

# ***2018 Resident Survey***

## ***Village of Pinehurst, NC***

Presented by

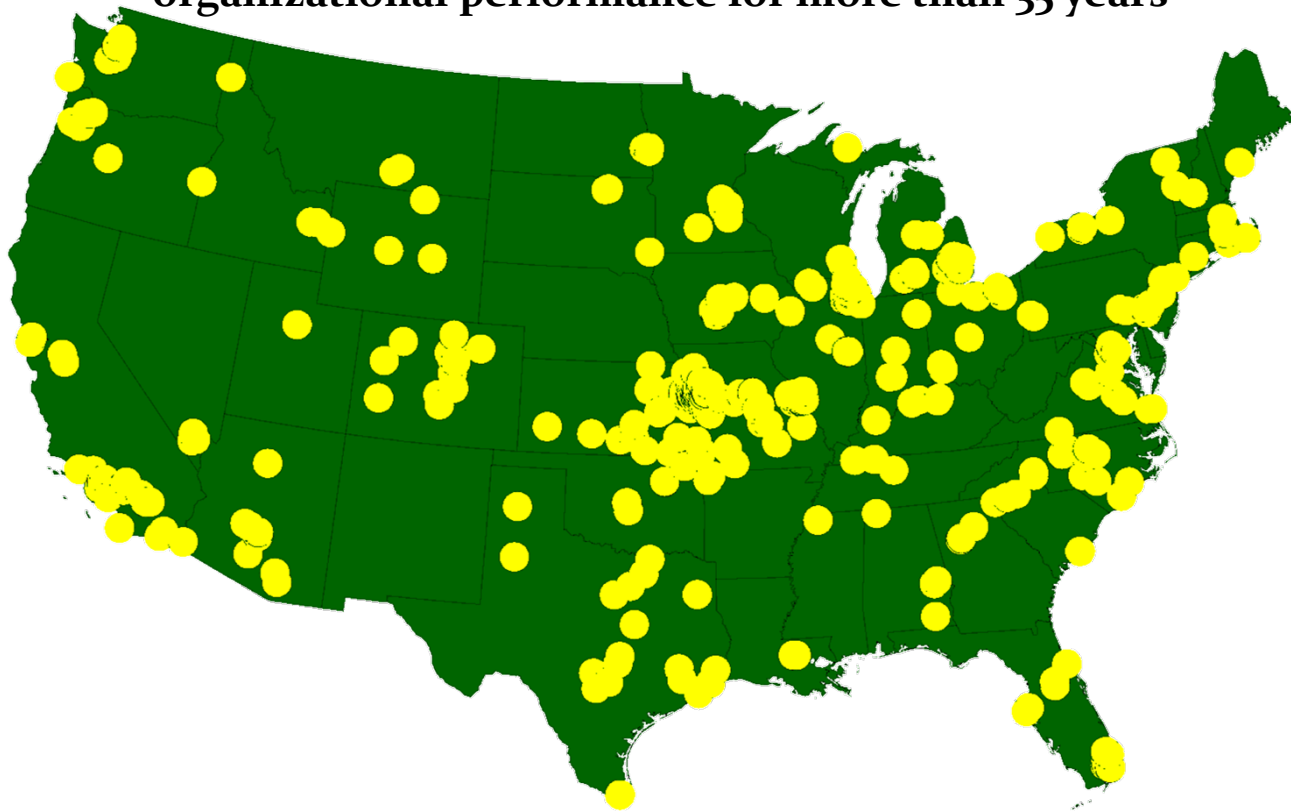


September 2018

# ETC Institute

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for more than 900 cities in 49 States

# Purpose

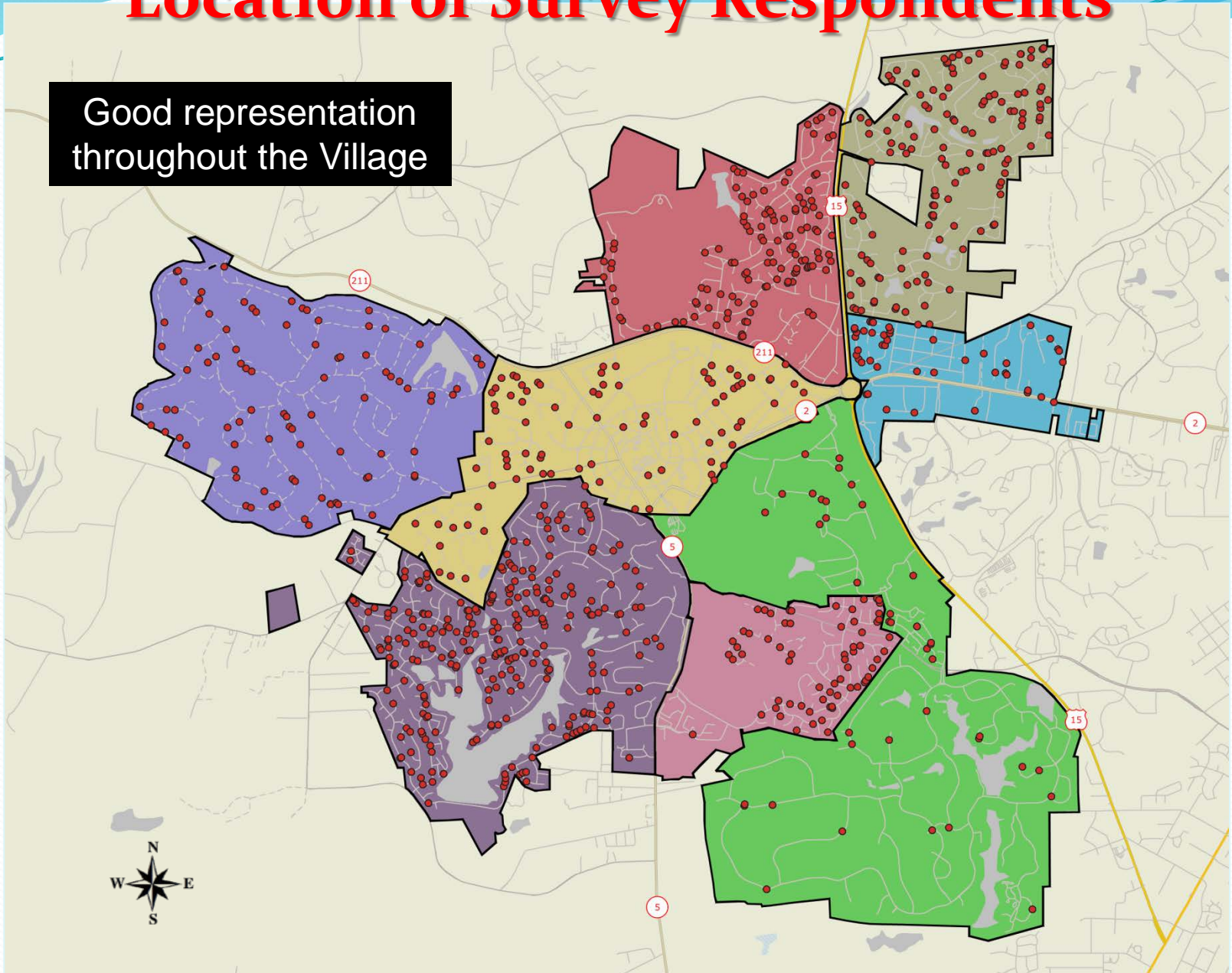
- **To objectively assess citizen satisfaction with the delivery of major Village services**
- **To measure trends from previous surveys**
- **To compare the Village's performance with residents regionally and nationally**
- **To help determine priorities for the community**

# Methodology

- **Survey Description**
  - ❑ seven-page survey; included many of the same questions that were asked in previous years
  - ❑ 7<sup>th</sup> Resident Survey conducted for the Village
- **Method of Administration**
  - ❑ by mail and online to a random sample of Village residents
  - ❑ each survey took approximately 15-20 minutes to complete
- **Sample size:**
  - ❑ goal number of surveys: 700
  - ❑ goal far exceeded: 906 completed surveys
  - ❑ demographics of survey respondents accurately reflects the actual population of the Village
- **Confidence level:** 95%
- **Margin of error:** +/- 3.3% overall

