

Village of Pinehurst
2014 DirectionFinder®
Resident Survey Findings

Presented by

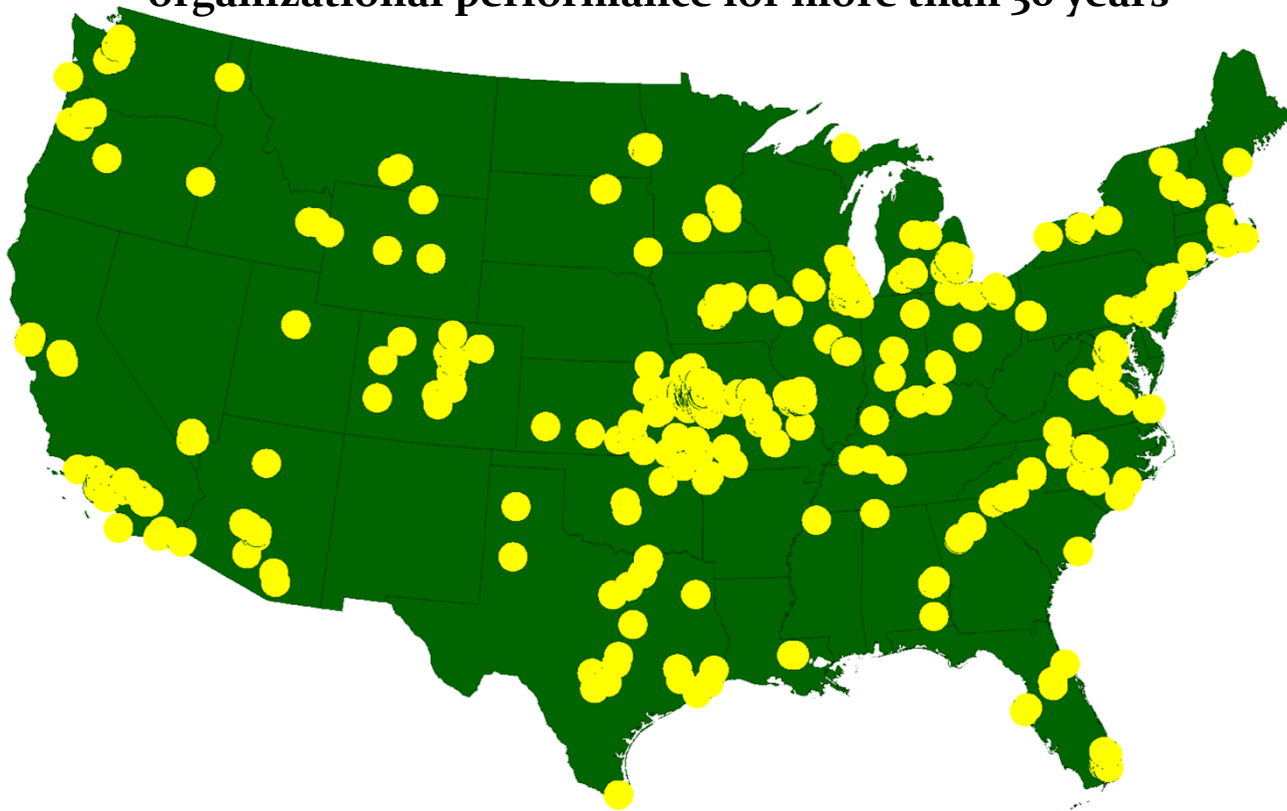


October 2014

ETC Institute

A National Leader in Market Research for Local Governmental Organizations

...helping Village and county governments gather and use survey data to enhance organizational performance for more than 30 years



More than 1,850,000 Persons Surveyed Since 2006
for more than 700 cities in 49 States

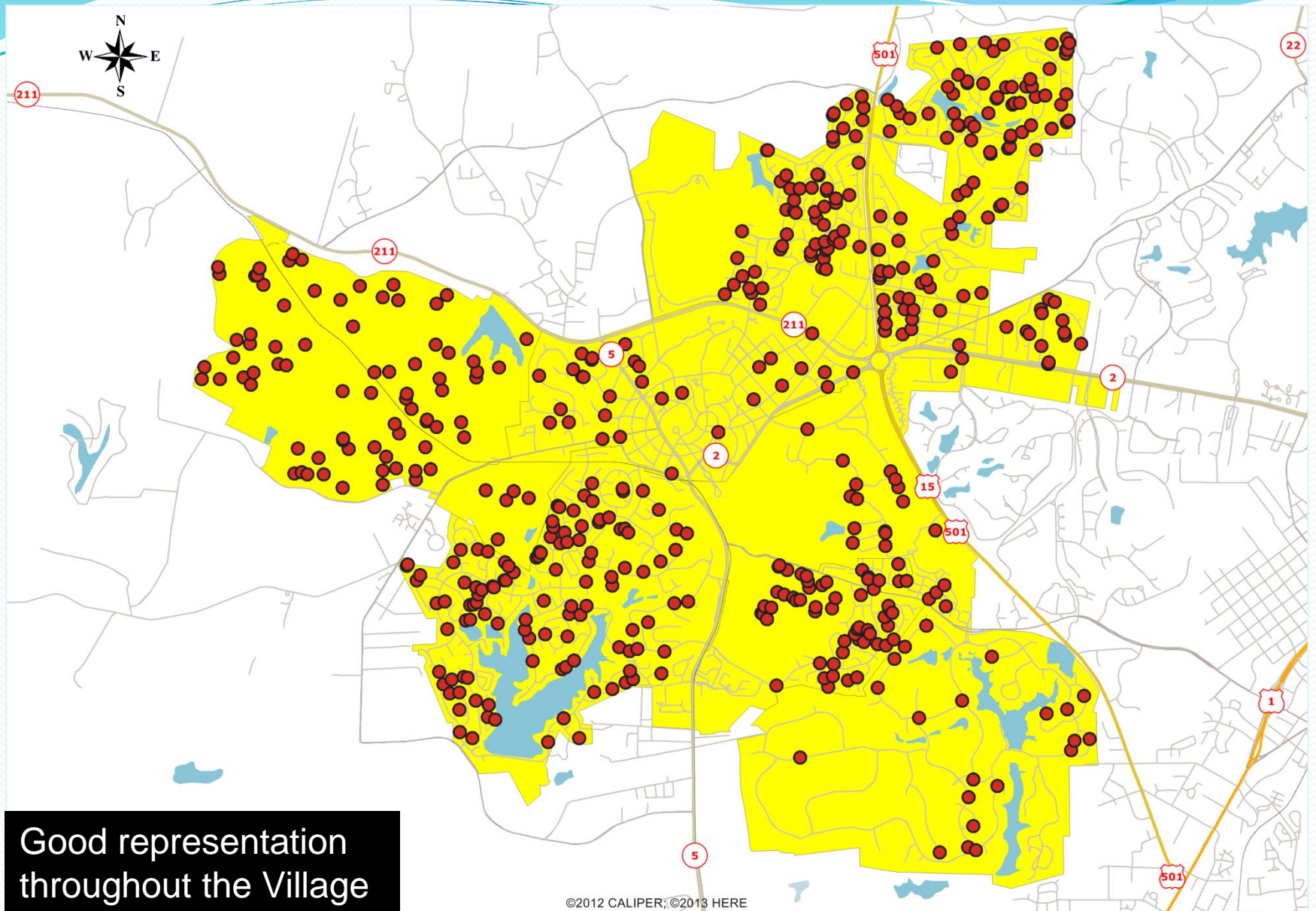
Purpose

- **To objectively assess citizen satisfaction with the delivery of major Village services**
- **To measure trends from 2012, 2013, and 2014**
- **To help determine priorities for the community**
- **To compare the Village's performance with residents regionally and nationally**

Methodology

- **Survey Description**
 - ❑ seven-page survey
 - ❑ third *DirectionFinder*® Survey conducted for the Village
 - ❑ included many of the same questions that were asked in previous years
- **Method of Administration**
 - ❑ by mail, phone, and online
 - ❑ each survey took approximately 15-20 minutes to complete
- **Sample size:** 506 completed surveys (goal was 400)
- **Confidence level:** 95%
- **Margin of error:** +/- 4.3% overall

Location of Survey Respondents



Good representation
throughout the Village

2014 Village of Pinehurst Resident Survey

Bottom Line Up Front

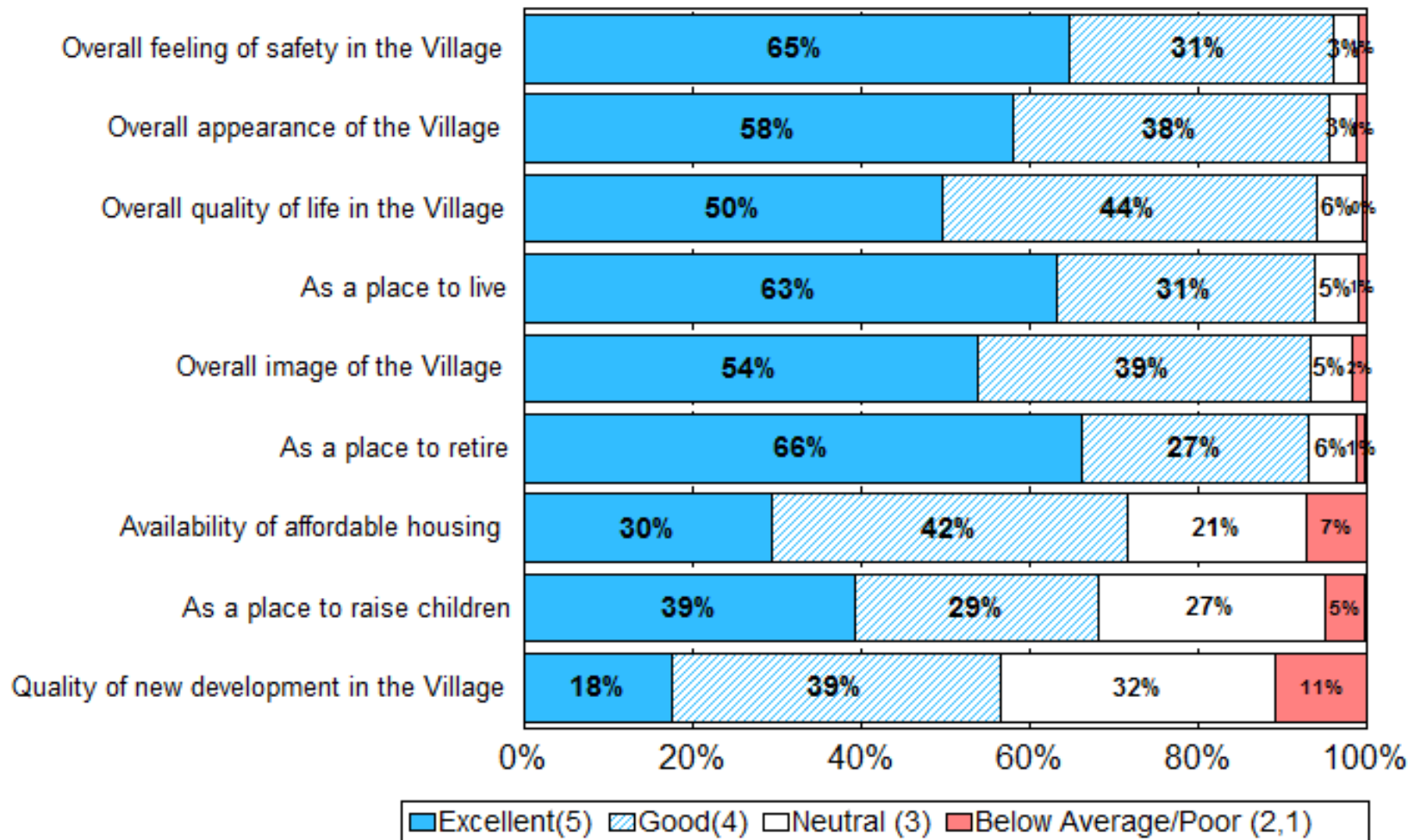
- **Residents Have a Very Positive Perception of the Village**
 - ❑ 95% would recommend Pinehurst to others as a place to live
 - ❑ 94% rated the overall quality of life in the Village as excellent or good
- **Analysis of Trends**
 - ❑ Overall satisfaction is similar to the 2012 and 2013 surveys
- **Pinehurst is Setting the Standard for Overall Service Delivery Compared to Other Communities**
 - ❑ The Village rated above the National Average in 38 of the 42 areas that were compared
 - ❑ The Village rated significantly above the National Average in 32 of the 42 areas that were compared
- **Overall priorities for improvement over the next 2 years:**
 - ❑ Enforcement of Village codes and ordinances
 - ❑ Efforts at maintaining the quality of neighborhoods
 - ❑ Street and right-of-way maintenance

Major Finding #1

Residents Have a Positive
Perception of the Village

Q4. Perception Residents Have of Pinehurst as a Community

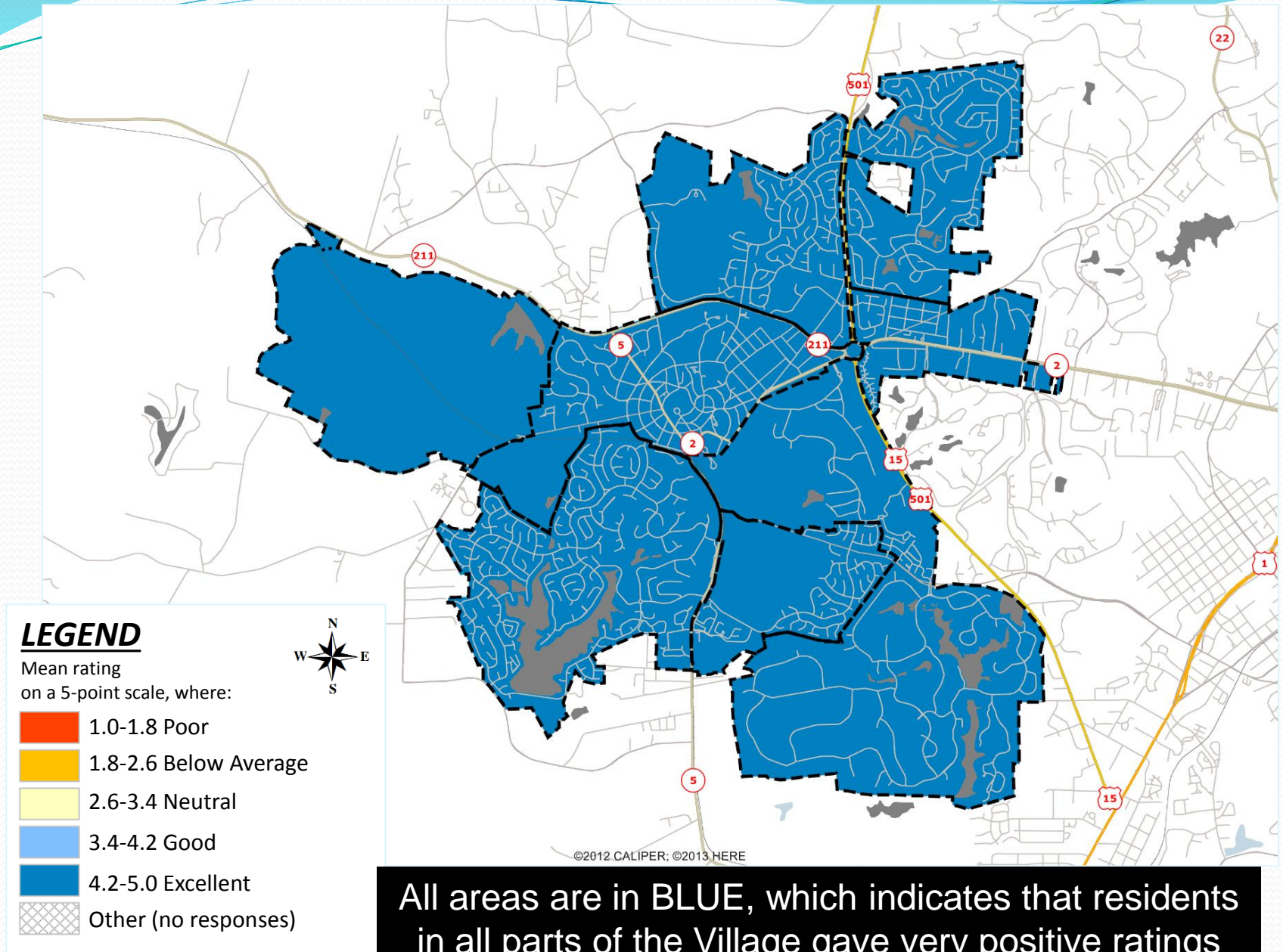
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (excluding "don't know")



