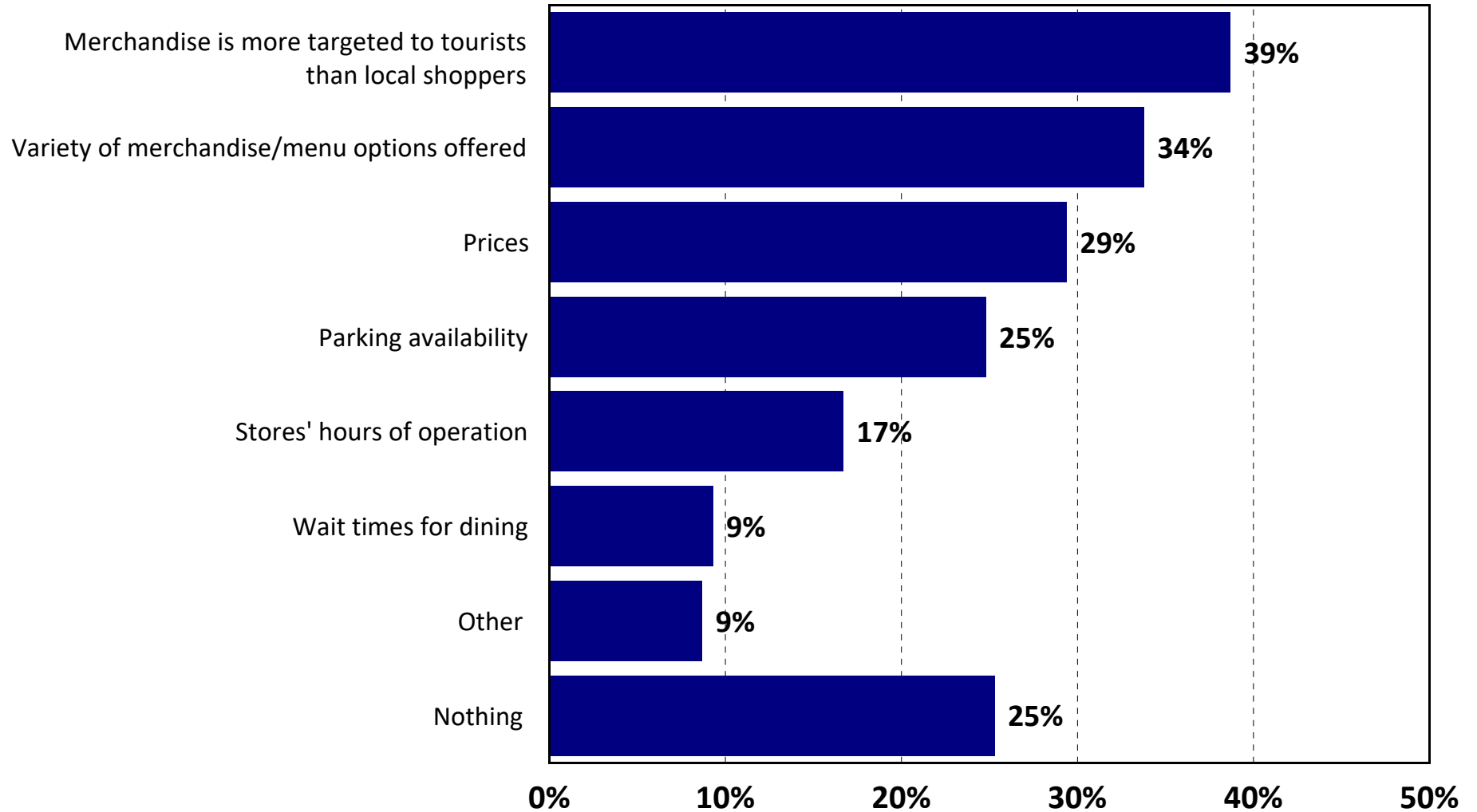
Q13. Do you regularly dine in the Village Center (downtown)?

by percentage of respondents (excluding “not provided”)



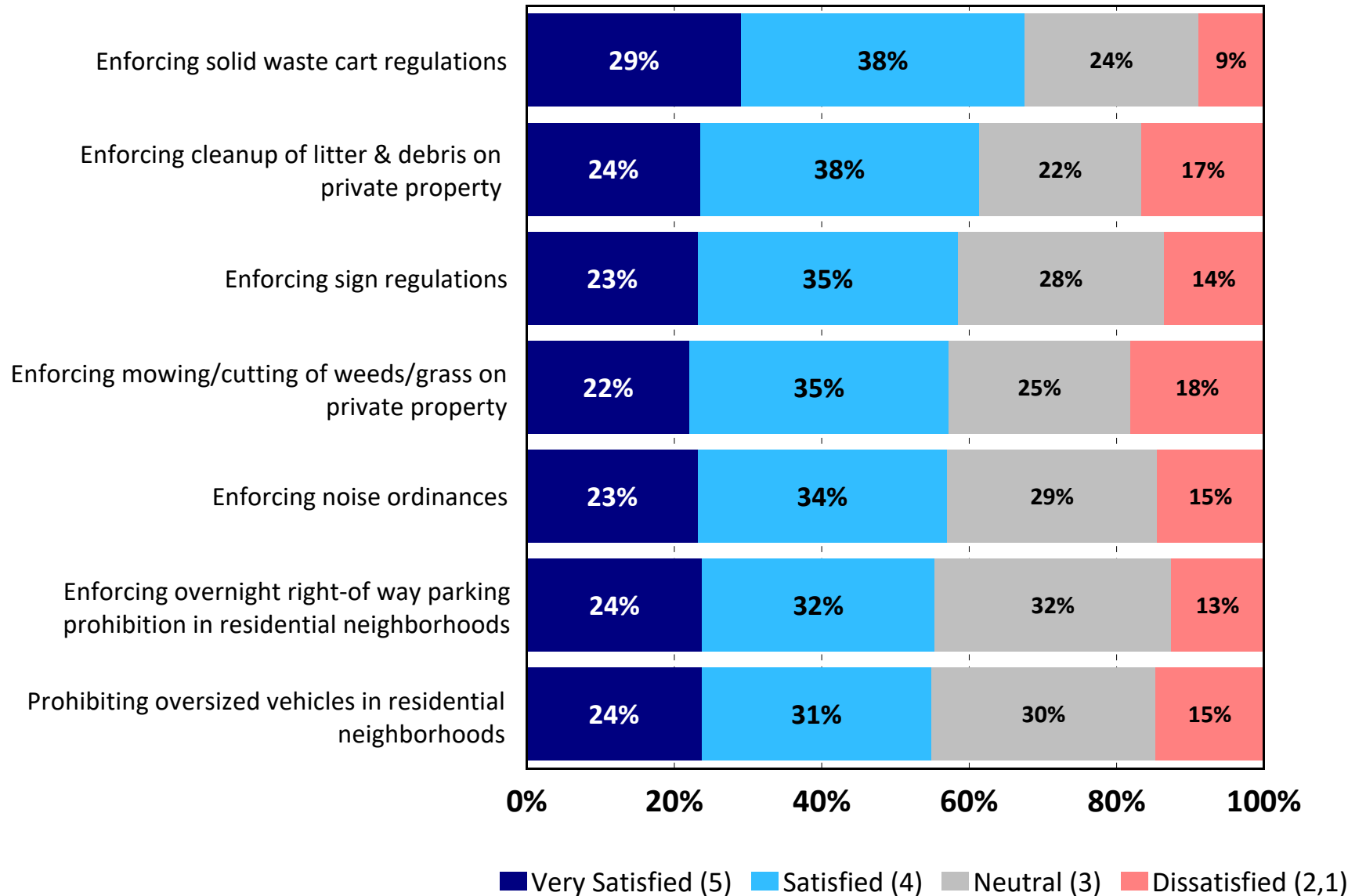
Q14. Reasons That Prevent Respondents From Shopping/ Regularly Dining in the Village Center (Downtown) More Often

by percentage of respondents (multiple selections could be made)



Q15. Satisfaction with Code Enforcement

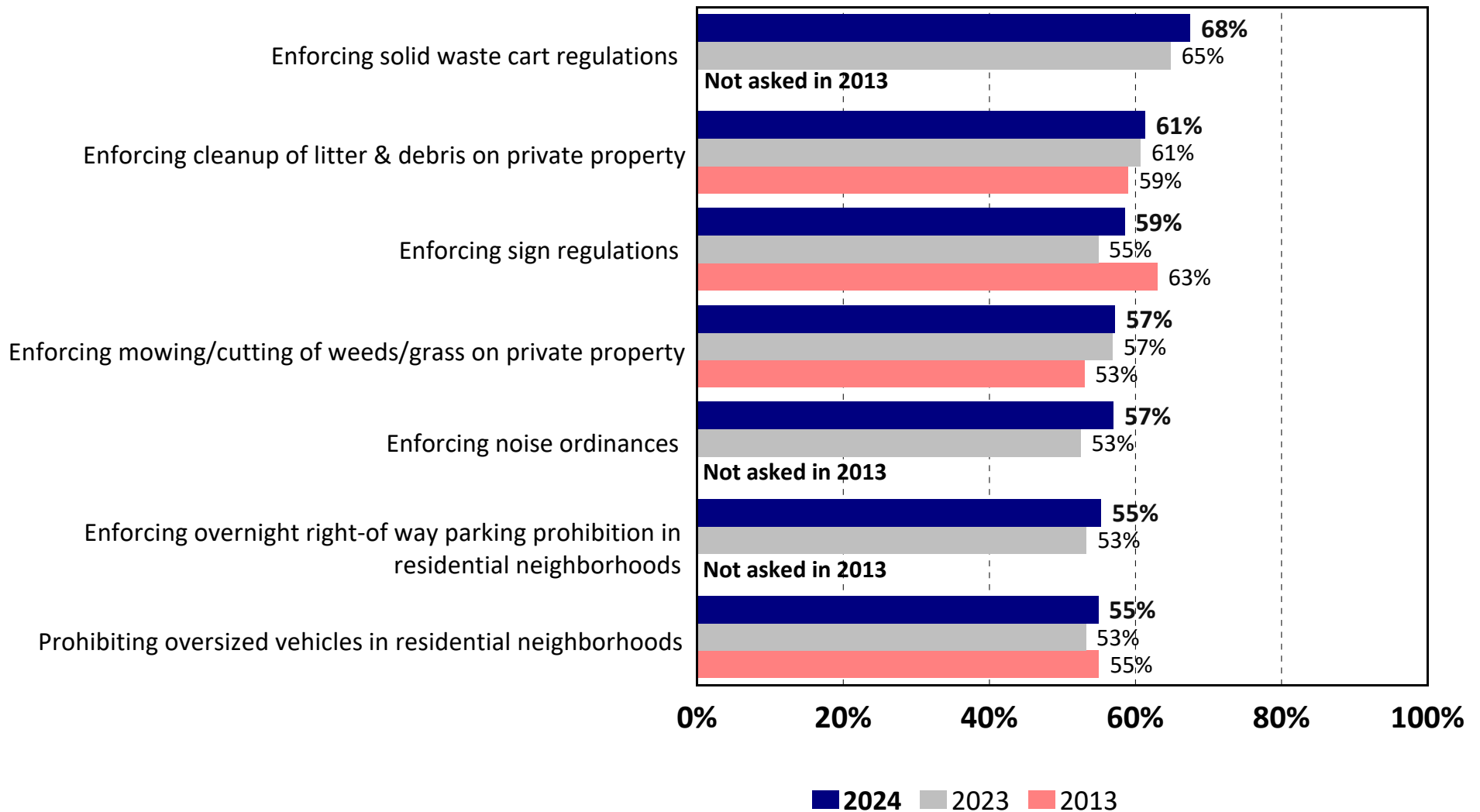
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding “no opinion”)



Q15. Satisfaction with Code Enforcement

2024, 2023 & 2013

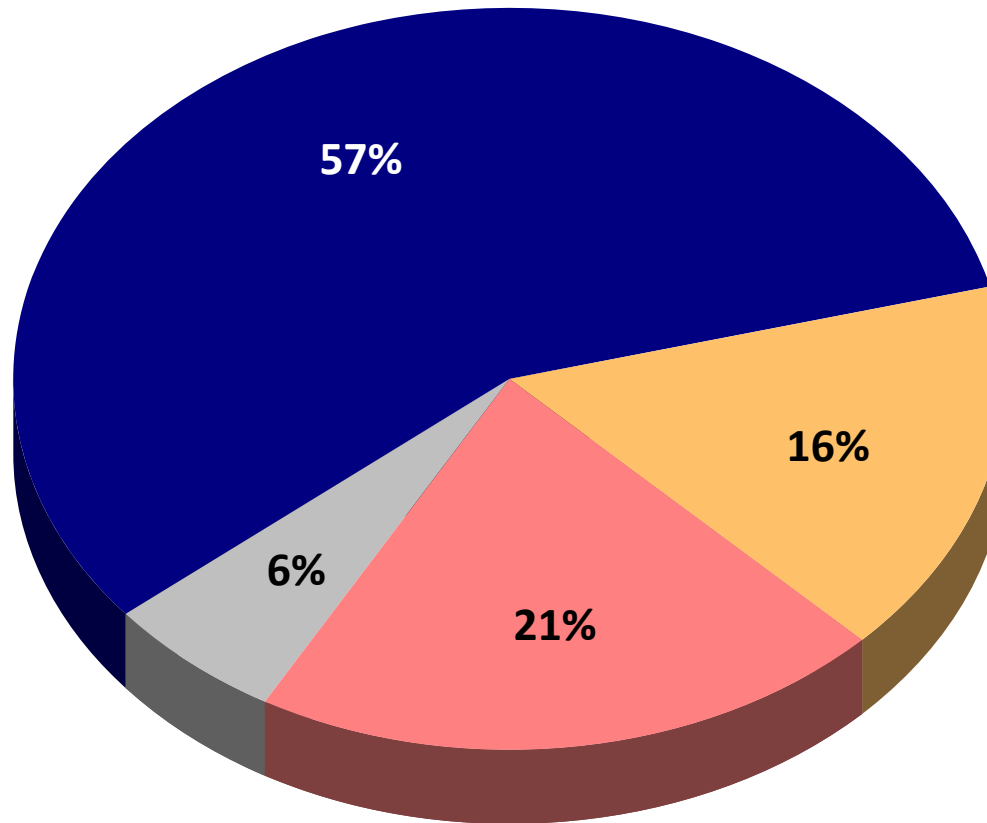
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding “no opinion”)



TRENDS

Q16. How would you describe the amount of effort the Village applies to enforce its codes and ordinances?

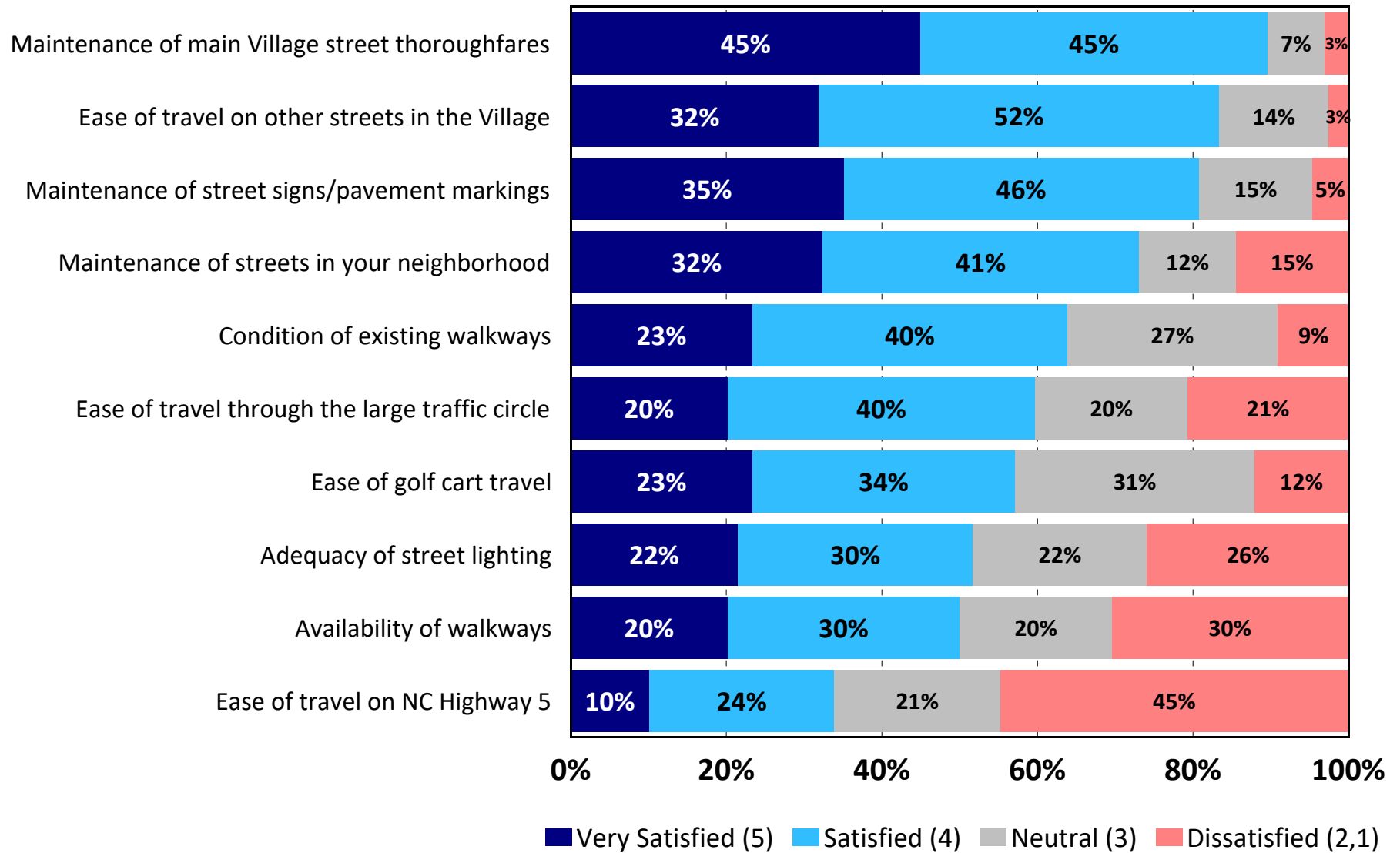
by percentage of respondents



■ About right ■ Too much ■ Too little ■ Not provided

Q17. Satisfaction with Transportation Services

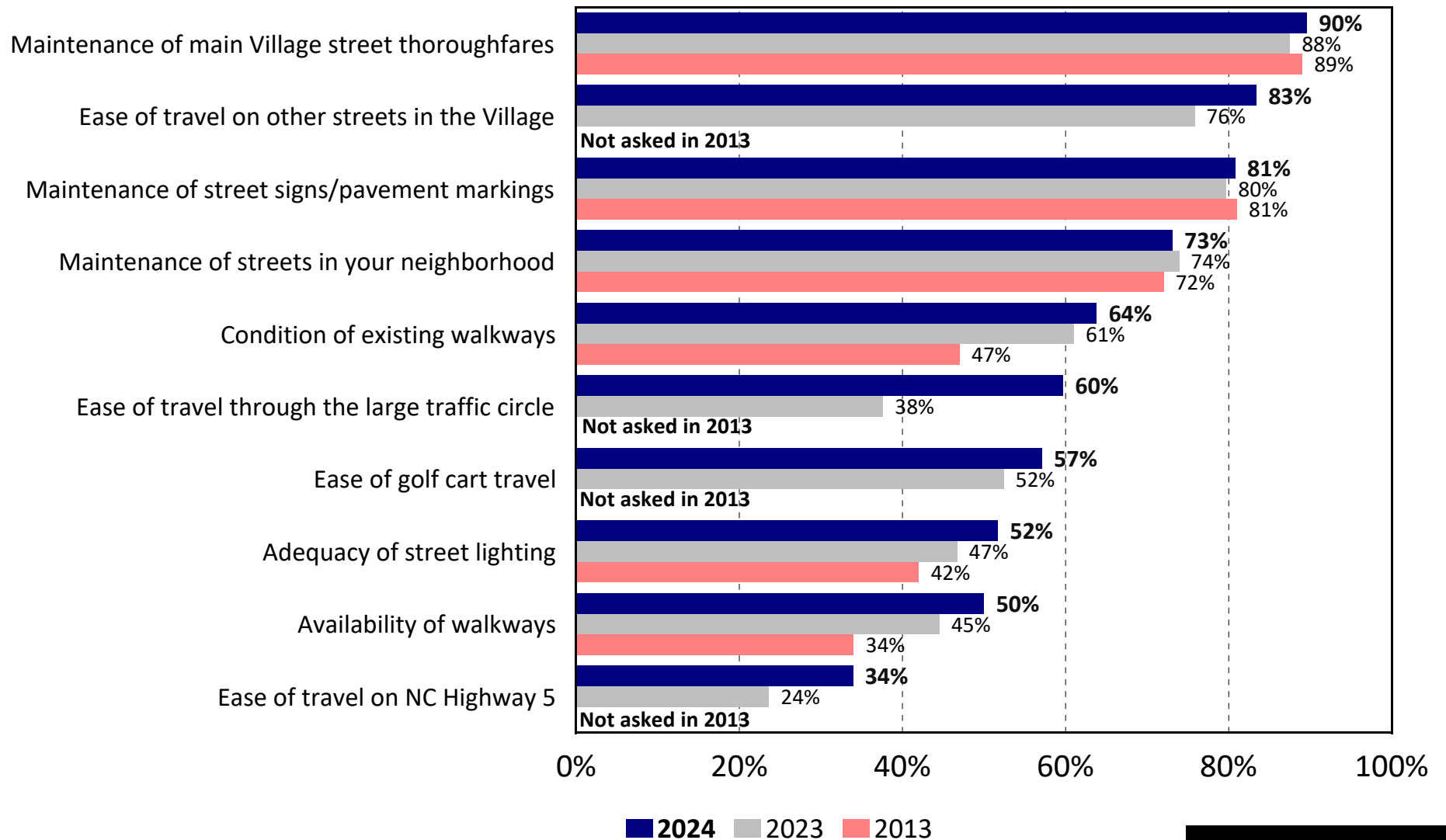
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding “no opinion”)



Q17. Satisfaction with Transportation Services

2024, 2023 & 2013

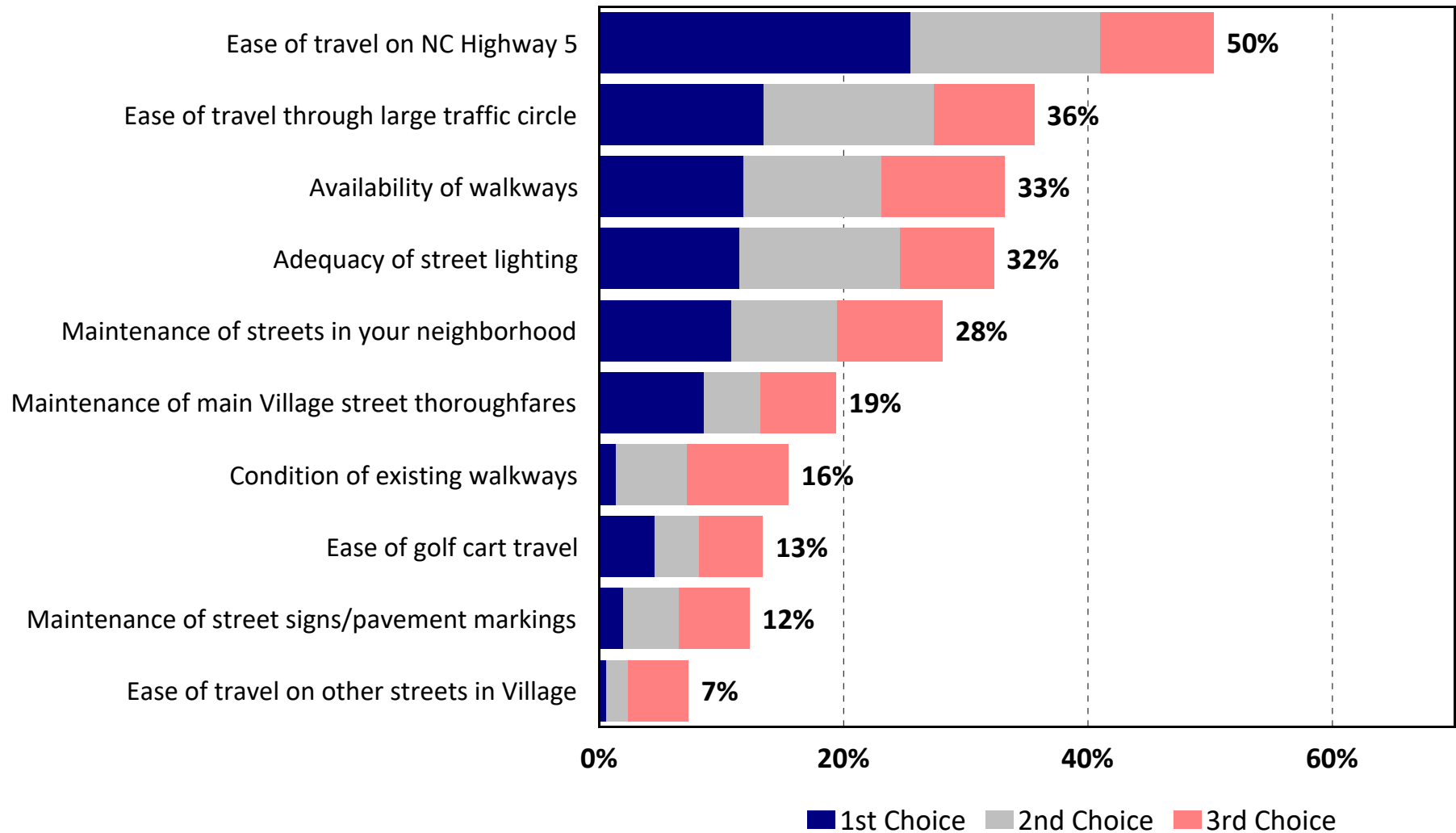
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding “no opinion”)



TRENDS

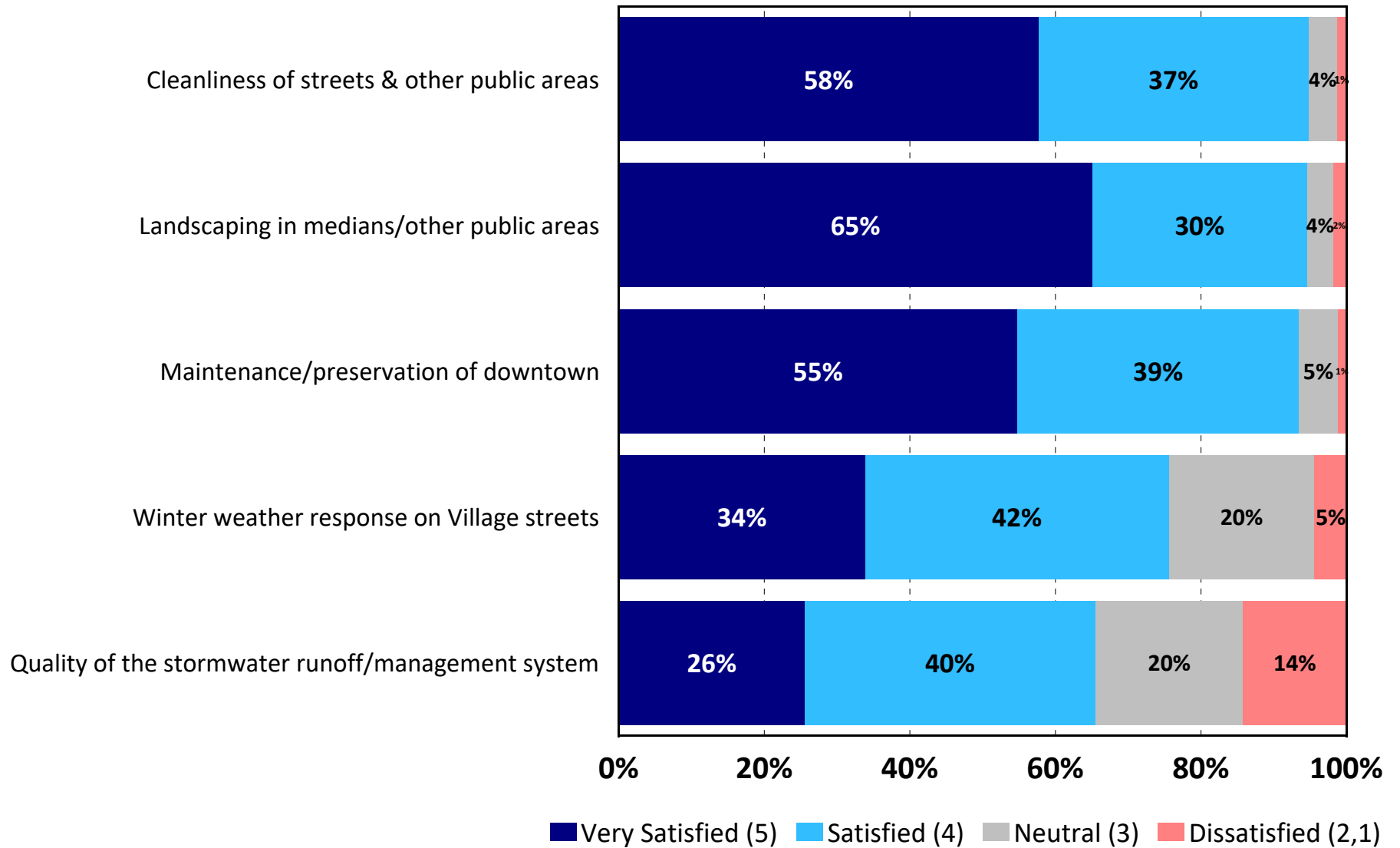
Q18. Transportation Services That Should Receive the Most Emphasis Over the Next TWO Years

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



Q19. Satisfaction with Public Services

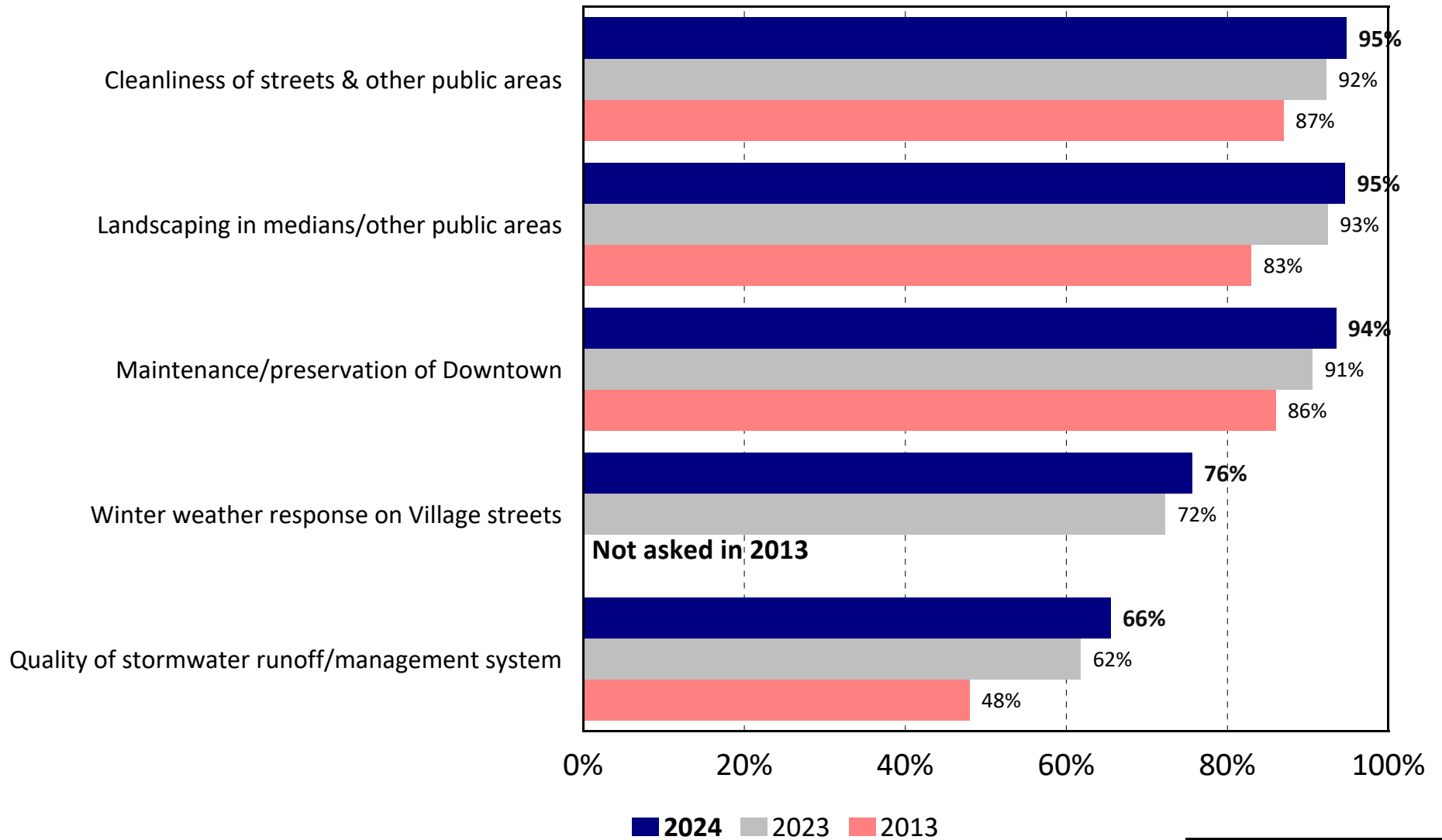
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding “no opinion”)



Q19. Satisfaction with Public Services

2024, 2023 & 2013

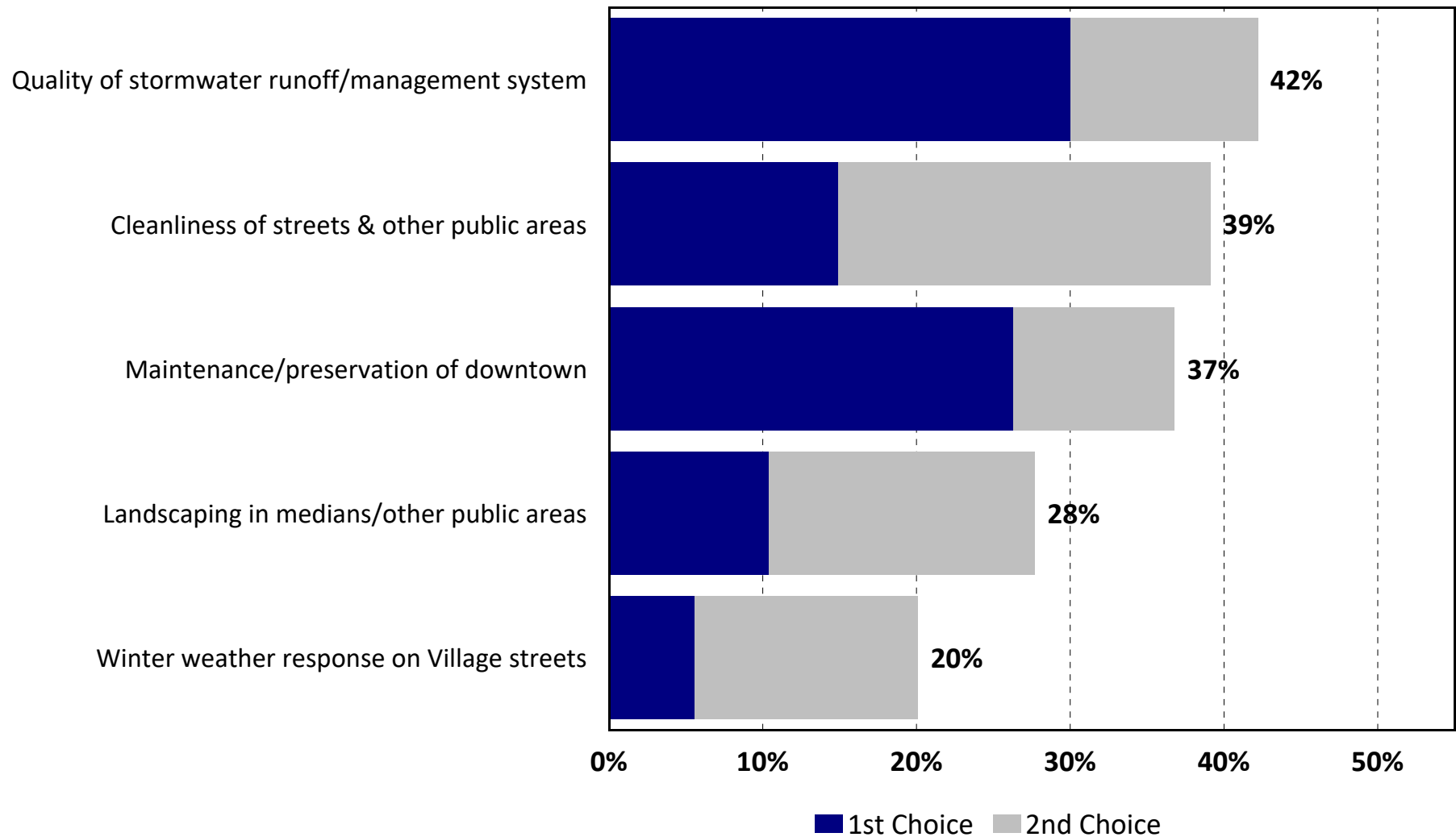
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding "no opinion")



TRENDS

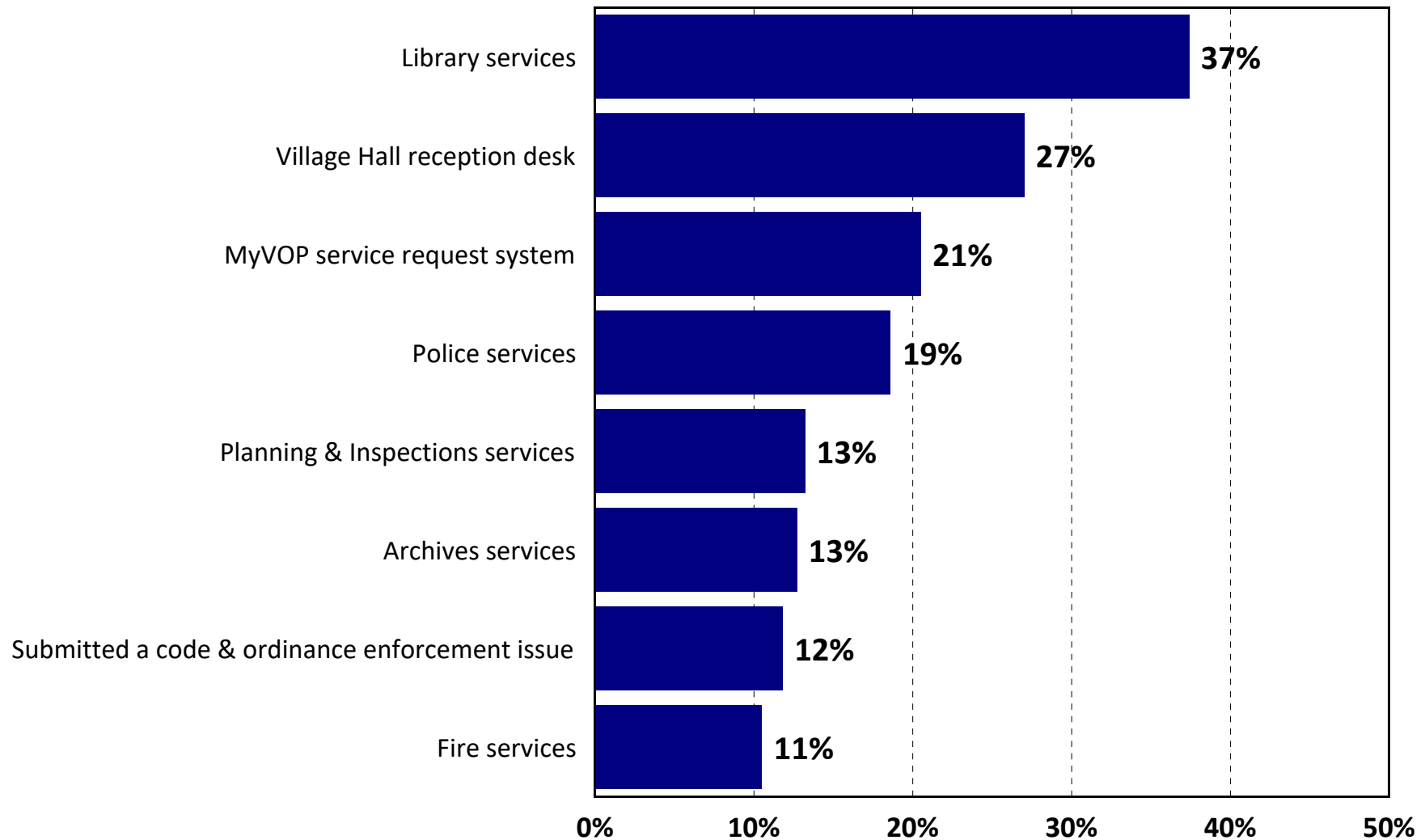
Q20. Public Services That Should Receive the Most Emphasis Over the Next TWO Years