# Location of Survey Respondents

Good representation throughout the Village



Village of Pinehurst 2018 Resident Survey

# Bottom Line Up Front

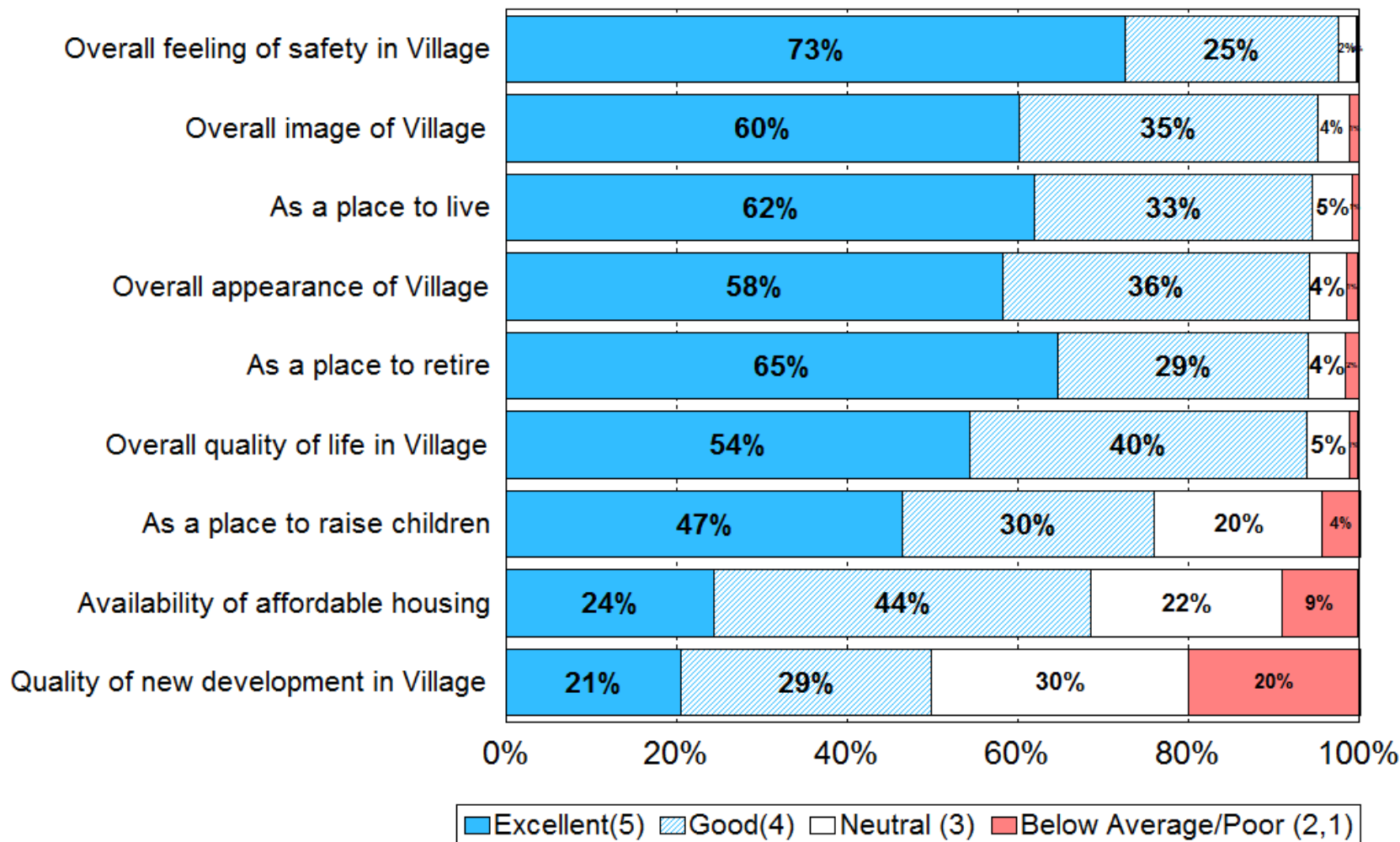
- **Residents Have a Very Positive Perception of the Village**
  - ❑ 95% rated Pinehurst as excellent or good place to live
  - ❑ 94% would recommend Pinehurst to others as a place to live
- **Satisfaction Ratings Are Similar to 2017, and Remain Among the Highest in the Nation**
  - ❑ Satisfaction ratings have increased or stayed the same in 45 of 86 areas since 2017; and increased or stayed the same in 70 of 80 areas since 2013
- **Satisfaction with Village Services is Much Higher in Pinehurst Than Other Communities**
  - ❑ The Village rated above the U.S. Average in 50 of 53 areas, and above the Atlantic Regional Average in 46 of the 53 areas that were compared
- **Overall Priorities for Improvement:**
  - ❑ Efforts at maintaining the quality of neighborhoods
  - ❑ Street and right-of-way maintenance
  - ❑ Level of public involvement in local decisions

# *Major Finding #1*

Residents Have a Very Positive  
Perception of the Village

# Q4. Perception Residents Have of Pinehurst as a Community

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



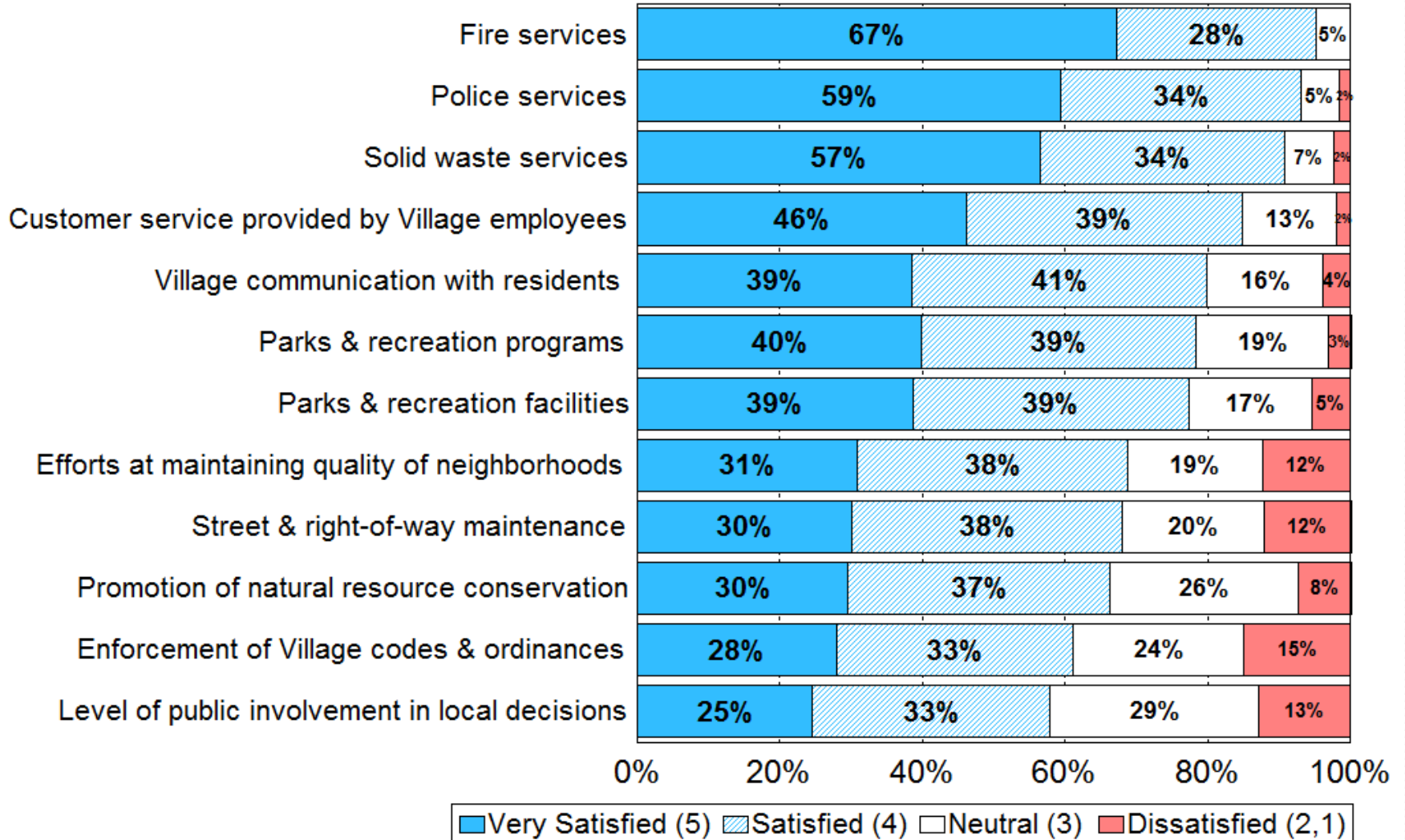
Source: ETC Institute DirectionFinder (2018 - Pinehurst, NC)

**Nearly All Residents Feel Pinehurst Is an Excellent or Good Place to Live, to Retire, and Feel Safe in the Village**



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

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

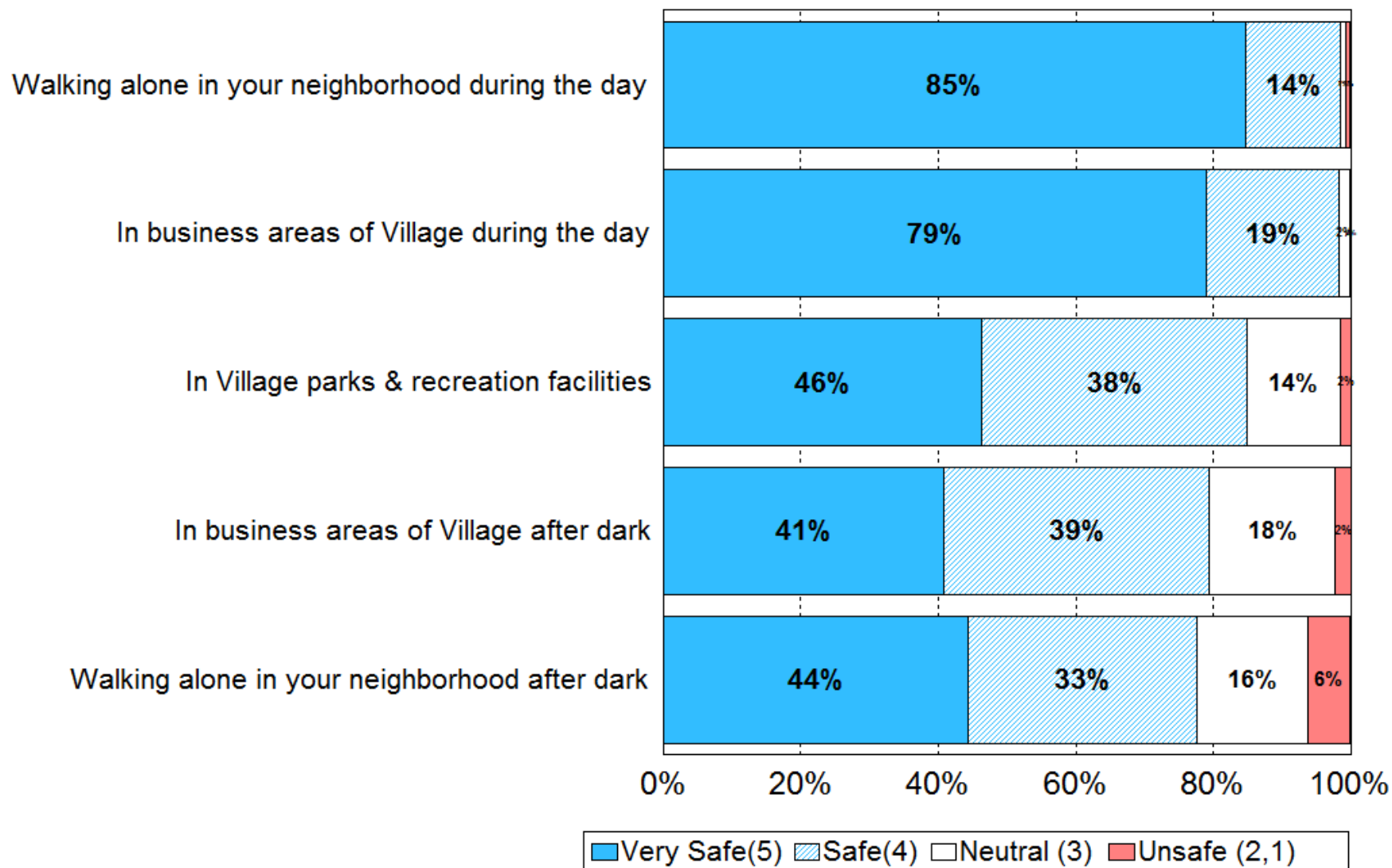


Source: ETC Institute DirectionFinder (2018 - Pinehurst, NC)