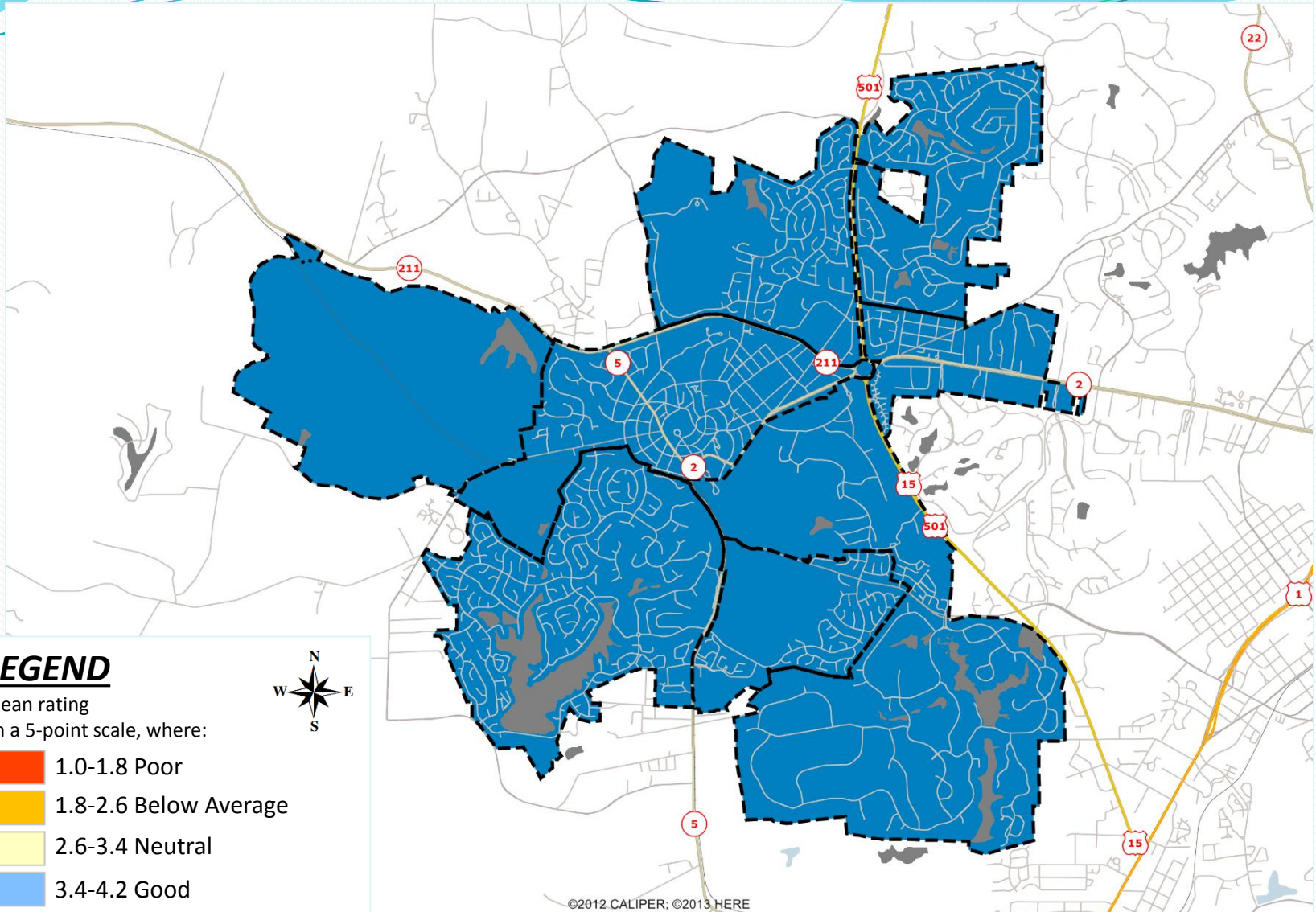
Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

94% of residents rated the overall quality of life in the Village as "excellent" or "good", and 94% rated the Village as an "excellent" or "good" place to live

Q4b. Overall Quality of Life in the Village



Q4e. Pinehurst as a Place to Live



LEGEND

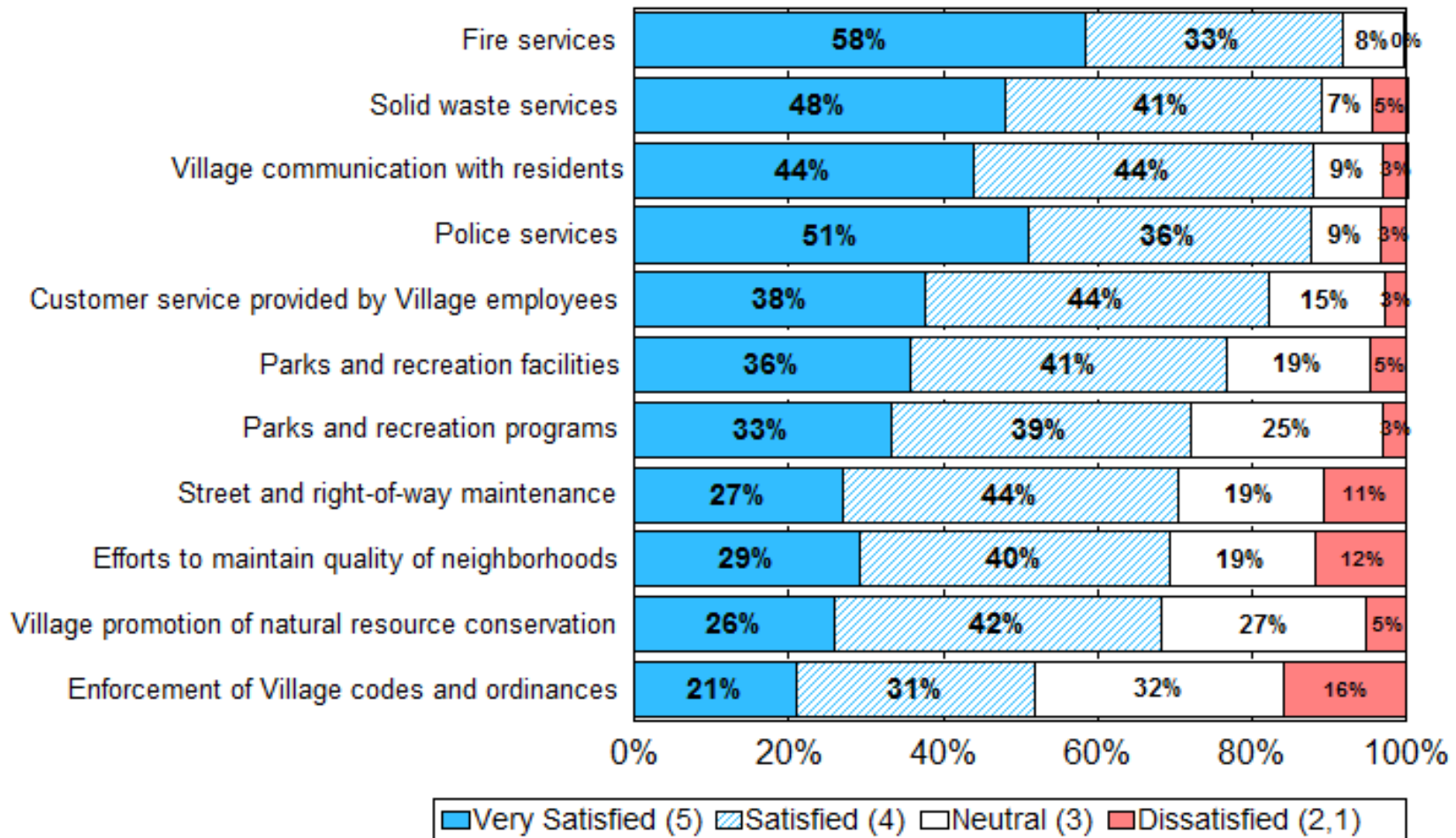
Mean rating
on a 5-point scale, where:

- 1.0-1.8 Poor
- 1.8-2.6 Below Average
- 2.6-3.4 Neutral
- 3.4-4.2 Good
- 4.2-5.0 Excellent
- Other (no responses)

All areas are in BLUE, which indicates that residents in all parts of the Village gave very positive ratings

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 "don't know")



Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

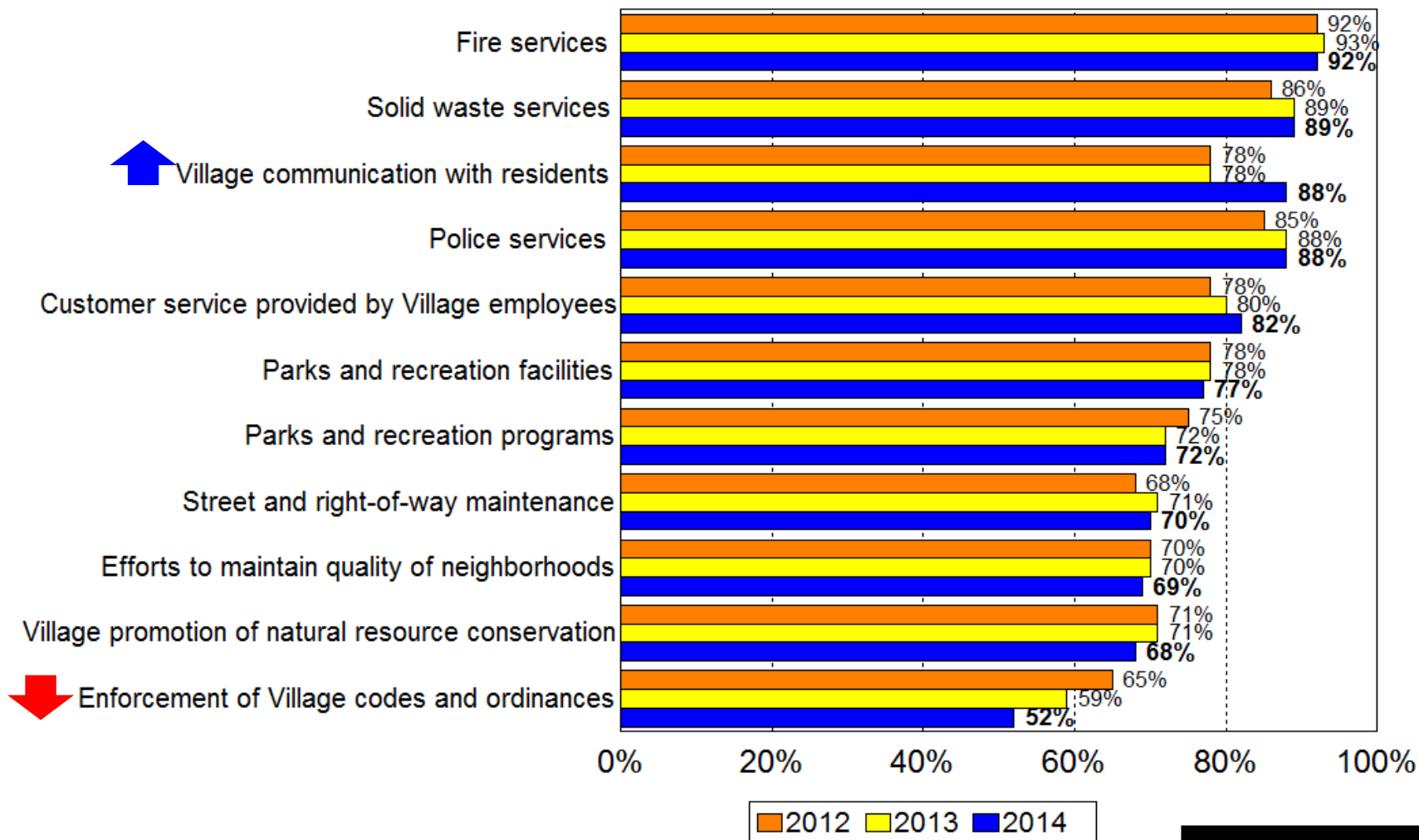
Less than 20% of the Residents Surveyed Were Dissatisfied with Any of the Major Categories of Village Services Rated

Major Finding #2

Overall Satisfaction Is Similar
to the 2012 and 2013 Surveys

Q1. Overall Satisfaction with Village of Pinehurst Services by Major Category - 2012, 2013 & 2014

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding "don't know")



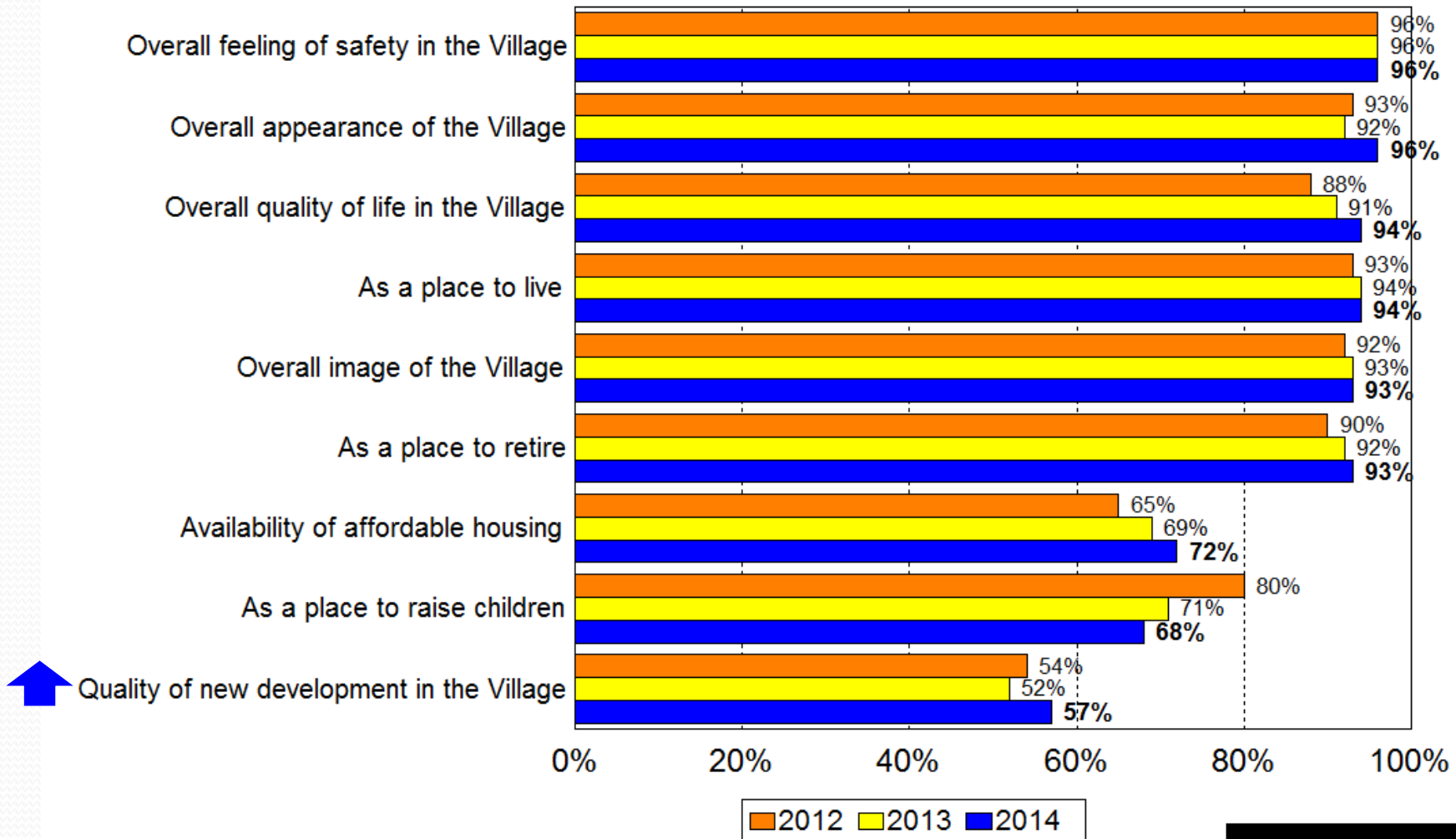
Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

TRENDS

Significant Increases From 2013: ↑ **Significant Decreases From 2013:** ↓

Q4. Perception Residents Have of Pinehurst as a Community - 2012, 2013 & 2014

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding "don't know")



