

2015 Business Survey

Findings Report



HISTORY, CHARM, AND SOUTHERN HOSPITALITY _____

conducted for
The Village of
Pinehurst, North Carolina

by

ETC Institute
725 West Frontier
Olathe, Kansas 66061
(913) 829-1215

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Executive Summary

Purpose and Methodology

A business survey was administered for The Village of Pinehurst to businesses located within the Village limits during August and September of 2015. The survey was administered for the fourth time as part of an effort to assess business satisfaction with the quality of Village services and to measure trends from the results of previous surveys. The information gathered will help the Village address issues affecting the business community by measuring change over time.

Methodology. A four-page survey was mailed to businesses in the Village of Pinehurst. Approximately 10 days after surveys were mailed, businesses who received the survey were contacted by phone. Those who indicated they had not returned the survey were given the option of completing it by phone. The goal was to receive at least 75 completed surveys. This goal was accomplished, with a total of 77 businesses completing the survey.

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

This report contains:

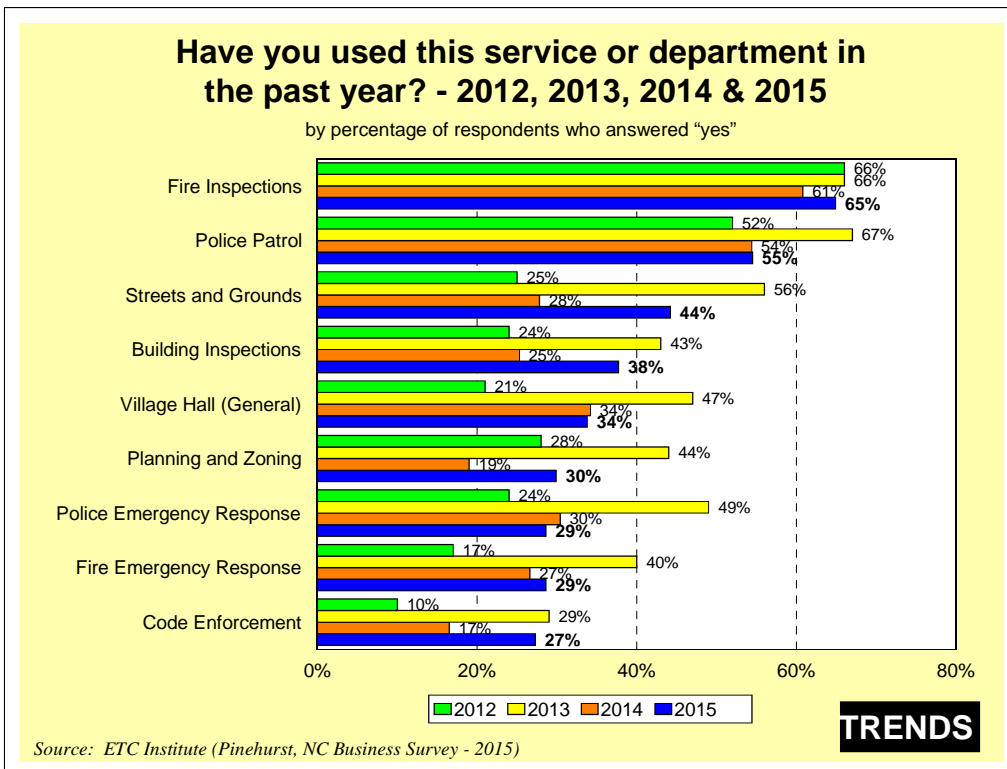
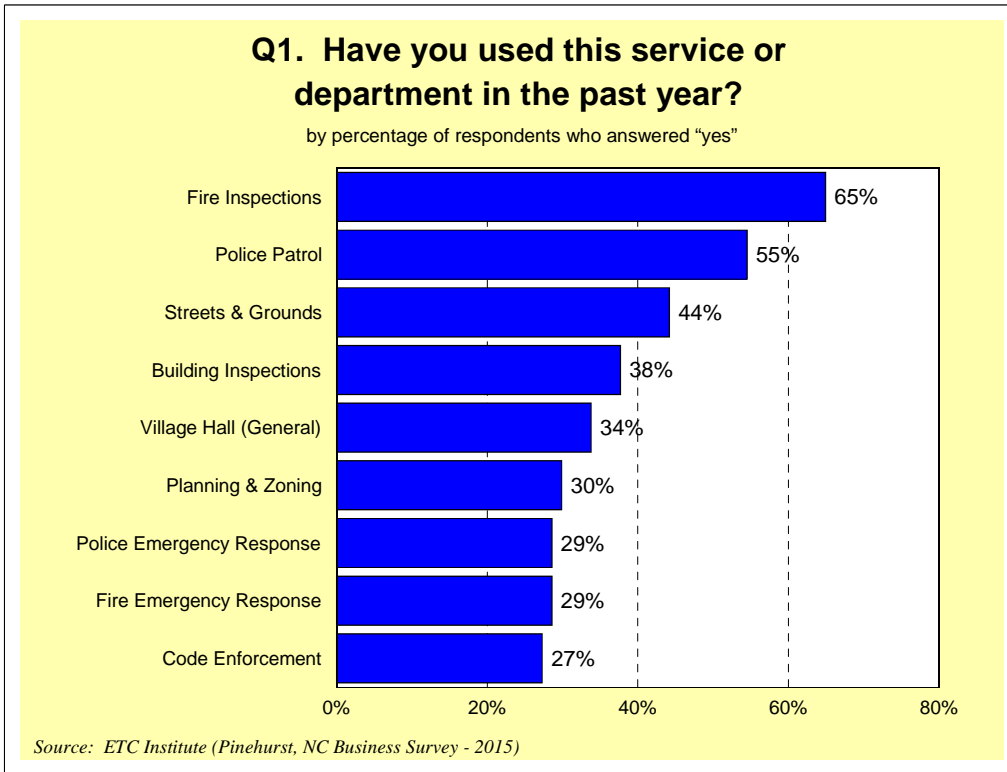
- a summary of the methodology for administering the survey and major findings
- charts and graphs for each question on the survey
- importance-satisfaction analysis
- tabular data that show the results for each question on the survey
- a copy of the survey instrument.

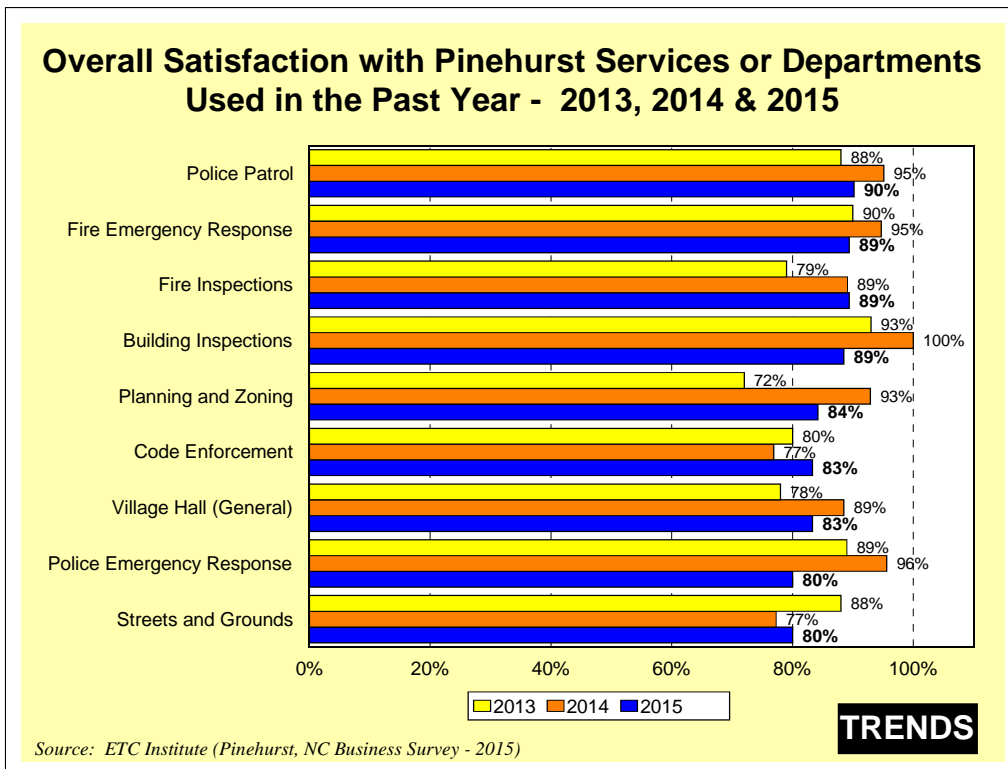
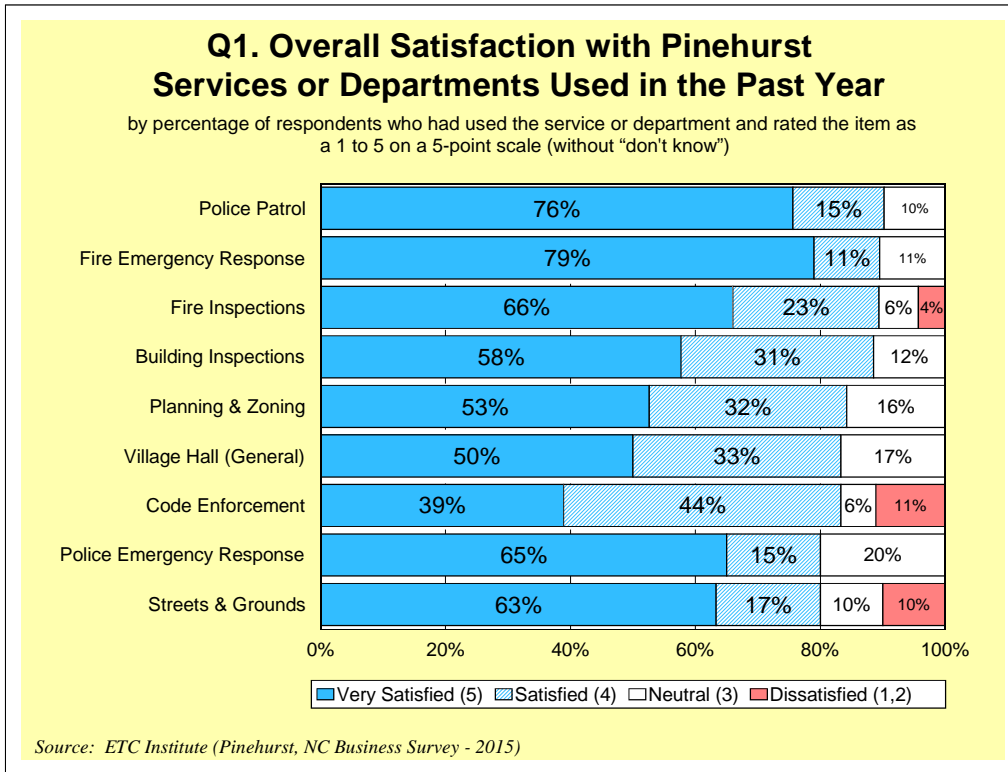
Major Findings

- **Use of Village Services.** The services that the highest percentage of businesses have used in the past year were: fire inspections (65%), police patrol (55%), and streets and grounds (44%).
- **Satisfaction with Village Services and Departments.** The services that had the highest levels of satisfaction from businesses *who had an opinion* were: police patrol (90%), fire emergency response (90%), fire inspections (89%), and building inspections (89%).
- **Most Important Village Services.** Based on the sum of the top three choices, areas that businesses rated as the most important were: (1) police patrol (57%), (2) fire inspections (36%), and (3) streets and grounds (34%).
- **Satisfaction with the Overall Quality of Village Services.** Sixty-four percent (64%) of businesses feel the overall quality of services provided by the Village meets their expectations; 26% feel the overall quality of Village services exceeds their expectation, and only 4% feel the overall quality of Village services are below their expectations.
- **Satisfaction with Various Village Services.** Most (89%) of the businesses surveyed *who had an opinion* indicated that they were satisfied with the cleanliness of streets; 88% were satisfied with the landscape and maintenance in right of ways and public areas and 75% were satisfied with the condition of sidewalks.
- **Perceptions of the Village.** Most (97%) of the businesses surveyed *who had an opinion* indicated that they were satisfied with the overall feeling of safety during the day time; 95% were satisfied with the overall quality of life, 92% were satisfied with the overall feeling of safety in the Village in the evening and 86% were satisfied with the overall image of Village.
- **Likelihood of Recommending the Village as a Business Location.** Over two-thirds (69%) of businesses would be very likely or likely to recommend the Village as a business location to family and friends; 21% would be somewhat likely to recommend the Village as a business location to family and friends, and only 9% would not be likely to recommend the Village as a business location.
- **Business Atmosphere Compared to Two Years Ago.** Forty-three (43%) of businesses feel the overall business atmosphere in the Village is better than two years ago; 40% feel there has been no change, but the atmosphere is good, 3% feel there has been no change but the atmosphere is bad, and only 6% feel the atmosphere is worse.

