

2014 Business Survey

Findings Report



HISTORY, CHARM, AND SOUTHERN HOSPITALITY_____

conducted for
The Village of
Pinehurst, North Carolina

by

ETC Institute
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October 2014



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, 79 completed the survey (49 by mail and 30 by phone). 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:

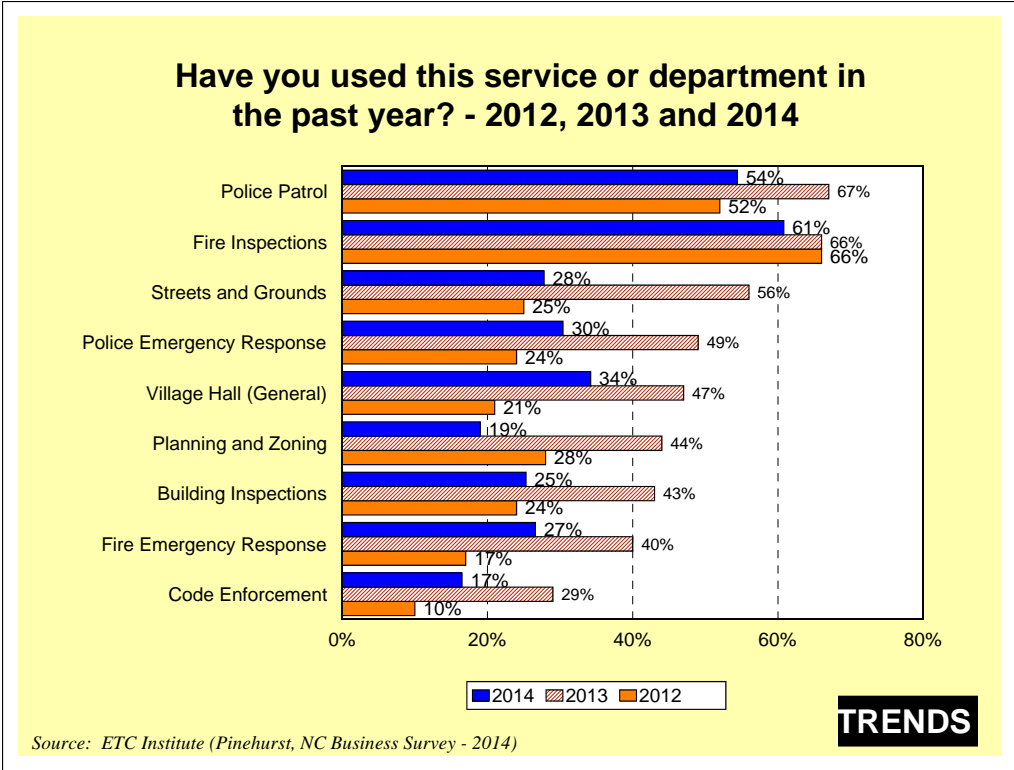
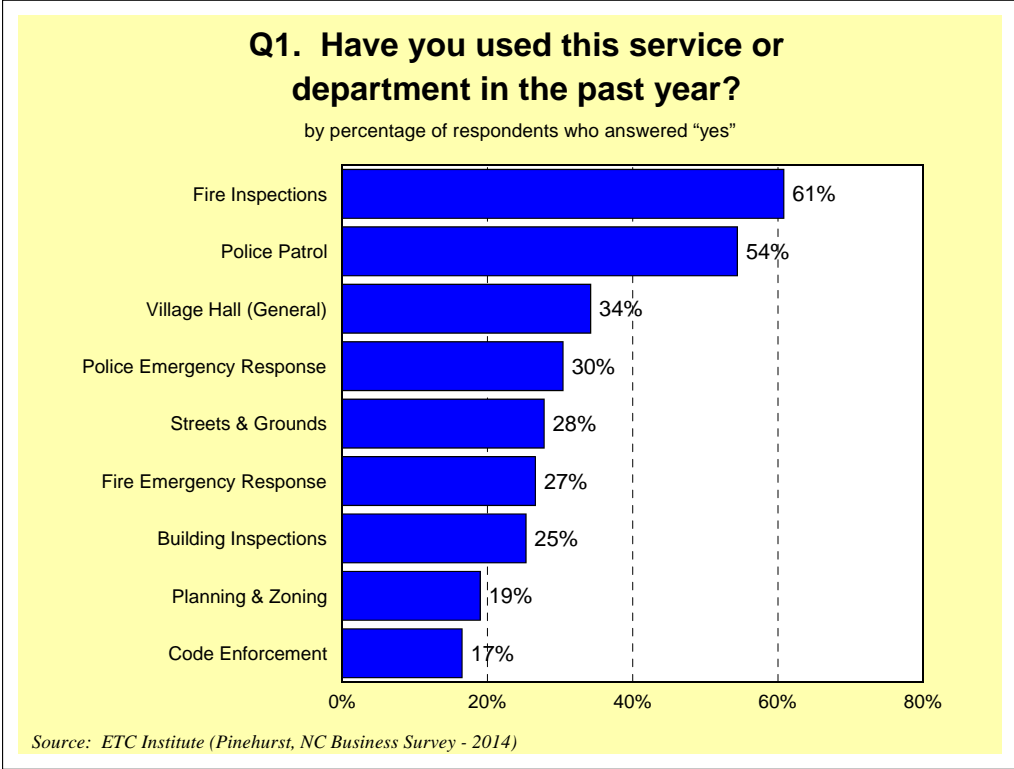
- a summary of the methodology for administering the survey and major findings
- charts and graphs for each question on the survey
- importance-satisfaction analysis
- tables that show the results for each question on the survey
- a copy of the survey instrument.

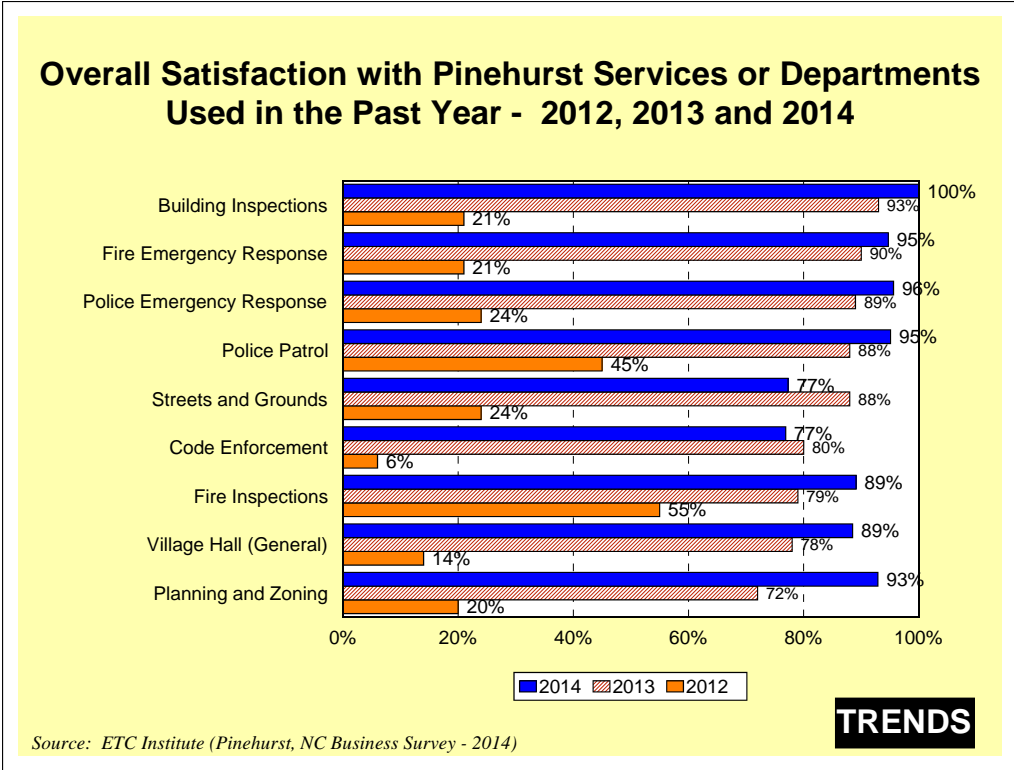
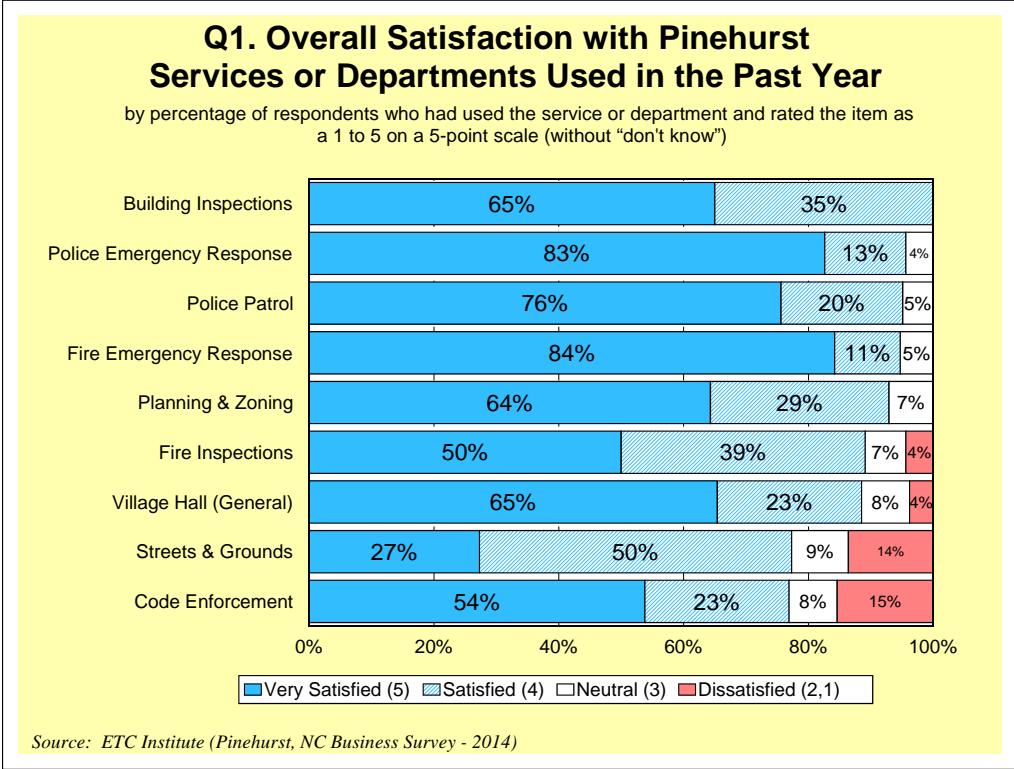
Major Findings

- **Business satisfaction with Village services.** The greatest number of businesses had experience with fire inspections (61%) and police patrol (54%) over the past year, and satisfaction was highest in building inspections (100%) and police emergency responses (96%).
- **Services that businesses as the most important.** Based on the sum of the top three choices, areas that businesses indicated as the most important were: (1) police patrol (58%), (2) police emergency response (51%), and (3) fire emergency response (44%).
- **28% felt the Village was higher than their expectations with the overall quality of services provided, compared to 21% in 2013 and 2012.**
- **Satisfaction with Various Village Services.** Most (97%) of the businesses surveyed *who had an opinion* indicated that they were satisfied with the cleanliness of streets; 90% were satisfied with the landscape and maintenance in right of ways and public areas and 84% were satisfied with the Village creating & promoting special events (84%). Businesses were least satisfied with the availability of employee and customer parking around their business (51%).
- **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; 92% were satisfied with the overall quality of life, 89% were satisfied with the overall feeling of safety in the Village in the evening and 89% were satisfied with the overall image of Village.
- **42% would be very likely (up from 32% in 2013), 27% would be likely, and 18% would be somewhat likely to recommend the Village as a business location to family and friends.**
- **33% rated the overall business atmosphere in the Village as better than two years ago (down from 39% in 2012).**
- **34% rated as very good and 46% rated as good, Village customer service.**
- **Level of Agreement with Statements About the Village.** Ninety-five (95%) 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 (up from 87% in 2013), 90% were satisfied with the competence and professionalism of Village staff (up from 82% in 2012), and 88% were satisfied with the responsiveness to their needs (up from 78% in 2012).
- **Satisfaction with Village Communications with Businesses.** Sixty-two percent (62%) of the businesses surveyed who had an opinion were satisfied, 21% were neutral and 4% were dissatisfied with communications. Thirteen percent (13%) did not have an opinion.