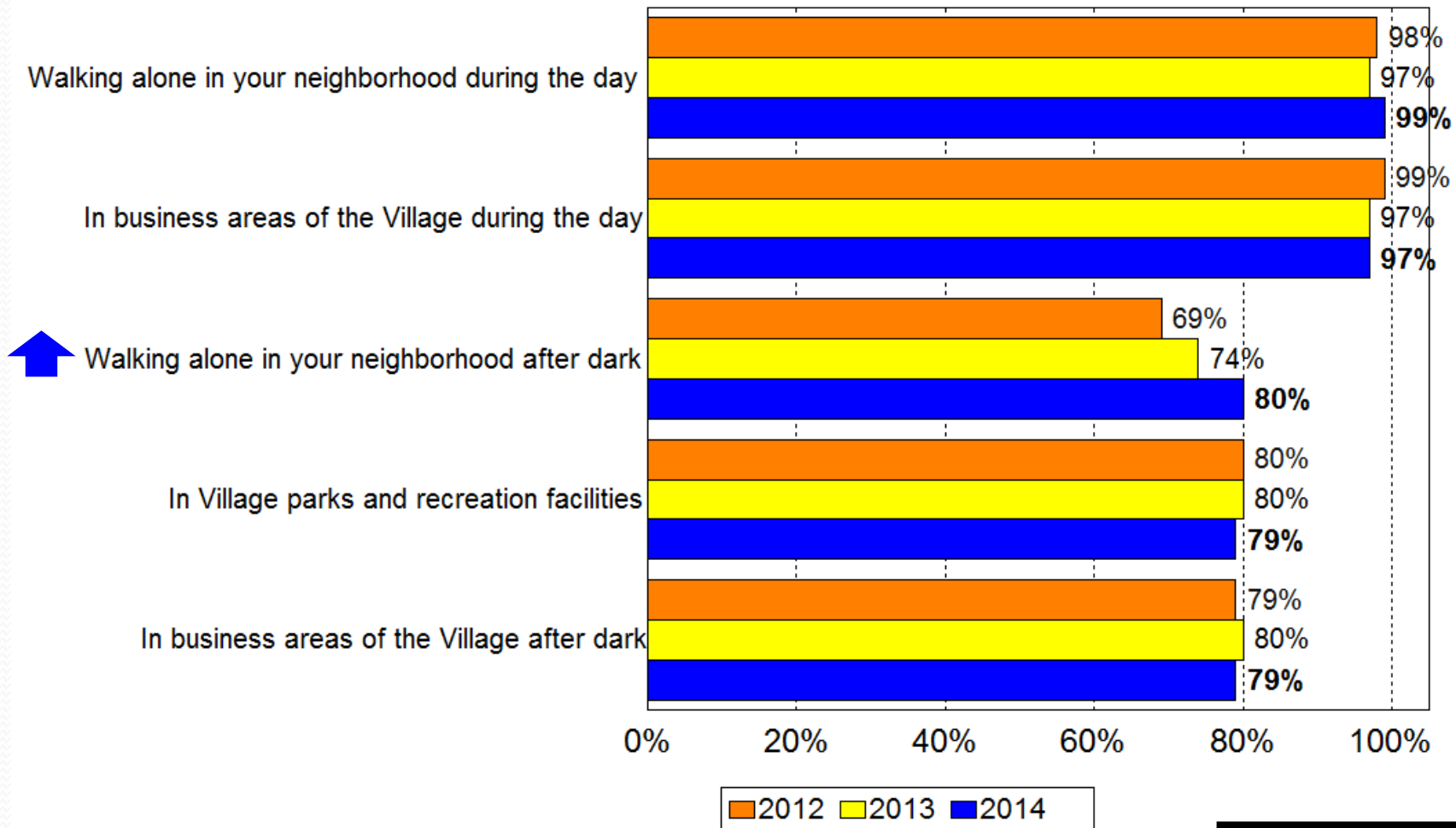
Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

TRENDS

Significant Increases From 2013: Significant Decreases From 2013:

Q5. Perceptions of Safety and Security in Pinehurst - 2012, 2013 & 2014

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding "don't know")



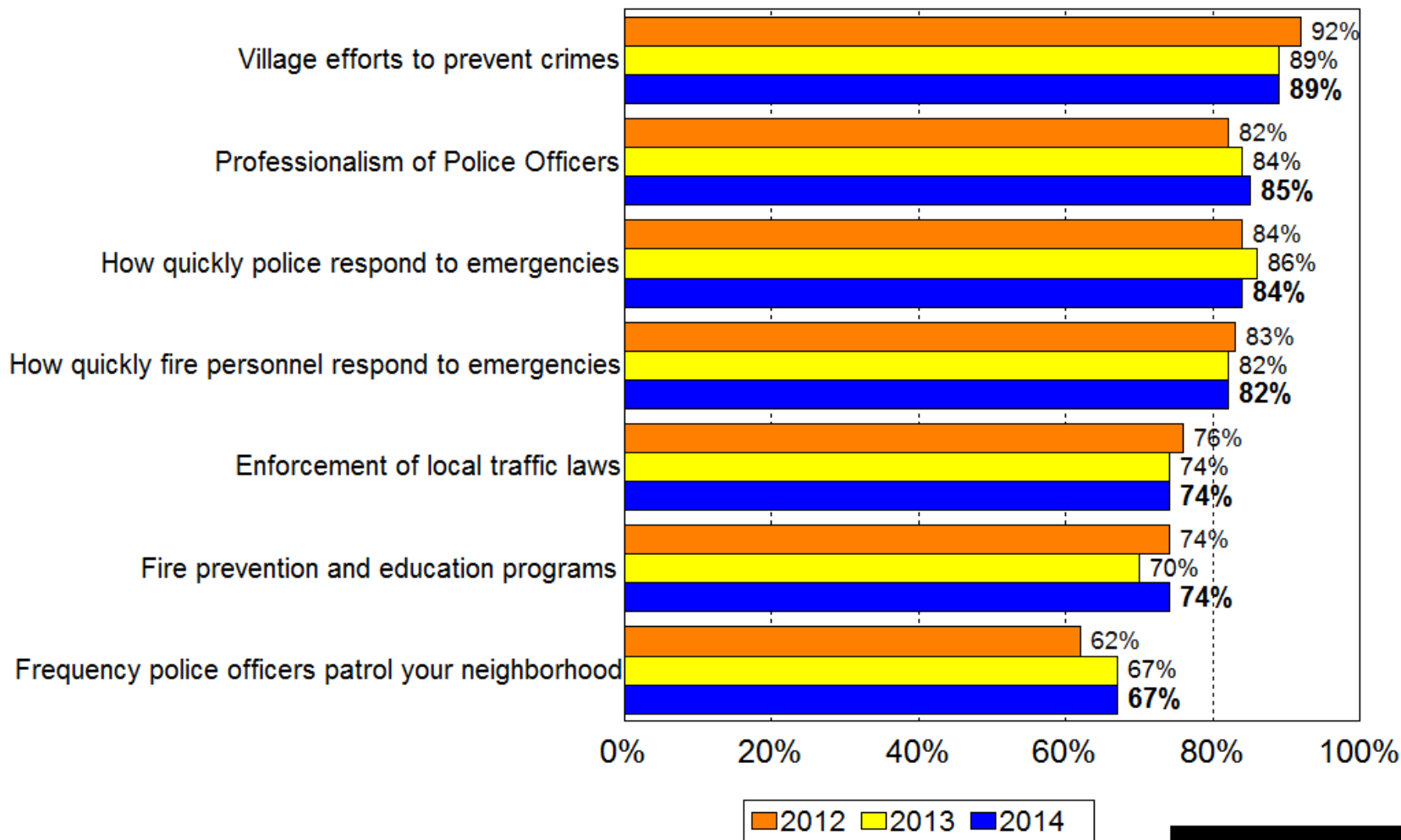
Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

TRENDS

Significant Increases From 2013:  Significant Decreases From 2013: 


Q6. Satisfaction with Various Aspects of Public Safety 2012, 2013 & 2014

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding "don't know")



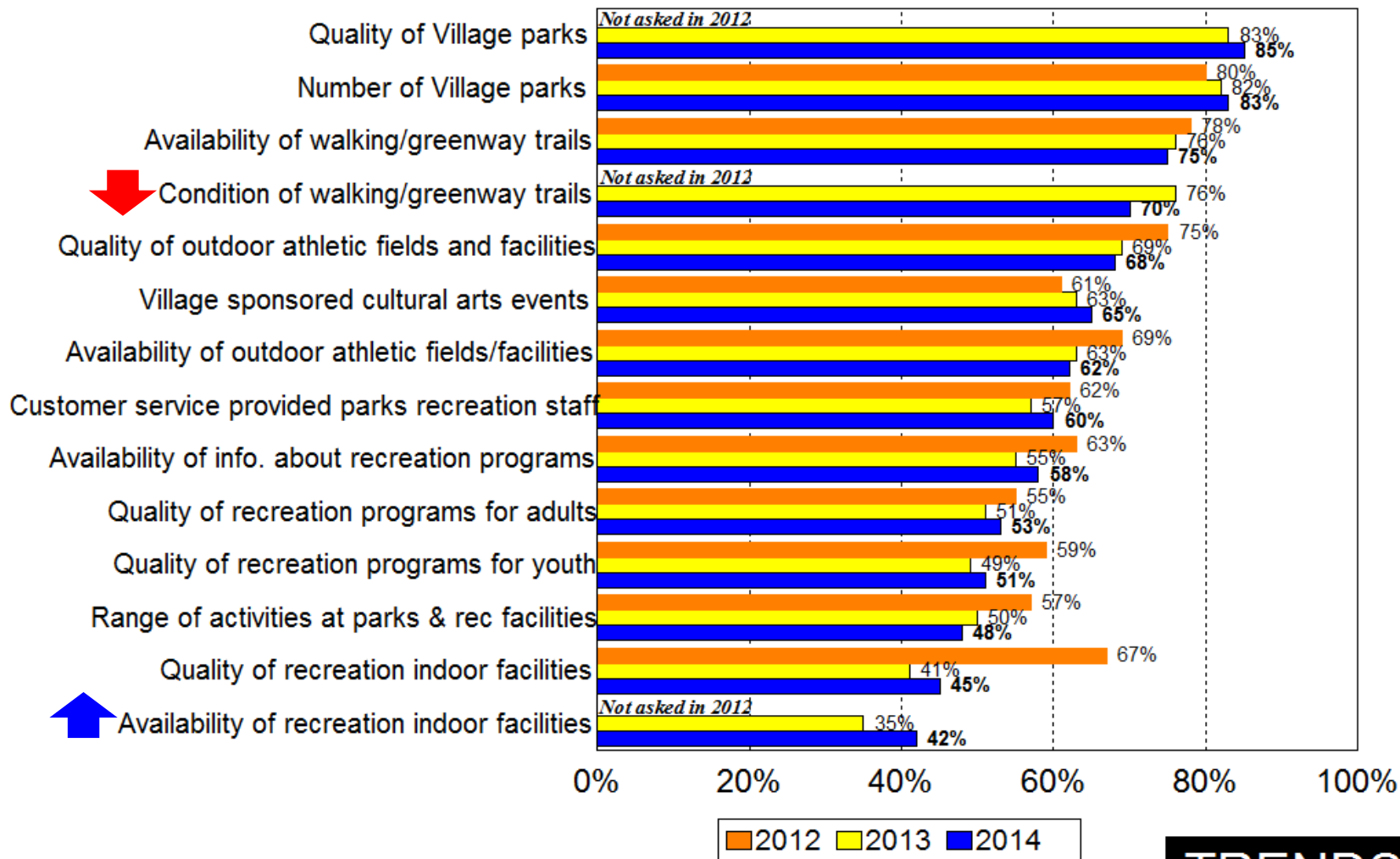
Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

TRENDS

Significant Increases From 2013:  **Significant Decreases From 2013:** 

Q8. Satisfaction with Various Aspects of Cultural and Recreation Services - 2012, 2013 & 2014

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding "don't know")



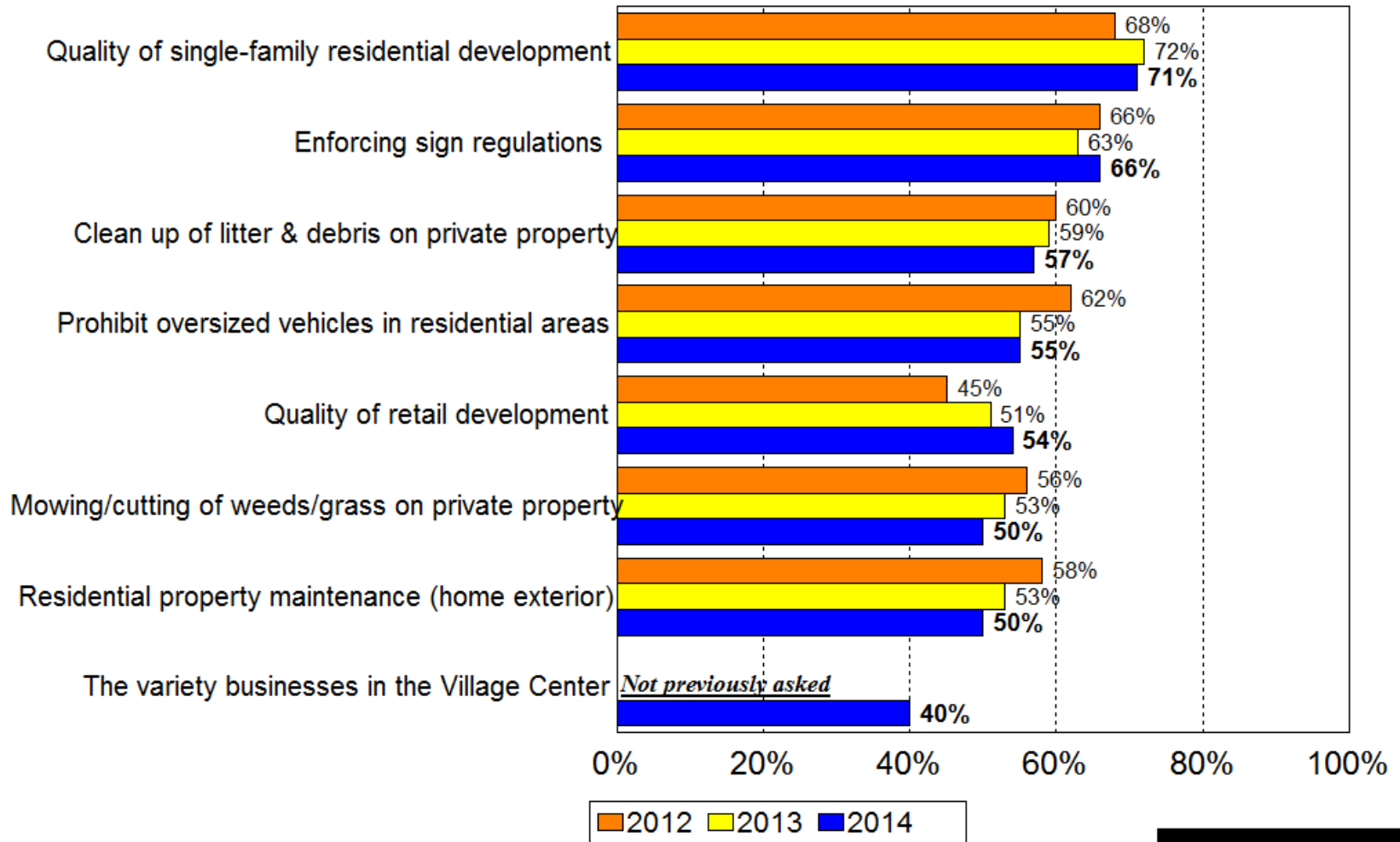
Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

TRENDS

Significant Increases From 2013: ↑ **Significant Decreases From 2013:** ↓

Q12. Satisfaction with Various Aspects of Community Development - 2012, 2013 & 2014

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding "don't know")



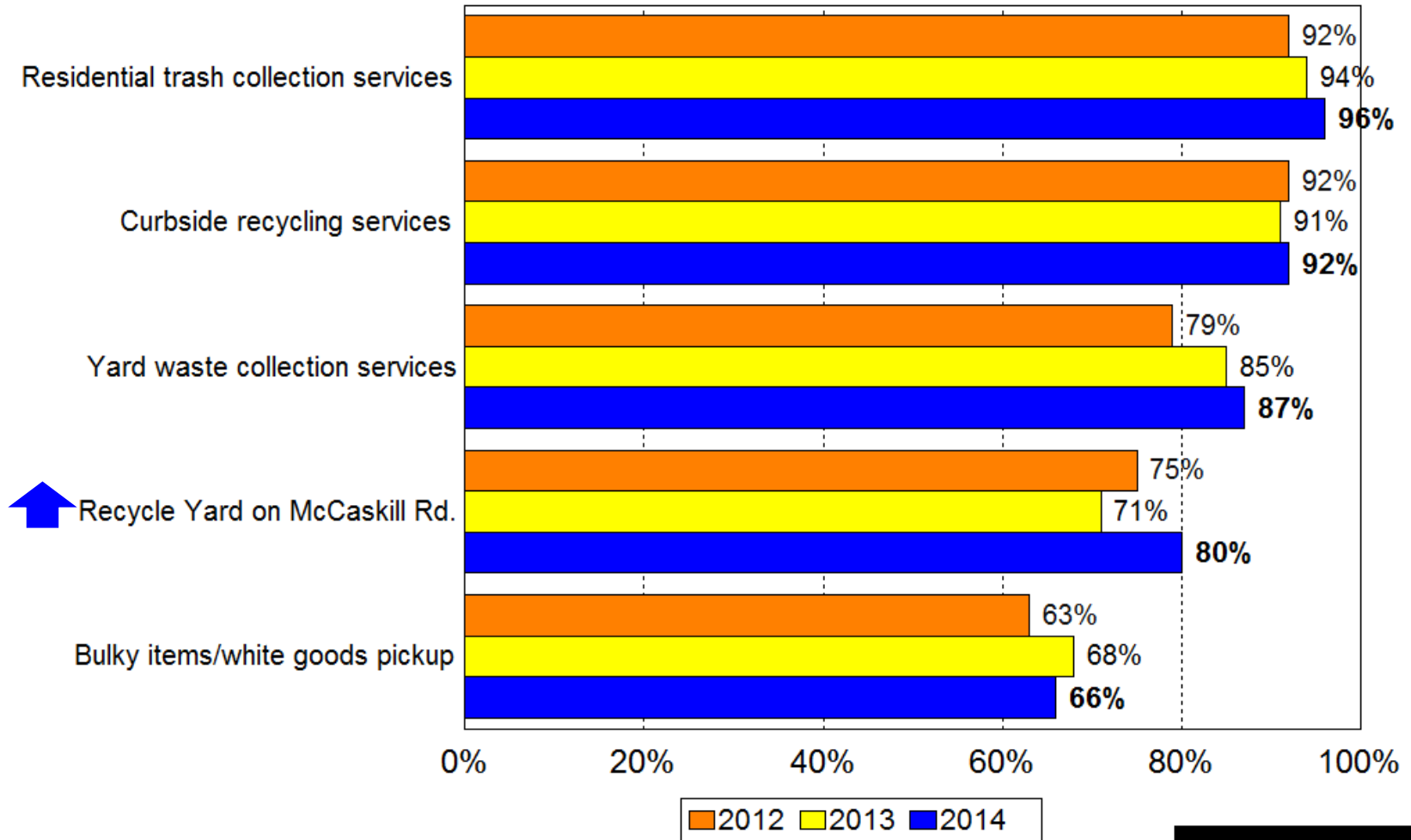
Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