- **Village Customer Service.** Nearly all (88%) of businesses rated the customer service from the Village at very good or good; only 4% rated the customer service from the Village as poor.
- **Level of Agreement with Statements About Customer Service from Village Staff.** Eighty-seven percent (87%) of the businesses surveyed *who had an opinion* agreed that the Village staff was courteous during their most recent interaction with Village staff; 84% agreed that Village staff was competent and professional, and 79% agreed that Village staff was responsive to their needs.
- **Satisfaction with Village Communications with Businesses.** Over two-thirds (69%) of businesses were satisfied with the job the Village does communicating with business owners, compared to only 8% who were dissatisfied.
- **Village Website.** Over three-fourths (76%) of businesses were very satisfied or satisfied with the Village’s website; 20% rated the Village’s website as “neutral”, and only 4% were dissatisfied. Over three-fourths (78%) of the businesses surveyed *who had an opinion* rated the usefulness of the Village’s website as “very good” or “good”.
- **Community Development (Codes and Ordinances)** Seventy percent (70%) of the businesses *who had an opinion* were satisfied (rating of 4 or 5 on a 5-point scale) with the historic district guidelines; 68% were satisfied with zoning ordinances, and 59% were satisfied with business signage and regulations.
- **Amount of Various Cultural and Entertainment Opportunities** Seventy-five percent (75%) of the businesses surveyed feel the Village has “about the right amount” of major special events, 65% feel the Village has “about the right amount” of family friendly activities, and 61% feel the Village has “about the right amount” of cultural activities.
- **Satisfaction with the Way the Village handles Events That Attract Large Crowds.** Over three-fourths (79%) of businesses are satisfied with the way the Village handles events that attract large crowds.

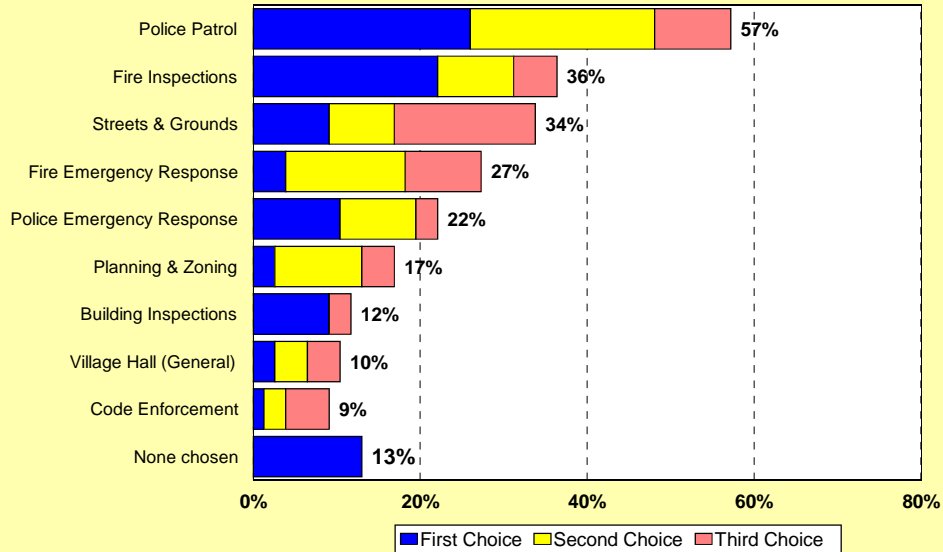
Section 1:
Charts and Graphs





Q2. Village Services or Department Businesses Indicated as the Most Important to their Business

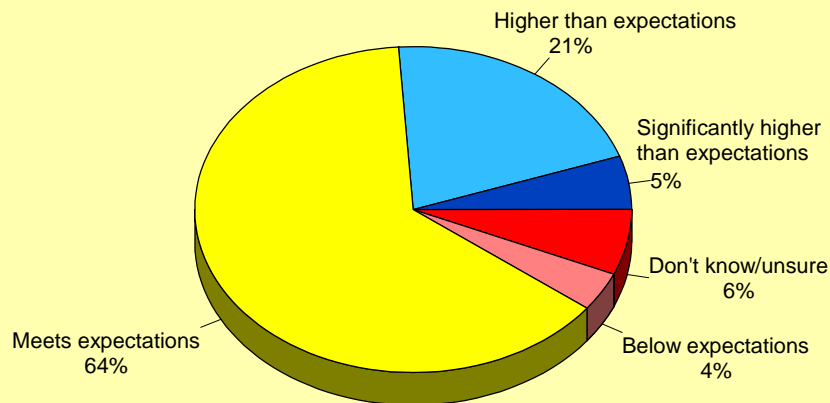
by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute (Pinehurst, NC Business Survey - 2015)

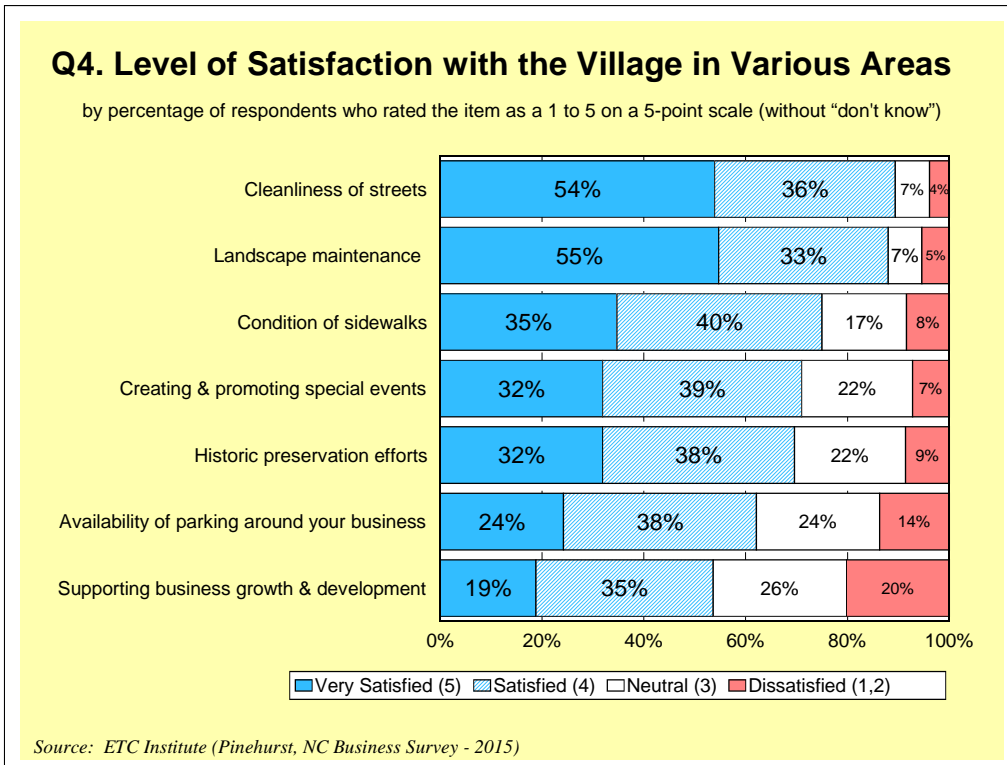
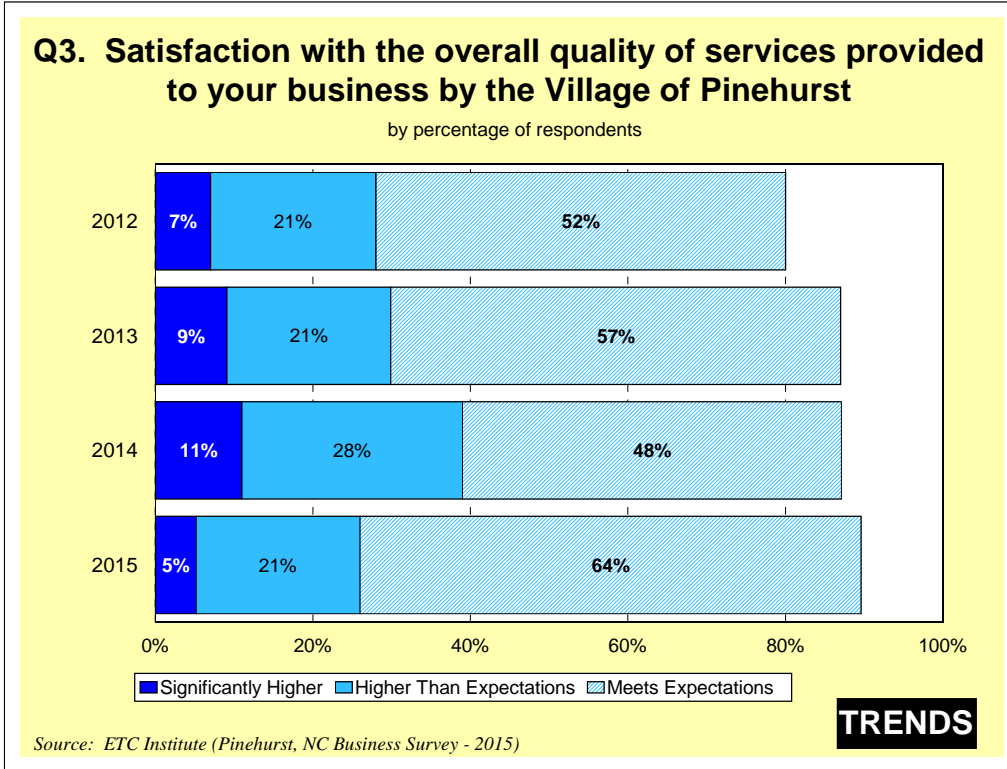
Q3. Satisfaction with the overall quality of services provided to your business by the Village of Pinehurst