- **Email (70%) and direct mail (47%) were indicated as the best way to communicate important information to businesses.**
- **77% were satisfied with the website, compared to 75% in 2013 and 38% in 2012.**
- **Community Development (Codes and Ordinances)** Sixty-four percent (64%) of the businesses *who had an opinion* were satisfied (rating of 4 or 5 on a 5-point scale) with the zoning ordinances (up from 50% in 2013), 59% were satisfied with the historic district guidelines, and 54% were satisfied with business signage and regulations.
- **Amount of Various Cultural and Entertainment Opportunities** Forty-eight percent (48%) of the businesses surveyed rated as “the right amount” major special events, 47% rated as “the right amount” restaurants in the Village, but 46% rated as “too few”, family friendly activities.
- **35% were very satisfied (up from 30% in 2013) and 43% were satisfied with how the Village handles events that attract large crowds to the Village.**
- **Almost half, 49% of the 79 businesses who responded have been in operating in the village 16 years or more.**
- **Importance of Various Reasons to Locate the Business in the Village** Seventy-four percent (74%) indicated that attitude of local government towards businesses was the most important, 74% said the image of the Village was second, and 70% said low crime rate as the most important to the location of their business in the Village.

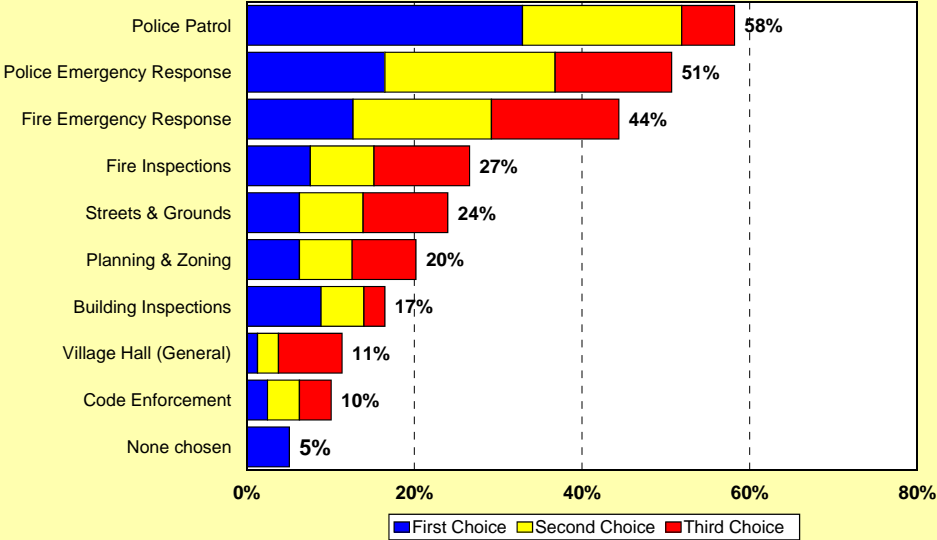
Section 1:
Charts and Graphs





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

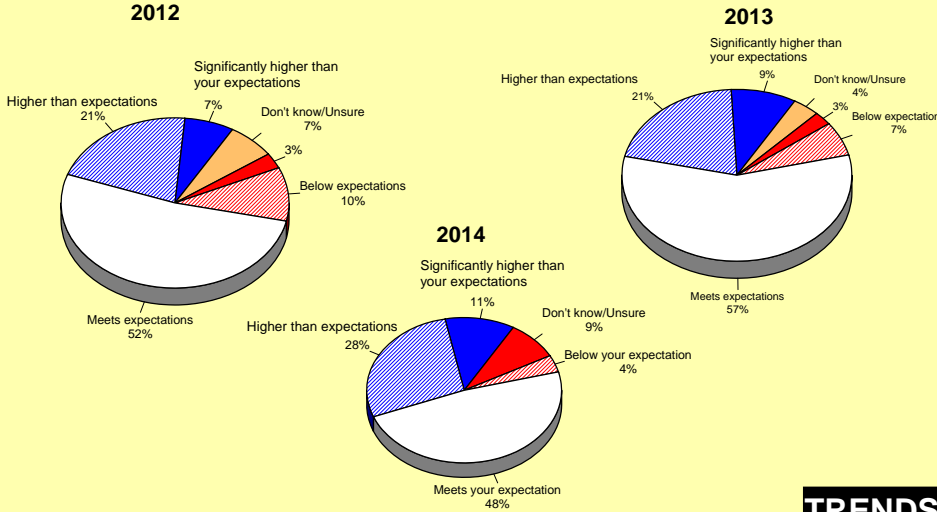
by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute (Pinehurst, NC Business Survey - 2014)

Q3. Businesses satisfaction with the overall quality of services provided to your business by the Village of Pinehurst?

by percentage of respondents

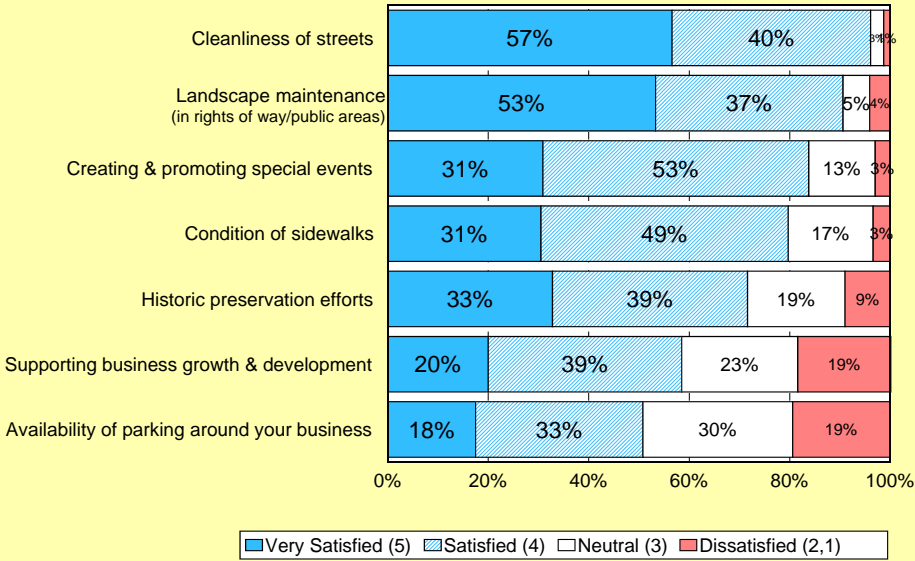


Source: ETC Institute (Pinehurst, NC Business Survey - 2014)

TRENDS

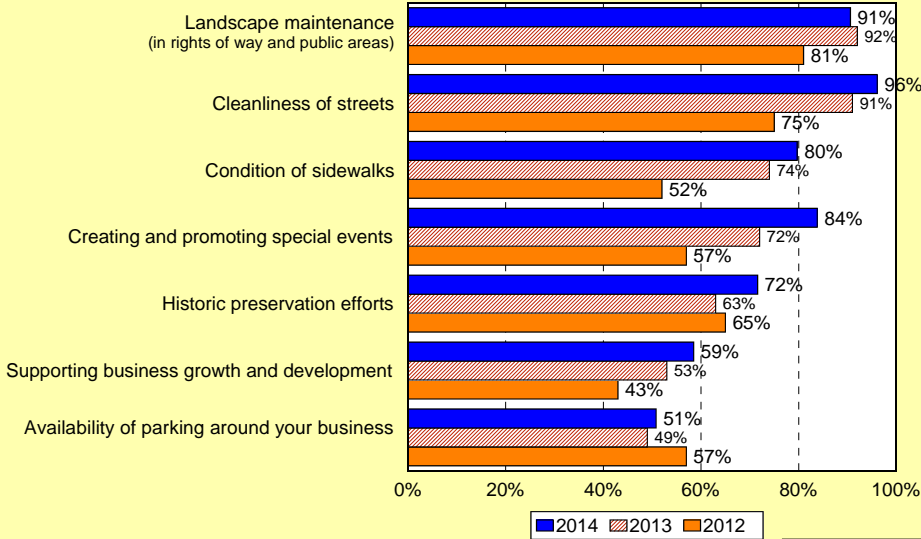
Q4. Level of Satisfaction with the Village in Various Areas

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



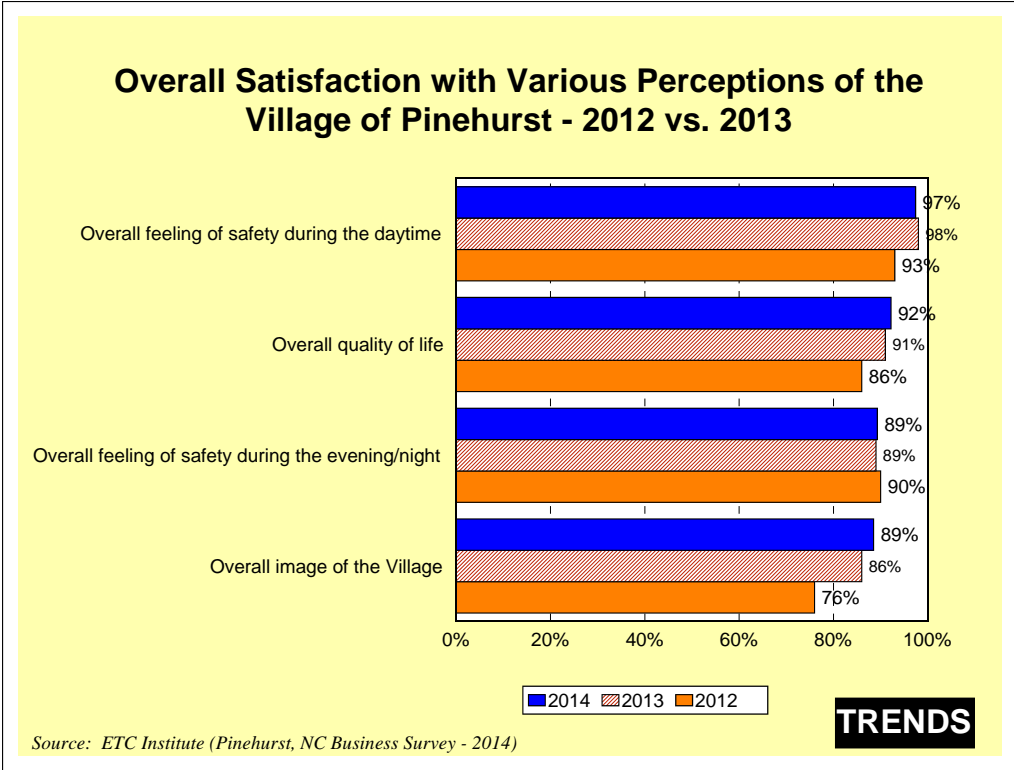
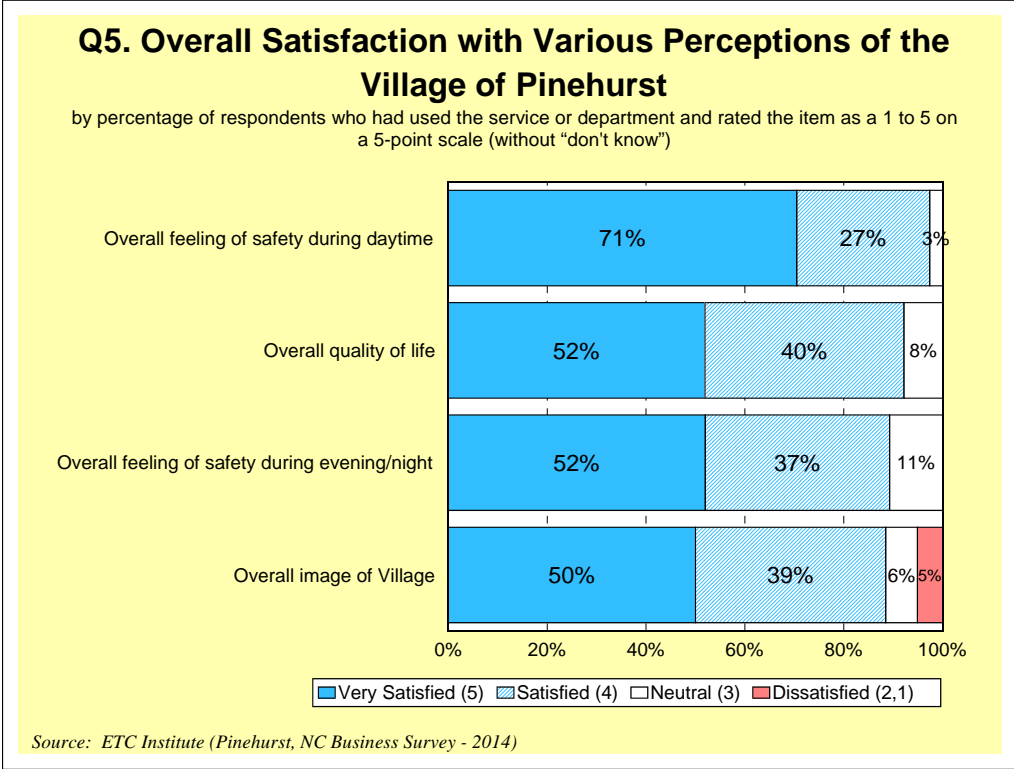
Source: ETC Institute (Pinehurst, NC Business Survey - 2014)

