

2013 Business Survey

FINAL Report



HISTORY, CHARM, AND SOUTHERN HOSPITALITY_____

conducted for
The Village of
Pinehurst, North Carolina

by

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November, 2013

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Purpose and Methodology

A business survey was administered for The Village of Pinehurst to all businesses located within the Village limits during October and November of 2013. The survey was administered for the second time as part of an effort to assess business satisfaction with the quality of Village services and to measure Trends from the results of the first survey. 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 900 businesses in the Village of Pinehurst. Of the 900 businesses, 77 completed the survey (47 by mail and 30 by phone). The physical length of the survey was shorter this year because it was printed, compared to the electronic survey of 2012, but most of the same questions were asked as well as some additional questions. Business surveys are difficult to gather and this number represents a good sampling of businesses in the Village.

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:

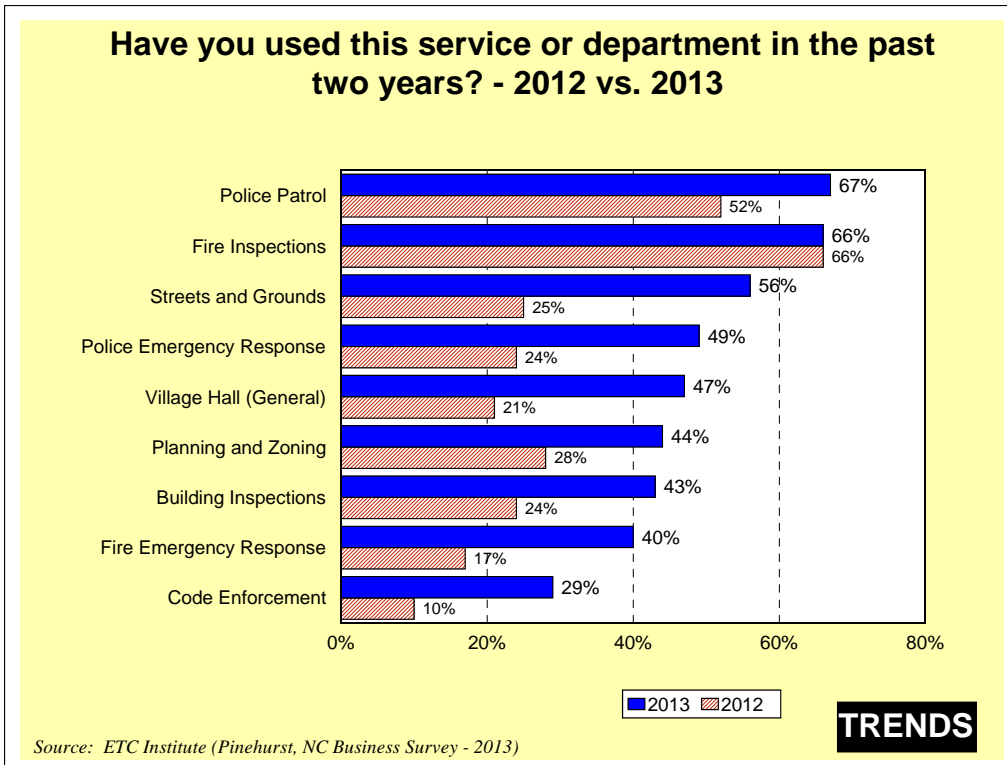
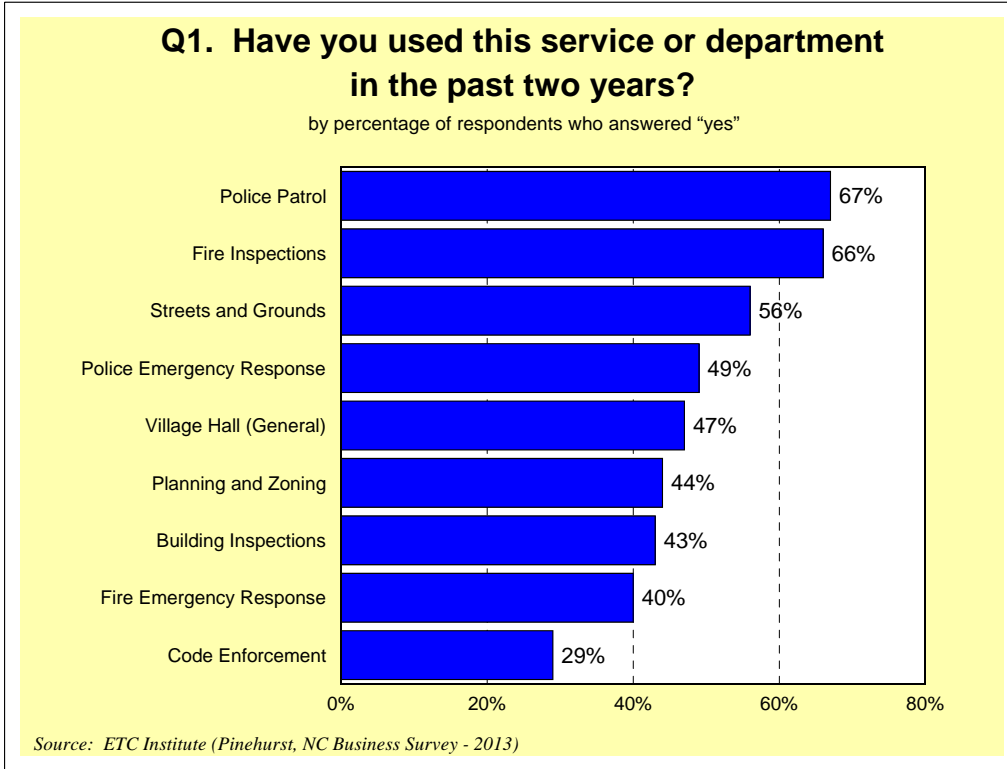
- a summary of the methodology for administering the survey and major findings
- charts and graphs for each question on the survey
- importance-satisfaction analysis
- tables that show the results for each question on the survey
- a copy of the survey instrument.

Major Findings

- **Business satisfaction with Village services.** The greatest number of businesses had experience with police patrol (67%) and Fire Inspections (66%) over the past year, and satisfaction was highest in building inspections (93%) and fire emergency responses (90%). It should be noted that because of the broader coverage of the survey this year, the use of these services was much greater.
- **Services that businesses thought should receive the most increase in emphasis over the next two years.** The areas that businesses thought should receive the most increase in emphasis from the Village of Pinehurst over the next two years were: (1) police patrol, (2) fire emergency response, and (3) police emergency response.
- **57% felt the Village met their expectations with the overall quality of services provided, compared to 52% in 2012.**
- **Satisfaction with Various Village Services.** Most (92%) of the businesses surveyed *who had an opinion* indicated that they were satisfied with the landscaping maintenance in right of ways and public areas; 91% were satisfied with the cleanliness of streets, and 75% were satisfied with the condition of sidewalks. Businesses were least satisfied with the availability of employee and customer parking around their business (49%).
- **Perceptions of the Village.** Most (98%) of the businesses surveyed *who had an opinion* indicated that they were satisfied with the overall feeling of safety during the day time; 91% were satisfied with the overall quality of life, and 89% were satisfied with the overall feeling of safety in the Village in the evening.
- **32% would be very likely, 34% would be likely, and 18% would be somewhat likely to recommend the Village as a business location to family and friends.**
- **39% rated the overall business atmosphere in the Village as better than two years ago (up from 31% in 2012).**
- **33% rated as very good and 51% rated as good, Village customer service.**
- **Level of Agreement with Statements About the Village.** Eighty-seven percent (87%) of the businesses surveyed who had an opinion were in agreement (rating of 4 or 5 on a 5-point scale) with courtesy of the Village staff, 82% were satisfied with the competence and professionalism of Village staff, and 78% were satisfied with the responsiveness to their needs.
- **Satisfaction with Village Communications with Businesses.** Sixty-three percent (63%) of the businesses surveyed who had an opinion were satisfied, 21% were neutral and 7% were dissatisfied with communications. Nine percent (9%) did not have an opinion.

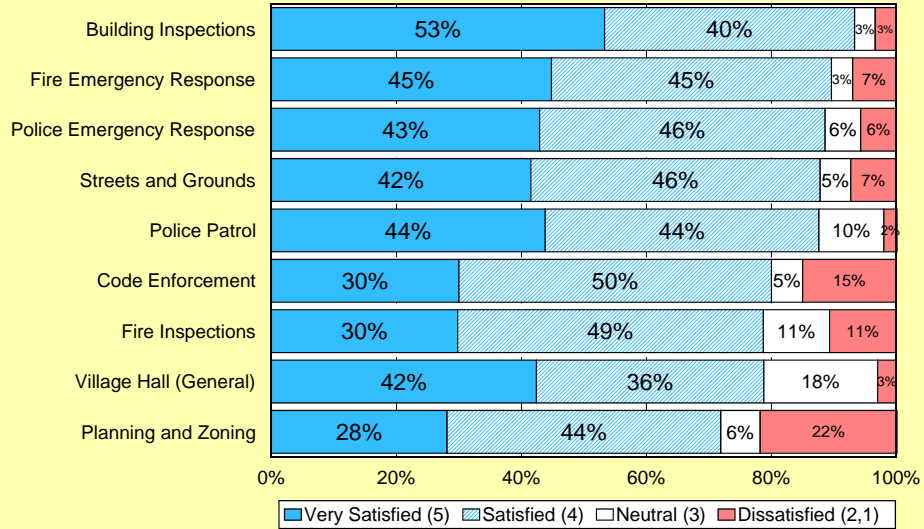
- **Email and direct mail were indicated as the best way to communicate important information to businesses.**
- **75% were satisfied with the website, compared to 38% in 2012.**
- **Community Development (Codes and Ordinances)** Fifty percent (50%) of the businesses *who had an opinion* were satisfied (rating of 4 or 5 on a 5-point scale) with the zoning ordinances, 50% were satisfied with the historic district guidelines, and 45% were satisfied with business signage and regulations.
- **Amount of Various Cultural and Entertainment Opportunities** Seventy-nine percent (77%) of the businesses surveyed rated as “the right amount” major special events, 64% rated as “the right amount” restaurants in the Village, but 48% rated as “too few”, family friendly activities.
- **30% were very satisfied and 47% were satisfied with how the Village handles events that attract large crowds to the Village.**
- **Of the 77 businesses that responded, 20 had been in the Village 20 years or more.**
- **Importance of Various Reasons to Locate the Business in the Village** Ninety-two percent (92%) indicated that a low crime rate was the most important, 91% said the image of the Village was second, and 83% said the attitude of local government towards businesses to the location of their business in the Village.