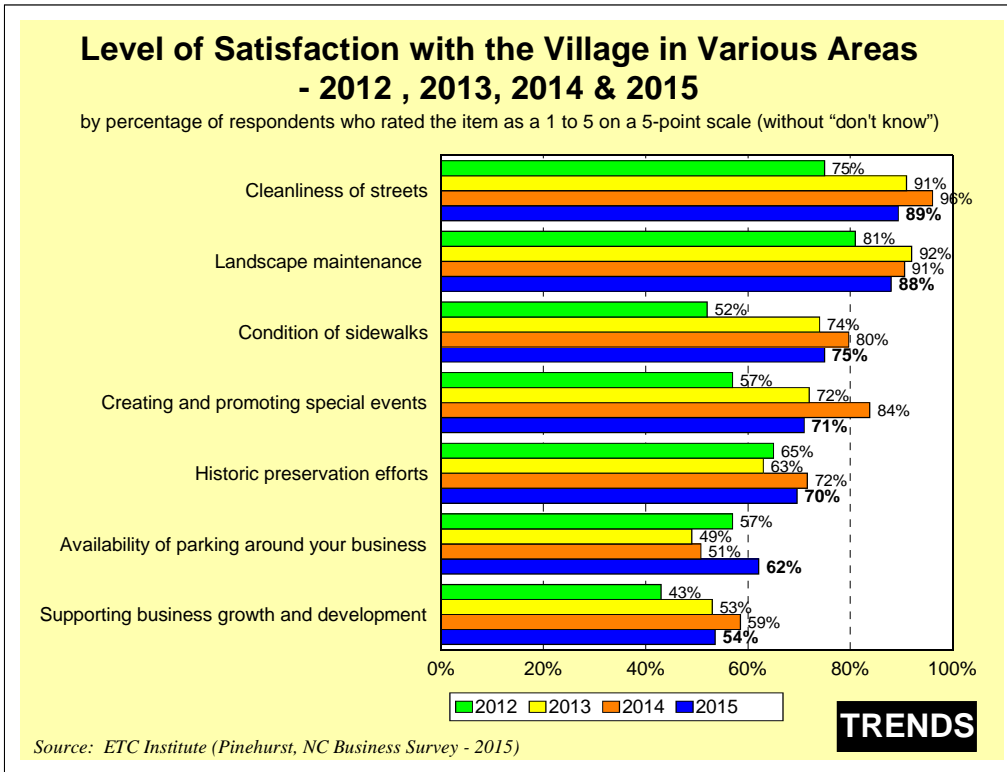
by percentage of respondents



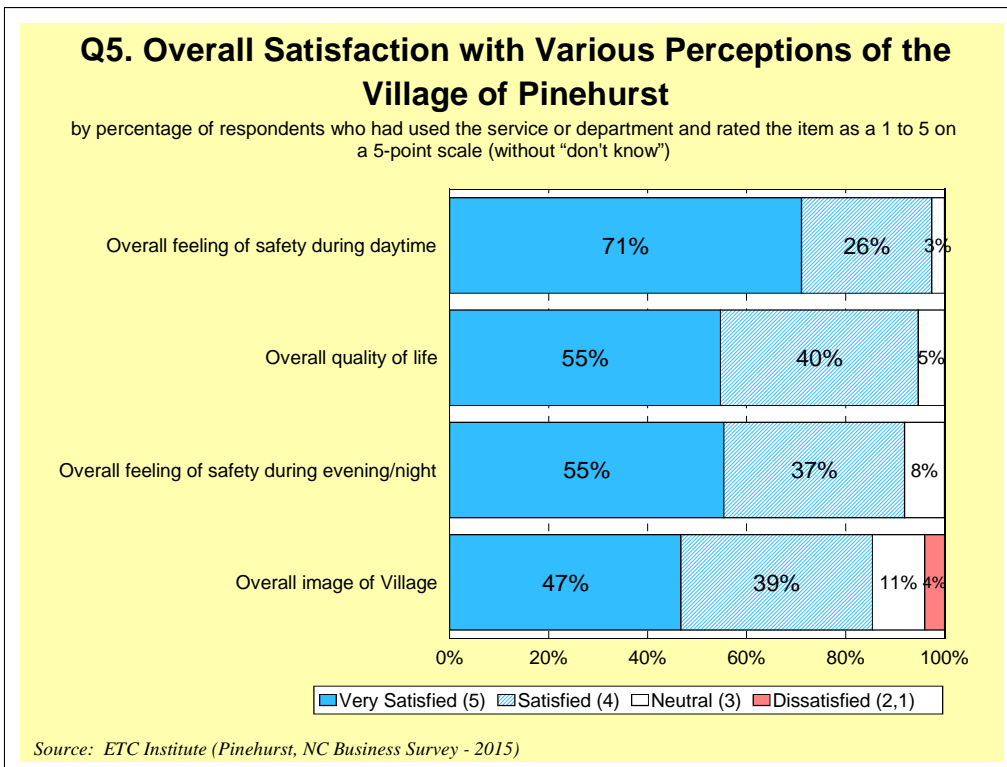
Source: ETC Institute (Pinehurst, NC Business Survey - 2015)

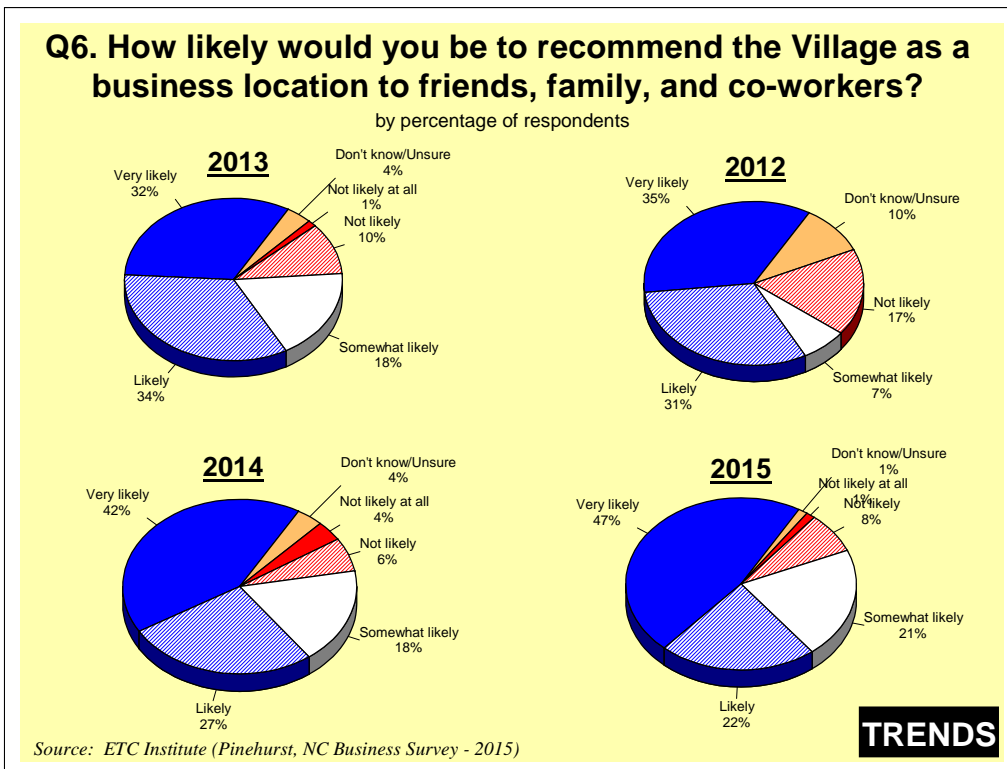
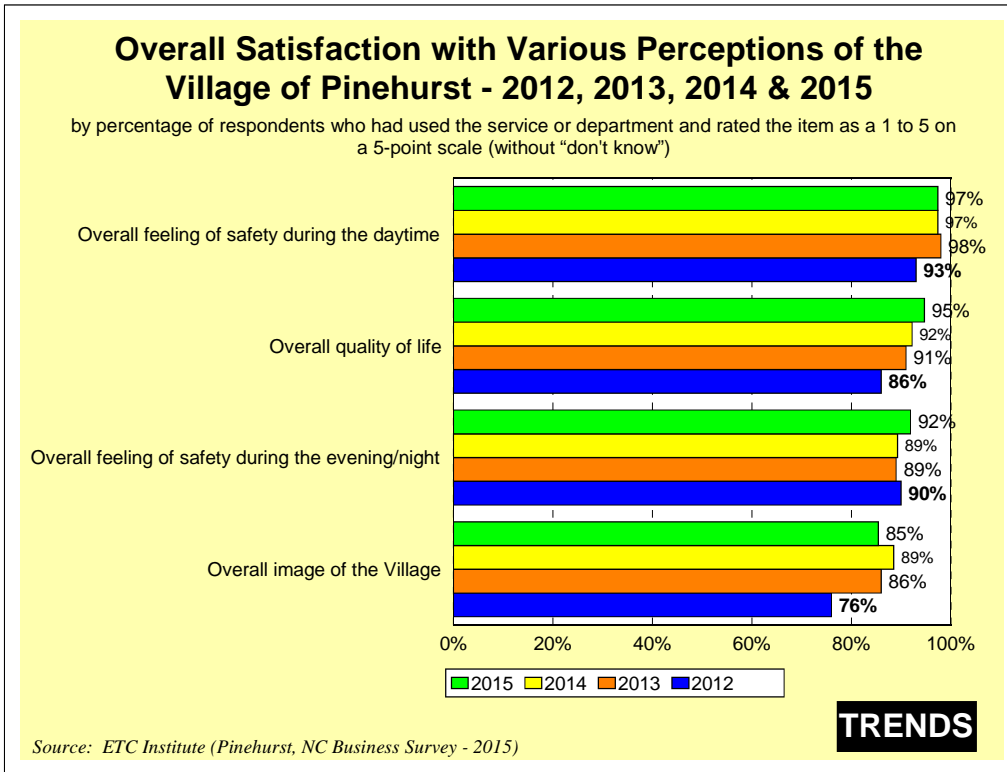
TRENDS





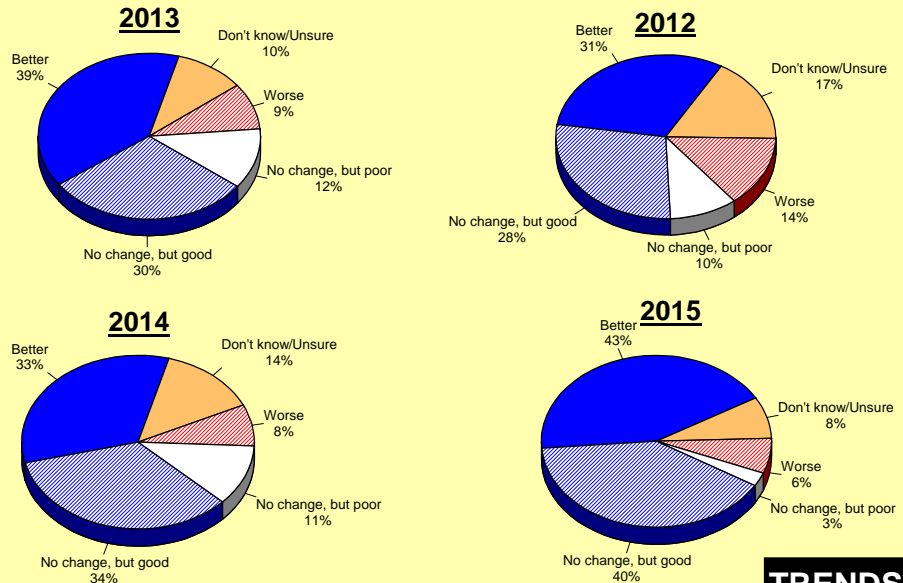
TRENDS





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

by percentage of respondents

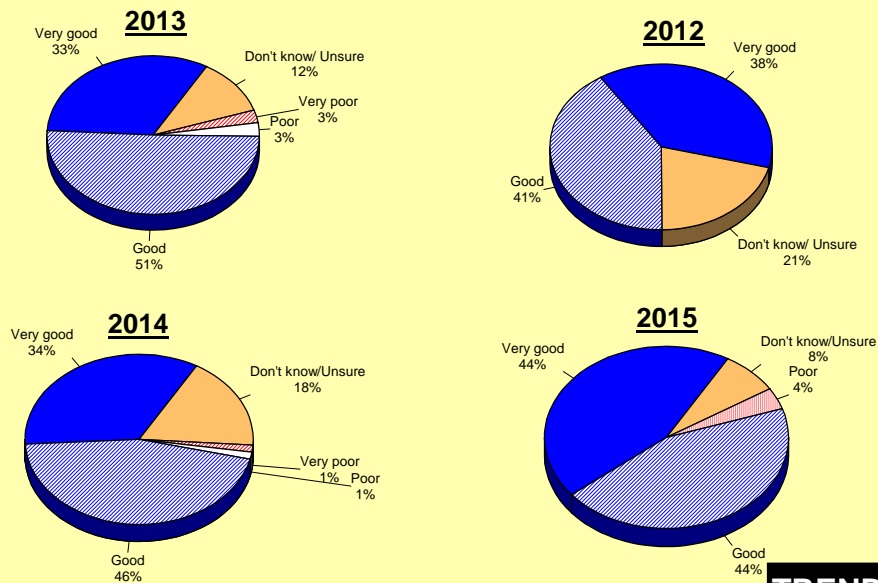


Source: ETC Institute (Pinehurst, NC Business Survey - 2015)

TRENDS

Q8. How would you rate the Village of Pinehurst customer service?

by percentage of respondents

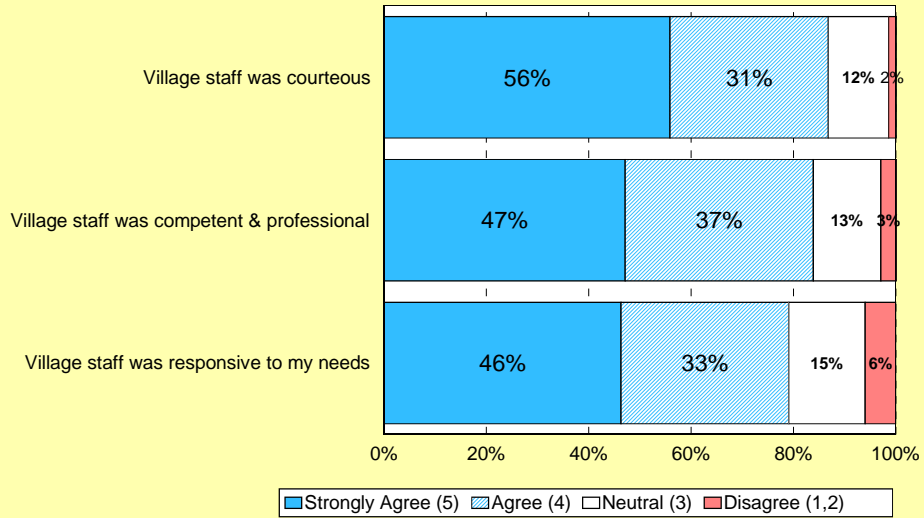


Source: ETC Institute (Pinehurst, NC Business Survey - 2015)

TRENDS

Q9. Level of agreement with statements about your most recent contact with the village government staff