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



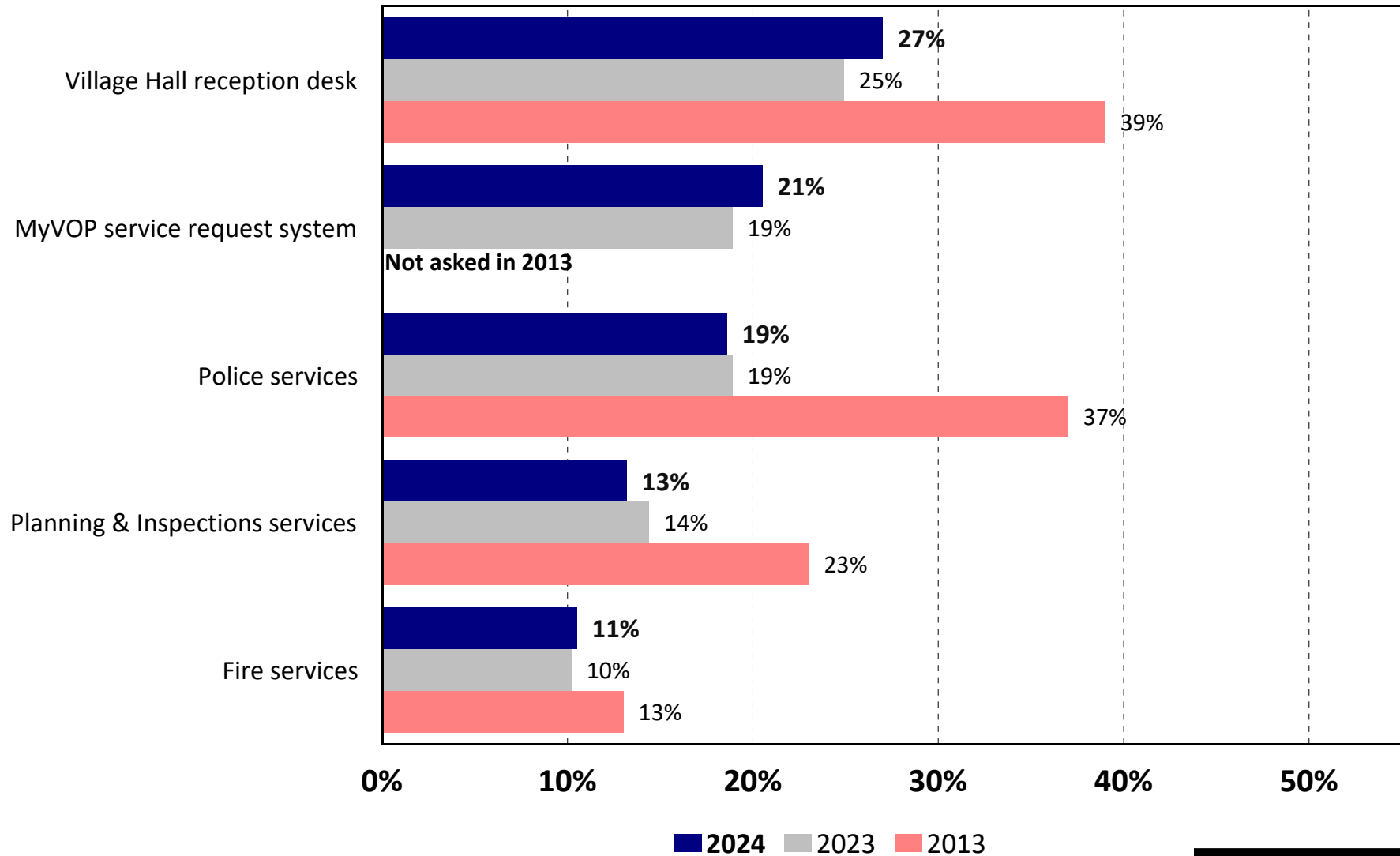
Q21[1]. Have you or other members of your household used these Village services and facilities during the past year?

by percentage of respondents who answered "yes"



Q22[1]. Households That Have Used Village Services and Facilities - 2024, 2023 & 2013

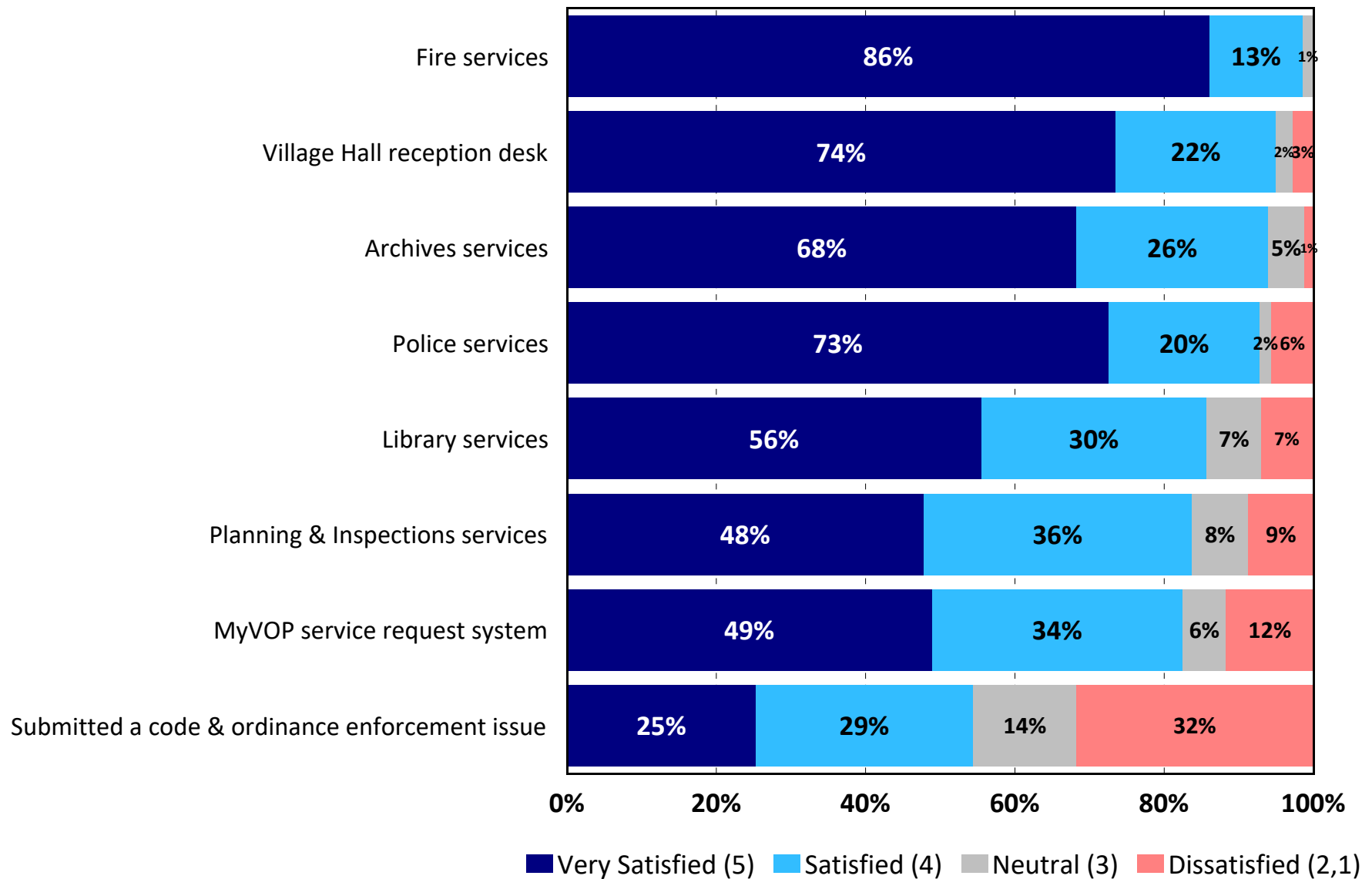
by percentage of respondents who answered "yes"



TRENDS

Q21[2]. Satisfaction with Village Services and Facilities That Households Have Used

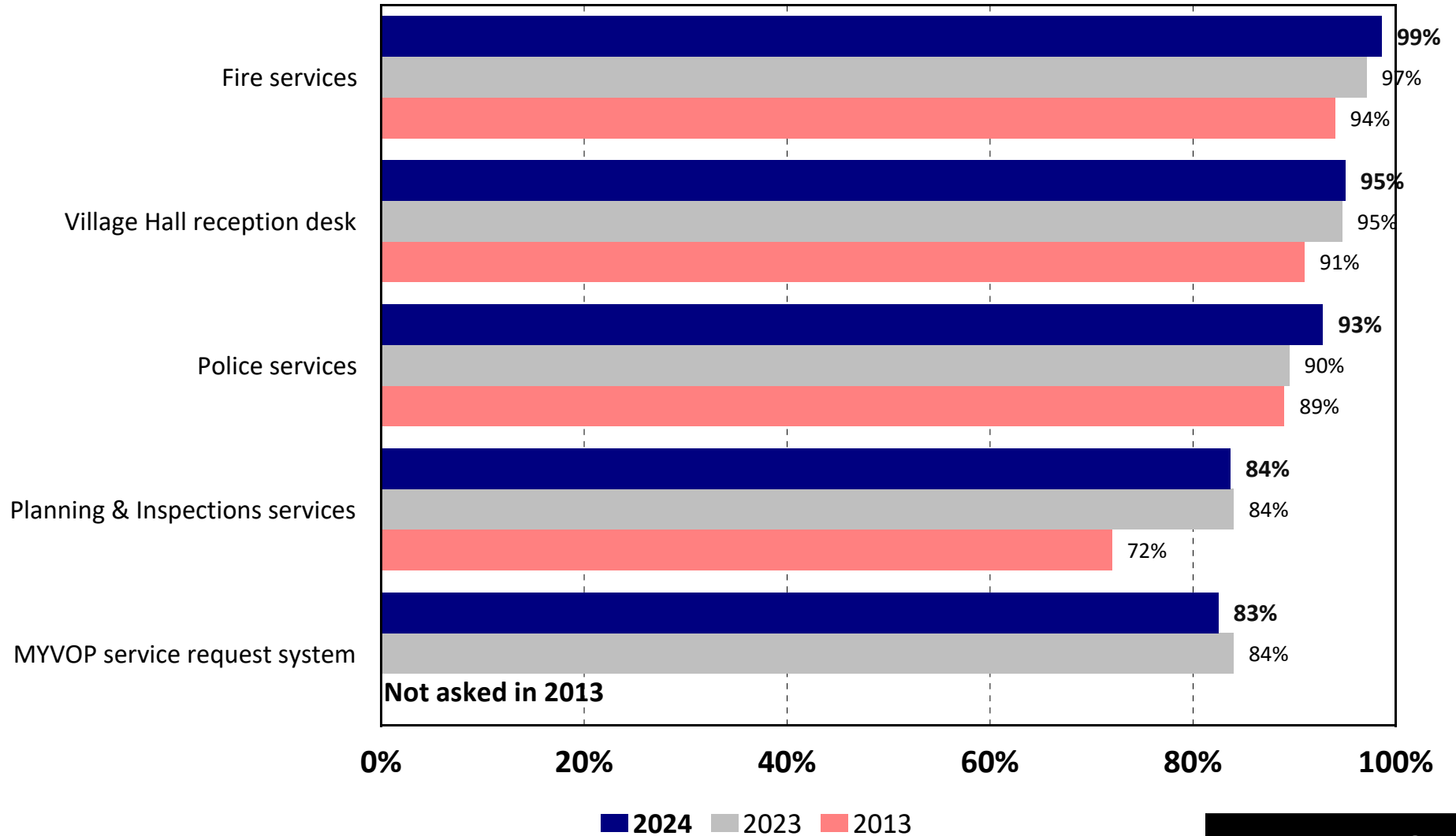
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding “no opinion”)



Q21[2]. Satisfaction With Village Services and Facilities

2024, 2023 & 2013

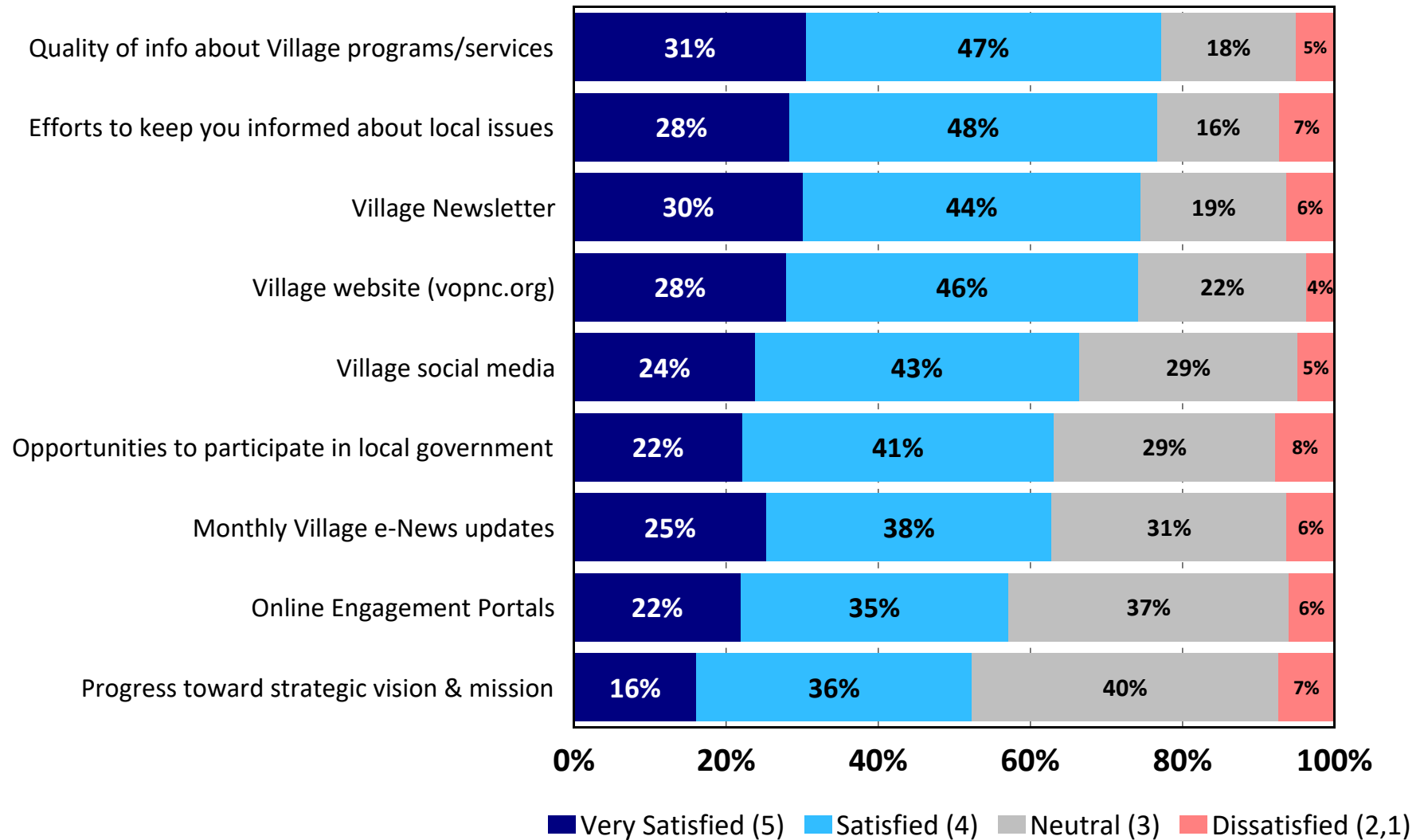
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding “no opinion”)



TRENDS

Q22. Satisfaction with Public Communication and Outreach

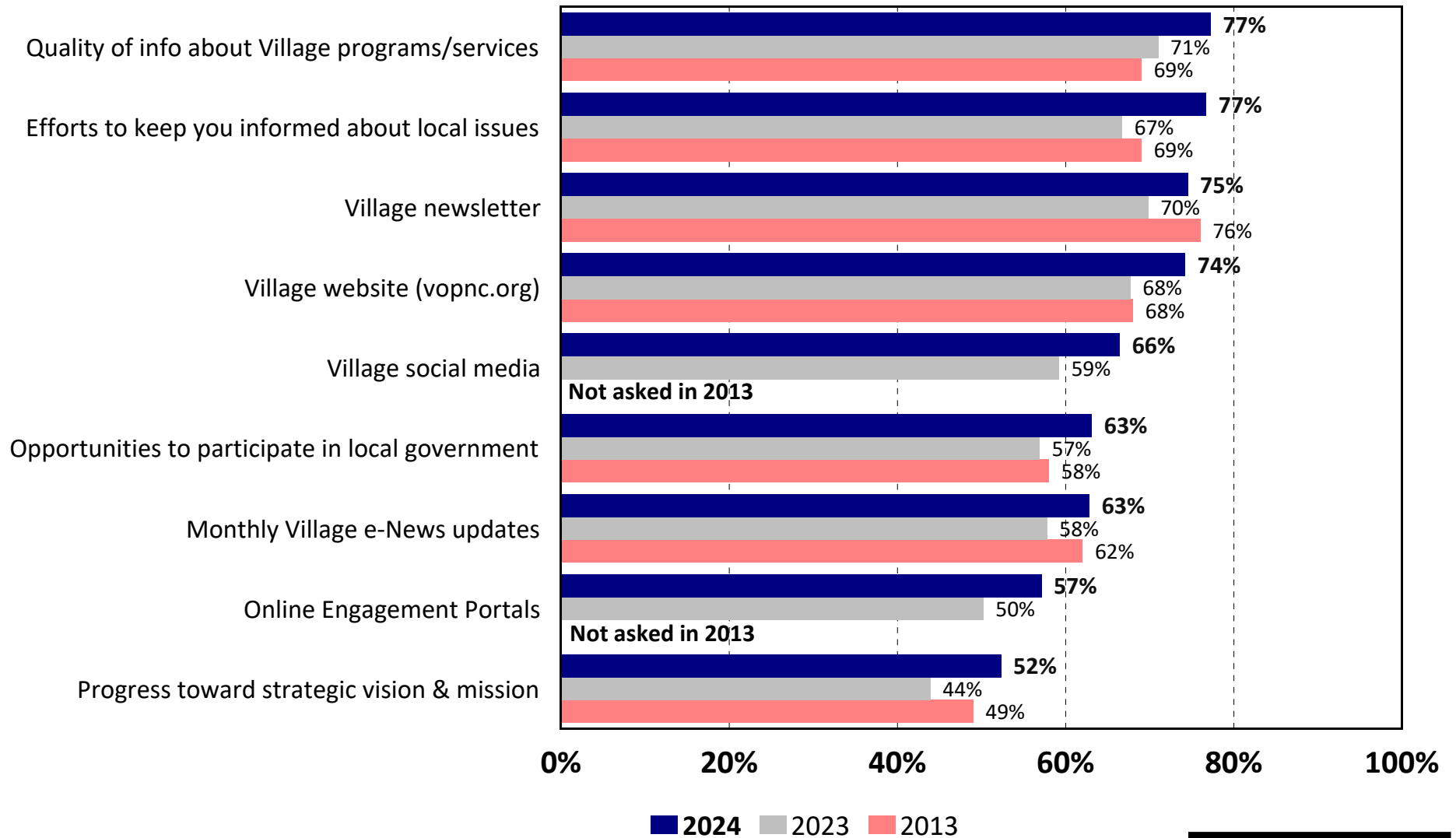
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding “no opinion”)



Q22. Satisfaction with Public Communication and Outreach

2024, 2023 & 2013

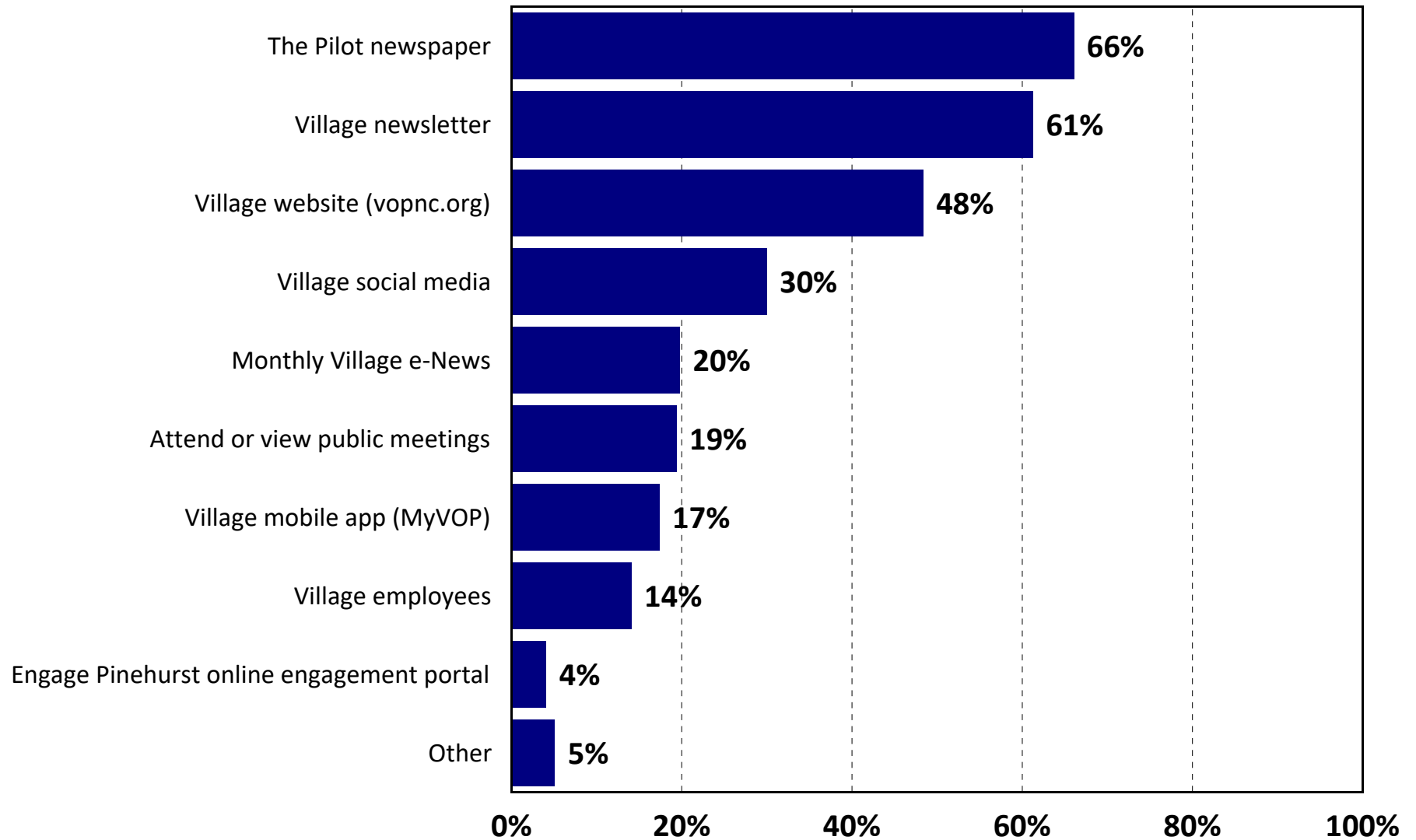
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding “no opinion”)



TRENDS

Q23. Which of the following do you use to get information about the Village of Pinehurst?

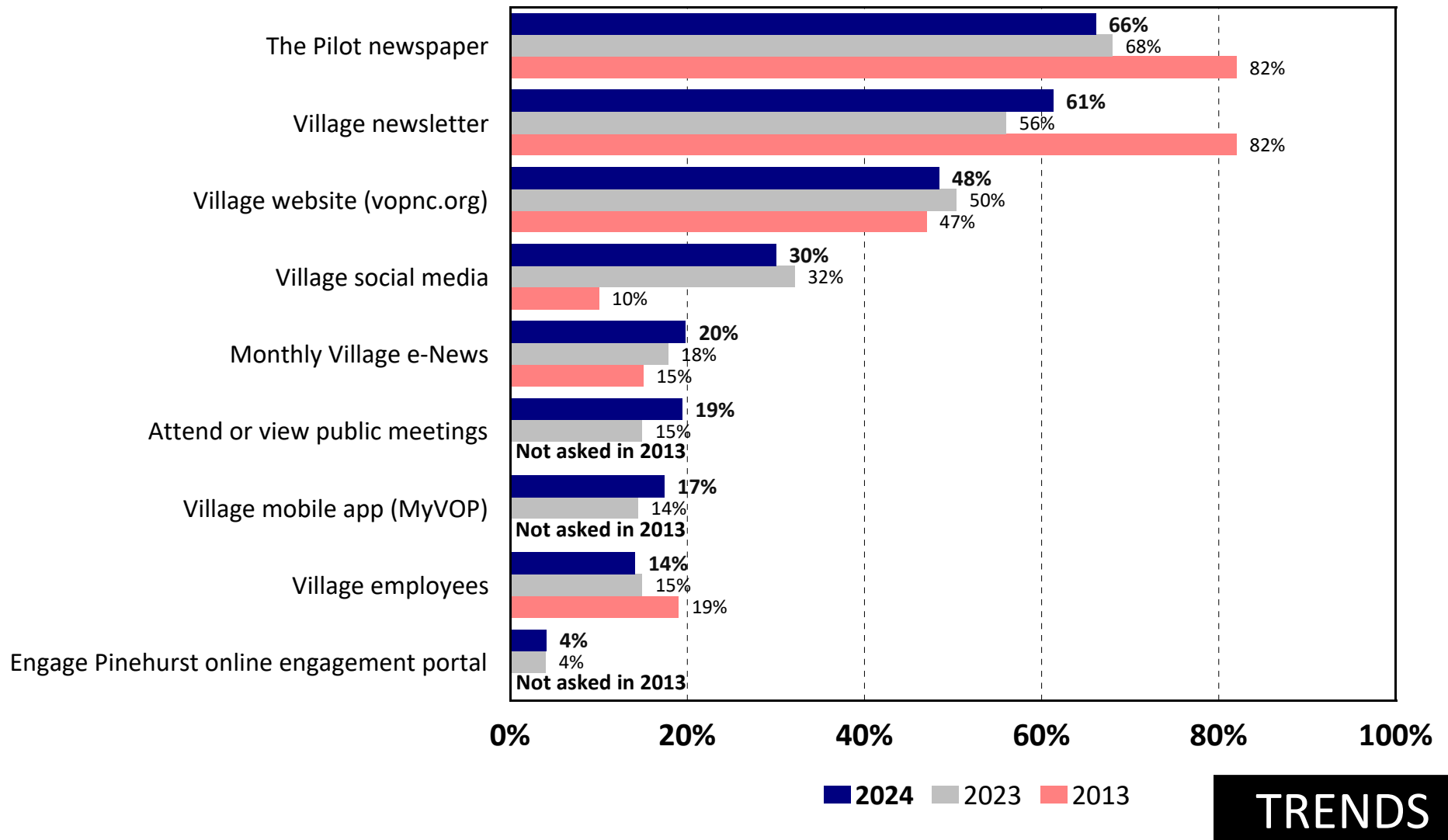
by percentage of respondents (multiple selections could be made)



Q24. Which of the following do you use to get information about the Village of Pinehurst?

2024, 2023 & 2013

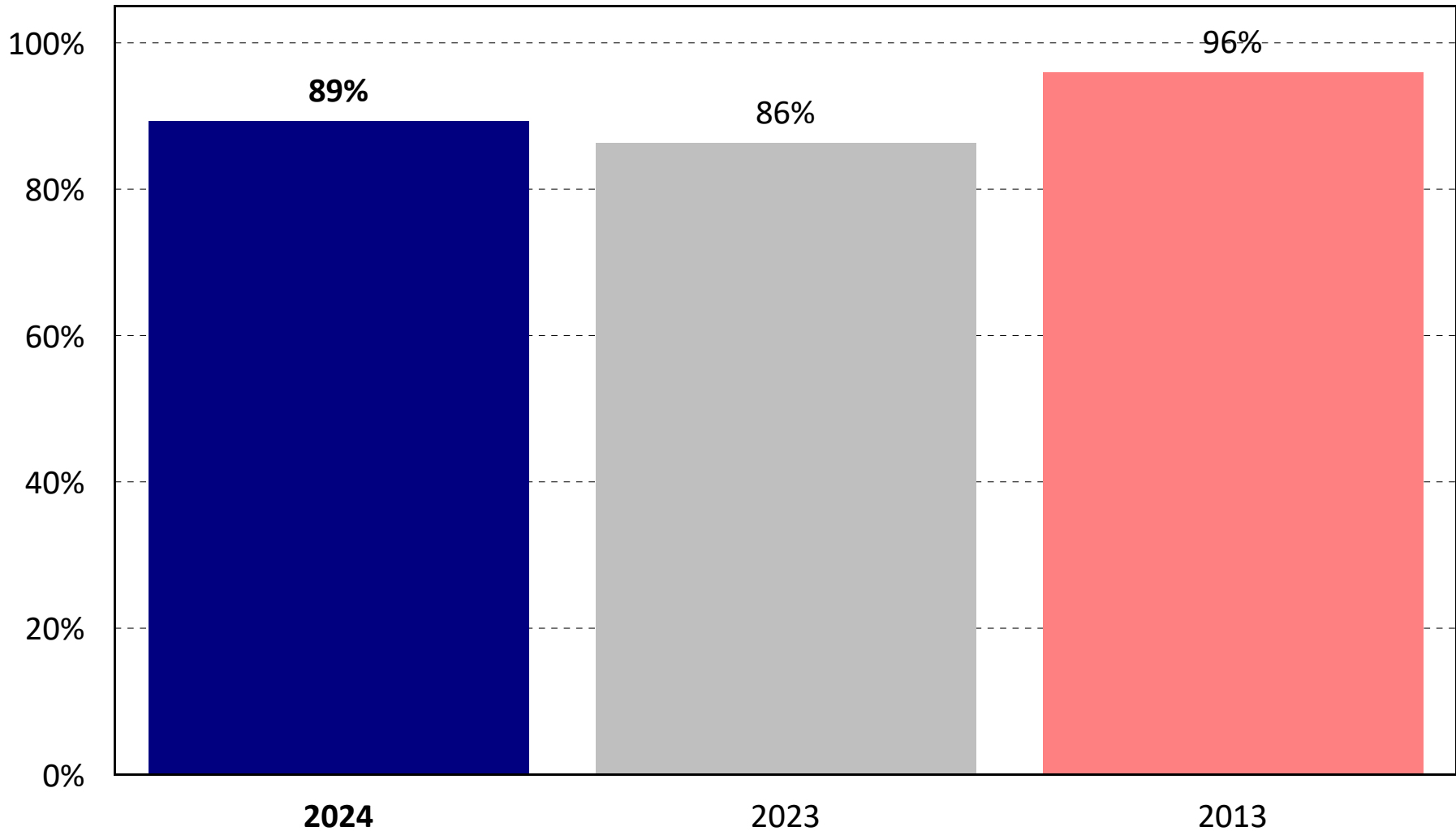
by percentage of respondents (multiple selections could be made)



TRENDS

Q24. How often do you read the Village Newsletter, which is mailed to all residents?

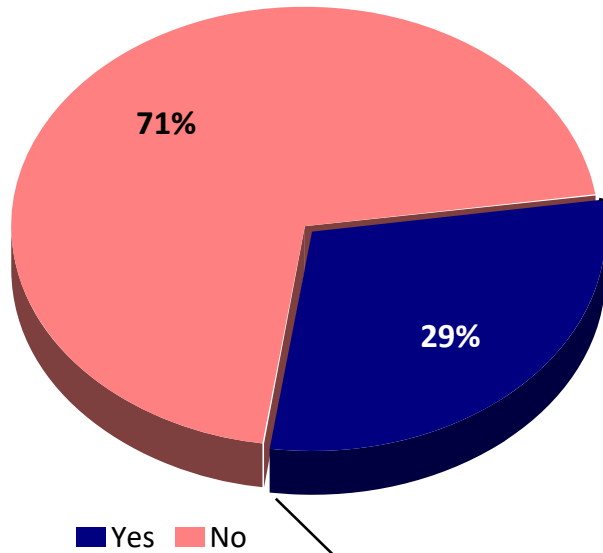
by percentage of respondents who answered “all the time” or “sometimes” (excluding “don’t know”)



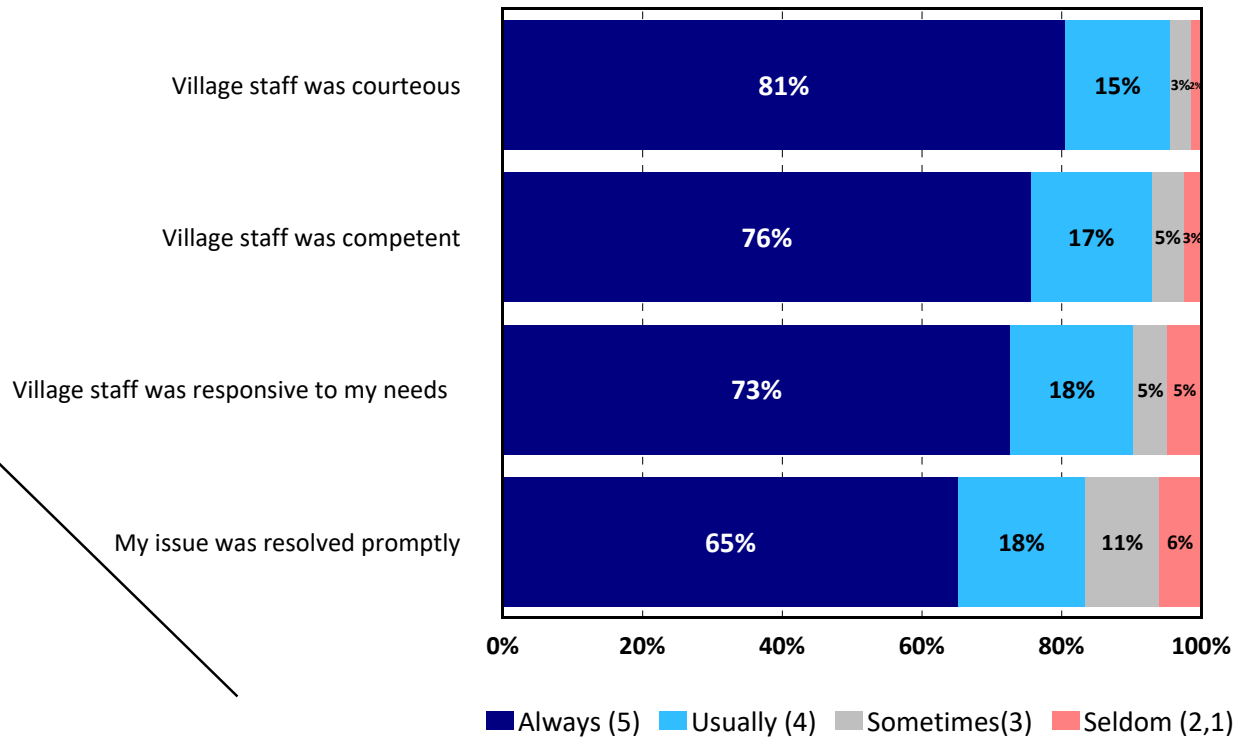
TRENDS

Q25. Have you contacted the Village during the past year?

by percentage of respondents

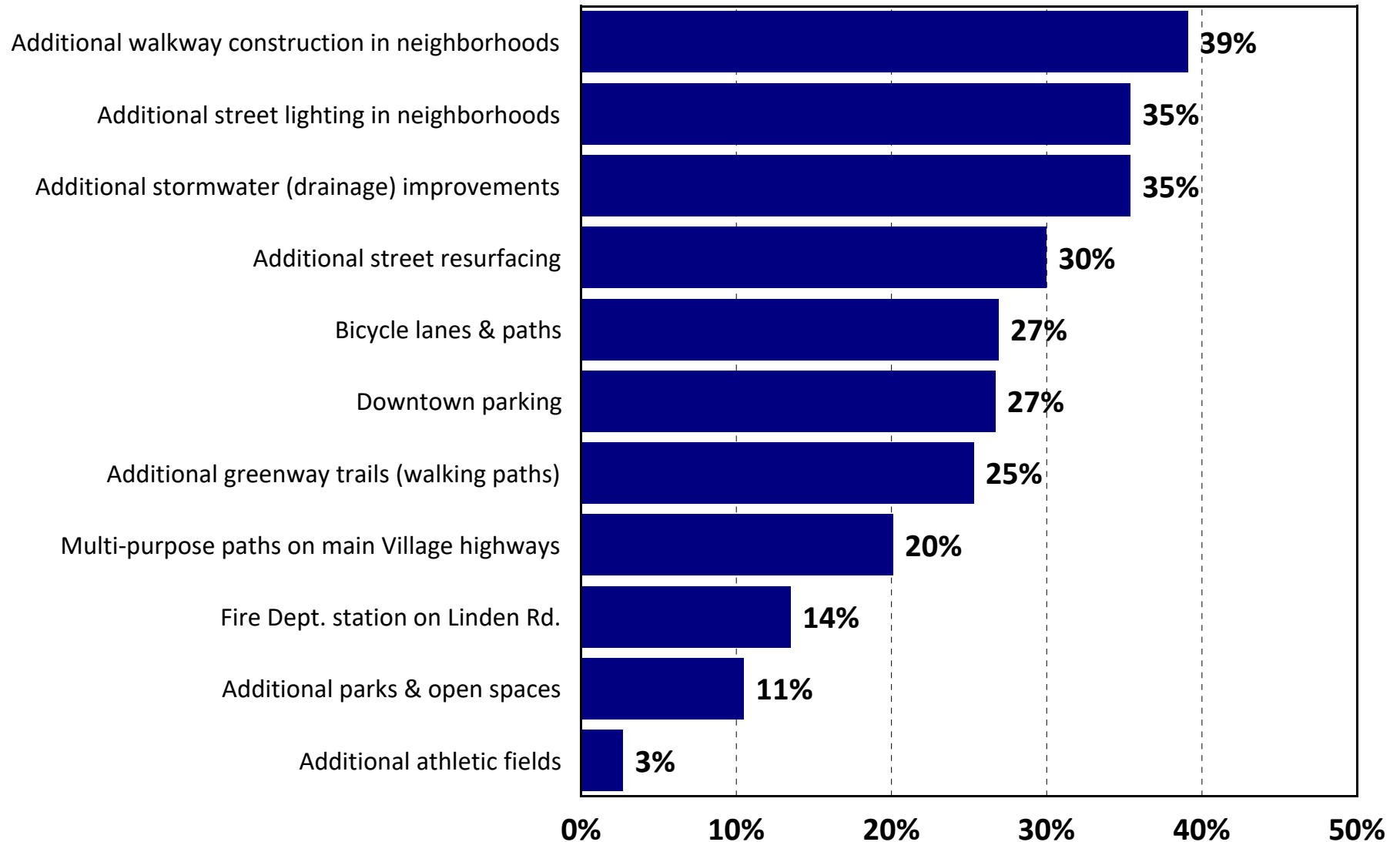


Q25a. Only if you have contacted the Village during the past year



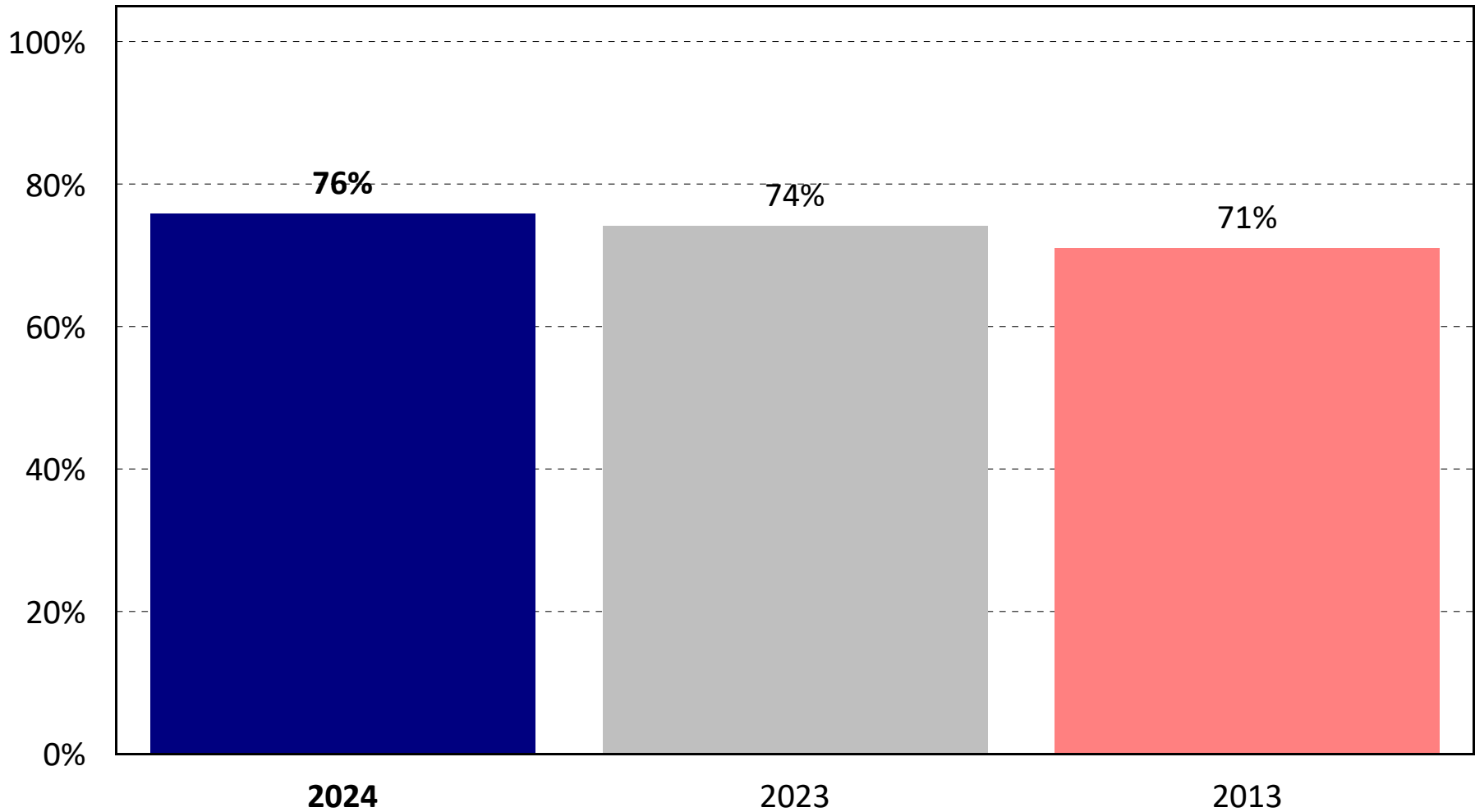
Q26. Community Improvements That Residents Feel Are Most Important

by percentage of respondents (3 selections could be made)



Q27. What is your level of satisfaction with the value you receive for the portion of your property taxes that funds the Village's operating budget?