Level of Satisfaction with the Village in Various Areas 2012, 2013 and 2014



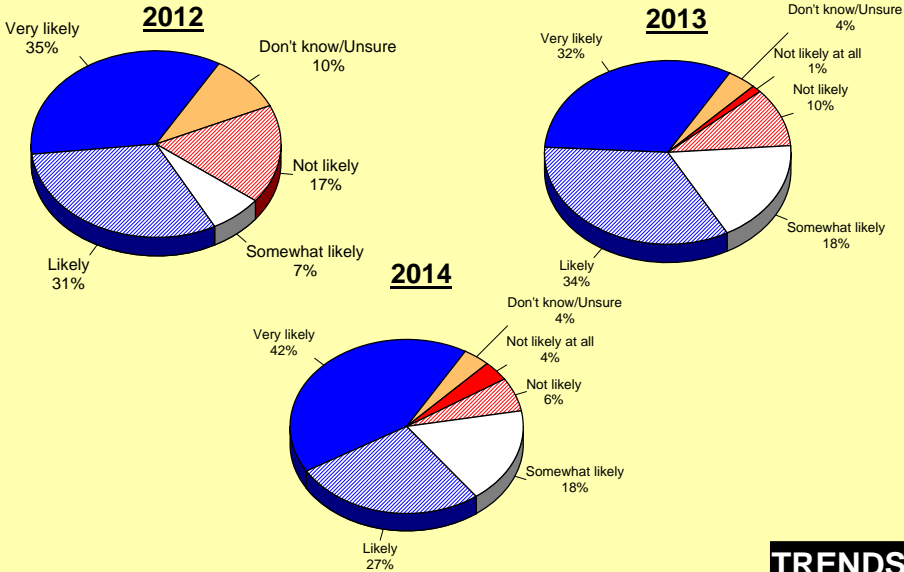
Source: ETC Institute (Pinehurst, NC Business Survey - 2014)

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

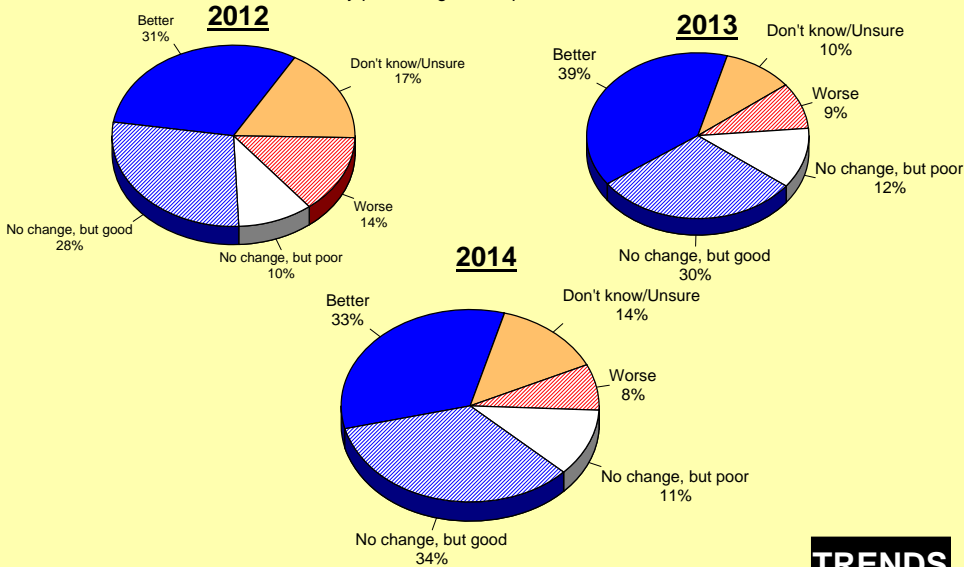


Source: ETC Institute (Pinehurst, NC Business Survey - 2014)

TRENDS

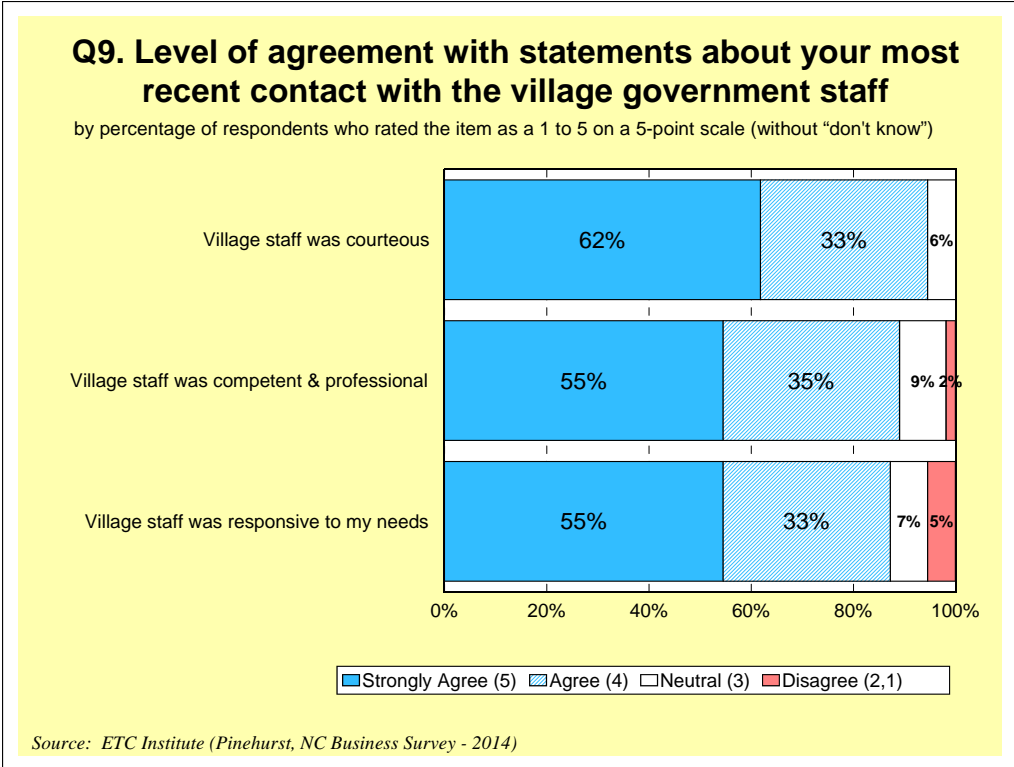
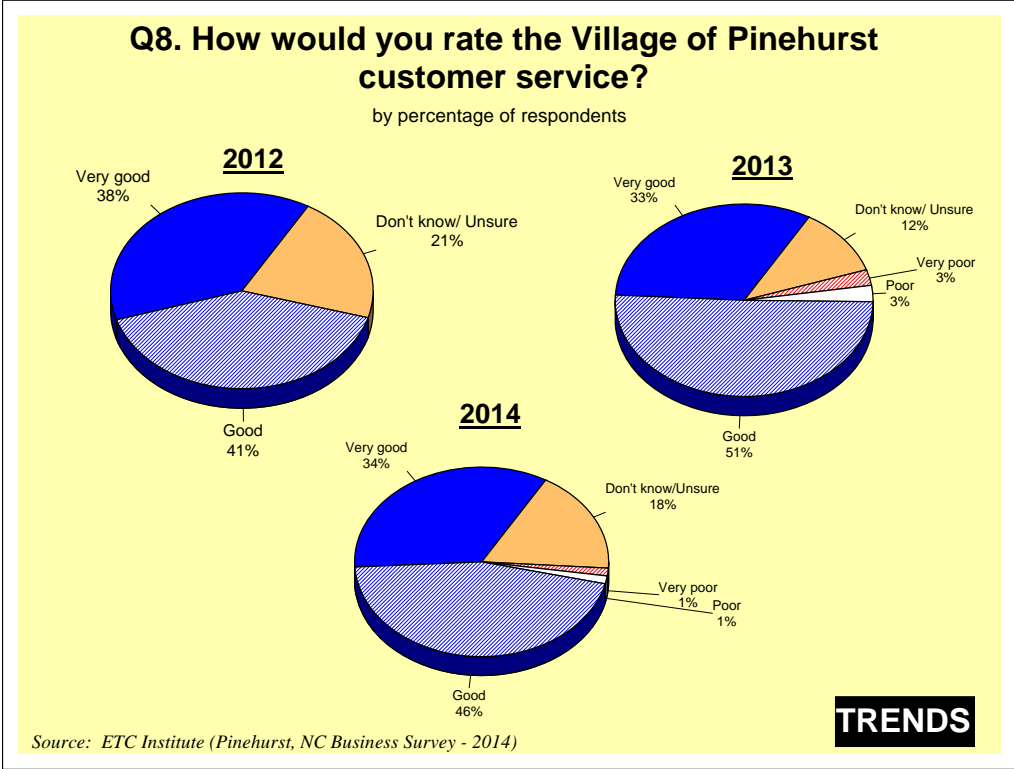
Q7. How would you rate the overall business atmosphere in the Village of Pinehurst today, compared to two years ago?