Section 1:
Charts and Graphs



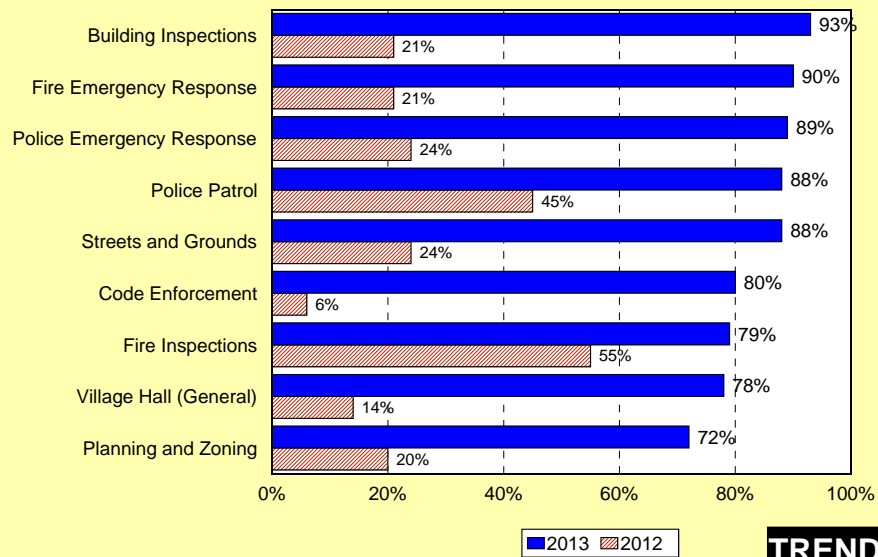
Q1. Overall Satisfaction with Pinehurst Services or Departments Used in the Past Two Years

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 - 2013)

Overall Satisfaction with Pinehurst Services or Departments Used in the Past Two Years - 2012 vs. 2013

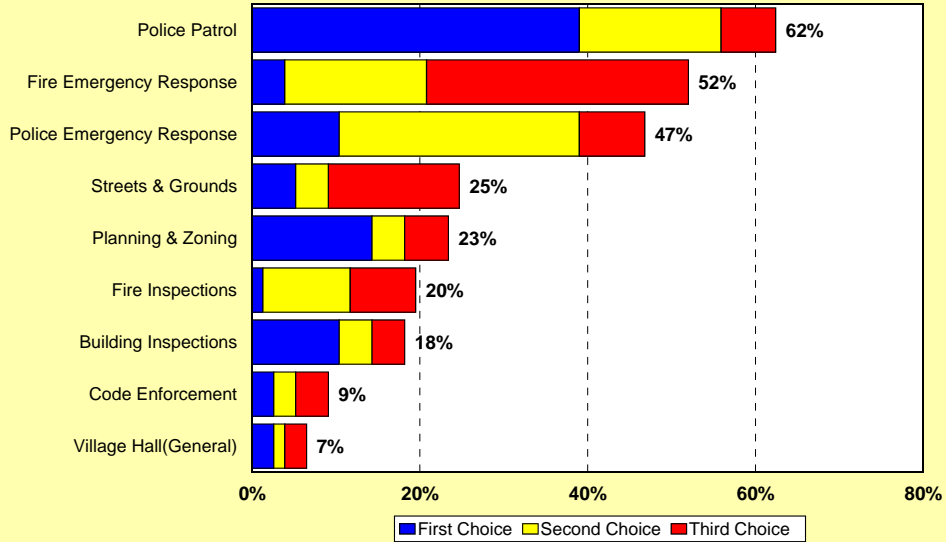


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

TRENDS

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

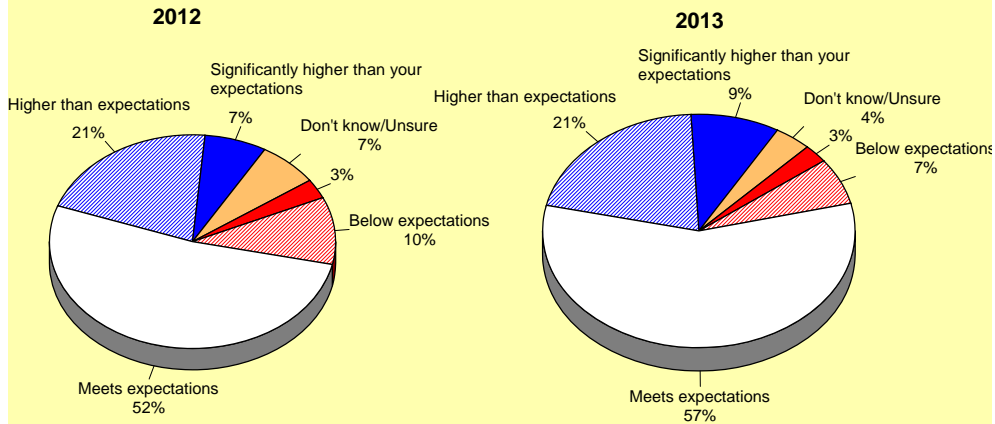
by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

Q3. Do you agree with the following statements about the overall quality of services provided to your business by the Village of Pinehurst?

by percentage of respondents who answered "yes"

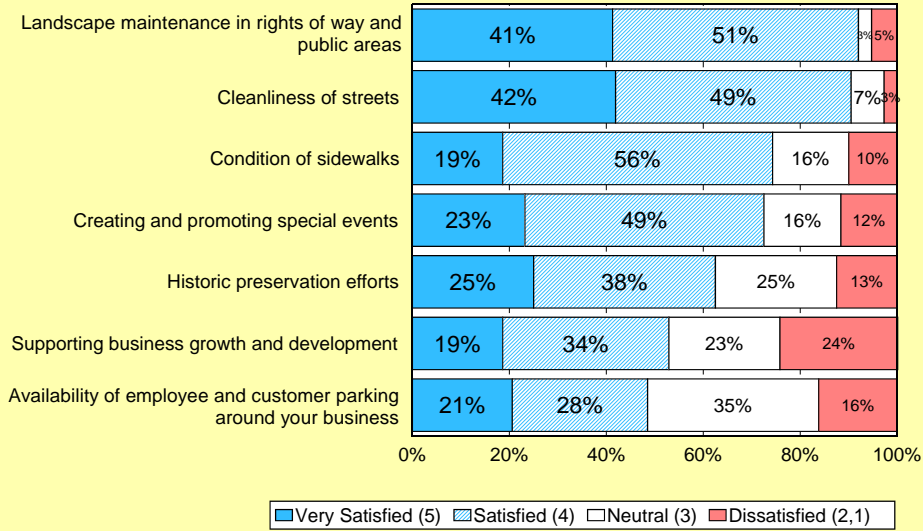


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

TRENDS

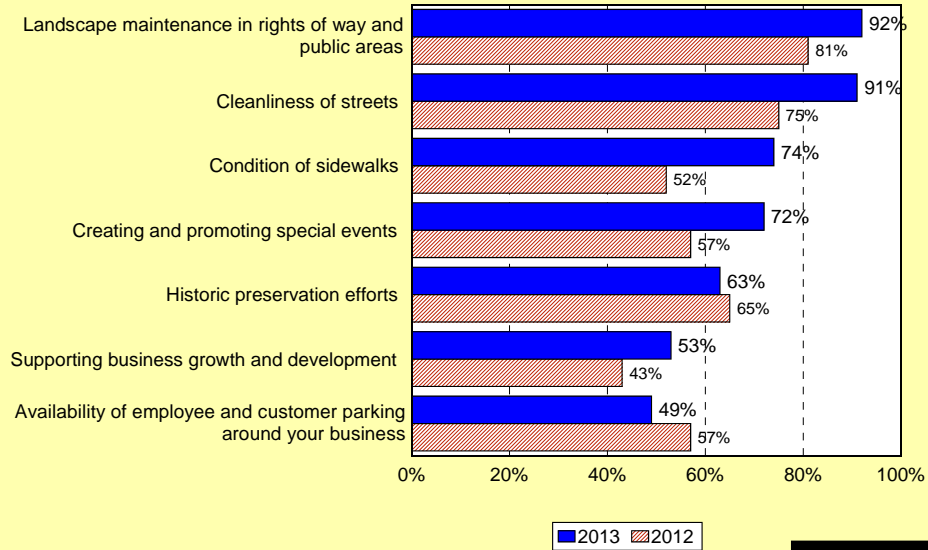
Q4. Level of Satisfaction with the Village in Various Areas

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



Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

Level of Satisfaction with the Village in Various Areas 2012 vs. 2013

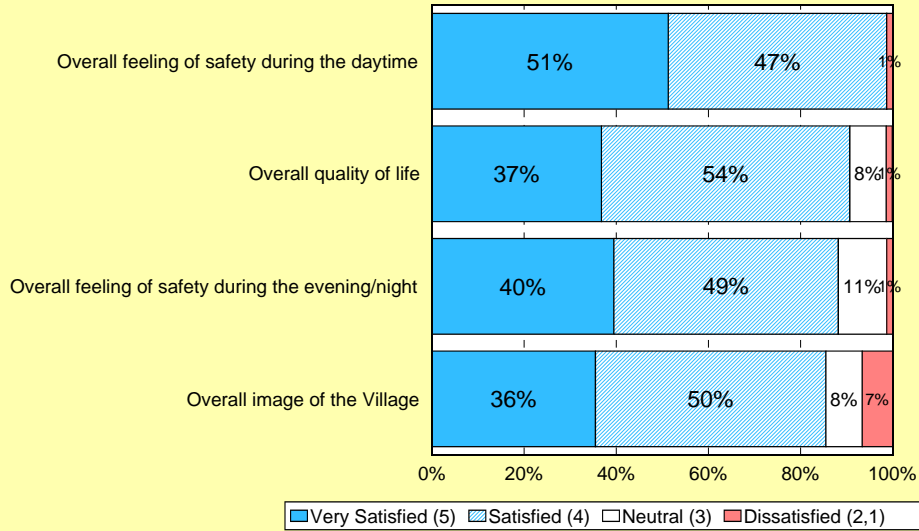


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

TRENDS

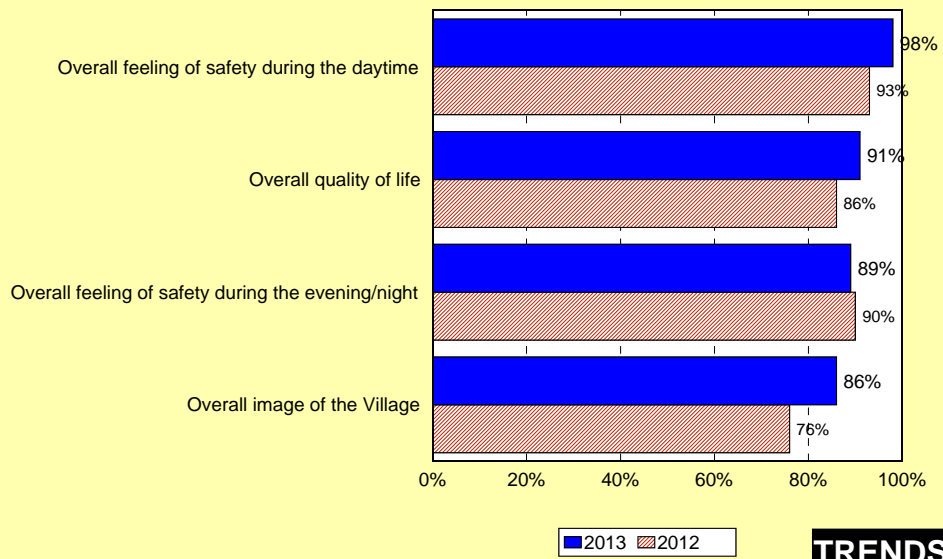
Q5. Overall Satisfaction with Various Perceptions of the Village of Pinehurst