**Satisfaction Is High for All Village Services**

# Q5. Perceptions of Safety and Security in Pinehurst

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

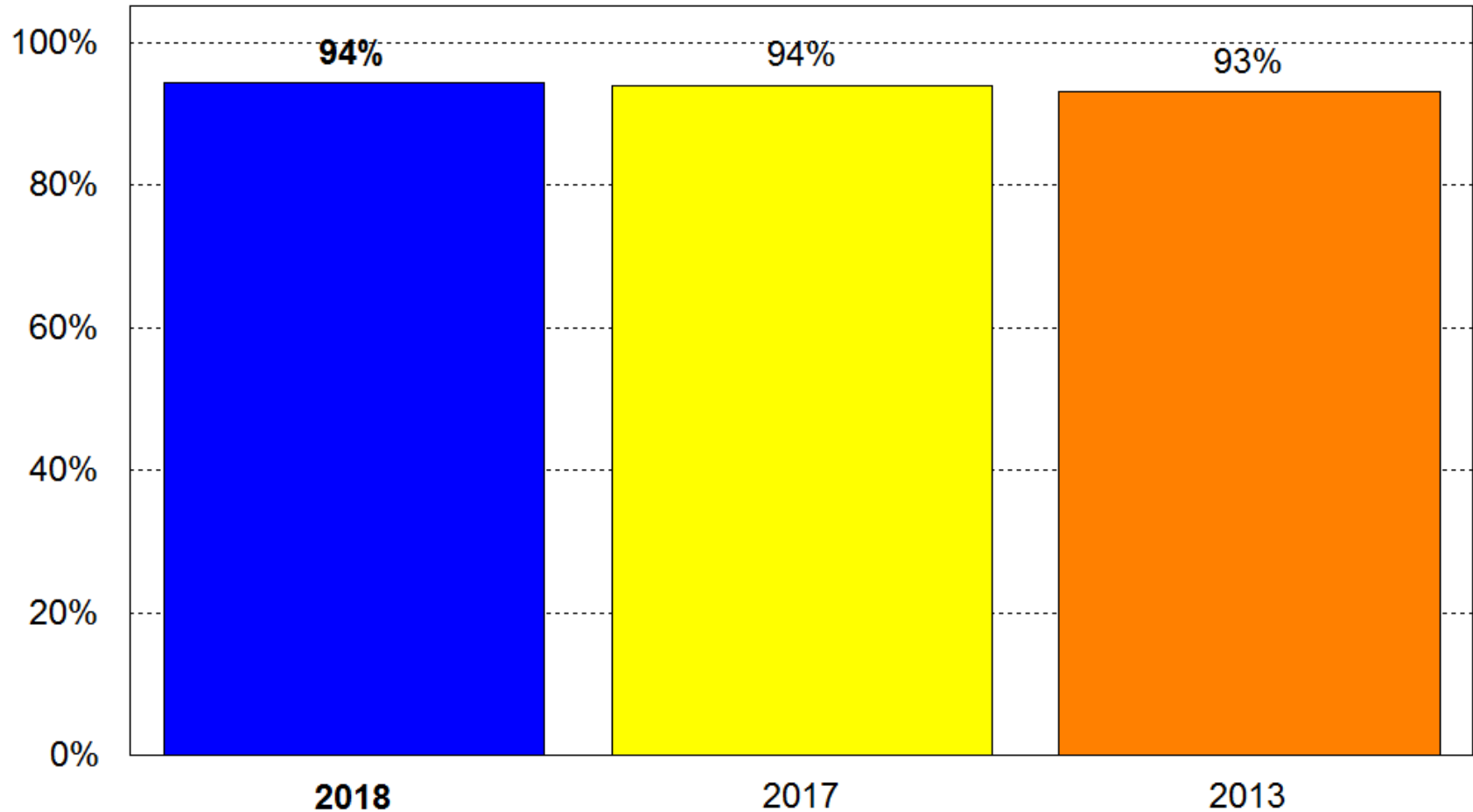


Source: ETC Institute DirectionFinder (2018 - Pinehurst, NC)

**Residents Feel Safe in Pinehurst**

# Q26. Would you recommend Pinehurst to others as a place to live?

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



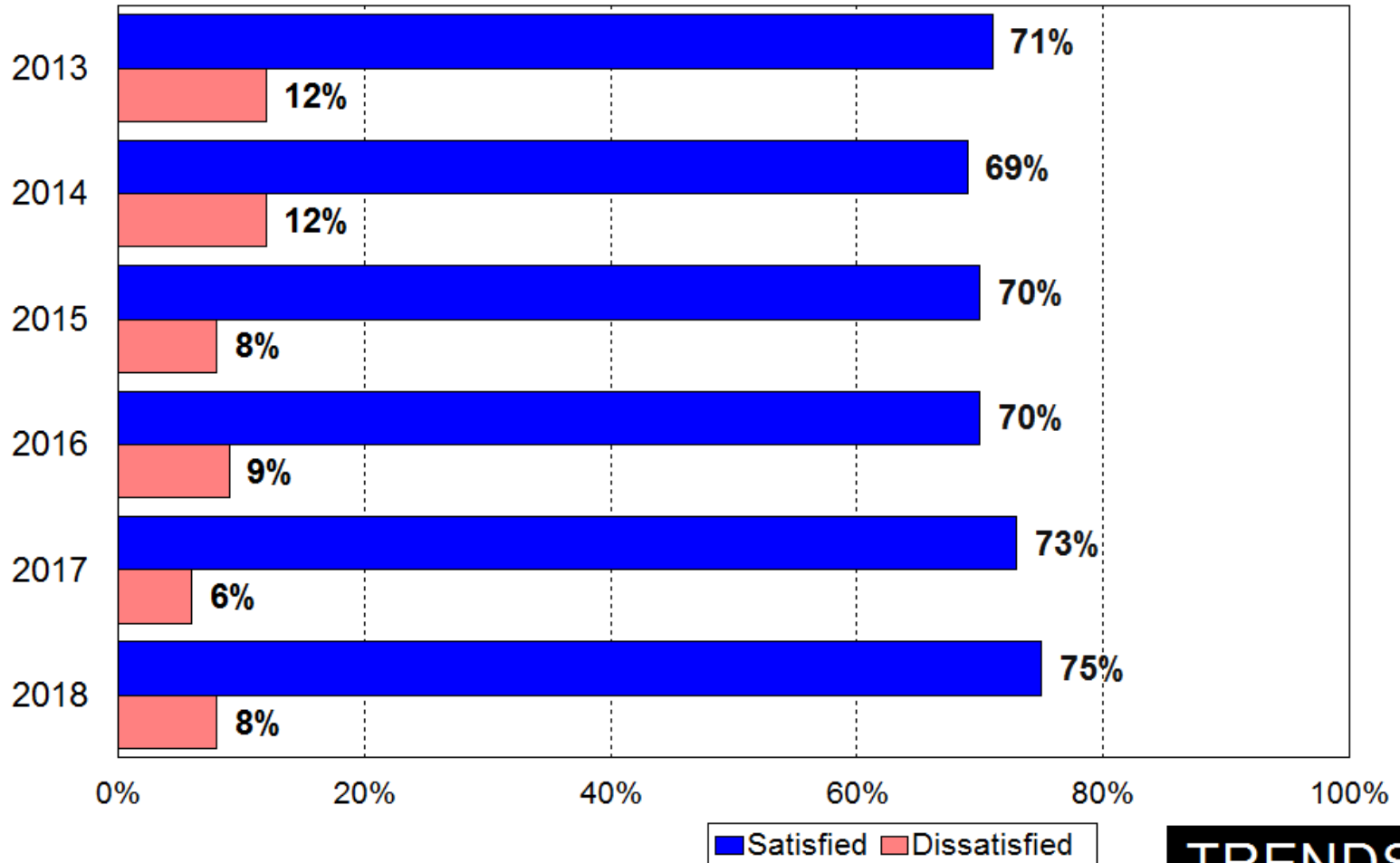
Source: ETC Institute DirectionFinder (2018 - Pinehurst, NC)

**TRENDS**

**94% of Residents Would Recommend Pinehurst to Others as a Place to Live**

# Q24. What is your level of satisfaction with the value you receive for the portion of your property taxes that funds the Village's operating budget?