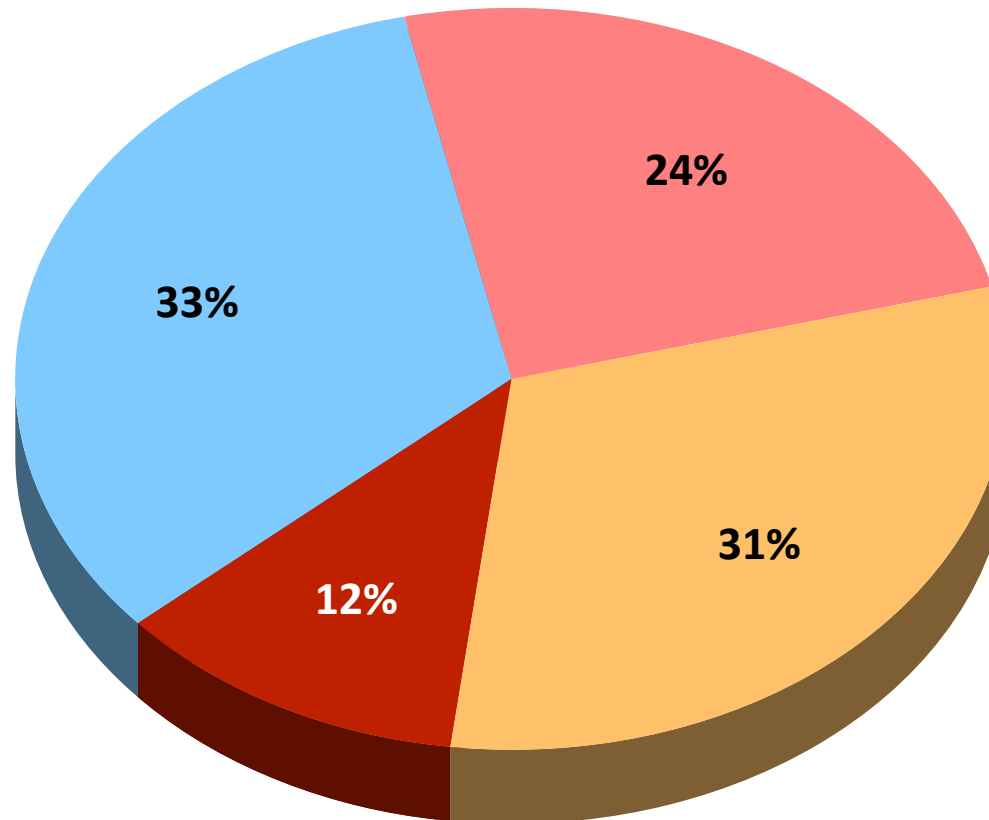
by percentage of respondents who answered "very satisfied" or "satisfied" (excluding "don't know")



TRENDS

Q28a. The language passed to regulate short-term rentals in the community is:

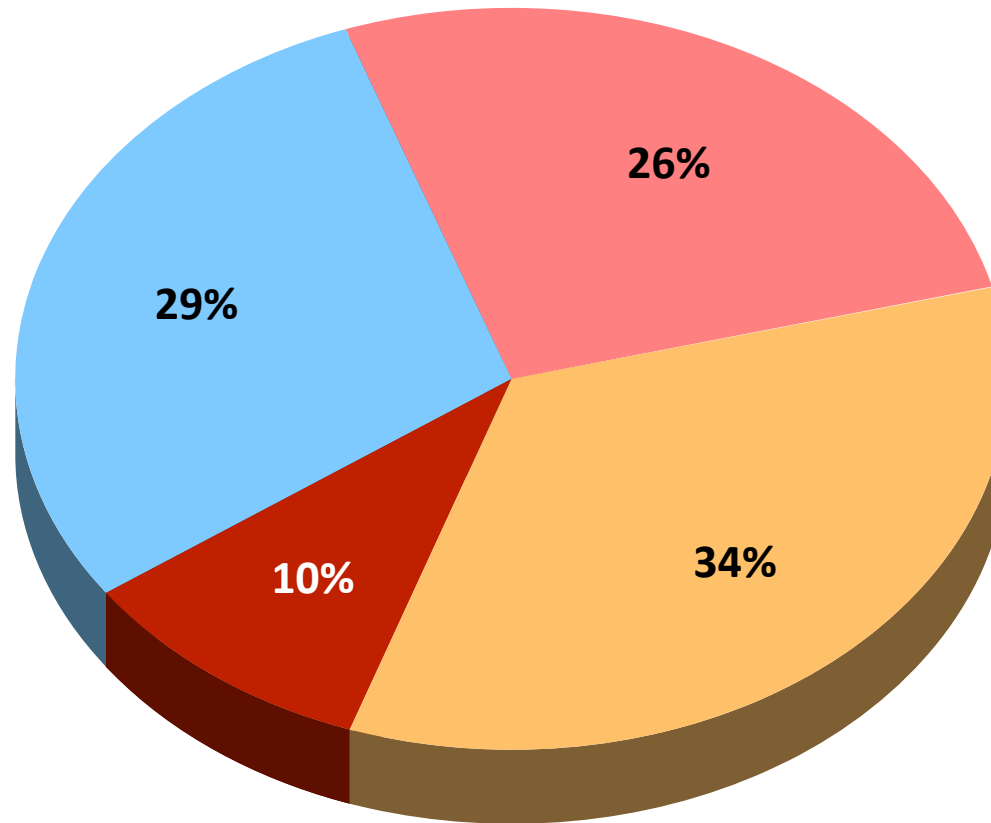
by percentage of respondents



Too lenient Just right Too strict Not sure

Q28b. I believe the Village's enforcement of short-term rental related regulations is:

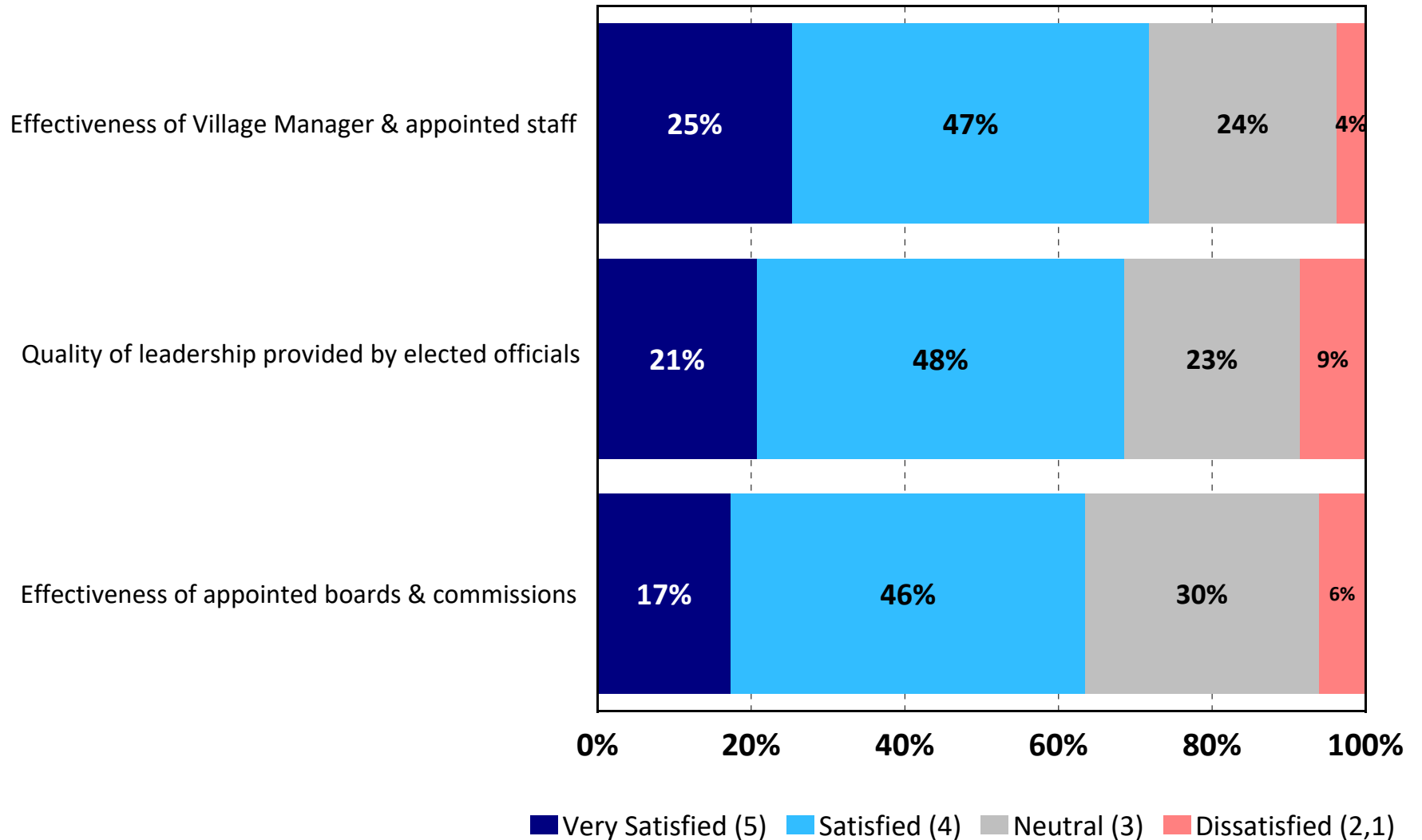
by percentage of respondents



■ Too little ■ About right ■ Too much ■ Not sure

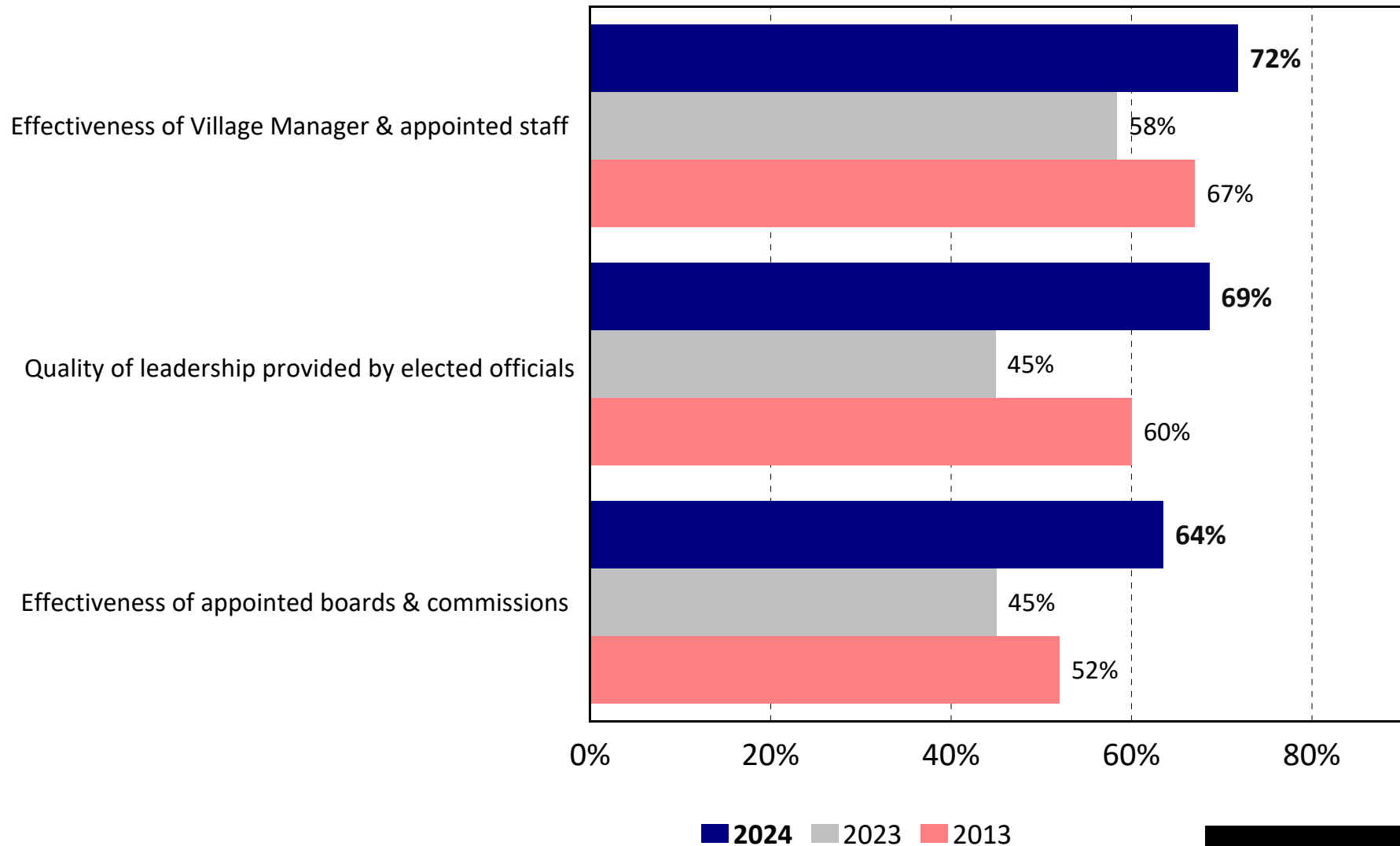
Q29. Please rate your satisfaction with the following aspects of Village leadership:

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



Q29. Satisfaction with Village Leadership 2024, 2023 & 2013

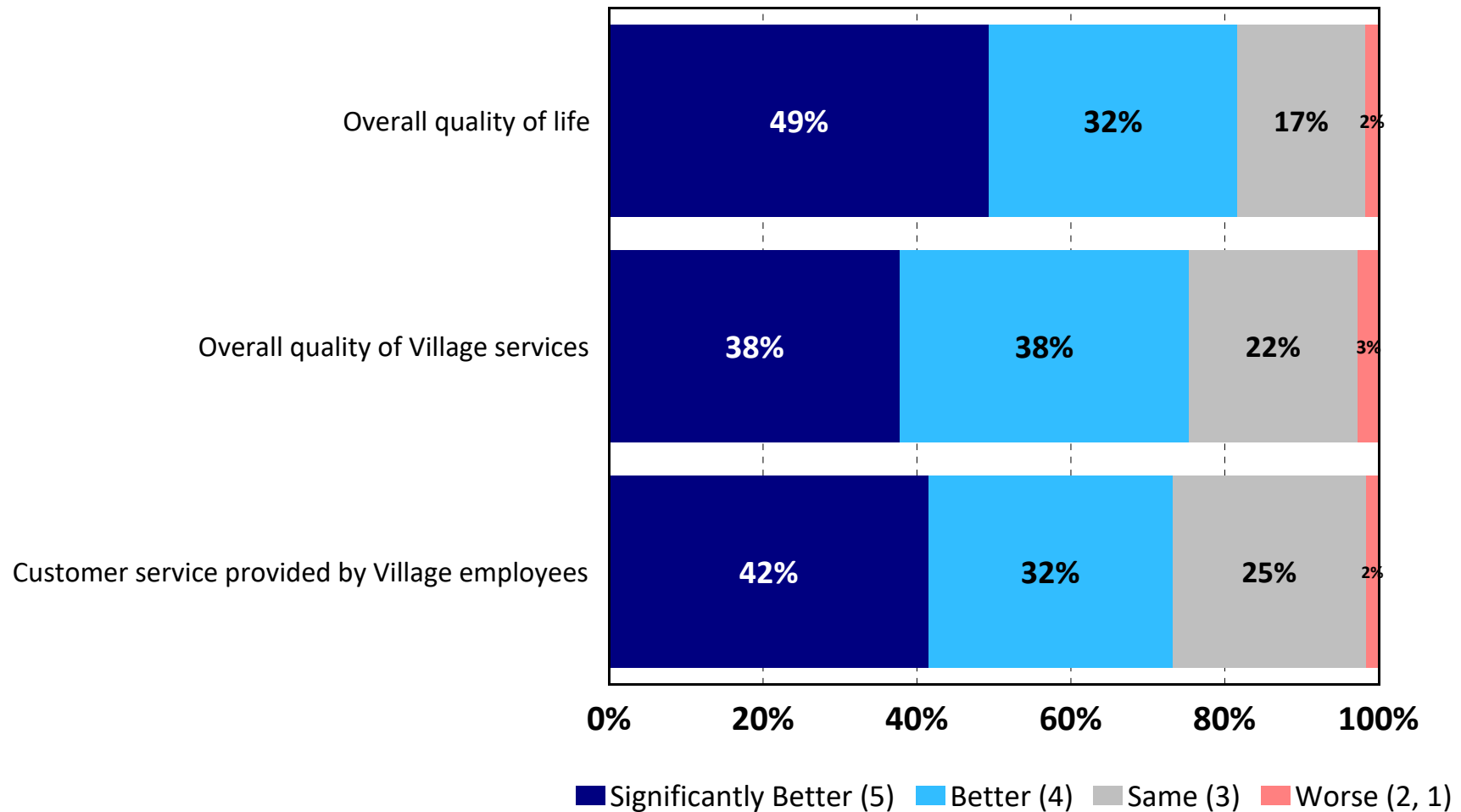
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding “no opinion”)



TRENDS

Q30. How would you rate your satisfaction with the following in Pinehurst compared to other places you have lived in the past?

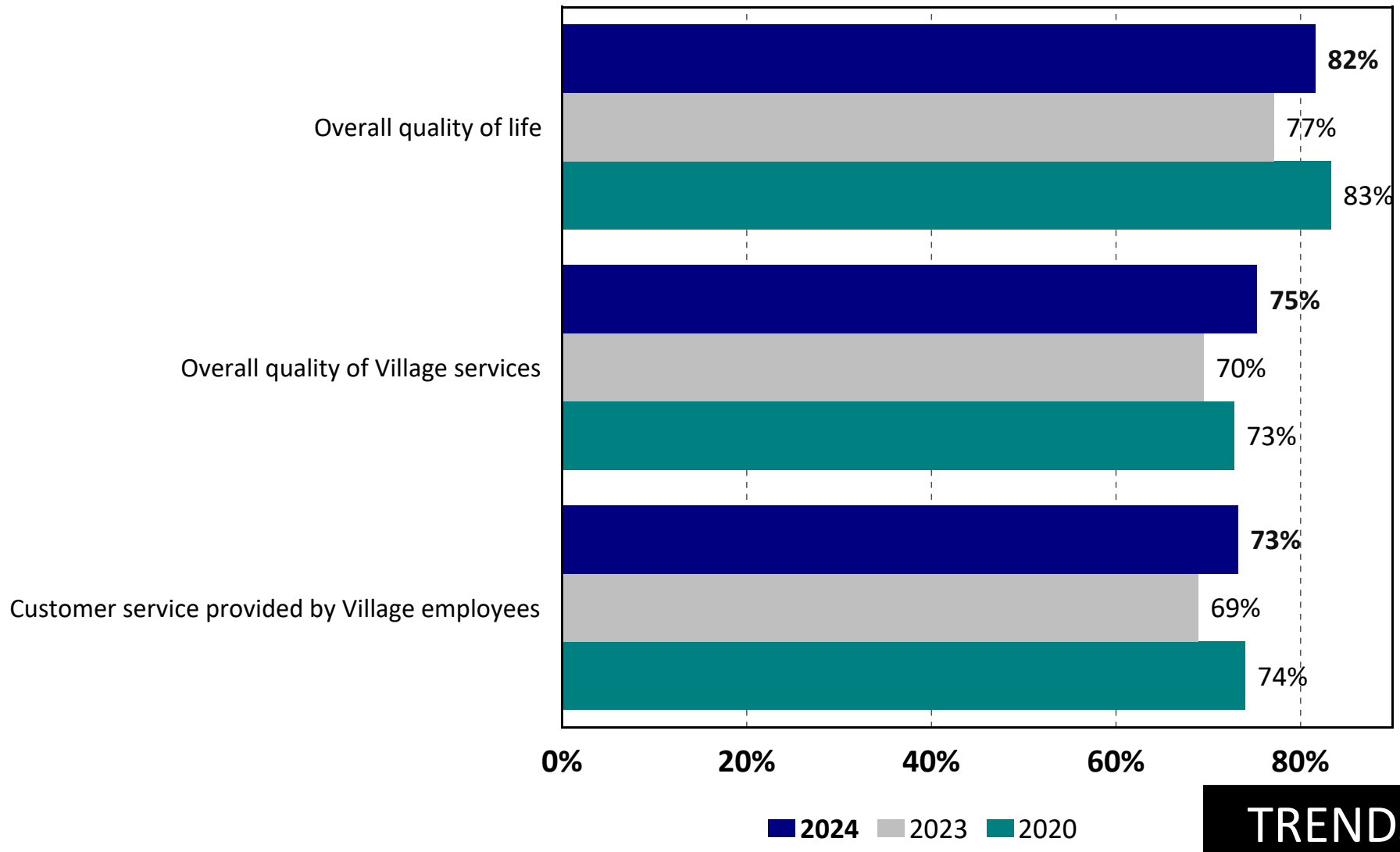
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding “no opinion”)



Q30. How would you rate your satisfaction with the following in Pinehurst compared to other places you have lived in the past?

2024, 2023 & 2020

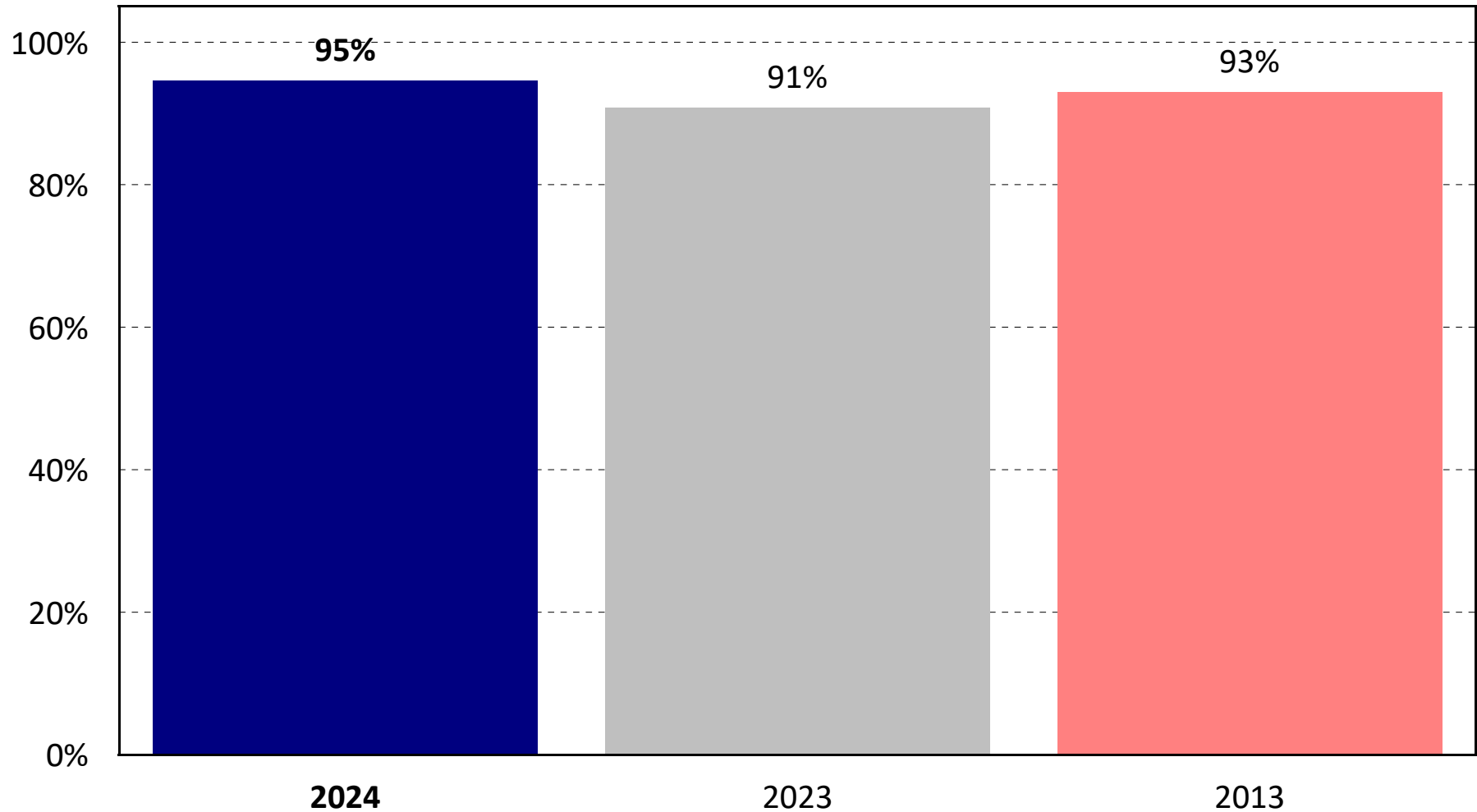
by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding “no opinion”)



TRENDS

Q31. Would you recommend Pinehurst to others as a place to live?

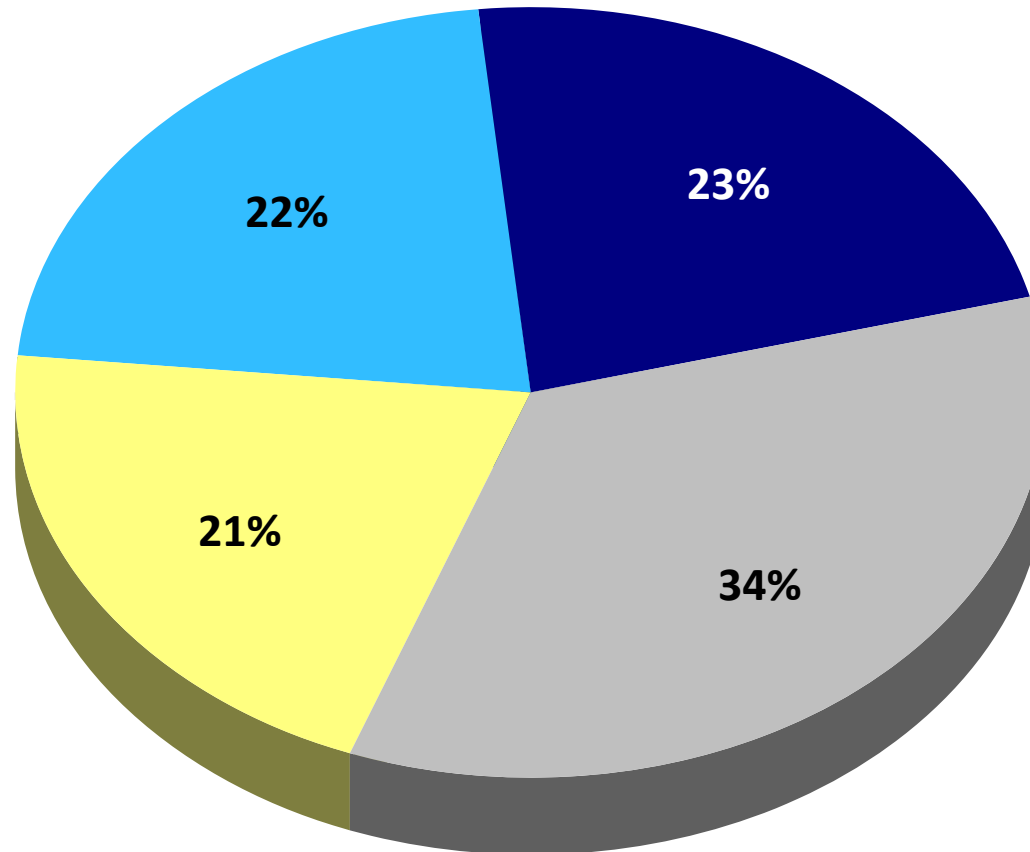
by percentage of respondents who answered "yes" (excluding "not provided")



TRENDS

Demographics: Approximately how many years have you lived in the Village of Pinehurst?

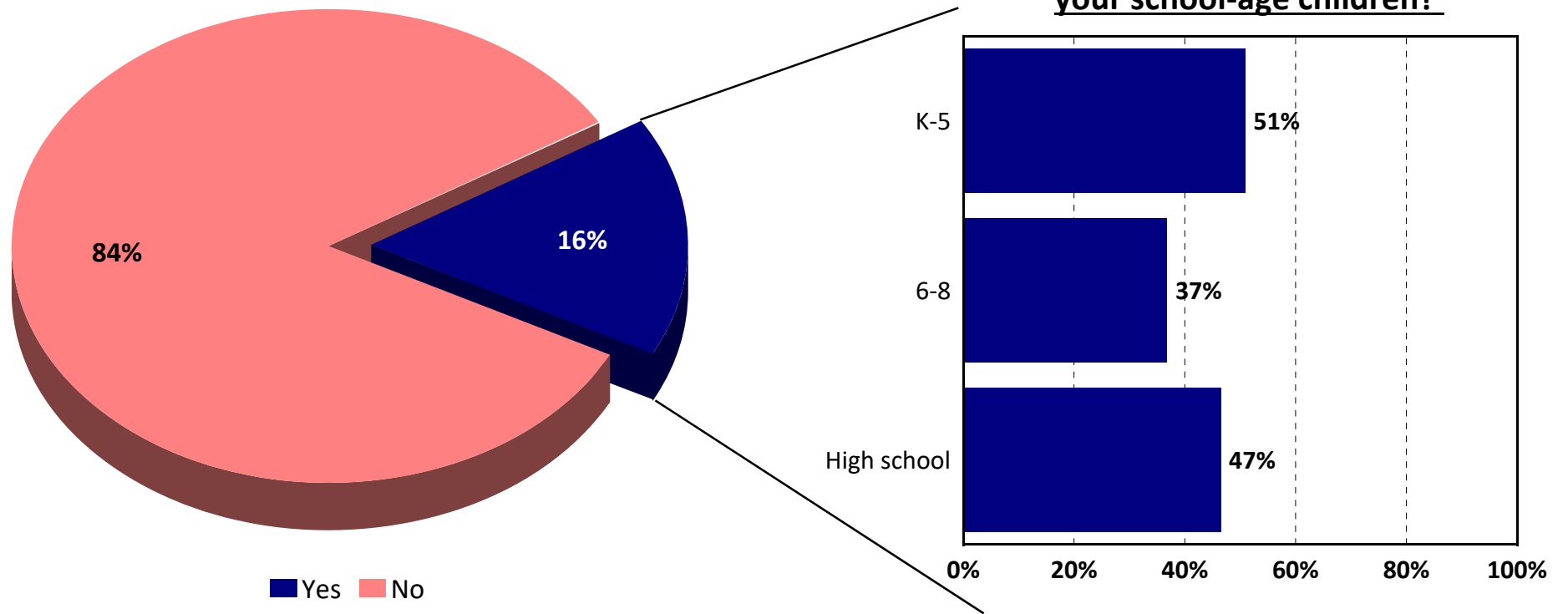
by percentage of respondents (excluding "not provided")



■ Less than 5 years ■ 5-10 years ■ 11-20 years ■ 20+ years

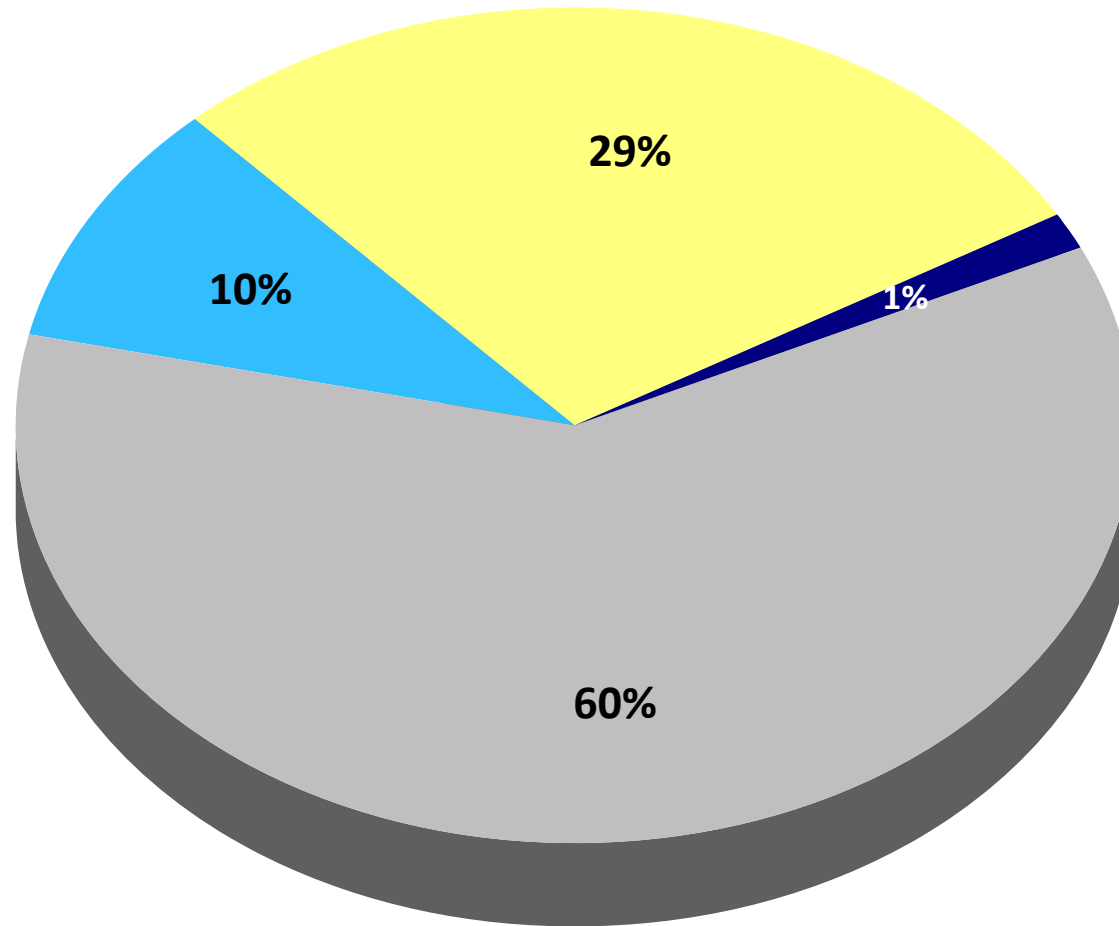
Demographics: Do you have school age children (grades K-12) living at home?

by percentage of respondents



Demographics: Current Employment Status

by percentage of respondents (excluding "not provided")

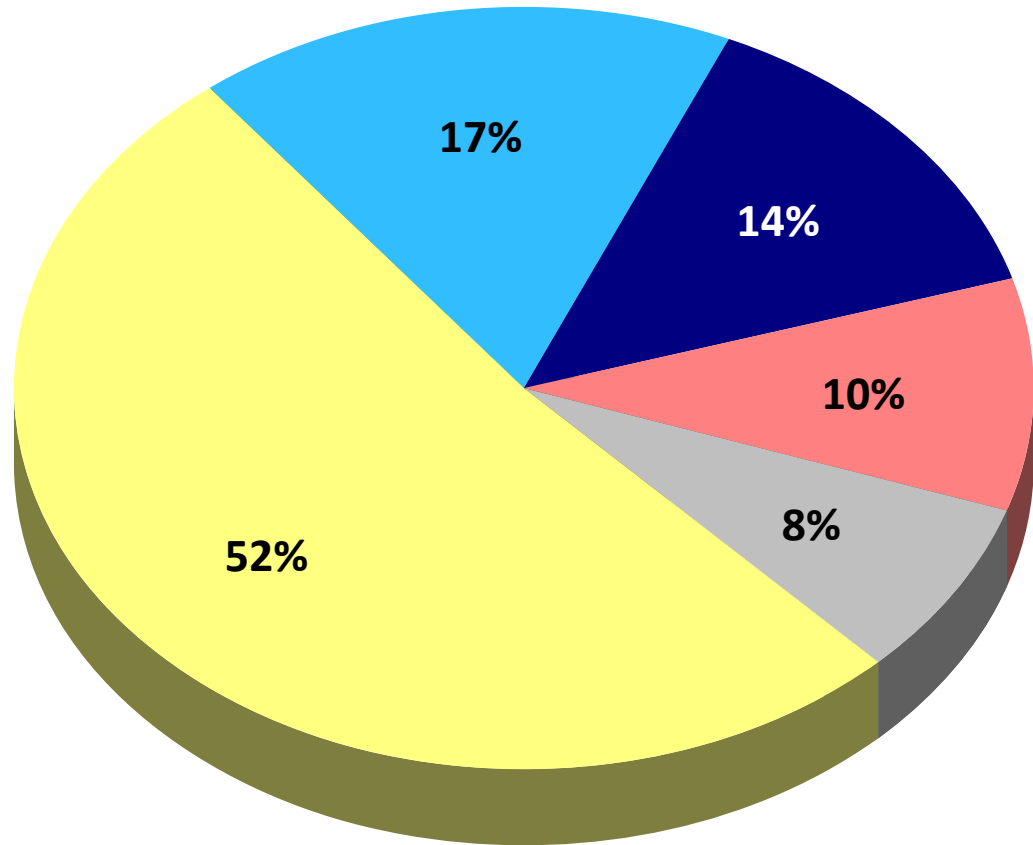


Employed outside home Employed in home/have home-based business
Retired Not currently employed

0.3% are students

Demographics: Age of Respondents

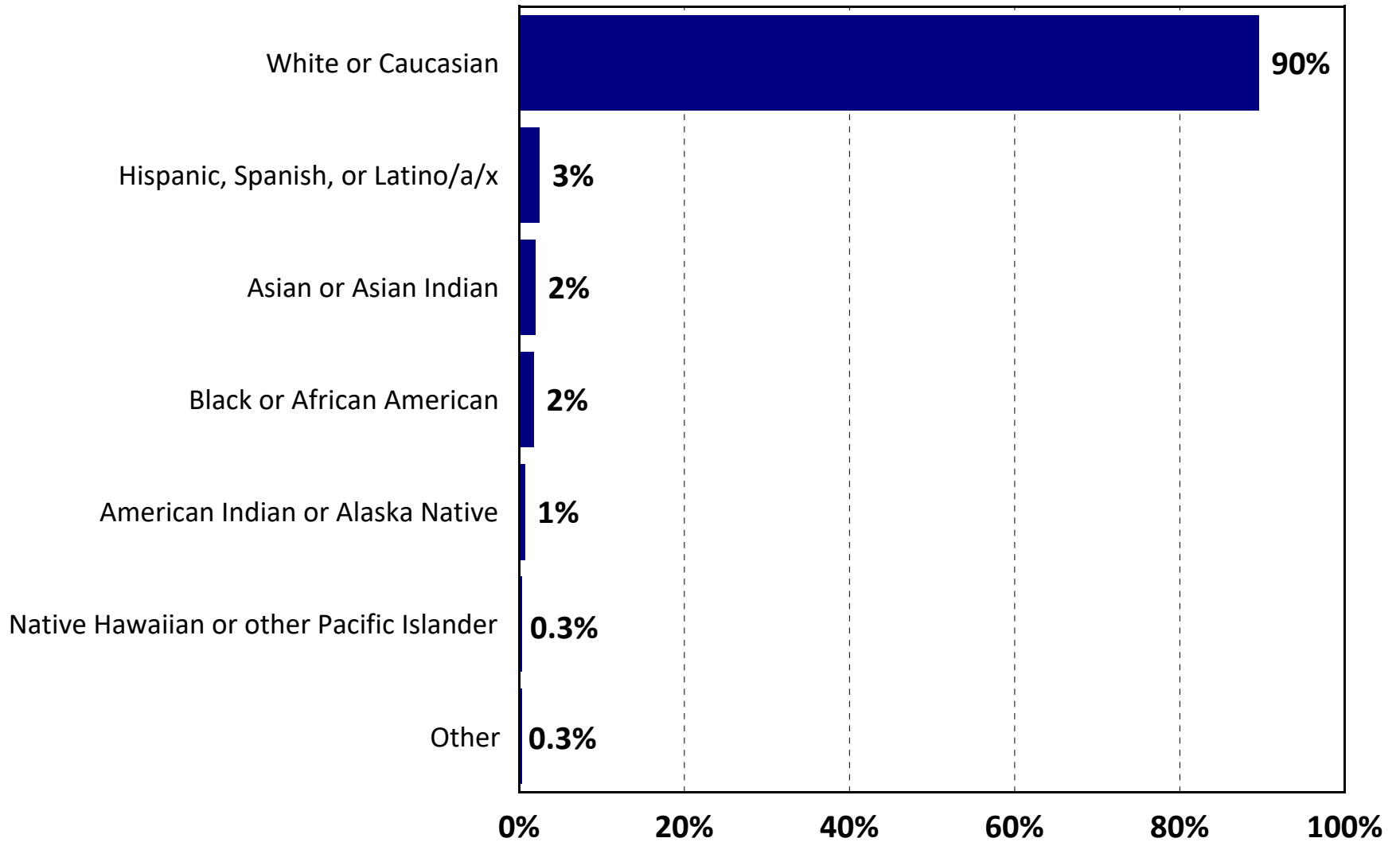
by percentage of respondents (excluding “not provided”)



■ Under 35 years ■ 35-44 years ■ 45-54 years ■ 55-64 years ■ 65+ years

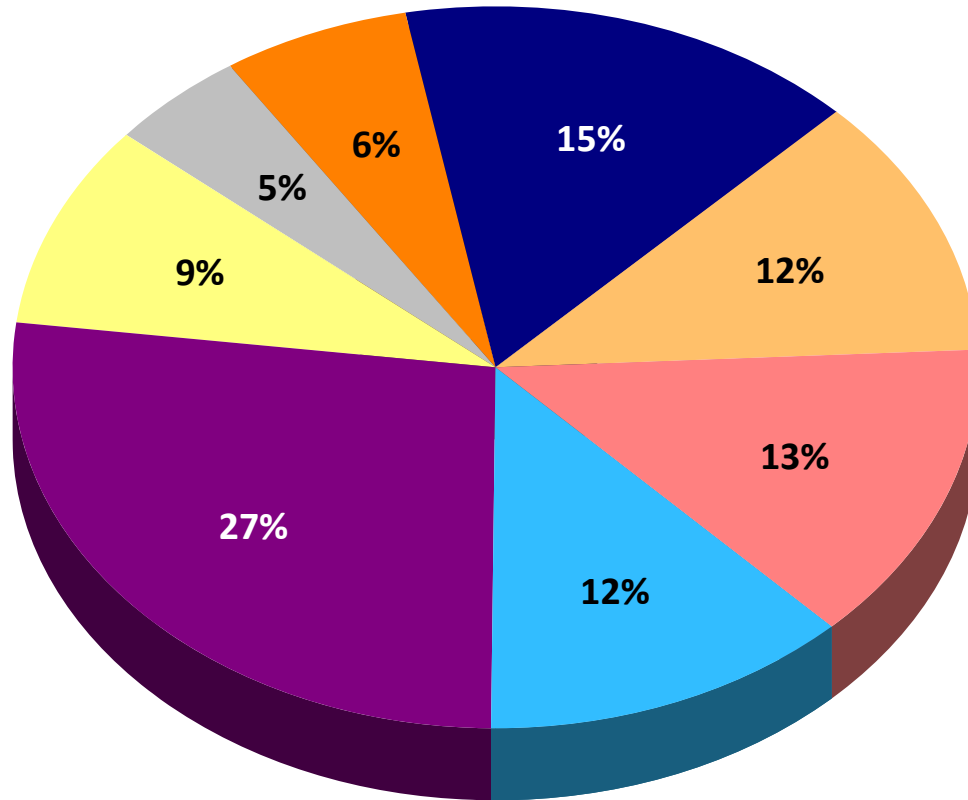
Demographics: Which of the following best describes your race?

by percentage of respondents (multiple selections could be made)



Demographics: Which of the following best describes where you live?