TRENDS

Significant Increases From 2013:  **Significant Decreases From 2013:** 

Q13. Satisfaction with Solid Waste Services - 2012, 2013 & 2014

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding "don't know")



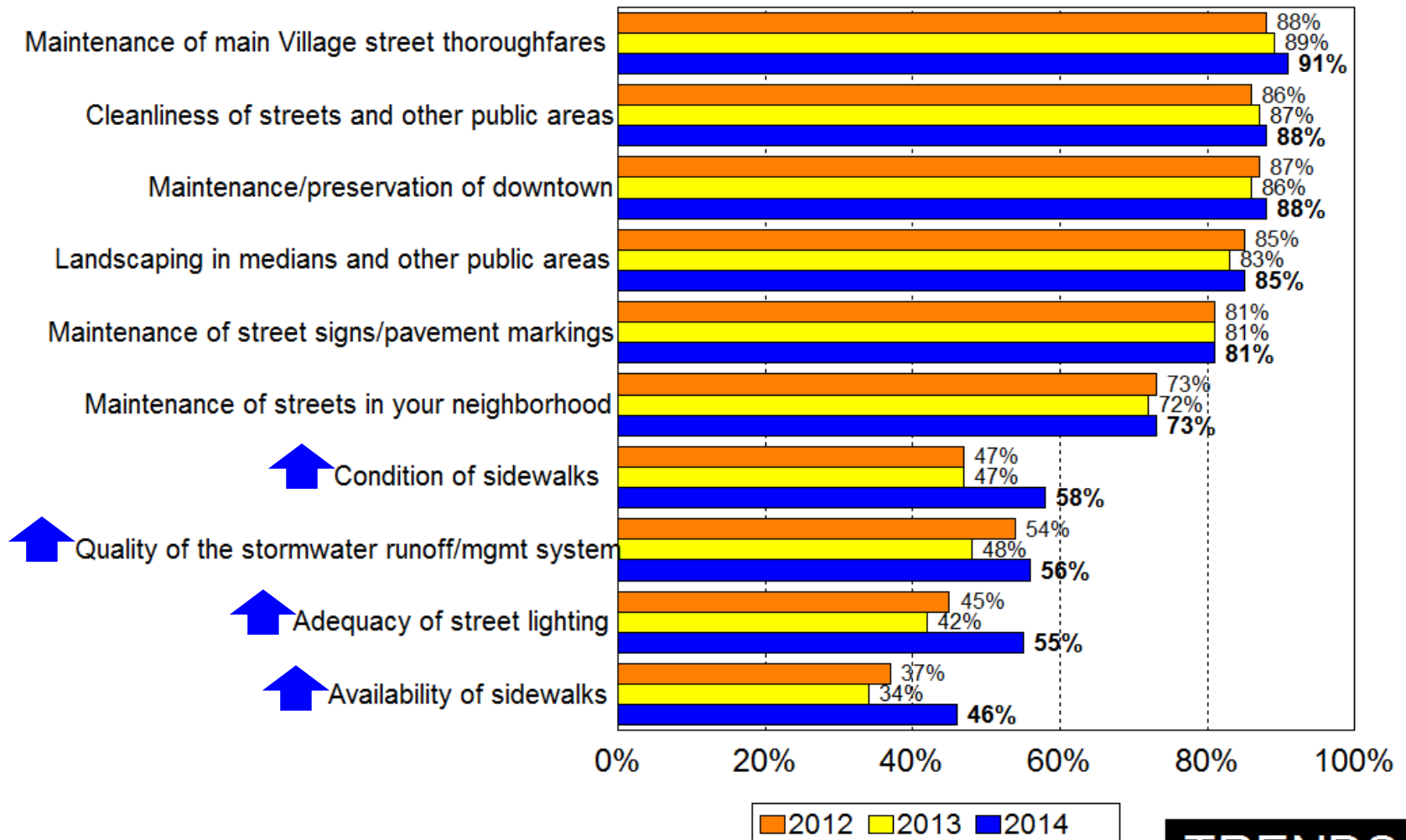
Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

TRENDS

Significant Increases From 2013: ↑ **Significant Decreases From 2013:** ↓

Q14. Satisfaction with Various Aspect of Public Services - 2012, 2013 & 2014

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding "don't know")



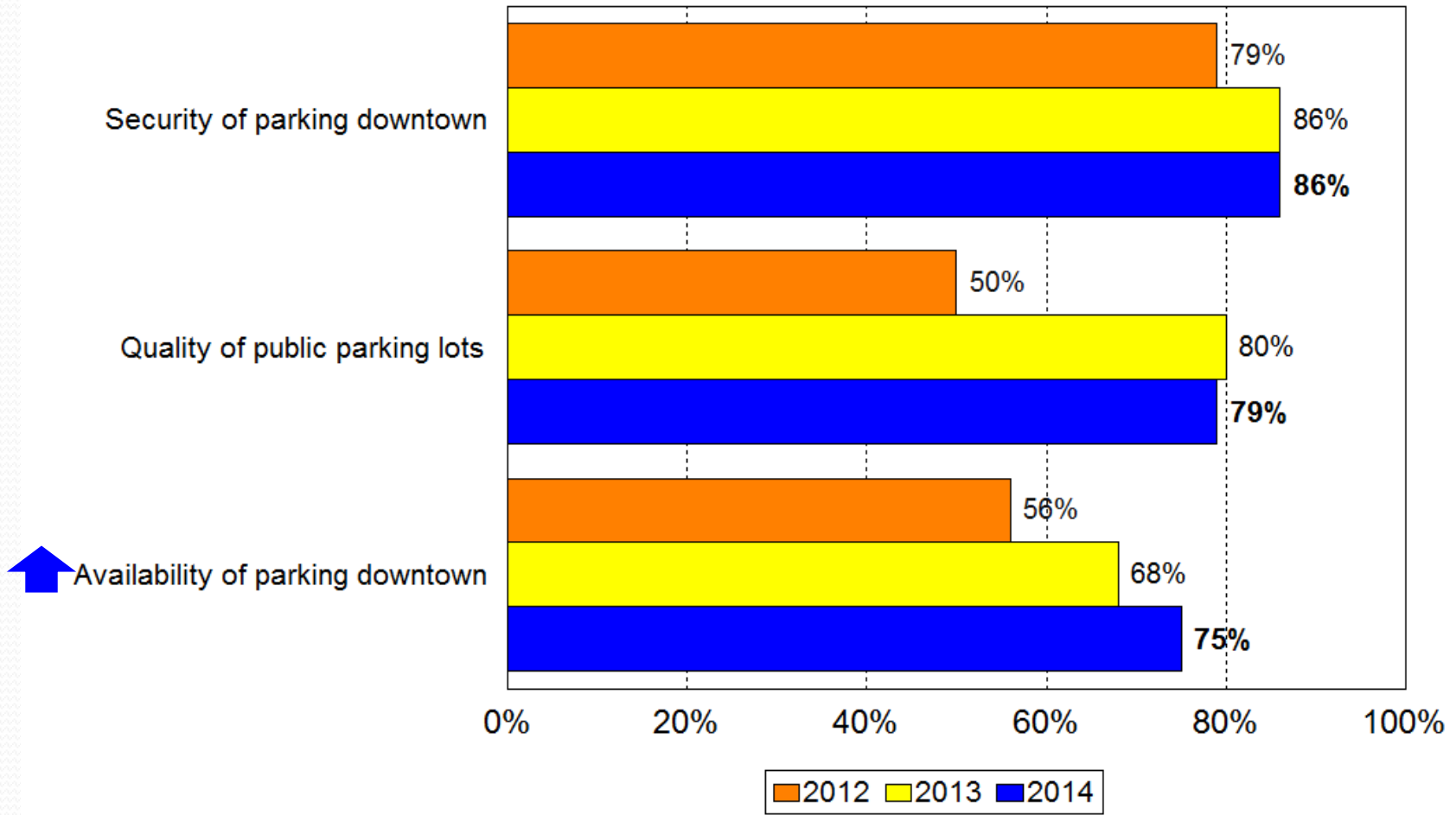
Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

TRENDS

Significant Increases From 2013: ↑ **Significant Decreases From 2013:** ↓

Q17. Satisfaction with Various Aspects of Downtown Parking - 2012, 2013 & 2014

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding "don't know")



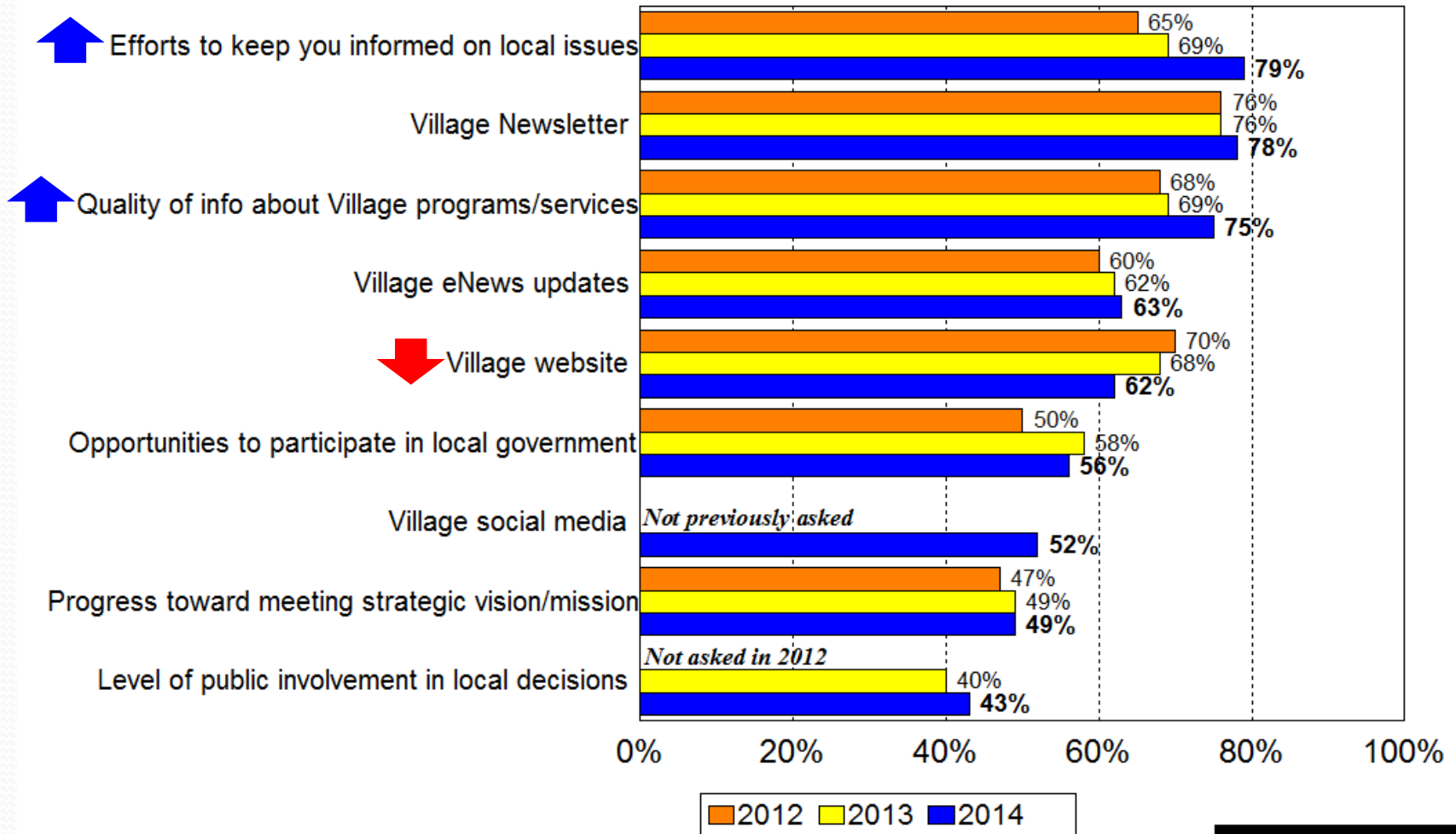
Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

TRENDS

Significant Increases From 2013: ↑ **Significant Decreases From 2013:** ↓

Q18. Satisfaction with Public Communication and Outreach - 2012, 2013 & 2014

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding "don't know")



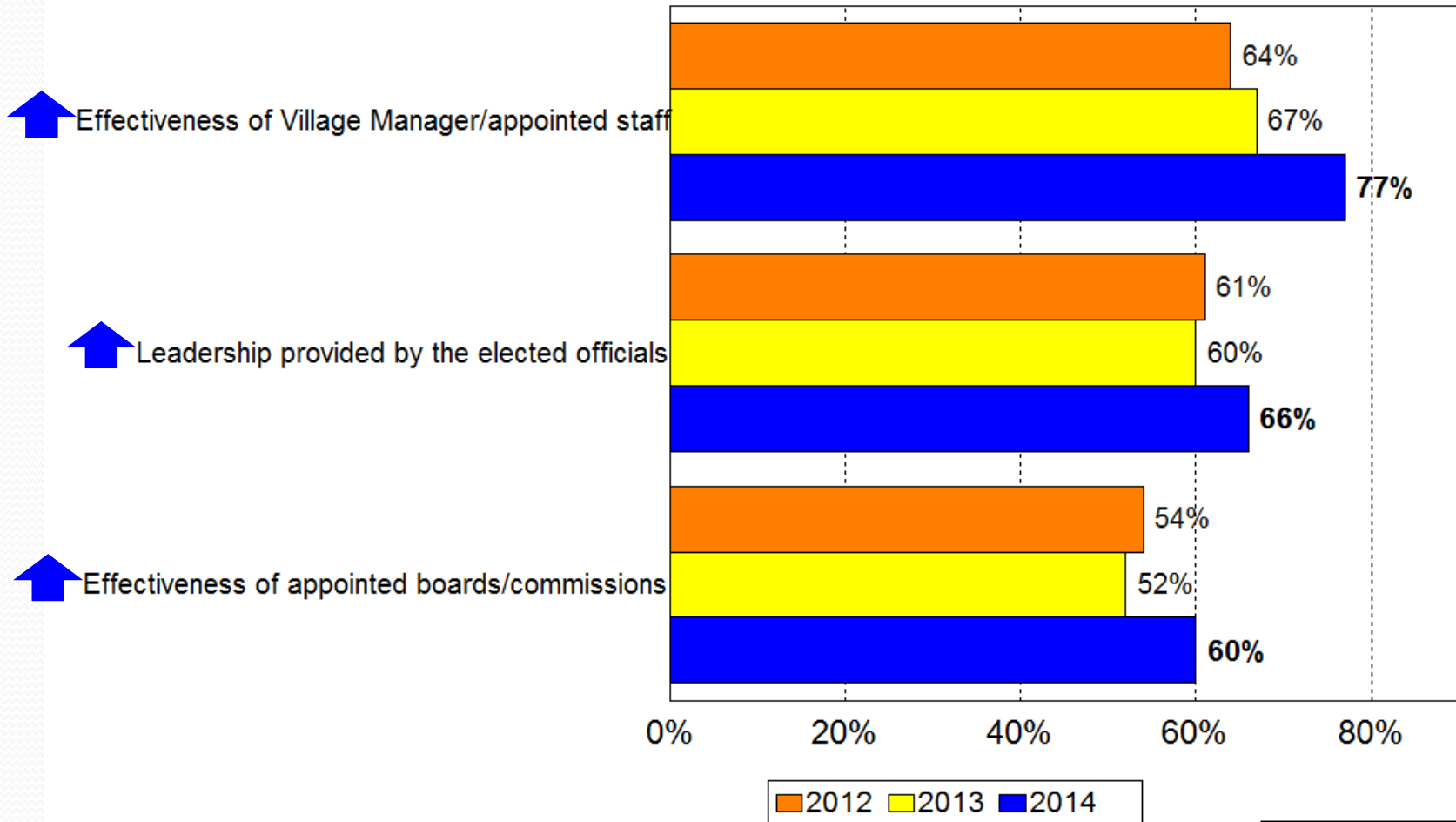
Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