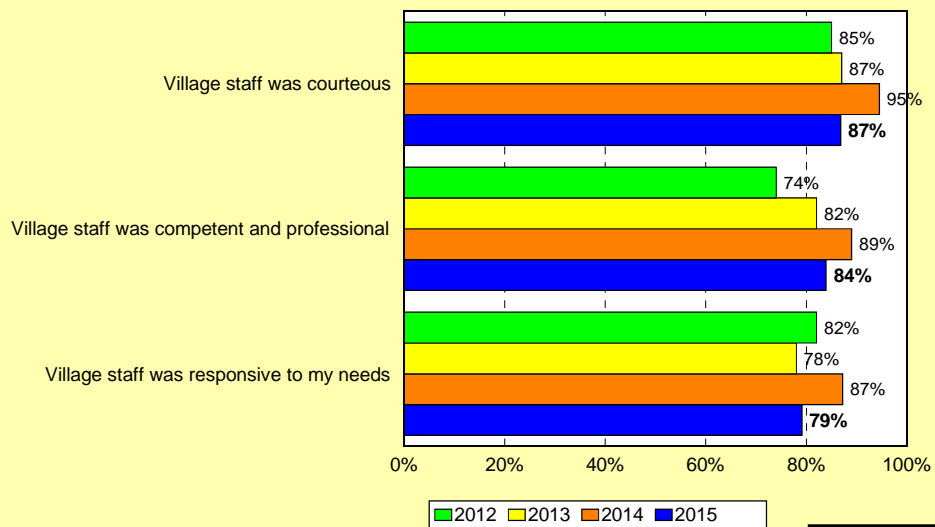
by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (without "don't know")



Source: ETC Institute (Pinehurst, NC Business Survey - 2015)

Level of Agreement with Statements about your Most Recent Contact with the Village - 2012, 2013, 2014 & 2015

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (without "don't know")

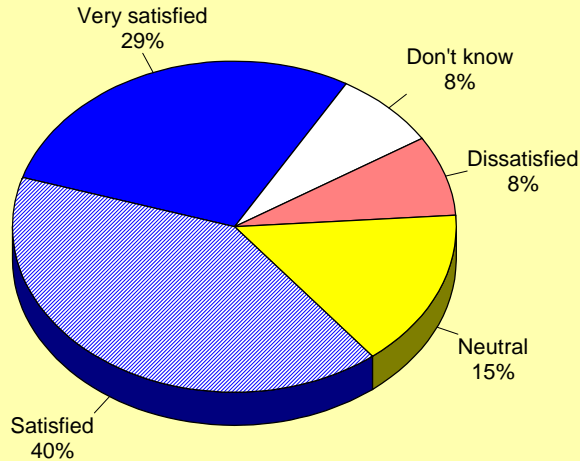


Source: ETC Institute (Pinehurst, NC Business Survey - 2015)

TRENDS

Q10. How satisfied are you with the job the Village of Pinehurst does communicating with business owners?

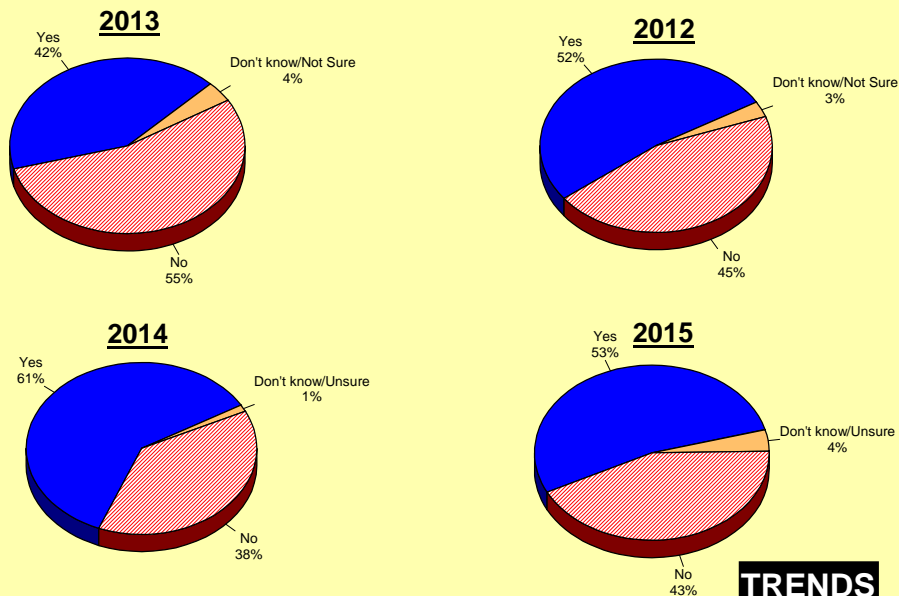
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2015)

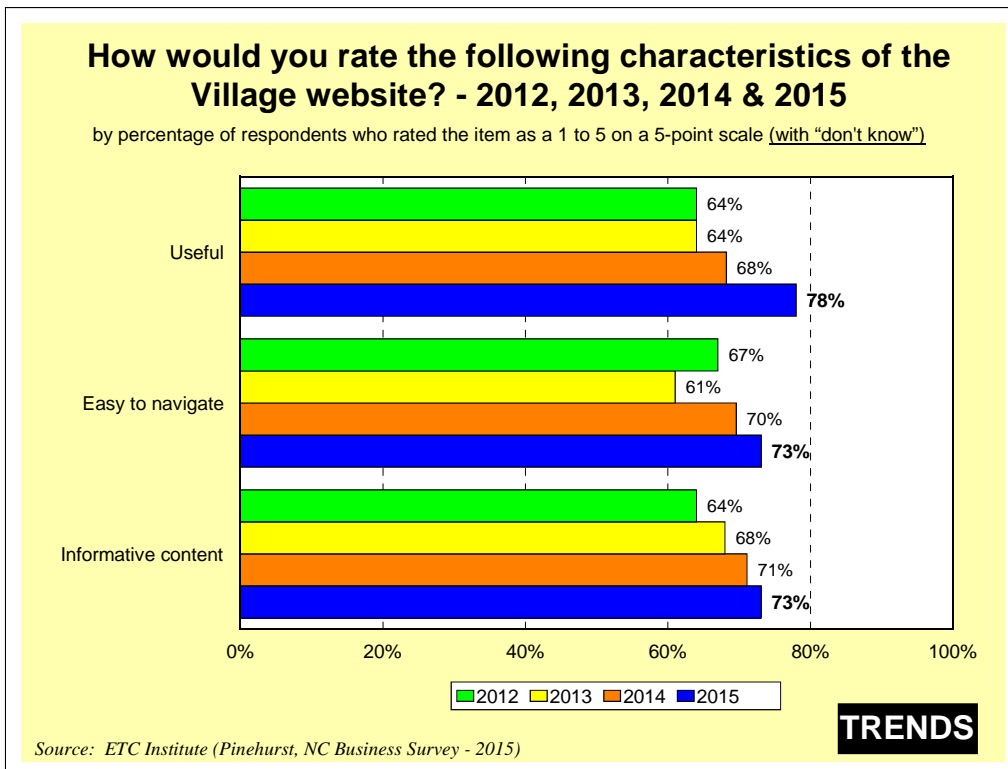
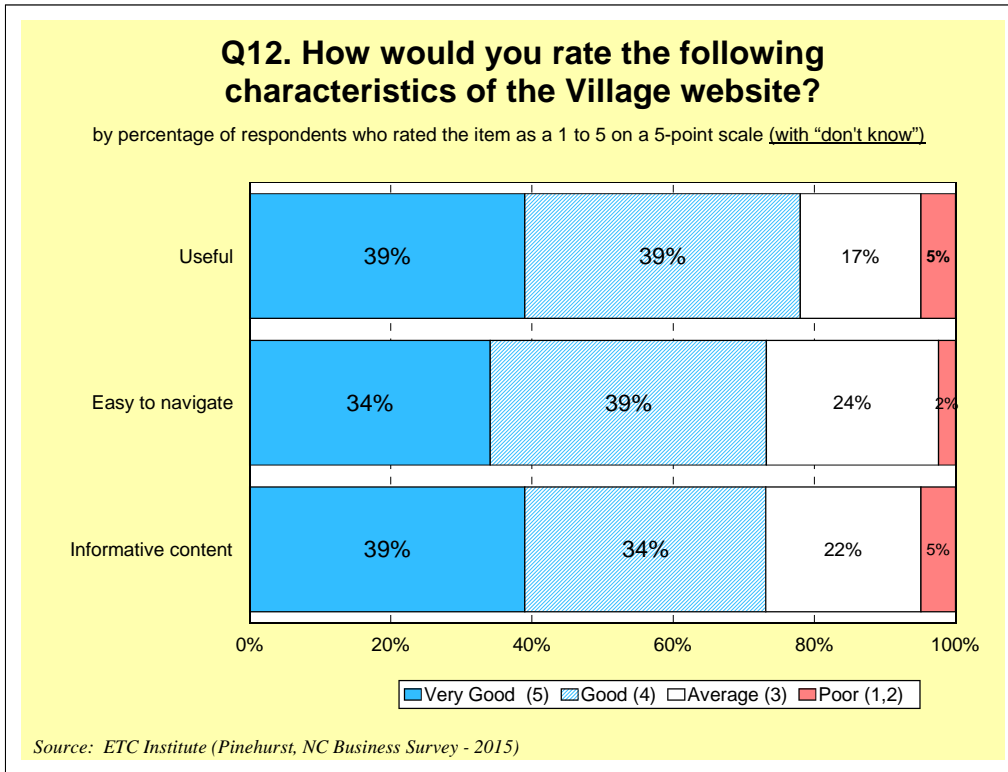
Q11. Have you visited the Village's website (www.vopnc.org) during the past 12 months?

by percentage of respondents



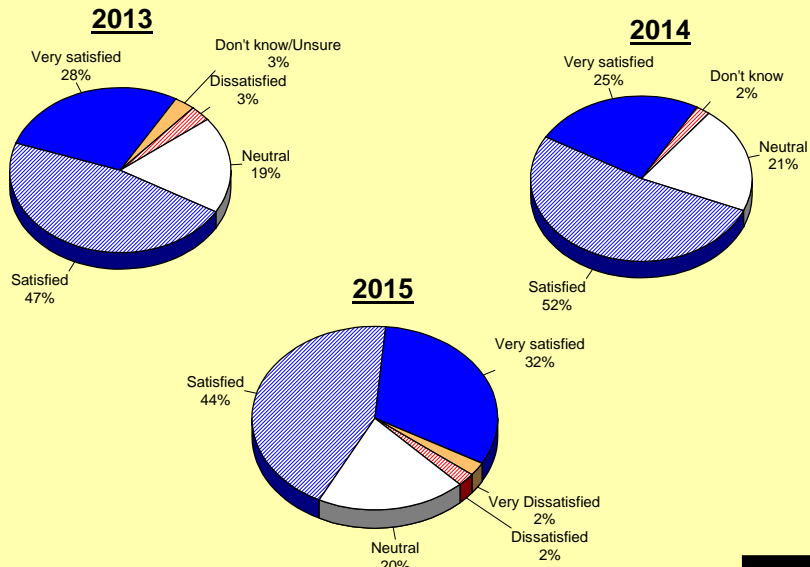
Source: ETC Institute (Pinehurst, NC Business Survey - 2015)

TRENDS



**Q13. How satisfied are you with the Village's website?
- 2013, 2014 & 2015**

by percentage of respondents

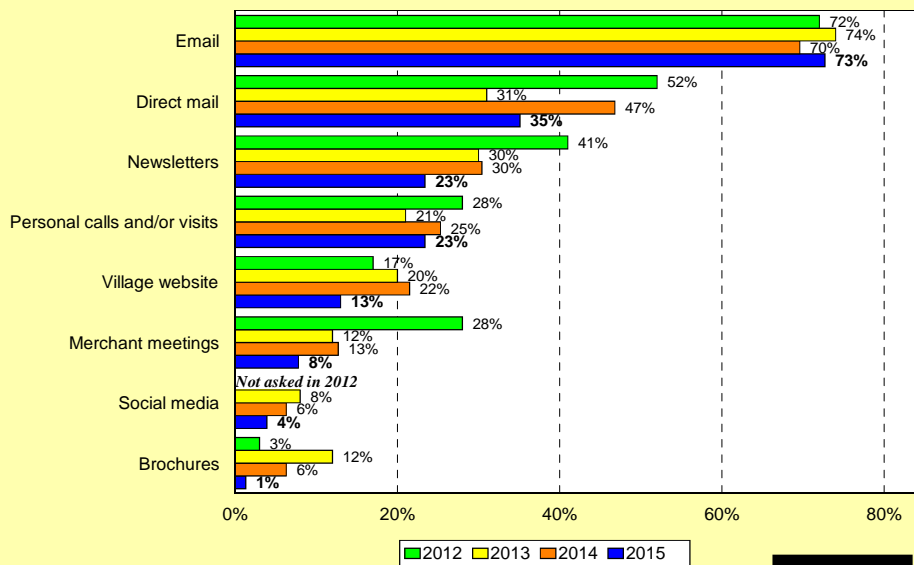


Source: ETC Institute (Pinehurst, NC Business Survey - 2015)