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 - 2013)

Overall Satisfaction with Various Perceptions of the Village of Pinehurst - 2012 vs. 2013

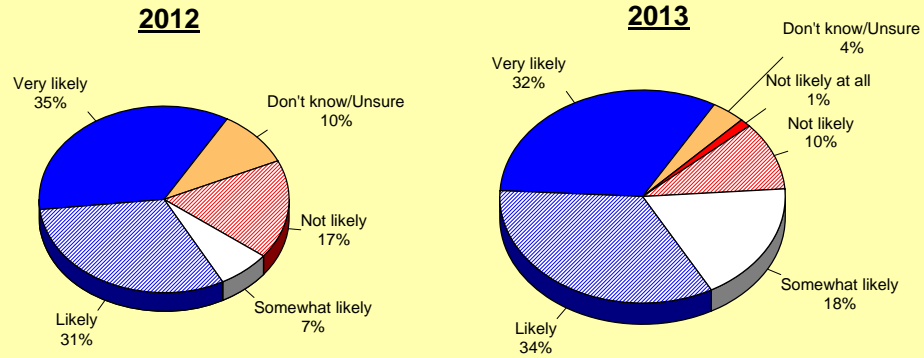


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

TRENDS

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

by percentage of respondents

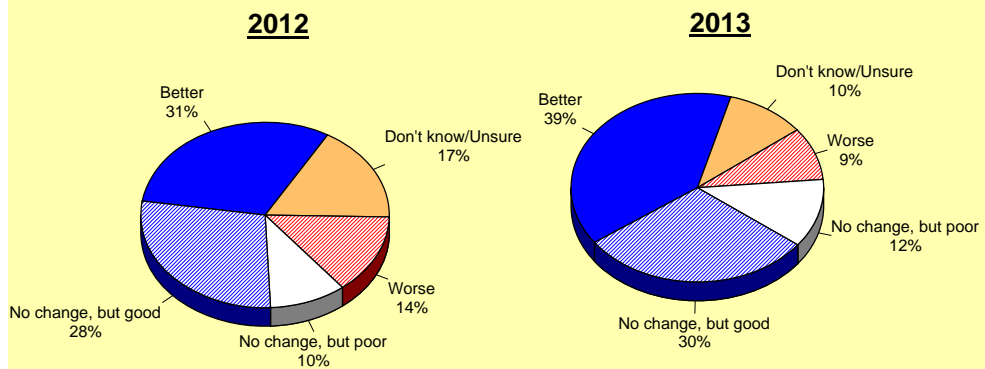


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

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

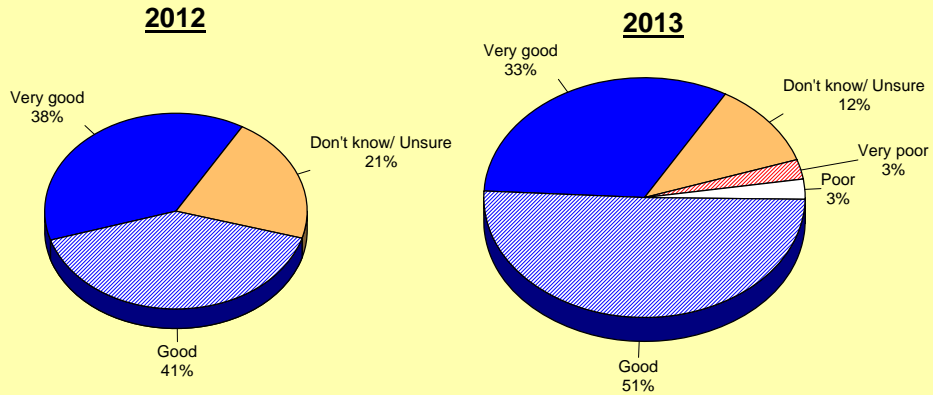


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

TRENDS

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

by percentage of respondents

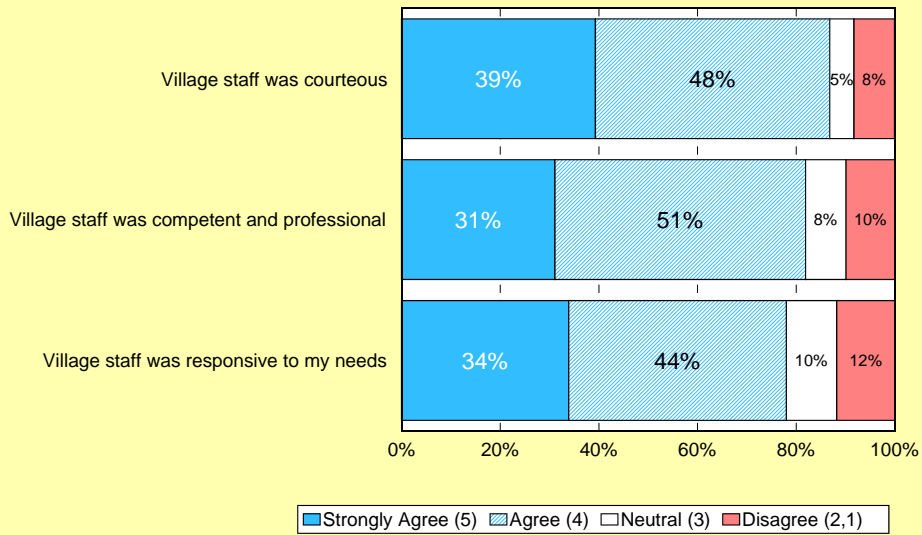


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

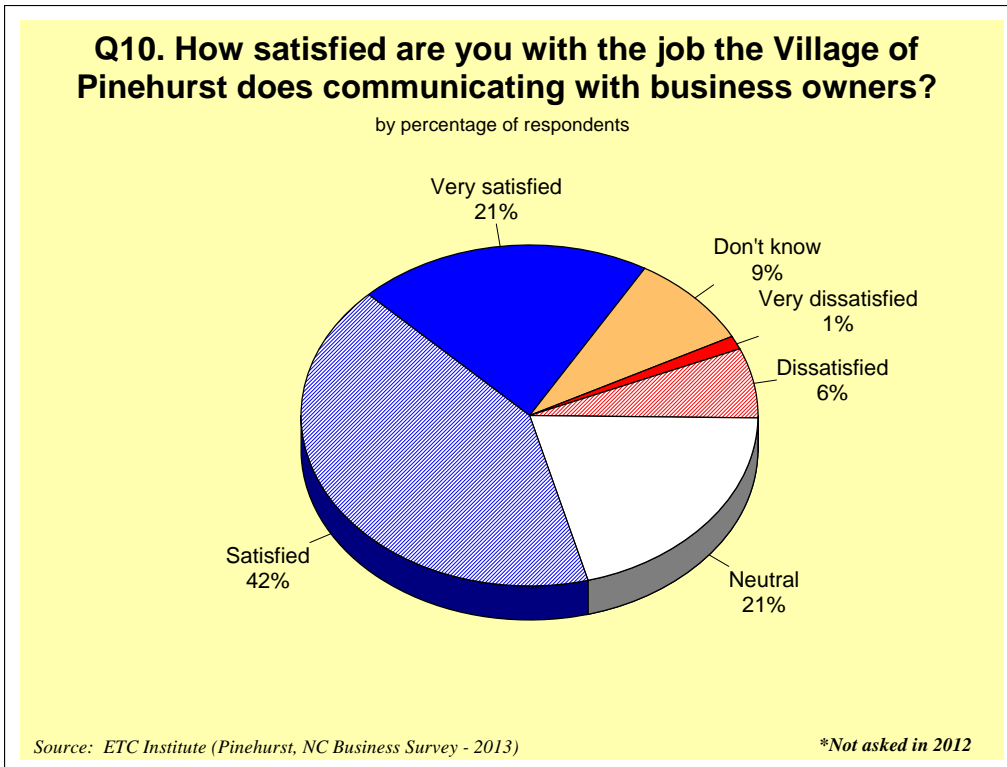
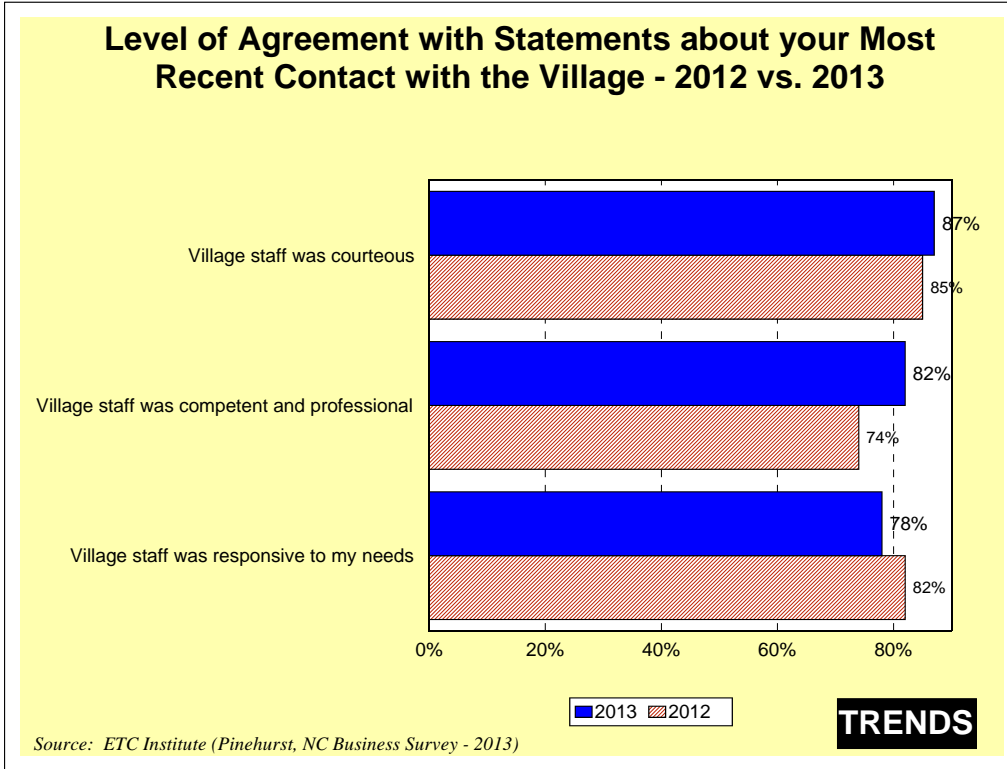
TRENDS