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



Source: ETC Institute DirectionFinder (2018 - Pinehurst, NC)

**TRENDS**

**More Than a 9-1 Ratio of Residents Who Are Satisfied vs. Dissatisfied (75% vs. 8%) with the Value Received for Property Taxes Funding the Village's Operating Budget**

## *Major Finding #2*

Satisfaction Ratings Are Similar to 2017, and Remain Among the Highest in the Nation

# Short-Term Trends

## Notable Short-Term Increases Since 2017

- ❑ Quality of leadership provided by elected officials (+10%)
- ❑ Level of public involvement in local decisions (+7%)
- ❑ Enforcing moving/cutting of weeds/grass (+6%)
- ❑ Effectiveness of appointed boards/commissioners (+6%)
- ❑ Open Village Hall community forum (+5%)

## Notable Short-Term Decreases Since 2017

- ❑ Range of amenities at parks & recreation facilities (-12%)
- ❑ Quality of outdoor athletic fields/facilities (-8%)
- ❑ Village website (-7%)
- ❑ Winter weather response on Village streets (-7%)
- ❑ Enforcement of local traffic laws (-7%)

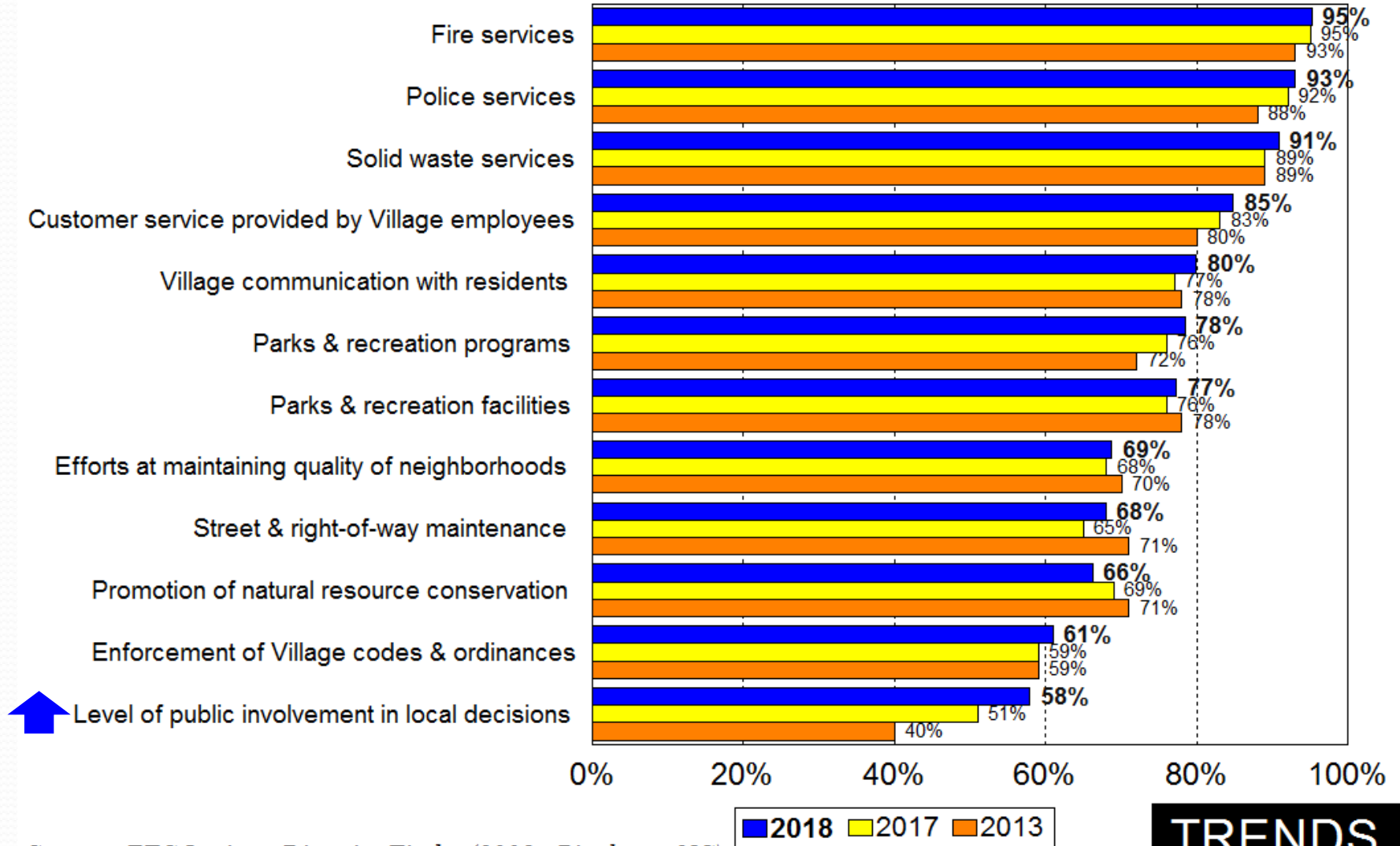
# Long-Term Trends

## Notable Long-Term Increases Since 2013

- ❑ Condition of existing walkways (+22%)
- ❑ Given Memorial Library programs (+22%)
- ❑ Availability of walkways (+19%)
- ❑ Level of public involvement in local decisions (+18%)
- ❑ Adequacy of street lighting (+12%)
- ❑ Quality of stormwater runoff/management system (+10%)
- ❑ Availability of info about recreation programs (+9%)
- ❑ Effectiveness of appointed board & commissions (+8)
- ❑ Range of amenities at parks & recreation facilities (+7%)
- ❑ Progress towards strategic vision & mission (+6%)
- ❑ Parks and recreation programs (+6%)
- ❑ Yard waste collection services (+6%)

# Q1. Overall Satisfaction with Village of Pinehurst Services by Major Category - 2018, 2017 & 2013

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



Source: ETC Institute DirectionFinder (2018 - Pinehurst, NC)

**TRENDS**

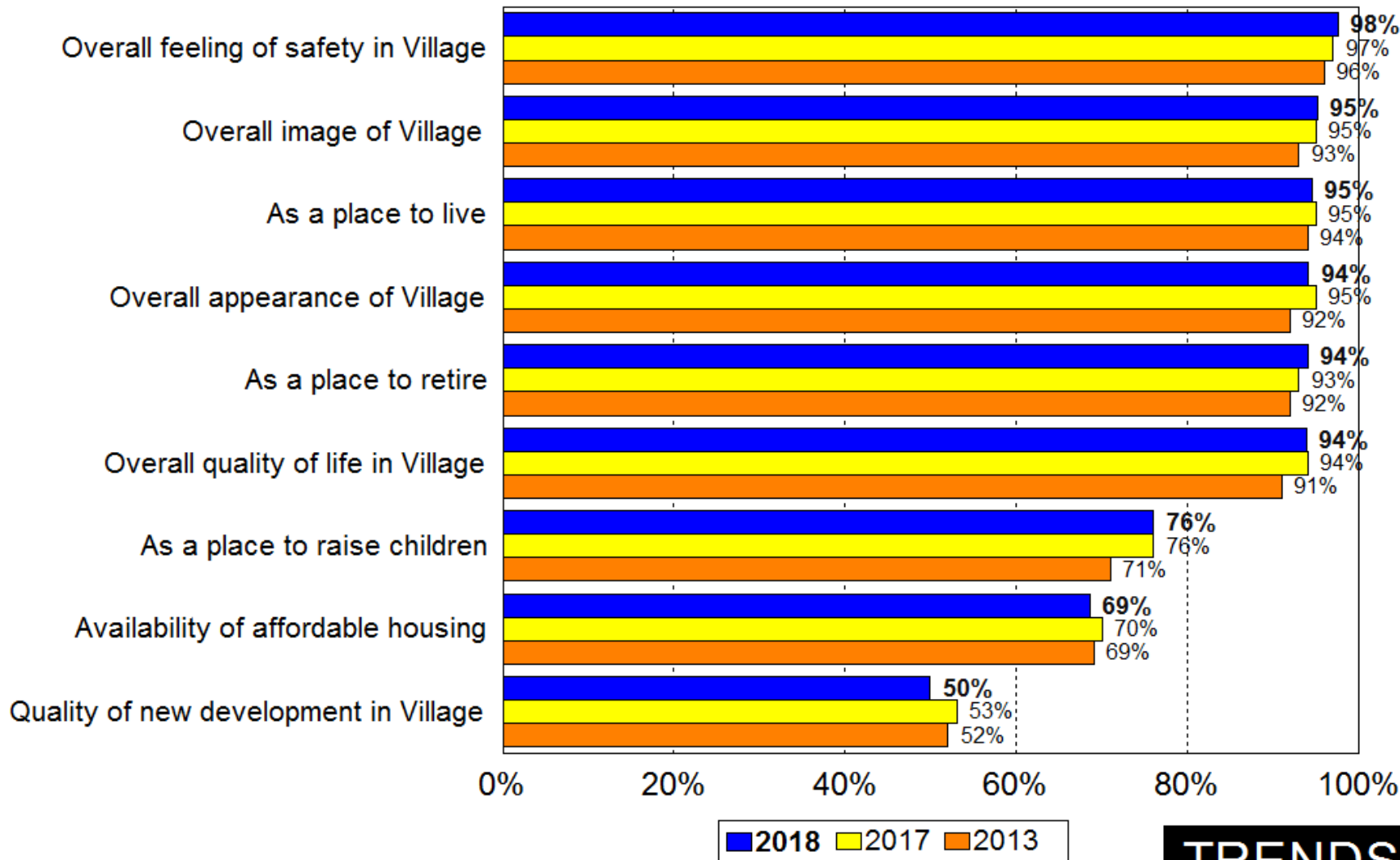
**Significant Increases From 2017:**

**Significant Decreases From 2017:**



# Q4. Perception Residents Have of Pinehurst as a Community - 2018, 2017 & 2013

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



Source: ETC Institute DirectionFinder (2018 - Pinehurst, NC)