TRENDS

Q14. What are the best ways for the Village to communicate important information to your business?

by percentage of respondents (multiple choices could be made)

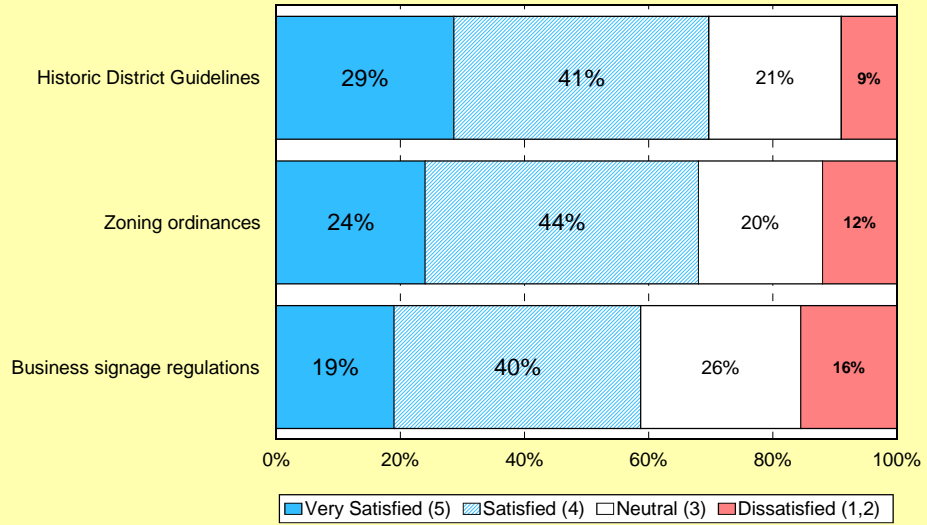


Source: ETC Institute (Pinehurst, NC Business Survey - 2015)

TRENDS

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

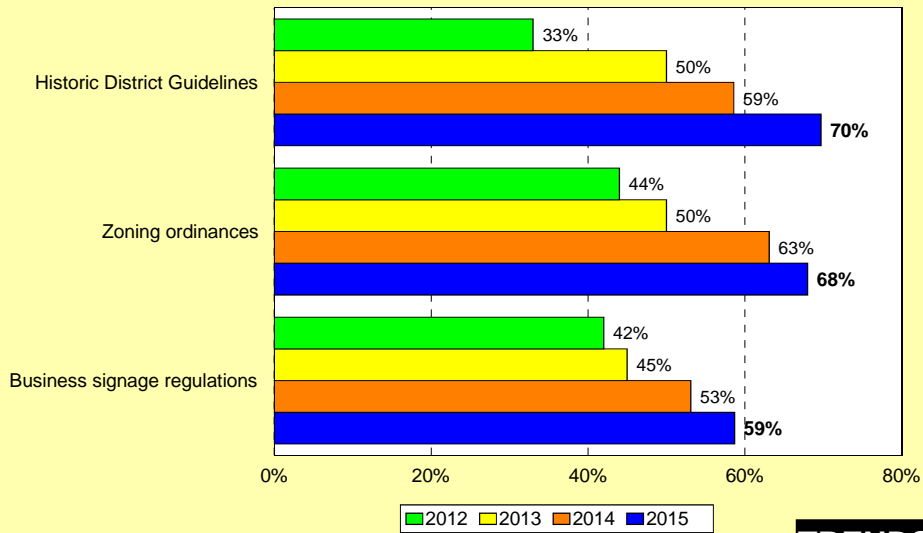
by percentage of respondents who had used the service or department and rated the item as a 1 to 5 on a 5-point scale (without "don't know")



Source: ETC Institute (Pinehurst, NC Business Survey - 2015)

Level of Satisfaction with Community Development (Village Codes and Ordinances) - 2012, 2013, 2014 & 2015

by percentage of respondents who had used the service or department and rated the item as a 1 to 5 on a 5-point scale (without "don't know")

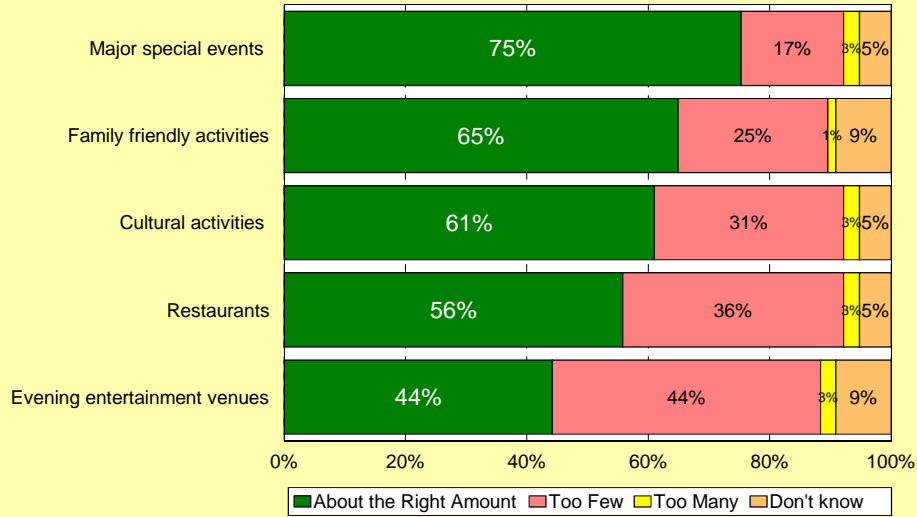


Source: ETC Institute (Pinehurst, NC Business Survey - 2015)

TRENDS

Q16. How Businesses Feel About the Amount of the Various Cultural and Entertainment Opportunities in the Village

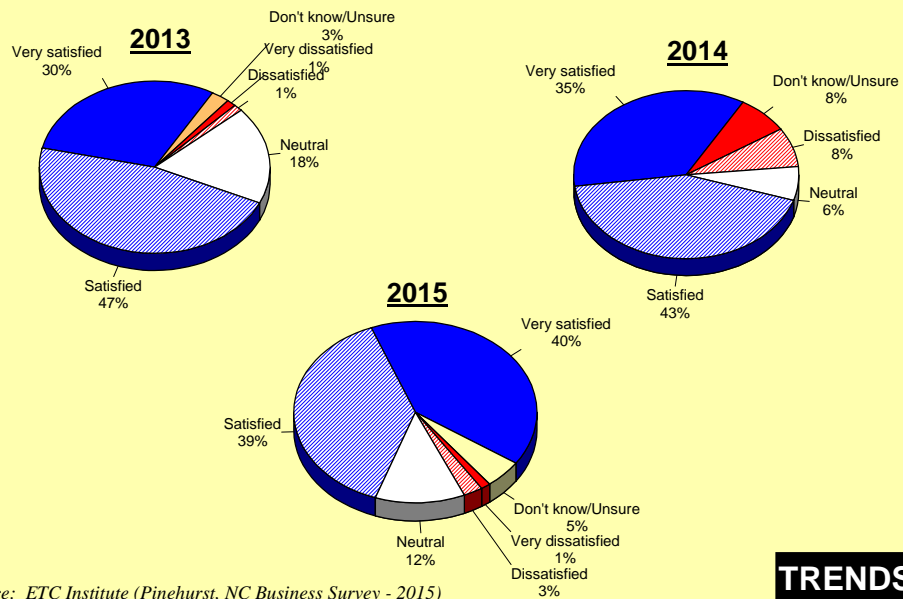
by percentage of respondents who had used the service or department and rated the item as a 1 to 3 on a 3-point scale



Source: ETC Institute (Pinehurst, NC Business Survey - 2015)

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

by percentage of respondents

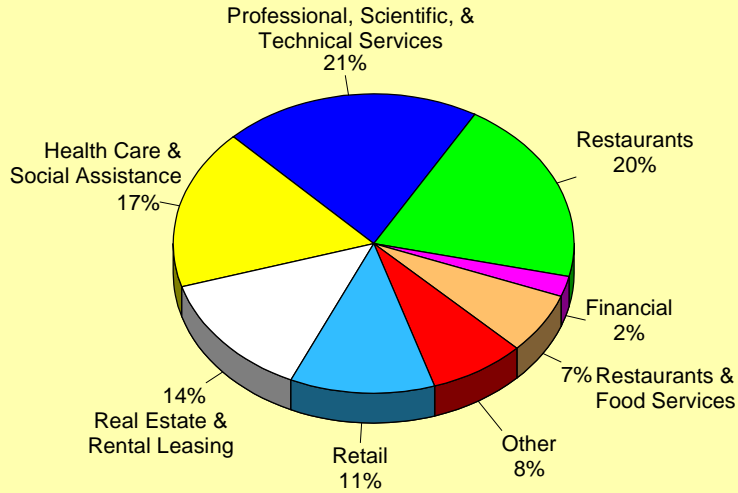


Source: ETC Institute (Pinehurst, NC Business Survey - 2015)

TRENDS

Q18. Primary Business Category for Your Business

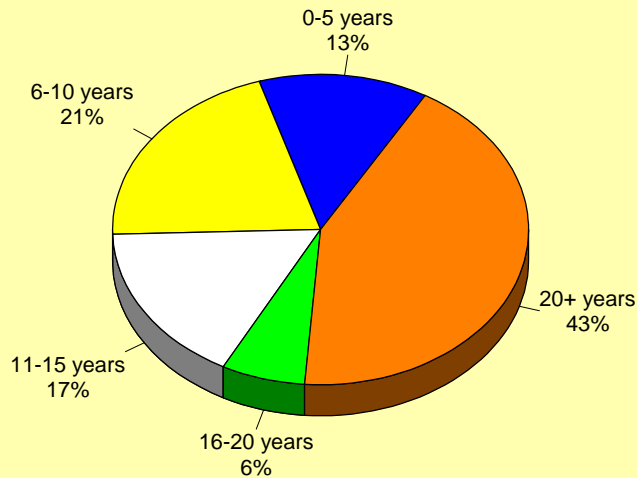
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2015)

Q19. How many years have you been in operation in the Village?

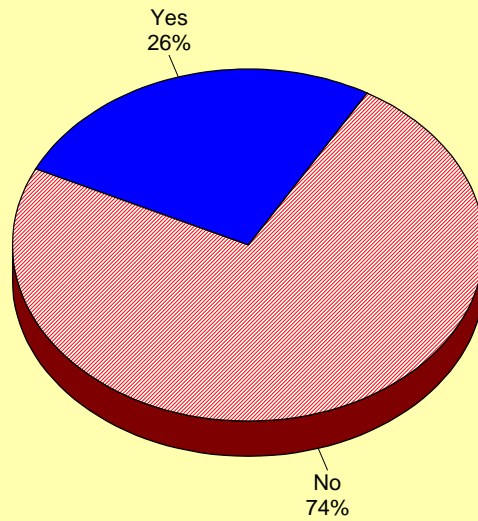
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2015)

Q20a. Are you a member of the Pinehurst Business Guild?