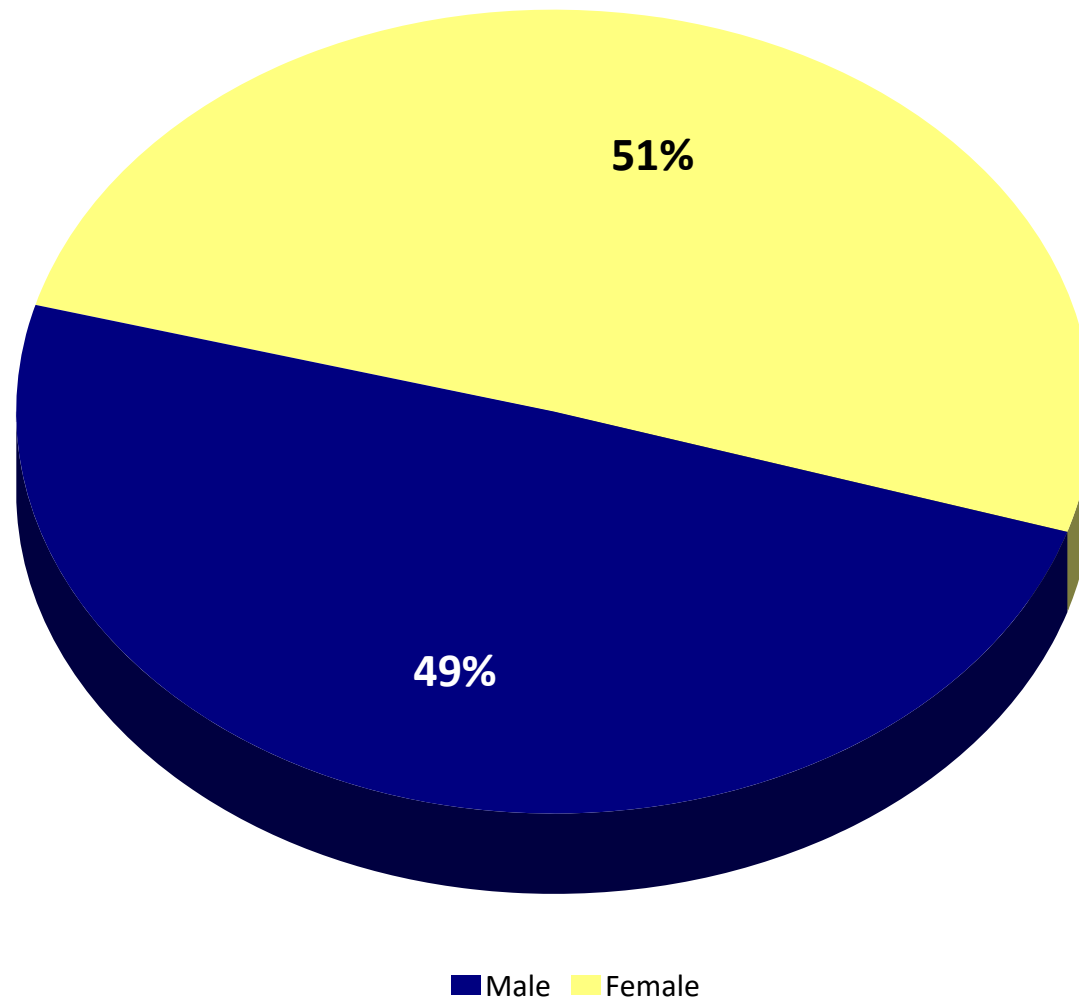
by percentage of respondents (excluding "not provided")



- Pinehurst No. 6
- Pinehurst No. 7/Lawn & Tennis/CCNC
- Lake Pinehurst/Burning Tree/St. Andrews/Cotswold
- Old Town/Linden Rd./Donald Ross Dr./Clarendon Gardens
- Pinehurst Trace/Pinedale/Midland Country Club/Taylorhurst/Walker Station
- Morganton/Monticello Rd.
- Pinewild
- Village Acres/Murdocksville Rd.

Demographics: Gender

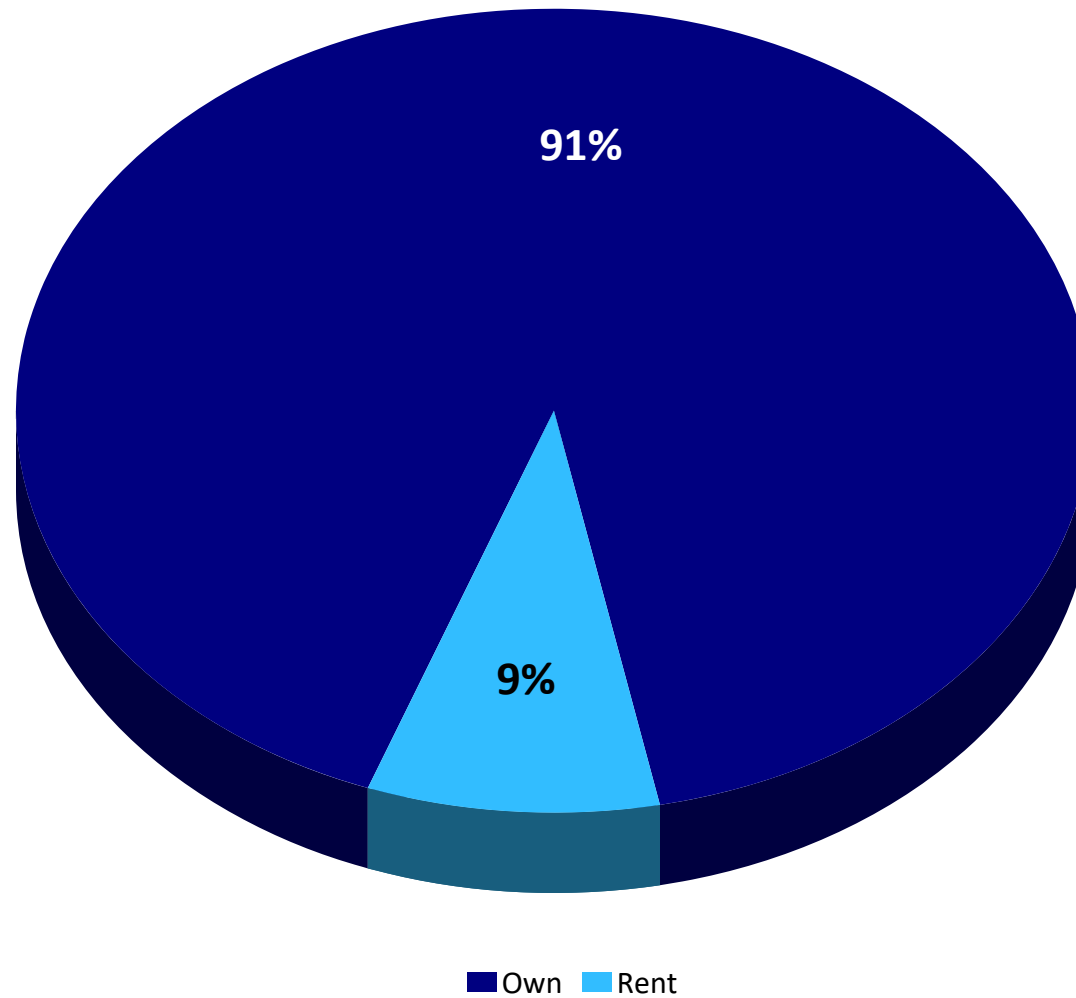
by percentage of respondents (excluding “not provided”)



0.2% are non-binary or prefer to self-describe

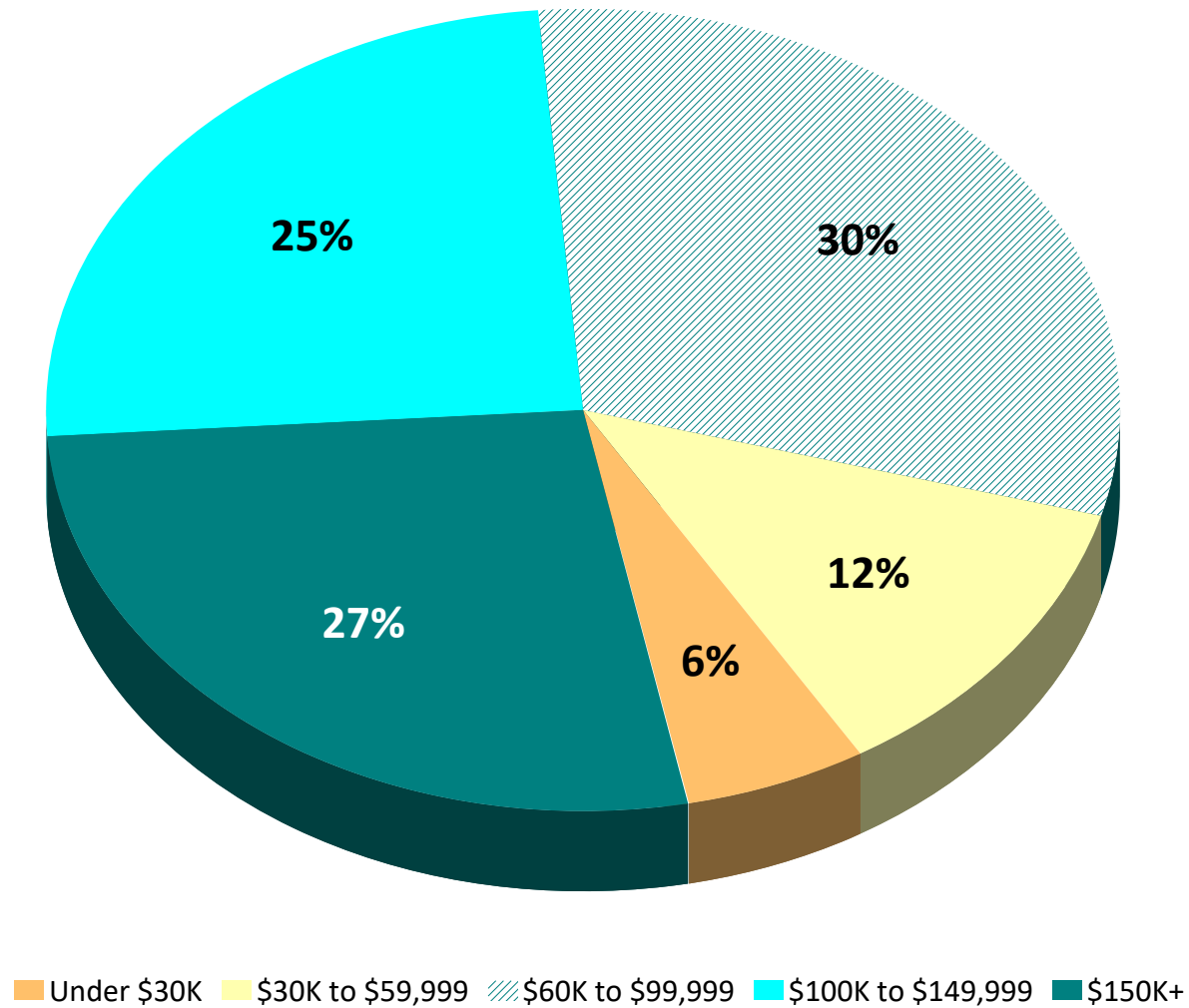
Demographics: Do you own or rent your current address?

by percentage of respondents (excluding "not provided")



Demographics: Total Annual Household Income

by percentage of respondents (excluding “not provided”)





2

Benchmarking Analysis

Benchmarking Analysis



Overview

ETC Institute's *DirectionFinder*® program was originally developed in 1999 to help community leaders across the United States use statistically valid community survey data as a tool for making better decisions. Since November of 1999, the survey has been administered in more than 500 communities in 50 states. Most participating communities conduct the survey on an annual or biennial basis.

This report contains benchmarking data from three sources: (1) a national survey that was administered by ETC Institute during the summer of 2023 to a random sample of more than 10,000 residents across the United States, (2) a regional survey administered during the summer of 2023 to a random sample of residents in the Atlantic Region of the United States; the Atlantic Region includes the states of North Carolina, Virginia, West Virginia, Maryland, Delaware, and the District of Columbia, and (3) from individual surveys that were administered in 36 communities with populations of fewer than 30,000 residents between January 2023 and September 2024. The average shown in the performance range charts is the average rating of the 36 communities listed below:

- Brown County, Kansas
- Camas, Washington
- Carrboro, North Carolina
- Clayton, Missouri
- Edgerton, Kansas
- Emporia, Kansas
- Fairway, Kansas
- Glencoe, Illinois
- Gulf Shores, Alabama
- Hastings, Nebraska
- Hillsborough, North Carolina
- Hudson, Ohio
- Hutto, Texas
- Johnston, Iowa
- Key Biscayne, Florida
- Kirkwood, Missouri
- Knightdale, North Carolina
- Lake Forest, Illinois
- Lebanon, Missouri
- Lincolnwood, Illinois
- Maryland Heights, Missouri
- Mercer Island, Washington
- Merriam, Kansas
- Montrose, Colorado
- Mountain Brook, Alabama
- Newcastle, Washington
- North Bend, Washington
- North Kansas City, Missouri
- Pitkin County, Colorado
- Robinson, Texas
- Roeland Park, Kansas
- Sequim, Washington
- Siloam Springs, Arkansas
- Volente, Texas
- Washougal, Washington
- Winchester, Virginia

Benchmarking Analysis



Interpreting the Charts

The charts on the following pages show how the overall results for Pinehurst compare to the national and regional averages based on the results of the survey administered by ETC Institute during the summer of 2023. The “National Average” shown in the charts reflects the overall results of ETC Institute’s national survey of more than 10,000 residents, and the “Atlantic Region” reflects the results of the survey of residents in the states listed on the previous page.

Performance Range Charts. The second set of charts show comparisons for several items that were rated on the survey. The horizontal bars show the range of satisfaction among residents in communities of fewer than 30,000 that have participated in the *DirectionFinder*® Survey since January 2023. The lowest and highest satisfaction ratings are listed to the left and right of each bar. The yellow dot on each bar shows how the results for Pinehurst compare to the average for communities with fewer than 30,000 residents, which is shown as a vertical dash in the middle of each horizontal bar. If the yellow dot is located to the right of the vertical dash, the Village of Pinehurst is rated higher than the community average. If the yellow dot is located to the left of the vertical dash, the Village is rated below the community average.

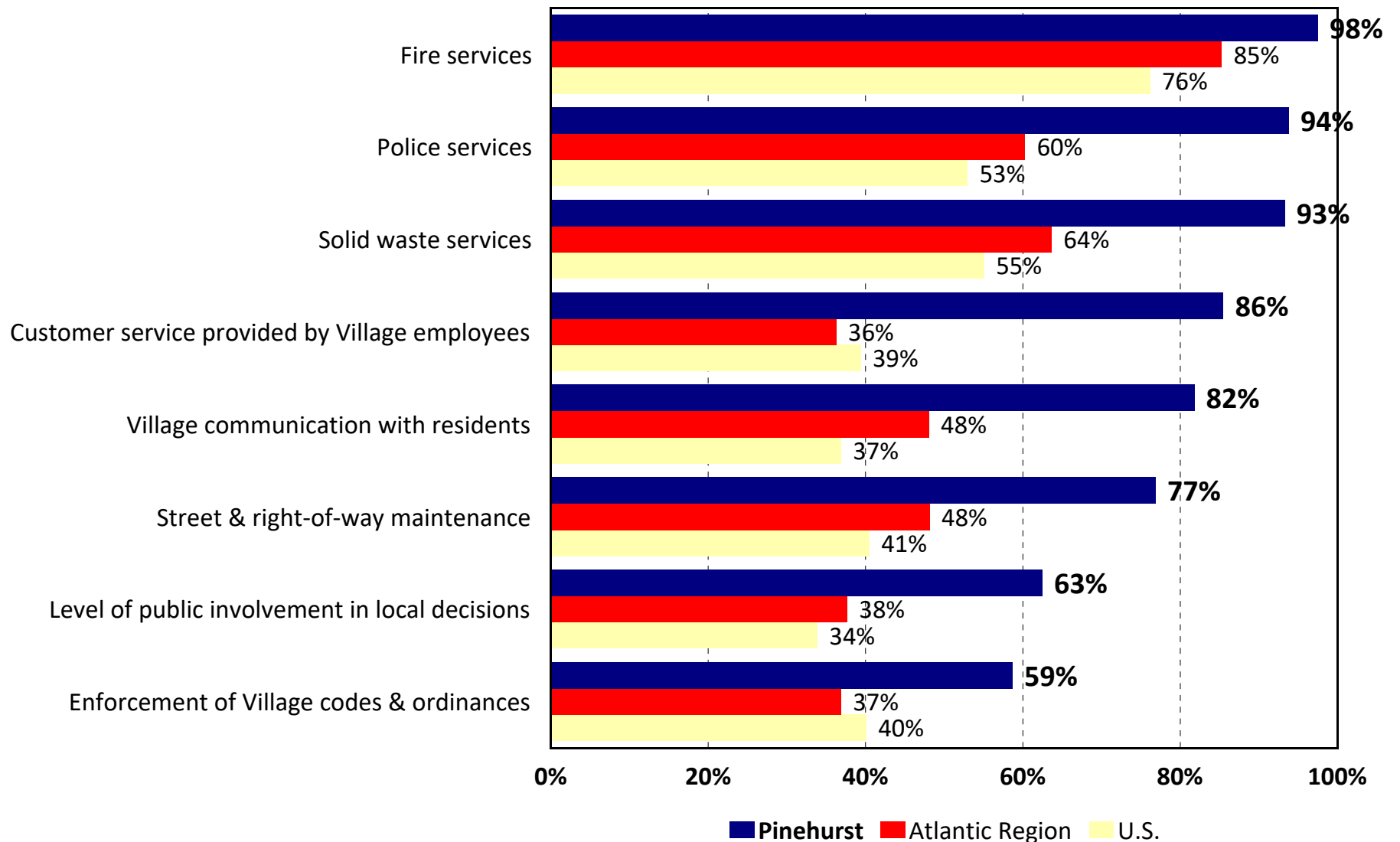
National Benchmarks

Note: The benchmarking data contained in this report is protected intellectual property. Any reproduction of the benchmarking information in this report by persons or organizations not directly affiliated with the Village of Pinehurst is not authorized without written consent from ETC Institute.

Overall Satisfaction with Various Community Services

Pinehurst vs. Atlantic Region vs. the U.S.

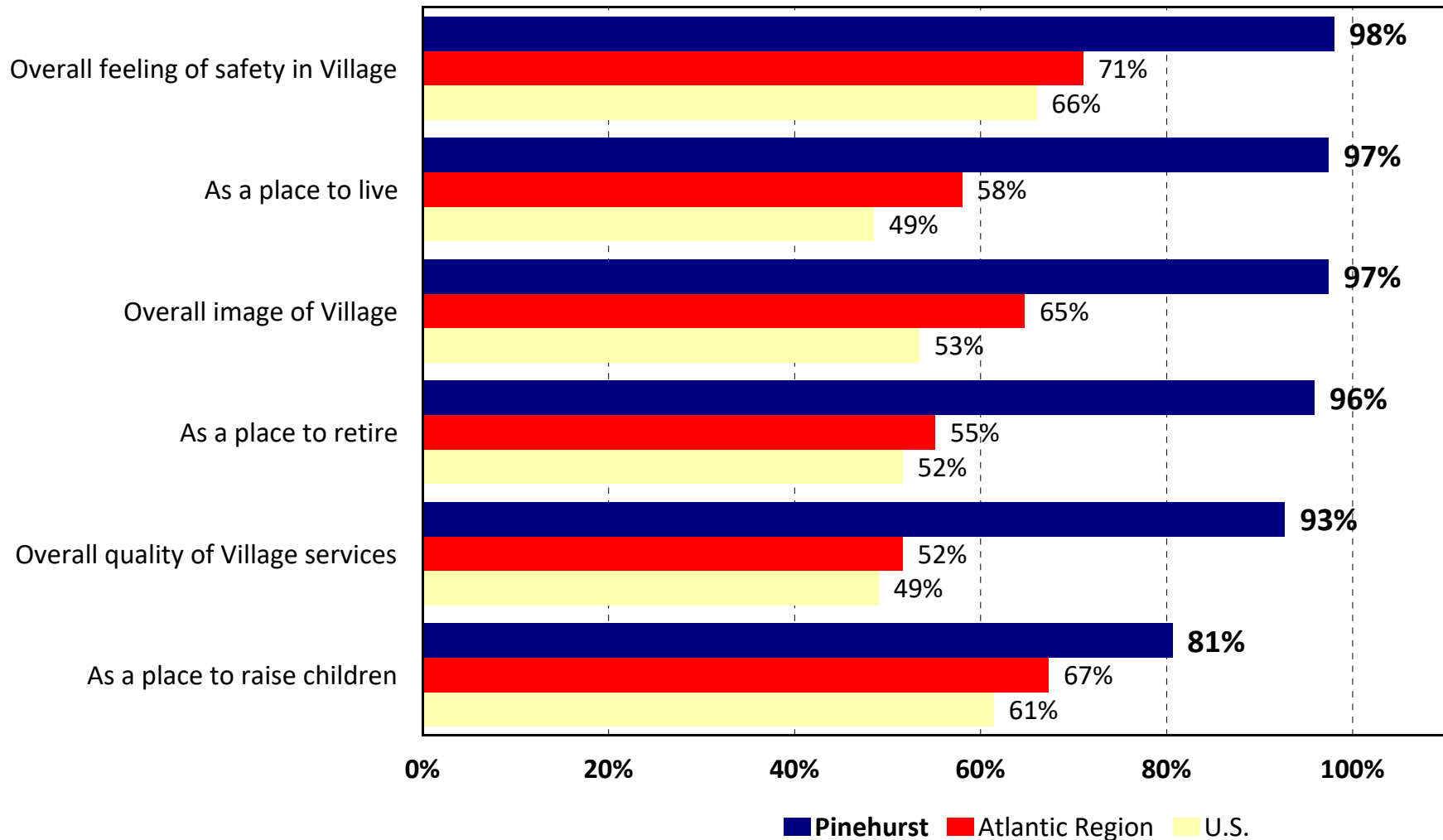
by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)



Satisfaction with Issues that Influence Perceptions of the Village

Pinehurst vs. Atlantic Region vs. the U.S.

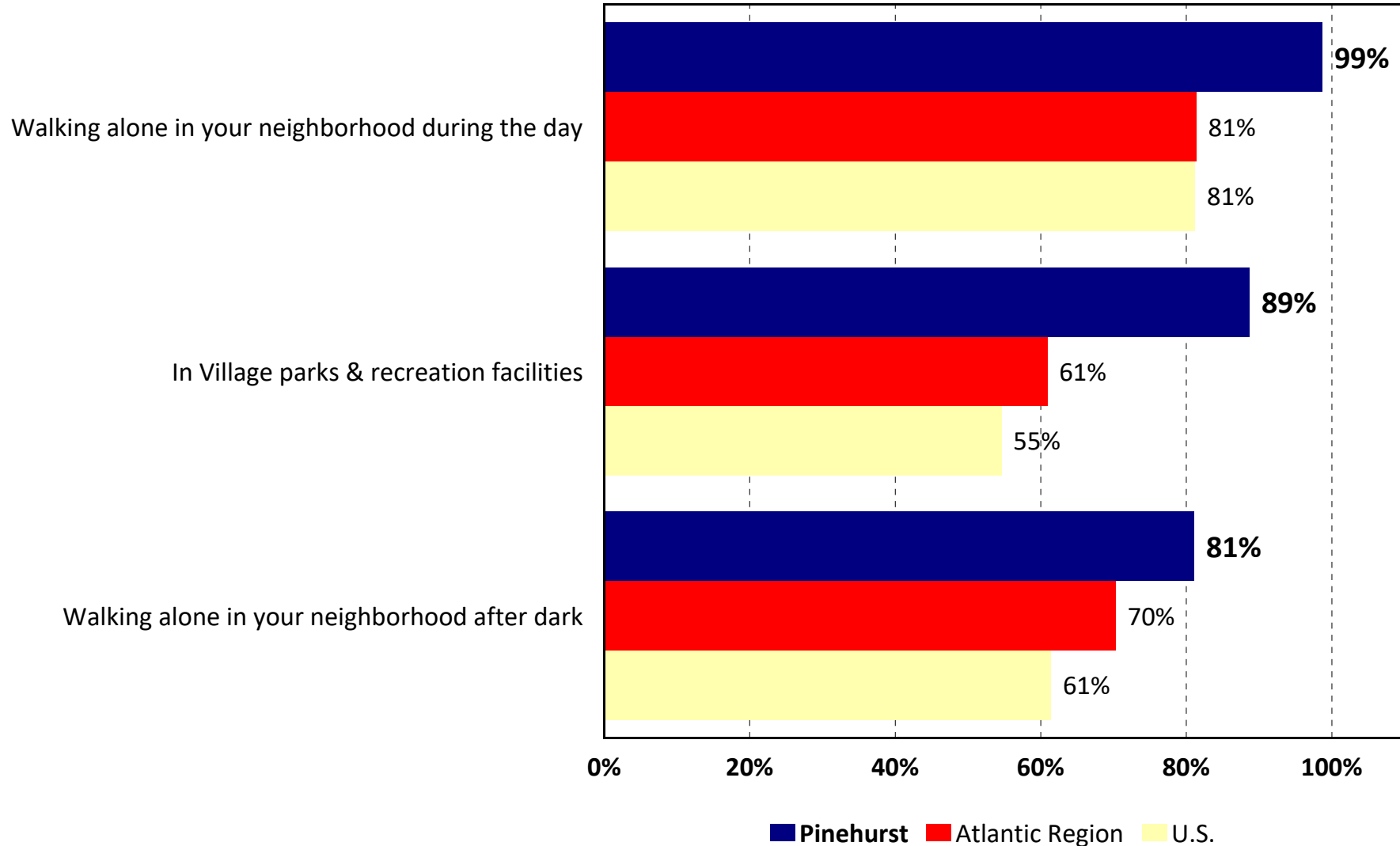
by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "excellent" and 1 was "poor" (excluding no opinion)



Overall Perceptions of Safety and Security

Pinehurst vs. Atlantic Region vs. the U.S.

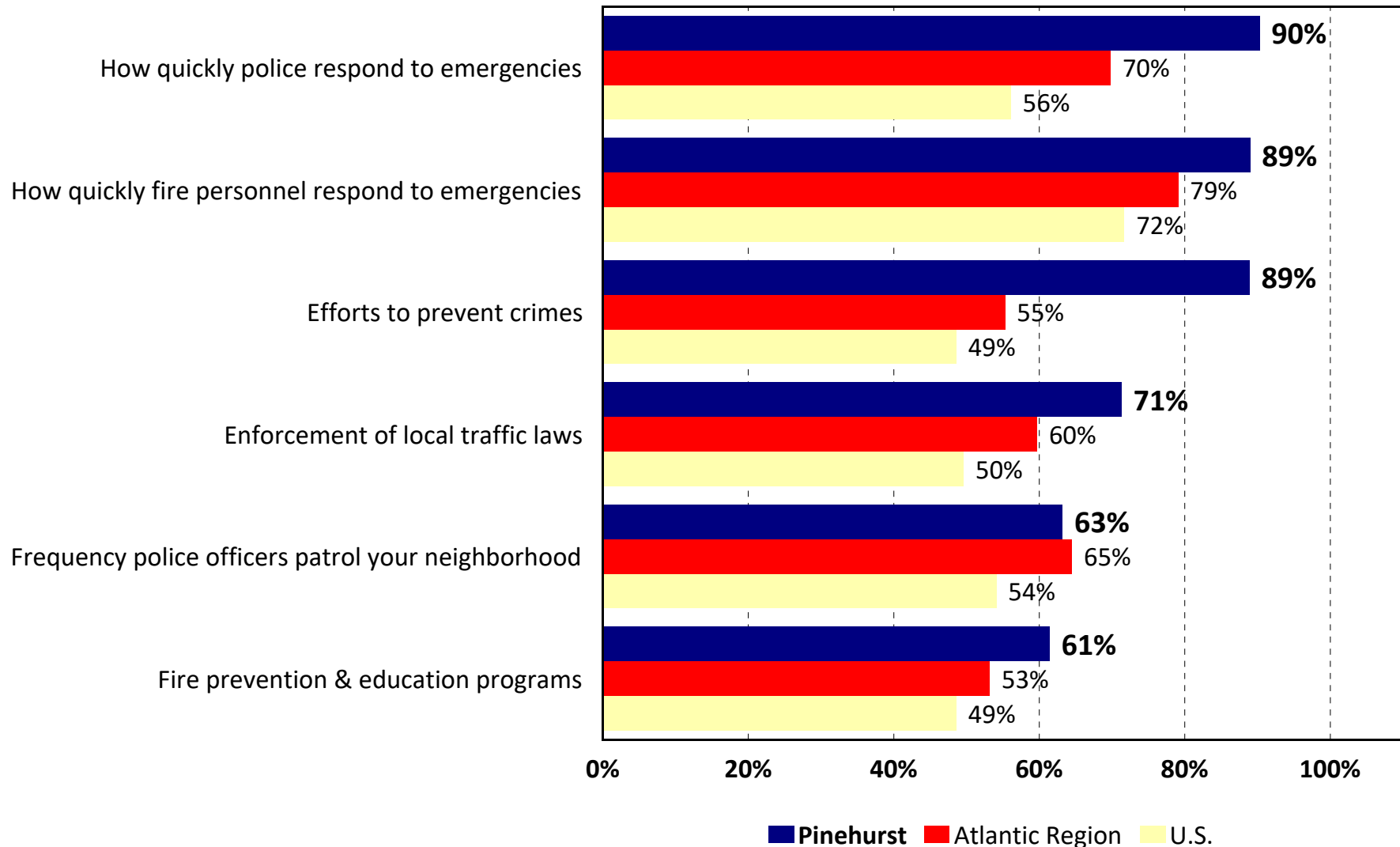
by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)



Overall Satisfaction with Public Safety Services

Pinehurst vs. Atlantic Region vs. the U.S.

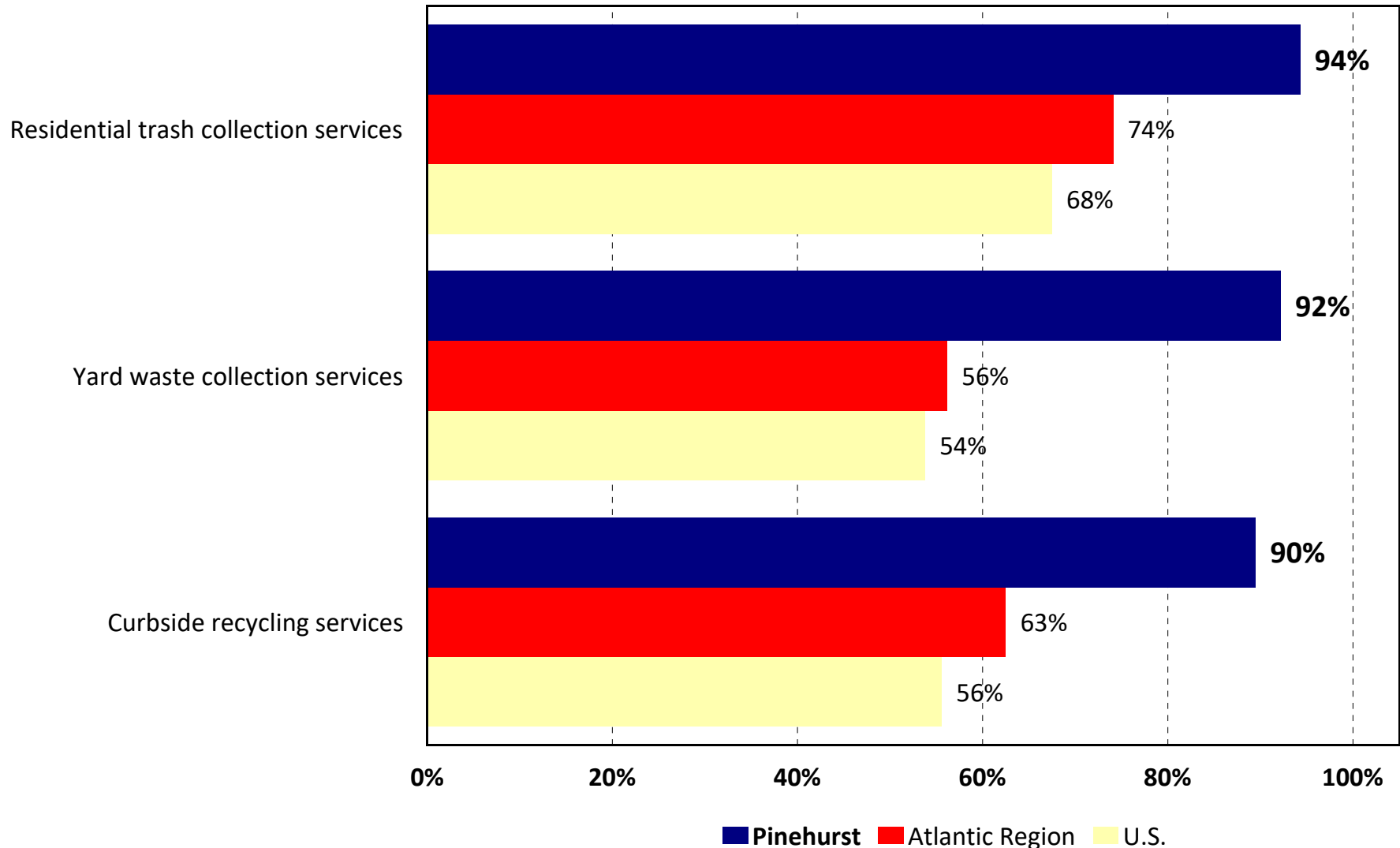
by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)



Overall Satisfaction with Solid Waste Services

Pinehurst vs. Atlantic Region vs. the U.S.

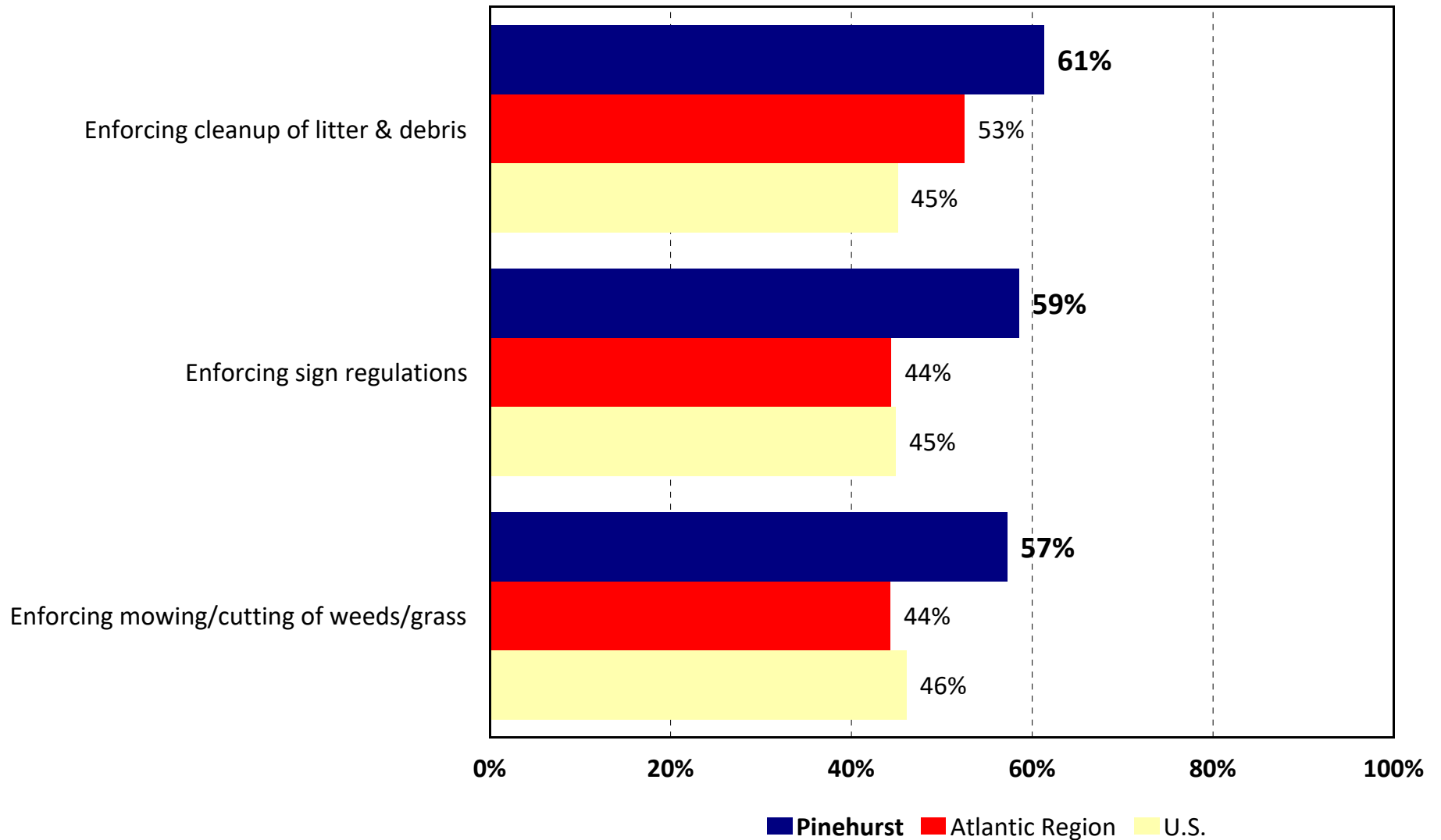
by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)



Overall Satisfaction with Code Enforcement

Pinehurst vs. Atlantic Region vs. the U.S.