by percentage of respondents

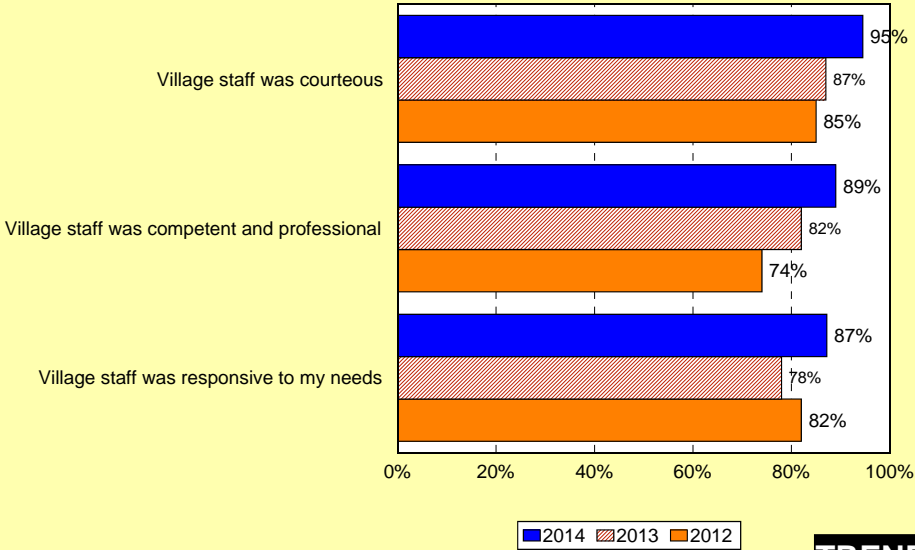


Source: ETC Institute (Pinehurst, NC Business Survey - 2014)

TRENDS



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

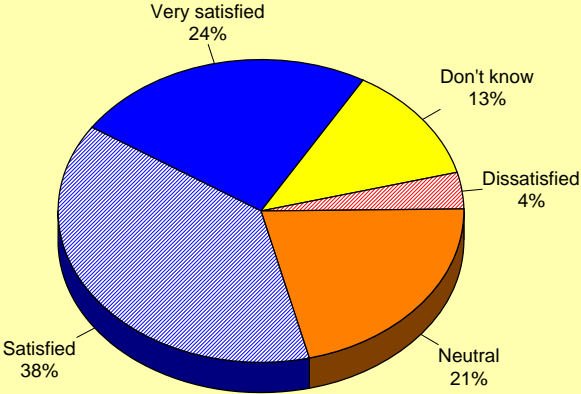


Source: ETC Institute (Pinehurst, NC Business Survey - 2014)

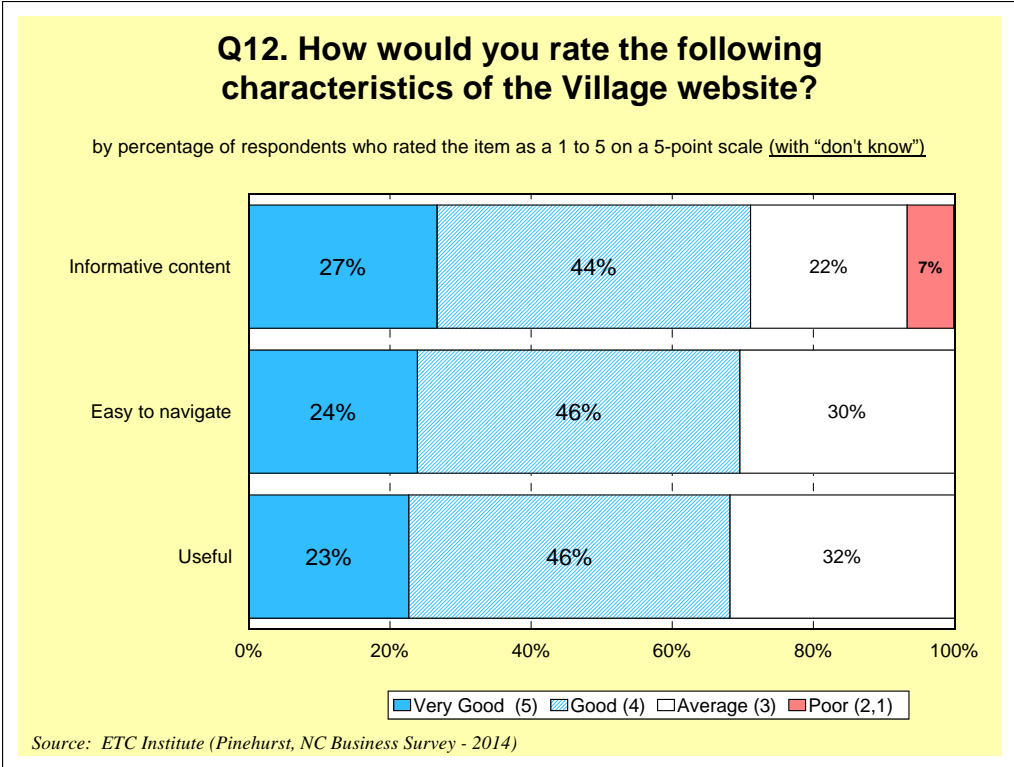
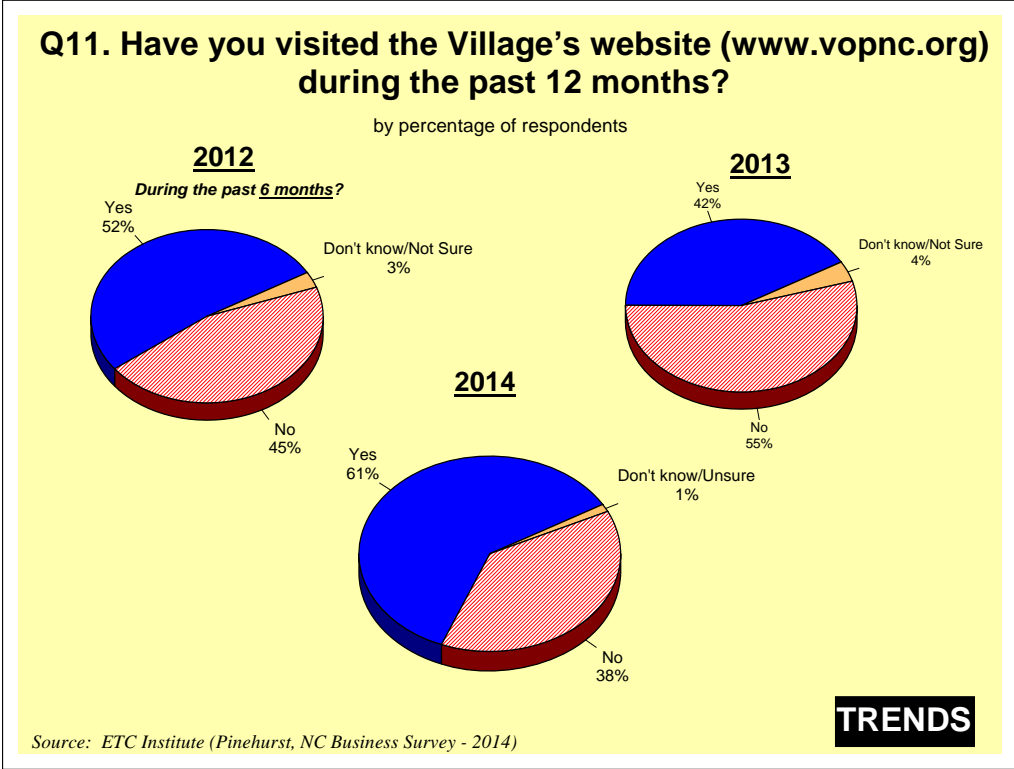
TRENDS

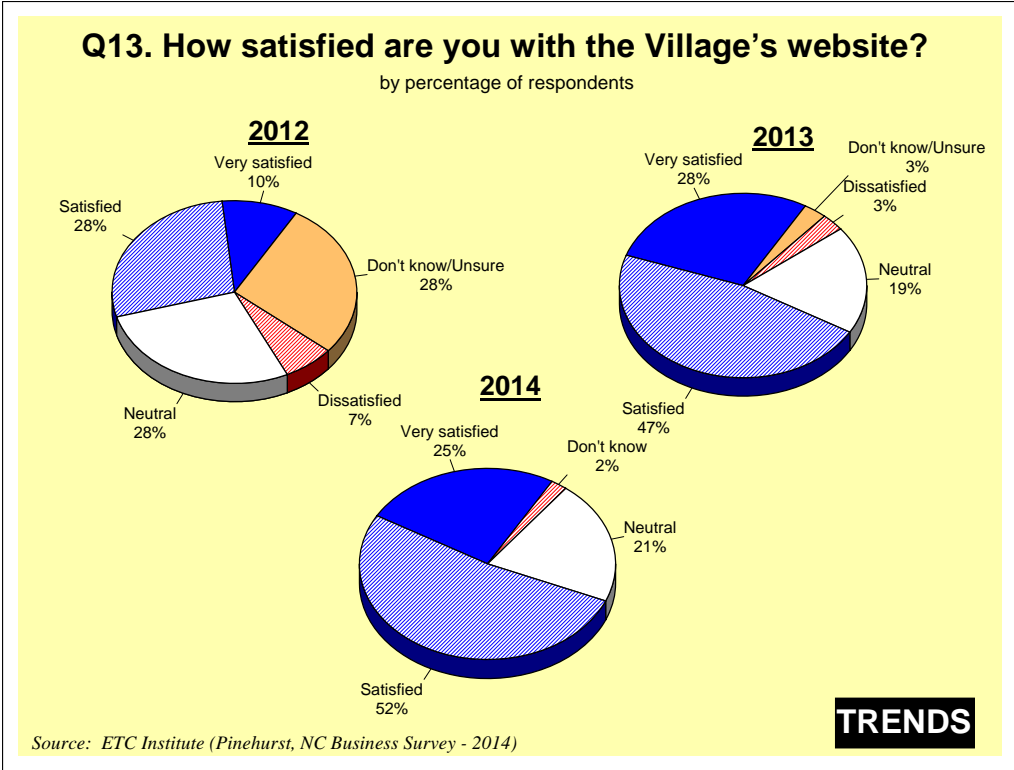
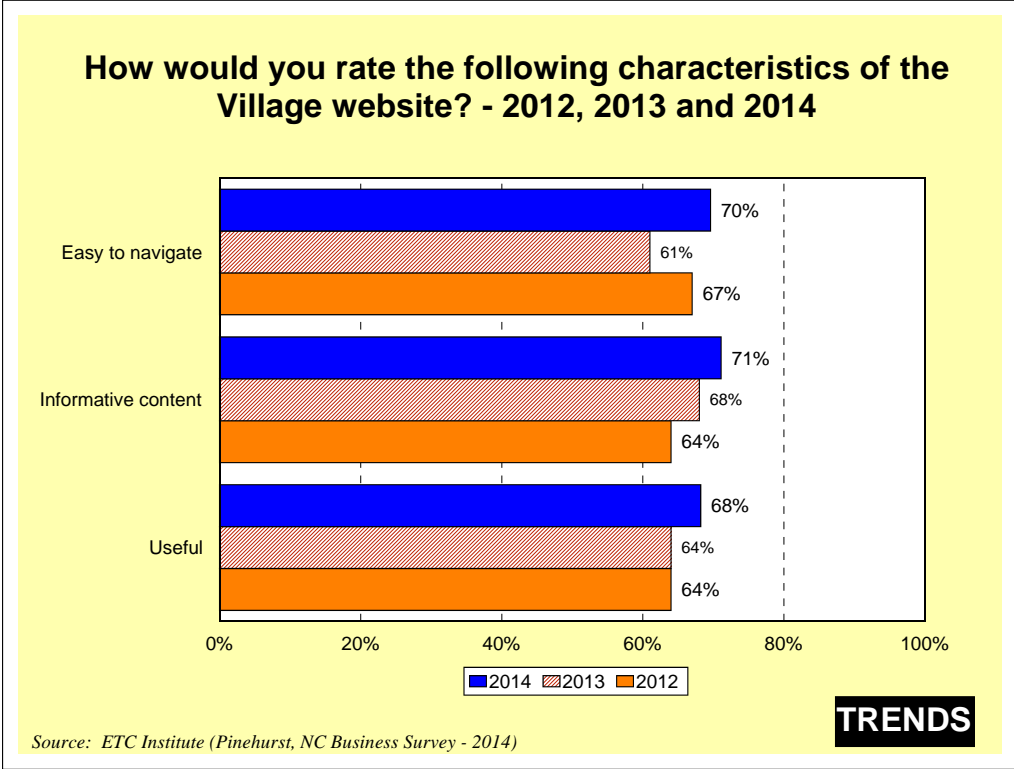
Q10. How satisfied are you with the job the Village of Pinehurst does communicating with business owners?