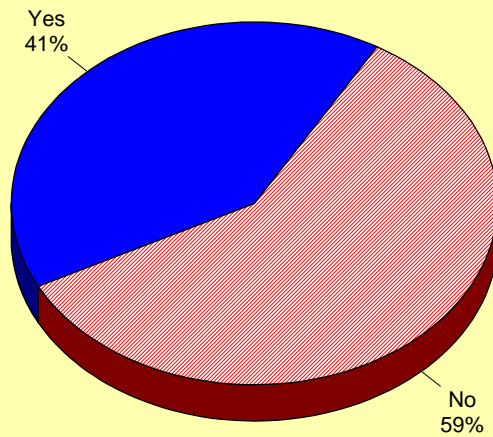
by percentage of respondents



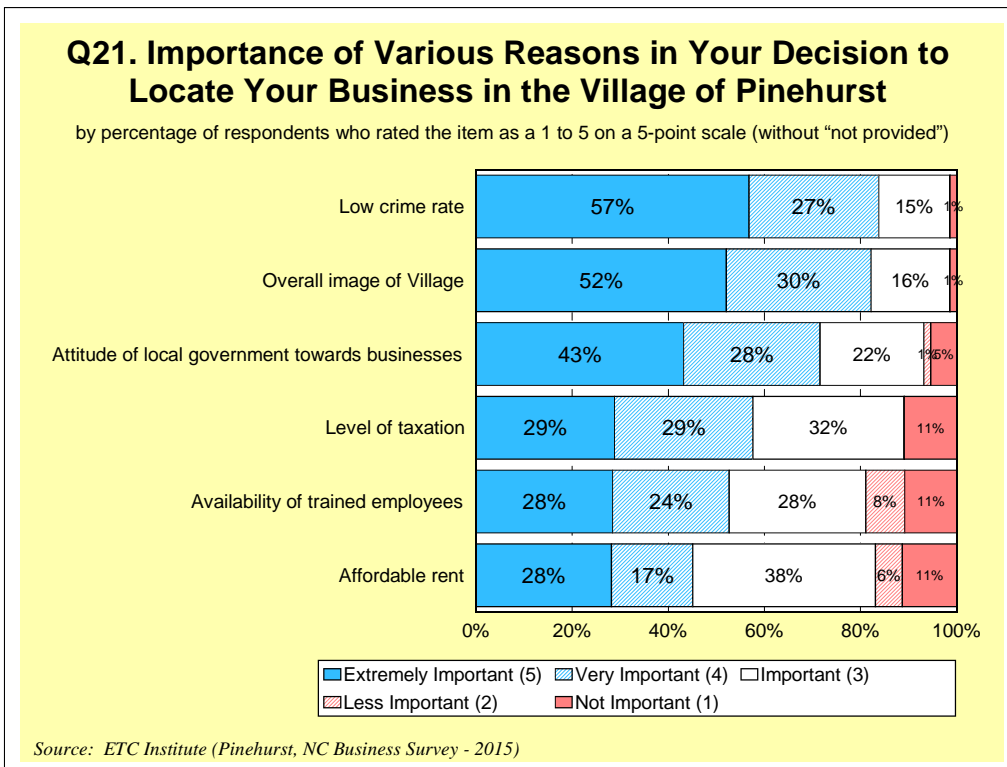
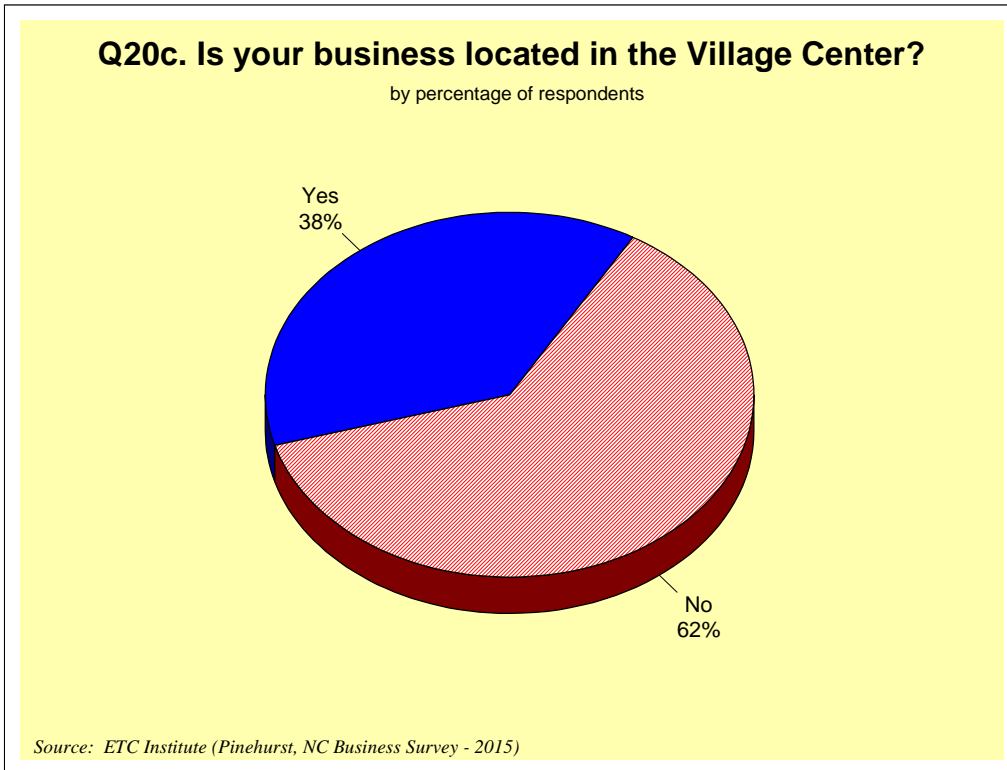
Source: ETC Institute (Pinehurst, NC Business Survey - 2015)

Q20b. Are you a member of the Moore County Chamber of Commerce?

by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2015)



Section 2:
***Importance-Satisfaction
Analysis***

Importance-Satisfaction Analysis

Village of Pinehurst, NC

Overview

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

The Importance-Satisfaction (IS) rating is a unique tool that allows public officials to better understand both of these highly important decision making criteria for each of the services they are providing. The Importance-Satisfaction rating is based on the concept that communities will maximize overall business satisfaction by emphasizing improvements in those service categories where the level of satisfaction is relatively low and the perceived importance of the service is relatively high.

Methodology

The rating is calculated by summing the percentage of responses for items selected as the first, second, and third most important services for the Village to emphasize over the next two years. This sum is then multiplied by 1 minus the percentage of respondents that 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 that the satisfaction ratings among service categories are comparable. $[IS = \text{Importance} \times (1 - \text{Satisfaction})]$.

Example of the Calculation. Respondents were asked to identify the major services they thought were the most important for the Village to provide. Fifty-seven percent (57%) of businesses selected "Police Patrol" as one of the most important major services to provide.

With regard to satisfaction, 90% of the businesses surveyed rated their overall satisfaction with “Police Patrol” as a “4” or a “5” on a 5-point scale (where “5” means “very satisfied”). The I-S rating for “Police Patrol” was calculated by multiplying the sum of the most important percentages by 1 minus the sum of the satisfaction percentages. In this example, 57% was multiplied by 10% (1-0.9). This calculation yielded an I-S rating of 0.0570, which ranked second out of nine major Village services.

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

The lowest rating is 0.00 and could be achieved under either one 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 for the Village to emphasize over the next two years.

Interpreting the Ratings

Ratings that are greater than or equal to 0.20 identify areas that should receive significantly more emphasis over the next two years. Ratings from .10 to .20 identify service areas that should receive increased emphasis. Ratings less than .10 should continue to receive the current level of emphasis.

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

The results for Pinehurst are provided on the following page.

Importance-Satisfaction Rating Village of Pinehurst, NC - Business Survey **OVERALL VILLAGE SERVICES**

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Medium Priority (IS <.10)						
Streets & Grounds	34%	3	80%	9	0.0680	1
Police Patrol	57%	1	90%	1	0.0570	2
Police Emergency Response	22%	5	80%	8	0.0440	3
Fire Inspections	36%	2	89%	3	0.0396	4
Planning & Zoning	17%	6	84%	5	0.0272	5
Fire Emergency Response	27%	4	90%	2	0.0270	6
Village Hall (General)	10%	8	83%	6	0.0170	7
Code Enforcement	9%	9	83%	7	0.0153	8
Building Inspections	12%	7	89%	4	0.0132	9

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

Most Important %:

The "Most Important" percentage represents the sum of the first, second, third and fourth 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 "4" and "5" excluding 'don't knows.' Respondents ranked their level of satisfaction with the each of the items on a scale of 1 to 5 with "5" being very satisfied and "1" being very dissatisfied.

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.

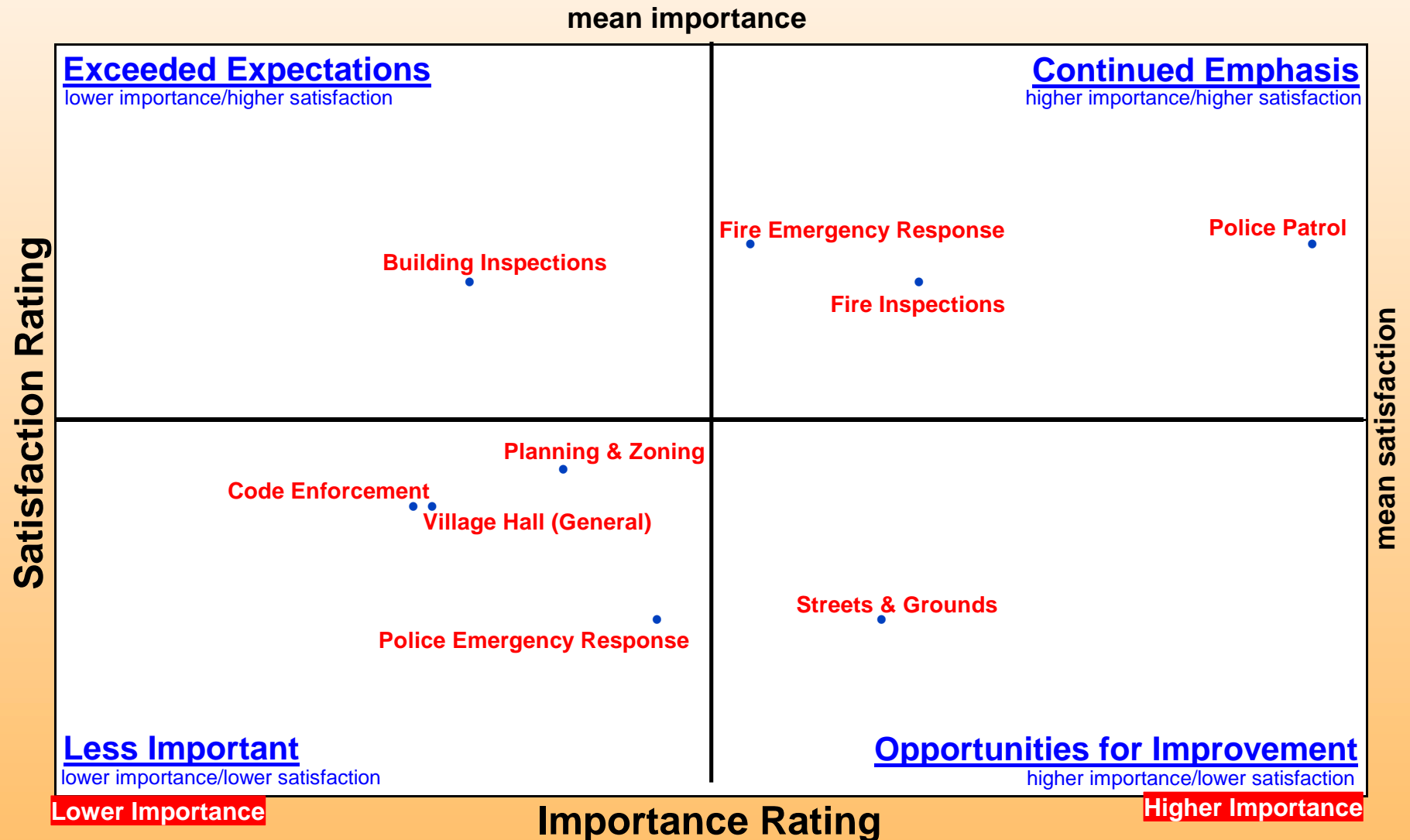
- **Continued Emphasis (above average importance and above average satisfaction).** This area shows where the Village is meeting customer expectations. Items in this area have a significant impact on the customer's overall level of satisfaction. The Village should maintain (or slightly increase) emphasis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

Matrices showing the results for Pinehurst are provided on the following page.

2015 Village of Pinehurst Business Survey Importance-Satisfaction Assessment Matrix

-Overall-

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



Section 3:
Tabular Data

Q1. SERVICE SATISFACTION. Please indicate if your business has used the service or department listed below in the past year.

(N=77)

	Yes	No
Q1a. Building Inspections	37.7%	62.3%
Q1b. Fire Inspections	64.9%	35.1%
Q1c. Planning & Zoning	29.9%	70.1%
Q1d. Code Enforcement	27.3%	72.7%
Q1e. Police Patrol	54.5%	45.5%
Q1f. Police Emergency Response	28.6%	71.4%
Q1g. Fire Emergency Response	28.6%	71.4%
Q1h. Village Hall (General)	33.8%	66.2%
Q1i. Streets & Grounds	44.2%	55.8%

Q1. SERVICE SATISFACTION. If your business has used the service, please rate the service or department on a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

(N=66)

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
Q1a. Building Inspections	51.7%	27.6%	10.3%	0.0%	0.0%	10.3%
Q1b. Fire Inspections	62.0%	22.0%	6.0%	4.0%	0.0%	6.0%
Q1c. Planning & Zoning	43.5%	26.1%	13.0%	0.0%	0.0%	17.4%
Q1d. Code Enforcement	33.3%	38.1%	4.8%	4.8%	4.8%	14.3%
Q1e. Police Patrol	73.8%	14.3%	9.5%	0.0%	0.0%	2.4%
Q1f. Police Emergency Response	59.1%	13.6%	18.2%	0.0%	0.0%	9.1%
Q1g. Fire Emergency Response	68.2%	9.1%	9.1%	0.0%	0.0%	13.6%
Q1h. Village Hall (General)	46.2%	30.8%	15.4%	0.0%	0.0%	7.7%
Q1i. Streets & Grounds	55.9%	14.7%	8.8%	5.9%	2.9%	11.8%

WITHOUT DON'T KNOW

Q1. SERVICE SATISFACTION. If your business has used the service, please rate the service or department on a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied." (without "don't know")

(N=66)

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied
Q1a. Building Inspections	57.7%	30.8%	11.5%	0.0%	0.0%
Q1b. Fire Inspections	66.0%	23.4%	6.4%	4.3%	0.0%
Q1c. Planning & Zoning	52.6%	31.6%	15.8%	0.0%	0.0%
Q1d. Code Enforcement	38.9%	44.4%	5.6%	5.6%	5.6%
Q1e. Police Patrol	75.6%	14.6%	9.8%	0.0%	0.0%
Q1f. Police Emergency Response	65.0%	15.0%	20.0%	0.0%	0.0%
Q1g. Fire Emergency Response	78.9%	10.5%	10.5%	0.0%	0.0%
Q1h. Village Hall (General)	50.0%	33.3%	16.7%	0.0%	0.0%
Q1i. Streets & Grounds	63.3%	16.7%	10.0%	6.7%	3.3%

Q2. Which THREE of the services or Village departments listed in Question 1 are the most important to your business?