**TRENDS**

**Significant Increases From 2017:** 

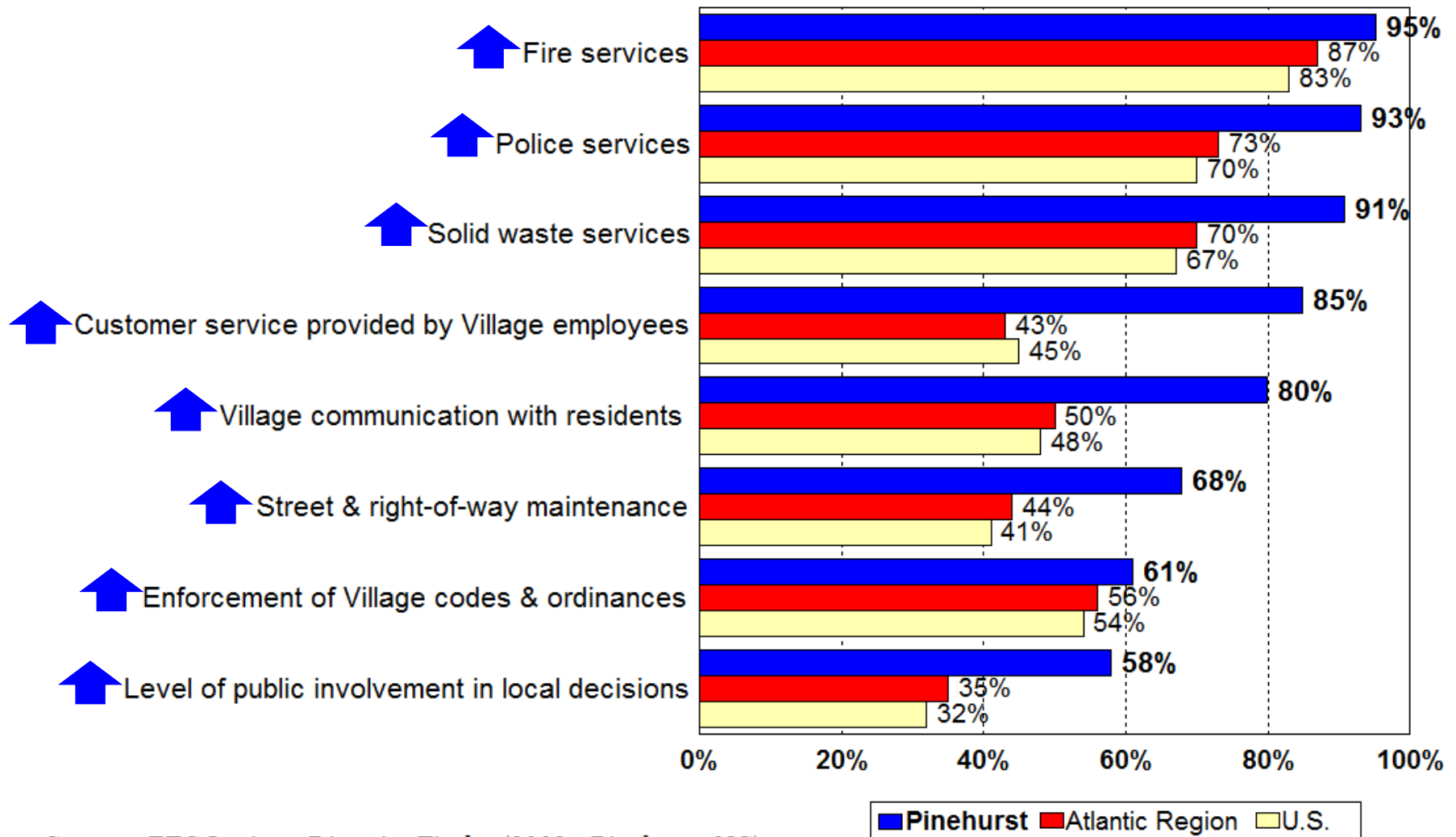
**Significant Decreases From 2017:** 

## *Major Finding #3*

Satisfaction with Village Services  
Is Much Higher in Pinehurst  
Than in Other Communities

# Overall Satisfaction with Various Community Services Pinehurst vs. Atlantic Region vs. the U.S.

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



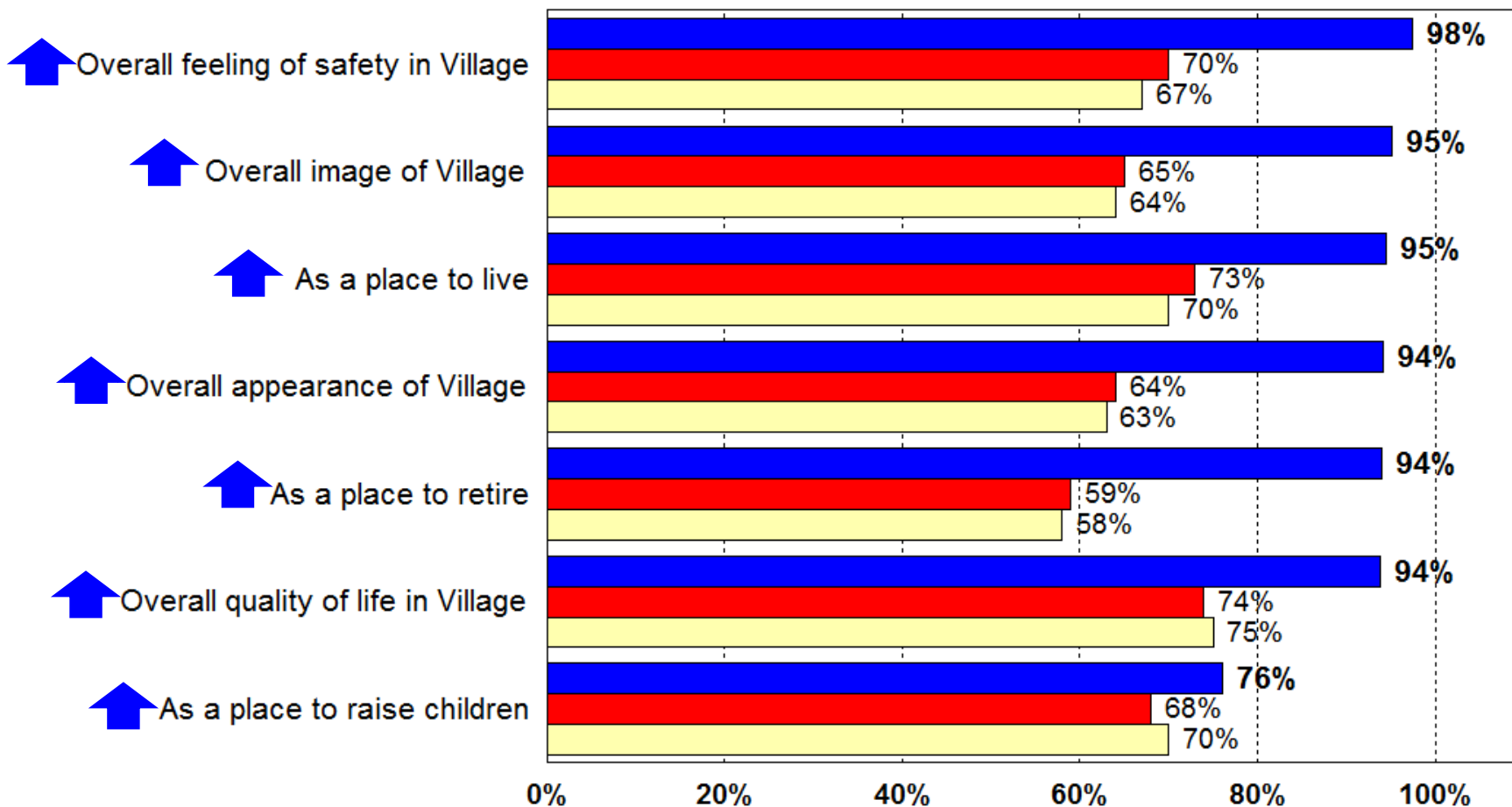
Source: ETC Institute DirectionFinder (2018 - Pinehurst, NC)

**Significantly Higher:** ↑

**Significantly Lower:** ↓

# Satisfaction with Issues that Influence Perceptions of the Village Pinehurst vs. Atlantic Region vs. the U.S.

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



Source: ETC Institute DirectionFinder (2018 - Pinehurst, NC)

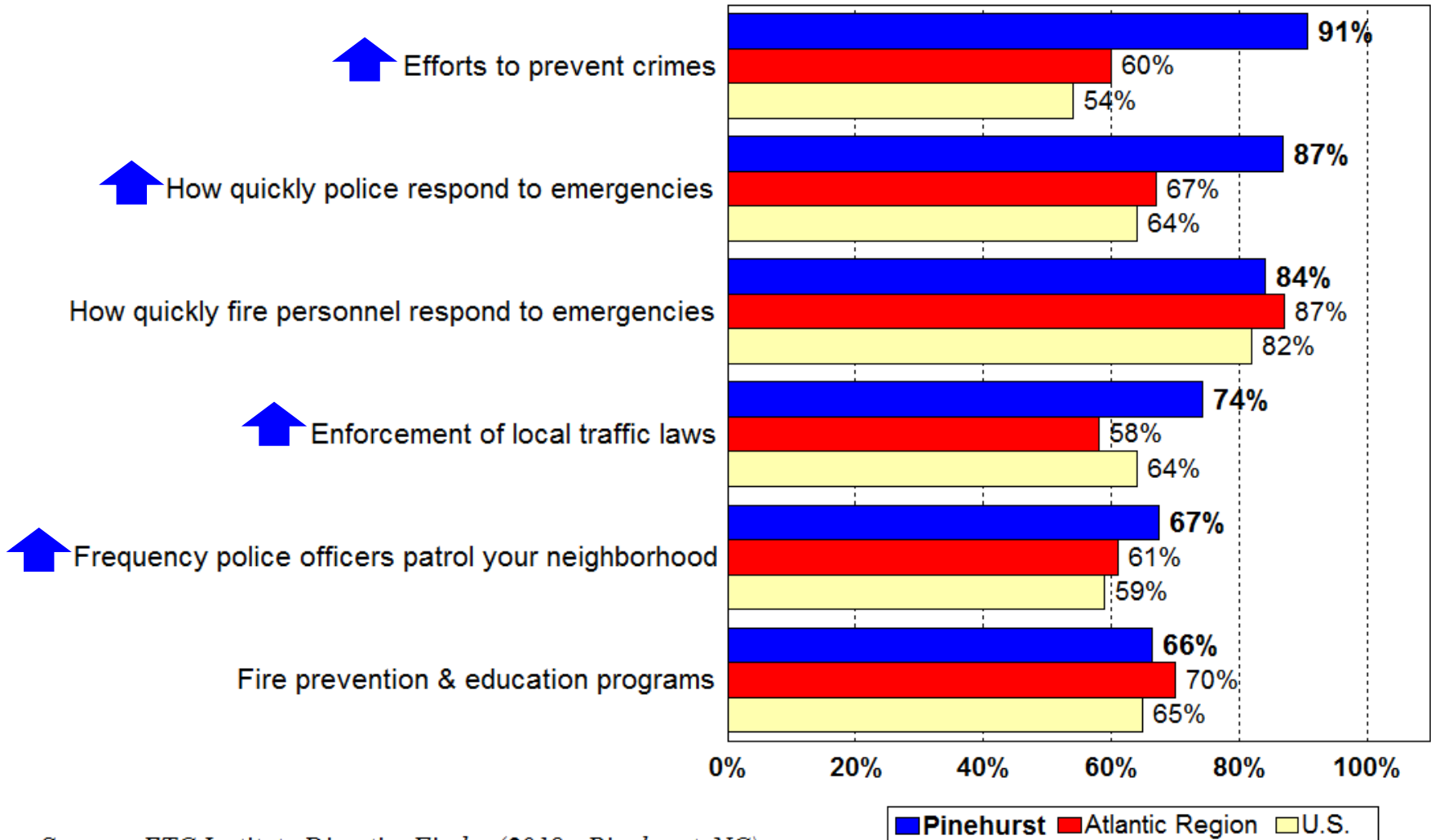
■ Pinehurst 
 ■ Atlantic Region 
 ■ U.S.