Q9. Level of Agreement with Statements about your Most Recent Contact with the Village

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

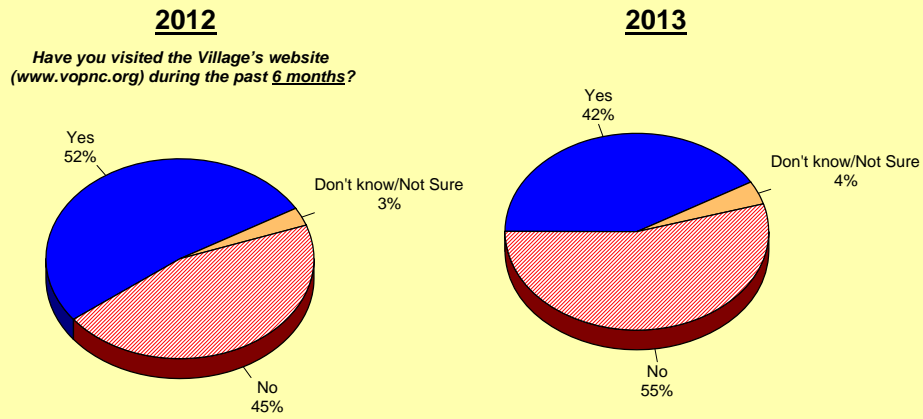


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)



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

by percentage of respondents

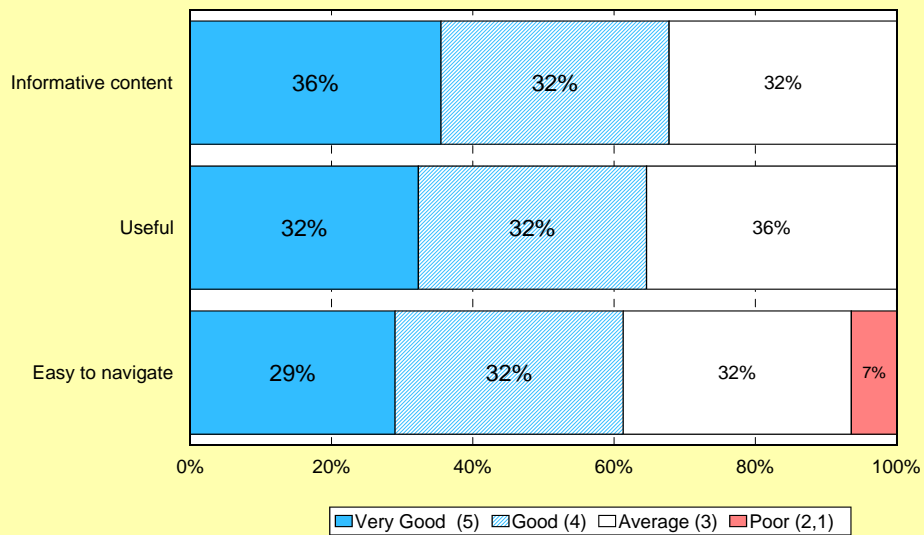


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

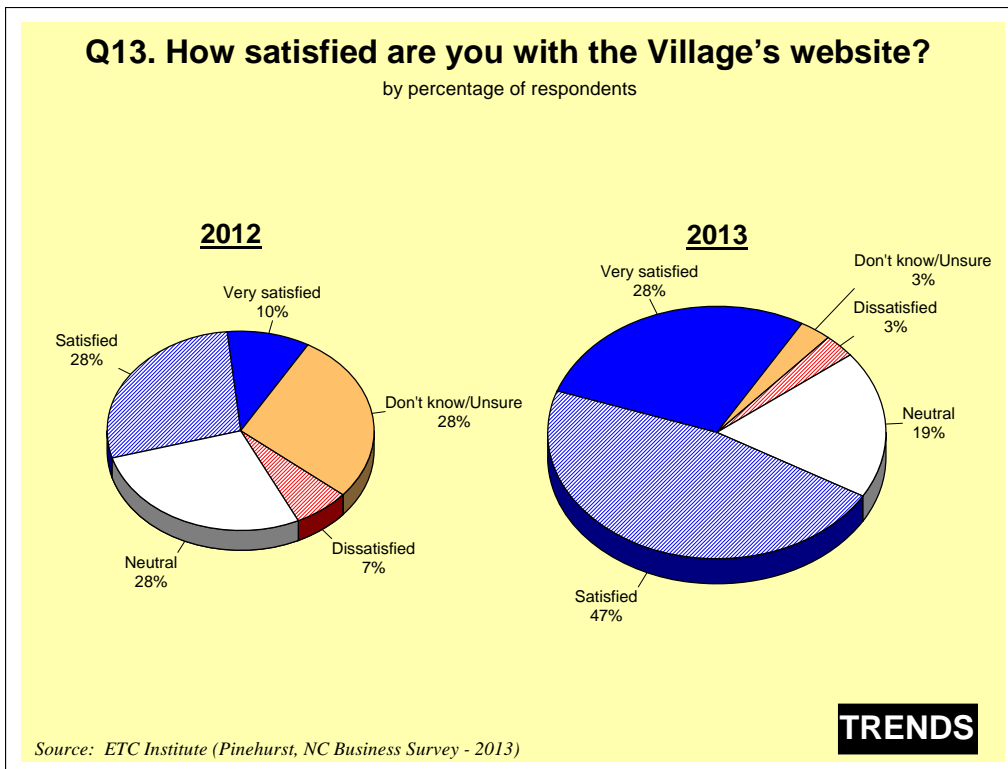
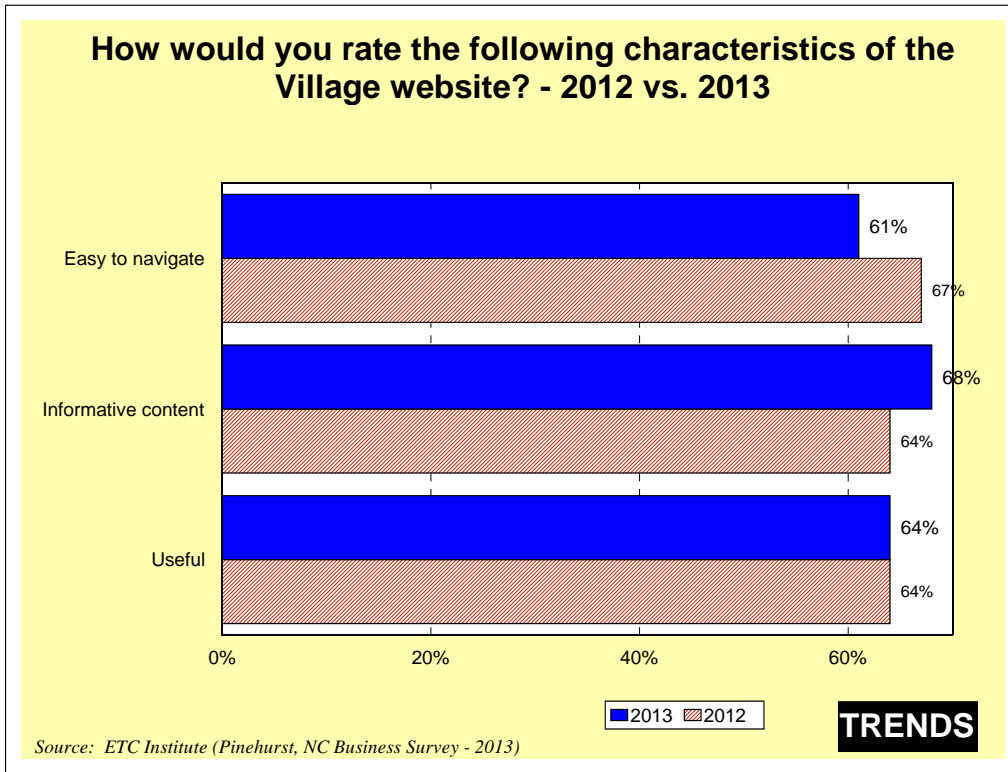
TRENDS

Q12. How would you rate the following characteristics of the Village website?

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

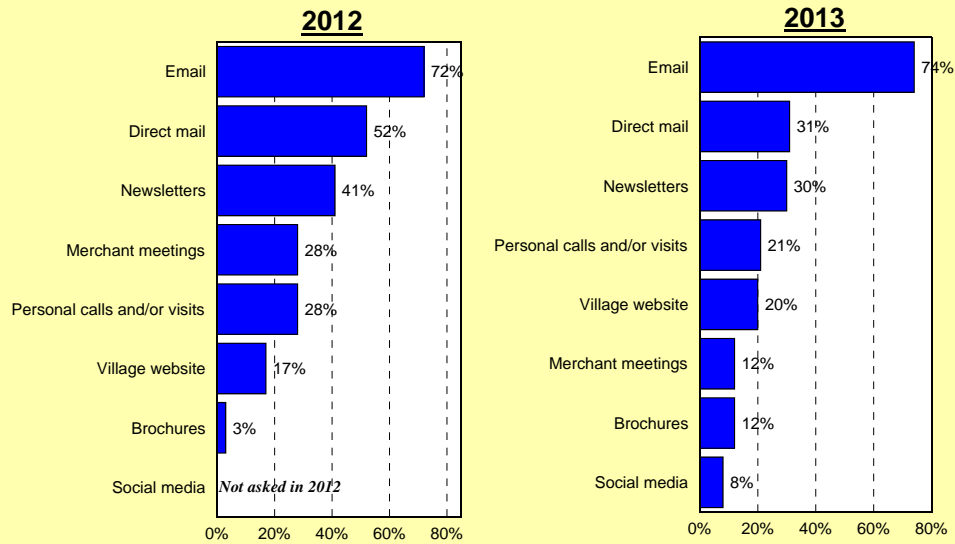


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)



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)