TRENDS

Significant Increases From 2013: ↑ Significant Decreases From 2013: ↓

Q23. Satisfaction with Village Leadership - 2012, 2013 & 2014

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding "don't know")



Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

TRENDS

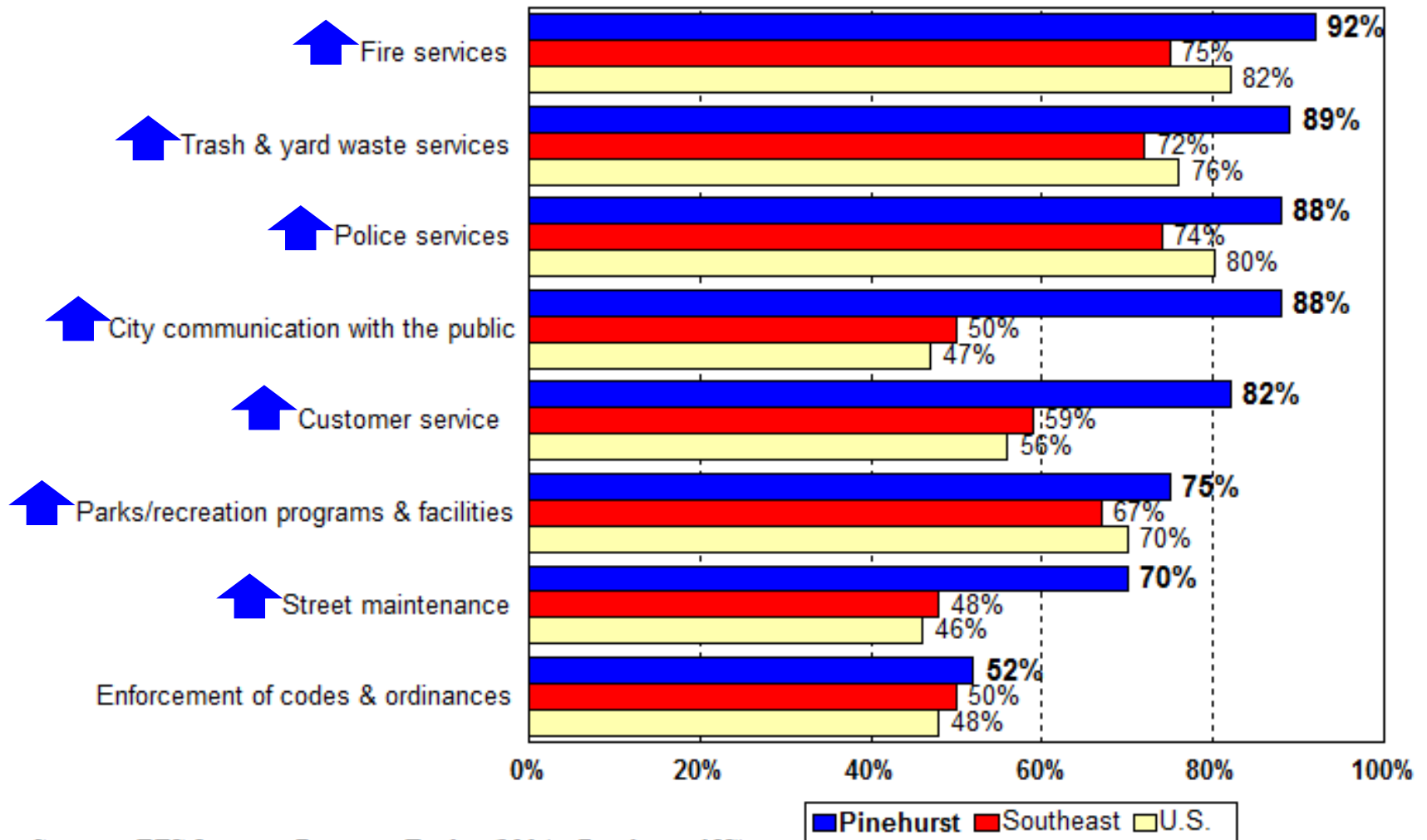
Significant Increases From 2013: ↑ **Significant Decreases From 2013:** ↓

Major Finding #3

**Pinehurst Is Setting the Standard
for Service Delivery Compared to
Other Communities**

Overall Satisfaction with Various Community Services Pinehurst vs. Southeast 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 don't knows)



Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

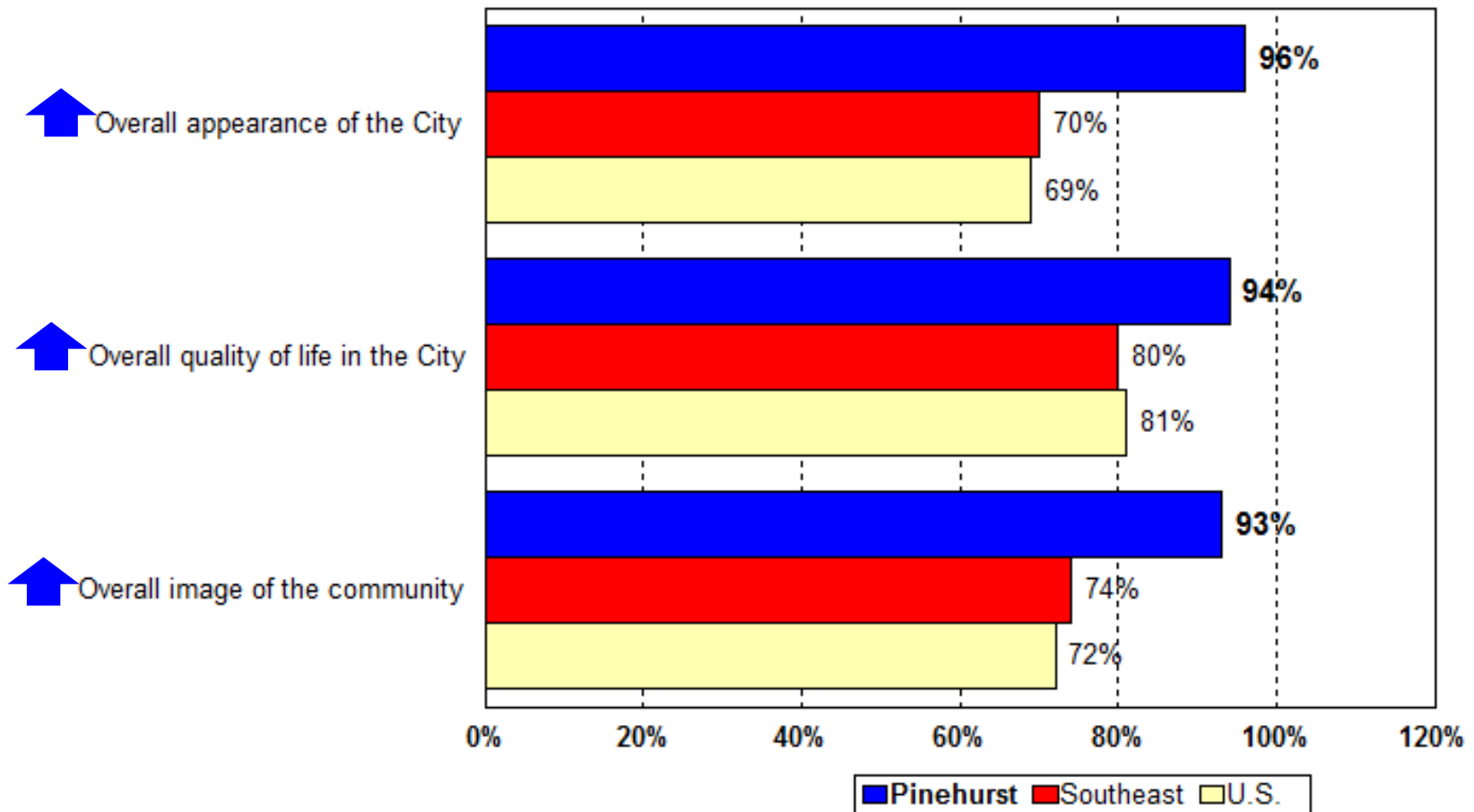
Significantly Higher: ↑

Significantly Lower: ↓

Satisfaction with Issues that Influence Perceptions of the Village

Pinehurst vs. Southeast 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 don't knows)



Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

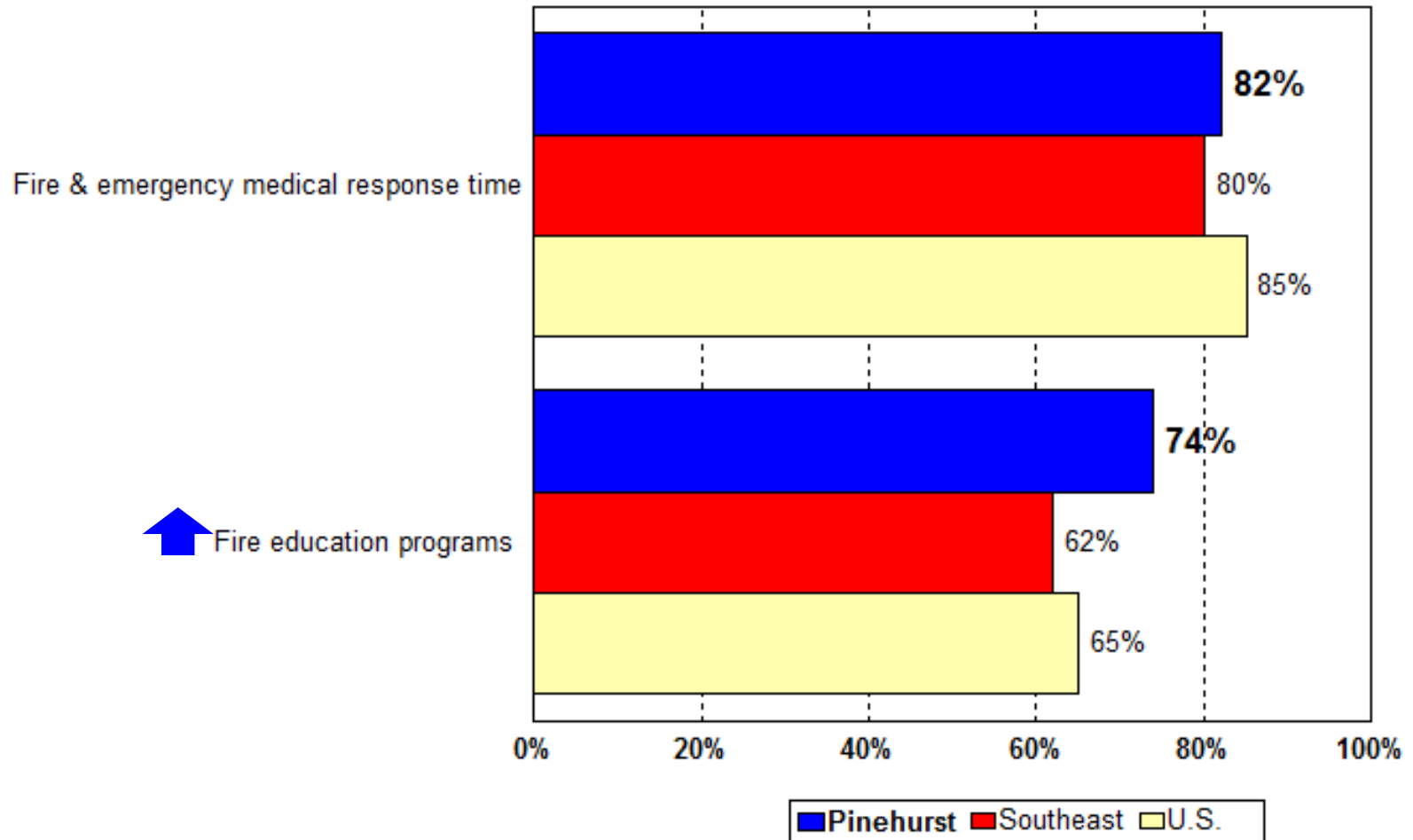
Significantly Higher: ↑

Significantly Lower: ↓

Overall Satisfaction with Fire and Ambulance Services

Pinehurst vs. Southeast 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 don't knows)



Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

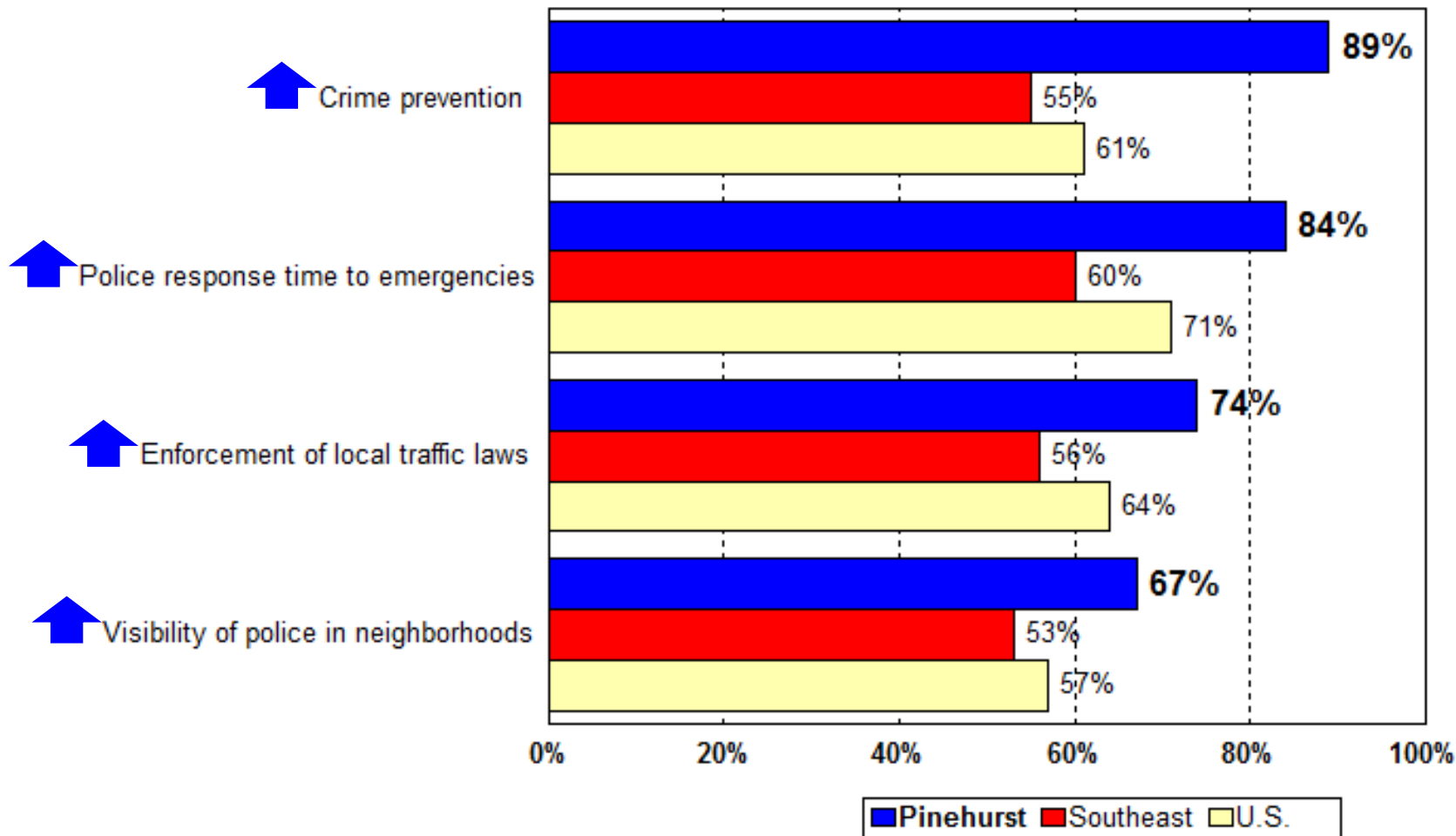
Significantly Higher: 

Significantly Lower: 

Overall Satisfaction with Police Services

Pinehurst vs. Southeast 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 don't knows)



Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

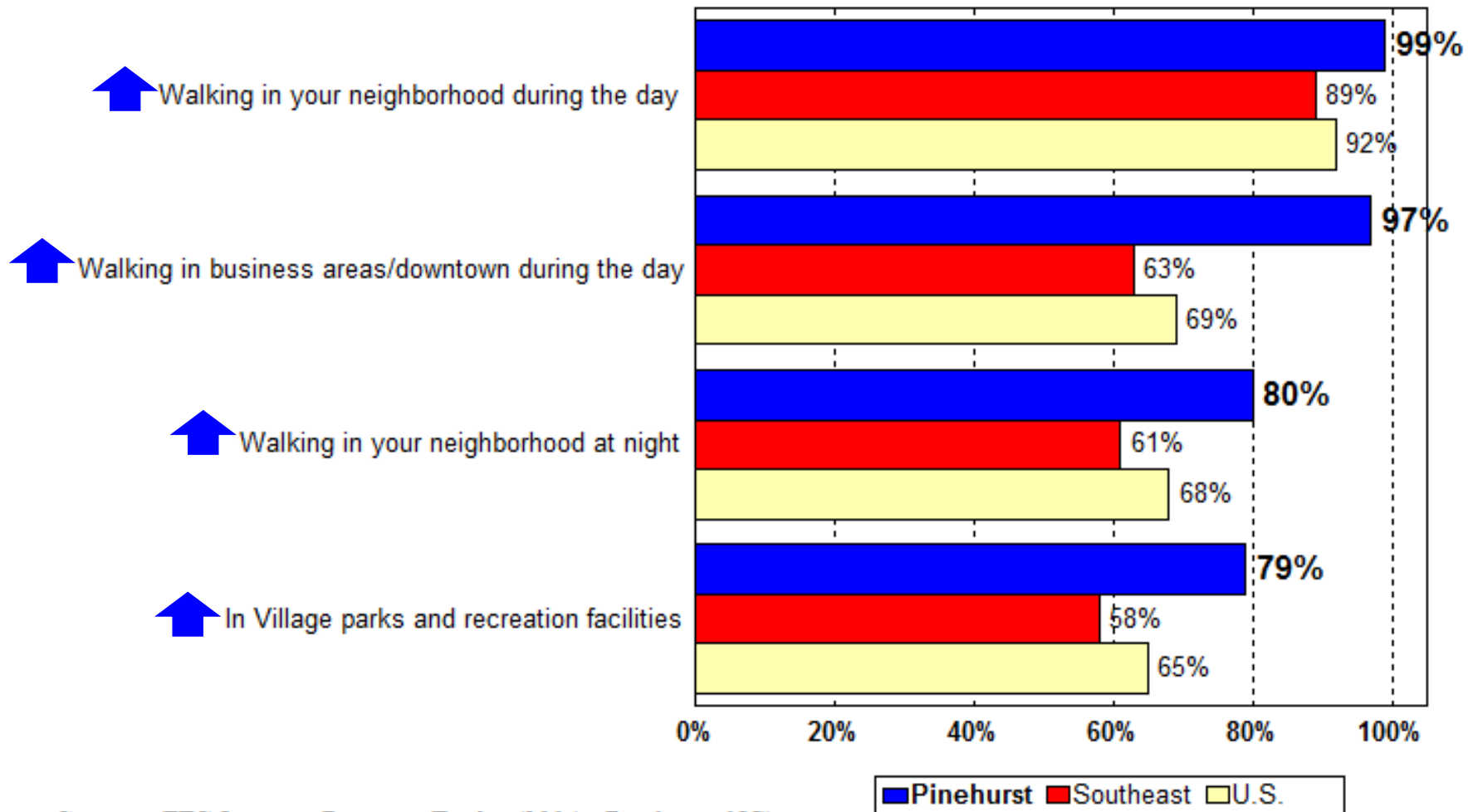
Significantly Higher: ↑

Significantly Lower: ↓

How Safe Residents Feel in Their Community

Pinehurst vs. Southeast vs. the U.S

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)



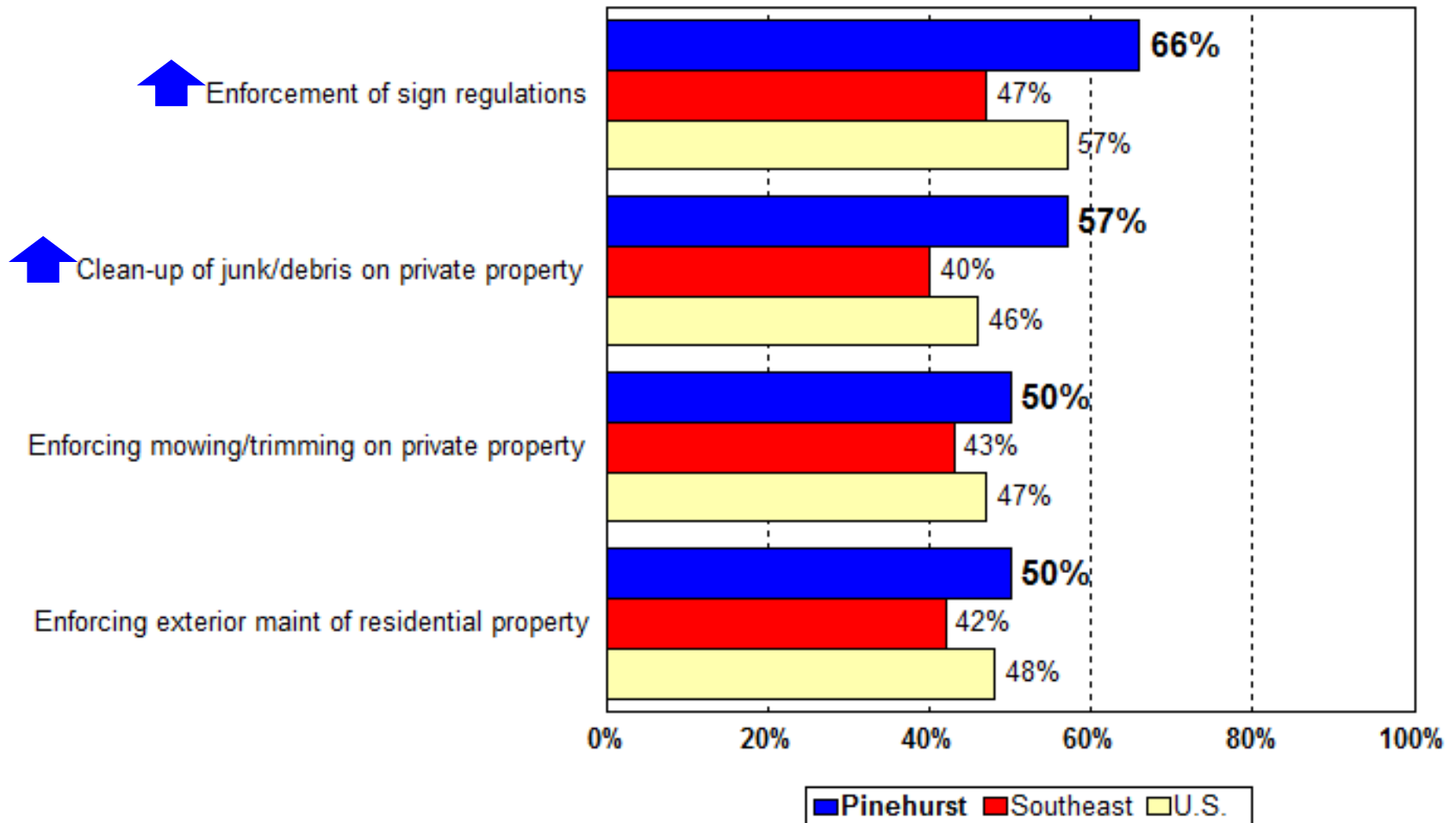
Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

Significantly Higher: ↑

Significantly Lower: ↓

Overall Satisfaction with Code Enforcement Pinehurst vs. Southeast 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 don't knows)



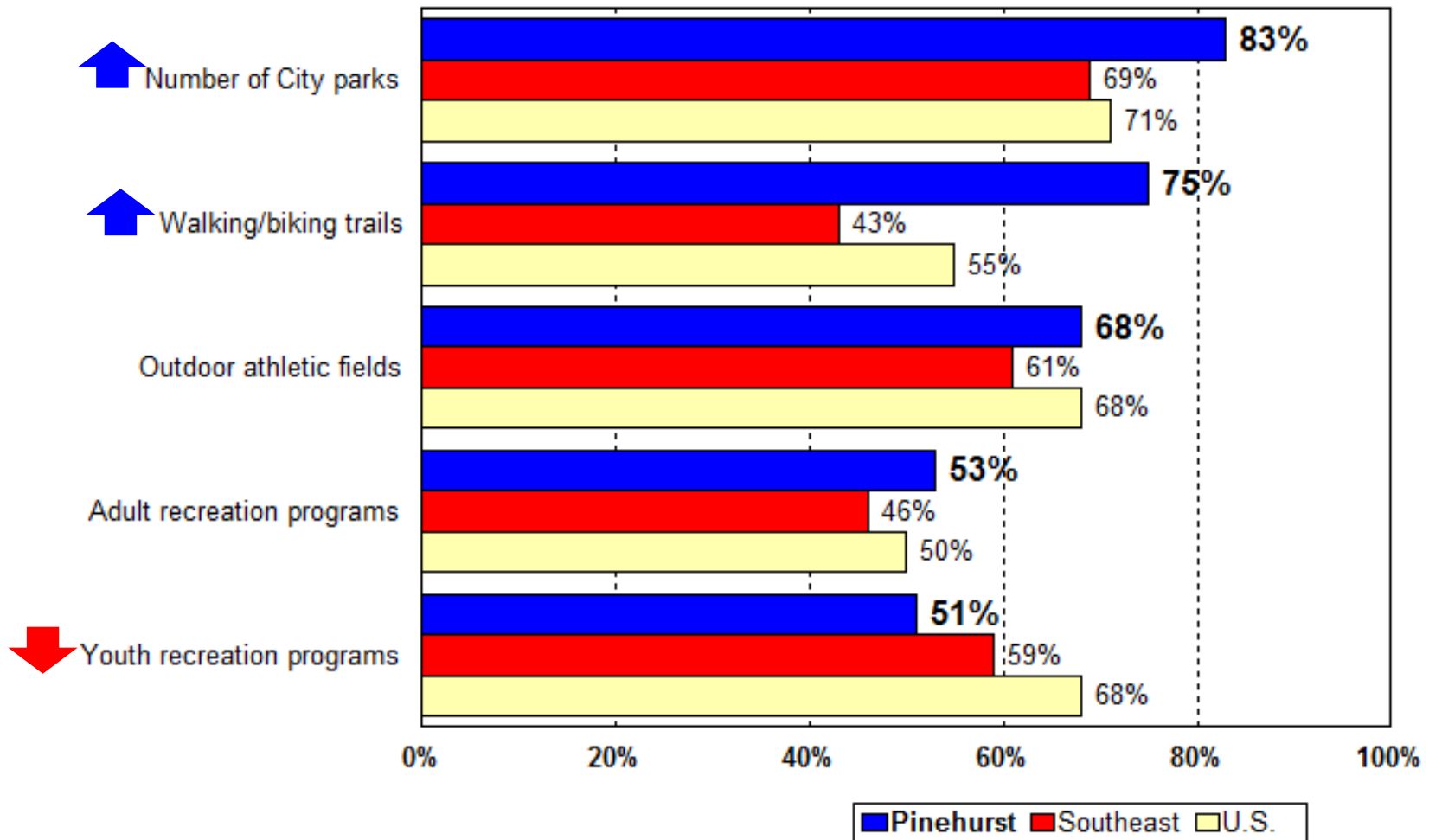
Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

Significantly Higher: ↑

Significantly Lower: ↓

Overall Satisfaction with Parks and Recreation Pinehurst vs. Southeast 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 don't knows)



Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

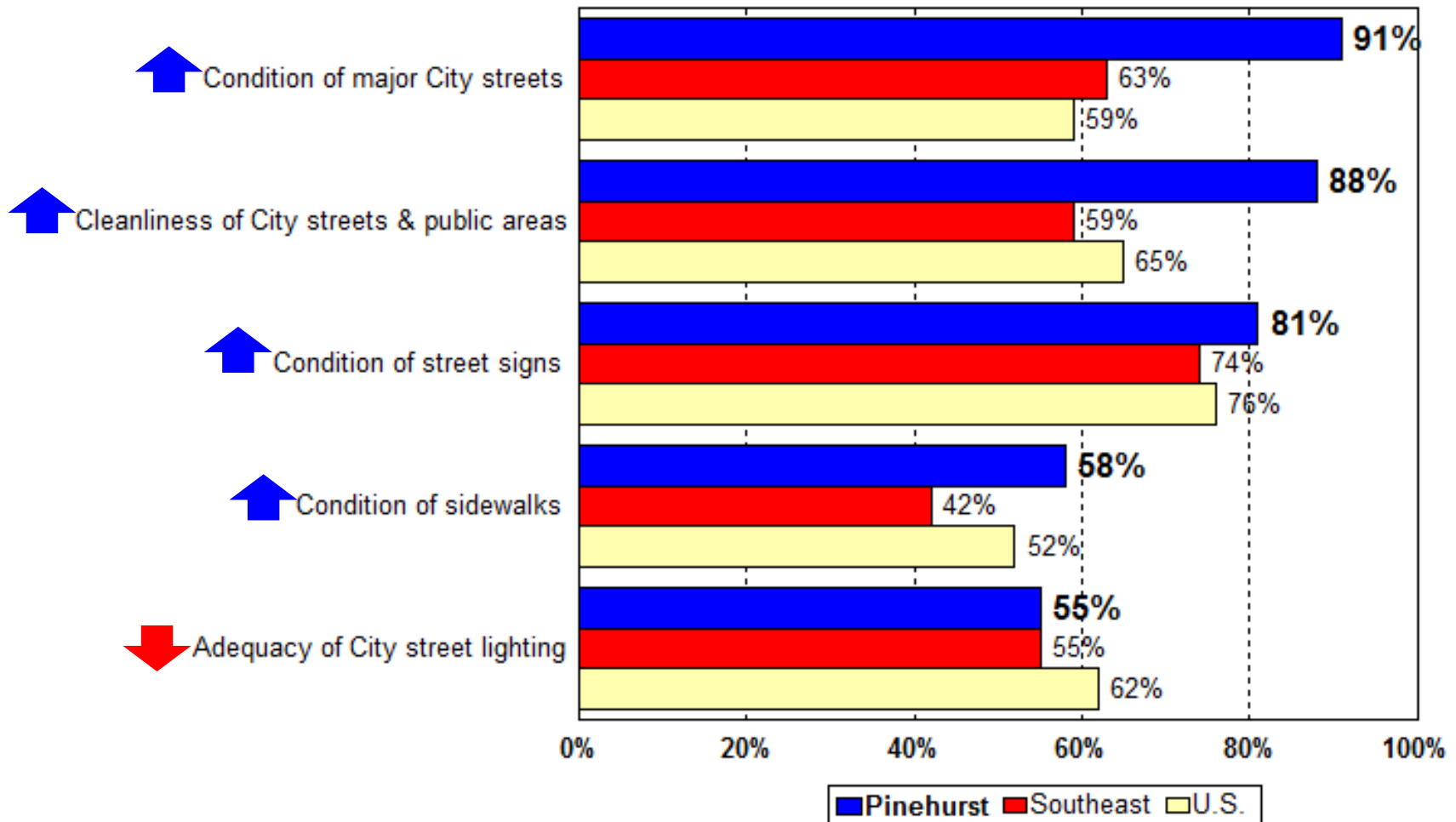
Significantly Higher: ↑

Significantly Lower: ↓

Overall Satisfaction with Maintenance

Pinehurst vs. Southeast 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 don't knows)



Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

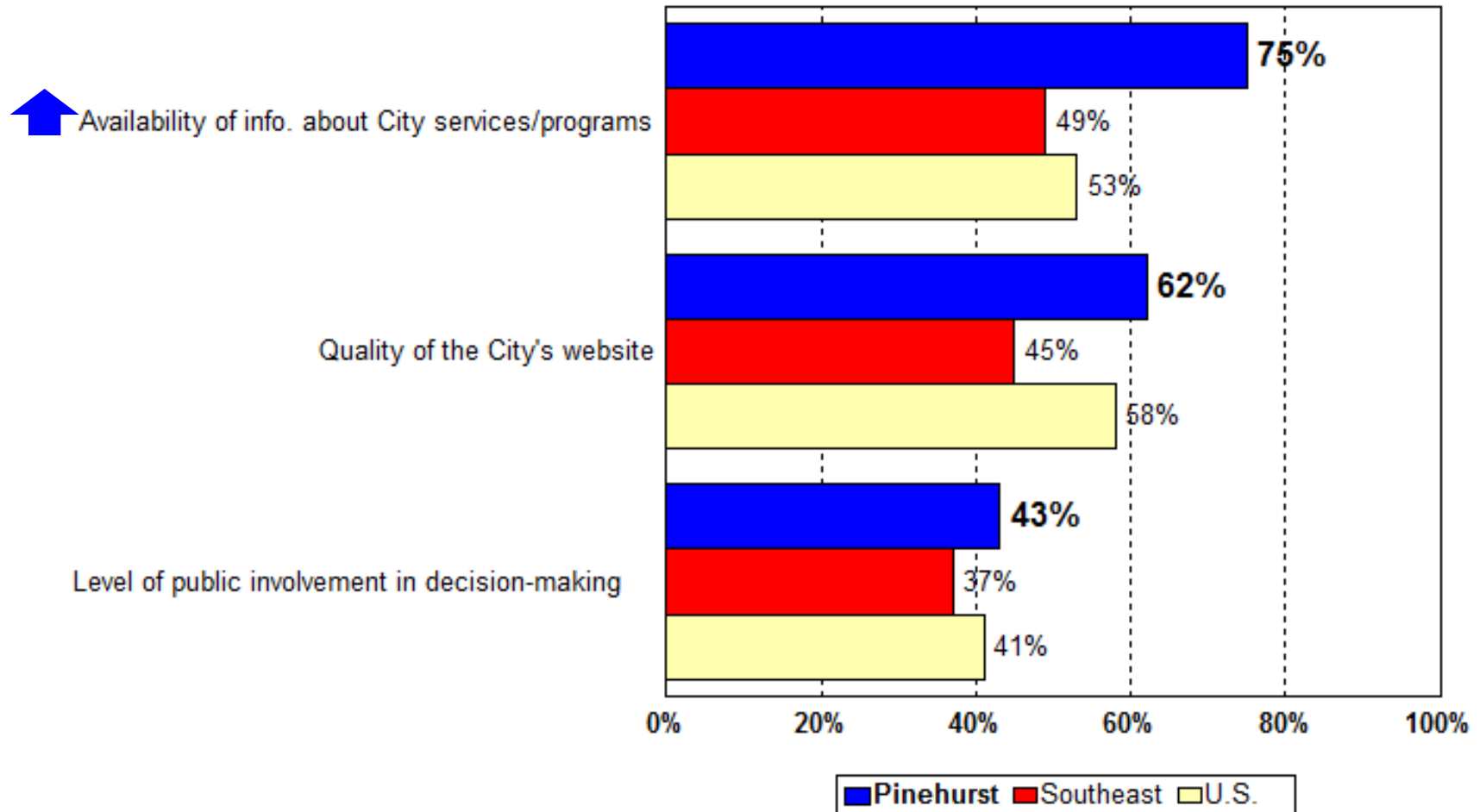
Significantly Higher: ↑

Significantly Lower: ↓

Overall Satisfaction with Communication

Pinehurst vs. Southeast 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 don't knows)



Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

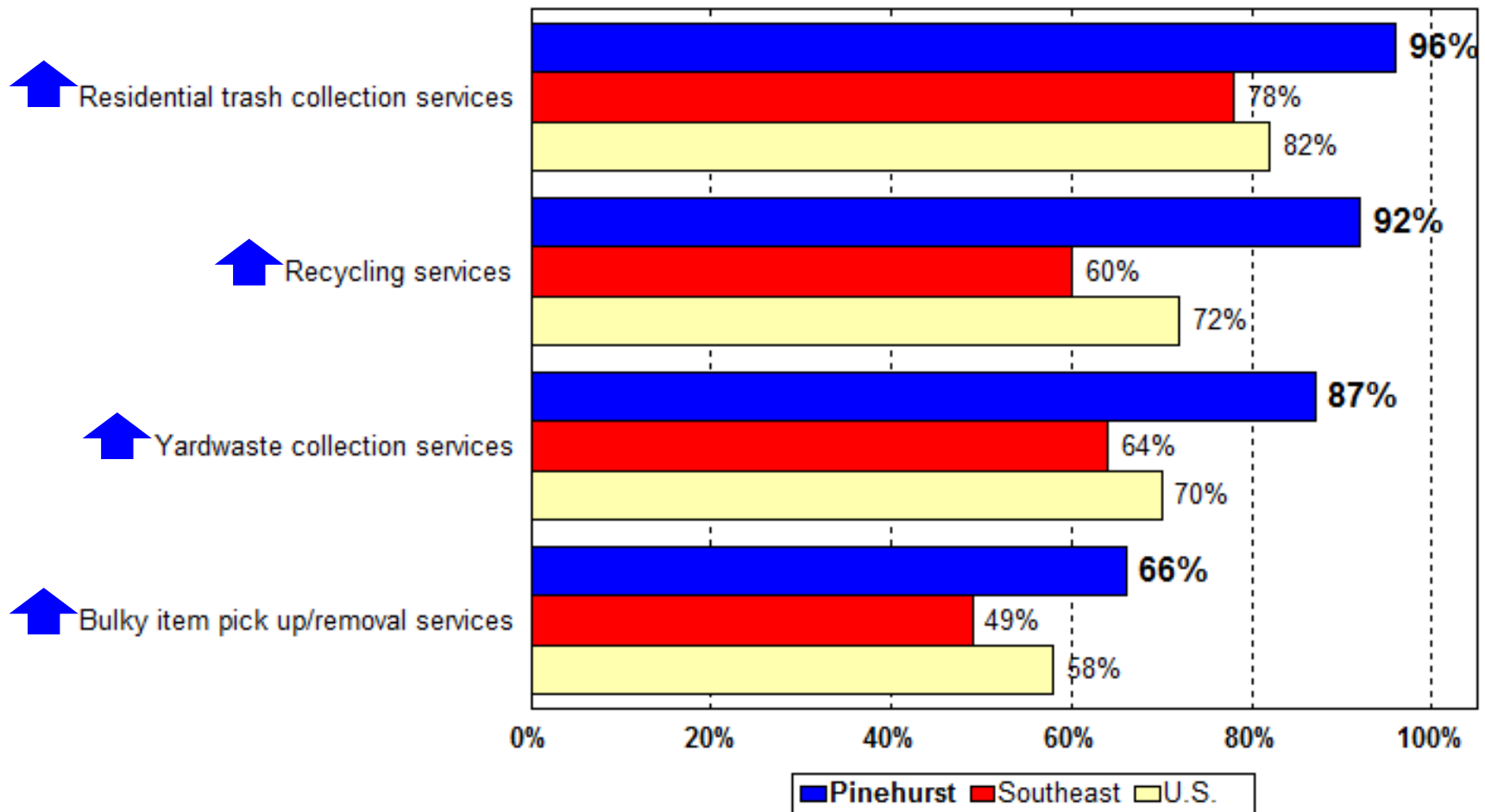
Significantly Higher: ↑

Significantly Lower: ↓

Overall Satisfaction with Utility Services

Pinehurst vs. Southeast 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 don't knows)



Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

Significantly Higher: ↑

Significantly Lower: ↓

Major Finding #4

Priorities for Investment

Importance-Satisfaction Rating

Village of Pinehurst, NC

OVERALL

| Category of Service | Most Important % | Most Important Rank | Satisfaction % | Satisfaction Rank | Importance-Satisfaction Rating | I-S Rating Rank |
|---|------------------|---------------------|----------------|-------------------|--------------------------------|-----------------|
| <u>High Priority (IS .10 - .20)</u> | | | | | | |
| Enforcement of Village codes & ordinances | 33% | 4 | 52% | 11 | 0.1584 | 1 |
| Efforts at maintaining quality of neighborhoods | 45% | 1 | 69% | 9 | 0.1395 | 2 |
| Street & right-of-way maintenance | 35% | 3 | 70% | 8 | 0.1050 | 3 |
| <u>Medium Priority (IS <.10)</u> | | | | | | |
| Promotion of natural resource conservation | 18% | 7 | 68% | 10 | 0.0576 | 4 |
| Parks & recreation facilities | 19% | 6 | 77% | 6 | 0.0437 | 5 |
| Police services | 36% | 2 | 88% | 4 | 0.0432 | 6 |
| Parks & recreation programs | 15% | 8 | 72% | 7 | 0.0420 | 7 |
| Fire services | 22% | 5 | 92% | 1 | 0.0176 | 8 |
| Village communication with residents | 14% | 9 | 88% | 3 | 0.0168 | 9 |
| Customer service provided by Village employees | 8% | 11 | 82% | 5 | 0.0144 | 10 |
| Solid waste services | 12% | 10 | 89% | 2 | 0.0132 | 11 |

Overall Priorities: 

Importance-Satisfaction Rating

Village of Pinehurst, NC

Public Safety Services

| Category of Service | Most Important % | Most Important Rank | Satisfaction % | Satisfaction Rank | Importance-Satisfaction Rating | I-S Rating Rank |
|---|------------------|---------------------|----------------|-------------------|--------------------------------|-----------------|
| <u>Medium Priority (IS <.10)</u> | | | | | | |
| Frequency that police officers patrol your neighborhood | 28% | 2 | 67% | 7 | 0.0924 | 1 |
| Village efforts to prevent crimes | 53% | 1 | 89% | 1 | 0.0583 | 2 |
| Enforcement of local traffic laws | 20% | 5 | 74% | 5 | 0.0520 | 3 |
| How quickly police respond to emergencies | 26% | 3 | 84% | 3 | 0.0416 | 4 |
| How quickly fire personnel respond to emergencies | 21% | 4 | 82% | 4 | 0.0378 | 5 |
| Fire prevention & education programs | 12% | 6 | 74% | 6 | 0.0312 | 6 |
| Professionalism of Police officers | 12% | 7 | 85% | 2 | 0.0180 | 7 |

Public Safety Priorities: 

Importance-Satisfaction Rating

Village of Pinehurst, NC

Cultural and Recreation Services

| Category of Service | Most Important % | Most Important Rank | Satisfaction % | Satisfaction Rank | Importance-Satisfaction Rating | I-S Rating Rank |
|---|------------------|---------------------|----------------|-------------------|--------------------------------|-----------------|
| <u>High Priority (IS .10 - .20)</u> | | | | | | |
| Availability of recreation indoor facilities | 19% | 6 | 42% | 14 | 0.1102 | 1 |
| Range of activities at parks & recreation | 20% | 5 | 48% | 12 | 0.1040 | 2 |
| Village sponsored cultural arts events | 29% | 1 | 65% | 6 | 0.1015 | 3 |
| <u>Medium Priority (IS <.10)</u> | | | | | | |
| Quality of recreation programs for youth | 17% | 8 | 51% | 11 | 0.0833 | 4 |
| Quality of recreation programs for adults | 16% | 9 | 53% | 10 | 0.0752 | 5 |
| Quality of recreation indoor facilities | 13% | 10 | 45% | 13 | 0.0715 | 6 |
| Availability of information about recreation programs | 17% | 7 | 58% | 9 | 0.0714 | 7 |
| Condition of walking/greenway trails | 22% | 4 | 70% | 4 | 0.0660 | 8 |
| Availability of walking/greenway trails | 22% | 3 | 75% | 3 | 0.0550 | 9 |
| Quality of Village parks | 22% | 2 | 85% | 1 | 0.0330 | 10 |
| Customer service provided by parks & recreation staff | 8% | 11 | 60% | 8 | 0.0320 | 11 |
| Quality of outdoor athletic fields & facilities | 7% | 12 | 68% | 5 | 0.0224 | 12 |
| Availability of outdoor athletic fields & facilities | 5% | 14 | 62% | 7 | 0.0190 | 13 |
| Number of Village parks | 6% | 13 | 83% | 2 | 0.0102 | 14 |

Cultural and Recreation Services Priorities: 

Importance-Satisfaction Rating

Village of Pinehurst, NC

PUBLIC SERVICES

| Category of Service | Most Important % | Most Important Rank | Satisfaction % | Satisfaction Rank | Importance-Satisfaction Rating | I-S Rating Rank |
|--|------------------|---------------------|----------------|-------------------|--------------------------------|-----------------|
| <u>High Priority (IS.10 - .20)</u> | | | | | | |
| Availability of sidewalks | 33% | 3 | 46% | 10 | 0.1782 | 1 |
| Adequacy of street lighting | 39% | 1 | 55% | 9 | 0.1755 | 2 |
| Maintenance of streets in your neighborhood | 38% | 2 | 73% | 6 | 0.1026 | 3 |
| Quality of stormwater runoff/management system | 23% | 5 | 56% | 8 | 0.1012 | 4 |
| <u>Medium Priority (IS < .10)</u> | | | | | | |
| Condition of sidewalks | 10% | 10 | 58% | 7 | 0.0420 | 5 |
| Maintenance/preservation of Downtown | 23% | 6 | 88% | 3 | 0.0276 | 6 |
| Overall cleanliness of streets & other public areas | 22% | 7 | 88% | 2 | 0.0264 | 7 |
| Quality of landscaping in medians & other public areas | 17% | 8 | 85% | 4 | 0.0255 | 8 |
| Maintenance of street signs/pavement markings | 13% | 9 | 81% | 5 | 0.0247 | 9 |
| Maintenance of main Village street thoroughfares | 23% | 4 | 91% | 1 | 0.0207 | 10 |

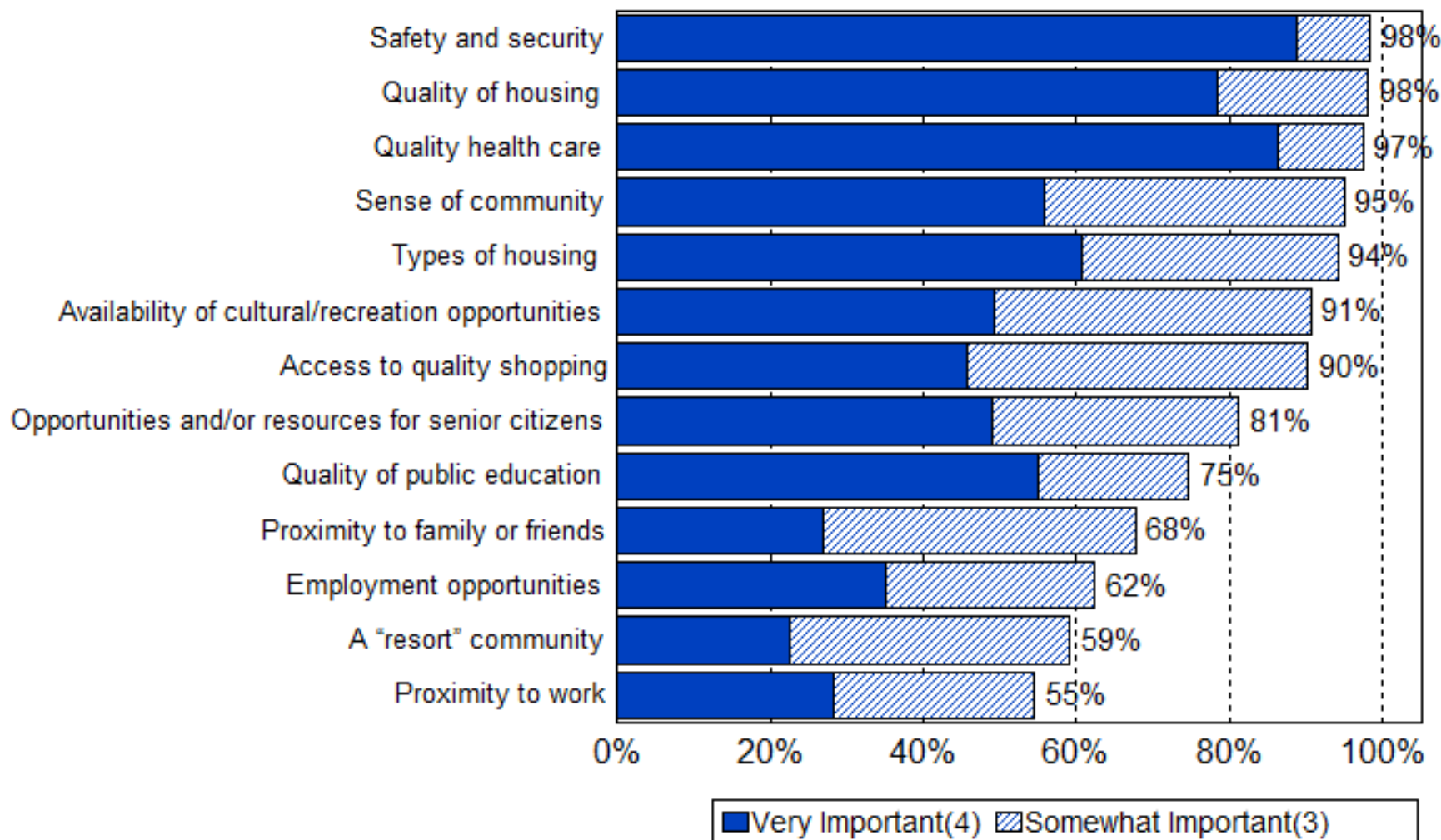
Public Services Priorities:



Other Findings

Q3. Level of Importance of Various Reasons for Choosing to Live in Pinehurst

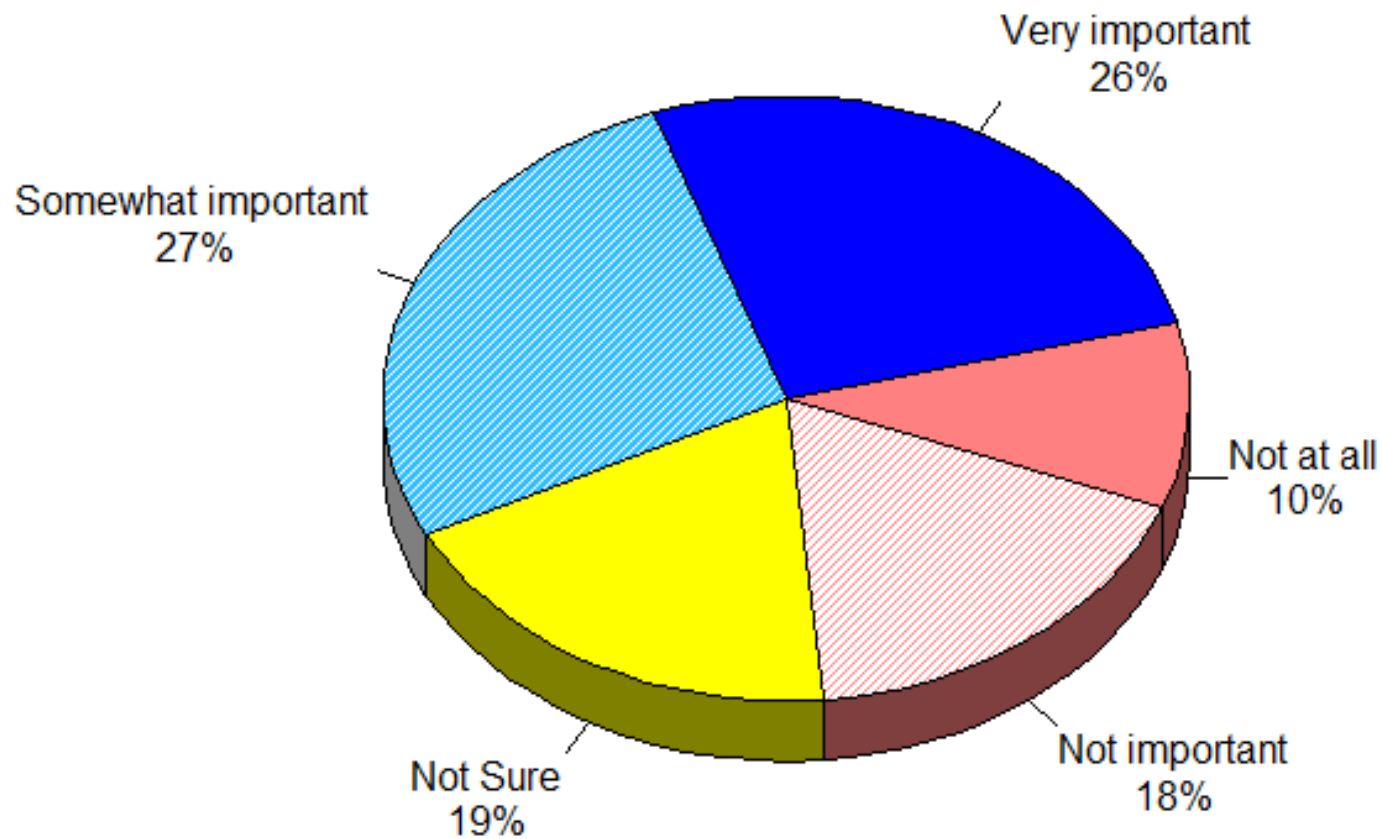
by percentage of respondents who rated the item as a 1 to 4 on a 4-point scale



Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

Q10. How important do you feel it is for the Village to construct a Community Center to provide indoor recreation space for youth and adults?