**Significantly Higher:** ↑

**Significantly Lower:** ↓

# Overall Satisfaction with Public Safety Services Pinehurst vs. Atlantic Region vs. the U.S.

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



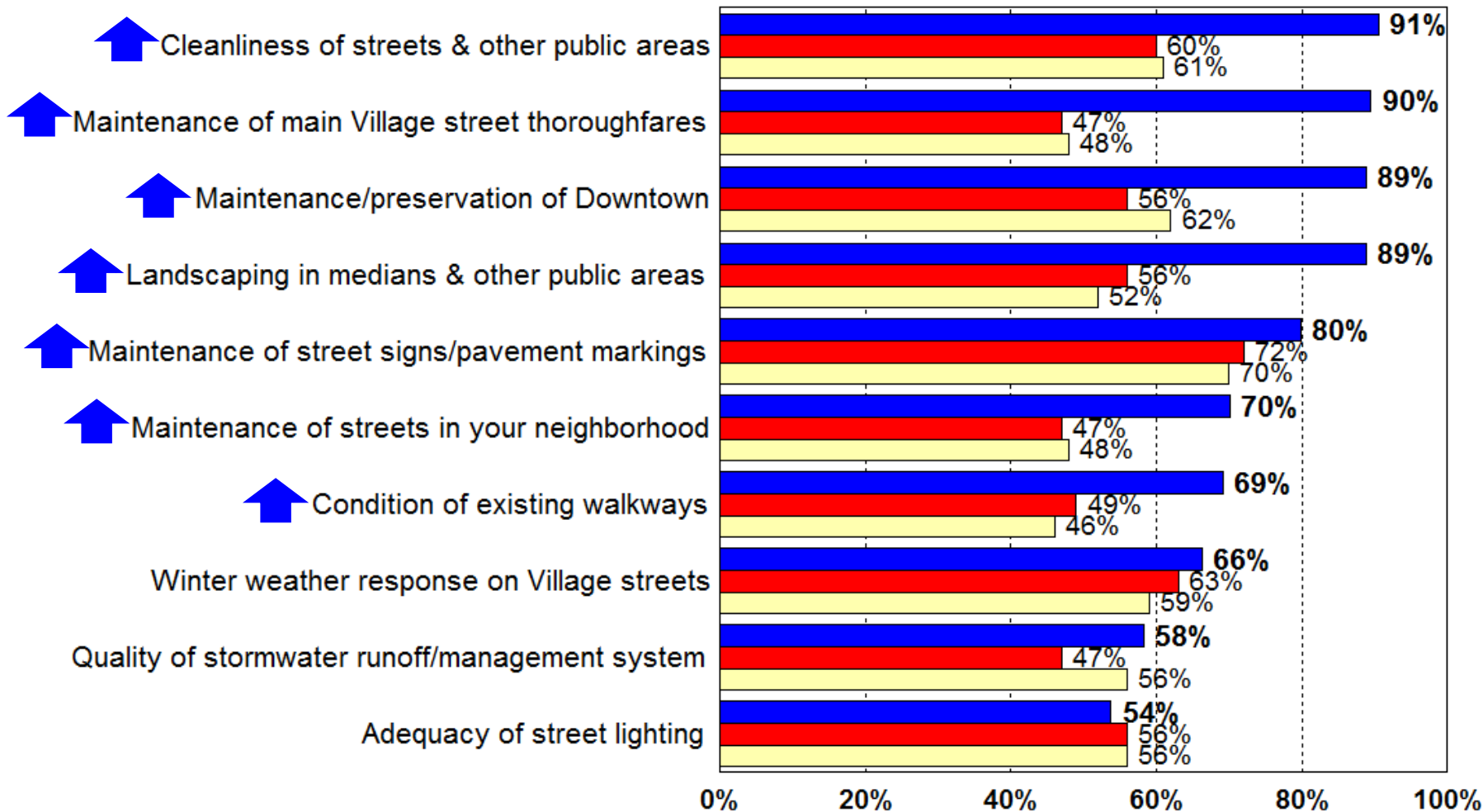
Source: ETC Institute DirectionFinder (2018 - Pinehurst, NC)

**Significantly Higher:** ↑

**Significantly Lower:** ↓

# Overall Satisfaction with Public Services Pinehurst vs. Atlantic Region vs. the U.S.

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



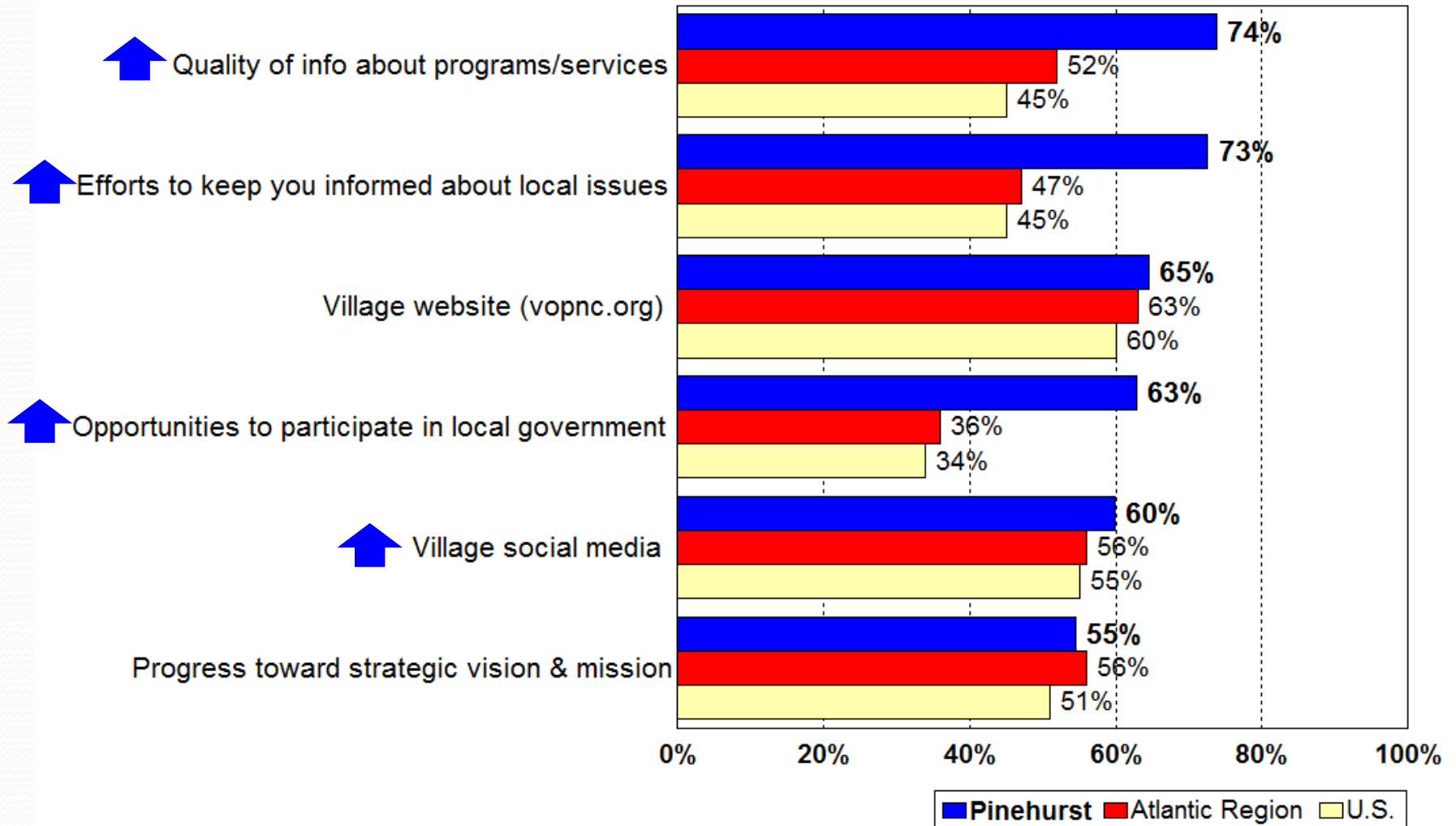
Source: ETC Institute DirectionFinder (2018 - Pinehurst, NC)