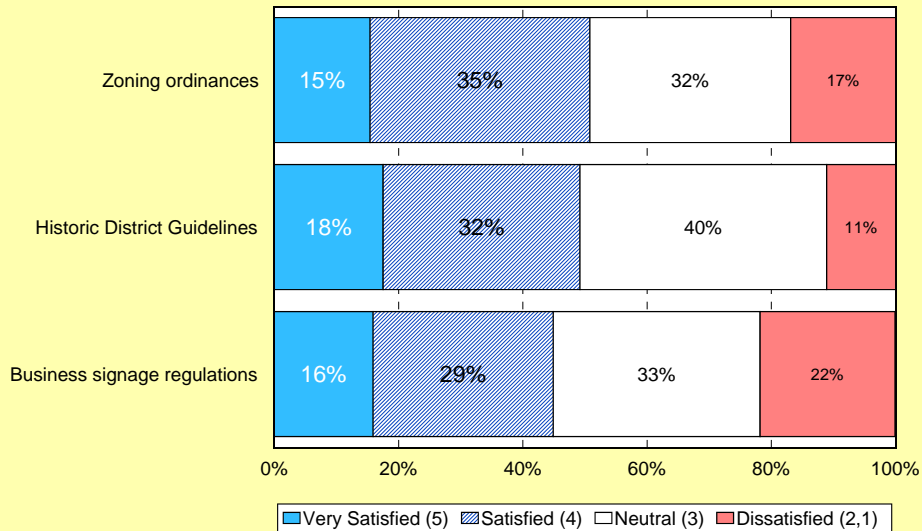


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

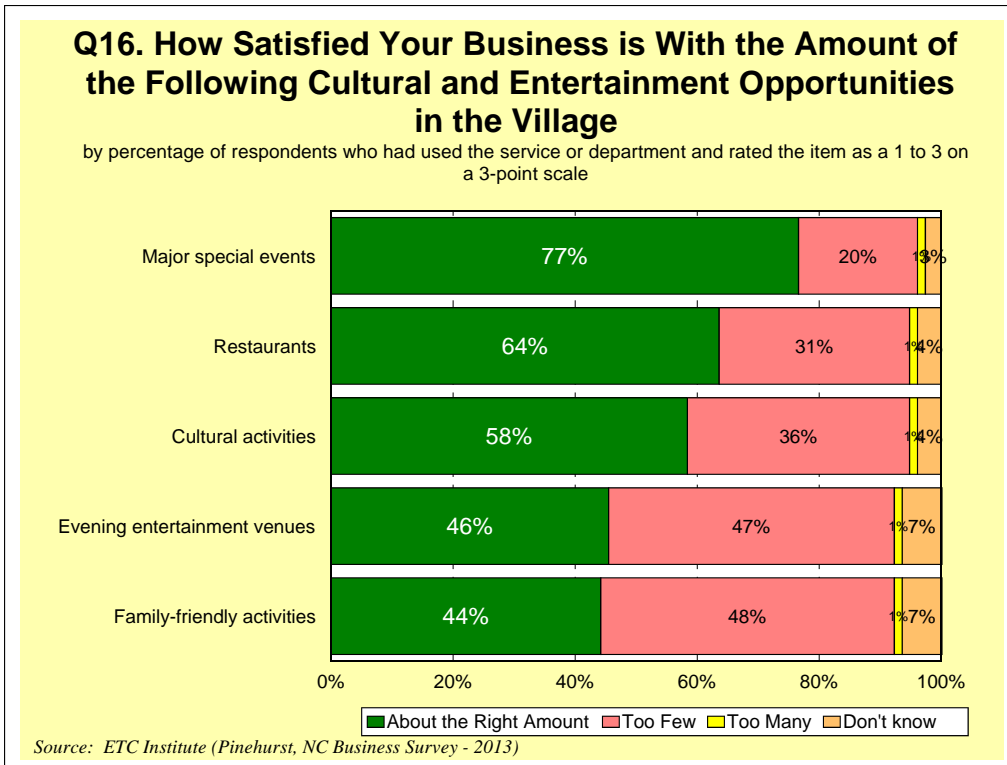
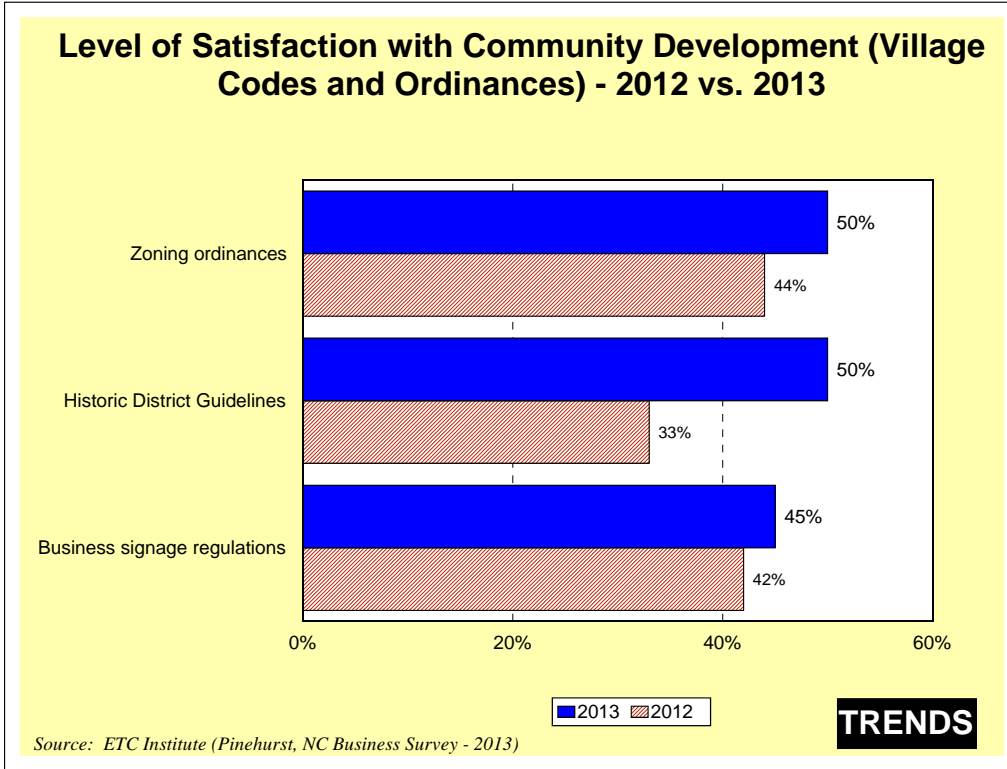
TRENDS

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")

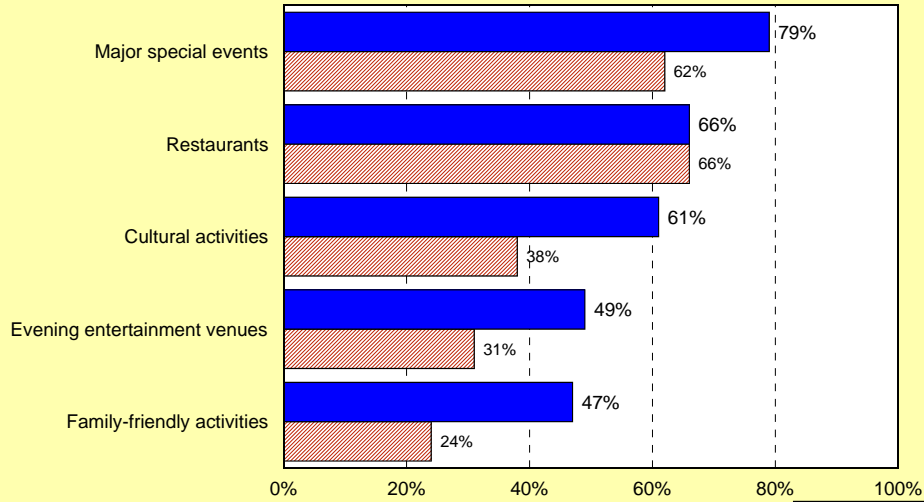


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)



How Satisfied your Business is with the Amount of the Following Cultural and Entertainment Opportunities in the Village - 2012 vs. 2013

by percentage of respondents who rated the item as a 3 ("about the right amount") on a 3-point scale



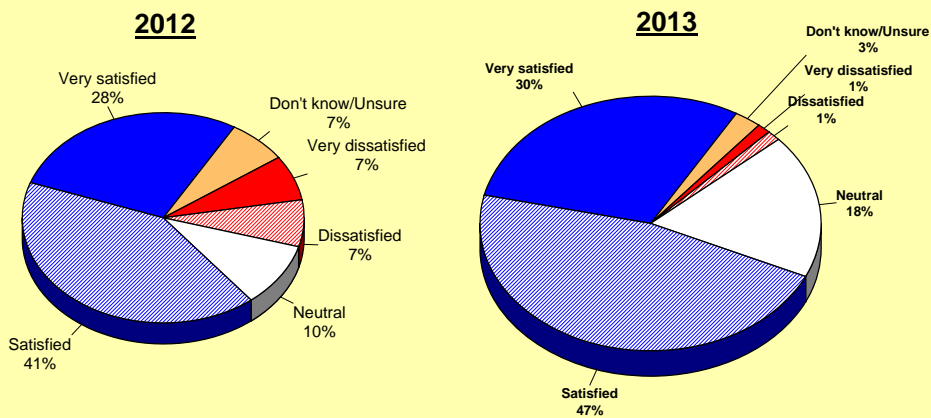
Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

■ 2013 ■ 2012

TRENDS

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

by percentage of respondents

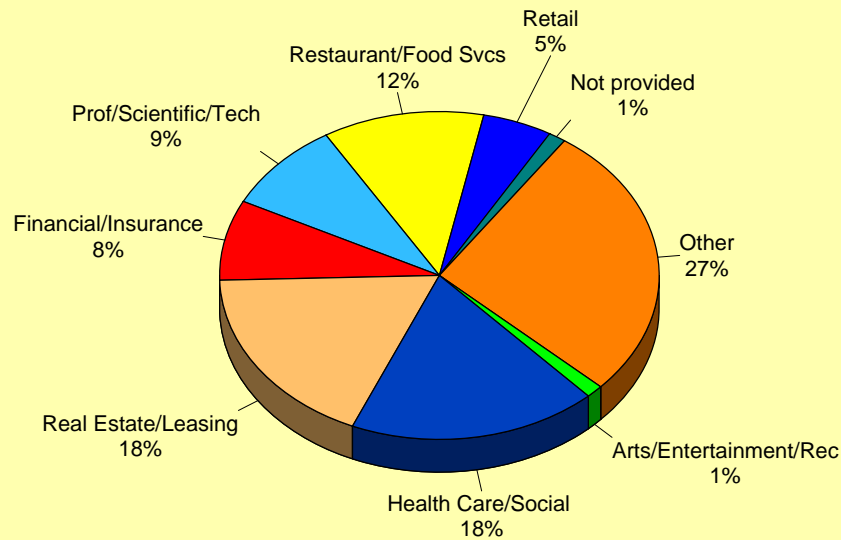


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

TRENDS

Q18. Primary Business Category for Your Business

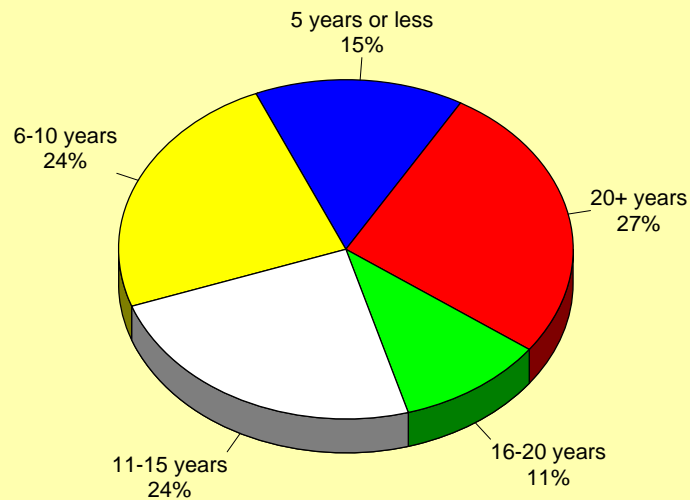
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