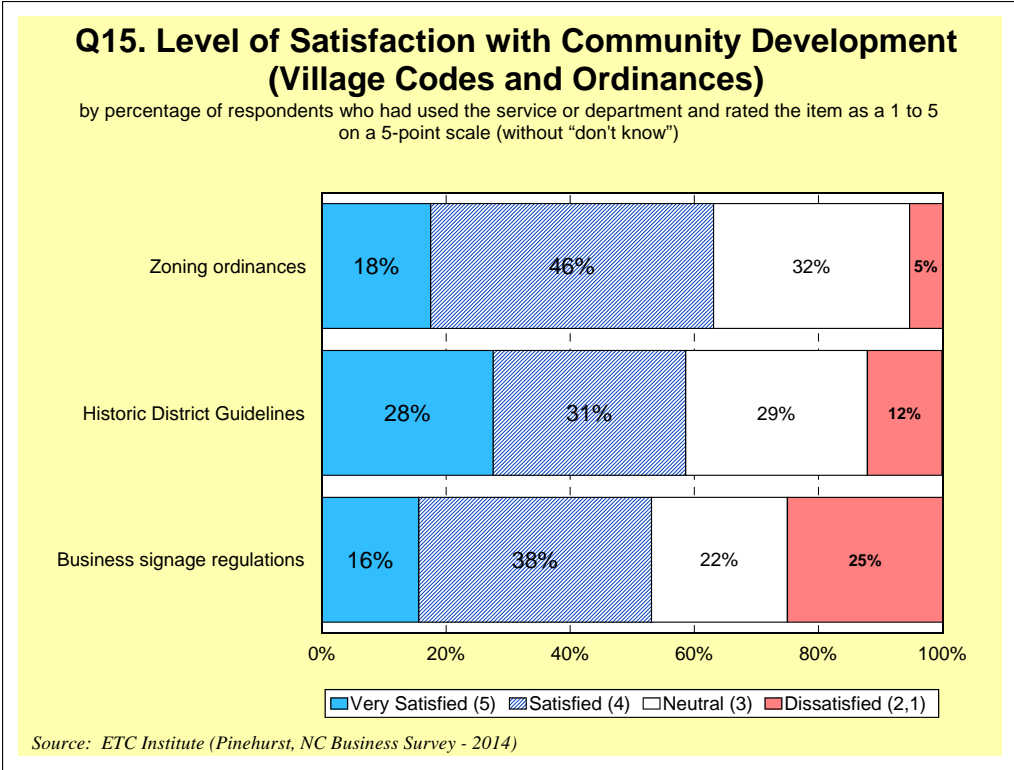
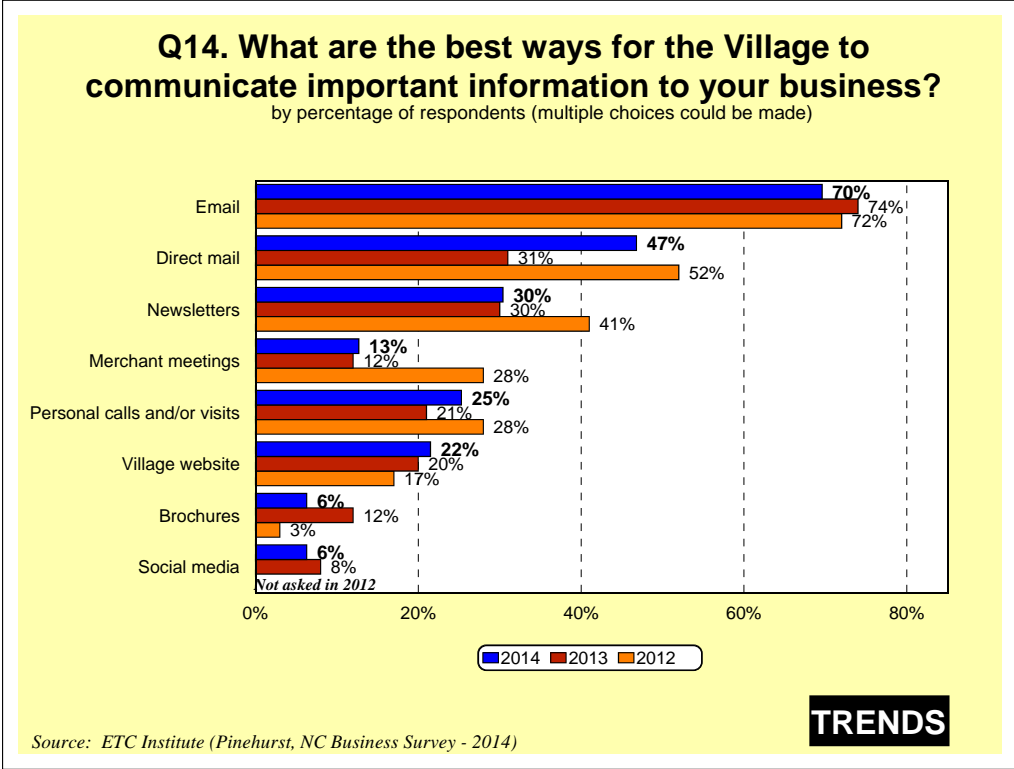
by percentage of respondents

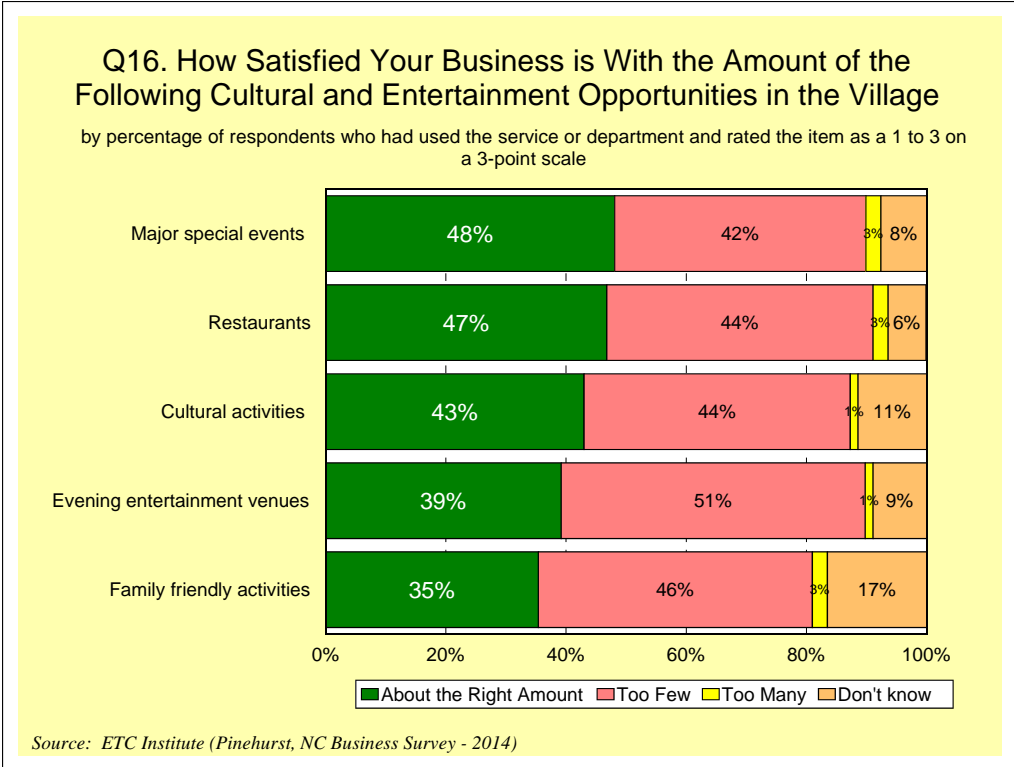
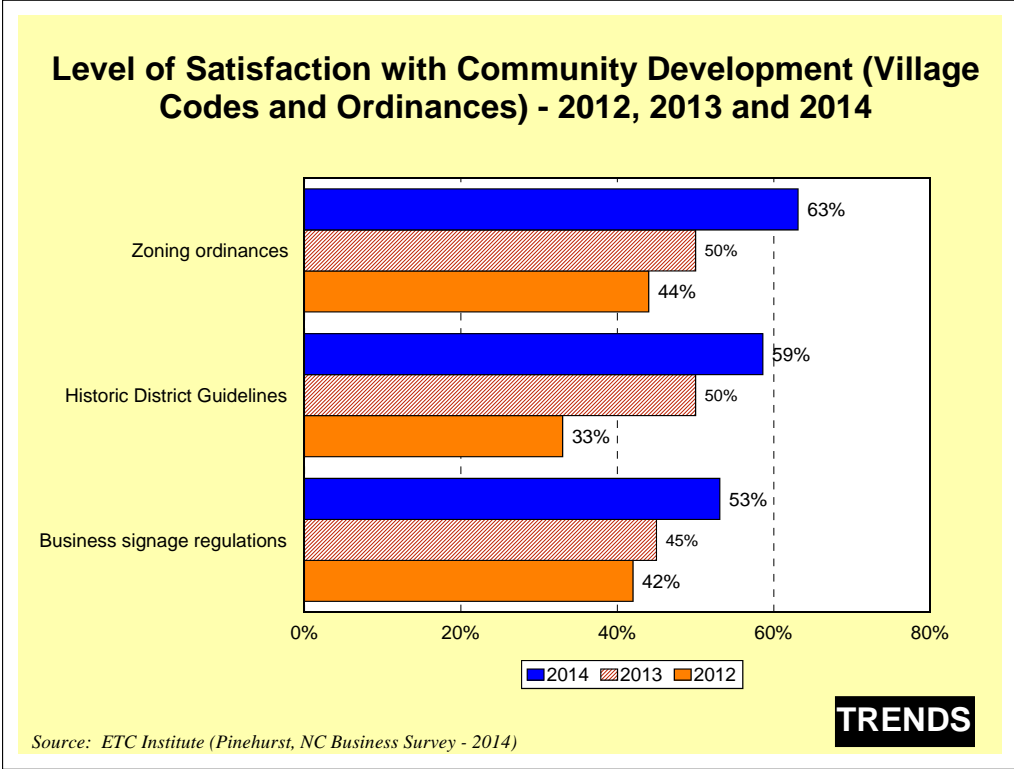


Source: ETC Institute (Pinehurst, NC Business Survey - 2014)



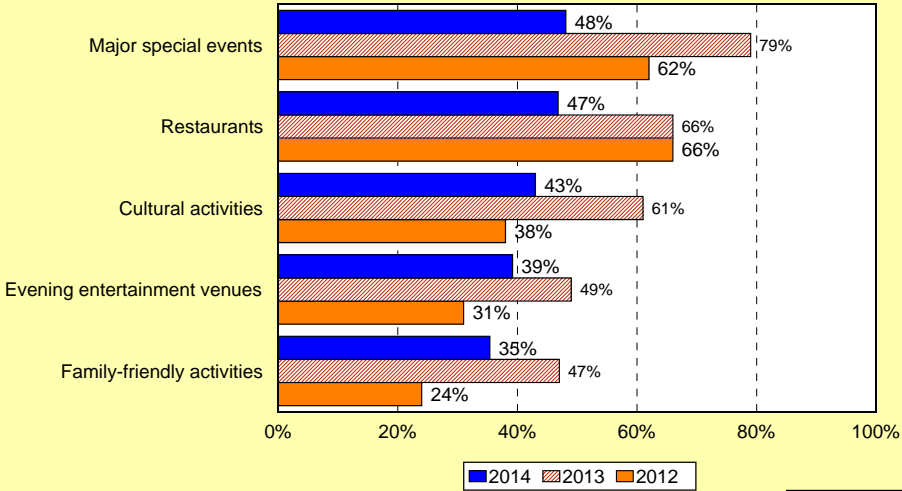






How Satisfied your Business is with the Amount of the Following Cultural and Entertainment Opportunities in the Village - 2012, 2013 and 2014