**Significantly Higher:** ↑

**Significantly Lower:** ↓

# Overall Satisfaction with Communication Pinehurst vs. Atlantic Region vs. the U.S.

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



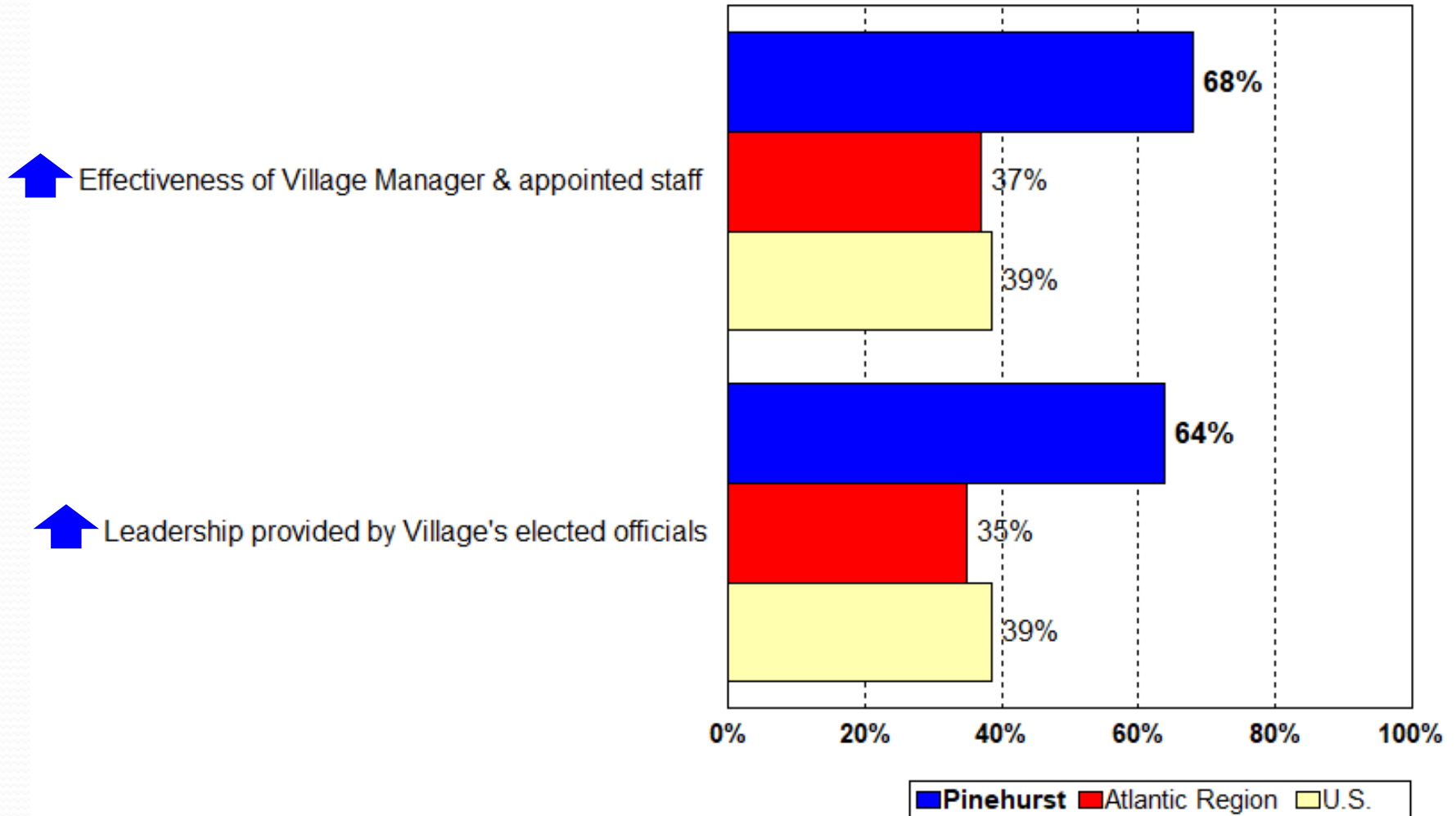
Source: ETC Institute DirectionFinder (2018 - Pinehurst, NC)

**Significantly Higher:** ↑

**Significantly Lower:** ↓

# Overall Satisfaction with Village Leadership Pinehurst vs. Atlantic Region vs. the U.S.

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



Source: ETC Institute DirectionFinder (2018 - Pinehurst, NC)

**Significantly Higher:** ↑

**Significantly Lower:** ↓



**Major Finding #4**  
**Priorities for Investment**

# 2018 Importance-Satisfaction Rating

## Village of Pinehurst, North Carolina

### Overall Satisfaction with Village Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b>High Priority (IS .10-.20)</b>						
Village efforts at maintaining quality of your neighborhood	42%	1	69%	8	0.1324	1
Street & right-of-way maintenance	40%	2	68%	9	0.1284	2
Level of public involvement in local decisions	26%	4	58%	12	0.1103	3
<b>Medium Priority (IS &lt;.10)</b>						
Enforcement of Village codes & ordinances	26%	5	61%	11	0.0998	4
Promotion of natural resource conservation	19%	7	66%	10	0.0656	5
Parks & recreation facilities	23%	6	77%	7	0.0529	6
Parks & recreation programs	18%	8	78%	6	0.0382	7
Village communication with residents	16%	9	80%	5	0.0328	8
Police services	27%	3	93%	2	0.0190	9
Solid waste services	9%	11	91%	3	0.0084	10
Fire services	15%	10	95%	1	0.0074	11
Customer service provided by Village employees	3%	12	85%	4	0.0046	12

**Overall Priorities:** 

# 2018 Importance-Satisfaction Rating

## Village of Pinehurst, North Carolina

### Overall Satisfaction with Public Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b><u>Very Priority (IS &gt;.20)</u></b>						
Ease of travel through large traffic circle	51%	1	37%	13	0.3204	1
Ease of travel on Highway 5	44%	2	39%	12	0.2713	2
<b><u>High Priority (IS .10-.20)</u></b>						
Adequacy of street lighting	31%	3	54%	10	0.1423	3
Availability of walkways	29%	4	53%	11	0.1349	4
<b><u>Medium Priority (IS &lt;.10)</u></b>						
Maintenance of streets in your neighborhood	23%	5	70%	6	0.0676	5
Quality of stormwater runoff/management system	16%	6	58%	9	0.0667	6
Winter weather response on Village streets (snow/ice)	15%	7	66%	8	0.0519	7
Condition of existing walkways	8%	12	69%	7	0.0243	8
Maintenance of main Village street thoroughfares	11%	8	90%	2	0.0119	9
Maintenance of street signs/pavement markings	6%	13	80%	5	0.0117	10
Maintenance/preservation of Downtown	9%	9	89%	3	0.0102	11
Quality of landscaping in medians & other public areas	9%	11	89%	4	0.0098	12
Overall cleanliness of streets & other public areas	9%	10	91%	1	0.0087	13

**Public Service Priorities:**

# 2018 Importance-Satisfaction Rating

## Village of Pinehurst, North Carolina

### Overall Satisfaction with Public Safety Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b>High Priority (IS .10-.20)</b>						
Frequency that police officers patrol your neighborhood	33%	2	67%	5	0.1079	1
<b>Medium Priority (IS &lt;.10)</b>						
Enforcement of local traffic laws	30%	3	74%	4	0.0776	2
Efforts to prevent crimes	55%	1	91%	1	0.0514	3
Fire prevention & education programs provided by Village	15%	6	66%	6	0.0499	4
How quickly police respond to emergencies	25%	4	87%	2	0.0324	5
How quickly fire personnel respond to emergencies	16%	5	84%	3	0.0259	6

**Public Safety Priorities:** 

# 2018 Importance-Satisfaction Rating

## Village of Pinehurst, North Carolina

### Overall Satisfaction with Cultural and Recreation Services

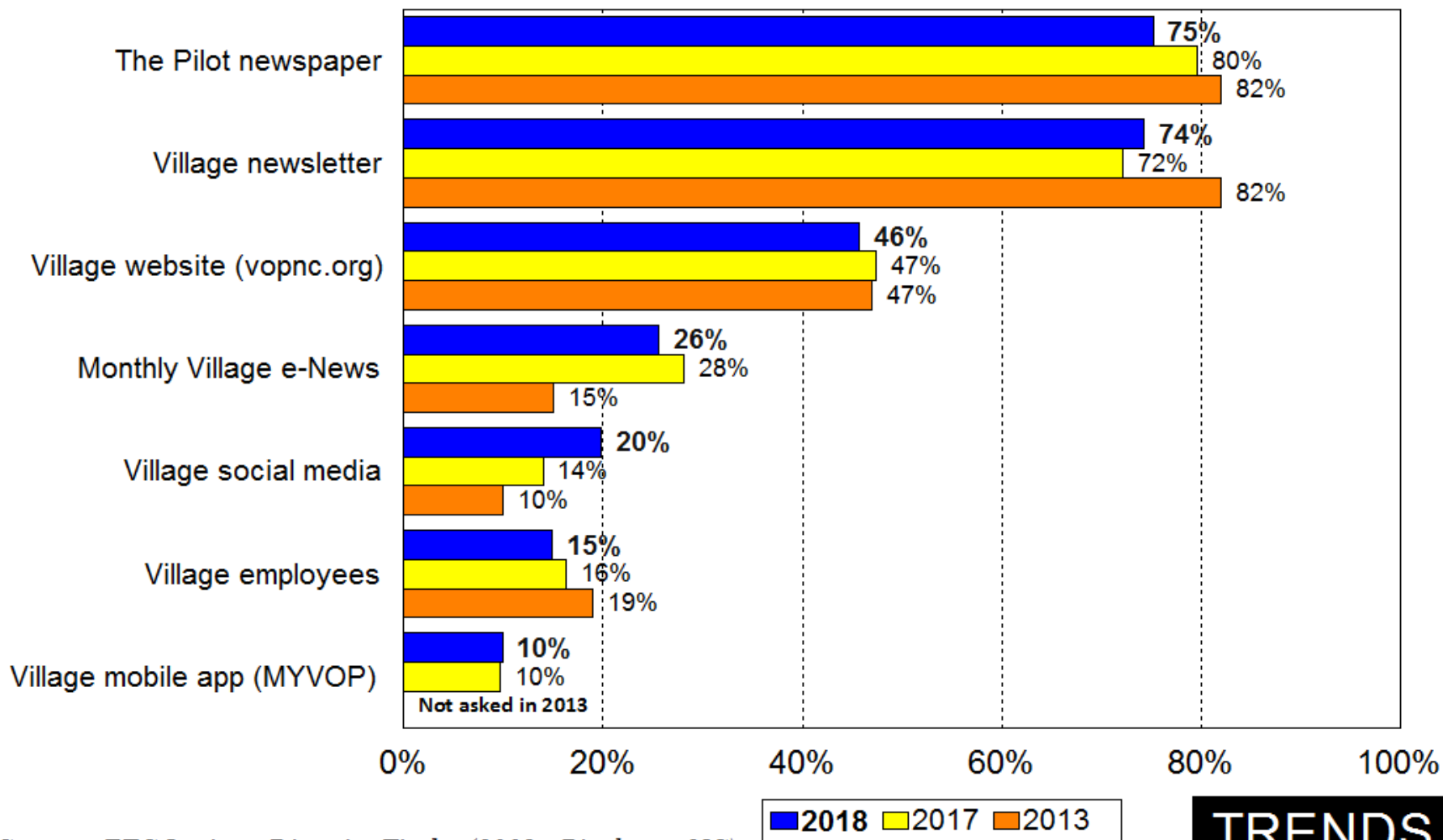
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<b>High Priority (IS .10-.20)</b>						
Availability of recreation indoor facilities	21%	5	39%	14	0.1300	1
<b>Medium Priority (IS &lt;.10)</b>						
Quality of adult recreation programs	19%	7	55%	11	0.0858	2
Quality of recreation indoor facilities	14%	10	43%	13	0.0809	3
Village sponsored cultural arts events	26%	1	69%	7	0.0794	4
Quality of youth recreation programs	16%	9	54%	12	0.0728	5
Range of amenities at parks & recreation facilities	16%	8	57%	10	0.0689	6
Variety of cultural arts events/programs in Southern Moore County	20%	6	70%	6	0.0602	7
Condition of walking/greenway trails	22%	3	79%	4	0.0471	8
Availability of information about recreation programs	13%	11	64%	9	0.0464	9
Availability of walking/greenway trails	23%	2	80%	3	0.0447	10
Quality of Village parks	21%	4	87%	1	0.0287	11
Quality of outdoor athletic fields & facilities	8%	13	70%	5	0.0240	12
Availability of outdoor athletic fields & facilities	4%	14	66%	8	0.0150	13
Number of Village parks	9%	12	85%	2	0.0131	14