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

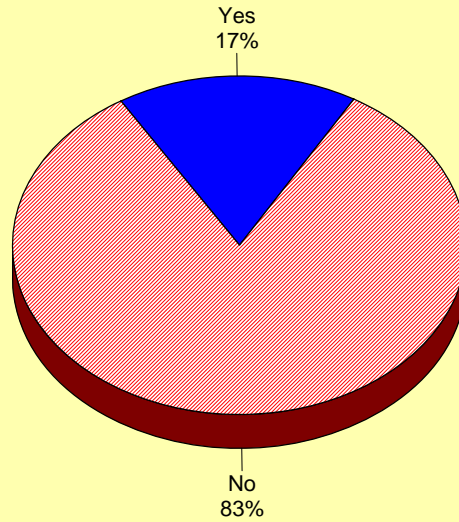
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

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

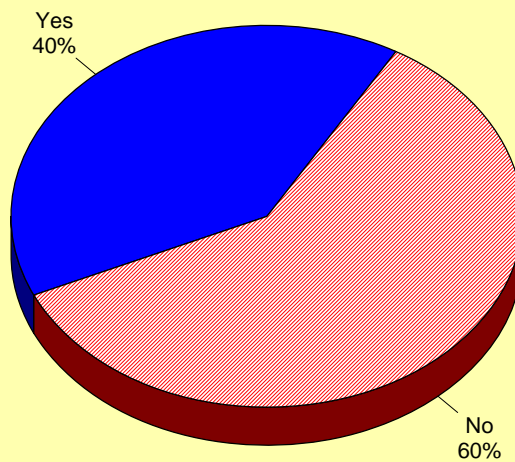
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

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

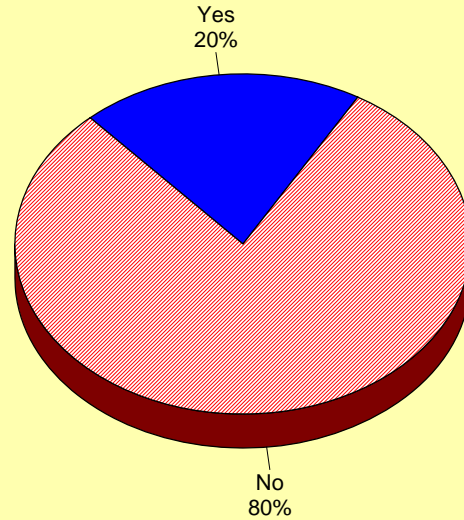
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

Q20c. Is your business located in the Village Center?

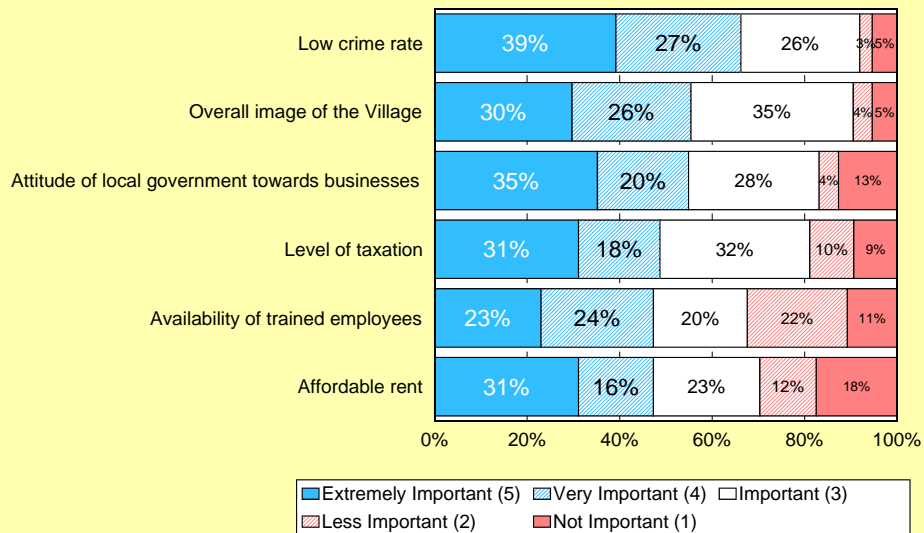
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

Q21. Importance of Various Reasons in Your Decision to Locate Your Business in the Village of Pinehurst

by percentage of respondents who rated the item as a 1 to 5 on a 5-point scale (without "not provided")



Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

Section 2:
Importance-Satisfaction
Analysis



Importance-Satisfaction Analysis

Businesses of The 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 their 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 cities 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 City to emphasize over the next two years. This sum is then multiplied by 1 minus the percentage of Businesses that indicated they were positively satisfied with the City'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. $[IS=Importance \times (1-Satisfaction)]$.

Example of the Calculation. Businesses were asked to identify the major categories of City services they thought should receive the most emphasis over the next two years, twenty-two percent (62%) ranked "Police Patrol" as one of the most important service to emphasize over the next two years.

With regard to satisfaction, “Police Patrol” was ranked second overall with 88% rating “Police Patrol” as a “4” or a “5” on a 5-point scale excluding “Don’t know” responses. 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, 62% was multiplied by 12% (1-0.88). This calculation yielded an I-S rating of **0.0774**, which was ranked first out of nine major service categories.

The maximum rating is 1.00 and would be achieved when 100% of the Businesses 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 Businesses were positively satisfied with the delivery of the service
- if none (0%) of the Businesses selected the service as one of the three most important areas for the City to emphasize over the next two years.

Interpreting the Ratings

Ratings that are greater than or equal to 0.20 identify areas that should receive significantly more emphasis over the next two years. Ratings from .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 the Village of Pinehurst are provided on the following page.

Importance-Satisfaction Rating

Village of Pinehurst Business

OVERALL

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<i>Medium Priority (IS <.10)</i>						
Police Patrol	62%	1	88%	5	0.0774	1
Planning and Zoning	23%	5	72%	9	0.0658	2
Fire Emergency Response	52%	2	90%	2	0.0541	3
Police Emergency Response	47%	3	89%	3	0.0534	4
Fire Inspections	20%	6	79%	7	0.0415	5
Streets and Grounds	25%	4	88%	4	0.0301	6
Code Enforcement	9%	8	80%	6	0.0182	7
Village Hall (General)	7%	9	78%	8	0.0143	8
Building Inspections	18%	7	93%	1	0.0122	9

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

Most Important %:

The "Most Important" percentage represents the sum of the first, second, and third most important responses for each item. Respondents were asked to identify the items they thought should 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 know'. Respondents ranked their level of satisfaction with 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.

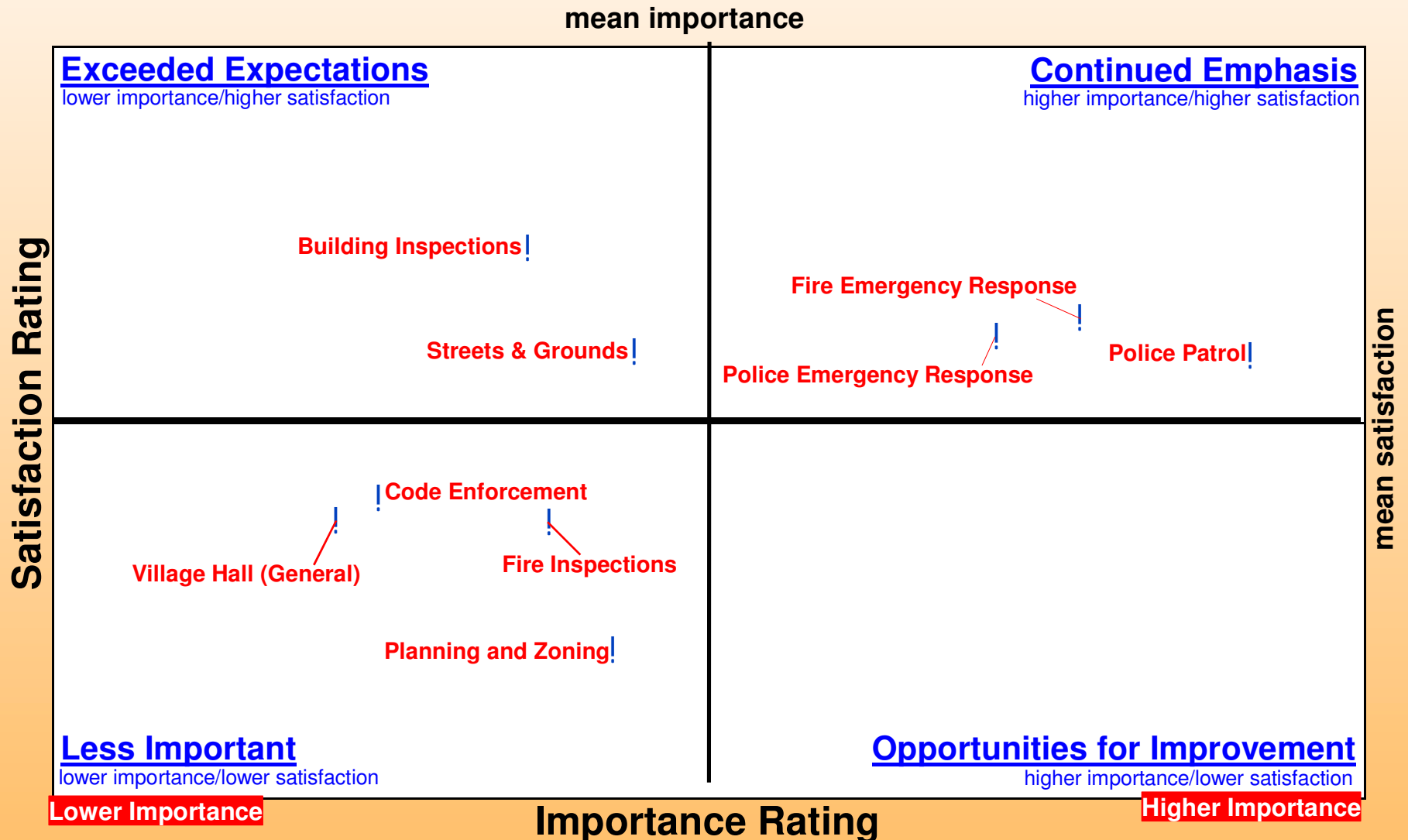
- **Continued Emphasis (above average importance and above average satisfaction).** This area shows where the Village is meeting customer expectations. Items in this area have a significant impact on the customer's overall level of satisfaction. The Village should maintain (or slightly increase) emphasis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