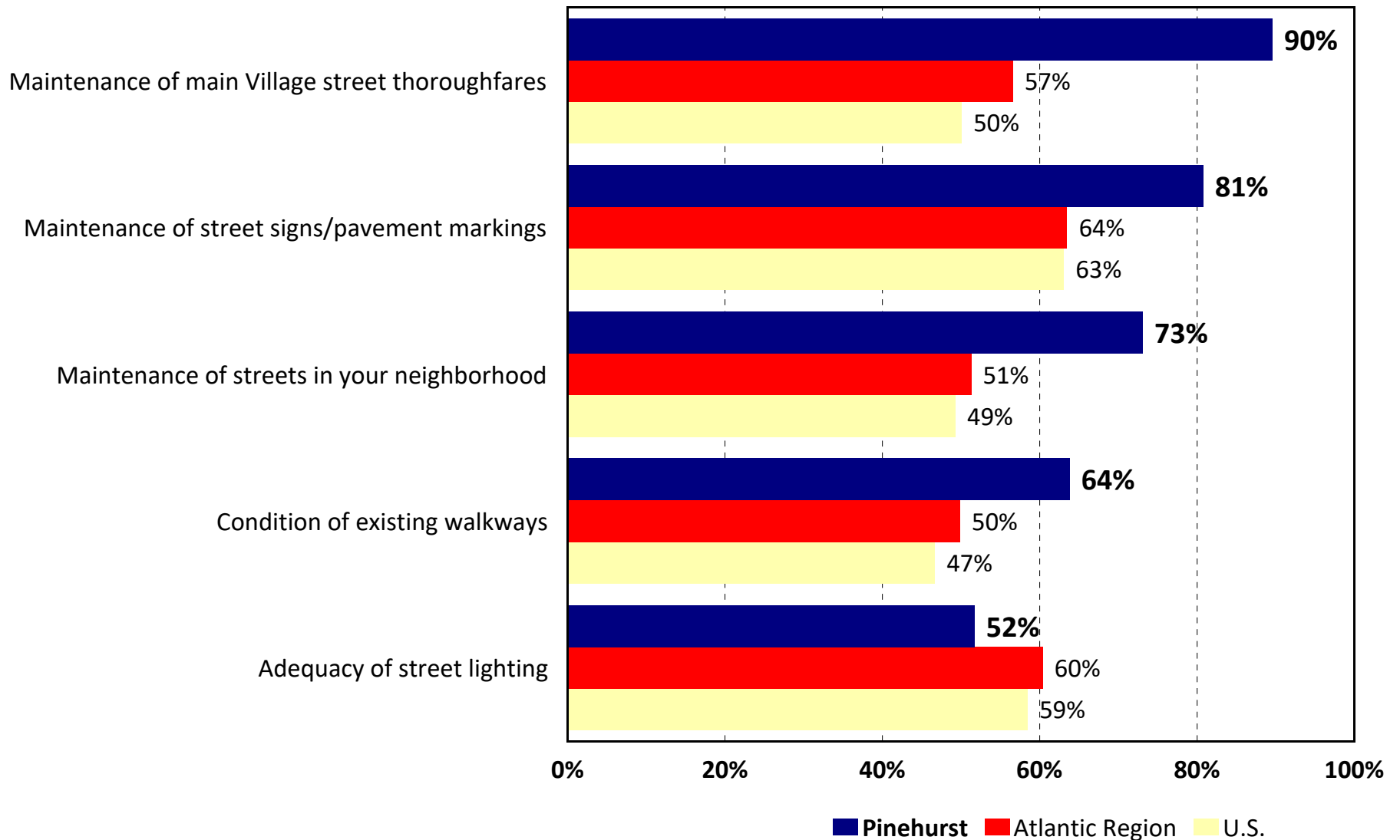
by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)



Overall Satisfaction with Transportation Services

Pinehurst vs. Atlantic Region vs. the U.S.

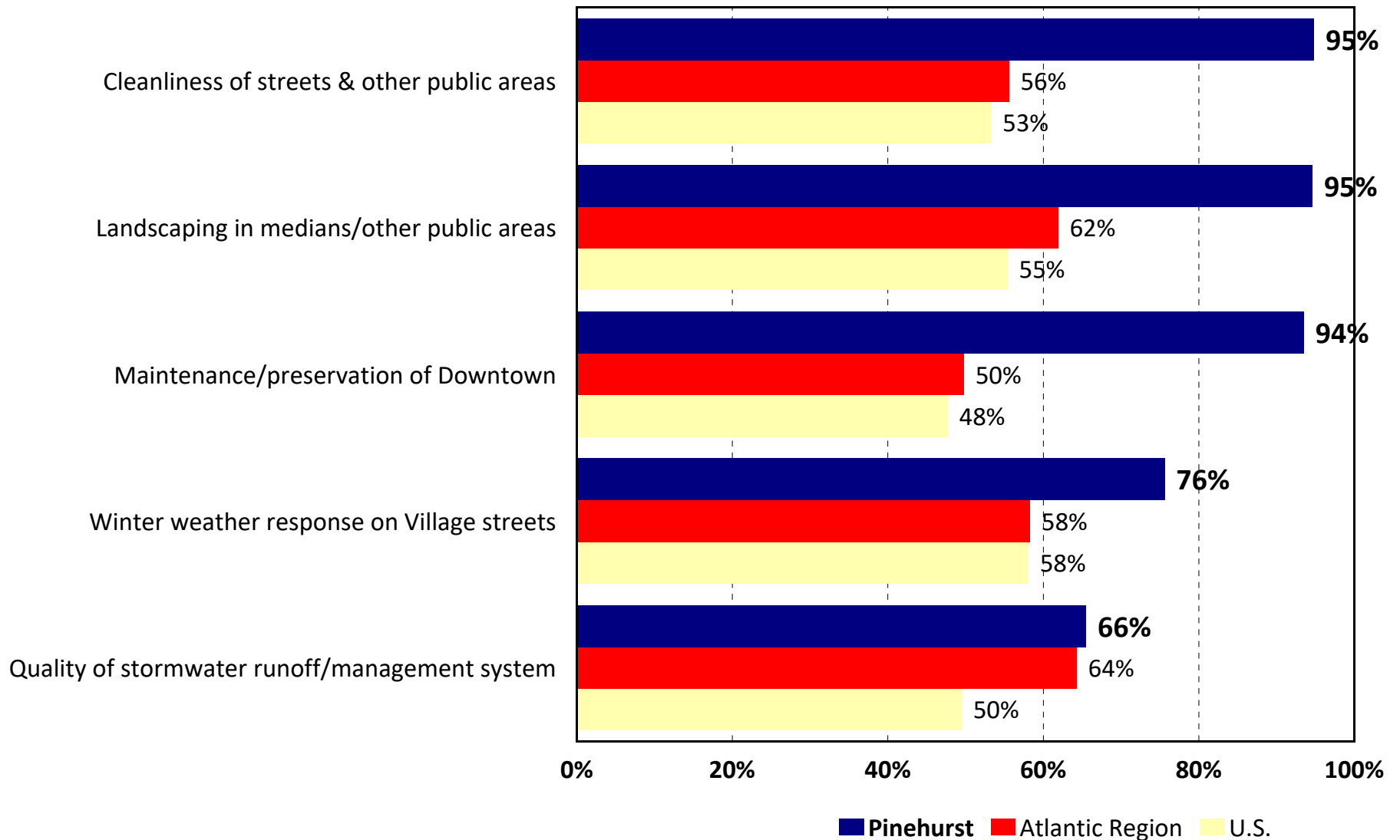
by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)



Overall Satisfaction with Public Services

Pinehurst vs. Atlantic Region vs. the U.S.

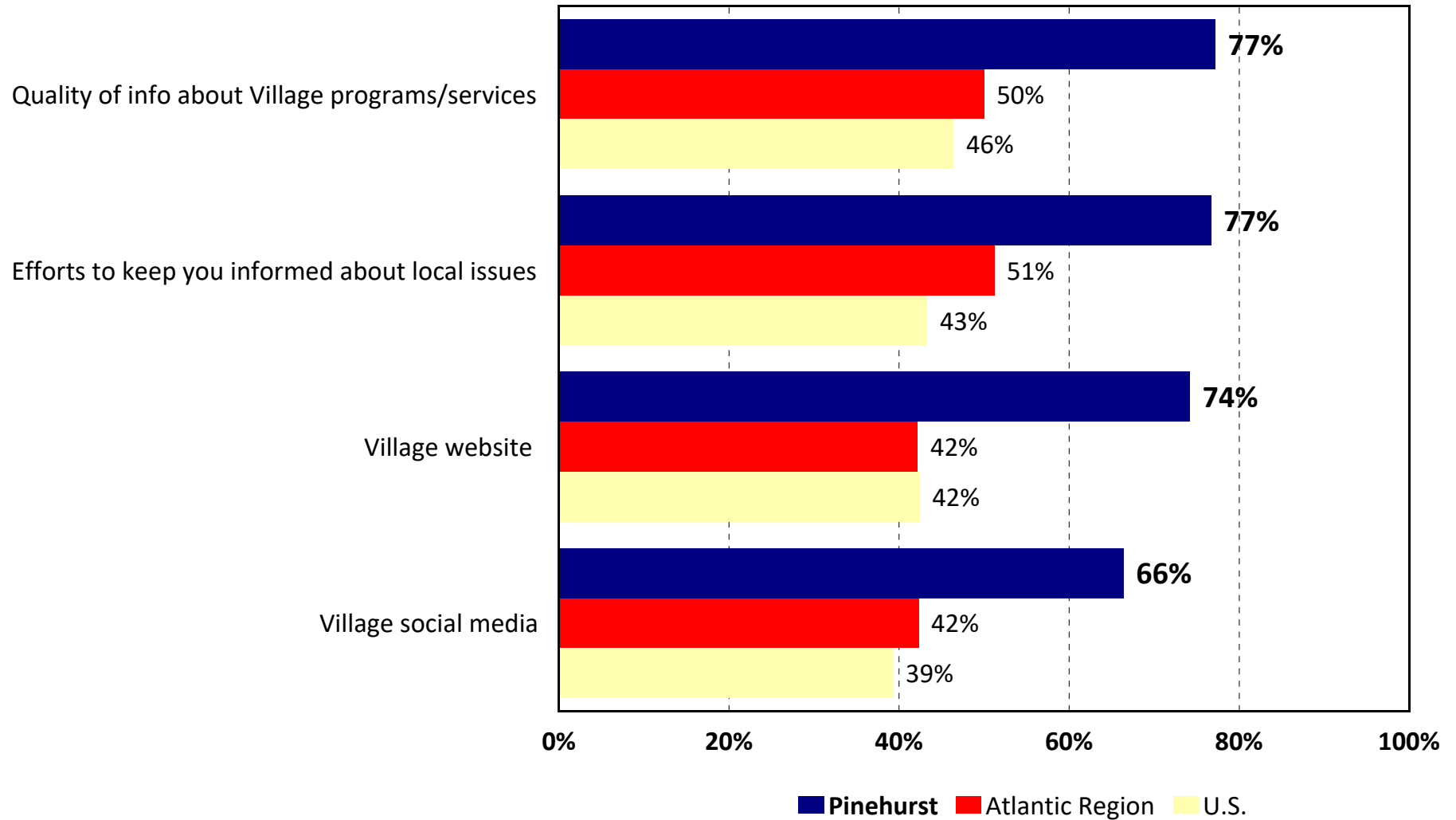
by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)



Overall Satisfaction with Communication

Pinehurst vs. Atlantic Region vs. the U.S.

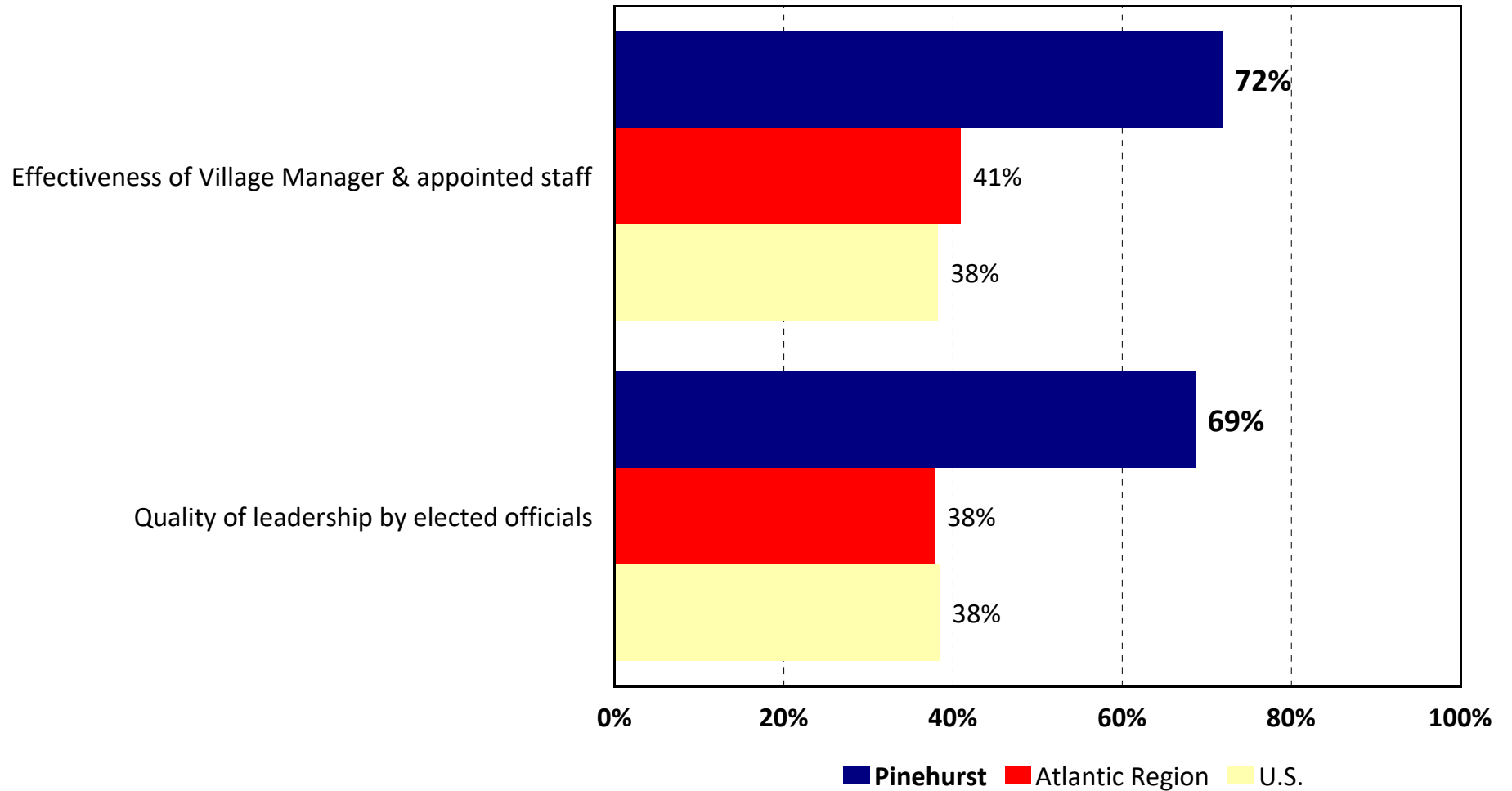
by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)



Overall Satisfaction with Village Leadership

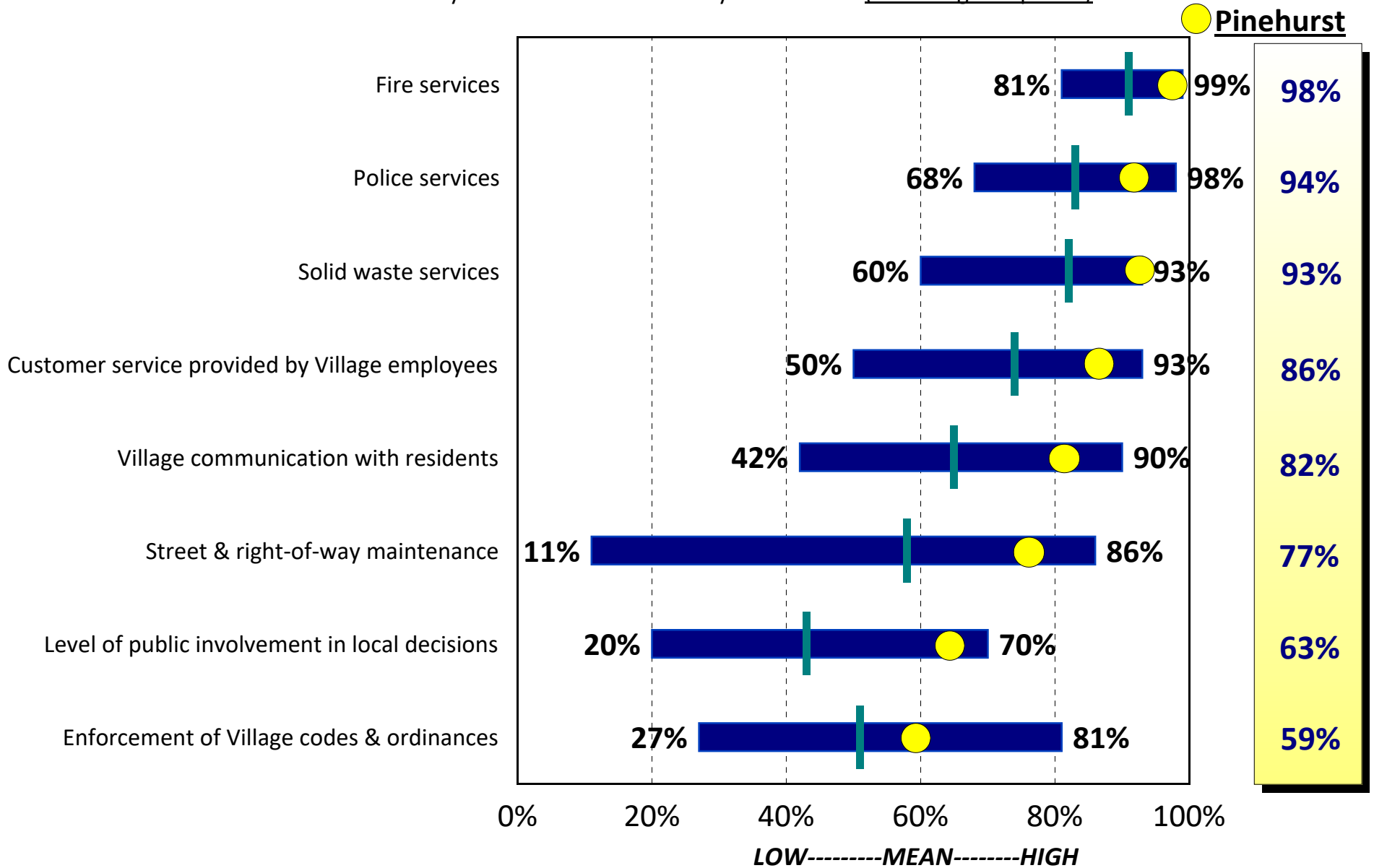
Pinehurst vs. Atlantic Region vs. the U.S.

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)



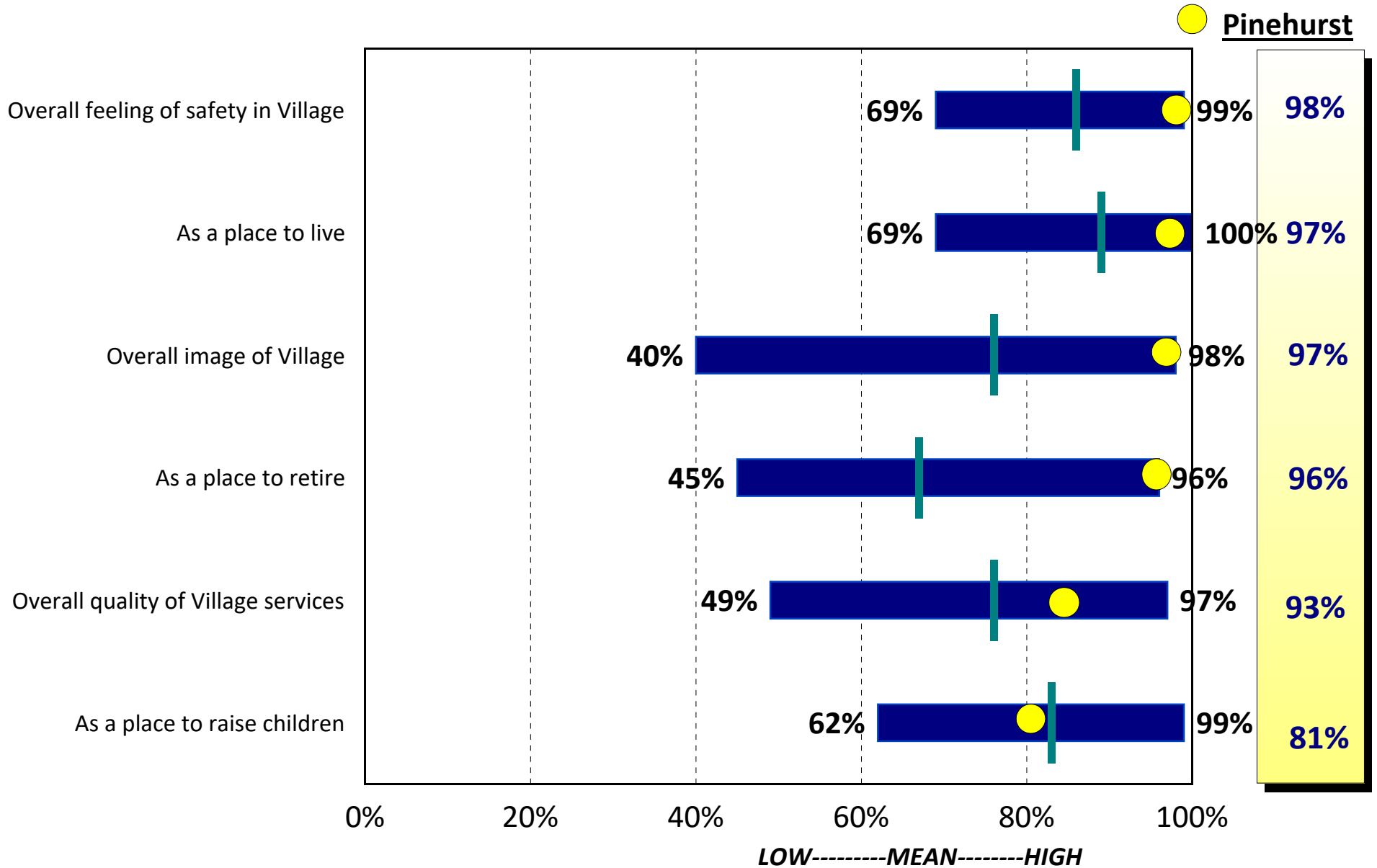
Overall Satisfaction with Various Village Services

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)



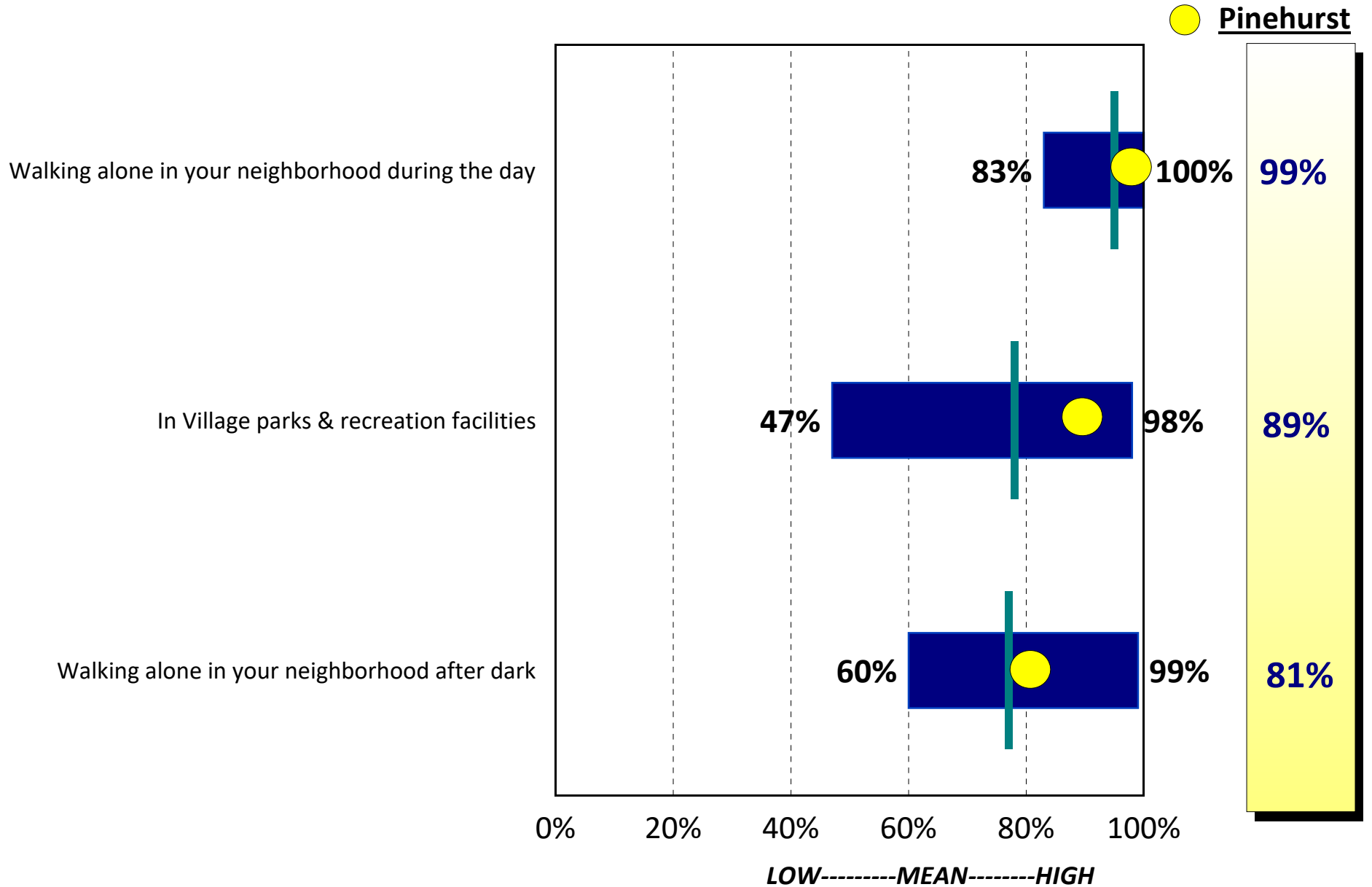
Overall Perceptions of the Village

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)



How Safe Residents Feel in Their Community

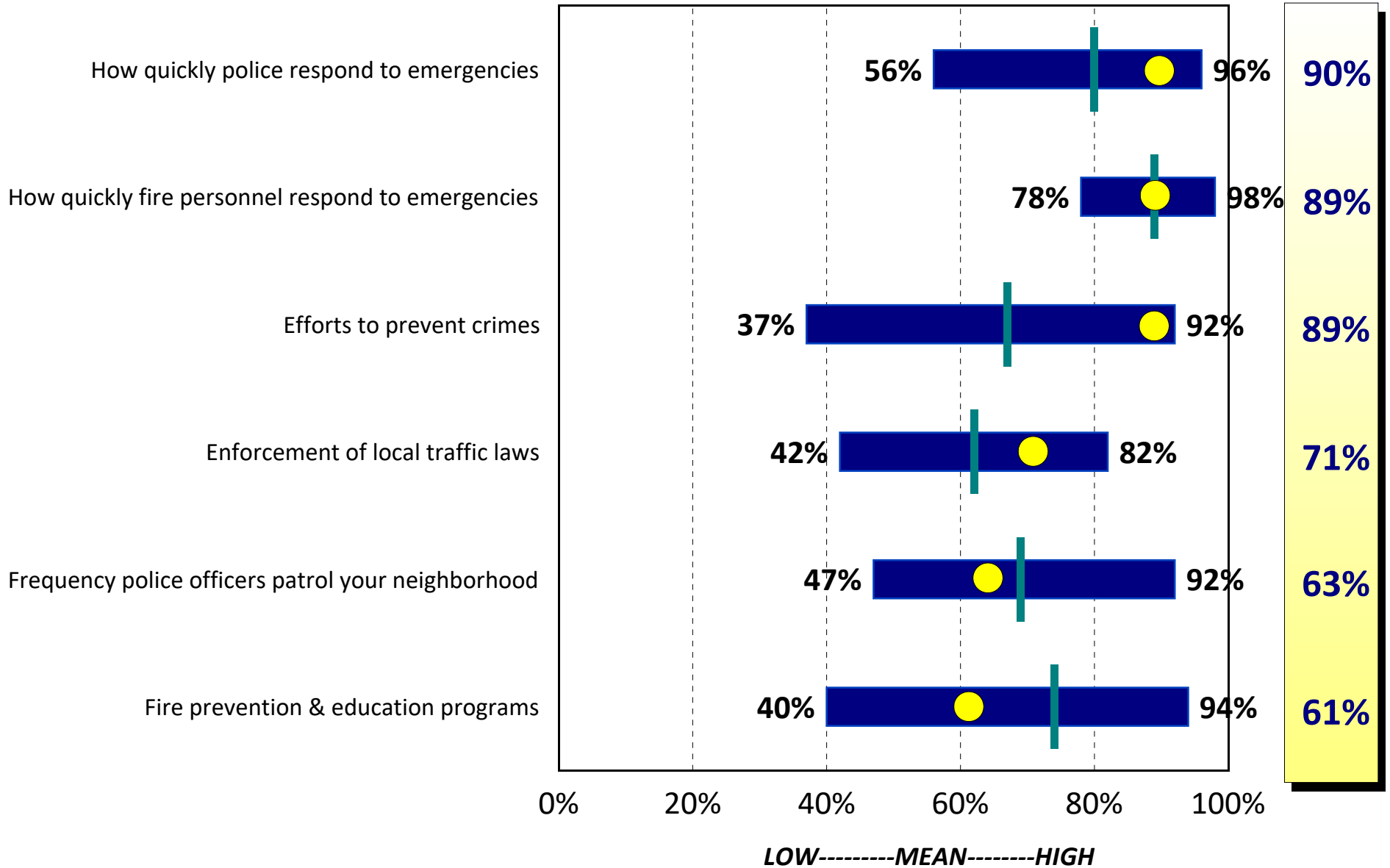
by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very safe" and 1 was "very unsafe" (excluding don't knows)



Satisfaction with Public Safety

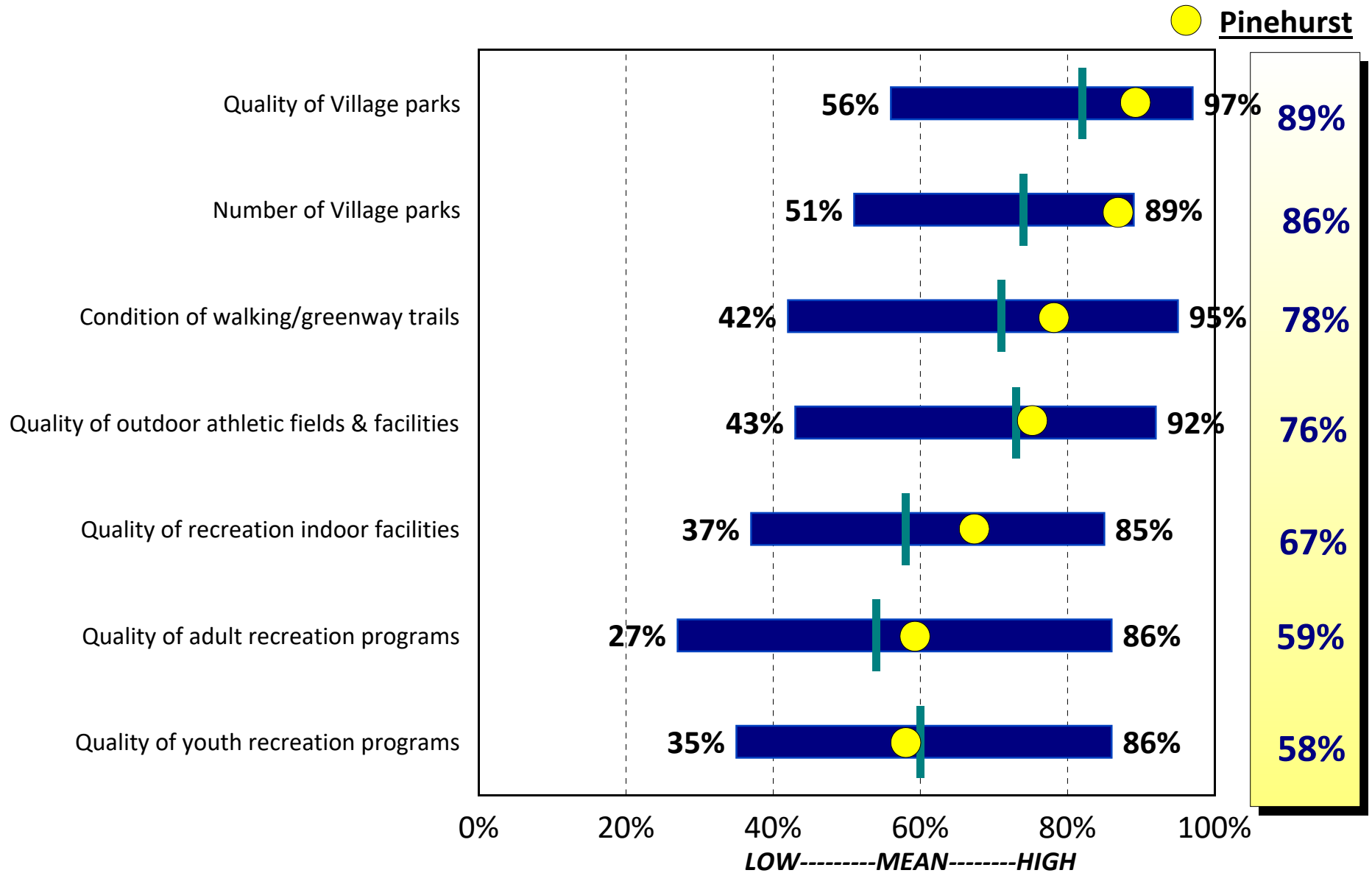
by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)

● **Pinehurst**



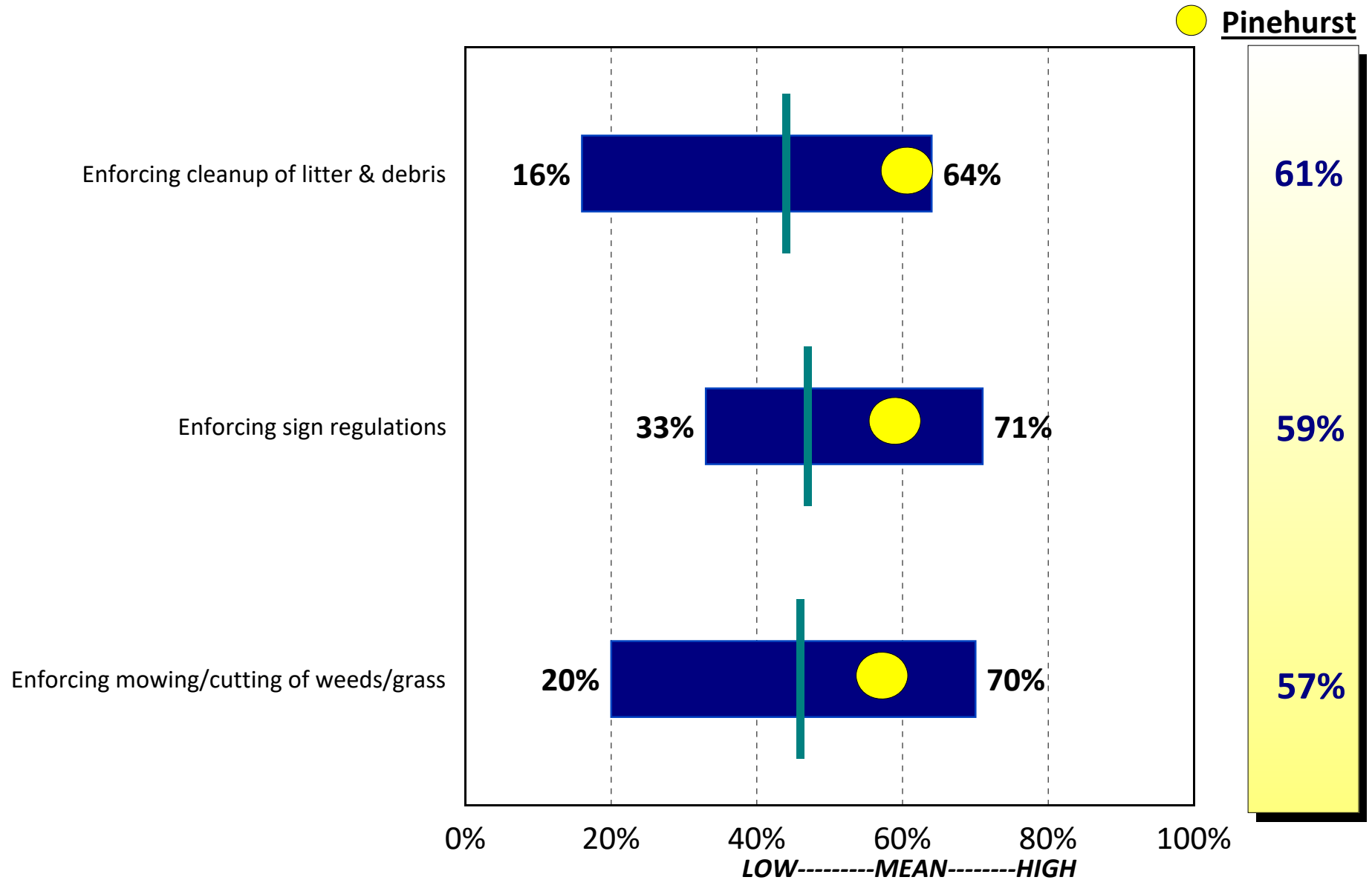
Overall Satisfaction with Cultural and Recreation Services

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)