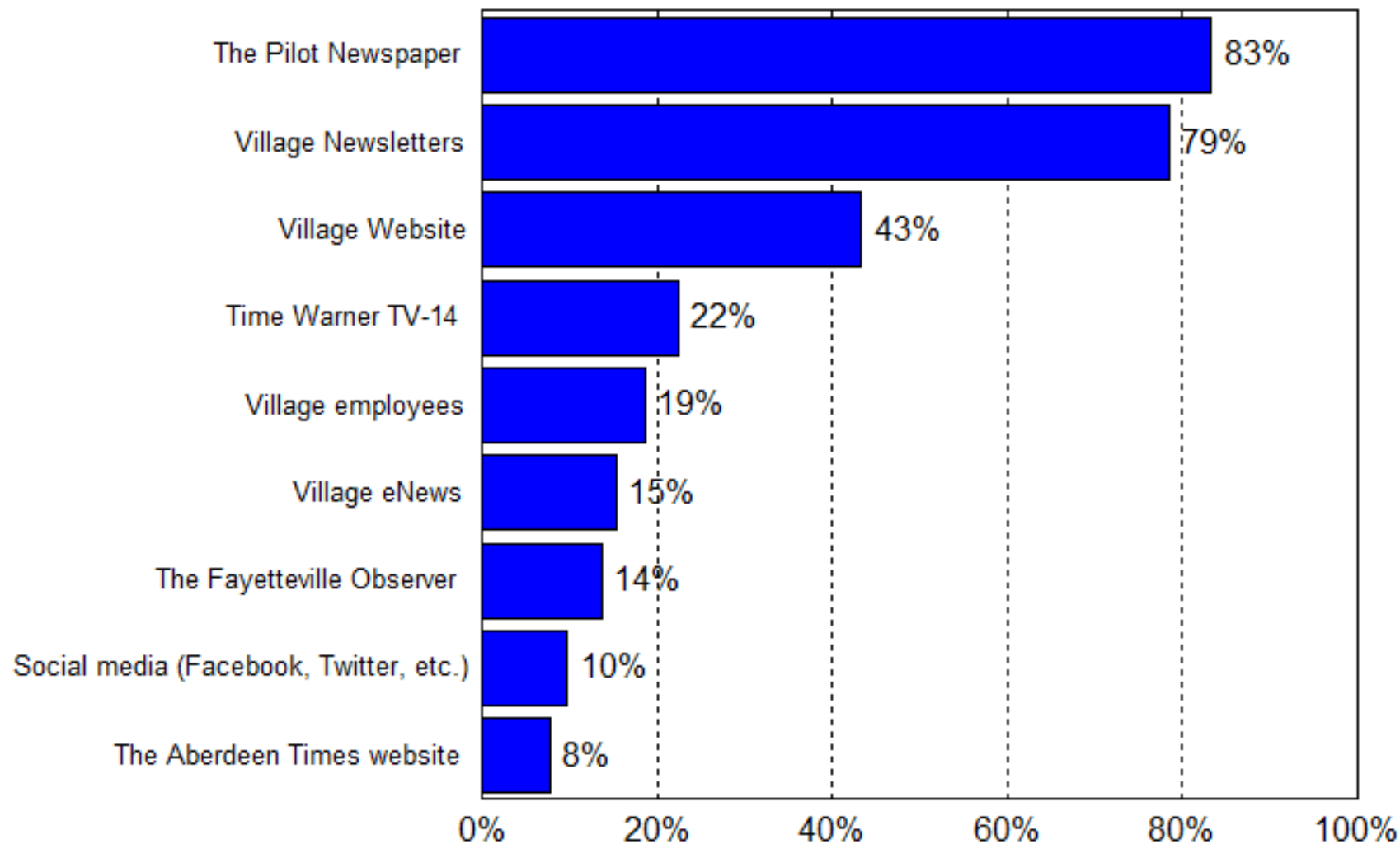
by percentage of respondents



Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

Q19. Which of the following do you use to get information about the Village of Pinehurst?

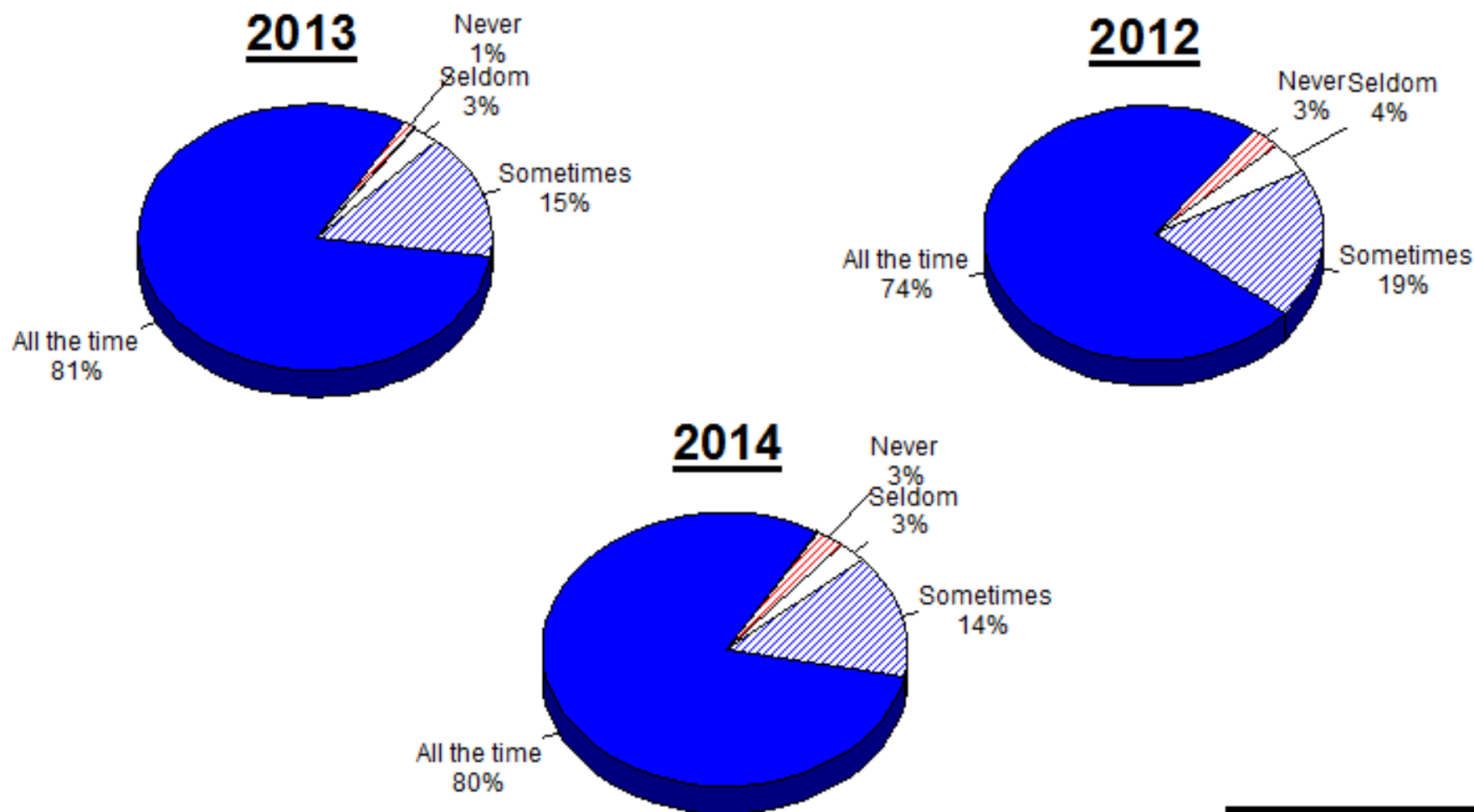
by percentage of respondents (multiple selections could be made)



Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

Q20. How often do you read the Village Newsletter, which is mailed to all residents?

by percentage of respondents



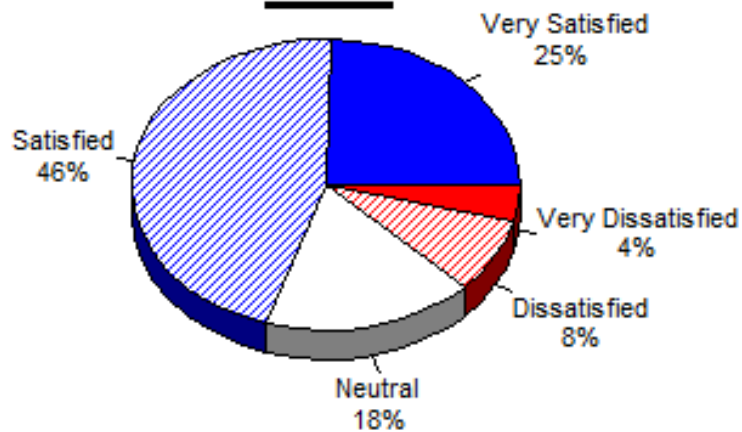
Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

TRENDS

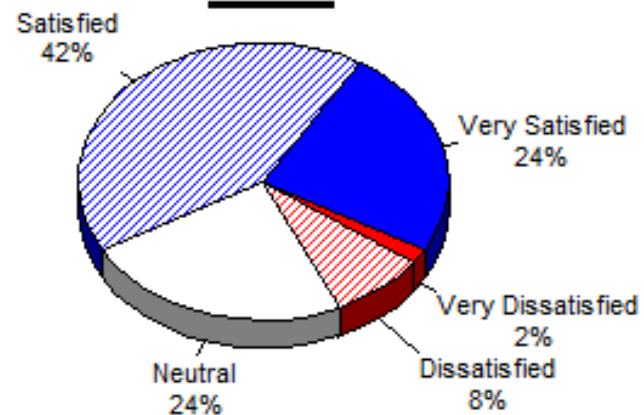
Q22. What is your level of satisfaction with the value you receive for the portion of your property taxes that funds the Village's operating budget?

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

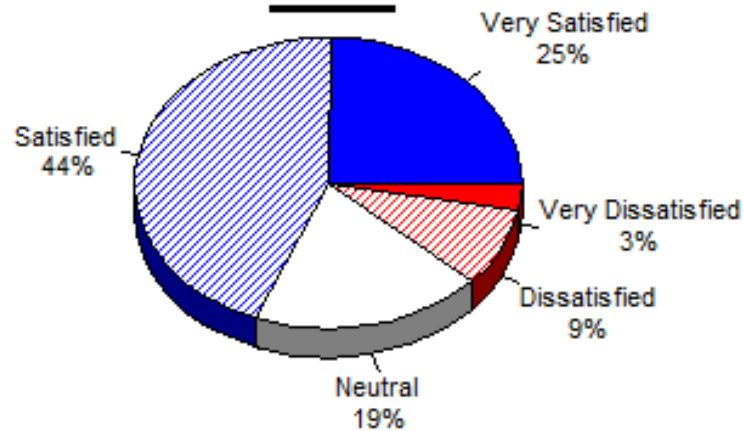
2013



2012



2014

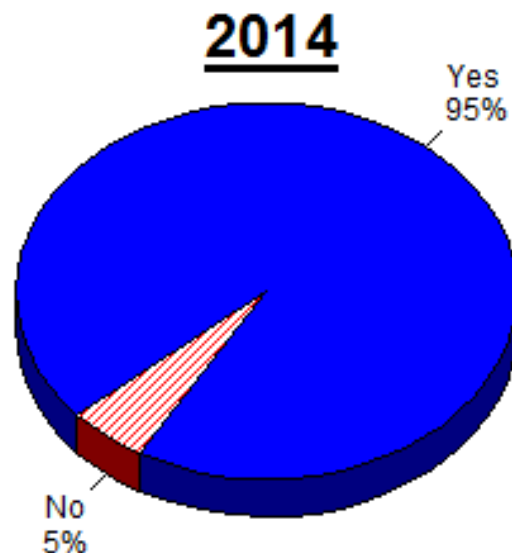
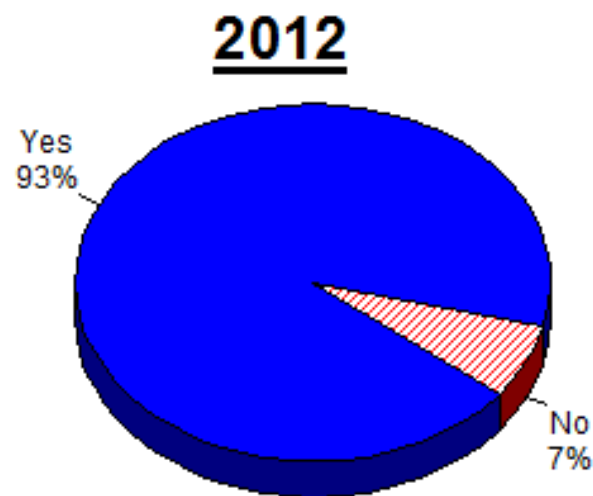
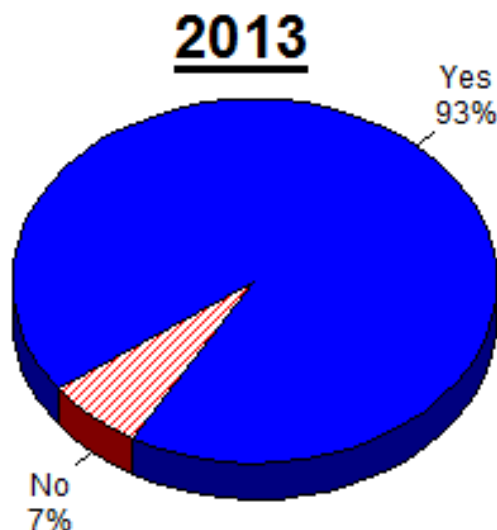


Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

TRENDS

Q24. Would you recommend Pinehurst to others as a place to live?

by percentage of respondents



Source: ETC Institute DirectionFinder (2014 - Pinehurst, NC)

TRENDS

Summary

- **Residents Have a Very Positive Perception of the Village**
 - ❑ 95% would recommend Pinehurst to others as a place to live
 - ❑ 94% rated the overall quality of life in the Village as excellent or good
- **Analysis of Trends**
 - ❑ Overall satisfaction is similar to the 2012 and 2013 surveys
- **Pinehurst is Setting the Standard for Overall Service Delivery Compared to Other Communities**
 - ❑ The Village rated above the National Average in 38 of the 42 areas that were compared
 - ❑ The Village rated significantly above the National Average in 32 of the 42 areas that were compared
- **Overall priorities for improvement over the next 2 years:**
 - ❑ Enforcement of Village codes and ordinances
 - ❑ Efforts at maintaining the quality of neighborhoods
 - ❑ Street and right-of-way maintenance

Questions?

THANK YOU!!