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

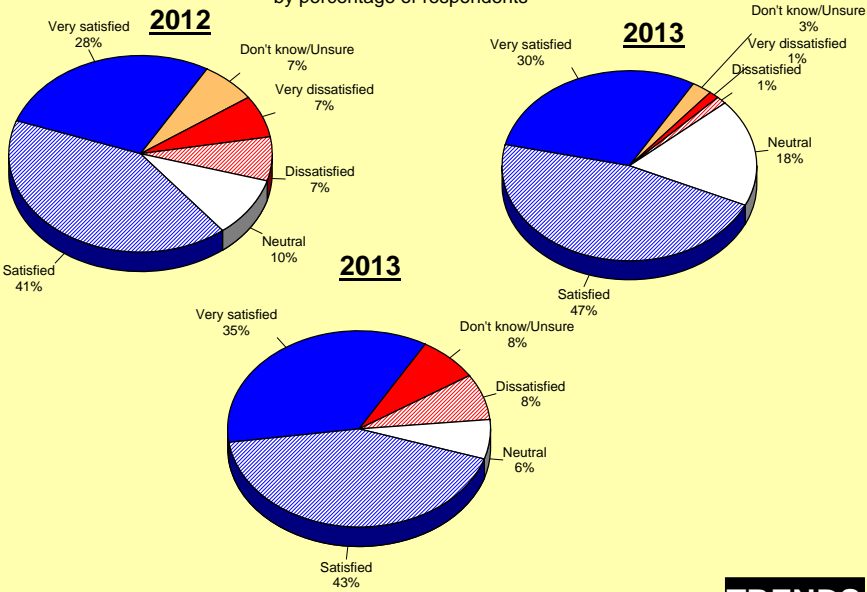


Source: ETC Institute (Pinehurst, NC Business Survey - 2013)

TRENDS

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

by percentage of respondents

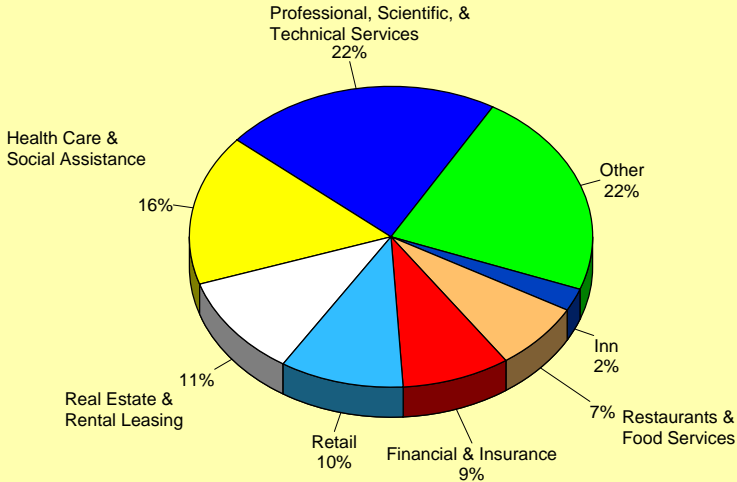


Source: ETC Institute (Pinehurst, NC Business Survey - 2014)

TRENDS

Q18. Primary Business Category for Your Business

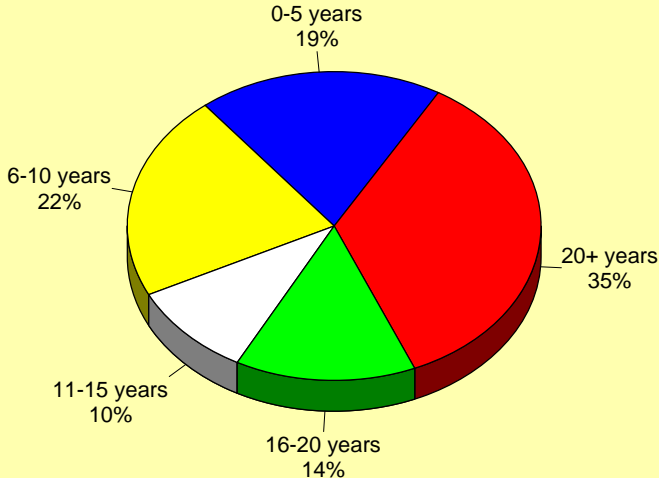
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2014)

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

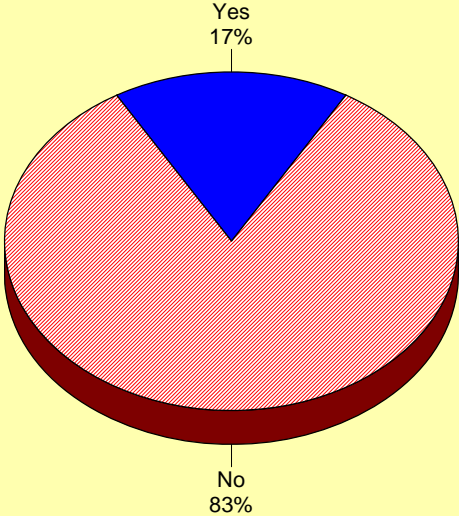
by percentage of respondents



Source: ETC Institute (Pinehurst, NC Business Survey - 2014)

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

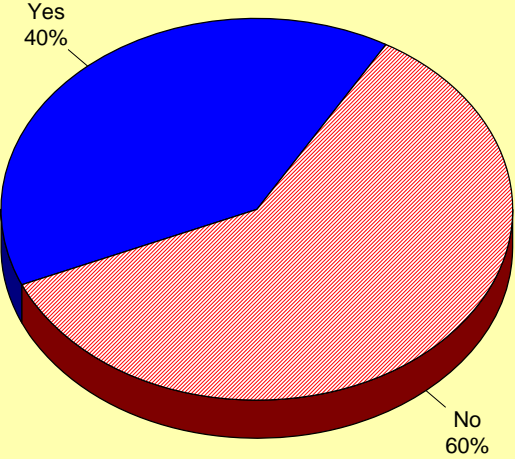
by percentage of respondents



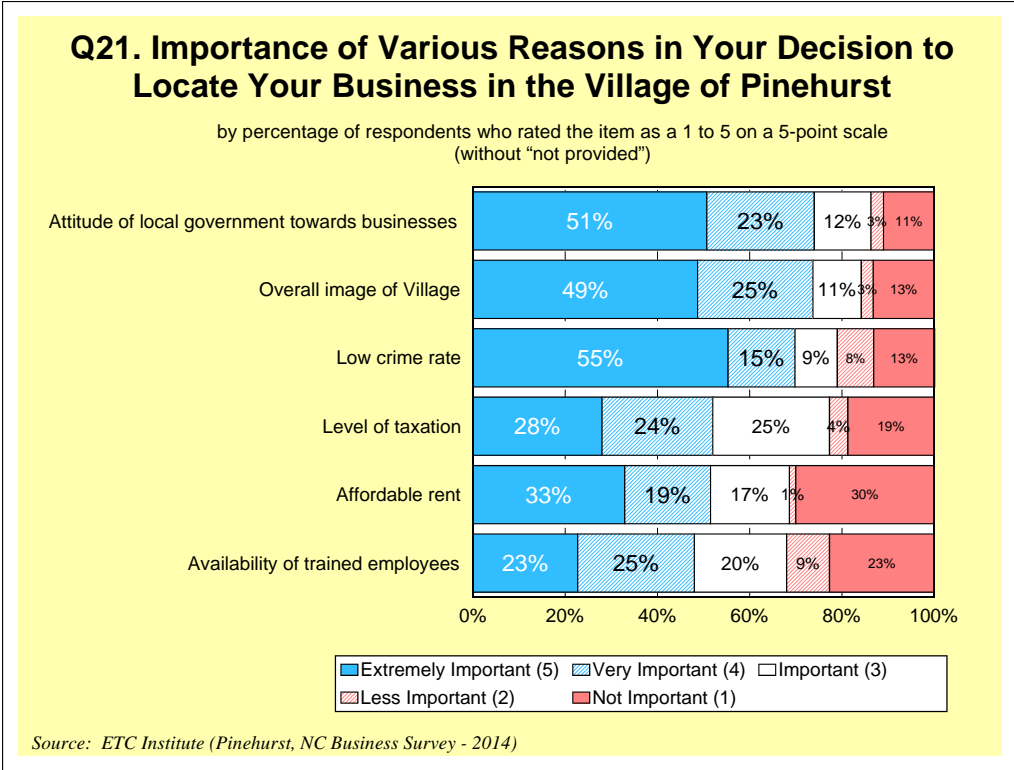
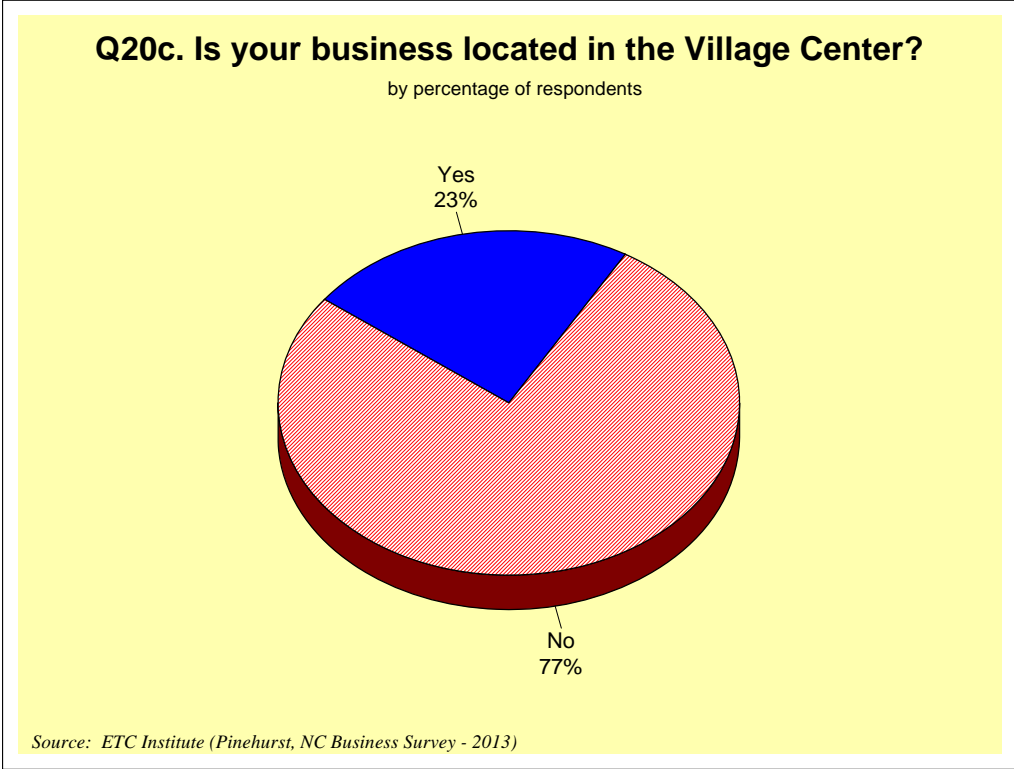
Source: ETC Institute (Pinehurst, NC Business Survey - 2014)

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

by percentage of respondents



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 were the most important, fifty-eight percent (58%) ranked "Police Patrol" as one of the most important services.