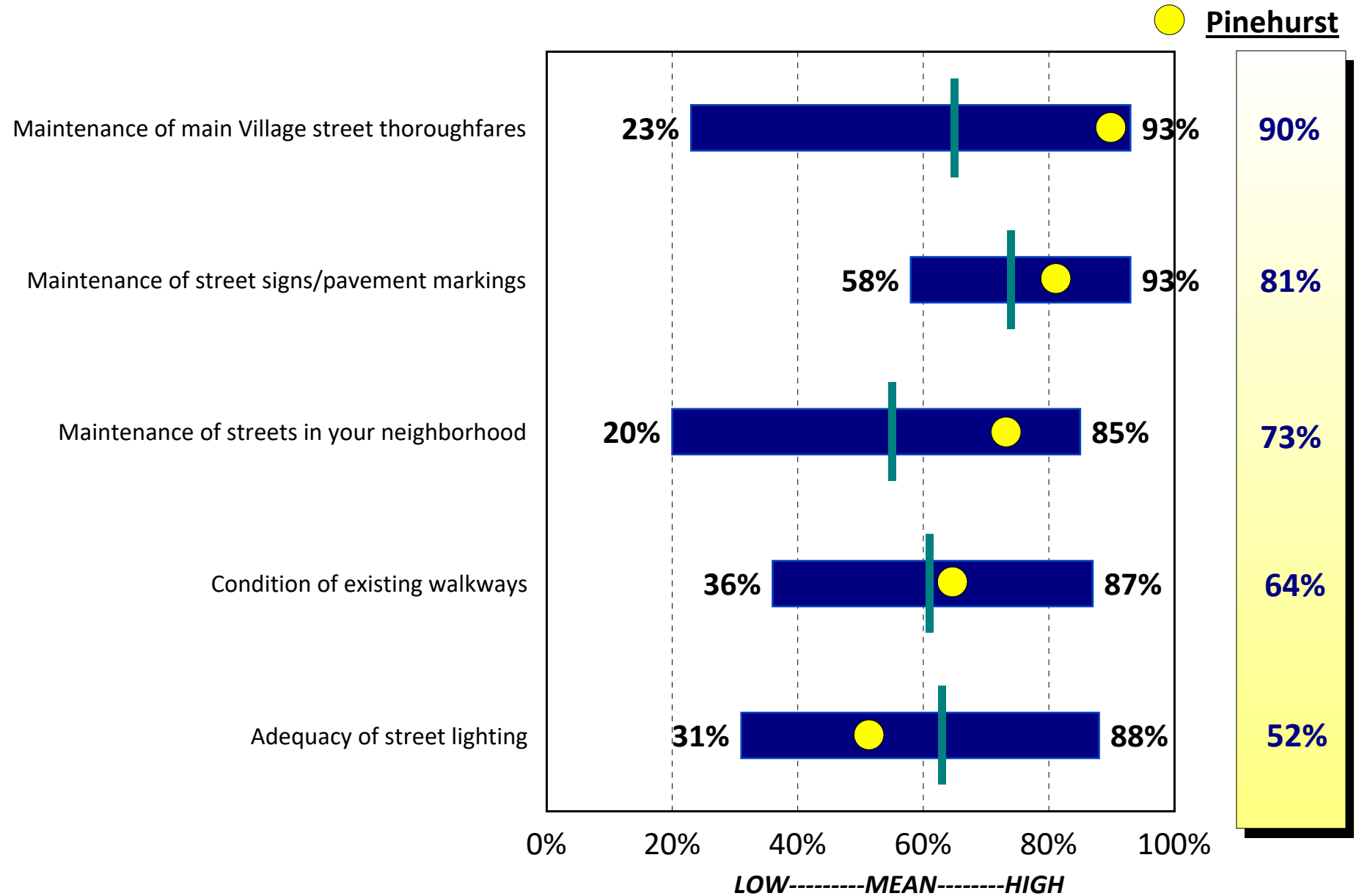
Overall Satisfaction with Code Enforcement

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)



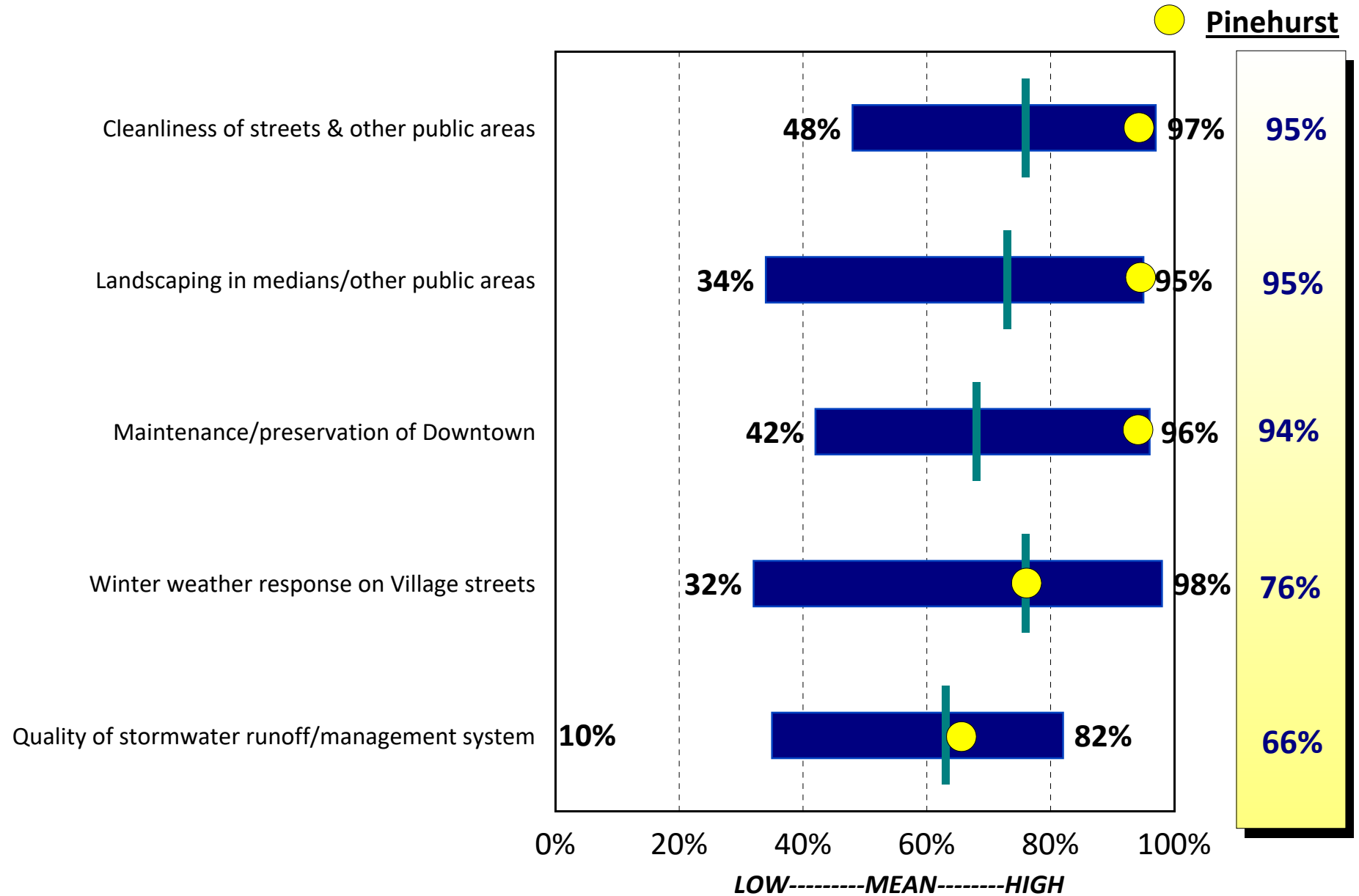
Overall Satisfaction with Transportation Services

by percentage of respondents who rated the item 4 or 5 on a 5-point scale
 where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)



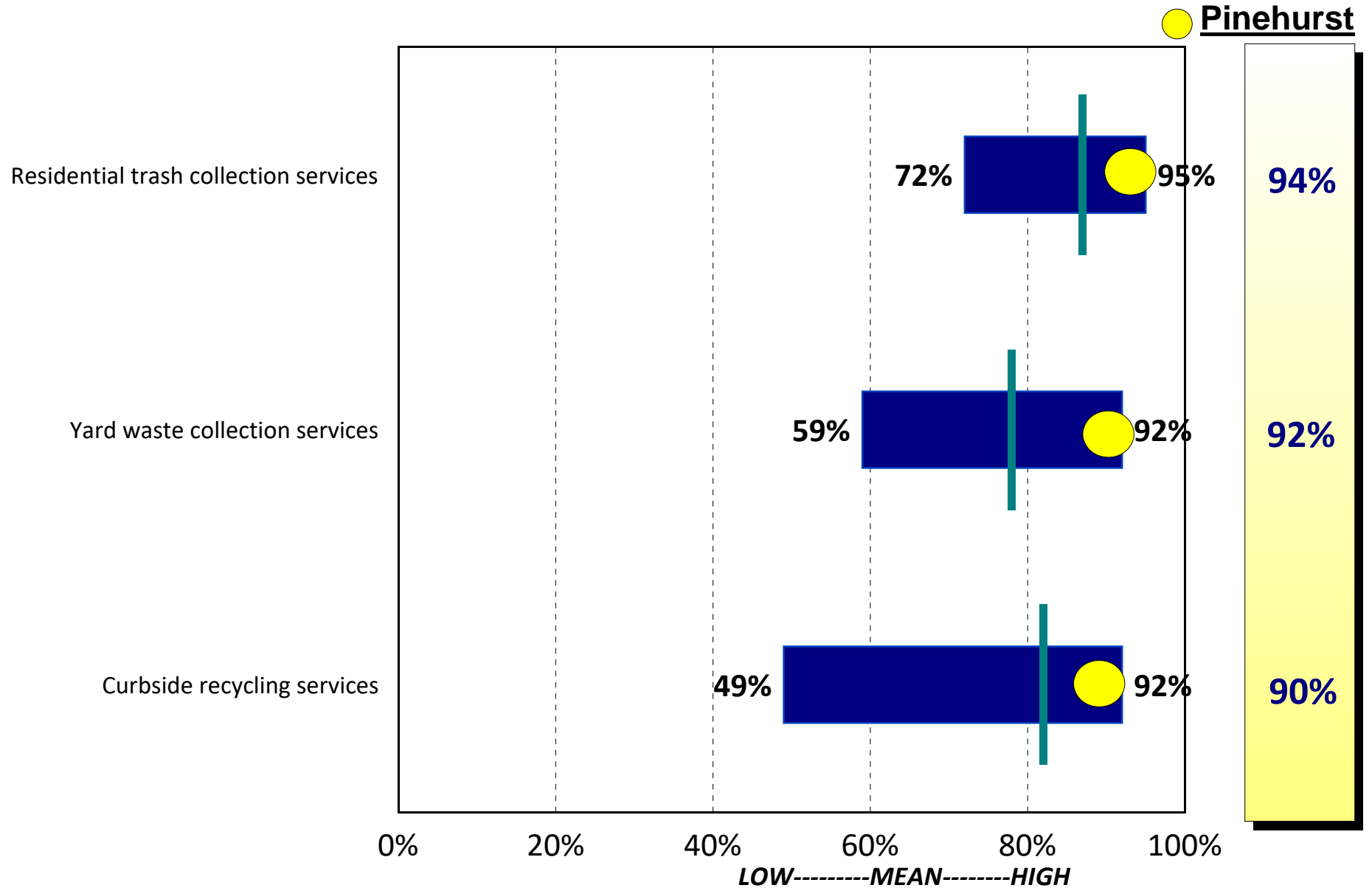
Overall Satisfaction with Public Services

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)



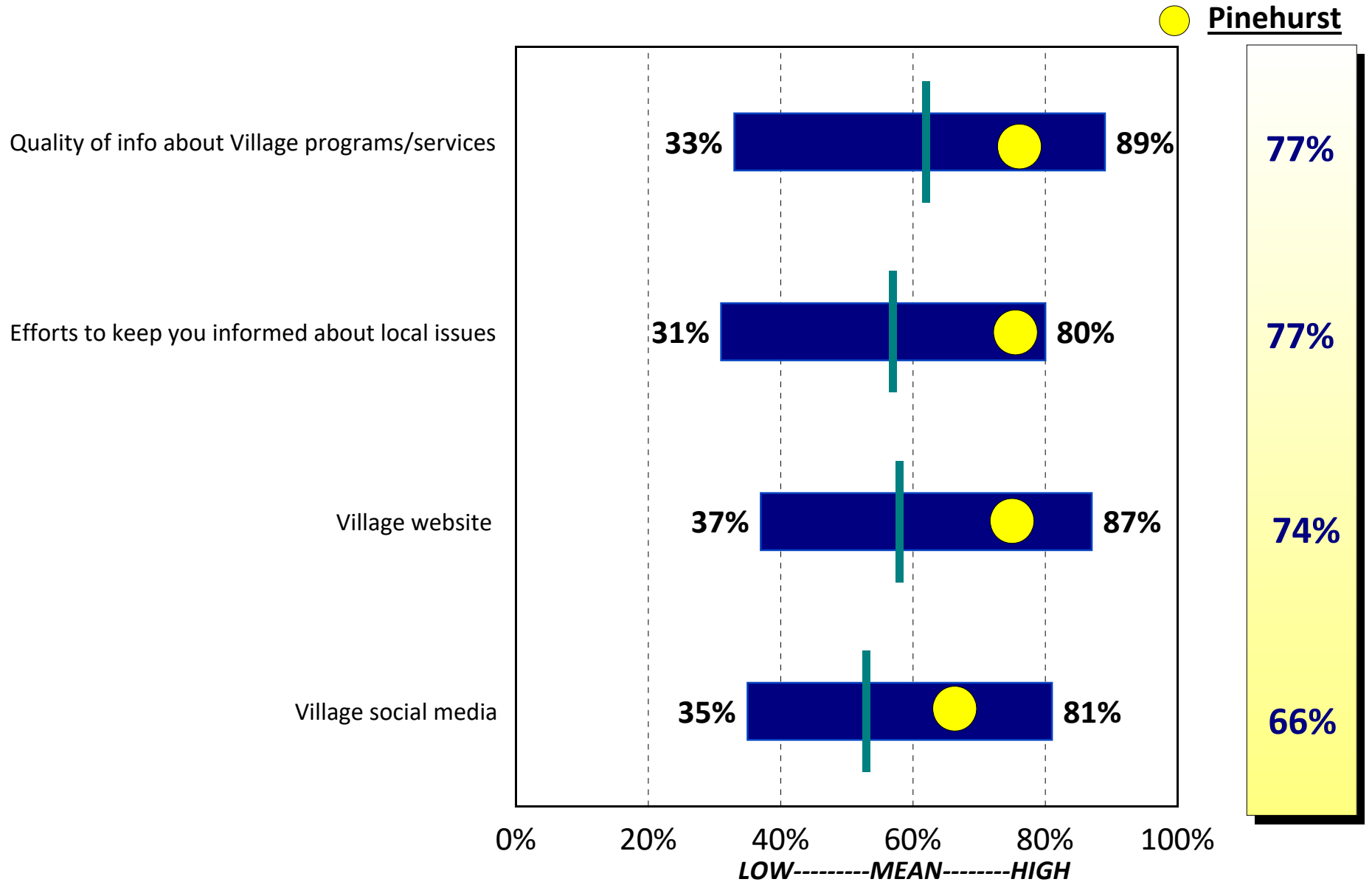
Overall Satisfaction with Solid Waste Services

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)



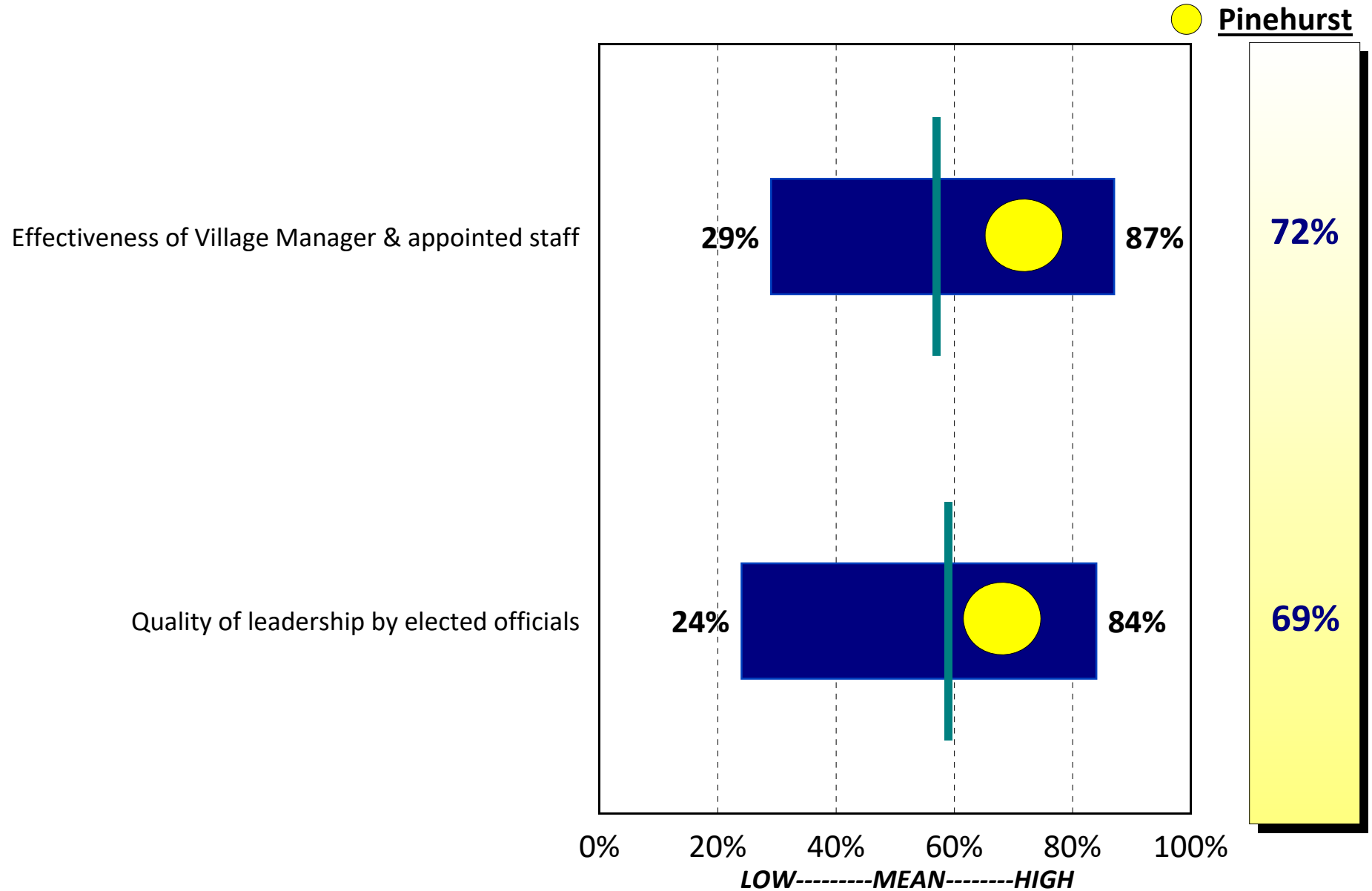
Overall Satisfaction with Public Communication and Outreach

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)



Overall Satisfaction with Village Leadership

by percentage of respondents who rated the item 4 or 5 on a 5-point scale where 5 was "very satisfied" and 1 was "very dissatisfied" (excluding no opinion)





3 Importance-Satisfaction Analysis

Importance-Satisfaction Analysis



Overview

Today, community leaders have limited resources which need to be targeted to activities that are of the most benefit to their citizens. Two of the most important criteria for decision making are (1) to target resources toward services of the highest importance to citizens; and (2) to target resources toward those services where citizens are the least satisfied.

The Importance-Satisfaction (I-S) 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 (I-S) 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.

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.

$$\text{I-S Rating} = \text{Importance} \times (1 - \text{Satisfaction})$$

Example of the Calculation

Respondents were asked to identify the overall categories of Village services that should receive the most emphasis over the next two years. Nearly one-third (31.8%) of the households selected "*enforcement of Village codes and ordinances*" as one of the most important services to emphasize over the next two years.

With regard to satisfaction, 58.7% of respondents surveyed rated "*enforcement of Village codes and ordinances*" 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 one minus the sum of the satisfaction percentages. In this example, 31.8% was multiplied by 41.3% (1-0.587). This calculation yielded an I-S rating of 0.1313, which ranked first out of thirteen categories of Village services analyzed.

Importance-Satisfaction Analysis



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 of importance and 0% indicate they are positively satisfied with the delivery of the service.

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

- If 100% of the respondents were positively satisfied with the delivery of the service
- If none (0%) of the respondents selected the service as one of the three most important areas.

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 (I-S > 0.20)
- Increase Current Emphasis (I-S = 0.10 - 0.20)
- Maintain Current Emphasis (I-S < 0.10)

The results for the Village of Pinehurst are provided on the following pages.

2024 Importance-Satisfaction Rating

Village of Pinehurst, North Carolina

Overall Satisfaction with Village Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS .10-.20)						
Enforcement of Village codes and ordinances	32%	3	59%	13	0.1313	1
Medium Priority (IS <.10)						
Level of public involvement in local decisions	26%	5	63%	12	0.0964	2
Efforts at maintaining quality of neighborhoods	34%	1	73%	10	0.0936	3
Street and right-of-way maintenance	34%	2	77%	8	0.0774	4
Promotion of natural resource conservation	18%	8	64%	11	0.0628	5
Library & archives services	13%	10	73%	9	0.0363	6
Village communication with residents	20%	6	82%	7	0.0357	7
Parks and recreation programs	13%	9	85%	6	0.0202	8
Police services	31%	4	94%	2	0.0194	9
Parks and recreation facilities	12%	11	89%	4	0.0131	10
Customer service provided by Village employees	5%	13	86%	5	0.0078	11
Solid waste services	10%	12	93%	3	0.0064	12
Fire services	18%	7	98%	1	0.0044	13

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 receive the most emphasis over the next two years.

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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2024 Importance-Satisfaction Rating

Village of Pinehurst, North Carolina

Overall Satisfaction with Public Safety Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS .10-.20)						
Frequency police officers patrol your neighborhood	29%	3	63%	5	0.1049	1
Medium Priority (IS <.10)						
Enforcement of local traffic laws	34%	2	71%	4	0.0967	2
Efforts to prevent crimes	55%	1	89%	3	0.0613	3
Fire prevention & education programs provided by the Village	11%	6	61%	6	0.0417	4
How quickly police respond to emergencies	27%	4	90%	1	0.0258	5
How quickly fire personnel respond to emergencies	19%	5	89%	2	0.0213	6

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 and second most important responses for each item. Respondents were asked to identify the items they thought should receive the most emphasis over the next two years.

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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2024 Importance-Satisfaction Rating

Village of Pinehurst, North Carolina

Overall Satisfaction with Cultural and Recreation Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Medium Priority (IS <.10)						
Variety of cultural arts events & programs in Southern Moore County	24%	4	70%	7	0.0729	1
Condition of walking/greenway trails	27%	1	78%	4	0.0603	2
Availability of recreation indoor facilities	13%	7	57%	14	0.0582	3
Quality of adult recreation programs	13%	8	59%	11	0.0543	4
Availability of information about recreation programs	15%	6	65%	10	0.0514	5
Availability of walking/greenway trails	26%	3	80%	3	0.0502	6
Variety of amenities in Village parks	18%	5	77%	5	0.0420	7
Quality of youth recreation programs	10%	10	58%	13	0.0420	8
Variety of amenities in recreation indoor facilities	9%	11	59%	12	0.0361	9
Quality of Village parks	26%	2	89%	1	0.0285	10
Quality of recreation indoor facilities	9%	12	67%	9	0.0284	11
Availability of outdoor athletic fields/facilities	6%	14	69%	8	0.0189	12
Quality of outdoor athletic fields & facilities	6%	13	76%	6	0.0154	13
Number of Village parks	10%	9	86%	2	0.0149	14

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 receive the most emphasis over the next two years.

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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2024 Importance-Satisfaction Rating

Village of Pinehurst, North Carolina

Overall Satisfaction with Transportation Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Very High Priority (IS > .20)						
Ease of travel on NC Highway 5	50%	1	24%	10	0.3843	1
Availability of walkways	33%	3	38%	9	0.2072	2
High Priority (IS .10-.20)						
Adequacy of street lighting	32%	4	45%	8	0.1793	3
Ease of travel through the large traffic circle	36%	2	52%	6	0.1695	4
Medium Priority (IS < .10)						
Maintenance of streets in your neighborhood	28%	5	74%	4	0.0733	5
Ease of golf cart travel	13%	8	47%	7	0.0714	6
Condition of existing walkways	16%	7	61%	5	0.0605	7
Maintenance of street signs/pavement markings	12%	9	76%	3	0.0298	8
Maintenance of main Village street thoroughfares	19%	6	90%	1	0.0202	9
Ease of travel on other streets in the Village	7%	10	80%	2	0.0148	10

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 receive the most emphasis over the next two years.

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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2024 Importance-Satisfaction Rating

Village of Pinehurst, North Carolina

Overall Satisfaction with Public Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS .10-.20)						
Quality of stormwater runoff/management system	42%	1	66%	5	0.1456	1
Medium Priority (IS <.10)						
Winter weather response on Village streets	20%	5	76%	4	0.0490	2
Maintenance/preservation of Downtown	37%	3	94%	3	0.0239	3
Cleanliness of streets & other public areas	39%	2	95%	1	0.0203	4
Landscaping in medians/other public areas	28%	4	95%	2	0.0150	5

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 and second most important responses for each item. Respondents were asked to identify the items they thought should receive the most emphasis over the next two years.

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).

The I-S (Importance-Satisfaction) matrix should be interpreted as follows.

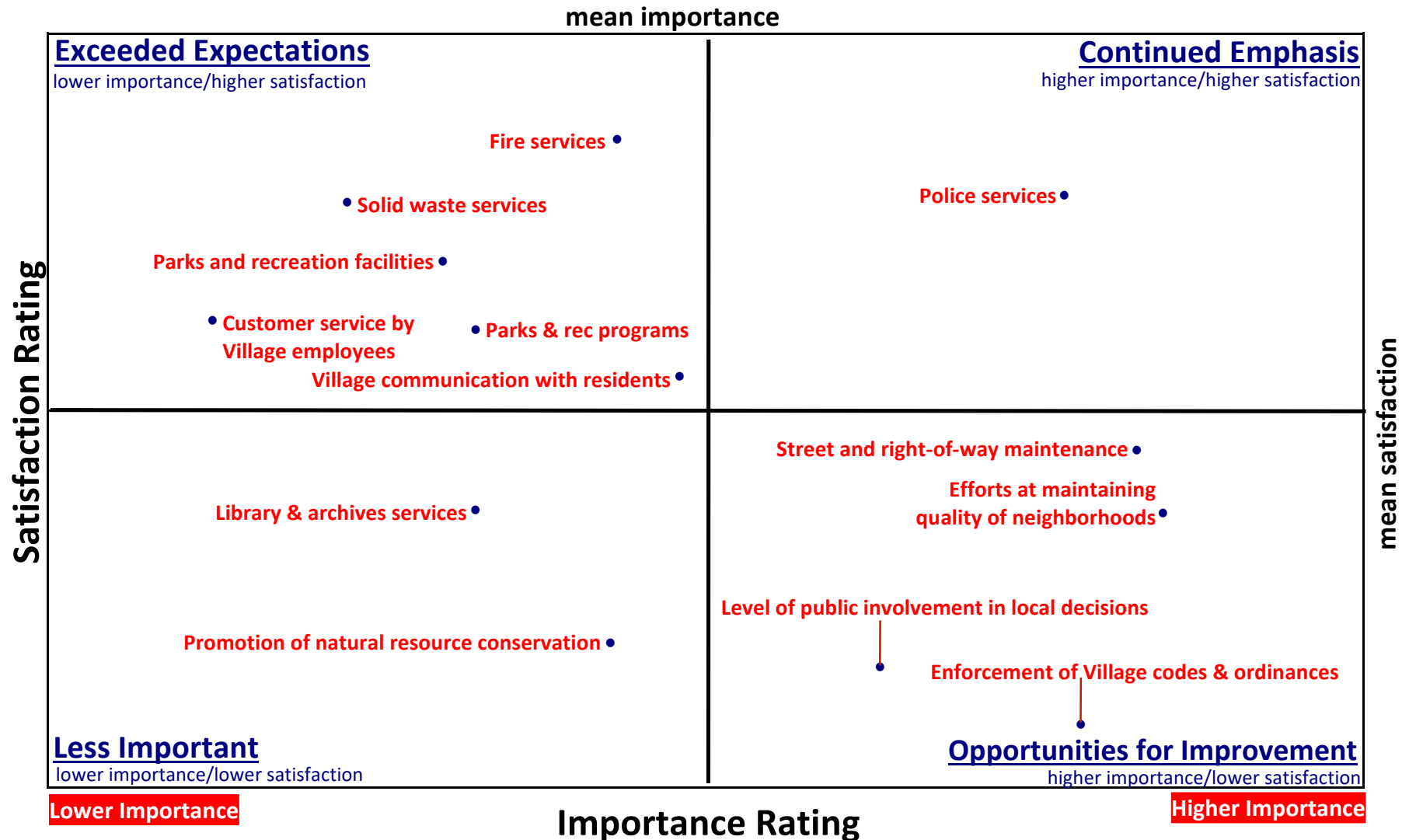
- **Continued Emphasis (above average importance and above average satisfaction).** This area shows where the City is meeting customer expectations. Items in this area have a significant impact on the customer's overall level of satisfaction. The City should maintain (or slightly increase) emphasis on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

Matrices showing the results for the City of Oklahoma City are provided on the following pages.

2024 Village of Pinehurst Community Survey Importance-Satisfaction Assessment Matrix

-Overall-

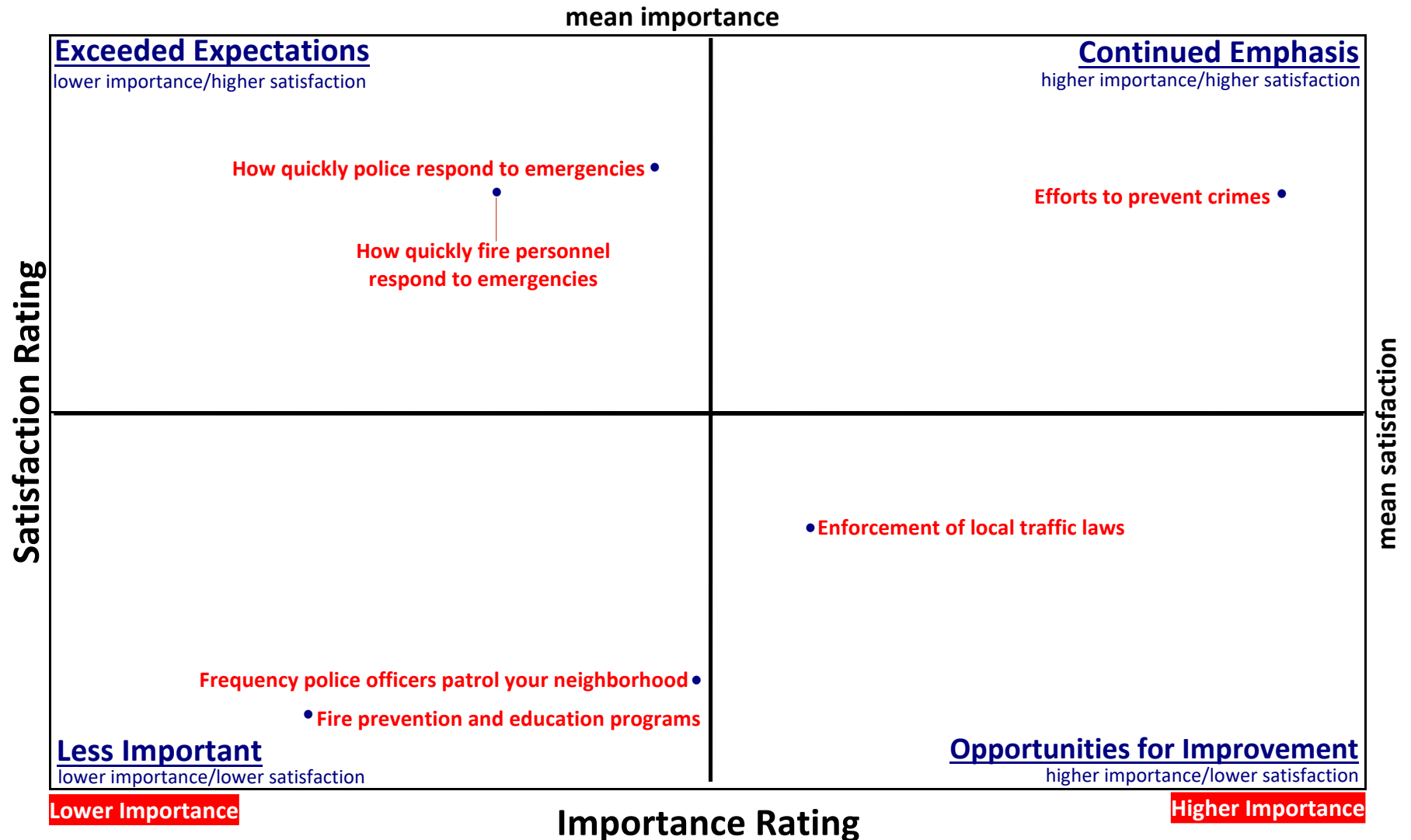
(points on the graph show deviations from the mean importance and satisfaction ratings given by respondents to the survey)



2024 Village of Pinehurst Community Survey Importance-Satisfaction Assessment Matrix

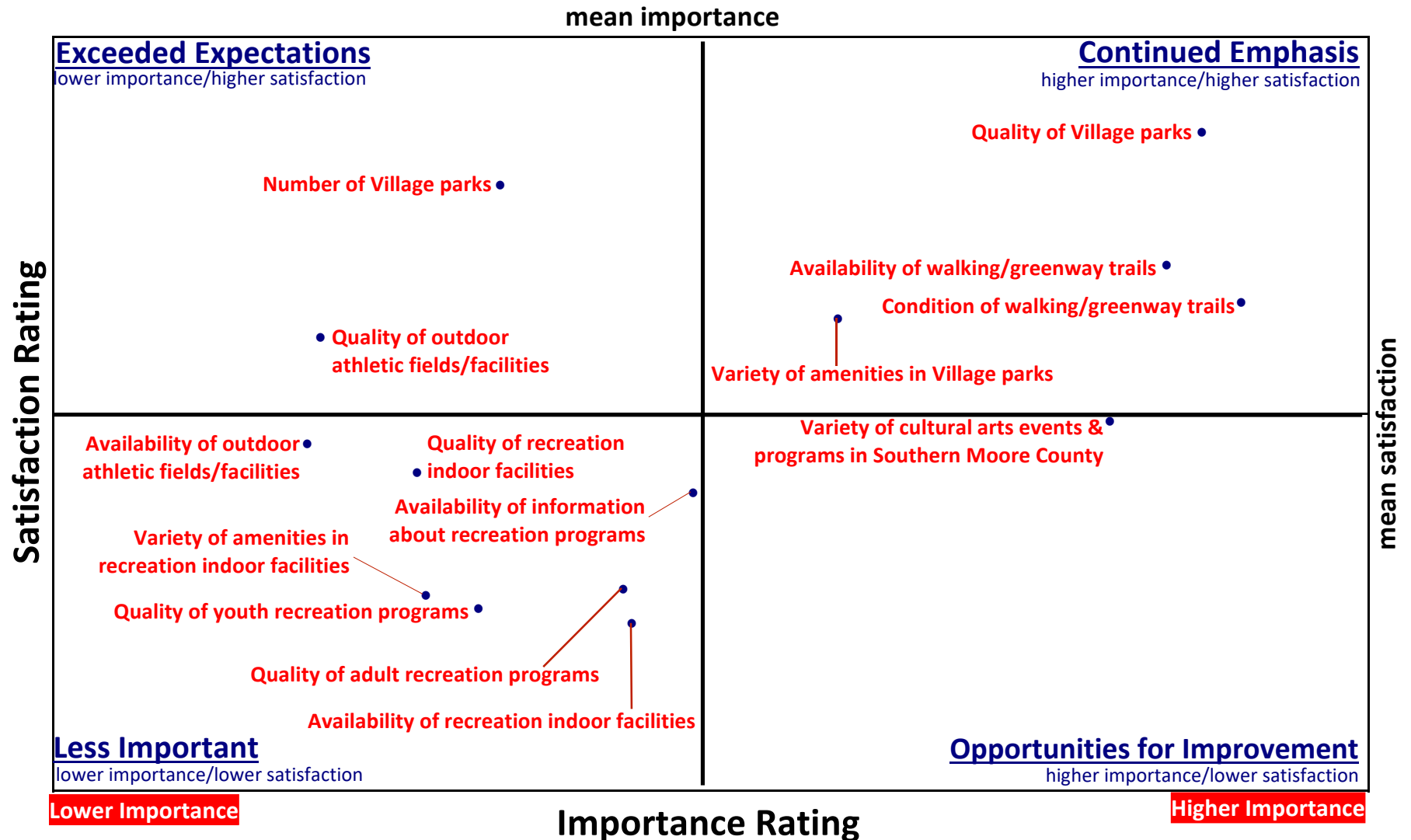
-Public Safety-

(points on the graph show deviations from the mean importance and satisfaction ratings given by respondents to the survey)



2024 Village of Pinehurst Community Survey Importance-Satisfaction Assessment Matrix -Cultural and Recreation Services-

(points on the graph show deviations from the mean importance and satisfaction ratings given by respondents to the survey)





4

Tabular Data

Q1. Overall Satisfaction with Village Services. Please rate your level of satisfaction with each of the following major categories of services provided by the Village of Pinehurst using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

(N=711)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	No opinion
Q1-1. Police services	57.5%	32.1%	4.1%	1.7%	0.1%	4.5%
Q1-2. Fire services	63.6%	24.8%	2.3%	0.0%	0.0%	9.4%
Q1-3. Parks & recreation programs	40.1%	30.1%	10.5%	1.8%	0.1%	17.3%
Q1-4. Parks & recreation facilities	44.7%	32.9%	7.9%	1.4%	0.0%	13.1%
Q1-5. Solid waste services	58.6%	31.8%	4.5%	1.5%	0.4%	3.1%
Q1-6. Street & right-of-way maintenance	33.8%	40.6%	14.9%	6.3%	1.1%	3.2%
Q1-7. Library & archives services	32.3%	25.3%	17.0%	2.7%	1.7%	21.0%
Q1-8. Enforcement of Village codes & ordinances	19.0%	32.6%	23.1%	9.8%	3.5%	12.0%
Q1-9. Customer service provided by Village employees	41.6%	31.8%	11.3%	0.7%	0.4%	14.2%
Q1-10. Village communication with residents	35.3%	43.0%	14.5%	2.5%	0.4%	4.2%
Q1-11. Village efforts at maintaining quality of your neighborhood	30.1%	39.4%	16.9%	7.7%	1.4%	4.5%
Q1-12. Promotion of natural resource conservation	23.1%	30.1%	24.2%	4.4%	1.1%	17.2%
Q1-13. Level of public involvement in local decisions	20.8%	36.0%	25.6%	6.6%	1.8%	9.1%

WITHOUT "NO OPINION"

Q1. Overall Satisfaction with Village Services. Please rate your level of satisfaction with each of the following major categories of services provided by the Village of Pinehurst using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied." (without "no opinion")

(N=711)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q1-1. Police services	60.2%	33.6%	4.3%	1.8%	0.1%
Q1-2. Fire services	70.2%	27.3%	2.5%	0.0%	0.0%
Q1-3. Parks & recreation programs	48.5%	36.4%	12.8%	2.2%	0.2%
Q1-4. Parks & recreation facilities	51.5%	37.9%	9.1%	1.6%	0.0%
Q1-5. Solid waste services	60.5%	32.8%	4.6%	1.6%	0.4%
Q1-6. Street & right-of-way maintenance	34.9%	42.0%	15.4%	6.5%	1.2%
Q1-7. Library & archives services	40.9%	32.0%	21.5%	3.4%	2.1%
Q1-8. Enforcement of Village codes & ordinances	21.6%	37.1%	26.2%	11.2%	4.0%
Q1-9. Customer service provided by Village employees	48.5%	37.0%	13.1%	0.8%	0.5%
Q1-10. Village communication with residents	36.9%	44.9%	15.1%	2.6%	0.4%
Q1-11. Village efforts at maintaining quality of your neighborhood	31.5%	41.2%	17.7%	8.1%	1.5%
Q1-12. Promotion of natural resource conservation	27.8%	36.3%	29.2%	5.3%	1.4%
Q1-13. Level of public involvement in local decisions	22.9%	39.6%	28.2%	7.3%	2.0%

Q2. From the list of items in Question 1, which THREE of the major categories of Village services do you think should receive the MOST EMPHASIS from Village leaders over the next TWO years?

<u>Q2. Top choice</u>	<u>Number</u>	<u>Percent</u>
Police services	154	21.7 %
Fire services	15	2.1 %
Parks & recreation programs	26	3.7 %
Parks & recreation facilities	29	4.1 %
Solid waste services	14	2.0 %
Street & right-of-way maintenance	93	13.1 %
Library & archives services	47	6.6 %
Enforcement of Village codes & ordinances	84	11.8 %
Customer service provided by Village employees	10	1.4 %
Village communication with residents	28	3.9 %
Village efforts at maintaining quality of your neighborhoods	67	9.4 %
Promotion of natural resource conservation	32	4.5 %
Level of public involvement in local decisions	51	7.2 %
None chosen	61	8.6 %
Total	711	100.0 %

Q2. From the list of items in Question 1, which THREE of the major categories of Village services do you think should receive the MOST EMPHASIS from Village leaders over the next TWO years?

<u>Q2. 2nd choice</u>	<u>Number</u>	<u>Percent</u>
Police services	37	5.2 %
Fire services	87	12.2 %
Parks & recreation programs	38	5.3 %
Parks & recreation facilities	29	4.1 %
Solid waste services	17	2.4 %
Street & right-of-way maintenance	74	10.4 %
Library & archives services	22	3.1 %
Enforcement of Village codes & ordinances	78	11.0 %
Customer service provided by Village employees	9	1.3 %
Village communication with residents	60	8.4 %
Village efforts at maintaining quality of your neighborhoods	88	12.4 %
Promotion of natural resource conservation	46	6.5 %
Level of public involvement in local decisions	48	6.8 %
None chosen	78	11.0 %
Total	711	100.0 %

Q2. From the list of items in Question 1, which THREE of the major categories of Village services do you think should receive the MOST EMPHASIS from Village leaders over the next TWO years?