Q2. Top choice	Number	Percent
Building Inspections	7	9.1 %
Fire Inspections	17	22.1 %
Planning & Zoning	2	2.6 %
Code Enforcement	1	1.3 %
Police Patrol	20	26.0 %
Police Emergency Response	8	10.4 %
Fire Emergency Response	3	3.9 %
Village Hall (General)	2	2.6 %
Streets & Grounds	7	9.1 %
None chosen	10	13.0 %
Total	77	100.0 %

Q2. Which THREE of the services or Village departments listed in Question 1 are the most important to your business?

Q2. 2nd choice	Number	Percent
Fire Inspections	7	9.1 %
Planning & Zoning	8	10.4 %
Code Enforcement	2	2.6 %
Police Patrol	17	22.1 %
Police Emergency Response	7	9.1 %
Fire Emergency Response	11	14.3 %
Village Hall (General)	3	3.9 %
Streets & Grounds	6	7.8 %
None chosen	16	20.8 %
Total	77	100.0 %

Q2. Which THREE of the services or Village departments listed in Question 1 are the most important to your business?

<u>Q2. 3rd choice</u>	<u>Number</u>	<u>Percent</u>
Building Inspections	2	2.6 %
Fire Inspections	4	5.2 %
Planning & Zoning	3	3.9 %
Code Enforcement	4	5.2 %
Police Patrol	7	9.1 %
Police Emergency Response	2	2.6 %
Fire Emergency Response	7	9.1 %
Village Hall (General)	3	3.9 %
Streets & Grounds	13	16.9 %
None chosen	32	41.6 %
Total	77	100.0 %

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

<u>Q2. Sum of Top 3 Choices</u>	<u>Number</u>	<u>Percent</u>
Building Inspections	9	11.7 %
Fire Inspections	28	36.4 %
Planning & Zoning	13	16.9 %
Code Enforcement	7	9.1 %
Police Patrol	44	57.1 %
Police Emergency Response	17	22.1 %
Fire Emergency Response	21	27.3 %
Village Hall (General)	8	10.4 %
Streets & Grounds	26	33.8 %
None chosen	10	13.0 %
Total	183	

Q3. In general, how satisfied are you with the overall quality of services provided to your business by the Village of Pinehurst? Would you say the quality of services provided is:

Q3. How satisfied are you with overall quality of services provided	Number	Percent
Significantly higher than your expectations	4	5.2 %
Higher than your expectations	16	20.8 %
Meets your expectations	49	63.6 %
Below your expectations	3	3.9 %
Don't know/unsure	5	6.5 %
Total	77	100.0 %

Q4. Using a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied," please indicate how satisfied your business is with the Village in the following areas:

(N=77)

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
Q4a. Supporting business growth & development	16.9%	31.2%	23.4%	11.7%	6.5%	10.4%
Q4b. Availability of employee & customer parking around your business	20.8%	32.5%	20.8%	5.2%	6.5%	14.3%
Q4c. Condition of sidewalks	32.5%	37.7%	15.6%	5.2%	2.6%	6.5%
Q4d. Creating & promoting special events	28.6%	35.1%	19.5%	5.2%	1.3%	10.4%
Q4e. Historic preservation efforts	28.6%	33.8%	19.5%	6.5%	1.3%	10.4%
Q4f. Cleanliness of streets	53.2%	35.1%	6.5%	2.6%	1.3%	1.3%
Q4g. Landscape maintenance in rights of way & public areas	53.2%	32.5%	6.5%	2.6%	2.6%	2.6%

WITHOUT DON'T KNOW

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

(N=77)

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied
Q4a. Supporting business growth & development	18.8%	34.8%	26.1%	13.0%	7.2%
Q4b. Availability of employee & customer parking around your business	24.2%	37.9%	24.2%	6.1%	7.6%
Q4c. Condition of sidewalks	34.7%	40.3%	16.7%	5.6%	2.8%
Q4d. Creating & promoting special events	31.9%	39.1%	21.7%	5.8%	1.4%
Q4e. Historic preservation efforts	31.9%	37.7%	21.7%	7.2%	1.4%
Q4f. Cleanliness of streets	53.9%	35.5%	6.6%	2.6%	1.3%
Q4g. Landscape maintenance in rights of way & public areas	54.7%	33.3%	6.7%	2.7%	2.7%

Q5. PERCEPTIONS OF THE VILLAGE. Several items that may influence your business's perceptions of the Village of Pinehurst are listed below. Please rate each item on a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

(N=77)

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Don't Know
Q5a. Overall image of Village	45.5%	37.7%	10.4%	3.9%	2.6%
Q5b. Overall quality of life	53.2%	39.0%	5.2%	0.0%	2.6%
Q5c. Overall feeling of safety during daytime	70.1%	26.0%	2.6%	0.0%	1.3%
Q5d. Overall feeling of safety during evening/night	53.2%	35.1%	7.8%	0.0%	3.9%

WITHOUT DON'T KNOW

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

(N=77)

	Very Satisfied	Satisfied	Neutral	Dissatisfied
Q5a. Overall image of Village	46.7%	38.7%	10.7%	4.0%
Q5b. Overall quality of life	54.7%	40.0%	5.3%	0.0%
Q5c. Overall feeling of safety during daytime	71.1%	26.3%	2.6%	0.0%
Q5d. Overall feeling of safety during evening/night	55.4%	36.5%	8.1%	0.0%

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

Q6. How likely would you be to recommend Village as a business location	Number	Percent
Very likely	36	46.8 %
Likely	17	22.1 %
Somewhat Likely	16	20.8 %
Not likely	6	7.8 %
Not likely at all	1	1.3 %
Don't know/unsure	1	1.3 %
Total	77	100.0 %

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

Q7. Overall business atmosphere in Village of Pinehurst today	Number	Percent
Better	33	42.9 %
No change, but good	31	40.3 %
No change, but poor	2	2.6 %
Worse	5	6.5 %
Don't know/unsure	6	7.8 %
Total	77	100.0 %

Q8. CUSTOMER SERVICE. Overall, how would you rate the Village of Pinehurst customer service?
Would you say it is:

Q8. How would you rate Village of Pinehurst customer service	Number	Percent
Very good	34	44.2 %
Good	34	44.2 %
Poor	3	3.9 %
Don't know/unsure	6	7.8 %
Total	77	100.0 %

Q9. Thinking about your most recent contact with Village government staff, please rate your experience on the following scale of 1 to 5, where 5 means "Strongly Agree" and 1 means "Strongly Disagree."

(N=77)

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know
Q9a. Village staff was responsive to my needs	40.3%	28.6%	13.0%	3.9%	1.3%	13.0%
Q9b. Village staff was competent & professional	41.6%	32.5%	11.7%	1.3%	1.3%	11.7%
Q9c. Village staff was courteous	49.4%	27.3%	10.4%	1.3%	0.0%	11.7%

WITHOUT DON'T KNOW

Q9. Thinking about your most recent contact with Village government staff, please rate your experience on the following scale of 1 to 5, where 5 means "Strongly Agree" and 1 means "Strongly Disagree." (without "don't know")

(N=77)

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Q9a. Village staff was responsive to my needs	46.3%	32.8%	14.9%	4.5%	1.5%
Q9b. Village staff was competent & professional	47.1%	36.8%	13.2%	1.5%	1.5%
Q9c. Village staff was courteous	55.9%	30.9%	11.8%	1.5%	0.0%

Q10. COMMUNICATION. Overall, how satisfied are you with the job the Village of Pinehurst does communicating with business owners? Would you say you are...

Q10. How satisfied are you with Village of Pinehurst communicating with business owners	Number	Percent
Very satisfied	22	28.6 %
Satisfied	31	40.3 %
Neutral	12	15.6 %
Dissatisfied	4	5.2 %
Very dissatisfied	2	2.6 %
Don't know	6	7.8 %
Total	77	100.0 %

WITHOUT DON'T KNOW

Q10. COMMUNICATION. Overall, how satisfied are you with the job the Village of Pinehurst does communicating with business owners? Would you say you are... (without "don't know")

Q10. How satisfied are you with Village of Pinehurst communicating with business owners	Number	Percent
Very satisfied	22	31.0 %
Satisfied	31	43.7 %
Neutral	12	16.9 %
Dissatisfied	4	5.6 %
Very dissatisfied	2	2.8 %
Total	71	100.0 %

Q11. Have you visited the Village's website (www.vopnc.org) during the last 12 months?

Q11. Have you visited Village's website during last 12 months	Number	Percent
Yes	41	53.2 %
No	33	42.9 %
Don't know/unsure	3	3.9 %
Total	77	100.0 %

Q12. (If YES to Question 11) Using a scale of 1 to 5, where 5 means "Very Good" and 1 means "Very Poor", please rate the Village website on the following characteristics: (without "don't know")

(N=41)

	Very Good	Good	Average	Poor
Q12a. Easy to navigate	34.1%	39.0%	24.4%	2.4%
Q12b. Informative content	39.0%	34.1%	22.0%	4.9%
Q12c. Useful	39.0%	39.0%	17.1%	4.9%

Q13. (If YES to Question 11) Overall, how satisfied would you say you were with the Village of Pinehurst Website? Would you say you were...

Q13. How satisfied were you with Village's website	Number	Percent
Very satisfied	13	31.7 %
Satisfied	18	43.9 %
Neutral	8	19.5 %
Dissatisfied	1	2.4 %
Very dissatisfied	1	2.4 %
Total	41	100.0 %

Q14. Please indicate the best ways for the Village to communicate with you to get important information to your business. (without "none chosen")

Q14. Best ways for Village to communicate with you to get important information to your business	Number	Percent
Email	56	72.7 %
Direct Mail	27	35.1 %
Newsletters	18	23.4 %
Personal calls and/or visits	18	23.4 %
Village website	10	13.0 %
Merchant meetings	6	7.8 %
Social media	3	3.9 %
Other	2	2.6 %
Brochures	1	1.3 %
Total	141	

Q14. Other

Q14. Other	Number
PILOT	1

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

(N=77)

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
Q15a. Zoning ordinances	15.6%	28.6%	13.0%	6.5%	1.3%	35.1%
Q15b. Business signage regulations	14.3%	29.9%	19.5%	5.2%	6.5%	24.7%
Q15c. Historic district guidelines	20.8%	29.9%	15.6%	3.9%	2.6%	27.3%

WITHOUT DON'T KNOW

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

(N=77)

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied
Q15a. Zoning ordinances	24.0%	44.0%	20.0%	10.0%	2.0%
Q15b. Business signage regulations	19.0%	39.7%	25.9%	6.9%	8.6%
Q15c. Historic district guidelines	28.6%	41.1%	21.4%	5.4%	3.6%

Q16. CULTURE/ENTERTAINMENT. Using a scale of 1 to 3, where 3 means "Too Few" and 1 means "Too Many," please indicate if you feel there are an appropriate amount of the following in the Village Center:

(N=77)

	Too few	About right amount	Too Many	Don't Know
Q16a. Restaurants	36.4%	55.8%	2.6%	5.2%
Q16b. Evening entertainment venues	44.2%	44.2%	2.6%	9.1%
Q16c. Cultural activities (live music, art festivals, etc.)	31.2%	61.0%	2.6%	5.2%
Q16d. Family friendly activities (movies in the park, etc.)	24.7%	64.9%	1.3%	9.1%
Q16e. Major special events (Holly Arts & Crafts Festival, parades, etc.)	16.9%	75.3%	2.6%	5.2%

WITHOUT DON'T KNOW

Q16. CULTURE/ENTERTAINMENT. Using a scale of 1 to 3, where 3 means "Too Few" and 1 means "Too Many," please indicate if you feel there are an appropriate amount of the following in the Village Center: (without "don't know")

(N=77)

	Too few	About right amount	Too Many
Q16a. Restaurants	38.4%	58.9%	2.7%
Q16b. Evening entertainment venues	48.6%	48.6%	2.9%
Q16c. Cultural activities (live music, art festivals, etc.)	32.9%	64.4%	2.7%
Q16d. Family friendly activities (movies in the park, etc.)	27.1%	71.4%	1.4%
Q16e. Major special events (Holly Arts & Crafts Festival, parades, etc.)	17.8%	79.5%	2.7%

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

Q17. How satisfied you are with the way Village handles events that attract large crowds	Number	Percent
Very Satisfied	31	40.3 %
Satisfied	30	39.0 %
Neutral	9	11.7 %
Dissatisfied	2	2.6 %
Very Dissatisfied	1	1.3 %
Don't Know/Unsure	4	5.2 %
Total	77	100.0 %

Q18. DEMOGRAPHIC/OTHER INFORMATION. Please indicate the primary business category for your business: (without "none chosen")

Q18. Primary business category	Number	Percent
Professional, Scientific, & Technical Services	18	23.4 %
Real Estate & Rental Leasing	15	19.5 %
Retail	12	15.6 %
Other	10	13.0 %
Health Care & Social Assistance	9	11.7 %
Financial & Insurance	8	10.4 %
Restaurants & Food Services	4	5.2 %
Arts, Entertainment, & Recreation	2	2.6 %
Inn	2	2.6 %
Total	80	

Q19. How many years have you been in operation in the Village?