With regard to satisfaction, “Police Patrol” was ranked second overall with 95% 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, 95% was multiplied by 58% (1-0.55). This calculation yielded an I-S rating of **0.028518**, 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% indicates 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
 - ❖ This was achieved this year by **Building inspections**
- if none (0%) of the Businesses selected the service as one of the three most important areas.

Interpreting the Ratings

Ratings that are greater than or equal to 0.20 identify areas that should receive significantly more emphasis over the next two years. Ratings from .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>						
Streets & Grounds	24%	5	77%	8	0.0547	1
Fire Inspections	27%	4	89%	7	0.0290	2
Police Patrol	58%	1	95%	3	0.0285	3
Fire Emergency Response	44%	3	95%	4	0.0235	4
Code Enforcement	10%	9	77%	9	0.0233	5
Police Emergency Response	51%	2	96%	2	0.0223	6
Planning & Zoning	20%	6	93%	5	0.0144	7
Village Hall (General)	11%	8	89%	6	0.0131	8
Building Inspections	17%	7	100%	1	0.0000	9

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

Most Important %:

The "Most Important" percentage represents the sum of the first, second, and third most important responses for each item. Respondents were asked to identify the items they thought should receive the most emphasis over the next two years.

Satisfaction %:

The "Satisfaction" percentage represents the sum of the ratings "4" and "5" excluding 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 Businesses in the Village of Pinehurst, NC

Overview

Two of the most important criteria for decision making are (1) to target resources toward services of the highest importance to citizens; and (2) to target resources toward those services where citizens are the least satisfied.

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

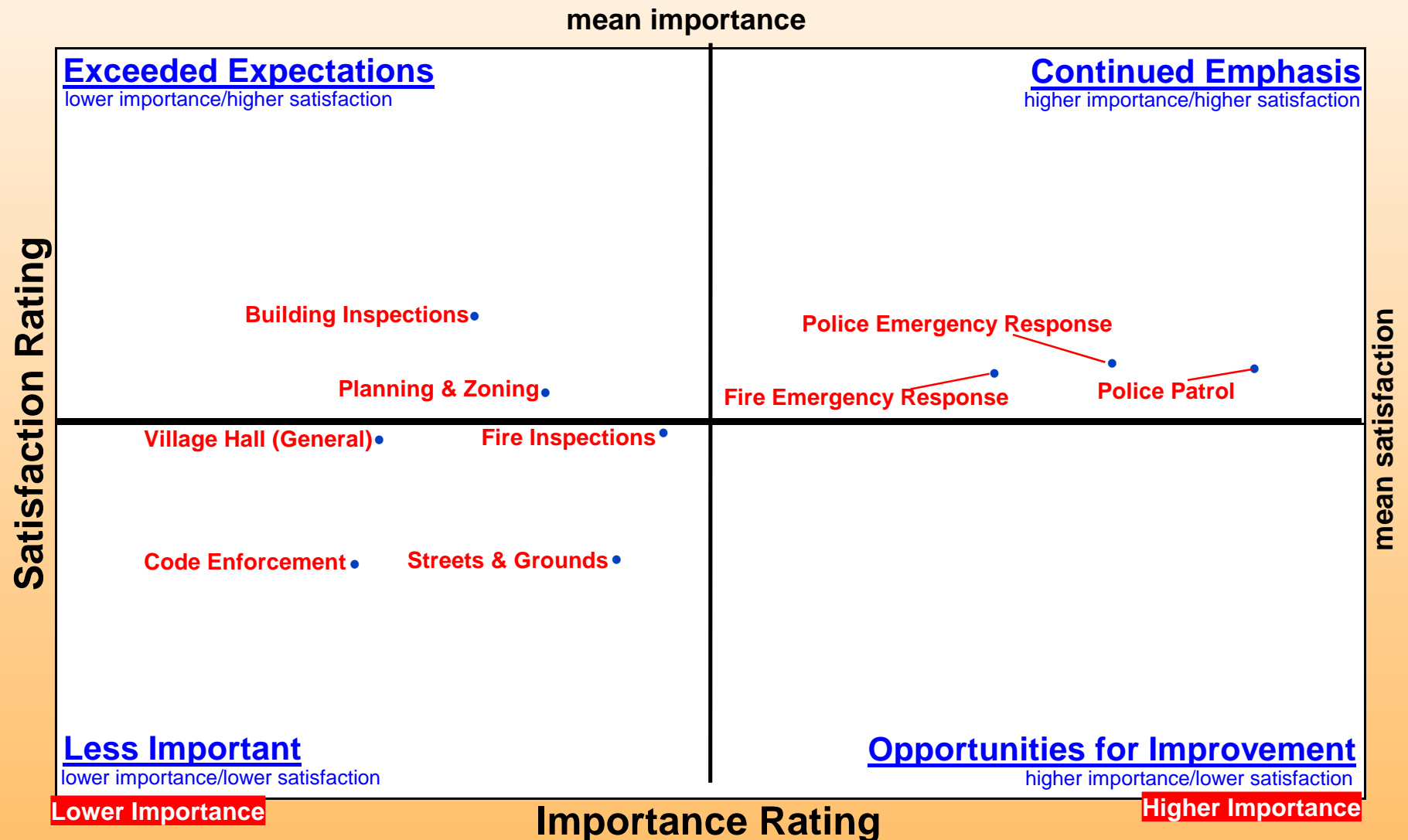
- **Less Important (below average importance and below average satisfaction).** This area shows where the Village is not performing well relative to the Park District’s performance in other areas; however, this area is generally considered to be less important to residents. This area does not significantly 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.

A Matrix showing the results for the Village are provided on the following pages.

2014 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

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

(N=79)

	Yes	No
Q1a. Building Inspections	25.3%	74.7%
Q1b. Fire Inspections	60.8%	39.2%
Q1c. Planning & Zoning	19.0%	81.0%
Q1d. Code Enforcement	16.5%	83.5%
Q1e. Police Patrol	54.4%	45.6%
Q1f. Police Emergency Response	30.4%	69.6%
Q1g. Fire Emergency Response	26.6%	73.4%
Q1h. Village Hall (General)	34.2%	65.8%
Q1i. Streets & Grounds	27.8%	72.2%

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=69)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q1a. Building Inspections	65.0%	35.0%	0.0%	0.0%	0.0%	0.0%
Q1b. Fire Inspections	47.9%	37.5%	6.3%	2.1%	2.1%	4.2%
Q1c. Planning & Zoning	60.0%	26.7%	6.7%	0.0%	0.0%	6.7%
Q1d. Code Enforcement	53.8%	23.1%	7.7%	7.7%	7.7%	0.0%
Q1e. Police Patrol	72.1%	18.6%	4.7%	0.0%	0.0%	4.7%
Q1f. Police Emergency Response	79.2%	12.5%	4.2%	0.0%	0.0%	4.2%
Q1g. Fire Emergency Response	76.2%	9.5%	4.8%	0.0%	0.0%	9.5%
Q1h. Village Hall (General)	63.0%	22.2%	7.4%	3.7%	0.0%	3.7%
Q1i. Streets & Grounds	27.3%	50.0%	9.1%	9.1%	4.5%	0.0%

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=69)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q1a. Building Inspections	65.0%	35.0%	0.0%	0.0%	0.0%
Q1b. Fire Inspections	50.0%	39.1%	6.5%	2.2%	2.2%
Q1c. Planning & Zoning	64.3%	28.6%	7.1%	0.0%	0.0%
Q1d. Code Enforcement	53.8%	23.1%	7.7%	7.7%	7.7%
Q1e. Police Patrol	75.6%	19.5%	4.9%	0.0%	0.0%
Q1f. Police Emergency Response	82.6%	13.0%	4.3%	0.0%	0.0%
Q1g. Fire Emergency Response	84.2%	10.5%	5.3%	0.0%	0.0%
Q1h. Village Hall (General)	65.4%	23.1%	7.7%	3.8%	0.0%
Q1i. Streets & Grounds	27.3%	50.0%	9.1%	9.1%	4.5%

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

Q2. Top choice	Number	Percent
Building Inspections	7	8.9 %
Fire Inspections	6	7.6 %
Planning & Zoning	5	6.3 %
Code Enforcement	2	2.5 %
Police Patrol	26	32.9 %
Police Emergency Response	13	16.5 %
Fire Emergency Response	10	12.7 %
Village Hall (General)	1	1.3 %
Streets & Grounds	5	6.3 %
None chosen	4	5.1 %
Total	79	100.0 %

Missing Cases = 0

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

Q2. 2nd choice	Number	Percent
Building Inspections	4	5.1 %
Fire Inspections	6	7.6 %
Planning & Zoning	5	6.3 %
Code Enforcement	3	3.8 %
Police Patrol	15	19.0 %
Police Emergency Response	16	20.3 %
Fire Emergency Response	13	16.5 %
Village Hall (General)	2	2.5 %
Streets & Grounds	6	7.6 %
None chosen	9	11.4 %
Total	79	100.0 %

Missing Cases = 0

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

Q2. 3rd choice	Number	Percent
Building Inspections	2	2.5 %
Fire Inspections	9	11.4 %
Planning & Zoning	6	7.6 %
Code Enforcement	3	3.8 %
Police Patrol	5	6.3 %
Police Emergency Response	11	13.9 %
Fire Emergency Response	12	15.2 %
Village Hall (General)	6	7.6 %
Streets & Grounds	8	10.1 %
None chosen	17	21.5 %
Total	79	100.0 %

Missing Cases = 0

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

Q2. Top choice	Number	Percent
Building Inspections	13	16.5 %
Fire Inspections	21	26.6 %
Planning & Zoning	16	20.3 %
Code Enforcement	8	10.1 %
Police Patrol	46	58.2 %
Police Emergency Response	40	50.6 %
Fire Emergency Response	35	44.3 %
Village Hall (General)	9	11.4 %
Streets & Grounds	19	24.1 %
None chosen	4	5.1 %
Total	211	

Number of Cases = 79

Number of Responses = 211

Average Number Of Responses Per Case = 2.7

Number Of Cases With At Least One Response = 79

Response Percent = 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:

Q3. How satisfied are you with overall quality of services provided to your business	Number	Percent
Significantly higher than your expectations	9	11.4 %
Higher than your expectations	22	27.8 %
Meets your expectations	38	48.1 %
Below your expectations	3	3.8 %
Don't know/Unsure	7	8.9 %
Total	79	100.0 %

Missing Cases = 1
 Response Percent = 98.7 %

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")

Q3. How satisfied are you with overall quality of services provided to your business	Number	Percent
Significantly higher than your expectations	9	12.5 %
Higher than your expectations	22	30.6 %
Meets your expectations	38	52.8 %
Below your expectations	3	4.2 %
Total	72	100.0 %

Missing Cases = 7
 Response Percent = 91.1 %

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=79)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q4a. Supporting business growth & development	16.5%	31.6%	19.0%	8.9%	6.3%	17.7%
Q4b. Availability of employee & customer parking around your business	12.7%	24.1%	21.5%	7.6%	6.3%	27.8%
Q4c. Condition of sidewalks	22.8%	36.7%	12.7%	1.3%	1.3%	25.3%
Q4d. Creating & promoting special events	26.6%	45.6%	11.4%	0.0%	2.5%	13.9%
Q4e. Historic preservation efforts	27.8%	32.9%	16.5%	2.5%	5.1%	15.2%
Q4f. Cleanliness of streets	54.4%	38.0%	2.5%	1.3%	0.0%	3.8%
Q4g. Landscape maintenance in rights of way & public areas	50.6%	35.4%	5.1%	2.5%	1.3%	5.1%

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=79)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q4a. Supporting business growth & development	20.0%	38.5%	23.1%	10.8%	7.7%
Q4b. Availability of employee & customer parking around your business	17.5%	33.3%	29.8%	10.5%	8.8%
Q4c. Condition of sidewalks	30.5%	49.2%	16.9%	1.7%	1.7%
Q4d. Creating & promoting special events	30.9%	52.9%	13.2%	0.0%	2.9%
Q4e. Historic preservation efforts	32.8%	38.8%	19.4%	3.0%	6.0%
Q4f. Cleanliness of streets	56.6%	39.5%	2.6%	1.3%	0.0%
Q4g. Landscape maintenance in rights of way & public areas	53.3%	37.3%	5.3%	2.7%	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."