**Cultural and Recreation Priorities:** 

# *Other Findings*

# Q19. Which of the following do you use to get information about the Village of Pinehurst? 2018, 2017 & 2013

by percentage of respondents (multiple selections could be made)

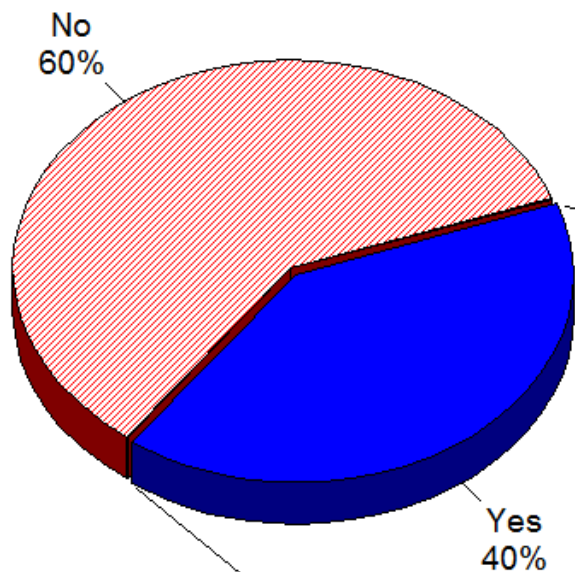


Source: ETC Institute DirectionFinder (2018 - Pinehurst, NC)

**TRENDS**

# Q22. Have you contacted the Village during the past year?

by percentage of respondents



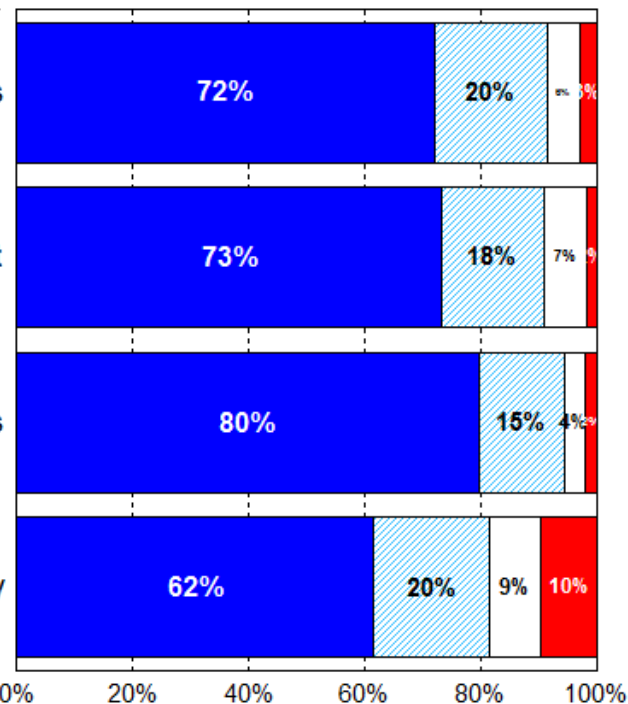
## Q22a-d. Only if you have contacted the Village during the past year

Village staff was responsive to my needs

Village staff was competent

Village staff was courteous

My issue was resolved promptly



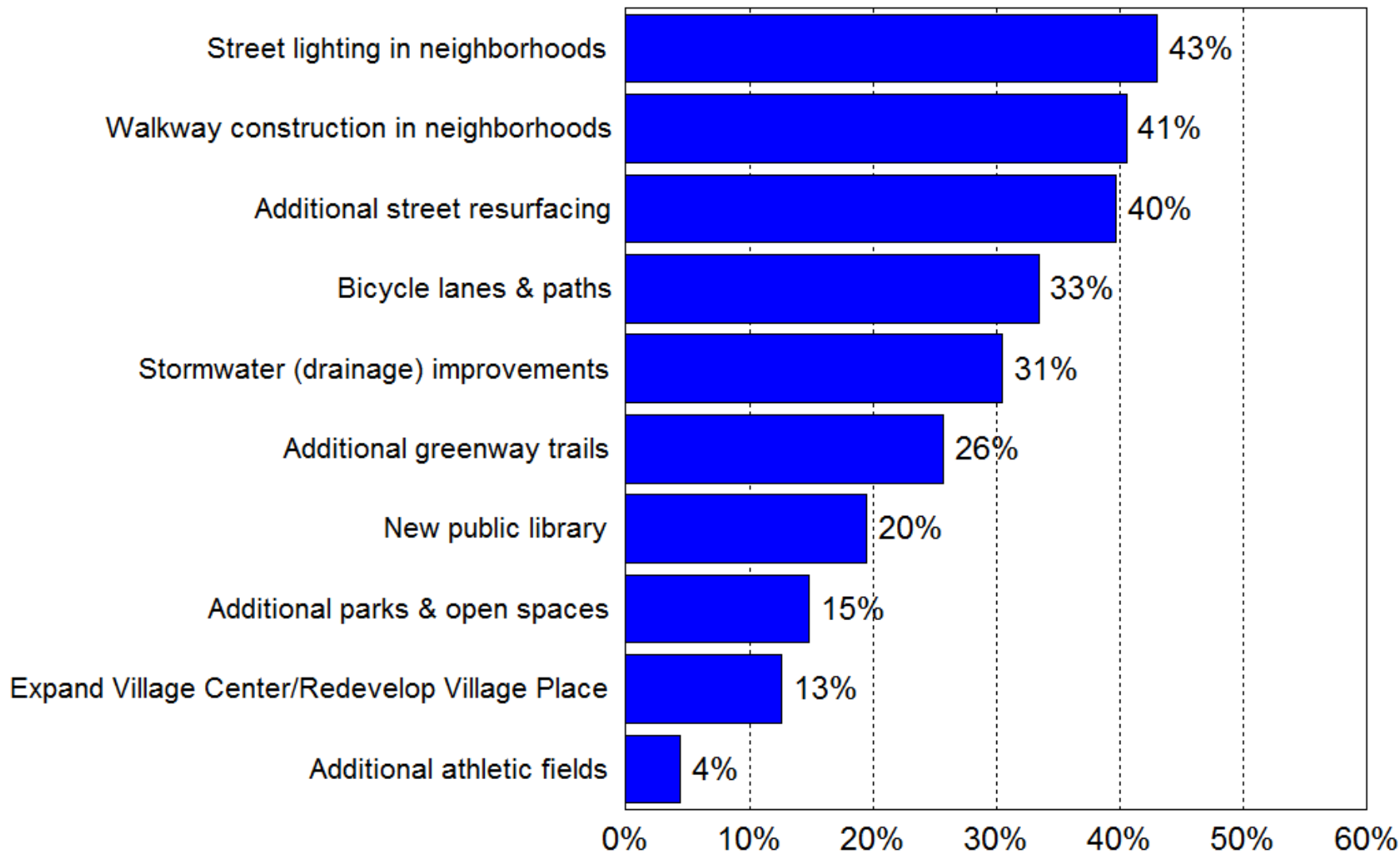
■ Always (5) ■ Usually (4) □ Sometimes(3) ■ Seldom (2,1)

Source: ETC Institute DirectionFinder (2018 - Pinehurst, NC)



# Q23. Capital Improvements That Residents Feel Are the Most Important

by percentage of respondents (3 selections could be made)



Source: ETC Institute DirectionFinder (2018 - Pinehurst, NC)

# Summary

# Summary

- **Residents Have a Very Positive Perception of the Village**
  - ❑ 95% rated Pinehurst as excellent or good place to live
  - ❑ 94% would recommend Pinehurst to others as a place to live
- **Satisfaction Ratings Are Similar to 2017, and Remain Among the Highest in the Nation**
  - ❑ Satisfaction ratings have increased or stayed the same in 45 of 86 areas since 2017; and increased or stayed the same in 70 of 80 areas since 2013
- **Satisfaction with Village Services is Much Higher in Pinehurst Than Other Communities**
  - ❑ The Village rated above the U.S. Average in 50 of 53 areas, and above the Atlantic Regional Average in 46 of the 53 areas that were compared
- **Overall Priorities for Improvement:**
  - ❑ Efforts at maintaining the quality of neighborhoods
  - ❑ Street and right-of-way maintenance
  - ❑ Level of public involvement in local decisions

# Questions?

THANK YOU!!