2013 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,
Survey Instrument

2013 Business Survey – Village of Pinehurst

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	42.9%	57.1%
Q1b. Fire Inspections	66.2%	33.8%
Q1c. Planning & Zoning	44.2%	55.8%
Q1d. Code Enforcement	28.9%	71.1%
Q1e. Police Patrol	67.1%	32.9%
Q1f. Police Emergency Response	49.4%	50.6%
Q1g. Fire Emergency Response	40.3%	59.7%
Q1h. Village Hall (General)	46.8%	53.2%
Q1i. Streets & Grounds	55.8%	44.2%

2013 Business Survey – Village of Pinehurst

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=68)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q1a. Building Inspections	48.5%	36.4%	3.0%	0.0%	3.0%	9.1%
Q1b. Fire Inspections	28.0%	46.0%	10.0%	6.0%	4.0%	6.0%
Q1c. Planning & Zoning	26.5%	41.2%	5.9%	11.8%	8.8%	5.9%
Q1d. Code Enforcement	26.1%	43.5%	4.3%	13.0%	0.0%	13.0%
Q1e. Police Patrol	41.2%	41.2%	9.8%	2.0%	0.0%	5.9%
Q1f. Police Emergency Response	39.5%	42.1%	5.3%	5.3%	0.0%	7.9%
Q1g. Fire Emergency Response	41.9%	41.9%	3.2%	3.2%	3.2%	6.5%
Q1h. Village Hall (General)	38.9%	33.3%	16.7%	2.8%	0.0%	8.3%
Q1i. Streets & Grounds	39.5%	44.2%	4.7%	2.3%	4.7%	4.7%

2013 Business Survey – Village of Pinehurst

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=68)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q1a. Building Inspections	53.3%	40.0%	3.3%	0.0%	3.3%
Q1b. Fire Inspections	29.8%	48.9%	10.6%	6.4%	4.3%
Q1c. Planning & Zoning	28.1%	43.8%	6.3%	12.5%	9.4%
Q1d. Code Enforcement	30.0%	50.0%	5.0%	15.0%	0.0%
Q1e. Police Patrol	43.8%	43.8%	10.4%	2.1%	0.0%
Q1f. Police Emergency Response	42.9%	45.7%	5.7%	5.7%	0.0%
Q1g. Fire Emergency Response	44.8%	44.8%	3.4%	3.4%	3.4%
Q1h. Village Hall (General)	42.4%	36.4%	18.2%	3.0%	0.0%
Q1i. Streets & Grounds	41.5%	46.3%	4.9%	2.4%	4.9%

2013 Business Survey – Village of Pinehurst

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

<u>Q2. Top choice</u>	<u>Number</u>	<u>Percent</u>
Building Inspections	8	10.4 %
Fire Inspections	1	1.3 %
Planning & Zoning	11	14.3 %
Code Enforcement	2	2.6 %
Police Patrol	30	39.0 %
Police Emergency Response	8	10.4 %
Fire Emergency Response	3	3.9 %
Village Hall (General)	2	2.6 %
Streets & Grounds	4	5.2 %
None chosen	8	10.4 %
Total	77	100.0 %

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

<u>Q2. 2nd choice</u>	<u>Number</u>	<u>Percent</u>
Building Inspections	3	3.9 %
Fire Inspections	8	10.4 %
Planning & Zoning	3	3.9 %
Code Enforcement	2	2.6 %
Police Patrol	13	16.9 %
Police Emergency Response	22	28.6 %
Fire Emergency Response	13	16.9 %
Village Hall (General)	1	1.3 %
Streets & Grounds	3	3.9 %
None chosen	9	11.7 %
Total	77	100.0 %

2013 Business Survey – Village of Pinehurst

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

<u>Q2. 3rd choice</u>	<u>Number</u>	<u>Percent</u>
Building Inspections	3	3.9 %
Fire Inspections	6	7.8 %
Planning & Zoning	4	5.2 %
Code Enforcement	3	3.9 %
Police Patrol	5	6.5 %
Police Emergency Response	6	7.8 %
Fire Emergency Response	24	31.2 %
Village Hall (General)	2	2.6 %
Streets & Grounds	12	15.6 %
None chosen	12	15.6 %
Total	77	100.0 %

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

<u>Q2. Top choice</u>	<u>Number</u>	<u>Percent</u>
Building Inspections	14	18.2 %
Fire Inspections	15	19.5 %
Planning & Zoning	18	23.4 %
Code Enforcement	7	9.1 %
Police Patrol	48	62.3 %
Police Emergency Response	36	46.8 %
Fire Emergency Response	40	51.9 %
Village Hall (General)	5	6.5 %
Streets & Grounds	19	24.7 %
None chosen	8	10.4 %
Total	210	

2013 Business Survey – Village of Pinehurst

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:

<u>Q3. How satisfied are you with overall quality of services provided to your business</u>	<u>Number</u>	<u>Percent</u>
Significantly higher than your expectations	7	9.1 %
Higher than your expectations	16	20.8 %
Meets your expectations	44	57.1 %
Below your expectations	5	6.5 %
Significantly below your expectations	2	2.6 %
Don't know/Unsure	3	3.9 %
Total	77	100.0 %

Q3. In general, how satisfied are you with the overall quality of services provided to your business by the Village of Pinehurst? Would you say the quality of services provided is: (without "don't know/unsure")

<u>Q3. How satisfied are you with overall quality of services provided to your business</u>	<u>Number</u>	<u>Percent</u>
Significantly higher than your expectations	7	9.5 %
Higher than your expectations	16	21.6 %
Meets your expectations	44	59.5 %
Below your expectations	5	6.8 %
Significantly below your expectations	2	2.7 %
Total	74	100.0 %

2013 Business Survey – Village of Pinehurst

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%	20.8%	16.9%	5.2%	9.1%
Q4b. Availability of employee & customer parking around your business	18.2%	24.7%	31.2%	7.8%	6.5%	11.7%
Q4c. Condition of sidewalks	16.9%	50.6%	14.3%	6.5%	2.6%	9.1%
Q4d. Creating & promoting special events	20.8%	44.2%	14.3%	9.1%	1.3%	10.4%
Q4e. Historic preservation efforts	23.4%	35.1%	23.4%	7.8%	3.9%	6.5%
Q4f. Cleanliness of streets	40.3%	46.8%	6.5%	2.6%	0.0%	3.9%
Q4g. Landscape maintenance in rights of way & public areas	40.3%	49.4%	2.6%	5.2%	0.0%	2.6%

2013 Business Survey – Village of Pinehurst

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	18.6%	34.3%	22.9%	18.6%	5.7%
Q4b. Availability of employee & customer parking around your business	20.6%	27.9%	35.3%	8.8%	7.4%
Q4c. Condition of sidewalks	18.6%	55.7%	15.7%	7.1%	2.9%
Q4d. Creating & promoting special events	23.2%	49.3%	15.9%	10.1%	1.4%
Q4e. Historic preservation efforts	25.0%	37.5%	25.0%	8.3%	4.2%
Q4f. Cleanliness of streets	41.9%	48.6%	6.8%	2.7%	0.0%
Q4g. Landscape maintenance in rights of way & public areas	41.3%	50.7%	2.7%	5.3%	0.0%

2013 Business Survey – Village of Pinehurst

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	35.1%	49.4%	7.8%	6.5%	1.3%
Q5b. Overall quality of life	36.4%	53.2%	7.8%	1.3%	1.3%
Q5c. Overall feeling of safety during daytime	50.6%	46.8%	0.0%	1.3%	1.3%
Q5d. Overall feeling of safety during evening/night	39.0%	48.1%	10.4%	1.3%	1.3%

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	35.5%	50.0%	7.9%	6.6%
Q5b. Overall quality of life	36.8%	53.9%	7.9%	1.3%
Q5c. Overall feeling of safety during daytime	51.3%	47.4%	0.0%	1.3%
Q5d. Overall feeling of safety during evening/night	39.5%	48.7%	10.5%	1.3%

2013 Business Survey – Village of Pinehurst

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

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

	Number	Percent
Very likely	25	32.5 %
Likely	26	33.8 %
Somewhat likely	14	18.2 %
Not likely	8	10.4 %
Not likely at all	1	1.3 %
Don't know/Unsure	3	3.9 %
Total	77	100.0 %

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? (without "don't know/unsure")

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

	Number	Percent
Very likely	25	33.8 %
Likely	26	35.1 %
Somewhat likely	14	18.9 %
Not likely	8	10.8 %
Not likely at all	1	1.4 %
Total	74	100.0 %

2013 Business Survey – Village of Pinehurst

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 Pinehurst today compared to two years ago	Number	Percent
Better	30	39.0 %
No change, but good	23	29.9 %
No change, but poor	9	11.7 %
Worse	7	9.1 %
Don't know/Unsure	8	10.4 %
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? (without "don't know/unsure")

Q7. Overall business atmosphere in Pinehurst today compared to two years ago	Number	Percent
Better	30	43.5 %
No change, but good	23	33.3 %
No change, but poor	9	13.0 %
Worse	7	10.1 %
Total	69	100.0 %

2013 Business Survey – Village of Pinehurst

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

Q8. How would you rate Pinehurst customer service	Number	Percent
Very good	25	32.5 %
Good	39	50.6 %
Poor	2	2.6 %
Very poor	2	2.6 %
Don't know/Unsure	9	11.7 %
Total	77	100.0 %

Q8. CUSTOMER SERVICE. Overall, how would you rate the Village of Pinehurst customer service? Would you say it is: (without "don't know/unsure")

Q8. How would you rate Pinehurst customer service	Number	Percent
Very good	25	36.8 %
Good	39	57.4 %
Poor	2	2.9 %
Very poor	2	2.9 %
Total	68	100.0 %

2013 Business Survey – Village of Pinehurst

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	26.0%	33.8%	7.8%	5.2%	3.9%	23.4%
Q9b. Village staff was competent & professional	24.7%	40.3%	6.5%	5.2%	2.6%	20.8%
Q9c. Village staff was courteous	31.2%	37.7%	3.9%	3.9%	2.6%	20.8%

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	33.9%	44.1%	10.2%	6.8%	5.1%
Q9b. Village staff was competent & professional	31.1%	50.8%	8.2%	6.6%	3.3%
Q9c. Village staff was courteous	39.3%	47.5%	4.9%	4.9%	3.3%

2013 Business Survey – Village of Pinehurst

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	16	20.8 %
Satisfied	32	41.6 %
Neutral	16	20.8 %
Dissatisfied	5	6.5 %
Very dissatisfied	1	1.3 %
Don't know	7	9.1 %
Total	77	100.0 %

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

Q10. How satisfied are you with Village of Pinehurst communicating with business owners

	Number	Percent
Very satisfied	16	22.9 %
Satisfied	32	45.7 %
Neutral	16	22.9 %
Dissatisfied	5	7.1 %
Very dissatisfied	1	1.4 %
Total	70	100.0 %