<u>Q2. 3rd choice</u>	<u>Number</u>	<u>Percent</u>
Police services	31	4.4 %
Fire services	24	3.4 %
Parks & recreation programs	31	4.4 %
Parks & recreation facilities	30	4.2 %
Solid waste services	36	5.1 %
Street & right-of-way maintenance	71	10.0 %
Library & archives services	26	3.7 %
Enforcement of Village codes & ordinances	64	9.0 %
Customer service provided by Village employees	19	2.7 %
Village communication with residents	52	7.3 %
Village efforts at maintaining quality of your neighborhoods	89	12.5 %
Promotion of natural resource conservation	46	6.5 %
Level of public involvement in local decisions	83	11.7 %
None chosen	109	15.3 %
Total	711	100.0 %

SUM OF TOP 3 CHOICES

Q2. From the list of items in Question 1, which THREE of the major categories of Village services do you think should receive the MOST EMPHASIS from Village leaders over the next TWO years? (top 3)

<u>Q2. Sum of top 3 choices</u>	<u>Number</u>	<u>Percent</u>
Police services	222	31.2 %
Fire services	126	17.7 %
Parks & recreation programs	95	13.4 %
Parks & recreation facilities	88	12.4 %
Solid waste services	67	9.4 %
Street & right-of-way maintenance	238	33.5 %
Library & archives services	95	13.4 %
Enforcement of Village codes & ordinances	226	31.8 %
Customer service provided by Village employees	38	5.3 %
Village communication with residents	140	19.7 %
Village efforts at maintaining quality of your neighborhoods	244	34.3 %
Promotion of natural resource conservation	124	17.4 %
Level of public involvement in local decisions	182	25.6 %
None chosen	61	8.6 %
Total	1946	

Q3. Reasons to Stay in Pinehurst. Several reasons to consider residing in the Village of Pinehurst are listed below. On a scale from 1 to 4, where 4 is "Very Important" and 1 is "Unimportant," please rate how important each reason is in your decision to stay where you live.

(N=711)

	Very important	Somewhat important	Not sure	Unimportant
Q3-1. Sense of community	66.5%	26.3%	5.1%	2.1%
Q3-2. Quality of public education	56.1%	20.0%	15.0%	8.9%
Q3-3. Types of housing	62.3%	27.0%	8.0%	2.7%
Q3-4. Quality of housing	75.7%	17.3%	5.9%	1.1%
Q3-5. Access to quality shopping	42.2%	41.9%	7.2%	8.7%
Q3-6. Availability of cultural arts opportunities	38.5%	39.9%	13.9%	7.6%
Q3-7. Availability of golfing opportunities	42.6%	24.3%	9.0%	24.1%
Q3-8. Availability of other recreational opportunities	40.2%	42.3%	11.1%	6.3%
Q3-9. Proximity to family or friends	33.6%	35.4%	13.9%	17.0%
Q3-10. Proximity to work	19.4%	20.0%	15.5%	45.1%
Q3-11. Safety & security	92.7%	4.9%	2.0%	0.4%
Q3-12. Quality health care	89.5%	7.5%	2.8%	0.3%
Q3-13. Opportunities and/or resources for senior citizens	54.4%	28.1%	9.3%	8.2%
Q3-14. Opportunities and/or resources for children under 18	34.0%	25.3%	18.7%	21.9%
Q3-15. Low property tax rate	68.6%	23.6%	5.3%	2.4%
Q3-16. Historic landmark designation	39.2%	29.4%	12.9%	18.4%

Q3. Then, please indicate if your needs are being met in Pinehurst.

(N=711)

	Yes	No	Not provided
Q3-1. Sense of community	70.5%	6.0%	23.5%
Q3-2. Quality of public education	50.8%	12.8%	36.4%
Q3-3. Types of housing	65.1%	7.5%	27.4%
Q3-4. Quality of housing	65.4%	8.3%	26.3%
Q3-5. Access to quality shopping	57.5%	17.3%	25.2%
Q3-6. Availability of cultural arts opportunities	60.1%	11.0%	29.0%
Q3-7. Availability of golfing opportunities	64.7%	4.6%	30.7%
Q3-8. Availability of other recreational opportunities	56.4%	13.2%	30.4%
Q3-9. Proximity to family or friends	58.9%	9.7%	31.4%
Q3-10. Proximity to work	47.5%	10.3%	42.2%
Q3-11. Safety & security	72.9%	2.1%	25.0%
Q3-12. Quality health care	69.1%	5.3%	25.6%
Q3-13. Opportunities and/or resources for senior citizens	61.3%	6.9%	31.8%
Q3-14. Opportunities and/or resources for children under 18	41.6%	16.3%	42.1%
Q3-15. Low property tax rate	62.4%	9.1%	28.4%
Q3-16. Historic landmark designation	57.4%	6.2%	36.4%

WITHOUT "NOT PROVIDED"**Q3. Then, please indicate if your needs are being met in Pinehurst. (without "not provided")**

(N=711)

	Yes	No
Q3-1. Sense of community	92.1%	7.9%
Q3-2. Quality of public education	79.9%	20.1%
Q3-3. Types of housing	89.7%	10.3%
Q3-4. Quality of housing	88.7%	11.3%
Q3-5. Access to quality shopping	76.9%	23.1%
Q3-6. Availability of cultural arts opportunities	84.6%	15.4%
Q3-7. Availability of golfing opportunities	93.3%	6.7%
Q3-8. Availability of other recreational opportunities	81.0%	19.0%
Q3-9. Proximity to family or friends	85.9%	14.1%
Q3-10. Proximity to work	82.2%	17.8%
Q3-11. Safety & security	97.2%	2.8%
Q3-12. Quality health care	92.8%	7.2%
Q3-13. Opportunities and/or resources for senior citizens	89.9%	10.1%
Q3-14. Opportunities and/or resources for children under 18	71.8%	28.2%
Q3-15. Low property tax rate	87.2%	12.8%
Q3-16. Historic landmark designation	90.3%	9.7%

Q4. Perception of the Village of Pinehurst. Several items that may influence your perception of the Village of Pinehurst as a community are listed below. Please rate each item on a scale of 1 to 5, where 5 means "Excellent" and 1 means "Poor."

(N=711)

	Excellent	Good	Neutral	Below average	Poor	No opinion
Q4-1. Overall image of Village	63.7%	31.6%	2.1%	0.4%	0.0%	2.1%
Q4-2. Overall quality of life in Village	59.5%	35.3%	2.5%	0.1%	0.1%	2.4%
Q4-3. Overall feeling of safety in Village	71.2%	25.2%	1.8%	0.1%	0.0%	1.7%
Q4-4. Quality of new residential development in Village	15.9%	28.3%	30.0%	11.5%	3.4%	11.0%
Q4-5. Quality of new commercial development in Village	13.5%	26.2%	36.8%	9.1%	3.0%	11.4%
Q4-6. As a place to live	71.7%	23.2%	2.1%	0.4%	0.0%	2.5%
Q4-7. As a place to raise children	38.0%	24.9%	12.8%	1.5%	0.7%	22.1%
Q4-8. As a place to retire	70.0%	21.9%	3.2%	0.4%	0.3%	4.1%
Q4-9. Overall appearance of public spaces across Village	63.6%	30.0%	3.0%	1.1%	0.3%	2.1%
Q4-10. Availability of affordable housing	14.3%	24.3%	26.2%	13.8%	6.5%	14.9%
Q4-11. Overall quality of Village services	48.1%	42.3%	6.5%	0.4%	0.3%	2.4%

WITHOUT "NO OPINION"**Q4. Perception of the Village of Pinehurst. Several items that may influence your perception of the Village of Pinehurst as a community are listed below. Please rate each item on a scale of 1 to 5, where 5 means "Excellent" and 1 means "Poor." (without "no opinion")**

(N=711)

	Excellent	Good	Neutral	Below average	Poor
Q4-1. Overall image of Village	65.1%	32.3%	2.2%	0.4%	0.0%
Q4-2. Overall quality of life in Village	61.0%	36.2%	2.6%	0.1%	0.1%
Q4-3. Overall feeling of safety in Village	72.4%	25.6%	1.9%	0.1%	0.0%
Q4-4. Quality of new residential development in Village	17.9%	31.8%	33.6%	13.0%	3.8%
Q4-5. Quality of new commercial development in Village	15.2%	29.5%	41.6%	10.3%	3.3%
Q4-6. As a place to live	73.6%	23.8%	2.2%	0.4%	0.0%
Q4-7. As a place to raise children	48.7%	31.9%	16.4%	2.0%	0.9%
Q4-8. As a place to retire	73.0%	22.9%	3.4%	0.4%	0.3%
Q4-9. Overall appearance of public spaces across Village	64.9%	30.6%	3.0%	1.1%	0.3%
Q4-10. Availability of affordable housing	16.9%	28.6%	30.7%	16.2%	7.6%
Q4-11. Overall quality of Village services	49.3%	43.4%	6.6%	0.4%	0.3%

Q5. Perceptions of Safety and Security. Using a scale of 1 to 5, where 5 means "Very Safe" and 1 means "Very Unsafe," please rate how safe you feel in the following situations.

(N=711)

	Very safe	Safe	Neutral	Unsafe	Very unsafe	No opinion
Q5-1. Walking alone in your neighborhood during the day	85.8%	11.5%	0.7%	0.4%	0.1%	1.4%
Q5-2. Walking alone in your neighborhood after dark	42.2%	34.5%	11.8%	4.6%	1.4%	5.5%
Q5-3. In Village parks & recreation facilities	45.0%	33.9%	9.4%	0.7%	0.0%	11.0%
Q5-4. In business areas of Village during the day	78.8%	19.0%	1.1%	0.0%	0.0%	1.1%
Q5-5. In business areas of Village after dark	39.9%	38.7%	11.7%	2.1%	0.4%	7.2%

WITHOUT "NO OPINION"

Q5. Perceptions of Safety and Security. Using a scale of 1 to 5, where 5 means "Very Safe" and 1 means "Very Unsafe," please rate how safe you feel in the following situations. (without "no opinion")

(N=711)

	Very safe	Safe	Neutral	Unsafe	Very unsafe
Q5-1. Walking alone in your neighborhood during the day	87.0%	11.7%	0.7%	0.4%	0.1%
Q5-2. Walking alone in your neighborhood after dark	44.6%	36.5%	12.5%	4.9%	1.5%
Q5-3. In Village parks & recreation facilities	50.6%	38.1%	10.6%	0.8%	0.0%
Q5-4. In business areas of Village during the day	79.7%	19.2%	1.1%	0.0%	0.0%
Q5-5. In business areas of Village after dark	43.0%	41.7%	12.6%	2.3%	0.5%

Q6. Public Safety Services. Using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied," please rate your satisfaction with each of the following items.

(N=711)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	No opinion
Q6-1. Efforts to prevent crimes	43.0%	38.4%	9.0%	1.1%	0.0%	8.4%
Q6-2. Enforcement of local traffic laws	31.5%	36.0%	14.5%	10.0%	2.7%	5.3%
Q6-3. How quickly police respond to emergencies	42.8%	29.0%	7.6%	0.0%	0.1%	20.5%
Q6-4. Frequency that police officers patrol your neighborhood	23.2%	32.8%	23.1%	8.7%	0.8%	11.4%
Q6-5. Fire prevention & education programs provided by Village	21.1%	21.9%	25.2%	1.7%	0.1%	30.0%
Q6-6. How quickly fire personnel respond to emergencies	42.8%	24.5%	7.7%	0.3%	0.3%	24.5%

WITHOUT "NO OPINION"

Q6. Public Safety Services. Using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied," please rate your satisfaction with each of the following items. (without "no opinion")

(N=711)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q6-1. Efforts to prevent crimes	47.0%	41.9%	9.8%	1.2%	0.0%
Q6-2. Enforcement of local traffic laws	33.3%	38.0%	15.3%	10.5%	2.8%
Q6-3. How quickly police respond to emergencies	53.8%	36.5%	9.6%	0.0%	0.2%
Q6-4. Frequency that police officers patrol your neighborhood	26.2%	37.0%	26.0%	9.8%	1.0%
Q6-5. Fire prevention & education programs provided by Village	30.1%	31.3%	35.9%	2.4%	0.2%
Q6-6. How quickly fire personnel respond to emergencies	56.6%	32.4%	10.2%	0.4%	0.4%

Q7. Which TWO of the Public Safety services listed in Question 6 do you think should receive the MOST EMPHASIS from Village leaders over the next TWO years?

Q7. Top choice	Number	Percent
Efforts to prevent crimes	304	42.8 %
Enforcement of local traffic laws	134	18.8 %
How quickly police respond to emergencies	56	7.9 %
Frequency that police officers patrol your neighborhood	72	10.1 %
Fire prevention & education programs provided by Village	23	3.2 %
How quickly fire personnel respond to emergencies	44	6.2 %
None chosen	78	11.0 %
Total	711	100.0 %

Q7. Which TWO of the Public Safety services listed in Question 6 do you think should receive the MOST EMPHASIS from Village leaders over the next TWO years?

Q7. 2nd choice	Number	Percent
Efforts to prevent crimes	88	12.4 %
Enforcement of local traffic laws	106	14.9 %
How quickly police respond to emergencies	133	18.7 %
Frequency that police officers patrol your neighborhood	131	18.4 %
Fire prevention & education programs provided by Village	54	7.6 %
How quickly fire personnel respond to emergencies	94	13.2 %
None chosen	105	14.8 %
Total	711	100.0 %

SUM OF TOP 2 CHOICES

Q7. Which TWO of the Public Safety services listed in Question 6 do you think should receive the MOST EMPHASIS from Village leaders over the next TWO years? (top 2)

Q7. Sum of top 2 choices	Number	Percent
Efforts to prevent crimes	392	55.1 %
Enforcement of local traffic laws	240	33.8 %
How quickly police respond to emergencies	189	26.6 %
Frequency that police officers patrol your neighborhood	203	28.6 %
Fire prevention & education programs provided by Village	77	10.8 %
How quickly fire personnel respond to emergencies	138	19.4 %
None chosen	78	11.0 %
Total	1317	

Q8. Solid Waste Services. Please rate your satisfaction with each of the following items using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

(N=711)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	No opinion
Q8-1. Residential trash collection services	71.6%	20.1%	3.7%	1.7%	0.3%	2.7%
Q8-2. Curbside recycling services	63.6%	22.2%	5.8%	3.4%	1.0%	4.1%
Q8-3. Yard waste collection services	64.8%	21.0%	4.6%	1.8%	0.7%	7.0%

WITHOUT "NO OPINION"

Q8. Solid Waste Services. Please rate your satisfaction with each of the following items using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied." (without "no opinion")

(N=711)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q8-1. Residential trash collection services	73.6%	20.7%	3.8%	1.7%	0.3%
Q8-2. Curbside recycling services	66.3%	23.2%	6.0%	3.5%	1.0%
Q8-3. Yard waste collection services	69.7%	22.5%	5.0%	2.0%	0.8%

Q9. Cultural and Recreation Services. Please indicate whether you or other members of your household have used these Cultural and Recreation Services during the past year.

(N=711)

	Yes	No
Q9-1. Greenway trails	51.5%	48.5%
Q9-2. Village sponsored cultural/arts events	54.3%	45.7%
Q9-3. Cannon Park	35.3%	64.7%
Q9-4. Arboretum/Timmel Pavilion	41.1%	58.9%
Q9-5. Rassie Wicker Park	49.2%	50.8%
Q9-6. Camelot Playground	25.0%	75.0%
Q9-7. Splash pad at Wicker Park	15.8%	84.2%
Q9-8. West Pinehurst Park (e.g., disc golf)	6.5%	93.5%
Q9-9. Community Center	27.3%	72.7%
Q9-10. Youth recreation programs	8.0%	92.0%
Q9-11. Adult recreation programs	12.0%	88.0%
Q9-12. Recreation program registration	12.7%	87.3%

Q9. Cultural and Recreation Services. If "yes," please rate your satisfaction with that item using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

(N=564)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	No opinion
Q9-1. Greenway trails	48.4%	38.8%	5.2%	3.0%	0.8%	3.8%
Q9-2. Village sponsored cultural/arts events	45.3%	38.9%	9.6%	1.0%	0.0%	5.2%
Q9-3. Cannon Park	50.6%	37.8%	3.6%	0.8%	0.4%	6.8%
Q9-4. Arboretum/Timmel Pavilion	53.4%	34.6%	3.4%	1.0%	0.3%	7.2%
Q9-5. Rassie Wicker Park	52.6%	36.0%	4.9%	0.9%	0.3%	5.4%
Q9-6. Camelot Playground	57.9%	31.5%	3.4%	2.8%	0.0%	4.5%
Q9-7. Splash pad at Wicker Park	61.6%	27.7%	0.9%	5.4%	0.9%	3.6%
Q9-8. West Pinehurst Park (e.g., disc golf)	32.6%	47.8%	8.7%	10.9%	0.0%	0.0%
Q9-9. Community Center	49.0%	36.6%	5.7%	0.5%	0.0%	8.2%
Q9-10. Youth recreation programs	38.6%	42.1%	12.3%	3.5%	1.8%	1.8%
Q9-11. Adult recreation programs	43.5%	34.1%	10.6%	2.4%	2.4%	7.1%
Q9-12. Recreation program registration	45.6%	32.2%	14.4%	5.6%	1.1%	1.1%

WITHOUT "NO OPINION"**Q9. Cultural and Recreation Services. If "yes," please rate your satisfaction with that item using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied." (without "no opinion")**

(N=564)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q9-1. Greenway trails	50.3%	40.3%	5.4%	3.1%	0.9%
Q9-2. Village sponsored cultural/arts events	47.8%	41.0%	10.1%	1.1%	0.0%
Q9-3. Cannon Park	54.3%	40.6%	3.8%	0.9%	0.4%
Q9-4. Arboretum/Timmel Pavilion	57.6%	37.3%	3.7%	1.1%	0.4%
Q9-5. Rassie Wicker Park	55.6%	38.1%	5.1%	0.9%	0.3%
Q9-6. Camelot Playground	60.6%	32.9%	3.5%	2.9%	0.0%
Q9-7. Splash pad at Wicker Park	63.9%	28.7%	0.9%	5.6%	0.9%
Q9-8. West Pinehurst Park (e.g., disc golf)	32.6%	47.8%	8.7%	10.9%	0.0%
Q9-9. Community Center	53.4%	39.9%	6.2%	0.6%	0.0%
Q9-10. Youth recreation programs	39.3%	42.9%	12.5%	3.6%	1.8%
Q9-11. Adult recreation programs	46.8%	36.7%	11.4%	2.5%	2.5%
Q9-12. Recreation program registration	46.1%	32.6%	14.6%	5.6%	1.1%

Q10. Please rate your satisfaction with each item using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

(N=711)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	No opinion
Q10-1. Number of Village parks	35.0%	37.8%	9.1%	2.0%	1.0%	15.0%
Q10-2. Quality of Village parks	39.2%	36.0%	8.3%	0.8%	0.0%	15.6%
Q10-3. Variety of amenities in Village parks	27.3%	34.6%	15.3%	3.0%	0.4%	19.4%
Q10-4. Quality of recreation indoor facilities	19.4%	22.1%	17.6%	3.1%	0.1%	37.7%
Q10-5. Availability of recreation indoor facilities	14.9%	19.8%	20.1%	5.3%	1.1%	38.7%
Q10-6. Variety of amenities in recreation indoor facilities	14.9%	19.4%	19.7%	3.7%	1.0%	41.4%
Q10-7. Availability of walking/ greenway trails	35.0%	31.9%	10.7%	4.4%	1.3%	16.7%
Q10-8. Condition of walking/ greenway trails	26.9%	35.4%	13.8%	3.4%	0.6%	20.0%
Q10-9. Quality of outdoor athletic fields & facilities	21.8%	24.3%	14.5%	0.4%	0.0%	39.0%
Q10-10. Availability of outdoor athletic fields & facilities	18.4%	23.6%	16.9%	2.0%	0.4%	38.7%
Q10-11. Availability of information about recreation programs	20.4%	28.8%	19.5%	5.6%	1.0%	24.6%
Q10-12. Quality of youth recreation programs	11.4%	14.1%	17.2%	1.4%	0.1%	55.8%
Q10-13. Quality of adult recreation programs	13.5%	18.7%	19.7%	2.7%	0.1%	45.3%
Q10-14. Variety of cultural arts events & programs in Southern Moore County	21.1%	33.2%	18.3%	4.2%	0.7%	22.5%

WITHOUT "NO OPINION"**Q10. Please rate your satisfaction with each item using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied." (without "no opinion")**

(N=711)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q10-1. Number of Village parks	41.2%	44.5%	10.8%	2.3%	1.2%
Q10-2. Quality of Village parks	46.5%	42.7%	9.8%	1.0%	0.0%
Q10-3. Variety of amenities in Village parks	33.9%	42.9%	19.0%	3.7%	0.5%
Q10-4. Quality of recreation indoor facilities	31.2%	35.4%	28.2%	5.0%	0.2%
Q10-5. Availability of recreation indoor facilities	24.3%	32.3%	32.8%	8.7%	1.8%
Q10-6. Variety of amenities in recreation indoor facilities	25.4%	33.1%	33.6%	6.2%	1.7%
Q10-7. Availability of walking/greenway trails	42.1%	38.3%	12.8%	5.2%	1.5%
Q10-8. Condition of walking/greenway trails	33.6%	44.3%	17.2%	4.2%	0.7%
Q10-9. Quality of outdoor athletic fields & facilities	35.7%	39.9%	23.7%	0.7%	0.0%
Q10-10. Availability of outdoor athletic fields & facilities	30.0%	38.5%	27.5%	3.2%	0.7%
Q10-11. Availability of information about recreation programs	27.1%	38.2%	25.9%	7.5%	1.3%
Q10-12. Quality of youth recreation programs	25.8%	31.8%	38.9%	3.2%	0.3%
Q10-13. Quality of adult recreation programs	24.7%	34.2%	36.0%	4.9%	0.3%
Q10-14. Variety of cultural arts events & programs in Southern Moore County	27.2%	42.8%	23.6%	5.4%	0.9%

Q11. Which THREE of the Cultural and Recreation Services items listed in Question 10 do you think should receive the MOST EMPHASIS from Village leaders over the next TWO years?

Q11. Top choice	Number	Percent
Number of Village parks	44	6.2 %
Quality of Village parks	89	12.5 %
Variety of amenities in Village parks	37	5.2 %
Quality of recreation indoor facilities	21	3.0 %
Availability of recreation indoor facilities	33	4.6 %
Variety of amenities in recreation indoor facilities	16	2.3 %
Availability of walking/greenway trails	80	11.3 %
Condition of walking/greenway trails	62	8.7 %
Quality of outdoor athletic fields & facilities	5	0.7 %
Availability of outdoor athletic fields & facilities	13	1.8 %
Availability of information about recreation programs	30	4.2 %
Quality of youth recreation programs	26	3.7 %
Quality of adult recreation programs	20	2.8 %
Variety of cultural arts events & programs in Southern Moore County	69	9.7 %
None chosen	166	23.3 %
Total	711	100.0 %

Q11. Which THREE of the Cultural and Recreation Services items listed in Question 10 do you think should receive the MOST EMPHASIS from Village leaders over the next TWO years?

Q11. 2nd choice	Number	Percent
Number of Village parks	18	2.5 %
Quality of Village parks	55	7.7 %
Variety of amenities in Village parks	43	6.0 %
Quality of recreation indoor facilities	22	3.1 %
Availability of recreation indoor facilities	38	5.3 %
Variety of amenities in recreation indoor facilities	21	3.0 %
Availability of walking/greenway trails	60	8.4 %
Condition of walking/greenway trails	81	11.4 %
Quality of outdoor athletic fields & facilities	18	2.5 %
Availability of outdoor athletic fields & facilities	15	2.1 %
Availability of information about recreation programs	48	6.8 %
Quality of youth recreation programs	18	2.5 %
Quality of adult recreation programs	40	5.6 %
Variety of cultural arts events & programs in Southern Moore County	37	5.2 %
None chosen	197	27.7 %
Total	711	100.0 %

Q11. Which THREE of the Cultural and Recreation Services items listed in Question 10 do you think should receive the MOST EMPHASIS from Village leaders over the next TWO years?

Q11. 3rd choice	Number	Percent
Number of Village parks	12	1.7 %
Quality of Village parks	44	6.2 %
Variety of amenities in Village parks	49	6.9 %
Quality of recreation indoor facilities	17	2.4 %
Availability of recreation indoor facilities	25	3.5 %
Variety of amenities in recreation indoor facilities	24	3.4 %
Availability of walking/greenway trails	42	5.9 %
Condition of walking/greenway trails	51	7.2 %
Quality of outdoor athletic fields & facilities	22	3.1 %
Availability of outdoor athletic fields & facilities	15	2.1 %
Availability of information about recreation programs	27	3.8 %
Quality of youth recreation programs	26	3.7 %
Quality of adult recreation programs	34	4.8 %
Variety of cultural arts events & programs in Southern Moore County	67	9.4 %
None chosen	256	36.0 %
Total	711	100.0 %

SUM OF TOP 3 CHOICES

Q11. Which THREE of the Cultural and Recreation Services items listed in Question 10 do you think should receive the MOST EMPHASIS from Village leaders over the next TWO years? (top 3)

Q11. Sum of top 3 choices	Number	Percent
Number of Village parks	74	10.4 %
Quality of Village parks	188	26.4 %
Variety of amenities in Village parks	129	18.1 %
Quality of recreation indoor facilities	60	8.4 %
Availability of recreation indoor facilities	96	13.5 %
Variety of amenities in recreation indoor facilities	61	8.6 %
Availability of walking/greenway trails	182	25.6 %
Condition of walking/greenway trails	194	27.3 %
Quality of outdoor athletic fields & facilities	45	6.3 %
Availability of outdoor athletic fields & facilities	43	6.0 %
Availability of information about recreation programs	105	14.8 %
Quality of youth recreation programs	70	9.8 %
Quality of adult recreation programs	94	13.2 %
Variety of cultural arts events & programs in Southern Moore County	173	24.3 %
None chosen	166	23.3 %
Total	1680	

Q12. Do you shop regularly in the Village Center (downtown)?

Q12. Do you shop regularly in Village Center (downtown)	Number	Percent
Yes	284	39.9 %
No	398	56.0 %
Not provided	29	4.1 %
Total	711	100.0 %

WITHOUT "NOT PROVIDED"**Q12. Do you shop regularly in the Village Center (downtown)? (without "not provided")**

Q12. Do you shop regularly in Village Center (downtown)	Number	Percent
Yes	284	41.6 %
No	398	58.4 %
Total	682	100.0 %

Q13. Do you regularly dine in the Village Center (downtown)?

Q13. Do you regularly dine in Village Center (downtown)	Number	Percent
Yes	383	53.9 %
No	303	42.6 %
Not provided	25	3.5 %
Total	711	100.0 %

WITHOUT "NOT PROVIDED"**Q13. Do you regularly dine in the Village Center (downtown)? (without "not provided")**

Q13. Do you regularly dine in Village Center (downtown)	Number	Percent
Yes	383	55.8 %
No	303	44.2 %
Total	686	100.0 %

Q14. Please check each of the following reasons that prevent you from shopping/dining regularly in the Village Center (downtown) more often.

Q14. Reasons that prevent you from shopping/dining regularly in Village Center (downtown) more often	Number	Percent
Stores' hours of operation	119	16.7 %
Variety of merchandise/menu options offered	240	33.8 %
Merchandise is more targeted to tourists than local shoppers	275	38.7 %
Parking availability	176	24.8 %
Wait times for dining	66	9.3 %
Prices	209	29.4 %
Other	62	8.7 %
Nothing prevents me from shopping/dining more often in Village Center	180	25.3 %
Total	1327	

Q15. Code Enforcement. Please rate your satisfaction with each of the following Village efforts to enforce regulations using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

(N=711)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	No opinion
Q15-1. Enforcing cleanup of litter & debris on private property	19.7%	31.6%	18.6%	10.7%	3.2%	16.2%
Q15-2. Enforcing mowing/cutting of weeds/grass on private property	18.4%	29.3%	20.5%	11.5%	3.5%	16.7%
Q15-3. Enforcing overnight right-of-way parking prohibition in residential neighborhoods	18.1%	24.1%	24.5%	6.6%	3.0%	23.8%
Q15-4. Enforcing restrictions on oversized vehicles in residential neighborhoods	18.4%	24.2%	23.6%	9.1%	2.3%	22.4%
Q15-5. Enforcing noise ordinances	19.0%	27.7%	23.3%	7.2%	4.6%	18.1%
Q15-6. Enforcing sign regulations	18.6%	28.3%	22.4%	7.7%	3.2%	19.8%
Q15-7. Enforcing solid waste cart regulations	23.5%	30.9%	19.0%	5.6%	1.5%	19.4%

WITHOUT "NO OPINION"

Q15. Code Enforcement. Please rate your satisfaction with each of the following Village efforts to enforce regulations using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied." (without "no opinion")

(N=711)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q15-1. Enforcing cleanup of litter & debris on private property	23.5%	37.8%	22.1%	12.8%	3.9%
Q15-2. Enforcing mowing/cutting of weeds/grass on private property	22.1%	35.1%	24.7%	13.9%	4.2%
Q15-3. Enforcing overnight right-of-way parking prohibition in residential neighborhoods	23.8%	31.5%	32.1%	8.7%	3.9%
Q15-4. Enforcing restrictions on oversized vehicles in residential neighborhoods	23.7%	31.2%	30.4%	11.8%	2.9%
Q15-5. Enforcing noise ordinances	23.2%	33.8%	28.5%	8.8%	5.7%
Q15-6. Enforcing sign regulations	23.2%	35.3%	27.9%	9.6%	4.0%
Q15-7. Enforcing solid waste cart regulations	29.1%	38.4%	23.6%	7.0%	1.9%

Q16. How would you describe the amount of effort the Village applies to enforce its codes and ordinances?

Q16. How would you describe the amount of effort
Village applies to enforce its codes & ordinances

	Number	Percent
About right	405	57.0 %
Too much	43	6.0 %
Too little	147	20.7 %
Not provided	116	16.3 %
Total	711	100.0 %

WITHOUT "NOT PROVIDED"**Q16. How would you describe the amount of effort the Village applies to enforce its codes and ordinances?****(without "not provided")**

Q16. How would you describe the amount of effort
Village applies to enforce its codes & ordinances

	Number	Percent
About right	405	68.1 %
Too much	43	7.2 %
Too little	147	24.7 %
Total	595	100.0 %

Q17. Transportation Services. Please rate your satisfaction with each of the following items using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

(N=711)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	No opinion
Q17-1. Maintenance of main Village street thoroughfares	42.8%	42.3%	6.9%	2.7%	0.3%	5.1%
Q17-2. Maintenance of streets in your neighborhood	30.2%	38.0%	11.5%	11.5%	2.0%	6.8%
Q17-3. Maintenance of street signs/pavement markings	33.3%	43.5%	13.8%	4.1%	0.4%	4.9%
Q17-4. Adequacy of street lighting	20.1%	28.3%	21.0%	18.1%	6.2%	6.3%
Q17-5. Ease of travel on NC Highway 5	9.7%	22.8%	20.4%	30.1%	12.8%	4.2%
Q17-6. Ease of travel through large traffic circle	19.5%	38.3%	19.0%	12.0%	8.2%	3.1%
Q17-7. Ease of travel on other streets in Village	30.7%	49.5%	13.5%	2.0%	0.6%	3.8%
Q17-8. Availability of walkways	18.4%	27.1%	17.9%	18.8%	8.7%	9.0%
Q17-9. Condition of existing walkways	20.1%	34.7%	23.3%	5.9%	2.0%	13.9%
Q17-10. Ease of golf cart travel	12.5%	18.0%	16.5%	5.1%	1.4%	46.6%

WITHOUT "NO OPINION"**Q17. Transportation Services. Please rate your satisfaction with each of the following items using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied." (without "no opinion")**

(N=711)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q17-1. Maintenance of main Village street thoroughfares	45.0%	44.6%	7.3%	2.8%	0.3%
Q17-2. Maintenance of streets in your neighborhood	32.4%	40.7%	12.4%	12.4%	2.1%
Q17-3. Maintenance of street signs/pavement markings	35.1%	45.7%	14.5%	4.3%	0.4%
Q17-4. Adequacy of street lighting	21.5%	30.2%	22.4%	19.4%	6.6%
Q17-5. Ease of travel on NC Highway 5	10.1%	23.8%	21.3%	31.4%	13.4%
Q17-6. Ease of travel through large traffic circle	20.2%	39.5%	19.6%	12.3%	8.4%
Q17-7. Ease of travel on other streets in Village	31.9%	51.5%	14.0%	2.0%	0.6%
Q17-8. Availability of walkways	20.2%	29.8%	19.6%	20.7%	9.6%
Q17-9. Condition of existing walkways	23.4%	40.4%	27.1%	6.9%	2.3%
Q17-10. Ease of golf cart travel	23.4%	33.7%	30.8%	9.5%	2.6%

Q18. Which THREE of the Transportation Services listed in Question 17 do you think should receive the MOST EMPHASIS from Village leaders over the next TWO years?

<u>Q18. Top choice</u>	<u>Number</u>	<u>Percent</u>
Maintenance of main Village street thoroughfares	61	8.6 %
Maintenance of streets in your neighborhood	77	10.8 %
Maintenance of street signs/pavement markings	14	2.0 %
Adequacy of street lighting	82	11.5 %
Ease of travel on NC Highway 5	181	25.5 %
Ease of travel through large traffic circle	96	13.5 %
Ease of travel on other streets in Village	4	0.6 %
Availability of walkways	84	11.8 %
Condition of existing walkways	10	1.4 %
Ease of golf cart travel	32	4.5 %
None chosen	70	9.8 %
Total	711	100.0 %

Q18. Which THREE of the Transportation Services listed in Question 17 do you think should receive the MOST EMPHASIS from Village leaders over the next TWO years?

<u>Q18. 2nd choice</u>	<u>Number</u>	<u>Percent</u>
Maintenance of main Village street thoroughfares	33	4.6 %
Maintenance of streets in your neighborhood	62	8.7 %
Maintenance of street signs/pavement markings	32	4.5 %
Adequacy of street lighting	93	13.1 %
Ease of travel on NC Highway 5	110	15.5 %
Ease of travel through large traffic circle	99	13.9 %
Ease of travel on other streets in Village	13	1.8 %
Availability of walkways	80	11.3 %
Condition of existing walkways	41	5.8 %
Ease of golf cart travel	26	3.7 %
None chosen	122	17.2 %
Total	711	100.0 %

Q18. Which THREE of the Transportation Services listed in Question 17 do you think should receive the MOST EMPHASIS from Village leaders over the next TWO years?

<u>Q18. 3rd choice</u>	<u>Number</u>	<u>Percent</u>
Maintenance of main Village street thoroughfares	44	6.2 %
Maintenance of streets in your neighborhood	61	8.6 %
Maintenance of street signs/pavement markings	41	5.8 %
Adequacy of street lighting	55	7.7 %
Ease of travel on NC Highway 5	66	9.3 %
Ease of travel through large traffic circle	58	8.2 %
Ease of travel on other streets in Village	35	4.9 %
Availability of walkways	72	10.1 %
Condition of existing walkways	59	8.3 %
Ease of golf cart travel	37	5.2 %
None chosen	183	25.7 %
Total	711	100.0 %

SUM OF TOP 3 CHOICES

Q18. Which THREE of the Transportation Services listed in Question 17 do you think should receive the MOST EMPHASIS from Village leaders over the next TWO years? (top 3)

<u>Q18. Sum of top 3 choices</u>	<u>Number</u>	<u>Percent</u>
Maintenance of main Village street thoroughfares	138	19.4 %
Maintenance of streets in your neighborhood	200	28.1 %
Maintenance of street signs/pavement markings	87	12.2 %
Adequacy of street lighting	230	32.3 %
Ease of travel on NC Highway 5	357	50.2 %
Ease of travel through large traffic circle	253	35.6 %
Ease of travel on other streets in Village	52	7.3 %
Availability of walkways	236	33.2 %
Condition of existing walkways	110	15.5 %
Ease of golf cart travel	95	13.4 %
None chosen	70	9.8 %
Total	1828	

Q19. Public Services. Please rate your satisfaction with each of the following items using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

(N=711)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	No opinion
Q19-1. Maintenance/preservation of Downtown	52.6%	37.1%	5.1%	1.1%	0.0%	4.1%
Q19-2. Quality of landscaping in medians & other public areas	63.6%	28.8%	3.5%	1.3%	0.4%	2.4%
Q19-3. Overall cleanliness of streets & other public areas	56.4%	36.3%	3.8%	0.8%	0.4%	2.3%
Q19-4. Quality of stormwater runoff/management system	22.8%	35.6%	18.1%	7.7%	4.9%	10.8%
Q19-5. Winter weather response on Village streets (snow/ice)	27.7%	34.0%	16.3%	2.7%	1.0%	18.3%

WITHOUT "NO OPINION"

Q19. Public Services. Please rate your satisfaction with each of the following items using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied." (without "no opinion")

(N=711)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q19-1. Maintenance/preservation of Downtown	54.8%	38.7%	5.3%	1.2%	0.0%
Q19-2. Quality of landscaping in medians & other public areas	65.1%	29.5%	3.6%	1.3%	0.4%
Q19-3. Overall cleanliness of streets & other public areas	57.7%	37.1%	3.9%	0.9%	0.4%
Q19-4. Quality of stormwater runoff/management system	25.6%	39.9%	20.3%	8.7%	5.5%
Q19-5. Winter weather response on Village streets (snow/ice)	33.9%	41.7%	20.0%	3.3%	1.2%

Q20. Which TWO of the Public Services items listed in Question 19 do you think should receive the MOST EMPHASIS from Village leaders over the next TWO years?

Q20. Top choice	Number	Percent
Maintenance/preservation of Downtown	187	26.3 %
Quality of landscaping in medians & other public areas	74	10.4 %
Overall cleanliness of streets & other public areas	106	14.9 %
Quality of stormwater runoff/management system	213	30.0 %
Winter weather response on Village streets (snow/ice)	40	5.6 %
None chosen	91	12.8 %
Total	711	100.0 %

Q20. Which TWO of the Public Services items listed in Question 19 do you think should receive the MOST EMPHASIS from Village leaders over the next TWO years?

Q20. 2nd choice	Number	Percent
Maintenance/preservation of Downtown	75	10.5 %
Quality of landscaping in medians & other public areas	123	17.3 %
Overall cleanliness of streets & other public areas	172	24.2 %
Quality of stormwater runoff/management system	87	12.2 %
Winter weather response on Village streets (snow/ice)	103	14.5 %
None chosen	151	21.2 %
Total	711	100.0 %

SUM OF TOP 2 CHOICES

Q20. Which TWO of the Public Services items listed in Question 17 do you think should receive the MOST EMPHASIS from Village leaders over the next TWO years? (top 2)

Q20. Sum of top 2 choices	Number	Percent
Maintenance/preservation of Downtown	262	36.8 %
Quality of landscaping in medians & other public areas	197	27.7 %
Overall cleanliness of streets & other public areas	278	39.1 %
Quality of stormwater runoff/management system	300	42.2 %
Winter weather response on Village streets (snow/ice)	143	20.1 %
None chosen	91	12.8 %
Total	1271	

Q21. Please indicate whether you or other members of your household have used these Village services and facilities during the past year.