(N=79)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Don't know
Q5a. Overall image of Village	49.4%	38.0%	6.3%	5.1%	1.3%
Q5b. Overall quality of life	50.6%	39.2%	7.6%	0.0%	2.5%
Q5c. Overall feeling of safety during daytime	69.6%	26.6%	2.5%	0.0%	1.3%
Q5d. Overall feeling of safety during evening/night	49.4%	35.4%	10.1%	0.0%	5.1%

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=79)

	Very satisfied	Satisfied	Neutral	Dissatisfied
Q5a. Overall image of Village	50.0%	38.5%	6.4%	5.1%
Q5b. Overall quality of life	51.9%	40.3%	7.8%	0.0%
Q5c. Overall feeling of safety during daytime	70.5%	26.9%	2.6%	0.0%
Q5d. Overall feeling of safety during evening/night	52.0%	37.3%	10.7%	0.0%

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

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

	Number	Percent
Very likely	33	41.8 %
Likely	21	26.6 %
Somewhat likely	14	17.7 %
Not likely	5	6.3 %
Not likely at all	3	3.8 %
Don't know/Unsure	3	3.8 %
Total	79	100.0 %

Missing Cases = 0

Response Percent = 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	33	43.4 %
Likely	21	27.6 %
Somewhat likely	14	18.4 %
Not likely	5	6.6 %
Not likely at all	3	3.9 %
Total	76	100.0 %

Missing Cases = 3

Response Percent = 96.2 %

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	26	32.9 %
No change, but good	27	34.2 %
No change, but poor	9	11.4 %
Worse	6	7.6 %
Don't know/Unsure	11	13.9 %
Total	79	100.0 %

Missing Cases = 0
 Response Percent = 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	26	38.2 %
No change, but good	27	39.7 %
No change, but poor	9	13.2 %
Worse	6	8.8 %
Total	68	100.0 %

Missing Cases = 11
 Response Percent = 86.1 %

**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	27	34.2 %
Good	36	45.6 %
Poor	1	1.3 %
Very poor	1	1.3 %
Don't know/Unsure	14	17.7 %
Total	79	100.0 %

Missing Cases = 0
Response Percent = 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	27	41.5 %
Good	36	55.4 %
Poor	1	1.5 %
Very poor	1	1.5 %
Total	65	100.0 %

Missing Cases = 14
Response Percent = 82.3 %

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=79)

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Don't know
Q9a. Village staff was responsive to my needs	38.0%	22.8%	5.1%	2.5%	1.3%	30.4%
Q9b. Village staff was competent & professional	38.0%	24.1%	6.3%	1.3%	0.0%	30.4%
Q9c. Village staff was courteous	43.0%	22.8%	3.8%	0.0%	0.0%	30.4%

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=79)

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
Q9a. Village staff was responsive to my needs	54.5%	32.7%	7.3%	3.6%	1.8%
Q9b. Village staff was competent & professional	54.5%	34.5%	9.1%	1.8%	0.0%
Q9c. Village staff was courteous	61.8%	32.7%	5.5%	0.0%	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	19	24.1 %
Satisfied	30	38.0 %
Neutral	17	21.5 %
Dissatisfied	3	3.8 %
Don't know	10	12.7 %
Total	79	100.0 %

Missing Cases = 0
 Response Percent = 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	19	27.5 %
Satisfied	30	43.5 %
Neutral	17	24.6 %
Dissatisfied	3	4.3 %
Total	69	100.0 %

Missing Cases = 10
 Response Percent = 87.3 %

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	48	60.8 %
No	30	38.0 %
Don't know/Unsure	1	1.3 %
Total	79	100.0 %

Missing Cases = 0
 Response Percent = 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	48	61.5 %
No	30	38.5 %
Total	78	100.0 %

Missing Cases = 1
 Response Percent = 98.7 %

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=48)

	Very good	Good	Average	Poor	Very poor	Don't know
Q12a. Easy to navigate	22.9%	43.8%	29.2%	0.0%	0.0%	4.2%
Q12b. Informative content	25.0%	41.7%	20.8%	4.2%	2.1%	6.3%
Q12c. Useful	20.8%	41.7%	29.2%	0.0%	0.0%	8.3%

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=48)

	Very good	Good	Average	Poor	Very poor
Q12a. Easy to navigate	23.9%	45.7%	30.4%	0.0%	0.0%
Q12b. Informative content	26.7%	44.4%	22.2%	4.4%	2.2%
Q12c. Useful	22.7%	45.5%	31.8%	0.0%	0.0%

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	12	25.0 %
Satisfied	25	52.1 %
Neutral	10	20.8 %
Don't know	1	2.1 %
Total	48	100.0 %

Missing Cases = 0
 Response Percent = 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	12	25.5 %
Satisfied	25	53.2 %
Neutral	10	21.3 %
Total	47	100.0 %

Missing Cases = 1
 Response Percent = 97.9 %

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	37	46.8 %
Village website	17	21.5 %
Email	55	69.6 %
Merchant meetings	10	12.7 %
Social media	5	6.3 %
Personal calls and/or visits	20	25.3 %
Newsletters	24	30.4 %
Brochures	5	6.3 %
Other	2	2.5 %
<u>None chosen</u>	<u>2</u>	<u>2.5 %</u>
Total	177	

Number of Cases = 79

Number of Responses = 177

Average Number Of Responses Per Case = 2.2

Number Of Cases With At Least One Response = 79

Response Percent = 100.0 %

Q14. Other

Q14 Other

AUTOMATED CALLS

FACEBOOK PAGE IMPROVED

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=79)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Don't know
Q15a. Zoning ordinances	12.7%	32.9%	22.8%	3.8%	0.0%	27.8%
Q15b. Business signage regulations	12.7%	30.4%	17.7%	15.2%	5.1%	19.0%
Q15c. Historic District Guidelines	20.3%	22.8%	21.5%	6.3%	2.5%	26.6%

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=79)

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied
Q15a. Zoning ordinances	17.5%	45.6%	31.6%	5.3%	0.0%
Q15b. Business signage regulations	15.6%	37.5%	21.9%	18.8%	6.3%
Q15c. Historic District Guidelines	27.6%	31.0%	29.3%	8.6%	3.4%

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=79)

	About right amount	Too few	Too many	Don't know
Q16a. Restaurants	46.8%	44.3%	2.5%	6.3%
Q16b. Evening entertainment venues	39.2%	50.6%	1.3%	8.9%
Q16c. Cultural activities (live music, art festivals, etc.)	43.0%	44.3%	1.3%	11.4%
Q16d. Family friendly activities (movies in the park, etc.)	35.4%	45.6%	2.5%	16.5%
Q16e. Major special events (Holly Arts & Crafts Festival, parades, etc.)	48.1%	41.8%	2.5%	7.6%

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=79)

	About right amount	Too few	Too many
Q16a. Restaurants	50.0%	47.3%	2.7%
Q16b. Evening entertainment venues	43.1%	55.6%	1.4%
Q16c. Cultural activities (live music, art festivals, etc.)	48.6%	50.0%	1.4%
Q16d. Family friendly activities (movies in the park, etc.)	42.4%	54.5%	3.0%
Q16e. Major special events (Holly Arts & Crafts Festival, parades, etc.)	52.1%	45.2%	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 are you with Village handling events that attract large crowds	Number	Percent
Very satisfied	28	35.4 %
Satisfied	34	43.0 %
Neutral	5	6.3 %
Dissatisfied	6	7.6 %
Don't know/Unsure	6	7.6 %
Total	79	100.0 %

Missing Cases = 0
 Response Percent = 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	28	38.4 %
Satisfied	34	46.6 %
Neutral	5	6.8 %
Dissatisfied	6	8.2 %
Total	73	100.0 %

Missing Cases = 6
 Response Percent = 92.4 %

Q18. DEMOGRAPHIC/OTHER INFORMATION. Please indicate the primary business category for your business: (without "not provided")

Q18. Primary business category for your business	Number	Percent
Professional, Scientific, & Technical Services	18	22.8 %
Health Care & Social Assistance	13	16.5 %
Real Estate & Rental Leasing	9	11.4 %
Retail	8	10.1 %
Financial & Insurance	7	8.9 %
Restaurants & Food Services	6	7.6 %
Inn	2	2.5 %
Other	18	22.8 %
Total	81	

Number of Cases = 79

Number of Responses = 81

Average Number Of Responses Per Case = 1.0

Number Of Cases With At Least One Response = 79

Response Percent = 100.0 %

Q18. Other

Q18 Other

CHURCH

CONSULTING

DENTAL OFFICE

MEIDA TV

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	15	19.0 %
6-10 years	17	21.5 %
11-15 years	8	10.1 %
16-20 years	11	13.9 %
20+ years	28	35.4 %
Total	79	100.0 %

Missing Cases = 0

Response Percent = 100.0 %

Q20. Please answer the following questions:

(N=79)

	Yes	No	Not provided
Q20a. Are you a member of Pinehurst Business Guild	16.5%	82.3%	1.3%
Q20b. Are you a member of Moore County Chamber of Commerce	39.2%	59.5%	1.3%
Q20c. Is your business located in Village Center	22.8%	75.9%	1.3%

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

(N=79)

	Yes	No
Q20a. Are you a member of Pinehurst Business Guild	16.7%	83.3%
Q20b. Are you a member of Moore County Chamber of Commerce	39.7%	60.3%
Q20c. Is your business located in Village Center	23.1%	76.9%

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=79)

	Extremely important	Very Important	Important	Less Important	Not Important	Not provided
Q21a. Overall image of Village	46.8%	24.1%	10.1%	2.5%	12.7%	3.8%
Q21b. Low crime rate	53.2%	13.9%	8.9%	7.6%	12.7%	3.8%
Q21c. Availability of trained employees	21.5%	24.1%	19.0%	8.9%	21.5%	5.1%
Q21d. Level of taxation	26.6%	22.8%	24.1%	3.8%	17.7%	5.1%
Q21e. Affordable rent	29.1%	16.5%	15.2%	1.3%	26.6%	11.4%
Q21f. Attitude of local government towards businesses	46.8%	21.5%	11.4%	2.5%	10.1%	7.6%

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=79)

	Extremely important	Very Important	Important	Less Important	Not important
Q21a. Overall image of Village	48.7%	25.0%	10.5%	2.6%	13.2%
Q21b. Low crime rate	55.3%	14.5%	9.2%	7.9%	13.2%
Q21c. Availability of trained employees	22.7%	25.3%	20.0%	9.3%	22.7%
Q21d. Level of taxation	28.0%	24.0%	25.3%	4.0%	18.7%
Q21e. Affordable rent	32.9%	18.6%	17.1%	1.4%	30.0%
Q21f. Attitude of local government towards businesses	50.7%	23.3%	12.3%	2.7%	11.0%



HISTORY, CHARM, AND SOUTHERN HOSPITALITY _____

August 2014

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 that reads "Natalie E. Dean". The signature is fluid and cursive.

Natalie E. Dean
Assistant Village Manager

ADMINISTRATION

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



2014 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 _____ (4) Below your expectations
 _____ (2) Higher than your expectations _____ (5) Significantly below your expectations
 _____ (3) Meets 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

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 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

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.