Q19. How many years have you been in operation in Village	Number	Percent
0-5 years	10	13.0 %
6-10 years	16	20.8 %
11-15 years	13	16.9 %
16-20 years	5	6.5 %
20+ years	33	42.9 %
Total	77	100.0 %

Q20. Please answer the following questions:

(N=77)

	Yes	No	Not provided
Q20a. Are you a member of Pinehurst Business Partners	26.0%	72.7%	1.3%
Q20b. Are you a member of Moore County Chamber of Commerce	40.3%	58.4%	1.3%
Q20c. Is your business located in Village Center	37.7%	62.3%	0.0%

WITHOUT NOT PROVIDED

Q20. Please answer the following questions: (without "not provided")

(N=77)

	Yes	No
Q20a. Are you a member of Pinehurst Business Partners	26.3%	73.7%
Q20b. Are you a member of Moore County Chamber of Commerce	40.8%	59.2%
Q20c. Is your business located in Village Center	37.7%	62.3%

Q21. Using a scale of 1 to 5, where 5 means "Extremely Important" and 1 means "Not Important," please indicate how important each of the following reasons were in your decision to locate your business in the Village of Pinehurst:

(N=77)

	Extremely Important	Very Important	Important	Less Important	Not Important	Don't Know
Q21a. Overall image of Village	49.4%	28.6%	15.6%	0.0%	1.3%	5.2%
Q21b. Low crime rate	54.5%	26.0%	14.3%	0.0%	1.3%	3.9%
Q21c. Availability of trained employees	27.3%	23.4%	27.3%	7.8%	10.4%	3.9%
Q21d. Level of taxation	27.3%	27.3%	29.9%	0.0%	10.4%	5.2%
Q21e. Affordable rent	26.0%	15.6%	35.1%	5.2%	10.4%	7.8%
Q21f. Attitude of local government towards businesses	41.6%	27.3%	20.8%	1.3%	5.2%	3.9%

WITHOUT DON'T KNOW

Q21. Using a scale of 1 to 5, where 5 means "Extremely Important" and 1 means "Not Important," please indicate how important each of the following reasons were in your decision to locate your business in the Village of Pinehurst: (without "don't know")

(N=77)

	Extremely Important	Very Important	Important	Less Important	Not Important
Q21a. Overall image of Village	52.1%	30.1%	16.4%	0.0%	1.4%
Q21b. Low crime rate	56.8%	27.0%	14.9%	0.0%	1.4%
Q21c. Availability of trained employees	28.4%	24.3%	28.4%	8.1%	10.8%
Q21d. Level of taxation	28.8%	28.8%	31.5%	0.0%	11.0%
Q21e. Affordable rent	28.2%	16.9%	38.0%	5.6%	11.3%
Q21f. Attitude of local government towards businesses	43.2%	28.4%	21.6%	1.4%	5.4%

Section 4:
Survey Instrument



HISTORY, CHARM, AND SOUTHERN HOSPITALITY

August 2015

Dear Village of Pinehurst Business Owner,

The Village of Pinehurst is requesting your help to gather business owners' opinions and feedback regarding Village services. The attached survey will be used to help determine your level of satisfaction with our services and help us improve future services.

We greatly appreciate your participation. Please take a few minutes to complete and return the survey in the postage paid envelope. We estimate it should take approximately 5-10 minutes to answer all the questions, and your individual responses to the questions will remain confidential.

Please return your completed survey in the next few days using the postage paid envelope provided.

The survey data will be compiled and analyzed by ETC Institute, one of the nation's leading governmental research firms. Upon receipt of their final report, Village staff will present the survey results to the Pinehurst Village Council at their Strategic Planning Retreat in December.

If you have any questions about the survey, please contact me directly at 295-1900, ext. 1103. Thank you for helping guide the direction of our community by completing and returning the enclosed survey.

Sincerely,

A handwritten signature in black ink, appearing to read "Natalie E. Dean".

Natalie E. Dean
Assistant Village Manager

ADMINISTRATION

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



2015 Village of Pinehurst Business Satisfaction Survey

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

1. **SERVICE SATISFACTION.** Please indicate if your business has used the service or department listed below in the past year. If your business has used the service, please rate the service or department on a scale of 1 to 5, where 5 means "Very Satisfied" and 1 means "Very Dissatisfied."

Has your business used this service or department in the past year?			Service/Program	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
A.	YES	NO	Building Inspections	5	4	3	2	1	9
B.	YES	NO	Fire Inspections	5	4	3	2	1	9
C.	YES	NO	Planning and Zoning	5	4	3	2	1	9
D.	YES	NO	Code Enforcement	5	4	3	2	1	9
E.	YES	NO	Police Patrol	5	4	3	2	1	9
F.	YES	NO	Police Emergency Response	5	4	3	2	1	9
G.	YES	NO	Fire Emergency Response	5	4	3	2	1	9
H.	YES	NO	Village Hall (General)	5	4	3	2	1	9
I.	YES	NO	Streets & Grounds	5	4	3	2	1	9

2. Which THREE of the services or Village departments listed above are the most important to your business?

1st: _____ 2nd: _____ 3rd: _____

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

_____ (1) Significantly higher than your expectations

_____ (2) Higher than your expectations

_____ (3) Meets your expectations

_____ (4) Below your expectations

_____ (5) Significantly below your expectations

_____ (9) Don't know/Unsure

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

		Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
A.	Supporting business growth and development	5	4	3	2	1	9
B.	Availability of employee and customer parking around your business	5	4	3	2	1	9
C.	Condition of sidewalks	5	4	3	2	1	9
D.	Creating and promoting special events	5	4	3	2	1	9
E.	Historic preservation efforts	5	4	3	2	1	9
F.	Cleanliness of streets	5	4	3	2	1	9
G.	Landscape maintenance in rights of way and public areas	5	4	3	2	1	9

5. **PERCEPTIONS OF THE VILLAGE.** Several items that may influence your business’s perceptions of the Village of Pinehurst are listed below. Please rate each item on a scale of 1 to 5, where 5 means “Very Satisfied” and 1 means “Very Dissatisfied.”

		Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don’t Know
A.	Overall image of the Village	5	4	3	2	1	9
B.	Overall quality of life	5	4	3	2	1	9
C.	Overall feeling of safety during the daytime	5	4	3	2	1	9
D.	Overall feeling of safety during the evening/night	5	4	3	2	1	9

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

- (1) Very likely
 (4) Not likely
 (2) Likely
 (5) Not likely at all
 (3) Somewhat likely
 (9) Don’t know/Unsure

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

- (1) Better
 (4) Worse
 (2) No change, but good
 (9) Don’t know/Unsure
 (3) No change, but poor

8. **CUSTOMER SERVICE.** Overall, how would you rate the Village of Pinehurst customer service? Would you say it is:

- (1) Very good
 (4) Very poor
 (2) Good
 (9) Don’t know/Unsure
 (3) Poor

9. Thinking about your most recent contact with Village government staff, please rate your experience on the following scale of 1 to 5, where 5 means “Strongly Agree” and 1 means “Strongly Disagree.”

		Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don’t Know
A.	Village staff was responsive to my needs	5	4	3	2	1	9
B.	Village staff was competent and professional	5	4	3	2	1	9
C.	Village staff was courteous	5	4	3	2	1	9

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

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

11. Have you visited the Village’s website (www.vopnc.org) during the last 12 months?

- (1) Yes (answer Q12A through C)
 (9) Don’t know/Unsure
 (2) No (skip to Q14)

12. Using a scale of 1 to 5, where 5 means “Very Good” and 1 means “Very Poor”, please rate the Village website on the following characteristics:

		Very Good	Good	Average	Poor	Very Poor	Don't Know
A.	Easy to navigate	5	4	3	2	1	9
B.	Informative content	5	4	3	2	1	9
C.	Useful	5	4	3	2	1	9

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

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

14. Please indicate the best ways for the Village to communicate with you to get important information to your business. (check all that apply)

- | | |
|-----------------------------|--|
| _____ (1) Direct mail | _____ (6) Personal calls and/or visits |
| _____ (2) Village website | _____ (7) Newsletters |
| _____ (3) Email | _____ (8) Brochures |
| _____ (4) Merchant meetings | _____ (9) Other _____ |
| _____ (5) Social media | |

15. **COMMUNITY DEVELOPMENT.** Using a scale of 1 to 5, where 5 means “Very Satisfied” and 1 means “Very Dissatisfied”, please indicate how satisfied your business is with the following Village codes and ordinances:

		Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
A.	Zoning ordinances	5	4	3	2	1	9
B.	Business signage regulations	5	4	3	2	1	9
C.	Historic District Guidelines	5	4	3	2	1	9

16. **CULTURE/ENTERTAINMENT.** Using a scale of 1 to 3, where 3 means “Too Few” and 1 means “Too Many”, please indicate if you feel there are an appropriate amount of the following in the Village Center:

		Too Few	About the Right Amount	Too Many	Don't Know
A.	Restaurants	3	2	1	9
B.	Evening entertainment venues	3	2	1	9
C.	Cultural activities (live music, art festivals, etc.)	3	2	1	9
D.	Family friendly activities (movies in the park, etc.)	3	2	1	9
E.	Major special events (Holly Arts and Crafts Festival, parades, etc.)	3	2	1	9

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

- _____ (1) Very satisfied
- _____ (2) Satisfied
- _____ (3) Neutral

- _____ (4) Dissatisfied
- _____ (5) Very dissatisfied
- _____ (9) Don't know/Unsure

18. **DEMOGRAPHIC/OTHER INFORMATION.** Please indicate the primary business category for your business:

- _____ (1) Retail
- _____ (2) Restaurants and Food Services
- _____ (3) Inn
- _____ (4) Professional, Scientific, and Technical Services

- _____ (5) Financial and Insurance
- _____ (6) Real Estate and Rental Leasing
- _____ (7) Health Care and Social Assistance
- _____ (8) Arts, Entertainment, and Recreation
- _____ (9) Other: _____

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

- _____ (1) 0-5 years
- _____ (2) 6-10 years
- _____ (3) 11-15 years

- _____ (4) 16-20 years
- _____ (5) 20+ years

20. Please answer the following questions:

		Yes	No
A.	Are you a member of Pinehurst Business Partners?	1	2
B.	Are you a member of the Moore County Chamber of Commerce?	1	2
C.	Is your business located in the Village Center?	1	2

21. Using a scale of 1 to 5, where 5 means "Extremely Important" and 1 means "Not Important", please indicate how important each of the following reasons were in your decision to locate your business in the Village of Pinehurst:

		Extremely Important	Very Important	Important	Less Important	Not Important
A.	Overall image of the Village	5	4	3	2	1
B.	Low crime rate	5	4	3	2	1
C.	Availability of trained employees	5	4	3	2	1
D.	Level of taxation	5	4	3	2	1
E.	Affordable rent	5	4	3	2	1
F.	Attitude of local government towards businesses	5	4	3	2	1

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 and will be used to help guide improvements in Village services, allowing us to serve you better. The information to the right will ONLY be used to help identify the level of satisfaction with Village services in your area.