2013 Business Survey – Village of Pinehurst

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

Q11. Have you visited Village's website (www.vopnc.org)	Number	Percent
Yes	32	41.6 %
No	42	54.5 %
Don't know/Unsure	3	3.9 %
Total	77	100.0 %

Q11. Have you visited the Village's website (www.vopnc.org) during the last 12 months? (without "don't know/unsure")

Q11. Have you visited Village's website (www.vopnc.org)	Number	Percent
Yes	32	43.2 %
No	42	56.8 %
Total	74	100.0 %

2013 Business Survey – Village of Pinehurst

Q12. 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:

(N=32)

	Very good	Good	Average	Poor	Don't know
Q12a. Easy to navigate	28.1%	31.3%	31.3%	6.3%	3.1%
Q12b. Informative content	34.4%	31.3%	31.3%	0.0%	3.1%
Q12c. Useful	31.3%	31.3%	34.4%	0.0%	3.1%

Q12. 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=32)

	Very good	Good	Average	Poor
Q12a. Easy to navigate	29.0%	32.3%	32.3%	6.5%
Q12b. Informative content	35.5%	32.3%	32.3%	0.0%
Q12c. Useful	32.3%	32.3%	35.5%	0.0%

2013 Business Survey – Village of Pinehurst

Q13. 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 of Pinehurst Website	Number	Percent
Very satisfied	9	28.1 %
Satisfied	15	46.9 %
Neutral	6	18.8 %
Dissatisfied	1	3.1 %
Don't know	1	3.1 %
Total	32	100.0 %

Q13. Overall, how satisfied would you say you were with the Village of Pinehurst Website? Would you say you were... (without "don't know")

Q13. How satisfied were you with Village of Pinehurst Website	Number	Percent
Very satisfied	9	29.0 %
Satisfied	15	48.4 %
Neutral	6	19.4 %
Dissatisfied	1	3.2 %
Total	31	100.0 %

2013 Business Survey – Village of Pinehurst

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

Q14. Best ways for Village to communicate with you to get important information to your business

	Number	Percent
Direct mail	24	31.2 %
Village website	15	19.5 %
Email	57	74.0 %
Merchant meetings	9	11.7 %
Social media	6	7.8 %
Personal calls and/or visits	16	20.8 %
Newsletters	23	29.9 %
Brochures	9	11.7 %
Other	2	2.6 %
None chosen	3	3.9 %
Total	164	

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	57	77.0 %
Direct mail	24	32.4 %
Newsletters	23	31.1 %
Personal calls and/or visits	16	21.6 %
Village website	15	20.3 %
Merchant meetings	9	12.2 %
Brochures	9	12.2 %
Social media	6	8.1 %
Other	2	2.7 %
Total	161	

Q14. Other

Q14 Other

EMAIL NEWSLETTERS

VISITS

2013 Business Survey – Village of Pinehurst

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	13.0%	29.9%	27.3%	10.4%	3.9%	15.6%
Q15b. Business signage regulations	14.3%	26.0%	29.9%	16.9%	2.6%	10.4%
Q15c. Historic District Guidelines	14.3%	26.0%	32.5%	6.5%	2.6%	18.2%

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	15.4%	35.4%	32.3%	12.3%	4.6%
Q15b. Business signage regulations	15.9%	29.0%	33.3%	18.8%	2.9%
Q15c. Historic District Guidelines	17.5%	31.7%	39.7%	7.9%	3.2%

2013 Business Survey – Village of Pinehurst

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

(N=77)

	About right amount	Too few	Too many	Don't know
Q16a. Restaurants	63.6%	31.2%	1.3%	3.9%
Q16b. Evening entertainment venues	45.5%	46.8%	1.3%	6.5%
Q16c. Cultural activities (live music, art festivals, etc.)	58.4%	36.4%	1.3%	3.9%
Q16d. Family friendly activities (movies in the park, etc.)	44.2%	48.1%	1.3%	6.5%
Q16e. Major special events (Holly Arts & Crafts Festival, parades, etc.)	76.6%	19.5%	1.3%	2.6%

Q16. CULTURE/ENTERTAINMENT. Using a scale of 1 to 3, where 3 means "About the Right Amount" 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)

	About right amount	Too few	Too many
Q16a. Restaurants	66.2%	32.4%	1.4%
Q16b. Evening entertainment venues	48.6%	50.0%	1.4%
Q16c. Cultural activities (live music, art festivals, etc.)	60.8%	37.8%	1.4%
Q16d. Family friendly activities (movies in the park, etc.)	47.2%	51.4%	1.4%
Q16e. Major special events (Holly Arts & Crafts Festival, parades, etc.)	78.7%	20.0%	1.3%

2013 Business Survey – Village of Pinehurst

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 are you with Village handling events that attract large crowds

	Number	Percent
Very satisfied	23	29.9 %
Satisfied	36	46.8 %
Neutral	14	18.2 %
Dissatisfied	1	1.3 %
Very dissatisfied	1	1.3 %
Don't know/Unsure	2	2.6 %
Total	77	100.0 %

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

Q17. How satisfied are you with Village handling events that attract large crowds

	Number	Percent
Very satisfied	23	30.7 %
Satisfied	36	48.0 %
Neutral	14	18.7 %
Dissatisfied	1	1.3 %
Very dissatisfied	1	1.3 %
Total	75	100.0 %

2013 Business Survey – Village of Pinehurst

Q18. DEMOGRAPHIC/OTHER INFORMATION. Please indicate the primary business category for your business (1st choice):

<u>Q18. Primary business category for your business</u>	<u>Number</u>	<u>Percent</u>
Retail	4	5.2 %
Restaurants & Food Services	9	11.7 %
Professional, Scientific, & Technical Services	7	9.1 %
Financial & Insurance	6	7.8 %
Real Estate & Rental Leasing	14	18.2 %
Health Care & Social Assistance	14	18.2 %
Arts, Entertainment, & Recreation	1	1.3 %
Other	21	27.3 %
Not provided	1	1.3 %
Total	77	100.0 %

Q18. Other

Q18 Other

BUILDER CONTRATORS
CHURCH
CHURCH
CONSULTANT MARKET
CONSULTING TRAVEL
EXTERMINATING SERVICE
GOLF DEVELOPMENT
LANDSCAPING
OFFICE SERVICES
PET GROOMING RETAIL
TRAVEL SALES MARKETING

2013 Business Survey – Village of Pinehurst

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	11	14.3 %
6-10 years	18	23.4 %
11-15 years	18	23.4 %
16-20 years	8	10.4 %
20+ years	20	26.0 %
<u>Not provided</u>	2	2.6 %
Total	77	100.0 %

Q19. How many years have you been in operation in the Village? (without "not provided")

Q19. How many years have you been in operation in Village	Number	Percent
0-5 years	11	14.7 %
6-10 years	18	24.0 %
11-15 years	18	24.0 %
16-20 years	8	10.7 %
20+ years	20	26.7 %
Total	75	100.0 %

2013 Business Survey – Village of Pinehurst

Q20. Please answer the following questions:

(N=77)

	Yes	No	Not provided
Q20a. Are you a member of Pinehurst Business Guild	16.9%	81.8%	1.3%
Q20b. Are you a member of Moore County Chamber of Commerce	40.3%	59.7%	0.0%
Q20c. Is your business located in Village Center	19.5%	77.9%	2.6%

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

(N=77)

	Yes	No
Q20a. Are you a member of Pinehurst Business Guild	17.1%	82.9%
Q20b. Are you a member of Moore County Chamber of Commerce	40.3%	59.7%
Q20c. Is your business located in Village Center	20.0%	80.0%

2013 Business Survey – Village of Pinehurst

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	Not provided
Q21a. Overall image of Village	28.6%	24.7%	33.8%	3.9%	5.2%	3.9%
Q21b. Low crime rate	37.7%	26.0%	24.7%	2.6%	5.2%	3.9%
Q21c. Availability of trained employees	22.1%	23.4%	19.5%	20.8%	10.4%	3.9%
Q21d. Level of taxation	29.9%	16.9%	31.2%	9.1%	9.1%	3.9%
Q21e. Affordable rent	29.9%	15.6%	22.1%	11.7%	16.9%	3.9%
Q21f. Attitude of local government towards businesses	32.5%	18.2%	26.0%	3.9%	11.7%	7.8%

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 "not provided")

(N=77)

	Extremely important	Very important	Important	Less important	Not important
Q21a. Overall image of Village	29.7%	25.7%	35.1%	4.1%	5.4%
Q21b. Low crime rate	39.2%	27.0%	25.7%	2.7%	5.4%
Q21c. Availability of trained employees	23.0%	24.3%	20.3%	21.6%	10.8%
Q21d. Level of taxation	31.1%	17.6%	32.4%	9.5%	9.5%
Q21e. Affordable rent	31.1%	16.2%	23.0%	12.2%	17.6%
Q21f. Attitude of local government towards businesses	35.2%	19.7%	28.2%	4.2%	12.7%



HISTORY, CHARM, AND SOUTHERN HOSPITALITY

October 2013

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,

Natalie E. Dean
Assistant Village Manager

ADMINISTRATION

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



2013 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:

_____ (01) Significantly higher than your expectations _____ (04) Below your expectations
 _____ (02) Higher than your expectations _____ (05) Significantly below your expectations
 _____ (03) Meets your expectations _____ (09) 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

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...

- | | |
|---------------------------|------------------------------|
| _____ (01) Very satisfied | _____ (04) Dissatisfied |
| _____ (02) Satisfied | _____ (05) Very dissatisfied |
| _____ (03) Neutral | _____ (09) 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)

- | | |
|------------------------------|---|
| _____ (01) Direct mail | _____ (06) Personal calls and/or visits |
| _____ (02) Village website | _____ (07) Newsletters |
| _____ (03) Email | _____ (08) Brochures |
| _____ (04) Merchant meetings | _____ (09) Other _____ |
| _____ (05) 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 "About the Right Amount" and 1 means "Too Many", please indicate if you feel there are an appropriate amount of the following in the Village Center:

		About the Right Amount	Too Few	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.)?

- _____ (01) Very satisfied
- _____ (02) Satisfied
- _____ (03) Neutral

- _____ (04) Dissatisfied
- _____ (05) Very dissatisfied
- _____ (09) Don't know/Unsure

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

- _____ (01) Retail
- _____ (02) Restaurants and Food Services
- _____ (03) Inn
- _____ (04) Professional, Scientific, and Technical Services

- _____ (05) Financial and Insurance
- _____ (06) Real Estate and Rental Leasing
- _____ (07) Health Care and Social Assistance
- _____ (08) Arts, Entertainment, and Recreation
- _____ (09) Other

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

- _____ (01) 0-5 years
- _____ (02) 6-10 years
- _____ (03) 11-15 years

- _____ (04) 16-20 years
- _____ (05) 20+ years

20. Please answer the following questions:

		Yes	No
A.	Are you a member of the Pinehurst Business Guild?	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