(N=711)

	Yes	No
Q21-1. Fire services	10.5%	89.5%
Q21-2. Police services	18.6%	81.4%
Q21-3. Village Hall reception desk	27.0%	73.0%
Q21-4. MyVOP service request system	20.5%	79.5%
Q21-5. Submitted a code & ordinance enforcement issue	11.8%	88.2%
Q21-6. Planning & inspections services	13.2%	86.8%
Q21-7. Library services	37.4%	62.6%
Q21-8. Archives services	12.7%	87.3%

Q21. If "yes," please rate your satisfaction with that item using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

(N=490)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	No opinion
Q21-1. Fire services	82.7%	12.0%	1.3%	0.0%	0.0%	4.0%
Q21-2. Police services	68.2%	18.9%	1.5%	5.3%	0.0%	6.1%
Q21-3. Village Hall reception desk	69.3%	20.3%	2.1%	2.1%	0.5%	5.7%
Q21-4. MyVOP service request system	45.9%	31.5%	5.5%	8.9%	2.1%	6.2%
Q21-5. Submitted a code & ordinance enforcement issue	23.8%	27.4%	13.1%	20.2%	9.5%	6.0%
Q21-6. Planning & inspections services	46.8%	35.1%	7.4%	8.5%	0.0%	2.1%
Q21-7. Library services	51.1%	27.8%	6.8%	4.5%	1.9%	7.9%
Q21-8. Archives services	62.2%	23.3%	4.4%	1.1%	0.0%	8.9%

WITHOUT "NO OPINION"

Q21. If "yes," please rate your satisfaction with that item using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied." (without "no opinion")

(N=490)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q21-1. Fire services	86.1%	12.5%	1.4%	0.0%	0.0%
Q21-2. Police services	72.6%	20.2%	1.6%	5.6%	0.0%
Q21-3. Village Hall reception desk	73.5%	21.5%	2.2%	2.2%	0.6%
Q21-4. MyVOP service request system	48.9%	33.6%	5.8%	9.5%	2.2%
Q21-5. Submitted a code & ordinance enforcement issue	25.3%	29.1%	13.9%	21.5%	10.1%
Q21-6. Planning & inspections services	47.8%	35.9%	7.6%	8.7%	0.0%
Q21-7. Library services	55.5%	30.2%	7.3%	4.9%	2.0%
Q21-8. Archives services	68.3%	25.6%	4.9%	1.2%	0.0%

Q22. Public Communication and Outreach. Please rate your satisfaction with each of the following items using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

(N=711)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	No opinion
Q22-1. Quality of information about Village programs/services	28.1%	43.0%	16.3%	4.2%	0.4%	7.9%
Q22-2. Village efforts to keep you informed about local issues	26.3%	45.0%	14.9%	6.3%	0.4%	7.0%
Q22-3. Opportunities to participate in local government (advisory boards, volunteering)	18.1%	33.8%	23.9%	5.5%	1.0%	17.7%
Q22-4. Village social media	17.9%	31.9%	21.5%	3.1%	0.6%	25.0%
Q22-5. Village website (vopnc.org)	23.2%	38.5%	18.4%	2.7%	0.4%	16.7%
Q22-6. Village newsletter	25.7%	38.0%	16.5%	4.2%	1.1%	14.5%
Q22-7. Monthly Village eNews updates	18.4%	27.3%	22.5%	4.1%	0.6%	27.1%
Q22-8. Online engagement portals (engage.vopnc.org)	12.9%	20.8%	21.8%	2.5%	1.0%	40.9%
Q22-9. Community's progress toward meeting its strategic vision & mission	11.7%	26.2%	29.1%	4.1%	1.3%	27.7%

WITHOUT "NO OPINION"

Q22. Public Communication and Outreach. Please rate your satisfaction with each of the following items using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied." (without "no opinion")

(N=711)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q22-1. Quality of information about Village programs/ services	30.5%	46.7%	17.7%	4.6%	0.5%
Q22-2. Village efforts to keep you informed about local issues	28.3%	48.4%	16.0%	6.8%	0.5%
Q22-3. Opportunities to participate in local government (advisory boards, volunteering)	22.1%	41.0%	29.1%	6.7%	1.2%
Q22-4. Village social media	23.8%	42.6%	28.7%	4.1%	0.8%
Q22-5. Village website (vopnc.org)	27.9%	46.3%	22.1%	3.2%	0.5%
Q22-6. Village newsletter	30.1%	44.4%	19.2%	4.9%	1.3%
Q22-7. Monthly Village eNews updates	25.3%	37.5%	30.9%	5.6%	0.8%
Q22-8. Online engagement portals (engage.vopnc.org)	21.9%	35.2%	36.9%	4.3%	1.7%
Q22-9. Community's progress toward meeting its strategic vision & mission	16.1%	36.2%	40.3%	5.6%	1.8%

Q23. Which of the following do you use to get information about the Village of Pinehurst?

Q23. Which following do you use to get information about Village of Pinehurst	Number	Percent
Village employees	100	14.1 %
Village newsletter	436	61.3 %
Village website (vopnc.org)	344	48.4 %
Monthly Village eNews	141	19.8 %
Village mobile app (MYVOP)	124	17.4 %
Engage Pinehurst online engagement portal engage.vopnc.org)	29	4.1 %
Village social media (e.g., Facebook, X-formerly known as Twitter)	213	30.0 %
The Pilot newspaper	470	66.1 %
Attend or view public meetings	138	19.4 %
Other	36	5.1 %
Total	2031	

Q23-10. Other:

Q23-10. Other	Number	Percent
Word of mouth	10	27.8 %
Friends	6	16.7 %
Nextdoor	4	11.1 %
Neighbors	3	8.3 %
Friends, neighbors	1	2.8 %
Involvement with NAC	1	2.8 %
NEIGHBORHOOD FRIENDS	1	2.8 %
NAC	1	2.8 %
Welcome center visits	1	2.8 %
Residents	1	2.8 %
Church	1	2.8 %
Local people	1	2.8 %
Radio	1	2.8 %
Village Council members	1	2.8 %
Neighborhood representative	1	2.8 %
Neighbor	1	2.8 %
Instagram	1	2.8 %
Total	36	100.0 %

Q24. Please indicate how often you read the Village Newsletter, which is mailed to all residents.

Q24. How often do you read Village Newsletter, which
is mailed to all residents

	Number	Percent
All the time	463	65.1 %
Sometimes	114	16.0 %
Seldom	25	3.5 %
Never	44	6.2 %
Don't know	65	9.1 %
Total	711	100.0 %

WITHOUT "DON 'T KNOW"**Q24. Please indicate how often you read the Village Newsletter, which is mailed to all residents. (without "don't know")**

Q24. How often do you read Village Newsletter, which
is mailed to all residents

	Number	Percent
All the time	463	71.7 %
Sometimes	114	17.6 %
Seldom	25	3.9 %
Never	44	6.8 %
Total	646	100.0 %

Q25. Customer Service. Have you contacted the Village during the past year for customer support?

Q25. Have you contacted Village during past year for customer support	Number	Percent
Yes	208	29.3 %
No	498	70.0 %
Not provided	5	0.7 %
Total	711	100.0 %

WITHOUT "NOT PROVIDED"**Q25. Customer Service. Have you contacted the Village during the past year for customer support? (without "not provided")**

Q25. Have you contacted Village during past year for customer support	Number	Percent
Yes	208	29.5 %
No	498	70.5 %
Total	706	100.0 %

Q25a. Using a scale from 1 to 5, where 5 means "Always" and 1 means "Never," please rate your experience with Village employees (not elected officials) on the following behaviors.

(N=208)

	Always	Usually	Sometimes	Seldom	Never	No opinion
Q25a-1. Village staff was responsive to my needs	71.6%	17.3%	4.8%	1.4%	3.4%	1.4%
Q25a-2. Village staff was competent	73.1%	16.8%	4.3%	1.4%	1.0%	3.4%
Q25a-3. Village staff was courteous	79.3%	14.9%	2.9%	1.0%	0.5%	1.4%
Q25a-4. My issue was resolved promptly	62.0%	17.3%	10.1%	2.9%	2.9%	4.8%

WITHOUT "NO OPINION"

Q25a. Using a scale from 1 to 5, where 5 means "Always" and 1 means "Never," please rate your experience with Village employees (not elected officials) on the following behaviors. (without "no opinion")

(N=208)

	Always	Usually	Sometimes	Seldom	Never
Q25a-1. Village staff was responsive to my needs	72.7%	17.6%	4.9%	1.5%	3.4%
Q25a-2. Village staff was competent	75.6%	17.4%	4.5%	1.5%	1.0%
Q25a-3. Village staff was courteous	80.5%	15.1%	2.9%	1.0%	0.5%
Q25a-4. My issue was resolved promptly	65.2%	18.2%	10.6%	3.0%	3.0%

Q26. Capital Improvements. Of the community improvements listed below, which THREE would you select as the MOST IMPORTANT?

Q26. Which community improvements would you select as most important	Number	Percent
Additional walkway construction in neighborhoods	278	39.1 %
Additional greenway trails (walking paths)	180	25.3 %
Bicycle lanes & paths	191	26.9 %
Multi-purpose paths on main Village highways	143	20.1 %
Additional street lighting in neighborhoods	252	35.4 %
Additional stormwater (drainage) improvements	252	35.4 %
Additional street resurfacing	213	30.0 %
Additional parks & open spaces	75	10.5 %
Additional athletic fields	19	2.7 %
Fire Dept. station on Linden Rd.	96	13.5 %
Downtown parking	190	26.7 %
Total	1889	

Q27. If you own a home in the Village of Pinehurst, approximately 41% of your property tax bill goes to the Village of Pinehurst to fund the Village's operating budget. The balance of your bill goes to the County (59%). Considering this, how satisfied are you with the value you receive for the portion of your property taxes that funds the Village's operating budget?

Q27. How satisfied are you with the value you receive for the portion of your property taxes that funds

Village's operating budget	Number	Percent
Very satisfied	201	28.3 %
Satisfied	288	40.5 %
Neutral	124	17.4 %
Dissatisfied	21	3.0 %
Very dissatisfied	10	1.4 %
Don't know	67	9.4 %
Total	711	100.0 %

WITHOUT "DON'T KNOW"

Q27. If you own a home in the Village of Pinehurst, approximately 41% of your property tax bill goes to the Village of Pinehurst to fund the Village's operating budget. The balance of your bill goes to the County (59%). Considering this, how satisfied are you with the value you receive for the portion of your property taxes that funds the Village's operating budget? (without "don't know")

Q27. How satisfied are you with the value you receive for the portion of your property taxes that funds

Village's operating budget	Number	Percent
Very satisfied	201	31.2 %
Satisfied	288	44.7 %
Neutral	124	19.3 %
Dissatisfied	21	3.3 %
Very dissatisfied	10	1.6 %
Total	644	100.0 %

Q28a. The language passed to regulate short-term rentals in the community is:

Q28a. What is the language passed to regulate short-term rentals in the community	Number	Percent
Too lenient	174	24.5 %
Just right	235	33.1 %
Too strict	83	11.7 %
Not sure	219	30.8 %
Total	711	100.0 %

WITHOUT "NOT SURE"

Q28a. The language passed to regulate short-term rentals in the community is: (without "not sure")

Q28a. What is the language passed to regulate short-term rentals in the community	Number	Percent
Too lenient	174	35.4 %
Just right	235	47.8 %
Too strict	83	16.9 %
Total	492	100.0 %

Q28b. I believe the Village's enforcement of short-term rental related regulations is:

Q28b. What is Village's enforcement of short-term rental related regulations	Number	Percent
Too little	188	26.4 %
About right	209	29.4 %
Too much	72	10.1 %
Not sure	242	34.0 %
Total	711	100.0 %

WITHOUT "NOT SURE"

Q28b. I believe the Village's enforcement of short-term rental related regulations is: (without "not sure")

Q28b. What is Village's enforcement of short-term rental related regulations	Number	Percent
Too little	188	40.1 %
About right	209	44.6 %
Too much	72	15.4 %
Total	469	100.0 %

Q29. Village Leadership. Please rate your level of satisfaction with the following items using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

(N=711)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	No opinion
Q29-1. Overall quality of leadership provided by Village's elected officials	18.1%	42.1%	20.0%	4.5%	3.1%	12.2%
Q29-2. Overall effectiveness of appointed boards & commissions	14.8%	39.4%	25.9%	3.5%	1.7%	14.8%
Q29-3. Overall effectiveness of Village Manager & appointed staff	22.2%	40.8%	21.4%	1.4%	2.0%	12.2%

WITHOUT "NO OPINIION"

Q29. Village Leadership. Please rate your level of satisfaction with the following items using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied." (without "no opinion")

(N=711)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q29-1. Overall quality of leadership provided by Village's elected officials	20.7%	47.9%	22.8%	5.1%	3.5%
Q29-2. Overall effectiveness of appointed boards & commissions	17.3%	46.2%	30.4%	4.1%	2.0%
Q29-3. Overall effectiveness of Village Manager & appointed staff	25.3%	46.5%	24.4%	1.6%	2.2%

Q30. How would you rate your satisfaction with the following in the Village of Pinehurst compared to other places you have lived in the past?

(N=711)

	Significantly better	Better	Same	Worse	Significantly worse	No opinion
Q30-1. Overall quality of life	48.0%	31.2%	16.2%	1.7%	0.0%	3.0%
Q30-2. Overall quality of Village services	36.4%	36.1%	21.2%	2.4%	0.3%	3.5%
Q30-3. Customer service provided by Village employees	35.7%	27.3%	21.7%	1.0%	0.4%	13.9%

WITHOUT "NO OPINION"

Q30. How would you rate your satisfaction with the following in the Village of Pinehurst compared to other places you have lived in the past? (without "no opinion")

(N=711)

	Significantly better	Better	Same	Worse	Significantly worse
Q30-1. Overall quality of life	49.4%	32.2%	16.7%	1.7%	0.0%
Q30-2. Overall quality of Village services	37.8%	37.5%	22.0%	2.5%	0.3%
Q30-3. Customer service provided by Village employees	41.5%	31.7%	25.2%	1.1%	0.5%

Q31. Would you recommend the Village of Pinehurst to others as a place to live?

Q31. Would you recommend Village of Pinehurst to others as a place to live	Number	Percent
Yes	643	90.4 %
No	37	5.2 %
Not provided	31	4.4 %
Total	711	100.0 %

WITHOUT "NOT PROVIDED"**Q31. Would you recommend the Village of Pinehurst to others as a place to live? (without "not provided")**

Q31. Would you recommend Village of Pinehurst to others as a place to live	Number	Percent
Yes	643	94.6 %
No	37	5.4 %
Total	680	100.0 %

Q34. Approximately how many years have you lived in the Village of Pinehurst?

Q34. How many years have you lived in Village of Pinehurst	Number	Percent
Less than 5 years	160	22.5 %
5-10 years	155	21.8 %
11-20 years	147	20.7 %
20+ years	243	34.2 %
Not provided	6	0.8 %
Total	711	100.0 %

WITHOUT "NOT PROVIDED"**Q34. Approximately how many years have you lived in the Village of Pinehurst? (without "not provided")**

Q34. How many years have you lived in Village of Pinehurst	Number	Percent
Less than 5 years	160	22.7 %
5-10 years	155	22.0 %
11-20 years	147	20.9 %
20+ years	243	34.5 %
Total	705	100.0 %

Q35. Do you have school-age children (grades K-12) living at home?

Q35. Do you have school-age children (grades K-12) living at home		
	Number	Percent
Yes	114	16.0 %
No	591	83.1 %
Not provided	6	0.8 %
Total	711	100.0 %

WITHOUT "NOT PROVIDED"**Q35. Do you have school-age children (grades K-12) living at home? (without "not provided")**

Q35. Do you have school-age children (grades K-12) living at home		
	Number	Percent
Yes	114	16.2 %
No	591	83.8 %
Total	705	100.0 %

Q35a. What grade level(s) are your school-age children?

Q35a. What grade levels are your school-age children		
	Number	Percent
K-5	58	50.9 %
6-8	42	36.8 %
High school	53	46.5 %
Total	153	

Q36. Which of the following best describes your current employment status?

Q36. Which following best describes your current employment status	Number	Percent
Employed outside the home	197	27.7 %
Employed in the home/have a home-based business	67	9.4 %
Student	2	0.3 %
Retired	416	58.5 %
Not currently employed	10	1.4 %
Not provided	19	2.7 %
Total	711	100.0 %

WITHOUT "NOT PROVIDED"**Q36. Which of the following best describes your current employment status? (without "not provided")**

Q36. Which following best describes your current employment status	Number	Percent
Employed outside the home	197	28.5 %
Employed in the home/have a home-based business	67	9.7 %
Student	2	0.3 %
Retired	416	60.1 %
Not currently employed	10	1.4 %
Total	692	100.0 %

Q36-1. "If employed outside the home," what is the zip code where you work?

<u>Q36-1. What is the zip code where you work</u>	<u>Number</u>	<u>Percent</u>
28374	95	53.7 %
28387	31	17.5 %
28310	6	3.4 %
28315	6	3.4 %
27376	5	2.8 %
28308	4	2.3 %
28376	4	2.3 %
28345	3	1.7 %
28301	1	0.6 %
46373	1	0.6 %
27511	1	0.6 %
87185	1	0.6 %
27615	1	0.6 %
10022	1	0.6 %
28202	1	0.6 %
28347	1	0.6 %
28304	1	0.6 %
27332	1	0.6 %
27330	1	0.6 %
25311	1	0.6 %
28312	1	0.6 %
28352	1	0.6 %
28306	1	0.6 %
28327	1	0.6 %
28303	1	0.6 %
28370	1	0.6 %
47374	1	0.6 %
27409	1	0.6 %
17870	1	0.6 %
28307	1	0.6 %
21401	1	0.6 %
Total	177	100.0 %

Q37. Which of the following best describes your age?

<u>Q37. Which following best describes your age</u>	<u>Number</u>	<u>Percent</u>
18-34	53	7.5 %
35-44	66	9.3 %
45-54	96	13.5 %
55-64	117	16.5 %
65+	355	49.9 %
Not provided	24	3.4 %
Total	711	100.0 %

WITHOUT "NOT PROVIDED"**Q37. Which of the following best describes your age? (without "not provided")**

<u>Q37. Which following best describes your age</u>	<u>Number</u>	<u>Percent</u>
18-34	53	7.7 %
35-44	66	9.6 %
45-54	96	14.0 %
55-64	117	17.0 %
65+	355	51.7 %
Total	687	100.0 %

Q38. Which of the following best describes your race?

<u>Q38. Your race</u>	<u>Number</u>	<u>Percent</u>
Asian or Asian Indian	14	2.0 %
Black or African American	13	1.8 %
American Indian or Alaska Native	5	0.7 %
White or Caucasian	637	89.6 %
Native Hawaiian or other Pacific Islander	2	0.3 %
Hispanic, Spanish, or Latino/a/x	18	2.5 %
Other	2	0.3 %
Total	691	

Q38-7. Self-describe your race:

<u>Q38-7. Self-describe your race</u>	<u>Number</u>	<u>Percent</u>
WHITE SPANISH GERMAN	1	50.0 %
Multiple races	1	50.0 %
Total	2	100.0 %

Q39. Which of the following best describes the general neighborhood areas where you live?

Q39. Which following best describes the general neighborhood area where you live	Number	Percent
Pinehurst No. 6	106	14.9 %
Pinehurst Trace/Pinedale/Midland Country Club/Taylorhurst/ Walker Station	43	6.0 %
Pinehurst No. 7/Lawn & Tennis/CCNC	32	4.5 %
Morganton/Monticello Rd.	63	8.9 %
Lake Pinehurst/Burning Tree/St. Andrews/Cotswold	184	25.9 %
Pinewild	85	12.0 %
Old Town/Linden Rd./Donald Ross Dr./Clarendon Gardens	93	13.1 %
Village Acres/Murdocksville Rd.	81	11.4 %
<u>Not provided</u>	<u>24</u>	<u>3.4 %</u>
Total	711	100.0 %

WITHOUT "NOT PROVIDED"**Q39. Which of the following best describes the general neighborhood areas where you live? (without "not provided")**

Q39. Which following best describes the general neighborhood area where you live	Number	Percent
Pinehurst No. 6	106	15.4 %
Pinehurst Trace/Pinedale/Midland Country Club/Taylorhurst/ Walker Station	43	6.3 %
Pinehurst No. 7/Lawn & Tennis/CCNC	32	4.7 %
Morganton/Monticello Rd.	63	9.2 %
Lake Pinehurst/Burning Tree/St. Andrews/Cotswold	184	26.8 %
Pinewild	85	12.4 %
Old Town/Linden Rd./Donald Ross Dr./Clarendon Gardens	93	13.5 %
<u>Village Acres/Murdocksville Rd.</u>	<u>81</u>	<u>11.8 %</u>
Total	687	100.0 %

Q40. What is your gender?

<u>Q40. Your gender</u>	<u>Number</u>	<u>Percent</u>
Male	348	48.9 %
Female	356	50.1 %
Non-binary	1	0.1 %
Prefer to self-describe	1	0.1 %
Not provided	5	0.7 %
Total	711	100.0 %

WITHOUT "NOT PROVIDED"**Q40. What is your gender? (without "not provided")**

<u>Q40. Your gender</u>	<u>Number</u>	<u>Percent</u>
Male	348	49.3 %
Female	356	50.4 %
Non-binary	1	0.1 %
Prefer to self-describe	1	0.1 %
Total	706	100.0 %

Q40-4. Self-describe your gender:

<u>Q40-4. Self-describe your gender</u>	<u>Number</u>	<u>Percent</u>
Transmale	1	100.0 %
Total	1	100.0 %

Q41. Do you own or rent your current residence?

Q41. Do you own or rent your current residence	Number	Percent
Own	642	90.3 %
Rent	60	8.4 %
Not provided	9	1.3 %
Total	711	100.0 %

WITHOUT "NOT PROVIDED"**Q41. Do you own or rent your current residence? (without "not provided")**

Q41. Do you own or rent your current residence	Number	Percent
Own	642	91.5 %
Rent	60	8.5 %
Total	702	100.0 %

Q42. What is your total annual household income?

Q42. Your total annual household income	Number	Percent
Under \$30K	31	4.4 %
\$30K to \$59,999	69	9.7 %
\$60K to \$99,999	170	23.9 %
\$100K to \$149,999	138	19.4 %
\$150K+	151	21.2 %
Not provided	152	21.4 %
Total	711	100.0 %

WITHOUT "NOT PROVIDED"**Q42. What is your total annual household income? (without "not provided")**

Q42. Your total annual household income	Number	Percent
Under \$30K	31	5.5 %
\$30K to \$59,999	69	12.3 %
\$60K to \$99,999	170	30.4 %
\$100K to \$149,999	138	24.7 %
\$150K+	151	27.0 %
Total	559	100.0 %



5

Survey Instrument



HISTORY, CHARM, AND SOUTHERN HOSPITALITY _____

July 2024

Dear Village of Pinehurst Resident,

Each year, the Village of Pinehurst surveys its residents to obtain feedback on how the Village is meeting the needs of its citizens. We invite you to participate in this year's Community Survey by providing your personal opinion. By taking approximately 20 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 PinehurstCommunitySurvey.org.

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 2024 Community 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



2024 Village of Pinehurst Community 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 resident concerns. If you have questions, please contact Jeff Sanborn, Village Manager at (910) 295-1900, ext. 1101 or at jsanborn@vopnc.org.

1. **Overall Satisfaction with Village Services.** Please rate your level of satisfaction with each of the following major categories of services provided by the Village of Pinehurst using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	No Opinion
01. Police services	5	4	3	2	1	9
02. Fire services	5	4	3	2	1	9
03. Parks and recreation programs	5	4	3	2	1	9
04. Parks and recreation facilities	5	4	3	2	1	9
05. Solid waste services	5	4	3	2	1	9
06. Street and right-of-way maintenance	5	4	3	2	1	9
07. Library and archives services	5	4	3	2	1	9
08. Enforcement of Village codes and ordinances	5	4	3	2	1	9
09. Customer service provided by Village employees	5	4	3	2	1	9
10. Village communication with residents	5	4	3	2	1	9
11. Village efforts at maintaining the quality of your neighborhood	5	4	3	2	1	9
12. Promotion of natural resource conservation	5	4	3	2	1	9
13. Level of public involvement in local decisions	5	4	3	2	1	9

2. **From the list of items in Question 1, which THREE of the major categories of Village services do you think should receive the MOST EMPHASIS from Village leaders over the next TWO years?** [Write in your answers below using the numbers from the list in Question 1.]

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

3. **Reasons to Stay in Pinehurst.** Several reasons to consider residing in the Village of Pinehurst are listed below. On a scale from 1 to 4, where 4 is "Very Important" and 1 is "Unimportant," please rate how important each reason is in your decision to stay where you live. Then, please indicate if your needs are being met in Pinehurst.

	Very Important	Somewhat Important	Not Sure	Unimportant	Are your needs being met in Pinehurst?	
01. Sense of community	4	3	2	1	Yes	No
02. Quality of public education	4	3	2	1	Yes	No
03. Types of housing	4	3	2	1	Yes	No
04. Quality of housing	4	3	2	1	Yes	No
05. Access to quality shopping	4	3	2	1	Yes	No
06. Availability of cultural arts opportunities	4	3	2	1	Yes	No
07. Availability of golfing opportunities	4	3	2	1	Yes	No
08. Availability of other recreational opportunities	4	3	2	1	Yes	No
09. Proximity to family or friends	4	3	2	1	Yes	No
10. Proximity to work	4	3	2	1	Yes	No
11. Safety and security	4	3	2	1	Yes	No
12. Quality health care	4	3	2	1	Yes	No
13. Opportunities and/or resources for senior citizens	4	3	2	1	Yes	No
14. Opportunities and/or resources for children under 18	4	3	2	1	Yes	No
15. Low property tax rate	4	3	2	1	Yes	No
16. Historic landmark designation	4	3	2	1	Yes	No

4. Perception of the Village of Pinehurst. Several items that may influence your perception of the Village of Pinehurst as a community are listed below. Please rate each item on a scale of 1 to 5, where 5 means "Excellent" and 1 means "Poor."

	Excellent	Good	Neutral	Below Average	Poor	No Opinion
01. Overall image of the Village	5	4	3	2	1	9
02. Overall quality of life in the Village	5	4	3	2	1	9
03. Overall feeling of safety in the Village	5	4	3	2	1	9
04. Quality of new residential development in the Village	5	4	3	2	1	9
05. Quality of new commercial development in the Village	5	4	3	2	1	9
06. As a place to live	5	4	3	2	1	9
07. As a place to raise children	5	4	3	2	1	9
08. As a place to retire	5	4	3	2	1	9
09. Overall appearance of public spaces across the Village	5	4	3	2	1	9
10. Availability of affordable housing	5	4	3	2	1	9
11. Overall quality of Village services	5	4	3	2	1	9

5. Perceptions of Safety and Security. Using a scale of 1 to 5, where 5 means "Very Safe" and 1 means "Very Unsafe," please rate how safe you feel in the following situations.

	Very Safe	Safe	Neutral	Unsafe	Very Unsafe	No Opinion
1. Walking alone in your neighborhood during the day	5	4	3	2	1	9
2. Walking alone in your neighborhood after dark	5	4	3	2	1	9
3. In Village parks and recreation facilities	5	4	3	2	1	9
4. In business areas of the Village during the day	5	4	3	2	1	9
5. In business areas of the Village after dark	5	4	3	2	1	9

6. Public Safety Services. Using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied," please rate your satisfaction with each of the following items.

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	No Opinion
1. Efforts to prevent crimes	5	4	3	2	1	9
2. Enforcement of local traffic laws	5	4	3	2	1	9
3. How quickly police respond to emergencies	5	4	3	2	1	9
4. Frequency that police officers patrol your neighborhood	5	4	3	2	1	9
5. Fire prevention and education programs provided by the Village	5	4	3	2	1	9
6. How quickly fire personnel respond to emergencies	5	4	3	2	1	9

7. Which TWO of the Public Safety Services listed in Question 6 do you think should receive the MOST EMPHASIS from Village leaders over the next TWO years? [Write in your answers below using the numbers from the list in Question 6.]

1st: ____ 2nd: ____

8. Solid Waste Services. Please rate your satisfaction with each of the following items using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	No Opinion
1. Residential trash collection services	5	4	3	2	1	9
2. Curbside recycling services	5	4	3	2	1	9
3. Yard waste collection services	5	4	3	2	1	9

9. **Cultural and Recreation Services.** Please indicate whether you or other members of your household have used these Cultural and Recreation Services during the past year by circling either "Yes or "No." If "Yes," please rate your satisfaction with that item using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

		Have you used this service in the past year?		Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	No Opinion
01.	Greenway trails	Yes	No	5	4	3	2	1	9
02.	Village sponsored cultural/arts events	Yes	No	5	4	3	2	1	9
03.	Cannon Park	Yes	No	5	4	3	2	1	9
04.	Arboretum/Timmel Pavilion	Yes	No	5	4	3	2	1	9
05.	Rassie Wicker Park	Yes	No	5	4	3	2	1	9
06.	Camelot Playground	Yes	No	5	4	3	2	1	9
07.	Splash pad at Wicker Park	Yes	No	5	4	3	2	1	9
08.	West Pinehurst Park (e.g., disc golf)	Yes	No	5	4	3	2	1	9
09.	Community Center	Yes	No	5	4	3	2	1	9
10.	Youth recreation programs	Yes	No	5	4	3	2	1	9
11.	Adult recreation programs	Yes	No	5	4	3	2	1	9
12.	Recreation program registration	Yes	No	5	4	3	2	1	9

10. **Please rate your satisfaction with 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	No Opinion
01.	Number of Village parks	5	4	3	2	1	9
02.	Quality of Village parks	5	4	3	2	1	9
03.	Variety of amenities in Village parks	5	4	3	2	1	9
04.	Quality of recreation indoor facilities	5	4	3	2	1	9
05.	Availability of recreation indoor facilities	5	4	3	2	1	9
06.	Variety of amenities in recreation indoor facilities	5	4	3	2	1	9
07.	Availability of walking/greenway trails	5	4	3	2	1	9
08.	Condition of walking/greenway trails	5	4	3	2	1	9
09.	Quality of outdoor athletic fields and facilities	5	4	3	2	1	9
10.	Availability of outdoor athletic fields and facilities	5	4	3	2	1	9
11.	Availability of information about recreation programs	5	4	3	2	1	9
12.	Quality of youth recreation programs	5	4	3	2	1	9
13.	Quality of adult recreation programs	5	4	3	2	1	9
14.	Variety of cultural arts events and programs in Southern Moore County	5	4	3	2	1	9

11. **Which THREE of the Cultural and Recreation Services items listed in Question 10 do you think should receive the MOST EMPHASIS from Village leaders over the next TWO years?** [Write in your answers below using the numbers from the list in Question 10.]

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

12. **Do you shop regularly in the Village Center (downtown)?** ____ (1) Yes ____ (2) No

13. **Do you regularly dine in the Village Center (downtown)?** ____ (1) Yes ____ (2) No

14. **Please check each of the following reasons that prevent you from shopping/dining regularly in the Village Center (downtown) more often.** [Check all that apply.]

- | | |
|---|--|
| ____ (1) Stores' hours of operation | ____ (5) Wait times for dining |
| ____ (2) Variety of merchandise/menu options offered | ____ (6) Prices |
| ____ (3) Merchandise is more targeted to tourists than local shoppers | ____ (7) Other: _____ |
| ____ (4) Parking availability | ____ (8) Nothing prevents me from shopping/dining more often in Village Center |

15. **Code Enforcement.** Please rate your satisfaction with each of the following Village efforts to enforce regulations using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

		Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	No Opinion
1.	Enforcing the cleanup of litter and debris on private property	5	4	3	2	1	9
2.	Enforcing mowing/cutting of weeds/grass on private property	5	4	3	2	1	9
3.	Enforcing overnight right-of-way parking prohibition in residential neighborhoods	5	4	3	2	1	9
4.	Enforcing restrictions on oversized vehicles in residential neighborhoods	5	4	3	2	1	9
5.	Enforcing noise ordinances	5	4	3	2	1	9
6.	Enforcing sign regulations	5	4	3	2	1	9
7.	Enforcing solid waste cart regulations	5	4	3	2	1	9

16. **How would you describe the amount of effort the Village applies to enforce its codes and ordinances?**

____(1) About right ____ (2) Too much ____ (3) Too little

17. **Transportation Services.** Please rate your satisfaction with each of the following items using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

		Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	No Opinion
01.	Maintenance of main Village street thoroughfares	5	4	3	2	1	9
02.	Maintenance of streets in your neighborhood	5	4	3	2	1	9
03.	Maintenance of street signs/pavement markings	5	4	3	2	1	9
04.	Adequacy of street lighting	5	4	3	2	1	9
05.	Ease of travel on NC Highway 5	5	4	3	2	1	9
06.	Ease of travel through the large traffic circle	5	4	3	2	1	9
07.	Ease of travel on other streets in the Village	5	4	3	2	1	9
08.	Availability of walkways	5	4	3	2	1	9
09.	Condition of existing walkways	5	4	3	2	1	9
10.	Ease of golf cart travel	5	4	3	2	1	9

18. **Which THREE of the Transportation Services items listed in Question 17 do you think should receive the MOST EMPHASIS from Village leaders over the next TWO years?** [Write in your answers below using the numbers from the list in Question 17.]

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

19. **Public Services.** Please rate your satisfaction with each of the following items using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

		Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	No Opinion
1.	Maintenance/Preservation of downtown	5	4	3	2	1	9
2.	Quality of landscaping in medians and other public areas	5	4	3	2	1	9
3.	Overall cleanliness of streets and other public areas	5	4	3	2	1	9
4.	Quality of the stormwater runoff/management system	5	4	3	2	1	9
5.	Winter weather response on Village streets (snow/ice)	5	4	3	2	1	9

20. **Which TWO of the Public Services items listed in Question 19 do you think should receive the MOST EMPHASIS from Village leaders over the next TWO years?** [Write in your answers below using the numbers from the list in Question 19.]

1st: ____ 2nd: ____

21. Please indicate whether you or other members of your household have used these Village services and facilities during the past year by circling either "Yes" or "No." If "Yes," please rate your satisfaction with that item using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

		Have you used these services or facilities in the past year?		Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	No Opinion
1.	Fire services	Yes	No	5	4	3	2	1	9
2.	Police services	Yes	No	5	4	3	2	1	9
3.	Village Hall reception desk	Yes	No	5	4	3	2	1	9
4.	The MyVOP service request system	Yes	No	5	4	3	2	1	9
5.	Submitted a code and ordinance enforcement issue	Yes	No	5	4	3	2	1	9
6.	Planning and inspections services	Yes	No	5	4	3	2	1	9
7.	Library services	Yes	No	5	4	3	2	1	9
8.	Archives services	Yes	No	5	4	3	2	1	9

22. **Public Communication and Outreach.** Please rate your satisfaction with each of the following items using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

		Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	No Opinion
1.	Quality of information about Village programs/services	5	4	3	2	1	9
2.	Village efforts to keep you informed about local issues	5	4	3	2	1	9
3.	Opportunities to participate in local government (advisory boards, volunteering)	5	4	3	2	1	9
4.	Village social media	5	4	3	2	1	9
5.	Village website (vopnc.org)	5	4	3	2	1	9
6.	Village newsletter	5	4	3	2	1	9
7.	Monthly Village e-News updates	5	4	3	2	1	9
8.	Online engagement portals (engage.vopnc.org)	5	4	3	2	1	9
9.	Community's progress toward meeting its strategic vision and mission	5	4	3	2	1	9

23. Which of the following do you use to get information about the Village of Pinehurst? [Check all that apply.]

- | | |
|---|--|
| <input type="checkbox"/> (01) Village employees | <input type="checkbox"/> (06) Engage Pinehurst online engagement portal (engage.vopnc.org) |
| <input type="checkbox"/> (02) Village newsletter | <input type="checkbox"/> (07) Village social media (e.g., Facebook, X - formerly known as Twitter) |
| <input type="checkbox"/> (03) Village website (vopnc.org) | <input type="checkbox"/> (08) The Pilot newspaper |
| <input type="checkbox"/> (04) Monthly Village e-News | <input type="checkbox"/> (09) Attend or view public meetings |
| <input type="checkbox"/> (05) Village mobile app (MYVOP) | <input type="checkbox"/> (10) Other: _____ |

24. Please indicate how often you read the Village Newsletter, which is mailed to all residents.

- (1) All the time (2) Sometimes (3) Seldom (4) Never (9) Don't know

25. **Customer Service.** Have you contacted the Village during the past year for customer support?

- (1) Yes [Answer Q25a.] (2) No [Skip to Q26.]

25a. Using a scale from 1 to 5, where 5 means "Always" and 1 means "Never," please rate your experience with Village employees (not elected officials) on the following behaviors.

		Always	Usually	Sometimes	Seldom	Never	No Opinion
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

26. Capital Improvements. Of the community improvements listed below, which THREE would you select as the MOST IMPORTANT?

- | | |
|--|--|
| <input type="checkbox"/> (01) Additional walkway construction in neighborhoods | <input type="checkbox"/> (07) Additional street resurfacing |
| <input type="checkbox"/> (02) Additional greenway trails (walking paths) | <input type="checkbox"/> (08) Additional parks and open spaces |
| <input type="checkbox"/> (03) Bicycle lanes and paths | <input type="checkbox"/> (09) Additional athletic fields |
| <input type="checkbox"/> (04) Multi-purpose paths on main Village highways | <input type="checkbox"/> (10) Fire Dept. station on Linden Rd. |
| <input type="checkbox"/> (05) Additional street lighting in neighborhoods | <input type="checkbox"/> (11) Downtown parking |
| <input type="checkbox"/> (06) Additional stormwater (drainage) improvements | |

27. If you own a home in the Village of Pinehurst, approximately 41% of your property tax bill goes to the Village of Pinehurst to fund the Village's operating budget. The balance of your bill goes to the County (59%). Considering this, how satisfied are you with the value you receive for the portion of your property taxes that funds the Village's operating budget?

- | | | |
|---|---|--|
| <input type="checkbox"/> (5) Very satisfied | <input type="checkbox"/> (3) Neutral | <input type="checkbox"/> (1) Very dissatisfied |
| <input type="checkbox"/> (4) Satisfied | <input type="checkbox"/> (2) Dissatisfied | <input type="checkbox"/> (9) Don't know |

In 2022, the Village of Pinehurst passed an ordinance (#22-15) to amend the Pinehurst Development Ordinance (PDO) to address concerns surrounding short-term rentals. Ordinance #22-15 defined short-term rentals, listed what zoning districts they can be allowed, and added special requirements related to minimum housing standards.

The definition of a short-term rental is a dwelling for lease or sublease of less than 30 consecutive days or a total of more than 14 days in any calendar year. Properties which had previously been lawfully operating as a short-term rental are allowed to continue to do so, so long as the operation does not cease for a period of 365 days or longer. Ordinance #22-15 also created a voluntary application process for which a lawfully existing short-term rental prior to the adoption of the ordinance could apply for, and receive, a non-conforming use certificate - an official declaration of the Village acknowledging the non-conforming status. The application period ended on October 26, 2022, one year after the adoption of Ordinance #22-15.

Additionally, regulations were adopted to the Municipal Code to regulate unreasonably loud noises and overnight parking in the right-of-way. Although these regulations apply to all properties in the Municipal limits and not just short-term rental properties, they were adopted to address some of the concerns related to short-term rentals.

The following questions are meant to gauge your thoughts following this passage:

28a. The language passed to regulate short-term rentals in the community is:

- | | | | |
|--|---|---|---------------------------------------|
| <input type="checkbox"/> (1) Too lenient | <input type="checkbox"/> (2) Just right | <input type="checkbox"/> (3) Too strict | <input type="checkbox"/> (9) Not sure |
|--|---|---|---------------------------------------|

28b. I believe the Village's enforcement of short-term rental related regulations is:

- | | | | |
|---|--|---------------------------------------|---------------------------------------|
| <input type="checkbox"/> (1) Too little | <input type="checkbox"/> (2) About right | <input type="checkbox"/> (3) Too much | <input type="checkbox"/> (9) Not sure |
|---|--|---------------------------------------|---------------------------------------|

29. Village Leadership. Please rate your level of satisfaction with the following items using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	No Opinion
1. Overall quality of leadership provided by the Village's elected officials	5	4	3	2	1	9
2. Overall effectiveness of appointed boards and commissions	5	4	3	2	1	9
3. Overall effectiveness of the Village Manager and appointed staff	5	4	3	2	1	9

30. How would you rate your satisfaction with the following in the Village of Pinehurst compared to other places you have lived 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

31. **Would you recommend the Village of Pinehurst to others as a place to live?**
 (1) Yes (2) No
32. **What are the most important issues facing the Village of Pinehurst today?**

33. **Do you have any suggestions for how the Village of Pinehurst could serve you better?**

Demographics

34. **Approximately how many years have you lived in the Village of Pinehurst?**
 (1) Less than 5 years (2) 5-10 years (3) 11-20 years (4) 20+ years
35. **Do you have school-age children (grades K-12) living at home?**
 (1) Yes (2) No *[Skip to Q36.]*
- 35a. **What grade level(s) are your school-age children? [Check all that apply.]**
 (1) K - 5 (2) 6 - 8 (3) High School
36. **Which of the following best describes your current employment status?**
 (1) Employed outside the home (3) Student
 (What is the zip code where you work? _____) (4) Retired
 (2) Employed in the home/have a home-based business (5) Not currently employed
37. **Which of the following best describes your age?**
 (1) Under 25 years (3) 35-44 years (5) 55-64 years
 (2) 25-34 years (4) 45-54 years (6) 65+ years
38. **Which of the following best describes your race? [Check all that apply.]**
 (01) Asian or Asian Indian (05) Native Hawaiian or other Pacific Islander
 (02) Black or African American (06) Hispanic, Spanish, or Latino/a/x
 (03) American Indian or Alaska Native (99) Other: _____
 (04) White or Caucasian
39. **Which of the following best describes the general neighborhood area where you live?**
 (1) Pinehurst No. 6 (5) Lake Pinehurst/Burning Tree/St. Andrews/Cotswold
 (2) Pinehurst Trace/Pinedale/Midland Country Club/Taylorhurst/Walker Station (6) Pinewild
 (3) Pinehurst No. 7/Lawn & Tennis/CCNC Gardens (7) Old Town/Linden Rd./Donald Ross Dr./Clarendon
 (4) Morganton/Monticello Rd. (8) Village Acres/Murdocksville Rd.
40. **What is your gender?**
 (1) Male (2) Female (3) Non-binary (4) Prefer to self-describe: _____
41. **Do you own or rent your current residence?** (1) Own (2) Rent
42. **What is your total annual household income?**
 (1) Under \$30,000 (3) \$60,000 to \$99,999 (5) \$150,000 or more
 (2) \$30,000 to \$59,999 (4) \$100,000 to \$149,999
43. **Would you be willing to participate in future surveys sponsored by the Village of Pinehurst?**
 (1) Yes *[Please provide your contact information below.]* (2) No

Mobile Phone Number: _____ Email Address: _____

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 on 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.